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Intermodal Connections Study Southeast

Final Report

Section 3: Visitor Market Analysis

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3. VISITOR MARKET ANALYSIS

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3. VISITOR MARKET ANALYSIS

3.1 INTRODUCTION

The consultant team identified and quantified the current tourist markets and the potential tourist market that would make use of an expanded visitor-oriented transit system in southeastern Connecticut. The existing available tourism industry data were reviewed, attractions in the region were surveyed, and a visitor intercept survey was administered to assess the degree of interest among existing visitors to the region in using a transit service as part of their visitor experience. Based upon this information, the size of the tourist market representing potential users of the new transit service was quantified. The findings of this analysis are presented in this chapter, which is organized into the following sections:

- Tourism Industry Overview
- Market Overview
- Tourist Transit Survey
- Potential Users

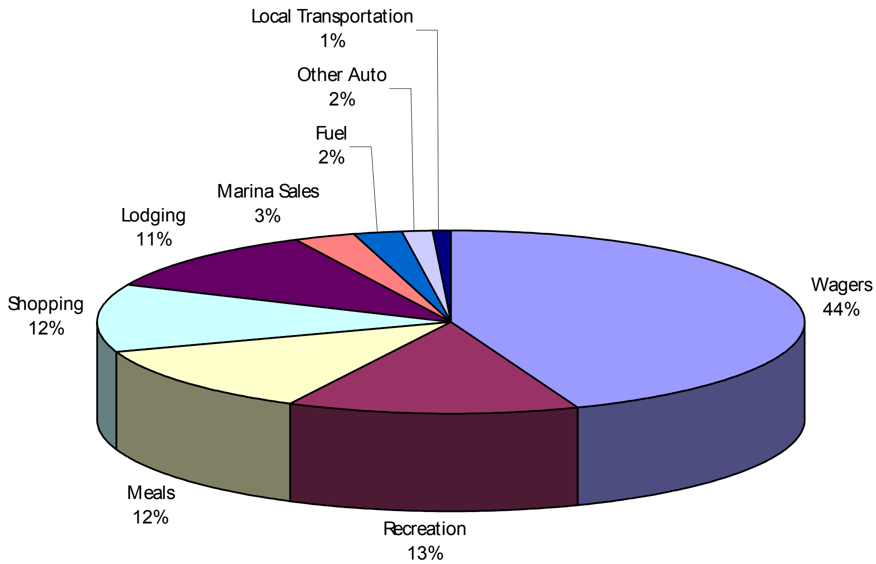
3.2 TOURISM INDUSTRY OVERVIEW

Southeastern Connecticut has developed into the strongest visitor destination in the state. One measure of the region's strength as a tourist destination is tourism revenues. According to the most recent available data, a statewide tourism economic impact study prepared by the University of Connecticut, tourism expenditures were highest in southeastern Connecticut in 2001. Specifically, the region generated $3.4 billion in travel and tourism expenditures, representing 34 percent of the statewide total.

A closer review of the breakdown on expenditure categories reveals that gaming (wagers) dominated expenditure patterns of travelers to the region and totaled $1.5 billion in 2001, as indicated in Figure 3.2-1. This is to be expected, as southeastern Connecticut is the center of gaming in New England.

The tourism industry in southeastern Connecticut can be better understood by evaluating the region's tourism infrastructure—the base attractions available to visitors and the performance of the lodging industry. The following section explores these infrastructure components.

Figure 3.2-1: Southeastern Connecticut Travel & Tourism Expenditures by Expenditure Category, 2001



Source: University of Connecticut, Connecticut Center for Economic Analysis, *The 2001 Economic Impact of Connecticut's Travel and Tourism Industry, May 2003*; Economics Research Associates.

3.2.1 Tourism Infrastructure: Attractions

Southeastern Connecticut, and the community of Mystic in particular, has long been a popular destination for visitors. Attractions such as Mystic Seaport, Mystic Aquarium, and the U.S.S. Nautilus have long drawn visitors to the region. Mystic Seaport is among the attractions that have been in operation the longest, having begun in the 1930's. Mystic Seaport saw a peak in attendance of over a half million visitors during the late 1960's and 1970's following a feature article in National Geographic. A 1992 visitor survey commissioned by Mystic Coast & Country, the regional tourism promotion agency, revealed that the top five attractions that visitors intended to visit in the region were Mystic Seaport, Mystic Aquarium, Nautilus Submarine, Rhode Island Beaches, and Downtown New London, Groton, and Mystic.

Since the opening of Foxwoods casino in 1986, and the subsequent addition of Mohegan Sun in 1996, the tourism landscape of southeastern Connecticut has changed dramatically. Today, the attractions base consists of the two major casinos (Foxwoods and Mohegan Sun), plus the long-standing leisure-oriented activities (shopping, beaches, museums, aquarium, etc.).

As illustrated in Figure 3.2-2, the casinos clearly dominate the tourism landscape in terms of attendance. However, the pre-existing concentrations of attractions in Mystic and other locations in the region have sustained nodes of visitor activity in southeastern Connecticut. Today, apart from the casinos, other strong attractions in the region are Mystic Aquarium, Mystic Seaport, U.S.S. Nautilus Museum, and the Mashantucket Pequot Museum (at the Foxwoods resort). There are also a number of arts, history, and culture-oriented attractions in the region that achieve relatively modest levels of visitation (generally less than 50,000 visitors annually), as shown in Table 3.2-1. Area beaches in Connecticut and nearby Rhode Island are also a draw for visitors.

Figure 3.2-2: Location & Attendance at Selected Southeastern Connecticut Attractions

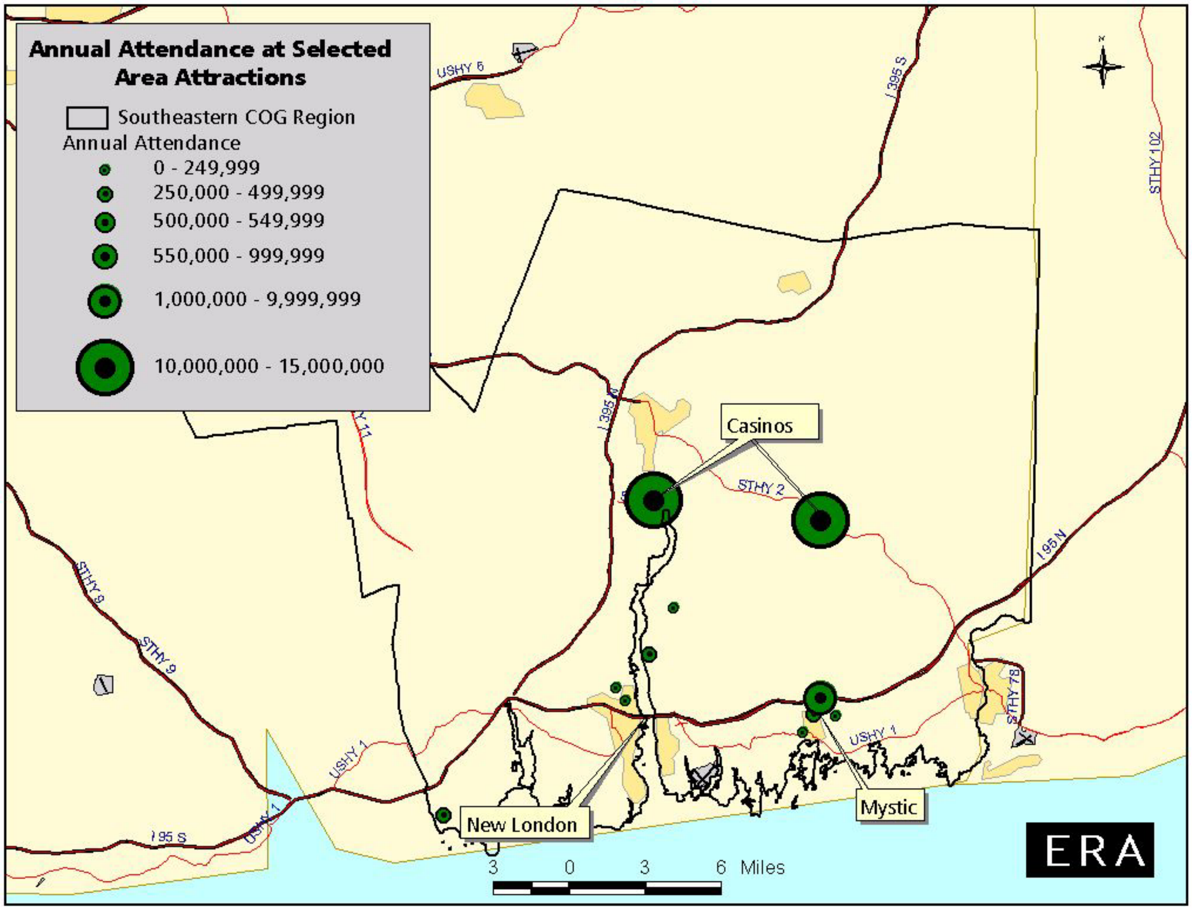


Table 3.2-1: Selected Attractions in Southeastern Connecticut

Attraction	Reported Annual Attendance
Foxwoods Resort Casino	(Combined visitation): 25+ million
Mohegan Sun	
Mystic Aquarium & Institute for Exploration	820,000
Rocky Neck State Park	421,467
Mystic Seaport	350,000
U.S.S. Nautilus and Submarine Force Museum	250,000
Mashantucket Pequot Museum & Research Center	242,000
Florence Griswold Museum	43,509
Lyman Allyn Museum of Art at Connecticut College	37,144
Denison Pequotsepos Nature Center	30,000
Science Center of Eastern Connecticut	27,000
U.S. Coast Guard Museum	25,000
Mystic Art Association	10,000

Sources: Individual attractions; Official Museum Directory, 2003; Economics Research Associates, September 2003.

Sources of Visitation

Nearby metropolitan areas such as New York City area (including Long Island), Boston, Philadelphia, and Albany are the predominant sources of daytrip and overnight visitors, along with residents of New Jersey. Traditionally, the region's leisure attractions have tended to draw visitors more strongly south of Connecticut, rather than north. A 1994 report commissioned by the region's convention and visitor bureau revealed that the region received a third of its visitors from New York, a quarter from Connecticut, ten percent from New Jersey, seven percent from Massachusetts, and just over three percent each from Rhode Island and Pennsylvania. The addition of the casinos reshaped the visitor landscape and succeeded in improving the penetration of markets north of Connecticut.

Casinos

For years, the southeastern Connecticut casinos have outperformed other casinos at East Coast venues such as Atlantic City. However, it is anticipated that the New England casino industry will face increased competition since New York recently approved six Indian casinos. Governor Pataki also has proposed that 4,500 video poker machines be installed in Times Square in New York City, and the addition of casinos on Governor's Island has been discussed as well. In addition, new gaming venues have been proposed for southern Massachusetts, Rhode Island, and Pennsylvania. While increased competition could potentially affect visitation to southeastern Connecticut, Foxwoods and Mohegan Sun are continuing to enhance their product offerings and expand their markets by offering more family-oriented activities and special events.

Leisure Attractions

The region's long standing leisure attractions continue to be popular destinations for visitors, although several key attractions have reported declining attendance over the past five years. Explanations range from the effects of a poor economy, post-September 11th security concerns, and lack of investment in new attraction content.

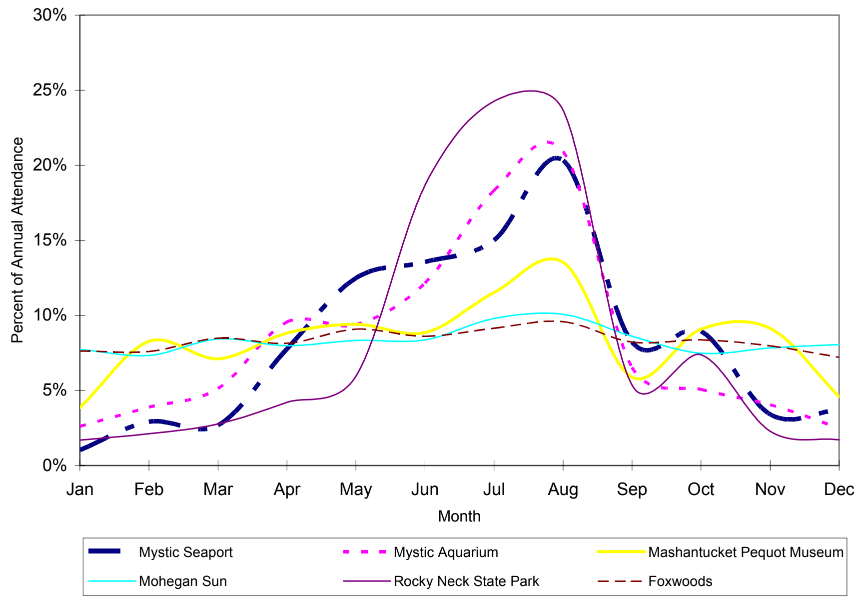
The addition of the Mashantucket Pequot Museum in 1998 represents the most significant new addition to southeastern Connecticut's leisure attraction industry in recent years. However, a new $900 million theme park development was recently proposed that is planned to include movie studios, a 700-room hotel, and a performing arts college. The so-called "Utopia" project is proposed to be located at the 470-acre Norwich Hospital site, less than a mile from Mohegan Sun and approximately 7 miles from Foxwoods. While it is unclear whether this project will in fact be built, it would provide a significant new leisure attraction for the region that could entice new or repeat visitation.

Apart from this new proposal, some of southeastern Connecticut's leisure attractions are planning significant improvements. Mystic Aquarium has begun a $52 million expansion that includes the new recently opened major exhibit, a new research facility that is under construction and will offer expanded facilities for researchers and visitors. At Mystic Seaport plans are being developed to undertake a multi-million dollar renovation and expansion that is expected to boost attendance. In addition, a state-funded heritage tourism study is planned that will examine how to increase visitation to historic and cultural attractions in the New London and Groton areas. These efforts signal an improved base of leisure attractions, which, coupled with southeastern Connecticut's role as an established tourism destination, results in a tourism region that is well positioned to compete for the time and money of leisure travelers.

Seasonality of Visitation

As illustrated in Figure 3.2-3, the seasonality pattern of visitors to the region is marked by a baseline of relatively even year-round attendance casino visitors. This is overlain by a more typical seasonal tourism pattern exhibited by the leisure attractions, which show a peak in visitation during the summer season with a strong fall shoulder season. Connecticut is among the New England states that experience a strong Fall shoulder tourism season associated with the turning of the leaves.

Figure 3.2-3: Seasonality of Visitation at Selected Southeastern Connecticut Attractions

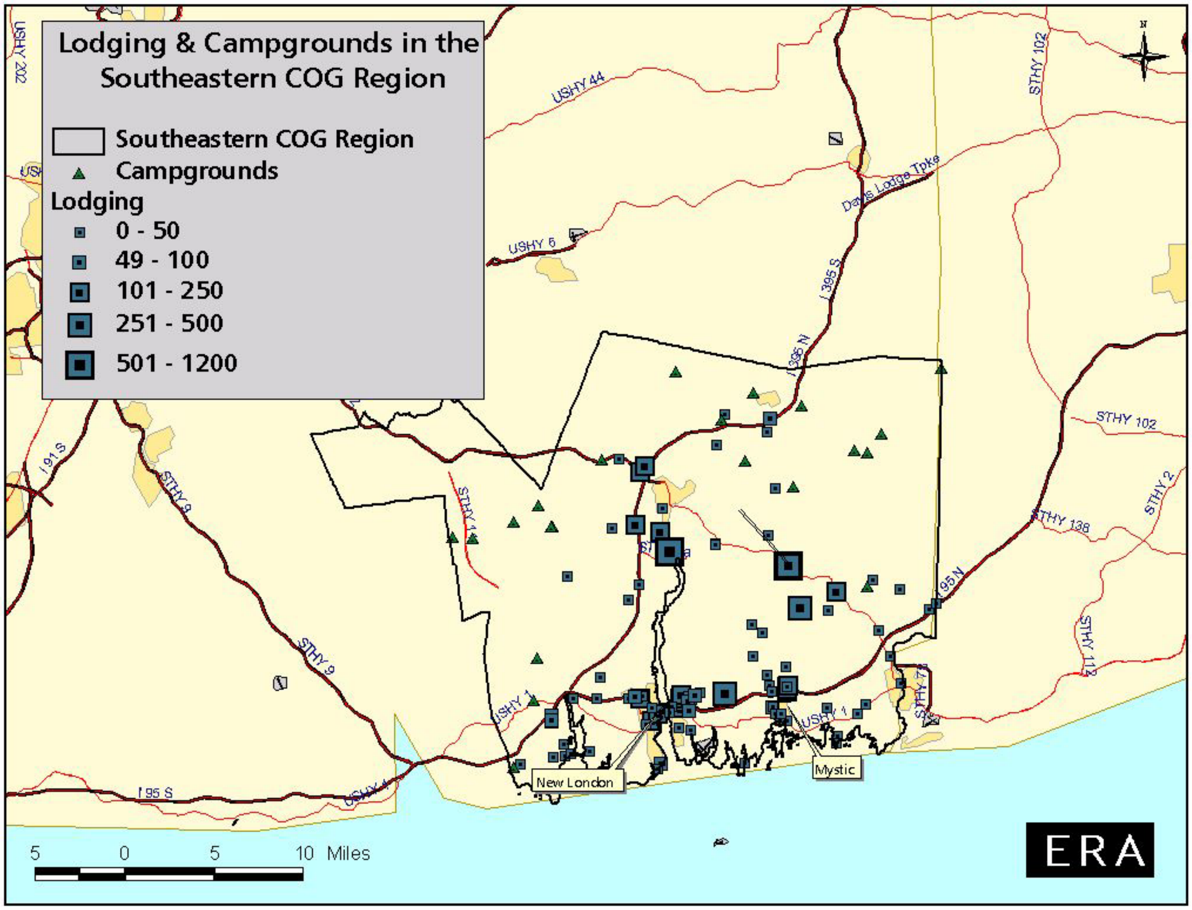


The patterns of visitation during a typical summer week, as reported by a handful of attractions, reveals a pattern common to visitor attractions. Peak visitation tends to occur on the weekends, with Saturday the busiest day.

3.2.2 Tourism Infrastructure: Lodging

Lodging is another useful measure of the tourism industry. According to Mystic and More! (now Eastern Connecticut Tourism District), the tourism promotion agency in southeastern Connecticut, there are a total of 7,606 hotel/motel rooms in the region. As illustrated in Figure 3.2.4, lodging is concentrated along I-95 and near the casinos, and the largest properties are operated by the casinos.

Figure 3.2-4: Size & Distribution of Lodging in Southeastern Connecticut



A census by Smith Travel Research, a company that tracks lodging industry statistics nationwide, reports that there are a total of 7,205 rooms available in New London County as of July 2003. As Table 3.2-2 shows, the supply of rooms has steadily increased between 1997 and 2002. The casino hotels comprise approximately 41 percent of the available hotel/motel rooms in the region. Moreover, among the hotels that reported operating data to Smith Travel Research (which excludes the casino hotels), the average daily rate has increased as occupancy rates have declined. Although year-to-year data is not available for the casino hotels, reportedly these hotels achieve far higher occupancy rates, average daily room rates, and revenue per available room (a.k.a. revpar—the best measure of year-to-year growth because it considers simultaneous changes in both room rate and occupancy levels). According to published sources, the casino hotels achieve occupancy rates between 77 and 90 percent, with an average daily rate of $172 and revenue per available room of $133.

In contrast, the non-casino reporting hotels posted an occupancy rate of 64 percent, an average daily rate of $64, and revenue per available room of $60 in 2002. Between 1998 and 2001 the revenue per available room steadily increased among the non-casino reporting hotels, and signaled a growing tourism industry. However, in 2002, revpar declined in tandem with broader trends nationwide that saw a decline in tourism associated with a weak economy. Despite the softening of the lodging industry in southeastern Connecticut, some hoteliers reported improved performance during the 2003 summer season as compared to the previous year.

Table 3.2-2: Lodging Industry Characteristics in Southeastern Connecticut

Annual Performance Indicators
Selected Hotels In New London County, CT 1997-2002

	1997	1998	1999	2000	2001	2002	AVG. ANN'L GROWTH 1997-2002
Available Roomnights (Supply)	1,767,412	1,841,551	1,860,162	1,923,320	2,070,367	2,507,815	**6.0%**
Occupied Roomnights (Demand)	1,293,644	1,251,926	1,294,444	1,291,723	1,352,098	1,607,859	**3.7%**
Annual Occupancy	73.2%	68.0%	69.6%	67.2%	65.3%	64.1%	**(2.2%)**
Average Daily Rate	$ 52.90	$ 53.54	$ 55.32	$ 59.17	$ 61.96	$ 63.59	**3.1%**
Revenue/Available Room (1)	$ 58.83	$ 55.14	$ 57.78	$ 58.36	$ 62.03	$ 59.98	**0.3%**
Year-To-Year % Growth							
Annual Occupancy	-	(7.1%)	2.4%	(3.5%)	(2.8%)	(1.8%)	
Average Daily Rate	-	1.2%	3.3%	7.0%	4.7%	2.6%	
Revenue/Available Room	-	(6.3%)	4.8%	1.0%	6.3%	(3.3%)	

Roomnights = number of rooms times available nights
(1) Revenue per available room is the best measure of year-to-year growth because it considers simultaneous changes in both room rate and annual occupancy levels.
(2) The total room inventory among has increased from 4,714 in January 1997 to 7,205 in July 2003.

Source: Smith Travel Research; Economics Research Associates, August 2003.

3.2.3 Visitor Characteristics

Visitors to southeastern Connecticut can be generally characterized as casino visitors and attractions visitors, based upon these visitors' primary trip purpose. Following is an overview of the characteristics for these sub-segments of the visitor market based upon information provided by individual attractions. This information has been summarized to prevent the disclosure of proprietary information.

Casino Visitors

With more than 25 million visits[1] annually, Foxwoods and Mohegan Sun dominate the tourism landscape in southeastern Connecticut. According to the casinos, the overwhelming majority (90% +) of their patrons are daytrip visitors. Visitors are drawn heavily from Connecticut, Rhode Island, Massachusetts, and New York. As in most places, the car is the primary mode of transit for casino visitors (roughly 90% travel by car). However, bus tour groups comprise an important segment considering the overall level of visitation; ten percent of 25 million translates into an estimated 2.5 million visitors who arrive by bus. Casino visitors also are known to use the Cross Sound Ferry to travel from the New York region (Long Island) to southeastern Connecticut. Casino visitors are largely an adult market, and seniors comprise a third of overall visitation.

[1] Note that this visitation estimate reflects multiple visits by many individual visitors.

Leisure Attraction Visitors

Attractions visitors comprise a comparatively small, yet still important segment of the tourism industry in southeastern Connecticut. According to Mystic Seaport and Mystic Aquarium, the two flagship attractions in the area, families and school groups are important visitor segments. Unlike the casinos, the majority (roughly two-thirds) of attractions patrons are overnight visitors and are traveling from some distance away; reportedly just a third of all visitors are from Connecticut, Massachusetts, and Rhode Island. Anectodal reports indicate that during the summer a larger share of visitors are from some distance away, while during the winter there are more visitors from the nearby areas.

3.2.4 Summary

Overall, southeastern Connecticut is a strong tourism destination with an excellent base of attraction offerings. The casinos continue to evolve with new offerings, and significant investments are planned by key leisure attractions in the region. The continued refreshment of the visitor experience by the region's flagship attractions bodes well for the future of the region's tourism industry. Based on population growth and assumptions regarding enhancements to the region's attractions, growth on the order of magnitude of 1.2 – 1.8 million visitors over the next decade is not unreasonable, the impact of changing competition not withstanding.

3.3 MARKET OVERVIEW

The potential success of a visitor-oriented intermodal transit system depends in part upon the size and characteristics of the markets that are available to support the transit system. The consultant team conducted an analysis of the size and demographics of the available markets that represent the pool of ***potential*** visitors. For the purposes of this analysis, the consultant team divided the markets into two major visitor markets: the daytrip market, and the overnight tourist market. This section describes the important sub-segments and characteristics of these markets.

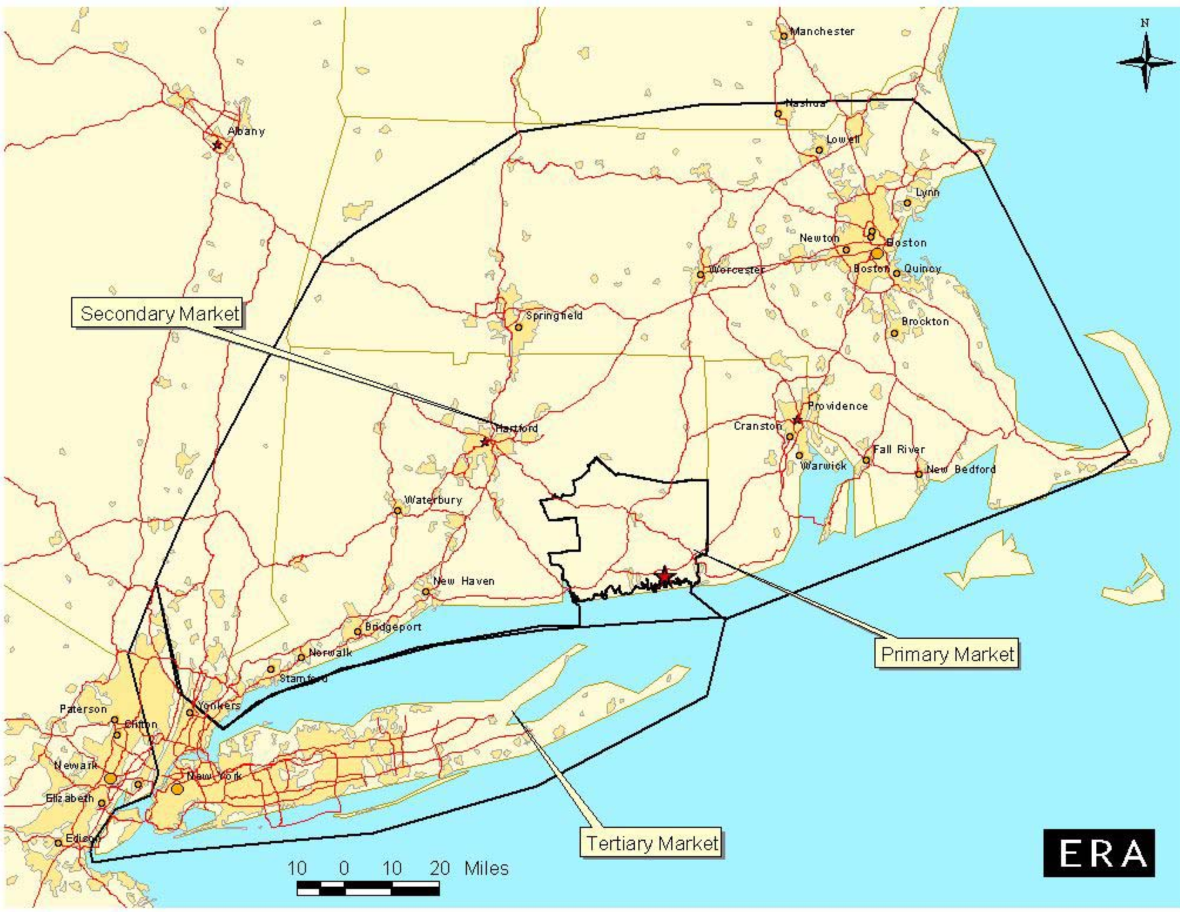
3.3.1 Daytrip Market

There is a strong relationship between distance and time traveled, and willingness to visit a destination. Experience reveals that at any given destination, the daytrip market is overwhelmingly drawn from within a two-hour drive of the destination (i.e., a four-hour round trip in a single day). Because of their close proximity, residents within the daytrip market would have more opportunities to visit repeatedly as compared to the tourist market. While surveys of visitors to attractions in southeastern Connecticut reveal a similar pattern, the casinos, due to the scale and uniqueness of their attraction offerings, have succeeded in extending the daytrip market slightly beyond the two-hour drive time to draw daytrip visitors from New York City and Long Island. Considering these patterns of visitation, the consultant team divided the daytrip visitor market for southeastern Connecticut into the following three sub-segments:

- The Primary Daytrip Market—local area residents who reside within New London County.
- The Secondary Daytrip Market—residents who live beyond New London County, but within a two-hour drive of Mystic.
- The Tertiary Daytrip Market—residents of New York City and Long Island.

The characteristics of these markets are described below.

Figure 3.3-1: Map of the Southeastern Connecticut Daytrip Markets



Primary Daytrip Market

The population of the primary daytrip market (residents of New London County) totals 260,441. Over the next five years the population is expected to increase 1.4 percent to total 264,040 residents. The primary daytrip market is the least diverse of the three daytrip markets, as 83.8 percent of the population is Caucasian, 5.5 percent is of Hispanic origin, and 5.3 percent are African American. The average household income totals $69,036. This is higher than the nationwide average of $64,748, but lower than the average household incomes in the secondary and tertiary markets.

Secondary Daytrip Market

The secondary daytrip market includes residents of Connecticut (outside New London County), Rhode Island, Massachusetts, and Westchester County, New York. The total population of the secondary market is 11.6 million and is projected to increase by 2.6 percent to a total of 11.9 million in 2008. The secondary market has a sizeable Hispanic population (8.6 percent of the population), but is still largely Caucasian at 76.2 percent of the population. African Americans comprise the next largest ethnic segment at 6.9 percent of the population. The secondary market has a large share of affluent households, as the average household income totals $83,317 and 39 percent of the households earn more than $75,000 annually.

Tertiary Daytrip Market

The tertiary market encompasses the most densely populated place in the United States—New York City and Long Island. This analysis is based upon drive times, and although Long Island residents may reach southeastern Connecticut via a 1½ hour ferry ride, the additional travel time to the ferry plus wait time reasonably places Long Island in the tertiary market. With 8.6 million residents, the tertiary market is expected to experience the greatest growth over the next five years as compared to the primary and secondary markets. By 2008 the tertiary market is projected to total 8.9 million people. The tertiary market is extraordinarily diverse. Caucasians comprise 37.5 percent of the population, residents of Hispanic origin total 21.8 percent, African Americans comprise 20.5 percent, and 10.9 percent represent a mix of "Other" ethnicities as categorized by the U.S. Census Bureau. Average household income totals $71,083. The tertiary market has the highest percentage of low income households among the daytrip markets; 30 percent of the tertiary market earns less than $25,000 annually.

Summary

The primary, secondary, and tertiary markets total 20.5 million people, representing an enormous pool of potential visitors. Moreover, this market is projected to grow in the coming years. The relative affluence of these markets is also a boon. For residents of the New York City region, southeastern Connecticut is the closest opportunity to experience New England and experience a respite from city life.

Presently, the casinos are successfully penetrating the daytrip market; with approximately 90 percent of casino visitors coming from the daytrip market this translates into an estimated 22.5 million daytrip casino visitors. Another way to look at this is at the number of visits supported by the available populations. For the casinos, the available population is nearly equal to the number of visits (a 1:1 ratio). But the same population only generates one visit for every 68 people in the daytrip market for leisure attractions. Therefore, there is tremendous upside potential for the available population to support additional visits to southeastern Connecticut. In addition to generating more visits overall, there is the opportunity to increase repeat visitation and to convert day-trippers to overnight visitors.

Table 3.3-1: Summary of Daytrip Markets for Southeastern Connecticut

Market	2003	2008	% Change
Primary Market	260,441	264,040	1.38%
Secondary Market	11,601,858	11,901,519	2.58%
Tertiary Market	8,605,129	8,896,511	3.39%
Total Available Markets	**20,467,429**	**21,062,070**	**2.91%**

Source: ESRI Business Information Solutions; Economics Research Associates.

Table 3.3-2: Characteristics of the Daytrip Market for Southeastern Connecticut

	Daytrip Market				USA Benchmark
	Primary Market	*Secondary Market*	*Tertiary Market*	*Total Daytrip Market*	
Population					
2003 Population	260,441	11,601,858	8,605,129	20,467,429	286,466,357
2008 Population	264,040	11,901,519	8,896,511	21,062,070	303,552,614
Percent change	1.4%	2.6%	3.4%	2.9%	6.0%
Households (2003)					
Households	101,310	4,447,351	3,211,736	7,760,397	107,075,010
Families	67,315	2,909,511	2,003,219	4,980,045	72,547,960
Average Household Size	2.6	2.6	2.6	2.6	2.6
Ethnicity (2003)					
White	83.8%	76.2%	37.5%	58.8%	66.4%
Black	5.3%	6.9%	20.5%	13.0%	11.3%
American Indian, Eskimo, or Aleut	1.1%	0.3%	0.5%	0.4%	0.8%
Asian or Pacific Islander	2.2%	3.6%	8.8%	5.9%	3.7%
Other	2.2%	4.4%	10.9%	7.3%	5.4%
Hispanic Origin	5.5%	8.6%	21.8%	14.6%	12.4%
	100.0%	100.0%	100.0%	100.0%	100.0%
Age (2003)					
Population Age < 19	27%	27%	26%	26%	28%
Population Age 65+	13%	13%	12%	13%	25%
Median Age	38.0	37.8	35.7	36.5	36.5
Income (2003)					
Median Household Income	$54,468	$60,038	$45,767	$54,053	$50,969
Average Household Income	$69,036	$83,317	$71,083	$78,187	$64,748
Per Capita Income	$27,461	$32,356	$26,823	$29,999	$24,561
Median Disposable Income	$40,288	$43,218	$33,458	$39,125	$38,155
Household Income < $25,000	20%	21%	30%	25%	26%
Household Income > $75,000	32%	39%	29%	35%	28%

Source: ESRI Business Information Solutions; U.S. Census Bureau; Economics Research Associates

3.3.2 Overnight Tourist Market

The overnight traveler market consists of persons traveling to or through the southeastern Connecticut region. A serviceable estimate of the size this market was not available. Hence, the consultant team developed an estimate of this market using a variety of data sources. The estimate is summarized in Table 3.3-3 and includes the following four components:

- Travelers staying overnight in commercial accommodations (hotels and motels) in the southeastern Connecticut region are estimated at approximately 2.5 million travelers annually.
- Travelers staying at the homes of friends and relatives within the primary and secondary daytrip market areas, estimated at approximately 5.8 million annually.
- Travelers passing through the Mystic region en route to destinations on Cape Cod (adjusted to exclude residents of Connecticut, who are already accounted for in the figures for the primary and secondary daytrip market areas.) These pass-through travelers are estimated at about 1.1 million annually.
- Travelers passing through the Southeastern region en route to destinations in Rhode Island (adjusted to exclude those spending the night in the Rhode Island portion of the Mystic region and therefore already accounted for in the first category above.) These pass-through travelers are estimated at about 1 million annually.

Altogether, the size of the overnight traveler market is estimated at roughly 11.4 million. Assuming a modest rate of growth consistent with national trends over the past eight years, the overnight traveler market is projected to increase to 12.4 million by 2008.

Table 3.3-3: Summary of the Overnight Visitor Market for Southeastern Connecticut

Estimated number of travelers staying overnight in the southeastern Connecticut region (person-trips)	2,461,431
Estimated number of travelers passing through the region en route to Cape Cod (person-trips)	2,162,000
Estimated number of travelers passing through the region en route to destinations in Rhode Island	994,607
Subtotal	5,618,038
Estimated number of travelers visiting friends and relatives in the primary market area (discrete travelers)	126,851
Estimated number of travelers visiting friends and relatives living in the secondary market (discrete travelers)	5,650,845
Subtotal	5,777,696
Total (2003)	**11,395,735**
Projected annual growth	1.8%
Estimated Overnight Visitor Market, 2008	12,438,316

Sources: ESRI Business Information Solutions, 2003 Estimates & Projections; Smith Travel Research; Mystic Places; American Travel Survey, 1995; Rhode Island Travel & Tourism Report 2000; Massachusetts Office of Travel & Tourism; Travel Industry Association, *Domestic Travel Market Report, 2002 Edition*; and, Economics Research Associates.
Note: The tertiary market has been excluded from the overnight visitor market analysis because New York City is the destination of choice for overnight visitors based in this area.

3.4 TOURIST TRANSIT SURVEY

As part of the Intermodal Corrections Study Southeast, a tourist intercept survey was administered to gauge visitors' interest in various transit alternatives. The survey was administered in August 2003, during peak tourist season, at the key visitor attractions in southeastern Connecticut. The survey locations included Mystic Aquarium, Mystic Seaport, Mohegan Sun, Foxwoods, area visitor centers, and a handful of hotels. The survey questions focused on visitor activities and demographics, assessing the level of interest in alternative intermodal transit options, and identifying the desired features of transit service. Three different transit options were tested:

1. Shuttle service connecting airports in Hartford, Providence, and Groton-New London to major attractions and hotels in southeastern Connecticut.
2. Shuttle service connecting ferry and railroad terminals with major attractions, hotels and resorts in the region.
3. A "circulator" shuttle, as it was called in the survey, defined as a service that transports visitors among the attractions and hotels in the region.

A copy of the survey is included in Appendix I of this report. Following is an overview of the survey findings.

3.4.1 Overview of Responses

A total of 914 responses were received. Of these, 509 valid responses were administered at the casinos and 367 were administered at the Mystic Aquarium or Mystic Seaport attractions. Because the visitor characteristics of these two market sub-segments differ, as discussed previously, the survey responses were cross-tabulated according to respondents' answer to the question regarding primary trip purpose. Therefore, the survey findings presented below are grouped according to two major response categories: 1) visitors whose primary trip purpose was to visit casinos, and, 2) visitors whose primary trip purpose was to visit leisure attractions.

Comparison of Casino and Leisure Attraction Visitors

A comparison of responses by these two visitor sub-segments reveals some differences in market characteristics and opinions about the transit alternatives. Notable characteristics of the markets are as follows:

- The majority (60%) of casino visitors were taking a day trip, while only 38 percent of leisure attraction visitors were day-trippers. This is consistent with patterns reported by the casinos and attractions.
- The casino respondents reported a high degree of repeat visitation, with half of all respondents reporting that they had visited the area seven or more times during the past

year. In contrast, leisure attraction visitors were more likely to have visited the area only once in the last year (40% of all attractions visitors).

- Casino visitors were less likely to visit other attractions compared to leisure attraction visitors. Thirty percent of casino visitors reported visiting other attractions in the region, while 46 percent of leisure attraction visitors reported visiting other attractions including the casinos. Considering that casino visitors typically visit for a shorter period of time compared to leisure attraction visitors, it is not surprising that they are less likely to participate in other visitor activities.
- Leisure attraction visitors have a far greater share of family visitors than the casinos. Eleven percent of casino visitors reported traveling with children under 18, whereas families represent 47 percent of leisure attraction visitors.
- A slightly higher share of casino visitors does not own a car (18%) than attractions visitors (13%). This may be correlated with the fact that express coach service is offered to the casinos, which attracts a large number of seniors who may not own cars.
- The demographic characteristics of casino respondents reveal a slightly older and less affluent population when measured against leisure attraction visitors.

Table 3.4-1: Comparison of Selected Survey Findings for Casino and Leisure Attraction Visitors

	Casino Visitors	Leisure Attraction Visitors
Trip Length	60% daytrip	38% daytrip
Frequency of visits	49% visit 7+ times per year	39% visiting for 1st time
Cross visitation	30% visit other attractions	46% visit casinos
Traveling with kids	11%	47%
Do not own car	18%	13%
Age	47% between 25-54	64% between 25-54
Income	38% earn \$55k-\$99k	44% earn \$55k-\$99k

The characteristics of the survey respondents are consistent with the characteristics of visitors as reported by the casinos and the key leisure attractions in the region.

Interest in Transit Alternatives

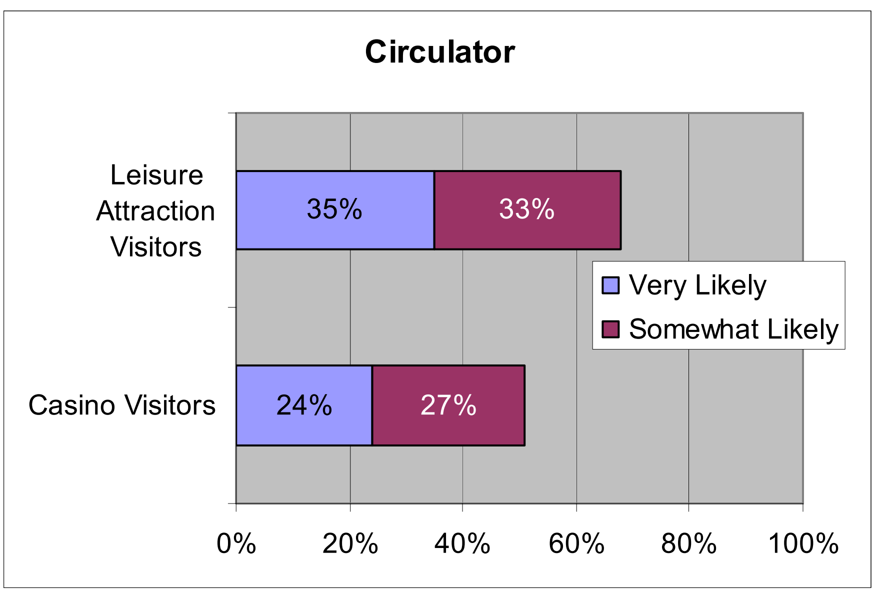
Overall, both casino and leisure attraction visitors responded positively to the idea of new transit alternatives for the region, although it should be noted that for this type of survey respondents tend to be more positive in their responses than their actual behavior would demonstrate. The survey findings reveal the following:

- The circulator service received the most positive response with the majority of respondents (59%) indicating they would be likely to use this service. Of these responses, 28 percent indicated they would be very likely (rather than somewhat likely) to use a circulator shuttle.

- Due to the sample size, it is not possible to develop a definitive profile of respondents who would be most likely to use a circulator service. However, the available data suggests that respondents who indicated they would be very likely to use the circulator service were overnight visitors coming to southeastern Connecticut to visit the area's leisure attractions, who stayed at a hotel in the local area (with a larger share coming from New York state), and were traveling in larger parties (3 or more people). These respondents were also less likely to be traveling with kids and to be less affluent, as compared to all other respondents.
- A shuttle that connects rail and ferry terminals to key attractions in the region received the next highest number of positive responses. Overall, 54 percent of respondents indicated that they would be likely to use this service, of which 24 percent would be very likely.
- The airport shuttle idea received the least positive responses, with a third of respondents indicating that they would be likely to use this service. Out of all the positive responses, 17 percent were very likely to use this service. It is worth noting that the majority of those surveyed did not arrive in the region via air transportation.

Therefore, the circulator service and rail/ferry shuttle received more positive than negative responses. Among all the survey respondents, those most likely to use any of the three transit options can be characterized as middle to upper-income (with an annual household income between $55,000 and $99,999), between ages 25-54, own two cars, and are not traveling with children. However, the degree of interest varied according to the primary trip purpose of respondents. As illustrated in Figure 3.4-1, leisure attraction visitors were more likely to use the transit alternatives compared to casino visitors.

Figure 3.4-1: Degree of Interest in Transit Alternatives



Desired Features

Survey respondents were asked to identify which transit features would be most important in influencing their use of the service. As shown in Figure 3.4-2, the availability of onboard information, frequency of service, and cost were considered to be the most important features for the circulator service. Similarly, for the rail/ferry terminal shuttle the most desired features were the availability of information in advance of the trip, the frequency of service, and the cost, as shown in Figure 3.4-3.

Figure 3.4-2: Desired Features of a Circulator Shuttle

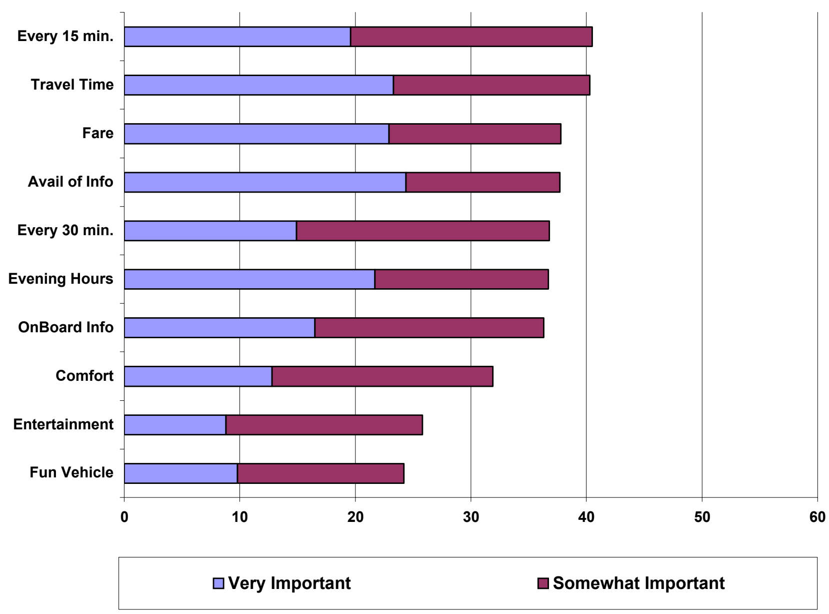
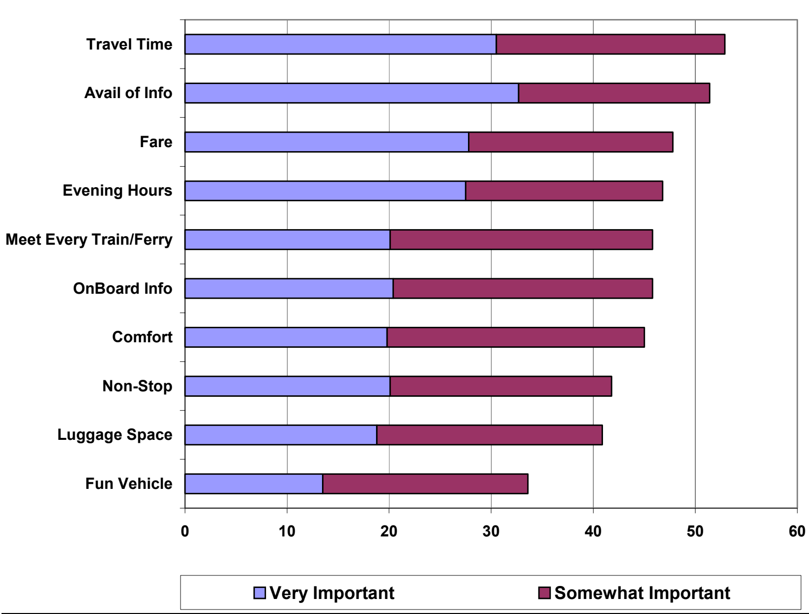


Figure 3.4-3: Desired Features of a Rail/Ferry Shuttle



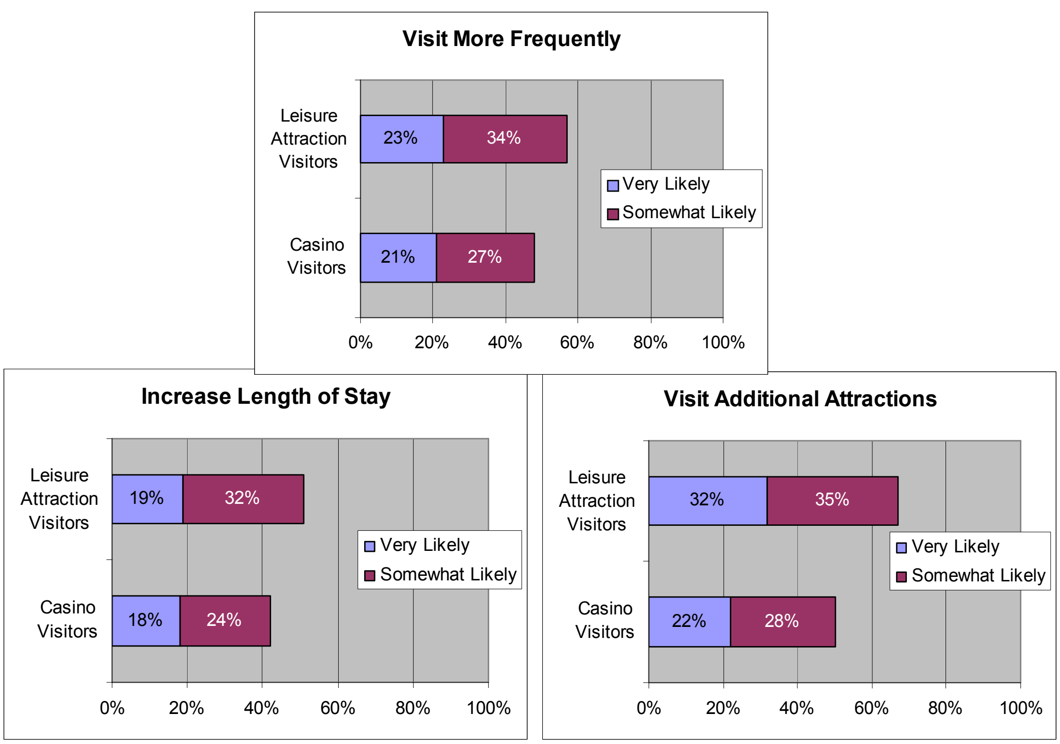
Likely Impacts

The survey also asked a series of questions designed to gauge the potential impacts associated with improved transit service in the region. Although there are some limitations regarding this data due to sample sizes, the survey responses strongly suggest the addition of a visitor oriented intermodal transit system would benefit the existing casinos and attractions. The survey revealed that:

- Just over half of all respondents would be likely to visit more frequently, of which just over a fifth of casino and leisure attraction visitors combined would be very likely.
- Just under half of casino and leisure attraction visitors combined would be likely to stay longer, of which nearly one-fifth would be very likely.
- Nearly two-thirds of casino and leisure attraction visitors combined would be likely to visit additional attractions, of which nearly a third would be very likely.
- Among the respondents who are likely to use the circulator service, they are strongly likely to visit additional attractions (85%), and to visit more frequently (75%), and they are likely to extend their length of stay (66%).

These responses suggest that improved visitor-oriented transit service in the region would benefit existing attractions by increasing repeat and cross-visitation. Figure 3.4-4 summarizes these results.

Figure 3.4-4: Likely Impacts of Improved Transit Service:



3.4.2 A Closer Look at Casino & Leisure Attraction Visitors

Because the characteristics of the casino and leisure attraction visitors are quite distinct, these markets were further subdivided to analyze how these sub-segments might respond differently to the proposed transit alternatives. Specifically, each of these market segments was further evaluated according to whether the respondents indicated they were daytrip or overnight visitors. The findings are summarized in the following section.

Casino Visitors

A comparison of daytrip and overnight casino visitors reveals that overnight visitors responded more positively to using transit alternatives, primarily a circulator service. As Table 3.4-2 illustrates, overnight visitors were more likely to indicate that they would visit more frequently, stay longer, and visit more attractions during their visit. It should be noted that because of the relatively small sample size, it was not possible to conduct a statistically significant evaluation contrasting the segments of “very likely” and “somewhat likely” responses.

The characteristics of the overnight casino visitors are slightly different from daytrip casino visitors. A higher percentage of overnight visitors were traveling in large groups with six or more people. They also tended to be slightly younger, more likely to be traveling with kids, slightly more affluent, and to visit less frequently. The survey also revealed that overall casino visitors were less likely to visit other attractions in the region as compared to leisure attraction visitors.

Table 3.4-2: Characteristics of Daytrip & Overnight Casino Visitors

	Daytrip	**Overnight**
Frequency of Visit	52% 7+ visits annually	44% 7+ visits annually
Use circulator	43.4% likely	62% likely
Use rail/ferry shuttle	39.3% likely	48.5% likely
Use airport shuttle	26.8% likely	33.0% likely
Visit more frequently	42.8% likely	54.5% likely
Stay longer	35.9% likely	50.5% likely
Visit other attractions	46.3% likely	55.8% likely

Leisure Attraction Visitors

The majority of both daytrip and overnight leisure visitors responded very favorably to a circulator service, somewhat favorably to a rail/ferry shuttle, and unfavorably to an airport shuttle. A comparison of daytrip and overnight leisure visitors reveals that overnight visitors responded more positively to using transit alternatives, primarily a circulator service. As Table 3.4-3 illustrates, allowing for a margin of error, overnight and daytrip leisure attraction visitors were equally likely to indicate that they would visit more frequently, stay longer, and visit more attractions during their visit if the tourist transit system were available. It should be noted that because of the relatively small sample size, it was not possible to conduct a statistically significant evaluation according to "very likely" and "somewhat likely" responses.

The characteristics of the overnight visitors are slightly different from daytrip leisure attractions visitors. The overnight visitors included more couples, while the daytrip segment included a higher percentage of groups (6+ people per travel party). The overnight visitors were less likely to be traveling with kids, were slightly more affluent, and visited less frequently. These characteristics suggest that a noticeable segment of the overnight leisure travelers were couples on a weekend getaway.

Table 3.4-3: Characteristics of Daytrip & Overnight Leisure Attraction Visitors

	Daytrip	**Overnight**
Frequency of Visit	31.1% 7+ visits annually	47.0% 1 visit annually
Use circulator	64.3% likely	70.4% likely
Use rail/ferry shuttle	49.1% likely	60.8% likely
Use airport shuttle	36.3% likely	32.8% likely
Visit more frequently	59.1% likely	56.2% likely
Stay longer	47.8% likely	52.3% likely
Visit other attractions	65.2% likely	67.2% likely

3.4.3 Web Site Survey

An abbreviated version of the intercept survey was posted on the Mystic & More! web site in late August. Over the course of two months a total of 266 responses were received. Because there was no control over the sample, the internet survey is not statistically valid. Nevertheless, the internet survey suggests that among forty percent of respondents the availability of transportation other than a personal vehicle is an important factor in choosing to visit southeastern Connecticut. Also, these respondents were overwhelmingly interested in visiting the region's leisure attractions. For the purposes of looking at overall demand, the internet survey reinforces the findings of the tourist intercept survey, and provides another strong indicator of the potential for a visitor-oriented intermodal transit system in southeastern Connecticut.

3.4.4 Summary

The results of the survey reveal that there is interest in visitor-oriented transit services, particularly a circulator service, which received the most positive responses. There is somewhat less demand for the connecting services, primarily for a service that would link rail and ferry terminals with attractions and lodging in the region, as opposed to airports. Moreover, people who visit most frequently demonstrated the greatest interest in the connector services. Percentage wise, leisure attraction visitors and overnight visitors were most enthusiastic about transit. However, because of the sheer volume of casino visitors, this market represents the largest potential pool of users for a visitor-oriented transit system.

3.5 POTENTIAL USERS

Considering the information gleaned from the survey, and the size and characteristics of the markets available to support transit alternatives in southeastern Connecticut, an estimate of the pool of potential users was developed for the most popular option—a circulator service. The methodology used to identify the number of potential circulator shuttle users is described below and shown in Table 3.5-1.

To begin, the number of casino and leisure attraction visitors was defined based upon reported attendance figures. For each of these market segments the percentage of visitors who visit other attractions was identified, based upon the findings of the intercept survey, and applied to the existing markets to quantify the cross-visitation market. The intercept survey was conducted in the Summer during peak family travel season, which resulted in a larger than typical share of casino visitors who were in the region and also visiting other attractions—an atypical pattern during the rest of the year. To account for this, the segment of the casino market that visits other attractions was discounted by one third to provide a more realistic order of magnitude of casino visitors who would potentially use a circulator service to visit other attractions in the region.

From these segments of casino and leisure attraction visitors, those who would be very likely and somewhat likely to use the circulator service were identified in order to develop an order of magnitude range of potential circulator shuttle users.

By applying the methodology outlined above, the analysis revealed that the potential pool of users among casino visitors ranges from 1.2 to 2.6 million visitors. The pool of potential users among leisure attraction visitors is smaller and ranges from 500,000 to 900,000 visitors. Altogether, this represents a base of potential circulator shuttle users between 1.7 million to 3.5 million visitors. In viewing these numbers, the reader is cautioned that, as mentioned previously, survey respondents tend to overstate positive responses and understate negative responses. However, while acknowledging this tendency, the market of potential users is so large that a discounted user rate would still yield a significant pool of potential users for an intermodal transportation service in southeastern Connecticut.

Table 3.5-1: Estimate of Pool of Potential Circulator Users

Total Casino Visitors	25,370,000	
Percent of Casino Visitors Visiting Other Attractions	20%	
Casino Visitors Visiting Other Attractions	5,119,615	
Percent Very Likely to Use Circulator	24%	
Percent Likely to Use Circulator	51%	
Casino Visitors Very Likely to Use Circulator	1,219,000	Low
Casino Visitors Likely to Use Circulator	2,627,000	High
Estimated Pool of Circulator Users - Casino Visitors	**1.2 - 2.6 million**	
Mystic Aquarium Visitors	820,000	
Mystic Seaport	350,000	
U.S.S. Nautilus and Submarine Force Museum	250,000	
Mashantucket Pequot Museum & Research Center	242,000	
Total	1,662,000	
Percent of Leisure Attraction Visitors Visiting Other Attractions	63%	
Museum Visitors Visiting Other Attractions	1,042,074	
Percent Very Likely to Use Circulator	36%	
Percent Likely to Use Circulator	69%	
Attractions Visitors Very Likely to Use Circulator	462,500	Low
Attractions Visitors Likely to Use Circulator	897,500	High
Estimated Pool of Potential Circulator Users - Attractions Visitors	**0.5 - .9 million**	
Pool of Potential Circulator Users		
Very Likely	**1,681,500**	
All Likely	**3,525,000**	