



D.K. Shifflet & Associates Ltd.

Excellence in Travel Intelligence®

2014 NEW JERSEY OVERNIGHT LEISURE VISITOR PROFILE

Editorial

Summary

Charts & Graphs

Fiscal Year 2014 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 2014. 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 2014 New Jersey hosted a total...
91.7 Million visitors spending...
\$19.4 Billion dollars*

offerings and recent challenges 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 2014 New Jersey Overnight Leisure Visitor Profile is based on a sample of 1,150 traveling households. Data are based on a fiscal year comprised of fourth quarter 2013 through third quarter 2014. DKSA finalizes, and makes all quarterly data adjustments, after data collection for the fourth quarter of the year. Therefore fiscal year 2014 data is considered 'preliminary' meaning that it is subject to year end 2014 adjustments. These adjustments are reflected in the subsequent year's Visitor Profile report.

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Executive Summary

Like previous reports, this report 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.

Despite the market challenges and natural disasters faced by the State, New Jersey has experienced steady growth in visitation and spending since 2010, achieving record highs for both visitors and their associated spending each year since 2011. In 2013, year over year growth in visitation began to slow and has recovered only slightly in 2014. Growth in spending, however has continued the slow down that began in 2011.

While growth in overall travel as well as leisure travel increased in

2014, growth in overnight as well as overnight leisure travel was similar to 2013 levels. This is largely due to a much larger increase in day leisure trips during 2014.

While growth in visitation to the average U.S. destination was greater than for New Jersey in 2014, New Jersey's growth in total and overnight leisure visitor spending was greater than for the average U.S. destination. Thus, those who visited New Jersey not only spent more in 2014 than they did in 2013, but their increases in spending were greater than their counterpart's while visiting the average U.S. destination.

Primarily due to increased visitation to parts of the State other than Atlantic City, New Jersey's increased visitation led to increased market share for the State.

New Jersey Fiscal Year 2014 Highlights:

- Record high visitation and spending in 2014
- Slow, but continued growth in Overnight Leisure Visitor Volume and Spending
- Non-Atlantic City portions of the state account for largest share of Total and Overnight Leisure visitor and spending growth
- Largest increase in market share among competition since 2011 strengthening #3 position
- Pennsylvania continues decline in market share dropping to #4
- Gateway region shows largest growth in visitation
- Visitor demographics changing as visitation to non-Atlantic City regions grows
- Gaming drops in activity rankings

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 2014 in New Jersey.

Timeframe: Fiscal Year 2014 (Q4 2013 – Q3 2014)

Executive Summary

The characteristics of overnight leisure visitors to New Jersey vary 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, have tended 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. For many of these characteristics the trends are changing or the gaps are narrowing. The biggest difference in 2014 is the average age of New Jersey visitors, which has now dropped to the same age as visitors to the average destination or to the Competitive Set of states. New Jersey visitors are also just about as likely to have children in their households.

The reasons for these shifts are likely due to changes in visitor destination choices. Although the Atlantic City region still accounts for the largest share of visitation in the state, growth has been more robust in other regions such as Gateway, Delaware River and Skylands. Visitors to these regions tend to take longer trips and travel to visit friends and relatives. Conversely, visitors to the Greater Atlantic City region, tend to take shorter trips and stay in paid accommodations. Growth in this region in 2014 can be attributed to areas outside Atlantic City itself.

The impact of changes in travel 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 change that occurred in 2014 is that New Jersey once again became the primary source of visitors to the State. This means that travelers are likely to be more familiar with, and thus more likely to visit parts of the State non-residents may not.

Also in 2014, activity participation, in general has gone down. Fewer people are engaging in activities when they travel to New Jersey. Some of this may be due to the problems and new competition the casinos are facing or perhaps people are going other places to engage in the activities they enjoy. In 2011 and 2012 the top three activities were Beach/Waterfront, Culinary/Dining Experience and Gambling. In 2013 these shifted and Gambling took the top spot followed by Beach/Waterfront and Shopping; Culinary/Dining Experience dropped to number four. Now in 2014 Gambling has dropped back to number three for the state as a whole and to 18th for the non-Atlantic City destinations. 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 virtually unchanged over 2013. For both dimensions, the State is rated similarly regardless of whether or not Atlantic City is included in the analysis. Many variables can impact perceived satisfaction and value including changes in pricing or changes in the perceived quality or availability of the product. Clearly, visitors seem to be quite satisfied with their New Jersey experience.

In summary, despite significant challenges in recent years, New Jersey continues to see growth in visitation and spending. Shifts in the destinations visited within the State, have resulted in shifts in key traveler characteristics. Continued monitoring of these shifts will help inform future marketing efforts.

Visitor Volume and Spending

New Jersey hosted almost 92 million visitors, spending approximately 19.4 billion dollars in 2014 — another all time high for both visitors and spending in the State. These figures may have been even higher if it were not for continued impacts of Hurricane Sandy and the financial troubles of the Atlantic City casinos.

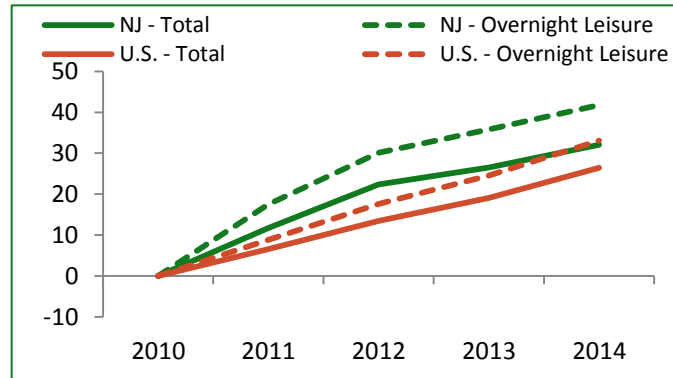
Although the State continued to experience growth in total visitor volume and associated spending, it was at a slower rate than the average U.S. destination or the combined competitive geography of New York, Pennsylvania, Maryland, Virginia and North Carolina. Despite this slow growth year, New Jersey has experienced more growth in both total and overnight leisure visitors since 2010 than has the average destination during the same time period.

For most of 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. In 2014 this trend seems to be changing direction as the number of less valuable day trips taken to the average U.S. destination grew at a higher rate than did day trips to New Jersey.

Accordingly, spending in New Jersey during 2014 grew at a much faster rate than it did in the average U.S. destination, particularly among overnight leisure travelers.

Visitor Volume

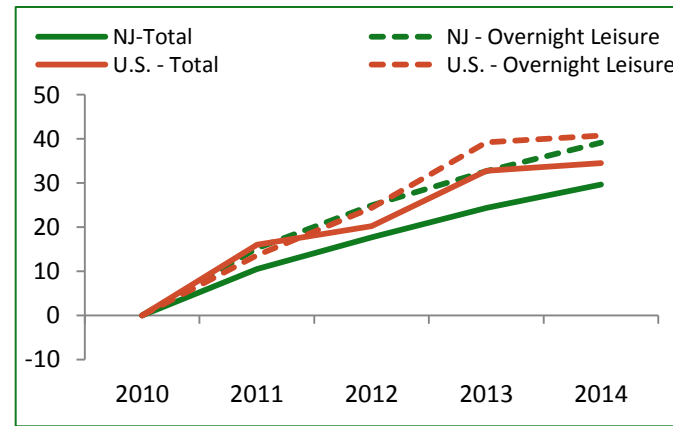
PERSON-STAYS (millions) INDEXED TO 2010



91.73 Million Visitors — ↑4.4%
39.1 Overnight — ↑4.4%

Visitor Spending

DIRECT SPENDING (billions) INDEXED TO 2010



\$19.4 Billion Dollars — ↑4.2%
\$13.4 Overnight — ↑4.8%

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 2014 quarterly adjustments

Note: Data in these graphs indexed to 2010 — 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

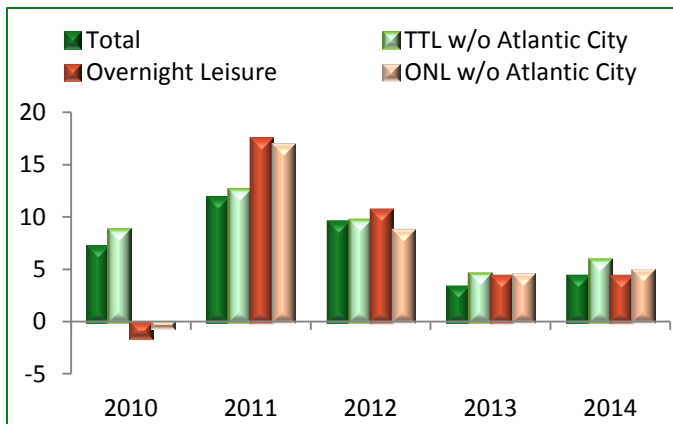
Visitation to, and spending in Atlantic City has always had a substantial impact on overall statistics for the State, but this may be changing.

In past years, the non-Atlantic City portion of the State has driven growth in total visitation, while Atlantic City has driven growth in overnight leisure. In 2014, however, the non-Atlantic City portion of the State drove growth in both total and overnight leisure visitation.

For spending, this trend started in 2013 and has continued into 2014. For a second year in a row, the non-Atlantic City portion of the state continues to drive growth in both total and overnight

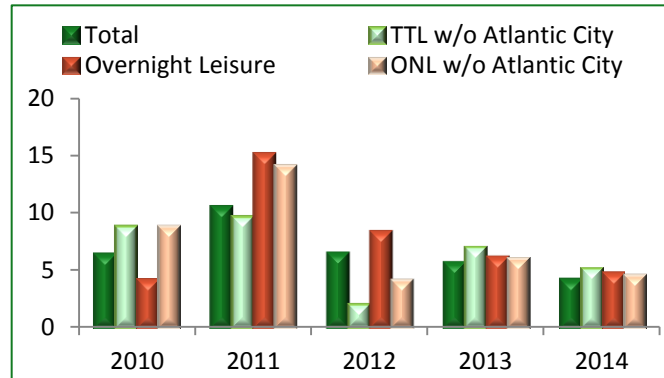
Visitor Volume

PERSON-STAYS (% change)



Visitor Spending

SPENDING (% change)



leisure spending.

Growth in spending pretty much mirrors the growth in visitors, indicating that those who are coming continue to spend at similar rates as in the past. This is good news, because growth is strongest among those visiting the non-Atlantic City portions of the State. They are still spending less per-person-per day 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.

These trends are likely to continue as Atlantic City continues to struggle with increased competition for its casino business.

Non-Atlantic City
destinations driving growth in
overnight leisure visitors and
spending

Visitor Volume and Spending

Market Share

New Jersey's market share has increased steadily since 2010 and, in 2014, strengthened its third place ranking among the competition. 2014 marked the largest increase in market share for New Jersey since 2011.

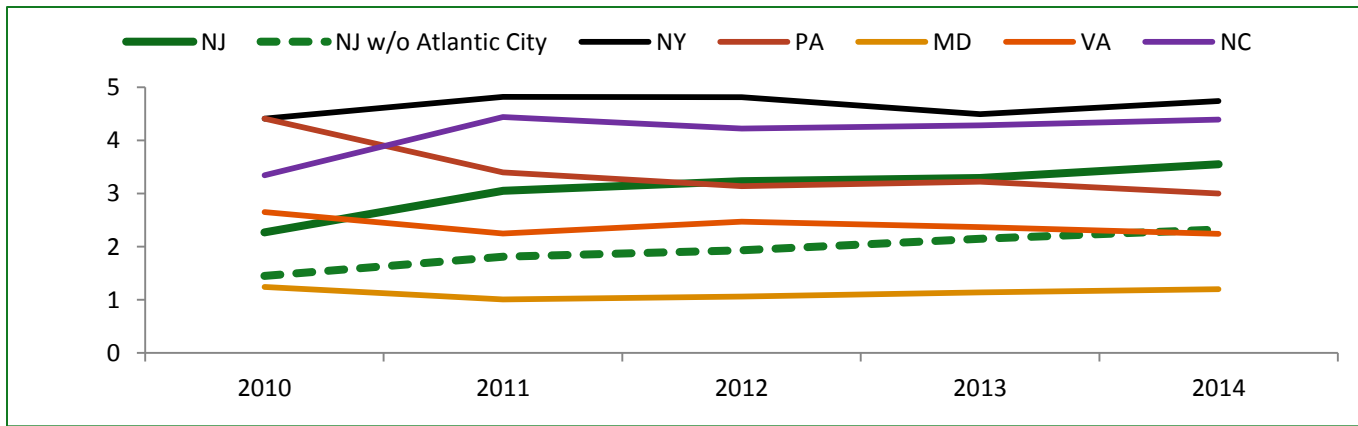
Among New Jersey's competitors both Pennsylvania and Virginia lost market share in 2014. All New Jersey competitors, excluding Pennsylvania and perhaps Virginia have been pretty much maintaining their relative positions. Virginia's continued slide has dropped the State behind New Jersey even if Atlantic City is not considered. This attests to the strength of tourism in the non-

Atlantic City portions of the State.

Pennsylvania continues to lose market share and the state that once held the top spot among this Competitive Set has dropped to the number four position. This is likely due the states decision to cut its tourism budget sometime around 2009. 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.

Competitive Market Share

OVERNIGHT LEISURE PERSON-STAYS



New Jersey strengthens its position in 2014

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 had been due to the larger number of older generations visiting the State and in particular Atlantic City. For the first time in 2014, the average age and generational composition of visitors to the State is the same as those who visit the average U.S. destination or the Competitive Set. This is due primarily to the increased visitation to the non-Atlantic City portions of the state.

Although New Jersey is still more likely than its Competitive Set to host guests without children in their households or in their travel

this percentages has dropped. Surprisingly, however the number of travel parties including children has decreased in 2014. This may be due to the larger number of Baby Boomers visiting the State, particularly Atlantic City or to the improved economy. In a slow economy people take fewer trips and those likely to be cut are non-family travel.

Incomes of New Jersey visitors have recovered and are again higher than visitors to the average destination or those visiting the Competitive Set. Even incomes of those visiting destinations other than Atlantic City for overnight trips, which have traditionally been the lowest, have increased.

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.)	47	45	47	47
Employed	64%	62%	61%	59%
Retired	18%	16%	20%	21%
Average Income (000)	\$97.5	\$99.2	\$91.3	\$93.5
Children in HH	36%	39%	37%	38%
Children in Travel Party	15%	18%	17%	16%
Generations:				
Millennial (1981+)	25%	29%	26%	24%
GenX (1965-1980)	30%	32%	29%	30%
Boomer (1946-1964)	39%	34%	36%	36%
Silent/GI (1945 back)	7%	5%	9%	10%

Non-Atlantic City Visitors...

Younger

Higher Income

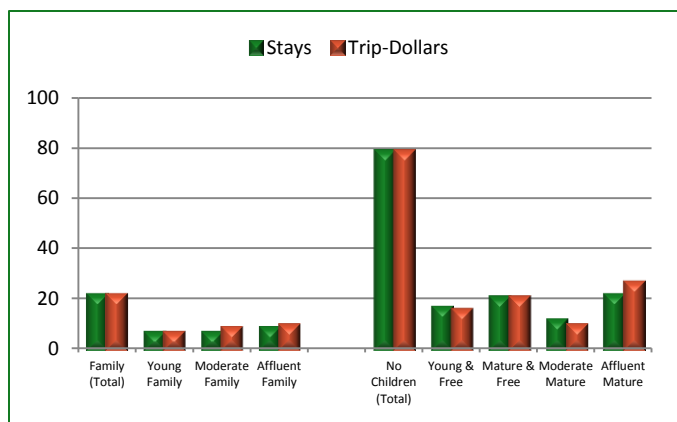
Include Kids in Travel Party

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 (2012-2014)

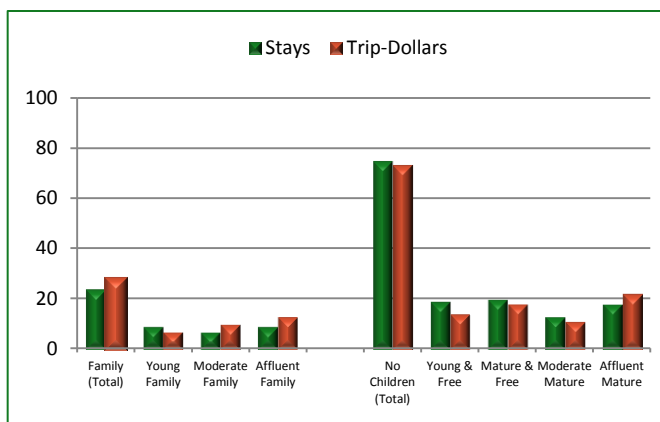


DKSA Lifestage Definitions

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 (2012-2014)



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

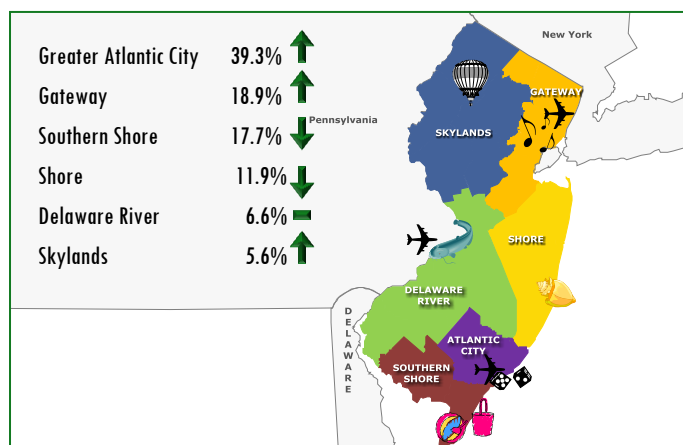
Where do New Jersey's visitors come from?

Almost 9 out of 10 New Jersey visitors come from 7 states with about 30% coming from New Jersey itself and an additional 40% coming from the neighboring states of New York and Pennsylvania.

It is not surprising then that the majority of travel to New Jersey is by auto and that the average one-way distance traveled is about 240 miles — almost 200 miles less than to the average U.S. destination and about 120 miles less than to New Jersey's Competitive Set. It is interesting to note that there is a higher incidence to travel by bus than by plane to New Jersey.

New Jersey Destination Regions

OVERNIGHT LEISURE SHARE OF PERSON-STAYS



New Jersey Origin States

OVERNIGHT LEISURE SHARE OF PERSON-STAYS

New Jersey	29.8%
New York	23.9%
Pennsylvania	16.1%
Maryland	4.8%
Florida	4.4%
Ohio	3.1%
Virginia	2.5%
Other	15.4%

Where do New Jersey's visitors go?

Experiencing a very slight increase in 2014, 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 3%.

Although the Delaware River and Skylands regions experienced growth in 2014, the Gateway region was the big winner with an increase of almost 5%. This is likely accounting for many of the changes in visitor demographics in 2014.

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

Why do travelers visit New Jersey?

Visiting Friends or Relatives followed closely by Getaway Weekends were the predominant types of trips for New Jersey's overnight leisure visitors in 2014. The reasons for visiting New Jersey, however, vary substantially depending on whether or not Atlantic City is included in the analysis.

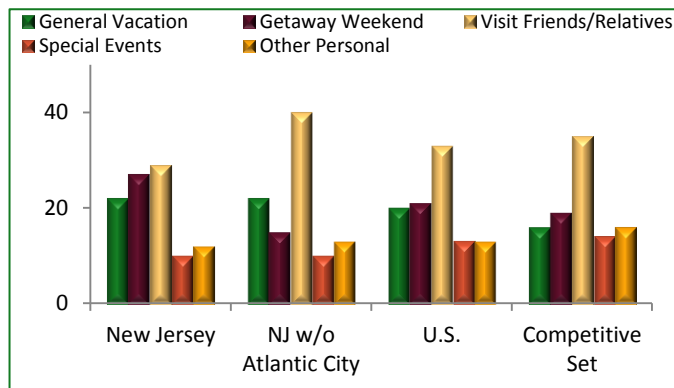
Although Getaway Weekends still account for a larger share of vacation-type travel than do General Vacations, the percentage of General Vacations has been steadily increasing since 2012. This is likely due to increased travel to non-Atlantic City destinations.

When Atlantic City is excluded, Getaway Weekends drop substantially and Visiting Friends and Relatives jumps to 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 2014 visitors spent a larger share of their travel dollar on transportation and shopping than in 2013, which may be contributing to the higher daily spend. The average daily spending in the State as a whole is over 20% higher than when Atlantic City is excluded from the analysis. Again demonstrating the value of the Atlantic City area.

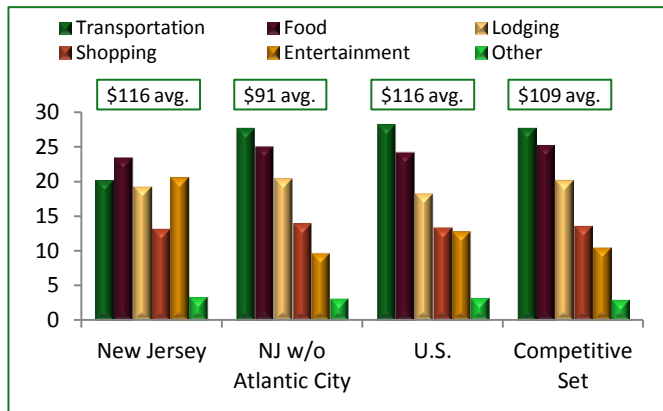
Purpose of Travel

OVERNIGHT LEISURE PERSON-STAYS



Per-Person-Per-Day Spending

OVERNIGHT LEISURE



Atlantic City area drives
Weekend Getaways
and Spending

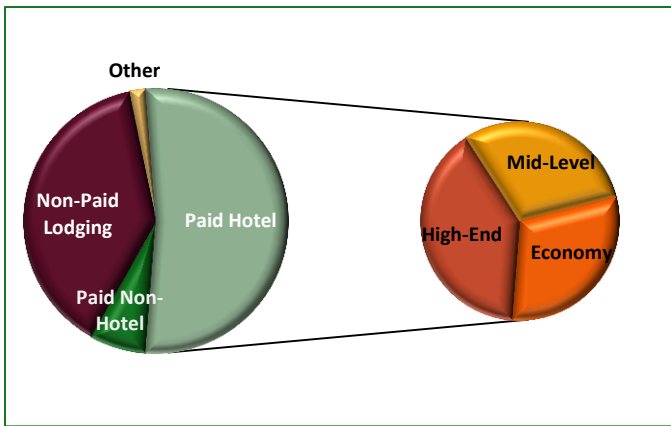
What type of accommodations do they stay in?

About than 3 out of every 5 visitors to New Jersey stay in paid accommodations, which is *greater than* in the average destination or 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 *less than* either the average destination or the Competitive Set. The percentage of paid accommodation stayers who stay in hotels drops to about 80%.

New Jersey

OVERNIGHT LEISURE PERSON-STAYS

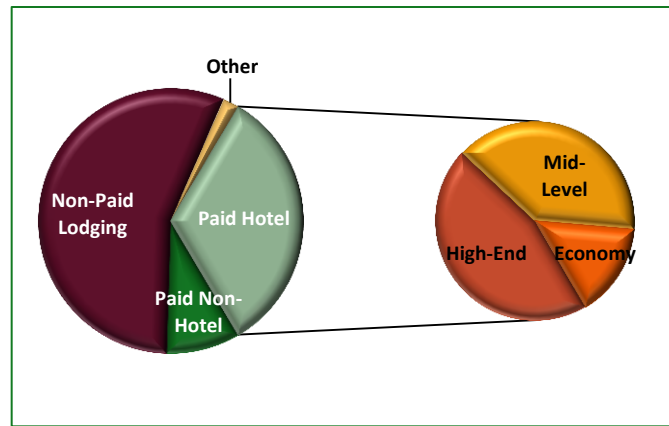


Among those visiting regions excluding Atlantic City, half are staying with Friends or Relatives. Thus it is clear that the Atlantic City region is driving the large number of hotel stays in the State.

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, 70% of hotel stayers spend their nights in high-end or mid-level hotels. When Atlantic City is excluded, this percentage jumps to 84%. Thus non-Atlantic City visitors are paying the most for lodging.

New Jersey without Atlantic City

OVERNIGHT LEISURE PERSON-STAYS



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

Party Composition/Stay Length

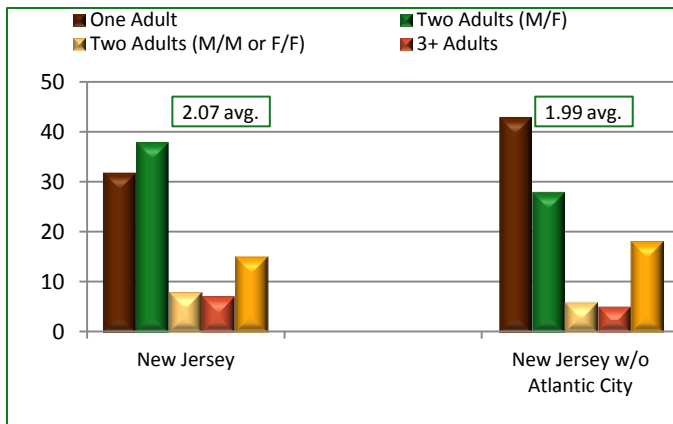
Who do they travel with; how long do they stay?

Travel parties consisting of one or two adults account for over three-quarters 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.

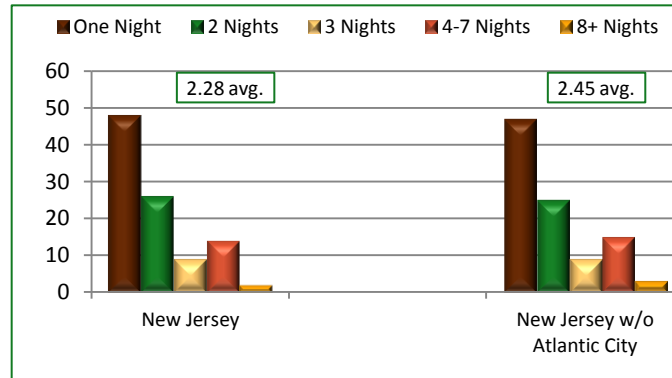
Travel Party Composition

OVERNIGHT LEISURE STAYS



Stay Length

OVERNIGHT LEISURE STAYS – (1+ NIGHTS)



At between 2.0 and 2.1 persons, the average Travel Party size for either New Jersey geography is smaller than either the average U.S. destination and about the same as the Competitive Set.

With an average of 2.3 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 slightly 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?

Activity participation, in general seemed to be depressed in 2014 as most activities showed declines in participation.

For those who do engage in activities while visiting New Jersey what they do varies widely depending on whether or not they are visiting Atlantic City. 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
3. Gambling (slots, cards, horses, etc.)
4. Shopping
5. Visiting Friends and Relatives

After ranking number one in 2013, Gambling has once again fallen back to the third most popular activity in New Jersey; pushing Beach/Waterfront up to the top position once again.

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 Nightlife followed closely by Visiting Theme/Amusement/Water Parks and the much less lucrative activities of Touring/Sightseeing and Visiting Historic Sites.

In fact, tied with seeing Movies and attending a Wedding, Gambling ranks only 18th for this portion of the State.

1. Visiting Friends and Relatives
2. Beach/Waterfront
3. Culinary/Dining Experience
4. Shopping
5. Nightlife (bar, nightclubs, etc.)

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 in 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 Gambling and visiting New Jersey's Beaches and Waterfront.

Gambling ↓
Beach/Waterfront ↓
Other activities — mixed,
but trending down

How do New Jersey visitors rate the State?

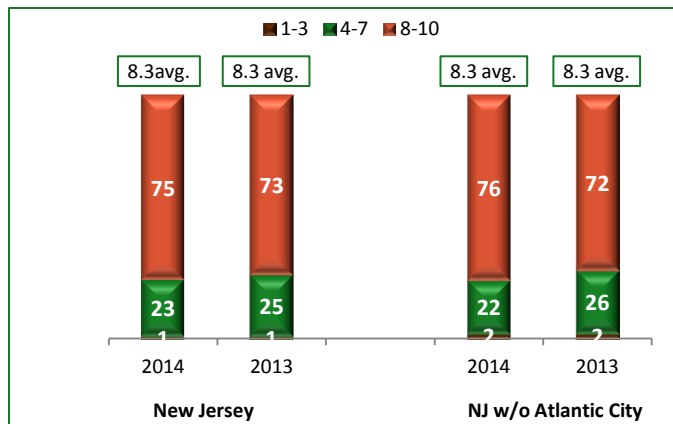
Respondents are asked to rate their overall satisfaction with the destinations they visit as well as the overall value for the money the destination provides. Ratings are on a 10-point scale, where 1 is low or 'poor' and 10 is high or 'excellent'.

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 2014 all competitive states achieved average ratings of between 8.7 and 9.2, similar to the average U.S. destination.

Excellent satisfaction ratings for New Jersey, whether or not Atlantic City is included, remained stable in 2014 indicating that improved satisfaction levels achieved in 2013 continue.

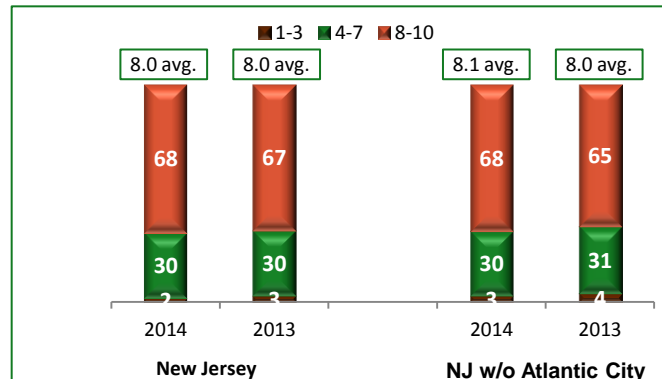
Overall Satisfaction

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 increased in 2013 and done so again in 2014. This occurred for the entire state as well as for the non-Atlantic City regions. Excluding Pennsylvania and Virginia, which experienced drops in Value ratings, the competitive states, also remained fairly consistent between 2013 and 2014.

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 to not only 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.

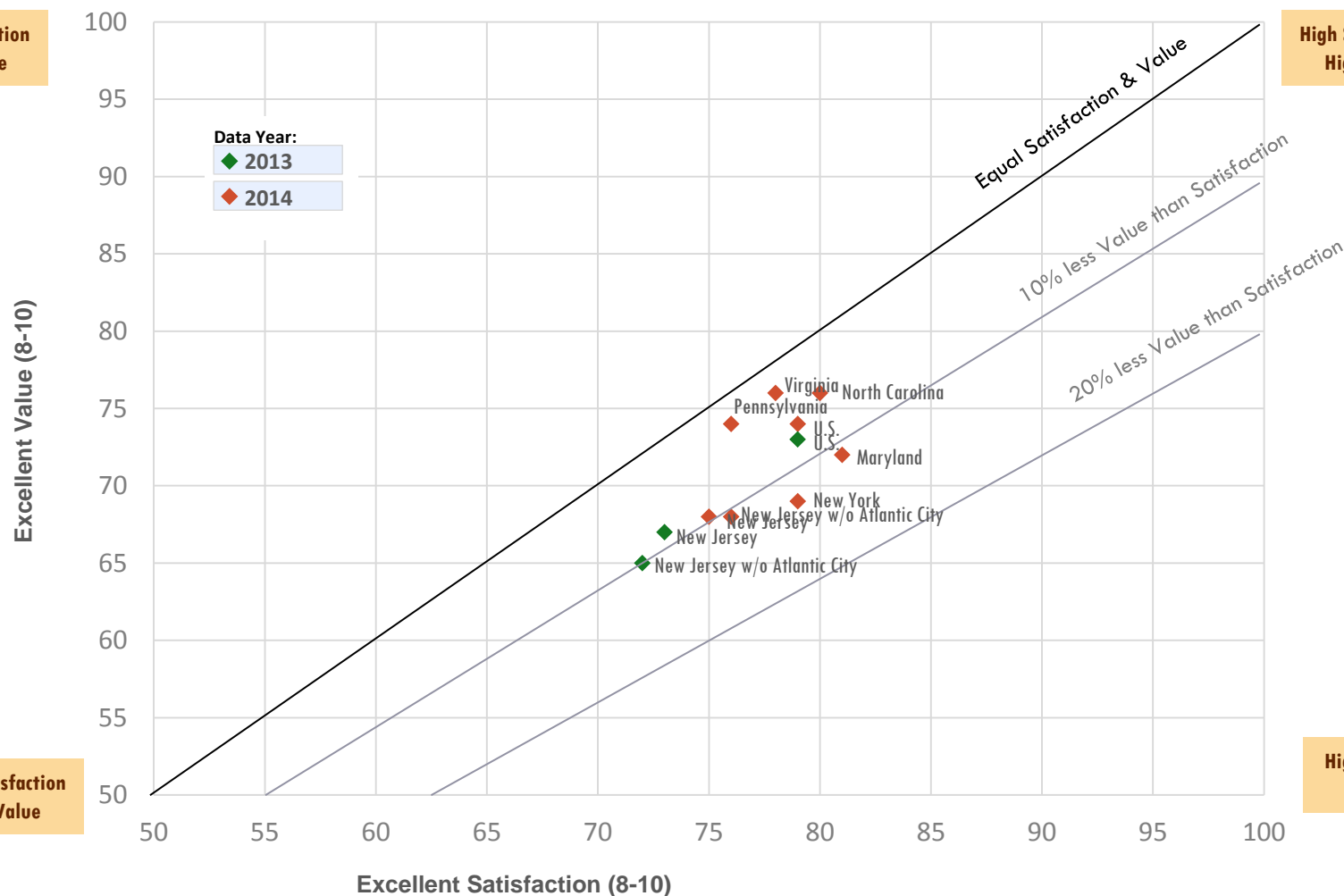
Satisfaction and Value
Strong

New Jersey Ratings

PERFORMANCE RATINGS

Low Satisfaction
High Value

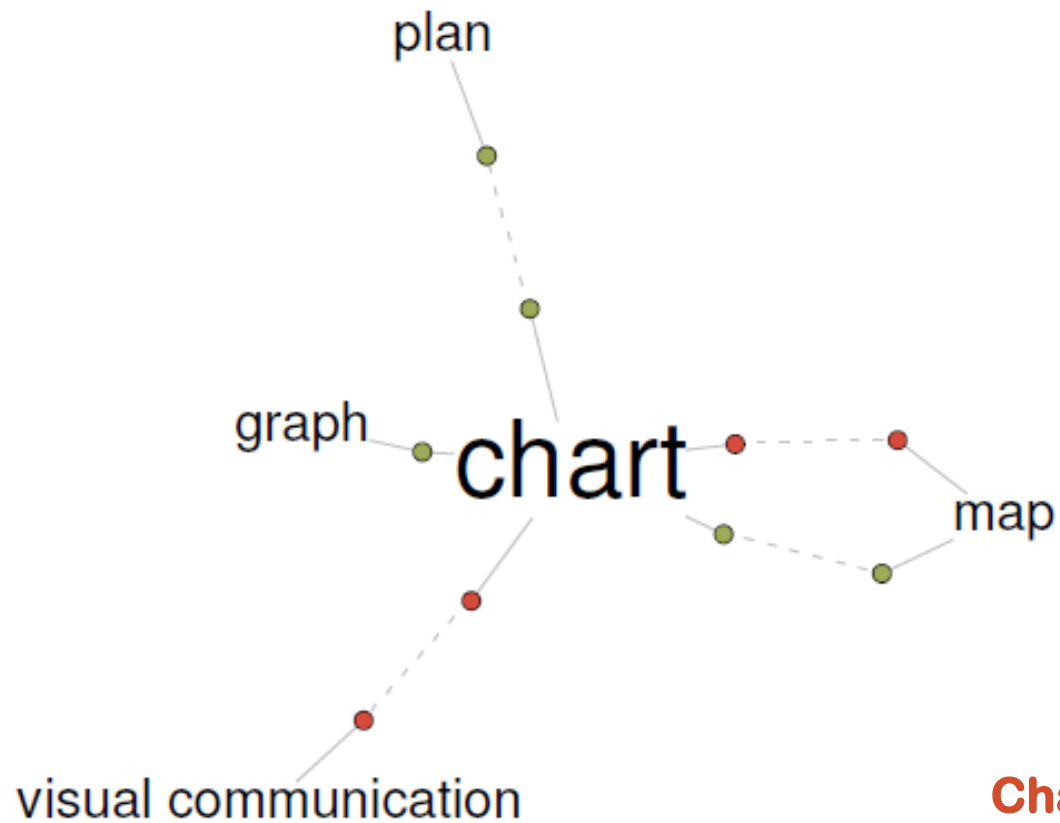
High Satisfaction
High Value



Low Satisfaction
Low Value

High Satisfaction
Low Value

Segment: 2014/2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,150 household count



Charts and Graphs

New Jersey Year-End 2014 Visitor Profile

U.S. Travel Segments

MARKET SHARE

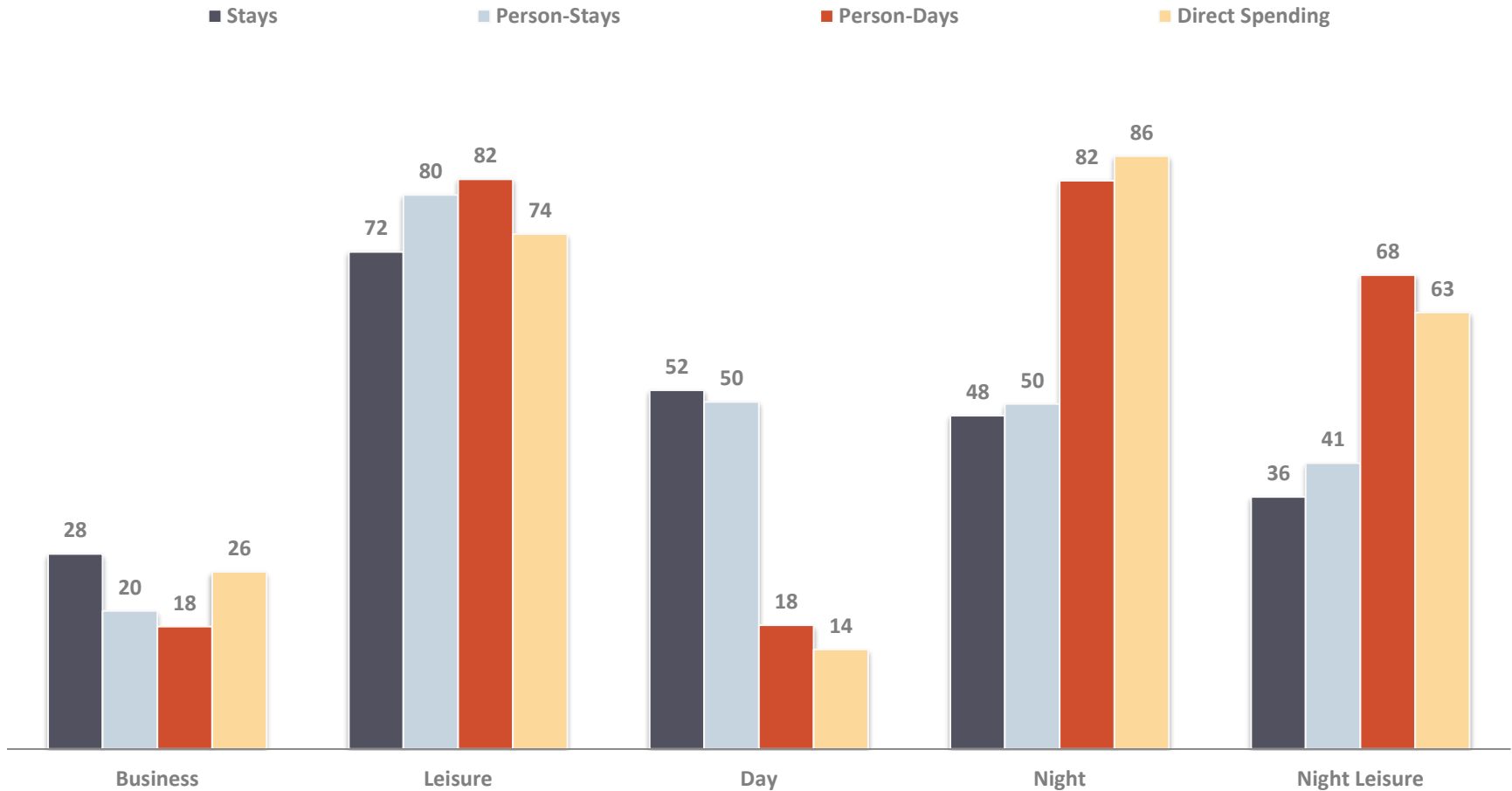


Chart 1 • Segment: 2014 Total Volume (%)

U.S. Travel Volume Change by Division

VOLUME

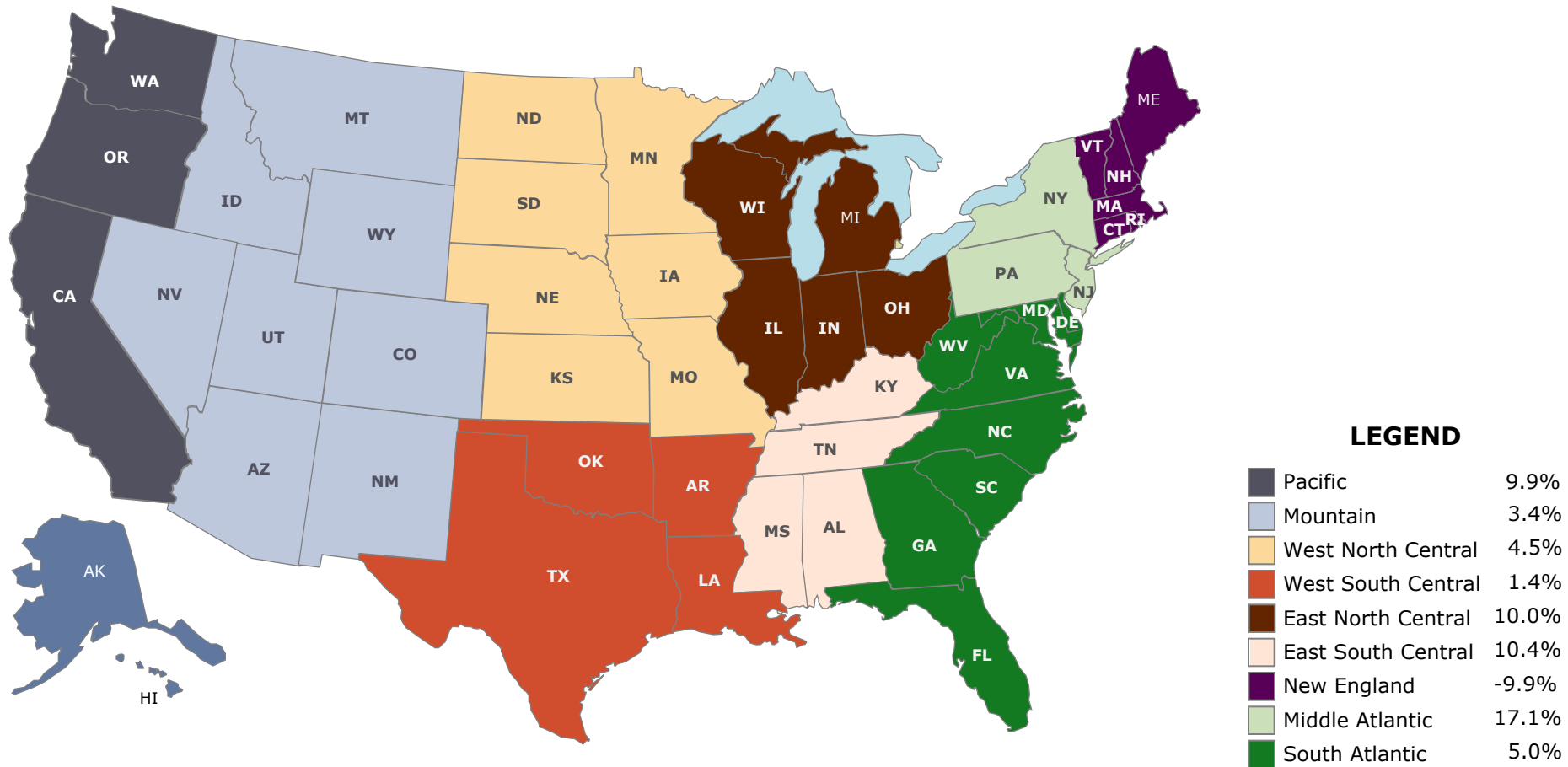


Chart 2 • Segment: 2013/2014 Overnight Leisure Person-Stays (%)

New Jersey Travel Segments

MARKET SHARE

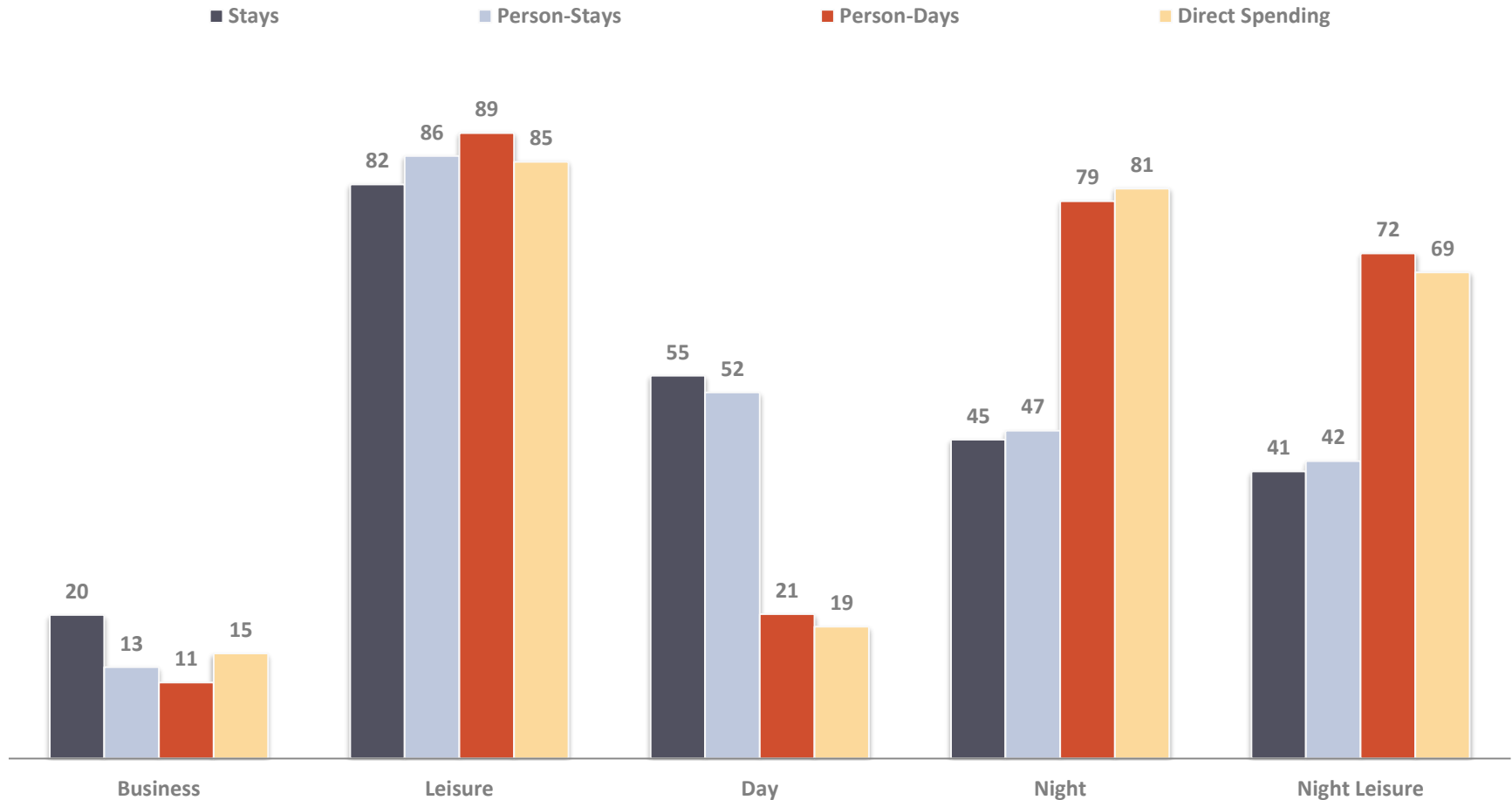


Chart 7 • Segment: 2014 Total Volume (%)

New Jersey Person-Stays Volume

VOLUME

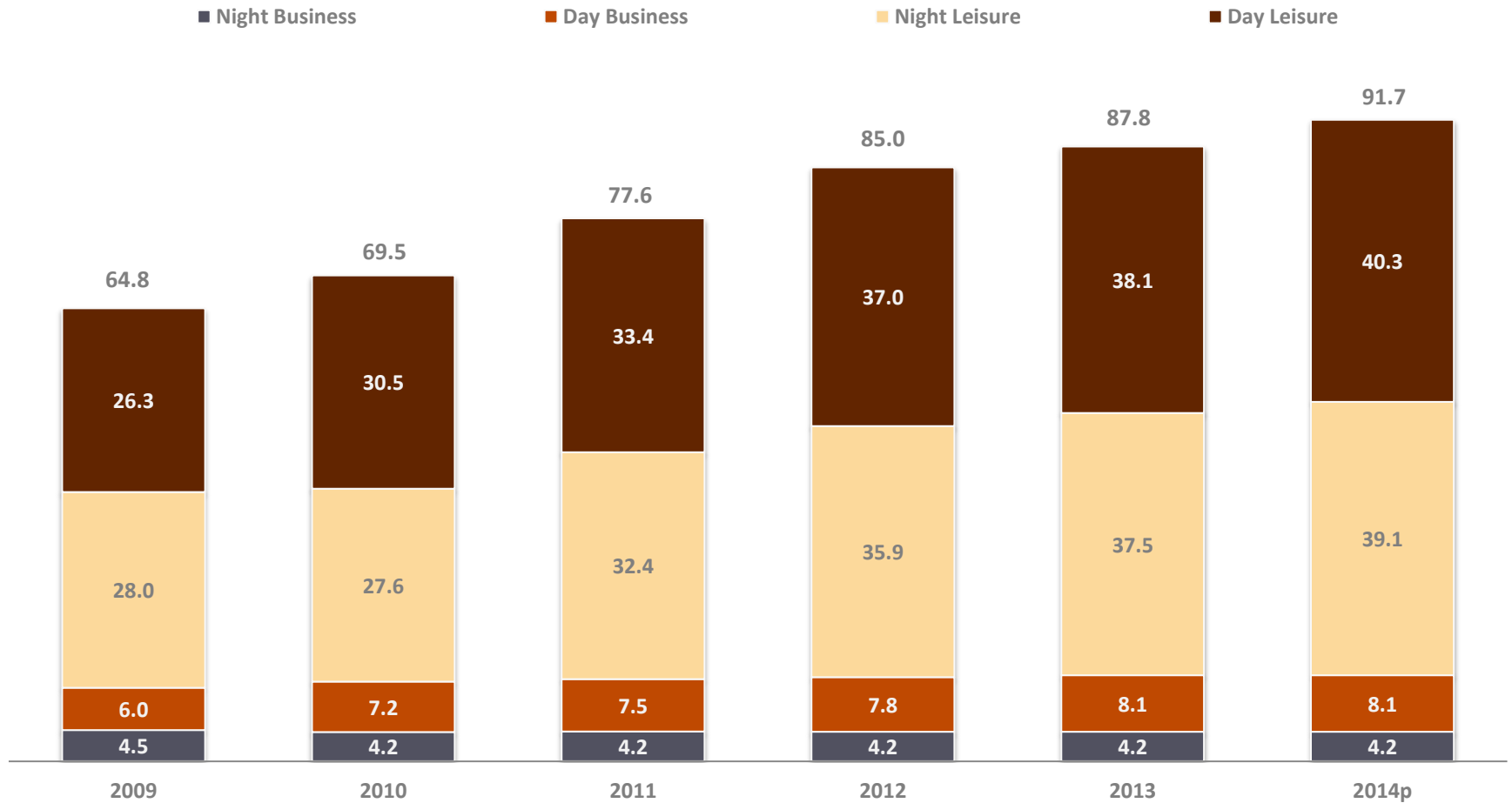


Chart 3 • in Millions

New Jersey Person-Stays Volume

VOLUME

	New Jersey					U.S.
	10/09	11/10	12/11	13/12	14/13p	14/13p
Total	7.2%	11.8%	9.5%	3.4%	4.4%	6.2%
Business	8.4%	3.4%	2.7%	1.3%	0.5%	0.5%
Leisure	7.0%	13.4%	10.7%	3.7%	5.1%	7.7%
Day	16.7%	8.7%	9.5%	3.0%	4.9%	6.5%
Night	-2.1%	15.4%	9.4%	3.8%	3.9%	5.8%
Day Business	19.1%	4.6%	4.5%	2.6%	1.0%	-0.1%
Day Leisure	16.1%	9.7%	10.7%	3.0%	5.7%	8.6%
Night Business	-6.1%	1.3%	-0.4%	-1.1%	-0.5%	1.4%
Night Leisure	-1.5%	17.5%	10.7%	4.4%	4.4%	6.8%

Chart 4 • % change

New Jersey Direct Spending Volume

DIRECT SPENDING

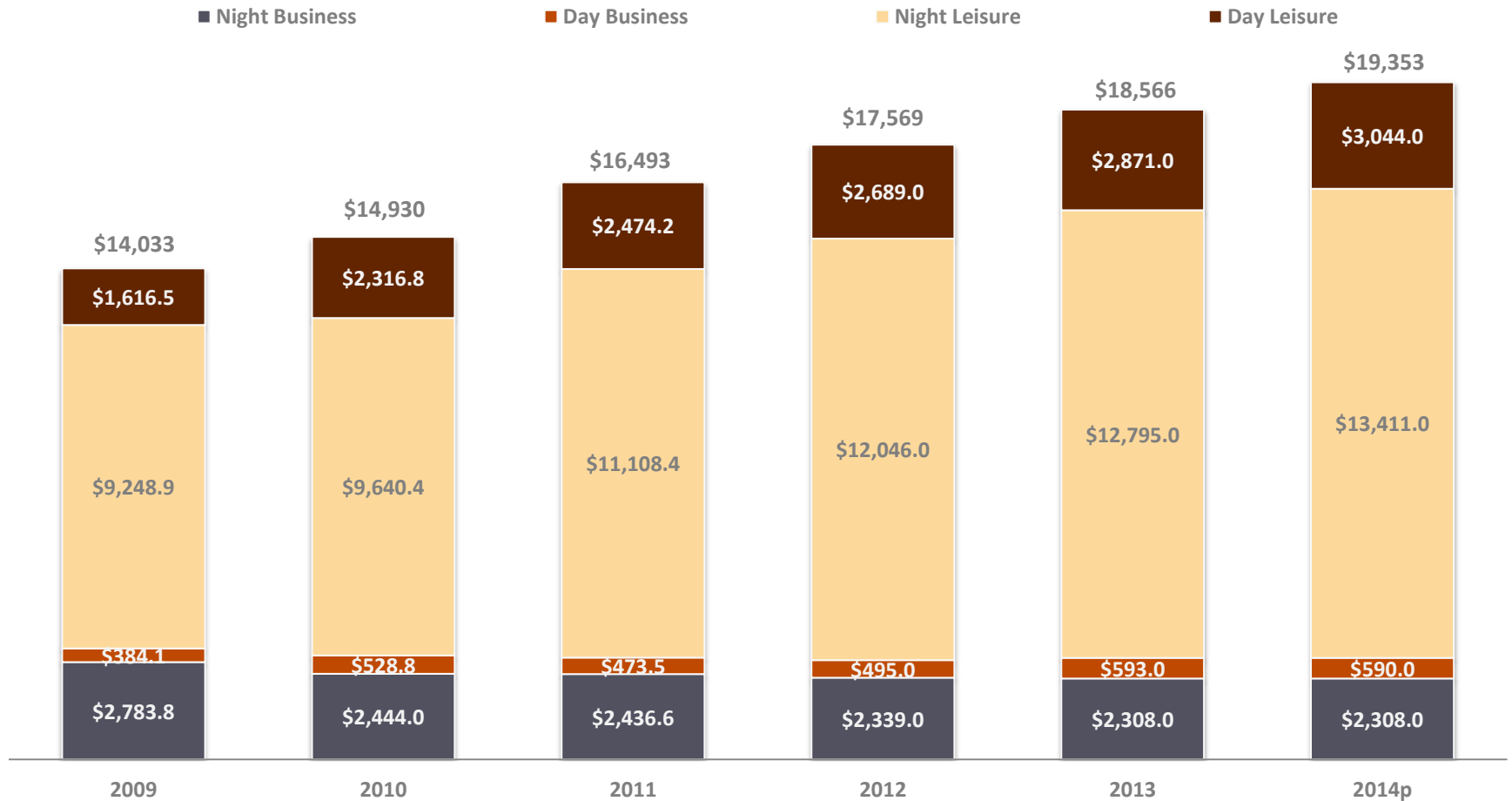


Chart 5 • \$ Millions

New Jersey Direct Spending Volume

DIRECT SPENDING

	New Jersey					U.S.
	10/09	11/10	12/11	13/12	14/13p	14/13p
Total	6.4%	10.5%	6.5%	5.7%	4.2%	1.3%
Business	-6.1%	-2.1%	-2.6%	2.3%	-0.1%	0.3%
Leisure	10.0%	13.6%	8.5%	6.3%	5.0%	1.6%
Day	42.5%	3.6%	8.0%	8.8%	4.9%	3.5%
Night	0.4%	12.1%	6.2%	5.0%	4.1%	0.9%
Day Business	37.7%	-10.5%	4.6%	19.7%	-0.5%	0.3%
Day Leisure	43.3%	6.8%	8.7%	6.8%	6.0%	4.3%
Night Business	-12.2%	-0.3%	-4.0%	-1.3%	0.0%	0.3%
Night Leisure	4.2%	15.2%	8.4%	6.2%	4.8%	1.1%

Chart 6 • % change

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

MARKET SHARE

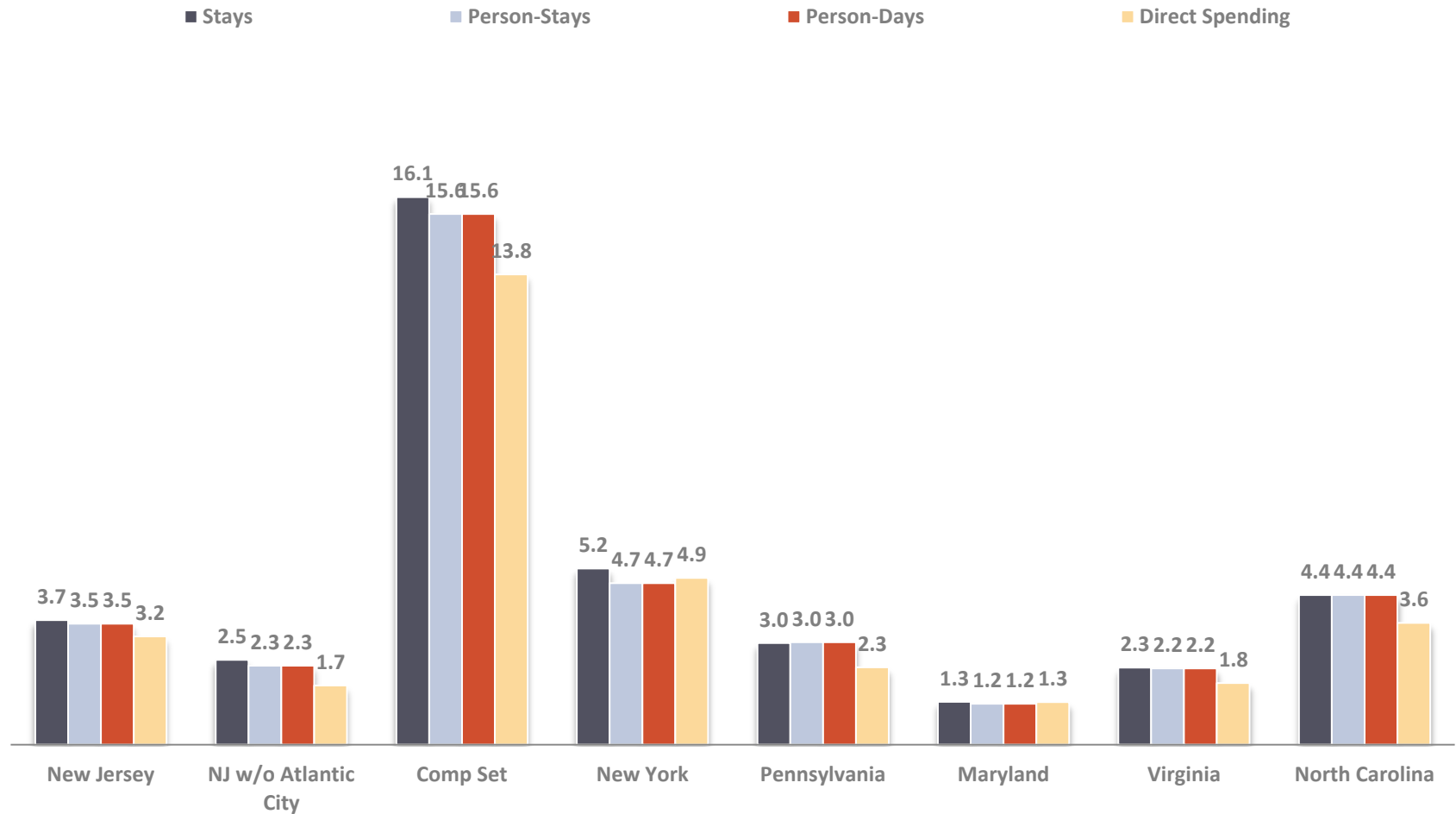


Chart 8 • Segment: 2014 Overnight Leisure (%) • New Jersey N = 1,150 household count

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

DEMOGRAPHICS

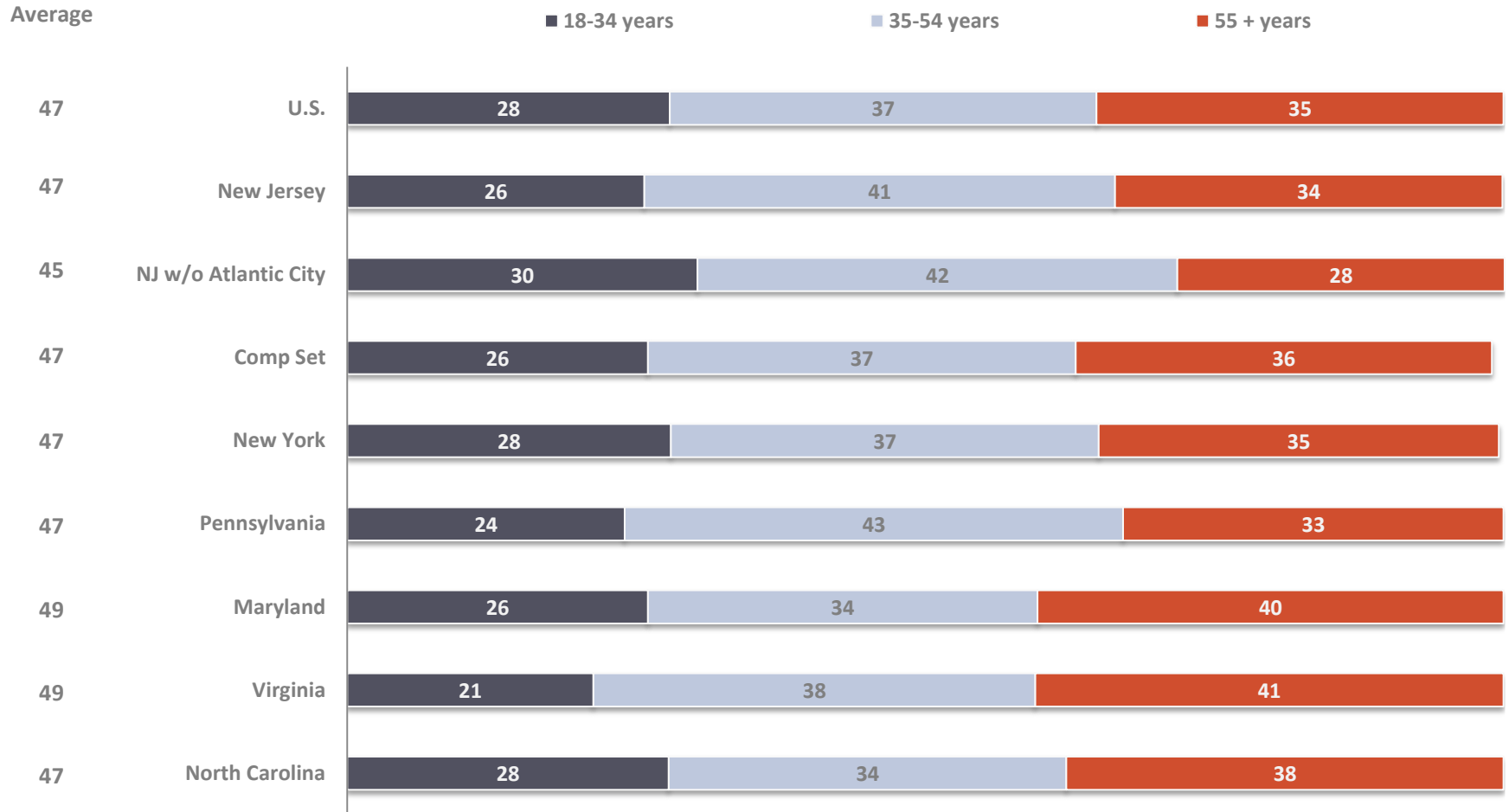


Chart 9 • Segment: 2014 Overnight Leisure Person-Stays (%) • New Jersey N = 1,150 household count

New Jersey Avg. Party per Stay Spending by Age

DEMOGRAPHICS

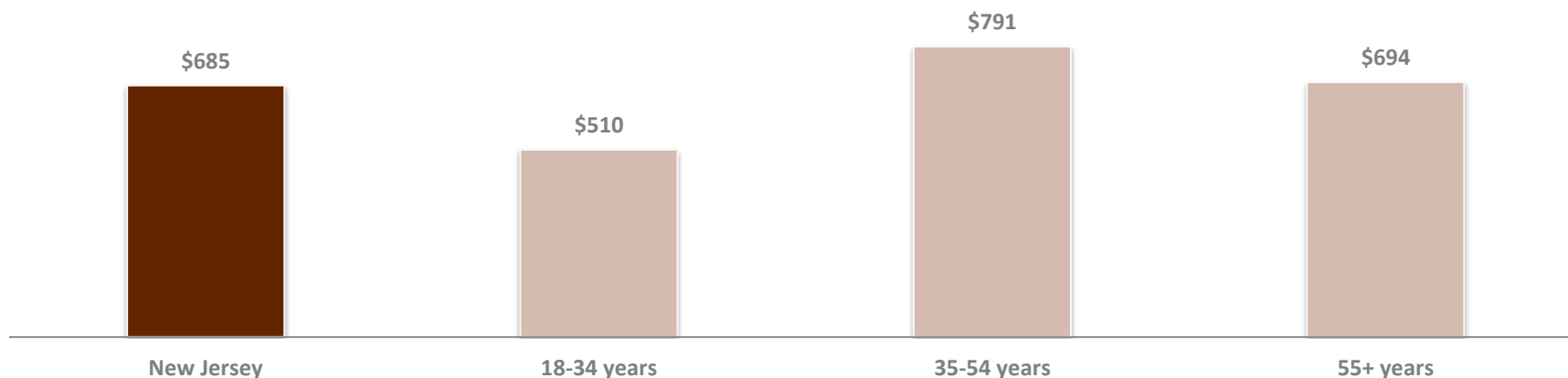


Chart 10 • Segment: 2012-2014 Overnight Leisure Stays (\$) • New Jersey N = 4,004 household count

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

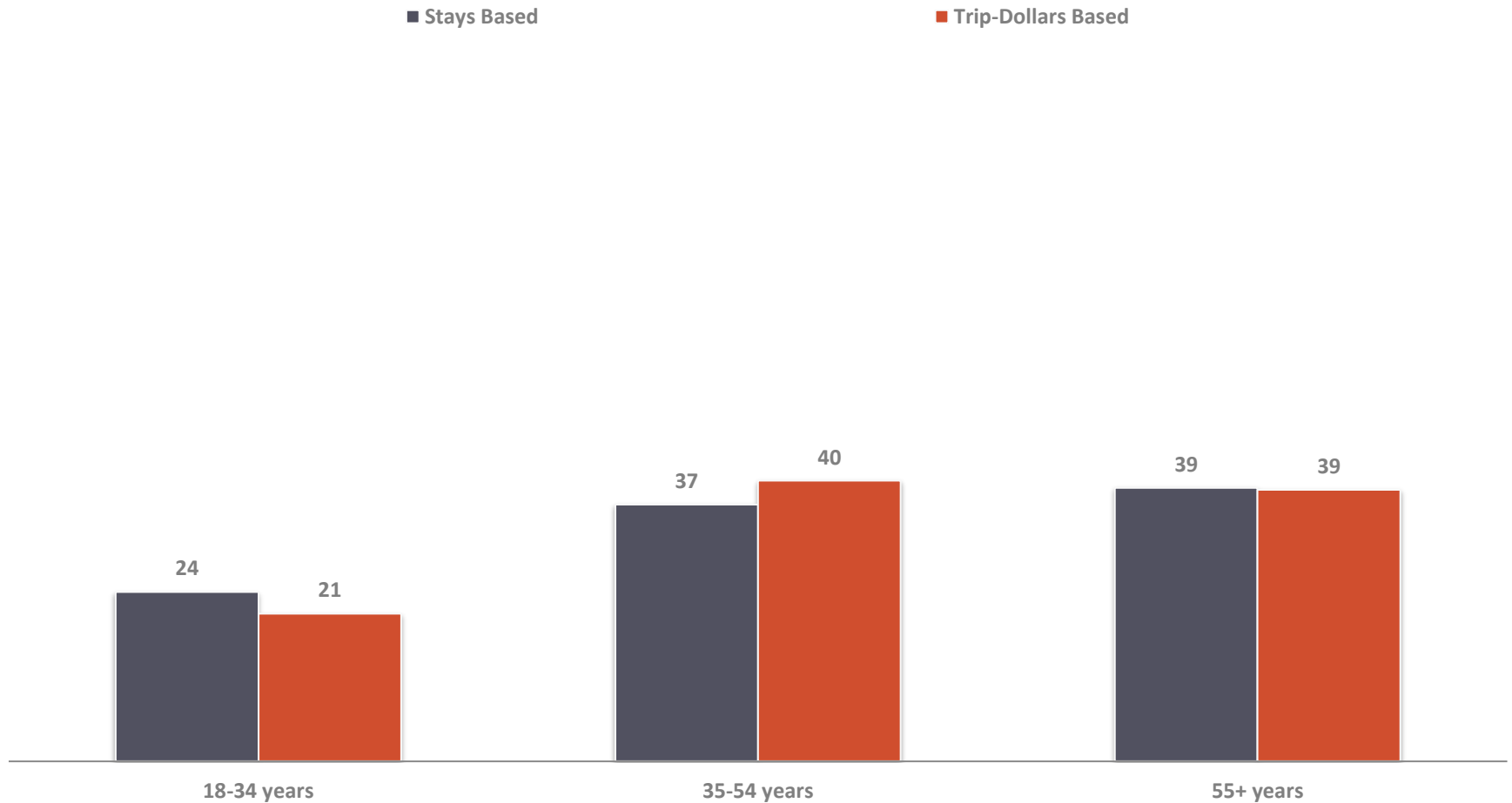


Chart 11 • Segment: 2012-2014 Overnight Leisure (%) • New Jersey N = 4,216 household count

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

DEMOGRAPHICS

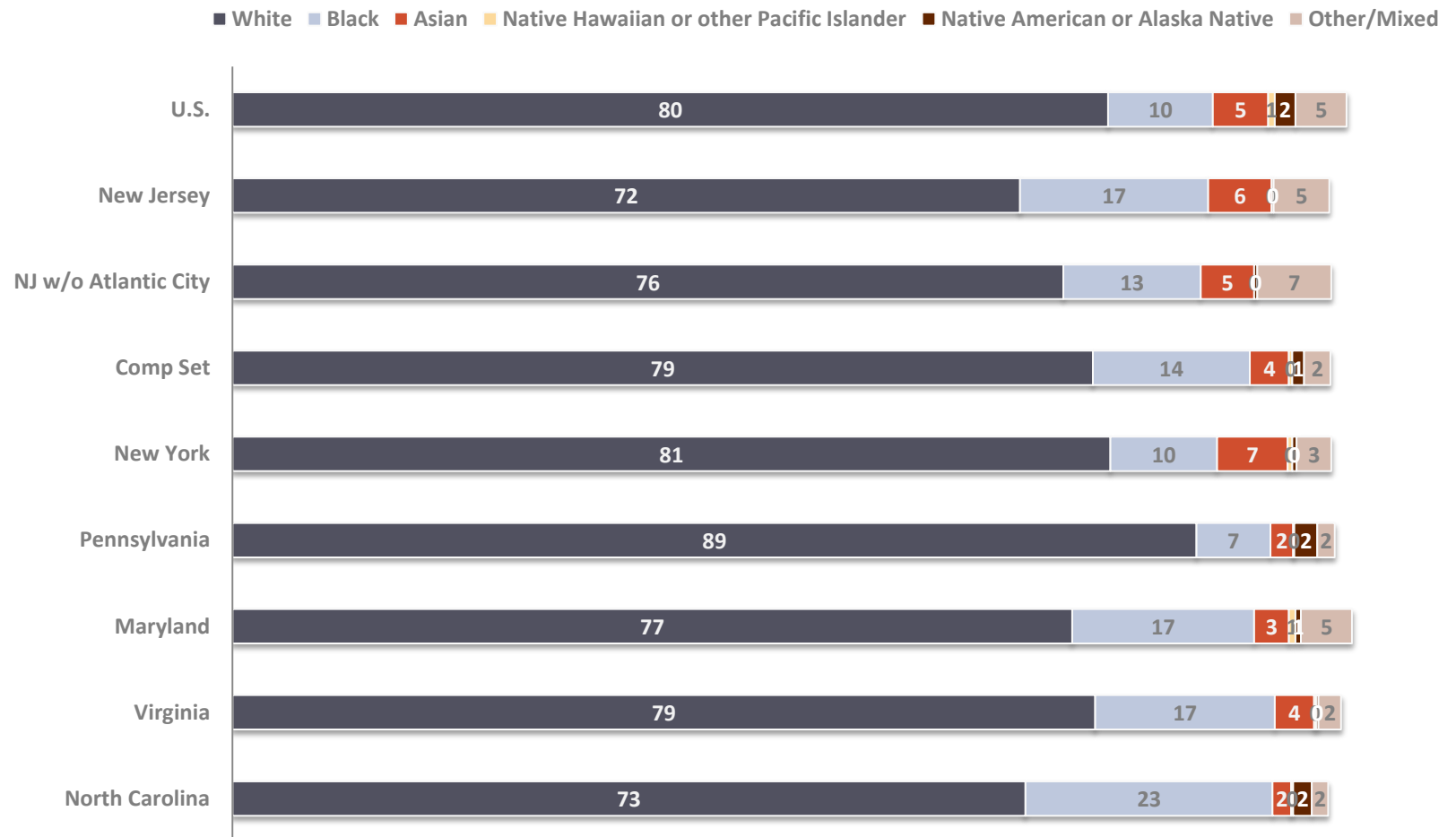


Chart 12 • Segment: 2014 Overnight Leisure Person-Stays (%) • New Jersey N = 1,139 household count

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

DEMOGRAPHICS

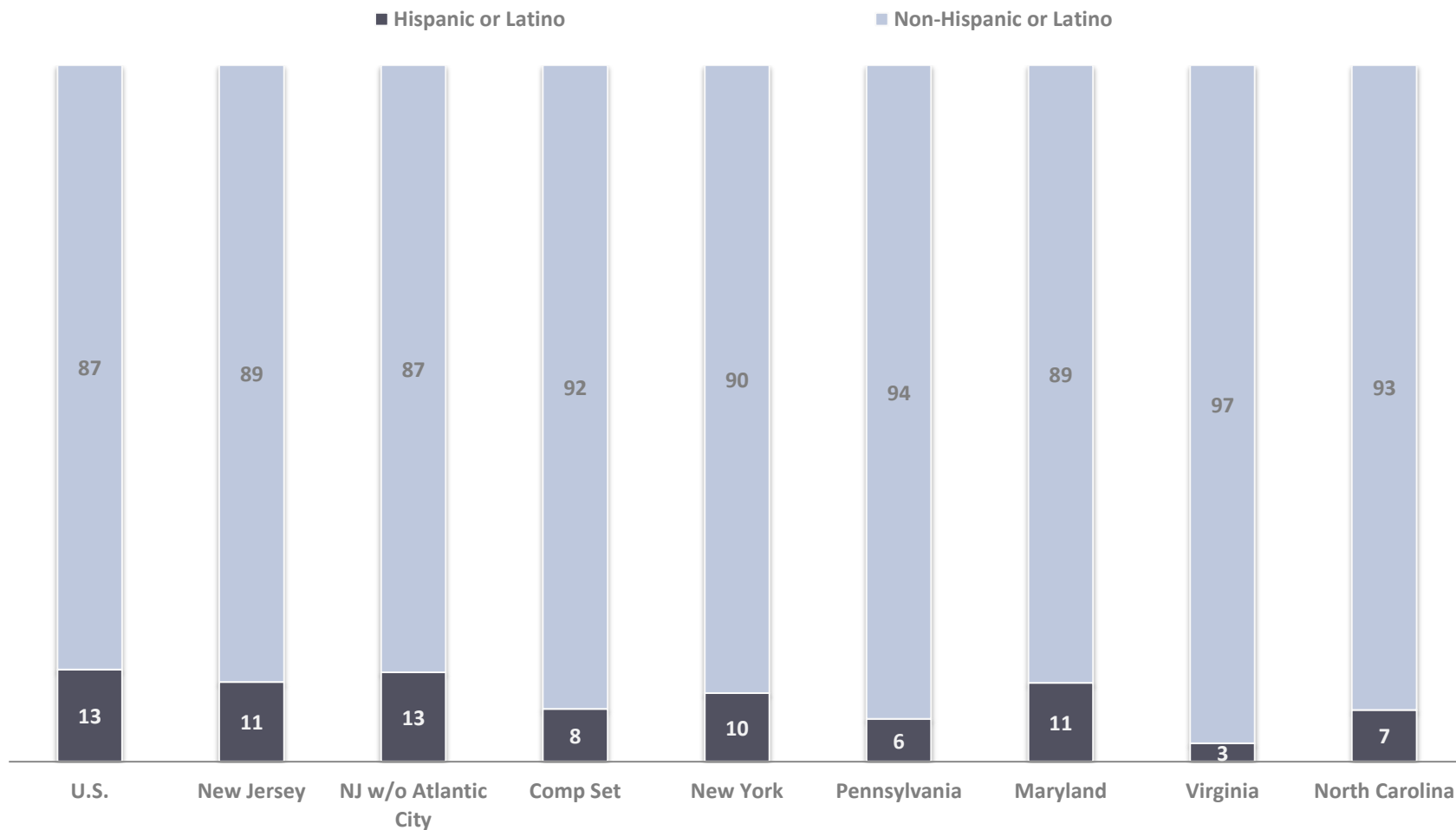


Chart 13 • Segment: 2014 Overnight Leisure Person-Stays (%) • New Jersey N = 1,139 household count

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

DEMOGRAPHICS

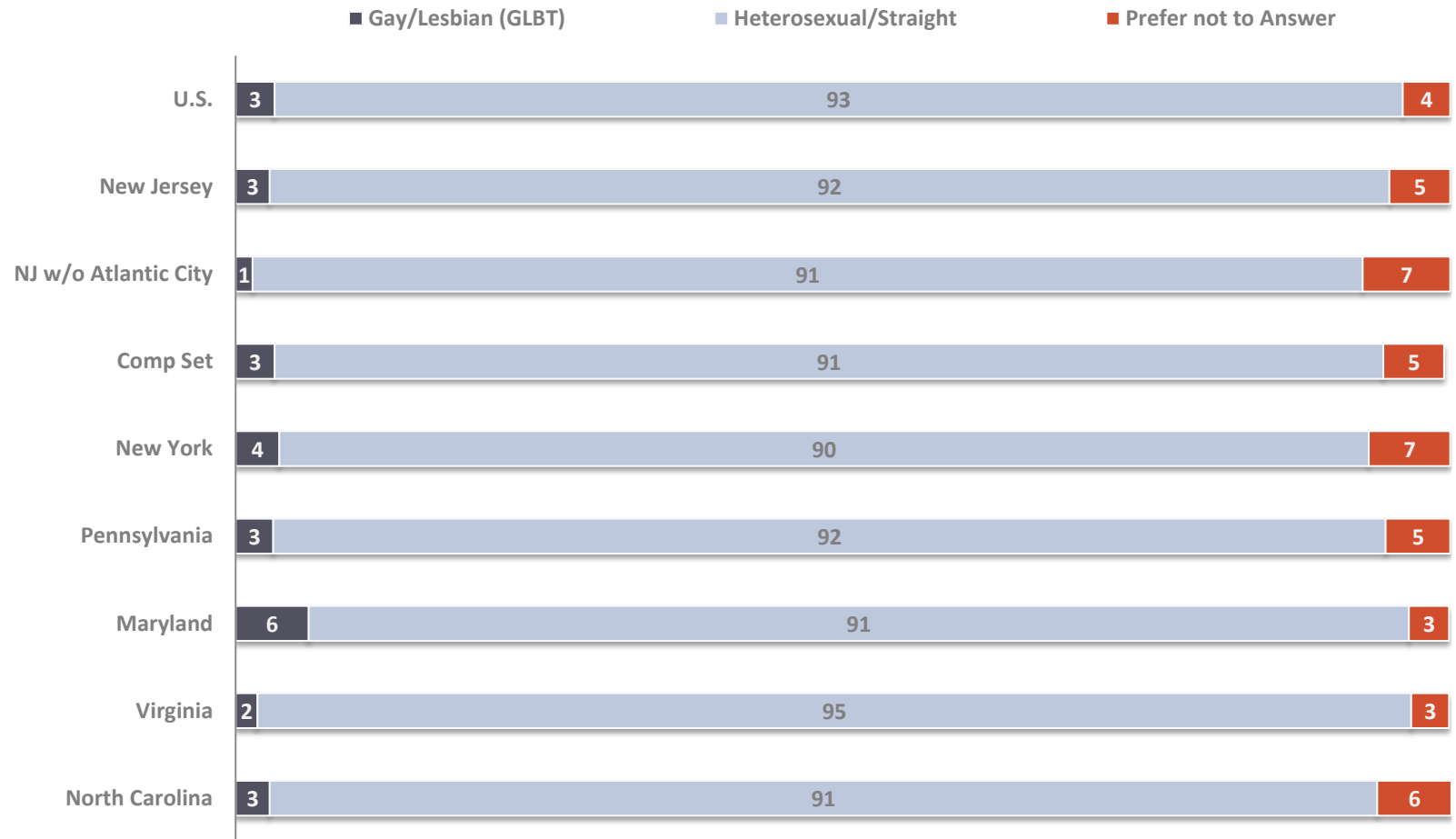


Chart 14 • Segment: 2014 Overnight Leisure Person-Stays (%) • New Jersey N = 1,150 household count

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

DEMOGRAPHICS

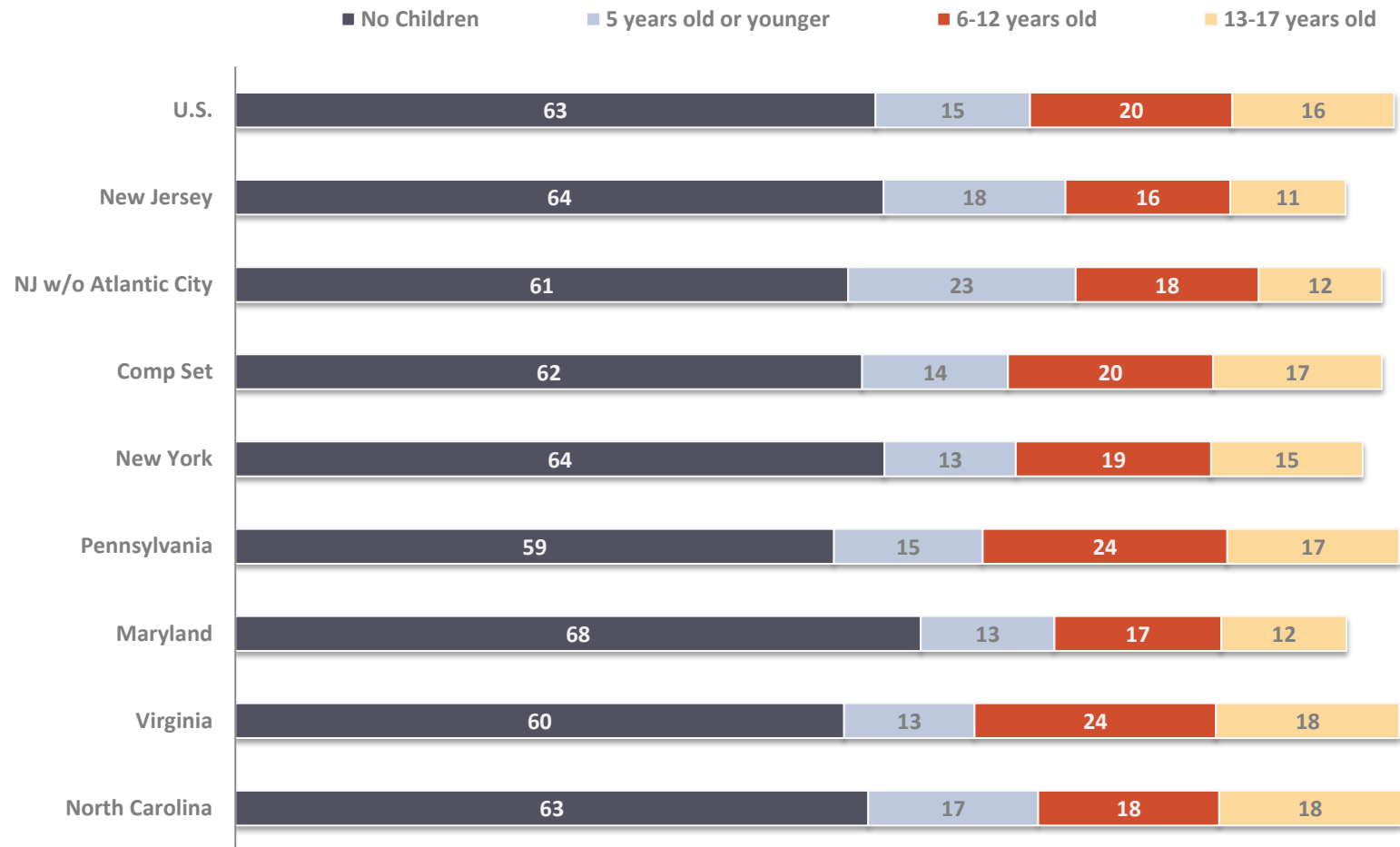


Chart 15 • Segment: 2014 Overnight Leisure Person-Stays (%) • New Jersey N = 1,150 household count

GLOSSARY

Sum exceeds 100% due to multiple-children households.

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

DEMOGRAPHICS

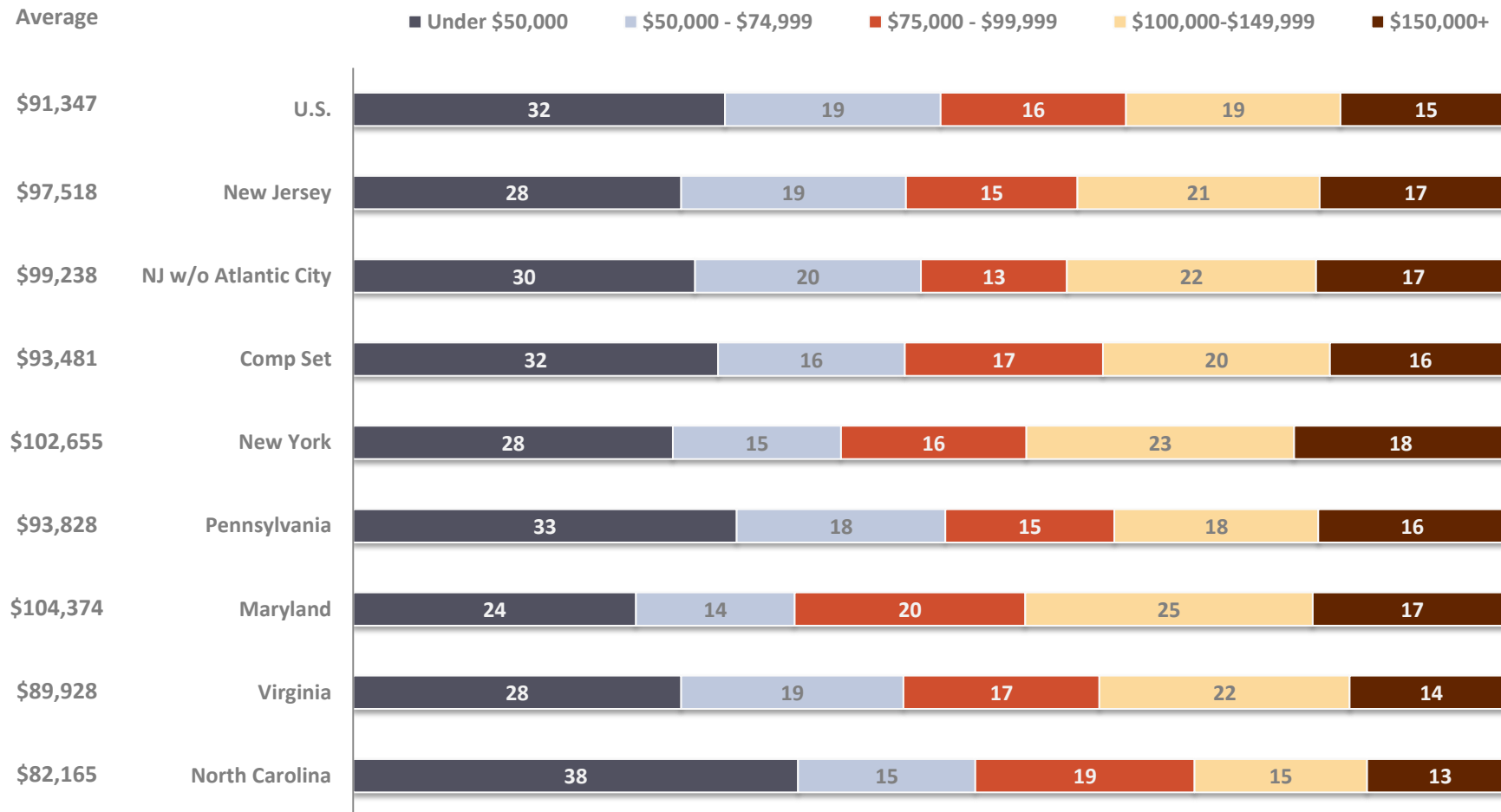


Chart 16 • Segment: 2014 Overnight Leisure Person-Stays (%) • New Jersey N = 1,150 household count

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

DEMOGRAPHICS

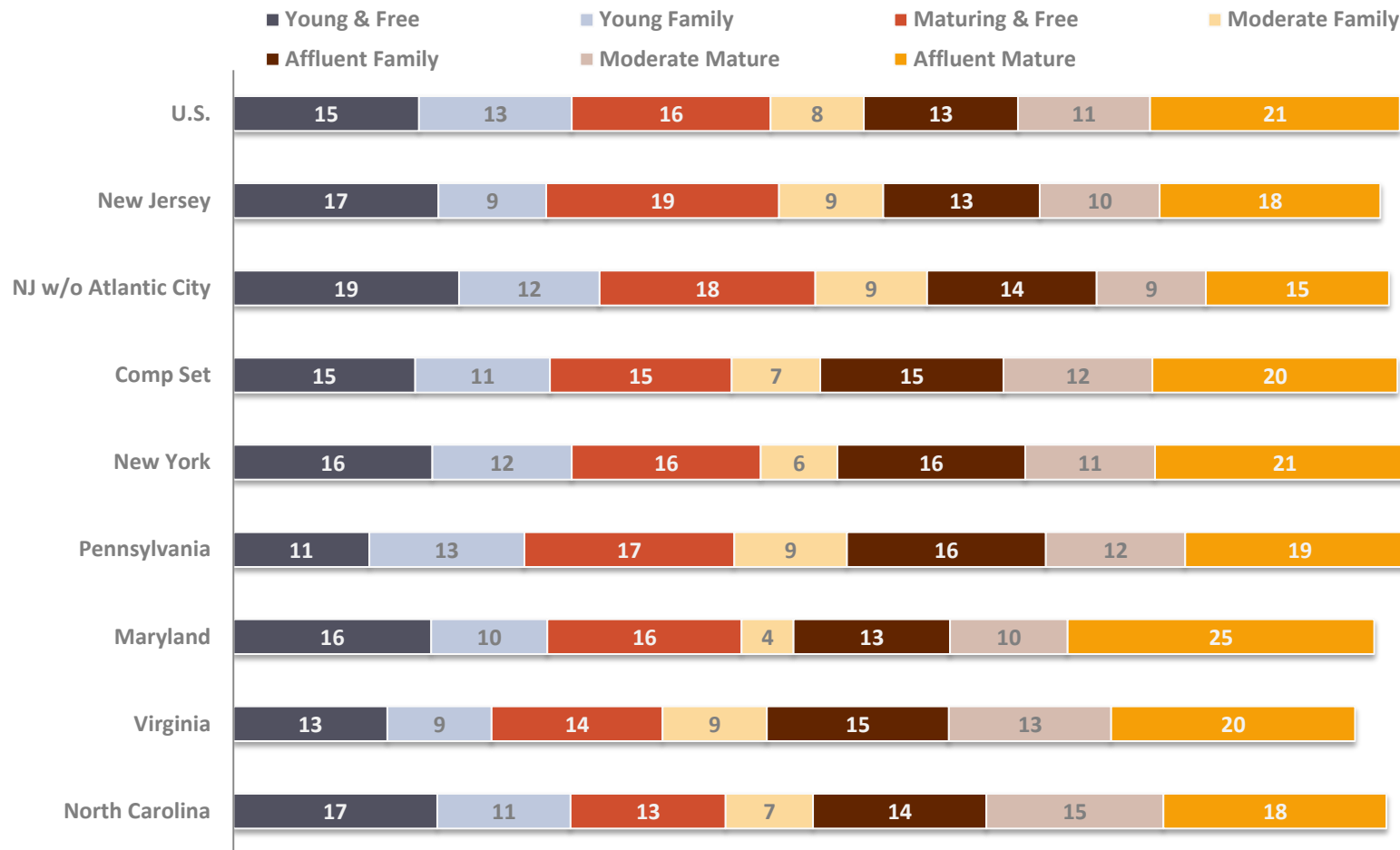


Chart 17 • Segment: 2014 Overnight Leisure Person-Stays (%) • New Jersey N = 1,150 household count

New Jersey Avg. Party per Stay Spending by Lifestage

DEMOGRAPHICS

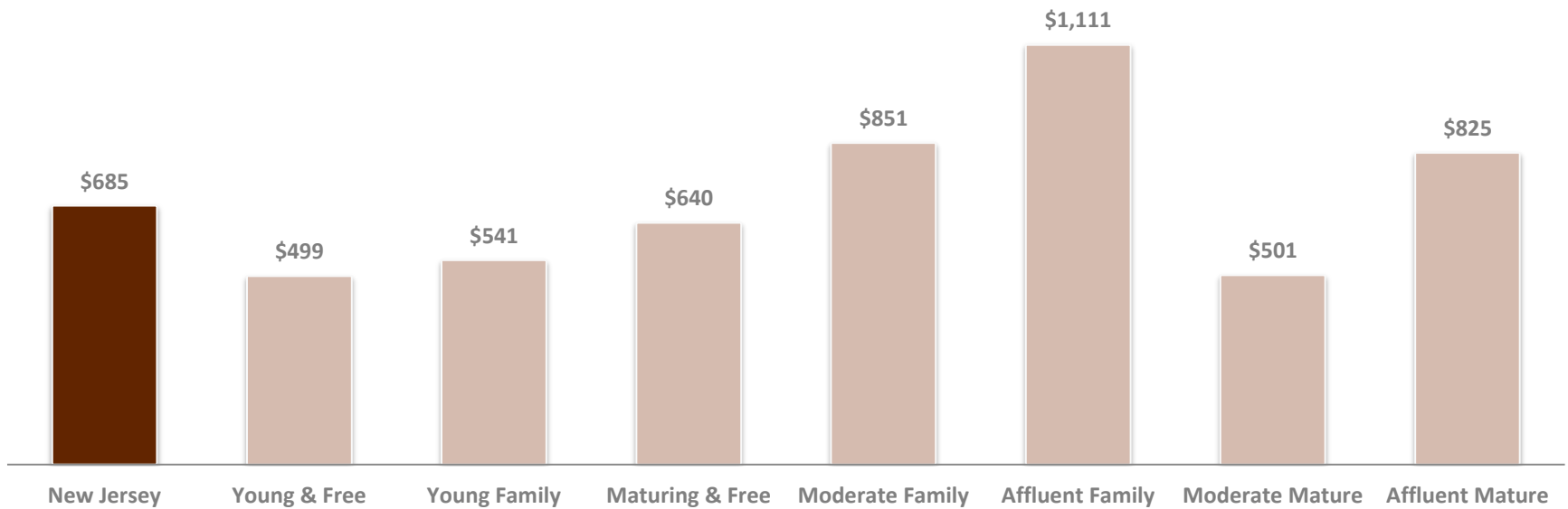


Chart 18 • Segment: 2012-2014 Overnight Leisure Stays (\$) • New Jersey N = 4,004 household count

New Jersey Lifestage Comparison

DEMOGRAPHICS

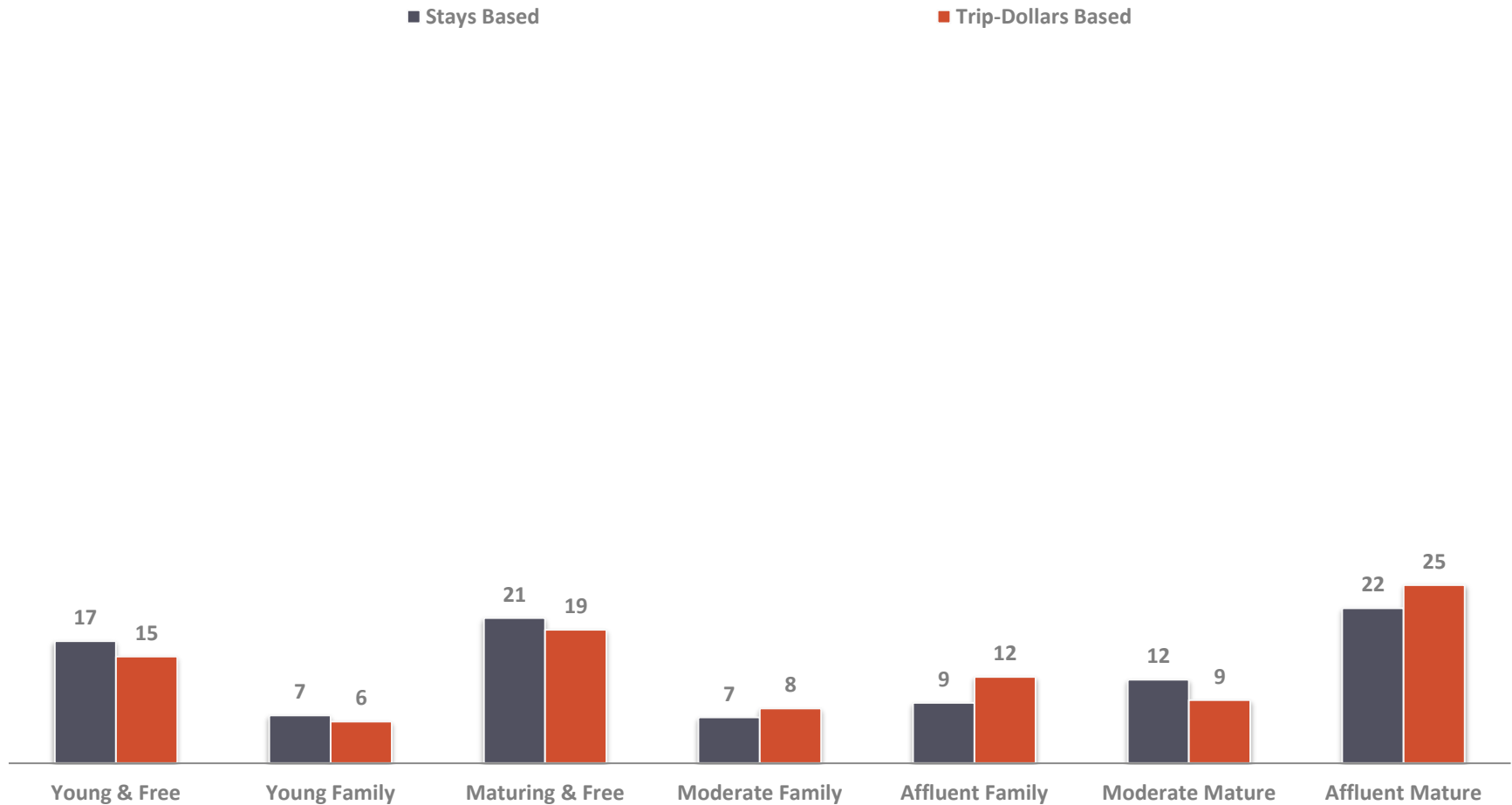


Chart 19 • Segment: 2012-2014 Overnight Leisure (%) • New Jersey N = 4,216 household count

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

DEMOGRAPHICS

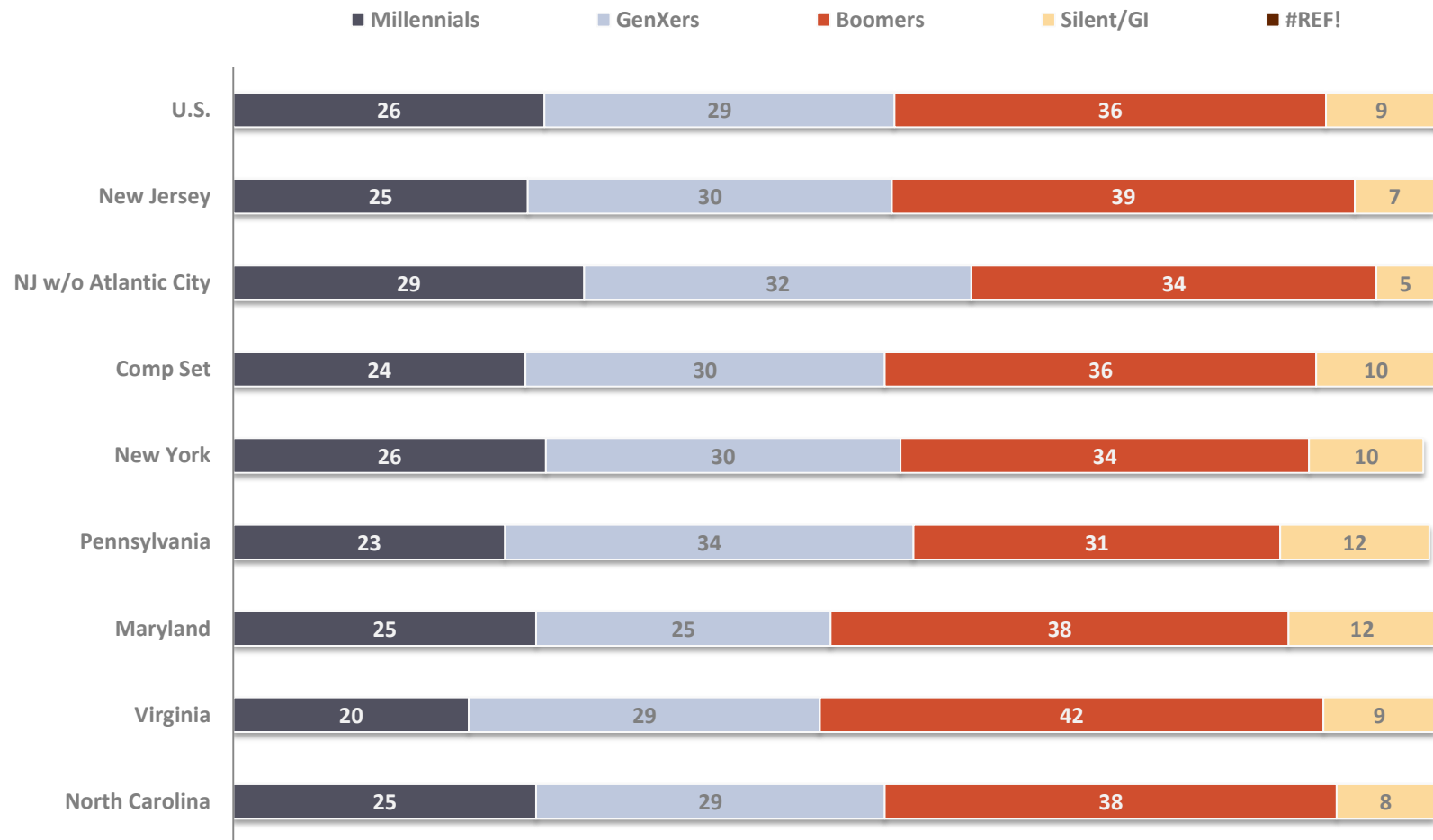


Chart 20 • Segment: 2014 Overnight Leisure Person-Stays (%) • New Jersey N = 1,150 household count

New Jersey Avg. Party per Stay Spending by Generation

DEMOGRAPHICS

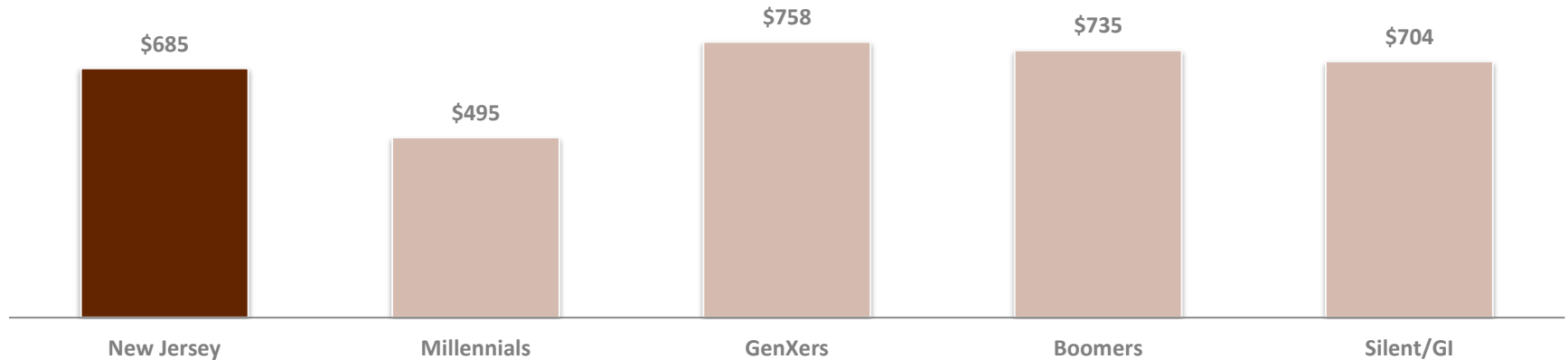


Chart 21 • Segment: 2012-2014 Overnight Leisure Stays (\$) • New Jersey N = 4,004 household count

New Jersey Traveler Generation Comparison

DEMOGRAPHICS

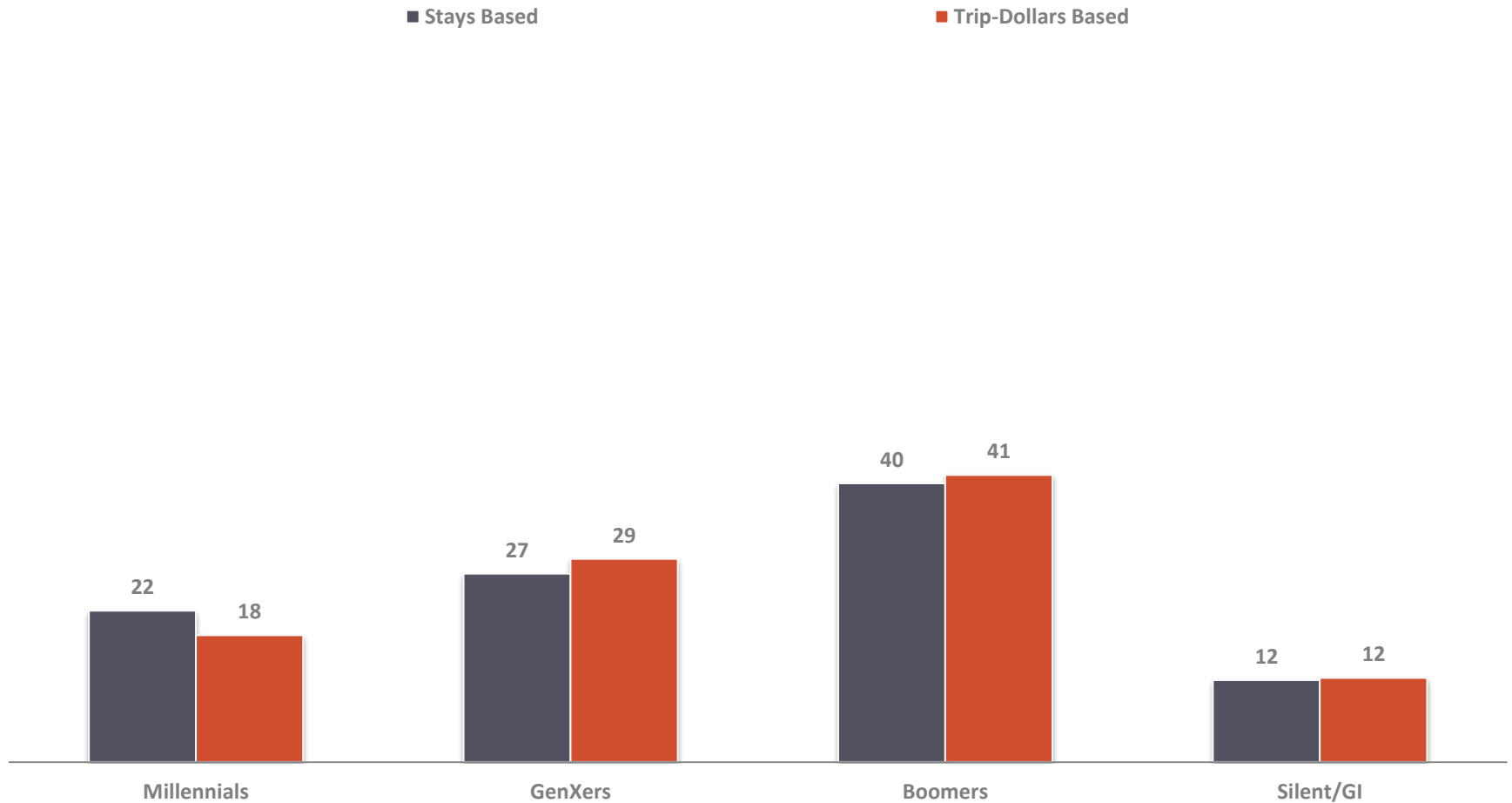
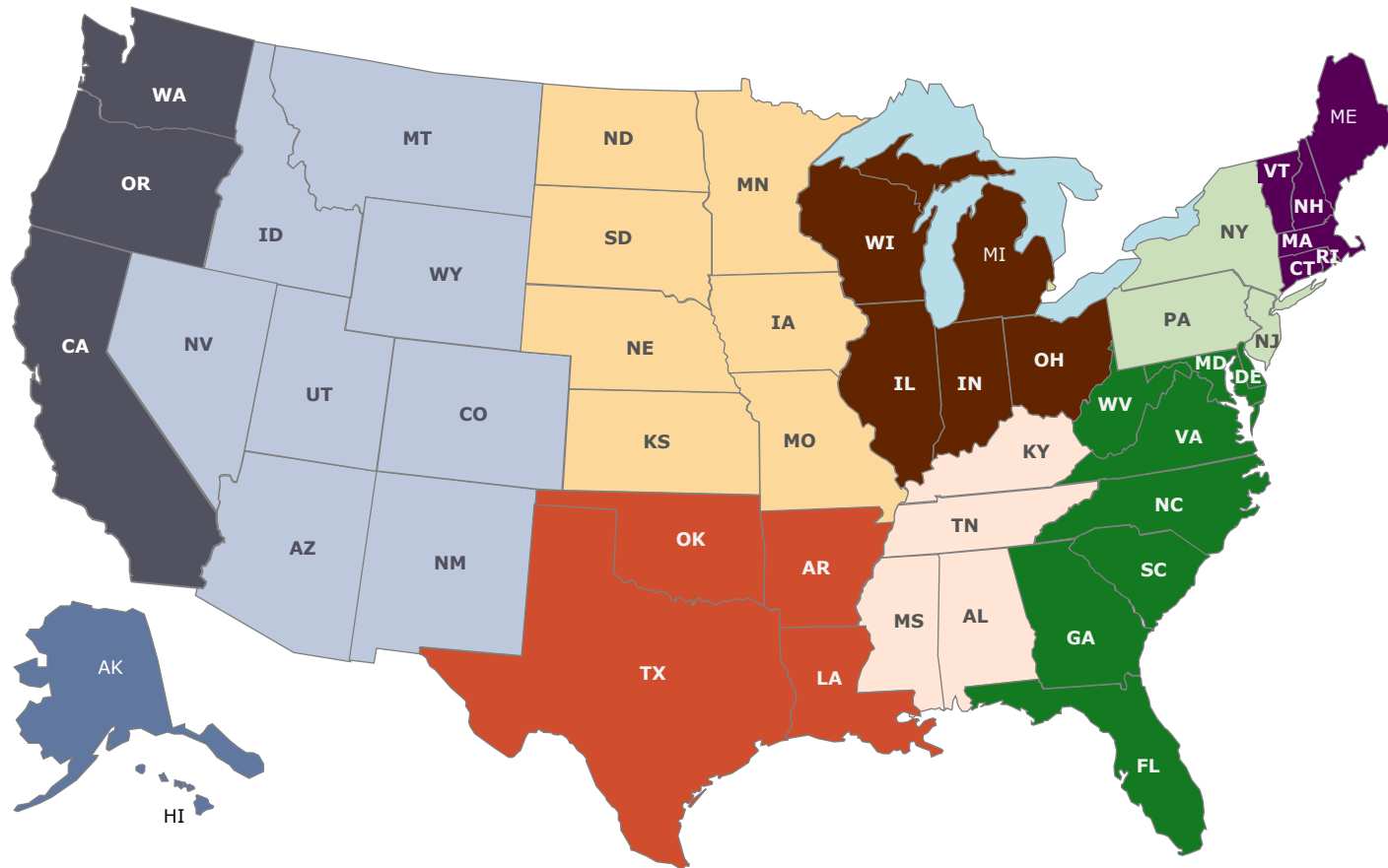


Chart 22 • Segment: 2012-2014 Overnight Leisure (%) • New Jersey N = 4,216 household count

Origin Divisions for Travel to New Jersey

TRIP ORIGIN



LEGEND

Pacific	1.5%
Mountain	0.5%
West North Central	0.5%
West South Central	1.0%
East North Central	4.4%
East South Central	1.1%
New England	4.4%
Middle Atlantic	69.8%
South Atlantic	16.9%

Chart 23 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,148 household count

Top Origin States to New Jersey

TRIP ORIGIN

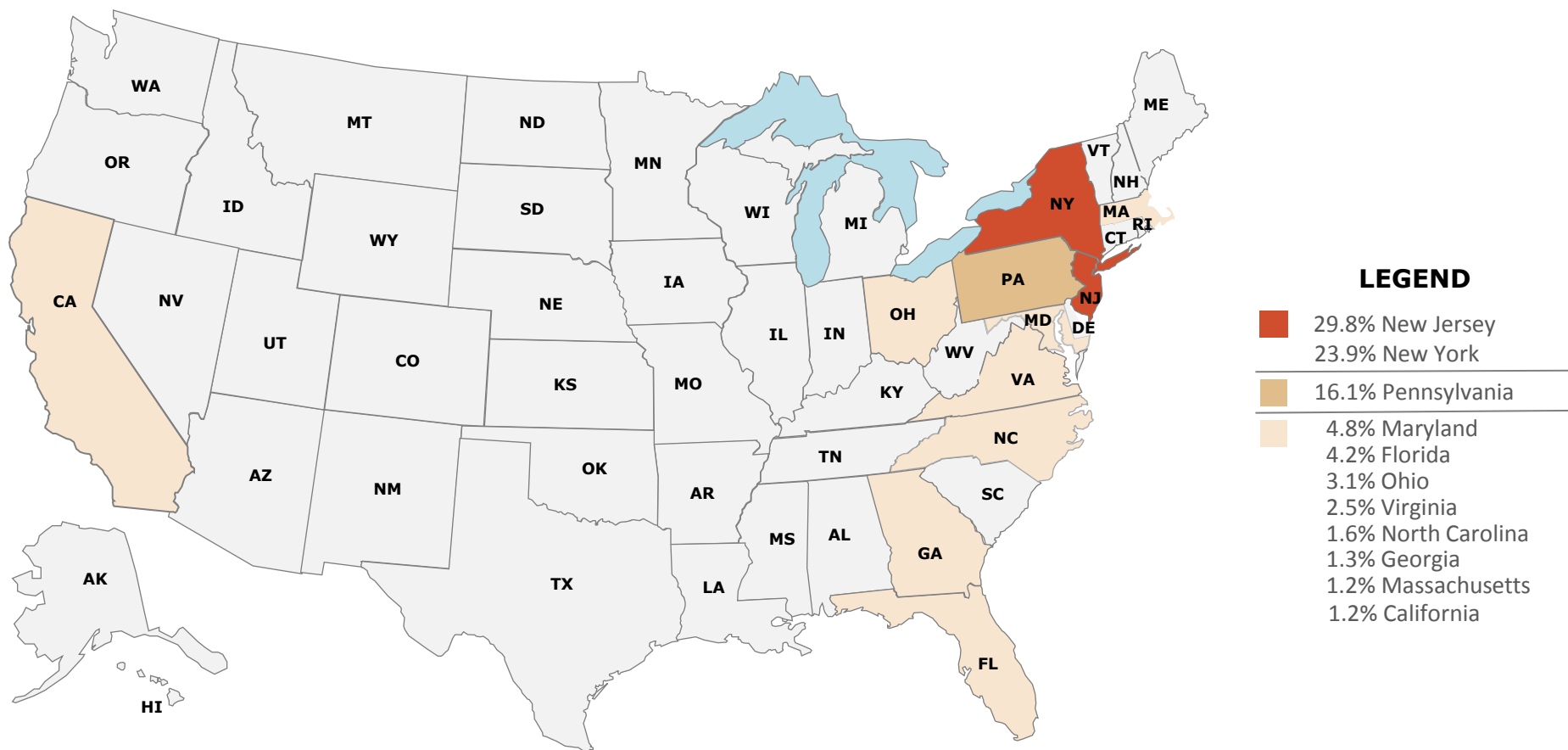


Chart 24 • Segment: 2013 Overnight Leisure Person-Stays (%) • New Jersey N = 1,148 household count

Top Origin DMAs to New Jersey

TRIP ORIGIN

	U.S.	New Jersey	NJ w/o Atlantic City	New York	Pennsylvania	Maryland	Virginia	North Carolina
New York, NY	5.6%	38.0%	35.0%	19.5%	18.1%	18.1%	7.3%	4.1%
Philadelphia, PA	2.4%	21.9%	20.7%	3.2%	12.4%	8.5%	4.5%	2.4%
Washington, DC (Hagerstown, MD)	2.0%	3.2%	4.1%	3.2%	6.1%	14.8%	12.9%	3.9%
Baltimore, MD	1.1%	3.1%	2.4%	1.4%	5.4%	12.6%	1.6%	1.9%
Wilkes Barre-Scranton, PA	0.5%	3.1%	3.7%	2.0%	3.1%	1.1%	0.7%	0.3%
Harrisburg-Lancaster- Lebanon-York, PA	0.7%	2.8%	3.0%	1.1%	8.7%	2.3%	2.8%	0.4%
Albany-Schenectady-Troy, NY	0.6%	2.4%	1.7%	3.7%	0.5%	1.1%	0.9%	0.7%
Columbus, OH	0.8%	2.0%	3.1%	0.2%	0.4%	0.6%	1.6%	0.7%
Boston, MA (Manchester, NH)	1.8%	2.0%	2.7%	4.9%	1.9%	1.0%	1.5%	1.1%
Tampa-St. Petersburg (Sarasota), FL	1.5%	1.3%	0.3%	1.3%	1.2%	0.7%	1.0%	0.7%
Top 10 Sum	17.0%	79.8%	76.7%	40.5%	57.8%	60.8%	34.8%	16.2%

Chart 25 • Segment: 2014 Overnight Leisure Person-Stays (%) • New Jersey N = 1,145 household count

New Jersey Avg. Party per Stay Spending by Origin DMA

TRIP ORIGIN

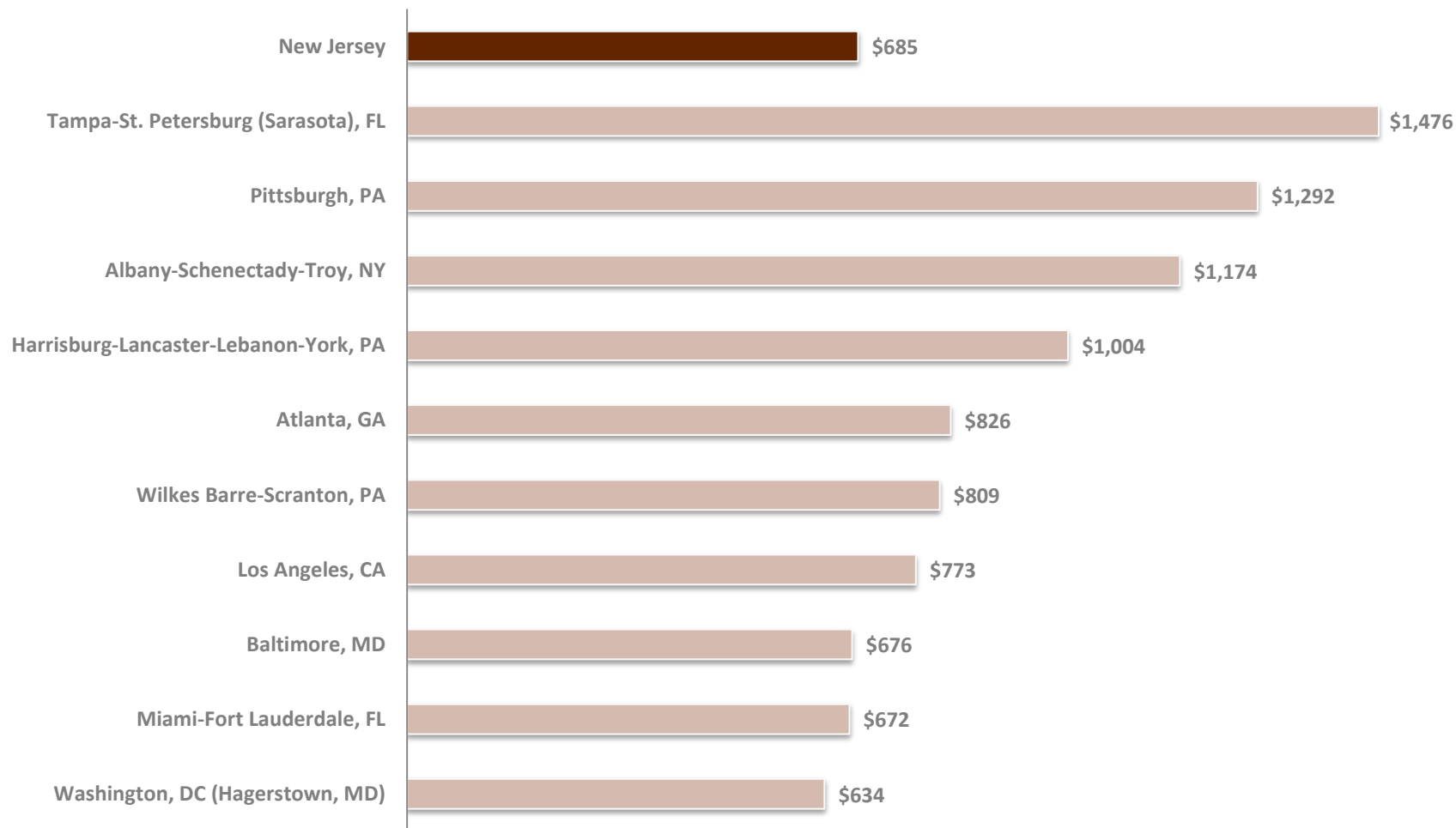


Chart 26 • Segment: 2012-2014 Overnight Leisure Stays (\$) • New Jersey N = 3,997 household count

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

TRIP ORIGIN

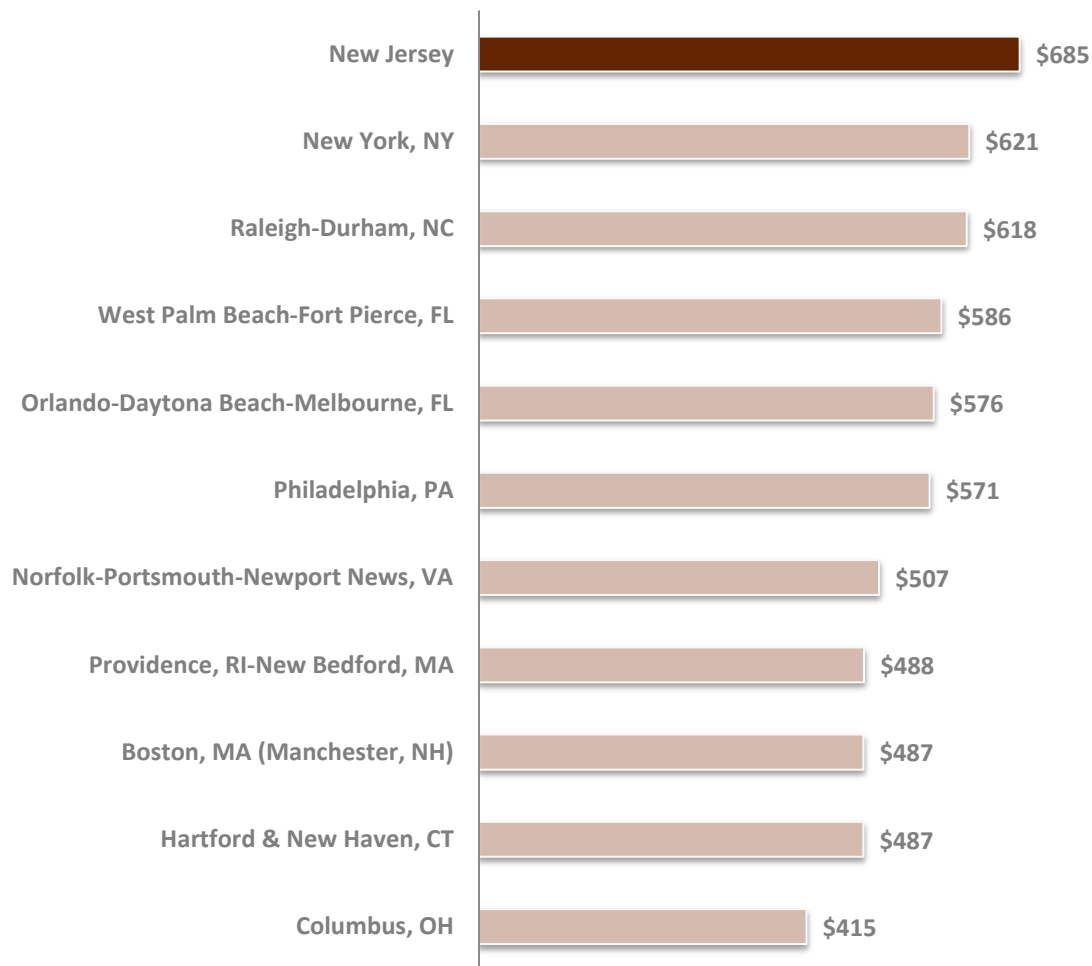


Chart 27 • Segment: 2012-2014 Overnight Leisure Stays (\$) • New Jersey N = 3,997 household count

New Jersey Origin DMA Comparison

TRIP ORIGIN

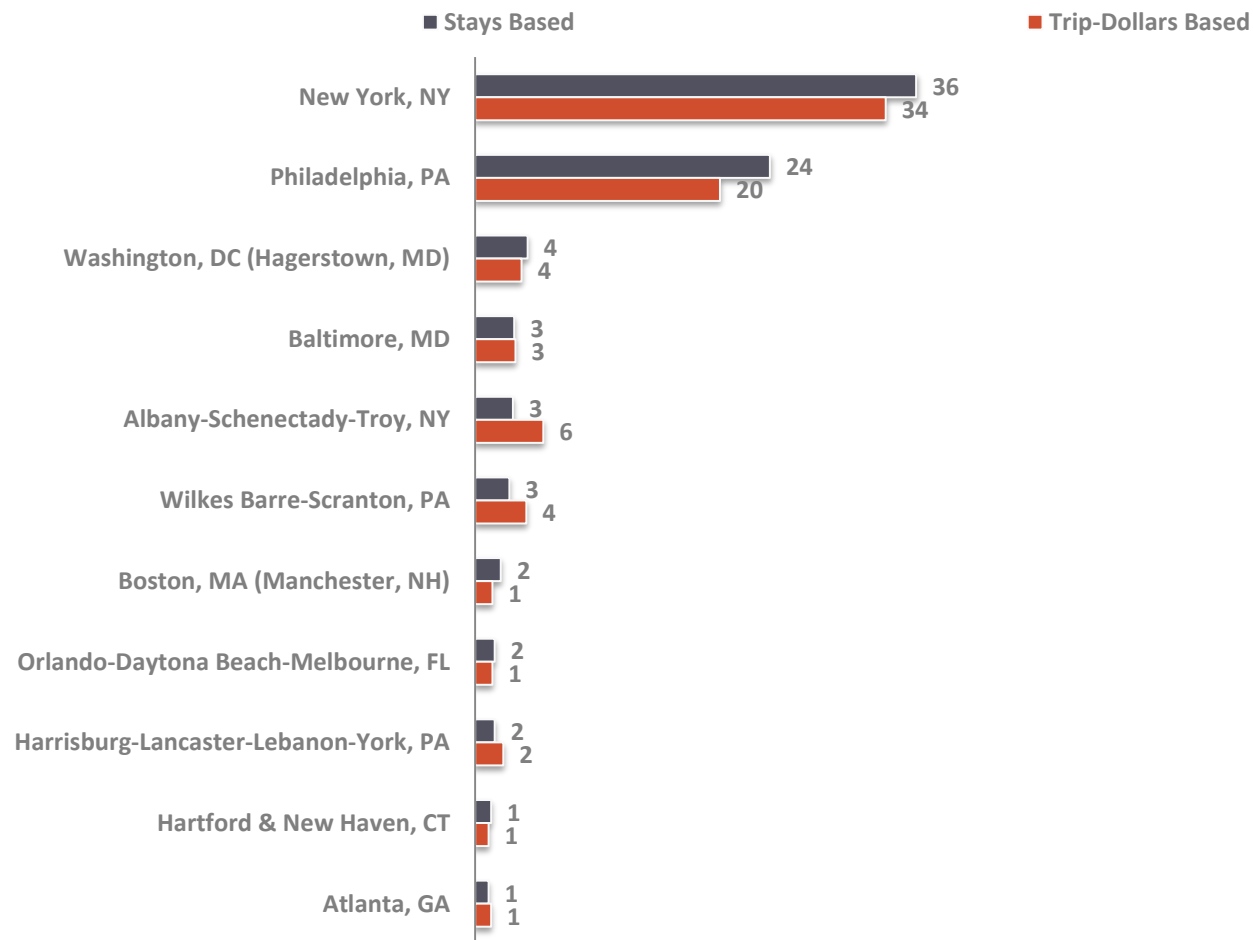


Chart 28 • Segment: 2012-2014 Overnight Leisure (%) • New Jersey N = 4,208 household count

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

TRANSPORTATION

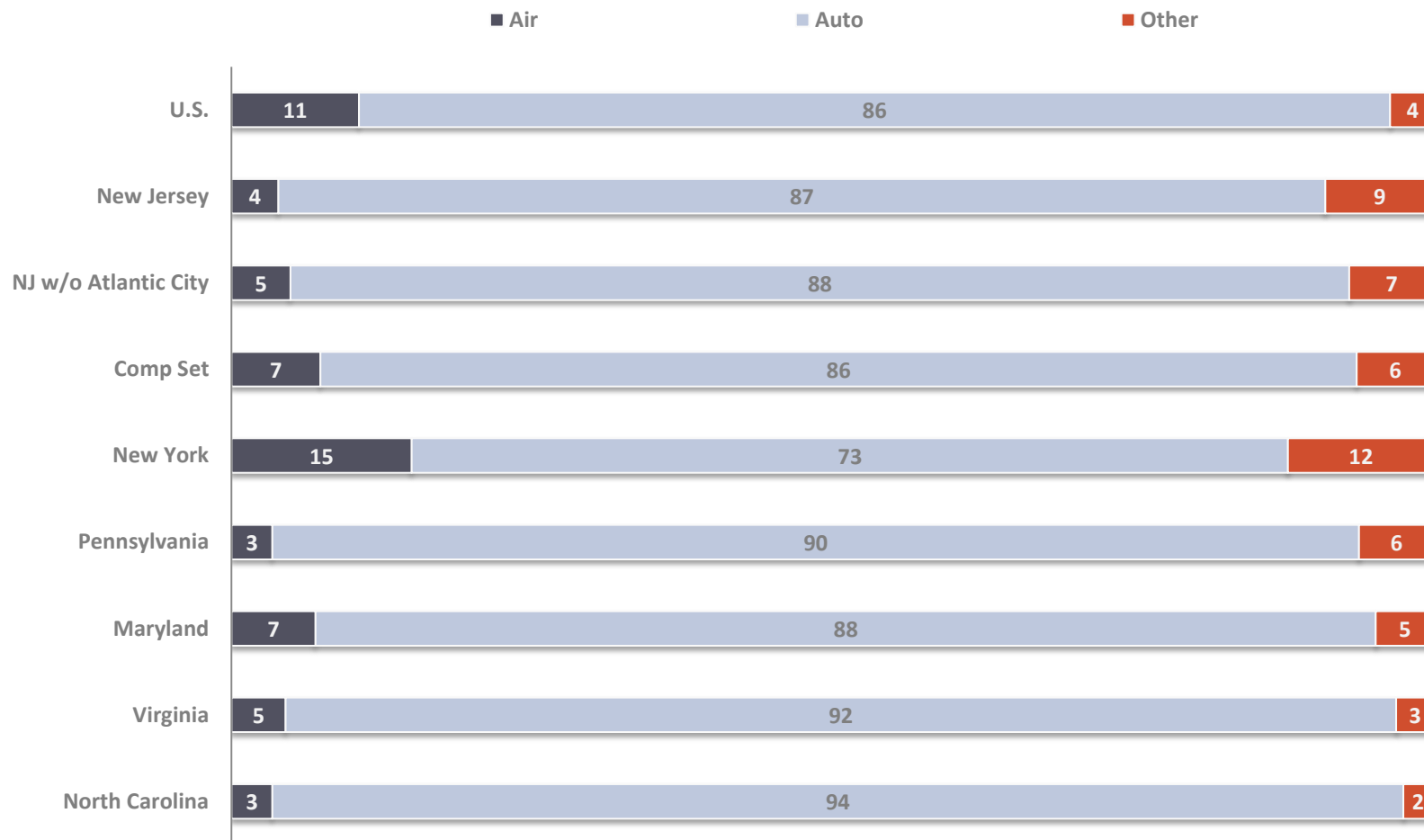


Chart 29 • Segment: 2014 Overnight Leisure Person-Stays (%) • New Jersey N = 1,150 household count

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

TRANSPORTATION

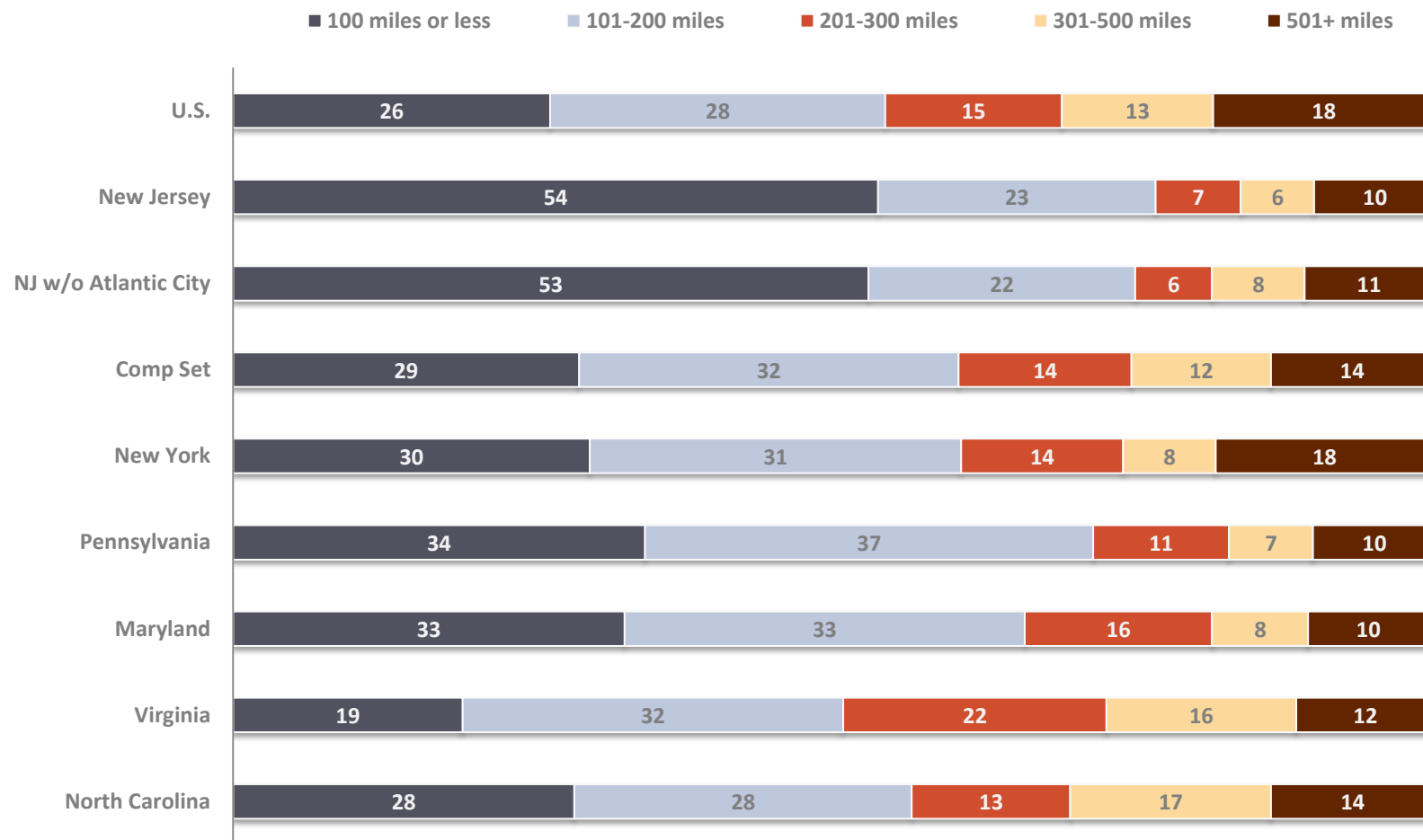


Chart 30 • Segment: 2014 Overnight Leisure Person-Stays (%) • New Jersey N = 934 household count

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

TRANSPORTATION

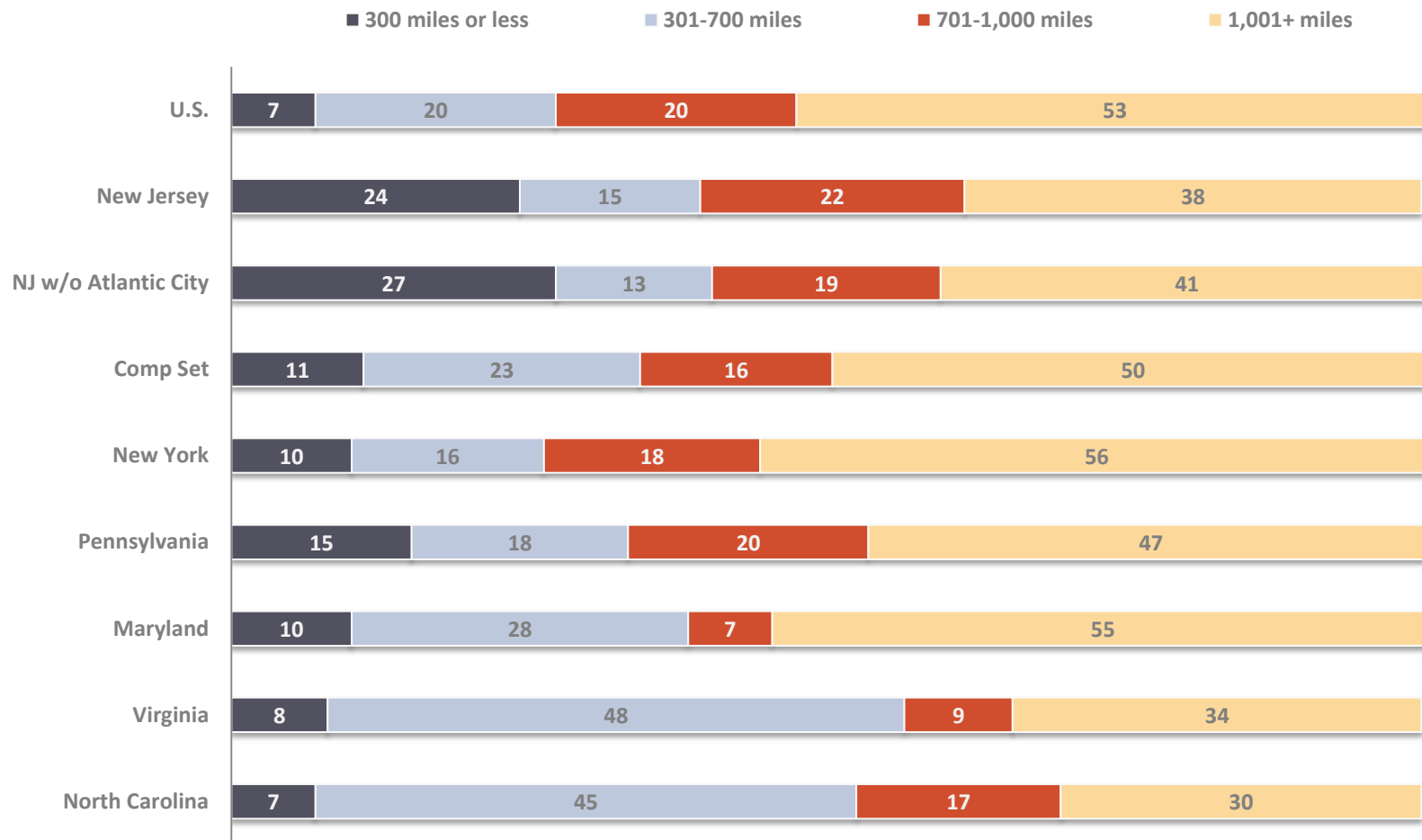


Chart 31 • Segment: 2014 Overnight Leisure Person-Stays (%) • New Jersey N = 142 household count

New Jersey Month Trip Started

TRIP TIMING

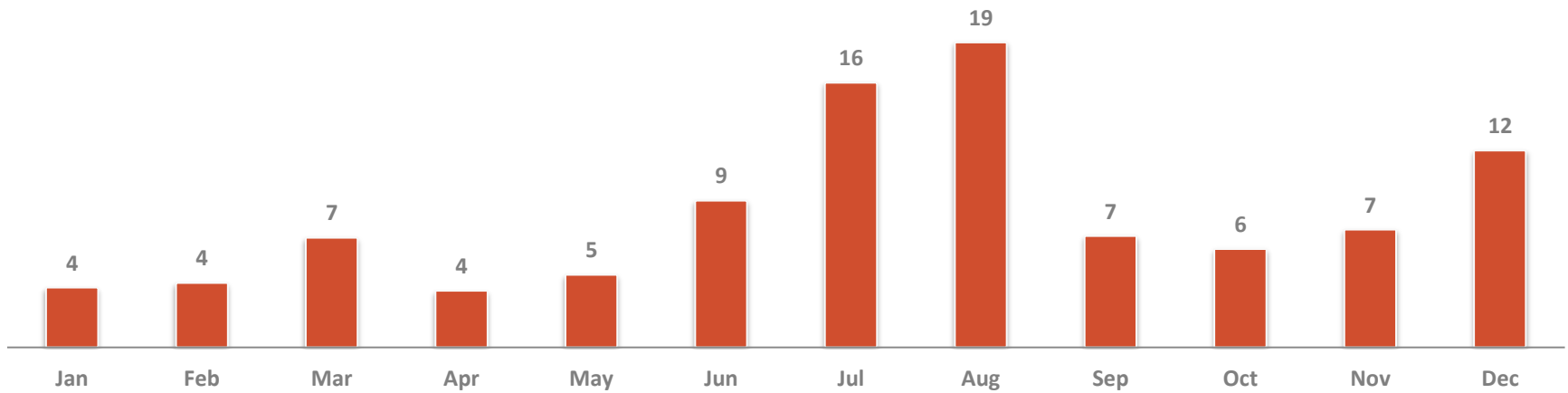


Chart 32 • Segment: 2014 Overnight Leisure Person-Stays (%) • New Jersey N = 1,150 household count

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

TRIP TIMING

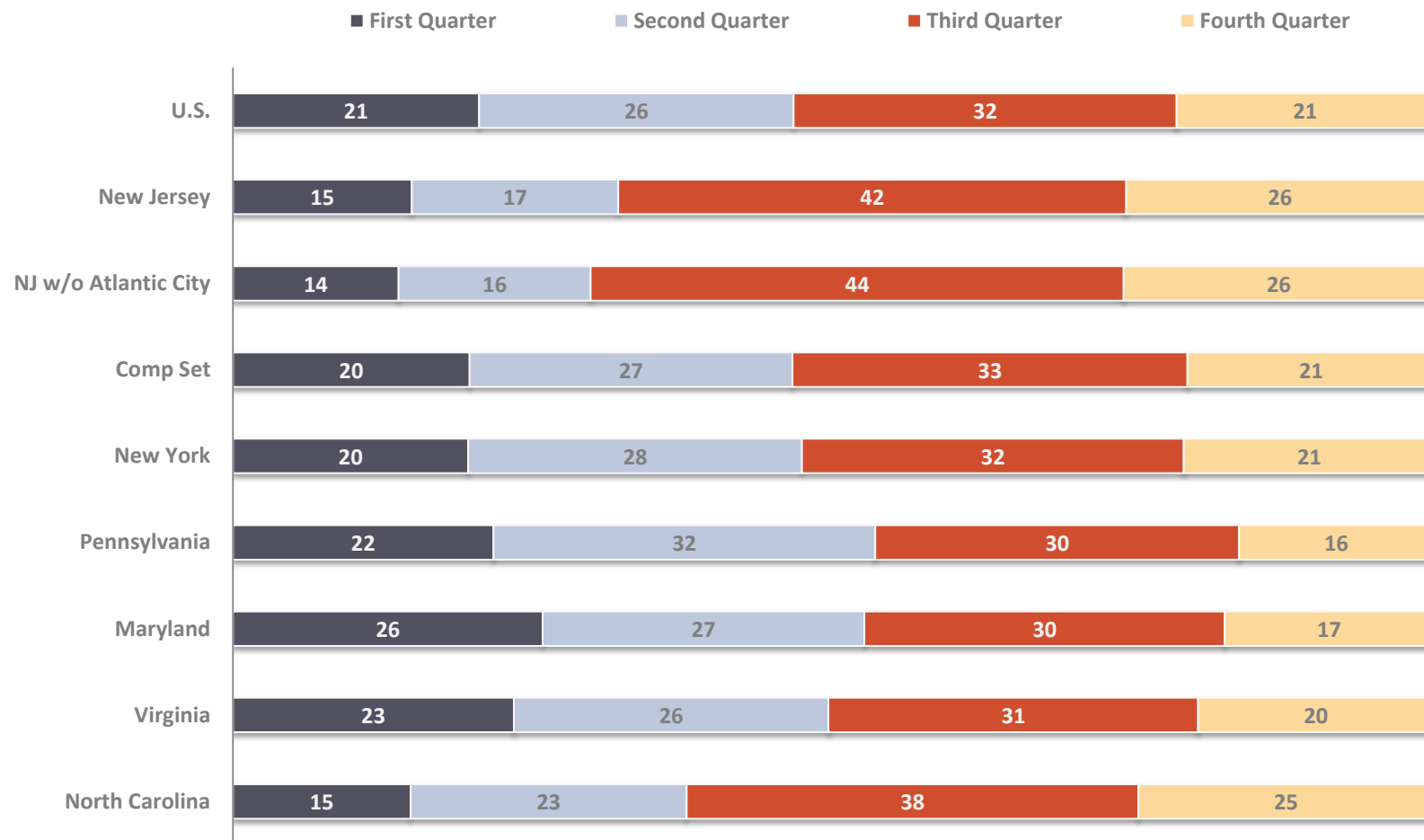


Chart 33 • Segment: 2014 Overnight Leisure Person-Stays (%) • New Jersey N = 1,150 household count

New Jersey Avg. Party per Stay Spending by Quarter

TRIP TIMING

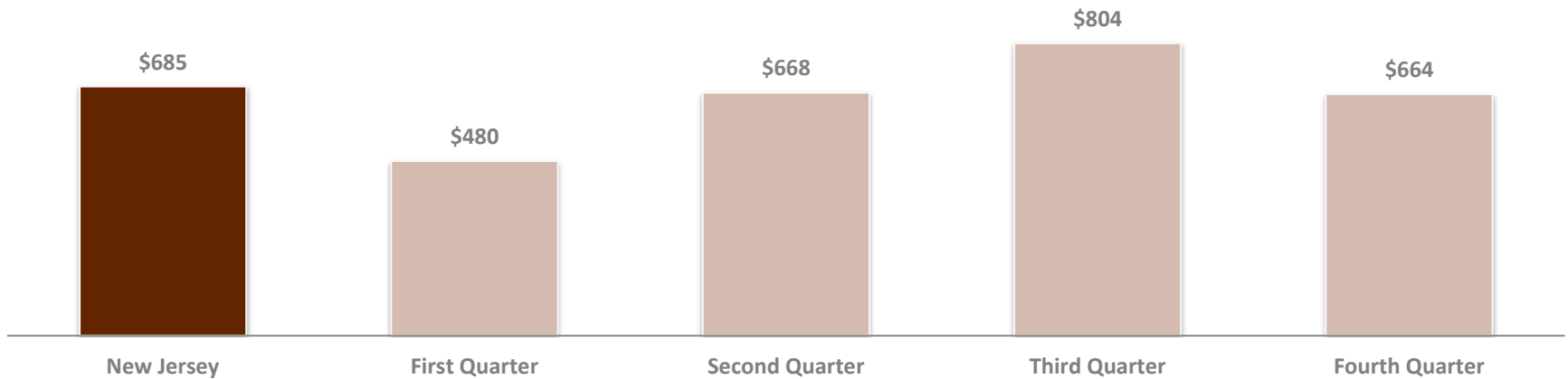


Chart 34 • Segment: 2012-2014 Overnight Leisure Stays (\$) • New Jersey N = 4,004 household count

New Jersey Trip Timing Comparison by Quarter

TRIP TIMING

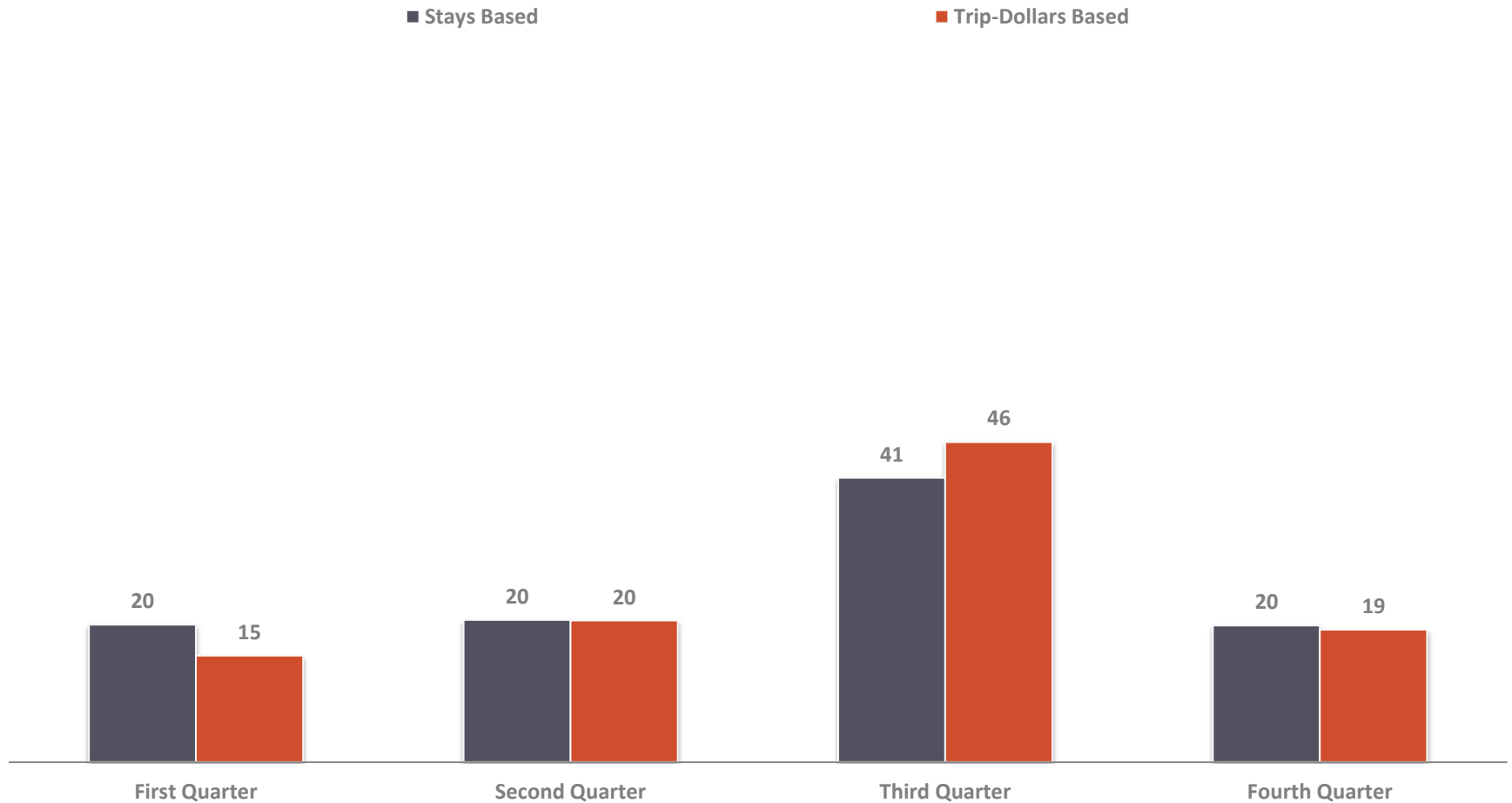


Chart 35 • Segment: 2012-2014 Overnight Leisure (%) • New Jersey N = 4,216 household count

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

TRIP TIMING

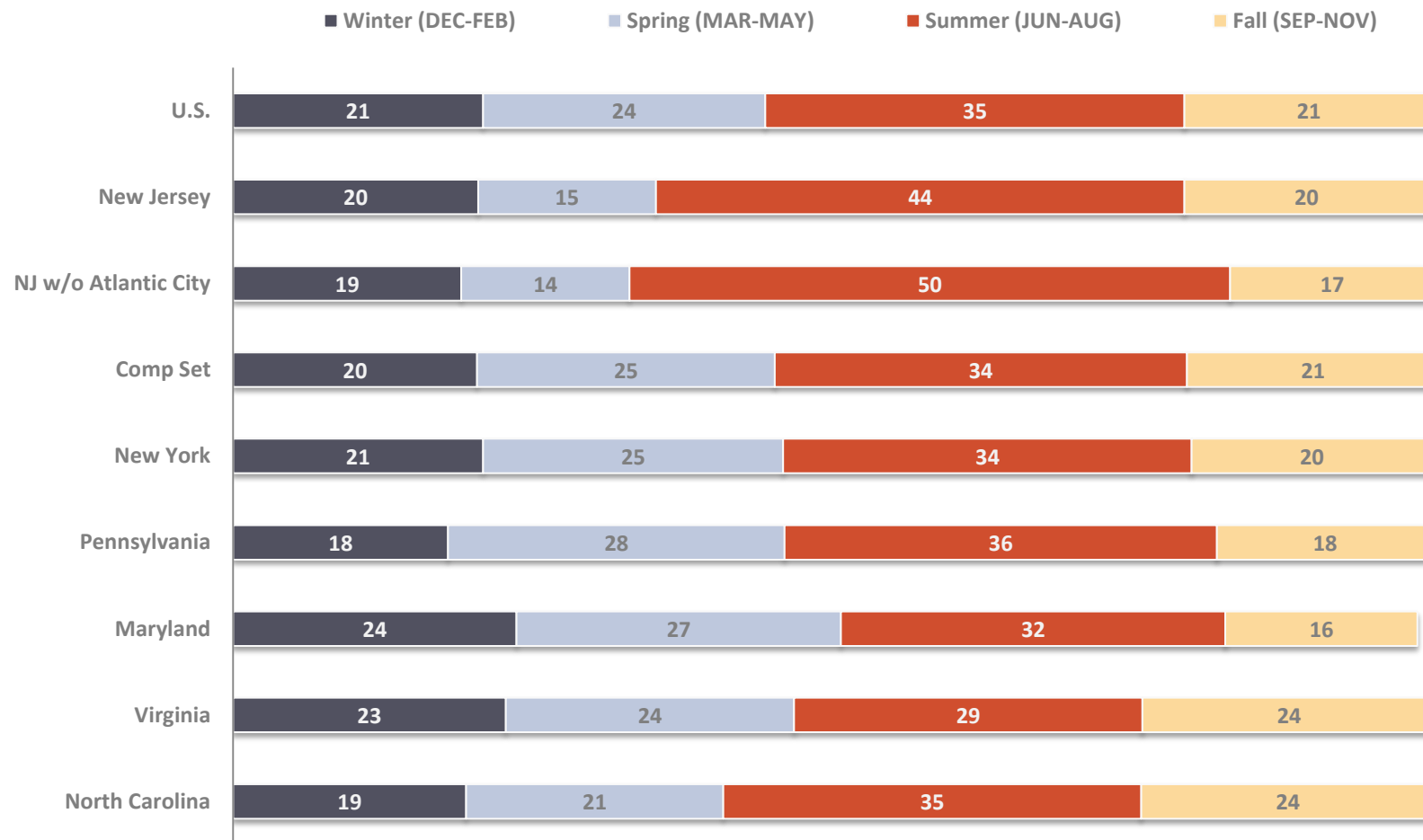


Chart 36 • Segment: 2014 Overnight Leisure Person-Stays (%) • New Jersey N = 1,150 household count

New Jersey Avg. Party per Stay Spending by Season

TRIP TIMING

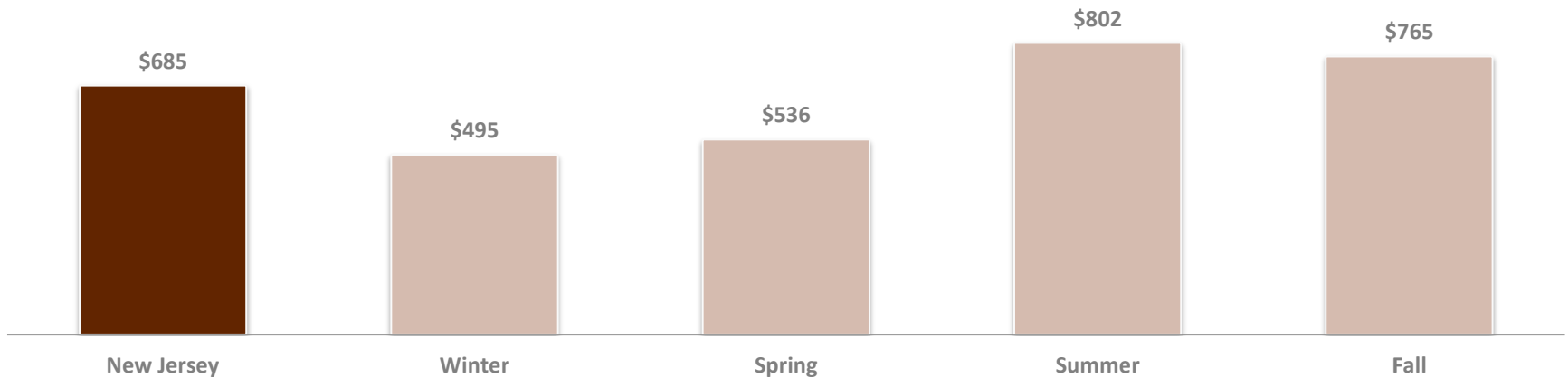


Chart 37 • Segment: 2012-2014 Overnight Leisure Stays (\$) • New Jersey N = 4,004 household count

New Jersey Trip Timing Comparison by Season

TRIP TIMING

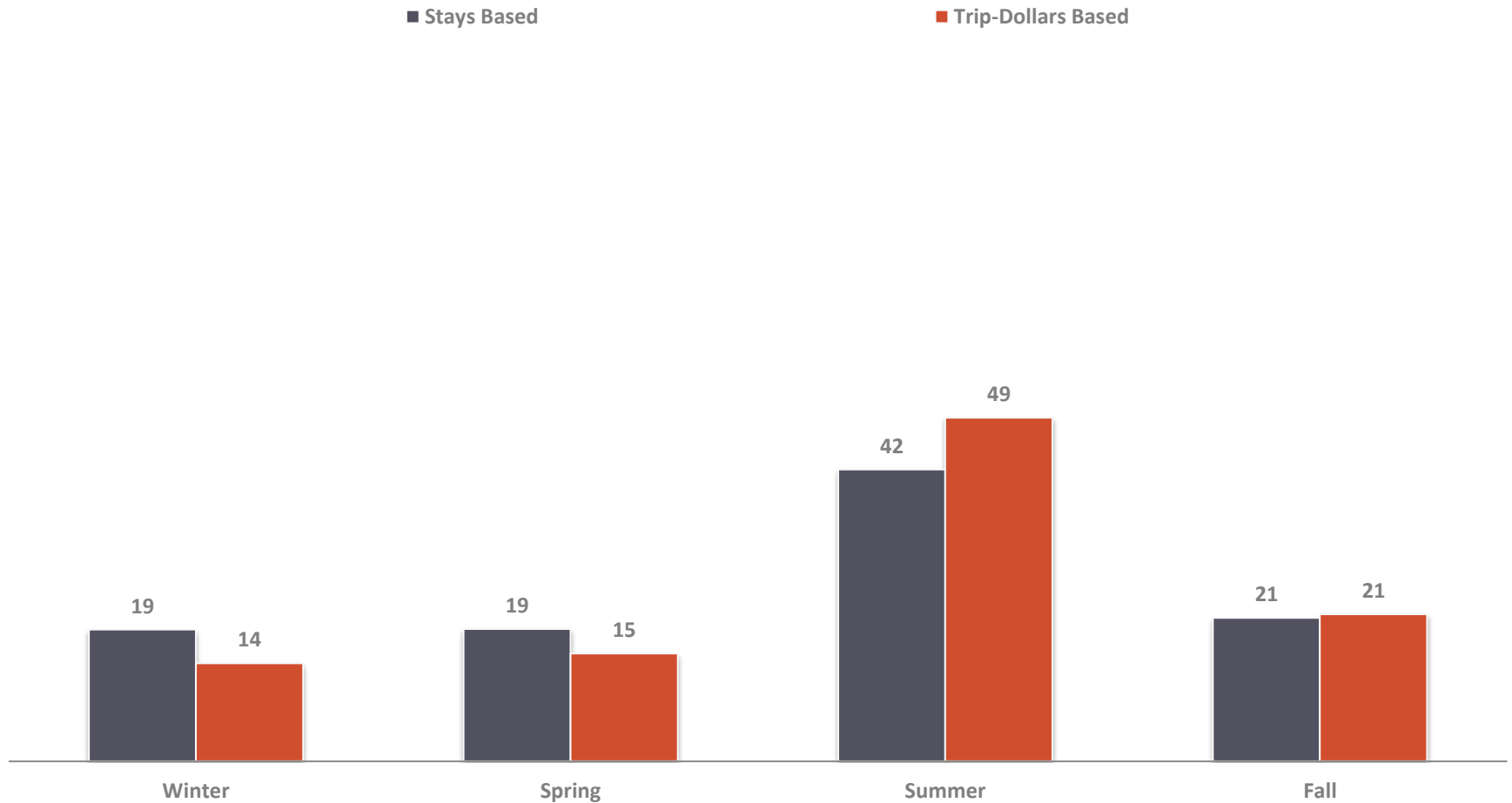


Chart 38 • Segment: 2012-2014 Overnight Leisure (%) • New Jersey N = 4,216 household count

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

TRIP CHARACTERISTICS

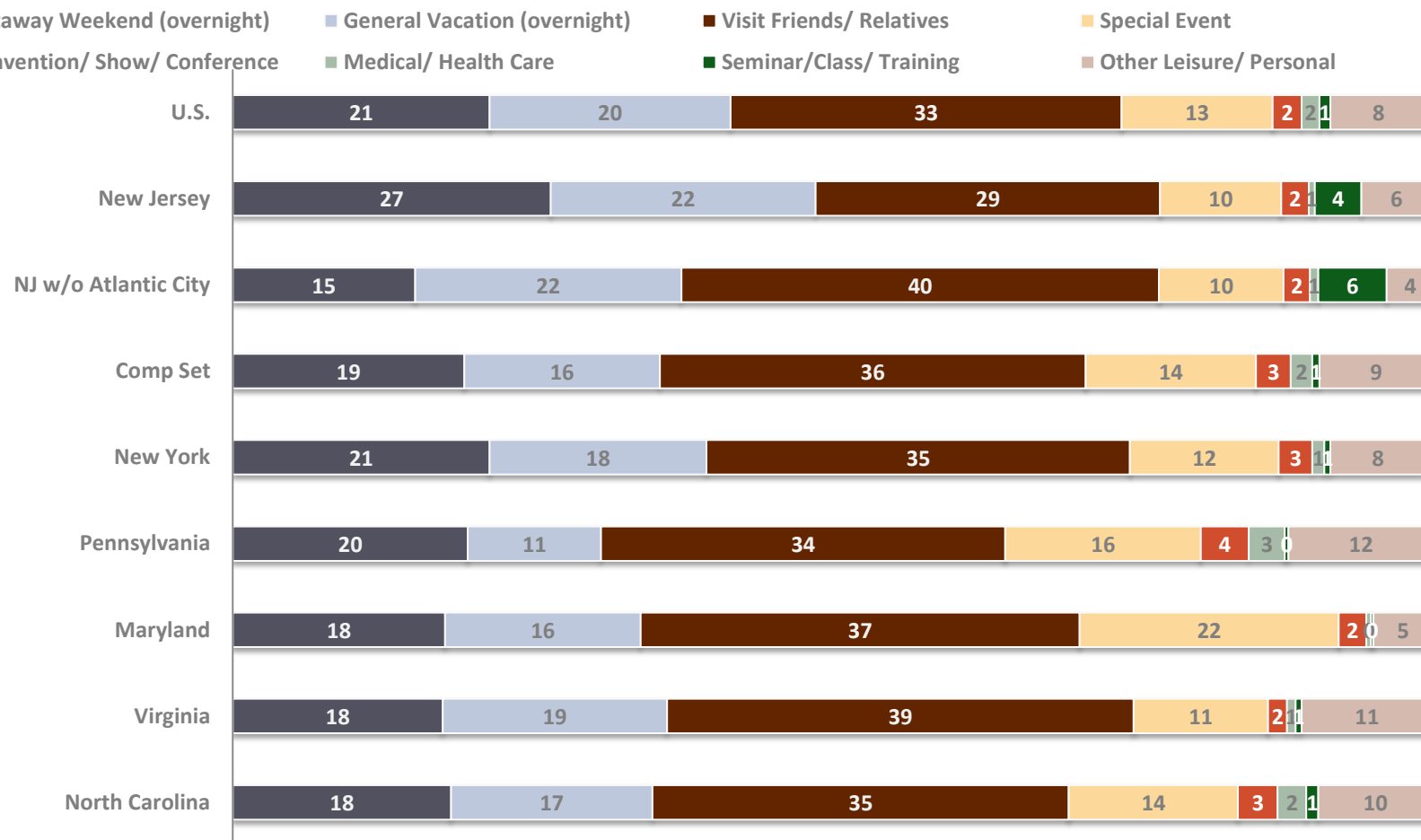


Chart 39 • Segment: 2014 Overnight Leisure Person-Stays (%) • New Jersey N = 1,150 household count

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

TRIP CHARACTERISTICS



Chart 40 • Segment: 2012-2014 Overnight Leisure Stays (\$) • New Jersey N = 4,004 household count

New Jersey Purpose of Stay Comparison

TRIP CHARACTERISTICS

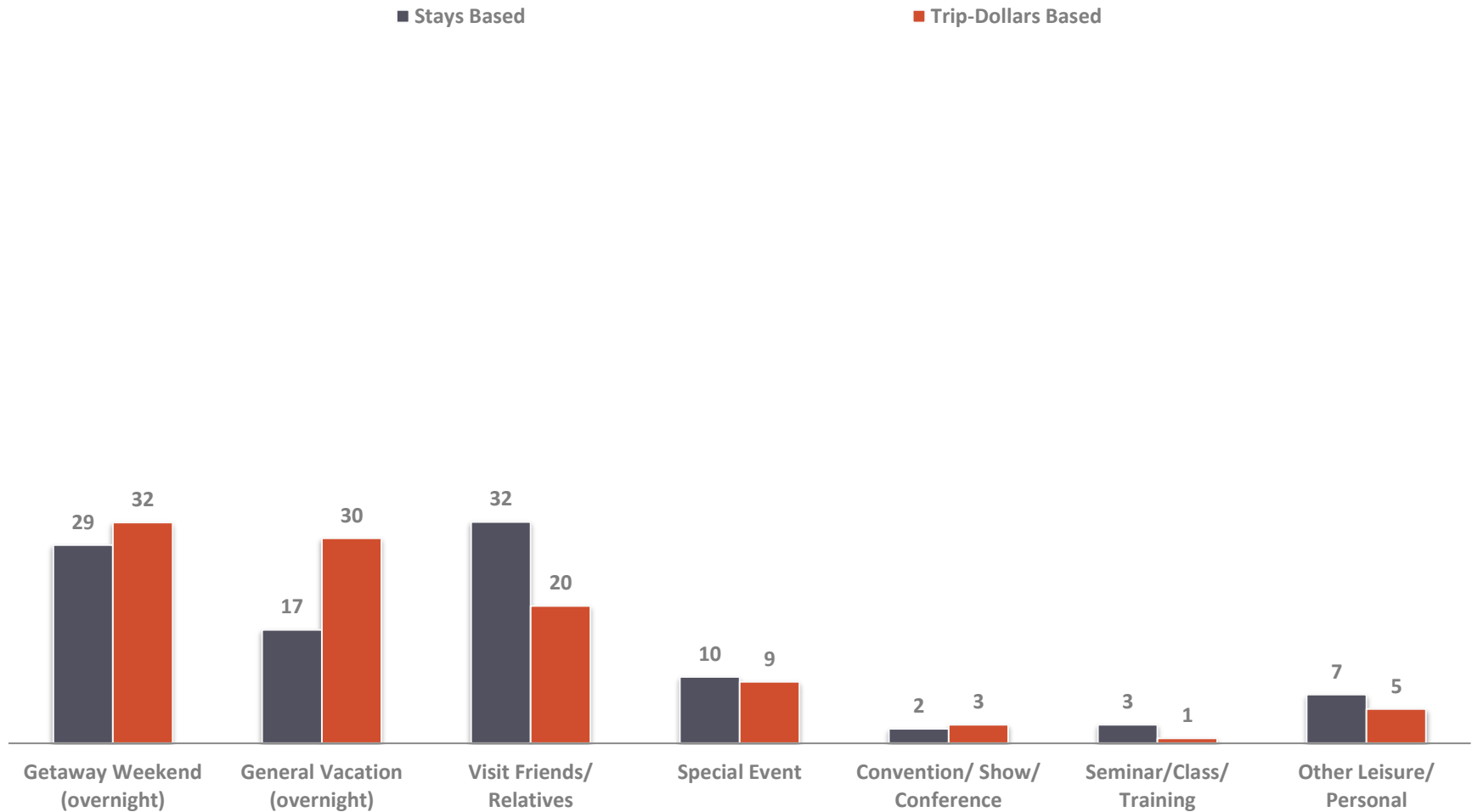


Chart 41 • Segment: 2012-2014 Overnight Leisure (%) • New Jersey N = 4,216 household count

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

TRIP CHARACTERISTICS

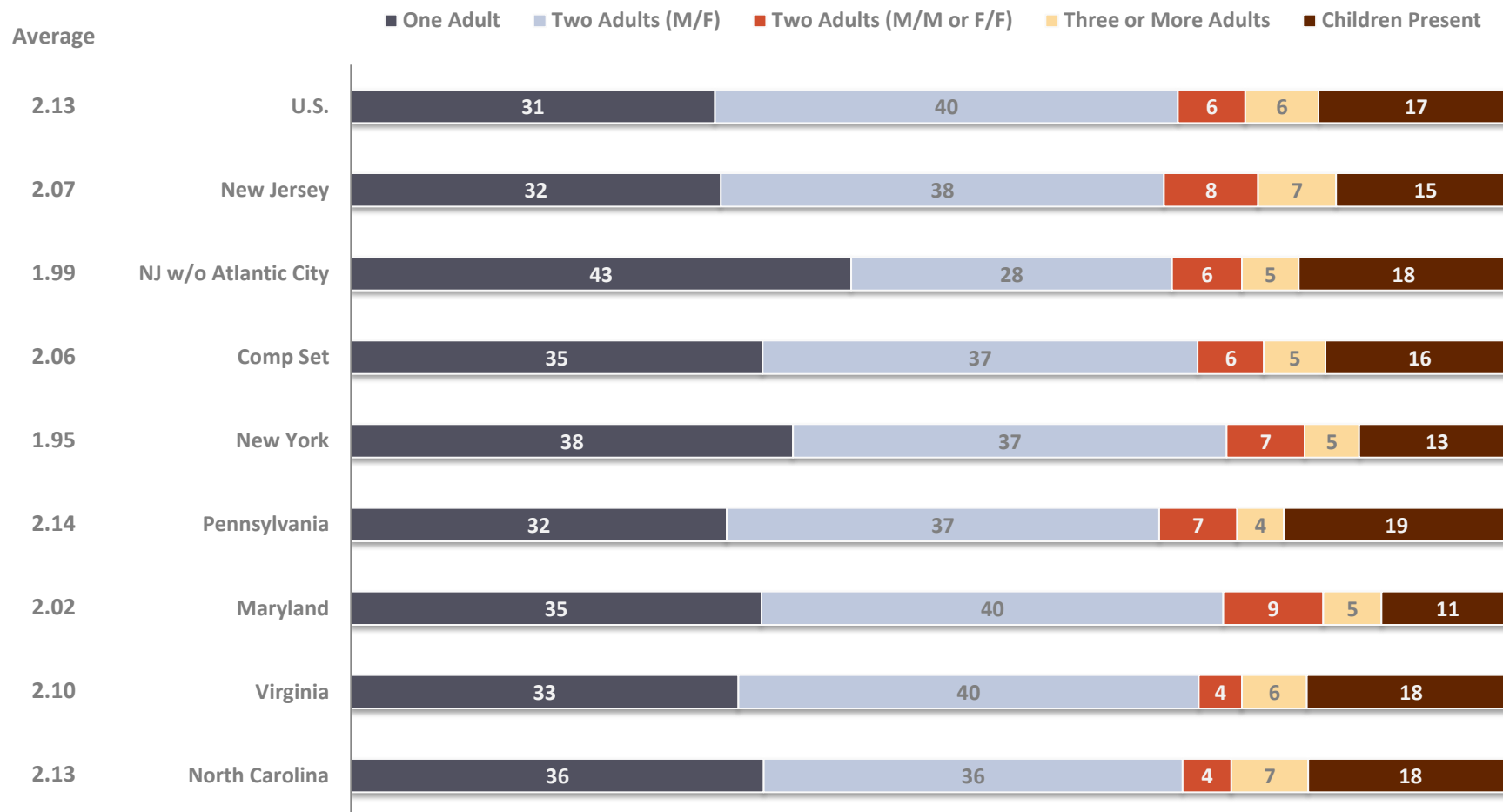


Chart 42 • Segment: 2014 Overnight Leisure Stays (%) • New Jersey N = 1,150 household count

GLOSSARY

Children Present

Is defined as one or more adults accompanied by one or more persons under age 18. The child does not necessarily have 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

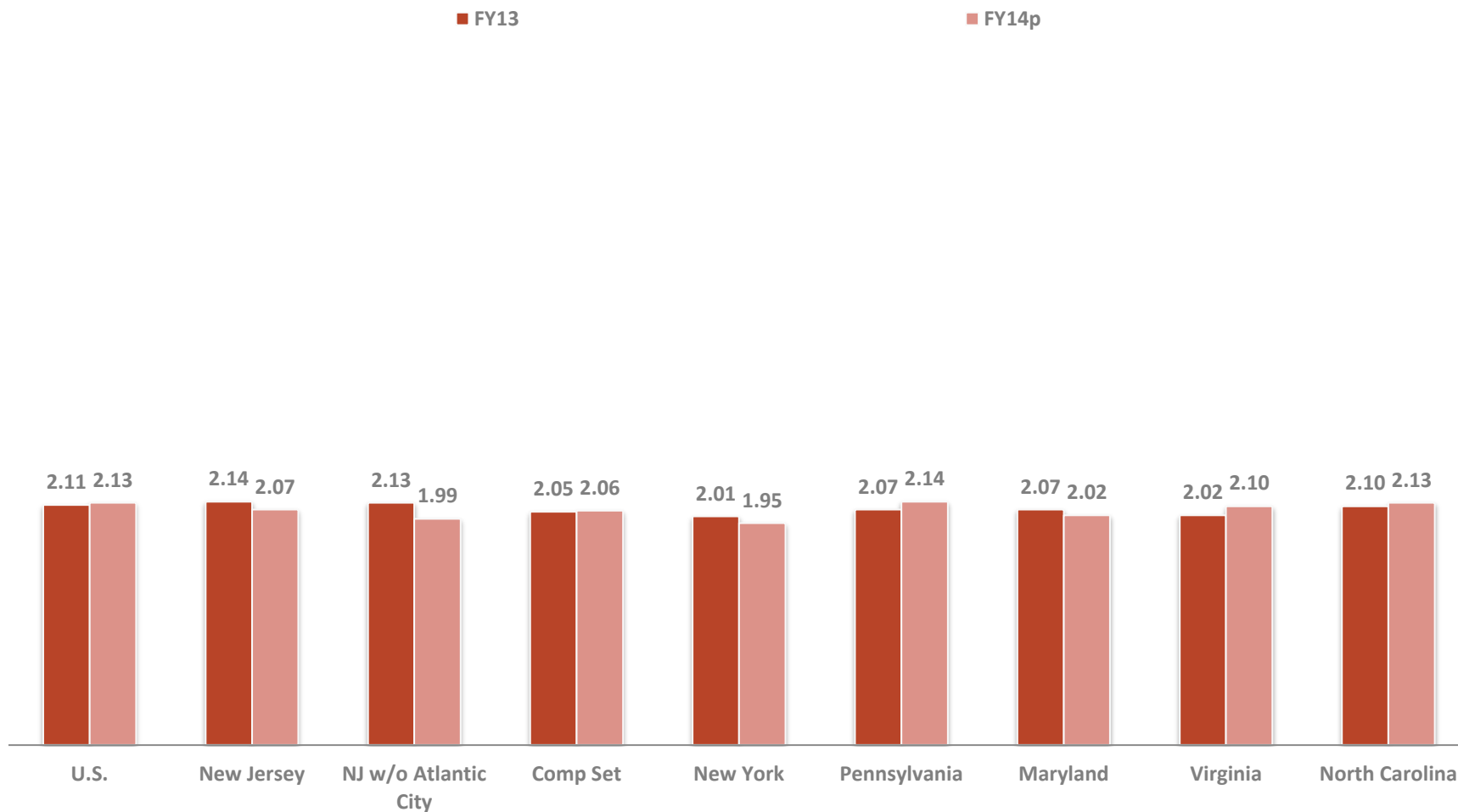


Chart 43 • Segment: 2013/2014 Overnight Leisure Stays • New Jersey N = 1,540/1,150 household count

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

TRIP CHARACTERISTICS

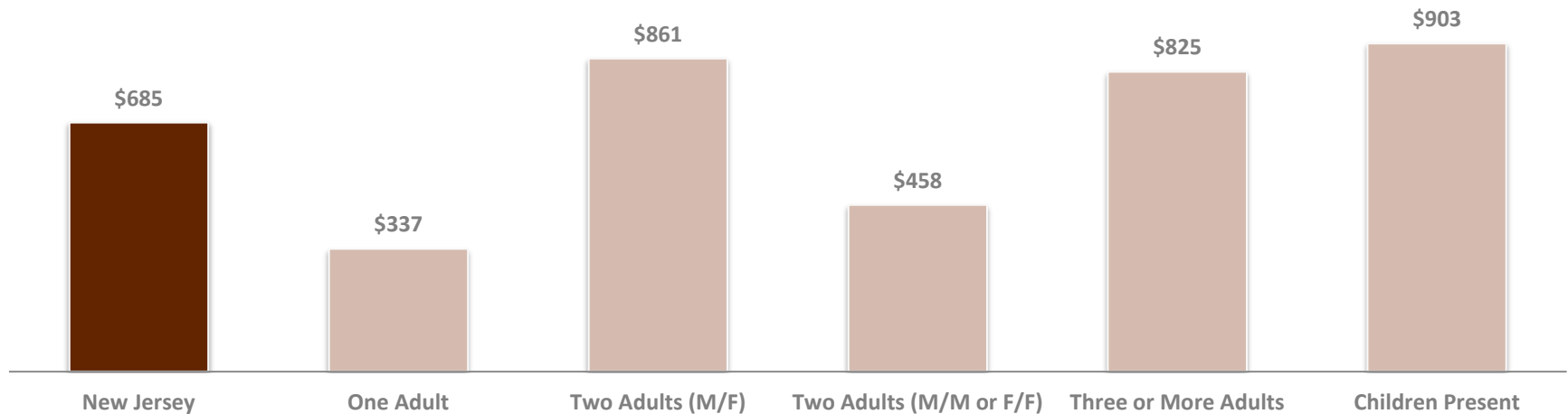


Chart 44 • Segment: 2012-2014 Overnight Leisure Stays (\$) • New Jersey N = 4,004 household count

New Jersey Travel Party Comparison

TRIP CHARACTERISTICS

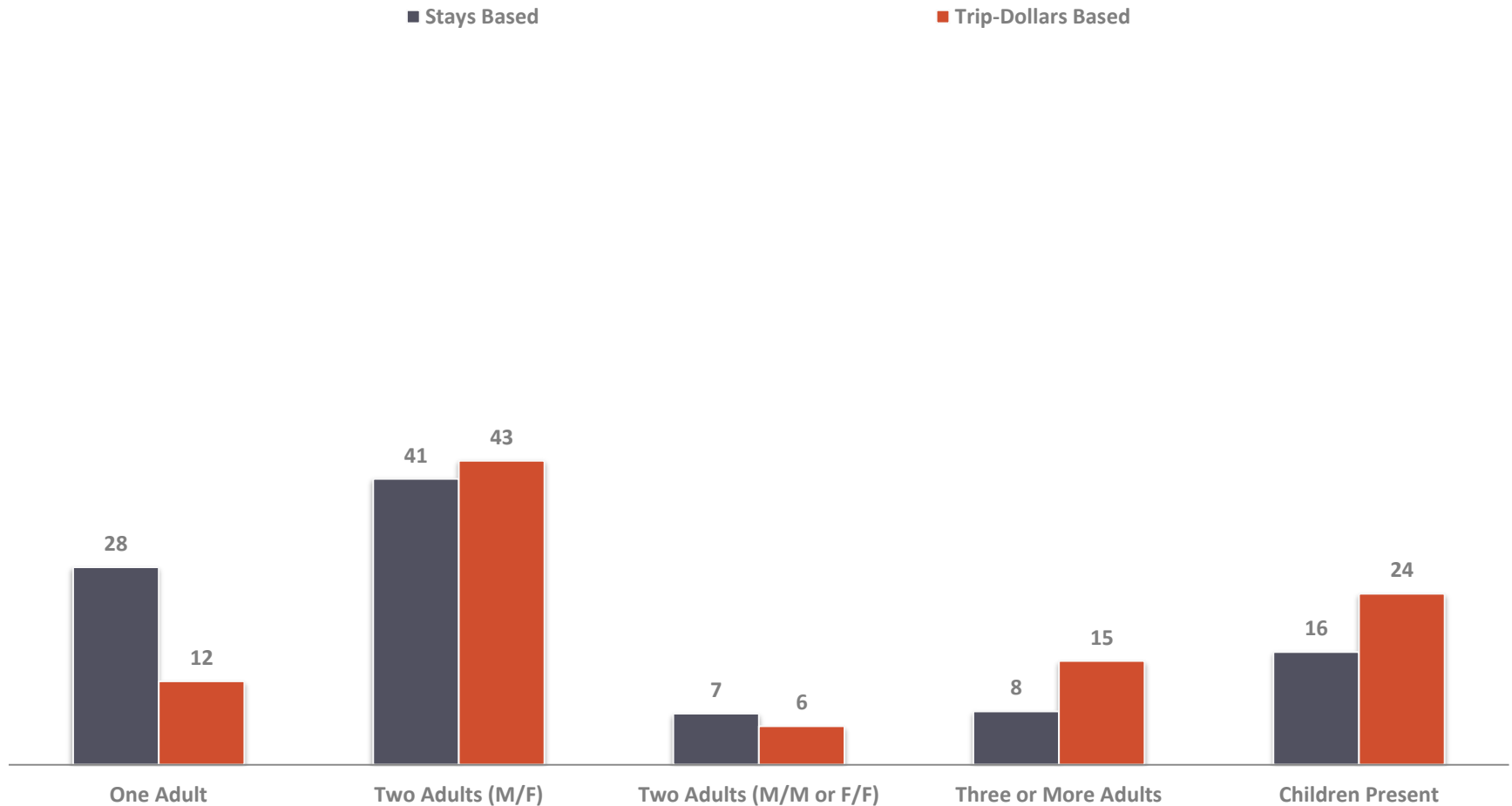


Chart 45 • Segment: 2012-2014 Overnight Leisure (%) • New Jersey N = 4,216 household count

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

TRIP CHARACTERISTICS

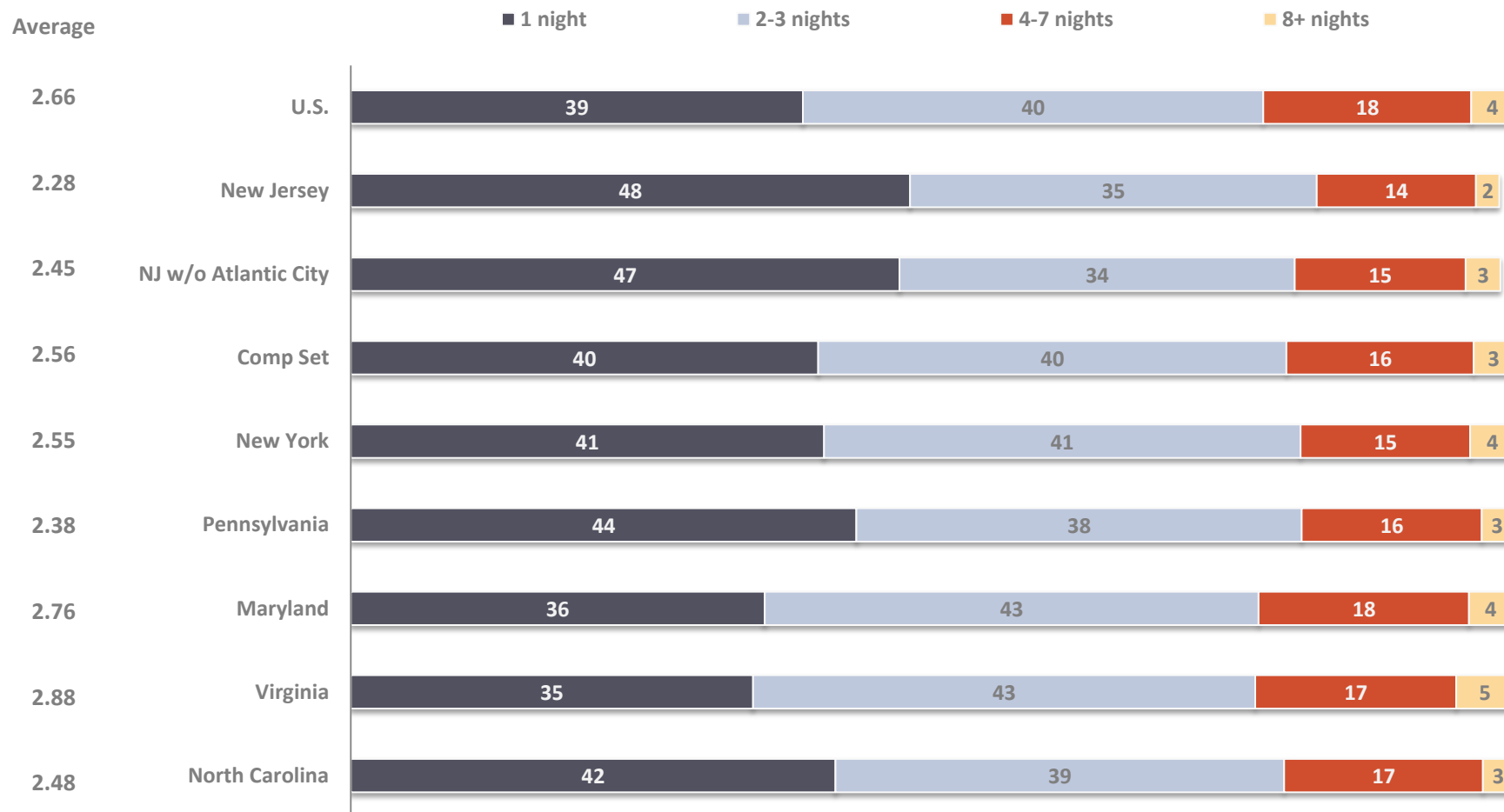


Chart 46 • Segment: 2014 Overnight Leisure Stays (%) • New Jersey N = 1,150 household count

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

TRIP CHARACTERISTICS

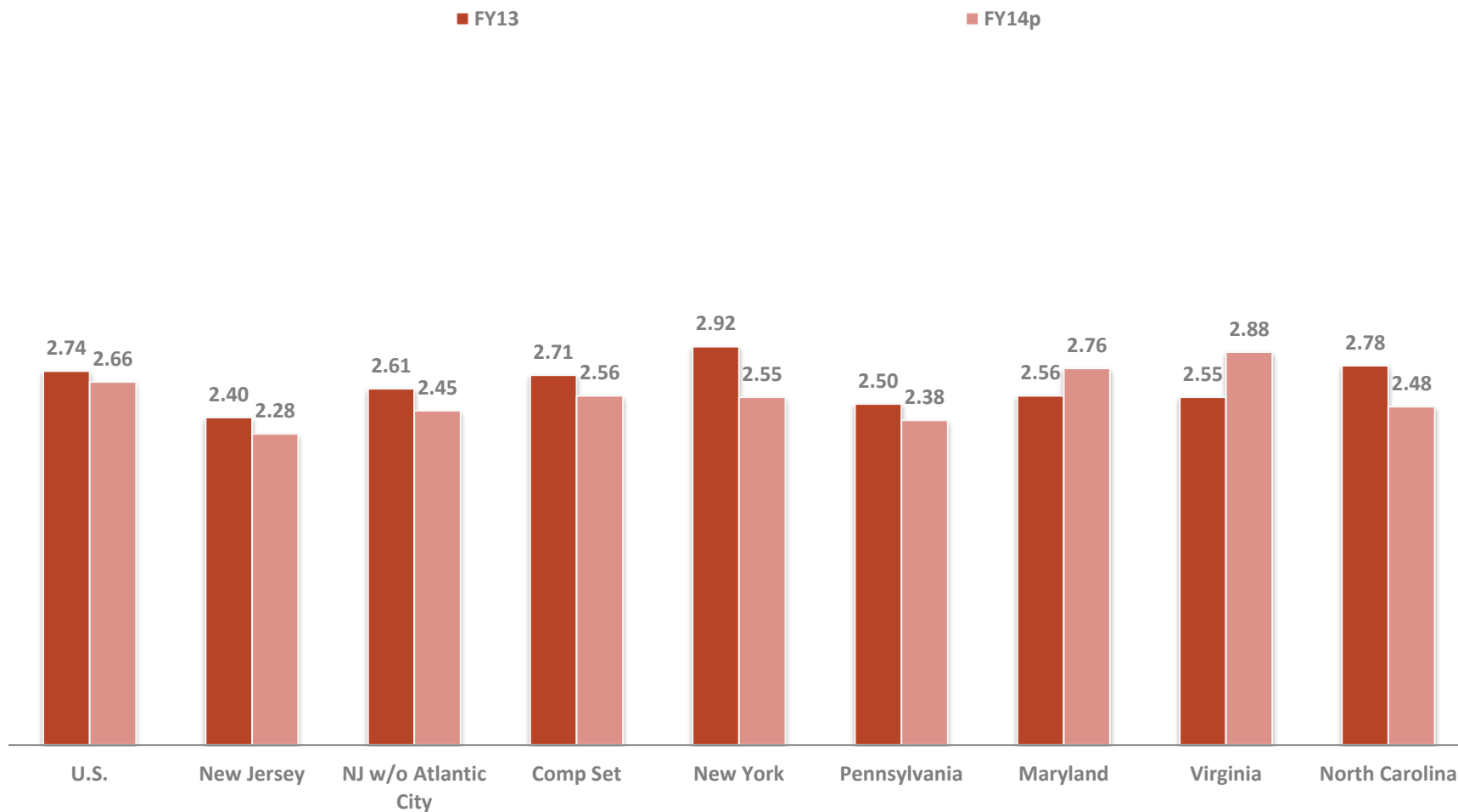


Chart 47 • Segment: 2013/2014 Overnight Leisure Stays • New Jersey N = 1,540/1,150 household count

New Jersey Avg. Party per Stay Spending by Stay Length

TRIP CHARACTERISTICS

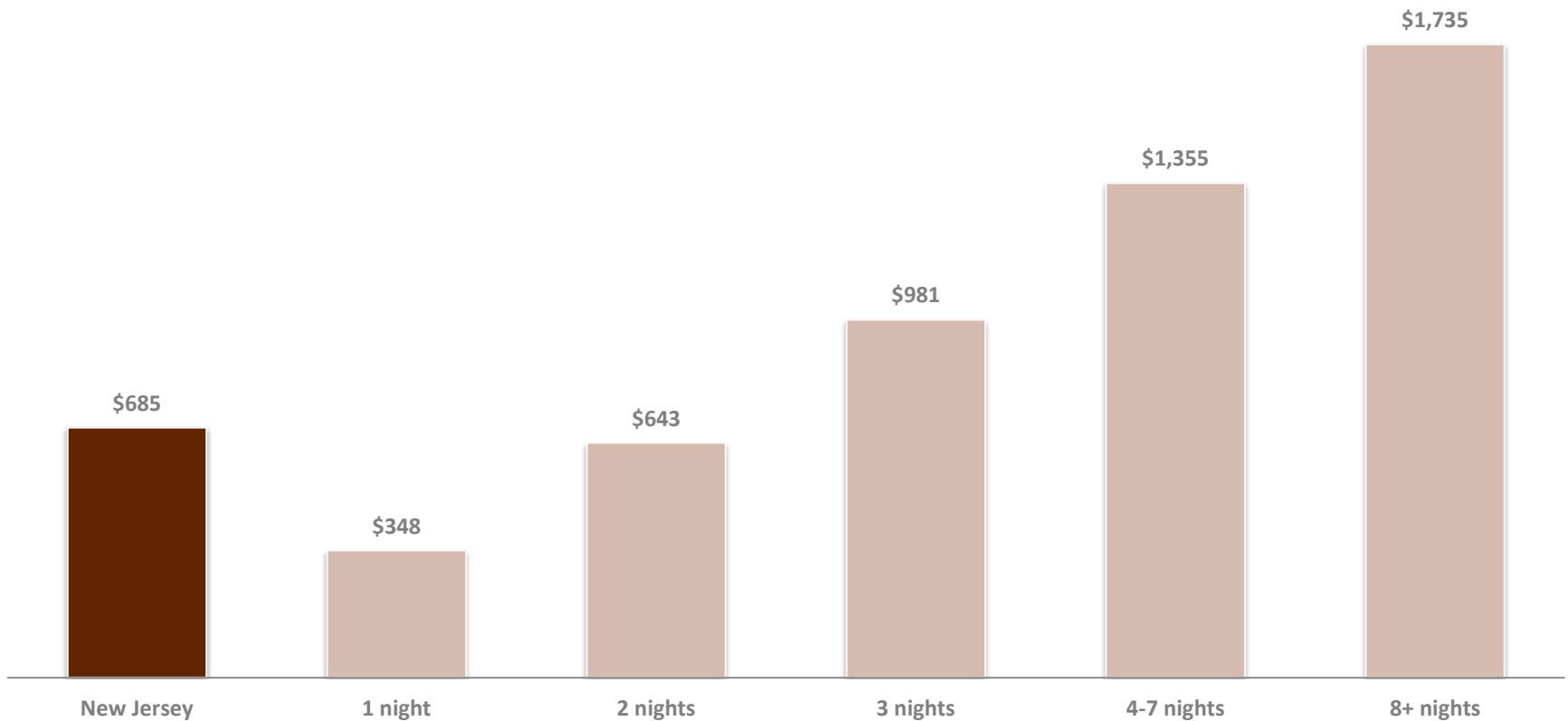


Chart 48 • Segment: 2012-2014 Overnight Leisure Stays (\$) • New Jersey N = 4,004 household count

New Jersey Stay Length Comparison

TRIP CHARACTERISTICS

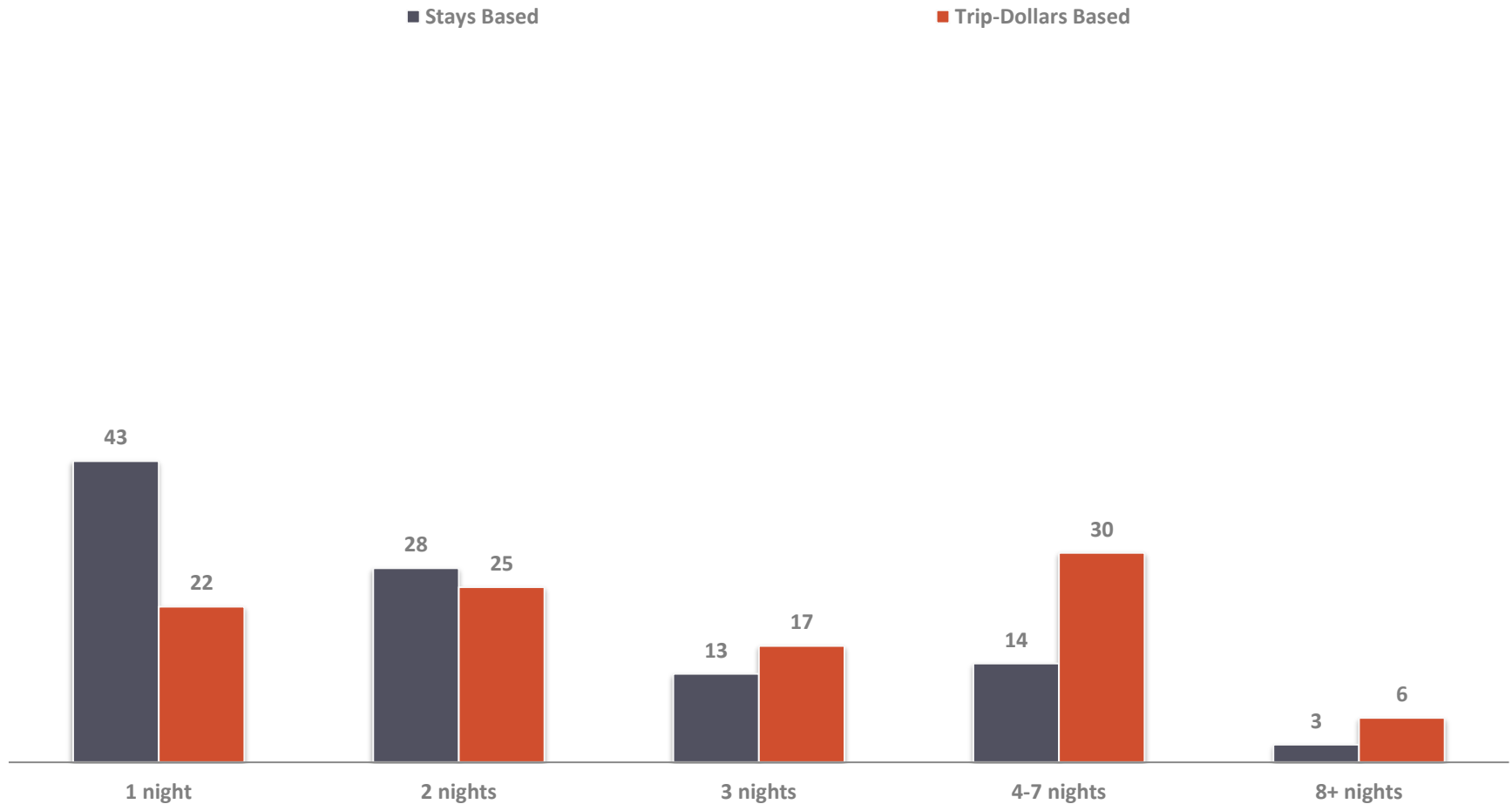


Chart 49 • Segment: 2012-2014 Overnight Leisure (%) • New Jersey N = 4,216 household count

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

TRIP CHARACTERISTICS

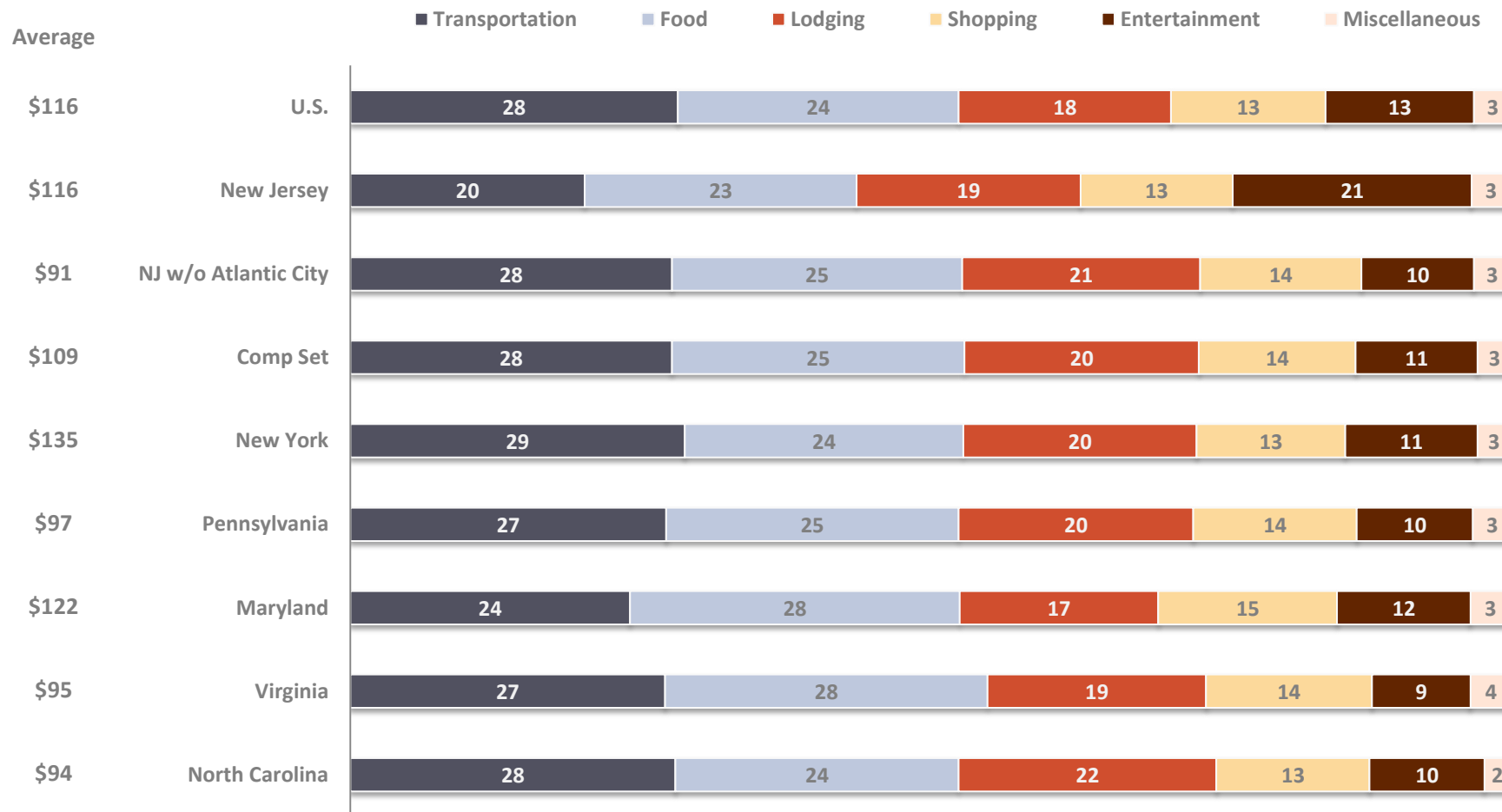


Chart 50 • Segment: 2014 Overnight Leisure Person-Days (%) • New Jersey N = 1,080 household count

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

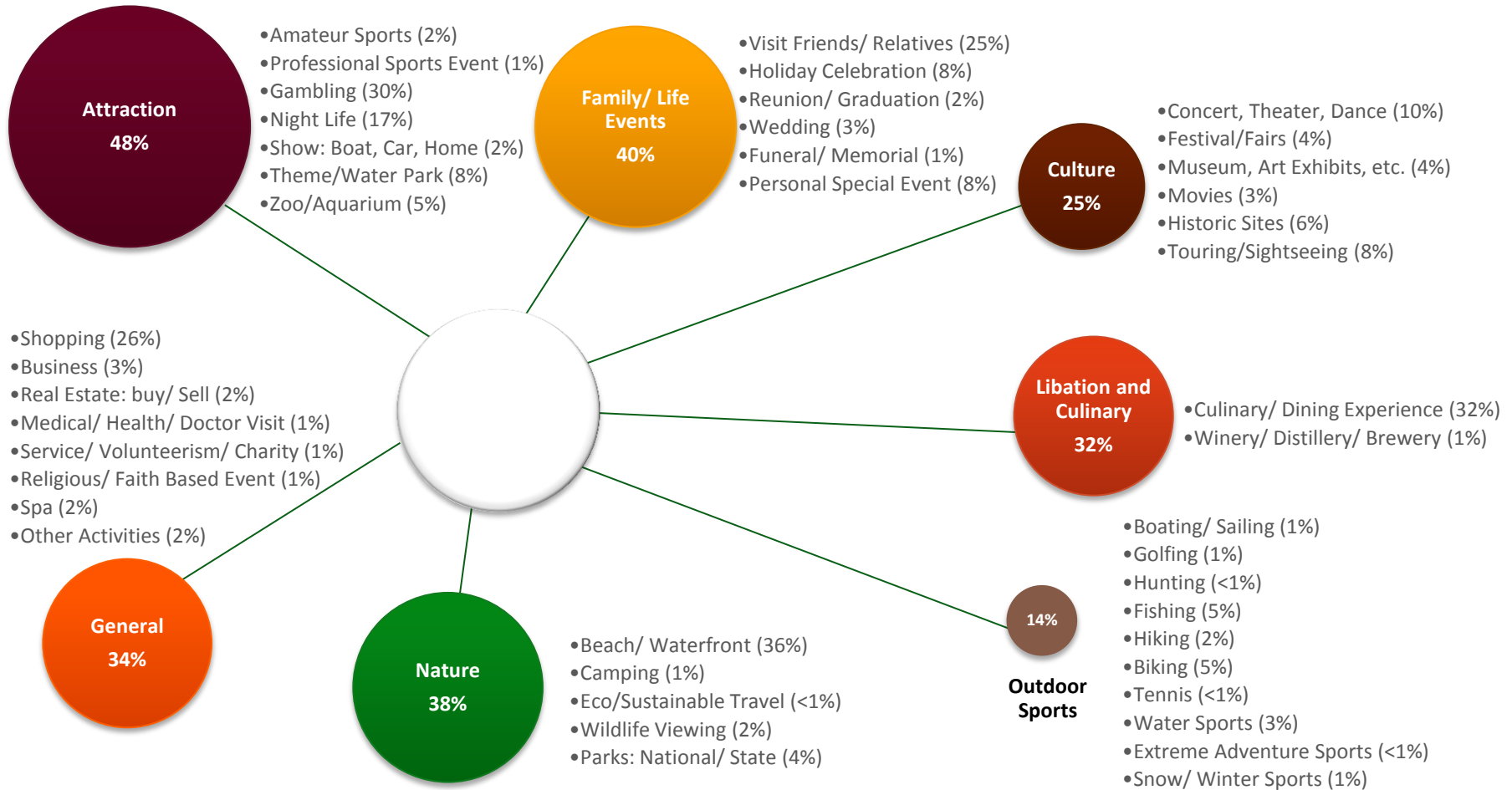


Chart 51 • Segment: 2014 Overnight Leisure Person-Stays (%) • New Jersey N = 1,150 household count

Top Activities at the Destination

ACTIVITY PARTICIPATION

	U.S.	New Jersey	NJ w/o Atlantic City	New York	Pennsylvania	Maryland	Virginia	North Carolina
Beach/Waterfront	19%	36%	30%	10%	6%	25%	16%	16%
Culinary/Dining Experience	29%	32%	26%	33%	29%	33%	29%	27%
Gambling (slots, cards, horses, etc.)	9%	30%	4%	6%	5%	6%	1%	4%
Shopping	26%	26%	22%	30%	22%	28%	26%	21%
Visit Friends/Relatives (general visit)	32%	25%	34%	37%	34%	38%	38%	32%
Nightlife (bar, nightclub, etc.)	11%	17%	10%	12%	7%	17%	8%	8%
Concerts/Theatre/Dance etc.	8%	10%	6%	14%	9%	6%	5%	5%
Personal Special Event	9%	8%	7%	9%	11%	10%	9%	9%
Holiday Celebration (Thanksgiv., July 4th etc.)	7%	8%	11%	7%	8%	14%	5%	9%
Touring/Sightseeing	15%	8%	8%	20%	12%	17%	13%	11%
Theme/Amusement/Water Parks	7%	8%	9%	4%	8%	5%	4%	2%
Historic Sites	12%	6%	8%	16%	12%	13%	20%	11%
Zoo/Aquarium	4%	5%	6%	3%	3%	4%	2%	3%
Biking	3%	5%	7%	3%	4%	4%	4%	4%
Fishing	4%	5%	5%	3%	4%	7%	4%	4%
Museums, Art Exhibits etc.	10%	4%	6%	16%	9%	9%	12%	8%
Parks (national/state, etc.)	13%	4%	6%	18%	11%	11%	11%	11%
Festivals/Fairs (state, craft, etc.)	6%	4%	5%	5%	6%	9%	6%	4%
Movies	7%	3%	4%	7%	5%	8%	8%	5%
Business	1%	3%	4%	1%	1%	1%	1%	2%
Water Sports	3%	3%	3%	2%	2%	4%	1%	4%
Wedding	3%	3%	4%	3%	4%	4%	3%	4%

Chart 52 • Segment: 2014 Overnight Leisure Stays (%) • New Jersey N = 1,150 household count

Top Activities at the Destination

ACTIVITY PARTICIPATION

	U.S.	New Jersey	NJ w/o Atlantic City	New York	Pennsylvania	Maryland	Virginia	North Carolina
Amateur Sports (attend/participate)	4%	2%	3%	3%	4%	3%	5%	2%
Reunion/Graduation	4%	2%	3%	5%	4%	2%	3%	4%
Spa	2%	2%	1%	1%	1%	1%	1%	1%
Wildlife Viewing (birds, whales, etc.)	6%	2%	3%	4%	4%	3%	3%	6%
Show: Boat, Car, Home	2%	2%	2%	2%	2%	3%	1%	1%
Hiking	7%	2%	2%	7%	6%	5%	7%	8%
Real Estate (buy/sell)	1%	2%	3%	1%	<1%	2%	2%	1%
Boating/Sailing	3%	1%	2%	4%	3%	4%	1%	2%
Medical/Health/Doctor Visit	2%	1%	2%	2%	3%	1%	1%	3%
Professional Sports Event	3%	1%	2%	3%	4%	7%	1%	2%
Service/Volunteerism/Charity	1%	1%	2%	1%	1%	1%	<1%	2%
Snow/Winter Sports	1%	1%	2%	1%	3%	1%	<1%	3%
Funeral/Memorial	2%	1%	1%	1%	2%	1%	4%	1%
Winery/Distillery/Brewery Tours	3%	1%	1%	3%	1%	2%	4%	3%
Camping	5%	1%	1%	4%	8%	3%	3%	3%
Golfing	3%	1%	1%	1%	2%	2%	3%	3%
Religious/Faith Based Conference	2%	1%	1%	1%	2%	1%	1%	3%
Hunting	<1%	<1%	<1%	<1%	1%	<1%	<1%	<1%
Tennis	1%	<1%	<1%	1%	1%	1%	1%	<1%
Eco/Sustainable Travel	1%	<1%	<1%	<1%	1%	<1%	<1%	<1%
Extreme/Adventure Sports	1%	<1%	<1%	<1%	<1%	<1%	<1%	<1%
Other	2%	2%	2%	2%	3%	1%	2%	3%

Chart 53 • Segment: 2014 Overnight Leisure Stays (%) • New Jersey N = 1,150 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.

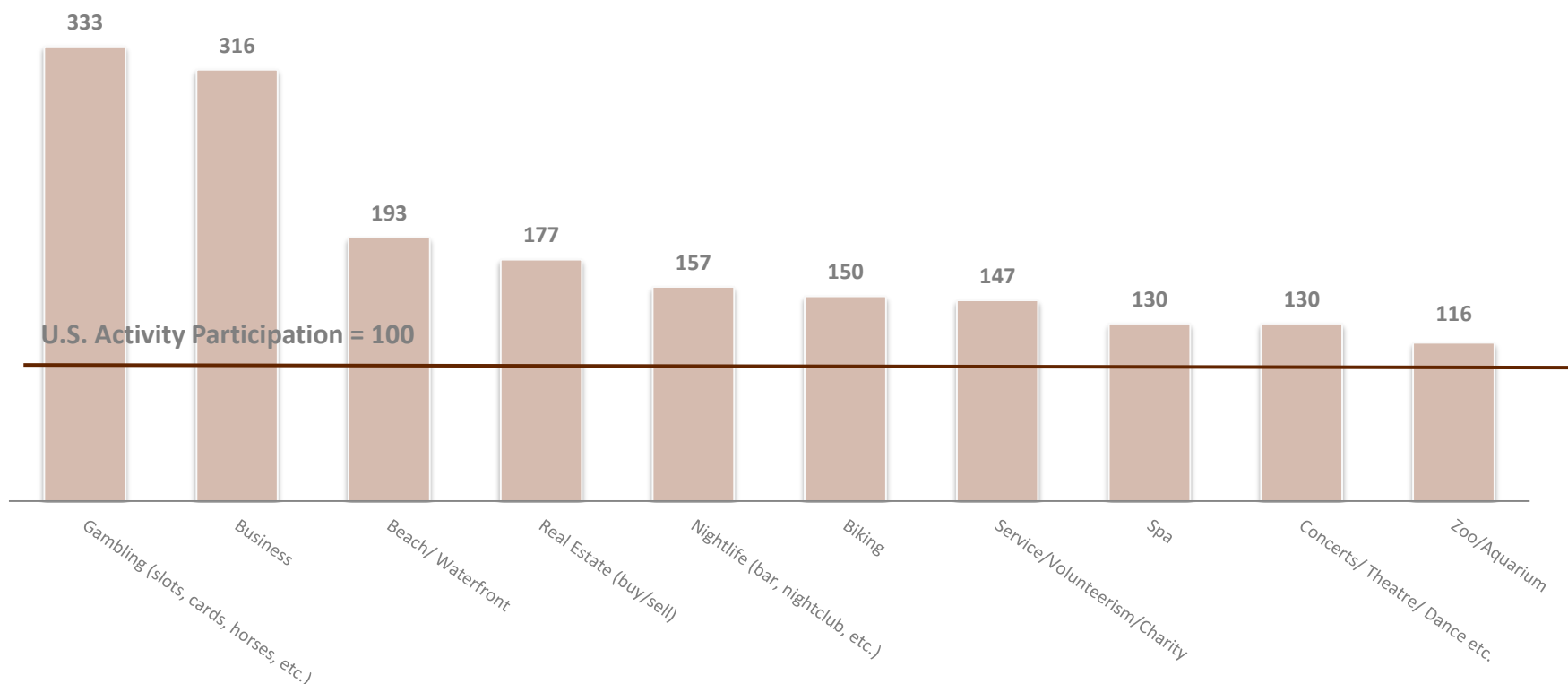


Chart 54 • Segment: 2014 Overnight Leisure Person-Stays • New Jersey N = 1,150 household count

New Jersey Activity Index (cont.)

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.

U.S. Activity Participation = 100

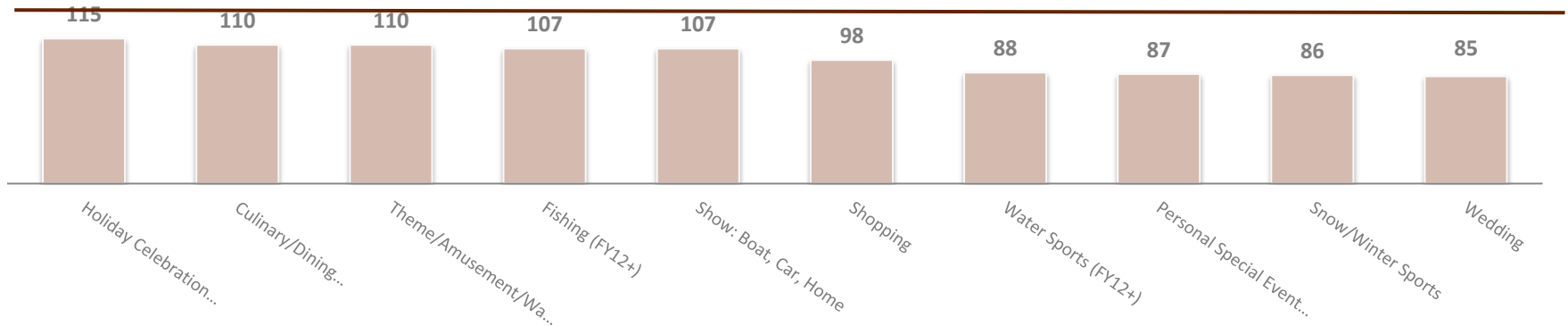


Chart 54 • Segment: 2014 Overnight Leisure Person-Stays • New Jersey N = 1,150 household count

New Jersey Activity Index (cont.)

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.

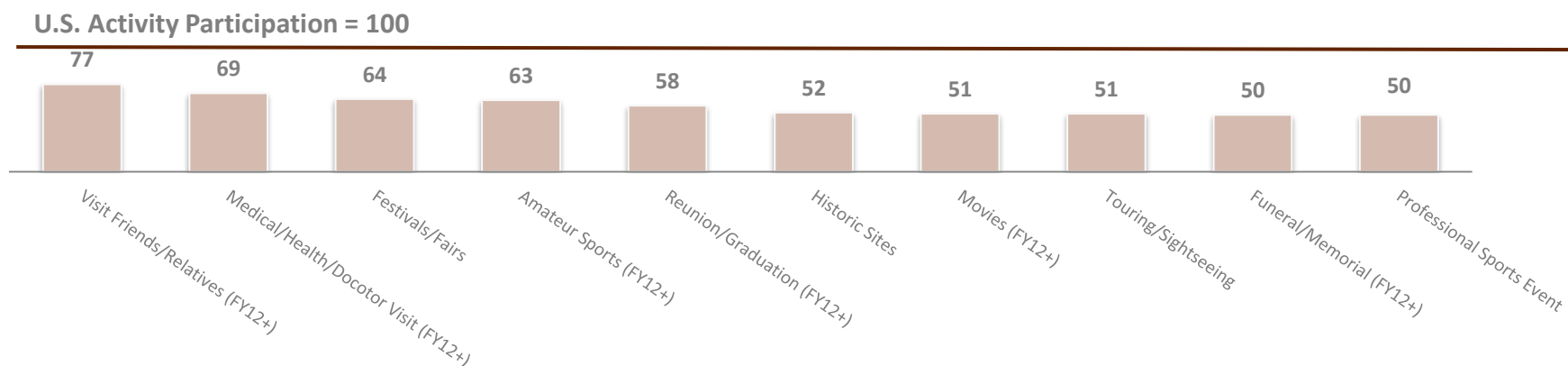


Chart 54 • Segment: 2014 Overnight Leisure Person-Stays • New Jersey N = 1,150 household count

New Jersey Activity Index (cont.)

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.

U.S. Activity Participation = 100

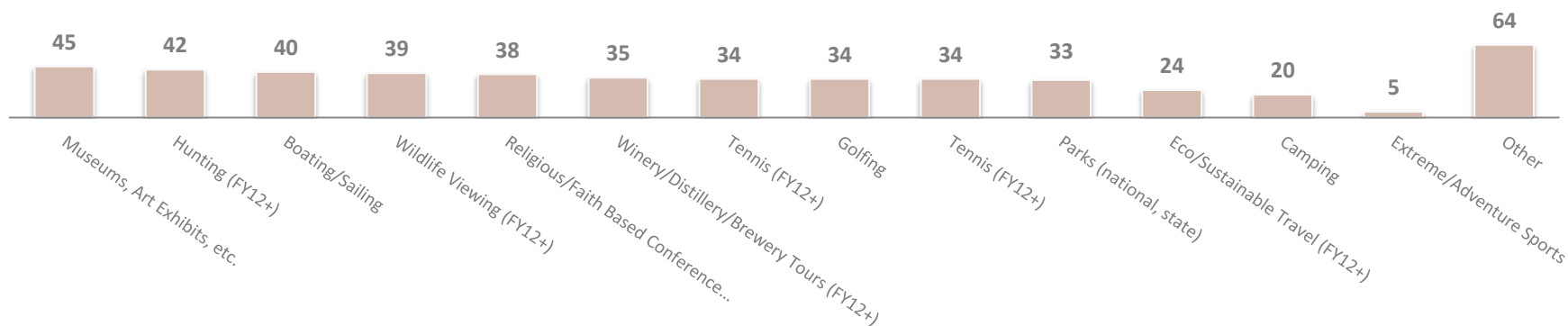


Chart 54 • Segment: 2014 Overnight Leisure Person-Stays • New Jersey N = 1,150 household count

New Jersey Avg. Party per Stay Spending by Activities

ACTIVITY PARTICIPATION

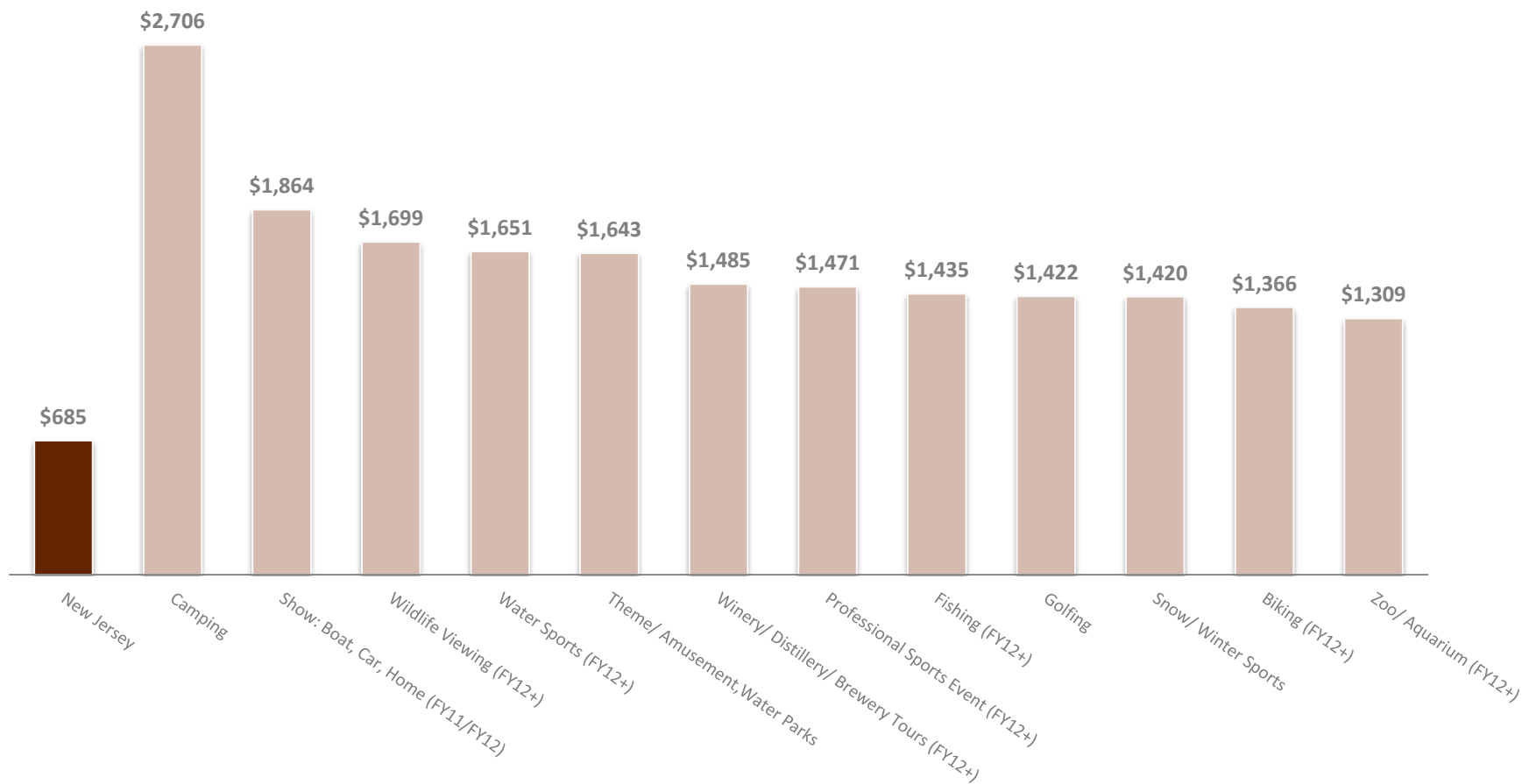


Chart 55 • Segment: 2012-2014 Overnight Leisure Stays (\$) • New Jersey N = 4,004 household count

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

ACTIVITY PARTICIPATION

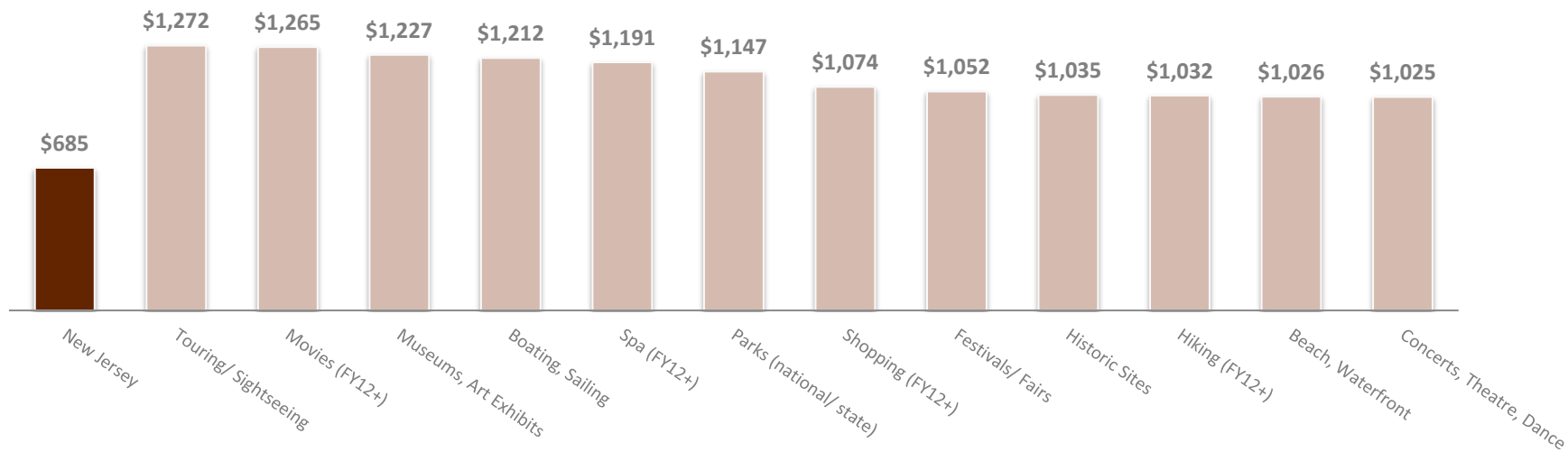


Chart 56 • Segment: 2012-20143 Overnight Leisure Stays (\$) • New Jersey N = 4,004 household count

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

ACTIVITY PARTICIPATION

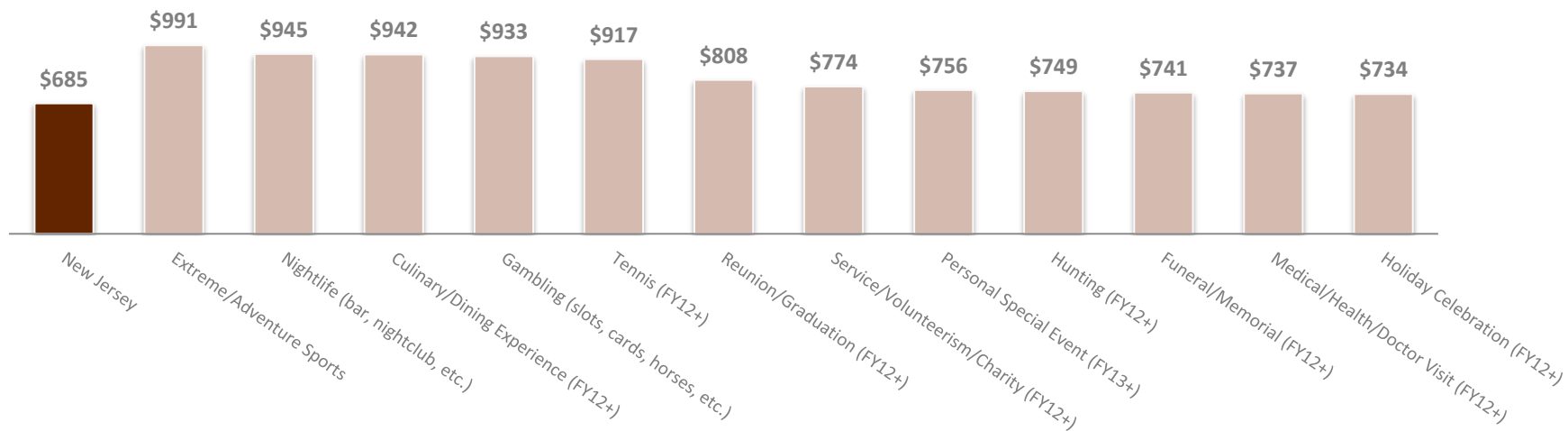


Chart 57 • Segment: 2012-2004 Overnight Leisure Stays (\$) • New Jersey N = 4,004 household count

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

ACTIVITY PARTICIPATION

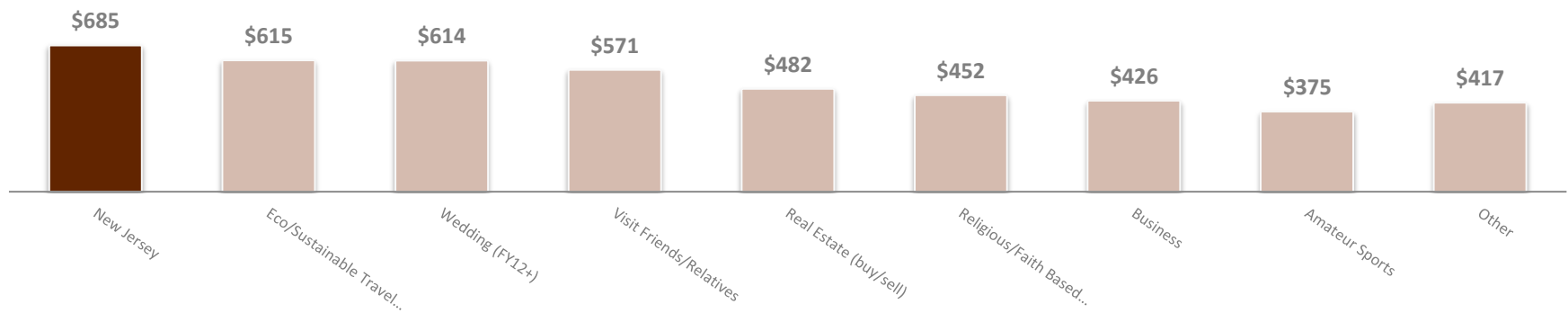


Chart 57 • Segment: 2012-2004 Overnight Leisure Stays (\$) • New Jersey N = 4,004 household count

New Jersey Activity Comparison

ACTIVITY PARTICIPATION

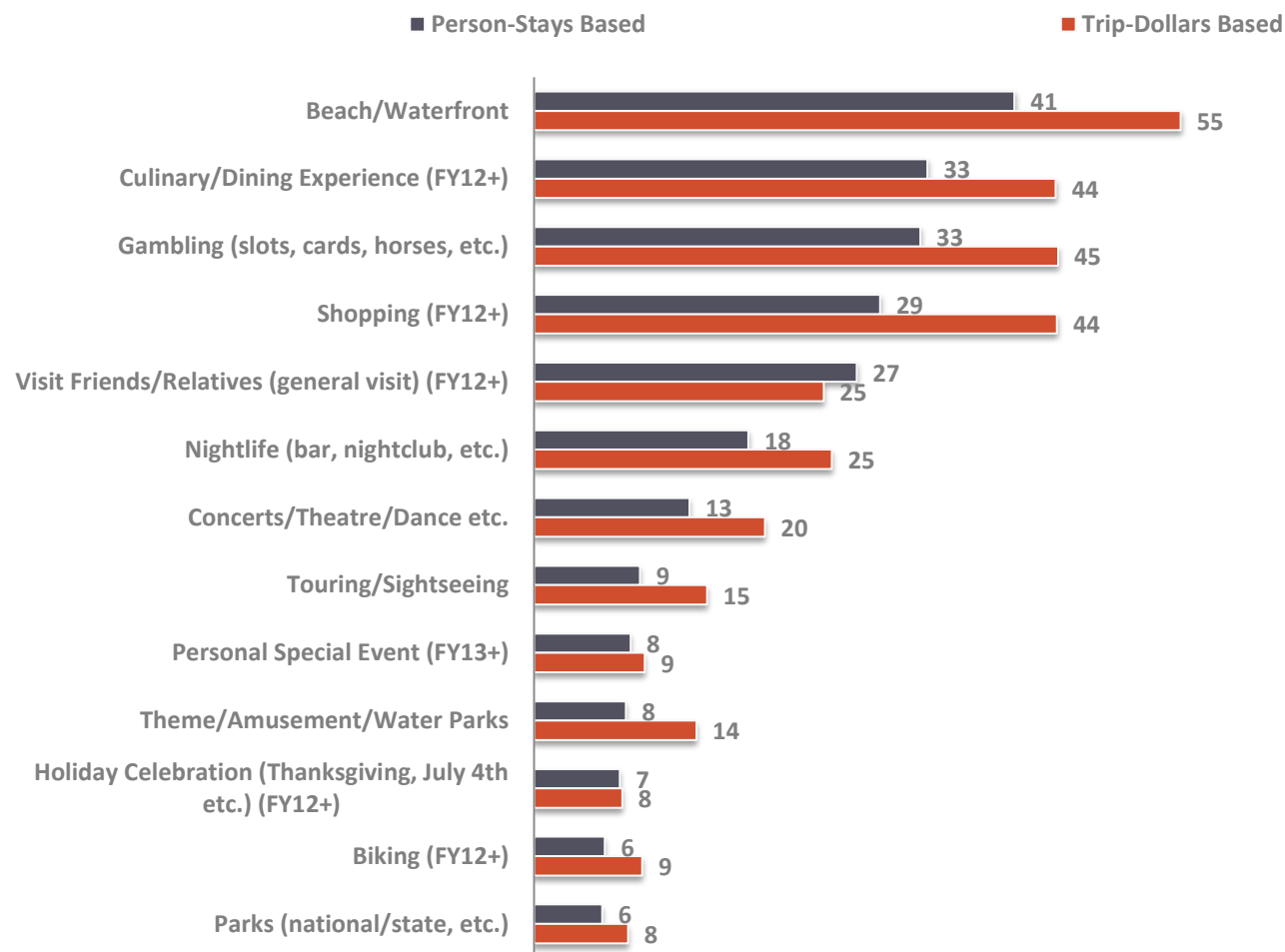


Chart 58 • Segment: 2012-2014 Overnight Leisure (%) • New Jersey N = 4,216 household count

New Jersey Activity Comparison (cont.)

ACTIVITY PARTICIPATION

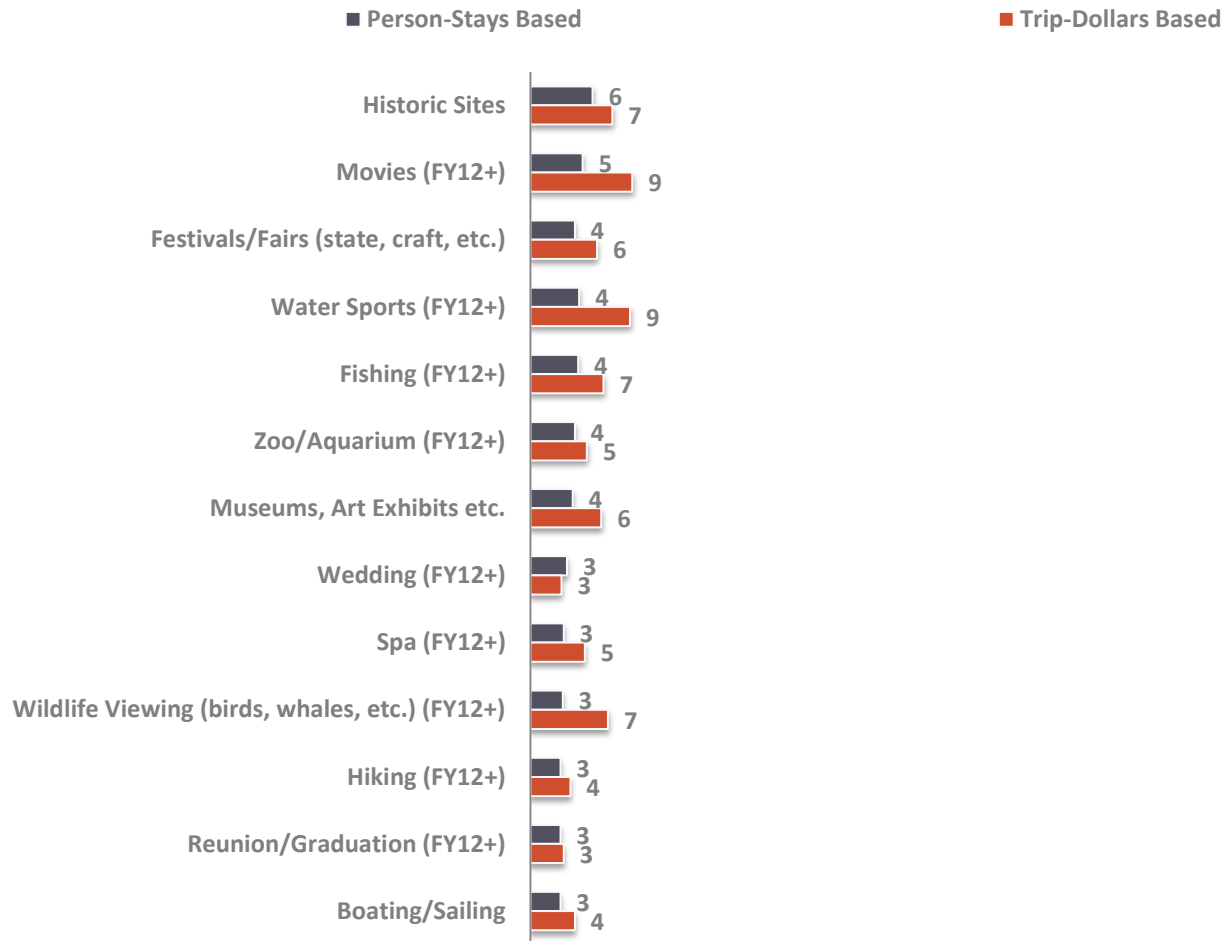


Chart 59 • Segment: 2012-2014 Overnight Leisure (%) • New Jersey N = 4,216 household count

New Jersey Activity Comparison (cont.)

ACTIVITY PARTICIPATION

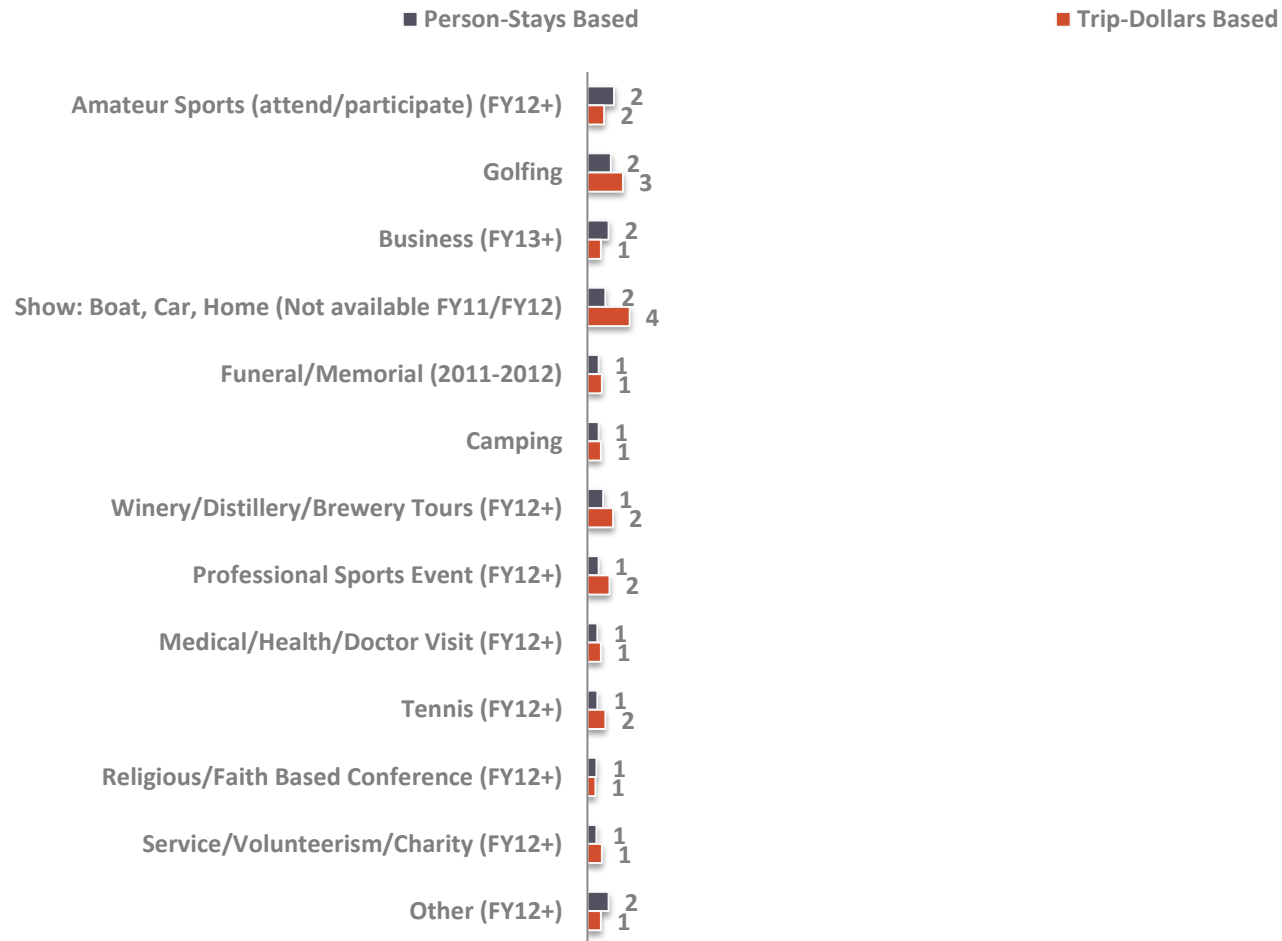


Chart 60 • Segment: 2012-2014 Overnight Leisure (%) • New Jersey N = 4,004 household count

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

ACCOMMODATION

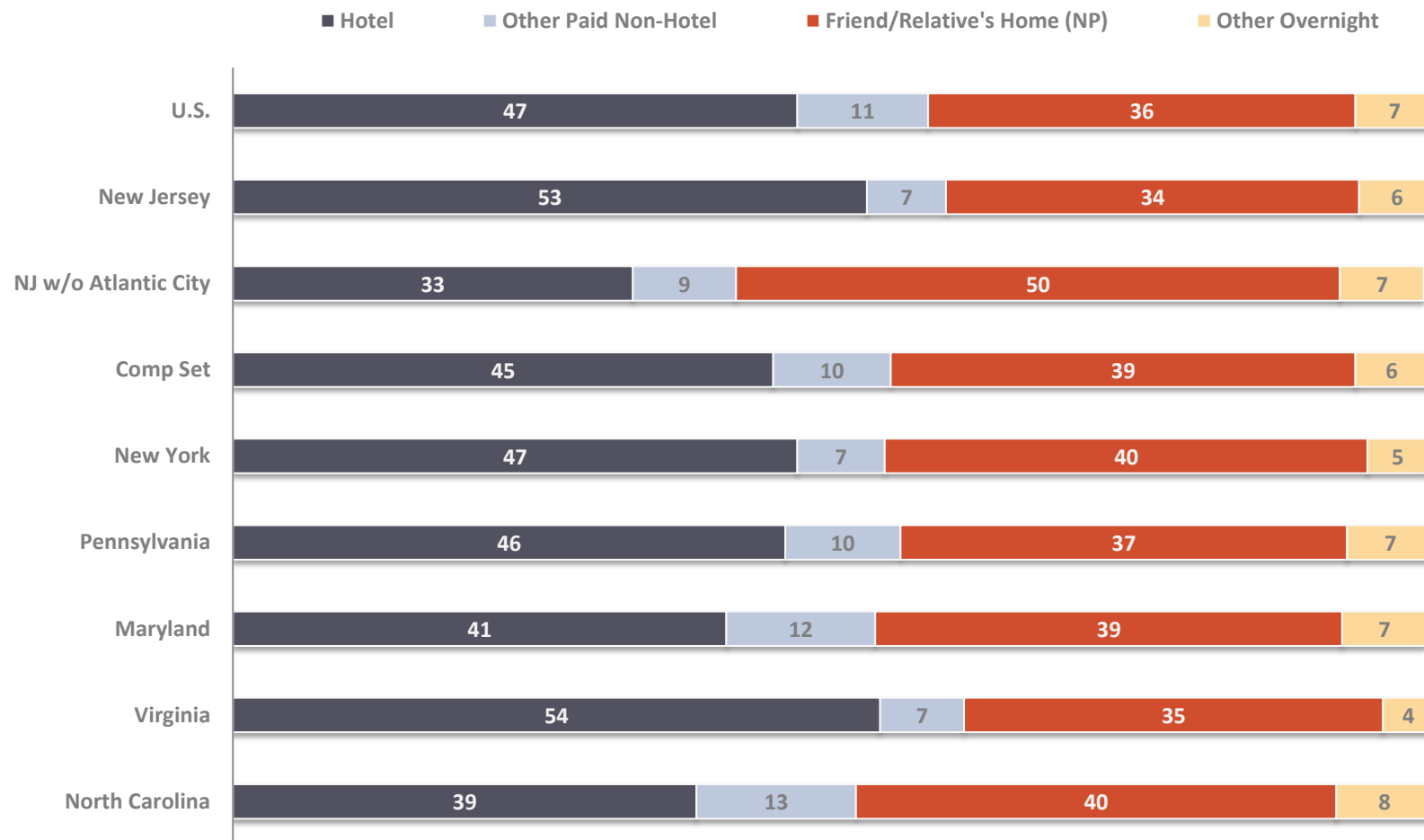


Chart 61 • Segment: 2014 Overnight Leisure Person-Stays (%) • New Jersey N = 1,150 household count

New Jersey Avg. Party per Stay Spending by Accommodation Type

ACCOMMODATION

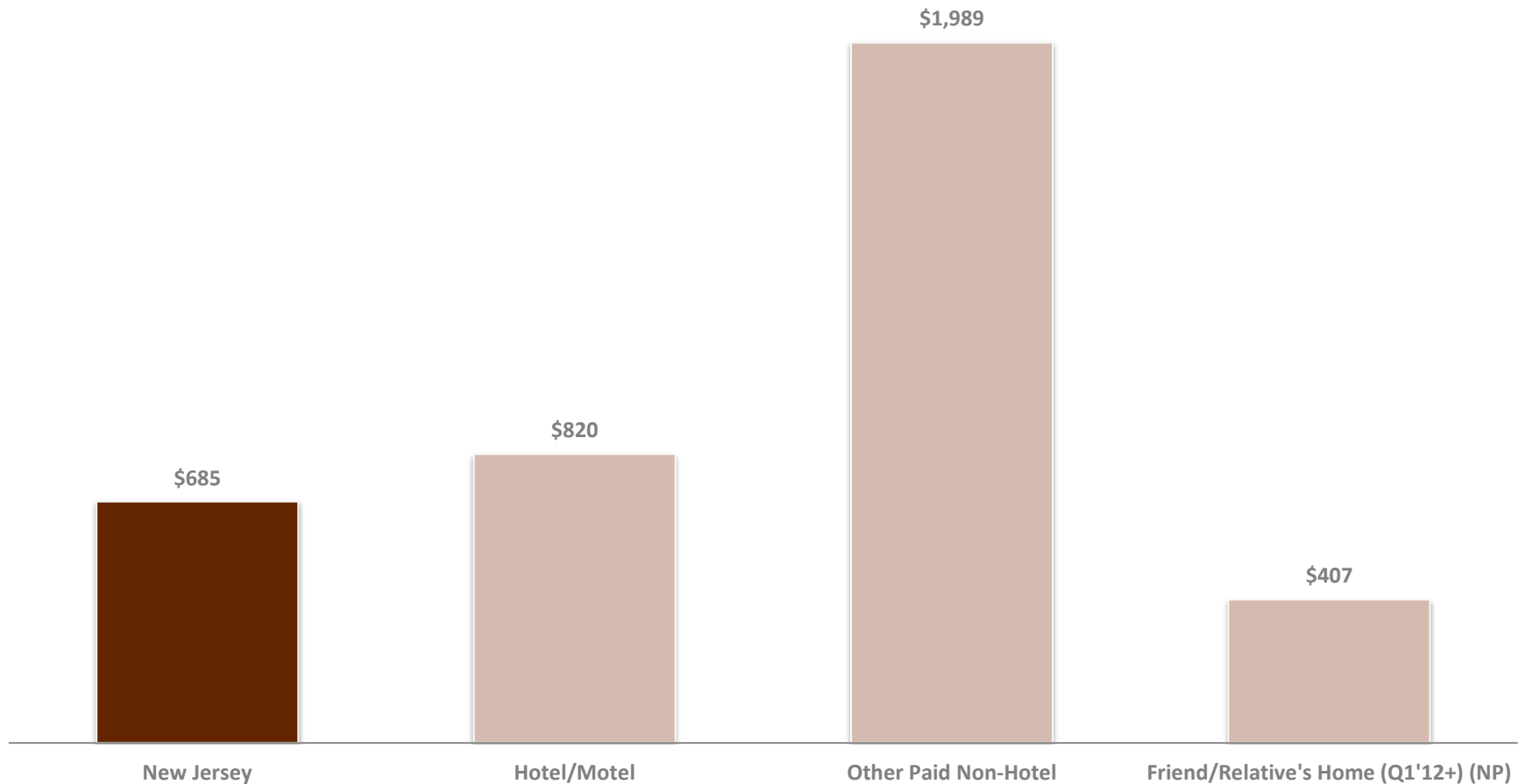


Chart 62 • Segment: 2012-2014 Overnight Leisure Stays (\$) • New Jersey N = 4,004 household count

New Jersey Accommodation Type Comparison

ACCOMMODATION

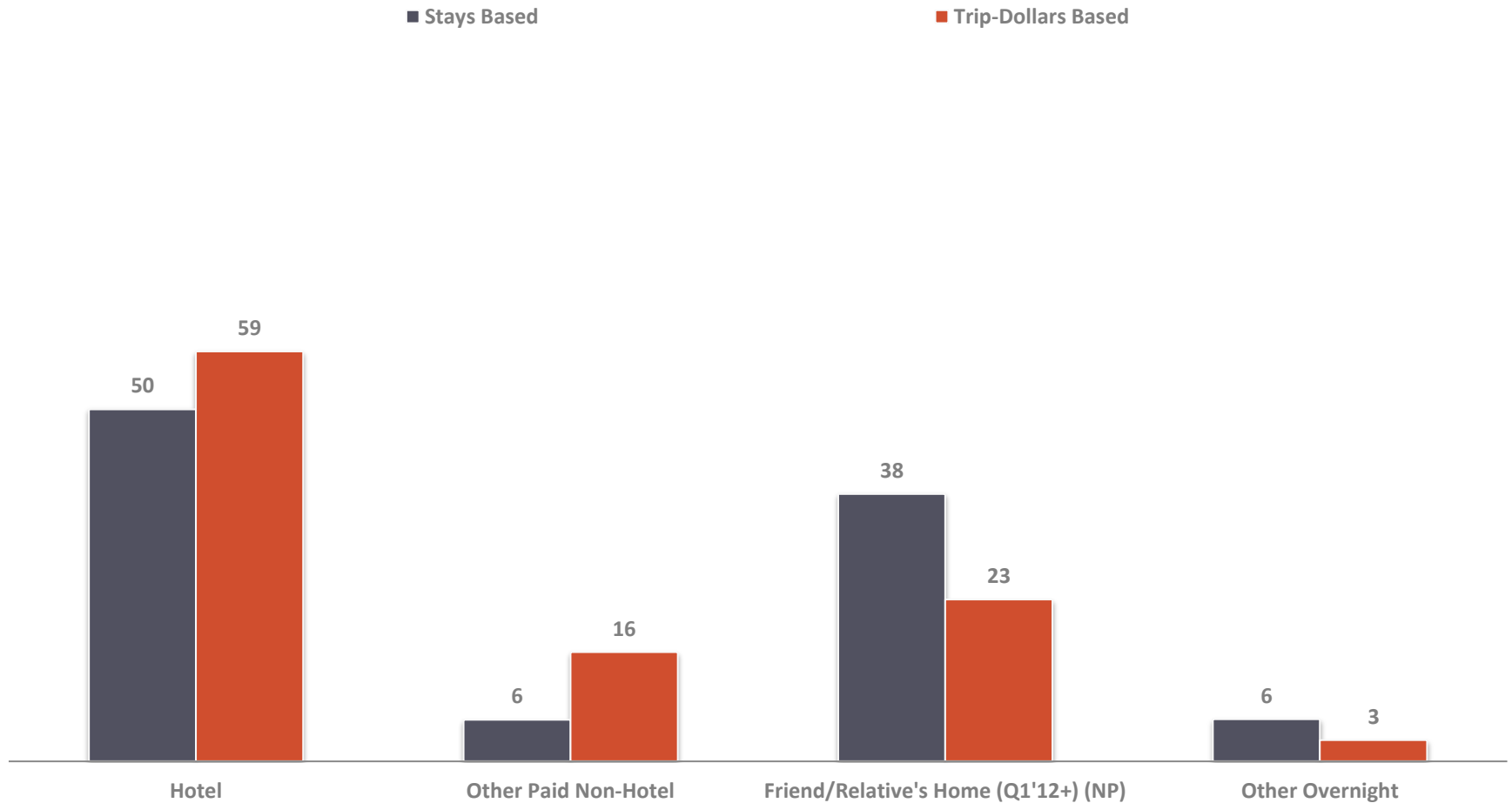


Chart 63 • Segment: 2012-2014 Overnight Leisure (\$) • New Jersey N = 4,216 household count

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.	34,843	0.1%	0.2%	0.2%	0.3%	0.4%
New Jersey	1,150	0.5%	0.9%	1.3%	1.9%	2.4%
NJ w/o Atlantic City	766	0.6%	1.1%	1.5%	2.2%	2.9%
Comp Set	7,032	0.2%	0.4%	0.5%	0.7%	1.0%
New York	2,507	0.3%	0.6%	0.9%	1.2%	1.6%
Pennsylvania	1,812	0.4%	0.7%	1.0%	1.5%	1.9%
Maryland	837	0.6%	1.0%	1.5%	2.2%	2.8%
Virginia	1,164	0.5%	0.9%	1.3%	1.8%	2.4%
North Carolina	1,439	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 34,843, 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)	34,843	45,168	-4.11	(+/-) 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 (-4.11) 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.