

VISION INTERCEPT

Connecticut's Visitor Intercept Study

Vol 1702

2017 Spring

VISION is the only Statewide survey of visitors' experience. For 16 years, insights from and measures of the over 50,000 visitors interviewed have helped stewards of attractions, events, jobs and quality-of-life make informed decisions, and track performance of their plans. Legislators use VISION as do pros in economic development, human resources, tourism, culture and the arts. VISION measures activity whether visitors are residents or live out-of-State, and is a source of spending intel enabling measurement of economic impact.

Market Share: 63% - 8.0 trips/year

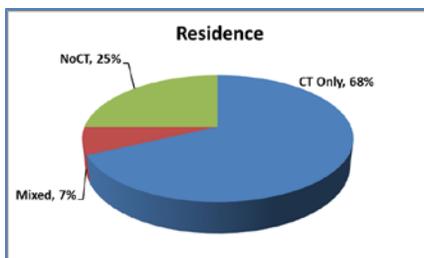
Visitors say that 63% of their 9.3 trips/year were to CT destinations. On average, visitors took 8.0 trips to the State's attractions (vs 7.6 in '16, 8.3 in '15). 42% of visitors took 3+ trips a year to CT.

CT Residents: 75%

75% of parties had a CT resident including 4% that also had someone in their party from out-of-State. CT residents took 10.7 trips/year to CT (9.9 last year).

Out-of-State Draw: 32%

32% of parties included someone visiting from out-of-State, including the 4% who also had a CT resident in their party. Out-of-State visitors took 2.3 trips/year to CT. 9% of visitors came from NY/NJ (35% of Out-of-State visitors).



Spending: \$644

Visitor parties spent an average of \$644 during each trip to the State's attractions and events (\$613 in '16, \$635 in '15). Non-wager spending was \$470 on categories including Entertainment, Lodging, Dining, Shopping and Auto. Wagers were 27% of average overall budget.

Household Annual Value: \$5,154

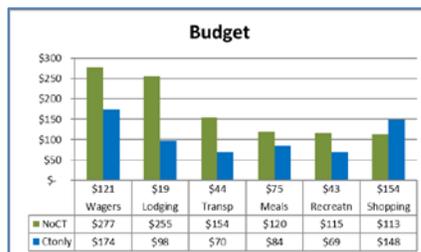
Given the number of trips per year, and average spending per trip, each visitor household spends \$5,154/year in CT (\$4,655 last year).

Note that CT Residents spend less per trip but visit more often than Out-of-State visitors, resulting in comparable annual household value.

Budgets:

Out-of-State visitors spent \$1,035 per trip (\$950 last year) and as expected, more than CT residents on every category except Shopping. Wagers and Lodging were the two largest categories.

CT residents spent \$456 per trip with Shopping as their largest category, followed by Meals and Recreation.



Overnights: 63%

Of parties with out-of-State visitors, two thirds spent at least one overnight during their visit, spending 2.9 nights on average. 39% spent some of their nights in commercial lodging and 46% with family or friends.

Families: 38%

One in three parties included children under age 18. Parties with children took 3.4 trips/year and spent \$635 per trip. 66% from Out-of-State spent an overnight.

Adults-Only: 62%

Two thirds of parties visited with no children. This group took 11.4 trips and spent \$632 per trip.

Seniors: 21%

21% of parties included someone 55 or older.

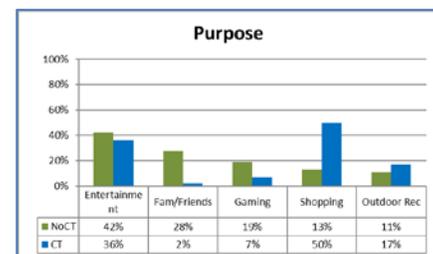
First-Time Visitors: 3%

97% of visitors this season had experienced Connecticut destinations before; 9% of those with only out-of-State residents.

Purpose of Trip:

Out-of-State visitors say key purposes for visiting are Entertainment (42%), visiting Family and Friends (28%) and Gaming (19%).

Residents are far less likely to be visiting Family and Friends or Gaming, and more likely to be Shopping or enjoying Outdoor Recreation



Satisfaction: 68%

68% of visitors gave a high rating (8-10) for their experience in CT, with an average score of 8.1. 3% gave a low (<5) rating. 73% of Out-of-Staters gave high scores.

Household Characteristics:

3.2 persons is average size household

39% have children
39% have ages 18-34
53% have ages 35-54
44% have ages 55+

10% Black ethnicity
13% Hispanic/Latino ethnicity

\$77,300 is Median annual household income
24% earn less than \$50,000
11% earn more than \$150,000

VISION is an on-going study of intercept interviews with visitors to a over 50 attractions and events across the State including museums, casinos, parks, beaches, destination shopping, arts venues, farms and markets, vineyards and welcome centers. The database began in 2001 and now includes the results of over 50,000 interviews. VISION results represent the millions of visitors reported by participating attractions and events each year (which is but a share of all visitors to all CT attractions and events). Statistics based on the year's total sample of over 2,500 parties has a maximum range of error of +/- 1.9% at the .95 Confidence Limit.