

H2R Market Research

Reveal Your Customer's Full Experience

Connecticut Traveler Profile

***Visualizations Derived from OmniTrak's TravelTrakAmerica
Data***

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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 they relate to travelers’ behavior from competitive New England states (comp set) including NY, NJ, MA, RI, CT, ME, VT, NH, and PA.

Presentation Overview

01

Travel Profile

Pages 8-16

+ Overview of key travel statistics

02

In-Market Travel Behavior

Page 17-23

+ Activities that travelers participated in

03

Travel Planning

Pages 24-30

+ Consideration and decision time, booking methods and more

04

Psychographic Insights

Pages 31-39

+ Insights into other types of travel behavior Connecticut travelers engage in

05

Traveler Demographics

Pages 40-51

+ Demographic profile of Connecticut visitors

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

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

Characteristics that Connecticut Travelers are less likely to exhibit than visitors to regional competitors

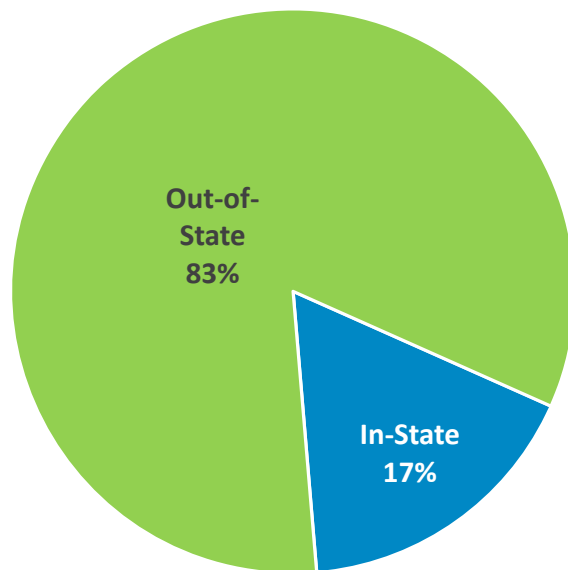
	Connecticut	Variance to Comp Set	Insight
Earn HH Income of Less than \$50k	19%	-8.1%	<i>Have the ability to enjoy upscale experiences</i>
Length of Stay (Nights)	3.8 nts	-7.3%	<i>Likely because CT hosts fewer air travelers from distance</i>
Stayed Overnight in Private Home	25%	-6.7%	<i>More travelers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

Travel Profile

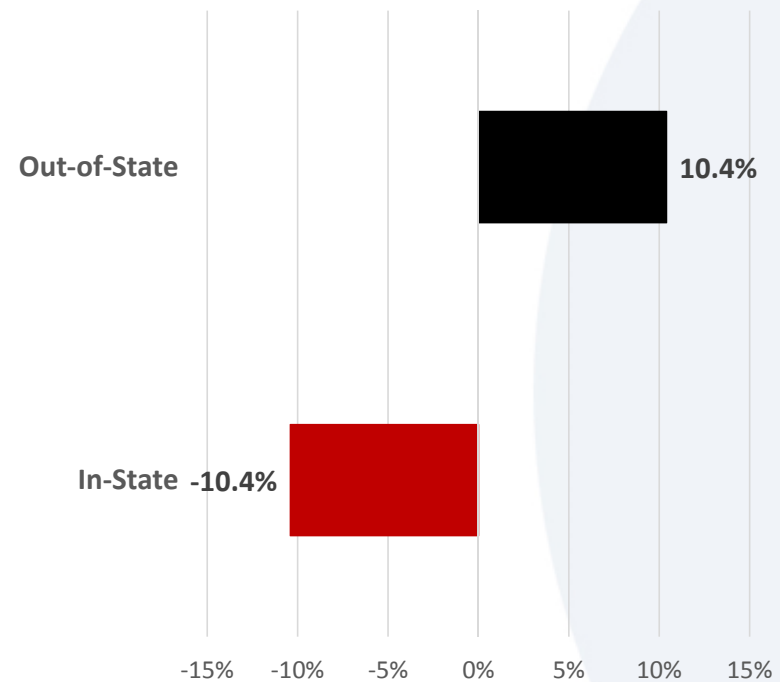
01

The vast majority (83%) of Connecticut tourism is generated from out-of-state travelers, even 10 points higher than the comp set

In-State vs Out-of-State Visitors*



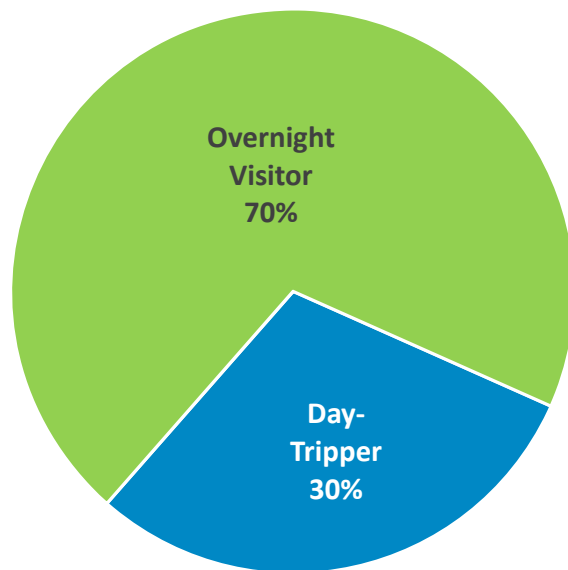
Versus Comp Set



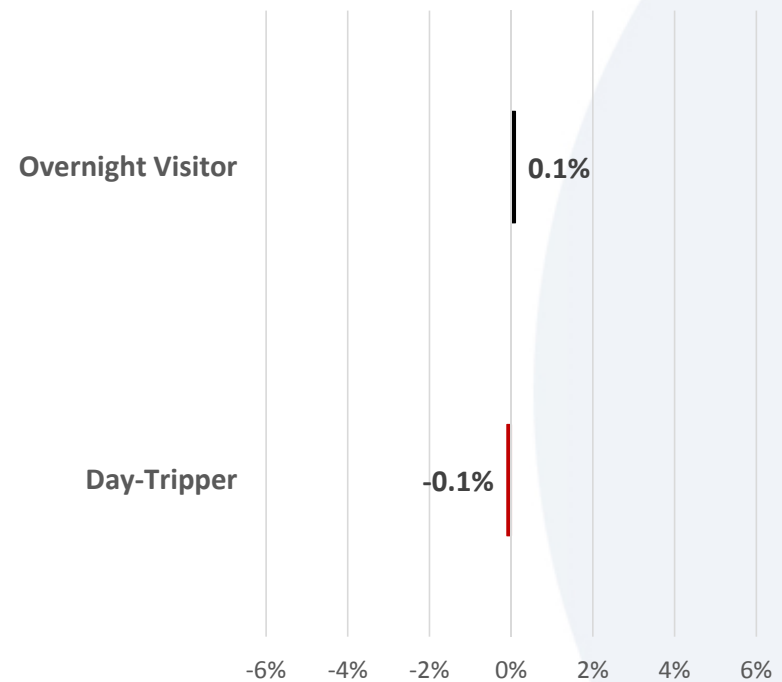
*Using travel industry standard definitions

Most (70%) Connecticut travelers spend the night in the area, comparable to the overarching comp set

Day-Trips vs Overnight

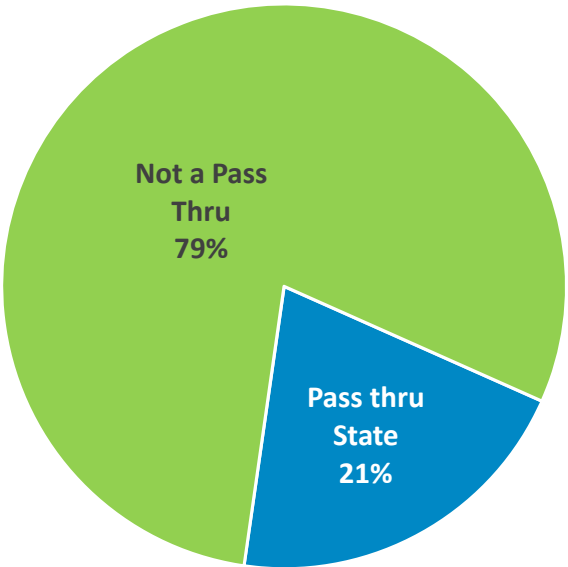


Versus Comp Set

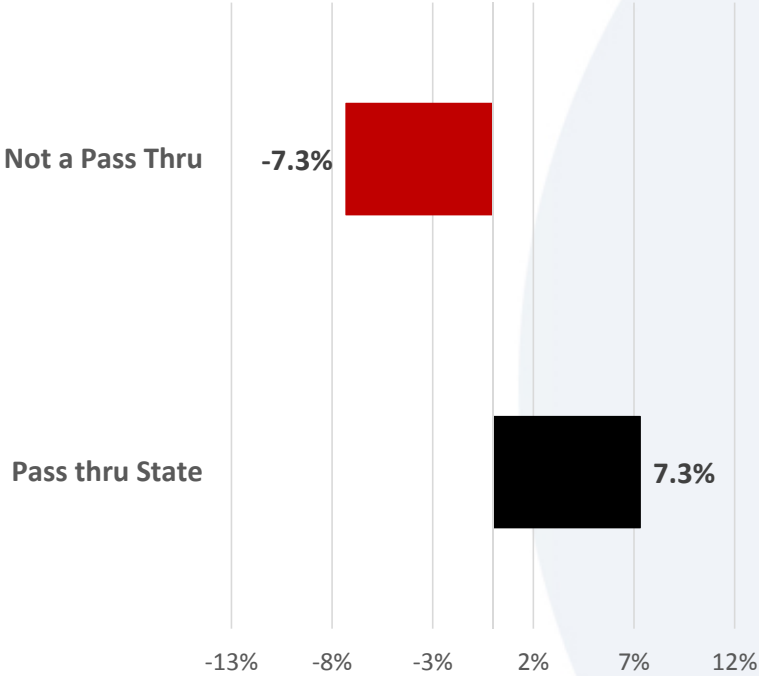


About one in four Connecticut visitors were passing through on their way to another destination. Connecticut is more likely to be a pass through state than other states in the competitive set.

Pass Thru Visitors

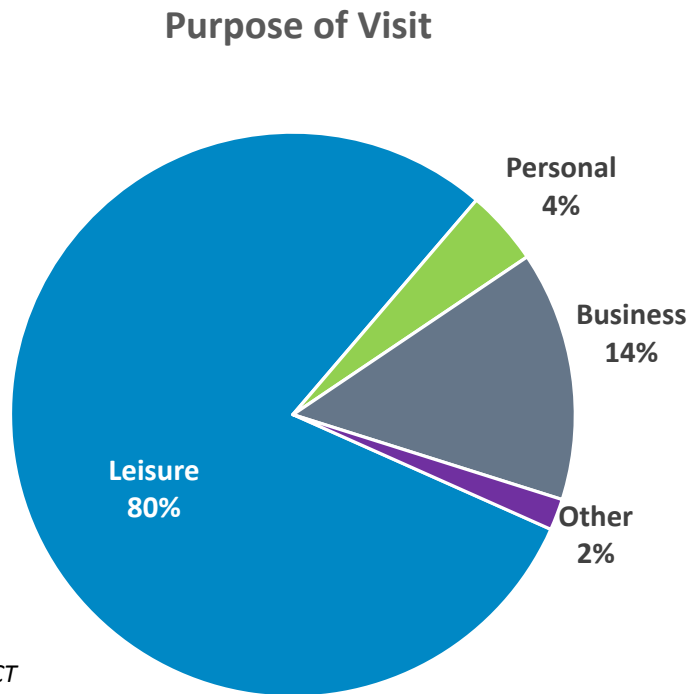


Versus Comp Set

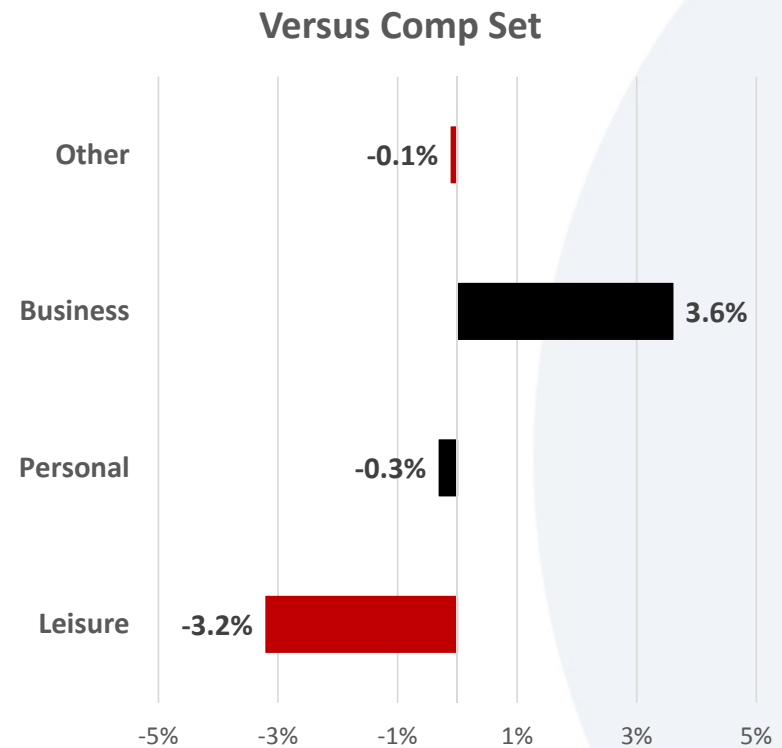


SOURCE: OmniTrak, "TravelTrakAmerica," 2017

Most (80%) Connecticut travelers visit for leisure purposes. But, it is business travel that sets the state apart from New England as a whole.

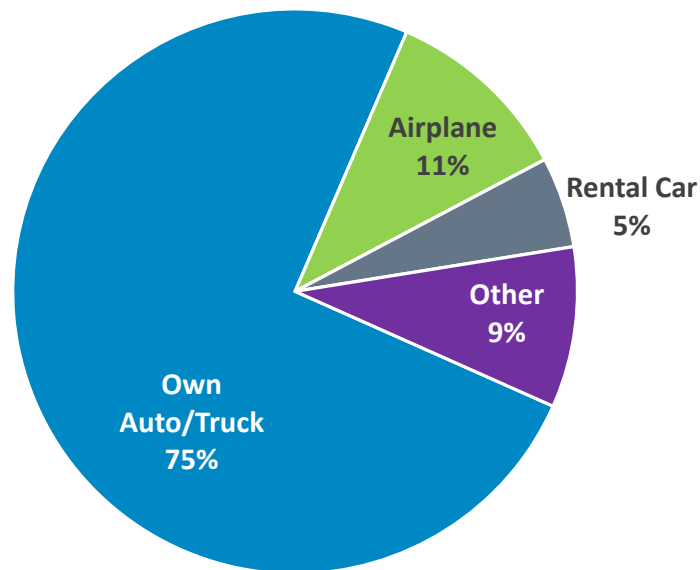


Note that 23% of CT business travelers extend their stay to enjoy some leisure while there

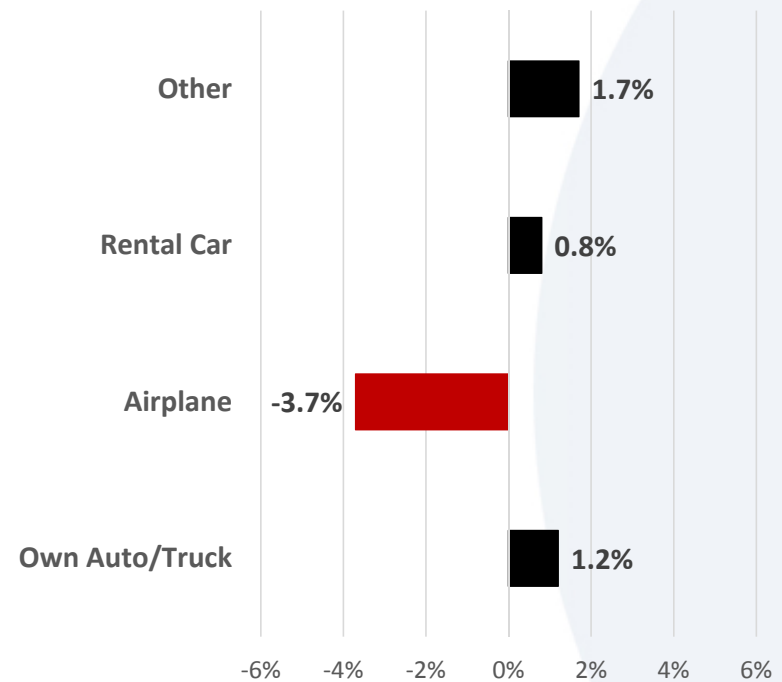


Three quarters (75%) of Connecticut visitors arrive by car/truck while 11% fly. And, Connecticut is less likely than its competitors (-3.7 points) to attract visitors arriving by commercial air.

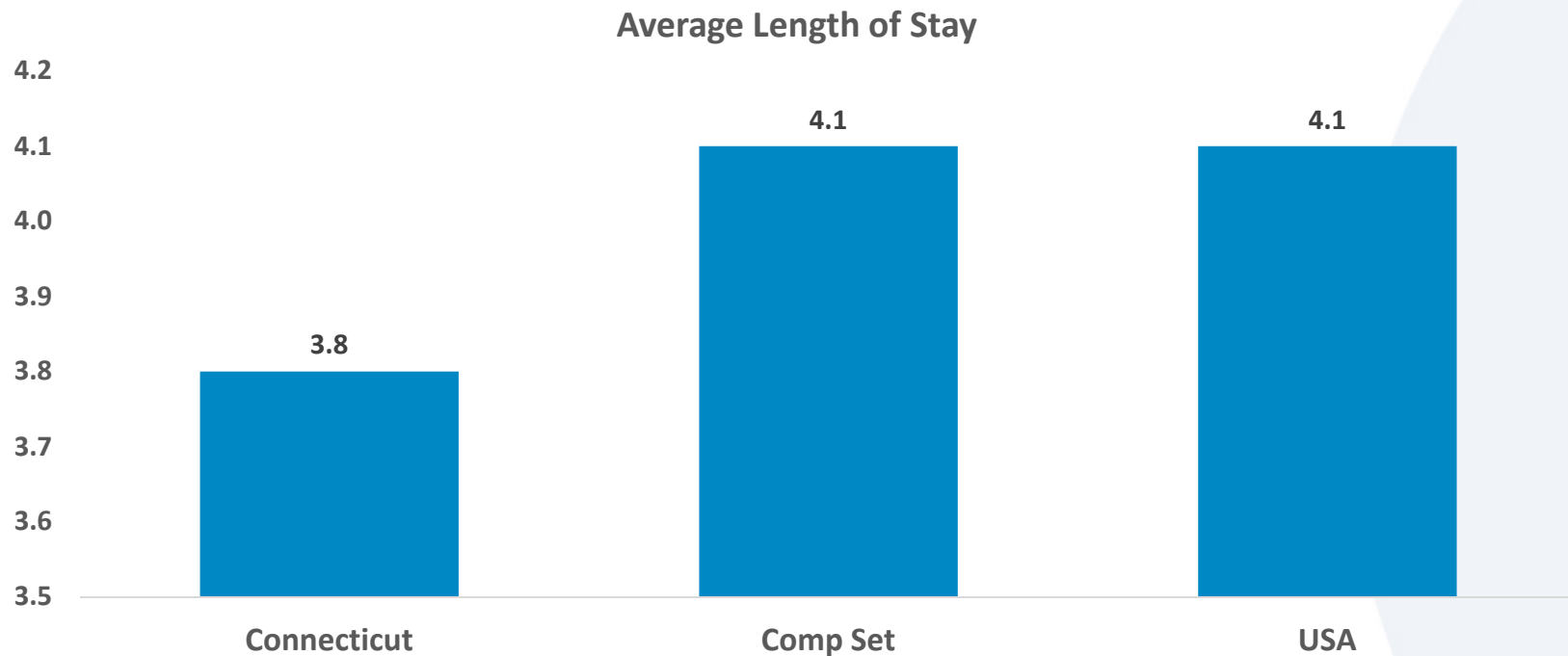
Primary Method of Transportation



Versus Comp Set

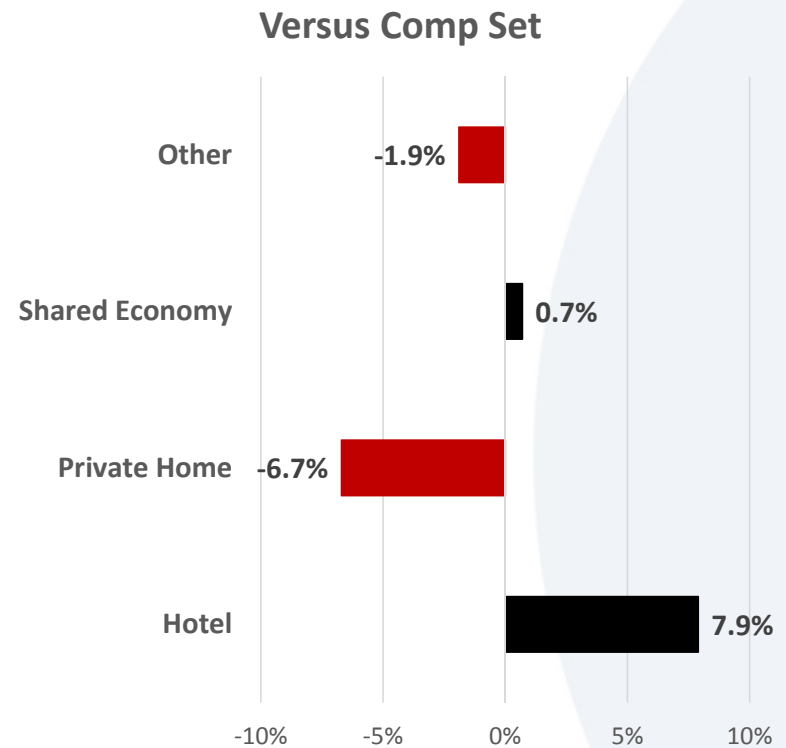
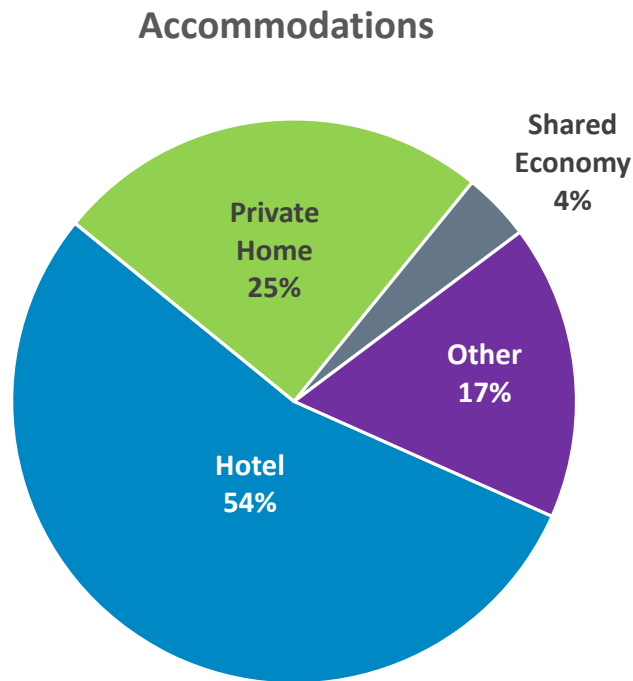


Connecticut's average Length of Stay has increased since 2014, but it remains 0.3 days shorter than both the comp set and the USA as a whole

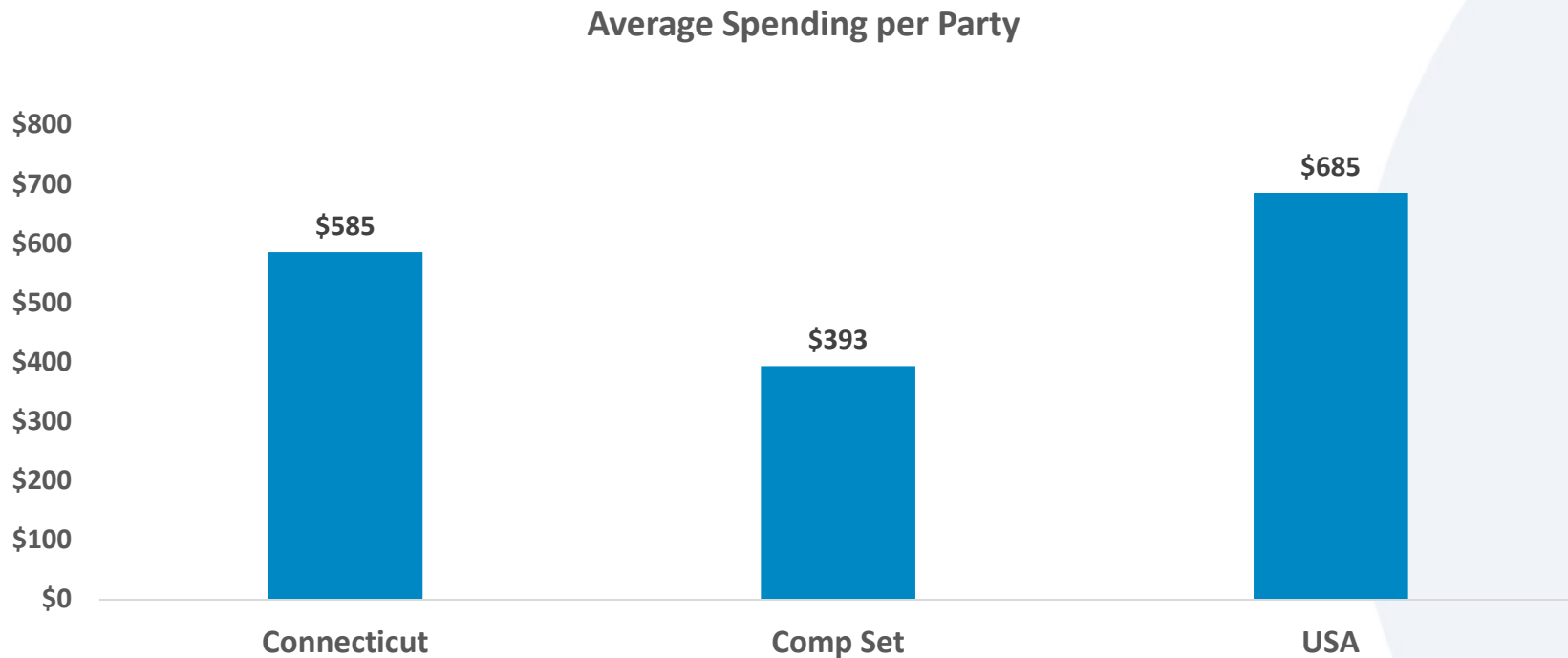


SOURCE: OmniTrak, "TravelTrakAmerica," 2017

More than half (54%) of Connecticut Travelers stay overnight in hotels, 25% in private homes and 4% in shared economy lodging.



The average Connecticut travel party spends \$585 on their visit, \$192 more than travelers across the comp set. But, \$100 less than travelers nationwide.

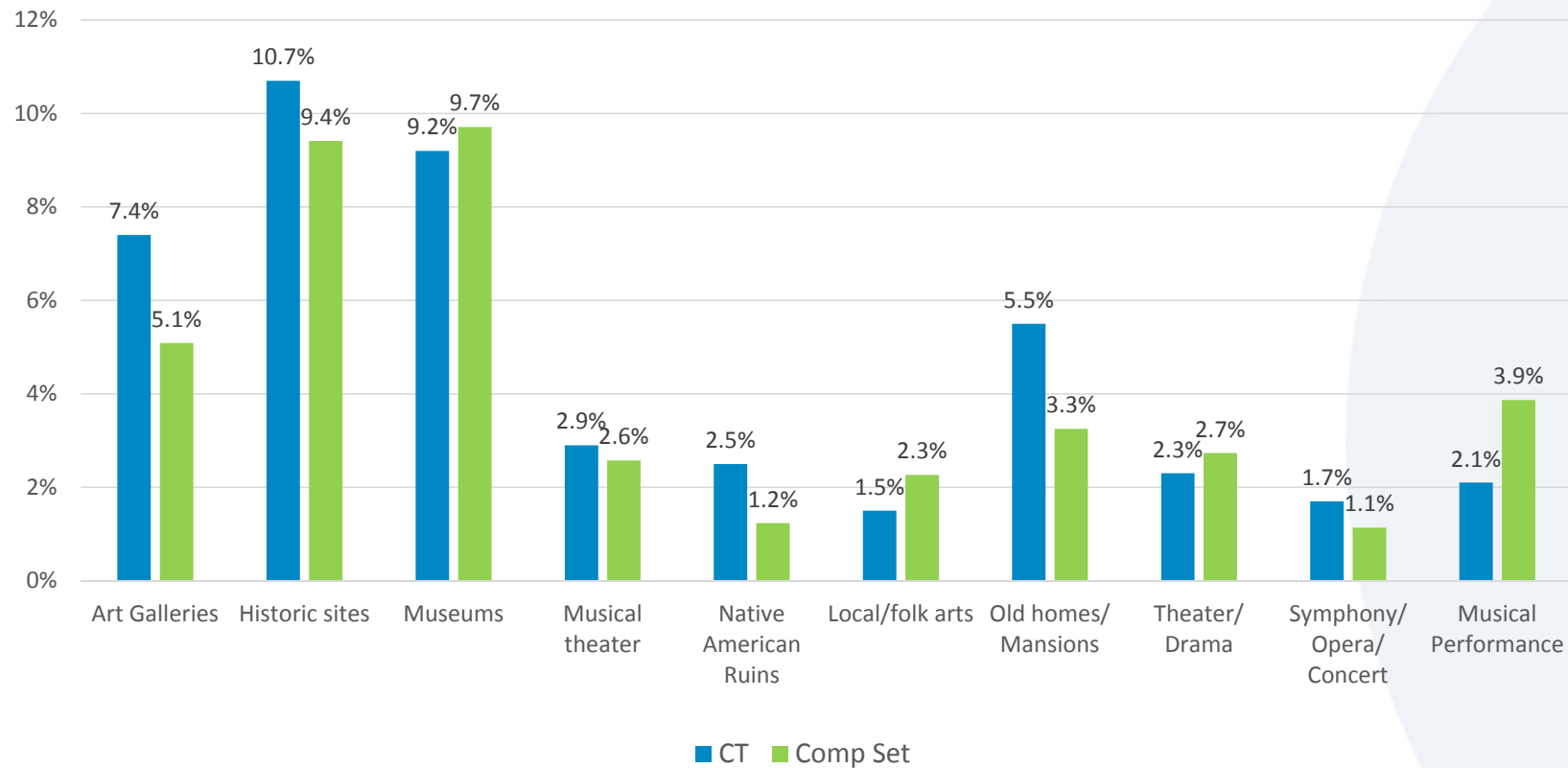


SOURCE: OmniTrak, "TravelTrakAmerica," 2017

In-Market Travel Behavior

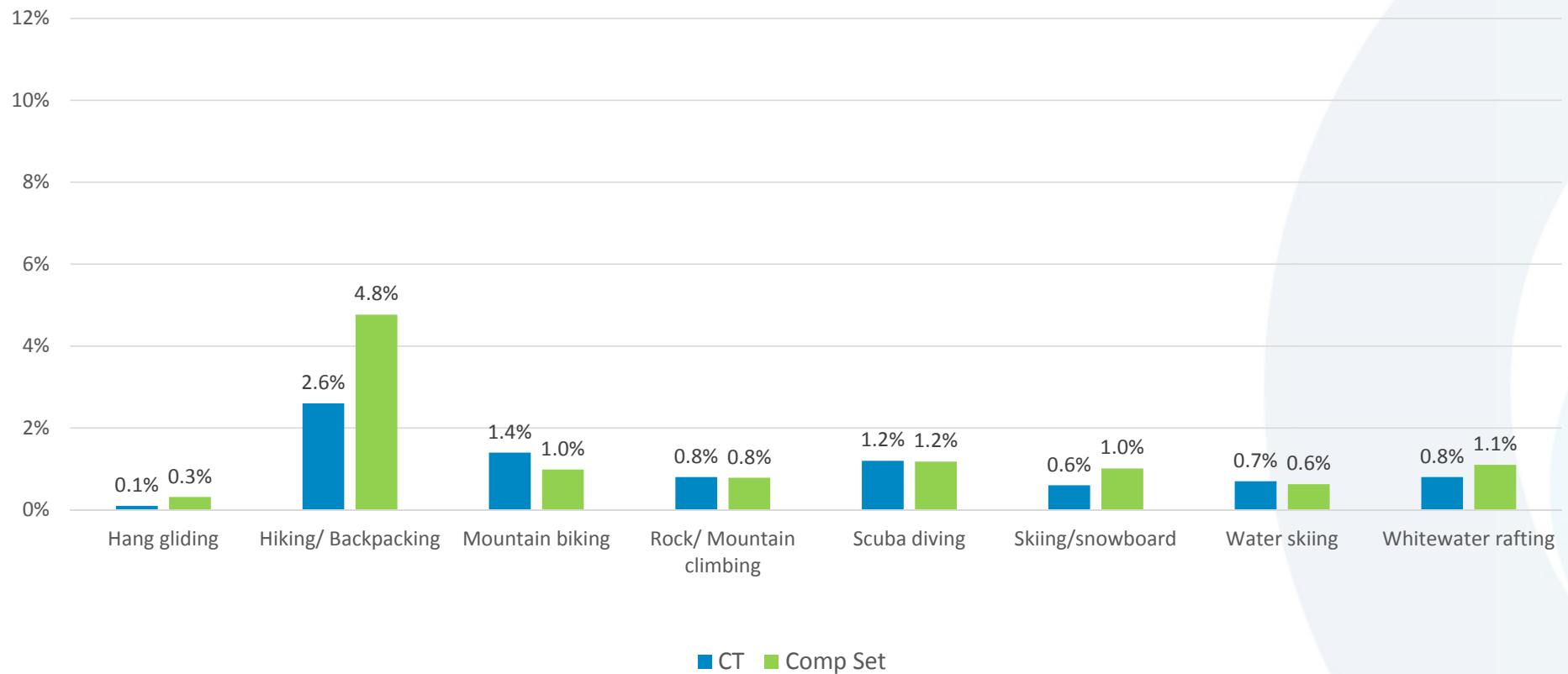
02

Arts & Culture. Connecticut travelers are more likely to visit art galleries, historic sites and old homes than visitors to other regional states.



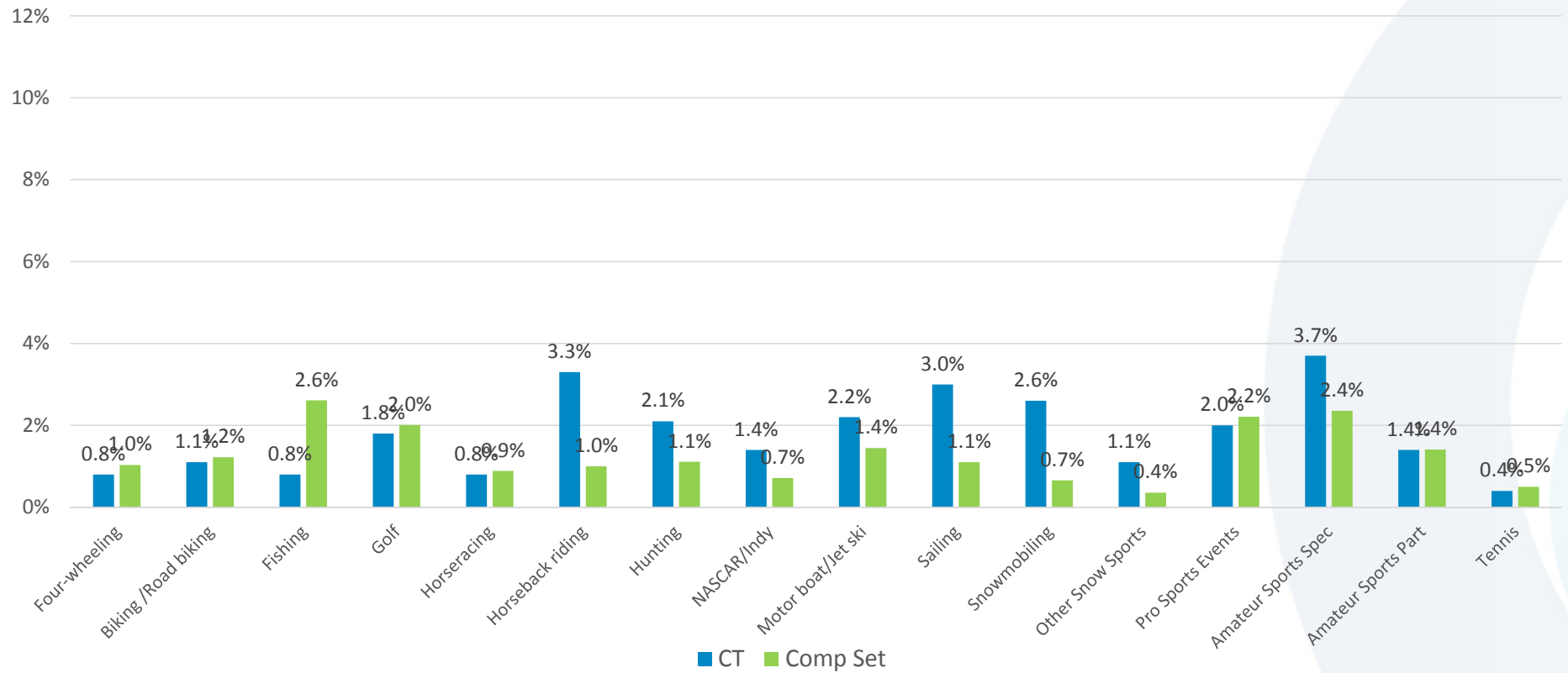
SOURCE: OmniTrak, "TravelTrakAmerica," 2017

Adventure Sports. Connecticut travelers are less likely to participate in most adventure sports than other states with the exception of Mountain Biking.



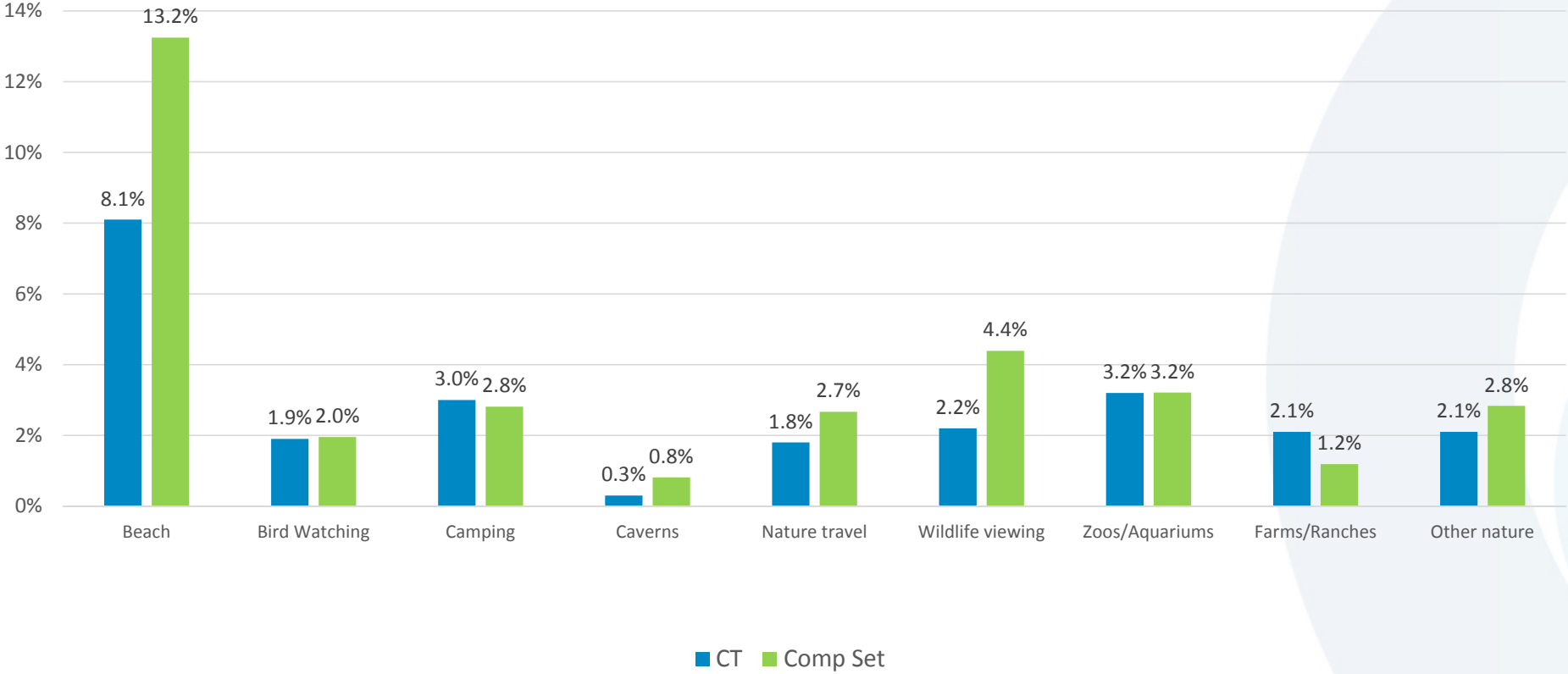
SOURCE: OmniTrak, "TravelTrakAmerica," 2017

Sports & Recreation. Connecticut travelers are more likely to participate in most sports & recreation activities, than other states.



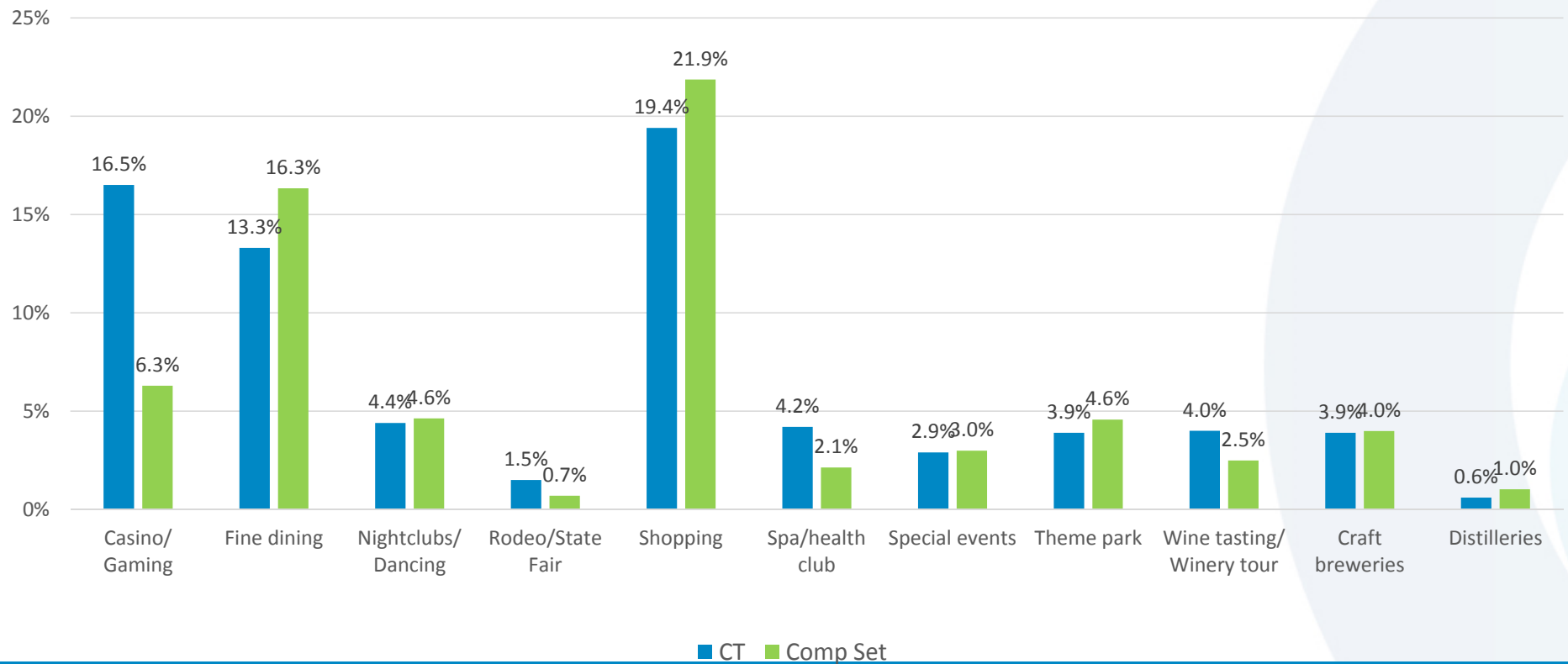
SOURCE: OmniTrak, "TravelTrakAmerica," 2017

Nature. In general, Connecticut travelers are less likely to participate in nature/outdoor activities, than the comp set overall



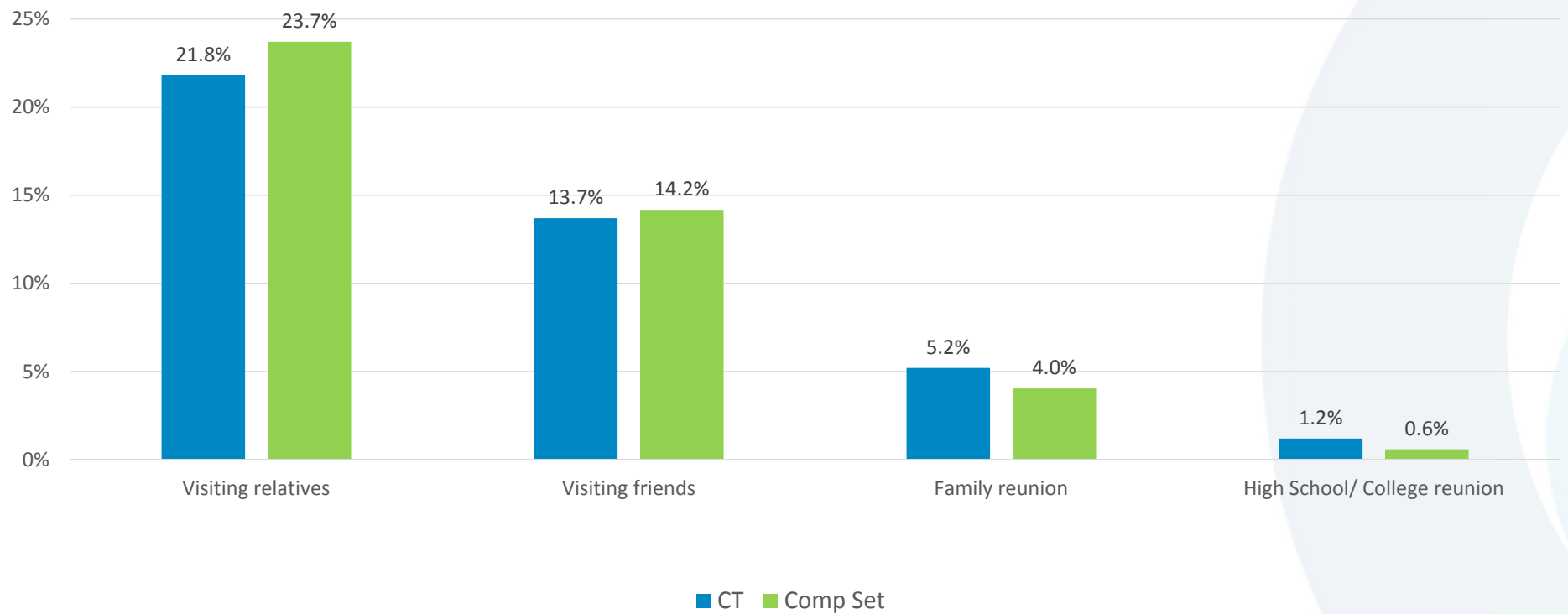
SOURCE: OmniTrak, "TravelTrakAmerica," 2017

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



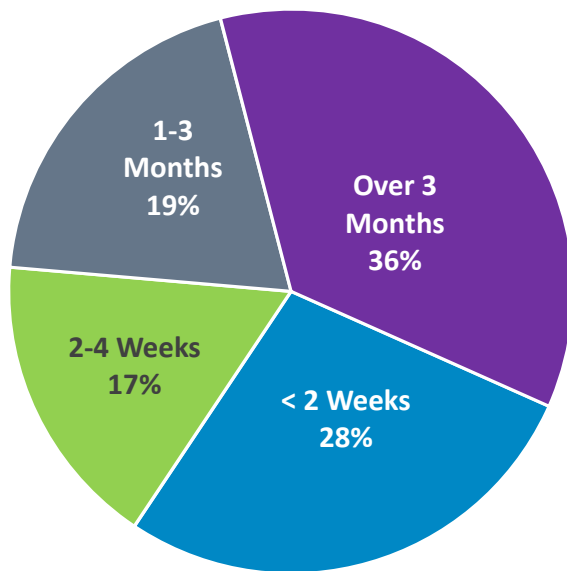
SOURCE: OmniTrak, "TravelTrakAmerica," 2017

Travel Planning

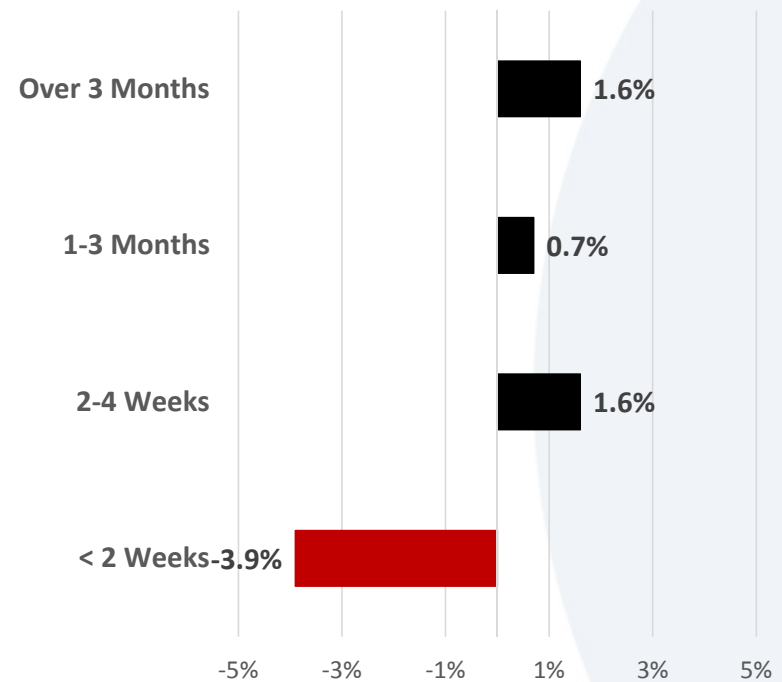
03

The average Connecticut traveler spent 109 days thinking about & considering their trip prior to visiting in 2017

Consideration Time*

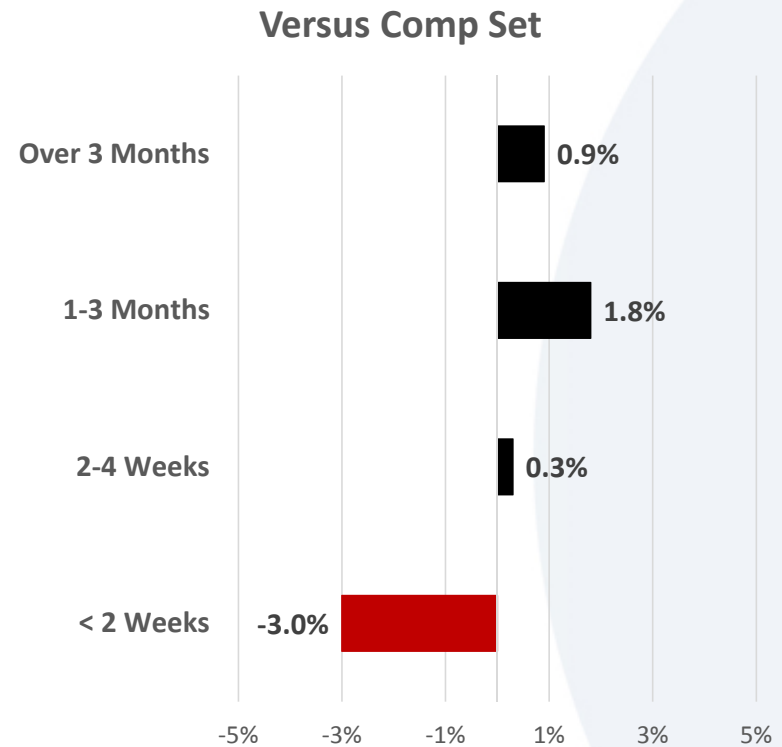
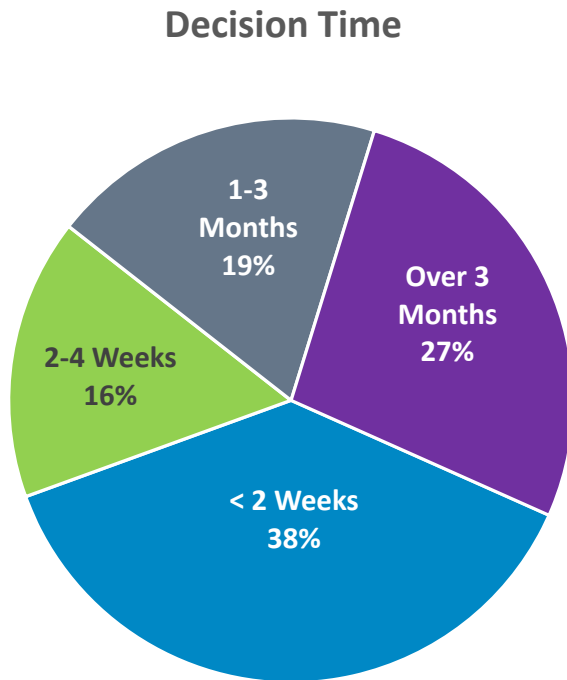


Versus Comp Set



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

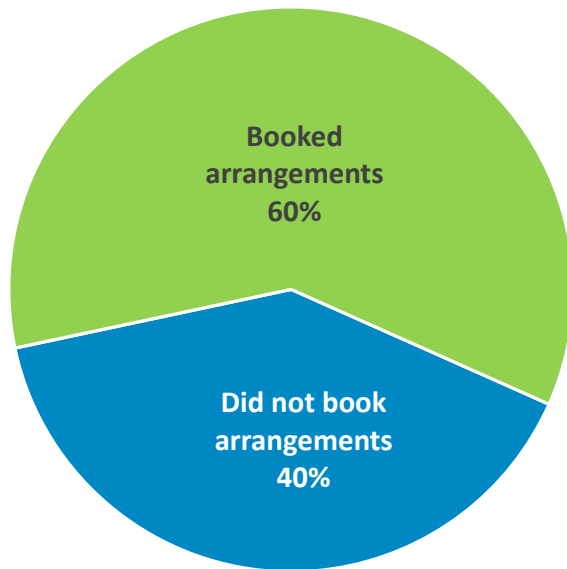
The average Connecticut traveler took 80 days to decide to visit Connecticut prior to actually making the trip in 2017.



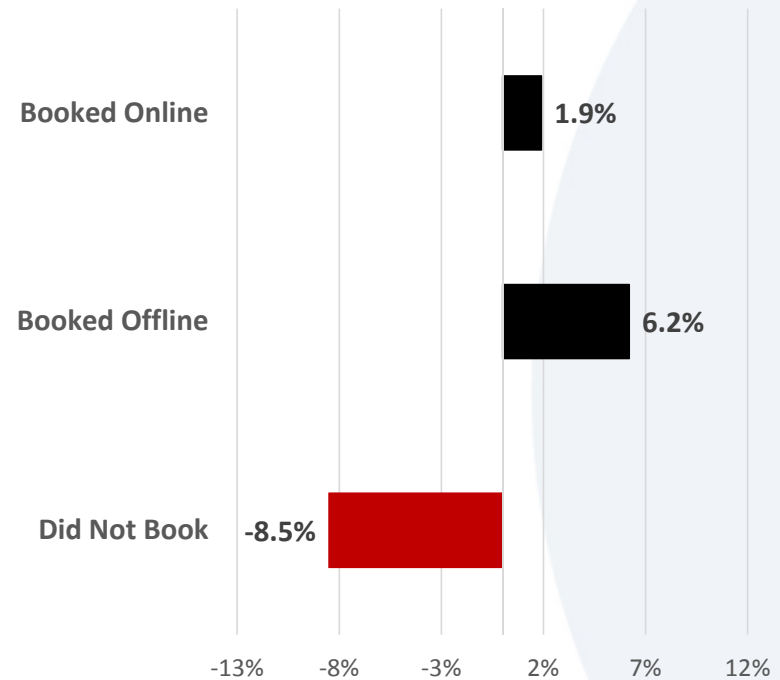
**Total elapsed time from the moment respondent made the decision to visit Connecticut to the time they took the actual trip.*

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.

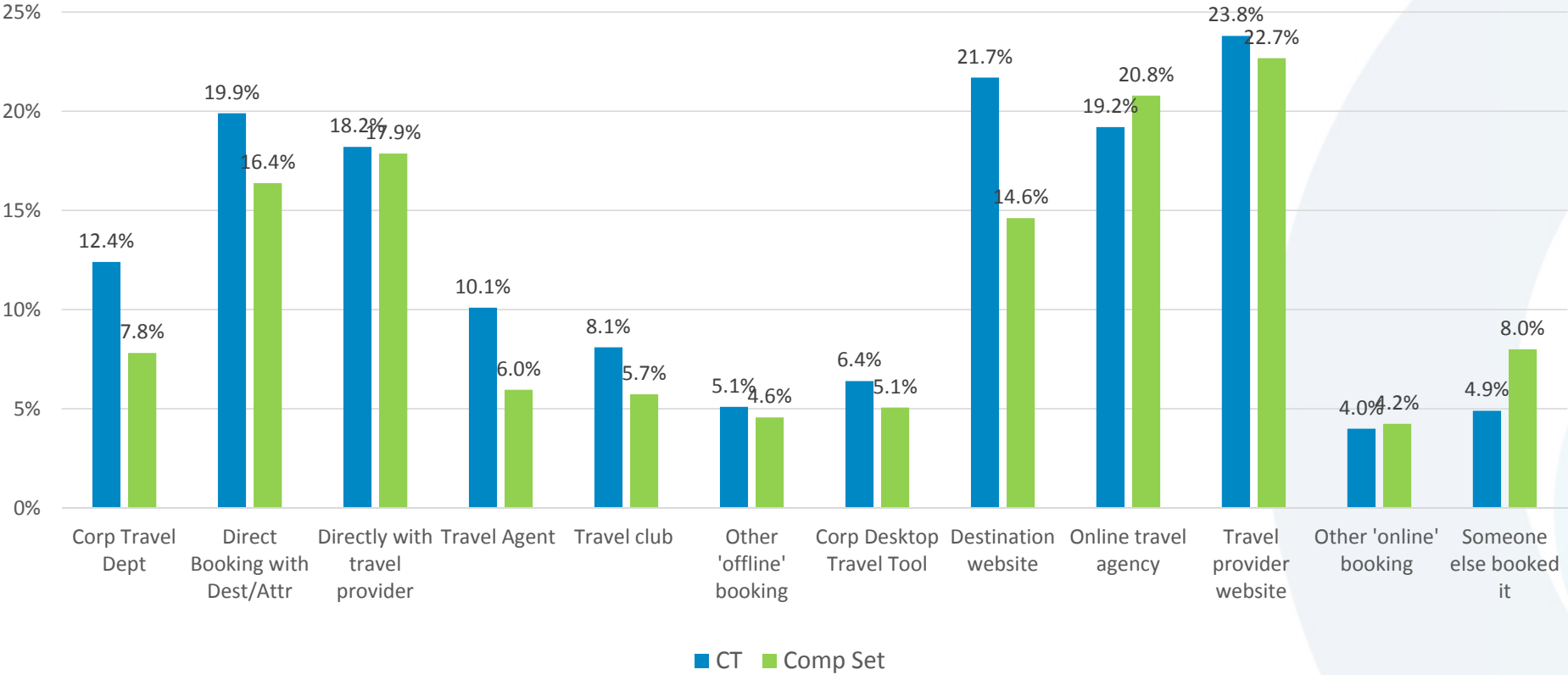
Booked Prior to Visiting



Versus Comp Set

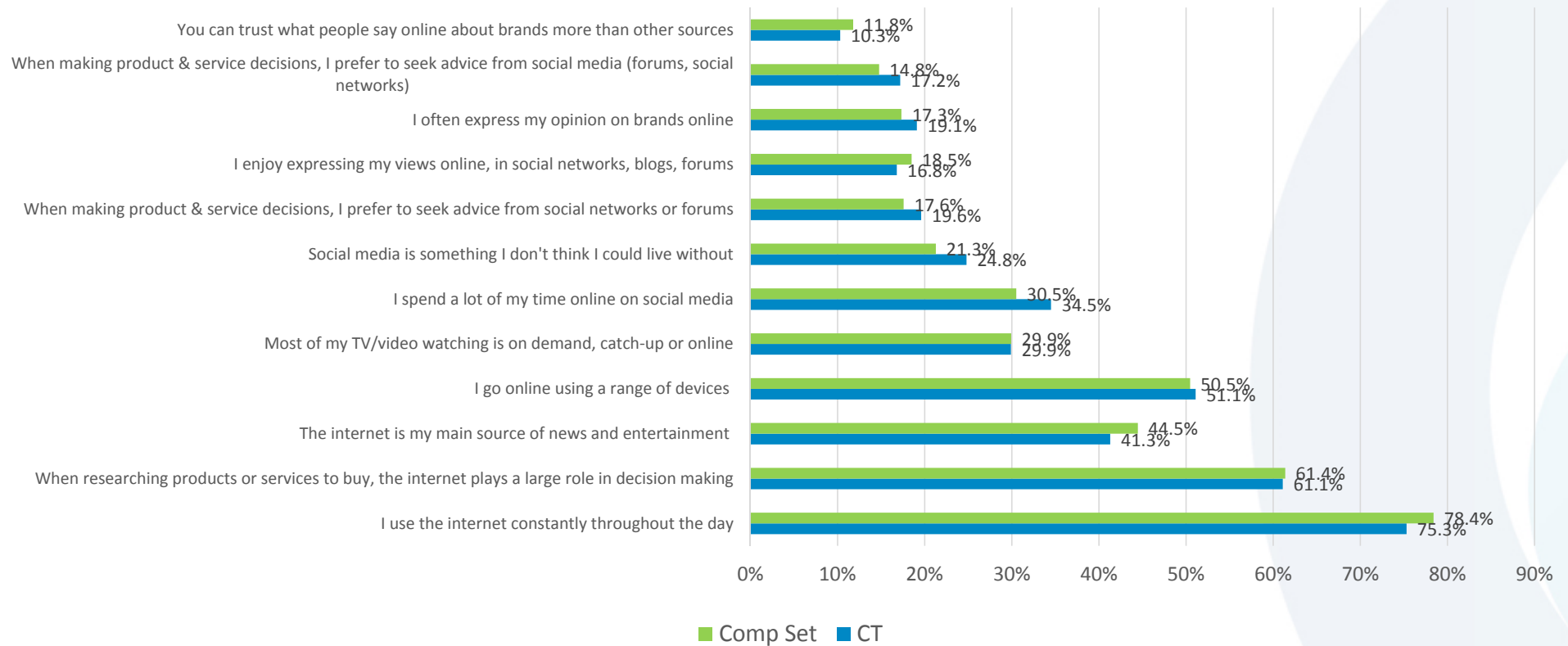


Connecticut travelers are more likely to visit the state's official website to book travel than other states' travelers.



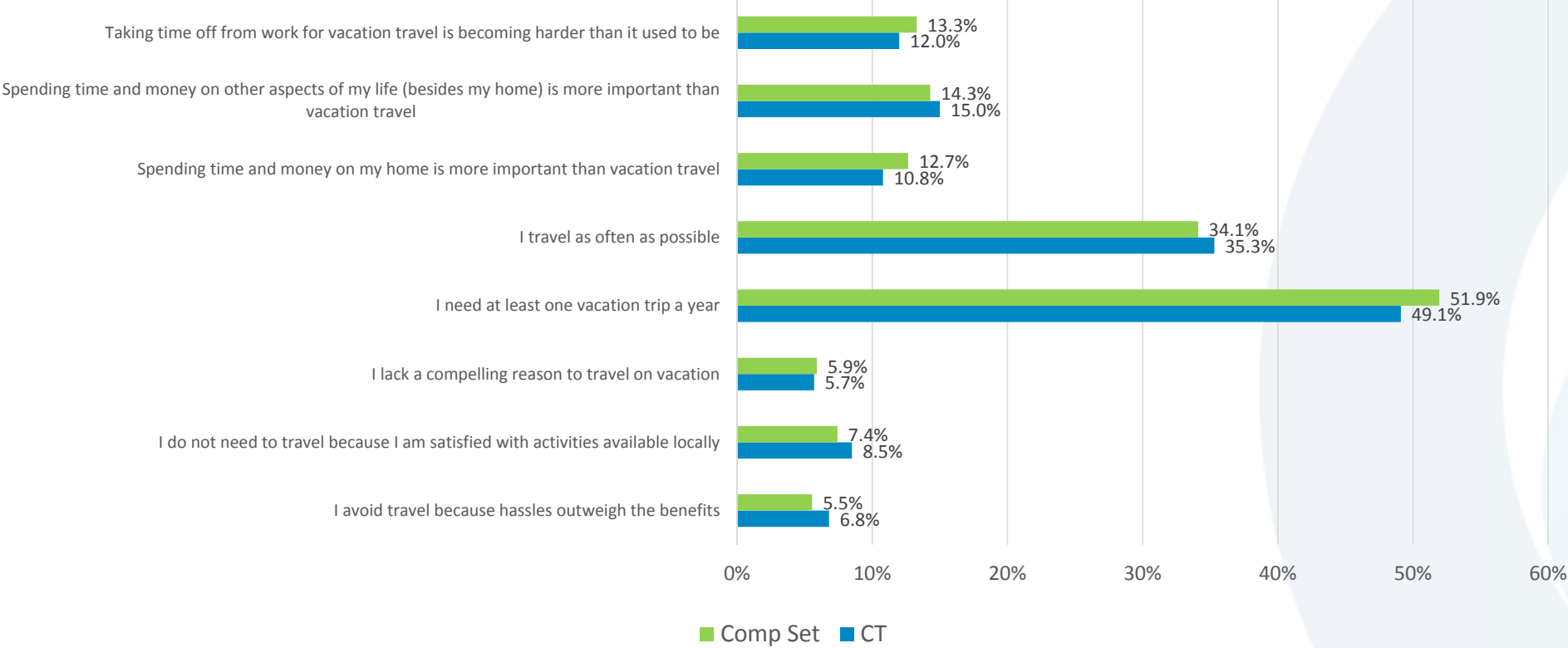
SOURCE: OmniTrak, "TravelTrakAmerica," 2017

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.



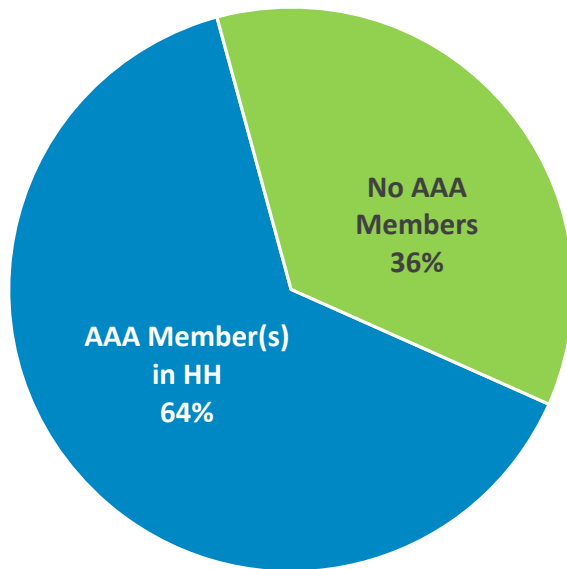
SOURCE: OmniTrak, “TravelTrakAmerica,” 2017

Psychographic Insights

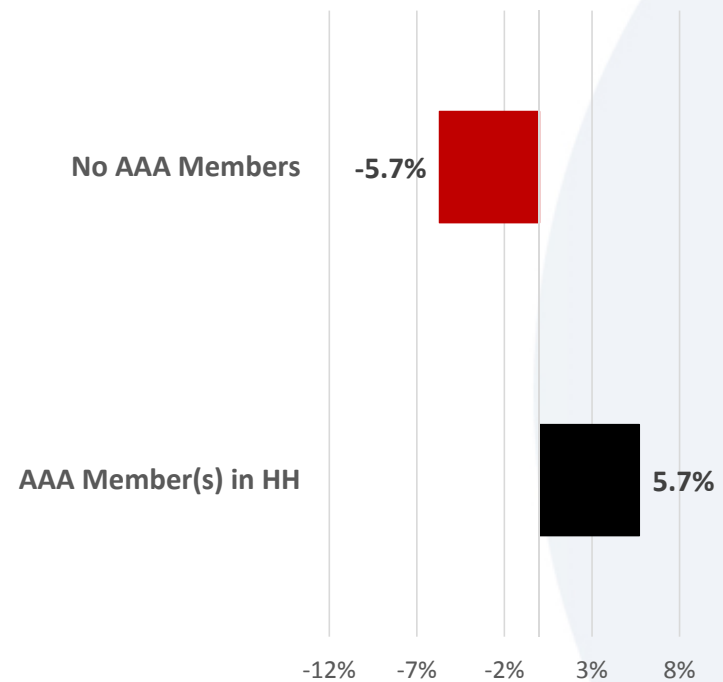
04

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

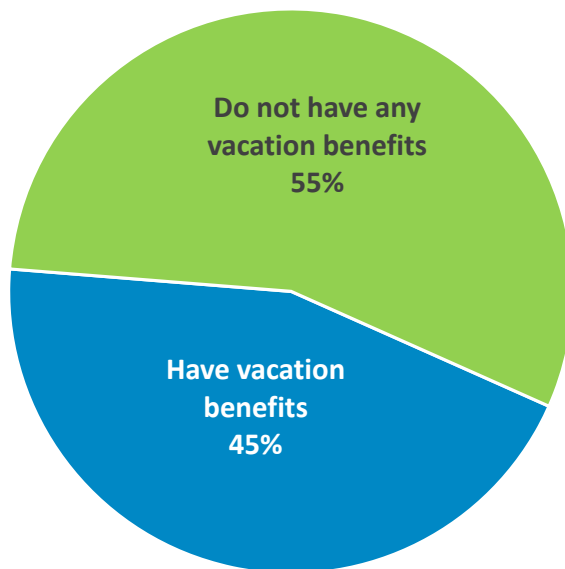


Versus Comp Set

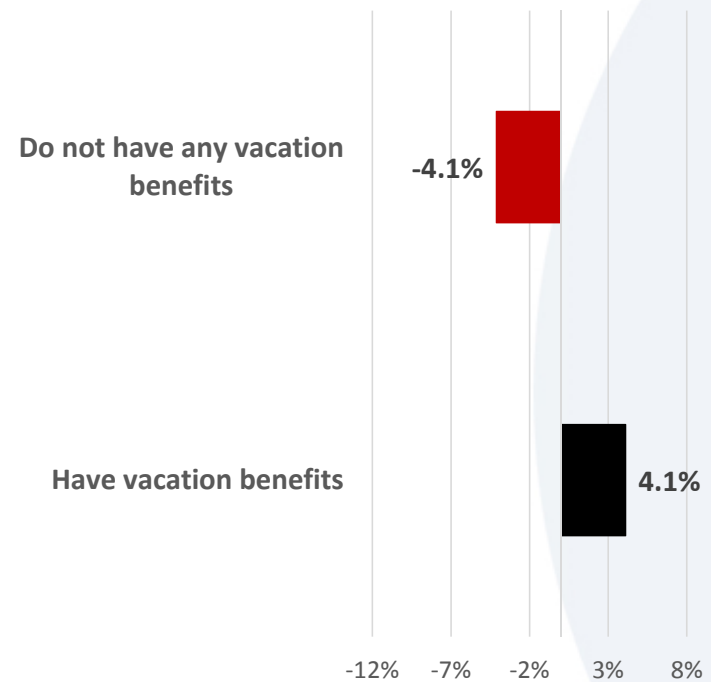


Most New England travelers to not receive vacation benefits, but Connecticut travelers (45%) are more likely to than average.

Vacation Benefits

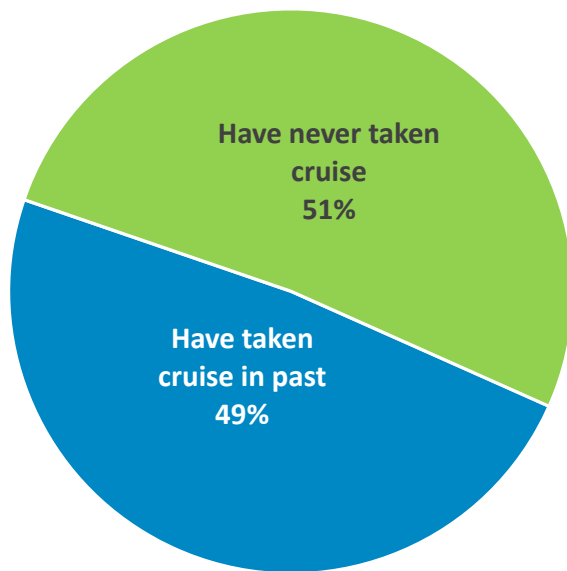


Versus Comp Set

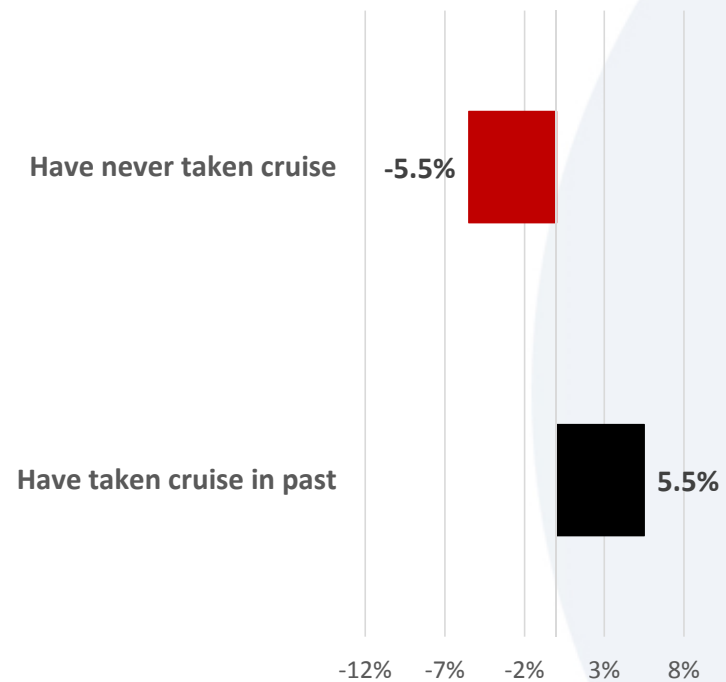


Nearly half (49%) of Connecticut travelers say they have taken at least one sea cruise in the past, nearly 6 points higher than among the comp set.

Ever Taken a Cruise

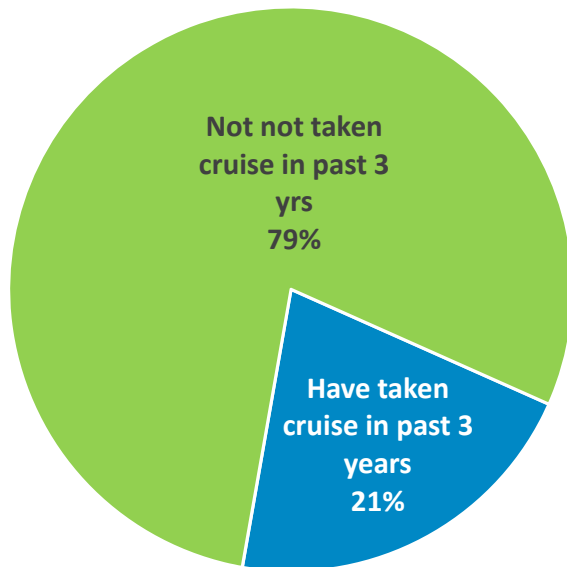


Versus Comp Set

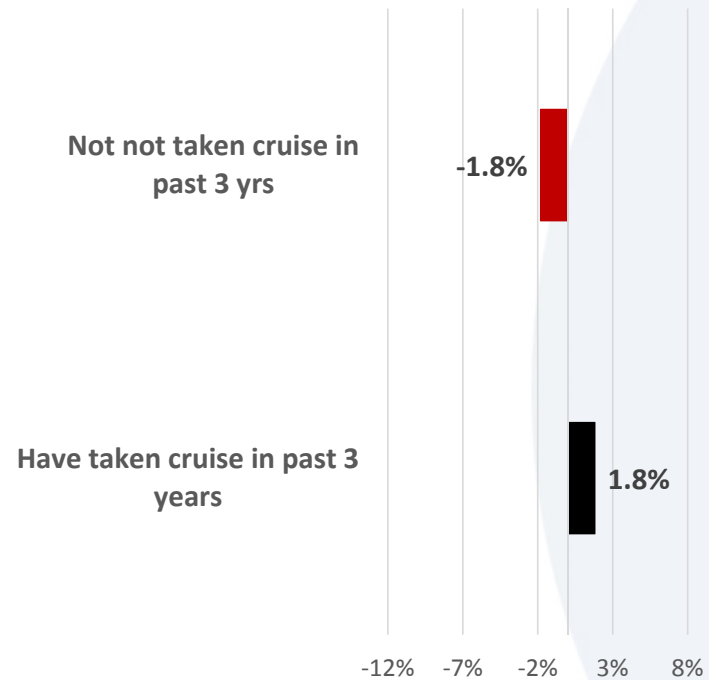


More than one in four (21%) of Connecticut travelers have taken a cruise in the past 3 years, nearly 2 points higher than among comp set travelers.

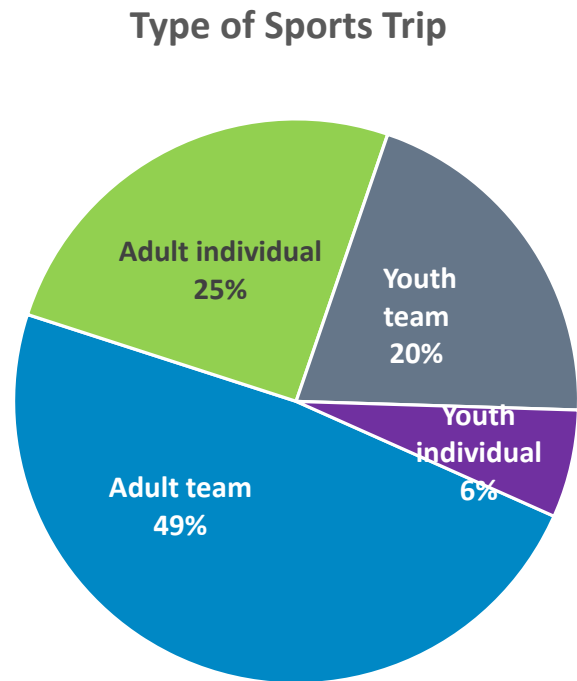
Taken a Cruise in Past 3 Years



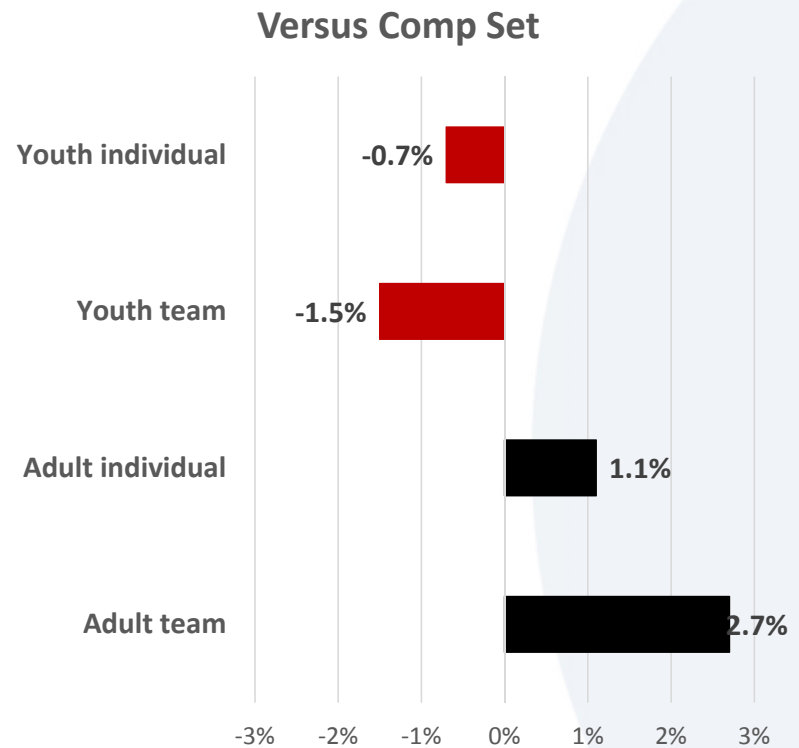
Versus Comp Set



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.

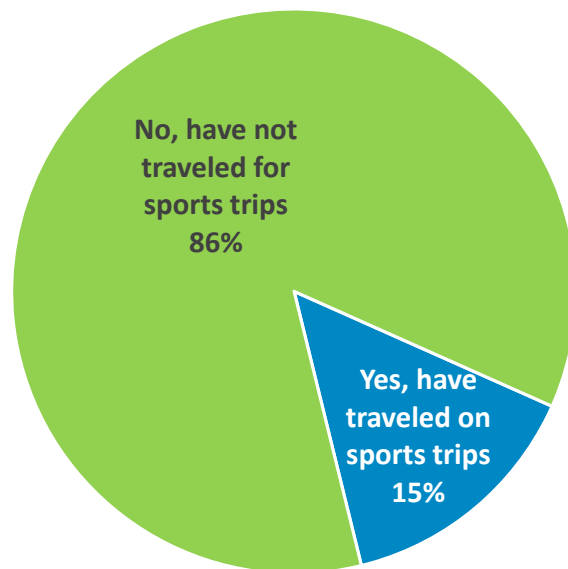


35% say they spend 3.0 extra nights in the area when they travel for sports

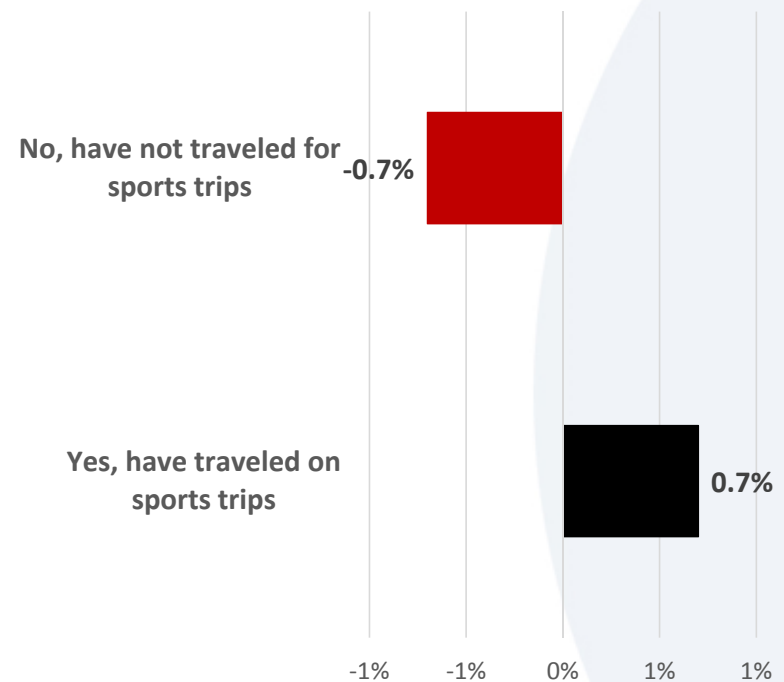


About 15% of Connecticut travelers indicated they had traveled on a sports-related trip in the past, nearly 1 point higher than the comp set.

Taken Any Sports Trips

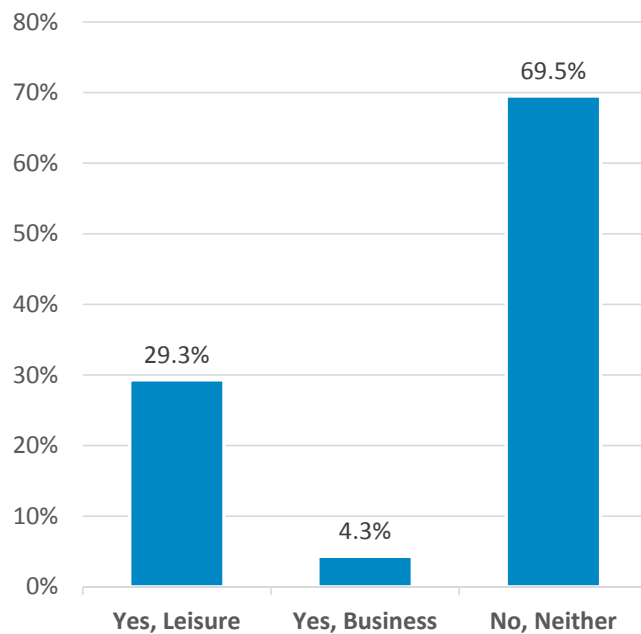


Versus Comp Set

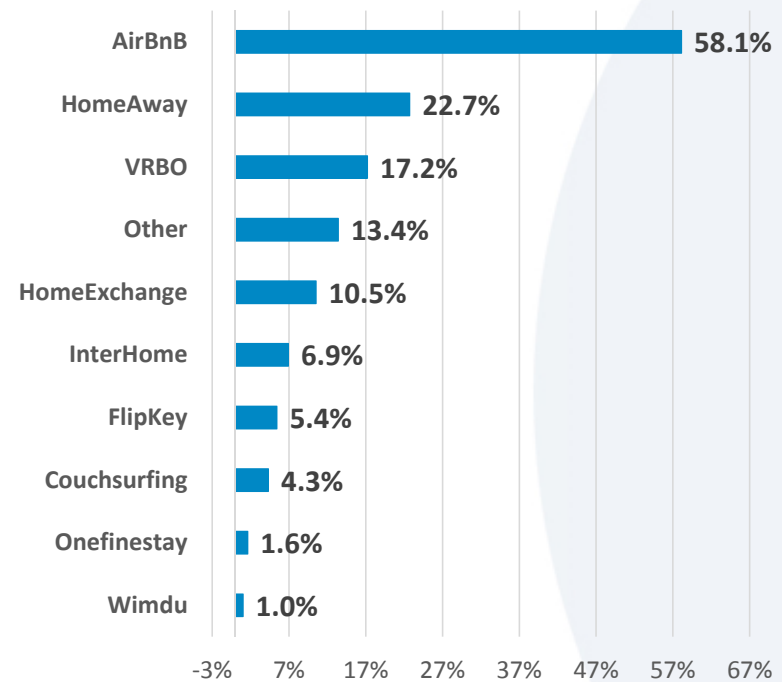


One in three Connecticut visitors report having used Sharing Economy Lodging in the past, mostly for leisure and mostly with AirBnB.

Sharing Economy - Lodging

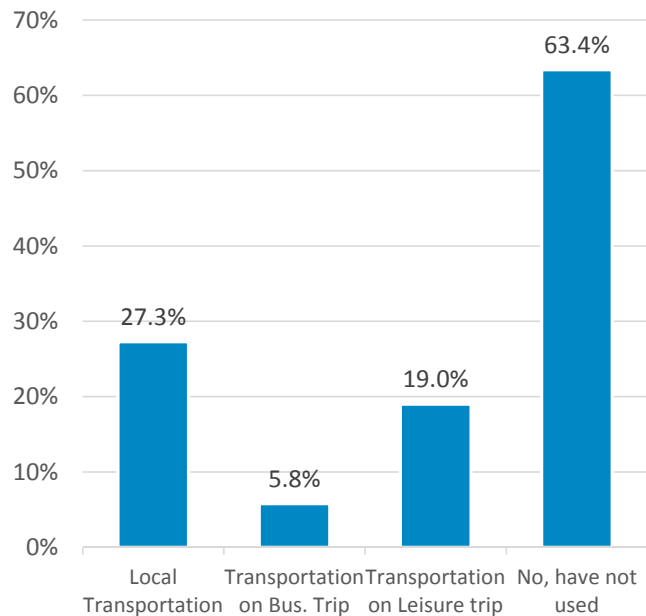


Sharing Economy Brands Used

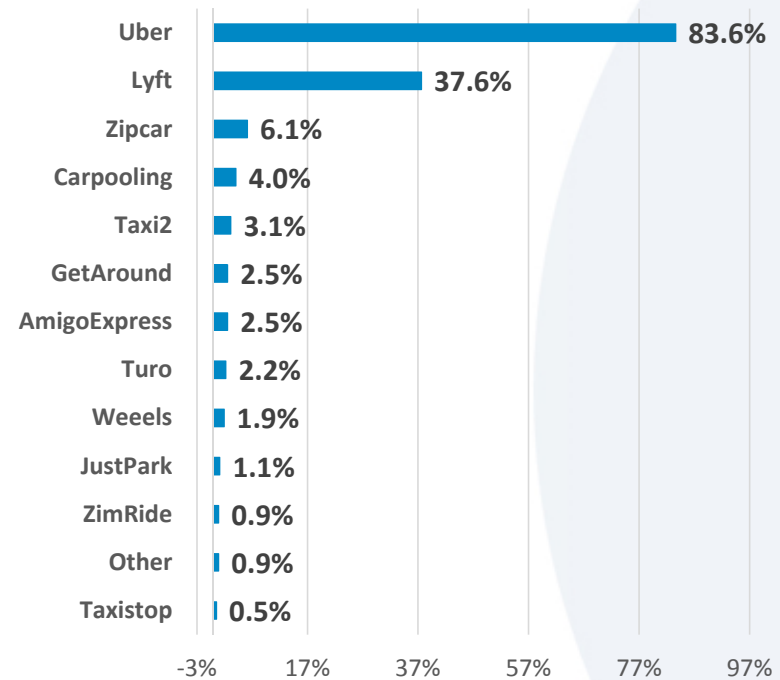


Nearly one in four Connecticut visitors report having used Sharing Economy Transportation in the past, mostly for local transportation and with Uber.

Sharing Economy - Transportation



Sharing Economy Brands Used

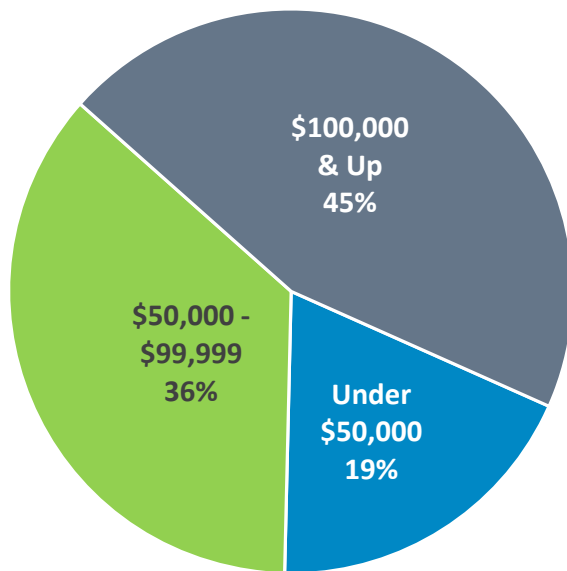


Visitor Demographics

05

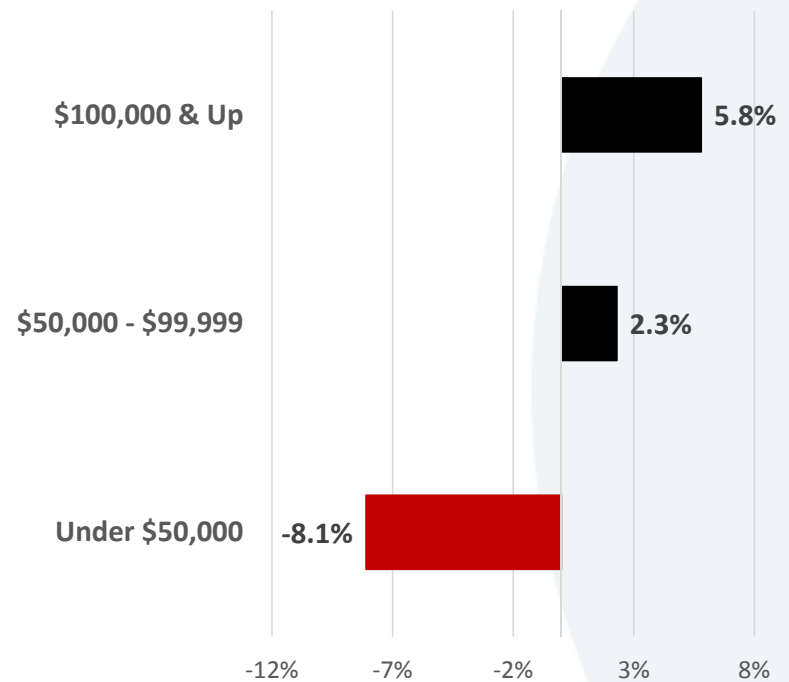
Connecticut travelers earned an average household income of \$99.4k last year compared to comp set travelers at \$89.5k.

Household Income

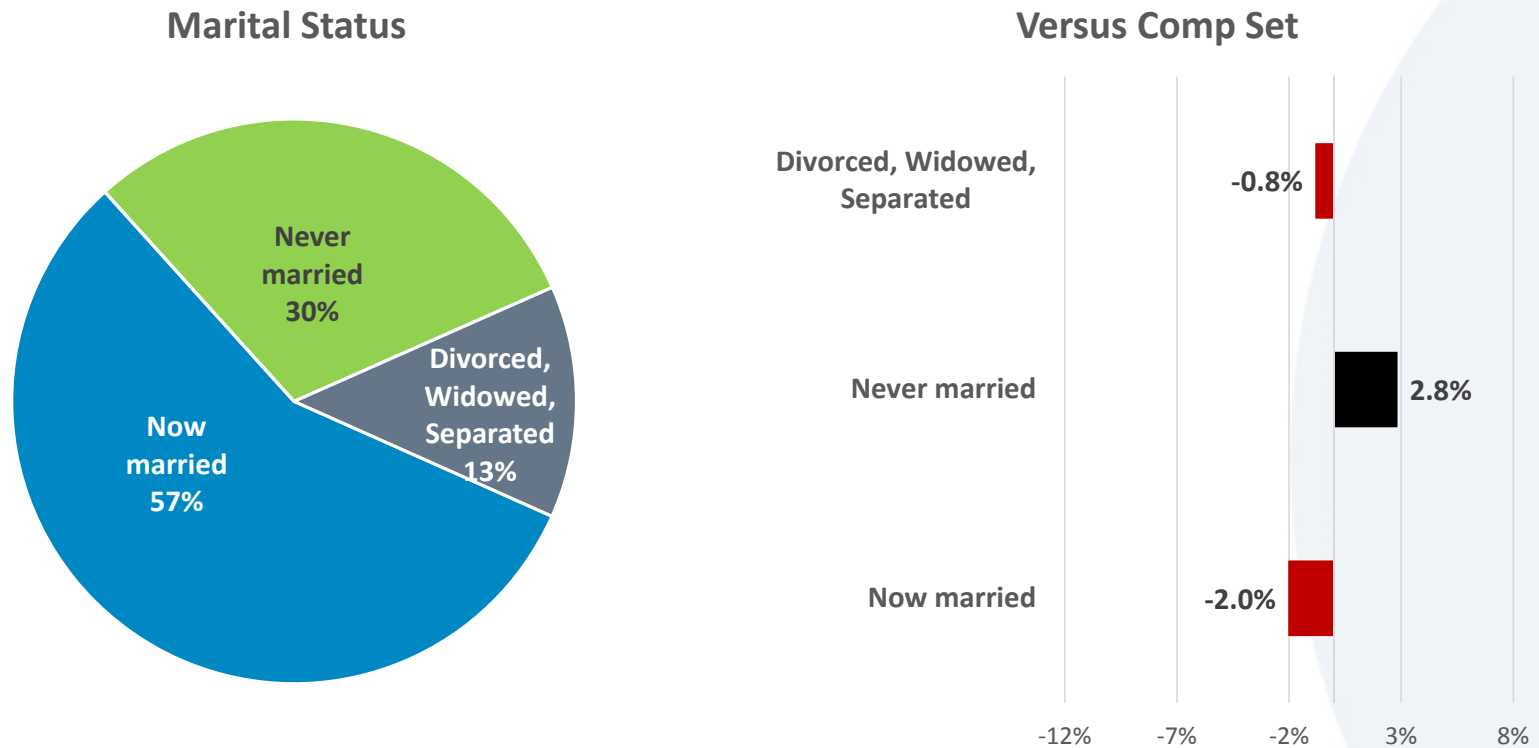


Average = \$99.4k vs \$89.5k among comp set
Median = \$82.1k vs \$72.7k among comp set

Versus Comp Set

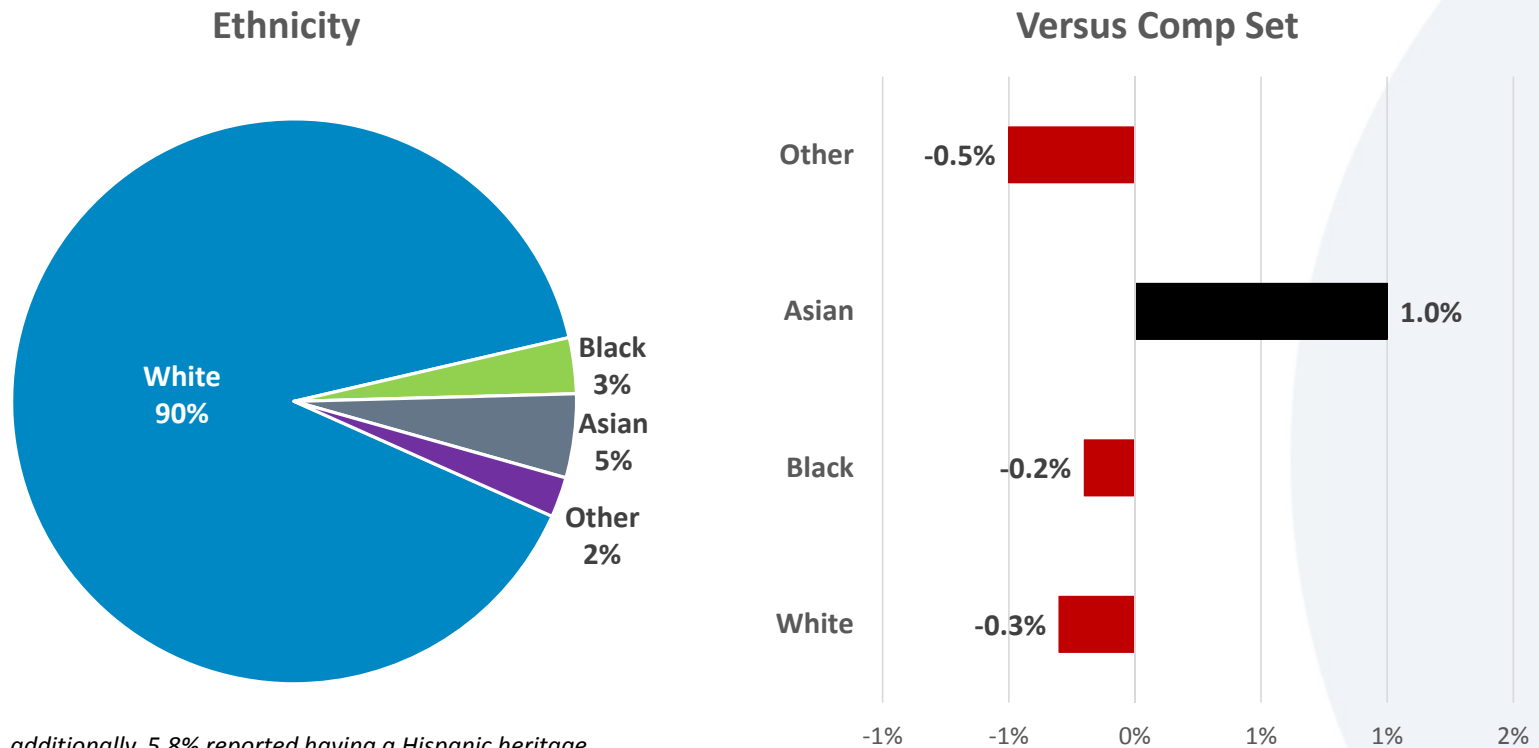


Most 2017 Connecticut travelers were married, but compared to other state's visitors it was the "never married" segment that stands out.



SOURCE: OmniTrak, "TravelTrakAmerica," 2017

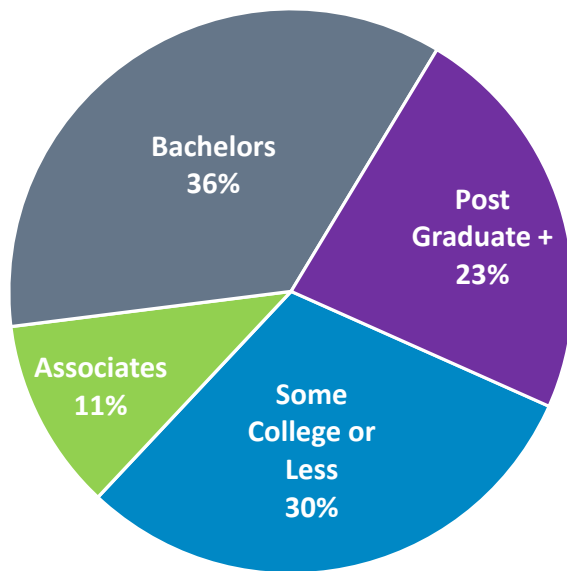
Most Connecticut visitors last year were White/Caucasian. However, compared to travelers to other New England states, Connecticut travelers are somewhat more likely to be Asian or Pacific Islander.



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

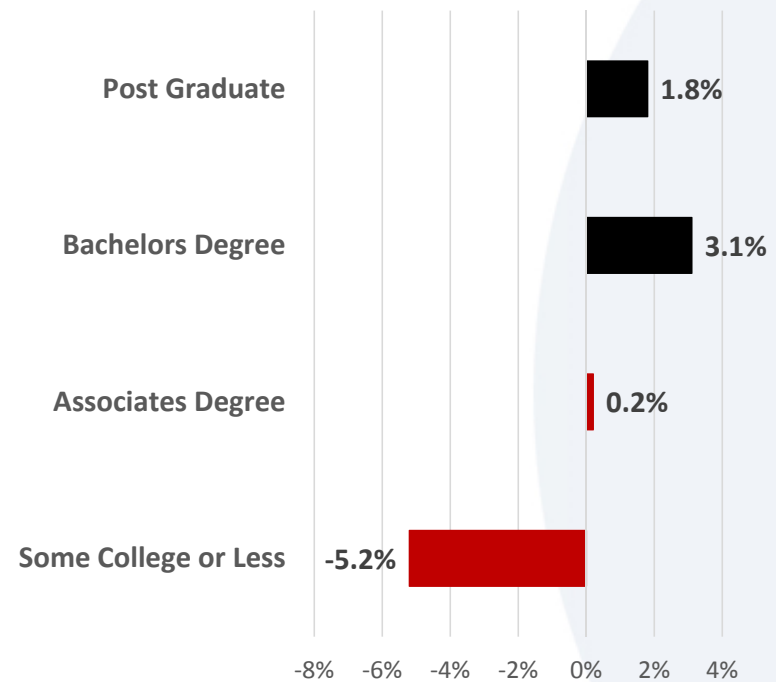
Nearly 6 in 10 Connecticut travelers have college degrees or better, about 5 points higher than that observed among the comp set.

Educational Attainment



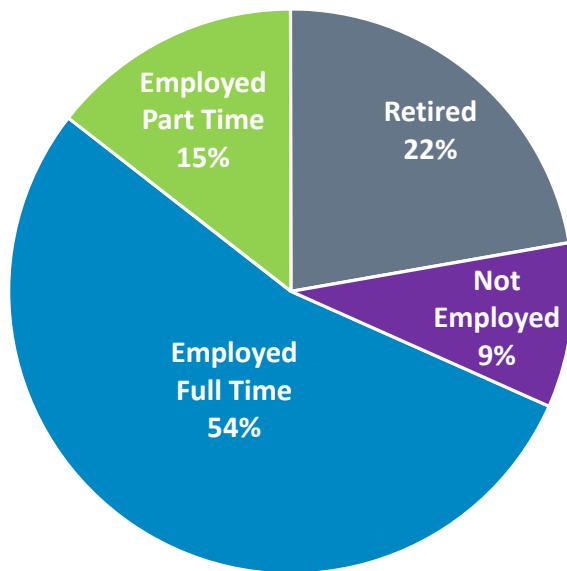
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Versus Comp Set



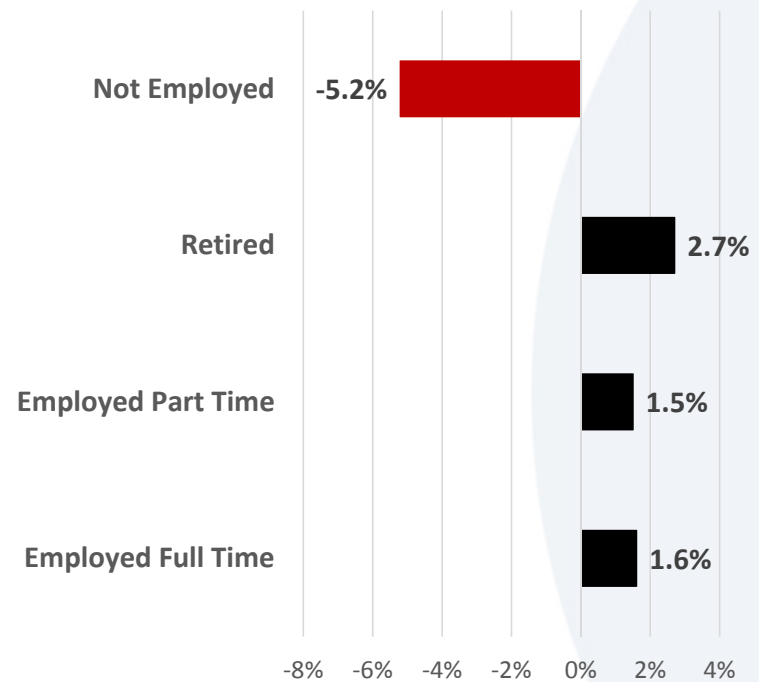
Nearly 70% of Connecticut's visitors last year were employed either full or part-time, and they are more likely to be employed than other states' visitors.

Employment Status



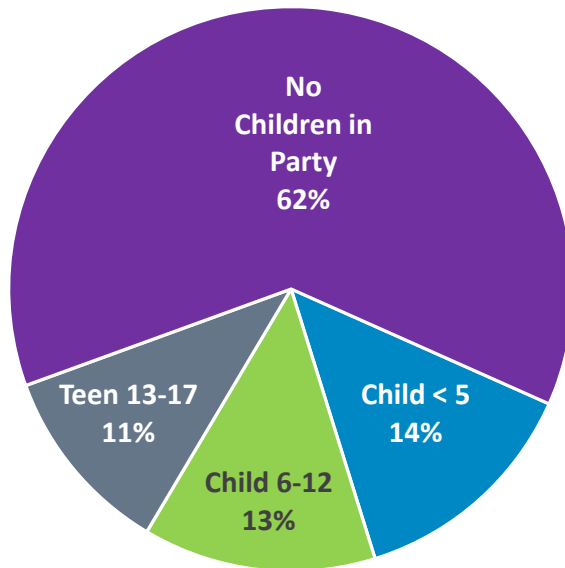
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Versus Comp Set

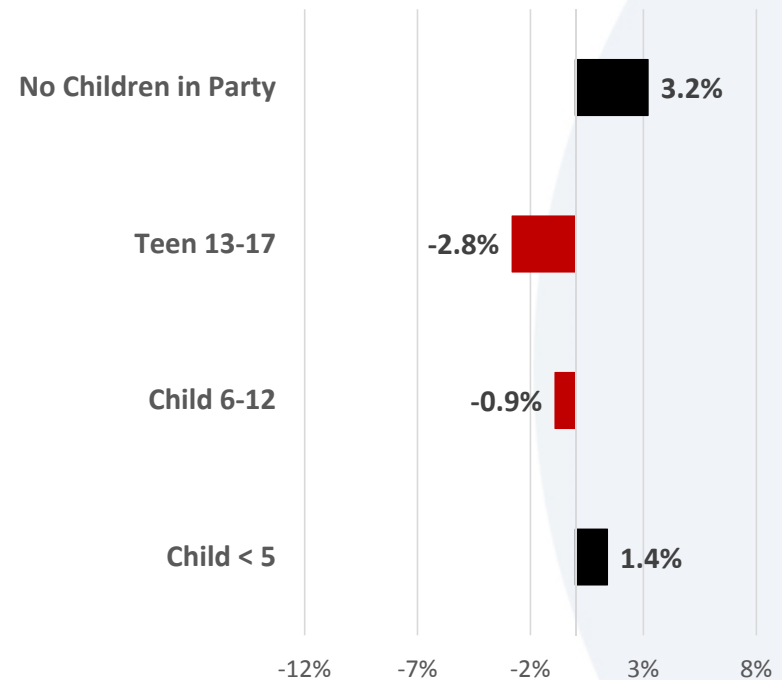


Nearly one-third (31%) of Connecticut visitors last year had children in their parties. However, the state was more likely to attract adult couples than other states in the comp set.

Presence of Children

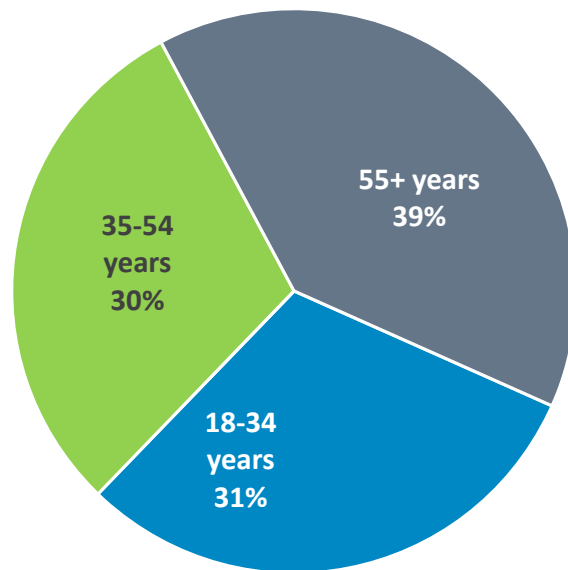


Versus Comp Set

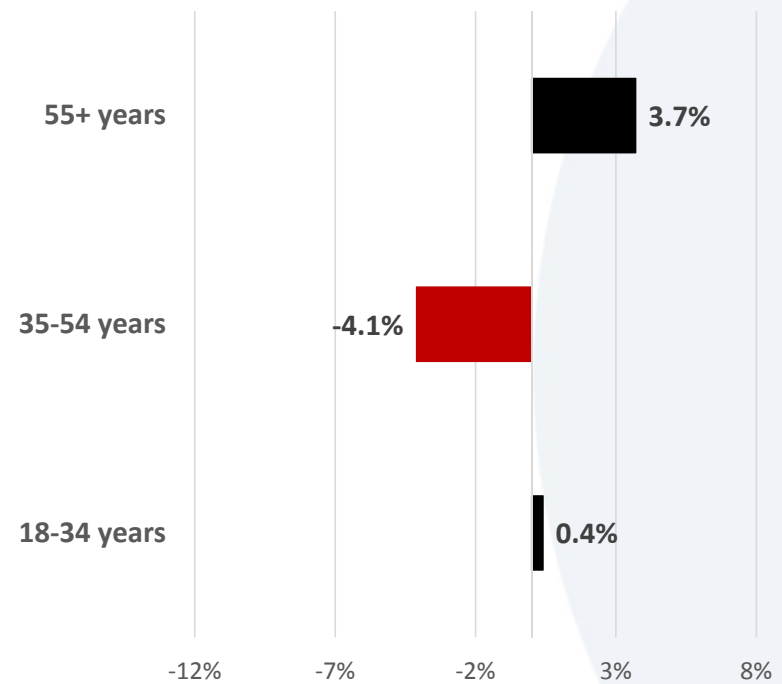


Last year the average Connecticut Traveler survey respondent was 47.8 years old, or 1.0 year old than travelers in the overarching comp set.

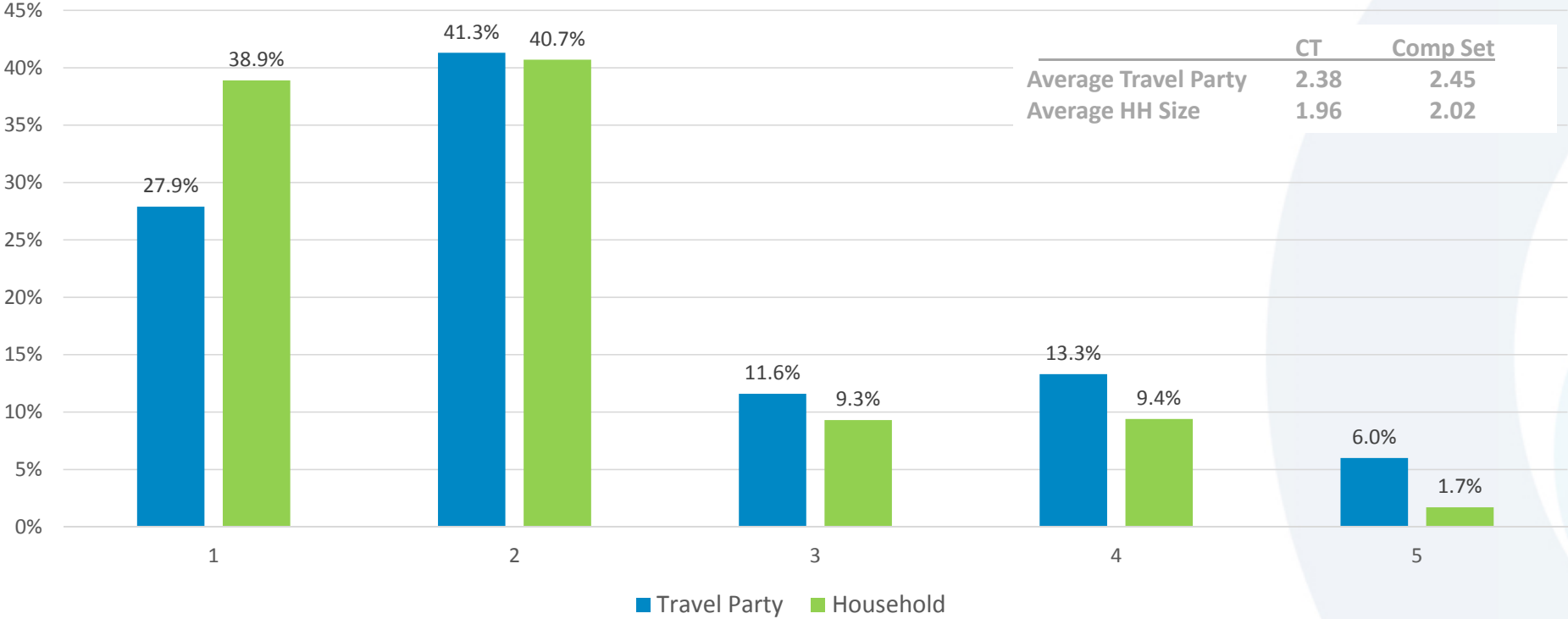
Age of Respondent



Versus Comp Set

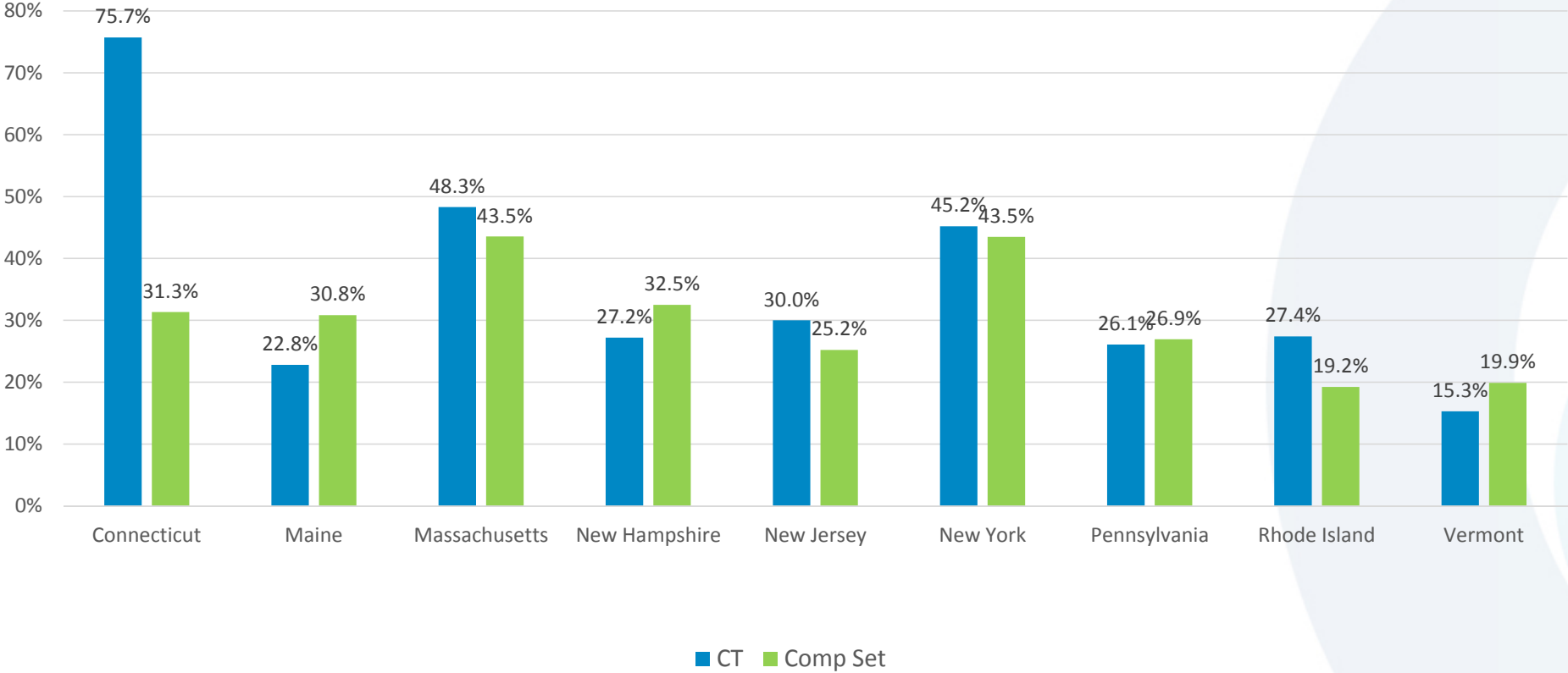


Connecticut’s average travel party size in 2017 was 2.38 people. And, an average of 1.96 or 82% came from the same household.



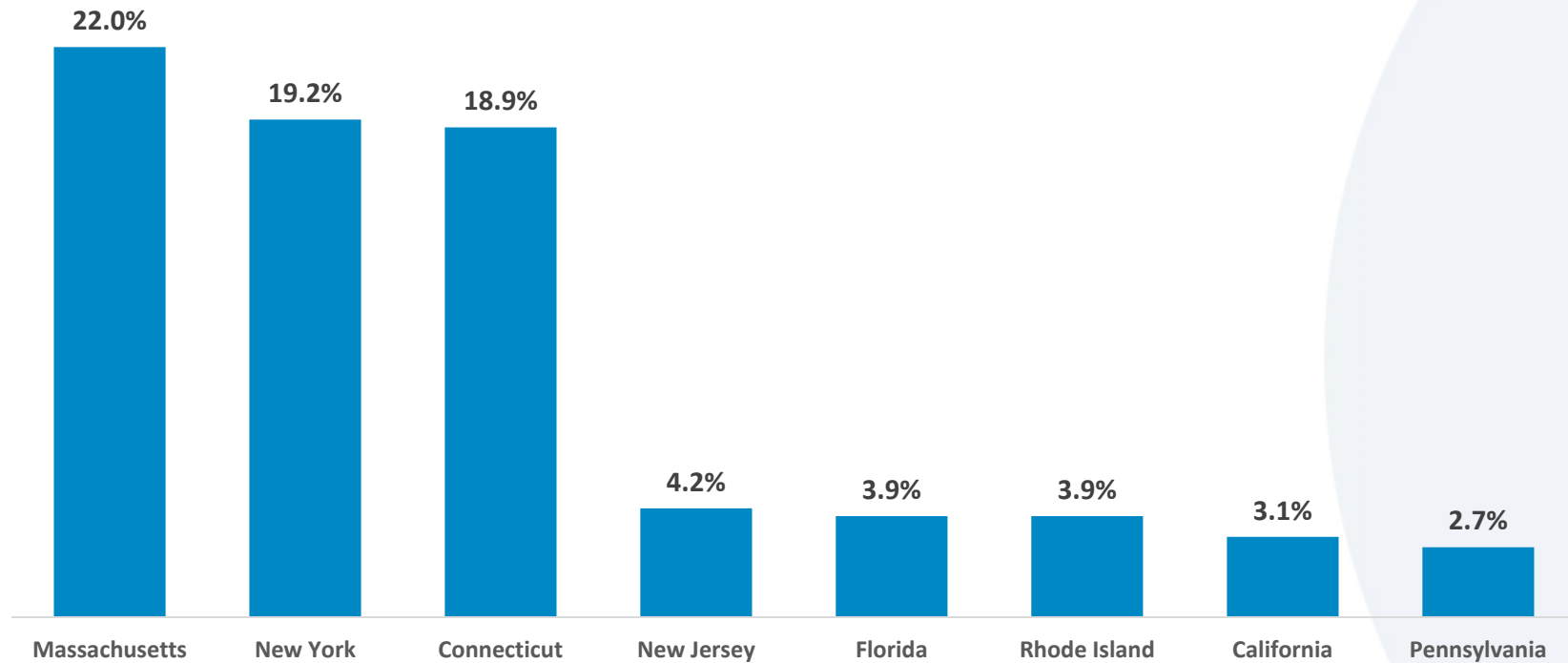
SOURCE: OmniTrak, "TravelTrakAmerica," 2017

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.



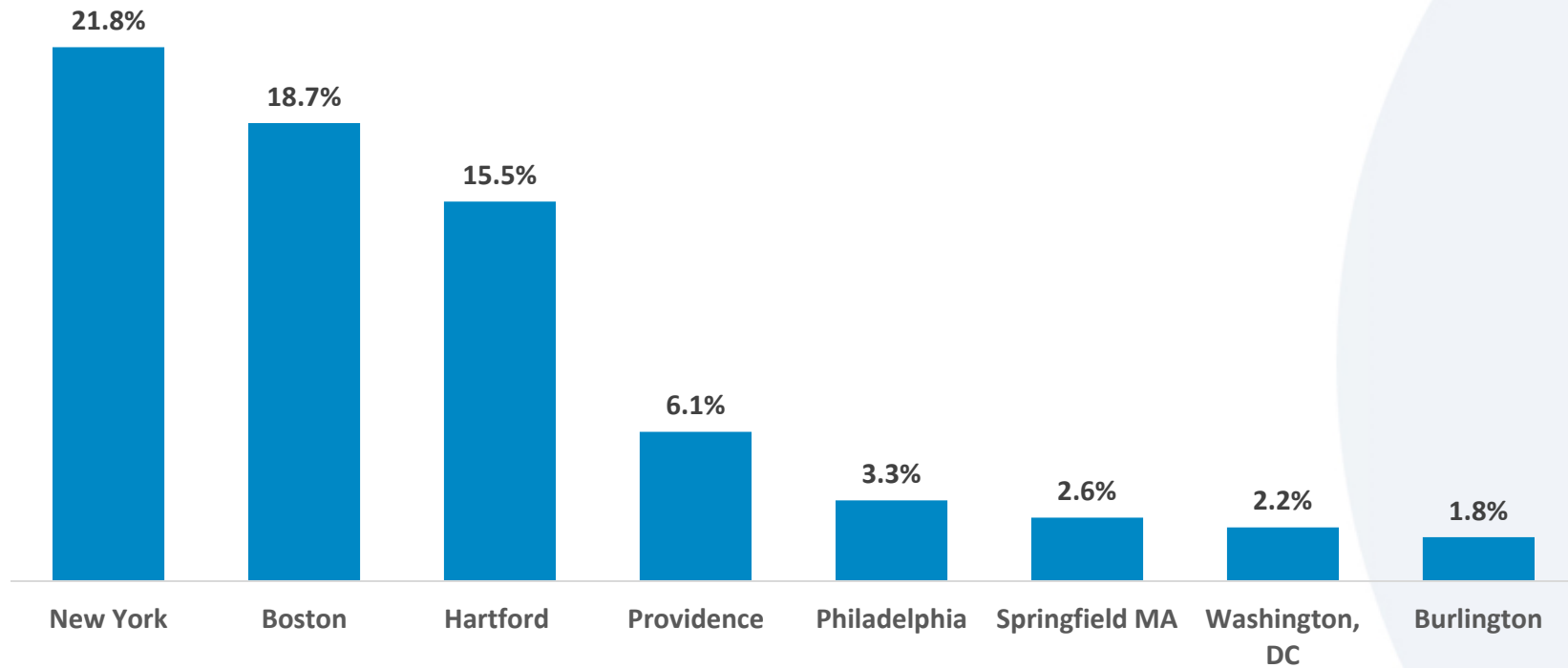
SOURCE: OmniTrak, "TravelTrakAmerica," 2017

The states that generated the most travelers to Connecticut last year included Massachusetts, New York and Connecticut.



SOURCE: OmniTrak, "TravelTrakAmerica," 2017

The individual markets (DMAs) that generated the most visits for Connecticut last year included New York City, Boston and Hartford.



SOURCE: OmniTrak, "TravelTrakAmerica," 2017

Thank You!



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