



D.K. Shifflet & Associates Ltd.

Excellence in Travel Intelligence®

2011 NEW JERSEY OVERNIGHT LEISURE VISITOR PROFILE

Editorial

Travel Year 2011 in Review

Charts & Graphs

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Fiscal Year 2011 Visitor Profile

*An Inside Look at the Overnight Leisure
Travel Market in New Jersey*

Cheryl Schutz

Vice President, Destination Intelligence

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Introduction

This New Jersey **Overnight Leisure Visitor Profile** provides intelligence on U.S. and New Jersey travel trends from Fiscal Year 2011. Information is also provided for five competitive states which draw visitors from the same origin markets as New Jersey. These include New York, Pennsylvania, Maryland, Virginia and North Carolina.

Atlantic City is an iconic destination within the State of New Jersey that typically attracts approximately one-third of all visitors to the State. Although the state should be considered as a whole, Atlantic City's unique

*In 2011 New Jersey hosted a total...
80 Million visitors spending....
\$17 Billion dollars*

offerings suggest there may be value in looking at the State data excluding Atlantic City. Thus, for comparison, data are presented for New Jersey in total (including Atlantic City) and for the balance of the State excluding Atlantic City.

Volume and profile data are from D. K. Shifflet & Associate's **PERFORMANCE/MonitorSM Travel Intelligence SystemSM** — the largest travel-tracking system in the U.S. The 2011 New Jersey Overnight Leisure Visitor Profile is based on a sample of 1,112 traveling households. Data are based on a fiscal year comprised of fourth quarter 2010 through third quarter 2011. DKSA finalizes, and makes all quarterly data adjustments, after data collection for the fourth quarter of the year. Therefore fiscal year 2011 data is considered 'partial' meaning that it is subject to year end 2011 adjustments. These adjustments are reflected in the subsequent year's Visitor Profile report.

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Executive Summary

This report, like previous reports, compares New Jersey to the competitive states of New York, Pennsylvania, Maryland, Virginia and North Carolina. Data are also analyzed for two New Jersey geographies — primarily, the State as a whole and secondarily as the State excluding Atlantic City.

The economic climate over the past few years has created challenges for most states resulting in decreased travel and the associated declines in spending in their cities and destinations. This trend started to change in 2010 and has continued into 2011. For the second consecutive year the average U.S. destination has experienced positive growth in visitation. New Jersey is no exception, experiencing not only growth in visitation and

spending, but also in market share as did North Carolina and New York, the only three states in the competitive set to gain share of Overnight Leisure travel.

Increases in spending by New Jersey visitors are keeping pace with the average destination. In fact, in 2011 the increase in spending for New Jersey exceeds that of the average destination. This appears to be due to an increase in visitation to the Greater Atlantic City region.

Prior to 2007, the Greater Atlantic City region boasted an over 55% share of New Jersey's travel. This share has been redistributed to other regions of the State and now stands at 39%.

Fiscal Year 2011 Highlights:

- Double digit increases in Overnight Leisure Visitor Volume and in Spending
- Largest number of visitors since at least 2006 and highest amount of spending since 2007
- Most visitor gains are in regions other than Atlantic City, but
- Greater Atlantic City region hosts more Overnight Leisure Visitors than Gateway and Southern Shore regions combined
- Gambling participation reverses direction showing first increase in 5 years
- New Jersey, New York and North Carolina only states in competitive set gaining Overnight Leisure Market Share
- New Jersey and all competitive states received Excellent Destination Satisfaction ratings
- Compared to its competition, New Jersey visitors are older and have higher incomes
- General vacation overtakes Weekend Getaway as primary purpose of visit to New Jersey
- New York surpasses New Jersey as number one origin for New Jersey travel

STUDY SPECIFICATIONS

Travel definition: Any overnight trip or any day-trip greater than 50 miles one-way from home.

Sample Frame: All U.S. domestic Overnight Leisure travelers during 2011 in New Jersey.

Timeframe: Fiscal Year 2011 (Q4 2010 – Q3 2011)



Executive Summary

The characteristics of those visiting New Jersey may help explain why some of these shifts are occurring. New Jersey tends to host travelers that are either visiting for gaming and entertainment trips or for longer family vacations. The impact of changes in travel behavior by either group can have a large impact on the types of accommodations that are used, the activities engaged in and ultimately the money spent in the State.

The average overnight visitor to the State has a median household income of just over, \$91,000, almost \$20,000 more than visitors to the average destination and about \$12,000 more than visitors to the competitive set. Incomes of those visiting the State excluding Atlantic City are even higher, approaching almost \$97,000.

While these higher income travelers make up about 60% of all travel to the State, they are more likely to stay with friends and relatives than are visitors to the State as a whole, thus their per-person-per-day spending is about \$26 less than for the State as a whole. But, when they do stay in paid accommodations they tend to stay in higher end properties and their stays are longer.

Conversely, while visitors to the Atlantic City region don't stay as long and have lower household incomes they tend to spend more on a per-person-per-day basis. This is because they are staying in paid accommodations and are engaging in more expensive activities. The down side is these folks tend to stay in economy accommodations.

Similar to the average destination and the competitive set, two-thirds of New Jersey's visitors are employed. Although employment among travelers continued to decline nationwide, travel continued to grow in

New Jersey. This coupled with the increased incomes of travelers is an indication that what New Jersey has to offer is attractive to the more affluent traveler. This may be particularly true for those visiting regions of the State other than Atlantic City and those with families.

In fact, the percentage of travelers in the Affluent Family Lifestage grew at a faster pace than any other Lifestage in 2011. While, in general, visitors in family Lifestages are more fiscally valuable, those in the Affluent Family Lifestage account for a high share of dollars spent in New Jersey.

Some of the shift toward higher income visitors may be due to a shift in the origin of New Jersey visitors. For the first time New York supplies more visitors to New Jersey than does the State itself. Travelers are traveling longer distances to New Jersey and are staying longer.

The activities people engage in while visiting New Jersey are also shifting. In 2010 gambling was the fourth listed activity for the State and in 2011 it has moved up to number three. This is very good news for the State, particularly considering that nationwide gambling is a declining activity. Although displacing entertainment, beach/waterfront has moved up to the number two activity in the State — it is number one if Atlantic City is excluded from the analysis.

In summary, New Jersey seems to be in a state of recovery. It's visitors are coming back and spending money, some people are trading up to the State's high end hotels and the signature activities are back on top.

Visitor Volume and Spending

In Fiscal Year 2011 New Jersey hosted almost 80 million visitors, spending approximately \$16.6 billion while visiting the State.

Led by a return of leisure visitors, the State experienced double digit growth in both visitor volume and spending in 2011. This was the first increase in visitor spending since 2007.

For the second consecutive year, New Jersey's increase in total visitation is greater than the U.S. average. In fact, New Jersey's growth in overnight leisure visitation is almost double that of the average U.S. destination.

Overall, New Jersey visitor spending still trails behind the U.S. average. However those visiting New Jersey for an overnight leisure stay are spending more than is being spent in other destinations for similar trips, indicating that those visiting for day trips spend less money in New Jersey than they do in other destinations. New Jersey tends to host slightly more day trips than does the average U.S. destination.

After remaining fairly flat in 2008 and 2009, the number who visit the State for overnight leisure jumped by over 17% representing a total of over 32 million visitors. While spending for this cohort has been slower to recover than for the average destination, the 2011 increases at 16.3% exceed the average destination by approximately 4 percentage points.

Total

PERSON-STAYS (millions) / DOLLARS (billions)



Overnight Leisure

PERSON-STAYS (millions) / DOLLARS (billions)



80 Million Visitors — ↑14.8%

\$17 Billion Dollars — ↑11.3%

GLOSSARY

Stays: the number of destinations visited on a trip by a unique group of travelers, regardless of the number of people within the travel group

Person-Stays: the total number of people who visited your destination, regardless of how long they stayed

Note: Fiscal Year volume and spending figures subject to change due to year-end 2011 quarterly adjustments

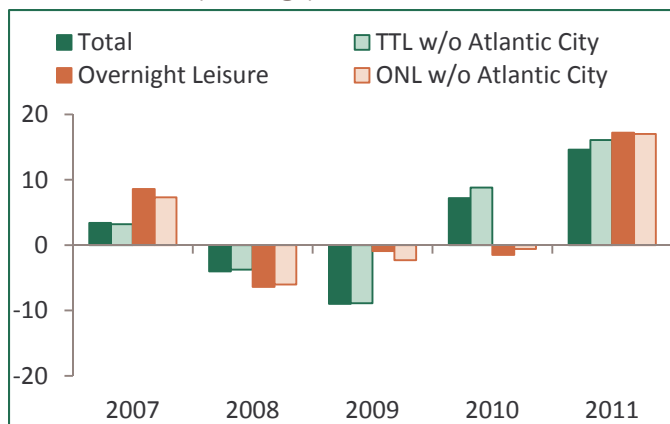
Visitor Volume and Spending

The lag for New Jersey may be due to a couple of factors. First, in general, business and leisure travel are contributing almost equally to the growth in U.S. visitor volume, but business spending has increased at more than twice the rate of visitation, and for the average destination, accounts for about one-third of all spending. For New Jersey, business travel accounts for only about 20% of both visitors and spending, thus increases in business travel have much less impact in New Jersey than in other destinations.

Another factor has been a the steeper decline and slower recovery of the Atlantic City region as compared to the rest of the State. The charts on this page show trends for New Jersey in total and for the State when Atlantic City is excluded from the analysis.

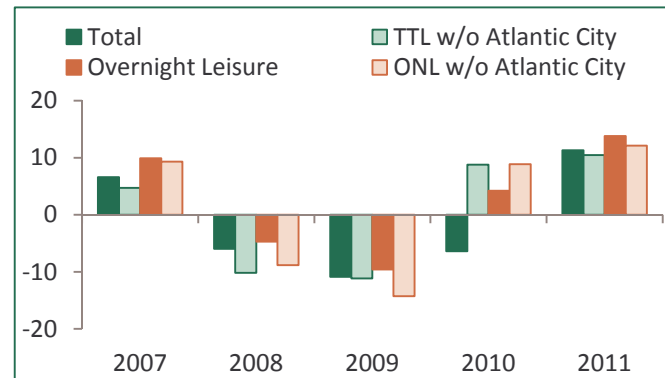
Visitor Volume

PERSON-STAYS (% change)



Visitor Spending

SPENDING (% change)



Historically changes in visitation, particularly positive changes have been of a greater magnitude for the State as a whole than for the State without Atlantic City. Changes in spending, however have been more mixed. Positive changes were more positive for the State as a whole and negative changes were even more negative when Atlantic City was excluded from the analysis. This is largely due to demographic and behavioral differences between people visiting Atlantic City and those visiting other parts of the State. These differences will be discussed later in this report.

These trends started to change in 2009 and continued into 2010 and 2011. Those visiting other parts of the State represent just over two-thirds of all Person-Stays to New Jersey, thus their impact is significant.

Overnight Leisure Visitors

They're back — ↑ 17.2%

Overnight Leisure Spending

They're spending — ↑ 13.8%

Visitor Volume and Spending

In 2011 New Jersey's total visitation grew at a faster pace for the State if Atlantic City were excluded than for State as a whole. This is not true when only Overnight Leisure visitation is considered. In this case growth was similar regardless of whether or not Atlantic City is included, indicating that Atlantic City is experiencing some recovery.

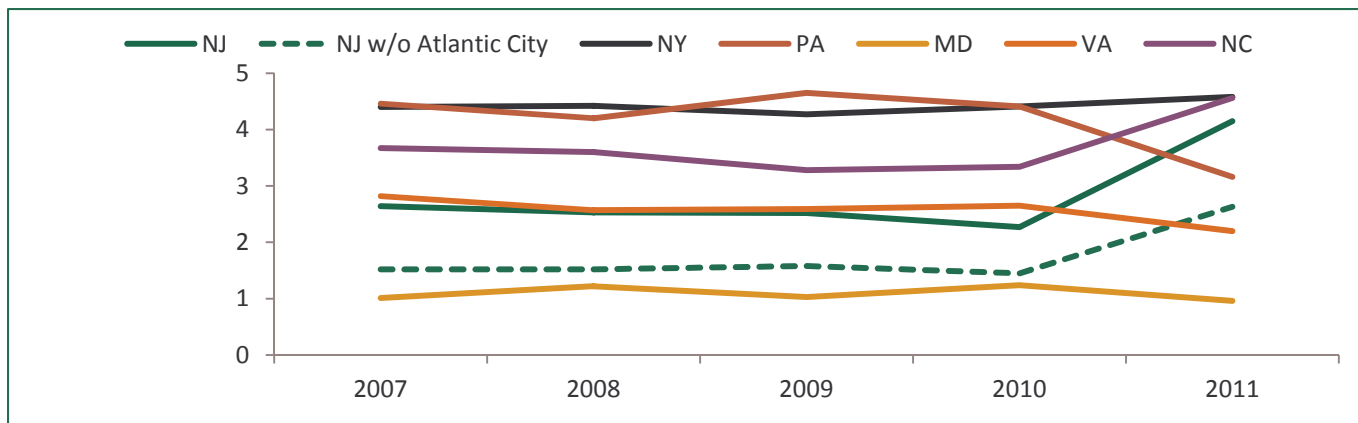
Spending is even more pronounced. While total spending follows the same positive trend as total visitation, Overnight Leisure spending increased at a greater rate for the State when Atlantic City is included indicating that spending has increased in Atlantic

City.

This positive growth for New Jersey is further evidenced in its increased market share particularly as compared to competitive states. Market share lost by Pennsylvania, Virginia and Maryland seems to be picked up primarily by New Jersey and North Carolina. Although Atlantic City is the largest contributor to the increase in New Jersey's market share, increased visitation to all parts of the State has had a positive impact.

Market Share

OVERNIGHT LEISURE PERSON-STAYS



Increase in Market Share -
Atlantic City contribution
more than balance of State

Demographics

Who are New Jersey's visitors?

New Jersey's Overnight Leisure Visitors tend to be slightly older and have higher incomes than visitors to average U.S. destination or to the competitive set.

New Jersey considered without Atlantic City differs from the State as a whole in that visitors are more likely to be employed, have higher household incomes and are more likely to have children living in their household.

New Jersey, in either analysis (with or without Atlantic City), is more likely to host GenX travelers than either the average U.S.

destination or its competitive set. This is particularly impacted by high GenX visitation to regions other than Atlantic City. In contrast to 2010, during which New Jersey hosted the largest share of Boomers, New Jersey's 2011 Boomer travelers were similar to the average U.S. destination as well as to the competitive set.

How do New Jersey's visitors compare?

	New Jersey	New Jersey w/o Atlantic City	Average U.S. Destination	Competitive Set (NY/PA/MD/VA/NC)
Average Age (yrs.)	48	47	46	46
Employed	63%	68%	64%	65%
Retired	15%	11%	15%	14%
Median Income (000)	\$91.1	\$96.8	\$70.9	\$78.9
Children in HH	38%	42%	38%	38%
Generations:				
Millennial	15%	16%	20%	21%
GenX	36%	39%	33%	31%
Boomer	36%	34%	34%	36%
Silent/GI	13%	11%	14%	12%

New Jersey Visitors:
Older
Employed
Higher Income
No Kids in Household

GLOSSARY

Generations: Millennial – 1981-1996; GenX – 1965-1980; Boomer 1946-1964; Silent/GI – before 1945

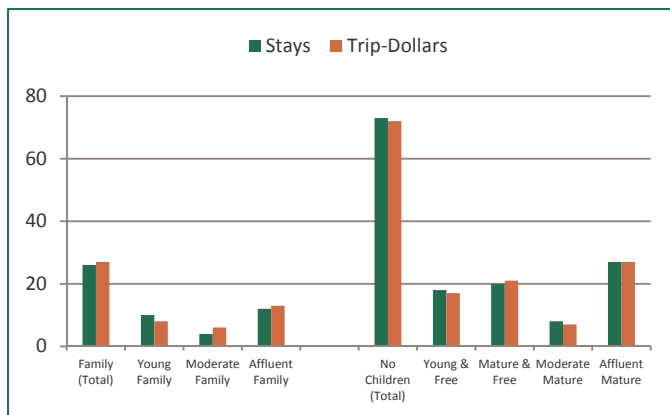
Demographics

DKSA combines the three variables most likely to discriminate between travelers into seven Lifestages. These include age, household income and whether or not children are present in the household. These segments are generally used for promotion development and targeting.

For New Jersey, with and without Atlantic City included, visitors are more likely to belong to Lifestages with no children in the household. It is important to notice, however that because the share of Trip Dollars is less than the share of Stays these Lifestages are the least profitable for the State. Driven by the Moderate Family and Affluent Family Lifestages, the combined family Lifestages, particularly for the State excluding the Atlantic City, are the most profitable.

New Jersey

OVERNIGHT LEISURE STAYS (2009-2011)

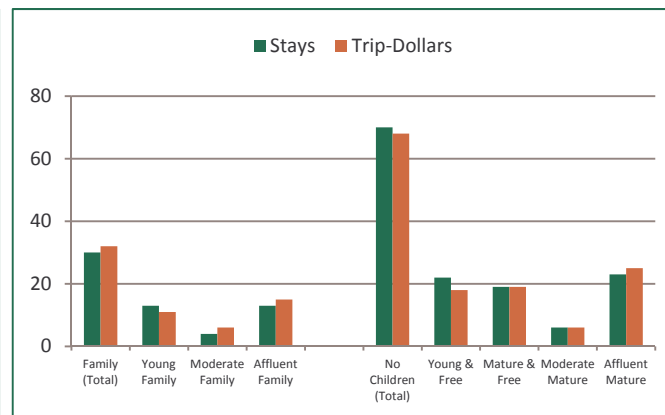


DKSA Lifestage Definitions

Lifestage	Head of HH Age (years)	HH Income	Children <18 in HH
Young & Free	18-34	Any	No
Young Family	18-34	Any	Yes
Mature & Free	35-54	Any	No
Moderate Family	35-54	Under \$75K	Yes
Affluent Family	35-54	\$75K+	Yes
Moderate Mature	55+	Under \$60K	No
Affluent Mature	55+	\$60K+	No

New Jersey without Atlantic City

OVERNIGHT LEISURE STAYS (2009-2011)



Family Lifestages:
Most profitable
Least visitation

GLOSSARY

Trip Dollars: A comparison of Trip-Dollars (Direct Spending) to Stays allows for the analysis of the financial contribution a certain segment of travelers makes to a destination

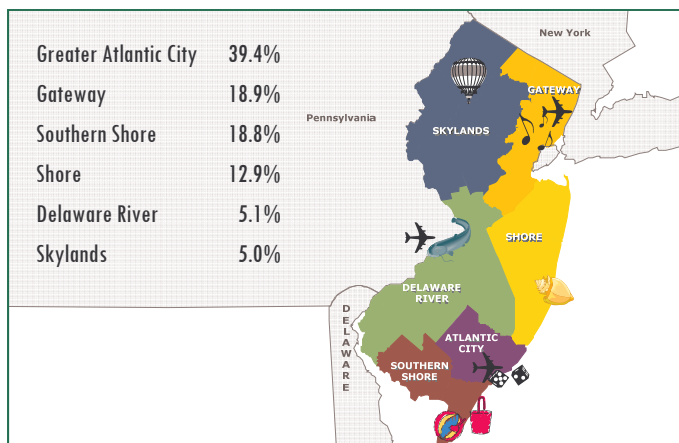
Where do New Jersey's visitors come from?

More than 3 out of 4 New Jersey visitors come from 7 states with about 20% coming from New Jersey itself and an additional 40% coming from the neighboring states of New York and Pennsylvania.

It is not surprising then that almost 90% of travel to New Jersey is by auto and that the average one-way distance traveled is about 400 miles — more than 100 miles *less* than the to the average U.S. destination and about 50 miles *less* than or to New Jersey's competitive set. Like the U.S., drive distances to New Jersey have been creeping up since 2008.

New Jersey Destination Regions

OVERNIGHT LEISURE SHARE OF PERSON-STAYS



New Jersey Origin States

OVERNIGHT LEISURE SHARE OF PERSON-STAYS

New York	25.5%
New Jersey	20.9%
Pennsylvania	15.1%
Maryland	5.3%
North Carolina	4.6%
California	3.1%
Florida	3.0%
Other	22.5%

Where do New Jersey's visitors go?

Although the Greater Atlantic City Region continues to receive the largest share of New Jersey's Overnight Leisure visitors, the share of visitation to this region has been declining since at least 2006 at which time 55% of travel to New Jersey was to the Greater Atlantic City Region.

The importance of Atlantic City to this region and to the State can not be overlooked, however. When Atlantic City is excluded from the analysis, the share of travel for this region drops to less than 2%, representing a decline of over 60% since 2007.

Except for the Delaware River and Skylands, regional share of travel has been increasing over the past couple of years.

Two-thirds of New Jersey visitors come from tri-state area

Why do travelers visit New Jersey?

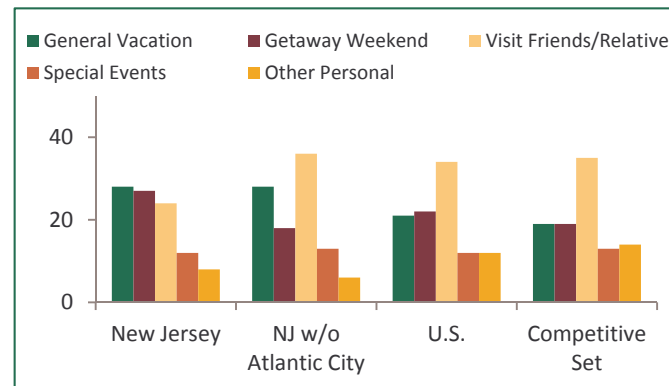
For the first time, visitors to New Jersey are doing so about equally for General Vacations as for Getaway Weekends. The reasons for visiting New Jersey, however, vary substantially depending on whether or not Atlantic City is included in the analysis.

General Vacations and Getaway Weekends each represent about 30% of all overnight leisure travel to the State and Visiting Friends and Relatives makes up about 25% of travel. If Atlantic City is excluded Getaway Weekends drop to less than 20% and Visiting Friends and Relatives jumps to 36%. The share of those taking longer vacations or attending special events is similar regardless of whether or not Atlantic City is included in the analysis. Although this pattern is similar for the average destination and for New Jersey's competitive set, it is interesting to note that New Jersey without Atlantic City hosts a much larger share of General Vacations than either the average destination or the competitive set.

The combination of increased visitation to Visit Friends and Relatives and decreased Getaway Weekend travel is reflected in the lower average spending for New Jersey without Atlantic City. Excluding entertainment and transportation, the total State is very similar to both the U.S. and the competitive set in each spending category. The higher entertainment and lower transportation make the average per-person-per-day spending in New Jersey very similar to the U.S. average and to the competitive set.

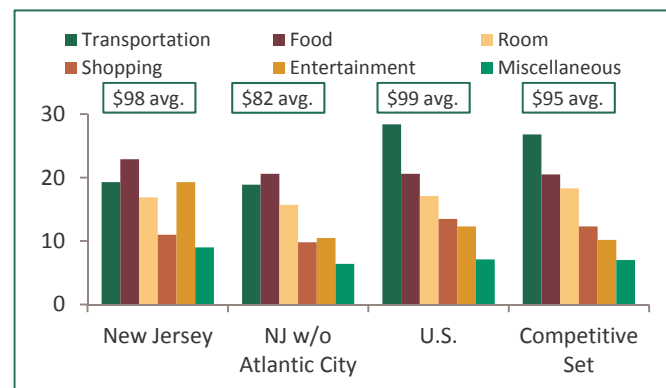
Purpose of Travel

OVERNIGHT LEISURE PERSON-STAYS



Per-Person-Per-Day Spending

OVERNIGHT LEISURE



Strong Vacation Travel

Accommodations

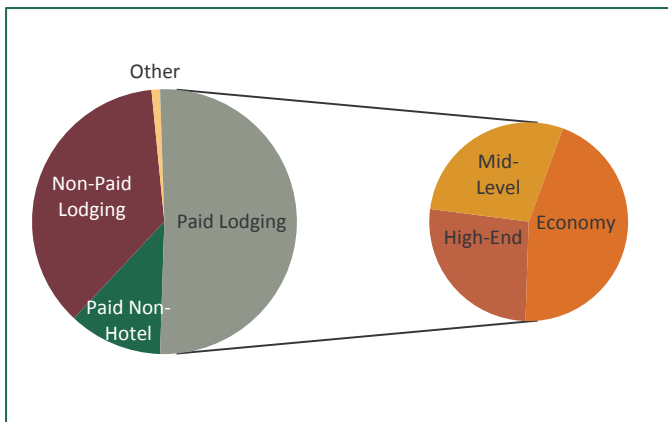
Where do New Jersey visitors stay?

When Atlantic City is excluded from the analysis the average per-person-per-day spending drops by \$16, indicating that those who visit Atlantic City are much more valuable visitors than those who visit the balance of the State. Although this makes sense because those who visit friends or relatives are less likely to spend money on food, entertainment or shopping, it should be noted however, that this is a much smaller difference than in prior years.

The daily amount spent on accommodations is only slightly less for New Jersey without Atlantic City especially considering that while 54% of visitors to the entire State stay in paid accommodations

New Jersey

OVERNIGHT LEISURE PERSON-STAYS



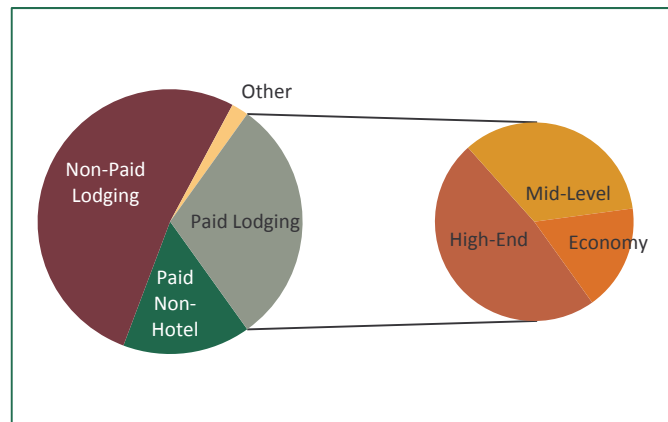
only 33% who visit the balance of the State do so. New Jersey as a whole hosts more visitors staying in paid lodging than the average U.S. destination or their competitive set.

Among those who stay in paid accommodations however, of those visiting non-Atlantic City destinations, 83% stay in high and mid-level accommodations. When Atlantic City is included, this percentage drops to 56%.

Overall, overnight leisure visitors to New Jersey stay approximately 2.7 nights, which is slightly below both the U.S. average, but similar to the competitive set. New Jersey without Atlantic City hosts longer stays at 3.18 nights. Of course the longer the stay the more valuable the visit.

New Jersey without Atlantic City

OVERNIGHT LEISURE PERSON-STAYS



Those who stay in hotels, choose Economy

What do New Jersey visitors do?

The activities people engage in while visiting New Jersey vary widely depending on whether Atlantic City is considered or not. The most obvious difference appears when looking at the top five activities engaged in by New Jersey visitors.

For the State as a whole, the top five activities are:

1. Dining
2. Beach, Waterfront
3. Gambling
4. Entertainment
5. Shopping

When considering the State excluding Atlantic City, not only does the order change, but gambling completely falls out of the top five and is replaced by sightseeing, a much less lucrative activity. In fact, gambling ranks only 12th for this portion of the State.

1. Beach, Waterfront
2. Dining
3. Entertainment
4. Shopping
5. Sightseeing

Until 2008, gambling had been the most popular activity in New Jersey. However, participation in gambling has been declining since 2006 when 40% of visitors gambled on their trips to New Jersey. Although the percentage of visitors coming to gamble is still below the 2006 high, 2011 did show an 8% increase to 32%.

In a recent generational analysis¹ of DKSA data it was noted that the younger generations, Millennials and GenXers, are much less interested in activities like gambling than were the generations before them. In fact, the trend for these groups is toward more family oriented, outdoor and cultural activities.

Even so, visitors who engage in any type of activity are more valuable than those who do not. Regardless of the activity they participate in on their trip, they represent a higher level of spending than they do visitation. Travel parties spending the most on their trips to New Jersey are visiting amusement parks, shopping, being entertained, and dining out.

Gambling ↑
Beach, Waterfront ↑
Other activities ↑↓

¹How Generations Travel – presented at 2010 TTRA in San Antonio, Texas

Satisfaction and Value

How do New Jersey visitors rate the State?

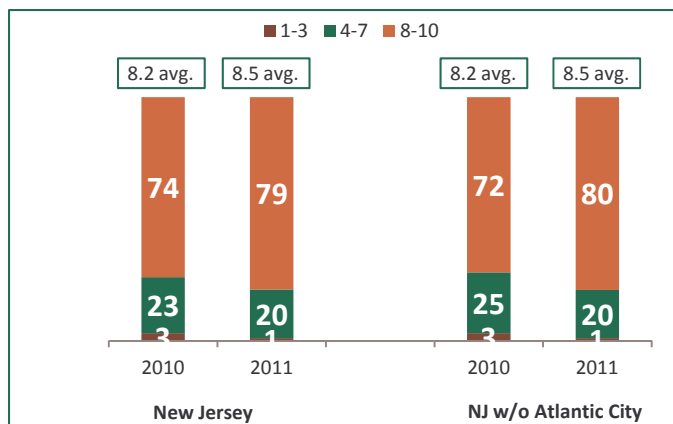
Respondents are asked to rate their overall Satisfaction with the destinations they visit as well as the overall Value for the Money the destination provides. Ratings are on a 10-point scale, where 1 is low or 'poor' and 10 is high or 'excellent'.

New Jersey as well as its competitors have consistently received a high percentage of Excellent (8-10) ratings for overall Satisfaction with the destination. In fact, in 2011 all competitive states achieved average ratings of between 8.2 and 8.6, similar to the average U.S. destination.

Excellent Satisfaction ratings reached the highest levels in 2011, while poor ratings were almost non-existent.

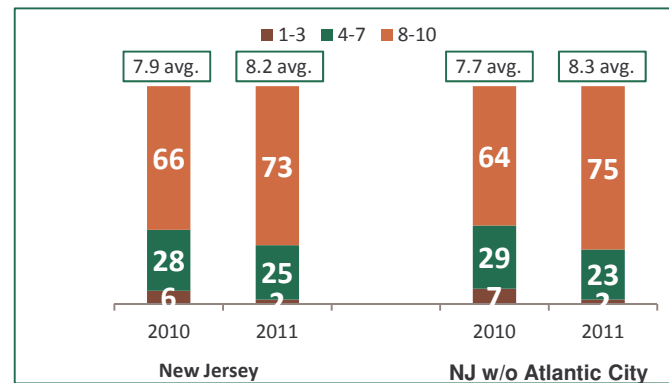
Overall Satisfaction

OVERNIGHT LEISURE PERSON-STAYS



Value for the Money

OVERNIGHT LEISURE PERSON-STAYS



While Value for the Money is not rated quite as high as Satisfaction, all averages trended up slightly in 2011. Excellent ratings for Both Satisfaction and Value for the Money increased substantially for the State as a whole, and for the State when Atlantic City is excluded from the analysis.

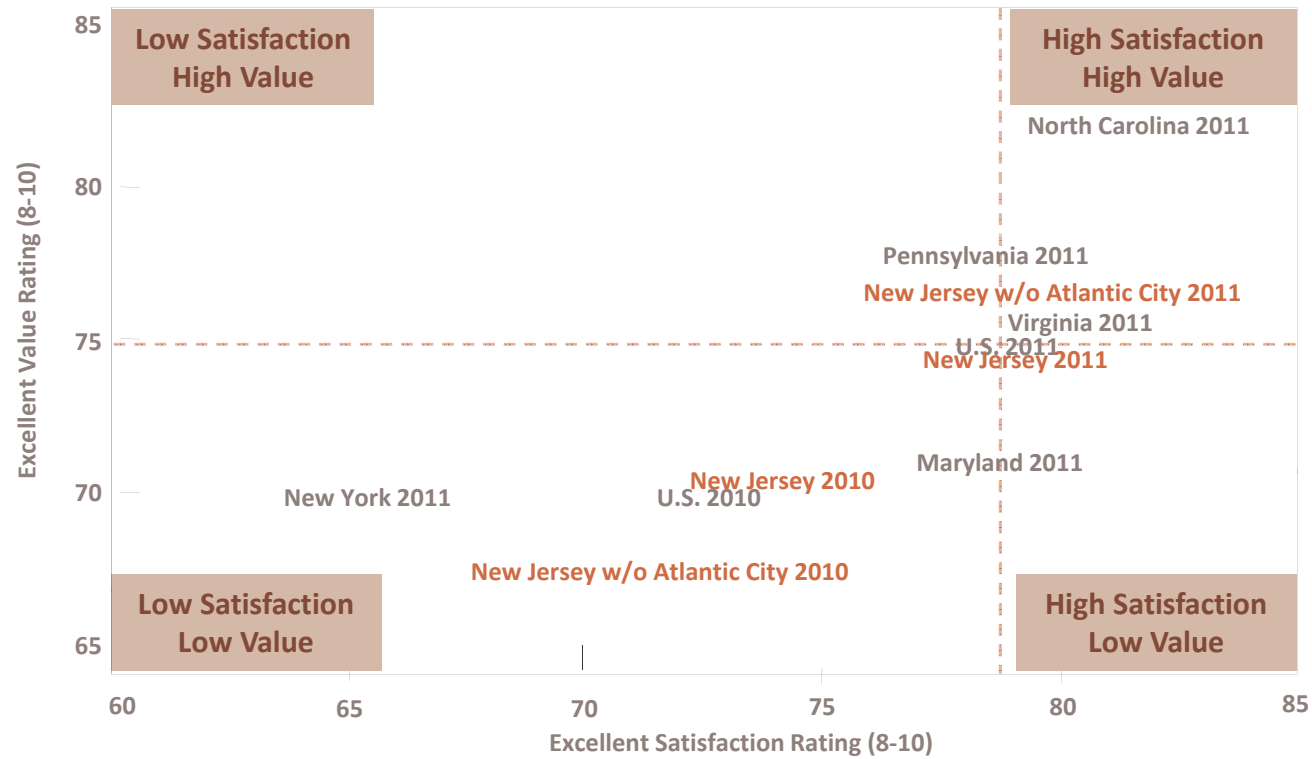
These data may be combined into a matrix which places each destination in the location where Satisfaction and Value intersect. Destinations fall into one of four quadrants. Those that are in the High Satisfaction, High Value quadrant have the most loyal visitors. Those visitors are most likely not only to return, but they are likely to spend more, as well as provide invaluable word-of-mouth recommendations. The graph on the next page shows these data for New Jersey, the U.S. average, and New Jersey's competitors.

High levels of
Satisfaction
Value

Satisfaction and Value

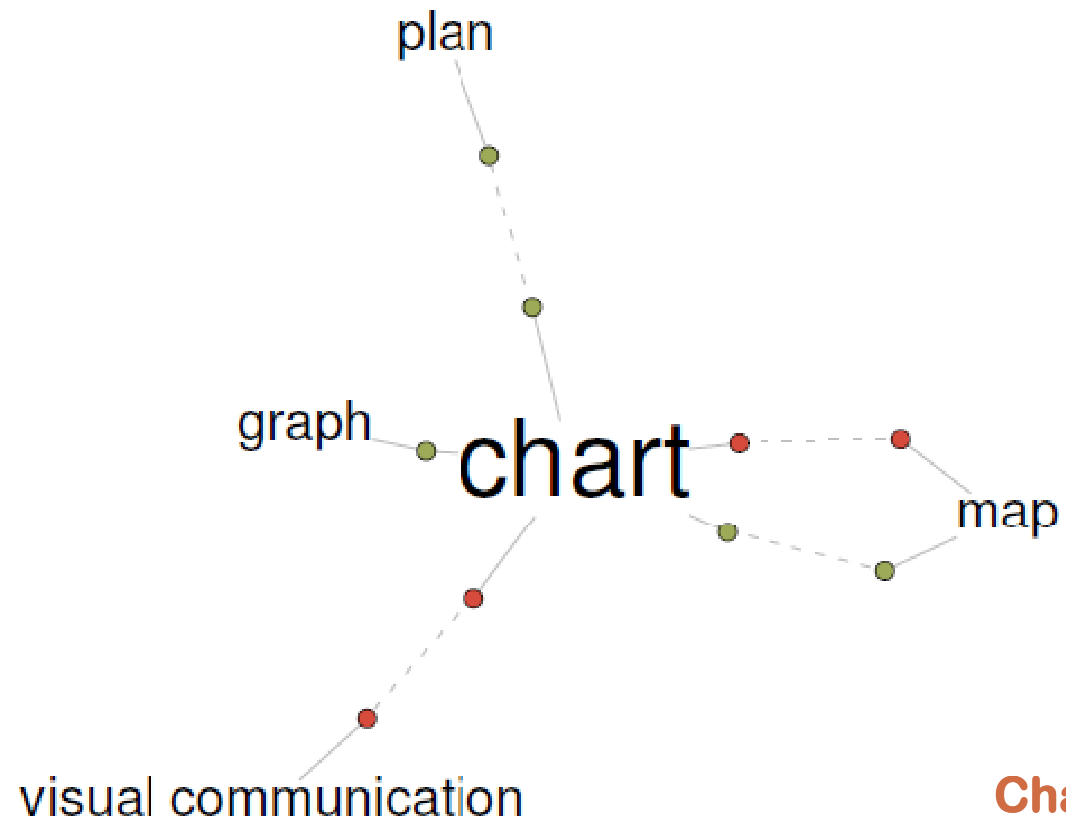
Overnight Leisure

EXCELLENT RATINGS PERSON-STAYS



Satisfaction ↑

Value for the Money ↑



Charts and Graphs

New Jersey Fiscal Year-End 2011 Visitor Profile

U.S. Travel Segments

VOLUME

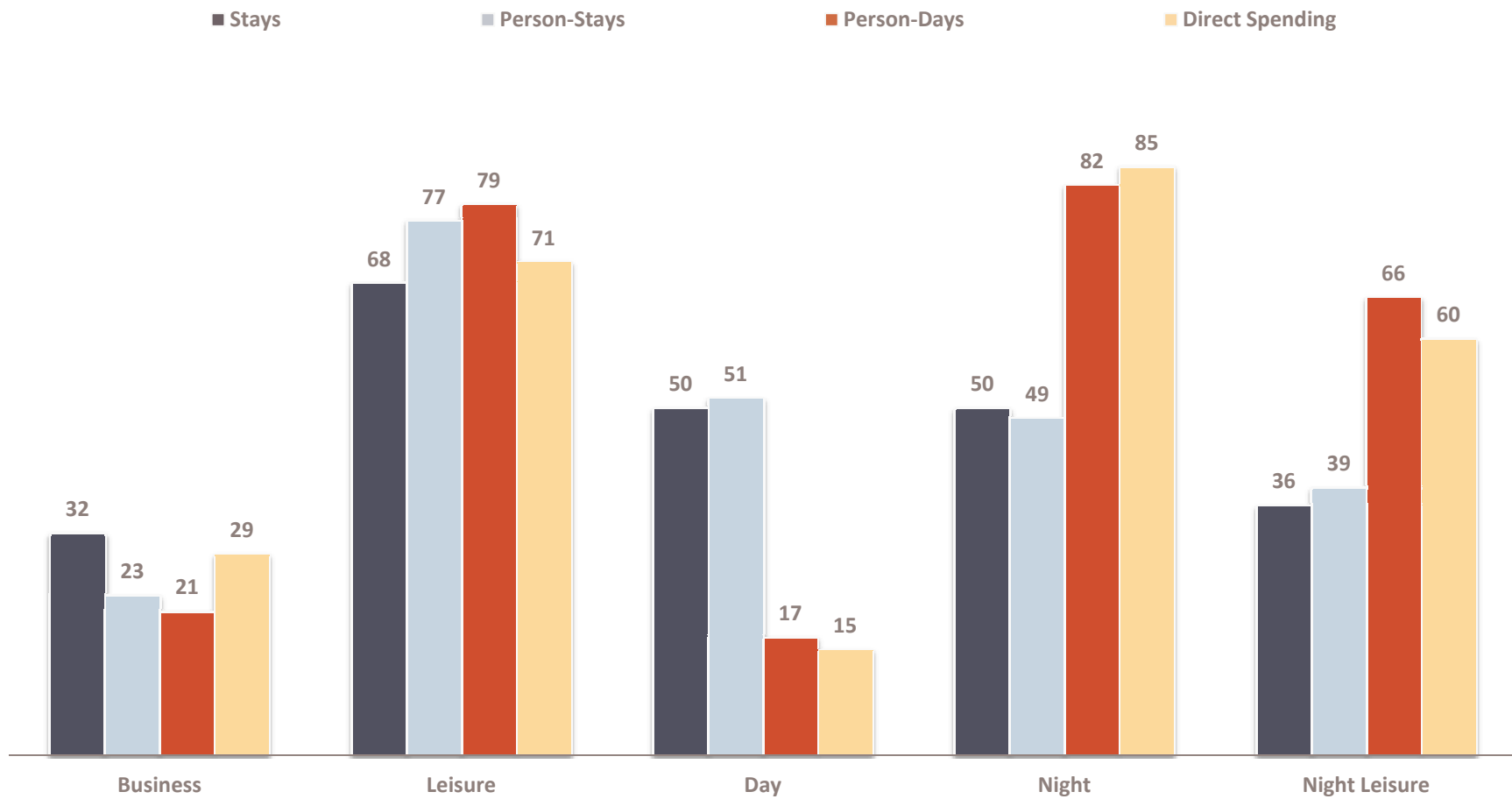
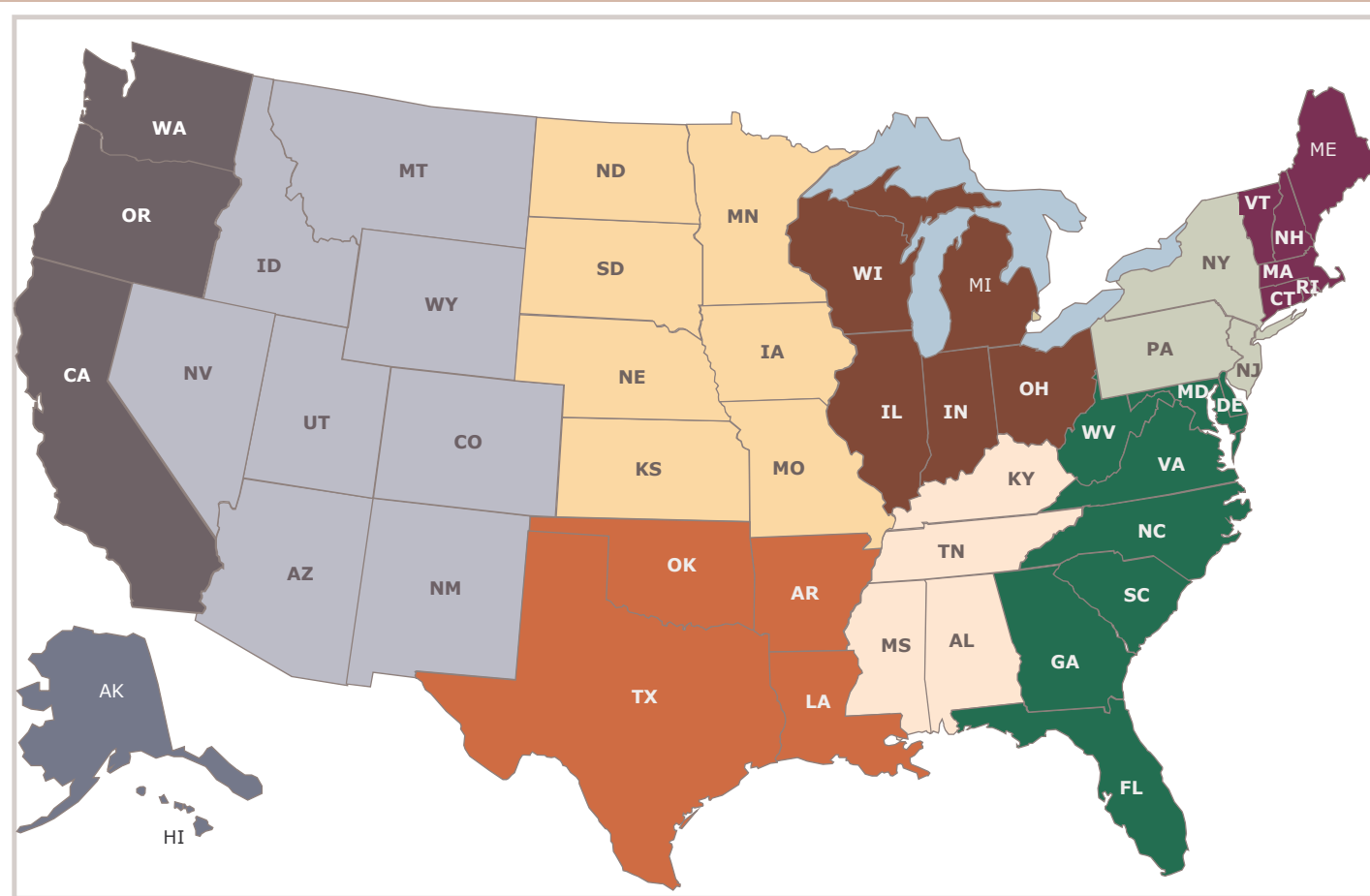


Chart 1 • Segment: 2011 Total Volume (%)

U.S. Travel Volume Change by Division



VOLUME

LEGEND

Pacific	6.9%
Mountain	10.4%
West North Central	9.8%
West South Central	-7.6%
East North Central	18.2%
East South Central	12.2%
New England	-11.3%
Middle Atlantic	13.9%
South Atlantic	12.0%

Chart 2 • Segment: 2010/2011 Overnight Leisure Person-Stays (%)

New Jersey Person-Stays Volume

VOLUME

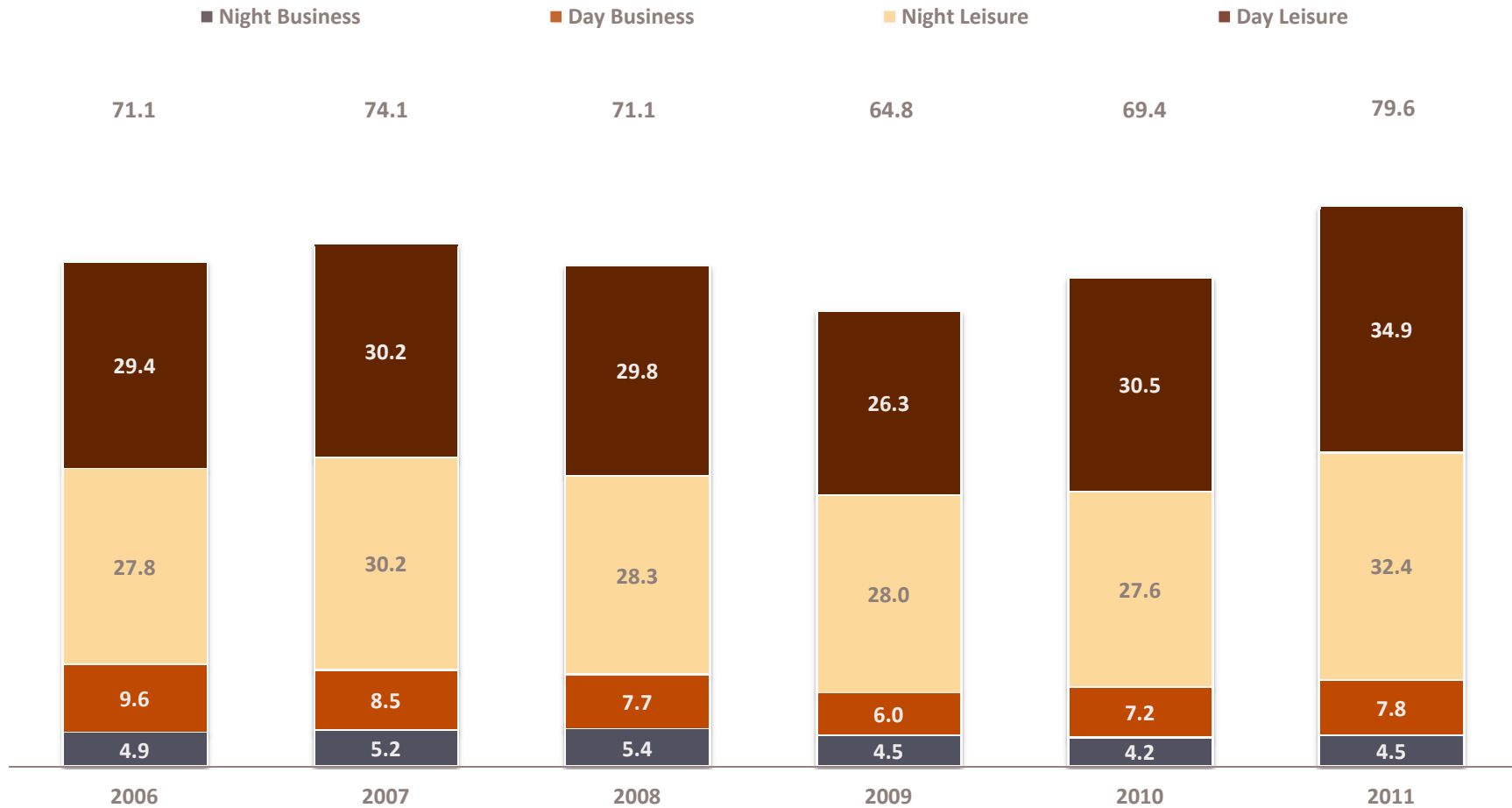


Chart 3 • in Millions

New Jersey Person-Stays Volume

VOLUME

	New Jersey					U.S.
	07/06	08/07	09/08	10/09	11/10	11/10
Total	3.4%	-4.0%	-9.0%	7.2%	14.6%	10.5%
Business	-5.3%	-4.9%	-19.7%	8.4%	8.1%	11.7%
Leisure	5.6%	-3.8%	-6.6%	7.0%	15.8%	10.2%
Day	-0.7%	-3.1%	-14.0%	16.7%	13.5%	12.1%
Night	8.3%	-5.0%	-3.4%	-2.1%	15.8%	8.9%
Day Business	-11.3%	-9.8%	-21.8%	19.1%	8.9%	13.4%
Day Leisure	2.8%	-1.2%	-11.9%	16.1%	14.5%	11.7%
Night Business	6.7%	3.1%	-16.7%	-6.1%	6.6%	9.6%
Night Leisure	8.6%	-6.4%	-0.9%	-1.5%	17.2%	8.8%

Chart 4 • % change

New Jersey Direct Spending Volume

DIRECT SPENDING

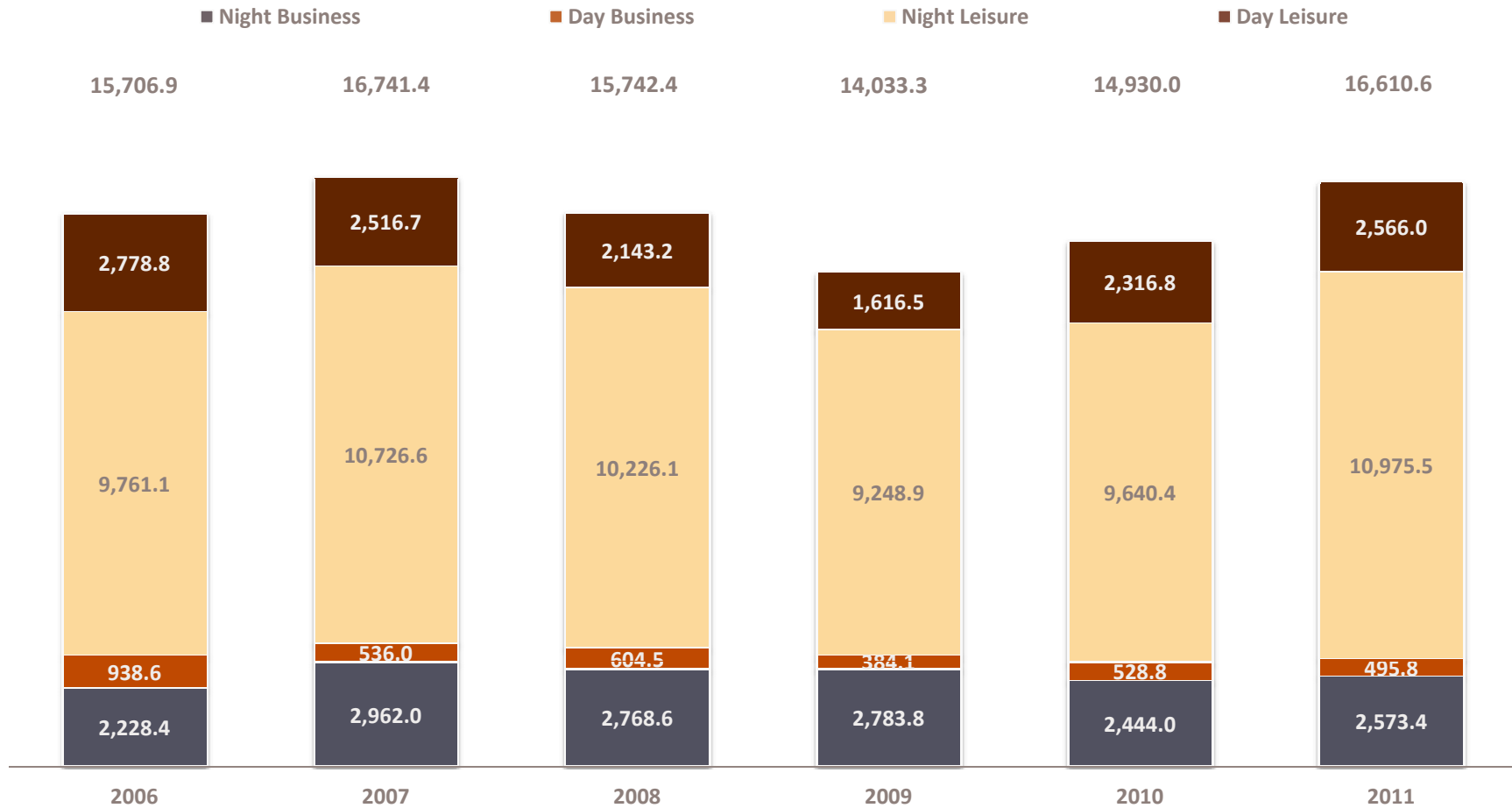


Chart 5 • \$ Millions

New Jersey Direct Spending Volume

DIRECT SPENDING

New Jersey						U.S.
	07/06	08/07	09/08	10/09	11/10	11/10
Total	6.6%	-6.0%	-10.9%	6.4%	11.3%	15.9%
Business	10.5%	-3.6%	-6.2%	-6.1%	3.2%	26.7%
Leisure	5.6%	-6.6%	-12.2%	10.0%	13.3%	11.5%
Day	-17.9%	-10.0%	-27.3%	42.5%	7.6%	20.0%
Night	14.2%	-5.1%	-7.4%	0.4%	12.1%	15.2%
Day Business	-42.9%	12.8%	-36.5%	37.7%	-6.3%	23.8%
Day Leisure	-9.4%	-14.8%	-24.6%	43.3%	10.8%	18.6%
Night Business	32.9%	-6.5%	0.5%	-12.2%	5.3%	27.2%
Night Leisure	9.9%	-4.7%	-9.6%	4.2%	13.8%	10.3%

Chart 6 • % change

New Jersey Travel Segments

MARKET SHARE

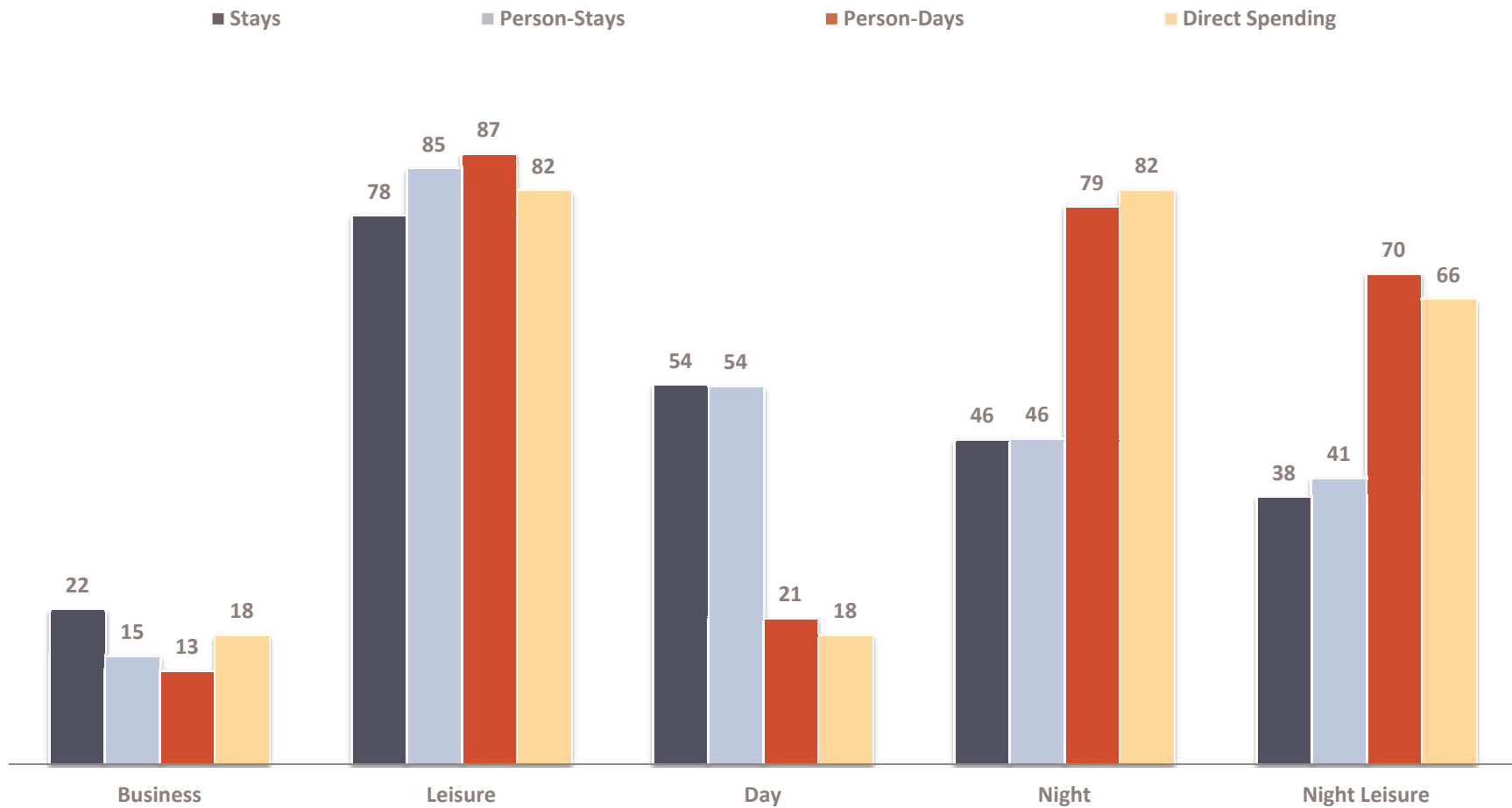


Chart 7 • Segment: 2011 Total Volume (%)

Share of U.S. Travel Segments: New Jersey and Comp Set

MARKET SHARE

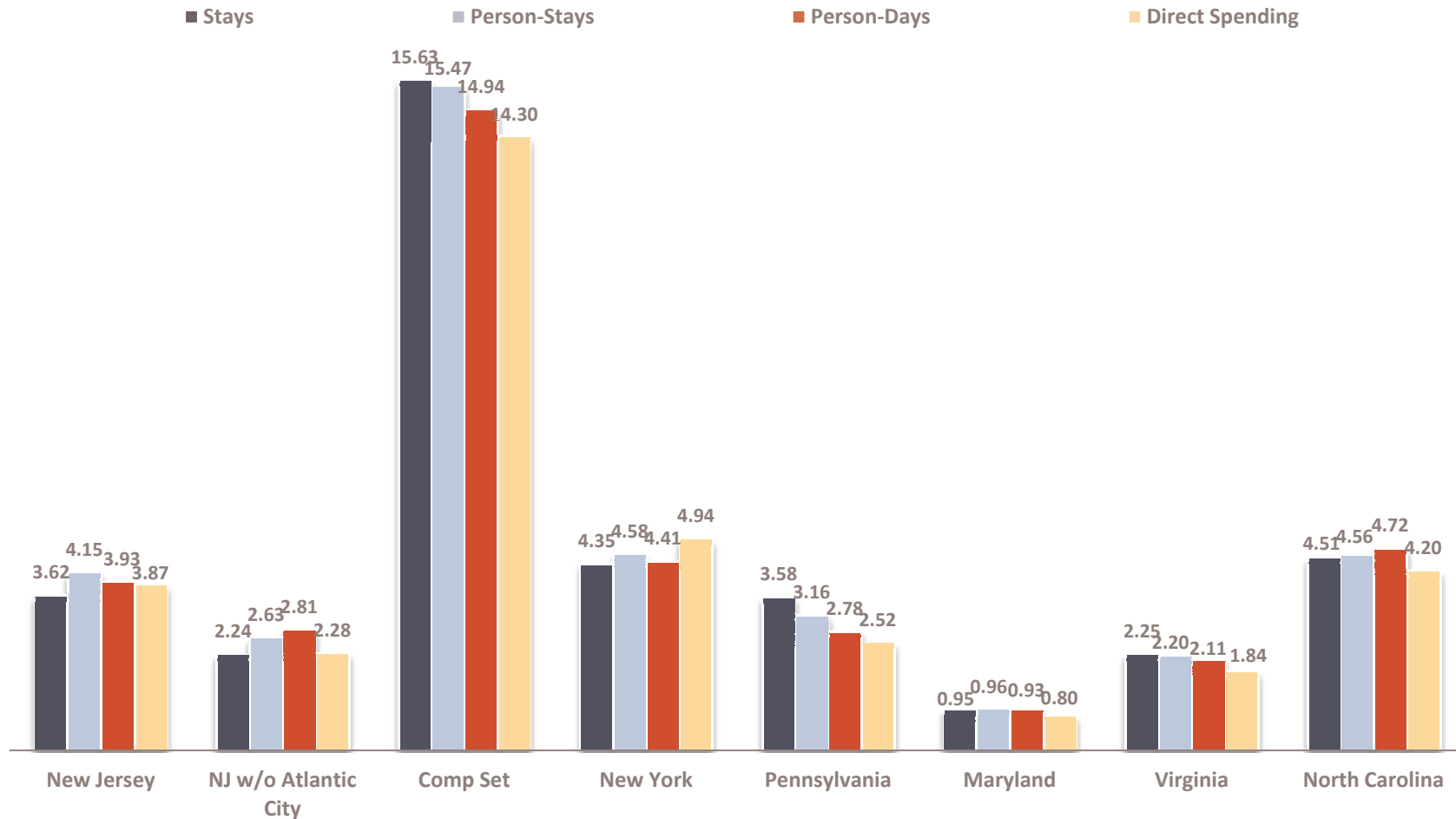


Chart 8 • Segment: 2011 Overnight Leisure (%) • New Jersey N = 1,112 household count

Age Distribution: U.S., New Jersey and Comp Set

DEMOGRAPHICS

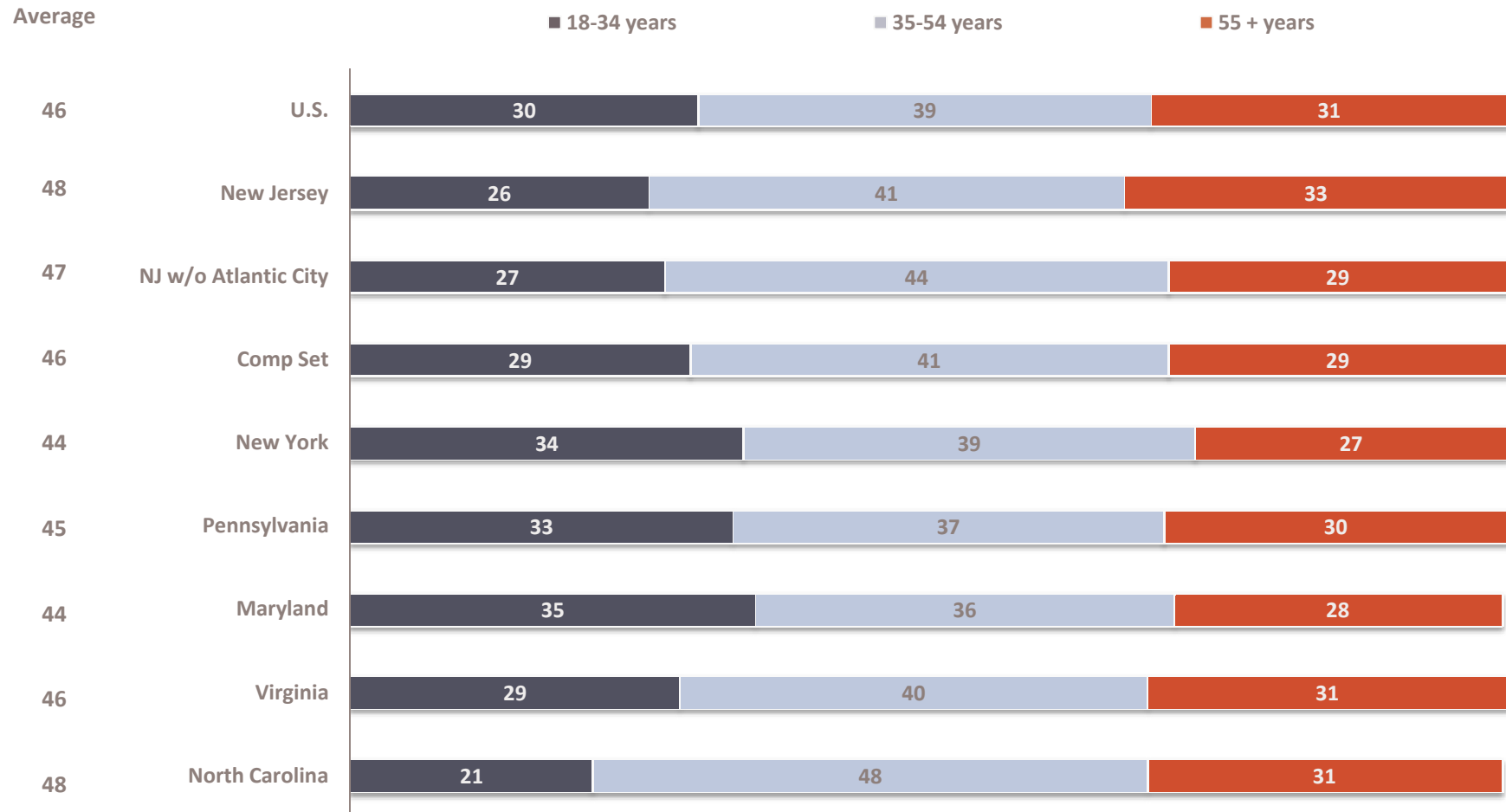


Chart 9 • Segment: 2011 Overnight Leisure Person-Stays (%) • New Jersey N = 1,112 household count

New Jersey Avg. Party per Trip Spending by Age

DEMOGRAPHICS

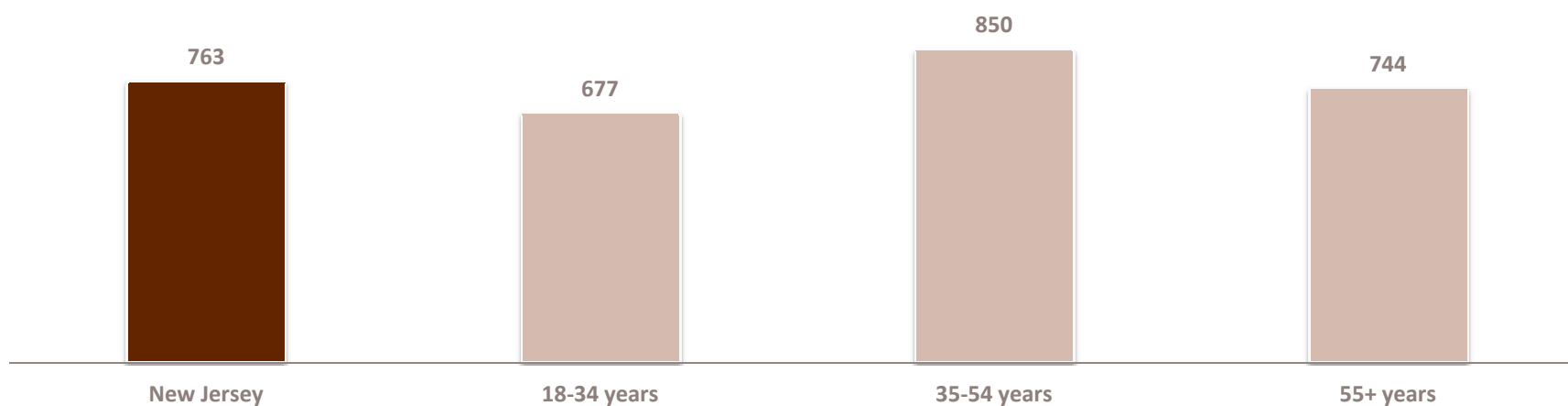


Chart 10 • Segment: 2009-2011 Overnight Leisure Stays (\$) • New Jersey N = 3,116 household count

GLOSSARY

Average Party per Trip Spending

Includes reported expenditures of all travelers (including transportation expenditure) who spend more than \$1 on their trip to or within the destination. Individual averages for subgroups of variables, such as accommodation types or activities might be higher than the total average party per trip spending for a destination because the travelers' spending is included only in those subgroups of variables to which the respondent replied.

New Jersey Age Comparison

DEMOGRAPHICS

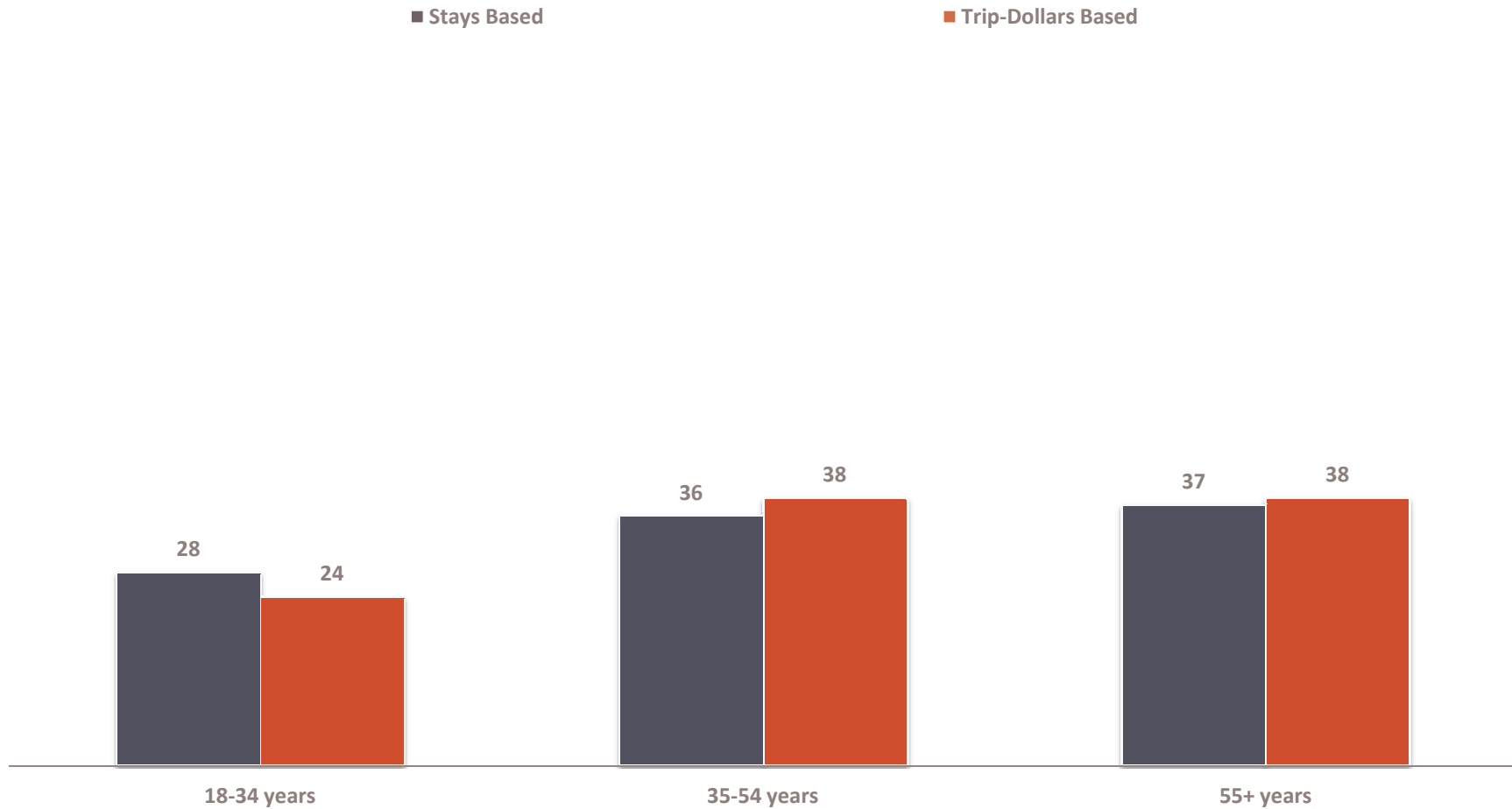


Chart 11 • Segment: 2009-2011 Overnight Leisure (%) • New Jersey N = 4,152 household count

Distribution of Children in Household: U.S., New Jersey and Comp Set

DEMOGRAPHICS

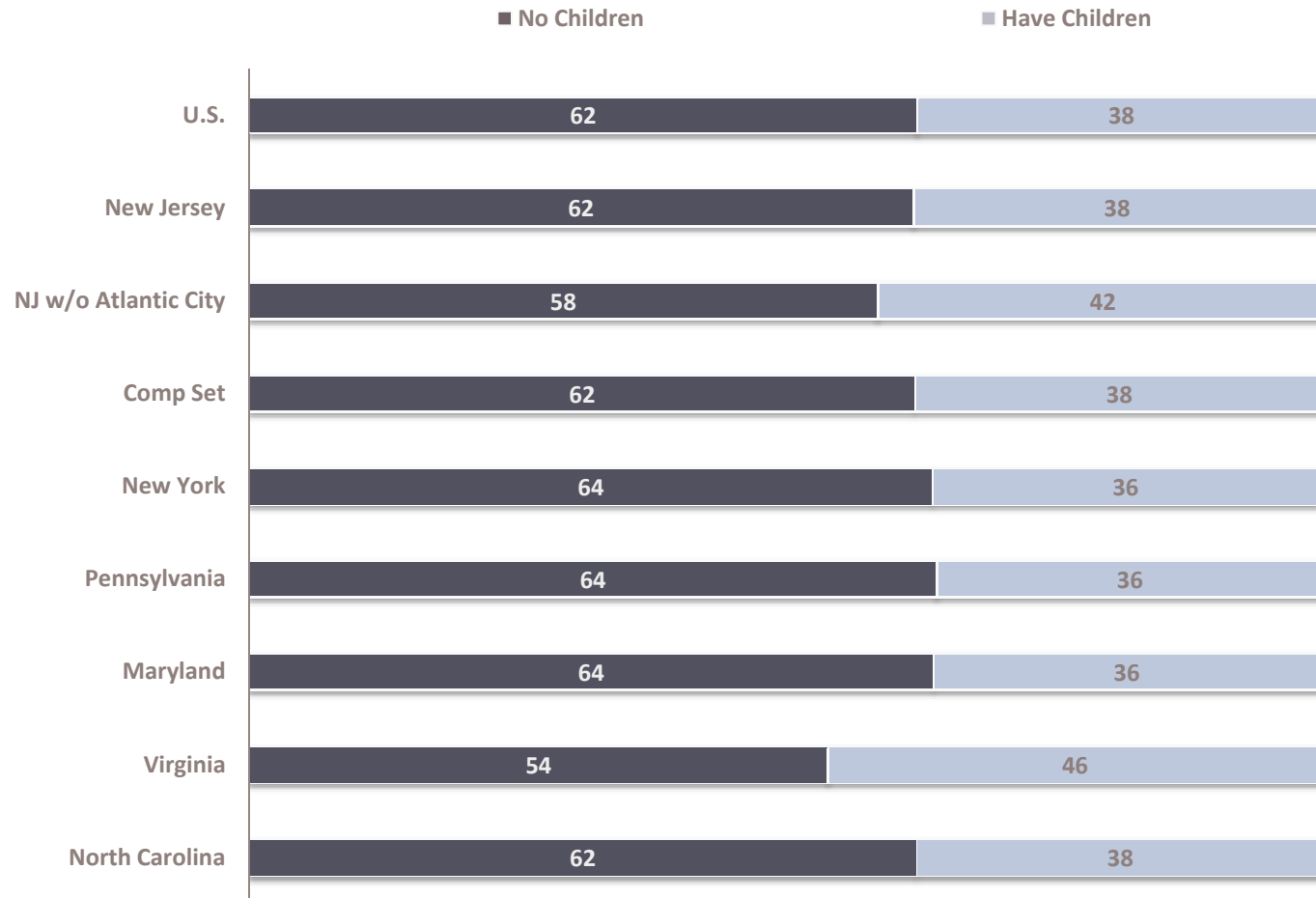


Chart 12 • Segment: 2011 Overnight Leisure Person-Stays (%) • New Jersey N = 1,112 household count

GLOSSARY

Household Income Distribution: U.S., New Jersey and Comp Set

DEMOGRAPHICS

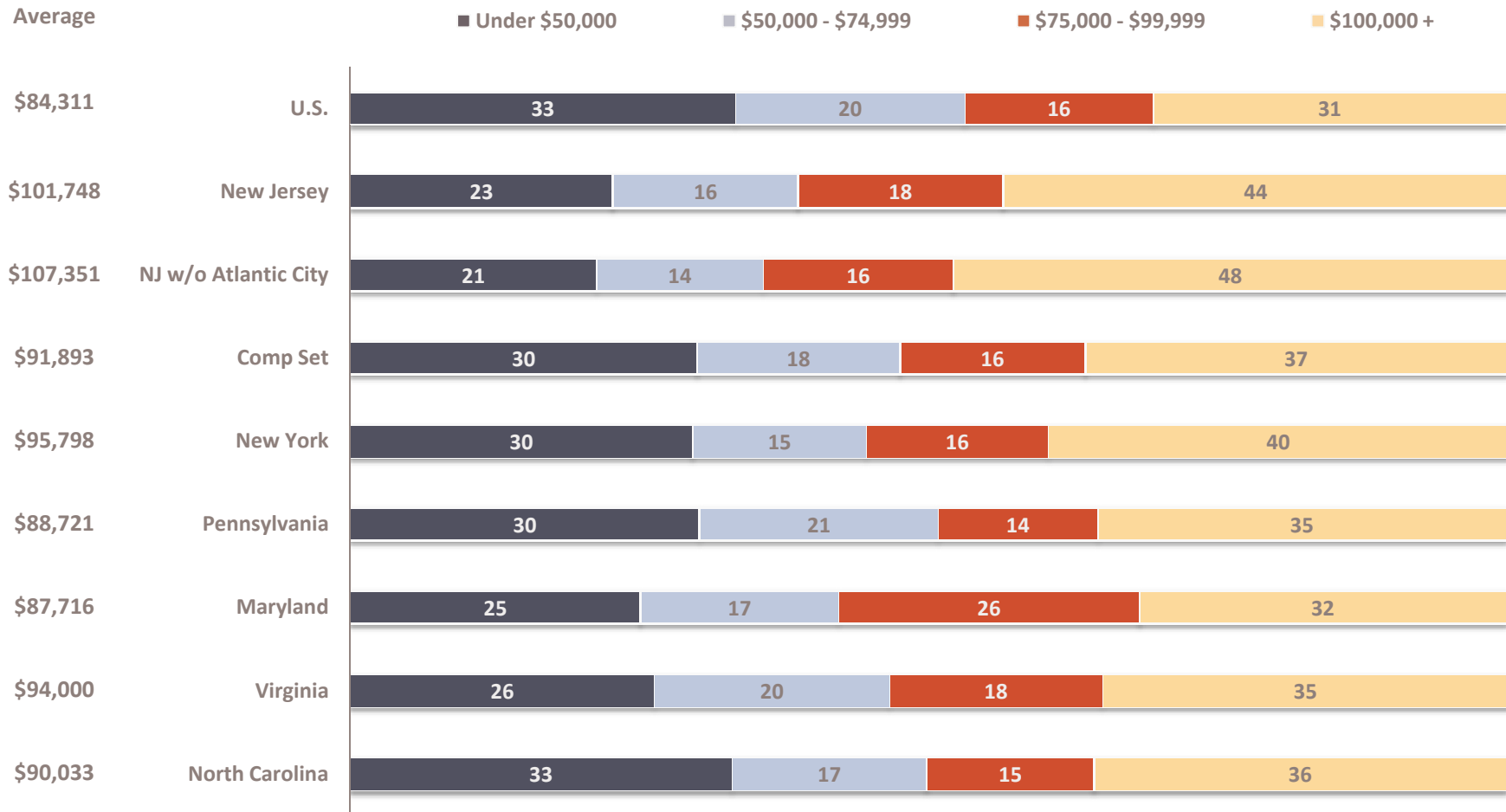


Chart 13 • Segment: 2011 Overnight Leisure Person-Stays (%) • New Jersey N = 1,112 household count

Lifestage Distribution: U.S., New Jersey and Comp Set

DEMOGRAPHICS

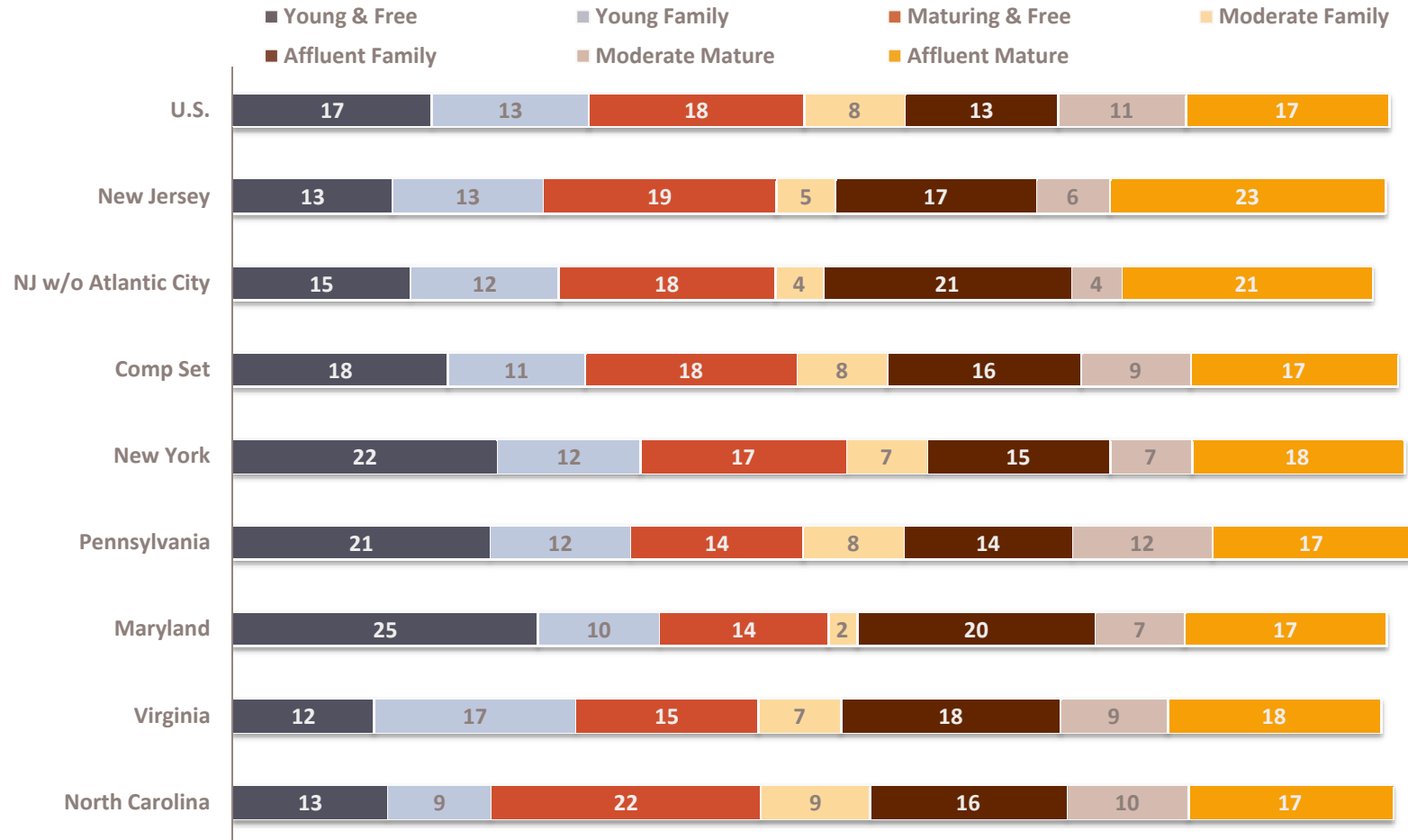


Chart 14 • Segment: 2011 Overnight Leisure Person-Stays (%) • New Jersey N = 1,112 household count

New Jersey Avg. Party per Trip Spending by Lifestage

DEMOGRAPHICS

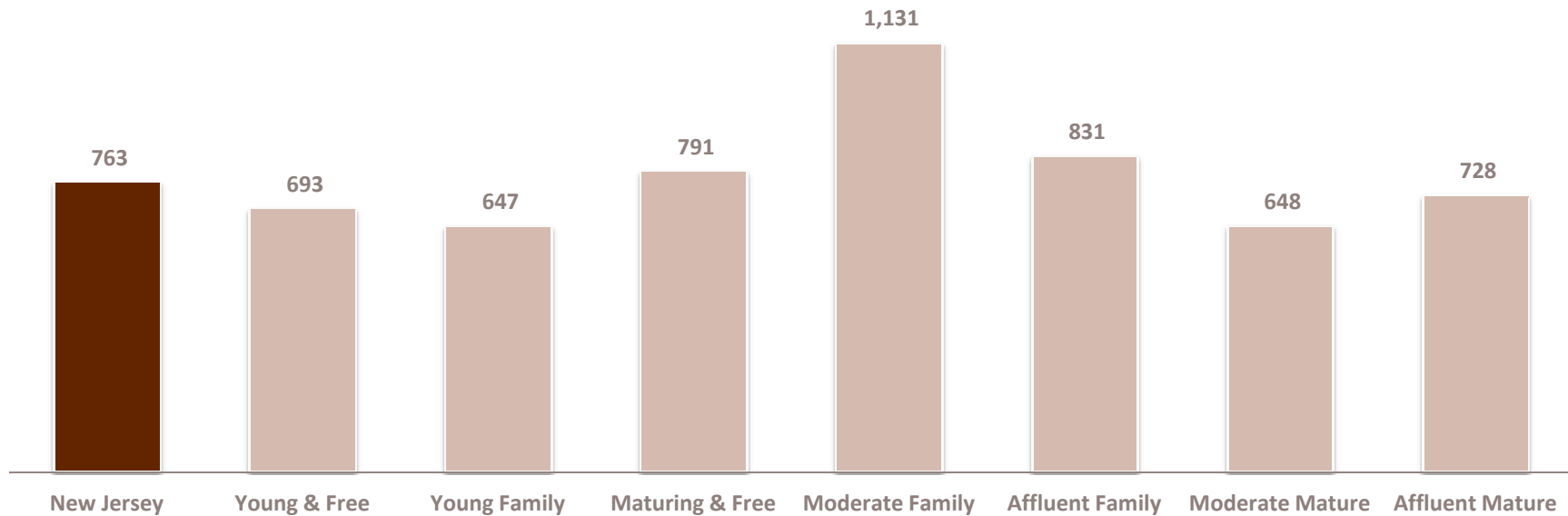


Chart 15 • Segment: 2009-2011 Overnight Leisure Stays (\$) • New Jersey N = 3,117 household count

New Jersey Lifestage Comparison

DEMOGRAPHICS

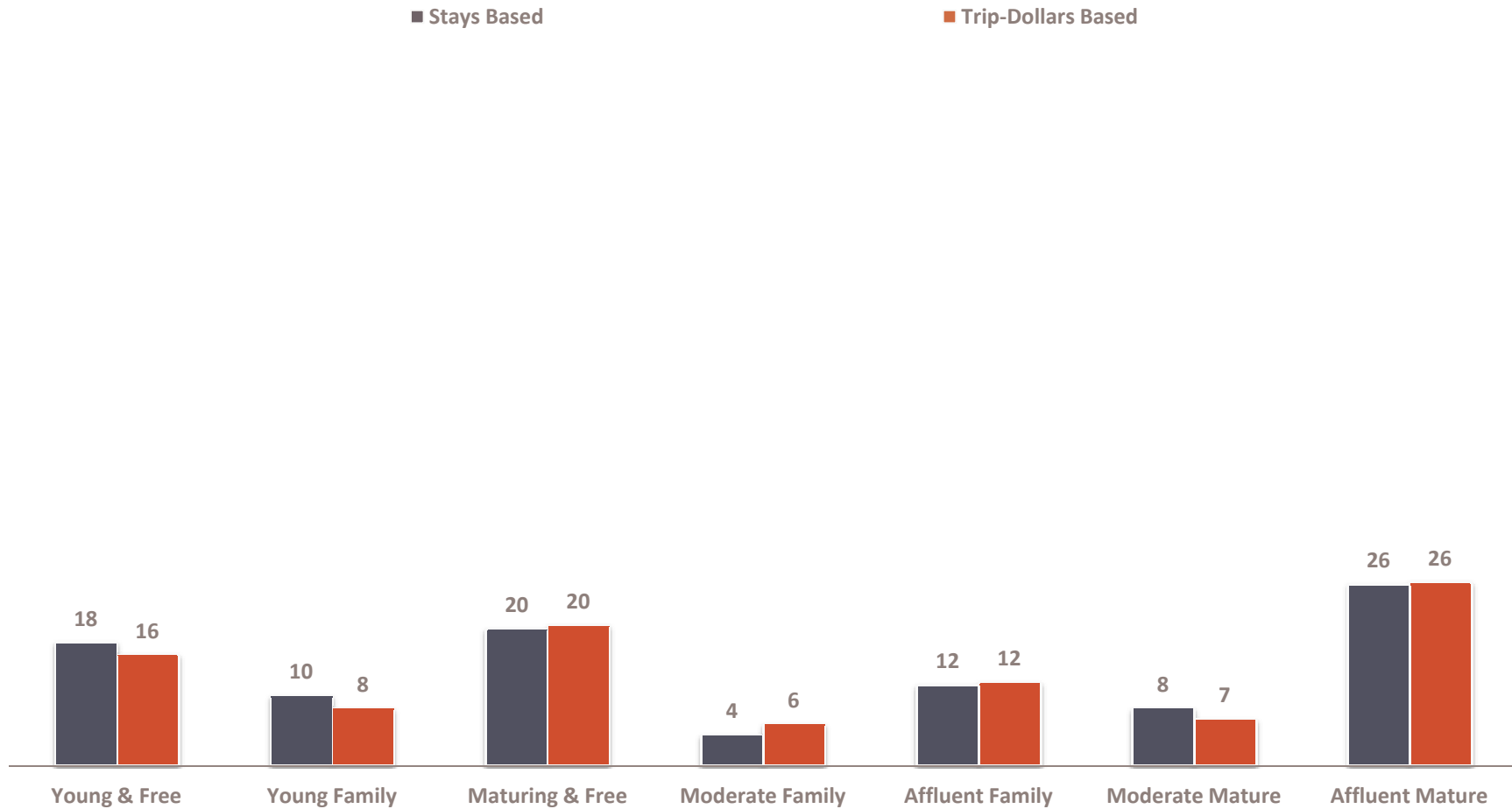


Chart 16 • Segment: 2009-2011 Overnight Leisure (%) • New Jersey N = 4,153 household count

Traveler Generation Distribution: U.S., New Jersey and Comp Set

DEMOGRAPHICS

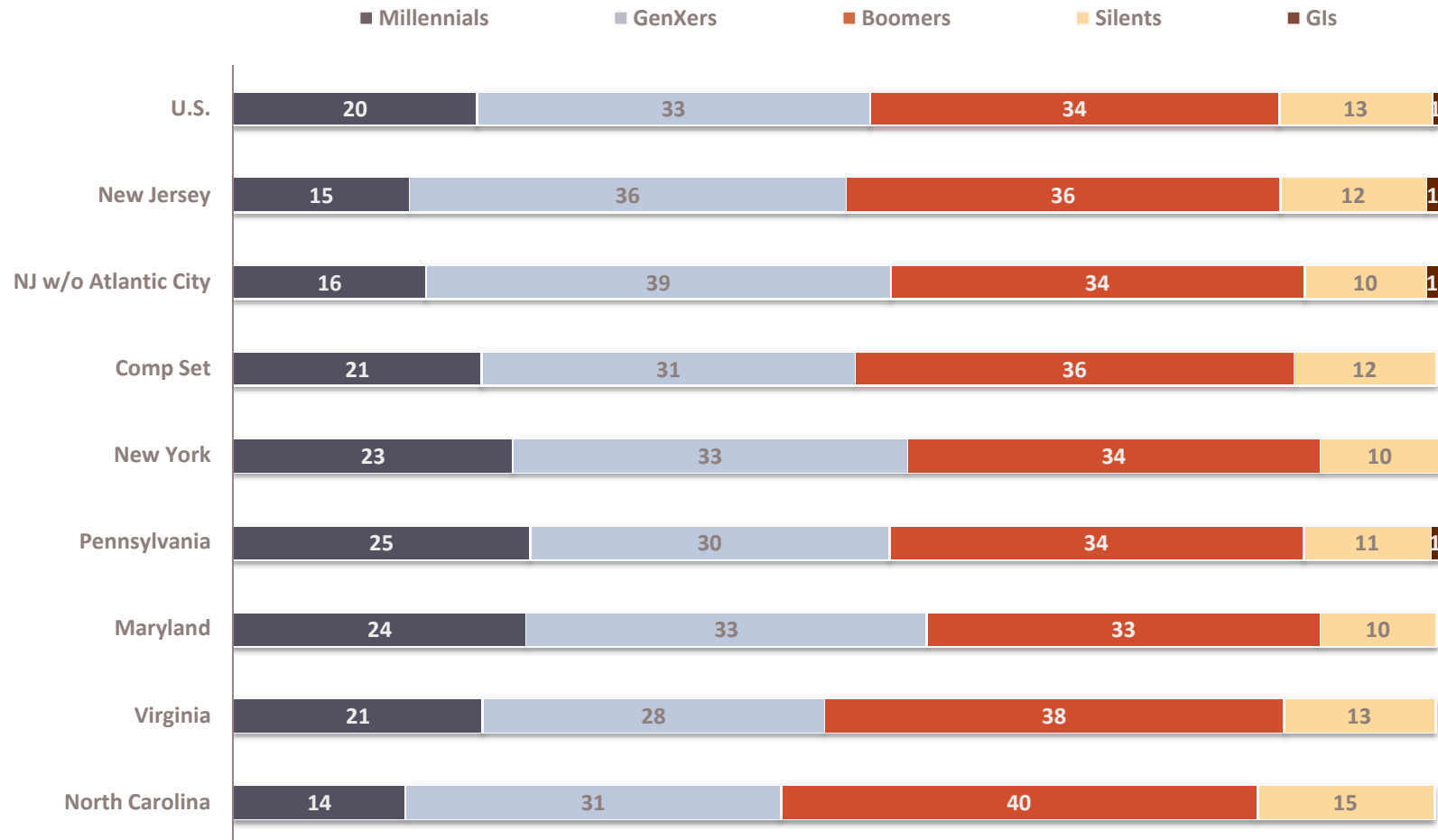


Chart 17 • Segment: 2011 Overnight Leisure Person-Stays (%) • New Jersey N = 1,112 household count

New Jersey Avg. Party per Trip Spending by Generation

DEMOGRAPHICS

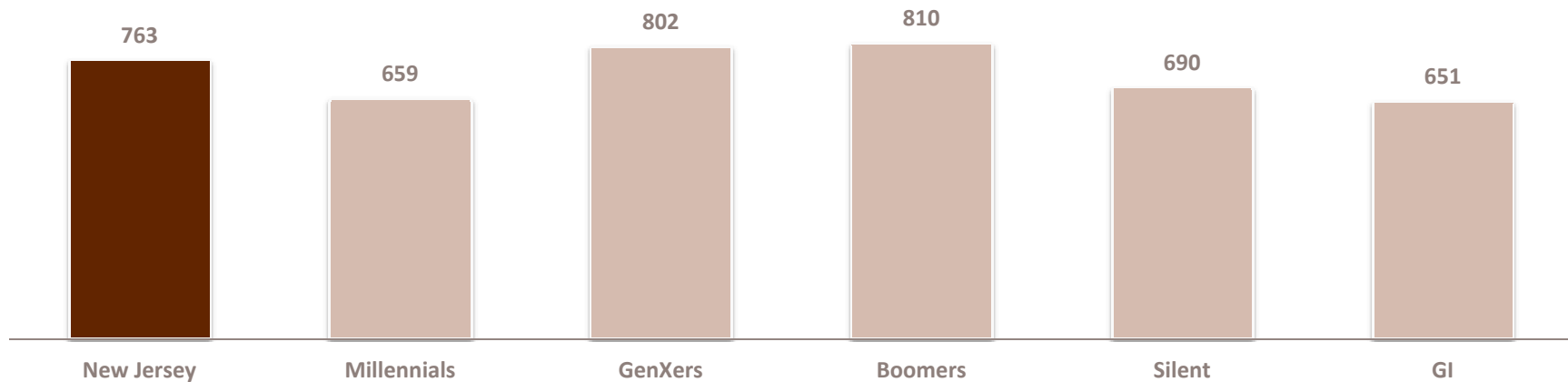


Chart 18 • Segment: 2009-2011 Overnight Leisure Stays (\$) • New Jersey N = 3,116 household count

New Jersey Traveler Generation Comparison

DEMOGRAPHICS

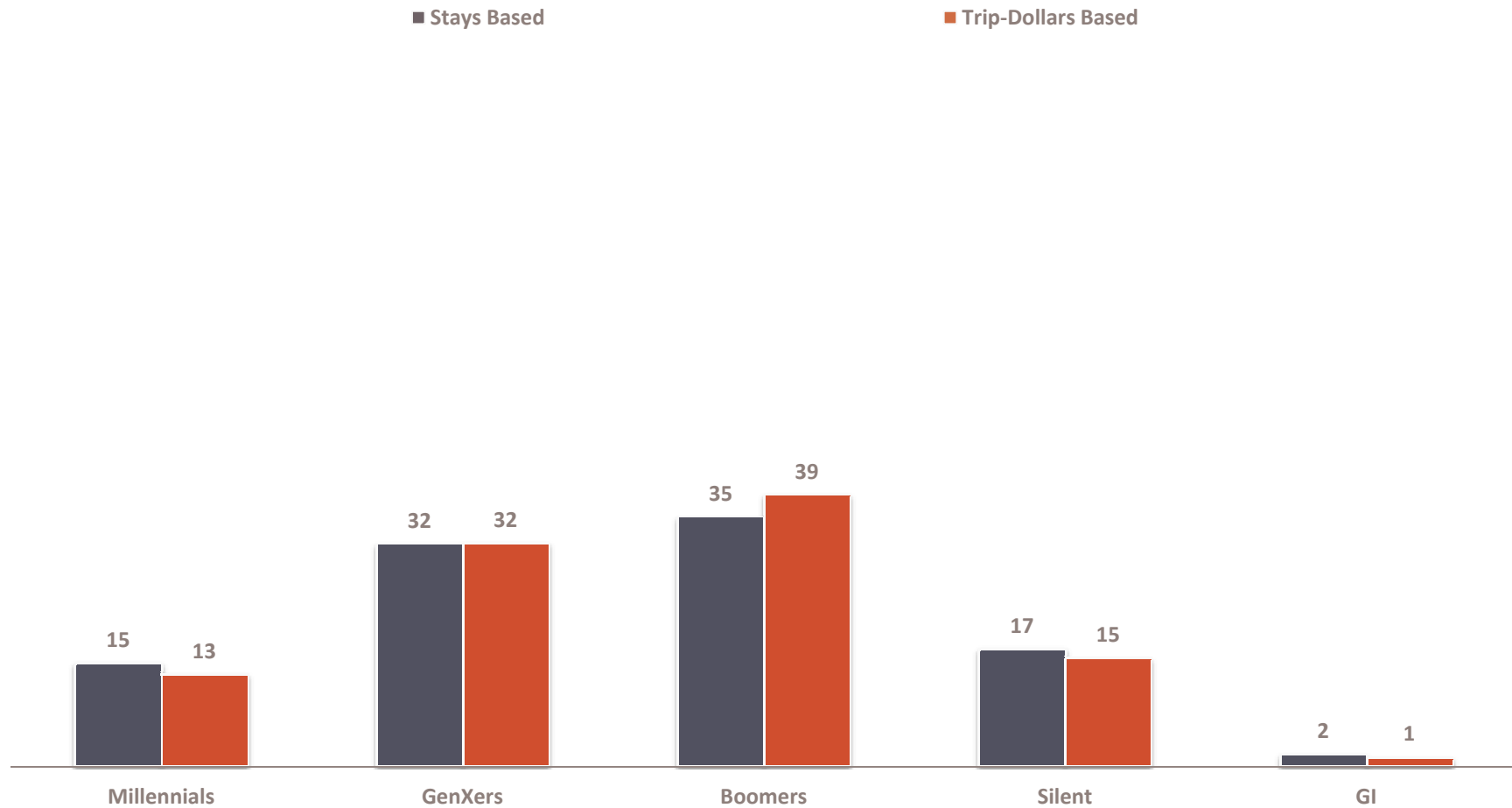


Chart 19 • Segment: 2009-2011 Overnight Leisure (%) • New Jersey N = 4,152 household count

Origin Divisions for Travel to New Jersey

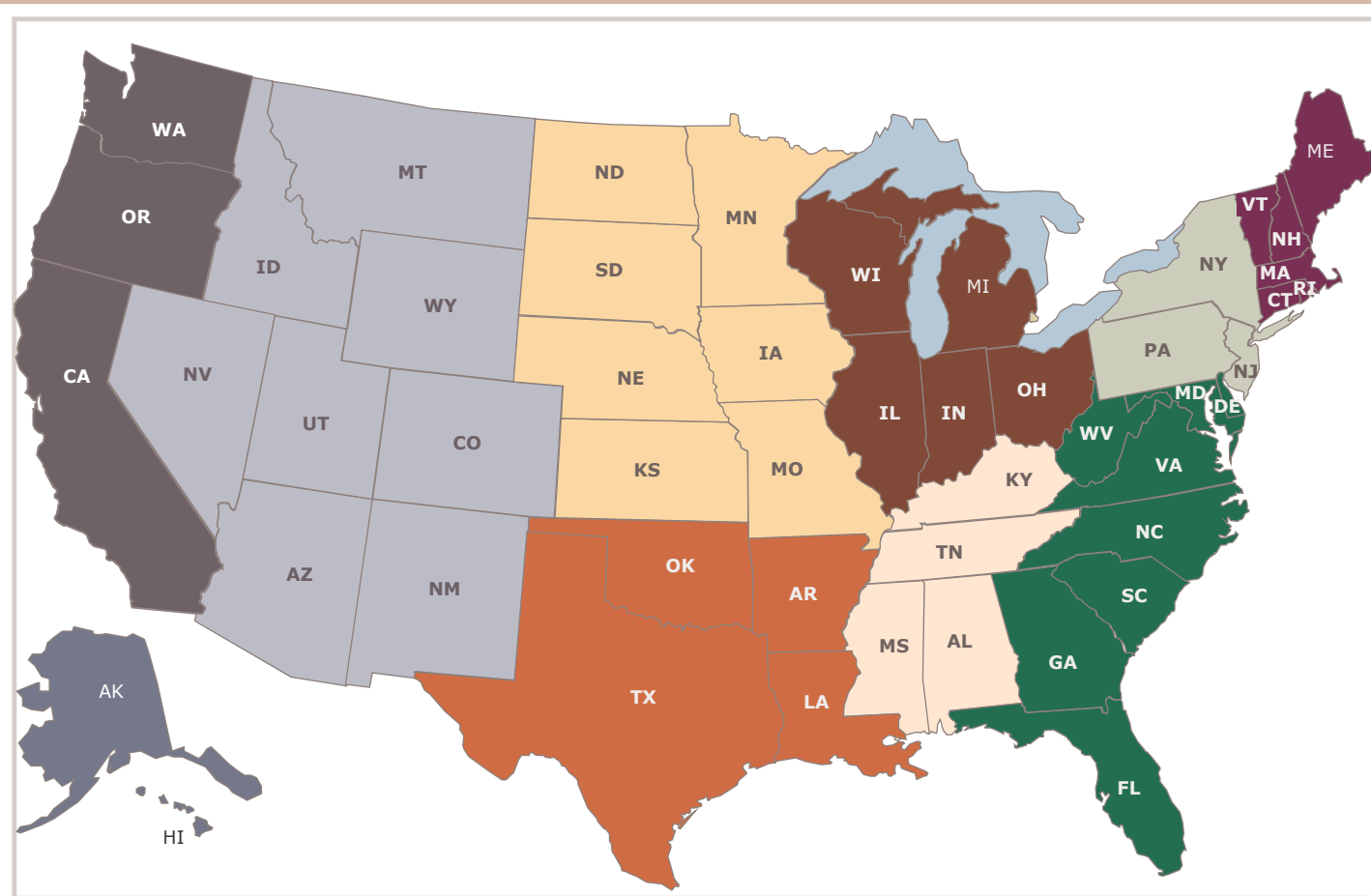


Chart 20 • Segment: 2011 Overnight Leisure Person-Stays (%) • New Jersey N = 1,110 household count

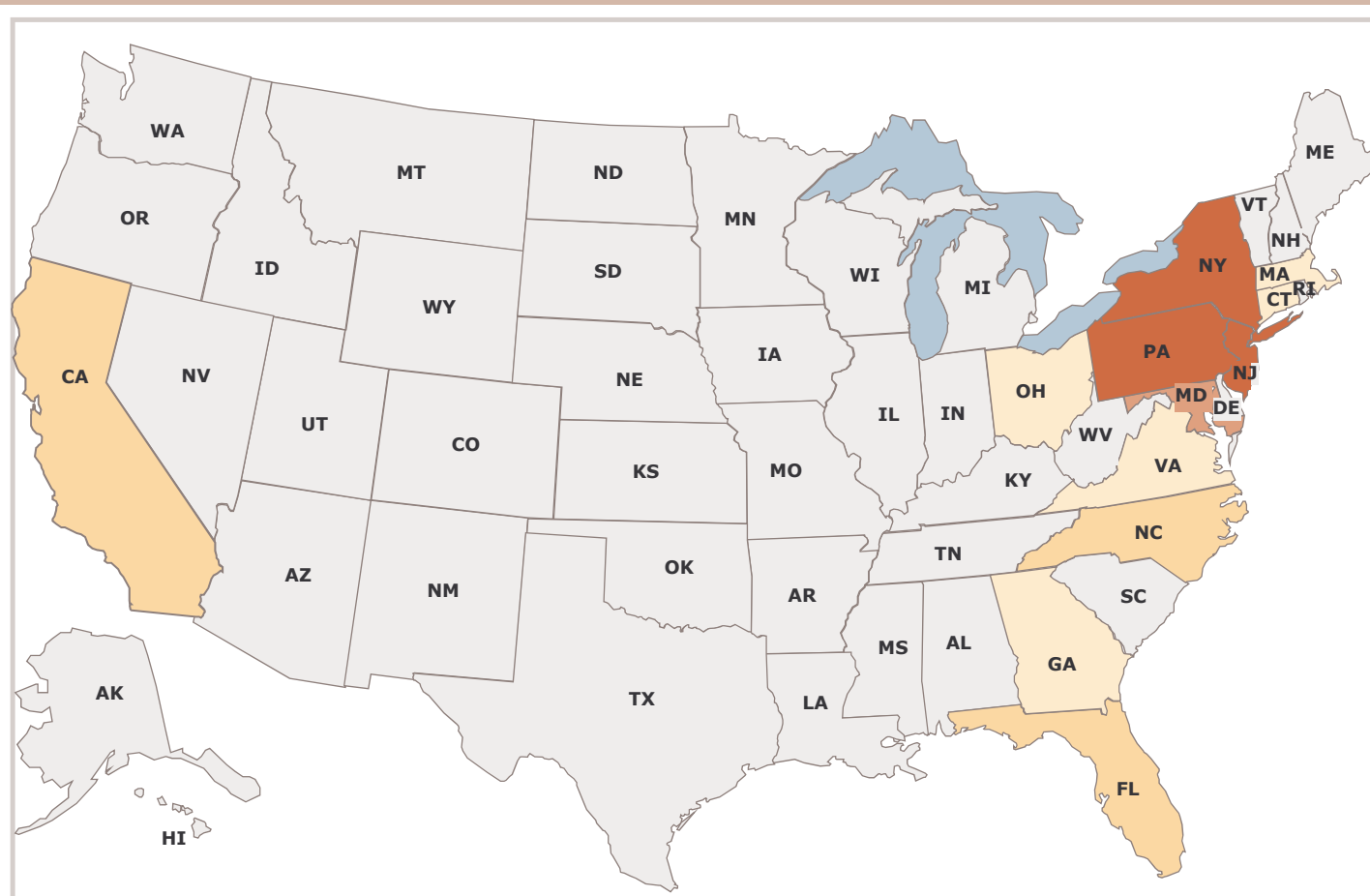
TRIP ORIGIN

LEGEND

Pacific	3.7%
Rocky Mountain	3.0%
West North Central	0.6%
West South Central	1.4%
East North Central	4.2%
East South Central	0.9%
New England	6.0%
Middle Atlantic	61.5%
South Atlantic	18.8%

Top Origin States to New Jersey

TRIP ORIGIN



LEGEND

	25.5% New York
	20.9% New Jersey
	15.1% Pennsylvania
	5.3% Maryland
	4.6% North Carolina
	3.1% California
	3.0% Florida
	2.7% Virginia
	2.4% Massachusetts
	2.2% Ohio
	2.1% Georgia
	2.0% Connecticut

Chart 21 • Segment: 2011 Overnight Leisure Person-Stays (%) • New Jersey N = 1,110 household count

Top Origin DMAs to New Jersey

TRIP ORIGIN

	U.S.	New Jersey	NJ w/o Atlantic City	Comp Set	New York	Pennsylvania	Maryland	Virginia	North Carolina
New York, NY	6.1%	37.7%	33.4%	12.4%	16.2%	17.2%	12.7%	10.5%	5.9%
Philadelphia, PA	2.6%	15.8%	14.5%	6.1%	3.0%	14.2%	10.7%	4.1%	3.7%
Washington, DC (Hagerstown, MD)	2.5%	5.1%	5.2%	7.8%	4.2%	8.0%	18.2%	16.0%	5.0%
Raleigh-Durham, NC	1.2%	3.5%	4.3%	4.0%	0.7%	0.6%	3.0%	3.9%	9.8%
Baltimore, MD	1.0%	2.1%	1.0%	3.0%	1.8%	3.8%	7.5%	6.5%	1.1%
Wilkes Barre- Scranton, PA	0.6%	2.1%	2.6%	1.5%	2.1%	3.3%	1.2%	0.4%	0.3%
Boston, MA (Manchester, NH)	1.9%	1.9%	2.8%	2.9%	6.3%	1.9%	2.4%	1.8%	0.6%
Harrisburg-Lancaster- Lebanon-York, PA	0.6%	1.9%	2.4%	1.6%	0.1%	5.6%	2.8%	1.2%	0.2%
Atlanta, GA	2.3%	1.7%	2.3%	2.8%	2.1%	1.1%	1.5%	2.5%	4.9%
Los Angeles, CA	5.2%	1.7%	2.5%	1.0%	2.6%	0.3%	0.9%	0.3%	0.3%
Top 10 Sum	24.0%	73.5%	71.0%	43.1%	39.1%	56.0%	60.9%	47.2%	31.8%

Chart 22 • Segment: 2011 Overnight Leisure Person-Stays (%) • New Jersey N = 1,108 household count

New Jersey Avg. Party per Trip Spending by Origin DMA

TRIP ORIGIN

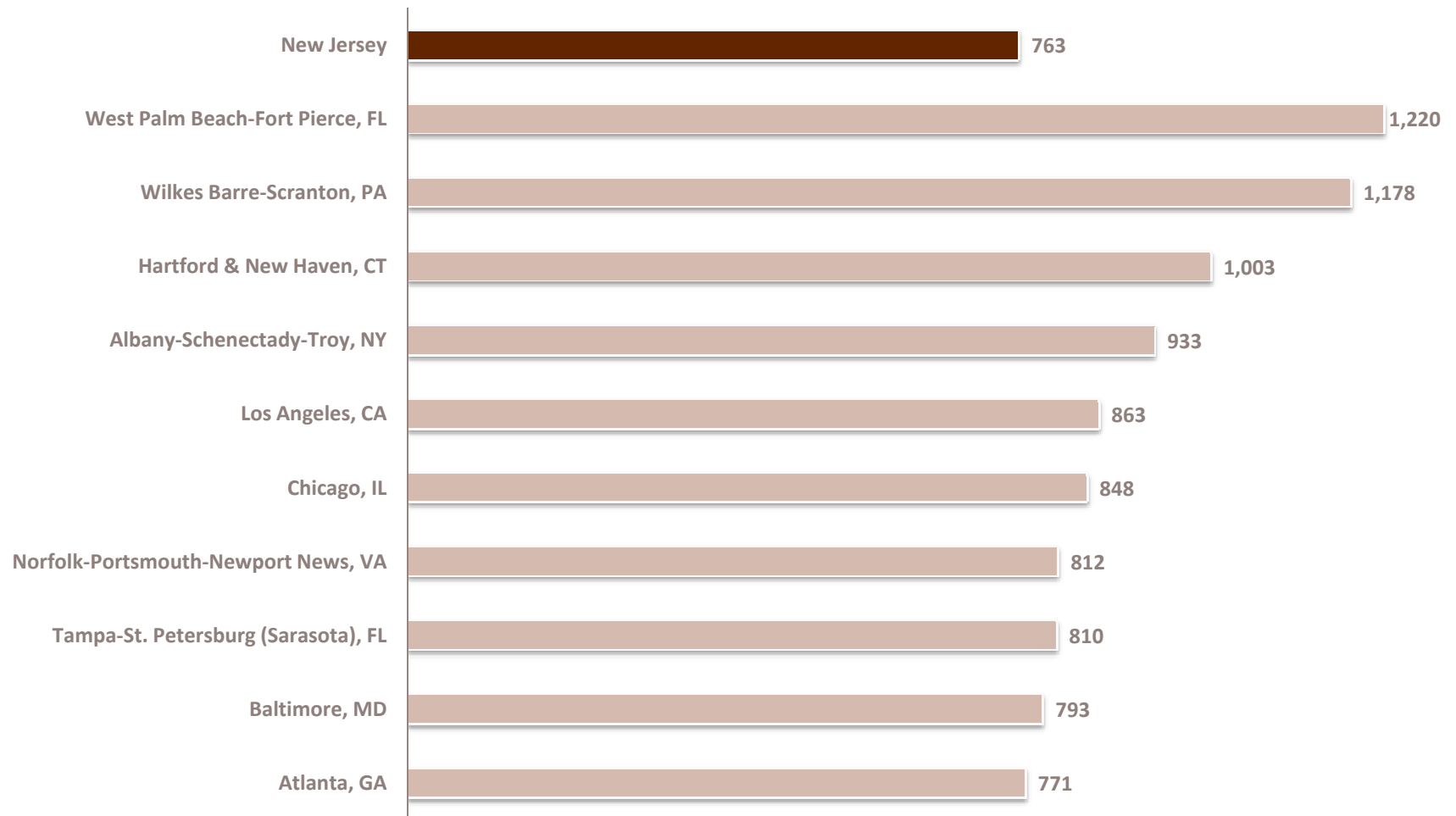


Chart 23 • Segment: 2009-2011 Overnight Leisure Stays (\$) • New Jersey N = 3,100 household count

New Jersey Avg. Party per Trip Spending by Origin DMA (cont.)

TRIP ORIGIN

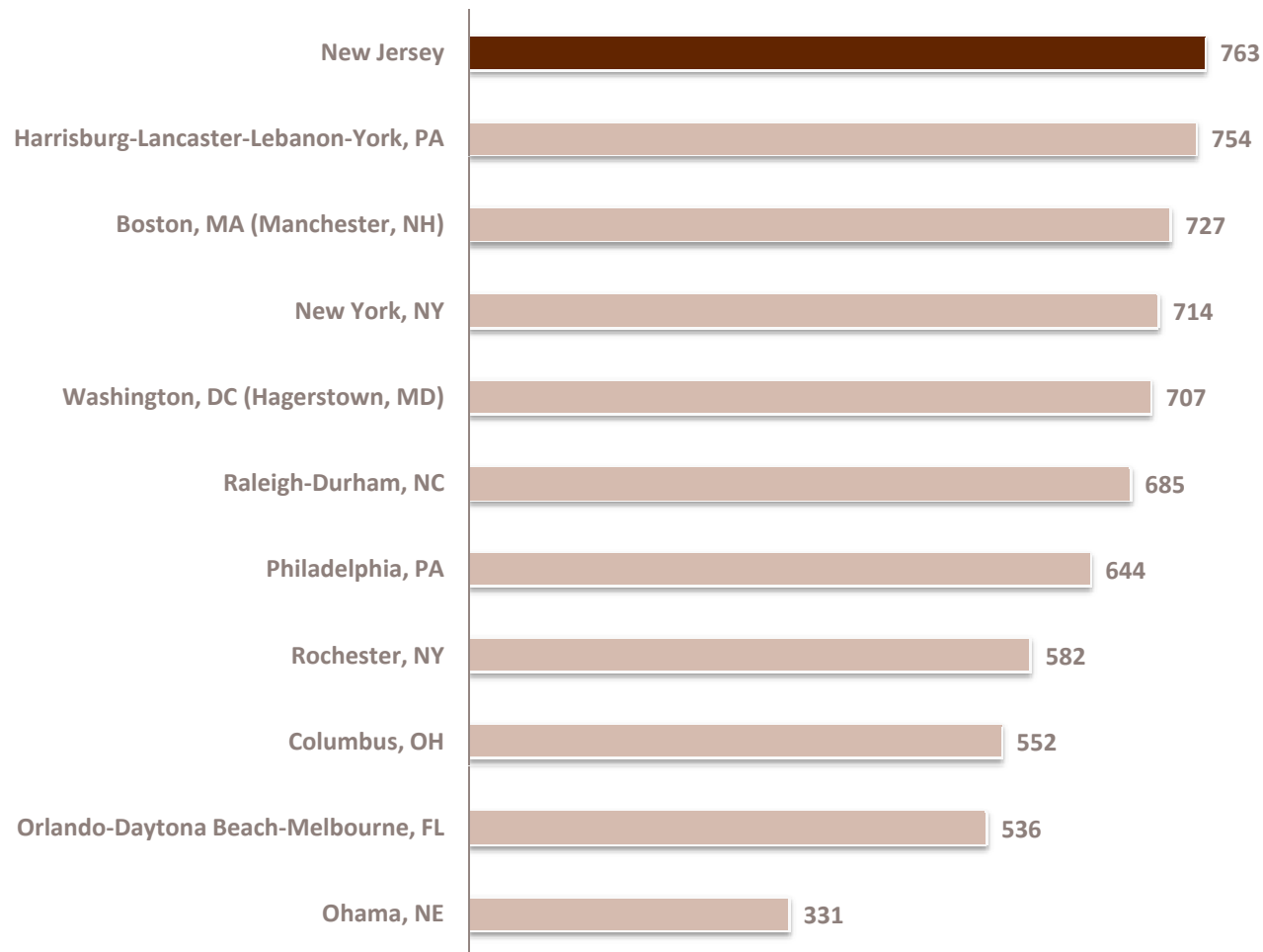


Chart 24 • Segment: 2009-2011 Overnight Leisure Stays (\$) • New Jersey N = 3,100 household count

New Jersey Origin DMA Comparison

TRIP ORIGIN

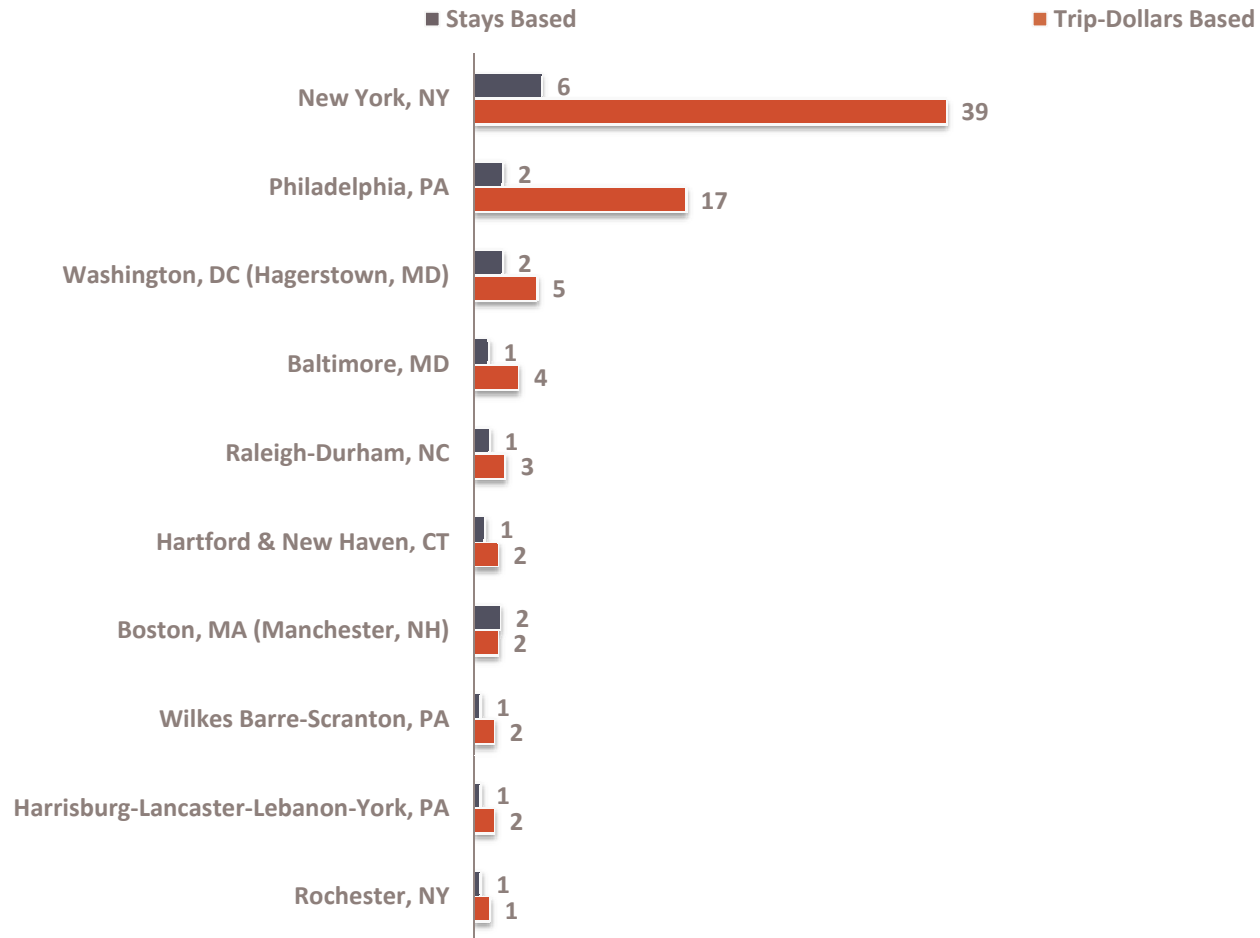


Chart 25 • Segment: 2009-2011 Overnight Leisure (%) • New Jersey N = 4,117 household count

Main Mode of Transportation: U.S., New Jersey and Comp Set

TRANSPORTATION

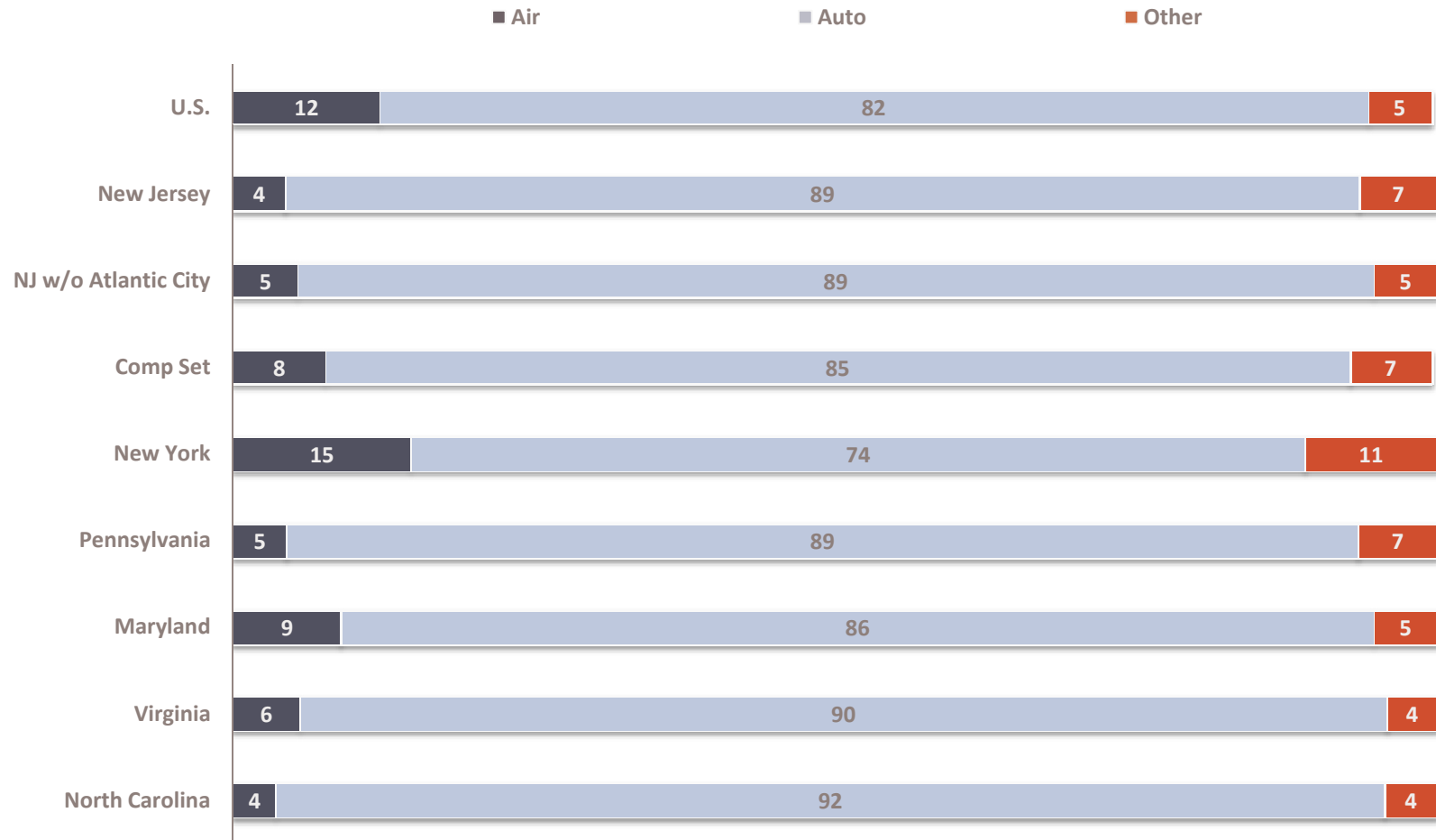


Chart 26 • Segment: 2011 Overnight Leisure Person-Stays (%) • New Jersey N = 1,107 household count

Travel Distance by Auto: U.S., New Jersey and Comp Set

TRANSPORTATION

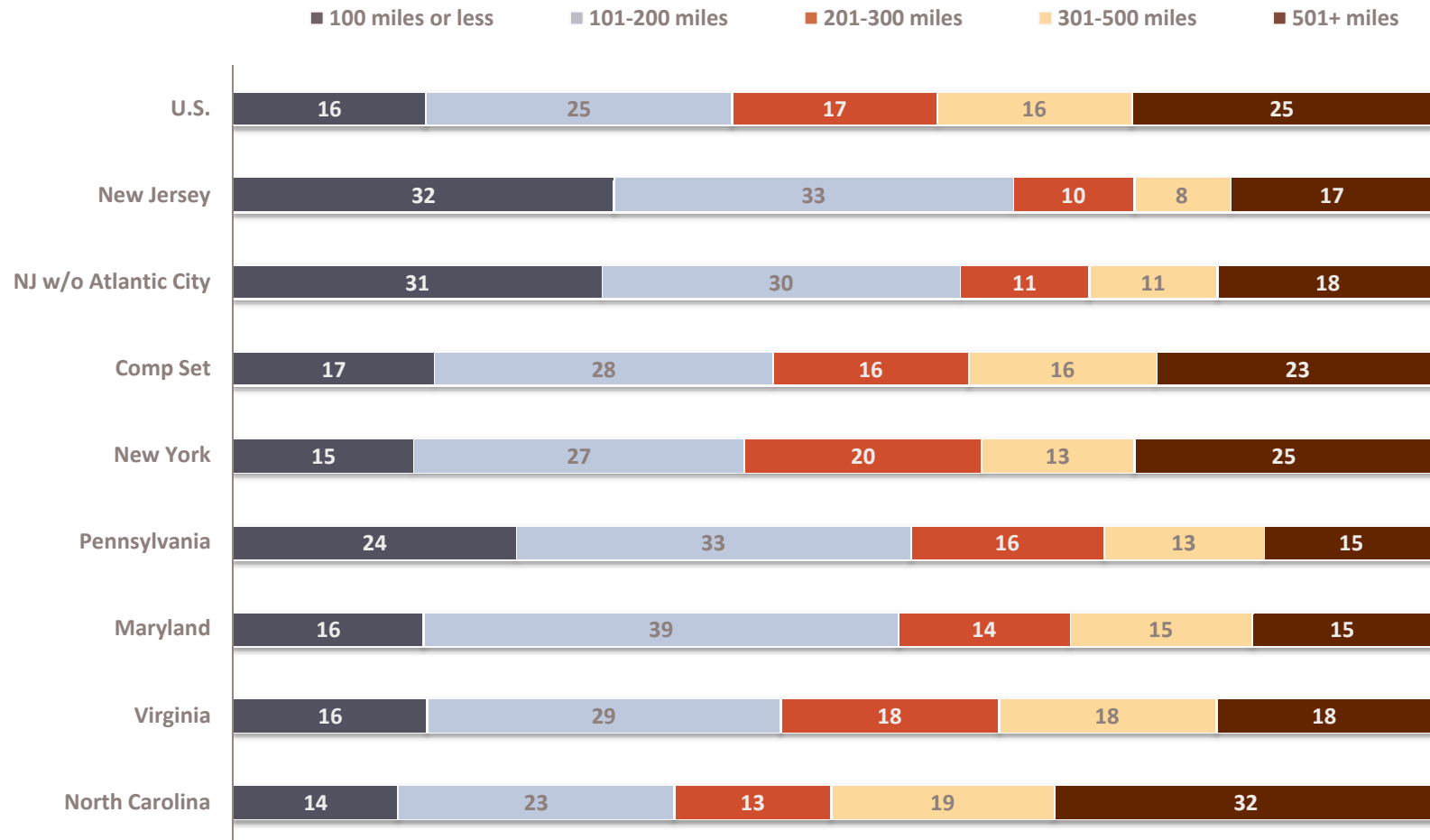


Chart 27 • Segment: 2011 Overnight Leisure Person-Stays (%) • New Jersey N = 893 household count

Travel Distance by Air: U.S., New Jersey and Comp Set

TRANSPORTATION

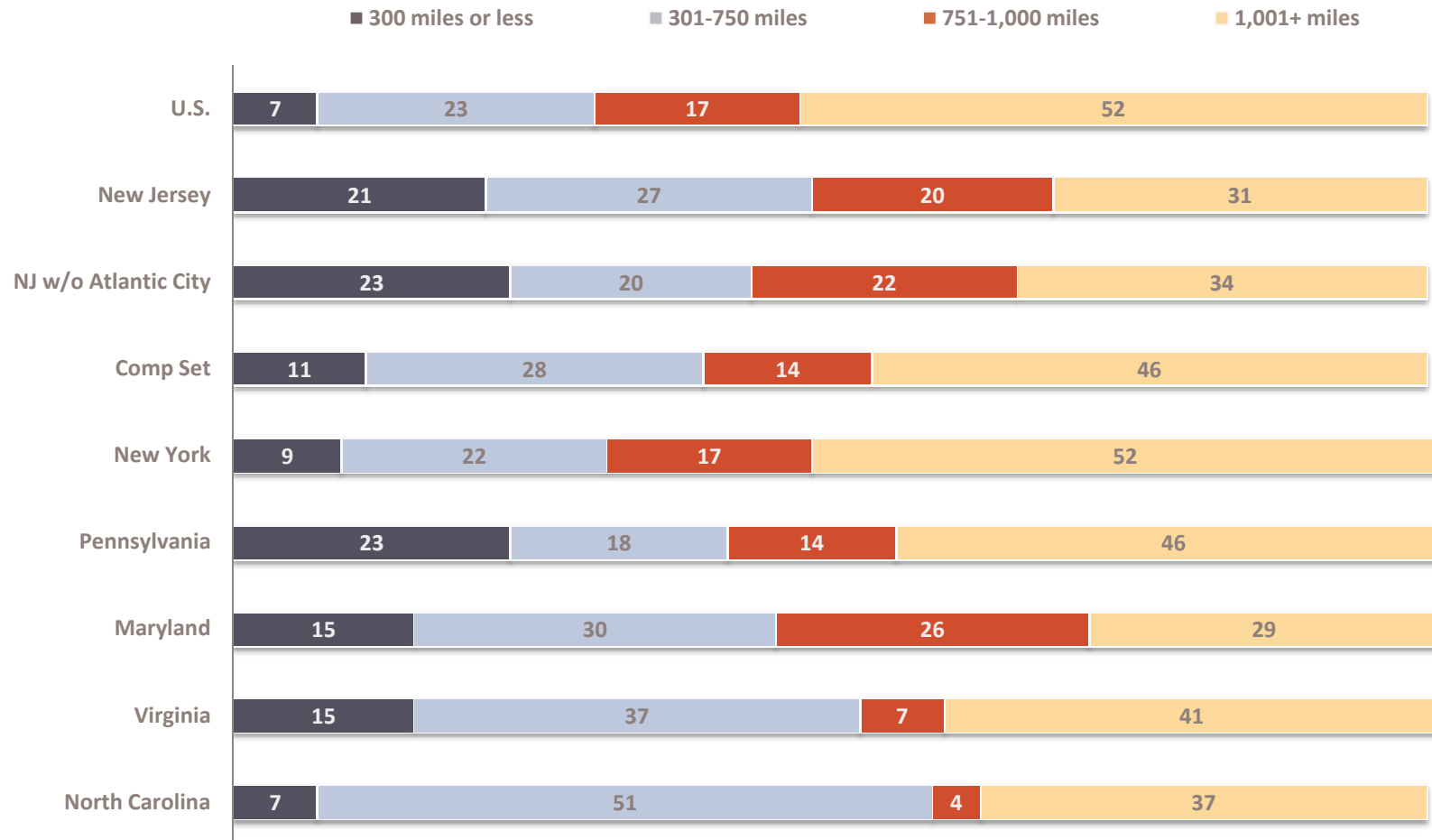


Chart 28 • Segment: 2011 Overnight Leisure Person-Stays (%) • New Jersey N = 141 household count

New Jersey Month Trip Started

TRIP TIMING

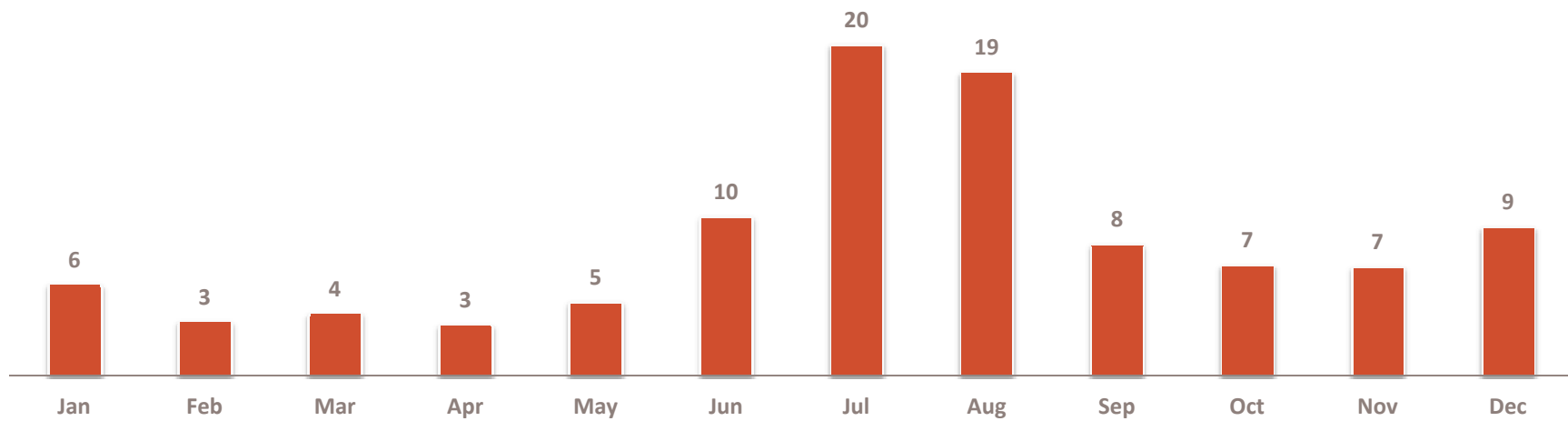


Chart 29 • Segment: 2011 Overnight Leisure Person-Stays (%) • New Jersey N = 1,112 household count

Trip Timing by Quarter: U.S., New Jersey and Comp Set

TRIP TIMING

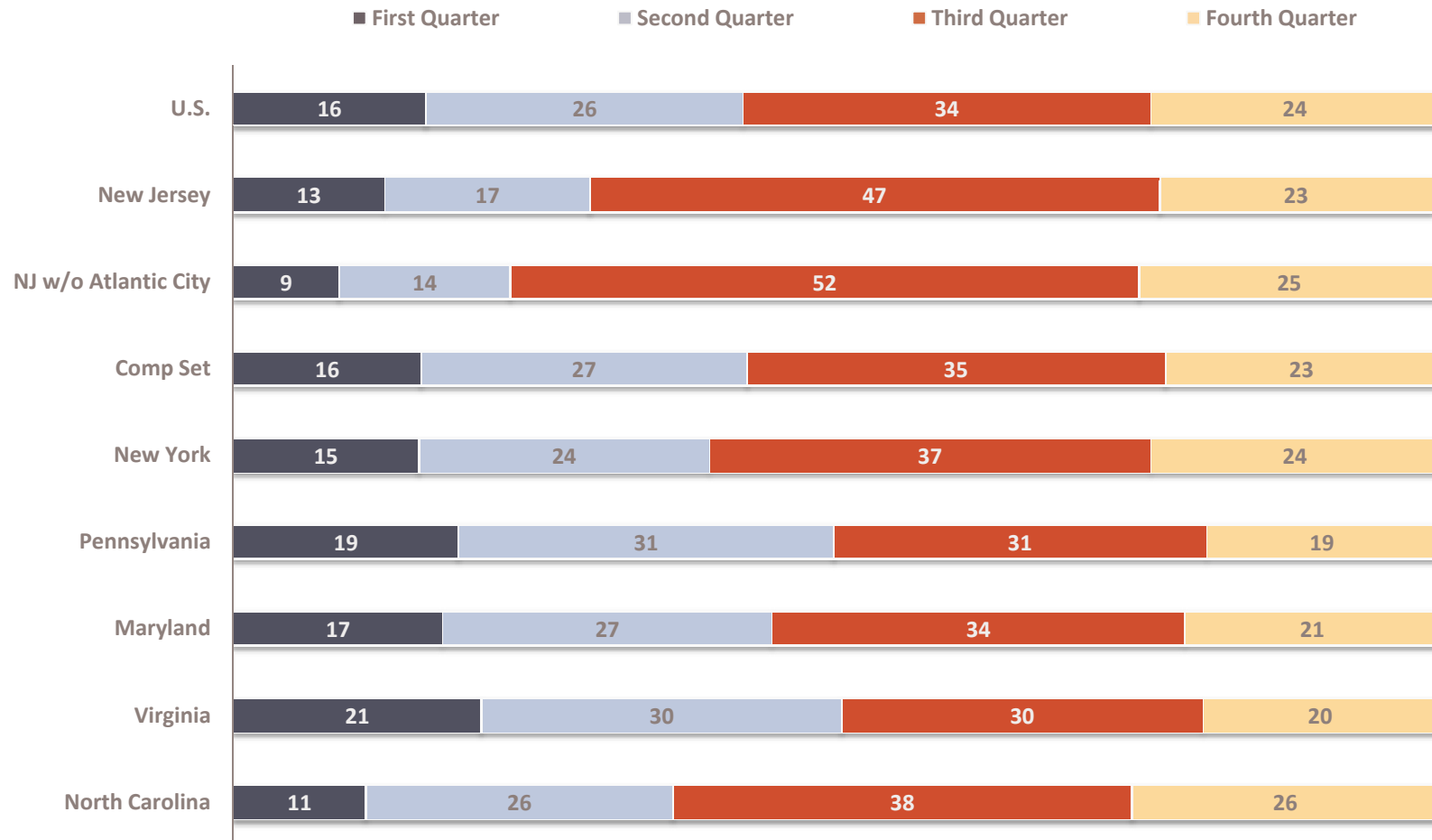


Chart 30 • Segment: 2011 Overnight Leisure Person-Stays (%) • New Jersey N = 1,112 household count

New Jersey Avg. Party per Trip Spending by Quarter

TRIP TIMING

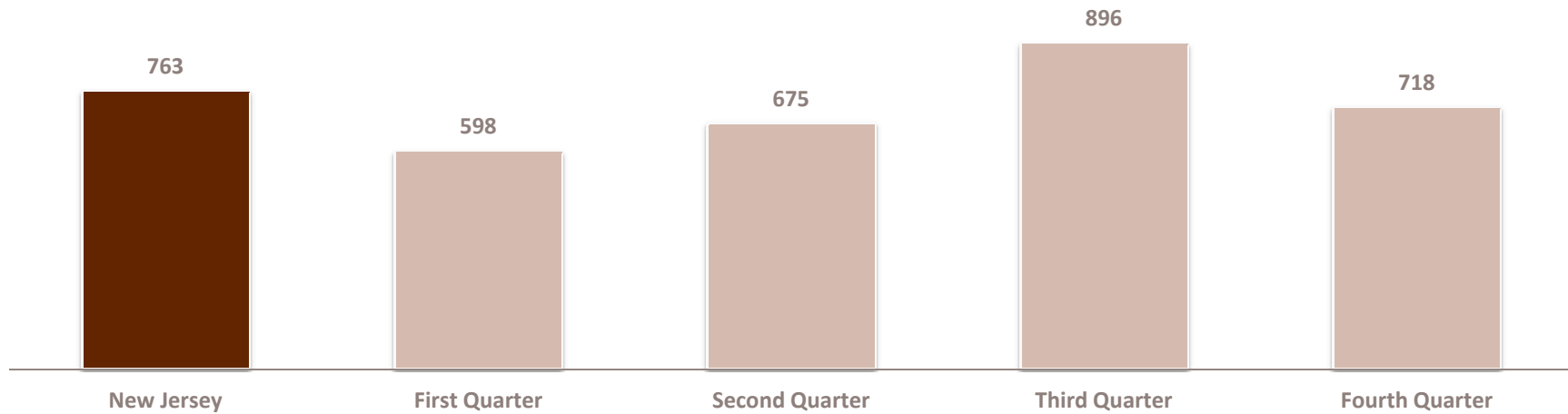


Chart 31 • Segment: 2009-2011 Overnight Leisure Stays (\$) • New Jersey N = 3,117 household count

New Jersey Trip Timing Comparison by Quarter

TRIP TIMING

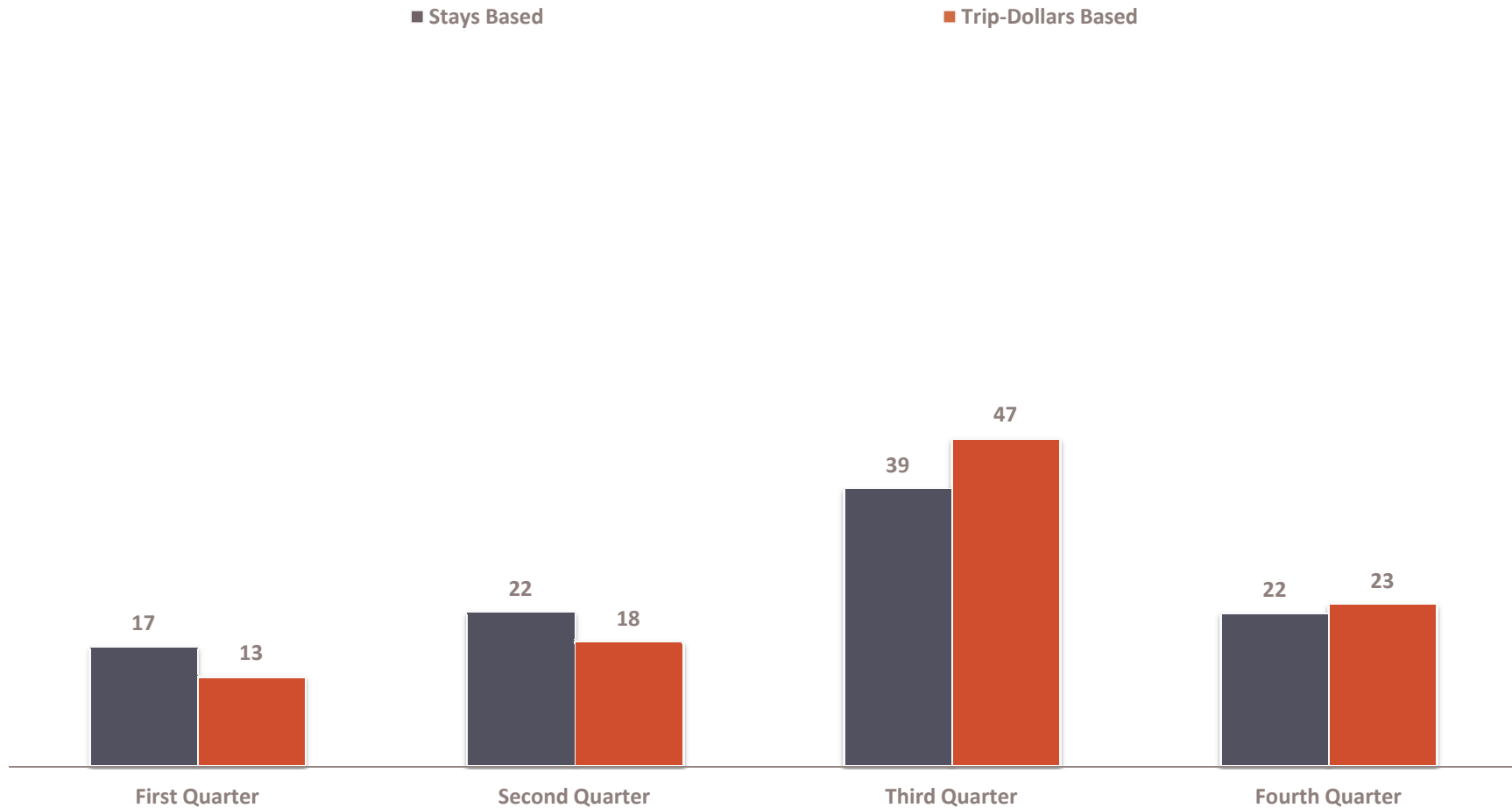


Chart 32 • Segment: 2009-2011 Overnight Leisure (%) • New Jersey N = 4,153 household count

Trip Timing by Season: U.S., New Jersey and Comp Set

TRIP TIMING

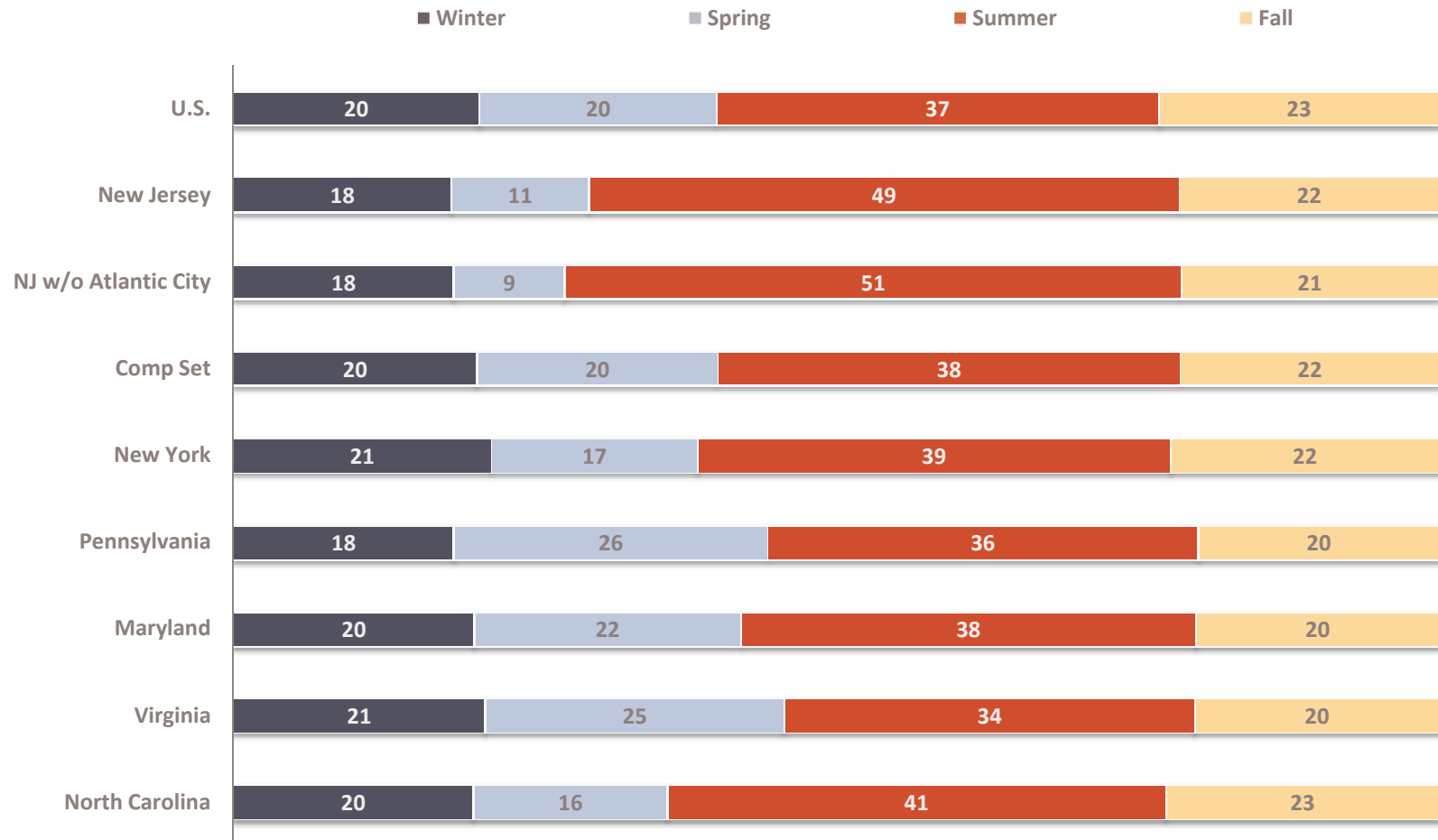


Chart 33 • Segment: 2009-2011 Overnight Leisure Person-Stays (%) • New Jersey N = 1,112 household count

New Jersey Avg. Party per Trip Spending by Season

TRIP TIMING

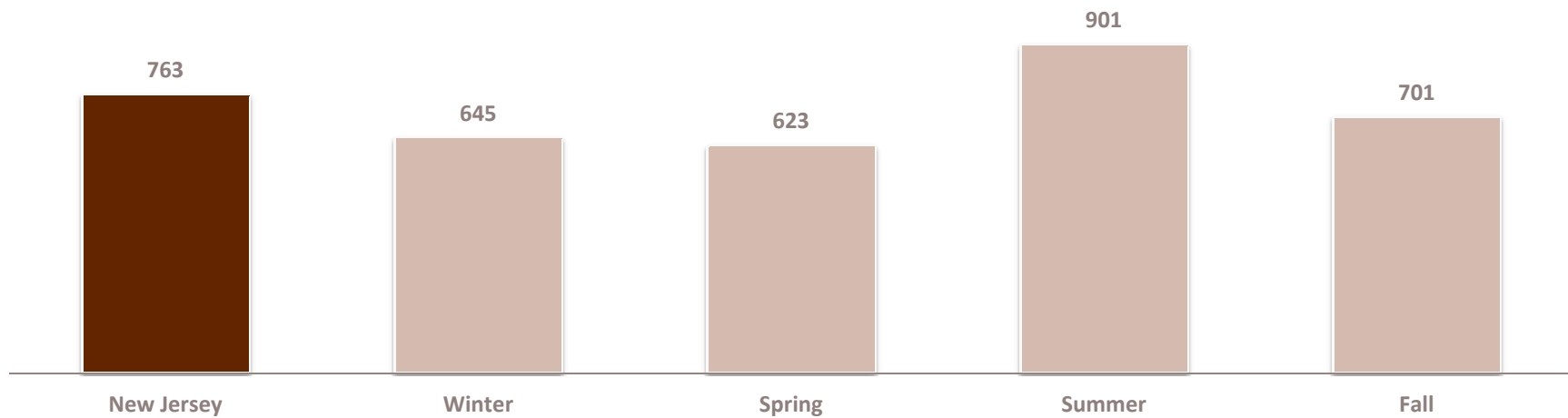


Chart 34 • Segment: 2009-2011 Overnight Leisure Stays (\$) • New Jersey N = 3,117 household count

New Jersey Trip Timing Comparison by Season

TRIP TIMING

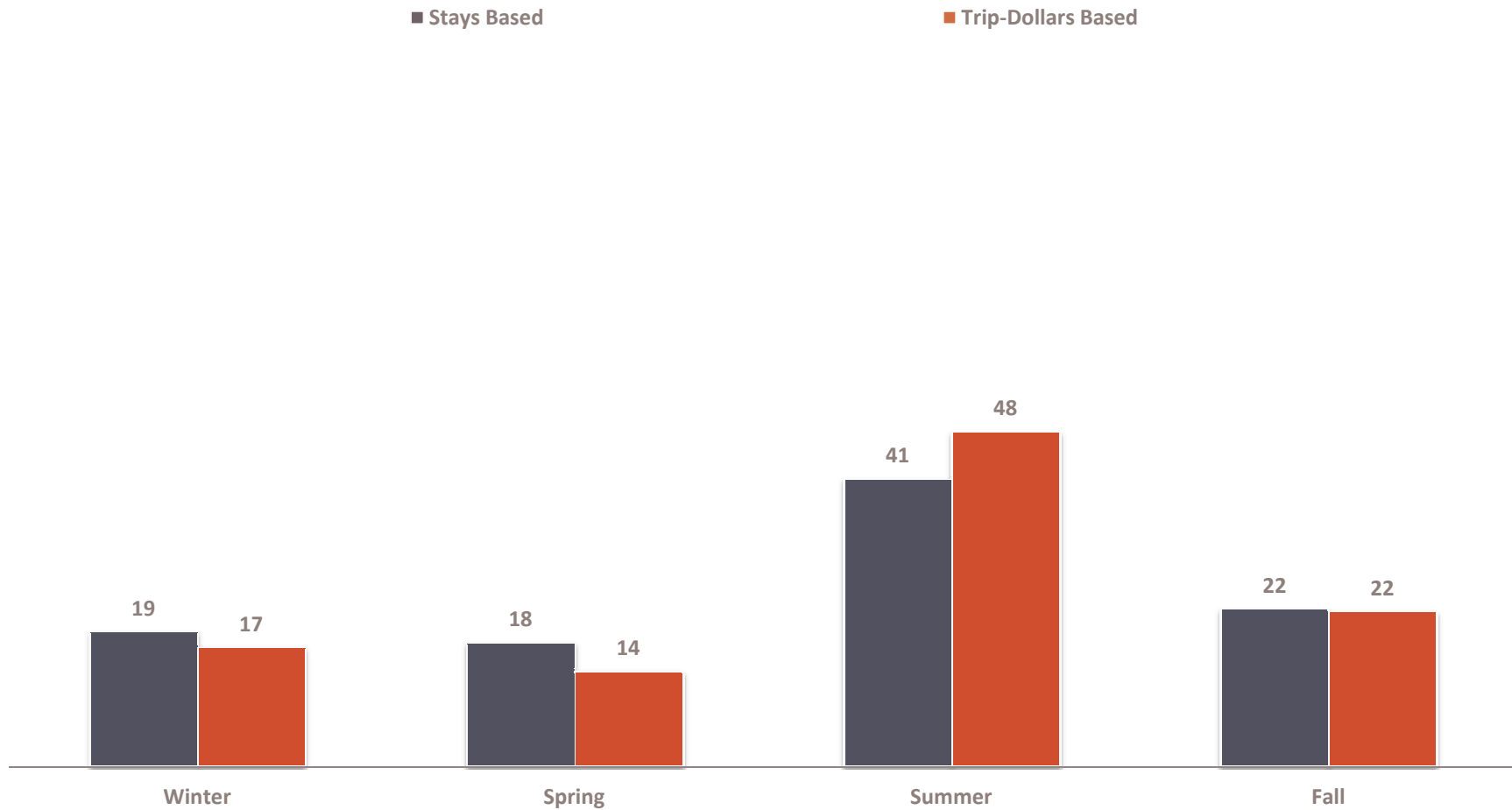


Chart 35 • Segment: 2009-2011 Overnight Leisure (%) • New Jersey N = 4,153 household count

Purpose of Stay Distribution: U.S., New Jersey and Comp Set

TRIP CHARACTERISTICS

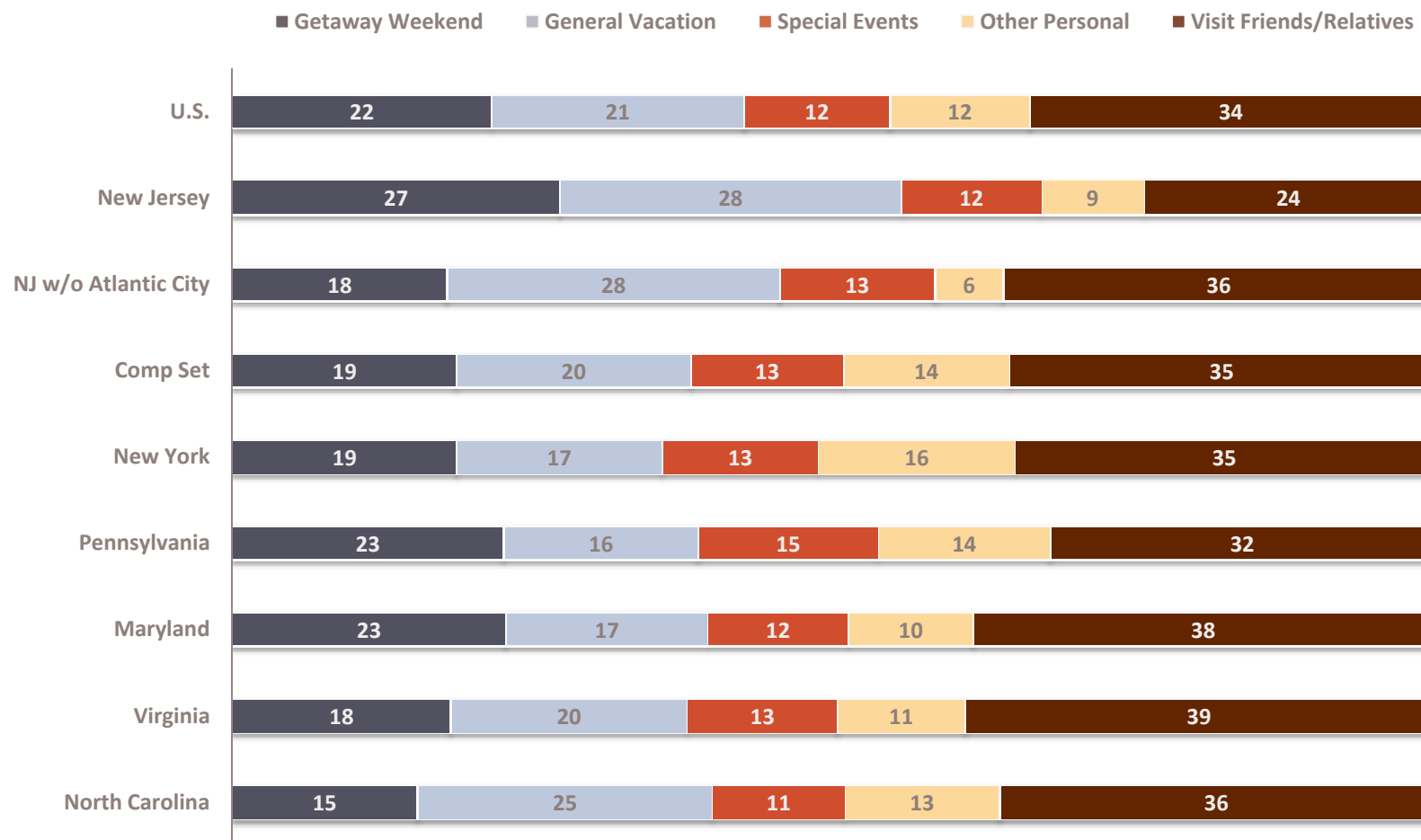


Chart 36 • Segment: 2011 Overnight Leisure Person-Stays (%) • New Jersey N = 1,112 household count

New Jersey Avg. Party per Trip Spending by Purpose of Stay

TRIP CHARACTERISTICS

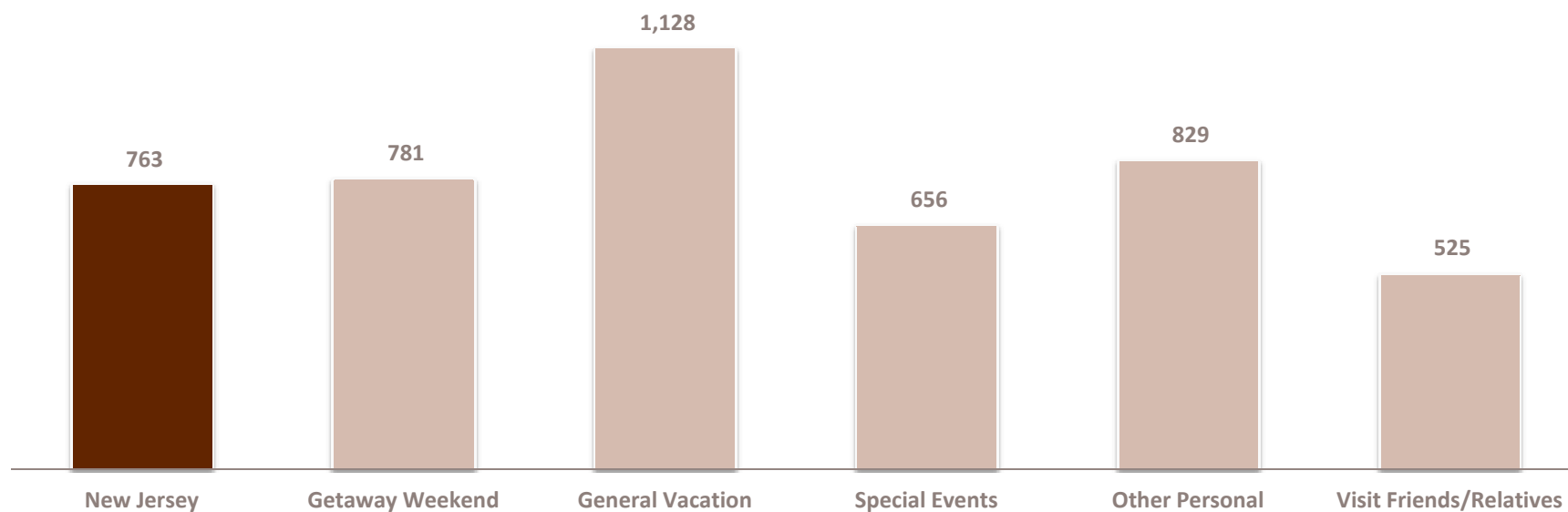


Chart 37 • Segment: 2009-2011 Overnight Leisure Stays (\$) • New Jersey N = 3,117 household count

New Jersey Purpose of Stay Comparison

TRIP CHARACTERISTICS

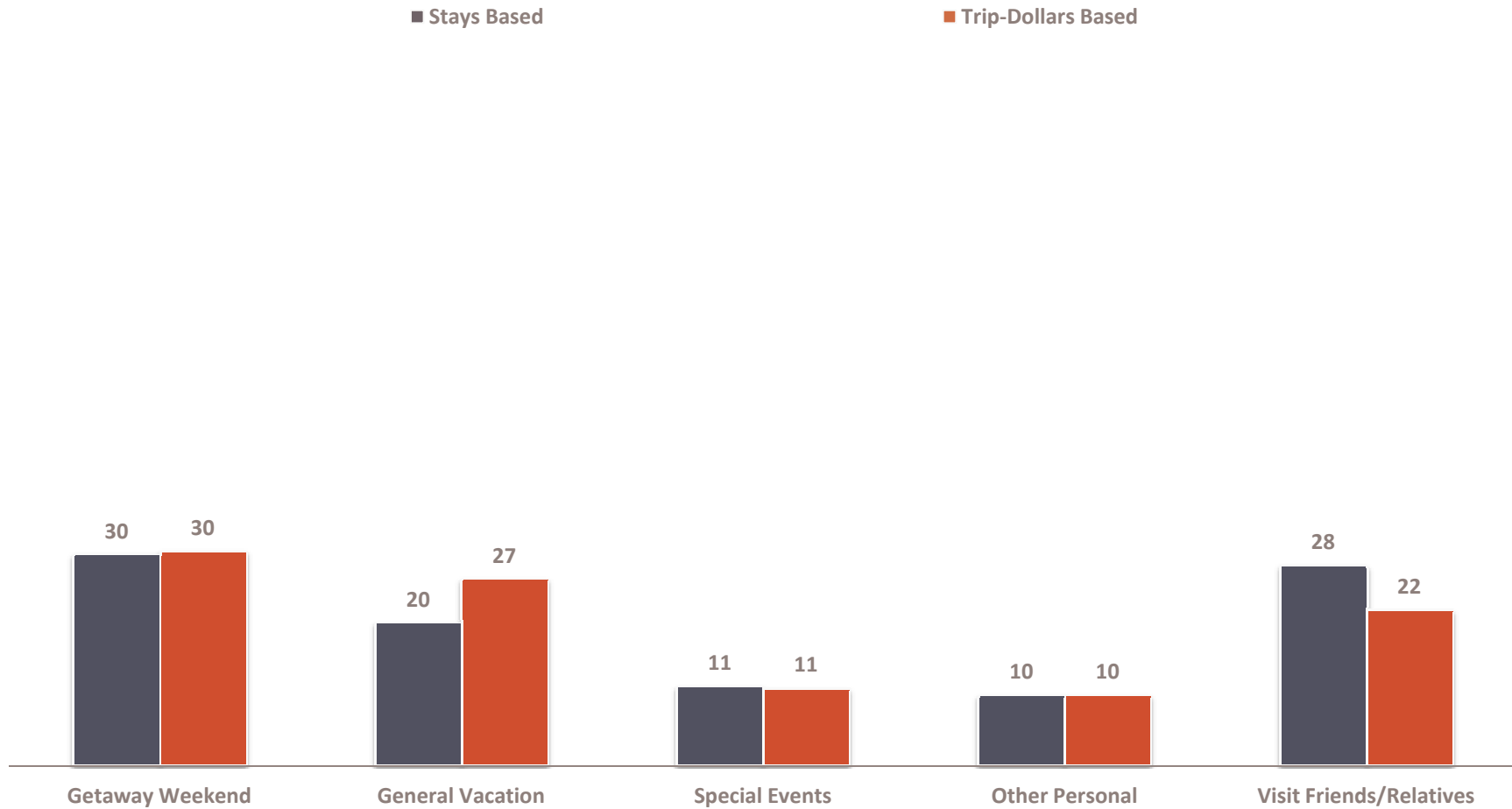


Chart 38 • Segment: 2009-2011 Overnight Leisure (%) • New Jersey N = 4,153 household count

Travel Party Composition: U.S., New Jersey and Comp Set

TRIP CHARACTERISTICS

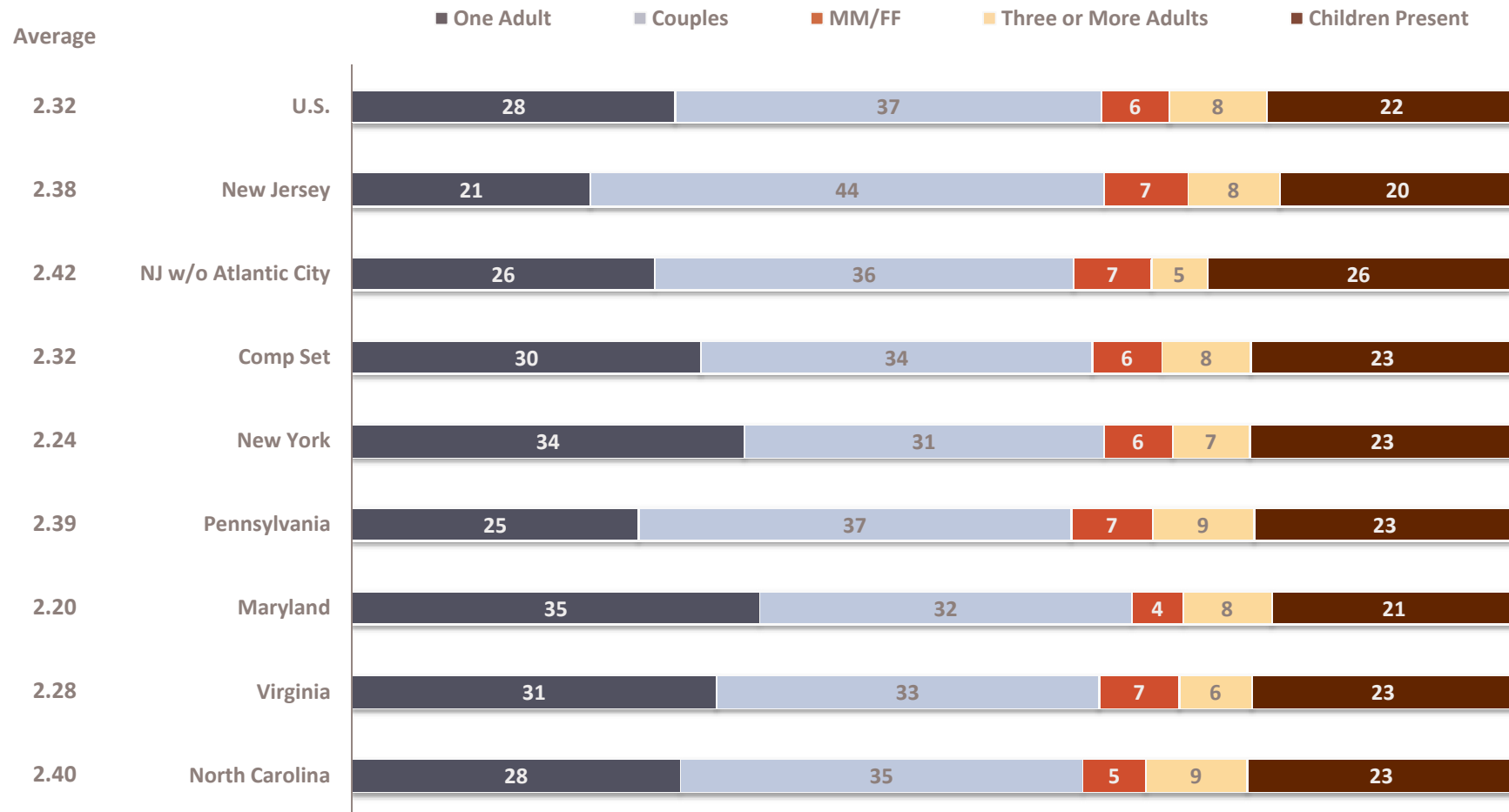


Chart 39 • Segment: 2011 Overnight Leisure Stays (%) • New Jersey N = 1,009 household count

GLOSSARY

Children Present

Is defined as one or more adults accompanied by one or more persons under age 18. The child necessarily has to live in the household.

MM/FF

Include either two females or two males from different households traveling together.

Average Travel Party Size Overview: U.S., New Jersey and Comp Set

TRIP CHARACTERISTICS

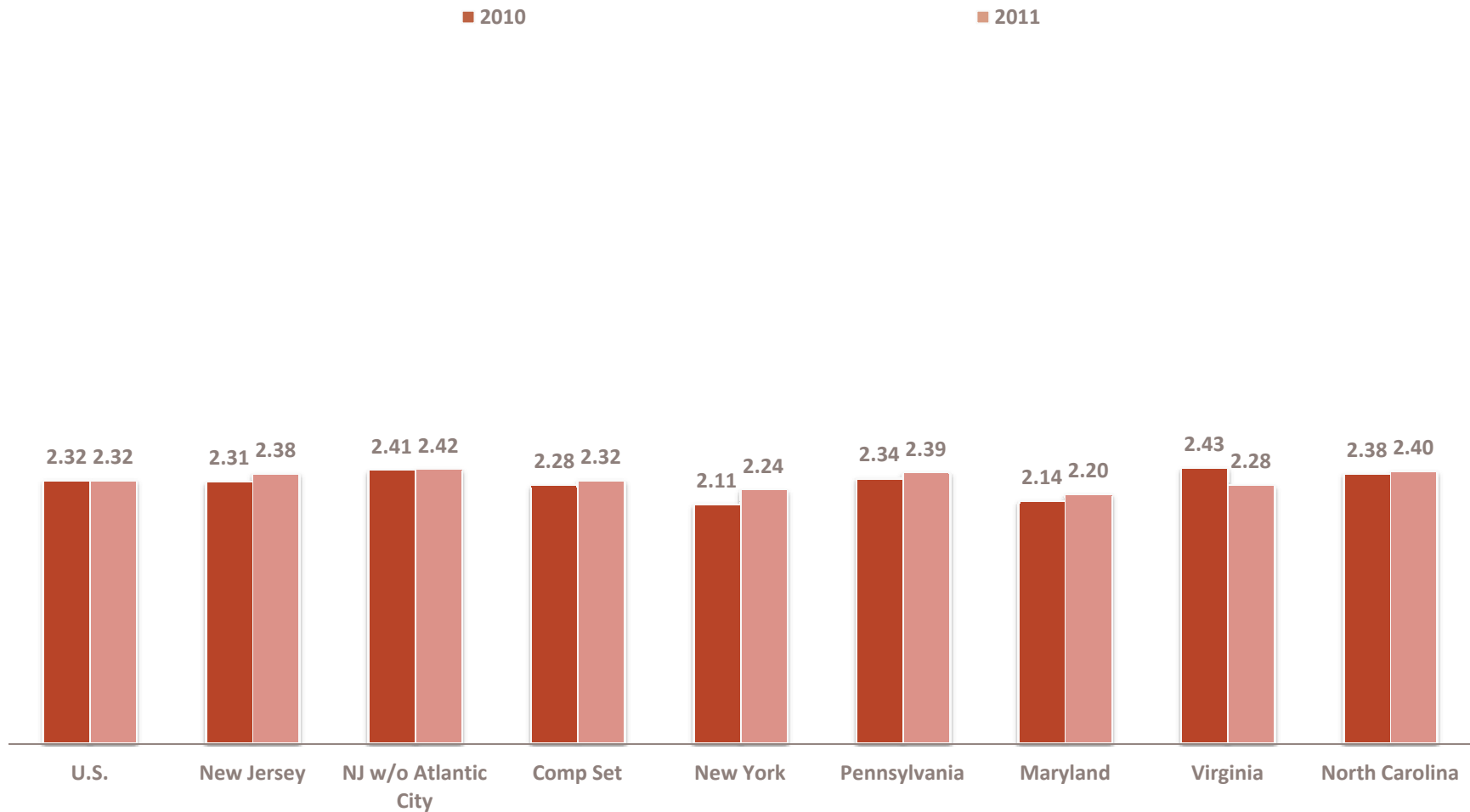


Chart 40 • Segment: 2010/2011 Overnight Leisure Stays • New Jersey N = 1,009 household count

New Jersey Avg. Party per Trip Spending by Travel Party Composition

TRIP CHARACTERISTICS

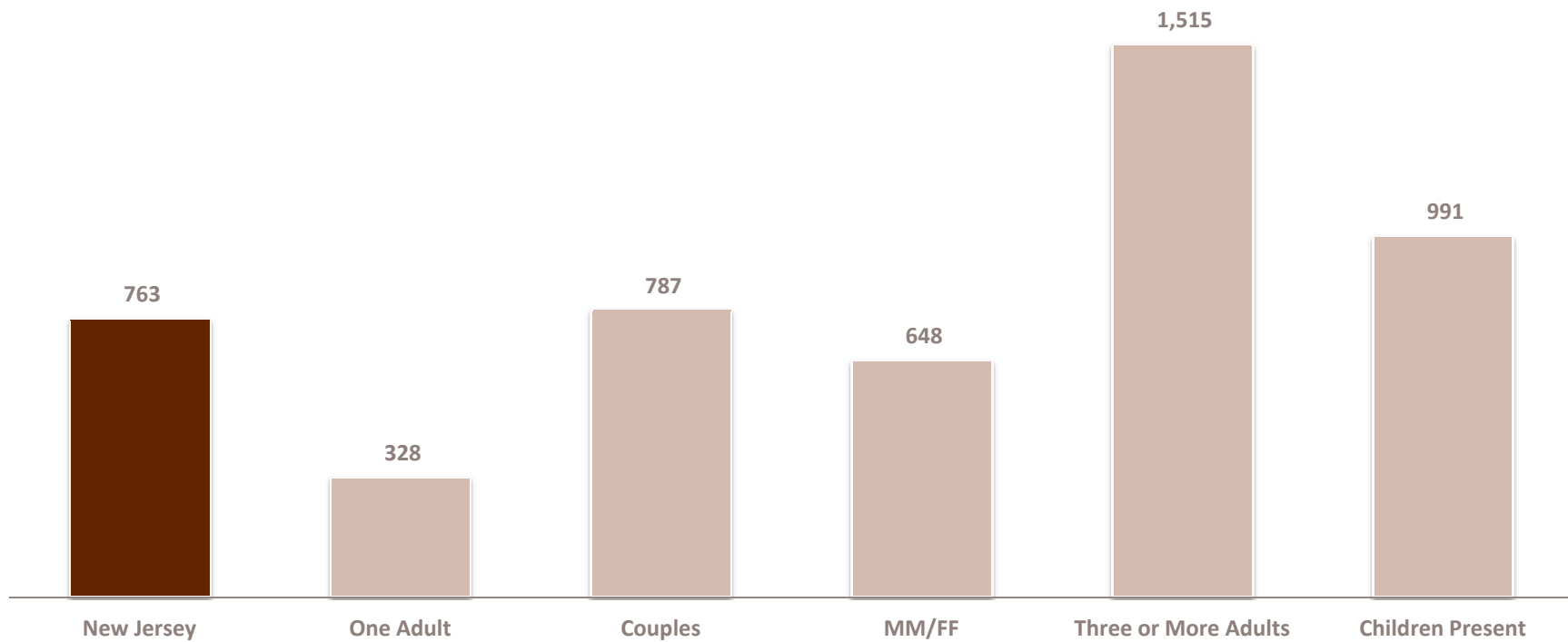


Chart 41 • Segment: 2009-2011 Overnight Leisure Stays (\$) • New Jersey N = 3,117 household count

New Jersey Travel Party Comparison

TRIP CHARACTERISTICS

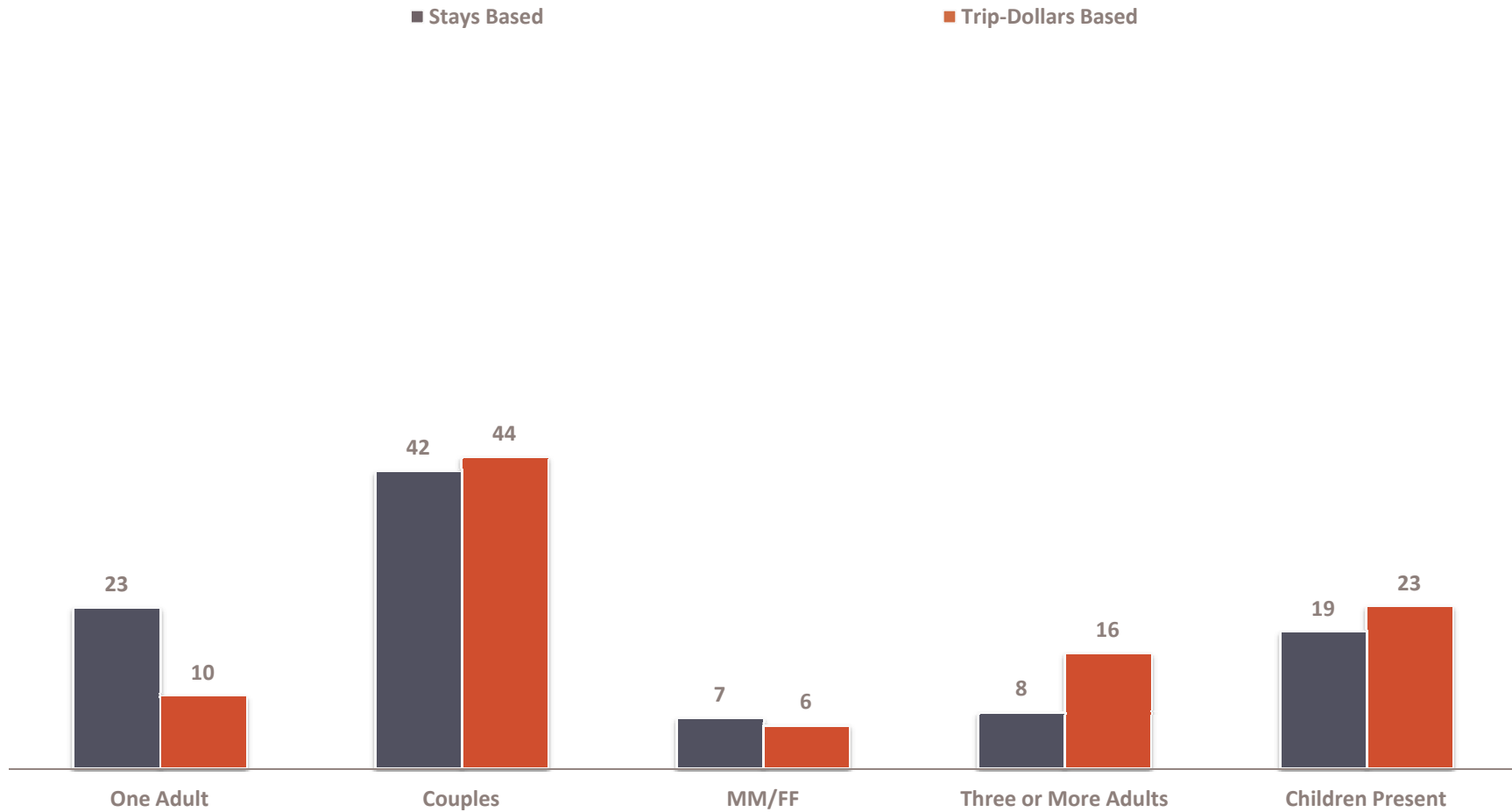


Chart 42 • Segment: 2009-2011 Overnight Leisure (%) • New Jersey N = 3,399 household count

Stay Length Distribution: U.S., New Jersey and Comp Set

TRIP CHARACTERISTICS

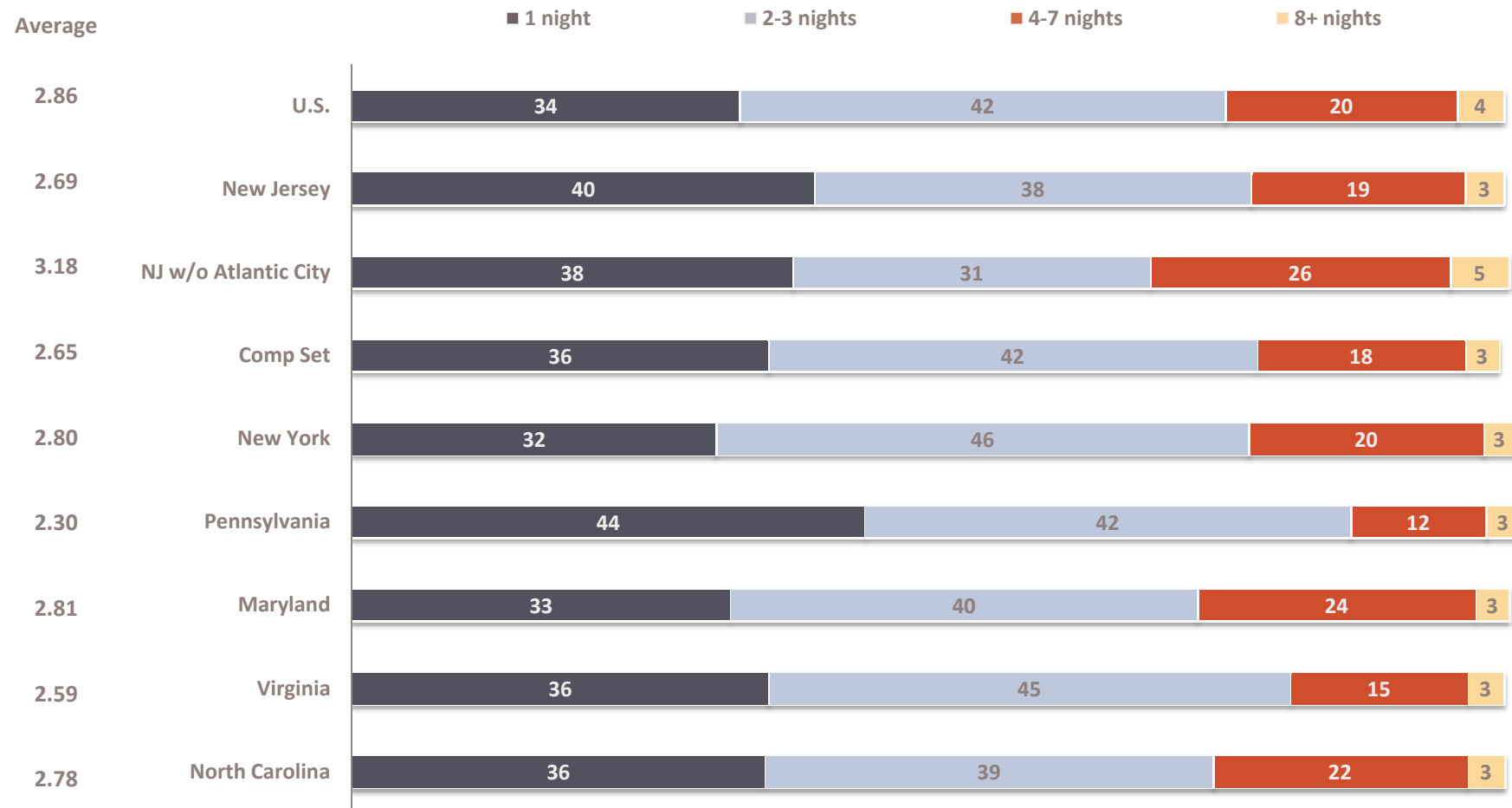


Chart 43 • Segment: 2011 Overnight Leisure Stays (%) • New Jersey N = 1,112 household count

Average Stay Length Overview: U.S., New Jersey and Comp Set

TRIP CHARACTERISTICS

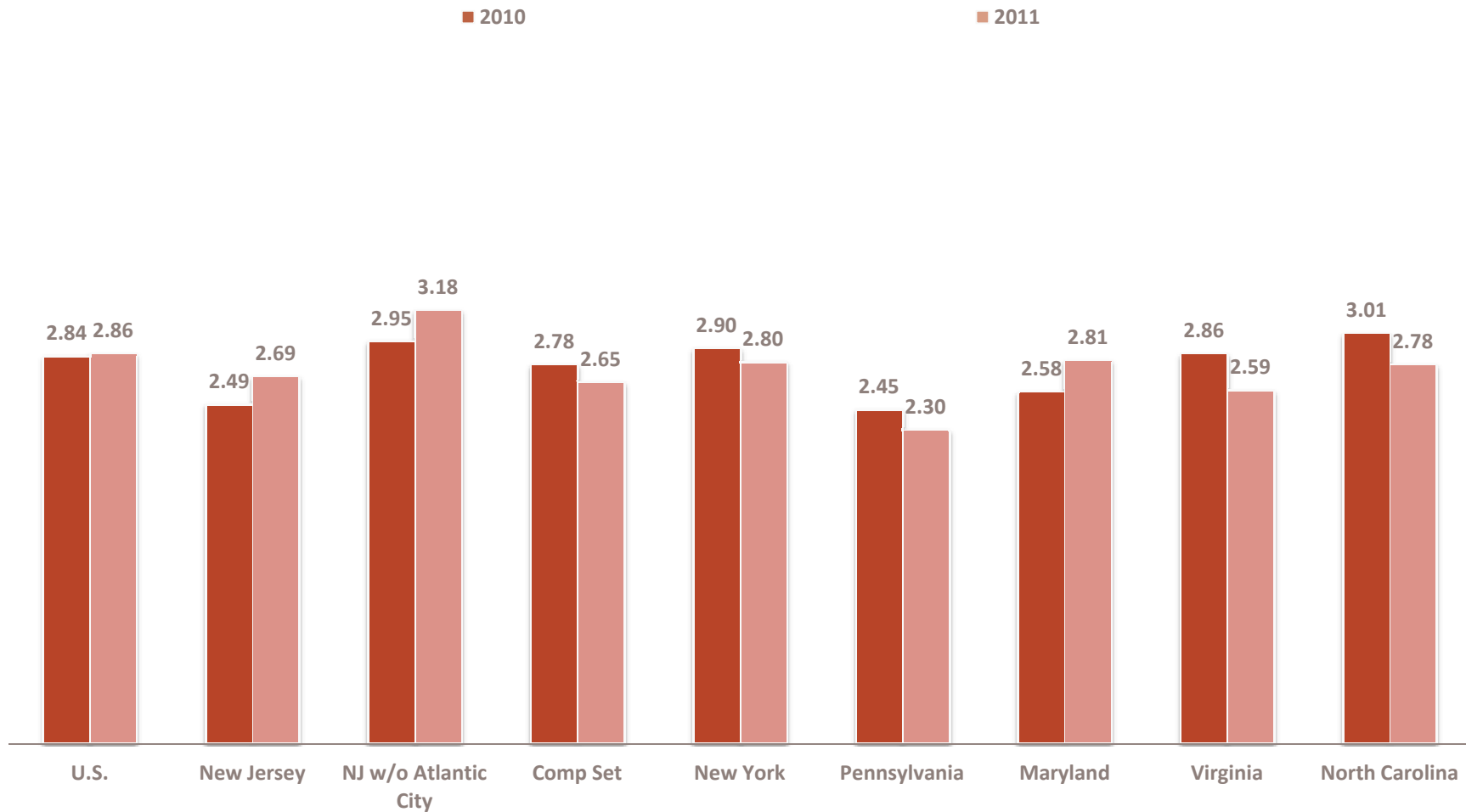


Chart 44 • Segment: 2010/2011 Overnight Leisure Stays • New Jersey N = 1,112 household count

New Jersey Avg. Party per Trip Spending by Stay Length

TRIP CHARACTERISTICS

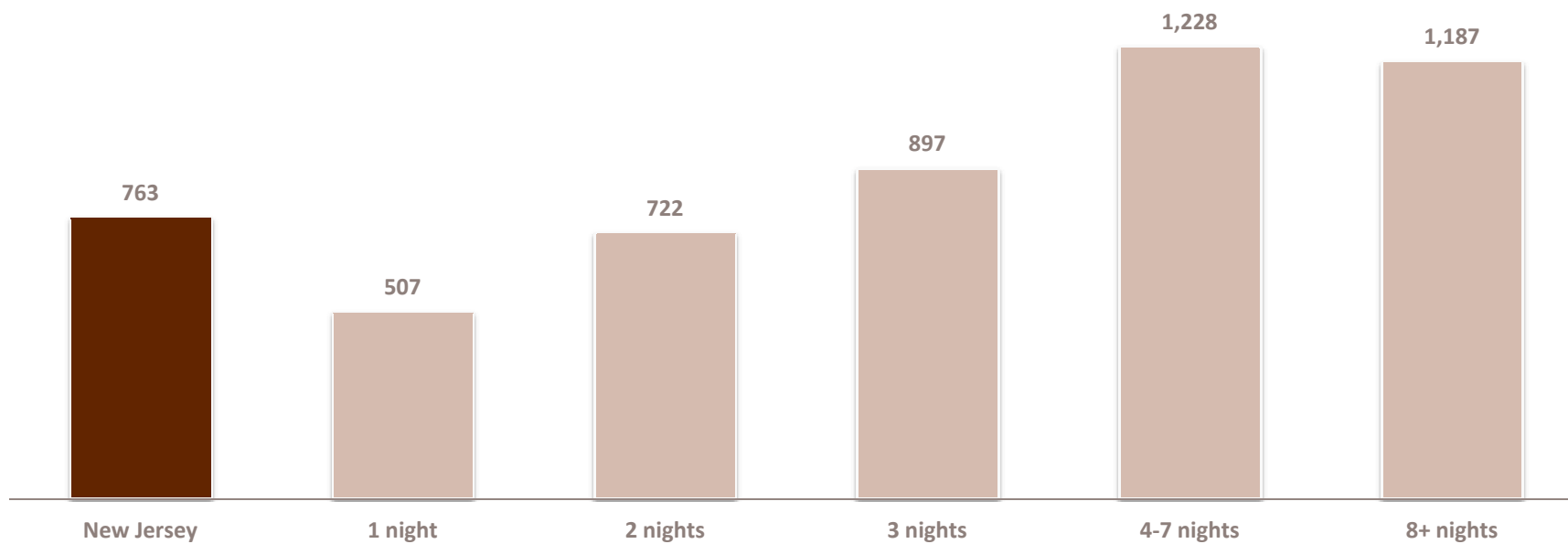


Chart 45 • Segment: 2009-2011 Overnight Leisure Stays (\$) • New Jersey N = 3,117 household count

New Jersey Stay Length Comparison

TRIP CHARACTERISTICS

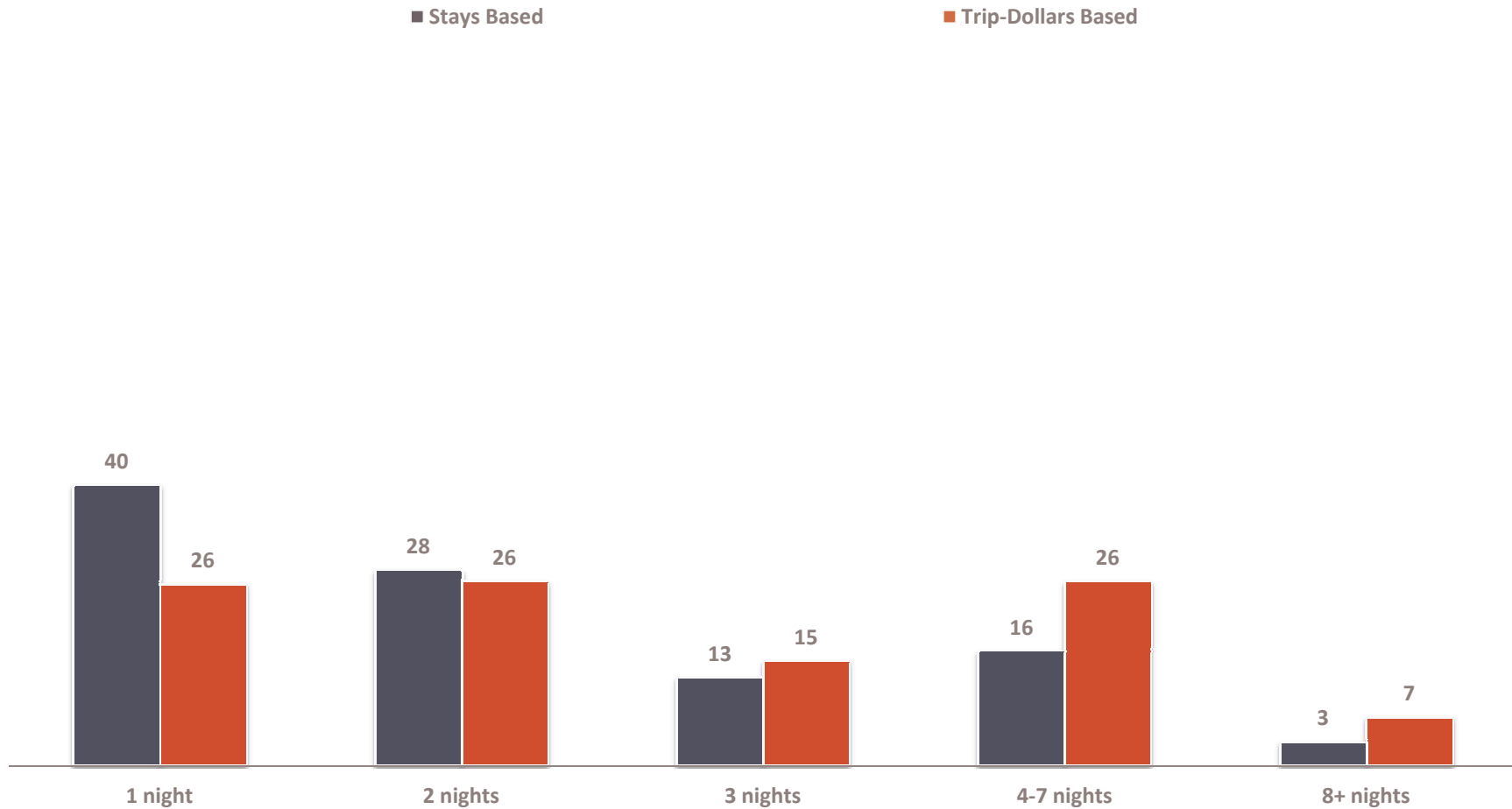


Chart 46 • Segment: 2009-2011 Overnight Leisure (%) • New Jersey N = 4,153 household count

Daily Spending Per Person by Category: U.S., New Jersey and Comp Set

TRIP CHARACTERISTICS

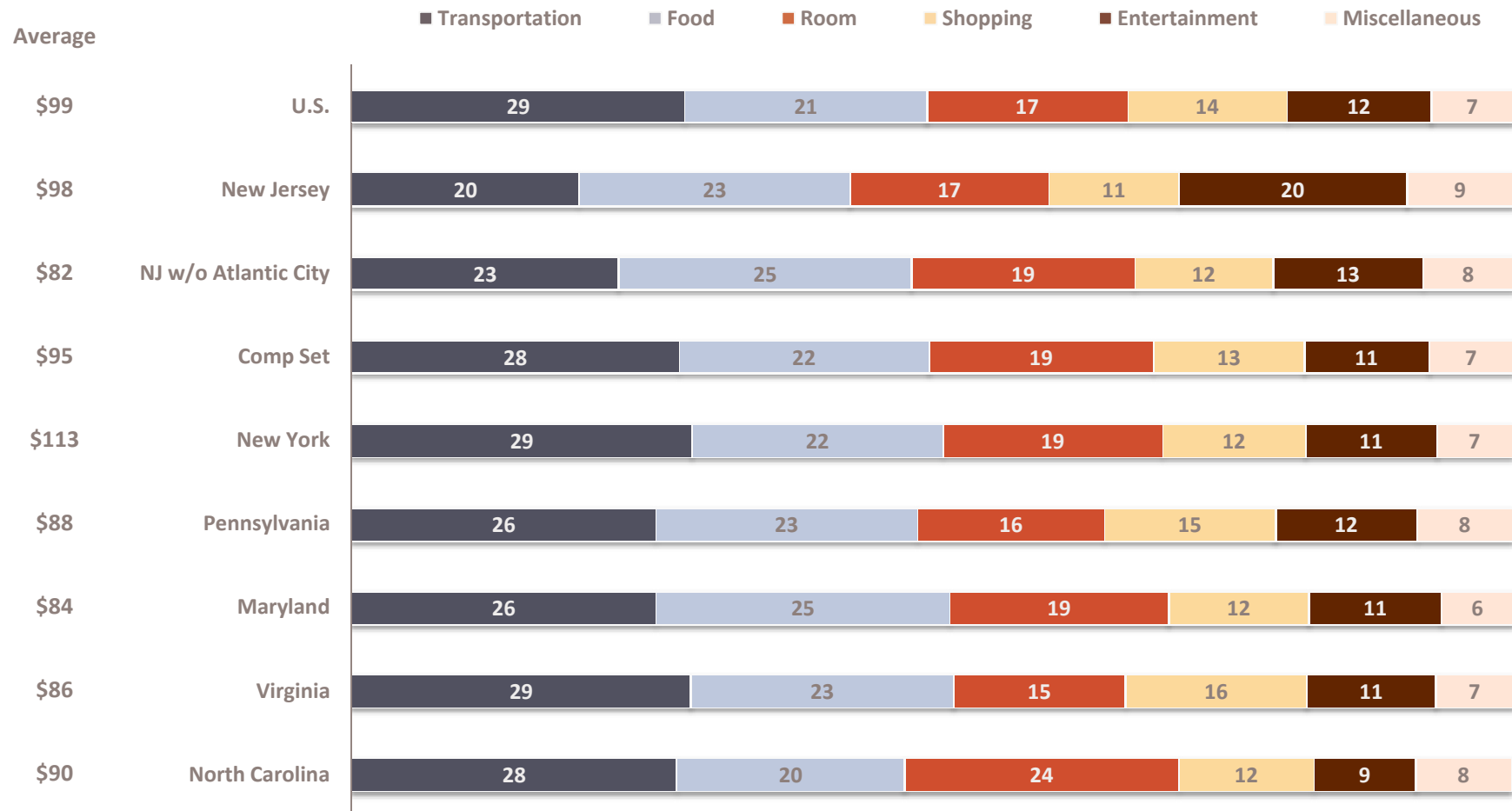


Chart 47 • Segment: 2011 Overnight Leisure Person-Days (%) • New Jersey N = 1,050 household count

Daily Spending Per Person by Category: U.S., New Jersey and Comp Set

TRIP CHARACTERISTICS

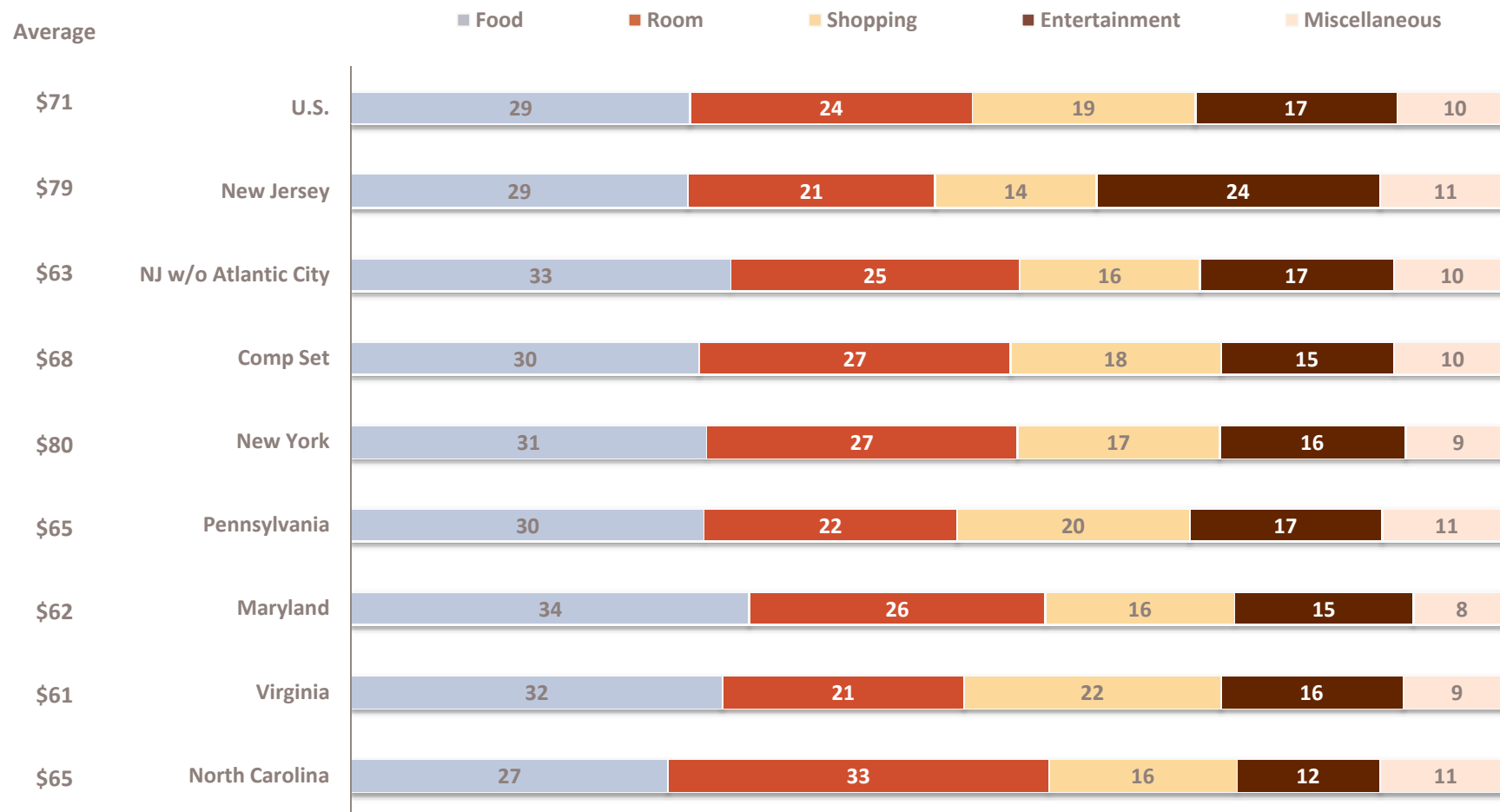


Chart 48 • Segment: 2011 Overnight Leisure Person-Days (%) • New Jersey N = 1,050 household count

Top Activities at the Destination

ACTIVITY PARTICIPATION

	U.S.	New Jersey	NJ w/o Atlantic City	Comp Set	New York	Pennsylvania	Maryland	Virginia	North Carolina
Dining*	26%	33%	28%	26%	28%	28%	27%	24%	26%
Beach, Waterfront	18%	33%	33%	15%	10%	5%	21%	17%	25%
Gamble	8%	32%	5%	3%	3%	6%	2%	1%	2%
Entertainment*	21%	28%	18%	19%	21%	23%	16%	17%	15%
Shopping*	23%	21%	16%	21%	22%	22%	17%	19%	22%
Night Life	10%	16%	6%	8%	11%	7%	12%	6%	5%
Concert, Play, Dance	11%	13%	11%	10%	11%	10%	8%	9%	8%
Sightseeing	17%	10%	13%	15%	17%	14%	12%	16%	15%
Hike, Bike	8%	5%	8%	7%	10%	7%	5%	4%	8%
Theme Park, Amusement Park	7%	6%	7%	4%	2%	9%	3%	7%	2%
National or State Parks	11%	5%	8%	12%	15%	10%	9%	10%	11%
Hunt, Fish	4%	4%	4%	5%	4%	4%	5%	3%	9%

Chart 49 • Segment: 2011 Overnight Leisure Stays (%) • New Jersey N = 1,112 household count

GLOSSARY

Entertainment These activities are based on minimum spending levels : Entertainment (>\$10), Dining (>\$20), Shopping (>\$20). All other activity incidence is based on activities selected from a list.

Dining Note that the sum of all activity participation exceeds 100% as a function of the survey, whereby up to four activities per stay may be selected.

Shopping

Top Activities at the Destination

ACTIVITY PARTICIPATION

	U.S.	New Jersey	NJ w/o Atlantic City	Comp Set	New York	Pennsylvania	Maryland	Virginia	North Carolina
Visit Historic Site	10%	4%	6%	12%	13%	11%	11%	14%	11%
Museum, Art Exhibit	8%	3%	3%	9%	13%	8%	7%	8%	5%
Golf	2%	3%	3%	2%	1%	2%	2%	3%	3%
Festival, Craft Fair	5%	2%	3%	4%	5%	6%	2%	3%	4%
Boat, Sail	3%	2%	3%	3%	3%	3%	2%	3%	3%
Nature, Eco-Travel	1%	1%	2%	2%	2%	2%	1%	1%	1%
Watch Sports	3%	1%	1%	3%	2%	5%	4%	1%	2%
Look at Real Estate	1%	1%	1%	1%	0%	0%	0%	0%	3%
Shows (auto, boat, antique, etc.)	0%	0%	0%	0%	1%	0%	0%	0%	0%
Camping	2%	0%	0%	2%	3%	3%	2%	1%	1%
Group Tour	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other Adventure Sports	1%	0%	0%	1%	0%	1%	1%	1%	0%

Chart 50 • Segment: 2011 Overnight Leisure Stays (%) • New Jersey N = 1,112 household count

New Jersey Activity Index

ACTIVITY PARTICIPATION

The activity index uses the U.S. to determine the average of 100 and anything above is an activity that travelers in New Jersey are more likely to do than visitors to the U.S. The Index is different from the share of participation in that it only reflects a traveler's propensity to participate in an activity, relative to the propensity for average U.S. destinations.

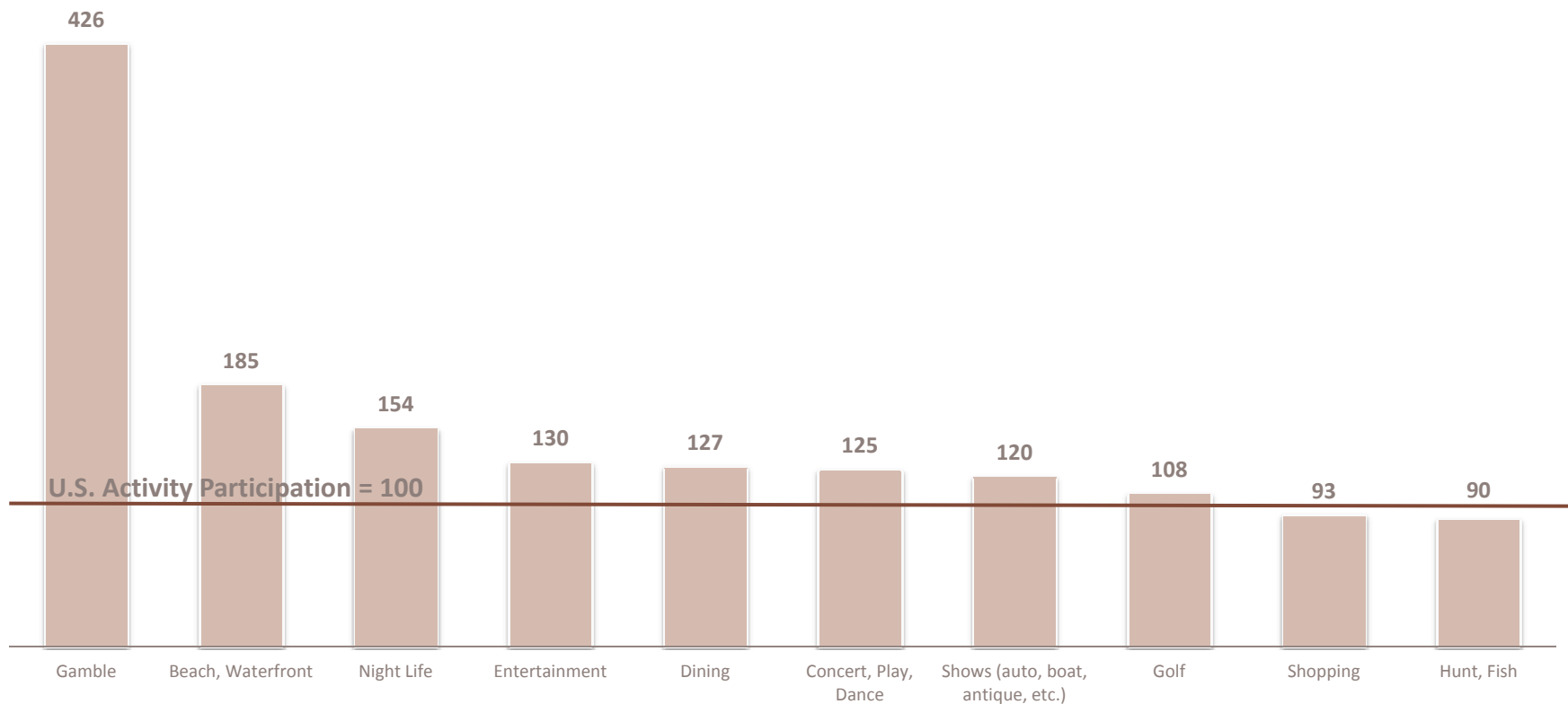


Chart 51 • Segment: 2011 Overnight Leisure Stays • New Jersey N = 1,112 household count

New Jersey Avg. Party per Trip Spending by Activities

ACTIVITY PARTICIPATION

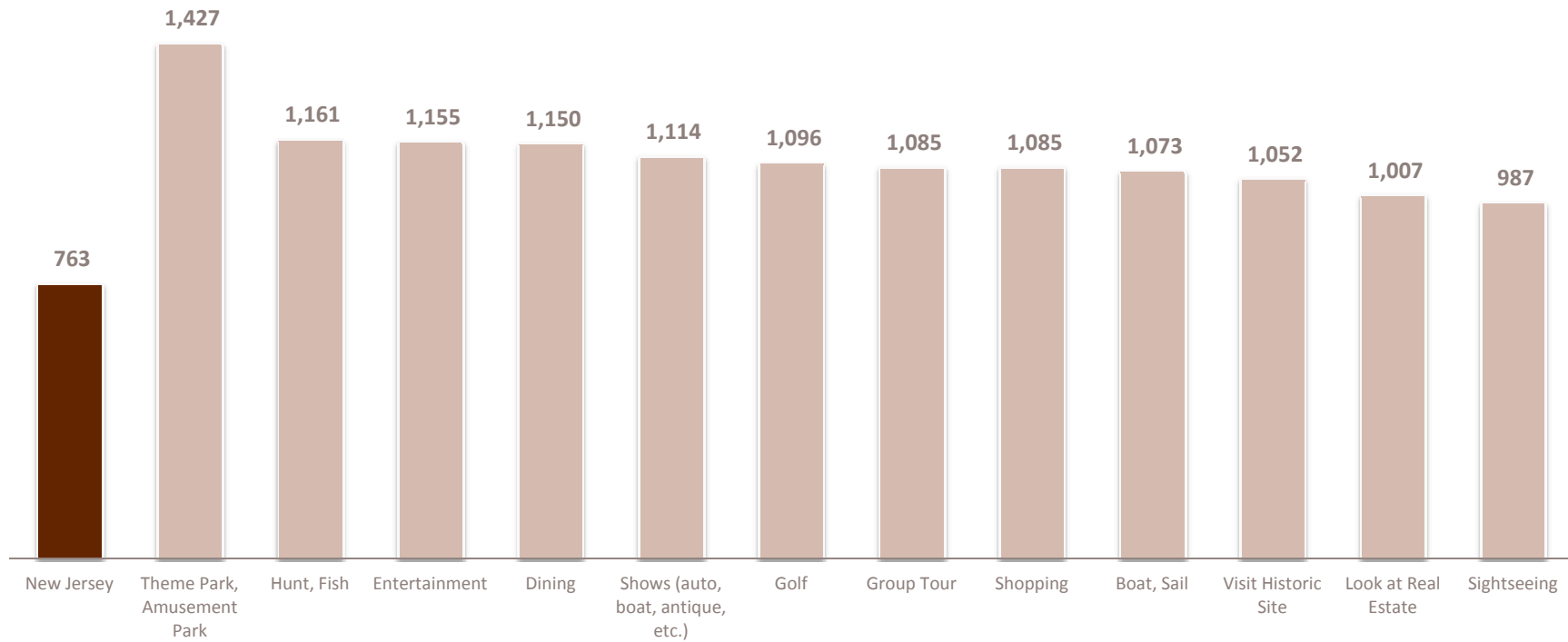


Chart 52 • Segment: 2009-2011 Overnight Leisure Stays (\$) • New Jersey N = 3,117 household count

New Jersey Avg. Party per Trip Spending by Activities (cont.)

ACTIVITY PARTICIPATION

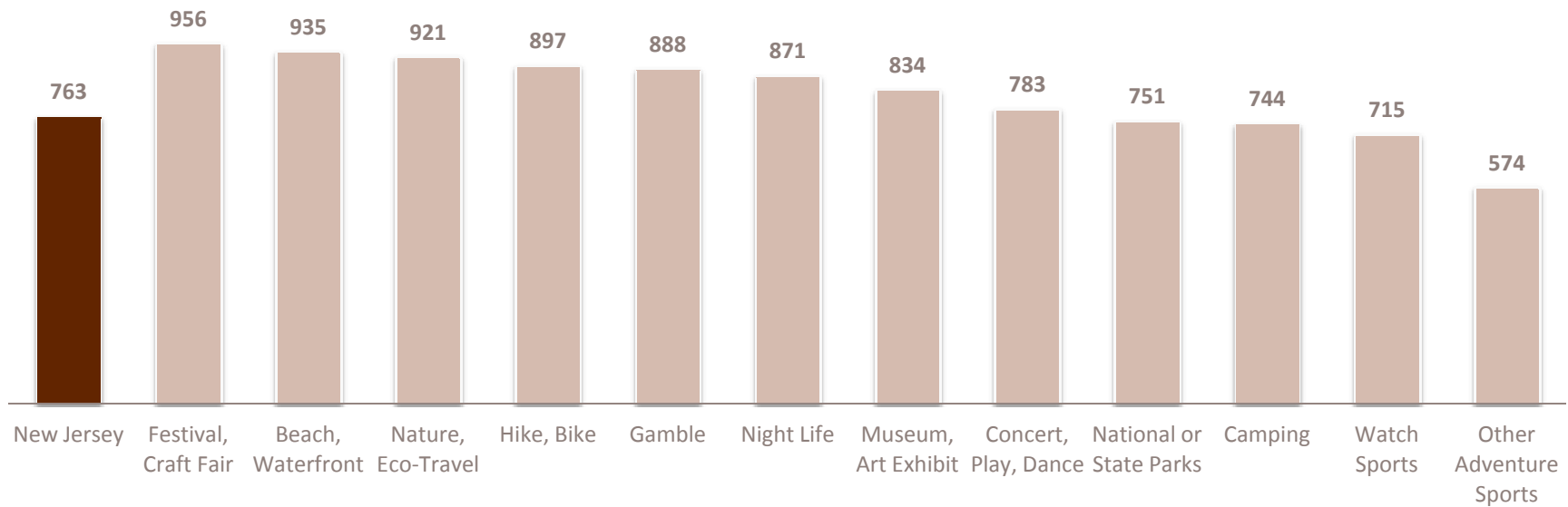


Chart 53 • Segment: 2009-2011 Overnight Leisure Stays (\$) • New Jersey N = 3,117 household count

New Jersey Activity Comparison

ACTIVITY PARTICIPATION

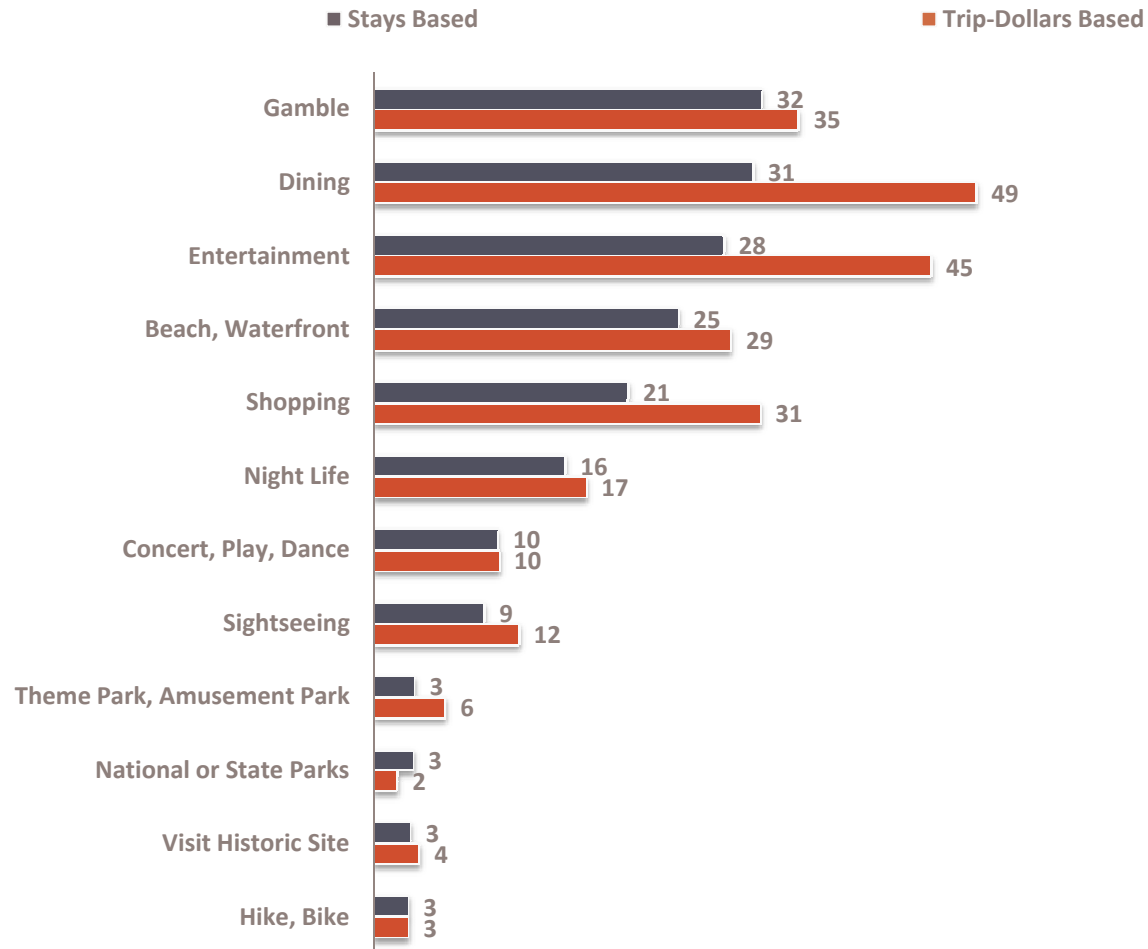


Chart 54 • Segment: 2009-2011 Overnight Leisure (%) • New Jersey N = 4,153 household count

New Jersey Activity Comparison (cont.)

ACTIVITY PARTICIPATION

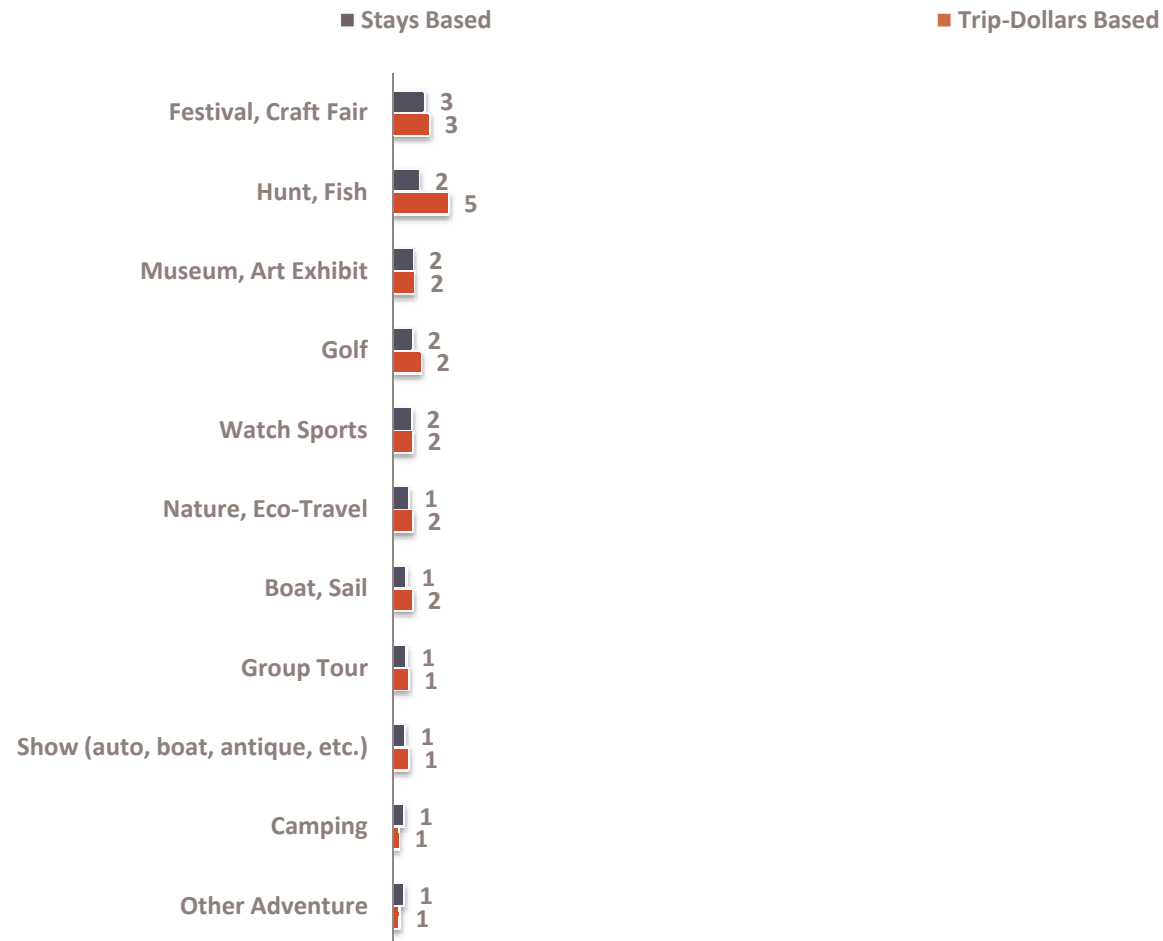


Chart 55 • Segment: 2009-2011 Overnight Leisure (%) • New Jersey N = 4,153 household count

Accommodation Type: U.S., New Jersey and Comp Set

ACCOMMODATION

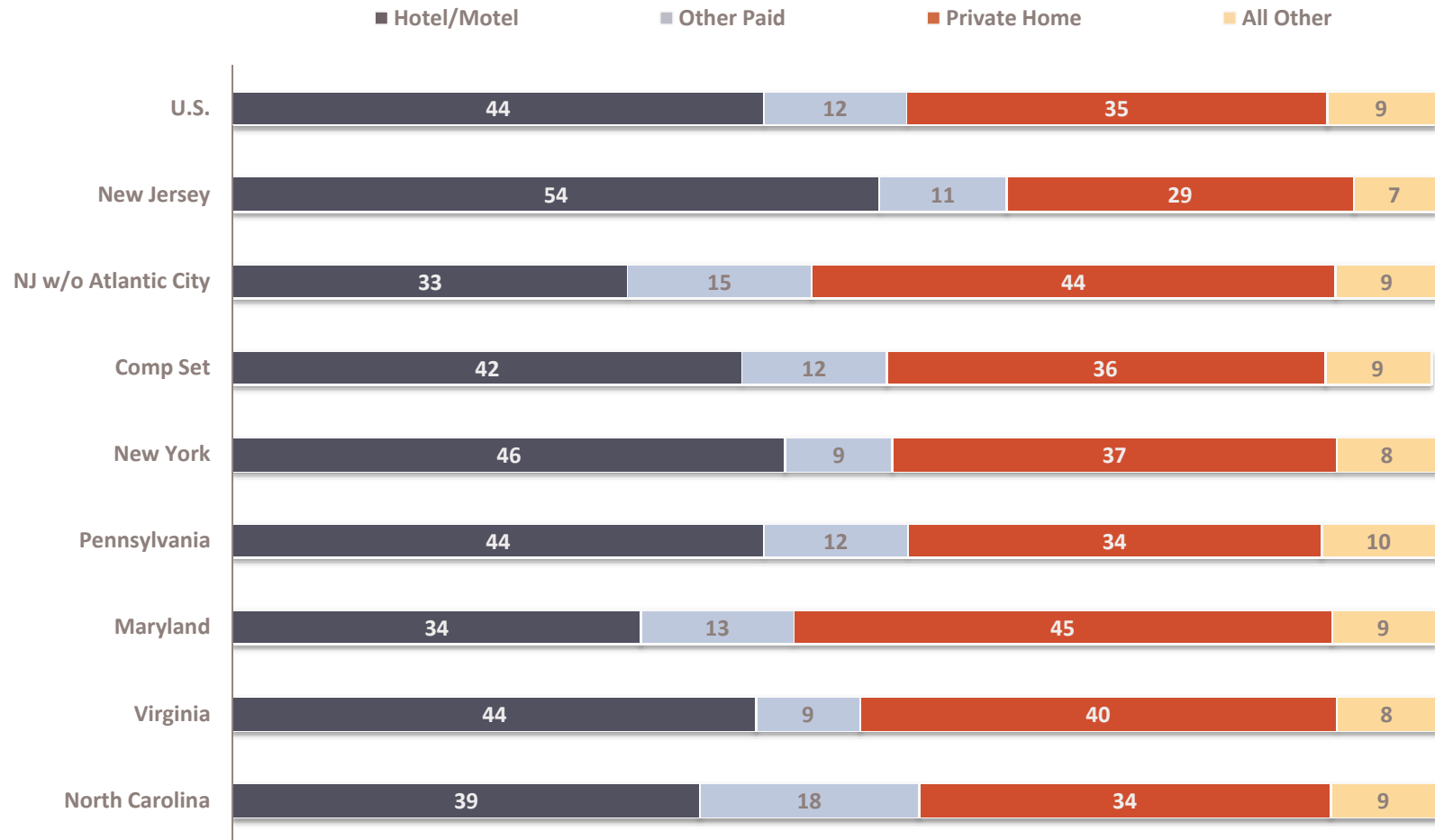


Chart 56 • Segment: 2011 Overnight Leisure Stays (%) • New Jersey N = 1,112 household count

New Jersey Avg. Party per Trip Spending by Accommodation Type

ACCOMMODATION

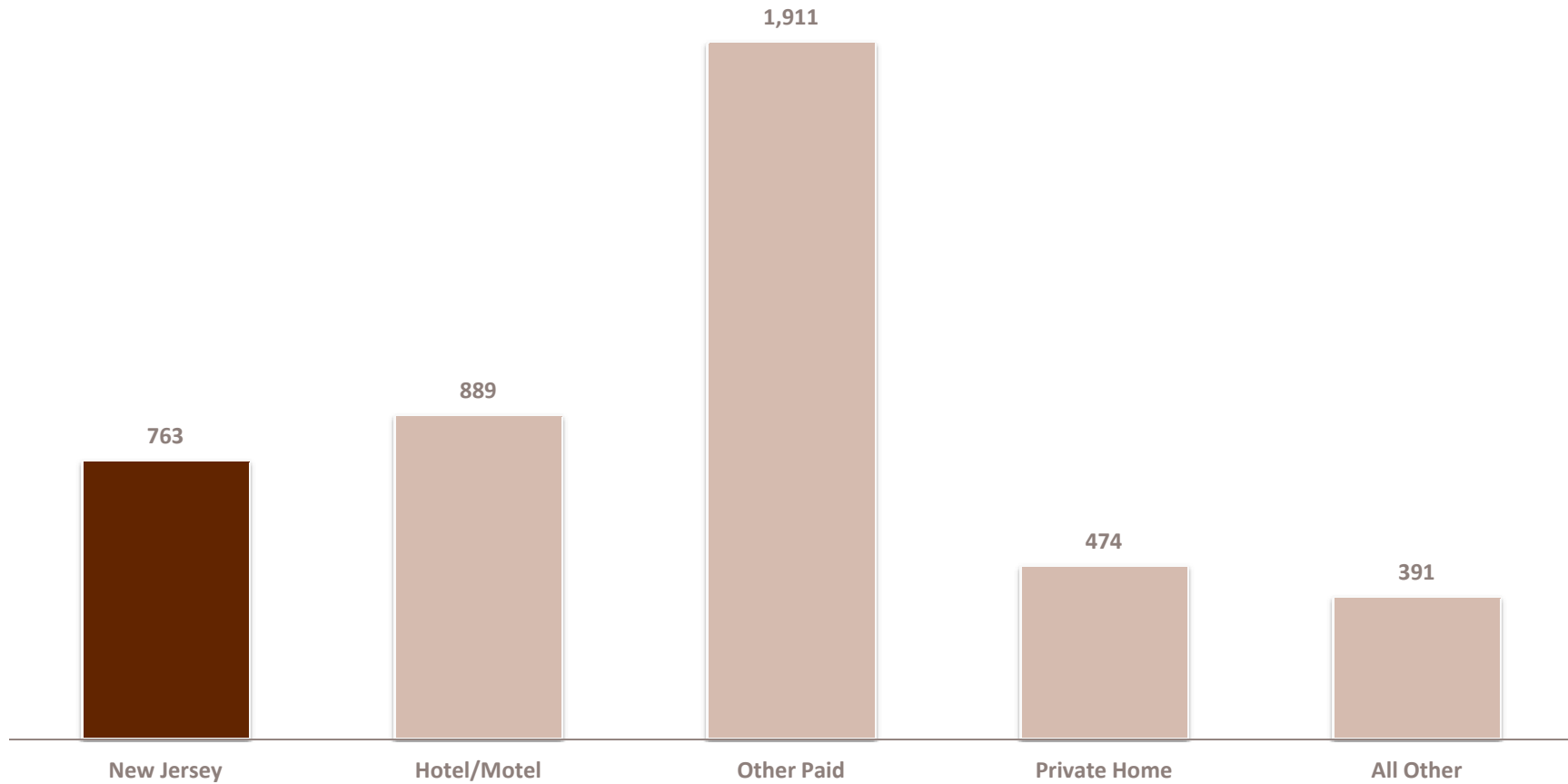


Chart 57 • Segment: 2009-2011 Overnight Leisure Stays (\$) • New Jersey N = 3,117 household count

New Jersey Accommodation Type Comparison

ACCOMMODATION

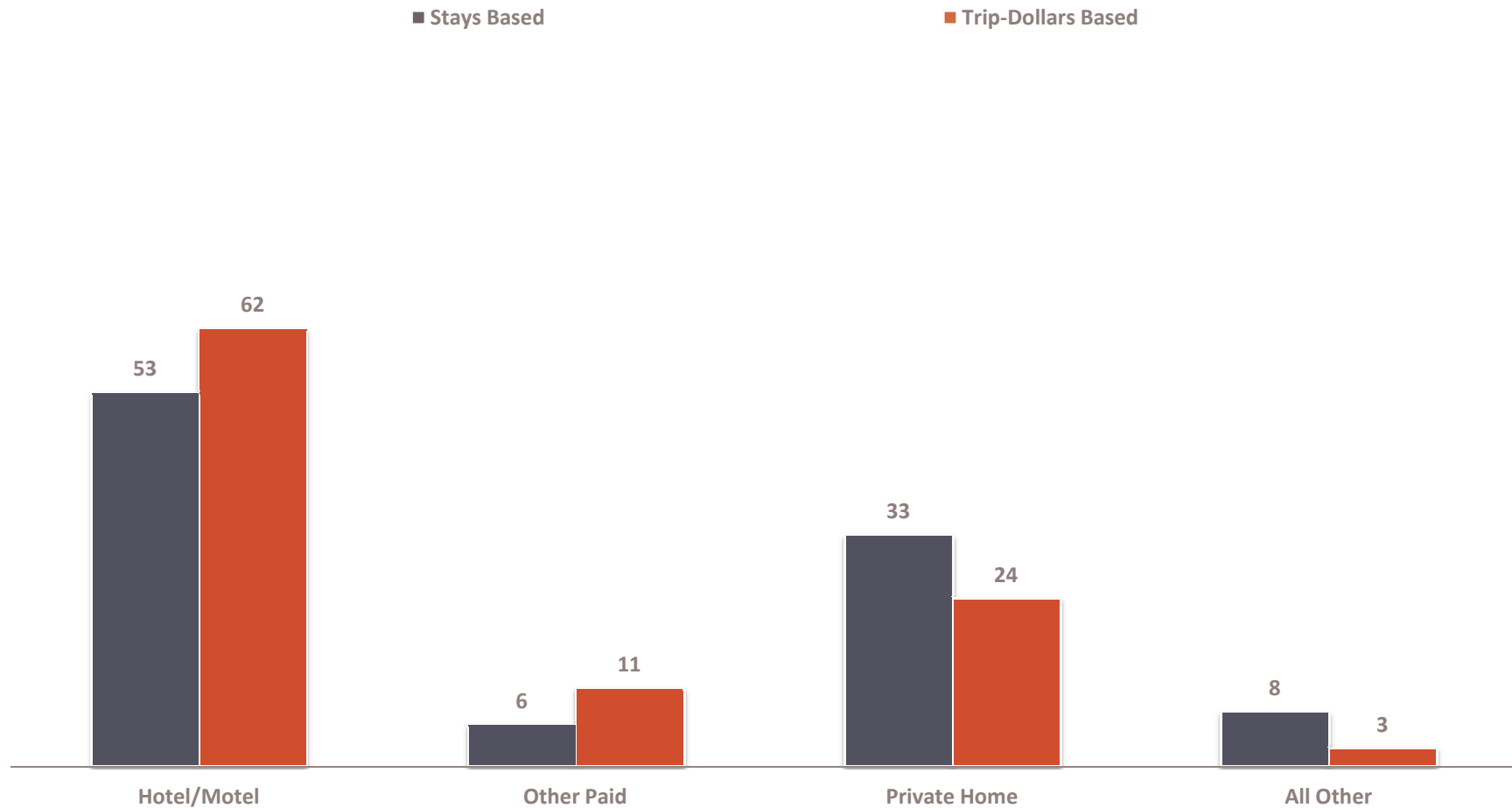


Chart 58 • Segment: 2009-2011 Overnight Leisure (\$) • New Jersey N = 4,153 household count

Excellent Destination Satisfaction vs. Value Ratings

DESTINATION RATINGS

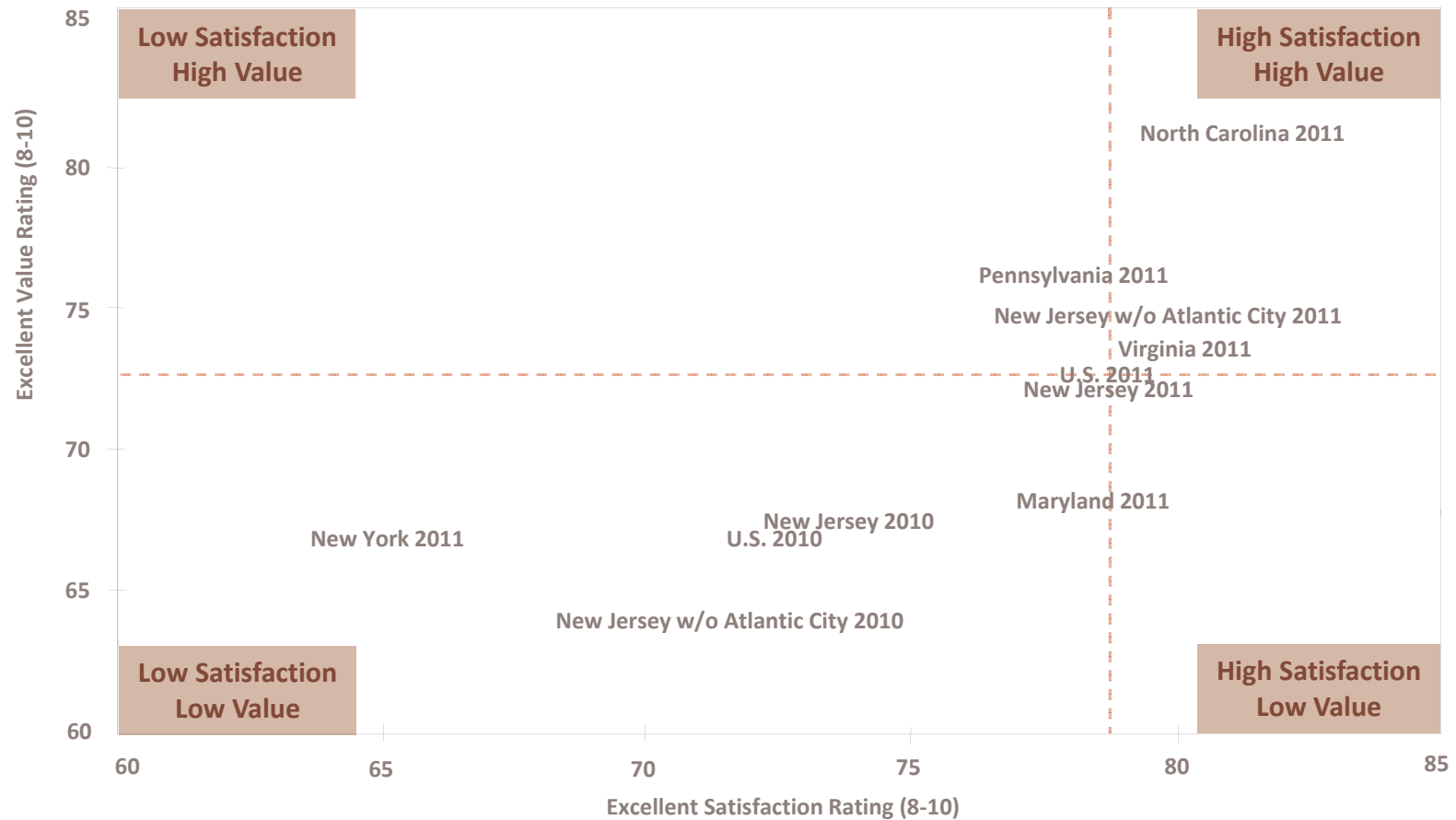


Chart 59 • Segment: 2010/2011 Overnight Leisure Person-Stay (%) • New Jersey N = 1,023 household count

Appendix

Statistical References

Confidence Interval

The confidence interval table indicates how well the data, based on a sample, reflects the entire population of travelers. The smaller the interval, the more relevant the data and the greater confidence we have that the sample number represents the population. Percentage Findings in Report or Data Tables as follows:

Leisure Travel	Sample Size for 2011	At or near 2% or 98%	At or near 5% or 95%	At or near 10% or 90%	At or near 25% or 75%	At or near 50%
U.S.	32,532	0.1%	0.2%	0.2%	0.3%	0.5%
New Jersey	1,112	0.5%	0.9%	1.3%	1.9%	2.5%
NJ w/o Atlantic City	690	0.6%	1.1%	1.6%	2.4%	3.1%
Comp Set	6,547	0.2%	0.4%	0.5%	0.8%	1.0%
New York	2,236	0.3%	0.6%	0.9%	1.3%	1.7%
Pennsylvania	1,722	0.4%	0.7%	1.0%	1.5%	2.0%
Maryland	720	0.6%	1.1%	1.6%	2.3%	3.1%
Virginia	1,074	0.5%	0.9%	1.3%	1.9%	2.5%
North Carolina	1,394	0.4%	0.8%	1.2%	1.7%	2.2%

Example:

If the car travel finding for the U.S. is 79% and the sample size is 32,532, using the chart, we can say that at the 90% level of confidence the proportion ranges between 78.7% and 79.3%.

Significance Testing

The chart below compares two proportions from different samples for statistical significance.

Instructions: Enter the proportion for each sample and sample size in the appropriate cells in the data input section, using the Z Score Table, compare the resulting Z score with the Z score corresponding to your desired confidence level. If the resulting Z score is greater than the table Z score, the difference between the two proportions is statistically significant. If the resulting Z score is lower, there is no significant difference.

Data Input	Sample 1	Sample 2	Resulting Z Score	Z score	Confidence Level
Proportion	65%	79%		(+/-) 1.96	95%
Sample Size (n)	74,085	55,203	-54.86	(+/-) 1.64	90%

Example:

If the car travel finding for U.S. is 65% in previous time period and 79% in current time period, using the chart, we can say that the actual proportion change is statistically significant since the resulting Z score (-54.86) is larger than the table Z score (1.64).

Research Methodology

DKSA's **TRAVEL PERFORMANCE/MonitorSM** is a comprehensive study measuring the travel behavior of US residents. DKSA contacts 50,000 distinct U.S. households monthly and has done so since 1991. DKSA is able to provide current behavior and long term trended analyses on a wide range of travel.

DKSA utilizes a mix mode data collection methodology of commercially available mail panel and Internet panels. The sample is drawn as a national probability sample and returns are balanced to ensure representation of the U.S. population according to the most recent U.S. Census. Key factors used for balancing are: Origin State, Age, Income, Education, Gender and return rates.

All households are surveyed for the incidence of travel each month so DKSA obtains a true measure of travel in the total population. Among those who have traveled in the past three months, details of their trip(s) are recorded for each month. This overlapping, repeating monthly approach boosts the observed number of trips for each travel month and controls for seasonality and telescoping biases. "Travel" is defined as a trip over 50 miles one-way from home or any travel night away from home. Respondents

report travel behavior for each trip and each stay; an approach that enhances reporting for specific travel events, activities and spending.

A wide variety of general travel information is collected including travel to destinations at a city level, hotel stayed in, purpose of trip and activities, expenditures, mode of transportation, trip party composition, length of stay, travel agent and group tour usage, satisfaction and value ratings, and demographics, including origin markets.

Several questions are asked as open-ends to insure that the responses are not influenced by a pre listed set of response categories. Each respondent identifies the actual destination visited with an open-end response. This is particularly significant for obtaining accurate data for smaller cities and counties and representing total travel. This increases time and expense to accurately capture these responses but quality requires it.

Each returned survey is scanned and reviewed for accuracy. Extensive coding lists are updated regularly to ensure that all data is recorded accurately. DKSA also conducts bi-weekly meetings to review survey results and examine methods to maintain and improve quality control.