



2013 Traveler Profile Research

Prepared by



Project Overview

PURPOSE

The purpose of 2013 Connecticut Traveler Profile & Benchmark Comparison Study is to provide decision makers with an objective profile of who visits Connecticut, what they do there, 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 TNS Travels America and represents 2013 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 549 Connecticut travelers were interviewed in this study, providing a maximum margin of error of +/-4.2% at a 95% confidence interval which is considered comparatively strong by industry standards.

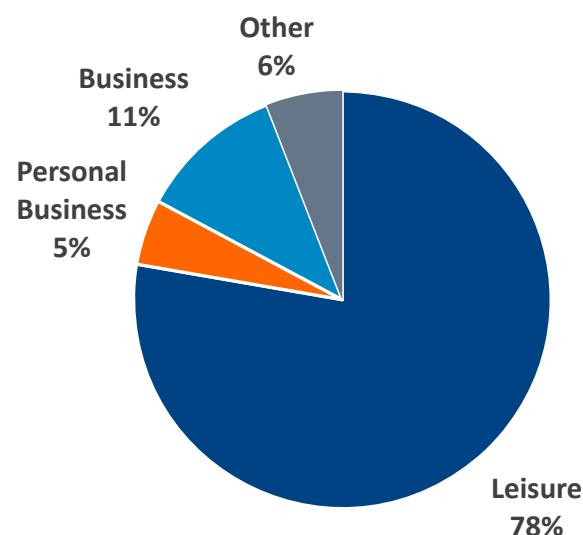
Traveler Profile Versus Economic Impact

- It is worth noting that TNS, 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. They define “travelers” 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 that was used to a greater extent to project economic impact. Because Connecticut has a comparatively unique geographic setting being so close to New York City, the state defines travelers as anyone who travels outside of their normal range of commuting. While Tourism Economics examined Longwood’s and the Vision report’s data as one of many inputs in their projections, their final projections of economic impact were generated as closely to Connecticut’s definition of travelers as possible.
- As a result, the travelers included in the following profile are ***not the same*** as the traveler spending included in the Economic Impact report, and cannot necessarily be compared and contrasted with one another. This report does, however, enable an apples-to-apples comparison of Connecticut’s traveler profile relative to competitors.

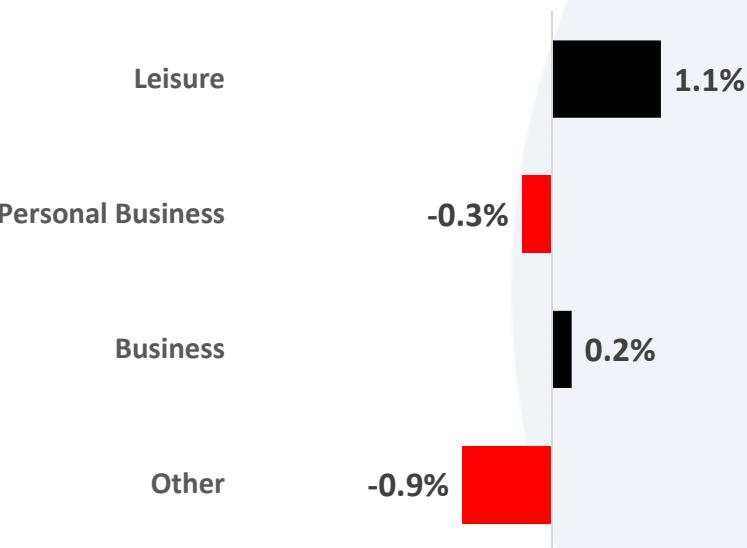
Primary Purpose of Trip

Nearly four out of five Connecticut travelers visit the state for the purpose of taking a leisure trip. Travelers are more likely to visit Connecticut for leisure than the comp set as a whole.

Purpose of Trip to Connecticut



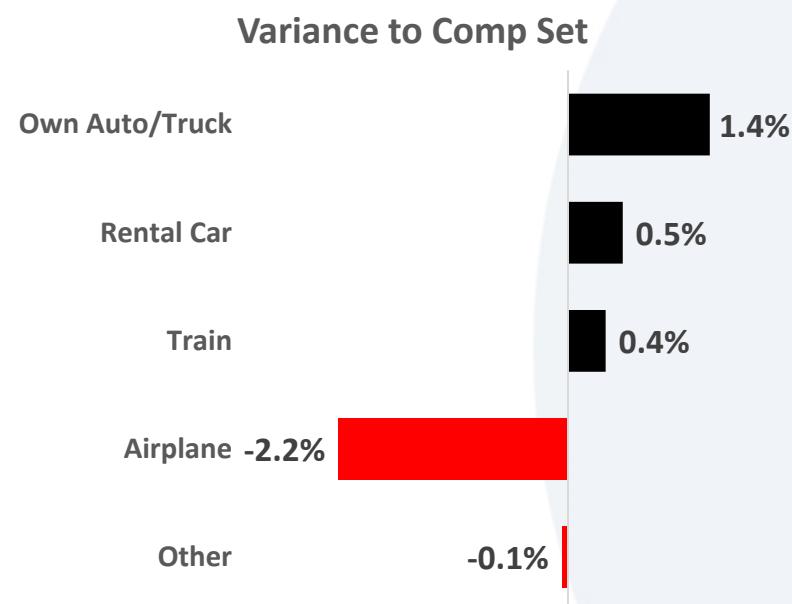
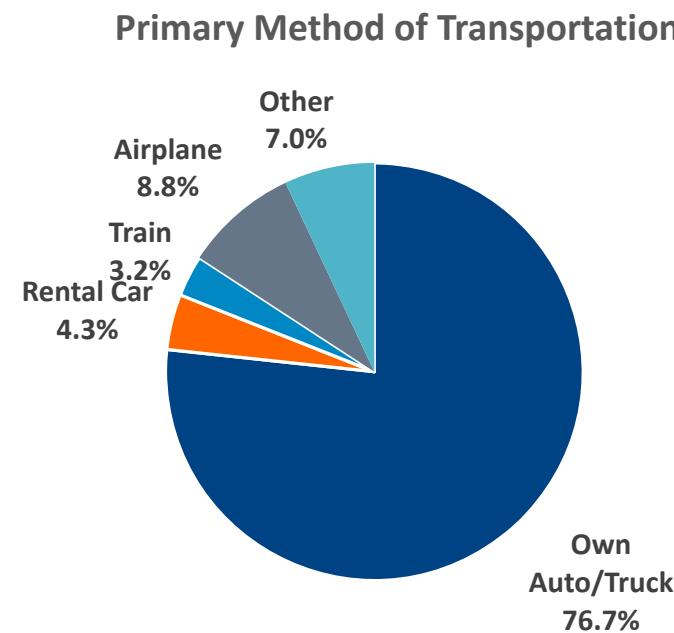
Variance to Comp Set



SOURCE: TNS Travels America 2013

Primary Method of Transportation

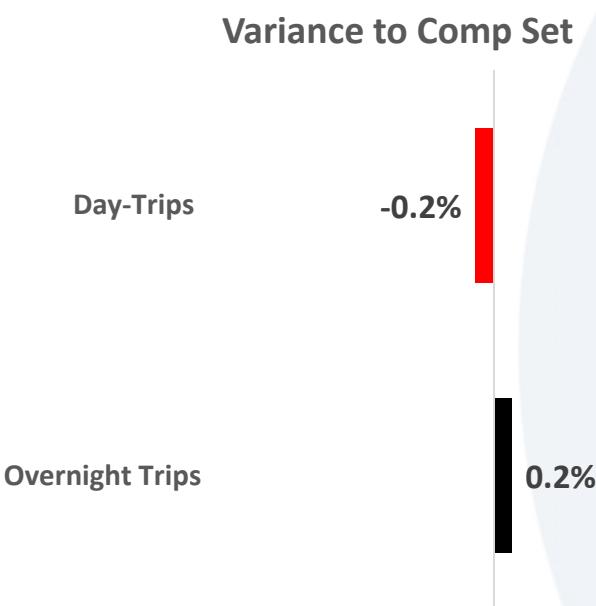
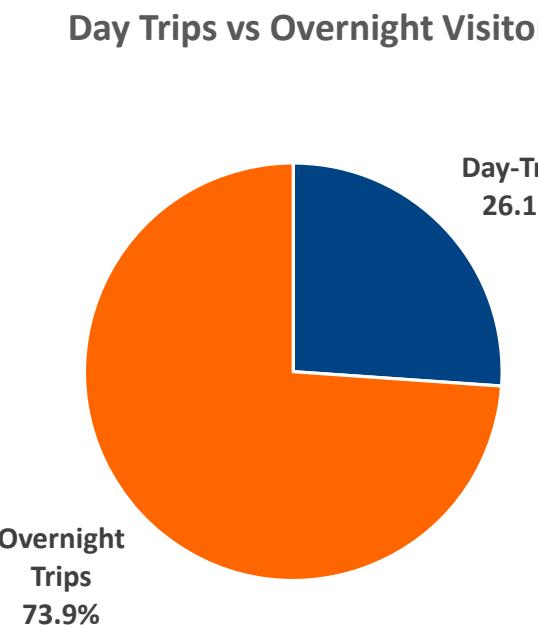
More than three-quarters of all trips to Connecticut are made by personal automobile. Travelers are more likely to visit Connecticut by Auto/Truck than other states in the comp set.



SOURCE: TNS Travels America 2013

Overnight Travelers

Nearly three-quarters of all Connecticut travelers spend the night in the state, slightly more than average for the comp set.

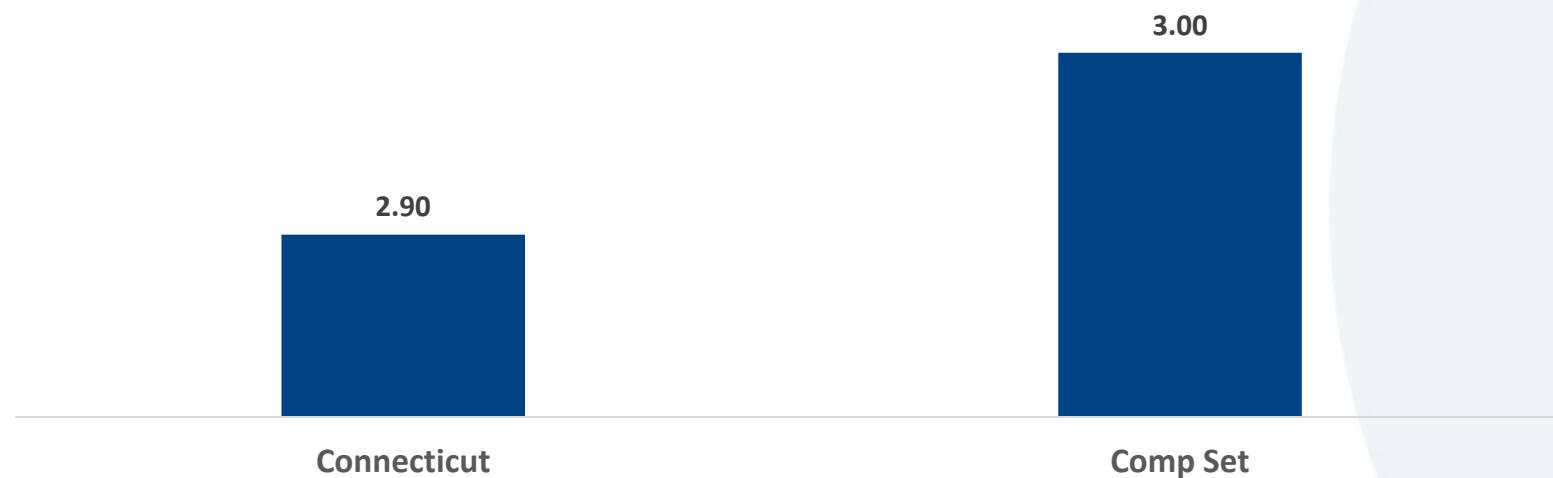


SOURCE: TNS Travels America 2013

Length of Stay

Connecticut travelers spent an average of 2.9 nights in the state in 2013, about the same as the comp set.

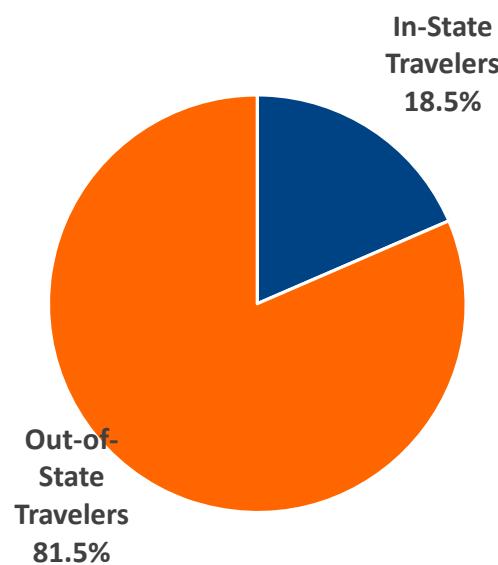
Average Length of Stay



In-State Travelers (Using Standard Definition)

Using the U.S. Travel Industry Association's standard definition of traveler, TNS found that 18.5% of Connecticut's trips were generated by Connecticut residents in 2013.

In-State vs Out-of-State Travelers



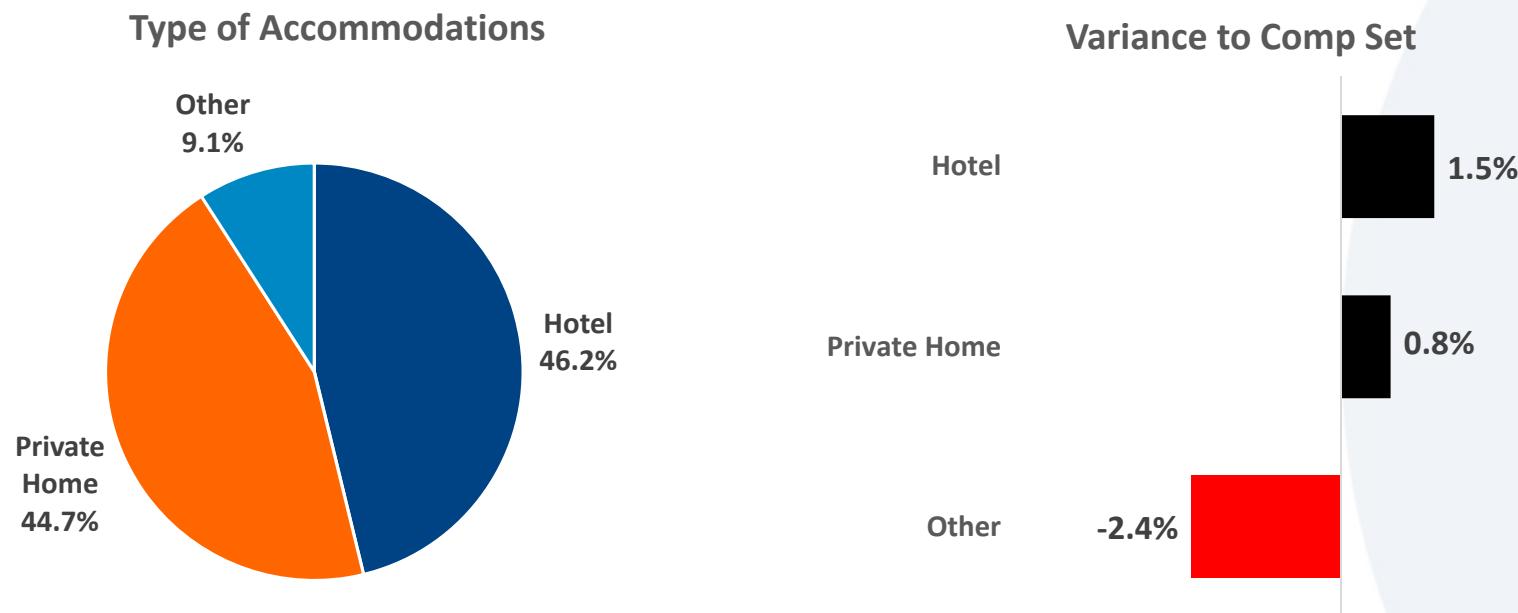
Variance to Comp Set



SOURCE: TNS Travels America 2013

Accommodations

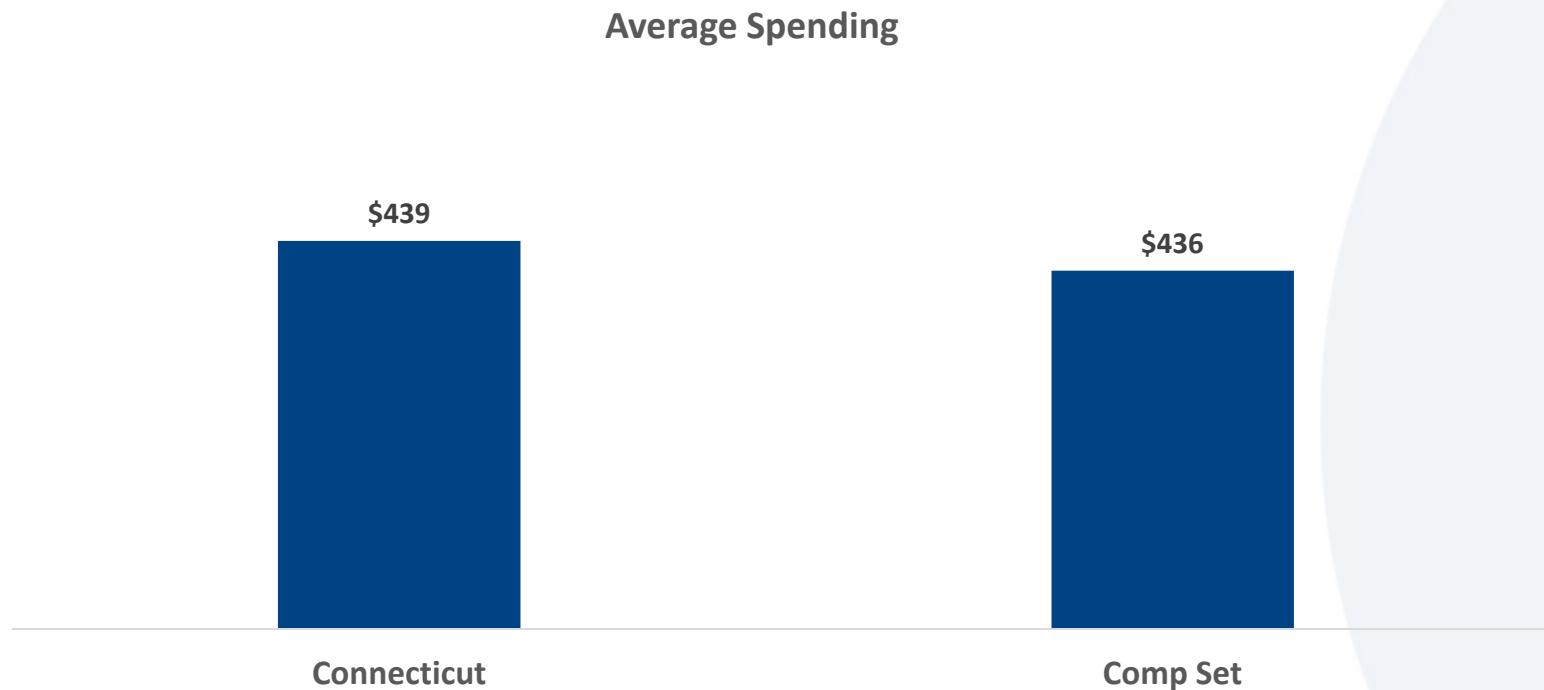
Nearly half spend the night in a hotel/motel when visiting Connecticut, but nearly as many stay with friends and relatives in a private home. Connecticut visitors are slightly more likely to stay in a hotel than comp set travelers.



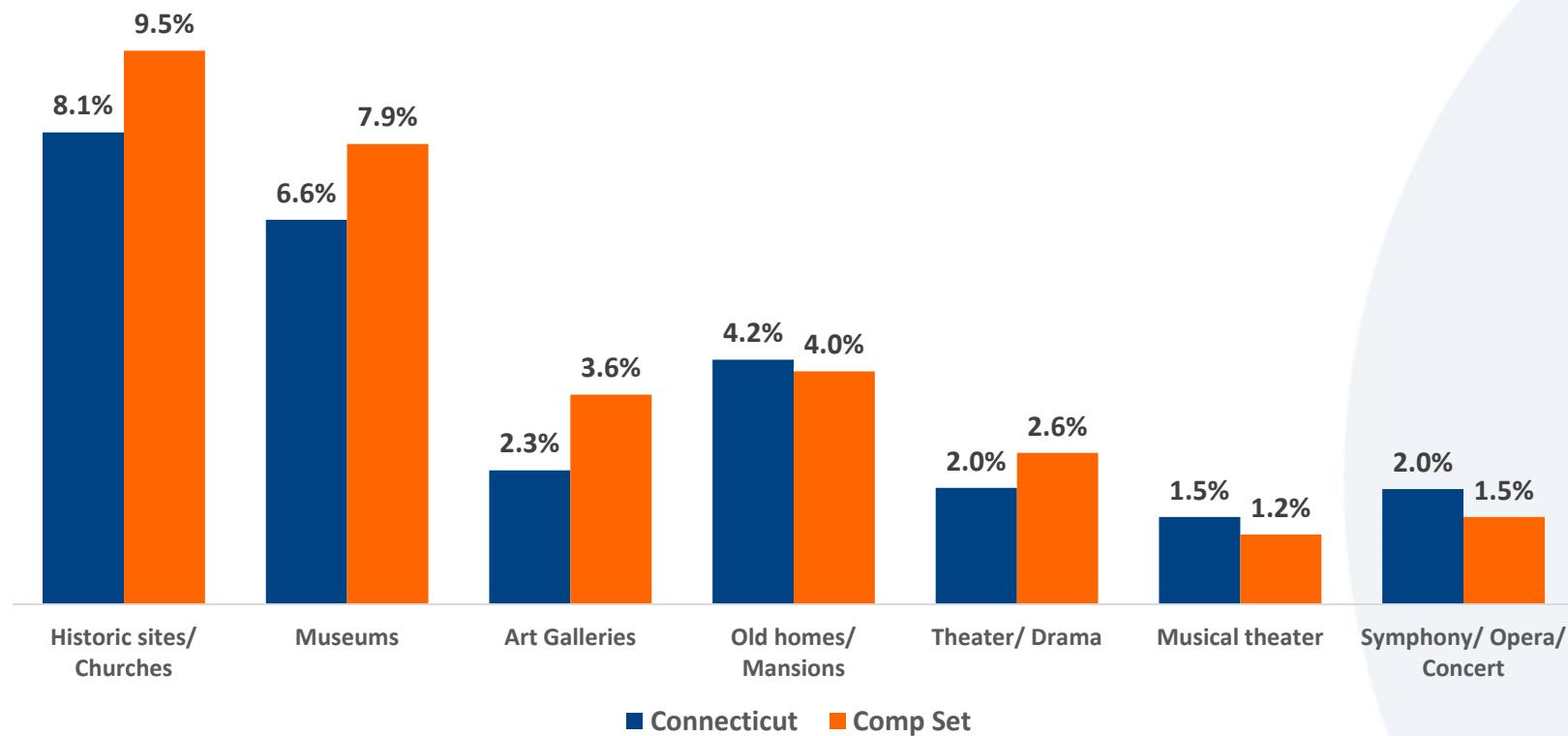
SOURCE: TNS Travels America 2013

Spending per Party

Connecticut travelers spent an average of \$439 during their visit, about the same as the comp set's average.

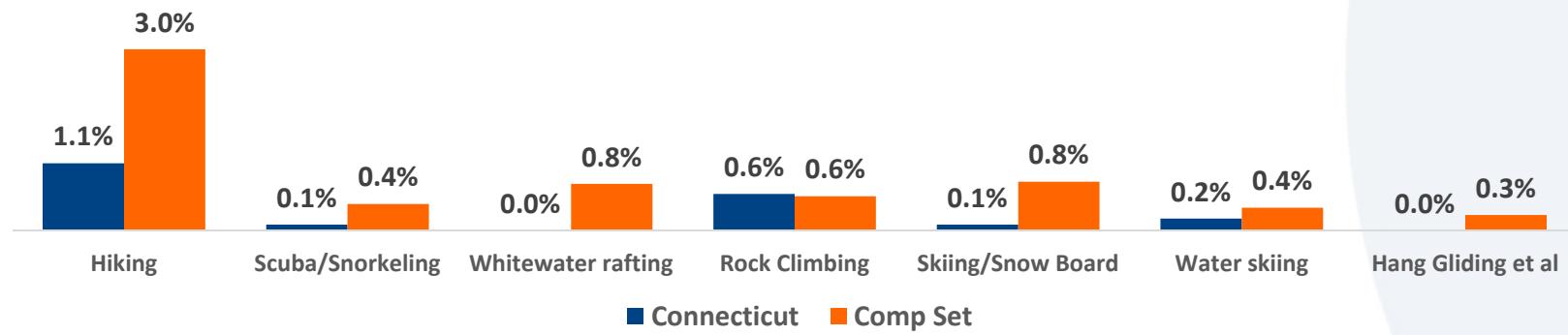


Activity Participation: Art & Culture



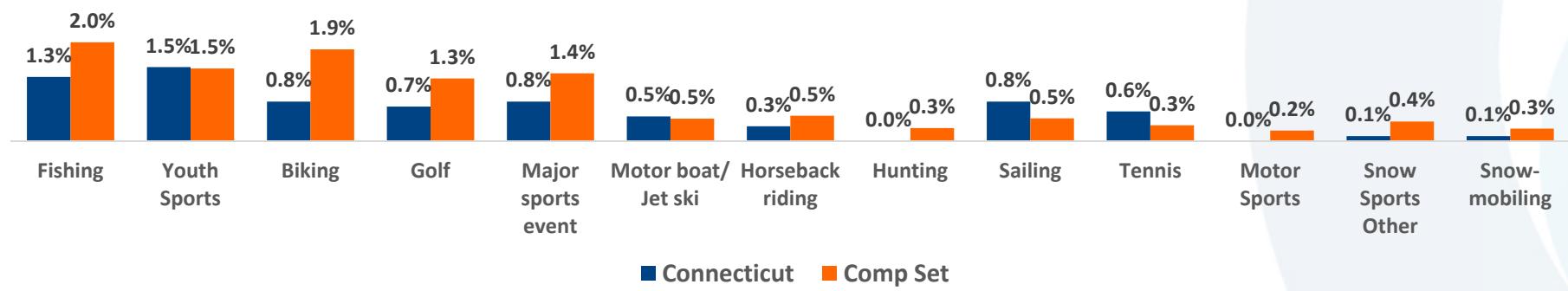
SOURCE: TNS Travels America 2013

Activity Participation: Adventure Sports



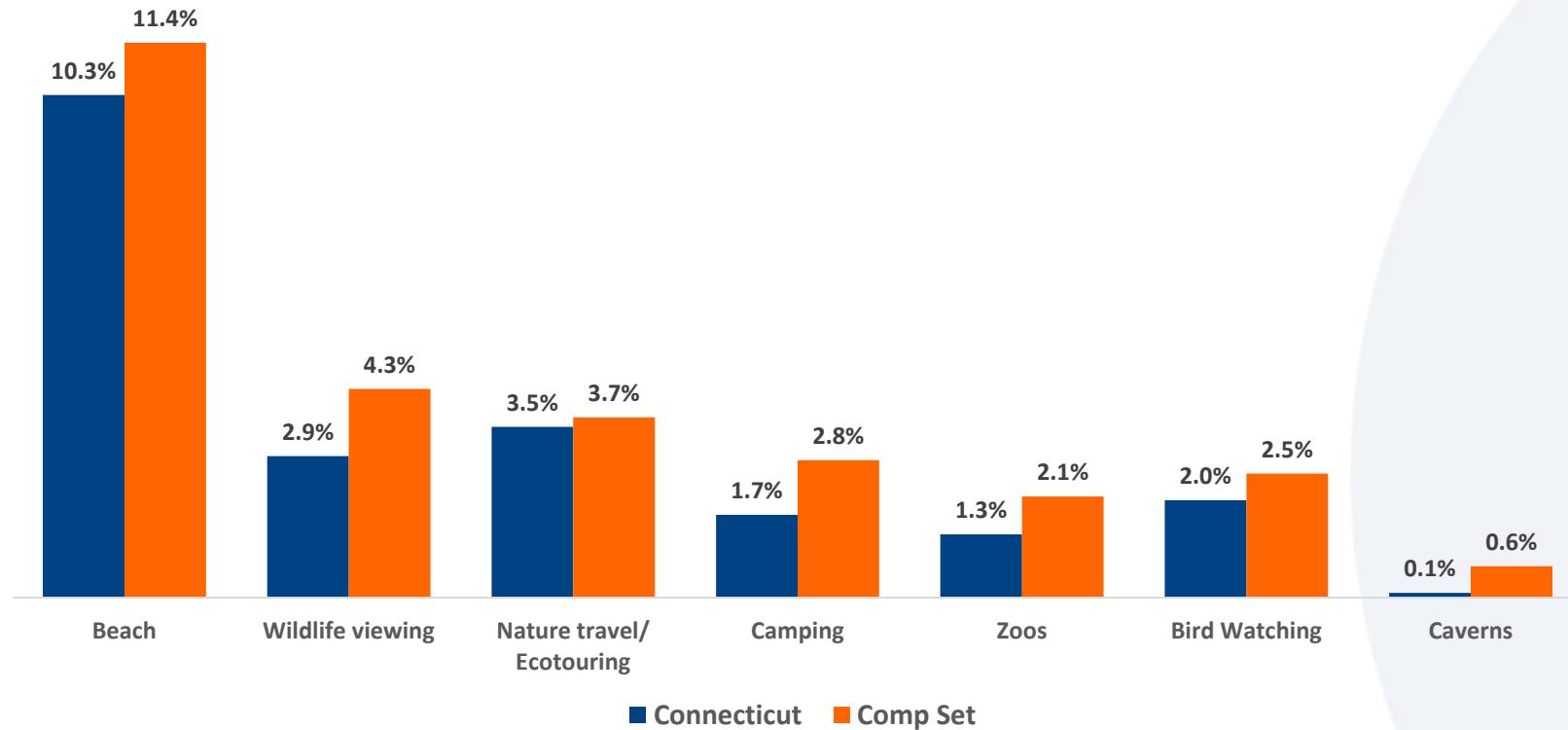
SOURCE: TNS Travels America 2013

Activity Participation: Sports & Recreation



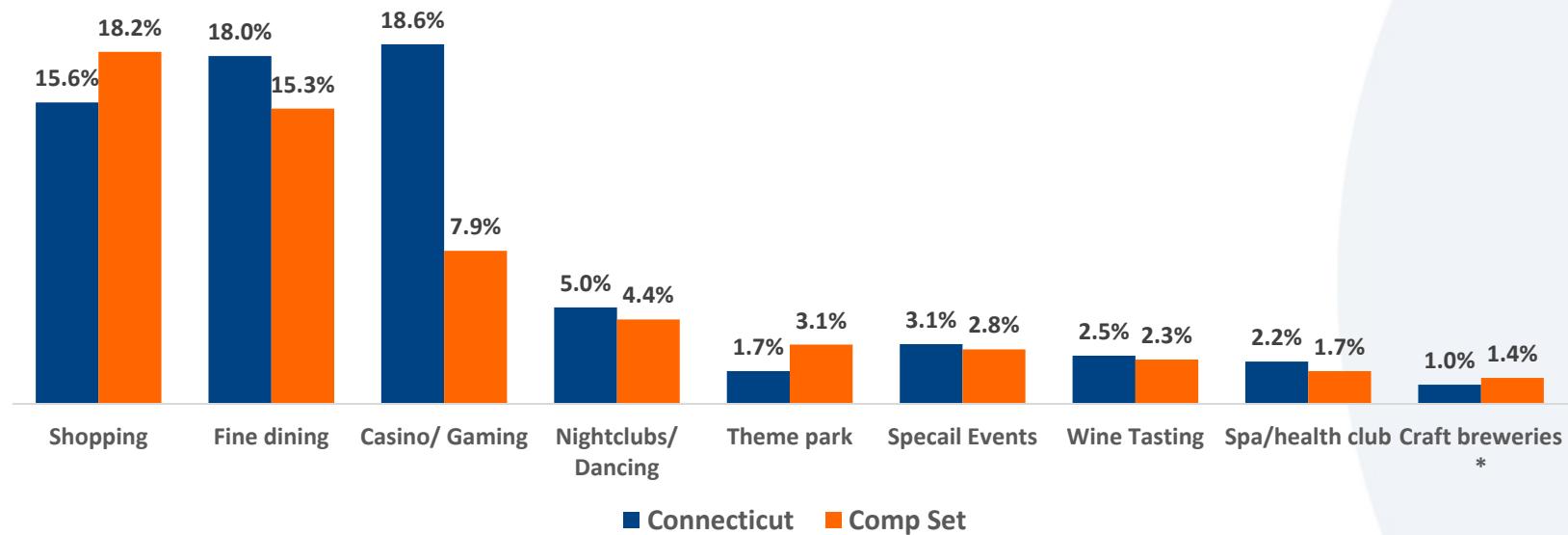
SOURCE: TNS Travels America 2013

Activity Participation: Nature/Outdoor Activities



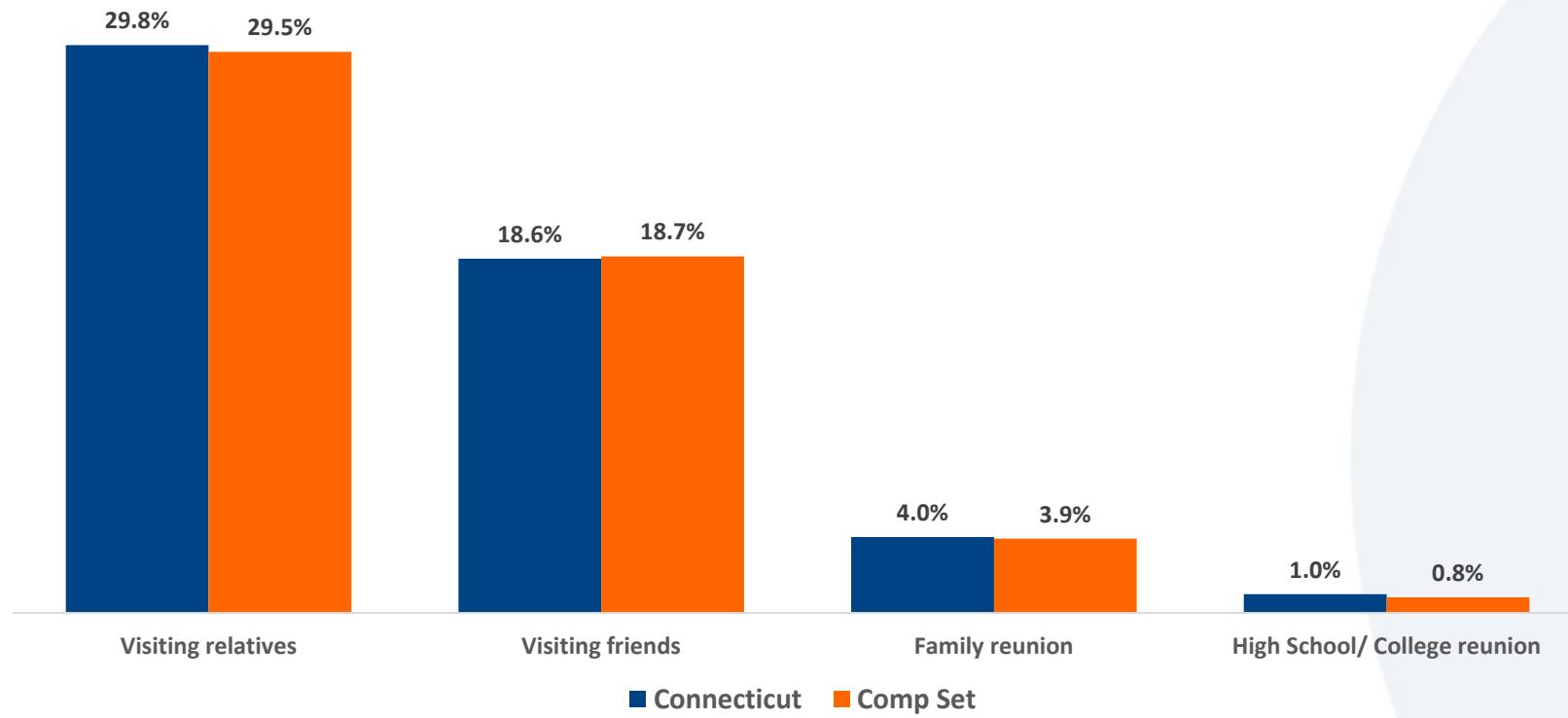
SOURCE: TNS Travels America 2013

Activity Participation: Entertainment/Amusement



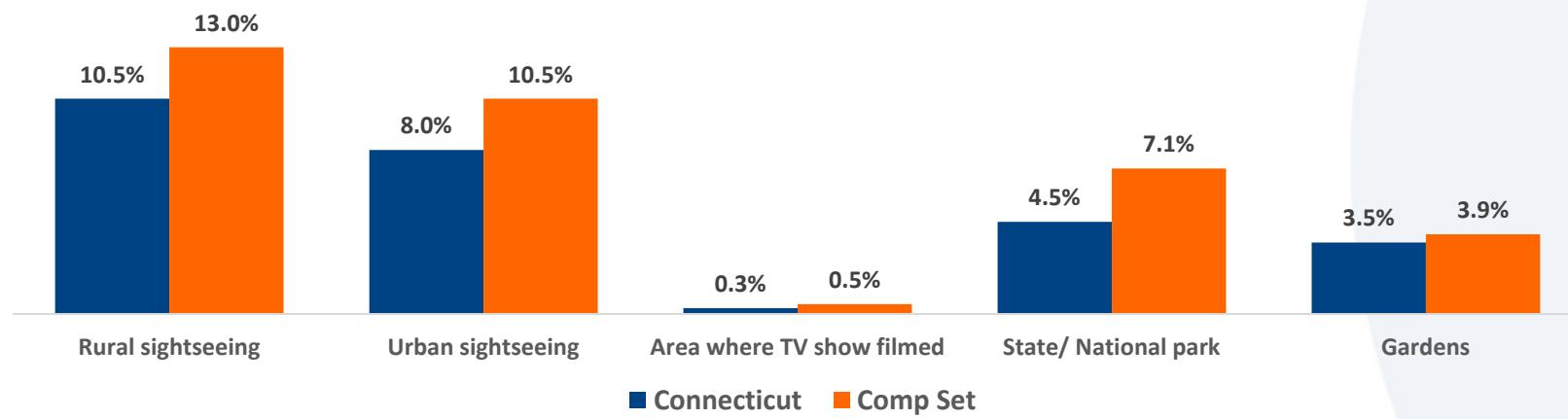
SOURCE: TNS Travels America 2013

Activity Participation: Family Activities/Reunion



SOURCE: TNS Travels America 2013

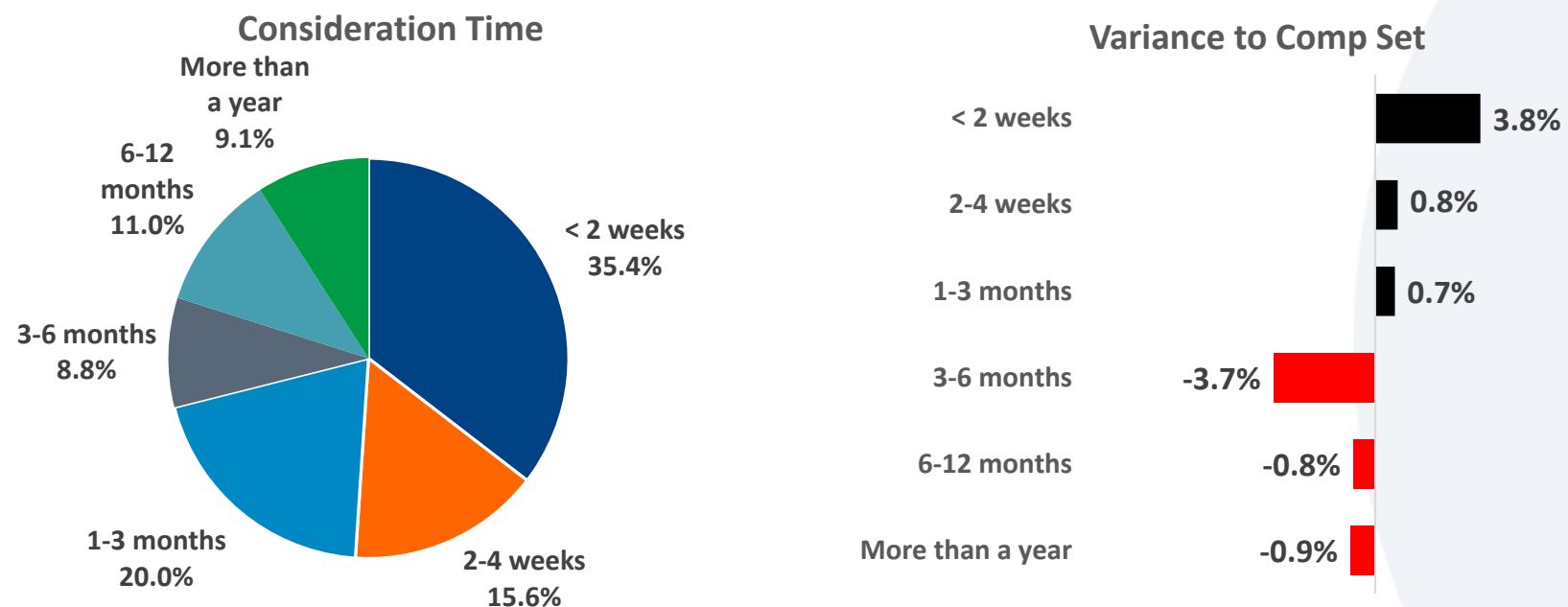
Activity Participation: Other



SOURCE: TNS Travels America 2013

Consideration Time*

The total amount of time Connecticut travelers spend considering where they would visit averaged 94.4 days, about 10 fewer days than the comp set's 104.1 average.



SOURCE: TNS Travels America 2013

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

Decision Time*

Average decision time for Connecticut travelers was 74.8 days (or amount of time elapsed between when the decision was made and the trip occurred), about 6 fewer days than the comp set's 80.9 average.

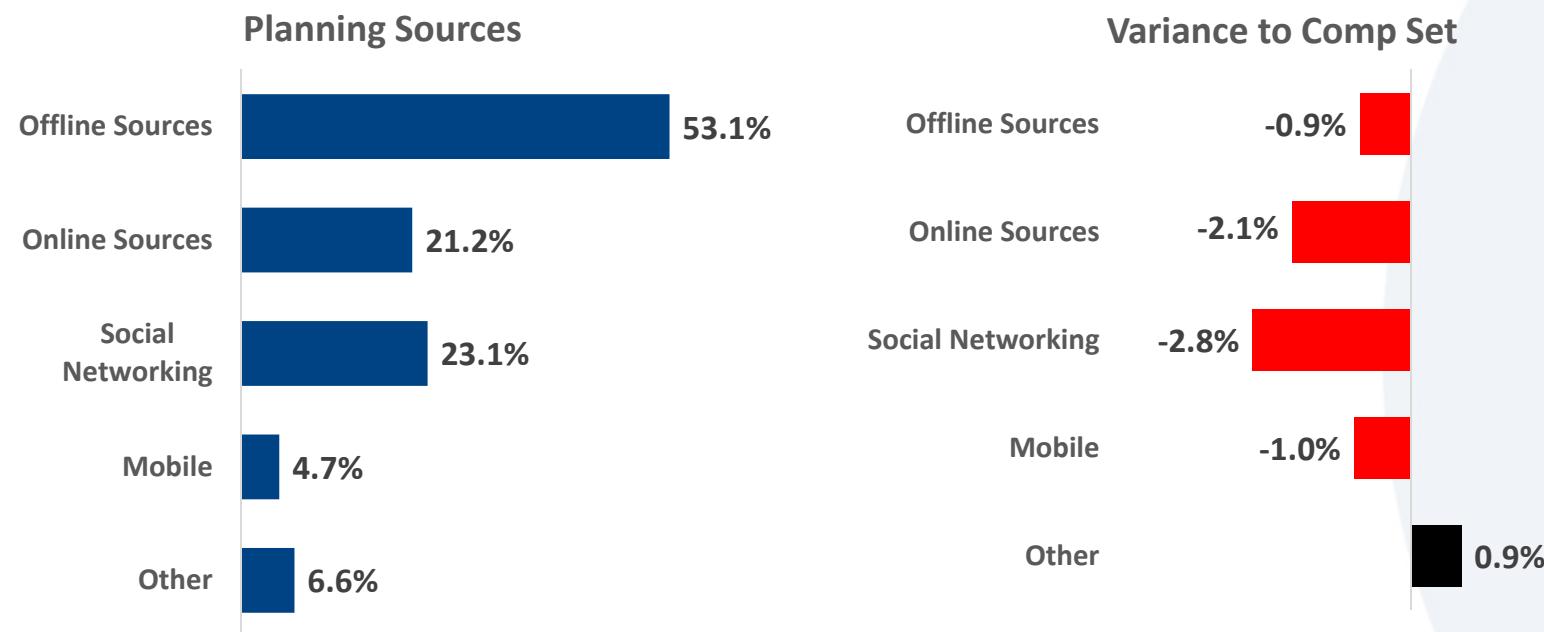


SOURCE: TNS Travels America 2013

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

Sources Used to Plan Trip

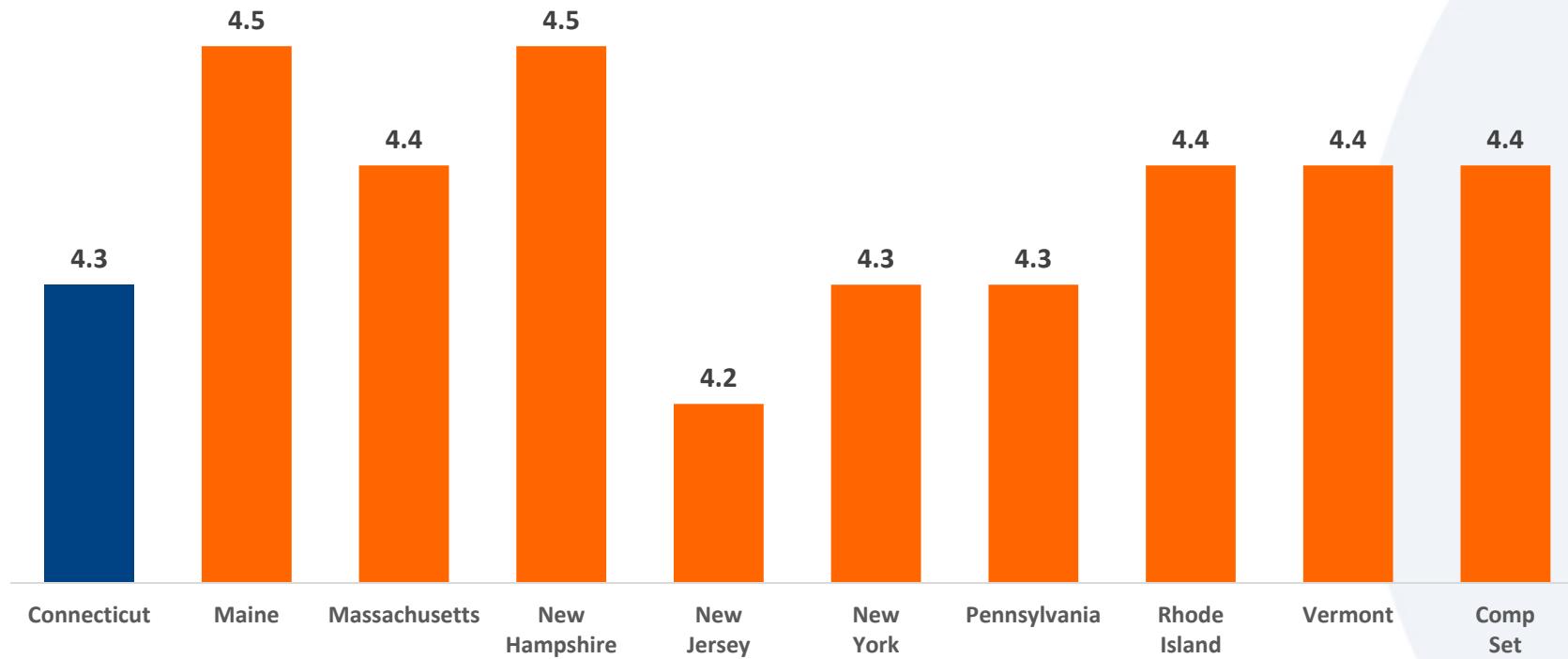
More than half of Connecticut travelers used offline resources to plan their trips while 21% used online sources and 23% used social media including travel review sites like TripAdvisor.com.



SOURCE: TNS Travels America 2013

Visitor Satisfaction (Average on 5-Point Scale)

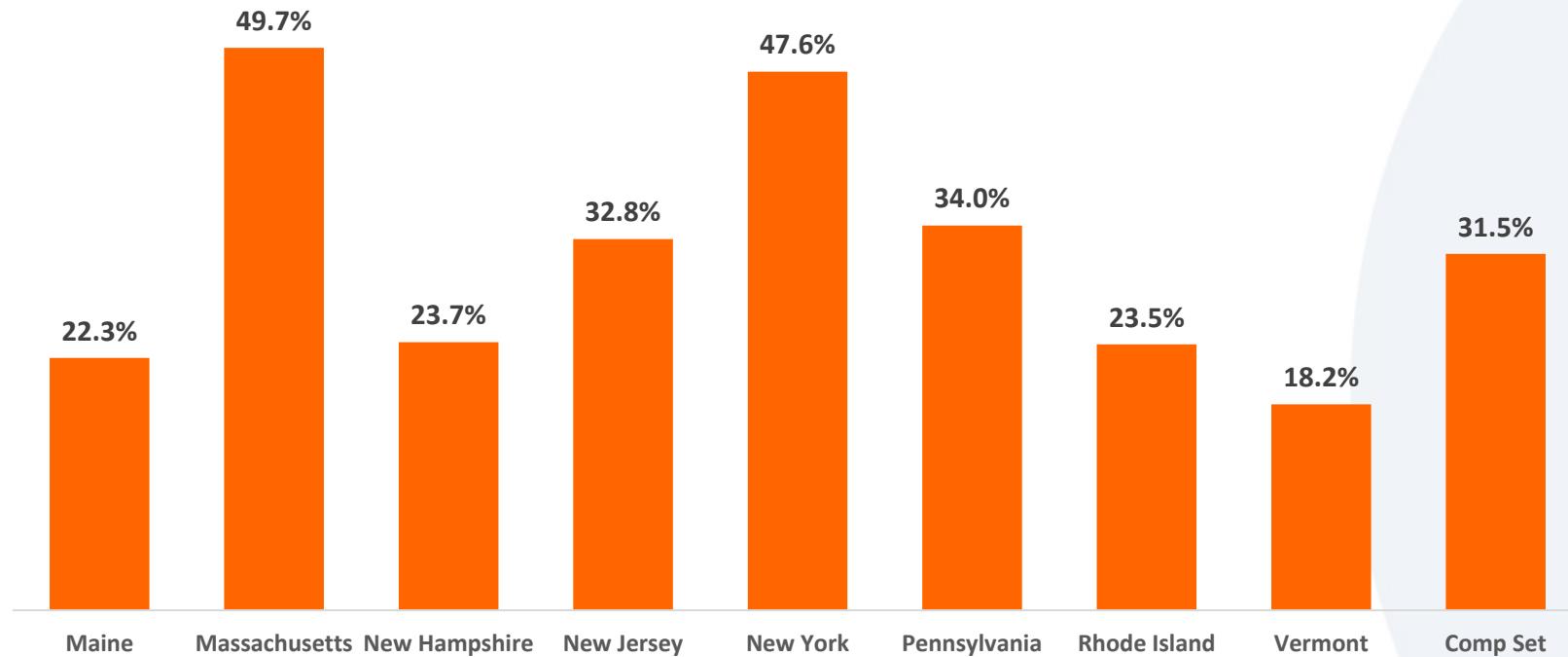
Connecticut travelers reported average satisfaction of 4.3 on a 5-point scale which is considered good by industry standards. However, it is slightly lower than that of the comp set as a whole.



SOURCE: TNS Travels America 2013

Other States Connecticut Travelers Visit

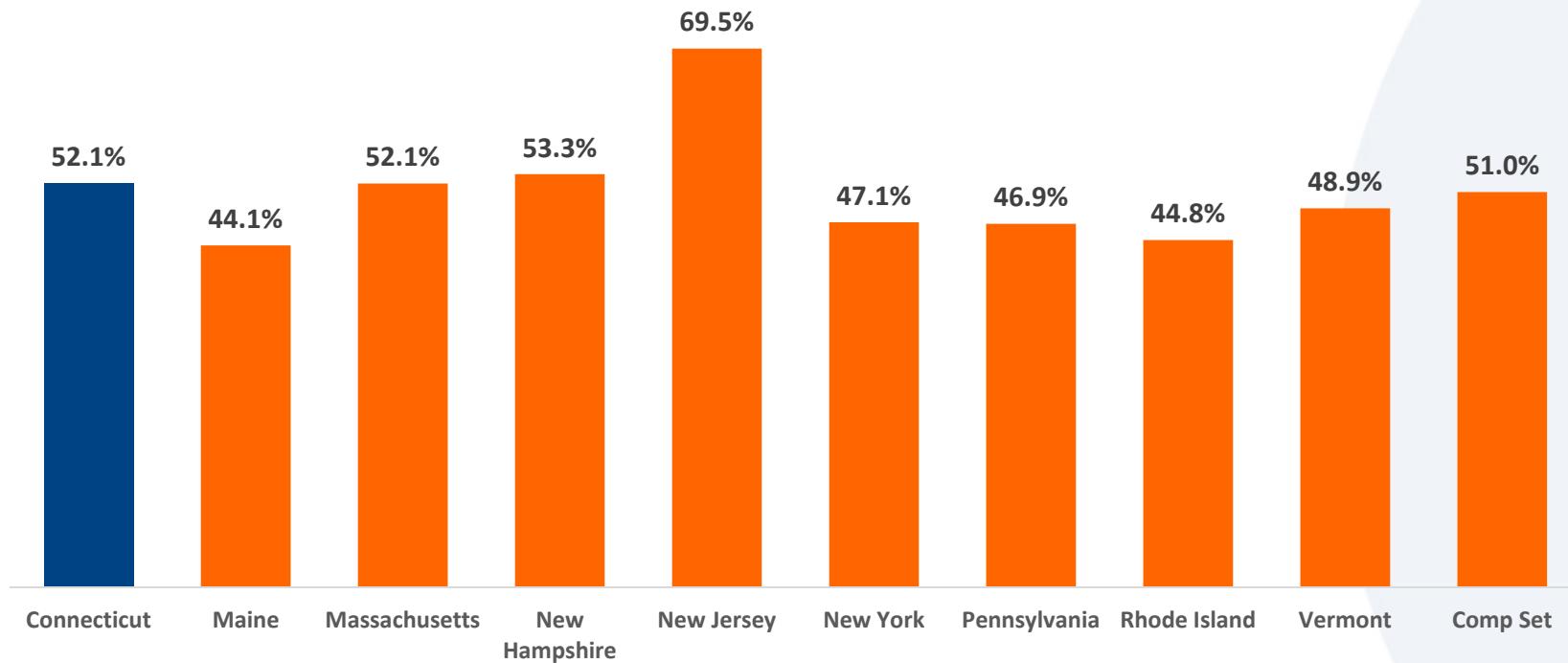
Connecticut travelers also visit other states in the region. In addition to Connecticut, they are most likely to visit Massachusetts and New York.



SOURCE: TNS Travels America 2013

Intent to Visit in Next 2 Years by Each State's Own Travelers

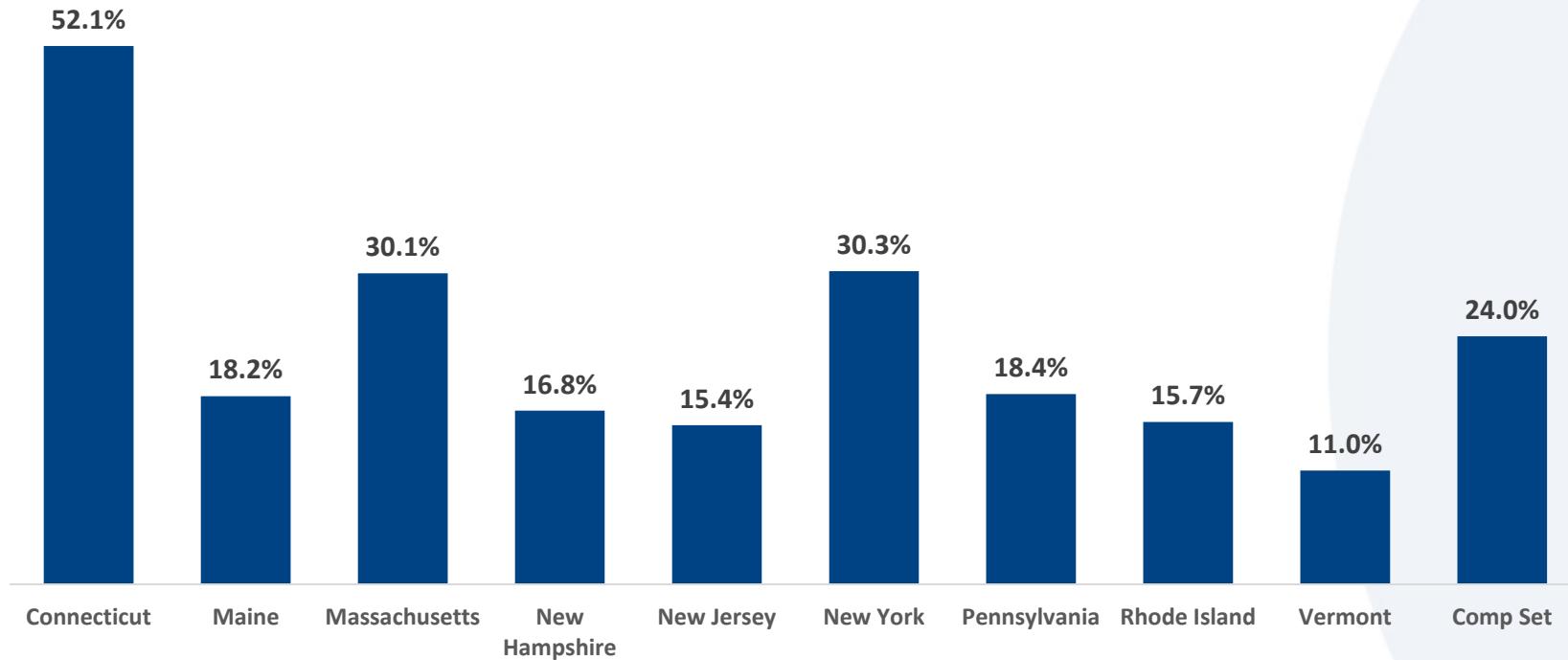
Looking forward, more than half (52%) of Connecticut travelers say they are likely to visit the state again in the next 2 years—slightly higher than the average for the comp set as a whole (51%).



SOURCE: TNS Travels America 2013

States That Connecticut Travelers Plan to Visit in the Next 2 Years

As one might expect, Connecticut travelers are more likely to return to Connecticut than they are to visit any other state. The states that Connecticut travelers are most likely to visit are New York and Massachusetts.



SOURCE: TNS Travels America 2013

Household Income

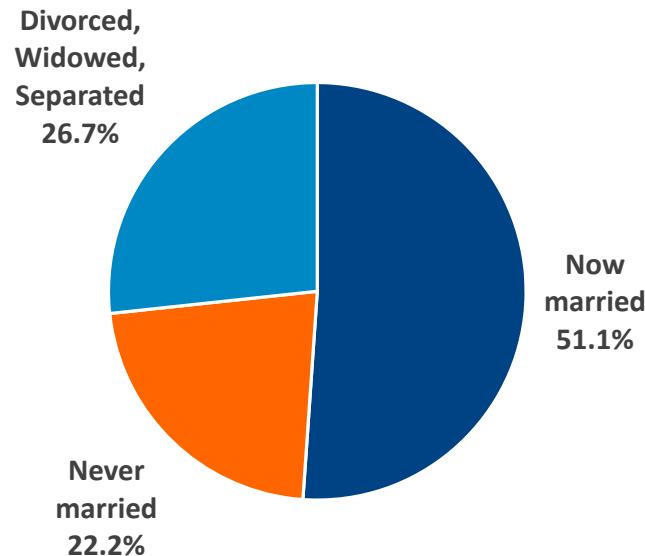
The average Connecticut traveler earned \$73.9k in 2013, \$4.8k or 6% more than the comp set average as a whole.



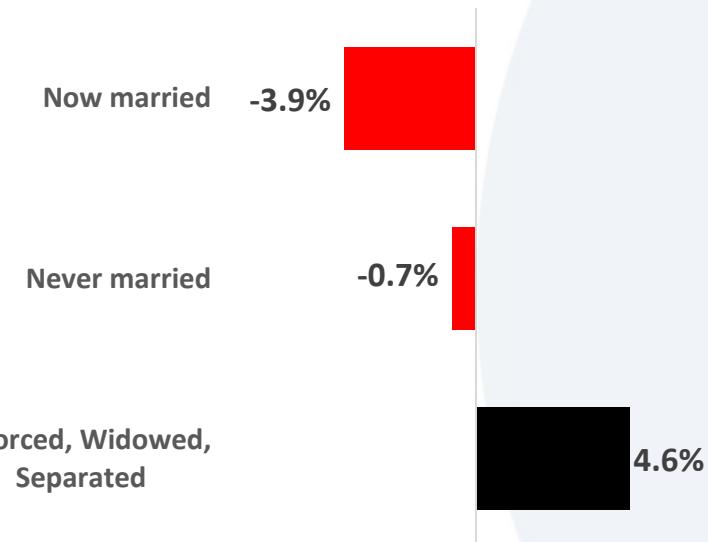
Marital Status

More than half of Connecticut travelers are married while 27% are divorced/widowed/separated.

Marital Status



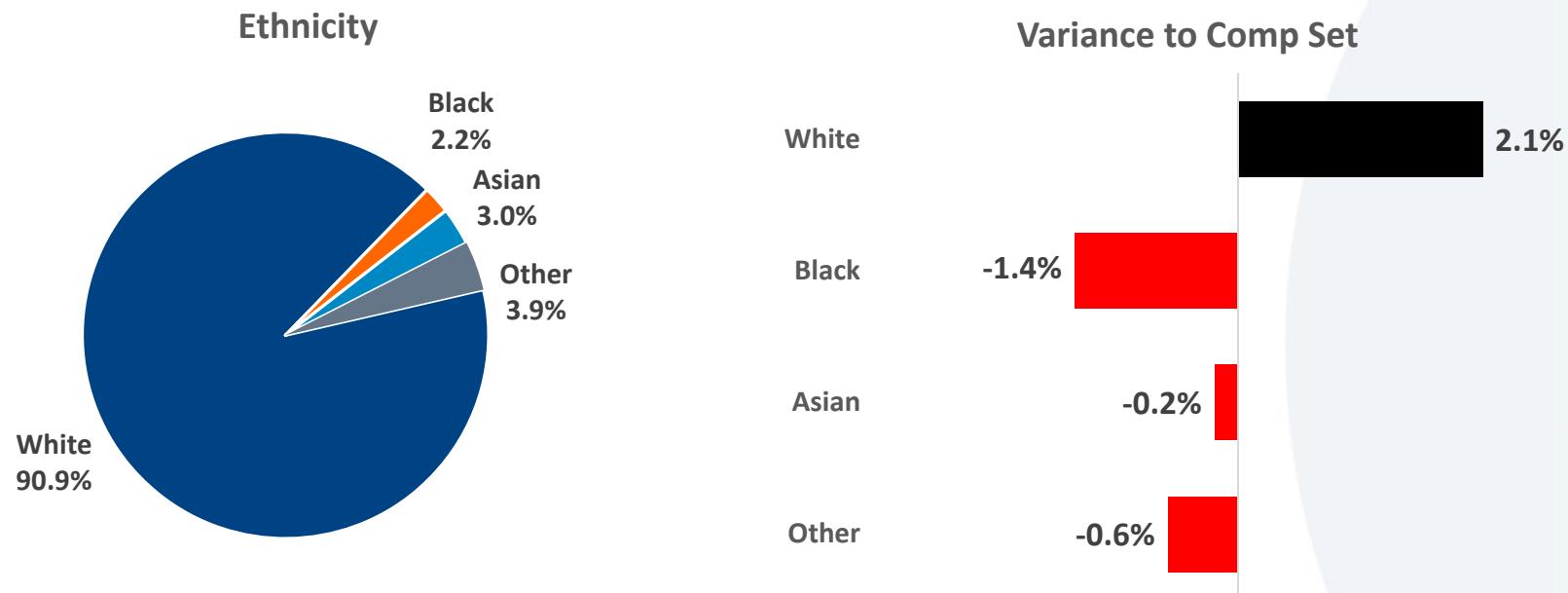
Variance to Comp Set



SOURCE: TNS Travels America 2013

Ethnicity

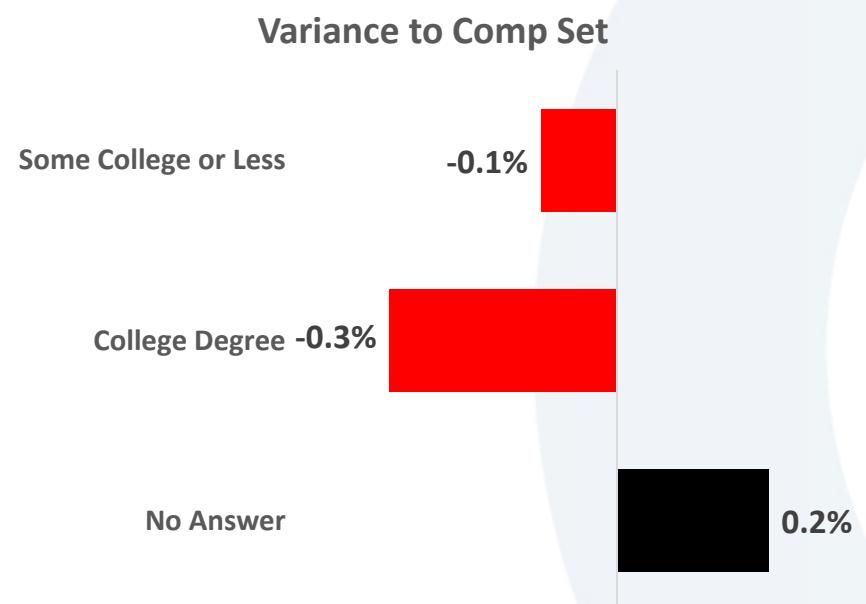
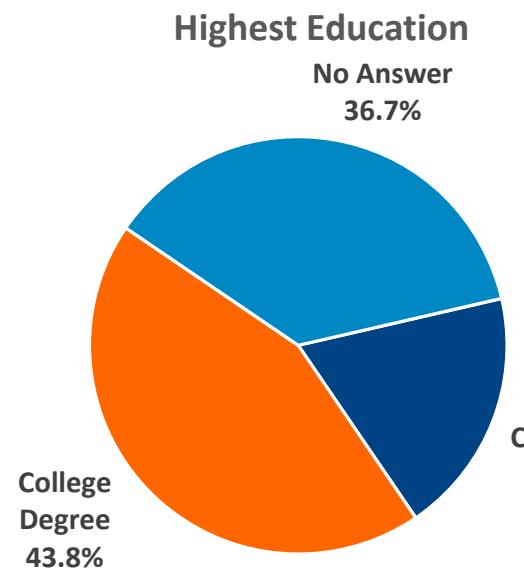
More than 90% of Connecticut visitors are Caucasian, +2.1% compared to the comp set's average.



SOURCE: TNS Travels America 2013

Education

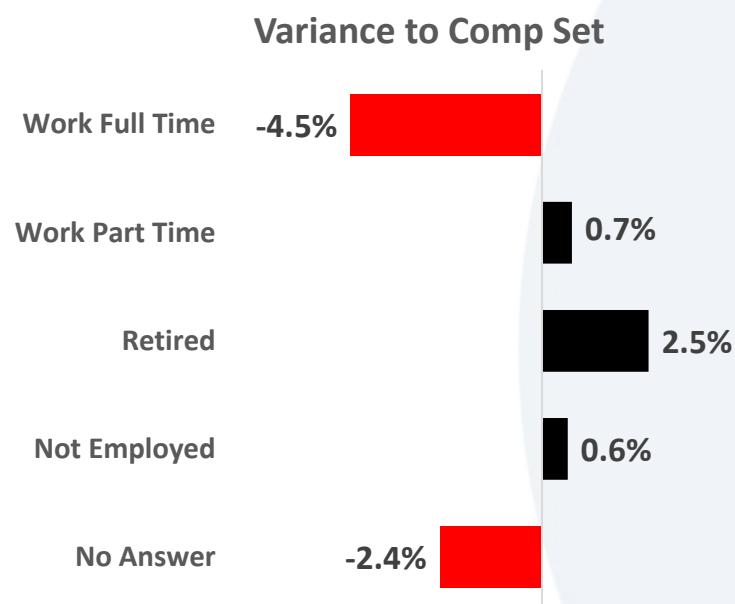
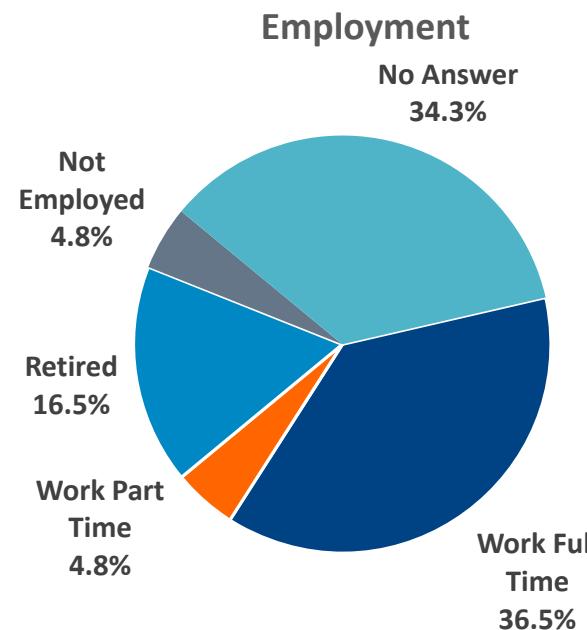
The majority of respondents willing to answer the education question indicated they had a college degree or better.



SOURCE: TNS Travels America 2013

Employment (Adult Male, Else Female)

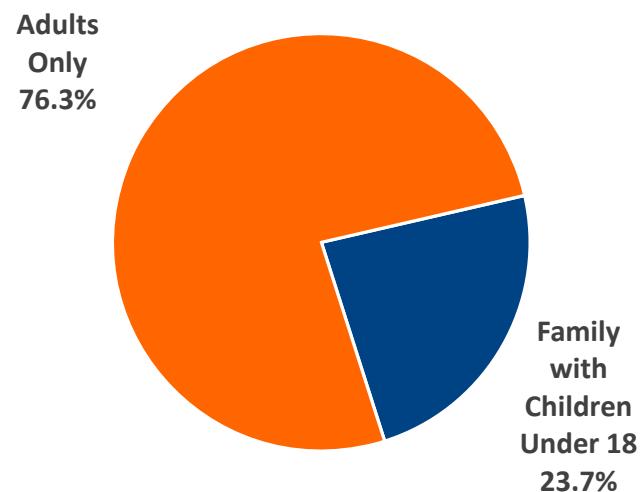
Similarly, the majority of respondents willing to answer this question said they worked full-time.



Families with Children

Families with children accounted for nearly 24% of Connecticut visitors in 2013, 5% less than the competitive set as a whole.

Presence of Children



Variance to Comp Set

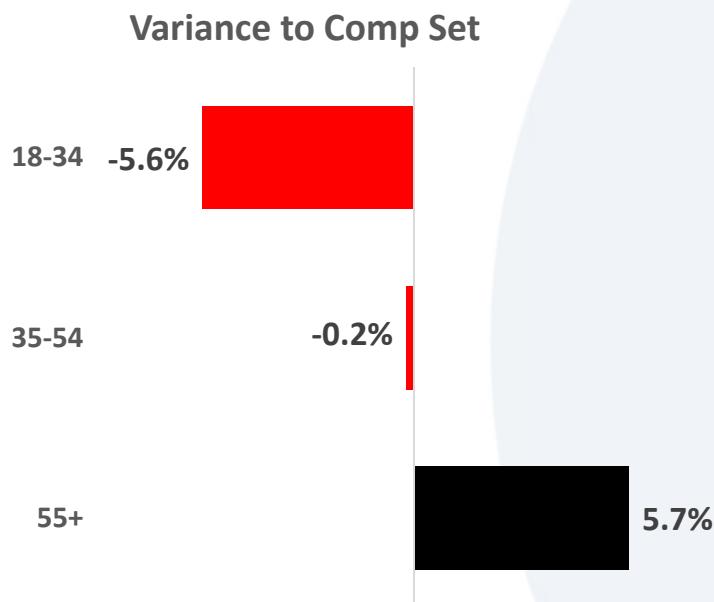
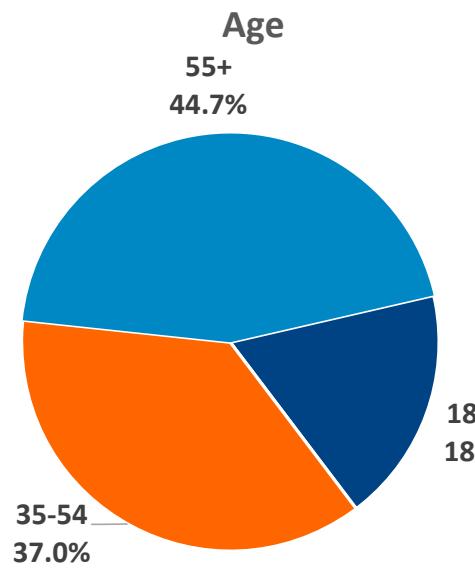
Family with Children Under 18 -5.1%

Adults Only

5.1%

Age of Respondent

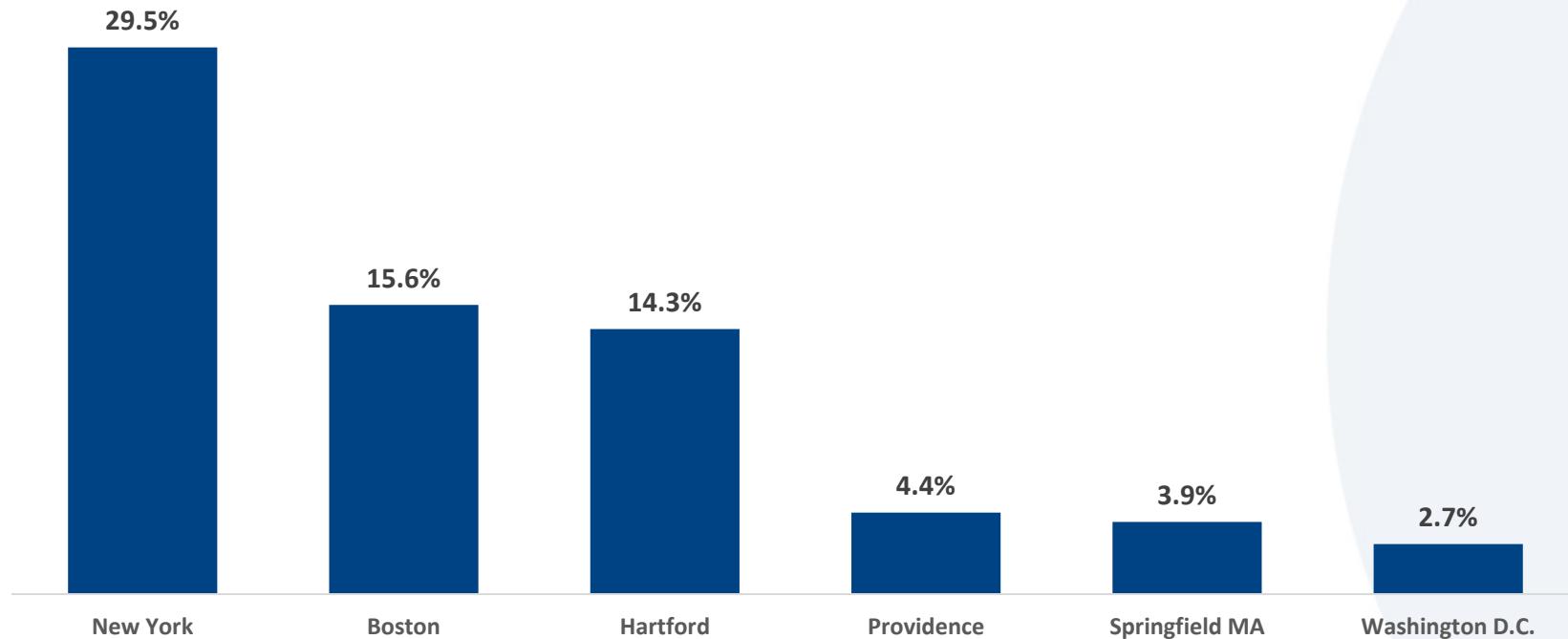
The average adult visitor to Connecticut in 2013 was 51.4 years of age, 2.6 years older than the comp set's average of 48.8 years



SOURCE: TNS Travels America 2013

Connecticut's Top 10 Feeder Markets (DMAs)

More than 70% of Connecticut's 2013 visitors came from 6 markets and more than half came from the top 3 DMAs. New York City is by far the largest feeder market of the State of Connecticut.



SOURCE: TNS Travels America 2013

Thank You!



jhenry@h2rmarketresearch.com

bmowris@h2rmarketresearch.com



417.877.7808



1717 E Republic Road, Suite C
Springfield, MO 65804



[@H2RMktResearch](https://twitter.com/H2RMktResearch)



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