

2019 NEW JERSEY VISITOR PROFILE

Executive Summary

Charts & Graphs

Appendix

*INSIGHTS
THAT TAKE
YOU
PLACES*

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Fiscal Year 2019 Visitor Profile.

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

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This New Jersey Day Leisure Visitor Profile provides intelligence on US and New Jersey travel trends from Fiscal Year 2019. 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 2019, New Jersey hosted a total...
52 Million Day visitors, spending...
\$3.9 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 2019 New Jersey Day Leisure Visitor Profile is based on a sample of 771 traveling households. Data are based on a fiscal year comprised of fourth quarter 2018 through third quarter 2019. DKSA finalizes, and makes all quarterly data adjustments, after data collection for the fourth quarter of the year. Therefore fiscal year 2019 data are considered 'preliminary' meaning that it is subject to year end 2019 adjustments. These adjustments are reflected in the subsequent year's Visitor Profile report.

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Executive Summary

Like the Overnight Leisure report, 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.

Day Leisure travelers to New Jersey without Atlantic City mimic closely the behaviors of Day Leisure visitors

of the entire State, yet somewhat different than travelers visiting destinations within the Competitive Set.

The following segments below dominate the mass market in New Jersey and are customers with a high share in visitation that deserve attention by travel marketers to continue the path of growth:

New Jersey Fiscal Year 2019 Highlights:

- Record high visitation and spending in 2019
- Continued growth in Day Leisure visitor volume and spending
- New Jersey has dropped to 5th place in market share among its competitors, ahead of Maryland
- Age: mature travelers; Boomers (born 1946-1964) and GenX (1965-1980) generations; Affluent Mature Lifestage
- Income: \$109K on average; much higher than the US average and competitors, except New York and Maryland
- Employment: share of employees outpaces the US level
- Purpose of Stay: majority travel for Vacation/Getaway, Other Leisure, or to Visit Friends/ Relatives
- Activity: most travel parties go to Beach/Waterfronts, visit Friends & Relatives, participate in a Culinary/Dining Experience, Gamble or go Shopping
- Traveling Party: single adults and one male/ one female
- Expenditures: \$115 per person/day (35% Food/Beverage, 28% Transportation, and 17% Entertainment)

STUDY SPECIFICATIONS

Travel definition: A Day trip defined as going someplace and then returning home in the same day

Sampling Frame: All U.S. domestic Day Leisure travelers during Fiscal Year 2019 in New Jersey.

Timeframe: Fiscal Year 2019 (Q4 2018 – Q3 2019)

Executive Summary

New Jersey Fiscal Year 2019 Highlights (continued):

- Timing: New Jersey is a preferred Summer destination
- New Jersey, New York, and Pennsylvania are primary Origin States for travel
- Largest share of visitors originate from New York/NY, followed by Philadelphia/PA DMA
 - New Jersey's travelers arrive almost exclusively by auto – traveling 74 miles on average
- New Jersey receives higher average destination ratings without Atlantic City (Feeling of Safety in New Jersey rated higher than Value-for-the-Money)
- Half plan trip to New Jersey in less than 1 week

The characteristics of Day Leisure visitors to New Jersey do not vary much depending on whether Atlantic City is included in the Analysis.

Visitors to the Atlantic City region tend to be retired, visit for day trips, and are less likely to have children in their travel parties. The average age of New Jersey visitors remained the same in 2019 at 52 years old, which is older than visitors to the average U.S. destination or to the Competitive Set by one and two years, respectively. New Jersey visitors are more likely to have children in the household (35%, a decrease of 1 percentage point from 2018), which is more than the average U.S. destination or to the Competitive Set.

The reasons for these demographics are likely due to

visitor destination choices. The Shore region accounts for the largest share of visitation in the State, despite experiencing a decrease in its share of visitors to the State (from 26.6% in 2018 to 25.7% in 2019), followed by Greater Atlantic City, and Gateway regions. The Greater Atlantic City, Southern Shore, and Skylands regions displayed increases from 2018, while The Gateway and Delaware River regions experienced decreases.

Visitors to the non-Atlantic City regions tend to travel to visit friends and relatives. Conversely, visitors to the Greater Atlantic City region tend to visit for more day trips.

Executive Summary

Changes in travel can have a large impact on the types of activities engaged in and ultimately the money spent in the State.

In 2019, New Jersey 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.

After displaying a decrease in 2018, Gambling is back up in the 4th spot of activity participation. Looking at New Jersey excluding Atlantic City, gambling drops from 23rd in 2018 to 25th in 2019. 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.

Average Destination Satisfaction and Value ratings for the State remain high (8.49 and 8.05 respectively on a 10-point scale) despite both ratings decreasing in 2019 from 8.51 and 8.30 respectively. For both dimensions, the non-Atlantic City

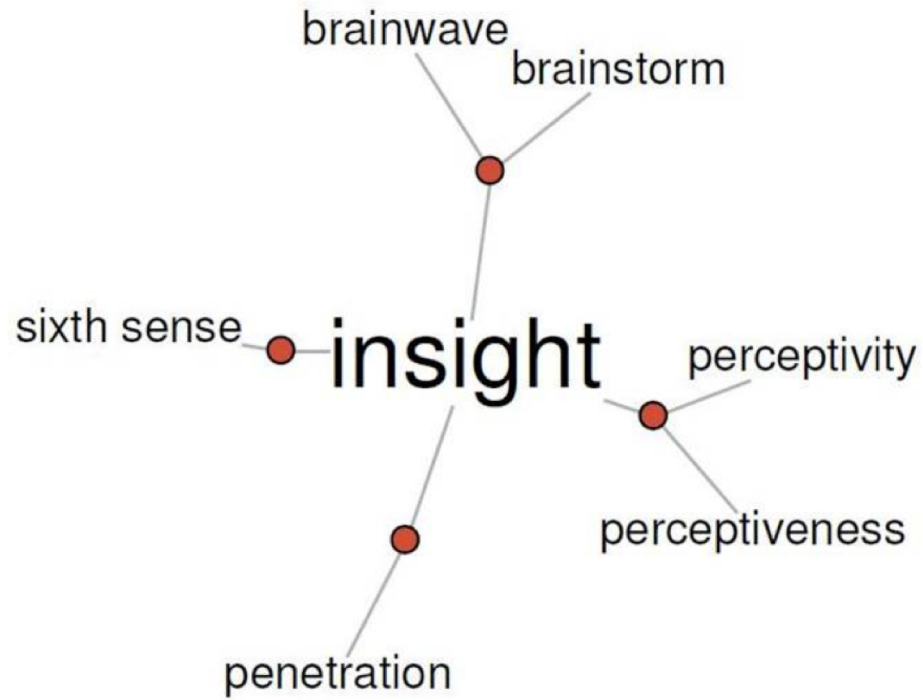
portion of the State saw similar decreases from 2018. Many variables can impact perceived satisfaction and value including changes in pricing or changes in the perceived quality or availability of a product or experience. Overall, visitors seem to be quite satisfied with their New Jersey experience.

In summary, despite significant challenges in recent years, New Jersey continues to see growth in visitation and spending.

While understanding the Day 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. Overall, New Jersey's Day Leisure segments are fairly balanced, except the following:

Focus on your Opportunity:

- Travelers visiting during the summer season
- Travel parties visiting for a Vacation/Weekend Getaway
- Travel parties consisting of couples/ MM/FF/ 3+ adults or with children present
- Travel parties participating in Beach/Waterfront, Dining, Shopping, Gambling, Other Personal Celebration, Nightlife activities, and Live Music



Travel Year Review

New Jersey 2019 Day Leisure Visitor Profile

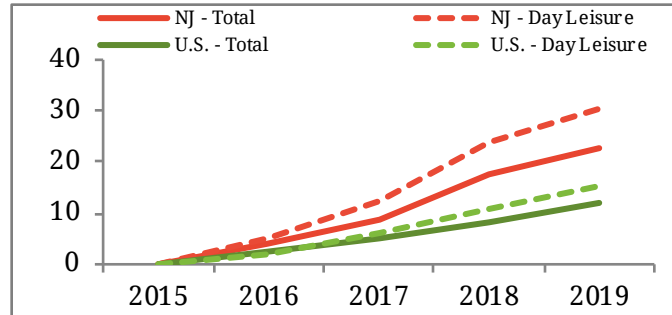
Visitor Volume and Spending

New Jersey hosted 52 million day leisure visitors, spending almost 3.9 billion dollars in 2019 – another all time high for both visitors and spending in the State. Volume grew at a higher rate (5.4%) than the average U.S. destination (4.2%) over 2018. For the past two years spending in New Jersey has grown slower than the average U.S. destination. However, all but New Jersey's business travel segments increased their spending in 2019.

Day Leisure travelers make up about 45.5% of all New Jersey's travelers – a share that's fairly consistent over the past years. In terms of their spending, day leisure travelers contribute only 16.1% to New Jersey's Total Spending.

Visitor Volume

PERSON-STAYS (millions) INDEXED TO 2015

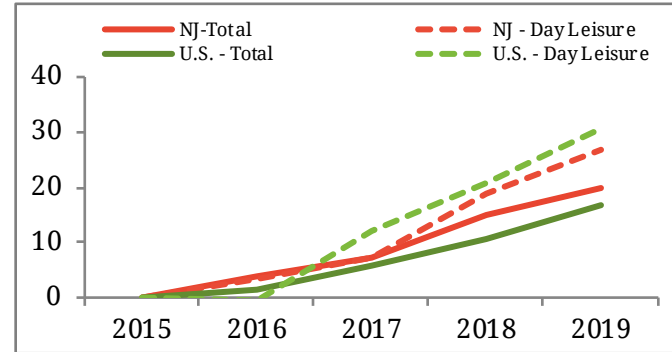


114.8 Million Total Visitors — 4.4% ↑

52.2 Million Day Leisure — 5.4% ↑

Visitor Spending

DIRECT SPENDING (billions) INDEXED TO 2015



\$24.2 Billion Dollars Total — 4.3% ↑

\$3.9 Billion Day Leisure — 6.9% ↑

GLOSSARY

Note: Data in these graphs indexed to 2015 – data shows yearly change as compared to 2015 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 2019 quarterly adjustments

Destination Market Share

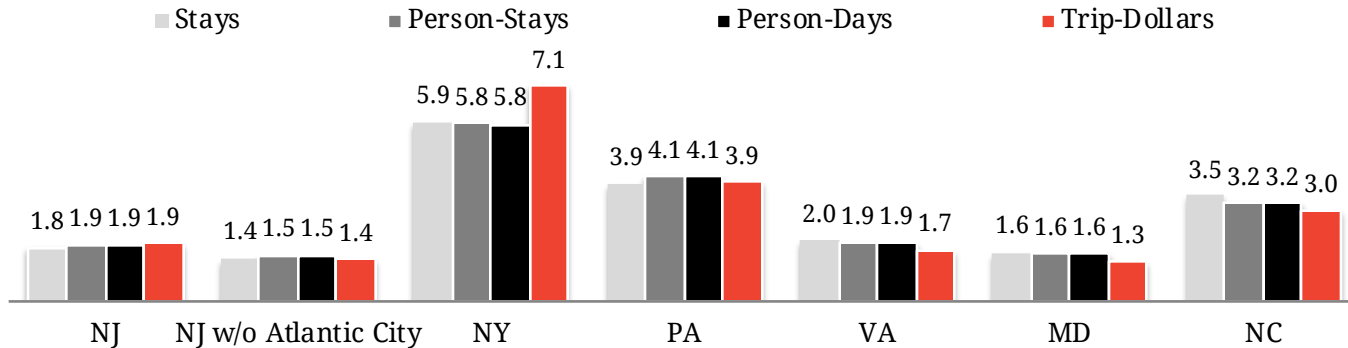
Overall, the impact of New Jersey's visitation on the share of the US travel market continued to decline in 2019. Among all its competitors, New Jersey's Day Leisure traveler segment captured the fifth largest shares of the US travel market in Stays, tied for fourth in Person-Stays and Person-Days, and took the fourth spot in Trip-Dollars. New Jersey with and without Atlantic City displayed the only decrease in market share compared to 2018 in all segments, while Virginia and North Carolina increased in market share and the remaining were constant.

New Jersey's Day Leisure travel parties (or Stays) represent 1.75% of the US Day Leisure travel market.

People often travel together with family, friends or with other groups. Thus, the Stays metric considers 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 Day Leisure travelers (or Person-Stays), the main focus of this report, represent 1.85% of the US Day Leisure travel market.

Market Share of U.S. Travel
DAY LEISURE 2019 (%)



New Jersey lost market share in the Day Leisure segment in all four metrics

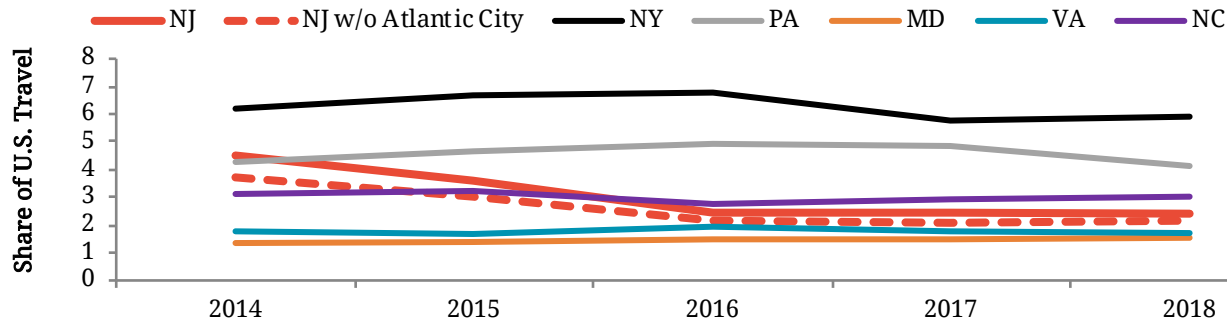
Destination Market Share

The Person-Days metric is simply the total number of days that visitors contributed to New Jersey. New Jersey's Day Leisure travelers represent 1.85% of the US Day market share. New Jersey Day Leisure travelers contributed the largest of all four metrics in Trip-Dollars to the US Day 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.

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.

Competitive Market Share

DAY LEISURE PERSON-STAYS (%)



Atlantic City contributes about 1/6th (Person-Stays, Person-Days, and Stays) to 1/4th (Trip-Dollars) of New Jersey's Day Leisure market shares

Demographics

Who are New Jersey's Overnight Leisure visitors?

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

In 2019, 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 GenX and Boomers, but also in higher shares of travelers who have children in the household.

Average incomes of New Jersey visitors decreased in 2019 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 Day Leisure stays have decreased as well.

How do New Jersey's Day 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)	52	51	51	50
Employed	61%	64%	57%	61%
Retired	27%	24%	28%	27%
Average Income (000)	\$108.6	\$110.5	\$93.5	\$102.2
Children in HH	35%	37%	33%	33%
Children in Travel Party	16%	19%	15%	15%
Generations:				
Millennial (1981+)	23%	24%	28%	28%
GenX (1965-1980)	29%	30%	26%	28%
Boomer (1946-1964)	39%	38%	37%	38%
Silent/GI (1945 back)	9%	7%	8%	7%

New Jersey Visitors...

More GenX and Boomer

More Employed

Higher HH income

Include more Kids in HH

than the US

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.

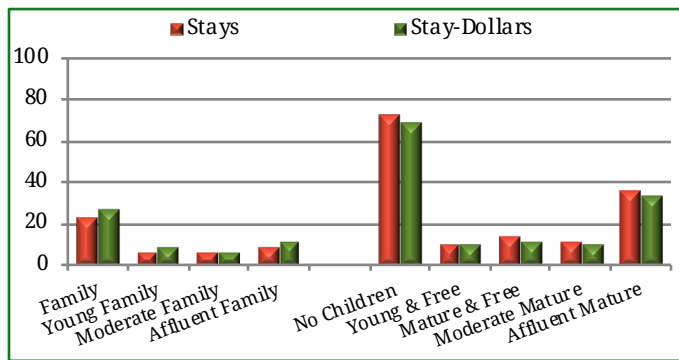
Visitors are more likely to belong to Lifestages with no children in the household for New Jersey, with and without Atlantic City included. It is important to notice, however, that where the share of Stay-Dollars is less than the share of Stays these Lifestages are less valuable for the State. The Affluent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

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

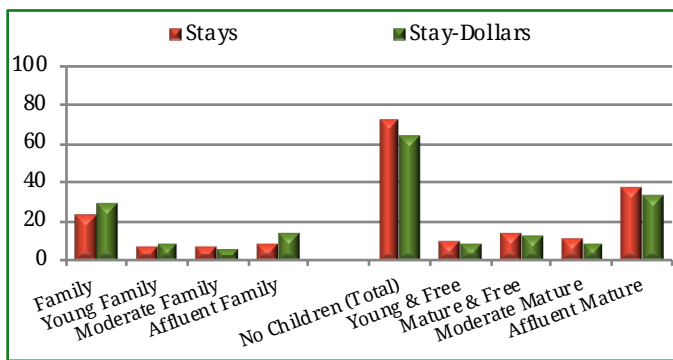
New Jersey

DAY LEISURE (%) (2017-2019)



New Jersey without Atlantic City

DAY LEISURE (%) (2017-2019)



Affluent Family:
Most profitable

Destination/Origin

Where do New Jersey's visitors come from?

More than 9 out of 10 New Jersey visitors come from 5 states with about 51% coming from New Jersey itself and an additional 40% coming from the neighboring states of New York and Pennsylvania.

It is not surprising then that the majority of travel to New Jersey is by car and those travel an average one-way distance of 74 miles – significantly less than the average of all of its competitors. Eight in ten travelers live in a vicinity of less than 100 miles.

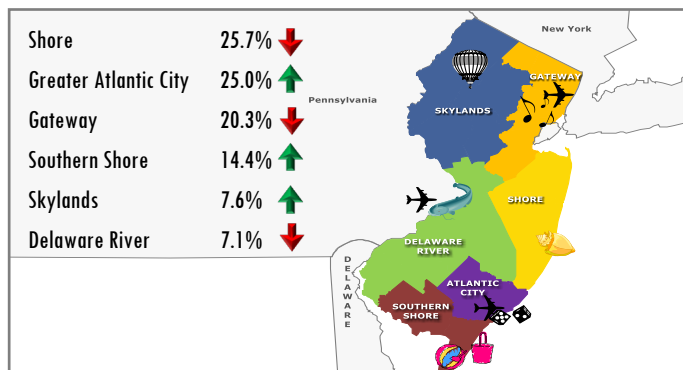
New Jersey Origin States

DAY LEISURE PERSON-STAYS (%) (2019)

New Jersey	50.6%
New York	24.3%
Pennsylvania	15.7%
North Carolina	2.6%
Maryland	2.2%
Delaware	1.6%
Connecticut	1.2%
Other	1.8%

New Jersey Destination Regions

DAY LEISURE PERSON-STAYS (%) (2019)



Where do New Jersey's visitors go?

The Greater Atlantic City Region saw a substantial increase in 2019 after years of consistent decreases, raising it from 5th to 2nd place when compared to New Jersey's six regions.

Southern Shore and the Skylands also saw increases in visitation in 2019, while the Shore, Gateway, and Delaware River saw decreases in visitation.

40% of New Jersey visitors
come from the neighboring
States

Travel Purpose

Why do travelers visit New Jersey?

Vacation/Getaway – day trips accounted for one third of Day Leisure visitors to New Jersey in 2019. Excluding Atlantic City doesn't alter New Jersey's Day Leisure visitor purpose of stay.

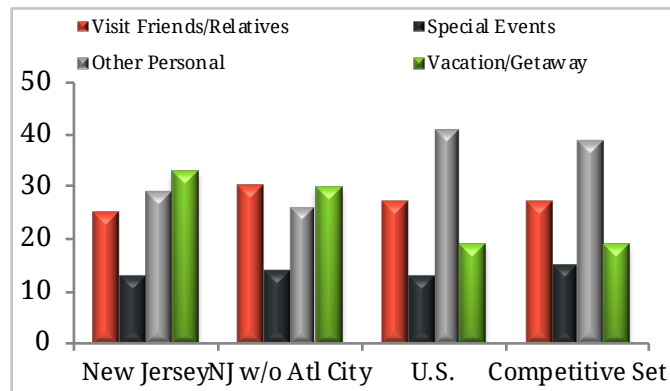
Although Purpose of Travel remained stable in 2019, the percentage of Day Leisure travelers Visiting friends/relatives decreased while vacation/getaways increased.

Visitors seeing Friends/Relatives increase when Atlantic City is excluded, but the share of those traveling for Other Leisure/Personal reasons is similar regardless of whether or not Atlantic City is included in the analysis.

In 2019 visitors spent on average \$115 in New Jersey per person per day - \$19 more than in 2018 with increases in Food & Beverage (+\$7), Entertainment (+\$6) and Other expenses (+\$3) while shopping remained fairly stable. Atlantic City is driving the average daily spending for the State. Again demonstrating the value of the Atlantic City area.

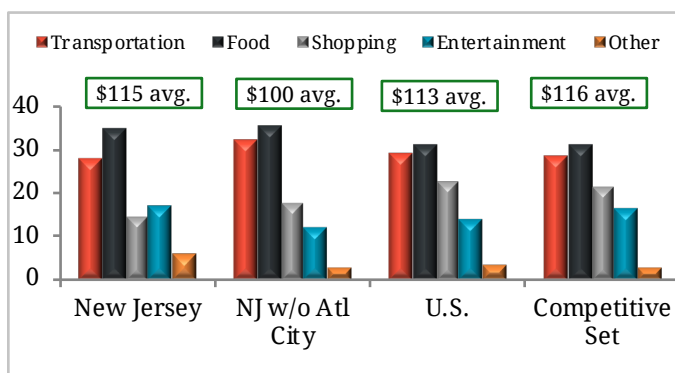
Purpose of Travel

DAY LEISURE PERSON-STAYS (%) (2019)



Per-Person-Per-Day Spending

DAY LEISURE PERSON-DAYS (%) (2019)



Atlantic City area drives
Day Trips
and Spending

Party Composition

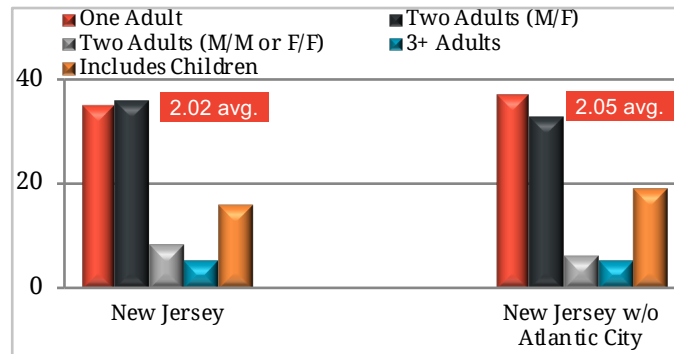
Who do they travel with?

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

The slightly higher average travel party size of travelers visiting the rest of NJ (excluding Atlantic City) of 2.05 people is due to slightly higher share of travel parties including children.

Travel Party Composition

DAY LEISURE STAYS (%) (2019)



What do New Jersey visitors do?

Almost all of Day Leisure travel parties participate in an activity when visiting the State.

Day Leisure travel parties who visit New Jersey participated in the following top five activities in 2019:

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

After falling to the fifth spot in 2018, Gambling is back up to the fourth most participated in activity for Day Leisure travelers to New Jersey.

When excluding Atlantic City, Beach/Waterfront dropped to 2nd place in top activities in 2018, but has increased back to 1st place in 2019:

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

New Jersey's Day 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 (3.0 times)
- Beach/Waterfront (2.9 times as high)
- Theme/Amusement/Water Parks (2.5 times)
- Water Sports (2.0 times)
- Bicycling (2.0 times)
- Wedding (2.0 times)
- Nightlife (1.6 times)
- Holiday Celebration (1.2 times)

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

- Beach/Waterfront (3.0 times as high)
- Water Sports (3.0 times)
- Theme/Amusement/Water Park (2.8 times)
- Boating/Sailing (2.0 times)
- Wedding (2.0 times)
- Nightlife (1.2 times)
- Holiday Celebration (1.2 times)
- Visiting Friends/Relatives (1.1 times)

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

Performance Ratings

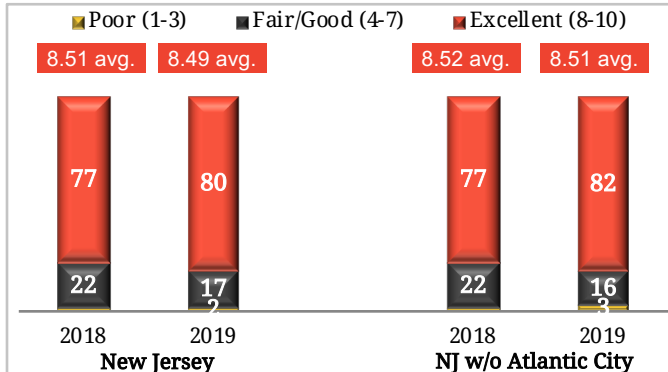
How do New Jersey visitors rate the State?

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'.

Day Leisure visitors report strong satisfaction (80% excellent rating) with their New Jersey stay in 2019. 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. Average satisfaction ratings, whether or not Atlantic City is included, displayed a small decreases in 2019 to 8.49 (New Jersey whole) and 8.51 (New Jersey without Atlantic City).

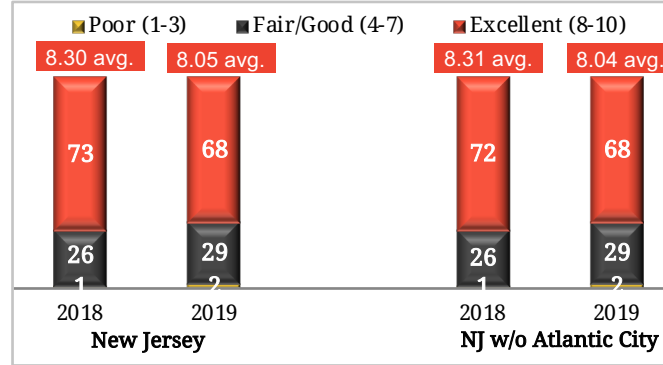
Overall Satisfaction

DAY LEISURE PERSON-STAYS (%) (2019)



Value for the Money

DAY LEISURE PERSON-STAYS (%) (2019)

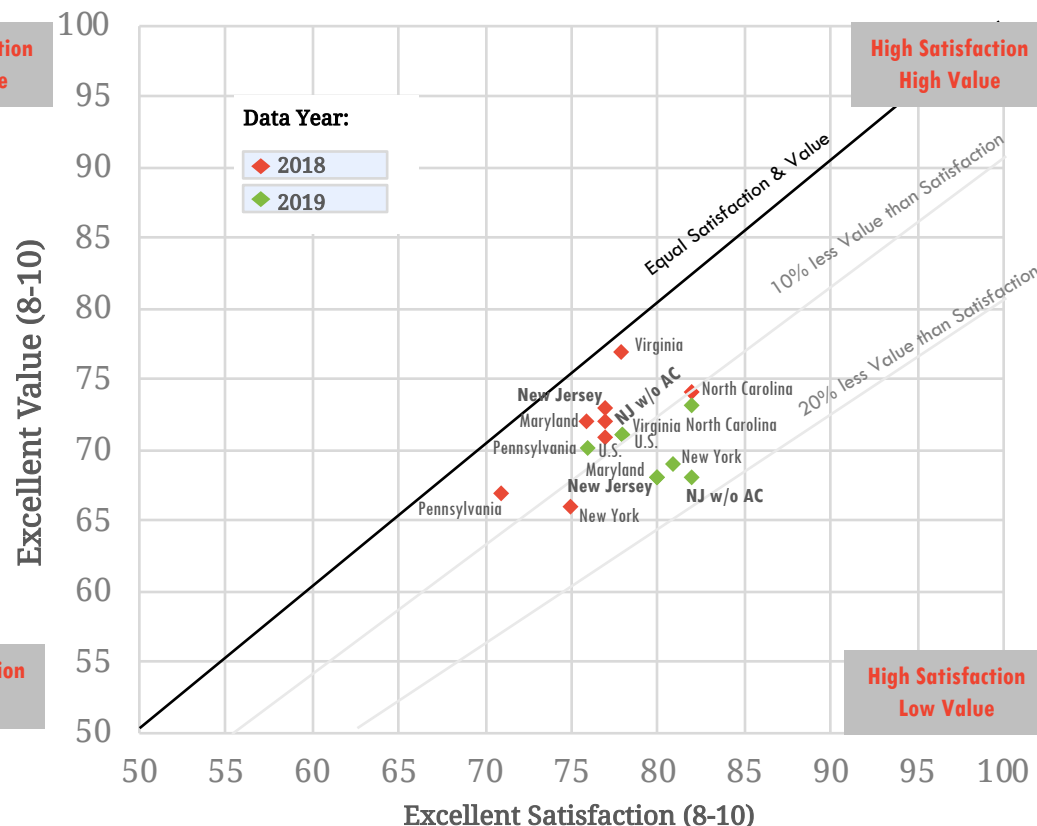


Overall, New Jersey's Day Leisure travelers report their highest ratings for Satisfaction (8.49), followed by Feeling of Safety (8.40), and value-for-the-money (8.05). All ratings decreased in 2018.

When excluding Atlantic City, visitors rate New Jersey slightly higher in satisfaction and feeling of safety.

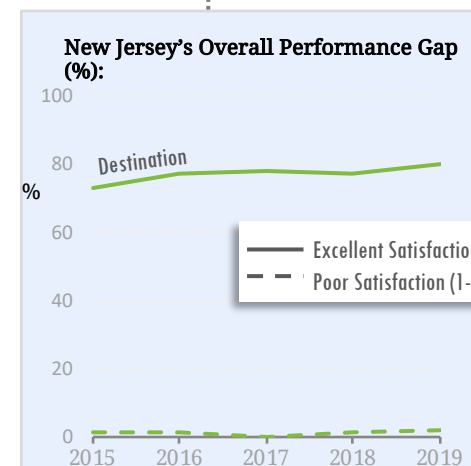
Satisfaction remained constant while Value displayed a significant decrease from 2018.

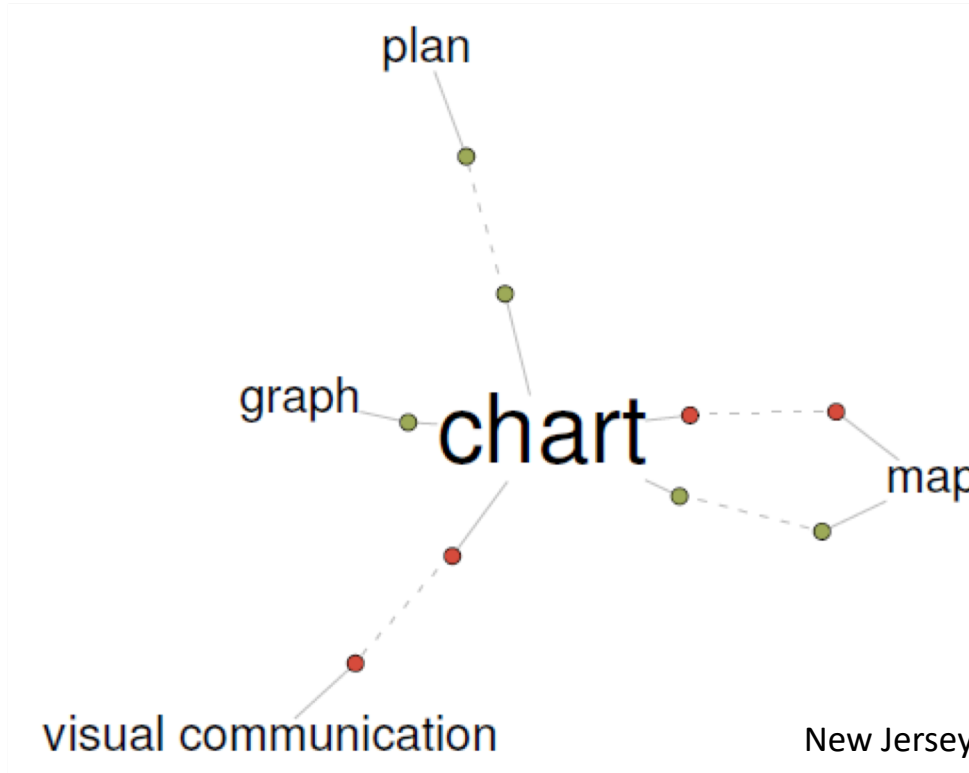
Performance Ratings



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 2019 Day Leisure Visitor Profile

U.S. Travel Segments

VOLUME

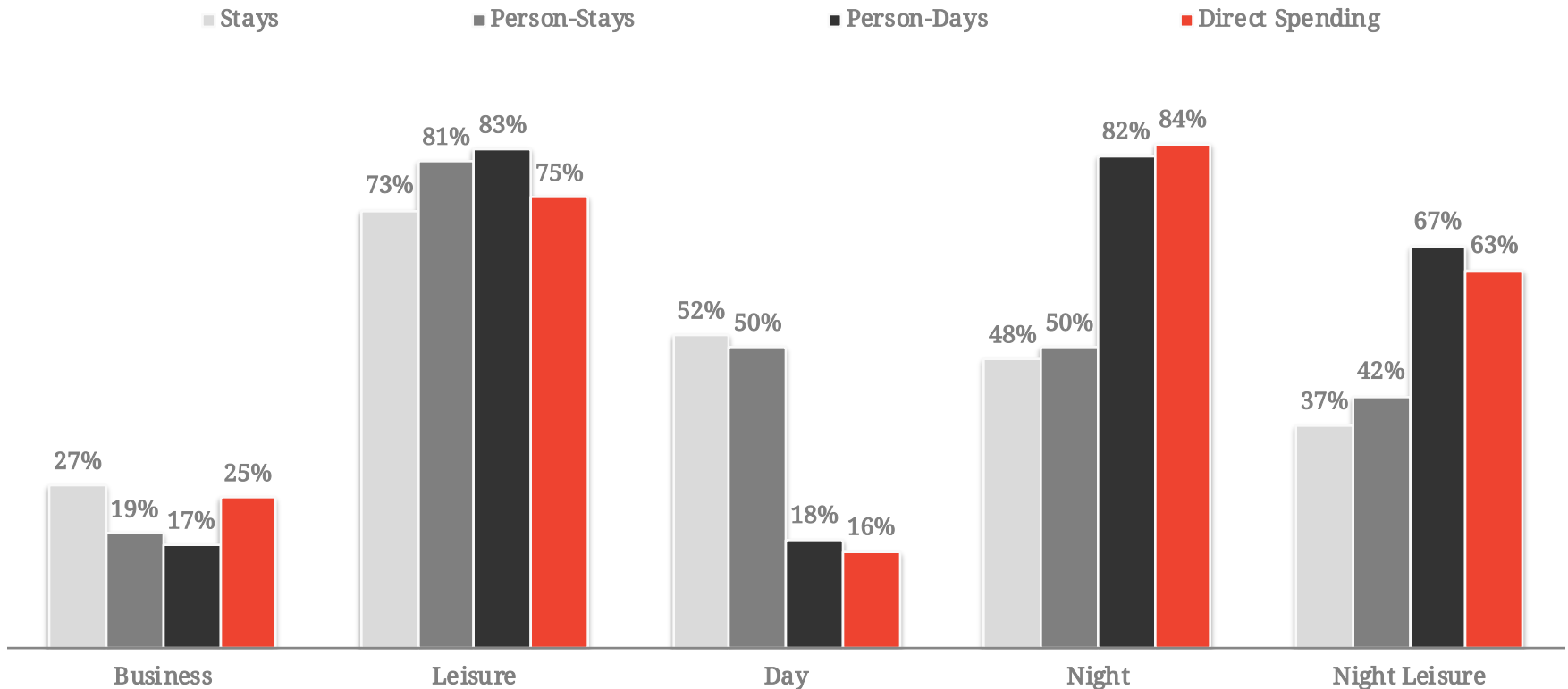


Chart 1 • Segment: 2019 Total Volume (%)

New Jersey Travel Segments

VOLUME

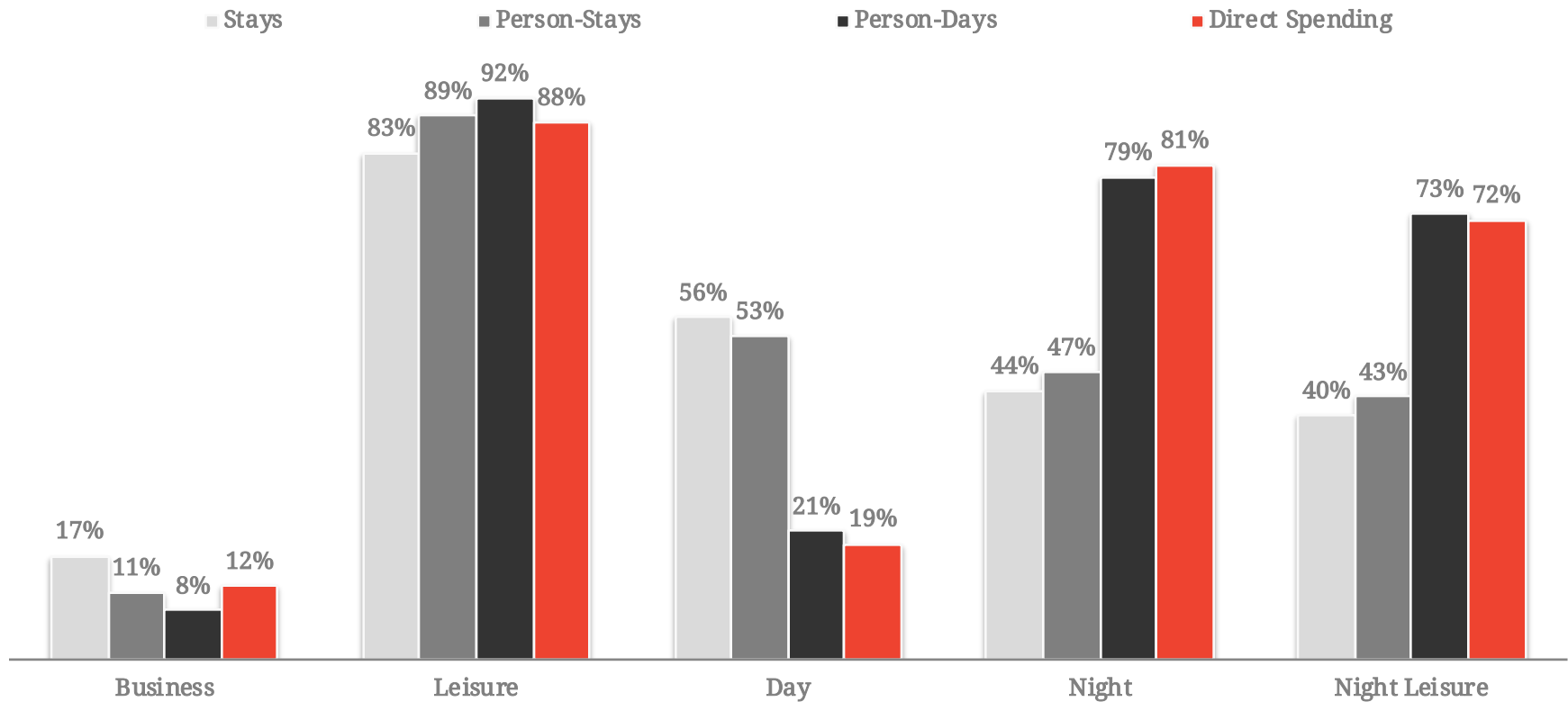


Chart 2 • Segment: 2019 Total Volume (%)

New Jersey Person-Stays Volume

VOLUME

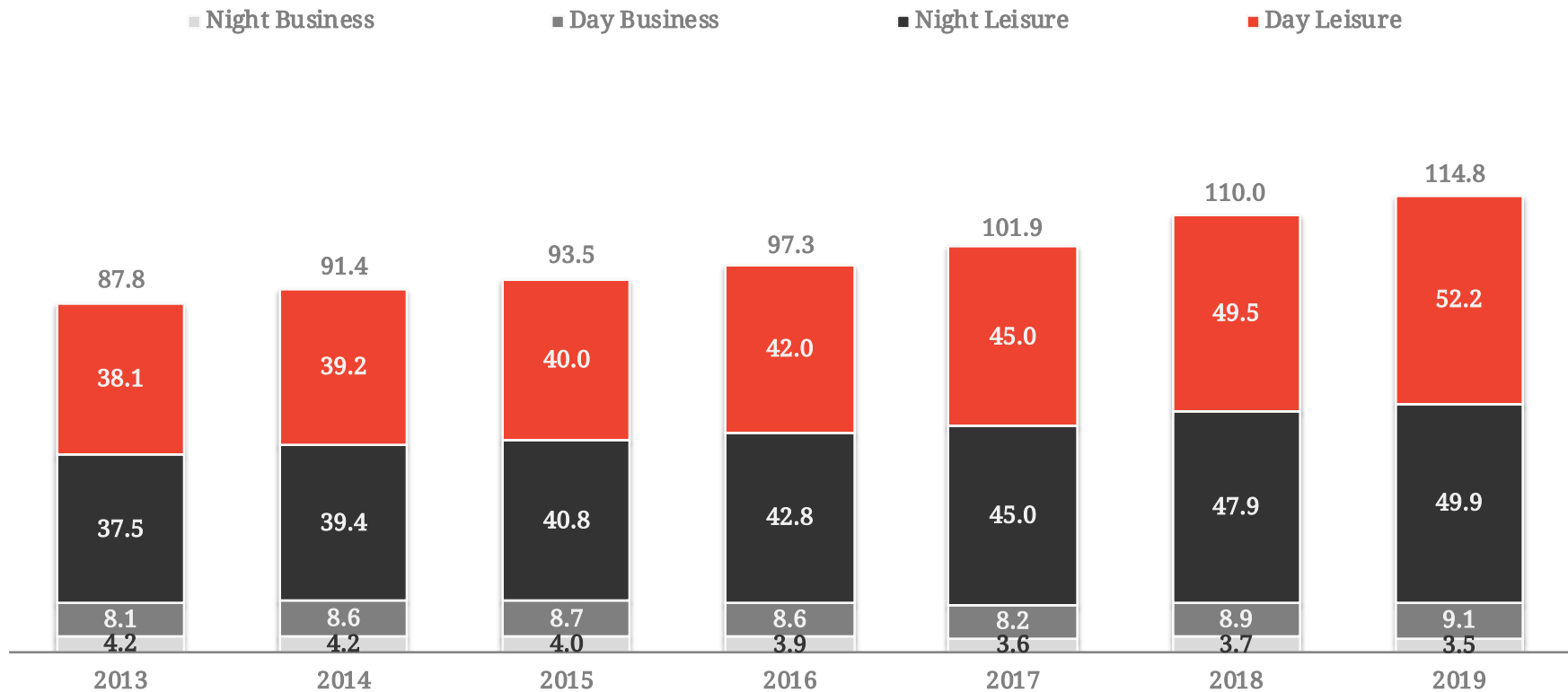


Chart 3 • in Millions

New Jersey Person-Stays Volume

VOLUME

New Jersey							U.S.
	14/13	15/14	16/15	17/16	18/17	19/18	19/18
Total	4.1%	2.3%	4.0%	4.7%	8.0%	4.4%	4.8%
Business	4.6%	-0.4%	-1.8%	-5.4%	6.5%	0.5%	2.1%
Leisure	4.0%	2.8%	4.9%	6.2%	8.2%	4.9%	5.9%
Day	3.6%	2.0%	3.8%	5.1%	9.8%	5.0%	5.3%
Night	4.6%	2.7%	4.3%	4.2%	6.0%	3.6%	4.4%
Day Business	7.0%	1.4%	-1.1%	-4.8%	8.2%	2.7%	3.8%
Day Leisure	2.8%	2.2%	4.9%	7.1%	10.1%	5.4%	5.9%
Night Business	0.0%	-4.2%	-3.2%	-6.7%	2.6%	-4.5%	-0.3%
Night Leisure	5.1%	3.4%	5.0%	5.2%	6.3%	4.3%	5.9%

Chart 4 • % change

New Jersey Direct Spending Volume

DIRECT SPENDING

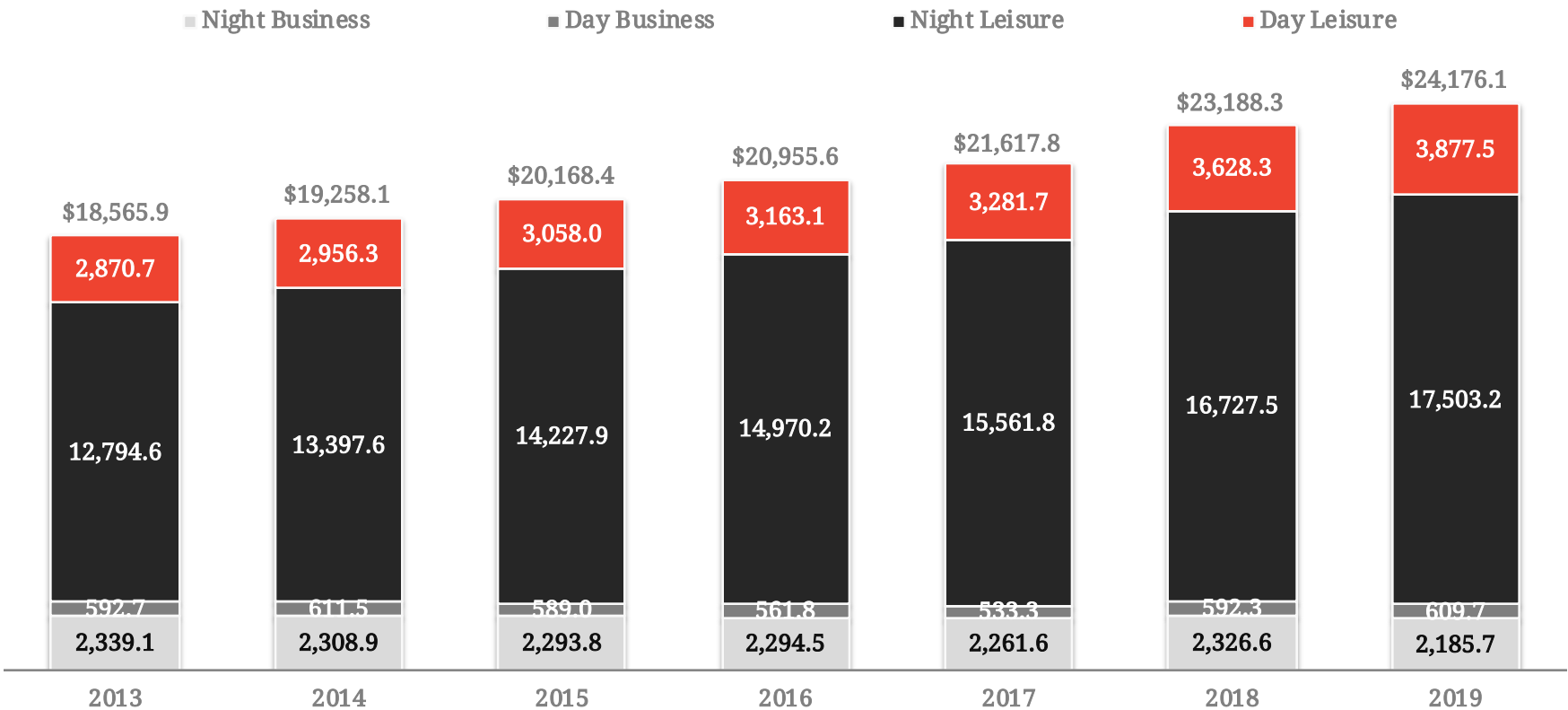


Chart 5 • \$ Millions

New Jersey Direct Spending Volume

DIRECT SPENDING

New Jersey							U.S.
	14/13	15/14	16/15	17/16	18/17	19/18	19/18
Total	3.7%	4.7%	3.9%	3.2%	7.3%	4.3%	5.6%
Business	0.1%	-0.7%	-2.1%	-1.7%	2.1%	-1.3%	6.0%
Leisure	4.4%	5.7%	4.9%	3.9%	8.0%	5.0%	5.5%
Day	3.0%	2.2%	2.1%	2.4%	10.6%	6.3%	9.1%
Night	3.9%	5.3%	4.3%	3.3%	6.5%	3.8%	5.0%
Day Business	3.2%	-3.7%	-4.6%	-5.1%	11.1%	2.9%	11.7%
Day Leisure	3.0%	3.4%	3.4%	3.8%	10.6%	6.9%	8.4%
Night Business	-0.7%	0.0%	-1.4%	-0.9%	0.0%	-2.4%	5.1%
Night Leisure	4.7%	6.2%	5.2%	4.0%	7.5%	4.6%	5.0%

Chart 6 • % change

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

MARKET SHARE

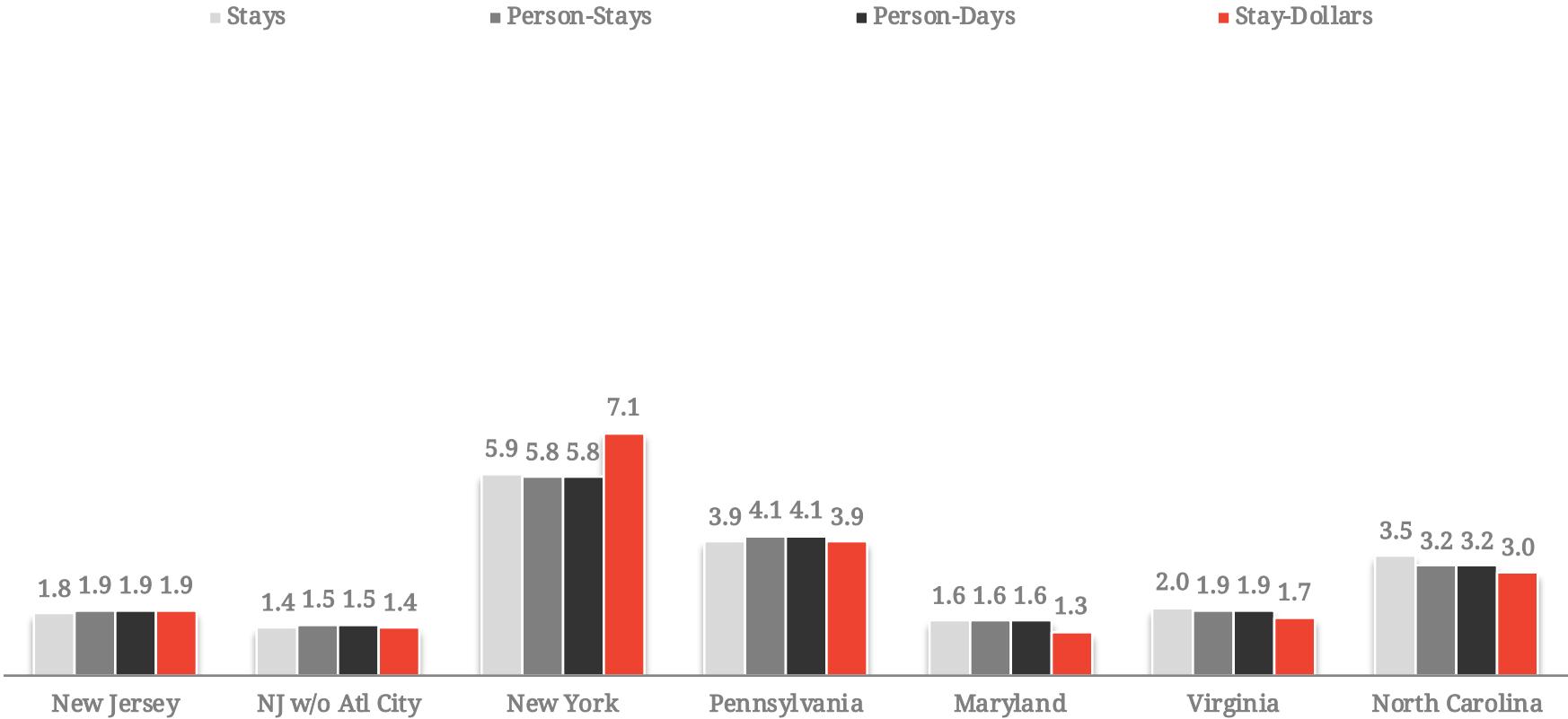


Chart 7 • Segment: 2019 Day Leisure (%) • New Jersey n = 771 household count

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

DEMOGRAPHICS

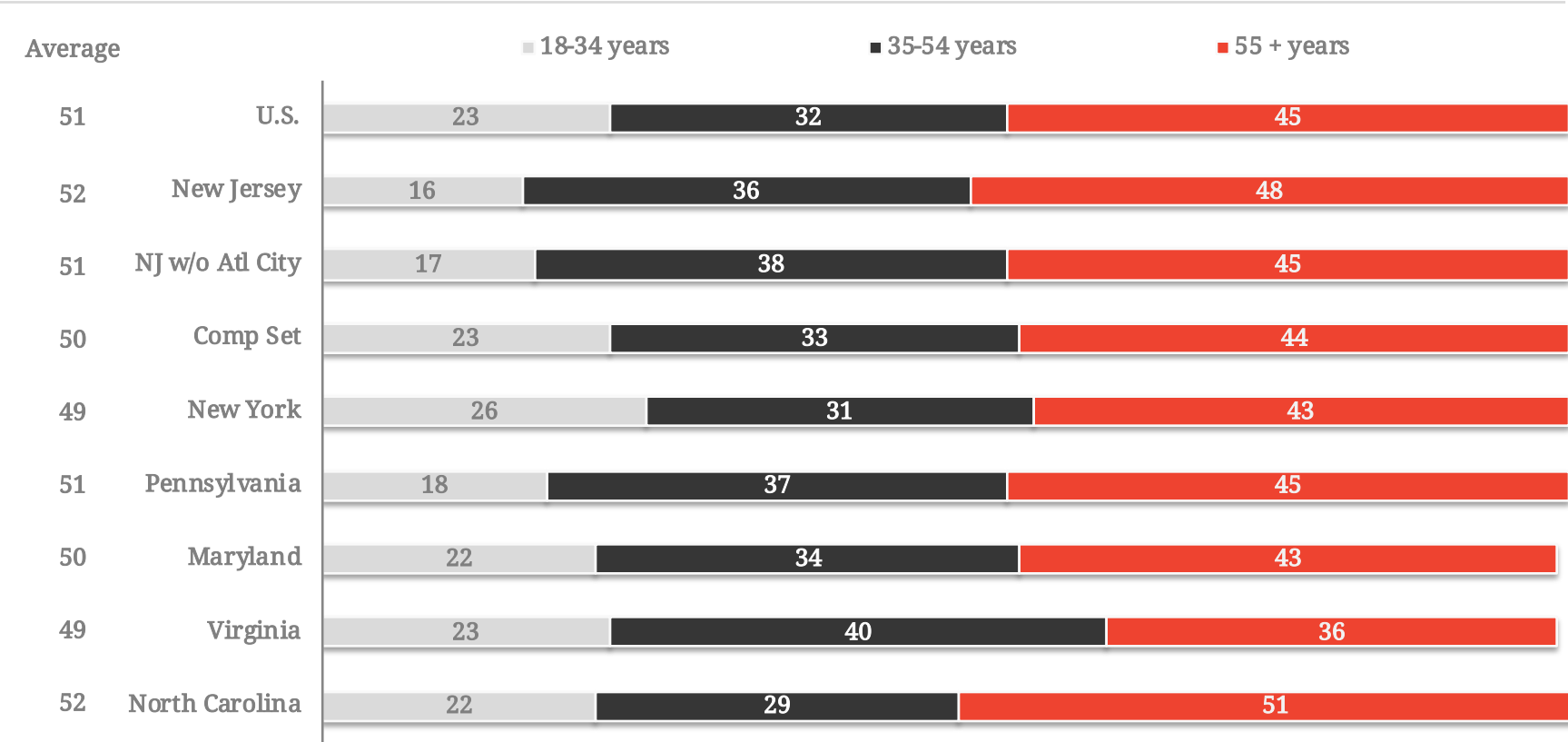


Chart 8 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 771 household count

New Jersey Avg. Party per Stay Spending by Age

DEMOGRAPHICS

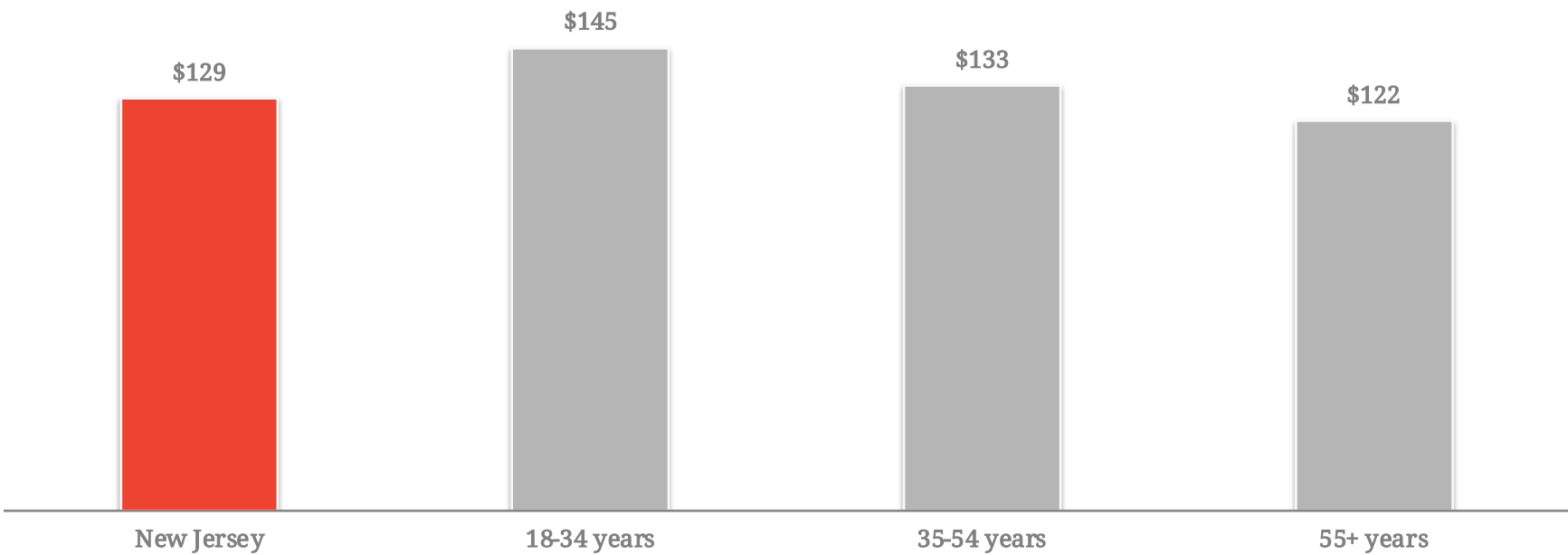


Chart 9 • Segment: 2017-2019 Day Leisure Stays (\$) • New Jersey n = 2,419 household count

New Jersey Age Comparison

DEMOGRAPHICS

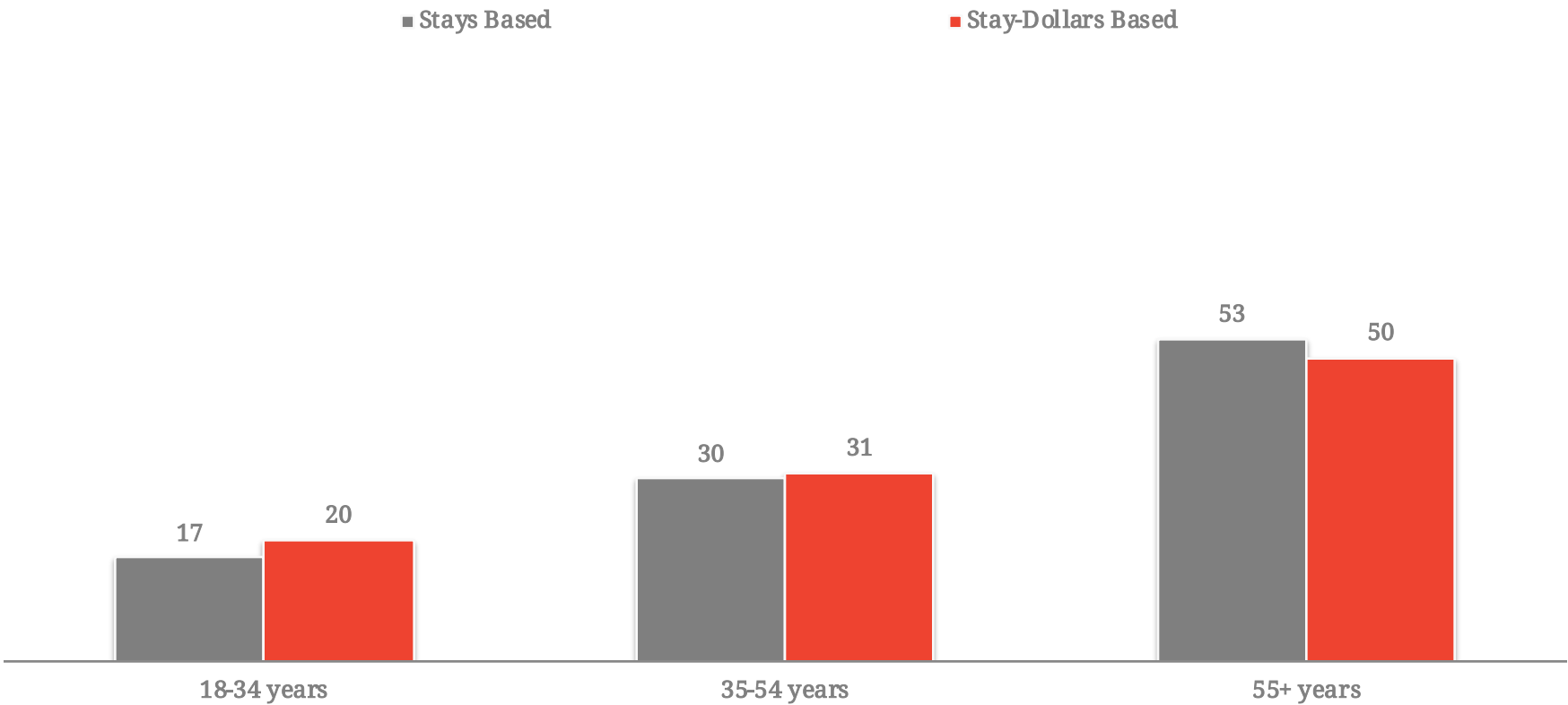


Chart 10 • Segment: 2017-2019 Day Leisure (%) • New Jersey n = 2,419 household count

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

DEMOGRAPHICS

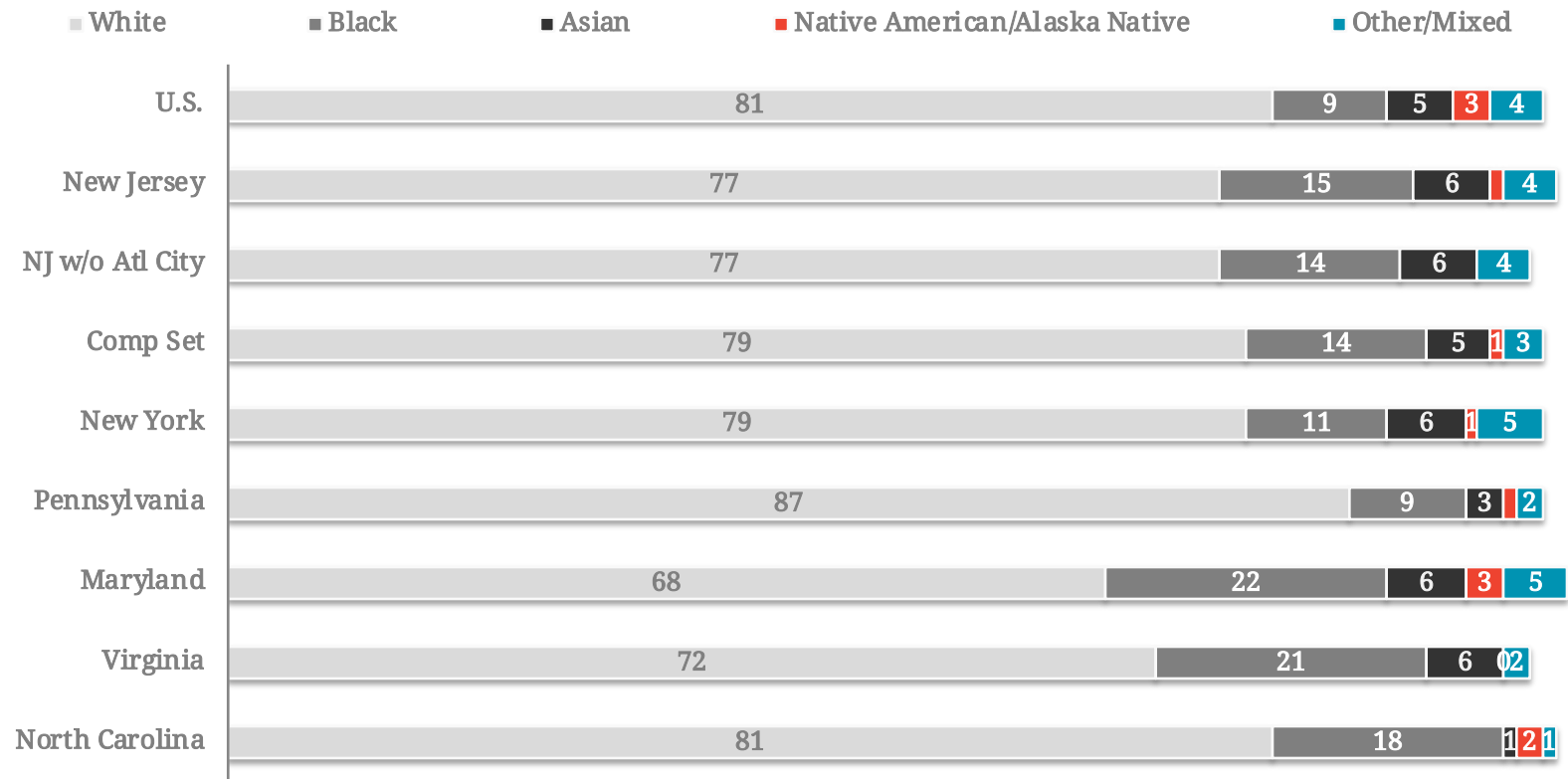


Chart 11 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 771 household count
 ^Note: The total may add to more than 100% due to multiple responses

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

DEMOGRAPHICS

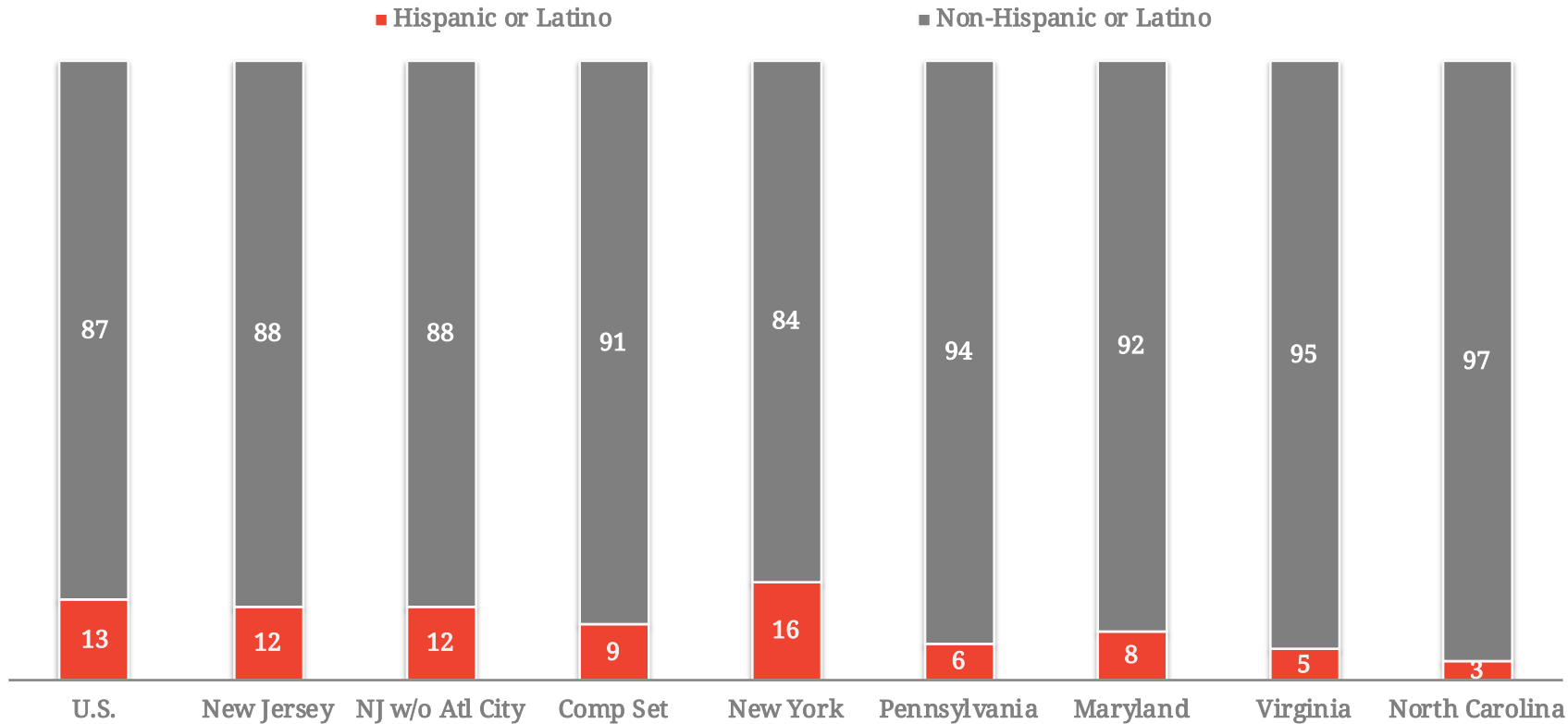


Chart 12 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 771 household count

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

DEMOGRAPHICS

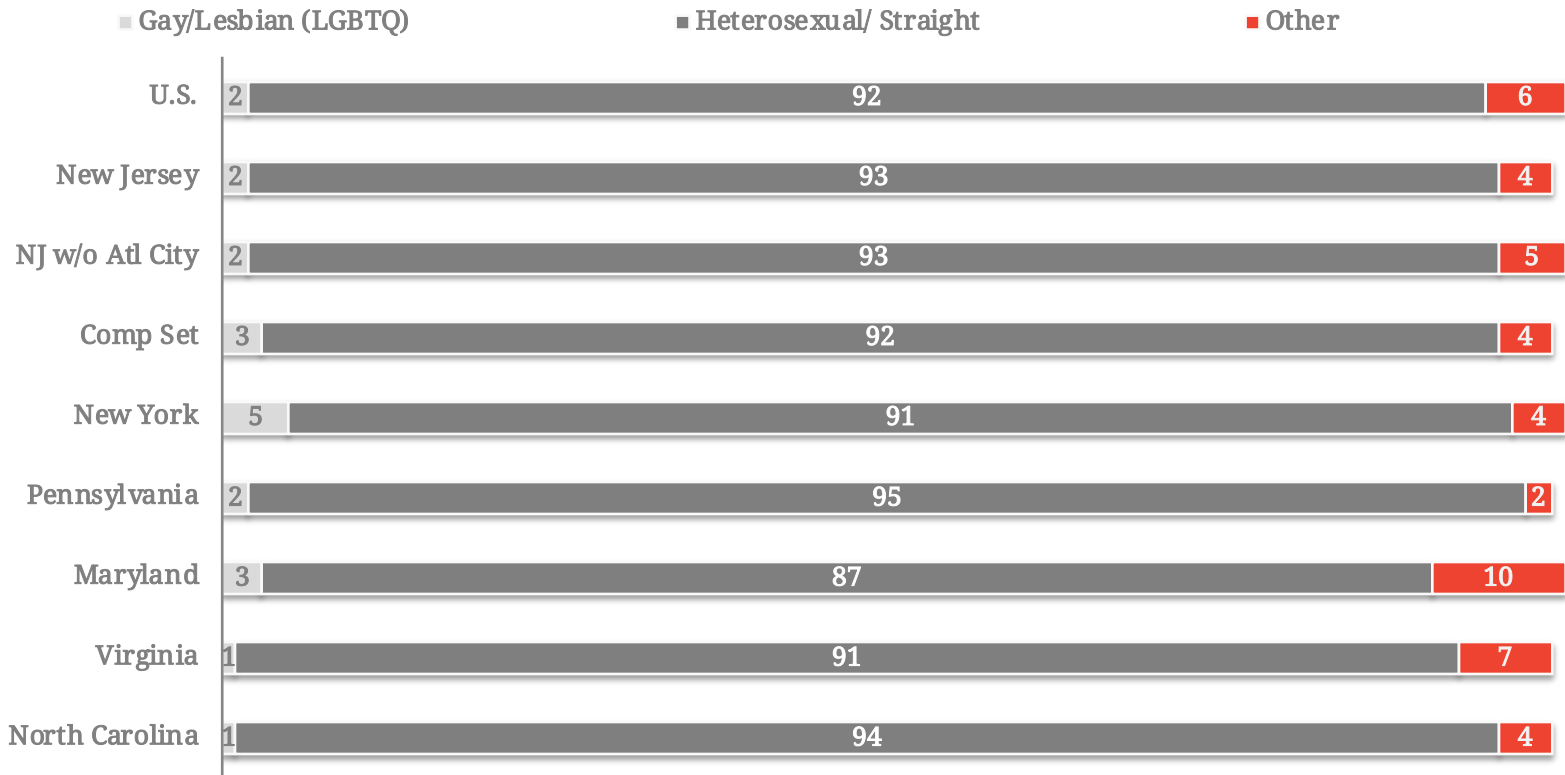


Chart 13 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 771 household count

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

DEMOGRAPHICS

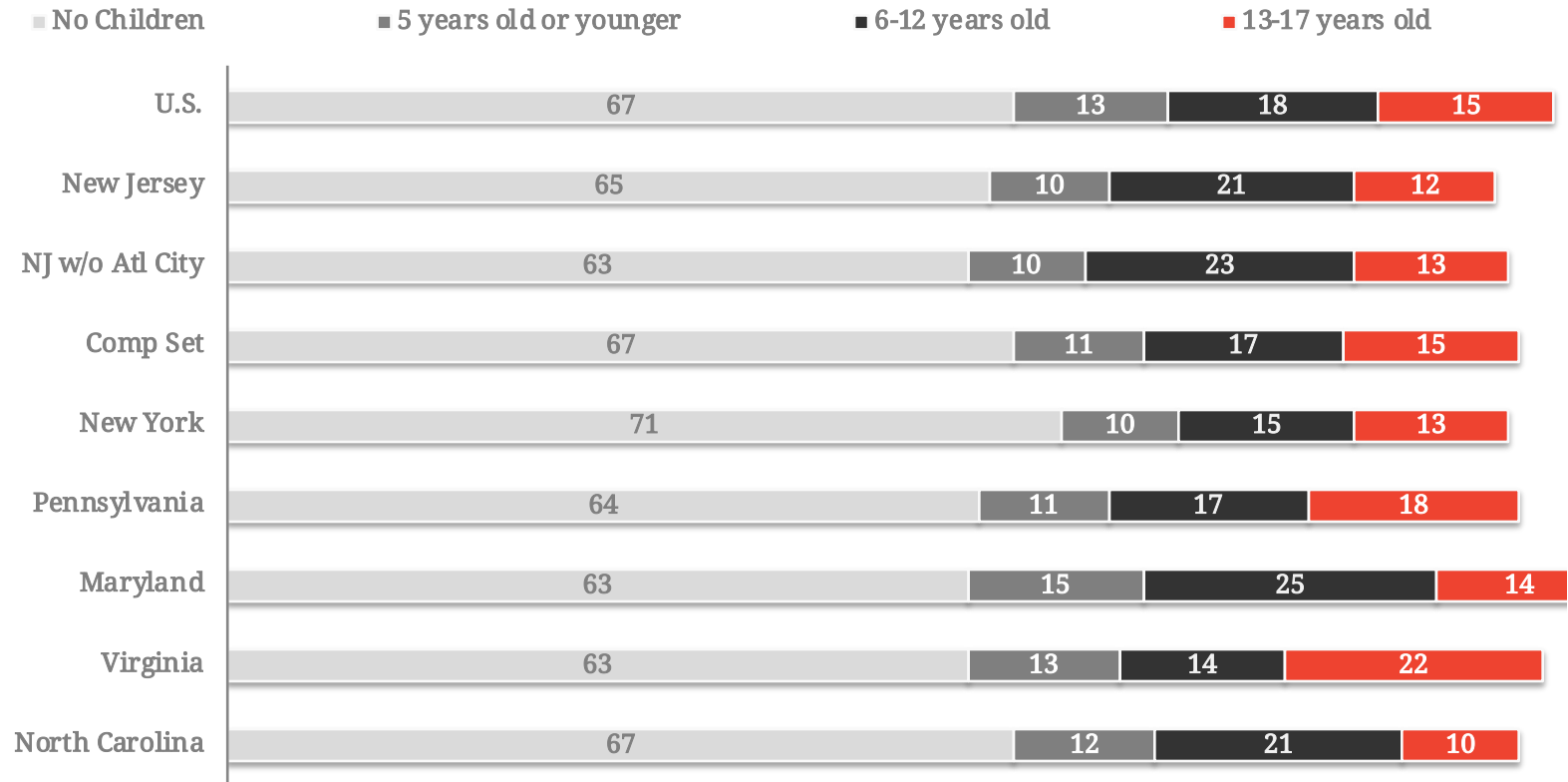


Chart 14 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 771 household count
^Note: The total may add to more than 100% due to multiple responses

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

DEMOGRAPHICS

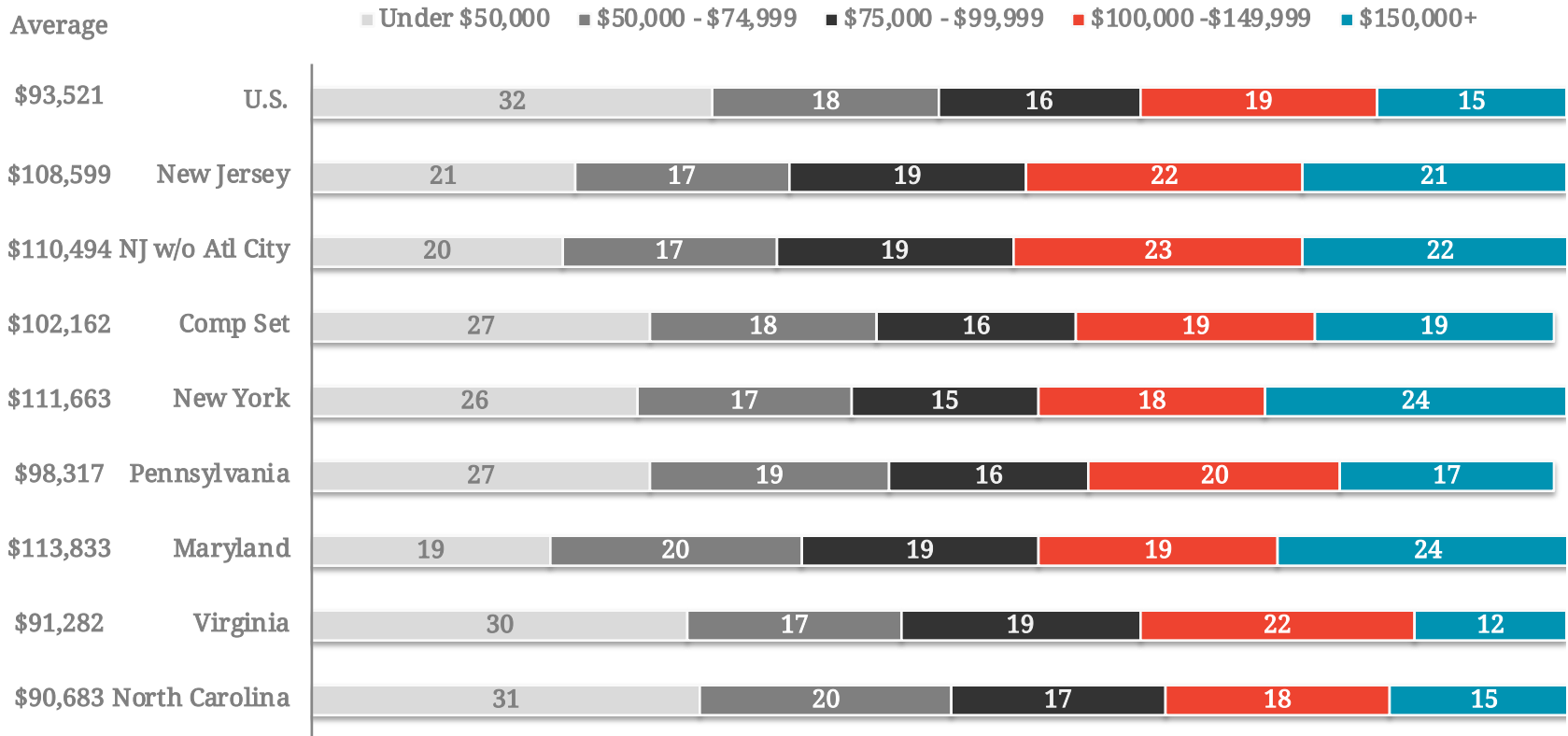


Chart 15 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 771 household count

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

DEMOGRAPHICS

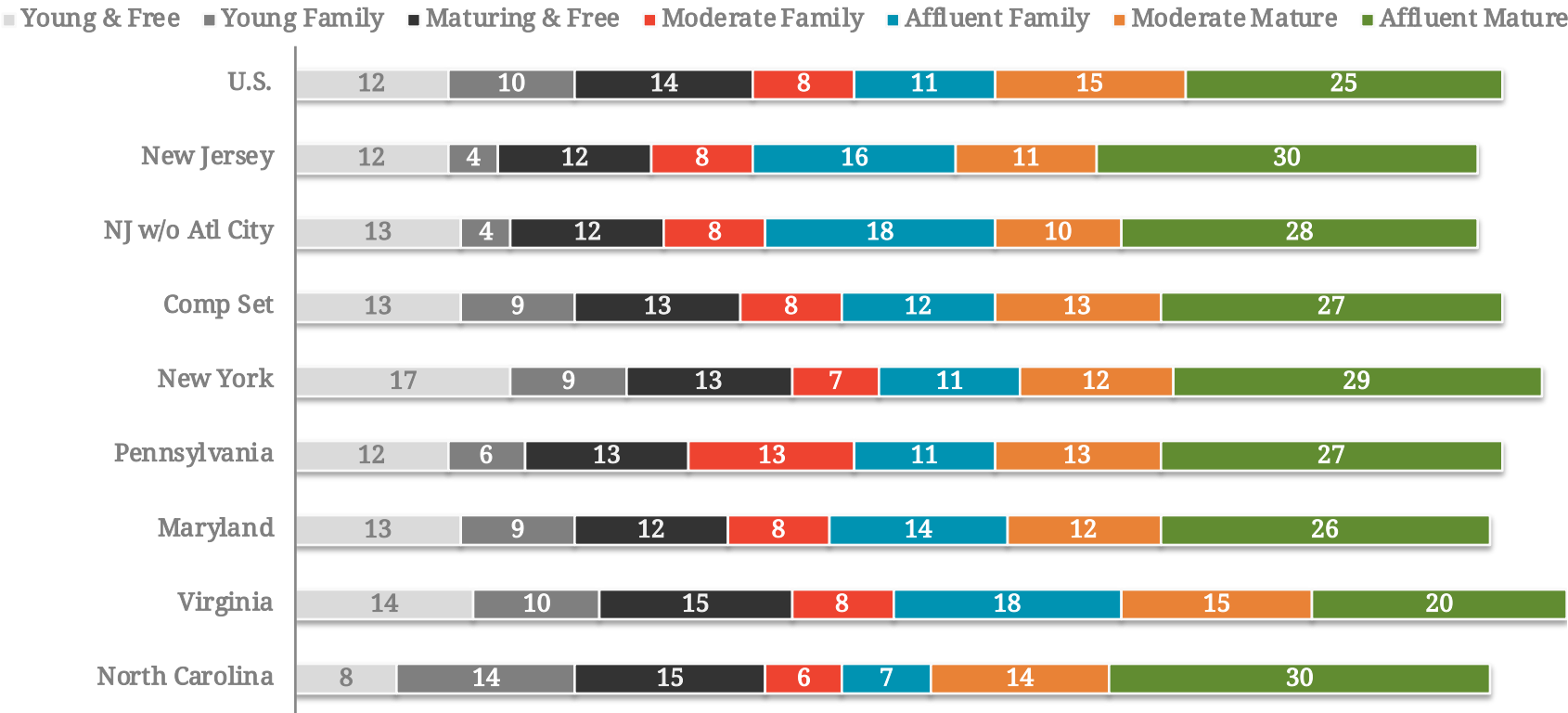


Chart 16 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 771 household count
 ^Note: The total may add to less than 100% due to non-responses

New Jersey Avg. Party per Stay Spending by Lifestage

DEMOGRAPHICS

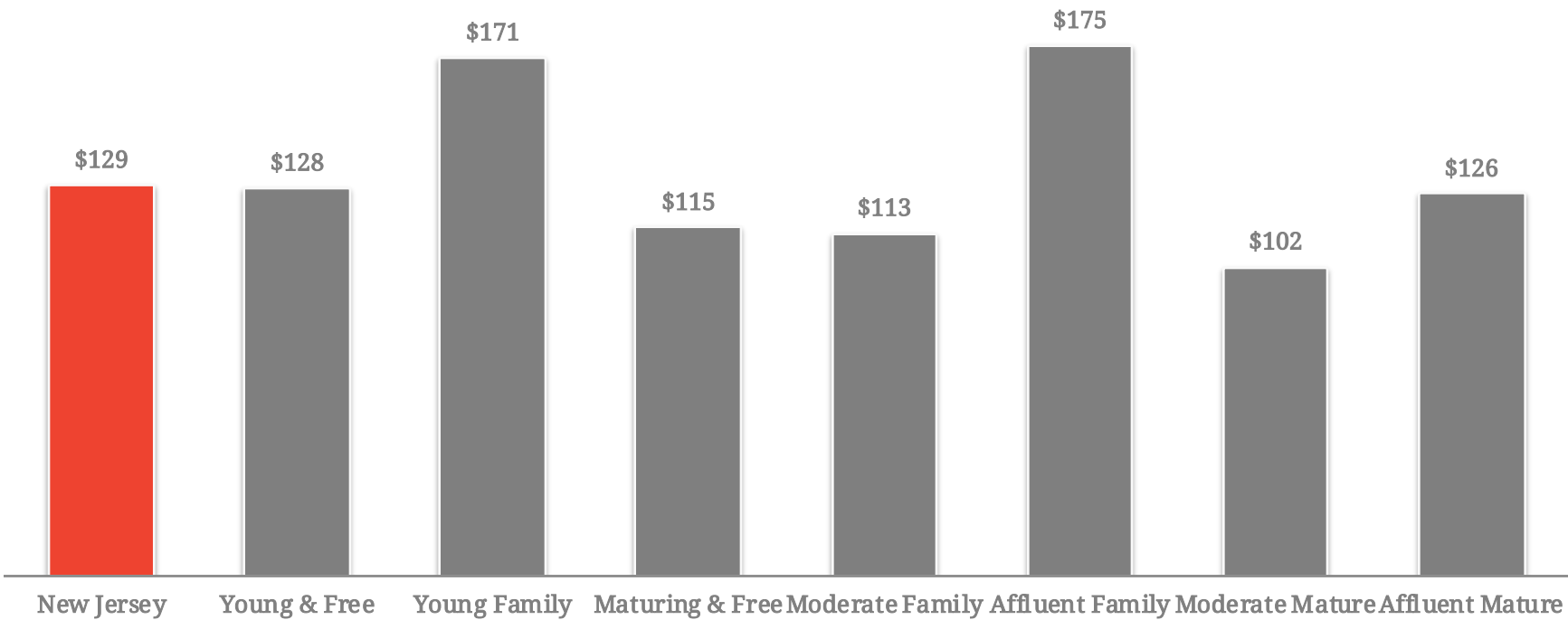


Chart 17 • Segment: 2017-2019 Day Leisure Stays (\$) • New Jersey n = 2,419 household count

New Jersey Lifestage Comparison

DEMOGRAPHICS

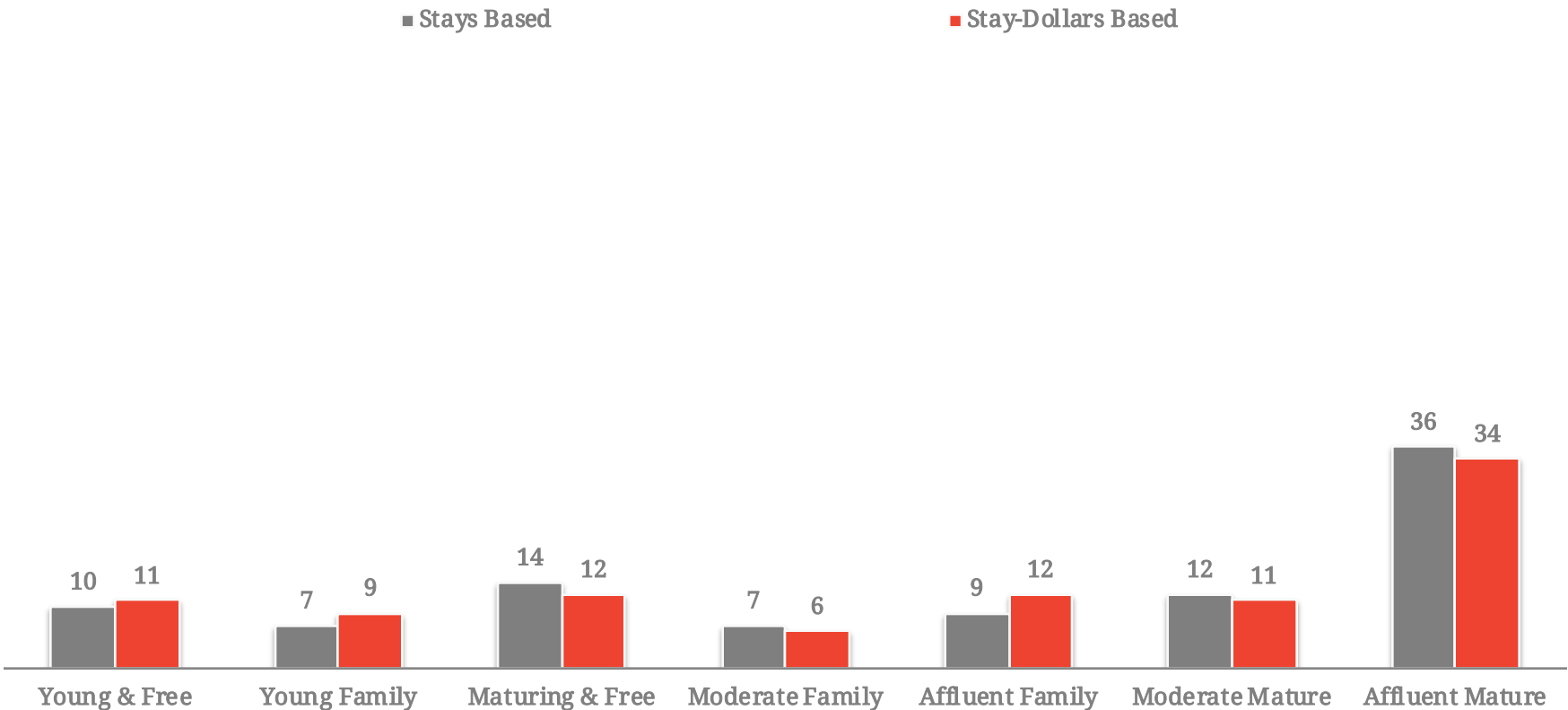


Chart 18 • Segment: 2017-2019 Day Leisure (%) • New Jersey n = 2,419 household count

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

DEMOGRAPHICS

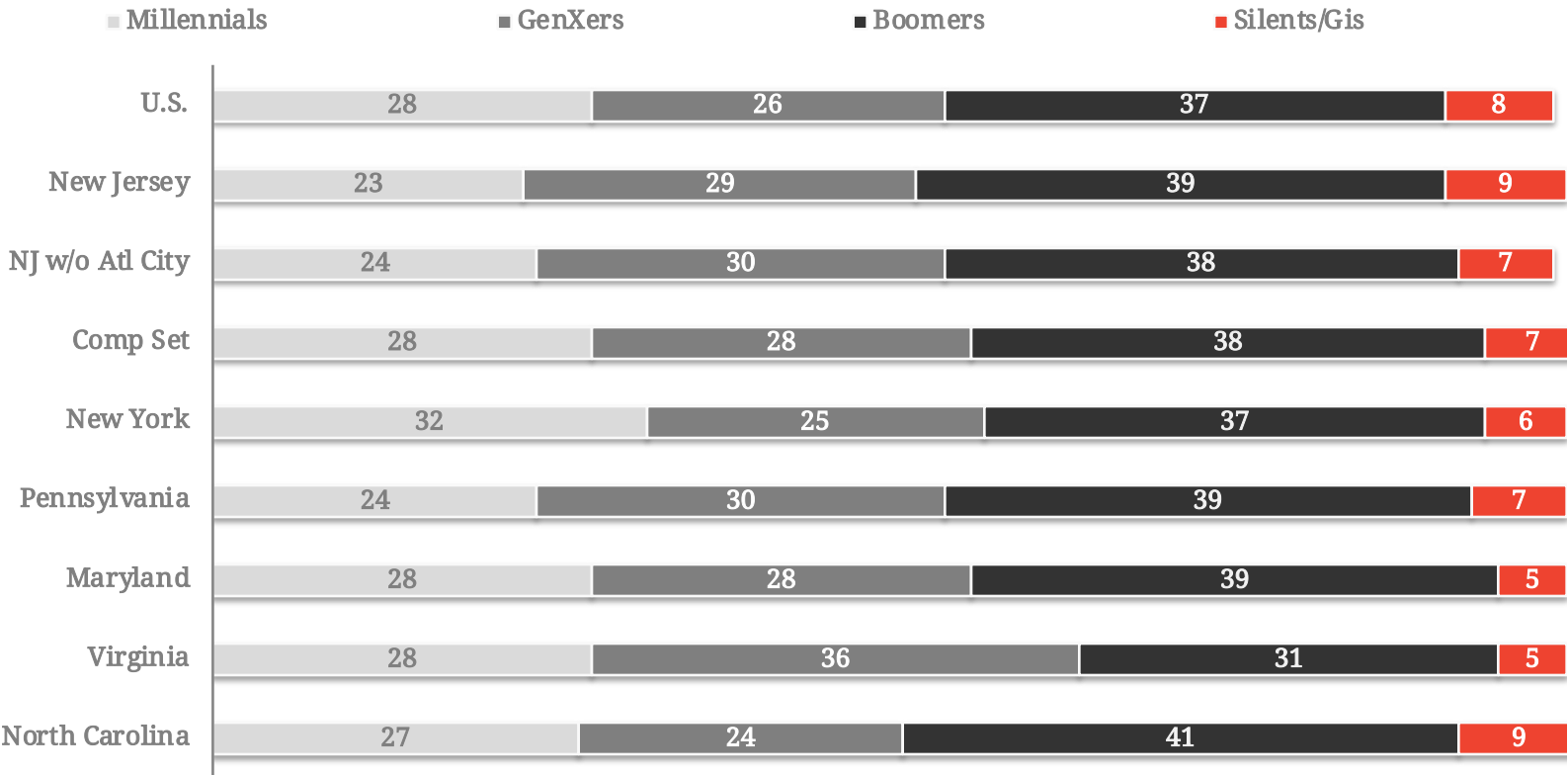


Chart 19 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 771 household count

New Jersey Avg. Party per Stay Spending by Generation

DEMOGRAPHICS

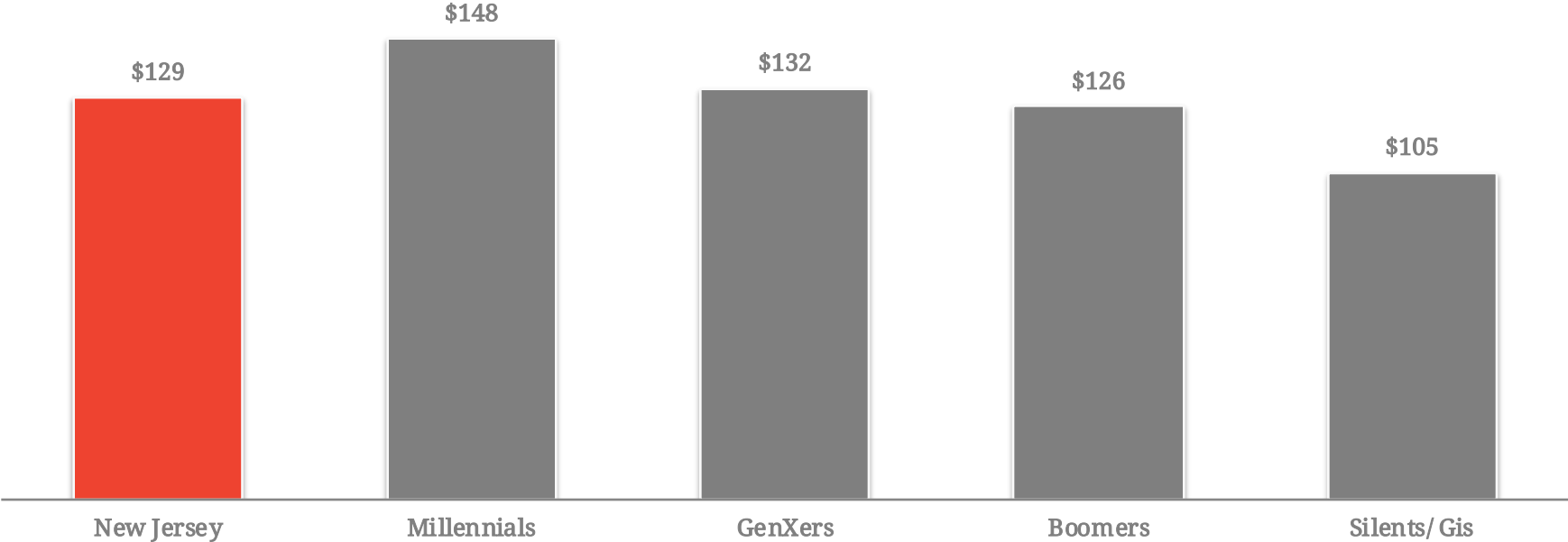


Chart 20 • Segment: 2017-2019 Day Leisure Stays (\$) • New Jersey n = 2,419 household count

New Jersey Traveler Generation Comparison

DEMOGRAPHICS

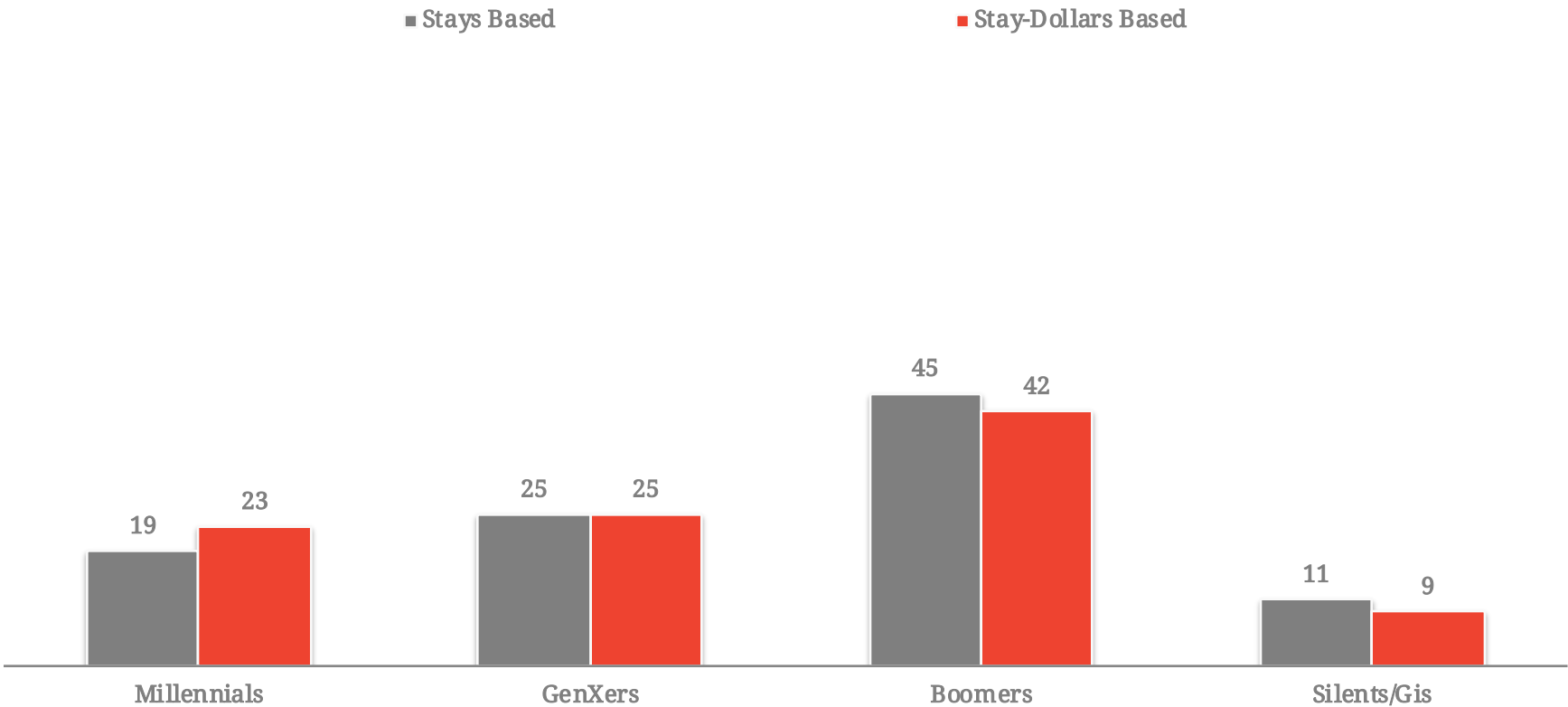
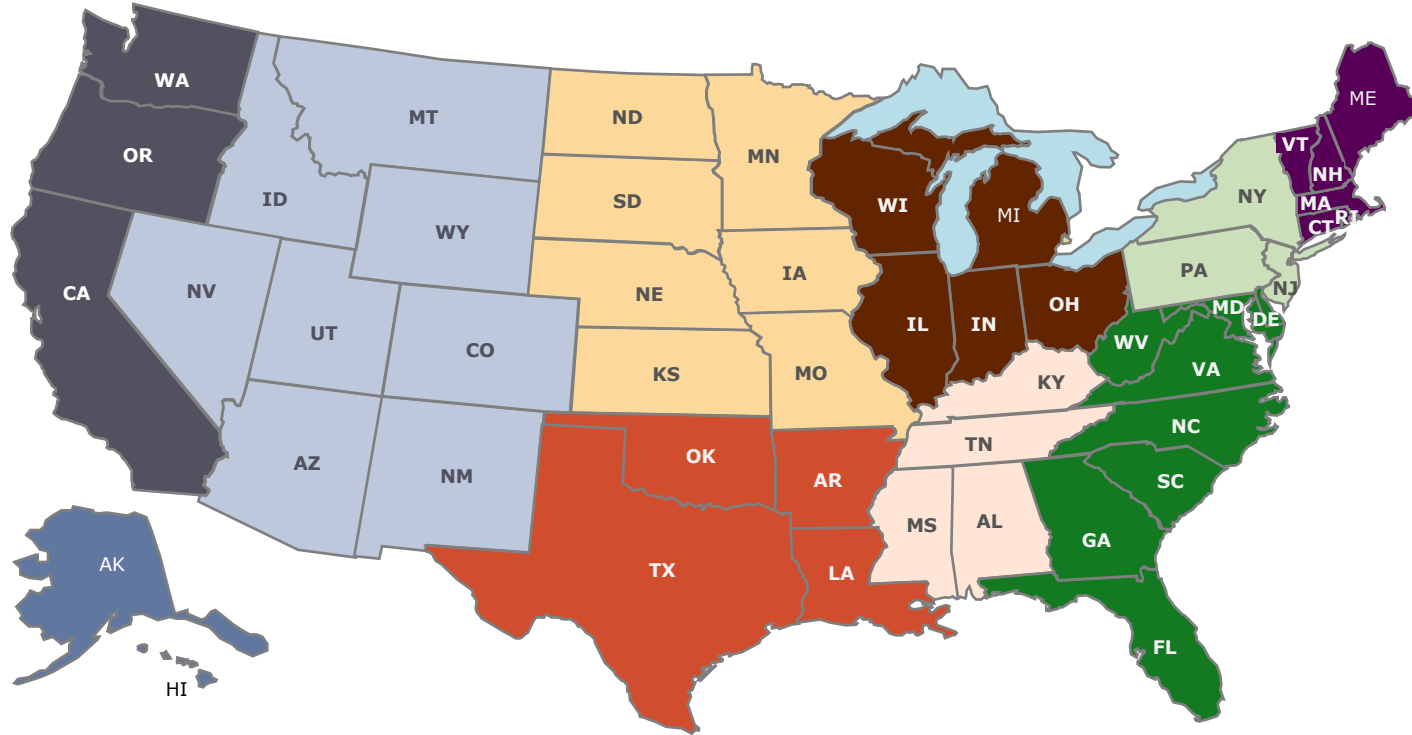


Chart 21 • Segment: 2017-2019 Day Leisure (%) • New Jersey n = 2,419 household count

Origin Divisions for Travel to New Jersey

TRIP ORIGIN



LEGEND

Pacific	0.0%
Mountain	0.1%
West North Central	0.1%
West South Central	0.3%
East North Central	0.0%
East South Central	0.1%
New England	1.9%
Middle Atlantic	90.6%
South Atlantic	7.1%

Chart 22 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 755 household count

Top Origin States to New Jersey

TRIP ORIGIN

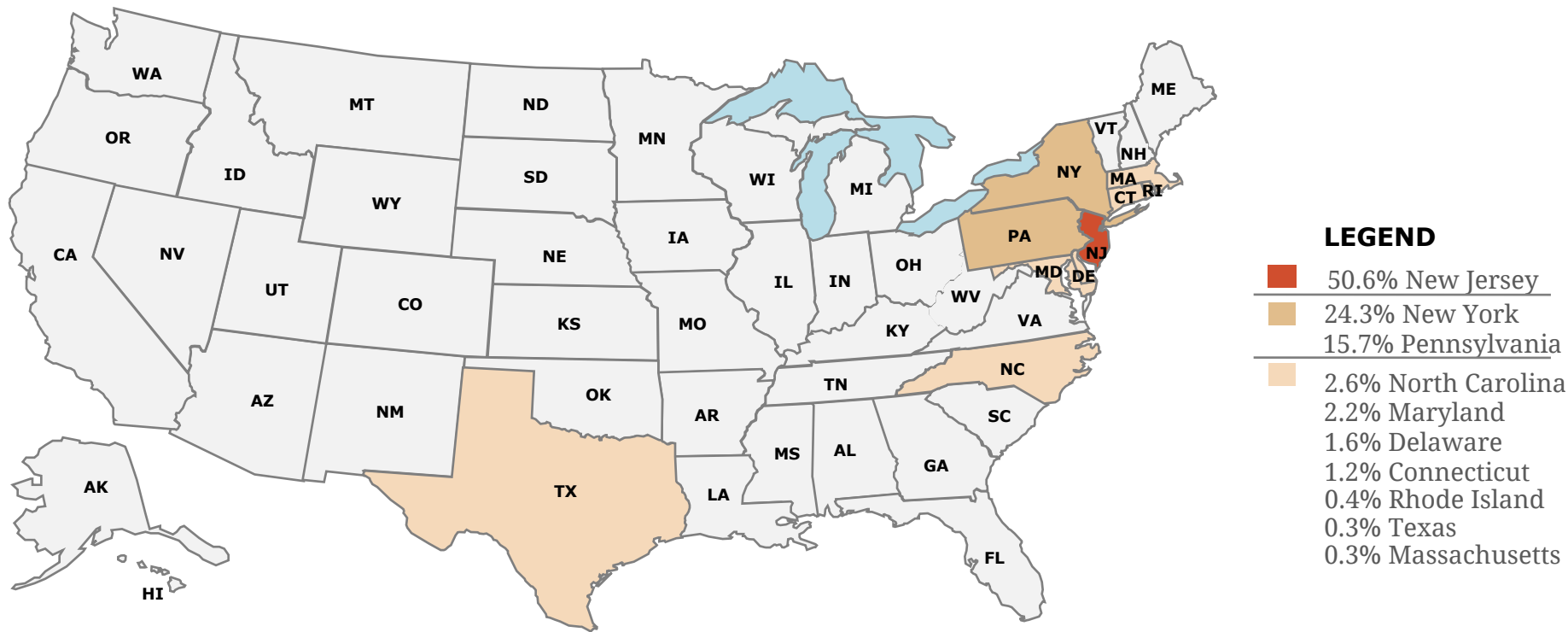


Chart 23 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 755 household count

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	5.6%	59.8%	60.7%	21.6%	47.7%	17.2%	3.5%	0.9%	0.2%
Philadelphia, PA	2.4%	30.6%	28.3%	9.3%	4.3%	27.9%	9.1%	0.9%	0.3%
Greensboro-High Point-Winston Salem, NC	0.5%	1.9%	2.3%	2.8%	0.1%	0.0%	*	5.1%	11.2%
Baltimore, MD	0.8%	1.7%	2.0%	3.4%	0.4%	2.3%	25.8%	1.2%	0.5%
Wilkes Barre-Scranton, PA	0.5%	1.1%	1.0%	2.6%	1.7%	8.0%	0.8%	*	*
Washington, DC (Hagerstown, MD)	1.6%	1.0%	1.1%	7.1%	1.1%	2.9%	34.2%	22.6%	0.9%
Norfolk-Portsmouth-Newport News, VA	0.7%	0.6%	0.8%	3.7%	0.1%	0.1%	0.4%	21.4%	6.0%
Pittsburgh, PA	0.8%	0.6%	0.7%	3.1%	0.1%	12.2%	0.6%	0.3%	0.0%
Providence, RI-New Bedford, MA	0.7%	0.4%	0.5%	0.3%	0.8%	0.0%	0.0%	0.0%	0.0%
Hartford & New Haven, CT	0.9%	0.4%	0.4%	1.3%	3.6%	*	0.5%	0.0%	0.0%
Top 10 Sum	14.5%	98.1%	97.8%	58.9%	59.9%	70.6%	74.9%	52.4%	19.1%

Chart 24 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 753 household count

New Jersey Avg. Party per Stay Spending by Origin DMA

TRIP ORIGIN

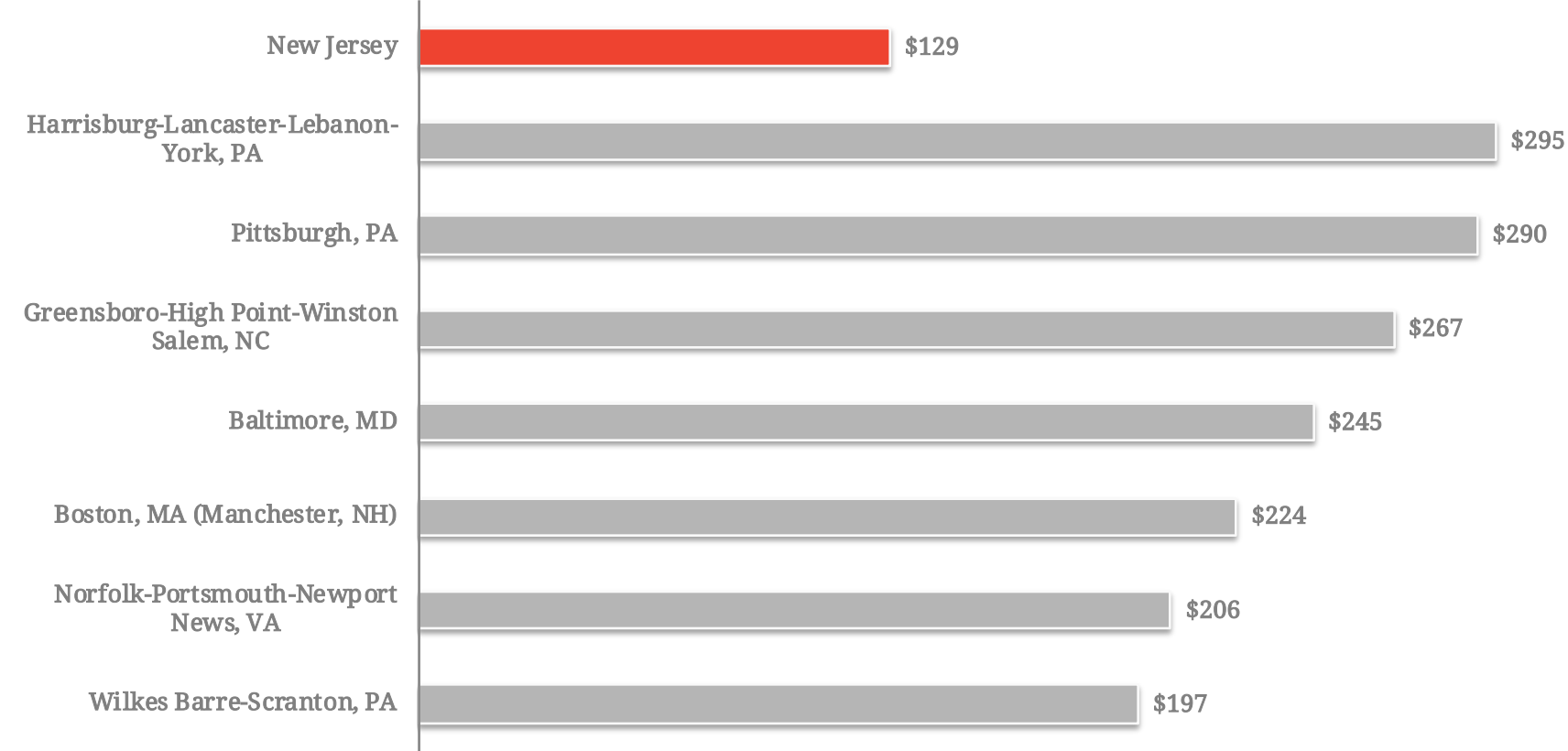


Chart 25 • Segment: 2017-2019 Day Leisure Stays (\$) • New Jersey n = 2,388 household count

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

TRIP ORIGIN

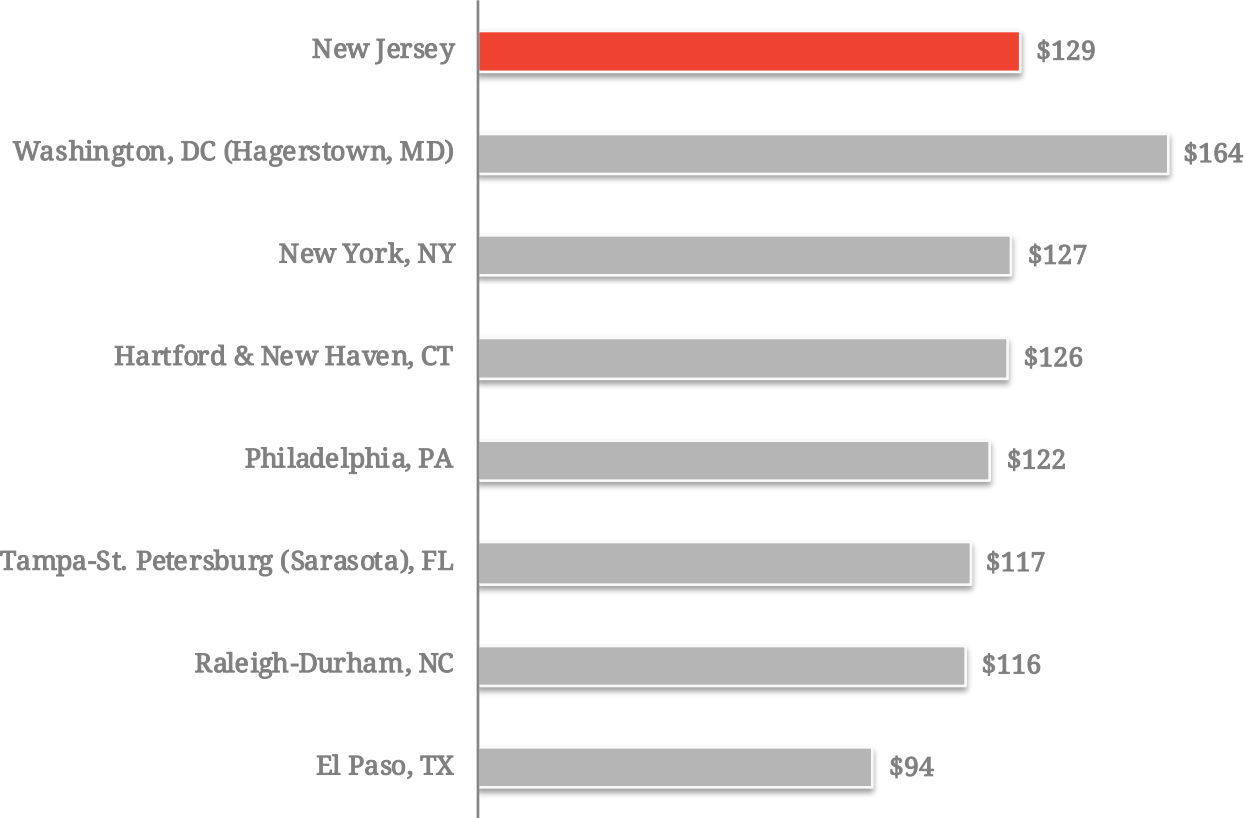


Chart 26 • Segment: 2017-2019 Day Leisure Stays (\$) • New Jersey n = 2,388 household count

New Jersey Origin DMA Comparison

TRIP ORIGIN

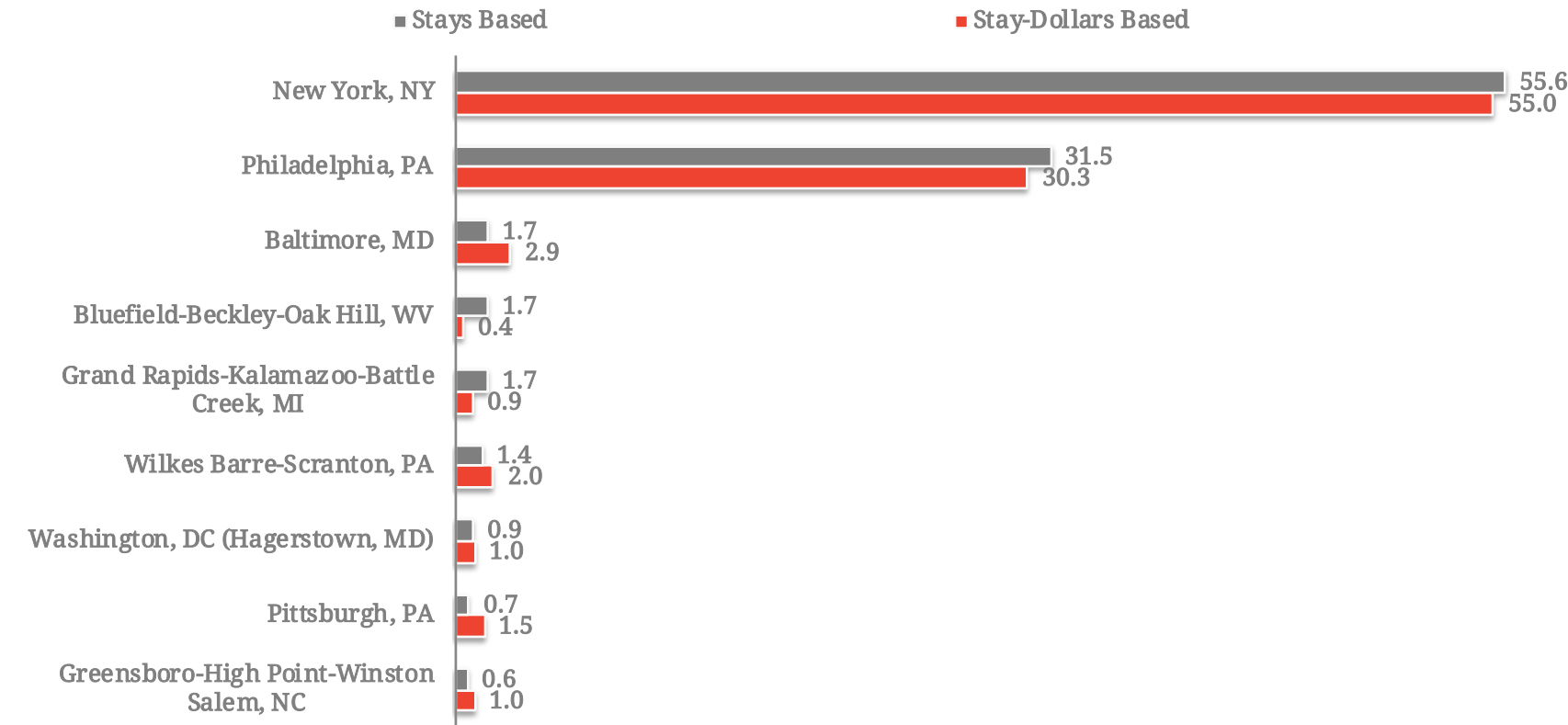


Chart 27 • Segment: 2017-2019 Day Leisure (%) • New Jersey n = 2,388 household count

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

TRANSPORTATION

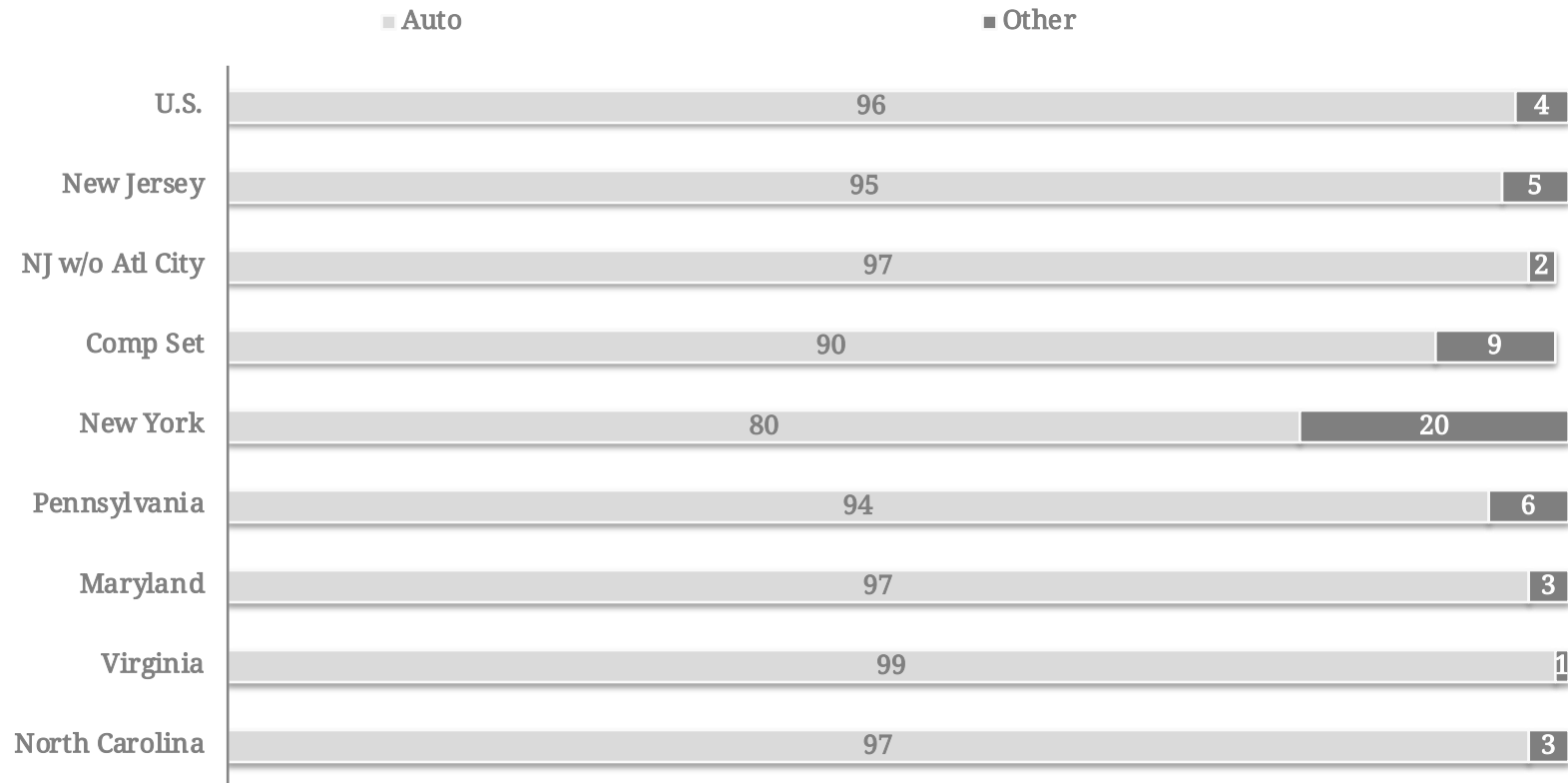


Chart 28 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 771 household count

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

TRANSPORTATION

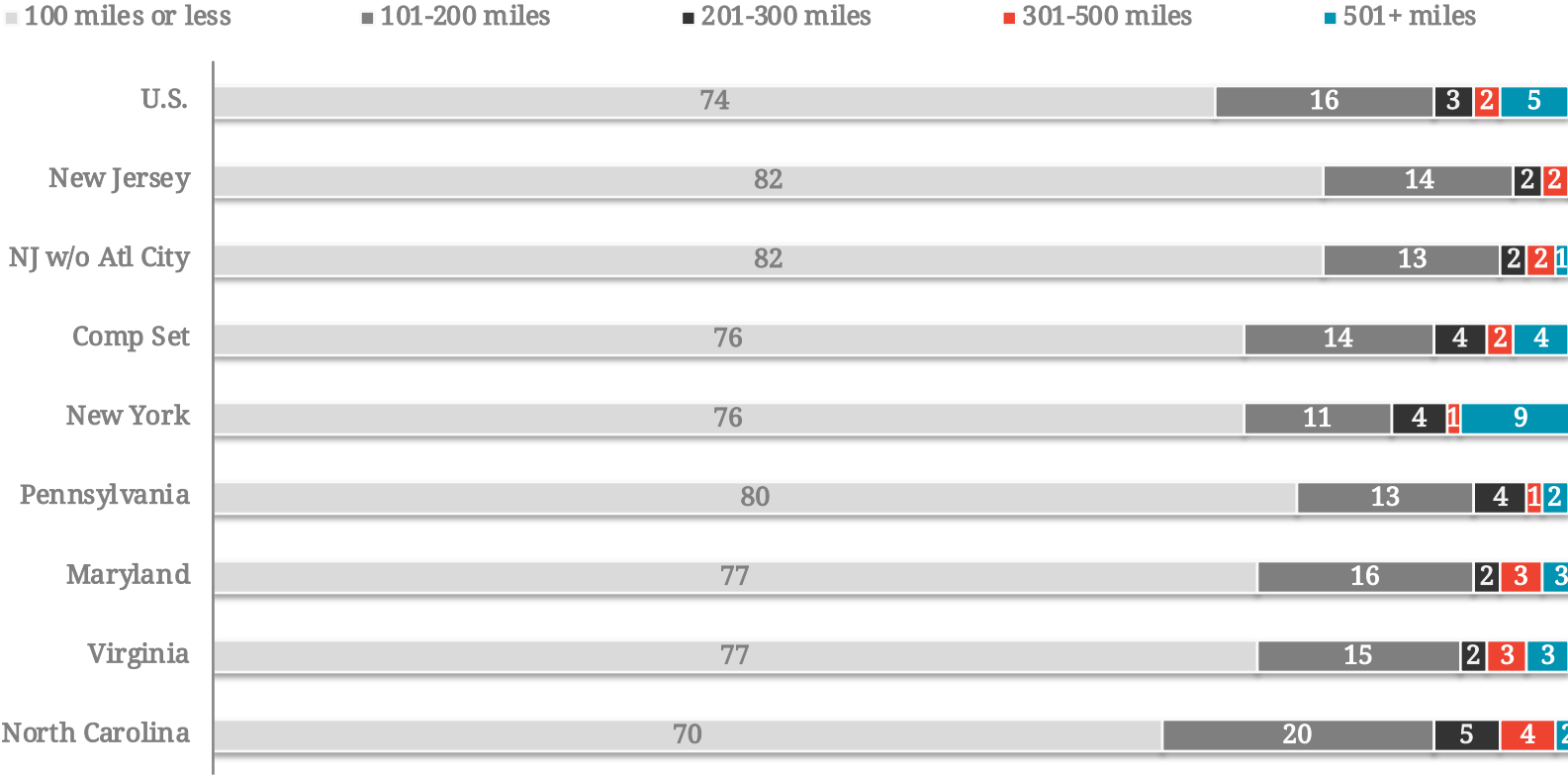


Chart 29 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 670 household count

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

TRANSPORTATION

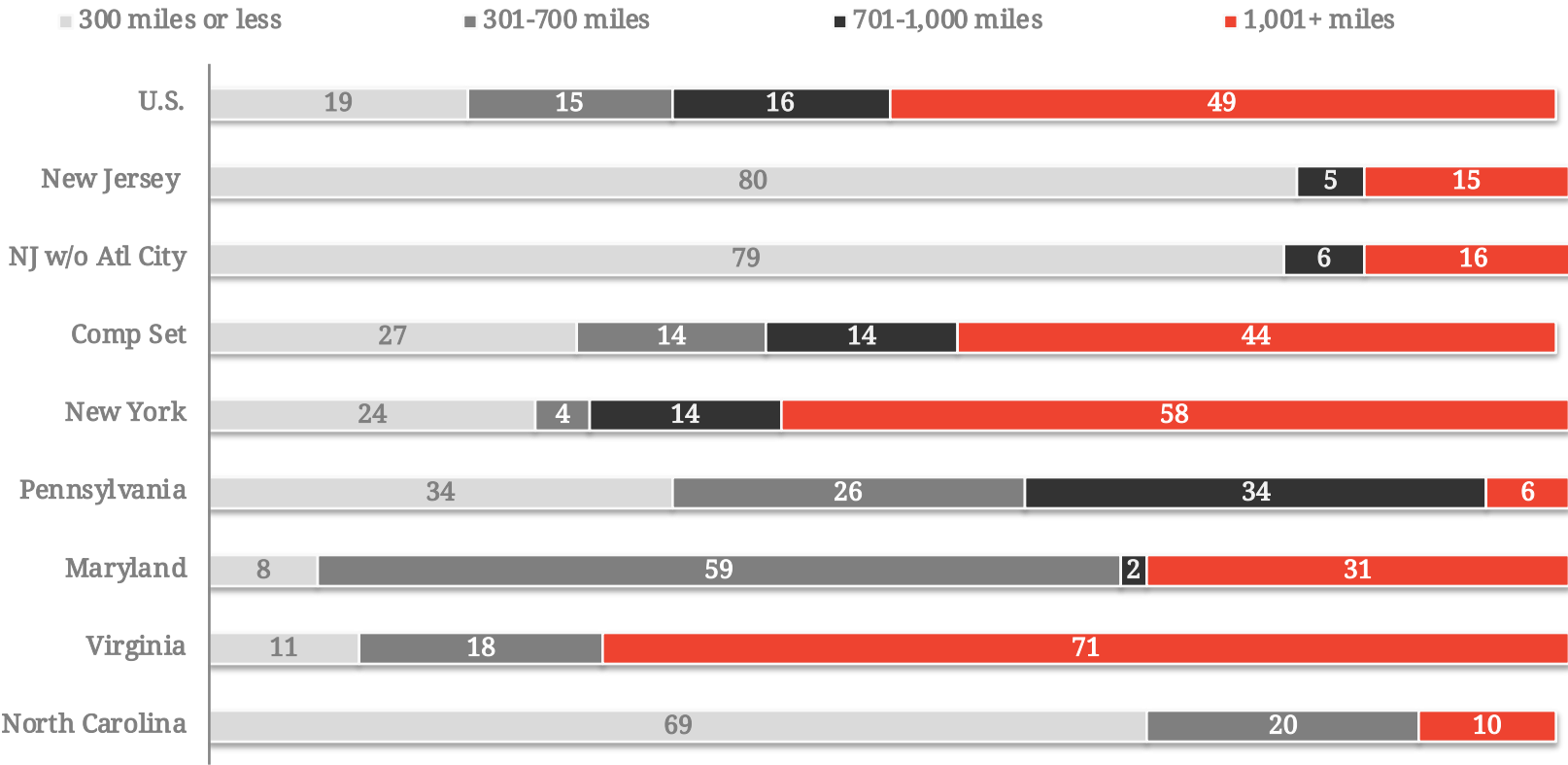


Chart 30 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 19 household count

New Jersey Month Trip Started

TRIP TIMING

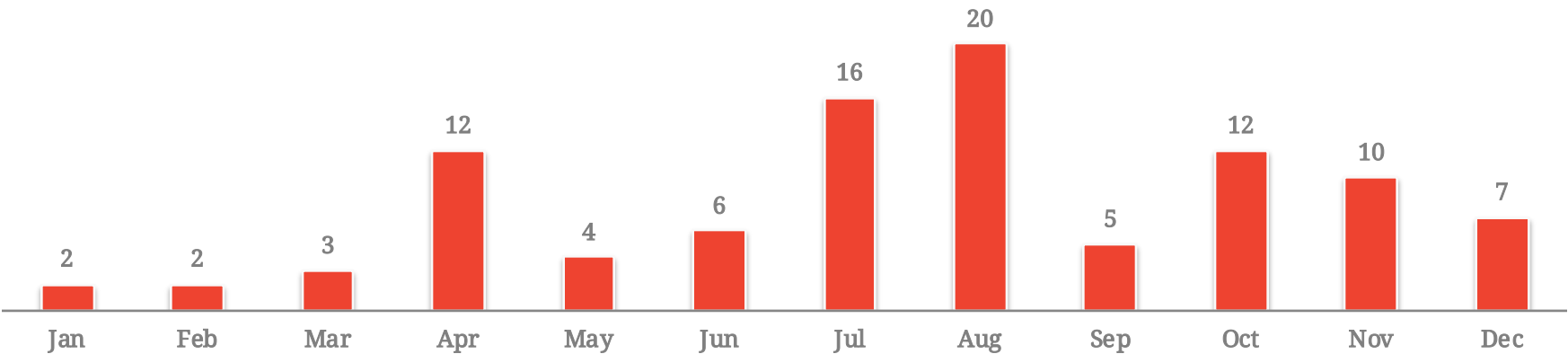


Chart 31 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 771 household count

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

TRIP TIMING

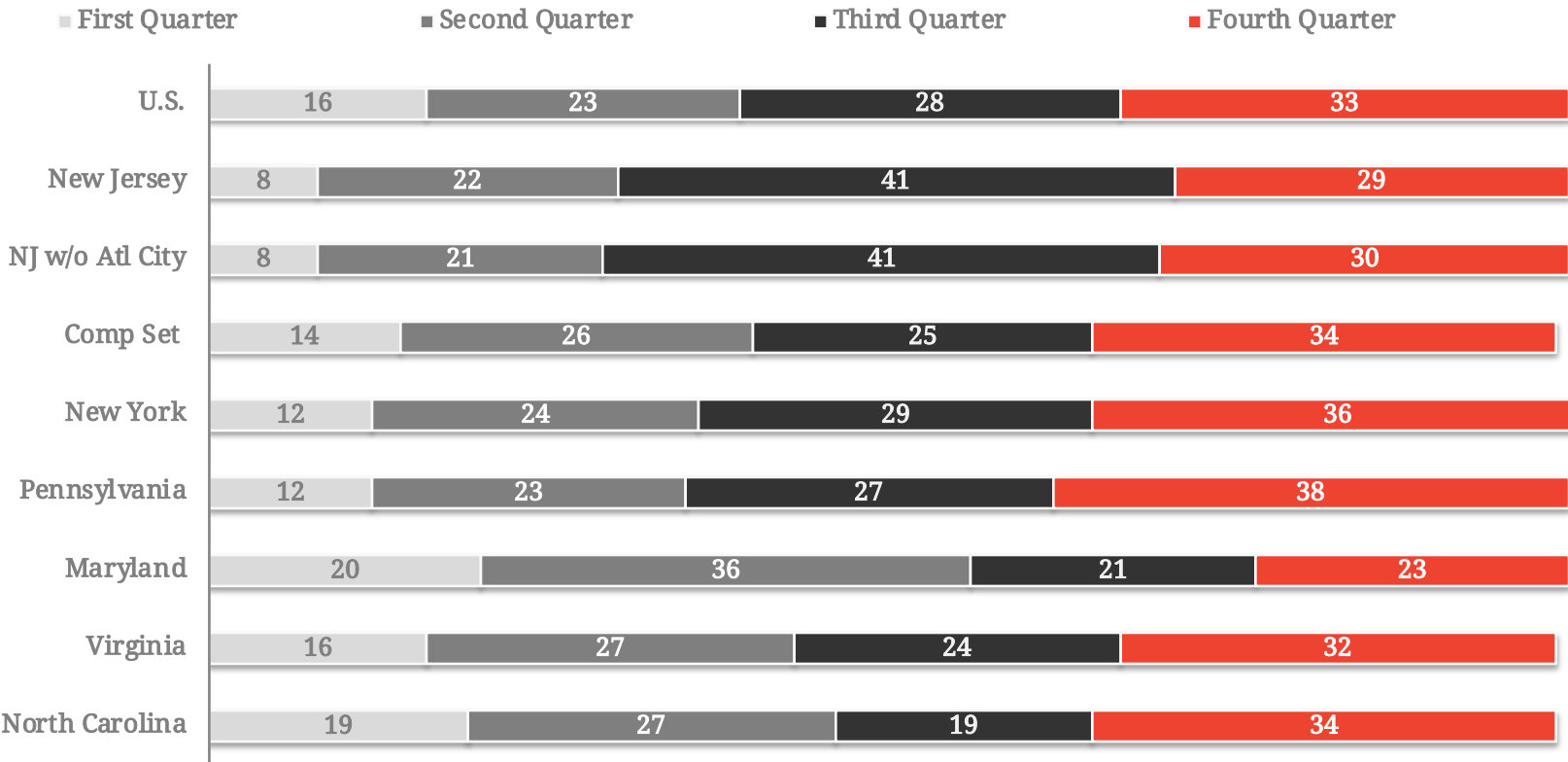


Chart 32 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 771 household count

New Jersey Avg. Party per Stay Spending by Quarter

TRIP TIMING

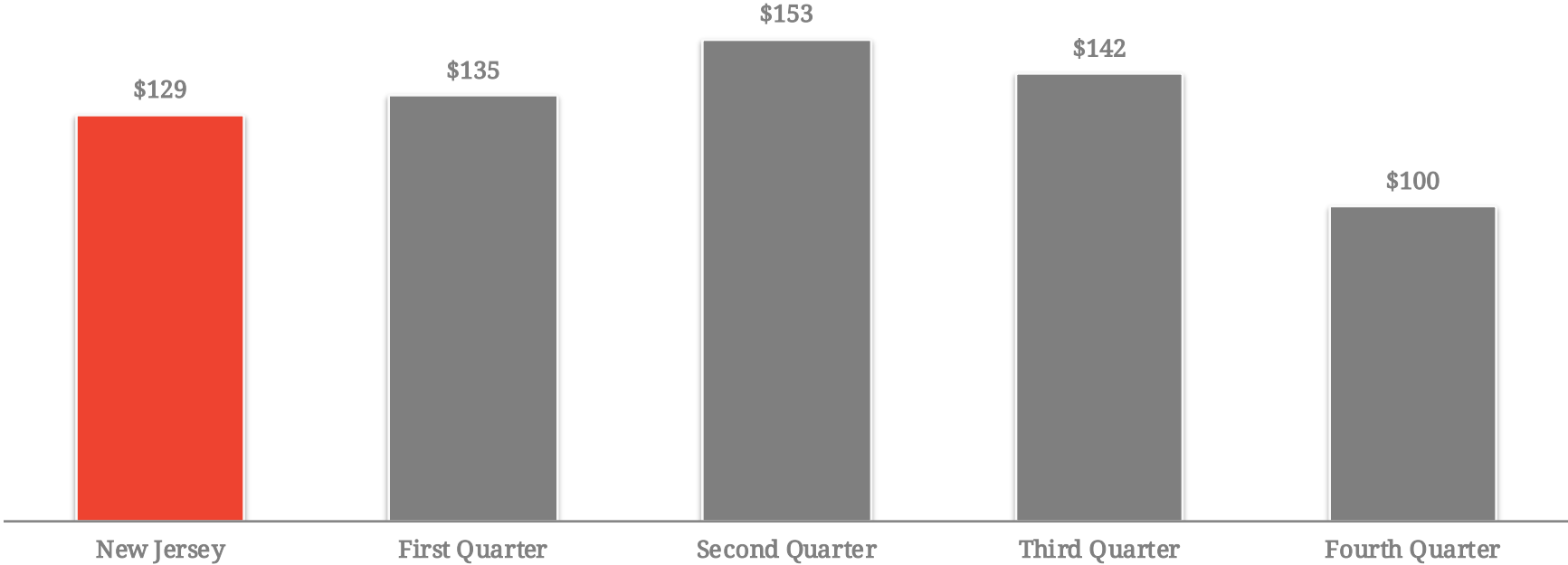


Chart 33 • Segment: 2017-2019 Day Leisure Stays (\$) • New Jersey n = 2,419 household count

New Jersey Trip Timing Comparison by Quarter

TRIP TIMING

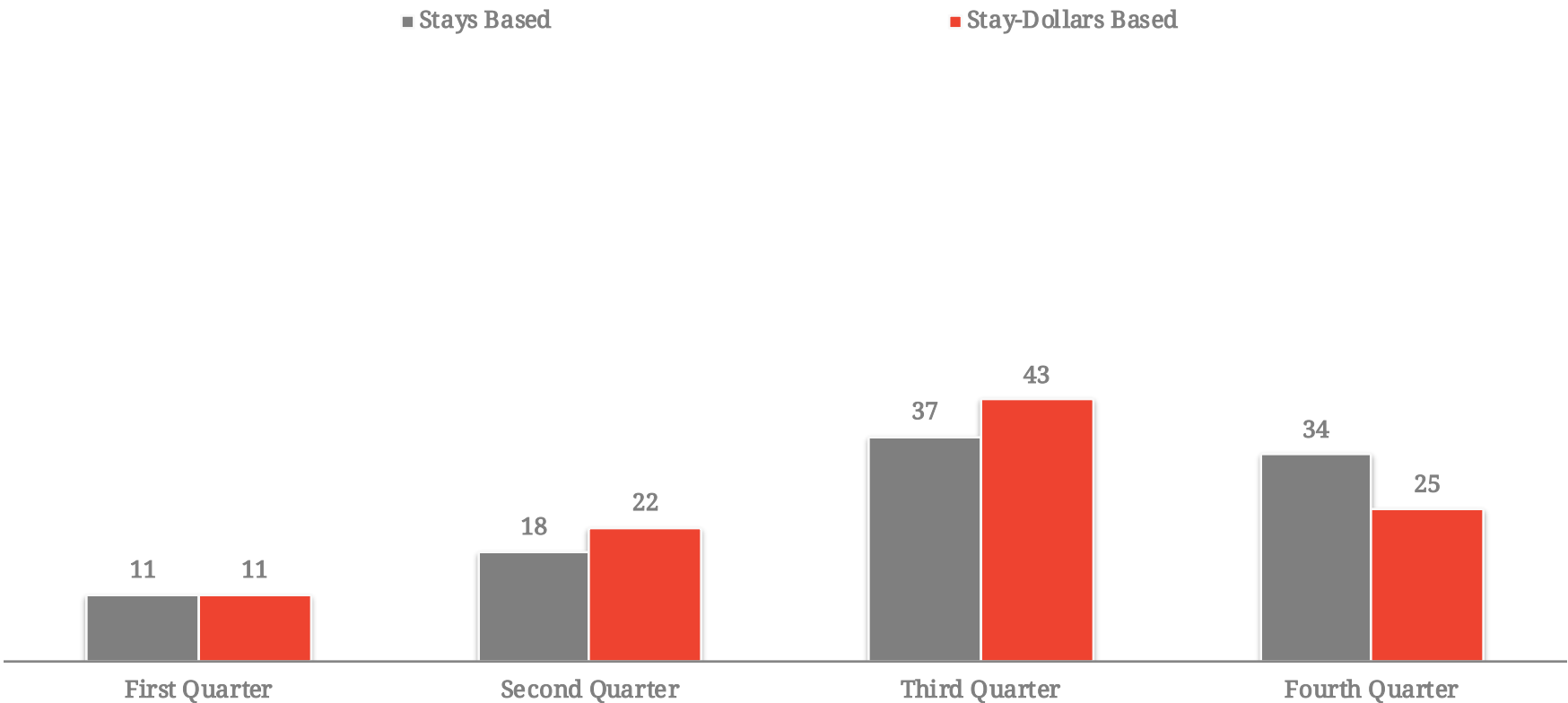


Chart 34 • Segment: 2017-2019 Day Leisure (%) • New Jersey n = 2,419 household count

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

TRIP TIMING

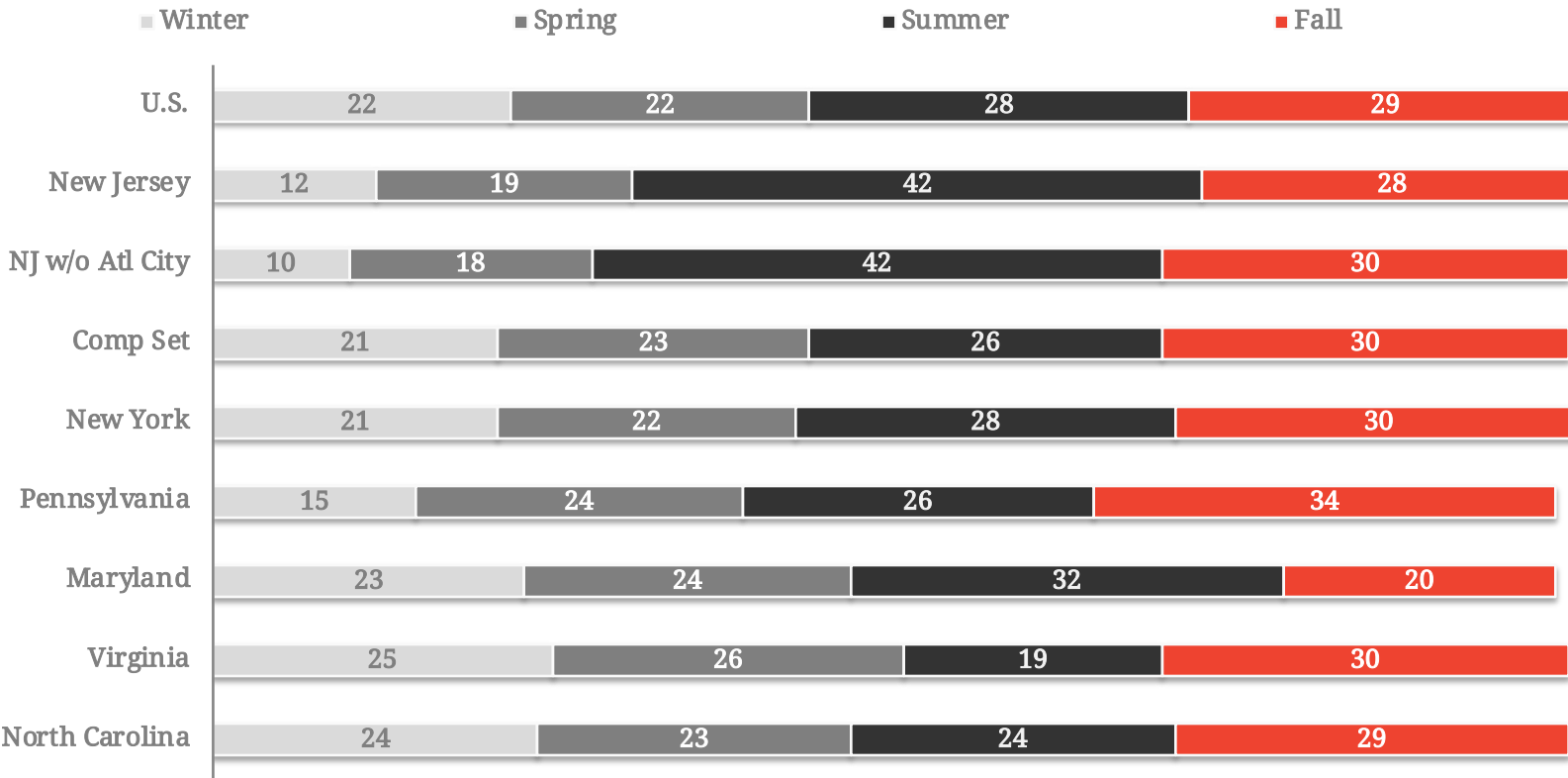


Chart 35 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 771 household count

New Jersey Avg. Party per Stay Spending by Season

TRIP TIMING

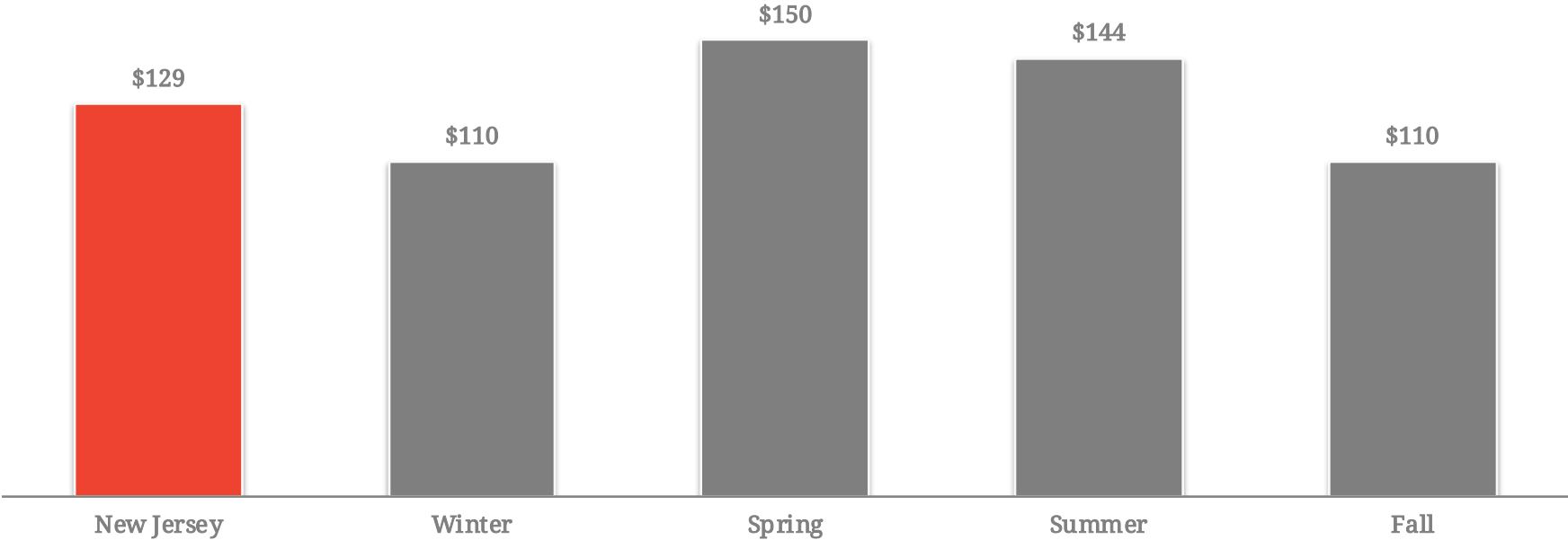


Chart 36 • Segment: 2017-2019 Day Leisure Stays (\$) • New Jersey n = 2,419 household count

New Jersey Trip Timing Comparison by Season

TRIP TIMING

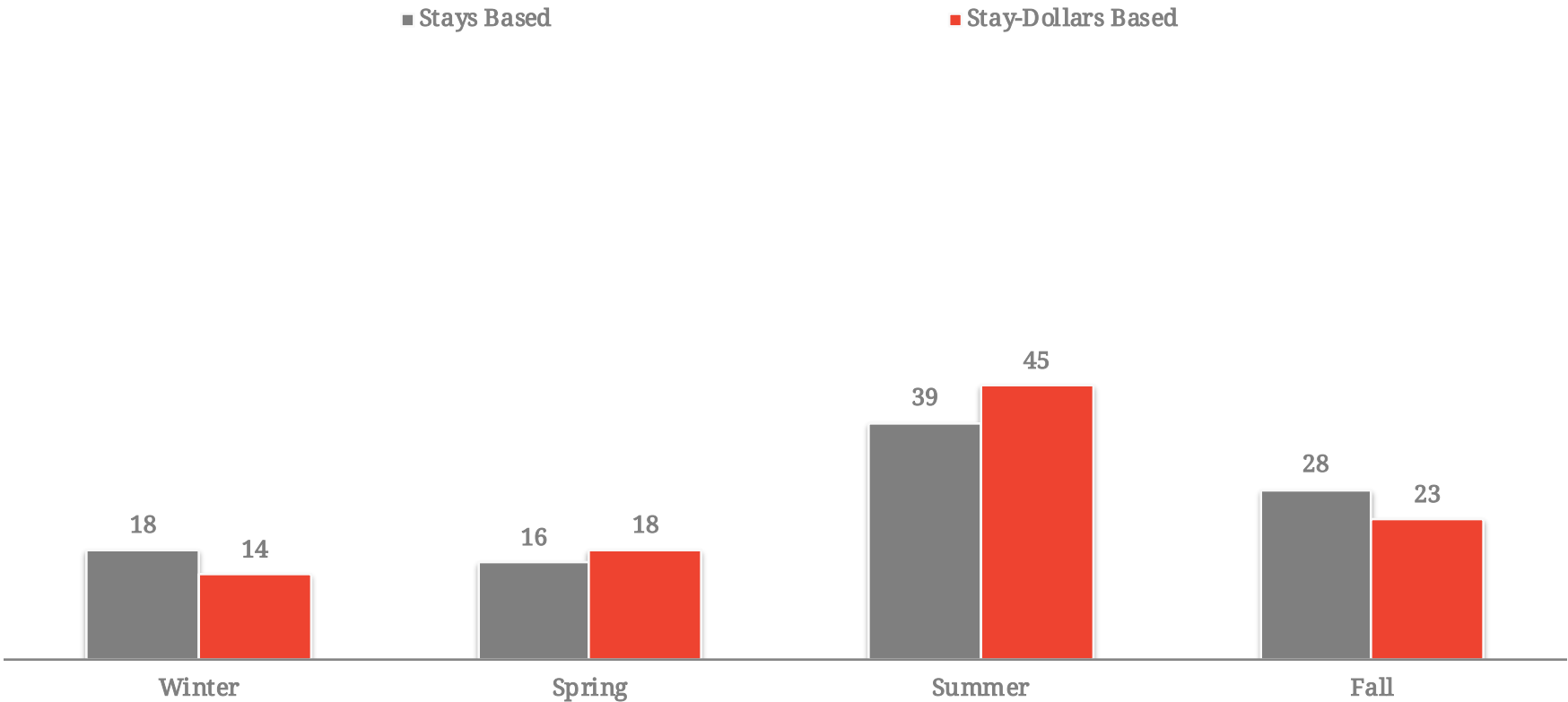


Chart 37 • Segment: 2017-2019 Day Leisure (%) • New Jersey n = 2,419 household count

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

TRIP CHARACTERISTICS

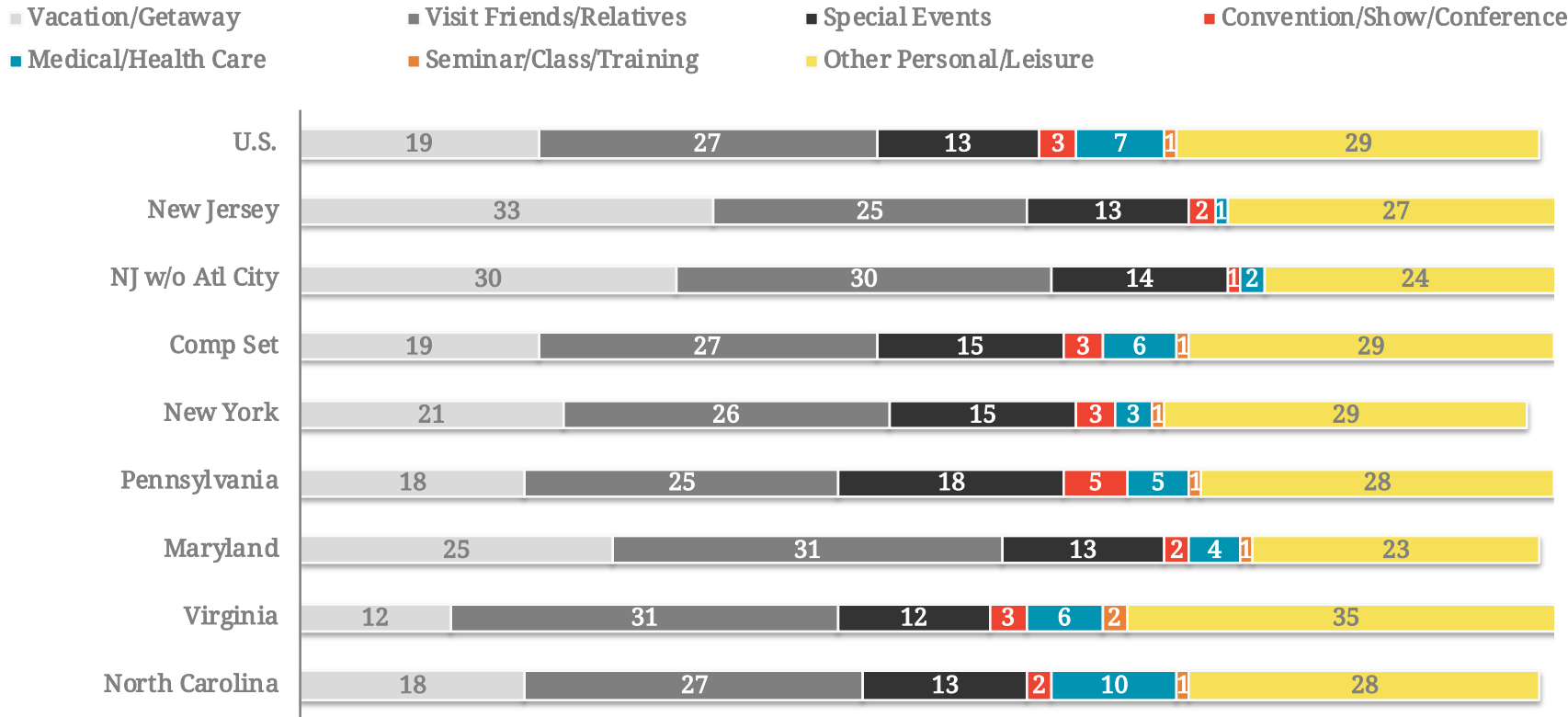


Chart 38 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 771 household count

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

TRIP CHARACTERISTICS

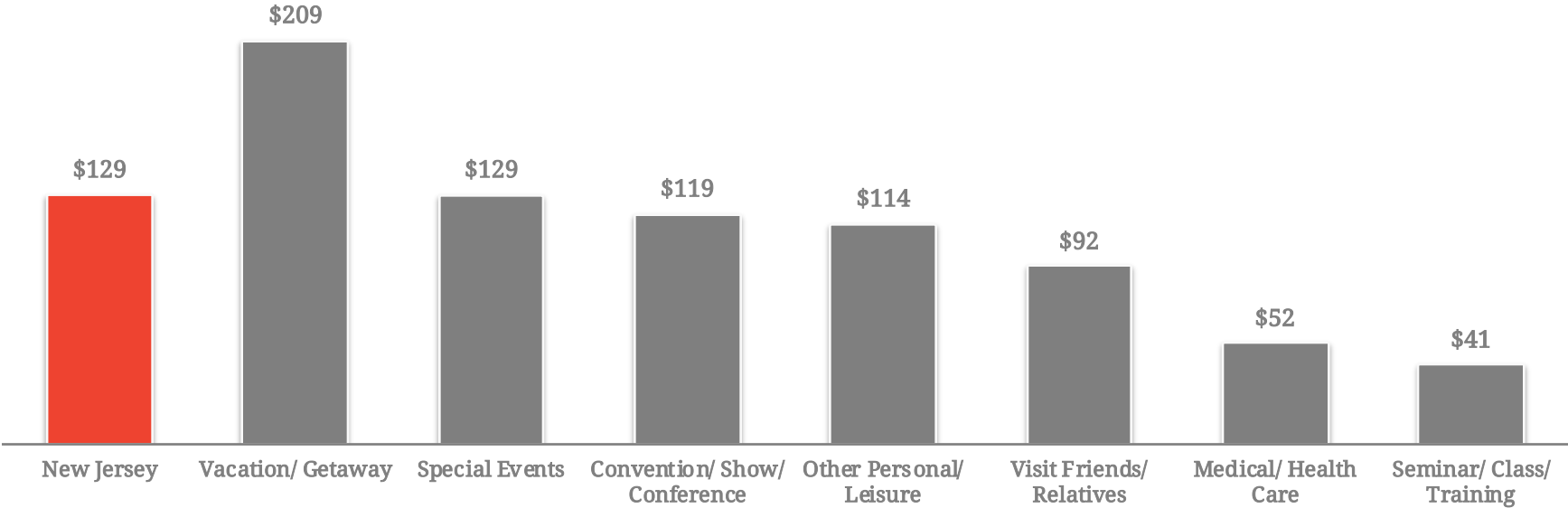


Chart 39 • Segment: 2017-2019 Day Leisure Stays (\$) • New Jersey n = 2,419 household count

New Jersey Purpose of Stay Comparison

TRIP CHARACTERISTICS

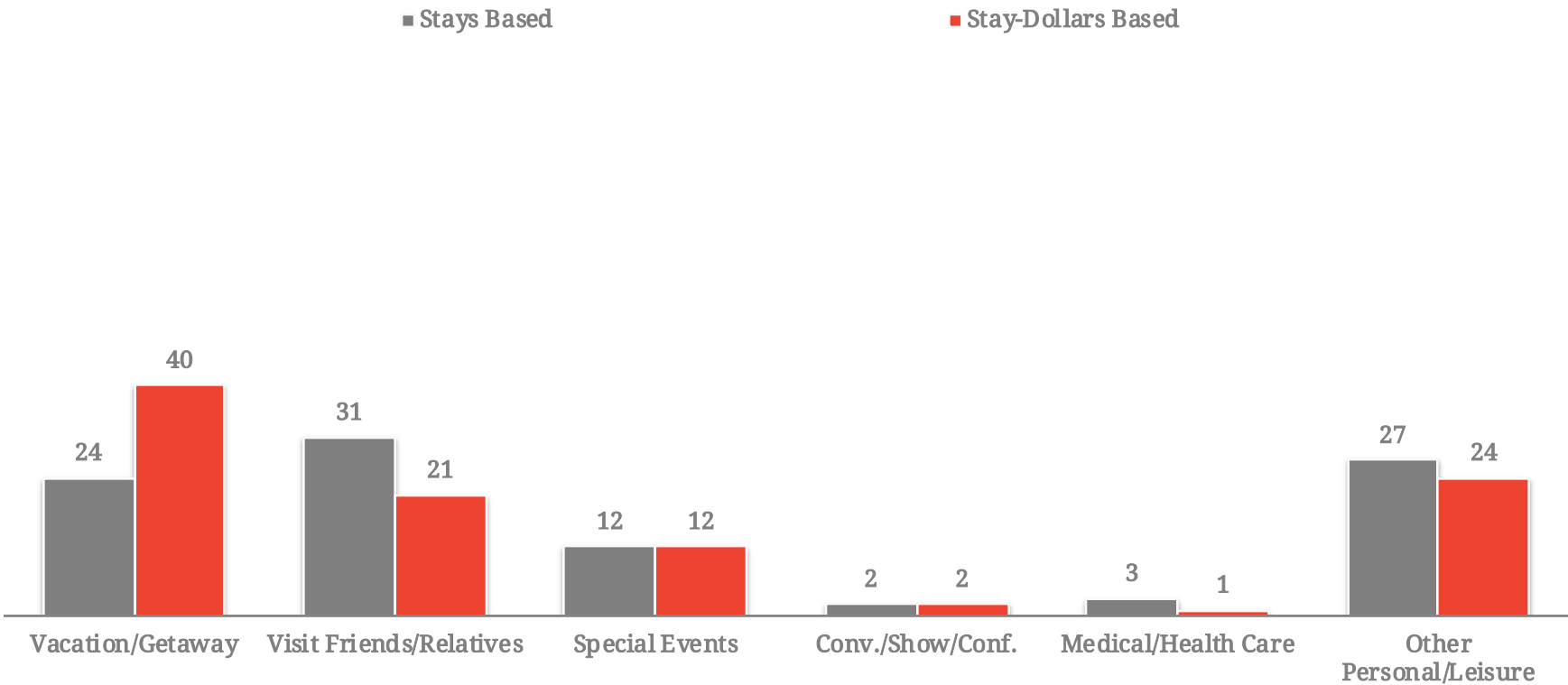


Chart 40 • Segment: 2017-2019 Day Leisure (%) • New Jersey n = 2,419 household count

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

TRIP CHARACTERISTICS

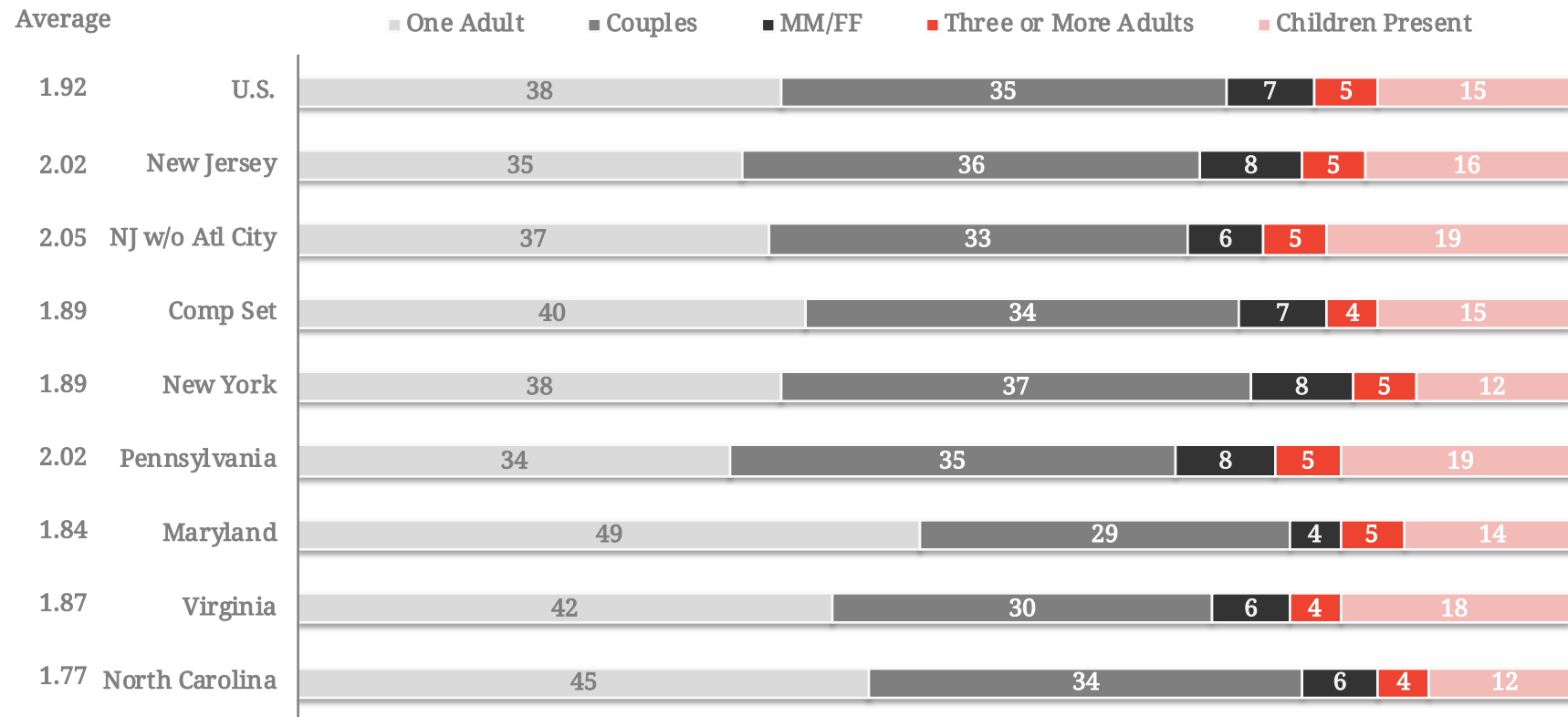


Chart 41 • Segment: 2019 Day Leisure Stays (%) • New Jersey n = 771 household count

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

TRIP CHARACTERISTICS

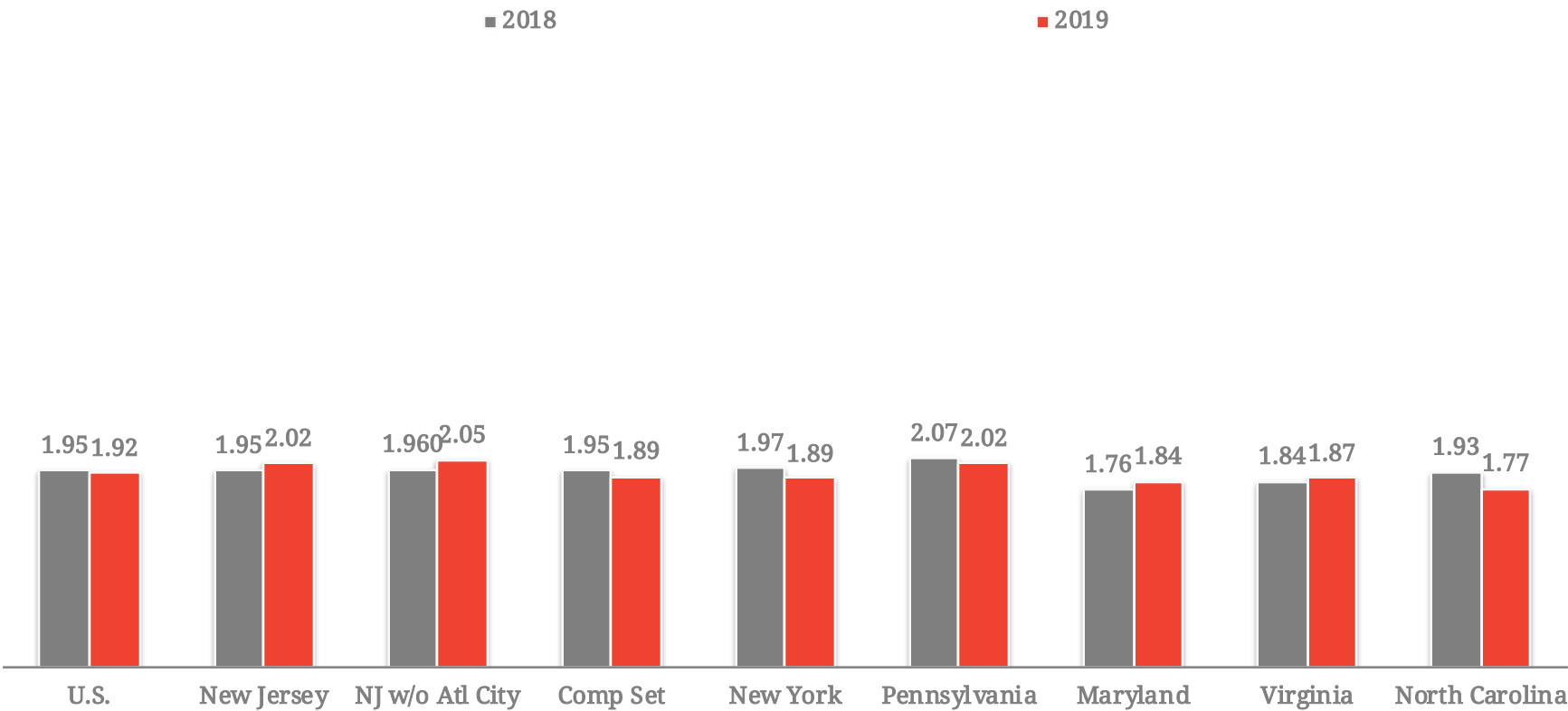


Chart 42 • Segment: 2018/2019 Day Leisure Stays • New Jersey n = 771 household count

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

TRIP CHARACTERISTICS

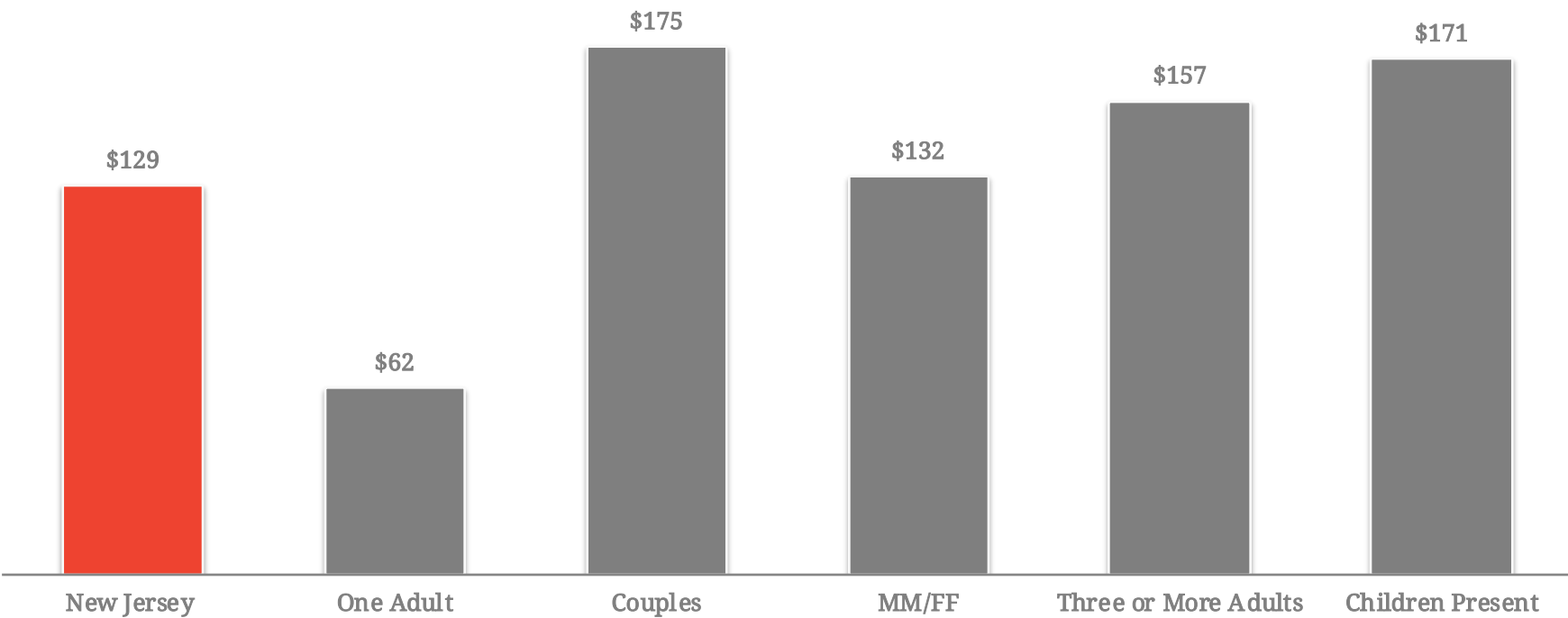


Chart 43 • Segment: 2017-2019 Day Leisure Stays (\$) • New Jersey n = 2,419 household count

New Jersey Travel Party Comparison

TRIP CHARACTERISTICS

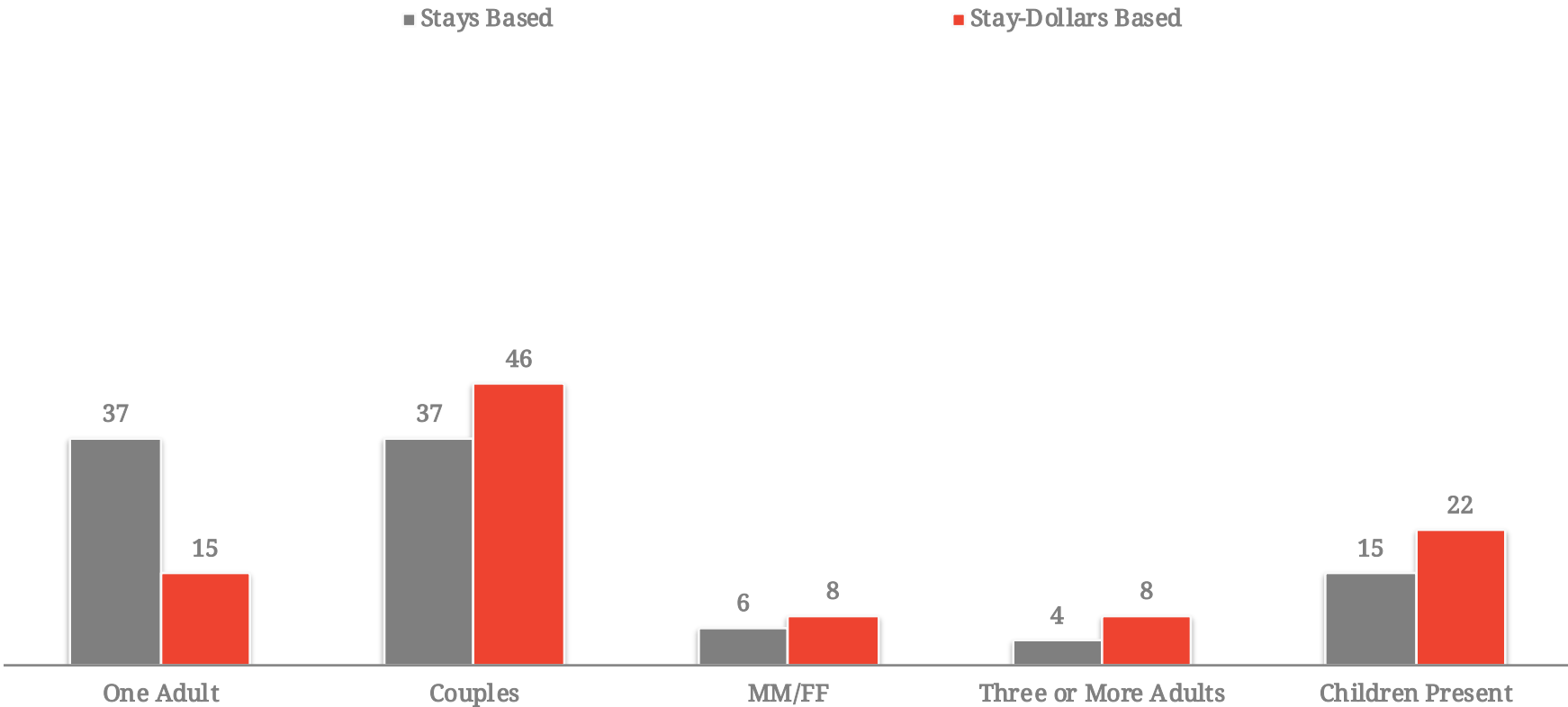


Chart 44 • Segment: 2017-2019 Day Leisure (%) • New Jersey n = 2,419 household count

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

TRIP CHARACTERISTICS

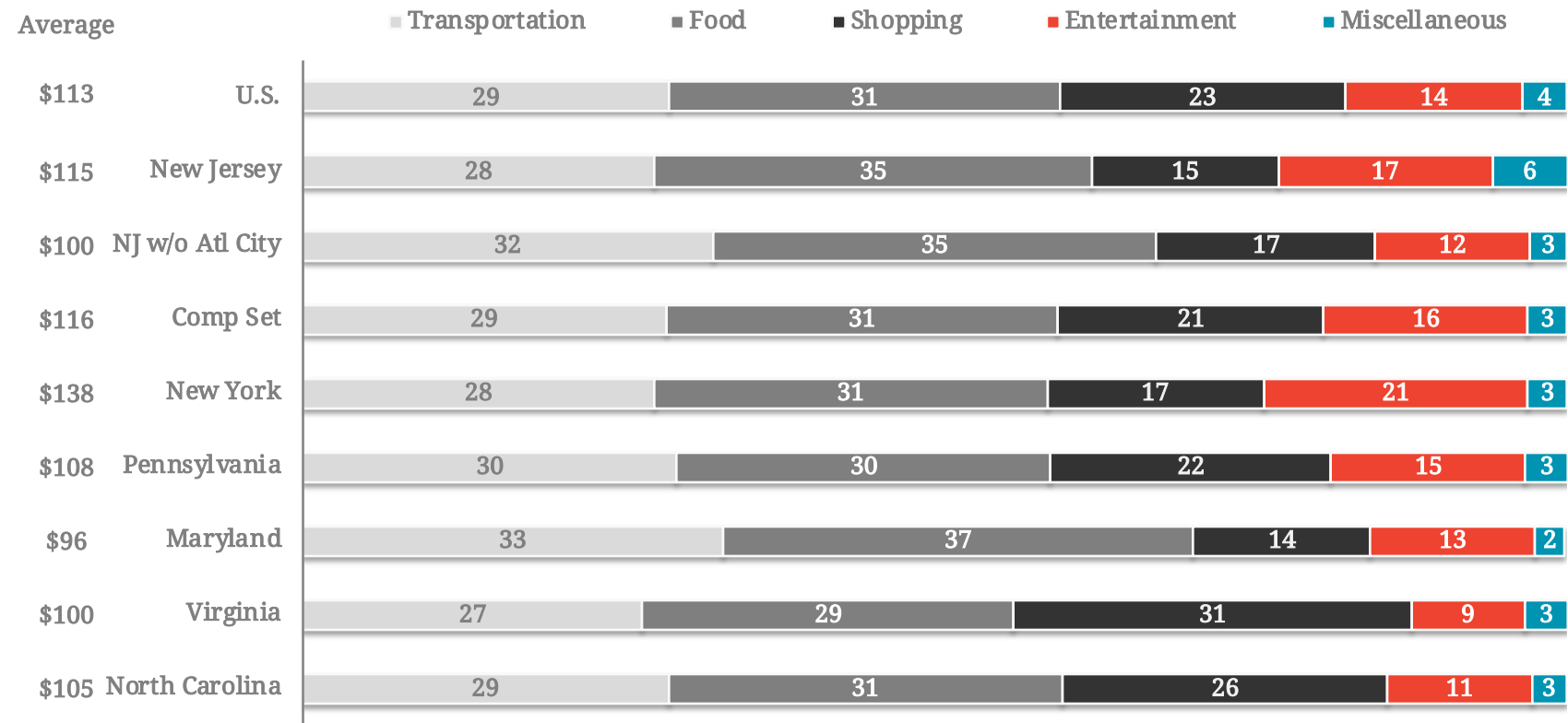


Chart 45 • Segment: 2019 Day Leisure Person-Days (%) • New Jersey n = 763 household count

New Jersey Activity Participation

ACTIVITY PARTICIPATION

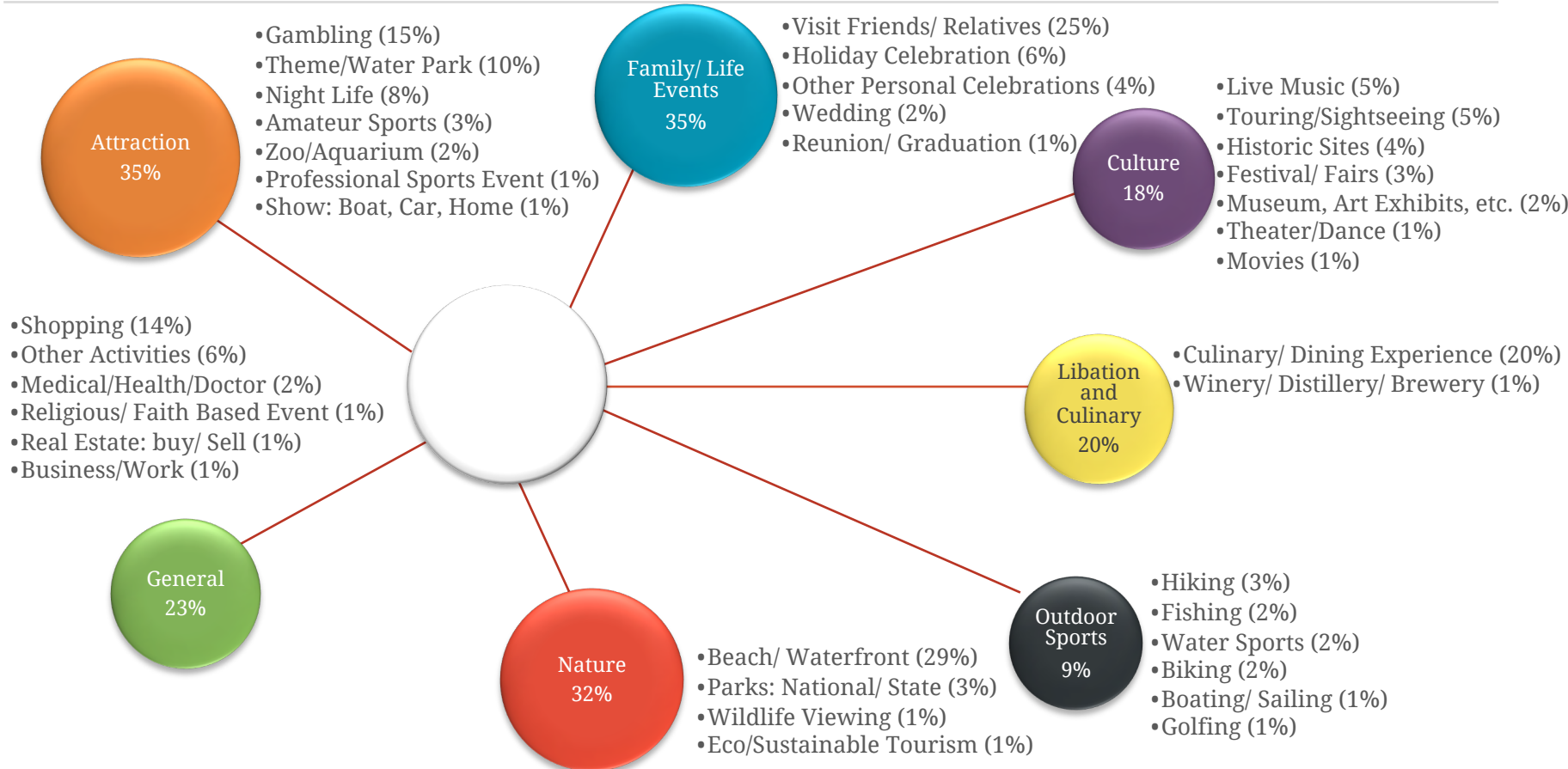


Chart 46 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 771 household count

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	10%	29%	30%	9%	4%	16%	5%	5%
Visit Friends/Relatives	26%	25%	29%	25%	24%	28%	28%	25%
Culinary/Dining Experience	24%	20%	19%	26%	18%	25%	21%	22%
Gambling	5%	15%	1%	5%	4%	4%	*	3%
Shopping	26%	14%	14%	23%	24%	15%	27%	27%
Theme/Amusement/Water Parks	4%	10%	11%	2%	5%	1%	3%	4%
Nightlife	5%	8%	6%	8%	4%	5%	3%	5%
Holiday Celebration (Thanksgiving, July 4th etc.)	5%	6%	6%	6%	4%	3%	5%	5%
Live Music	6%	5%	3%	8%	6%	7%	3%	5%
Touring/Sightseeing	10%	5%	5%	13%	10%	10%	6%	8%
Other Personal Celebrations	7%	4%	4%	6%	7%	6%	5%	7%
Historic Sites	7%	4%	4%	10%	8%	10%	7%	6%
Amateur Sports	4%	3%	3%	3%	3%	4%	7%	4%
Festivals/Fairs (state, craft etc.)	5%	3%	4%	6%	5%	8%	2%	3%
Parks (national, state)	8%	3%	3%	11%	8%	8%	3%	5%
Hiking	4%	3%	3%	4%	2%	5%	2%	3%
Zoo/Aquarium	4%	2%	2%	4%	4%	6%	*	2%
Biking	1%	2%	1%	1%	2%	1%	*	*
Fishing	2%	2%	2%	2%	2%	1%	1%	2%
Medical/Health/Doctor Visit	8%	2%	2%	4%	5%	3%	7%	7%
Wedding	1%	2%	2%	2%	2%	1%	1%	1%
Museums, Art Exhibits, etc.	6%	2%	2%	11%	8%	10%	3%	4%

Chart 47 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 771 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
Water Sports	1%	2%	3%	2%	1%	*	1%	1%
Golfing	1%	1%	1%	2%	1%	1%	1%	1%
Religious/Faith Based Conference	2%	1%	1%	2%	2%	1%	3%	3%
Reunion/Graduation	1%	1%	1%	3%	1%	2%	1%	3%
Theater/Dance Performance	3%	1%	1%	9%	4%	1%	3%	2%
Professional Sports Event	2%	1%	*	4%	5%	3%	*	1%
Boating/Sailing	1%	1%	2%	1%	1%	3%	1%	1%
Show: Boat, Car, Home	3%	1%	2%	5%	3%	2%	3%	3%
Wildlife Viewing (birds, whales, etc.)	3%	1%	1%	3%	2%	2%	1%	2%
Winery/Distillery/Brewery Tours	2%	1%	1%	3%	2%	2%	3%	2%
Eco/Sustainable Travel	1%	1%	1%	1%	*	*	*	*
Movies	3%	1%	1%	3%	3%	3%	5%	4%
Business/Work	1%	*	*	1%	*	1%	2%	1%
Extreme/Adventure Sports	1%	*	*	2%	*	*	1%	*
Funeral/Memorial	1%	*	*	2%	2%	1%	1%	2%
Real Estate (buy/sell)	1%	*	*	1%	*	1%	*	3%
Camping	1%	*	*	1%	1%	*	*	*
Service/Volunteerism/Charity	1%	*	*	1%	1%	2%	1%	2%
Snow/Winter Sports	1%	*	*	2%	*	*	0%	*
Spa	1%	*	*	1%	*	1%	2%	1%
Tennis	*	*	*	1%	*	*	*	1%
Hunting	*	0%	0%	1%	*	*	0%	*

Chart 48 • Segment: 2019 Day Leisure Person-Stays (%) • New Jersey n = 771 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.

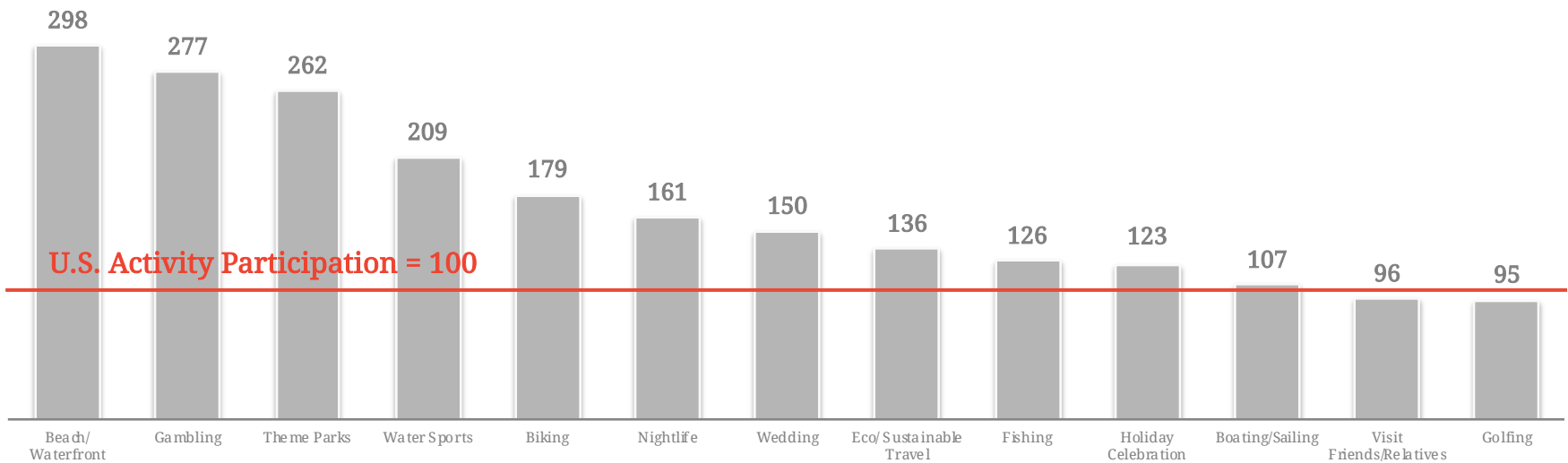


Chart 49 • Segment: 2019 Day Leisure Person-Stays • New Jersey n = 771 household count

New Jersey Avg. Party per Stay Spending by Activities

ACTIVITY PARTICIPATION

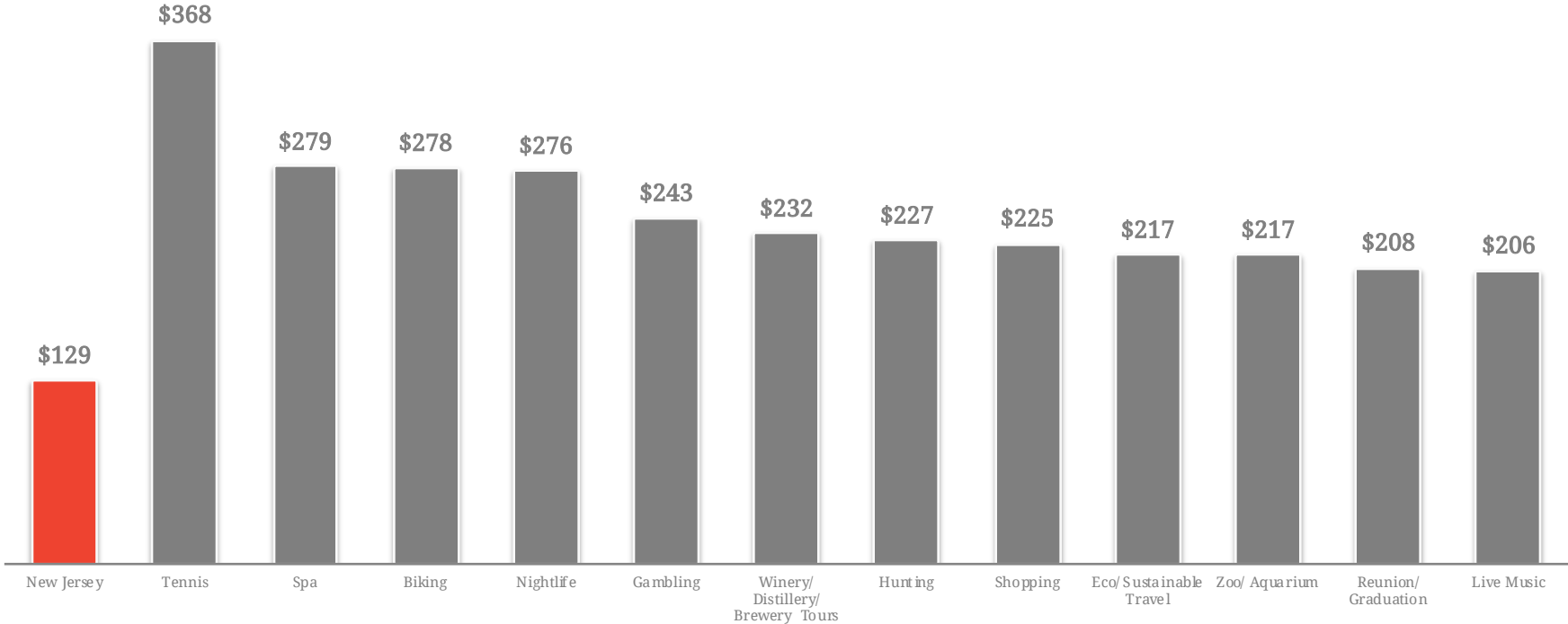


Chart 51 • Segment: 2017-2019 Day Leisure Stays (\$) • New Jersey n = 2,419 household count

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

ACTIVITY PARTICIPATION

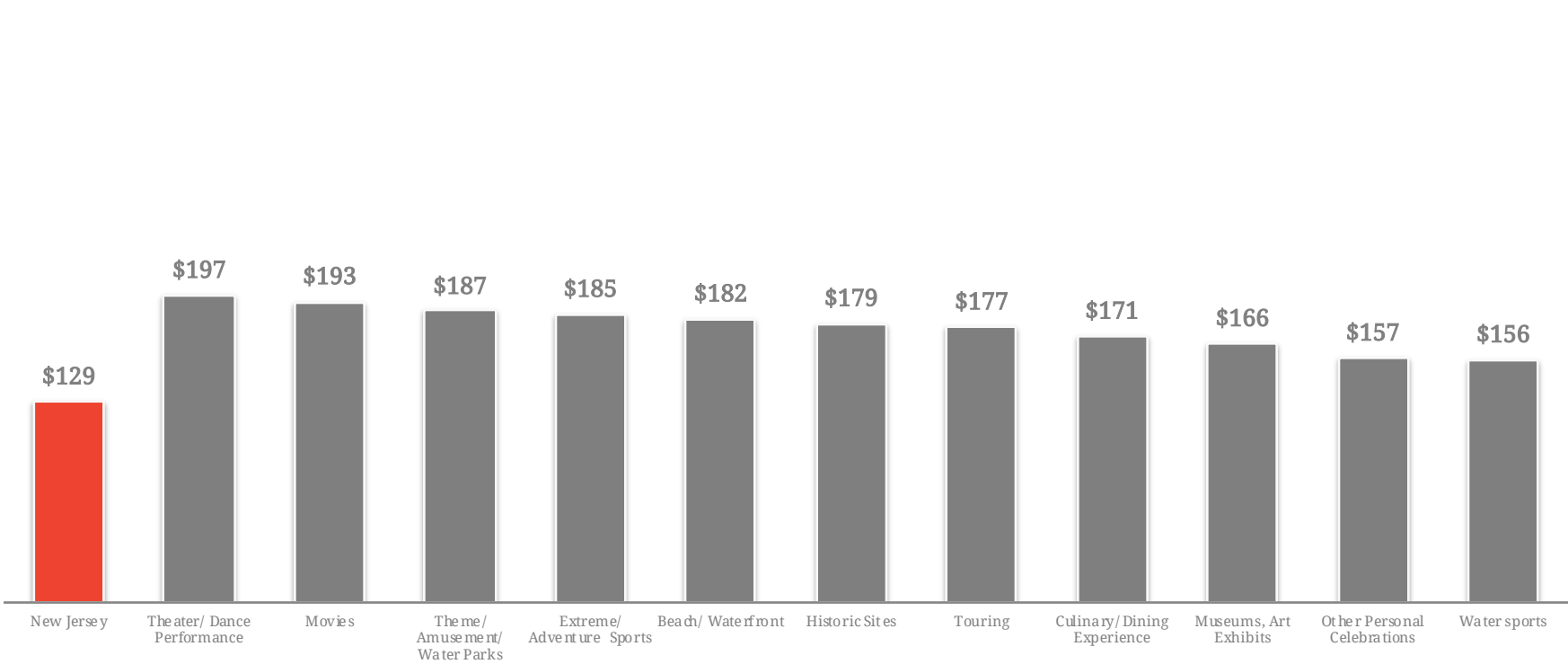


Chart 52 • Segment: 2017-2019 Day Leisure Stays (\$) • New Jersey n = 2,419 household count

New Jersey Activity Comparison

ACTIVITY PARTICIPATION

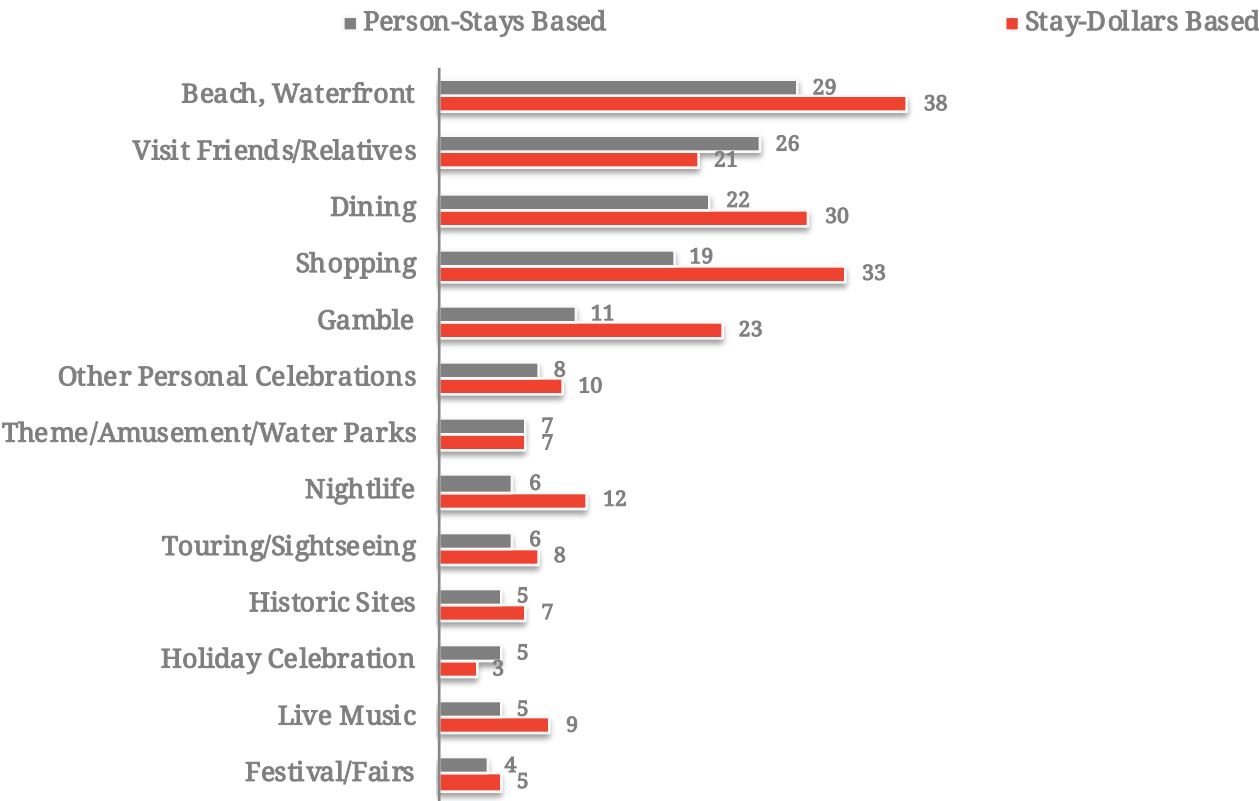


Chart 53 • Segment: 2017-2019 Day Leisure (%) • New Jersey n = 2,419 household count

New Jersey Activity Comparison (cont.)

ACTIVITY PARTICIPATION

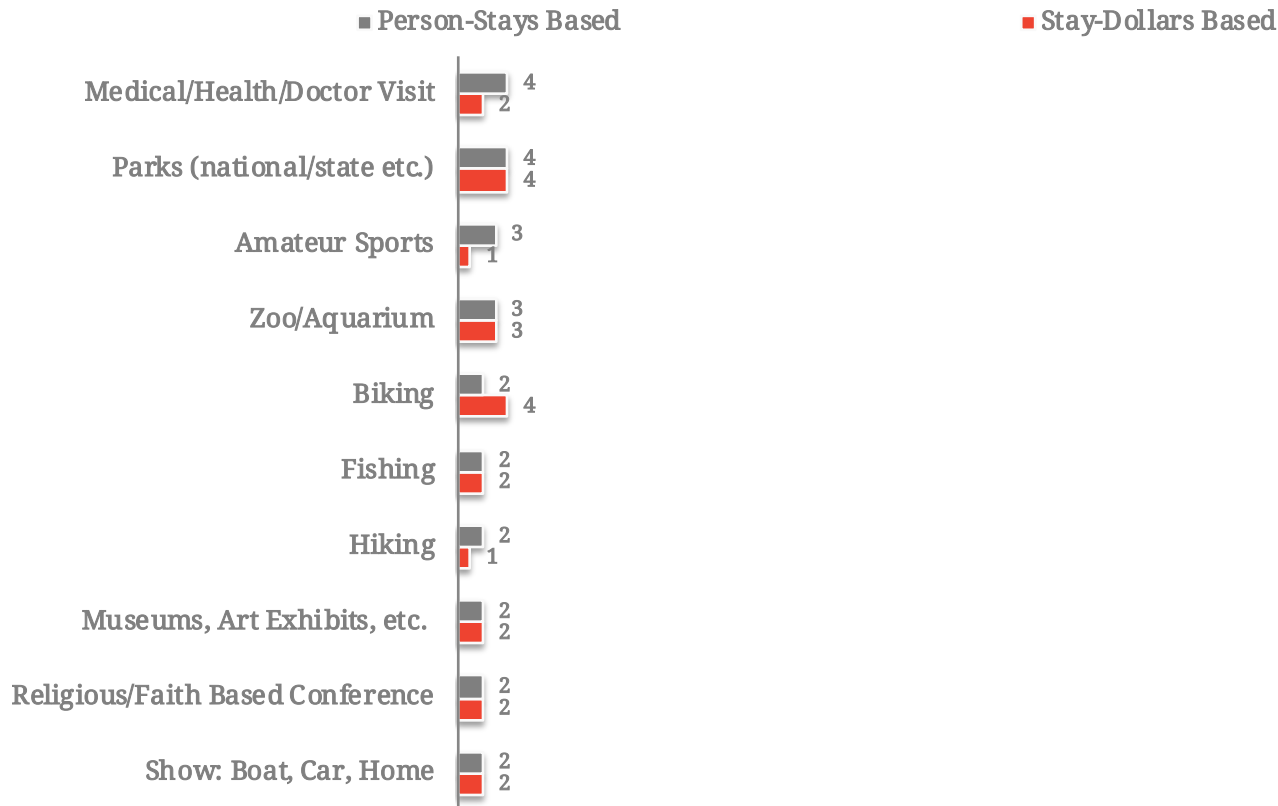


Chart 54 • Segment: 2017-2019 Day Leisure (%) • New Jersey n = 2,419 household count

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)
Average Party Per Stay 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.
Traveling Party	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.

Statistical References

Example:
If the air travel finding for the U.S. is 11% and the sample size is 25,548, using the chart, we can say that at the 90% level of confidence the proportion ranges between 10.7% and 12.5%.

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 (-0.82) 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 2019	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.	24,167	0.1%	0.2%	0.3%	0.4%	0.5%
New Jersey	771	0.6%	1.1%	1.6%	2.2%	3.0%
New York	1,736	0.4%	0.7%	1.0%	1.5%	2.0%
Pennsylvania	1,452	0.4%	0.8%	1.1%	1.6%	2.2%
Maryland	551	0.7%	1.3%	1.8%	2.7%	3.5%
Virginia	633	0.6%	1.2%	1.7%	2.5%	3.3%
North Carolina	758	0.6%	1.1%	1.6%	2.3%	3.0%

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)	783	865	-0.82	(+/-) 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.