

# *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 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 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...  
50 Million Overnight visitors,  
spending...  
\$17.5 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/Monitor<sup>SM</sup>** – the largest travel tracking system in the U.S. The 2019 New Jersey Overnight Leisure Visitor Profile is based on a sample of 932 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 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.

Because of 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 2019.

Travel for business and leisure both saw sizeable increases in 2019, especially among Overnight Leisure travelers.

## New Jersey Fiscal Year 2019 Highlights:

- Record high visitation and spending in 2019
- Continued growth in Overnight Leisure visitor volume and spending
- New Jersey remains 5<sup>th</sup> in market share among its competitors
- Atlantic City is driving up the average age of visitors to New Jersey.
- Beach/Waterfront continues to be number 1 for Activity Participation but this year, Culinary/Dining Experiences also tied for the number 1 spot.
- Non-Atlantic City portions of the state account for the largest share of visitor growth but the smallest share of spend.
- While Pennsylvania is still the top origin state for visitors to New Jersey, New Jersey has moved from the 3<sup>rd</sup> spot to 2<sup>nd</sup> from 2018.

### STUDY SPECIFICATIONS

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

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

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

# 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 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 went up in 2019 to 54 years old, which is older than visitors to the average U.S. destination or to the Competitive Set by four and five years, respectively. New Jersey visitors are less likely to have children in the household (32%, a decrease of 2 percentage points from 2018), 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 an increase in its share of visitors to the State (from 35% in 2018 to 37% in 2019) while the Delaware River region also saw an incline in 2019. All remaining regions displayed decreases from 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 2019, New Jersey increased to 2nd while Pennsylvania remained the number 1 supplier of visitors to the State.

The same activities are in the top 5 for New Jersey in 2019 with no position changed from 2018 although many more activities tied in participation. Looking at New Jersey excluding Atlantic City, gambling increased from 25th in 2018 to 18th 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.

# Executive Summary

Average Destination Satisfaction and Value ratings for the State remain high (8.53 and 8.35 respectively on a 10-point scale) and both the Satisfaction average and the Value for the Money average decreased from 8.61 and 8.45 respectively in 2018. For both dimensions, the non-Atlantic City portion of the State saw similar decreases from 2018, but both Satisfaction (8.62) and Value (8.44) are higher compared to the whole State. Average Hotel Satisfaction rating have risen to 8.5 from 2018 (8.4). Many variables can impact perceived satisfaction and value including changes in pricing or changes in the perceived quality or availability of the produce. 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 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
- 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 Oversight 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, more than any of its competitors)
- New Jersey is a preferred summer travel destination (June, July, August)
- Pennsylvania, New Jersey, and New York are primary Origin States for travel
- Largest share of Overnight Leisure visitors arrive from New York and Philadelphia DMAs (average one-way travel distance of 208 miles)
- New Jersey received higher average destination ratings but lower average hotel ratings without Atlantic City
- Majority plan trip to New Jersey between 2 weeks and 3 months

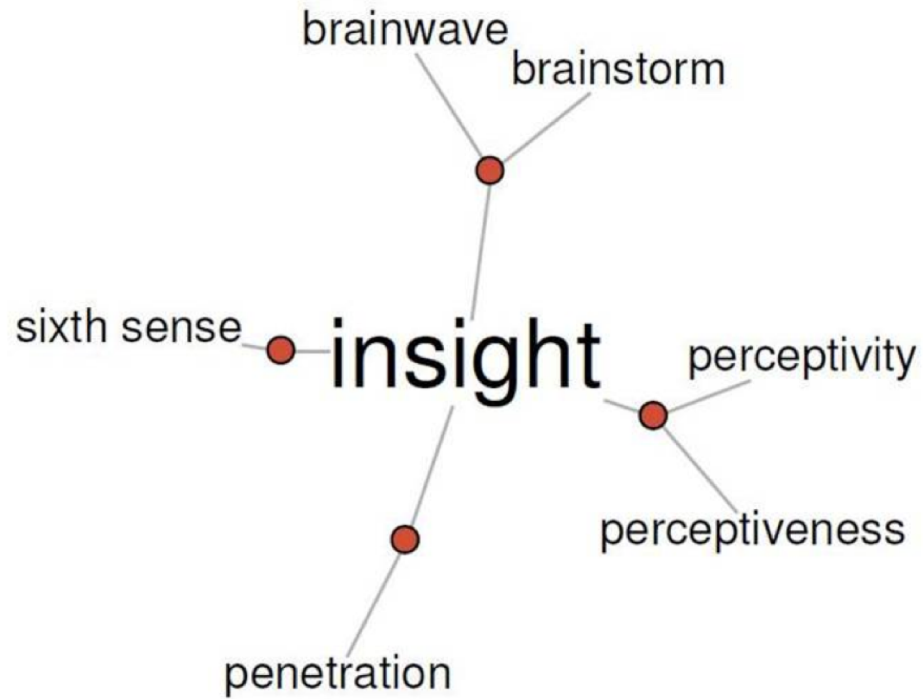
# Executive Summary

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 Hotels/Motels and Paid Non-Hotels
- Travelers staying 3+ night stays
- Visitors traveling in travel parties of 3+ adults or with children
- Visitors traveling for General Vacations
- Summer travelers



## Travel Year Review

New Jersey 2019 Overnight Leisure Visitor Profile

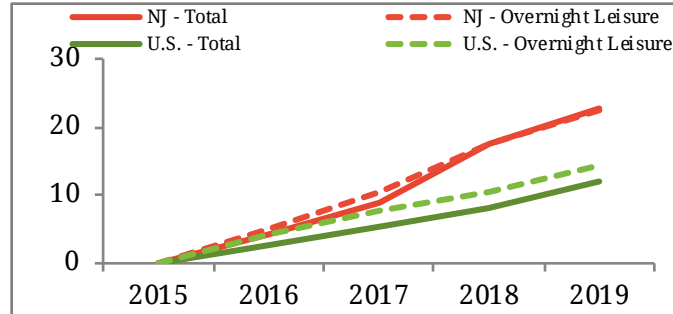
# Visitor Volume and Spending

New Jersey hosted 50 million overnight leisure visitors, spending 17.5 billion dollars in 2019 – another all time high for both visitors and spending in the State. Spending grew at a lower rate (4.6%) than the average U.S. destination (5.0%) over 2018. With the exception of business, all New Jersey travel segments displayed increases in spending from 2018.

Overnight Leisure travelers make up about 43.4% of all New Jersey's travelers – a share that's fairly consistent over the past years. In terms of their spending, overnight leisure travelers contribute 72.4% to New Jersey's Total Spending.

## Visitor Volume

PERSON-STAYS (millions) INDEXED TO 2015

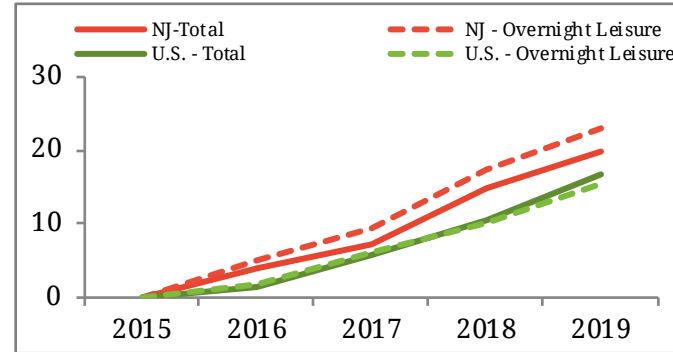


114.8 Million Visitors — 4.4% ↑

49.9 Overnight Leisure — 4.3% ↑

## Visitor Spending

DIRECT SPENDING (billions) INDEXED TO 2015



\$24.2 Billion Dollars — 4.3% ↑

\$17.5 Overnight Leisure — 4.6% ↑

## 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

# Visitor Volume and Spending

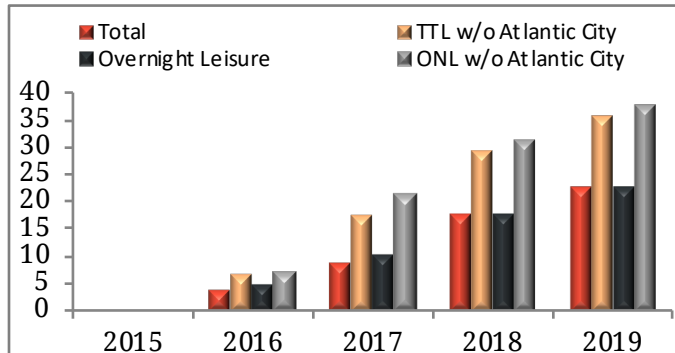
Visitation to, and spending in, Atlantic City has always had a substantial impact on the overall statistics for New Jersey, but this may be changing.

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 2019, 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.

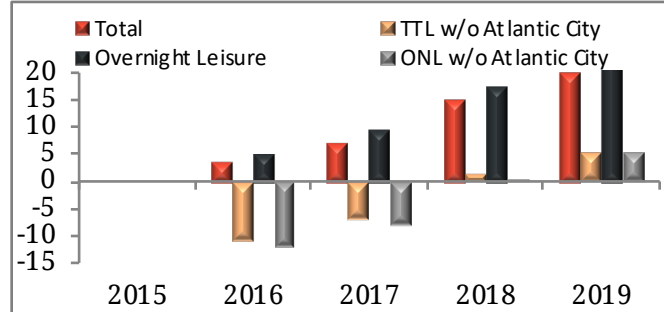
## Visitor Volume

PERSON-STAYS (% change) INDEXED TO 2015



## Visitor Spending

SPENDING (% change) INDEXED TO 2015



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 visitor to New Jersey, the impact of their travel party is significant.

**Non-Atlantic City**  
destinations driving growth in  
Overnight Leisure visitors



## Destination Market Share

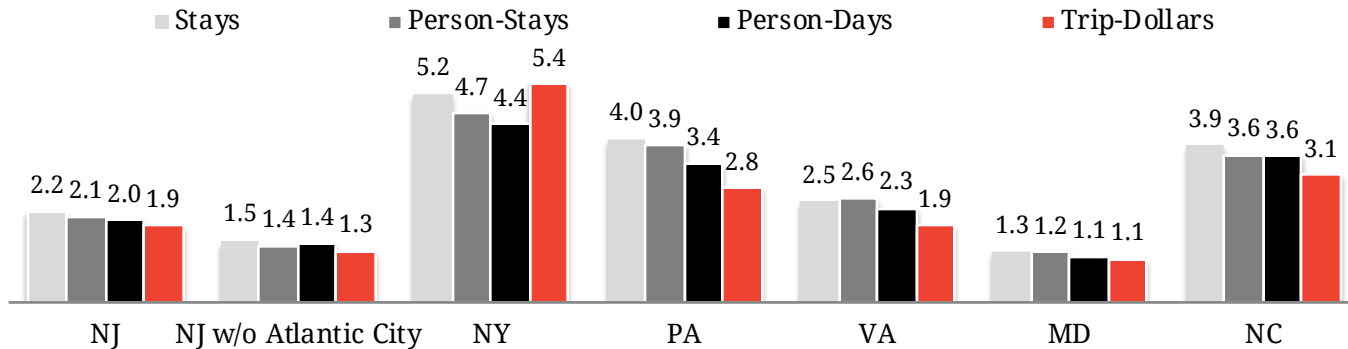
Overall, the impact of New Jersey's visitation on the share of the US travel market remained consistent from 2018. Among all its competitors, New Jersey's Overnight Leisure traveler segment captured the fifth largest shares of the US travel market in all four travel metrics – Stays, Person-Stays, Person-Days, and Trip-Dollars. Pennsylvania and North Carolina saw decreases in market share in 2019, while the rest remained relatively consistent.

New Jersey's Overnight Leisure travel parties (or Stays) represent 2.24% of the US Overnight 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 Overnight Leisure travelers (or Person-Stays), the main focus of this report, represent 2.11% 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 2019 (%)



New Jersey remained consistent in the Overnight Leisure segment in all four metrics

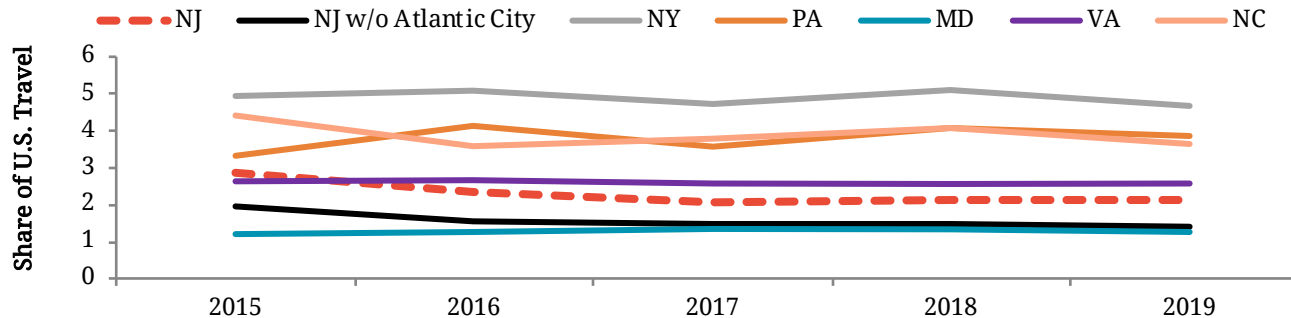
# Destination Market Share

The Person-Days metric is simply the total number of days that visitors contributed to New Jersey. New Jersey's Overnight Leisure travelers represent 2.01% of the US Overnight market share. New Jersey Overnight Leisure travelers contributed the smallest of all four metrics in Trip-Dollars to the US Overnight Leisure market; 1.9% 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

OVERNIGHT LEISURE PERSON-STAYS (%)



Atlantic City contributes about 1/3<sup>rd</sup> of New Jersey's market shares in all four metrics

# Demographics

## Who are New Jersey's Overnight Leisure visitors?

New Jersey's visitors can be described in three ways; basic demographics, lifestages and by generation. With the exception of age, 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, displaying an increase in average age, increasing in percentage of Boomers and decreasing in percentage of Millennials. New Jersey welcomes slightly older travelers

than the US which is not only reflected in higher shares of Boomers, but also in higher shares of travelers who are retired.

Average incomes of New Jersey visitors decreased in 2019 but are still consistently higher than visitors to the average U.S. destination. Incomes of those visiting destinations other than Atlantic City for Overnight Leisure stays have decreased.

## 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)	54	51	50	49
Employed	53%	56%	63%	64%
Retired	33%	27%	25%	24%
Average Income (000)	\$107.7	\$98.0	\$105.8	\$108.9
Children in HH	33%	38%	34%	32%
Children in Travel Party	15%	18%	15%	13%
Generations:				
Millennial (1981+)	23%	30%	29%	30%
GenX (1965-1980)	24%	26%	29%	29%
Boomer (1946-1964)	45%	37%	36%	35%
Silent/GI (1945 back)	8%	7%	6%	6%

New Jersey Visitors...

More Boomers  
More Retired  
Higher HH income  
than the US

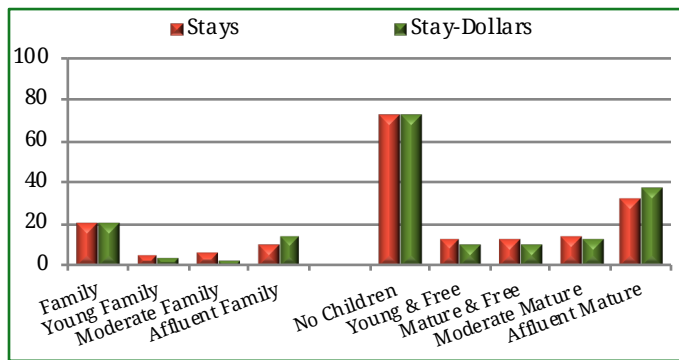
# Demographics

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 Mature Lifestage is the most profitable segment for both the State and the State excluding Atlantic City, just beating out the Affluent Family Lifestage.

## New Jersey

OVERNIGHT LEISURE (%) (2017-2019)

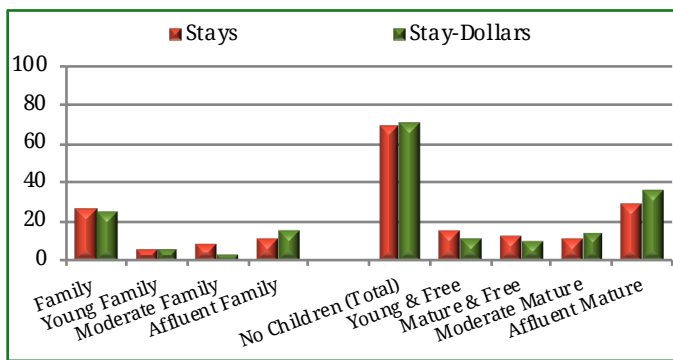


## DK Shifflet Lifestage Definitions

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 without Atlantic City

OVERNIGHT LEISURE (%) (2017-2019)



Affluent Mature:  
Most profitable

## Where do New Jersey's visitors come from?

Almost 8 out of 10 New Jersey visitors come from 5 states with about 25% coming from New Jersey itself and an additional 42% 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 208 miles – the lowest among the average U.S. destination and New Jersey's competitors. One half of travelers live in a vicinity of less than 100 miles.

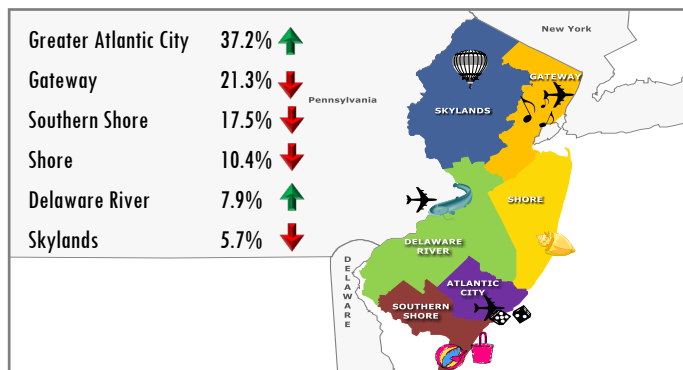
## New Jersey Origin States

OVERNIGHT LEISURE PERSON-STAYS (%) (2019)

Pennsylvania	25.7%
New Jersey	25.3%
New York	15.9%
Florida	6.8%
Massachusetts	4.2%
Maryland	4.2%
Virginia	2.9%
Other	7.6%

## New Jersey Destination Regions

OVERNIGHT LEISURE PERSON-STAYS (%) (2019)



## Where do New Jersey's visitors go?

The Greater Atlantic City Region saw one of the few increases in 2019 continuing to receive the largest share of New Jersey's Overnight Leisure visitors.

The Delaware River also experienced an increase in visitation in 2019, while the remaining regions saw decreases in visitation.

67% of New Jersey visitors come from the tri-state area

# Travel Purpose

## Why do travelers visit New Jersey?

Getaway Weekends and visiting Friends or Relatives each account for over one quarter of Overnight Leisure visitors to New Jersey in 2019. However, if Atlantic City is excluded, Getaway Weekends drop significantly and the overwhelming reason for Overnight Leisure travel becomes to Visit Friends or Relatives.

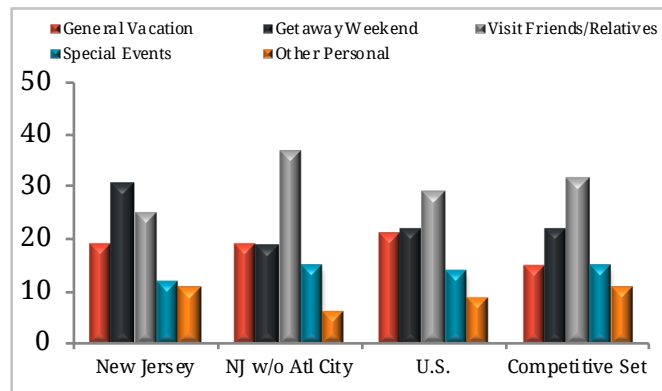
Although Purpose of Travel remained stable in 2019 Special Events decreased while travelers for Other Personal Leisure purpose increased.

Visitors attending Special Events also increases 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 2019 visitors spent on average \$117 in New Jersey per person per day - \$5 more than in 2018 with increases in all expenditure categories with the exception of transportation (decreasing \$3), food and beverage and miscellaneous expenses, which both remained stable. Atlantic City is driving the average daily spending for the State. Again demonstrating the value of the Atlantic City area.

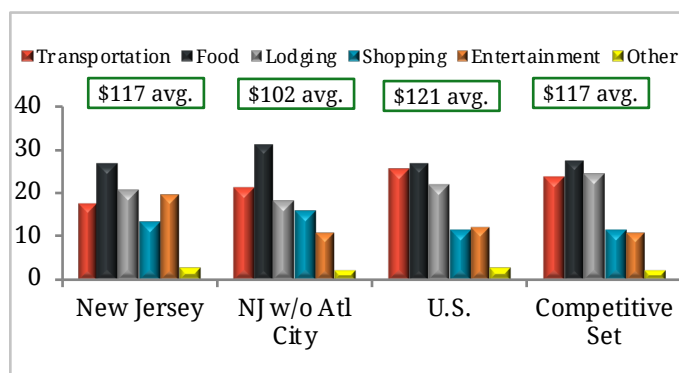
## Purpose of Travel

OVERNIGHT LEISURE PERSON-STAYS (%) (2019)



## Per-Person-Per-Day Spending

OVERNIGHT LEISURE PERSON-DAYS (%) (2019)



Atlantic City area drives  
Weekend Getaways  
and Spending

# Accommodations

## What type of accommodations do they stay in?

In 2019, 65% of Overnight Leisure visitors to New Jersey stayed in paid accommodations, which is just under the average U.S. destination and similar to the Competitive Set (67% and 65%, respectively). Among those staying in New Jersey's paid accommodations, 54% stay in hotels.

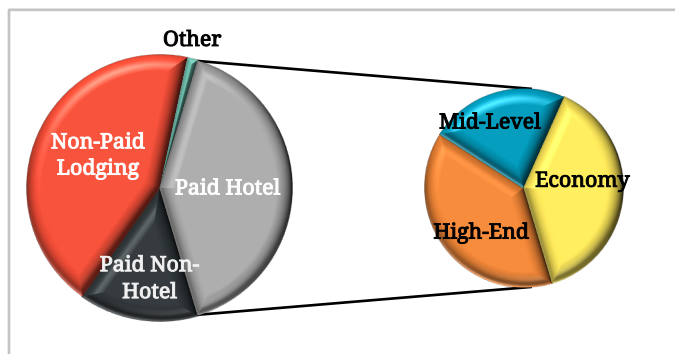
When Atlantic City is excluded from the analysis the percentage of visitors staying in paid accommodations drops to 48%, which is less than either the average U.S. destination or the Competitive Set. The percentage of paid accommodation visitors who stay in hotels drops to about 34%.

Among those visiting regions excluding Atlantic City, 43% are staying with Friends or Relatives. Thus, it is clear that the Atlantic City region is driving the large number of hotel stays in the State.

Visitors to New Jersey excluding Atlantic City spend more per day on lodging than those visiting the average U.S. destination. When Atlantic City is excluded, visitors spend more per day on lodging than the state as a whole despite lower spending averages overall.

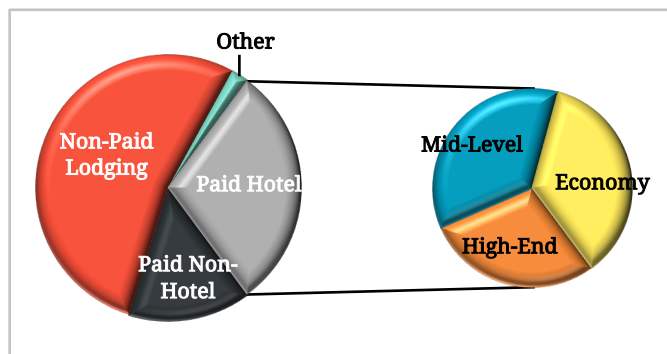
### New Jersey

OVERNIGHT LEISURE PERSON-STAYS (2019)



### New Jersey without Atlantic City

OVERNIGHT LEISURE PERSON-STAYS (2019)



Among New Jersey as a whole, those who stay in hotels, choose both High-End and Economy properties equally.

# Party Composition/Stay Length

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

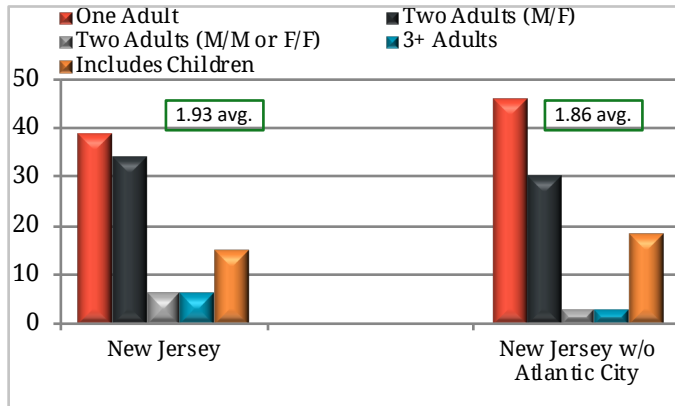
Travel parties consisting of one or two adults account for eight in ten of New Jersey's Overnight Leisure travel.

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

At 1.93 persons, New Jersey's travel party average is slightly smaller than the Competitive Set (1.95 persons). If we exclude Atlantic City, the average size decreases to 1.86 persons.

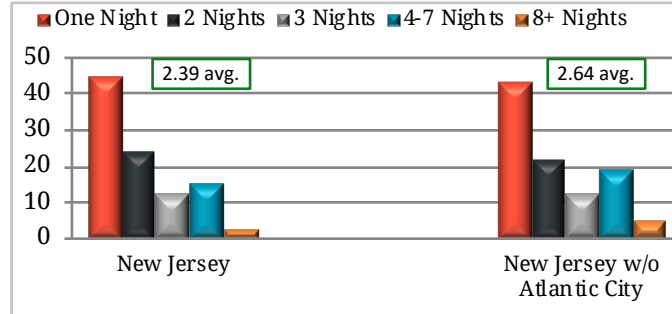
### Travel Party Composition

OVERNIGHT LEISURE (%) STAYS (2019)



## Stay Length

OVERNIGHT LEISURE (%) STAYS – (1+ NIGHTS) (2019)



Among Overnight Leisure visitors, New Jersey travel parties stay 2.39 nights on average. Excluding Atlantic City with its many Weekend Getaway travelers results in a higher 2.64 nights length of stay – the longest among all competitors.

The average length of stay has declined from 2018.

Excluding Atlantic City:  
Longer Length of Stay  
than the Competitive Set



## What do New Jersey visitors do?

Nine in 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 2019:

1. Culinary/Dining Experience and Beach/Waterfront
2. Gambling
3. Shopping and Visiting Friends/Relatives
4. Live Music and Nightlife
5. Other Personal Celebrations and Holiday Celebration

Compared to 2018, Beach/Waterfront decreased substantially while Gambling increased.

When excluding Atlantic City, the top five activities change slightly and Gambling drops to 18<sup>th</sup> place in 2019:

1. Beach/Waterfront
2. Visiting Friends/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 (4.6 times as high)
- Bicycling (2.0 times)
- Religious/Faith Based Conference (2.0 times)
- Beach/Waterfront (1.9 times)
- Water Sports (1.5 times)
- Live Music (1.3 times)
- Holiday Celebration (1.3 times)
- Movies (1.2 times)
- Culinary/Dining Experience (1.2 times)
- Nightlife (1.2 times)

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

- Bicycling (3.0 times as high)
- Religious/Faith Based Conference (3.0 times)
- Water Sports (2.0 times)
- Beach/Waterfront (1.9 times)
- Holiday Celebration (1.6 times)
- Funeral/Memorial (1.5 times)
- Theme/Amusement/Water Parks (1.4 times)
- Festivals/Fairs (state, craft, etc.) (1.2 times)
- Culinary/Dining experience (1.1 times)
- Visiting Friends/Relatives (1.1 times)

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

# Performance Ratings

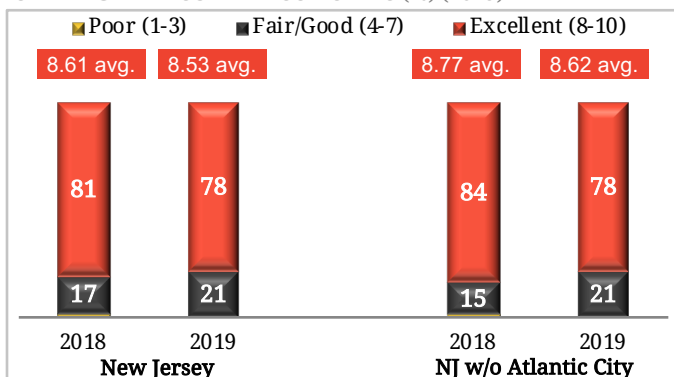
## How do New Jersey visitors rate the State?

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'.

Overnight Leisure visitors report strong satisfaction (78% 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. However, excellent satisfaction ratings for New Jersey, whether or not Atlantic City is included, had sizeable decreases in 2019 to 8.53 (New Jersey whole) and 8.62 (New Jersey without Atlantic City).

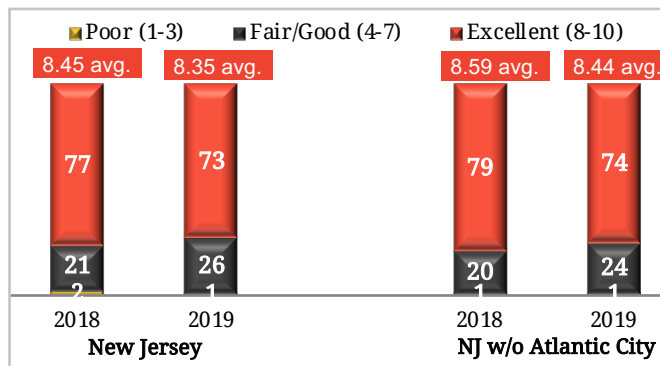
### Overall Satisfaction

OVERNIGHT LEISURE PERSON-STAYS (%) (2019)



## Value for the Money

OVERNIGHT LEISURE PERSON-STAYS (%) (2019)

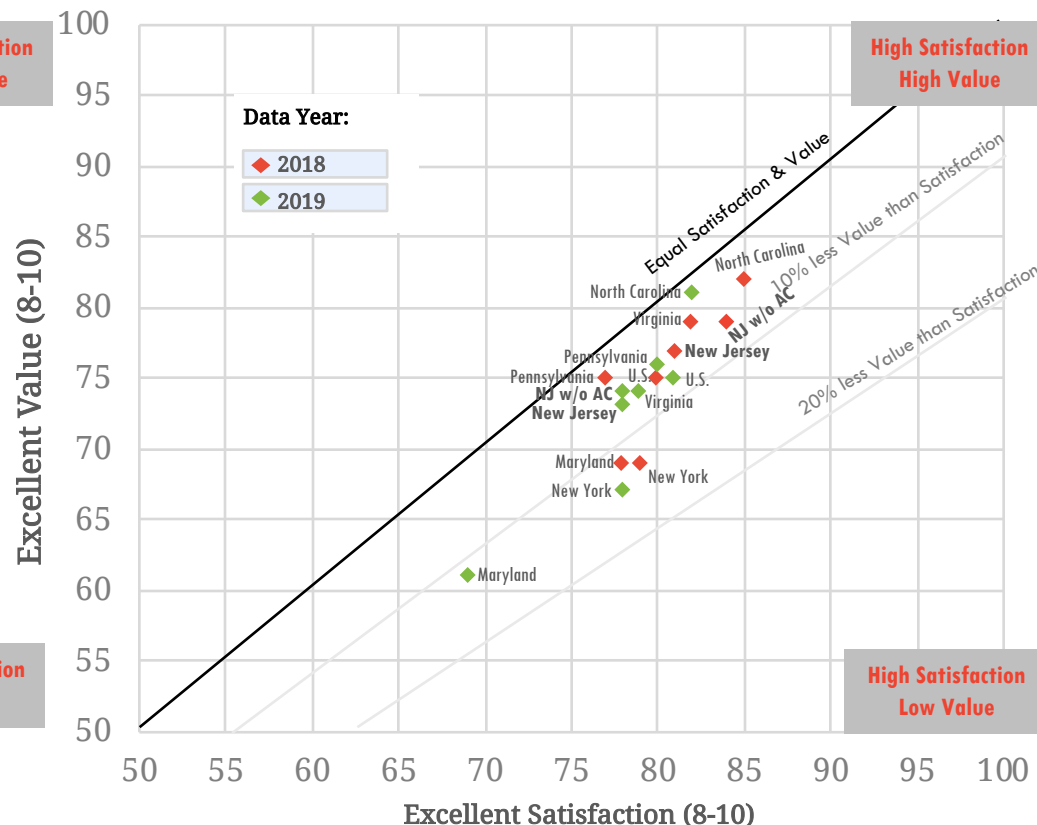


Overall, New Jersey's Overnight Leisure travelers report their highest ratings for satisfaction (8.53), followed by Friendly/Helpful people (8.45), and Feeling of Safety (8.41). All ratings decreased in 2019.

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

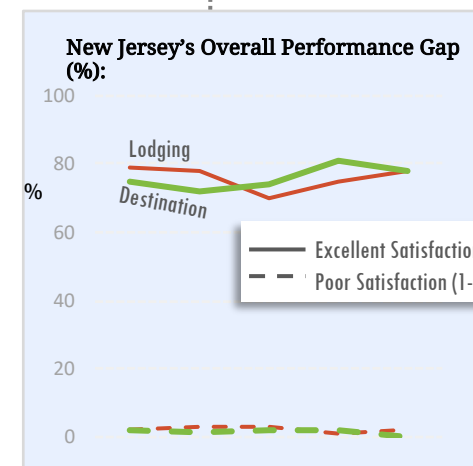
Satisfaction and Value  
Strong

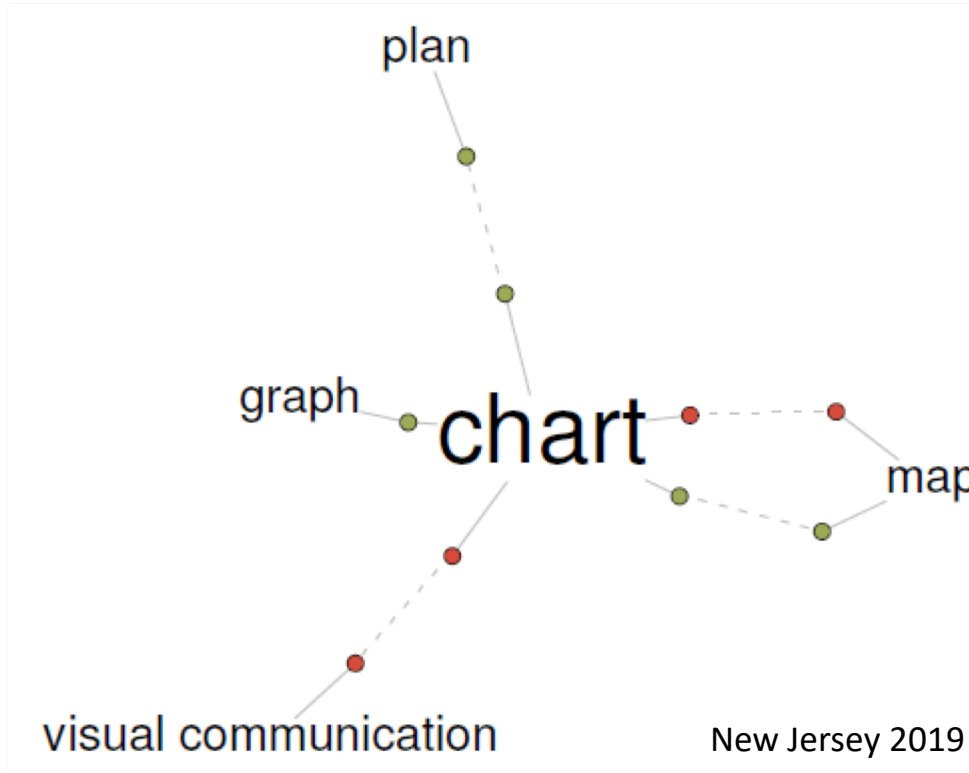
# Performance Ratings



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 2019 Overnight Leisure Visitor Profile

# U.S. Travel Segments

VOLUME

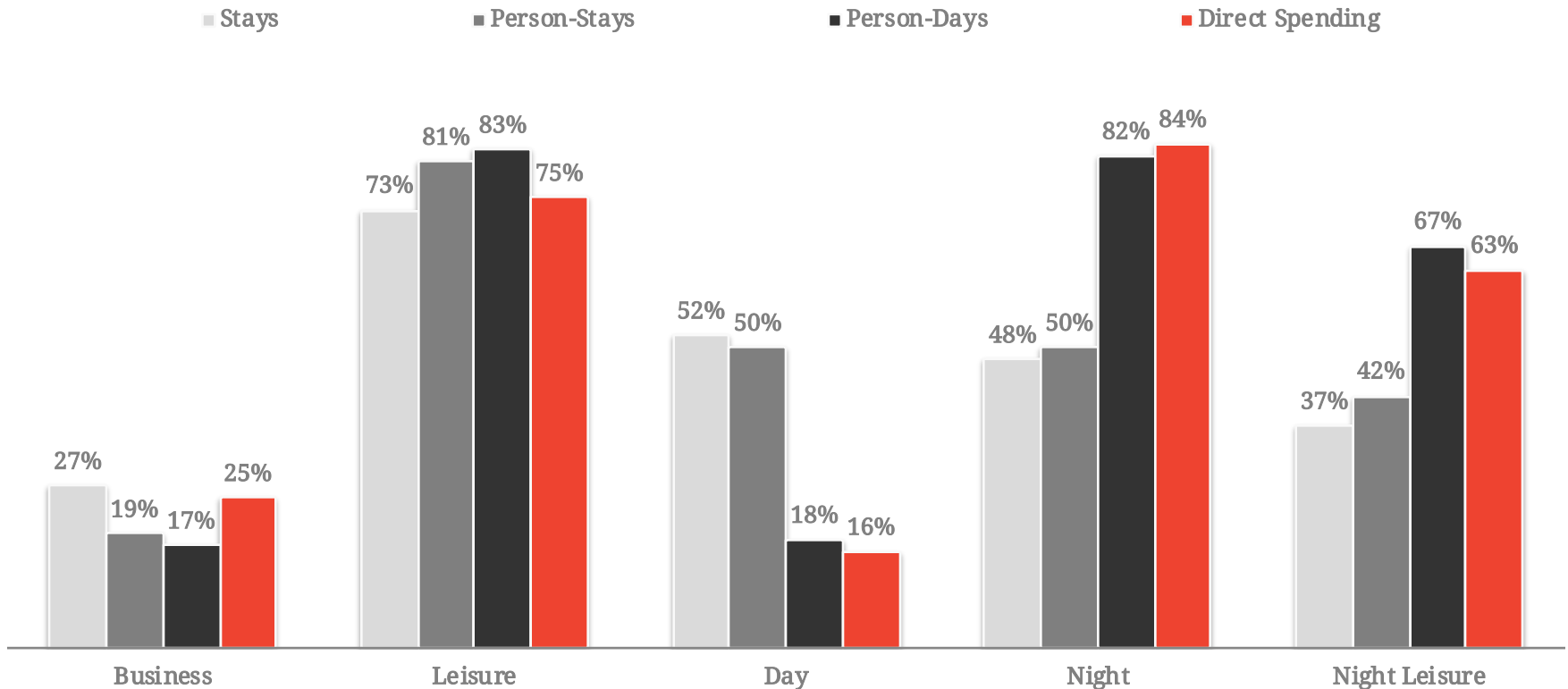


Chart 1 • Segment: 2019 Total Volume (%)

# New Jersey Travel Segments

VOLUME

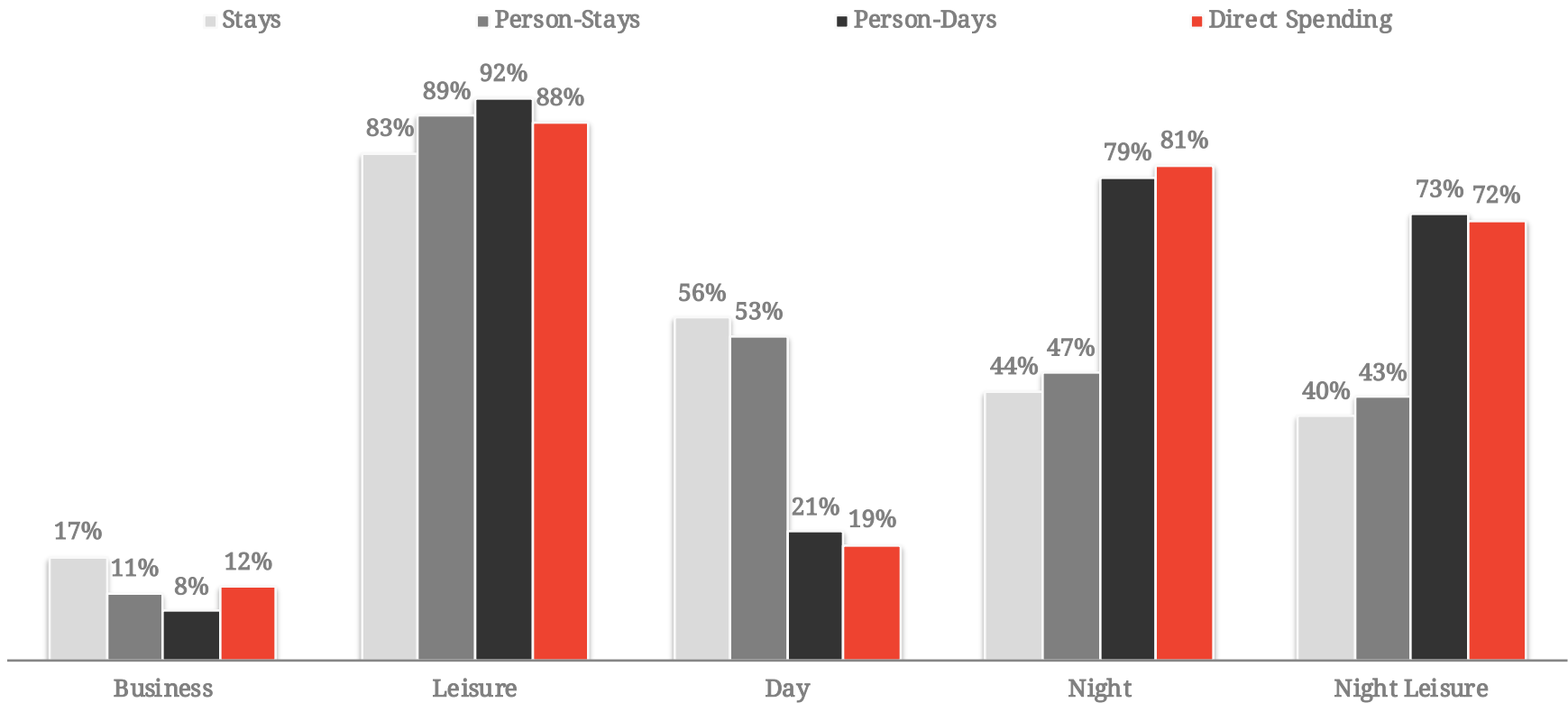


Chart 2 • Segment: 2019 Total Volume (%)

# New Jersey Person-Stays Volume

VOLUME

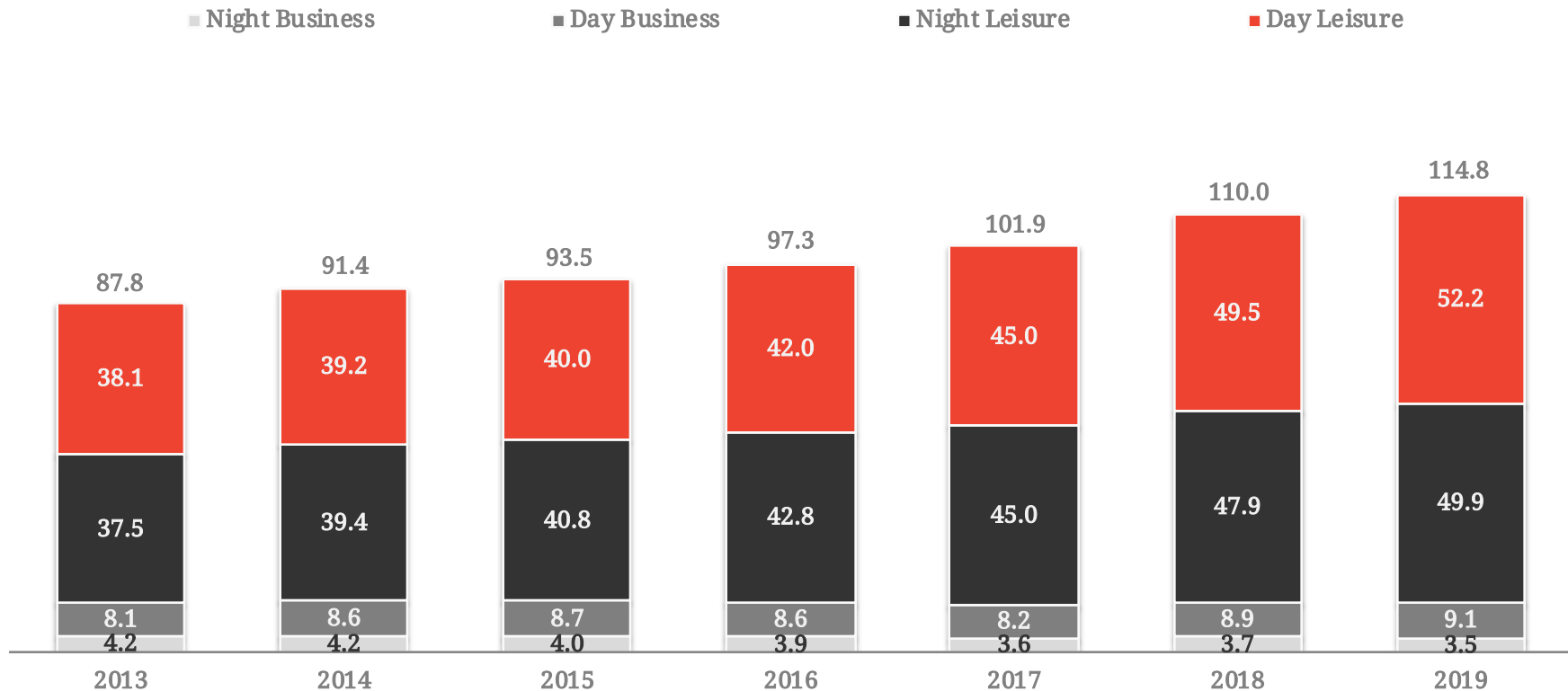


Chart 3 • in Millions

# New Jersey Person-Stays Volume

VOLUME

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

Chart 4 • % change



# New Jersey Direct Spending Volume

**DIRECT SPENDING**

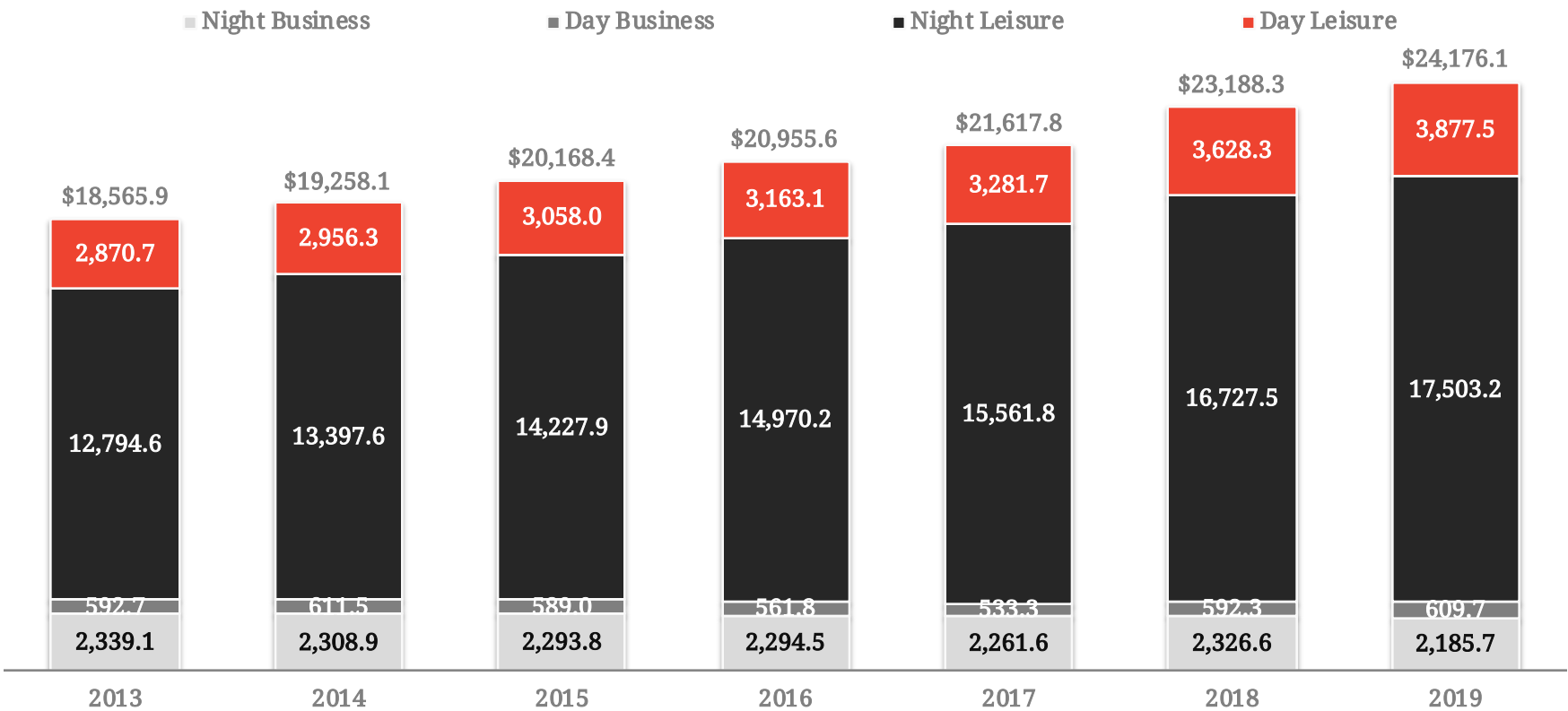


Chart 5 • \$ Millions

# 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
<b>Total</b>	3.7%	4.7%	3.9%	3.2%	7.3%	4.3%	5.6%
<b>Business</b>	0.1%	-0.7%	-2.1%	-1.7%	2.1%	-1.3%	6.0%
<b>Leisure</b>	4.4%	5.7%	4.9%	3.9%	8.0%	5.0%	5.5%
<b>Day</b>	3.0%	2.2%	2.1%	2.4%	10.6%	6.3%	9.1%
<b>Night</b>	3.9%	5.3%	4.3%	3.3%	6.5%	3.8%	5.0%
<b>Day Business</b>	3.2%	-3.7%	-4.6%	-5.1%	11.1%	2.9%	11.7%
<b>Day Leisure</b>	3.0%	3.4%	3.4%	3.8%	10.6%	6.9%	8.4%
<b>Night Business</b>	-0.7%	0.0%	-1.4%	-0.9%	0.0%	-2.4%	5.1%
<b>Night Leisure</b>	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

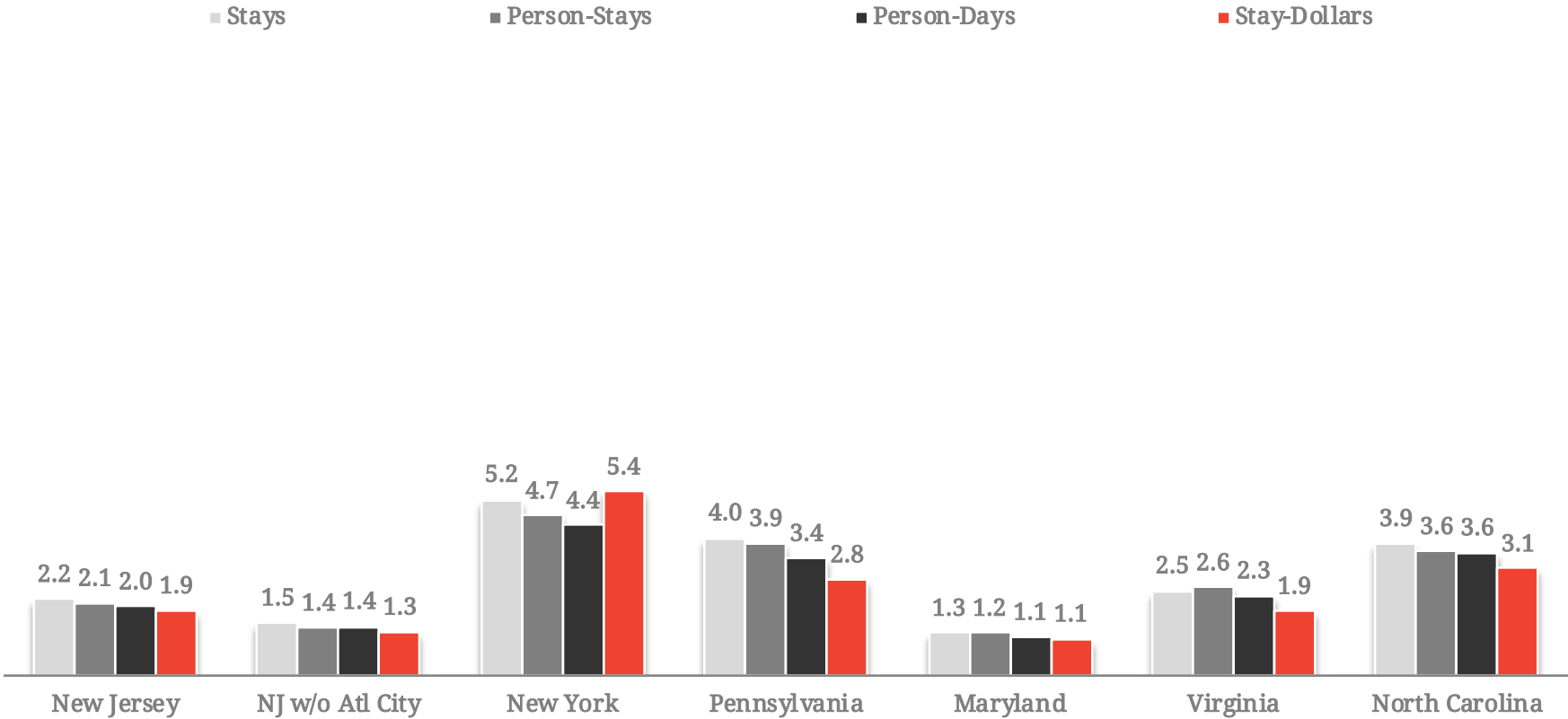


Chart 7 • Segment: 2019 Overnight Leisure (%) • New Jersey n = 932 household count

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

DEMOGRAPHICS

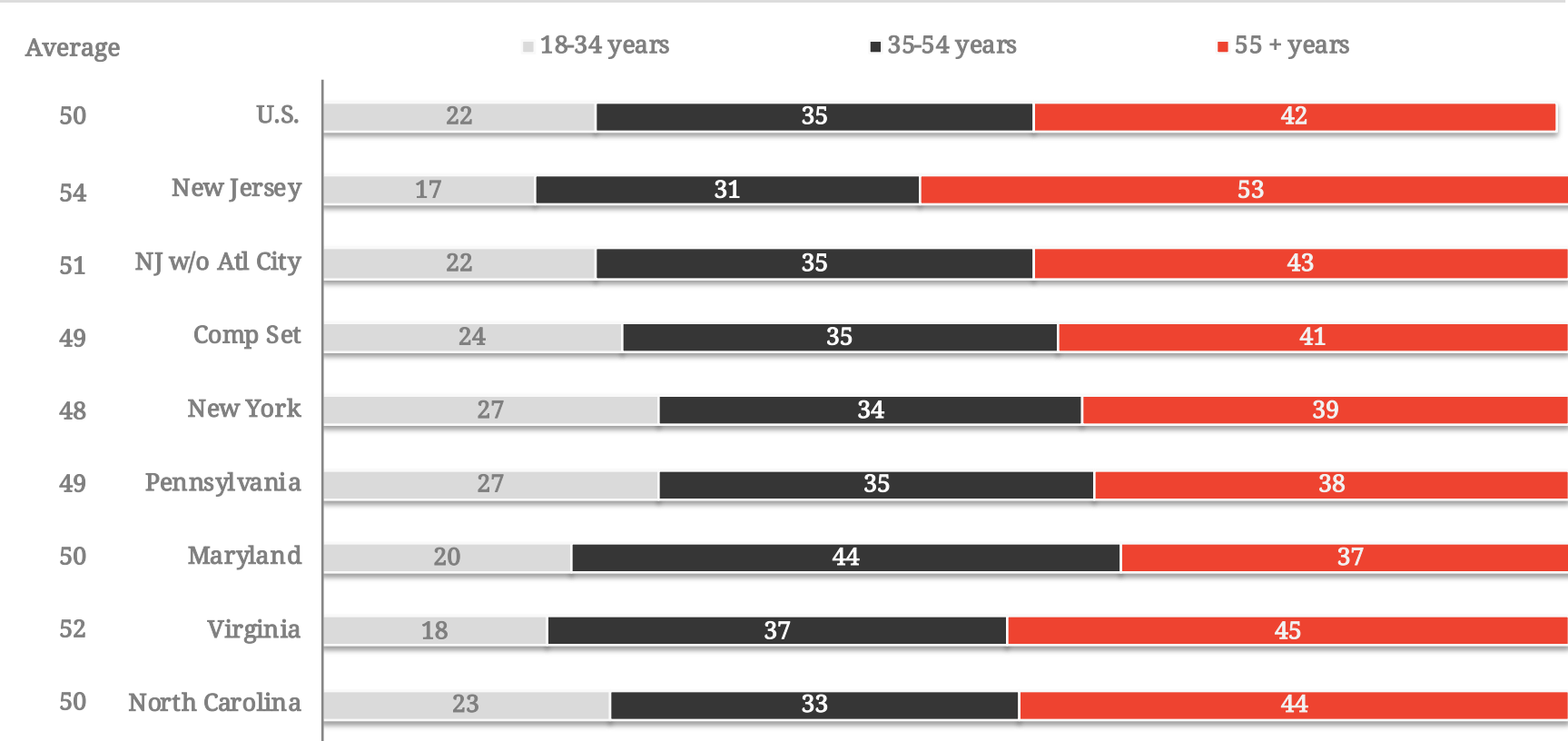


Chart 8 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 931 household count

# New Jersey Avg. Party per Stay Spending by Age

DEMOGRAPHICS

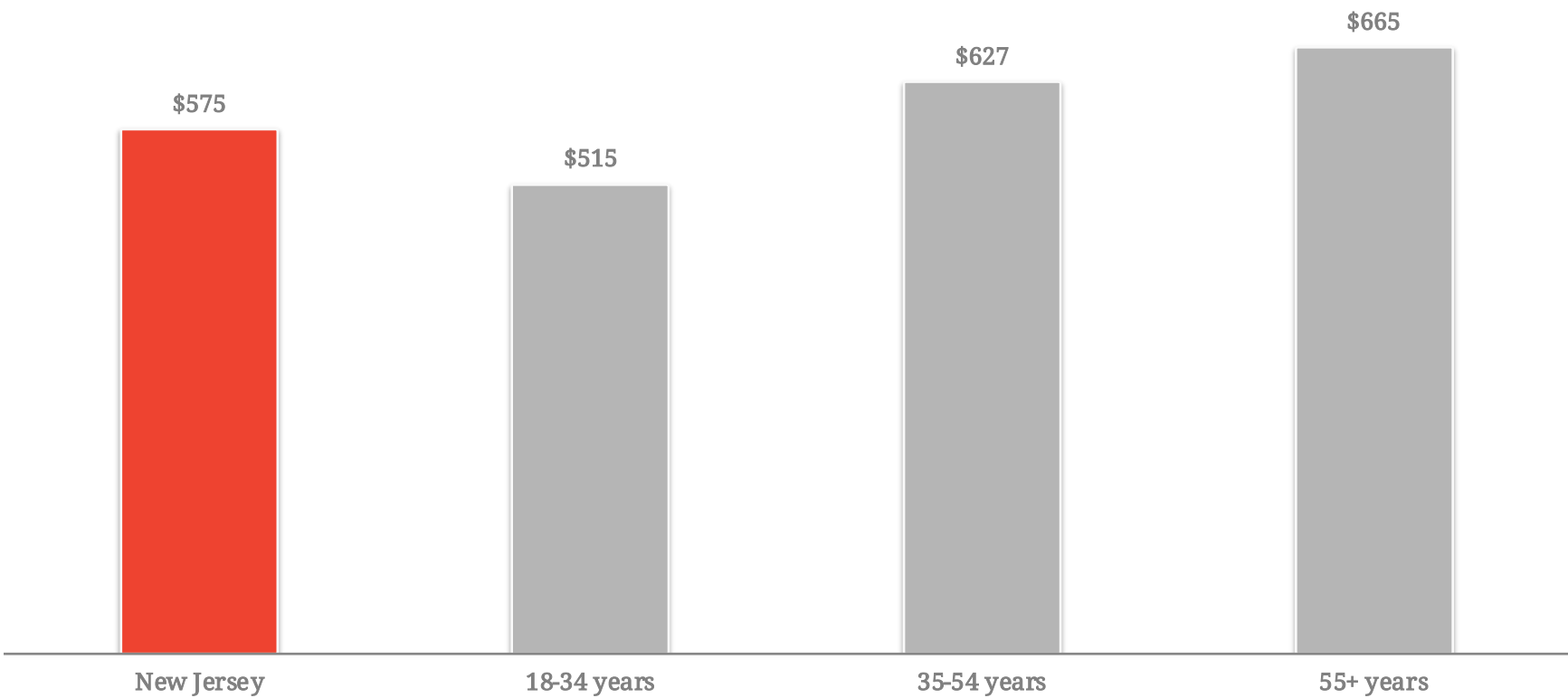


Chart 9 • Segment: 2017-2019 Overnight Leisure Stays (\$) • New Jersey n = 2,826 household count

# New Jersey Age Comparison

DEMOGRAPHICS

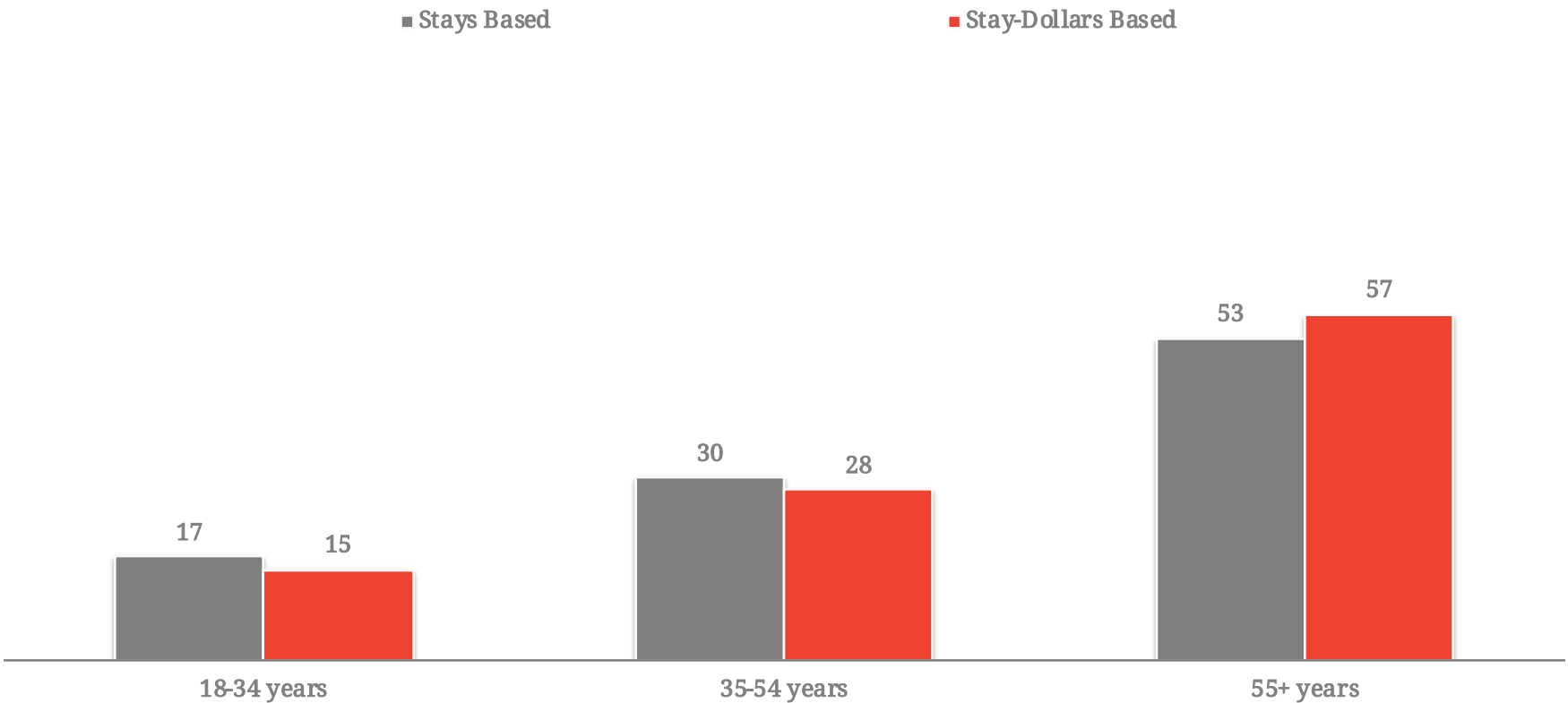


Chart 10 • Segment: 2017-2019 Overnight Leisure (%) • New Jersey n = 3,288 household count

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

DEMOGRAPHICS

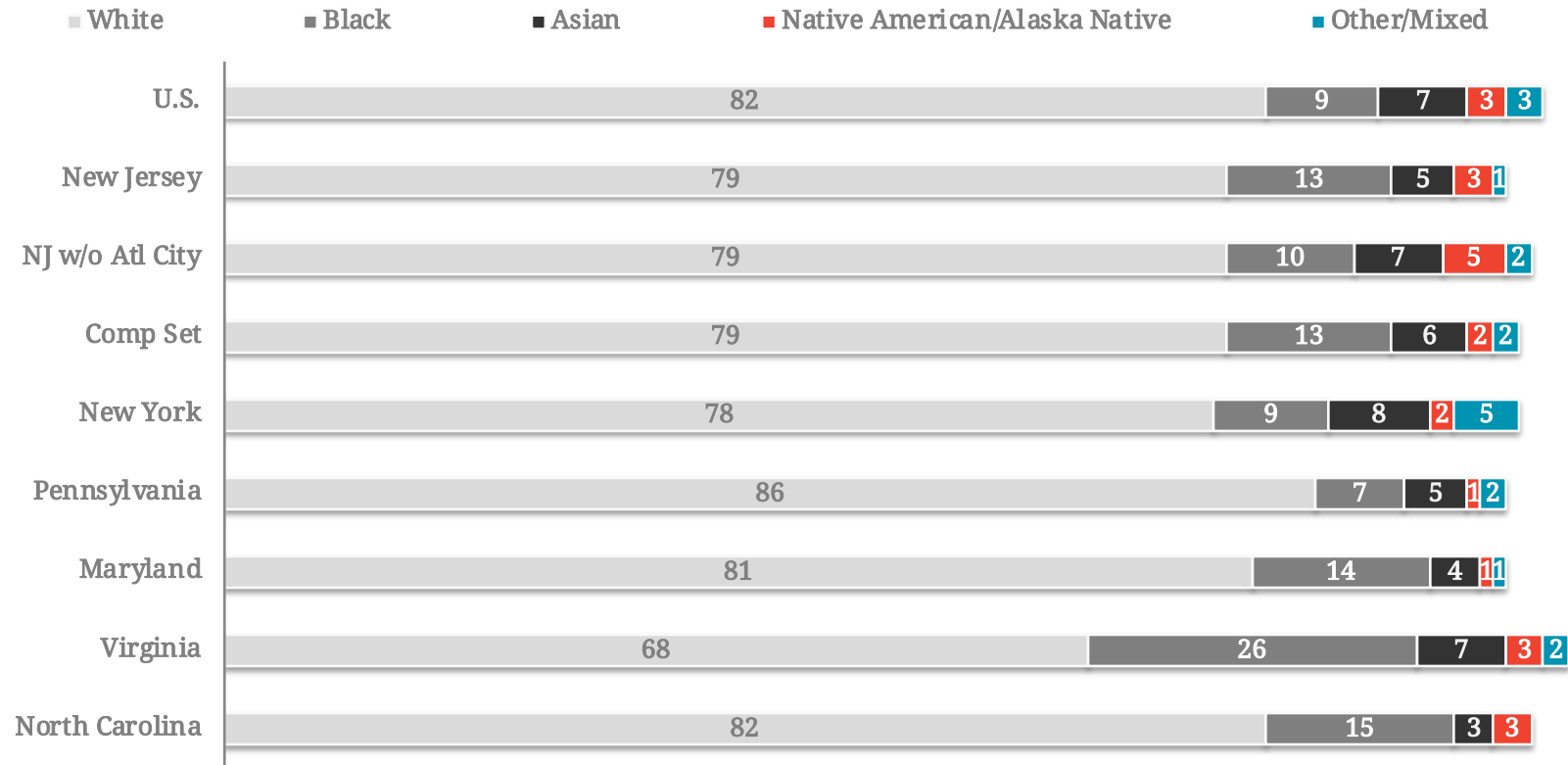


Chart 11 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 932 household count  
 ^Note: The total may add to more than 100% due to multiple responses

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

DEMOGRAPHICS

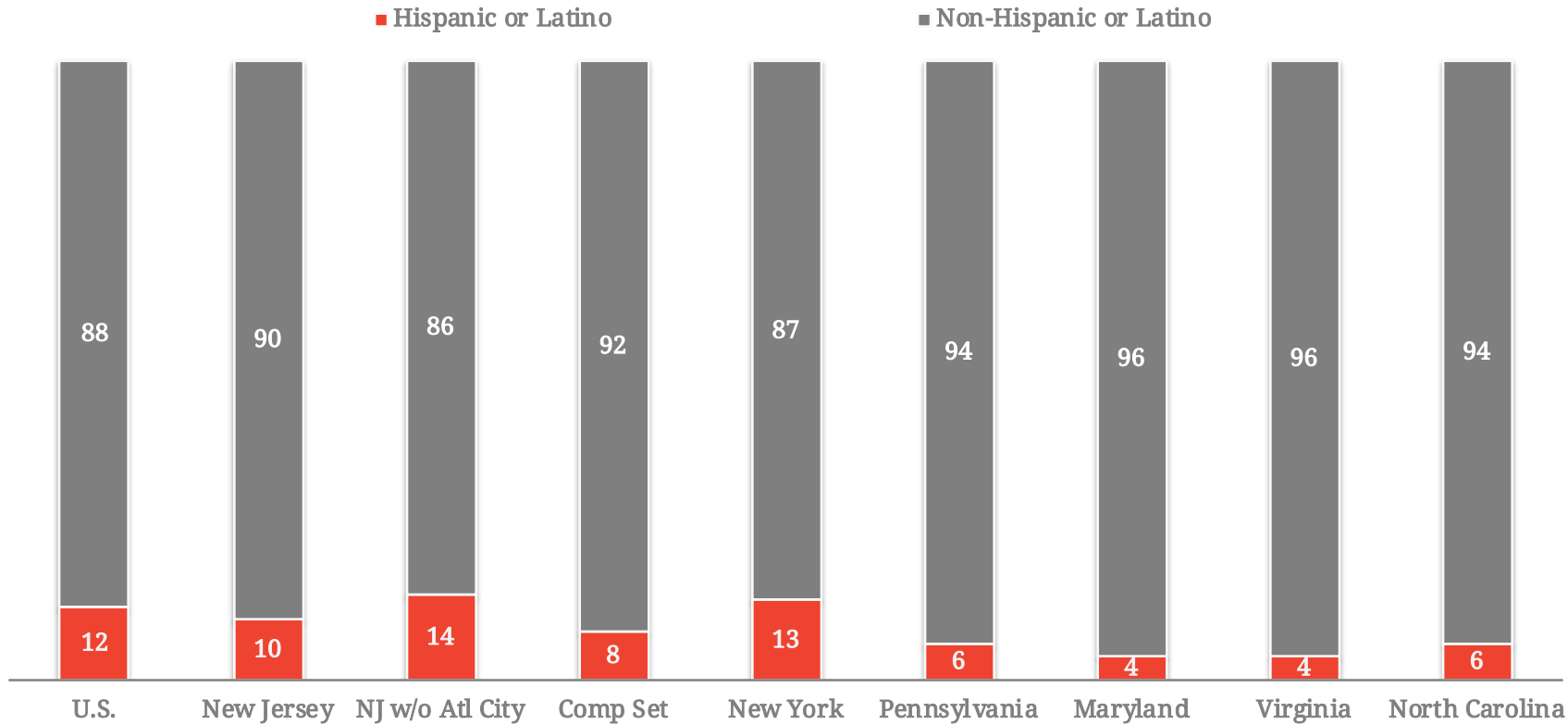


Chart 12 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 932 household count



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

DEMOGRAPHICS

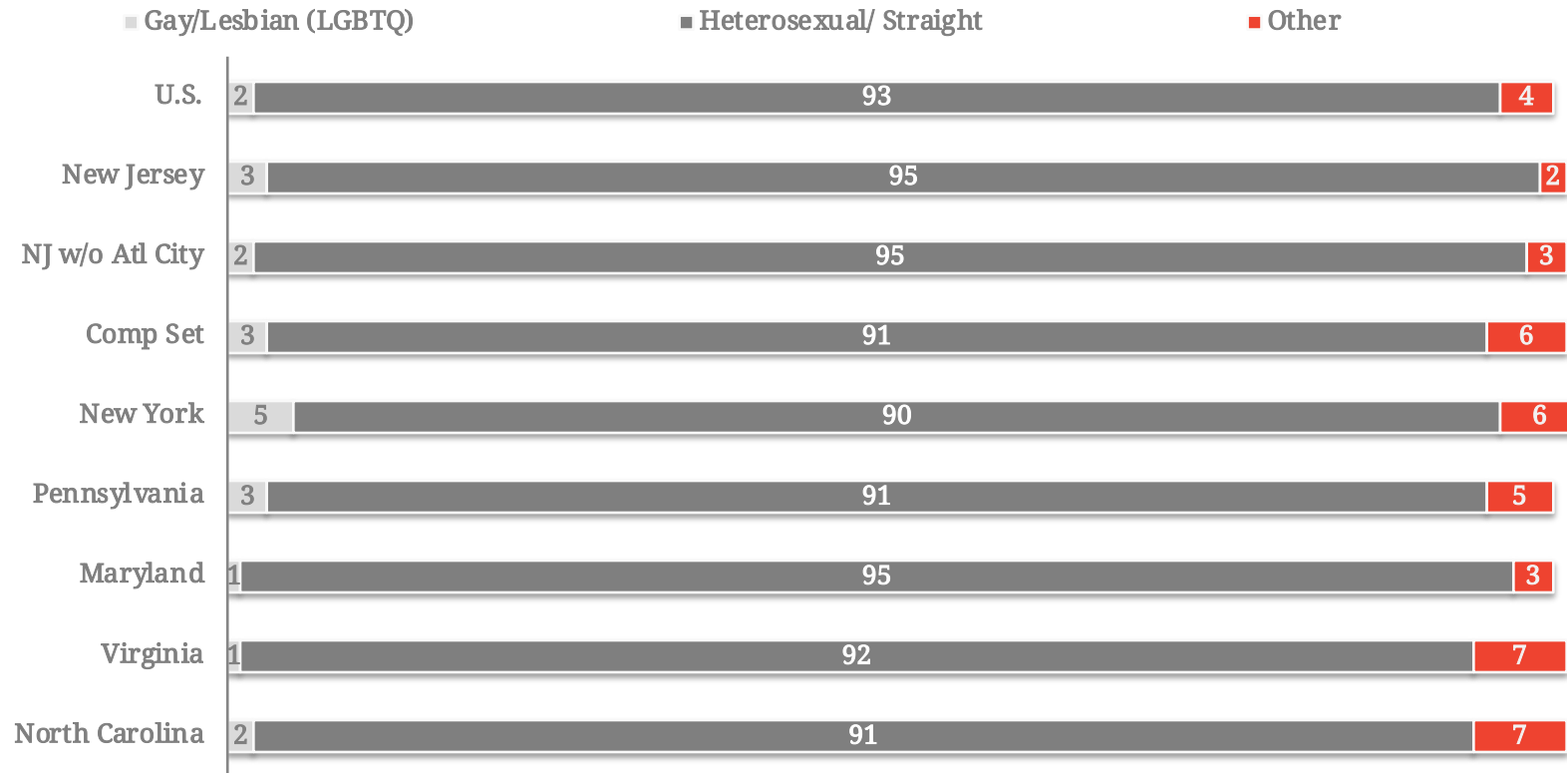


Chart 13 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 932 household count

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

DEMOGRAPHICS

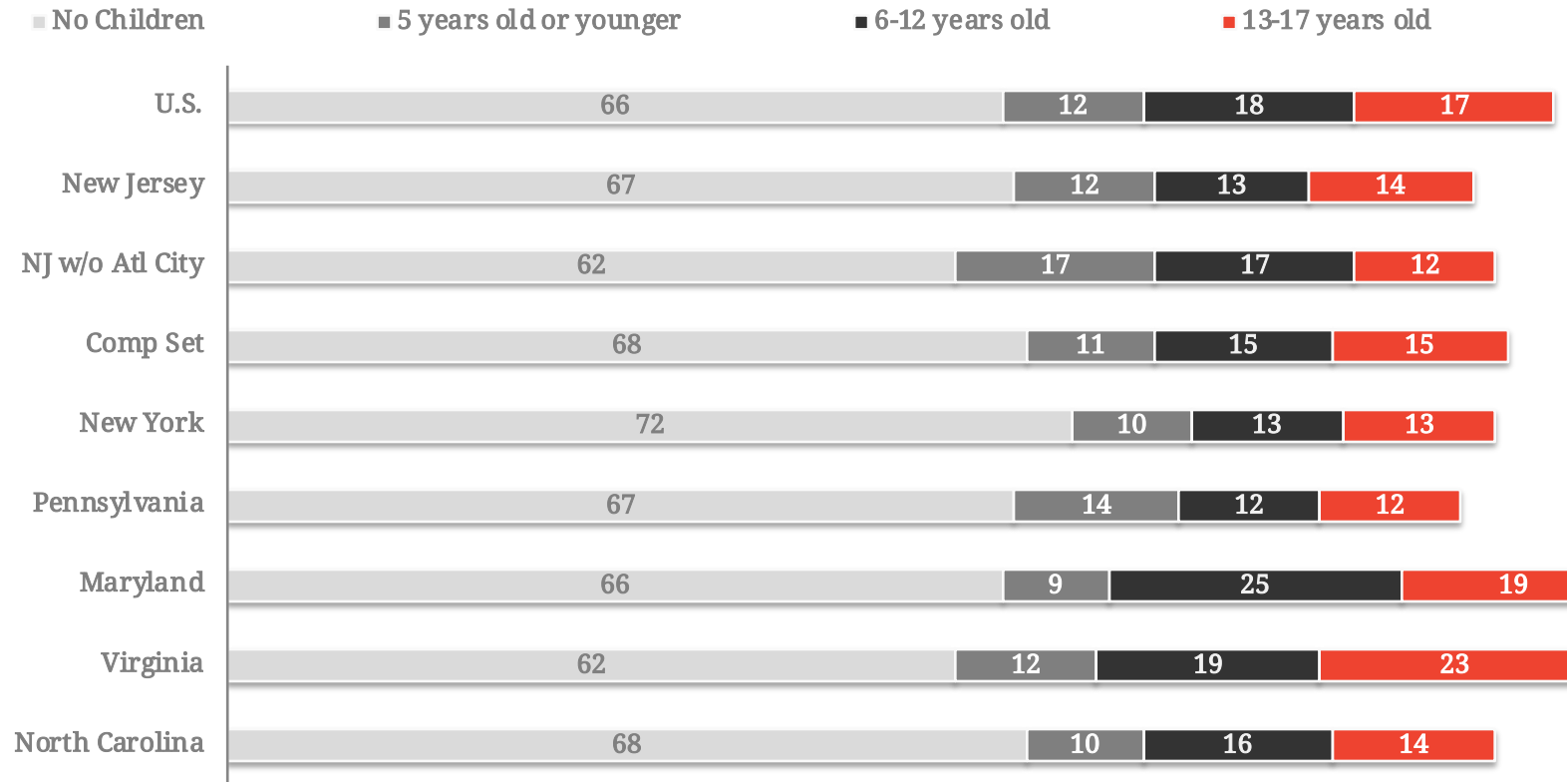


Chart 14 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 932 household count  
^Note: The total may add to more than 100% due to multiple responses

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

DEMOGRAPHICS

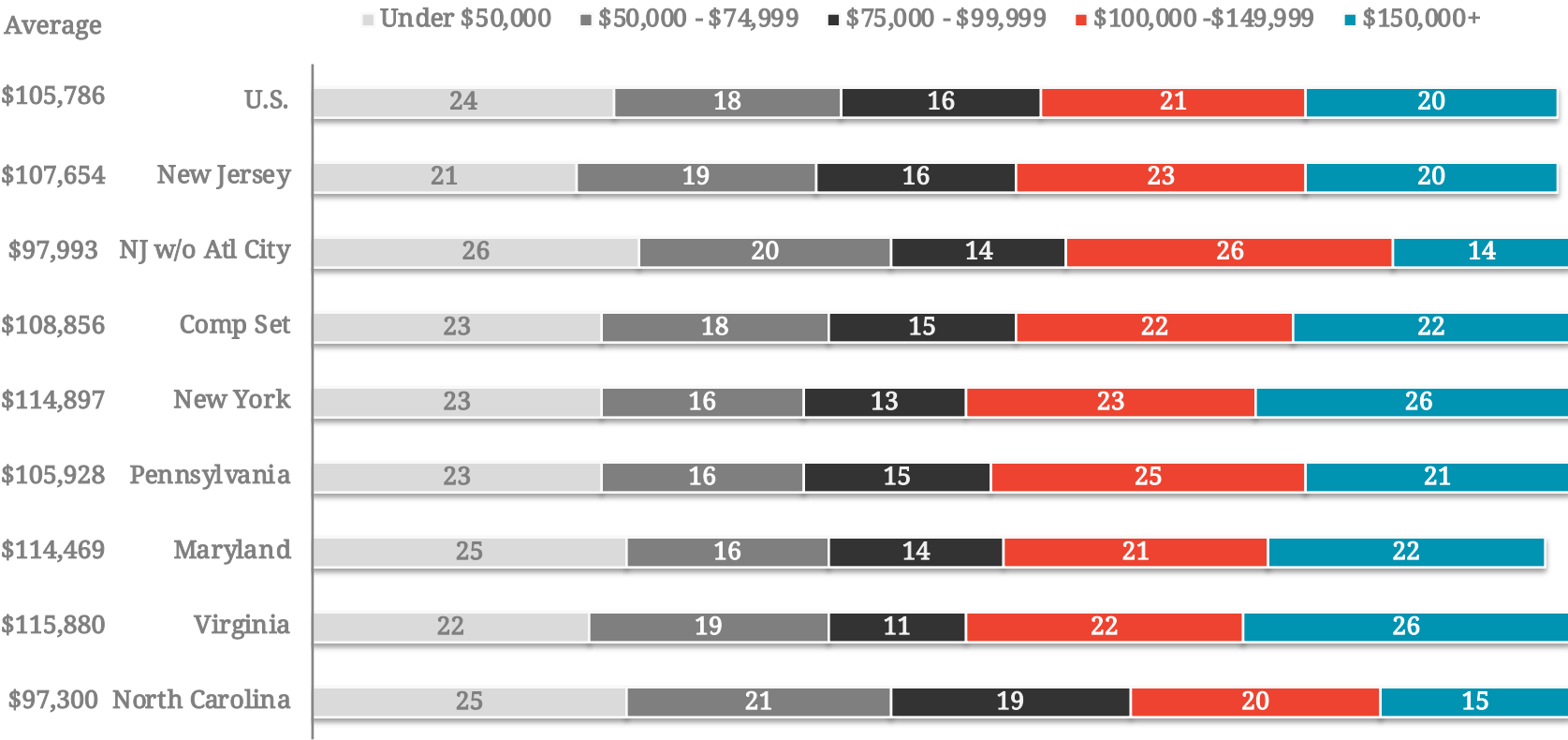


Chart 15 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 932 household count

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

DEMOGRAPHICS

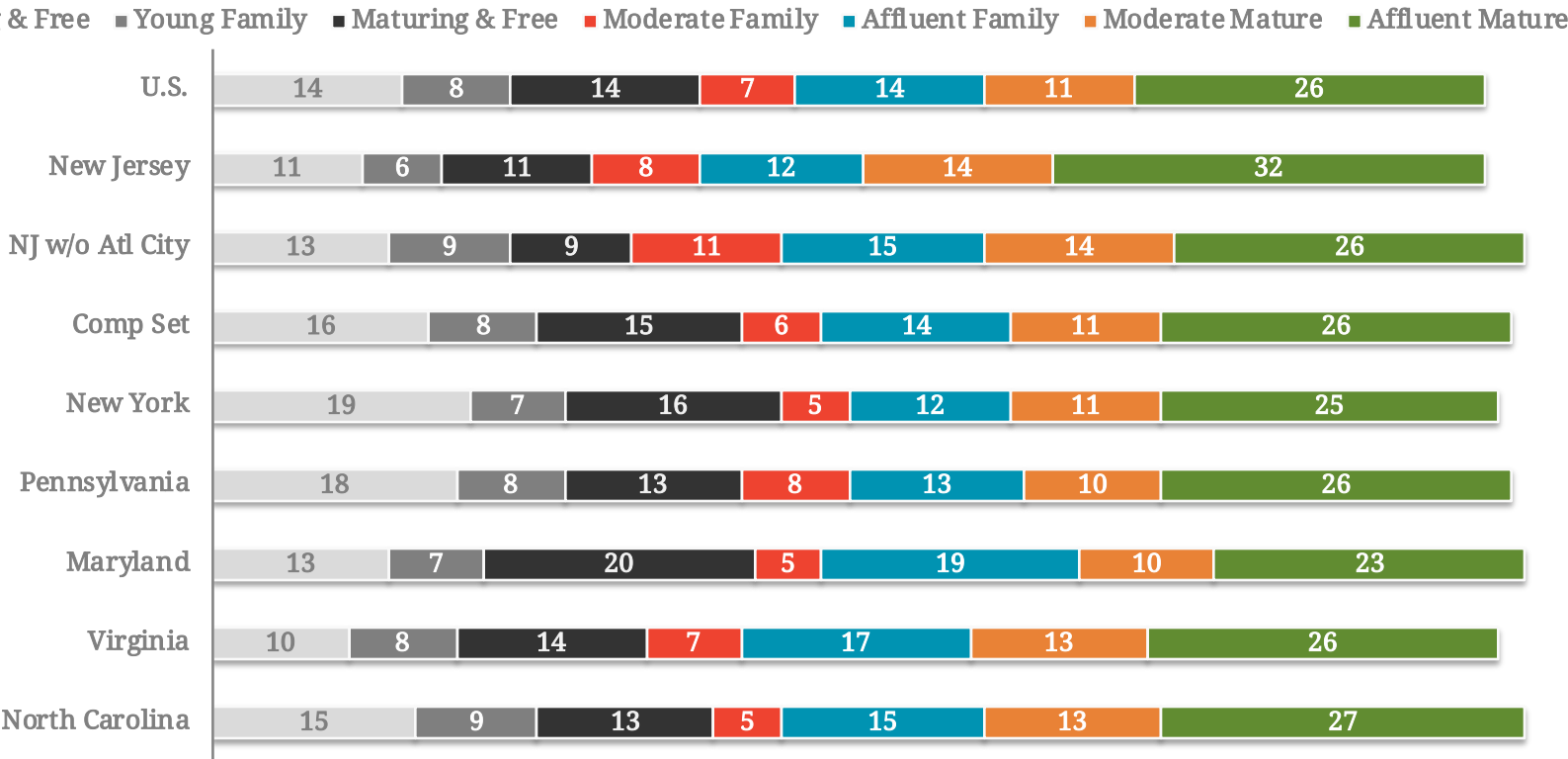


Chart 16 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 932 household count  
 ^Note: The total may add to less than 100% due to non-responses

# New Jersey Avg. Party per Stay Spending by Lifestage

DEMOGRAPHICS

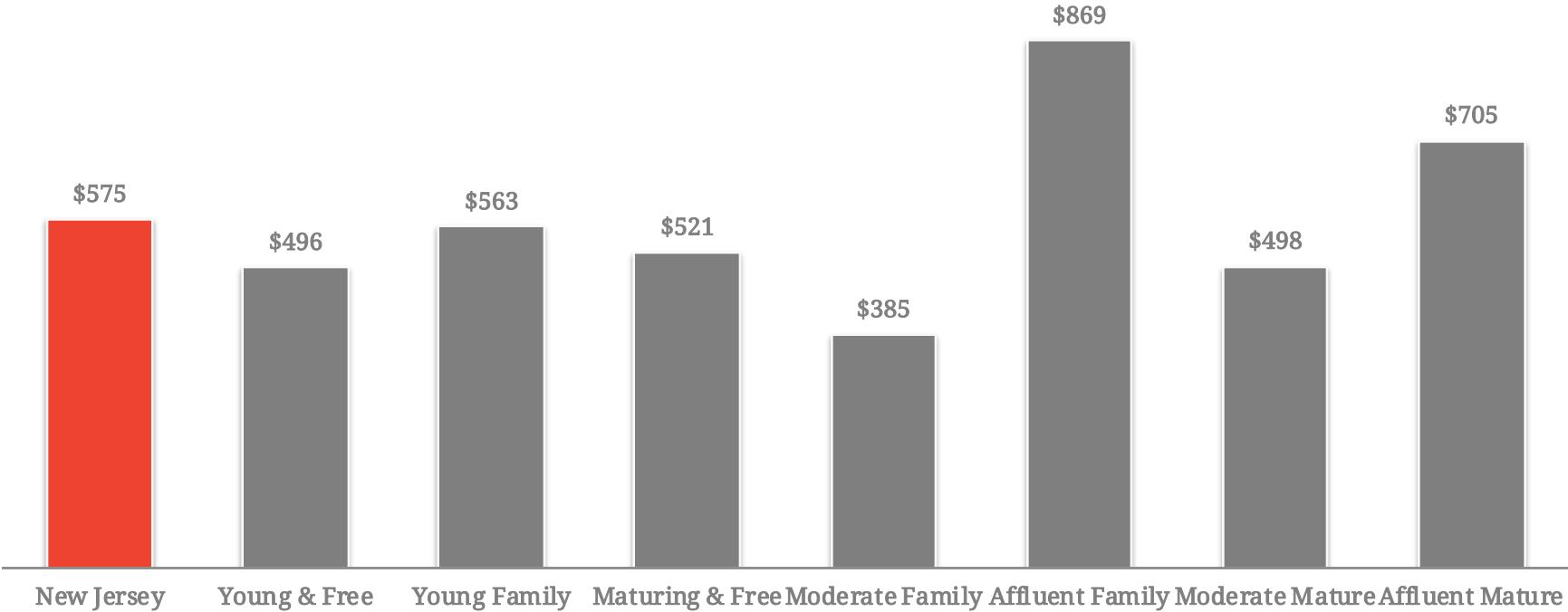


Chart 17 • Segment: 2017-2019 Overnight Leisure Stays (\$) • New Jersey n = 2,827 household count

# New Jersey Lifestage Comparison

DEMOGRAPHICS

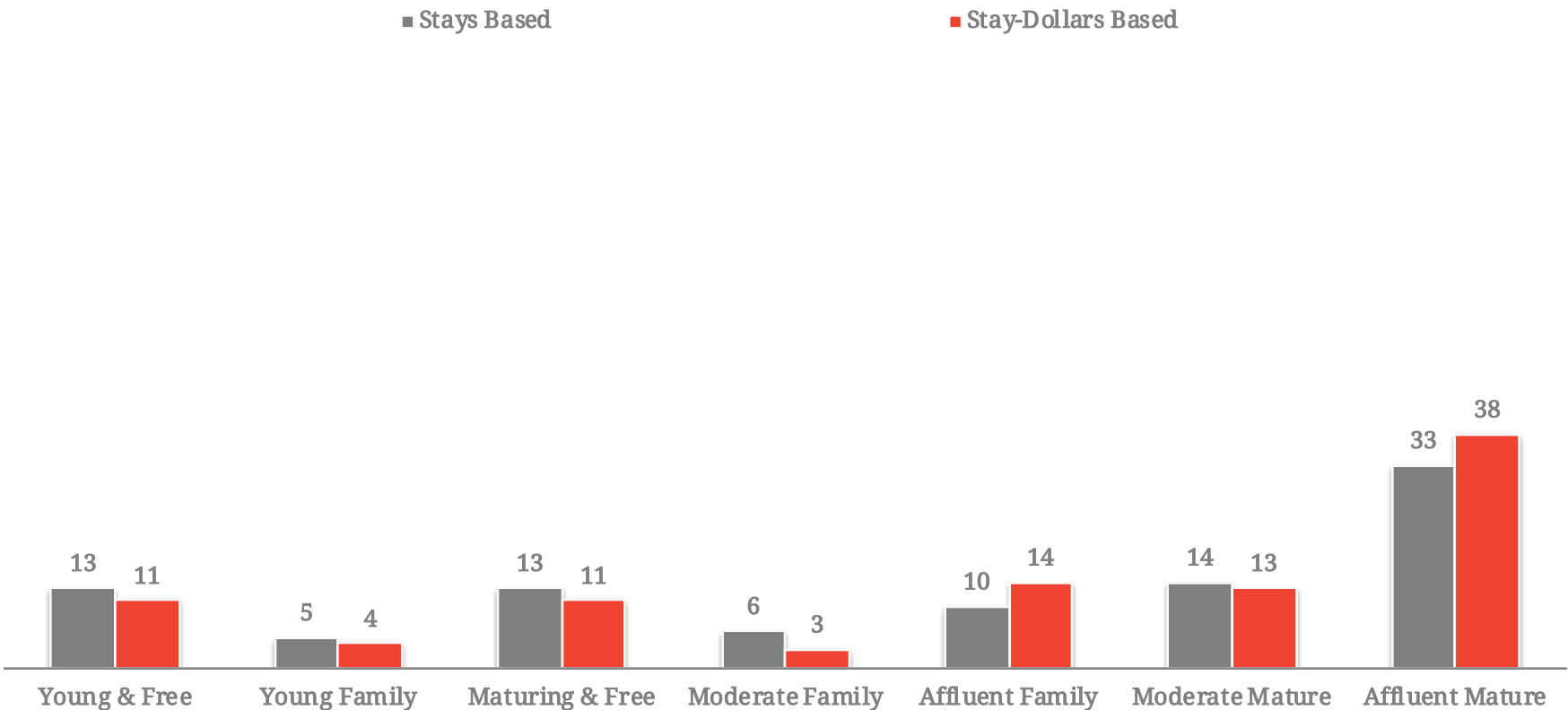


Chart 18 • Segment: 2017-2019 Overnight Leisure (%) • New Jersey n = 3,289 household count

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

DEMOGRAPHICS

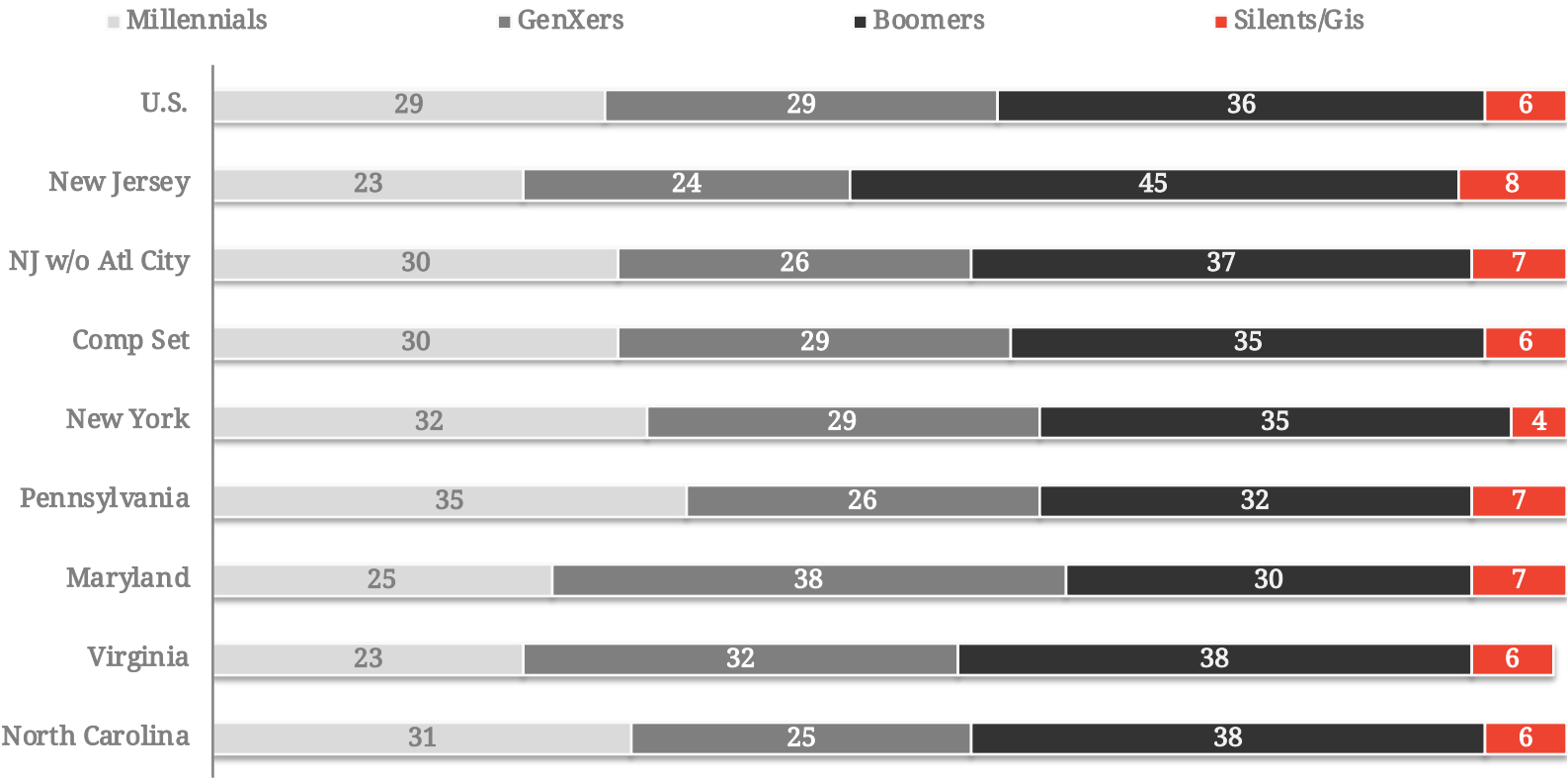


Chart 19 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 932 household count

# New Jersey Avg. Party per Stay Spending by Generation

DEMOGRAPHICS

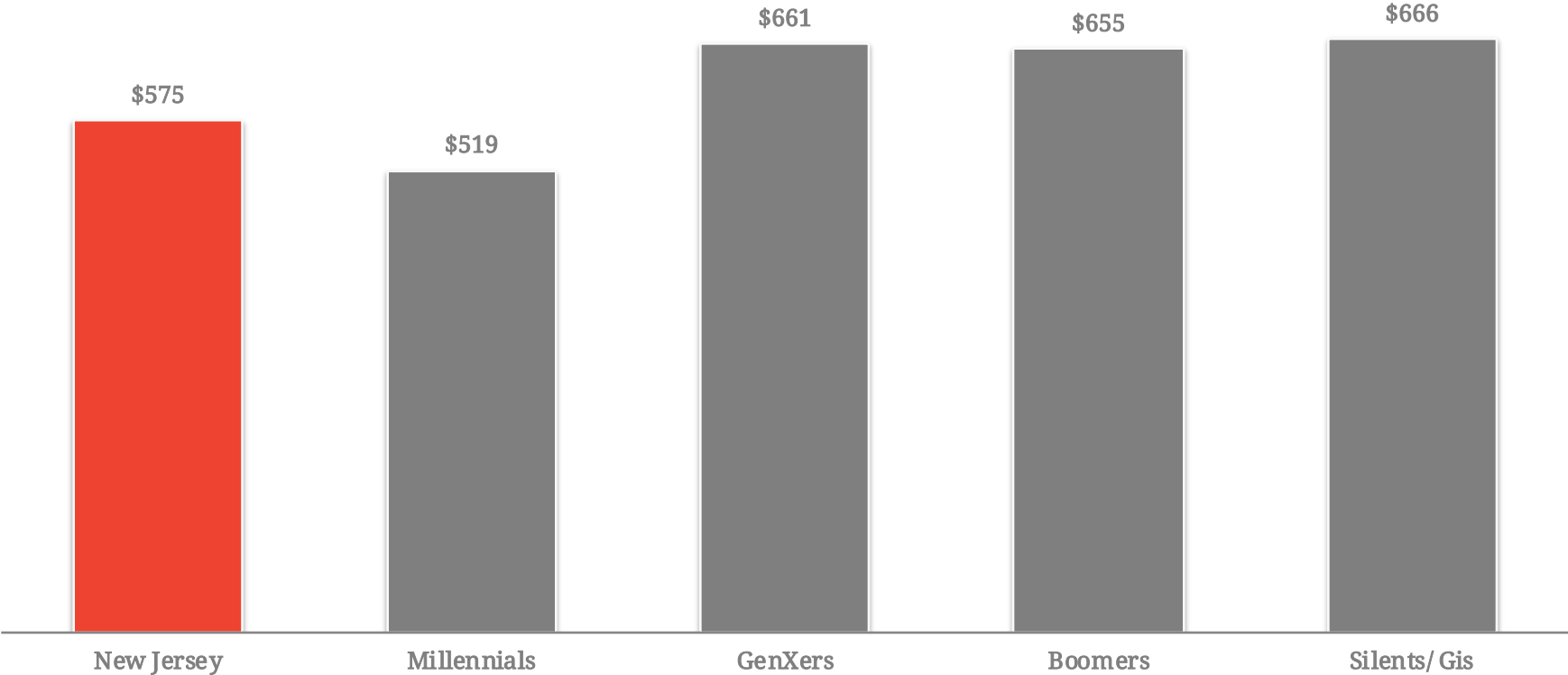


Chart 20 • Segment: 2017-2019 Overnight Leisure Stays (\$) • New Jersey n = 2,826 household count



# New Jersey Traveler Generation Comparison

DEMOGRAPHICS

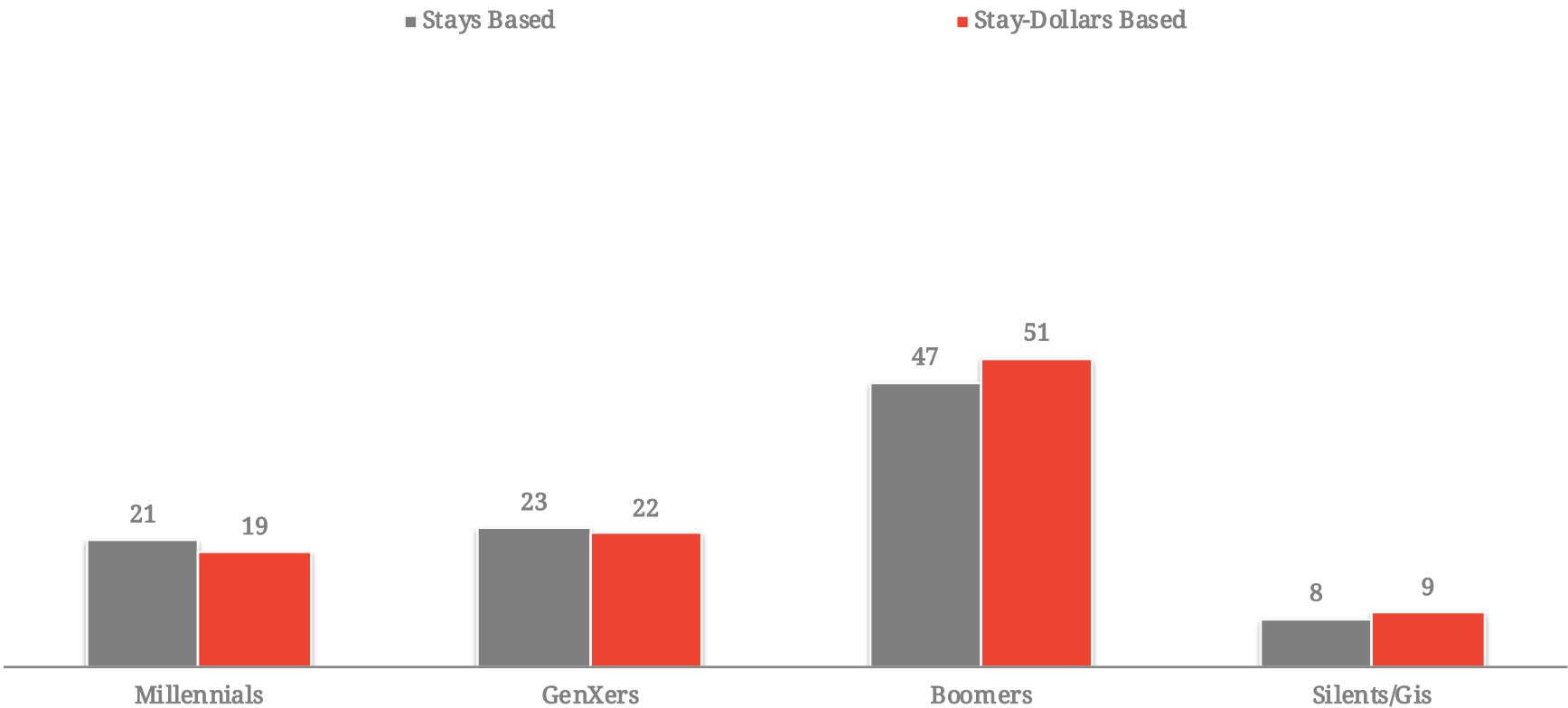
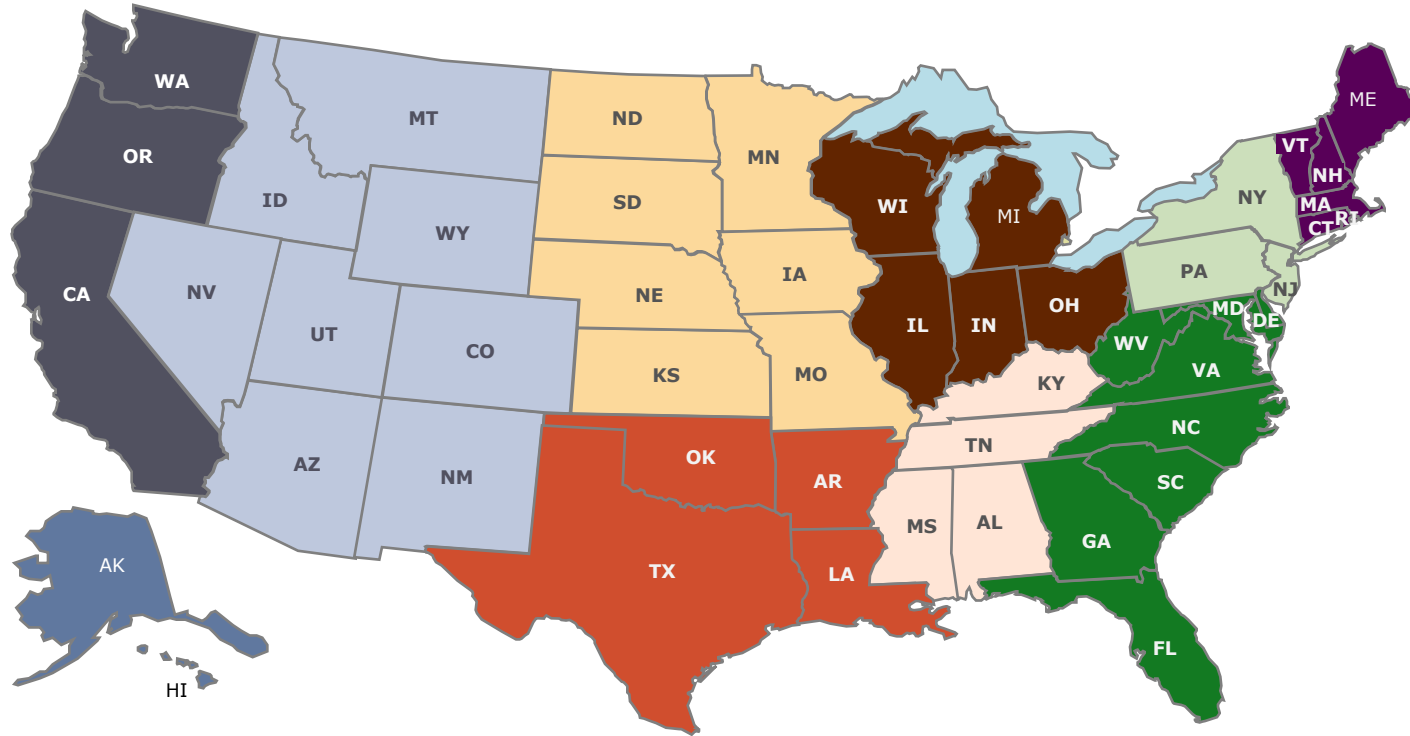


Chart 21 • Segment: 2017-2019 Overnight Leisure (%) • New Jersey n = 3,288 household count

# Origin Divisions for Travel to New Jersey

TRIP ORIGIN



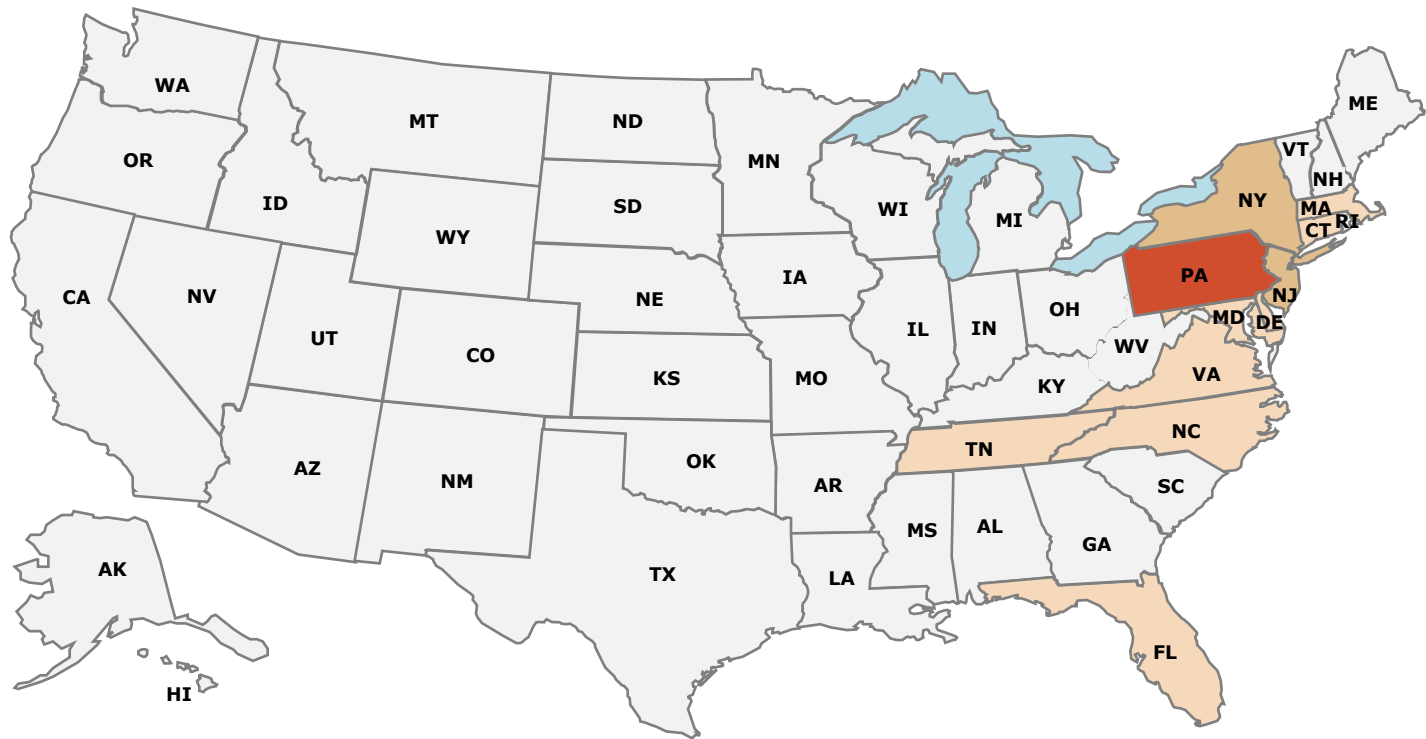
## LEGEND

Pacific	1.1%
Mountain	0.9%
West North Central	1.1%
West South Central	0.7%
East North Central	1.8%
East South Central	1.3%
New England	7.2%
Middle Atlantic	66.8%
South Atlantic	19.1%

Chart 22 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 921 household count

# Top Origin States to New Jersey

TRIP ORIGIN



## LEGEND

25.7% Pennsylvania
25.3% New Jersey
15.9% New York
6.8% Florida
4.2% Massachusetts
4.2% Maryland
2.9% Virginia
2.3% North Carolina
2.0% Connecticut
1.2% Delaware
1.2% Tennessee

Chart 23 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 921 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	5.3%	29.9%	19.1%	12.5%	19.4%	16.2%	10.0%	5.9%	5.3%
Philadelphia, PA	2.5%	26.1%	26.3%	6.7%	4.2%	13.8%	8.0%	5.7%	2.6%
Orlando-Daytona Beach-Melbourne, FL	1.9%	4.5%	6.8%	1.5%	2.4%	0.7%	1.3%	1.1%	1.7%
Boston, MA	2.1%	4.5%	5.8%	2.8%	6.1%	1.4%	1.6%	1.1%	1.7%
Washington, DC (Hagerstown, MD)	2.4%	3.9%	4.6%	7.1%	2.8%	7.2%	11.8%	17.3%	3.7%
Wilkes Barre-Scranton, PA	0.4%	3.4%	4.6%	1.3%	1.7%	2.3%	0.6%	0.7%	0.2%
Albany-Schenectady-Troy, NY	0.6%	3.3%	2.2%	1.7%	4.2%	0.9%	1.3%	0.3%	0.5%
Baltimore, MD	1.3%	2.7%	2.3%	4.6%	3.3%	3.6%	20.8%	4.2%	2.0%
Harrisburg-Lancaster-Lebanon-York, PA	0.4%	2.6%	3.6%	1.3%	0.4%	2.8%	1.2%	2.4%	0.2%
Hartford & New Haven, CT	0.6%	1.4%	1.6%	0.8%	1.9%	0.6%	0.2%	0.3%	0.3%
Top 10 Sum	17.5%	82.3%	76.9%	40.3%	46.4%	49.5%	56.8%	39.0%	18.2%

# New Jersey Avg. Party per Stay Spending by Origin DMA

TRIP ORIGIN

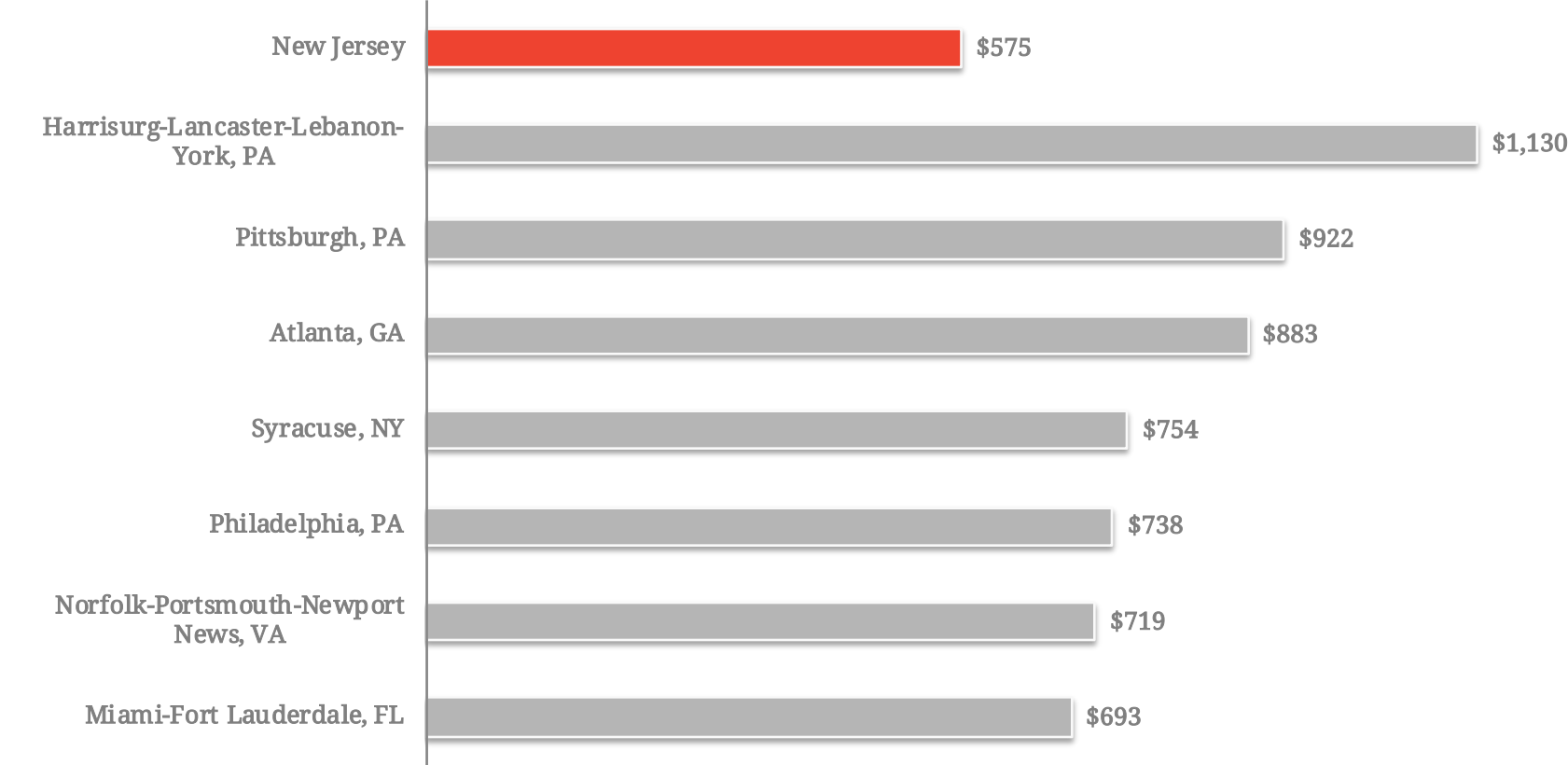


Chart 25 • Segment: 2017-2019 Overnight Leisure Stays (\$) • New Jersey n = 2,793 household count

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

TRIP ORIGIN

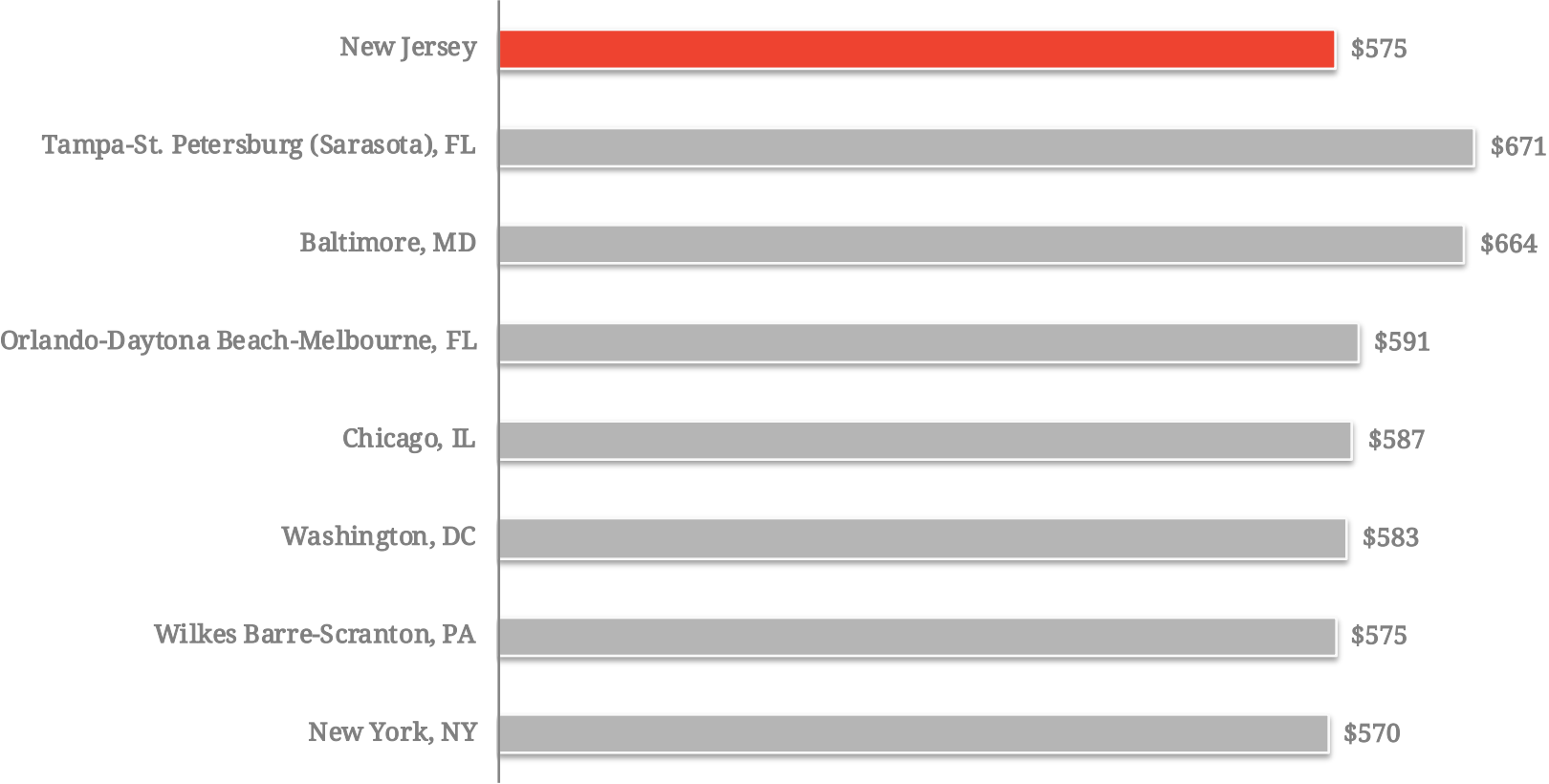


Chart 26 • Segment: 2017-2019 Overnight Leisure Stays (\$) • New Jersey n = 2,793 household count

# New Jersey Origin DMA Comparison

TRIP ORIGIN

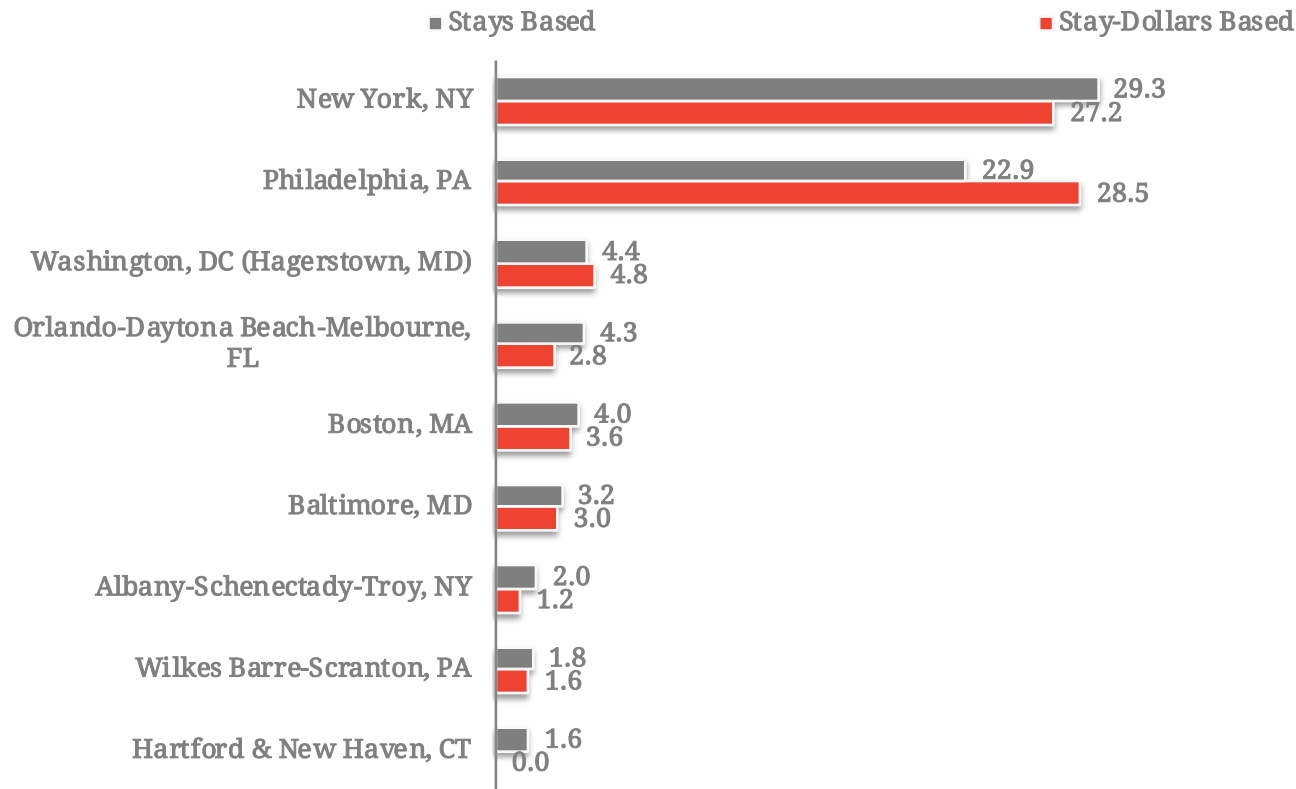


Chart 27 • Segment: 2017-2019 Overnight Leisure (%) • New Jersey n = 3,251 household count

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

TRANSPORTATION



Chart 28 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 932 household count



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

TRANSPORTATION

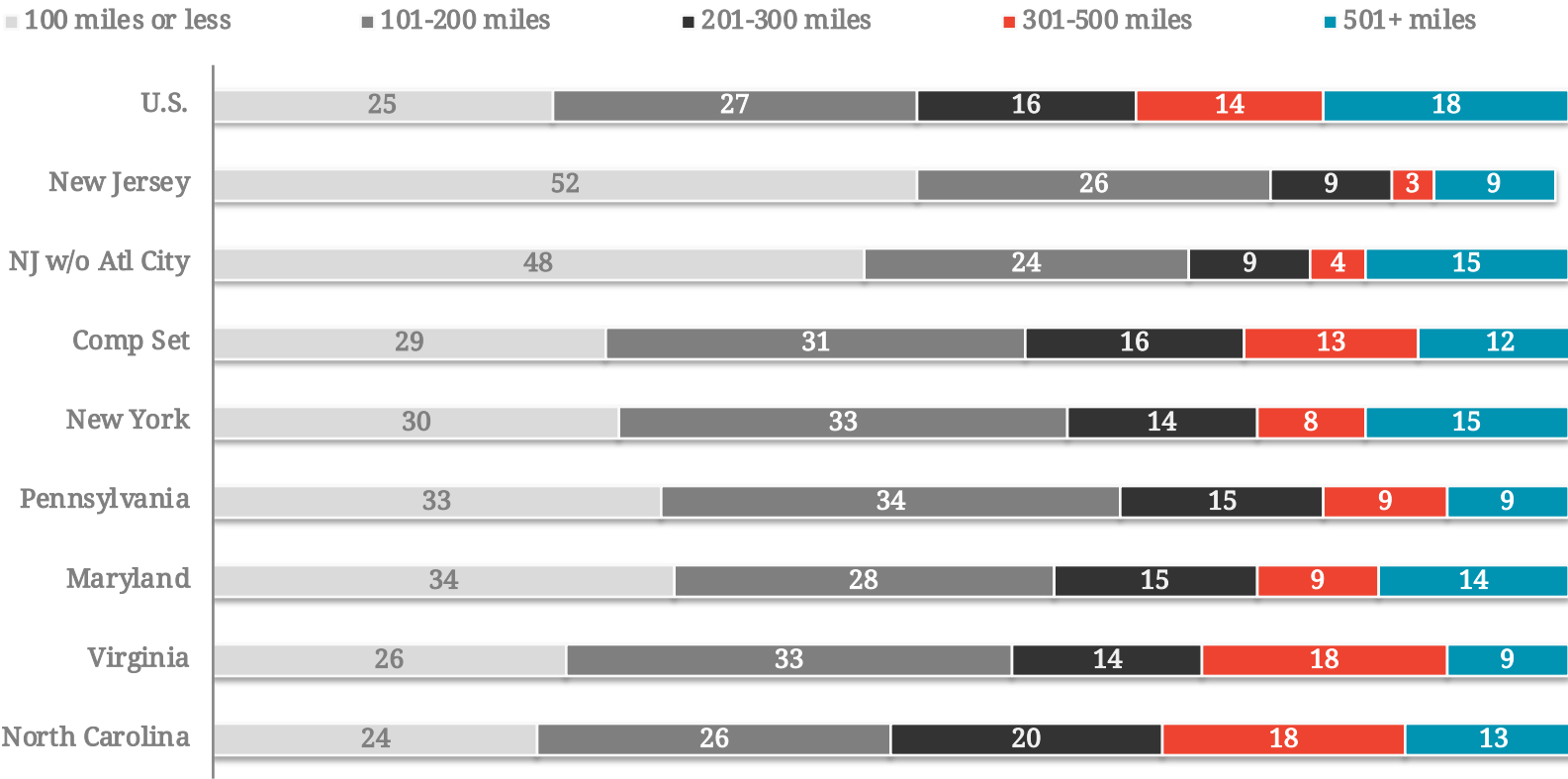


Chart 29 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 732 household count

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

TRANSPORTATION

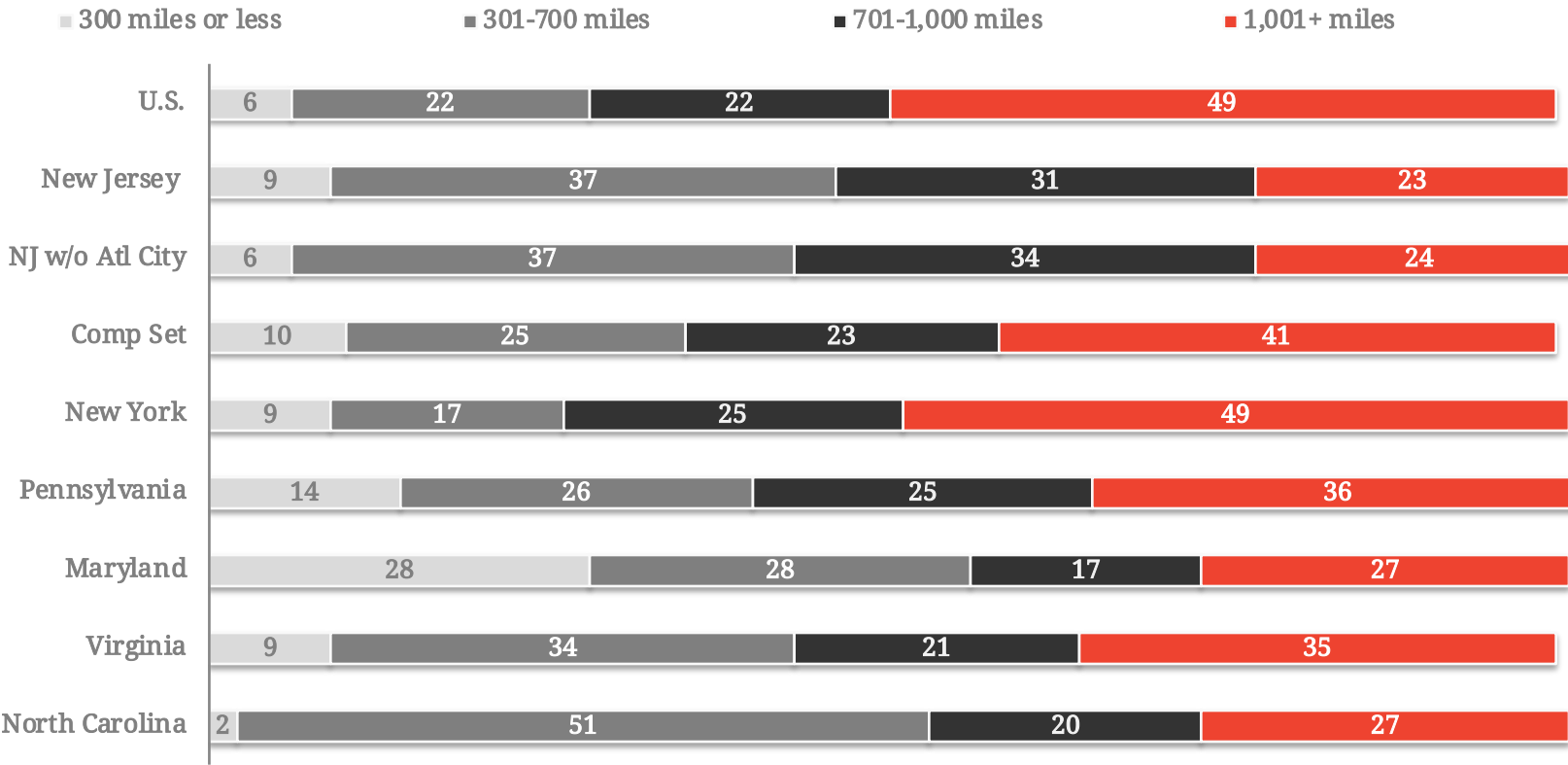


Chart 30 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 145 household count

# New Jersey Month Trip Started

TRIP TIMING

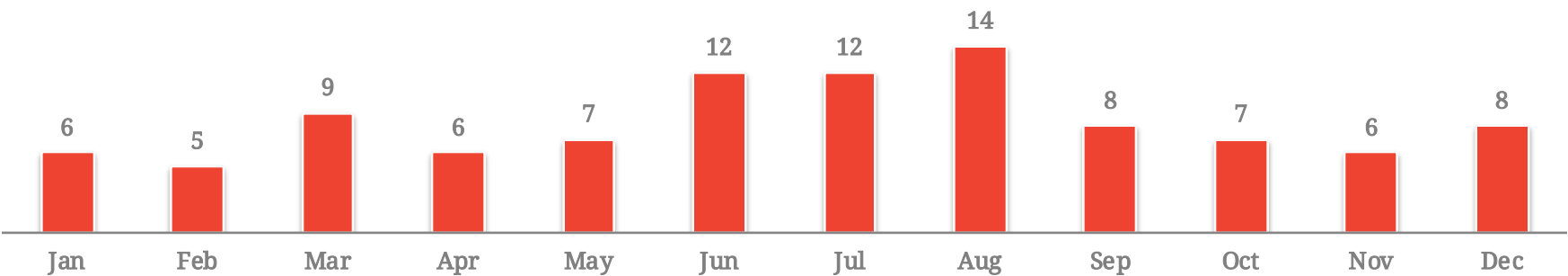


Chart 31 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 932 household count

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

TRIP TIMING

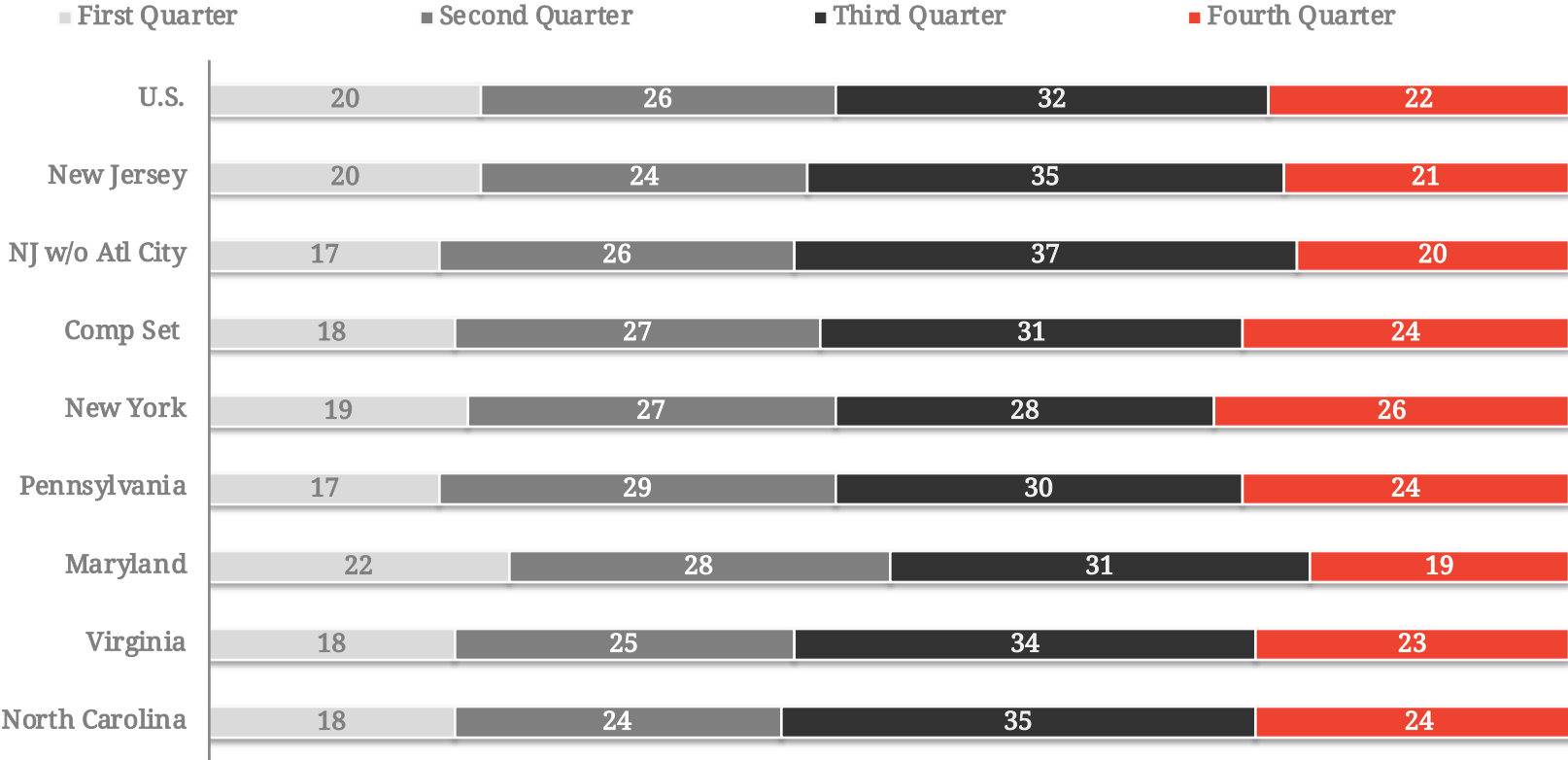


Chart 32 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 932 household count

# New Jersey Avg. Party per Stay Spending by Quarter

TRIP TIMING

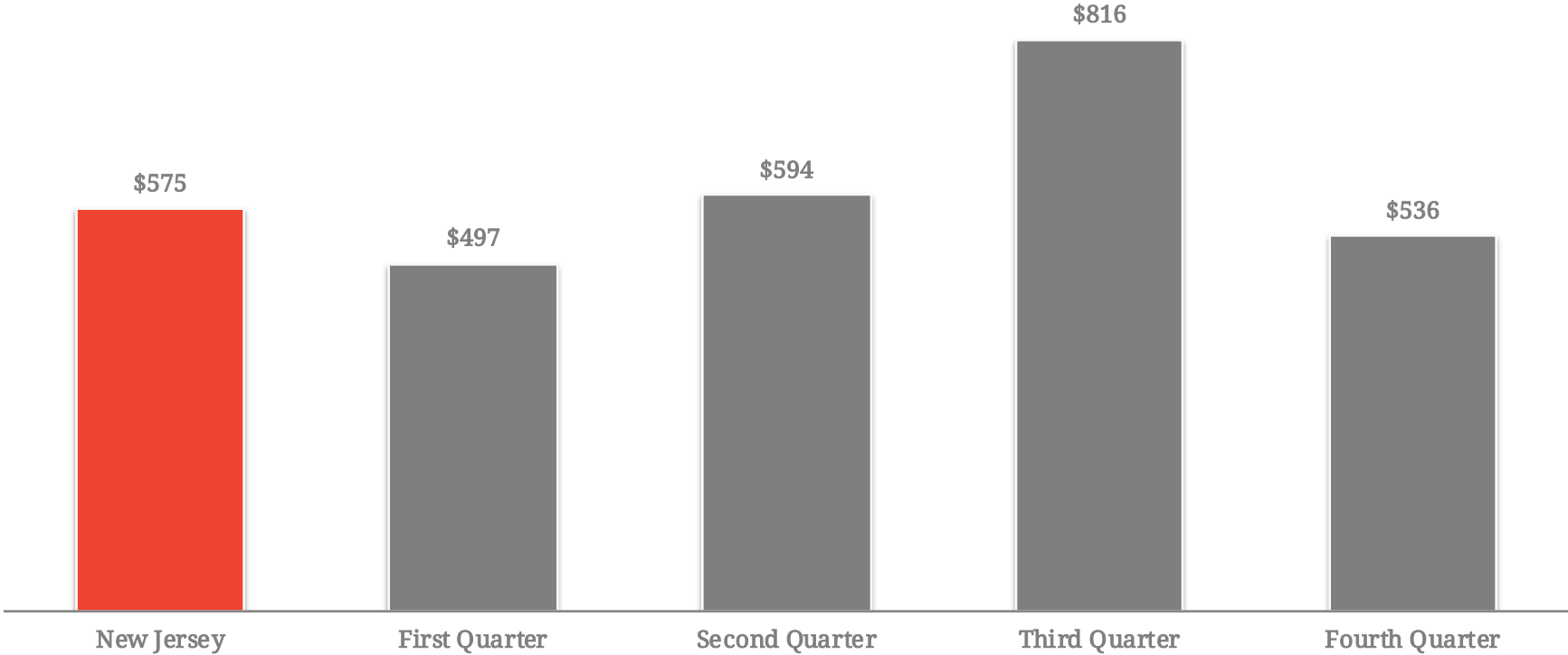


Chart 33 • Segment: 2017-2019 Overnight Leisure Stays (\$) • New Jersey n = 2,827 household count

# New Jersey Trip Timing Comparison by Quarter

TRIP TIMING

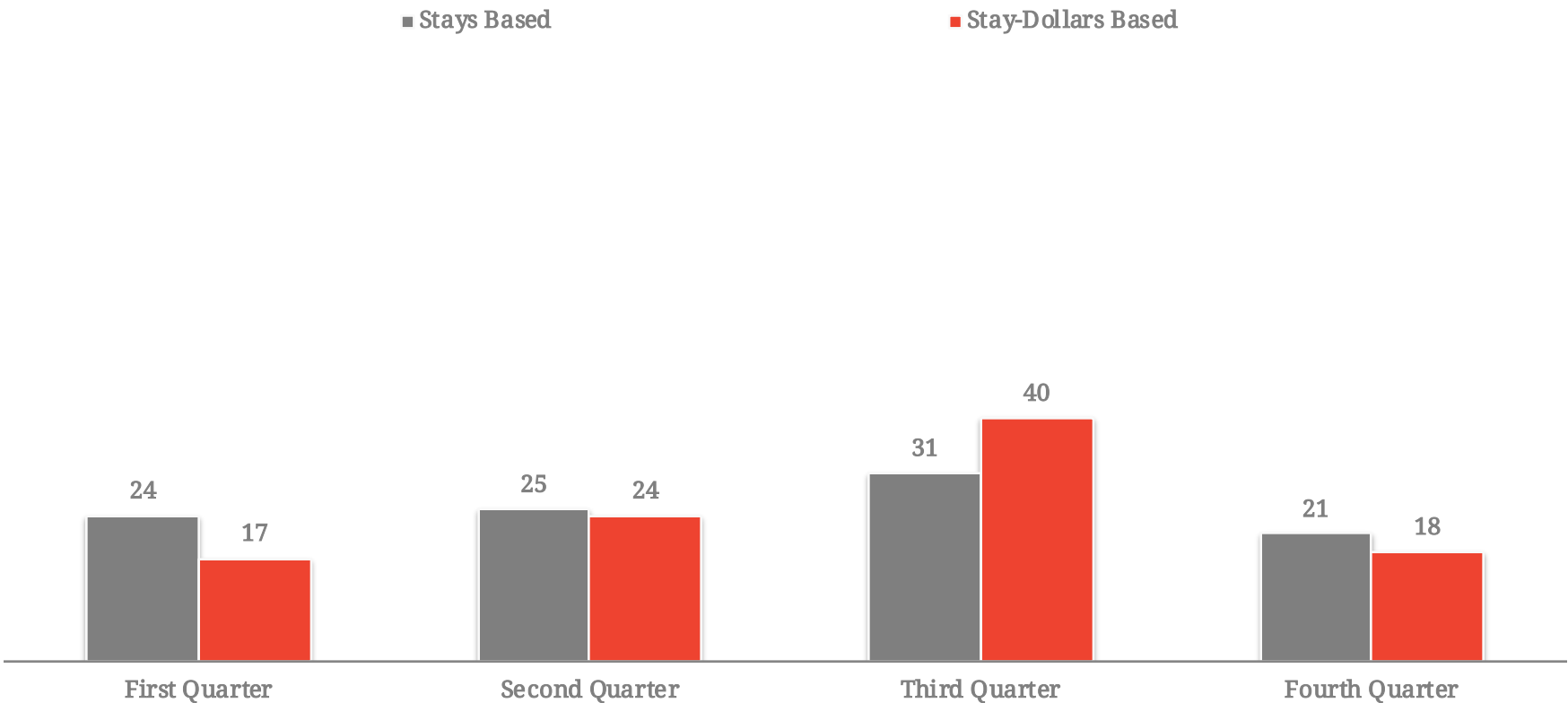


Chart 34 • Segment: 2017-2019 Overnight Leisure (%) • New Jersey n = 3,289 household count

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

TRIP TIMING

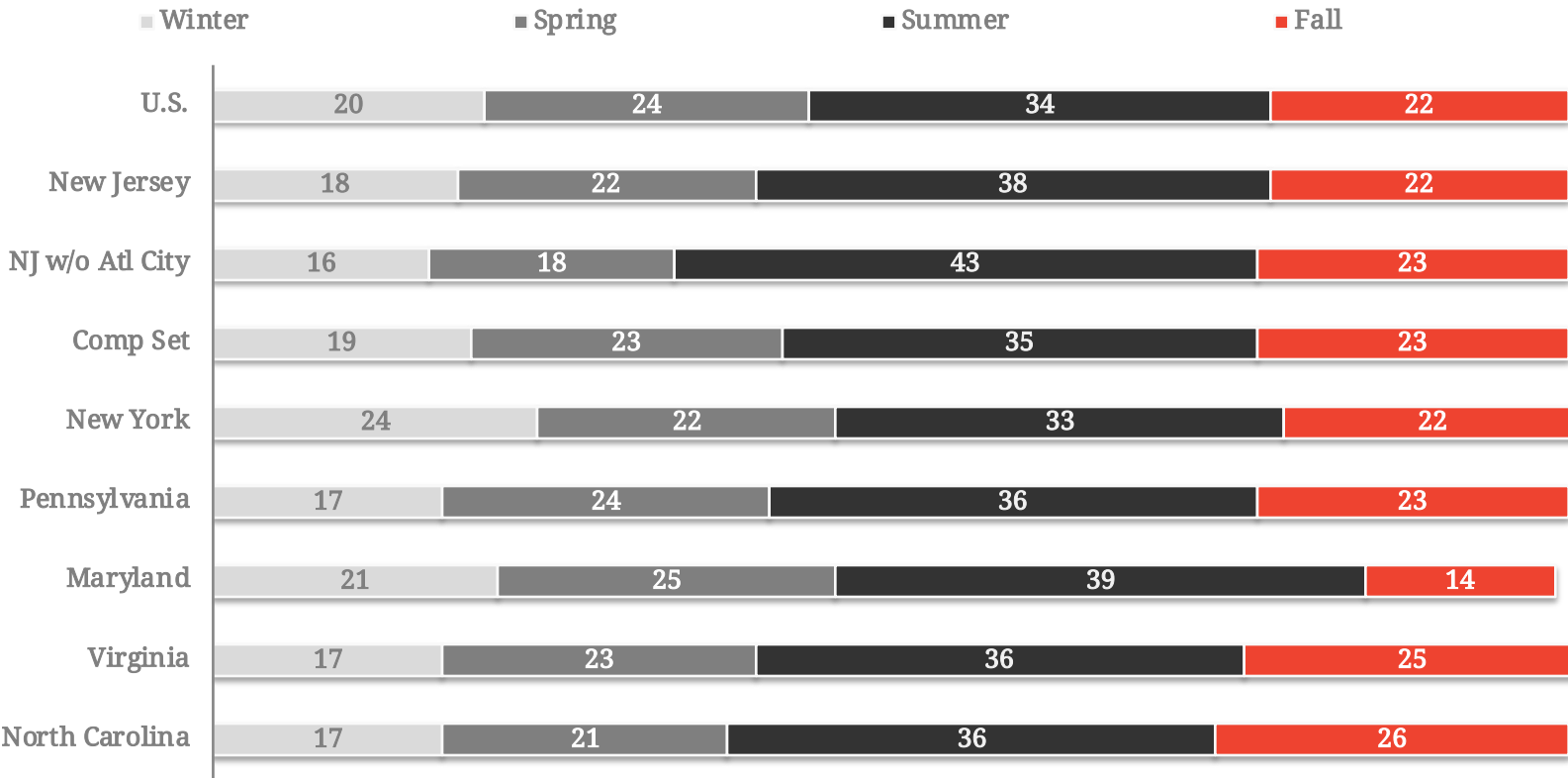


Chart 35 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 932 household count

# New Jersey Avg. Party per Stay Spending by Season

TRIP TIMING

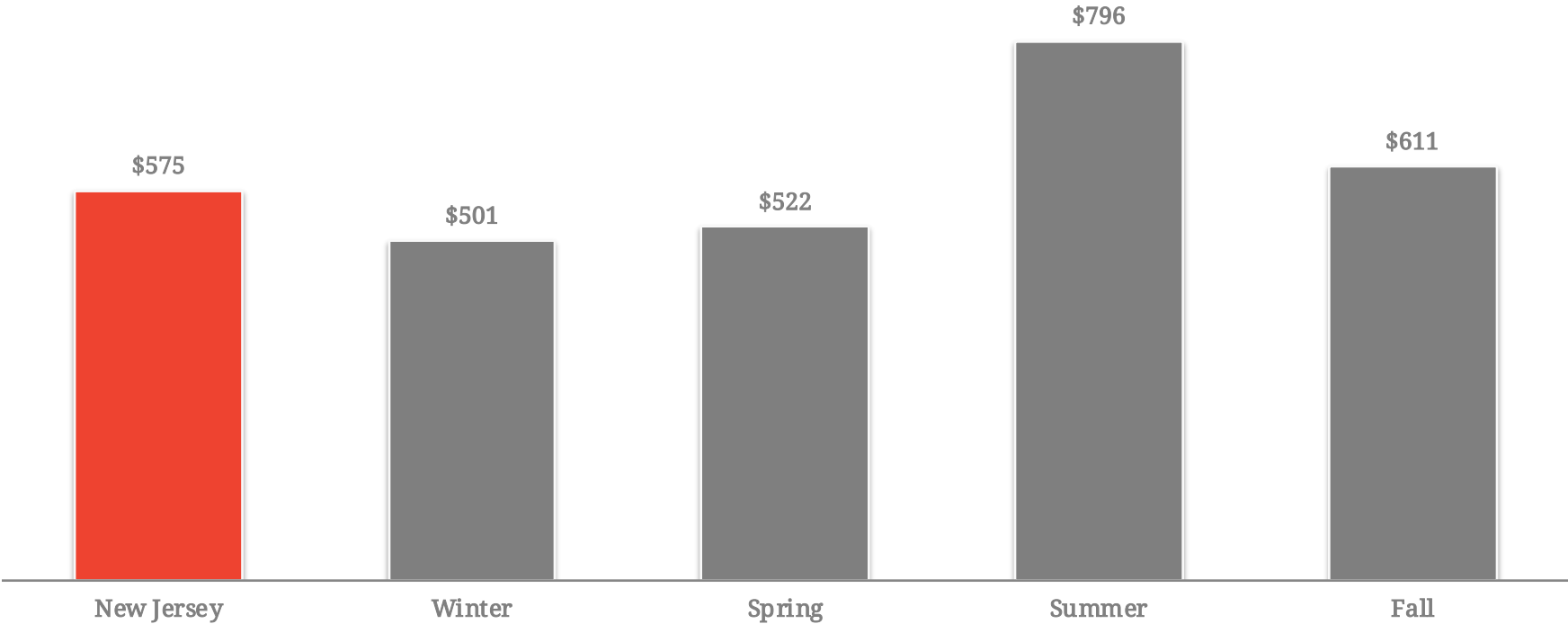


Chart 36 • Segment: 2017-2019 Overnight Leisure Stays (\$) • New Jersey n = 2,827 household count



# New Jersey Trip Timing Comparison by Season

TRIP TIMING

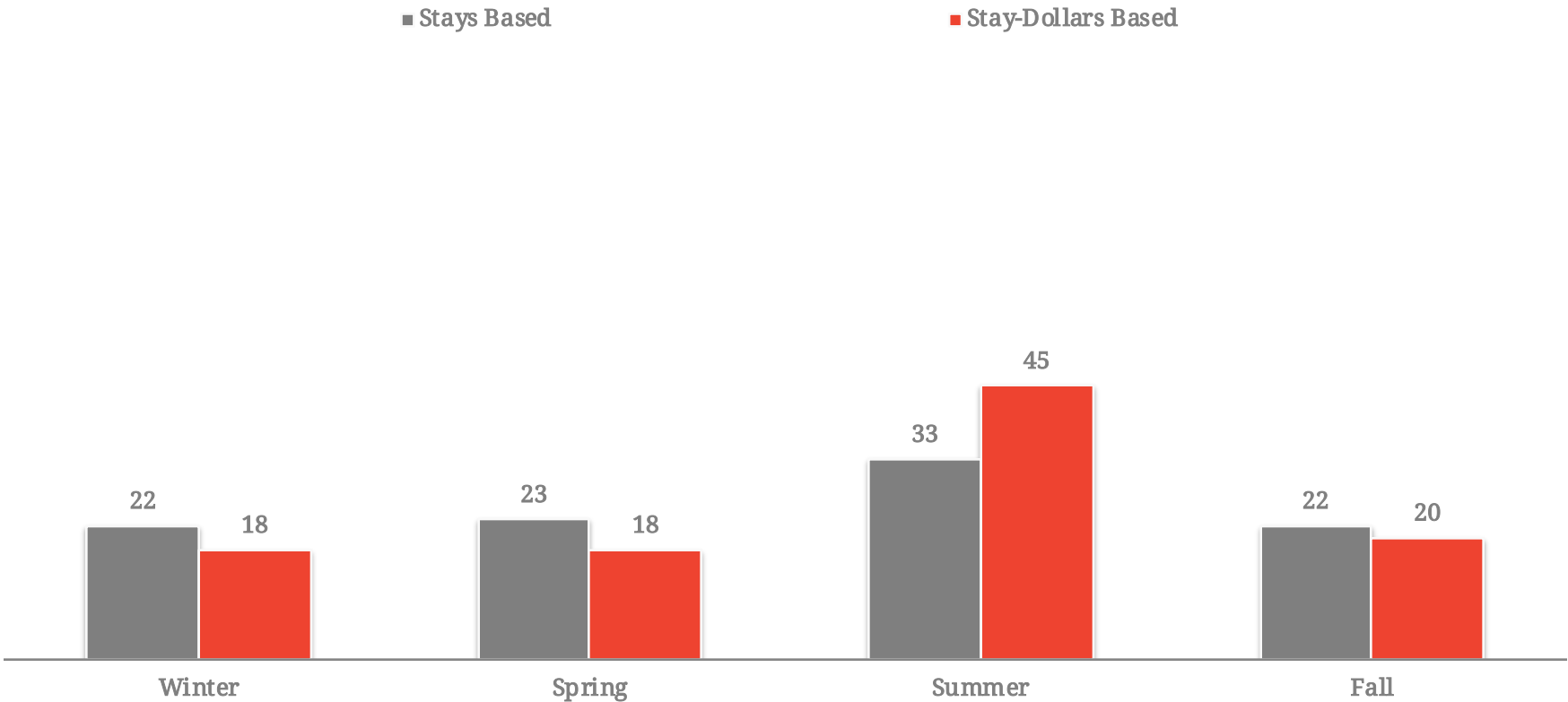


Chart 37 • Segment: 2017-2019 Overnight Leisure (%) • New Jersey n = 3,289 household count

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

TRIP CHARACTERISTICS

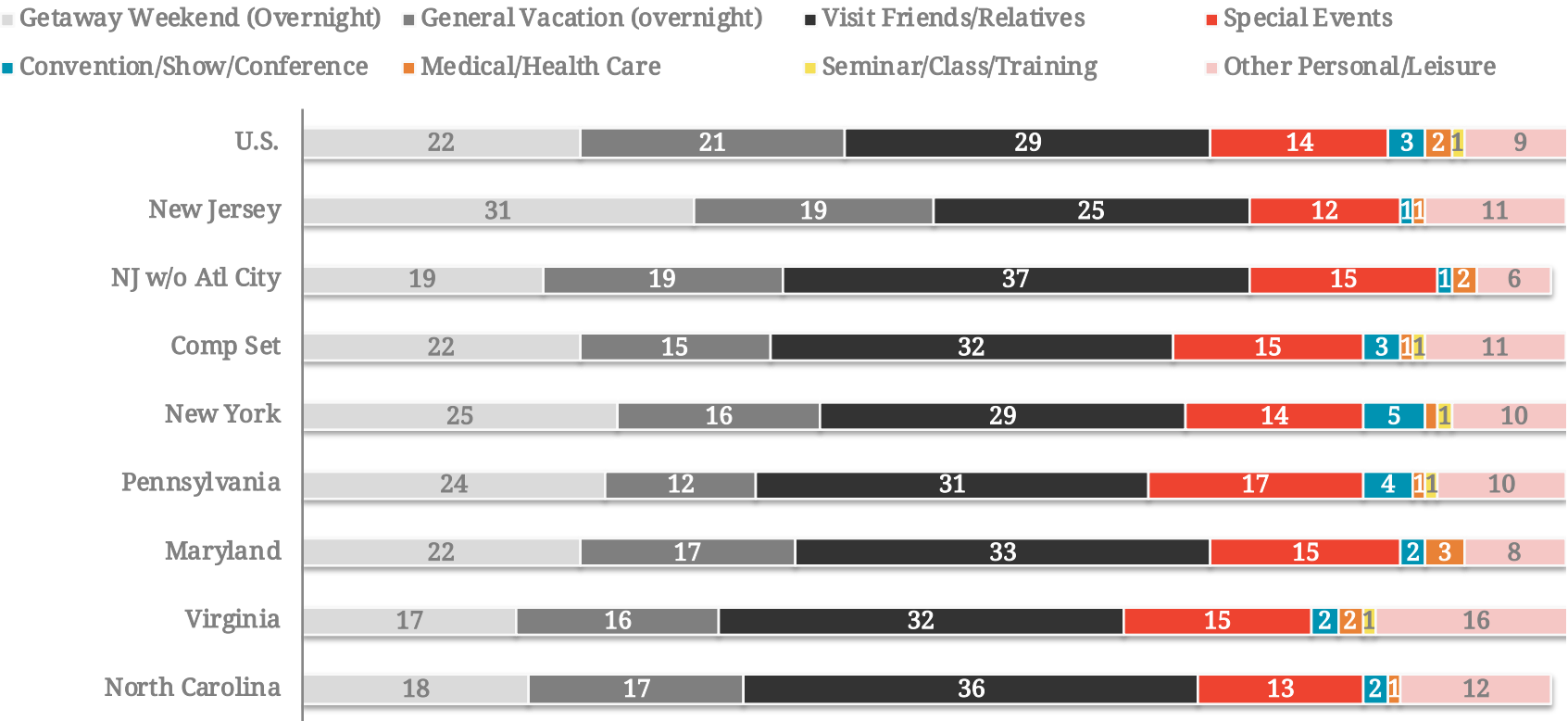


Chart 38 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 932 household count

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

TRIP CHARACTERISTICS

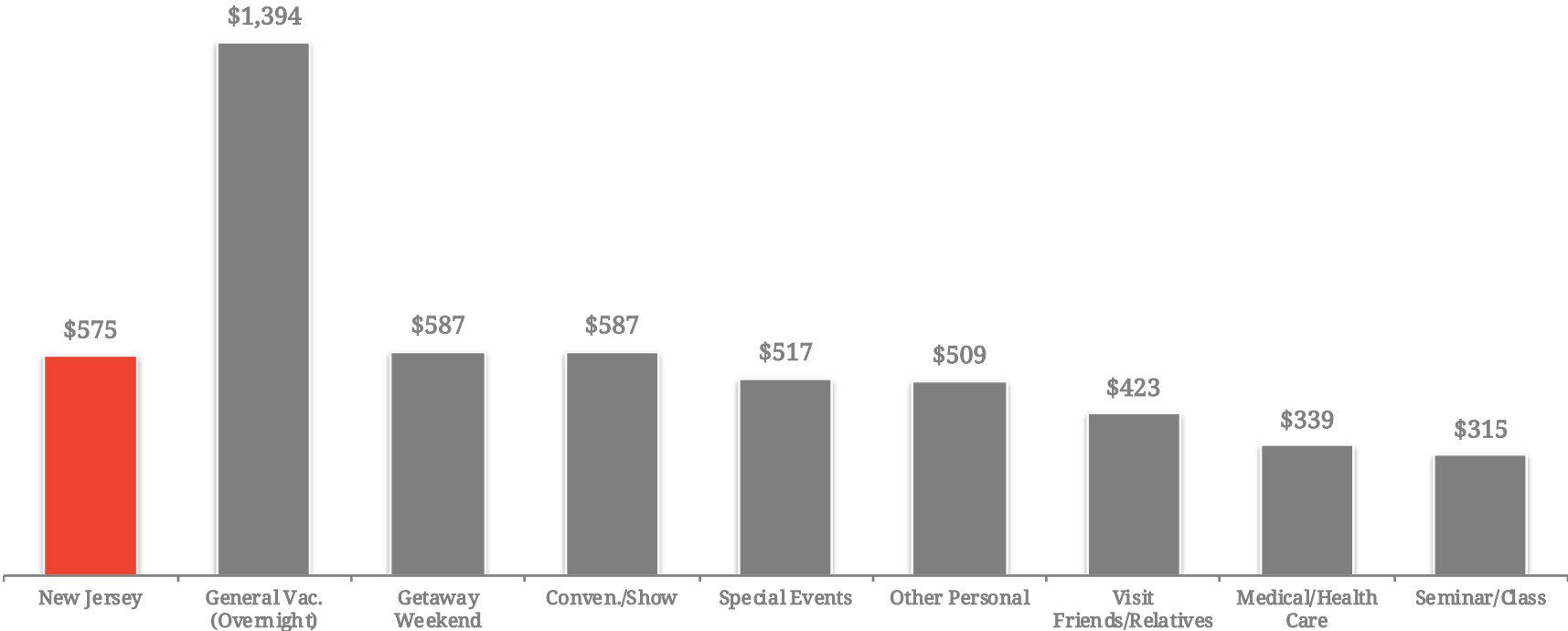


Chart 39 • Segment: 2017-2019 Overnight Leisure Stays (\$) • New Jersey n = 2,827 household count

# New Jersey Purpose of Stay Comparison

TRIP CHARACTERISTICS

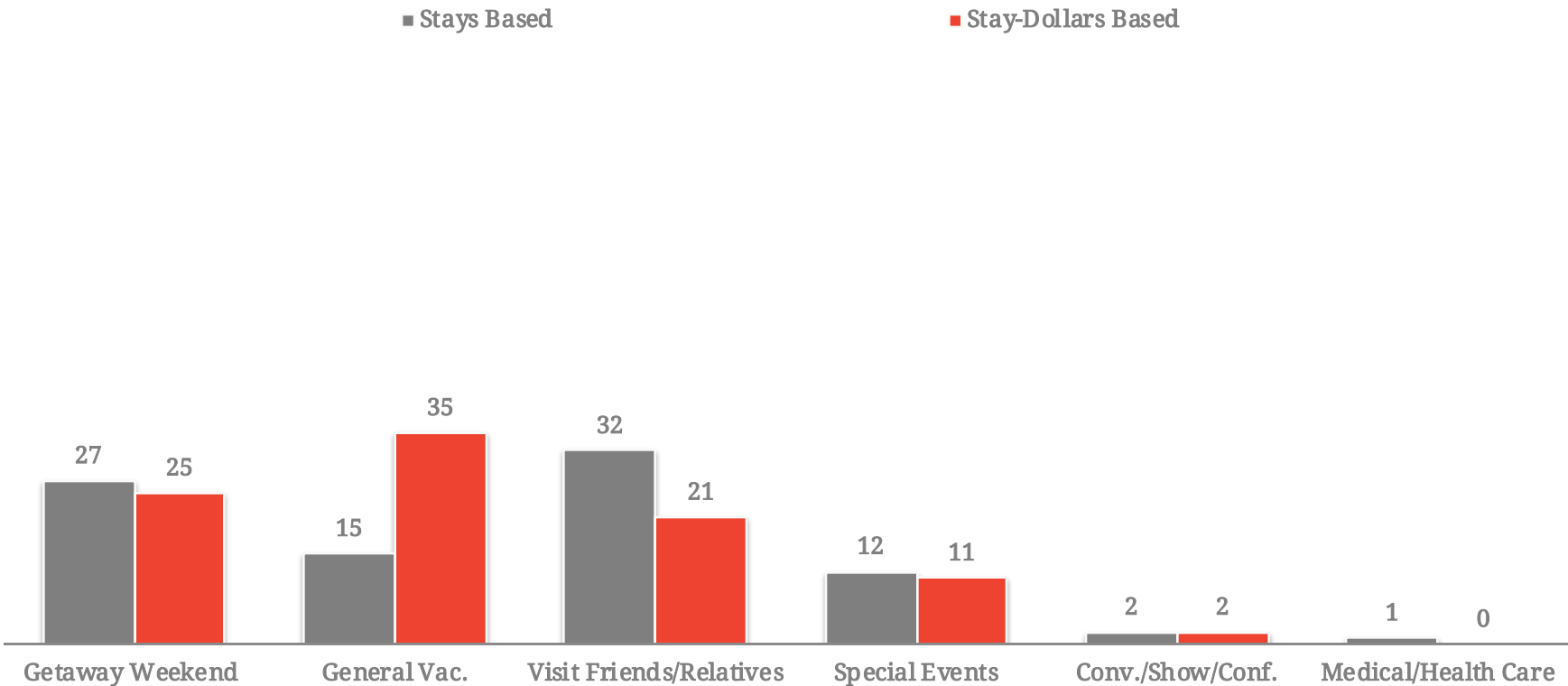


Chart 40 • Segment: 2017-2019 Overnight Leisure (%) • New Jersey n = 3,289 household count

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

TRIP CHARACTERISTICS

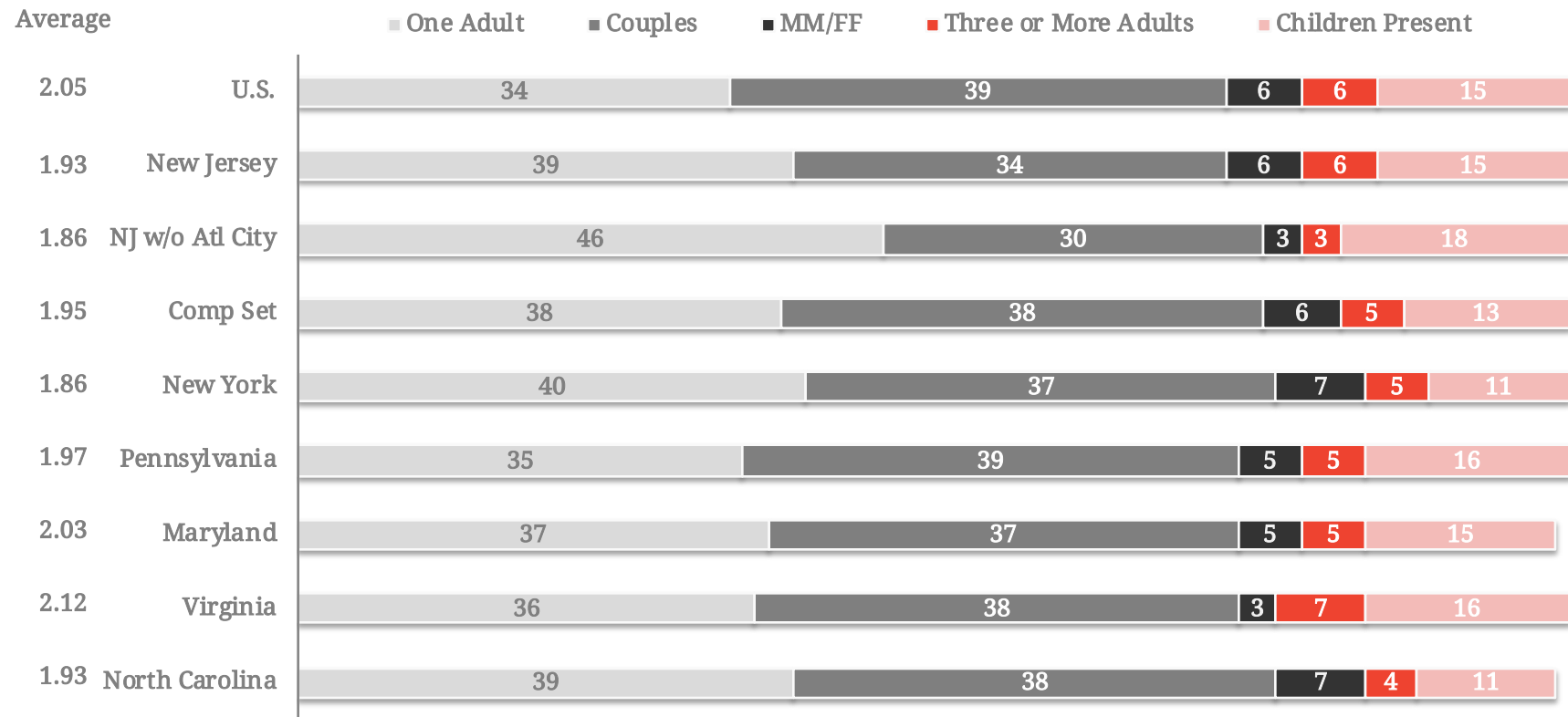


Chart 41 • Segment: 2019 Overnight Leisure Stays (%) • New Jersey n = 932 household count

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

TRIP CHARACTERISTICS

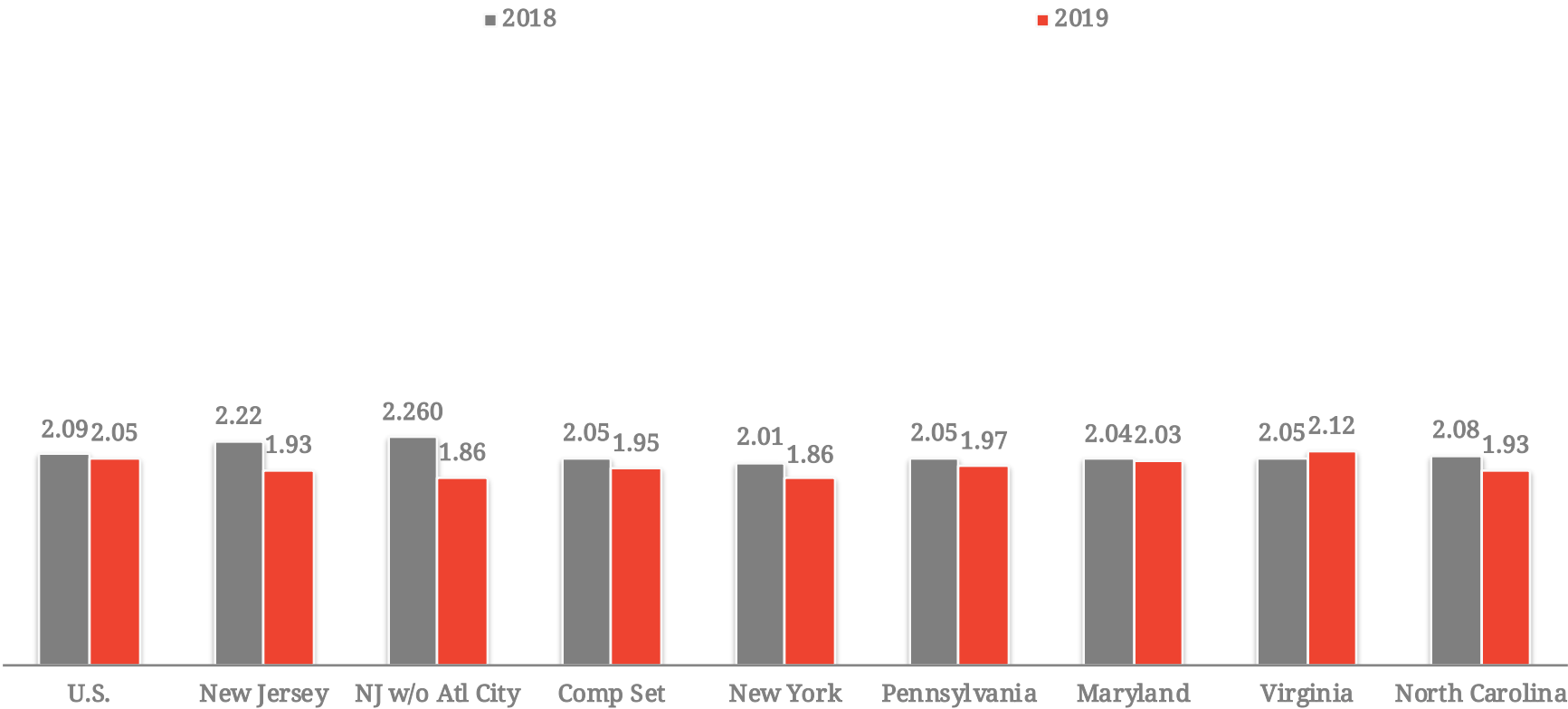


Chart 42 • Segment: 2018/2019 Overnight Leisure Stays • New Jersey n = 932 household count

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

TRIP CHARACTERISTICS

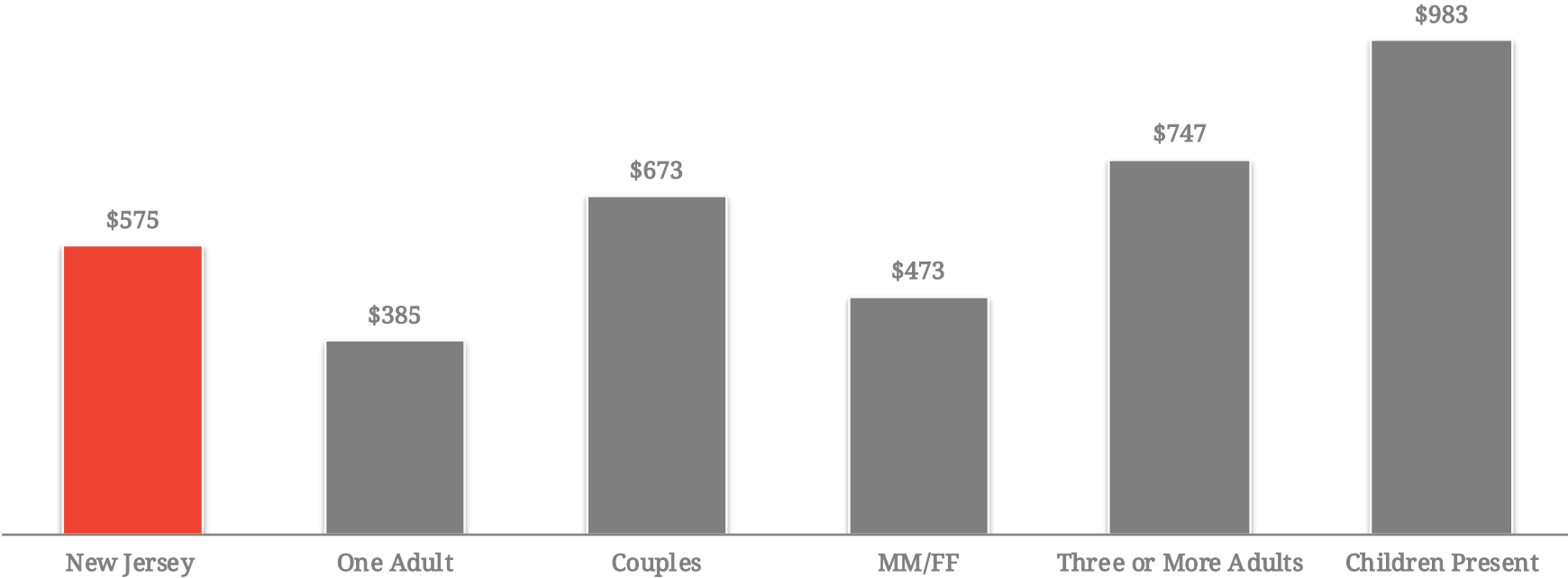


Chart 43 • Segment: 2017-2019 Overnight Leisure Stays (\$) • New Jersey n = 2,827 household count

# New Jersey Travel Party Comparison

TRIP CHARACTERISTICS

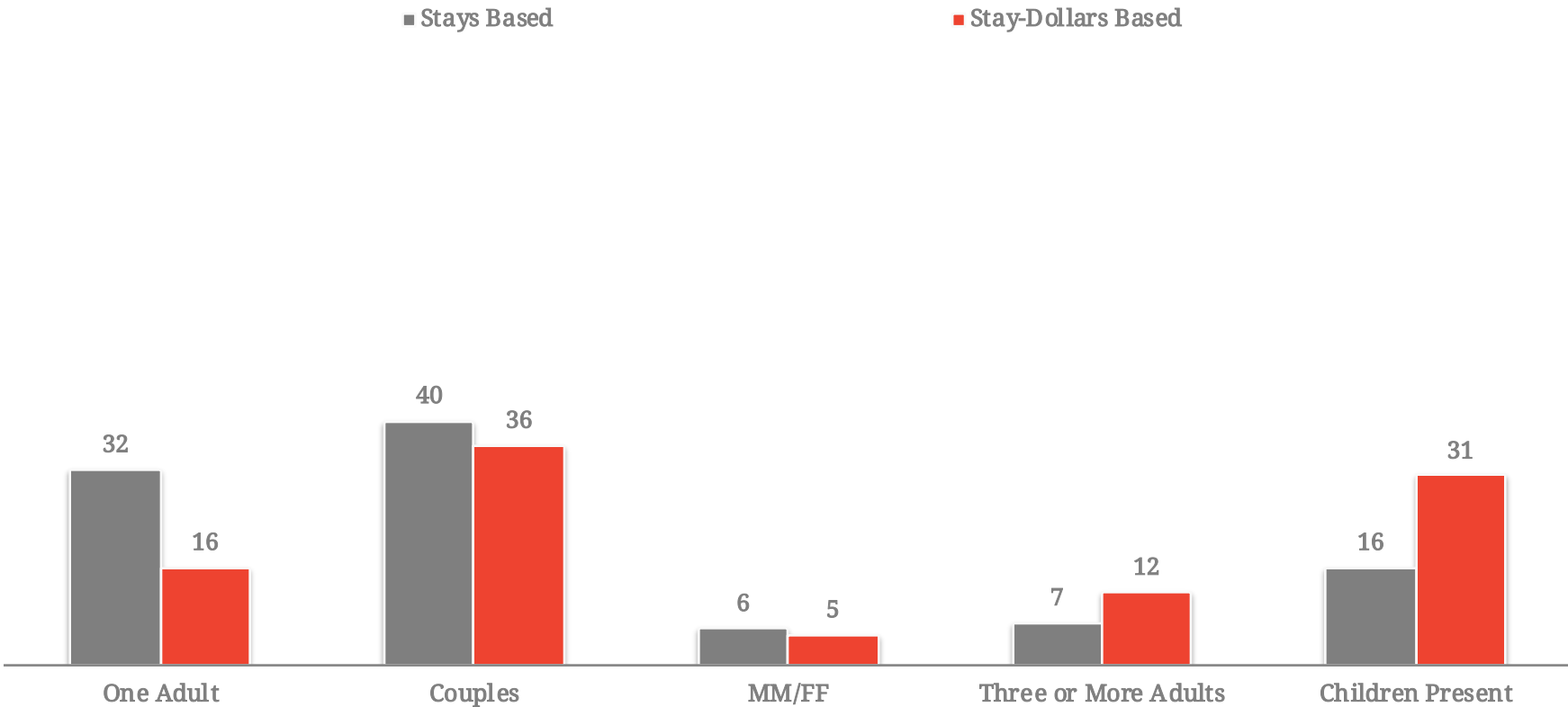


Chart 44 • Segment: 2017-2019 Overnight Leisure (%) • New Jersey n = 3,289 household count



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

TRIP CHARACTERISTICS

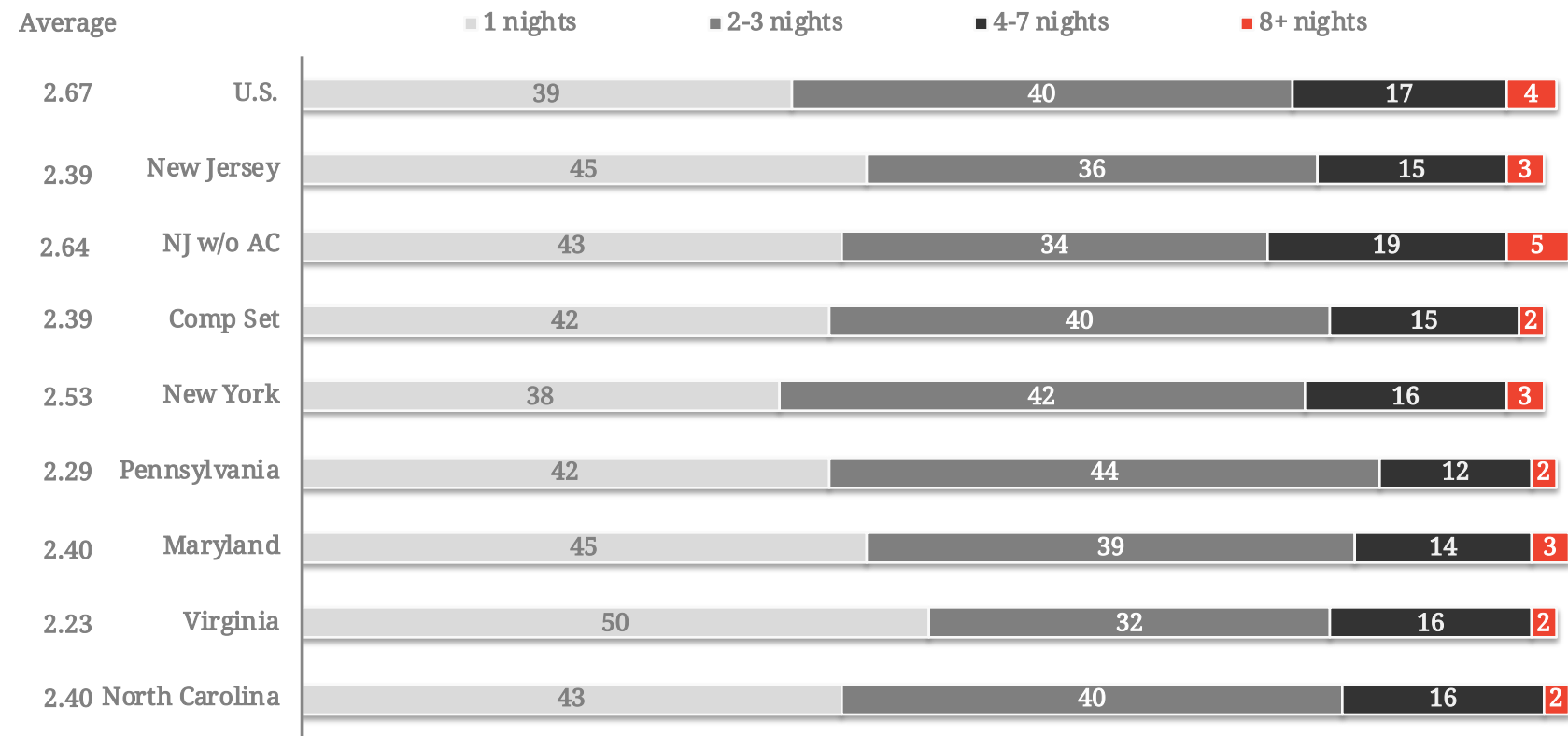


Chart 45 • Segment: 2019 Overnight Leisure Stays (%) • New Jersey n = 932 household count

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

TRIP CHARACTERISTICS

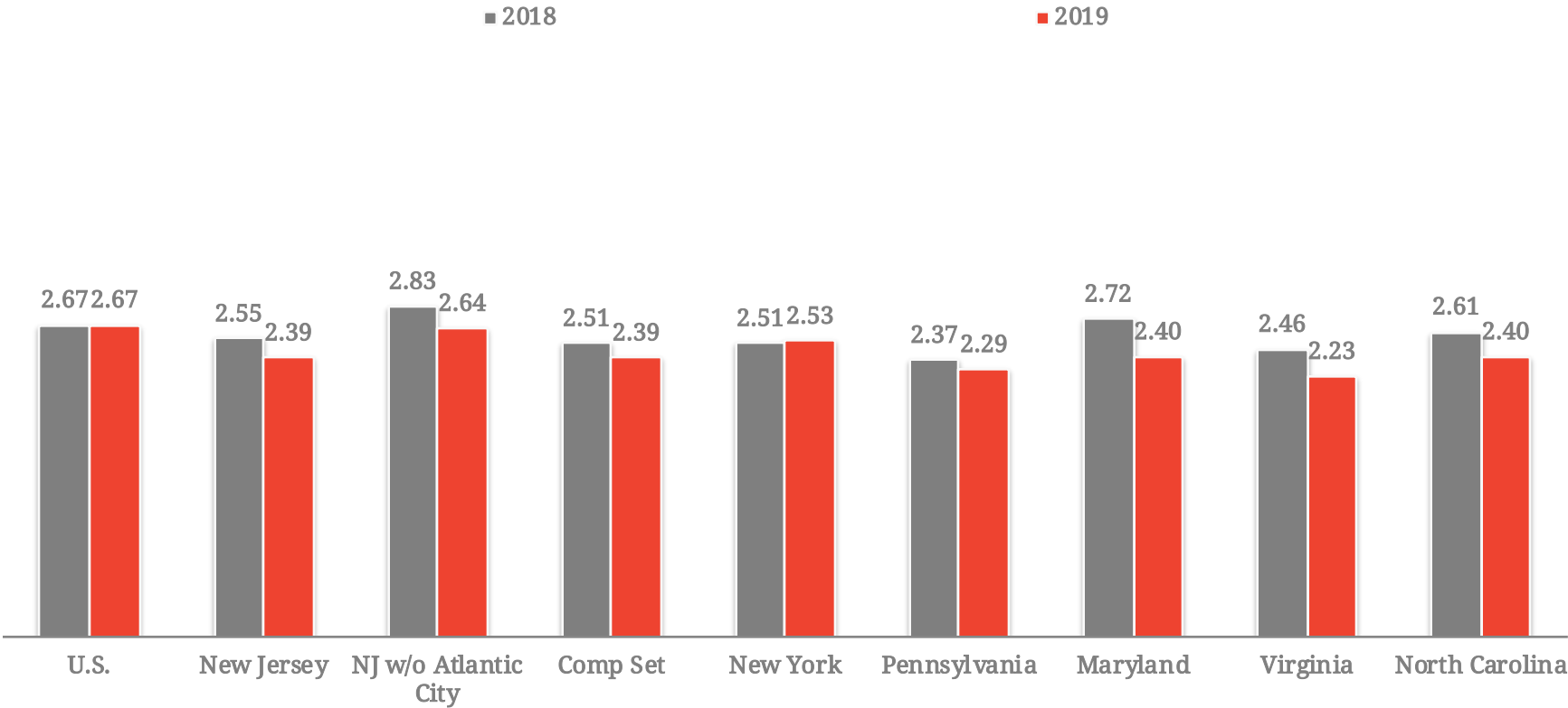


Chart 46 • Segment: 2018/2019 Overnight Leisure Stays • New Jersey n = 932 household count

# New Jersey Avg. Party per Stay Spending by Stay Length

TRIP CHARACTERISTICS

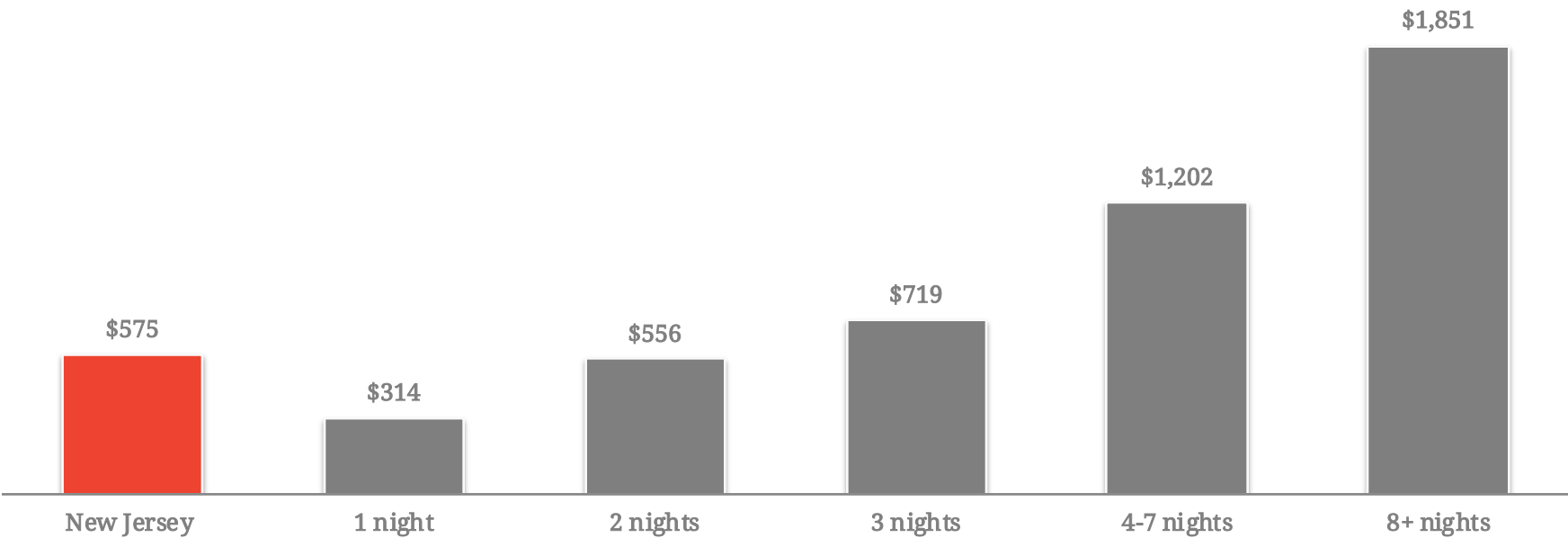


Chart 47 • Segment: 2017-2019 Overnight Leisure Stays (\$) • New Jersey n = 2,827 household count

# New Jersey Stay Length Comparison

TRIP CHARACTERISTICS

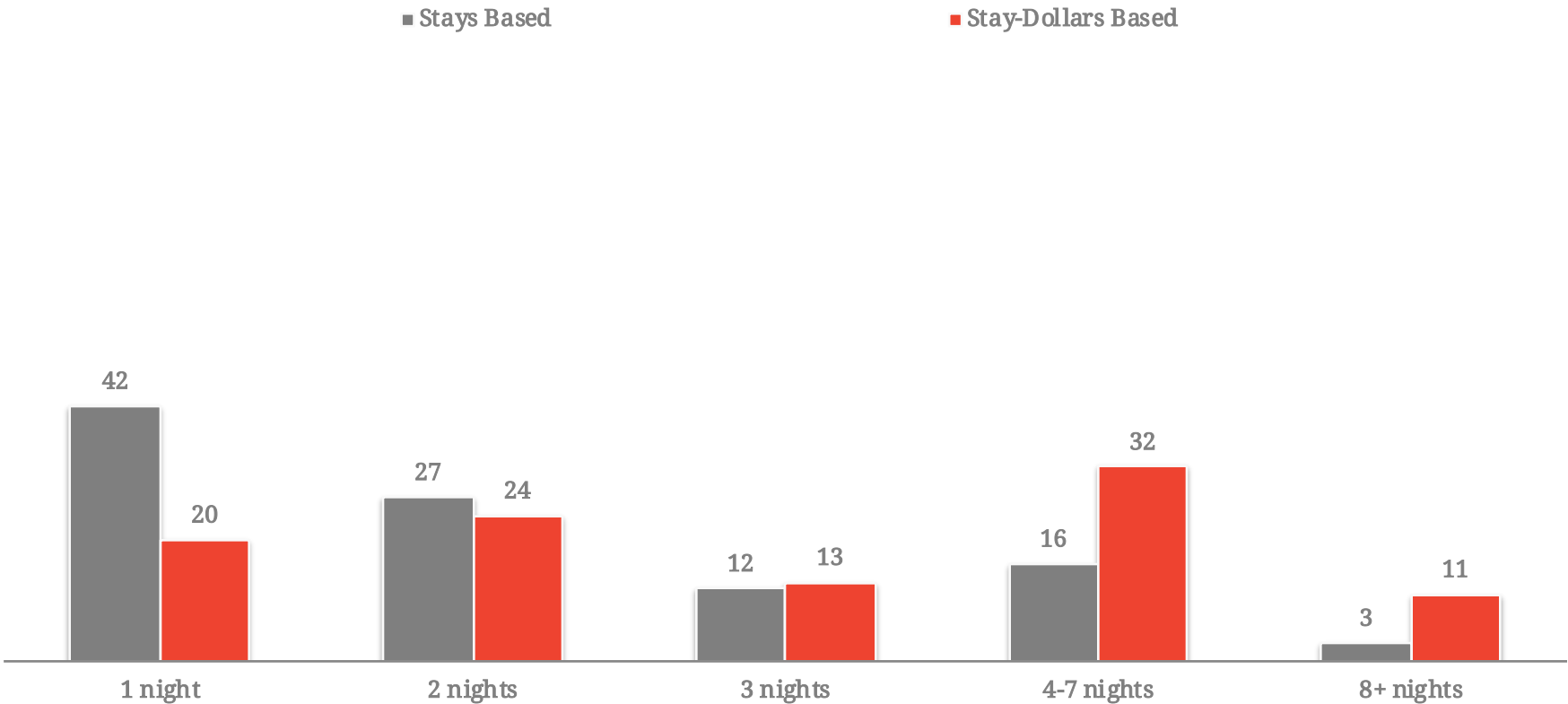


Chart 48 • Segment: 2017-2019 Overnight Leisure (%) • New Jersey n = 3,289 household count

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

TRIP CHARACTERISTICS

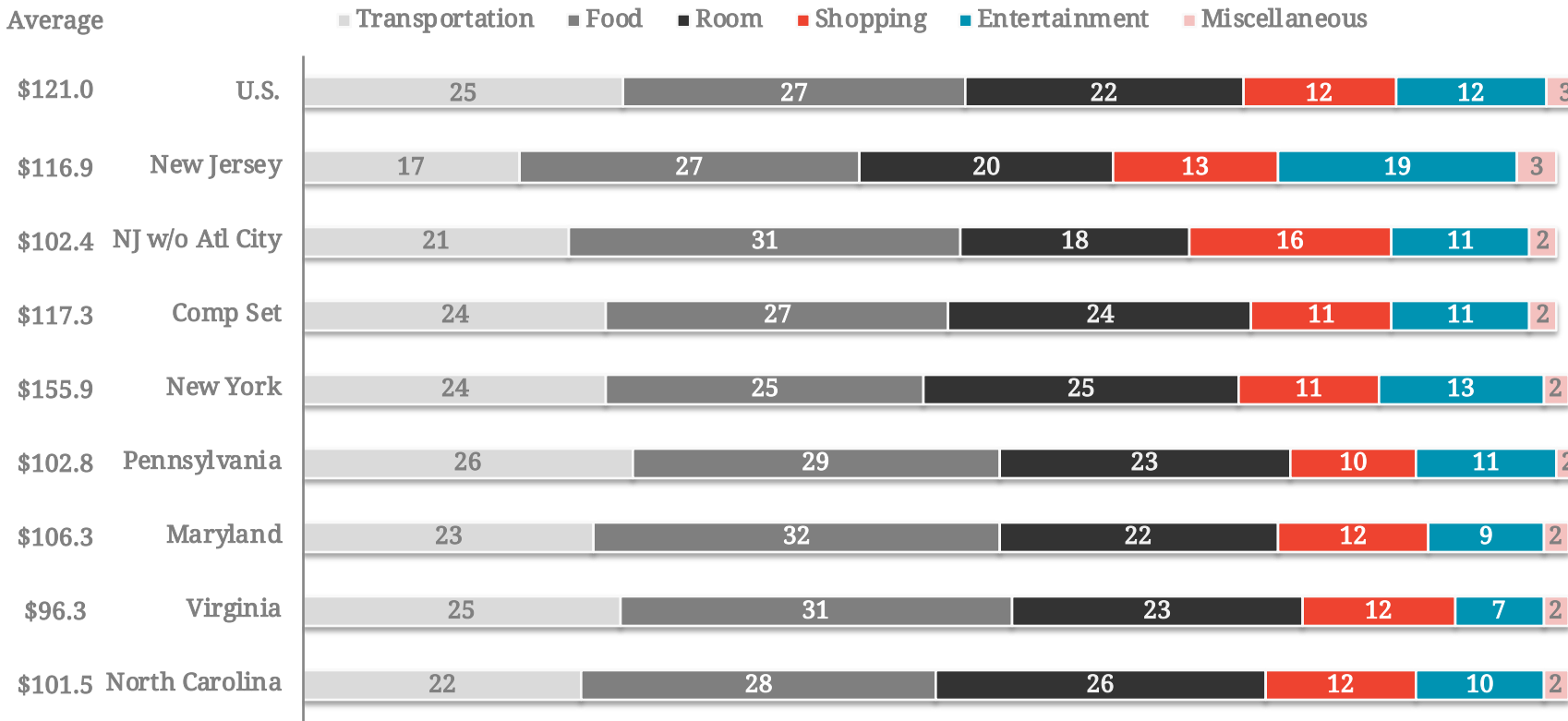


Chart 45 • Segment: 2019 Overnight Leisure Person-Days (%) • New Jersey n = 749 household count

# New Jersey Activity Participation

## ACTIVITY PARTICIPATION

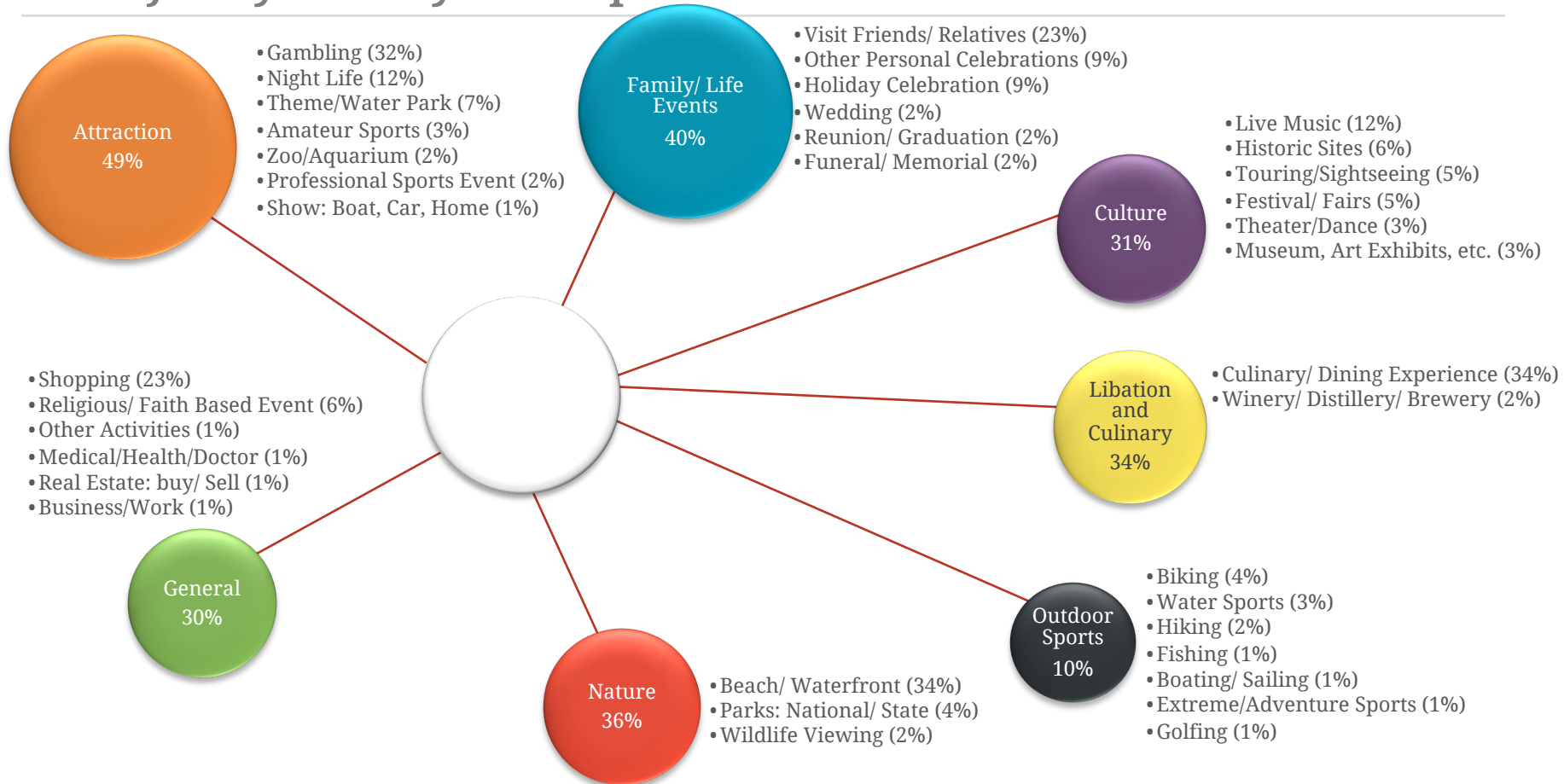


Chart 46 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 932 household count

# 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	18%	34%	34%	10%	6%	27%	16%	20%
Culinary/Dining Experience	29%	34%	31%	31%	23%	26%	26%	29%
Gambling	7%	32%	4%	4%	4%	6%	*	5%
Visit Friends/Relatives	30%	23%	33%	30%	31%	33%	27%	32%
Shopping	24%	23%	24%	24%	17%	21%	16%	23%
Live Music	9%	12%	9%	9%	7%	9%	8%	11%
Nightlife	10%	12%	9%	13%	9%	13%	5%	12%
Other Personal Celebrations	9%	9%	9%	11%	9%	9%	13%	7%
Holiday Celebration (Thanksgiving, July 4th etc.)	7%	9%	11%	6%	8%	7%	8%	7%
Theme/Amusement/Water Parks	7%	7%	10%	2%	9%	2%	5%	1%
Historic Sites	13%	6%	9%	18%	19%	8%	15%	10%
Movies	5%	6%	4%	5%	4%	3%	3%	4%
Religious/Faith Based Conference	3%	6%	9%	4%	2%	2%	3%	2%
Touring/Sightseeing	16%	5%	6%	20%	13%	10%	12%	13%
Festivals/Fairs (state, craft etc.)	6%	5%	7%	7%	5%	5%	4%	5%
Biking	2%	4%	6%	1%	1%	4%	4%	2%
Parks (national, state)	15%	4%	6%	19%	10%	14%	14%	13%
Amateur Sports	4%	3%	3%	4%	5%	3%	3%	2%
Museums, Art Exhibits, etc.	9%	3%	5%	17%	11%	7%	9%	7%
Theater/Dance Performance	3%	3%	3%	12%	3%	1%	2%	2%
Zoo/Aquarium	4%	2%	3%	4%	3%	4%	4%	4%
Water Sports	2%	3%	4%	1%	1%	3%	5%	3%

Chart 47 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 932 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
Wedding	3%	2%	3%	3%	4%	3%	3%	3%
Funeral/Memorial	2%	2%	3%	2%	1%	1%	2%	1%
Hiking	6%	2%	2%	6%	4%	2%	4%	5%
Reunion/Graduation	3%	2%	3%	2%	3%	3%	3%	3%
Wildlife Viewing (birds, whales, etc.)	5%	2%	4%	2%	4%	4%	4%	4%
Winery/Distillery/Brewery Tours	4%	2%	2%	3%	4%	2%	4%	8%
Professional Sports Event	3%	2%	2%	3%	4%	2%	2%	3%
Business/Work	1%	1%	1%	1%	*	*	*	1%
Extreme/Adventure Sports	1%	1%	1%	*	*	1%	1%	1%
Golfing	2%	1%	2%	1%	1%	1%	3%	2%
Real Estate (buy/sell)	1%	1%	1%	1%	*	1%	*	1%
Camping	4%	1%	1%	4%	5%	*	3%	2%
Boating/Sailing	3%	1%	2%	3%	2%	3%	2%	1%
Fishing	3%	1%	1%	2%	2%	1%	3%	3%
Medical/Health/Doctor Visit	2%	1%	1%	2%	2%	2%	2%	1%
Show: Boat, Car, Home	3%	1%	1%	3%	3%	1%	1%	1%
Spa	1%	1%	*	1%	1%	1%	2%	*
Tennis	*	1%	1%	*	*	1%	1%	1%
Eco/Sustainable Travel	1%	*	1%	1%	*	*	*	1%
Service/Volunteerism/Charity	1%	*	*	*	1%	*	*	*%
Snow/Winter Sports	1%	0%	0%	1%	2%	*	2%	*
Hunting	1%	0%	0%	1%	1%	*	*	*

Chart 48 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 932 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.

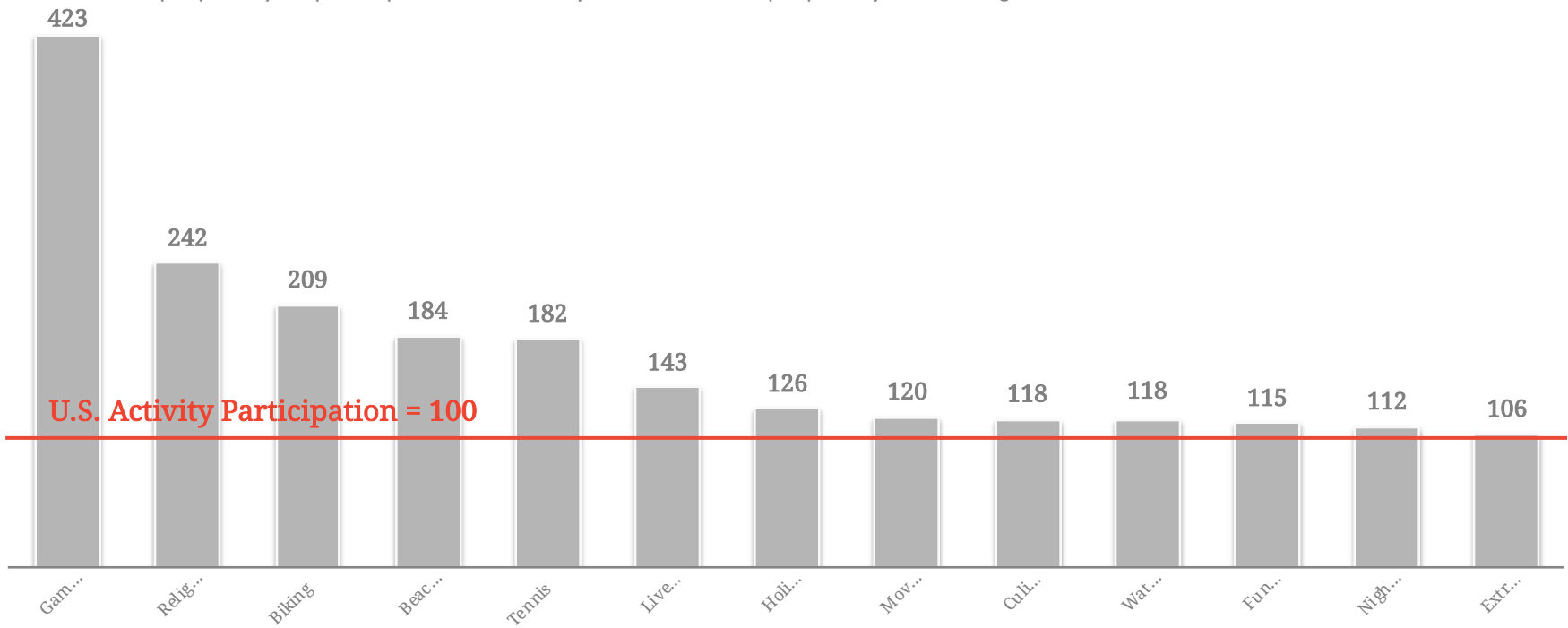


Chart 49 • Segment: 2019 Overnight Leisure Person-Stays • New Jersey n = 932 household count

# 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.

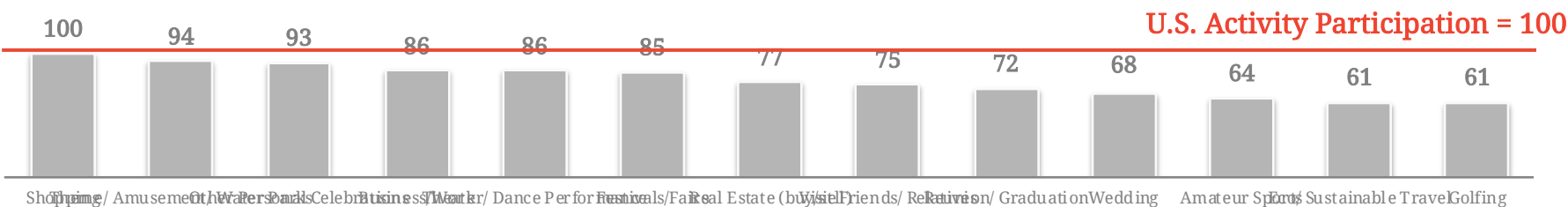


Chart 50 • Segment: 2019 Overnight Leisure Person-Stays • New Jersey n = 932 household count

# New Jersey Avg. Party per Stay Spending by Activities

ACTIVITY PARTICIPATION

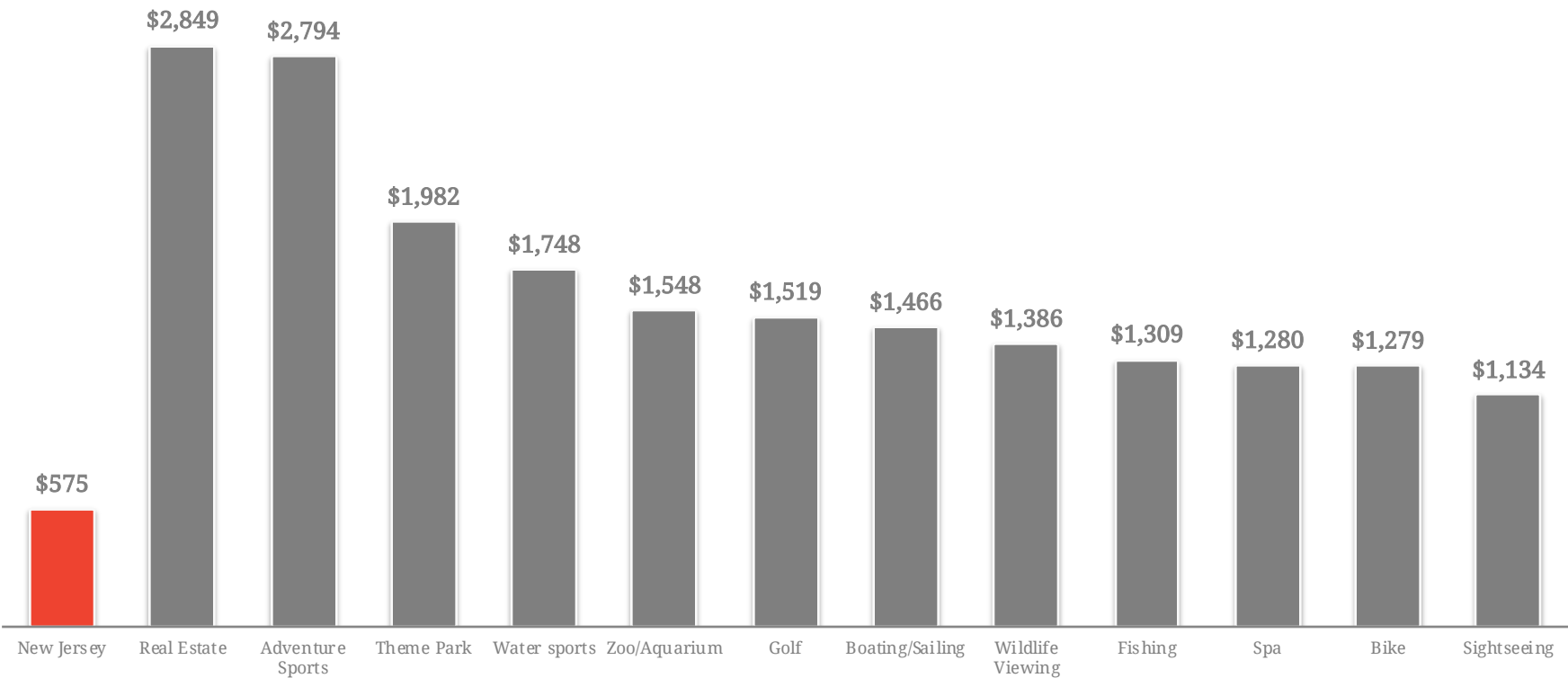


Chart 51 • Segment: 2017-2019 Overnight Leisure Stays (\$) • New Jersey n = 2,827 household count

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

ACTIVITY PARTICIPATION

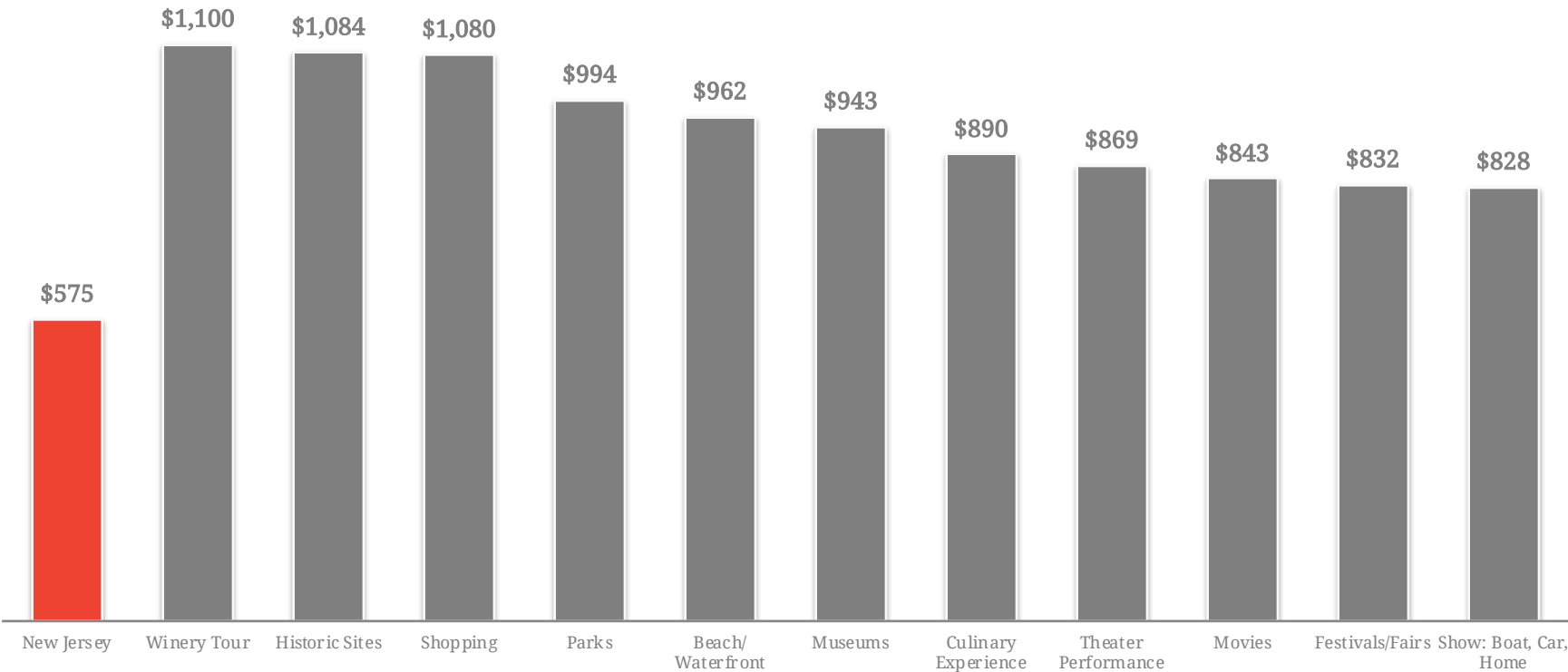


Chart 52 • Segment: 2017-2019 Overnight Leisure Stays (\$) • New Jersey n = 2,827 household count

# New Jersey Activity Comparison

## ACTIVITY PARTICIPATION

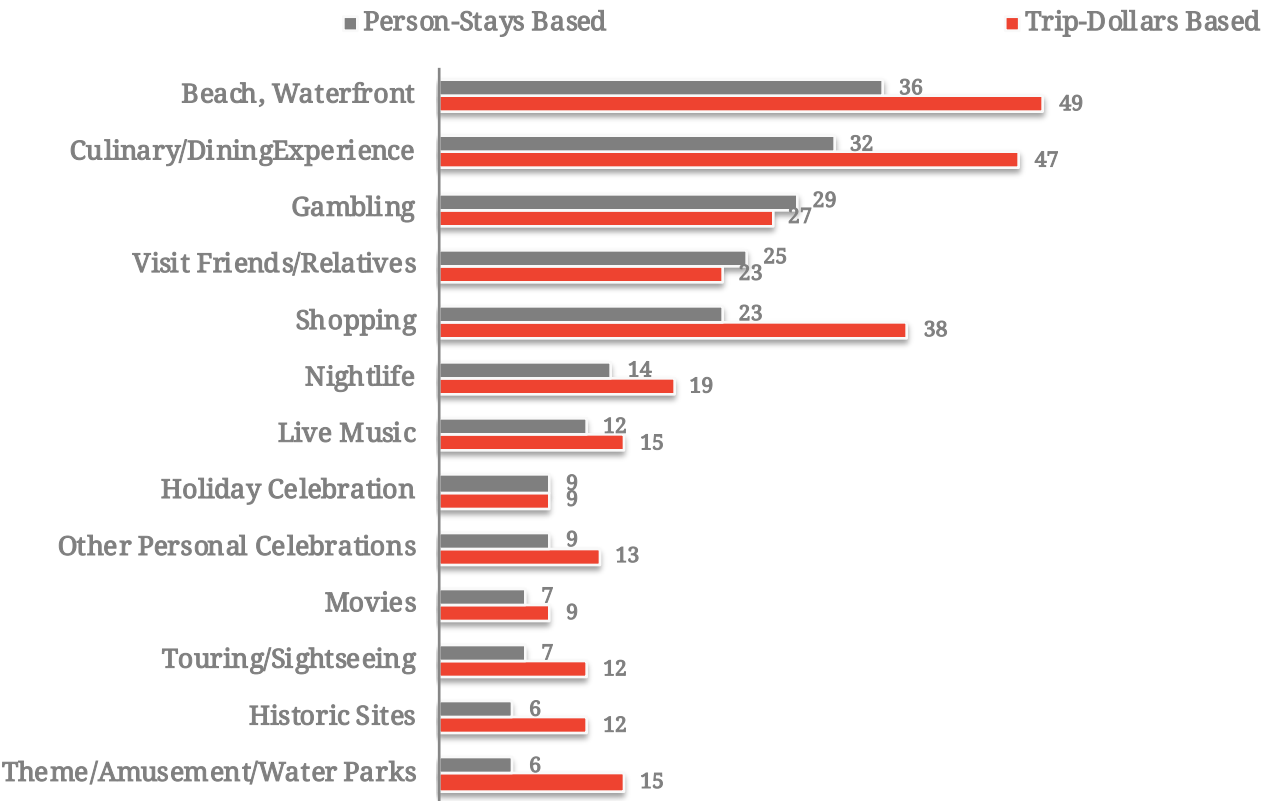


Chart 53 • Segment: 2017-2019 Overnight Leisure (%) • New Jersey n = 3,289 household count

# New Jersey Activity Comparison (cont.)

## ACTIVITY PARTICIPATION

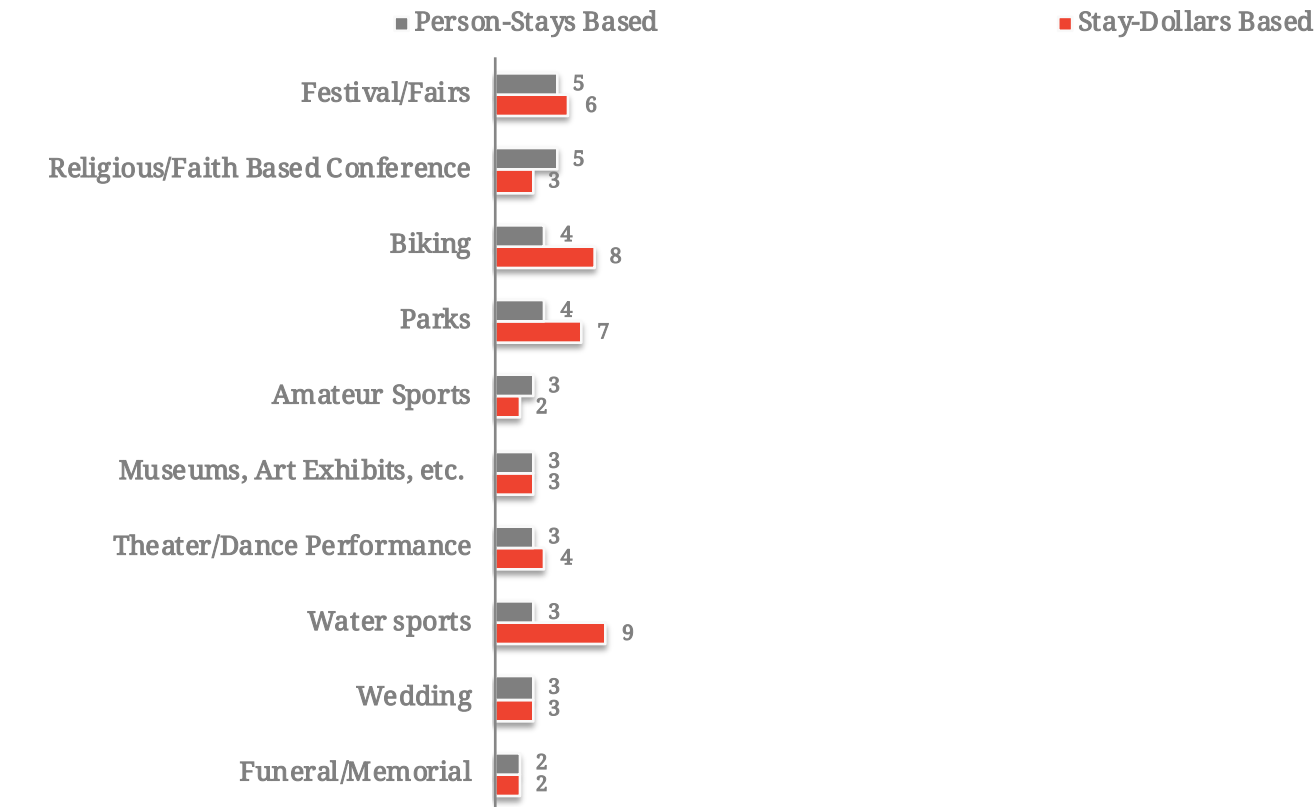


Chart 54 • Segment: 2017-2019 Overnight Leisure (%) • New Jersey n = 3,289 household count

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

ACCOMMODATION

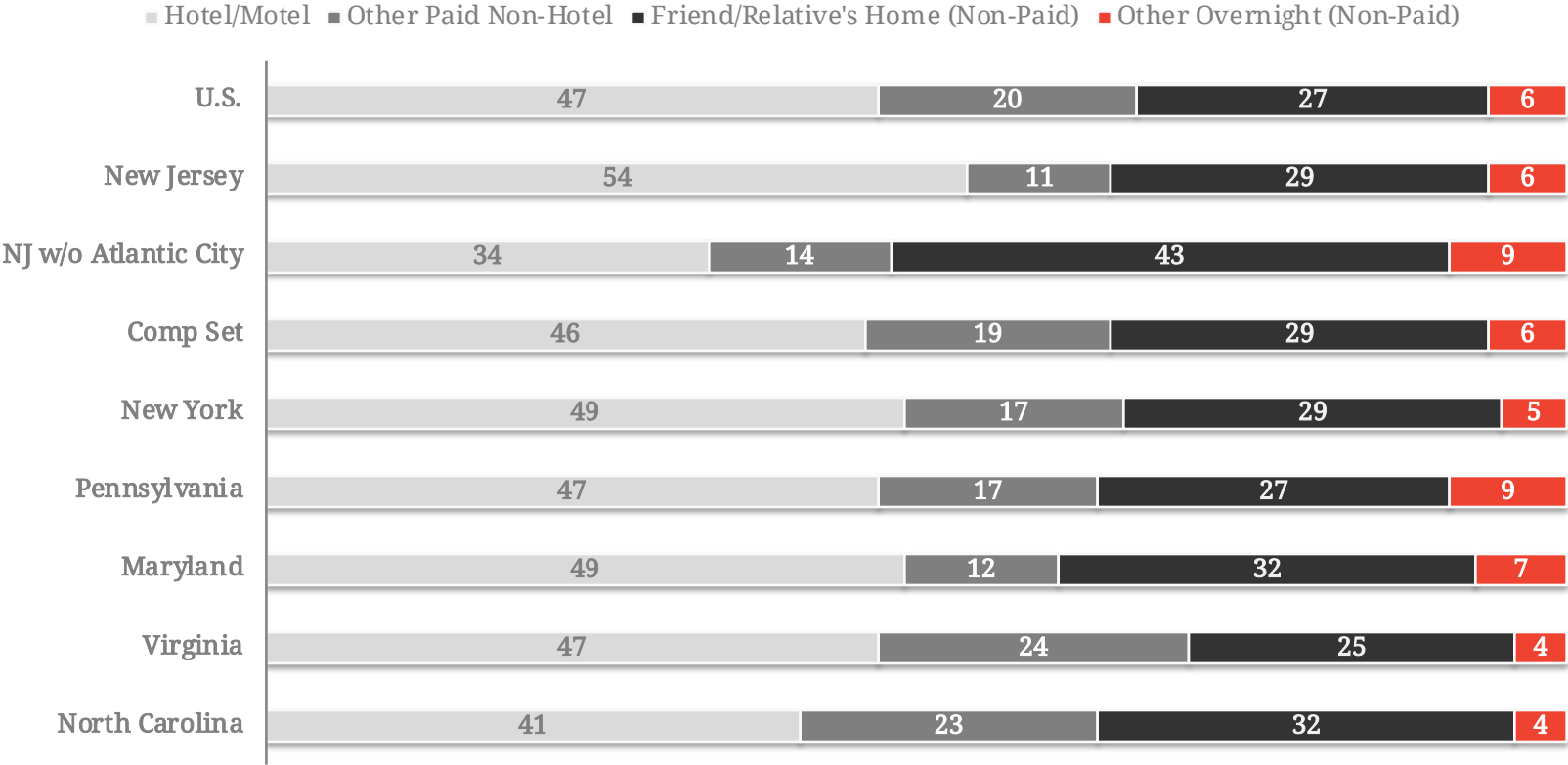


Chart 55 • Segment: 2019 Overnight Leisure Person-Stays (%) • New Jersey n = 932 household count

# New Jersey Avg. Party per Stay Spending by Accommodation Type

ACCOMMODATION

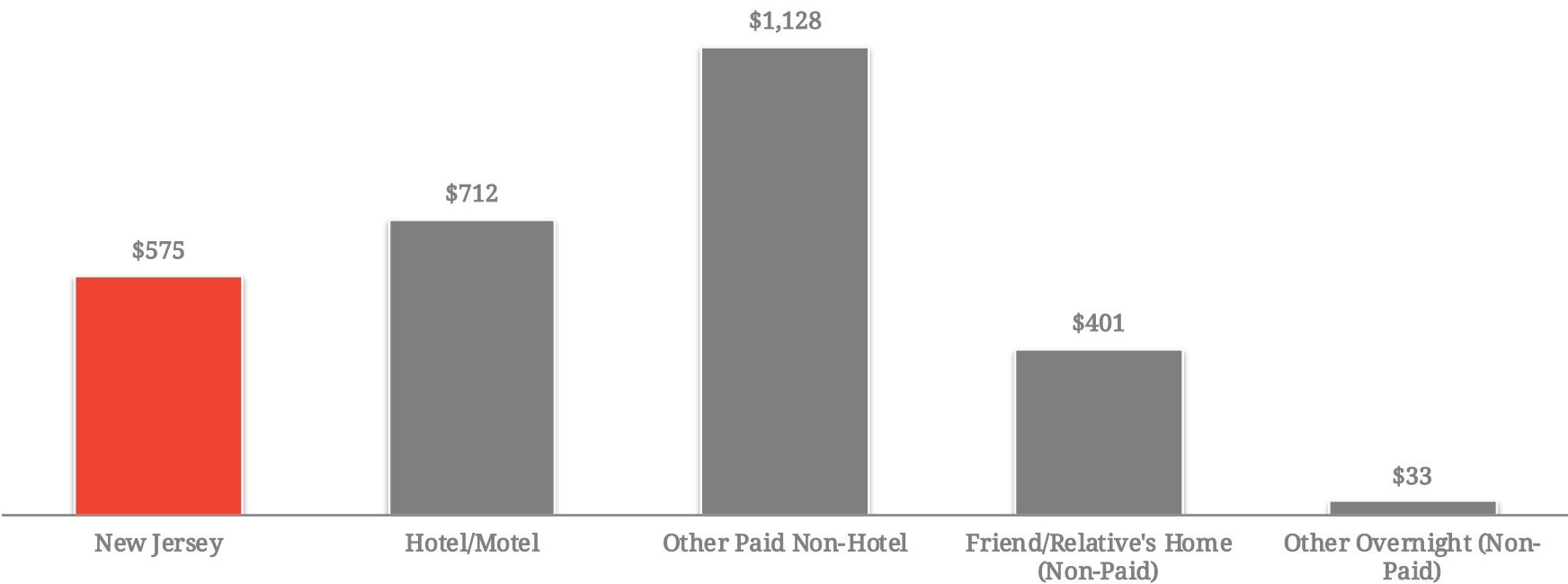


Chart 56 • Segment: 2017-2019 Overnight Leisure Stays (\$) • New Jersey n = 2,827 household count



# New Jersey Accommodation Type Comparison

ACCOMMODATION

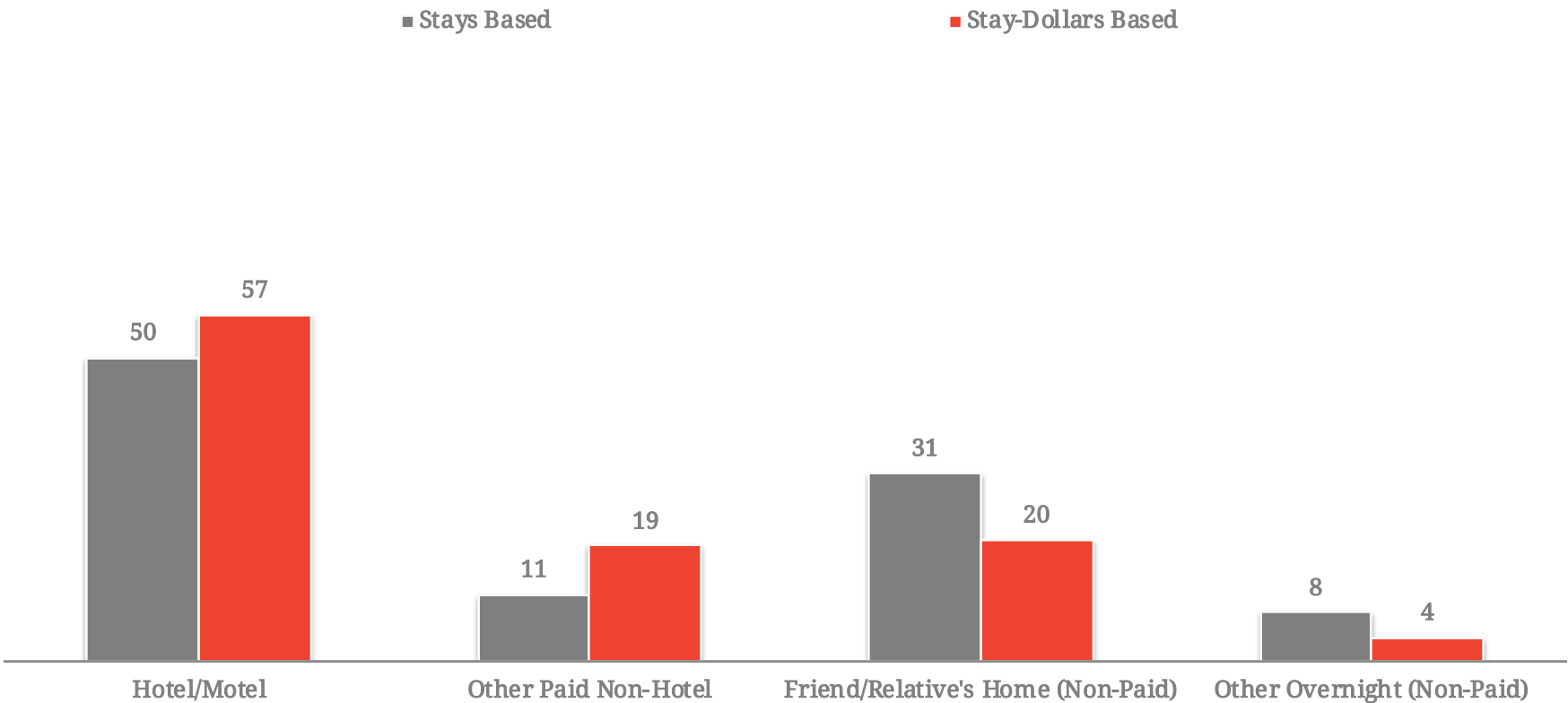


Chart 57 • Segment: 2017-2019 Overnight Leisure (%) • New Jersey n = 3,289 household count

## 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.	34,648	0.1%	0.2%	0.2%	0.3%	0.4%
New Jersey	932	0.5%	1.0%	1.4%	2.0%	2.7%
New York	2,425	0.3%	0.6%	0.9%	1.3%	1.7%
Pennsylvania	1,624	0.4%	0.7%	1.1%	1.5%	2.0%
Maryland	697	0.6%	1.1%	1.6%	2.4%	3.1%
Virginia	1,044	0.5%	0.9%	1.3%	1.9%	2.5%
North Carolina	1,435	0.4%	0.8%	1.1%	1.6%	2.2%

## Significance Testing

The chart below compares two proportions from different samples for statistical significance.

Instructions: Enter the proportion for each sample and sample size in the appropriate cells in the data input section, using the Z Score Table, compare the resulting Z score with the Z score corresponding to your desired confidence level. If the resulting Z score is greater than the table Z score, the difference between the two proportions is statistically significant. If the resulting Z score is lower, there is no significant difference.

Data Input	Sample 1	Sample 2	Resulting Z Score	Z score	Confidence Level
Proportion	6.0%	7.0%		(+/-) 1.96	95%
Sample Size (n)	783	865	-0.82	(+/-) 1.64	90%

# Research Methodology

DK Shifflet's **TRAVEL PERFORMANCE/Monitor<sup>SM</sup>** 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.