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Awareness Study Executive Summary

- 24% have heard of Massachusetts' Pioneer Valley, and a further 31% who said they hadn't heard of The Pioneer Valley HAD heard of one or more of the cities and attractions we measured, for a combined area awareness of 55%.
- The most-recognized area cities are Springfield with 64% awareness and Amherst with 58% awareness.
- The most-recognized attractions are Six Flags New England with 42% awareness and Yankee Candle with 36%.
- The high-awareness attractions also have relatively high awareness of The Pioneer Valley, indicating there is good synergy between them.
- The cities and attractions share some awareness with The Pioneer Valley, but all the entities have portions of awareness that are unique to them. All could amplify their awareness with higher levels of cross-promotion.
- After we asked whether they had heard of each of the cities and attractions within The Pioneer Valley, the percent who said they had never heard of The Pioneer Valley dropped from 75% to 55%, and can be considered "aided awareness".
- 11% have heard of The Pioneer Valley but never visited; they represent good opportunity to convert to visitors.
- A total of 30% have visited The Pioneer Valley; 16% have visited The Pioneer Valley on a leisure trip in the past 3 years, 12 visited on a leisure trip more than 3 years ago and 2% have visited on business.
- Of recent visitors, 69% have been for day trips and 31% for overnight trips.
- 61% of overnight visitors stay in hotels or motels and 43% stay with friends or family.
- May, August and September are the highest months for visitation.
- 81% of overnight visitors are either on vacation or visiting friends and family.
- For overnight visitors, the average length of stay is 3.5 nights.
- Nearly two-thirds of overnight visitors stay for 1 to 3 nights, indicating they are in the area for a short getaway vacation.
- More than half of visitors choose The Pioneer Valley for its scenic beauty and its attractions.
- The average rating by visitors of their vacation experience in The Pioneer Valley is 4.3 on a scale of 5, which is very high.
- Day visitors made an average of 5.5 separate day trips to The Pioneer Valley in the course of the past 3 years.

GSCVB Awareness Study

Page 2-2-2-2

- Only 25% of day-trippers said there is nothing that would prompt them to stay overnight in The Pioneer Valley, meaning that 75% are open to being persuaded.
- 58% of day-trippers say they could be enticed to stay overnight through either lodging specials or packages.
- While the trip type profiles of past and present visitors is somewhat similar, the most interesting finding is that the proportion of day-trip only visitors has increased from 55% 4+ years ago to 69% among recent visitors. This is very likely due to the effects of the economy.
- On average, it has been 7.8 years since the last visit of “past visitors” to The Pioneer Valley.
- The average rating of the vacation experience in The Pioneer Valley, while very good in the past, has actually improved from 4.1 to its current rating of 4.3!
- Nearly two-thirds, 65%, said they would “probably” or “definitely” recommend The Pioneer Valley to friends or family. This compares to 88% of current visitors, meaning that the experiences and perceptions of experiences in the area are significantly improved from the past.
- A very encouraging 53% say they definitely will return to visit The Pioneer Valley, even though it has been more than 3 years since their last visit.
- Among those who have heard of The Pioneer Valley but never visited, there are about one-quarter (23%) who have a high level of interest in visiting the area.
- The most prominent things that come to mind when people hear “Massachusetts’ Pioneer Valley” are nature/beautiful scenery, colleges and Yankee Candle.
- The largest portion of past visitors, 37%, most like the tagline “More to Explore”.
- Of current visitors, the largest portion, 39%, like “Arrive Curious. Leave Inspired.”
- The top origins for school attenders are Boston / Manchester, followed by Springfield / Holyoke and Washington DC.
- The top origins for those who have never heard of The Pioneer Valley are New York City followed closely by Washington DC. Both these markets, while having less awareness of the area name of “The Pioneer Valley”, have heard of either the cities and / or attractions within the area. The challenge is to increase the association with the name “The Pioneer Valley” to begin to create a basis for interest in visitation.

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