

VISION INDEX

Connecticut's Visitor Attendance Index

Vol 1703

2017 Summer

Summer: -2% / YTD: -7%

VISION INDEX – Is a monthly benchmark of visitor attendance providing critical context for those evaluating changes in activity and performance at State, regional, local and attraction levels. The INDEX is based on visitor attendance at a diverse panel 30 of the State's leading tourism attractions.

Comparison to 2013 Benchmark

2017 summer was 3% behind the 2013 benchmark and 4% behind it year-to-date.

Seasonality

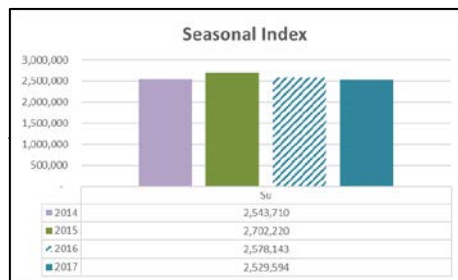
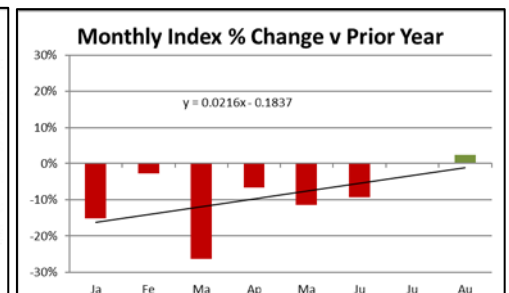
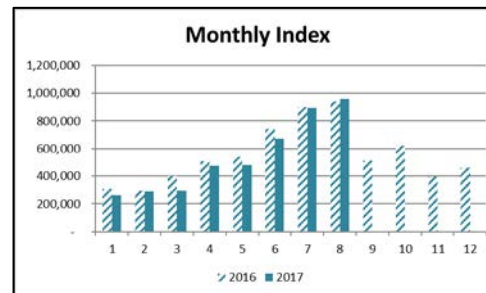
Typically, about 40% of a total year's visitors come during the Summer (Jun – Aug).

Summer 2017 continues a downward slope since 2014 finishing 2% behind summer 2016, which was 5% behind 2015.

2017 Index – The year-do-date INDEX is 7% behind last year at this point two-thirds of the way through the year. This recovers somewhat from where it had been beginning of the summer (spring index was -12%).

While June was in negative territory, July improved to break even compared to last year, and then August's +2% was the first time this year that the panel finished a month ahead of 2016.

Despite the negative year-to-date, summer's results reinforced the year's overall trend in the right direction that began in the spring, projecting more positives as we head into the year's autumn final lap.



1% net gain (\$94 Million) in economic impact for this summer estimated

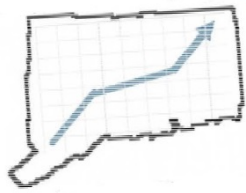
\$14.7 Billion Industry, 59% (\$8.7 Billion) Visitor spending Source: *Economic Impact of Travel in Connecticut* (for year 2015)

Of that spending; summer impact is approximately \$4.5 Billion based on:

- 40% of all Visitors/year / Source: VISION Index (2016)
- Summer Visitors spend more during a visit than they do in other seasons such that the 40% of a year's Visitors are worth 51% of total Visitors' spending/year.
- 4.9 Million Visitor Parties each summer / Source: VISION Intercept Study (Summer 2017)

A 2% decline in Visitors for the summer season would yield a loss of 99,000 Parties and \$90 Million spending, offset by their 6% increase in Spending/Party (to \$936) / Source: VISION Intercept Study (Summer 2017) yielding a net gain of \$55.8 Million spending and \$94 Million industry sales.

Changes Versus Prior Year									
Period		Month		Season		Quarter		Year	
Yr	Month	Count	Change	To Date	Change	To Date	Change	To Date	Change
'16	Dec	461,937	-12%	461,937	-12%	1,479,040	-4%	6,616,265	-3%
'17	Jan	259,900	-15%	721,837	-13%	259,900	-15%	259,900	-15%
'17	Feb	288,432	-3%	1,010,269	-10%	548,332	-9%	548,332	-9%
'17	Mar	293,702	-26%	293,702	-26%	842,034	-16%	842,034	-16%
'17	Apr	472,427	-7%	766,129	-15%	472,427	-7%	1,314,461	-13%
'17	May	477,234	-11%	1,243,363	-14%	949,661	-9%	1,791,695	-12%
'17	Jun	673,185	-9%	673,185	-9%	1,622,846	-9%	2,464,880	-12%
'17	Jul	895,651	0%	1,568,836	-4%	895,651	0%	3,360,531	-9%
'17	Aug	960,758	2%	2,529,594	-2%	1,856,409	1%	4,321,289	-7%



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VISION INDEX and **VISION INTERCEPT** are published by Witan Intelligence, Inc.. These tracking studies measure tourism activity of visitors to our State's attractions, including both State residents and those who live out-of-State. They deliver three perspectives: a) point-in-time, b) longitudinal benchmark and c) attraction-specific insights to help the stewards of Connecticut's attractions, jobs and quality-of-life make informed decisions and measure results. **VISION** studies are used by legislators and professionals in economic development, human resources, tourism, culture and the arts among others.

