THE IMPACT OF LODGING-BASED TOURISM ON THE CONNECTICUT ECONOMY:

A Dynamic Impact Analysis

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Executive Summary

The lodging-based travel and tourism industry in Connecticut generates a significant economic impact on the State and its regional economies. The Connecticut Tourism Council and the Connecticut Office of Tourism-Department of Economic and Community Development commissioned the Connecticut Center for Economic Analysis (CCEA) at the University of Connecticut to estimate that impact for calendar year 1999. Using tourism and travel expenditure data gathered by the Center for Survey Research at UConn from hotels, motels, resorts and campgrounds, CCEA estimates the impacts of the diverse tourism and travel industry on Connecticut and its regional economies.

These impacts must be regarded as conservative because the survey omitted surveying tourists and travelers directly or specific attractions such as museums, aquariums, amusement parks, monuments, casinos or the myriad Connecticut industries related to recreational fishing and boating. These omissions seriously understate the number of day-trippers and pass through travelers, especially in New London County. Notwithstanding this caveat, Connecticut's travel and tourism industry generated gross revenues in 1999 in excess of $4.9 billion or almost 4% of Connecticut's 1999 estimated gross state product. These revenues in turn translate into employment, taxes and procurement expenditures throughout the State.

Understanding these limitations, the size and rate of expansion of Connecticut's travel and tourism industry the study does reveal is all the more impressive.

Highlights

- ***Travel and tourism is one of the fastest growing industries in Connecticut.***
  - ✓ ***Lodging-based travel and tourism in Connecticut has averaged almost 8% growth annually over the past seven years.***
  - ✓ ***Faster than the national growth rate for this industry.***
- ***Connecticut's lodging-based travel and tourism industry had gross revenues in 1999 of almost $5 billion.***

- ***These revenues generated more than 89,000 jobs and $520 million total state and local tax revenues.***
- ***Every dollar spent by state and local government to support travel and tourism activity in Connecticut generated $10 in additional personal income for state residents.***

The tourism and travel industry is a diverse and complex collection of firm types that supply goods and services to travelers and tourists. Many firm types supply their goods and services to local residents as well. For this reason estimating the employment, output (gross sales) and income generated by tourism directly is difficult. For example, what fractions of a gas station's or restaurant's employment or gross sales do travelers and tourists generate compared to what local demand generates? Appendix A of this report details the many sectors of the economy that supply goods and services to tourists and travelers. A tourist or traveler is anyone who travels outside their normal commuting pattern to another town to shop, eat, drink, stay in a hotel, motel or campground, or visit a museum, amusement park, casino, or any other attraction such as monuments, gardens, special events or foliage. With this definition, many Connecticut residents are tourists and travelers in their own State. Their expenditures suggested above contribute to the State's gross travel and tourism sales and move money around inside Connecticut. To the extent that Connecticut keeps its residents' travel and tourism dollars inside the State, this industry has captured those dollars that might have been spent in a neighboring state or other country.

While tourism expenditures from residents are important, the benefits from out-of-state tourists are more significant. To the extent that Connecticut attracts tourists and travelers from other states and countries, the state is generating net new business for Connecticut as an export. Tables 1A and 1B below show gross sales by type of accommodation used and by county and tourism district for 1999.

Table 1-A
Travel and Tourism Expenditures
by County and Accommodation Used
(1999 $ million)
Connecticut
1999

County	Hotel/Motel /Resort	Campground	Friends or Relatives	Day Trips	Pass Through	Other	Total	Percent
Fairfield	610.03	0.00	402.56	160.44	226.32	40.26	1439.61	29.07
Hartford	429.26	0.00	416.35	112.89	159.25	28.33	1146.09	23.14
Litchfield	40.80	41.11	86.69	10.73	15.14	2.69	197.16	3.98
Middlesex	104.29	53.04	69.36	27.43	38.69	6.88	299.70	6.05
New Haven	297.50	6.25	389.54	78.24	110.37	19.64	901.53	18.20
New London	303.98	119.01	124.83	79.95	112.78	20.06	760.60	15.36
Tolland	25.28	15.87	56.55	6.65	9.38	1.67	115.40	2.33
Windham	6.14	34.08	47.73	1.61	2.28	0.41	92.24	1.86
State Total*	1817.27	269.36	1593.61	477.94	674.21	119.94	4952.33	100.00

*County totals may not sum to state total due to rounding

Table 1-B
Travel and Tourism Expenditures
by Tourism District and Accommodation Used
(1999 $ million)
Connecticut
1999

Tourism Districts	Hotel/Motel/ Resort	Campground	Friends or Relatives	Day Trips	Pass Through	Other	Total	Percent
Coastal Fairfield	454.11	0.00	299.67	119.43	168.47	29.97	1071.64	21.64
Waterbury region	70.54	7.09	97.00	18.55	26.17	4.66	224.02	4.52
Greater New Haven	197.73	3.21	229.66	52.00	73.36	13.05	569.00	11.49
Connecticut River Valley	175.96	54.55	163.20	46.28	65.28	11.61	516.88	10.44
Southeastern CT	295.92	115.86	121.52	77.83	109.79	19.53	740.45	14.95
Litchfield Hills	70.93	34.95	111.47	18.65	26.31	4.68	267.00	5.39
Central CT	66.06	0.00	64.08	17.37	24.51	4.36	176.38	3.56
Greater Hartford	276.20	9.06	286.19	72.64	102.47	18.23	764.79	15.44
Northeast CT	21.24	41.66	66.79	5.59	7.88	1.40	144.54	2.92
Housatonic Valley	111.56	0.60	74.50	29.34	41.39	7.36	264.76	5.35
North Central	77.12	2.38	79.61	20.28	28.61	5.09	213.10	4.30
Connecticut	1817.27	269.36	1593.61	477.94	674.21	119.94	4952.33	100.00

The tables below (Tables 3A and 3B from the full report) show the travel and tourism expenditures by major category and by county and tourism district for 1999.

Table 3-A
Travel and Tourism Expenditures
by Expenditure Category
by County
(1999 $ million)
Connecticut
1999

County	Lodging	Food/Restaurant	Recreation	Gasoline	Other Auto	Local Transportation	Retail and Other	Total
Fairfield	223.18	500.79	138.58	106.06	54.11	14.28	402.60	1439.61
Hartford	157.05	395.11	113.22	85.28	42.20	10.98	342.25	1146.09
Litchfield	18.79	67.23	26.02	14.71	7.73	1.37	61.30	197.16
Middlesex	43.14	104.57	36.27	21.83	12.19	2.45	79.25	299.70
New Haven	109.43	308.46	91.86	67.61	32.72	8.32	283.13	901.53
New London	122.40	267.35	88.20	55.00	31.16	6.59	189.90	760.60
Tolland	10.74	39.17	14.19	8.68	4.35	0.87	37.39	115.40
Windham	5.45	31.12	14.59	6.91	3.77	0.45	29.94	92.24
State Total	690.19	1713.81	522.94	366.09	188.25	45.30	1425.76	4952.33
Percent	13.94	34.61	10.56	7.39	3.80	0.91	28.79	100.00

Note: These numbers are estimates based on survey data instead of data from DRS, because DRS reports only lodging revenue, without campground revenue and non-taxed lodging revenue. So we use estimates to be consistent.

Table 3-B
Travel and Tourism Expenditures
by Expenditure Category
by Tourism District
(1999 $ million)
Connecticut
1999

Tourism Districts	Lodging	Food/Restaurant	Recreation	Gasoline	Other Auto	Local Transportation	Retail and Other	Total
Coastal Fairfield	166.14	372.79	103.16	78.95	40.28	10.63	299.69	1071.64
Waterbury region	26.48	76.62	23.65	16.79	8.21	2.00	70.27	224.02
Greater New Haven	72.64	195.29	57.38	42.53	20.79	5.32	175.04	569.00
Connecticut River Valley	69.50	178.87	58.40	38.12	20.07	4.45	147.46	516.88
Southeastern CT	119.16	260.27	85.86	53.54	30.34	6.41	184.87	740.45
Litchfield Hills	29.23	91.36	31.99	19.92	10.22	2.11	82.17	267.00
Central CT	24.17	60.81	17.42	13.12	6.50	1.69	52.67	176.38
Greater Hartford	101.90	263.31	77.15	56.96	28.22	7.19	230.06	764.79
Northeast CT	11.69	49.12	20.88	10.79	5.81	0.87	45.39	144.54
Housatonic Valley	40.87	92.08	25.59	19.51	9.96	2.62	74.13	264.76
North Central	28.44	73.37	21.47	15.87	7.86	2.01	64.08	213.10
Connecticut	690.19	1713.81	522.94	366.09	188.25	45.30	1425.76	4952.33

These ***estimated*** expenditures drive the analysis that the REMI model of Connecticut's economy provides. REMI, created and calibrated annually by Regional Economic Models, Inc. of Amherst, MA, is the gold standard of regional economic models and is used extensively by state and regional planning and development agencies in the U.S. We measure the economic impact primarily in terms of increased gross state product (GSP), and its county equivalent, gross regional product (GRP), increased aggregate personal income, and new employment (jobs) due to the travel and tourism industry in Connecticut, its counties and tourism districts. These impacts are ***total*** impacts, including the direct (travel and tourism industry exclusively), indirect (business to business procurement of goods and services), and induced (expenditures by direct and indirect employment) effects at the three levels of geography. In addition, we estimate the fiscal impacts in terms of increased total state tax revenue and total local tax revenue. We also estimate the impact on government spending, because it typically increases as increased economic activity attracts population to the region, requiring more public services. The table below (Table 4 from the report) provides a summary of the 1999 economic and fiscal

Table 4: Summary Table for Tourism Sector Economic Impact

Variable	Fairfield	Hartford	Litchfield	New Haven	Middlesex	New London	Tolland	Windham	Connecticut
Employment (Units)	20480	22960	3818	17480	5638	13690	2956	2445	89470
Gross State Product ($1999 Mil)	1054.80	1106.33	154.77	789.65	222.32	559.18	121.82	98.03	4108.46
Personal Income ($1999 Mil)	1086.72	920.99	150.39	791.44	218.80	466.31	145.59	105.00	3874.34
Disposable Income ($ 1999 Mil)	887.79	742.07	122.13	636.62	177.78	378.85	118.75	84.42	3140.57
Population (Units)	25540	26580	6621	26020	7953	19010	5647	4603	122000
Total New State Tax Revenue ($1999 Mil)	97.66	84.03	12.30	63.80	19.04	47.82	9.34	6.34	340.37
Total New Local Tax Revenue ($1999 Mil)	38.19	75.02	9.82	38.52	11.74	28.53	8.29	7.70	181.03
Induced Govt Spending ($1999 Mil)	85.49	134.68	19.63	92.60	32.78	77.16	39.08	19.72	502.45
Benefit-Cost Ratio(PV of Pers Inc / PV of Incent & Induc Govt Spend)	15.47	8.79	13.40	9.47	11.54	8.33	5.37	8.00	10.08

impacts by county.

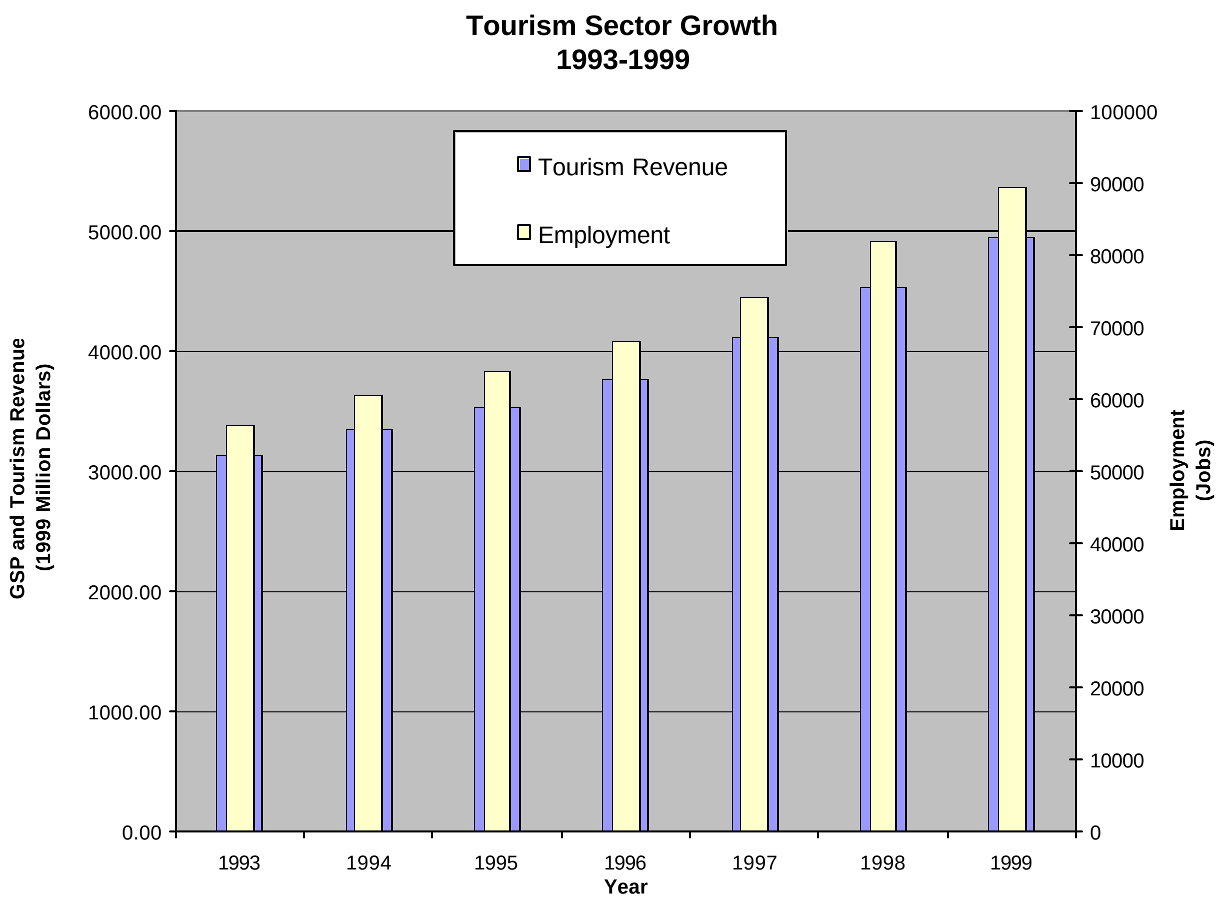
The table below (Table 5 from the report) shows these same 1999 impacts by tourism district.

Table 5: Summary Table for Tourism Sector Economic Impact By Tourism Districts								
Tourism Districts	Total Employment (Units)	Gross Regional Product($ Mil)	Personal Income ($ Mil)	Disposable Income ($ Mil)	Population (Units)	Total New State Tax Revenue ($ Mil)	Total New Local Tax Revenue ($ Mil)	Induced Govt Spending ($ Mil)
Coastal Fairfield	15237	784.77	808.52	660.52	19002	72.66	28.42	63.61
Waterbury region	4343	193.72	193.50	155.81	6595	15.62	9.77	22.92
Greater New Haven	10484	483.17	486.44	392.29	15241	39.95	22.59	53.84
Connecticut River Valley	9884	414.13	411.04	332.41	14273	34.53	21.10	55.27
Southeastern CT	13327	544.36	453.95	368.81	18506	46.55	27.78	75.11
Litchfield Hills	5221	225.42	209.62	169.68	8068	17.69	14.29	28.01
Central CT	3534	170.26	141.74	114.20	4091	12.93	11.55	20.73
Greater Hartford	15669	743.22	643.93	519.66	19410	56.50	50.42	104.32
Northeast CT	3631	146.78	157.92	127.55	6680	10.21	10.76	32.65
Housatonic Valley	3781	194.14	199.88	163.28	4743	17.95	7.09	15.84
North Central	4366	207.27	179.19	144.59	5389	15.76	14.06	28.88
Connecticut	89470	4108.46	3874.34	3140.57	122000	340.37	181.03	502.45

The growth of Connecticut's lodging-based travel and tourism has been impressive. The table below shows the growth in lodging revenue reported by DRS and the resulting impacts statewide from 1993 through 1999. ***The lodging-based travel and tourism industry in Connecticut has averaged almost 8% growth annually over the past seven years. This is slightly larger than the national growth rate for this industry (TIA reports).***

Years	Lodging Revenue from DRS(Nominal Million Dollars)	Lodging Revenue from DRS(1999 Million Dollars)	Real Revenue Growth Rate(Percentage)	Tourism Total Revenue(1999 Million Dollars)	Gross State Product Impact(1999 Million Dollars)	Total Employment Impact (Jobs)
1993	308.30	343.00		3124.28	2591.91	56444
1994	338.23	367.16	7.04	3344.31	2774.44	60419
1995	365.83	387.71	5.60	3531.52	2929.75	63801
1996	396.50	412.64	6.43	3758.58	3118.12	67903
1997	441.40	450.88	9.27	4106.91	3407.10	74196
1998	489.55	498.21	10.50	4537.96	3764.70	81984
1999	543.70	543.70	9.13	4952.33	4108.46	89470

The graphs below depict the significant growth of Connecticut's lodging-based travel and tourism industry.



Our report details the stock and geographic distribution of lodging accommodations, including campgrounds by type and by location (county, tourism district and town). We profile room and occupancy rates by type of accommodation, by location, and by season and day of week. We track the place of origin of tourists and travelers by county of activity for each type of accommodation. The table below provides an abbreviated inventory of Connecticut hotels/motels/resorts and campgrounds and their gross sales for 1999:

Hotels, Motels, Resorts Overview	
Number of Properties	484
Rooms/Units	28804
Average Rooms/Units	59.51
Annual Occupancy(Weighted by Rooms)	64%
Persons Occupying One Room	1.84
Length of Stay(nights)	2.46
Out-of-State Usage Rate(%)	73.36%
Average Room Rate(Weighted by Rooms)	100.48
HMR Traveler Expenditures in CT (1999 billion $)	1.82
Private and Public Campgrounds	
Number of Properties	70
Campsites	9545
Average Sites	136.36
Annual Occupancy(%)	51%
Persons Per Party	3.94
Length of Stay(nights)	3.65
Out-of-State Usage Rate(%)	38%
Average Site Rate	27.41
Campground Traveler Expenditures (1999 million $)	269.36

The following figures (Figures 15 and 19 from the report) detail the origin of out-of-state visitors to HMRs and campgrounds for 1999.

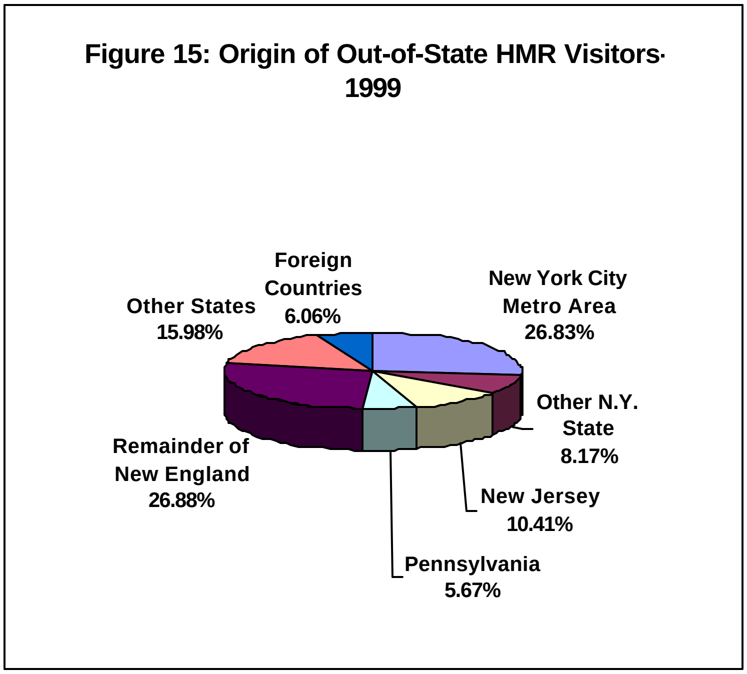


Figure 15: Origin of Out-of-State HMR Visitors-1999
Foreign Countries 6.06%
New York City Metro Area 26.83%
Other States 15.98%
Other N.Y. State 8.17%
Remainder of New England 26.88%
New Jersey 10.41%
Pennsylvania 5.67%

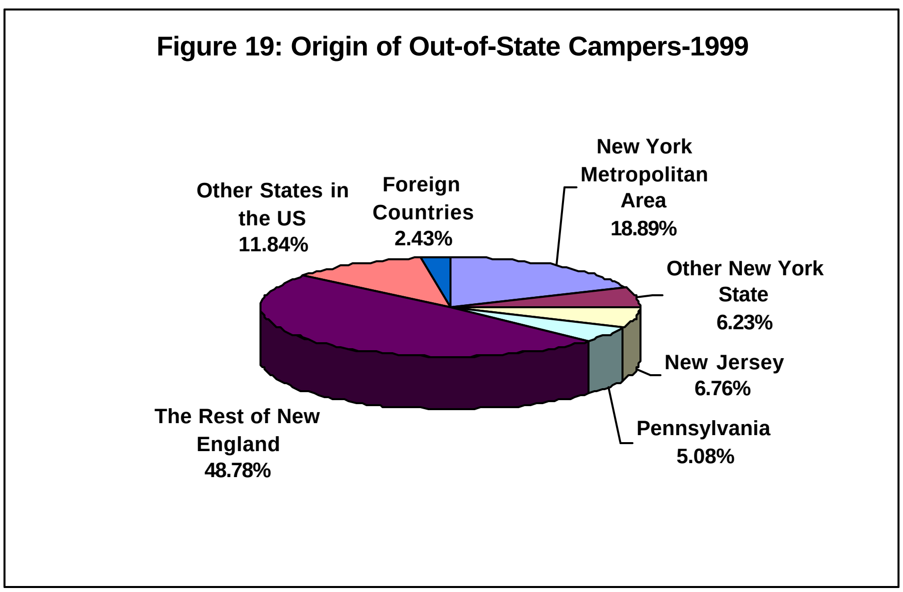


Figure 19: Origin of Out-of-State Campers-1999
New York Metropolitan Area 18.89%
Other States in the US 11.84%
Foreign Countries 2.43%
Other New York State 6.23%
New Jersey 6.76%
The Rest of New England 48.78%
Pennsylvania 5.08%

The importance of Connecticut's tourism and travel industry must be taken seriously. Tourism and travel sales in Connecticut in 1999 created more than 89,000 jobs in all sectors. This represents almost 4.3% of Connecticut's workforce. Gross state product increased by $4.108 billion or 3.3% of its estimated 1999 level. Total state tax revenue increased by more than $340 million, that is, by about 3.9% of gross state tax receipts in 1998. Net state tax revenue increased by more than $219 million or 2.5% of state tax receipts in 1998 (1998 state tax revenue is the latest data available). To understand fully the implication so this economic impact, we compute an economic benefit/cost ratio, which is the present value of personal income divided by the present value of induced government spending. The ratio is greater than 10. This argues that for every additional dollar of induced state and local government spending that supports travel and tourism activity in Connecticut, the people of the state enjoy an additional $10 of *aggregate* personal income. To translate this into the benefit that every State resident receives, we scale this benefit/cost ratio to the actual amount of induced government expenditure supporting travel and tourism, and the state's population: the project benefit is $154 in the wallet of every resident. Travel and tourism clearly benefit Connecticut enormously.

To put this economic impact in perspective, we have made 1998 comparisons with two other important sectors of Connecticut's economy, Insurance Carriers and Construction.

1998 GSP Levels in Important Connecticut Sectors Compared to Tourism		
Sectors	GSP, (Mil. $)	Tourism Relative to Others
Lodging-based Travel &Tourism	$3,765	
Construction	$4,957	75.95%
Insurance Carriers	$8,137	46.27%

In terms of gross state product (GSP), the travel and tourism industry is approaching the size of the state's Construction industry and is now almost half the size of Connecticut's most famous industry, the Insurance Carrier industry. This comparison underlines how the absolute size and strong growth in tourism and travel are to the strength and vitality of the State's economy.

Much of what the travel and tourism industry buys to sustain their operations is purchased from Connecticut firms and labor. The table below (Table J1 from Appendix J) shows regional purchase coefficients for some of the sectors related to travel and tourism.

Table J-1 Regional Purchase Coefficients for CT Tourism 1999

Industry	Purchases from CT Businesses	CT Labor	Total
Hotels	0.238	0.399	0.637
Eating & Drinking	0.236	0.329	0.565
Amusements	0.267	0.354	0.621
Local & Interurban Trans.	0.198	0.415	0.613
Air Trans.	0.255	0.344	0.599
Other Transportation	0.347	0.343	0.690
Rest of Retail	0.221	0.402	0.623

These numbers mean for example that the hotel industry purchases about 24% of its total input from Connecticut businesses while the amusements industry purchases about 27% of its inputs from Connecticut firms. Connecticut labor produces 40% of the hotel industry's output (value added basis). For each dollar of output the hotel industry produces, Connecticut businesses and labor contribute approximately 64 cents. Imported goods and labor provide the remainder.

We have emphasized that the impacts described here are conservative because the analysis included only data from lodging establishments and campgrounds. The analysis has no direct information from tourists and travelers themselves or from museums, aquariums, amusement parks, concerts, conventions and related attractions. In addition, this study has no data on a significant cluster of tourism and travel activity that takes place on Connecticut's rivers, lakes and Long Island Sound: fishing, recreational boating, and the myriad related and supporting economic activities. These activities and other attractions mentioned above should be included in subsequent studies to more accurately reflect the ***total*** value of travel and tourism to the Connecticut economy.

Furthermore, the growth in Connecticut's travel and tourism has been demonstrated statewide; it is not limited to the popular southeastern area of the state. This study understate does not fully capture the impact of the two Native American casinos and gaming destinations, Foxwoods and Mohegan Sun, because it included only lodging-based impacts. Thus, this analysis includes neither gaming activities nor day-trips associated with the casinos.

As a result of these limitations, we stress that the results of this study are a conservative estimate, based only on a survey of lodging establishment sales and then apportioning those sales to other tourist and traveler expenditures as a fraction of total tourist and traveler expenditures. These expenditures drive the REMI model from which we report total employment, GSP, GRP and aggregate income. Other studies may use direct employment in HMRs and other tourist and traveler attractions, as well as their procurement. Depending on the model used (REMI, IMPLAN, RIMS II), different results will be reported for identical inputs. For these reasons, comparison with other studies is difficult.

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THE ECONOMIC IMPACT OF LODGING-BASED TOURISM IN CONNECTICUT

Background

There is little doubt about the positive impact of tourism-related activities and expenditures on the Connecticut economy. The industries that provide services directly to travelers consume a large amount of output from other industries and generate thousands of jobs. But specific industry-related characteristics complicate the effort of measuring the actual magnitude of this impact. The first challenge is to define the tourism industry. When one looks at the Standard Industry Classification (SIC) codes, there is no specific industry identified as tourism.[1] The main reason for this lack of industry definition is that tourism expenditures stimulate many different sectors. According to the U.S. Travel and Tourism Satellite Accounts for 1996 and 1997, tourism activities would be underestimated if an analysis included only output of industries typically associated with tourism activities, that is, hotels and transportation. Such a measure of tourism activity would exclude expenditures on other types of activities, such as eating, drinking, and recreational activities.[2] It is clear that any analysis of the impact of tourism must thus begin by deciding on which sectors tourism has a significant influence. Using the Travel and Tourism Satellite Accounts' definitions, CCEA identified tourism-related industries and their SIC codes. Table A-1 in Appendix A shows these industries at the 2, 3, and 4-digit SIC level[3]. For purposes of this analysis we use the following definition: a tourist is anyone who travels outside their normal commuting pattern to another town to shop, eat or drink, stay in a hotel, motel or campground, or visit a museum, amusement park, casino, or any other tourist attraction, such as monuments, special events, gardens, or foliage.

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[1] A 1996 Connecticut Center for Economic Analysis (CCEA) study of tourism identified amusement, recreation, hotels, eating, education, and auto repair and services as related to tourism. *The Economy and Connecticut Tourism*, 1996.

[2] *Survey of Current Business*, U.S. Travel and Tourism Satellite Accounts for 1996 and 1997, 2000, p. 8.

[3] It is supplemented based on suggestions by the Connecticut Office of Tourism.

Total Impact

In this report, CCEA uses survey data that the Center for Survey Research and Analysis (CSRA) at the University of Connecticut generated to estimate economic impacts. CSRA surveyed hotels, motels, and resorts (HMRs) in Connecticut between March 15 and April 14, 2000 and campgrounds between March 15 and May 9, 2000. (See Appendices C and D for the questionnaire forms for both surveys.) The response rate for HMRs was 58% (280 hotels, motels, and lodging managers out of 484 HMRs responded) and for campgrounds it was 66% (36 campgrounds responded out of 55 surveyed).

CCEA used this survey data to estimate expenditures in different sectors by the type of accommodation used. The methodology used to get these expenditure estimations is the same used in a previous study by Dr. James Rovelstad.[4] CCEA uses data on the average party size, average occupancy rate, and average length of stay from the surveys to build the individual revenue estimations for HMRs and campgrounds separately. For non-respondents, CCEA estimates this data using county averages for each variable. The basic formula to obtain the revenues of these establishments is:

$$R = \sum_{i=1}^{n} r_{hi}$$

where:

R= Sales revenues (at state, county or town level) for all hotels, motels, and resorts for the year,

n = Total number of HMRs,

r_{hi} = Sales revenues for the i^{th} HMR,

h_i = i^{th} HMR,

and:

$$r_{hi} = N_{hi} * O_{hi} * U_{hi} * P_{hi},$$

where:

N_{hi} = Number of nights per year the i^{th} HMR is open,

[4] Center for Survey and Marketing Research, University of Wisconsin, *The Economic Impact of the Connecticut Travel and Tourism Industry 1992-1993*, January 1995.

O_{hi} = Average annual occupancy rate (or county average, if this question is not answered in the survey),

U_{hi} = Number of rooms or units, and

P_{hi} = Average room rate[5]

The methodology used to estimate campground revenues is the same as the HMR revenue estimation method. Instead of room rates and the number of rooms, we used the site rate and the average number of campsites in each campground facility.

The results of the surveys of establishments and this method provide the revenues for HMRs and campgrounds, which are expenditures made exclusively for lodging in these categories. Absent intercept surveys, there is no direct way to estimate tourism-related expenditures in other categories, such as restaurants, transportation, or retail sales. Using Rovelstad's formula, we estimated the expenditures in different categories by the type of accommodation used. According to Rovelstad's research, the estimated proportion of total expenditures for campground fees is 9.4%. We used 35.2% as the proportion of total expenditures for Lodging (HMRs). The fraction of Food/Restaurant, Recreation and other expenditure categories is also in proportion to the total expenditure. Detailed expenditure fractions appear in Appendix F.

Rovelstad's study estimates traveler category expenditures at the county level for "Visiting Friends and Relatives" on the basis of the number of households in each county as a percentage of all households in the state. Following the same methodology, this study projects "DT" (Day-Trippers), "Passing Through and Other" expenditures from HMR expenditures using the number of households in each county as a percentage of the state total. The number of households in each county as a percentage of total households in Connecticut used in this study is the same as in the1995 study. These percentages are given in the Appendix G in more detail. The formula is:

[5] In the original study, Rovelstad looks at the average party size, and, depending on whether it is less than two or more than two, he uses different room rates, such as a single room rate, double room rate, and the charge for additional occupants. However, in our survey, HMR managers were not asked to provide their specific room rates. Therefore we have only the average room rate, and no information about the charge for each additional person. Wherever survey data is not available, we used the county averages to estimate rates for the missing HMRs.

$$\text{Total Sales to Travelers in year 1999} = \frac{\text{Total Lodging Sales in Year 1999}}{\text{Lodging Purchases as a \% of Total Average Purchases per Party-Day}}$$

In this formula, the estimated proportion of total expenditures for campground fees is 9.4%, and the estimated proportion of total expenditures for commercial lodging is 35.2%. As explained previously, even though covering all visitor categories in the expenditure model is important to get an accurate picture of the expenditure pattern and the impact of the tourism industry in the state or in the region, it is not easy to get the expenditure figures for visitors who are staying with friends and relatives and who are passing through. In the absence of any credible alternative, this study uses the proportions of total expenditures from Rovelstad's study in each visitor category.

Tourism Sales

We calculate total sales from the travel industry to travelers in Connecticut to be $4.952 billion in 1999 dollars. Table 1-A gives the total impacts of travel in each county and in the state as a whole by type of accommodation used, such as hotel, motel, resort, campground, and for day-tripper, those staying with friends and relatives, and those who just pass through. Table 1-B shows the tourism expenditures by tourism district and by accommodation used. This study focuses on the 1999 impact.

As a check on the gross lodging establishment sales numbers obtained from the survey, we compare ours with those reported by the Department of Revenue Services (DRS) for fiscal years 1999 and 2000. The average of these two numbers yields a calendar year number of $409 million. This number is approximately $100 million less than our survey number because DRS does not report lodging sales for which it receives no room tax (12% of the room rate). Some government, nonprofit firm employees and military personnel pay no room tax, for example. People staying in hotels or motels on Indian reservation land pay room tax to the tribal nation, not to DRS. We estimate these omissions can conservatively account for the difference.

Table 1-A
Travel and Tourism Expenditures
by County and Accommodation Used
(1999 $ million)
Connecticut
1999

County	Hotel/Motel /Resort	Campground	Friends or Relatives	Day Trips	Pass Through	Other	Total	Percent
Fairfield	610.03	0.00	402.56	160.44	226.32	40.26	1439.61	29.07
Hartford	429.26	0.00	416.35	112.89	159.25	28.33	1146.09	23.14
Litchfield	40.80	41.11	86.69	10.73	15.14	2.69	197.16	3.98
Middlesex	104.29	53.04	69.36	27.43	38.69	6.88	299.70	6.05
New Haven	297.50	6.25	389.54	78.24	110.37	19.64	901.53	18.20
New London	303.98	119.01	124.83	79.95	112.78	20.06	760.60	15.36
Tolland	25.28	15.87	56.55	6.65	9.38	1.67	115.40	2.33
Windham	6.14	34.08	47.73	1.61	2.28	0.41	92.24	1.86
State Total*	1817.27	269.36	1593.61	477.94	674.21	119.94	4952.33	100.00

*County totals may not sum to state total due to rounding

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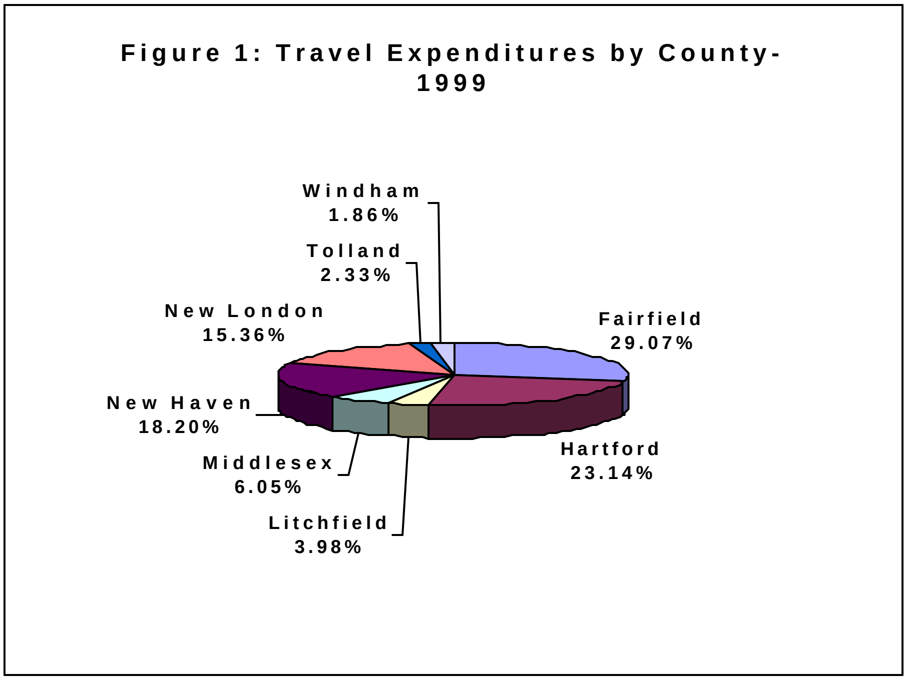
Table 1-B
Travel and Tourism Expenditures
by Tourism District and Accommodation Used
(1999 $ million)
Connecticut
1999

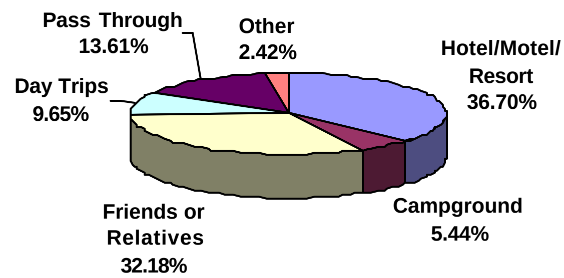
Tourism Districts	Hotel/Motel/ Resort	Campground	Friends or Relatives	Day Trips	Pass Through	Other	Total	Percent
Coastal Fairfield	454.11	0.00	299.67	119.43	168.47	29.97	1071.64	21.64
Waterbury region	70.54	7.09	97.00	18.55	26.17	4.66	224.02	4.52
Greater New Haven	197.73	3.21	229.66	52.00	73.36	13.05	569.00	11.49
Connecticut River Valley	175.96	54.55	163.20	46.28	65.28	11.61	516.88	10.44
Southeastern CT	295.92	115.86	121.52	77.83	109.79	19.53	740.45	14.95
Litchfield Hills	70.93	34.95	111.47	18.65	26.31	4.68	267.00	5.39
Central CT	66.06	0.00	64.08	17.37	24.51	4.36	176.38	3.56
Greater Hartford	276.20	9.06	286.19	72.64	102.47	18.23	764.79	15.44
Northeast CT	21.24	41.66	66.79	5.59	7.88	1.40	144.54	2.92
Housatonic Valley	111.56	0.60	74.50	29.34	41.39	7.36	264.76	5.35
North Central	77.12	2.38	79.61	20.28	28.61	5.09	213.10	4.30
Connecticut	1817.27	269.36	1593.61	477.94	674.21	119.94	4952.33	100.00

Figure 1 shows that Fairfield County makes the largest contribution to total state travel revenues with 29.07% (about $1.44 billion in 1999 dollars), followed by Hartford and New Haven Counties with 23.14% and 18.20%, respectively ($1.15 billion and $0.901 billion in 1999 dollars).



In terms of travel categories, HMRs make the largest contribution to Connecticut travel revenues in 1999 (Figure 2). The 1999 contribution of travelers staying with friends and relatives is also high. Those who are staying with friends and relatives comprise 32.18% of total traveler expenditures. Campers make the smallest proportional contribution to total revenues (5.44%).

Figure 2: Travel Expenditure by Trip Type-1999



There are substantial differences among the counties in their tourism performance. New London County receives the most campground revenue. In Windham County, the largest expenditures are from visitors who are staying with friends and relatives (about 51.8% of total travel expenditures in the county). In terms of hotel and motel expenditures, Fairfield County has the highest share, followed by Hartford County.

Table 2 reports spending patterns for the different types of accommodation used among the different expenditure categories (lodging, food/restaurant, recreation, gasoline, other auto-repair and related services, local transportation, retail, and other). Overall, the largest expenditure category is food or restaurant meals (about 34.58% of the total), followed by retail purchases and lodging expenses (see Figure 3). As expected, lodging expenses are the highest for the hotels and motels category, and, for those visitors who are staying with friends and relatives, the largest expenditure category is in retail. This category also includes expenditures made for groceries and liquor/beer, because, as in the previous study, we only considered purchases of prepared foods and served beverages in the food or restaurant category.

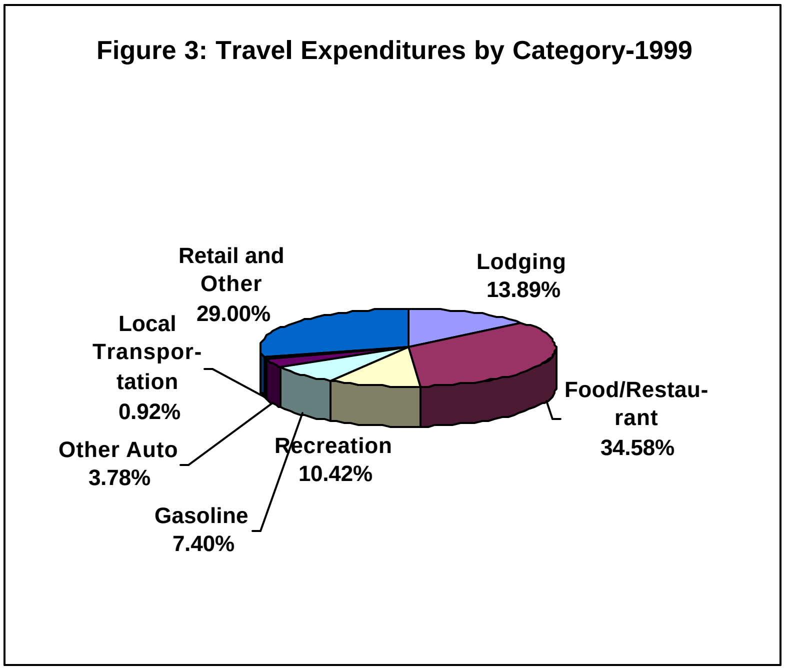


Figure 3: Travel Expenditures by Category-1999
Retail and Other 29.00%
Lodging 13.89%
Local Transpor-tation 0.92%
Food/Restau-rant 34.58%
Other Auto 3.78%
Recreation 10.42%
Gasoline 7.40%

Table 2
Traveler Expenditure Patterns by
Expenditure Category and Accommodation Used
(1999$ million)
1999

Expenditure Category	Hotel/Motel /Resort	Campground	Friends or Relatives	Day Trips	Pass Through	Other	Total
Lodging	639.68	25.32	N/A	N/A	N/A	25.19	690.19
Food/Restaurant	421.61	95.35	511.55	100.85	555.55	28.91	1713.81
Recreation	165.37	63.57	188.05	82.68	N/A	23.27	522.94
Gasoline	56.34	18.59	127.49	21.51	118.66	23.51	366.09
Other Auto	87.23	14.81	49.40	36.80	N/A	N/A	188.25
Local Transportation	32.71	N/A	11.16	1.43	N/A	N/A	45.30
Retail and Other	414.34	51.72	705.97	234.67	N/A	19.07	1425.76
State Total	1817.27	269.36	1593.61	477.94	674.21	119.94	4952.33

Table 3-A shows spending among different expenditure categories by county for 1999. Table 3-B shows the breakdown of spending by different expenditure categories and by tourism district. According to this table, for the state and for each county, food/restaurant is the most important expenditure category (34.61%). The next largest expenditure category is retail (28.79%). Lodging expenditures are low in Windham, Tolland, and Litchfield Counties relative to the other counties. Appendix E provides more detailed information about the travel expenditures in each county for different types of accommodation.

Table 3-A
Travel and Tourism Expenditures
by Expenditure Category
by County
(1999 $ million)
Connecticut
1999

County	Lodging	Food/Restaurant	Recreation	Gasoline	Other Auto	Local Transportation	Retail and Other	Total
Fairfield	223.18	500.79	138.58	106.06	54.11	14.28	402.60	1439.61
Hartford	157.05	395.11	113.22	85.28	42.20	10.98	342.25	1146.09
Litchfield	18.79	67.23	26.02	14.71	7.73	1.37	61.30	197.16
Middlesex	43.14	104.57	36.27	21.83	12.19	2.45	79.25	299.70
New Haven	109.43	308.46	91.86	67.61	32.72	8.32	283.13	901.53
New London	122.40	267.35	88.20	55.00	31.16	6.59	189.90	760.60
Tolland	10.74	39.17	14.19	8.68	4.35	0.87	37.39	115.40
Windham	5.45	31.12	14.59	6.91	3.77	0.45	29.94	92.24
State Total	690.19	1713.81	522.94	366.09	188.25	45.30	1425.76	4952.33
Percent	13.94	34.61	10.56	7.39	3.80	0.91	28.79	100.00

Note: These numbers are estimates based on survey data instead of data from DRS, because DRS reports only lodging revenue, without campground revenue and non-taxed lodging revenue. So we use estimates to be consistent.

Table 3-B
Travel and Tourism Expenditures
by Expenditure Category
by Tourism District
(1999 $ million)
Connecticut
1999

Tourism Districts	Lodging	Food/Restaurant	Recreation	Gasoline	Other Auto	Local Transportation	Retail and Other	Total
Coastal Fairfield	166.14	372.79	103.16	78.95	40.28	10.63	299.69	1071.64
Waterbury region	26.48	76.62	23.65	16.79	8.21	2.00	70.27	224.02
Greater New Haven	72.64	195.29	57.38	42.53	20.79	5.32	175.04	569.00
Connecticut River Valley	69.50	178.87	58.40	38.12	20.07	4.45	147.46	516.88
Southeastern CT	119.16	260.27	85.86	53.54	30.34	6.41	184.87	740.45
Litchfield Hills	29.23	91.36	31.99	19.92	10.22	2.11	82.17	267.00
Central CT	24.17	60.81	17.42	13.12	6.50	1.69	52.67	176.38
Greater Hartford	101.90	263.31	77.15	56.96	28.22	7.19	230.06	764.79
Northeast CT	11.69	49.12	20.88	10.79	5.81	0.87	45.39	144.54
Housatonic Valley	40.87	92.08	25.59	19.51	9.96	2.62	74.13	264.76
North Central	28.44	73.37	21.47	15.87	7.86	2.01	64.08	213.10
Connecticut	690.19	1713.81	522.94	366.09	188.25	45.30	1425.76	4952.33

Methodology

Tourism and travel expenditures affect the economic activity in the region through two channels. One is the direct impact on the state economy. This includes expenditures made by tourists for transportation, food, lodging, gas, and so on, taxes paid to local governments and the state, full time and part time jobs created through these expenditures, and wages and incomes earned by workers in tourism-related industries. The other channel is the indirect effect, which are the additional business-to-business expenditures and jobs resulting from tourism-related activities. Measuring the direct impact is straightforward. But capturing the full indirect effects of travel and tourism expenditures may be difficult.

Many tourism impact models are based on input-output analysis. The previous study about the economic impact of the Connecticut travel and tourism industry, one the Center for Survey and Marketing Research at the University of Wisconsin conducted, used a specialized mathematical model, TRAITS II, designed by Dr. James Rovelstad. It uses survey data about the characteristics of a state's tourist accommodations (hotels, motels, resorts and campgrounds) to estimate the impact of tourism on other industries. According to Rovelstad, this model (TRAITS II) has some advantages over other available methods. First, it only uses the expenditures of tourists, not those of local residents. Second, it does not require memory recall, as do household telephone interviews used in post-trip surveys. Third, the length of the trip is not important. But TRAITS II has some limitations. The most important omission is expenditures of travelers who stay with friends and relatives, day-trippers, and people who are just passing through.

IMPLAN (Impact Analysis for Planning), developed by the Minnesota IMPLAN Group, and RIMS II (Regional Input-Output Modeling System), developed by the U.S. Bureau of Economic Analysis, are the most commonly used models to asses the economic impact of tourism-related activities on other sectors. The difference between these two models results from the method of calculating the induced impacts. Both models depend on the multipliers calculated through the Input-Output framework to estimate the direct, indirect and induced effects. Direct effects represent the responses (for example, a change in employment or output) for a given industry per million dollars of final demand for that same industry. Indirect effects are the responses by all local industries that flow from the initial industry's purchasing per million dollars of final demand, while induced effects represent the responses by all local industries resulting from the expenditures of new household income generated by the direct and indirect effects.

The Travel Industry Association of America (TIA) developed a model, the Travel Economic Impact Model (TEIM), to provide annual estimates of the impact of travel activities and resulting revenues and employment and tax receipts generated through these activities. In this model the travel industry is defined as the combination of 16 different industries providing goods and services to travelers at the retail level. It calculates traveler expenditures in a certain facility by multiplying the number of nights spent in that facility (for example, hotel/motel or campground) by the average cost per night per travel party staying in that facility. The model can be used to calculate business receipts defined as the difference between traveler spending in each category less sales and excise taxes paid, the number of jobs supported by that amount of business receipts, and the fiscal impact. The limitations of that model are related to the definition of travel expenditures. In the TEIM model two kinds of travel-related expenditures are not included. One is the purchase of goods for trip preparation, such as travel books, sporting equipment, maps, and so on. The second type of spending excluded from the model is major consumer durables generally related to outdoor recreation on trips[6].

Another commonly used model for economic impact studies is REMI that we use for the current analysis. REMI is a dynamic, multi-sector, regional model created by Regional Economic Models, Inc. of Amherst, MA. This model provides a detailed 35-year forecast for all eight counties in Connecticut and any amalgamation of these counties. The REMI model includes all of the major inter-industry linkages among 466 private industries, which are aggregated into 49 major industrial sectors. With the addition of farming and three public sectors (state & local government, civilian federal government, and military), there is a total of 53 sectors represented in the model for Connecticut's eight counties.

At the heart of the model is the extensive modeling of sectoral input-output relationships for the states by the U.S. Department of Commerce. The REMI model creates a dynamic interface among the many sectors of the economy that allows the model

[6] *Travel Industry Association Report*, p.3.

economy to adjust and react just as the real economy would. In addition, there is a substantial demographic component to the model, which is able to track the inflow and outflow of population by demographic categories based on economic conditions.

Each of these economic impact models, including the REMI model, measures the Connecticut economy in its present form as a baseline forecast. Changes in the economy are either added to or subtracted from that baseline forecast depending on the nature of the change. Because the tourism sector in the state ***already exists*** in the baseline model, the most accurate measure of tourism's current impact is estimated by ***counterfactually*** removing the tourism sector from the model economy. Intuitively, the results contained in this report measure the losses to the economy resulting from the disappearance of the tourism sector. However, these same results can be interpreted as the positive impact of tourism's continuing operations by reversing the signs of the economic variables. Thus all tables show the current impact of the tourism industry as positive numbers. For the baseline values of the variables we discussed, see Table B-1 in Appendix B.

In this analysis, we consider the possibility that the tourism sector does not exist in the State of Connecticut. It answers the question, how much would Connecticut and its several county economies suffer if tourism facilities and related services disappeared from the state? This approach then tells us how much the tourism sector contributes to the state and county economies. We subtracted the expenditures in tourism-related sectors from each county in the model. We identified seven sectors (expenditure categories). The first is the expenditures made for lodging in different categories. In REMI there is only one sector we can use for lodging expenditures, namely hotels. We cannot separate campground expenditures from those made in hotels. Therefore, we put all expenditures for lodging in the 'hotels' category. The second category is food/restaurant, which includes "purchases of prepared foods and served beverages in eat-in or carry-out restaurants". Therefore we used "food and beverage spending by non-residents" as our corresponding sector in the REMI analysis, breaking into food for off-premise consumption (excluding alcohol), purchased meals and beverages, and alcoholic beverages. The third expenditure category is recreation and includes many kinds of expenditures made for recreational purposes, such as admission fees, equipment rental fees, etc. In REMI, there is a category called amusement and recreation that we used for the third category. Gasoline expenses were placed under petroleum products. The fifth expenditure category is called "other auto expenses", and it includes all expenditures made for parking services, car rental, repair services and parts. In the REMI model, there is a sector called "auto repair and services". Instead of using this sector, which includes expenditures in this category made by residents, we used three sub sectors, Tires and Parts, Automobile Repair and Wheel Goods. The next category is local transportation and includes busses, taxis, and light rail fares. The last expenditure category is "retail and other". In our model, we put "retail and other" under different consumer demand categories in REMI, such as other durable spending by non-residents (jewelry and watches, books and maps, etc), clothing and shoe spending by non-residents, and so on.

Summarizing our input variables as such:

1) Hotel Sales
2) Food and Beverage Spending by non-residents
3) Amusement and Recreation
4) Petroleum Product
5) Other Auto Expenses
6) Local Transportation
7) Other Retail Spending by non-residents

Results from the REMI Model:

Most economic models, including the REMI model, measure the Connecticut economy in its present form as a baseline forecast. Any changes in the economy are either added to or subtracted from that baseline depending on the nature of the change. Because the tourism sector already exists in the baseline model, the most accurate measure of tourism's impact is estimated by removing the expenditures made by travelers in the region from the baseline economy. Intuitively, the results contained in this report measure the losses to the economy resulting from the closure or disappearance of tourism sector. The current economic benefits that accrue as a result of the tourism sector's presence in the state are best modeled by removing it. This approach is a counterfactual analysis commonly used to determine the positive impact of existing operations.

The key variables reported are gross state product (GSP), aggregate output and aggregate personal income. GSP is the dollar value of all ***final*** goods and services produced in the state in one year. GSP is calculated using a value-added approach, in which the value added at each stage of the production process is aggregated to yield the final value. Intermediate goods are excluded from this calculation to avoid double counting. The value added of all goods and services produced in a county is referred as Gross Regional Product (GRP). When we remove tourism-related expenditures from the State and regional economies, we introduce a negative shock to the economy. This influences the values of economic variables such as output, employment, and wages in the whole economy. ***After the initial shock, the economy begins adjusting to a new long run equilibrium, then stays relatively stable at that level. In our study, we think the long run equilibrium is the real economic impact of tourism and the values of the variables reported below are their values in the terminal year (2020) of the study period.***

The largest county GRP impact in the State is in Hartford County. The impact in GRP is $1,106 million for Hartford compared to $4,109 million for the State of Connecticut. The smallest impact is in Windham County with a $98 million increase in its GRP due to tourism expenditures.

Another important variable is the change in aggregate personal income of State residents (personal income is defined as the sum of wage and salary disbursements, other labor income, proprietors' income, rental income, personal dividend income, personal interest income, and transfer payments, less personal contributions for social insurance.) Counterfactually, removing tourism-related expenditures from the state and county economies causes the personal income of residents to decrease. Effectively, the loss of expenditures related to the tourism sector would cause large-scale unemployment particularly in service occupations, which, in turn, causes a significant drop in aggregate personal income. The largest county impact on personal income is in Fairfield County. This is not surprising because in all expenditure categories, we subtracted more in Fairfield County. Personal income in Fairfield County increases by $1.09 billion, and, in the State, it increases by $3.88 billion (a 3.06% increase from baseline economy). The change in personal income of Windham County residents is smaller than all other counties with an increase of $105 million.

Figure 4 depicts the changes in GSP and personal income for all counties and for the State as a whole.

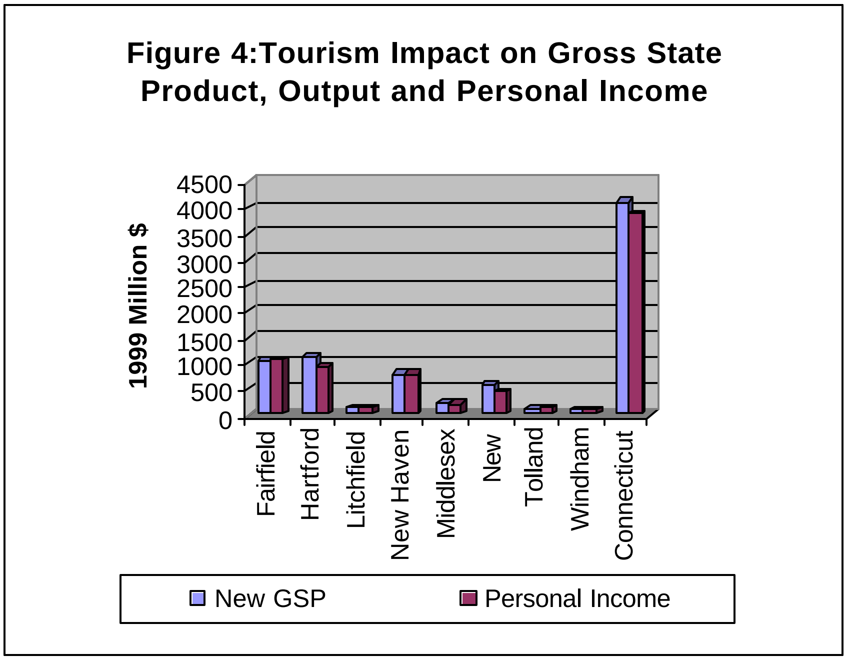
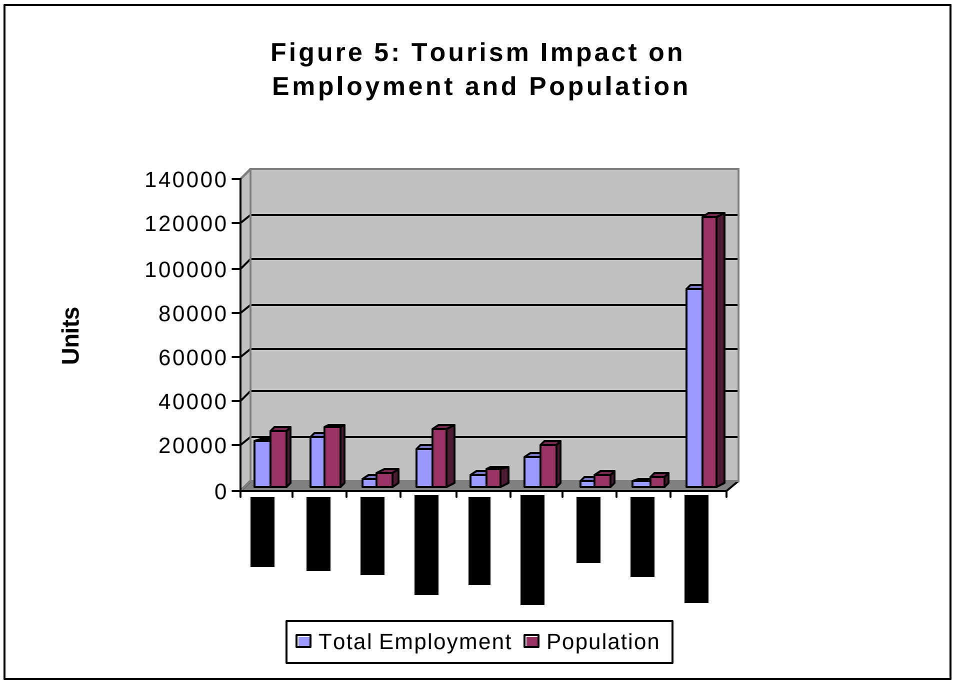


Figure 4:Tourism Impact on Gross State Product, Output and Personal Income

In addition to GSP and personal income, the tourism sector creates a significant amount of employment in the counties and the state as a whole, relative to the baseline forecast. The tourism industry creates 89,470 new jobs relative to the baseline (4.3% more than the baseline forecast) in Connecticut. Most of the employment increase occurs in Hartford County (22,960 jobs), followed by Fairfield County with 20,480 jobs.

The consequent increases in personal income and economic activity will cause some people to move to the State because of increased job opportunities. The change in the population in the state as a whole and in the counties separately is highly significant compared to the baseline forecast. Connecticut population increases 122,000 from the existence of tourism-related expenditures in the economy. This number corresponds to a 3.7% increase in population relative to the baseline forecast. Hartford County experiences the largest impact on population with an increase of 26,580 people. Figure 5 shows the changes in the population for the counties and for the State in annual averages.



These key economic variables in our analysis demonstrate the importance of the tourism sector not only to the regional economies, but to the state as a whole. The tourism sector makes a substantial economic contribution to the State of Connecticut and its regional economies. The second part of our analysis examines the changes in state and local tax revenue associated with the tourism sector in Connecticut.

Tax Impact

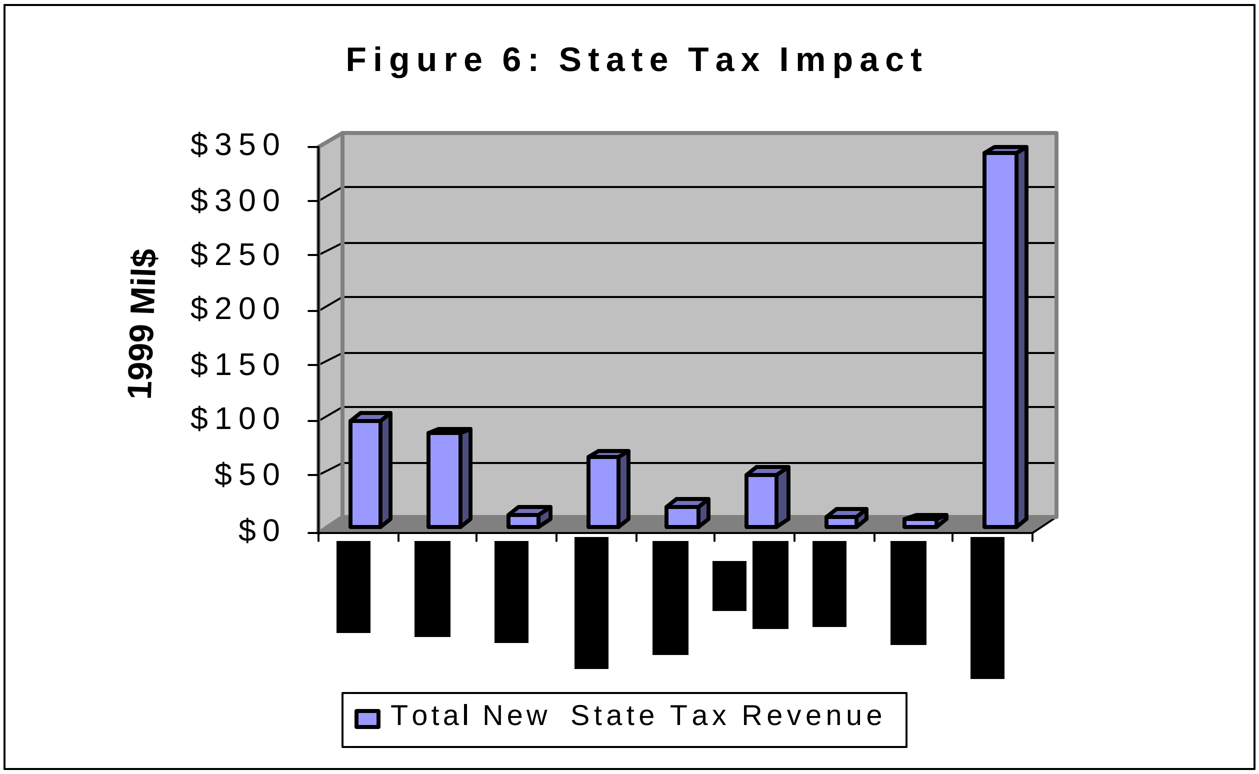
As explained above, the baseline forecast already incorporates the existence of the tourism sector, and we counterfactually remove it from the economy to determine its current impact on the economy. The loss of the sector would cause a decline in general economic activity. In particular, Gross State Product (GSP) and personal income would fall resulting in a decline in income, sales, use and profits taxes in the state. In addition, the decline of employment and population leads to a decrease in the value of local property and, thus, local property taxes. Conversely, continuing and expanding tourism activities in the state increase economic activity and all tax revenues. In our analysis we have included the 12% state room occupancy tax. This tax makes a large difference in overall state tax revenue, and emphasizes the importance of the tourism sector in the state economy. For example, in Fairfield County the room tax revenue is $23 million in 1999 dollars.

In addition to these basic tax revenue changes, tourism-related expenditures change *induced* government spending. As people move to the state and there is more economic activity, the government spends more to maintain the level of public services, such as for education and police, than in the past. This adjustment occurs endogenously, that is, within the model based on current and projected levels of government spending and population change.

State tax revenue depends on general economic activity. The increase in GSP and personal income that accompanies the increase in expenditures made through the tourism sector increases tax collections through the channels discussed above both in the county economies and the state. Nevertheless, with these two essential economic variables increasing, state tax revenues increase as well. Overall state taxes increase $340.37 million, which includes $98 million from Fairfield County, $84 million from Hartford County, $64 million from New Haven County, $48 million from New London County, $19 million from Middlesex County, $12 million from Litchfield County, $9 million from Tolland County and $6 million from Windham County (all figures above and below in 1999 dollars except as noted).

As individuals move to the State, induced government spending increases. Statewide induced government spending increases by $502 million. Among the counties, the largest impact on induced government spending is in Hartford County. Because of the tourism sector, induced government spending increases by $135 million in Hartford County. One possible explanation for this relatively higher induced government spending increase in Hartford County is that population in Hartford increases more than other counties as a result of tourism-related expenditures. More people induce more government spending.

The changes in total state tax revenue for the State as a whole and for each county separately are given in Figure 6.



The tourism sector increases local tax revenue. Tourism establishments pay property tax. Changes in local taxes also come from changes in the population in each county. As people move to the state, they require housing and cars, so property taxes increase. The tourism sector is more beneficial in terms of state tax revenue than it is in terms of local tax revenues (both total and net tax revenues). Tourism generates $181 million in local tax revenue. Figure 7 shows the increase the local tax revenue caused by tourism industry.

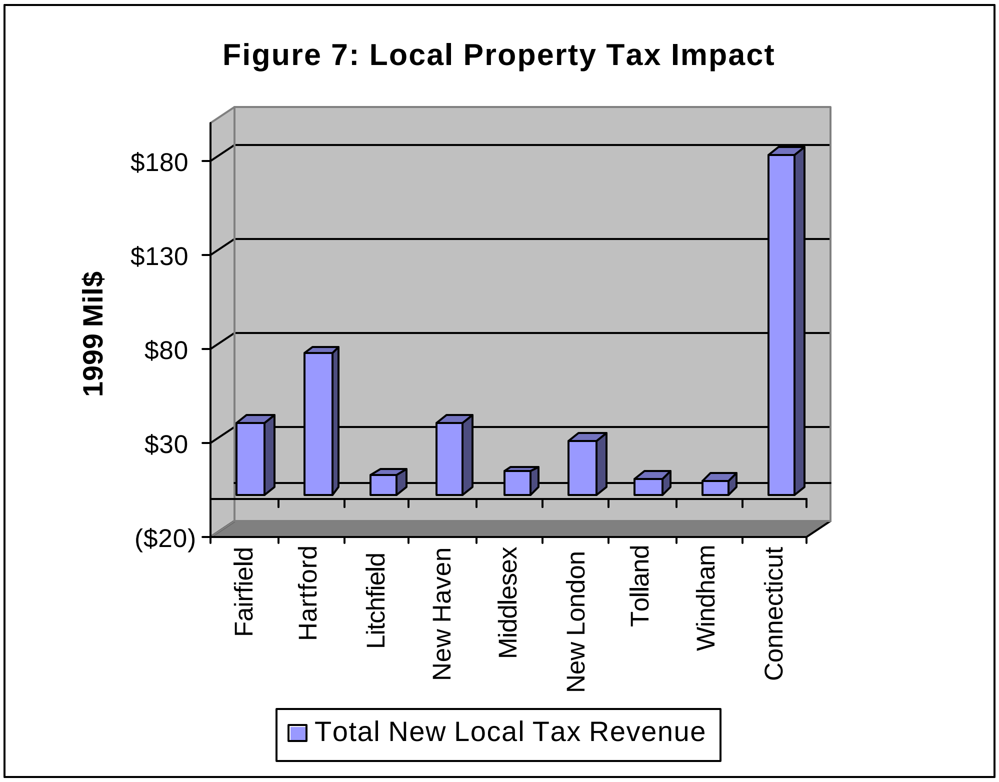


Table 4 summarizes REMI economic and fiscal results for each county and the State.

Table 4: Summary Table for Tourism Sector Economic Impact

Variable	Fairfield	Hartford	Litchfield	New Haven	Middlesex	New London	Tolland	Windham	Connecticut
Employment (Units)	20480	22960	3818	17480	5638	13690	2956	2445	89470
Gross State Product ($ 1999 Mil)	1054.80	1106.33	154.77	789.65	222.32	559.18	121.82	98.03	4108.46
Personal Income ($ 1999 Mil)	1086.72	920.99	150.39	791.44	218.80	466.31	145.59	105.00	3874.34
Disposable Income ($ 1999 Mil)	887.79	742.07	122.13	636.62	177.78	378.85	118.75	84.42	3140.57
Population (Units)	25540	26580	6621	26020	7953	19010	5647	4603	122000
Total New State Tax Revenue ($ 1999 Mil)	97.66	84.03	12.30	63.80	19.04	47.82	9.34	6.34	340.37
Total New Local Tax Revenue ($ 1999 Mil)	38.19	75.02	9.82	38.52	11.74	28.53	8.29	7.70	181.03
Induced Gov't Spending ($ 1999 Mil)	85.49	134.68	19.63	92.60	32.78	77.16	39.08	19.72	502.45
Benefit-Cost Ratio(PV of Pers Inc / PV of Incent & Induc Gov't Spend)	15.47	8.79	13.40	9.47	11.54	8.33	5.37	8.00	10.08

Results at the Tourism District Level

REMI reports results at county and state levels. To get the economic impact at the tourism district level, we first identified the towns in each tourism district[7] and in each county. For some tourism districts, such as the Coastal Fairfield Tourism District, all towns in the tourism district lie in Fairfield County. In this case, we calculate the fraction of personal income in the towns belonging both to the Coastal Fairfield Tourism District and Fairfield County with respect to total personal income in Fairfield County. Then we scale the economic impact variables (employment, GRP, etc.) by that fraction and obtain the impacts in the Coastal Fairfield Tourism District. For those tourism districts consisting of towns from more than one county, such as the Waterbury Region, which consists of seven towns from New Haven County and two towns from Litchfield County, we calculate two fractions, one equal to the personal income of the seven towns from both the Waterbury Region and New Haven County divided by the total personal income in New Haven County. The other fraction is calculated in the same way for Litchfield County. Then we multiply each fraction by each county's economic impact variable values and sum the product to get the total impacts in the Waterbury Region.

In terms of tourism districts for all the variables considered above, Coastal Fairfield and Greater Hartford experience the greatest impact. The tourism sectors in Coastal Fairfield and Greater Hartford increase total employment by 15,237 jobs and 15,669 jobs, respectively. The smallest increase in total employment is in the Central Connecticut Tourism District with 3534 additional jobs resulting from tourism-related expenditures.

Tourism-related expenditures increase the personal incomes of residents in each tourism district. Personal income in the Coastal Fairfield Tourism District increases by $809 million and in Greater Hartford by $644 million (in 1999 dollars).

Table 5 gives the summary of REMI results for each tourism district. Not shown are the net state and local tax revenues (aggregated) at the state level after subtracting a portion of induced government spending from each. For Connecticut, net new state tax revenue is $31.36 million and net new local tax revenue (loss) is $-12.42 million.

[7] Data from the Connecticut General Statutes.

Table 5: Summary Table for Tourism Sector Economic Impact By Tourism Districts

Tourism Districts	Total Employment (Units)	Gross Regional Product($ Mil)	Personal Income ($ Mil)	Disposable Income ($ Mil)	Population (Units)	Total New State Tax Revenue ($ Mil)	Total New Local Tax Revenue ($ Mil)	Induced Gov't Spending ($ Mil)
Coastal Fairfield	15237	784.77	808.52	660.52	19002	72.66	28.42	63.61
Waterbury region	4343	193.72	193.50	155.81	6595	15.62	9.77	22.92
Greater New Haven	10484	483.17	486.44	392.29	15241	39.95	22.59	53.84
Connecticut River Valley	9884	414.13	411.04	332.41	14273	34.53	21.10	55.27
Southeastern CT	13327	544.36	453.95	368.81	18506	46.55	27.78	75.11
Litchfield Hills	5221	225.42	209.62	169.68	8068	17.69	14.29	28.01
Central CT	3534	170.26	141.74	114.20	4091	12.93	11.55	20.73
Greater Hartford	15669	743.22	643.93	519.66	19410	56.50	50.42	104.32
Northeast CT	3631	146.78	157.92	127.55	6680	10.21	10.76	32.65
Housatonic Valley	3781	194.14	199.88	163.28	4743	17.95	7.09	15.84
North Central	4366	207.27	179.19	144.59	5389	15.76	14.06	28.88
Connecticut	89470	4108.46	3874.34	3140.57	122000	340.37	181.03	502.45

PROFILE AND PERFORMANCE OF CONNECTICUT ACCOMMODATIONS

Hotels/Motels/Resorts (HMRs)

According to the current survey results, the largest portion (29.75%) of the 484 accommodation establishments in Connecticut in 1999 was bed and breakfast, followed by inns and guesthouses (24.17%), motels (21.49%) and hotels (20.45%). Table 6 shows the distribution of establishments by type.

Table 6
Hotel, Motel, Resort Profile of Responding HMRs
Connecticut
1999

Type	Number	Percent
Hotel	99	20.45
Resort Hotel	10	2.07
Resort (Cottages and Cabins)	6	1.24
Motel/Motor Hotel	104	21.49
Bed and Breakfast	144	29.75
Guest House/Inn/Tourist Court	117	24.17
Motel with Cottages	1	0.21
Others (Hostel, Boat&Breakfast)	3	0.62
Total	484	100.00

Among the counties, New London has the greatest number of establishments (104), while in terms of number of units (rooms), Hartford County ranks first with 7,526 units. The State in total has 484 establishments with 28,804 HMR units. Table 7, Figure 8 and Figure 9 show the distribution of HMR establishments and number of units.

Table 7 H/M/Rs by County 1999				
County		Number of Establishments	Number of Units	Percent in Terms of # of Units
Fairfield		64	7047	24.47
Hartford		90	7526	26.13
Litchfield		66	952	3.31
Middlesex		41	1704	5.92
New Haven		74	5327	18.49
New London		104	5417	18.81
Tolland		21	538	1.87
Windham		24	293	1.02
State Total		484	28804	100.00

Figure 8: Share of HMR Establishments by County 1999

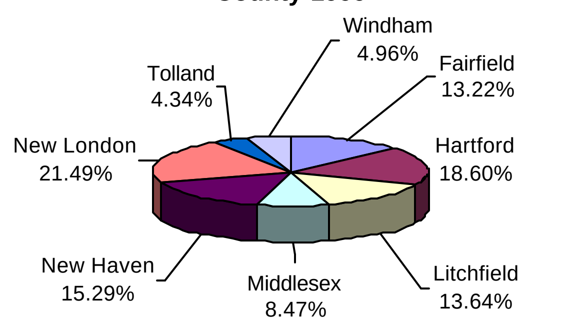
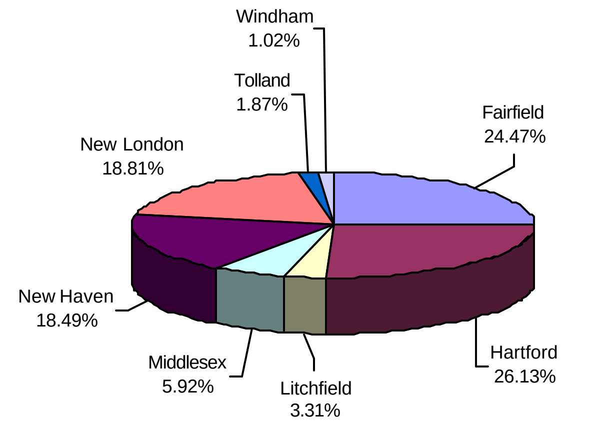


Figure 9: Share of HMR Rooms by County 1999



For the 11 tourism districts, Southeastern Connecticut has the largest number of HMR establishments (101) and rooms (5,339). Greater Hartford has 57 establishments and 4,688 rooms, ranking second in terms of number of rooms. Table 8, Figure 10 and 11 report this information.

Table 8 Hotels/Motels/Resorts by Tourism District Connecticut 1999			
Tourism District	Number of Establishments	Number of Units	Percent in Terms of # of Units
Coastal Fairfield County	39	4546	15.78
Waterbury Region	11	743	2.58
Greater New Haven	37	3678	12.77
Shoreline	71	3105	10.78
Southeastern CT	101	5339	18.54
Litchfield Hills	69	1409	4.89
Central CT	19	969	3.36
Greater Hartford	57	4688	16.28
Northeast CT	36	560	1.94
Housatonic Valley	20	1549	5.38
CT North Central	24	2218	7.70
State Total	484	28804	100.00

Table 9 reports the 1999 number of HMRs by town. When we look at Connecticut towns and cities, Mystic with 28 establishments ranks first. The other towns have only a few hotels, motels, or resorts.

Figure 10: Share of HMR Establishments by Tourism District 1999

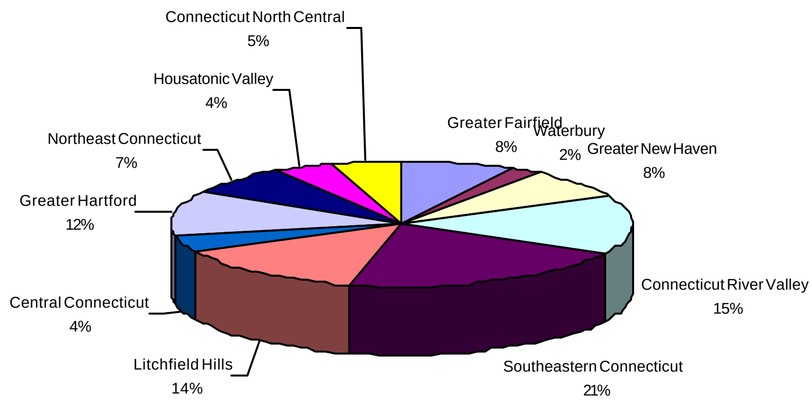


Figure 11: Share of HMR Rooms by Tourism District
1999

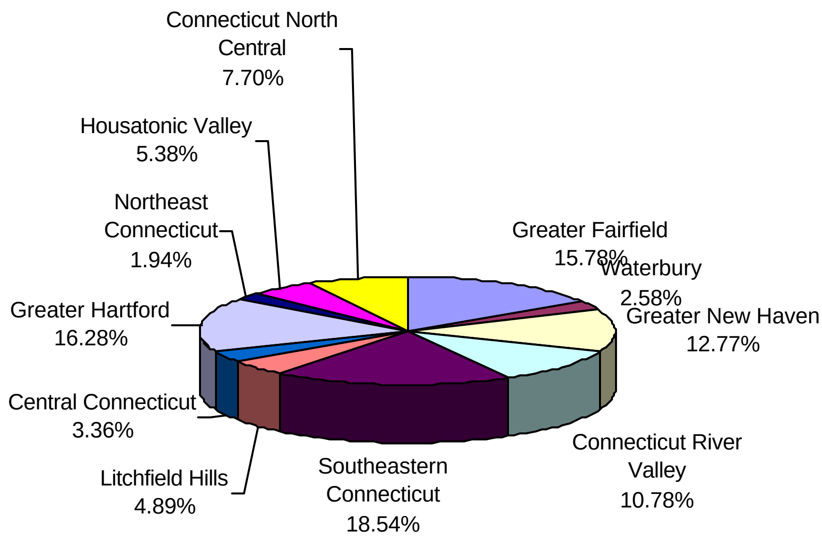


Table 9 Number of Hotels/Motels/Resorts By City/town and State Connecticut 1999		
City	**Number**	**Percent of Total Number of HMRs**
Ashford	2	0.41
Avon	1	0.21
Barkhamsted	2	0.41
Berlin	6	1.24
Bethany	1	0.21
Bethel	4	0.83
Bethlehem	1	0.21
Bolton	1	0.21
Bozrah	3	0.62
Branford	8	1.65
Bridgeport	1	0.21
Bristol	2	0.41
Brookfield	1	0.21
Brooklyn	1	0.21
Canton	1	0.21
Central Village	1	0.21
Chaplin	1	0.21
Cheshire	1	0.21
Chester	2	0.41
Clinton	3	0.62
Columbia	2	0.41
Cornwall	1	0.21
Cornwall Bridge	2	0.41
Cornwall Bridge, Warren	1	0.21
Coventry	3	0.62
Cromwell	4	0.83
Danbury	9	1.86
Darien	1	0.21
Dayville	1	0.21
Deep River	1	0.21
East Haddam	4	0.83
East Hampton	1	0.21
East Hartford	5	1.03
East Haven	1	0.21
East Lyme	1	0.21
East Windsor	3	0.62
Ellington	1	0.21

Table 9 Continued Number of Hotels/Motels/Resorts By City/town and State Connecticut 1999		
City	Number	Percent of Total Number of HMRs
Enfield	5	1.03
Essex	1	0.21
Fairfield	4	0.83
Farmington	5	1.03
Glastonbury	2	0.41
Goshen	1	0.21
Granby	2	0.41
Greenwich	2	0.41
Griswold	1	0.21
Groton	13	2.69
Guilford	6	1.24
Hamden	2	0.41
Hartford	10	2.07
Ivoryton	1	0.21
Kent	6	1.24
Killingworth	1	0.21
Lakeville	4	0.83
Lebanon	1	0.21
Ledyard	4	0.83
Lisbon	1	0.21
Litchfield	4	0.83
Lyme	1	0.21
Madison	6	1.24
Manchester	4	0.83
Mansfield Center	1	0.21
Mashantucket	3	0.62
Meriden	7	1.45
Middlebury	1	0.21
Middlefield	1	0.21
Middletown	1	0.21
Milford	12	2.48
Montville	1	0.21
Moodus	2	0.41
Moosup	1	0.21
Mystic	28	5.79
Naugatuck	1	0.21
New Britain	1	0.21
New Canaan	3	0.62
New Hartford	1	0.21
New Haven	11	2.27

Table 9 Continued Number of Hotels/Motels/Resorts By City/town and State Connecticut 1999		
City	Number	Percent of Total Number of HMRs
New London	6	1.24
New Milford	5	1.03
New Preston	7	1.45
Newington	5	1.03
Niantic	9	1.86
Norfolk	5	1.03
North Haven	1	0.21
North Stonington	6	1.24
Northfield	1	0.21
Norwalk	8	1.65
Norwich	5	1.03
Old Greenwich	2	0.41
Old Lyme	3	0.62
Old Mystic	1	0.21
Old Saybrook	10	2.07
Orange	1	0.21
Plainfield	1	0.21
Plainville	2	0.41
Pomfret	4	0.83
Pomfret Center	1	0.21
Poquetanuck	1	0.21
Portland	2	0.41
Preston	4	0.83
Putnam	3	0.62
Ridgefield	5	1.03
Riverside	1	0.21
Riverton	1	0.21
Rocky Hill	3	0.62
Salisbury	4	0.83
Sandy Hook	1	0.21
Scotland	1	0.21
Seymour	1	0.21
Sharon	4	0.83
Shelton	5	1.03
Simsbury	5	1.03
Somersville	1	0.21
South Windsor	2	0.41
Southbury	3	0.62
Southington	9	1.86
Southport	1	0.21

Table 9 Continued Number of Hotels/Motels/Resorts By City/town and State Connecticut 1999		
City	Number	Percent of Total Number of HMRs
Stamford	8	1.65
Stonington	3	0.62
Stonington Village	1	0.21
Storrs	2	0.41
Storrs,	1	0.21
Stratford	5	1.03
Terryville	2	0.41
Thompson	2	0.41
Tolland	3	0.62
Torrington	3	0.62
Trumbull	1	0.21
Uncasville	1	0.21
Union	1	0.21
Vernon	4	0.83
Voluntown	1	0.21
Wallingford	3	0.62
Washington	1	0.21
Waterbury	6	1.24
Waterford	4	0.83
Watertown	1	0.21
West Cornwall	1	0.21
West Goshen	1	0.21
West Hartford	1	0.21
West Haven	2	0.41
Westbrook	7	1.45
Westport	3	0.62
Wethersfield	4	0.83
Willington	1	0.21
Windsor	4	0.83
Windsor Locks	9	1.86
Wolcott	1	0.21
Woodbury	6	1.24
Woodstock	5	1.03
Total	484	100.00

Across the state, the number of rooms available in any establishment varies widely from small-scale 1-5 rooms to 151 and more rooms. The largest portion of the state's hotels, motels and resorts, however, consists of small establishments with 1 to 5 rooms. Table 10 presents this information.

Table 10
Hotels/Motels/Resorts Arranged by Room Count
Connecticut
1999

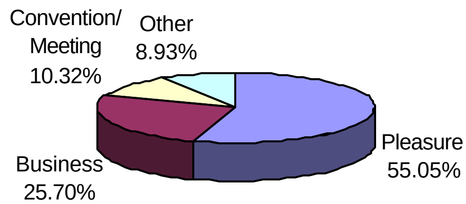
Guest Rooms Per Establishment	Number	Percent
1-5	118	24.40
6-10	44	8.90
11-20	55	11.40
21-50	87	18.00
51-100	69	14.30
101-150	70	14.50
151+	41	8.50
State Total	484	100.00

The proportion of large lodging facilities (HMRs with more than 100 rooms) in the state is small. Most of the large HMRs (more than 50 rooms) are located in Fairfield, Hartford, New Haven, and New London Counties. The small-scale establishments dominate in other counties (Tolland, Middlesex, and Litchfield Counties). Table 11 reports these numbers.

Table 11
Distribution of Hotels/Motels/Resorts by Size and County
CONNECTICUT
1999
(Percentage)

Guest Rooms	Fairfield (n=64)	Hartford (n=90)	Litchfield (n=66)	Middlesex (n=41)	New Haven (n=74)	New London (n=104)	Tolland (n=21)	Windham (n=24)	State (n=484)
1-5	1.60	15.60	6.10	19.50	16.20	26.00	61.90	62.50	24.40
6-10	1.60	2.20	13.60	12.20	5.40	12.50	4.80	8.30	8.90
11-20	14.10	12.20	40.90	14.60	9.50	8.70	4.80	N/A	11.40
21-50	20.30	16.70	18.20	7.30	16.20	18.30	N/A	29.20	18.00
51-100	21.90	13.30	13.60	29.30	21.60	13.50	23.80	N/A	14.30
101-150	15.60	28.90	7.60	7.30	20.30	14.40	4.80	N/A	14.50
151+	21.90	11.10	N/A	7.40	10.80	3.80	N/A	N/A	8.50

Figure 12: Main Purpose of Trip by HMR Guests-1999



From the current survey results, we can determine the purpose of the trip for guests staying in these establishments. Figure 12 and Table 12 show the distribution of the survey responses. According to data provided by establishments, pleasure trips statewide have the highest frequency (55.05%), followed by business trips (25.70%).

Table 12
Purpose of Trip of Visitors to Hotels/Motels/Resorts by County
Connecticut
1999

County	Purpose of Trip			
	Pleasure	Business	Convention /Meeting	Other
Fairfield	33.47	46.93	12.90	6.71
Hartford	29.14	38.90	15.10	16.87
Litchfield	64.71	14.53	9.26	11.50
Middlesex	70.08	14.87	9.80	5.25
New Haven	45.30	33.48	14.72	6.50
New London	71.87	17.18	5.32	5.63
Tolland	54.90	24.53	11.26	9.31
Windham	77.91	15.17	1.53	5.39
State	55.05	25.70	10.32	8.93

As Table 12 shows, the percentage of business travelers is high in Fairfield, Hartford, and New Haven Counties. Pleasure travel is important to all areas of the State where it represents more than a third of all travel, except in Hartford County. Pleasure travelers visit primarily New London County (71.87%) and Windham County (77.91%). The two casinos play an important role in the number of pleasure travelers in New London County, as do Mystic Aquarium and Mystic Seaport. Business and convention travel is more important for large-scale establishments, while many pleasure travelers go to facilities with 1 to 20 rooms. (Table 13)

Table 13
Purpose of Trip of Visitors
to Hotels/Motels/Resorts
by HMR Rooms Size
Connecticut
1999

Number of Rooms	Purpose of Trip: Pleasure	Business	Convention/ Meeting	Other
1~20	71.40	12.97	6.32	9.31
21~100	46.84	31.79	10.36	11.00
100+	28.75	46.60	19.45	5.20

Table14
Number of Persons Occupying One Unit
and Average Length of Stay
Hotels/Motels/Resorts
Connecticut
1999

County	Number of Persons Occupying One Unit	Average Length of Stay(#of nights)
Fairfield	1.54	2.65
Hartford	2.03	2.54
Litchfield	1.84	2.00
Middlesex	2.20	2.63
New Haven	1.88	2.53
New London	1.83	2.24
Tolland	1.59	1.33
Windham	1.84	1.44
State	1.84	2.46

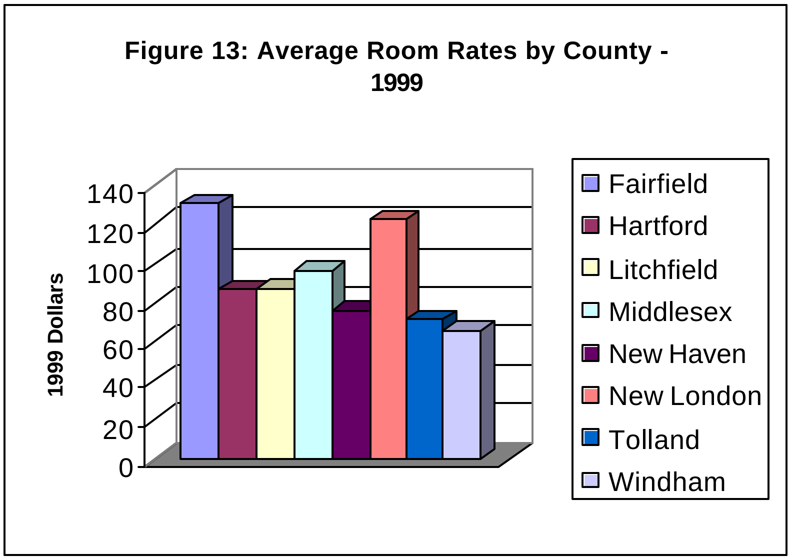


Table 15
Average Daily Room Rate by County
Connecticut
1999 Dollar

County	Minimum	Simple Average	Maximum	Average Weighted by Rooms
Fairfield	$50.00	$124.39	$400.00	$131.27
Hartford	$18.00	$73.89	$144.00	$86.84
Litchfield	$39.00	$105.45	$200.00	$87.39
Middlesex	$35.00	$97.90	$168.00	$96.02
New Haven	$46.00	$88.82	$150.00	$76.13
New London	$45.00	$111.00	$854.00	$122.54
Tolland	$45.00	$80.00	$123.00	$71.46
Windham	$35.00	$83.62	$120.00	$65.81
State	$18.00	$96.77	$854.00	$100.48

Table 14 shows the average number of persons occupying one HMR rooms is 1.84 across the State. The average length of stay is about two and a half days.

Room rates among the counties range widely from the lowest ($18) in Hartford County to the highest ($854) in New London County. Figure 13, Tables 15 and 16 present these room rates in more detail. When we look at this data we see that, on average, Fairfield County has the highest room rates in 1999 followed by New London and Litchfield Counties. Tolland and Windham Counties have the lowest average room rates in Connecticut. Another important observation gleaned from this data is that all counties have *some* low priced rooms available. In fact, it is possible to find accommodation in Hartford County for as low as $18, while the maximum room rate can go up to $854 in New London County.

Table 16
Average Room Rates by Tourism District
Connecticut
1999 Dollar

Tourism District		Simple Average	Weighted by Rooms
Coastal Fairfield		$149.25	$147.42
Waterbury Region		$83.83	$63.66
Greater New Haven		$87.61	$79.17
CT River Valley Shoreline		$98.09	$92.99
Southeastern CT		$111.13	$122.56
Litchfield Hills		$106.78	$87.84
Central CT		$63.00	$61.28
Greater Hartford		$78.59	$94.36
Northeast CT		$84.43	$67.93
Housatonic Valley		$95.78	$87.85
CT North Central		$61.20	$65.35
State Average		$96.77	$100.48

Tables 15 and 16 show the room rates as simple averages and as averages weighted by number of rooms in each establishment. Simple averages provide some useful information about the average prices and room price differences among the counties and tourism districts, but there are some problems associated with a simple average. It ignores the number of rooms available in each establishment and all establishments are weighted equally. Another way to look at the data is to weigh the room rates with the number of rooms available at each price level.

According to Table 15, the average room rate in the State weighted by the number of rooms available at each price level is $100.48 in 1999. Another observation is that some counties have proportionally more rooms available at higher prices, such as Fairfield, Hartford, and New London Counties.

In the survey, respondents also provided information about their weekend and weekday occupancy rates by season in 1999. Figure 14 and Table 17 present this information. As can be seen from the table, the weekend occupancy rate is very close to weekday occupancy rate in summer, while in winter, spring and fall, the weekday occupancy rate is higher than the weekend occupancy rate. Summer has the highest occupancy rates for almost all counties, except in Hartford, Windham and Litchfield Counties when autumn occupancy rates are higher than those for summer.

Table 18 gives monthly occupancy rates as the average occupancy rates for those establishments open each month.

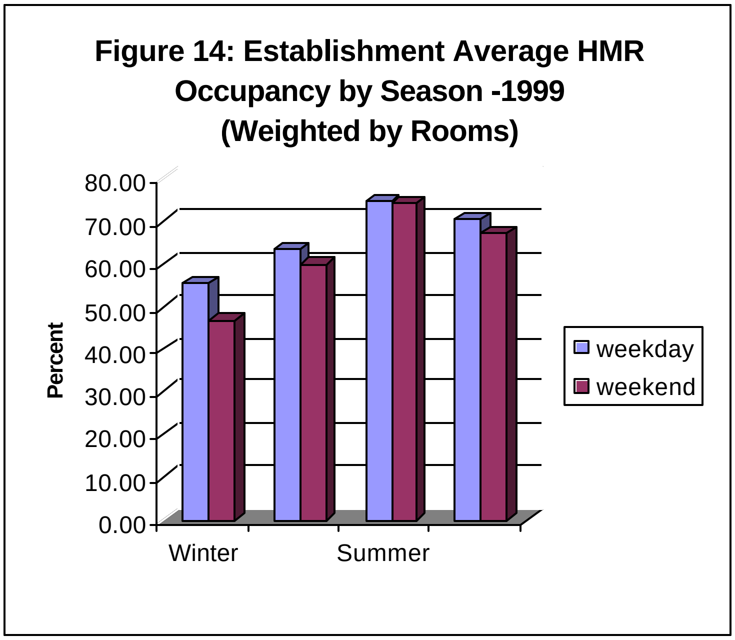


Table 17
Average Hotel/Motel/Resort Weekday and Weekend Occupancy Rates(Percentages) by Season and County
Weighted by Rooms 1999

	Weekday					Weekend				
County	Winter	Spring	Summer	Fall	Average	Winter	Spring	Summer	Fall	Average
Fairfield	72.57	78.70	83.96	83.56	79.70	37.01	52.31	61.05	59.42	52.45
Hartford	66.86	73.71	77.29	77.76	73.91	53.81	63.64	71.46	71.65	65.14
Litchfield	20.85	28.61	37.70	35.40	30.64	36.96	43.33	74.44	70.57	56.33
Middlesex	40.49	47.46	75.84	55.93	54.93	38.63	49.36	76.94	54.99	54.98
New Haven	56.88	65.43	75.23	70.97	67.13	51.91	65.56	79.87	70.73	67.02
New London	31.93	45.81	69.91	60.90	52.14	55.35	69.90	91.99	74.66	72.98
Tolland	56.94	49.68	52.02	53.74	53.10	19.07	52.20	64.21	54.60	47.52
Windham	29.51	30.51	41.91	45.50	36.86	35.48	47.21	55.77	62.84	50.33
State Average	55.72	63.41	74.65	70.46	66.06	47.06	59.97	74.35	67.22	62.15

Table 18
Average Hotel/Motel/Resort Occupancy Rates by County and by Month
1999 (Percentages)

County	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Fairfield	Simple Average	51	52	54	62	69	73	74	76	77	78	65	60	66
	Weighted by Rooms	52	55	54	58	63	68	69	75	72	74	62	53	63
Hartford	Simple Average	50	50	55	55	59	63	65	64	68	73	61	52	60
	Weighted by Rooms	57	61	65	58	61	71	71	71	73	76	65	55	65
Litchfield	Simple Average	30	30	26	36	50	54	60	58	61	62	40	39	46
	Weighted by Rooms	38	40	37	47	53	71	73	72	71	73	44	39	55
Middlesex	Simple Average	38	45	36	47	59	68	78	81	69	70	47	43	57
	Weighted by Rooms	50	58	53	61	61	72	77	82	69	74	62	55	64
New Haven	Simple Average	44	47	47	51	62	67	71	72	66	66	59	45	58
	Weighted by Rooms	53	59	58	62	71	74	78	80	75	74	64	51	67
New London	Simple Average	30	34	36	43	54	61	73	76	68	65	43	33	51
	Weighted by Rooms	42	43	50	56	67	70	84	85	78	71	54	44	62
Tolland	Simple Average	31	39	39	46	58	50	52	54	54	57	39	32	46
	Weighted by Rooms	45	48	49	59	65	68	70	76	72	72	58	47	61
Windham	Simple Average	15	16	13	25	35	36	41	42	46	62	27	19	31
	Weighted by Rooms	33	28	31	36	48	48	51	59	60	54	37	34	43
State	Simple Average	38	41	41	47	57	61	67	69	66	67	50	42	54
	Weighted by Rooms	51	55	56	58	64	71	74	77	73	74	61	51	64

The occupancy rates presented in Table 18 are both the simple averages and averages weighted by number of rooms of all responding establishments in the current survey. In the State, the months of May through October have higher occupancy rates. The average statewide occupancy rate from June to August is 74%. Middlesex County has the highest average occupancy rate for this period (77%), and Windham County has the lowest rate with 53%.

Table 19 reports the percentage of rooms open by county and month. According to this table, Connecticut has just a few seasonal facilities. Most of the seasonal properties are in Middlesex County, and 70% of all the properties in Middlesex are open all year long.

Table 19
Seasonality of Hotels/Motels/Resorts Percent of Rooms Open by County and Month
Connecticut
1999

County	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Open All Year
Fairfield	1999	92.60	92.60	92.60	96.30	96.30	96.30	96.30	96.30	96.30	96.30	100.00	100.00	92.60
Hartford	1999	94.10	94.10	94.10	98.00	98.00	98.00	98.00	98.00	98.00	96.10	96.10	92.20	88.20
Litchfield	1999	80.50	80.50	78.00	85.40	97.60	97.60	97.60	97.60	95.10	97.60	82.90	82.90	75.60
Middlesex	1999	70.00	73.30	76.70	90.00	93.30	100.00	96.70	96.70	100.00	90.00	80.00	80.00	70.00
New Haven	1999	95.20	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	97.60	97.60	95.20	92.90
New London	1999	91.70	93.30	91.70	91.70	93.30	93.30	93.30	96.70	98.30	96.70	96.70	96.70	91.70
Tolland	1999	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	93.30	93.30	93.30	93.30
Windham	1999	85.70	92.90	92.90	92.90	92.90	92.90	92.90	92.90	92.90	100.00	92.90	92.90	78.60
State	1999	88.90	91.10	90.70	94.30	96.80	97.10	96.80	97.50	98.20	96.10	93.20	92.10	86.10

Table 20 Out-of-State Use Rate of Hotels/Motels/Resorts by County Connecticut 1999		
County	Simple Averages	Averages Weighted by Rooms
Fairfield	76.20	80.71
Hartford	63.90	66.81
Litchfield	74.10	70.53
Middlesex	63.90	67.44
New Haven	74.40	75.07
New London	76.80	77.56
Tolland	66.90	51.76
Windham	72.00	85.41
State Average	71.60	73.36

Figure 15: Origin of Out-of-State HMR Visitors- 1999

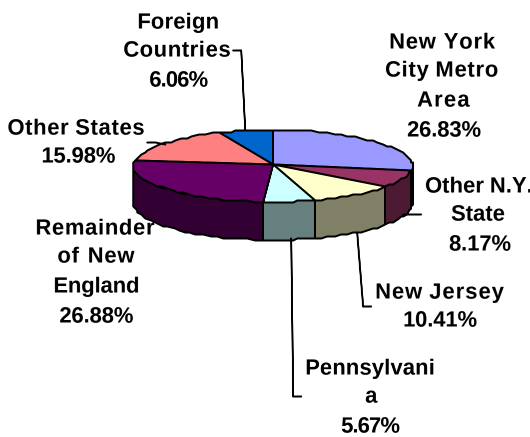


Table 21
Origin of Out-of-State Visitors to
Hotels, Motels and Resorts by County
Connecticut
1999 (percentages)

County	New York City Metro Area	Other N.Y. State	New Jersey	Pennsylvania	Remainder of New England	Other States	Foreign Countries
Fairfield	23.88	7.12	7.03	3.42	26.53	24.27	7.75
Hartford	16.69	28.23	6.06	5.12	28.23	9.59	6.08
Litchfield	36.93	8.38	10.80	3.92	20.98	12.87	6.12
Middlesex	31.27	8.67	14.36	4.35	28.30	10.55	2.50
New Haven	22.52	6.67	8.01	5.32	28.91	21.01	7.56
New London	29.94	9.75	12.45	6.25	26.03	11.34	4.25
Tolland	13.08	8.91	11.01	8.14	30.51	21.84	6.52
Windham	27.32	4.00	7.51	5.40	22.52	28.73	4.53
State	26.83	8.17	10.41	5.67	26.88	15.98	6.06

Connecticut has a large number of out-of-state visitors: 73.36% of all travelers in 1999 were reported as being from other states (Table 20). This data should be interpreted cautiously because it only represents the out-of-state visitors coming to those establishments responding to the survey. It is not the total number of out-of-state visitors coming into the state. Figure 15 and Table 21 show the origins of out-of-state tourists in different counties and in the state. When we consider New York City and the other parts of New York State together, it is clear that the largest proportion of Connecticut's visitors comes from New York State.

Connecticut Campground Profile

The Connecticut campground population in 1999 was 70, of which 15 are state-owned campgrounds, 55 are privately owned campgrounds. Thirty-six private campgrounds responded to the survey. Five of these campgrounds rent nearly all to short stay campers, 3 rent to seasonal campers, and 26 campgrounds rent to a mix of short stay (four weeks or less) and seasonal campers (Table 22).

Table 22
Campground Profile (of the Respondents of Survey)
Connecticut
1999

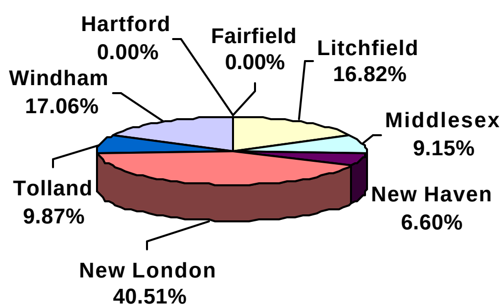
Type		Number		Percent
Privately Owned Campground				
	Nearly All Short Stay Campers	5		13.90
	Nearly All Campers Rent Seasonally	3		8.30
	Mix of Short Stay and Seasonal Campers	26		72.20
	Other	2		5.60
Total		36		100.00

Among the counties, New London has the largest number with 28 campgrounds and 3,867 campsites. The State as a whole has 70 campgrounds and 9,545 campsites. The counties of Fairfield and Hartford do not have campgrounds. Table 23 and Figure 16 show the distribution of campgrounds by county.

Table 23
Number of Establishments and Campsites by County
Connecticut
1999

County	Campgrounds: Number of Establishments	Campgrounds: Number of Campsites
Fairfield	0	0
Hartford	0	0
Litchfield	15	1605
Middlesex	6	873
New Haven	2	630
New London	28	3867
Tolland	5	942
Windham	14	1628
State Total	70	9545

Figure 16: Campsites by County
1999



Among the tourism districts, the Southeast Connecticut tourism district has the greatest number of campgrounds (Table 24). Table 25 presents the distribution of campgrounds by size and by tourism district. About half of the campgrounds have more than 100 sites.

Table 24
Number of Campgrounds and Number of Sites by Tourism District
Connecticut
1999

Tourism District	Number of Campgrounds	Number of Sites
Greater Fairfield	0	0
Waterbury	2	146
Greater New Haven	0	0
Connecticut Valley	7	1431
Southeastern Connecticut	27	3764
Litchfield Hills	14	1531
Central Connecticut	0	0
Greater Hartford	1	122
Northeast Connecticut	17	2001
Housatonic Valley	0	0
Connecticut North Central	2	550
State Total	70	9545

Table 25 Distribution of Campgrounds by Size and Tourism District Connecticut 1999						
		Number of Campgrounds by Scale(# of Sites)				
Tourism District	Number of Campground	1-25	26-50	51-100	101-200	200+
Coastal Fairfield County	0	0	0	0	0	0
Waterbury Region	2	0	1	1	0	0
Greater New Haven	0	0	0	0	0	0
CT River Valley Shoreline	7	2	1	1	0	3
Southeastern CT	27	4	3	4	10	6
Litchfield Hills	14	0	5	5	2	2
Central CT	0	0	0	0	0	0
Greater Hartford	1	0	0	0	1	0
Northeast CT	17	2	3	4	7	1
Housatonic Valley	0	0	0	0	0	0
CT North Central	2	0	0	0	1	1
State Total	70	8	13	15	21	13

Table 26 shows the distribution of campgrounds by city or town. Among them, Voluntown and Litchfield rank first with three campgrounds each. All other towns have one or two campgrounds.

Table 27 shows the facilities that campgrounds offer. The most common facilities are a laundry (92.73%), a recreational hall (83.64%), and, a swimming pool (83.64%). At least sixty percent of the campgrounds have the listed facility.

Table 26 Number of Campground by City/Town Connecticut 1999		
City	Number	Percent of Total Campgrounds
Ashford	1	1.43
Baltic	1	1.43
Bozrah	2	2.86
Chaplin	1	1.43
Clinton	1	1.43
East Canaan	1	1.43
East Haddam	2	2.86
East Hampton	2	2.86
East Killingly	2	2.86
East Lyme	2	2.86
Eastford	3	4.29
Goshen	2	2.86
Groton	1	1.43
Higganum	1	1.43
Jewett City	2	2.86
Kent	2	2.86
Lebanon	2	2.86
Lisbon	2	2.86
Litchfleld	3	4.29
Madison	1	1.43
Niantic	2	2.86
North Grosvenordale	1	1.43
North Stonington	2	2.86
Oakdale	2	2.86
Old Mystic	1	1.43
Oneco	1	1.43
Pleasant Valley	1	1.43
Plymouth	1	1.43
Pomfret Center	1	1.43
Preston	2	2.86
Salem	2	2.86
Scotland	1	1.43
Southbury	1	1.43
Stafford Springs	2	2.86
Sterling	1	1.43
Thomaston	2	2.86
Tolland	1	1.43
Torrington	1	1.43
Voluntown	5	7.14
Warren	1	1.43
Willington	2	2.86
Winsted	1	1.43
Woodstock	2	2.86
Total	70	100.00

Table 27 Percent of Campgrounds Providing Selected Facilities Connecitcut 1999		
Facilities	**Count**	**Percent**
Sewer Hookups	33	60.00
Safari Area	34	61.82
Store	42	76.36
Recreation Hall	46	83.64
Swimming	46	83.64
Fishing	42	76.36
Hiking	39	70.91
Laundry Facilities	51	92.73

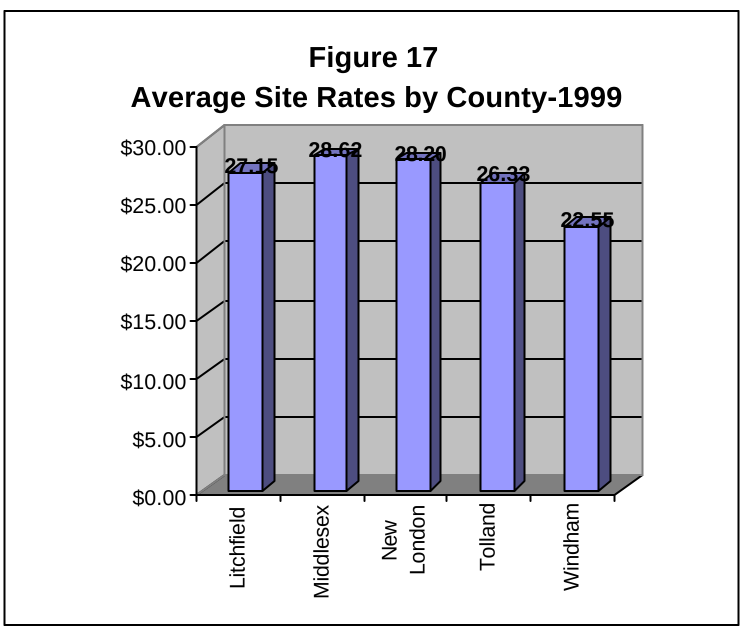
Table28 Average Size of a Camping Party and Average Length of Stay Campgrounds Connecticut 1999		
County	**Average Size of a Camping Party**	**Average Length of Stay(#of days)**
Fairfield	N/A	N/A
Hartford	N/A	N/A
Litchfield	3.70	3.20
Middlesex	4.10	3.81
New Haven	N/A	N/A
New London	3.86	3.87
Tolland	4.77	4.76
Windham	3.91	2.45
State	3.94	3.65

Table 29 Average Daily Campsite Rate by County Connecticut (Weighted by Number of Sites) 1999 Dollar			
	Site Rate		
County	Low	Average	High
Fairfield	N/A	N/A	N/A
Hartford	N/A	N/A	N/A
Litchfield	23.00	27.15	30.00
Middlesex	26.00	28.62	40.00
New Haven	N/A	N/A	N/A
New London	20.00	28.20	35.00
Tolland	25.00	26.33	27.00
Windham	10.00	22.55	30.00
State Total	10.00	27.41	40.00

The average size of a camping party is close to four people. Table 28 shows the average length of stay is about three and a half days. The weighted average campsite rental rate in 1999 was $27.41 per day. Daily site rates range from $10.00 to $40.00. The average site rate in Windham is the lowest among the counties, with an average of $22.55 (Table 29).

Table 30 shows that, among the tourism districts, CT River Valley Shoreline has the highest site rate ($28.62), while Northeast CT has the lowest site rate ($22.50).

Table 30 Average Daily Campground Site Rate in Current Dollars by Tourism District 1999 Dollar (Weighted by Number of Sites)			
	Site Rate		
Tourism District	Low	Average	High
Coastal Fairfield County	N/A	N/A	N/A
Waterbury Region	N/A	N/A	N/A
Greater New Haven	N/A	N/A	N/A
CT River Valley Shoreline	26.00	28.62	40.00
Southeastern CT	20.00	28.45	35.00
Litchfield Hills	23.00	27.15	30.00
Central CT	N/A	N/A	N/A
Greater Hartford	25.00	25.00	25.00
Northeast CT	10.00	22.50	30.00
Housatonic Valley	N/A	N/A	N/A
CT North Central	27.00	23.07	27.00
State Total	10.00	27.41	40.00



The average annual occupancy rate is 51.03%. This rate is calculated from the occupancy rate from April to October only, because during the winter a large proportion of campgrounds is closed (Table 31).

Table 32 and Figure 18 show the seasonal and weekday/weekend occupancy rates. Summer is the peak season, with an occupancy rate of 80.86% on weekends and 56.66 % on weekdays. The weekend occupancy rate is significantly higher than the weekday occupancy rate in all seasons except in winter.

Table 31
Average Annual Occupancy in Campgrounds by County (Weighted by Number of Sites)
Connecticut
1999

County	Occupancy Rate
Fairfield	NA
Hartford	NA
Litchfield	61.03
Middlesex	65.52
New Haven	NA
New London	51.00
Tolland	53.74
Windham	46.74
State Total	51.03

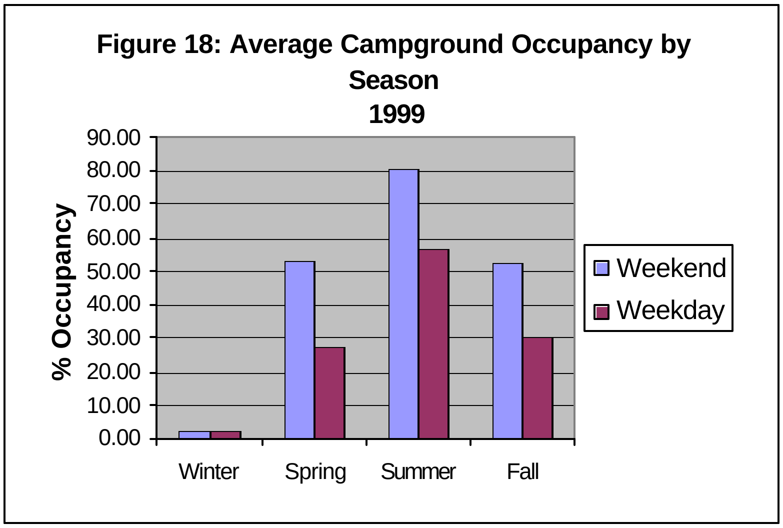


Table 32 Average Weekday and Weekend Occupancy Rates in Campgrounds Connecticut (Weighted by Number of Sites) 1999		
Weekend		**Percent**
	Winter	2.63
	Spring	53.25
	Summer	80.86
	Fall	52.33
Weekday		**Percent**
	Winter	2.68
	Spring	27.28
	Summer	56.66

Table 33 shows the percentage of sites open by month. The figures show that from June to September the campgrounds are fully open (100%). The half-year from April to October is the normal business period; during the rest of the year the campgrounds are mostly closed.

The survey asked respondents to estimate the distribution of campground visitors' origins. On average, about 38% of all visitors are out-of-state visitors. Among out-of-state visitors, nearly 49% are from New England. About 19% of the out-of-state visitors are from the New York Metropolitan Area. Table 34 and Figure 19 show the distribution of visitors' origins.

Table 33
Seasonality of Campgrounds
Percent of Sites Open
by County and by Month
Connecticut

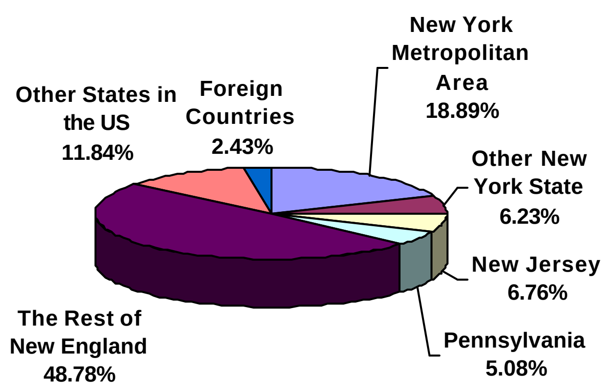
County	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Open all year
Fairfield	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Hartford	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Litchfield	0.00	0.00	0.00	75.00	100.00	75.00	75.00	75.00	75.00	100.00	0.00	0.00	0.00
Middlesex	0.00	0.00	0.00	66.67	100.00	100.00	100.00	100.00	100.00	100.00	33.33	33.33	0.00
New Haven	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
New London	10.53	10.53	10.53	57.89	94.74	89.47	89.47	89.47	89.47	94.74	15.79	10.53	12.50
Tolland	0.00	0.00	0.00	100.00	66.67	66.67	66.67	66.67	66.67	100.00	0.00	0.00	0.00
Windham	0.00	0.00	0.00	42.86	85.71	85.71	85.71	85.71	85.71	71.43	0.00	0.00	0.00
State Total	5.55	5.55	5.55	61.11	91.67	86.11	86.11	86.11	86.11	91.67	11.11	8.33	7.14

Table 34
Out-of-State Guest Parties
at Campgrounds
Connecticut
1999

Origin of Out-of-State Guest Parties

Origin	Percentage
New York Metropolitan Area	18.89
Other New York State	6.23
New Jersey	6.76
Pennsylvania	5.08
The Rest of New England	48.78
Other States in the US	11.84
Foreign Countries	2.43
Total	100.00

Figure 19: Origin of Out-of-State Campers-1999



Appendix A

Tourism Related Industries and SIC Codes

Table A-1: Tourism-Related Industries and SIC codes

Industry	SIC
Railroad Transportation	40
Local and Interurban Passenger Transit	4100
Local and Suburban Transportation	4110
Taxicabs	4120
Intercity and Rural Bus Transportation	4130
Bus Charter Services	4140
Air Transportation	45
Air Transportation Scheduled	4510
Air Transportation Nonscheduled	4520
Airports, Flying Fields, and Airport Terminal Services	4580
Water Transportation	4400
Deep Sea Foreign Transportation of Fright	4410
Deep Sea Domestic Transportation of Fright	4420
Freight Transportation on the Great Lakes	4430
Water Transportation of Freight NEC	4440
Sightseeing & Excursion Boat	4459
Boat, Liveries, Yacht Basins	4469
Water Transportation of Passengers	4480
Marinas	4493
Transportation Services	47
Passenger Transportation Arrangement	4720
Travel Agencies	4724
Tour Operators	4725
Passenger Transport Arrangement, NEC	4729
Hotels and Other Lodging Places	7000
Hotels and Motels	7010
Rooming and Boarding Houses	7020
Camps and recreational Vehicle Parks	7030
Amusement and Recreation Services	7900
Dance Studios, Schools and Halls	7910
Producers, Orchestras, Entertainers	7920
Theatrical Producers and Services	7922
Entertainers and Entertainment Groups	7929
Bowling Centers	7930
Commercial Sports	7940
Racing Including Track Operation	7948
Misc. Amusement Recreation Services	7990
Physical Fitness Facilities	7991
Public Golf Courses	7992
Coin-Operated Amusement Devices	7993
Amusement Parks	7996
Membership Sports and Recreation Clubs	7997
Amusement and Recreation, NEC	7999
Libraries	8230

Table A-1 continued: Tourism-Related Industries and SIC codes	
Industry	**SIC**
Museums, Botanical, Zoological Gardens	8400
Museums and Art Galleries	8410
Botanical and Zoological Gardens	8420
Automotive Rental, No Drivers	7510
Rtrack Rental and Leasing	7513
Passenger Car Rental	7514
Passenger Car Leasing	7515
Utility Trailer Rental	7519
Automobile Parking	7520
Automotive Repair Shops	7530
Automotive Services, Except Repair	7540
Motion Pictures	7800
Motion Picture Theaters	7830
Retail	52
General Merchandise Stores	53
Automotive Dealers And Service Stations	55
Gasoline Service Stations	5540
Eating and Drinking Places	58
Miscellaneous Retail	59
Gift, Novelty, And Souvenir Shops	5947

Appendix B

REMI Baseline Forecast 1999

Table B-1
REMI Baseline Economy Forecast for 1999
Connecticut

Variables	Private Non-Farm	GRP (Bil 92$)	Real Disp Pers Inc (Bil 92$)	Population (Thous)	Pers Inc (Bil Nom $)	Disp Pers Inc	Econ Migrants	Real Disp Pers Inc per Cap (Thous 92$)	State & Local	Employment (Thous)	PCE-Price Index 92$
Fairfield	507.101	32.536	26.007	843.252	45.139	36.267	-1.032	30.841	1.964	552.515	139.5
Hartford	539.837	32.449	19.037	824.386	29.759	23.879	-5.547	23.092	3.018	611.634	125.4
Litchfield	84.279	4.463	4.298	183	6.085	4.887	0.359	23.488	0.387	93.77	113.7
New Haven	423.27	24.169	17.723	792.583	26.664	21.396	-4.019	22.361	2.052	473.589	120.7
Middlesex	77.494	4.198	3.542	149.91	5.088	4.085	-0.058	23.628	0.447	87.804	115.3
New London	132.673	7.869	5.044	252.291	7.681	6.168	0.469	19.994	0.706	162.975	122.3
Tolland	40.571	2.349	2.833	131.259	3.82	3.066	-0.529	21.584	0.658	54.75	108.2
Windham	40.878	2.32	1.998	106.4	2.706	2.173	0.097	18.781	0.324	48.453	108.7
Connecticut	1846.102	110.354	80.483	3283.081	126.942	101.919	-10.259	24.515	9.555	2085.491	127.1

CCEA

Appendix C

1999-2000 Survey of Connecticut Hotels, Motels and Resorts

TOURISM SURVEY
Hotels/Motels/Resorts
06/02/00

INTRO: May I please speak with ___________________? Hello, my name is _______________and I am calling from the University of Connecticut. We are conducting a survey of hotel, motel, and resort owners for the Connecticut Office of Tourism. You should have received a letter from the State announcing this call. This survey will take approximately ____ minutes.

Q1. In which town is your facility located?

_________________.

9. DK/Refused

Q2. Which category best describes your business...Is it a Hotel; a Resort Hotel; a Resort with Cottages and Cabins; a Motor Hotel; a Bed and Breakfast, a Hotel with Cottages; Condos or Apartments; a Guest House, an Inn or Tourist Court; or is it something else?

1. Hotel [Skip to Q2a.]
2. Resort Hotel [Skip to Q2a.]
3. Resort (Cottages and Cabins) [Skip to Q2c.]
4. Motor Hotel [Skip to Q2a.]
5. Bed and Breakfast [Skip to Q2a.]
6. Hotel and Cottages [Skip to Q2c.]
7. Condos or Apartments [Skip to Q2c.]
8. Guest House, Inn, or Tourist Court [Skip to Q2a.]
9. Something else __________________. [Skip to Q2a.]
99. DK/Refused [Skip to Q3.]

(If Hotel, Motel, Inn, or Bed and Breakfast)

Q2a. How many rooms were available in your facility during 1999?

______________. [Skip to Q3.]

(If Cabin, Cottage, Condo, or Apartment)

Q2c. How many single-party units were available in your facility during 1999?

____________.

Q3. What was the **average** number of persons per night occupying one room or unit in 1999? _________.

Q4. About what percent of your total business in 1999 came from guests who live in the state of Connecticut?
______________%. (If 100%, skip to Q6)

Q5. For your **out-of-state** guest parties in 1999, what percentage would you say came from each of the following areas: First,

Q5a. Other New England States (Maine, New Hampshire, Vermont, Massachusetts, Rhode Island)? _____________ %.

Q5b. The New York Metropolitan Area, including New York City, Long Island, and Westchester? _________ %.

Q5c. New York State, NOT including New York City Metro Area? _______%.

Q5d. New Jersey? ____________ %.

Q5e. Pennsylvania? _____________ %.

Q5f. Any Other State? __________ %.

Q5g. Foreign Countries including Canada and Mexico? _____________ %.

Q6. What months were you open for business in 1999? ____________________.

The next few questions have to do with the occupancy for 1999.

Q7. Now I would like to ask you about occupancy during specific months in 1999. What was the average percentage occupancy of your rooms or units in…

Q7a. January1999? ___________ %.

Q7b. February 1999? ___________ %.

Q7c. March 1999? ___________ %.

Q7d. April 1999? ___________ %.

Q7e. May 1999? ___________ %.

Q7f. June 1999? ___________ %.

Q7g. July 1999? ___________ %.

Q7h. August 1999? ___________ %.

Q7i. September 1999? ___________ %.

Q7j. October 1999? __________ %.

Q7k. November 1999? __________ %.

Q7l. December 1999? __________ %.

Q8. For each of the seasons, please tell me what the average capacity on weekends was?

Q6a. Weekends in Winter: _________%
Q6b. Weekends in Spring: _________%
Q6c. Weekends in Summer: _________%
Q6d. Weekends in Autumn: _________%
Now please tell me what the average capacity on weekdays was?
Q6a. Weekdays in Winter: _________%
Q6b. Weekdays in Spring: _________%
Q6c. Weekdays in Summer: _________%
Q6d. Weekdays in Autumn: _________%

Q9. Approximately what was the **average** number of nights your guests stayed in your facility in 1999? ______________.

The next few questions have to do with your total sales for 1999.

Q12. Approximately what were your total sales for the First Quarter of 1999?
$_______________.

Q12a. What percent of that is accounted for by room rentals? _________%

Q13. Approximately what were your total sales for the Second Quarter of 1999?
$________________.
Q13a. What percent of that is accounted for by room rentals? _________%

Q14. For the Third Quarter 1999?
$_________________.
Q14a. What percent of that is accounted for by room rentals? _________%

Q15. And for the Fourth Quarter 1999?
$_________________.
Q15a. What percent of that is accounted for by room rentals? _________%

Q16. As a percentage of all your spending, about what percent of your purchases were made within the state in 1999?
___________________%.

Q17. In dollar terms, about how much money did you spend on purchases in the state in 1999?
$___________________.

Q18a. How many full-time employees does your business employ in the state of Connecticut? ______________

Q18a. How many part-time and seasonal employees does your business employ in the state of Connecticut? _____________

RESPONSES TO QUESTIONS 19a. - 19d. should add to 100%

Q19. Approximately, what percentage of your rooms rentals were accounted for by
(a) people on vacation or leisure trips ___________ %
(b) conventions or meetings ___________ %
(c) business other than conventions and meetings? _____________%
(d) something other than the categories previously mentioned? ___________%

Q20. What was your average room rate per night, including state taxes, in 1999?
$________

Q21. What percent of rooms were rented to members of tour groups? _________%

Appendix D

1999-2000 Connecticut Campgrounds Survey

TOURISM STUDY

CAMPGROUNDS

06/02/00

INTRO: May I please speak with ___________________? Hello, my name is ________________and I am calling from the University of Connecticut. We are conducting a survey of campground owners for the Connecticut Office of Tourism. You should have received a letter from the State announcing this call.

Q1. In what town is your campground physically located?

_______________________.

Q2. Which **one** of the following categories **best** describes your camping operations?

1. A privately owned campground, nearly all short-stay campers (4 weeks or less)
2. A privately owned campground, nearly all campers rent seasonally (more than 4 weeks)
3. A privately owned campground, mix of short stay and seasonal campers
4. A State Park/State Forest campground
5. Another publicly owned campground
6. A campground in which sites are rented or leased semi-permanently
7. A campground for special groups (e.g. church, YMCA, youth groups, etc)
8. A campground for people living in mobile homes
9. A campground for other non-transient residents

Q3. How many total campsites did you have open for use in 1999?

_______________ sites.

Q3a. Did your campground have any sites open for transient (4 week or less) camping parties in 1999?

1. Yes
2. No (terminate)
3. DK/refused

The rest of the questions in this survey pertain only to short-term campers, those staying four weeks or less.

Q5. What was the **average** size of a camping party (number of persons per night) using a single campsite in 1999?

_______________________ persons.

Q7. About what percentage of your total business in 1999 came from campers who live in the state of Connecticut?

___________________% (If 100%, skip to Q9)

Q8. Thinking about your out-of-state camping parties in 1999, about what percent of these campers came from the following areas?

Q8a. Other New England States (Maine, New Hampshire, Vermont, Massachusetts, Rhode Island)? _____________ %.

Q8b. The New York Metropolitan Area, including New York City, Long Island, and Westchester? _________ %.

Q8c. New York State, NOT including New York City Metro Area? _________ %.

Q8d. New Jersey? ____________ %.

Q8e. Pennsylvania? _____________ %.

Q8f. All Other States within the USA? __________ %.

Q8g. Foreign Countries including Canada and Mexico? _____________ %.

Q9. What months were you open for business in 1999? ___________________.

Q10. Now I would like to ask you about occupancy rates during specific months in 1999. What was the average percentage occupancy rate of your campsites in…

Q10a. January 1999 _______________%
Q10b. February 1999 _______________%
Q10c. March 1999 _______________%
Q10d. April 1999 _______________%
Q10e. May 1999 _______________%
Q10f. June 1999 _______________%
Q10g. July 1999 _______________%
Q10h. August 1999 _______________%
Q10i. September 1999 _______________%
Q10j. October 1999 _______________%
Q10h. November 1999 _______________%
Q10h. December 1999 _______________%

Q6. For each of the seasons, please tell me what the average capacity on weekends was?

Q6a. Weekends in Winter: _________%
Q6b. Weekends in Spring: _________%
Q6c. Weekends in Summer: _________%
Q6d. Weekends in Autumn: _________%

Now please tell me what the average capacity on WEEKDAYS?

Q6a. Weekdays in Winter: _________%
Q6b. Weekdays in Spring: _________%
Q6c. Weekdays in Summer: _________%
Q6d. Weekdays in Autumn: _________%

Q11. Approximately what was the average length of stay (number of nights) of a typical camping party in 1999?

___________________ nights.

The next few questions have to do with your total sales for the year 1999.

Q12. Approximately what were your total sales for the First Quarter of 1999?

$________________.

Q12a. What percent of this is accounted for in campsite rental?

Q13. Approximately what were your total sales for the Second Quarter of 1999?

$_________________.

Q13a. What percent of this is accounted for in campsite rental? _________

Q14. For the Third Quarter 1999?

$__________________.

Q14a. What percent of this is accounted for in campsite rental? _________

Q15. And for the Fourth Quarter 1999?

$__________________.

Q15a. What percent of this is accounted for in campsite rental? _________

Q16. As a percentage of all your spending, about what percent of your purchases were made within the state in 1999?

___________________%.

Q17. In dollar terms, about how much money did you spend on purchases in the state in 1999?

$___________________.

Q18a. How many full-time employees does your business employ in the state of Connecticut? ______________

Q18a. How many part-time and seasonal employees does your business employ in the state of Connecticut? _____________

THE RESPONSES TO QUESTIONS 19a. - 19d. SHOULD TOTAL 100%

Q19. Approximately, what percentage of your campsites were accounted for by

(a) people on vacation or leisure trips ___________ %

(b) conventions or meetings ___________ %

(c) business other than conventions or meetings? _____________%

(d) something other than the categories listed above? ____________?

Q20. What was your average campsite rate per night, including taxes, in 1999?
$________

Q21. What percent of your campers were members of groups (for example, family reunions)? _________%

Appendix E

Travel Expenditure Pattern by County

Connecticut

1999

Table E-1
Traveler Expenditure Patterns
by Expenditure Category and Accommodation Used
(1999 $ million)
Fairfield County , Connecticut
1999

Expenditure Category	Hotel/Motel /Resort	Campground	Friends or Relatives	Day Trips	Pass Through	Other	Total
Lodging	214.73	0.00	0.00	0.00	0.00	8.45	223.18
Food/Restaurant	141.53	0.00	129.22	33.85	186.49	9.70	500.79
Recreation	55.51	0.00	47.50	27.76	0.00	7.81	138.58
Gasoline	18.91	0.00	32.20	7.22	39.83	7.89	106.06
Other Auto	29.28	0.00	12.48	12.35	0.00	0.00	54.11
Local Transportation	10.98	0.00	2.82	0.48	0.00	0.00	14.28
Retail and Other	139.09	0.00	178.33	78.77	0.00	6.40	402.60
County Total	610.03	0.00	402.56	160.44	226.32	40.26	1439.61

Table E-2
Traveler Expenditure Patterns
by Expenditure Category and Accommodation Used
(1999 $ million)
Hartford County , Connecticut
1999

Expenditure Category	Hotel/Motel/ Resort	Campground	Friends or Relatives	Day Trips	Pass Through	Other	Total
Lodging	151.10	0.00	0.00	0.00	0.00	5.95	157.05
Food/Restaurant	99.59	0.00	133.65	23.82	131.23	6.83	395.11
Recreation	39.06	0.00	49.13	19.53	0.00	5.50	113.22
Gasoline	13.31	0.00	33.31	5.08	28.03	5.55	85.28
Other Auto	20.60	0.00	12.91	8.69	0.00	0.00	42.20
Local Transportation	7.73	0.00	2.91	0.34	0.00	0.00	10.98
Retail and Other	97.87	0.00	184.44	55.43	0.00	4.50	342.25
County Total	429.26	0.00	416.35	112.89	159.25	28.33	1146.09

Table E-3
Traveler Expenditure Patterns
by Expenditure Category and Accommodation Used
(1999 $ million)
Litchfield County , Connecticut
1999

Expenditure Category	Hotel/Motel/ Resort	Campground	Friends or Relatives	Day Trips	Pass Through	Other	Total
Lodging	14.36	3.86	0.00	0.00	0.00	0.57	18.79
Food/Restaurant	9.46	14.55	27.83	2.26	12.47	0.65	67.23
Recreation	3.71	9.70	10.23	1.86	0.00	0.52	26.02
Gasoline	1.26	2.84	6.94	0.48	2.66	0.53	14.71
Other Auto	1.96	2.26	2.69	0.83	0.00	0.00	7.73
Local Transportation	0.73	0.00	0.61	0.03	0.00	0.00	1.37
Retail and Other	9.30	7.89	38.41	5.27	0.00	0.43	61.30
County Total	40.80	41.11	86.69	10.73	15.14	2.69	197.16

Table E-4
Traveler Expenditure Patterns
by Expenditure Category and Accommodation Used
(1999 $ million)
Middlesex County , Connecticut
1999

Expenditure Category	Hotel/Motel /Resort	Campground	Friends or Relatives	Day Trips	Pass Through	Other	Total
Lodging	36.71	4.99	0.00	0.00	0.00	1.45	43.14
Food/Restaurant	24.20	18.78	22.26	5.79	31.88	1.66	104.57
Recreation	9.49	12.52	8.18	4.75	0.00	1.34	36.27
Gasoline	3.23	3.66	5.55	1.23	6.81	1.35	21.83
Other Auto	5.01	2.92	2.15	2.11	0.00	0.00	12.19
Local Transportation	1.88	0.00	0.49	0.08	0.00	0.00	2.45
Retail and Other	23.78	10.18	30.73	13.47	0.00	1.09	79.25
County Total	104.29	53.04	69.36	27.43	38.69	6.88	299.70

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Table E-5
Traveler Expenditure Patterns
by Expenditure Category and Accommodation Used
(1999 $ million)
New Haven County , Connecticut
1999

Expenditure Category	Hotel/Motel/ Resort	Campground	Friends or Relatives	Day Trips	Pass Through	Other	Total
Lodging	104.72	0.59	0.00	0.00	0.00	4.12	109.43
Food/Restaurant	69.02	2.21	125.04	16.51	90.95	4.73	308.46
Recreation	27.07	1.47	45.97	13.54	0.00	3.81	91.86
Gasoline	9.22	0.43	31.16	3.52	19.43	3.85	67.61
Other Auto	14.28	0.34	12.08	6.02	0.00	0.00	32.72
Local Transportation	5.36	0.00	2.73	0.23	0.00	0.00	8.32
Retail and Other	67.83	1.20	172.57	38.42	0.00	3.12	283.13
County Total	297.50	6.25	389.54	78.24	110.37	19.64	901.53

Table E-6
Traveler Expenditure Patterns
by Expenditure Category and Accommodation Used
(1999 $ million)
New London County , Connecticut
1999

Expenditure Category	Hotel/Motel/ Resort	Campground	Friends or Relatives	Day Trips	Pass Through	Other	Total
Lodging	107.00	11.19	0.00	0.00	0.00	4.21	122.40
Food/Restaurant	70.52	42.13	40.07	16.87	92.93	4.84	267.35
Recreation	27.66	28.09	14.73	13.83	0.00	3.89	88.20
Gasoline	9.42	8.21	9.99	3.60	19.85	3.93	55.00
Other Auto	14.59	6.55	3.87	6.16	0.00	0.00	31.16
Local Transportation	5.47	0.00	0.87	0.24	0.00	0.00	6.59
Retail and Other	69.31	22.85	55.30	39.25	0.00	3.19	189.90
County Total	303.98	119.01	124.83	79.95	112.78	20.06	760.60

Table E-7
Traveler Expenditure Patterns
by Expenditure Category and Accommodation Used
(1999 $ million)
Tolland County , Connecticut
1999

Expenditure Category	Hotel/Motel /Resort	Campground	Friends or Relatives	Day Trips	Pass Through	Other	Total
Lodging	8.90	1.49	0.00	0.00	0.00	0.35	10.74
Food/Restaurant	5.87	5.62	18.15	1.40	7.73	0.40	39.17
Recreation	2.30	3.74	6.67	1.15	0.00	0.32	14.19
Gasoline	0.78	1.09	4.52	0.30	1.65	0.33	8.68
Other Auto	1.21	0.87	1.75	0.51	0.00	0.00	4.35
Local Transportation	0.46	0.00	0.40	0.02	0.00	0.00	0.87
Retail and Other	5.76	3.05	25.05	3.27	0.00	0.27	37.39
County Total	25.28	15.87	56.55	6.65	9.38	1.67	115.40

Table E-8
Traveler Expenditure Patterns
by Expenditure Category and Accommodation Used
(1999 $ million)
Windham County , Connecticut
1999

Expenditure Category	Hotel/Motel /Resort	Campground	Friends or Relatives	Day Trips	Pass Through	Other	Total
Lodging	2.16	3.20	0.00	0.00	0.00	0.09	5.45
Food/Restaurant	1.42	12.07	15.32	0.34	1.88	0.10	31.12
Recreation	0.56	8.04	5.63	0.28	0.00	0.08	14.59
Gasoline	0.19	2.35	3.82	0.07	0.40	0.08	6.91
Other Auto	0.29	1.87	1.48	0.12	0.00	0.00	3.77
Local Transportation	0.11	0.00	0.33	0.00	0.00	0.00	0.45
Retail and Other	1.40	6.54	21.14	0.79	0.00	0.06	29.94
County Total	6.14	34.08	47.73	1.61	2.28	0.41	92.24

Appendix F

Estimation Proportion of Expenditure Patterns by County

1999

Table F-1
Estimated Proportions (%)
Traveler Expenditure Patterns
by Expenditure Category and Accommodation Used
1999

Expenditure Category	Hotel/Motel/ Resort	Campground	Friends or Relatives	Day Trips	Pass Through	Other
Lodging	**35.2 (from survey)**	**9.4(from survey)**	0.0	0.0	0.0	21.0
Food/Restaurant	23.2	35.4	32.1	21.1	82.4	24.1
Recreation	9.1	23.6	11.8	17.3	0.0	19.4
Gasoline	3.1	6.9	8.0	4.5	17.6	19.6
Other Auto	4.8	5.5	3.1	7.7	0.0	0.0
Local Transportation	1.8	0.0	0.7	0.3	0.0	0.0
Retail and Other	22.8	19.2	44.3	49.1	0.0	15.9
County Total	100.0	100.0	(100)projected on basis of households distribution	(100)Projected as 21.3% of HMR county total expenditure	(100)projected as 37.1% of HMR county total expenditure	(100)projected as 6.6% of HMR county total expenditure

Note: We obtained HMR and Campground Lodging expenditures from the surveys. We projected other expenditure categories for each type of accomodation using the proportions given in this table. The numbers in the cells give the percentages that the specific expenditure category accounts for in the County total expenditure for each accommodation type, which are shown as 100% in the last row.

Appendix G

Number of Households by County and State

Table G-1
Number of Households
by County and State
Connecticut
1990 Census

County	Number	Percent
Fairfield	305,011	24.8
Hartford	324,691	26.4
Litchfield	66,371	5.4
Middlesex	54,651	4.4
New Haven	304,730	24.8
New London	93,245	7.6
Tolland	44,309	3.6
Windham	37,471	3
State Total	1,230,479	100

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Appendix H

Definition of Terms

(Quoted from the Economic Impact Study of the Connecticut Travel and Tourism Industry, Center for Survey and Marketing Research, Jan. 1995)

Economic Impacts:

Expenditures –

All of the money actually spent by travelers in a designated area—state, county or region.

Direct impacts –

The state and local taxes, jobs and incomes directly supported by traveler expenditures—sales taxes, rooms taxes, specialty taxes, hotel clerks, retail store sales people, owners/, managers and their wages/salaries/tips, etc.

Indirect impacts –

The state and local taxes, jobs and incomes supported by the purchases/payments of organizations directly serving the traveler – bakeries, banks, construction companies, utilities, insurance companies, etc. These are located within the designated area, e.g., a county, but the purchases/payments may be by other organizations in the state but outside the particular county, e.g., a New London hotel buys towels from a wholesaler in Hartford.

Regional Purchase Coefficient (RPC) –

The fraction of input required from Connecticut suppliers and labor to produce a unit of output.

Expenditure Categories:

Lodging –-

Payments to hotels, motels, resorts and campgrounds for overnight accommodation.

Food/restaurant –

Purchases of prepared foods and served beverages in eat-in or carry-out restaurants.

Recreation –

Entrance/admission fees, equipment rentals, greens fees, cover charges, conference registration fees (if at site), hunting /fishing licenses.

Gasoline –

Gas and oil.

Other auto –

Repairs, parts, rental fees, other service, parking.

Local transportation –

In-state payments for train, taxi, bus, limousine, subway, etc.

Retail and other –

Groceries, liquor/beer, gifts, souvenirs, drugs, cosmetics,

clothing, sporting goods, etc. – and anything that doesn't fit in other categories.

Purpose of trip:

Business –

Travel directly connected with occupation.

Conference/meeting—

Attendance at any pre-organized group activity, whether or not connected with occupation.

Pleasure –

Recreation, cultural activities/events, spectator sports, package tours, shopping and other discretionary activities undertaken primarily for enjoyment or self satisfaction.

Other –

Personal business, family emergency, etc.

Party –

Those persons traveling together as friends, family members, business associates on a particular trip.

Tourist/traveler:

Any person traveling outside of their normal areas of day-to-day activity except public transportation crews, military travel, or traveling to and from school. Thus , a delivery route driver would not fit, but a sales representative on a business trip would.

Appendix I

Detailed REMI Output for Counties and State

Selected Years

Table I-1							
Tourism Impacts with 1.5% - Primary:Super Summary Table - Differences as Compared to REMI Standard Regional Contro							
Fairfield County CT							
Variable	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**
Total Emp (Thous)	-19.59	-19	-18.22	-17.77	-17.37	-17.1	-16.99
Priv Non-Farm Emp (Thous)	-19.47	-18.73	-17.83	-17.27	-16.78	-16.44	-16.26
GRP (Bil 92$)	-0.7641	-0.7432	-0.7119	-0.6911	-0.6714	-0.6582	-0.6517
Pers Inc (Bil Nom $)	-0.7183	-0.785	-0.8135	-0.8379	-0.8575	-0.8771	-0.8992
Disp Pers Inc (Bil Nom $)	-0.5507	-0.6063	-0.6332	-0.6562	-0.6752	-0.6939	-0.7143
PCE-Price Index 92$	-0.4128	-0.5663	-0.6337	-0.6596	-0.6624	-0.6499	-0.631
Real Disp Pers Inc (Bil 92$)	-0.3189	-0.3232	-0.3214	-0.3237	-0.327	-0.3323	-0.3396
eal Disp Pers Inc Per Cap (Thous 92$)	-0.2883	-0.1713	-0.05932	0.02971	0.1045	0.1685	0.2212
Population (Thous)	-2.48	-5.79	-8.656	-10.97	-12.88	-14.51	-15.88

Table I-2							
Tourism Impacts with 1.5% - Primary:Super Summary Table - Differences as Compared to REMI Standard Regional Control							
New Haven County CT							
Variable	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**
Total Emp (Thous)	-16.27	-15.99	-15.39	-15.01	-14.66	-14.4	-14.28
Priv Non-Farm Emp (Thous)	-16.12	-15.64	-14.88	-14.37	-13.92	-13.58	-13.39
GRP (Bil 92$)	-0.5732	-0.5654	-0.5445	-0.5265	-0.5112	-0.5003	-0.4945
Pers Inc (Bil Nom $)	-0.5534	-0.6189	-0.6431	-0.6609	-0.6723	-0.6821	-0.6932
Disp Pers Inc (Bil Nom $)	-0.4101	-0.4638	-0.4869	-0.5045	-0.5169	-0.5277	-0.5391
PCE-Price Index 92$	-0.5317	-0.6829	-0.7367	-0.7505	-0.7389	-0.7136	-0.6829
Real Disp Pers Inc (Bil 92$)	-0.2628	-0.278	-0.2808	-0.2844	-0.2874	-0.2909	-0.2955
Real Disp Pers Inc Per Cap (Thous 92$)	-0.2468	-0.1543	-0.0644	0.00845	0.07007	0.1217	0.1639
Population (Thous)	-3.039	-6.928	-10.01	-12.44	-14.41	-16	-17.32

Table I-3

Tourism Impact with 1.5% - Primary:Super Summary Table - Differences as Compared to REMI Standard Regional Control Hartford County CT							
Variable	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**
Total Emp (Thous)	-20.6	-20.43	-19.84	-19.48	-19.13	-18.87	-18.76
Priv Non-Farm Emp (Thous)	-20.38	-19.94	-19.11	-18.57	-18.06	-17.68	-17.47
GRP (Bil 92$)	-0.771	-0.7701	-0.75	-0.7318	-0.7157	-0.7039	-0.6978
Pers Inc (Bil Nom $)	-0.608	-0.693	-0.7295	-0.7564	-0.7742	-0.7886	-0.8033
Disp Pers Inc (Bil Nom $)	-0.454	-0.523	-0.5556	-0.5804	-0.5979	-0.6125	-0.627
PCE-Price Index 92$	-0.553	-0.7201	-0.7831	-0.8027	-0.7942	-0.7701	-0.7397
Real Disp Pers Inc (Bil 92$)	-0.28	-0.3011	-0.308	-0.3145	-0.3194	-0.3241	-0.3295
Real Disp Pers Inc Per Cap (Thous 92$)	-0.256	-0.1709	-0.08272	-0.01023	0.05227	0.1052	0.1489
Population (Thous)	-2.992	-6.895	-10.1	-12.63	-14.69	-16.36	-17.73

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Table I-4							
Tourism Impacts with 1.5% - Primary:Super Summary Table - Differences as Compared to REMI Standard Regional Control Tolland County CT							
Variable	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**
Total Emp (Thous)	-2.136	-2.236	-2.277	-2.321	-2.347	-2.371	-2.398
Priv Non-Farm Emp (Thous)	-2.074	-2.091	-2.063	-2.05	-2.031	-2.016	-2.011
GRP (Bil 92$)	-0.06366	-0.06879	-0.07169	-0.07385	-0.07549	-0.0769	-0.07828
Pers Inc (Bil Nom $)	-0.08144	-0.09678	-0.1053	-0.1121	-0.1173	-0.1218	-0.126
Disp Pers Inc (Bil Nom $)	-0.06003	-0.07271	-0.08032	-0.08644	-0.09128	-0.09543	-0.09933
PCE-Price Index 92$	-0.3128	-0.4477	-0.5104	-0.5365	-0.5369	-0.5228	-0.5022
Real Disp Pers Inc (Bil 92$)	-0.04742	-0.05432	-0.05805	-0.06115	-0.06363	-0.06575	-0.06775
Real Disp Pers Inc Per Cap (Thous 92$)	-0.2592	-0.1712	-0.07666	0.004095	0.07512	0.1365	0.1888
Population (Thous)	-0.6287	-1.465	-2.159	-2.722	-3.184	-3.562	-3.875

Table I-5							
Tourism Impacts with 1.5% - Primary:Super Summary Table - Differences as Compared to REMI Standard regional Control New London County CT							
Variable	1999	2000	2001	2002	2003	2004	2005
Total Emp (Thous)	-11.42	-11.22	-10.94	-10.83	-10.74	-10.72	-10.78
Priv Non-Farm Emp (Thous)	-11.32	-10.98	-10.58	-10.38	-10.21	-10.12	-10.12
GRP (Bil 92$)	-0.3435	-0.3359	-0.3261	-0.3188	-0.314	-0.3124	-0.3136
Pers Inc (Bil Nom $)	-0.2755	-0.307	-0.3234	-0.3375	-0.3499	-0.3619	-0.3746
Disp Pers Inc (Bil Nom $)	-0.2037	-0.2301	-0.2454	-0.2587	-0.2704	-0.2818	-0.2935
PCE-Price Index 92$	-0.9158	-1.159	-1.236	-1.248	-1.217	-1.162	-1.098
Real Disp Pers Inc (Bil 92$)	-0.1298	-0.1385	-0.144	-0.1502	-0.1564	-0.163	-0.17
Real Disp Pers Inc Per Cap (Thous 92$)	-0.3687	-0.2065	-0.05379	0.06858	0.1725	0.2616	0.335
Population (Thous)	-1.873	-4.338	-6.444	-8.15	-9.588	-10.82	-11.86

Table I-6							
Tourism Impacts with 1.5% - Primary:Super Summary Table - Differences as Compared to REMI Standard Regional Control Windham County CT							
Variable	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**
Total Emp (Thous)	-2.002	-2.011	-1.985	-1.98	-1.97	-1.967	-1.974
Priv Non-Farm Emp (Thous)	-1.974	-1.946	-1.888	-1.856	-1.824	-1.802	-1.793
GRP (Bil 92$)	-0.06099	-0.06155	-0.06085	-0.06021	-0.05962	-0.05929	-0.05932
Pers Inc (Bil Nom $)	-0.06121	-0.07039	-0.07535	-0.07947	-0.08276	-0.08569	-0.08857
Disp Pers Inc (Bil Nom $)	-0.04432	-0.05183	-0.05628	-0.06001	-0.06307	-0.06581	-0.06848
PCE-Price Index 92$	-0.5061	-0.6641	-0.7318	-0.7602	-0.7628	-0.7504	-0.7307
Real Disp Pers Inc (Bil 92$)	-0.03161	-0.0348	-0.03661	-0.03834	-0.03986	-0.04129	-0.04273
Real Disp Pers Inc Per Cap (Thous 92$)	-0.2165	-0.1359	-0.05442	0.01392	0.07271	0.124	0.1683
Population (Thous)	-0.4618	-1.079	-1.608	-2.047	-2.414	-2.721	-2.98

Table I-7							
Tourism Impacts with 1.5% - Primary:Super Summary Table - Differences as Compared to REMI Standard Regional Control Litchfield County CT							
Variable	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**
Total Emp (Thous)	-3.566	-3.519	-3.393	-3.315	-3.238	-3.181	-3.15
Priv Non-Farm Emp (Thous)	-3.535	-3.446	-3.286	-3.182	-3.082	-3.007	-2.961
GRP (Bil 92$)	-0.1134	-0.112	-0.1077	-0.1039	-0.1005	-0.09782	-0.09618
Pers Inc (Bil Nom $)	-0.1222	-0.1376	-0.1442	-0.1494	-0.153	-0.1561	-0.1594
Disp Pers Inc (Bil Nom $)	-0.092	-0.1047	-0.1108	-0.1157	-0.1192	-0.1223	-0.1255
PCE-Price Index 92$	-0.4397	-0.5755	-0.6264	-0.6417	-0.6331	-0.6126	-0.5851
Real Disp Pers Inc (Bil 92$)	-0.06455	-0.06897	-0.07034	-0.07186	-0.0731	-0.07436	-0.07586
Real Disp Pers Inc Per Cap (Thous 92$)	-0.2576	-0.1536	-0.05132	0.03129	0.1011	0.1595	0.209
Population (Thous)	-0.7499	-1.732	-2.54	-3.187	-3.713	-4.136	-4.496

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Table I-8

Tourism Impacts with 1.5% - Primary:Super Summary Table - Differences as Compared to REMI Standard Regional Control
Middlesex County CT

Variable	1999	2000	2001	2002	2003	2004	200
Total Emp (Thous)	-4.767	-4.752	-4.669	-4.633	-4.594	-4.572	-4.57
Priv Non-Farm Emp (Thous)	-4.722	-4.644	-4.506	-4.425	-4.348	-4.295	-4.27
GRP (Bil 92$)	-0.1486	-0.1483	-0.1456	-0.1433	-0.1413	-0.1402	-0.1
Pers Inc (Bil Nom $)	-0.1358	-0.1551	-0.1648	-0.1724	-0.1781	-0.1831	-0.188
Disp Pers Inc (Bil Nom $)	-0.1022	-0.1179	-0.1265	-0.1334	-0.1387	-0.1434	-0.148
PCE-Price Index 92$	-0.7022	-0.924	-1.019	-1.061	-1.067	-1.053	-1.02
Real Disp Pers Inc (Bil 92$)	-0.06747	-0.0724	-0.0747	-0.07679	-0.0786	-0.08038	-0.0823
Real Disp Pers Inc Per Cap (Thous 92$)	-0.3297	-0.1941	-0.0512	0.06742	0.1686	0.2532	0.325
Population (Thous)	-0.7748	-1.825	-2.767	-3.528	-4.156	-4.669	-5.10

Table I-9							
Tourism Impacts with 1.5% - Primary:Super Summary Table - Differences as Compared to REMI Standard Regional Control State, CT							
Variable	1999	2000	2001	2002	2003	2004	2005
Total Emp (Thous)	-80.35	-79.16	-76.72	-75.34	-74.04	-73.19	-72.9
Priv Non-Farm Emp (Thous)	-79.6	-77.41	-74.14	-72.1	-70.25	-68.94	-68.27
GRP (Bil 92$)	-2.838	-2.805	-2.718	-2.649	-2.589	-2.549	-2.531
Pers Inc (Bil Nom $)	-2.556	-2.864	-2.999	-3.106	-3.185	-3.256	-3.332
Disp Pers Inc (Bil Nom $)	-1.917	-2.17	-2.295	-2.395	-2.473	-2.543	-2.615
PCE-Price Index 92$	-0.5155	-0.6787	-0.7429	-0.764	-0.7584	-0.7372	-0.7095
Real Disp Pers Inc (Bil 92$)	-1.202	-1.271	-1.294	-1.321	-1.345	-1.372	-1.403
Real Disp Pers Inc Per Cap (Thous 92$)	-0.2701	-0.162	-0.05587	0.0303	0.1036	0.1659	0.2176
Population (Thous)	-13	-30.05	-44.28	-55.68	-65.03	-72.78	-79.24

Appendix J

Regional Purchase Coefficients for Tourism

Table J-1 Regional Purchase Coefficients for CT Tourism 1999			
Industry	Purchases from CT Businesses	CT Labor	Total
Hotels	0.238	0.399	0.637
Eating & Drinking	0.236	0.329	0.565
Amusements	0.267	0.354	0.621
Local & Interurban Trans.	0.198	0.415	0.613
Air Trans.	0.255	0.344	0.599
Other Transportation	0.347	0.343	0.690
Rest of Retail	0.221	0.402	0.623