



D.K. Shifflet & Associates Ltd.

*Excellence in Travel Intelligence*®

# **2012 NEW JERSEY OVERNIGHT LEISURE VISITOR PROFILE**

Editorial

Summary

Charts & Graphs

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## Fiscal Year 2012 Visitor Profile

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

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**February 2013**

This New Jersey **Overnight Leisure Visitor Profile** provides intelligence on U.S. and New Jersey travel trends from Fiscal Year 2012. 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 2012 New Jersey hosted a total...  
81.3 Million visitors spending...  
\$17.3 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/Monitor<sup>SM</sup> Travel Intelligence System<sup>SM</sup>** — the largest travel-tracking system in the U.S. The 2012 New Jersey Overnight Leisure Visitor Profile is based on a sample of 1,125 traveling households. Data are based on a fiscal year comprised of fourth quarter 2011 through third quarter 2012. DKSA finalizes, and makes all quarterly data adjustments, after data collection for the fourth quarter of the year. Therefore fiscal year 2012 data is considered 'partial' meaning that it is subject to year end 2012 adjustments. These adjustments are reflected in the subsequent year's Visitor Profile report.

It should be noted that data in this 2012 report is based on a time frame prior to the occurrence of hurricane Sandy, the impact of the storm will not be reflected here.

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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 conditions of the past few years have created challenges for most states resulting in variable growth in visitor volume and the associated spending in their cities and destinations. At the national level declines in visitor volume and spending slowed in 2010 followed by strong growth in 2011. Although growth continued in 2012, the rate slowed markedly.

This pattern is seen in New Jersey as well. Driven by increased

visitation to the Atlantic City region, New Jersey experienced its second consecutive year of record highs for both visitation and spending. The increase however, was less than half what it was in 2011. While growth in visitation was similar to the U.S., growth in spending was much slower.

The slowed growth for New Jersey resulted in lost market share among its competitors. This is true for the State as a whole as well as when Atlantic City is excluded. The only other competitive state to lose visitor share was North Carolina — Pennsylvania was flat while New York, Maryland and Virginia showed increases in share of visitors.

## Fiscal Year 2012 Highlights:

- Record high visitation in 2012
- Slower, but continued growth in Overnight Leisure Visitor Volume and Spending
- Growth slower than average U.S. destination and competitive set
- Most visitor gains in Atlantic City Region; most spending gains in regions other Atlantic City
- Greater Atlantic City region hosts more Overnight Leisure Visitors than Gateway and Southern Shore regions combined
- New Jersey and North Carolina only states in competitive set losing Overnight Leisure Market Share
- New Jersey and all competitive states Excellent Destination Satisfaction and Value ratings declining
- Compared to its competition, New Jersey visitors have higher incomes, but lower than in past
- Weekend Getaway regains position as primary purpose of visit to New Jersey

## STUDY SPECIFICATIONS

**Travel definition:** Either an overnight trip defined as going someplace, staying overnight and then returning home or as a day trip defined as a place away from home and back in the same day

**Sample Frame:** All U.S. domestic Overnight Leisure travelers during 2012 in New Jersey.

**Timeframe:** Fiscal Year 2012 (Q4 2011 – Q3 2012)



## Executive Summary

The characteristics of overnight leisure visitors to New Jersey may help explain why some of these shifts are occurring. The State largely hosts two types of visitors depending on whether or not Atlantic City is included in the Analysis. Visitors to the Atlantic City region, which hosts slightly less than half the State's visitors, tend to visit for short getaways, stay in hotels or other paid accommodations, have higher household incomes and less likely to have children in their households. Conversely, visitors to the balance of the state are more likely to be on a longer general vacation, stay in non-paid accommodations such as second homes or with friends and relatives and are more likely to have children in their households. 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.

One such change occurring in 2012 is the shift in the share of regional visitation. For the first time in several years the share of visitors to the Greater Atlantic City Region rose, while the share of all other regions excluding the Southern Shore and Skylands regions declined. Thus the characteristics of visitors to Atlantic City have a greater impact on the State as a whole.

Another change is in income. Although New Jersey traveler incomes are higher than average, the share of those earning over \$75,000 was relatively flat for the State as a whole, but dropped substantially when Atlantic City is excluded. Thus, while the average income of travelers to the entire State rose slightly, the average income of travelers to the non-Atlantic City regions fell to levels below 2008. This

means that visitors to Atlantic City in 2012 had considerably higher incomes than those visiting the balance of the state and higher incomes than those visiting in 2011.

The activities people engage in while visiting New Jersey also differ when looking at the State as a whole and looking at the State without Atlantic City. In the former analysis, the top activities are Beach/Waterfront, Culinary/Dining Experience and Gambling, which for the second consecutive year made the top three. If Atlantic City visitors are excluded from the analysis, gambling ranks only 10<sup>th</sup> and is replaced by Visiting Friends and Relatives.

While Excellent destination satisfaction and value ratings remain high (8.2/10 and 8.0/10 respectively), they have declined somewhat over 2011 — value more so than satisfaction. For both dimensions, the State is rated very similarly regardless of whether or not Atlantic City is included in the analysis. One of the reasons perceived satisfaction and value may decline is increased prices — when prices go up people expect better quality — if they are paying more, they expect more. Another obvious reason maybe the quality of the product has actually declined while cost has not. Since the timeframe for this analysis is prior to hurricane Sandy, it is not a factor for 2012.

In summary, while New Jersey continued to see growth in visitation and spending it also saw a shift in the types of visitors to the State as well as the destinations visited in 2012, resulting in shifts to key traveler characteristics. These shifts may warrant a look at whether or not key markets are still being targeted with the appropriate message.

# Visitor Volume and Spending

In Fiscal Year 2012 New Jersey hosted just over 81 million visitors, spending approximately 17.3 billion dollars while visiting the State — an all time high for both visitors and spending.

Although slowing in 2012, the State continued to experience growth in both visitor volume and associated spending. While New Jersey's visitation grew at a slightly greater rate than the average destination, the spending growth was about half that of the average destination.

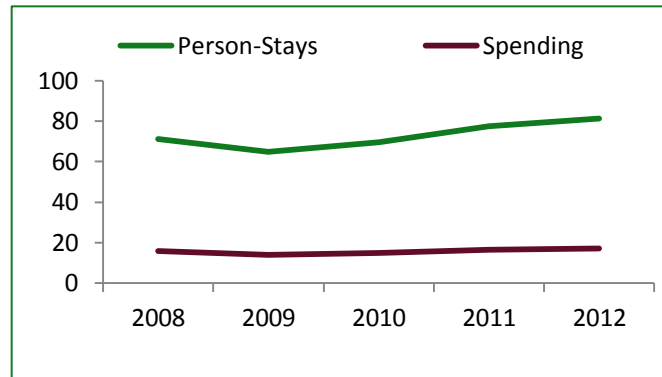
Although growth in total leisure visitation was slightly greater than the U.S., overnight leisure growth was slightly less than the average U.S. destination, indicating that for New Jersey, the less valuable day visitation grew at a faster rate than the rest of the country.

This is further evidenced by the 2012 spending, where overall, the growth in New Jersey visitor spending continues to trail behind the U.S. average. In fact, the gap has been widening over the past few years. Indicating that although New Jersey is experiencing growth in spending it is much slower than the rest of the country.

In 2012, the State experienced a much slower rate of growth in overnight leisure spending than the double digit increase experienced in 2011. This growth rate (6.4%) is also less than the average U.S. destination or the competitive set which enjoyed overnight leisure spending increases of almost 10% in 2012.

## Total

PERSON-STAYS (millions) / DOLLARS (billions)



## Overnight Leisure

PERSON-STAYS (millions) / DOLLARS (billions)



81.3 Million Visitors — ↑ 4.8%

\$17.3 Billion Dollars — ↑ 4.9%

## 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 2012 quarterly adjustments

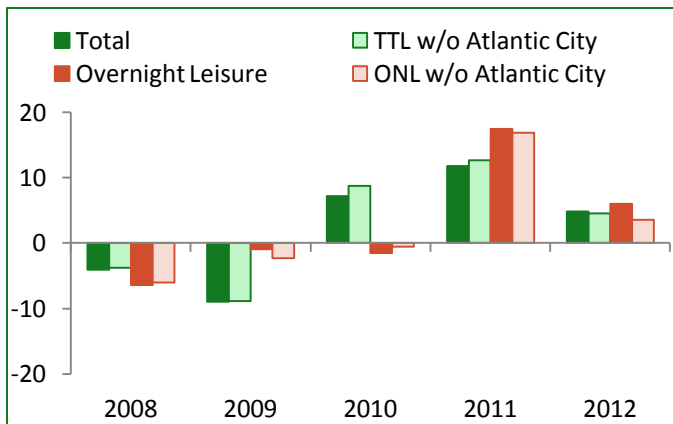
# Visitor Volume and Spending

The lag for New Jersey may be due to a couple of factors. First, nationally, spending is growing at a greater rate than visitation for both business and leisure. In fact the increase in leisure spending is almost 3 times the increase in visitation, indicating that in general travelers are spending more. This is not the case for New Jersey, where changes in business and leisure spending are very similar to the changes in visitation. There may be more people coming, but all visitors are spending at the same rate they have in the past.

Another factor has been 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

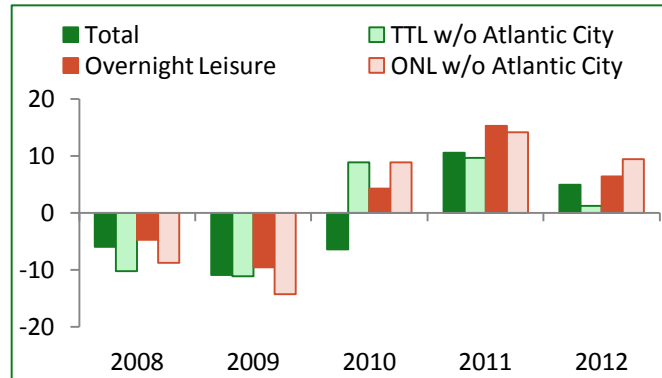
## Visitor Volume

PERSON-STAYS (% change)



## Visitor Spending

SPENDING (% change)



State when Atlantic City is excluded from the analysis. Historically changes in overnight 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 have continued since. Those visiting other parts of the State represent about two-thirds of all Person-Stays to New Jersey, thus their impact is significant.

Overnight Leisure Visitors  
Still increasing — ↑ 6.0%

Overnight Leisure Spending  
Spending more — ↑ 6.4%



## Visitor Volume and Spending

In 2012 New Jersey's total visitation grew at a similar pace regardless of whether or not Atlantic City is included in the analysis. This is not true when only overnight leisure visitation is considered. In this case growth was less when Atlantic City was excluded indicating that the recovery in visitors to Atlantic City experienced in 2011 is continuing.

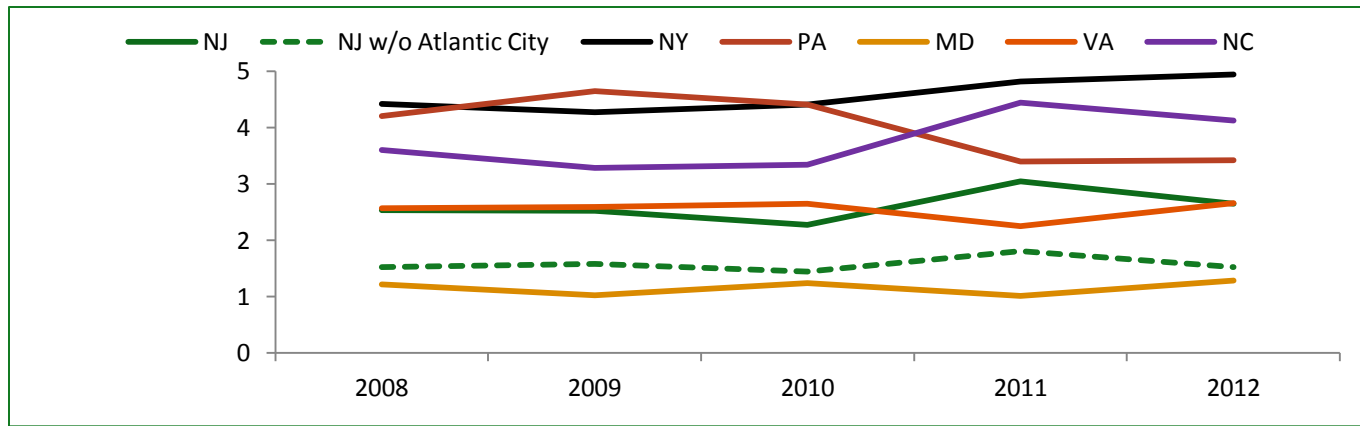
Spending, however is a different story. Growth in spending for the State excluding Atlantic City is much slower than when Atlantic city is included, except for overnight and overnight leisure. In these cases the increase in spending is much more pronounced when

Atlantic City is excluded indicating that the increases in spending are occurring in areas other than Atlantic City. Or that the increases in Atlantic City visitation are primarily day trips.

After an increase in 2011, New Jersey's overnight leisure market share is trending back down. The decline is not as severe for the State excluding Atlantic City indicating that the loss in share is either due to Atlantic City, with its increased number of day trips, or to the steady increase of New York. Maryland and Virginia are also gaining back share after a decline in 2011.

### Market Share

#### OVERNIGHT LEISURE PERSON-STAYS



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

## Who are New Jersey's Overnight Leisure visitors?

Traditionally, New Jersey's Overnight Leisure visitors have been slightly older than those visiting the average U.S. destination or the competitive set. While the State still hosts a larger share of older generations, its share of Millennials has increased, thus bringing the average age in line with those visiting the average U.S. destination as well as those visiting the competitive set.

New Jersey visitors continue to have higher average incomes than visitors to either the average U.S. destination or to the competitive set. Average incomes of New Jersey travelers increased in 2012, but are still lower than they were in 2009 and 2010. This could be due, in part to the larger share younger visitors.

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

New Jersey is more likely to host travelers in the Boomer generation than is the State excluding Atlantic City, the average U.S. destination or its competitive set. This is offset, however, by an increased share of Millennials for New Jersey whether Atlantic City is considered in the analysis or not. The result is a reduced average age of New Jersey visitors.

## How do New Jersey's Overnight Leisure visitors compare?

	New Jersey	New Jersey w/o Atlantic City	Average U.S. Destination	Competitive Set (NY/PA/MD/VA/NC)
Average Age (yrs.)	46	46	46	46
Employed	63%	65%	65%	65%
Retired	18%	16%	19%	17%
Average Income (000)	\$99.2	\$91.5	\$85.5	\$89.3
Children in HH	37%	42%	43%	41%
Generations:				
Millennial	24%	26%	22%	22%
GenX	24%	27%	33%	31%
Boomer	40%	35%	35%	35%
Silent/GI	11%	12%	11%	11%

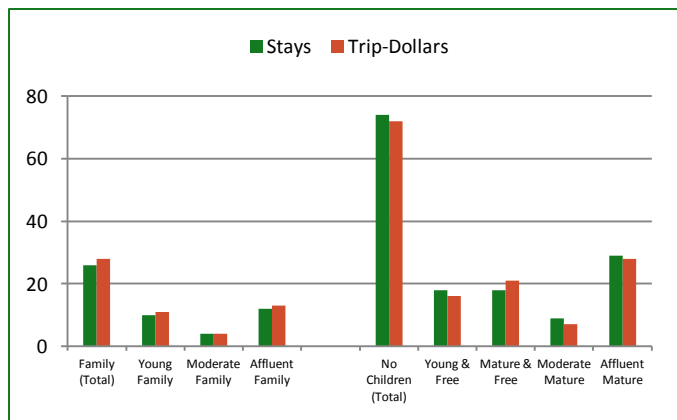
**New Jersey Visitors:**  
Employed  
Higher Income  
Fewer Kids in Household

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 where the share of Trip Dollars is less than the share of Stays these Lifestages are the least profitable for the State. Driven by the Young Family and Affluent Family Lifestages, the combined family Lifestages, for the entire State are the most profitable. When Atlantic City is excluded Lifestages are much more even in terms of profitability.

## New Jersey

OVERNIGHT LEISURE STAYS (2010-2012)

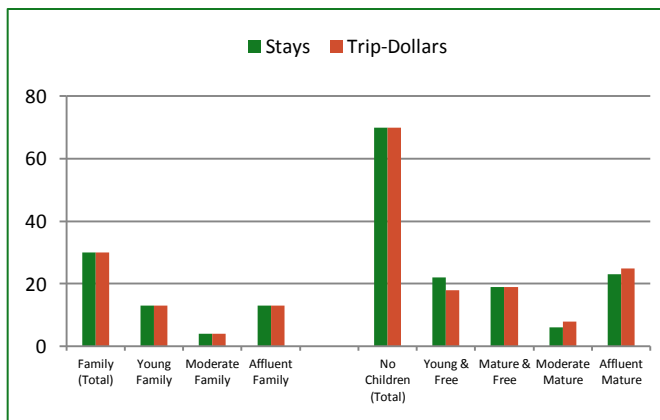


## DKSA Lifestage Definitions

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 (2010-2012)



**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

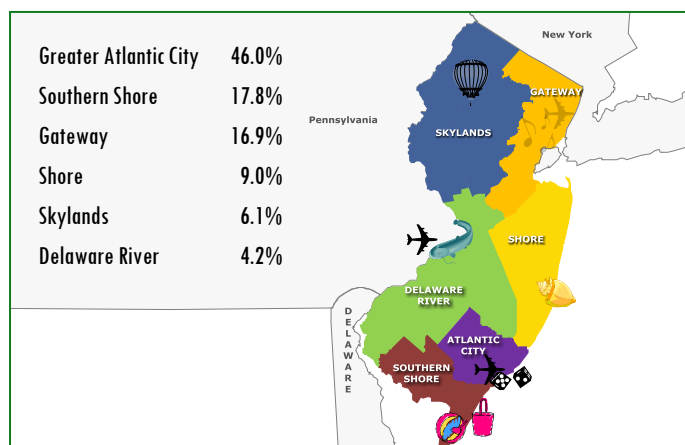
## Where do New Jersey's visitors come from?

More than 4 out of 5 New Jersey visitors come from 7 states with about one quarter coming from New Jersey itself and an additional 44% 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 250 miles — almost 200 miles *less* than the to the average U.S. destination and about 100 miles *less* than or to New Jersey's competitive set. Like the U.S., travel distances to New Jersey in 2012 took a steep dive after several years of increases.

## New Jersey Destination Regions

OVERNIGHT LEISURE SHARE OF PERSON-STAYS



## New Jersey Origin States

OVERNIGHT LEISURE SHARE OF PERSON-STAYS

New Jersey	25.5%
Pennsylvania	24.1%
New York	19.7%
Maryland	6.6%
Florida	3.7%
Connecticut	3.1%
Virginia	2.0%
Other	15.3%

## Where do New Jersey's visitors go?

The Greater Atlantic City Region continues to receive the largest share of New Jersey's Overnight Leisure visitors. After several years of declining share from a high of 55% in 2006, the region experienced some upward movement in share in 2012.

The importance of Atlantic City to this region and to the State can not be overlooked. When Atlantic City is excluded from the analysis, the share of travel for this region drops to less than 2%.

The Gateway region, which had the second highest share of New Jersey travel in 2011 dropped to number three in 2012 and the Southern Shore region regained its number two position.

Over two-thirds of New Jersey visitors come from tri-state area

## Why do travelers visit New Jersey?

After a year of very similar travel for getaway weekends and vacations, getaway weekends have again become the predominant type of trip for New Jersey's overnight leisure visitors in 2012. The reasons for visiting New Jersey, however, vary substantially depending on whether or not Atlantic City is included in the analysis.

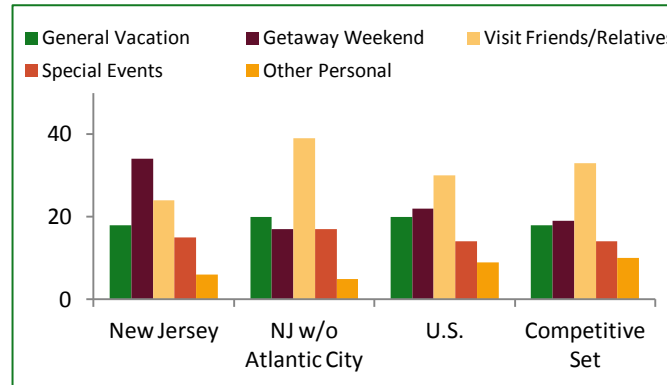
For the State as a whole, the share of getaway weekends was almost double that of general vacations (34% and 18% respectively). In fact, in 2012 travelers were more likely to come to the State to visit friends and relatives (24%) than to take a general vacation.

When Atlantic City is excluded, getaway weekends drop to less than 20% and visiting Friends and relatives jumps to almost 40%. 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. It is interesting to note that when Atlantic City is excluded the pattern is very similar to the average U.S. destination and to the competitive set.

The combination of increased travel to visit friends and relatives and decreased getaway weekend travel is reflected in the lower average spending for New Jersey without Atlantic City. Again, this pattern is similar to the average U.S. destination and the competitive set and again demonstrates the value of the Atlantic City area.

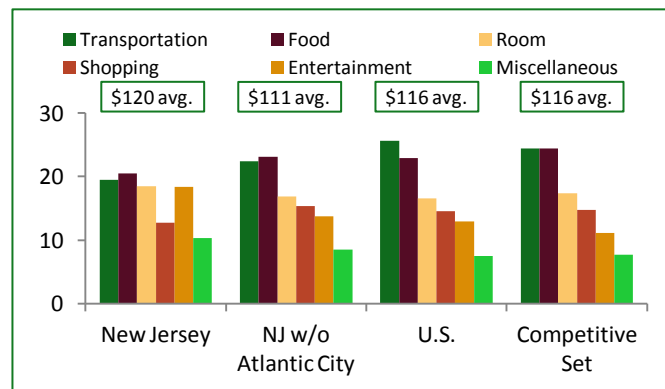
## Purpose of Travel

### OVERNIGHT LEISURE PERSON-STAYS



## Per-Person-Per-Day Spending

### OVERNIGHT LEISURE



Atlantic City area drives  
Weekend Getaways  
And Spending

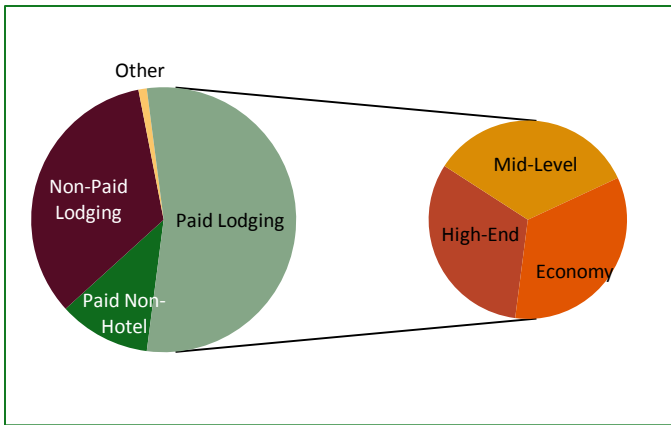
## Where do New Jersey visitors stay?

When Atlantic City is excluded from the analysis the average per-person-per-day spending drops by \$9, 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 55% of visitors to the entire State stay in paid accommodations

### New Jersey

OVERNIGHT LEISURE PERSON-STAYS



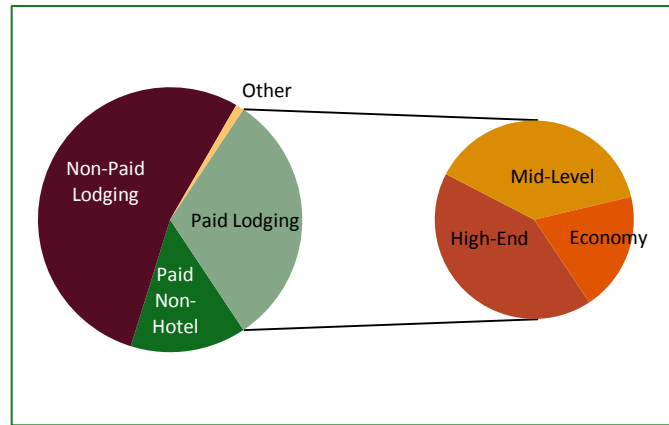
only 32% who visit the balance of the State do so. New Jersey as a whole hosts more visitors staying in paid lodging than the average U.S. destination or their competitive set.

Among those who stay in paid accommodations and visit non-Atlantic City destinations, 79% stay in high or mid-level accommodations. When Atlantic City is included, this percentage drops to 64%.

Overall, overnight leisure visitors to New Jersey stay approximately 2.6 nights, which is slightly below both the U.S. average and the competitive set. New Jersey without Atlantic City hosts longer stays at 3.0 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 more mid-level



## What do New Jersey visitors do?

Several activities, including visiting friends and relatives were either added to, or refined in, the list of potential activities from which respondents could choose, thus there may be some ranking differences compared to previous years.

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. Beach/Waterfront
2. Culinary/Dining Experience<sup>1</sup>
3. Gambling
4. Shopping
5. Visiting Friends and Relatives<sup>1</sup>

When considering the State without Atlantic City, not only does the order change, but gambling completely falls out of the top five and is replaced equally by the much less lucrative activities of touring/sightseeing and concerts/theatre/dance. In fact, gambling ranks only 10<sup>th</sup> for this portion of the State.

1. Visit Friends and Relatives<sup>1</sup>
2. Beach/Waterfront
3. Culinary/Dining Experience<sup>1</sup>
4. Shopping
5. Touring/Sightseeing  
Concerts/Theatre/Dance

Until 2008, gambling had been the most popular activity in New Jersey. Although the percentage of visitors coming to gamble is still below the 2006 high of 40%, 2012 marks the second year of increases bringing the proportion of visitors participating in this activity to 37%.

In a recent generational analysis<sup>2</sup> 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. The most profitable travel parties for the state are those engaging in the activities of shopping, culinary/dining, beach/waterfront and gambling.

Beach/Waterfront ↑  
Gambling ↑  
Other activities ↑↓

<sup>1</sup>New activity listing

<sup>2</sup>How Generations Travel – presented at 2010 TTRA in San Antonio, Texas

## How do New Jersey visitors rate the State?

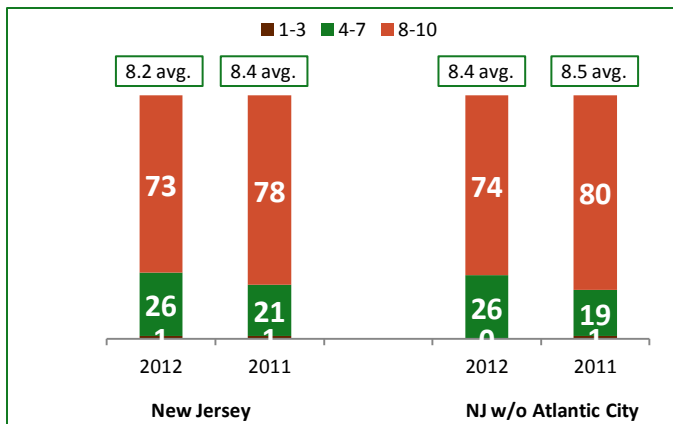
Respondents are asked to rate their overall satisfaction with the destinations they visit as well as the overall value for the money the destination provides. Ratings are on a 10-point scale, where 1 is low or 'poor' and 10 is high or 'excellent'.

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 2012 all competitive states achieved average ratings of between 8.2 and 8.6, similar to the average U.S. destination.

Although Excellent satisfaction ratings for New Jersey fell in 2012, poor ratings were almost non-existent.

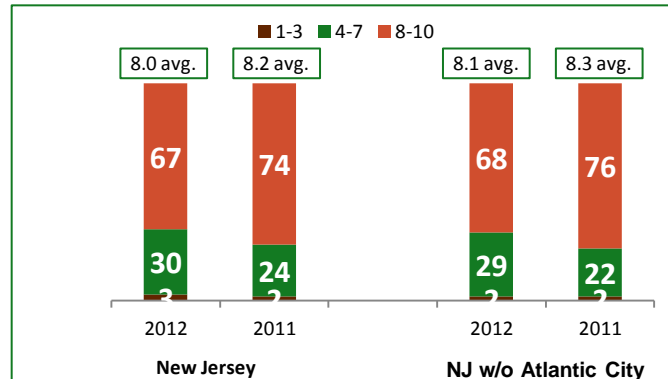
## Overall Satisfaction

### OVERNIGHT LEISURE PERSON-STAYS



## Value for the Money

### OVERNIGHT LEISURE PERSON-STAYS



Although the average value for the money rating dropped only slightly, in 2012, the drop in Excellent ratings for New Jersey as a whole and when Atlantic City is not considered were substantial. The competitive states, on the other hand remained fairly consistent between 2011 and 2012.

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.



# Excellent Destination Satisfaction vs. Value Ratings

DESTINATION RATINGS

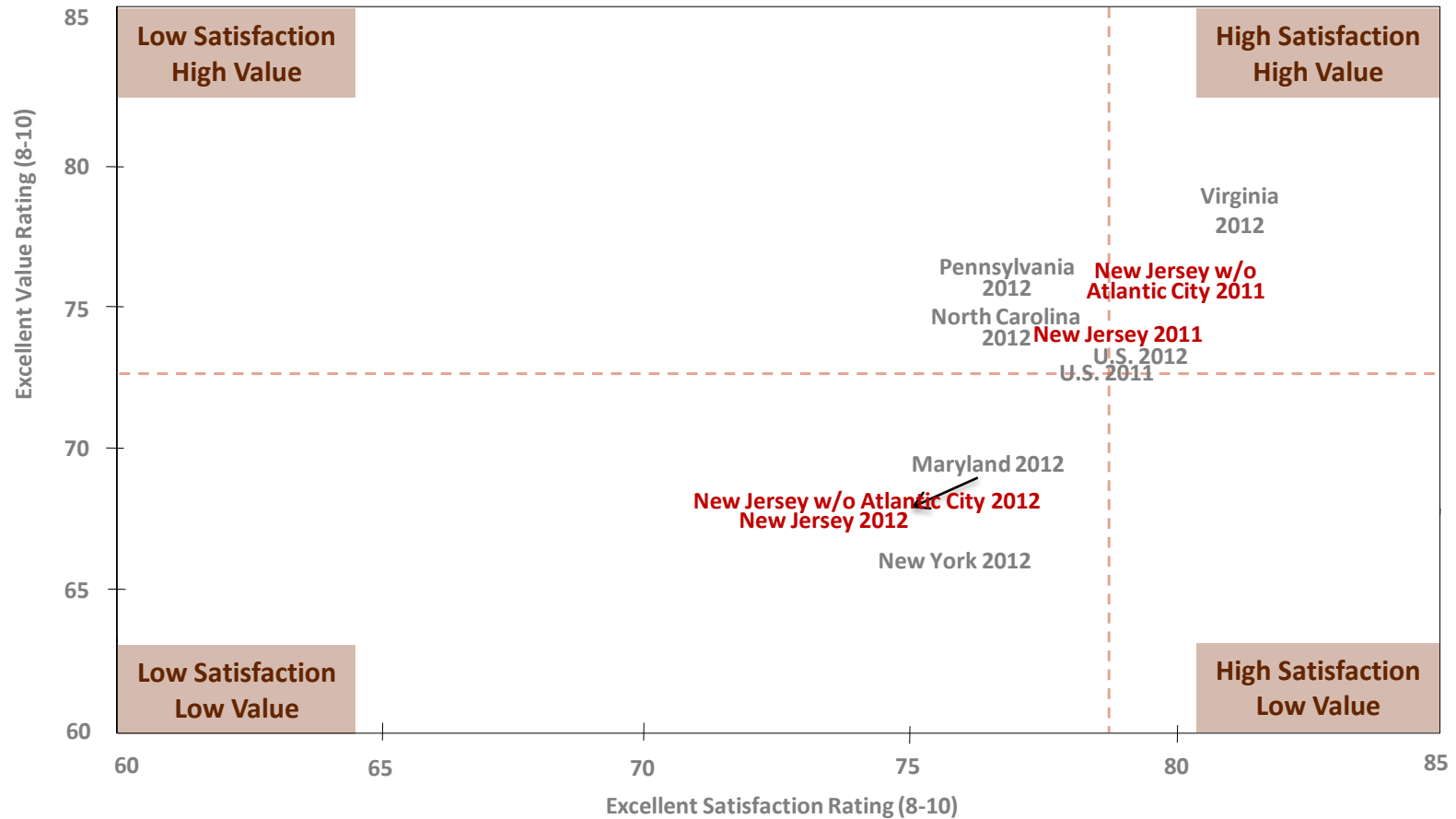
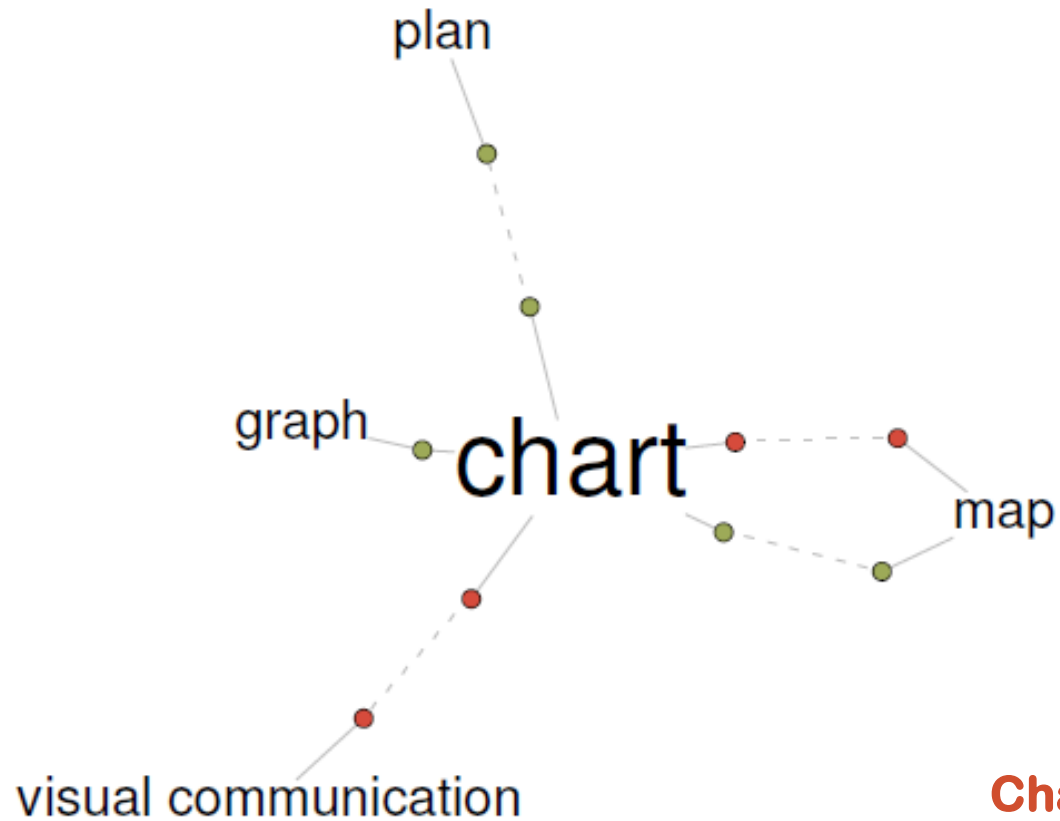


Chart 61 • Segment: 2011/2012 Overnight Leisure Person-Stays (%) • New Jersey N = 1,125 household count



## Charts and Graphs

New Jersey Year-End 2012 Visitor Profile

# U.S. Travel Segments

VOLUME

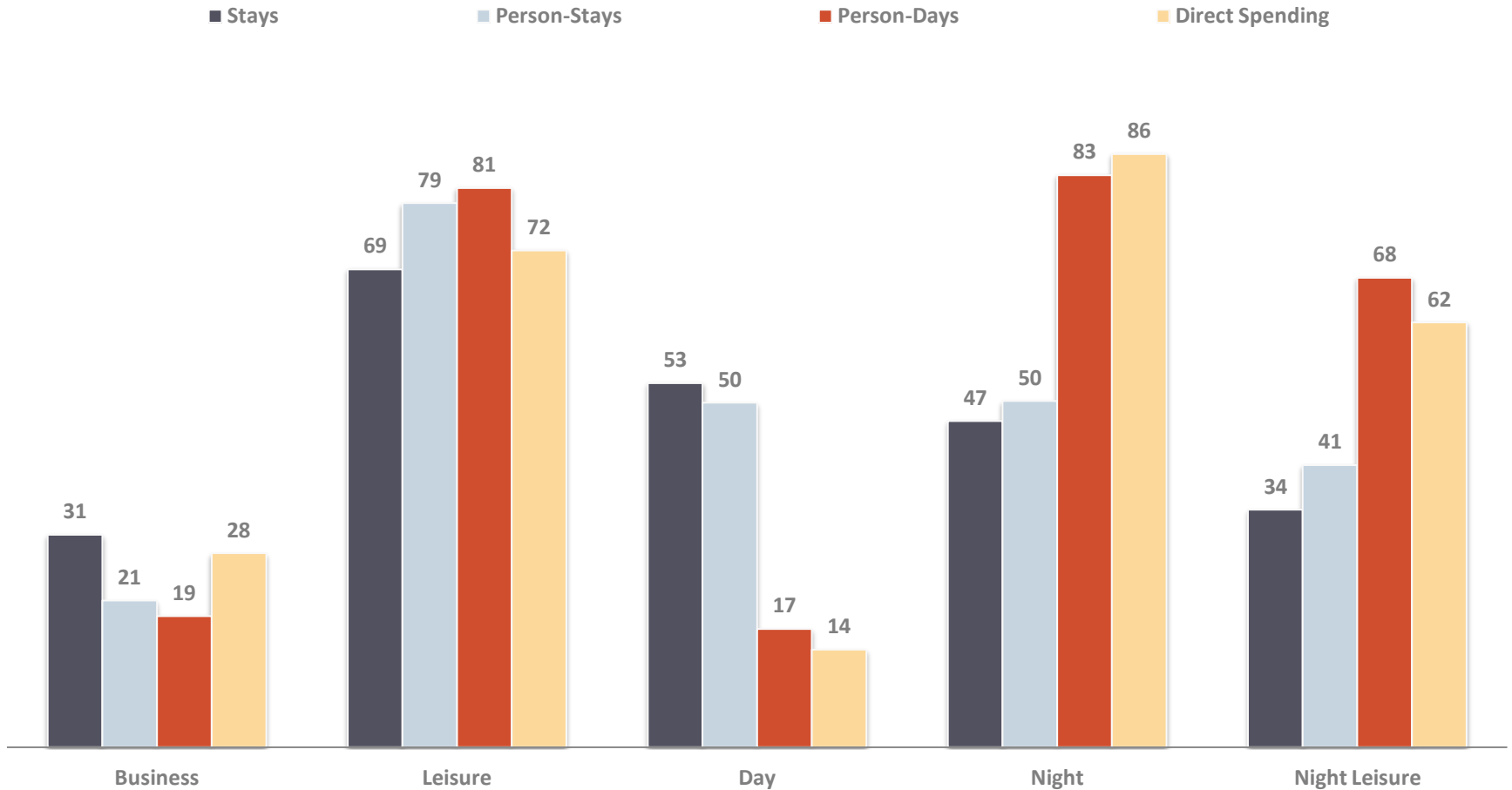


Chart 1 • Segment: 2012 Total Volume (%)

# U.S. Travel Volume Change by Division

VOLUME

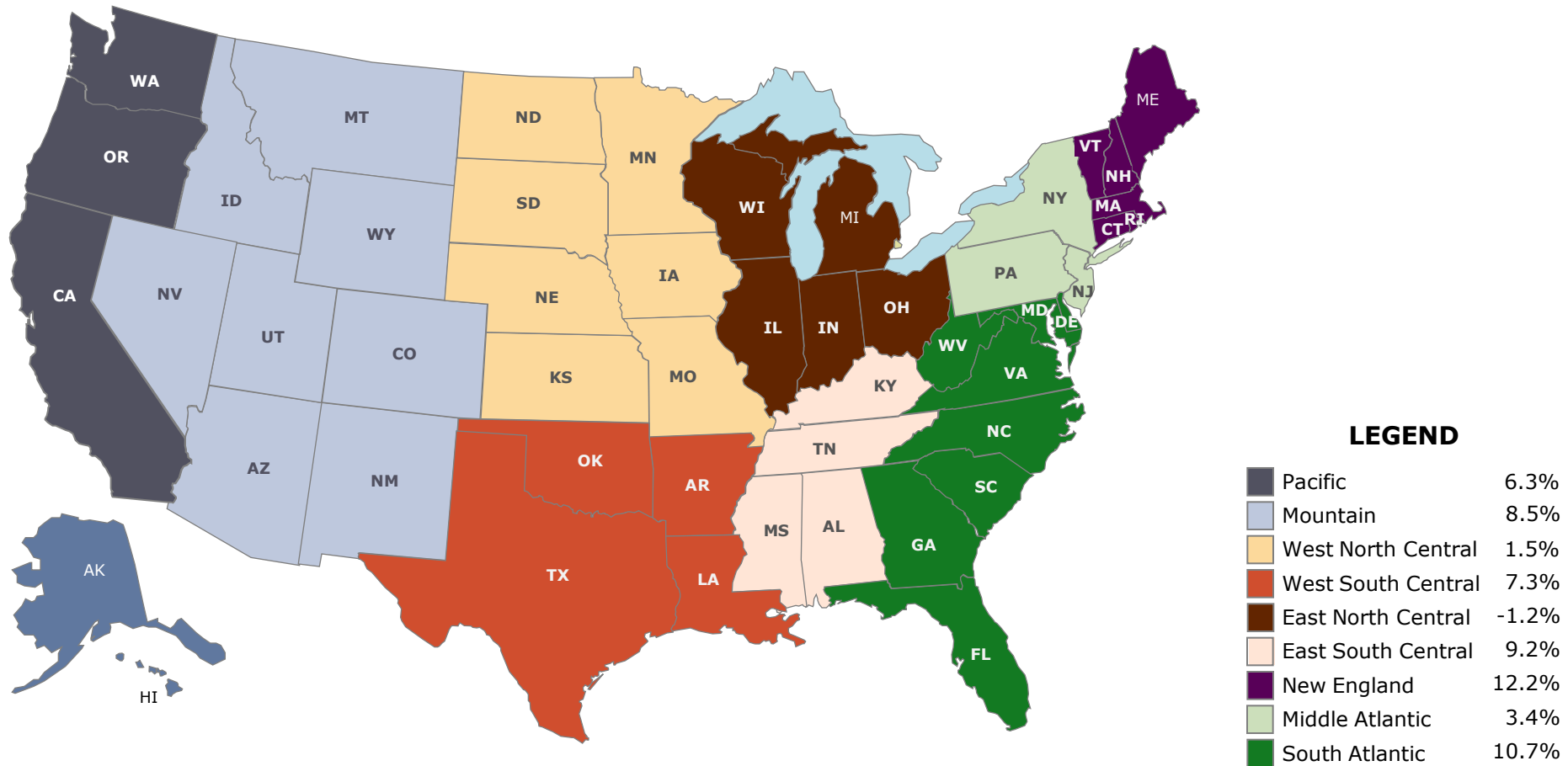


Chart 2 • Segment: 2011/2012 Overnight Leisure Person-Stays (%)



# New Jersey Person-Stays Volume

VOLUME

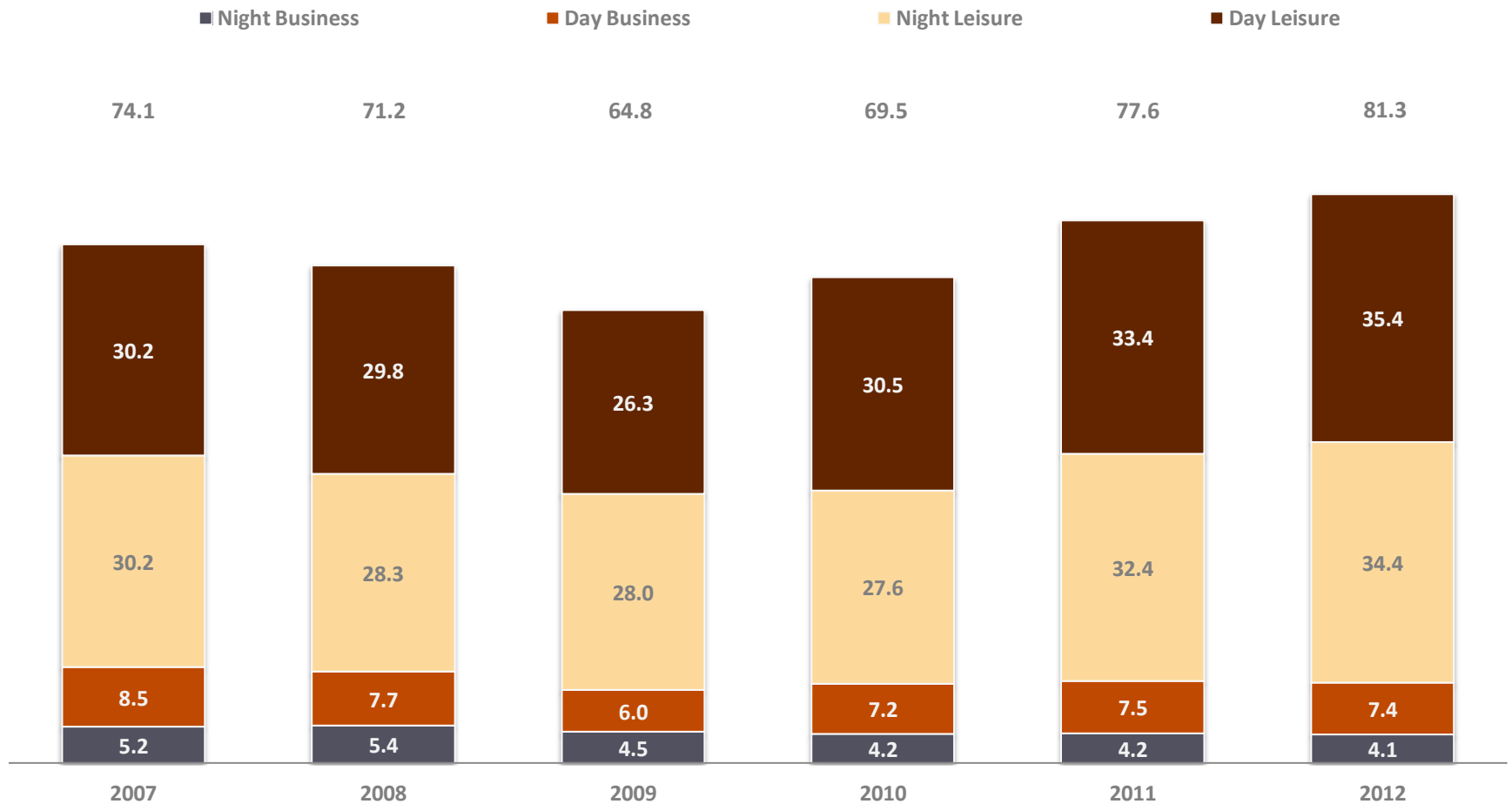


Chart 3 • in Millions

## New Jersey Person-Stays Volume

VOLUME

	New Jersey					U.S.
	08/07	09/08	10/09	11/10	12/11	12/11
<b>Total</b>	-4.0%	-9.0%	7.2%	11.8%	4.8%	4.2%
<b>Business</b>	-4.9%	-19.7%	8.4%	3.4%	-2.1%	-0.2%
<b>Leisure</b>	-3.8%	-6.6%	7.0%	13.4%	6.0%	5.5%
<b>Day</b>	-3.1%	-14.0%	16.7%	8.7%	4.7%	3.5%
<b>Night</b>	-5.0%	-3.4%	-2.1%	15.4%	5.0%	4.9%
<b>Day Business</b>	-9.8%	-21.8%	19.1%	4.6%	-1.4%	0.3%
<b>Day Leisure</b>	-1.2%	-11.9%	16.1%	9.7%	6.0%	4.6%
<b>Night Business</b>	3.1%	-16.7%	-6.1%	1.3%	-3.2%	-0.9%
<b>Night Leisure</b>	-6.4%	-0.9%	-1.5%	17.5%	6.0%	6.3%

Chart 4 • % change

# New Jersey Direct Spending Volume

**DIRECT SPENDING**

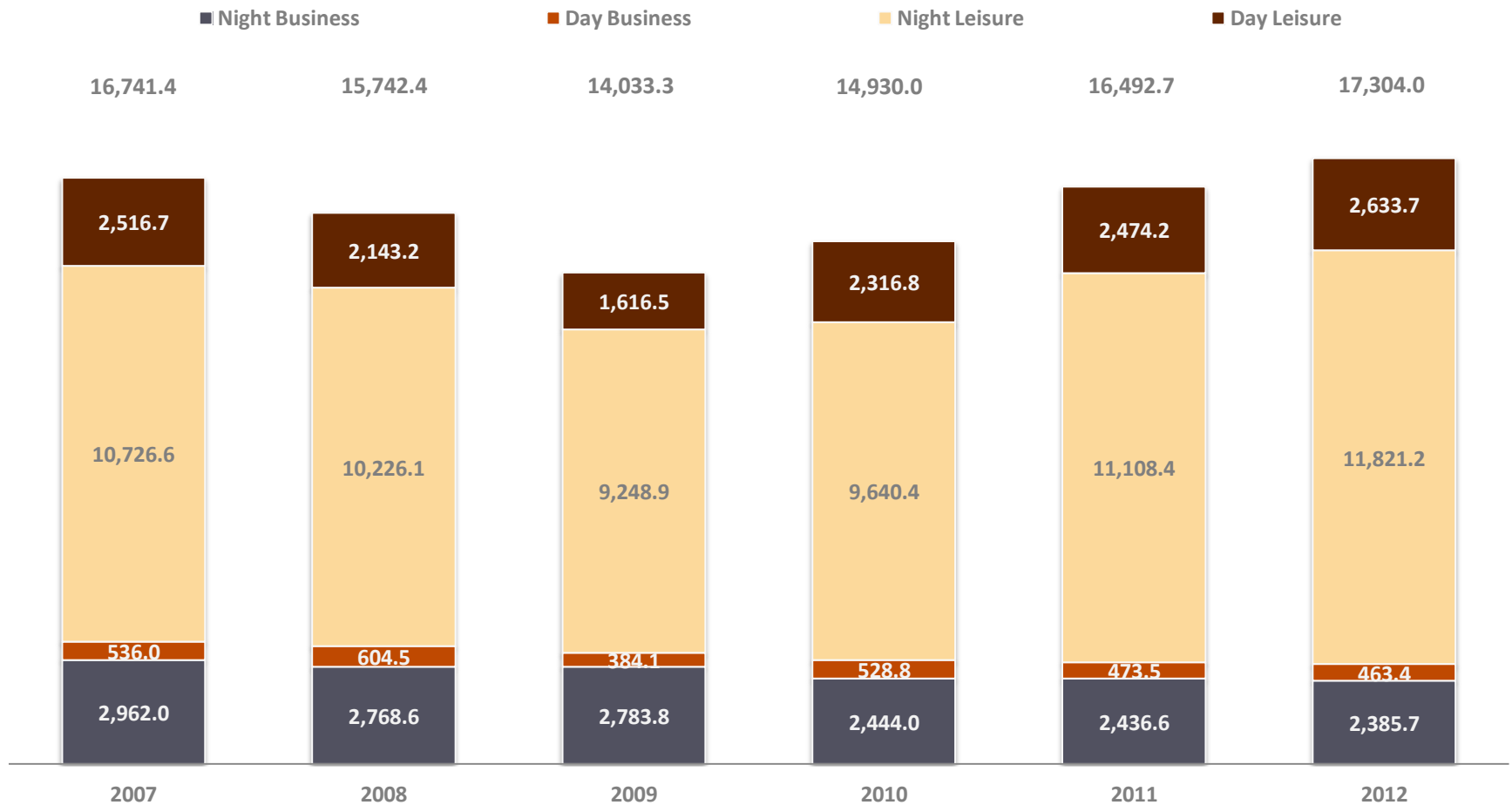


Chart 5 • \$ Millions

# New Jersey Direct Spending Volume

**DIRECT SPENDING**

	New Jersey					U.S.
	08/07	09/08	10/09	11/10	12/11	12/11
<b>Total</b>	-6.0%	-10.9%	6.4%	10.5%	4.9%	12.3%
<b>Business</b>	-3.6%	-6.2%	-6.1%	-2.1%	-2.1%	3.5%
<b>Leisure</b>	-6.6%	-12.2%	10.0%	13.6%	6.4%	16.1%
<b>Day</b>	-10.0%	-27.3%	42.5%	3.6%	5.1%	9.6%
<b>Night</b>	-5.1%	-7.4%	0.4%	12.1%	4.9%	12.8%
<b>Day Business</b>	12.8%	-36.5%	37.7%	-10.5%	-2.1%	6.3%
<b>Day Leisure</b>	-14.8%	-24.6%	43.3%	6.8%	6.4%	10.9%
<b>Night Business</b>	-6.5%	0.5%	-12.2%	-0.3%	-2.1%	3.1%
<b>Night Leisure</b>	-4.7%	-9.6%	4.2%	15.2%	6.4%	17.1%

Chart 6 • % change

# New Jersey Travel Segments

MARKET SHARE

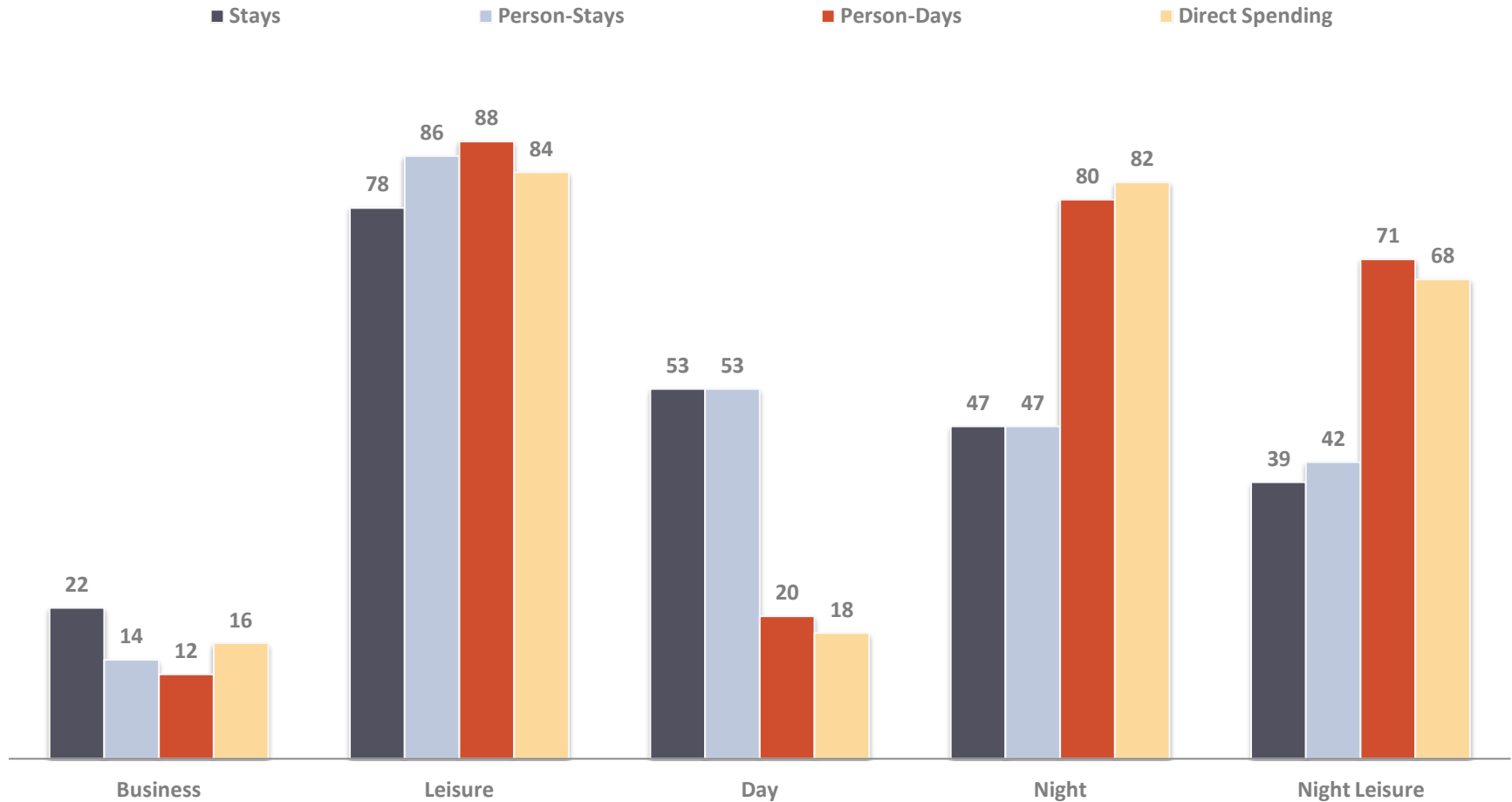


Chart 7 • Segment: 2012 Total Volume (%)

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

MARKET SHARE

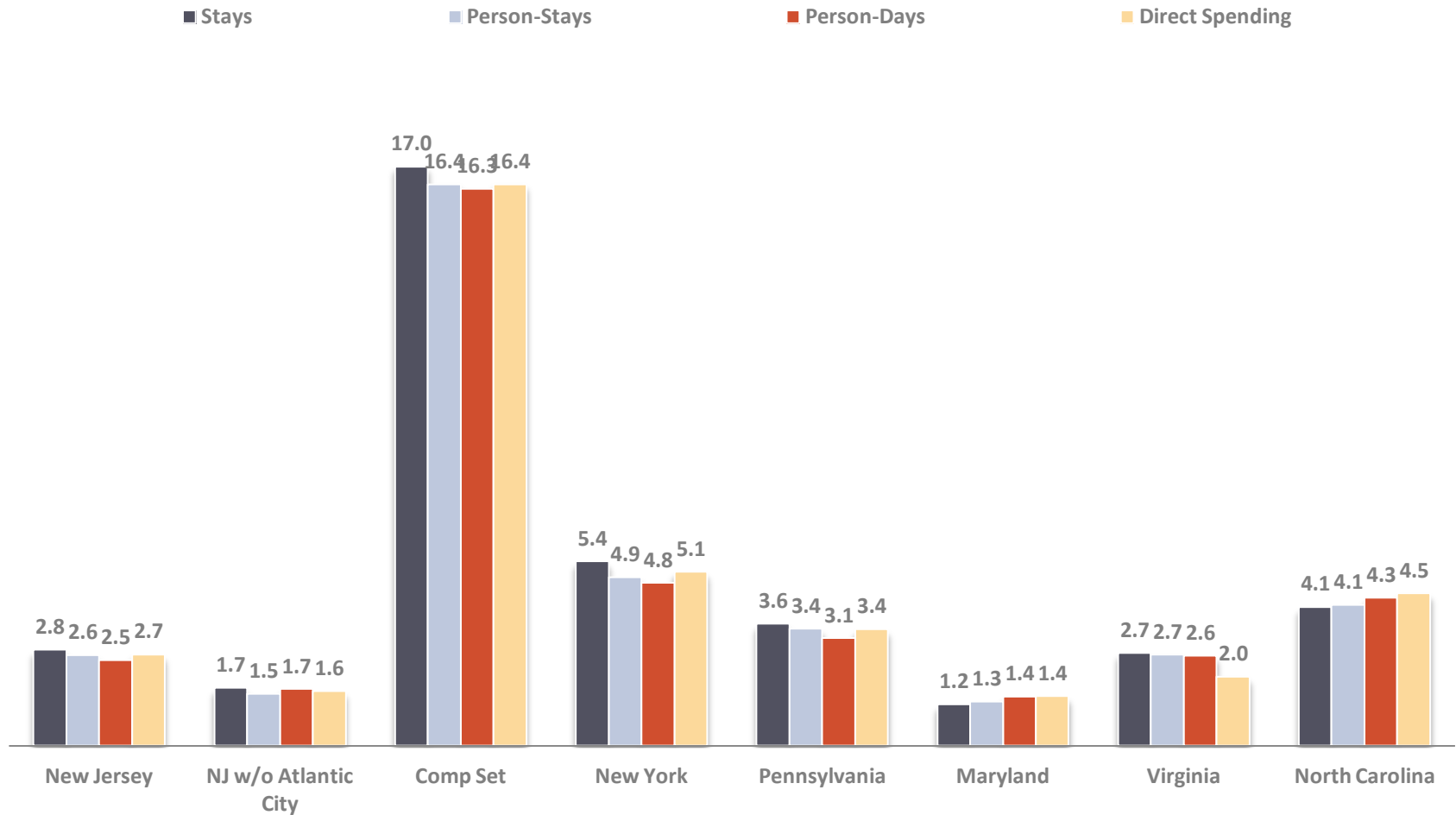


Chart 8 • Segment: 2012 Overnight Leisure (%) • New Jersey N = 1,125 household count



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

DEMOGRAPHICS

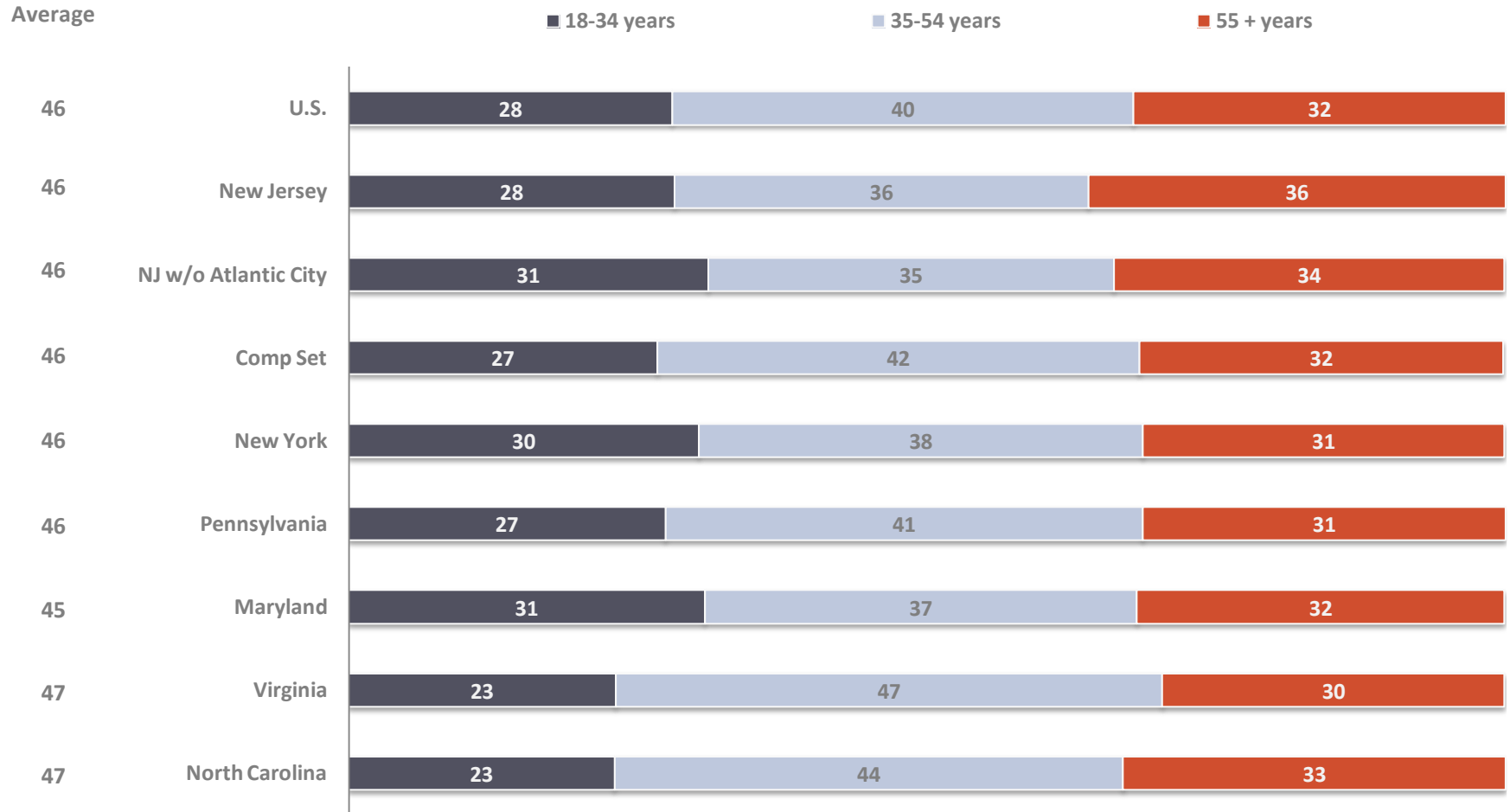


Chart 9 • Segment: 2012 Overnight Leisure Person-Stays (%) • New Jersey N = 1,125 household count

## New Jersey Avg. Party per Trip Spending by Age

DEMOGRAPHICS

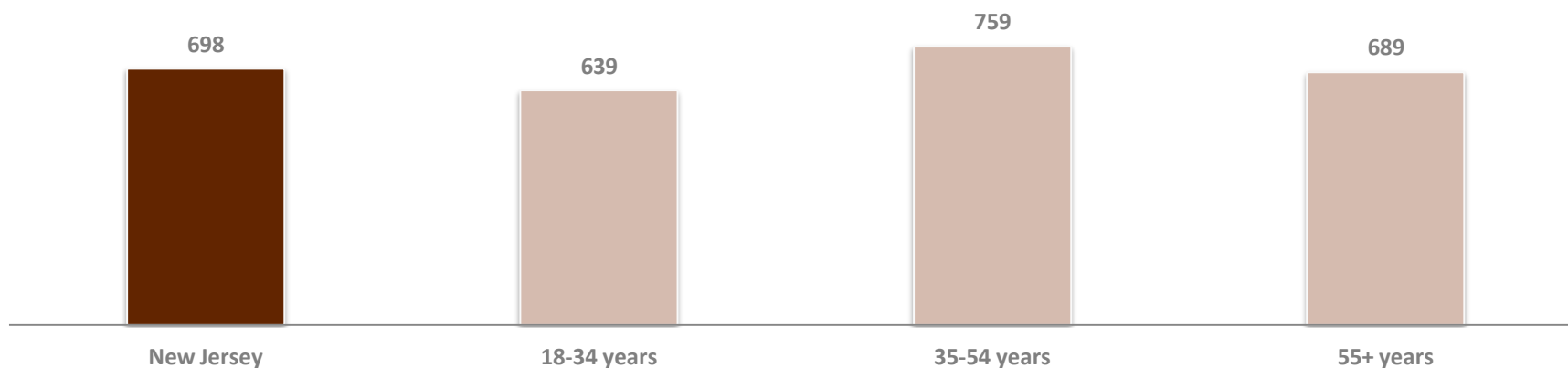


Chart 10 • Segment: 2010-2012 Overnight Leisure Stays (\$) • New Jersey N = 3,682 household count

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

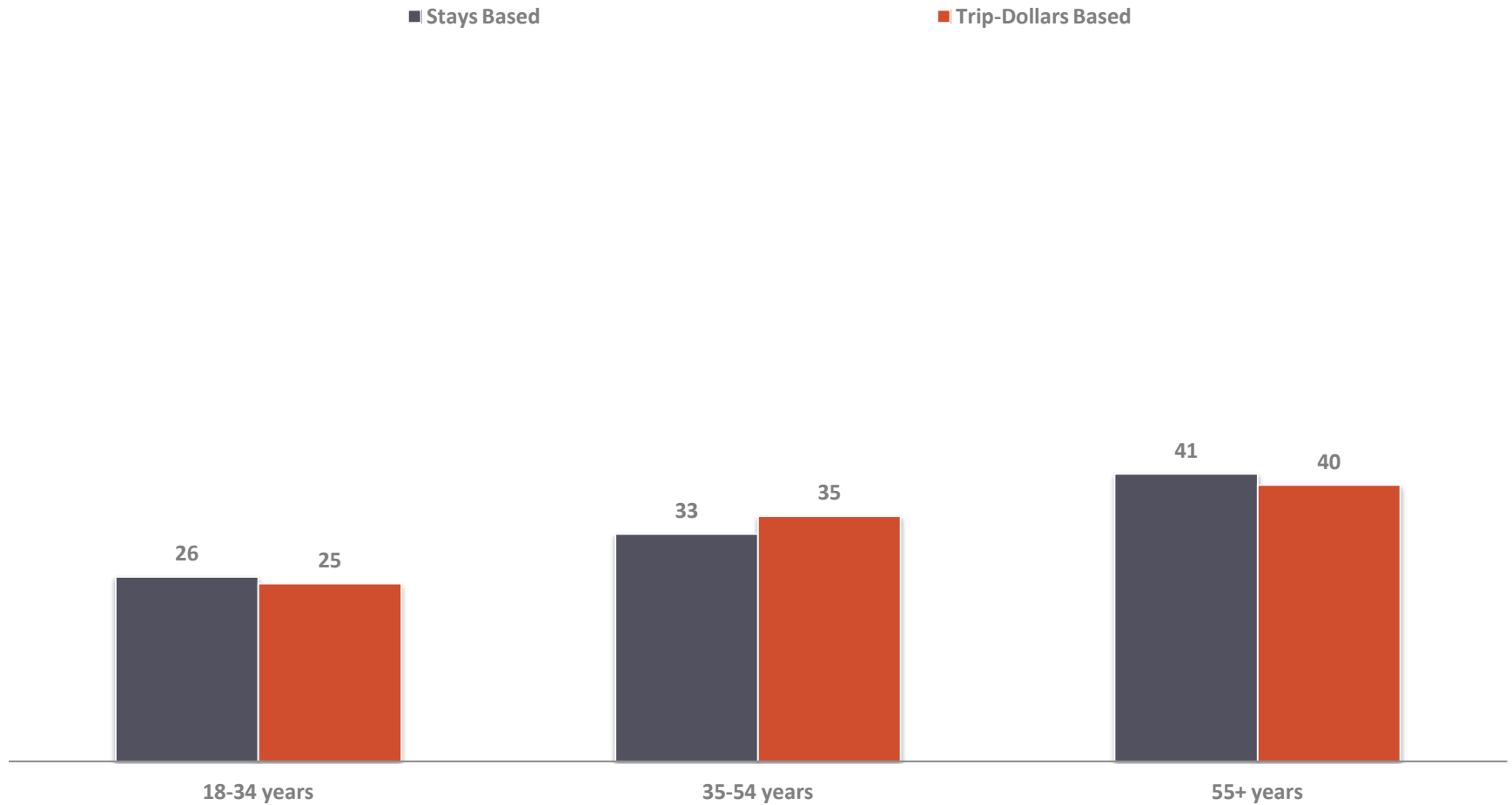


Chart 11 • Segment: 2010-2012 Overnight Leisure (%) • New Jersey N = 4,003 household count

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

DEMOGRAPHICS

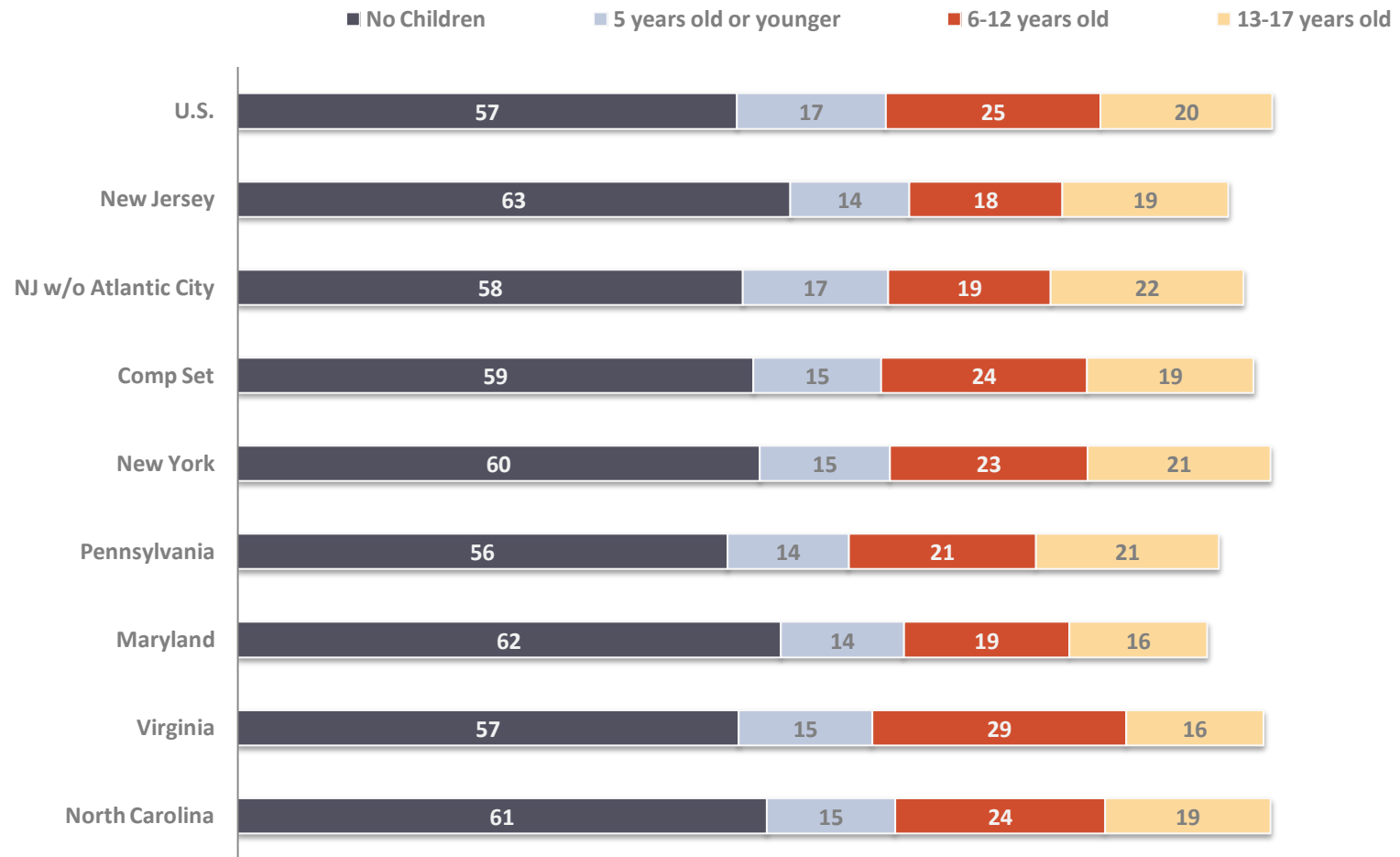


Chart 12 • Segment: 2012 Overnight Leisure Person-Stays (%) • New Jersey N = 1,125 household count

GLOSSARY

Sum exceeds 100% due to multiple-children households.

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

DEMOGRAPHICS

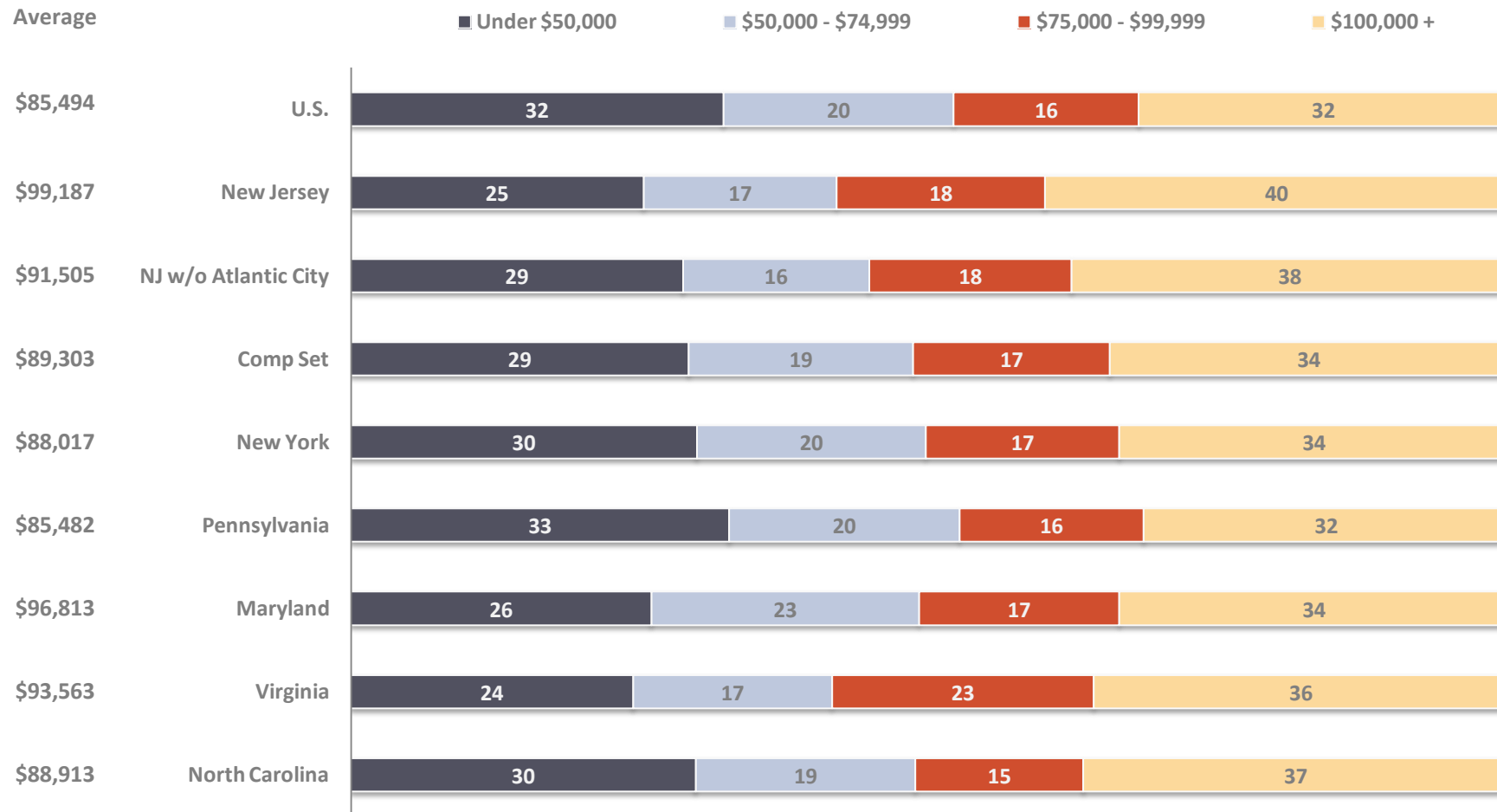


Chart 13 • Segment: 2012 Overnight Leisure Person-Stays (%) • New Jersey N = 1,125 household count

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

DEMOGRAPHICS

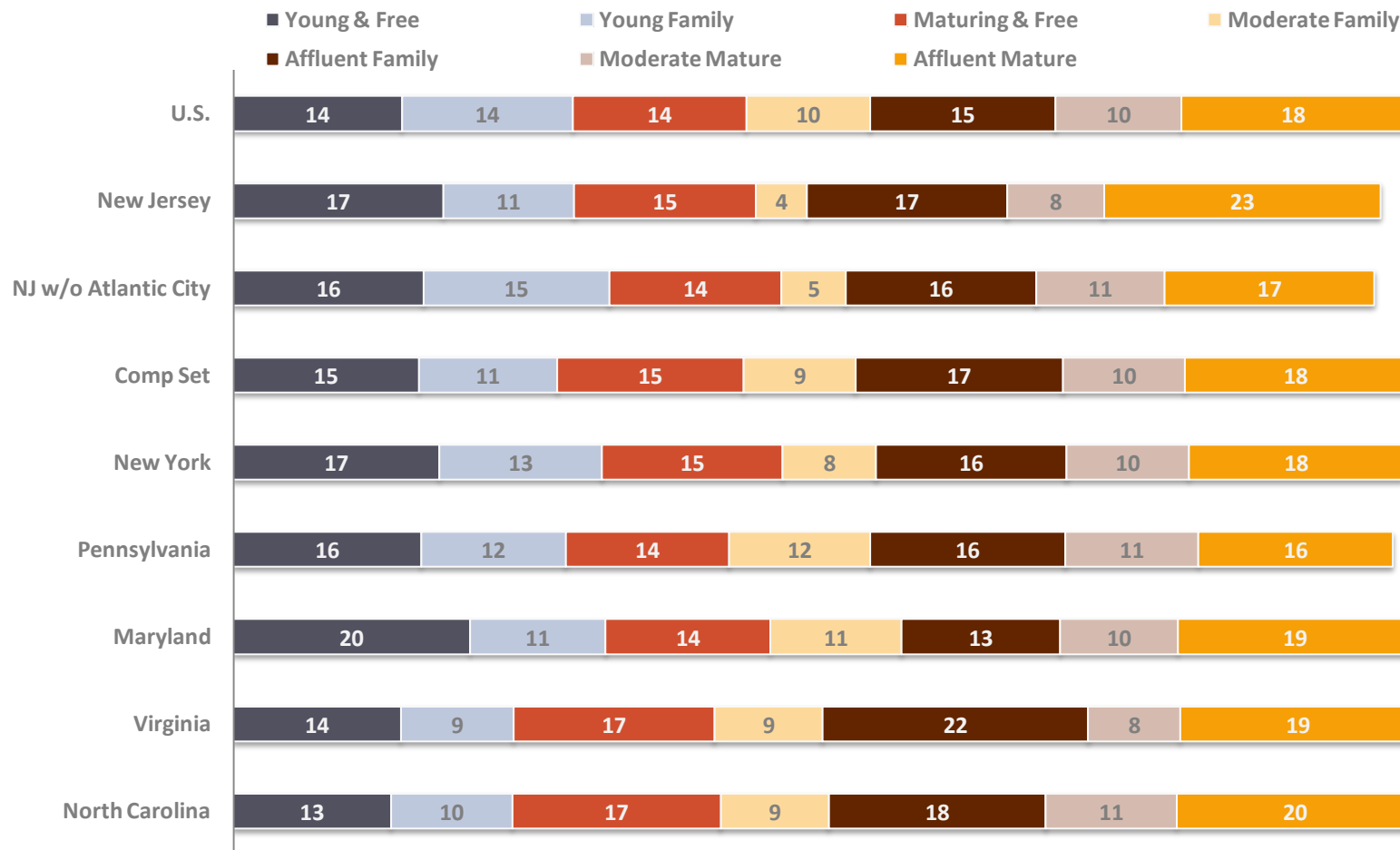


Chart 14 • Segment: 2012 Overnight Leisure Person-Stays (%) • New Jersey N = 1,125 household count



## New Jersey Avg. Party per Trip Spending by Lifestage

DEMOGRAPHICS

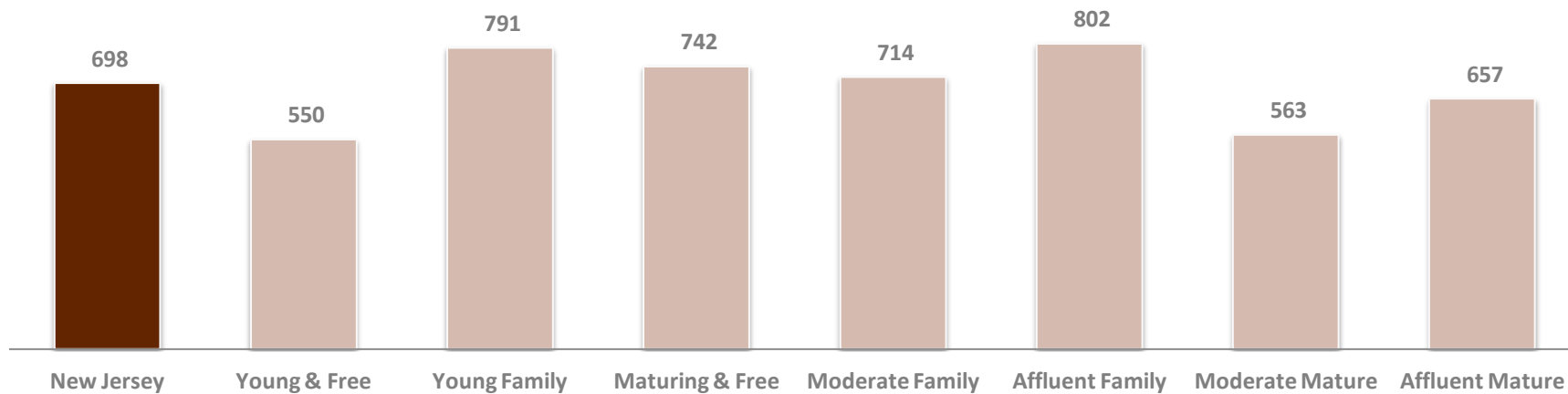


Chart 15 • Segment: 2010-2012 Overnight Leisure Stays (\$) • New Jersey N = 3,683 household count

# New Jersey Lifestage Comparison

DEMOGRAPHICS

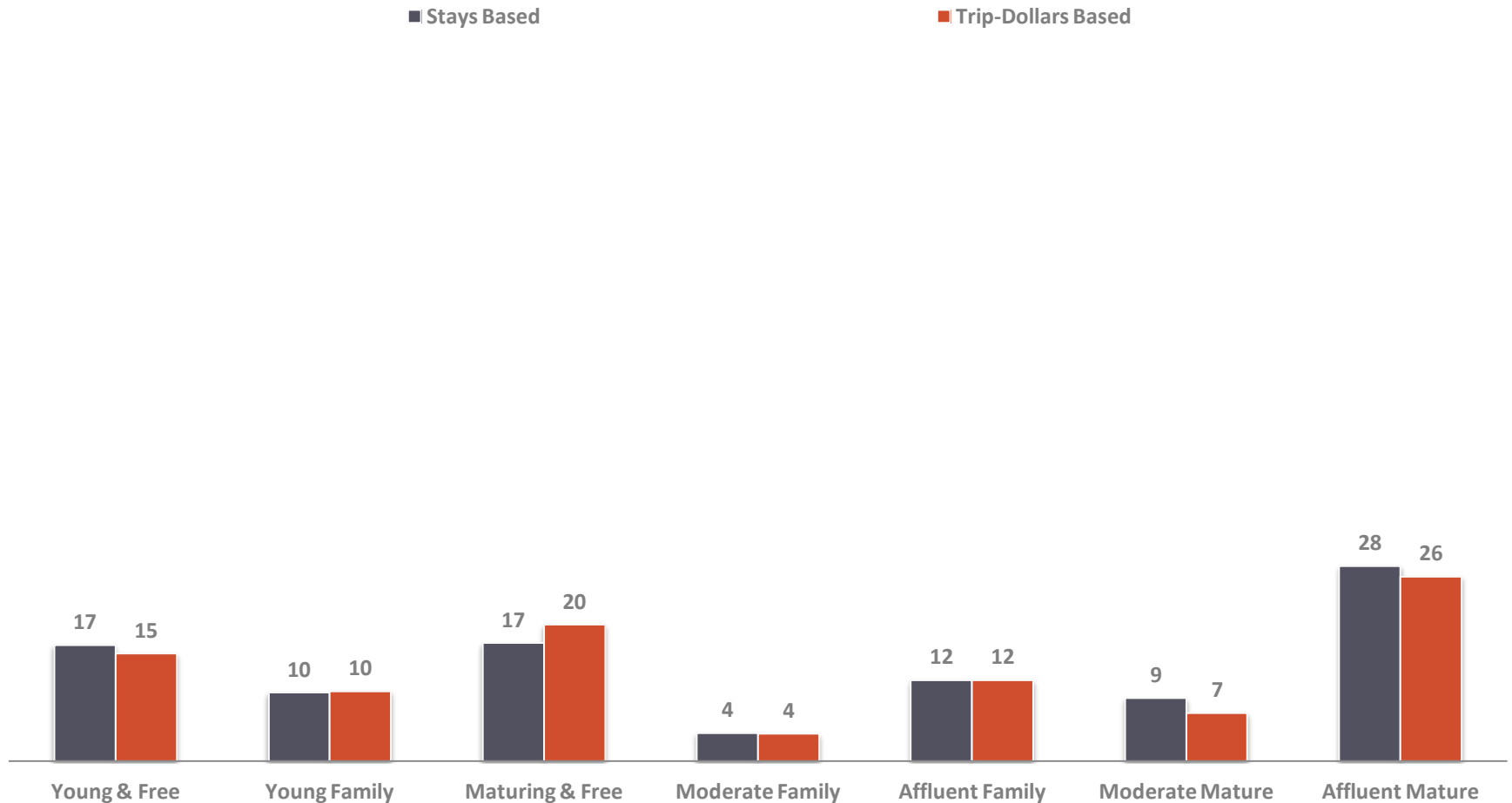


Chart 16 • Segment: 2010-2012 Overnight Leisure (%) • New Jersey N = 4,004 household count

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

DEMOGRAPHICS

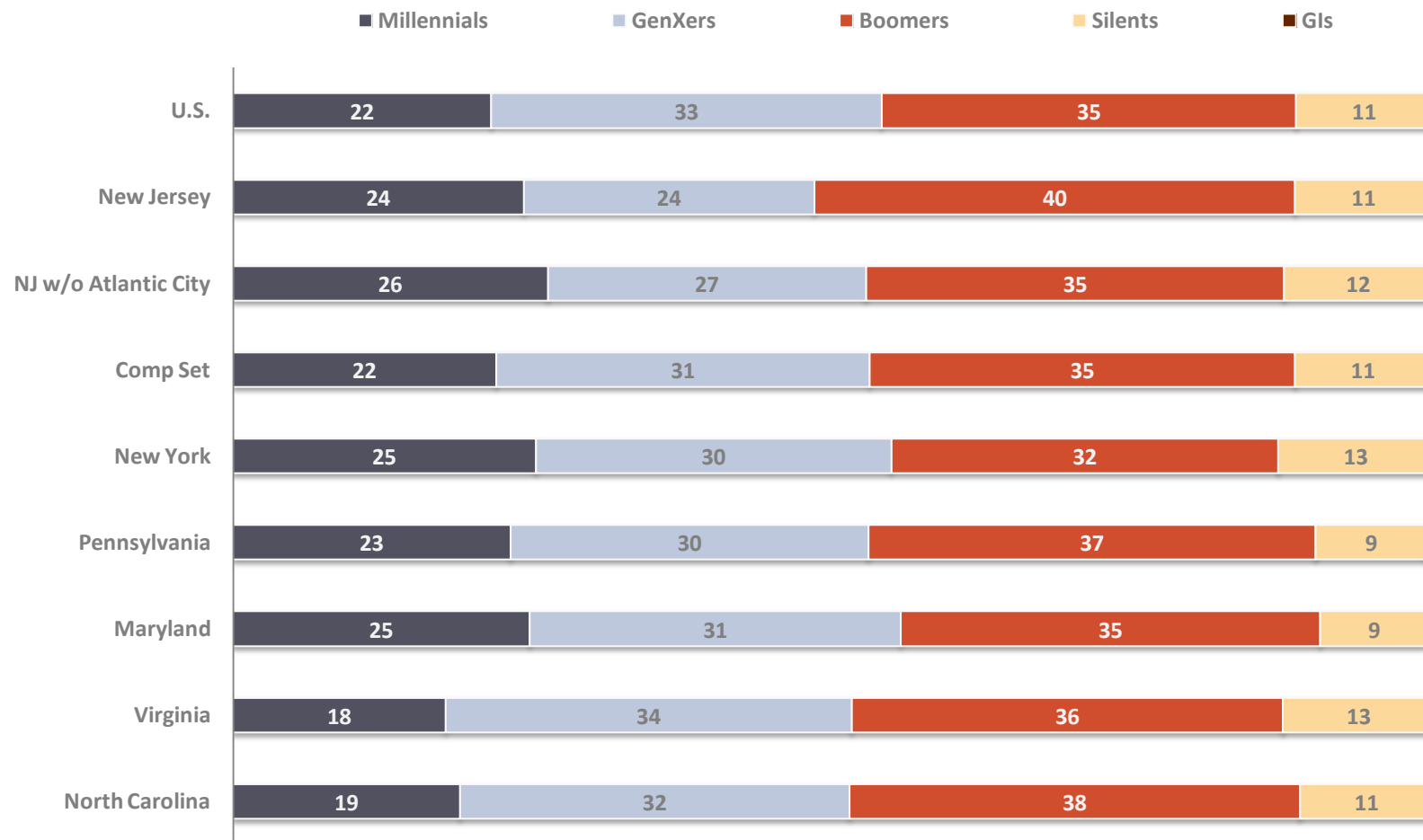


Chart 17 • Segment: 2012 Overnight Leisure Person-Stays (%) • New Jersey N = 1,125 household count

## New Jersey Avg. Party per Trip Spending by Generation

DEMOGRAPHICS

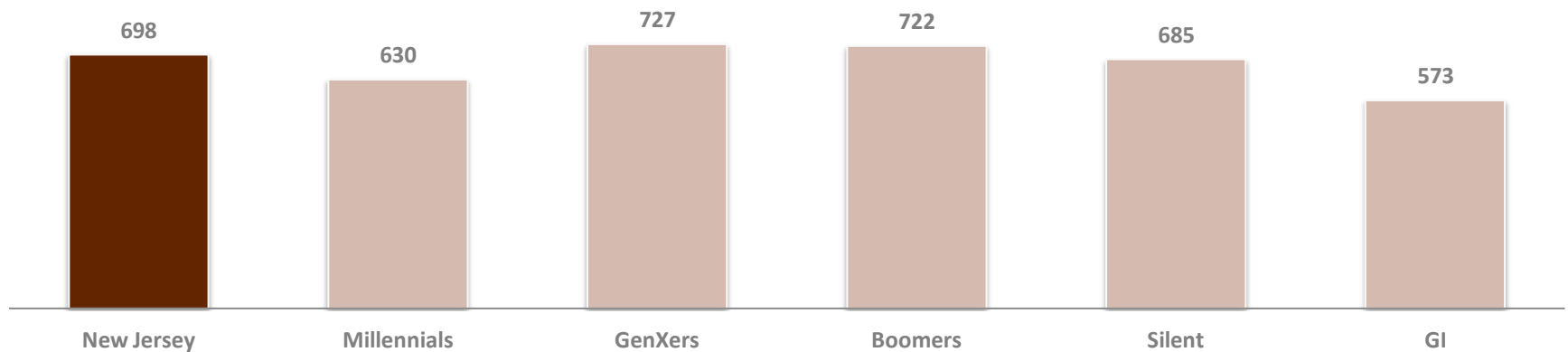


Chart 18 • Segment: 2010-2012 Overnight Leisure Stays (\$) • New Jersey N = 3,682 household count

# New Jersey Traveler Generation Comparison

DEMOGRAPHICS

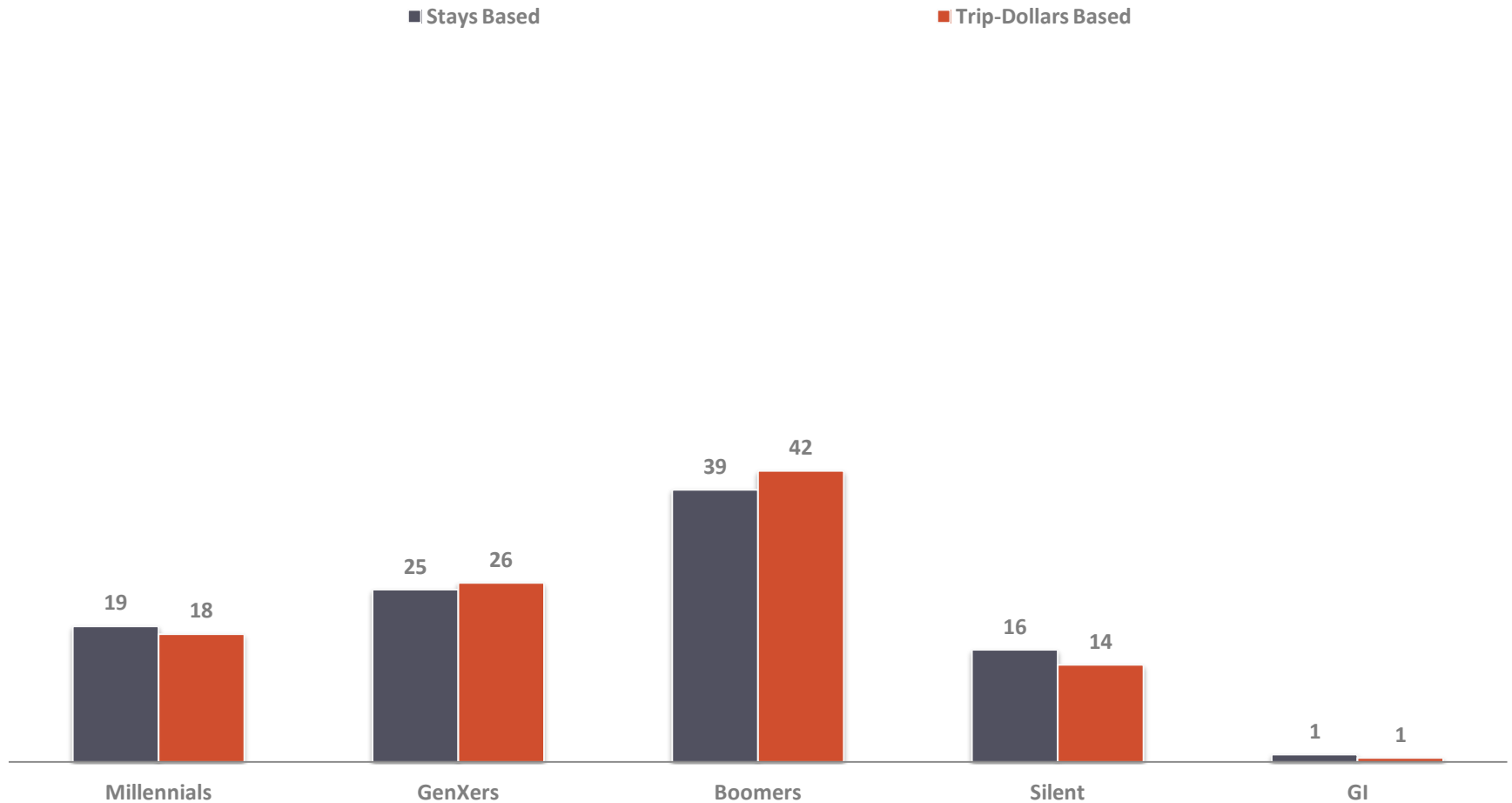
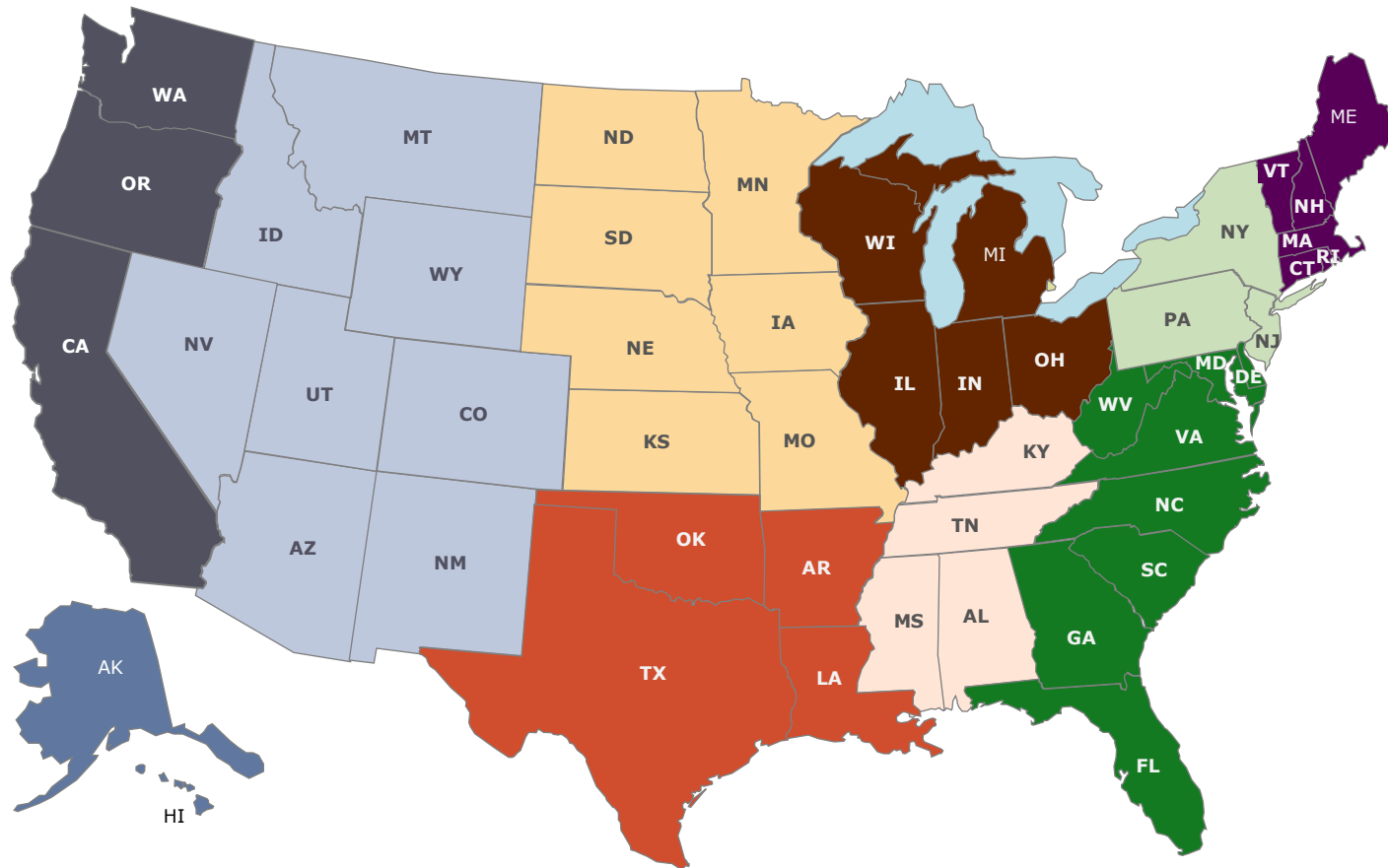


Chart 19 • Segment: 2010-2012 Overnight Leisure (%) • New Jersey N = 4,003 household count

# Origin Divisions for Travel to New Jersey

TRIP ORIGIN



## LEGEND

Pacific	0.5%
Mountain	1.6%
West North Central	0.2%
West South Central	0.9%
East North Central	1.5%
East South Central	0.5%
New England	6.4%
Middle Atlantic	69.3%
South Atlantic	19.1%

Chart 20 • Segment: 2012 Overnight Leisure Person-Stays (%) • New Jersey N = 1,125 household count

# Top Origin States to New Jersey

TRIP ORIGIN

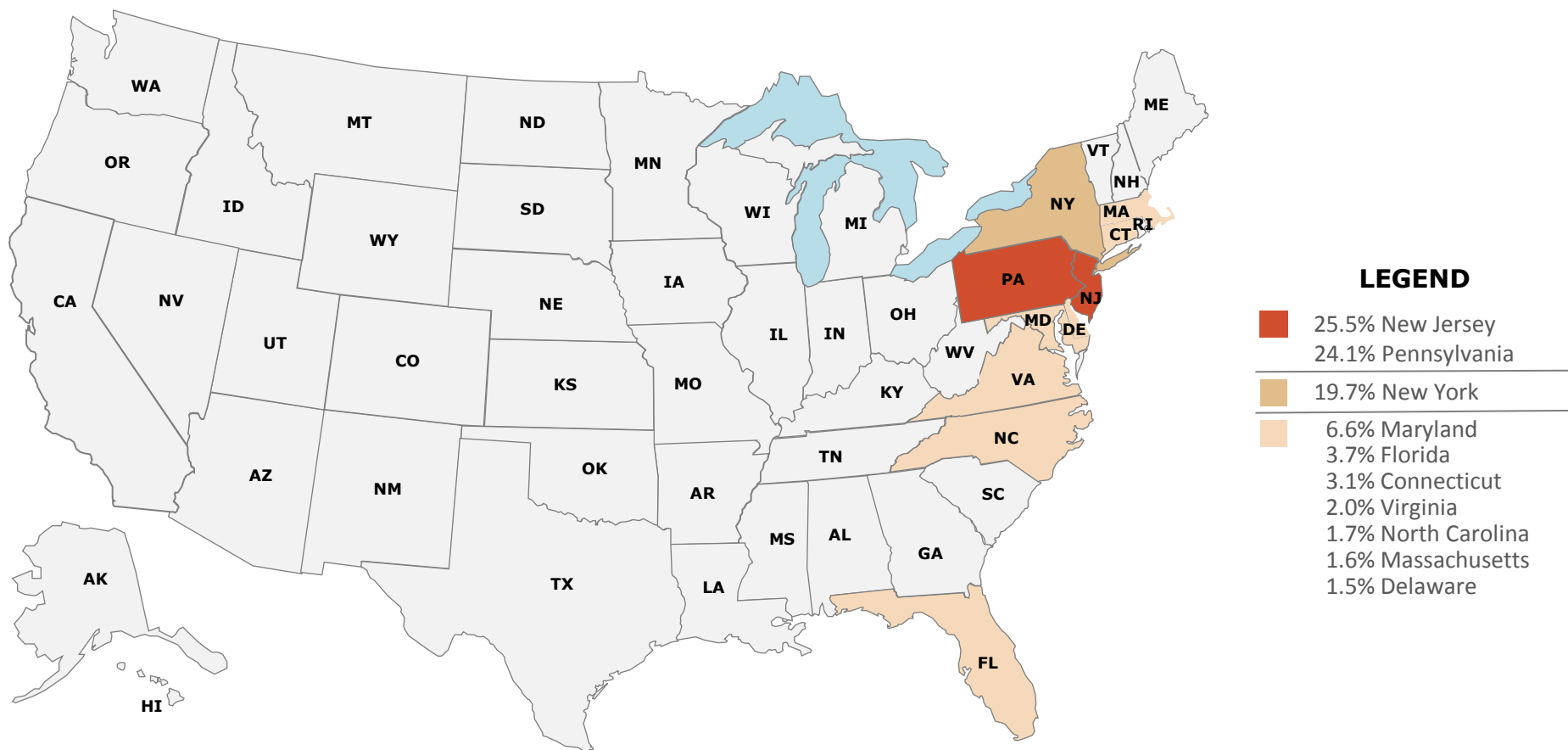


Chart 21 • Segment: 2012 Overnight Leisure Person-Stays (%) • New Jersey N = 1,125 household count

## 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
<b>New York, NY</b>	5.2%	34.3%	28.9%	12.5%	20.5%	14.3%	10.9%	7.2%	5.4%
<b>Philadelphia, PA</b>	2.6%	24.5%	24.0%	7.1%	5.4%	16.2%	9.7%	5.1%	2.0%
<b>Washington, DC (Hagerstown, MD)</b>	2.5%	5.6%	5.5%	8.8%	3.5%	7.5%	16.6%	21.2%	5.7%
<b>Baltimore, MD</b>	0.9%	3.8%	1.7%	2.9%	2.2%	2.4%	12.7%	2.8%	1.0%
<b>Wilkes Barre-Scranton, PA</b>	0.6%	3.6%	1.7%	2.1%	1.3%	5.3%	1.1%	2.3%	0.7%
<b>Albany-Schenectady- Troy, NY</b>	0.7%	3.1%	2.9%	2.1%	4.9%	1.0%	2.5%	1.0%	0.4%
<b>Hartford &amp; New Haven, CT</b>	1.0%	2.6%	3.2%	1.7%	2.4%	2.8%	0.7%	0.8%	0.9%
<b>Harrisburg-Lancaster- Lebanon-York, PA</b>	0.5%	1.8%	2.0%	1.7%	0.4%	4.2%	5.9%	0.8%	0.2%
<b>Johnstown-Altoona, PA</b>	0.4%	1.5%	2.1%	1.8%	0.8%	5.2%	3.6%	1.2%	0.2%
<b>Las Vegas, NV</b>	0.7%	1.4%	2.4%	0.2%	0.2%	0.2%	0.0%	0.2%	0.1%
<b>Top 10 Sum</b>	<b>15.1%</b>	<b>82.2%</b>	<b>74.4%</b>	<b>40.9%</b>	<b>41.6%</b>	<b>59.1%</b>	<b>63.7%</b>	<b>42.6%</b>	<b>16.6%</b>

Chart 22 • Segment: 2012 Overnight Leisure Person-Stays (%) • New Jersey N = 1,124 household count



## New Jersey Avg. Party per Trip Spending by Origin DMA

TRIP ORIGIN

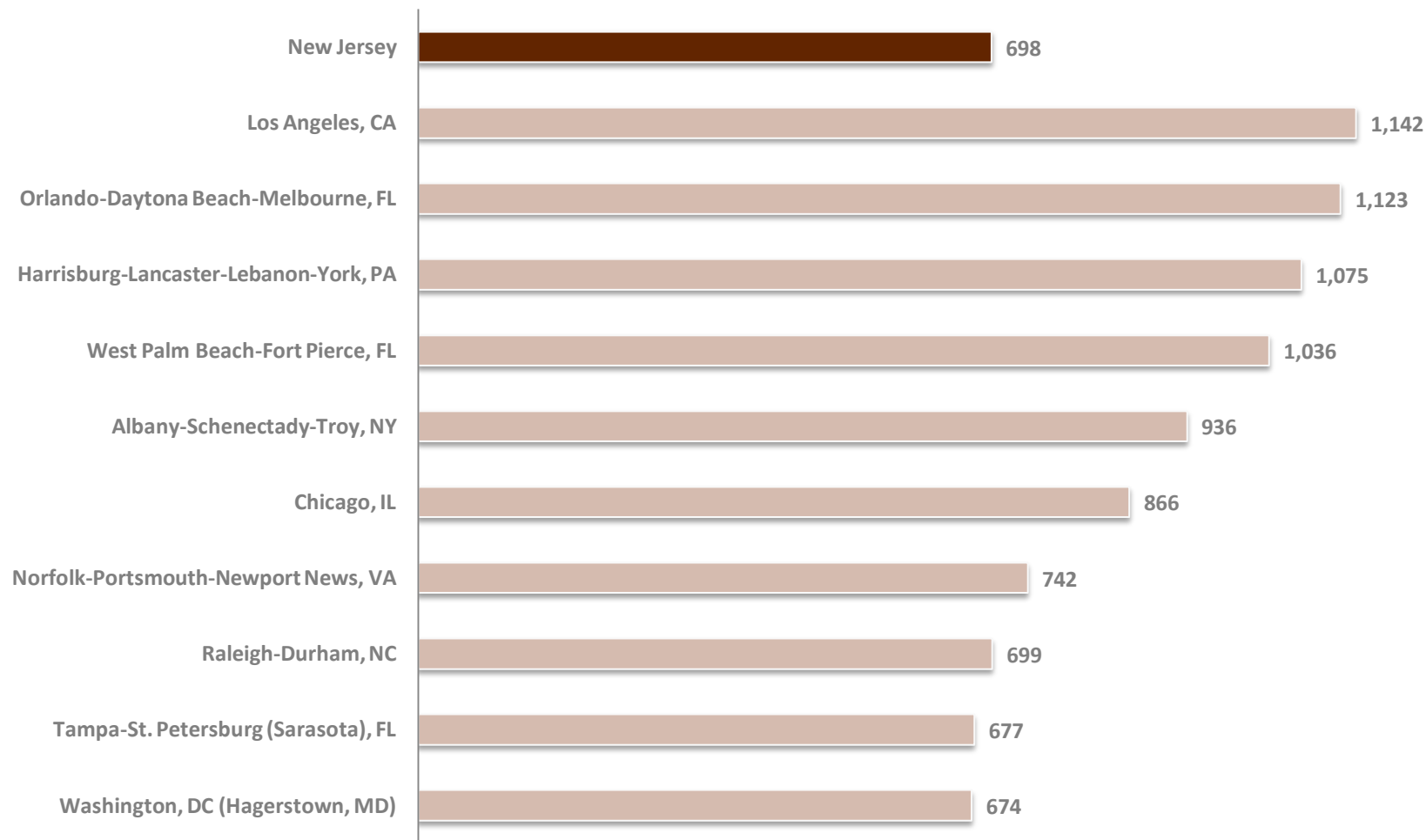


Chart 23 • Segment: 2010-2012 Overnight Leisure Stays (\$) • New Jersey N = 3,653 household count

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

TRIP ORIGIN

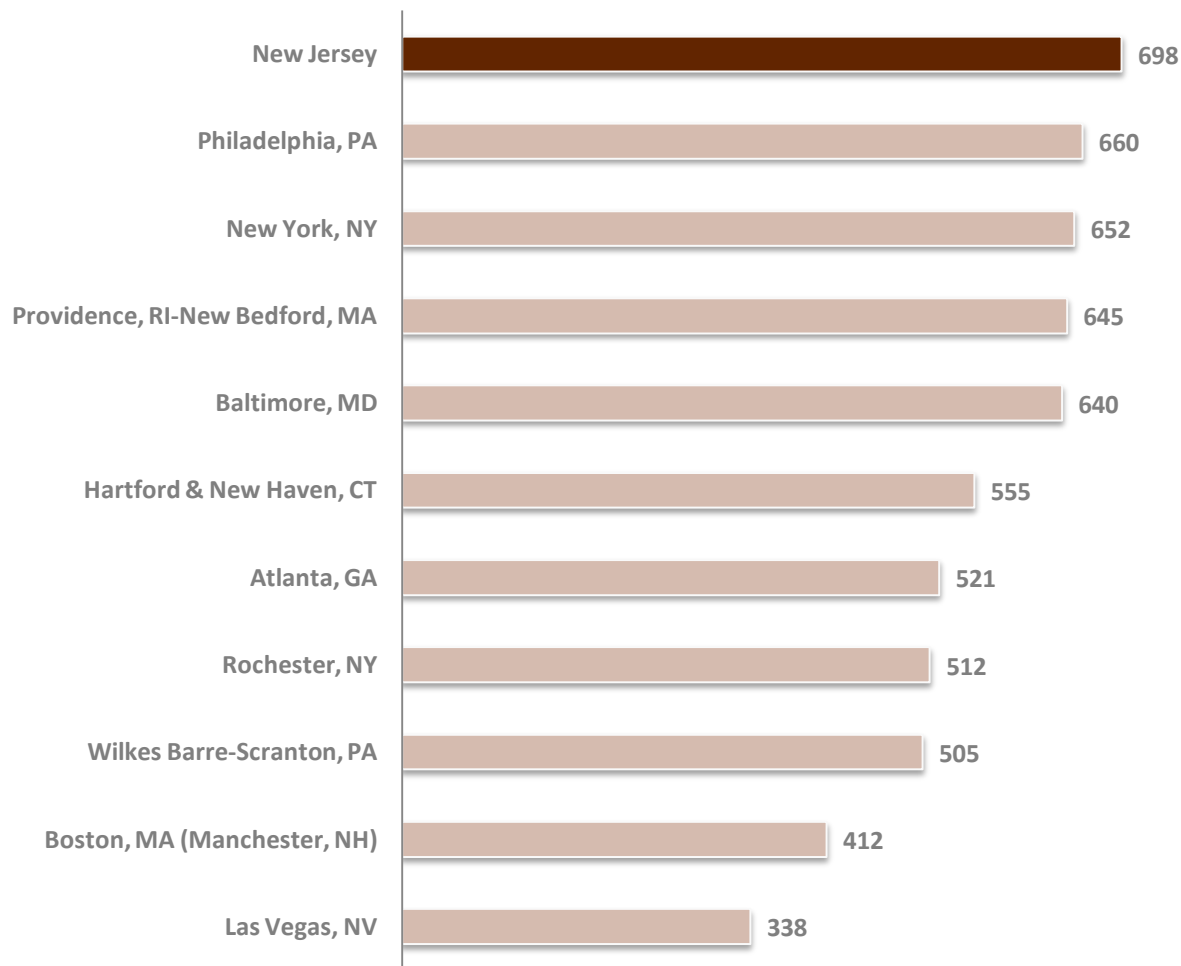


Chart 24 • Segment: 2010-2012 Overnight Leisure Stays (\$) • New Jersey N = 3,653 household count

# New Jersey Origin DMA Comparison

TRIP ORIGIN

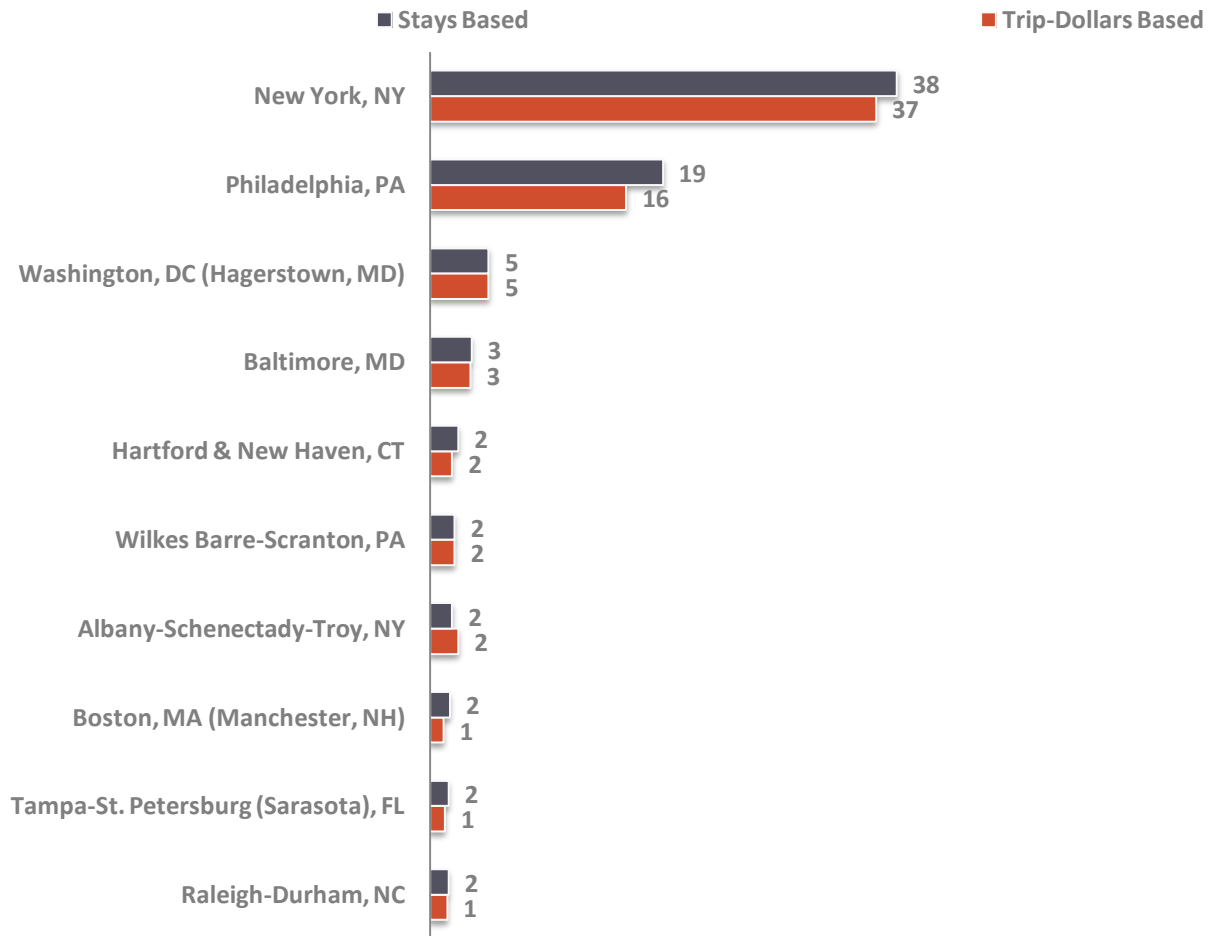


Chart 25 • Segment: 2010-2012 Overnight Leisure (%) • New Jersey N = 3,970 household count

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

TRANSPORTATION

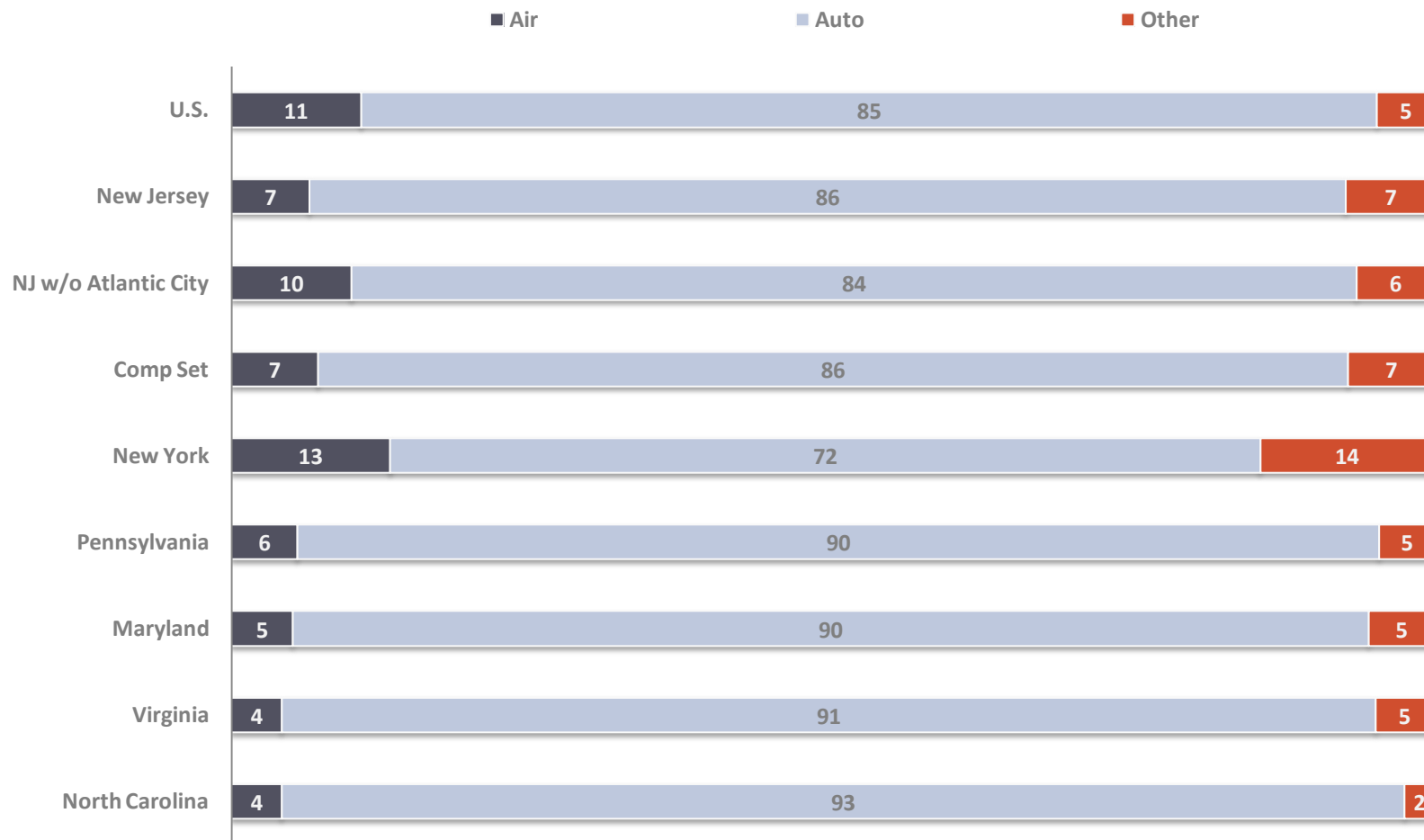


Chart 26 • Segment: 2012 Overnight Leisure Person-Stays (%) • New Jersey N = 1,125 household count

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

TRANSPORTATION

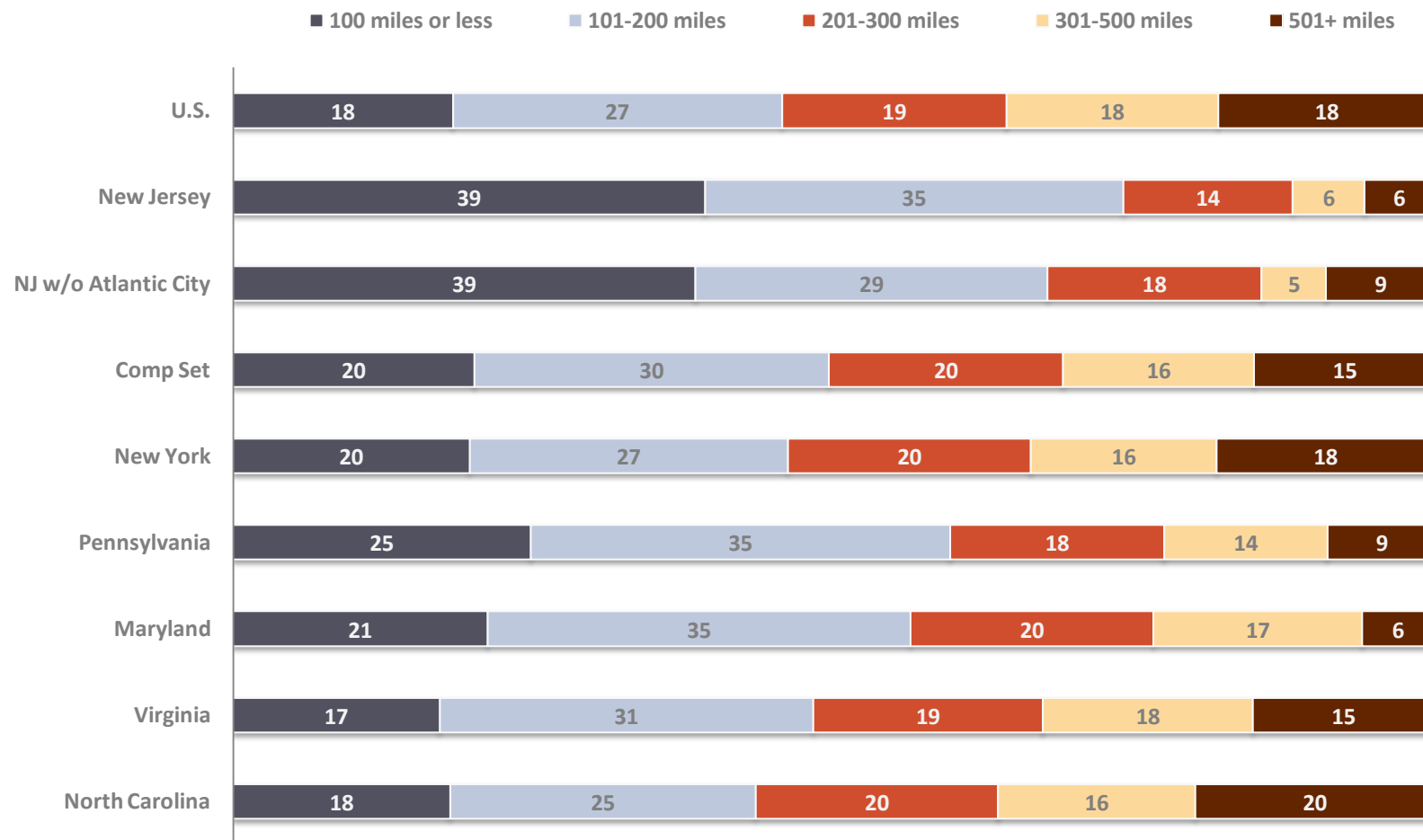


Chart 27 • Segment: 2012 Overnight Leisure Person-Stays (%) • New Jersey N = 902 household count

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

TRANSPORTATION

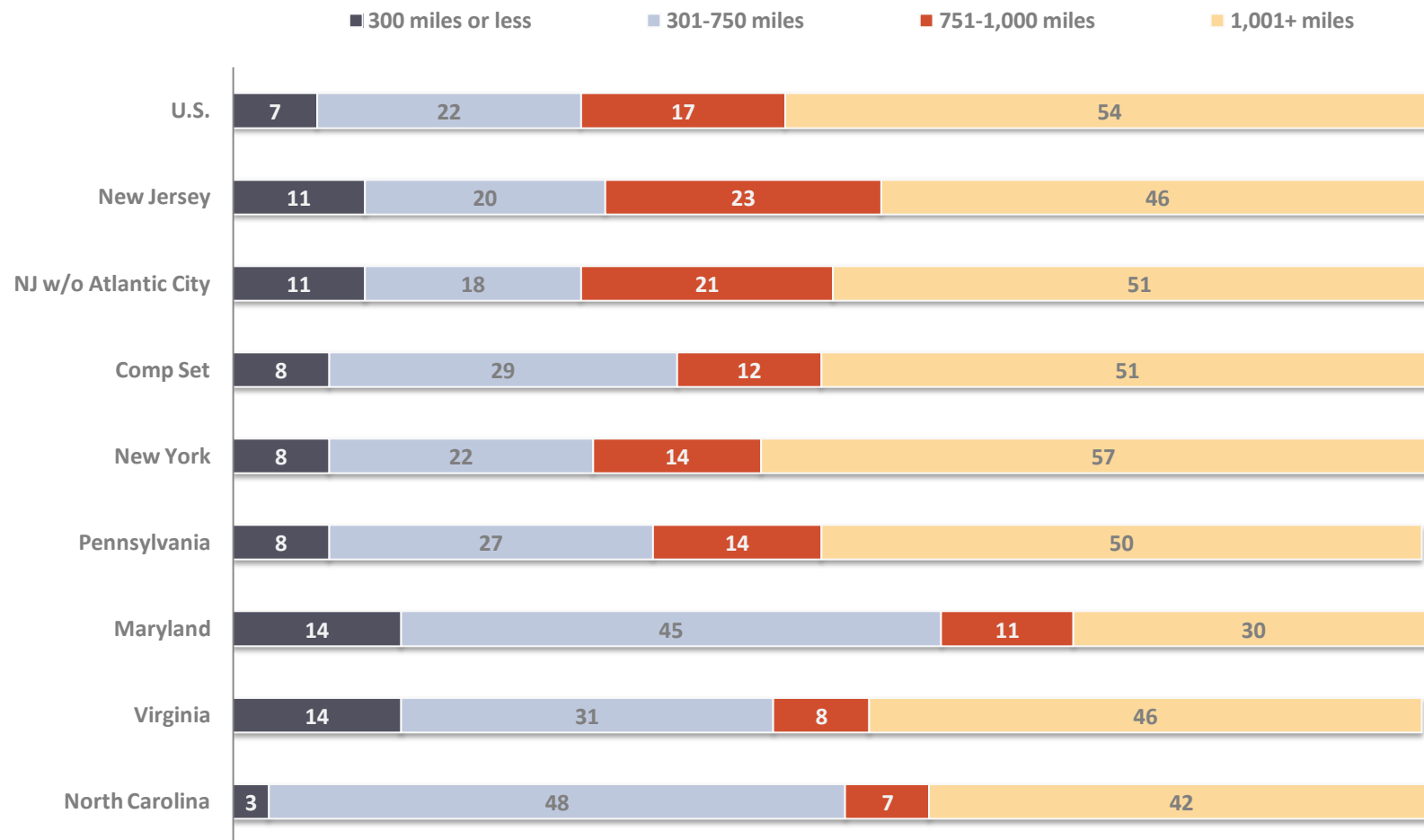


Chart 28 • Segment: 2012 Overnight Leisure Person-Stays (%) • New Jersey N = 148 household count

## New Jersey Month Trip Started

TRIP TIMING

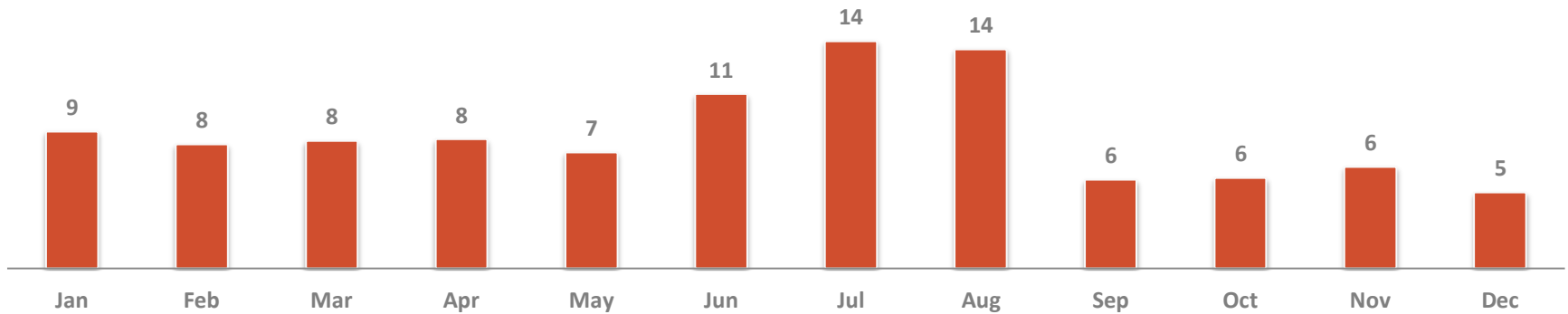


Chart 29 • Segment: 2012 Overnight Leisure Person-Stays (%) • New Jersey N = 1,125 household count

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

TRIP TIMING

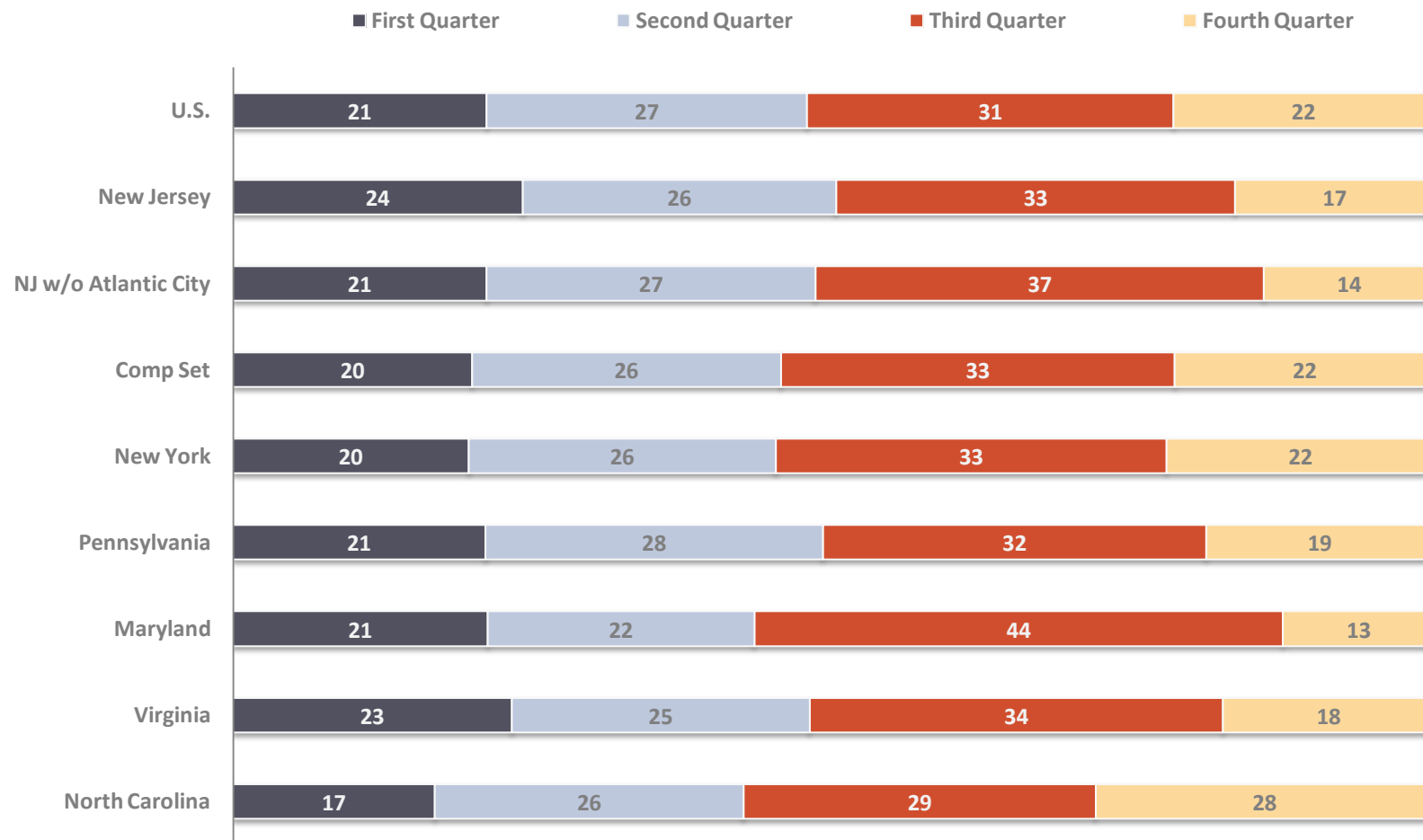


Chart 30 • Segment: 2012 Overnight Leisure Person-Stays (%) • New Jersey N = 1,125 household count



## New Jersey Avg. Party per Trip Spending by Quarter

TRIP TIMING

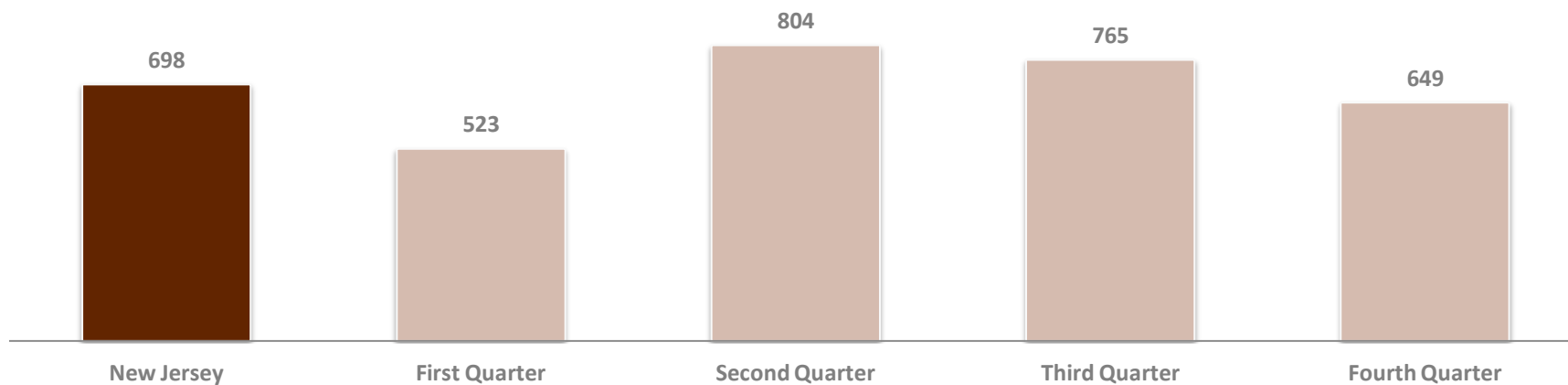


Chart 31 • Segment: 2010-2012 Overnight Leisure Stays (\$) • New Jersey N = 3,683 household count

# New Jersey Trip Timing Comparison by Quarter

TRIP TIMING

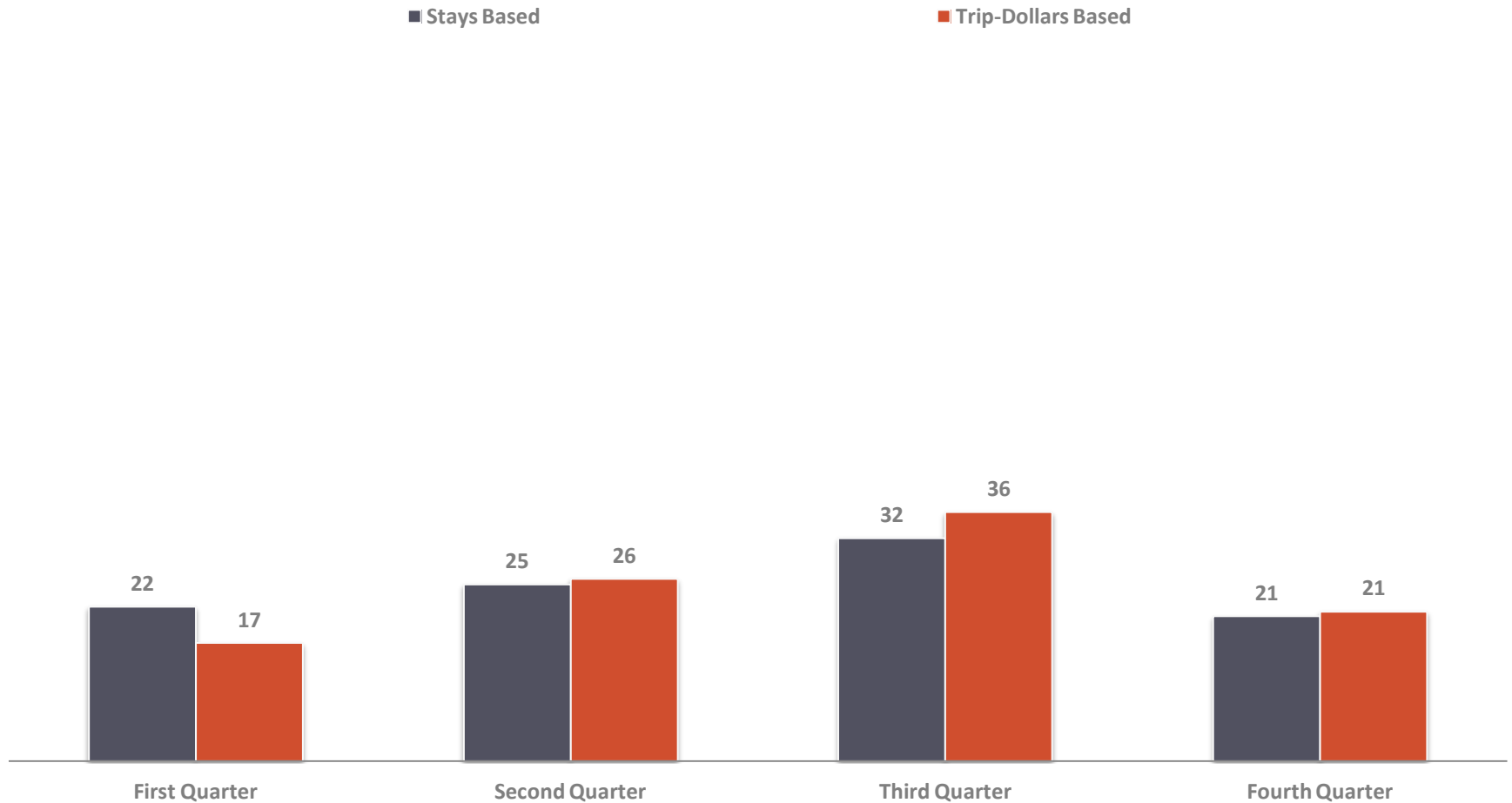


Chart 32 • Segment: 2010-2012 Overnight Leisure (%) • New Jersey N = 4,004 household count

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

TRIP TIMING

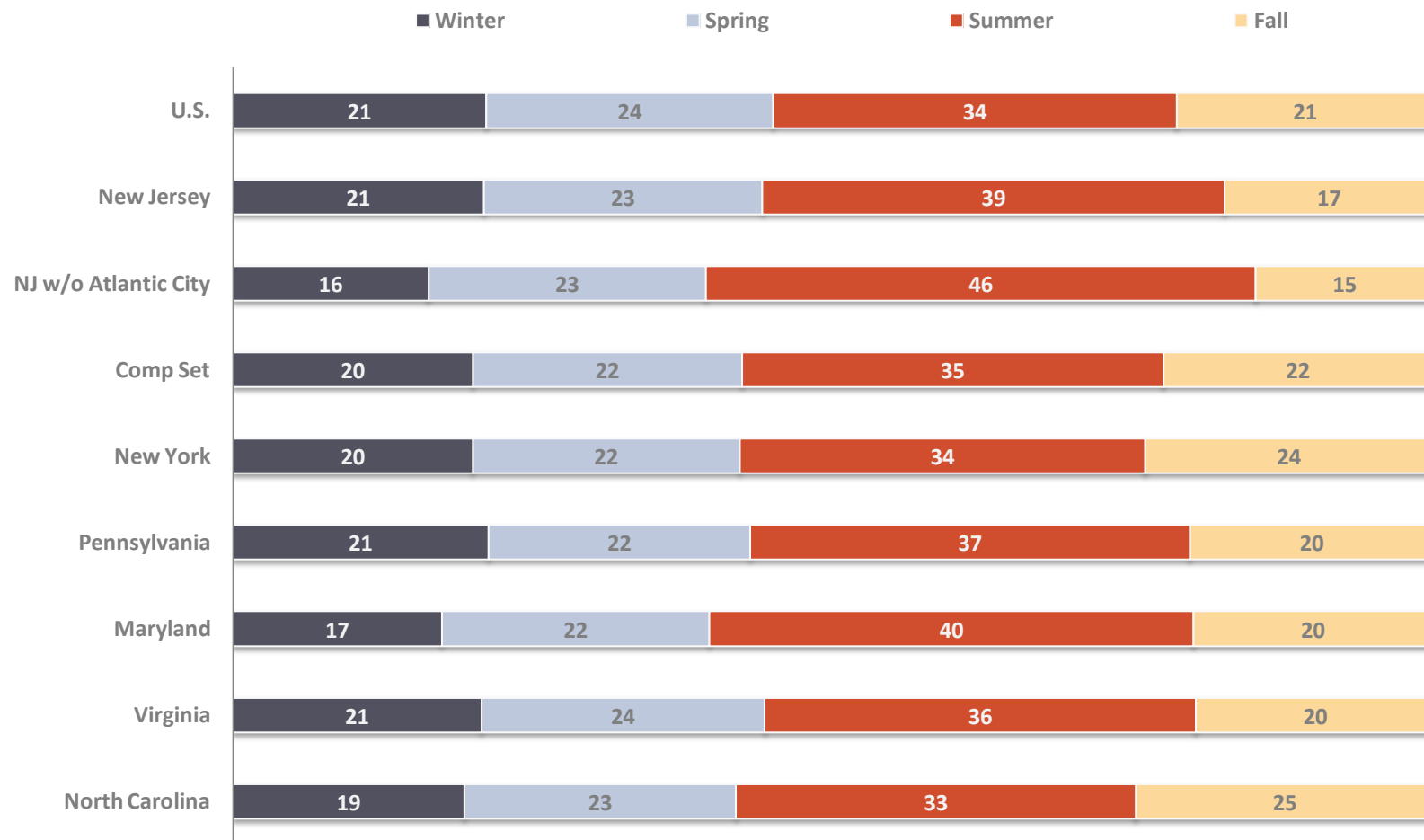


Chart 33 • Segment: 2010-2012 Overnight Leisure Person-Stays (%) • New Jersey N = 1,125 household count

## New Jersey Avg. Party per Trip Spending by Season

TRIP TIMING

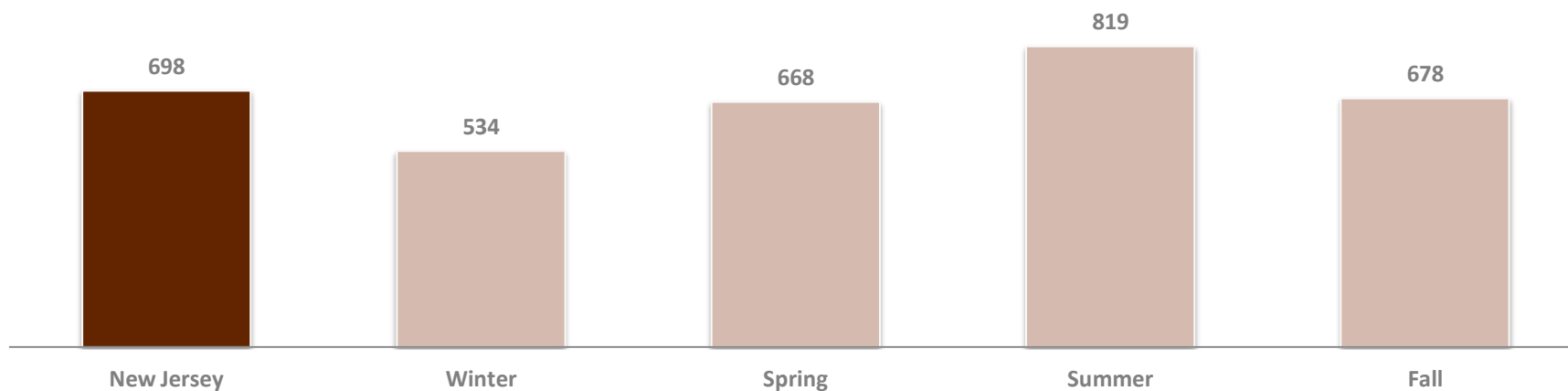


Chart 34 • Segment: 2010-2012 Overnight Leisure Stays (\$) • New Jersey N = 3,683 household count

## New Jersey Trip Timing Comparison by Season

TRIP TIMING

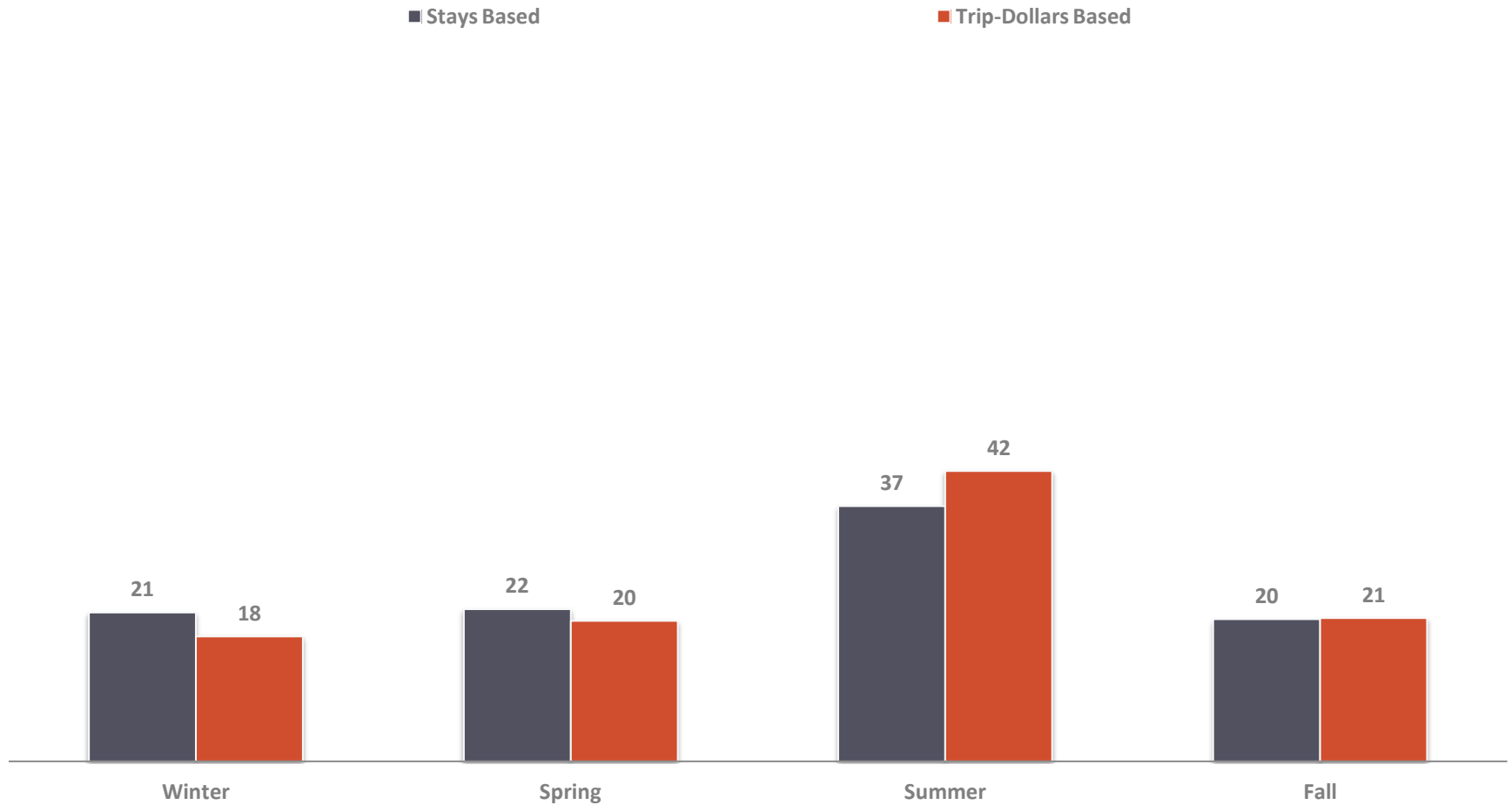


Chart 35 • Segment: 2010-2012 Overnight Leisure (%) • New Jersey N = 4,004 household count

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

## TRIP CHARACTERISTICS

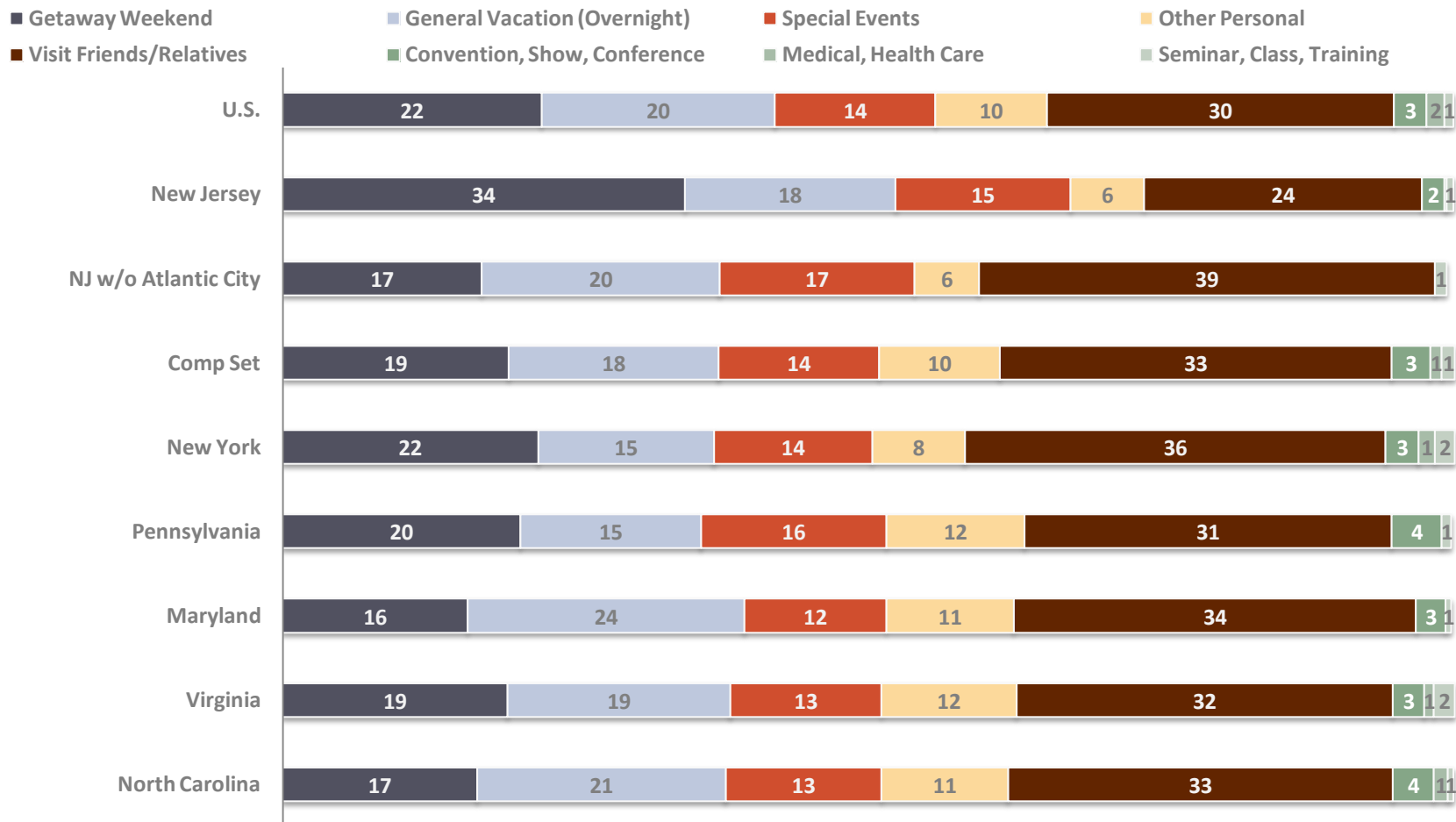


Chart 36 • Segment: 2012 Overnight Leisure Person-Stays (%) • New Jersey N = 1,125 household count

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

TRIP CHARACTERISTICS

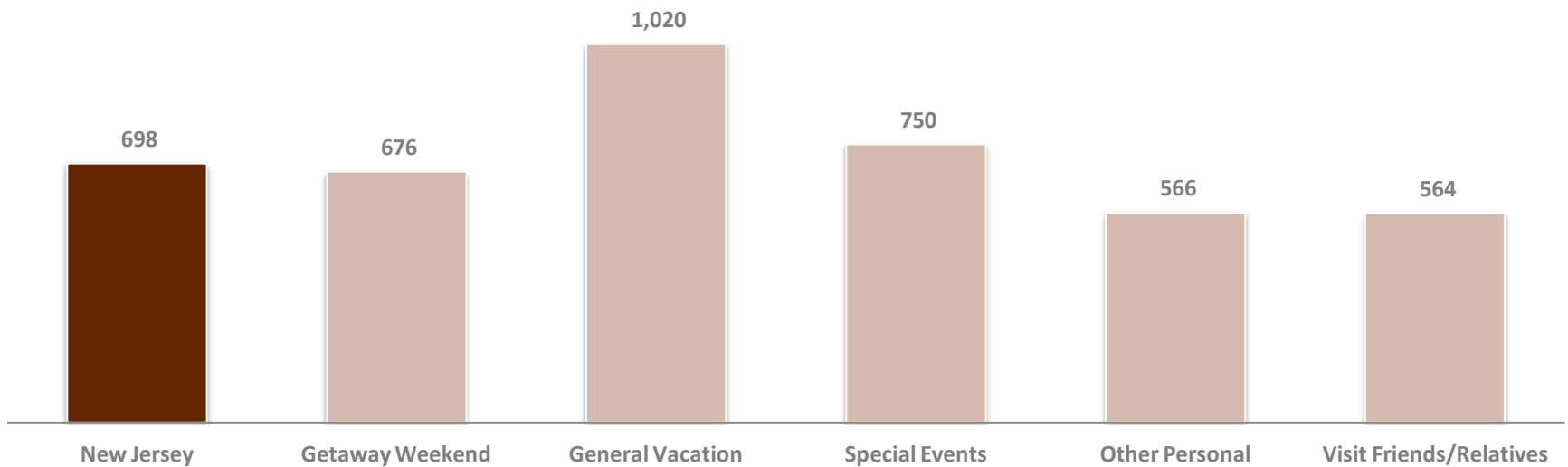


Chart 37 • Segment: 2010-2012 Overnight Leisure Stays (\$) • New Jersey N = 3,683 household count

# New Jersey Purpose of Stay Comparison

## TRIP CHARACTERISTICS

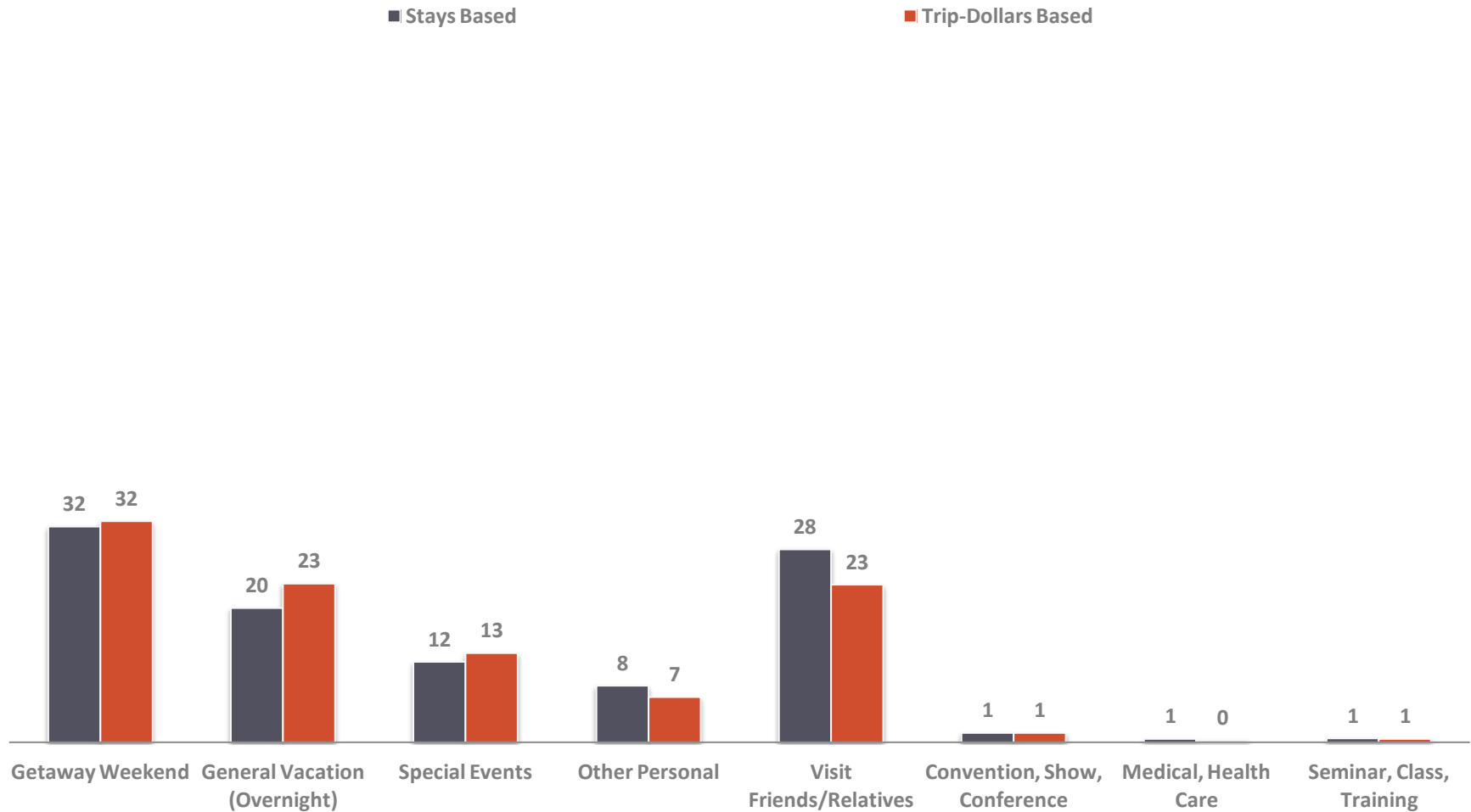


Chart 38 • Segment: 2010-2012 Overnight Leisure (%) • New Jersey N = 4,004 household count



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

TRIP CHARACTERISTICS

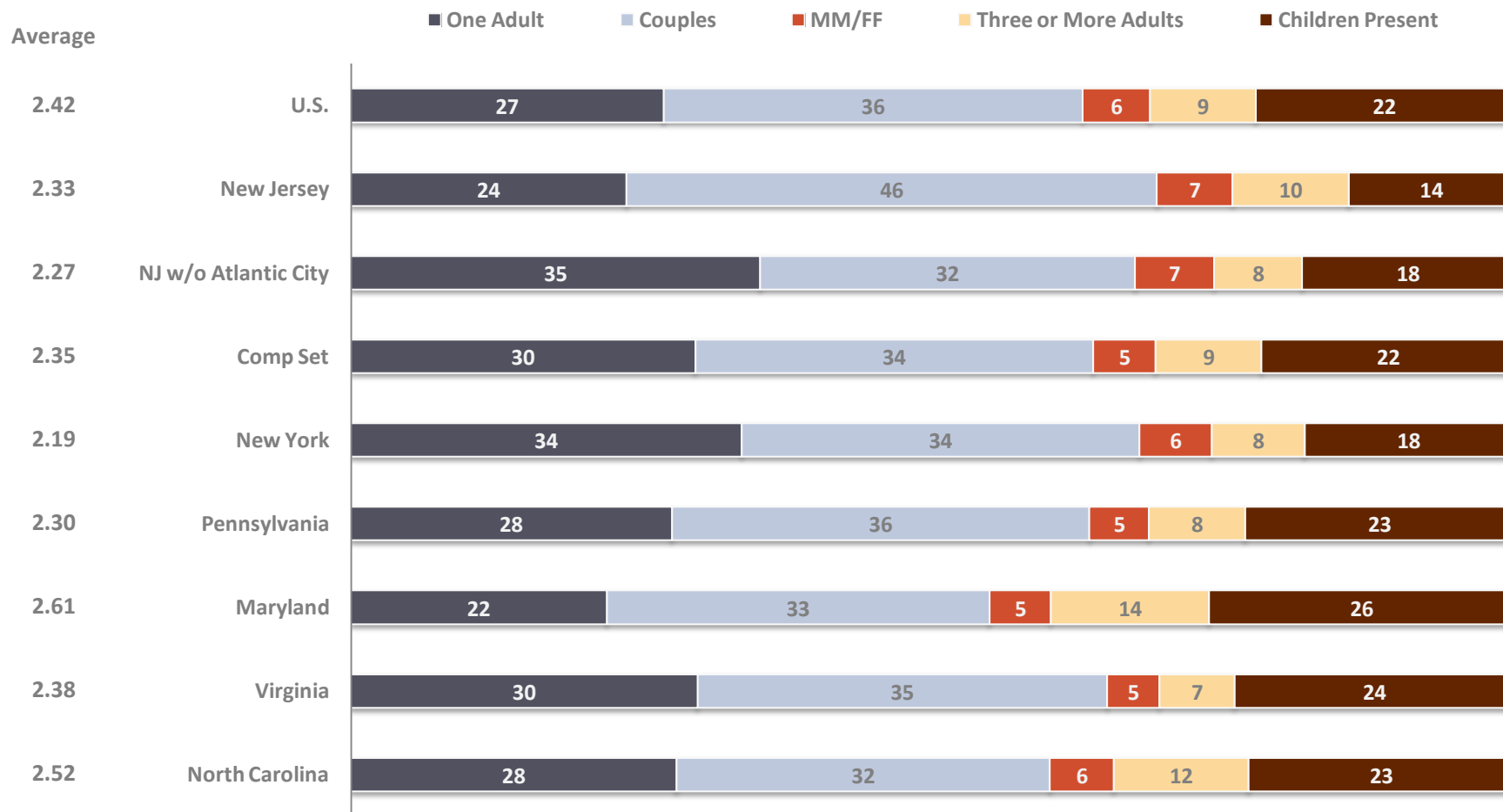


Chart 39 • Segment: 2012 Overnight Leisure Stays (%) • New Jersey N = 1,121 household count

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

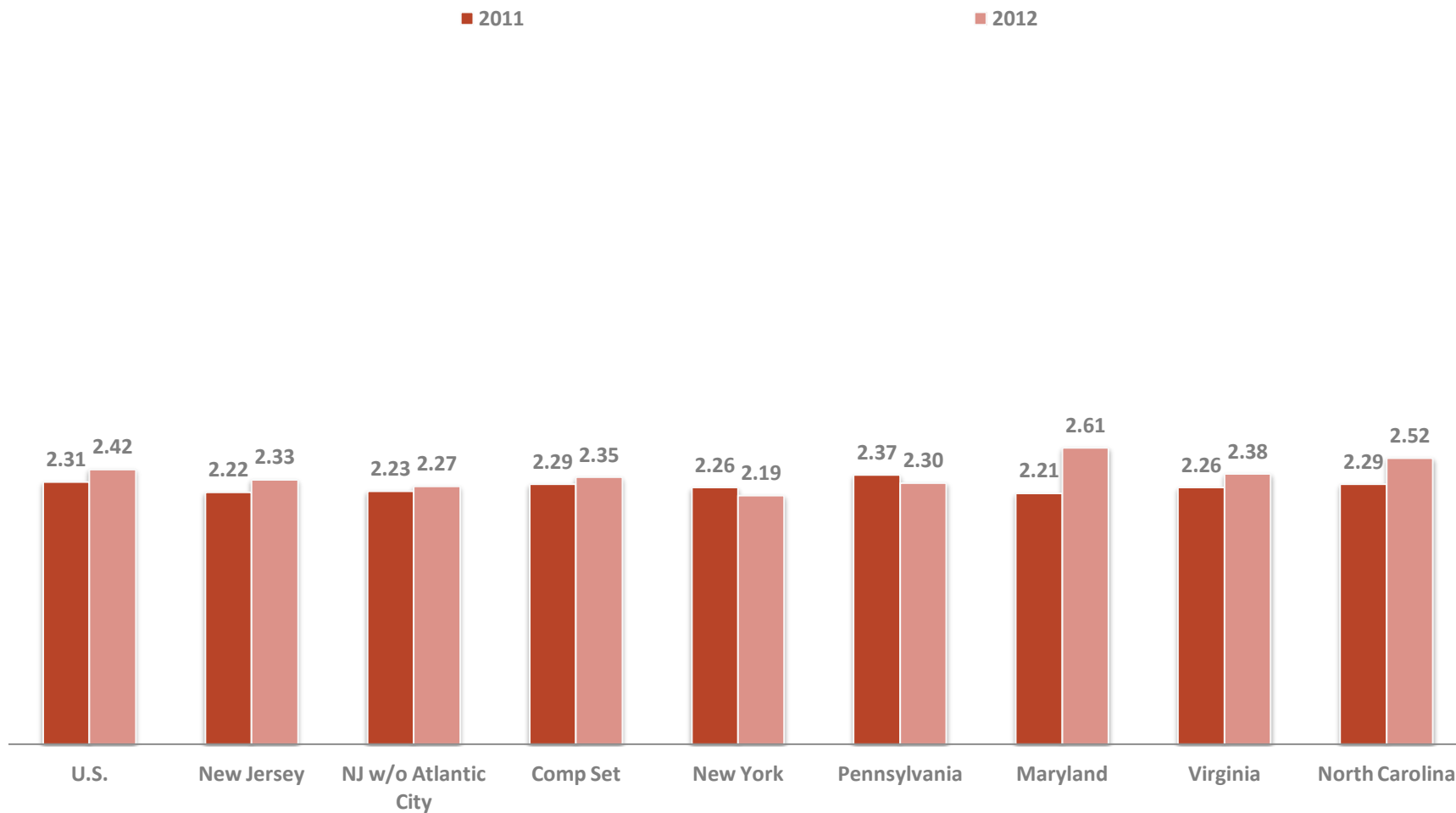


Chart 40 • Segment: 2011/2012 Overnight Leisure Stays • New Jersey N = 1,121 household count

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

TRIP CHARACTERISTICS

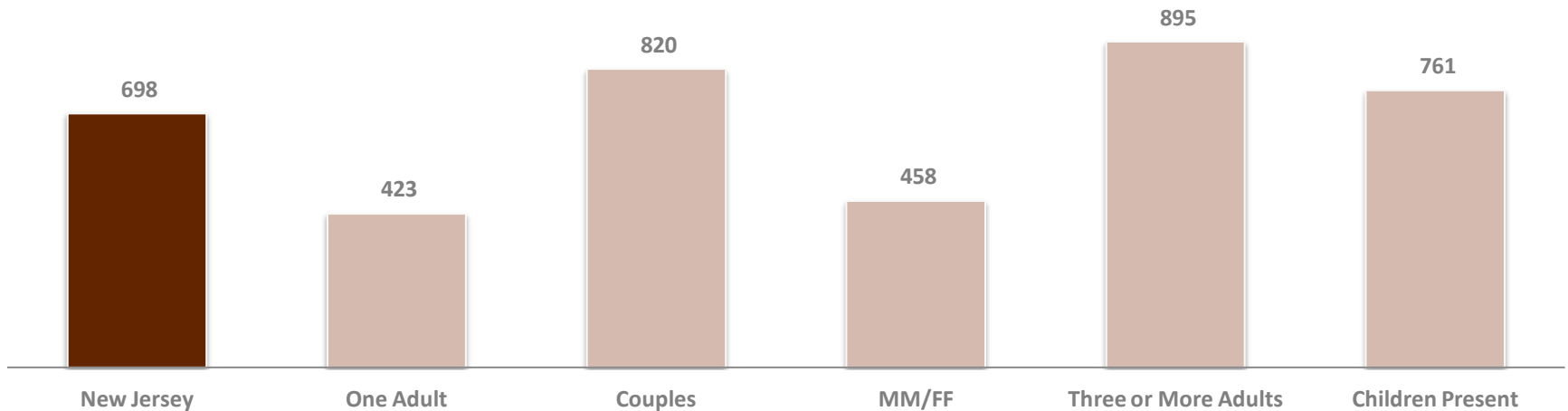


Chart 41 • Segment: 2010-2012 Overnight Leisure Stays (\$) • New Jersey N = 3,254 household count

# New Jersey Travel Party Comparison

## TRIP CHARACTERISTICS

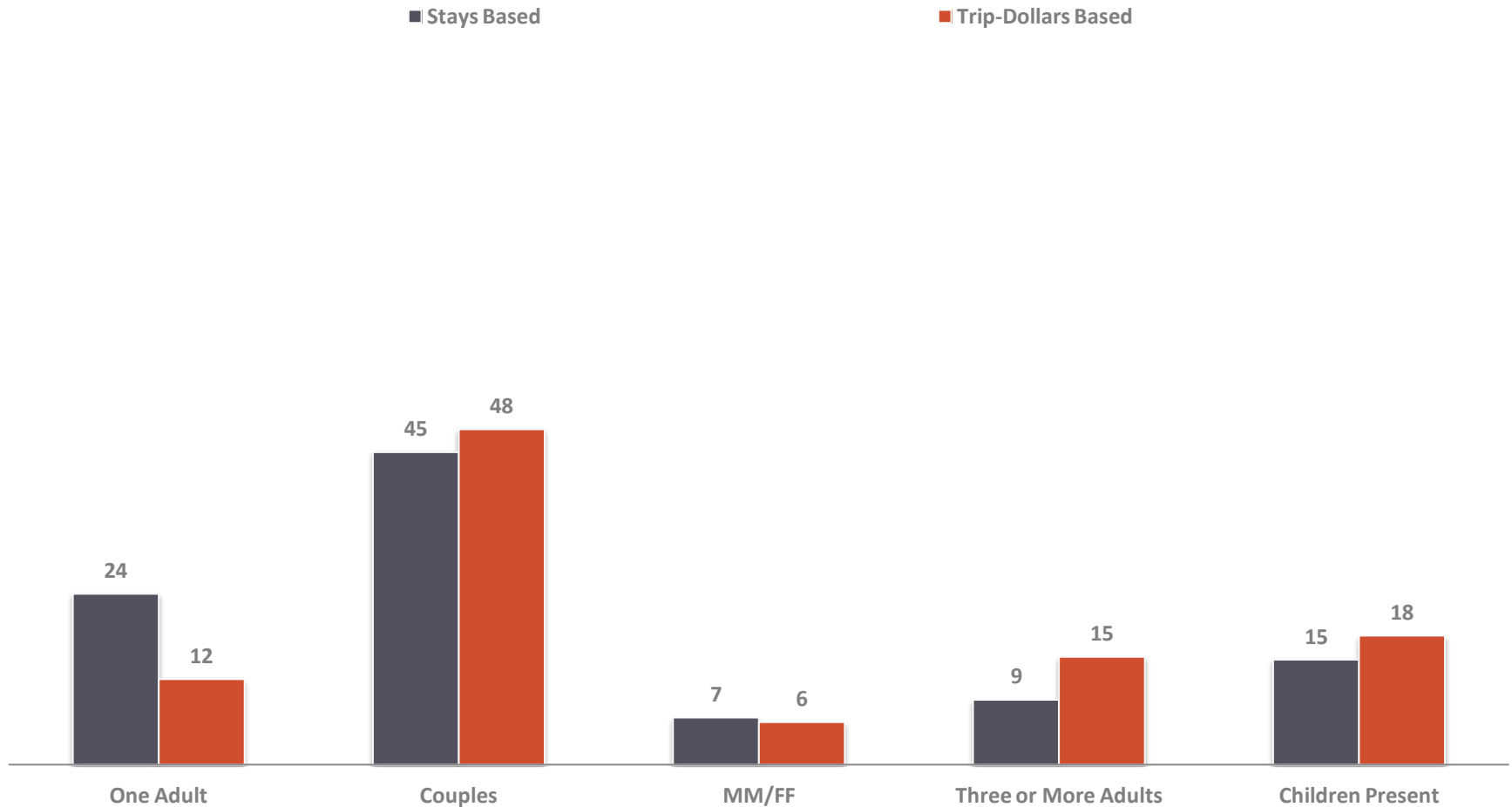


Chart 42 • Segment: 2010-2012 Overnight Leisure (%) • New Jersey N = 3,539 household count

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

## TRIP CHARACTERISTICS

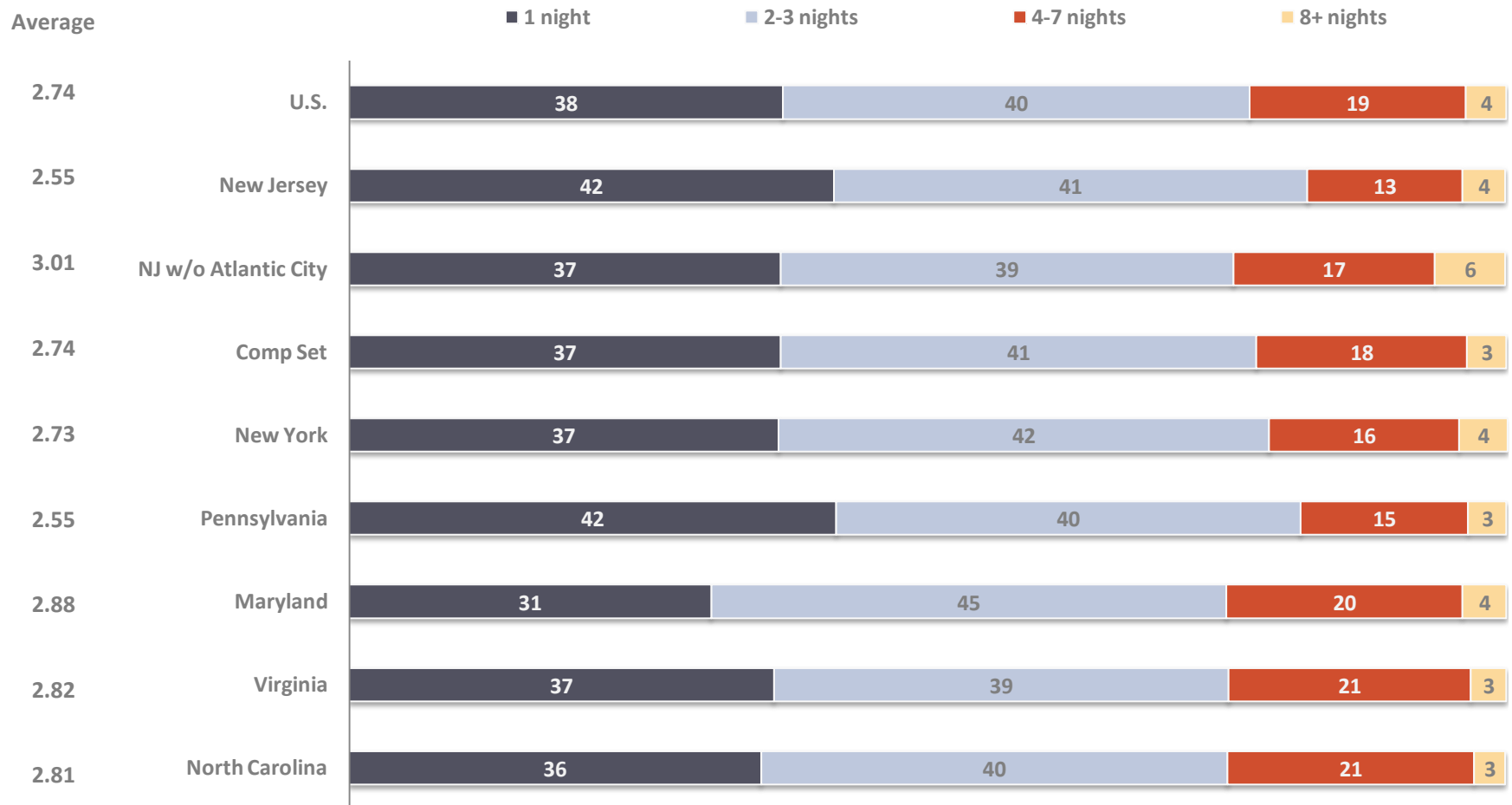


Chart 43 • Segment: 2012 Overnight Leisure Stays (%) • New Jersey N = 1,125 household count

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

### TRIP CHARACTERISTICS

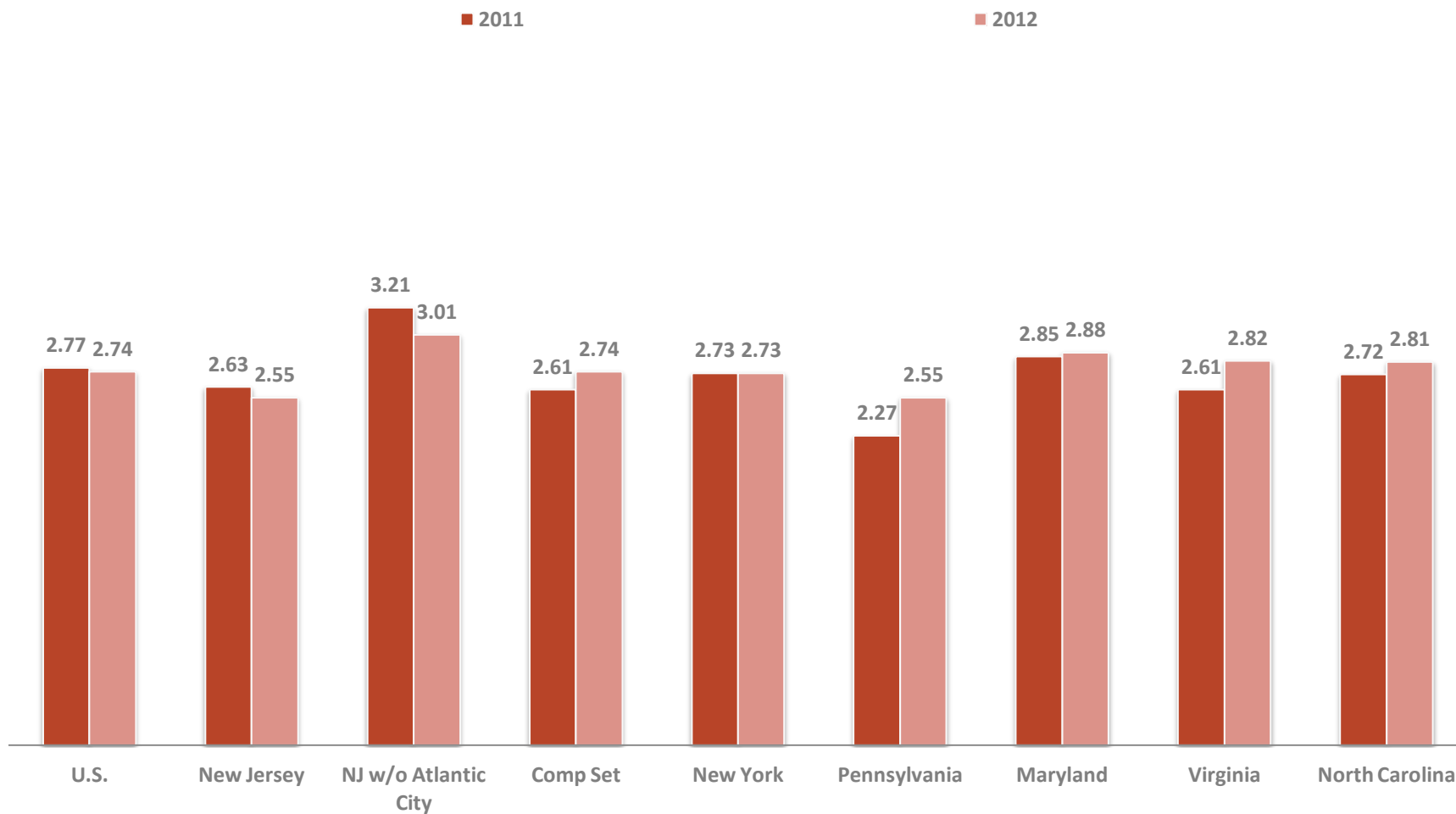


Chart 44 • Segment: 2011/2012 Overnight Leisure Stays • New Jersey N = 1,125 household count

## New Jersey Avg. Party per Trip Spending by Stay Length

TRIP CHARACTERISTICS

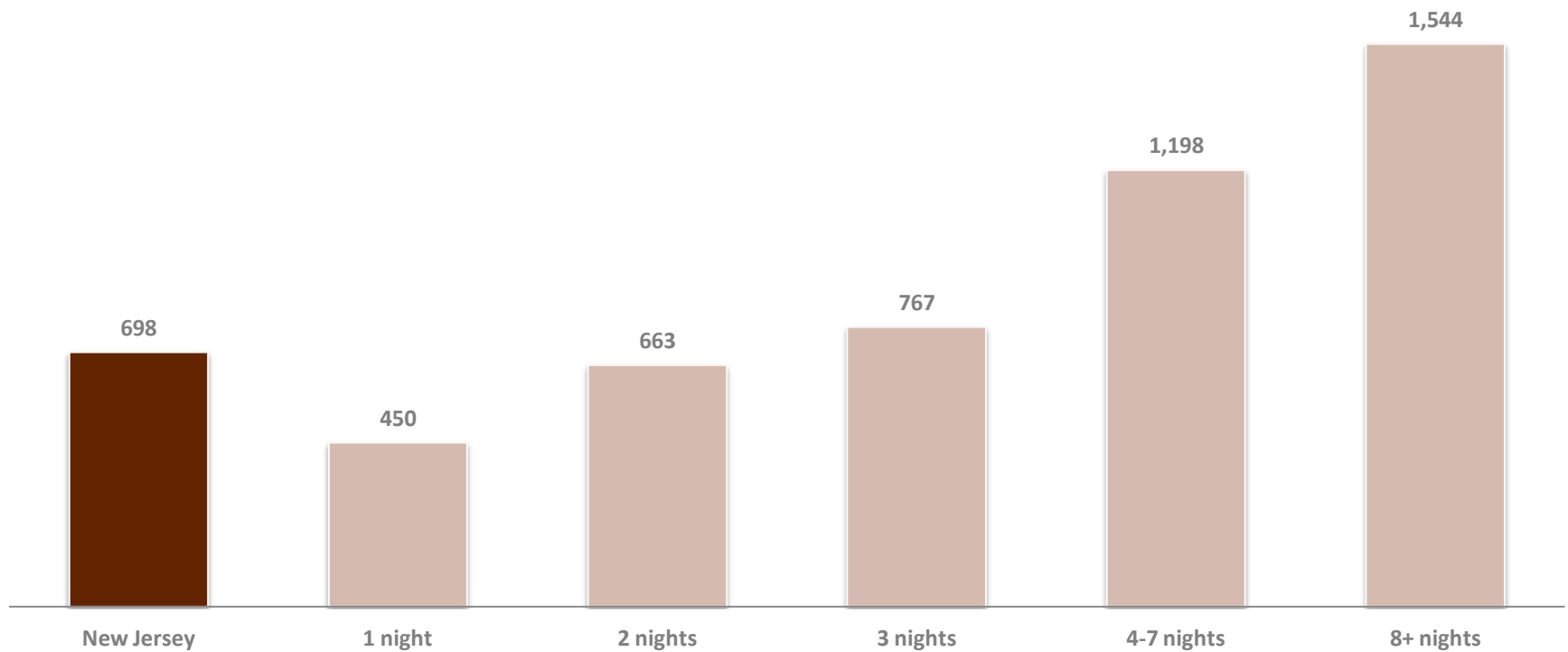


Chart 45 • Segment: 2010-2012 Overnight Leisure Stays (\$) • New Jersey N = 3,683 household count

# New Jersey Stay Length Comparison

## TRIP CHARACTERISTICS

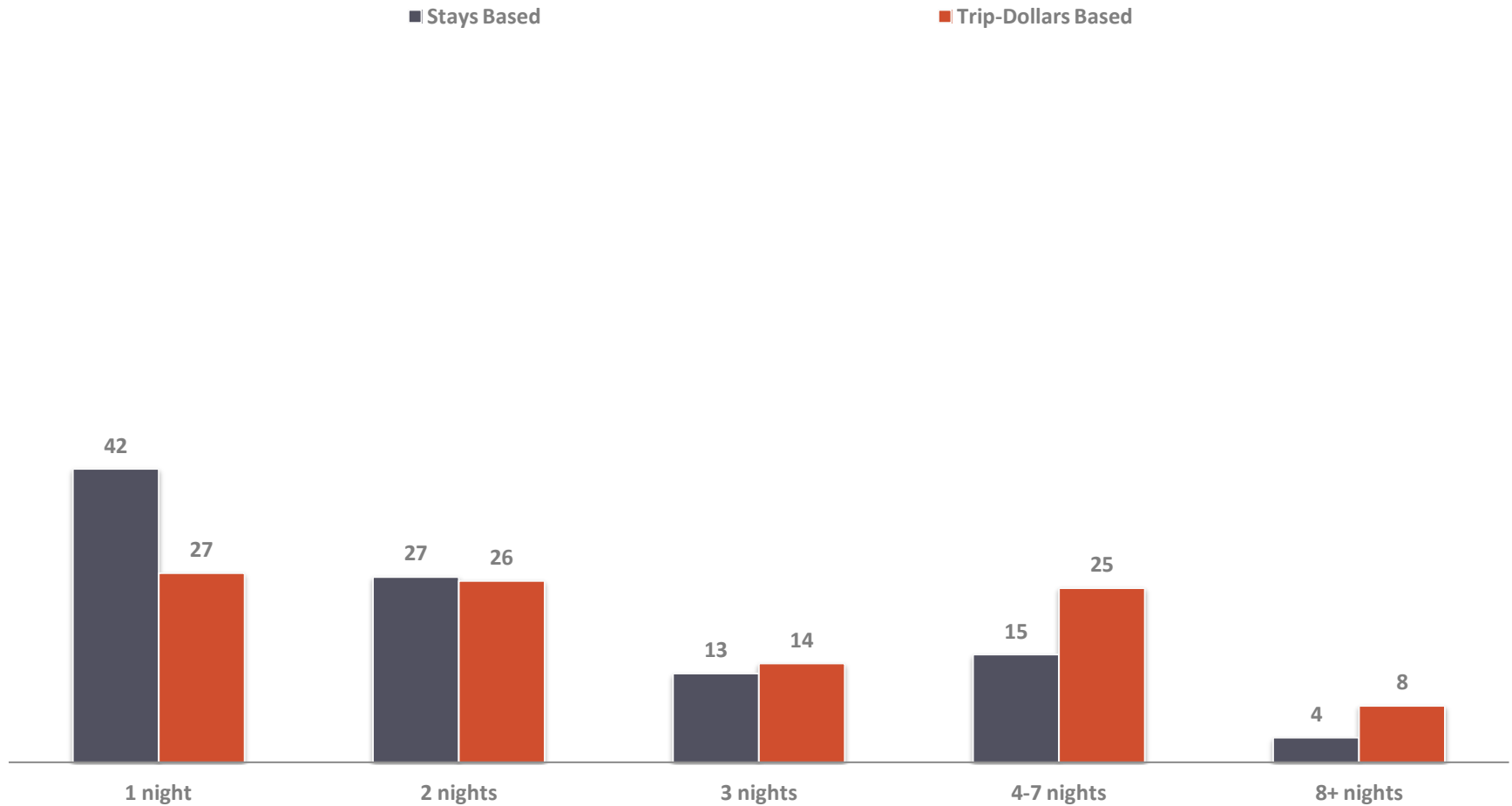


Chart 46 • Segment: 2010-2012 Overnight Leisure (%) • New Jersey N = 4,004 household count



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

TRIP CHARACTERISTICS

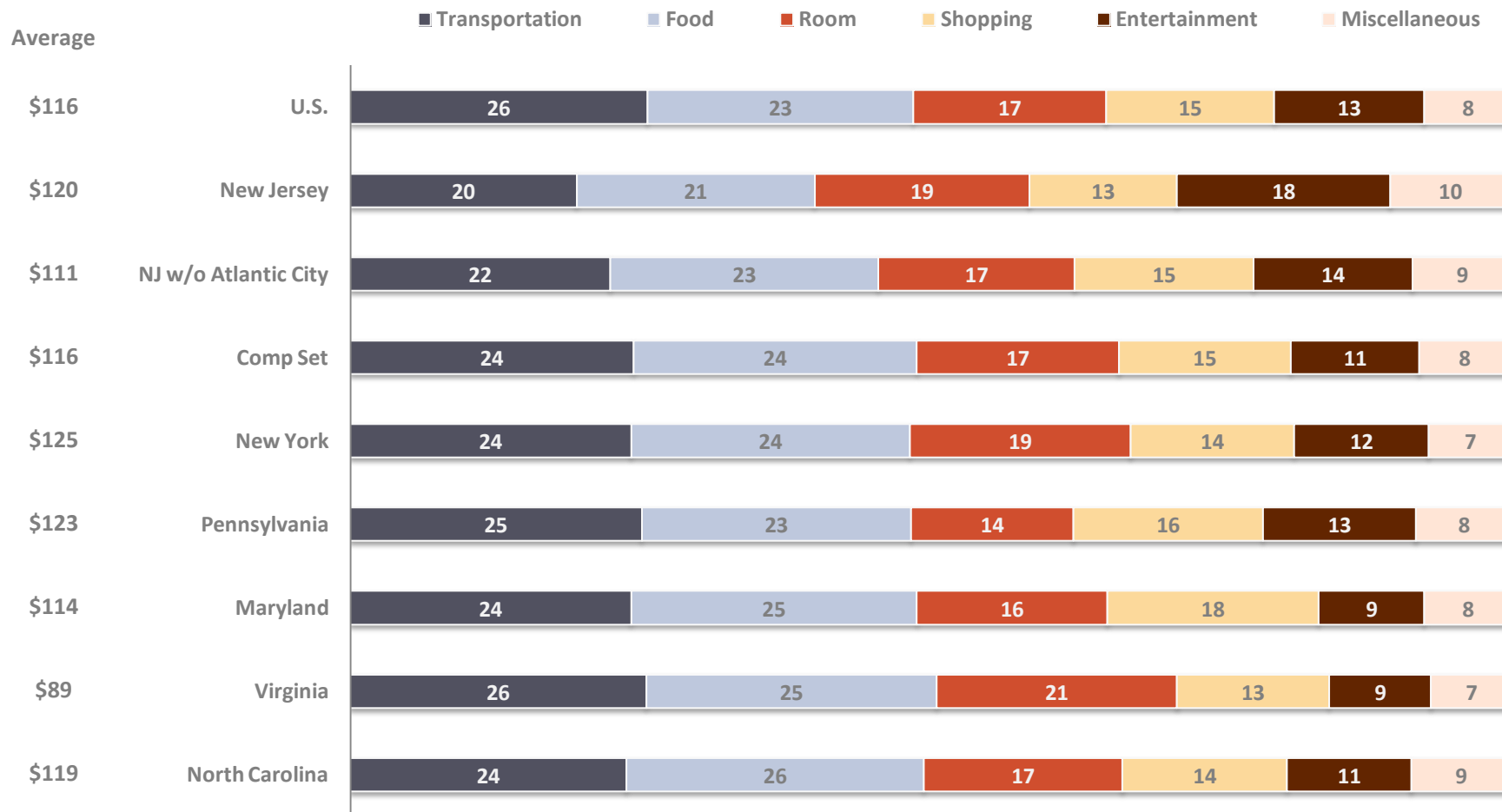


Chart 47 • Segment: 2012 Overnight Leisure Person-Days (%) • New Jersey N = 1,075 household count

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

TRIP CHARACTERISTICS

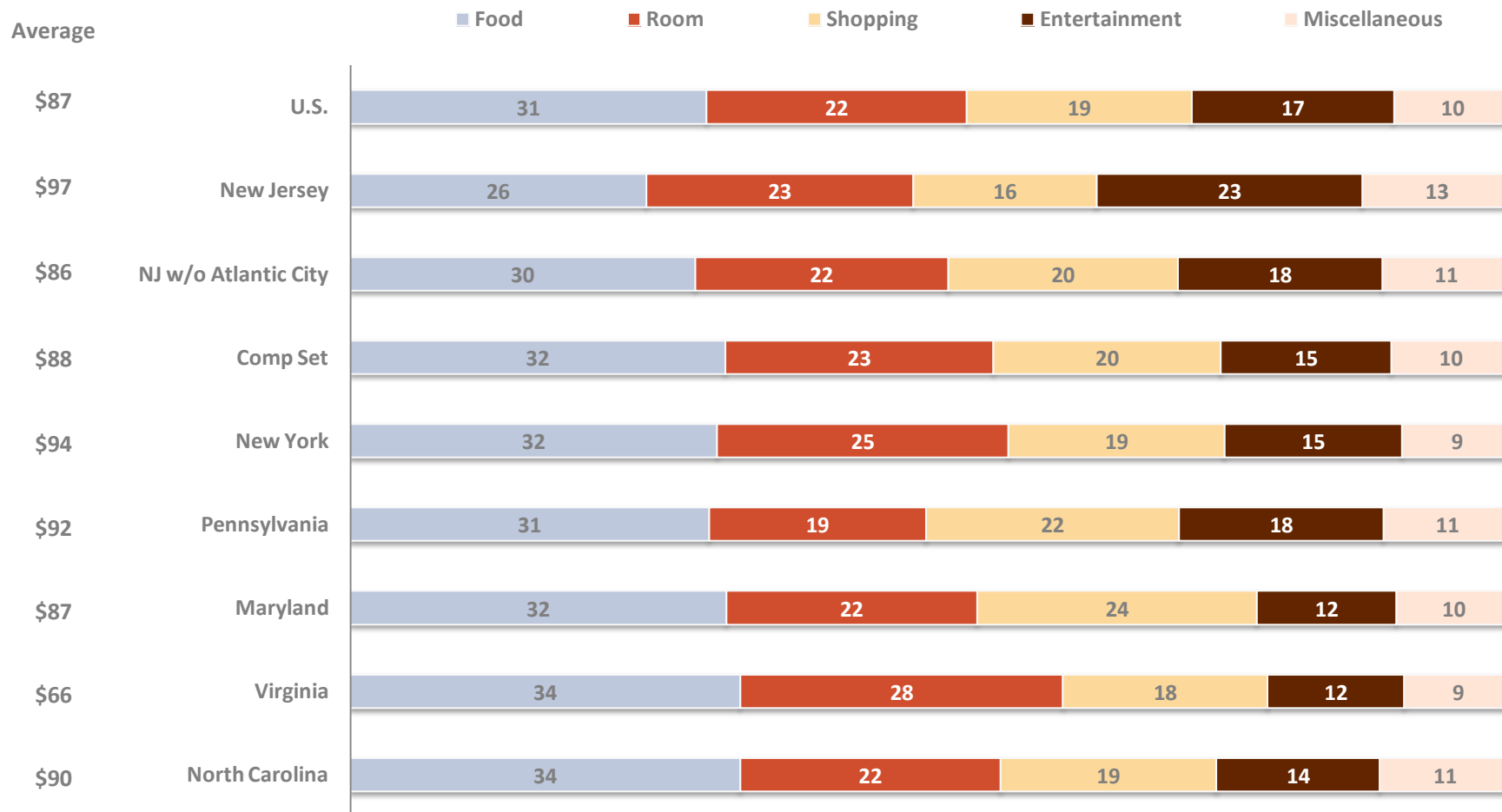


Chart 48 • Segment: 2012 Overnight Leisure Person-Days (%) • New Jersey N = 1,075 household count

# 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
<b>Beach/Waterfront</b>	21%	40%	39%	17%	11%	5%	40%	20%	25%
<b>Culinary/Dining Experience*</b>	31%	38%	33%	30%	31%	24%	34%	30%	31%
<b>Gambling (cards, horses, etc.)</b>	9%	37%	6%	4%	4%	6%	4%	1%	4%
<b>Shopping*</b>	30%	30%	30%	27%	27%	25%	33%	25%	30%
<b>Visit Friends/Relatives (general visit)*</b>	33%	27%	40%	36%	38%	34%	38%	34%	34%
<b>Concerts/Theatre/Dance etc.</b>	13%	17%	12%	13%	18%	11%	10%	11%	10%
<b>Nightlife (bar, nightclub, etc.)</b>	11%	17%	8%	9%	14%	7%	16%	6%	7%
<b>Touring/Sightseeing</b>	18%	11%	12%	17%	21%	18%	14%	16%	15%
<b>Parks (national/state, etc.)</b>	14%	7%	10%	15%	18%	14%	12%	11%	14%
<b>Movies*</b>	7%	7%	8%	7%	7%	6%	7%	6%	7%
<b>Other*</b>	8%	7%	7%	9%	8%	10%	10%	10%	10%
<b>Theme/Amusement/Water Parks</b>	8%	7%	10%	5%	2%	10%	6%	8%	4%
<b>Holiday Celebration (Thanksgiving, July 4th etc.)*</b>	7%	6%	8%	8%	10%	7%	8%	6%	8%
<b>Wedding*</b>	3%	6%	9%	3%	4%	4%	3%	3%	3%
<b>Historic Sites</b>	12%	5%	9%	15%	14%	17%	14%	15%	13%
<b>Biking*</b>	3%	5%	7%	3%	2%	4%	5%	4%	4%
<b>Museums, Art Exhibits etc.</b>	10%	5%	7%	12%	16%	11%	12%	9%	9%
<b>Wildlife Viewing (birds, whales, etc.)*</b>	6%	4%	5%	5%	3%	3%	7%	5%	7%
<b>Water Sports*</b>	4%	4%	5%	4%	2%	3%	6%	3%	5%
<b>Reunion/Graduation*</b>	4%	4%	5%	4%	5%	5%	5%	4%	4%

Chart 49 • Segment: 2012 Overnight Leisure Person-Stays (%) • New Jersey N = 1,125 household count

### GLOSSARY

\* Began in 2011

# 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
<b>Spa*</b>	2%	4%	0%	1%	1%	1%	1%	1%	2%
<b>Hiking*</b>	7%	3%	5%	7%	6%	7%	4%	8%	8%
<b>Festivals/Fairs (state, craft, etc.)</b>	6%	3%	5%	6%	7%	6%	8%	5%	6%
<b>Zoo/Aquarium*</b>	5%	3%	5%	4%	3%	3%	6%	4%	4%
<b>Boating/Sailing</b>	4%	3%	4%	4%	4%	1%	7%	5%	5%
<b>Winery/Distillery/Brewery Tours*</b>	3%	2%	4%	2%	3%	2%	1%	3%	3%
<b>Fishing*</b>	5%	2%	4%	4%	3%	2%	7%	5%	7%
<b>Golf</b>	3%	2%	2%	3%	2%	2%	3%	3%	4%
<b>Amateur Sports (attend/participate)*</b>	3%	2%	4%	3%	2%	4%	2%	4%	5%
<b>Religious/Faith Based Conference*</b>	2%	1%	2%	2%	2%	2%	1%	1%	3%
<b>Camping</b>	4%	1%	2%	4%	6%	4%	2%	5%	3%
<b>Professional Sports Event*</b>	2%	1%	1%	2%	3%	4%	3%	0%	2%
<b>Funeral/Memorial*</b>	2%	1%	2%	3%	3%	2%	2%	2%	3%
<b>Tennis*</b>	1%	1%	2%	1%	1%	1%	0%	1%	1%
<b>Medical/Health/Doctor Visit*</b>	2%	1%	2%	2%	2%	1%	1%	2%	2%
<b>Snow/Winter Sports</b>	1%	1%	1%	1%	1%	3%	1%	0%	1%
<b>Service/Volunteerism/Charity*</b>	1%	1%	1%	1%	1%	1%	1%	1%	0%
<b>Real Estate (buy/sell)</b>	1%	0%	1%	1%	0%	0%	0%	0%	1%
<b>Extreme/Adventure Sports</b>	1%	0%	1%	1%	0%	0%	0%	1%	2%
<b>Hunting*</b>	1%	0%	0%	1%	0%	1%	0%	0%	1%
<b>Eco/Sustainable Travel*</b>	1%	0%	0%	1%	0%	0%	1%	0%	2%

Chart 50 • Segment: 2012 Overnight Leisure Person-Stays (%) • New Jersey N = 1,125 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.

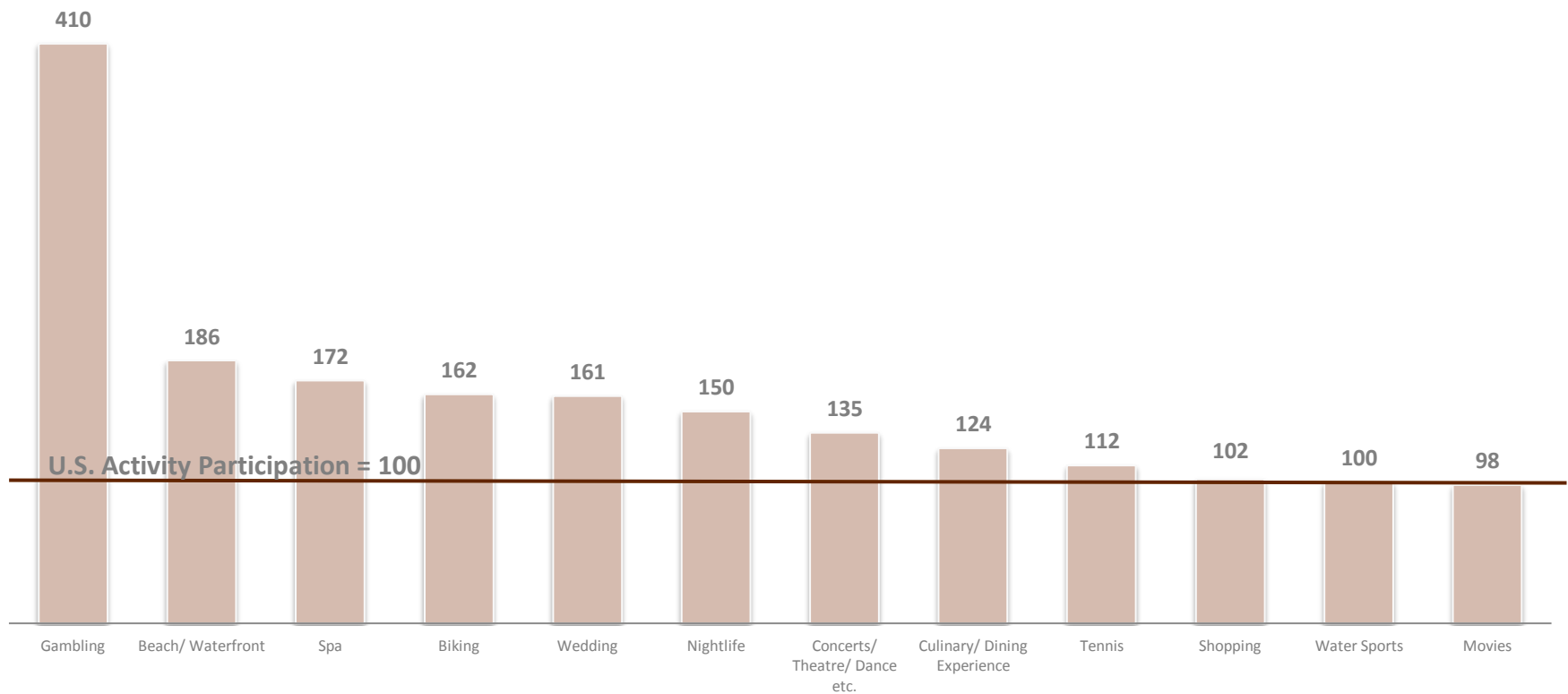


Chart 51 • Segment: 2012 Overnight Leisure Person-Stays • New Jersey N = 1,125 household count

## New Jersey Avg. Party per Trip Spending by Activities

ACTIVITY PARTICIPATION

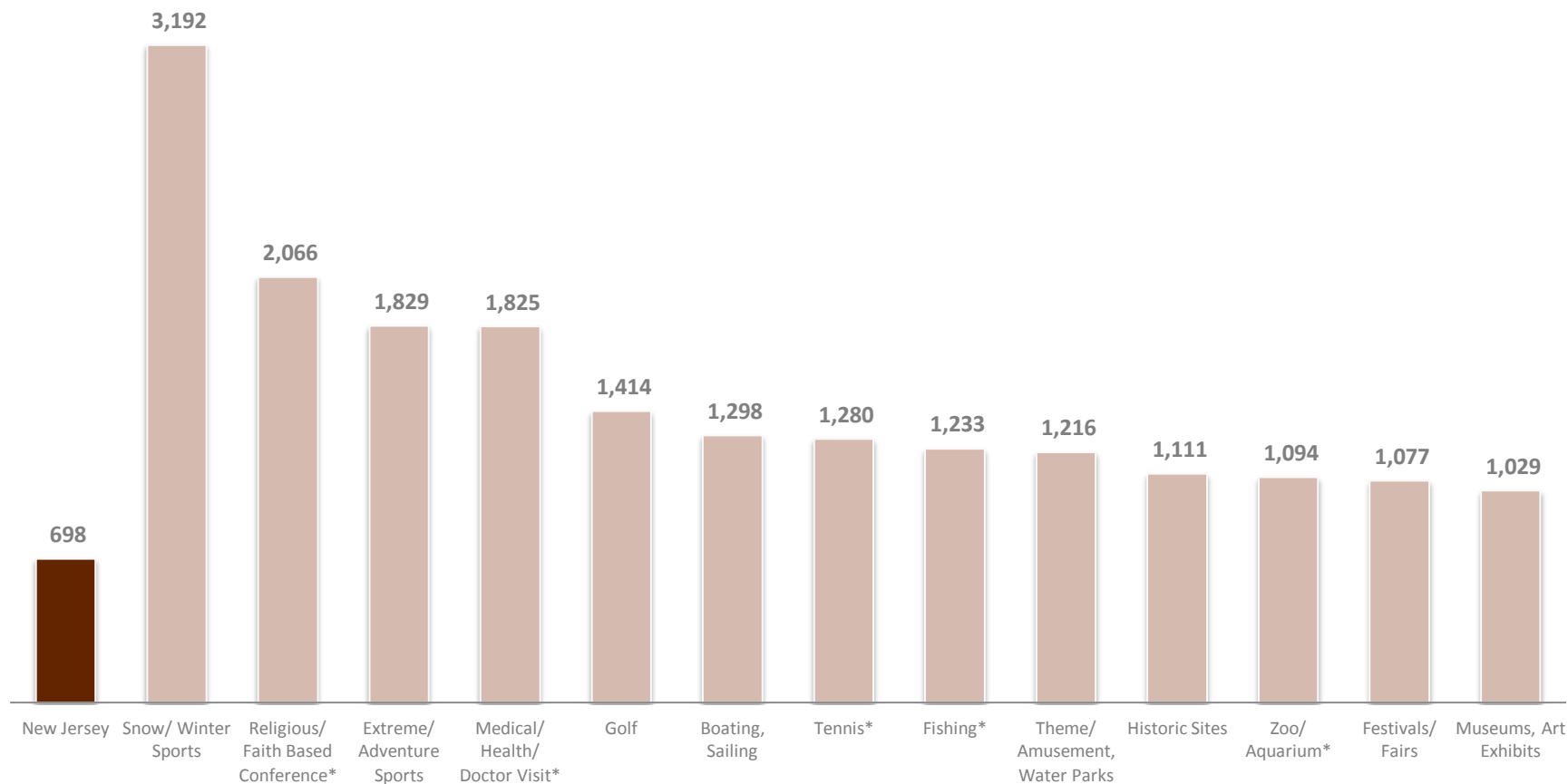


Chart 52 • Segment: 2010-2012 Overnight Leisure Stays (\$) • New Jersey N = 3,683 household count

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

### ACTIVITY PARTICIPATION

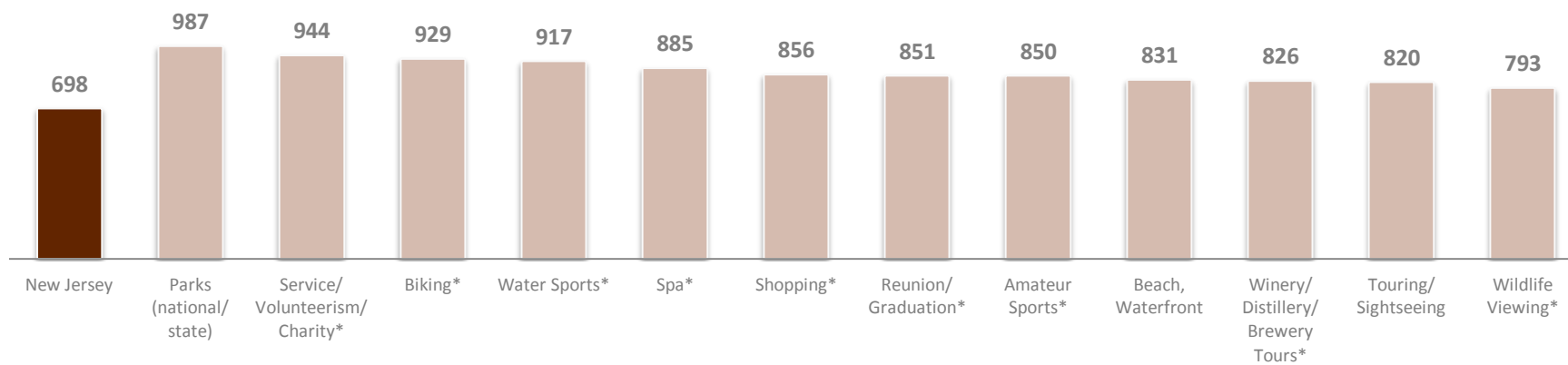


Chart 53 • Segment: 2010-2012 Overnight Leisure Stays (\$) • New Jersey N = 3,683 household count

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

ACTIVITY PARTICIPATION

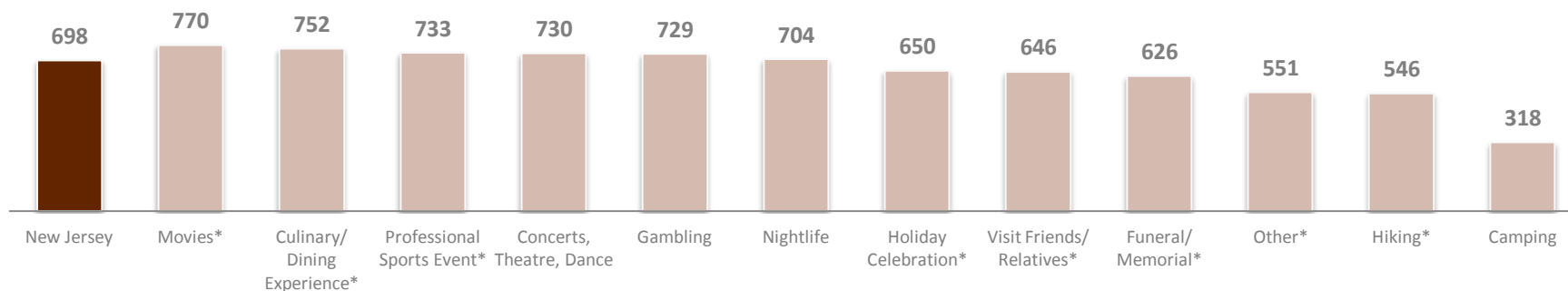


Chart 54 • Segment: 2010-2012 Overnight Leisure Stays (\$) • New Jersey N = 3,683 household count



# New Jersey Activity Comparison

## ACTIVITY PARTICIPATION

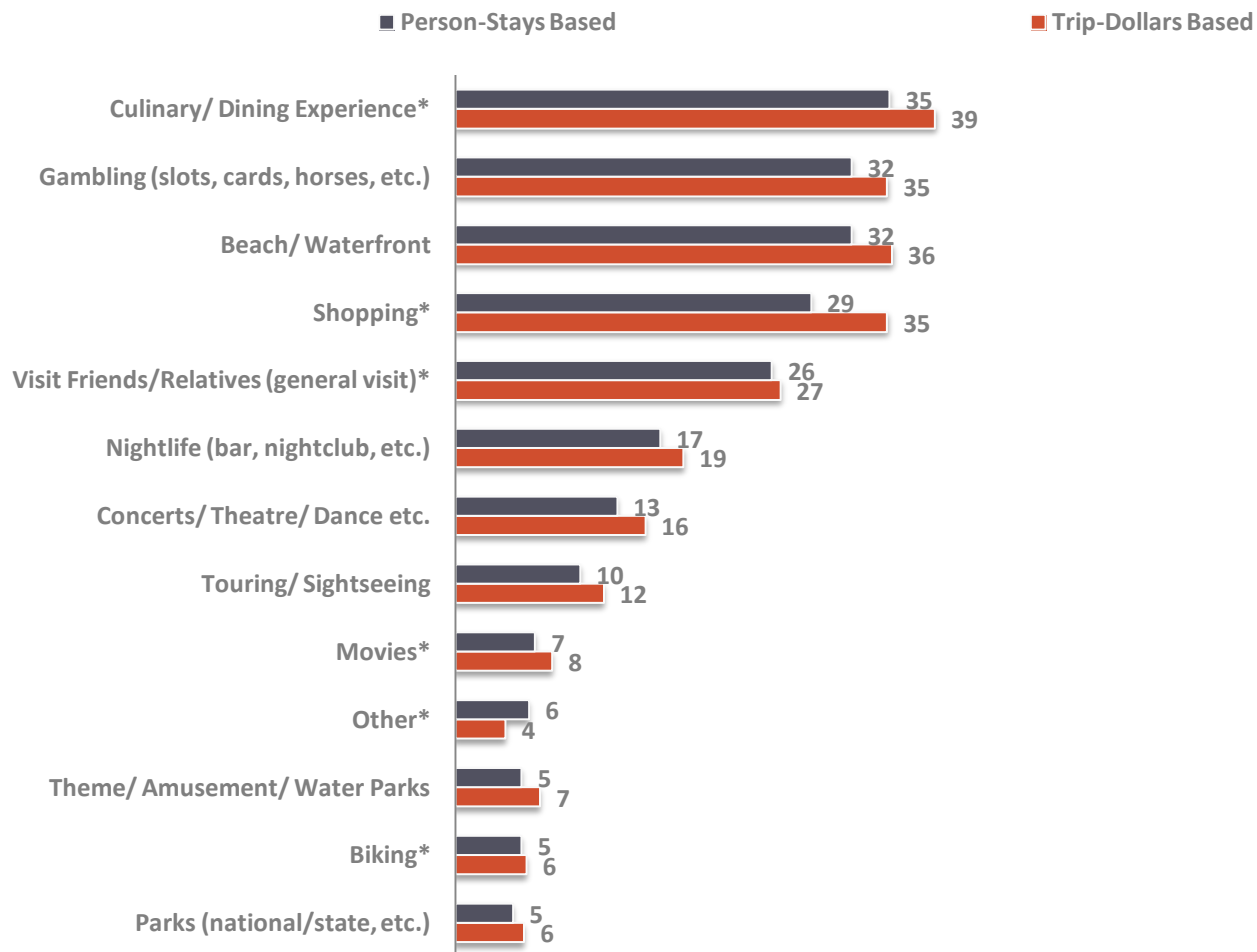


Chart 55 • Segment: 2010-2012 Overnight Leisure (%) • New Jersey N = 4,004 household count

## New Jersey Activity Comparison (cont.)

### ACTIVITY PARTICIPATION

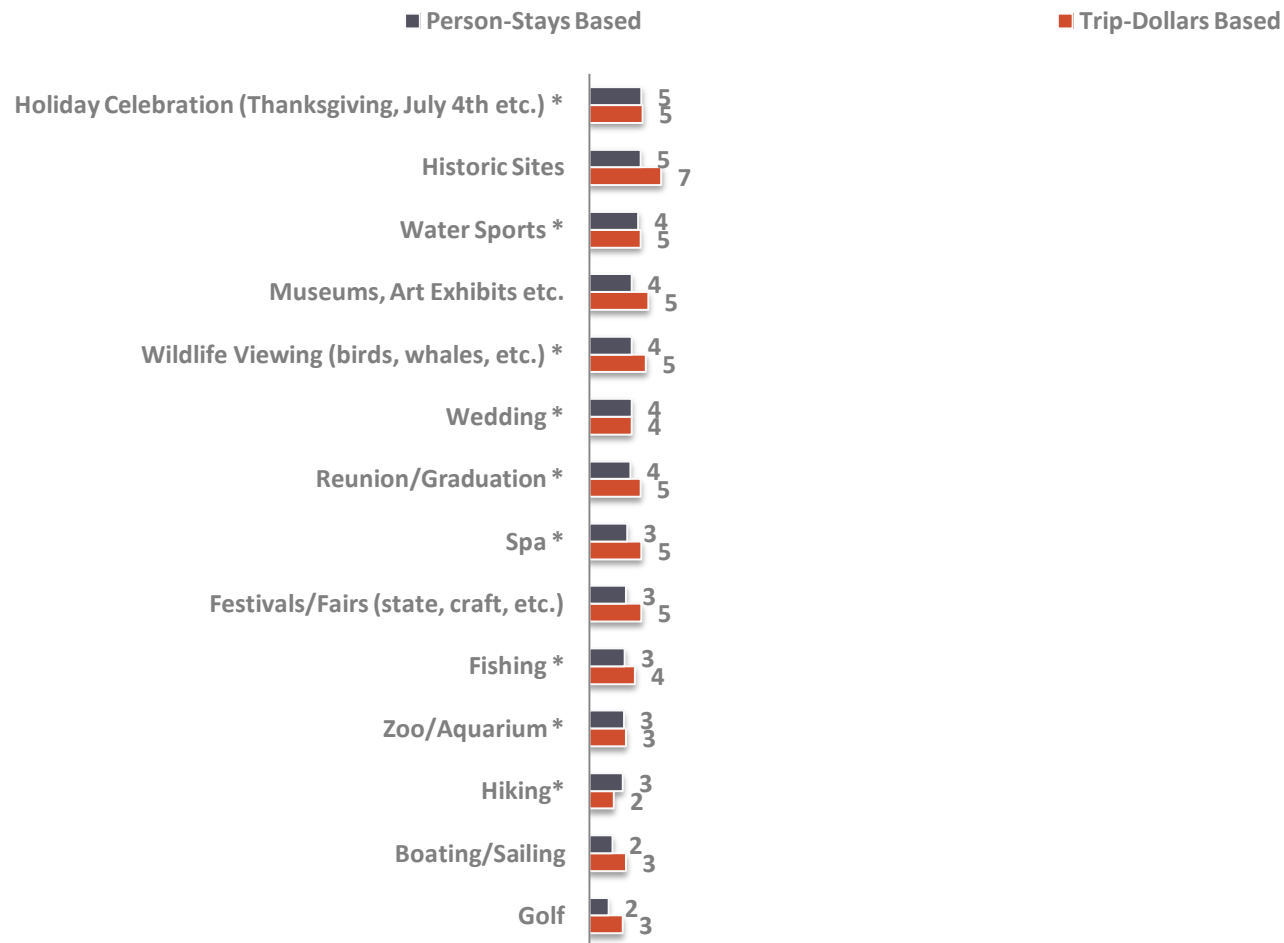


Chart 56 • Segment: 2010-2012 Overnight Leisure (%) • New Jersey N = 4,004 household count

## New Jersey Activity Comparison (cont.)

### ACTIVITY PARTICIPATION

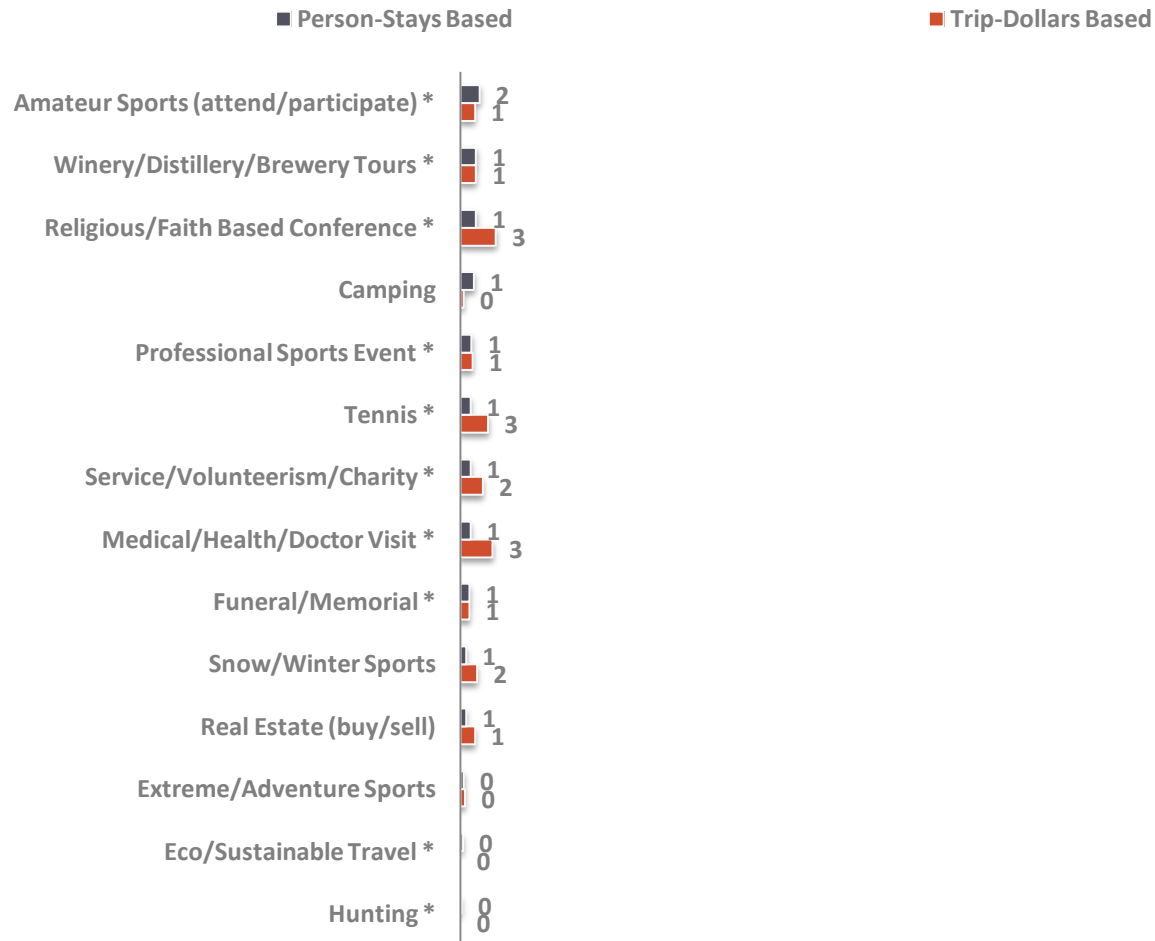


Chart 57 • Segment: 2010-2012 Overnight Leisure (%) • New Jersey N = 4,004 household count

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

ACCOMMODATION

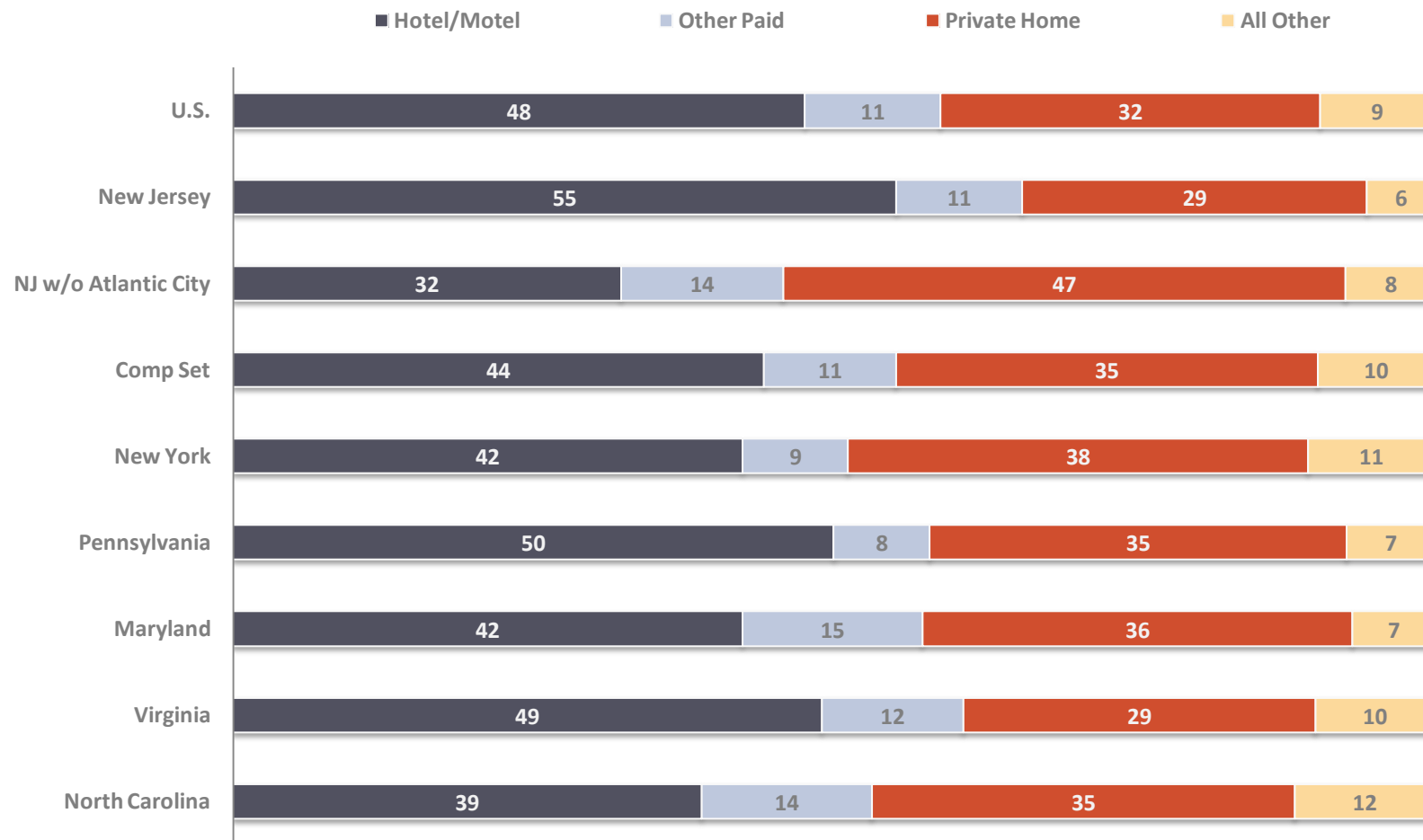


Chart 58 • Segment: 2012 Overnight Leisure Person-Stays (%) • New Jersey N = 1,125 household count

## New Jersey Avg. Party per Trip Spending by Accommodation Type

ACCOMMODATION

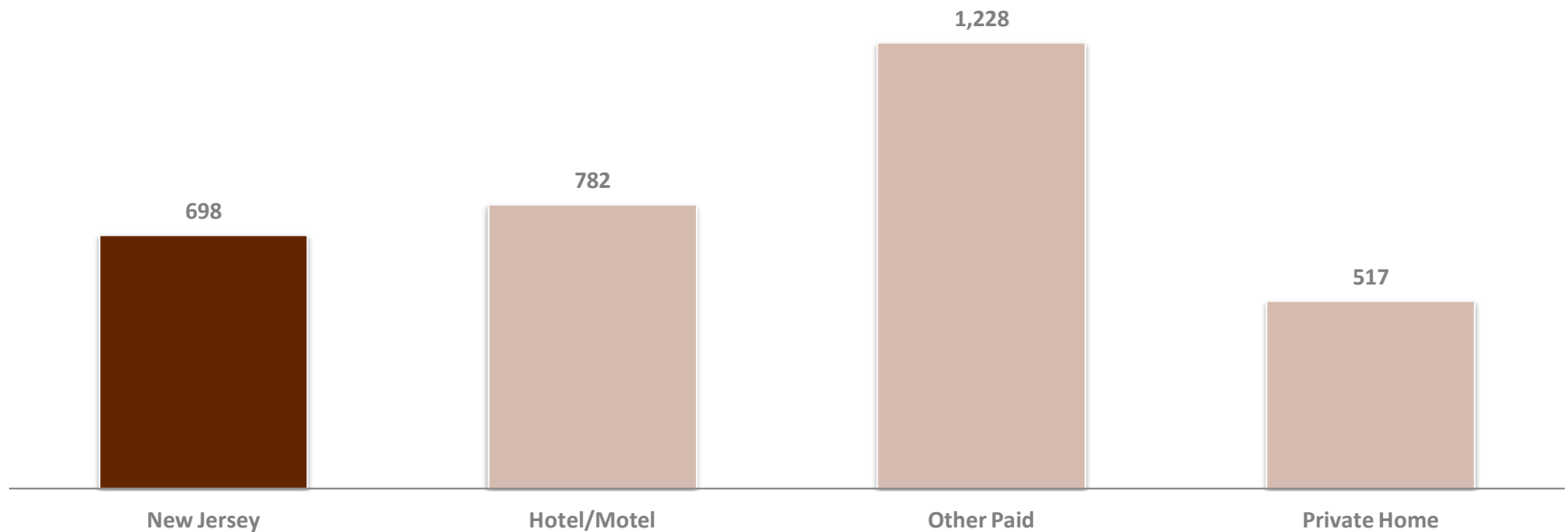


Chart 59 • Segment: 2010-2012 Overnight Leisure Stays (\$) • New Jersey N = 3,683 household count

# New Jersey Accommodation Type Comparison

ACCOMMODATION

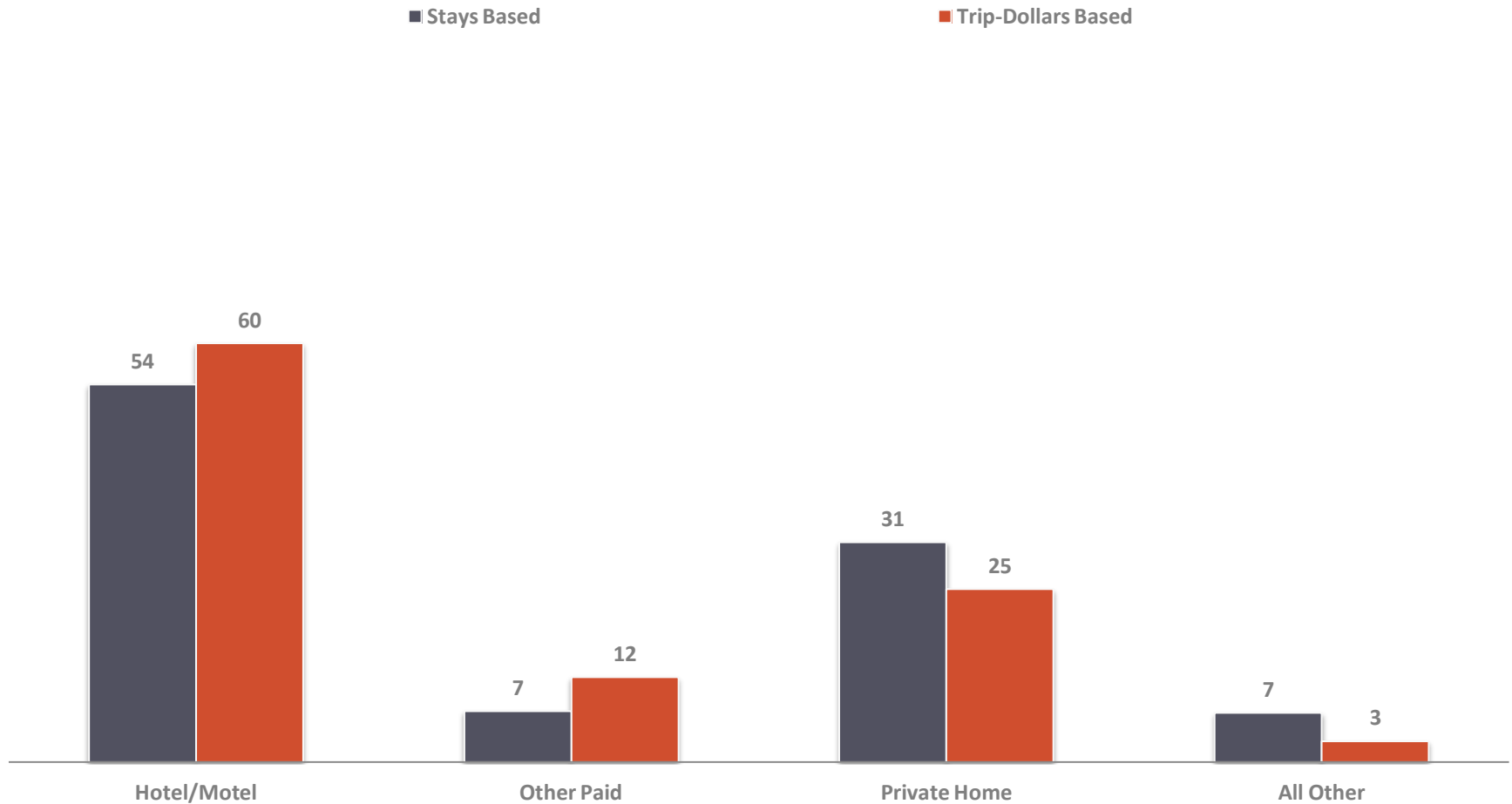


Chart 60 • Segment: 2010-2012 Overnight Leisure (\$) • New Jersey N = 4,004 household count

## 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:

Overnight Leisure Travel	Sample Size for 2012	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.	34,529	0.1%	0.2%	0.2%	0.3%	0.4%
New Jersey	1,125	0.5%	0.9%	1.3%	1.9%	2.4%
NJ w/o Atlantic City	724	0.6%	1.1%	1.6%	2.3%	3.0%
Comp Set	7,004	0.2%	0.4%	0.5%	0.7%	1.0%
New York	2,463	0.3%	0.6%	0.8%	1.2%	1.6%
Pennsylvania	1,806	0.4%	0.7%	1.0%	1.5%	1.9%
Maryland	805	0.6%	1.1%	1.5%	2.2%	2.9%
Virginia	1,209	0.5%	0.9%	1.2%	1.8%	2.4%
North Carolina	1,428	0.4%	0.8%	1.1%	1.6%	2.2%

Example:

If the car travel finding for the U.S. is 79% and the sample size is 34,529, using the chart, we can say that at the 90% level of confidence the proportion ranges between 78.8% and 79.2%.

## 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/Monitor<sup>SM</sup>** 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 data are collected using an online methodology employing KnowledgePanel®, an address based sample panel offered by Knowledge Networks. 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, Ethnicity/race and return rates. The Knowledge Networks sample is used to create benchmark weights which are applied to surveys returned from other managed panels used by DKSA.

Both traveling and non-traveling households are surveyed each month enabling DKSA to generate the best estimate of travel incidence (volume) within the total U.S. population. Among those who have traveled (overnight in the past three months, and daytrips in the past month) 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 either an overnight trip defined as going *someplace, staying overnight and then returning home* or as a day trip defined as *a place away from home and back in the same day*. Respondents report travel behavior for each stay of each trip; 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 stay and activities, expenditures, mode of transportation, 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 ensure 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.

Extensive coding lists are updated regularly to ensure that all data is recorded accurately. DKSA's Quality control committee conducts bi-monthly meetings to review survey results and examine methods to maintain and improve quality control.

### About DKSA

D.K. Shifflet & Associates Ltd. is the leading U.S. consumer travel research firm. DKSA is located in McLean, VA and has, since 1982, provided the industry's most complete consumer based travel data on U.S. residents and their travel worldwide. Our clients include destination marketing organizations, theme parks, credit cards, auto clubs, hotel chains and more.