

2018 NEW JERSEY VISITOR PROFILE

Executive Summary

Charts & Graphs

Appendix

*INSIGHTS
THAT TAKE
YOU
PLACES*

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Fiscal Year 2018 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 US and New Jersey travel trends from Fiscal Year 2018. 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,

*In 2018, New Jersey hosted a total...
109.4 Million visitors, spending...
\$22.5 Billion dollars*

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

Volume and profile data are from D.K. Shifflet's **PERFORMANCE/MonitorSM** – the largest travel tracking system in the U.S. The 2018 New Jersey Overnight Leisure Visitor Profile is based on a sample of 825 traveling households. Data are based on a fiscal year comprised of fourth quarter 2017 through third quarter 2018. DKSA finalizes, and makes all quarterly data adjustments, after data collection for the fourth quarter of the year. Therefore fiscal year 2018 data are considered 'preliminary' meaning that it is subject to year end 2018 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 continued efforts to recover from natural and financial disasters, the State has experienced steady growth in visitation and spending since 2010. Both,

visitation and spending, reached another all-time high in 2018.

Travel for business and leisure both saw sizeable increases in 2018, especially among Day Leisure travelers.

While New Jersey as a whole experienced growth in overall travel in 2018, New Jersey excluding Atlantic City saw the highest year over year growth, meaning that other parts of the State are contributing to visitation.

New Jersey Fiscal Year 2018 Highlights:

- Record high visitation and spending in 2018
- Continued growth in Overnight Leisure visitor volume and spending
- Non-Atlantic City portions of the state account for the largest share of visitor growth
- New Jersey remains at 5th in market share among its competitors
- Visitor demographics are changing as visitation to non-Atlantic City regions grows
- Beach/Waterfront remains at number 1 for Activity Participation

STUDY SPECIFICATIONS

Travel definition: An Overnight trip defined as going someplace, staying overnight and then returning home

Sampling Frame: All U.S. domestic Overnight Leisure travelers during Fiscal Year 2018 in New Jersey.

Timeframe: Fiscal Year 2018 (Q4 2017 – Q3 2018)

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 tend to be older, retired, visit for short getaways, stay in hotels, and are less likely to have children in their travel parties. 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 continue to change.

The average age of New Jersey visitors remained the same in 2018 at 51 years old, which is older than visitors to the average U.S. destination or to the Competitive Set by one year. New Jersey visitors are less likely to have children in the household (34%, an increase of 2 percentage points from 2017), which is less than the average U.S. destination or to the Competitive Set.

The reasons for these demographics are likely due to visitor destination choices. The Atlantic City region accounts for the largest share of visitation in the State, and this region experienced a decrease in its share of visitors to the State (from 38% in 2017 to 35% in 2018) while the Gateway, Southern Shore, and Shore regions all saw inclines in 2018. The Skylands and Delaware River regions were the only other non-Atlantic City to experience decline in 2018.

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.

In 2018, New Jersey dropped to 3rd while Pennsylvania remained the number 1 supplier of visitors to the State. New Jersey visitors tend to take more leisure vacations than their out-of-state counterparts, which can lead to a small increase in average spending per stay due to money spent on lodging.

The same activities are in the top 5 for New Jersey in 2018 with no position changes from 2017. Looking at New Jersey excluding Atlantic City, gambling drops from 14th in 2017 to 25th in 2018. Though they may be in a different rank order, Visiting Friends and Relatives, Beach/Waterfront, Shopping, and Culinary/Dining Experience all appear in the top 5 for the entire State and for the Non-Atlantic City regions separately.

Executive Summary

Average Destination Satisfaction and Value ratings for the State remain high (8.64 and 8.54 respectively on a 10-point scale) and both the Satisfaction average and the Value for the Money average increased from 8.32 and 8.20 respectively in 2017. For both dimensions, the non-Atlantic City portion of the State saw similar increases from 2017, but while the Value is nearly the same as New Jersey, Satisfaction is higher at 8.73 compared to the whole State's 8.33. Average Hotel Satisfaction ratings have risen to 8.4 despite a decrease in the number of visitors staying in Paid Accommodations in 2018. Many variables can impact perceived satisfaction and value including changes in pricing or changes in the perceived quality or availability of the product. Overall, 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. Many factors have contributed to this growth. The New Jersey Sports Betting Act finally allowed the state to make their own decisions with regards to sports betting following a decision made by the U.S. Supreme Court in 2018. Legalized sports betting paves the way for casinos and racetracks to take wages and provide the state with a new source of revenue. 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.

Executive Summary

The following report summary pages highlight key segments which dominate the mass market in New Jersey Overnight Leisure travel and are customers with a high share in visitation that deserve attention.

Focus on your Customers:

- Record spending and visitation numbers
- After years of decline, New Jersey remained fifth in market share among its competitors and place 16 of all US States
- Majority are mature travelers, working in managerial occupation, belonging to the Affluent Mature lifestage
- Majority stay at paid hotels (Economy and Other Hotels), travel for the purpose of a Getaway Weekend and Visiting Friends/Relatives and participate in a variety of Family, Attraction and Nature-based activities
- New Jersey Overnight Leisure travelers (excluding Atlantic City) stay slightly longer than travelers to the US average destination or its competitors due to fewer single night and more 4-7 nights stays
- New Jersey attracts repeat visitors (travelers visited more than 4+ times in past 3 years than any of its competitors)
- New Jersey is a preferred summer travel destination (June, July, August)
- Pennsylvania, New York, and New Jersey are primary Origin States for travel
- largest share of Overnight Leisure visitors arrive from New York/NY and Philadelphia/PA DMAs (average one-way travel distance of 190 miles)
- New Jersey receives higher average destination ratings but lower average hotel ratings without Atlantic City
- Majority plan trip to New Jersey between 2 weeks and 3 months (trip planning time frame without Atlantic City is slightly longer)

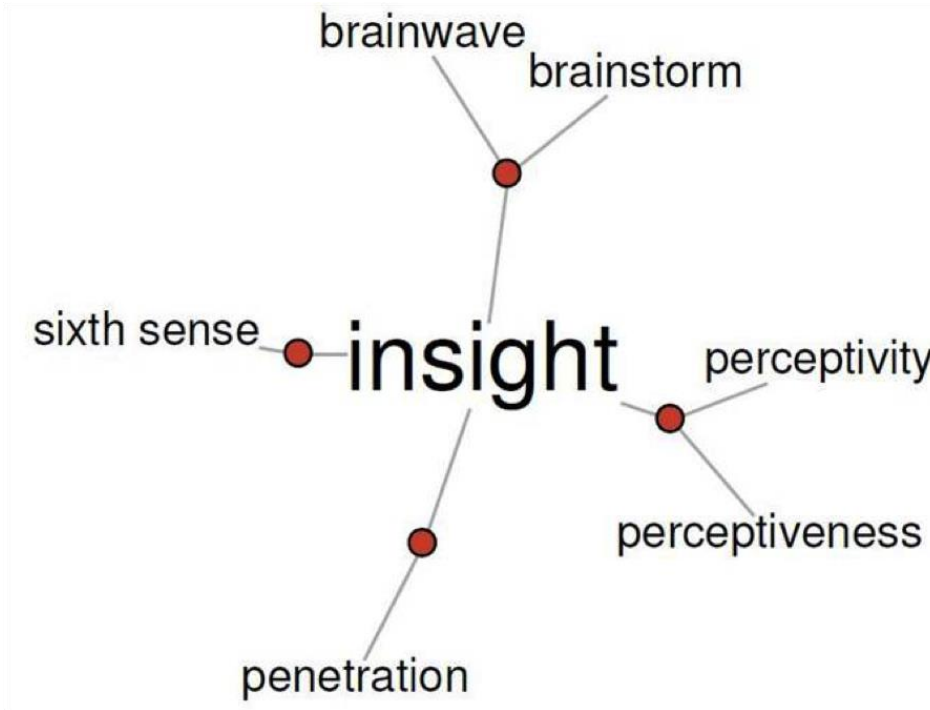
Executive Summary

While understanding the Overnight Leisure travel market in terms of who is visiting the State, why, and what they do is imperative in painting a picture of travel to New Jersey, it is also important to focus on the opportunities that lie ahead for

New Jersey travel. Many segments have the potential to offer not necessarily a high travel party share but are characterized by an even higher trip-dollar spending share which makes these segments particularly valuable to target.

Focus on your Opportunity:

- Travelers 55+ years, Affluent Mature lifestage
- Travelers staying in High-End & Economy hotels, and Paid Non-Hotels
- Travelers staying 3+ nights stays
- Visitors traveling in travel parties of 3+ adults or with children
- Visitors traveling for General Vacation and Getaway Weekend
- Summer travelers



Travel Year Review

New Jersey 2018 Overnight Leisure Visitor Profile

Visitor Volume and Spending

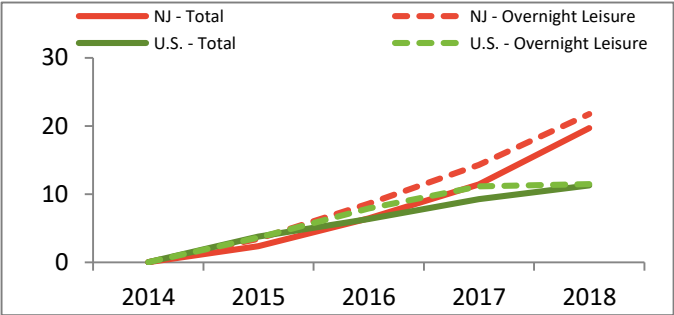
New Jersey hosted a little over 109 million visitors, spending over 22 billion dollars in 2018 – another all time high for both visitors and spending in the State. The Atlantic City region contributed 43 percent of all Overnight Leisure spending in New Jersey.

New Jersey continued to experience growth in total visitor volume and associated spending. Spending grew at a lower rate than the average U.S. destination over 2017. New Jersey had higher growth in overall total visitation in 2018 than the average U.S. destination and New Jersey's growth in Overnight Leisure visitors was again ahead of the average U.S. destination.

For the past two years spending in New Jersey has grown slower than the average U.S. destination however. However, all of New Jersey's travel segments increased their spending in 2018...some of them for the first time in 4 years, such as Day (+7.4%) and Overnight Business (+0.6%).

Visitor Volume

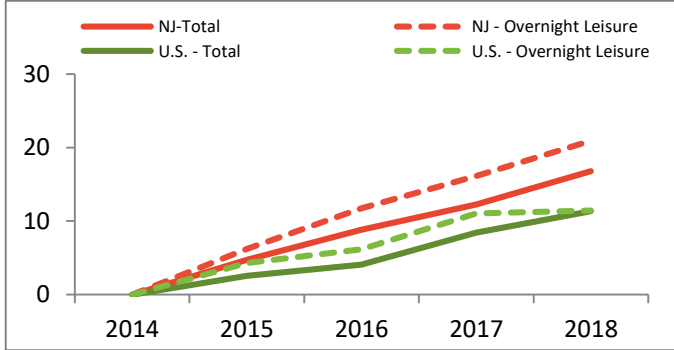
PERSON-STAYS (millions) INDEXED TO 2014



109.4 Million Visitors — 7.4% ↑
48.0 Overnight Leisure — 6.5% ↑

Visitor Spending

DIRECT SPENDING (billions) INDEXED TO 2014



\$22.5 Billion Dollars — 4.0% ↑
\$16.2 Overnight Leisure — 4.1% ↑

GLOSSARY

Note: Data in these graphs indexed to 2014 – data shows yearly change as compared to 2014 rather than year over year percent change – this depicts a more accurate relationship between the segments

Note: Fiscal Year volume and spending figures subject to change due to year-end 2018 quarterly adjustments

Visitor Volume and Spending

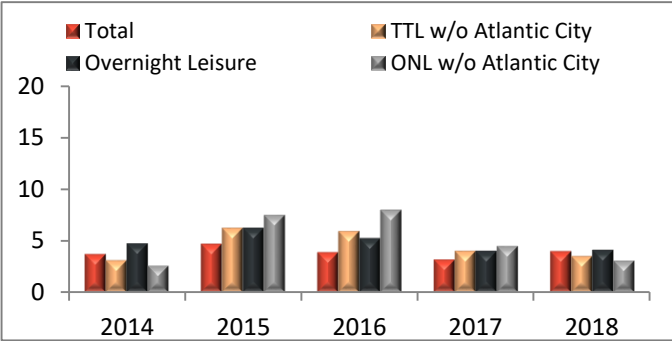
Atlantic City has always had a substantial impact on the overall statistics for New Jersey, but this may be changing.

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 2018, however, the non-Atlantic City portion of New Jersey drove growth in Total visitation and growth in Overnight Leisure visitation.

For spending, this trend is different. New Jersey as a whole saw higher growth in Total and Overnight Leisure spending than the state without Atlantic City.

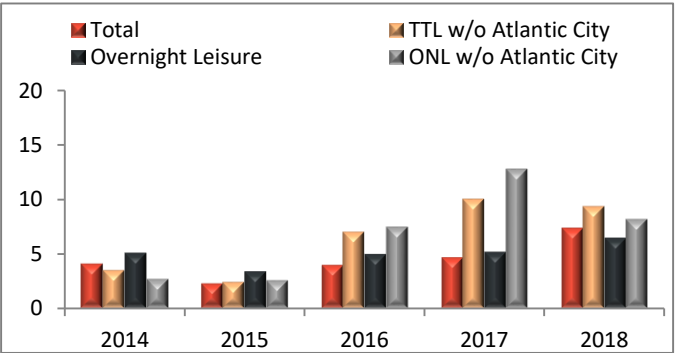
Visitor Spending

SPENDING (% change) INDEXED TO 2012



Visitor Volume

PERSON-STAYS (% change) INDEXED TO 2012



New Jersey without Atlantic City is 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.

In 2018, the growth in visitors outpaces the growth in spending, indicating that those who are coming are spending less than in the past. This can be good news as it indicates an opportunity for spending growth in the Atlantic City area. New Jersey has addressed that need by legalizing sports betting and implementing the Garden State Growth Tax through the ACEA.

Non-Atlantic City destinations
driving growth in
Overnight Leisure visitors

Destination Market Share

Overall, the impact of New Jersey's visitation on the share of the US travel market was marked by positive success in 2018...after years of consistent decline. Among all its competitors, New Jersey's Overnight Leisure traveler segment captured the fifth largest shares of the US travel market in all four travel metrics – Stays, Person-Stays, Person-Days, and Trip-Dollars.

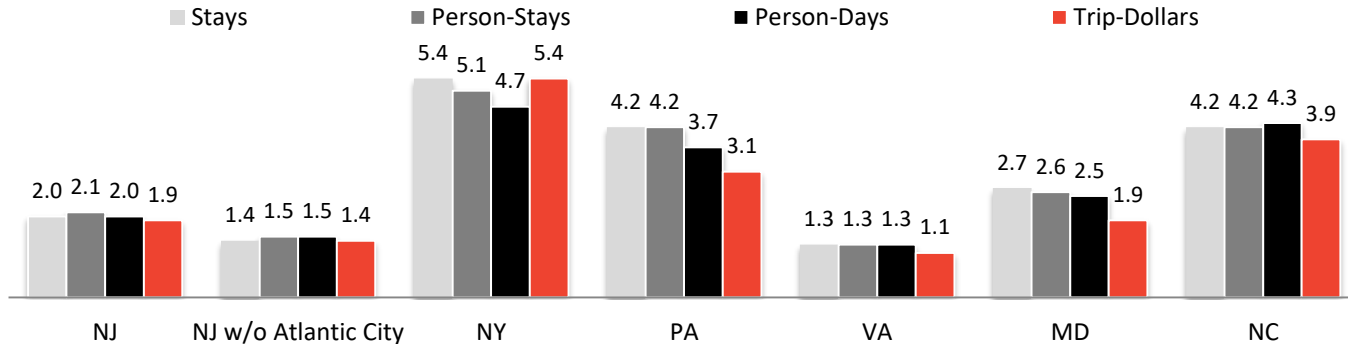
New Jersey's Overnight Leisure travel parties (or Stays) represent 2.02% of the US Overnight Leisure travel market. People often travel together with family, friends or with other groups. Thus, the Stays metric takes into account how many distinct groups of travelers came to the

destination.

In contrast, the number of Person-Stays taken to a destination indicates how many people came to your destination, but not how long they stayed. New Jersey's Overnight Leisure travelers (or Person-Stays), the main focus of this report, also represent 2.13% of the US Overnight Leisure travel market which is the result of the same average travel party size as the National level and/or the average travel party size on the US level increased or decreased at the same rate as the average travel party size of the New Jersey's Overnight Leisure market.

Market Share of U.S. Travel

OVERNIGHT LEISURE 2018 (%)



New Jersey gained market share in the Overnight Leisure segment in all four metrics – but is still behind most other competitors

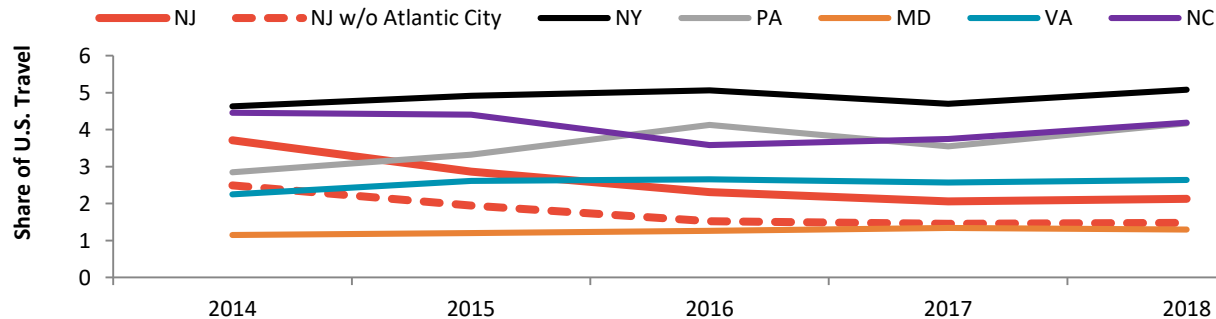
Destination Market Share

The Person-Days metric is simply the total number of days that visitors contributed to New Jersey. New Jersey's Overnight Leisure travelers represent 2.01% of the US Overnight market share. Despite the recovery over 2017, it represents a slightly lower share than in Person-Stays which can be attributed to changes in New Jersey number of visitors, changes in length of stay of these visitors, changes in party composition shares, and/or changes in the day/overnight mix relative to the US.

New Jersey Overnight Leisure travelers contributed the largest smallest of all four metrics in Trip-Dollars to the US Overnight Leisure market; 1.91% in terms of monetary worth of travelers as opposed to the contribution of number of trips or number of days spent in a destination.

Competitive Market Share

OVERNIGHT LEISURE PERSON-STAYS (%)



Changes in Direct Spending can not only be influenced by ALL other travel measures including number of travel parties, number of persons, number of days, number of people in the Stays, length of stay, and individual traveler spending but also be related to changes in travel party composition, purpose of trip, activity participation levels, or accommodation choice.

New Jersey's overall market share of Overnight Leisure visitors increased to 2.13% in 2018. Despite the increase, New Jersey remains at 5th place among the competition. 2018 marked the first increase in market share for New Jersey since 2014.

Among New Jersey's competitors, all States, except Maryland, saw increases in market share in 2018. Pennsylvania remained at 3rd place for largest travel share among the competition, while the rest maintained their relative positions as well.

Atlantic City contributes about 1/4th (Person-Stays and Person-Days) to 1/3rd (Stays and Trip-Dollars) of New Jersey's market shares

Who are New Jersey’s Overnight Leisure visitors?

New Jersey’s visitors can be described in three ways; basic demographics, lifestages and by generation. Overall, the demographic make-up of travelers to New Jersey has been somewhat different over the last time periods.

In 2018, the average age and generational composition of visitors to the State are shaped by Atlantic City’s mature visitors. However, New Jersey welcomes slightly older travelers than the US which is not only reflected in higher shares of Boomers and Silent/GenI, but also in higher shares of travelers who are never married and retired.

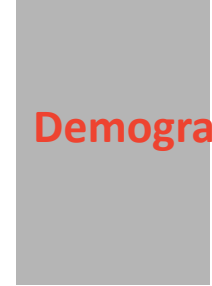
New Jersey is now less likely than the average U.S.

destination to host guests with children in their travel party. This may be due to the increasing number of GenX travelers visiting the average U.S. destination while the number of GenX travelers to New Jersey has decreased in 2018.

Average incomes of New Jersey visitors decreased in 2018 but are still consistently higher than visitors to the average U.S. destination or those visiting the Competitive Set. Incomes of those visiting destinations other than Atlantic City for Overnight Leisure stays have decreased as well.

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 (years)	51	49	50	50
Employed	57%	61%	63%	62%
Retired	28%	23%	25%	24%
Average Income (000)	\$110.8	\$110.6	\$104.0	\$106.0
Children in HH	34%	39%	37%	37%
Children in Travel Party	17%	19%	18%	17%
Generations:				
Millennial (1981+)	27%	30%	27%	25%
GenX (1965-1980)	24%	27%	30%	32%
Boomer (1946-1964)	41%	37%	36%	36%
Silent/GenI (1945 back)	8%	6%	7%	8%



Non-Atlantic City Visitors . . .
Younger
Employed
Include Kids in Travel Party

Demographics

DK Shifflet 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.

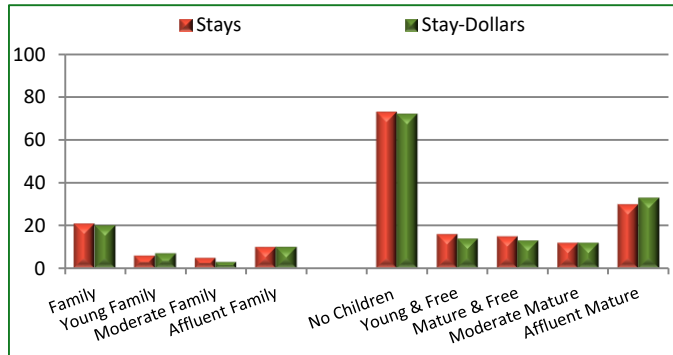
Visitors are more likely to belong to Lifestages with no children in the household for New Jersey, with and without Atlantic City included. It is important to notice, however, that where the share of Stay-Dollars is less than the share of Stays these Lifestages are less valuable for the State. The Affluent Mature Lifestage is the most profitable segment, just beating out the Moderate Mature Lifestage for the State excluding Atlantic City...the only profitable segments.

DK Shifflet 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

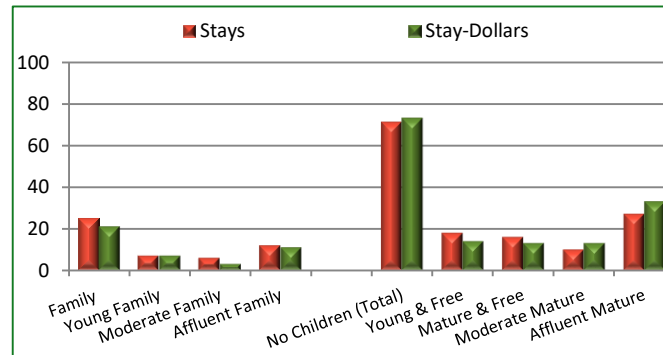
New Jersey

OVERNIGHT LEISURE (%) (2016-2018)



New Jersey without Atlantic City

OVERNIGHT LEISURE (%) (2016-2018)



Affluent Mature:
Most profitable
Largest share of travel party

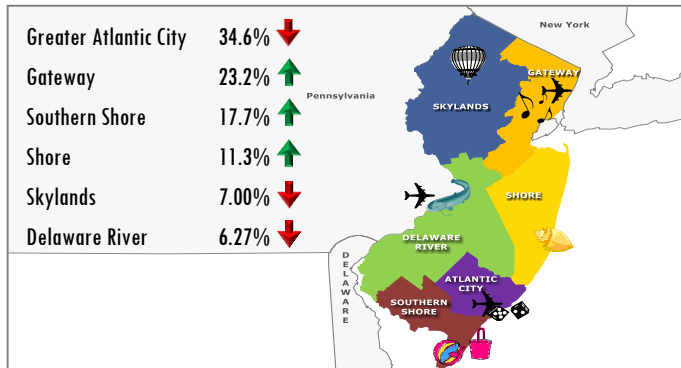
Where do New Jersey's visitors come from?

Eight out of 10 New Jersey visitors come from 7 states with about 21% coming from New Jersey itself and an additional 45% 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 car and those travel an average one-way distance of 190 miles – the lowest among the average U.S. destination and New Jersey's competitors. Six out of ten travelers live in a vicinity of less than 100 miles. It is interesting to note that trains are used at almost the same rate as airplanes for travel to New Jersey, which is not the case for the average U.S. destination.

New Jersey Destination Regions

OVERNIGHT LEISURE PERSON-STAYS (%) (2018)



New Jersey Origin States

OVERNIGHT LEISURE PERSON-STAYS (%) (2018)

Pennsylvania	23.1%
New York	22.2%
New Jersey	20.6%
Maryland	4.6%
Connecticut	3.8%
Florida	3.6%
North Carolina	3.1%
Other	8.9%

Where do New Jersey's visitors go?

The Greater Atlantic City Region saw a continued decrease in 2018 despite receiving the largest share of New Jersey's Overnight Leisure visitors.

The Southern Shore and Shore regions experienced slight increases in visitation in 2018, while the Skylands and Delaware River saw decreases in visitation. This may be due to the ACEA's recent collaboration with its Cape May County tourism partners to promote Atlantic county to a wider audience.

66% of New Jersey visitors come from the tri-state area

Travel Purpose

Why do travelers visit New Jersey?

Visiting Friends or Relatives and Getaway Weekends each account for over one quarter of Overnight Leisure visitors to New Jersey in 2018. However, if Atlantic City is excluded, Getaway Weekends drop significantly and the overwhelming reason for Overnight Leisure travel becomes to Visit Friends or Relatives.

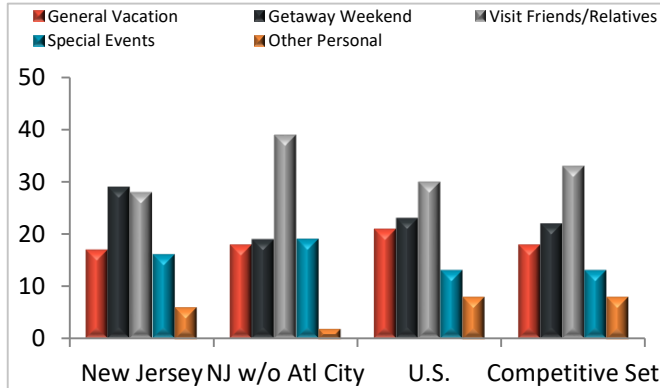
Although Purpose of Travel remained stable in 2018, Special Events continued to increase and Overnight Leisure travelers to New Jersey without Atlantic City still mimic the behaviors of Overnight Leisure visitors traveling to destinations within the Competitive Set.

Visitors attending Special Events increase when Atlantic City is excluded, but the share of those taking longer vacations is similar regardless of whether or not Atlantic City is included in the analysis.

In 2018 visitors spent on average \$114 in New Jersey per person per day - with increases in transportation, food, and entertainment and decreases in shopping and lodging over 2017. Atlantic City is driving the average daily spending for the State. Again demonstrating the value of the Atlantic City area.

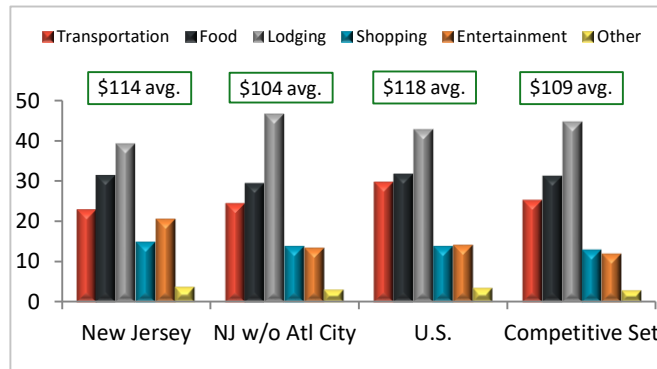
Purpose of Travel

OVERNIGHT LEISURE PERSON-STAYS (%) (2018)



Per-Person-Per-Day Spending

OVERNIGHT LEISURE PERSON-DAYS (%) (2018)



Atlantic City area drives
Weekend Getaways
and Spending

What type of accommodations do they stay in?

66% of Overnight Leisure visitors to New Jersey stayed in paid accommodations in 2018, which is similar to the US and the Competitive Set. Another 3 out of 10 travelers stay in Non-Paid accommodations, i.e. with Friends & Relatives.

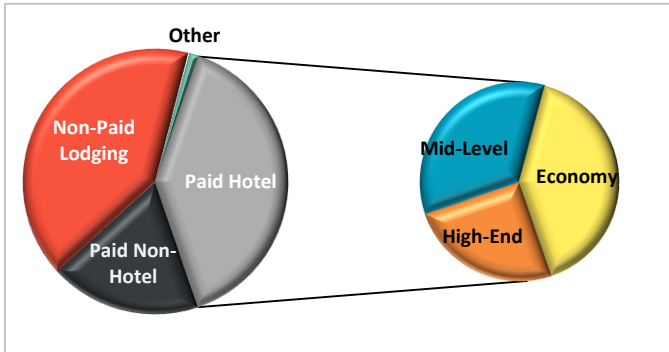
The percentage of visitors staying in paid hotels drops from 51% to 35% when Atlantic City is excluded from the analysis, which makes it clear that the Atlantic City is driving the large number of hotel stays in the State. Among Hotel stayers in New Jersey, they prefer economy and other hotels (especially when staying in Atlantic City) over high-end hotels. Compared to the average US and

competing States, New Jersey provides fewer mid-level accommodation opportunities – in Atlantic City as well as the rest of the State.

New Jersey's hotel guests report high ratings for Satisfaction (8.4), Staff/Service (8.3), and Value-for-the-Money (8.2) – on par with the average US and its competitors. All of New Jersey's guest ratings recovered from the short-lived decline in 2017. Overall, the State's hotels compete well in keeping Paid Hotel guests happy but need to monitor especially Staff/Service ratings.

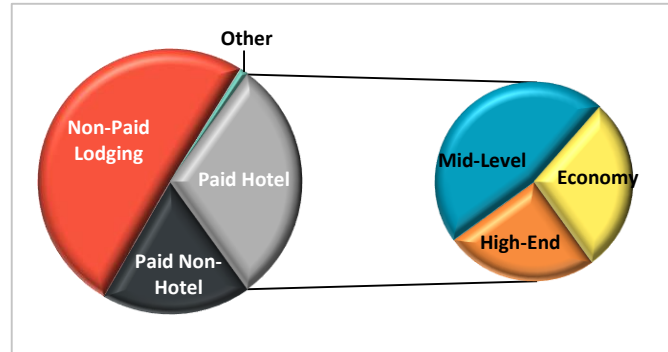
New Jersey

OVERNIGHT LEISURE PERSON-STAYS (%) (2018)



New Jersey without Atlantic City

OVERNIGHT LEISURE PERSON-STAYS (%) (2018)



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

Party Composition/Stay Length

Who do they travel with? How long do they stay?

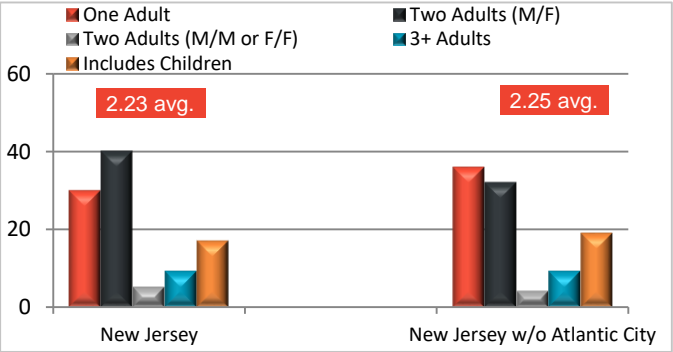
Travel parties consisting of one or two adults account for three-quarters of New Jersey's Overnight Leisure travel.

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

This is reflected in the average travel party size. At 2.23 persons, New Jersey's travel party average is slightly larger than the Competitive Set (2.08 persons). If we exclude Atlantic City, the average size increases to 2.25 persons.

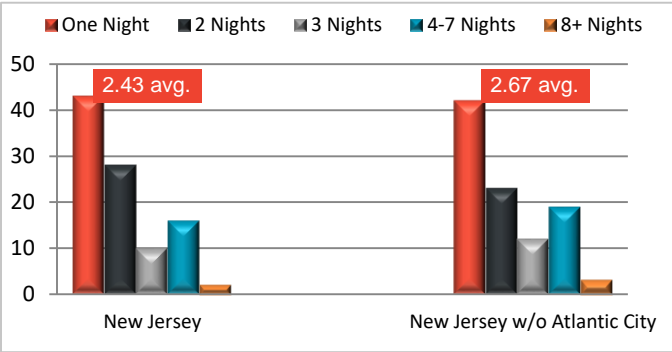
Travel Party Composition

OVERNIGHT LEISURE STAYS (%) (2018)



Stay Length

OVERNIGHT LEISURE STAYS – (1+ NIGHTS) (%) (2018)



Among Overnight Leisure visitors, New Jersey travel parties stay 2.43 nights on average. Excluding Atlantic City with its many Weekend Getaway travelers results in a higher 2.67 nights length of stay – the longest among all competitors.

The average length of stay declined steadily since 2016.

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

Activities

What do New Jersey visitors do?

Nine out of ten Overnight Leisure travel parties participate in an activity when visiting the State.

Overnight Leisure travel parties who visit New Jersey participated in the following top five activities in 2018:

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 2017, however Culinary/Dining and Gambling decreased slightly Shopping increased substantially.

When excluding Atlantic City, the top five activities change slightly and Gambling drops to place 25 in 2018:

1. Beach/ Waterfront
2. Visiting Friends and Relatives
3. Culinary/Dining Experience
4. Shopping
5. Holiday Celebration

New Jersey's Overnight Leisure travel parties (including Atlantic City) have a much higher propensity to participate in the following activities than travel parties to the average US destination:

- Gambling (3.8 times as high)
- Wedding (2.2 times)
- Bicycling (2.2 times)
- Beach/Waterfront (2.2 times)
- Real Estate (buy/sell) (2.0 times)
- Live Music (1.7 times)
- Spa (1.7 times)
- Holiday Celebration (1.7 times)
- Nightlife (1.5 times)
- Religious Faith Based Conference (1.5 times)

New Jersey's Overnight Leisure travel parties' (excluding Atlantic City) propensity:

- Wedding (3.0 times as high)
- Bicycling (3.0 times)
- Real Estate (buy/sell) (2.9 times)
- Holiday Celebration (2.2 times)
- Religious/Faith Based Conference (2.1 times)
- Reunion/Graduation (2.0 times)
- Beach/Waterfront (1.9 times)
- Water Sports (1.9 times)
- Theme/Amusement Park/ Water Park (1.7 times)
- Show: Boat, Car, Home (1.7 times)

New Jersey can position itself as a destination for Family, Attraction and Nature-based activities

The rest of New Jersey without Atlantic City can position itself as a destination for Family, Nature and Culture-based activities

Satisfaction and Value

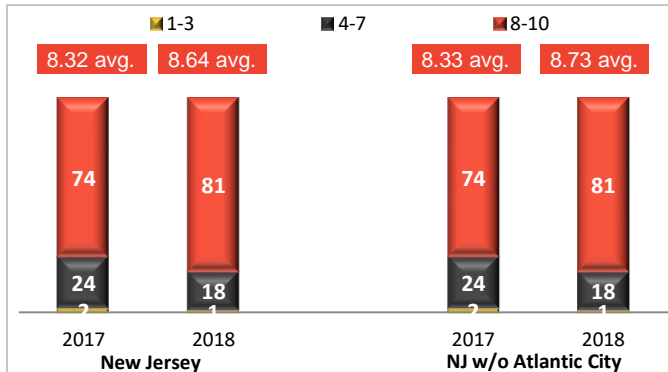
How do New Jersey visitors rate the State?

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

Overnight Leisure visitors report strong satisfaction (8.64 average rating) with their New Jersey stay in 2018. 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. Excellent satisfaction ratings for New Jersey, whether or not Atlantic City is included, had sizeable increases in 2018 to 8.64 (New Jersey whole) and 8.73 (New Jersey without Atlantic City).

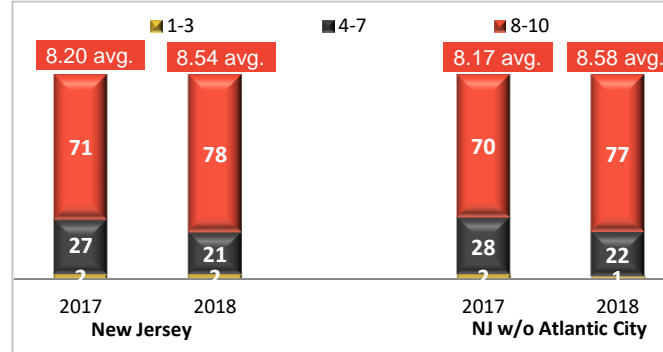
Overall Satisfaction

OVERNIGHT LEISURE PERSON-STAYS (%) (2018)



Value for the Money

OVERNIGHT LEISURE PERSON-STAYS (%) (2018)

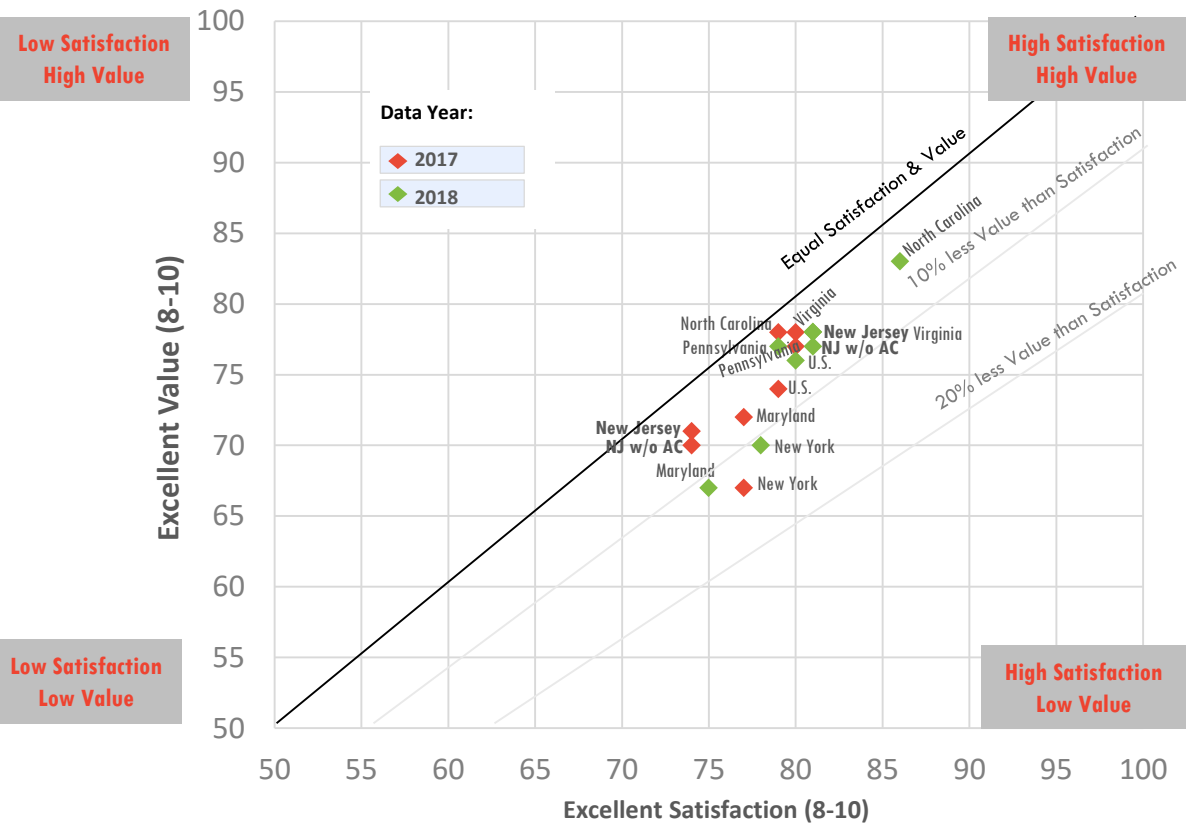


Overall, New Jersey's Overnight Leisure travelers report next highest rating for value-for-the-money (8.54), followed by Likelihood-to-recommend (8.52), Friendly/Helpful people (8.50) and Feeling of Safety (8.46). All ratings increased to all-time highs in 2018.

When excluding Atlantic City, visitors rate New Jersey higher in every performance attribute.

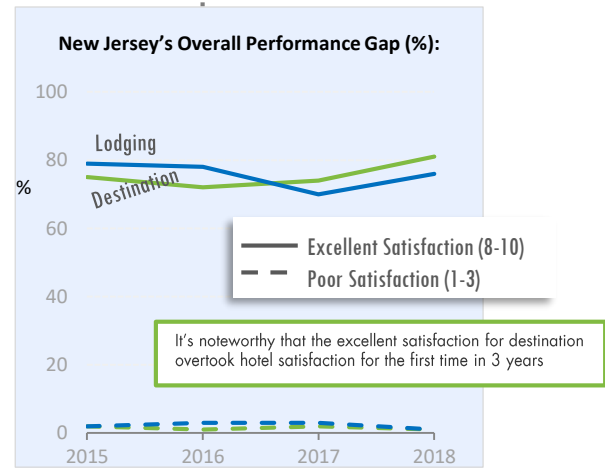
Satisfaction and Value
Strong

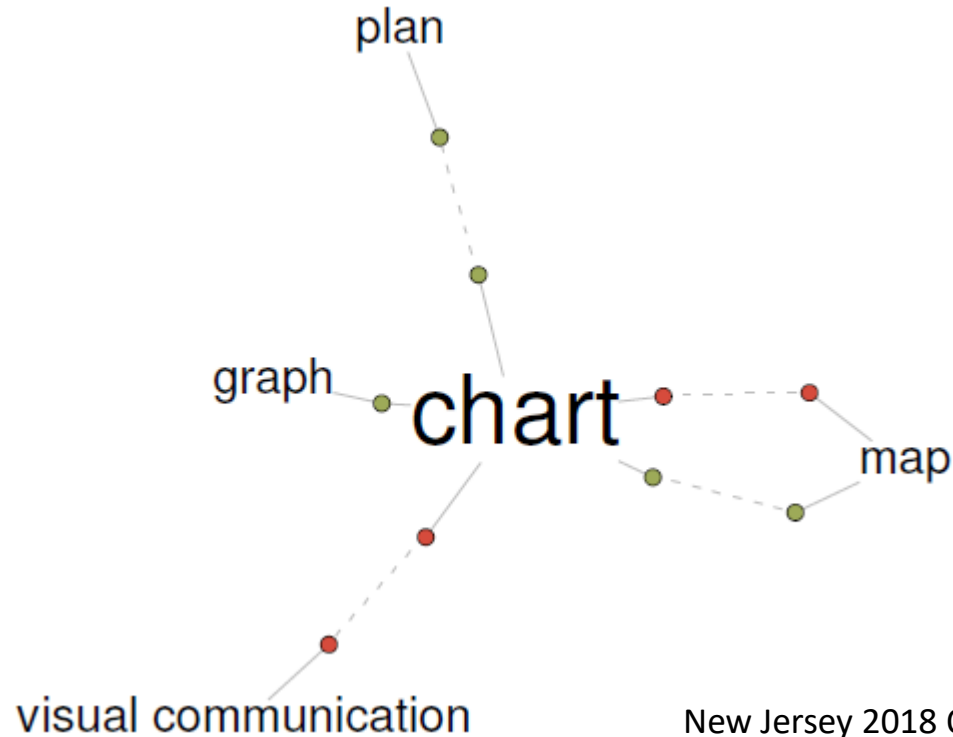
Performance Ratings



Satisfaction and Value ratings may be combined into a matrix which places each destination in the location where Satisfaction and Value intersect.

Destinations or segments fall into one of four quadrants. Those that are in the High Satisfaction/ High Value quadrant have the most loyal visitors. Those visitors are most likely not only to return, but they are likely to spend more, as well as provide invaluable word-of-mouth recommendations. The graph to the left shows these data for New Jersey, New Jersey without Atlantic City and the Competitive Set as well as the US average.





Charts and Graphs

New Jersey 2018 Overnight Leisure Visitor Profile

U.S. Travel Segments

VOLUME

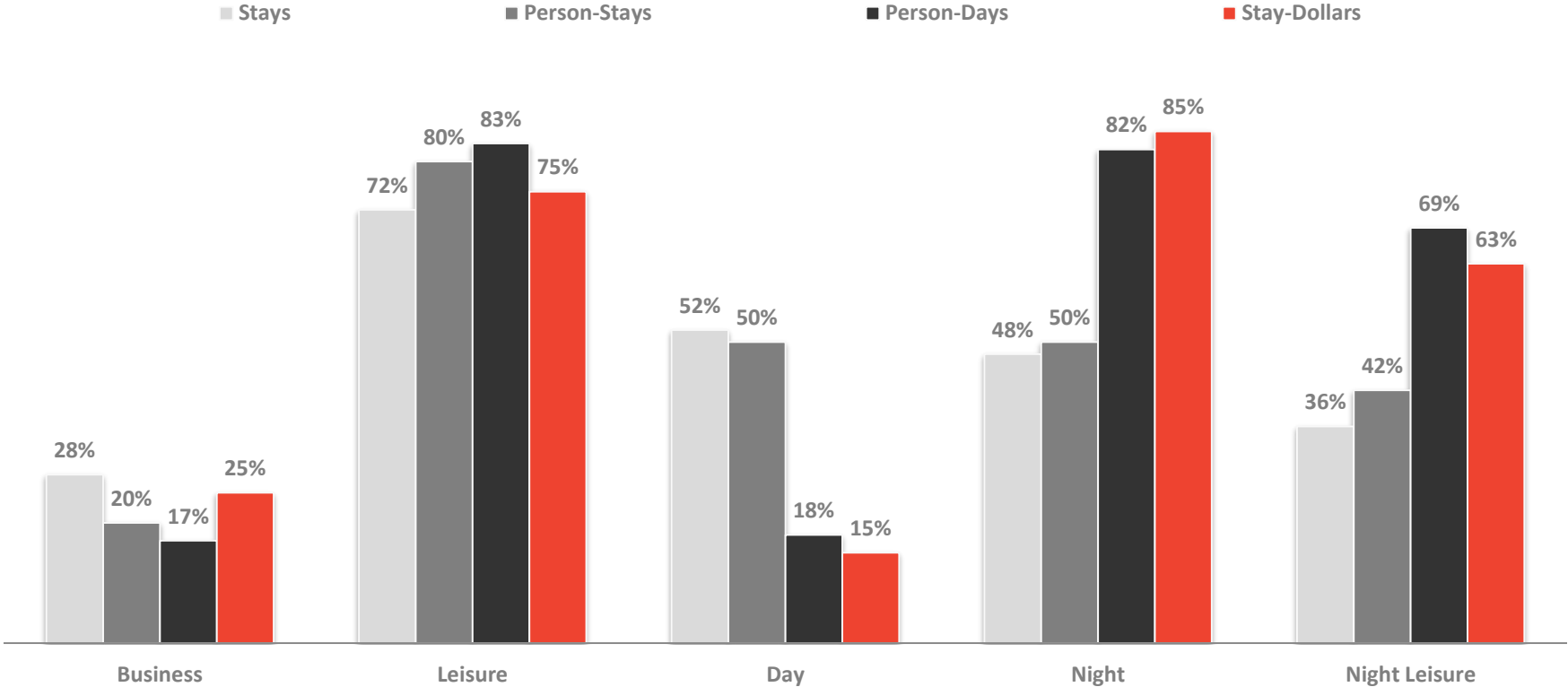


Chart 1 • Segment: 2018 Total Volume (%)

New Jersey Travel Segments

VOLUME

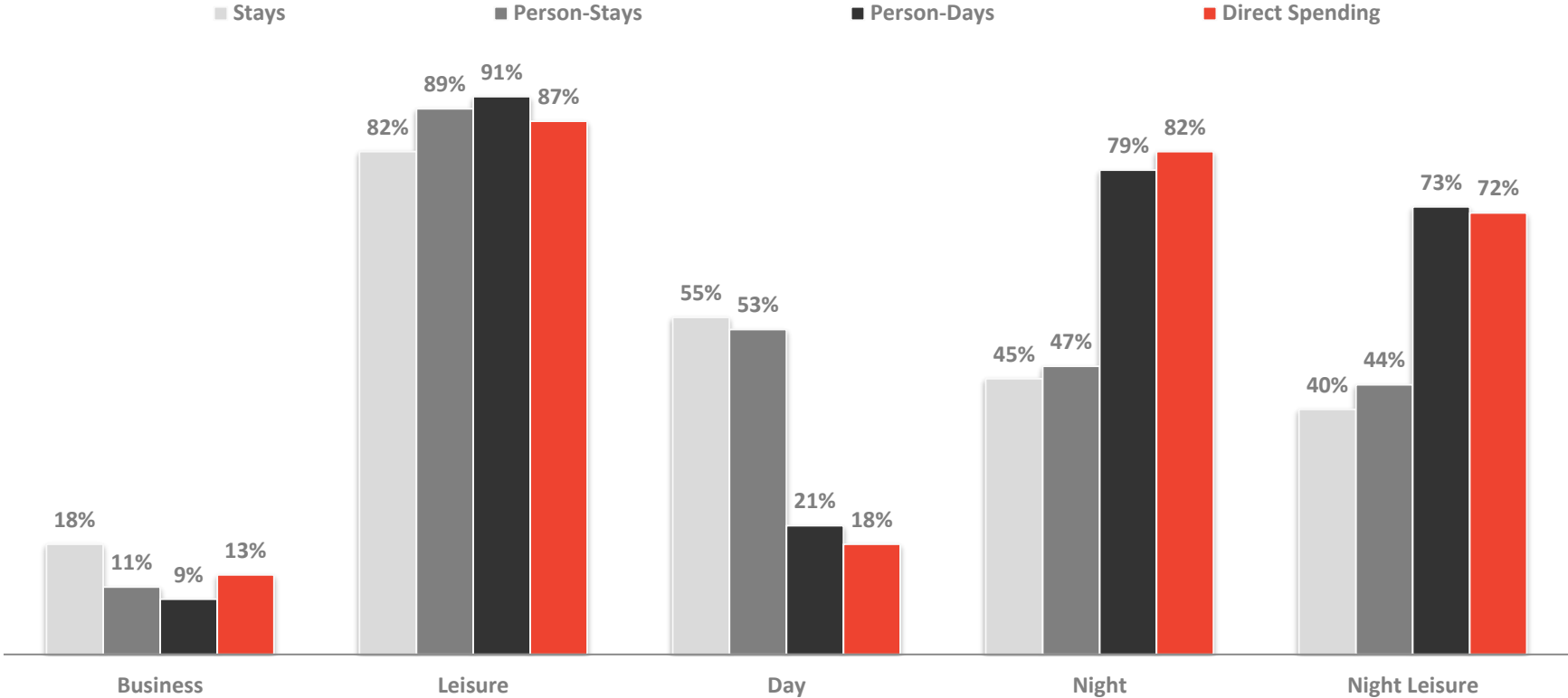


Chart 3 • Segment: 2018 Total Volume (%)

New Jersey Person-Stays Volume

VOLUME

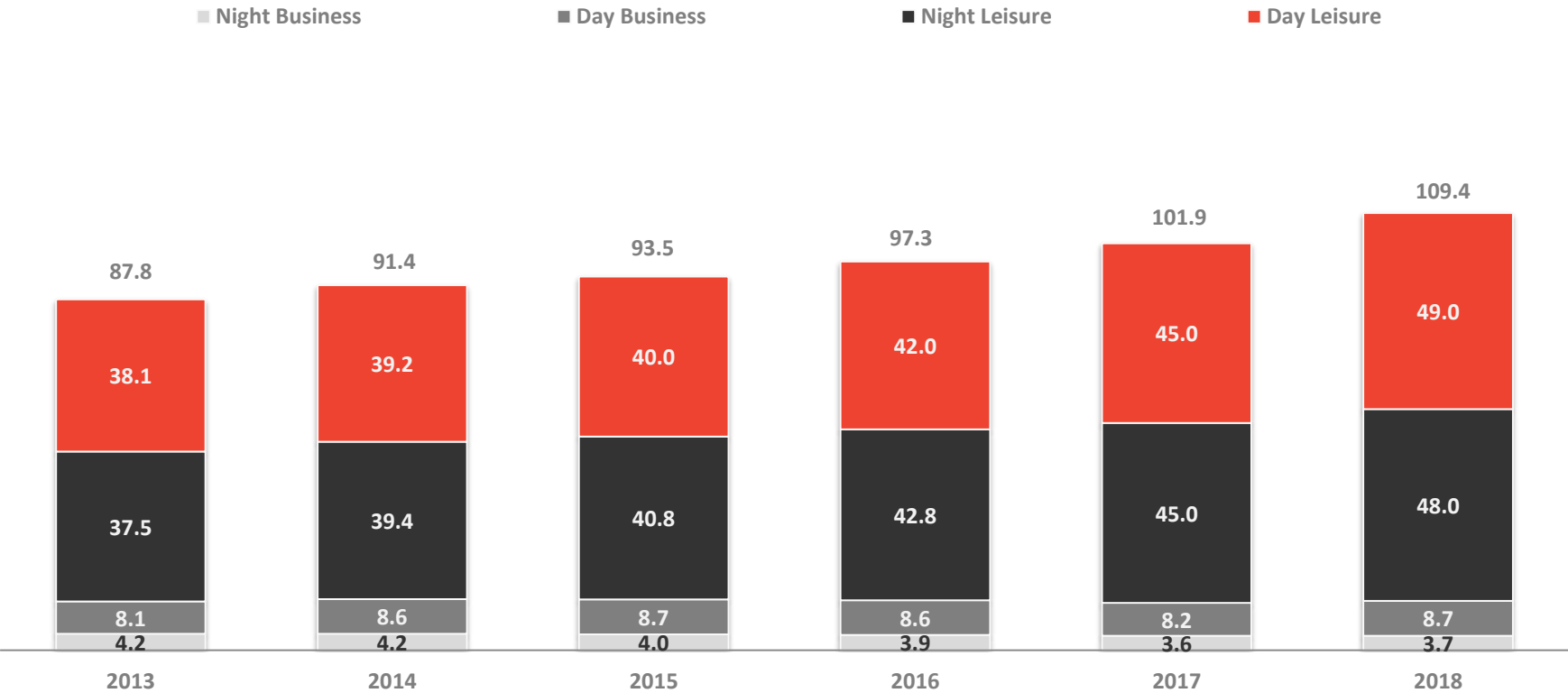


Chart 4 • in Millions

New Jersey Person-Stays Volume

VOLUME

New Jersey						U.S.
	14/13	15/14	16/15	17/16	18/17	18/17
Total	4.1%	2.3%	4.0%	4.7%	7.4%	3.1%
Business	4.6%	-0.4%	-1.8%	-5.4%	4.7%	0.3%
Leisure	4.0%	2.8%	4.9%	6.2%	7.7%	3.8%
Day	3.6%	2.0%	3.8%	5.1%	8.6%	3.5%
Night	4.6%	2.7%	4.3%	4.2%	6.1%	2.8%
Day Business	7.0%	1.4%	-1.1%	-4.8%	6.2%	-0.5%
Day Leisure	2.8%	2.2%	4.9%	7.1%	9.0%	4.7%
Night Business	0.0%	-4.2%	-3.2%	-6.7%	1.5%	1.4%
Night Leisure	5.1%	3.4%	5.0%	5.2%	6.5%	3.0%

Chart 5 • % change

New Jersey Direct Spending Volume

DIRECT SPENDING

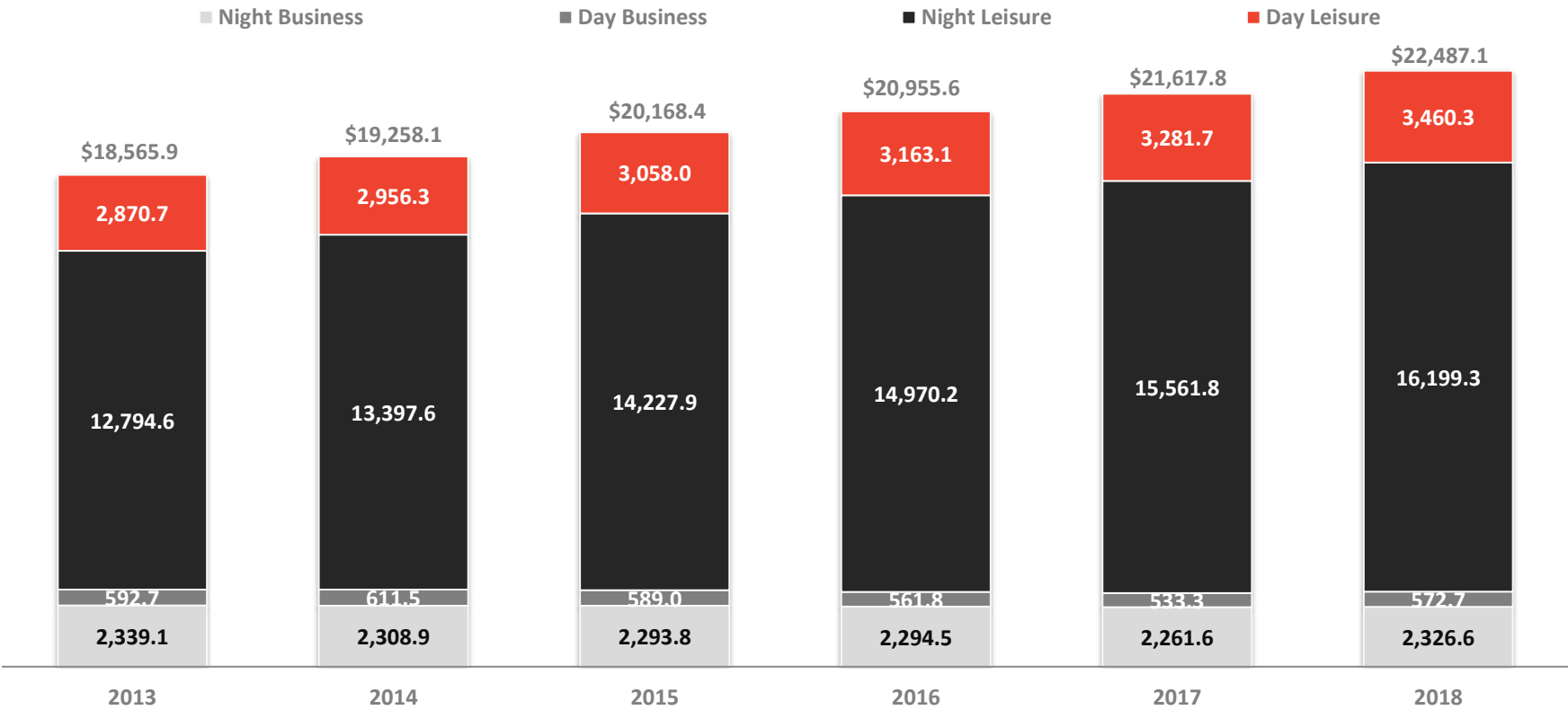


Chart 6 • \$ Millions

New Jersey Direct Spending Volume

DIRECT SPENDING

New Jersey						U.S.
	14/13	15/14	16/15	17/16	18/17	18/17
Total	3.7%	4.7%	3.9%	3.2%	4.0%	4.5%
Business	0.1%	-0.7%	-2.1%	-1.7%	1.9%	5.8%
Leisure	4.4%	5.7%	4.9%	3.9%	4.3%	4.1%
Day	3.0%	2.2%	2.1%	2.4%	5.7%	8.5%
Night	3.9%	5.3%	4.3%	3.3%	3.7%	3.9%
Day Business	3.2%	-3.7%	-4.6%	-5.1%	7.4%	9.3%
Day Leisure	3.0%	3.4%	3.4%	3.8%	5.4%	8.3%
Night Business	-0.7%	0.0%	-1.4%	-0.9%	0.6%	5.3%
Night Leisure	4.7%	6.2%	5.2%	4.0%	4.1%	3.4%

Chart 7 • % change

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

MARKET SHARE

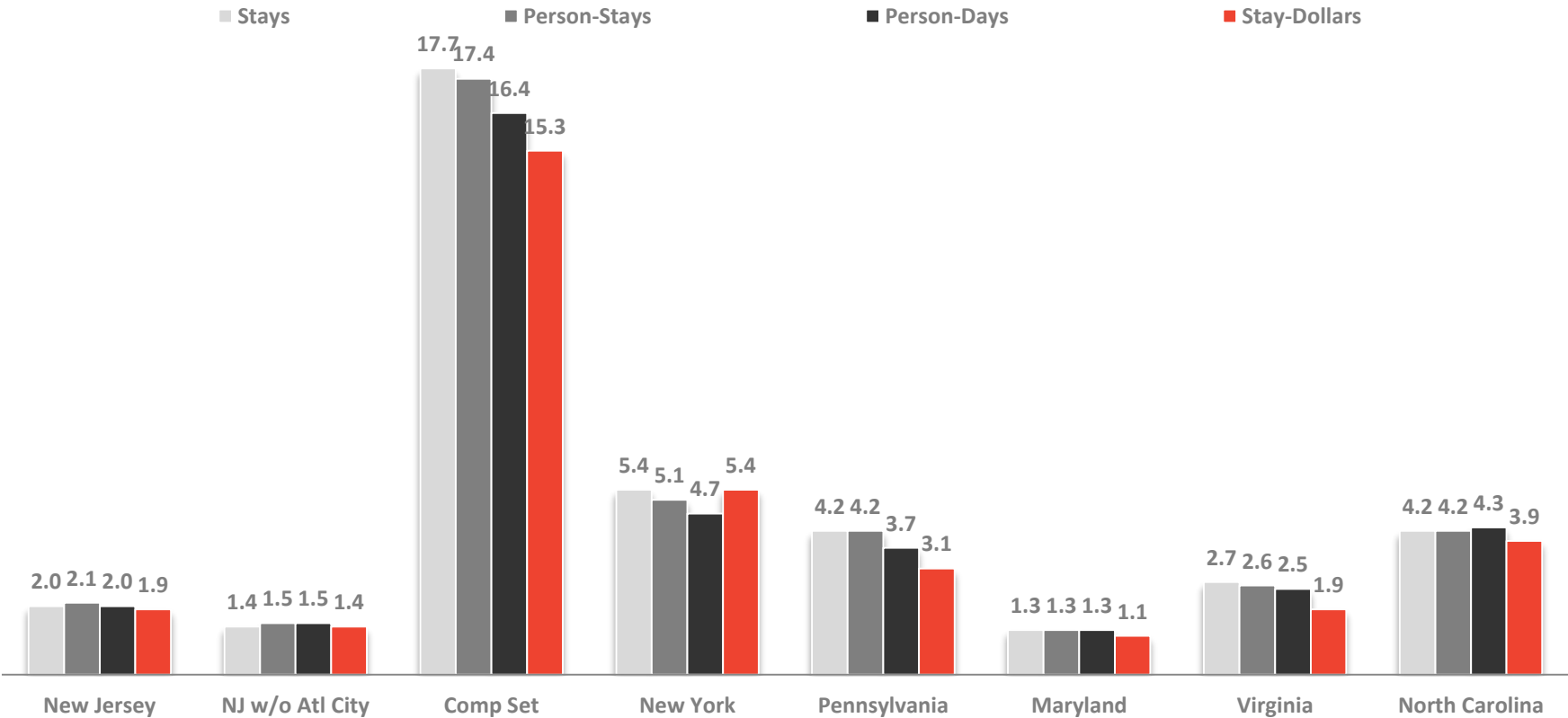


Chart 8 • Segment: 2018 Overnight Leisure (%) • New Jersey n = 825 household count

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

DEMOGRAPHICS

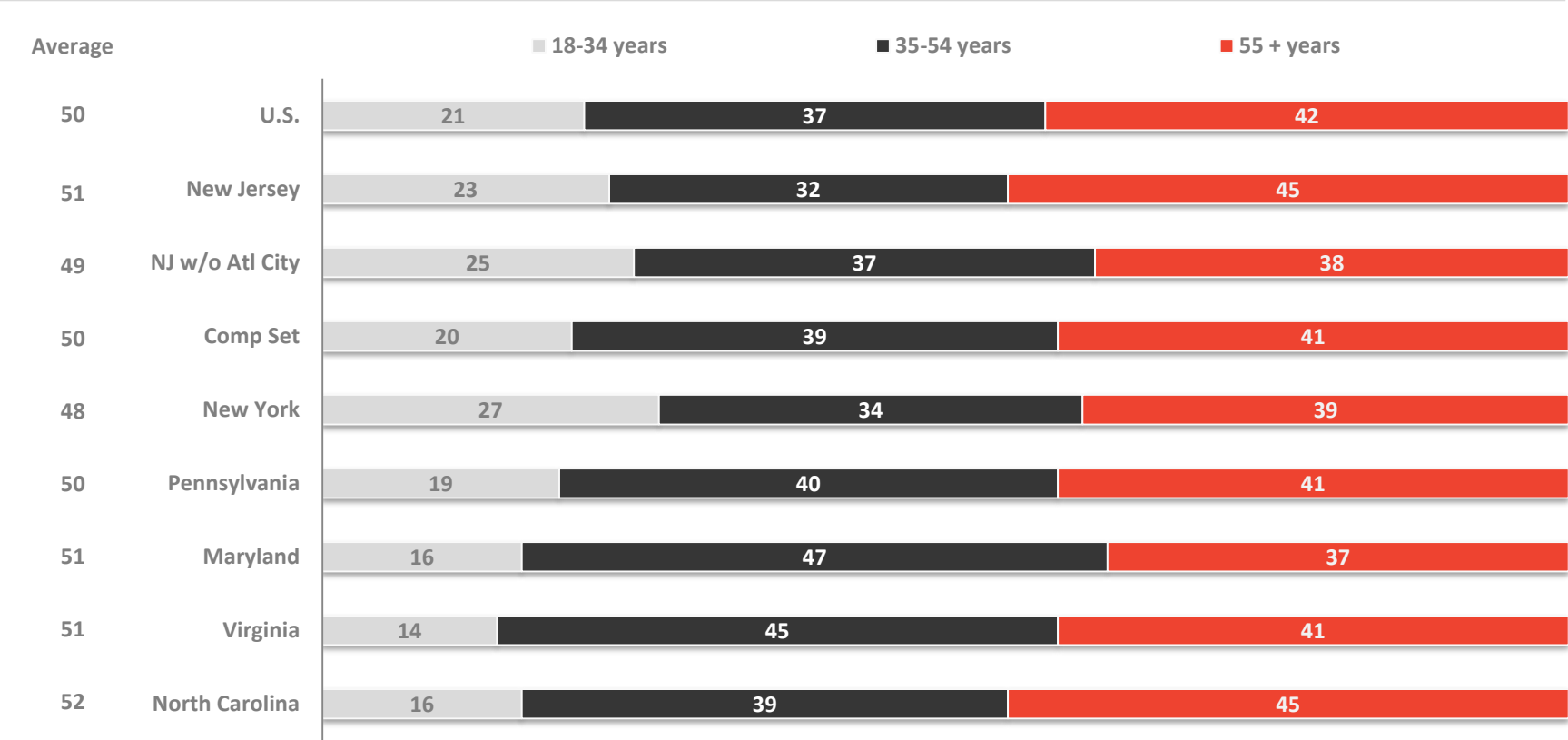


Chart 9 • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 household count

New Jersey Avg. Party per Stay Spending by Age

DEMOGRAPHICS

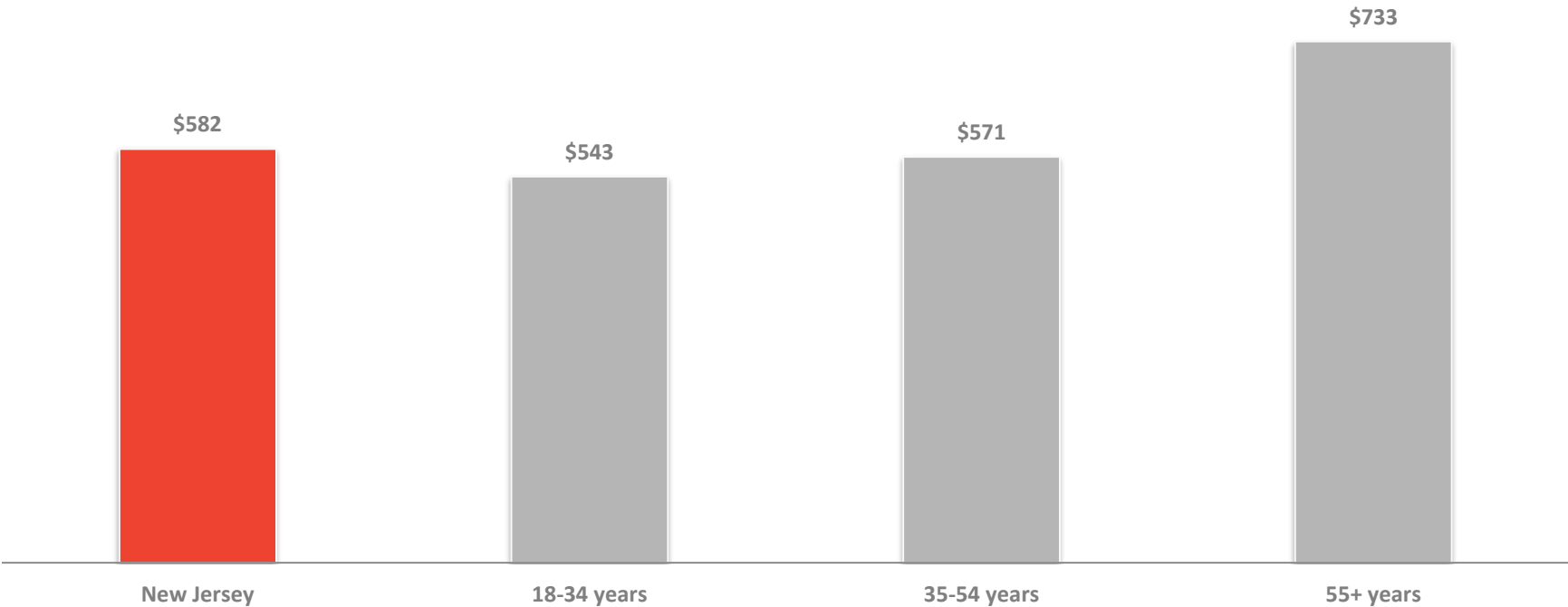


Chart 10 • Segment: 2016-2018 Overnight Leisure Stays (\$) • New Jersey n = 2,914 household count

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

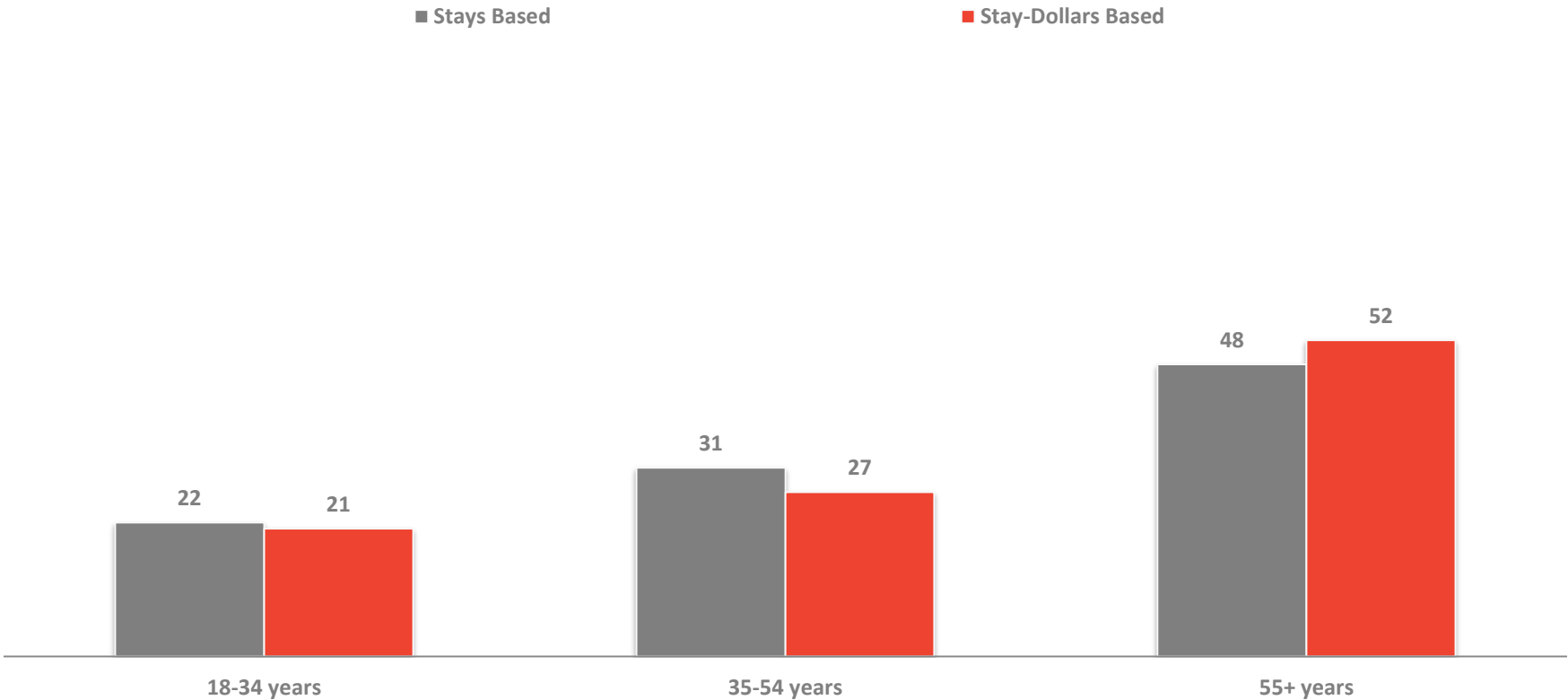


Chart 11 • Segment: 2016-2018 Overnight Leisure (%) • New Jersey n = 2,914 household count

Racial Distribution

U.S., New Jersey and Comp Set

DEMOGRAPHICS

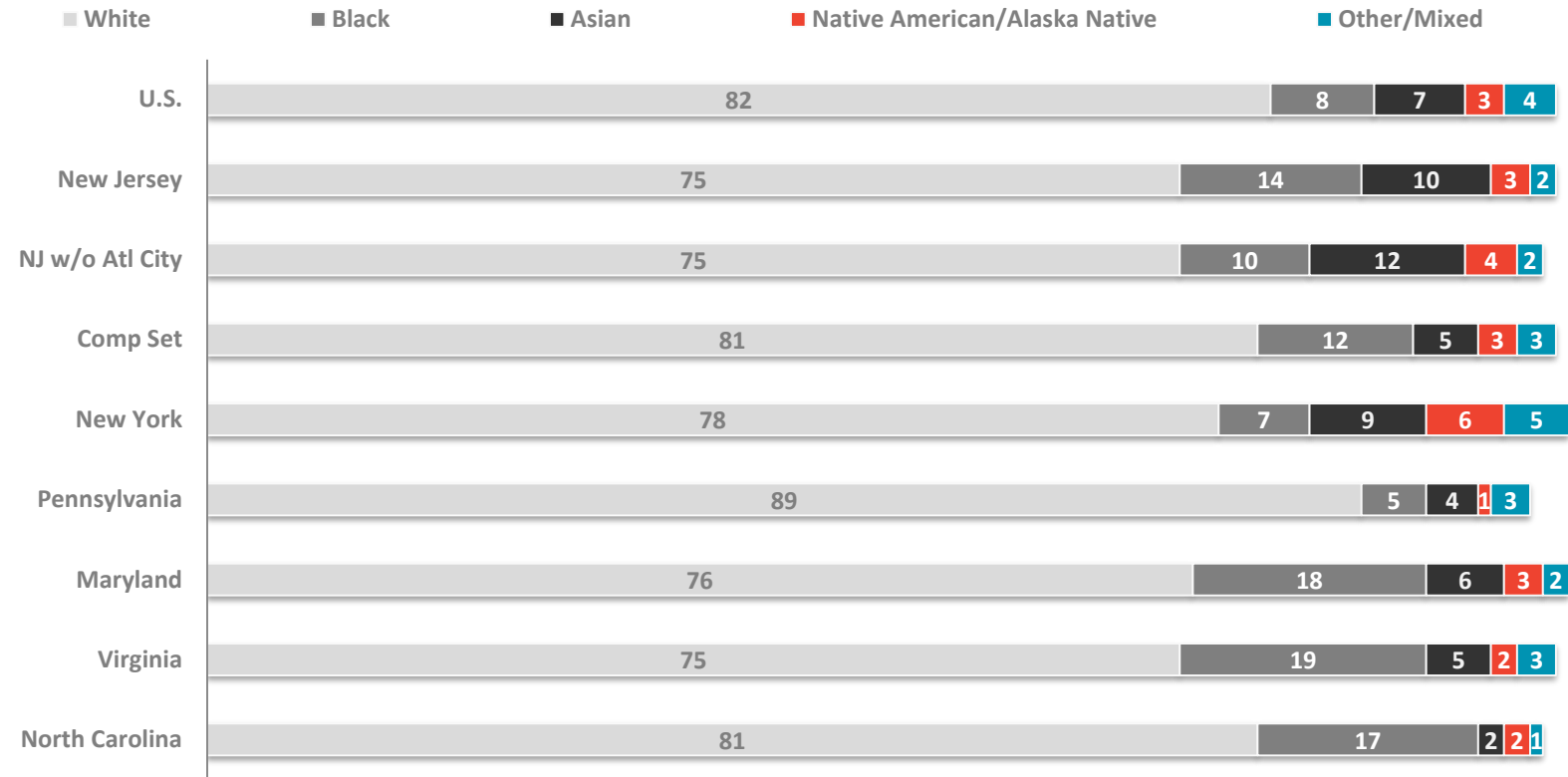


Chart 12a • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 household count
^Note: The total may add to more than 100% due to multiple responses

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

DEMOGRAPHICS

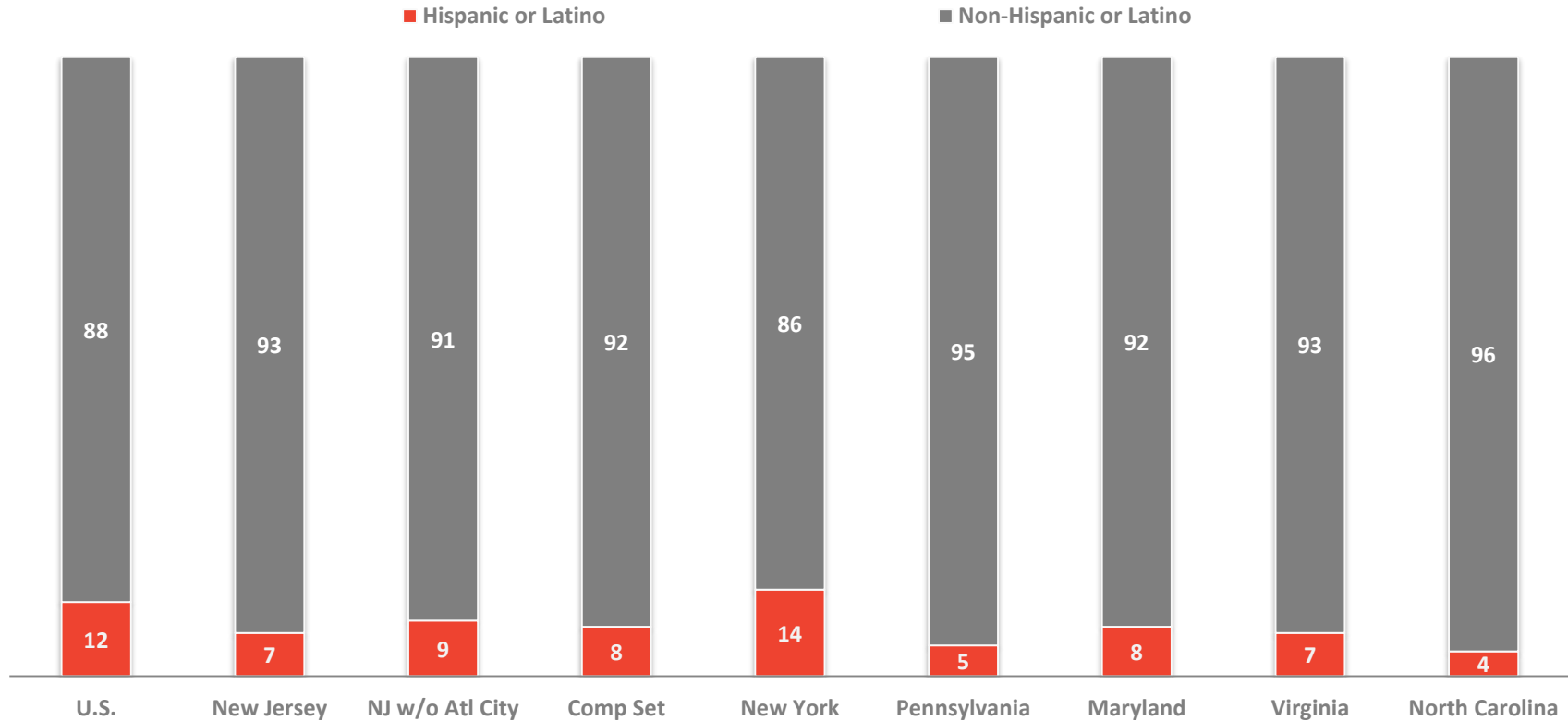


Chart 12b • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 household count

Sexual Orientation: U.S., New Jersey and New Jersey w/o Atlantic City

DEMOGRAPHICS

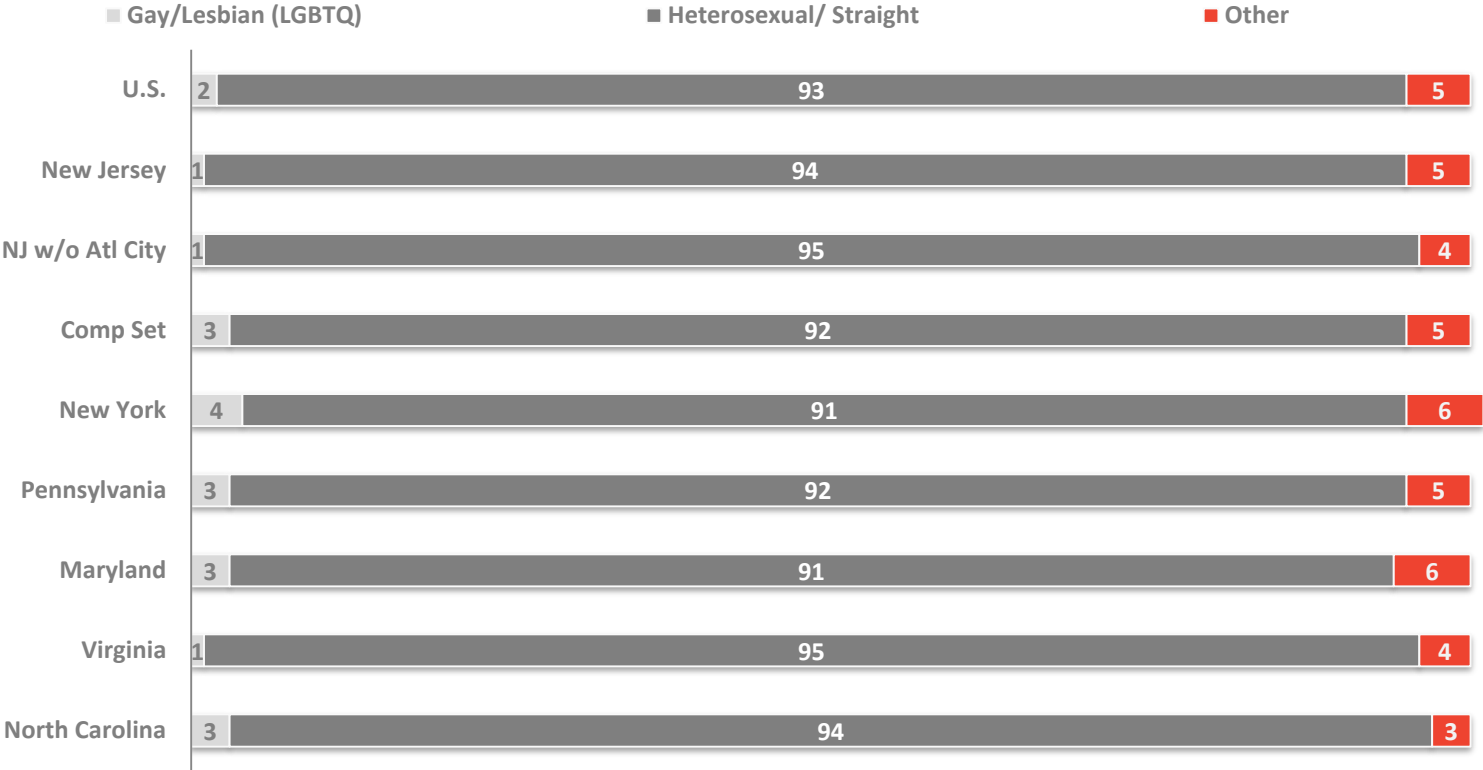


Chart 13 • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 household count

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

DEMOGRAPHICS

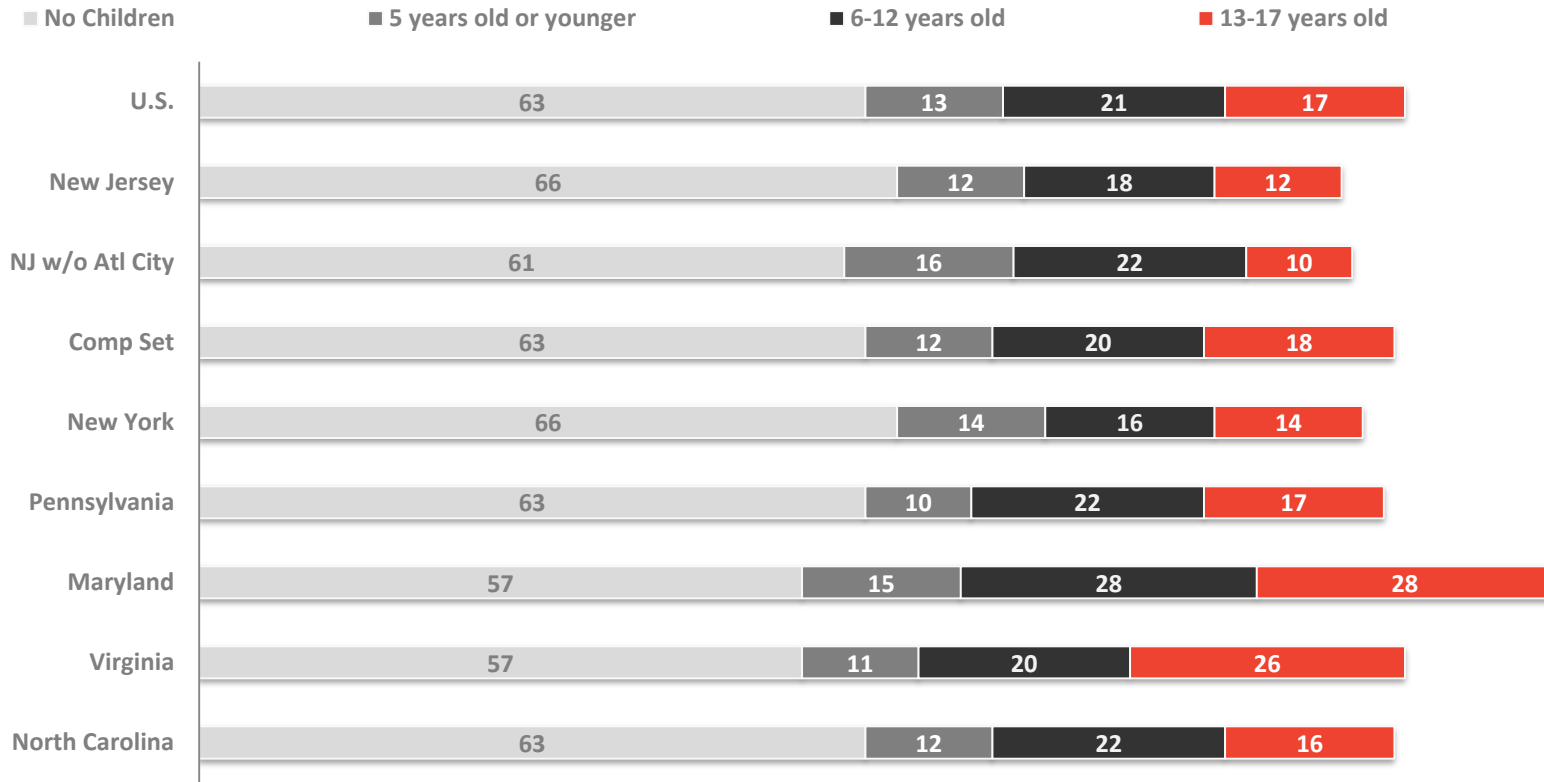


Chart 14 • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 household count

GLOSSARY

Sum exceeds 100% due to multiple-children households.

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

DEMOGRAPHICS

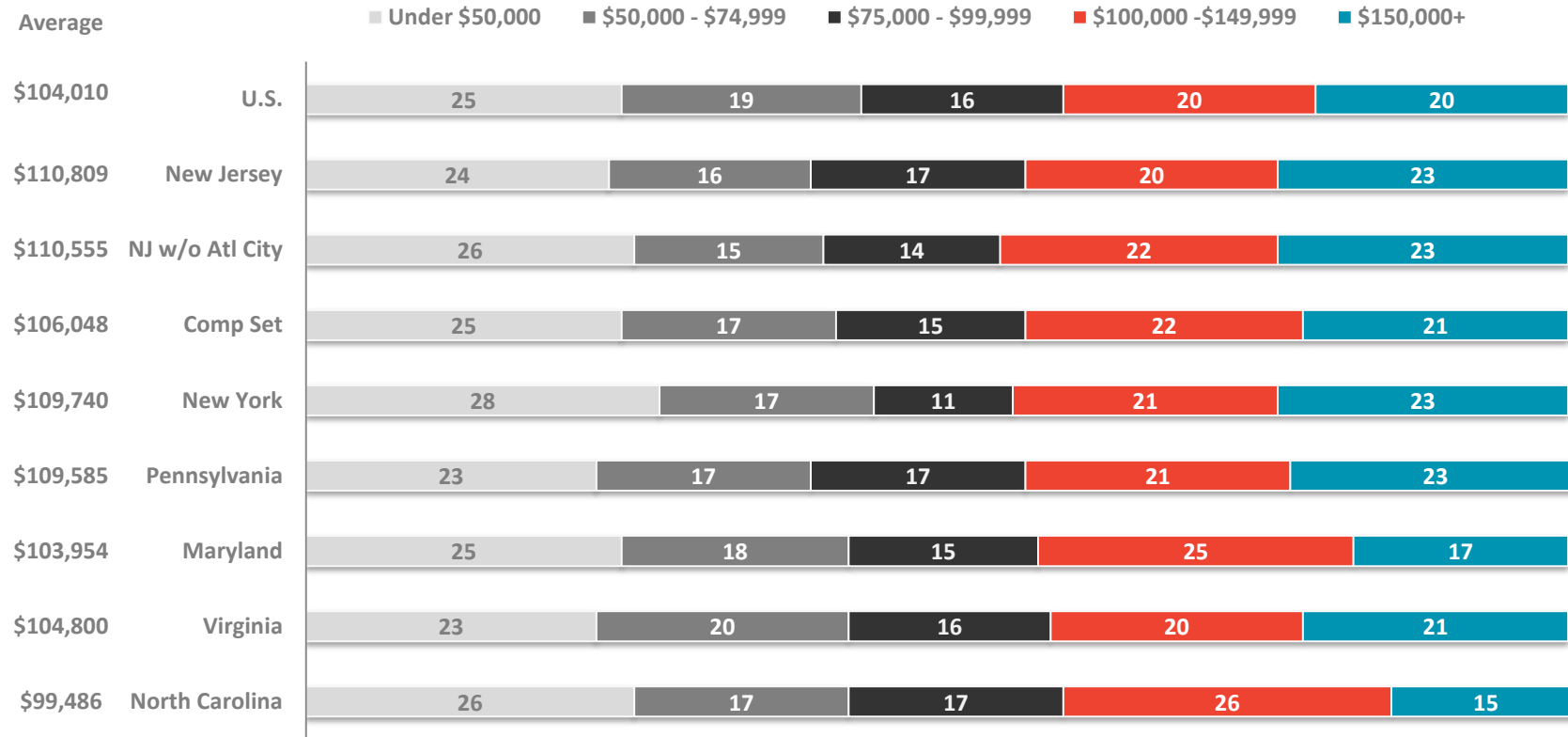


Chart 15 • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 household count

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

DEMOGRAPHICS

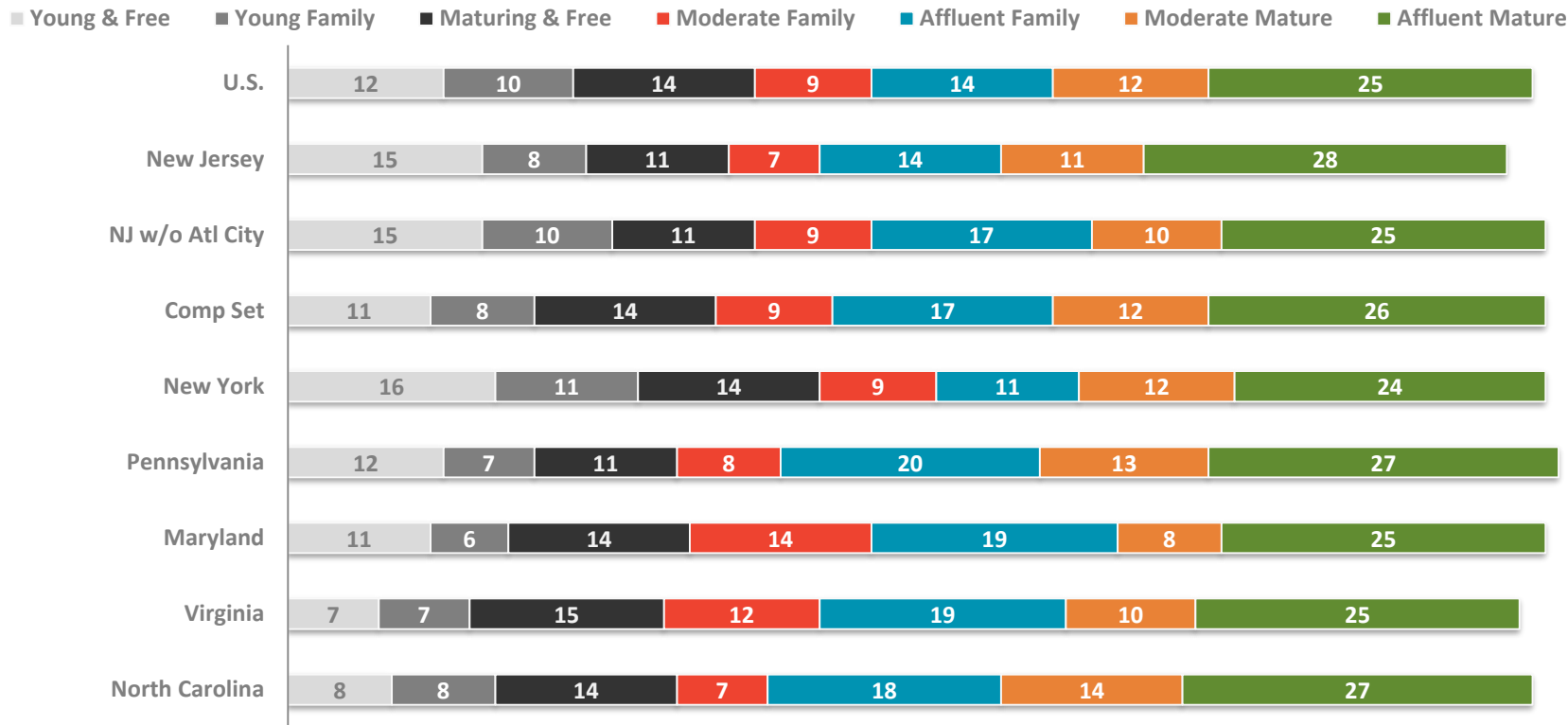


Chart 16 • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 household count

^Note: The total may add to less than 100% due to non-responses

New Jersey Avg. Party per Stay Spending by Lifestage

DEMOGRAPHICS



Chart 17 • Segment: 2016-2018 Overnight Leisure Stays (\$) • New Jersey n = 2,914 household count

New Jersey Lifestage Comparison

DEMOGRAPHICS

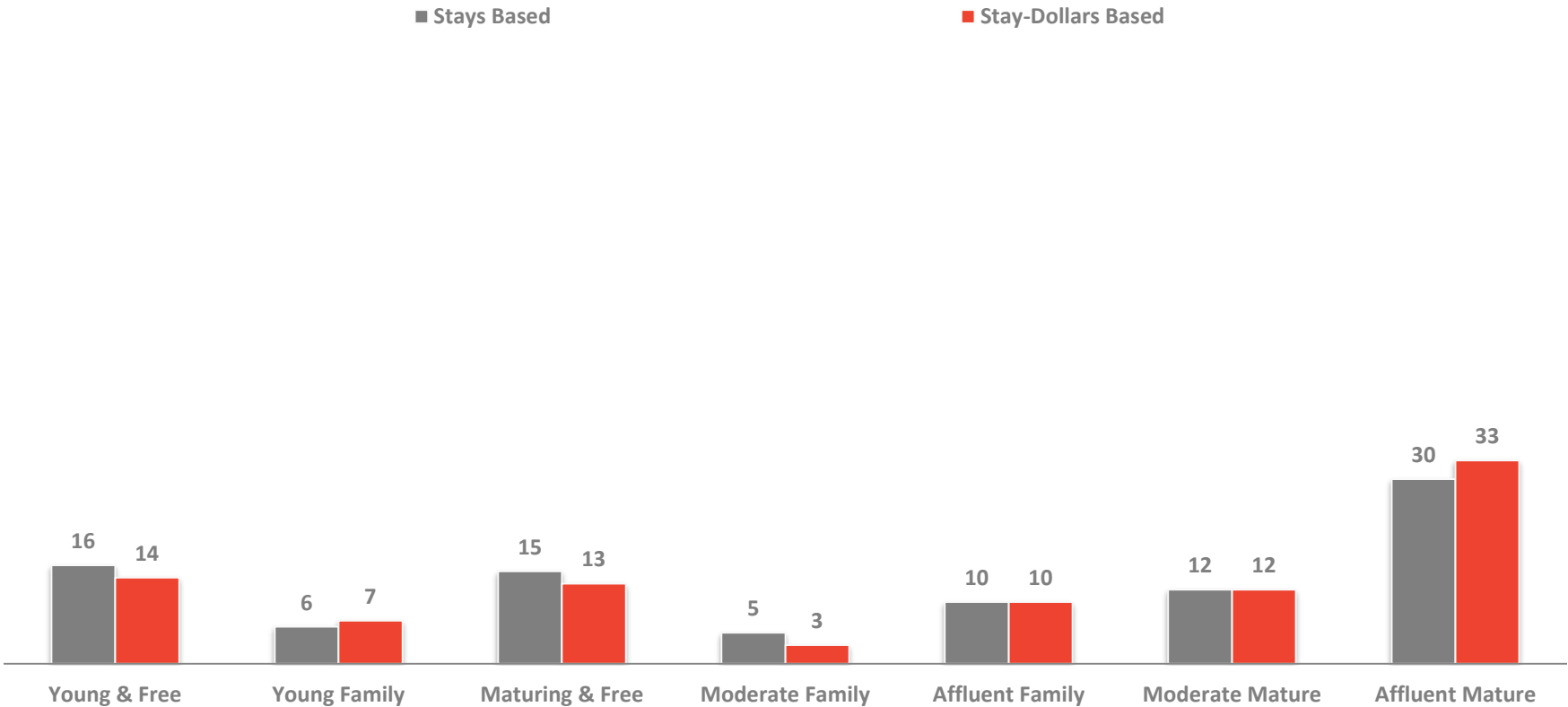


Chart 18 • Segment: 2016-2018 Overnight Leisure (%) • New Jersey n = 2,914 household count

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

DEMOGRAPHICS

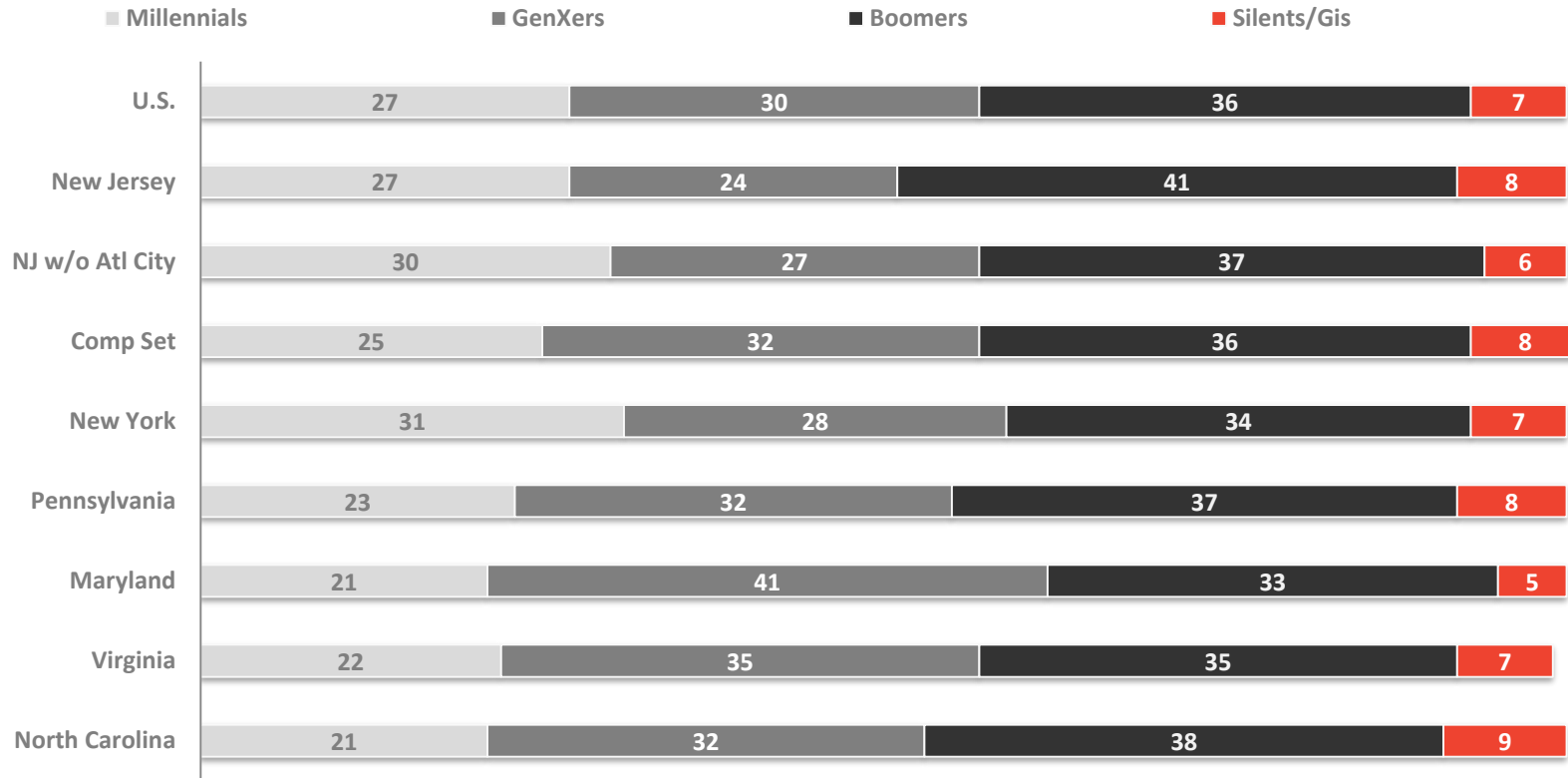


Chart 19 • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 household count

New Jersey Avg. Party per Stay Spending by Generation

DEMOGRAPHICS

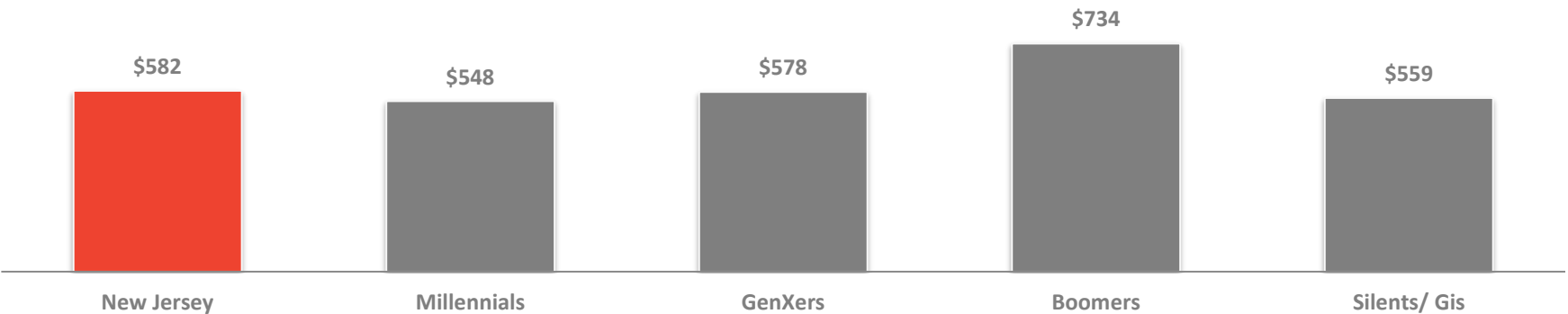


Chart 20 • Segment: 2016-2018 Overnight Leisure Stays (\$) • New Jersey n = 2,914 household count

New Jersey Traveler Generation Comparison

DEMOGRAPHICS

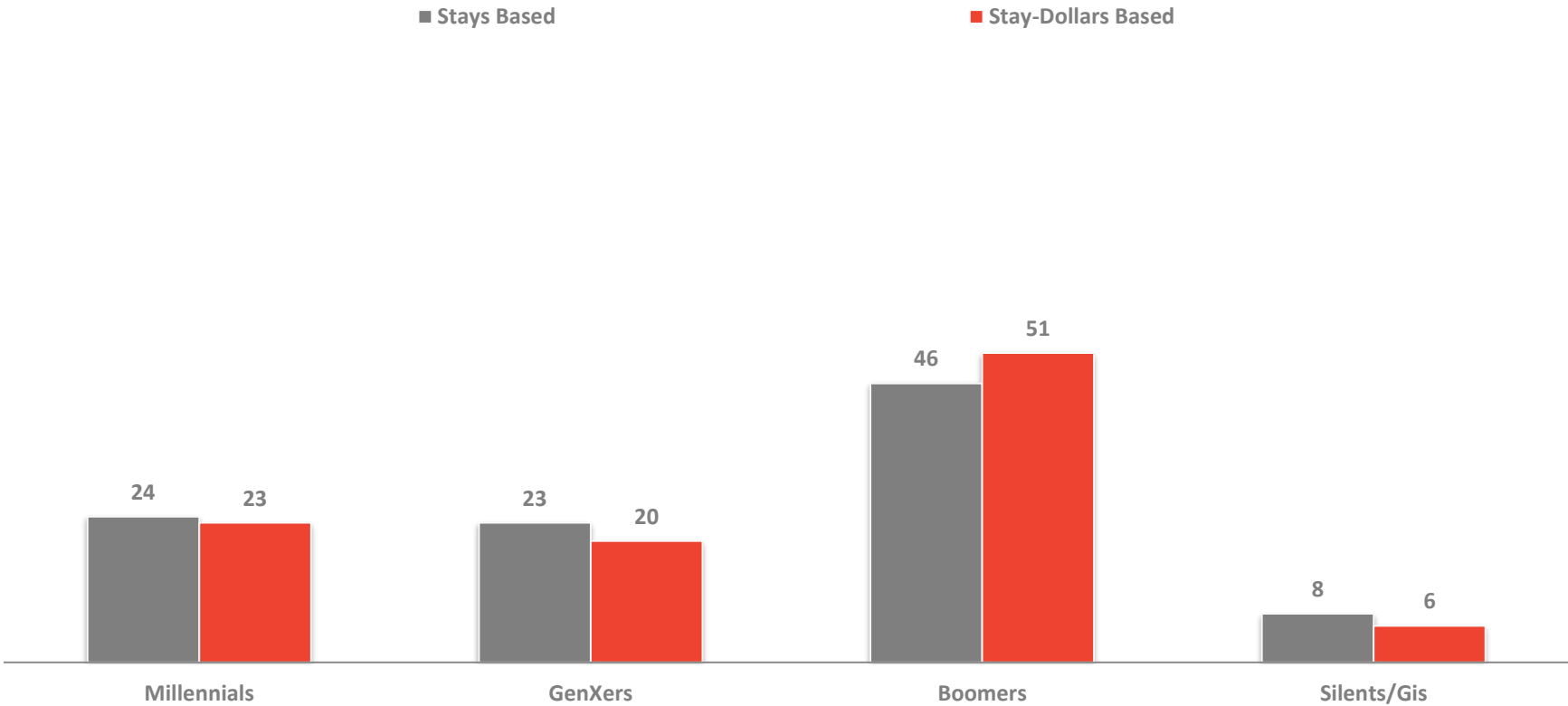
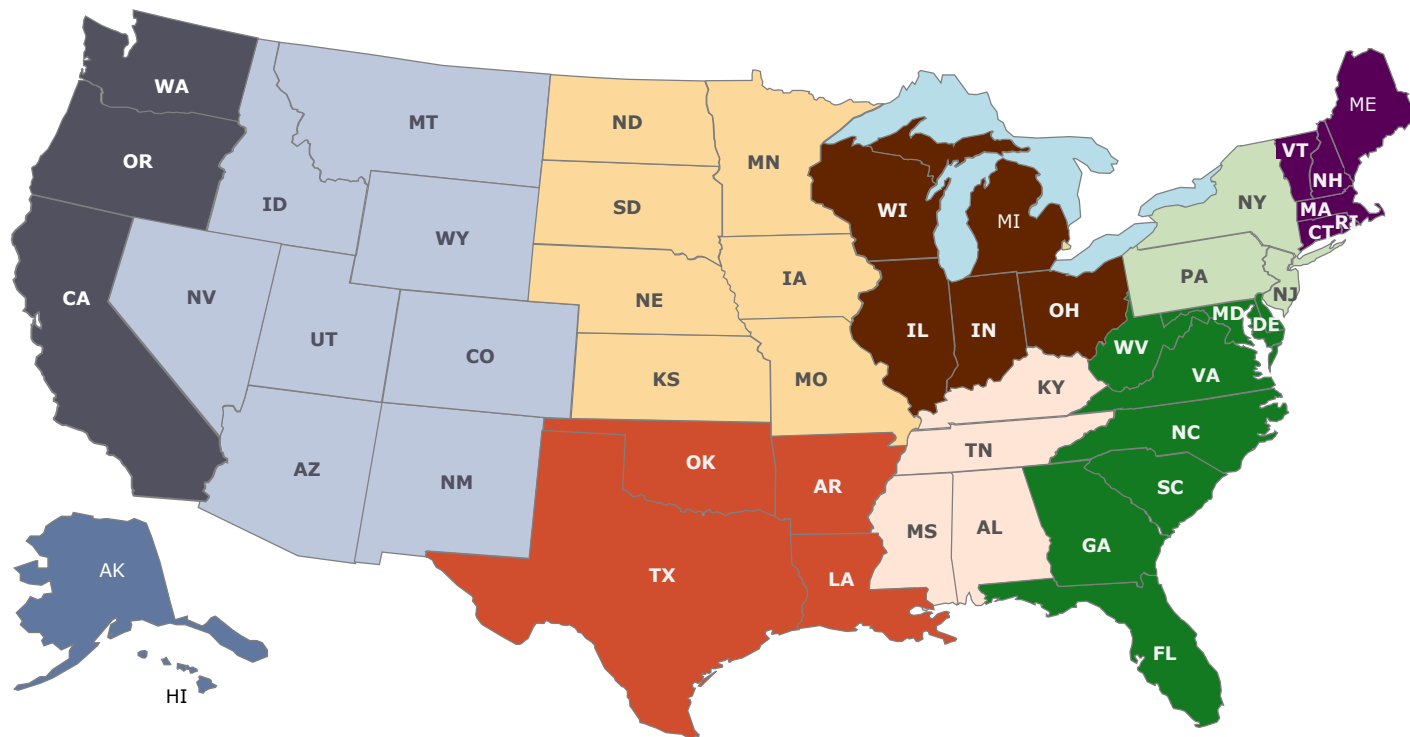


Chart 21 • Segment: 2016-2018 Overnight Leisure (%) • New Jersey n = 2,914 household count

Origin Divisions for Travel to New Jersey

TRIP ORIGIN



LEGEND

Pacific	0.7%
Mountain	1.1%
West North Central	1.1%
West South Central	1.9%
East North Central	3.4%
East South Central	0.1%
New England	6.7%
Middle Atlantic	65.9%
South Atlantic	19.1%

Chart 22 • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 household count

Top Origin States to New Jersey

TRIP ORIGIN

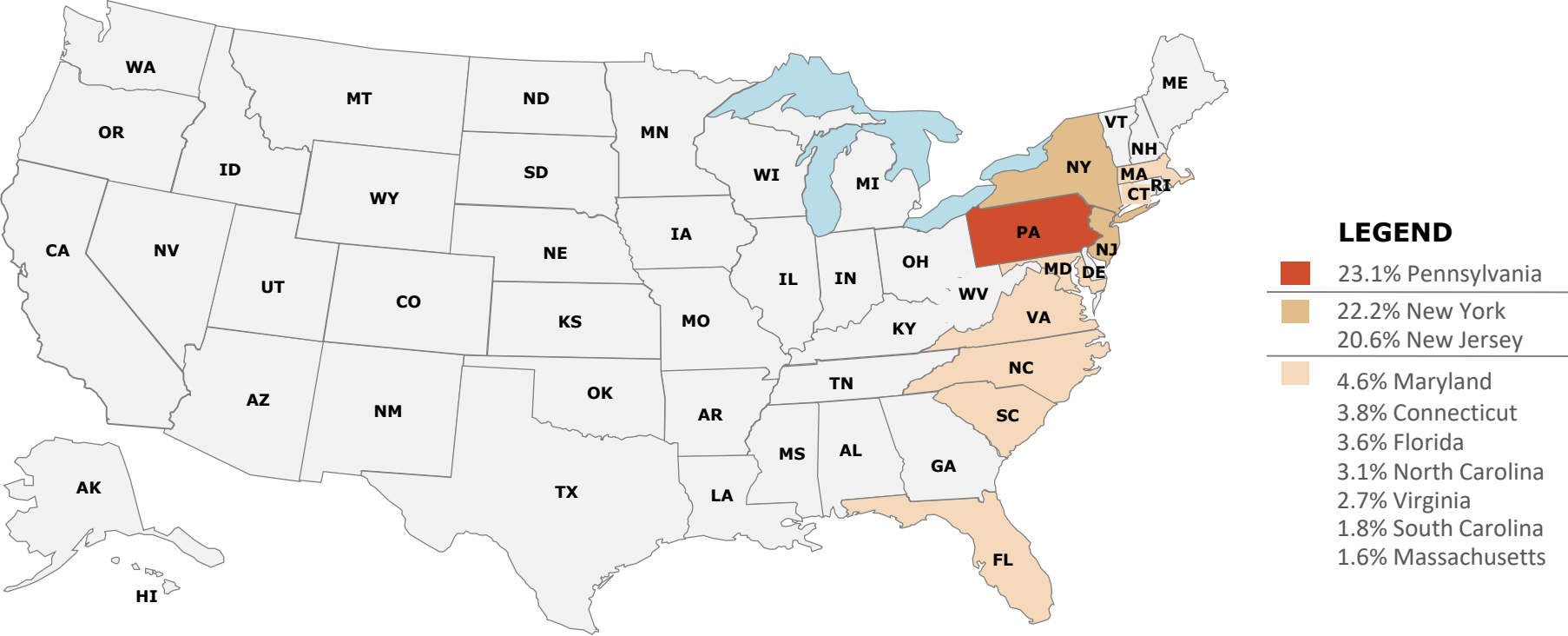


Chart 23 • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 household count

Top Origin DMAs to New Jersey

TRIP ORIGIN

	U.S.	New Jersey	NJ w/o Atl City	Comp Set	New York	Pennsylvania	Maryland	Virginia	North Carolina
New York, NY	5.4%	30.6%	25.6%	12.6%	20.3%	17.4%	9.3%	7.0%	3.1%
Philadelphia, PA	2.9%	26.7%	24.6%	7.4%	4.8%	15.0%	7.2%	7.6%	2.7%
Washington, DC	2.5%	4.8%	5.1%	8.0%	6.3%	4.6%	20.4%	12.0%	7.2%
Baltimore, MD	1.1%	3.7%	2.9%	2.9%	1.5%	2.3%	15.4%	3.3%	1.2%
Hartford & New Haven, CT	0.7%	3.5%	4.3%	1.1%	2.0%	0.8%	0.9%	0.8%	0.4%
Orlando-Daytona Beach-Melbourne, FL	1.4%	2.4%	3.2%	1.1%	1.2%	1.2%	0.4%	0.7%	1.5%
Albany-Schenectady-Troy, NY	0.7%	2.2%	2.8%	2.0%	4.4%	2.2%	0.3%	0.4%	0.4%
Raleigh-Durham, NC	1.5%	1.6%	2.1%	4.7%	0.4%	0.2%	2.5%	4.9%	15.0%
Harrisburg-Lancaster-Lebanon-York, PA	0.8%	1.5%	0.6%	3.0%	1.1%	7.5%	3.3%	3.2%	0.3%
Boston, MA	2.0%	1.4%	1.9%	3.1%	5.9%	2.9%	1.1%	3.0%	0.7%
Top 10 Sum	19.0%	78.4%	73.1%	45.9%	47.9%	54.1%	60.8%	43.9%	32.5%

New Jersey Avg. Party per Stay Spending by Origin DMA

TRIP ORIGIN

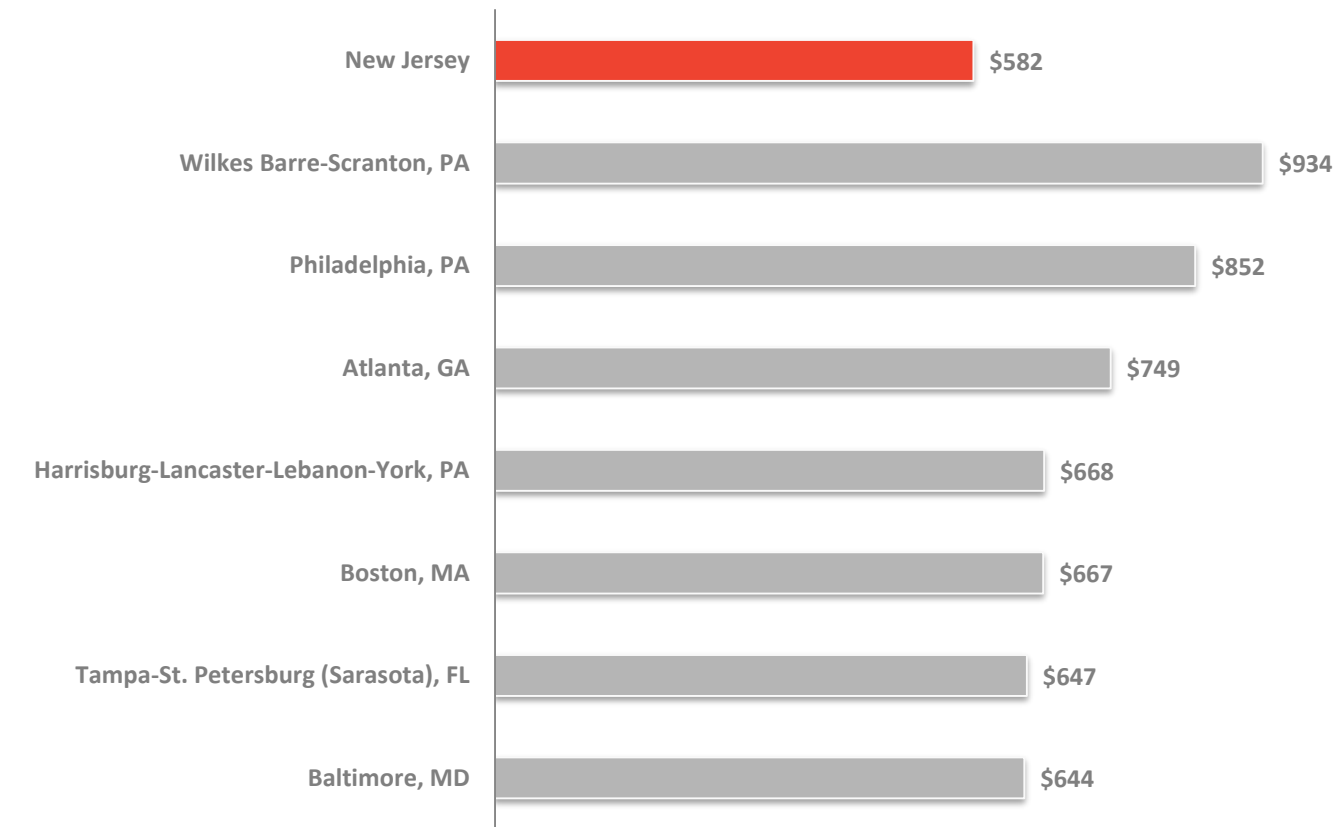


Chart 25 • Segment: 2016-2018 Overnight Leisure Stays (\$) • New Jersey n = 2,914 household count

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

TRIP ORIGIN

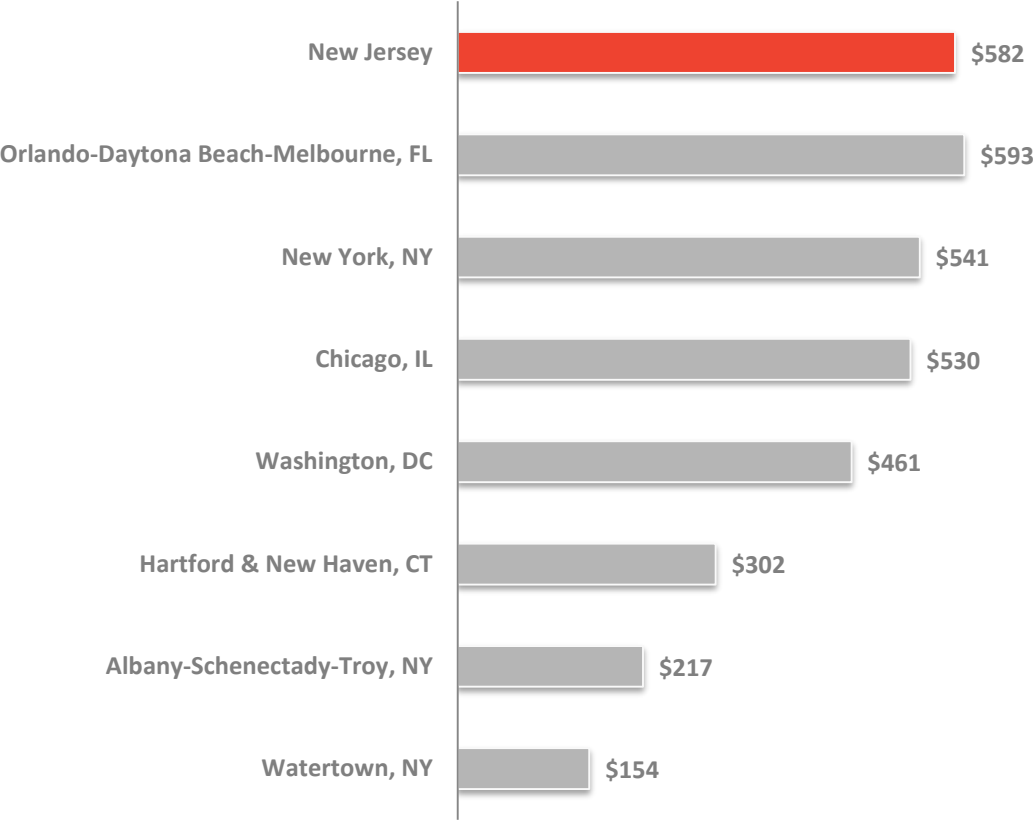


Chart 26 • Segment: 2016-2018 Overnight Leisure Stays (\$) • New Jersey n = 2,914 household count

New Jersey Origin DMA Comparison

TRIP ORIGIN

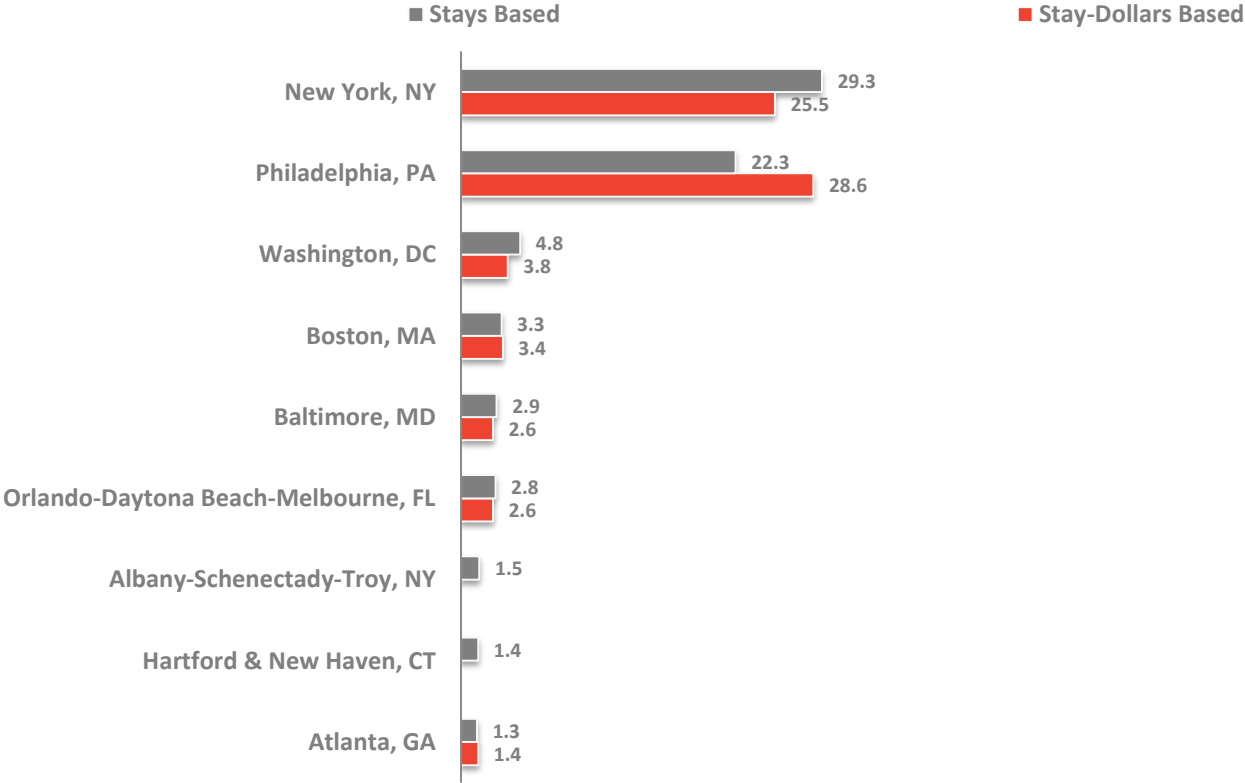


Chart 27 • Segment: 2016-2018 Overnight Leisure (%) • New Jersey n = 2,914 household count

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

TRANSPORTATION

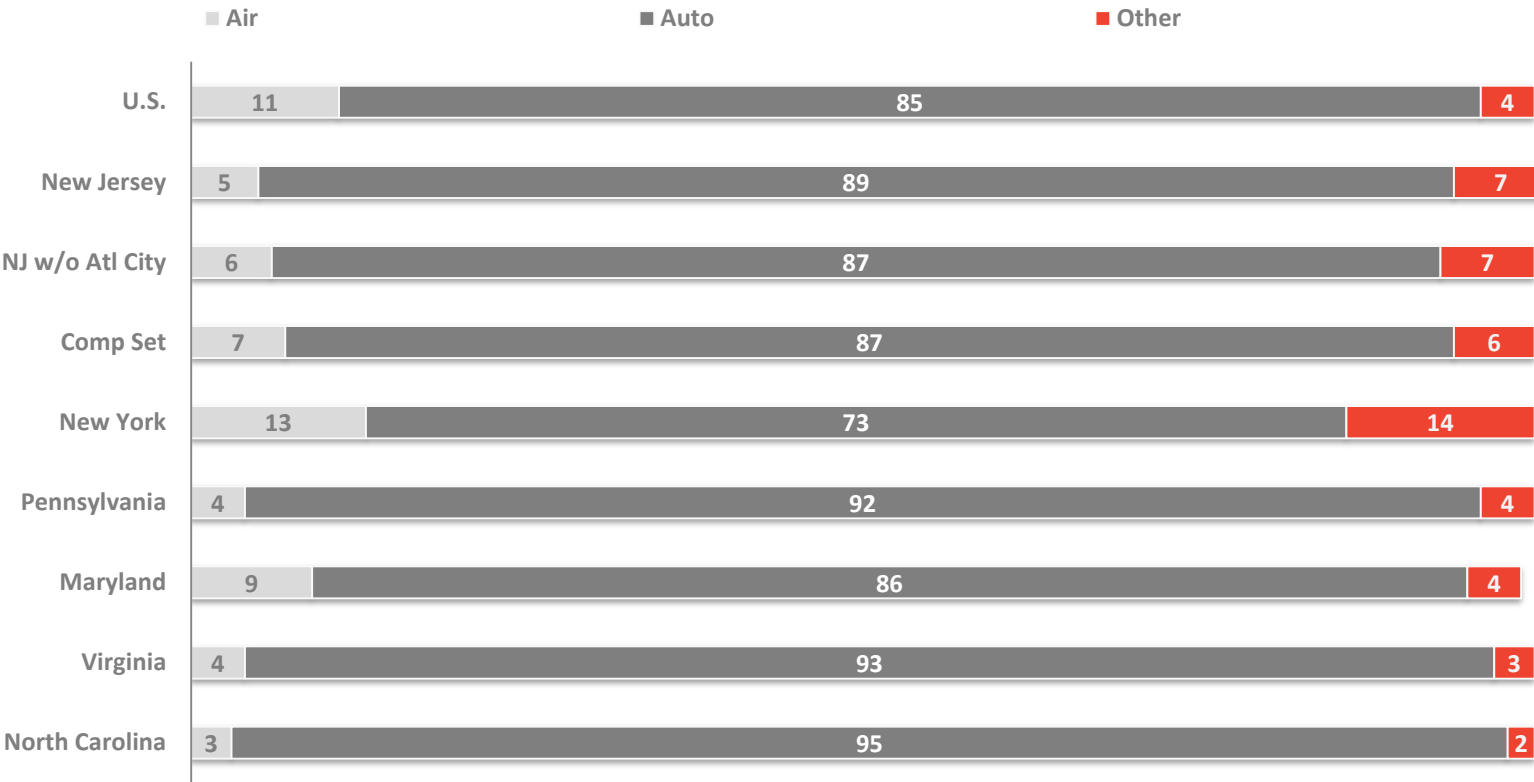


Chart 28 • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 household count

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

TRANSPORTATION

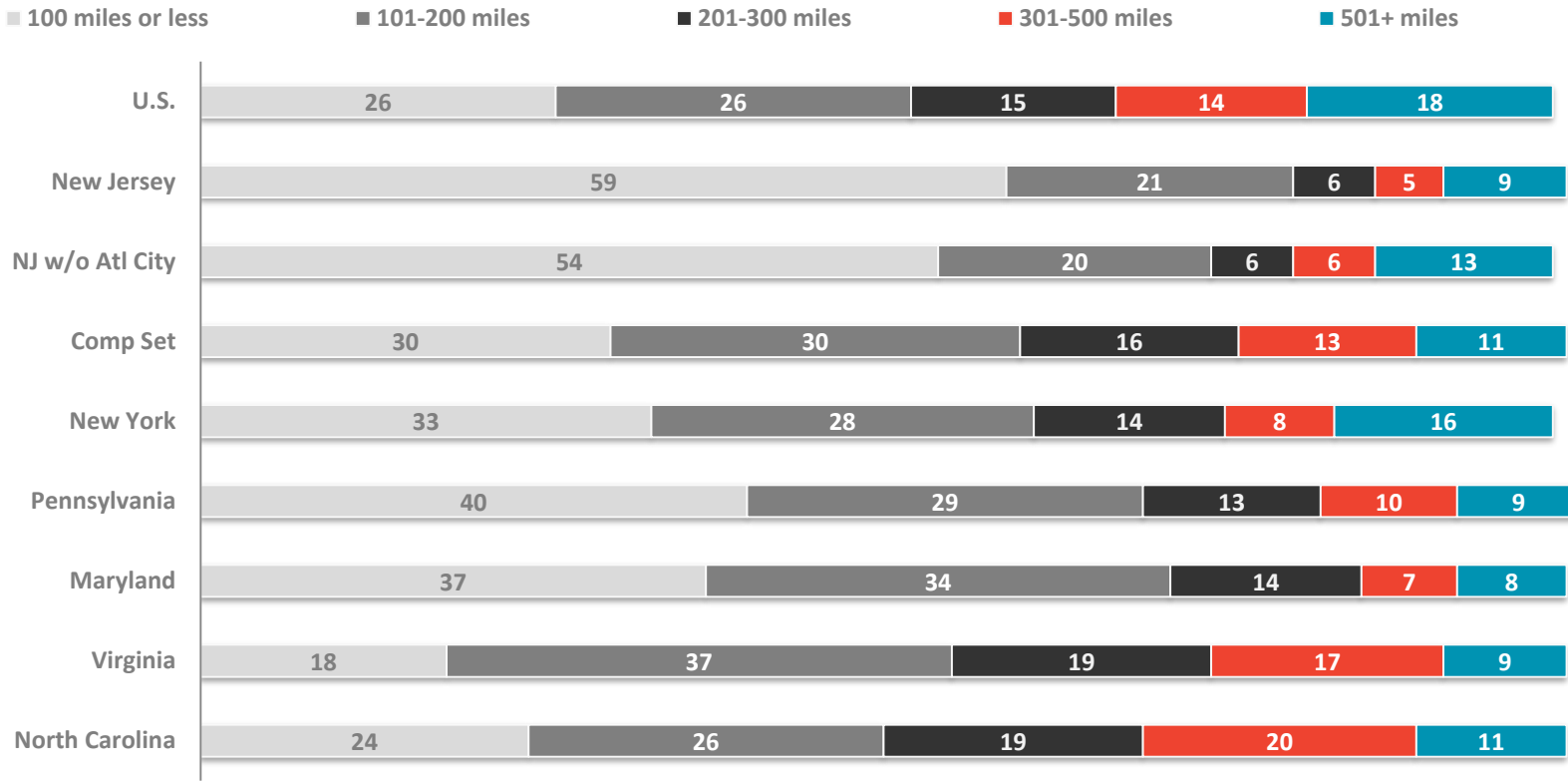


Chart 29 • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 household count

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

TRANSPORTATION

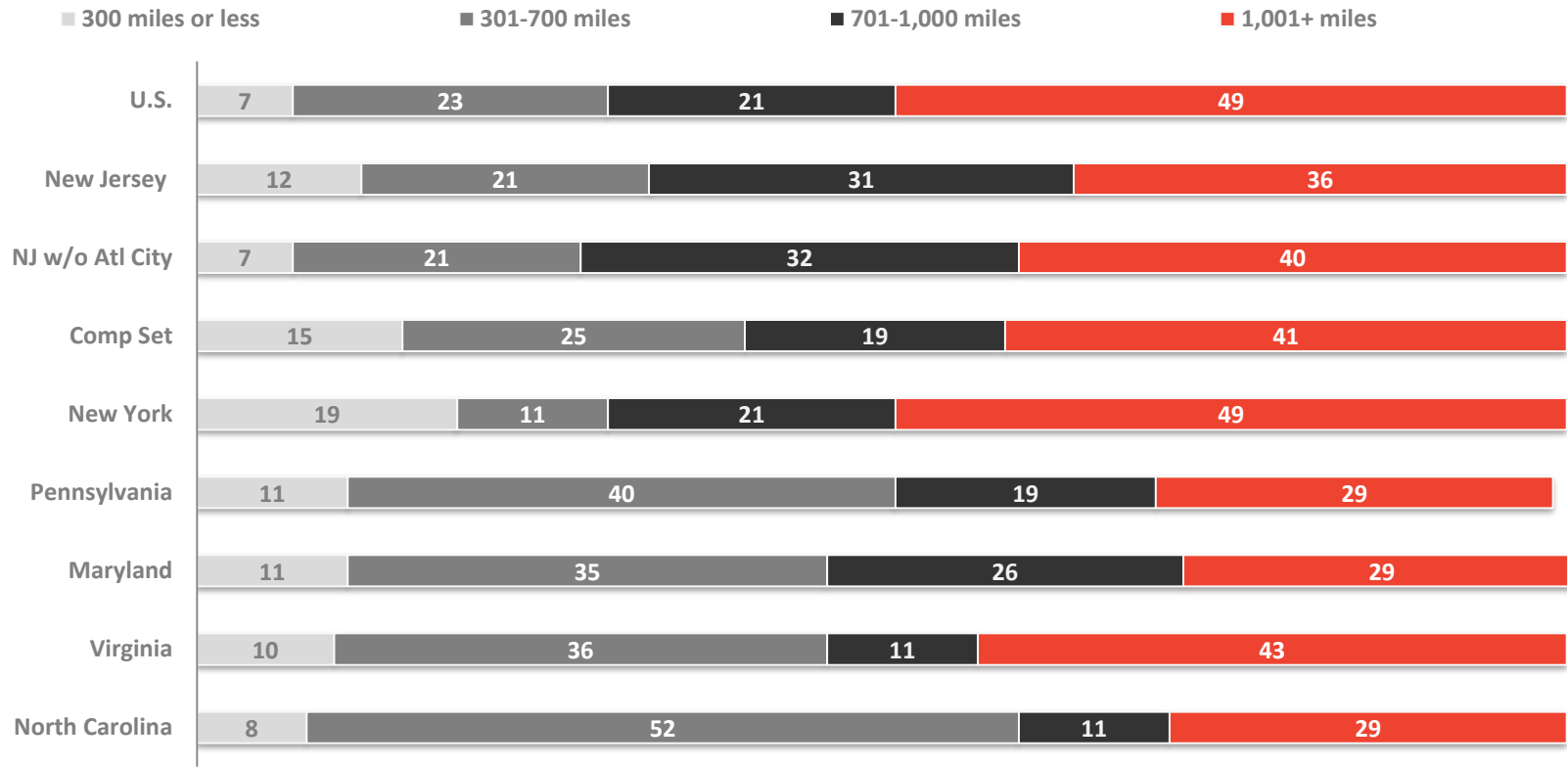


Chart 30 • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 household count

New Jersey Month Trip Started

TRIP TIMING

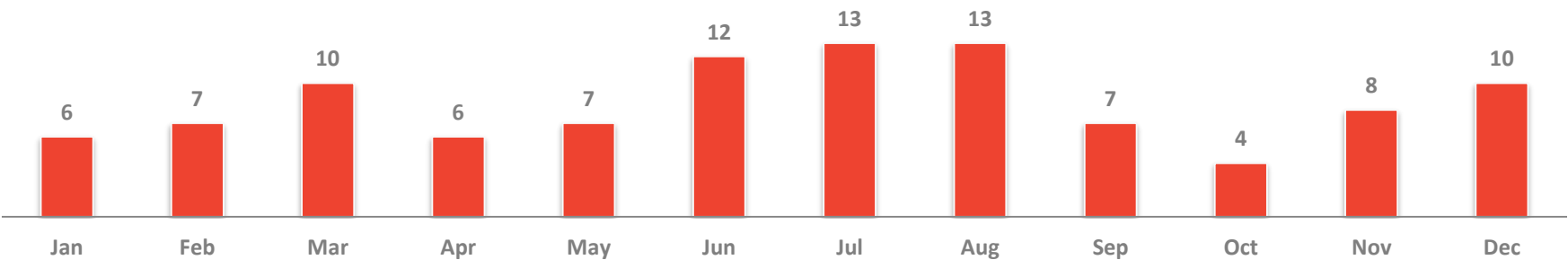


Chart 31 • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 household count

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

TRIP TIMING

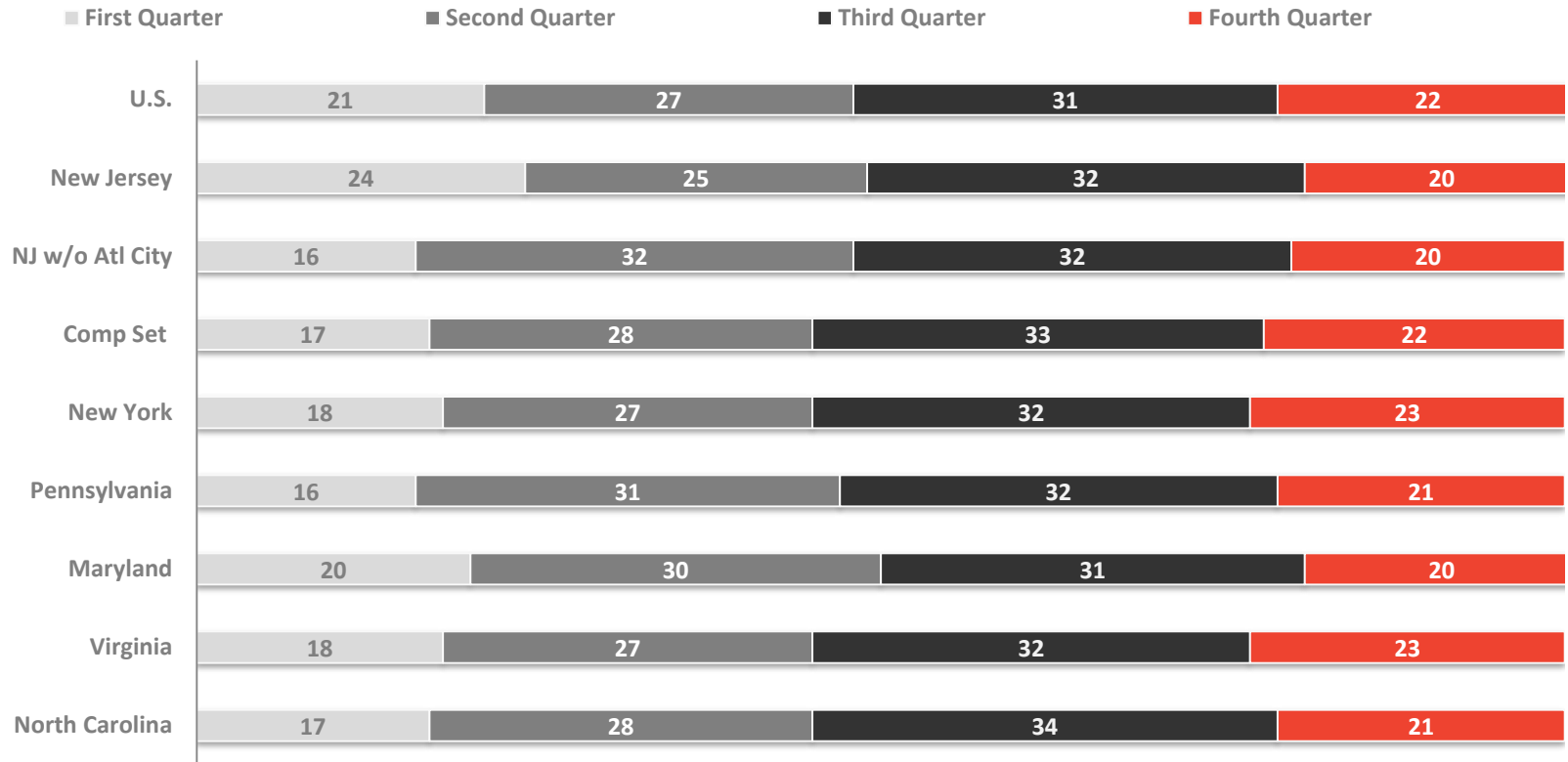


Chart 32 • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 household count

New Jersey Avg. Party per Stay Spending by Quarter

TRIP TIMING

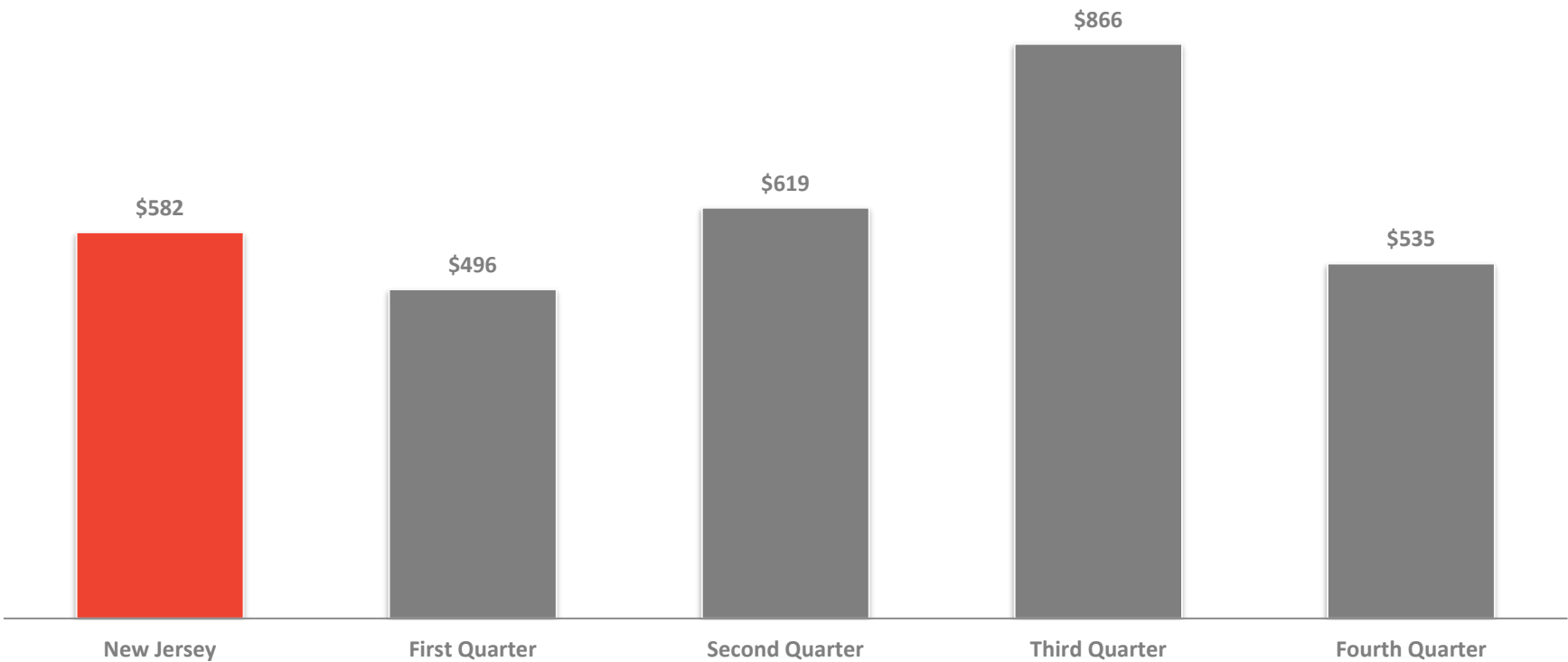


Chart 33 • Segment: 2016-2018 Overnight Leisure Stays (\$) • New Jersey n = 2,914 household count

New Jersey Trip Timing Comparison by Quarter

TRIP TIMING

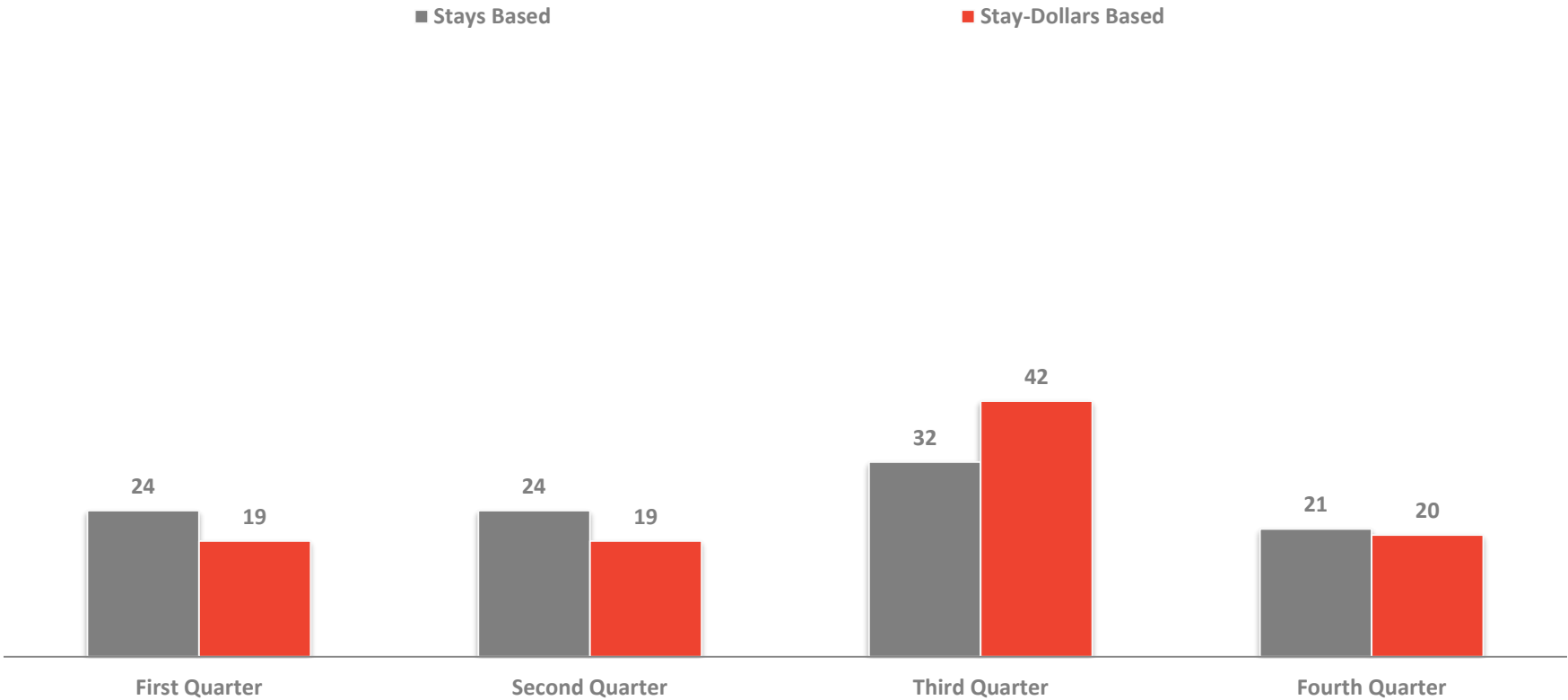


Chart 34 • Segment: 2016-2018 Overnight Leisure (%) • New Jersey n = 2,914 household count

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

TRIP TIMING

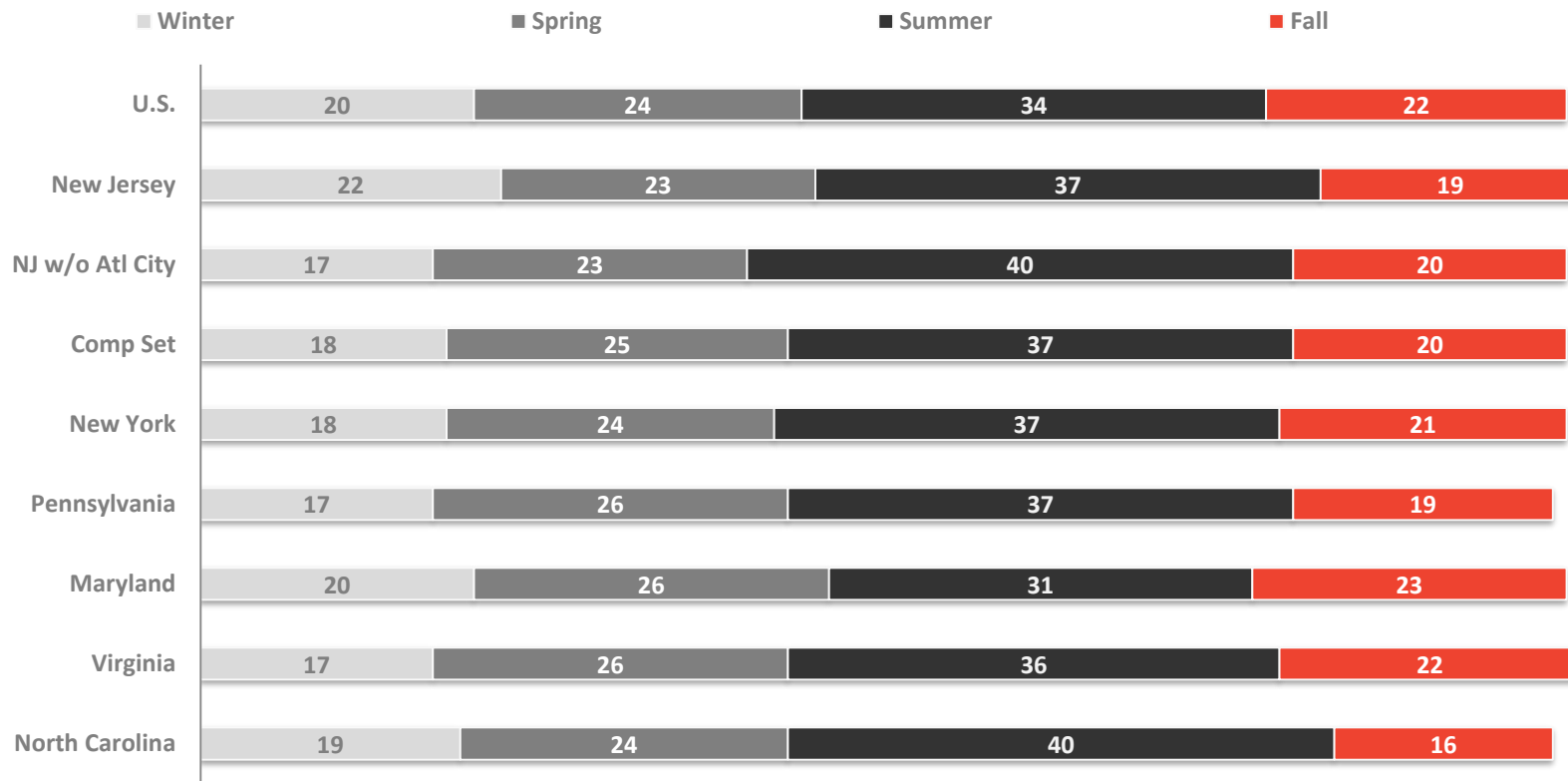


Chart 35 • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 household count

New Jersey Avg. Party per Stay Spending by Season

TRIP TIMING

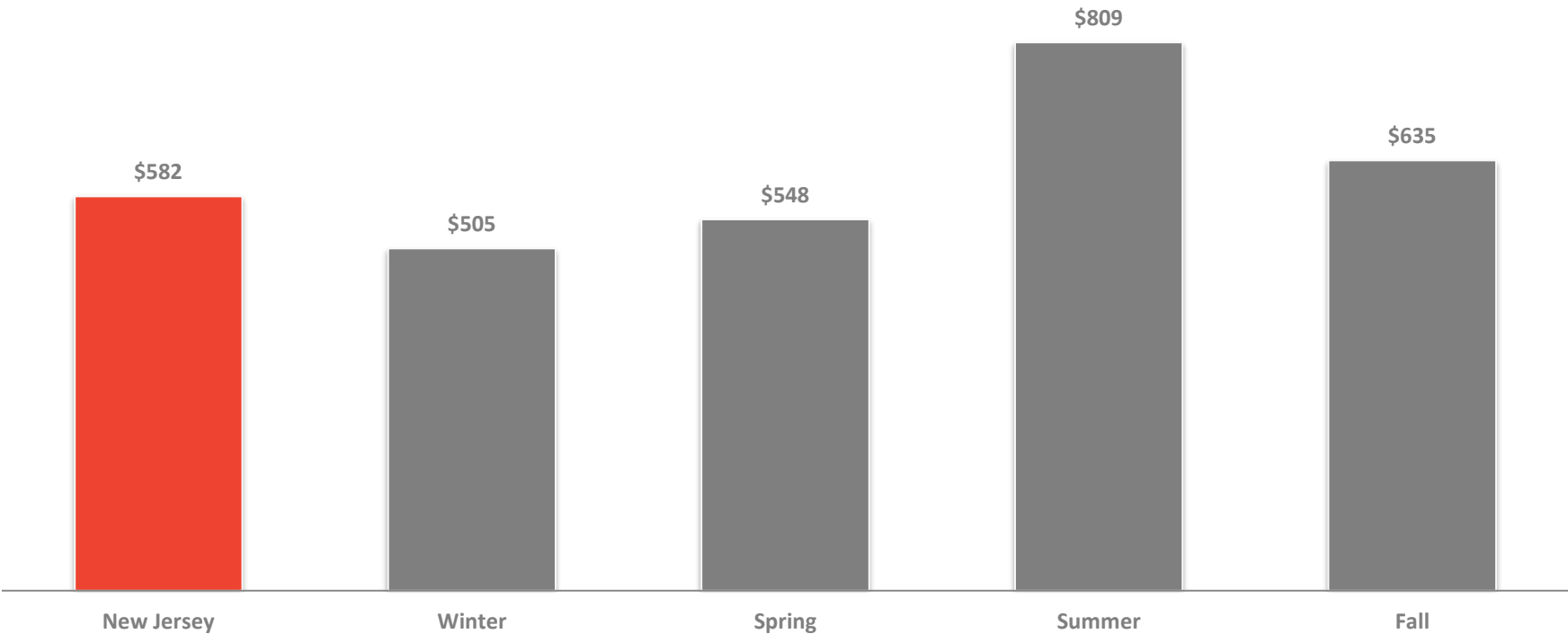


Chart 36 • Segment: 2016-2018 Overnight Leisure Stays (\$) • New Jersey n = 2,914 household count

New Jersey Trip Timing Comparison by Season

TRIP TIMING

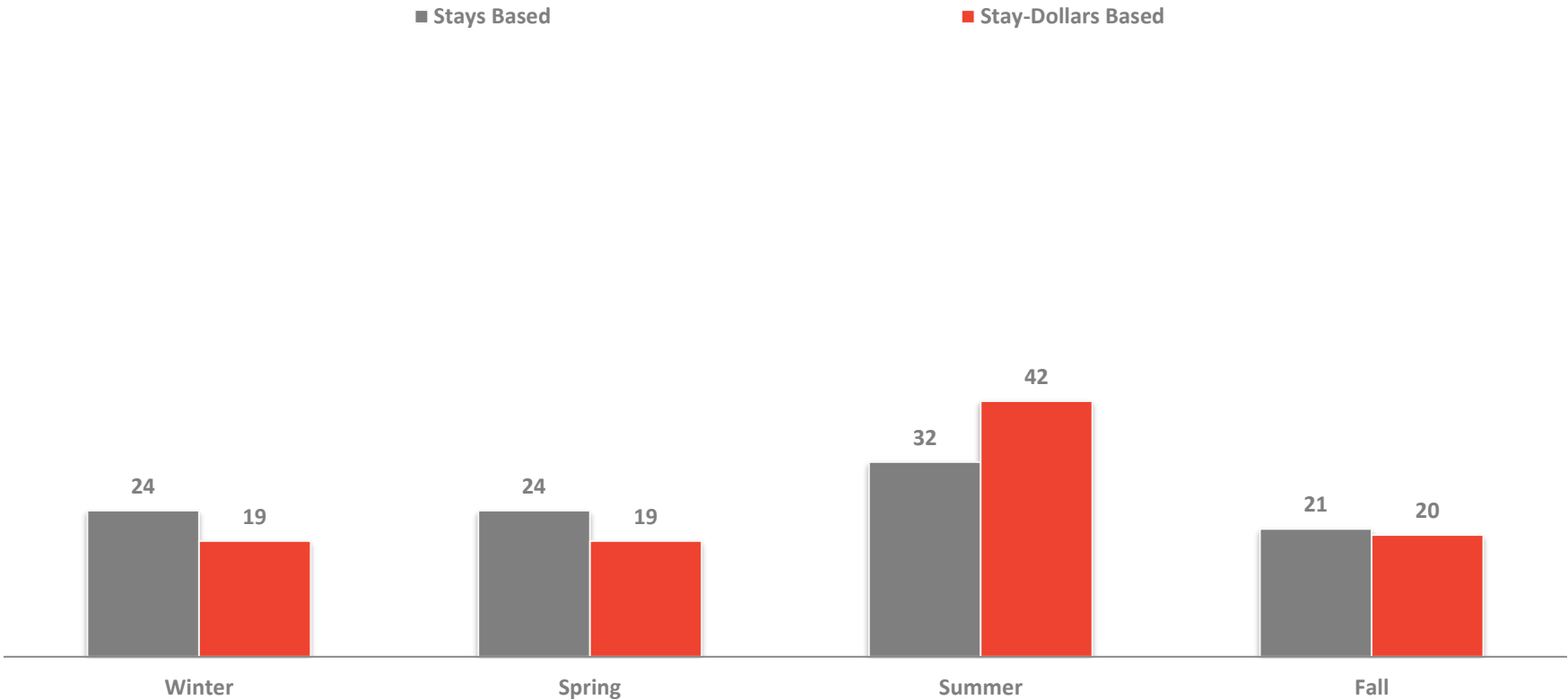


Chart 37 • Segment: 2016-2018 Overnight Leisure (%) • New Jersey n = 2,914 household count

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

TRIP CHARACTERISTICS

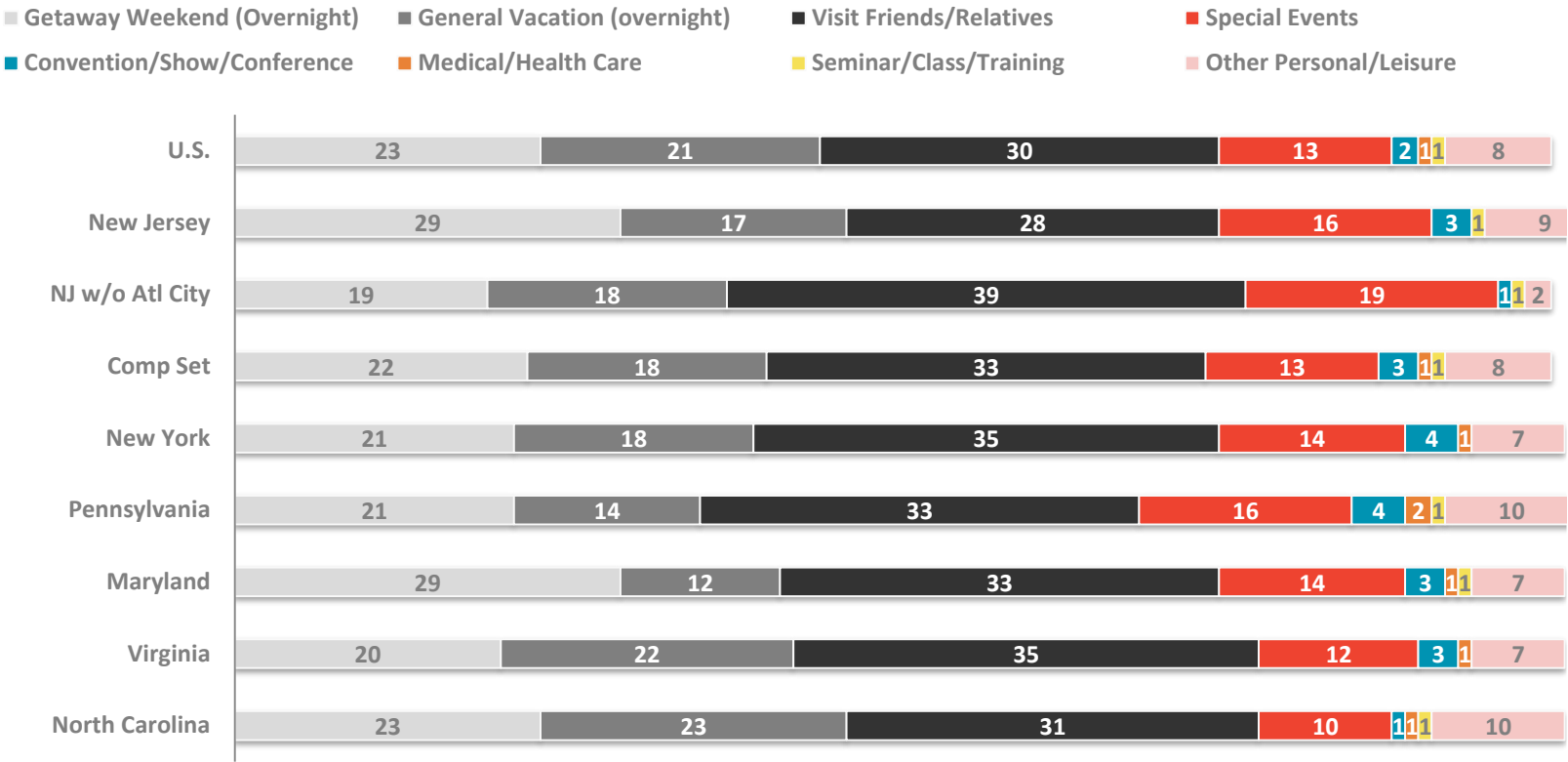


Chart 38 • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 household count

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

TRIP CHARACTERISTICS

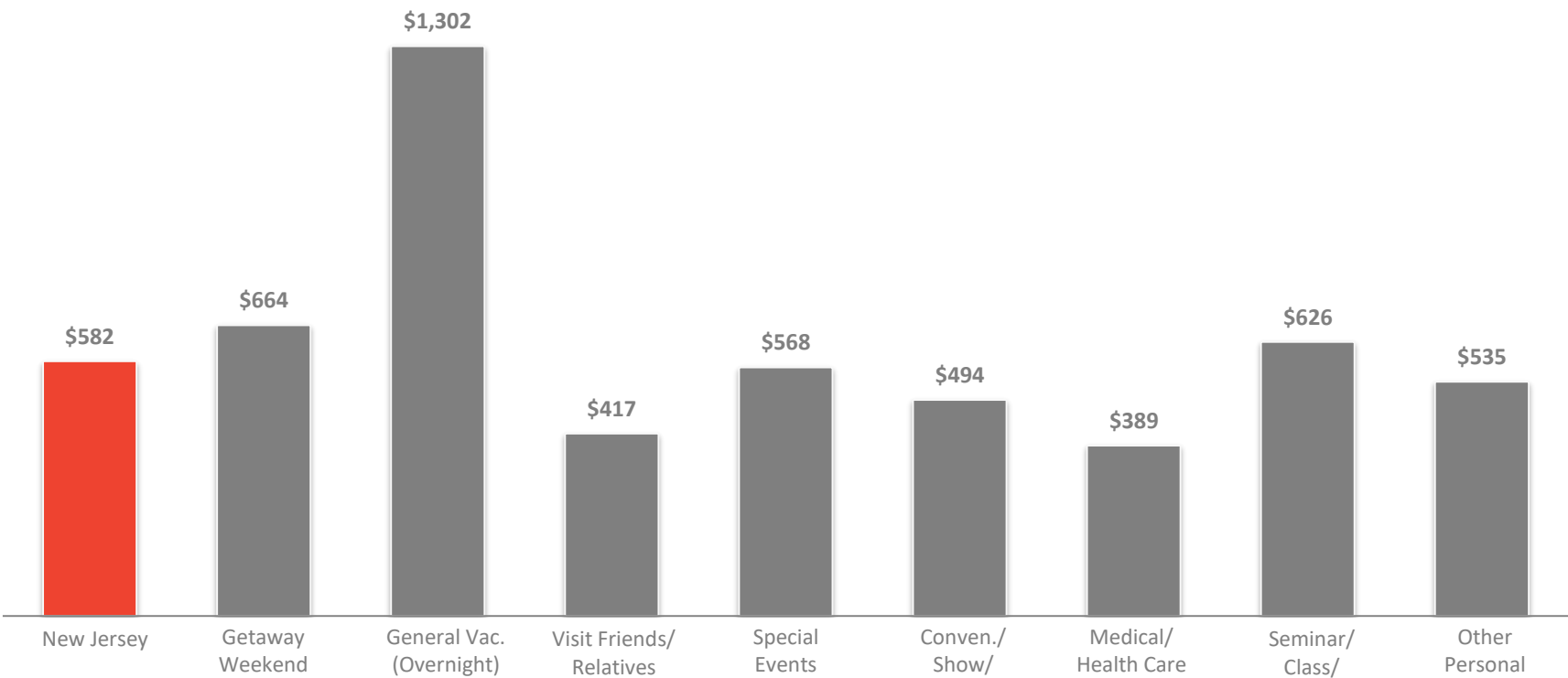


Chart 39 • Segment: 2016-2018 Overnight Leisure Stays (\$) • New Jersey n = 2,914 household count

New Jersey Purpose of Stay Comparison

TRIP CHARACTERISTICS

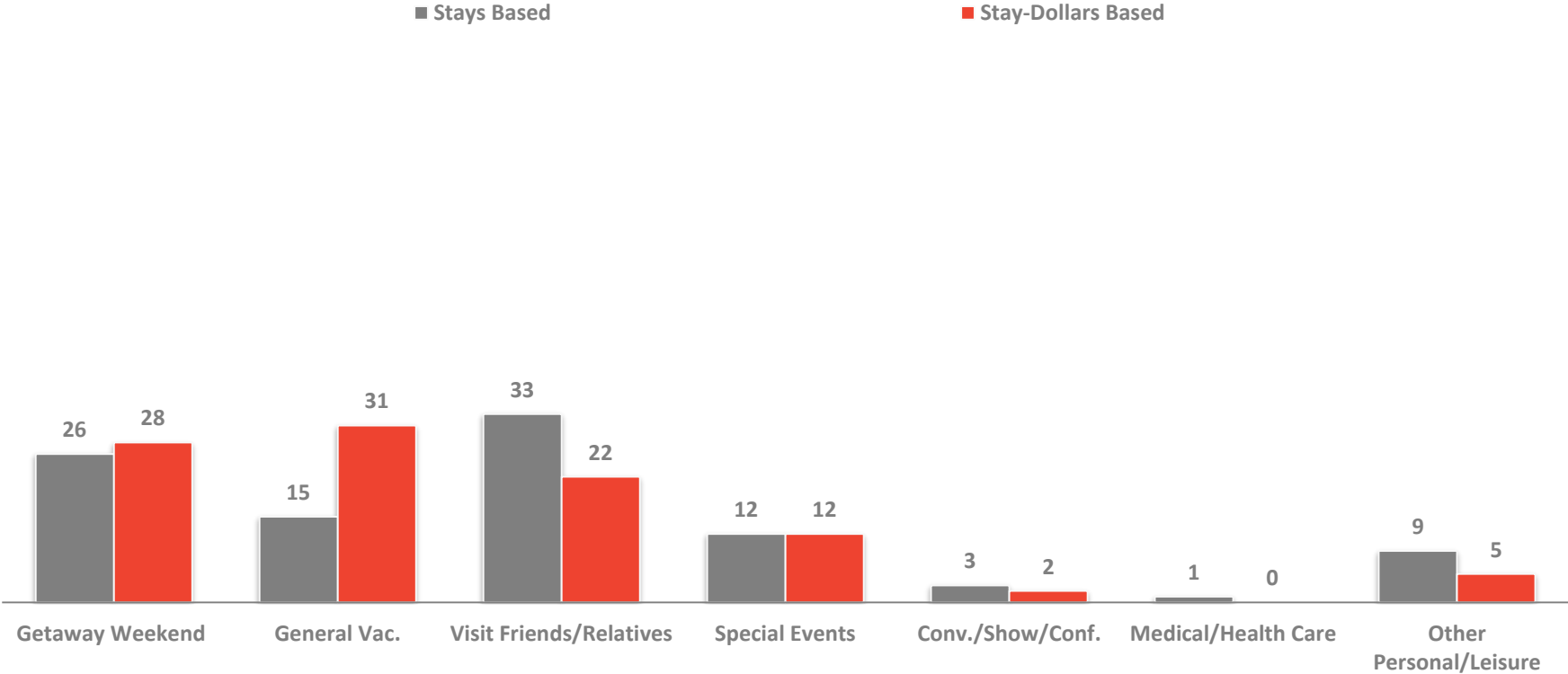


Chart 40 • Segment: 2016-2018 Overnight Leisure (%) • New Jersey n = 2,914 household count

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

TRIP CHARACTERISTICS

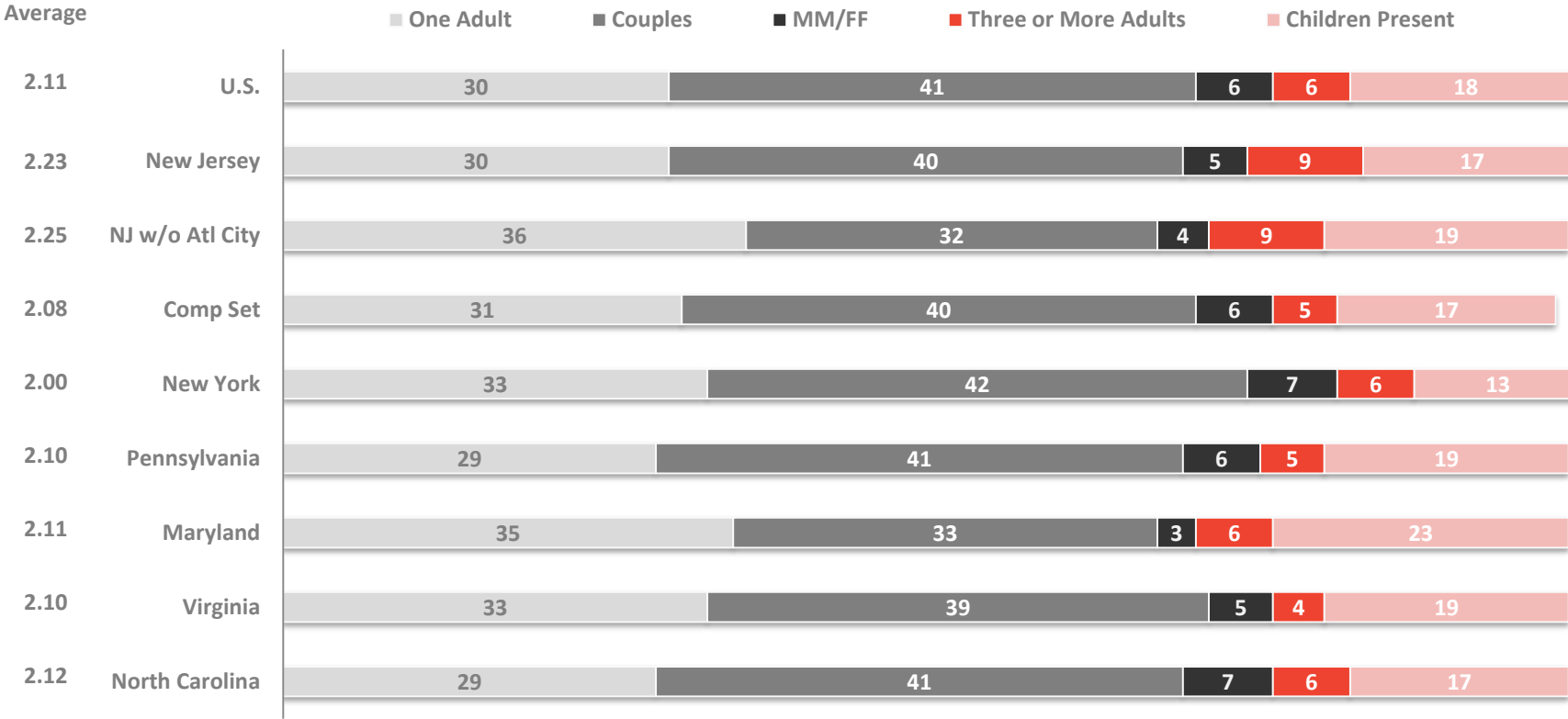


Chart 41 • Segment: 2018 Overnight Leisure Stays (%) • New Jersey n = 825 household count

GLOSSARY

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

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

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

TRIP CHARACTERISTICS

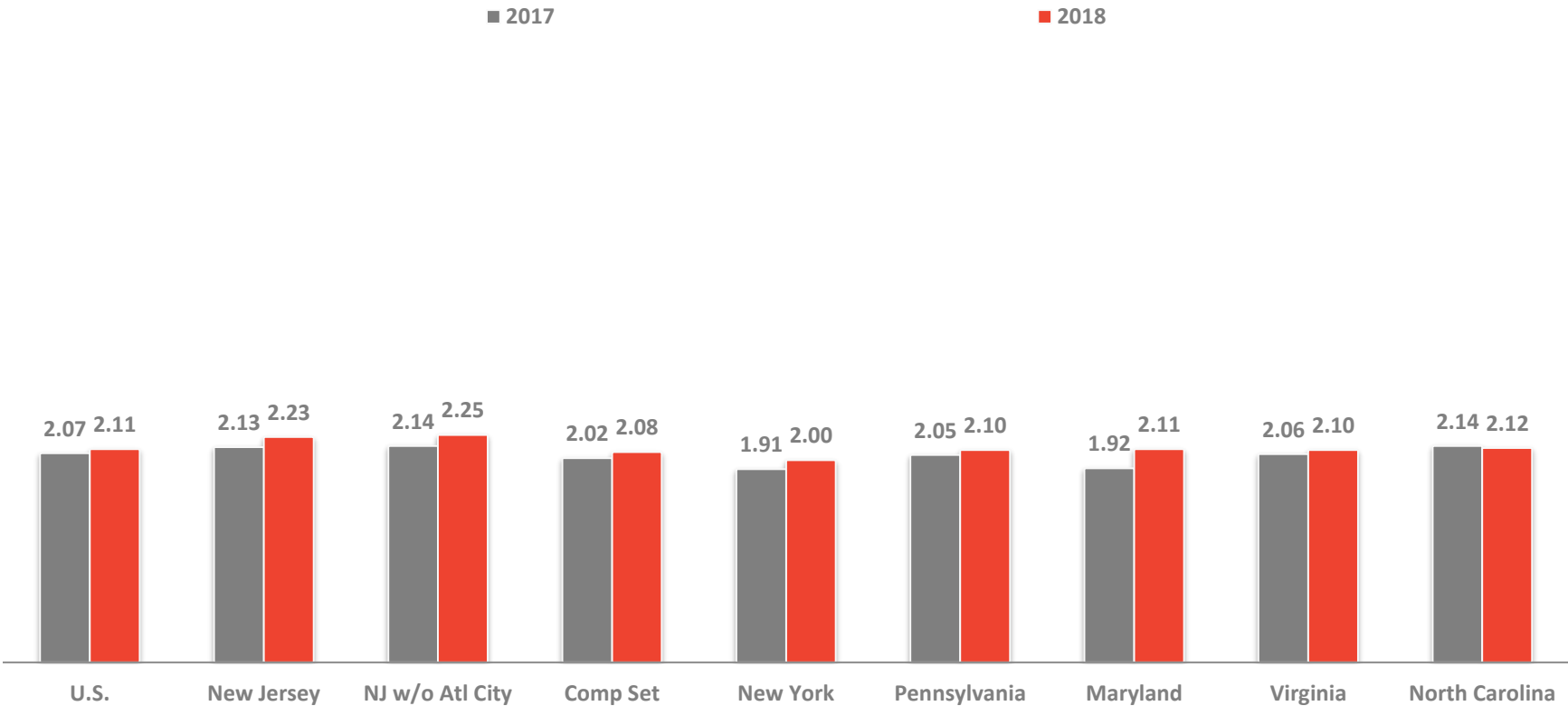


Chart 42 • Segment: 2017/2018 Overnight Leisure Stays • New Jersey n = 825 household count

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

TRIP CHARACTERISTICS

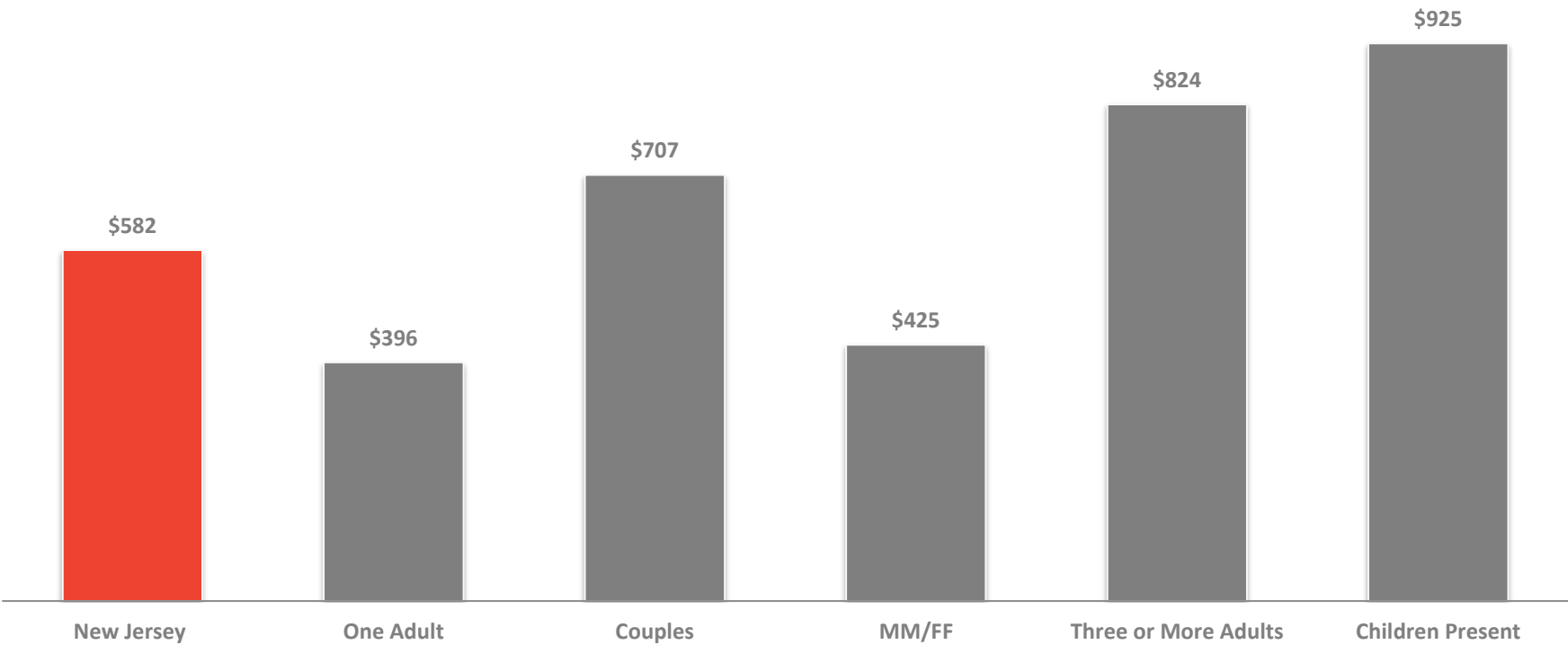


Chart 43 • Segment: 2016-2018 Overnight Leisure Stays (\$) • New Jersey n = 2,914 household count

New Jersey Travel Party Comparison

TRIP CHARACTERISTICS

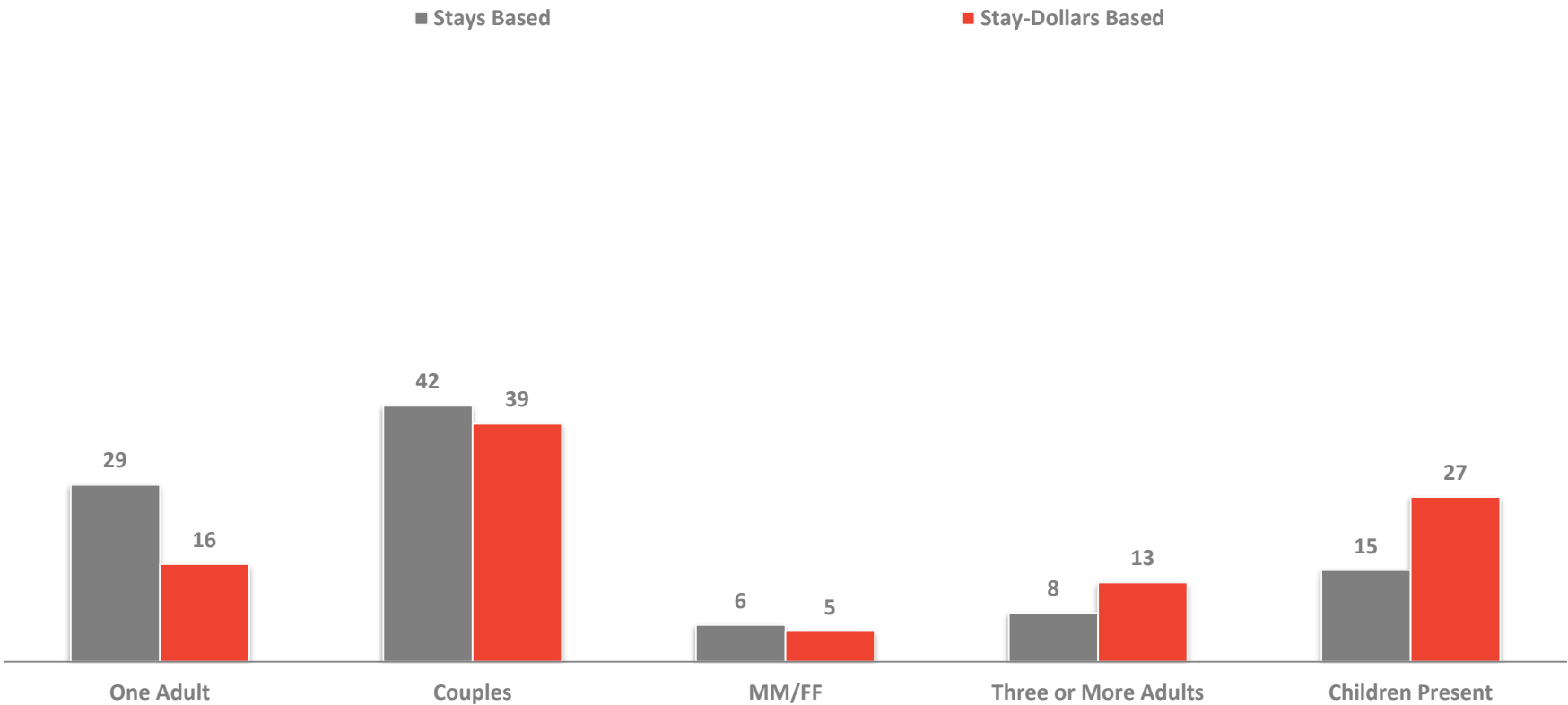


Chart 44 • Segment: 2016-2018 Overnight Leisure (%) • New Jersey n = 2,914 household count

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

TRIP CHARACTERISTICS

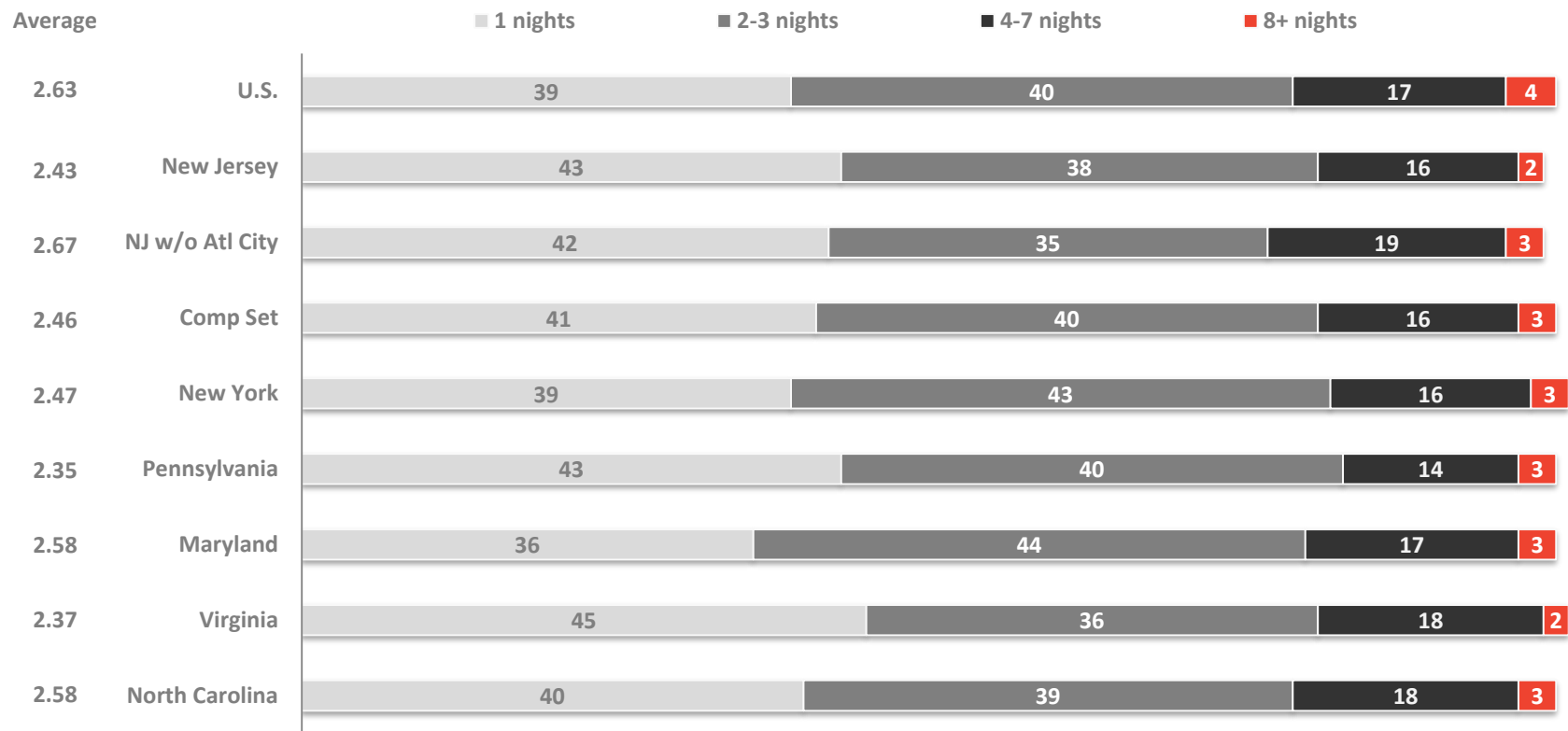


Chart 45 • Segment: 2018 Overnight Leisure Stays (%) • New Jersey n = 825 household count

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

TRIP CHARACTERISTICS

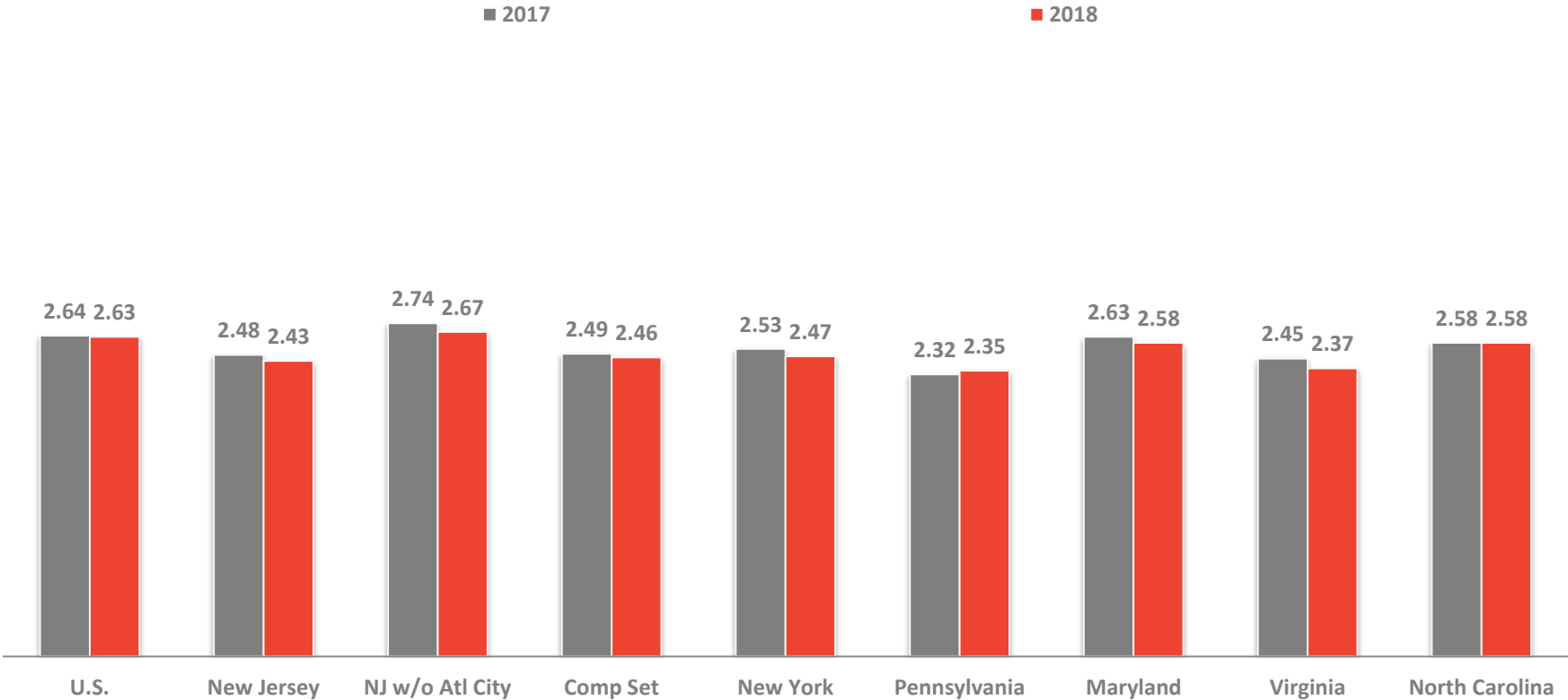


Chart 46 • Segment: 2017/2018 Overnight Leisure Stays • New Jersey n = 825 household count

New Jersey Avg. Party per Stay Spending by Stay Length

TRIP CHARACTERISTICS

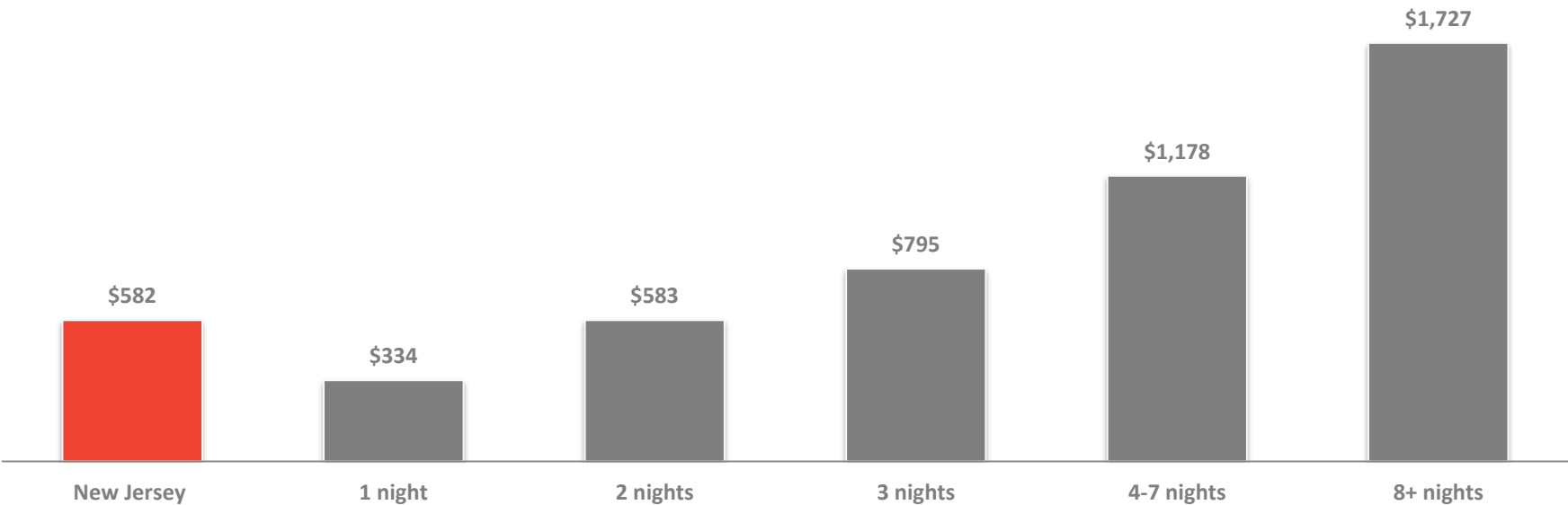


Chart 47 • Segment: 2016-2018 Overnight Leisure Stays (\$) • New Jersey n = 2,914 household count

New Jersey Stay Length Comparison

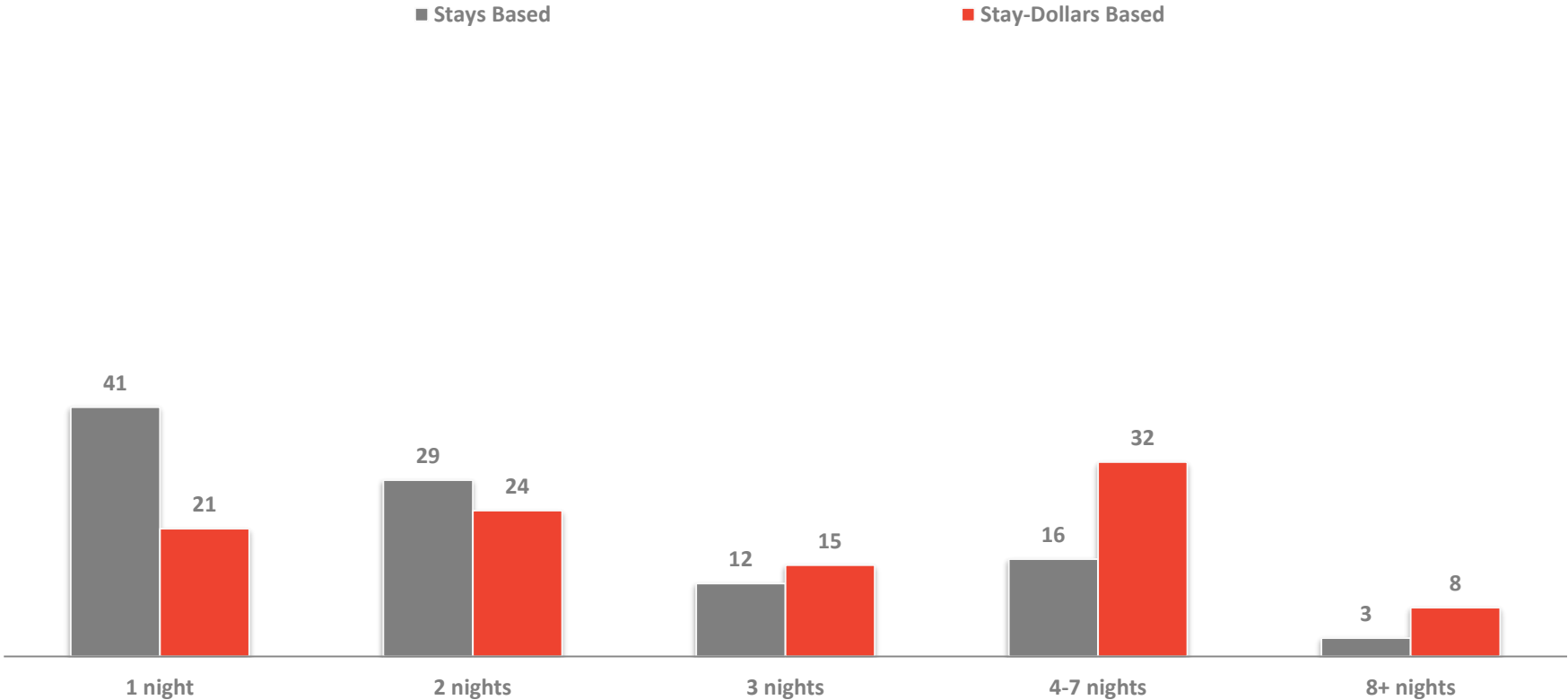


Chart 48 • Segment: 2016-2018 Overnight Leisure (%) • New Jersey n = 2,914 household count

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

TRIP CHARACTERISTICS

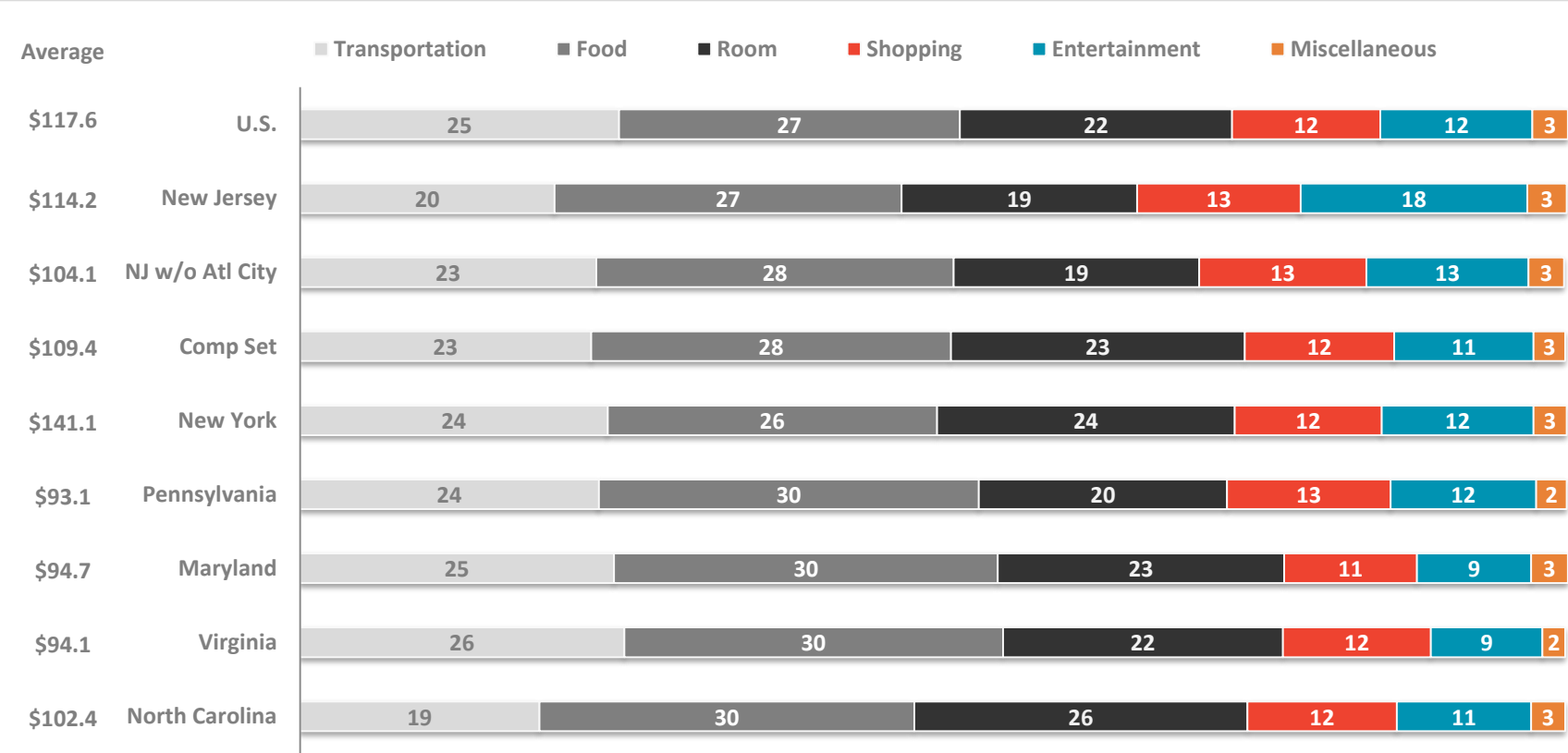


Chart 49 • Segment: 2018 Overnight Leisure Person-Days (%) • New Jersey n = 825 household count

New Jersey Activity Participation

ACTIVITY PARTICIPATION

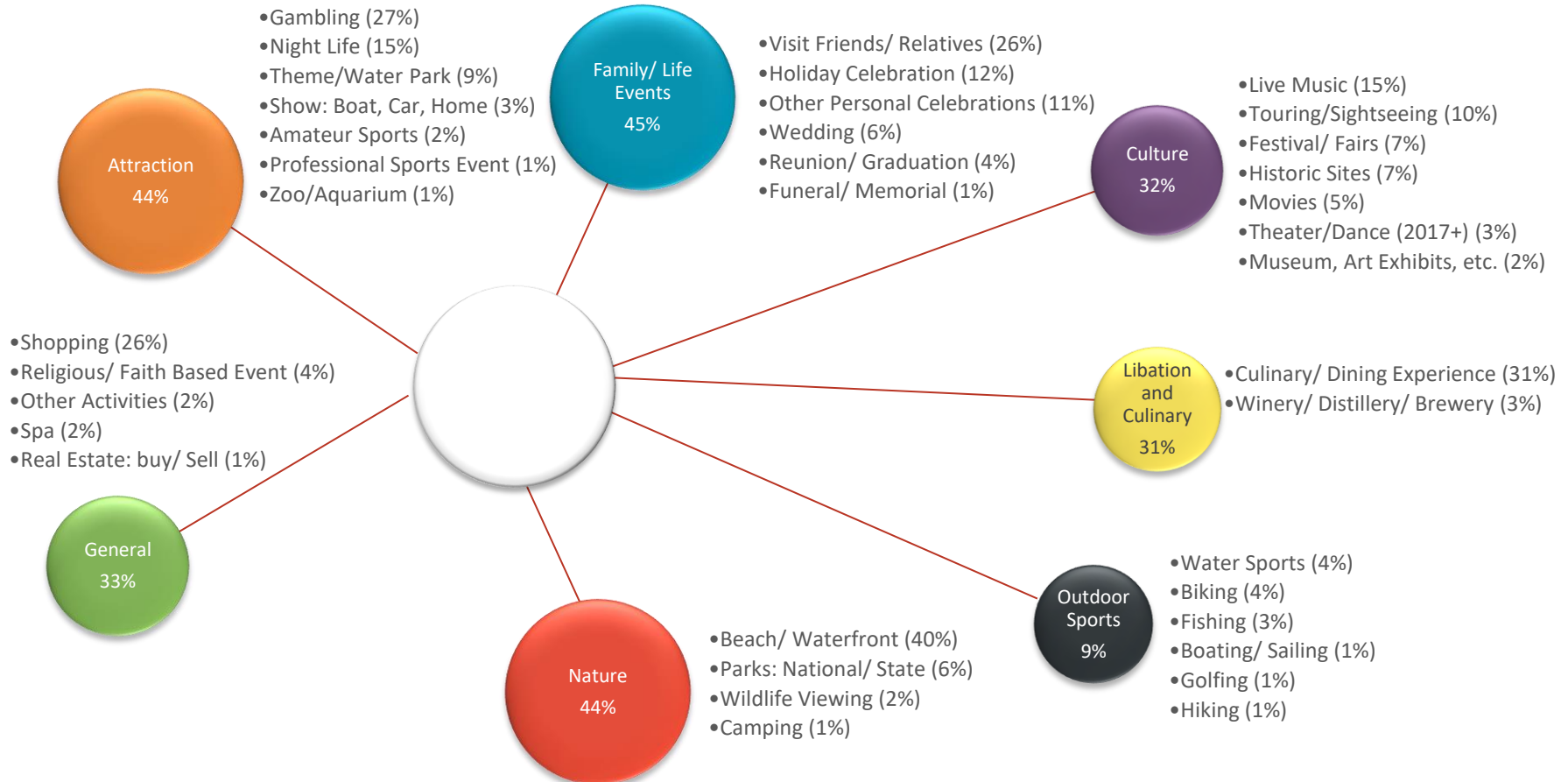


Chart 50 • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 household count

Top Activities at the Destination

ACTIVITY PARTICIPATION

	U.S.	New Jersey	NJ w/o Atl City	New York	Pennsylvania	Maryland	Virginia	North Carolina
Beach/Waterfront	19%	40%	36%	10%	4%	29%	16%	21%
Culinary/Dining Experience	29%	31%	29%	30%	27%	31%	29%	28%
Gambling	7%	27%	2%	5%	4%	4%	1%	4%
Visit Friends/Relatives	31%	26%	35%	34%	28%	32%	34%	29%
Shopping	24%	26%	20%	25%	22%	24%	19%	22%
Nightlife	10%	15%	10%	12%	9%	16%	7%	7%
Live Music	9%	15%	11%	9%	6%	10%	5%	7%
Holiday Celebration (Thanksgiving, July 4th etc.)	7%	12%	16%	8%	8%	7%	9%	7%
Other Personal Celebrations	8%	11%	9%	11%	8%	10%	6%	8%
Touring/Sightseeing	15%	10%	13%	18%	12%	11%	13%	14%
Theme/Amusement/Water Parks	6%	9%	11%	3%	9%	4%	7%	3%
Historic Sites	13%	7%	8%	16%	12%	12%	15%	15%
Festivals/Fairs (state, craft, etc.)	5%	7%	8%	4%	5%	8%	5%	4%
Parks (national/state)	14%	6%	8%	19%	10%	9%	14%	15%
Wedding	3%	6%	8%	4%	4%	2%	2%	2%
Movies	5%	5%	6%	4%	3%	5%	6%	3%
Biking	2%	4%	6%	2%	1%	3%	2%	2%
Reunion/Graduation	3%	2%	2%	4%	5%	4%	4%	2%
Religious/Faith Based Conference	3%	4%	6%	5%	3%	3%	2%	3%
Reunion/Graduation	3%	4%	5%	3%	3%	3%	3%	1%
Water Sports	3%	4%	5%	2%	2%	*	2%	3%
Fishing	3%	3%	4%	2%	3%	3%	1%	5%

Chart 51 • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 household count

Top Activities at the Destination

ACTIVITY PARTICIPATION

	U.S.	New Jersey	NJ w/o Atl City	New York	Pennsylvania	Maryland	Virginia	North Carolina
Theater/Dance Performance	3%	3%	1%	9%	3%	2%	1%	1%
Show: Boat, Car, Home	2%	3%	4%	3%	1%	2%	1%	1%
Winery/Distillery/Brewery Tours	4%	3%	4%	4%	4%	3%	3%	4%
Amateur Sports	4%	2%	3%	3%	4%	3%	3%	4%
Wildlife Viewing (birds, whales, etc.)	5%	2%	3%	4%	2%	3%	2%	7%
Spa	1%	2%	1%	1%	1%	*	*	1%
Museums, Art Exhibits, etc.	9%	2%	2%	15%	9%	7%	10%	11%
Hiking	5%	1%	2%	4%	4%	2%	4%	5%
Real Estate (buy/sell)	1%	1%	2%	1%	*	1%	*	*
Zoo/Aquarium	4%	1%	2%	1%	2%	3%	3%	4%
Golfing	2%	1%	1%	2%	1%	1%	1%	2%
Camping	4%	1%	1%	2%	4%	1%	2%	3%
Professional Sports Event	3%	1%	1%	3%	4%	2%	*	2%
Boating/Sailing	3%	1%	1%	2%	2%	3%	1%	2%
Funeral/Memorial	2%	1%	1%	3%	2%	2%	3%	2%
Business/Work	1%	*	*	*	*	*	*	1%
Service/Volunteerism/Charity	1%	*	*	1%	1%	1%	*	1%
Snow/Winter Sports	1%	*	*	1%	2%	*	*	*
Medical/Health/Doctor Visit	2%	*	*	1%	3%	1%	1%	1%
Eco/Sustainable Travel	1%	*	*	1%	*	*	*	1%
Extreme/Adventure Sports	1%	*	*	1%	1%	*	1%	*
Hunting	1%	0%	0%	*	1%	*	*	*

Chart 51 • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 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.

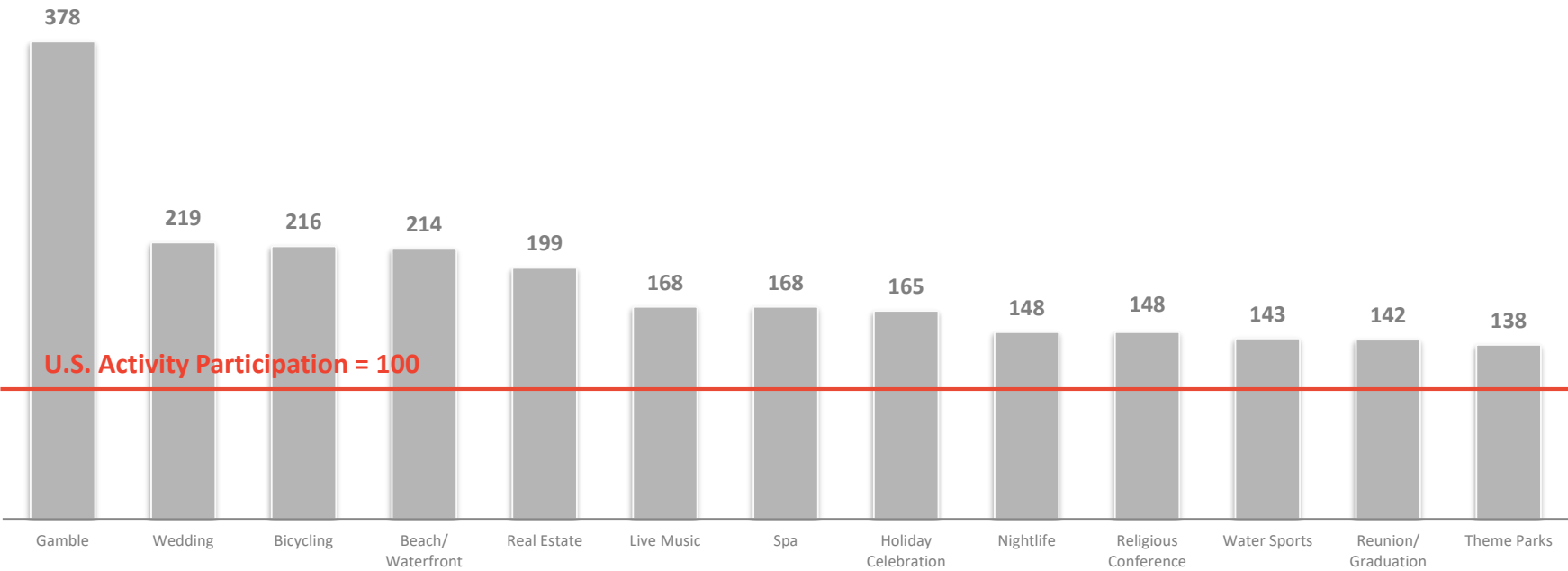


Chart 52 • Segment: 2018 Overnight Leisure Person-Stays • New Jersey n = 825 household count

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.

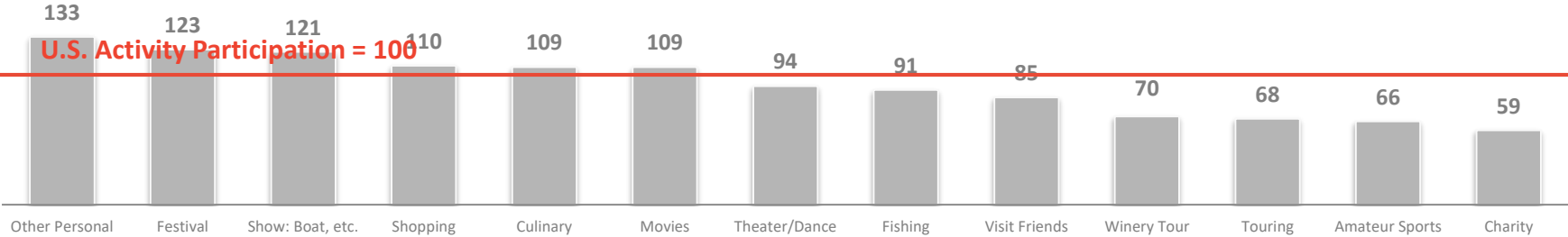


Chart 52 • Segment: 2018 Overnight Leisure Person-Stays • New Jersey n = 825 household count

New Jersey Avg. Party per Stay Spending by Activities

ACTIVITY PARTICIPATION

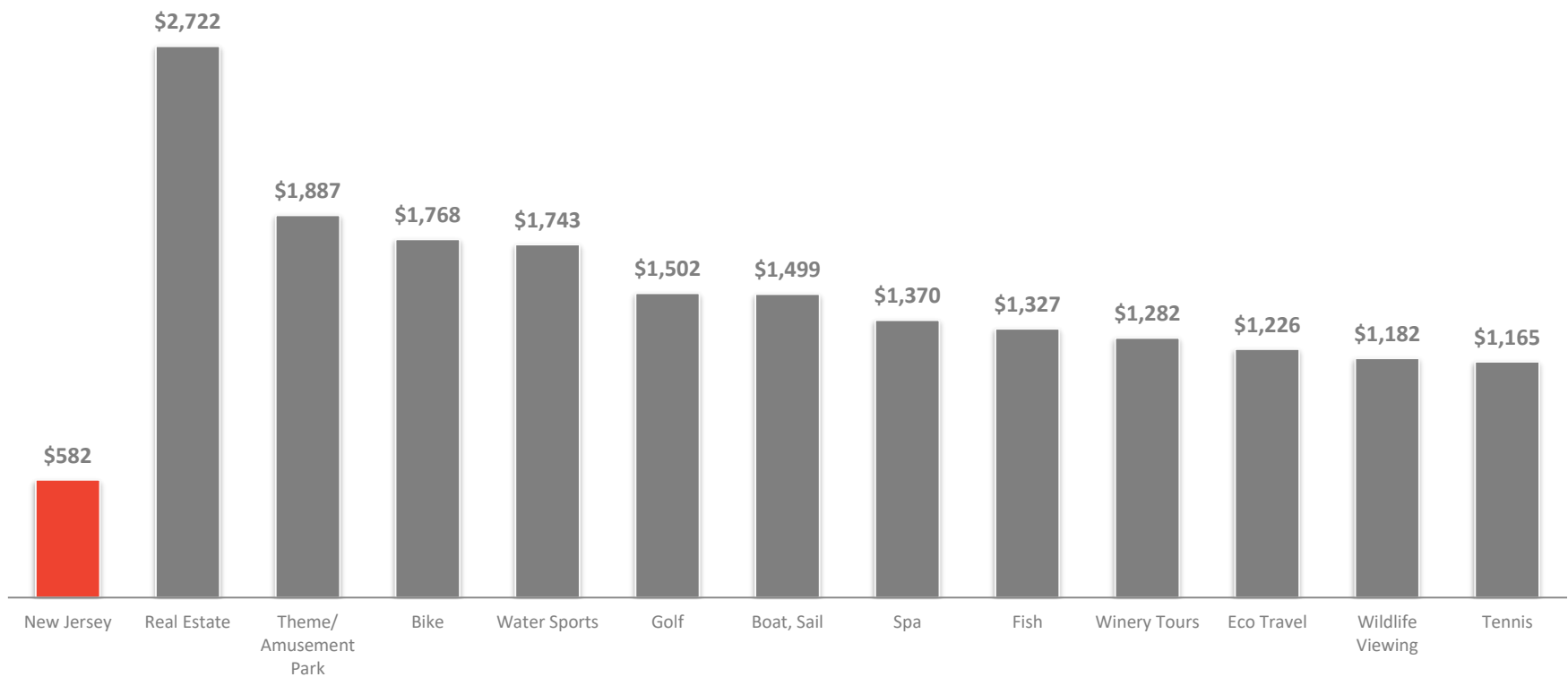


Chart 53 • Segment: 2016-2018 Overnight Leisure Stays (\$) • New Jersey n = 2,914 household count

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

ACTIVITY PARTICIPATION

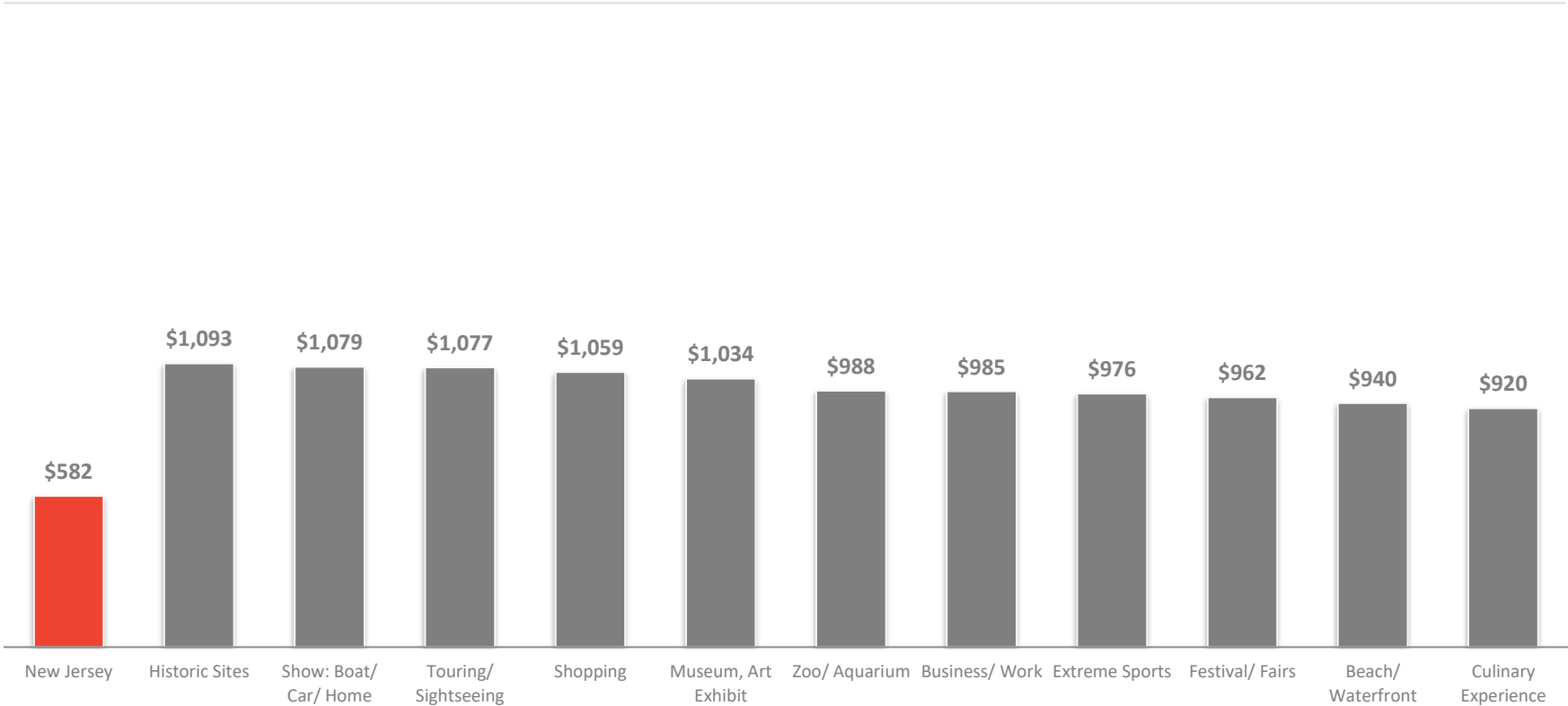


Chart 53 • Segment: 2016-2018 Overnight Leisure Stays (\$) • New Jersey n = 2,914 household count

New Jersey Activity Comparison

ACTIVITY PARTICIPATION

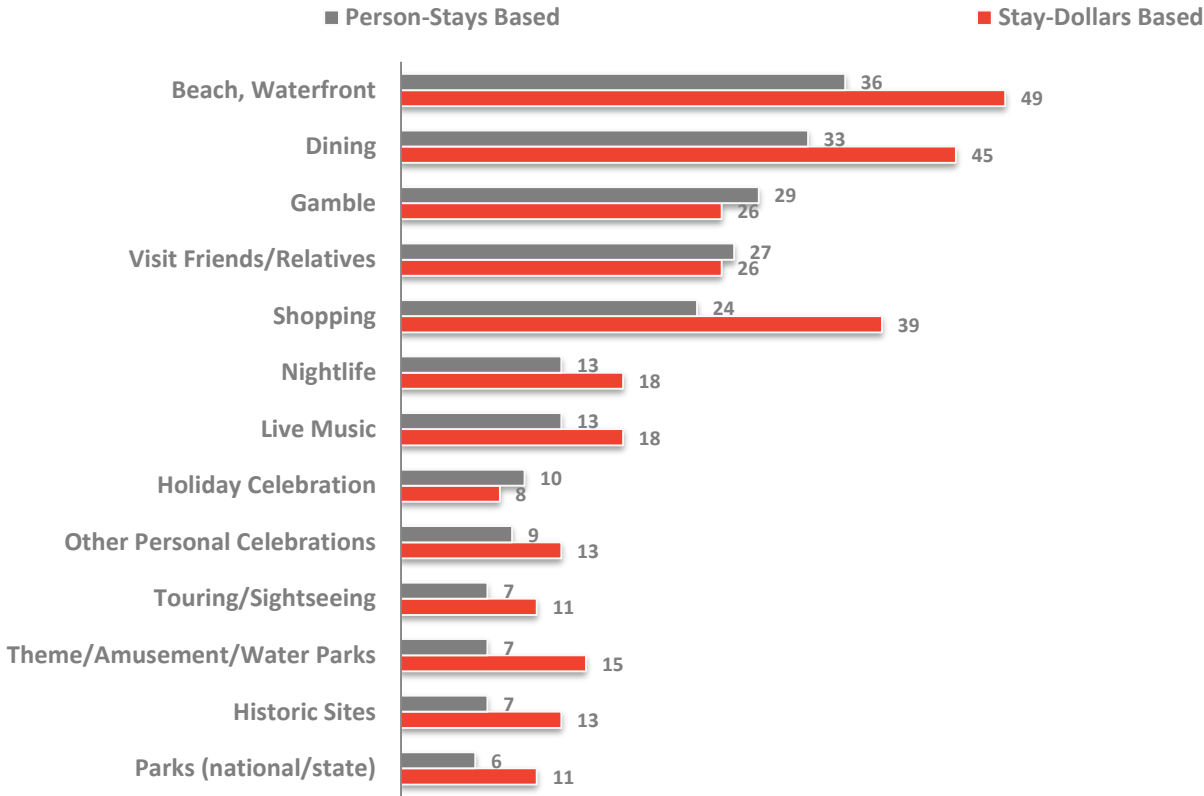


Chart 54 • Segment: 2016-2018 Overnight Leisure (%) • New Jersey n = 2,914 household count

New Jersey Activity Comparison (cont.)

ACTIVITY PARTICIPATION

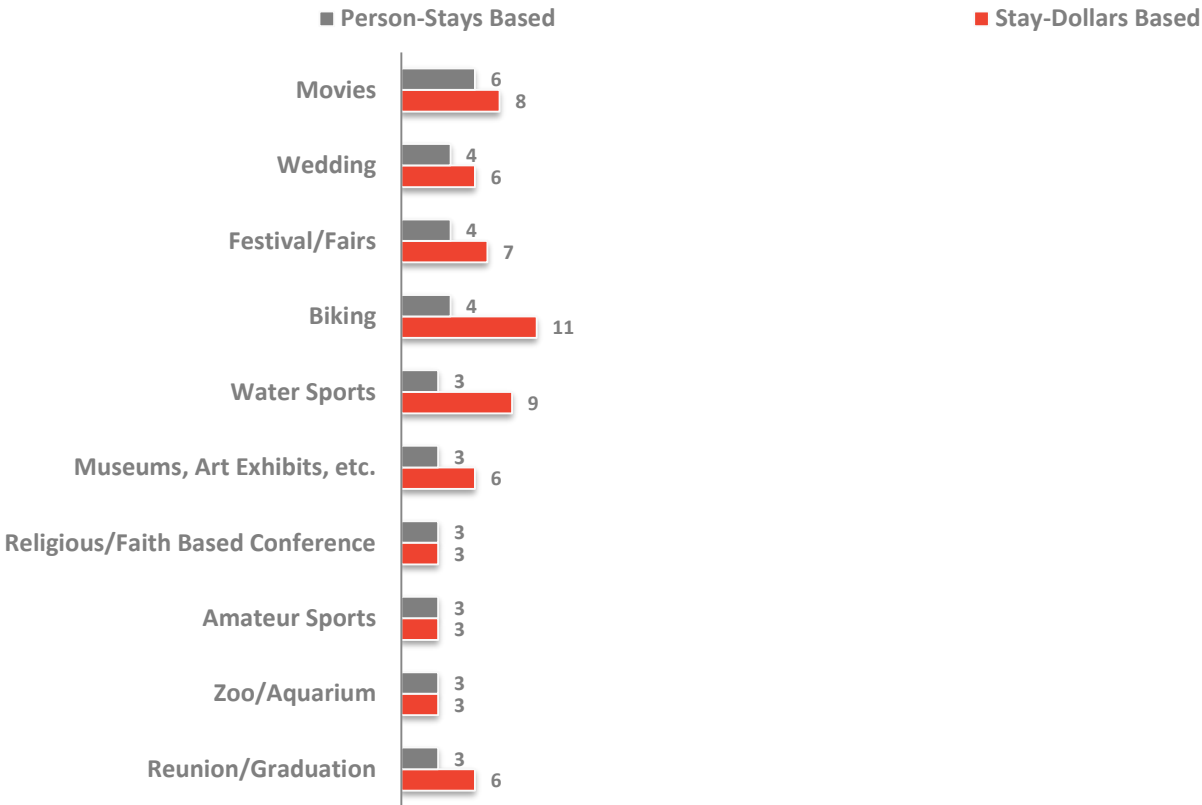


Chart 54 • Segment: 2016-2018 Overnight Leisure (%) • New Jersey n = 2,914 household count

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

ACCOMMODATION

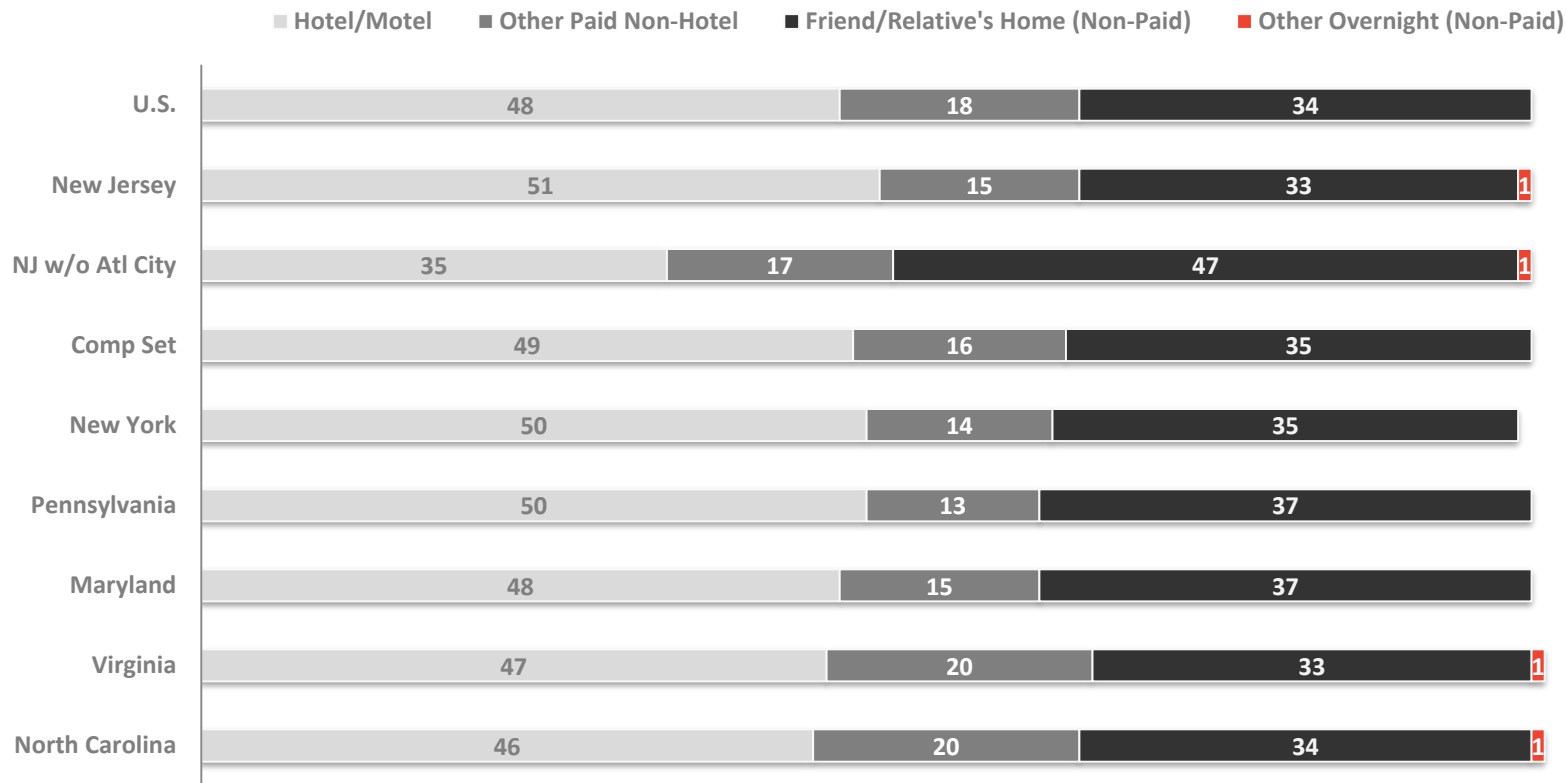


Chart 55 • Segment: 2018 Overnight Leisure Person-Stays (%) • New Jersey n = 825 household count

New Jersey Avg. Party per Stay Spending by Accommodation Type

ACCOMMODATION

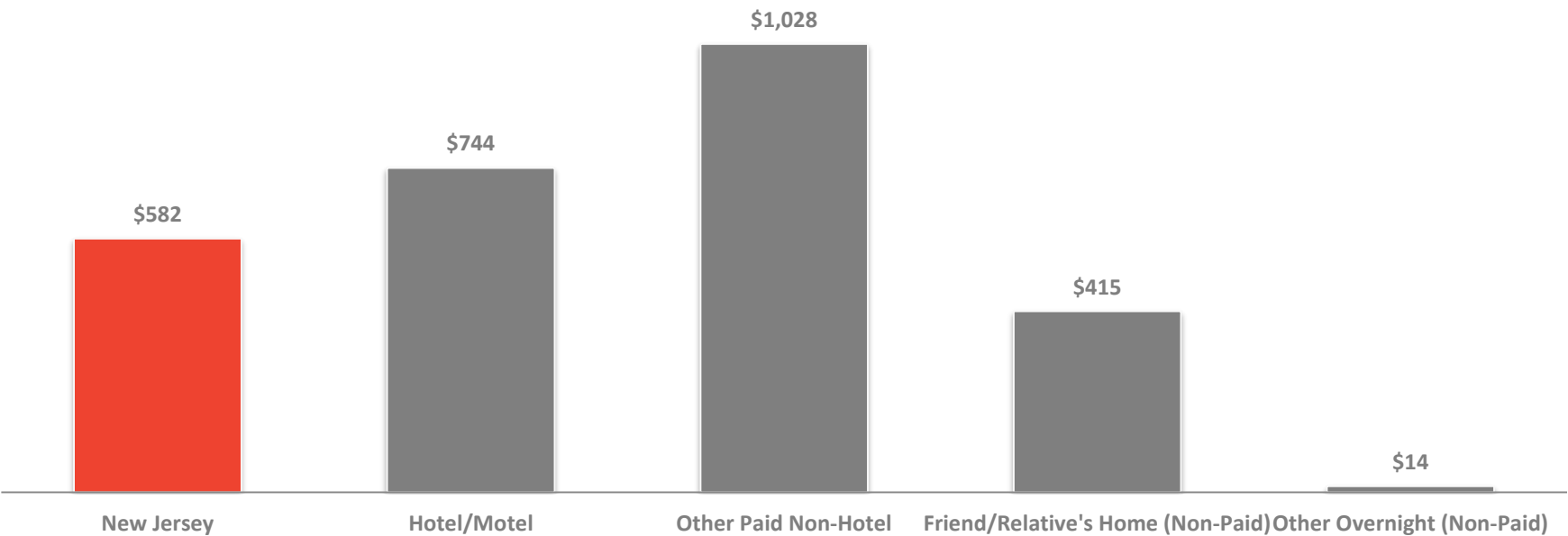


Chart 56 • Segment: 2016-2018 Overnight Leisure Stays (\$) • New Jersey n = 2,914 household count

New Jersey Accommodation Type Comparison

ACCOMMODATION

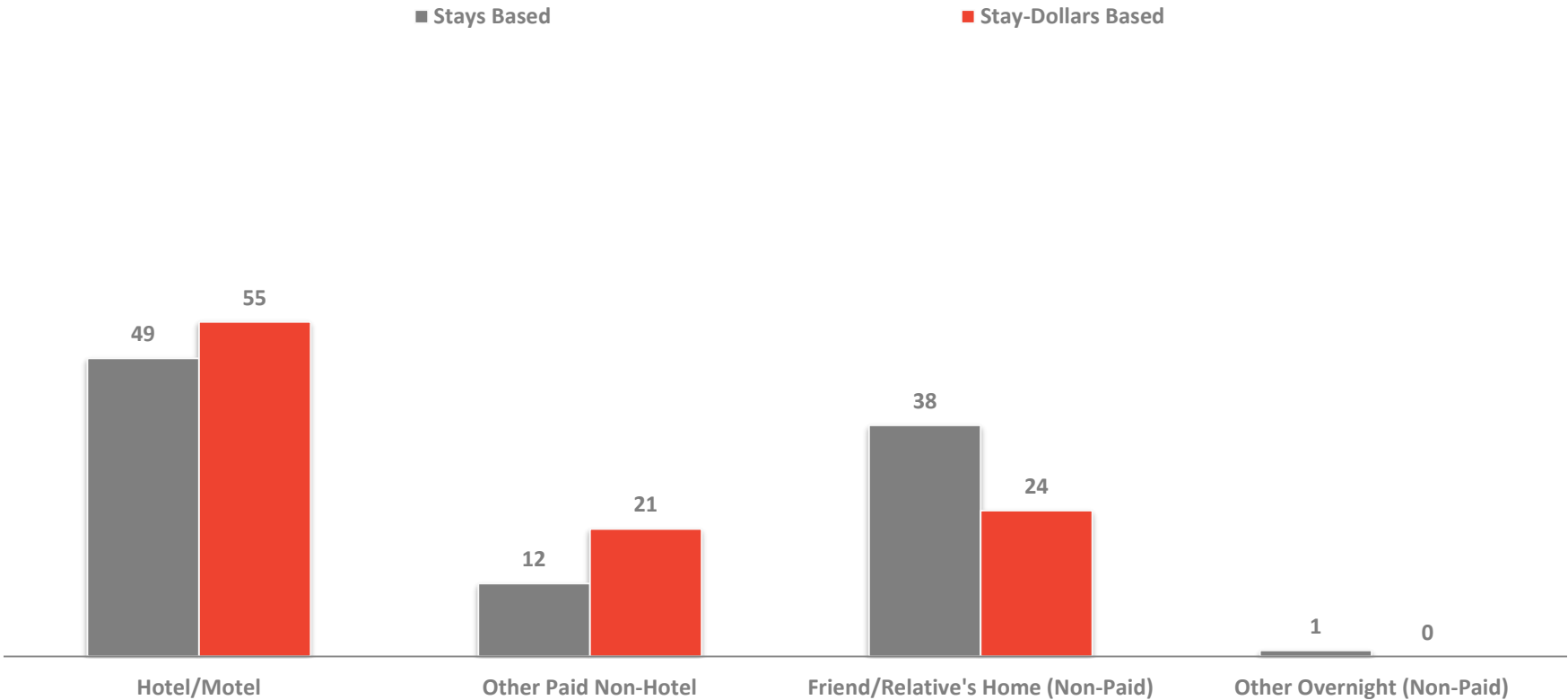


Chart 57 • Segment: 2016-2018 Overnight Leisure (%) • New Jersey n = 2,914 household count

Appendix

Glossary

Household Count	The number of unique respondents responding to the survey who visited the destination during the travel year.
Stays	Stays represent the number of distinct groups of travelers (travel parties or groups) visiting a destination on a trip, regardless of the number of people within the travel group.
Person-Stays	The total number of people or visitors that traveled to your destination, regardless of the length of their stay.
Person-Days	The total number of days that all visitors contributed to your destination.
Trip-Dollars	Using the Trip-Dollars weight shows the monetary worth/contribution of travelers to a destination's economy as opposed to the contribution of number of trips or number of days spent at the destination.
Room-Nights	The number of nights spent in a room, regardless of the number of people staying in the room.
Stay Expenditures	Combines per-person spending with Person-Days to calculate the money spent on each stay to your destination.
Generations	Millennial (1981-1996), GenX (1965-1980), Boomer (1946-1964), Silent/GI (before 1945)

Statistical References

Example:
If the air travel finding for the U.S. is 11% and the sample size is 34,564, using the chart, we can say that at the 90% level of confidence the proportion ranges between 10.8% and 11.1%.

Example:
If the air travel finding for New Jersey is 7% in previous time period and 6% in current time period, using the chart, we can say that the actual proportion change is not statistically significant since the resulting Z score (-0.90) is smaller than the table Z score (1.64).

Confidence Interval

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

Leisure Travel	Sample Size for 2018	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.	34,564	0.1%	0.2%	0.2%	0.3%	0.4%
New Jersey	825	0.6%	1.0%	1.5%	2.2%	2.9%
New York	2,495	0.3%	0.6%	0.9%	1.2%	1.6%
Pennsylvania	1,561	0.4%	0.8%	1.1%	1.6%	2.1%
Maryland	783	0.6%	1.1%	1.5%	2.2%	2.9%
Virginia	1,055	0.5%	0.9%	1.3%	1.9%	2.5%
North Carolina	1,477	0.4%	0.8%	1.1%	1.6%	2.1%

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	6.0%	7.0%		(+/-) 1.96	95%
Sample Size (n)	825	1,267	-0.90	(+/-) 1.64	90%

Research Methodology

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

DK Shifflet 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 DK Shifflet.

Both traveling and non-traveling households are surveyed each month enabling DK Shifflet 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.

About DK Shifflet

DK Shifflet, an MMGY Global Company, is the leading U.S. consumer travel research firm. DK Shifflet is located in McLean, VA and has, for more than 30 years, 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, auto clubs, hotel chains and more.

"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. DK Shifflet's Quality control committee conducts bi-monthly meetings to review survey results and examine methods to maintain and improve quality control.