Connecticut Traveler Profile

Visualizations Derived from OmniTrak’s TravelTrakAmerica Data

Summarized by Jerry Henry
CEO, H2R Market Research
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Project Overview

PURPOSE
The purpose of 2017 Connecticut Traveler Profile Study is to provide decision makers with an objective profile of who visits Connecticut, what they do while visiting, how much they spend and more. All of these metrics are then compared and contrasted to 8 other competitive states in the Northeast.

TARGET AUDIENCE
The data was purchased from OmniTrak’s Travels America and represents 2017 Connecticut travelers across all 12 months of the year. States in the competitive set include: Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island and Vermont.

WHO’S IN THE COMP SET
A total of 724 Connecticut travelers were interviewed in this study, providing a maximum margin of error of +/-3.6% at a 95% confidence interval which is considered comparatively strong by industry standards.
Definitions

**Traveler**

- It is worth noting that OmniTrak, like all syndicated travel research providers including Longwoods and D.K. Shifflet, uses a standard definition of traveler developed by the U.S. Travel Association. As a result, in this report “travelers” are defined as anyone who travels more than 50 miles from home and/or stays overnight in the destination.

- This, however, is somewhat different from Connecticut’s own definition of a traveler. Because Connecticut has a comparatively unique geographic setting being located so close to New York City, the state defines travelers as anyone who travels outside of their normal range of commuting.

**Competitive Set (Comp Set)**

- Additionally, most of the visualizations in this presentation show Connecticut travelers’ behavior and then provide a comparison to how the relates to travelers’ behavior from competitive New England states (comp set) including NY, NJ, MA, RI, CT, ME, VT, NH, and PA.
Topline Connecticut Traveler Insights

- 70% of Connecticut travelers spent the night in 2017
- 80% visited Connecticut for leisure purposes
- 11% of Connecticut visitors arrived by air, but that is considerably lower than the comp set’s 15%
- More than half (54%) of Connecticut travelers stayed overnight in a hotel
- The average party spent $585 last year
- Shopping, gaming, fine dining, historic sites and visiting friends/relatives were the most popular activities among Connecticut visitors
- The average Connecticut visitor spent 109 days considering their trip last year and made the decision to visit 80 days prior to traveling to Connecticut
- 40% didn’t book any arrangements prior to visiting and Connecticut travelers were nearly as likely to book offline as they were to book online
- Only 20% booked their travel arrangements on an Online Travel Agency website while 22% visited a destination website.
- 15% have traveled to take a sports trip in the past. And, one-quarter of those trips were for Youth Sports
- More than 30% have used shared economy lodging and nearly 40% have used shared economy transportation services.
- Average household income last year was $99.4k
- Most Connecticut visitors (59%) have a college degree
- 38% had children in their party
- Connecticut’s biggest feeder markets were NYC, Boston, Hartford, Providence and Philadelphia DMAs
## Characteristics that Connecticut Travelers are more likely to exhibit than visitors to regional competitors

<table>
<thead>
<tr>
<th></th>
<th>Connecticut</th>
<th>Variance to Comp Set</th>
<th>Insight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit from Out-of-State</td>
<td>83%</td>
<td>+10.4%</td>
<td>Most tourism tax revenue is paid by others</td>
</tr>
<tr>
<td>Earn HH Income of $50k+</td>
<td>81%</td>
<td>+8.1%</td>
<td>Have the ability to enjoy upscale experiences</td>
</tr>
<tr>
<td>Booked Arrangements Before Visiting</td>
<td>60%</td>
<td>+8.1%</td>
<td>40% don’t book online, not in online analytics</td>
</tr>
<tr>
<td>Stayed Overnight in Hotel</td>
<td>54%</td>
<td>+7.9%</td>
<td>Helps drive up visitor spending</td>
</tr>
<tr>
<td>Passing Thru the State</td>
<td>21%</td>
<td>+7.3%</td>
<td>Opportunity to intercept in route elsewhere</td>
</tr>
<tr>
<td>Visited Destination Website</td>
<td>22%</td>
<td>+7.1%</td>
<td>The digital strategy is moving people</td>
</tr>
<tr>
<td>Have a AAA Membership</td>
<td>64%</td>
<td>+5.7%</td>
<td>Possibly a partnership opportunity</td>
</tr>
<tr>
<td>Have Taken Cruise in the Past</td>
<td>49%</td>
<td>+5.5%</td>
<td>Other competition may not have considered</td>
</tr>
<tr>
<td>Employed Outside the Home</td>
<td>69%</td>
<td>+5.2%</td>
<td>Visits must be worked around job obligations</td>
</tr>
<tr>
<td>Have College Degree</td>
<td>59%</td>
<td>+4.9%</td>
<td>Thoughtful experiences may be in higher demand</td>
</tr>
<tr>
<td>Have Vacation Benefits</td>
<td>45%</td>
<td>+4.1%</td>
<td>Leisure trips are not guaranteed</td>
</tr>
<tr>
<td>Age 55+</td>
<td>39%</td>
<td>+3.7%</td>
<td>CT attracts a slightly older visitor</td>
</tr>
<tr>
<td>Visited for Business Purposes</td>
<td>14%</td>
<td>+3.6%</td>
<td>Leisure dominates, but still do lots of business travel</td>
</tr>
<tr>
<td>No Children in Party</td>
<td>62%</td>
<td>+3.2%</td>
<td>Families are slightly less likely to visit CT</td>
</tr>
</tbody>
</table>
Characteristics that Connecticut Travelers are **less likely** to exhibit than visitors to regional competitors

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Connecticut</th>
<th>Variance to Comp Set</th>
<th>Insight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Earn HH Income of Less than $50k</td>
<td>19%</td>
<td>-8.1%</td>
<td><em>Have the ability to enjoy upscale experiences</em></td>
</tr>
<tr>
<td>Length of Stay (Nights)</td>
<td>3.8 nts</td>
<td>-7.3%</td>
<td><em>Likely because CT hosts fewer air travelers from distance</em></td>
</tr>
<tr>
<td>Stayed Overnight in Private Home</td>
<td>25%</td>
<td>-6.7%</td>
<td><em>More travelers stay in commercial lodging</em></td>
</tr>
<tr>
<td>Unemployed</td>
<td>9%</td>
<td>-5.2%</td>
<td><em>CT Travelers more likely to have a job</em></td>
</tr>
<tr>
<td>Edu Attainment – Some College or Less</td>
<td>30%</td>
<td>-5.2%</td>
<td><em>More travelers stay in commercial lodging</em></td>
</tr>
<tr>
<td>Visited the Beach</td>
<td>8%</td>
<td>-5.1%</td>
<td><em>Likely because CT has fewer beach opportunities</em></td>
</tr>
<tr>
<td>Never Used Sharing Eco Transportation</td>
<td>63%</td>
<td>-4.2%</td>
<td><em>CT Travelers more likely to use Sharing Eco services</em></td>
</tr>
<tr>
<td>Consideration Time &lt; 2 Weeks</td>
<td>28%</td>
<td>-3.9%</td>
<td><em>CT attracts fewer impulsive trips; most planned out</em></td>
</tr>
<tr>
<td>Primary transportation – air travel</td>
<td>11%</td>
<td>-3.7%</td>
<td><em>Leisure dominates, but still do lots of business travel</em></td>
</tr>
<tr>
<td>Primary purpose of visit was leisure</td>
<td>80%</td>
<td>-3.2%</td>
<td><em>Mainly leisure, but business travel stands out</em></td>
</tr>
<tr>
<td>“<em>I use the internet constantly</em>”</td>
<td>75%</td>
<td>-3.1%</td>
<td><em>CT Travelers are less likely to be found online</em></td>
</tr>
<tr>
<td>“<em>I need at least one vacation trip/year</em>”</td>
<td>49%</td>
<td>-2.8%</td>
<td><em>CT Travelers feel slightly less strong need for vacations</em></td>
</tr>
<tr>
<td>Booked Trip via Online Travel Agency</td>
<td>19%</td>
<td>-1.6%</td>
<td><em>CT Travelers less likely to be found on OTA websites</em></td>
</tr>
</tbody>
</table>
Travel Profile
The vast majority (83%) of Connecticut tourism is generated from out-of-state travelers, even 10 points higher than the comp set.

*Using travel industry standard definitions

**SOURCE:** OmniTrak, “TravelTrakAmerica,” 2017
Most (70%) Connecticut travelers spend the night in the area, comparable to the overarching comp set

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
About one in four Connecticut visitors were passing through on their way to another destination. Connecticut is more likely to be a pass through state than other states in the competitive set.

**Pass Thru Visitors**
- Not a Pass Thru: 79%
- Pass thru State: 21%

**Versus Comp Set**
- Pass thru State: 7.3%
- Not a Pass Thru: -7.3%

**Pass Thru or Not a Pass Thru State**

*SOURCE: OmniTrak, “TravelTrakAmerica,” 2017*
Most (80%) Connecticut travelers visit for leisure purposes. But, it is business travel that sets the state apart from New England as a whole.

### Purpose of Visit

- **Leisure**: 80%
- **Business**: 14%
- **Personal**: 4%
- **Other**: 2%

### Versus Comp Set

- **Leisure**: -3.2%
- **Business**: 3.6%
- **Personal**: -0.3%
- **Other**: -0.1%

**Note that 23% of CT business travelers extend their stay to enjoy some leisure while there**

**SOURCE:** OmniTrak, “TravelTrakAmerica,” 2017
Three quarters (75%) of Connecticut visitors arrive by car/truck while 11% fly. And, Connecticut is less likely than its competitors (-3.7 points) to attract visitors arriving by commercial air.
Connecticut’s average Length of Stay has increased since 2014, but it remains 0.3 days shorter than both the comp set and the USA as a whole.

<table>
<thead>
<tr>
<th>Length of Stay</th>
<th>Connecticut</th>
<th>Comp Set</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average</td>
<td>3.8</td>
<td>4.1</td>
<td>4.1</td>
</tr>
</tbody>
</table>

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
More than half (54%) of Connecticut Travelers stay overnight in hotels, 25% in private homes and 4% in shared economy lodging.

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
The average Connecticut travel party spends $585 on their visit, $192 more than travelers across the comp set. But, $100 less than travelers nationwide.

Average Spending per Party

- Connecticut: $585
- Comp Set: $393
- USA: $685

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
In-Market Travel Behavior
Arts & Culture. Connecticut travelers are more likely to visit art galleries, historic sites and old homes than visitors to other regional states.

Source: OmniTrak, “TravelTrakAmerica,” 2017
Adventure Sports. Connecticut travelers are less likely to participate in most adventure sports than other states with the exception of Mountain Biking.

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
Sports & Recreation. Connecticut travelers are more likely to participate in most sports & recreation activities, than other states.

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
Nature. In general, Connecticut travelers are less likely to participate in nature/outdoor activities, than the comp set overall.

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
Entertainment. Connecticut travelers are far more likely to enjoy casino gaming, but less likely to shop, visit theme parks or wineries/craft breweries than other states.

**SOURCE:** OmniTrak, “TravelTrakAmerica,” 2017
Family Activities/Reunions. Many Connecticut travelers visit relatives or friends while visiting the state

<table>
<thead>
<tr>
<th>Activity</th>
<th>CT</th>
<th>Comp Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting relatives</td>
<td>21.8%</td>
<td>23.7%</td>
</tr>
<tr>
<td>Visiting friends</td>
<td>13.7%</td>
<td>14.2%</td>
</tr>
<tr>
<td>Family reunion</td>
<td>5.2%</td>
<td>4.0%</td>
</tr>
<tr>
<td>High School/College reunion</td>
<td>1.2%</td>
<td>0.6%</td>
</tr>
</tbody>
</table>

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
Travel Planning
The average Connecticut traveler spent 109 days thinking about & considering their trip prior to visiting in 2017

Consideration Time*

- < 2 Weeks: 28%
- 2-4 Weeks: 17%
- 1-3 Months: 19%
- Over 3 Months: 36%

*Total elapsed time from the moment respondent began considering places to go to the time they took the trip.

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
The average Connecticut traveler took 80 days to decide to visit Connecticut prior to actually making the trip in 2017.

*Total elapsed time from the moment respondent made the decision to visit Connecticut to the time they took the actual trip.

**SOURCE:** OmniTrak, “TravelTrakAmerica,” 2017
Four in ten did not book any arrangements prior to visiting Connecticut. And those who did were more likely to book offline than their comp set counterparts.

**Booked Prior to Visiting**

- **Booked arrangements**: 60%
- **Did not book arrangements**: 40%

**Versus Comp Set**

- **Booked Online**: 60%
  - Versus Comp Set: +1.9%
- **Booked Offline**: 20%
  - Versus Comp Set: +6.2%
- **Did Not Book**: 20%
  - Versus Comp Set: -8.5%

**SOURCE**: OmniTrak, “TravelTrakAmerica,” 2017
Connecticut travelers are more likely to visit the state’s official website to book travel than other states’ travelers.

**SOURCE:** OmniTrak, “TravelTrakAmerica,” 2017
The internet and social media play a large role in the lives of most Connecticut visitors, but less so than among the comp set as a whole.

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
More than one-third of Connecticut visitors say they “travel as often as possible,” slightly higher than the comp set as a whole.

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
Psychographic Insights
Six in ten Connecticut travelers reporting having at least one AAA member in their household, about 6 points higher than among the comp set.

**Any AAA Members in HH**
- AAA Member(s) in HH: 64%
- No AAA Members: 36%

**Versus Comp Set**
- No AAA Members: -5.7%
- AAA Member(s) in HH: 5.7%

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
Most New England travelers to not receive vacation benefits, but Connecticut travelers (45%) are more likely to than average.

**Vacation Benefits**
- Do not have any vacation benefits: 55%
- Have vacation benefits: 45%

**Versus Comp Set**
- Do not have any vacation benefits: -4.1%
- Have vacation benefits: 4.1%

**SOURCE:** OmniTrak, “TravelTrakAmerica,” 2017
Nearly half (49%) of Connecticut travelers say they have taken at least one sea cruise in the past, nearly 6 points higher than among the comp set.

**Ever Taken a Cruise**
- Have never taken cruise: 51%
- Have taken cruise in past: 49%

**Versus Comp Set**
- Have never taken cruise: -5.5%
- Have taken cruise in past: 5.5%
More than one in four (21%) of Connecticut travelers have taken a cruise in the past 3 years, nearly 2 points higher than among comp set travelers.

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
Of those Connecticut visitors who travel for sports, more than one-quarter travel for Youth Sports and nearly 70% for team sports as opposed to individual sports.

35% say they spend 3.0 extra nights in the area when they travel for sports.

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
About 15% of Connecticut travelers indicated they had traveled on a sports-related trip in the past, nearly 1 point higher than the comp set.

**Taken Any Sports Trips**
- Yes, have traveled on sports trips: 15%
- No, have not traveled for sports trips: 86%

**Versus Comp Set**
- Yes, have traveled on sports trips: 0.7%
- No, have not traveled for sports trips: -0.7%

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
One in three Connecticut visitors report having used Sharing Economy Lodging in the past, mostly for leisure and mostly with AirBnB.

**Sharing Economy - Lodging**

- Yes, Leisure: 29.3%
- Yes, Business: 4.3%
- No, Neither: 69.5%

**Sharing Economy Brands Used**

- AirBnB: 58.1%
- HomeAway: 22.7%
- VRBO: 17.2%
- Other: 13.4%
- HomeExchange: 10.5%
- InterHome: 6.9%
- FlipKey: 5.4%
- Couchsurfing: 4.3%
- Onefinestay: 1.6%
- Wimdu: 1.0%

**SOURCE:** OmniTrak, “TravelTrakAmerica,” 2017
Nearly one in four Connecticut visitors report having used Sharing Economy Transportation in the past, mostly for local transportation and with Uber.

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
Visitor Demographics
Connecticut travelers earned an average household income of $99.4k last year compared to comp set travelers at $89.5k.

**Household Income**

- Under $50,000: 19%
- $50,000 - $99,999: 36%
- $100,000 & Up: 45%

**Versus Comp Set**

- Under $50,000: -8.1%
- $50,000 - $99,999: 2.3%
- $100,000 & Up: 5.8%

Average = $99.4k vs $89.5k among comp set
Median = $82.1k vs $72.7k among comp set

**SOURCE:** OmniTrak, “TravelTrakAmerica,” 2017
Most 2017 Connecticut travelers were married, but compared to other state’s visitors it was the “never married” segment that stands out.

Marital Status

- Now married: 57%
- Never married: 30%
- Divorced, Widowed, Separated: 13%

Versus Comp Set

- Never married: +2.8%
- Now married: -2.0%
- Divorced, Widowed, Separated: -0.8%

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
Most Connecticut visitors last year were White/Caucasian. However, compared to travelers to other New England states, Connecticut travelers are somewhat more likely to be Asian or Pacific Islander.

Note, additionally, 5.8% reported having a Hispanic heritage.

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
Nearly 6 in 10 Connecticut travelers have college degrees or better, about 5 points higher than that observed among the comp set.

Note, additionally, 5.8% reported having a Hispanic heritage.

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
Nearly 70% of Connecticut’s visitors last year were employed either full or part-time, and they are more likely to be employed than other states’ visitors.

Note, additionally, 5.8% reported having a Hispanic heritage.

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
Nearly one-third (31%) of Connecticut visitors last year had children in their parties. However, the state was more likely to attract adult couples than other states in the comp set.
Last year the average Connecticut Traveler survey respondent was 47.8 years old, or 1.0 year old than travelers in the overarching comp set.

**Age of Respondent**

- 18-34 years: 31%
- 35-54 years: 39%
- 55+ years: 30%

**Versus Comp Set**

- 18-34 years: 0.4%
- 35-54 years: -4.1%
- 55+ years: 3.7%

**Source:** OmniTrak, “TravelTrakAmerica,” 2017
Connecticut’s average travel party size in 2017 was 2.38 people. And, an average of 1.96 or 82% came from the same household.

<table>
<thead>
<tr>
<th>Travel Party</th>
<th>Household</th>
</tr>
</thead>
<tbody>
<tr>
<td>CT</td>
<td>Comp Set</td>
</tr>
<tr>
<td>Average Travel Party</td>
<td>2.38</td>
</tr>
<tr>
<td>Average HH Size</td>
<td>1.96</td>
</tr>
</tbody>
</table>

**SOURCE:** OmniTrak, “TravelTrakAmerica,” 2017
In addition to visiting Connecticut, visitors to Connecticut are most likely to have visited Massachusetts and/or New York State over the past 3 years.

**Source:** OmniTrak, “TravelTrakAmerica,” 2017
The states that generated the most travelers to Connecticut last year included Massachusetts, New York and Connecticut.

<table>
<thead>
<tr>
<th>Origin States</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Massachusetts</td>
<td>22.0%</td>
</tr>
<tr>
<td>New York</td>
<td>19.2%</td>
</tr>
<tr>
<td>Connecticut</td>
<td>18.9%</td>
</tr>
<tr>
<td>New Jersey</td>
<td>4.2%</td>
</tr>
<tr>
<td>Florida</td>
<td>3.9%</td>
</tr>
<tr>
<td>Rhode Island</td>
<td>3.9%</td>
</tr>
<tr>
<td>California</td>
<td>3.1%</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>2.7%</td>
</tr>
</tbody>
</table>

*SOURCE: OmniTrak, “TravelTrakAmerica,” 2017*
The individual markets (DMAs) that generated the most visits for Connecticut last year included New York City, Boston and Hartford.

<table>
<thead>
<tr>
<th>Origin Markets</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York</td>
<td>21.8%</td>
</tr>
<tr>
<td>Boston</td>
<td>18.7%</td>
</tr>
<tr>
<td>Hartford</td>
<td>15.5%</td>
</tr>
<tr>
<td>Providence</td>
<td>6.1%</td>
</tr>
<tr>
<td>Philadelphia</td>
<td>3.3%</td>
</tr>
<tr>
<td>Springfield MA</td>
<td>2.6%</td>
</tr>
<tr>
<td>Washington, DC</td>
<td>2.2%</td>
</tr>
<tr>
<td>Burlington</td>
<td>1.8%</td>
</tr>
</tbody>
</table>

SOURCE: OmniTrak, “TravelTrakAmerica,” 2017
Thank You!

Reveal Your Customer’s Full Experience

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