2025

Economic Impact of Visitors to Connecticut

TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

Published June 2026

Draft – Not for Distribution

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Introduction

Visitors are integral to Connecticut's economy, generating significant financial benefits for residents and local businesses. Visitor activity also produces substantial tax revenue which supports government services.

Credible measurements of the visitor economy are designed to inform policy decisions that foster the sector's development.

To quantify the significance of Connecticut's visitor economy, Tourism Economics developed a comprehensive analysis of visitor spending and its total economic impact on businesses, employment, personal income, and taxes. At a high level, our approach includes the following stages:

- Compilation of visitor statistics
- Compilation of industry data
- Compilation of government data
- Analysis of visitor spending by category
- Economic impact modeling

KEY FINDINGS

Key Findings

Visitors Generate Significant Economic Impact

In 2025, **72.2 million visitors spent $12.3 billion** in the Connecticut economy, representing increases of 3.1% and 6.4%, respectively. Visitor spending generated a total economic impact of **$20.1 billion.**

72.2M VISITORS TO CONNECTICUT

$12.3B VISITOR SPENDING

$20.1B TOTAL ECONOMIC IMPACT

$7.1B TOTAL PERSONAL INCOME

125,167 TOTAL JOBS SUPPORTED

$1.6B STATE AND LOCAL TAXES

Results in Context

The visitor economy is an economic pillar in Connecticut. In 2025, visitor spending supported one-in-19 jobs in Connecticut. In addition:

$12.3B VISITOR SPENDING

Visitors spent $33.7 million per day, on average, in Connecticut.

$7.1B PERSONAL INCOME

This is the equivalent of $4,959 per resident household, regardless of any connection to the visitor economy.

125,167 JOBS

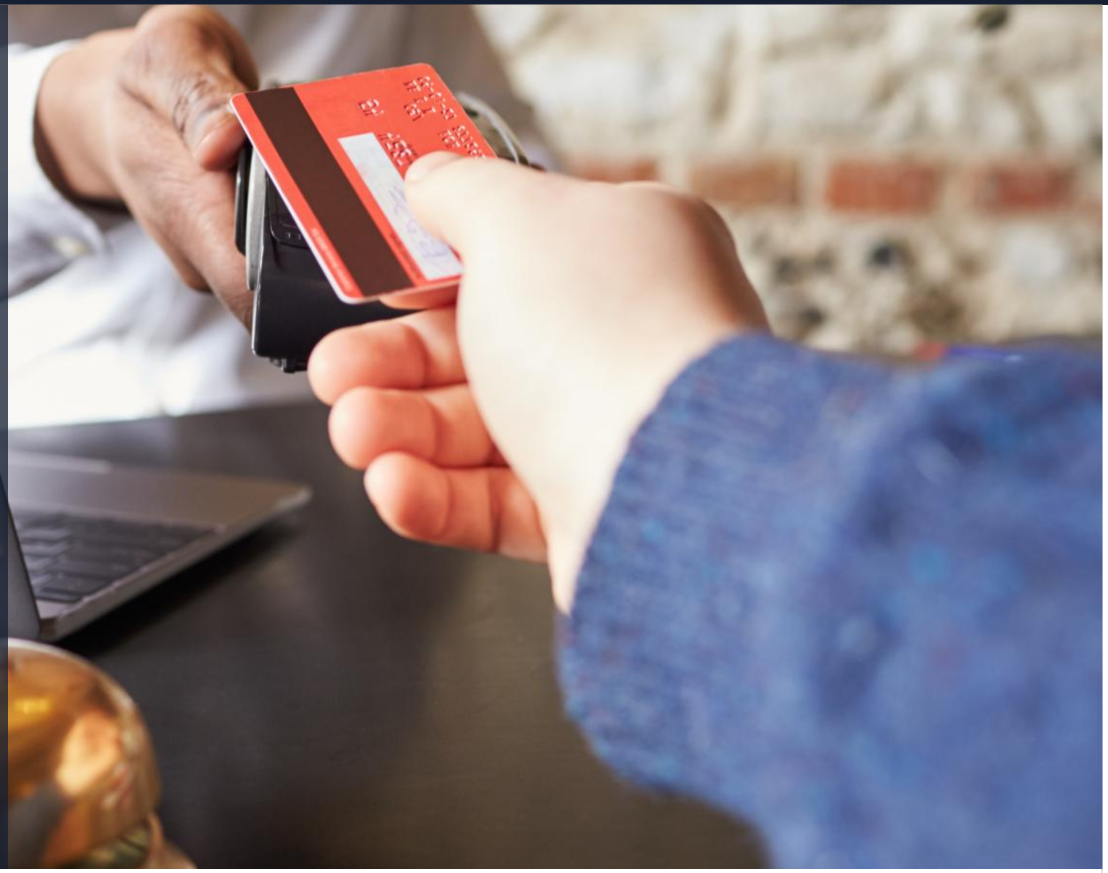
The visitor economy sustained 5.3% of all jobs in Connecticut. These employees could fill Pratt & Whitney Stadium at Rentschler Field more than three times.

$1.6B STATE & LOCAL TAXES

Each household would need to be taxed an additional $1,097 to replace the visitor-generated taxes received by Connecticut state and local governments in 2025.

VISITOR VOLUME & SPENDING

Connecticut welcomed **72.2 million** visitors who spent **$12.3 billion** in 2025.

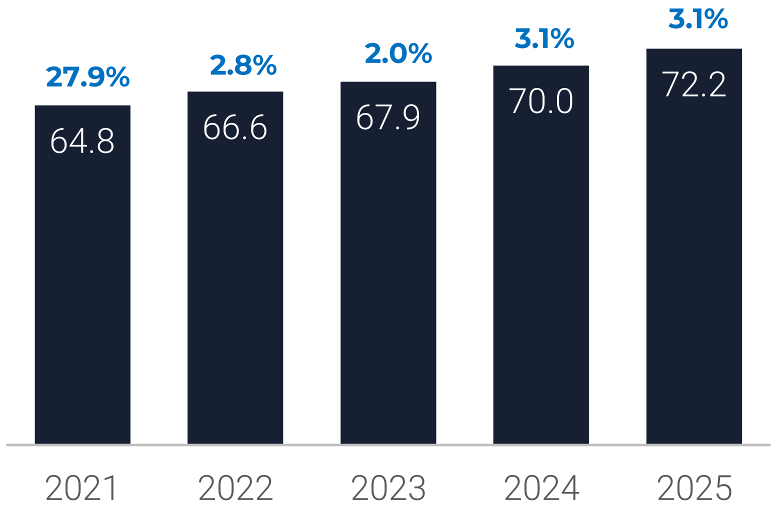


Visitor Volume

In 2025, 72.2 million visitors traveled to Connecticut, a solid increase over the prior year (+3.1%). The day segment slightly outpaced overnight, growing 3.2% compared to 3.1%. Among domestic visitors, travel rose 3.2%, while international overnight visitation declined 7.7%.

Connecticut Visitor Volume

millions



Source: Tourism Economics

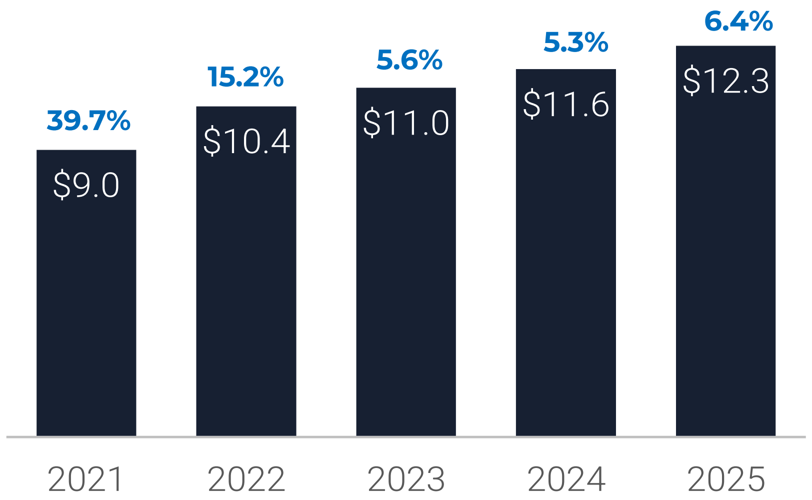
Visitor Spending

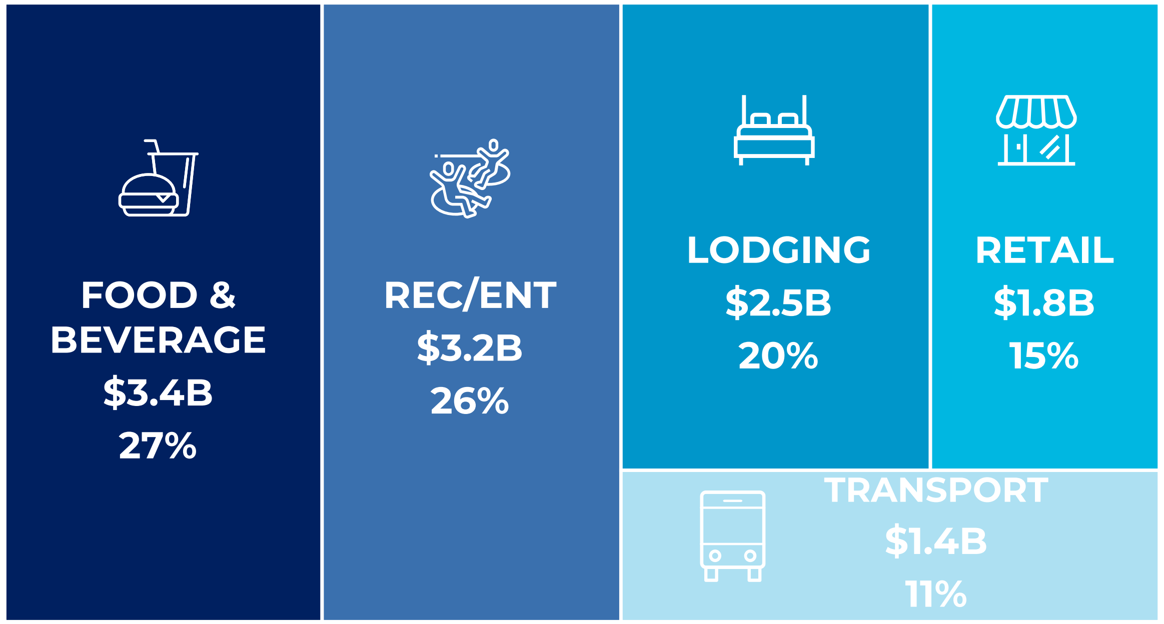
Visitor spending increased 6.4% in 2025, reaching $12.3 billion.

Of the $12.3 billion spent, food and beverage purchases accounted for $3.4 billion—27% of all visitor spending. Visitors spent 26% of their budget on recreation, including spending at casinos.

Connecticut Visitor Spending

$ billions





Source: Tourism Economics

Note: Lodging includes all accommodation types, and transportation includes both ground and air transportation. Recreation includes spending at casinos.

Visitor Volume and Spending Trends

Visitor spending increased 6.4% in 2025, driven primarily by robust domestic visitor demand and the impact of higher prices.

Food and beverage led all spending categories in 2025, both in overall spending levels and growth, with expenditures rising 7.4% year-over-year. Recreation and retail spending also posted strong gains, increasing 6.7% and 6.4%, respectively.

Visitor volume expanded 3.1% in 2025, fueled solely by the domestic market. International visitors, who represent less than 1% of total visitors, declined 7.7% over the same period.

For context, Connecticut's performance compared favorably to national trends. Domestic visitor volume grew 1.5% across the US in 2025, while visitor spending rose 1.9%–well below Connecticut's gains of 3.1% and 6.4%, respectively.

Connecticut Visitor Spending
$ millions

	2021	2022	2023	2024	2025	2025 Growth
Total visitor spending	**$9,023**	**$10,398**	**$10,976**	**$11,561**	**$12,298**	**6.4%**
Food and beverage	$2,440	$2,796	$2,954	$3,147	$3,380	7.4%
Recreation	$2,408	$2,695	$2,855	$2,985	$3,185	6.7%
Lodging	$1,631	$2,070	$2,224	$2,351	$2,489	5.9%
Retail	$1,479	$1,591	$1,644	$1,732	$1,842	6.4%
Transportation	$1,065	$1,247	$1,298	$1,346	$1,401	4.1%

Source: Tourism Economics

Note: Lodging includes all accommodation types, and transportation includes both ground and air transportation. Recreation includes spending at casinos.

Connecticut Visitor Volume and Spend, By Market
millions of visitors, $ millions, $ per person

	2021	2022	2023	2024	2025	% y/y
Total visitors	**64.78**	**66.60**	**67.90**	**70.04**	**72.24**	**3.1%**
Domestic	64.66	66.33	67.52	69.62	71.85	3.2%
International*	0.12	0.27	0.38	0.42	0.39	-7.7%
Total visitor spending	**$9,023**	**$10,398**	**$10,976**	**$11,561**	**$12,298**	**6.4%**
Domestic	$8,853	$10,025	$10,473	$10,932	$11,681	6.9%
International*	$171	$373	$503	$629	$617	-2.0%
Per visitor spending	**$139**	**$156**	**$162**	**$165**	**$170**	**3.1%**
Domestic	$137	$151	$155	$157	$163	3.5%
International*	$1,434	$1,393	$1,335	$1,503	$1,596	6.2%

*2025 international volumes and spend are considered preliminary

Source: Tourism Economics

Connecticut Visitor Volume and Spend, by Segment and Market (2025)
millions, $ billions

Purpose		Stay		Market	
Leisure	67.70	Day	48.64	Domestic	71.85
Business	4.53	Overnight	23.59	International*	0.39
Total	**72.24**	**Total**	**72.24**	**Total**	**72.24**
		Share			
Leisure	93.7%	Day	67.3%	Domestic	99.5%
Business	6.3%	Overnight	32.7%	International*	0.5%

Purpose		Stay		Market	
Leisure	$11.22	Day	$4.55	Domestic	$11.68
Business	$1.08	Overnight	$7.75	International*	$0.62
Total	**$12.30**	**Total**	**$12.30**	**Total**	**$12.30**
		Share			
Leisure	91.2%	Day	37.0%	Domestic	95.0%
Business	8.8%	Overnight	63.0%	International*	5.0%

*2025 international volumes and spend are considered preliminary

Source: Tourism Economics

ECONOMIC IMPACT METHODOLOGY

Economic Impact Methodology

The development of visitor economy impact modeling begins with a comprehensive demand side analysis. Visitor survey data provides estimates on the volume of visitors by type and their spending in specific industries (e.g. lodging, restaurants, retail, recreation and entertainment, transportation). These estimates are strengthened through an analysis of industry-specific data sets on the lodging industry, aviation, and sectoral-level business sales. Government data, including taxes by type, as well as employment and personal income by industry, are used to supplement and confirm demand-side visitor spending calculations.

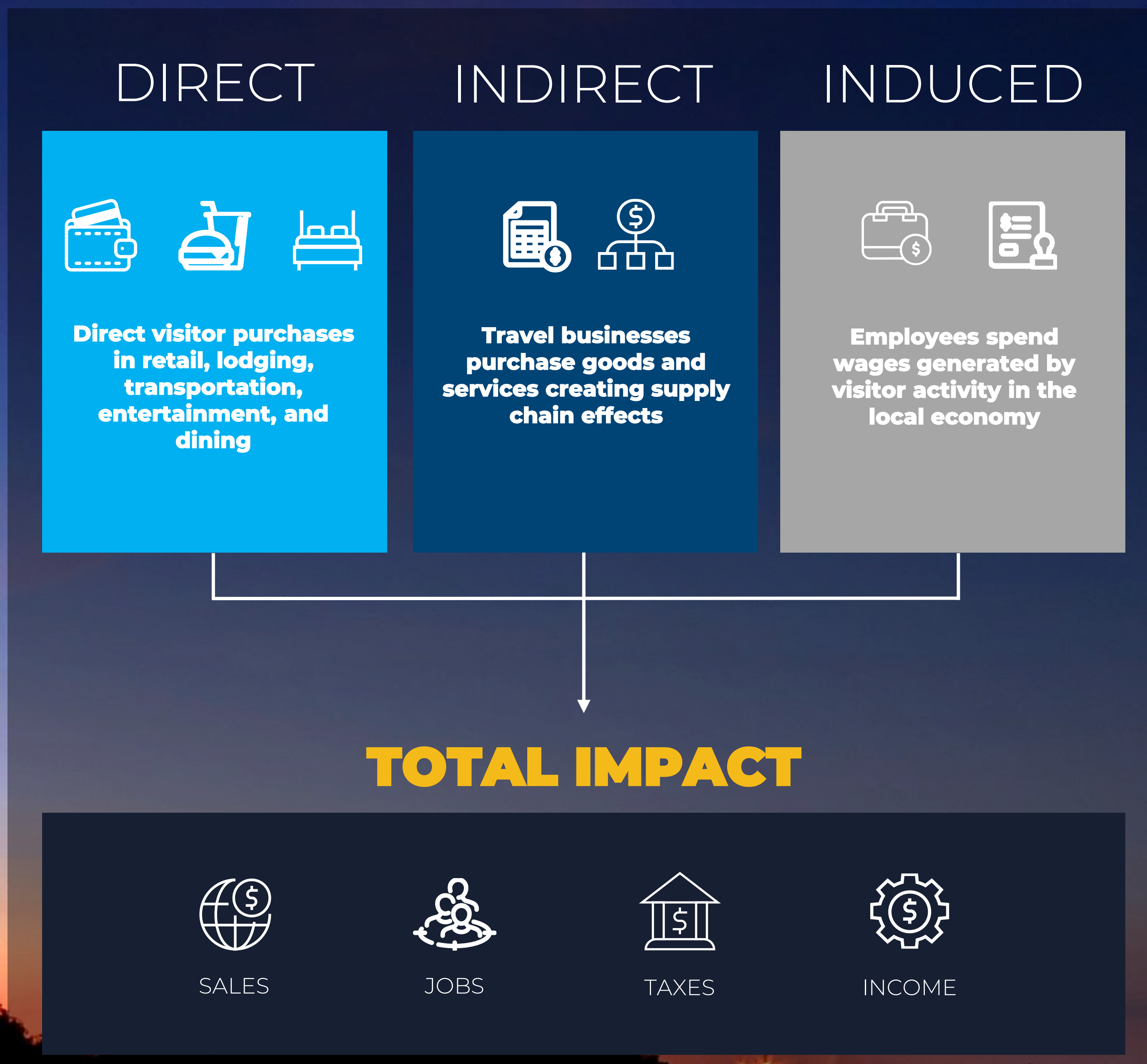
This provides a detailed profile of visitor spending by industry, which is then connected to a local input-output (I-O) economic impact model constructed within the IMPLAN platform. This uses government (Bureau of Economic Analysis and Census) data to trace the flow of visitors through the local economy and its effects on businesses, households, and government. The model quantifies three levels of impact:

1. **Direct impacts:** Visitor spending creates direct economic value within a defined set of sectors. This supports a proportion of spending, jobs, wages, and taxes within each sector.
2. **Indirect impacts:** Businesses providing direct services to visitors purchase goods and services, generating additional impacts called indirect impacts or supply-chain effects.
3. **Induced impacts:** Additional business activity is generated as employees spend incomes locally that are earned due to visitor activity. This is called the induced impact or income effect.

The model calculates these three levels of impact—direct, indirect and induced—for the following metrics:

- Spending
- Wages
- Employment
- Federal Taxes
- State Taxes
- Local Taxes

Economic Impact Model



TOURISM ECONOMICS

ECONOMIC IMPACT

Business Sales Impacts

Visitors spent $12.3 billion in Connecticut in 2025. These direct impacts generated an additional $7.8 billion through supply chain (indirect) and income (induced) effects.

As a result, the total economic impact of visitors reached $20.1 billion in 2025, 3.4% ahead of the prior year.

$12.3B Visitor Spending *(Direct Sales)* **+** **$3.2B** Indirect Sales **+** **$4.6B** Induced Sales **=** **$20.1B** Total Economic Impact

Business Sales by Industry (2025)

$ millions

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	**$12,298**	**$3,220**	**$4,599**	**$20,117**
Finance, Insurance and Real Estate	$641	$881	$1,592	$3,113
Retail Trade	$2,622	$19	$348	$2,989
Food & Beverage	$2,600	$77	$280	$2,957
Lodging	$2,053	$2	$2	$2,057
Recreation and Entertainment	$1,718	$83	$57	$1,858
Business Services	$69	$1,069	$417	$1,555
Government	$1,205	$78	$50	$1,332
Education and Health Care		$8	$945	$953
Gasoline Stations	$626	$1	$22	$650
Personal Services	$188	$111	$239	$538
Other Transport	$313	$146	$72	$531
Communications		$317	$191	$509
Wholesale Trade		$99	$190	$288
Air Transport	$262	$3	$7	$272
Construction and Utilities		$185	$73	$258
Manufacturing		$131	$109	$240
Agriculture, Fishing, Mining		$12	$6	$17

Source: Tourism Economics

Visitor spending generated a total economic impact of **$20.1 billion.**

GDP (Value Added Impacts)

Connecticut's visitor economy GDP increased to $11.2 billion in 2025. This represented 3.0% of Connecticut's entire economy.

GDP removes the value of all imported (from other states and internationally) goods and services.

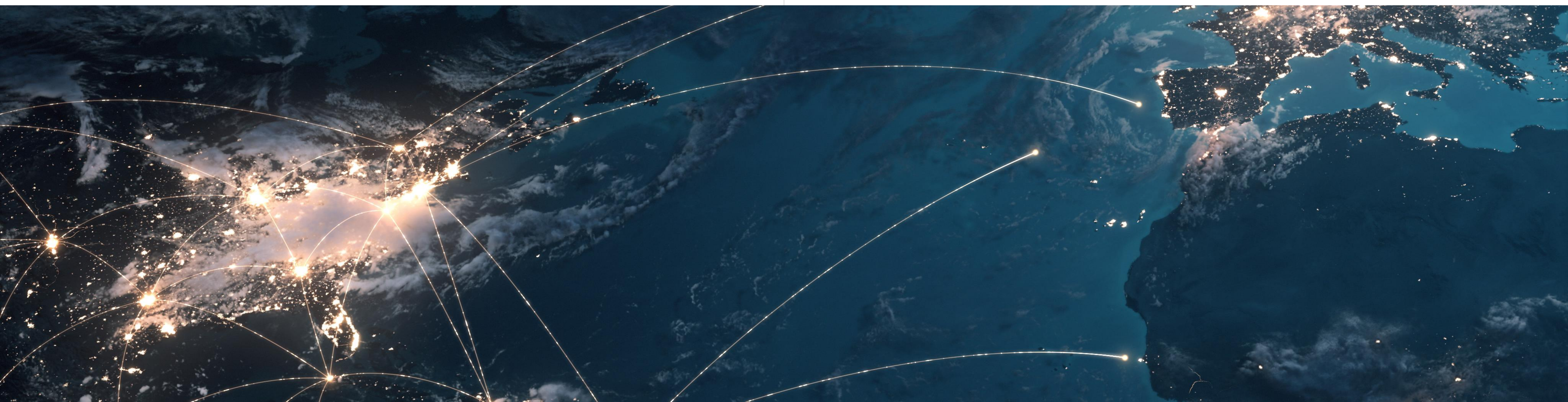
$6.0B Direct GDP + **$2.1B** Indirect GDP + **$3.2B** Induced GDP = **$11.2B** Total GDP

GDP by Industry (2025)

$ millions

	Direct GDP	Indirect GDP	Induced GDP	Total GDP
Total, all industries	**$5,961**	**$2,086**	**$3,164**	**$11,211**
Finance, Insurance and Real Estate	$461	$642	$1,199	$2,302
Food & Beverage	$1,695	$50	$194	$1,939
Lodging	$1,066	$1	$1	$1,069
Business Services	$15	$732	$297	$1,044
Recreation and Entertainment	$899	$42	$35	$976
Government	$845	$50	$21	$916
Retail Trade	$437	$11	$230	$678
Education and Health Care		$4	$639	$643
Personal Services	$173	$70	$132	$376
Other Transport	$197	$75	$37	$309
Communications		$162	$107	$268
Wholesale Trade		$79	$159	$238
Construction and Utilities		$113	$49	$162
Air Transport	$102	$1	$3	$107
Manufacturing		$49	$42	$90
Gasoline Stations	$70	$1	$16	$87
Agriculture, Fishing, Mining		$6	$3	$9

Source: Tourism Economics



Direct Employment

Employment directly supported by visitor activity increased 0.7% in 2025, reaching 85,179 jobs.

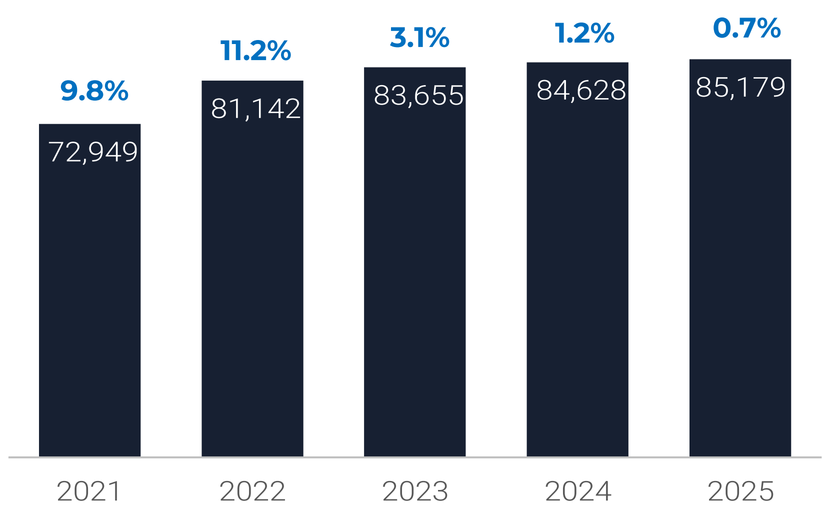
Visitor-supported employment is a significant part of several industries in Connecticut—all of lodging employment, 35% of recreation employment, and 23% of food and beverage jobs are supported by visitor spending.

Overall, direct tourism jobs accounted for about 4% of all jobs in Connecticut in 2025.

If direct visitor-supported employment was treated as a single industry, it would rank 9th in comparison to other comparably measured sectors, behind construction and education.

Visitor-Supported Employment in Connecticut

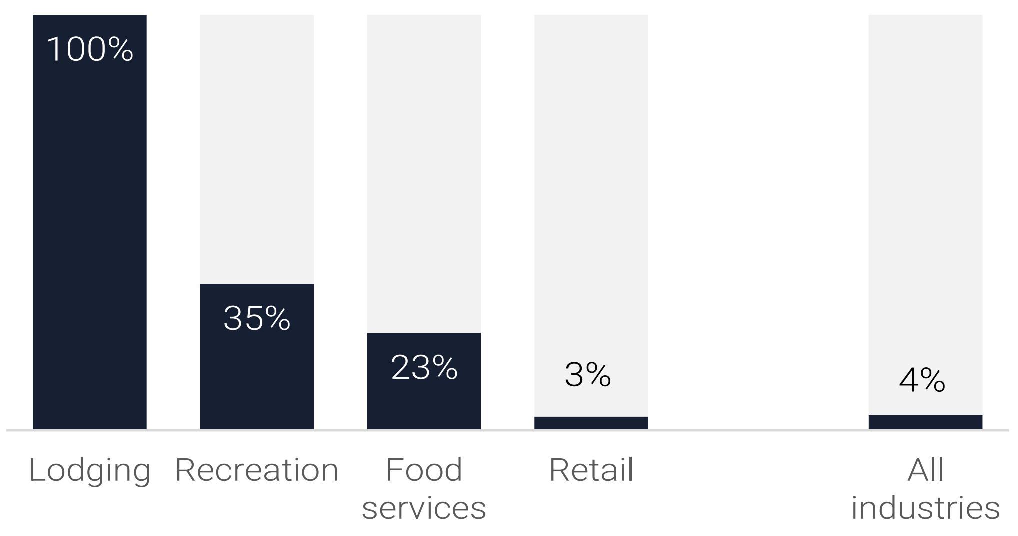
jobs



Source: Tourism Economics

Tourism Employment Intensity

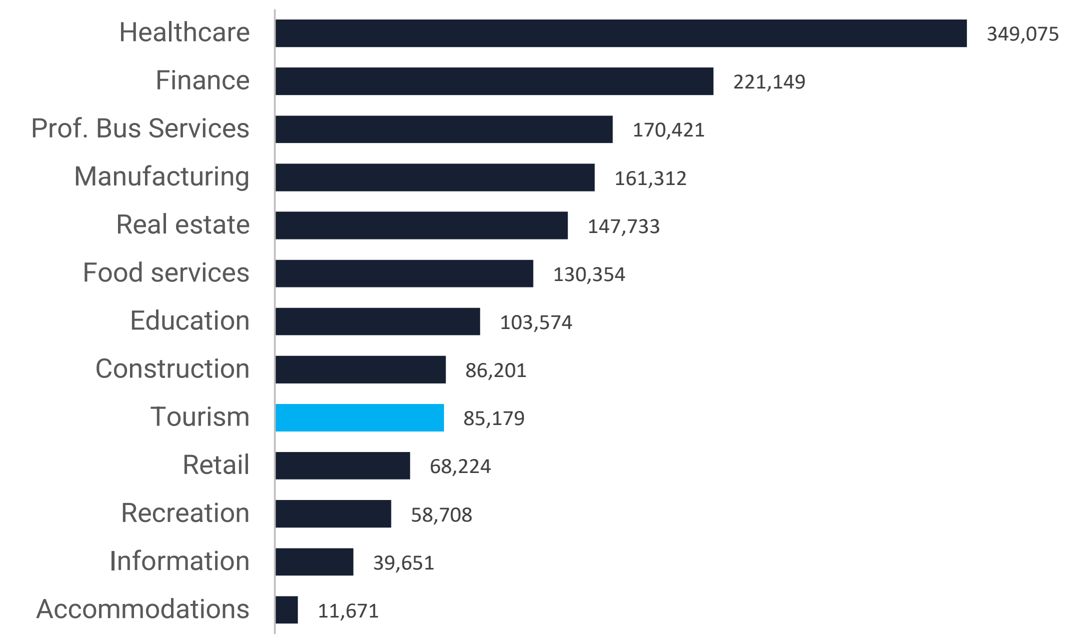
share of total industry employment



Source: Tourism Economics

Employment in Connecticut, by Major Industry

jobs



Source: BEA, BLS, Tourism Economics

Employment Impacts

Visitor activity sustained 85,179 direct jobs in 2025, with an additional 39,988 jobs supported from the indirect and induced impacts of visitor activity. Total employment impacts tallied 125,167 in 2025, translating to one-in-19 jobs in the state.

85.2K Direct Jobs + **15.4K** Indirect Jobs + **24.6K** Induced Jobs = **125.2K** Total Jobs

Employment by Industry (2025)
jobs

	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Total, all industries	**85,179**	**15,423**	**24,566**	**125,167**
Food & Beverage	30,503	930	3,313	34,747
Recreation and Entertainment	21,132	1,388	901	23,421
Lodging	12,728	13	14	12,754
Retail Trade	6,705	129	2,897	9,731
Government	7,605	430	191	8,226
Business Services	85	5,393	2,162	7,640
Education and Health Care		74	7,191	7,265
Finance, Insurance and Real Estate	356	3,158	3,544	7,058
Personal Services	2,563	842	2,294	5,698
Other Transport	2,072	898	468	3,437
Construction and Utilities		820	222	1,042
Air Transport	941	11	28	980
Wholesale Trade		304	622	926
Communications		567	339	906
Gasoline Stations	490	7	114	610
Manufacturing		326	179	505
Agriculture, Fishing, Mining		134	87	222

Source: Tourism Economics

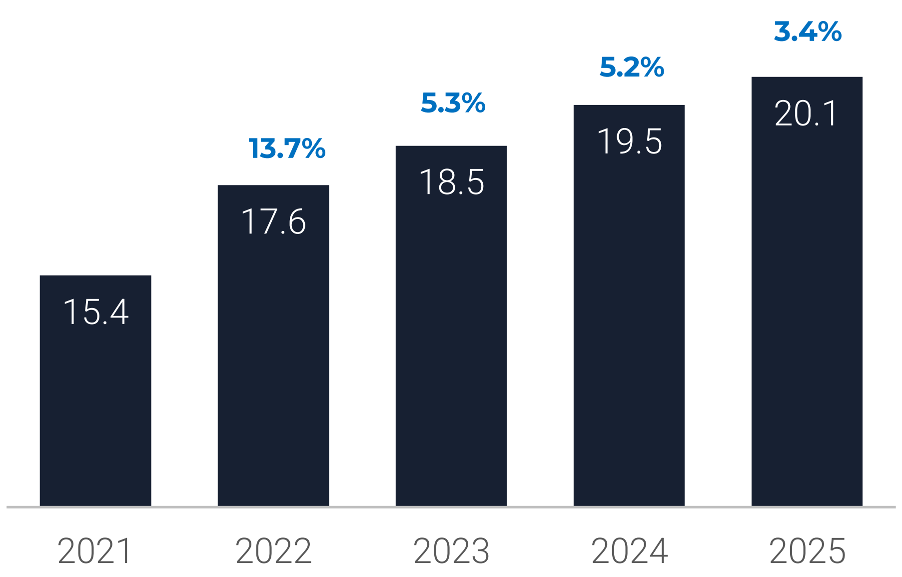
The visitor economy support **one-in-19 jobs** in Connecticut, including nearly 35,000 jobs in the food and beverage industry.

Total Impacts

Total business sales reached $20.1 billion in 2025, an increase of 3.4% over the prior year. Between 2021 and 2025, growth has averaged nearly 7% on an annual basis.

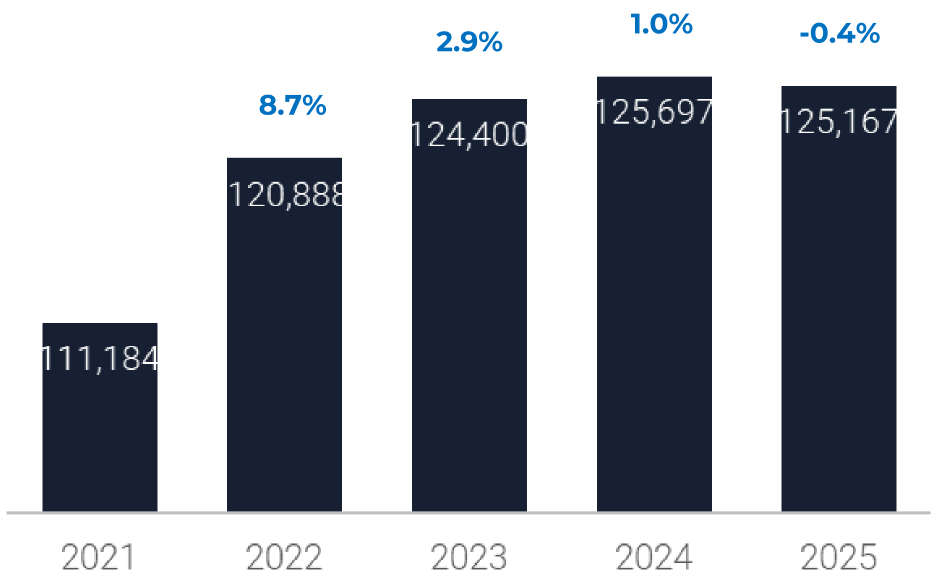
Total visitor-supported employment declined slightly in 2025, moderating to 125,167 jobs. Over the same period, average annual growth registered 3.0%. Total visitor employment accounted for about 5% of all jobs in Connecticut in 2025.

Total Business Sales
$ billions



Source: Tourism Economics

Total Visitor-Supported Employment in Connecticut
jobs



Source: Tourism Economics

Personal Income Impacts

Visitor activity generated $4.0 billion in direct personal income in 2025. Including indirect and induced impacts, employees received $7.1 billion in personal income. Total visitor-generated income in Connecticut increased 2.8% in 2025.

$4.0B Direct Personal Income **+** **$1.2B** Indirect Personal Income **+** **$1.8B** Induced Personal Income **=** **$7.1B** Total Personal Income

Personal Income by Industry (2025)

$ millions

	Direct Personal Income	Indirect Personal Income	Induced Personal Income	Total Personal Income
Total, all industries	**$4,035**	**$1,241**	**$1,835**	**$7,111**
Food & Beverage	$1,248	$37	$147	$1,433
Government	$805	$47	$19	$872
Business Services	$9	$573	$230	$812
Recreation and Entertainment	$615	$34	$24	$673
Education and Health Care		$4	$617	$621
Lodging	$608	$1	$1	$609
Finance, Insurance and Real Estate	$44	$201	$309	$554
Retail Trade	$277	$7	$154	$438
Personal Services	$163	$63	$125	$351
Other Transport	$165	$59	$28	$252
Wholesale Trade		$44	$89	$134
Communications		$74	$40	$114
Construction and Utilities		$58	$20	$78
Air Transport	$62	$1	$2	$65
Manufacturing		$31	$19	$50
Gasoline Stations	$38	$1	$9	$48
Agriculture, Fishing, Mining		$5	$3	$8

Source: Tourism Economics

Tax Impacts

Visitor activity generated $3.3 billion in government revenues in 2025. State and local taxes alone neared $1.6 billion in 2025.

Each household in Connecticut would need to be taxed an additional $1,097 to replace the visitor-generated taxes received by state and local governments in 2025.

Tax Impacts (2025)
$ millions

	Direct	Indirect/ Induced	Total
TOTAL	**$2,125.2**	**$1,143.0**	**$3,268.2**
Federal	**$1,019.0**	**$675.8**	**$1,694.8**
Personal Income	$504.0	$316.6	$820.6
Corporate	$56.1	$54.8	$110.9
Indirect business	$62.5	$34.5	$97.0
Social insurance	$396.5	$269.8	$666.3
State and Local	**$1,106.1**	**$467.2**	**$1,573.4**
Sales	$440.2	$151.8	$592.0
Bed Tax	$180.5		$180.5
Personal Income	$134.3	$85.1	$219.4
Corporate	$14.5	$15.0	$29.5
Social insurance	$3.4	$2.5	$5.9
Excise and Fees	$38.1	$25.3	$63.4
Property	$295.1	$187.7	$482.8

Source: Tourism Economics

TOURISM ECONOMICS

APPENDIX

Appendix

Methodology Overview

Measuring the visitor economy begins with a comprehensive demand side analysis. A visitor is defined as someone who stayed overnight or traveled more than 50 miles to the destination.

The study area is defined as the state of Connecticut.

Visitor survey data provide estimates on the volume of visitors by type and their spending in specific categories (e.g. lodging, restaurants, retail, recreation and entertainment, transportation). These estimates are strengthened through an analysis of industry-specific data sets on the lodging industry, aviation, and sectoral-level business sales. Government data, including taxes by type as well as employment and personal income by industry are used to supplement and confirm demand-side visitor spending calculations.

The primary source of the employment and wage data is the Regional Economic Information System (REIS), maintained by the Bureau of Economic Analysis (BEA). This is more comprehensive than Bureau of Labor Statistics (BLS QCEW) data because sole-proprietors do not require unemployment insurance and are not counted in the QCEW data.

The complete set of data inputs is provided below.

Data Sources

- **Longwoods International:** Consumer survey data, including spending and visitor profile characteristics
- **STR and AllTheRooms:** Lodging performance data, including room demand and revenue, for hotels and short-term rentals
- **Connecticut Department of Revenue:** Lodging and sales tax receipts, by industry
- **BEA/BLS:** Employment and wage data, by industry
- **US Census:** Business sales and employment by industry, and seasonal second homes inventory
- **Tourism Economics:** International arrivals data for visitors to Connecticut

Glossary

SPENDING DEFINITIONS	LODGING	*All accommodation businesses, including hotels, B&Bs, campgrounds, and short-term rentals. This includes food, entertainment, and other services provided by these establishments.*
	FOOD & BEVERAGE	*Includes all visitor spending on food & beverages, including at restaurants, bars, grocery stores and other food providers.*
	RECREATION	*Includes visitors spending within the arts, entertainment and recreation sector.*
	RETAIL	*Includes visitor spending in all retail sub-sectors within the local economy, excluding grocery stores.*
	LOCAL TRANSPORT	*Ride share, taxis, limos, trains, rental cars, buses, and gasoline purchases.*
	AIR TRANSPORT	*Where applicable, the local share of air transportation spending.*
	SECOND HOMES	*Where applicable, spending associated with seasonal second homes for recreational use as defined by the Census Bureau.*
ECONOMIC IMPACT DEFINITIONS	DIRECT IMPACT	*Impacts (business sales, jobs, income, and taxes) related to businesses where visitors spend dollars (e.g. recreation, transportation, lodging).*
	INDIRECT IMPACT	*Impacts created from the purchase of goods and services as inputs (e.g. food wholesalers, utilities, business services) into production by the directly affected sectors (i.e. business-to-business purchases).*
	INDUCED IMPACT	*Impacts created from spending in the local economy by employees whose wages are generated either directly or indirectly by visitor activity.*
	EMPLOYMENT	*Employment is measured by the Bureau of Economic Analysis (BEA) definition, and captures full-time and part-time jobs, which includes salary and wage employees and proprietors.*
	PERSONAL INCOME	*Income (wages, salaries, proprietor income and benefits) supported by visitor spending.*
	VALUE ADDED (GDP)	*Business sales net of intermediate (supply chain) purchases.*
	LOCAL TAXES	*City and County taxes generated by visitor spending. Includes any local sales, income, bed, usage fees, licenses and other revenue streams to local governmental authorities.*
	STATE TAXES	*State tax revenues generated by visitor spending. Includes sales, income, corporate, usage fees and other assessments of state governments.*

About the Research Team

This study was conducted by the Tourism Economics group within Oxford Economics. Tourism Economics combines an understanding of traveler dynamics with rigorous economics to answer the most important questions facing destinations, investors, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, forecasting models, policy analysis, and economic impact studies.

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modeling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

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