



D.K. Shifflet & Associates Ltd.

Excellence in Travel Intelligence®

2015 NEW JERSEY OVERNIGHT LEISURE VISITOR PROFILE

Editorial

Summary

Charts & Graphs

Fiscal Year 2015 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 2015. 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 2015 New Jersey hosted a total...
93.7 Million visitors spending...
\$20.0 Billion dollars*

offerings and recent troubles 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 2015 New Jersey Overnight Leisure Visitor Profile is based on a sample of 1,056 traveling households. Data are based on a fiscal year comprised of fourth quarter 2014 through third quarter 2015. DKSA finalizes, and makes all quarterly data adjustments, after data collection for the fourth quarter of the year. Therefore fiscal year 2015 data is considered 'preliminary' meaning that it is subject to year end 2015 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 New Jersey's natural and financial disasters, the State 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 2015, year over year growth in visitation increased slightly from 2014. Growth in spending also recorded its highest year over year increase since the slow down that began in 2011.

While growth in overall travel as well as business travel had

modest increases in 2015, growth in leisure travel had the highest year over year growth. This can be attributed to a much larger increase in overnight leisure trips during 2015.

In 2015, New Jersey experienced slower growth in visitation and higher growth in spending than the average U.S. destination. Thus, not only did more visitors travel to New Jersey in 2015, those who visited spent more in 2015 than they did in 2014, and their increases in spending were greater than their counterpart's while visiting the average U.S. destination.

Since growth in visitation fell below that of the average U.S. destination, New Jersey lost some market share in 2015. This was shared pretty equally through out the State with Atlantic City's growth in visitation only slightly lower than the State as a whole.

New Jersey Fiscal Year 2015 Highlights:

- Record high visitation and spending in 2015
- Continued modest growth in Overnight Leisure Visitor Volume and Spending
- Non-Atlantic City portions of the state account for the largest share of Total and Overnight Leisure spending growth.
- Overall visitor growth is shared evenly between Atlantic City and the rest of New Jersey.
- New Jersey maintains third position in market share among competitive states.
- Pennsylvania continues decline in market share maintaining the #4 position among the competition.
- Skylands region shows largest growth in share of visitation; Greater Atlantic City region lost share.
- Visitor demographics changing as visitation to non-Atlantic City regions grows
- Activity participation remains largely the same, but Gambling drops in activity rankings for non-Atlantic City regions.

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 2015 in New Jersey.

Timeframe: Fiscal Year 2015 (Q4 2014 – Q3 2015)

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 in 2015 hosted 30% of visitors to the State, 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. However, if travel to the rest of the state continues to grow year over year and take a bigger proportion of total travel share, these characteristics will begin to change.

For some of these characteristics the trends are reversing from the previous year. The average age of New Jersey visitors, which decreased in 2014, has now jumped to 49 years old, which is older than visitors to the average U.S. destination or to the Competitive Set by two years. New Jersey visitors are also only 33% likely to have children in the household (a 4 percentage point decrease from 2014), which is less than the average U.S. destination or to the Competitive Set.

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, this region experienced a decline in its share of visitors to the state (from 38% in 2014 to 35% in 2015) while the Gateway, Skylands, and Delaware River regions all saw growth in 2015. The only non-Atlantic City region to experience decline was the Shore region, which naturally draws a younger crowd to its beaches. It is likely that the average age of New Jersey visitors increased in 2015 despite the growth in non-Atlantic City regions because of this parallel decline in travel to the Shore region of the state.

Visitors to the non-Atlantic City regions tend to take longer trips and travel to visit and stay with friends and relatives. Conversely, visitors to the Greater Atlantic City region tend to take shorter trips and stay in paid accommodations, especially hotels.

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 2015 is that New Jersey fell from being the primary source of visitors to the State to being third behind New York and Pennsylvania. This translated into more visitors staying in paid accommodations and less visitors staying with family/friends, which led to a sizeable increase in the average spending per stay.

In 2015, activity participation in general has remained the same from 2014. The same activities are in the top ten for New Jersey in 2015 with only two position changes from 2014. Looking at New Jersey excluding Atlantic City, gambling drops from 20th in 2014 to 27th in 2015. 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. It should also 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 8.3 respectively on a 10-point scale), with the Satisfaction average unchanged from 2014 and the Value for the Money average increasing from 8.0 in 2014. For both dimensions, the State is rated the same regardless of whether or not Atlantic City is included in the analysis. Average Hotel Satisfaction ratings have stayed consistent at 8.4 despite an increase in the number of visitors staying in Paid Accommodations in 2015. 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 94 million visitors, spending approximately 20 billion dollars in 2015 — 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.

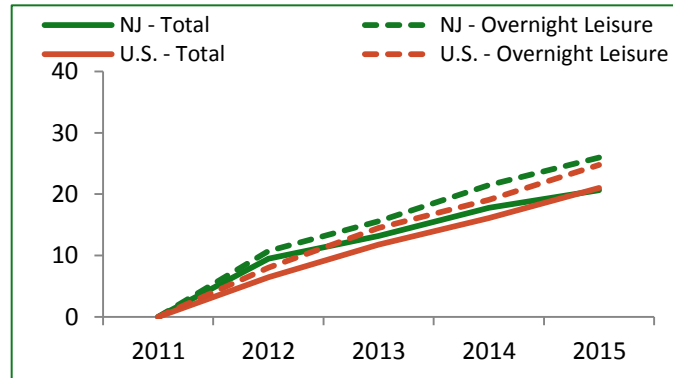
New Jersey continued to experience growth in total visitor volume and associated spending, with spending growing at higher rate than the average U.S. destination or the combined competitive geography of New York, Pennsylvania, Maryland, Virginia and North Carolina. While only slightly less, 2015 is the first year Since 2011, New Jersey has experienced slower growth than the average U.S. destination in total visitation. For the first time in several years New Jersey's growth in Overnight leisure visitors has fallen behind the average U.S. destination.

For most of the past several years spending in New Jersey has grown faster than in the average U.S. destination and 2015 is no exception. In 2015, this is primarily due to the much larger than average growth in leisure spending in the State, while business spending remained fairly flat, similar to the average destination. Thus it makes sense that overnight leisure spending is driving the increase. This despite the slower than average growth of these visitors to the state.

Increases in travel party size and length of stay are likely driving the increased spending in 2015.

Visitor Volume

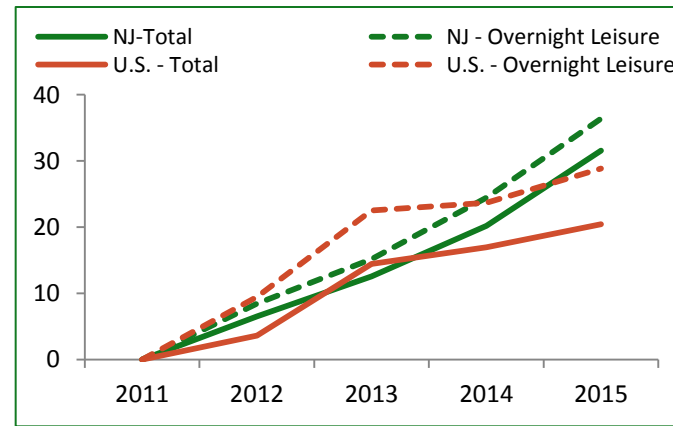
PERSON-STAYS (millions) INDEXED TO 2011



93.7 million Visitors — ↑ 2.4%
40.9 Overnight Leisure — ↑ 3.7%

Visitor Spending

DIRECT SPENDING (billions) INDEXED TO 2011



\$20.0 Billion Dollars — ↑ 3.9%
\$14.1 Overnight Leisure — ↑ 5.1%

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 2015 quarterly adjustments

Note: Data in these graphs indexed to 2011 — data shows yearly change as compared to 2011 rather than year over year percent change — this depicts a more accurate relationship between the segments

Visitor Volume and Spending

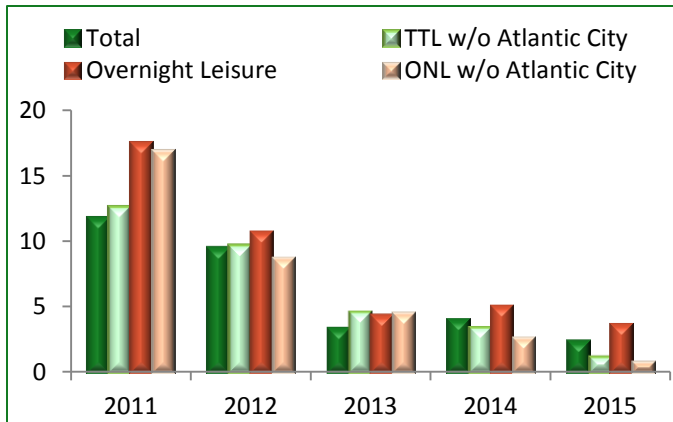
Visitation to, and spending in Atlantic City has always had a substantial impact on overall statistics for the State, but this may be changing.

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 2015, however, the non-Atlantic City portion of the State drove growth in total visitation while growth in overnight leisure visitation was split evenly between the non-Atlantic City portion of the state and Atlantic City.

For spending, this trend started in 2013 and has continued into 2015. For the third year in a row, the non-Atlantic City portion of the state continues to drive growth in both total and overnight

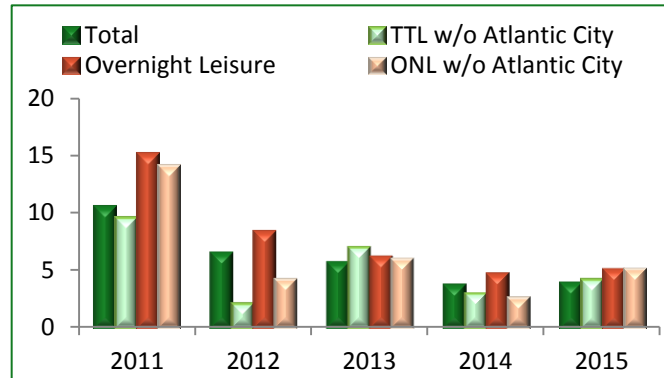
Visitor Volume

PERSON-STAYS (% change)



Visitor Spending

SPENDING (% change)



leisure spending.

In 2015 the growth in spending outpaces the growth in visitors, indicating that those who are coming are spending more than 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, the impact of their travel party 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

In 2015, New Jersey's overall market share of overnight leisure trips decreased 5% from 2014. Despite this decline, New Jersey maintained its third place ranking among the competition. 2015 marked the first decrease in market share for New Jersey since before 2010.

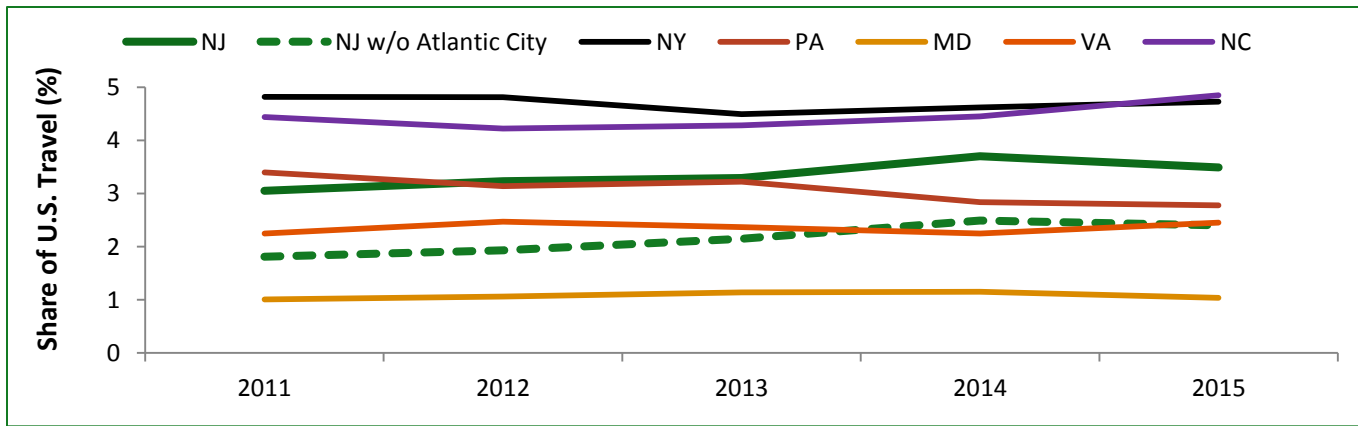
Among New Jersey's competitors both Pennsylvania and Maryland lost market share in 2015. North Carolina surpassed New York for the largest travel share among the competition, while the rest pretty much maintained their relative positions. New Jersey's overall decrease and Virginia's increase in travel share lifted Virginia above New Jersey when Atlantic City is not considered. This attests to the overall importance of the Atlantic City market in

maintaining New Jersey's position relative to the competition.

Pennsylvania continues to lose market share and the state that once held the top spot among this Competitive Set maintains its 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. Any renewed efforts are very slow in affecting change in traveler behavior. 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 maintains its position in 2015

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. In 2015, the average age and generational composition of visitors to the State continue to skew older than those who visit the average U.S. destination or the Competitive Set. This is due primarily to the demographics of visitors to Atlantic City, although increases in travel to the non-Atlantic City portions of the state are having an increasing effect on the generational makeup of travelers statewide.

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

and these percentages have increased slightly in 2015.

This may be due to the increasing number of older travelers visiting the non-Atlantic City portions of the State or to the improved economy. In a slow economy people take fewer trips and those likely to be cut are non-family travel.

Average incomes of New Jersey visitors increased in 2015 and are consistently 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.)	49	46	47	47
Employed	63%	68%	62%	62%
Retired	23%	16%	21%	20%
Average Income (000)	\$109.4	\$105.8	\$90.1	\$92.3
Children in HH	33%	35%	36%	35%
Children in Travel Party	16%	20%	16%	17%
Generations:				
Millennial (1981+)	23%	29%	28%	27%
GenX (1965-1980)	28%	33%	30%	31%
Boomer (1946-1964)	38%	30%	34%	34%
Silent/GI (1945 back)	11%	8%	9%	9%

Non-Atlantic City Visitors...

Younger

Lower Income

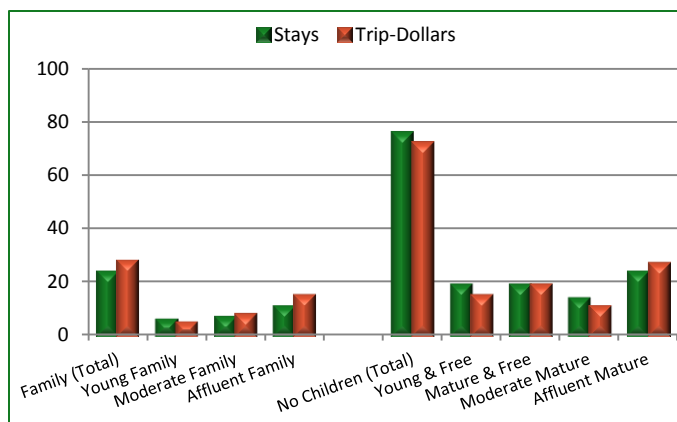
Include Kids in Travel Party

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. This pattern is similar for the State as a whole.

New Jersey

OVERNIGHT LEISURE STAYS (%) (2013-2015)

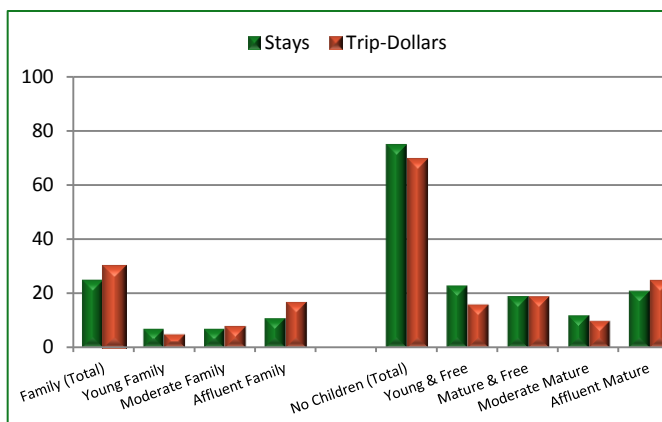


DKSA Lifestage Definitions

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 (%) (2013-2015)



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 8 out of 10 New Jersey visitors come from 7 states with about 19% coming from New Jersey itself and an additional 46% 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 333 miles — almost 100 miles more than in 2014, but still about 119 miles *less* than to the average U.S. destination and about 26 miles *less* than to New Jersey's Competitive Set. It is noteworthy that buses are used at the same rate as airplanes for travel to New Jersey, which is not the case for the average U.S. destination.

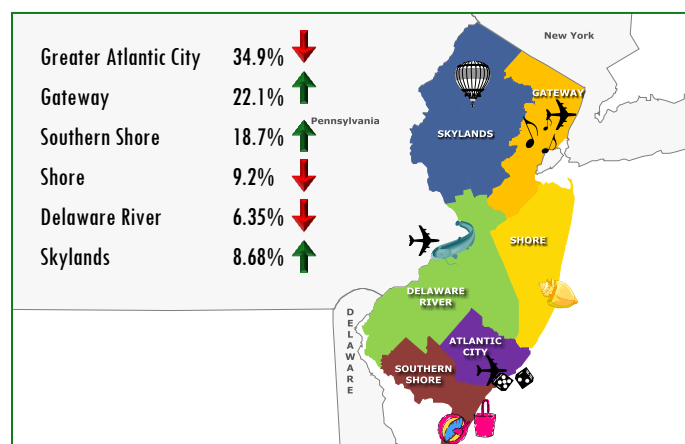
New Jersey Origin States

OVERNIGHT LEISURE SHARE OF PERSON-STAYS

New York	25.1%
Pennsylvania	20.4%
New Jersey	18.5%
Florida	5.2%
Maryland	5.0%
Virginia	2.9%
Massachusetts	2.8%
Other	20.1%

New Jersey Destination Regions

OVERNIGHT LEISURE SHARE OF PERSON-STAYS



Where do New Jersey's visitors go?

Despite experiencing a slight decrease in 2015, 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 2.5%.

Although the Delaware River and Gateway regions experienced modest growth in 2015, the Skylands region was the big winner with an increase of almost 4%. This can likely be attributed mostly to the drop in travel to the Shore region, which is still recovering economically, and a drop in travel to Atlantic City.

64% of New Jersey visitors come from the tri-state area

Why do travelers visit New Jersey?

Visiting Friends or Relatives and Getaway Weekends each account for nearly one third of overnight leisure trips to New Jersey in 2015. However, if Atlantic City is excluded, Getaway Weekends drop significantly and the overwhelming reason for leisure travel is to Visit Friends or Relatives.

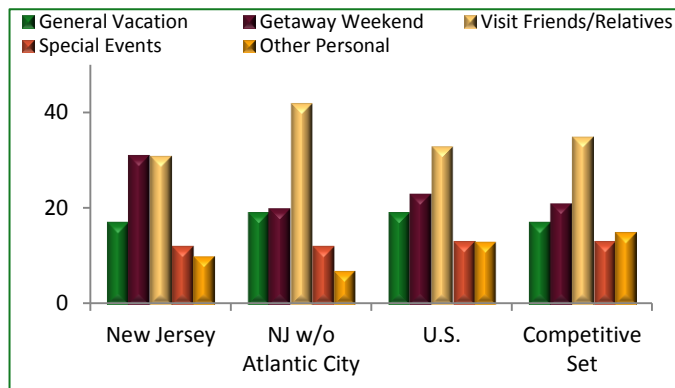
Getaway Weekends still account for a larger share of vacation-type travel than do General Vacations, and the percentage of General Vacations decreased from 2014. This is likely related to the drop in travel to the Shore region in 2015.

When Atlantic City is excluded, Getaway Weekends drop substantially and Visiting Friends and Relatives jumps to 42%. 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 2015 visitors spent a larger share of their travel dollar on transportation, food & beverage, and lodging than in 2014, with decreases in shopping and entertainment. The average daily spending in the State as a whole is over 11% higher than when Atlantic City is excluded from the analysis. Again demonstrating the value of the Atlantic City area.

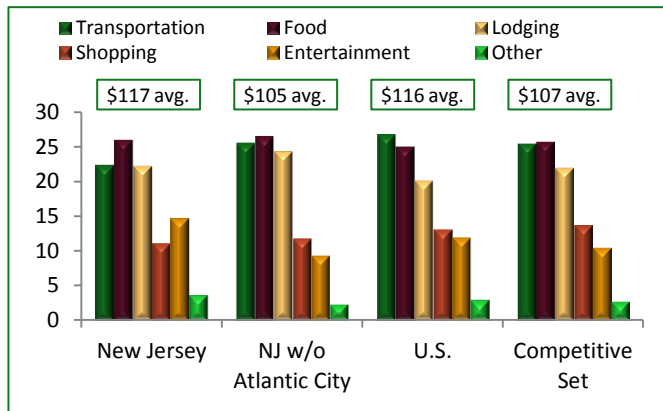
Purpose of Travel

OVERNIGHT LEISURE (%) PERSON-STAYS



Per-Person-Per-Day Spending

OVERNIGHT LEISURE (%) PERSON-DAYS



Atlantic City area drives
Weekend Getaways
and Spending

What type of accommodations do they stay in?

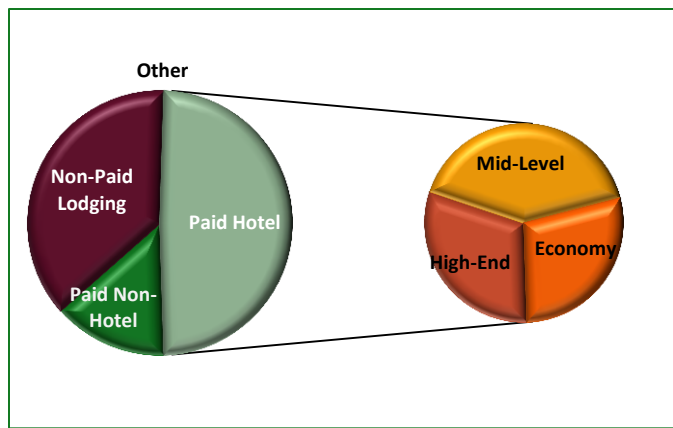
In 2015, 63% of overnight leisure visitors to New Jersey stayed in paid accommodations, which is just above the average U.S. destination or the Competitive Set (62% and 60%, respectively). Among those staying in New Jersey's paid accommodations, almost 80% stay in hotels.

When Atlantic City is excluded from the analysis the percentage of visitors staying in paid accommodations drops to 51%, which is more than 10 percentage points less than either the average U.S. destination or the Competitive Set. The percentage of paid accommodation visitors who stay in hotels drops to about 60%.

Among those visiting regions excluding Atlantic City, half are staying with Friends or Relatives. Thus, it is clear that the Atlantic

New Jersey

OVERNIGHT LEISURE PERSON-STAYS



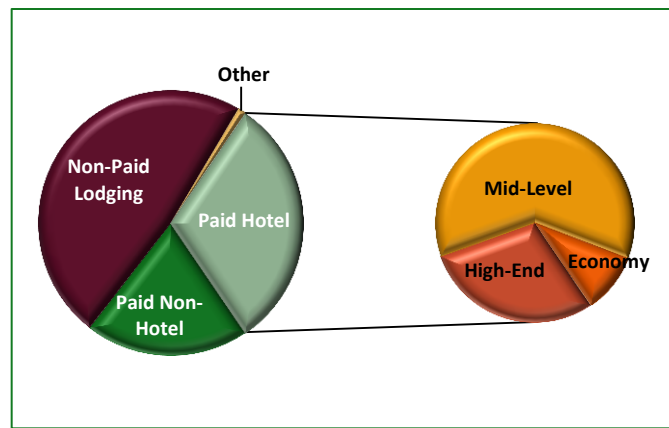
City region is driving the large number of hotel stays in the State.

Visitors to both New Jersey as a whole and New Jersey excluding Atlantic City spend more per day on lodging than those visiting the average U.S. destination or their Competitive Set. However, when Atlantic City is excluded, visitors spend 11% more per day on lodging than the state as a whole despite lower spending averages overall.

This isn't surprising considering that for New Jersey as a whole, 71% of paid hotel visitors stay in high-end and mid-level hotels; but when we exclude Atlantic City, 90% of paid hotel visitors stay in high-end or mid-level hotels.

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?

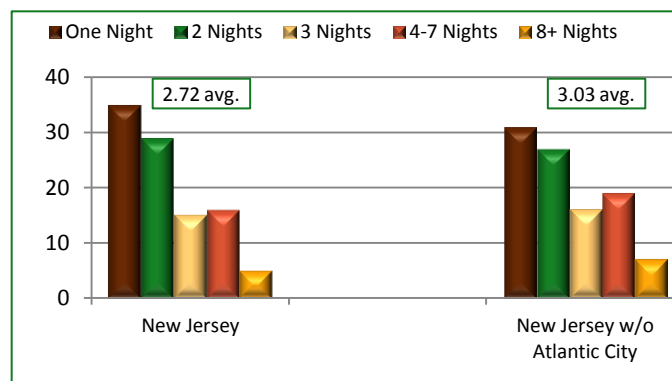
Travel parties consisting of one or two adults account for almost three-quarters of the state's overnight leisure travel.

Not surprisingly, the portion of the state excluding Atlantic City accounts for a smaller share of 3+ adult travel parties and a larger share of children present than does the entire state of New Jersey, indicating that travel parties to Atlantic City generally include fewer children and more adults.

This is reflected in the average travel party size. At 2.17 persons, New Jersey's travel party average is larger than the U.S. and the

Stay Length

OVERNIGHT LEISURE STAYS – (1+ NIGHTS)



Competitive Set (2.13 persons and 2.14 persons, respectively). However, if we exclude Atlantic City, the average size drops to 2.12.

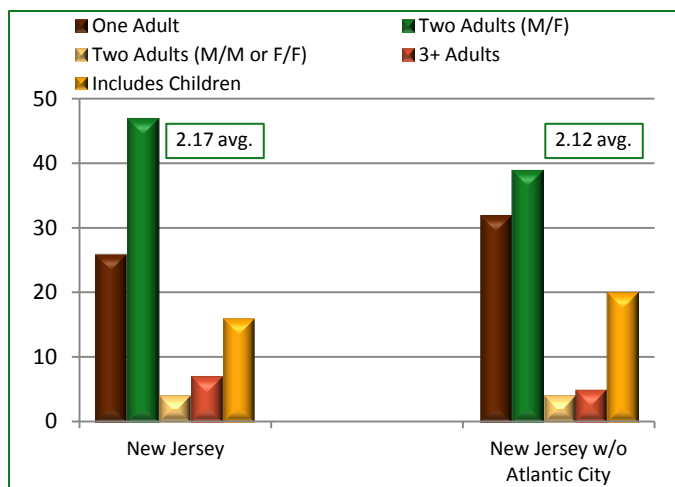
With an average of 2.7 nights, visitors to New Jersey have longer overnight leisure stays than visitors to either the average U.S. destination or to the Competitive Set. This average would be even higher if we excluded the getaway weekend destination of Atlantic City.

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

Larger Travel Parties
Longer Length of Stay
than other U.S. destinations

Travel Party Composition

OVERNIGHT LEISURE STAYS



What do New Jersey visitors do?

In 2015, activity participation generally seemed to stay consistent with 2014 levels. Most activities had no change while the rest had very small increases and decreases 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. Visiting Friends and Relatives
5. Shopping

These five activities also made up the top five in 2014 and in pretty much the same rank order. The only difference is that Visiting Friends and Relatives and Shopping switched places.

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 Other Personal Celebrations followed closely by Nightlife and the much less lucrative activities of Holiday Celebration (Thanksgiving, July 4th, etc.).

In fact, just above Hiking and below Funeral/Memorial, Gambling ranks only 27th for this portion of the State.

1. Beach/Waterfront
2. Visiting Friends and Relatives
3. Culinary/Dining Experience
4. Shopping
5. Other Personal Celebrations

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 during their stay, they represent a higher level of spending than they do visitation. The only exception is in Visiting Friends and Relatives which represents a higher level of visitation than it does spending. The most profitable activities for the state in terms of trip-dollars generated are visiting New Jersey's Beaches and Waterfront, Shopping, Culinary/Dining, and Gambling.

Gambling ↑
Beach/Waterfront ↑
Other activities — mixed,
but mostly unchanged

How do New Jersey visitors rate the State?

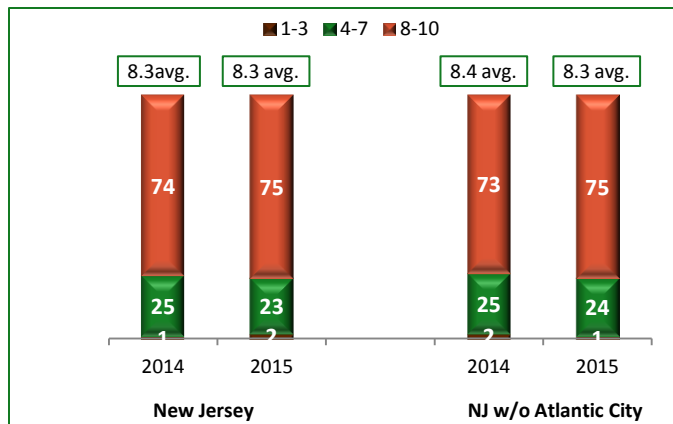
Respondents are asked to rate their overall satisfaction with the destinations they visit as well as the overall value for the money the destination provides. Ratings are on a 10-point scale, where 1 is low or 'poor' and 10 is high or 'excellent'.

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 2015 all competitive states achieved average ratings of between 8.4 and 8.6, similar to the average U.S. destination.

Excellent satisfaction ratings for New Jersey, whether or not Atlantic City is included, remained stable in 2015 indicating that improved satisfaction levels achieved in 2013 continue.

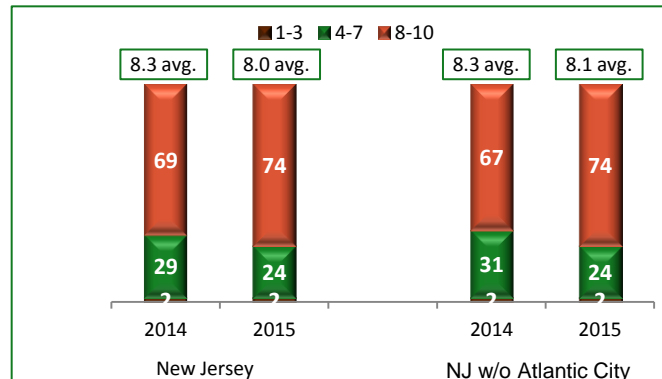
Overall Satisfaction

OVERNIGHT LEISURE PERSON-STAYS



Value for the Money

OVERNIGHT LEISURE PERSON-STAYS



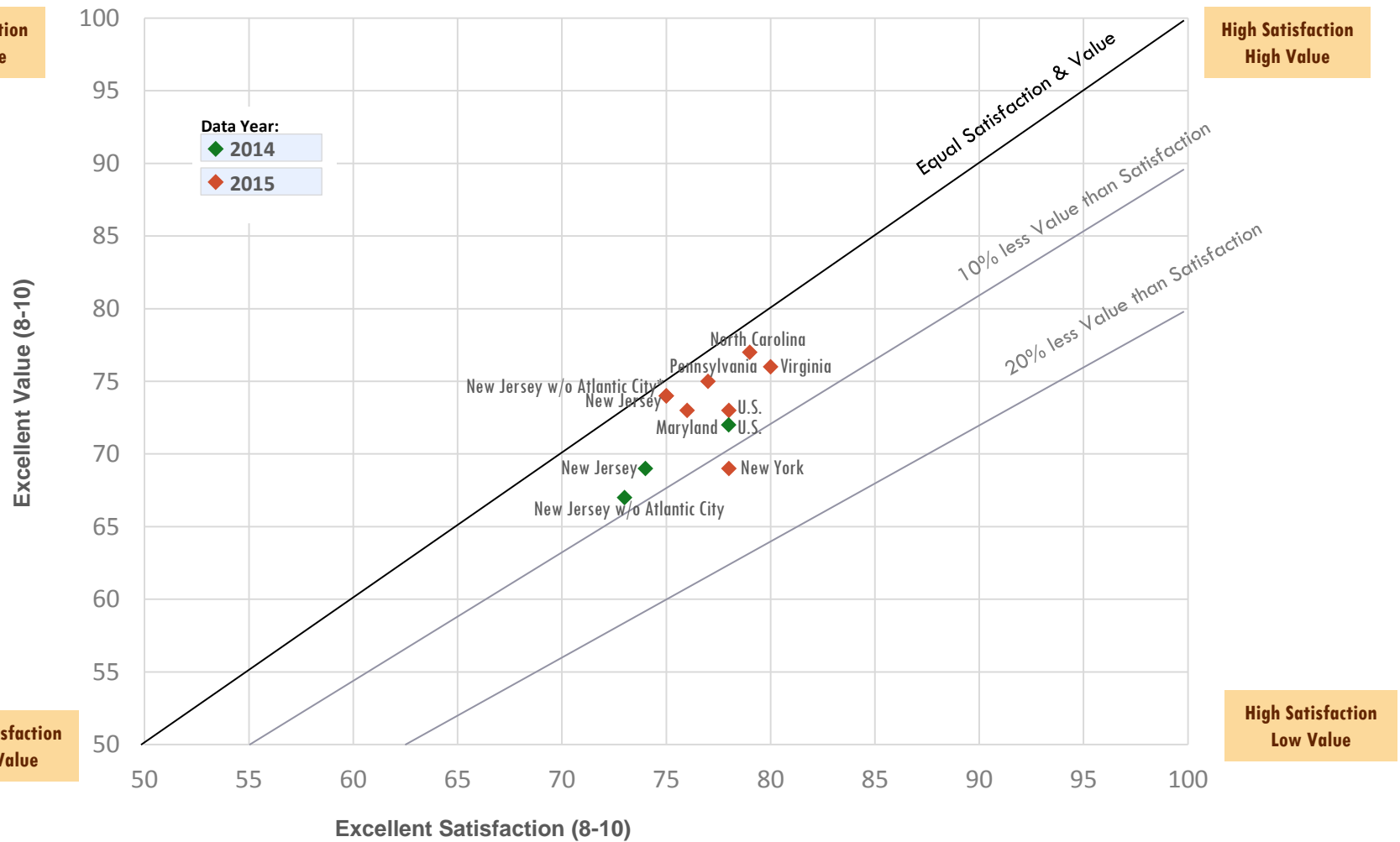
Since 2013, Value for the Money ratings have steadily increased year over year. In 2015, the Value rating increased for the entire state as well as for the non-Atlantic City regions. Excluding New York (no change) and North Carolina (decrease), the competitive states saw incremental increases in the Value ratings for 2015 as well, although the Competitive Set as a whole stayed the same.

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 return/spend more, but also 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

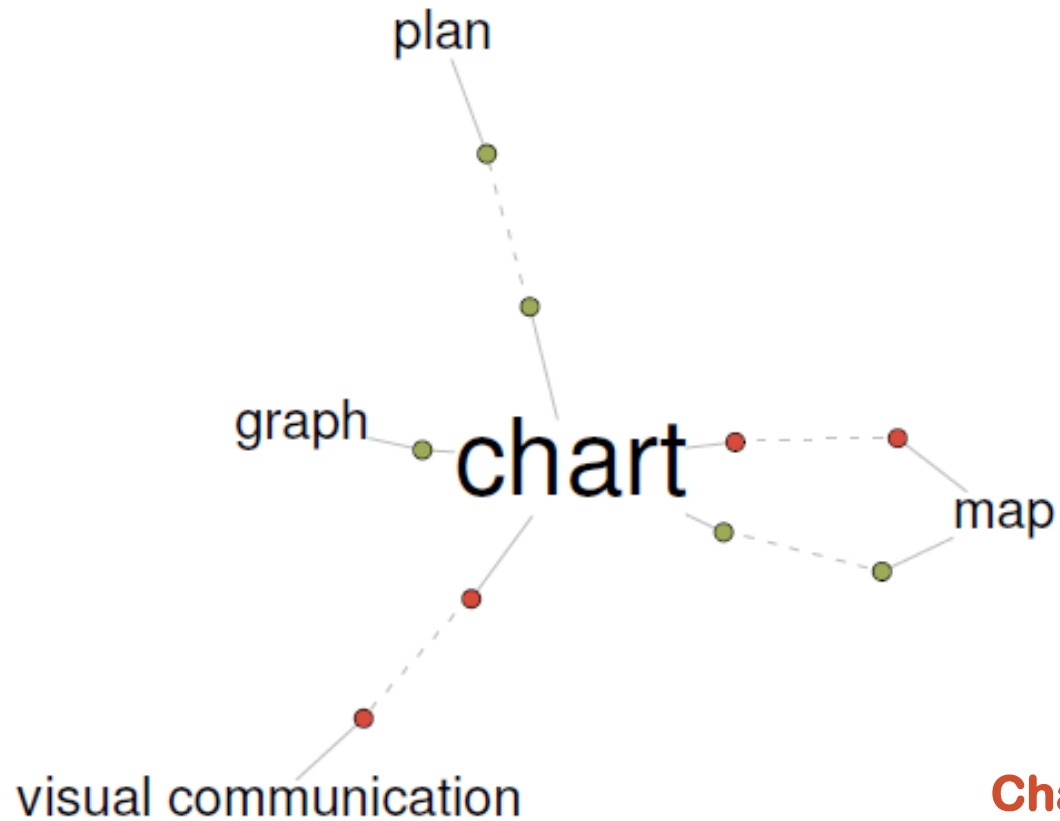
New Jersey Ratings

PERFORMANCE RATINGS



Segment: 2015/2014 Overnight Leisure Person-Stays (%) • New Jersey N = 1,056 household count

*Note: Index value for 2015 New Jersey w/o Atlantic City is identical to the 2015 New Jersey value



Charts and Graphs

New Jersey Year-End 2015 Visitor Profile

U.S. Travel Segments

MARKET SHARE

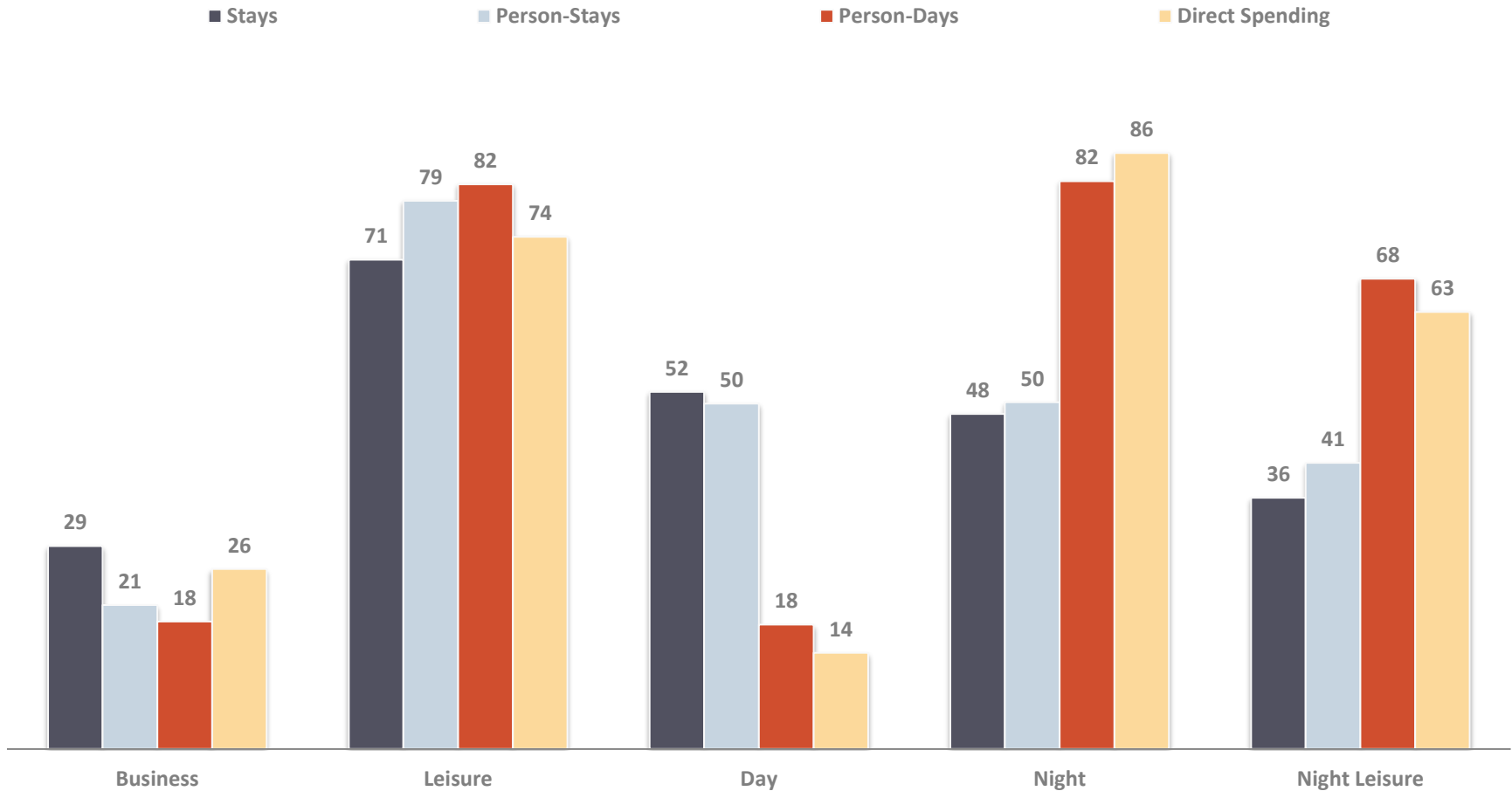


Chart 1 • Segment: 2015 Total Volume (%)

U.S. Travel Volume Change by Division

VOLUME

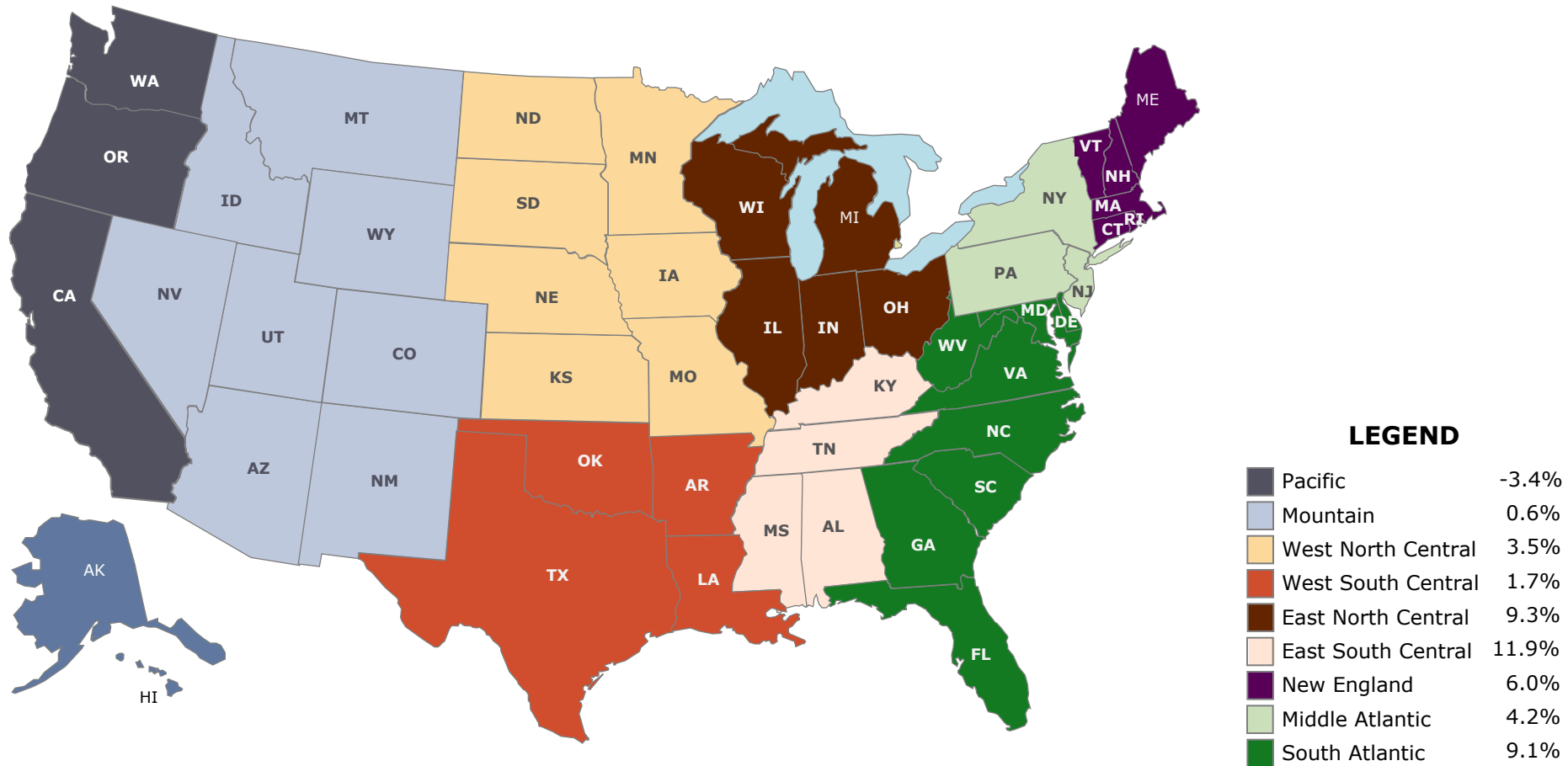


Chart 2 • Segment: 2014/2015 Overnight Leisure Person-Stays (%)

New Jersey Travel Segments

MARKET SHARE

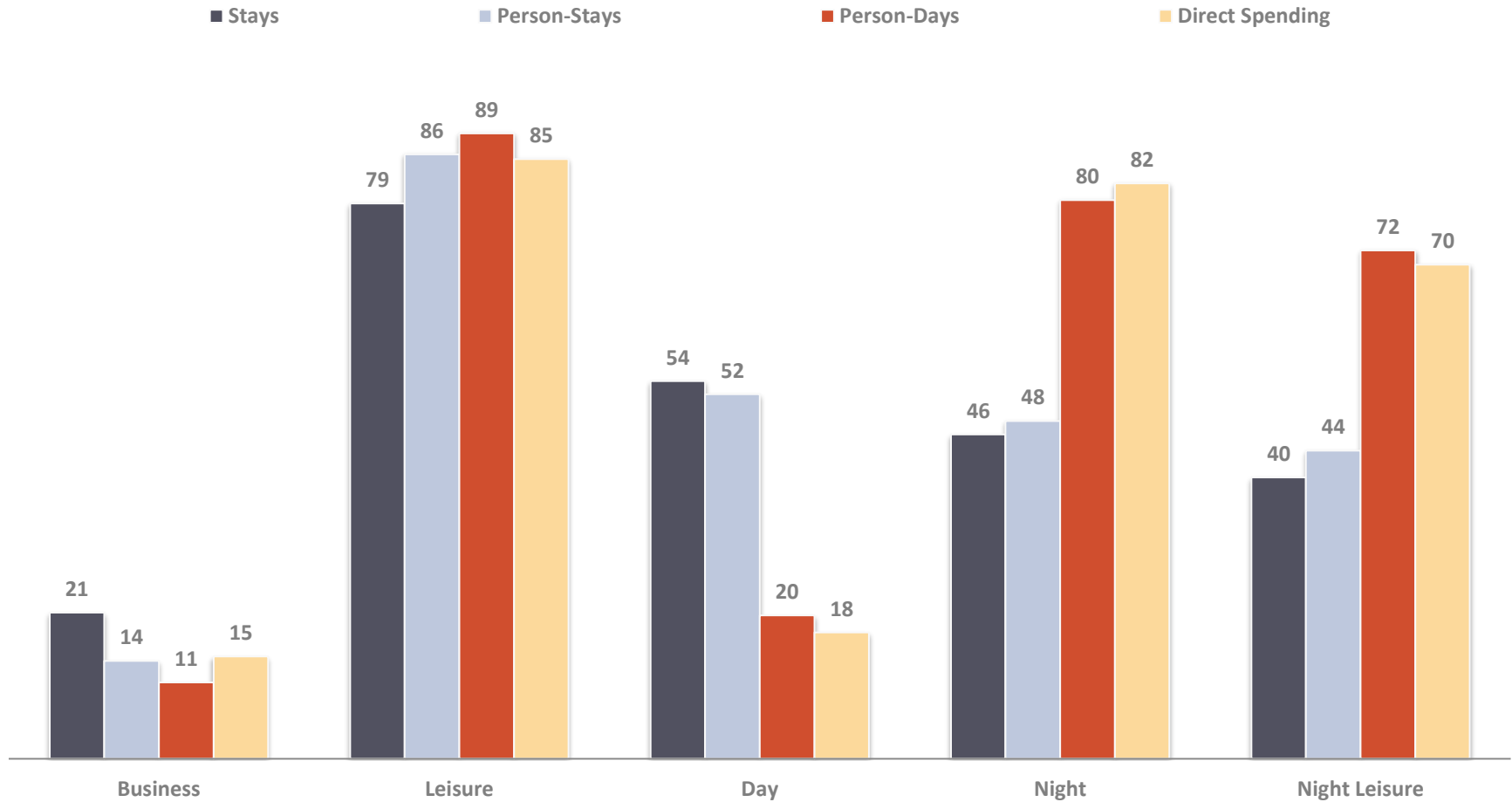


Chart 3 • Segment: 2015 Total Volume (%)

New Jersey Person-Stays Volume

VOLUME

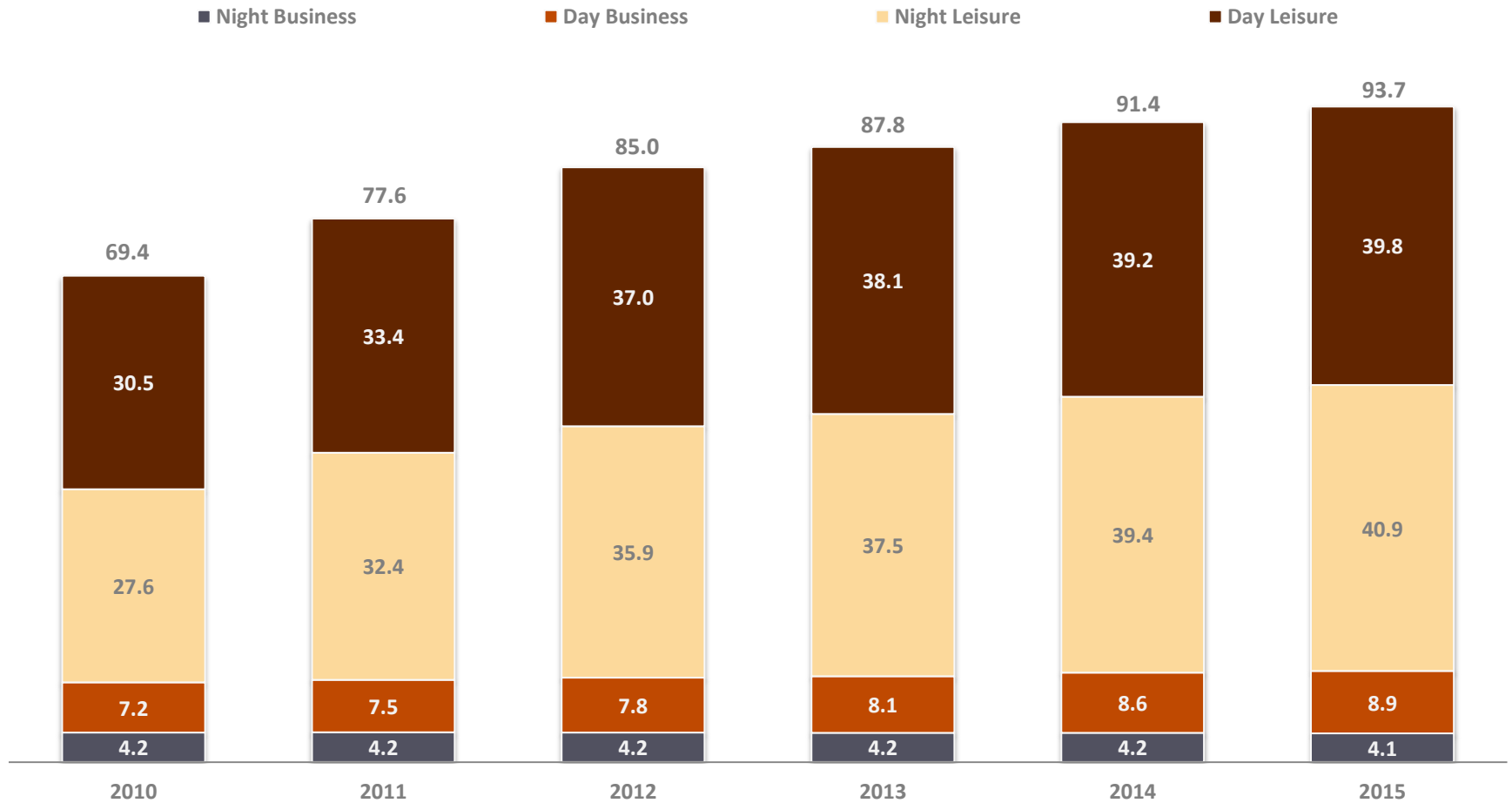


Chart 4 • in Millions

New Jersey Person-Stays Volume

VOLUME

New Jersey						U.S.
	11/10	12/11	13/12	14/13	15/14	15/14
Total	11.8%	9.5%	3.4%	4.1%	2.4%	4.3%
Business	3.4%	2.7%	1.3%	4.6%	1.5%	3.7%
Leisure	13.4%	10.7%	3.7%	4.0%	2.6%	4.4%
Day	8.7%	9.5%	3.0%	3.6%	1.8%	3.9%
Night	15.4%	9.4%	3.8%	4.6%	3.1%	4.7%
Day Business	4.6%	4.5%	2.6%	7.0%	3.5%	3.5%
Day Leisure	9.7%	10.7%	3.0%	2.8%	1.5%	4.0%
Night Business	1.3%	-0.4%	-1.1%	0.0%	-2.3%	4.0%
Night Leisure	17.5%	10.7%	4.4%	5.1%	3.7%	4.8%

Chart 5 • % change

New Jersey Direct Spending Volume

DIRECT SPENDING

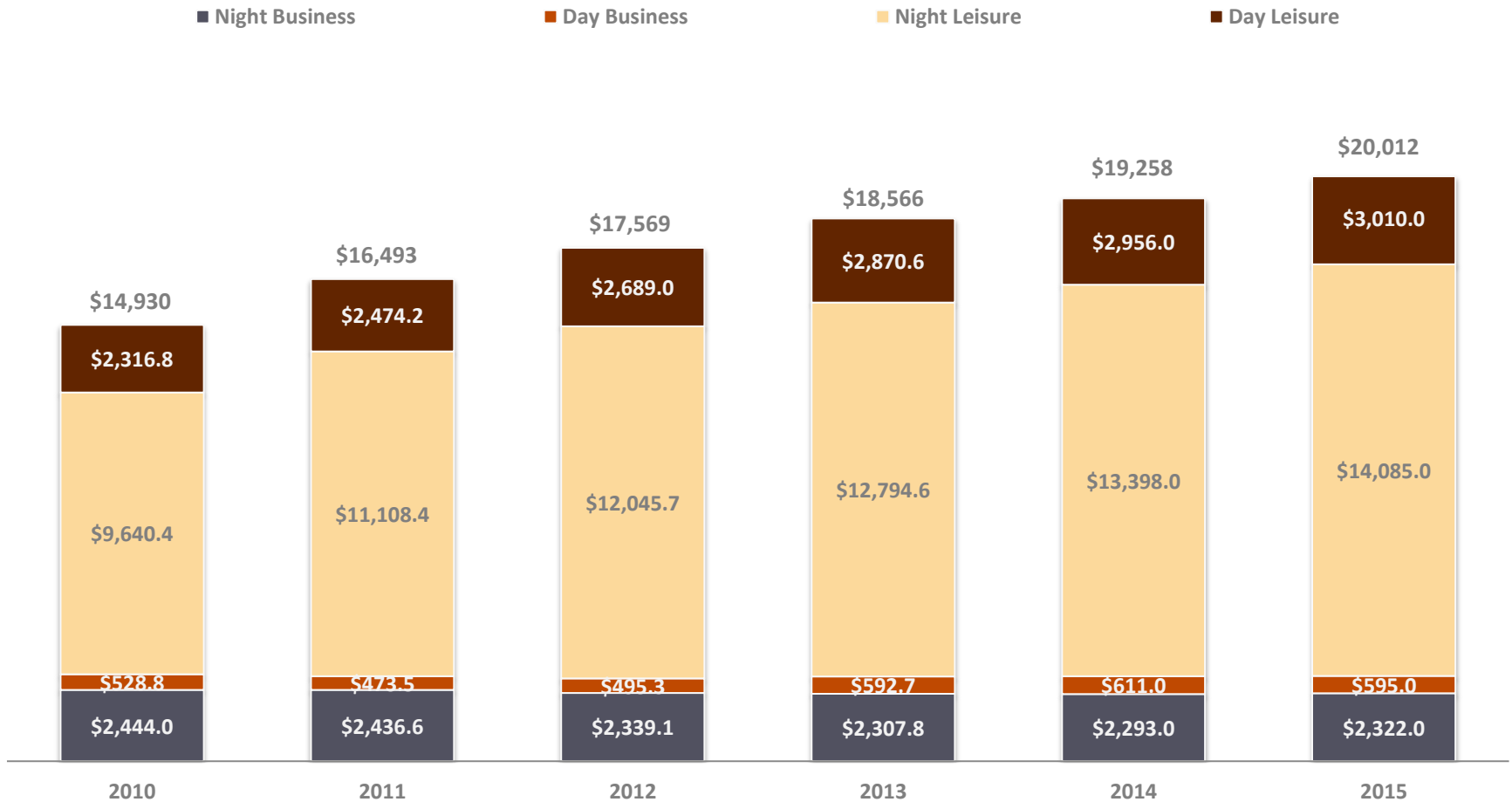


Chart 6 • \$ Millions

New Jersey Direct Spending Volume

DIRECT SPENDING

	New Jersey					U.S.
	11/10	12/11	13/12	14/13	15/14	15/14
Total	10.5%	6.5%	5.7%	3.7%	3.9%	2.9%
Business	-2.1%	-2.6%	2.3%	0.1%	0.4%	0.4%
Leisure	13.6%	8.5%	6.3%	4.4%	4.5%	3.9%
Day	3.6%	8.0%	8.8%	3.0%	1.1%	0.5%
Night	12.1%	6.2%	5.0%	3.9%	4.6%	3.4%
Day Business	-10.5%	4.6%	19.7%	3.2%	-2.7%	-5.6%
Day Leisure	6.8%	8.7%	6.8%	3.0%	1.8%	2.4%
Night Business	-0.3%	-4.0%	-1.3%	-0.7%	1.3%	1.2%
Night Leisure	15.2%	8.4%	6.2%	4.7%	5.1%	4.2%

Chart 7 • % change

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

MARKET SHARE

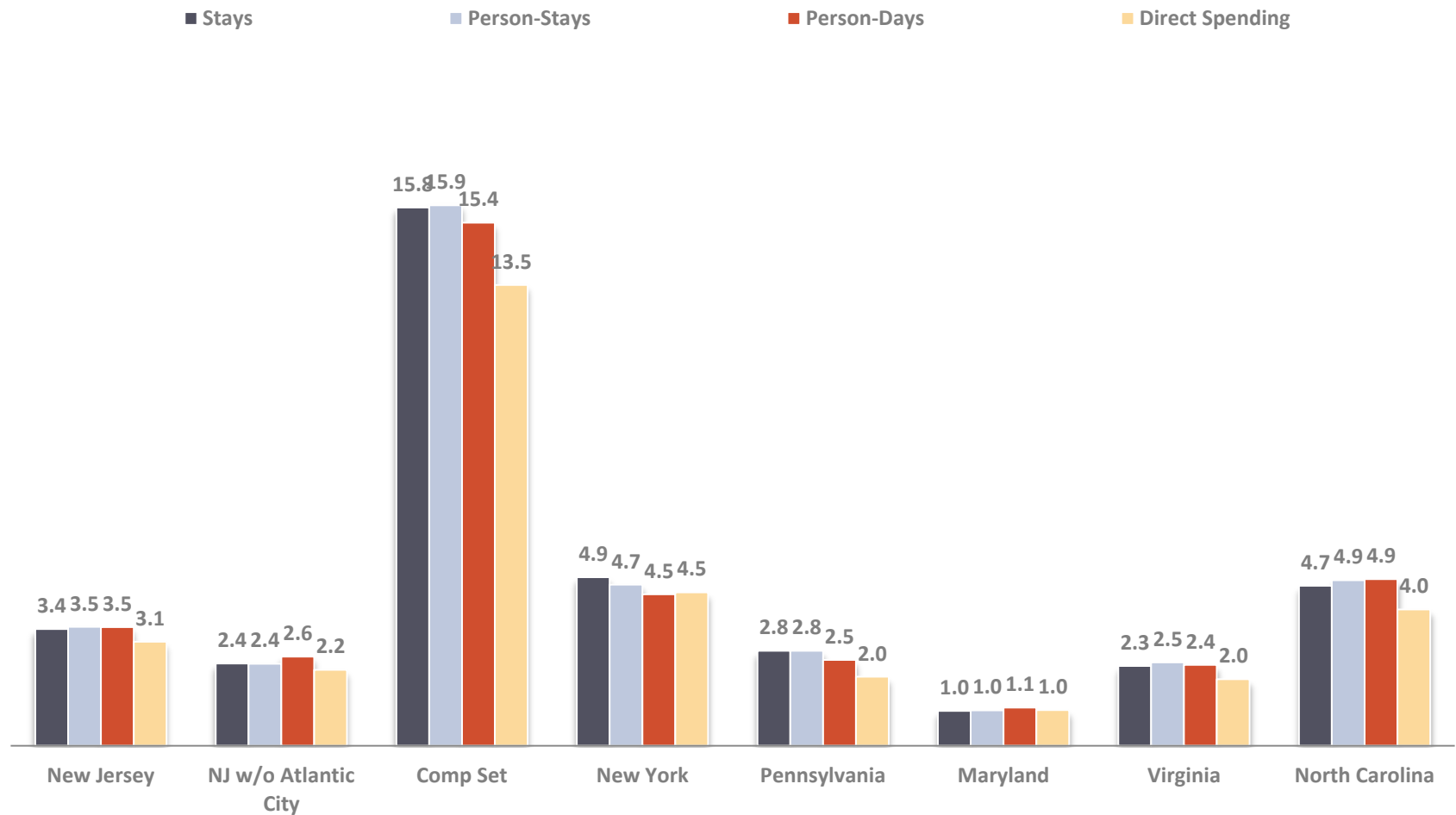


Chart 8 • Segment: 2015 Overnight Leisure (%) • New Jersey N = 1,056 household count

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

DEMOGRAPHICS

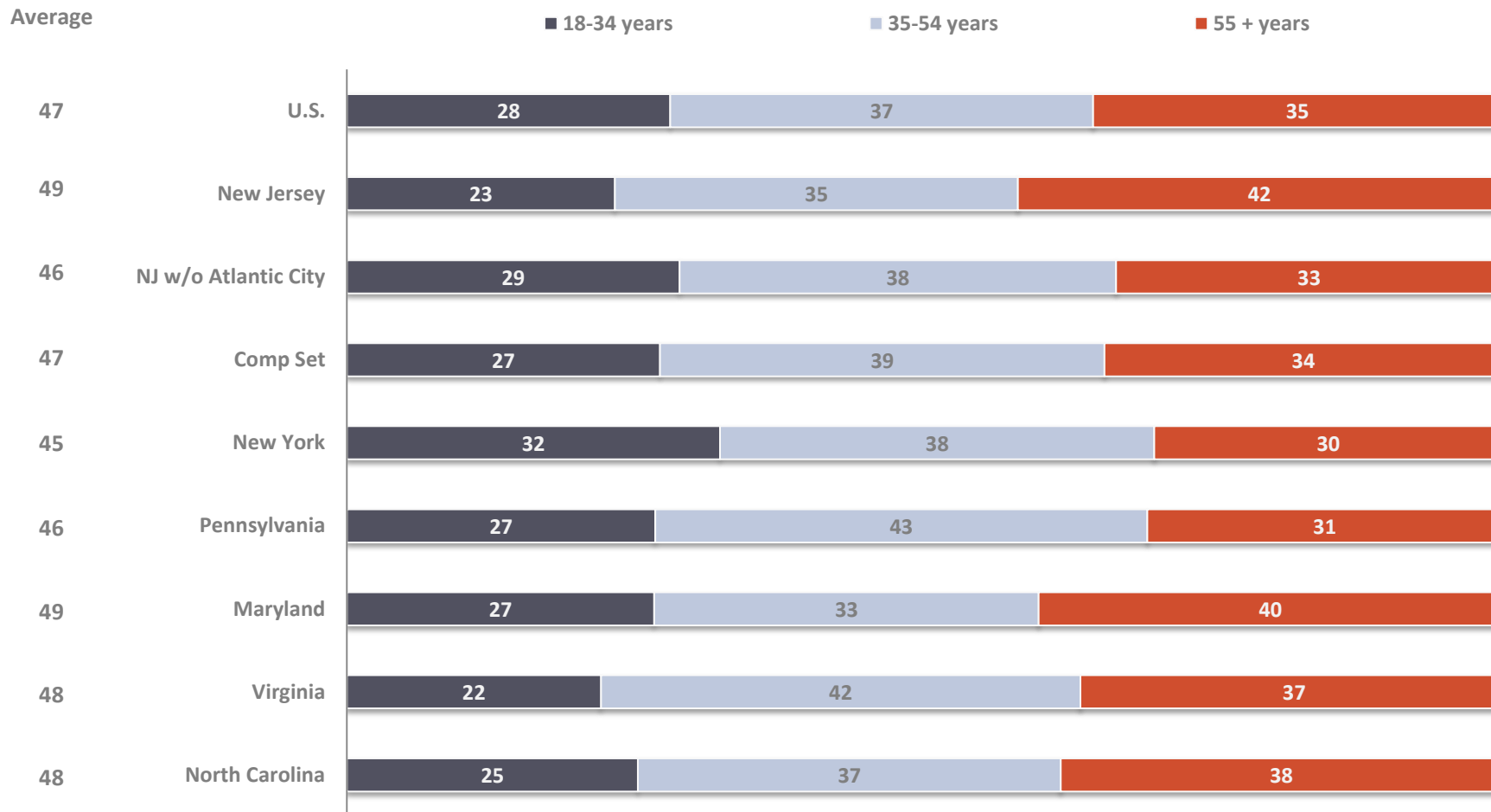


Chart 9 • Segment: 2015 Overnight Leisure Person-Stays (%) • New Jersey N = 1,056 household count

New Jersey Avg. Party per Stay Spending by Age

DEMOGRAPHICS

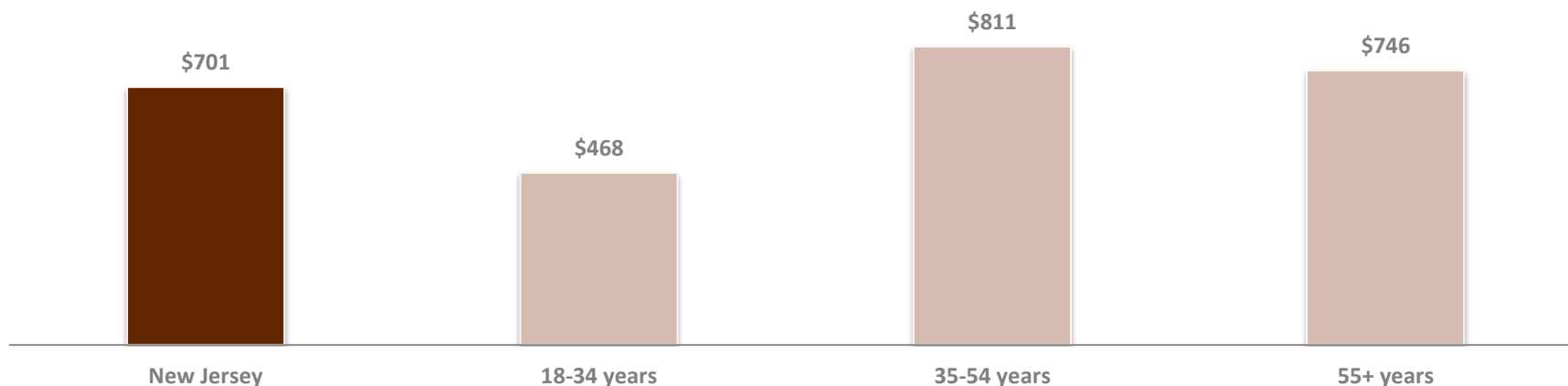


Chart 10 • Segment: 2013-2015 Overnight Leisure Stays (\$) • New Jersey N = 3,864 household count

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

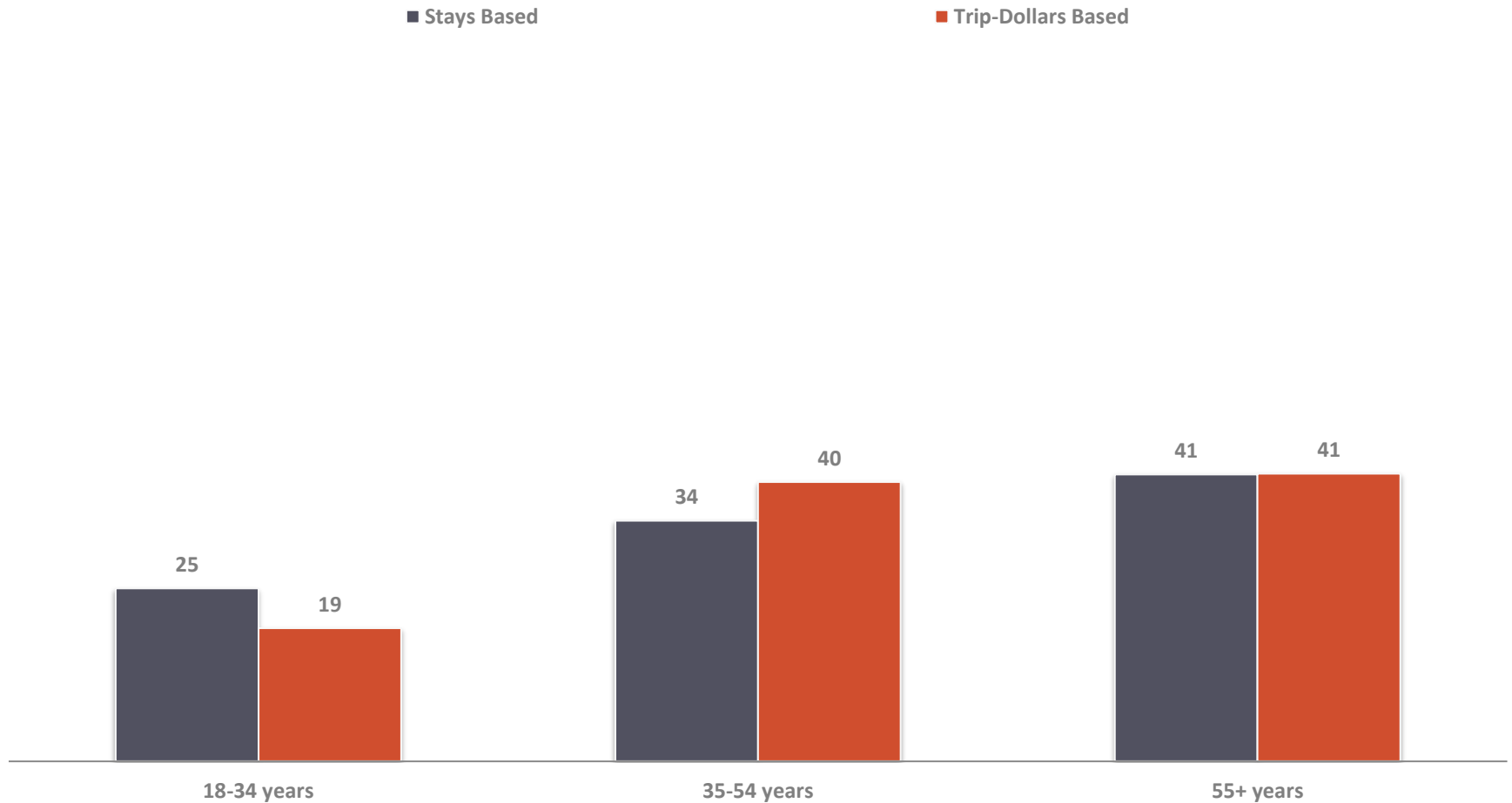


Chart 11 • Segment: 2013-2015 Overnight Leisure (%) • New Jersey N = 4,125 household count

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

DEMOGRAPHICS

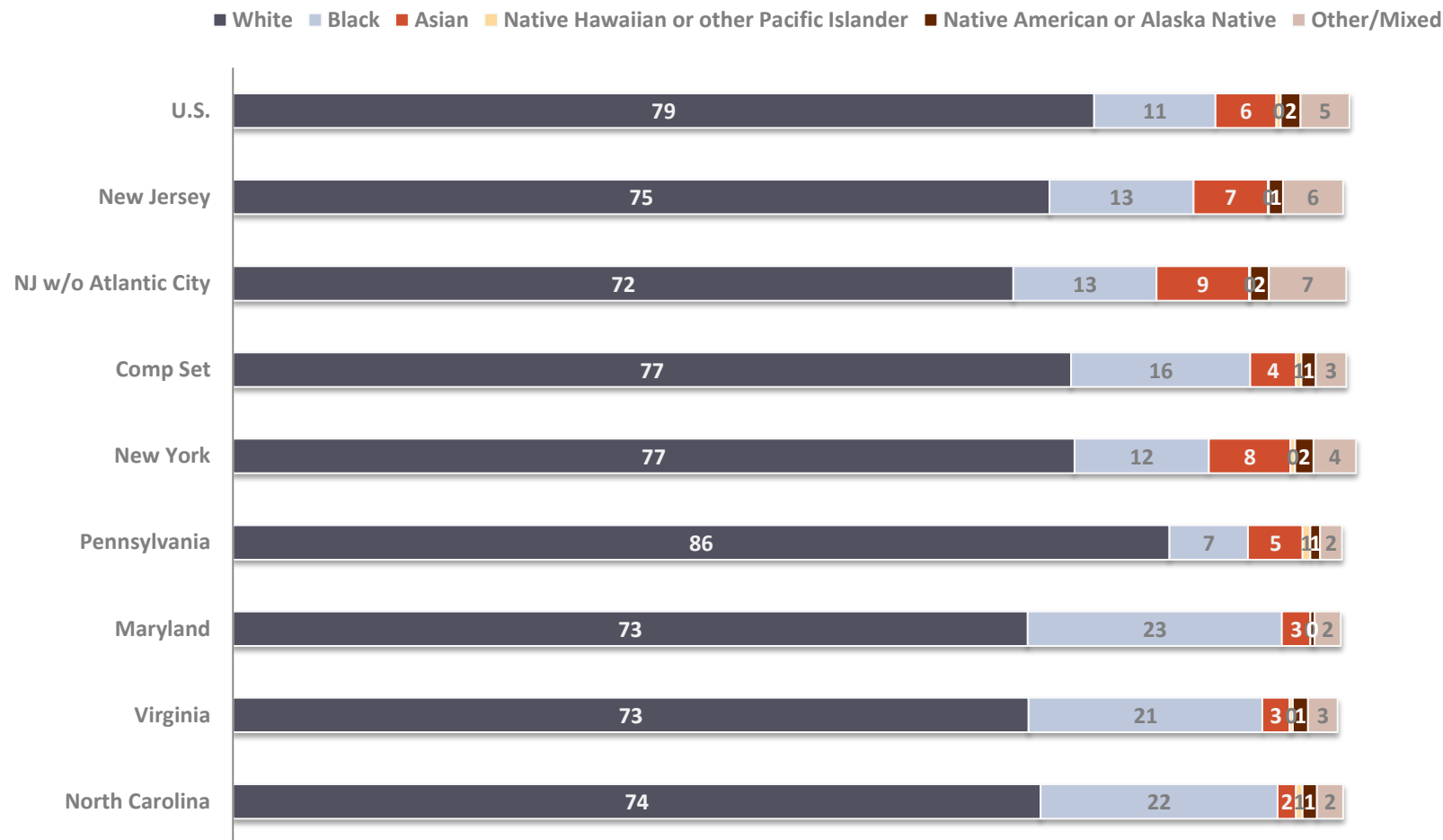


Chart 12 • Segment: 2015 Overnight Leisure Person-Stays (%) • New Jersey N = 1,056 household count

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

DEMOGRAPHICS

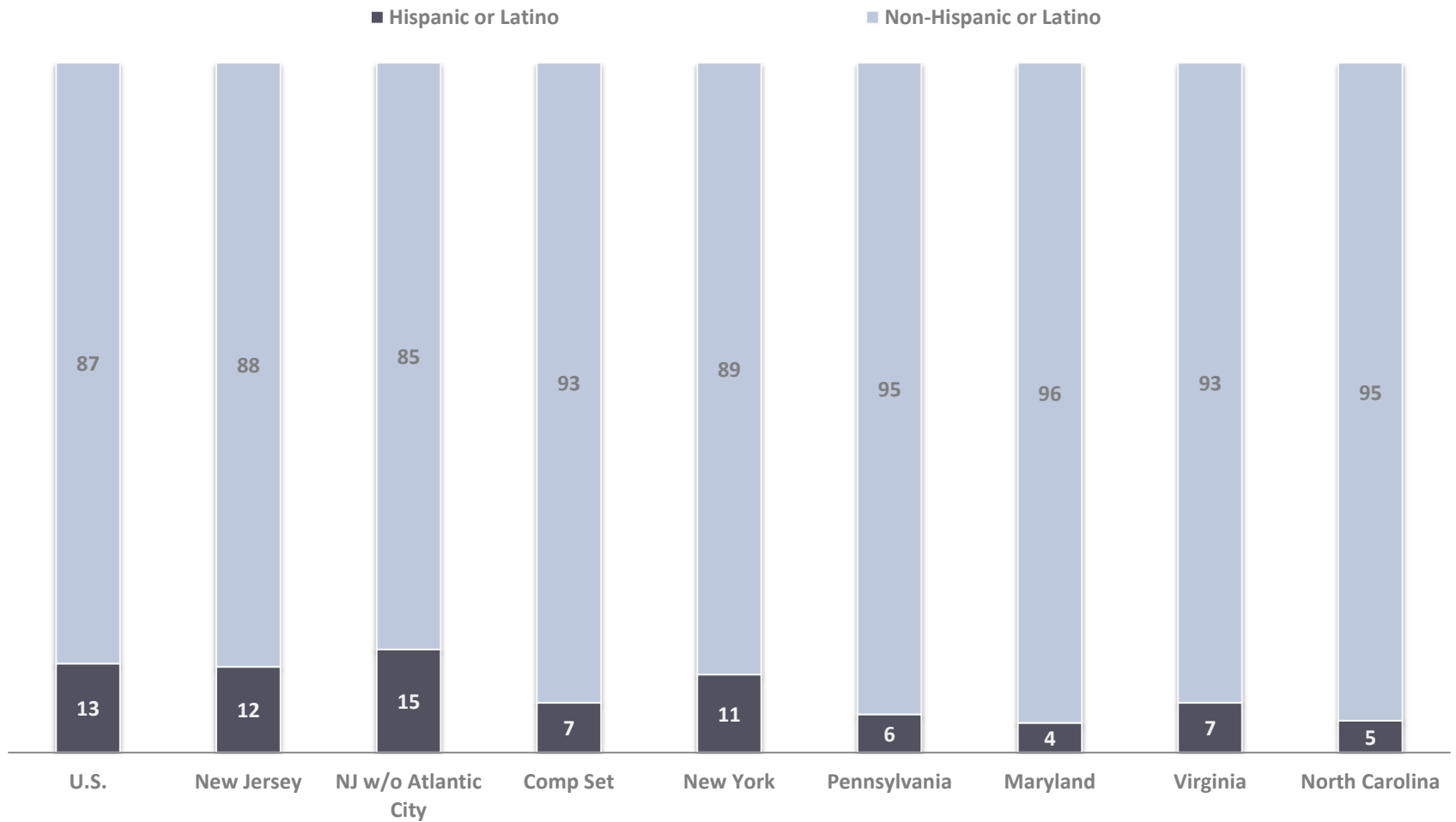


Chart 13 • Segment: 2015 Overnight Leisure Person-Stays (%) • New Jersey N = 1,056 household count

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

DEMOGRAPHICS



Chart 14 • Segment: 2015 Overnight Leisure Person-Stays (%) • New Jersey N = 1,056 household count

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

DEMOGRAPHICS

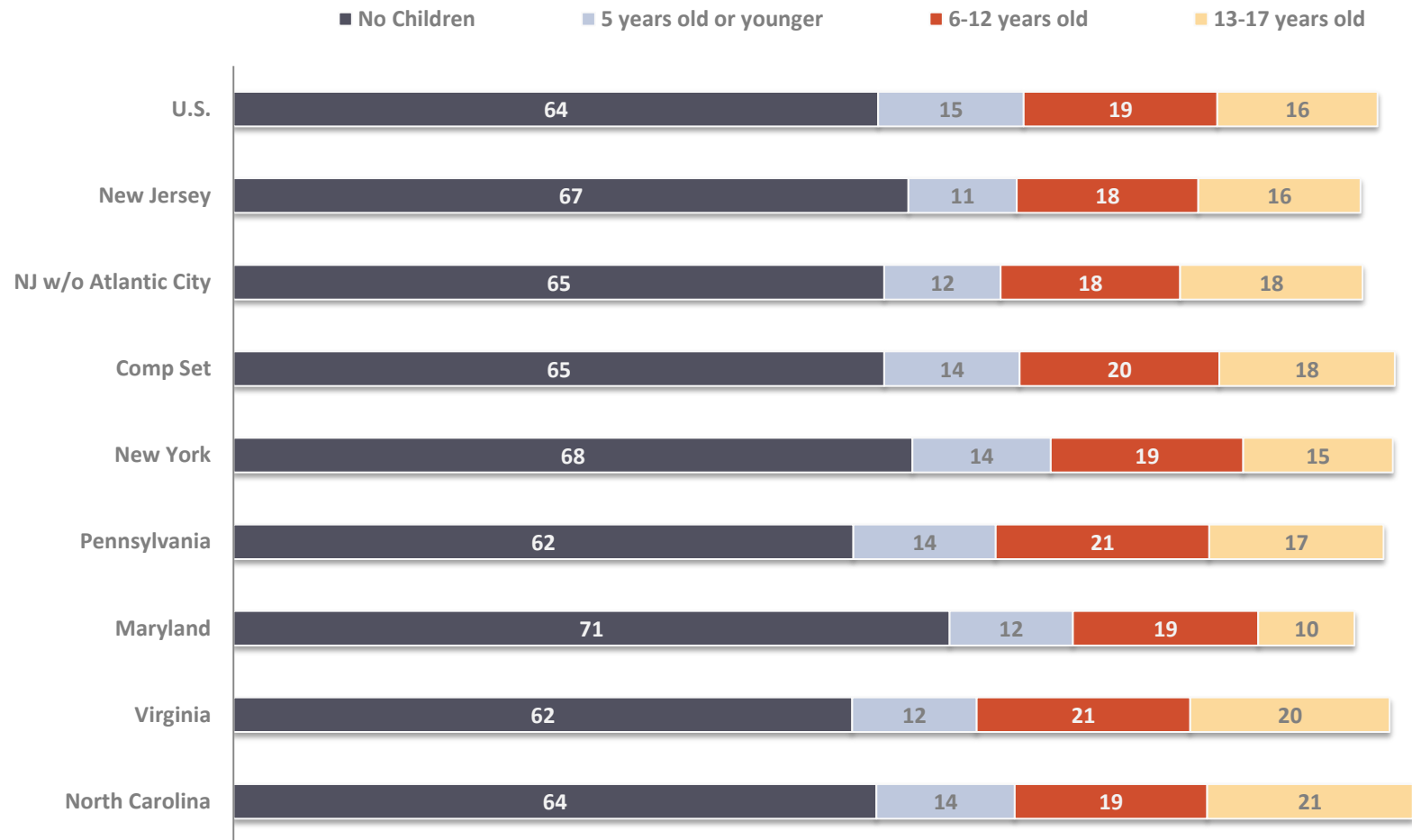


Chart 15 • Segment: 2015 Overnight Leisure Person-Stays (%) • New Jersey N = 1,056 household count

GLOSSARY

Sum exceeds 100% due to multiple-children households.

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

DEMOGRAPHICS

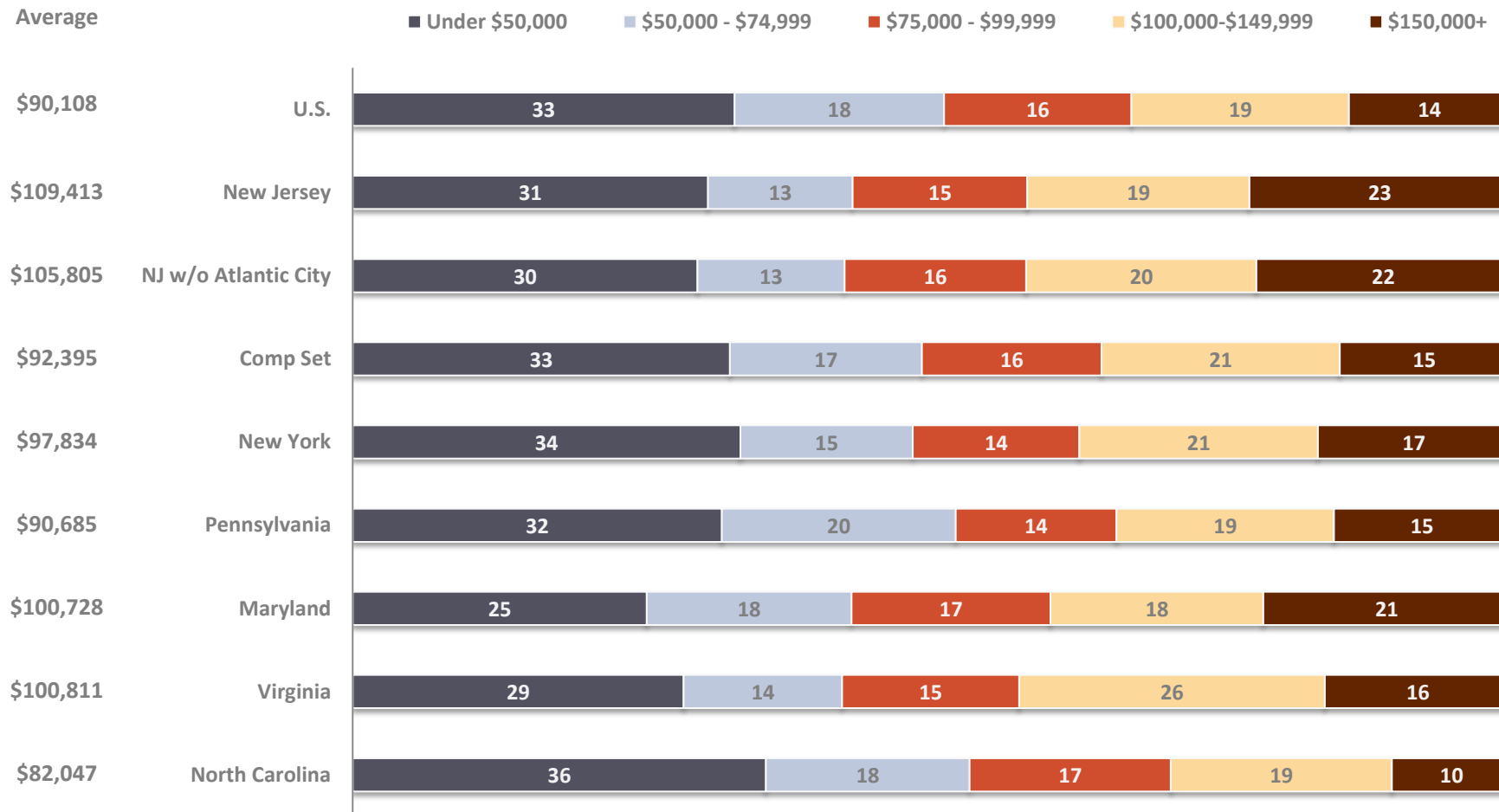


Chart 16 • Segment: 2015 Overnight Leisure Person-Stays (%) • New Jersey N = 1,056 household count

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

DEMOGRAPHICS

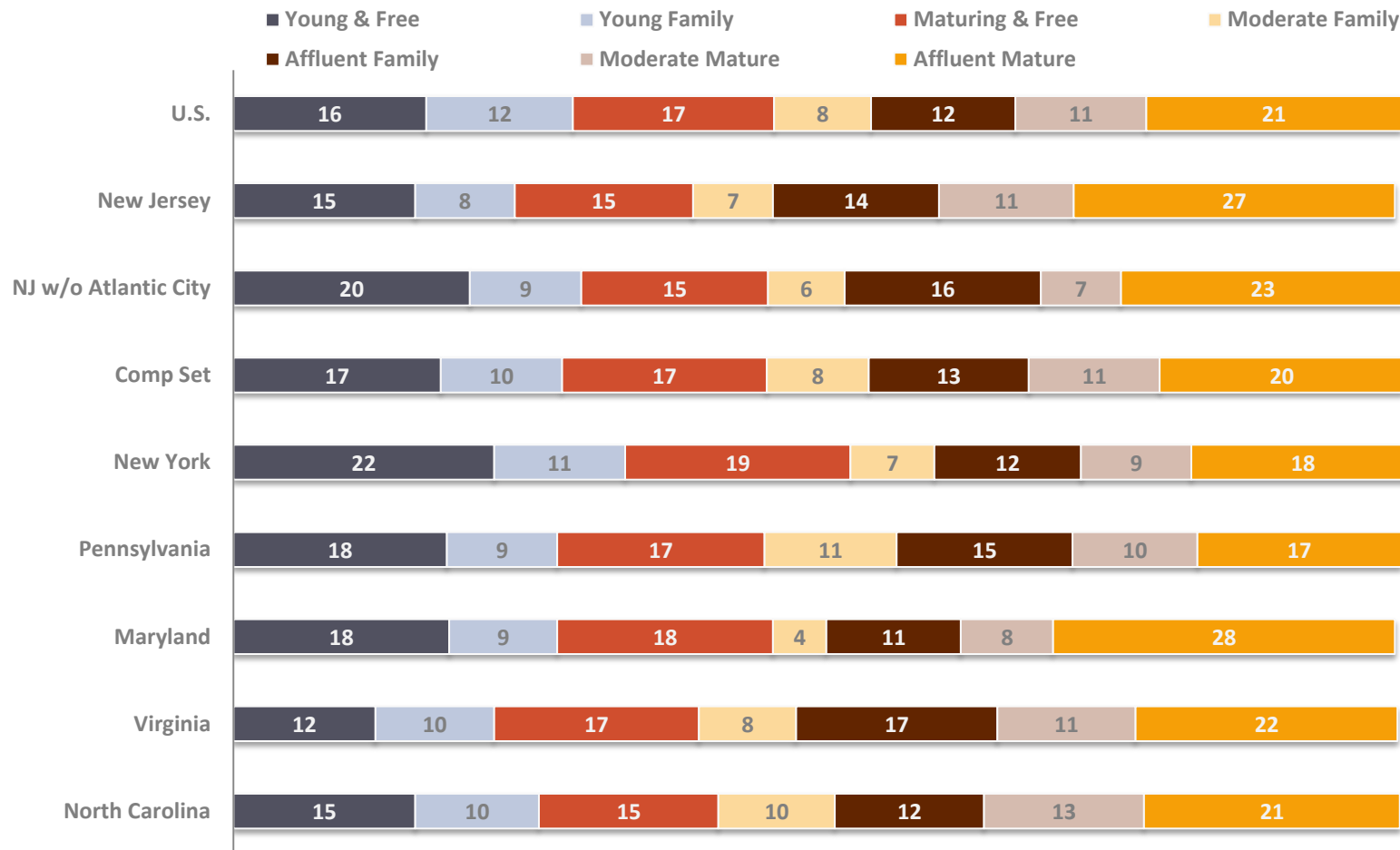


Chart 17 • Segment: 2015 Overnight Leisure Person-Stay (%) • New Jersey N = 1,056 household count

New Jersey Avg. Party per Stay Spending by Lifestage

DEMOGRAPHICS

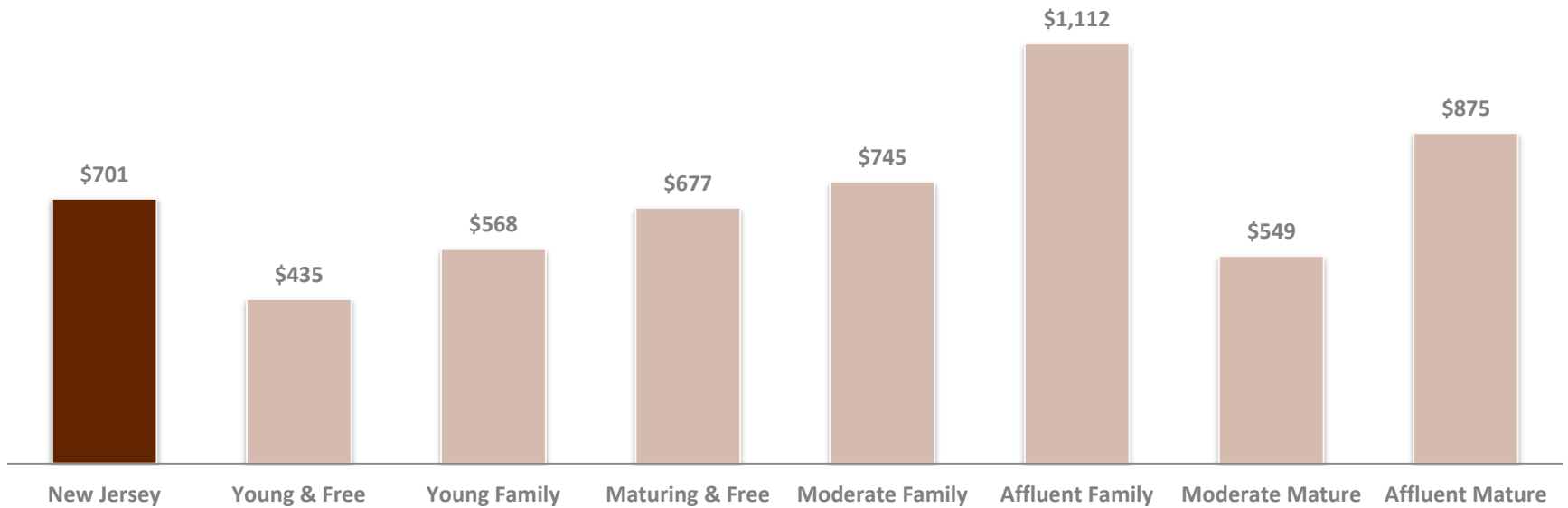


Chart 18 • Segment: 2013-2015 Overnight Leisure Stays (\$) • New Jersey N = 3,864 household count

New Jersey Lifestage Comparison

DEMOGRAPHICS

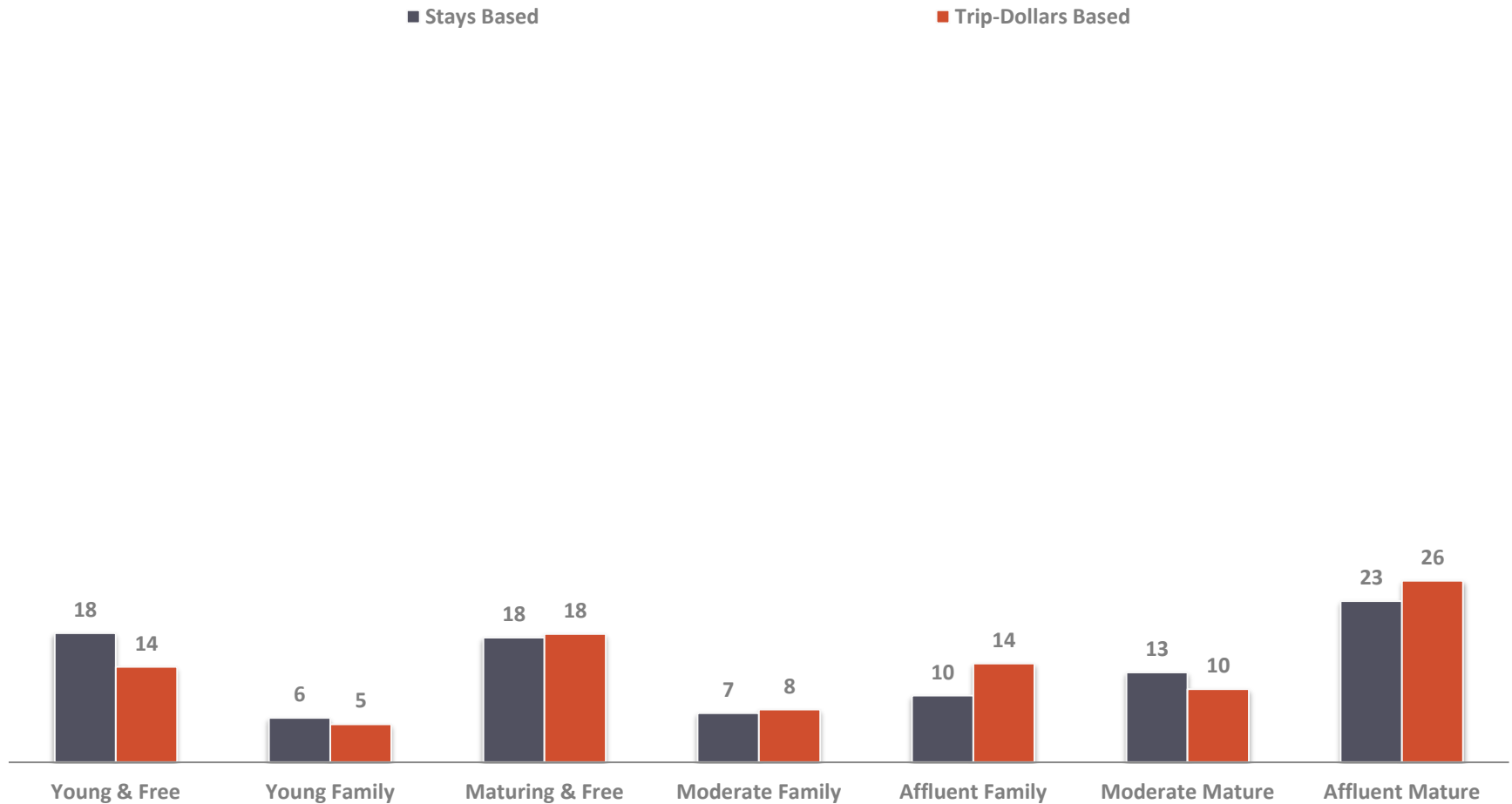


Chart 19 • Segment: 2013-2015 Overnight Leisure (%) • New Jersey N = 4,125 household count

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

DEMOGRAPHICS

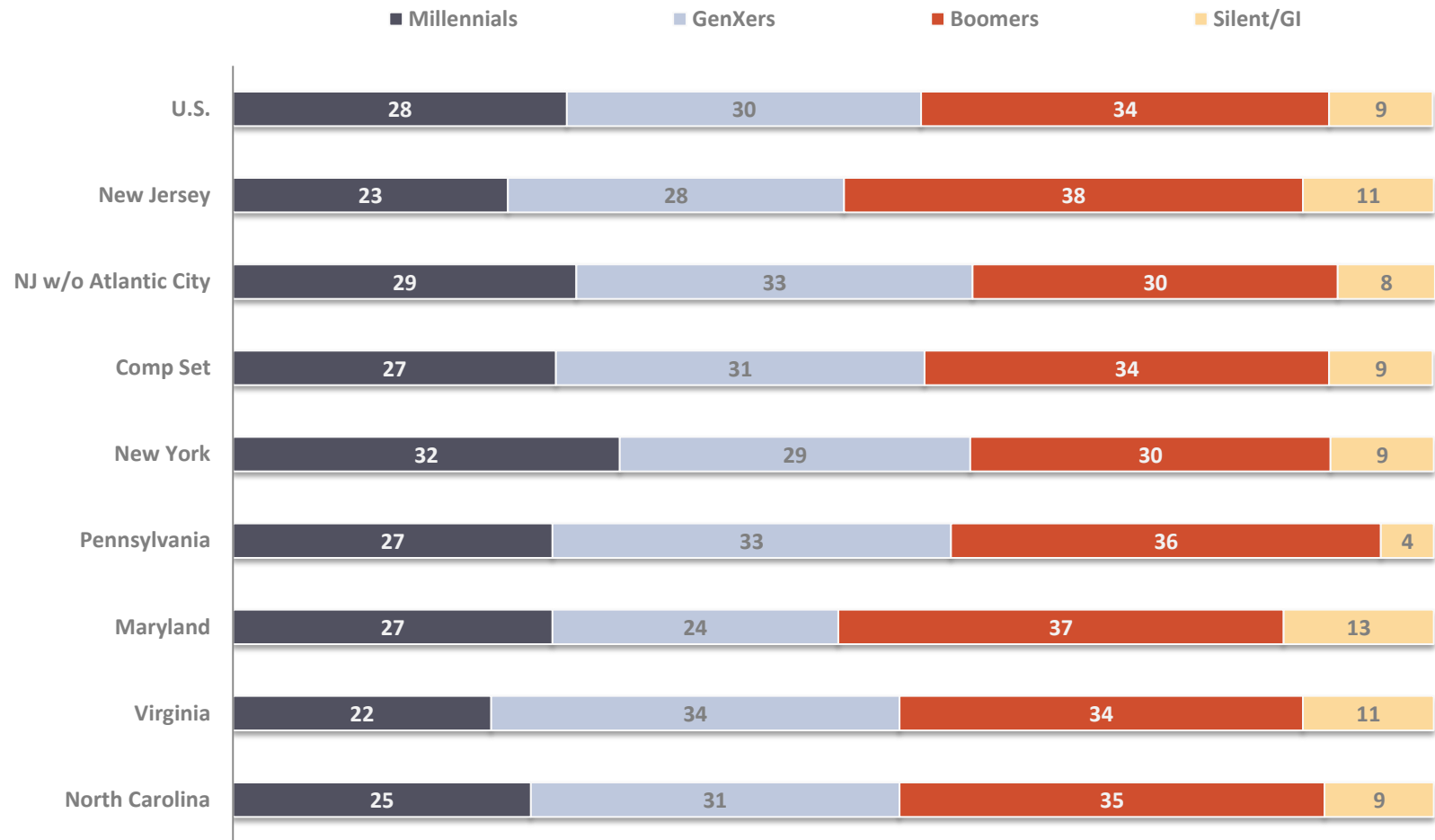


Chart 20 • Segment: 2015 Overnight Leisure Person-Stays (%) • New Jersey N = 1,056 household count

New Jersey Avg. Party per Stay Spending by Generation

DEMOGRAPHICS

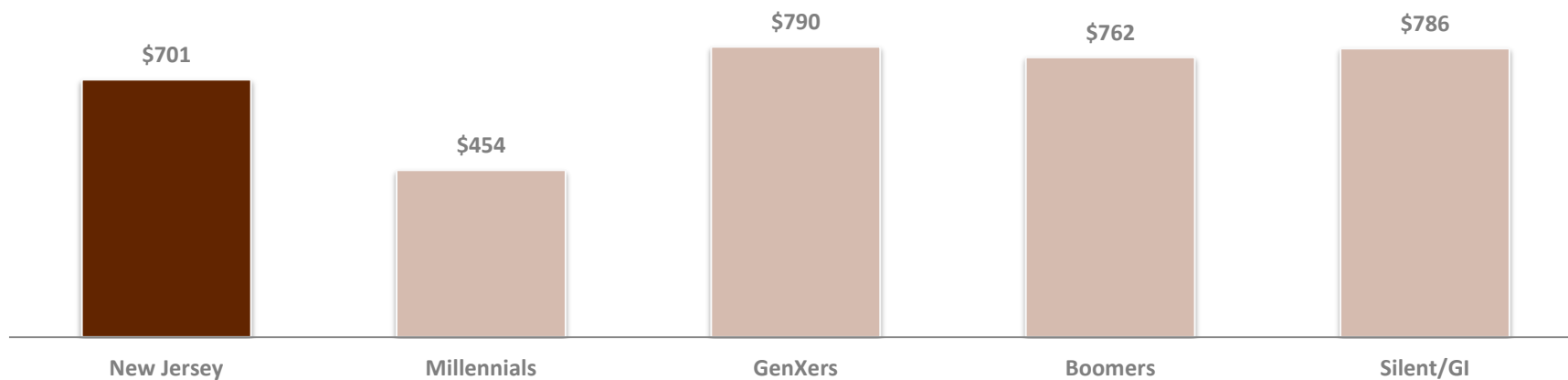


Chart 21 • Segment: 2013-2015 Overnight Leisure Stays (\$) • New Jersey N = 3,864 household count

New Jersey Traveler Generation Comparison

DEMOGRAPHICS

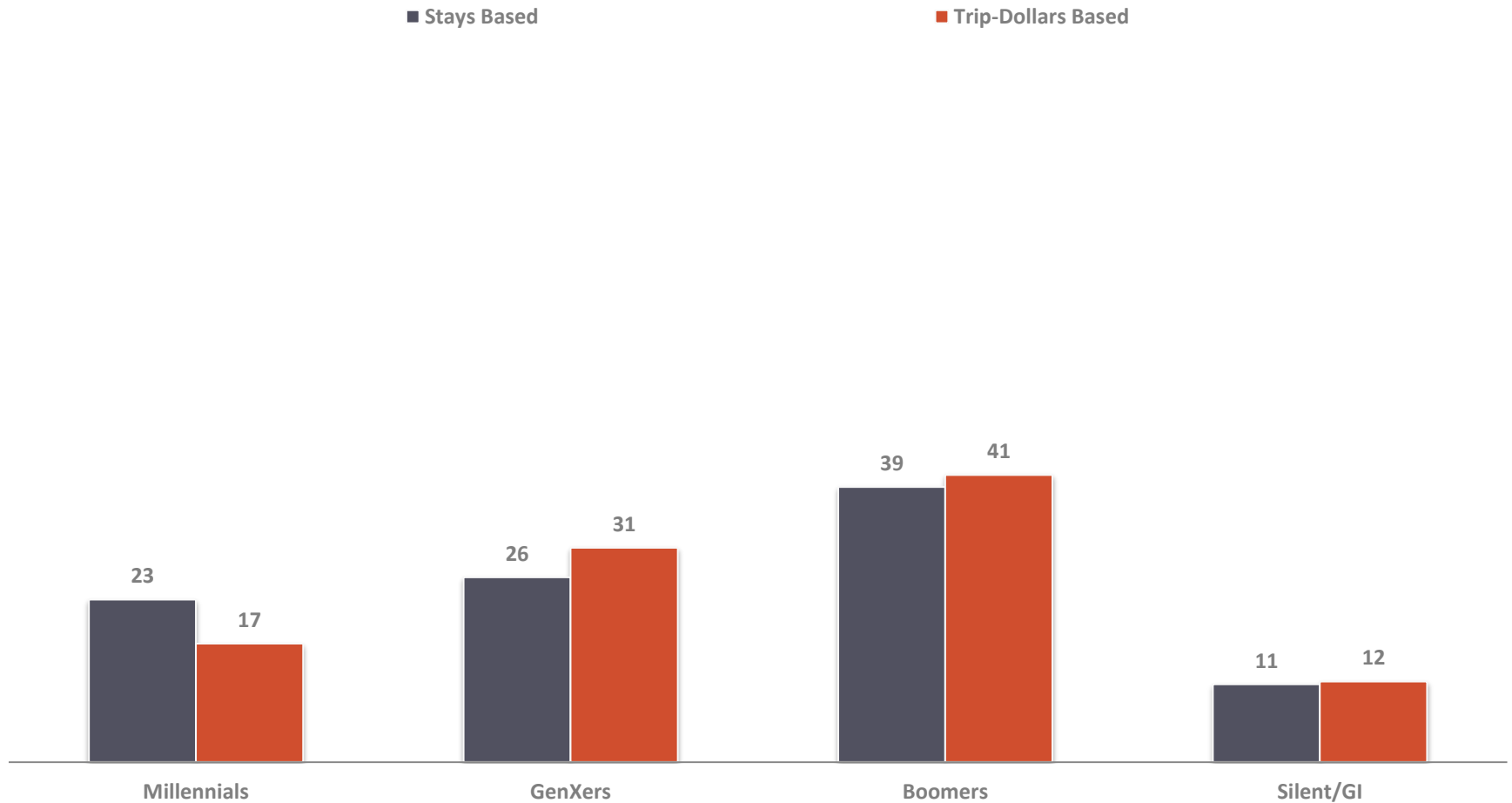


Chart 22 • Segment: 2013-2015 Overnight Leisure (%) • New Jersey N = 4,125 household count

Origin Divisions for Travel to New Jersey

TRIP ORIGIN

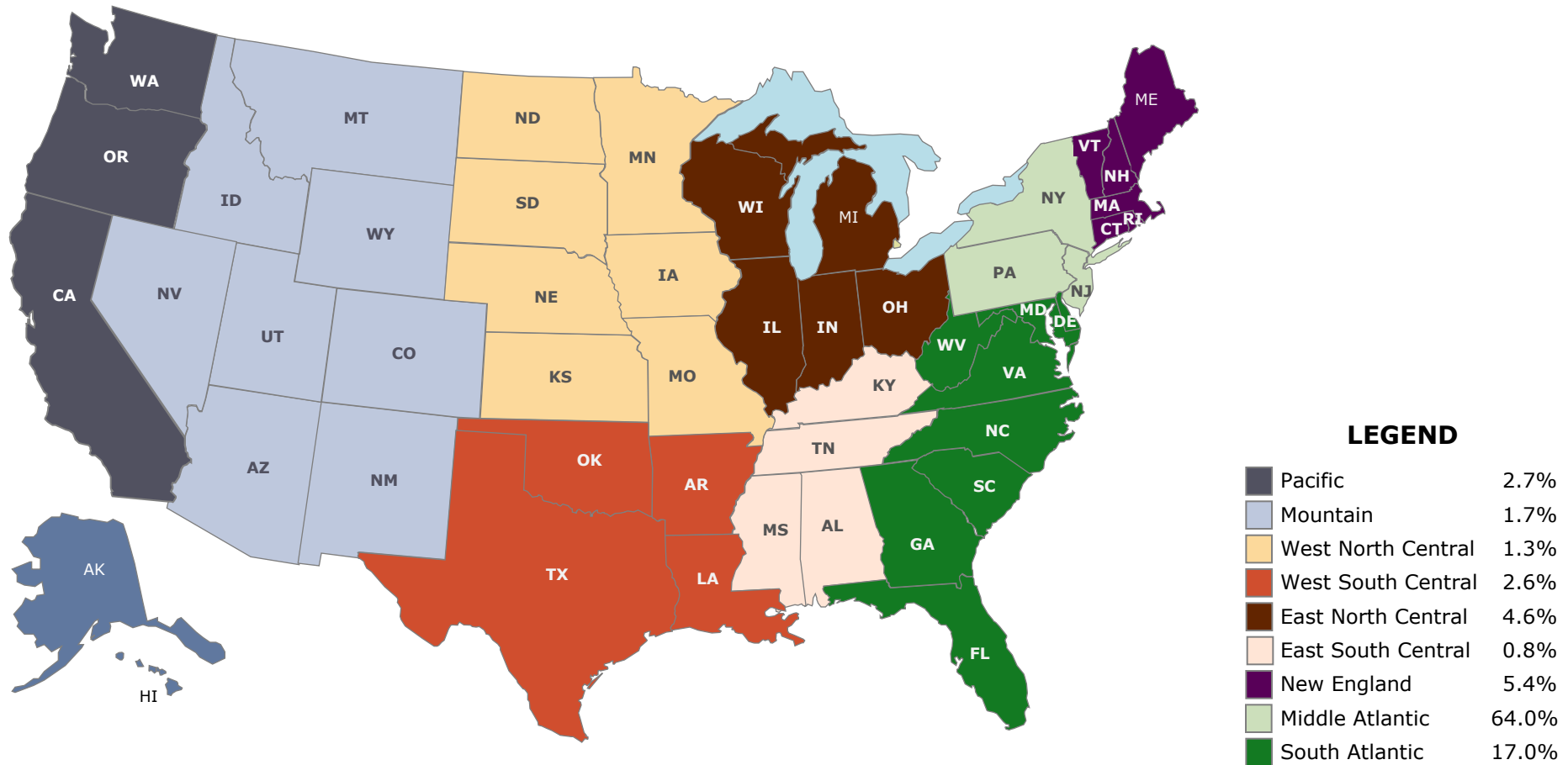


Chart 23 • Segment: 2015 Overnight Leisure Person-Stays (%) • New Jersey N = 1,056 household count

Top Origin States to New Jersey

TRIP ORIGIN

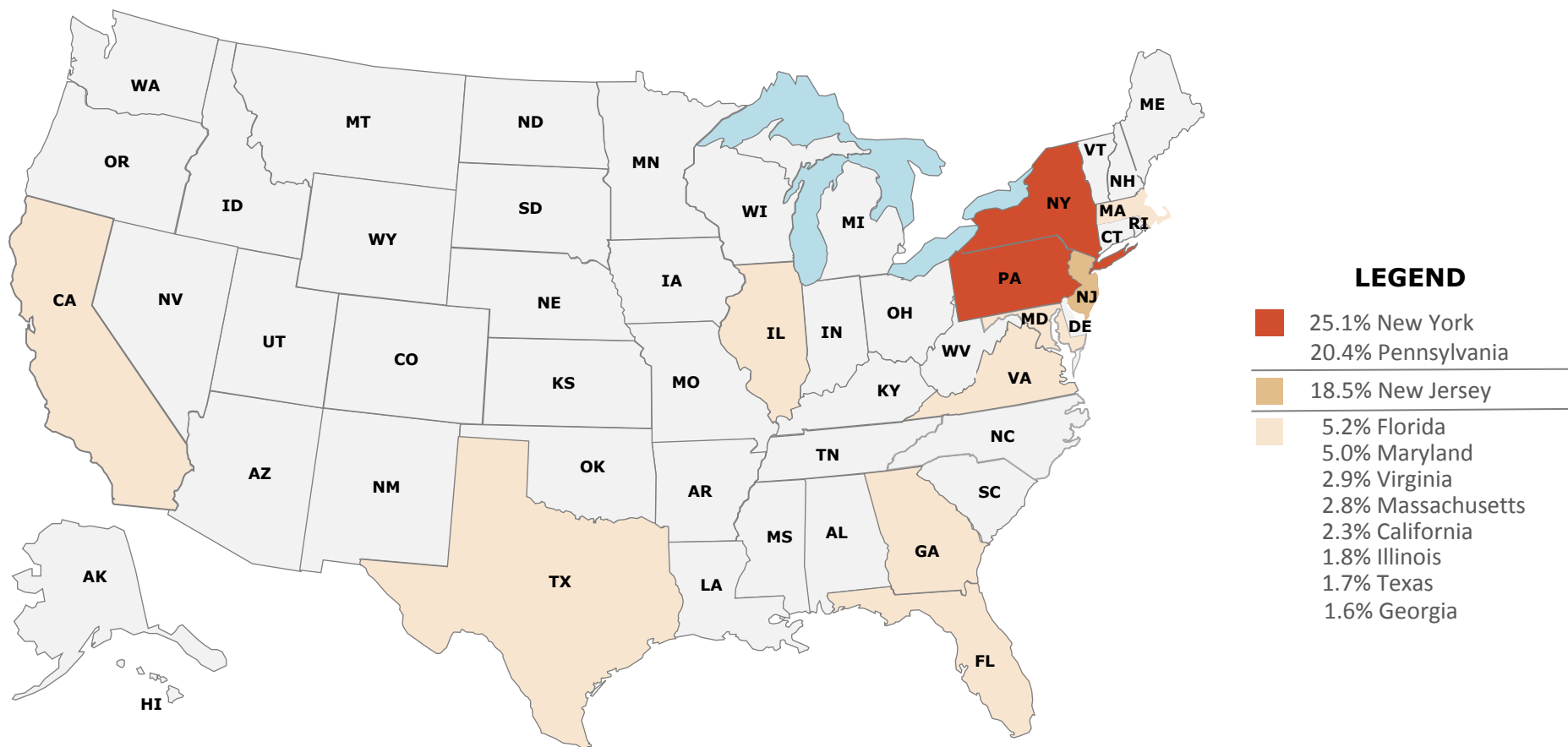


Chart 24 • Segment: 2015 Overnight Leisure Person-Stays (%) • New Jersey N = 1,056 household count

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	6%	36.5%	28.5%	17.2%	17.9%	18.3%	8.4%	5.3%
Philadelphia, PA	2.1%	15.1%	14.4%	3.8%	13.1%	9.1%	3.8%	1.1%
Baltimore, MD	1.2%	4.5%	2.8%	2.5%	3%	10.8%	4.6%	1.3%
Harrisburg-Lancaster-Lebanon-York, PA	0.7%	4.4%	6.4%	1.9%	4.9%	4.6%	1.2%	0.4%
Wilkes Barre-Scranton, PA	0.5%	4.2%	5.3%	2.2%	2.3%	0.3%	1.2%	0.5%
Boston, MA (Manchester, NH)	1.9%	2.8%	3.5%	5.3%	1.7%	1.9%	1.6%	0.8%
Washington, DC (Hagerstown, MD)	2.3%	2.6%	2.3%	3.5%	6%	14.9%	16.3%	5.8%
Tampa-St. Petersburg (Sarasota), FL	1.6%	2.3%	3.4%	1.2%	0.7%	0.9%	0.6%	1.7%
Albany-Schenectady-Troy, NY	0.6%	1.7%	0.6%	5.5%	0.2%	0.6%	0.8%	0%
Atlanta, GA	2.3%	1.6%	2.2%	1.2%	0.6%	2.6%	2.4%	5%
Top 10 Sum	19.2%	75.7%	69.4%	44.3%	50.4%	64%	40.9%	21.9%

Chart 25 • Segment: 2015 Overnight Leisure Person-Stays (%) • New Jersey N = 1,056 household count

New Jersey Avg. Party per Stay Spending by Origin DMA

TRIP ORIGIN

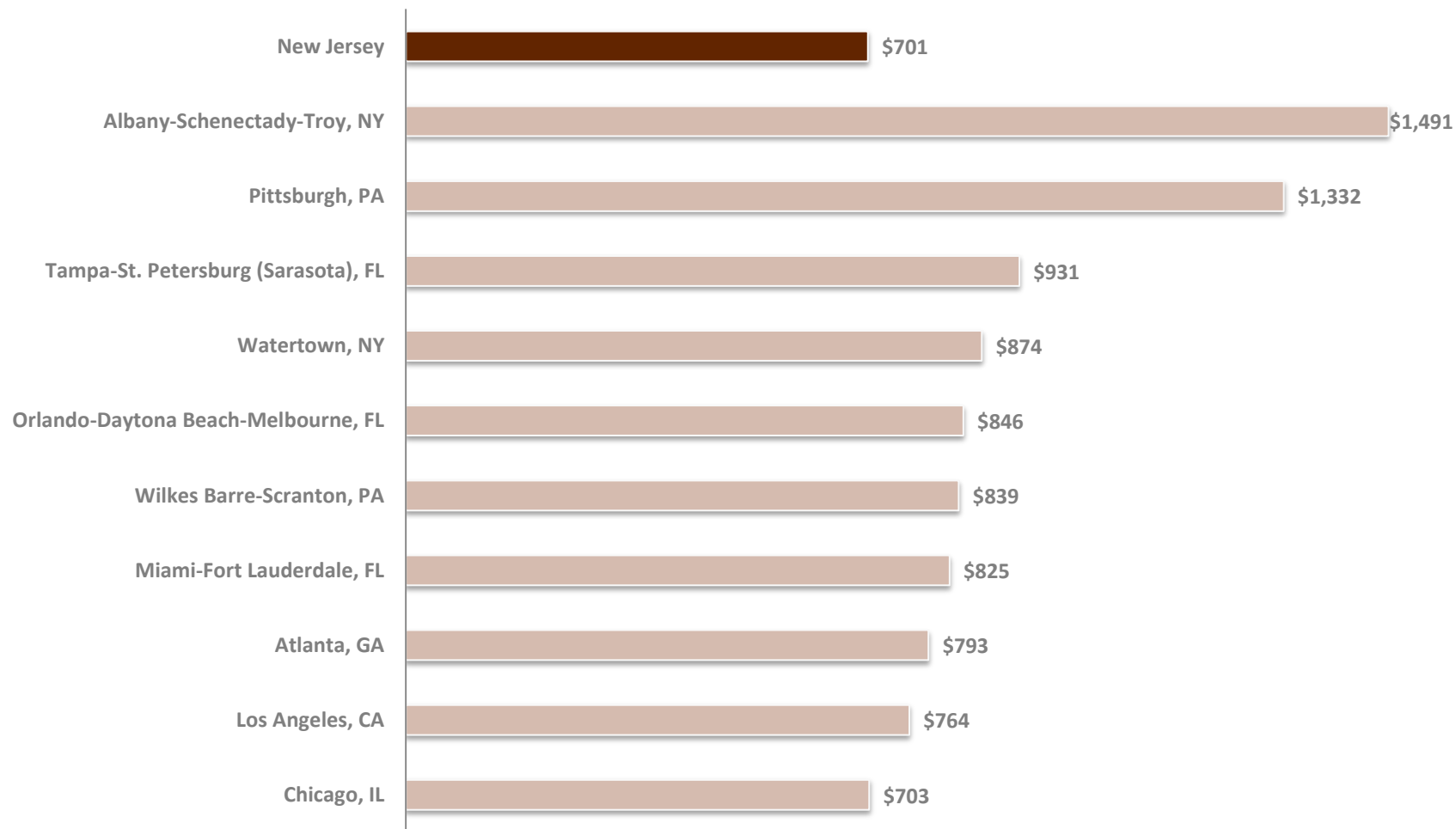


Chart 26 • Segment: 2013-2015 Overnight Leisure Stays (\$) • New Jersey N = 3,768 household count

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

TRIP ORIGIN

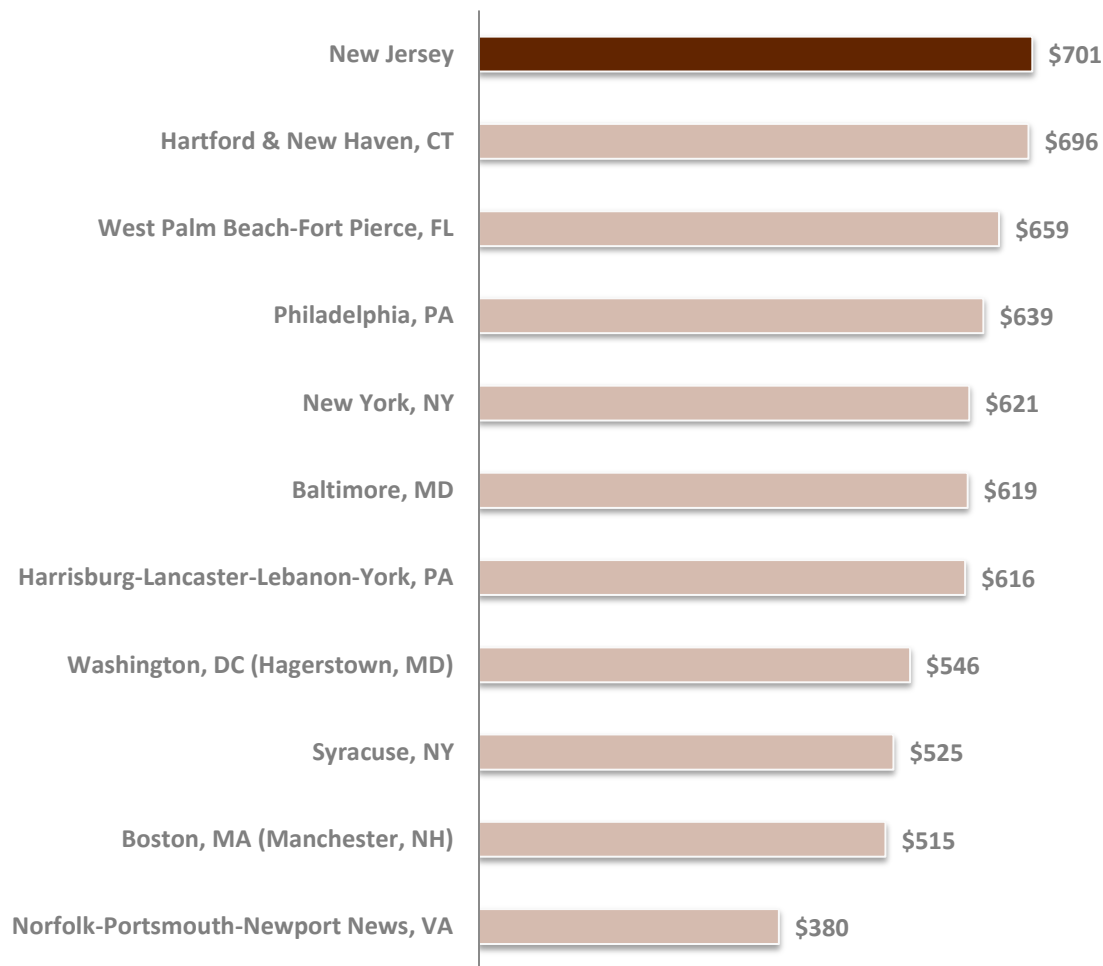


Chart 26 • Segment: 2013-2015 Overnight Leisure Stays (\$) • New Jersey N = 3,768 household count

New Jersey Origin DMA Comparison

TRIP ORIGIN

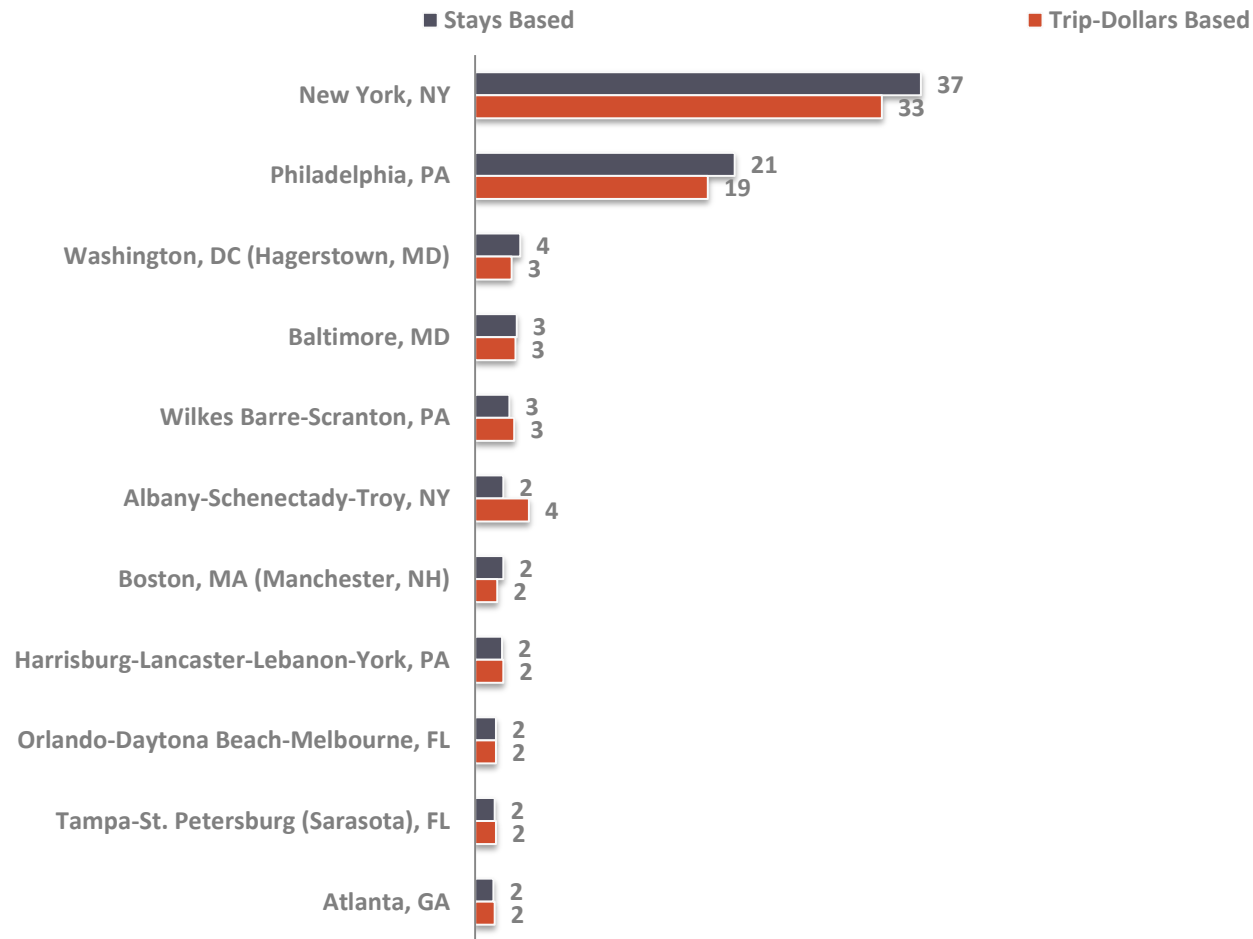


Chart 27 • Segment: 2013-2015 Overnight Leisure (%) • New Jersey N = 4,016 household count

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

TRANSPORTATION

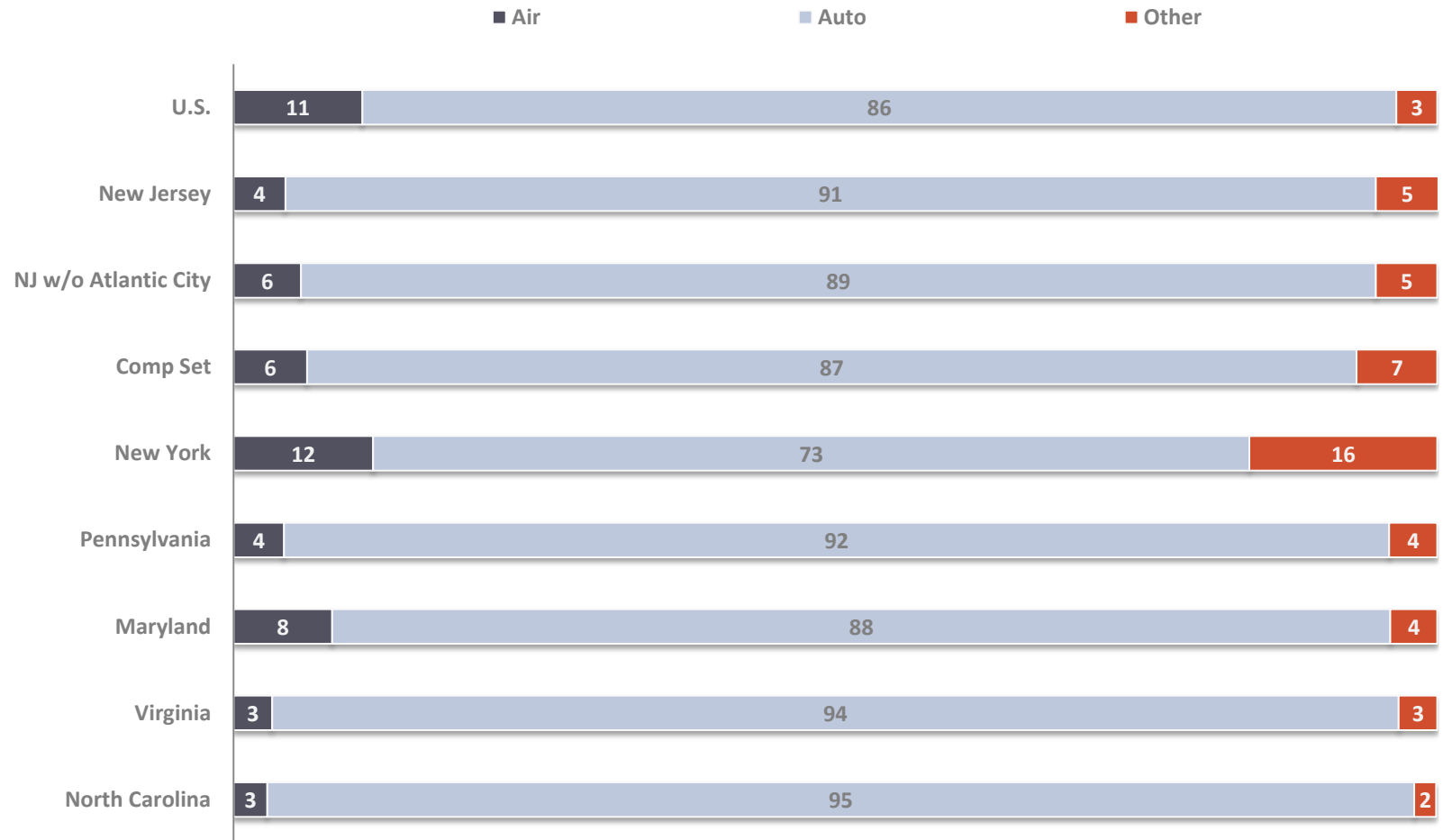


Chart 28 • Segment: 2015 Overnight Leisure Person-Stays (%) • New Jersey N = 1,056 household count

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

TRANSPORTATION

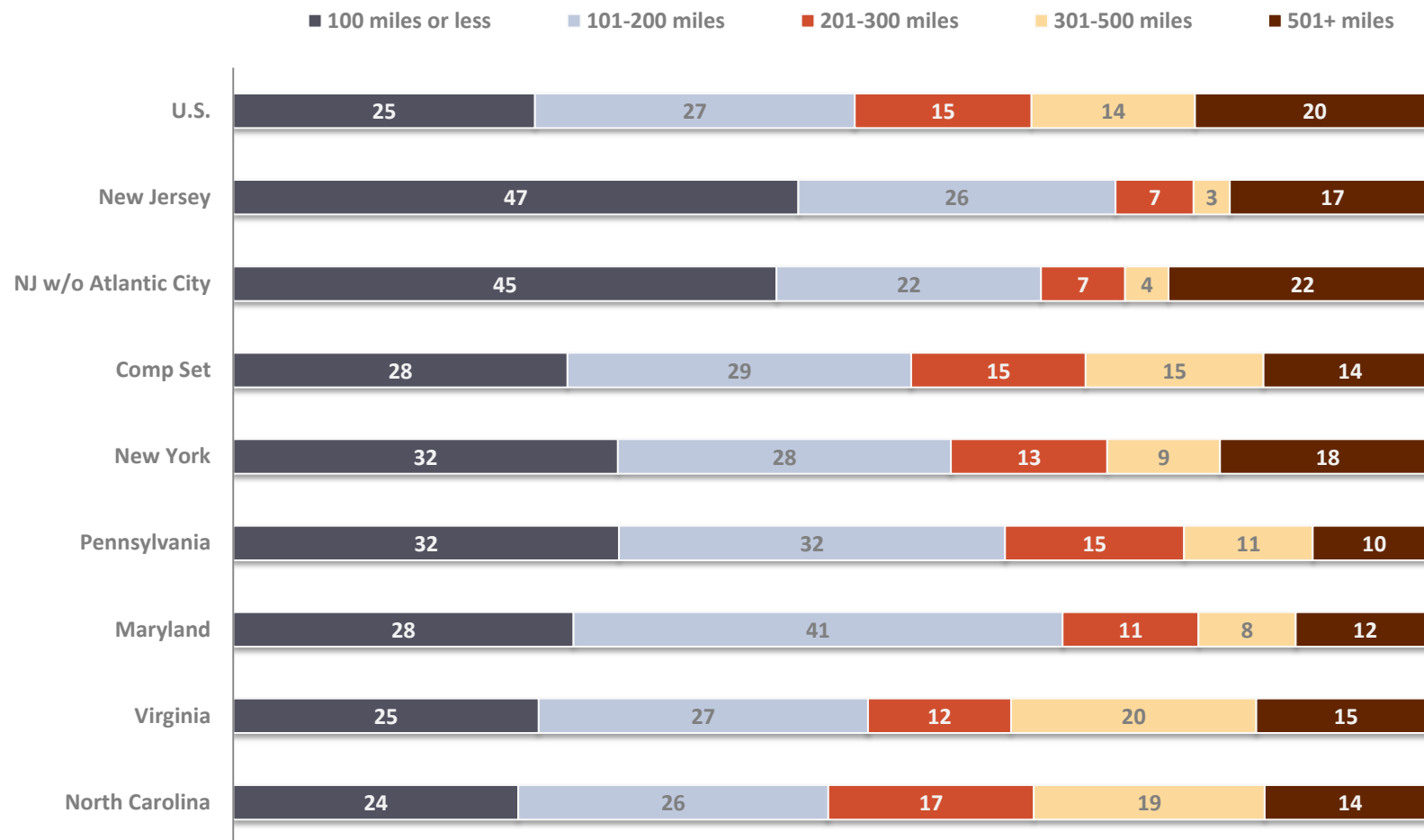


Chart 29 • Segment: 2015 Overnight Leisure Person-Stays (%) • New Jersey N = 783 household count

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

TRANSPORTATION

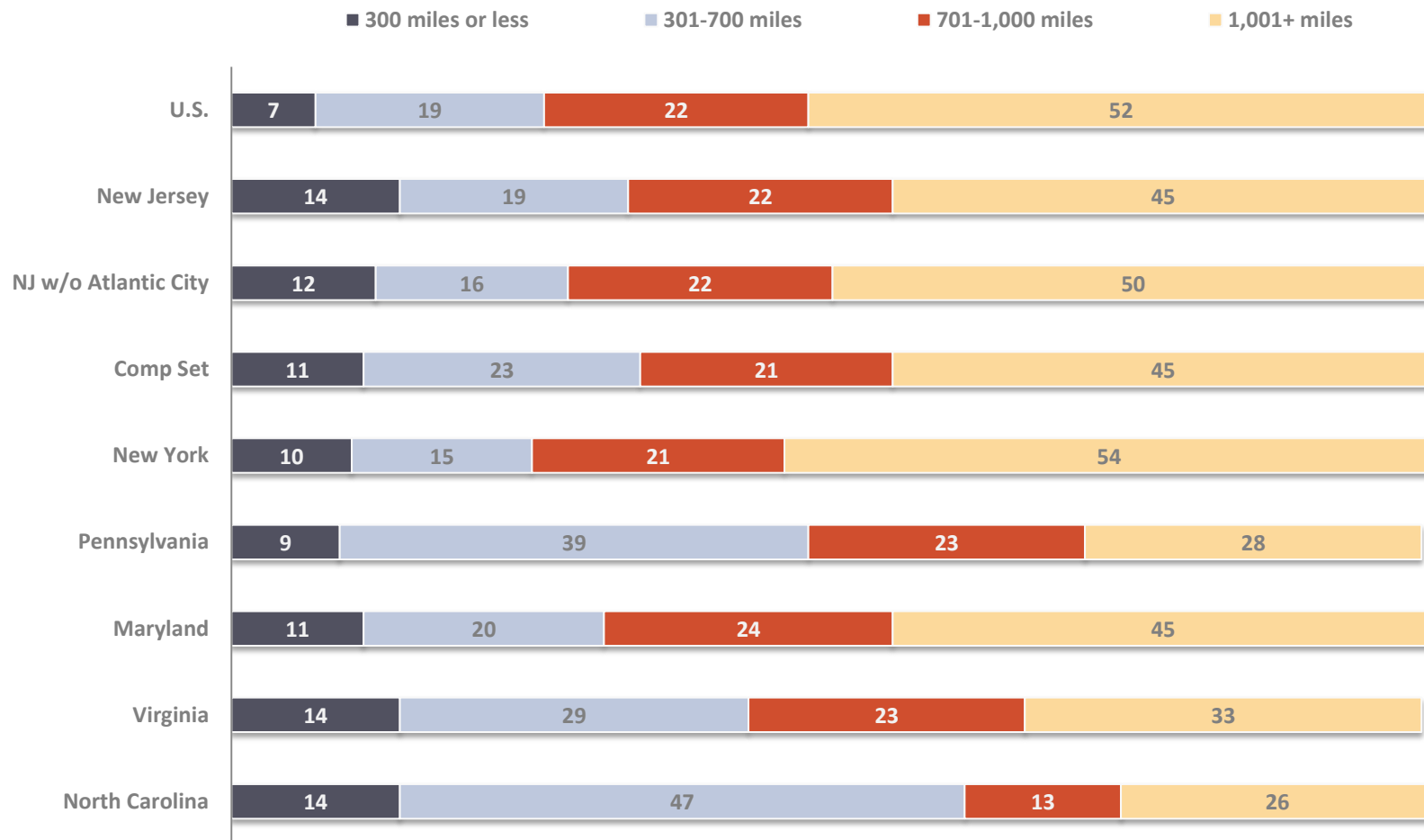


Chart 30 • Segment: 2015 Overnight Leisure Person-Stays (%) • New Jersey N = 124 household count

New Jersey Month Trip Started

TRIP TIMING

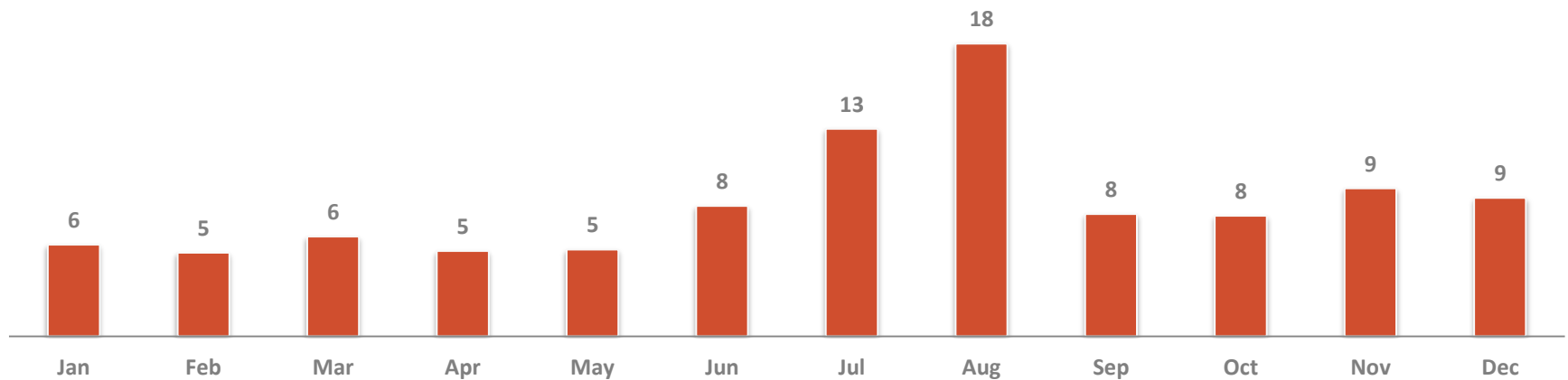


Chart 31 • Segment: 2015 Overnight Leisure Person-Stays (%) • New Jersey N = 1,056 household count

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

TRIP TIMING

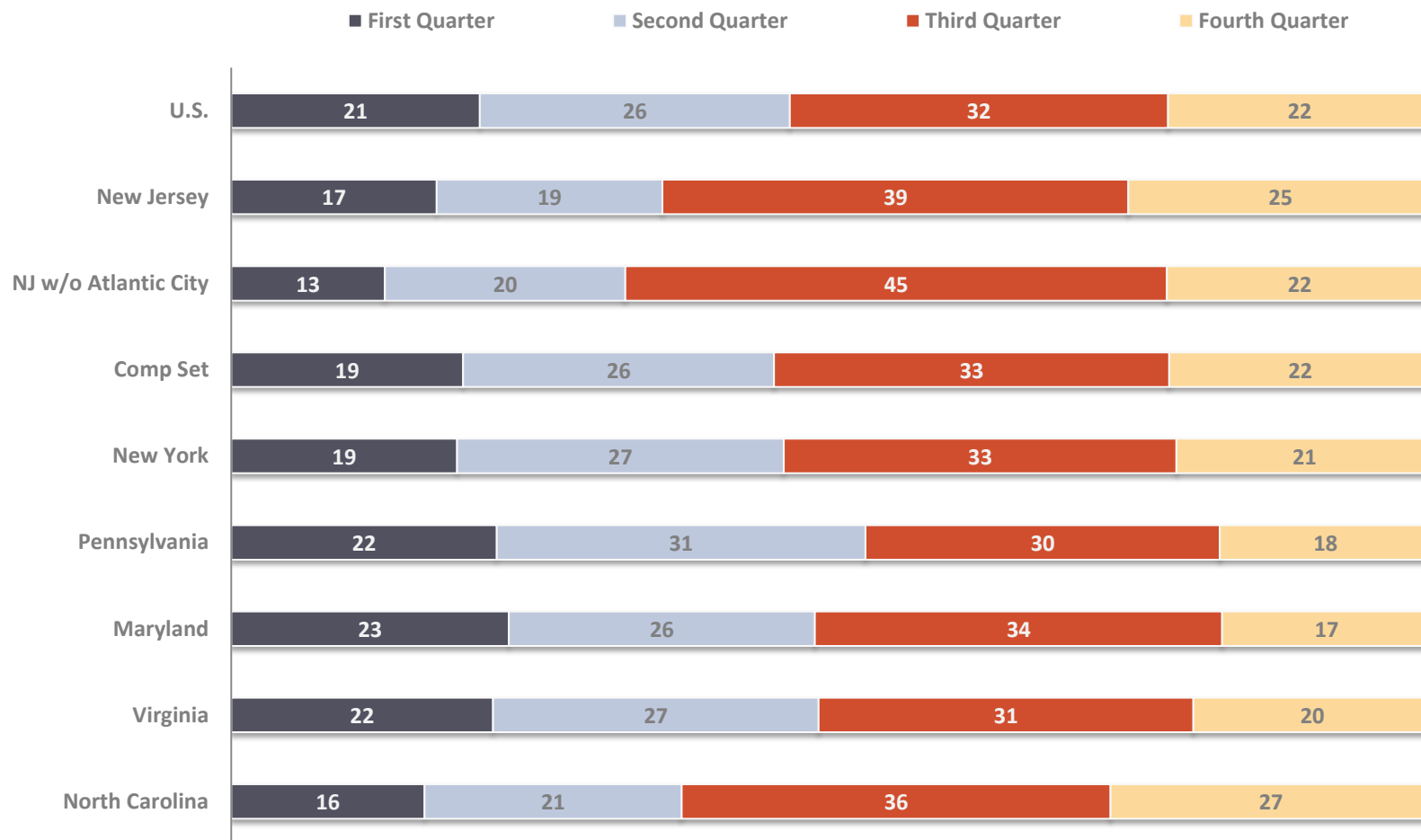


Chart 32 • Segment: 2015 Overnight Leisure Person-Stays (%) • New Jersey N = 1,056 household count

New Jersey Avg. Party per Stay Spending by Quarter

TRIP TIMING

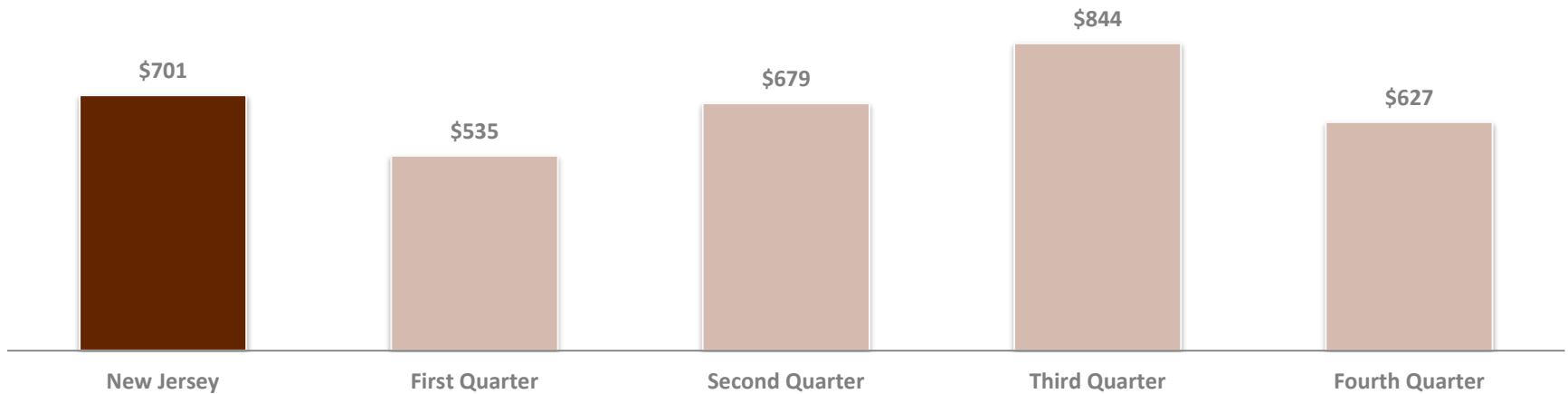


Chart 33 • Segment: 2013-2015 Overnight Leisure Stays (\$) • New Jersey N = 3,864 household count

New Jersey Trip Timing Comparison by Quarter

TRIP TIMING

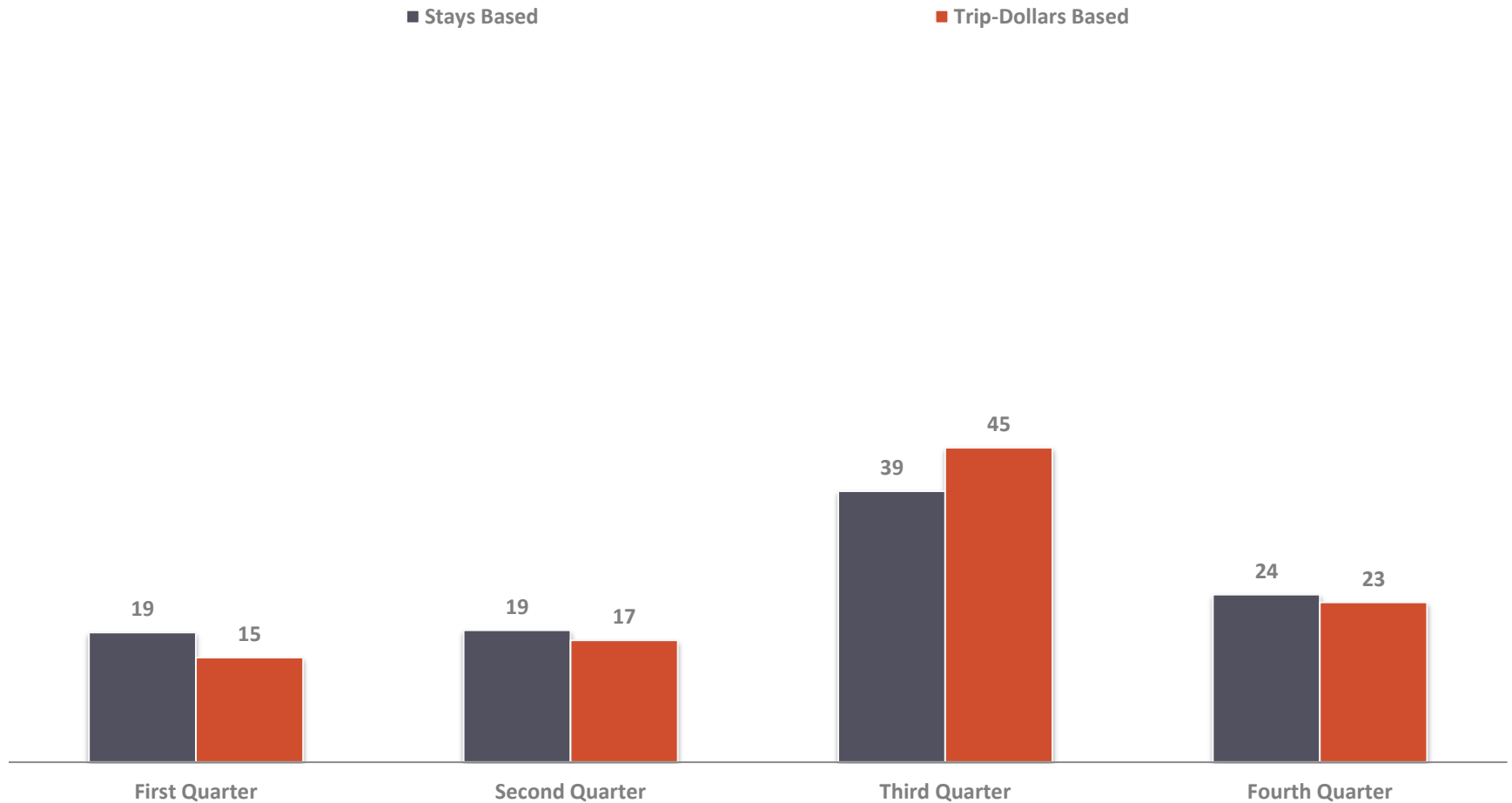


Chart 34 • Segment: 2013-2015 Overnight Leisure (%) • New Jersey N = 4,125 household count

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

TRIP TIMING

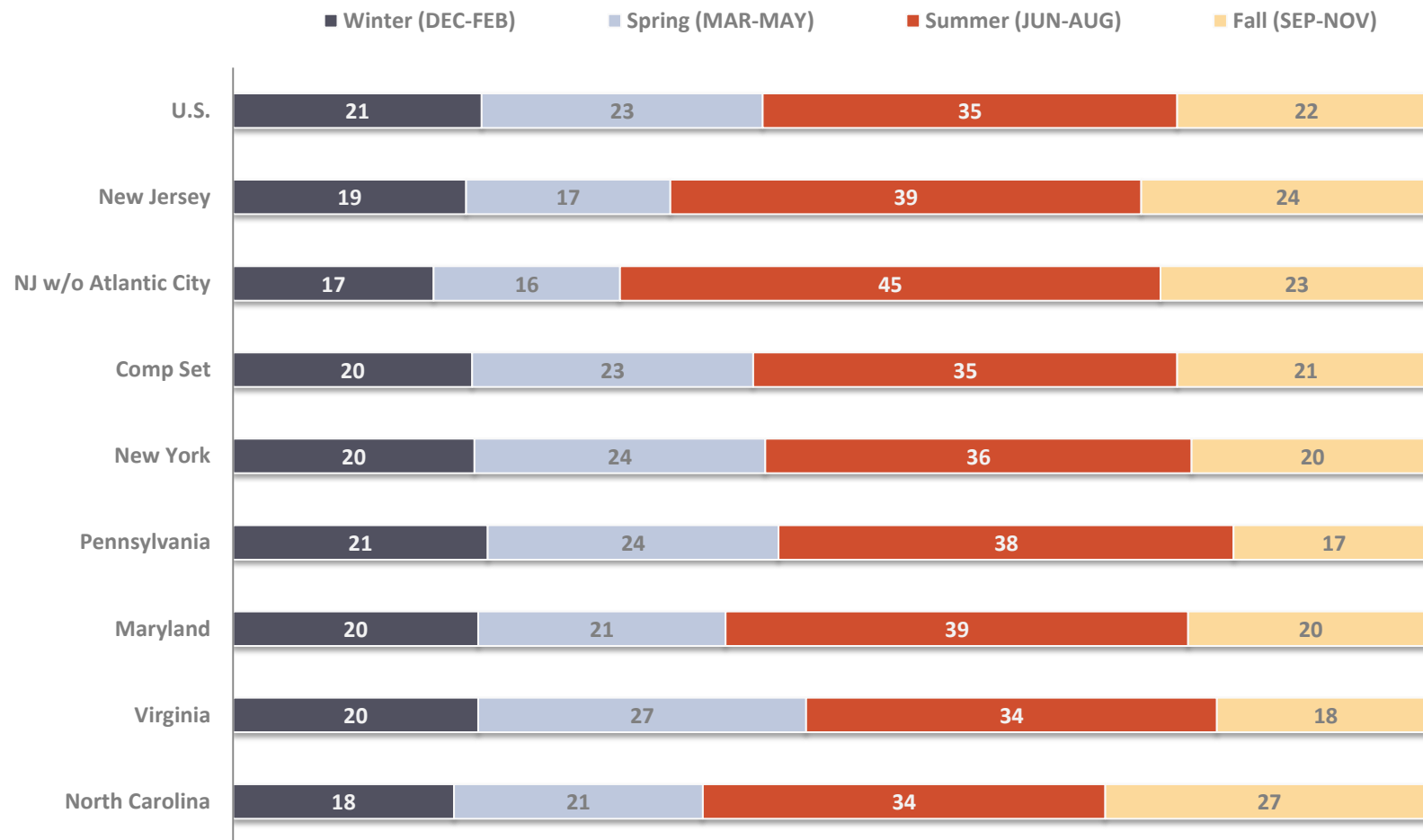


Chart 35 • Segment: 2015 Overnight Leisure Person-Stays (%) • New Jersey N = 1,056 household count

New Jersey Avg. Party per Stay Spending by Season

TRIP TIMING

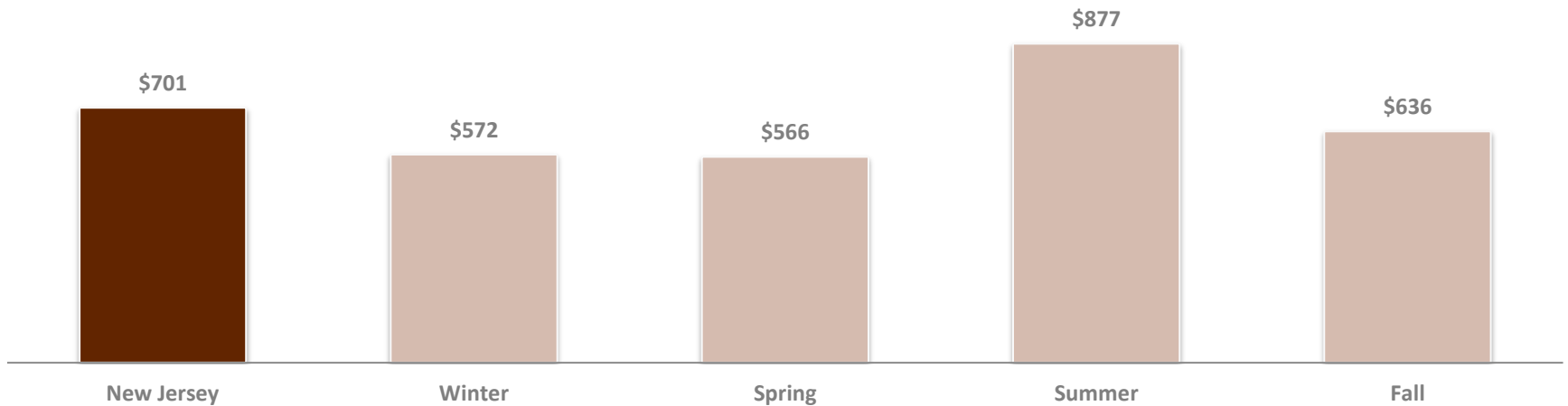


Chart 36 • Segment: 2013-2015 Overnight Leisure Stays (\$) • New Jersey N = 3,864 household count

New Jersey Trip Timing Comparison by Season

TRIP TIMING

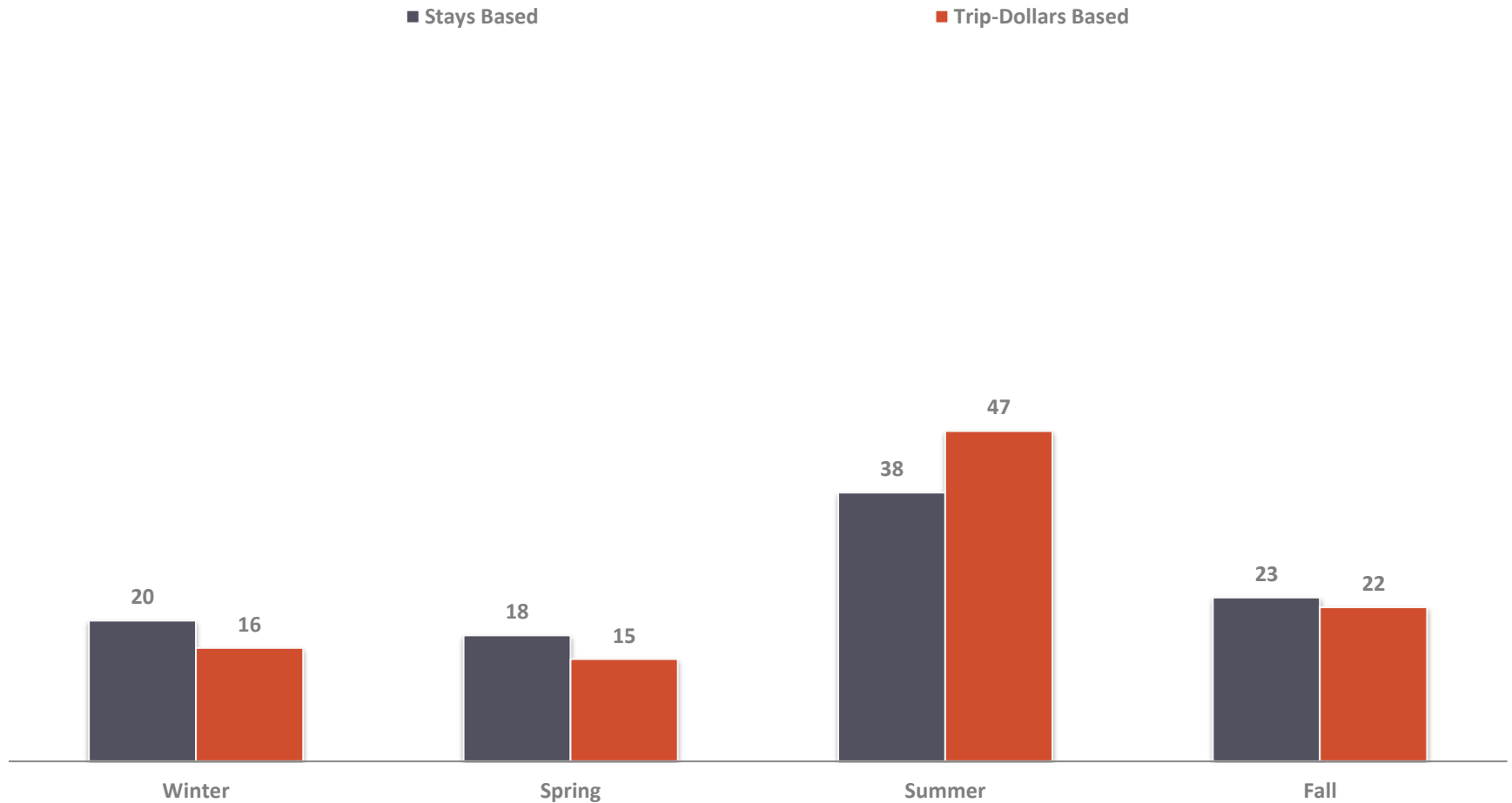


Chart 37 • Segment: 2013-2015 Overnight Leisure (%) • New Jersey N = 4,125 household count

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

TRIP CHARACTERISTICS

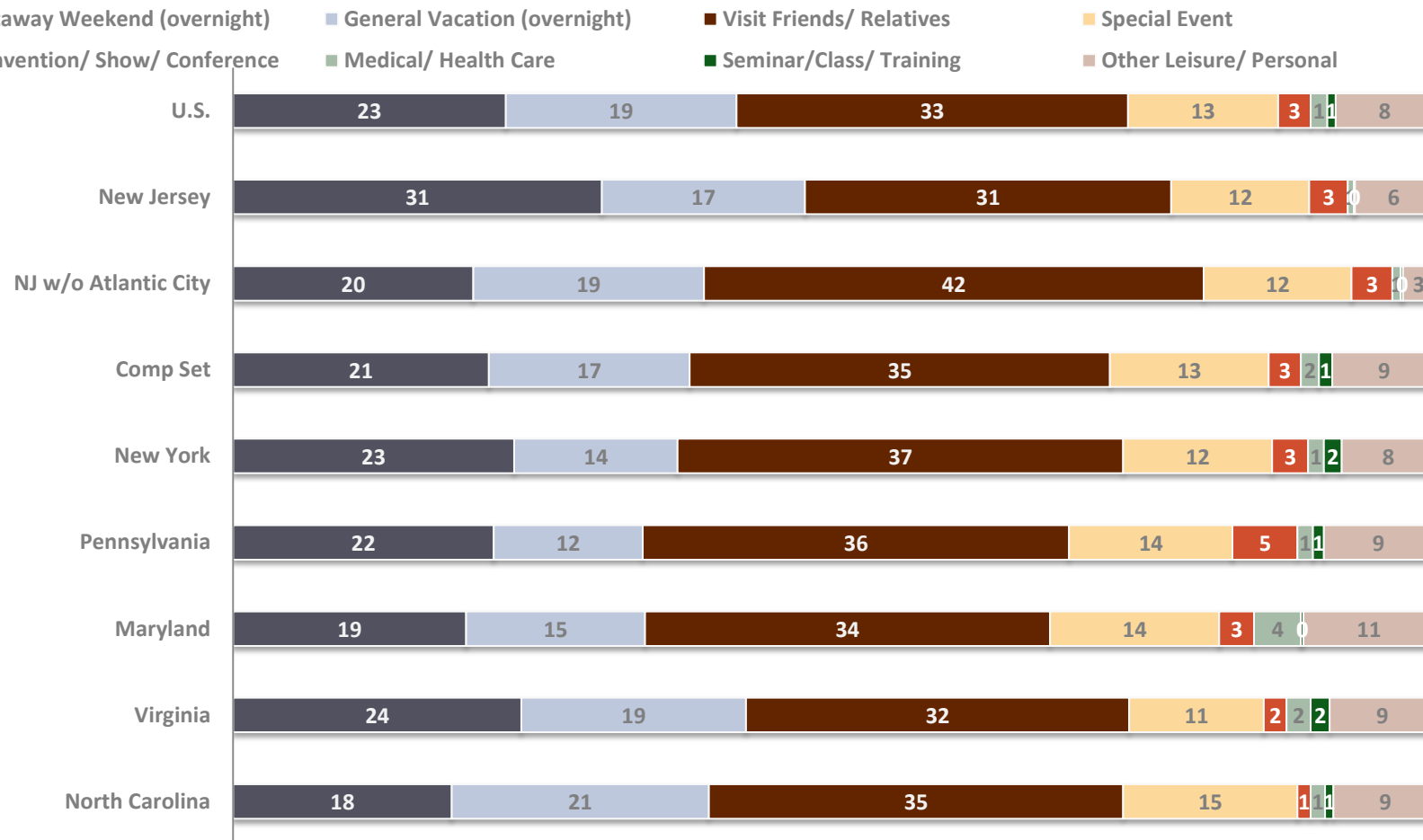


Chart 38 • Segment: 2015 Overnight Leisure Person-Stays (%) • New Jersey N = 1,056 household count

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

TRIP CHARACTERISTICS

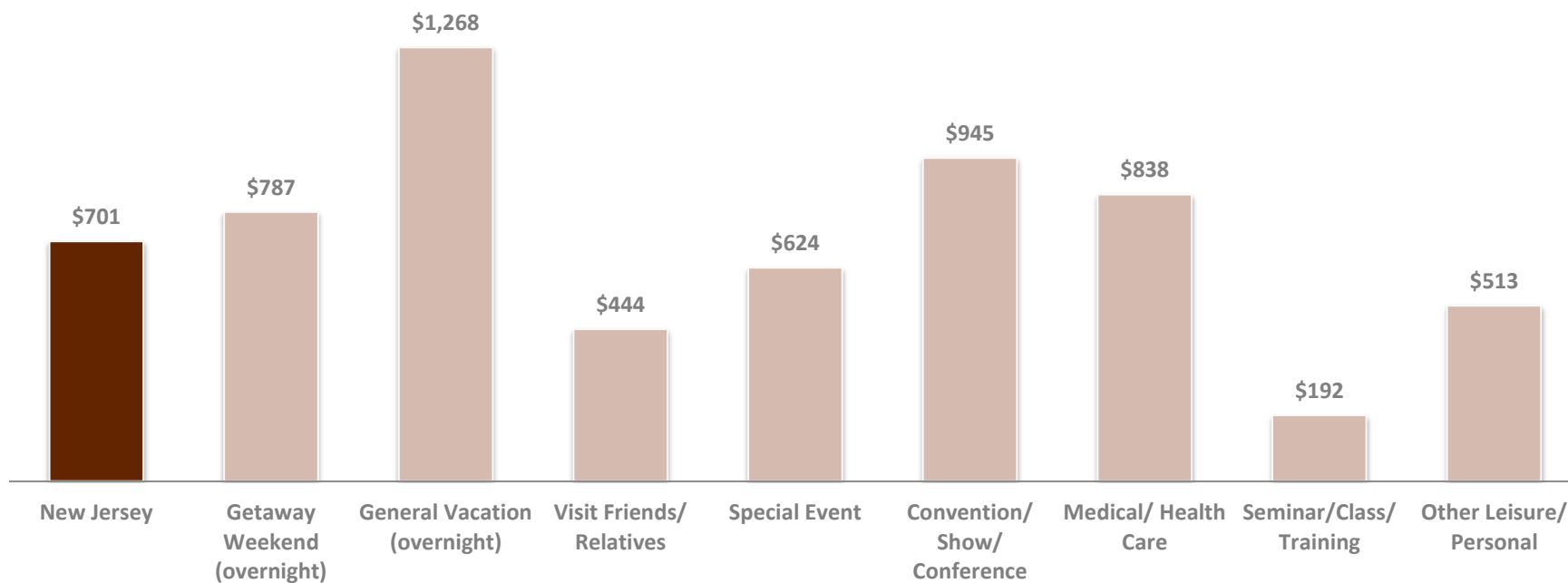


Chart 39 • Segment: 2013-2015 Overnight Leisure Stays (\$) • New Jersey N = 3,864 household count

New Jersey Purpose of Stay Comparison

TRIP CHARACTERISTICS

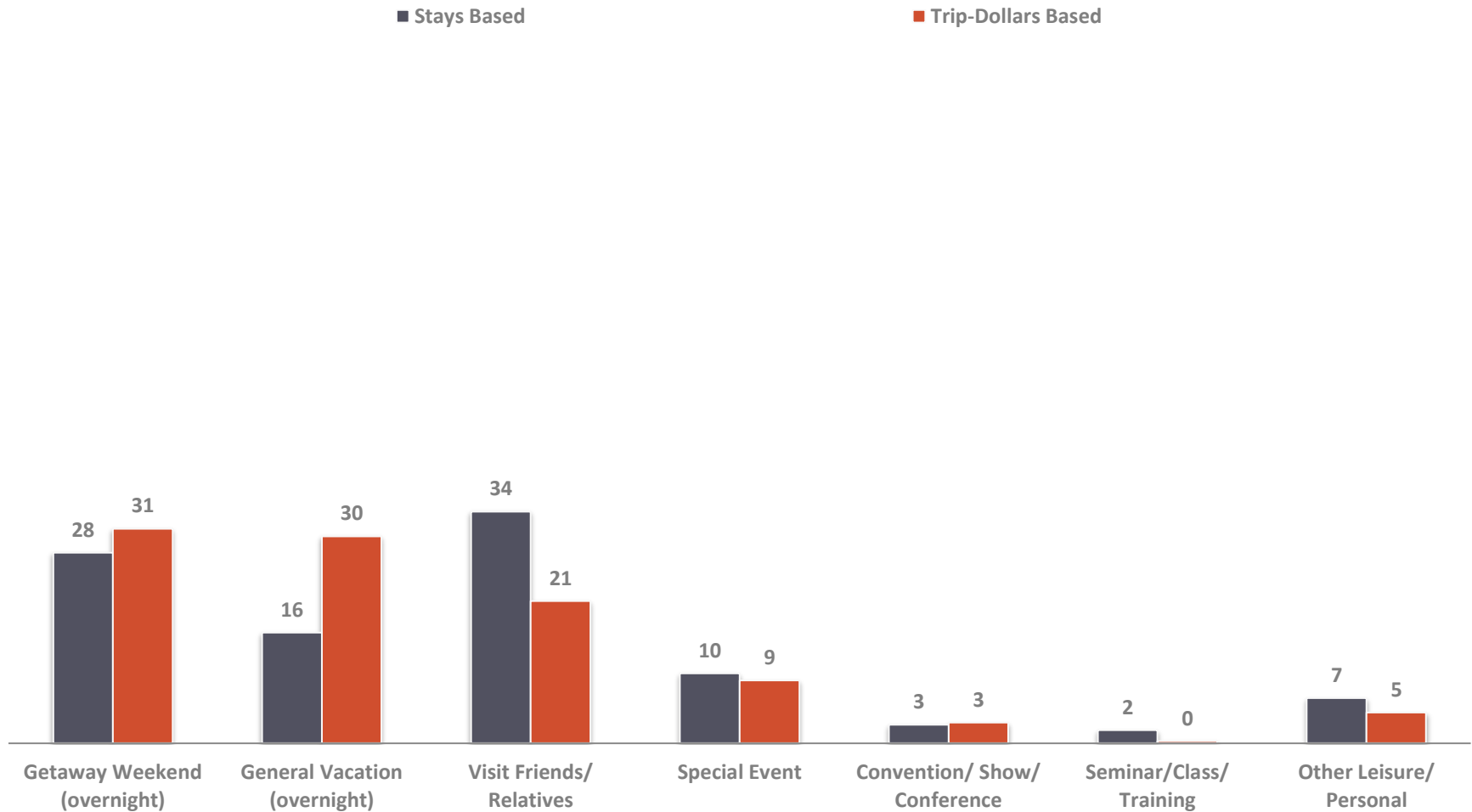


Chart 40 • Segment: 2013-2015 Overnight Leisure (%) • New Jersey N = 4,125 household count

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

TRIP CHARACTERISTICS

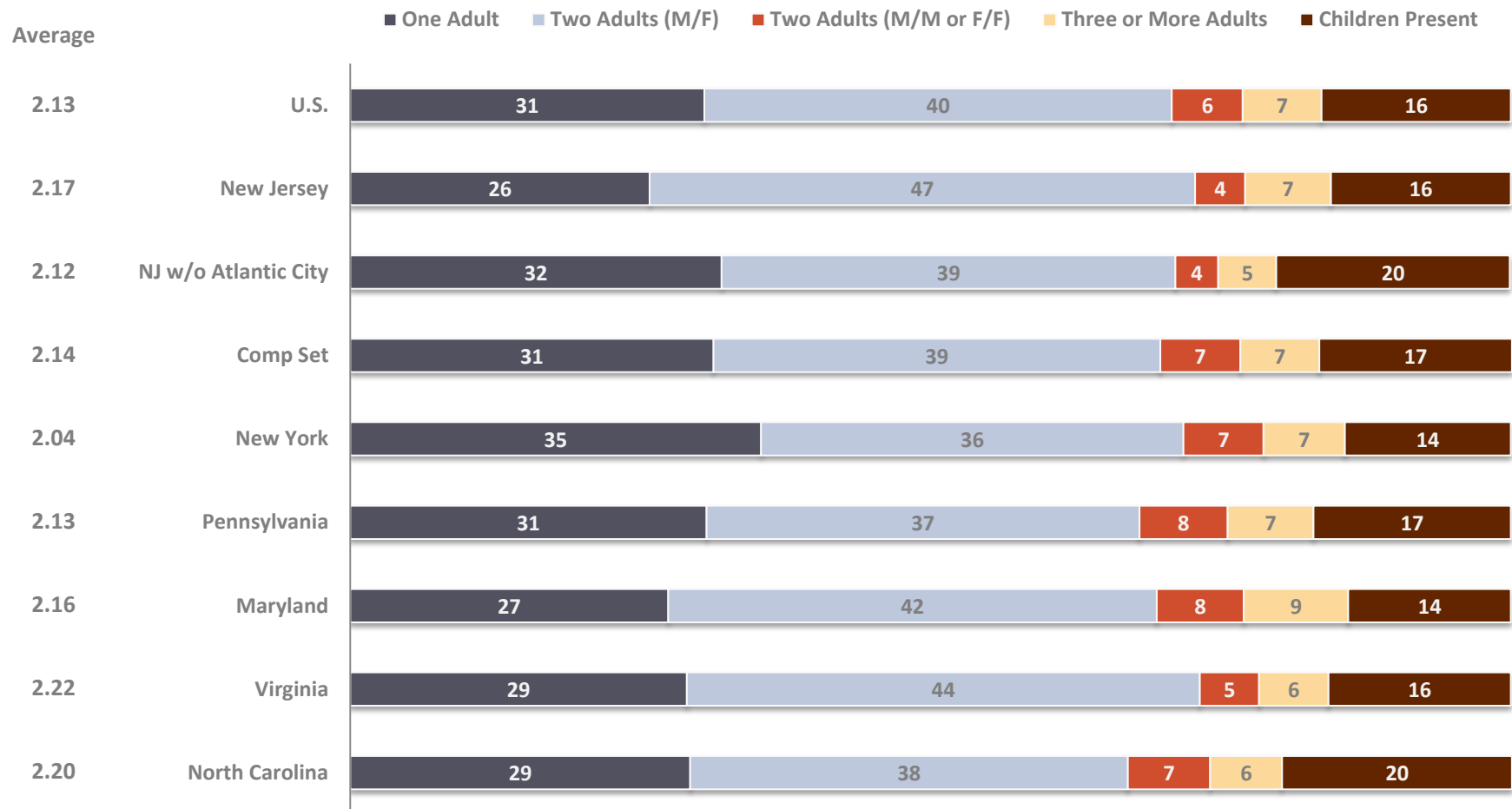


Chart 41 • Segment: 2015 Overnight Leisure Stays (%) • New Jersey N = 1,056 household count

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

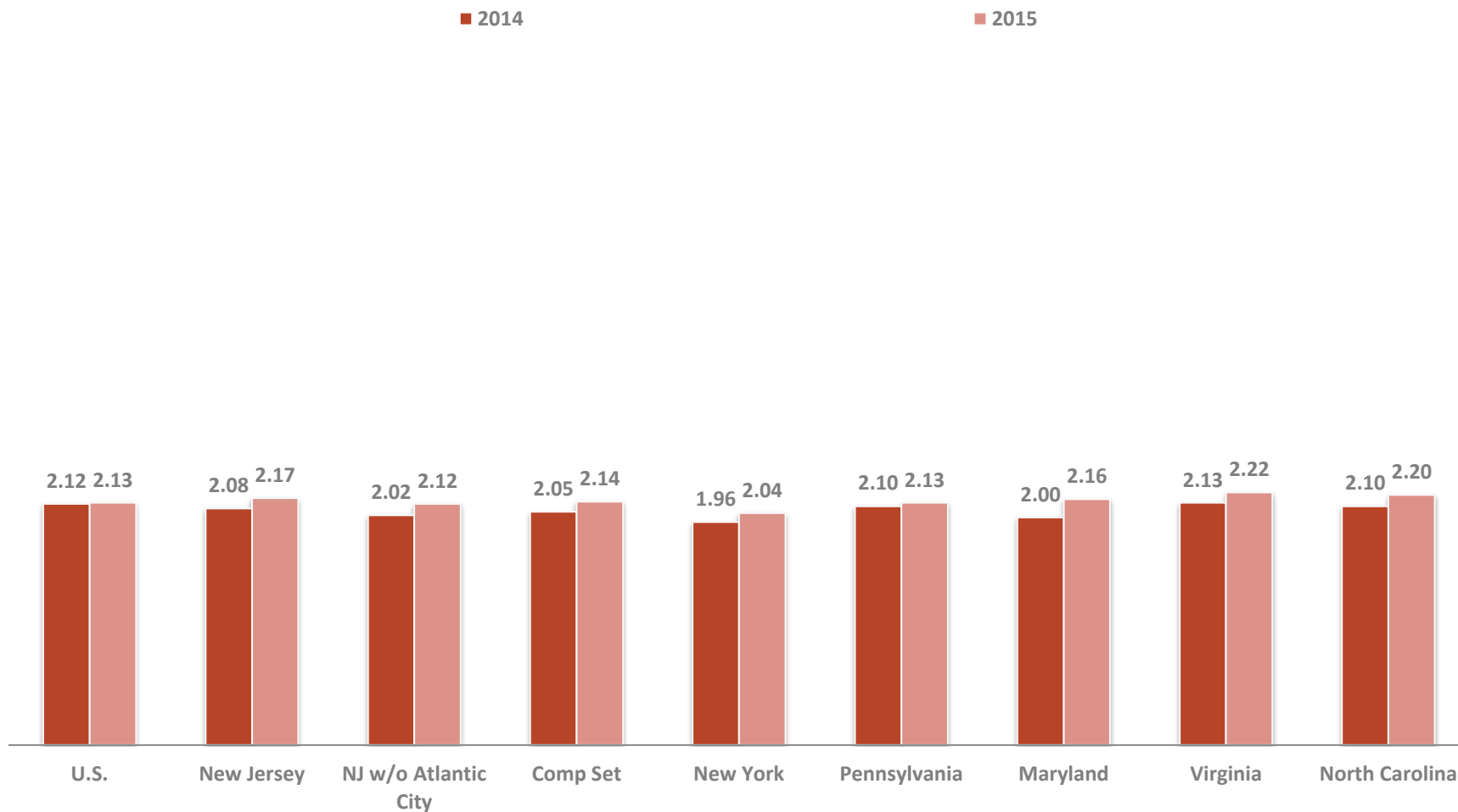


Chart 42 • Segment: 2014/2015 Overnight Leisure Stays • New Jersey N = 1,590/1,056 household count

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

TRIP CHARACTERISTICS

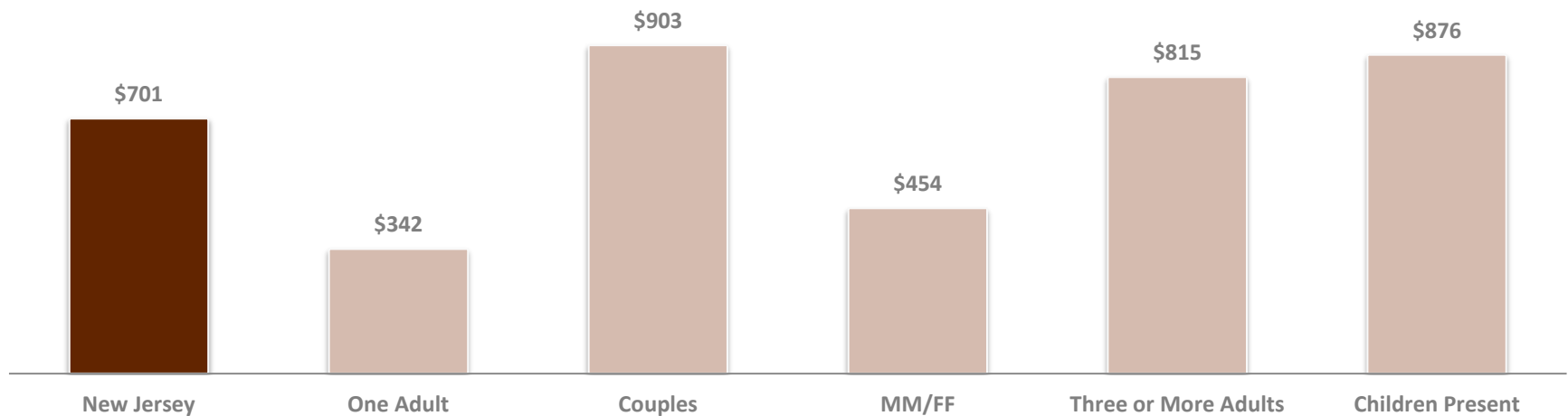


Chart 43 • Segment: 2013-2015 Overnight Leisure Stays (\$) • New Jersey N = 3,863 household count

New Jersey Travel Party Comparison

TRIP CHARACTERISTICS

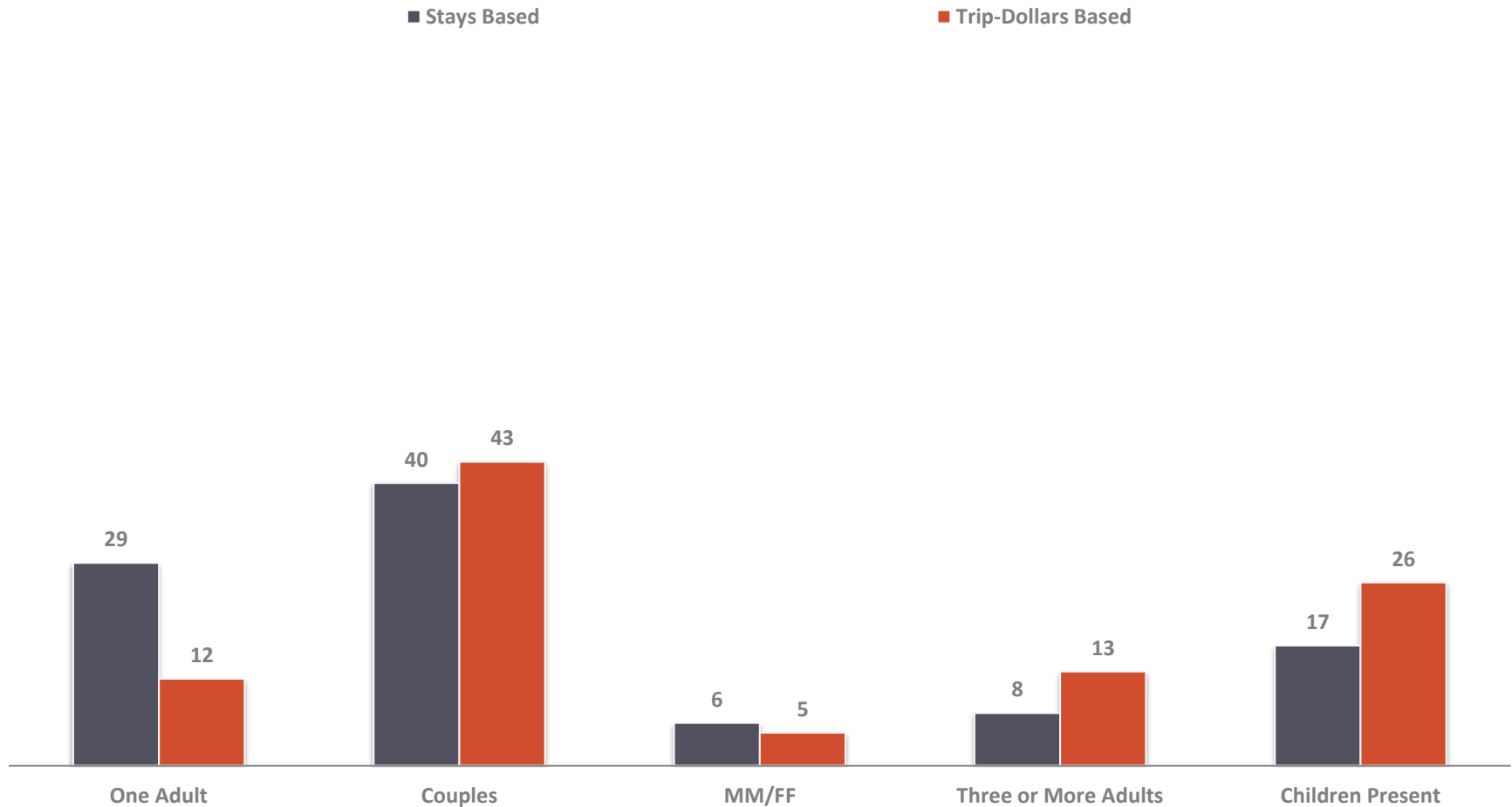


Chart 44 • Segment: 2013-2015 Overnight Leisure (%) • New Jersey N = 4,124 household count

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

TRIP CHARACTERISTICS

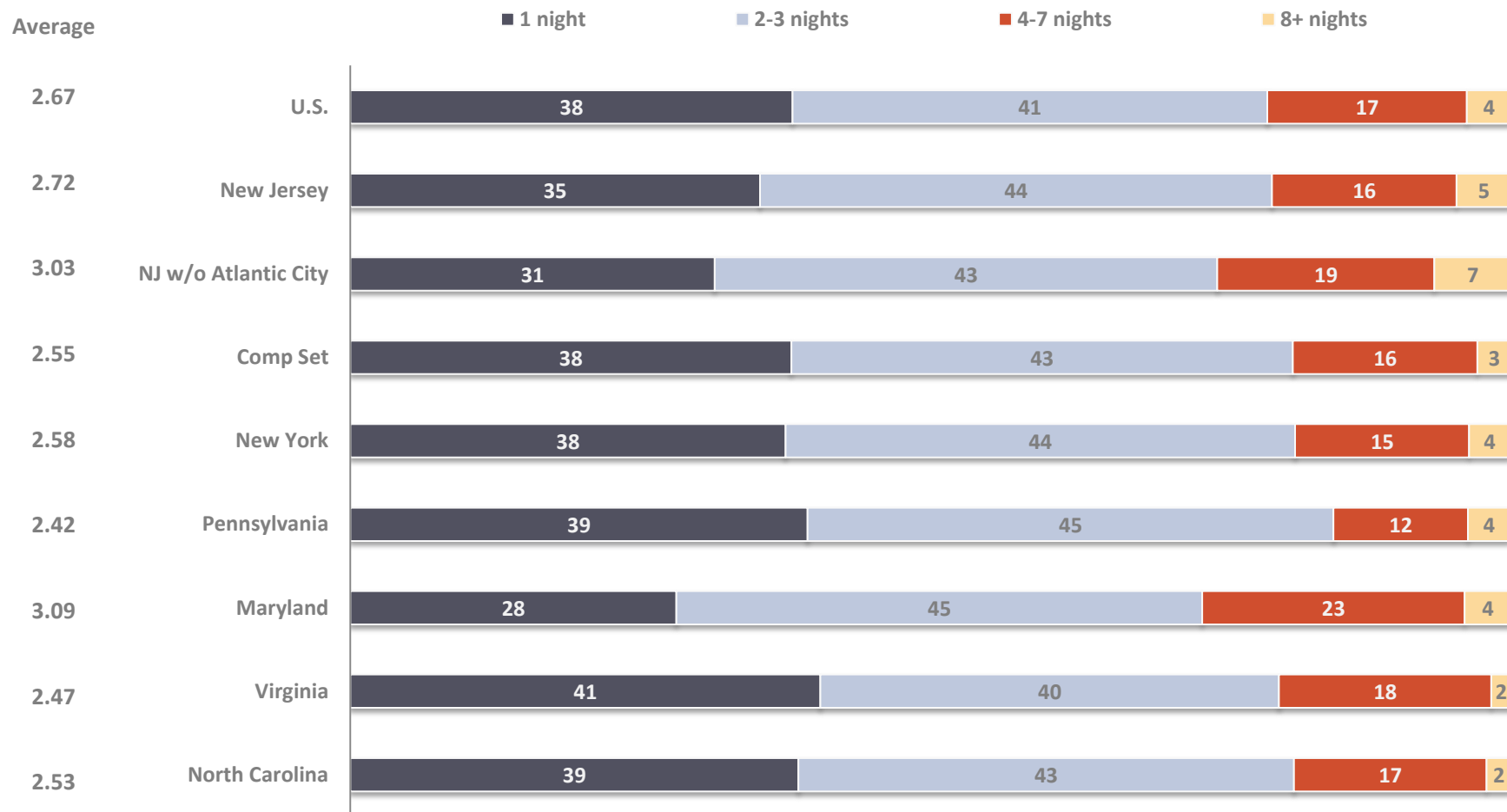


Chart 45 • Segment: 2015 Overnight Leisure Stays (%) • New Jersey N = 1,056 household count

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

TRIP CHARACTERISTICS

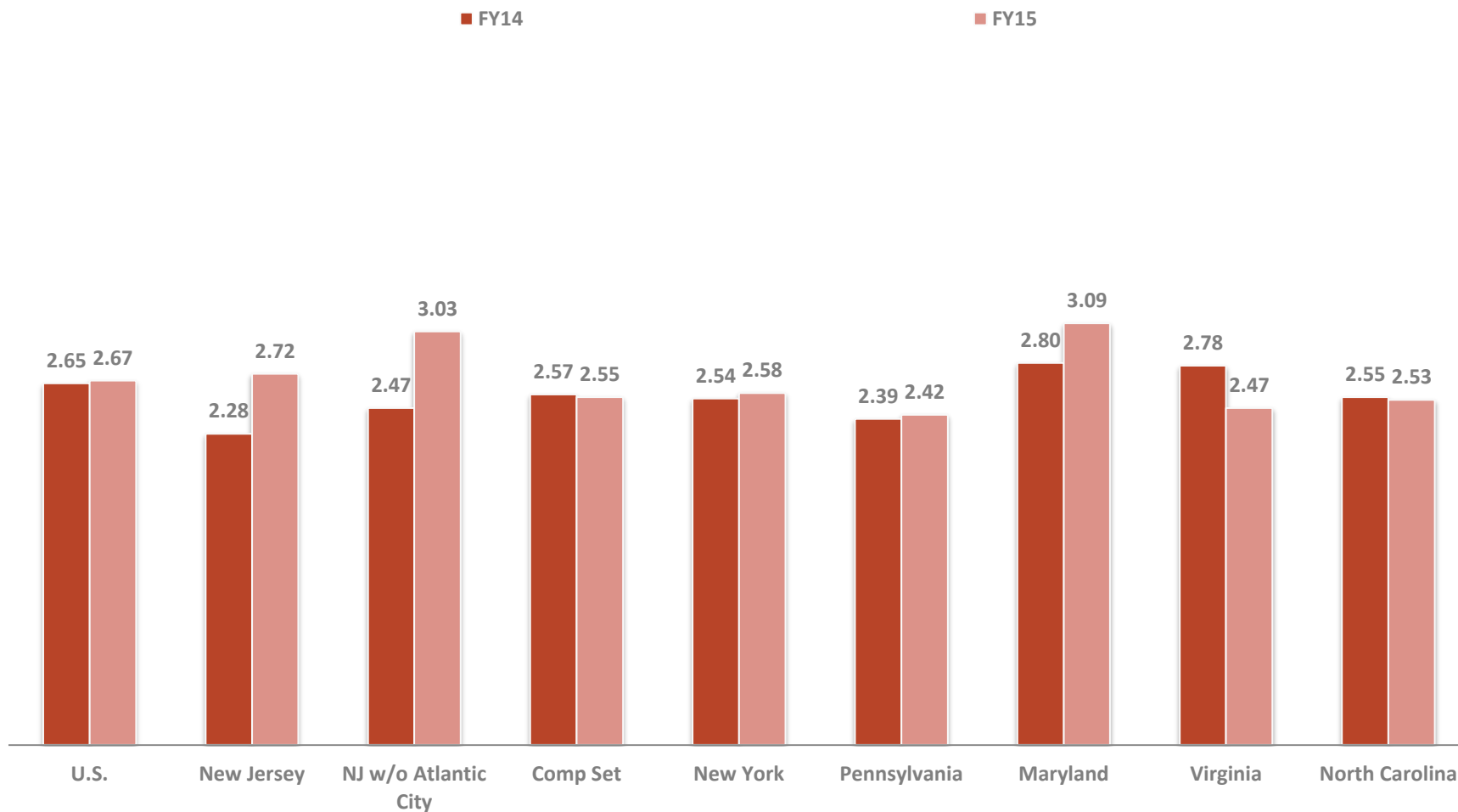


Chart 46 • Segment: 2014/2015 Overnight Leisure Stays • New Jersey N = 1,590/1,056 household count

New Jersey Avg. Party per Stay Spending by Stay Length

TRIP CHARACTERISTICS

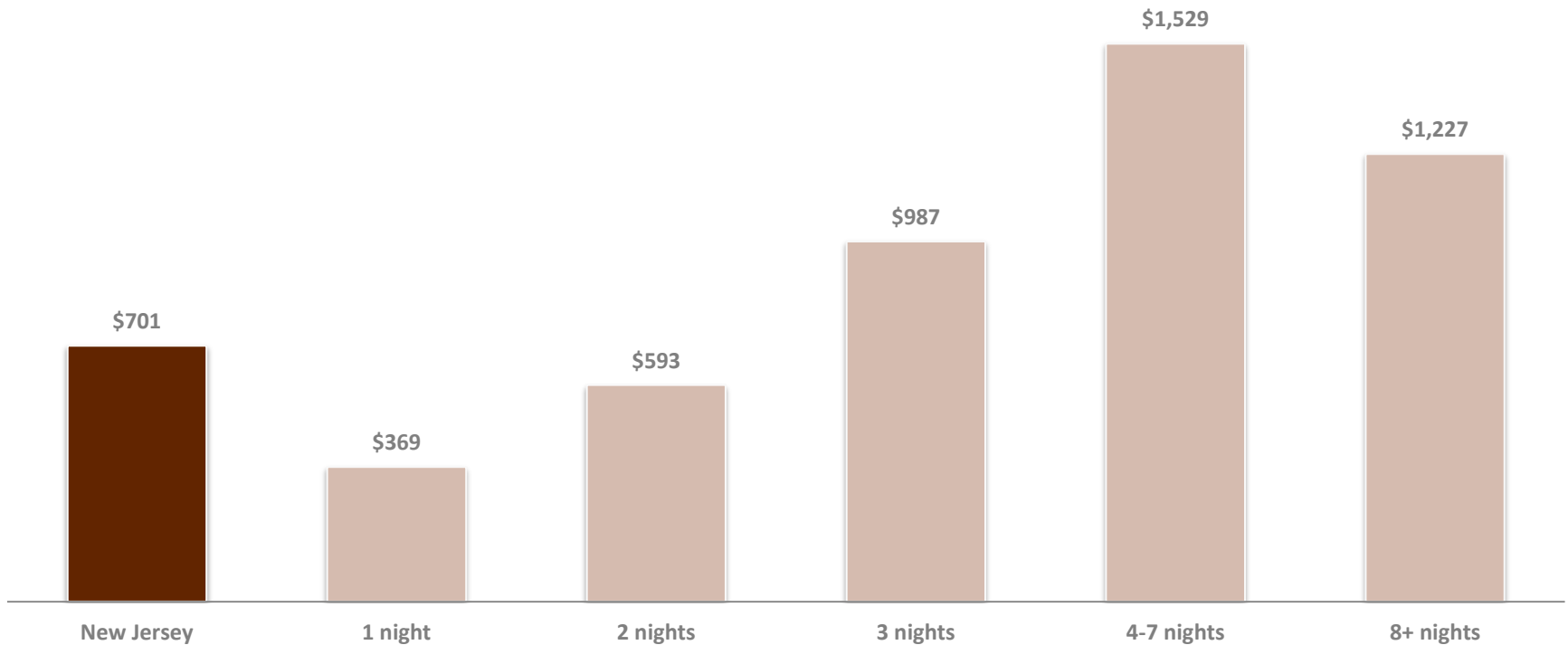


Chart 47 • Segment: 2013-2015 Overnight Leisure Stays (\$) • New Jersey N = 3,864 household count

New Jersey Stay Length Comparison

TRIP CHARACTERISTICS

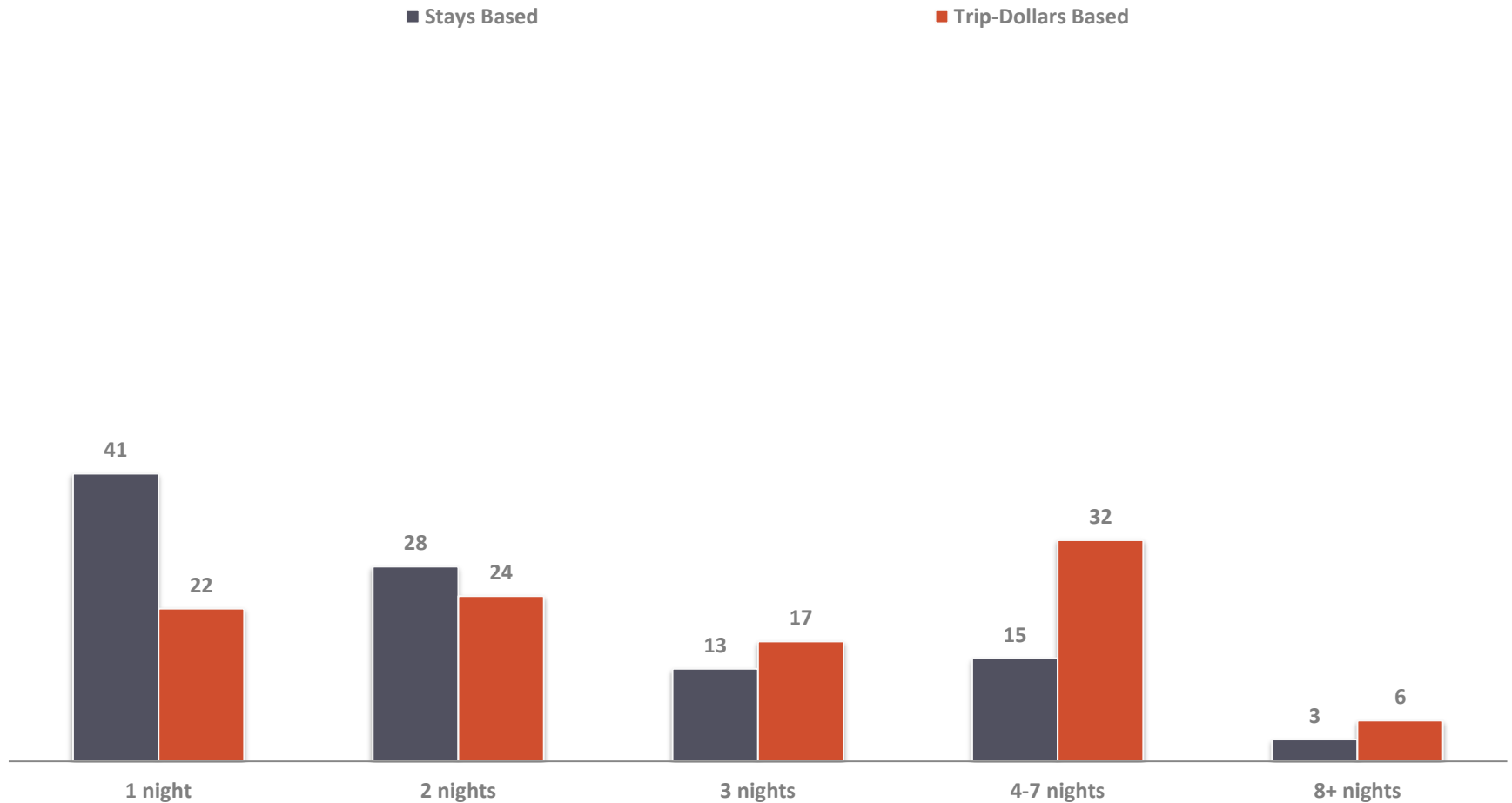


Chart 48 • Segment: 2013-2015 Overnight Leisure (%) • New Jersey N = 4,125 household count

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

TRIP CHARACTERISTICS

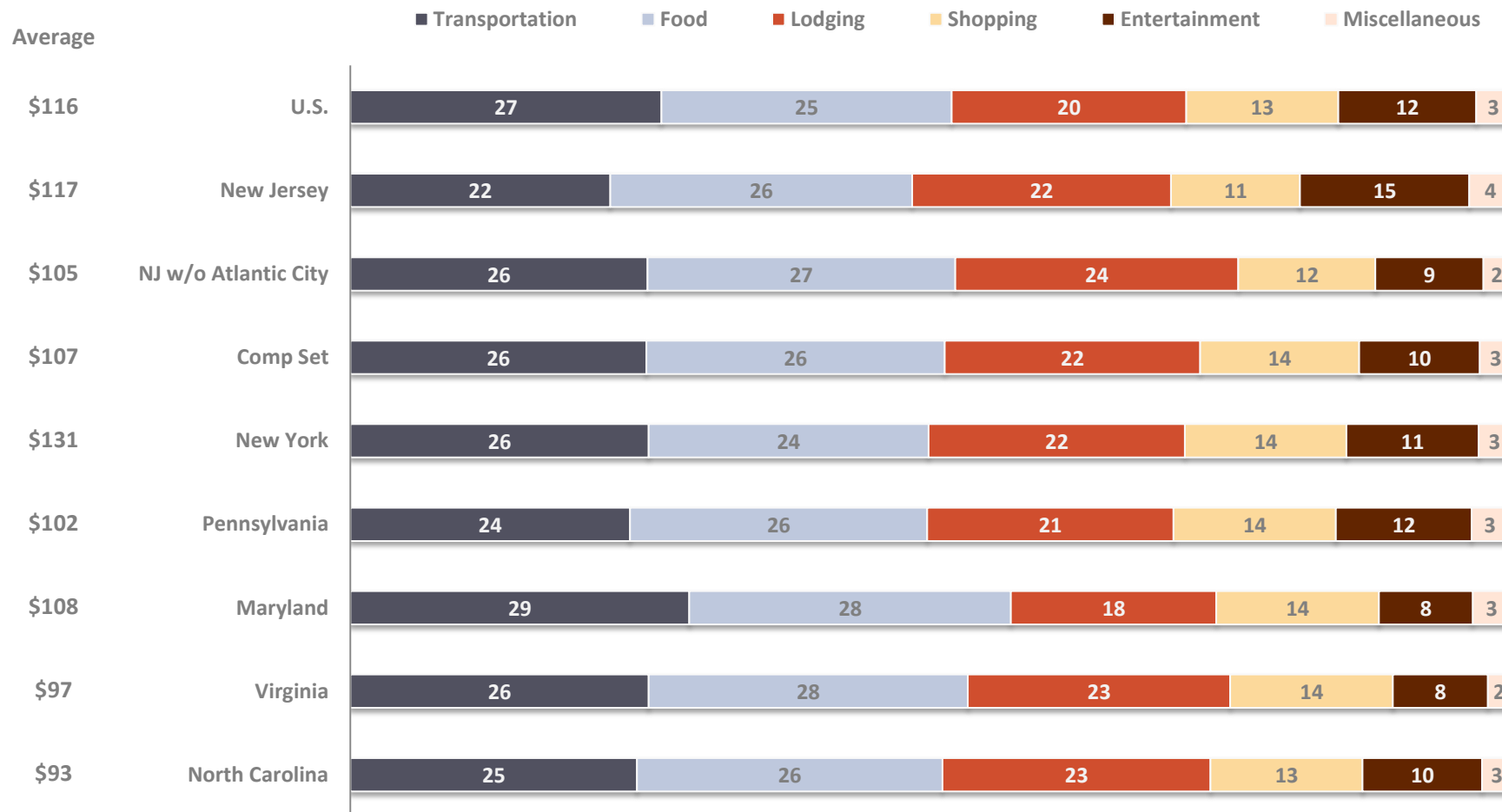


Chart 49 • Segment: 2015 Overnight Leisure Person-Days (%) • New Jersey N = 947 household count

List of All DKSA Activities

ACTIVITY PARTICIPATION

DKSA 2015 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

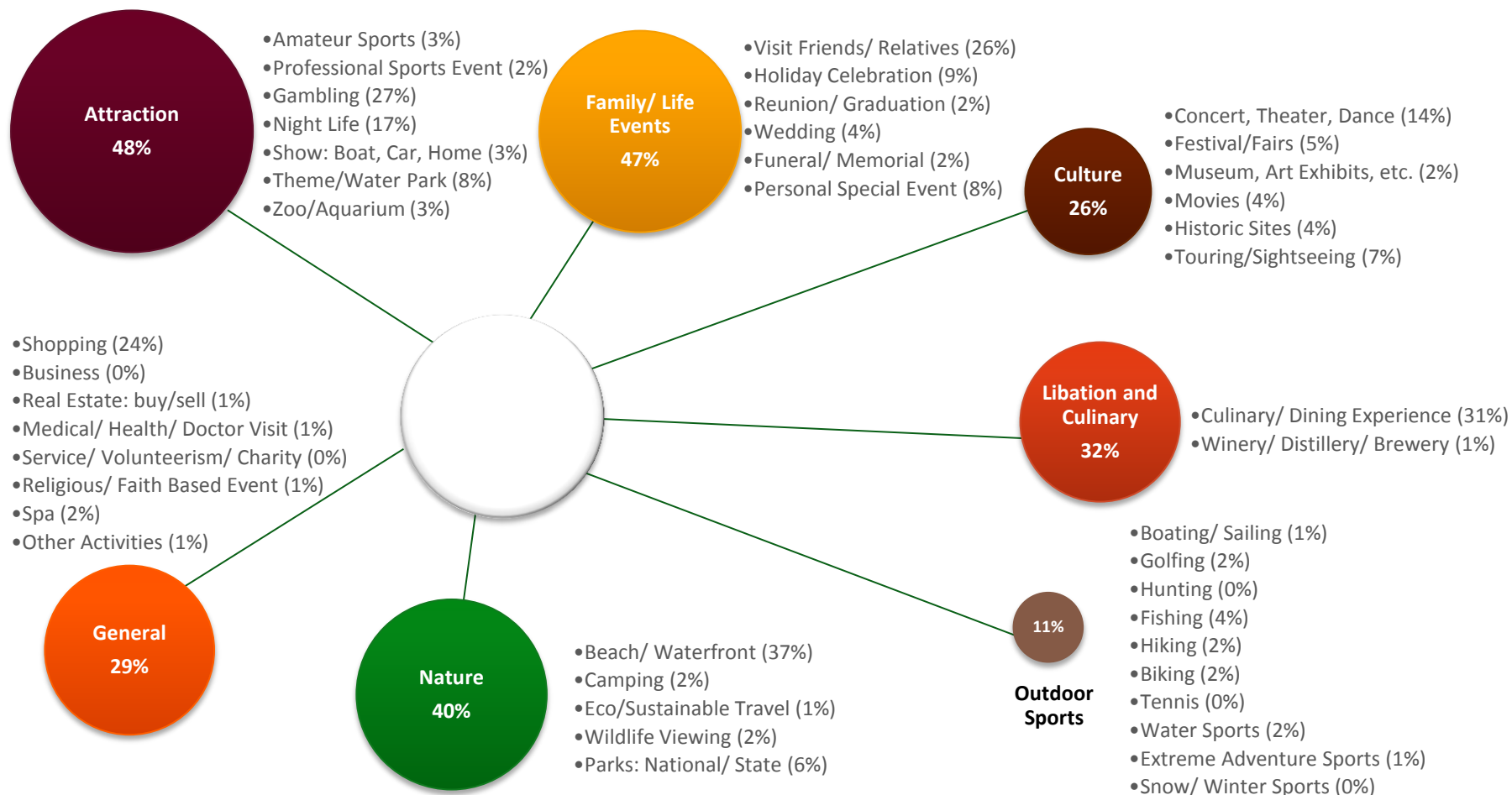


Chart 50 • Segment: 2015 Overnight Leisure Person-Stays (%) • New Jersey N = 1,056 household count

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%	37%	35%	10%	5%	26%	17%	16%
Culinary/Dining Experience	29%	31%	28%	31%	24%	34%	24%	25%
Gambling (slots, cards, horses, etc.)	8%	27%	2%	6%	6%	4%	2%	5%
Visit Friends/Relatives (general visit)	33%	26%	33%	37%	34%	33%	34%	33%
Shopping	26%	24%	24%	25%	21%	28%	25%	22%
Nightlife (bar, nightclub, etc.)	12%	17%	12%	14%	10%	12%	9%	7%
Concerts/Theatre/Dance etc.	8%	14%	9%	14%	9%	6%	7%	6%
Other Personal Celebrations	9%	11%	12%	12%	7%	9%	13%	10%
Holiday Celebration (Thanksgiving, July 4th etc.)	8%	9%	11%	9%	7%	7%	6%	9%
Theme/Amusement/Water Parks	7%	8%	11%	2%	11%	5%	7%	4%
Touring/Sightseeing	15%	7%	9%	16%	13%	9%	14%	12%
Parks (national/state, etc.)	13%	6%	8%	17%	11%	10%	12%	10%
Festivals/Fairs (state, craft, etc.)	6%	5%	6%	6%	6%	6%	4%	6%
Movies	6%	4%	5%	8%	5%	6%	8%	5%
Wedding	3%	4%	6%	3%	3%	3%	2%	2%
Historic Sites	12%	4%	5%	14%	12%	15%	19%	8%
Fishing	4%	4%	4%	3%	2%	1%	5%	5%
Amateur Sports (attend/participate)	4%	3%	4%	3%	3%	3%	3%	5%
Zoo/Aquarium	5%	3%	4%	3%	4%	6%	3%	4%
Show: Boat, Car, Home	2%	3%	3%	3%	2%	2%	2%	2%
Water Sports	3%	2%	3%	2%	2%	3%	3%	4%
Museums, Art Exhibits etc.	9%	2%	3%	16%	10%	9%	8%	8%

Chart 51 • Segment: 2015 Overnight Leisure Stays (%) • New Jersey N = 1,056 household count

Top Activities at the Destination (cont.)

ACTIVITY PARTICIPATION

	U.S.	New Jersey	NJ w/o Atlantic City	New York	Pennsylvania	Maryland	Virginia	North Carolina
Biking	2%	2%	3%	3%	2%	2%	3%	1%
Hiking	6%	2%	2%	6%	5%	2%	7%	5%
Spa	2%	2%	1%	2%	1%	1%	1%	1%
Funeral/Memorial	2%	2%	2%	2%	2%	2%	1%	3%
Wildlife Viewing (birds, whales, etc.)	5%	2%	2%	2%	3%	4%	5%	4%
Camping	4%	2%	3%	5%	3%	2%	5%	2%
Professional Sports Event	3%	2%	2%	3%	5%	3%	3%	3%
Reunion/Graduation	3%	2%	2%	3%	3%	3%	5%	5%
Golfing	2%	2%	2%	1%	2%	3%	3%	2%
Medical/Health/Doctor Visit	2%	1%	2%	2%	2%	2%	2%	1%
Winery/Distillery/Brewery Tours	3%	1%	2%	4%	3%	1%	5%	3%
Religious/Faith Based Conference	3%	1%	2%	3%	3%	2%	2%	3%
Other	2%	1%	1%	2%	2%	3%	3%	2%
Boating/Sailing	3%	1%	1%	2%	2%	3%	3%	3%
Extreme/Adventure Sports	1%	1%	1%	1%	1%	<1%	1%	<1%
Real Estate (buy/sell)	1%	1%	1%	1%	1%	5%	2%	1%
Eco/Sustainable Travel	1%	1%	1%	<1%	1%	<1%	<1%	1%
Tennis	1%	<1%	1%	1%	1%	1%	1%	<1%
Business/Work	1%	<1%	1%	1%	<1%	1%	2%	1%
Service/Volunteerism/Charity	1%	<1%	<1%	1%	1%	1%	<1%	1%
Snow/Winter Sports	1%	<1%	<1%	2%	2%	<1%	1%	1%
Hunting	1%	0	0	<1%	1%	<1%	1%	<1%

Chart 51 • Segment: 2015 Overnight Leisure Stays (%) • New Jersey N = 1,056 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.

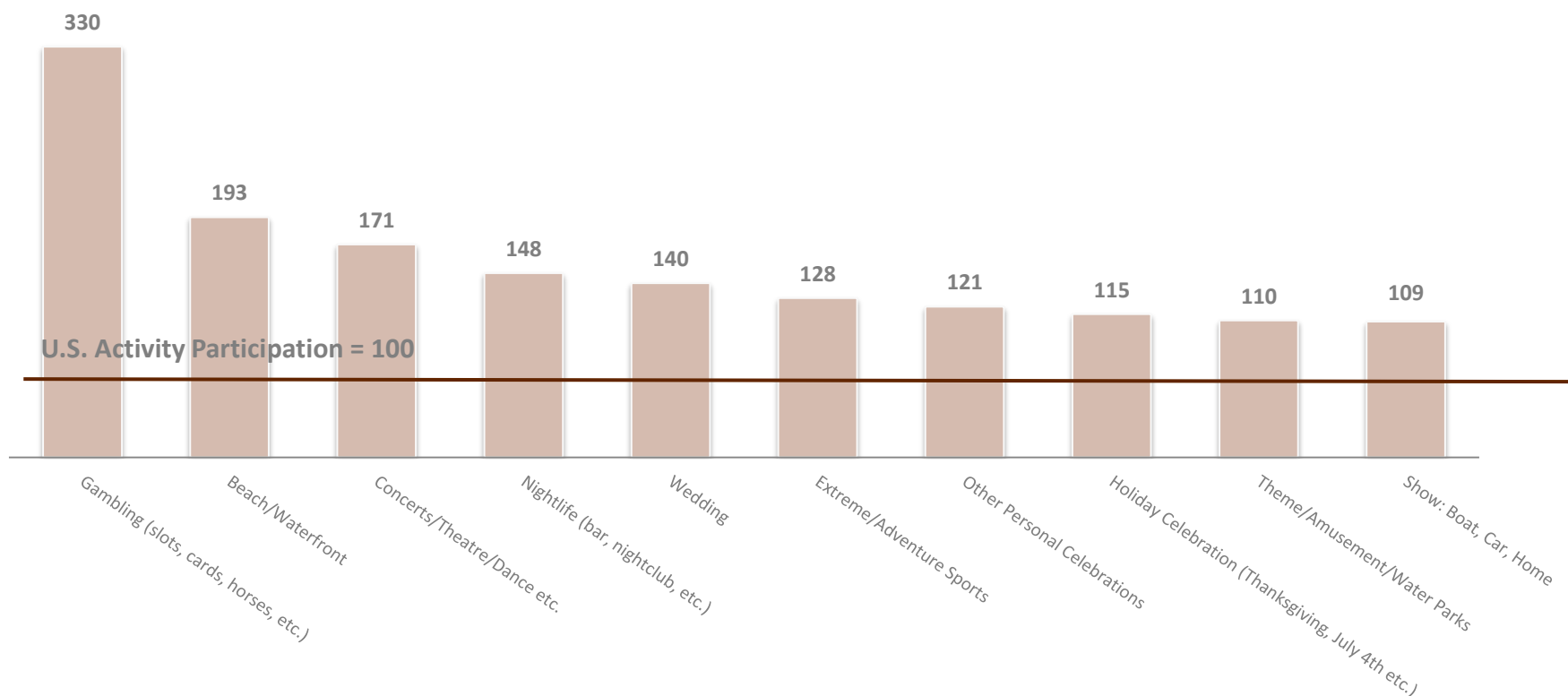


Chart 52 • Segment: 2015 Overnight Leisure Person-Stays • New Jersey N = 1,056 household count

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

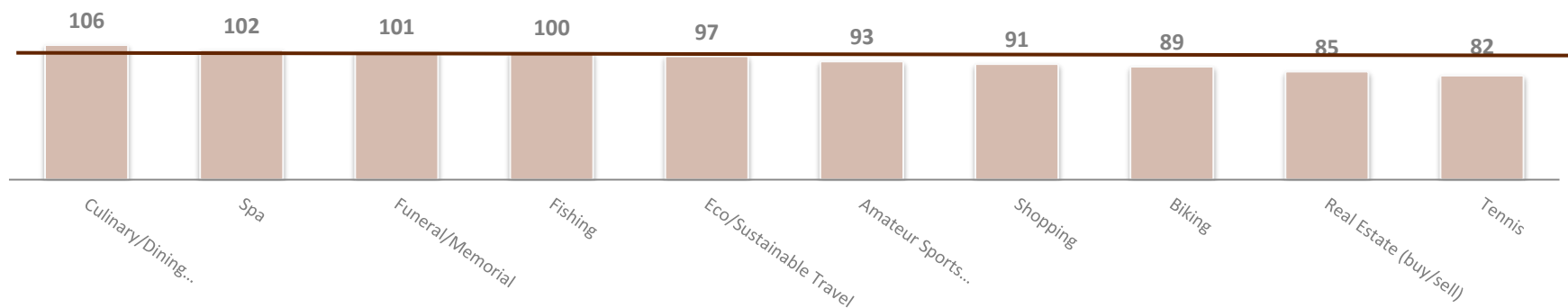


Chart 52 • Segment: 2015 Overnight Leisure Person-Stays • New Jersey N = 1,056 household count

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.

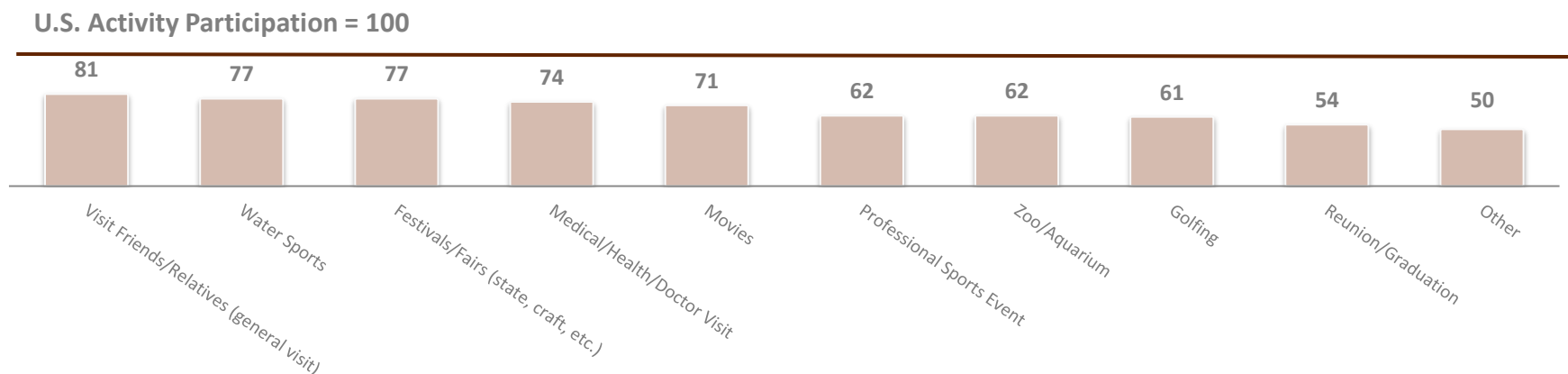


Chart 52 • Segment: 2015 Overnight Leisure Person-Stays • New Jersey N = 1,056 household count

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

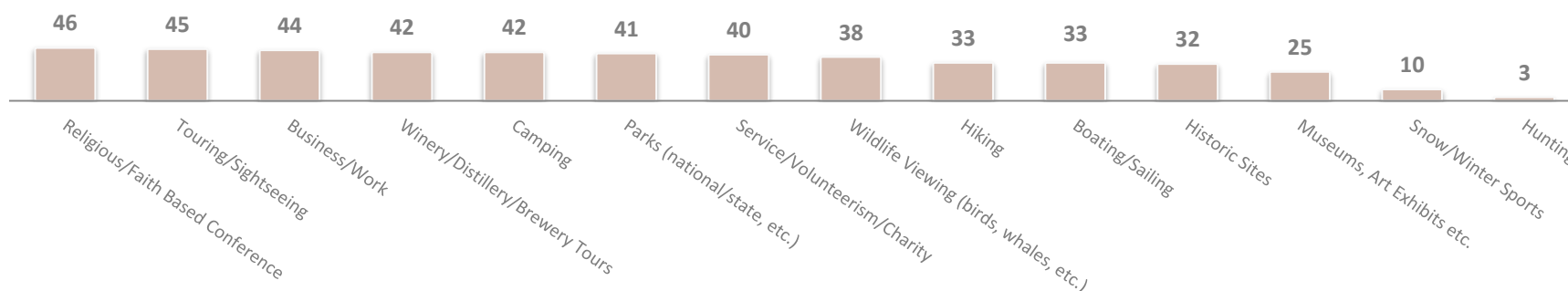


Chart 52 • Segment: 2015 Overnight Leisure Person-Stays • New Jersey N = 1,056 household count

New Jersey Avg. Party per Stay Spending by Activities

ACTIVITY PARTICIPATION

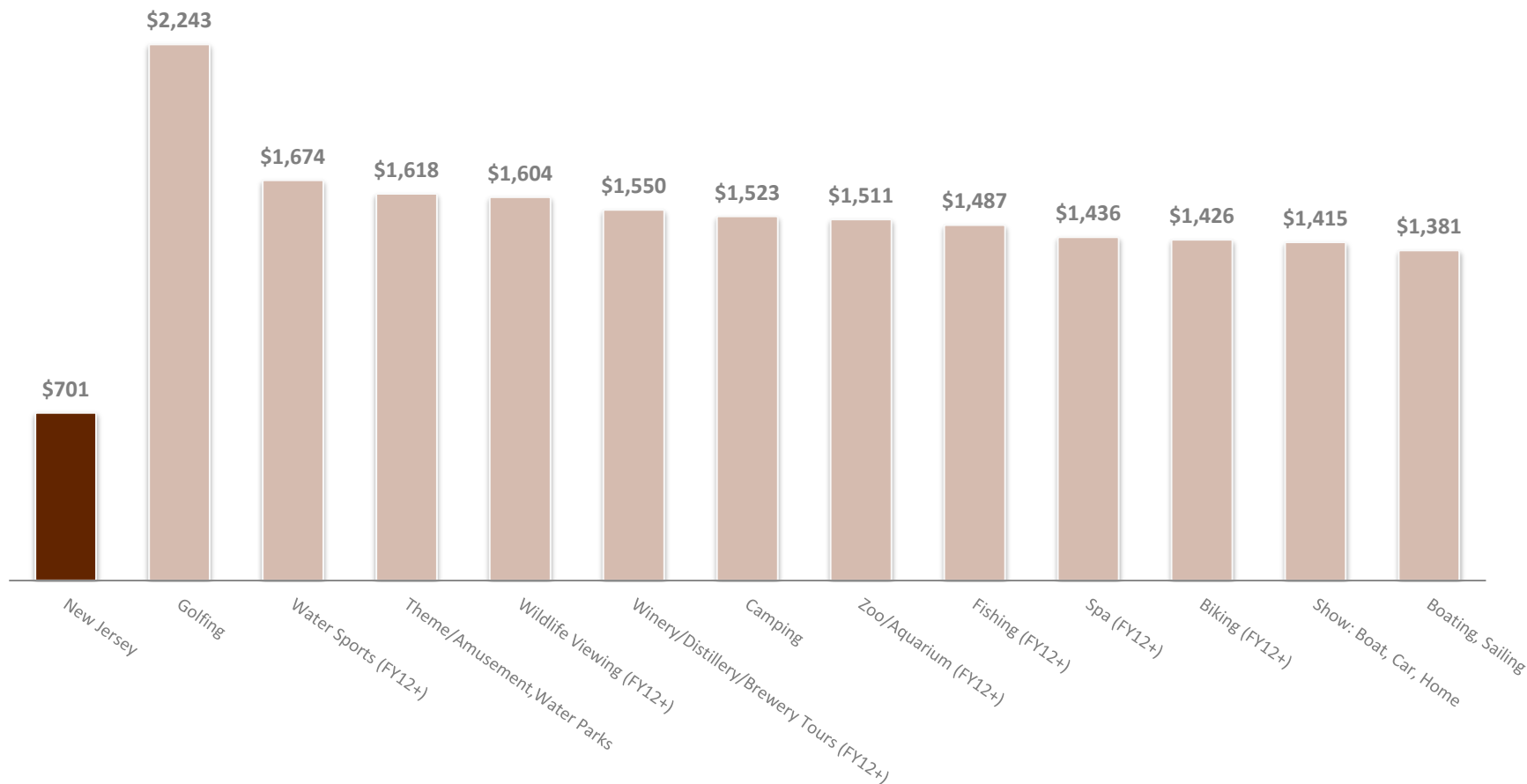


Chart 53 • Segment: 2013-2015 Overnight Leisure Stays (\$) • New Jersey N = 3,864 household count

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

ACTIVITY PARTICIPATION

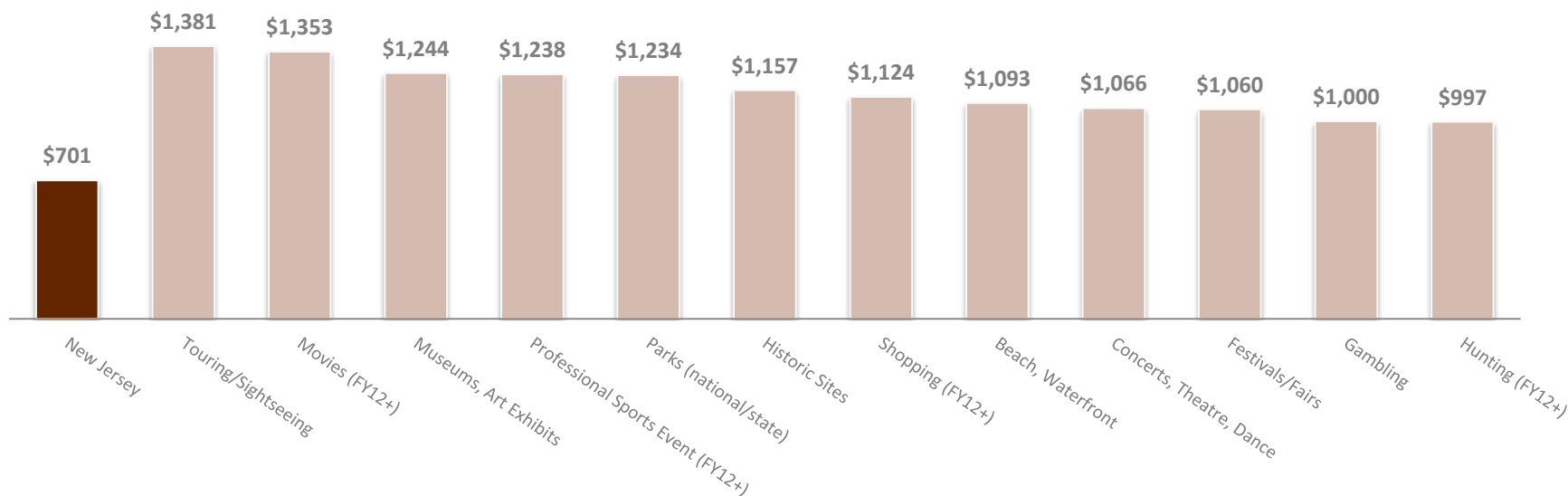


Chart 53 • Segment: 2013-2015 Overnight Leisure Stays (\$) • New Jersey N = 3,864 household count

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

ACTIVITY PARTICIPATION

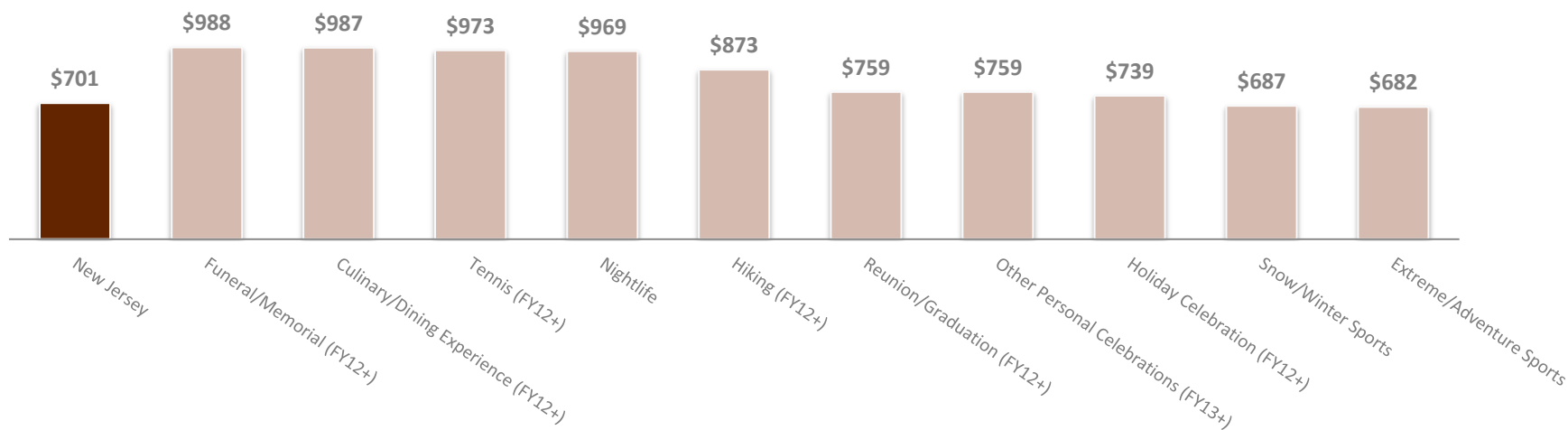


Chart 53 • Segment: 2013-2015 Overnight Leisure Stays (\$) • New Jersey N = 3,864 household count

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

ACTIVITY PARTICIPATION



Chart 53 • Segment: 2013-2015 Overnight Leisure Stays (\$) • New Jersey N = 3,864 household count

New Jersey Activity Comparison

ACTIVITY PARTICIPATION

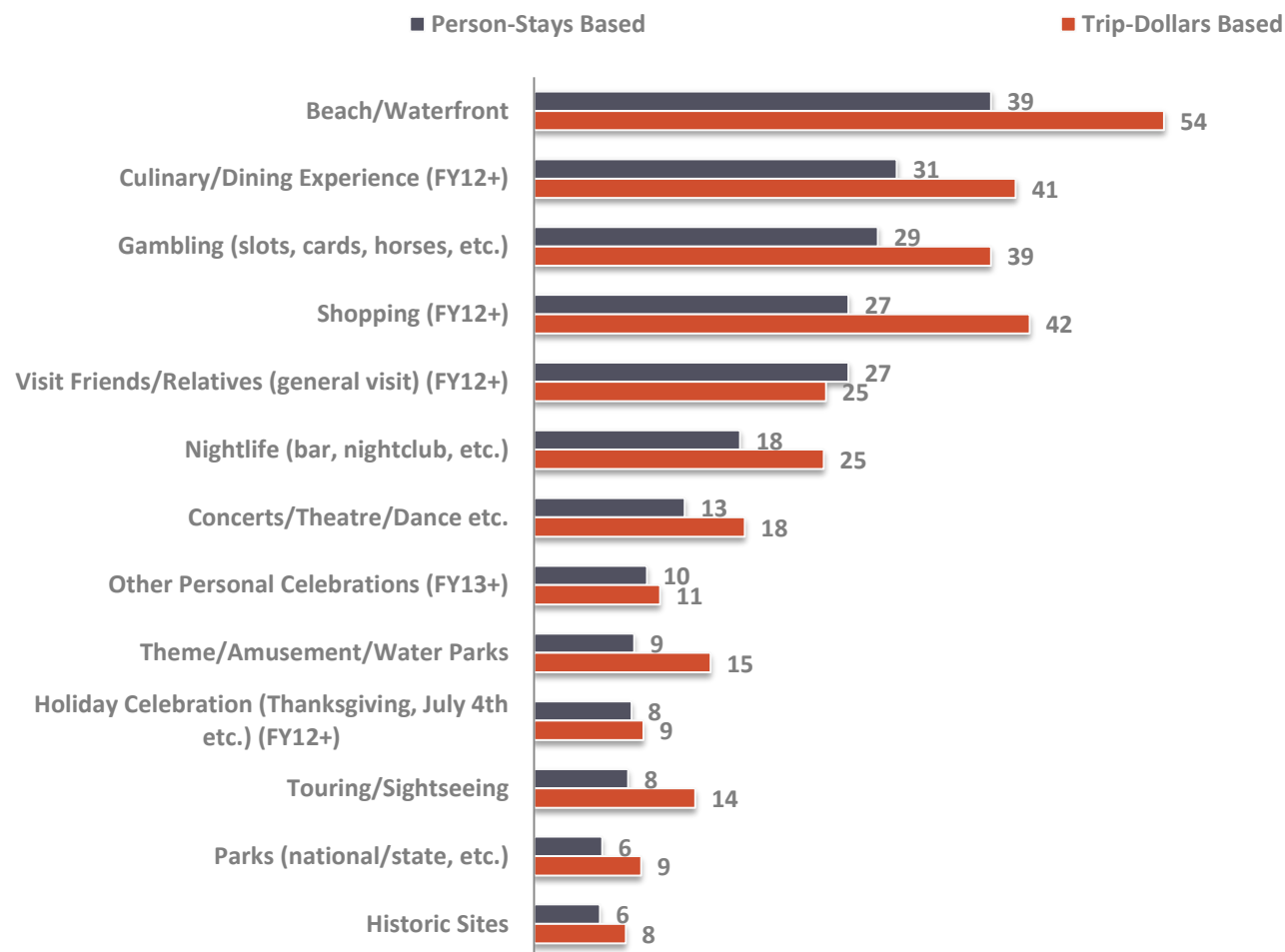


Chart 54 • Segment: 2013-2015 Overnight Leisure (%) • New Jersey N = 4,125 household count

New Jersey Activity Comparison (cont.)

ACTIVITY PARTICIPATION

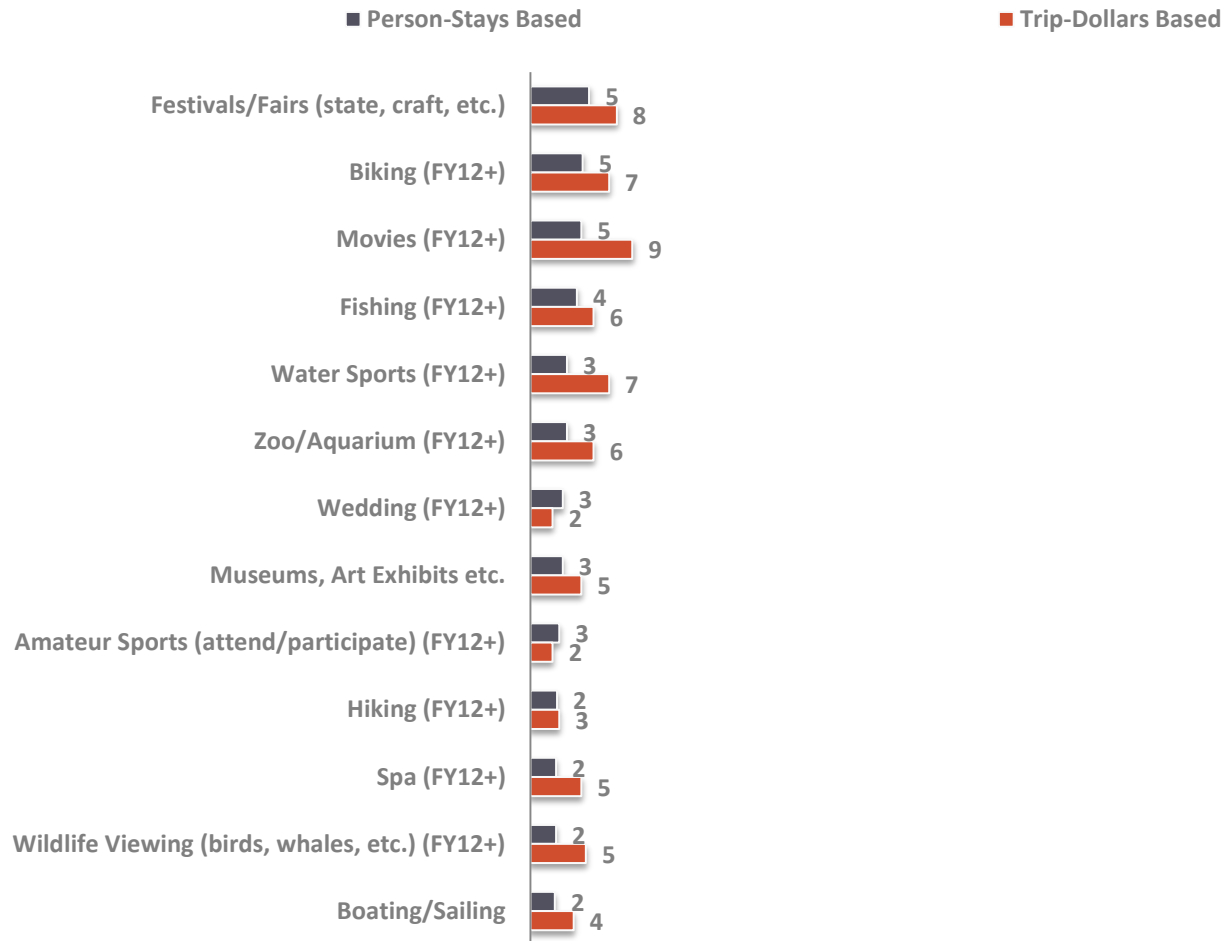


Chart 54 • Segment: 2013-2015 Overnight Leisure (%) • New Jersey N = 4,125 household count

New Jersey Activity Comparison (cont.)

ACTIVITY PARTICIPATION

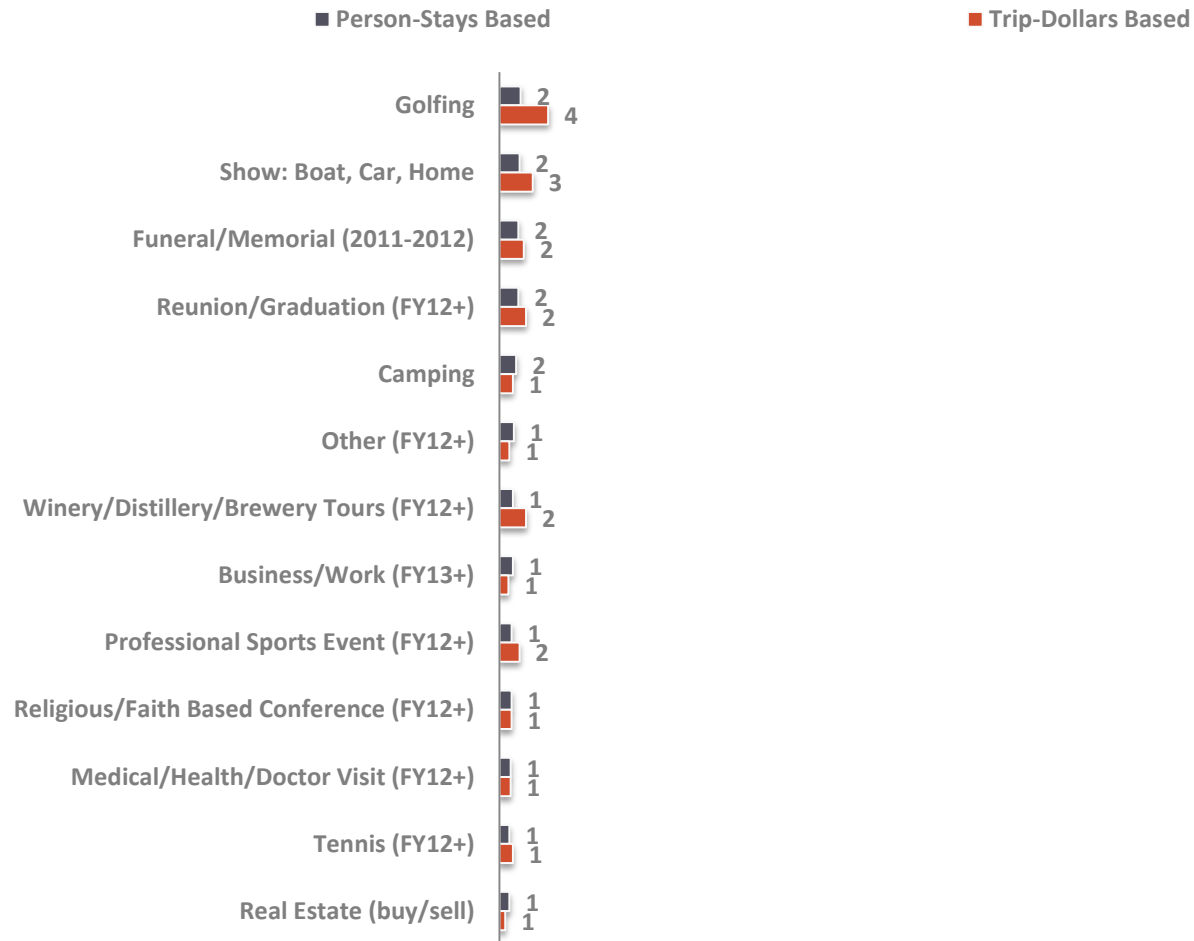


Chart 54 • Segment: 2013-2015 Overnight Leisure (%) • New Jersey N = 4,125 household count

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

ACCOMMODATION

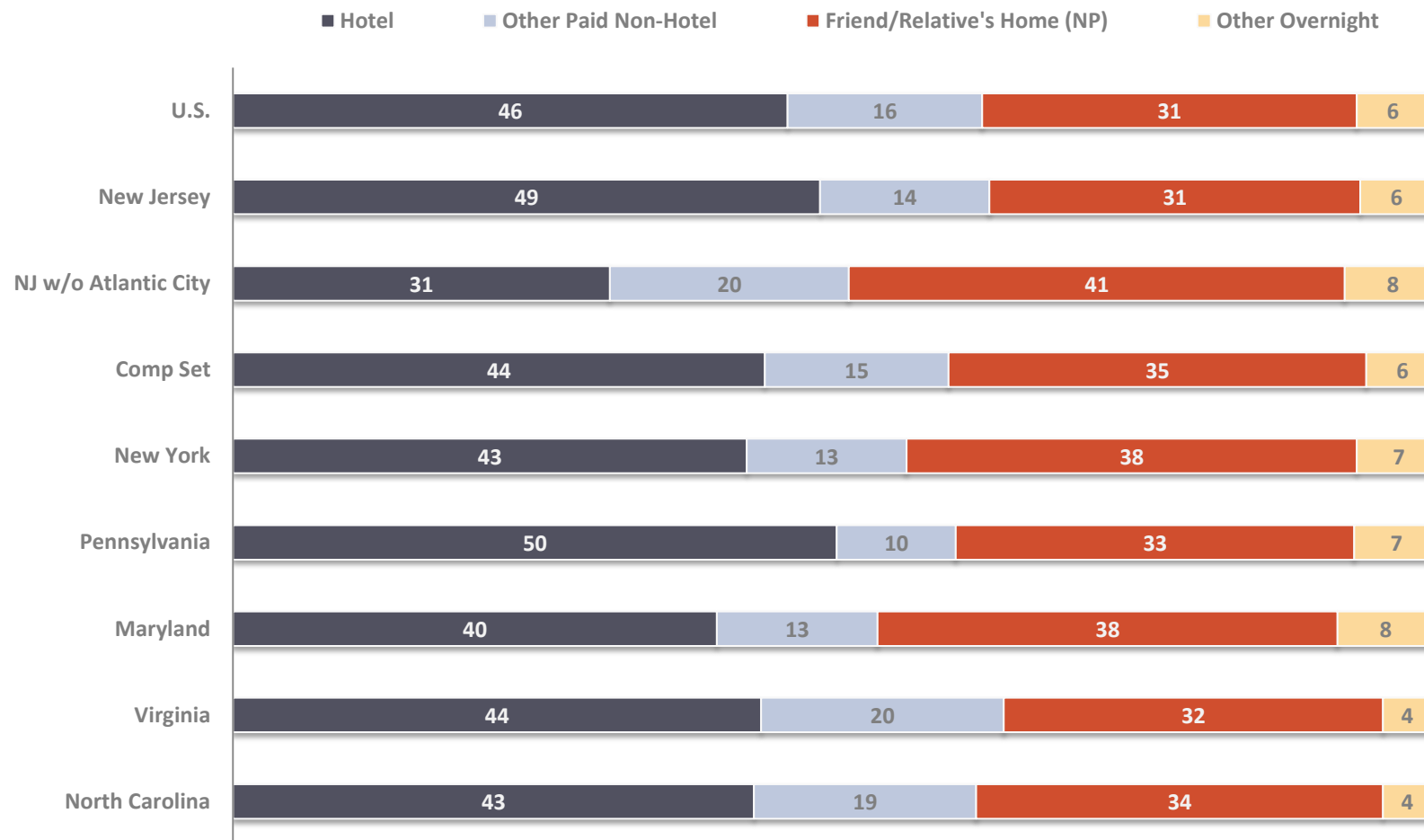


Chart 55 • Segment: 2015 Overnight Leisure Person-Stays (%) • New Jersey N = 1,056 household count

New Jersey Avg. Party per Stay Spending by Accommodation Type

ACCOMMODATION

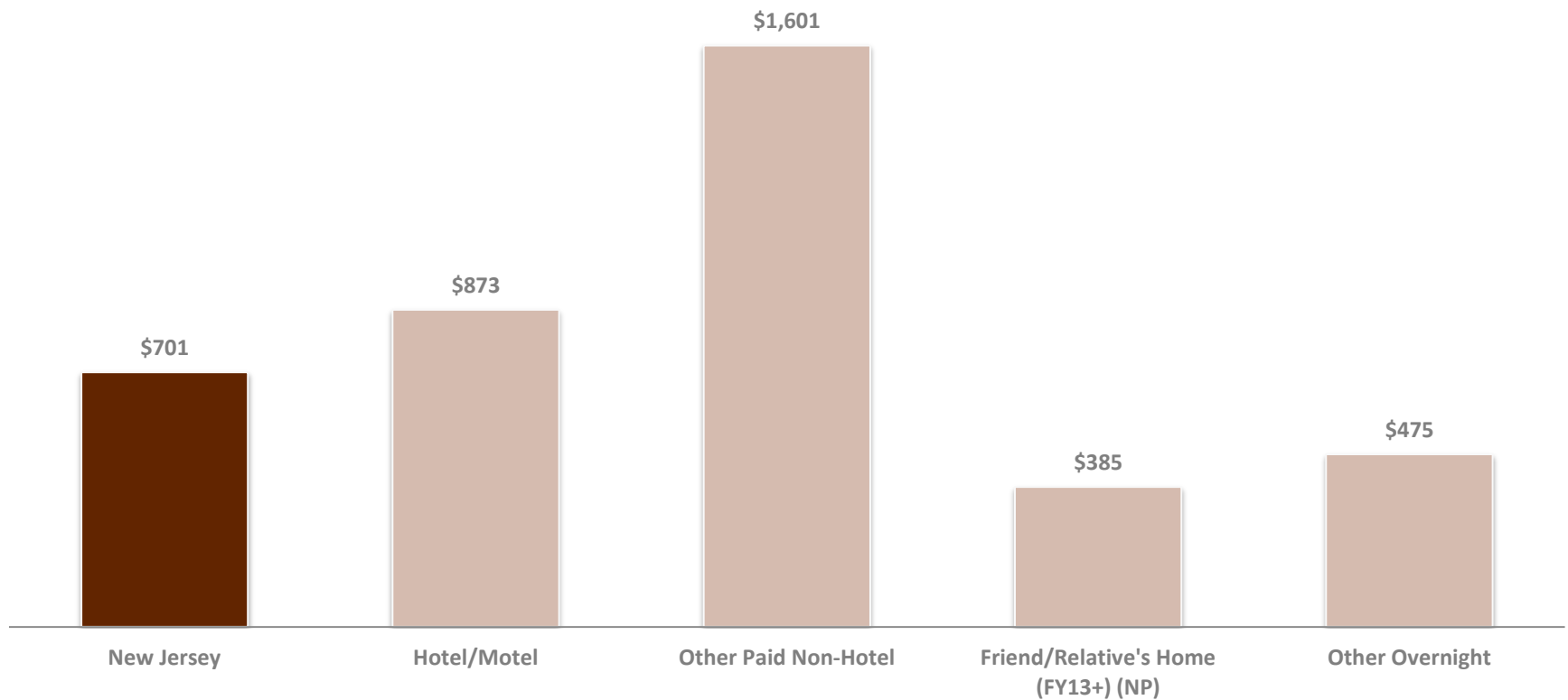


Chart 56 • Segment: 2013-2015 Overnight Leisure Stays (\$) • New Jersey N = 3,864 household count

New Jersey Accommodation Type Comparison

ACCOMMODATION

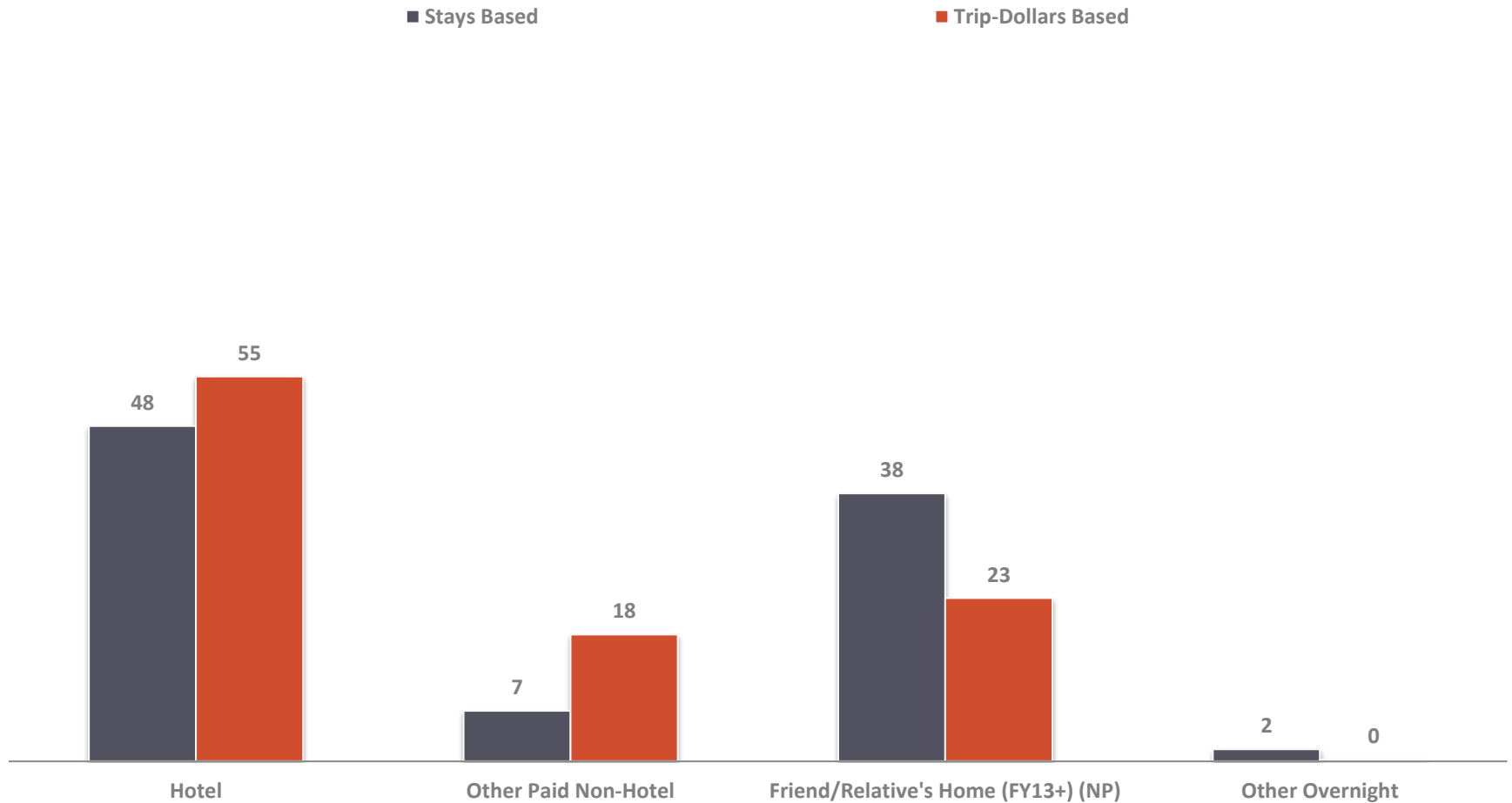


Chart 57 • Segment: 2013-2015 Overnight Leisure (\$) • New Jersey N = 4,125 household count

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 2015	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.	35,062	0.1%	0.2%	0.2%	0.3%	0.4%
New Jersey	1,056	0.5%	0.9%	1.3%	1.9%	2.5%
NJ w/o Atlantic City	757	0.6%	1.1%	1.6%	2.3%	3.0%
Comp Set	7,039	0.2%	0.4%	0.5%	0.7%	1.0%
New York	2,534	0.3%	0.6%	0.9%	1.2%	1.6%
Pennsylvania	1,714	0.4%	0.7%	1.0%	1.5%	2.0%
Maryland	788	0.6%	1.1%	1.5%	2.2%	2.9%
Virginia	1,257	0.5%	0.9%	1.2%	1.8%	2.3%
North Carolina	1,432	0.4%	0.8%	1.1%	1.6%	2.2%

Example:

If the car travel finding for New Jersey 91% and the sample size is 1,056, using the chart, we can say that at the 90% level of confidence the proportion ranges between 89.7% and 82.3%.

Example:

If the Auto travel (NET) finding to the destination by New Jersey Overnight Leisure travelers is 87% in previous time period and 91% in current time period, using the chart, we can say that the actual proportion change is statistically significant since the resulting Z score (-3.17) is larger than the table Z score (-1.64).

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	87%	91%		(+/-) 1.96	95%
Sample Size (n)	1,590	1,056	-3.17	(+/-) 1.64	90%

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.