



The Economic Impact of Travel in Connecticut



For Calendar Year 2015

Connecticut[®]
still revolutionary

Tourism Economics

Adam Sacks, President
Christopher Pike, Director
303 Lancaster Avenue, Suite 2E
Wayne PA 19087, USA
Tel: +1 610 995 9600



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Table of Contents

- Conceptual overview
- Overview
- Traveler spending
- Total economic impact
- The importance of tourism in Connecticut in context
- Regional analysis
- Methodology and background

Conceptual Overview



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Why quantify the tourism economy?

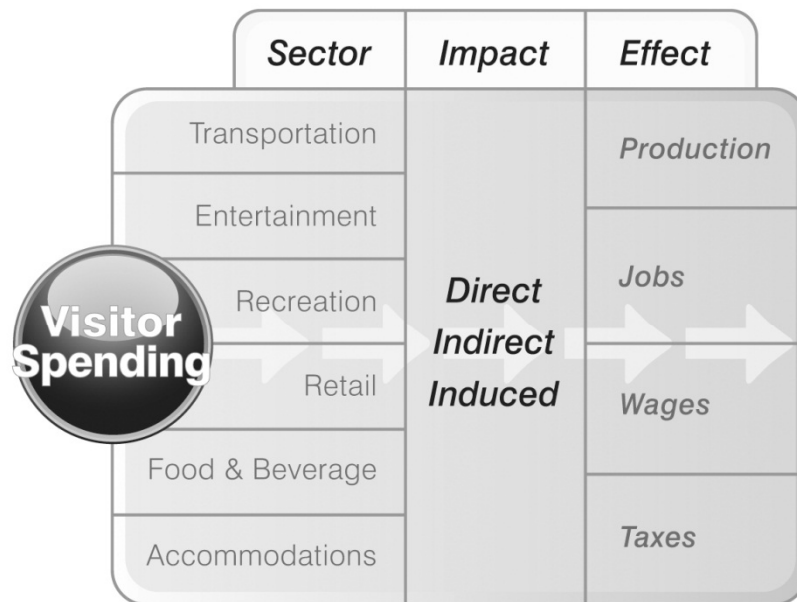
- By monitoring tourism's economic impact, policy makers can make informed decisions regarding the funding and prioritization of tourism development.
- It can also carefully monitor its successes and future needs.
- In order to do this, tourism must be measured in the same categories as other economic sectors – i.e. tax generation, employment, wages, and gross domestic product.

Why is this a challenge?

- Most economic sectors, such as financial services, insurance, or construction, are easily defined within a country's national accounts statistics.
- Tourism is not as easily measured because it is not a single industry. It is a demand-side activity which affects multiple sectors to varying degrees.
- Tourism spans nearly a dozen sectors, including: lodging, recreation, retail, real estate, air passenger transport, food & beverage, car rental, taxi services, travel agents...

How visitor spending generates impact

- Travelers create direct economic value within a discrete group of sectors (e.g. recreation, transportation). This supports a relative proportion of jobs, wages, and taxes within each sector.
- Each directly affected sector also purchases goods and services as inputs (e.g. food wholesalers, utilities) into production. These impacts are called indirect impacts.



- Lastly, the induced impact is generated when employees whose incomes are generated either directly or indirectly by tourism, spend those incomes in the Connecticut economy.

Illustrating the concepts

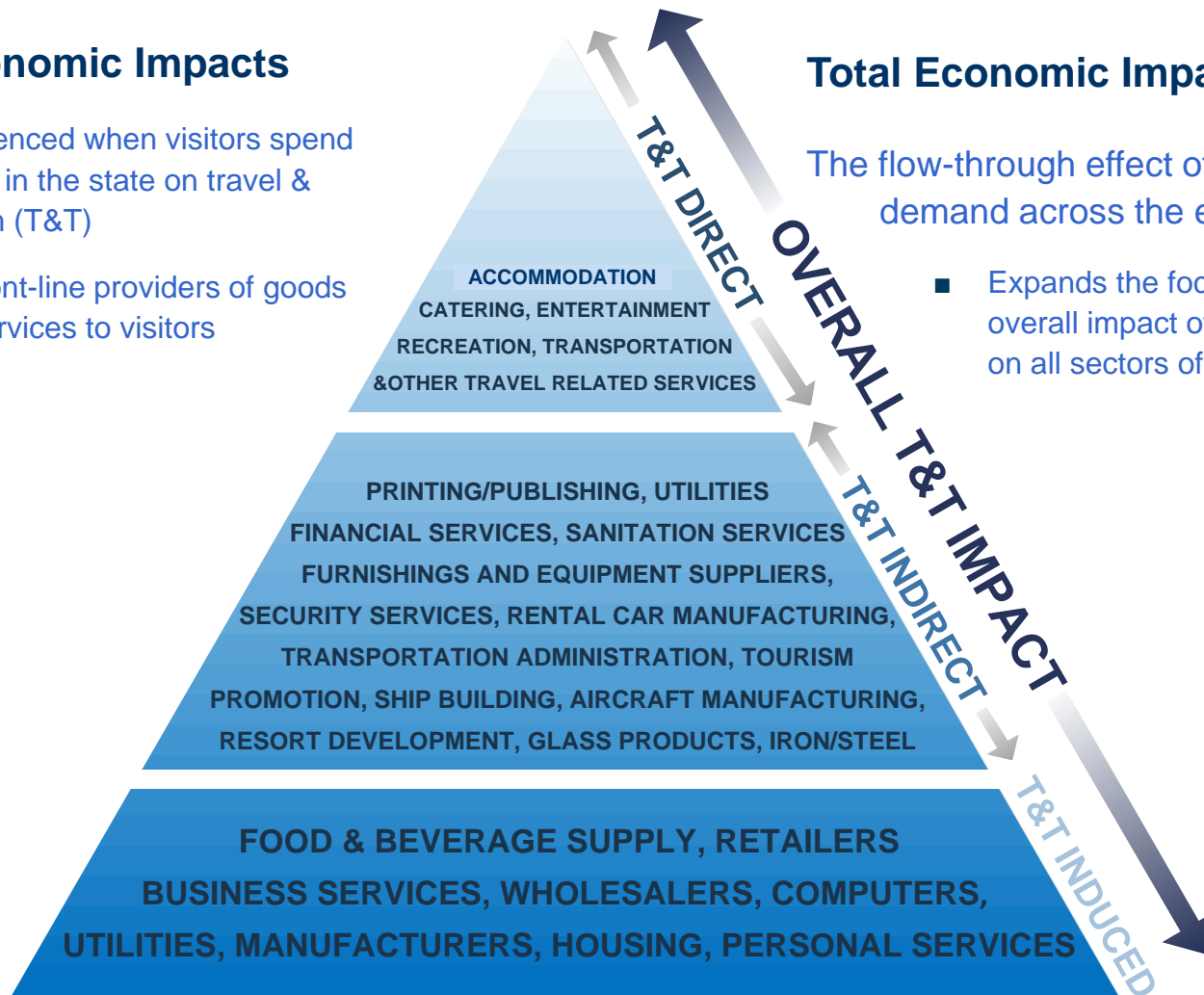
Direct Economic Impacts

- Experienced when visitors spend money in the state on travel & tourism (T&T)
- The front-line providers of goods and services to visitors

Total Economic Impacts

The flow-through effect of all tourism demand across the economy

- Expands the focus to measure the overall impact of travel & tourism (T&T) on all sectors of the economy



Overview



2015 Highlights

Traveler Spending

- Traveler spending accelerated in 2015 to 3.0%, up from 2.2% growth in 2014. Non-casino travel spending increased 4.4% in 2015.
- Traveler spending of \$8.7 billion generated \$14.7 billion in total business sales in 2015 as travel dollars flowed through the state's economy.
- Traveler spending growth was led by spending growth in the F&B and lodging sectors.

2015 Highlights

Jobs

- A total of 121,527 jobs, with associated income of \$5.2 billion, were sustained by travelers to Connecticut last year.
- Traveler-supported employment represents 5.3% of all employment in the state of Connecticut.

Taxes

- Including indirect and induced impacts, travel in Connecticut generated \$910 million in state and local taxes, and \$778 million in federal taxes in 2015.
- In the absence of state and local taxes generated by travelers, each Connecticut household would need to pay \$675 to fill the gap.

Traveler Spending

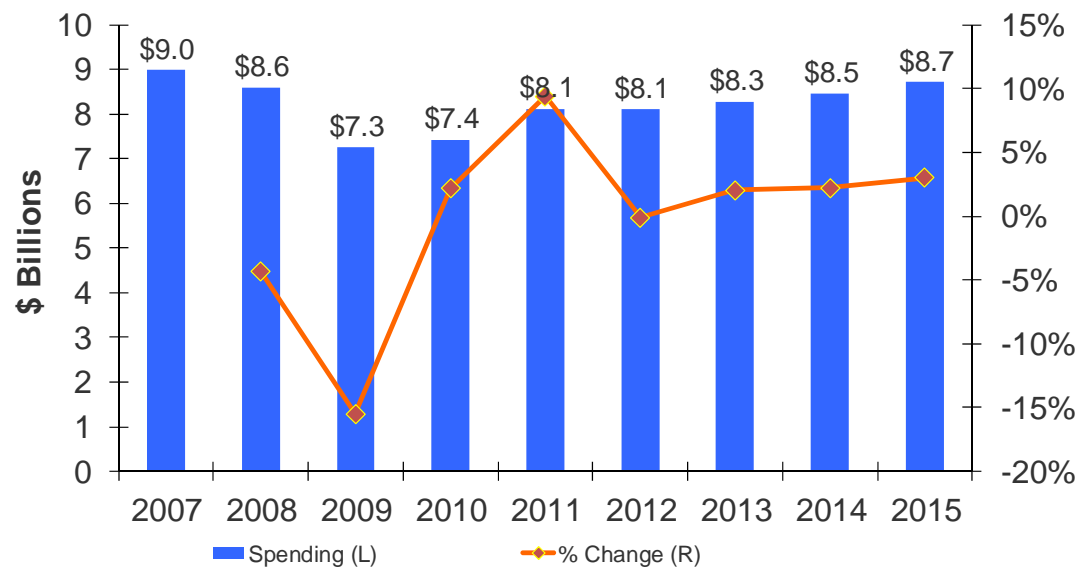


Continued Traveler spending growth

- Traveler spending grew 3.0% in 2015 to reach \$8.7 billion.
- Traveler spending growth has averaged 3.3% per annum over the past five years.
- Traveler spending has increased by \$1.5 billion since the recession – 20% higher in 2015 than in 2009.

Connecticut Traveler Spending

US\$ Billions



Sources: Longwoods International, NTTU, Tourism Economics

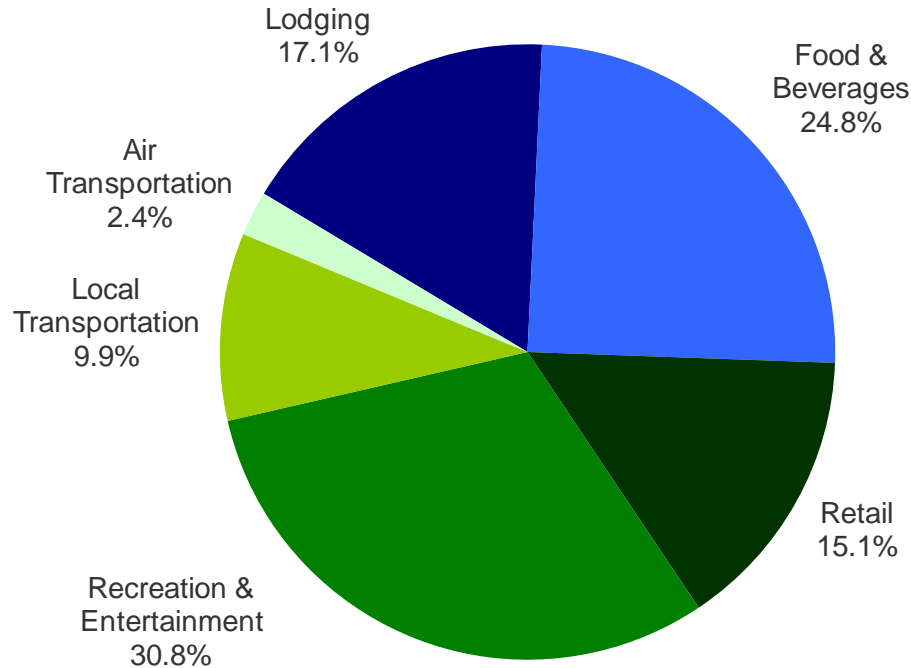
Visitor spending by category

- Traveler spending increased by 3.0% in 2015, supported mainly by growth in the F&B and lodging sectors.
- Recreational spending was held down by the decline in casino gaming.
- Transportation spending growth was capped by the sharp decline in gas prices.

Traveler Spending										
(US\$ Million)										
Sector	2007	2008	2009	2010	2011	2012	2013	2014	2015	% Change
Lodging	\$1,261	\$1,277	\$1,111	\$1,185	\$1,314	\$1,350	\$1,401	\$1,427	\$1,494	4.7%
Food & Beverages	\$1,753	\$1,676	\$1,391	\$1,459	\$1,677	\$1,730	\$1,831	\$1,981	\$2,163	9.2%
Retail	\$1,088	\$1,125	\$973	\$1,018	\$1,173	\$1,178	\$1,239	\$1,297	\$1,312	1.2%
Recreation & Entertainment	\$3,679	\$3,416	\$2,951	\$2,882	\$2,964	\$2,871	\$2,814	\$2,697	\$2,685	-0.5%
Local Transportation	\$1,030	\$913	\$683	\$704	\$802	\$788	\$796	\$853	\$859	0.7%
Air Transportation	\$175	\$186	\$155	\$175	\$193	\$196	\$200	\$208	\$205	-1.2%
TOTAL	\$8,986	\$8,593	\$7,264	\$7,423	\$8,123	\$8,113	\$8,280	\$8,464	\$8,719	3.0%
% Change		-4.4%	-15.5%	2.2%	9.4%	-0.1%	2.1%	2.2%	3.0%	

Traveler spending by sector

Connecticut Traveler Spending



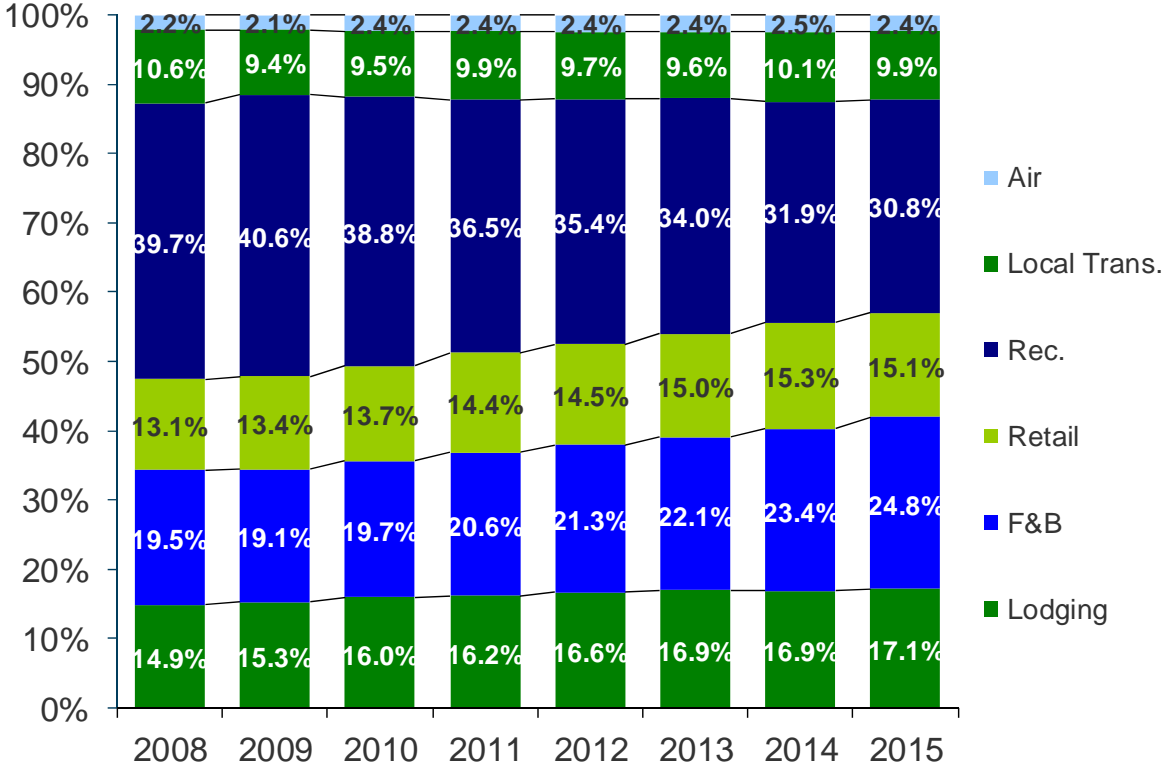
Sources: Longwoods International, NTTU, Tourism Economics

- Recreational spending represents nearly 31% of all traveler spending.
- With growth in both occupancy and room rates, the share of the traveler dollar spent on lodging has grown to 17.1% in 2015.
- Food & beverage purchases represent a quarter of every traveler dollar.

Traveler spending by sector

Connecticut Traveler Spending

by Year, Share of Total



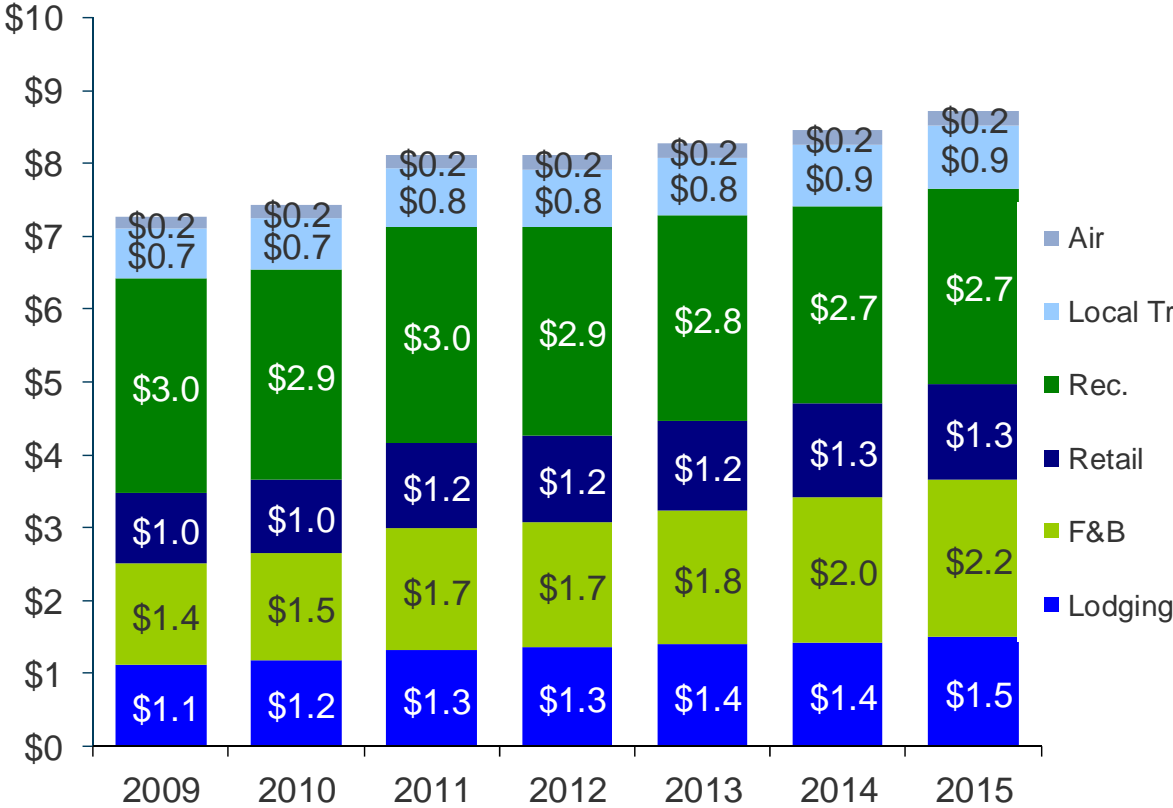
- The recreational share of traveling spending is dominated by casino wagers – as more dollars are spent in the state outside of the casinos and fewer dollars spent in the casinos, the share of the traveler dollar spent on recreational activities has fallen to under 31% in 2015.

Sources: Longwoods International, NTTO, Tourism Economics

Traveler spending by sector

Connecticut Traveler Spending

by Year, Billions of \$



Sources: Longwoods International, NTTO, Tourism Economics

- Spending grew by \$254 million in 2015 with food & beverage and lodging accounting for the majority of the growth.

- Lodging spending increased by \$67 million.

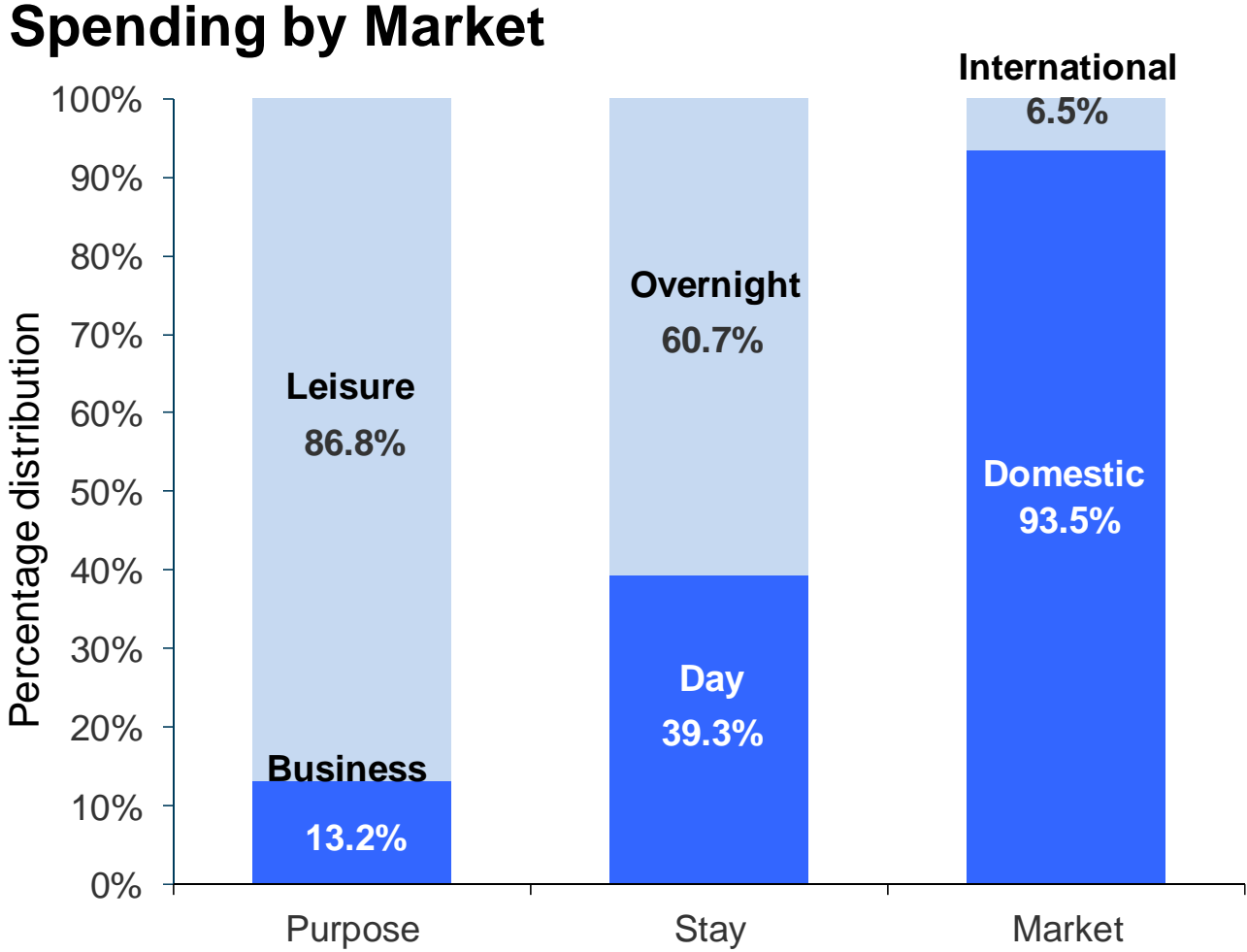
F&B: Food & Beverages
 Retail: Retail Shopping
 Lodging: Accommodations Sales
 Trans: Non-Air Transportation
 Rec: Recreation & Entertainment
 2nd homes: 2nd Home Rental Spending
 Air: Air Transportation Spending

Traveler spending by market segment

- Business travel accounts for 13% of all traveler spending.
- Day travelers in Connecticut spent \$3.4 billion in 2015; 39.3% of the total.
- Domestic travelers represent 93.5% of all traveler spending.

Traveler Spending in 2015					
(US\$ Billion)					
Purpose		Stay		Market	
Business	\$1.15	Day	\$3.43	Domestic	\$8.15
Leisure	\$7.57	Overnight	\$5.29	Overseas	\$0.57
Total	\$8.72	Total	\$8.72	Total	\$8.72
Share					
Purpose		Stay		Market	
Business	13.2%	Day	39.3%	Domestic	93.5%
Leisure	86.8%	Overnight	60.7%	Overseas	6.5%
Growth					
Business	4.8%	Day	5.4%	Domestic	3.5%
Leisure	2.7%	Overnight	1.5%	Overseas	-3.7%

Traveler spending by market segment



Sources: Longwoods International, NTTO, Tourism Economics

Translating sales into impact

Direct Economic Impact

The first round of impacts to industries providing goods and services to travelers

Narrow measure for industry comparisons



Total Economic Impact

Includes indirect (supply chain) and induced (income effects) impacts

The flow-through effect of T&T demand across the economy

- Direct tourism sales flow through the Connecticut economy, generating GDP, jobs, wages, and taxes.
- The indirect impacts measure supply chain (b2b) activity generated by tourism sales.
- The induced impacts measure the effects of tourism-generated incomes that are spent within the state.

Total Economic Impact

What is the direct economic value of tourism-related sectors?



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Travel generated sales

Tourism Sales (US\$ Million)				
	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	-	20.7	10.1	30.8
Construction and Utilities	-	235.5	98.9	334.4
Manufacturing	-	118.3	99.3	217.6
Wholesale Trade	-	68.1	144.2	212.2
Air Transport	205.2	2.6	6.8	214.6
Other Transport	257.8	99.6	49.4	406.8
Retail Trade	1,312.4	9.8	257.2	1,579.4
Gasoline Stations	532.7	0.9	19.4	553.0
Communications	-	222.3	135.2	357.5
Finance, Insurance and Real Estate	443.0	671.2	1,262.8	2,377.0
Business Services	14.0	708.0	274.8	996.7
Education and Health Care	-	4.5	699.0	703.5
Recreation and Entertainment	1,040.3	58.3	40.5	1,139.1
Lodging	1,386.7	1.4	1.5	1,389.7
Food & Beverage	2,163.2	60.9	213.7	2,437.8
Personal Services	202.5	75.7	162.7	440.9
Government	1,158.0	90.3	59.2	1,307.5
TOTAL	8,715.7	2,448.2	3,534.6	14,698.4
Growth Rate (2013-2015)	5.1%	3.9%	3.9%	4.6%

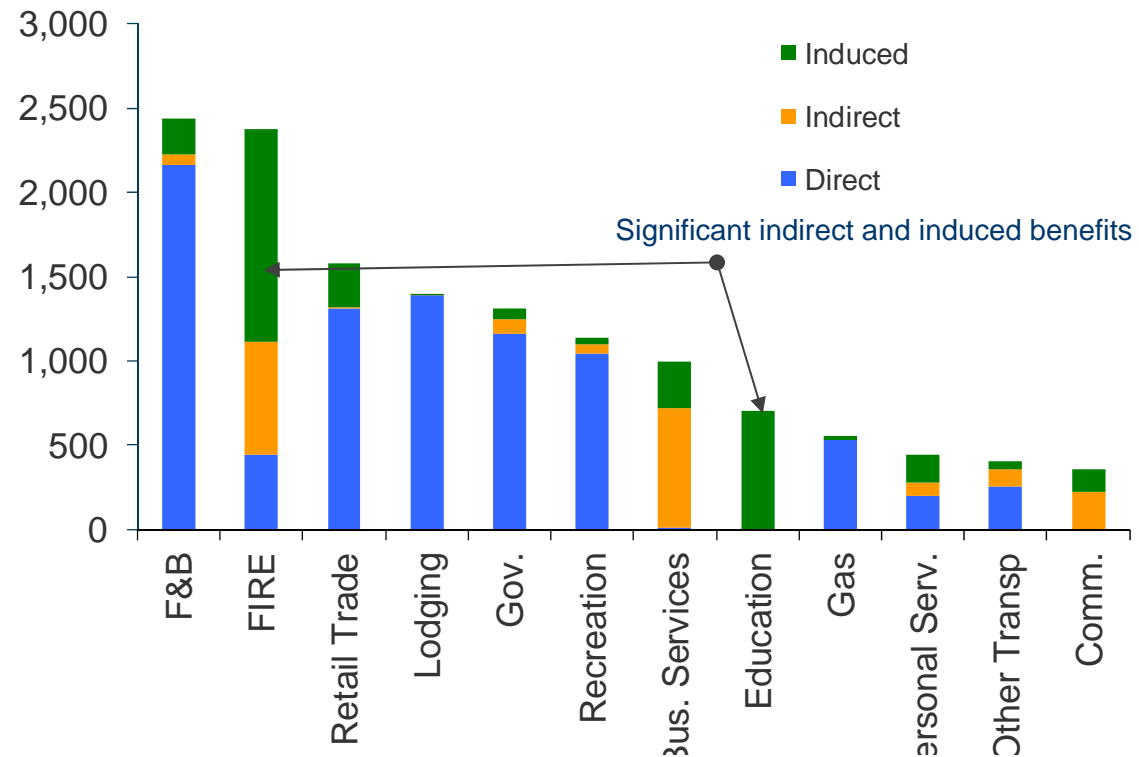
Traveler spending of \$8.7 billion generated a travel generated economic impact of \$14.7 billion in 2015 as traveler dollars flowed through the Connecticut economy.

Travel sales

- All business sectors of the Connecticut economy benefit from tourism activity directly and/or indirectly.
- Sectors that serve the tourism industry, such as business services, gain as suppliers to a dynamic industry.

Tourism Sales by Industry

\$ million



Travel GDP (value added)

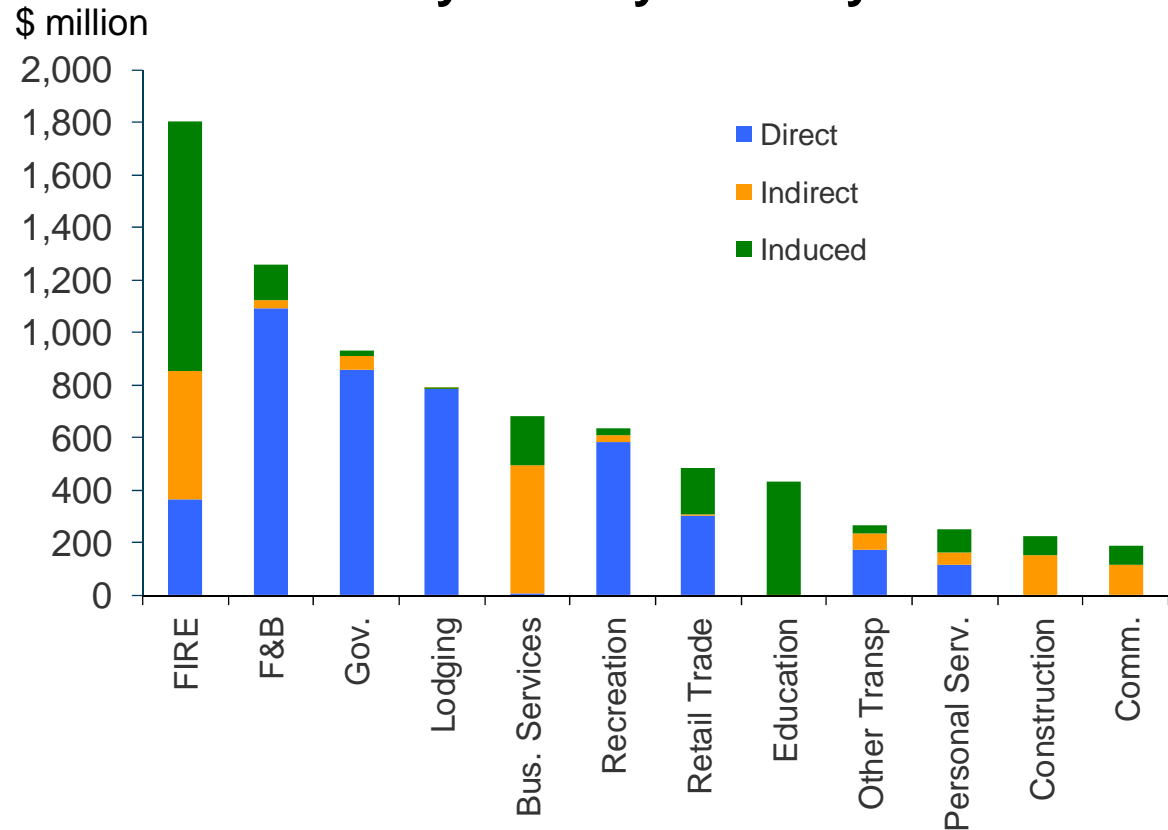
Tourism Economy GDP Impact (US\$ Million)				
	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	-	10.3	5.0	15.2
Construction and Utilities	-	154.1	69.6	223.8
Manufacturing	-	43.7	37.9	81.6
Wholesale Trade	-	59.0	124.4	183.5
Air Transport	88.3	1.1	2.9	92.4
Other Transport	172.0	64.5	31.6	268.1
Retail Trade	302.4	6.8	176.4	485.6
Gasoline Stations	53.7	0.7	13.7	68.0
Communications	-	113.7	75.9	189.6
Finance, Insurance and Real Estate	362.9	493.3	950.1	1,806.4
Business Services	8.6	484.5	189.8	682.8
Education and Health Care	-	2.5	431.7	434.1
Recreation and Entertainment	584.4	27.5	22.9	634.9
Lodging	786.3	0.8	0.9	788.0
Food & Beverage	1,090.4	34.8	132.9	1,258.1
Personal Services	115.1	47.7	89.9	252.7
Government	859.9	49.5	21.0	930.3
TOTAL	4,423.9	1,594.6	2,376.7	8,395.1
Growth Rate (2013-2015)	4.2%	4.3%	3.5%	4.0%

Travel generated \$8.4 billion in state GDP in 2015, representing 3.25% of the total Connecticut economy. This excludes all import leakages to arrive at the economic value generated by travel.

Travel GDP (value added)

- While the food & beverage and lodging industries are key contributors to visitor supported GDP, FIRE (finance, insurance and real estate) and business services -- key industries in the state -- significantly benefit from and contribute to visitor supported GDP in Connecticut.

Tourism Economy GDP by Industry



Why sales and GDP differ

- Tourism industry sales in Connecticut tally \$8.7 billion while direct GDP measures \$4.4 billion.
- GDP (Gross domestic product) is less than sales because it measures only the locally-produced value of goods and services consumed by visitors.
 - This includes the local labor, capital depreciation, and the profits of tourism-related companies that are based in Connecticut.
 - The costs of imported goods (gasoline, food, or retail goods) that come from out-of-state are excluded from the GDP calculation.
 - In addition, business profits from out-of-state companies are also excluded. For example, Wal-Mart profits leave the state.

Travel employment

- The tourism sector supported 121,527 jobs in 2015.
- 5.3% of all employment in Connecticut is supported by visitor spending – one of every 18.8 jobs.

Tourism Economy Employment				
	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	-	156	104	260
Construction and Utilities	-	905	256	1,161
Manufacturing	-	327	181	508
Wholesale Trade	-	317	672	989
Air Transport	687	8	22	717
Other Transport	1,925	867	455	3,247
Retail Trade	7,165	121	3,223	10,509
Gasoline Stations	520	6	133	659
Communications	-	599	357	955
Finance, Insurance and Real Estate	297	2,936	3,377	6,610
Business Services	74	5,300	2,143	7,518
Education and Health Care	-	63	6,504	6,567
Recreation and Entertainment	17,757	1,199	793	19,749
Lodging	13,391	13	15	13,419
Food & Beverage	29,544	933	3,324	33,800
Personal Services	2,143	732	2,038	4,914
Government	9,185	524	237	9,945
TOTAL	82,688	15,006	23,832	121,527
Growth Rate (2013-2015)	2.5%	2.5%	2.3%	2.5%

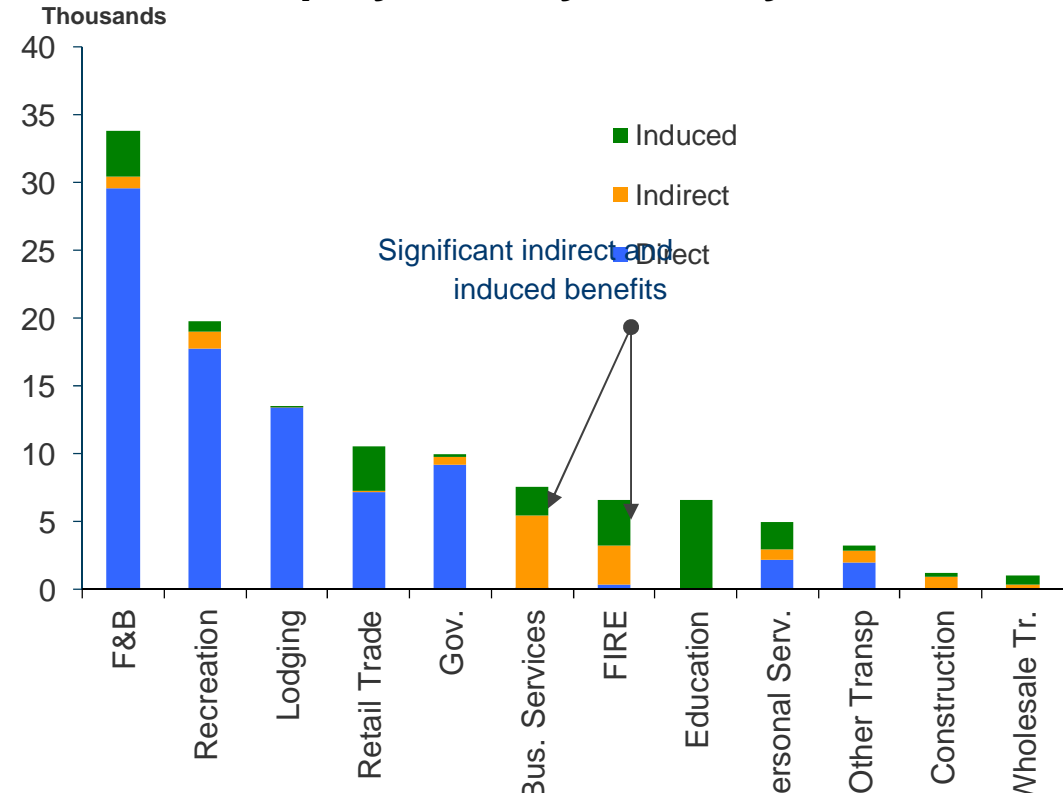
Indirect impacts quantify the supply chain to those industries directly providing goods or services to travelers.

Induced impacts are generated when employees whose incomes are generated either directly or indirectly by travel, spend those incomes in the state economy.

Travel employment

- Travel is an employment intensive industry directly supporting 33,800 jobs in the food & beverage industry.
- Travel spending supported a total of more than 13,400 jobs in the lodging industry.
- Secondary benefits are realized across the entire economy through the supply chain and incomes as they are spent.

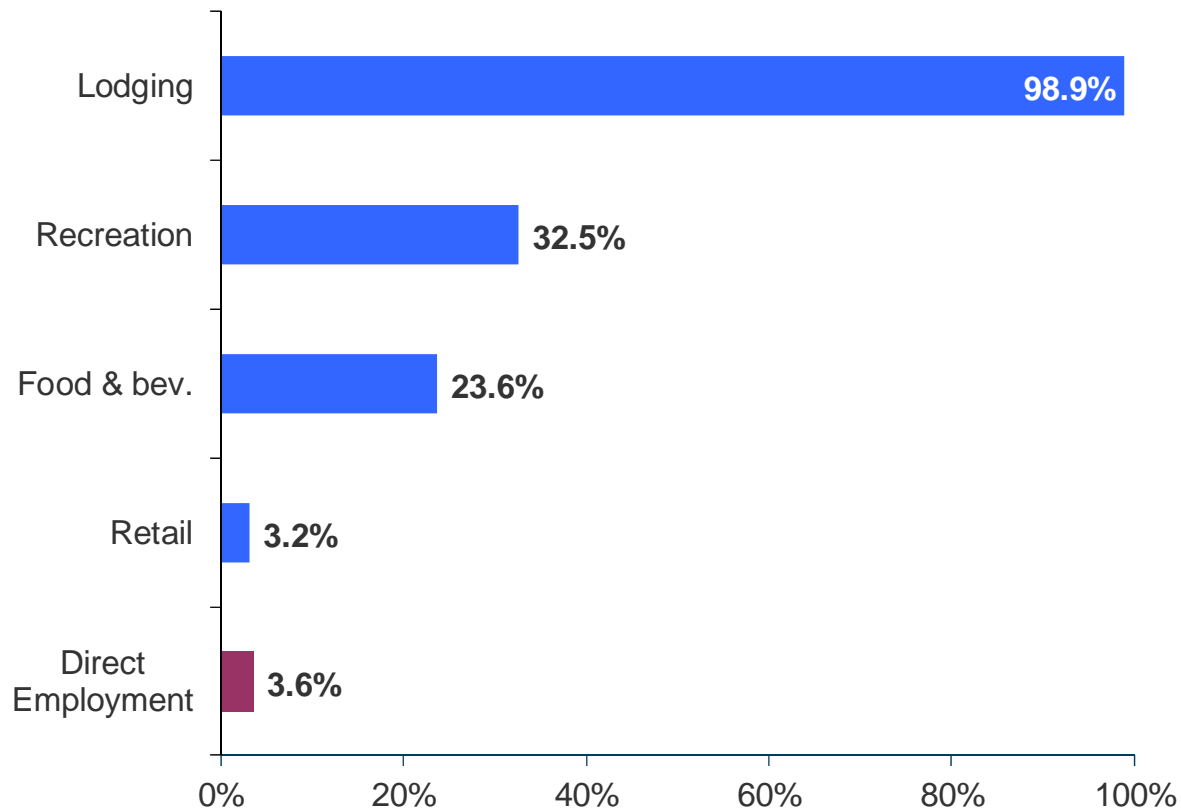
Tourism Employment by Industry



Travel employment intensity

- Tourism is a significant part of several industries – 100% of lodging, 33% of recreation, and 24% of food & beverage employment is supported by tourism spending.

Tourism Employment Intensity by Industry



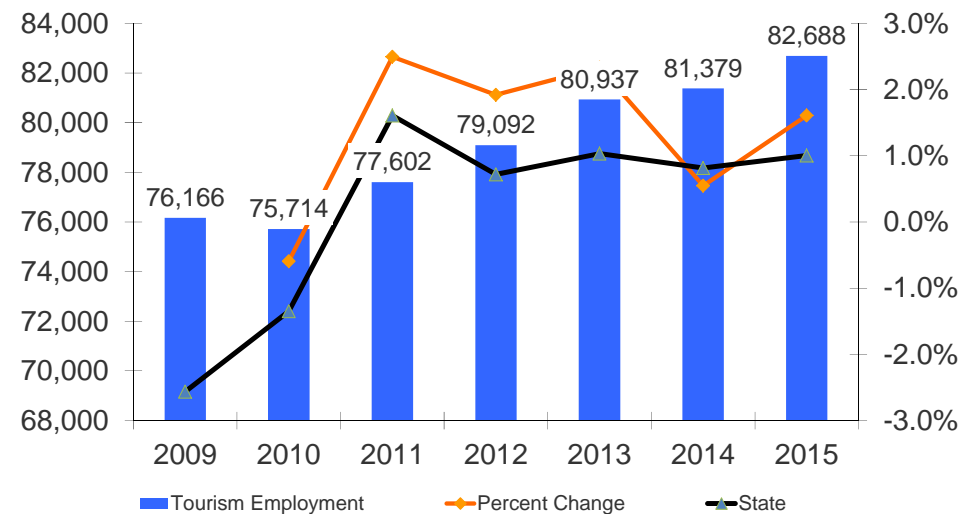
Travel employment growth

Tourism Employment							
	2009	2010	2011	2012	2013	2014	2015
Tourism Employment	76,166	75,714	77,602	79,092	80,937	81,379	82,688
Percent Change		-0.6%	2.5%	1.9%	2.3%	0.5%	1.6%

- Tourism employment grew 1.6% in 2015, posting five straight years of employment growth.
- Tourism employment outpaced overall employment growth in 2015 by 0.6 percentage points.

Tourism Employment

Number of Jobs



Source: Tourism Economics

Tourism ranking

- Were tourism an industry as defined by the government, tourism employment would rank as the 8th largest industry in Connecticut.

Employment Ranking State of Connecticut		
Rank	Industry	Employment (000s)
1	Health care and social assistance	259.3
2	Retail trade	183.5
3	Manufacturing	163.8
4	Accommodation and food services	121.8
5	Finance and insurance	112.7
6	Professional, scientific, and technical services	90.4
7	Administrative and waste management services	85.0
8	Tourism	82.7
9	Wholesale trade	63.3
10	Educational services	62.6
11	Other services, except public administration	62.1
12	Construction	53.8
13	Transportation and warehousing	44.4
14	Information	31.9
15	Management of companies and enterprises	29.2

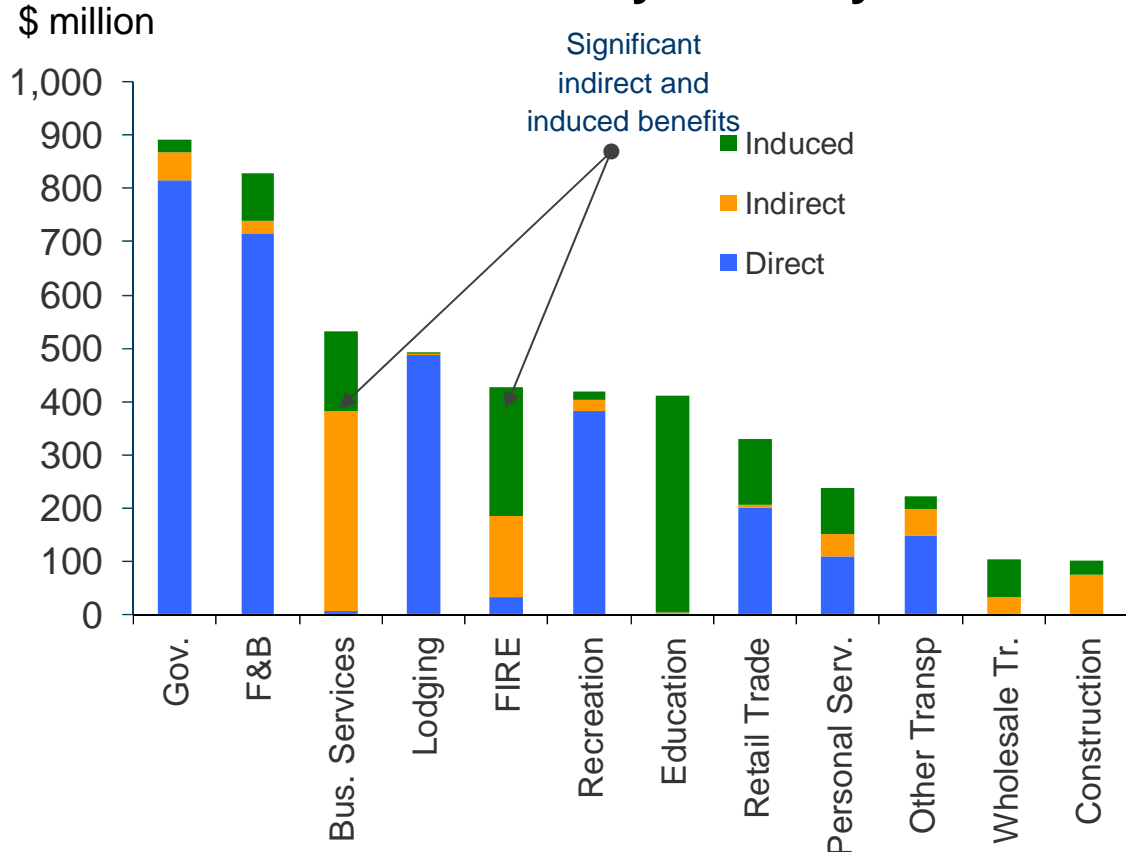
Travel personal income

Tourism Labor Income (Compensation)				
(US\$ Million)				
	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	-	7.4	3.9	11.3
Construction and Utilities	-	73.9	27.2	101.1
Manufacturing	-	26.6	16.8	43.4
Wholesale Trade	-	33.4	70.8	104.2
Air Transport	52.4	0.7	1.7	54.8
Other Transport	148.3	50.1	24.0	222.4
Retail Trade	200.5	4.8	123.7	329.0
Gasoline Stations	31.9	0.4	8.2	40.4
Communications	-	56.4	31.2	87.6
Finance, Insurance and Real Estate	31.5	153.3	241.9	426.7
Business Services	4.8	377.4	148.9	531.2
Education and Health Care	-	2.4	407.5	410.0
Recreation and Entertainment	382.3	21.5	15.4	419.2
Lodging	488.2	0.4	0.5	489.2
Food & Beverage	716.4	22.7	88.9	828.0
Personal Services	107.5	43.2	86.0	236.7
Government	814.8	52.4	23.8	891.0
TOTAL	2,978.7	927.1	1,320.4	5,226.1
Growth Rate (2013-2015)	4.3%	4.0%	3.5%	4.1%

Travel personal income

- Significant employment in F&B and lodging drives high labor income in those industries.
- Above average wages drive labor income in supplier industries such as business services.
- The average labor income of workers directly supported by traveler spending was \$36,900 in 2015.

Tourism Labor Income by Industry



Travel tax generation

Traveler-Generated Tax Revenues			
(US\$ Million, 2015)			
	Direct	Indirect/ Induced	Total
Federal	422.3	356.1	778.4
Personal Income	14.0	17.1	31.1
Corporate	74.5	98.9	173.4
Indirect business	52.0	42.6	94.6
Social Security	281.8	197.4	479.2
State and Local	538.5	371.1	909.7
Sales	97.4	106.6	203.9
Bed Taxes	117.2	-	117.2
Personal Income	77.4	58.6	136.0
Corporate	9.0	12.0	21.0
Social Security	3.0	2.1	5.1
Excise and Fees	33.6	26.6	60.3
Property	201.0	165.2	366.2
TOTAL	960.8	727.2	1,688.0

- Tax revenue as a result of visitor activity reached \$1.7 billion in 2015.
- State and local taxes alone tallied \$910 million in 2015.
- \$540 million in state and local tax revenue was a **DIRECT** result of visitor activity in the state.
- Each household in Connecticut would need to be taxed an additional \$675 per year to replace the traveler taxes received by state and local governments.

The importance of tourism in Connecticut in context



How important is tourism?

- Were the Connecticut tourism industry a single business, it would rank #323 on the Fortune 500 list, larger than Pacific Life, Jarden, or Avis.



How important is tourism?

- The 82,700 direct tourism jobs are nearly enough for every resident of Danbury.
- The 121,000 total jobs supported by tourism in Connecticut is larger than Amazon's 2016 seasonal job creation.



How important is tourism?

- The \$910 million in state and local revenues from visitor activity represents \$675 per household in Connecticut – which would pay for two months of commuting costs on Metro-North from Stamford or Norwalk.

- \$675 per household also took care of one person's Christmas shopping and decorations in 2015 as the average American spent \$600 on gifts and another \$75 on holiday decorations.



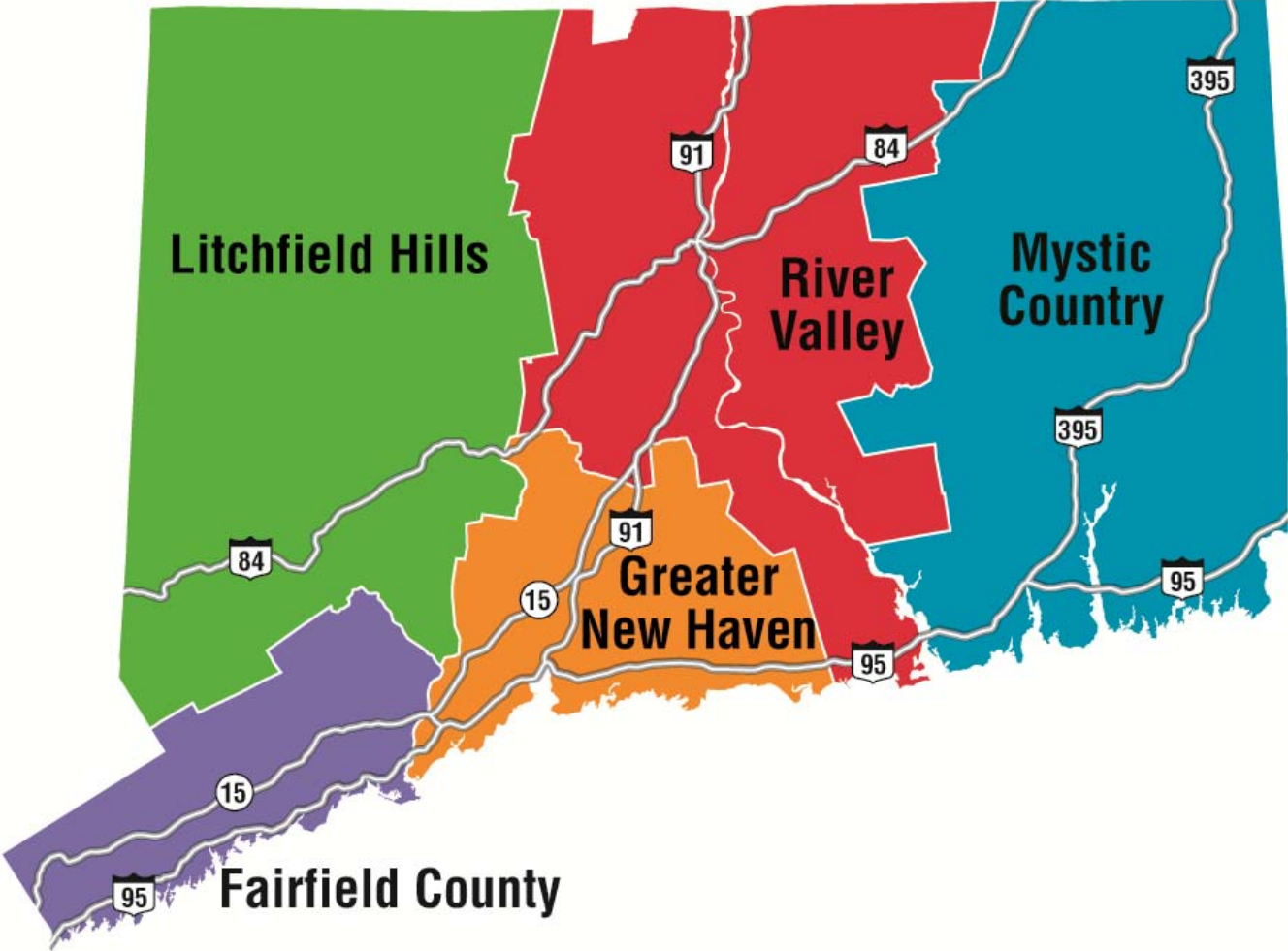
Regional Analysis



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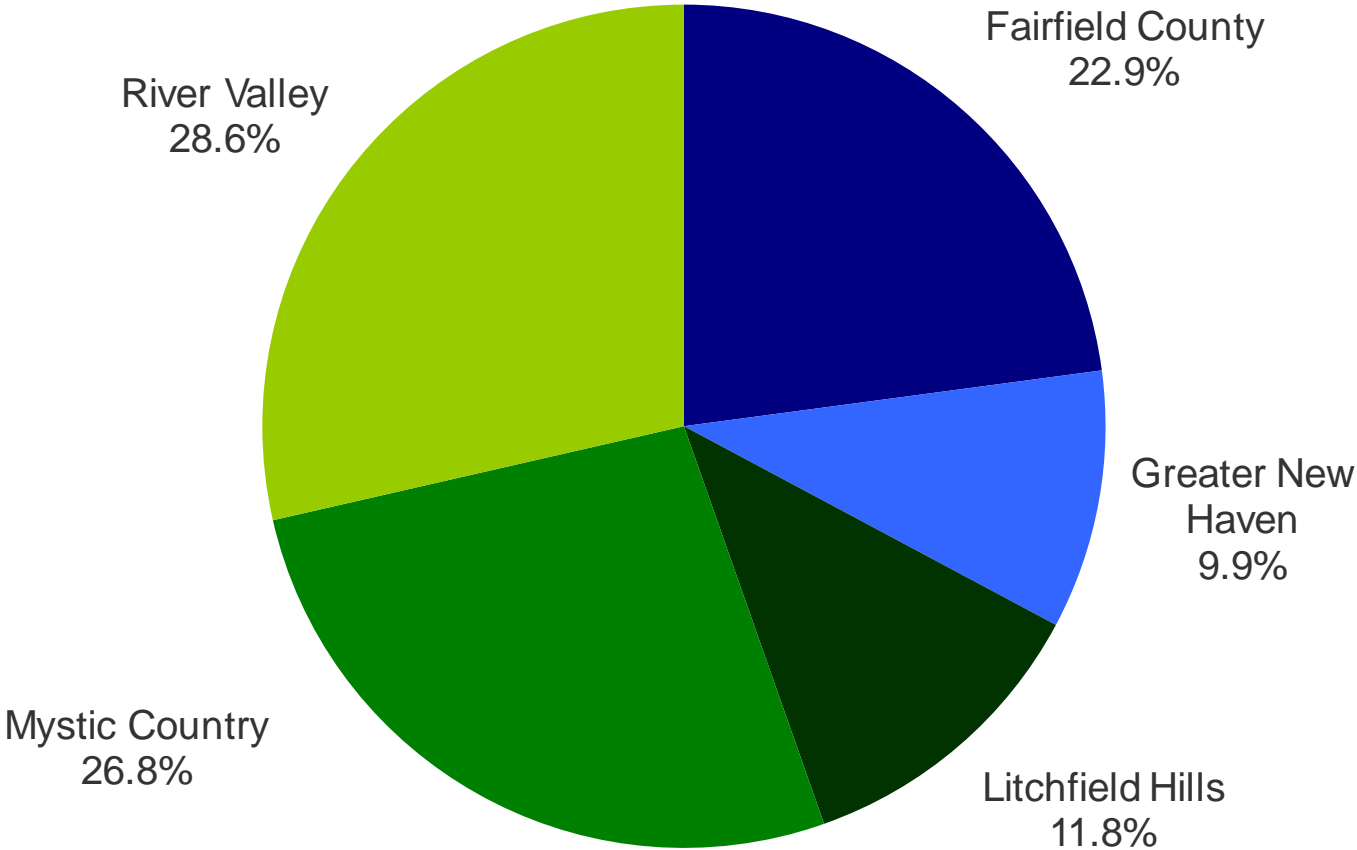
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Connecticut Tourism Regions



Connecticut Tourism Region Spending

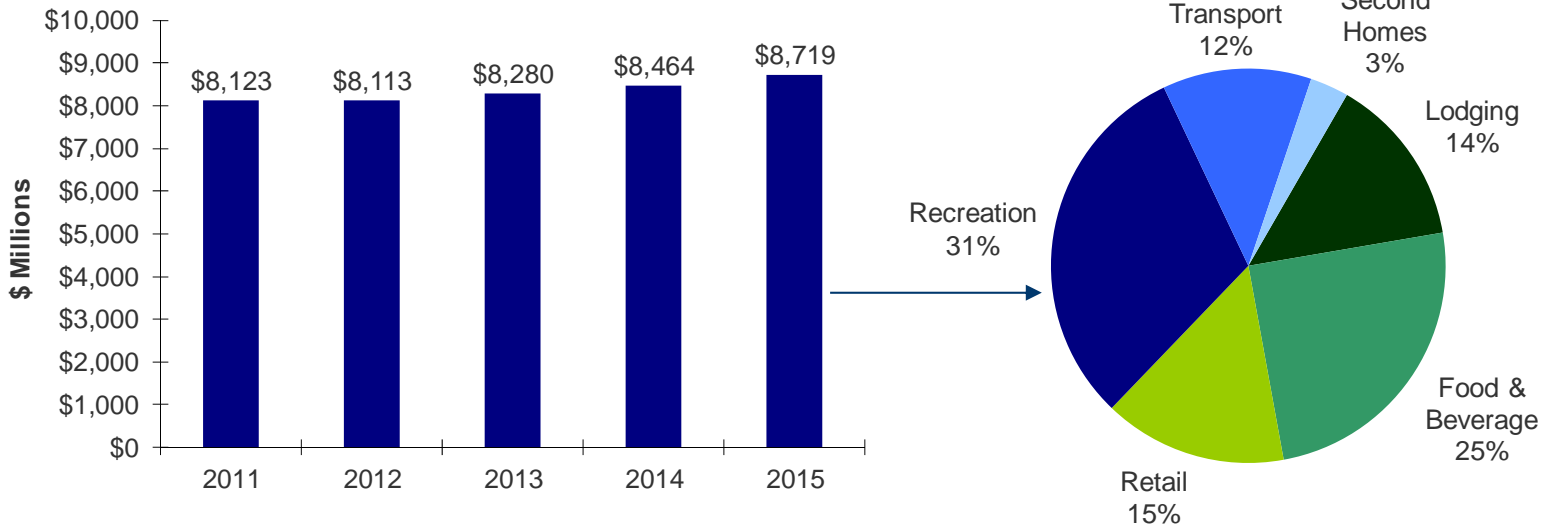
Connecticut Traveler Spending



Connecticut, Industry Sales

Connecticut								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$1,218.3	\$2,163.2	\$1,312.4	\$2,684.5	\$1,064.3	\$275.8	\$8,718.5	3.0%
2014	\$1,151.7	\$1,980.8	\$1,297.4	\$2,697.4	\$1,061.2	\$275.7	\$8,464.2	2.2%
2013	\$1,118.1	\$1,830.8	\$1,238.5	\$2,813.7	\$996.0	\$283.2	\$8,280.4	2.1%
2012	\$1,066.8	\$1,729.8	\$1,178.5	\$2,871.0	\$984.3	\$282.7	\$8,113.1	-0.1%
2011	\$1,046.7	\$1,677.1	\$1,172.7	\$2,963.7	\$994.9	\$267.8	\$8,122.9	

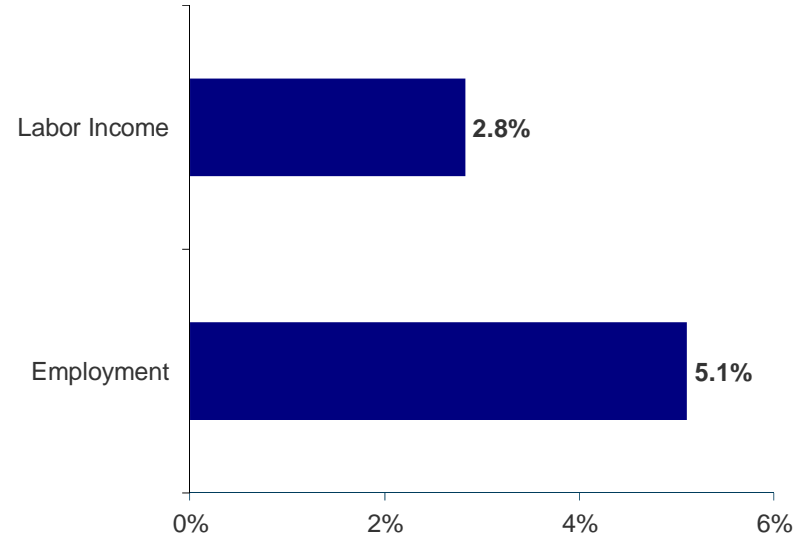
Tourism Industry Sales



Connecticut, Tourism Impact

Connecticut				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	82,688	121,527	100.00%	
2014	81,687	120,257	100.00%	
2013	80,645	118,586	100.00%	
2012	79,092	116,397	100.00%	
2011	77,579	114,355	100.00%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$2,978.7	\$5,226.1	100.00%	
2014	\$2,878.4	\$5,106.0	100.00%	
2013	\$2,855.4	\$5,022.1	100.00%	
2012	\$2,786.4	\$4,914.6	100.00%	
2011	\$2,626.0	\$4,645.9	100.00%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$778.4	\$1,103.4	\$117.17	\$1,881.7
2014	\$762.0	\$1,073.5	\$110.06	\$1,835.5
2013	\$748.1	\$1,052.0	\$104.58	\$1,800.1
2012	\$732.4	\$1,039.7	\$101.53	\$1,772.1
2011	\$706.5	\$1,020.4	\$90.54	\$1,726.9

Tourism Share of County Economy

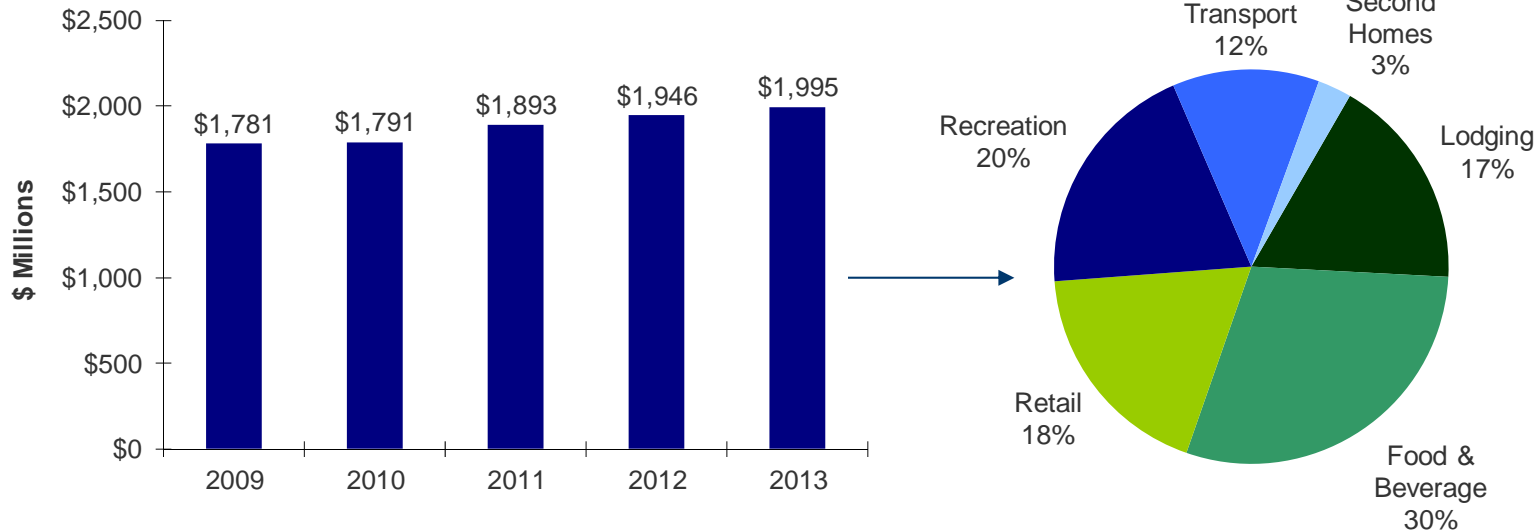


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$8,718.5	\$14,476.8
\$8,464.2	\$14,222.4
\$8,280.4	\$14,038.7
\$8,113.1	\$13,795.9
\$8,122.9	\$13,761.6

Fairfield County (Region), Industry Sales

Fairfield County (Region)								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$349.0	\$588.8	\$368.7	\$393.3	\$240.2	\$55.2	\$1,995.2	2.6%
2014	\$335.4	\$543.4	\$371.1	\$393.9	\$245.2	\$56.6	\$1,945.5	2.8%
2013	\$333.6	\$513.5	\$361.3	\$405.3	\$223.0	\$56.7	\$1,893.4	5.7%
2012	\$316.8	\$481.8	\$343.0	\$376.4	\$216.1	\$56.4	\$1,790.6	0.5%
2011	\$311.7	\$469.5	\$342.6	\$374.4	\$230.2	\$53.0	\$1,781.3	

Tourism Industry Sales



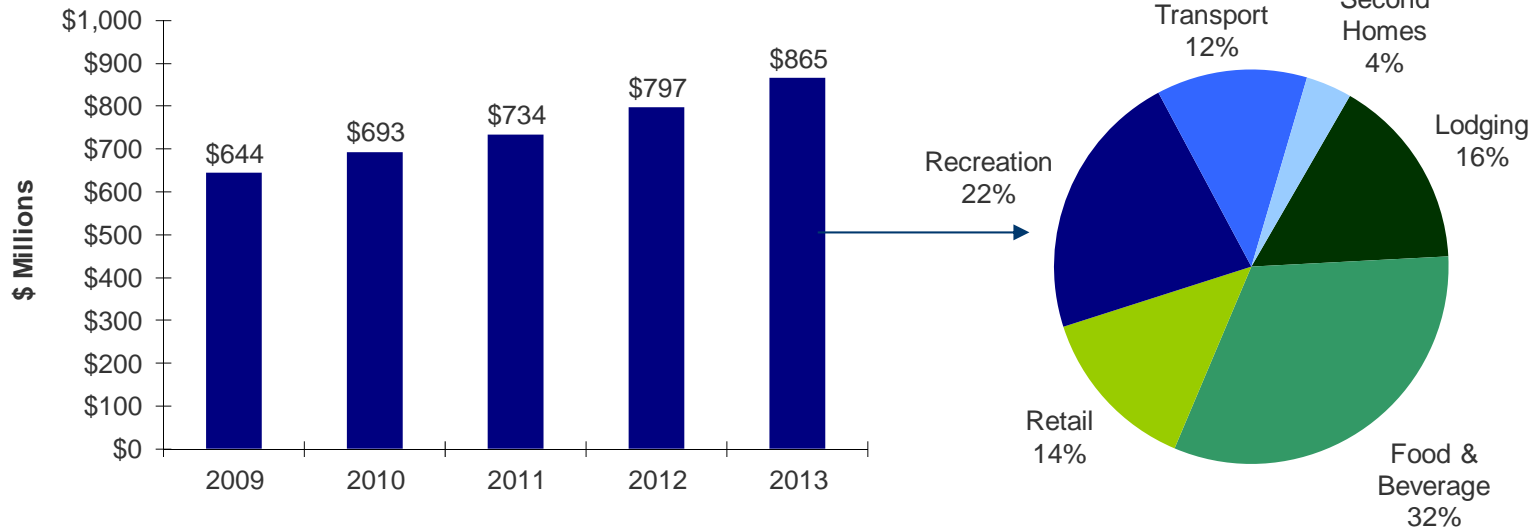
Fairfield County (Region), Tourism Impact

Fairfield County (Region)				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	16,680	25,491	20.98%	
2014	16,592	25,384	21.11%	
2013	15,919	24,394	20.57%	
2012	15,669	24,003	20.62%	
2011	15,146	23,289	20.37%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$586.6	\$1,154.9	22.10%	
2014	\$565.8	\$1,129.0	22.11%	
2013	\$544.7	\$1,083.2	21.57%	
2012	\$531.5	\$1,063.2	21.63%	
2011	\$508.1	\$1,019.2	21.94%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$185.4	\$236.6	\$28.87	\$422.0
2014	\$182.7	\$231.9	\$27.76	\$414.6
2013	\$177.7	\$227.4	\$25.61	\$405.1
2012	\$173.8	\$221.1	\$24.67	\$394.9
2011	\$170.2	\$218.3	\$21.29	\$388.5
Tourism Sales (millions)				
Tourism Industry		Tourism Economy		
\$1,995.2		\$3,526.4		
\$1,945.5		\$3,480.7		
\$1,893.4		\$3,459.3		
\$1,790.6		\$3,305.0		
\$1,781.3		\$3,289.4		

Greater New Haven region, Industry Sales

Greater New Haven								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$137.0	\$278.4	\$118.5	\$191.4	\$107.0	\$32.6	\$865.0	8.5%
2014	\$120.4	\$245.4	\$109.0	\$187.0	\$102.2	\$32.8	\$796.9	8.5%
2013	\$109.0	\$217.1	\$96.6	\$184.1	\$92.9	\$34.6	\$734.3	5.9%
2012	\$103.4	\$205.2	\$92.0	\$167.4	\$92.7	\$32.4	\$693.1	7.7%
2011	\$92.2	\$188.7	\$86.0	\$157.0	\$87.4	\$32.3	\$643.6	

Tourism Industry Sales



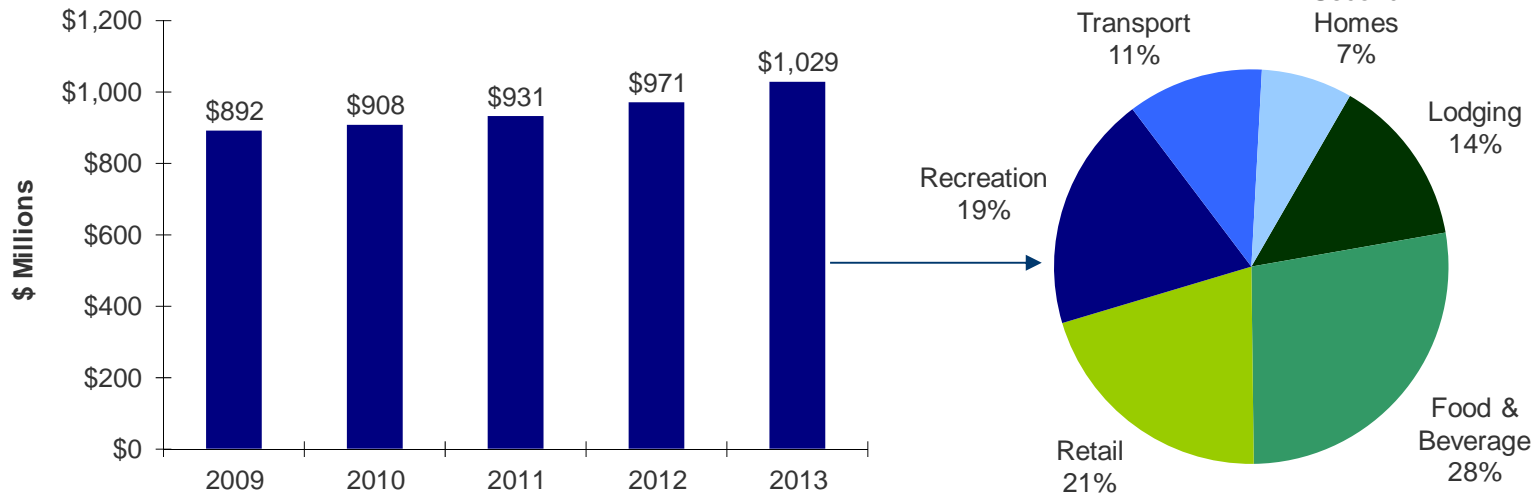
Greater New Haven region, Tourism Impact

Greater New Haven				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	10,511	15,870	13.06%	
2014	10,362	15,686	13.04%	
2013	10,060	15,226	12.84%	
2012	9,647	14,644	12.58%	
2011	9,289	14,136	12.36%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$265.4	\$481.2	9.21%	
2014	\$249.7	\$459.6	9.00%	
2013	\$248.4	\$453.1	9.02%	
2012	\$242.0	\$441.6	8.98%	
2011	\$224.8	\$411.2	8.85%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$77.9	\$103.5	\$15.49	\$181.3
2014	\$73.8	\$95.9	\$14.12	\$169.8
2013	\$71.2	\$90.6	\$13.72	\$161.8
2012	\$69.3	\$88.1	\$13.27	\$157.4
2011	\$64.8	\$81.9	\$11.80	\$146.7
Tourism Sales (millions)				
Tourism Industry		Tourism Economy		
\$865.0		\$1,534.3		
\$796.9		\$1,433.0		
\$734.3		\$1,332.4		
\$693.1		\$1,256.4		
\$643.6		\$1,159.3		

Litchfield Hills region, Industry Sales

Litchfield Hills								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$143.0	\$283.5	\$211.8	\$198.8	\$114.7	\$76.9	\$1,028.8	6.0%
2014	\$133.4	\$257.8	\$208.9	\$182.9	\$114.7	\$72.9	\$970.6	4.2%
2013	\$129.0	\$237.3	\$201.5	\$179.1	\$108.0	\$76.4	\$931.4	2.6%
2012	\$128.8	\$233.0	\$198.1	\$165.9	\$109.7	\$72.5	\$908.1	1.8%
2011	\$127.3	\$225.2	\$201.6	\$163.1	\$109.5	\$65.1	\$891.8	

Tourism Industry Sales



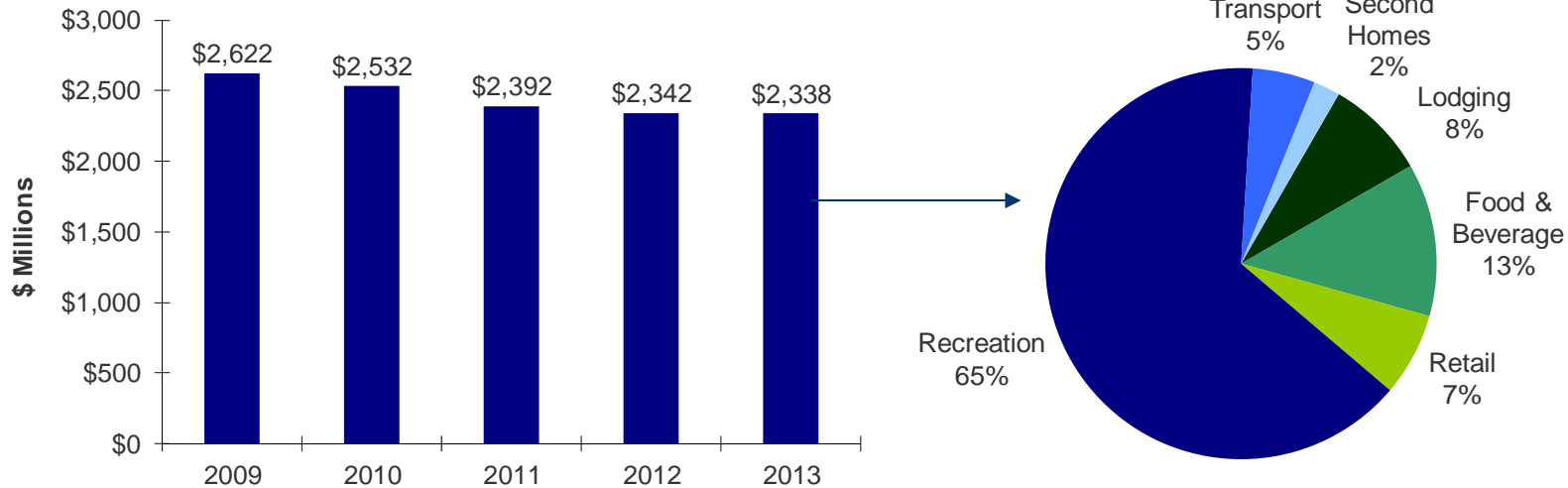
Litchfield Hills region, Tourism Impact

Litchfield Hills				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	9,623	14,349	11.81%	
2014	9,609	14,326	11.91%	
2013	9,497	14,143	11.93%	
2012	9,176	13,709	11.78%	
2011	8,756	13,157	11.51%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$282.7	\$513.5	9.83%	
2014	\$271.3	\$498.7	9.77%	
2013	\$269.8	\$491.8	9.79%	
2012	\$264.2	\$483.3	9.83%	
2011	\$243.4	\$448.5	9.65%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$85.8	\$112.7	\$12.26	\$198.4
2014	\$83.2	\$107.7	\$11.59	\$190.9
2013	\$81.5	\$104.7	\$10.99	\$186.2
2012	\$81.0	\$104.7	\$10.66	\$185.7
2011	\$77.8	\$103.2	\$9.58	\$181.0
Tourism Sales (millions)				
Tourism Industry		Tourism Economy		
\$1,028.8		\$1,614.4		
\$970.6		\$1,580.7		
\$931.4		\$1,518.7		
\$908.1		\$1,510.3		
\$891.8		\$1,484.6		

Mystic Country region, Industry Sales

Mystic Country								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$195.2	\$295.5	\$161.2	\$1,513.7	\$121.1	\$51.3	\$2,338.0	-0.2%
2014	\$185.6	\$271.8	\$160.5	\$1,549.5	\$120.1	\$54.1	\$2,341.7	-2.1%
2013	\$180.3	\$249.5	\$152.2	\$1,644.3	\$113.1	\$52.9	\$2,392.3	-5.5%
2012	\$178.4	\$245.3	\$149.3	\$1,786.5	\$114.5	\$58.0	\$2,532.0	-3.4%
2011	\$173.0	\$234.6	\$145.6	\$1,897.7	\$112.0	\$59.0	\$2,621.7	

Tourism Industry Sales



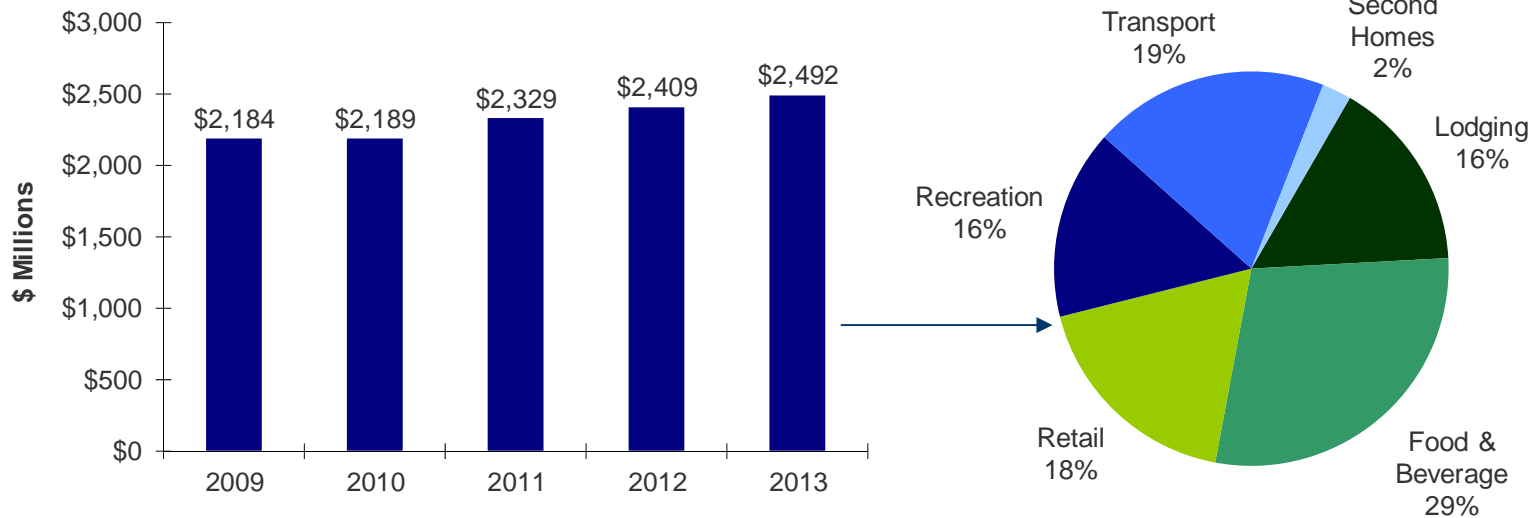
Mystic Country region, Tourism Impact

Mystic Country				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	20,506	28,065	23.09%	
2014	20,269	27,786	23.11%	
2013	20,134	27,572	23.25%	
2012	20,167	27,621	23.73%	
2011	20,602	28,229	24.69%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$1,124.9	\$1,744.9	33.39%	
2014	\$1,101.3	\$1,723.5	33.75%	
2013	\$1,098.2	\$1,706.5	33.98%	
2012	\$1,079.8	\$1,681.5	34.21%	
2011	\$1,016.6	\$1,587.6	34.17%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$206.9	\$348.7	\$19.13	\$555.6
2014	\$204.3	\$344.4	\$17.78	\$548.7
2013	\$201.9	\$341.7	\$17.19	\$543.6
2012	\$200.0	\$347.9	\$16.78	\$547.9
2011	\$190.4	\$341.3	\$15.54	\$531.6
Tourism Sales (millions)				
		Tourism Industry	Tourism Economy	
		\$2,338.0	\$3,560.5	
		\$2,341.7	\$3,592.9	
		\$2,392.3	\$3,695.8	
		\$2,532.0	\$3,911.9	
		\$2,621.7	\$4,035.4	

River Valley region, Industry Sales

River Valley								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$394.0	\$717.0	\$452.1	\$387.2	\$481.4	\$59.8	\$2,491.5	3.4%
2014	\$376.9	\$662.4	\$447.8	\$384.2	\$478.9	\$59.2	\$2,409.4	3.4%
2013	\$366.1	\$613.5	\$426.9	\$401.0	\$459.0	\$62.5	\$2,329.0	6.4%
2012	\$339.4	\$564.6	\$396.0	\$374.7	\$451.2	\$63.3	\$2,189.3	0.2%
2011	\$342.6	\$559.2	\$396.9	\$371.5	\$455.8	\$58.4	\$2,184.5	

Tourism Industry Sales



River Valley region, Tourism Impact

River Valley				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	25,368	37,765	31.08%	
2014	24,854	37,087	30.84%	
2013	25,034	37,252	31.41%	
2012	24,434	36,420	31.29%	
2011	23,785	35,546	31.08%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$719.0	\$1,331.6	25.48%	
2014	\$690.4	\$1,295.1	25.36%	
2013	\$694.3	\$1,287.6	25.64%	
2012	\$668.9	\$1,245.0	25.33%	
2011	\$633.1	\$1,179.5	25.39%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$222.4	\$301.9	\$41.41	\$524.3
2014	\$218.1	\$293.5	\$38.80	\$511.5
2013	\$215.7	\$287.7	\$37.07	\$503.4
2012	\$208.3	\$277.9	\$36.16	\$486.3
2011	\$203.4	\$275.7	\$32.33	\$479.0
Tourism Sales (millions)				
Tourism Industry		Tourism Economy		
\$2,491.5		\$4,239.9		
\$2,409.4		\$4,133.7		
\$2,329.0		\$4,032.5		
\$2,189.3		\$3,812.5		
\$2,184.5		\$3,793.4		

County Analysis

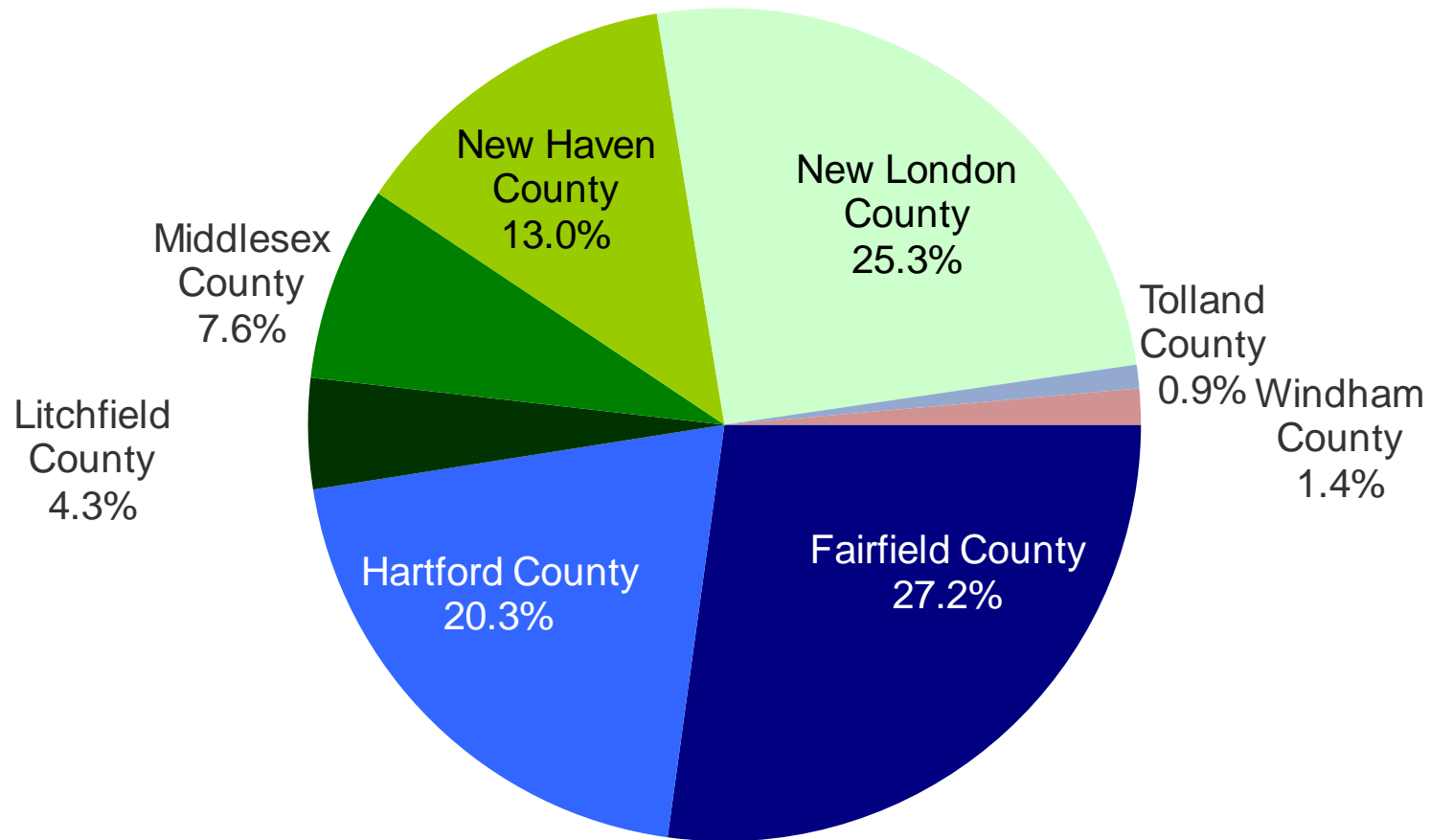


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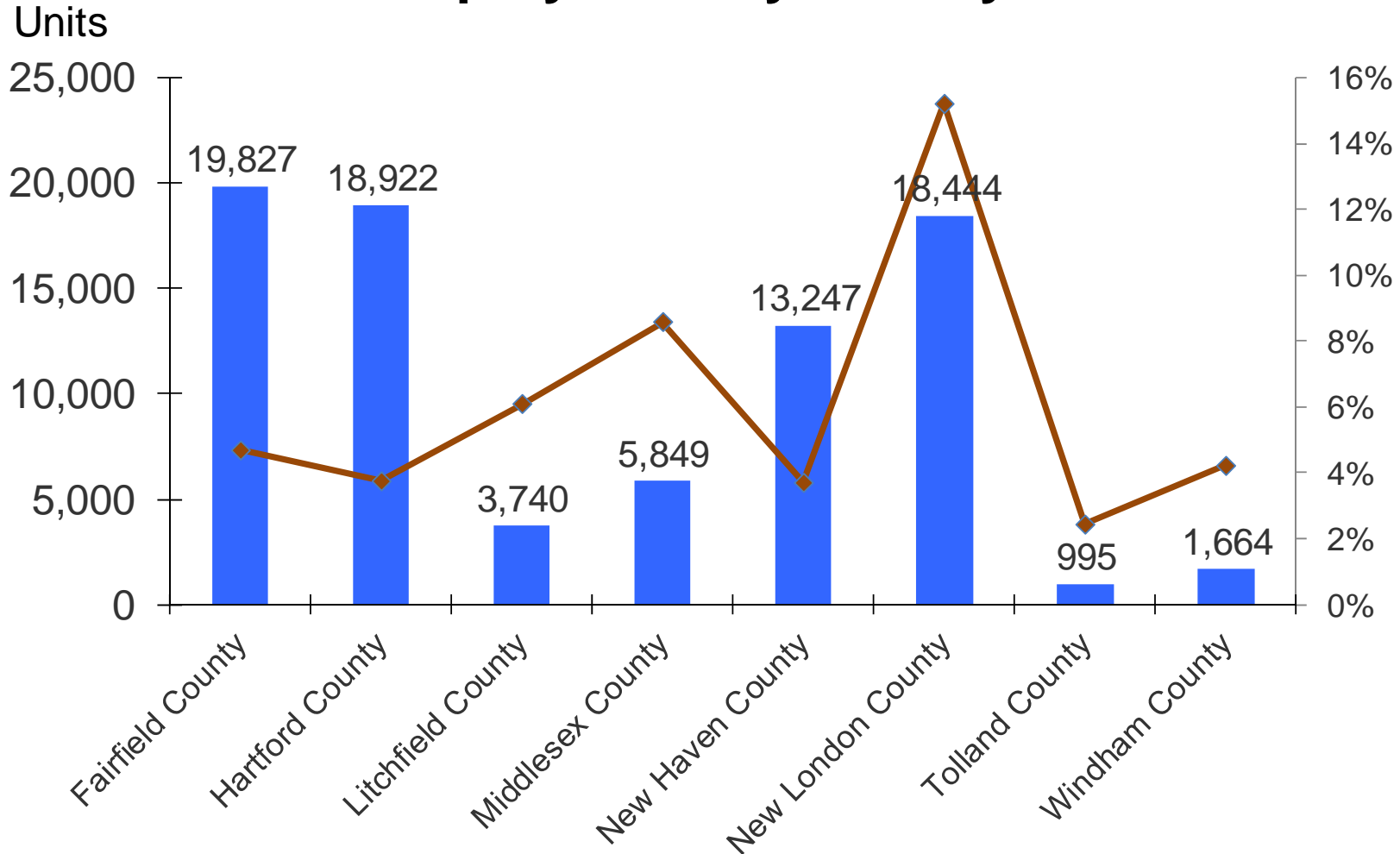
Connecticut Tourism County Spending

Connecticut Traveler Spending - Counties



Connecticut Tourism Employment by County

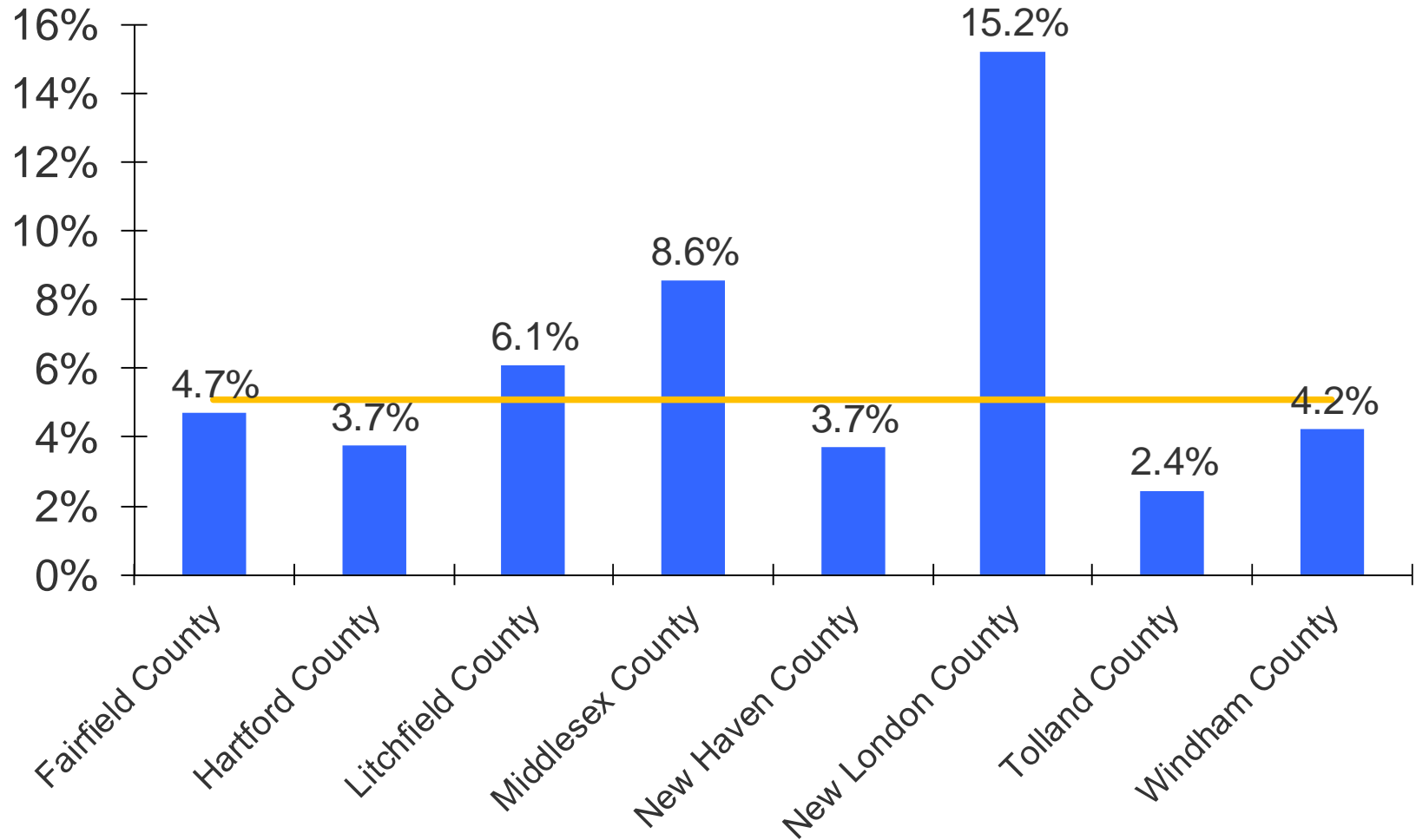
Connecticut Employment by County



Conn. Tourism Employment Concentration

Connecticut Employment Concentration

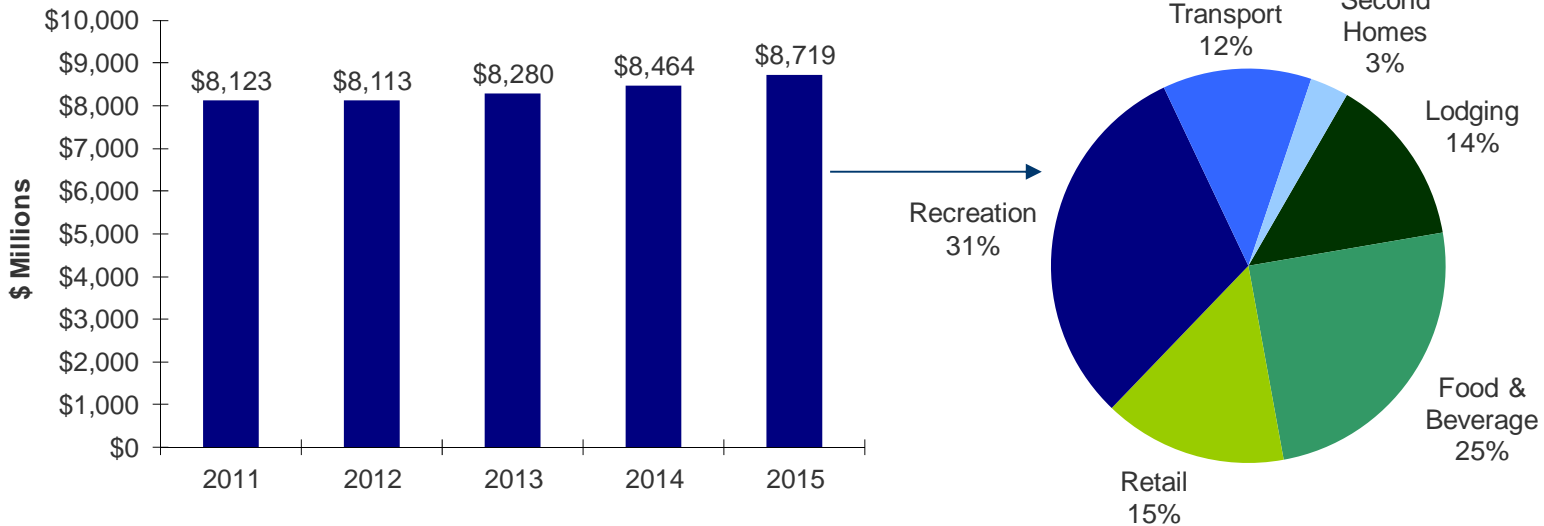
Share



Connecticut, Industry Sales

Connecticut								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$1,218.3	\$2,163.2	\$1,312.4	\$2,684.5	\$1,064.3	\$275.8	\$8,718.5	3.0%
2014	\$1,151.7	\$1,980.8	\$1,297.4	\$2,697.4	\$1,061.2	\$275.7	\$8,464.2	2.2%
2013	\$1,118.1	\$1,830.8	\$1,238.5	\$2,813.7	\$996.0	\$283.2	\$8,280.4	2.1%
2012	\$1,066.8	\$1,729.8	\$1,178.5	\$2,871.0	\$984.3	\$282.7	\$8,113.1	-0.1%
2011	\$1,046.7	\$1,677.1	\$1,172.7	\$2,963.7	\$994.9	\$267.8	\$8,122.9	

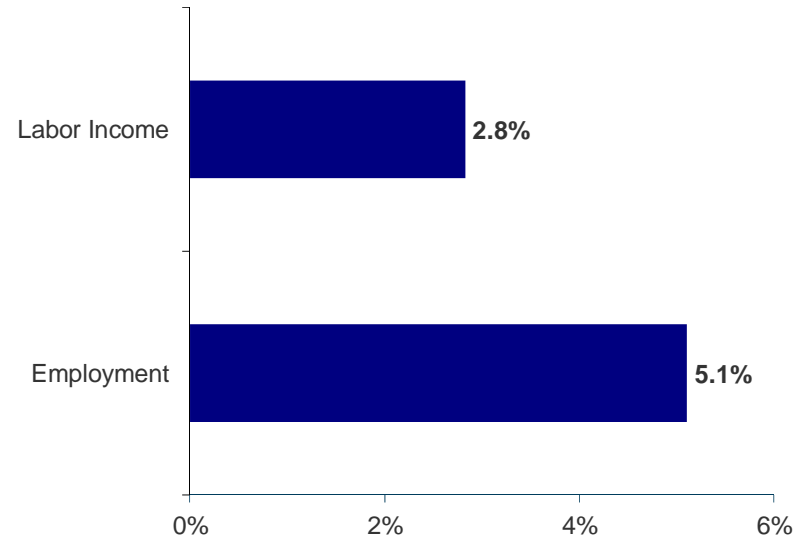
Tourism Industry Sales



Connecticut, Tourism Impact

Connecticut				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	82,688	121,527	100.00%	
2014	81,687	120,257	100.00%	
2013	80,645	118,586	100.00%	
2012	79,092	116,397	100.00%	
2011	77,579	114,355	100.00%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$2,978.7	\$5,226.1	100.00%	
2014	\$2,878.4	\$5,106.0	100.00%	
2013	\$2,855.4	\$5,022.1	100.00%	
2012	\$2,786.4	\$4,914.6	100.00%	
2011	\$2,626.0	\$4,645.9	100.00%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$778.4	\$1,103.4	\$117.17	\$1,881.7
2014	\$762.0	\$1,073.5	\$110.06	\$1,835.5
2013	\$748.1	\$1,052.0	\$104.58	\$1,800.1
2012	\$732.4	\$1,039.7	\$101.53	\$1,772.1
2011	\$706.5	\$1,020.4	\$90.54	\$1,726.9

Tourism Share of County Economy

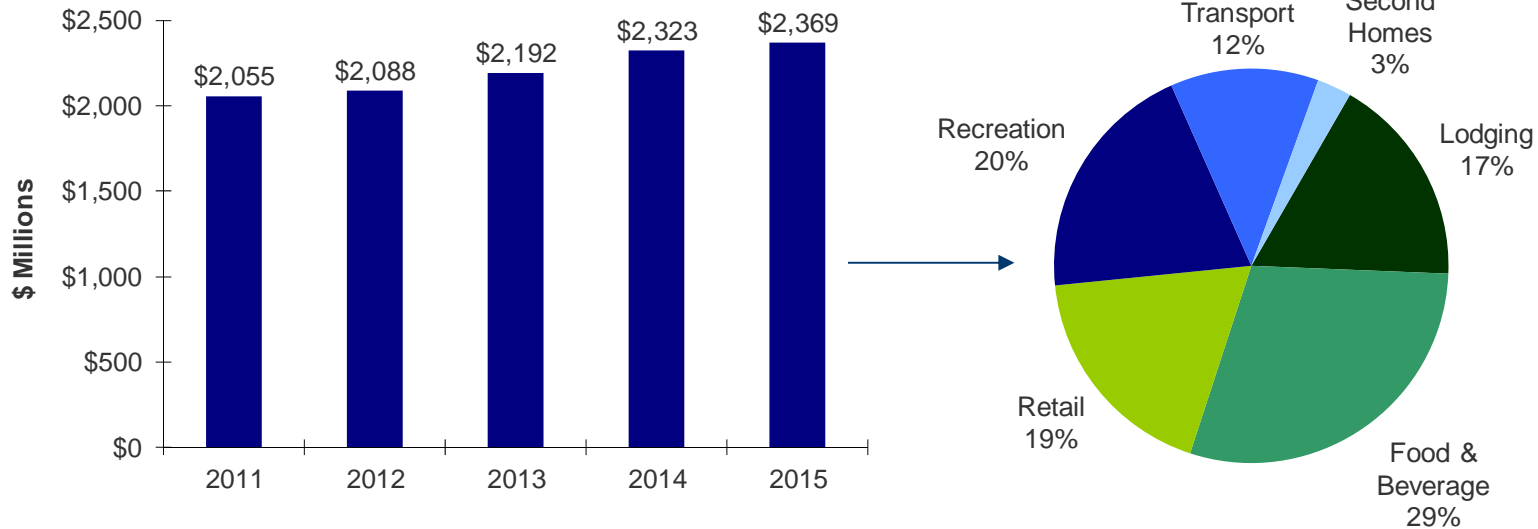


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$8,718.5	\$14,476.8
\$8,464.2	\$14,222.4
\$8,280.4	\$14,038.7
\$8,113.1	\$13,795.9
\$8,122.9	\$13,761.6

Fairfield County, Industry Sales

Fairfield County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$410.0	\$696.2	\$435.6	\$472.9	\$287.9	\$67.0	\$2,369.5	2.0%
2014	\$399.0	\$648.7	\$443.2	\$468.6	\$294.8	\$68.3	\$2,322.7	6.0%
2013	\$381.6	\$592.5	\$419.8	\$467.6	\$261.7	\$68.9	\$2,192.1	5.0%
2012	\$360.7	\$563.7	\$402.8	\$435.3	\$256.0	\$69.0	\$2,087.5	1.6%
2011	\$350.6	\$545.2	\$401.9	\$430.8	\$261.7	\$65.0	\$2,055.1	

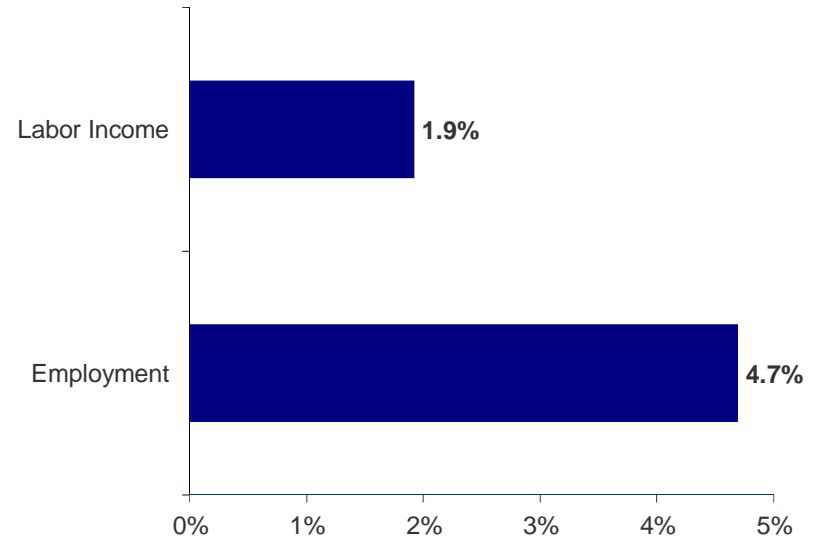
Tourism Industry Sales



Fairfield County, Tourism Impact

Fairfield County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	19,827	30,301	24.93%	
2014	19,699	30,138	25.06%	
2013	18,935	29,016	24.47%	
2012	18,650	28,569	24.54%	
2011	18,039	27,738	24.26%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$699.5	\$1,377.2	26.35%	
2014	\$673.7	\$1,344.3	26.33%	
2013	\$649.6	\$1,291.7	25.72%	
2012	\$634.7	\$1,269.8	25.84%	
2011	\$606.6	\$1,216.8	26.19%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$201.8	\$277.4	\$35.02	\$479.2
2014	\$198.7	\$273.0	\$33.52	\$471.7
2013	\$190.3	\$261.3	\$31.14	\$451.6
2012	\$186.8	\$250.3	\$30.17	\$437.2
2011	\$182.2	\$242.0	\$26.07	\$424.2

Tourism Share of County Economy

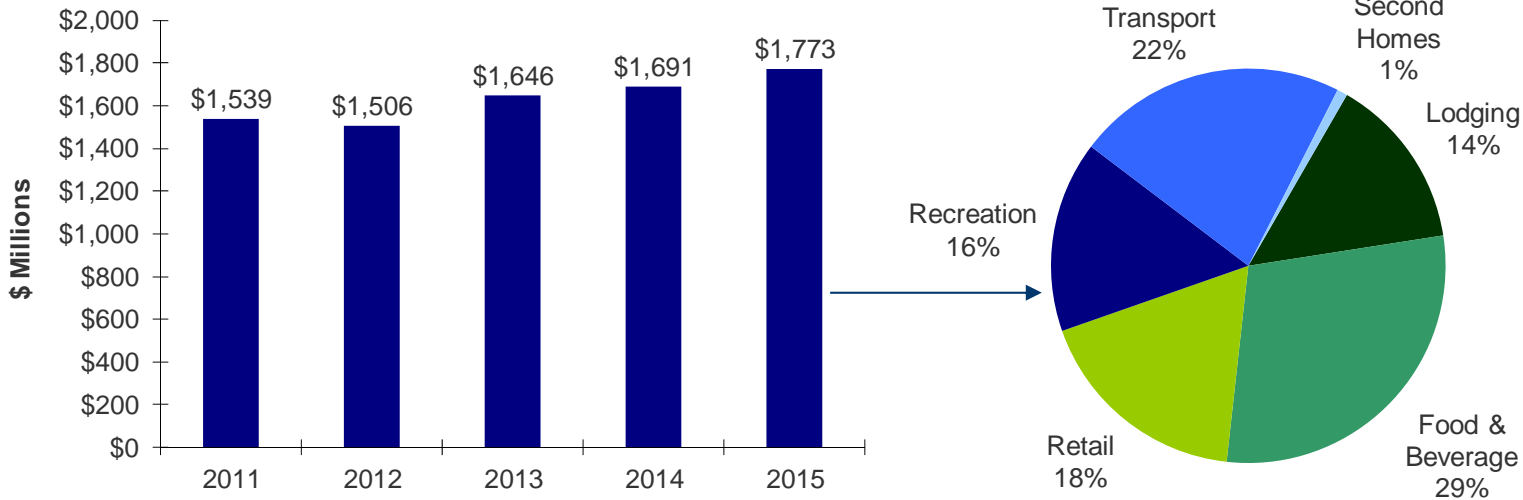


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$2,369.5	\$4,186.0
\$2,322.7	\$4,154.8
\$2,192.1	\$4,002.9
\$2,087.5	\$3,851.0
\$2,055.1	\$3,793.6

Hartford County, Industry Sales

Hartford County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$251.8	\$518.1	\$317.2	\$277.9	\$392.8	\$15.1	\$1,772.8	4.8%
2014	\$236.5	\$472.9	\$311.2	\$268.7	\$388.0	\$13.7	\$1,690.9	2.7%
2013	\$230.3	\$437.8	\$297.7	\$290.7	\$376.9	\$12.4	\$1,645.9	9.3%
2012	\$214.5	\$385.6	\$266.5	\$264.0	\$364.4	\$11.5	\$1,506.4	-2.1%
2011	\$223.2	\$389.9	\$275.9	\$265.5	\$371.8	\$12.6	\$1,538.9	

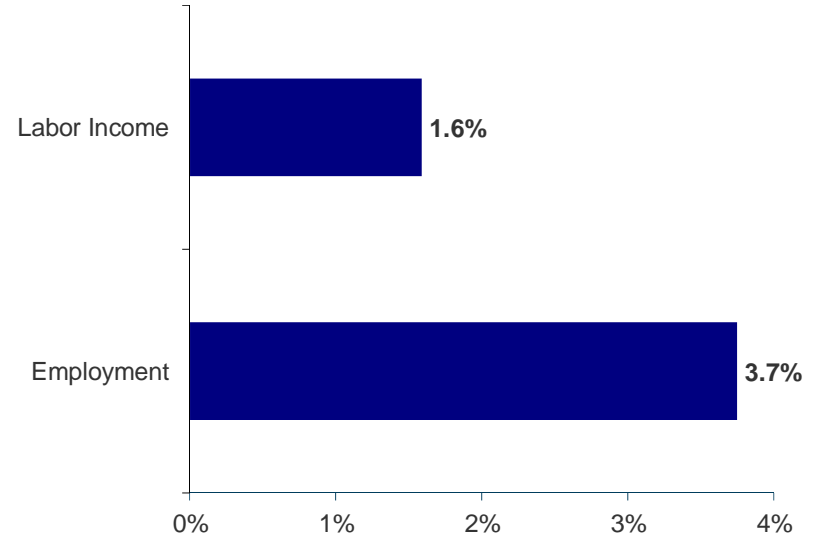
Tourism Industry Sales



Hartford County, Tourism Impact

Hartford County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	18,922	28,636	23.56%	
2014	18,458	28,019	23.30%	
2013	18,693	28,269	23.84%	
2012	18,228	27,623	23.73%	
2011	17,945	27,231	23.81%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$528.1	\$1,022.5	19.56%	
2014	\$507.5	\$996.0	19.51%	
2013	\$510.9	\$990.1	19.71%	
2012	\$491.8	\$957.5	19.48%	
2011	\$467.5	\$909.4	19.57%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$156.4	\$223.4	\$35.70	\$379.9
2014	\$152.6	\$215.3	\$33.61	\$367.8
2013	\$151.3	\$211.8	\$31.74	\$363.2
2012	\$145.1	\$196.7	\$30.57	\$341.8
2011	\$142.7	\$195.1	\$27.09	\$337.8

Tourism Share of County Economy

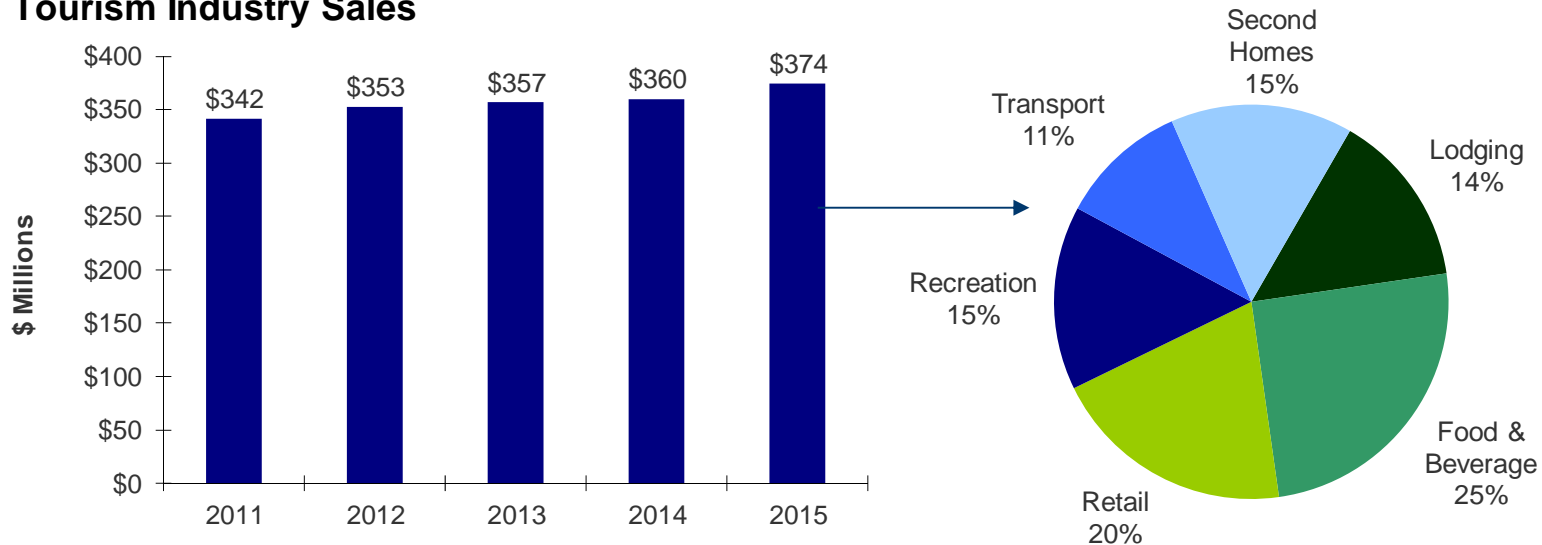


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$1,772.8	\$3,131.9
\$1,690.9	\$3,029.6
\$1,645.9	\$2,964.5
\$1,506.4	\$2,749.1
\$1,538.9	\$2,782.3

Litchfield County, Industry Sales

Litchfield County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$53.7	\$93.8	\$75.0	\$56.4	\$39.5	\$55.9	\$374.2	4.0%
2014	\$51.3	\$86.6	\$74.2	\$56.7	\$39.6	\$51.3	\$359.8	0.8%
2013	\$50.4	\$81.4	\$73.7	\$59.5	\$37.8	\$54.0	\$356.8	1.2%
2012	\$51.4	\$82.4	\$73.2	\$56.6	\$39.1	\$49.9	\$352.5	3.2%
2011	\$51.7	\$80.7	\$71.4	\$56.0	\$39.5	\$42.3	\$341.6	

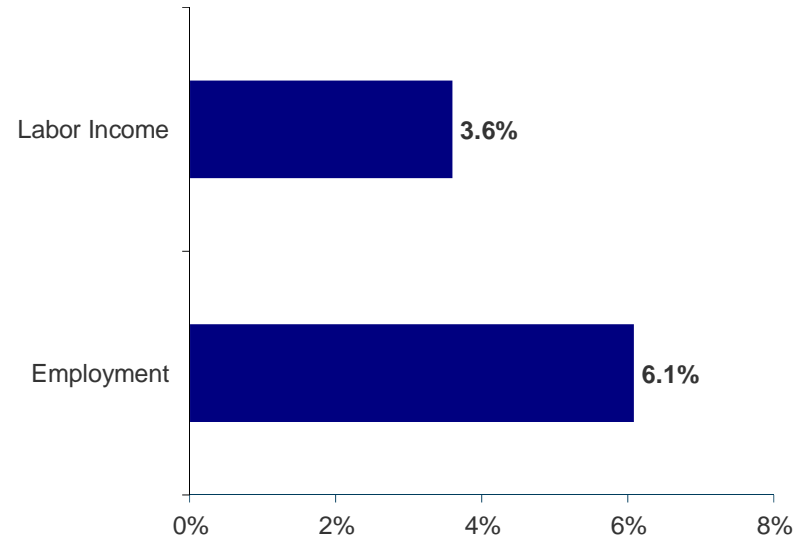
Tourism Industry Sales



Litchfield County, Tourism Impact

Litchfield County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	3,740	5,409	4.45%	
2014	3,837	5,538	4.61%	
2013	3,869	5,567	4.69%	
2012	3,643	5,269	4.53%	
2011	3,344	4,875	4.26%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$98.1	\$161.3	3.09%	
2014	\$95.5	\$158.5	3.10%	
2013	\$97.3	\$159.9	3.18%	
2012	\$94.8	\$156.0	3.17%	
2011	\$83.1	\$137.9	2.97%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$29.1	\$36.4	\$2.56	\$65.5
2014	\$28.7	\$35.5	\$2.35	\$64.2
2013	\$28.7	\$35.6	\$2.36	\$64.3
2012	\$28.4	\$35.1	\$2.33	\$63.5
2011	\$26.4	\$33.5	\$2.13	\$59.9

Tourism Share of County Economy

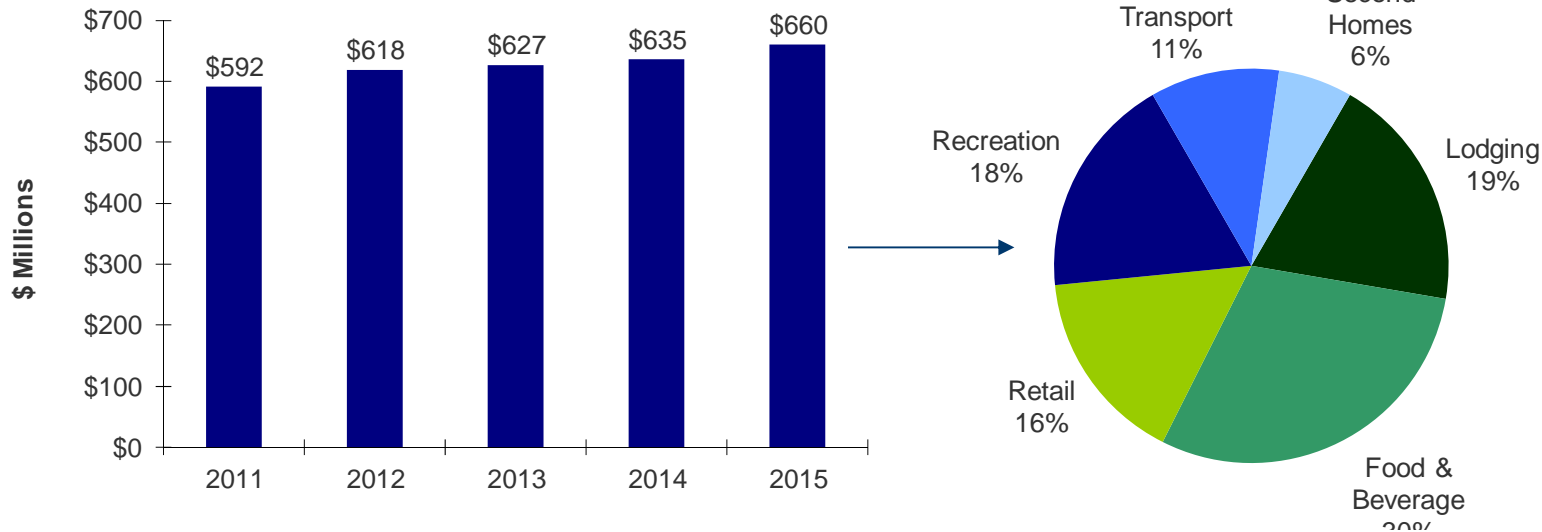


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$374.2	\$584.3
\$359.8	\$567.9
\$356.8	\$567.0
\$352.5	\$561.0
\$341.6	\$542.5

Middlesex County, Industry Sales

Middlesex County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$127.8	\$196.3	\$105.8	\$120.5	\$69.9	\$40.1	\$660.4	3.9%
2014	\$120.8	\$180.5	\$103.9	\$119.1	\$70.1	\$40.9	\$635.4	1.4%
2013	\$117.5	\$167.2	\$105.7	\$120.8	\$70.6	\$44.9	\$626.6	1.3%
2012	\$114.7	\$164.7	\$103.7	\$115.5	\$73.2	\$46.5	\$618.3	4.5%
2011	\$110.1	\$156.4	\$100.1	\$110.9	\$72.7	\$41.5	\$591.6	

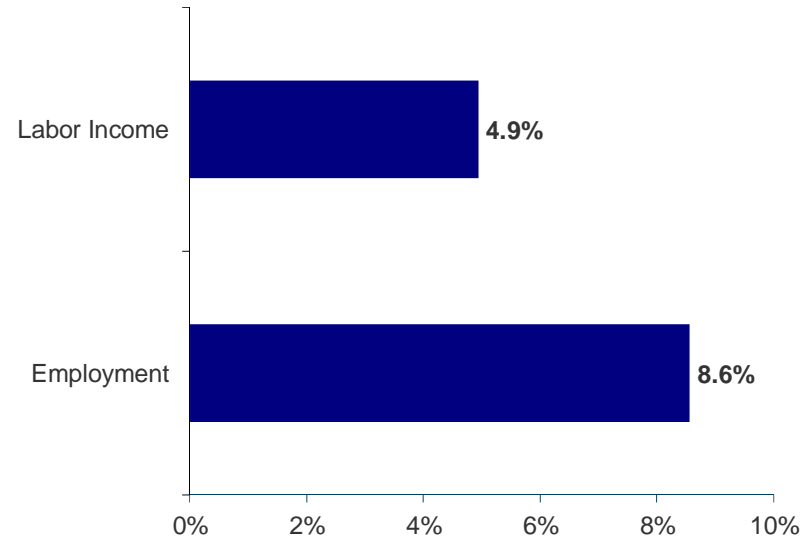
Tourism Industry Sales



Middlesex County, Tourism Impact

Middlesex County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	5,849	8,195	6.74%	
2014	5,807	8,144	6.77%	
2013	5,789	8,102	6.83%	
2012	5,649	7,910	6.80%	
2011	5,327	7,482	6.54%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$176.6	\$283.7	5.43%	
2014	\$169.5	\$274.9	5.38%	
2013	\$170.8	\$274.8	5.47%	
2012	\$164.2	\$264.4	5.38%	
2011	\$153.6	\$248.3	5.35%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$53.1	\$69.4	\$4.29	\$122.5
2014	\$51.8	\$67.1	\$4.04	\$118.9
2013	\$51.3	\$66.8	\$3.89	\$118.1
2012	\$50.3	\$65.7	\$3.79	\$116.0
2011	\$48.0	\$62.5	\$3.42	\$110.5

Tourism Share of County Economy

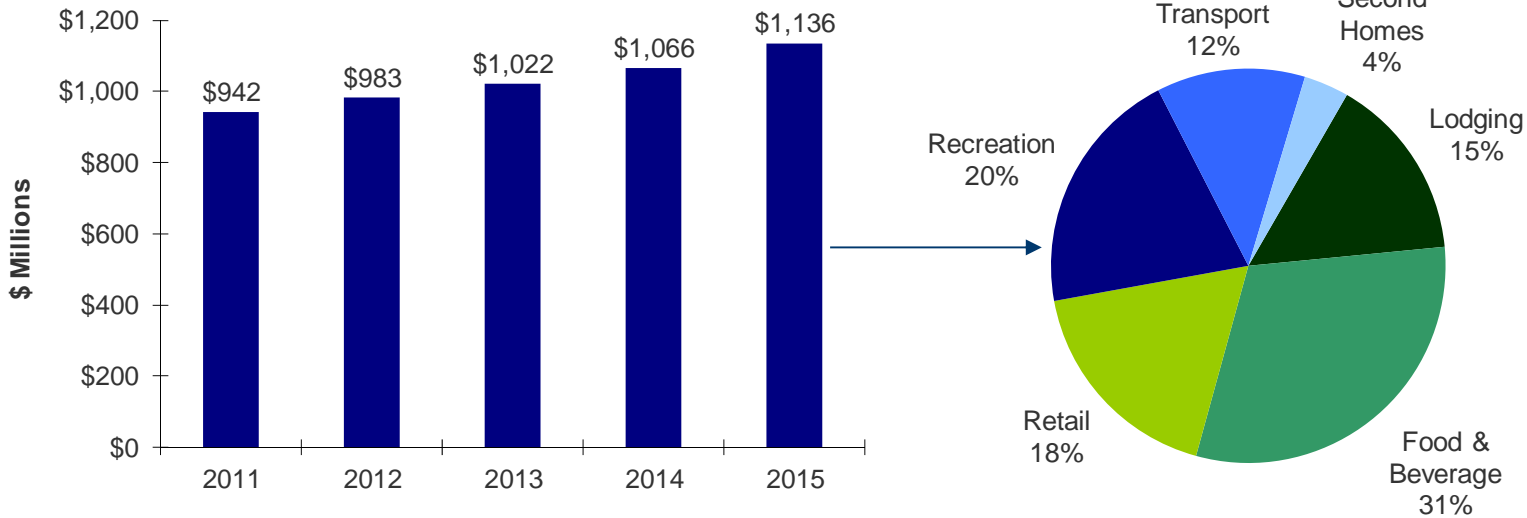


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$660.4	\$1,018.1
\$635.4	\$990.1
\$626.6	\$982.3
\$618.3	\$970.1
\$591.6	\$927.0

New Haven County, Industry Sales

New Haven County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$171.7	\$349.9	\$203.0	\$230.7	\$138.3	\$41.9	\$1,135.5	6.5%
2014	\$155.2	\$312.2	\$193.9	\$226.3	\$135.7	\$42.7	\$1,066.0	4.3%
2013	\$153.4	\$292.1	\$181.2	\$224.2	\$126.4	\$44.7	\$1,022.1	4.0%
2012	\$147.4	\$280.2	\$176.7	\$208.5	\$127.8	\$42.5	\$983.0	4.3%
2011	\$138.9	\$263.3	\$171.9	\$198.6	\$126.4	\$43.2	\$942.3	

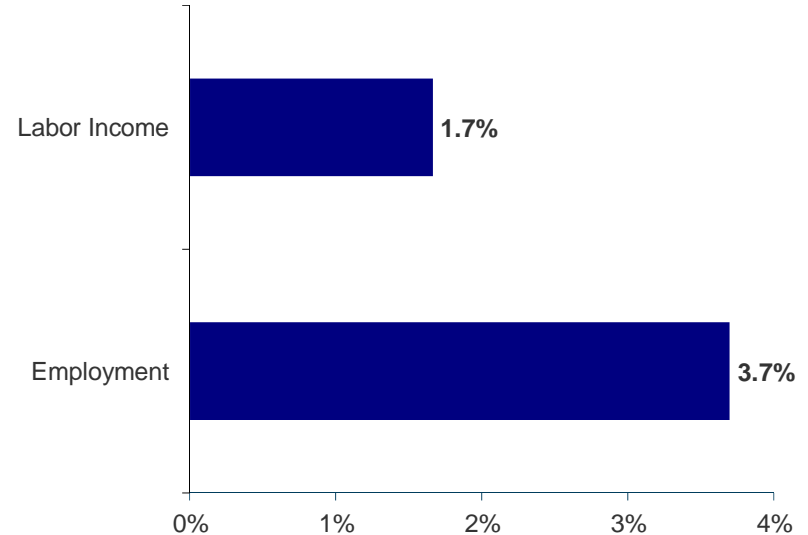
Tourism Industry Sales



New Haven County, Tourism Impact

New Haven County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	13,247	20,001	16.46%	
2014	13,028	19,720	16.40%	
2013	12,673	19,180	16.17%	
2012	12,199	18,518	15.91%	
2011	11,808	17,970	15.71%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$337.1	\$611.1	11.69%	
2014	\$317.6	\$584.5	11.45%	
2013	\$316.1	\$576.5	11.48%	
2012	\$308.2	\$562.4	11.44%	
2011	\$286.6	\$524.2	11.28%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$98.1	\$135.0	\$19.91	\$233.2
2014	\$94.7	\$127.2	\$18.36	\$221.9
2013	\$93.0	\$124.1	\$17.77	\$217.0
2012	\$91.0	\$119.8	\$17.38	\$210.8
2011	\$86.4	\$113.6	\$15.78	\$200.0

Tourism Share of County Economy

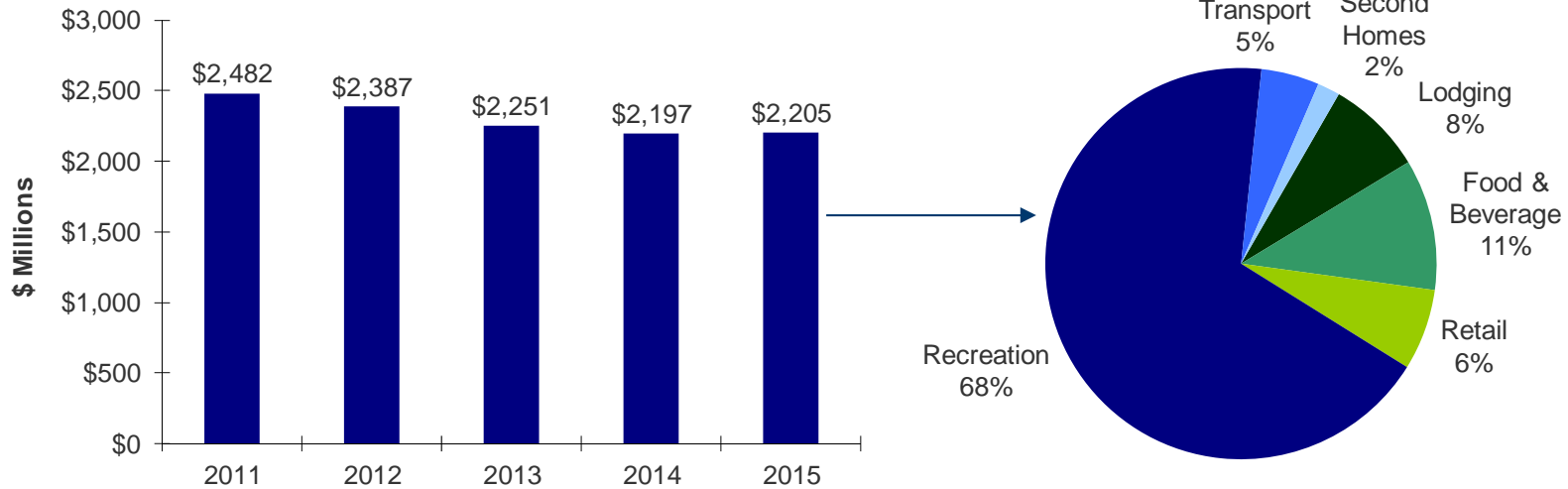


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$1,135.5	\$1,895.0
\$1,066.0	\$1,807.2
\$1,022.1	\$1,752.4
\$983.0	\$1,691.0
\$942.3	\$1,619.6

New London County, Industry Sales

New London County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$176.4	\$239.0	\$147.7	\$1,495.2	\$105.9	\$41.0	\$2,205.1	0.4%
2014	\$163.5	\$216.1	\$143.1	\$1,527.8	\$103.0	\$43.9	\$2,197.3	-2.4%
2013	\$160.0	\$201.1	\$133.6	\$1,620.1	\$94.6	\$41.9	\$2,251.2	-5.7%
2012	\$154.5	\$197.4	\$130.0	\$1,762.7	\$96.5	\$46.2	\$2,387.1	-3.8%
2011	\$149.8	\$188.2	\$126.6	\$1,874.8	\$94.9	\$47.6	\$2,481.8	

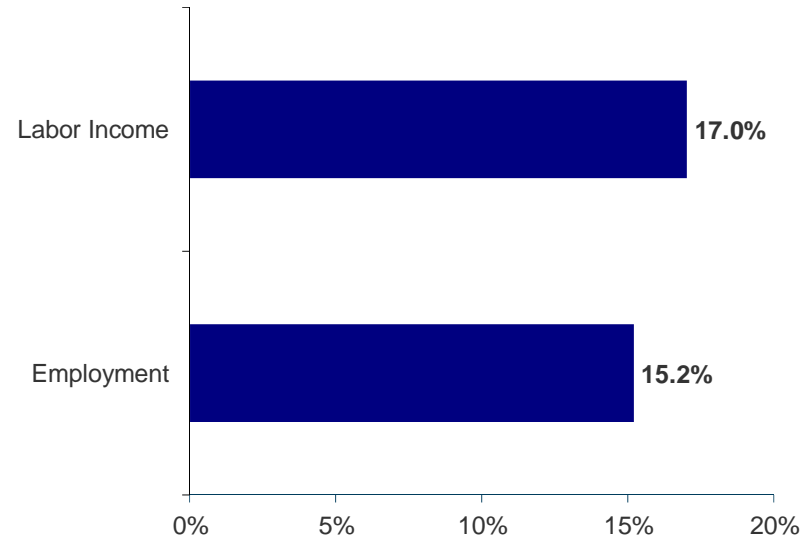
Tourism Industry Sales



New London County, Tourism Impact

New London County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	18,444	25,041	20.61%	
2014	18,253	24,819	20.64%	
2013	18,139	24,640	20.78%	
2012	18,200	24,728	21.24%	
2011	18,744	25,482	22.28%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$1,075.9	\$1,662.8	31.82%	
2014	\$1,054.7	\$1,644.5	32.21%	
2013	\$1,051.4	\$1,627.8	32.41%	
2012	\$1,033.0	\$1,602.8	32.61%	
2011	\$974.7	\$1,516.6	32.65%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$221.6	\$336.1	\$17.79	\$557.8
2014	\$219.4	\$332.7	\$16.50	\$552.1
2013	\$216.5	\$332.0	\$15.95	\$548.6
2012	\$214.0	\$341.5	\$15.63	\$555.4
2011	\$204.8	\$338.9	\$14.44	\$543.6

Tourism Share of County Economy

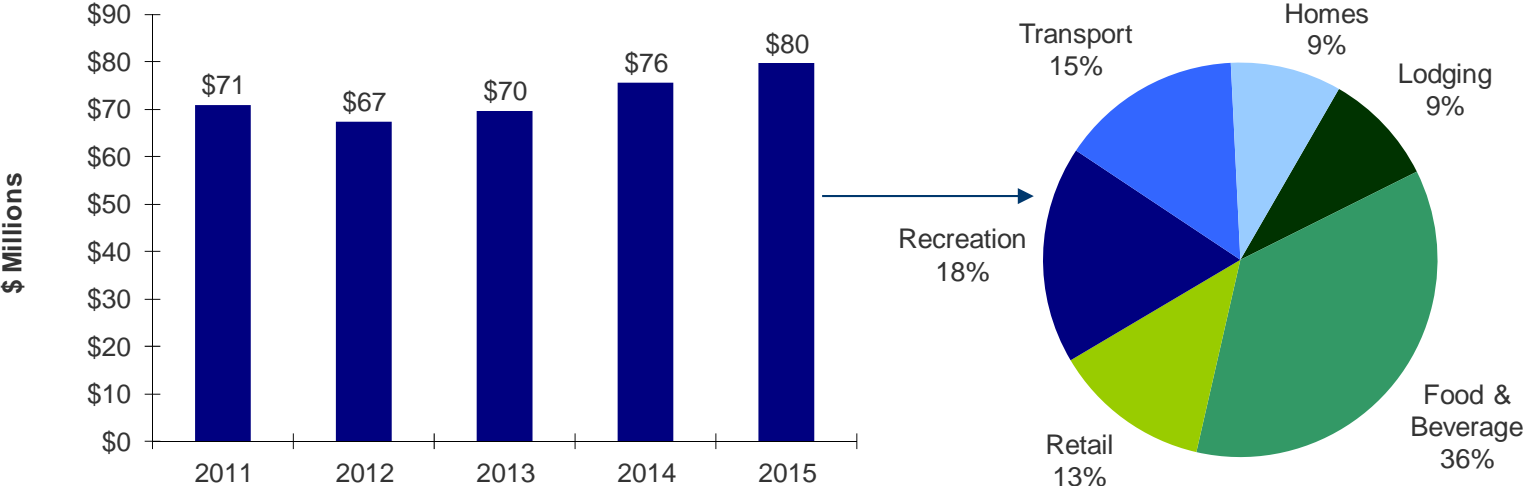


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$2,205.1	\$3,336.0
\$2,197.3	\$3,358.3
\$2,251.2	\$3,465.0
\$2,387.1	\$3,680.3
\$2,481.8	\$3,813.8

Tolland County, Industry Sales

Tolland County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$7.4	\$28.6	\$10.3	\$14.2	\$11.9	\$7.3	\$79.6	5.3%
2014	\$7.0	\$25.9	\$10.2	\$13.6	\$11.8	\$7.2	\$75.6	8.6%
2013	\$6.9	\$23.0	\$9.1	\$12.1	\$11.0	\$7.5	\$69.6	3.4%
2012	\$6.7	\$21.6	\$8.8	\$11.0	\$10.9	\$8.3	\$67.3	-5.0%
2011	\$7.7	\$21.8	\$9.6	\$11.7	\$11.6	\$8.5	\$70.9	

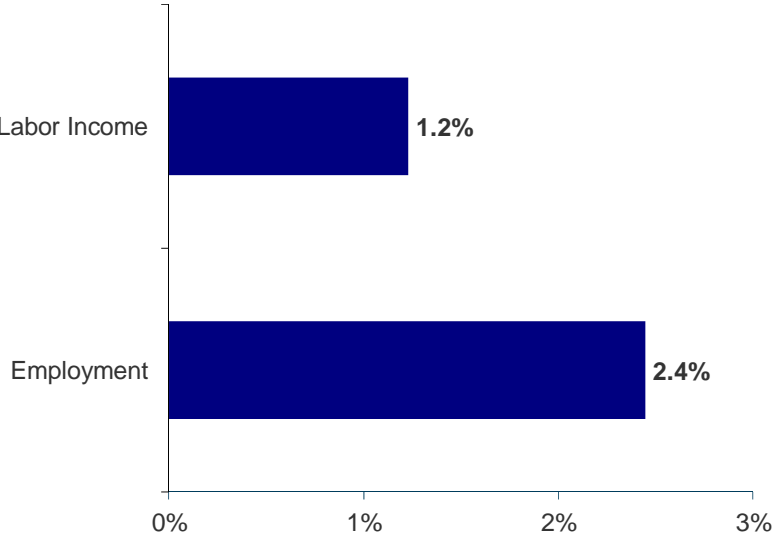
Tourism Industry Sales



Tolland County, Tourism Impact

Tolland County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	995	1,556	1.28%	
2014	982	1,540	1.28%	
2013	920	1,467	1.24%	
2012	928	1,479	1.27%	
2011	855	1,386	1.21%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$23.8	\$42.3	0.81%	
2014	\$22.4	\$40.3	0.79%	
2013	\$21.0	\$37.9	0.75%	
2012	\$21.6	\$38.7	0.79%	
2011	\$19.9	\$36.4	0.78%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$6.7	\$8.7	\$1.04	\$15.4
2014	\$6.4	\$8.1	\$0.86	\$14.6
2013	\$6.1	\$7.7	\$0.92	\$13.8
2012	\$6.1	\$7.5	\$0.93	\$13.6
2011	\$6.0	\$7.7	\$0.92	\$13.8

Tourism Share of County Economy

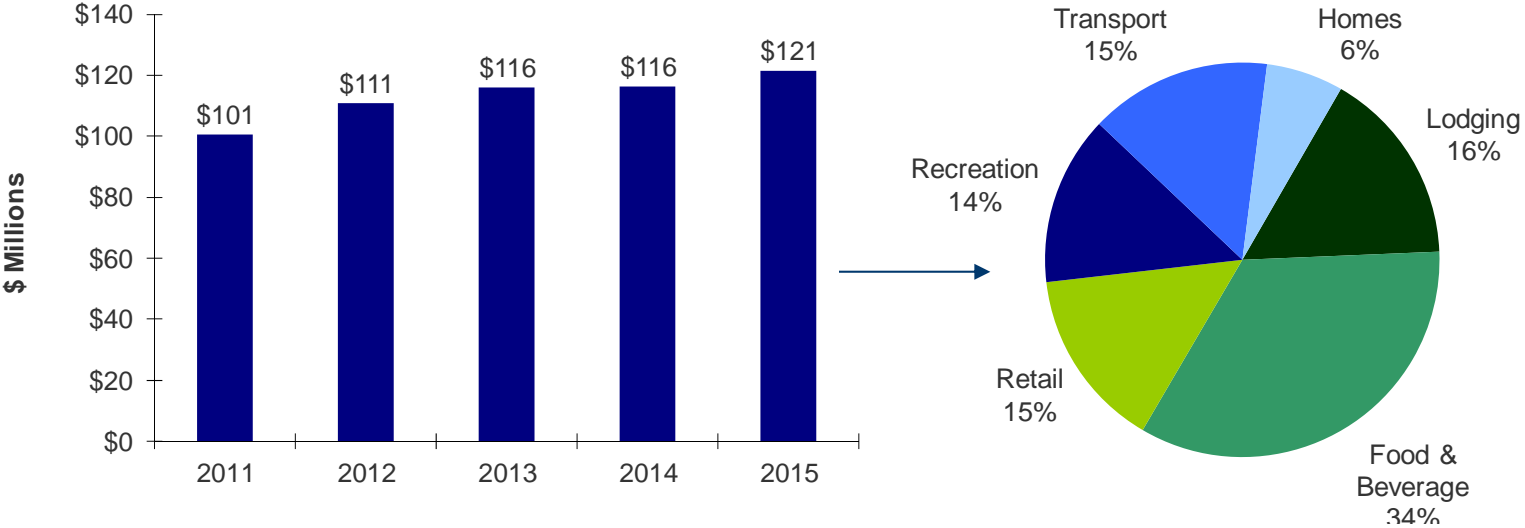


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$79.6	\$132.1
\$75.6	\$127.3
\$69.6	\$118.4
\$67.3	\$115.2
\$70.9	\$121.1

Windham County, Industry Sales

Windham County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$19.4	\$41.4	\$17.9	\$16.9	\$18.1	\$7.7	\$121.4	4.4%
2014	\$18.4	\$37.7	\$17.7	\$16.7	\$18.2	\$7.7	\$116.3	0.2%
2013	\$18.0	\$35.6	\$17.7	\$18.8	\$17.1	\$8.8	\$116.0	4.8%
2012	\$16.9	\$34.2	\$16.9	\$17.4	\$16.5	\$8.8	\$110.8	10.2%
2011	\$14.7	\$31.7	\$15.3	\$15.4	\$16.2	\$7.2	\$100.5	

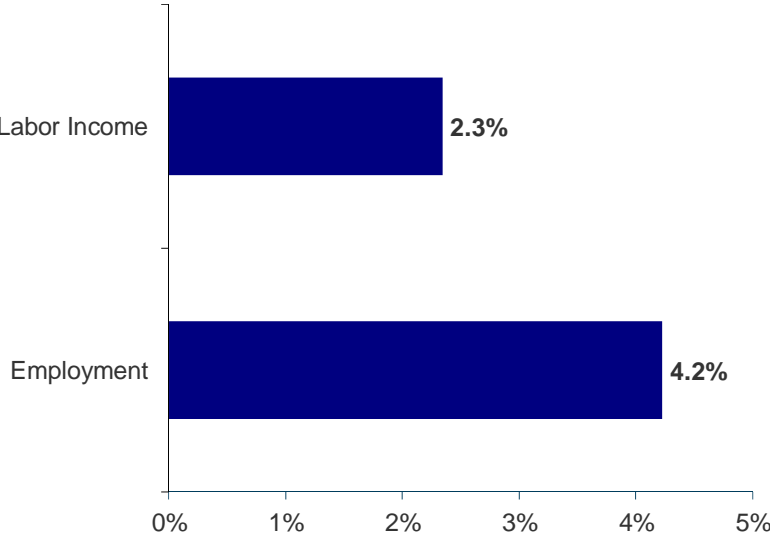
Tourism Industry Sales



Windham County, Tourism Impact

Windham County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	1,664	2,401	1.98%	
2014	1,624	2,351	1.95%	
2013	1,627	2,345	1.98%	
2012	1,596	2,301	1.98%	
2011	1,516	2,192	1.92%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$39.5	\$65.2	1.25%	
2014	\$37.7	\$62.9	1.23%	
2013	\$38.4	\$63.5	1.26%	
2012	\$38.2	\$63.2	1.29%	
2011	\$33.9	\$56.4	1.21%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$11.3	\$13.1	\$0.85	\$24.4
2014	\$10.9	\$12.6	\$0.82	\$23.6
2013	\$10.9	\$12.7	\$0.81	\$23.6
2012	\$10.8	\$12.2	\$0.74	\$23.0
2011	\$9.8	\$11.0	\$0.69	\$20.9

Tourism Share of County Economy



Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$121.4	\$192.0
\$116.3	\$186.0
\$116.0	\$186.3
\$110.8	\$178.4
\$100.5	\$162.1

Methodology and Background



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Definitions and terms

- A visitor includes all overnight and day travelers - traveling outside of their usual environment.
- The analysis measures the economic impact of travelers to the state of Connecticut, including:
 - Day trips and overnight travelers;
 - Domestic, Canadian, and overseas travelers;
 - Leisure and business travel.

Methods and data sources

- Domestic traveler expenditure estimates are provided by Longwoods International's representative survey of US travelers. These are broken out by sectors (lodging, transport at destination, food & beverage, retail, and recreation), by purpose (business and leisure), and by length of stay (day and overnight).
- Tourism Economics (TE) then adds and cross-checks several categories of spending:
 - Overseas traveler spending (source: OTTI, TE)
 - Canada traveler spending (source: Statistics Canada, TE)
 - Spending on air travel which accrues to CT airports and locally-based airlines
 - Gasoline purchases by travelers (source: TE calculation)
 - Recreational second home expenditures (source: US Census)
 - Smith Travel Research (lodging performance)
 - Local level lodging tax data
 - Sales tax by industry (CT Department of Revenue)
 - Industry-by-industry employment and personal income (Bureau of Economic Analysis and Bureau of Labor Statistics)

Definitions and terms

- An IMPLAN model was utilized for the state of Connecticut. This traces the flow of traveler-related expenditures through the local economy and their effects on employment, wages, and taxes. IMPLAN also quantifies the indirect (supplier) and induced (income) impacts of travel.
- Tourism Economics then cross-checks these findings with employment and wage data for each sector to ensure the findings are within reasonable ranges.
- The source of the employment and wage data is the Regional Economic Information System (REIS), Bureau of Economic Analysis, U.S. Department of Commerce. This is more comprehensive than Bureau of Labor Statistics (ES202/QCEW) data. The main definitional difference is that sole-proprietors, which do not require unemployment insurance, are not counted in the ES202 data.

Description of spending categories

Spend Category	Description
Lodging	Includes traveler spending in accommodation sector. This includes food and other services provided by hotels and similar establishments.
Recreation	Includes traveler spending within the arts, entertainment and recreation supersector.
Air transport	Includes the local economic activity generated by travelers within the air transport (airline) and support services (on airport) sectors.
Other transport	Includes all forms of local transport services such as taxis, limos, trains, rental cars, and buses.
Shopping	Includes traveler spending within all retail sectors within the Connecticut economy.
Service stations	Traveler spending on gasoline. Only the margin counts as local economic impact.
Second homes	Spending associated with the operation of seasonal second homes for recreational use as defined by the Census Department. This is based on an “imputed rent” calculation over an estimated peak season.
Food and beverage	Includes all traveler spending at restaurants and bars.

Cross section of our clients

Corporations

Hotel companies
Aviation manufacturing
Internet marketing
Internet distribution
Financial institutions
Theme Parks
Travel trade

Associations

Caribbean Tourism Org.
European Travel Commission
Pacific Asia Travel Assoc.
US Travel Association
DMAI
IAAPA
WTTC
UN World Tourism Org.

Destinations

Tourism Australia
Bahamas Ministry of Tourism
Brand USA
Visit California
Canadian Tourism Commission
Dubai Tourism
Georgia Tourism
Saudi Arabia (SCT)
Discover Los Angeles
NYC & Company
Ontario Ministry of Tourism
Visit Orlando
Philadelphia Tourism Marketing
San Diego CVB
Tourism Ireland
Visit Britain
Visit Denmark
Visit Florida
Visit Switzerland



About Tourism Economics

- Tourism Economics, headquartered in Philadelphia, is an Oxford Economics company dedicated to providing high value, robust, and relevant analyses of the tourism sector that reflects the dynamics of local and global economies. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, project feasibility analysis, tourism forecasting models, tourism policy analysis, and economic impact studies.
- Our staff have worked with over 200 destinations to quantify the economic value of tourism, forecast demand, guide strategy, or evaluate tourism policies.
- Oxford Economics is one of the world's leading providers of economic analysis, forecasts and consulting advice. Founded in 1981 as a joint venture with Oxford University's business college, Oxford Economics is founded on a reputation for high quality, quantitative analysis and evidence-based advice. For this, it draws on its own staff of 80 highly-experienced professional economists; a dedicated data analysis team; global modeling tools; close links with Oxford University, and a range of partner institutions in Europe, the US and in the United Nations Project Link.
- For more information: info@tourismeconomics.com.



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For more information:

Adam Sacks, President

adam@tourismeconomics.com

Christopher Pike, Director

cpike@tourismeconomics.com