



D.K. Shifflet & Associates Ltd.

Excellence in Travel Intelligence®

2013 NEW JERSEY OVERNIGHT LEISURE VISITOR PROFILE

Editorial

Summary

Charts & Graphs

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Fiscal Year 2013 Visitor Profile

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

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This New Jersey **Overnight Leisure Visitor Profile** provides intelligence on U.S. and New Jersey travel trends from Fiscal Year 2013. 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 typically attracting about one-third of all visitors to the State. Although the state should be considered as a whole, Atlantic City's unique

*In 2013 New Jersey hosted a total...
86.2 Million visitors spending...
\$18.4 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 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 2013 New Jersey Overnight Leisure Visitor Profile is based on a sample of 1,110 traveling households. Data are based on a fiscal year comprised of fourth quarter 2012 through third quarter 2013. DKSA finalizes, and makes all quarterly data adjustments, after data collection for the fourth quarter of the year. Therefore fiscal year 2013 data is considered 'preliminary' meaning that it is subject to year end 2013 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.

Prior to the recession, national growth in visitation had been fairly consistent at around 3% year over year. Spending was growing at a greater rate, but was also fairly consistent. During the recession visitation declined marginally while spending took a much grater hit. The turn around came in 2010 when annual increases were more than double those prior to the recession. By 2011 both visitation and spending had exceeded 2007 record levels. In 2013 year over year growth in visitation slowed to pre-

recession levels, while the year over year increase in spending is still growing at a faster rate than before the recession. This pattern is similar for both Total and Overnight Leisure travel. New Jersey mirrors the U.S. pattern, however in 2013 both visitation and the associated spending grew at slower rates than the average U.S. destination. Looking at total growth since 2008 however, New Jersey has exceeded the U.S. in visitor growth, but not in spending.

Despite increases in visitation, New Jersey's market share did not increase as compared to the competition. This is likely due to additional visitation New Jersey may have lost to its competitors due to Hurricane Sandy in the Fall of 2012.

New Jersey Fiscal Year 2013 Highlights:

- Record high visitation and spending in 2013
- Substantially slower, but continued growth in Overnight Leisure Visitor Volume and Spending
- Growth slower in visitation; higher in spending than Competitive Set
- Most visitor and spending gains in non-Atlantic City Regions
- Pennsylvania tops New Jersey as primary Origin state for travel to New Jersey
- Shore and Delaware regions gain share of New Jersey travel
- Non-Atlantic City regions gain Excellent Destination Satisfaction; hold steady on Value ratings
- Gaming regains its position as top activity

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 2013 in New Jersey.

Timeframe: Fiscal Year 2013 (Q4 2012 – Q3 2013)

Executive Summary

The characteristics of Overnight Leisure visitors to New Jersey are very different depending on whether or not Atlantic City is included in the Analysis. Visitors to the Atlantic City region, which hosts about 40% of the State's visitors, tend to be older, retired, visit for short getaways, stay in hotels or other paid accommodations, and are 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, visit Friends and Relatives, 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 2013 is the shift in the share of regional visitation. The three most popular travel regions, Greater Atlantic City, Southern Shore and Gateway all experienced declines in their shares of visitation, while two of the traditionally less visited regions, Shore and Delaware River experienced increases. Thus the characteristics of visitors to the non-Atlantic City regions have a greater impact on the State as a whole.

Another change is in the ranking of traveler origin states. Typically the state providing the largest share of visitors to a state is the State itself. This has traditionally been the case for New Jersey as well. In 2013, however, Pennsylvania took over this honor, which may be contributing to the shifts in regional visitation.

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. After two years of identical rankings (Beach/Waterfront, Culinary/Dining Experience and Gambling), the top three activities for the State shifted. Gambling once again took the top spot followed by Beach/Waterfront and Shopping; Culinary/Dining Experience dropped to number four. If Atlantic City visitors are excluded from the analysis, gambling ranks only 13th, three spots below where it was in 2012. It should be noted that Visiting Friends and Relatives, Beach/Waterfront, Shopping and Culinary/Dining Experience may be in a different rank order, but all appear in the top 5 for the entire State and for the Non-Atlantic City regions separately.

Average destination Satisfaction and Value ratings for the State remain high (8.3 and 8.0 respectively on a 10-point scale), and unchanged over 2012. For both dimensions, the State is rated similarly regardless of whether or not Atlantic City is included in the analysis. Excellent (8-10) ratings, however indicate decreases in satisfaction among non-Atlantic City regions and increases in Value for the State as a whole. Many variables can impact perceived satisfaction and value including changes in pricing or changes in the perceived quality or availability of the product. Hurricane Sandy likely played a role in the 2013 shifts with visitors perhaps making changes to the New Jersey destinations they visited in 2012/2013.

In summary, despite significant challenges in 2013, New Jersey continued to see growth in visitation and spending. It also saw a shift in the destinations visited within the State, resulting in shifts to key traveler characteristics. These shifts may be temporary due to the impact of Hurricane Sandy. Thus, they should be watched to see if they persist into 2014 before making major changes to marketing plans.

Visitor Volume and Spending

In Fiscal Year 2013 New Jersey hosted just over 86 million visitors, spending approximately 18.4 billion dollars — another all time high for both visitors and spending in the State. These figures may have been even higher if it were not for the devastation caused by Hurricane Sandy in October of 2012. This very likely contributed to the slowing growth.

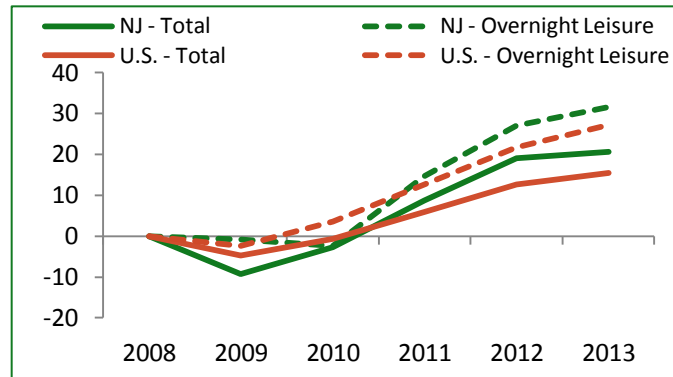
Although the State continued to experience growth in Total visitor volume and associated spending, it was at a slightly slower rate than the average U.S. destination. Despite this slow growth year, New Jersey has experienced more growth in both Total and Overnight Leisure visitors since 2008 than has the average U.S. destination during the same time period.

This is not the case for spending. For the past several years spending in the average U.S. destination has grown at a faster rate than it has in New Jersey. This is primarily due to the much larger than average growth in Day Trips to the State. This trend may be changing, however, as the number of less valuable Day Trips taken in 2013 did not increase over those taken in 2012.

The entire country felt the impact of the recession. Although slight, it is interesting to note that while New Jersey experienced greater declines in visitation than the average U.S. destination during this time, the impact on spending was very similar. The recovery has been slightly different with New Jersey ahead of the average destination in visitation, but lagging slightly behind in spending — again, likely due to increases in Day Trips.

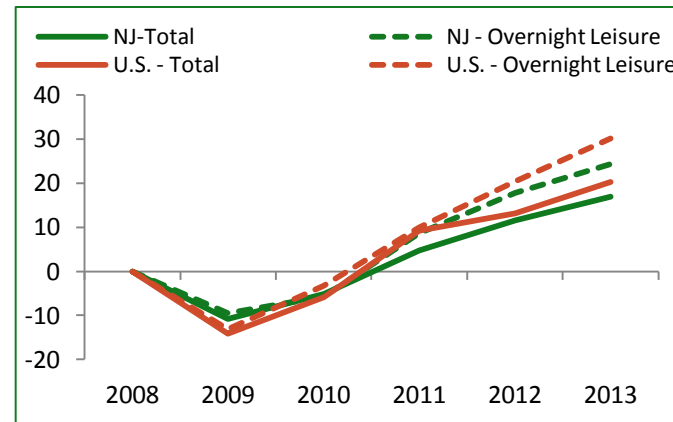
Total

PERSON-STAYS (millions) INDEXED TO 2008



Overnight Leisure

DIRECT SPENDING (billions) INDEXED TO 2008



86.2 Million Visitors — ↑1.4%

37.2 Overnight — ↑3.6%

\$18.4 Billion Dollars — ↑4.8%

\$12.7 Overnight — ↑5.5%

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 2013 quarterly adjustments

Note: Data in these graphs indexed to 2008 — data shows yearly change as compared to 2008 rather than year over year percent change — this depicts a more accurate relationship between the segments

Visitor Volume and Spending

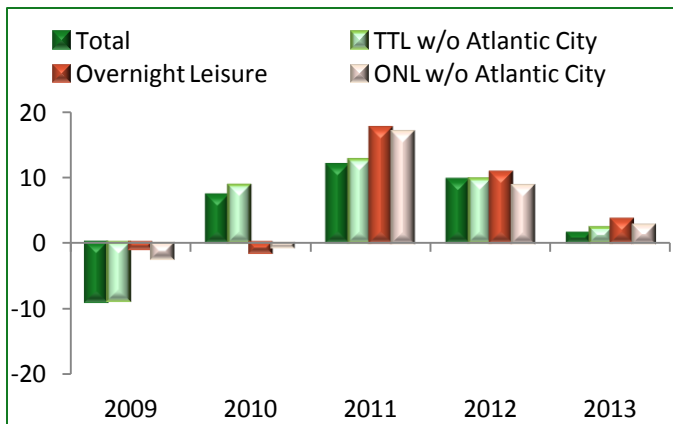
If we look at only what is happening in the State, we see the impact Atlantic City has the number of visitors to the State as well as the money spent by those visitors.

While growth in 2013 is substantially slower than in the previous two years, the pattern is the same. Overall the non-Atlantic City portion of the State continues to drive growth in total visitation, Atlantic City drives growth in Overnight Leisure.

The story is slightly different for spending. For the past several years, the non-Atlantic City portion of the State has accounted for a smaller portion of the spending growth than has Atlantic City. In 2013 this pattern has changed with the balance of the State

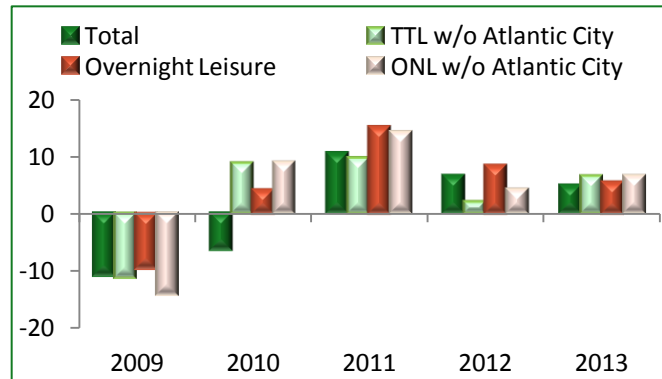
Visitor Volume

PERSON-STAYS (% change)



Visitor Spending

SPENDING (% change)



driving growth in both Total and Overnight Leisure spending.

The good news is the growth in spending is greater than the growth in visitation, which has not been the case over the past few years. This means that those who are coming are spending more. Further, the growth is strongest among those visiting the non-Atlantic City portions of the State. They are still spending less per person than those visiting Atlantic City, but since these folks have traditionally represented about two-thirds of all visitors to New Jersey, their impact is significant.

Those visiting Atlantic City are demographically different from those visiting the balance of the State. The demographics, which will be discussed later, help explain the differences.

Atlantic City driving growth -
Overnight Leisure Visitors

Non-Atlantic City destinations
driving growth —
Overnight Leisure Spending

Visitor Volume and Spending

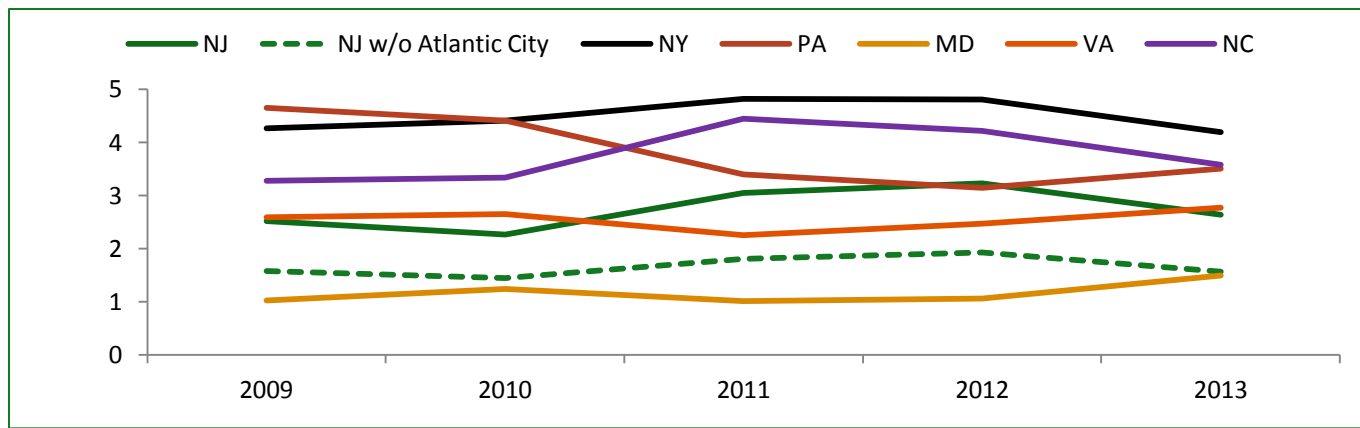
New Jersey's market share has steadily increased since 2010. The State shows a slight decrease in 2013 despite increases in visitation due to other states having experienced larger increases in visitation than has New Jersey.

All New Jersey competitors, excluding Pennsylvania and perhaps Virginia have been pretty much maintaining their relative positions. Although it is pretty much neck and neck in 2013, Virginia may be on a trend that would have it surpass New Jersey in 2014. Pennsylvania is another story, however. In 2009

Pennsylvania enjoyed the top market share position among New Jersey's competitors, even surpassing New York. In 2013 it dropped to the third position behind New York and North Carolina. Over the past few years Pennsylvania has cut its tourism budget significantly. It is likely that the reduction in promotional activities due to budget cuts have had a negative impact on the State's market share. Similar impacts on visitation and the associated spending have been experienced by other states, such as Colorado, when tourism promotion budgets have been cut.

Market Share

OVERNIGHT LEISURE PERSON-STAYS



New Jersey holding its own

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. This is due to the larger number of older generations visiting the State and in particular Atlantic City. Visitors to the non-Atlantic City portion of the State look very similar to those visiting the average U.S. destination or the Competitive Set in both age and generational composition.

It makes sense then, that New Jersey visitors would also be less likely to have children in the household. This is driven by visitors to Atlantic City because those visiting destinations other than Atlantic City are as likely to have children in the household as are

visitors to the average destination and, in particular, the Competitive Set.

For the first time in several years the average income of the New Jersey visitor has dropped below visitors to the average destination as well as those visiting the Competitive Set specifically. This is likely due to the increased number of those visiting destinations other than Atlantic City for overnight trips. These visitors tend to have lower incomes than those visiting Atlantic City, yet they are the group driving the increase in overnight visitation in 2013. Increases in the visits by the GI/Silent generations, particularly to Atlantic City may also be contributing.

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.)	48	46	46	46
Employed	64%	61%	61%	60%
Retired	20%	16%	21%	22%
Average Income (000)	\$83.7	\$83.8	\$89.2	\$95.3
Children in HH	30%	36%	36%	35%
Generations:				
Millennial	19%	23%	26%	25%
GenX	29%	35%	29%	29%
Boomer	39%	31%	34%	36%
Silent/GI	13%	12%	10%	10%

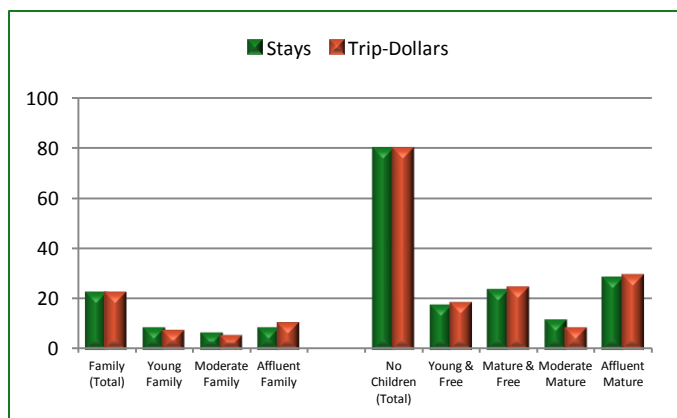
New Jersey Visitors:
Older
Lower Income
Less Likely to have Kids

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 valuable for the State. Driven by the Affluent Family Lifestages, the combined Family Lifestages for the State excluding Atlantic City are the most profitable. Lifestages are much more even in terms of profitability for the State as a whole.

New Jersey

OVERNIGHT LEISURE STAYS (2010-2012)

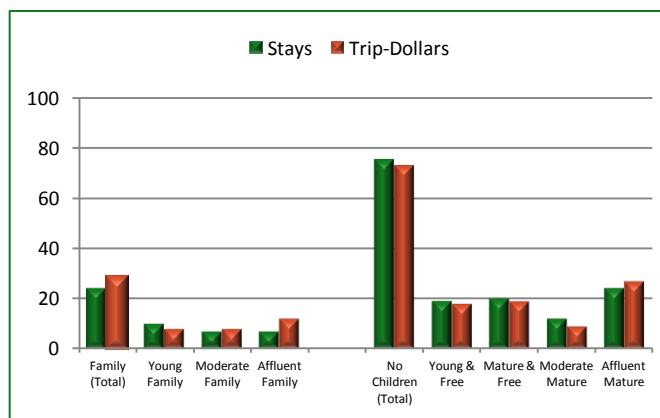


DKSA Lifestage Definitions

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

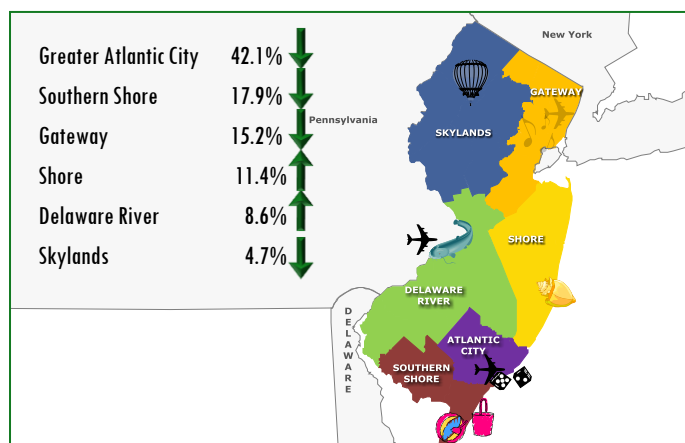
Where do New Jersey's visitors come from?

Almost 9 out of 10 New Jersey visitors come from 7 states with about one quarter coming from New Jersey itself and an additional 49% coming from the neighboring states of New York and Pennsylvania.

It is not surprising then that the majority of travel to New Jersey is by auto and that the average one-way distance traveled is about 220 miles — almost 200 miles less than to the average U.S. destination and about 100 miles less than to New Jersey's competitive set. In 2013 travel by bus almost doubled accounting for 11% of the transportation used to get to New Jersey.

New Jersey Destination Regions

OVERNIGHT LEISURE SHARE OF PERSON-STAYS



New Jersey Origin States

OVERNIGHT LEISURE SHARE OF PERSON-STAYS

Pennsylvania	31.2%
New Jersey	24.1%
New York	17.6%
Virginia	5.1%
Maryland	4.9%
Florida	3.6%
Massachusetts	2.2%
Other	11.3%

Where do New Jersey's visitors go?

Although experiencing a slight decline in 2013, likely due to the impacts of Hurricane Sandy, the Greater Atlantic City Region continues to receive the largest share of New Jersey's Overnight Leisure visitors.

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 to this region drops to less than 2%.

Only the Shore and Delaware River regions gained share of New Jersey travel in 2013.

Over 70% of New Jersey visitors come from the tri-state area

Why do travelers visit New Jersey?

Getaway Weekends continue to be the predominant type of trip for New Jersey's Overnight Leisure visitors in 2013. The reasons for visiting New Jersey, however, vary substantially depending on whether or not Atlantic City is included in the analysis.

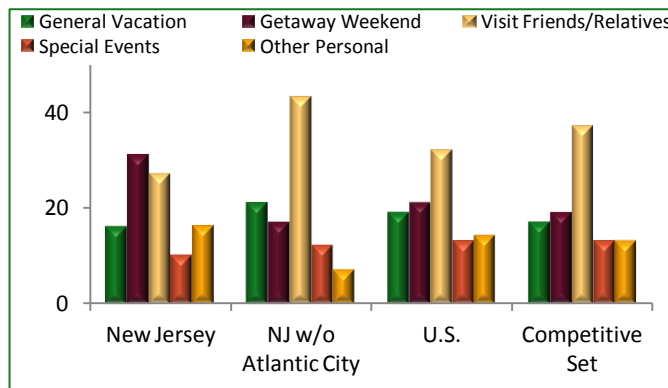
For the State as a whole, the share of Getaway Weekends continues to be almost double that of General Vacations (31% and 16% respectively). In fact, in 2013 travelers were more likely to come to the State to Visit Friends and Relatives (27%) than to take a general vacation.

When Atlantic City is excluded, Getaway Weekends drop substantially and Visiting Friends and Relatives jumps to over 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 more similar to the average U.S. destination and to the Competitive Set.

Atlantic City is driving the average daily spending for the State. In 2013 visitors spent a larger share of their travel dollar on Entertainment than in previous years which may be contributing to the higher daily spend. The average daily spending in the State as a whole is almost 30% higher than when Atlantic City is excluded from the analysis. Again demonstrating the value of the Atlantic City area.

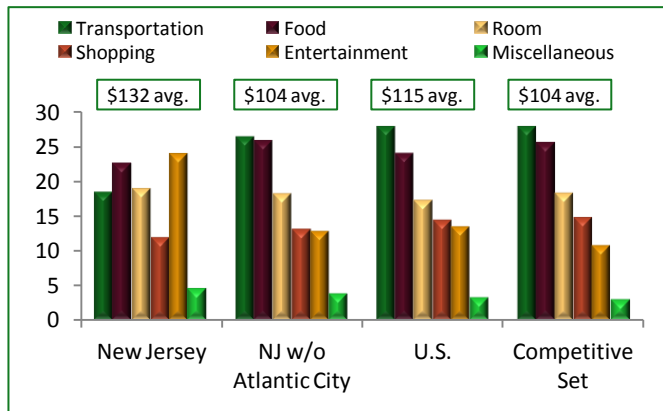
Purpose of Travel

OVERNIGHT LEISURE PERSON-STAYS



Per-Person-Per-Day Spending

OVERNIGHT LEISURE



Atlantic City area drives
Weekend Getaways
And Spending

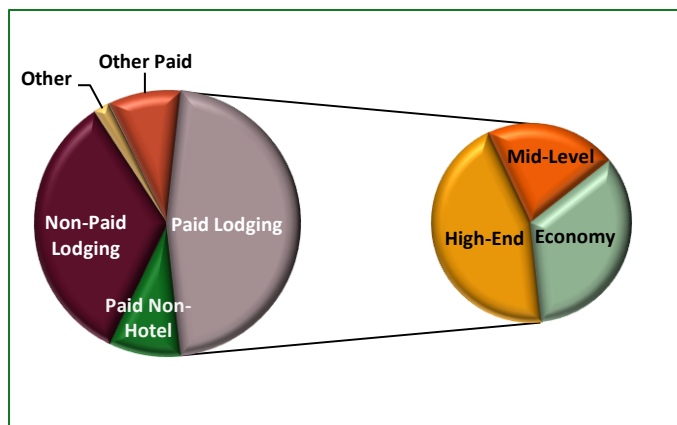
What type of accommodations do they stay in?

More than 3 out of every 5 visitors to New Jersey stay in paid accommodations, which is about 15% *more* than the average destination and about 25% *more* than the Competitive Set. Among those staying in New Jersey's paid accommodations almost 90% stay in hotels.

When Atlantic City is excluded from the analysis the number staying in paid accommodations drops to about 2 out of every 5 visitors, which is about 20% *less* than the average destination and about 15% *less* than the competitive set. The percentage of paid accommodation stayers who stay in hotels drops to 70%.

New Jersey

OVERNIGHT LEISURE PERSON-STAYS

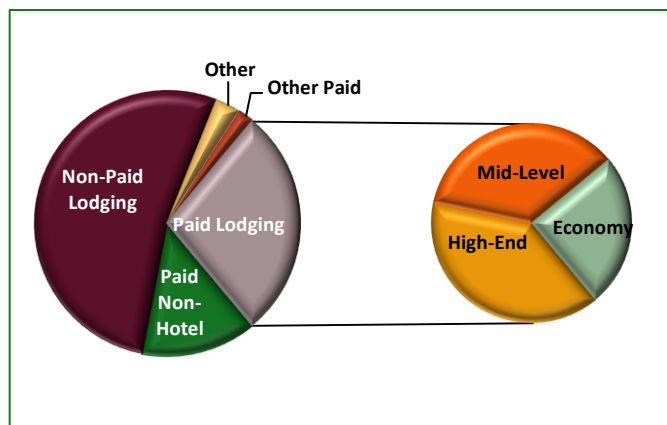


Among those visiting regions excluding Atlantic City, over half are staying with Friends or Relatives. Thus it is clear that the Atlantic City region is driving the large number of hotel stays in the State.

However, those staying in the Atlantic City region spend less per day on lodging than those visiting the average destination, their competitive set or the balance of the State. This is evidenced by the types of hotels they stay in. For the State as a whole, 55% of hotel stayers spend their nights in high-end or mid-level hotels. When Atlantic City is excluded, this percentage jumps to 70%. Thus non-Atlantic City visitors are paying the least for lodging.

New Jersey without Atlantic City

OVERNIGHT LEISURE PERSON-STAYS



Those who stay in hotels, choose High-End and Mid-Level properties

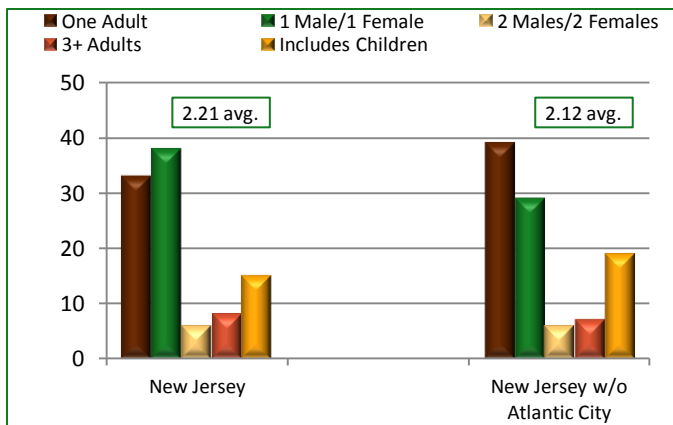
Who do they travel with; how long do they stay?

Travel parties consisting of one adult or couples account for over 70% of the State's Overnight Leisure travel. Surprisingly, the portion of the State excluding Atlantic City accounts for a smaller share of larger travel parties than does the entire state, but is on par with the average U.S. destination as well as the Competitive Set.

As might be expected, the State as a whole shows a smaller share of children in the travel party than when Atlantic City is excluded indicating that travel parties to Atlantic City include very few children.

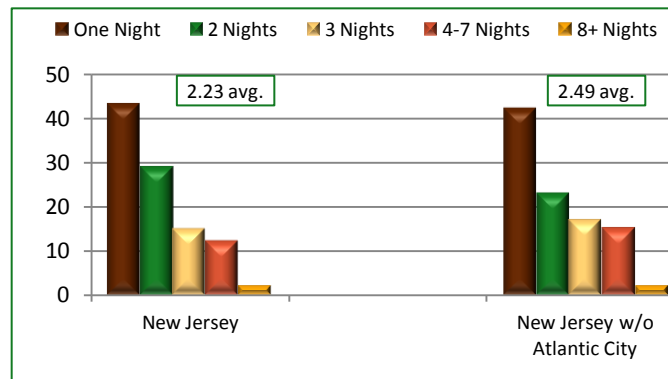
Travel Party Composition

OVERNIGHT LEISURE STAYS



Stay Length

OVERNIGHT LEISURE STAYS – (1+ NIGHTS)



At between 2.1 and 2.2 persons, the average Travel Party size for either New Jersey geography is smaller than either the average U.S. destination or the Competitive Set.

With an average of 2.2 nights, visitors to New Jersey have shorter Overnight Leisure stays than visitors to either the average U.S. destination or to the Competitive Set. This is due to the fewer number of 4+ night stays in the State.

Those visiting the Non-Atlantic City portion of the State have more longer (4+ nights) stays than do visitors to the entire State, but less than either the average U.S. destination or the Competitive Set.

Smaller Travel Parties
Shorter Length of Stay
than other U.S. destinations

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. Gambling (slots, cards, horses, etc.)
2. Beach/Waterfront
3. Shopping
4. Culinary/Dining Experience
5. Visiting Friends and Relatives

After ranking third in 2012, Gambling has once again risen to the top as the most popular activity in New Jersey; pushing Beach/Waterfront to the number two position. Until this year, 2008 was the last time gambling had been the most popular activity in New Jersey and this is the first time since 2006 that the percentage of visitors coming to gamble matched a high of 40%.

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 by Theme/Amusement/Water Parks followed closely by the much less lucrative activities of touring/sightseeing and visiting historic sites.

In fact, tied with Personal Special Event, Water Sports and Festivals/Fairs (state, craft, etc.) gambling ranks only 13th for this portion of the State.

1. Visiting Friends and Relatives
2. Beach/Waterfront
3. Culinary/Dining Experience
4. Shopping
5. Theme/Amusement/Water Parks

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 only exception is Visiting Friends and Relatives which represents a higher level of visitation than it does spending. The most profitable travel parties for the state are those engaging in the activities of beach/waterfront, gambling, culinary/dining, shopping



How do New Jersey visitors rate the State?

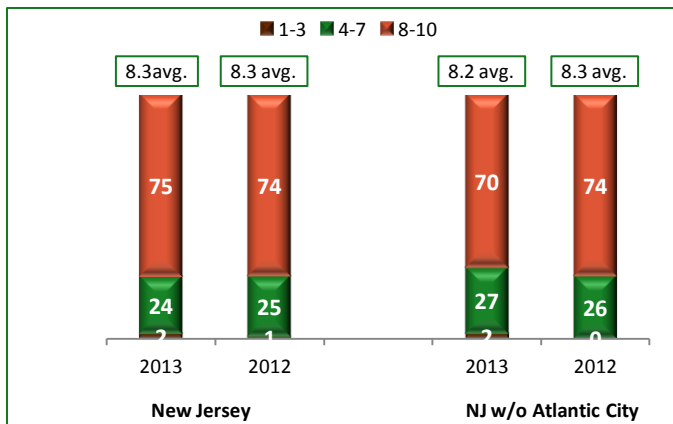
Respondents are asked to rate their overall satisfaction with the destinations they visit as well as the overall value for the money the destination provides. Ratings are on a 10-point scale, where 1 is low or 'poor' and 10 is high or 'excellent'.

New Jersey destinations as well as the competitor's destinations have consistently received a high percentage of Excellent (8-10) ratings for overall satisfaction with the destination. In fact, in 2013 all competitive states achieved average ratings of between 8.7 and 9.1, similar to the average U.S. destination.

Excellent satisfaction ratings for New Jersey stabilized in 2013 after a drop in 2012. Excellent ratings for the non-Atlantic City portion of the state however, dropped in 2013 indicating that Satisfaction for the Atlantic City region has improved.

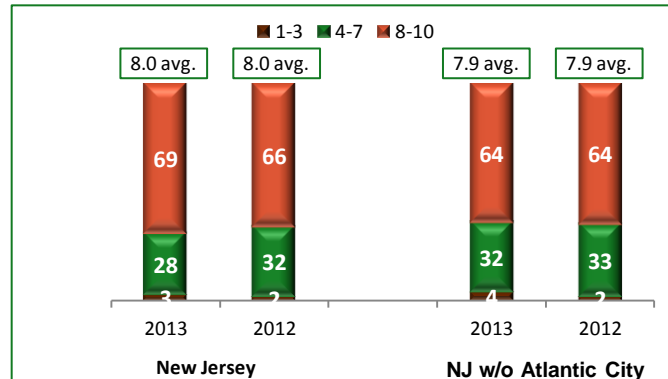
Overall Satisfaction

OVERNIGHT LEISURE PERSON-STAYS



Value for the Money

OVERNIGHT LEISURE PERSON-STAYS



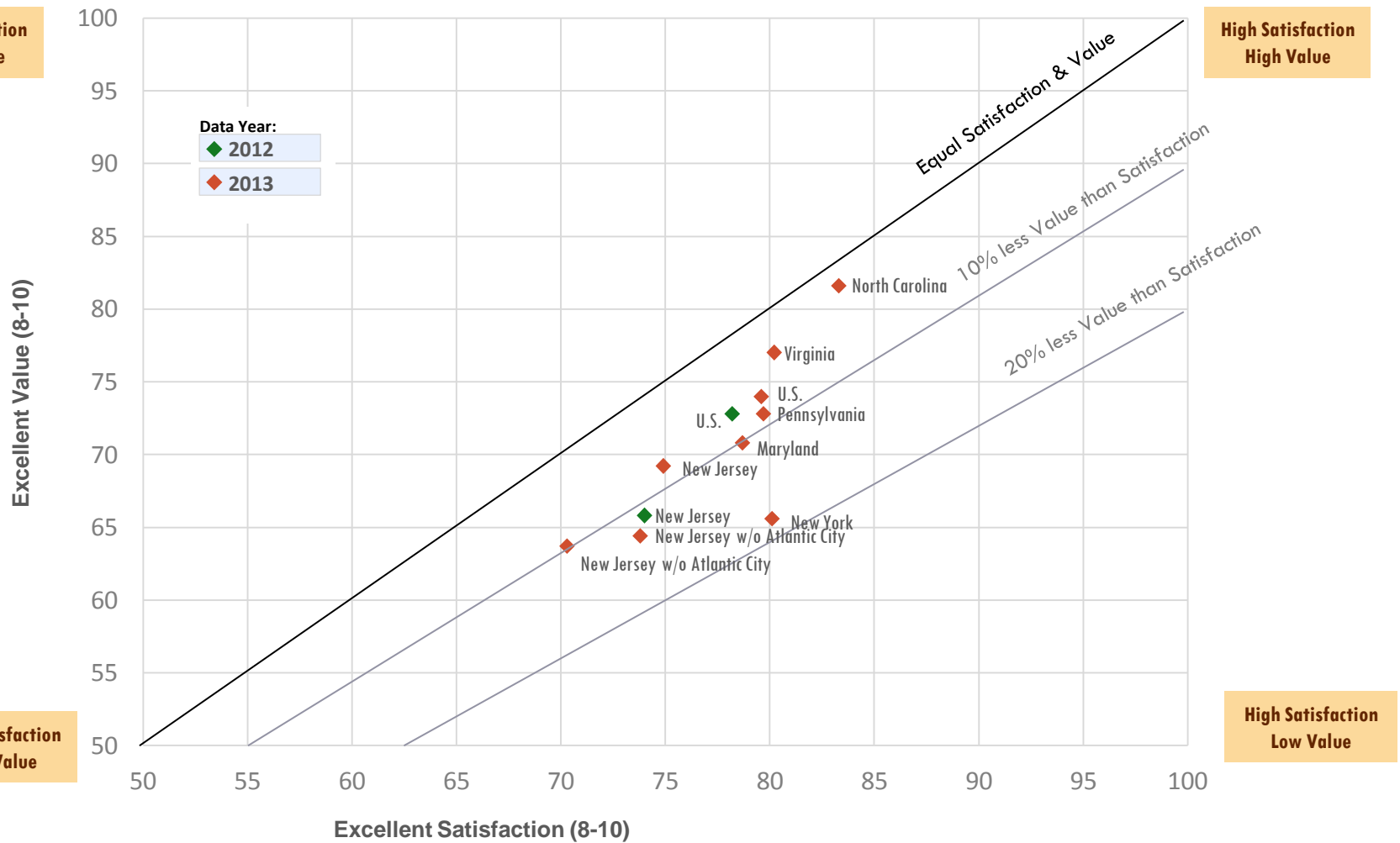
After substantial drops in Excellent (8-10) ratings in 2012, Value for the Money ratings have stabilized in 2013 for the entire state as well as the non-Atlantic City regions. Excluding Pennsylvania, which experienced a drop in Value ratings, the competitive states, also remained fairly consistent between 2012 and 2013.

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.

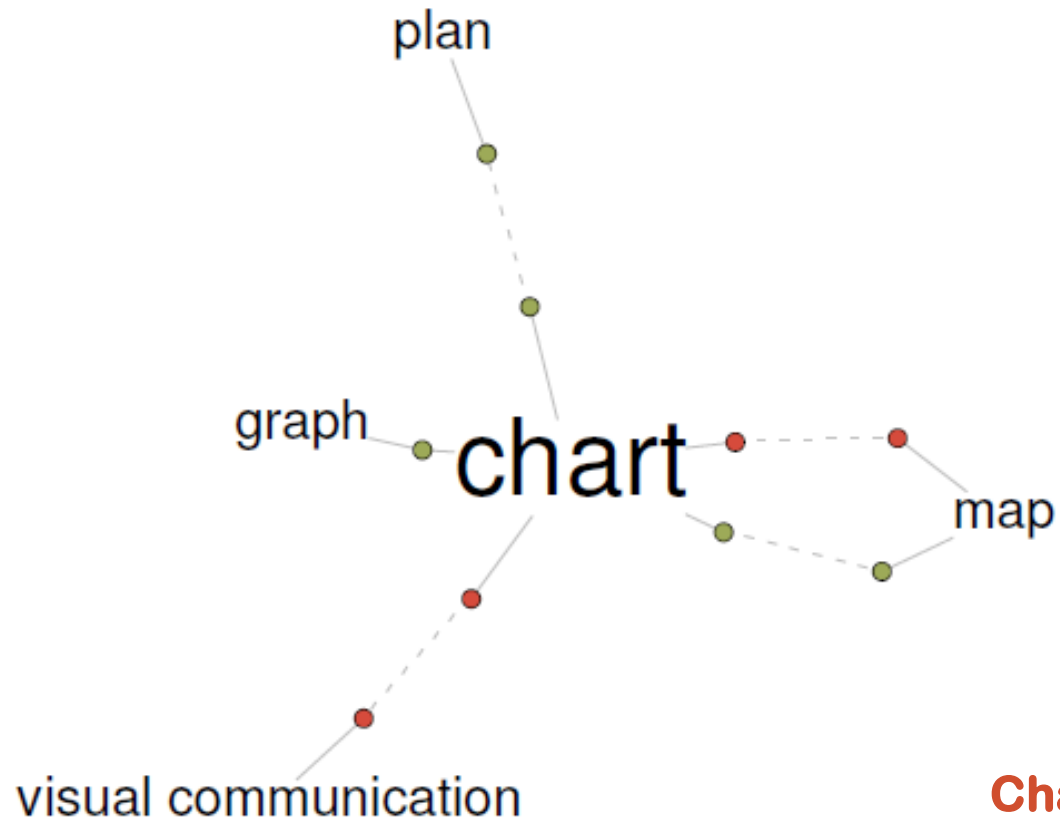
Satisfaction and Value
Stabilized

New Jersey Ratings

PERFORMANCE RATINGS



Segment: 2012/2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,110 household count



Charts and Graphs

New Jersey Year-End 2013 Visitor Profile

U.S. Travel Segments

MARKET SHARE

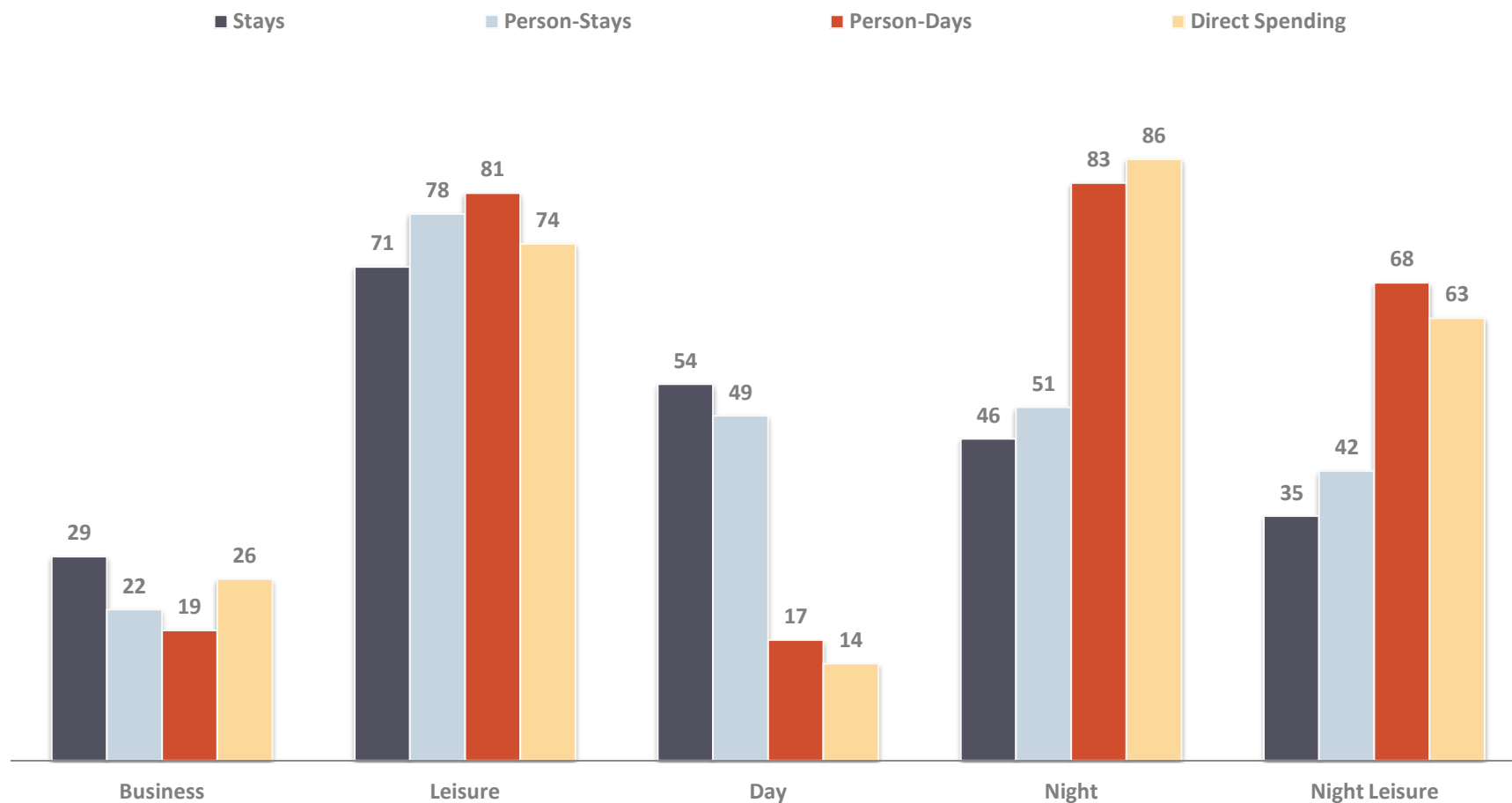
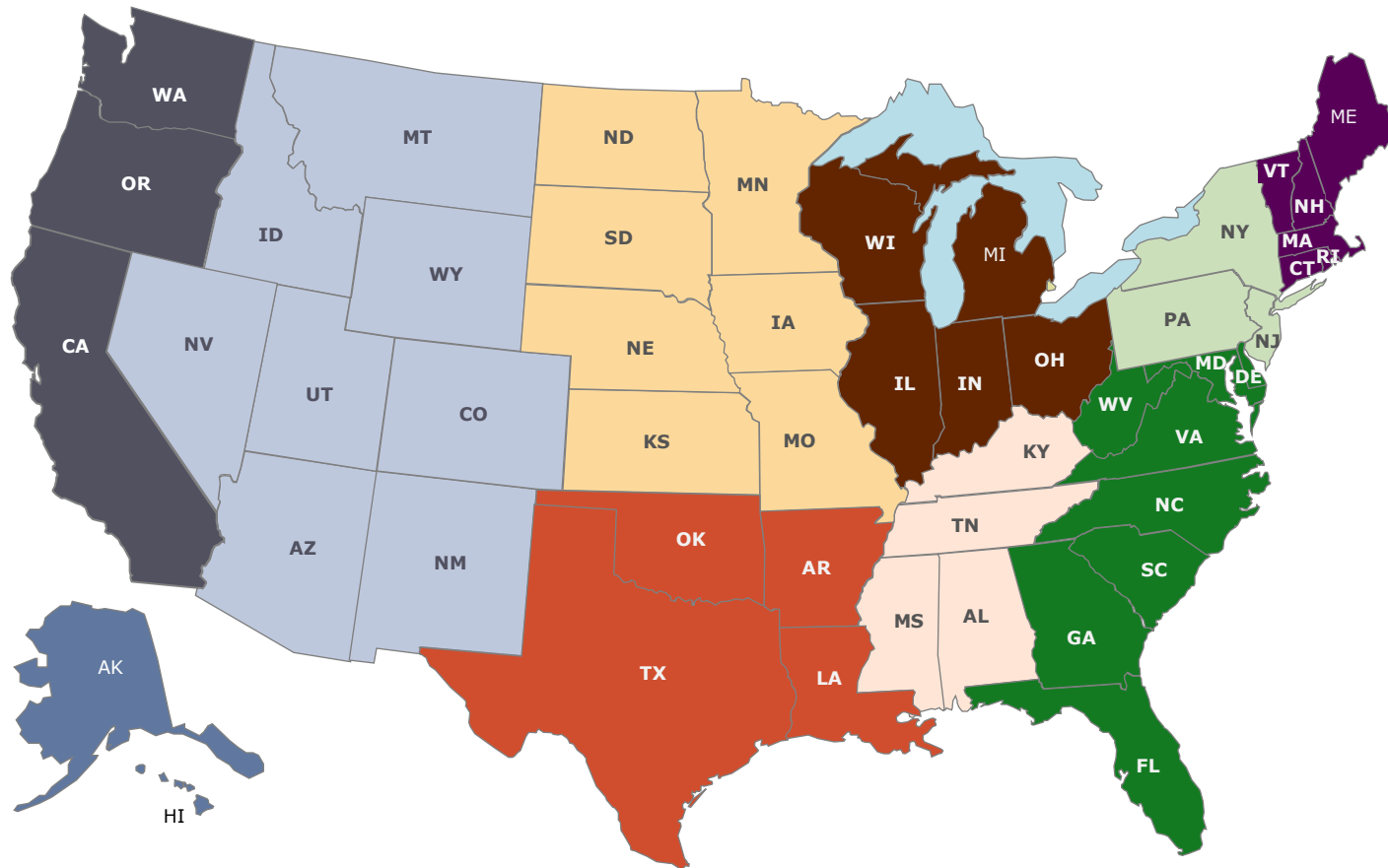


Chart 1 • Segment: 2013 Total Volume (%)

U.S. Travel Volume Change by Division

VOLUME



LEGEND

Pacific	6.8%
Mountain	-6.1%
West North Central	15.3%
West South Central	23.2%
East North Central	1.3%
East South Central	7.7%
New England	22.6%
Middle Atlantic	-6.2%
South Atlantic	2.8%

Chart 2 • Segment: 2012/2013 Overnight Leisure Person-Stays (%)

New Jersey Person-Stays Volume

VOLUME

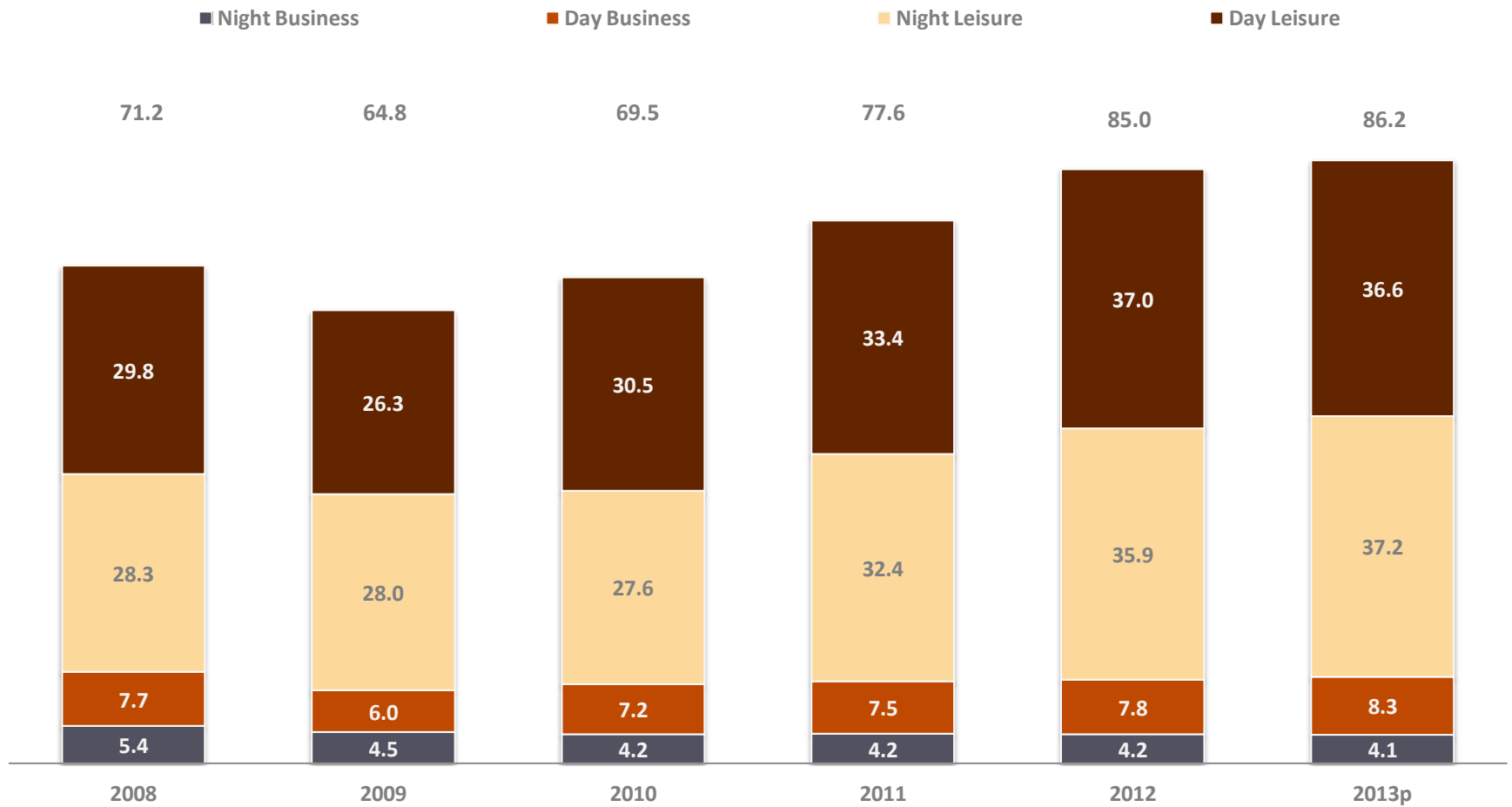


Chart 3 • in Millions

New Jersey Person-Stays Volume

VOLUME

New Jersey						U.S.
	09/08	10/09	11/10	12/11	13/12	13/12
Total	-9.0%	7.2%	11.8%	9.5%	1.4%	2.4%
Business	-19.7%	8.4%	3.4%	2.7%	2.5%	2.1%
Leisure	-6.6%	7.0%	13.4%	10.7%	1.2%	2.5%
Day	-14.0%	16.7%	8.7%	9.5%	0.0%	1.3%
Night	-3.4%	-2.1%	15.4%	9.4%	2.9%	3.5%
Day Business	-21.8%	19.1%	4.6%	4.5%	5.4%	4.5%
Day Leisure	-11.9%	16.1%	9.7%	10.7%	-1.1%	0.3%
Night Business	-16.7%	-6.1%	1.3%	-0.4%	-2.9%	-1.1%
Night Leisure	-0.9%	-1.5%	17.5%	10.7%	3.6%	4.5%

Chart 4 • % change

New Jersey Direct Spending Volume

DIRECT SPENDING

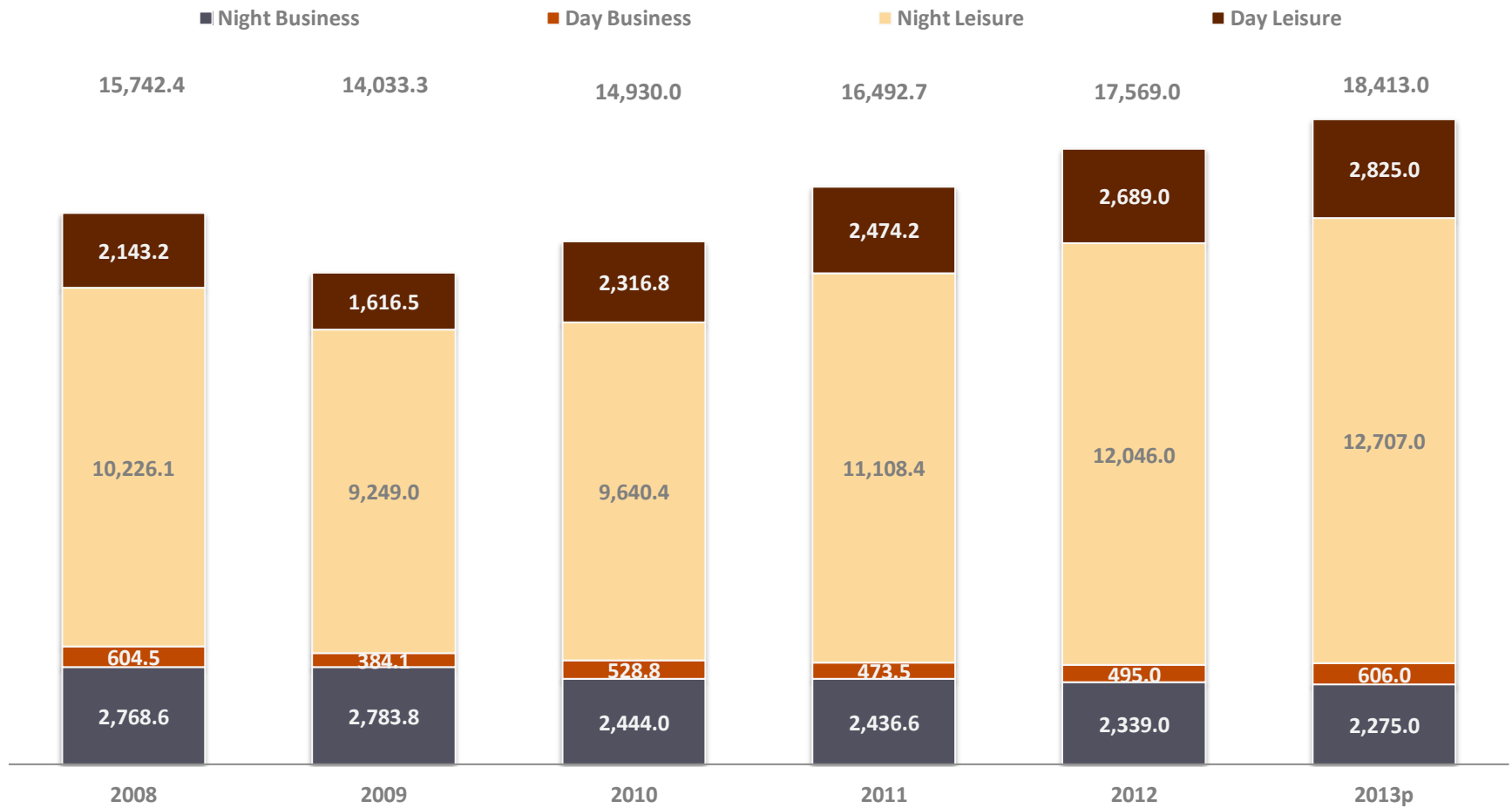


Chart 5 • \$ Millions

New Jersey Direct Spending Volume

DIRECT SPENDING

	New Jersey					U.S.
	09/08	10/09	11/10	12/11	13/12	13/12
Total	-10.9%	6.4%	10.5%	6.5%	4.8%	6.3%
Business	-6.2%	-6.1%	-2.1%	-2.6%	1.6%	1.9%
Leisure	-12.2%	10.0%	13.6%	8.5%	5.4%	7.9%
Day	-27.3%	42.5%	3.6%	8.0%	7.8%	6.2%
Night	-7.4%	0.4%	12.1%	6.2%	4.1%	6.3%
Day Business	-36.5%	37.7%	-10.5%	4.6%	22.3%	4.9%
Day Leisure	-24.6%	43.3%	6.8%	8.7%	5.1%	6.5%
Night Business	0.5%	-12.2%	-0.3%	-4.0%	-2.7%	1.5%
Night Leisure	-9.6%	4.2%	15.2%	8.4%	5.5%	8.1%

Chart 6 • % change

New Jersey Travel Segments

MARKET SHARE

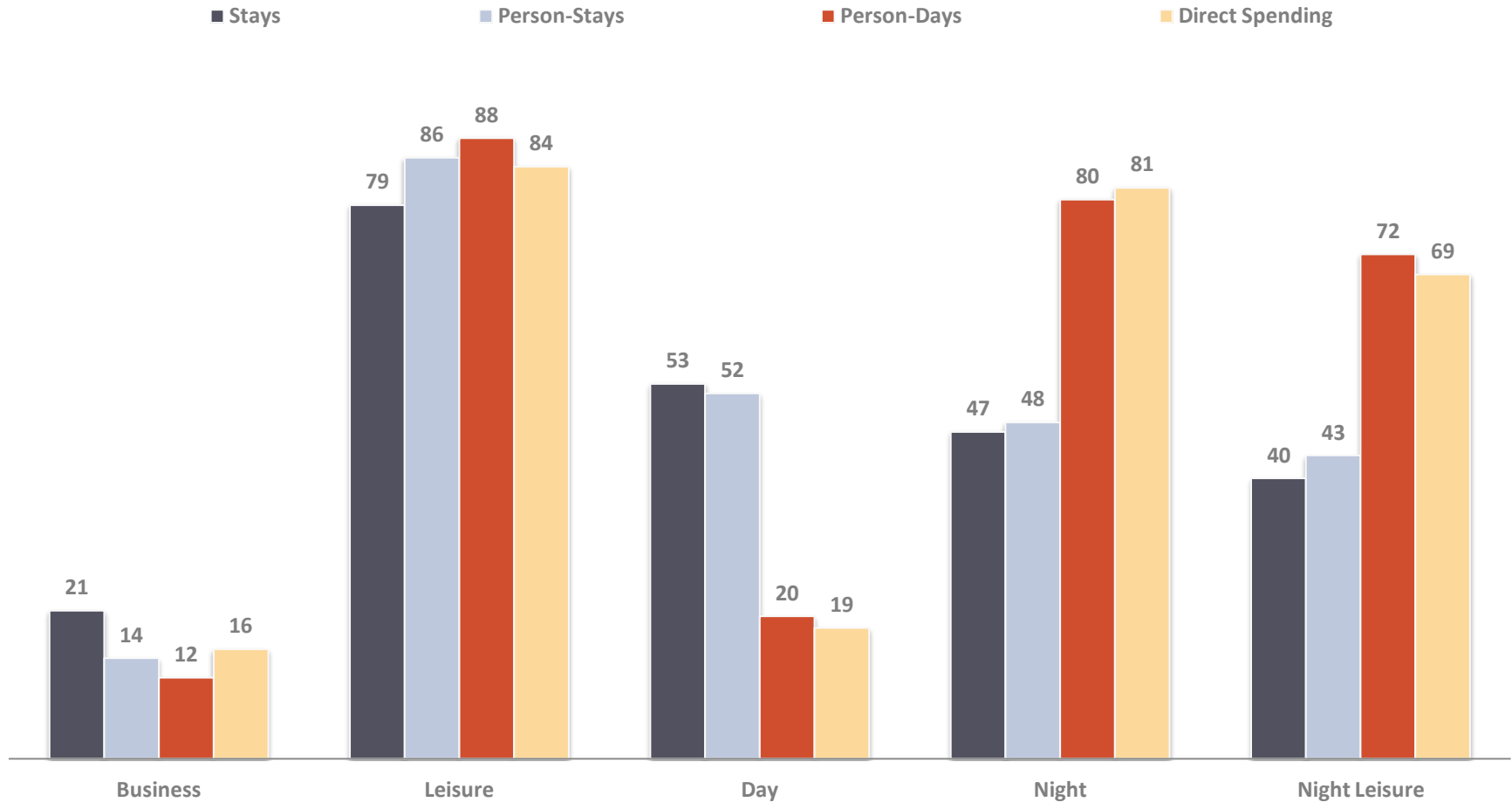


Chart 7 • Segment: 2013 Total Volume (%)

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

MARKET SHARE

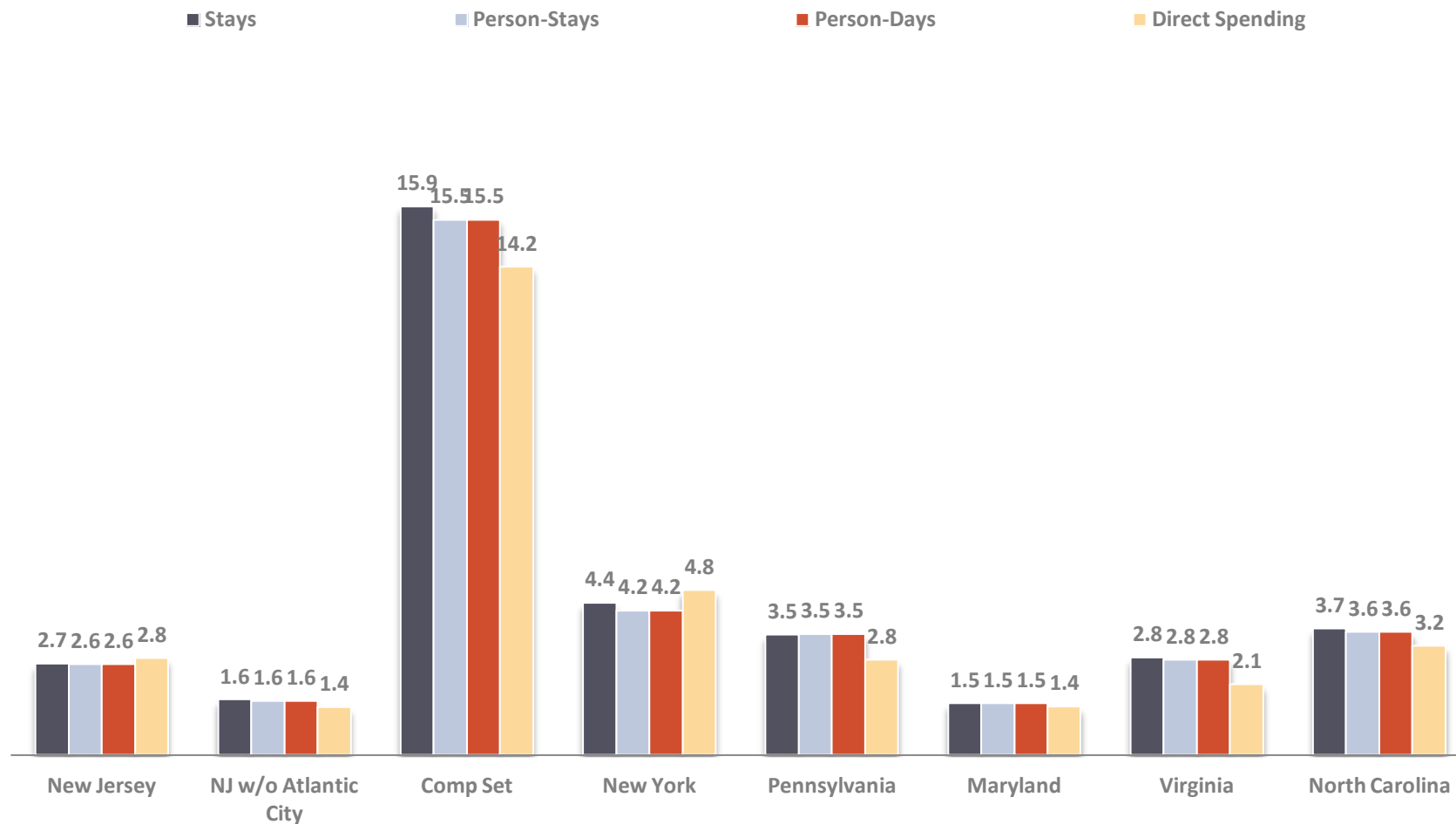


Chart 8 • Segment: 2013 Overnight Leisure (%) • New Jersey N = 1,110 household count

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

DEMOGRAPHICS

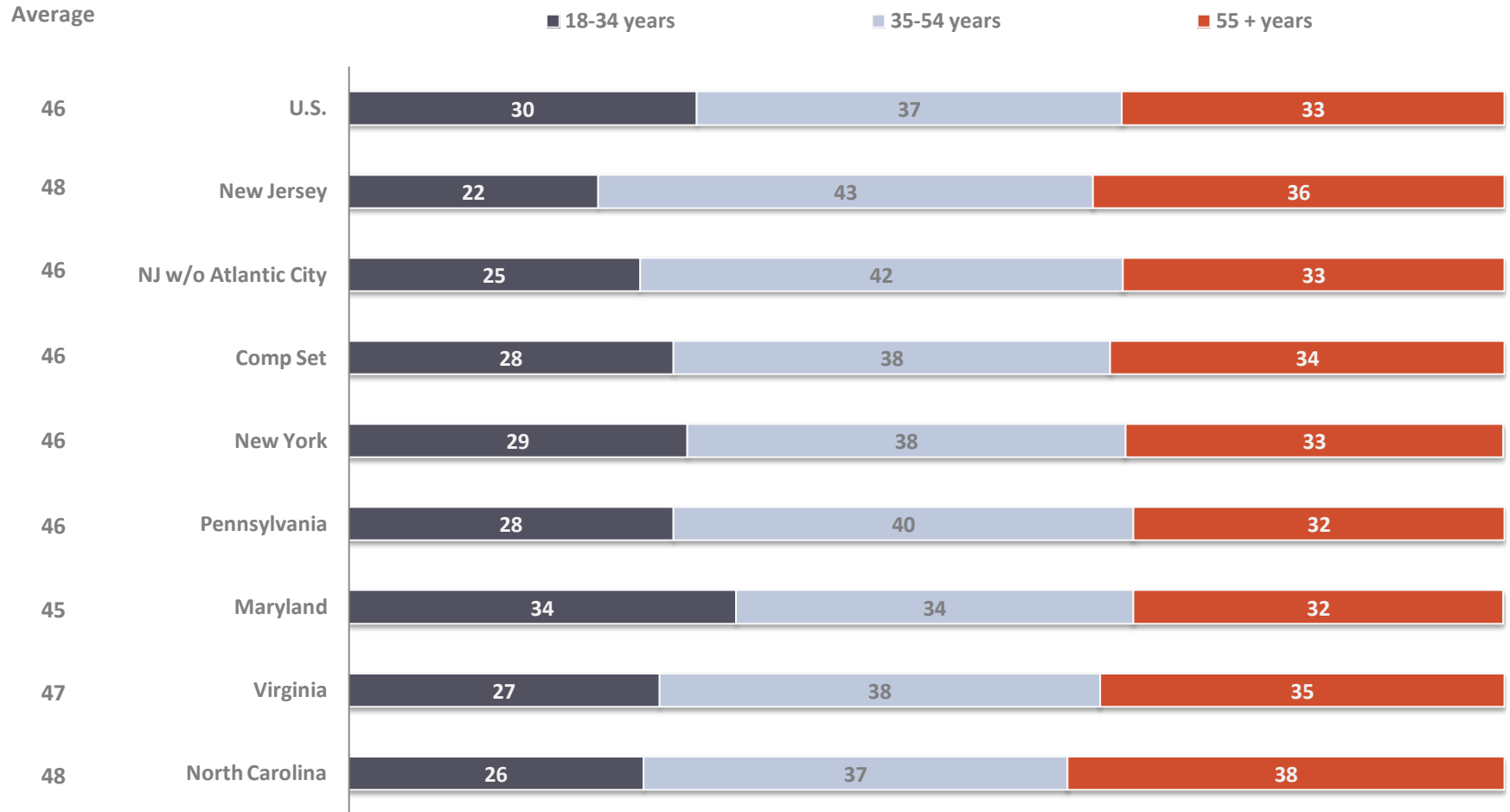


Chart 9 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,110 household count

New Jersey Avg. Party per Trip Spending by Age

DEMOGRAPHICS

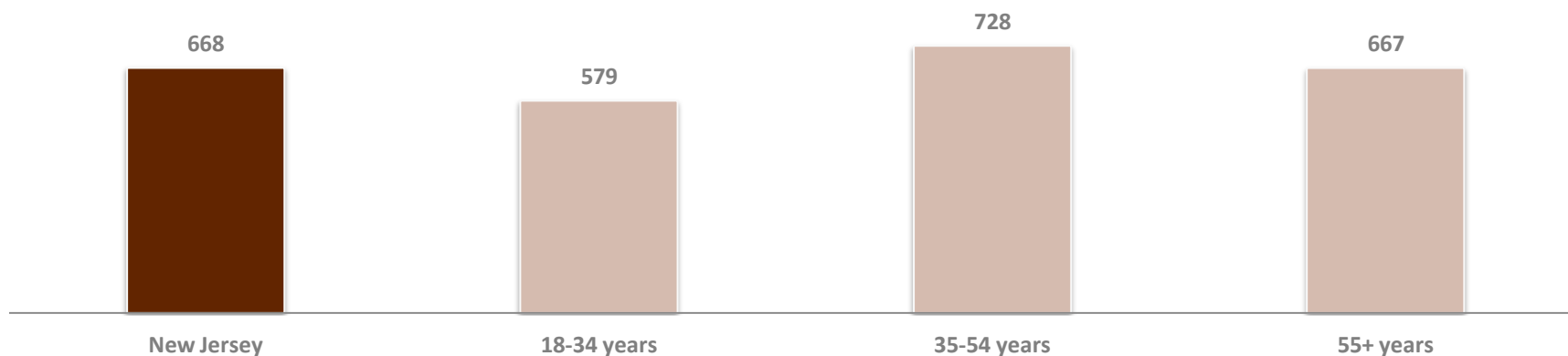


Chart 10 • Segment: 2011-2013 Overnight Leisure Stays (\$) • New Jersey N = 4,176 household count

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

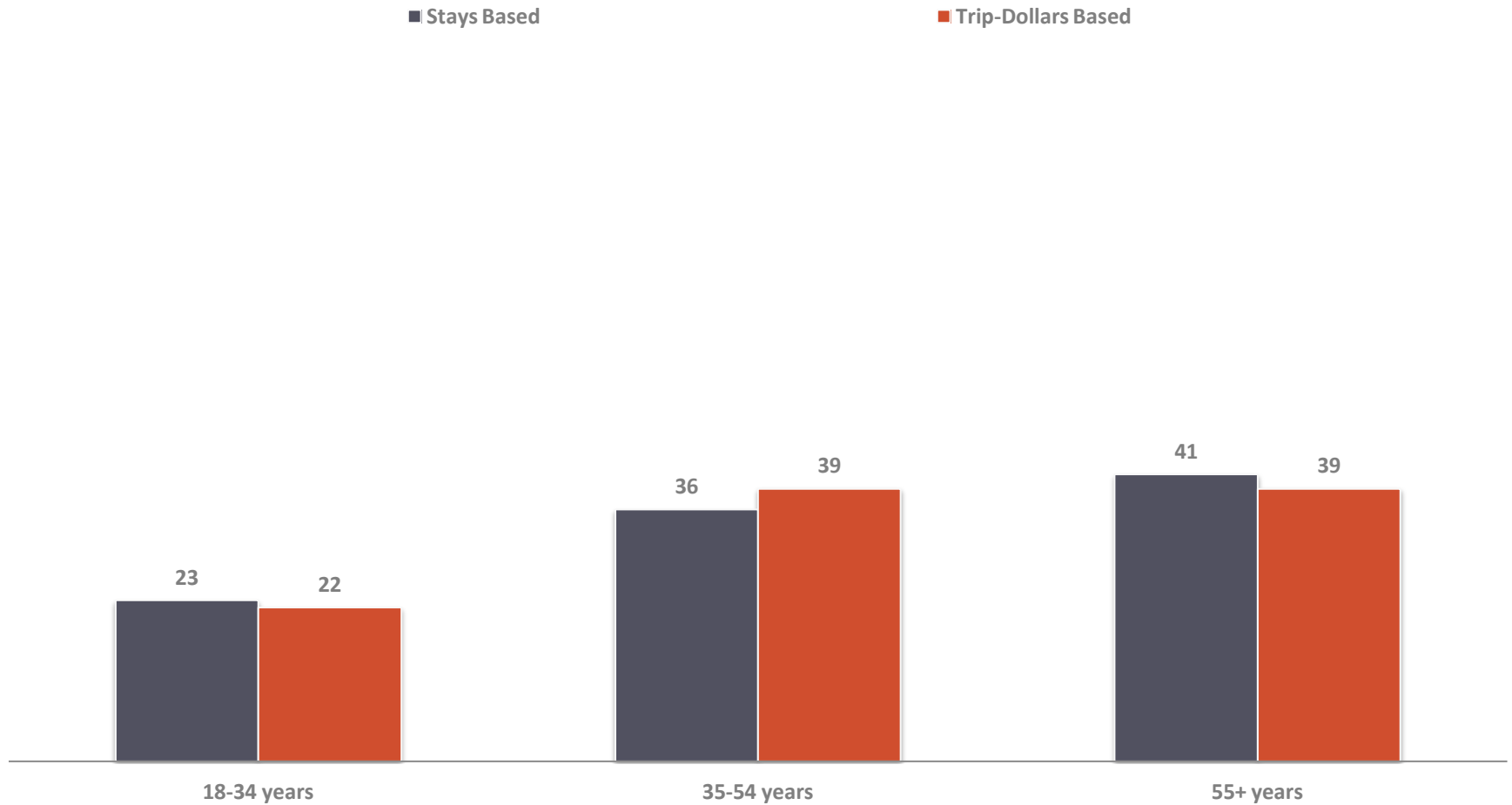


Chart 11 • Segment: 2011-2013 Overnight Leisure (%) • New Jersey N = 4,176 household count

Racial Distribution and Hispanic Origin: U.S., New Jersey and Comp Set

DEMOGRAPHICS

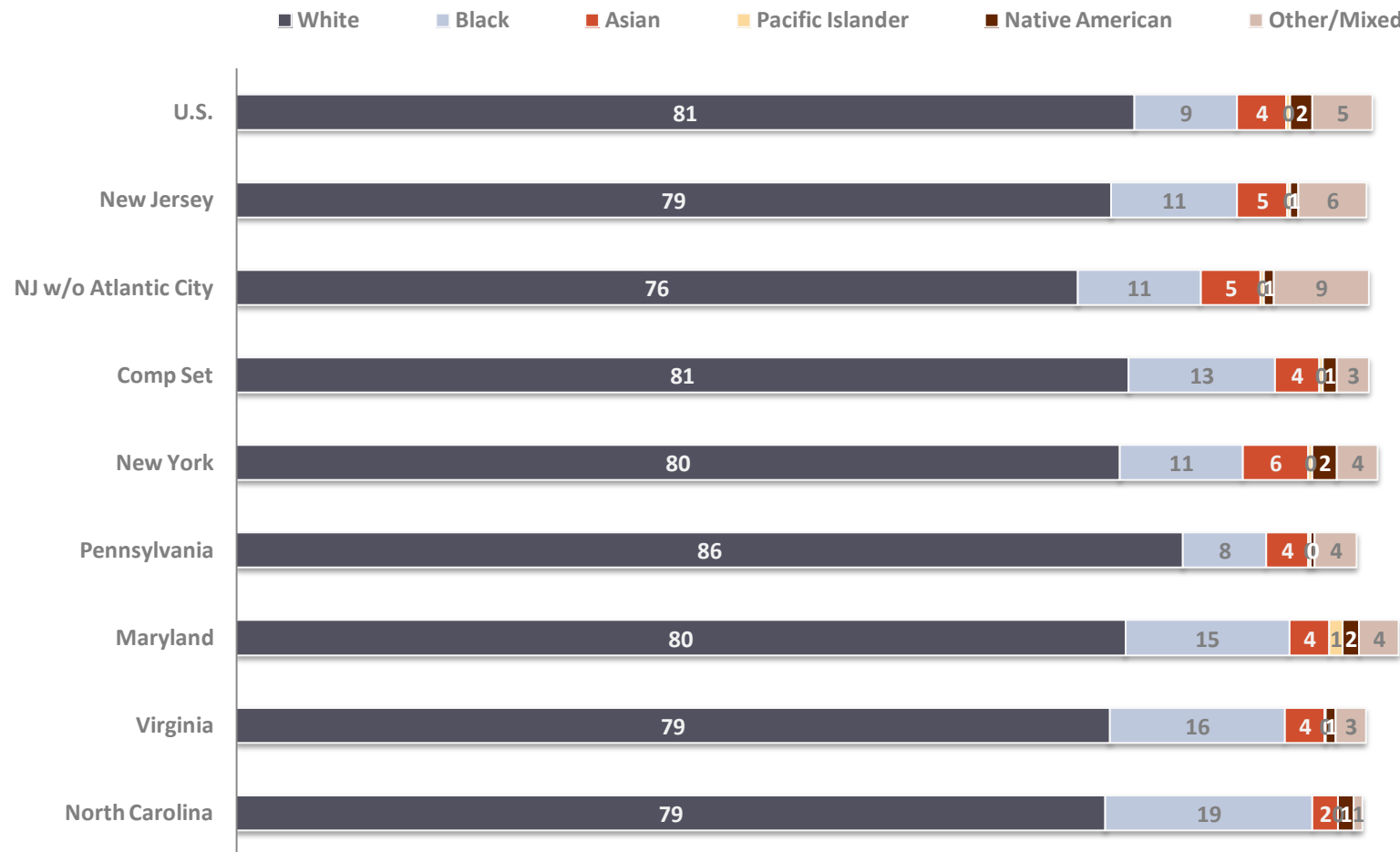


Chart 12 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,094 household count

Ethnic Origin: U.S., New Jersey and Comp Set

DEMOGRAPHICS

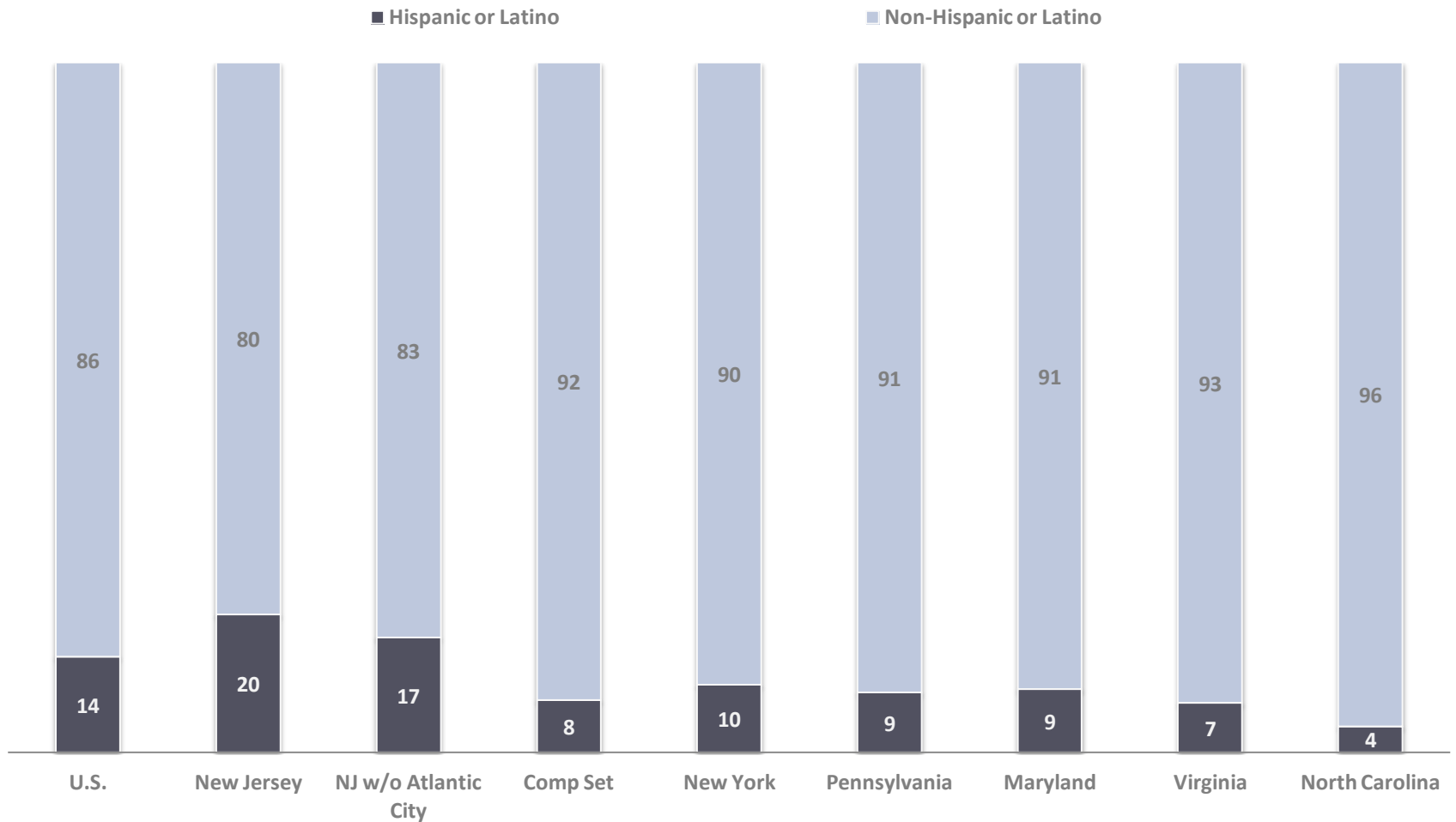


Chart 13 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,094 household count

Sexual Orientation: U.S., New Jersey and Comp Set

DEMOGRAPHICS

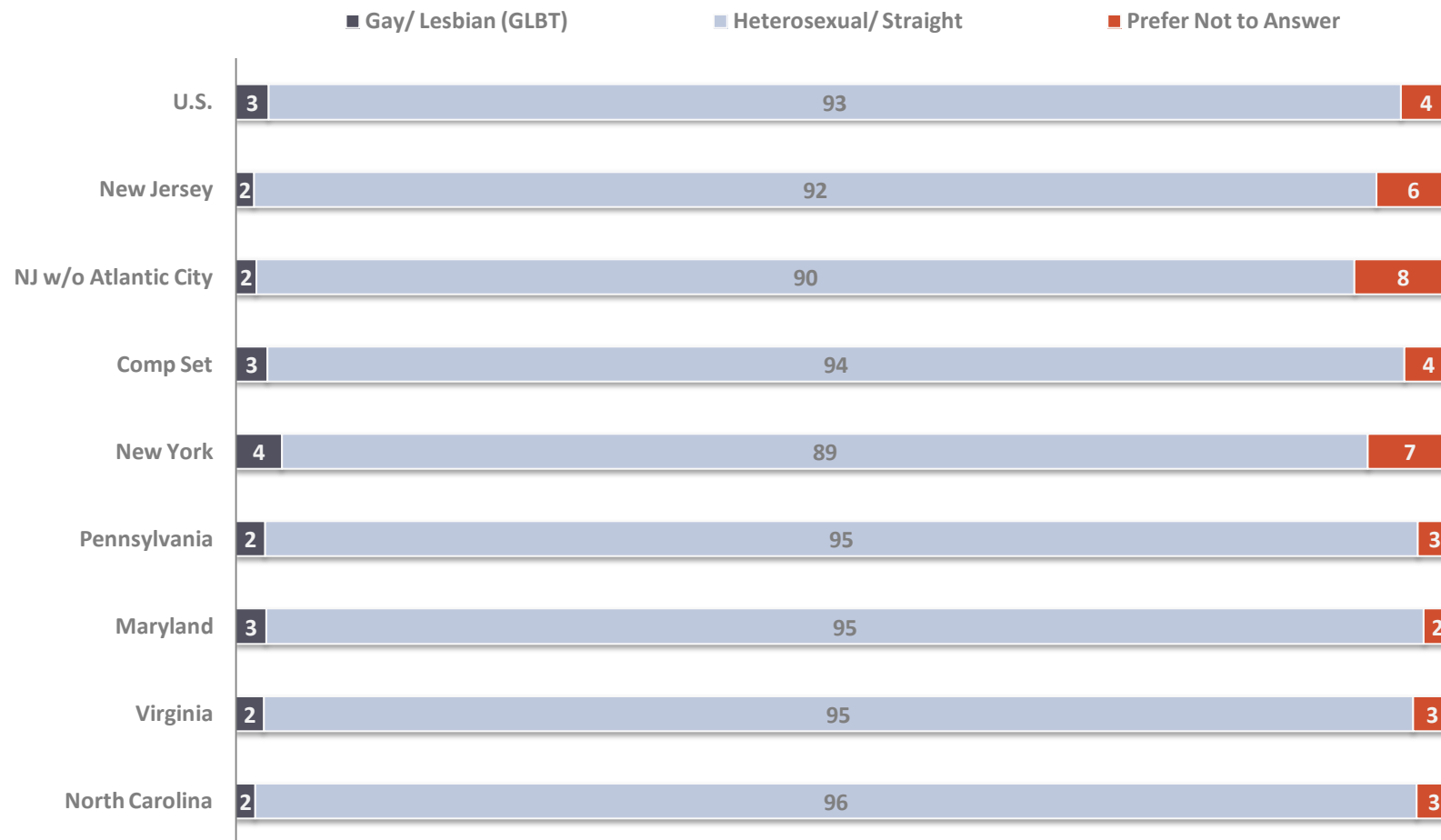


Chart 14 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,110 household count

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

DEMOGRAPHICS

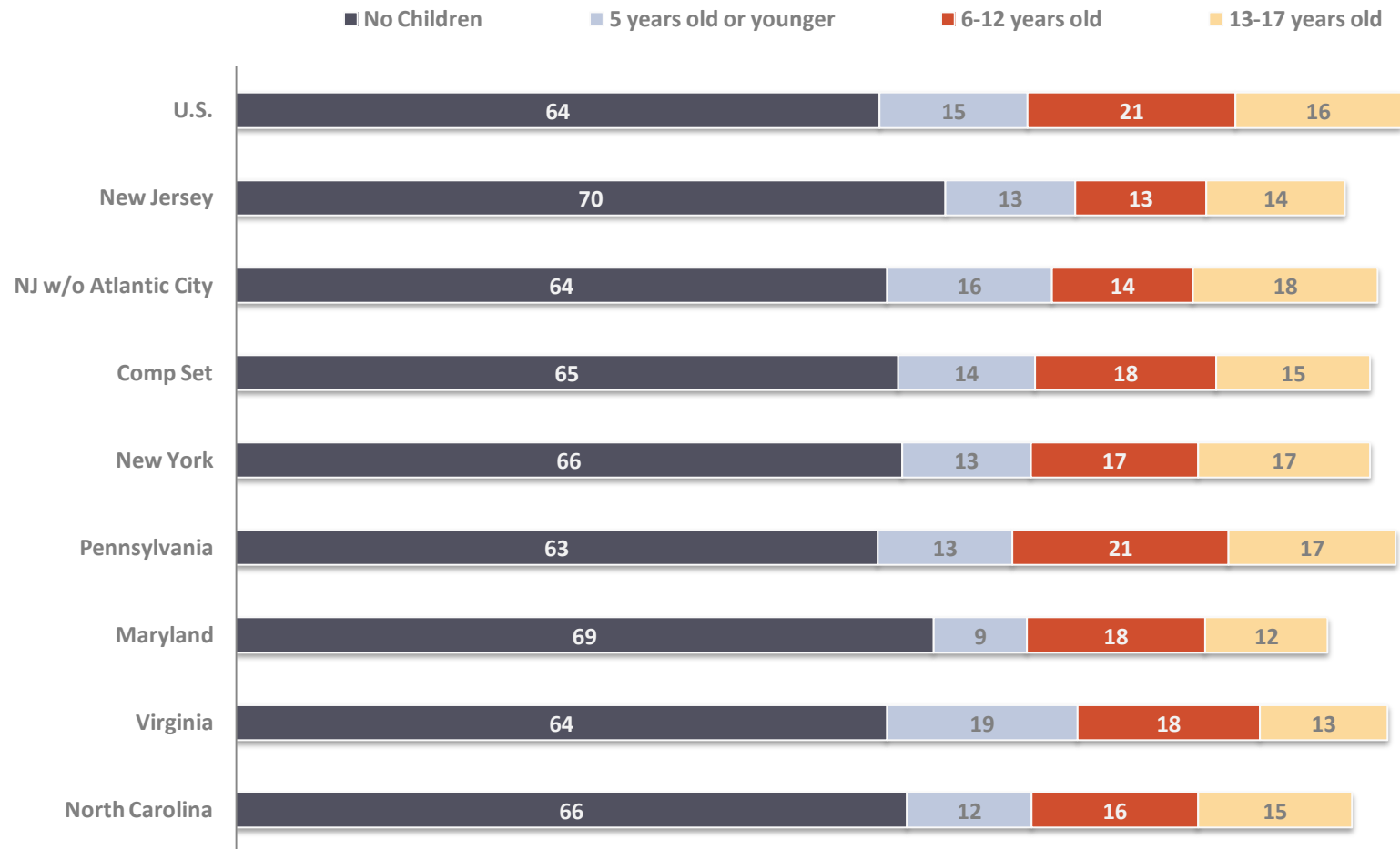


Chart 15 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,110 household count

GLOSSARY

Sum exceeds 100% due to multiple-children households.

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

DEMOGRAPHICS

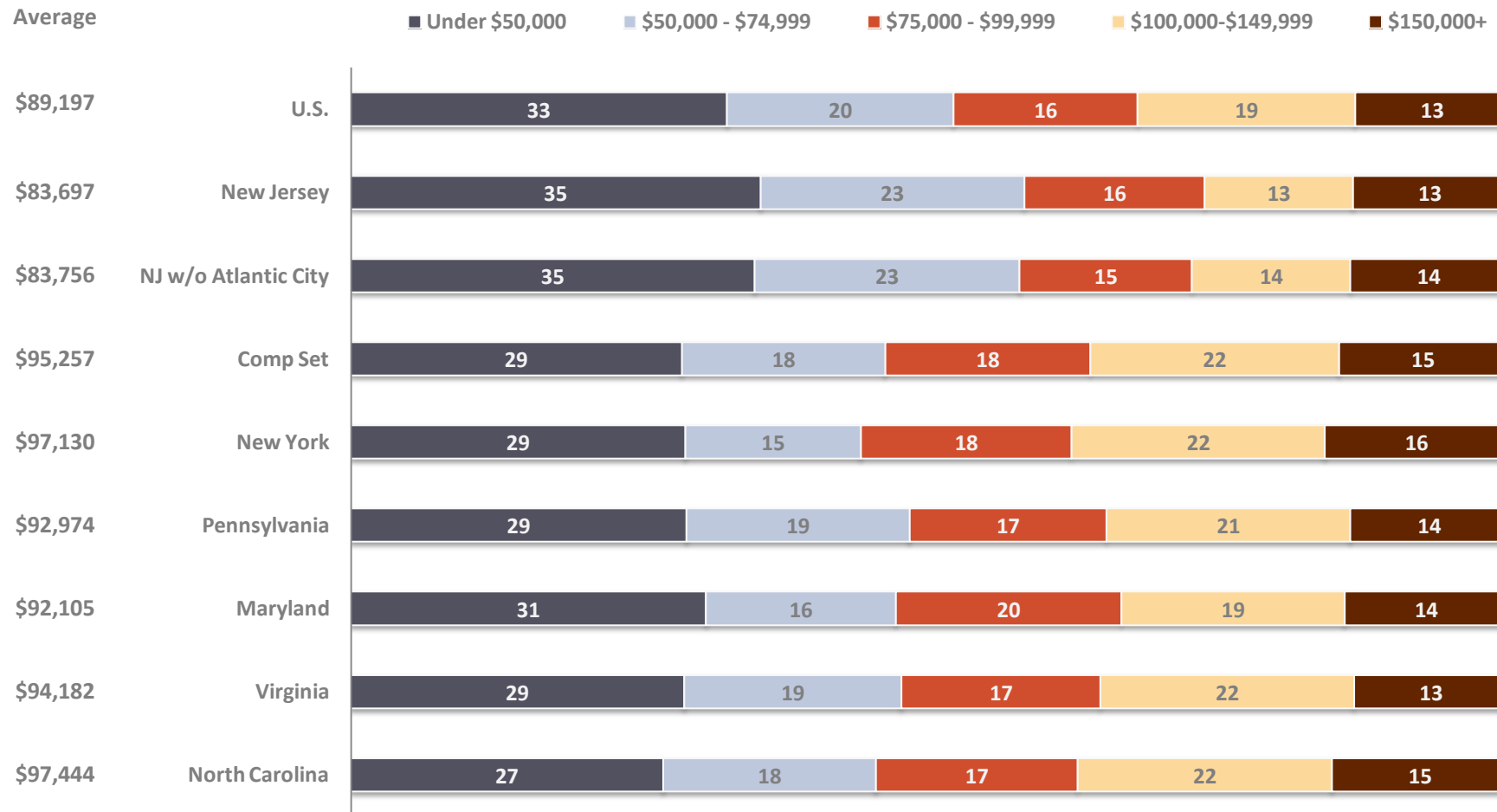


Chart 16 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,110 household count

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

DEMOGRAPHICS

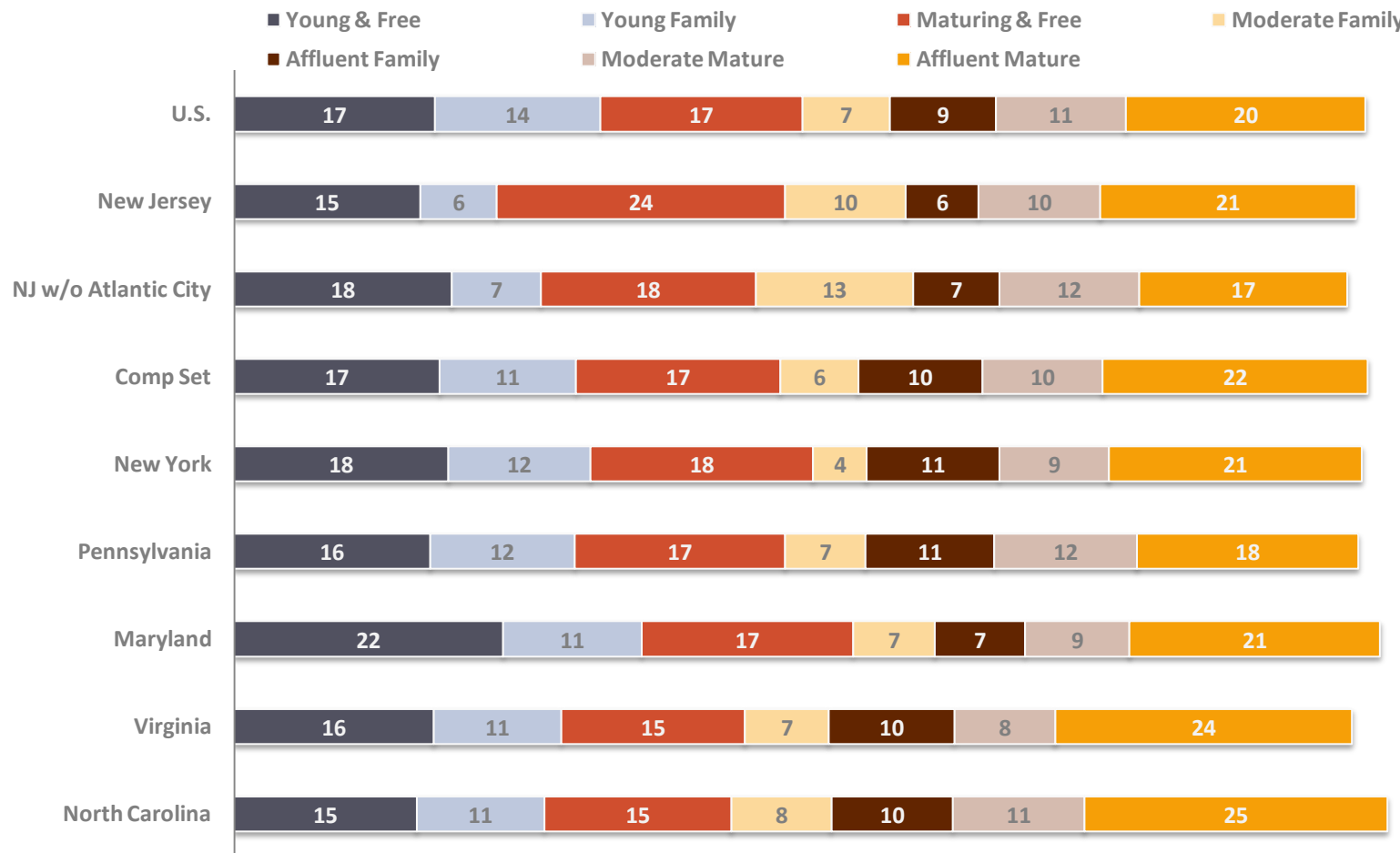


Chart 17 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,110 household count

New Jersey Avg. Party per Trip Spending by Lifestage

DEMOGRAPHICS

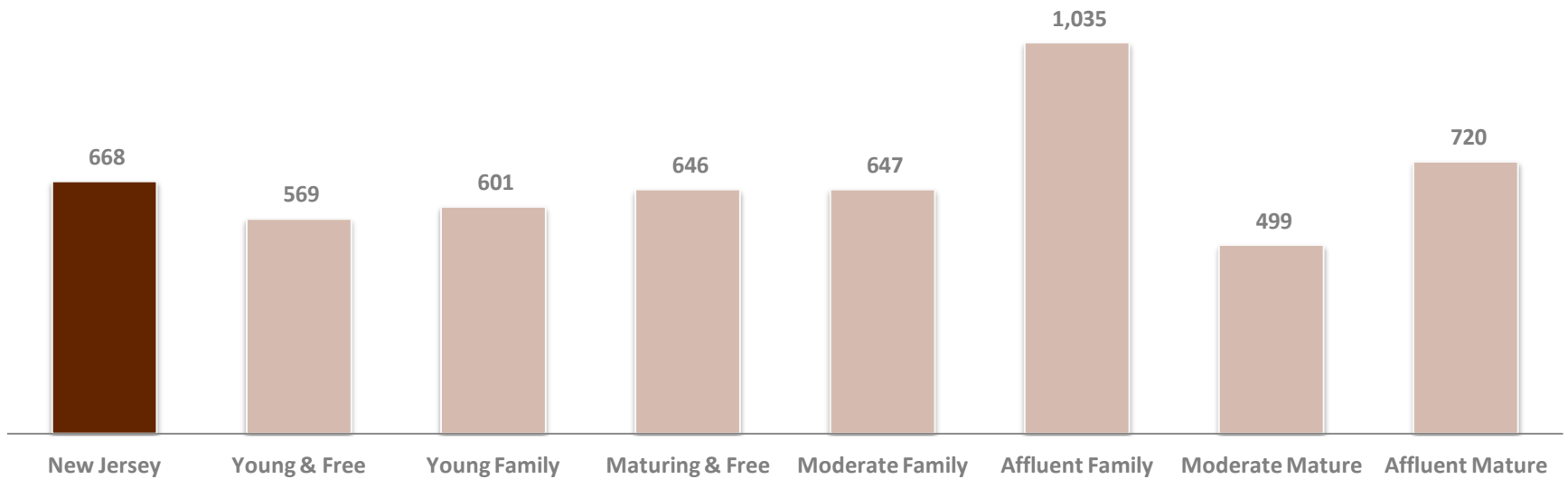


Chart 18 • Segment: 2011-2013 Overnight Leisure Stays (\$) • New Jersey N = 4,176 household count

New Jersey Lifestage Comparison

DEMOGRAPHICS

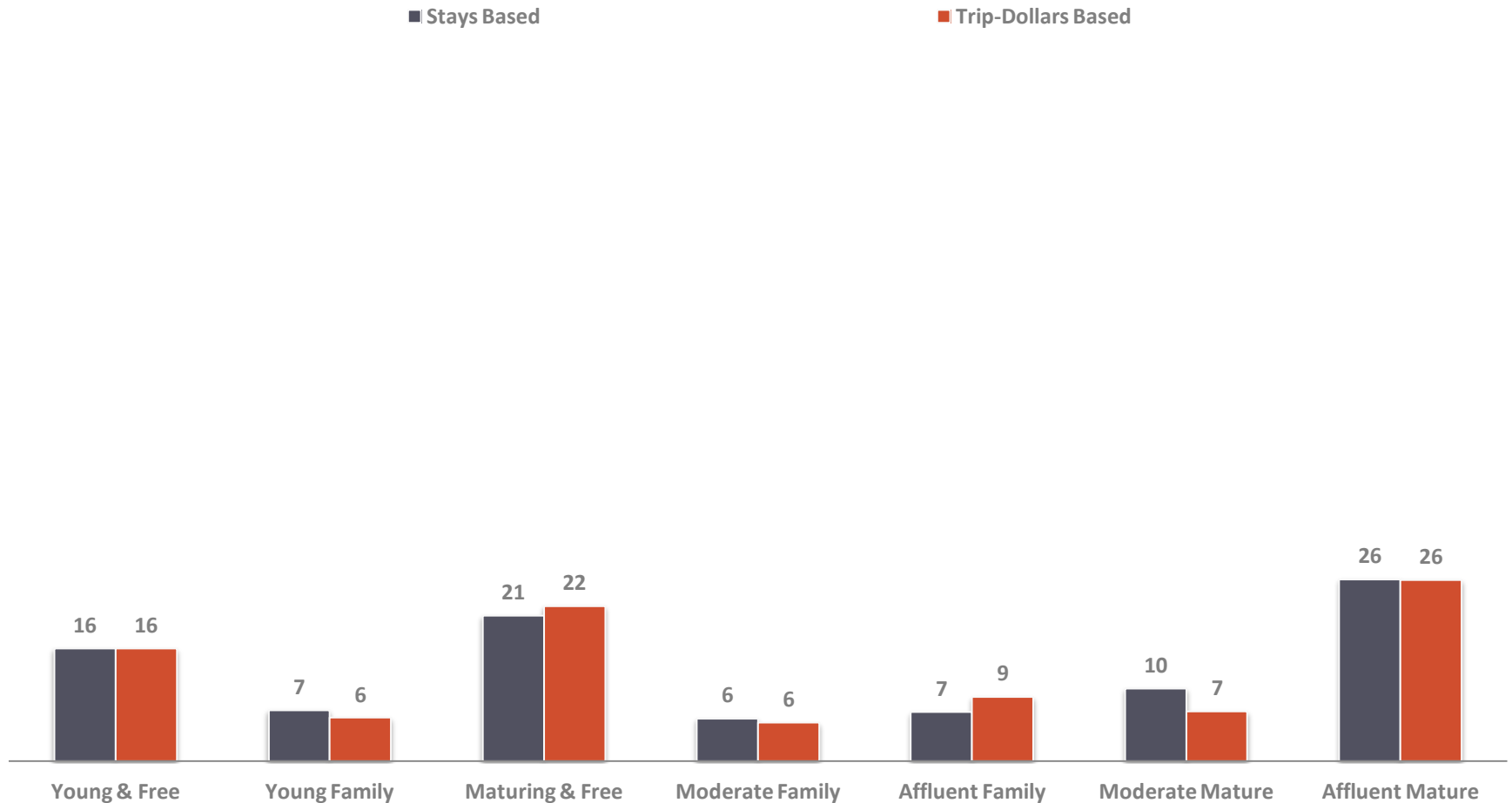


Chart 19 • Segment: 2011-2013 Overnight Leisure (%) • New Jersey N = 4,176 household count

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

DEMOGRAPHICS

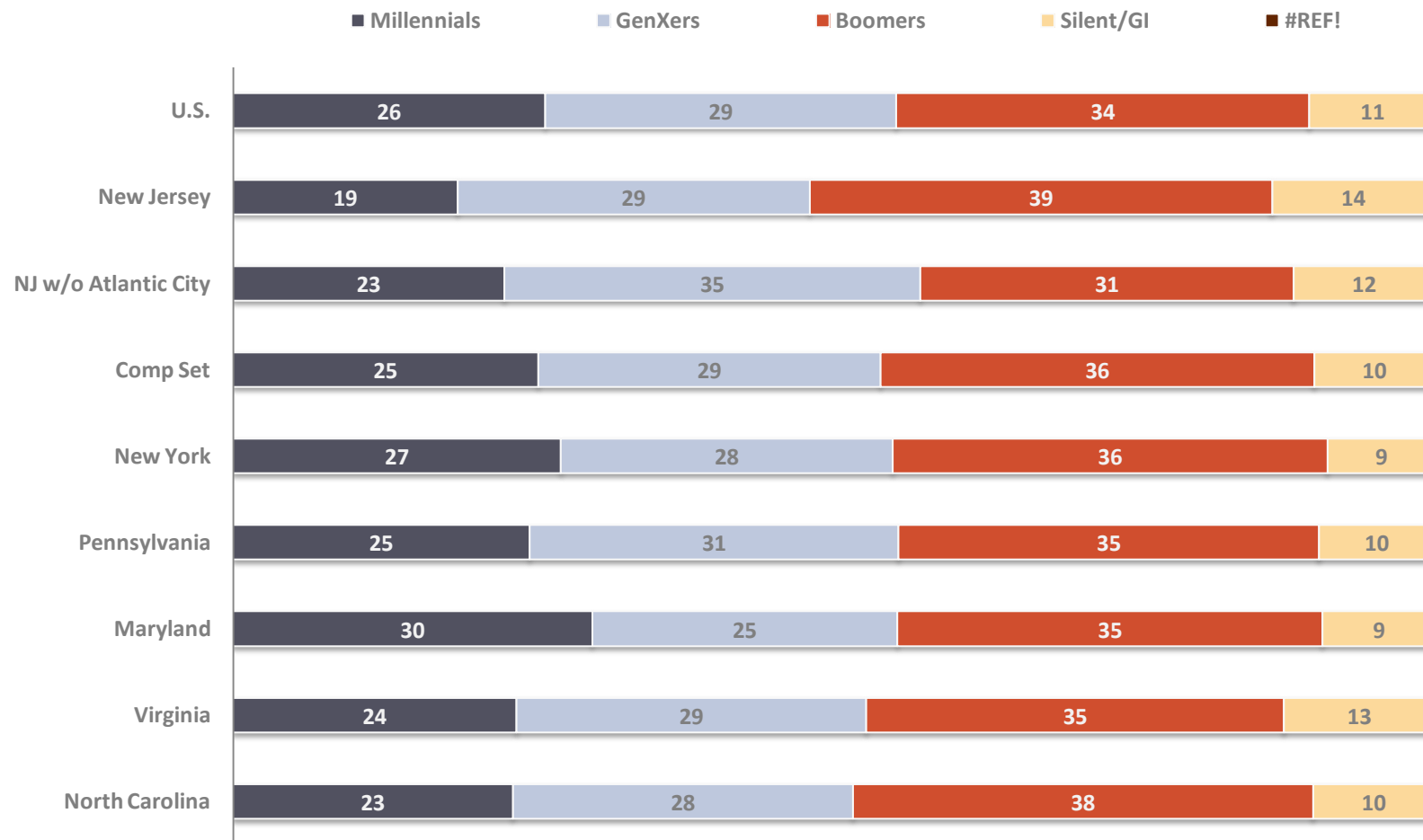


Chart 20 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,110 household count

New Jersey Avg. Party per Trip Spending by Generation

DEMOGRAPHICS

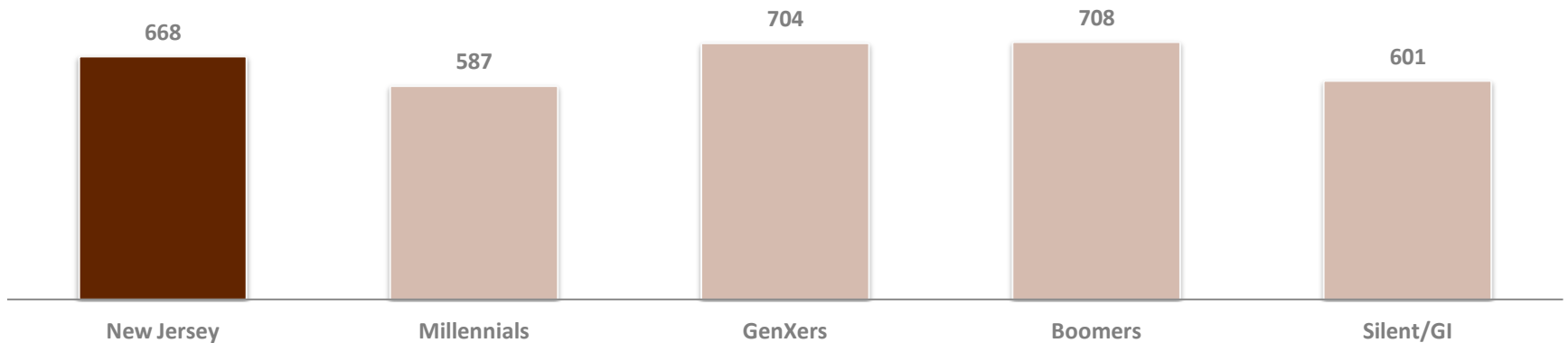


Chart 21 • Segment: 2011-2013 Overnight Leisure Stays (\$) • New Jersey N = 4,176 household count

New Jersey Traveler Generation Comparison

DEMOGRAPHICS

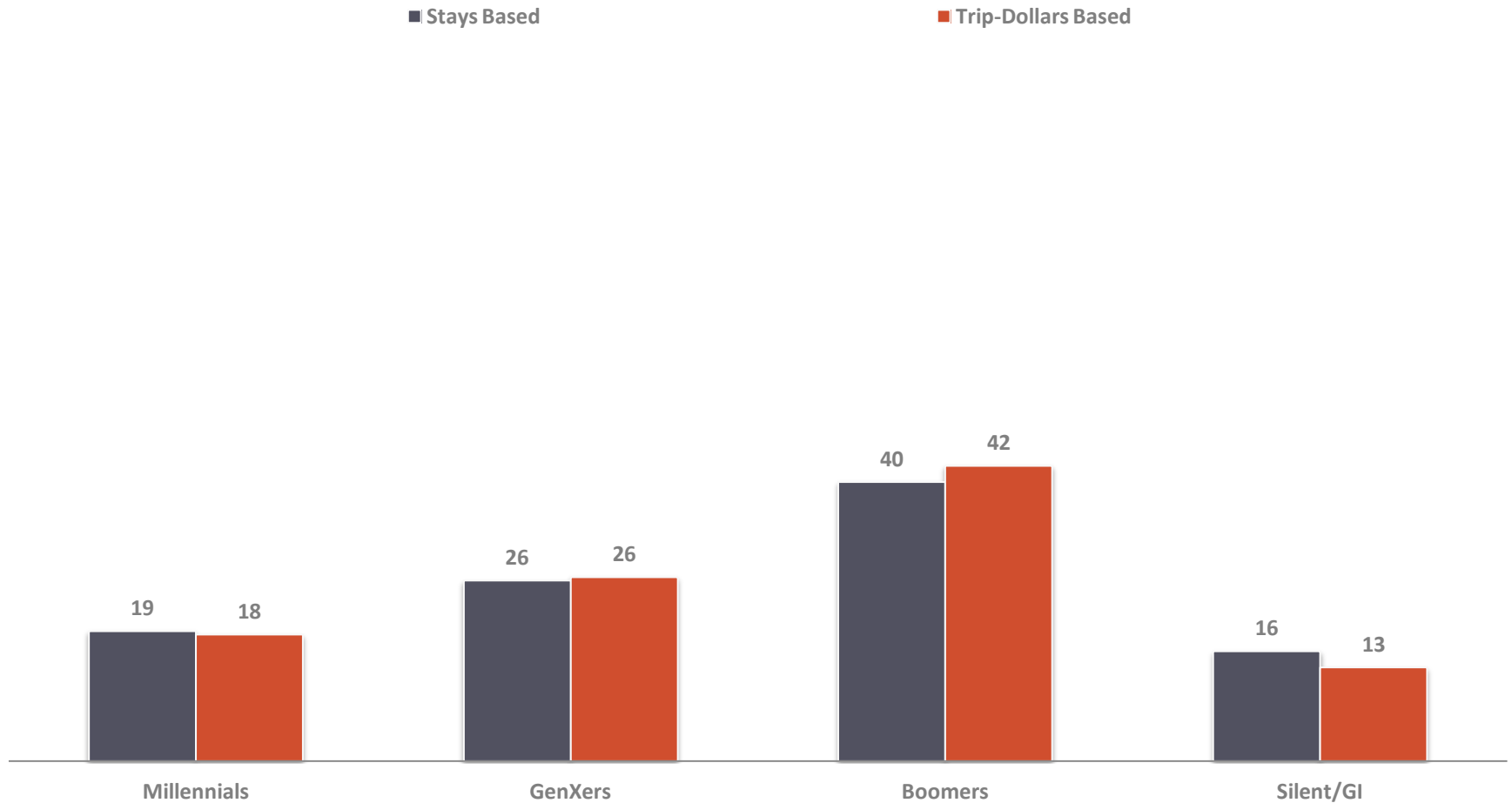
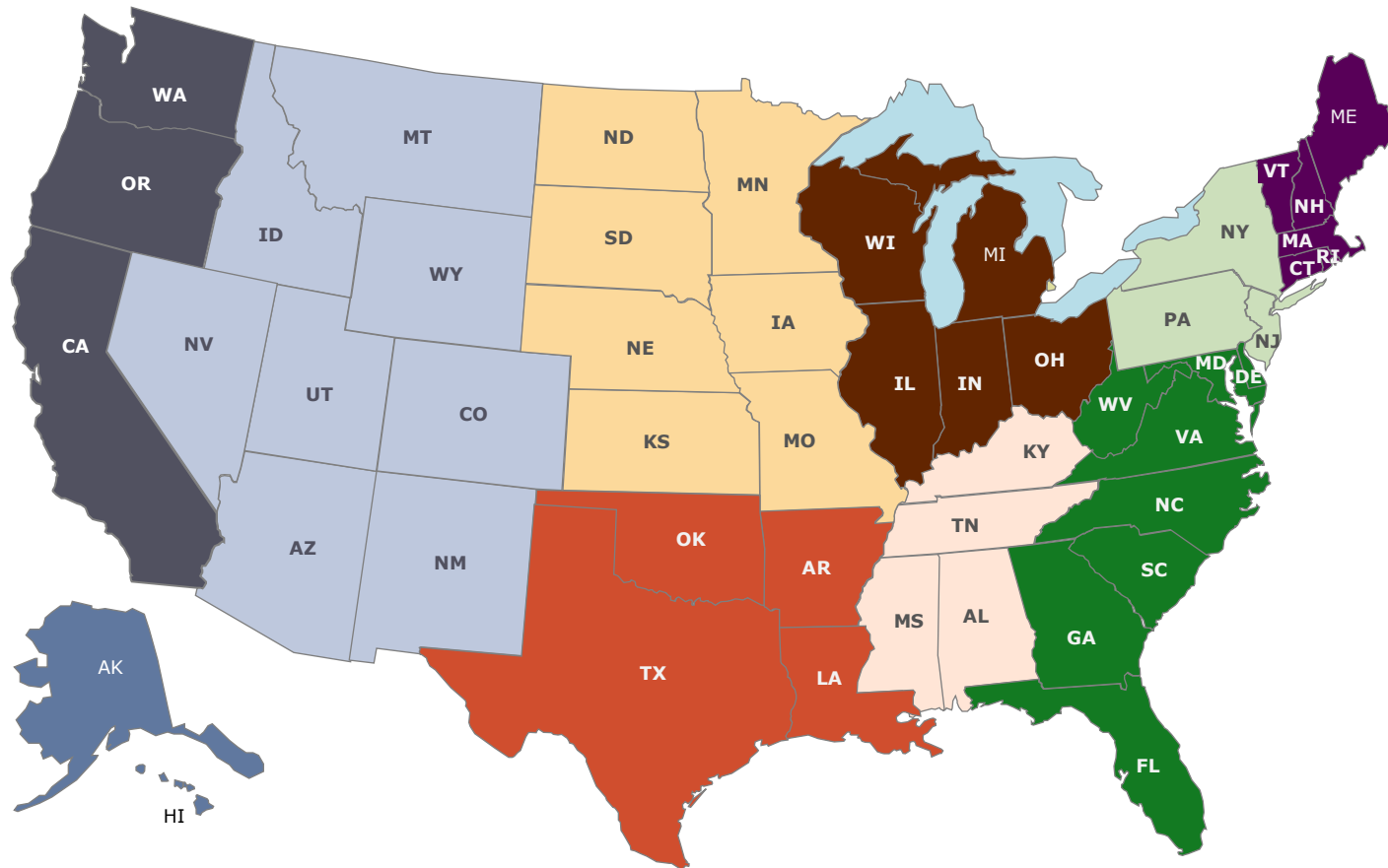


Chart 22 • Segment: 2010-2012 Overnight Leisure (%) • New Jersey N = 4,176 household count

Origin Divisions for Travel to New Jersey

TRIP ORIGIN



LEGEND

Pacific	1.2%
Mountain	0.8%
West North Central	0.1%
West South Central	1.6%
East North Central	2.9%
East South Central	0.1%
New England	4.2%
Middle Atlantic	71.2%
South Atlantic	17.9%

Chart 23 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,1208household count

Top Origin States to New Jersey

TRIP ORIGIN

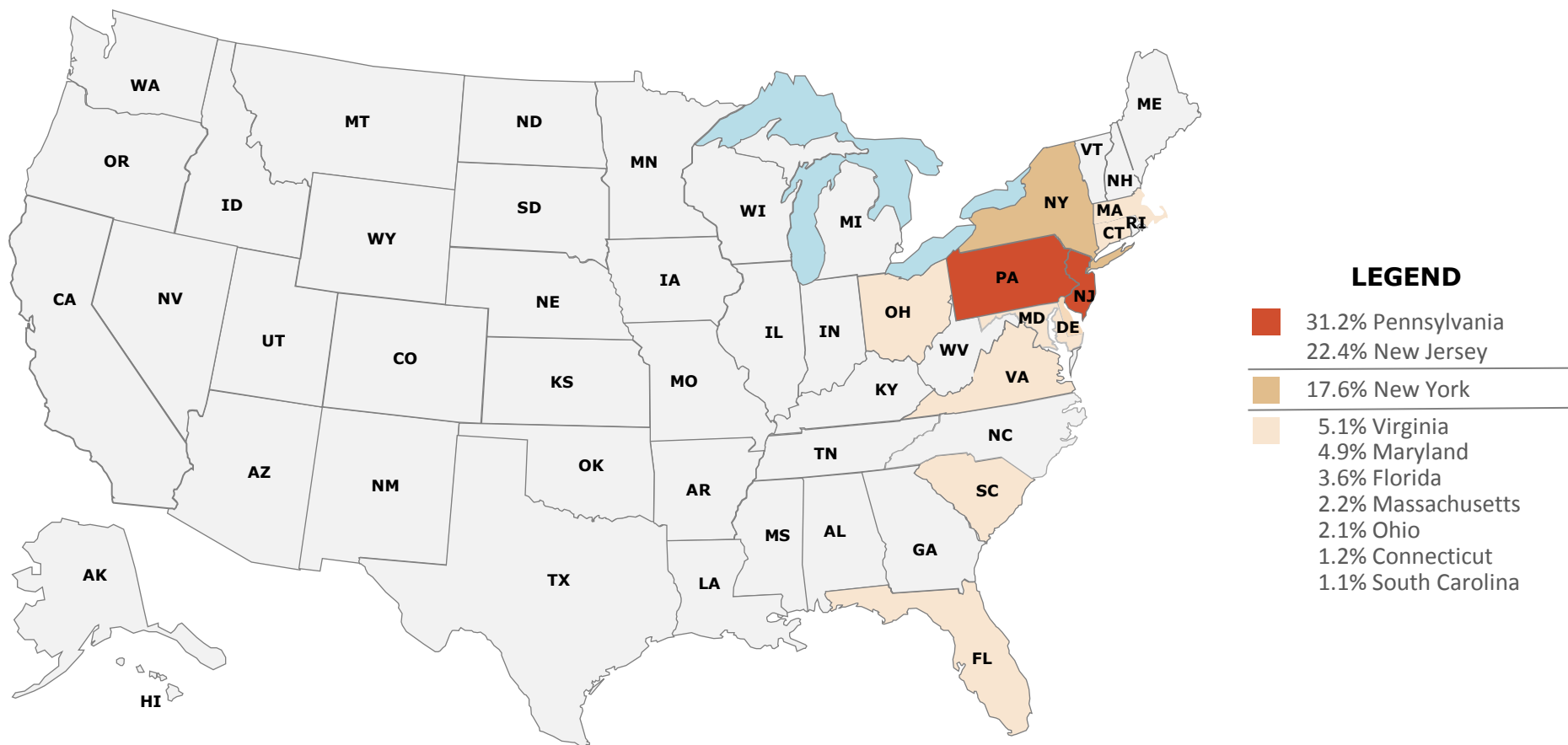


Chart 24 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,108 household count

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	5.3%	31.6%	29.1%	14.7%	25.3%	18.9%	10.7%	9.1%	4.2%
Philadelphia, PA	2.6%	30.7%	26.6%	6.2%	4.0%	11.2%	15.1%	4.8%	1.2%
Washington, DC (Hagerstown, MD)	2.3%	5.0%	5.5%	8.2%	2.8%	5.9%	14.3%	19.0%	6.3%
Albany-Schenectady- Troy, NY	0.7%	3.6%	1.4%	1.6%	4.0%	1.0%	1.4%	0.4%	0.4%
Baltimore, MD	1.0%	3.5%	3.0%	3.7%	1.6%	6.2%	10.7%	3.2%	1.0%
Wilkes Barre-Scranton, PA	0.4%	3.5%	4.4%	1.3%	0.8%	3.0%	1.4%	0.9%	0.5%
Boston, MA (Manchester, NH)	2.2%	2.5%	4.0%	2.7%	4.3%	2.1%	2.6%	2.0%	2.2%
Orlando-Daytona Beach-Melbourne, FL	1.2%	2.0%	3.4%	1.4%	1.8%	0.5%	1.9%	1.4%	1.5%
Cleveland, OH	1.3%	1.5%	1.8%	1.8%	2.2%	3.9%	0.2%	0.8%	0.9%
Harrisburg-Lancaster- Lebanon-York, PA	0.5%	1.2%	0.9%	2.4%	0.5%	5.9%	5.4%	1.6%	0.5%
Top 10 Sum	17.5%	85.1%	80.1%	44.0%	47.3%	58.6%	63.7%	43.2%	18.7%

Chart 25 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,1108 household count

New Jersey Avg. Party per Trip Spending by Origin DMA

TRIP ORIGIN

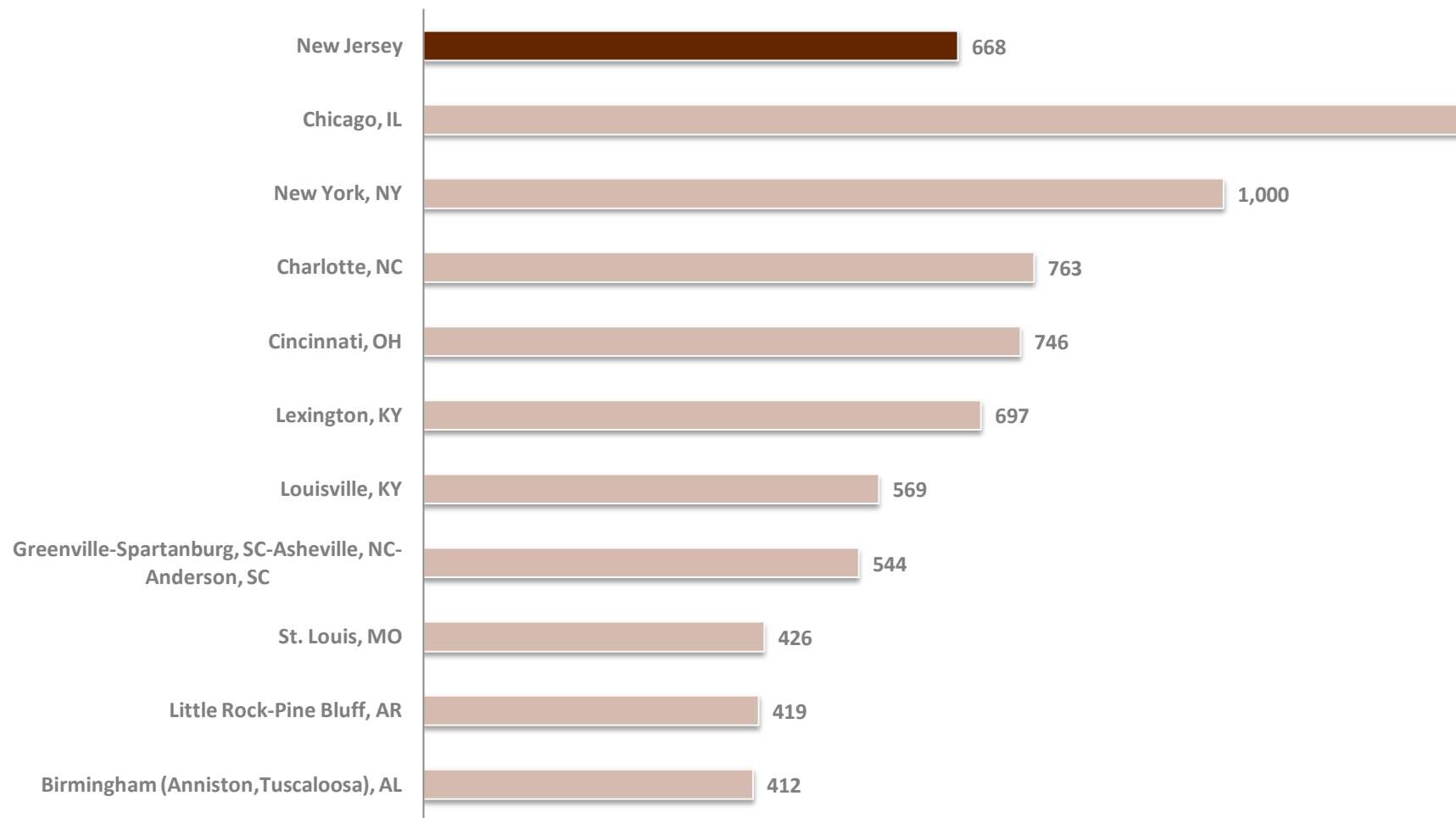


Chart 26 • Segment: 2011-2013 Overnight Leisure Stays (\$) • New Jersey N = 4,168 household count

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

TRIP ORIGIN

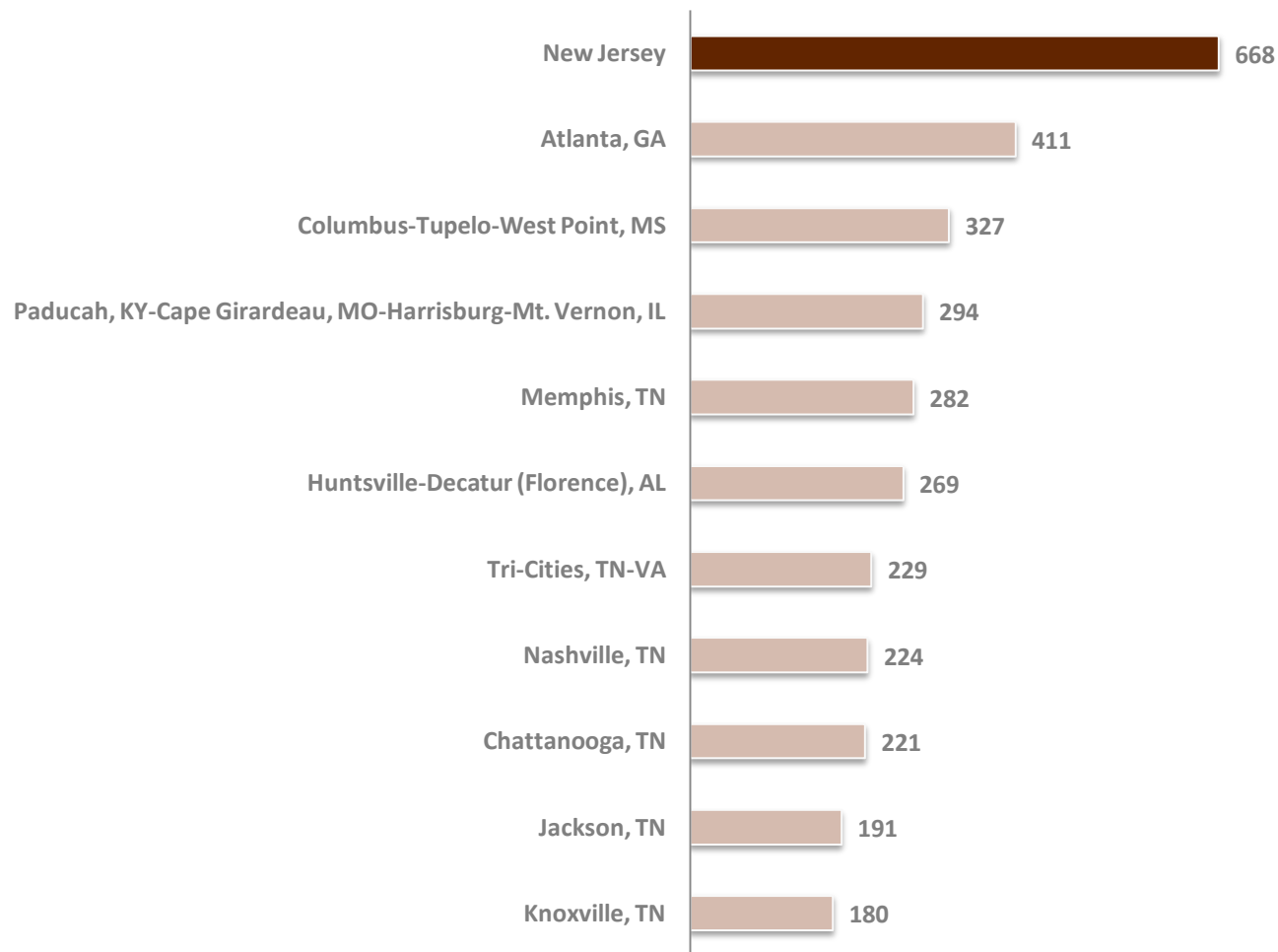


Chart 27 • Segment: 2011-2013 Overnight Leisure Stays (\$) • New Jersey N = 4,168 household count

New Jersey Origin DMA Comparison

TRIP ORIGIN

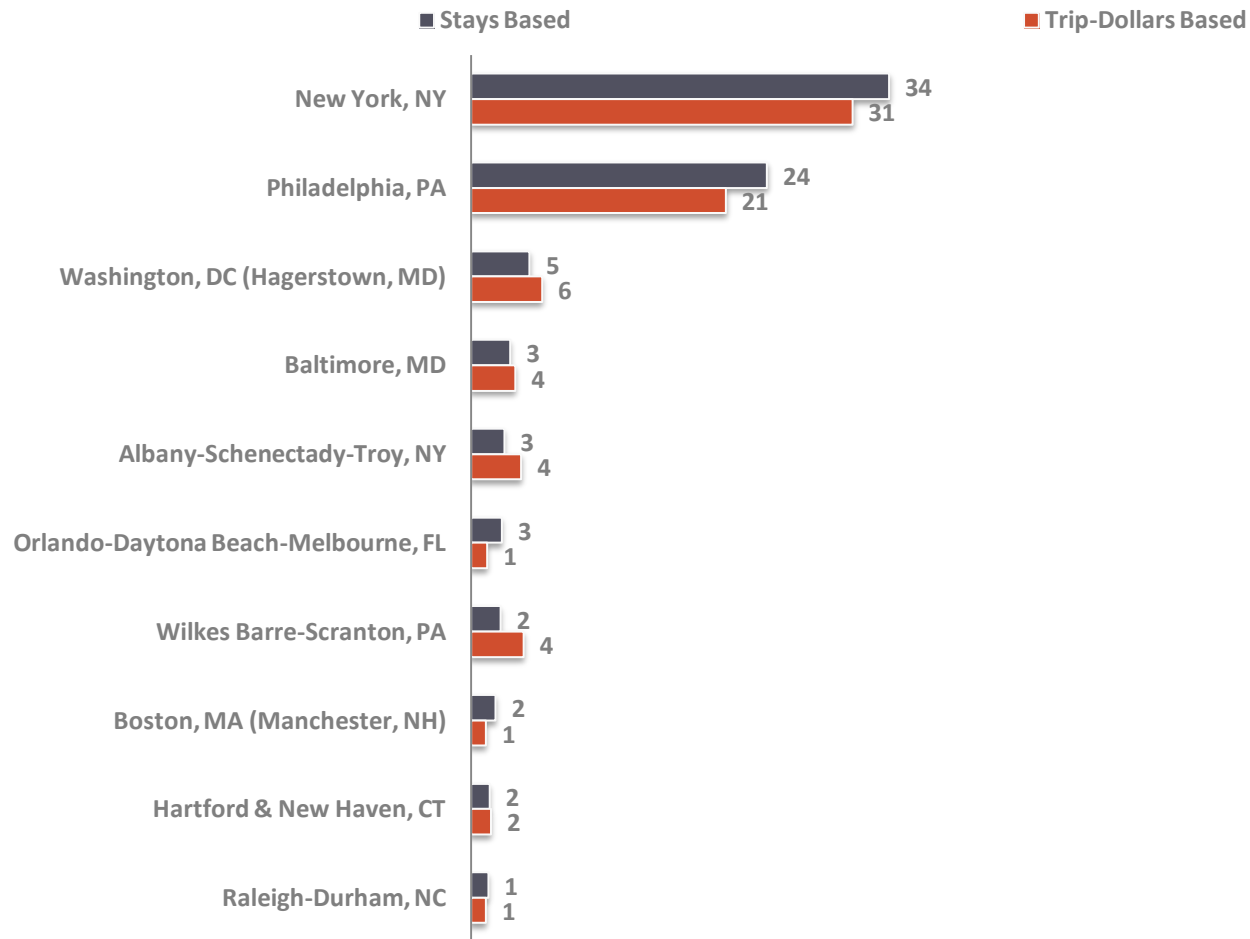


Chart 28 • Segment: 2011-2013 Overnight Leisure (%) • New Jersey N = 4,168 household count

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

TRANSPORTATION

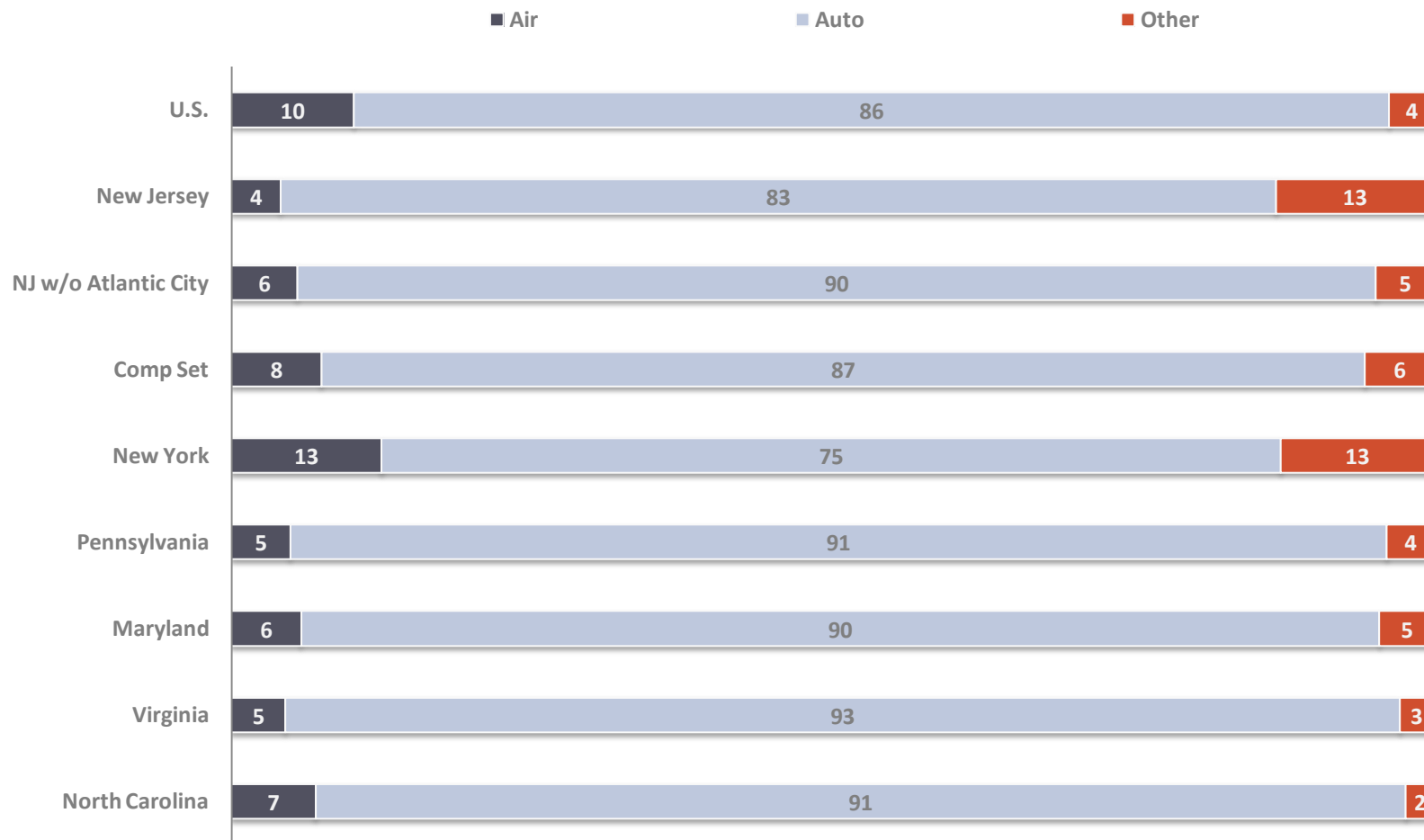


Chart 29 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,110 household count

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

TRANSPORTATION

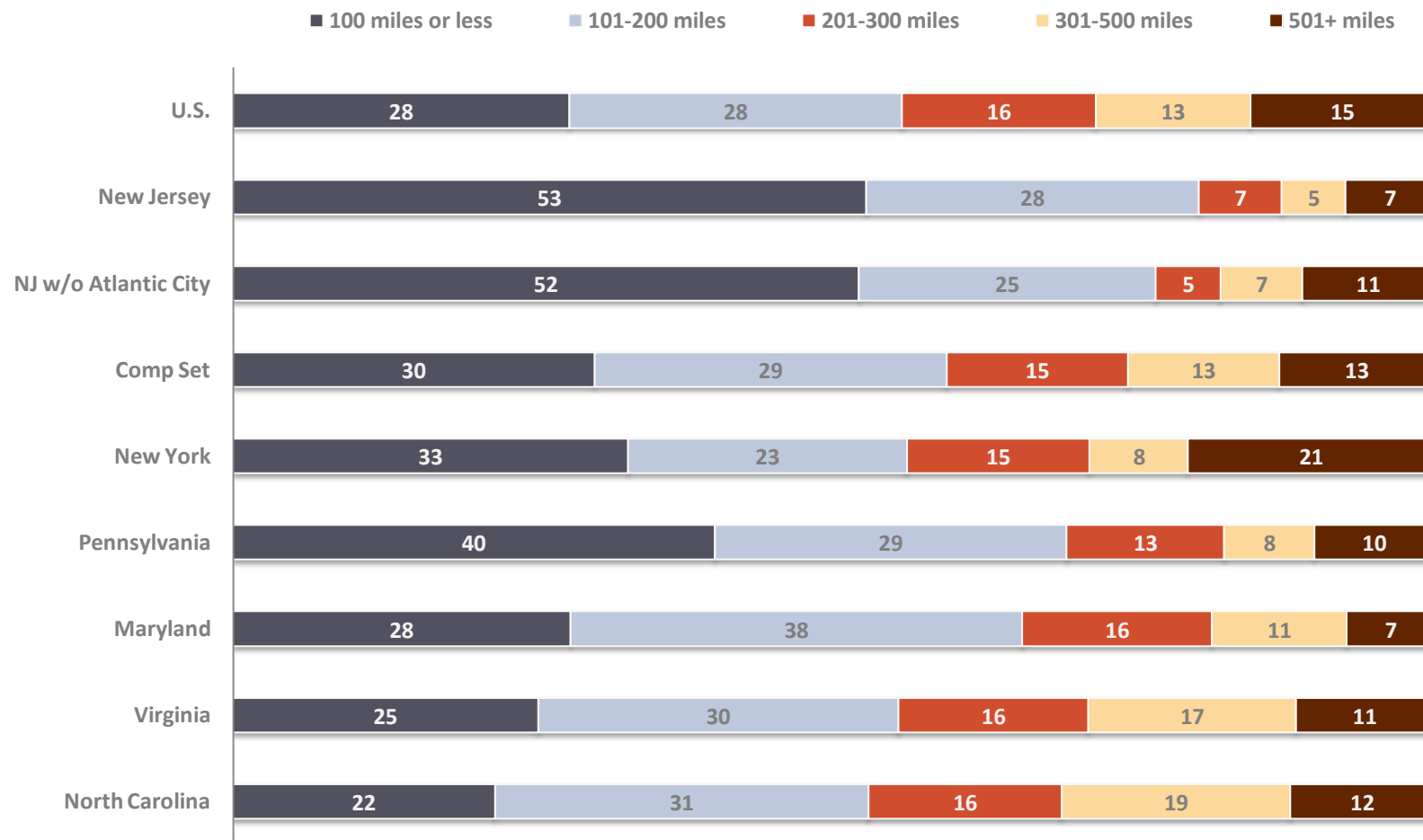


Chart 30 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 942 household count

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

TRANSPORTATION

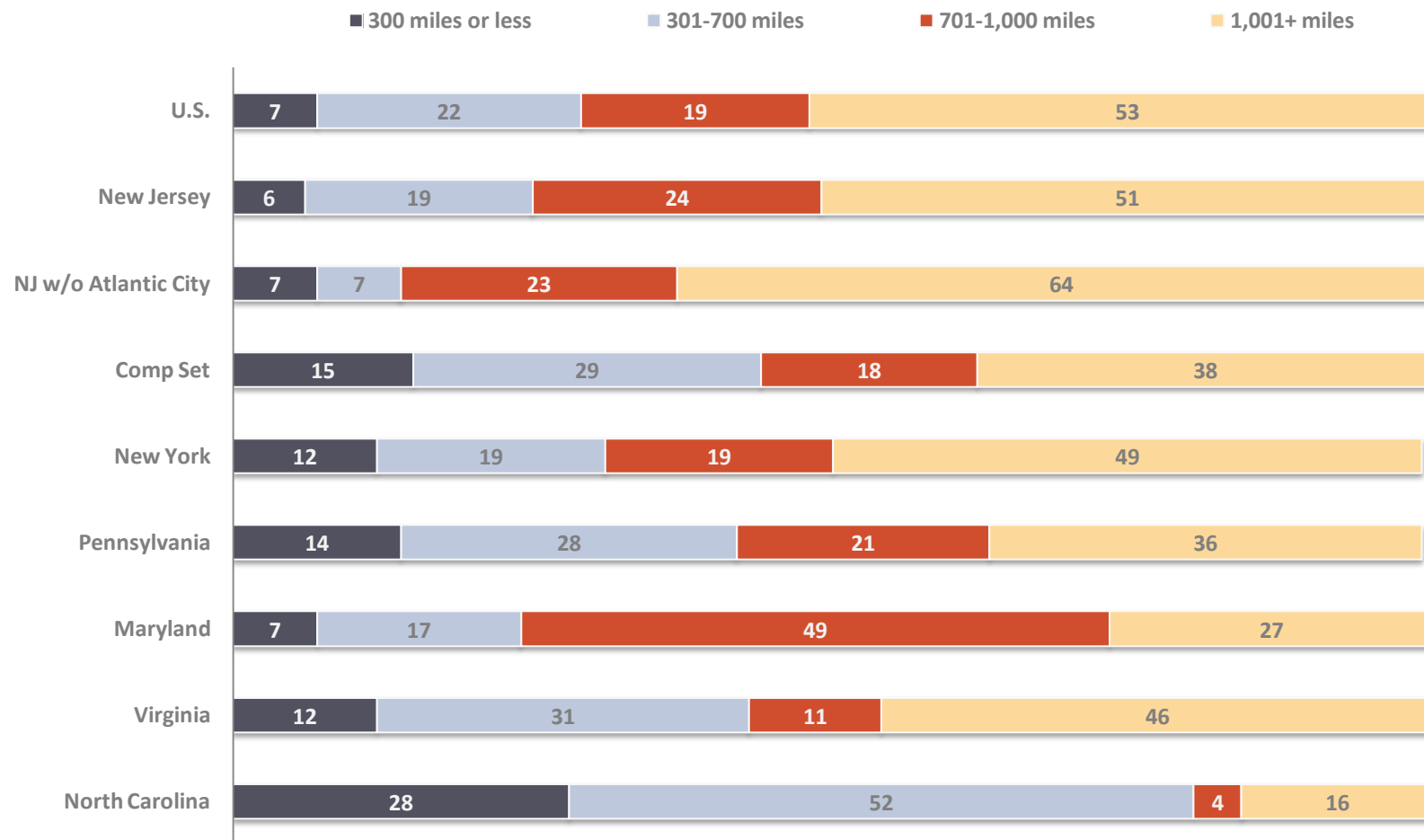


Chart 31 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 98 household count

New Jersey Month Trip Started

TRIP TIMING

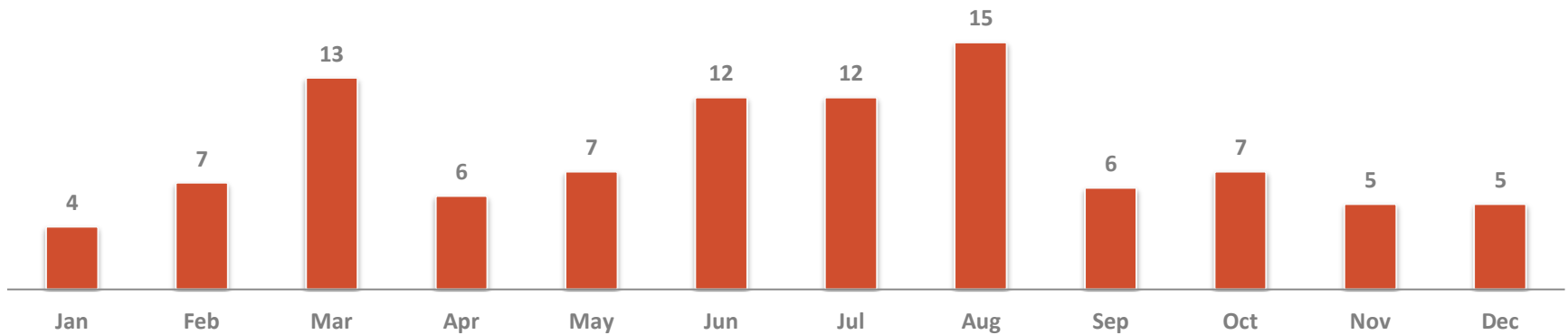


Chart 32 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,110 household count

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

TRIP TIMING

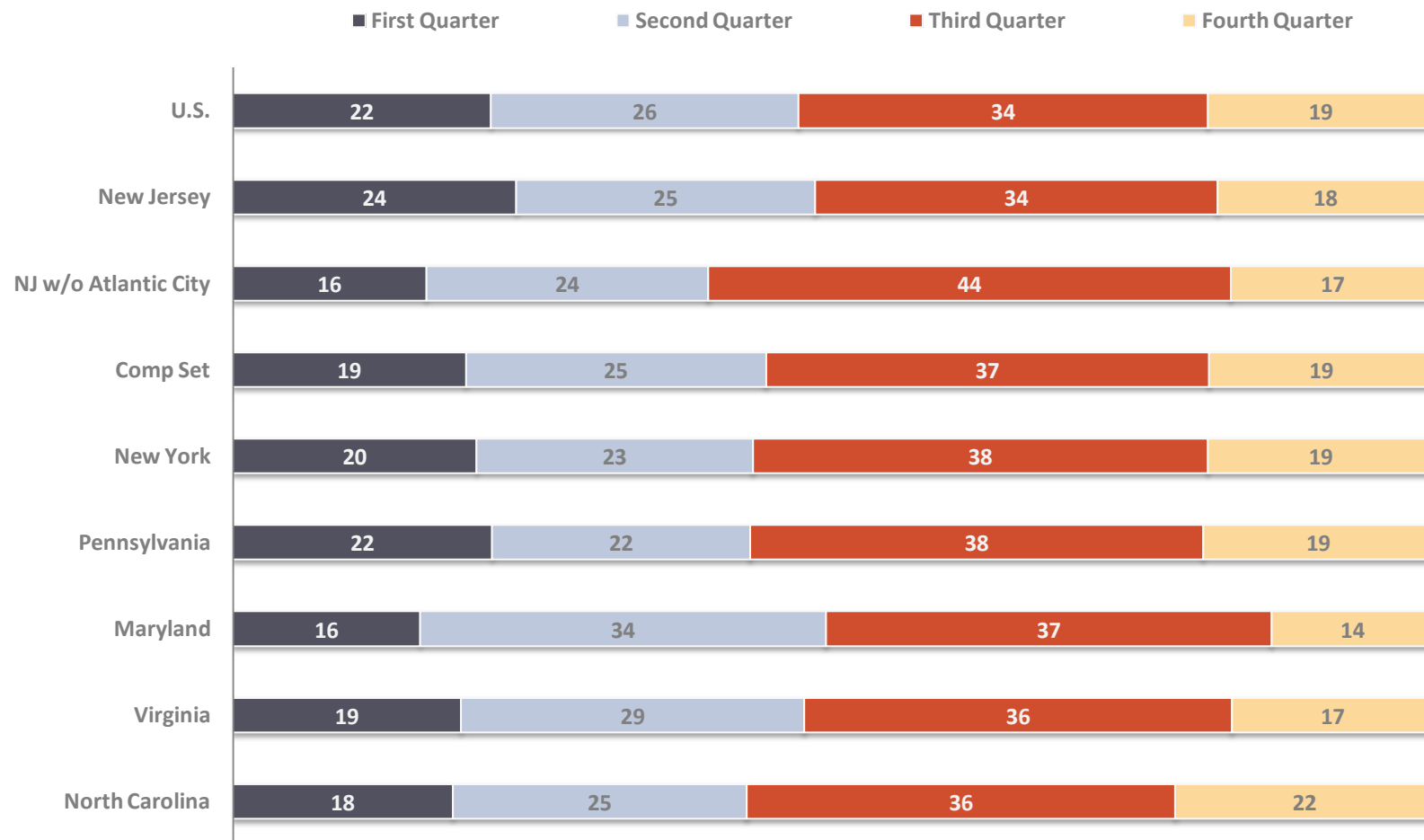


Chart 33 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,110 household count

New Jersey Avg. Party per Trip Spending by Quarter

TRIP TIMING

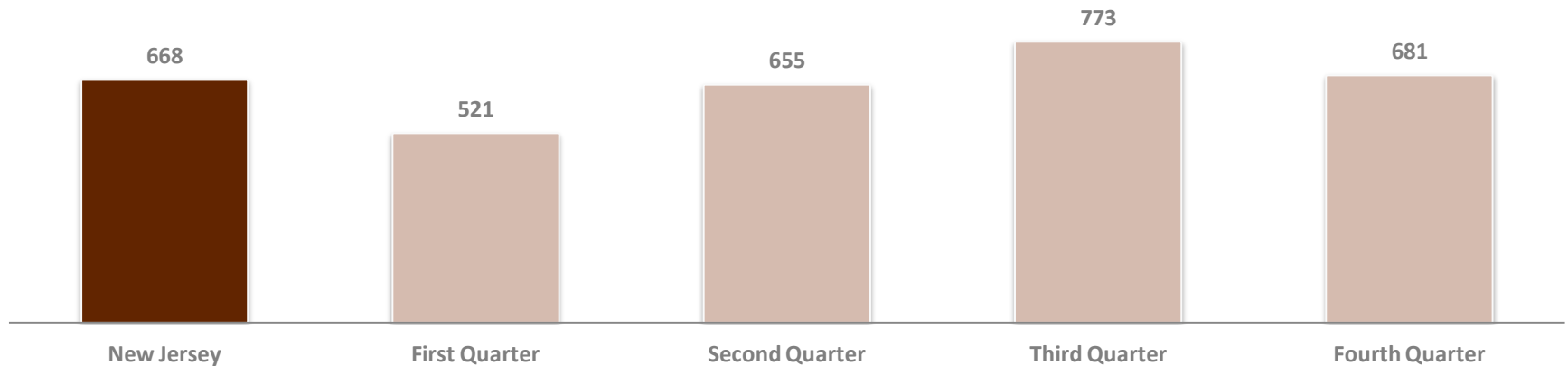


Chart 34 • Segment: 2011-2013 Overnight Leisure Stays (\$) • New Jersey N = 4,176 household count

New Jersey Trip Timing Comparison by Quarter

TRIP TIMING

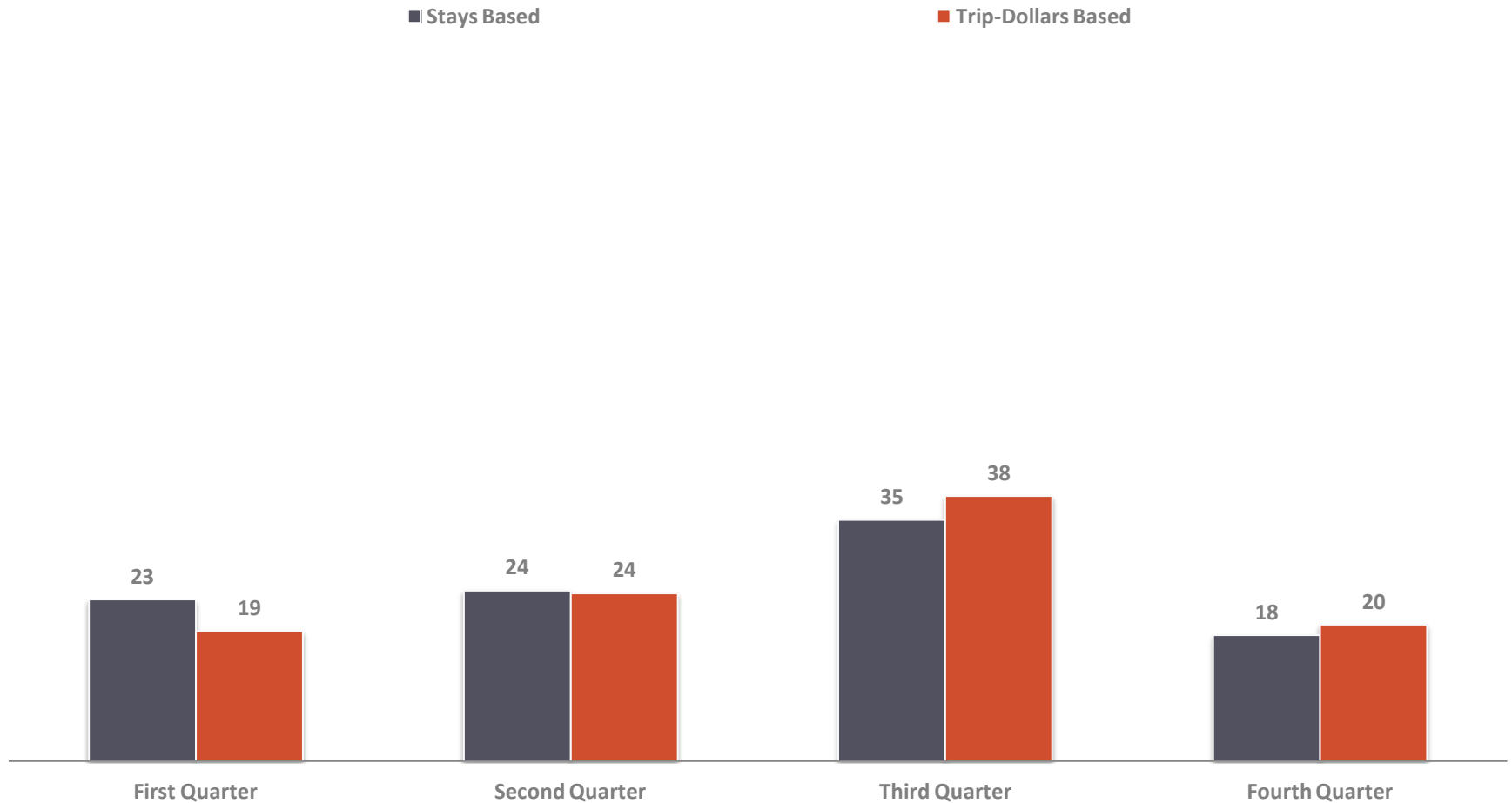


Chart 35 • Segment: 2011-2013 Overnight Leisure (%) • New Jersey N = 4,176 household count

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

TRIP TIMING

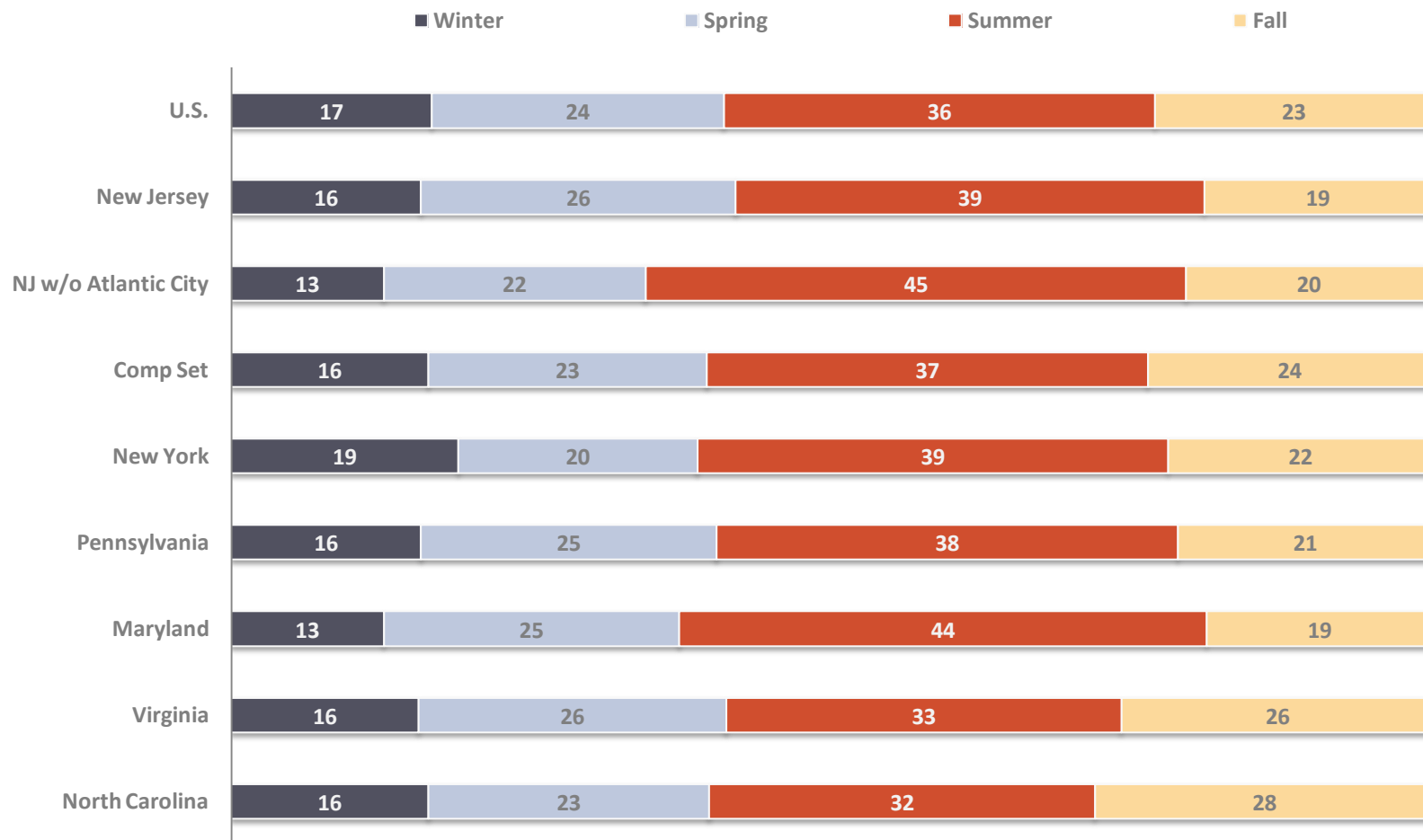


Chart 36 • Segment: 2011-2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,110 household count

New Jersey Avg. Party per Trip Spending by Season

TRIP TIMING

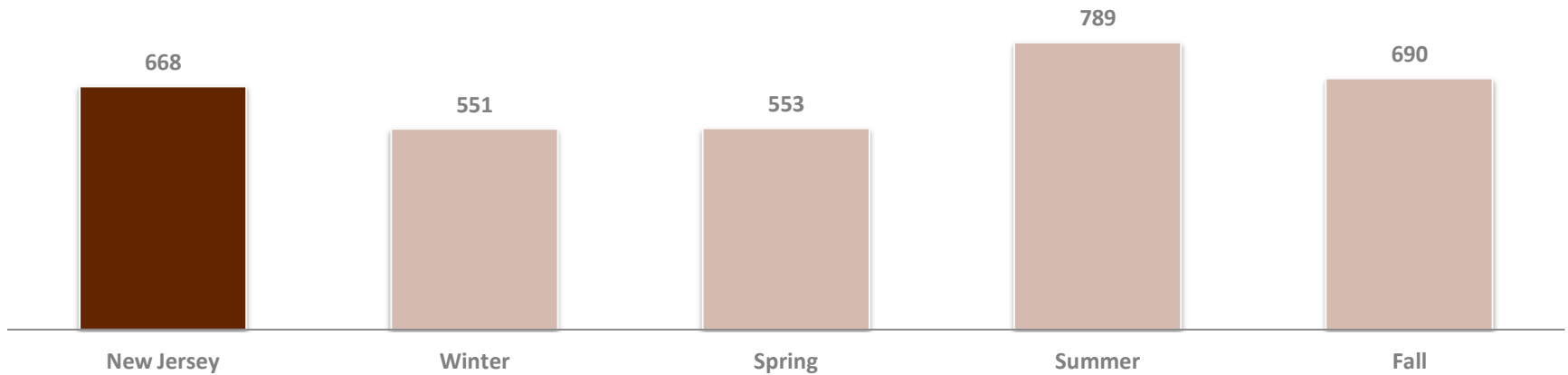


Chart 37 • Segment: 2011-2013 Overnight Leisure Stays (\$) • New Jersey N = 4,176 household count

New Jersey Trip Timing Comparison by Season

TRIP TIMING

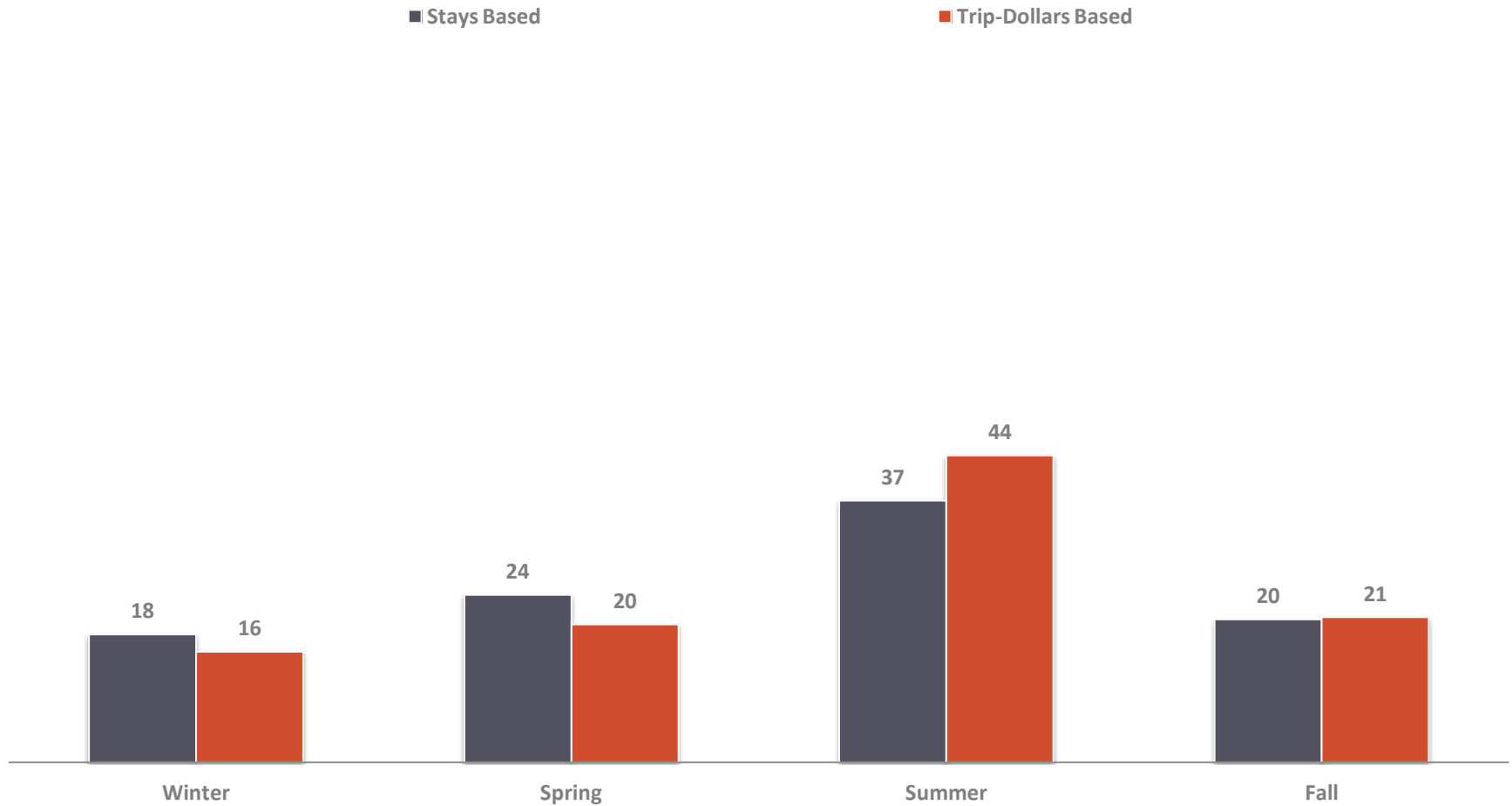


Chart 38 • Segment: 2011-2013 Overnight Leisure (%) • New Jersey N = 4,176 household count

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

TRIP CHARACTERISTICS

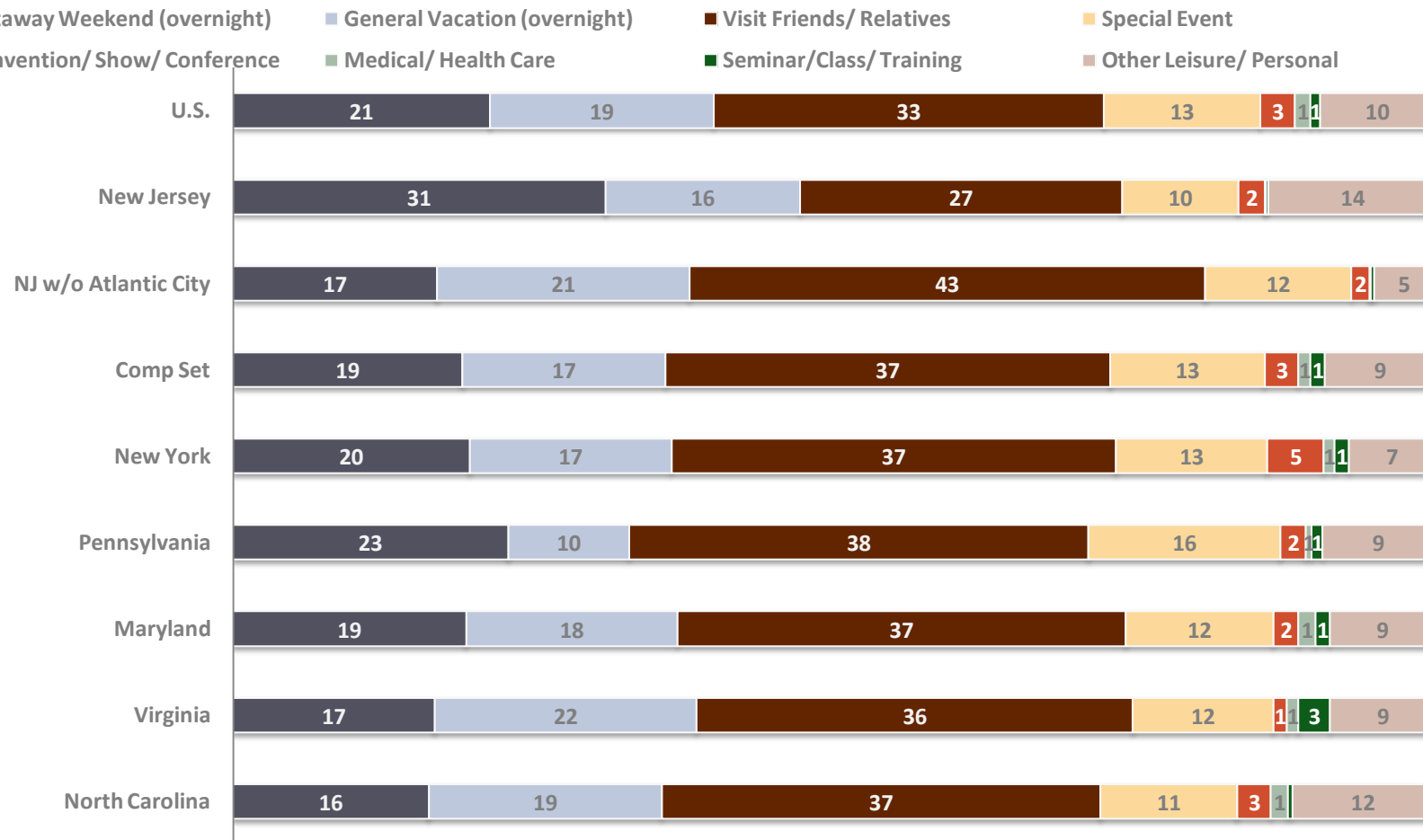


Chart 39 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,110 household count

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

TRIP CHARACTERISTICS

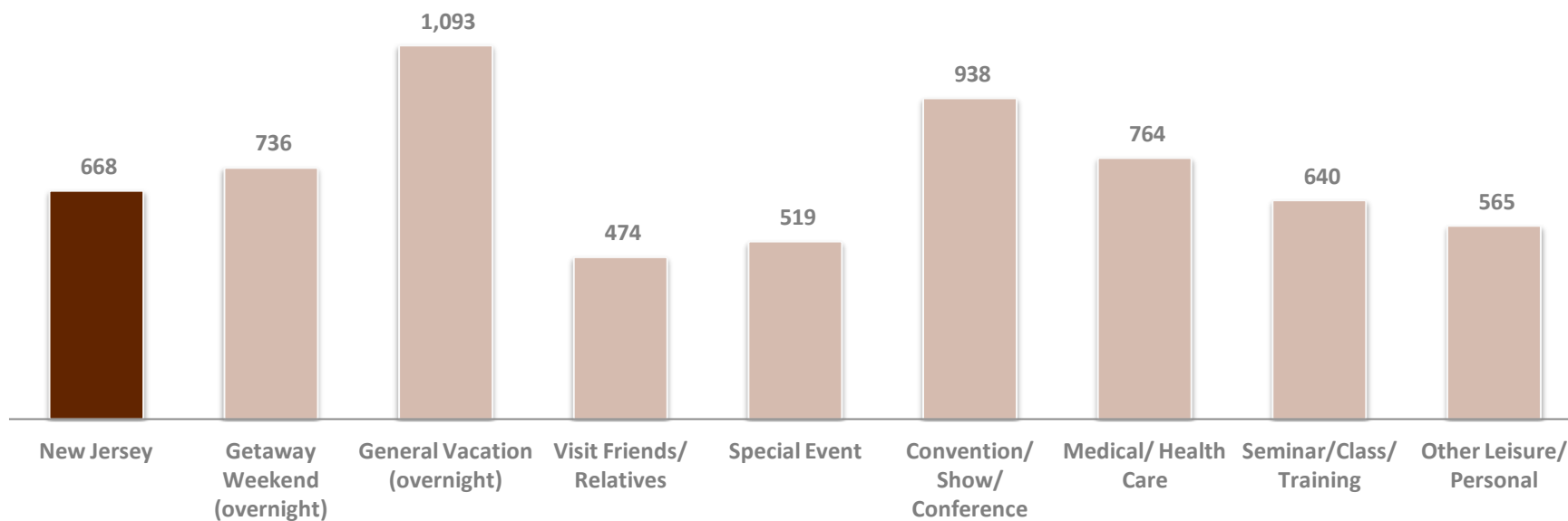


Chart 40 • Segment: 2011-2013 Overnight Leisure Stays (\$) • New Jersey N = 4,176 household count

New Jersey Purpose of Stay Comparison

TRIP CHARACTERISTICS

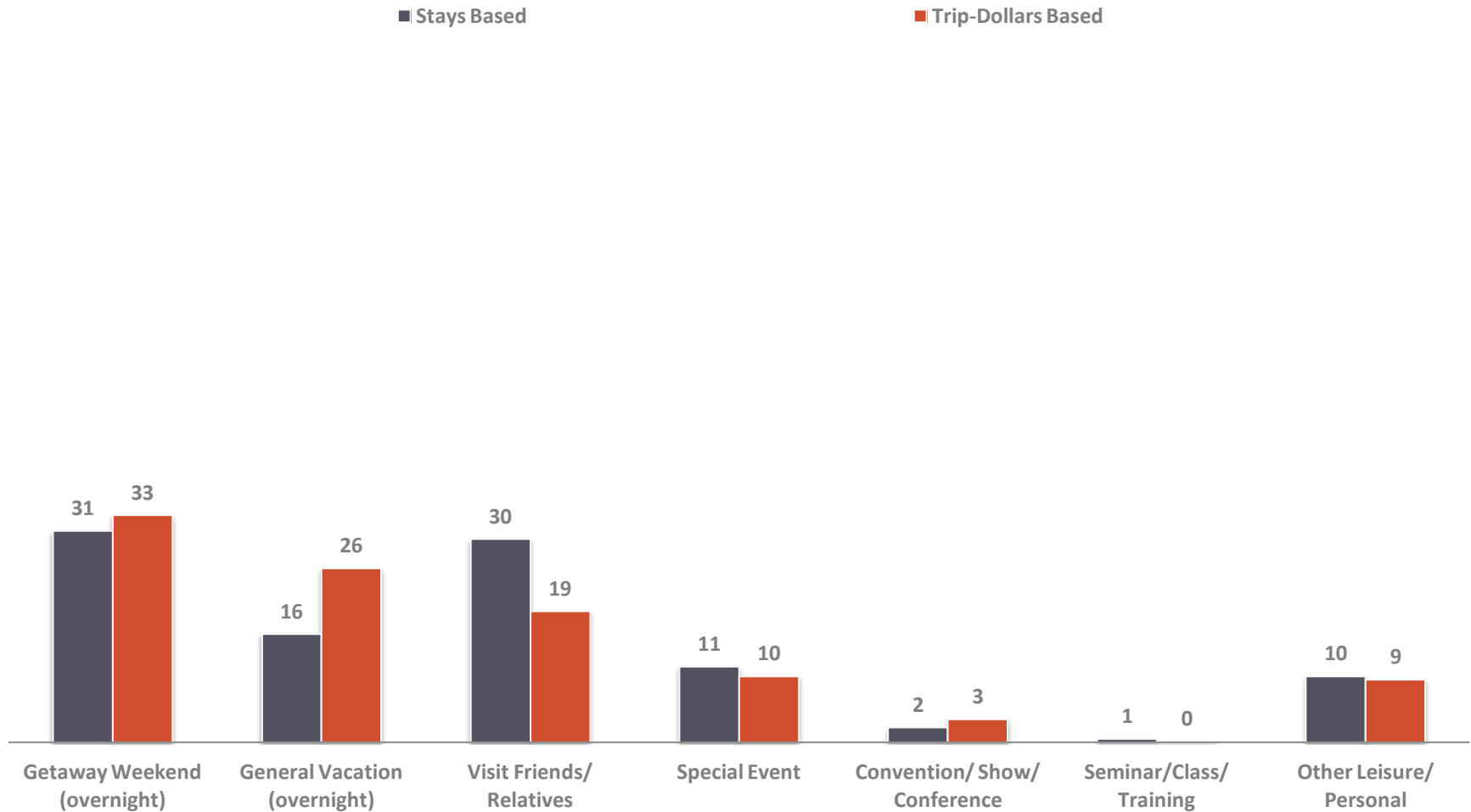


Chart 41 • Segment: 2011-2013 Overnight Leisure (%) • New Jersey N = 4,176 household count

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

TRIP CHARACTERISTICS

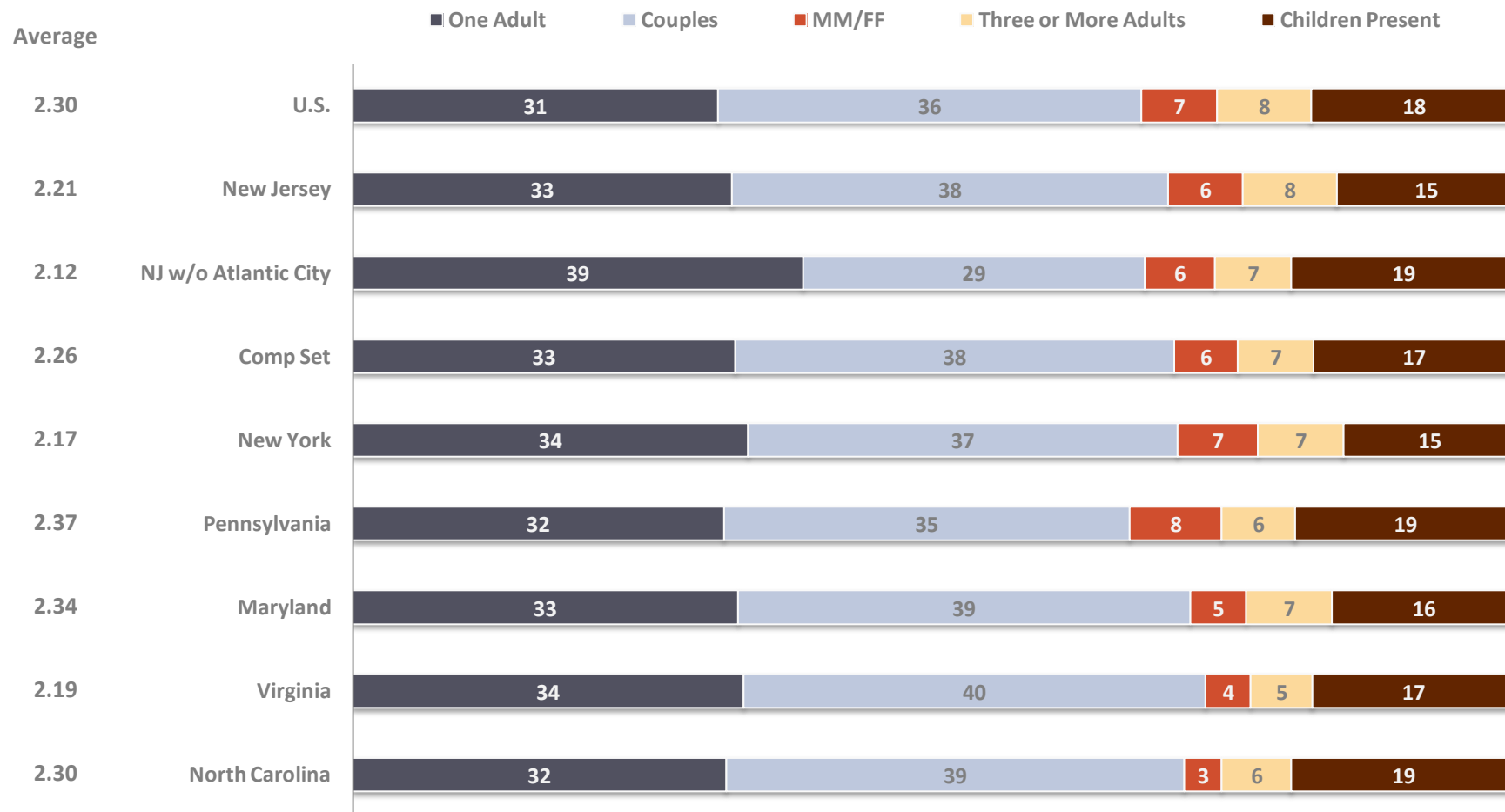


Chart 42 • Segment: 2013 Overnight Leisure Stays (%) • New Jersey N = 1,110 household count

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

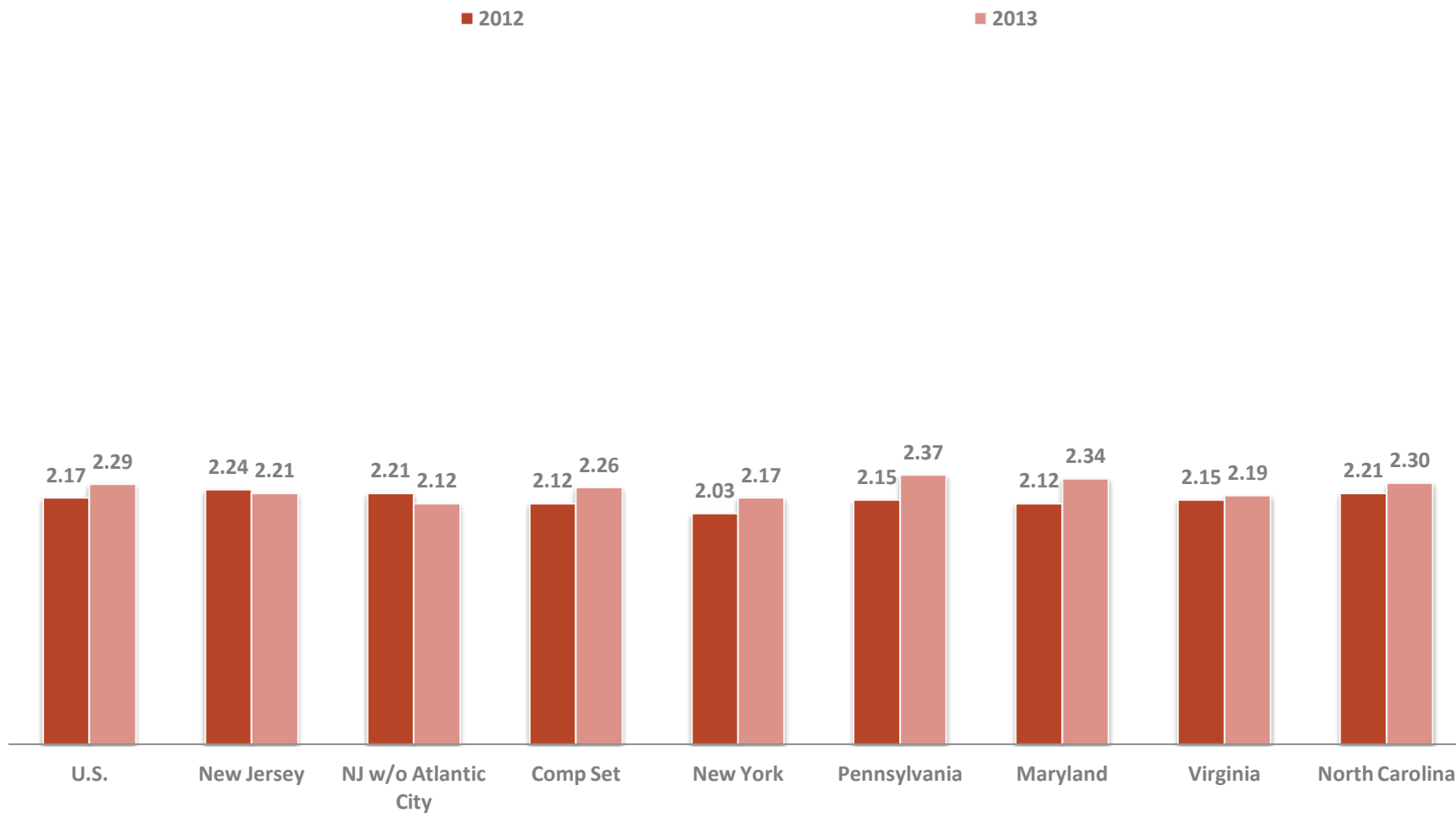


Chart 43 • Segment: 2012/2013 Overnight Leisure Stays • New Jersey N = 1,110 household count

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

TRIP CHARACTERISTICS

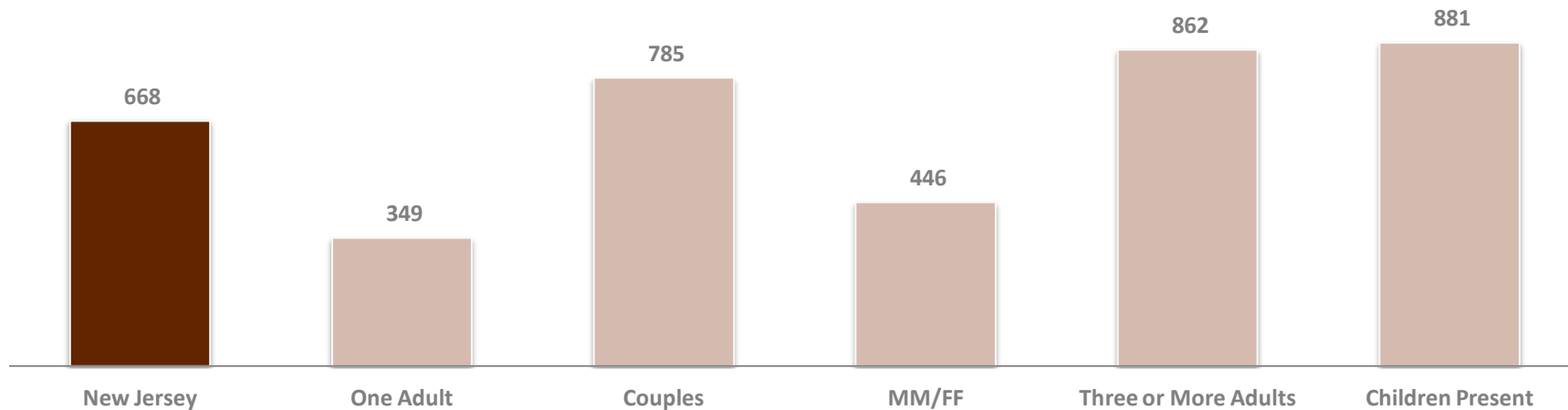


Chart 44 • Segment: 2011-2013 Overnight Leisure Stays (\$) • New Jersey N = 3,842 household count

New Jersey Travel Party Comparison

TRIP CHARACTERISTICS

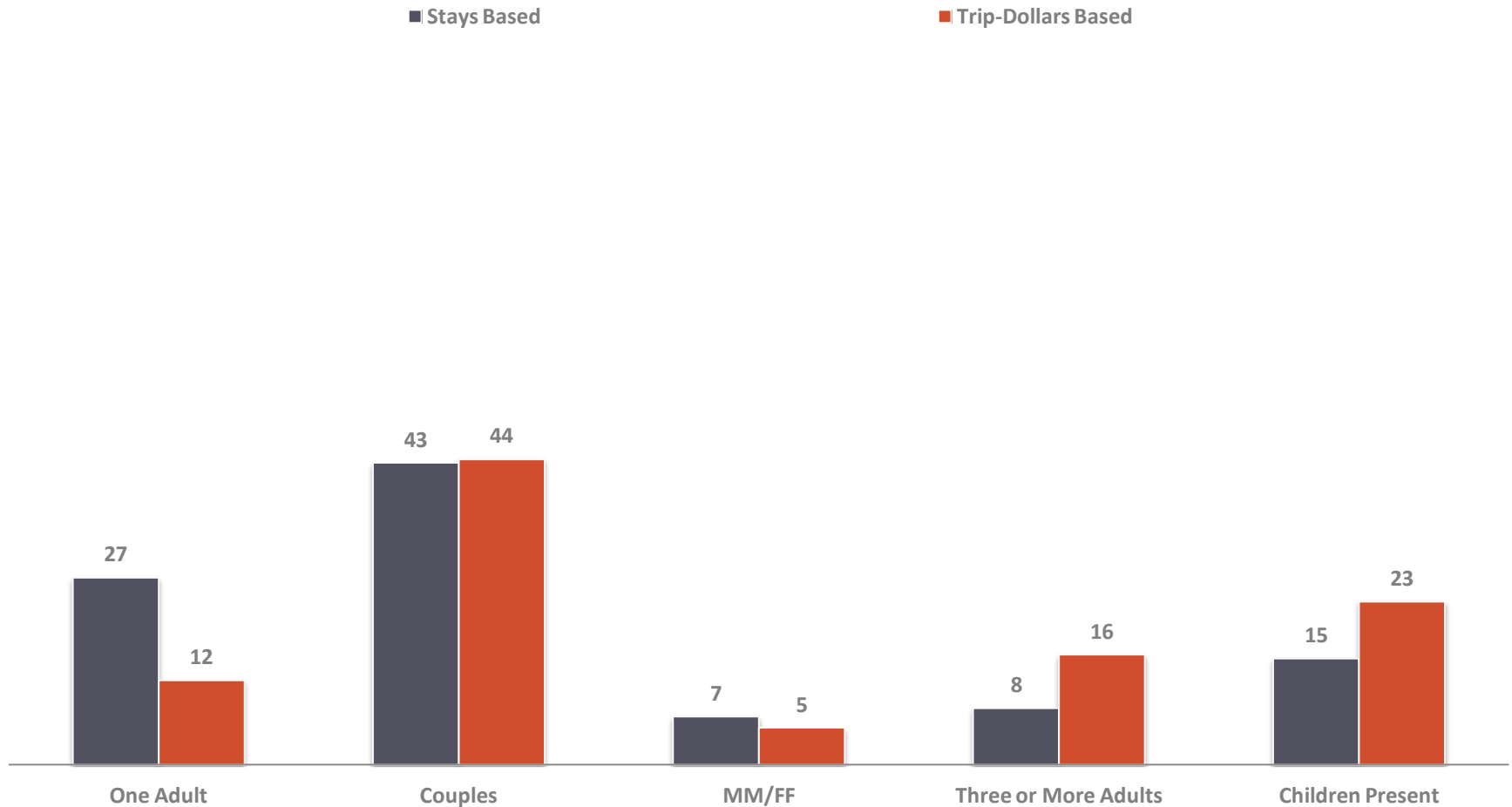


Chart 45 • Segment: 2011-2013 Overnight Leisure (%) • New Jersey N = 4,069 household count

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

TRIP CHARACTERISTICS

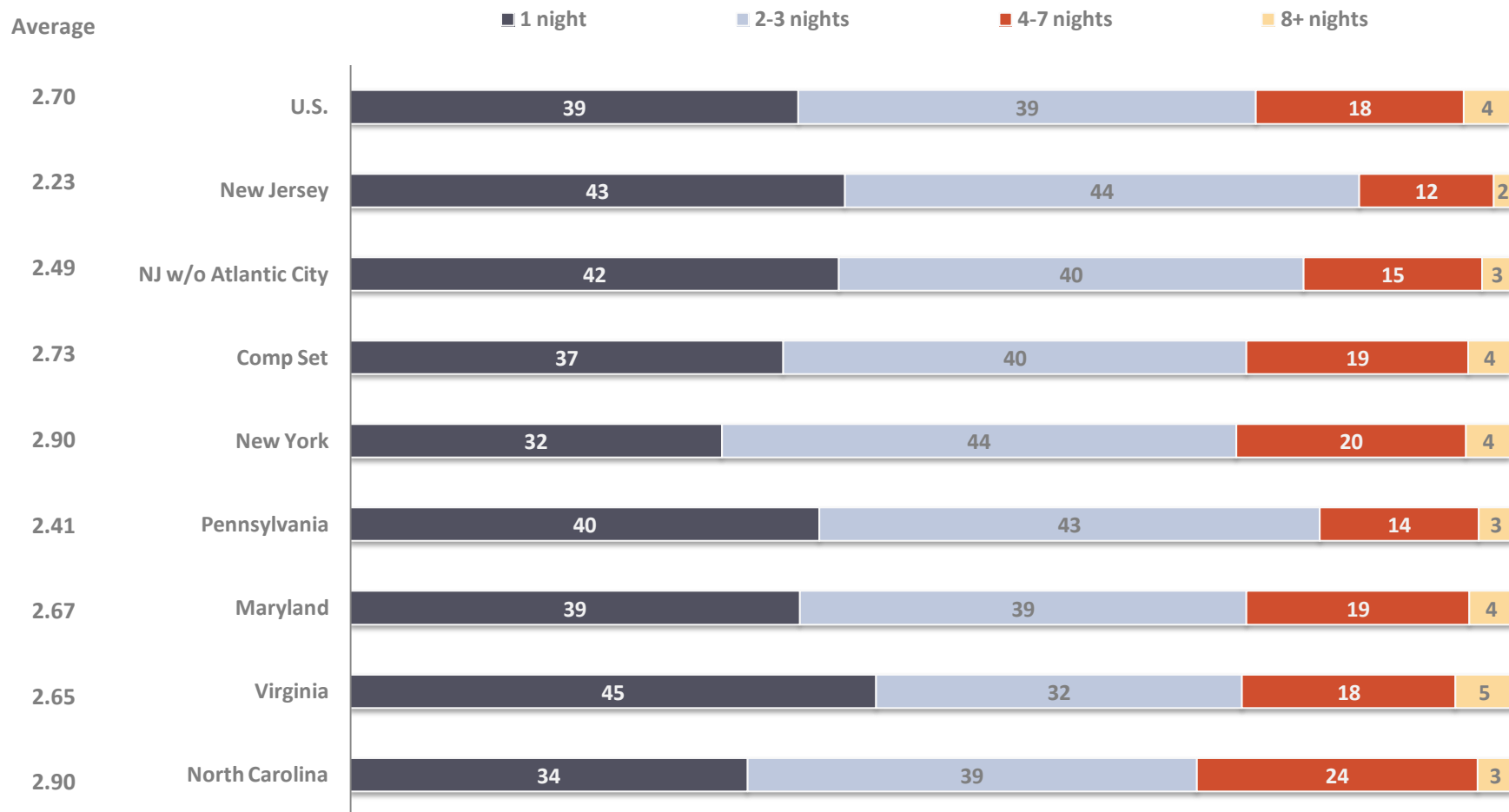


Chart 46 • Segment: 2013 Overnight Leisure Stays (%) • New Jersey N = 1,110 household count

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

TRIP CHARACTERISTICS

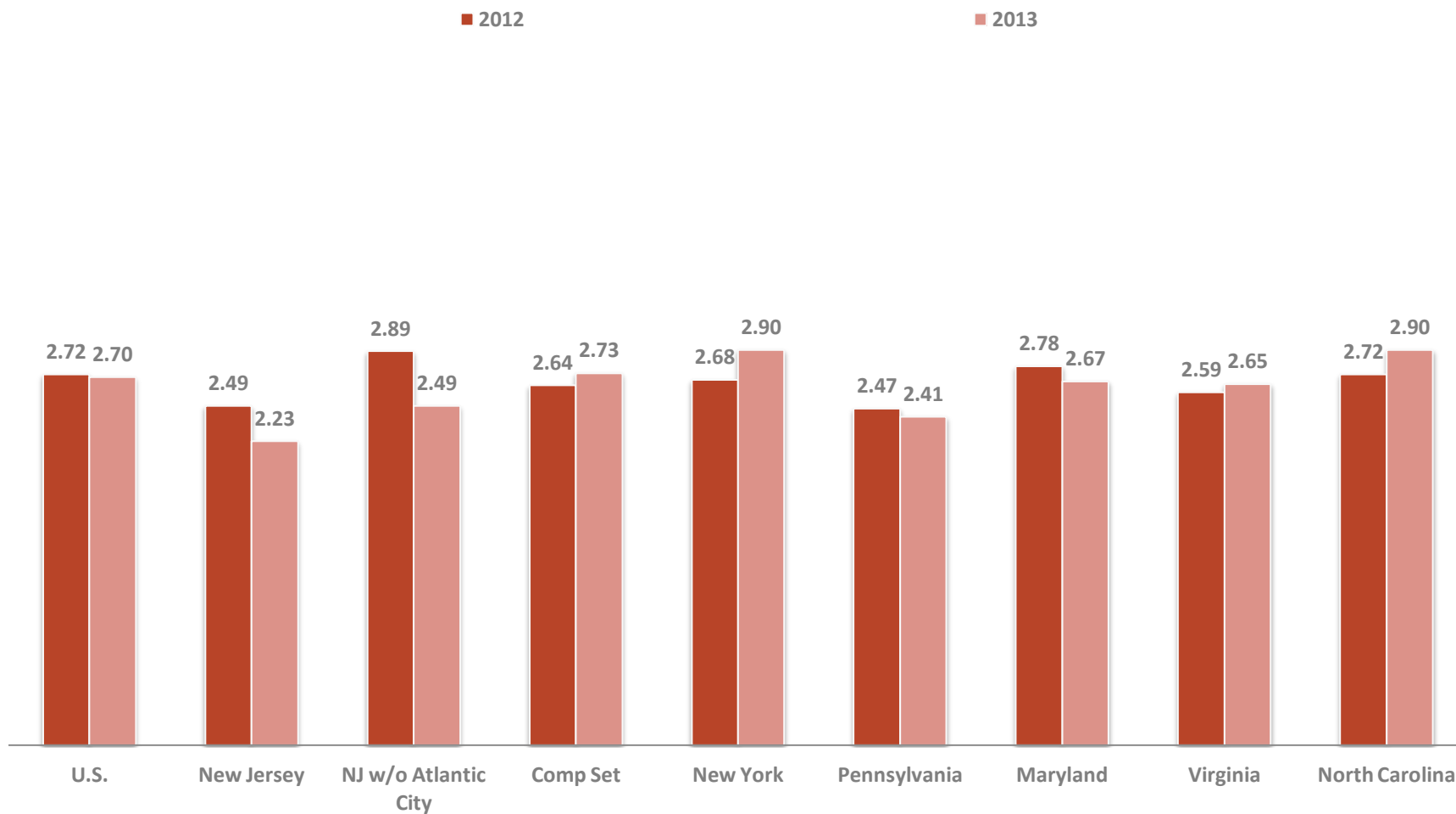


Chart 47 • Segment: 2012/2013 Overnight Leisure Stays • New Jersey N = 1,110 household count

New Jersey Avg. Party per Trip Spending by Stay Length

TRIP CHARACTERISTICS

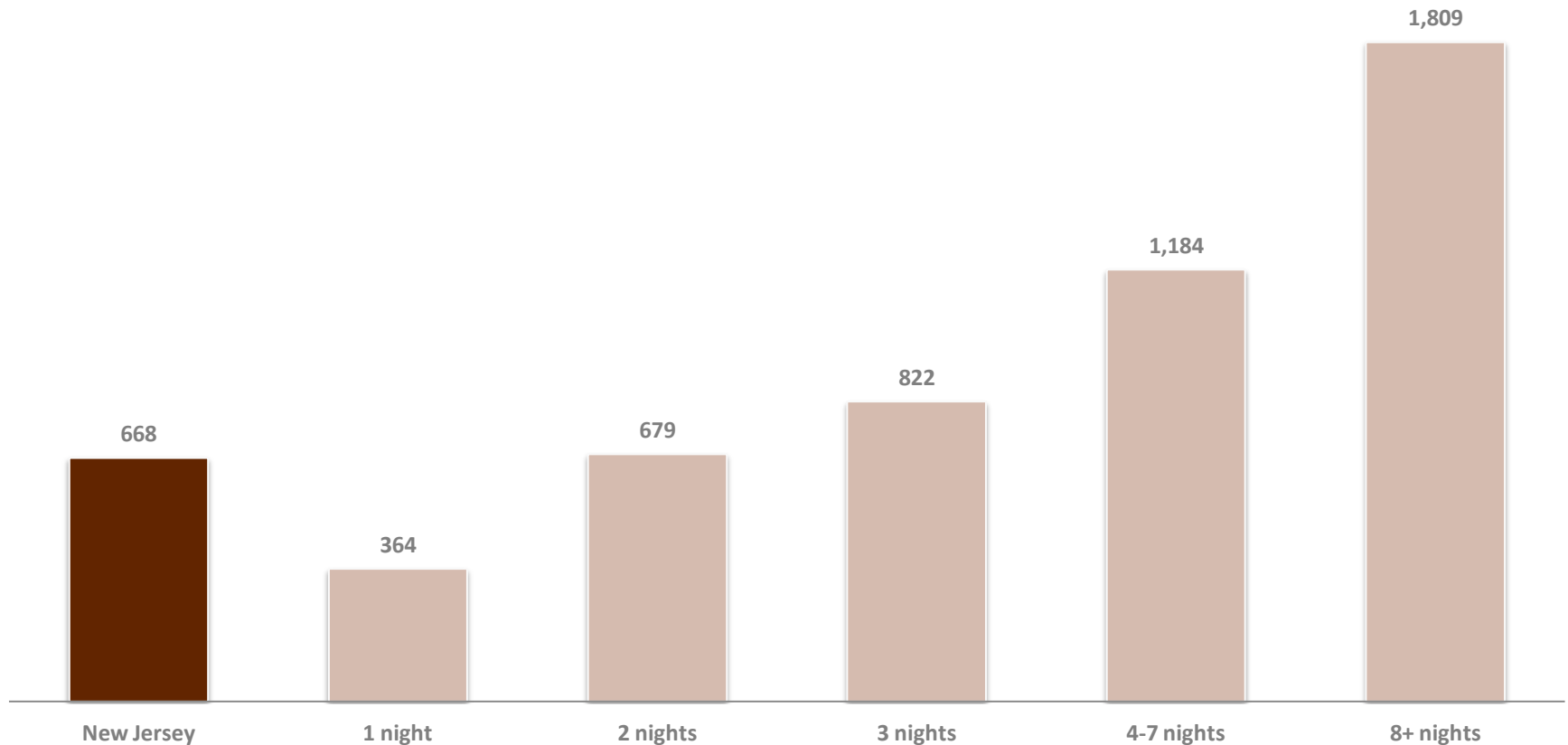


Chart 48 • Segment: 2011-2013 Overnight Leisure Stays (\$) • New Jersey N = 4,176 household count

New Jersey Stay Length Comparison

TRIP CHARACTERISTICS

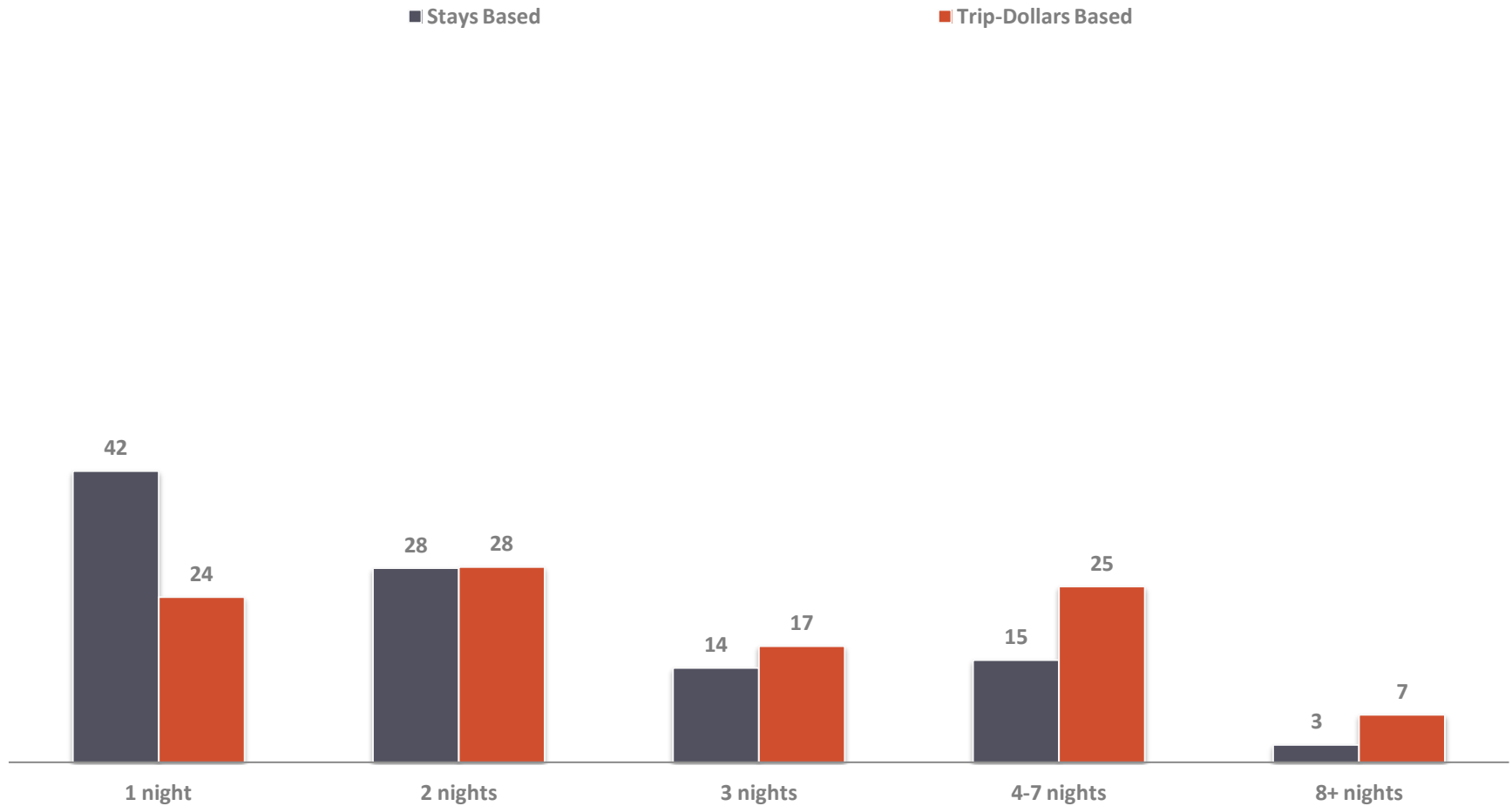


Chart 49 • Segment: 2011-2013 Overnight Leisure (%) • New Jersey N = 4,176 household count

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

TRIP CHARACTERISTICS

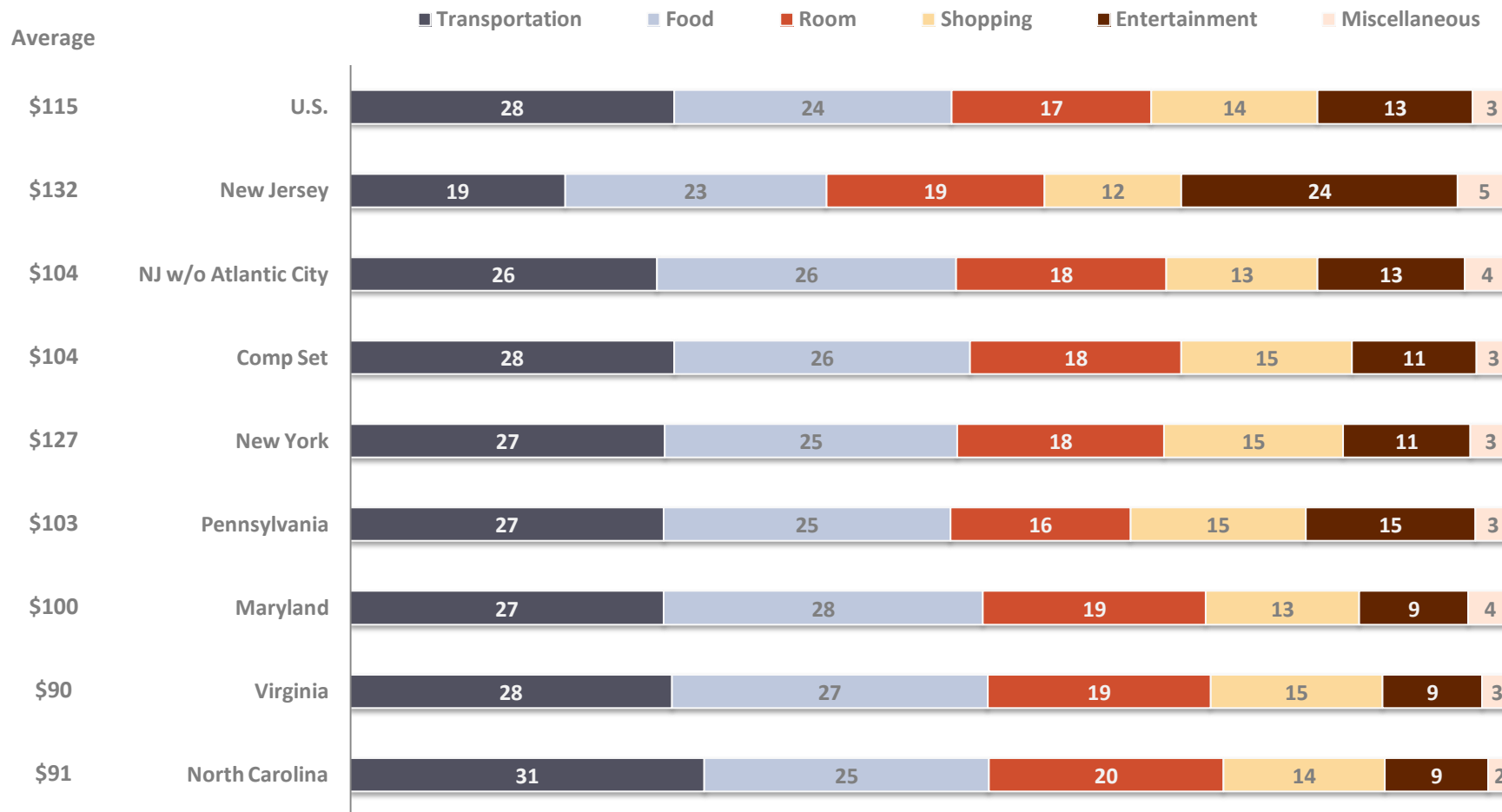


Chart 50 • Segment: 2013 Overnight Leisure Person-Days (%) • New Jersey N = 1,051 household count

List of All DKSA Activities

ACTIVITY PARTICIPATION

DKSA 2013 ACTIVITIES (YEAR STARTED IN QUESTIONNAIRE)		
Attractions	Personal Special Event (2013+)	Hunting (2012+)
Amateur Sports (2012+)	Holiday Celebration (2012+)	Fishing (2012+)
Professional Sports Event (2012+)	Reunion/Graduation (2012+)	Hiking (2012+)
Gambling	Wedding (2012+)	Biking (2012+)
Night Life	Funeral/Memorial (2012+)	Tennis (2012+)
Show: Boat, Car, Home (not available 2011/12)	Libation and Culinary	Water Sports (2012+)
Theme/Water Park	Culinary/Dining Experience (2012+)	Extreme Adventure Sports
Zoo/Aquarium (2012+)	Winery/Distillery/Brewery (2012+)	Snow/Winter Sports
Culture	Nature	General
Concert, Theater, Dance	Beach/Waterfront	Shopping (2012+)
Festival/Fairs	Camping	Real Estate (buy/sell)
Museum, Art Exhibits, etc.	Eco/Sustainable Travel (2012+)	Medical/Health/Doctor Visit (2012+)
Movies (2012+)	Wildlife Viewing (2012+)	Service/Volunteerism/Charity (2012+)
Historic Sites (2013+)	Parks (National/State)	Religious/Faith Based Event (2012+)
Touring/Sightseeing	Outdoor Sports	Spa (2012+)
Family/Life Events	Boating/Sailing	Business (2013+)
Visit Friends/Relatives (2012+)	Golfing	Other Activities (any) (2012+)

New Jersey Activity Participation

ACTIVITY PARTICIPATION

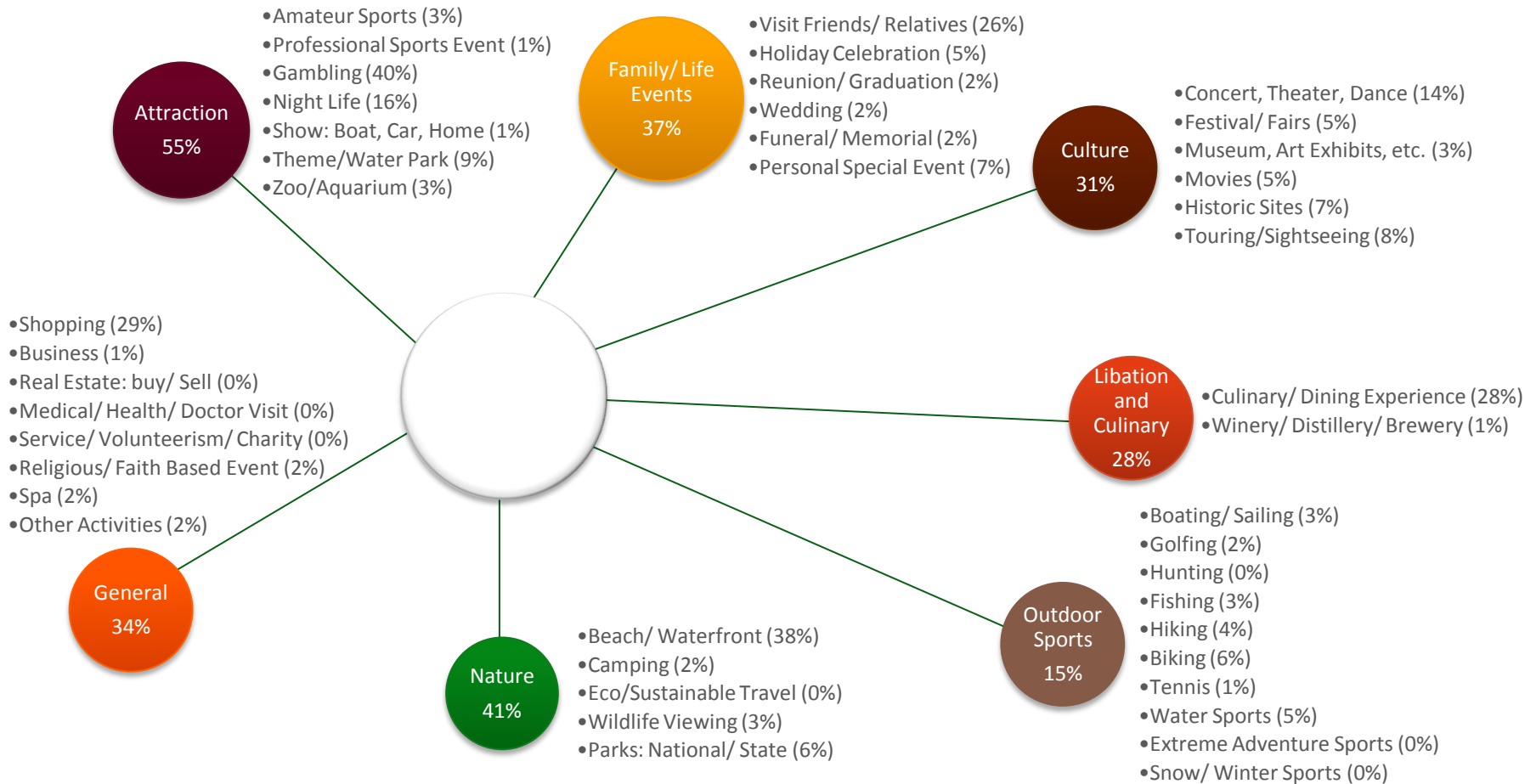


Chart 51 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,110 household count

Top Activities at the Destination

ACTIVITY PARTICIPATION

	U.S.	New Jersey	New Jersey w/o Atlantic City	New York	Pennsylvania	Maryland	Virginia	North Carolina
Gambling (slots, cards, horses, etc.)	9%	40%	7%	5%	7%	4%	0%	4%
Beach/Waterfront	19%	38%	36%	13%	7%	31%	14%	19%
Shopping	29%	29%	24%	36%	26%	28%	22%	29%
Culinary/Dining Experience	30%	28%	26%	32%	24%	31%	27%	27%
Visit Friends/Relatives (general visit)	33%	26%	39%	37%	34%	41%	34%	37%
Nightlife (bar, nightclub, etc.)	11%	16%	8%	13%	7%	10%	5%	7%
Concerts/Theatre/Dance etc.	9%	14%	8%	13%	11%	9%	5%	6%
Theme/Amusement/Water Parks	7%	9%	12%	2%	8%	4%	7%	4%
Touring/Sightseeing	17%	8%	11%	21%	12%	19%	18%	17%
Historic Sites	13%	7%	10%	17%	17%	15%	22%	14%
Personal Special Event (FY13+)	9%	7%	7%	8%	11%	10%	8%	9%
Biking	3%	6%	9%	4%	4%	2%	1%	3%
Parks (national/state, etc.)	14%	6%	9%	19%	14%	11%	17%	12%
Water Sports	4%	5%	7%	3%	3%	3%	2%	4%
Holiday Celebration (Thanksgi., July 4th etc.)	7%	5%	8%	8%	9%	6%	6%	9%
Movies	8%	5%	6%	10%	7%	6%	7%	6%
Festivals/Fairs (state, craft, etc.)	6%	5%	7%	6%	6%	8%	7%	5%
Hiking	8%	4%	6%	7%	8%	4%	7%	8%
Boating/Sailing	4%	3%	5%	4%	4%	7%	2%	2%
Zoo/Aquarium	5%	3%	4%	3%	3%	5%	3%	2%
Museums, Art Exhibits etc.	11%	3%	4%	17%	12%	15%	12%	7%
Fishing	5%	3%	4%	4%	3%	4%	3%	6%

Chart 52 • Segment: 2013 Overnight Leisure Stays (%) • New Jersey N = 1,110 household count

Top Activities at the Destination

ACTIVITY PARTICIPATION

	U.S.	New Jersey	New Jersey w/o Atlantic City	New York	Pennsylvania	Maryland	Virginia	North Carolina
Wildlife Viewing (birds, whales, etc.)	6%	3%	4%	4%	3%	5%	4%	4%
Amateur Sports (attend/participate)	4%	3%	4%	4%	3%	3%	3%	4%
Funeral/Memorial	2%	2%	4%	3%	3%	2%	1%	4%
Camping	5%	2%	4%	5%	4%	9%	1%	5%
Golfing	3%	2%	3%	3%	3%	3%	4%	2%
Spa	2%	2%	1%	1%	2%	1%	1%	1%
Wedding	3%	2%	3%	4%	4%	3%	4%	4%
Religious/Faith Based Conference	2%	2%	3%	2%	4%	3%	3%	1%
Reunion/Graduation	4%	2%	3%	4%	3%	4%	4%	4%
Other	3%	2%	2%	2%	3%	2%	2%	3%
Winery/Distillery/Brewery Tours	3%	1%	1%	3%	4%	3%	2%	2%
Show: Boat, Car, Home (FY13)	2%	1%	1%	2%	2%	2%	3%	3%
Professional Sports Event	3%	1%	1%	3%	3%	2%	4%	1%
Business (FY13+)	1%	1%	1%	0%	0%	0%	0%	0%
Tennis	1%	1%	1%	1%	1%	1%	1%	1%
Medical/Health/Doctor Visit	2%	0%	0%	2%	1%	1%	1%	3%
Service/Volunteerism/Charity	1%	0%	0%	1%	1%	0%	1%	2%
Extreme/Adventure Sports	1%	0%	0%	1%	1%	0%	1%	0%
Real Estate (buy/sell)	1%	0%	0%	1%	1%	0%	1%	1%
Snow/Winter Sports	1%	0%	0%	1%	1%	3%	1%	1%
Eco/Sustainable Travel	1%	0%	0%	1%	1%	0%	1%	1%
Hunting	1%	0%	0%	1%	1%	1%	0%	1%

Chart 53 • Segment: 2013 Overnight Leisure Stays (%) • New Jersey N = 1,110 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.

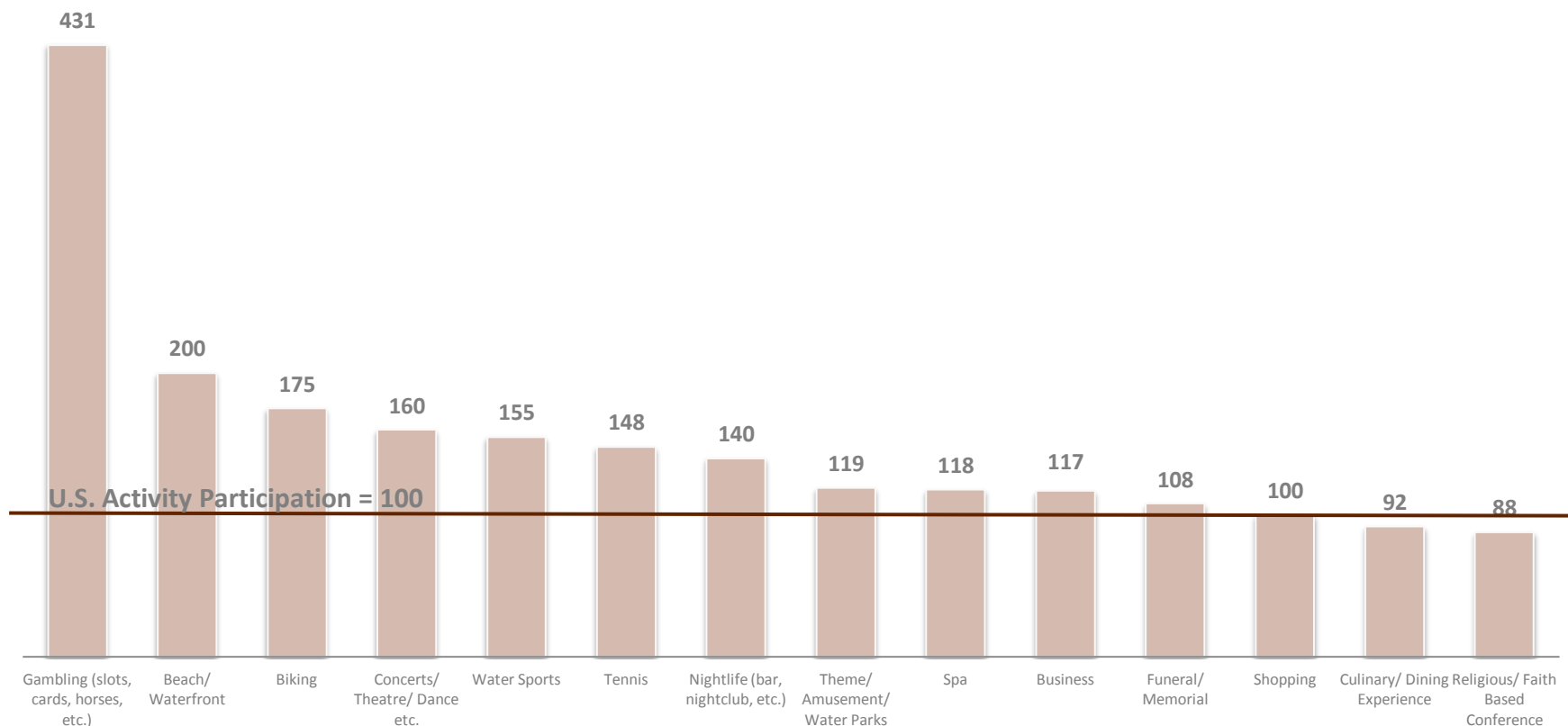


Chart 54 • Segment: 2013 Overnight Leisure Person-Stays • New Jersey N = 1,110 household count

New Jersey Avg. Party per Trip Spending by Activities

ACTIVITY PARTICIPATION

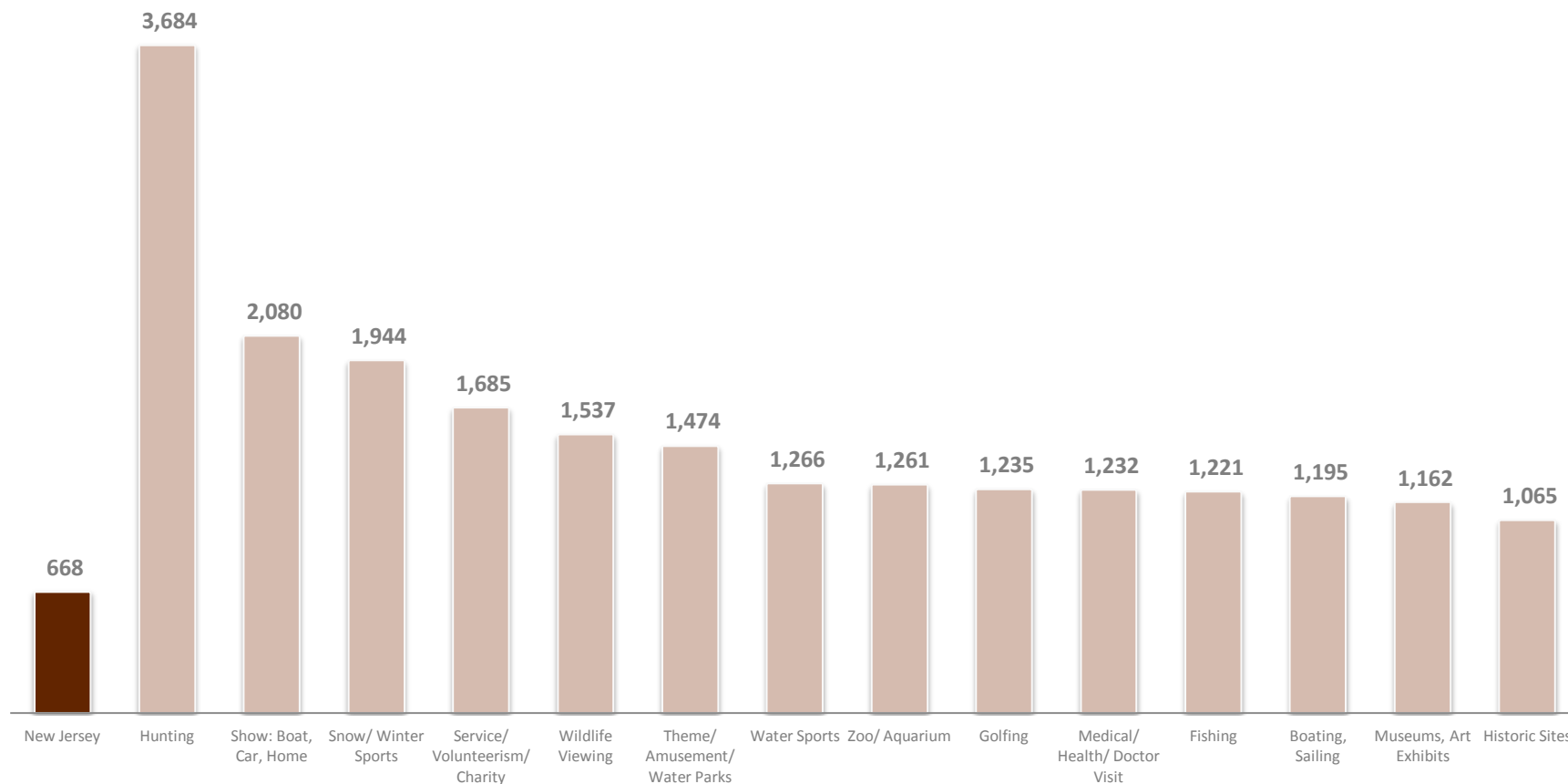


Chart 55 • Segment: 2011-2013 Overnight Leisure Stays (\$) • New Jersey N = 3,941 household count

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

ACTIVITY PARTICIPATION

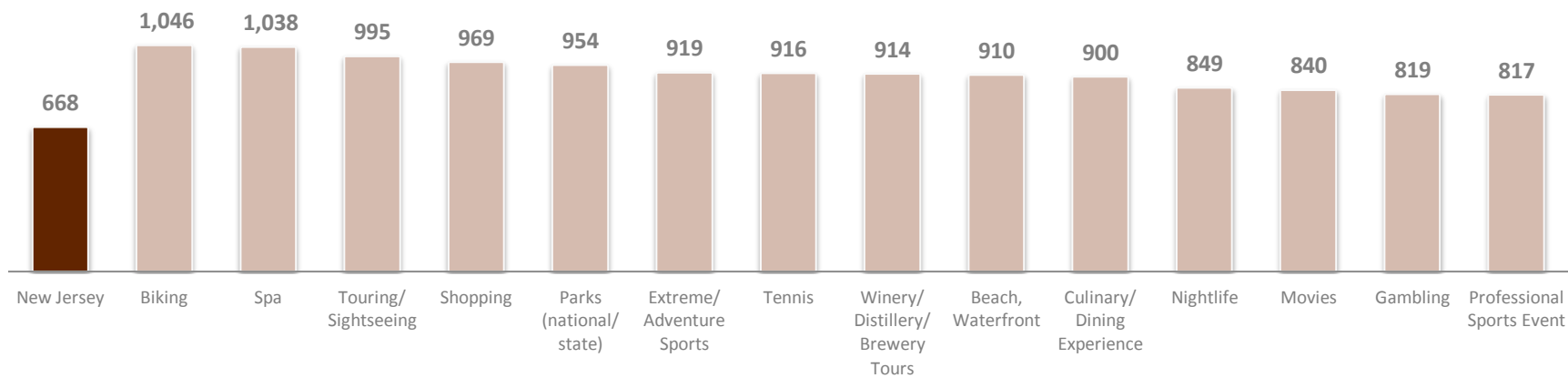


Chart 56 • Segment: 2011-2013 Overnight Leisure Stays (\$) • New Jersey N = 3,941 household count

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

ACTIVITY PARTICIPATION

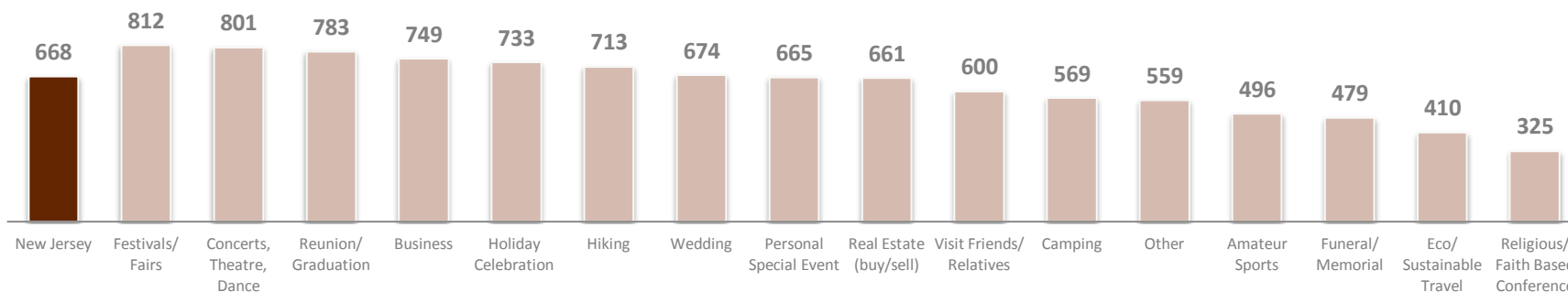


Chart 57 • Segment: 2011-2013 Overnight Leisure Stays (\$) • New Jersey N = 3,941 household count

New Jersey Activity Comparison

ACTIVITY PARTICIPATION

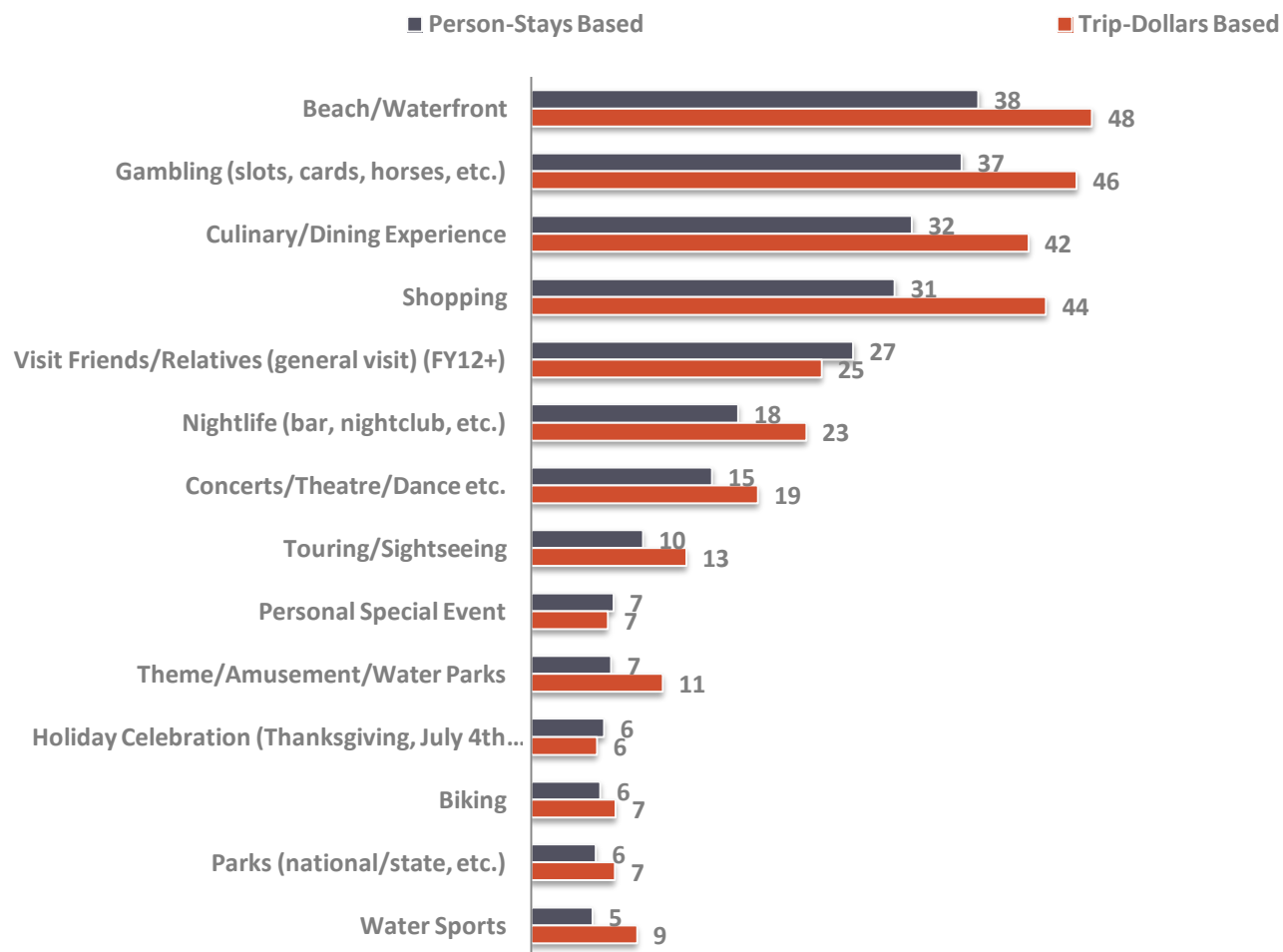


Chart 58 • Segment: 2011-2013 Overnight Leisure (%) • New Jersey N = 4,176 household count

New Jersey Activity Comparison (cont.)

ACTIVITY PARTICIPATION

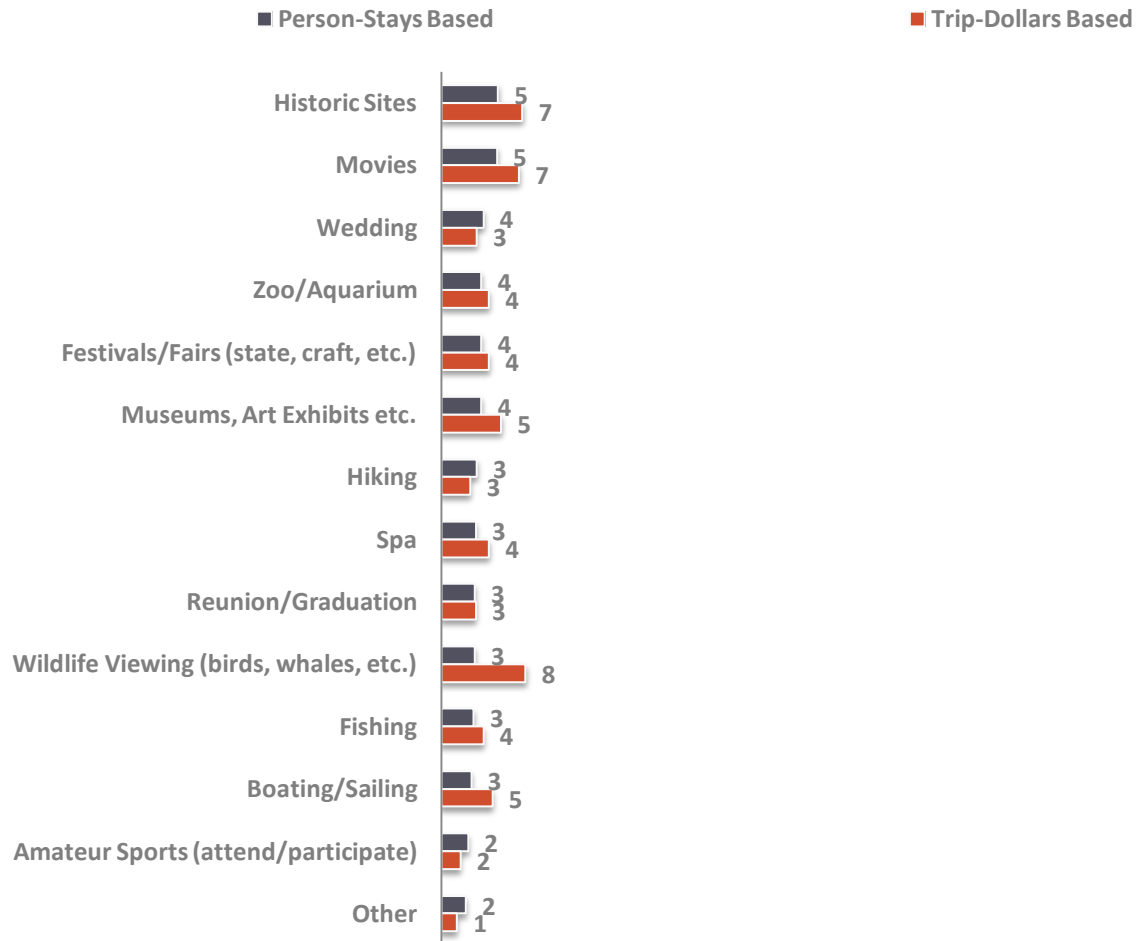


Chart 59 • Segment: 2011-2013 Overnight Leisure (%) • New Jersey N = 4,176 household count

New Jersey Activity Comparison (cont.)

ACTIVITY PARTICIPATION



Chart 60 • Segment: 2011-2013 Overnight Leisure (%) • New Jersey N = 4,176 household count

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

ACCOMMODATION

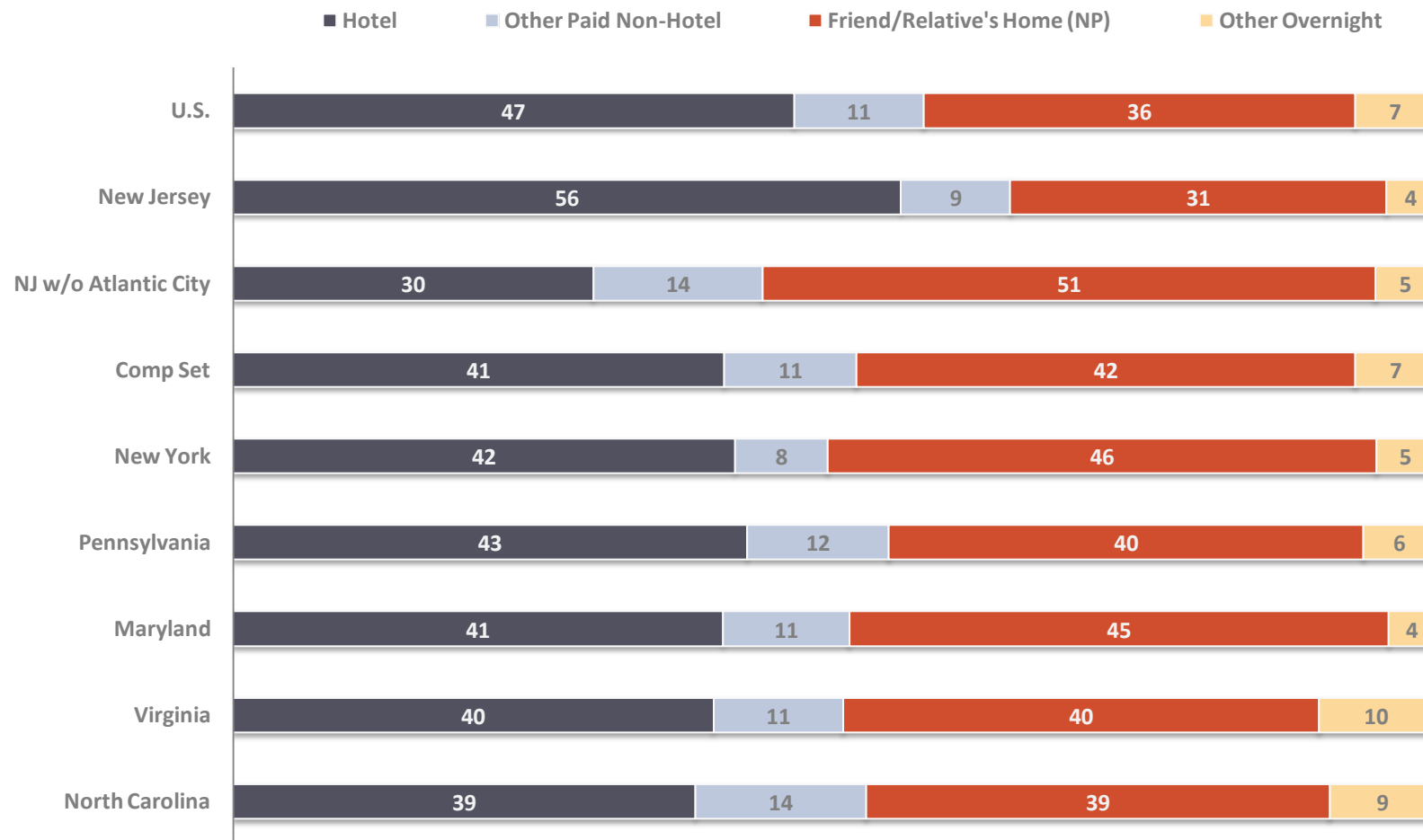


Chart 61 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,110 household count

New Jersey Avg. Party per Trip Spending by Accommodation Type

ACCOMMODATION

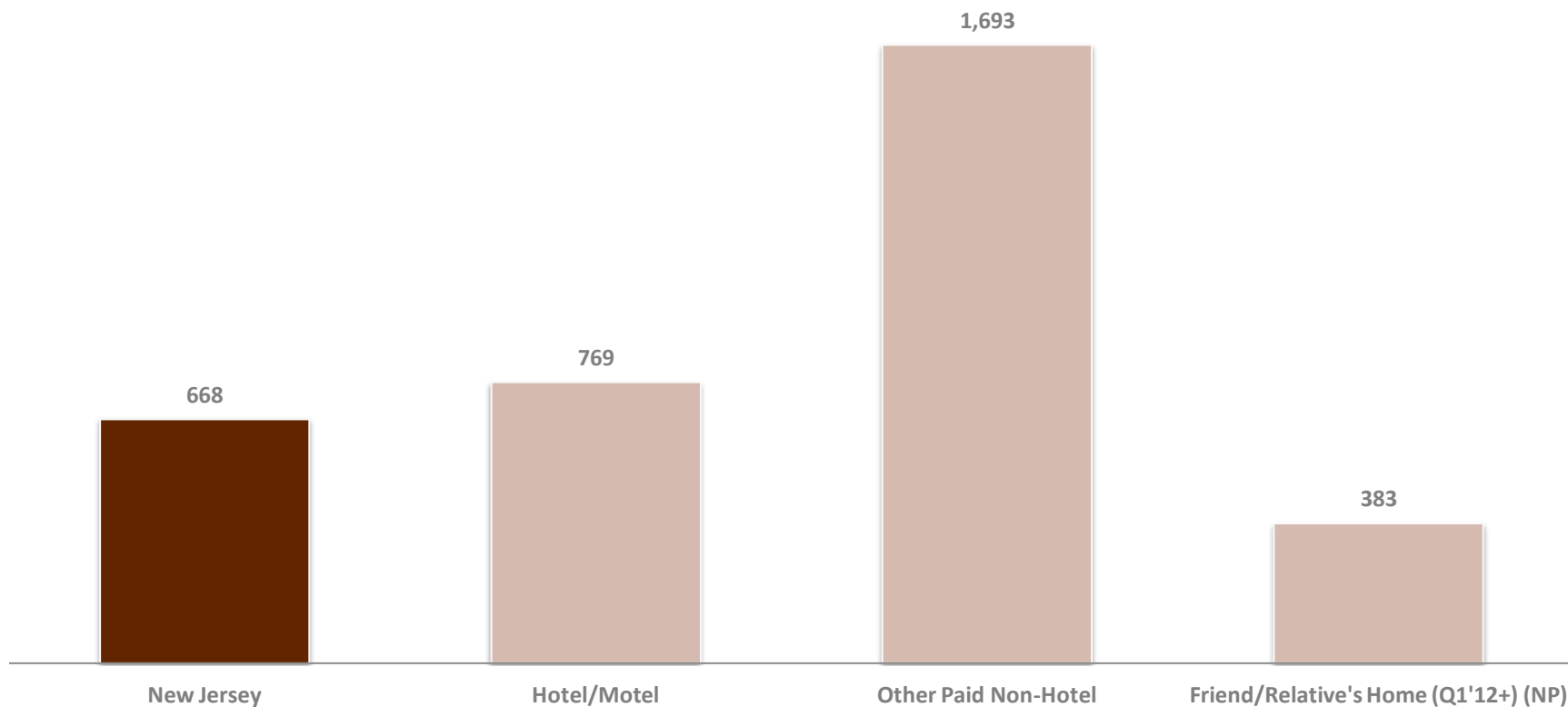


Chart 62 • Segment: 2011-2013 Overnight Leisure Stays (\$) • New Jersey N = 3,941 household count

New Jersey Accommodation Type Comparison

ACCOMMODATION

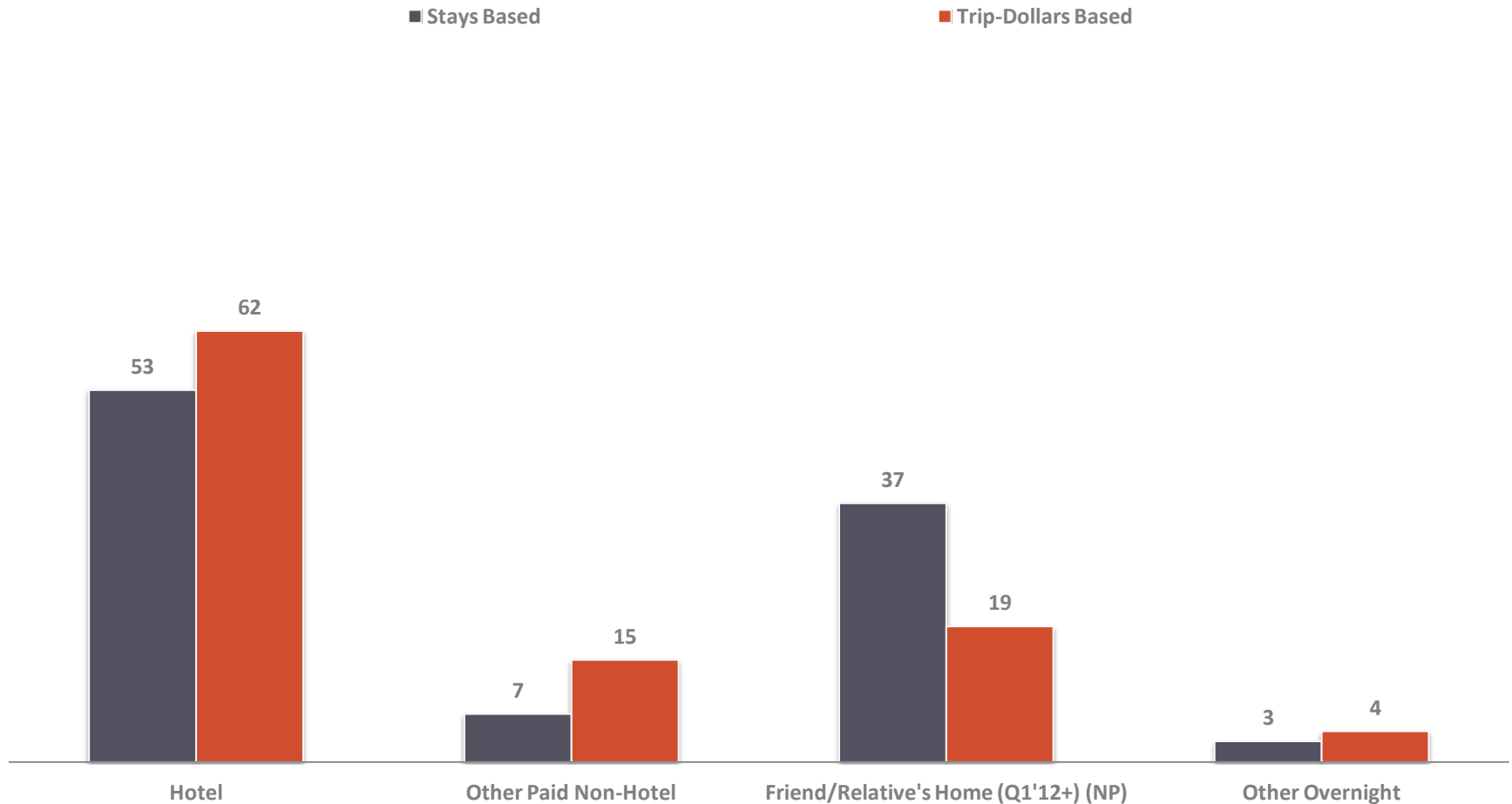


Chart 63 • Segment: 2011-2013 Overnight Leisure (\$) • New Jersey N = 4,176 household count

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 2013	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.	34,242	0.1%	0.2%	0.2%	0.3%	0.4%
New Jersey	1,110	0.5%	0.9%	1.3%	1.9%	2.5%
NJ w/o Atlantic City	755	0.6%	1.1%	1.6%	2.3%	3.0%
Comp Set	6,876	0.2%	0.4%	0.5%	0.8%	1.0%
New York	2,388	0.3%	0.6%	0.9%	1.3%	1.7%
Pennsylvania	1,745	0.4%	0.7%	1.0%	1.5%	2.0%
Maryland	828	0.6%	1.0%	1.5%	2.2%	2.8%
Virginia	1,174	0.5%	0.9%	1.3%	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 86% and the sample size is 34,242, using the chart, we can say that at the 90% level of confidence the proportion ranges between 85.8% and 86.2%.

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	86%	87%		(+/-) 1.96	95%
Sample Size (n)	34,242	45,302	-4.10	(+/-) 1.64	90%

Example:

If the Auto travel (NET) finding for U.S. is 87% in previous time period and 86% in current time period, using the chart, we can say that the actual proportion change is statistically significant since the resulting Z score (-4.10) 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 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.