New Jersey Day Leisure Visitor Profile

Q4 2021 – Q3 2022

MMGY Travel Intelligence

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EXECUTIVE SUMMARY

Focus on New Jersey's Core Customers

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

- Age: 55+ years old and 18-34 years old

- Income: $121K on average

- Lifestages: Mature travel parties without children making more than $60K (Affluent Mature), young travel parties without children in household (Young & Free), and young travel parties with children (Young Family).

- Employment: Managerial/Professionals and Technical/Sales/Administrative

- Purpose of Stay: majority travel is for a Day Trip Getaway/Vacation or to Visit Friends/Relatives

- Activity: the activities visitors participate in the most are beach/waterfront, culinary/dining, shopping, gambling, and visiting friends/relatives

- Repeat Visitation: 40% of travelers visited New Jersey for the first time while 44% have visited 2-3 times

- $209 per person spending per day – 22% Transportation, 30% Food & Beverage 21% Shopping, 22% Entertainment

- Timing: Travelers visit New Jersey in Summer (45%) and Fall (28%)

- Origin: New Jersey draws the majority of its Day Leisure visitors from the Middle Atlantic, almost exclusively from New Jersey, New York, and Pennsylvania.

  - travelers travel an average of 77 miles one-way

  - most travelers arrive by auto

Focus on your opportunity among New Jersey's visitors:

While understanding the travelers in terms of who is visiting the destination, 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 all travel. Many of these segments represent a small share of travelers yet are characterized by a higher trip-dollar spending share which makes them particularly valuable to target. The segments below hold particular or additional potential to increase New Jersey's bottom line in traveler spending:

- Age: Boomers, Millennials, and Gen Xers
- Purpose of Stay: Vacation/Get Away – Day Trip

New Jersey Historical Trends in Visitation

New Jersey hosted about 54 million day leisure visitors, spending 4.9 billion dollars in 2022 – up 28 and 36 percent respectively compared to 2021. Volume increased at a higher rate (28%) than the average U.S. destination (22%) this year.

Day Leisure travelers make up about 49% 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 18.8% to New Jersey's Total Spending.

Visitor Volume
PERSON-STAYS (MILLIONS) INDEXED TO 2018

- 111.5 Million Visitors – 23% ⬆
  - 54.1 Day Leisure – 28% ⬆
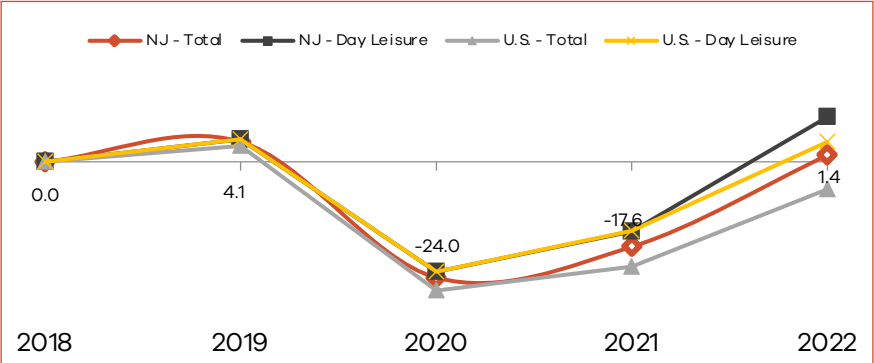
Visitor Spending
DIRECT SPENDING (BILLIONS) INDEXED TO 2018
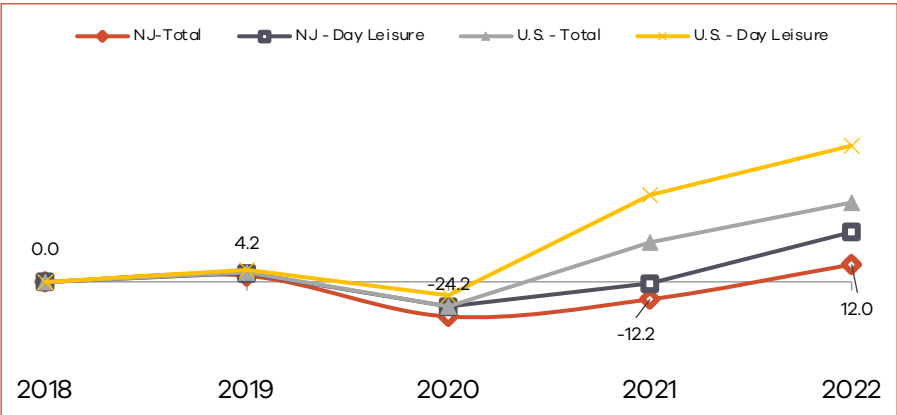
- $26.0 Billion Dollars – 28% ⬆
  - $4.9 Day Leisure – 36% ⬆

Overall, the impact of New Jersey's Day Leisure visitation on the share of the US travel market decreased slightly from 2021. Among all its competitors, New Jersey's Day Leisure traveler segment captured the fourth largest share of the US travel market in three of the four travel metrics –Person-Stays, Person-Days, and Trip-Dollars, while it came in fifth for Stays. New York and Virginia saw the only increases in market share in 2022 while the rest decreased.

New Jersey's Day Leisure travel parties (or Stays) represent 2.2% 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 2.3% of the US Day Leisure travel market.

Market Share of U.S. Leisure Travel
DAY LEISURE 2022 (%)

Legend: ■ Stays   ■ Person-Stays   ■ Person-Days   ■ Stay-Dollars

	Stays	Person-Stays	Person-Days	Stay-Dollars
New Jersey	2.2%	2.3%	2.3%	2.4%
NJ w/o Atl City	1.8%	1.8%	1.8%	1.5%
New York	6.8%	6.7%	6.7%	7.6%
Pennsylvania	3.5%	3.6%	3.6%	3.4%
Maryland	1.6%	1.5%	1.5%	1.5%
Virginia	1.6%	1.8%	1.8%	1.4%
Connecticut	1.0%	1.1%	1.0%	0.8%
Massachusetts	2.6%	2.3%	2.3%	2.3%
Ohio	2.7%	2.9%	2.9%	2.5%
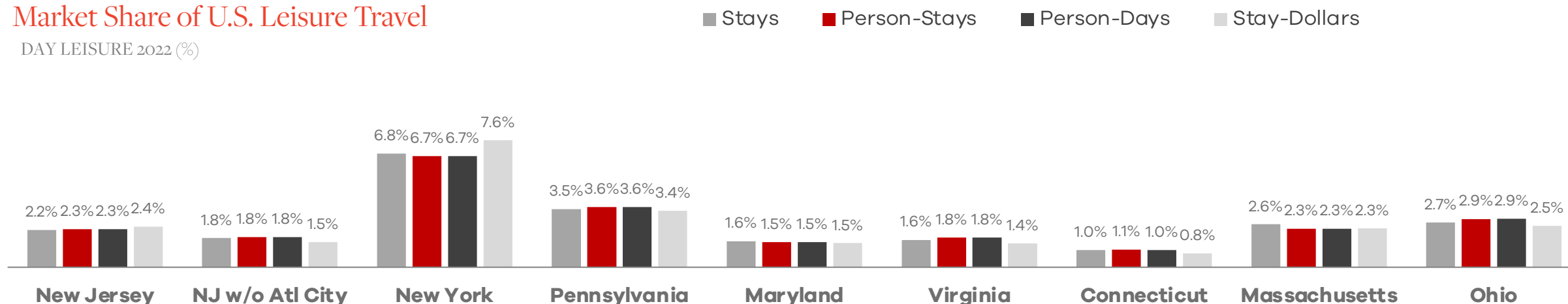
The Person-Days metric is simply the total number of days that visitors contributed to New Jersey. New Jersey's Day Leisure travelers represent 2.3% of the US Overnight market share. New Jersey Day Leisure travelers contributed the largest of all four metrics in Trip-Dollars to the US Day Leisure market; 2.4% 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 (%)

Legend: NJ — NJ w/o Atlantic City — NY — PA — MD — VA — CT — MA — OH

Y-axis: Share of U.S. Travel

X-axis: 2018, 2019, 2020, 2021, 2022
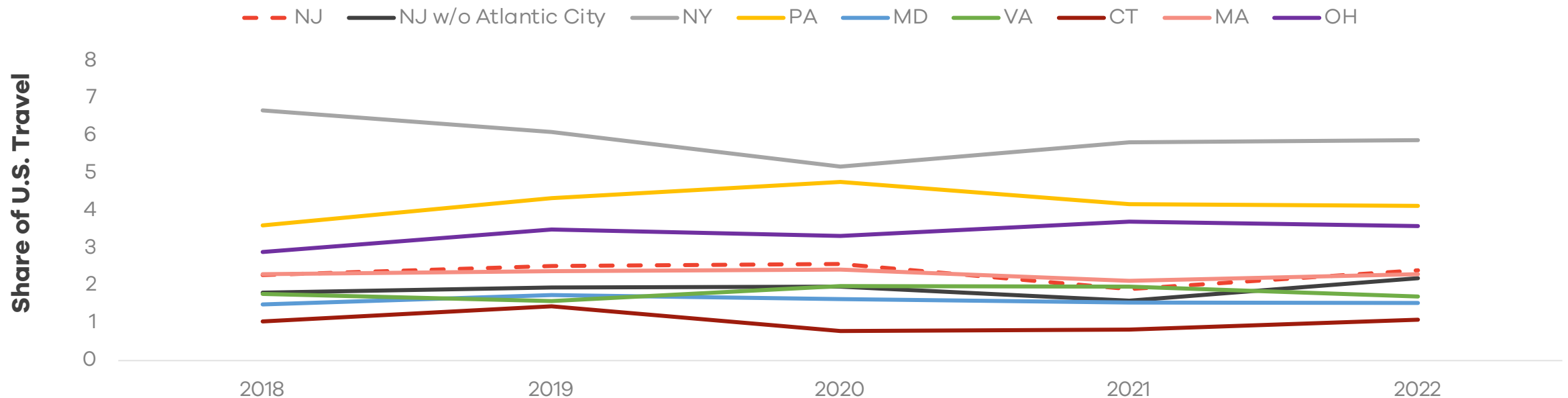
Who Are New Jersey's Day Leisure Visitors?

Compared to 2021, New Jersey's Day Leisure visitors are trending younger, with fewer retirees visiting, more with children, and with higher household incomes.

While Boomers made up the majority of visitors in 2020 and 2021, Millennials are now making up a larger portion of day leisure visitors, bringing down the average age this year.

Average incomes of New Jersey visitors increased from 2021 and are still consistently higher than visitors to the average U.S. destination and from the total competitive set.

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/CT/MA/OH)
Average Age (years)	47	45	48	49
Employed	54%	52%	55%	57%
Retired	23%	23%	24%	24%
Average Income (000)	$121.0	$109.0	$96.6	$103.8
Children in HH	34%	37%	35%	34%
Generations:				
Millennial (1981-1996)	34%	41%	32%	32%
GenX (1965-1980)	20%	17%	25%	27%
Boomer (1946-1964)	31%	26%	31%	30%
Silent/GI (1945 back)	3%	4%	3%	4%

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Where Do New Jersey's Visitors Come From?

94 percent of New Jersey Day Leisure visitors come from 5 states with 56% coming from New Jersey itself and an additional 35% 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 72 miles.

New Jersey Origin States
DAY LEISURE PERSON-STAYS (%) (2022)

New Jersey	56.2%
New York	19.7%
Pennsylvania	14.9%
West Virginia	1.9%
Virginia	1.7%
Other	5.6%

New Jersey Destination Regions
DAY LEISURE PERSON-STAYS (%)

Greater Atlantic City	26.1%	↓
Gateway	25.1%	↑
Shore	17.2%	↓
Delaware River	14.6%	↑
Southern Shore	13.2%	↑
Skylands	3.8%	↓
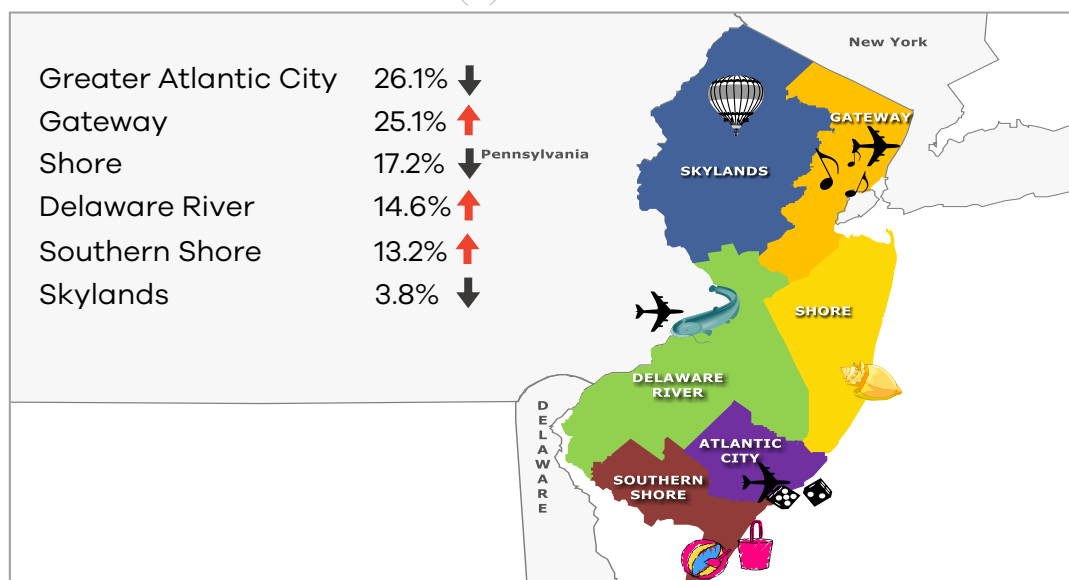
Where Do New Jersey's Visitors Go?

Similiar to last year, New Jersey Day Leisure visitors are exploring more parts of New Jersey. The most popular regions of New Jersey decreased in visitation from last year, while Delaware River and Southern Shore, regions all displayed increases in visitation in 2022.

Why Do Travelers Visit New Jersey?

Day Trip Vacations/Getaways account for one-third of Day Leisure visitors to New Jersey in 2022, followed 3 in 10 who Visit Friends/Relatives. If Atlantic City is excluded, Day Trip Vacations/Getaways drop slightly, but Visiting Friends or Relatives increases to account for 32 percent of visits.

Day Trip Vacations/Getaways and Visiting Friends/Relatives decreased slightly in 2022, while Special Events increased.

In 2022 visitors spent on average $209 in New Jersey per person per day - $9 more than in 2021 with increases in shopping (+6), entertainment (+$5), and food & beverage (+$2). 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 (%) (2022)

Legend: Vacation/Getaway - Day Trip | Visit Friends/Relatives | Special Events | Other Personal
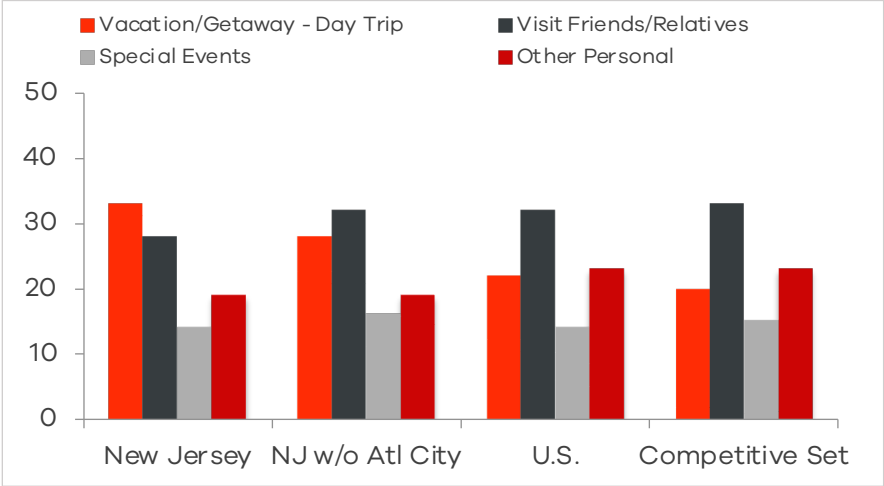
Per-Person-Per-Day Spending
Day Leisure PERSON-DAYS (%) (2022)

Legend: Transportation | Food | Shopping | Entertainment | Other

New Jersey: $209 avg. | NJ w/o Atl City: $168 avg. | U.S.: $204 avg. | Competitive Set: $198 avg.

Source: 2022 *PERFORMANCE/Monitor*[SM]
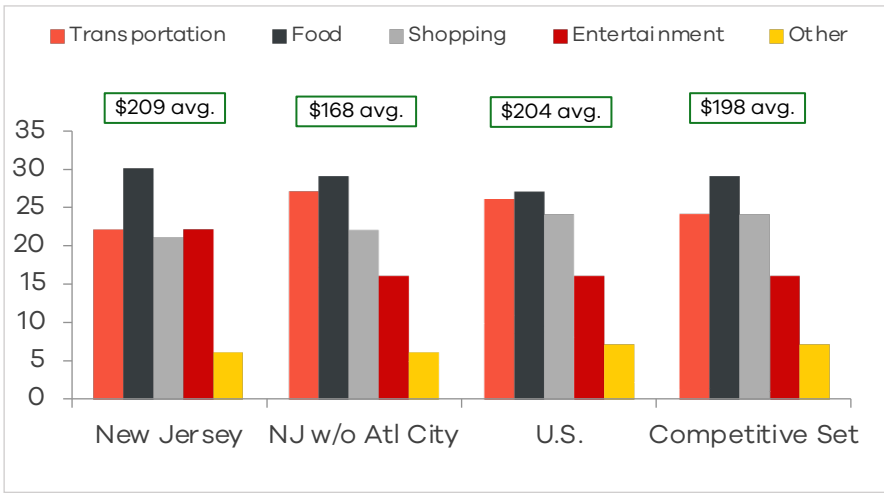
What Do New Jersey Visitors Do?

Nearly all 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 2022:

1. Beach/Waterfront

2. Culinary/Dining

3. Shopping

4. Gambling

5. Visiting Friends/Relatives

Participation in many activities increased from 2021 after seeing a drop-off last year.

When excluding Atlantic City, the top five activities are relatively the same except Gambling drops to 27th place in 2022:

1. Beach/Waterfront

2. Shopping

3. Culinary/Dining

4. Visiting Friends/Relatives

5. Birthday Celebrations

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 (3.6 times as high)
- Beach/Waterfront (2.6 times)
- Water Sports (2.2 times)
- Nightlife (2.1 times)
- Boating/Sailing (2.0 times)
- Festivals/Fairs (2.0 times)
- Reunion/Graduation (2.0 times)
- Live Music (1.9 times)
- Theme/Water Parks (1.8 times)

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

- Water Sports (2.8 times)
- Reunion/Graduation (2.5 times)
- Beach/Waterfront (2.4 times as high)
- Theme/Water Parks (2.3 times)
- Show: Boat, Car, Home (2.2 times)
- Festivals/Fairs (1.9 times)
- Boating/Sailing (1.7 times)
- Other Personal Celebration (1.7 times)

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 higher satisfaction (8.93 average rating) with their New Jersey stay in 2022 than in 2021. 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 with 8.93 (New Jersey whole) and 8.89 (New Jersey w/o Atlantic City).

Overall Satisfaction
DAY LEISURE (%) STAYS (2022)

Poor (1-3)	Fair/Good (4-7)	Excellent (8-10)	

| 8.84 avg. | 8.93 avg. | 8.86 avg. | 8.89 avg. |

88	87	88	86
10	13	9	14
2021	2022	2021	2022
New Jersey		**NJ w/o Atlantic City**	
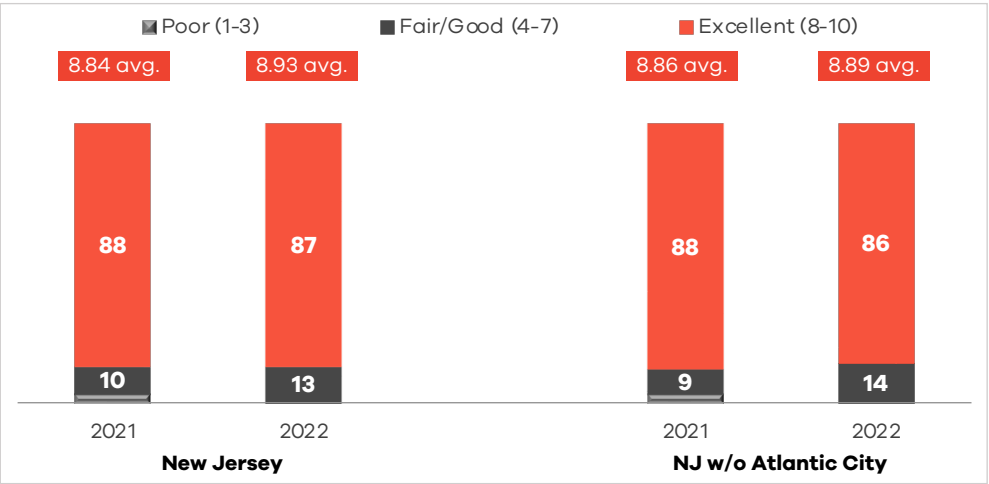
Value For The Money
DAY LEISURE (%) STAYS (2022)

Poor (1-3)	Fair/Good (4-7)	Excellent (8-10)	

| 8.75 avg. | 8.67 avg. | 8.83 avg. | 8.64 avg. |

83	80	84	81
16	19	15	18
2021	2022	2021	2022
New Jersey		**NJ w/o Atlantic City**	
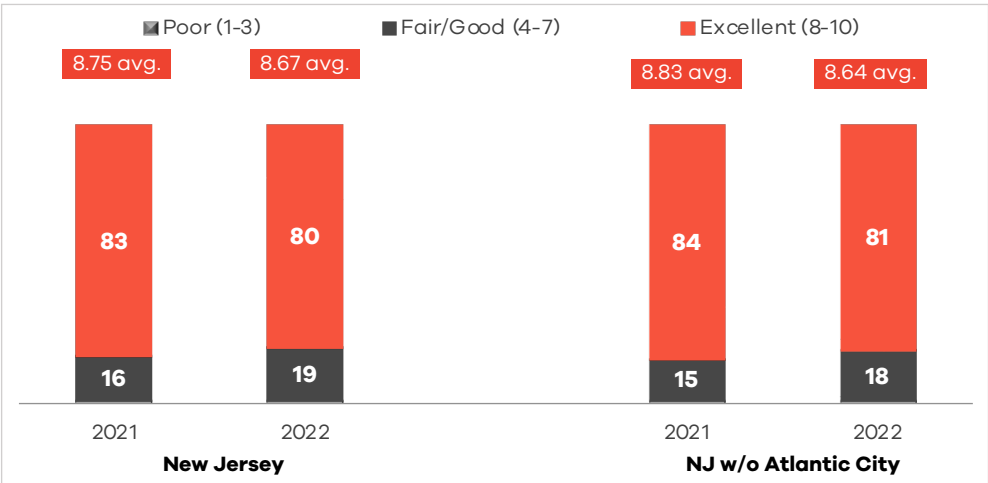
Overall, New Jersey's Day Leisure travelers report their highest ratings for Overall Satisfaction (8.93), followed by Feeling of Safety (8.80) and Likelihood to Recommend (8.80). For both New Jersey as a whole and New Jersey excluding Atlantic City, Overall Satisfaction increased but Value for the Money, Friendly/Helpful People, Feeling of Safety, and Likelihood to Recommend decreased from 2021.

When excluding Atlantic City, visitors rate New Jersey slightly lower in many performance attributes with the exception of Cleanliness of the Destination (slightly higher), Feeling of Safety (same rating), and Quality of Attractions (same rating).

Source: 2022 *PERFORMANCE/Monitor^SM*
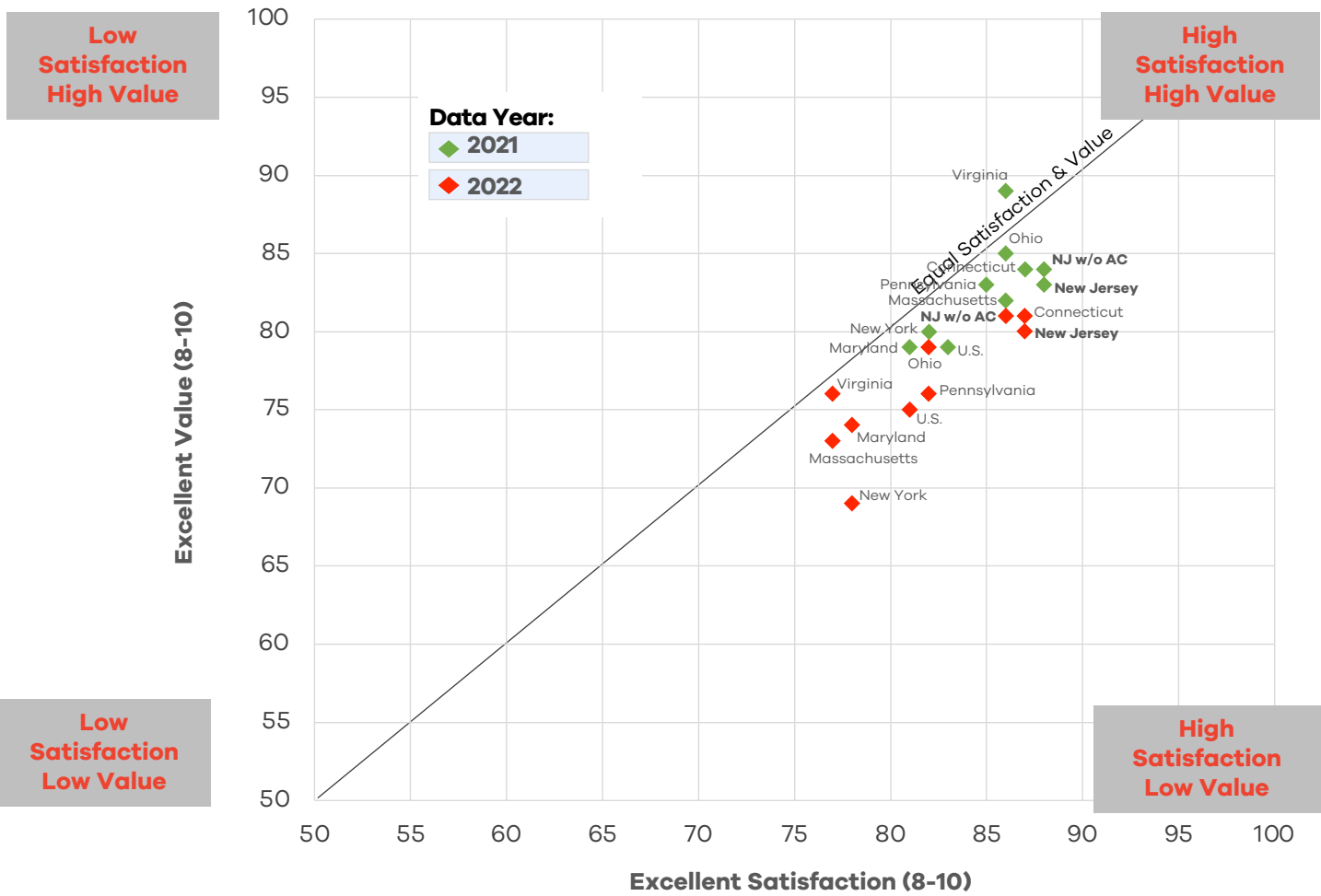
Satisfaction and Value ratings may be combined into a matrix which places each destination in the location where Satisfaction and Value intersect.

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.

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CHARTS & GRAPHS

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U.S. Travel Segments

Legend:
- Stays
- Person-Stays
- Person-Days
- Direct Spending

Business
- Stays: 20%
- Person-Stays: 16%
- Person-Days: 12%
- Direct Spending: 18%

Leisure
- Stays: 80%
- Person-Stays: 84%
- Person-Days: 88%
- Direct Spending: 82%

Day
- Stays: 55%
- Person-Stays: 53%
- Person-Days: 20%
- Direct Spending: 20%

Night
- Stays: 45%
- Person-Stays: 47%
- Person-Days: 80%
- Direct Spending: 80%

Day Leisure
- Stays: 42%
- Person-Stays: 42%
- Person-Days: 16%
- Direct Spending: 15%
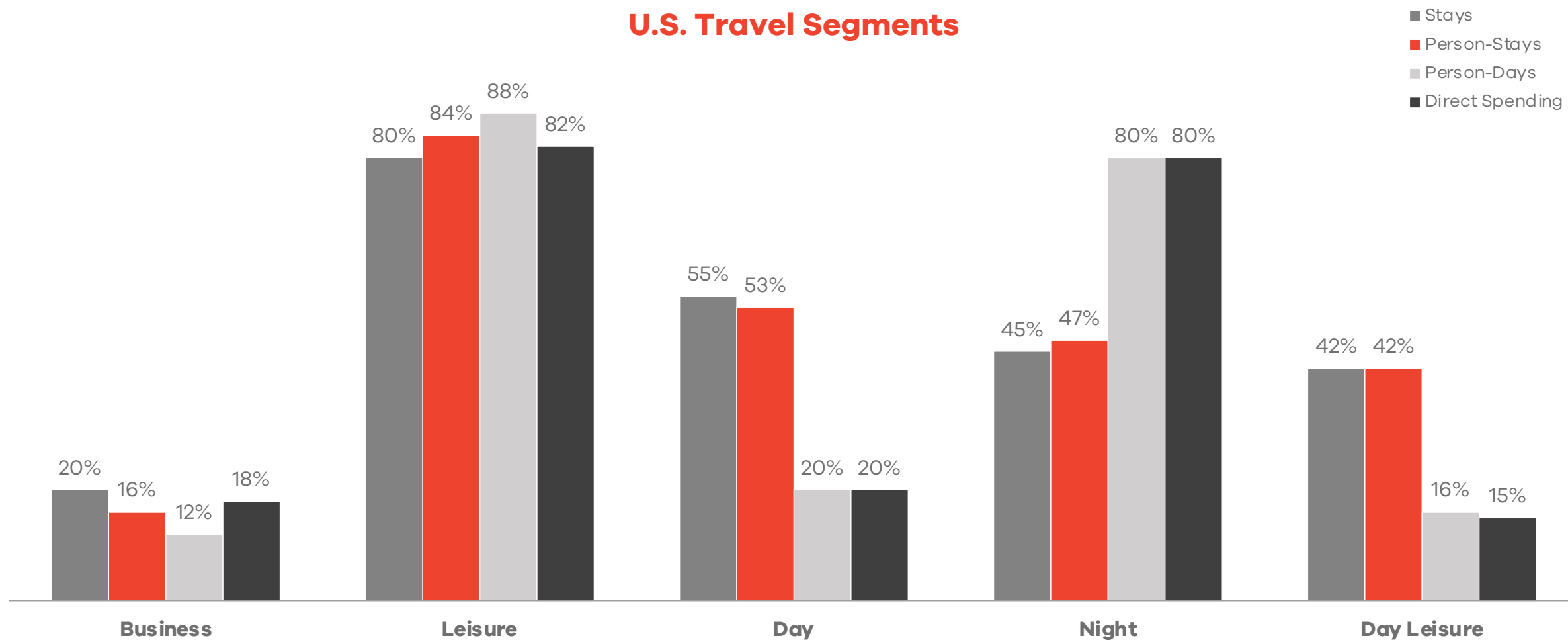
Segment: Total Volume (%)
Source: 2022 PERFORMANCE/Monitor[SM]

New Jersey Travel Segments

Legend:
- Stays
- Person-Stays
- Person-Days
- Direct Spending

Business: 15% / 9% / 7% / 10%
Leisure: 85% / 91% / 93% / 90%
Day: 58% / 55% / 23% / 22%
Night: 42% / 45% / 77% / 78%
Day Leisure: 47% / 49% / 20% / 19%

Segment: Total Volume (%)
Source: 2022 *PERFORMANCE/Monitor*[SM]

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New Jersey Person-Stays Volume

Legend:
- ■ Night Business
- ■ Day Business
- ■ Night Leisure
- ■ Day Leisure

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Total	87.8	91.4	93.5	97.3	101.9	110.0	114.5	83.6	90.6	111.5
Day Leisure	38.1	39.2	40.0	42.0	45.0	49.5	51.8	38.2	42.4	54.1
Night Leisure	37.5	39.4	40.8	42.8	45.0	47.9	49.8	35.9	39.7	46.9
Day Business	8.1	8.6	8.7	8.6	8.2	8.9	9.3	7.2	6.3	7.7
Night Business	4.2	4.2	4.0	3.9	3.6	3.7	3.6	2.3	2.3	2.8
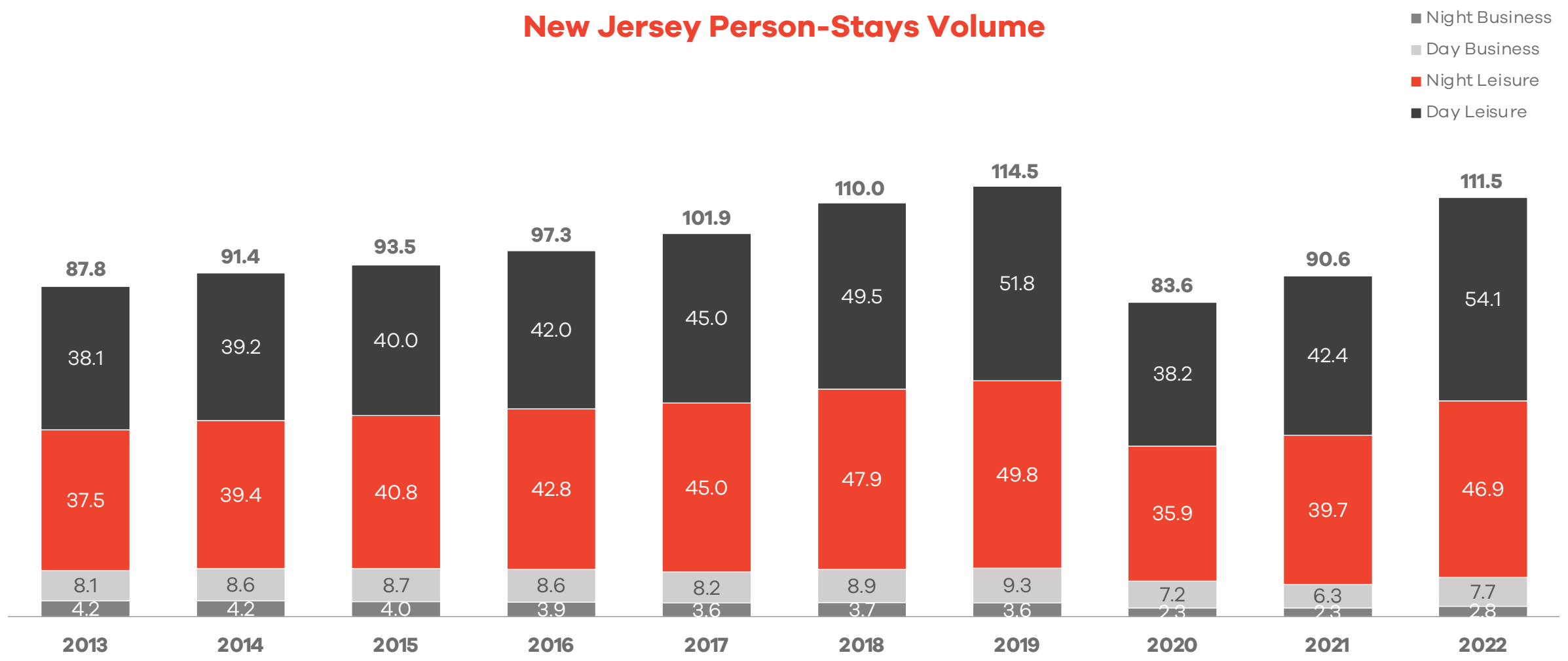
Segment: Total Volume (in Millions)
Source: 2022 *PERFORMANCE/Monitor*^{SM}

Visitor Profile / Volume

	New Jersey									U.S.
	14/13	**15/14**	**16/15**	**17/16**	**18/17**	**19/18**	**20/19**	**21/20**	**22/21**	**22/21**
Total	4.1%	2.3%	4.0%	4.7%	8.0%	4.1%	-27.0%	8.4%	23.0%	20.6%
Business	4.6%	-0.4%	-1.8%	-5.4%	6.5%	2.5%	-26.7%	-9.9%	22.7%	30.6%
Leisure	4.0%	2.8%	4.9%	6.2%	8.2%	4.3%	-27.0%	10.7%	23.0%	18.9%
Day	3.6%	2.0%	3.8%	5.1%	9.8%	4.6%	-25.7%	7.2%	27.0%	24.5%
Night	4.6%	2.7%	4.3%	4.2%	6.0%	3.5%	-28.4%	9.8%	18.4%	16.5%
Day Business	7.0%	1.4%	-1.1%	-4.8%	8.2%	4.9%	-22.9%	-12.7%	22.6%	38.2%
Day Leisure	2.8%	2.2%	4.9%	7.1%	10.1%	4.6%	-26.2%	10.9%	27.6%	21.6%
Night Business	0.0%	-4.2%	-3.2%	-6.7%	2.6%	-3.2%	-36.6%	-0.9%	23.0%	18.9%
Night Leisure	5.1%	3.4%	5.0%	5.2%	6.3%	4.0%	-27.8%	10.5%	18.1%	16.2%

Segment: Total Volume Person-Stays (% change)
Source: 2022 PERFORMANCE/Monitor[SM]

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New Jersey Direct Spending Volume

Legend:
- Night Business
- Day Business
- Night Leisure
- Day Leisure

2013 — $18,565.9
- 2,870.7
- 12,794.6
- 592.7
- 2,307.9

2014 — $19,258.1
- 2,956.3
- 13,397.6
- 611.5
- 2,292.8

2015 — $20,168.4
- 3,058.0
- 14,227.9
- 589.0
- 2,293.5

2016 — $20,955.58
- 3,163.1
- 14,970.2
- 561.8
- 2,260.6

2017 — $21,617.8
- 3,281.7
- 15,561.8
- 533.3
- 2,240.9

2018 — $23,188.3
- 3,628.3
- 16,727.5
- 592.3
- 2,240.2

2019 — $24,166.7
- 3,848.8
- 17,504.4
- 622.0
- 2,191.6

2020 — $17,570.8
- 3,005.8
- 12,633.6
- 511.9
- 1,419.5

2021 — $20,364.5
- 3,590.5
- 14,774.5
- 540.3
- 1,459.2

2022 — $25,978.1
- 4,889.6
- 18,440.9
- 742.0
- 1,905.6

Segment: Direct Spending (in $ Millions)
Source: 2022 PERFORMANCE/Monitor[SM]

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	New Jersey									U.S.
	14/13	15/14	16/15	17/16	18/17	19/18	20/19	21/20	22/21	22/21
Total	3.7%	4.7%	3.9%	3.2%	7.3%	4.2%	-27.3%	15.9%	27.6%	21.9%
Business	0.1%	-0.7%	-2.1%	-1.7%	2.1%	-0.7%	-31.4%	3.5%	32.4%	3.2%
Leisure	4.4%	5.7%	4.9%	3.9%	8.0%	4.9%	-26.8%	17.4%	27.0%	27.1%
Day	3.0%	2.2%	2.1%	2.4%	10.6%	5.9%	-21.3%	17.4%	36.3%	17.9%
Night	3.9%	5.3%	4.3%	3.3%	6.5%	3.8%	-28.7%	15.5%	25.3%	22.9%
Day Business	3.2%	-3.7%	-4.6%	-5.1%	11.1%	5.0%	-17.7%	5.6%	37.3%	9.0%
Day Leisure	3.0%	3.4%	3.4%	3.8%	10.6%	6.1%	-21.9%	19.5%	36.2%	21.4%
Night Business	-0.7%	0.0%	-1.4%	-0.9%	0.0%	-2.2%	-35.2%	2.8%	30.6%	1.1%
Night Leisure	4.7%	6.2%	5.2%	4.0%	7.5%	4.6%	-27.8%	16.9%	24.8%	28.4%

Segment: Direct Spending (% change)
Source: 2022 PERFORMANCE/Monitor[SM]

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

Legend:
- Stays
- Person-Stays
- Person-Days
- Stay-Dollars

New Jersey: 2.2%, 2.3%, 2.3%, 2.4%
NJ w/o Atl City: 1.8%, 1.8%, 1.8%, 1.5%
New York: 6.8%, 6.7%, 6.7%, 7.6%
Pennsylvania: 3.5%, 3.6%, 3.6%, 3.4%
Maryland: 1.6%, 1.5%, 1.5%, 1.5%
Virginia: 1.6%, 1.8%, 1.8%, 1.4%
Connecticut: 1.0%, 1.1%, 1.0%, 0.8%
Massachusetts: 2.6%, 2.3%, 2.3%, 2.3%
Ohio: 2.7%, 2.9%, 2.9%, 2.5%
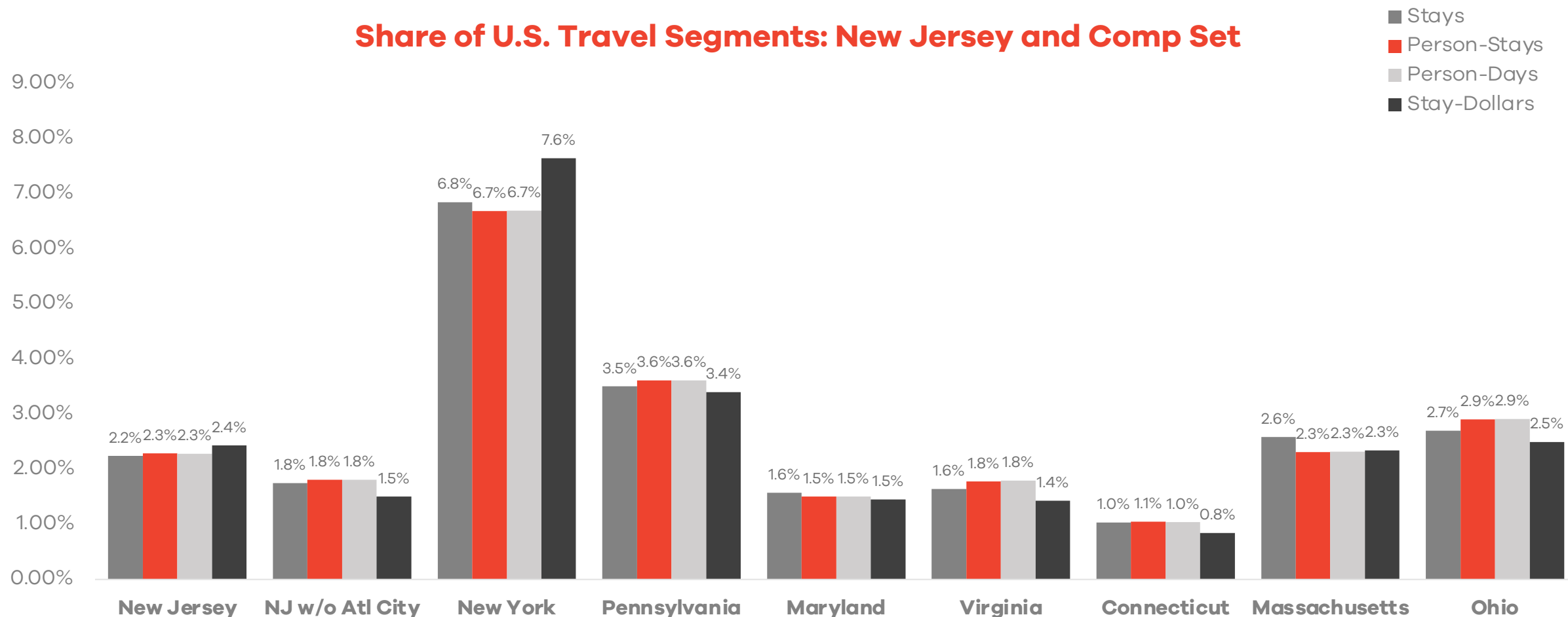
Segment: Day Leisure (%) ● n=897 household count
Source: 2022 *PERFORMANCE/Monitor*[SM]

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

■ 18-34 years   ■ 35-54 years   ■ 55 + years

Average

Average		18-34 years	35-54 years	55 + years
48	U.S.	28	34	39
47	New Jersey	34	28	38
45	NJ w/o Atl City	39	27	34
49	Comp Set	24	35	41
48	New York	25	36	39
51	Pennsylvania	21	33	46
51	Maryland	21	32	47
49	Virginia	26	35	39
51	Connecticut	19	36	45
50	Massachusetts	25	34	40
47	Ohio	26	39	35

Segment: Day Leisure Person-Stays (%) ● n=897 household count
Source: 2022 *PERFORMANCE/Monitor*[SM]

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Racial Distribution: U.S., New Jersey, and Comp Set
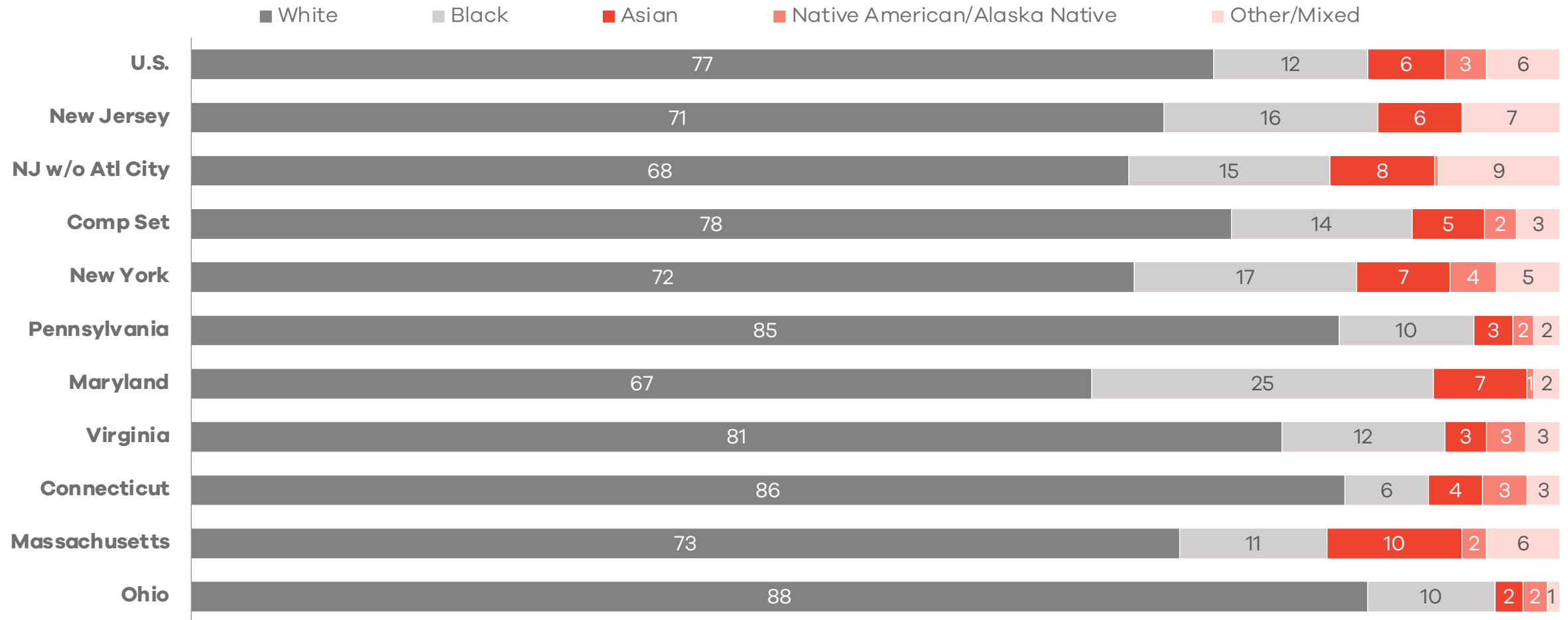
■ White ■ Black ■ Asian ■ Native American/Alaska Native ■ Other/Mixed

Region	White	Black	Asian	Native American/Alaska Native	Other/Mixed
U.S.	77	12	6	3	6
New Jersey	71	16	6		7
NJ w/o Atl City	68	15	8		9
Comp Set	78	14	5	2	3
New York	72	17	7	4	5
Pennsylvania	85	10	3	2	2
Maryland	67	25	7	1	2
Virginia	81	12	3	3	3
Connecticut	86	6	4	3	3
Massachusetts	73	11	10	2	6
Ohio	88	10	2	2	1

Segment: Day Leisure Person-Stays (%) ● n=889 household count

Source: 2022 PERFORMANCE/Monitor[SM]

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Ethnic Origin: U.S., New Jersey and Comp Set
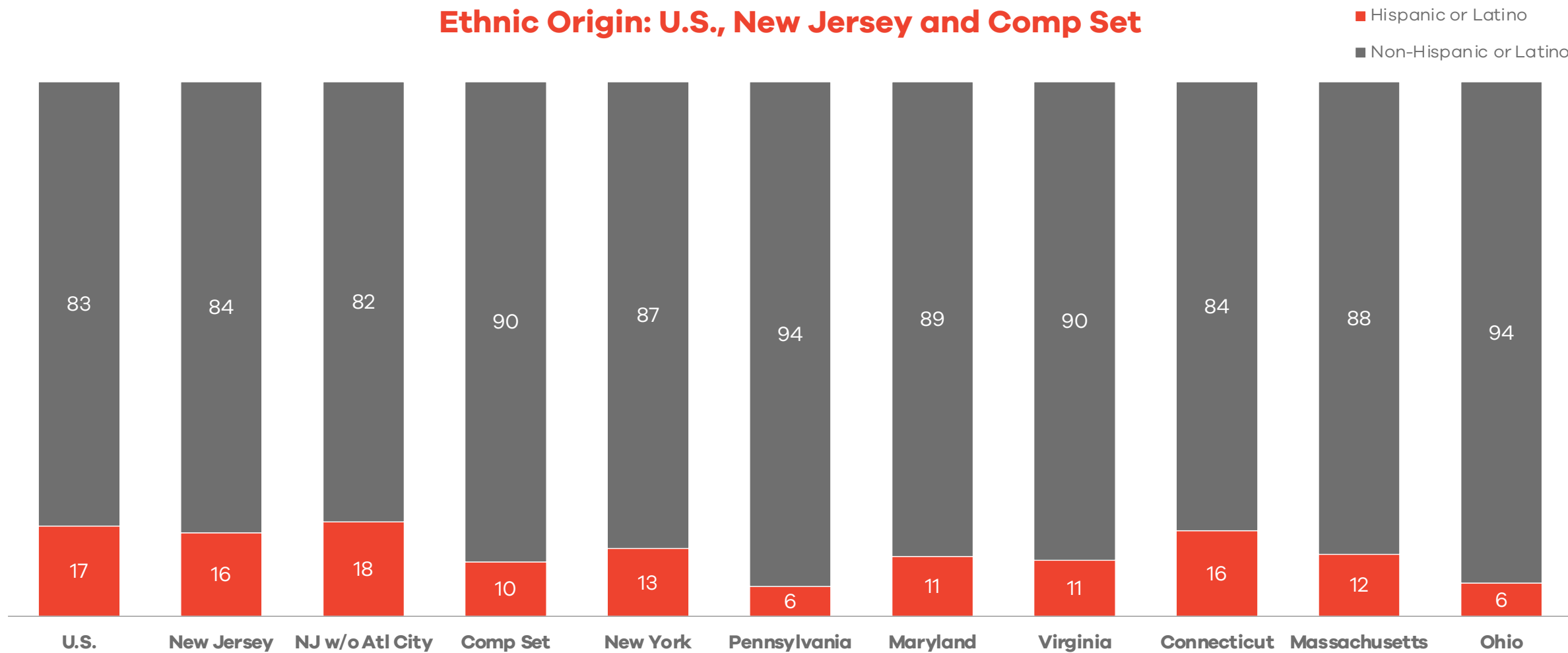
■ Hispanic or Latino
■ Non-Hispanic or Latino

	U.S.	New Jersey	NJ w/o Atl City	Comp Set	New York	Pennsylvania	Maryland	Virginia	Connecticut	Massachusetts	Ohio
Non-Hispanic or Latino	83	84	82	90	87	94	89	90	84	88	94
Hispanic or Latino	17	16	18	10	13	6	11	11	16	12	6

Segment: Day Leisure Person-Stays (%) ● n=889 household count
Source: 2022 *PERFORMANCE/Monitor*[SM]

MMGY Travel Intelligence

Sexual Orientation Distribution: U.S., New Jersey, and Comp Set
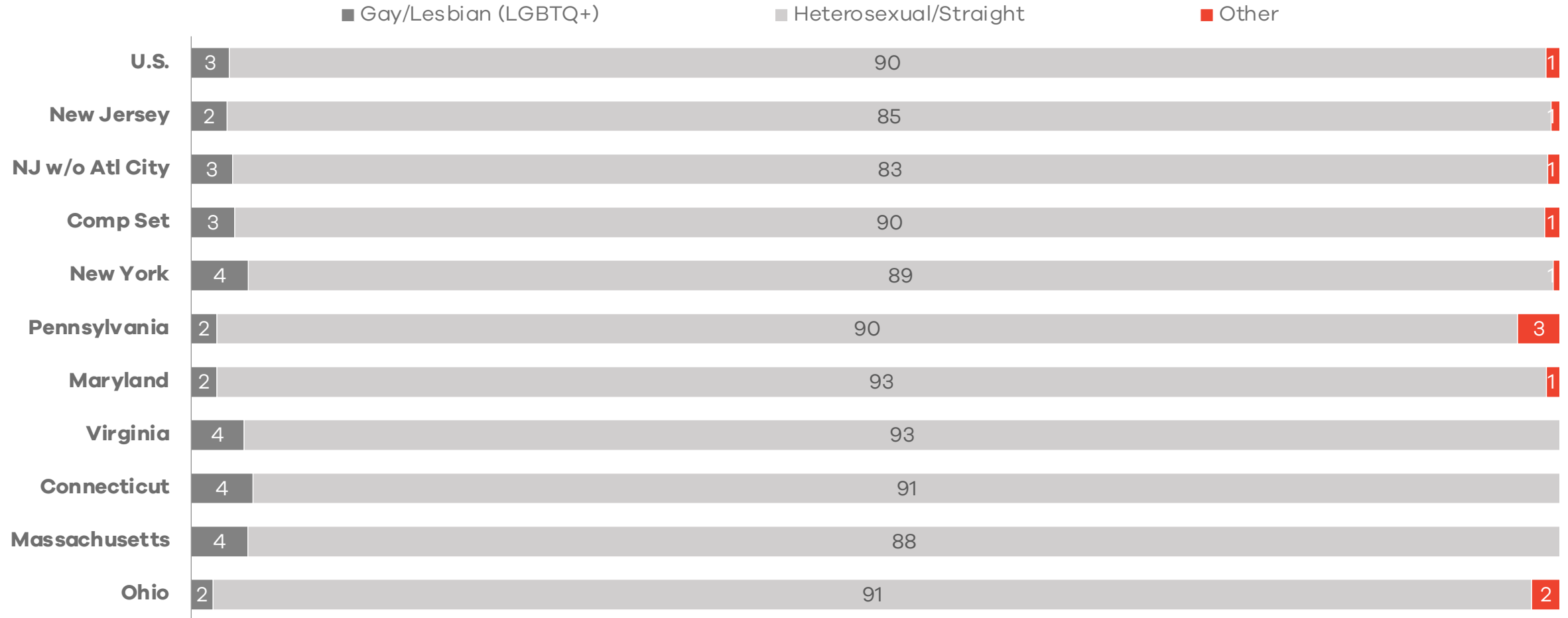
■ Gay/Lesbian (LGBTQ+)　　　■ Heterosexual/Straight　　　■ Other

	Gay/Lesbian (LGBTQ+)	Heterosexual/Straight	Other
U.S.	3	90	1
New Jersey	2	85	1
NJ w/o Atl City	3	83	1
Comp Set	3	90	1
New York	4	89	1
Pennsylvania	2	90	3
Maryland	2	93	1
Virginia	4	93	
Connecticut	4	91	
Massachusetts	4	88	
Ohio	2	91	2

Segment: Day Leisure Person-Stays (%) ● n=897 household count
Source: 2022 PERFORMANCE/Monitor^{SM}

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

Average

Legend: ■ Under $50,000 ■ $50,000 – $74,999 ■ $75,000-$99,999 ■ $100,000-$149,999 ■ $150,000+

Average	Region	Under $50,000	$50,000 – $74,999	$75,000-$99,999	$100,000-$149,999	$150,000+
$96,627	U.S.	32	18	14	18	18
$121,024	New Jersey	20	18	13	23	26
$109,035	NJ w/o Atl City	23	19	14	24	22
$103,849	Comp Set	30	16	14	19	22
$105,409	New York	29	16	14	21	21
$102,857	Pennsylvania	32	17	16	14	22
$106,870	Maryland	29	14	14	21	22
$109,806	Virginia	30	16	14	18	21
$112,585	Connecticut	27	13	12	25	22
$114,763	Massachusetts	24	19	11	17	31
$84,375	Ohio	39	18	13	18	12

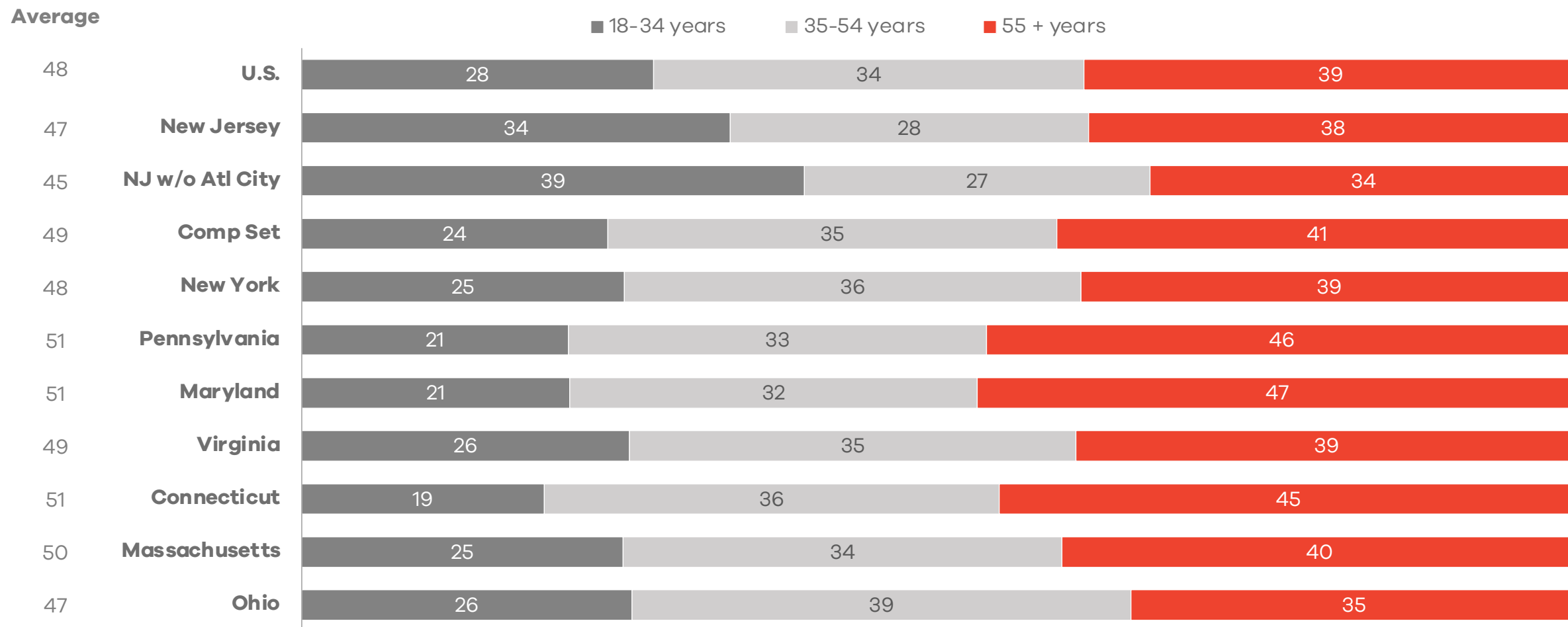Segment: Day Leisure Person-Stays (%) ● n=882 household count
Source: 2022 *PERFORMANCE/Monitor*[SM]

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

Legend: ■ Young & Free ■ Young Family ■ Maturing & Free ■ Moderate Family ■ Affluent Family ■ Moderate Mature ■ Affluent Mature

	Young & Free	Young Family	Maturing & Free	Moderate Family	Affluent Family	Moderate Mature	Affluent Mature
U.S.	13	14	16	7	11	12	23
New Jersey	18	16	14	3	11	5	28
NJ w/o Atl City	20	19	13	3	11	6	23
Comp Set	12	12	16	6	13	13	25
New York	12	13	16	7	14	12	24
Pennsylvania	11	10	15	6	13	16	27
Maryland	10	11	18	2	13	16	27
Virginia	11	15	13	6	16	10	23
Connecticut	9	11	17	9	10	10	32
Massachusetts	16	9	21	3	11	12	27
Ohio	15	11	14	11	14	13	18

Segment: Day Leisure Person-Stays (%) ● n=897 household count
Source: 2022 PERFORMANCE/Monitor^SM

MMGY Travel Intelligence

Traveler Generation Distribution: U.S., New Jersey, and Comp Set
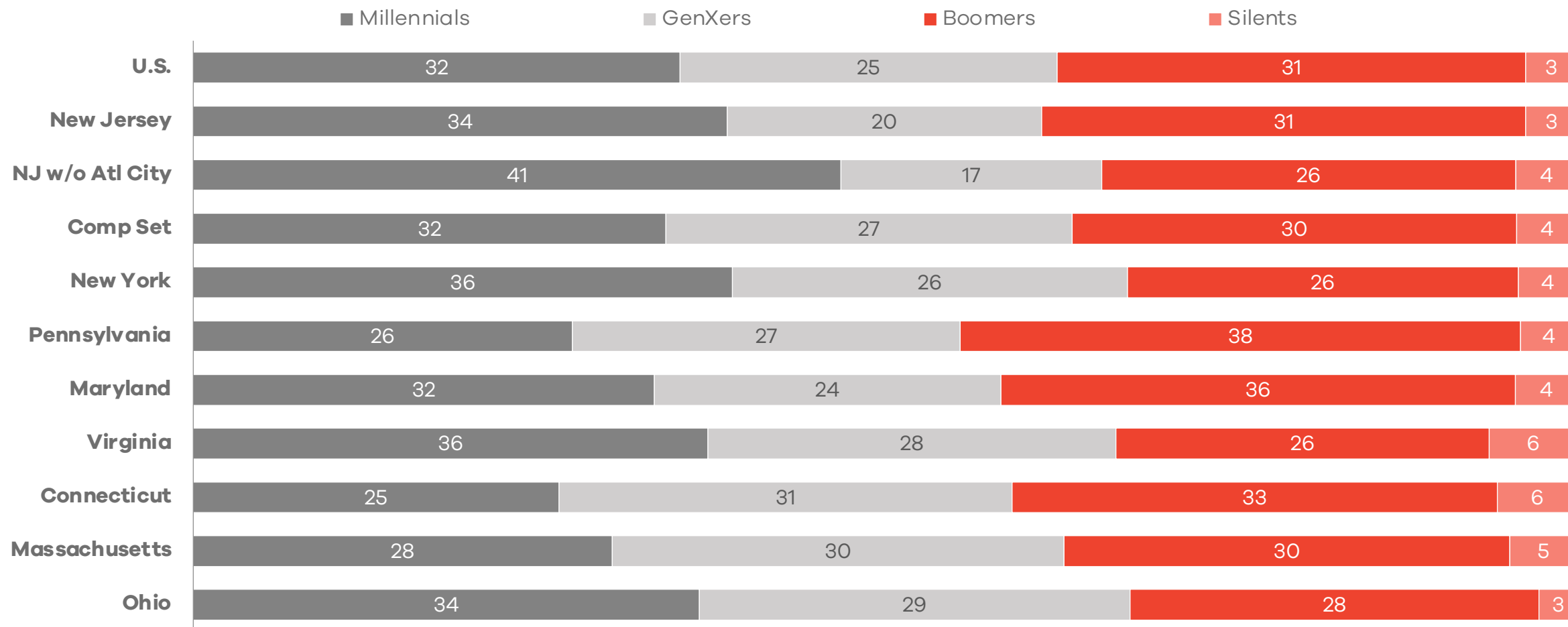
■ Millennials   ■ GenXers   ■ Boomers   ■ Silents

	Millennials	GenXers	Boomers	Silents
U.S.	32	25	31	3
New Jersey	34	20	31	3
NJ w/o Atl City	41	17	26	4
Comp Set	32	27	30	4
New York	36	26	26	4
Pennsylvania	26	27	38	4
Maryland	32	24	36	4
Virginia	36	28	26	6
Connecticut	25	31	33	6
Massachusetts	28	30	30	5
Ohio	34	29	28	3

Segment: Day Leisure Person-Stays (%) ● n=897 household count
Source: 2022 PERFORMANCE/Monitor^{SM}

MMGY Travel Intelligence

New Jersey Traveler Generation Comparison

■ Stays Based
■ Stay-Dollars Based

Millennials 24% 26%
GenXers 18% 20%
Boomers 46% 49%
Silents 7% 3%
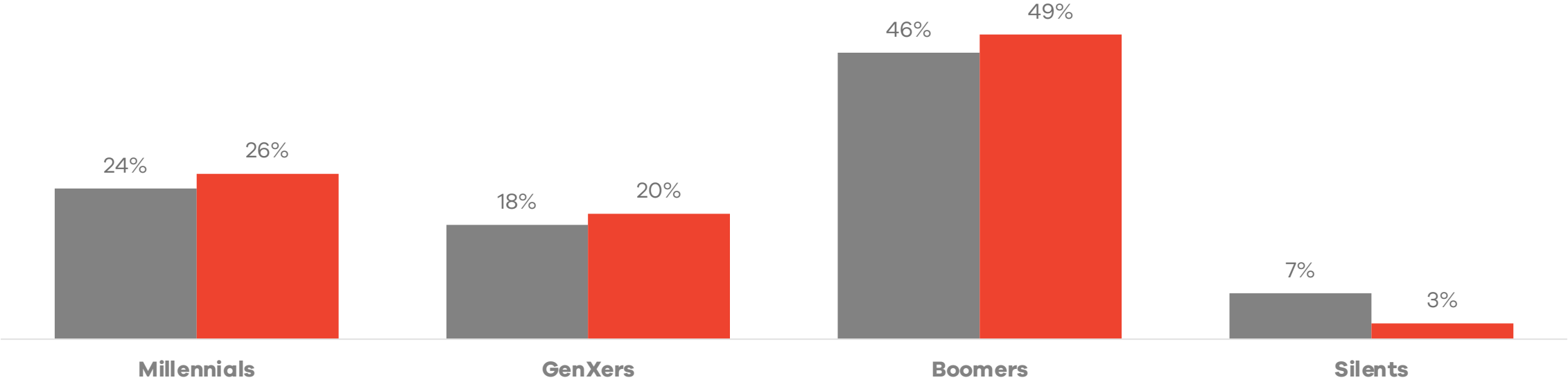
Segment: Day Leisure (%) ● n=1,949 household count
Source: 2020-2022 PERFORMANCE/Monitor^SM

Origin Divisions For Travel To New Jersey
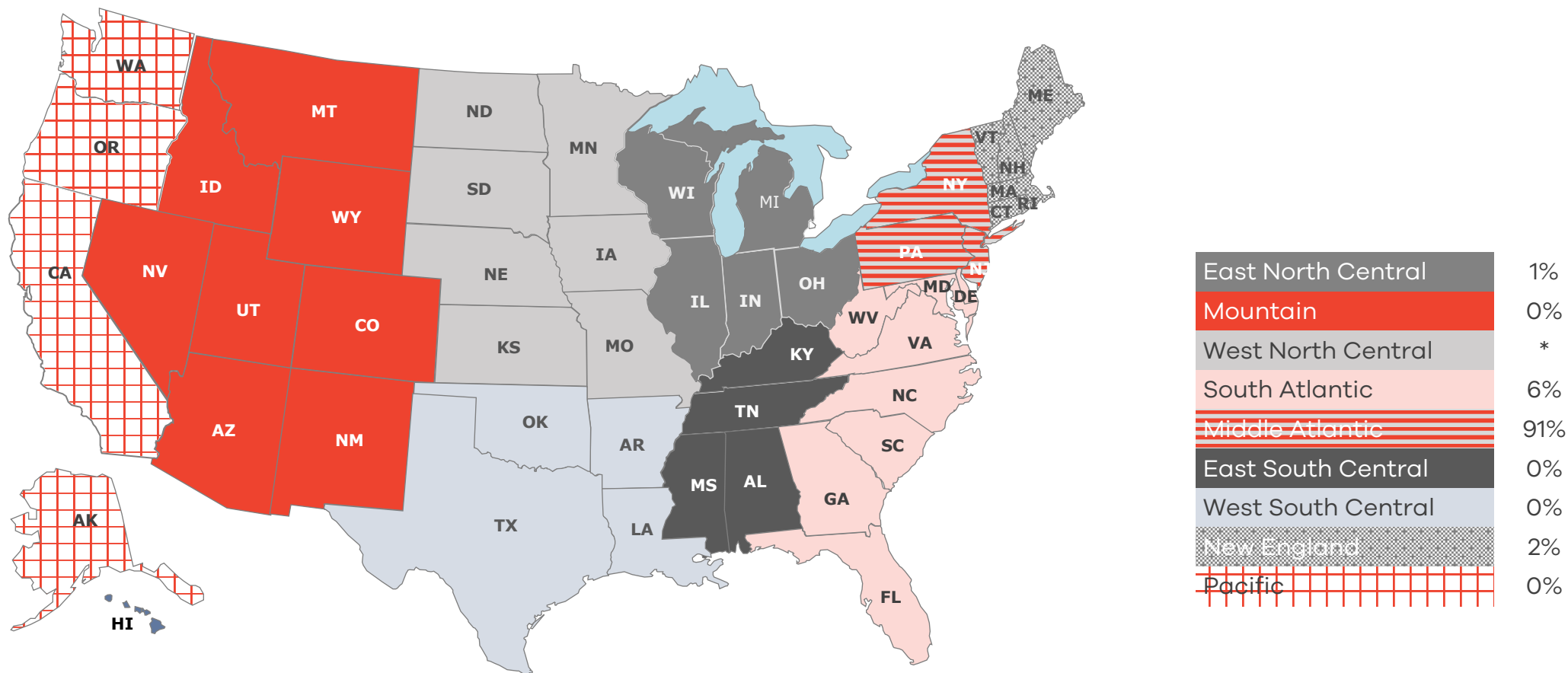
East North Central	1%
Mountain	0%
West North Central	*
South Atlantic	6%
Middle Atlantic	91%
East South Central	0%
West South Central	0%
New England	2%
Pacific	0%

Segment: Day Leisure Person-Stays (%) ● n=893 household count

Source: 2022 *PERFORMANCE/Monitor*[SM]

MMGY Travel Intelligence

Top Origin States For Travel To New Jersey
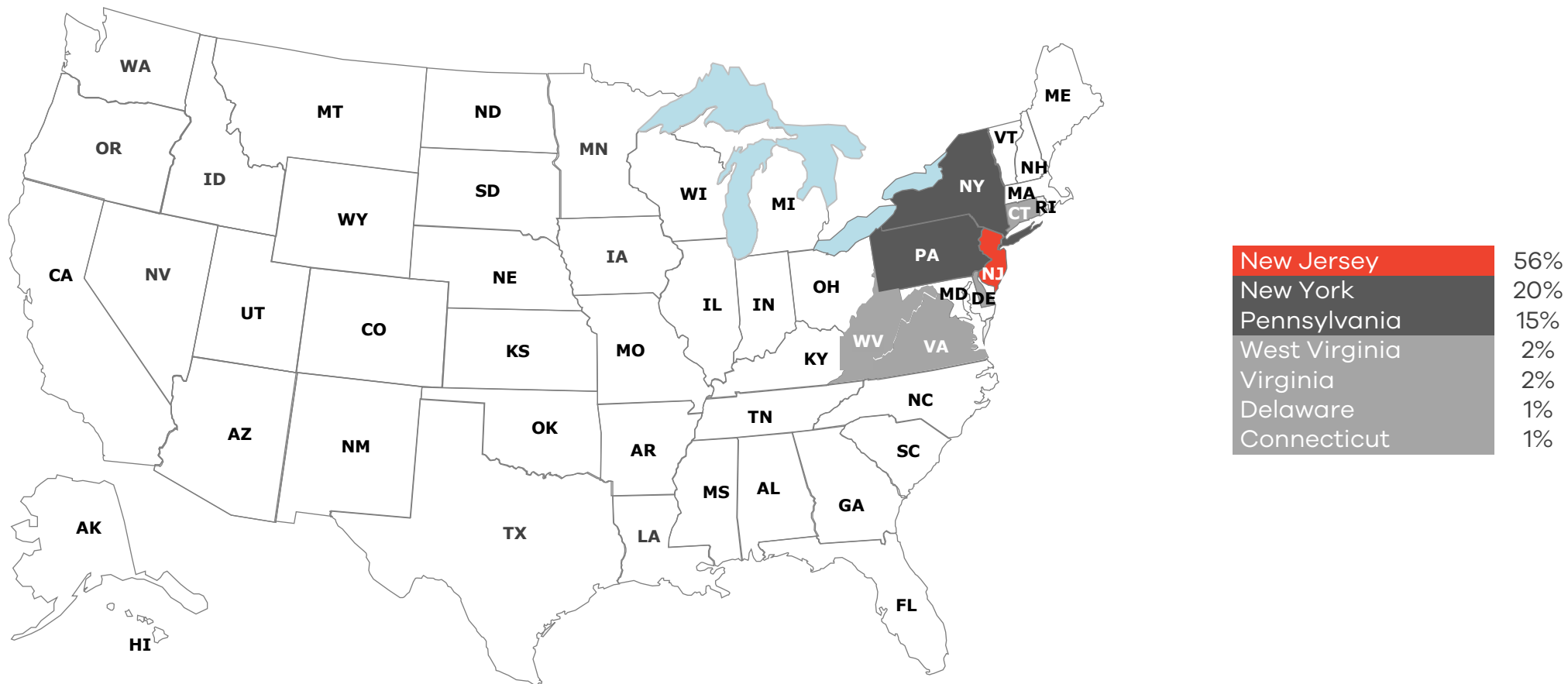
New Jersey	56%
New York	20%
Pennsylvania	15%
West Virginia	2%
Virginia	2%
Delaware	1%
Connecticut	1%

Segment: Day Leisure Person-Stays (%) ● n=893 household count
Source: 2022 PERFORMANCE/Monitor[SM]

Visitor Profile / Trip Origin

	U.S.	New Jersey	NJ w/o Atl City	Comp Set	New York	Pennsylvania	Maryland	Virginia	Connecticut	Massachusetts	Ohio
New York, NY	5.9%	59.6%	64.6%	21.3%	49.2%	10.9%	2.5%	3.8%	23.9%	8.2%	0.2%
Philadelphia, PA	2.4%	29.8%	25.3%	7.7%	6.4%	24.1%	9.1%	1.0%	1.8%	0.5%	1.3%
Charleston-Huntington, WV	0.5%	2.1%	0.3%	0.7%	*	0.8%	*	0.3%	0.0%	0.0%	3.2%
Wilkes Barre-Scranton, PA	0.4%	1.3%	1.4%	2.0%	1.1%	8.5%	0.4%	*	0.0%	*	*
Roanoke-Lynchburg, VA	0.3%	0.9%	1.1%	1.2%	0.1%	0.2%	0.1%	12.2%	0.0%	0.0%	0.1%
Top 5 Sum	9.5%	93.7%	92.7%	32.9%	56.8%	44.5%	12.1%	17.3%	25.7%	8.7%	4.8%

Segment: Day Leisure Person-Stays (%) ● n=892 household count
Source: 2022 *PERFORMANCE/Monitor*[SM]

MM GY Travel Intelligence

New Jersey Origin DMA Comparison

■ Stays Based
■ Stay-Dollars Based

New York, NY
- 54.6 (Stays Based)
- 45.2 (Stay-Dollars Based)

Philadelphia, PA
- 28.0 (Stays Based)
- 29.9 (Stay-Dollars Based)

Pittsburgh, PA
- 3.8 (Stays Based)
- 12.6 (Stay-Dollars Based)

Charleston-Huntington, WV
- 0.5 (Stays Based)
- 2.7 (Stay-Dollars Based)

Hartford & New Haven, CT
- 1.9 (Stays Based)
- 2.1 (Stay-Dollars Based)

Wilkes Barre-Scranton, PA
- 1.7 (Stays Based)
- 1.1 (Stay-Dollars Based)

Baltimore, MD
- 0.5 (Stays Based)
- 0.4 (Stay-Dollars Based)

Segment: Day Leisure (%) ● n=1,936 household count
Source: 2020-2022 *PERFORMANCE/Monitor*[SM]

Main Mode of Transportation: U.S., New Jersey, and Comp Set
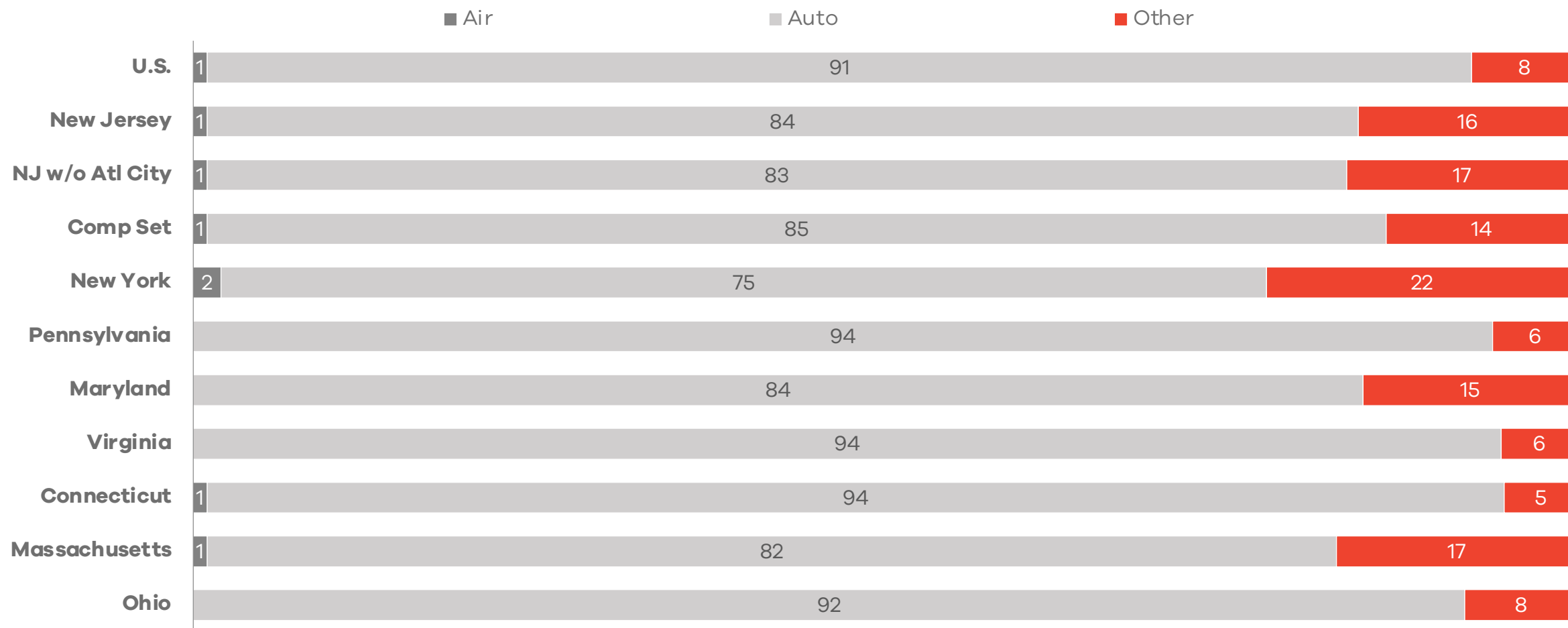
■ Air   ■ Auto   ■ Other

Region	Air	Auto	Other
U.S.	1	91	8
New Jersey	1	84	16
NJ w/o Atl City	1	83	17
Comp Set	1	85	14
New York	2	75	22
Pennsylvania		94	6
Maryland		84	15
Virginia		94	6
Connecticut	1	94	5
Massachusetts	1	82	17
Ohio		92	8

Segment: Day Leisure Person-Stays (%) ● n=892 household count
Source: 2022 *PERFORMANCE/Monitor*[SM]

MMGY Travel Intelligence

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

■ 100 miles or less   ■ 101–200 miles   ■ 201–300 miles   ■ 301–500 miles   ■ 501+ miles

	100 miles or less	101–200 miles	201–300 miles	301–500 miles	501+ miles
U.S.	71	16	5	4	4
New Jersey	84	10	1	4	1
NJ w/o Atl City	86	9	1	3	1
Comp Set	74	15	5		3
New York	67	15	7		6
Pennsylvania	76	14	6	2	2
Maryland	82	13	1	1	3
Virginia	73	15	6	4	1
Connecticut	90	8		0	2
Massachusetts	81	10	3	4	3
Ohio	72	21	4	2	2
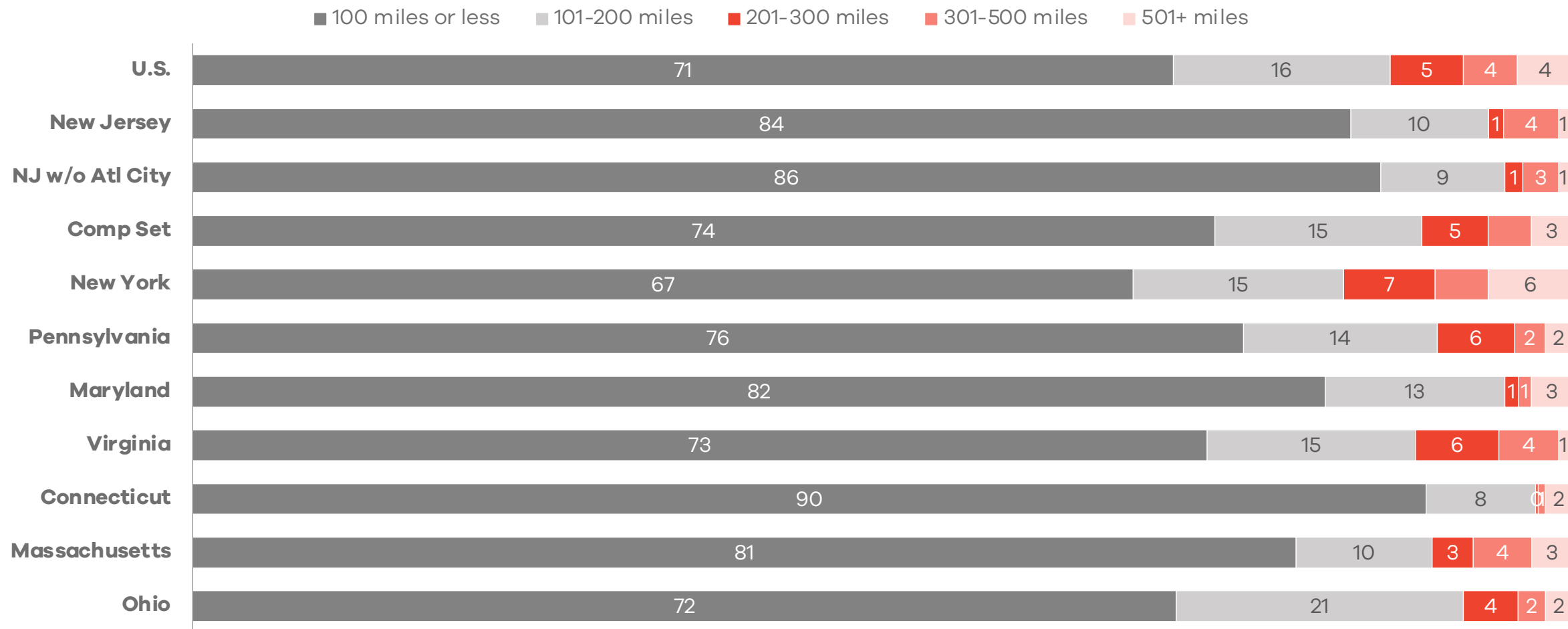
Segment: Day Leisure Person-Stays (%) ● n=774 household count
Source: 2022 PERFORMANCE/Monitor^{SM}

MMGY Travel Intelligence

New Jersey Month Trip Started

Oct '21	Nov '21	Dec '21	Jan '22	Feb '22	Mar '22	Apr '22	May '22	Jun '22	Jul '22	Aug '22	Sep '22
13	7	6	2	1	5	8	6	12	12	22	8

Segment: Day Leisure Person-Stays (%) ● n=897 household count
Source: 2022 PERFORMANCE/Monitor^{SM}

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

■ Fourth Quarter '21   ■ First Quarter '22   ■ Second Quarter '22   ■ Third Quarter '22

	Fourth Quarter '21	First Quarter '22	Second Quarter '22	Third Quarter '22
U.S.	30	15	25	30
New Jersey	26	8	26	41
NJ w/o Atl City	27	7	27	39
Comp Set	31	13	26	30
New York	30	9	25	37
Pennsylvania	35	15	25	26
Maryland	25	18	36	21
Virginia	29	17	29	26
Connecticut	26	9	30	35
Massachusetts	35	17	26	22
Ohio	31	17	22	30

Segment: Day Leisure Person-Stays (%) ● n=897 household count
Source: 2022 *PERFORMANCE/Monitor*[SM]
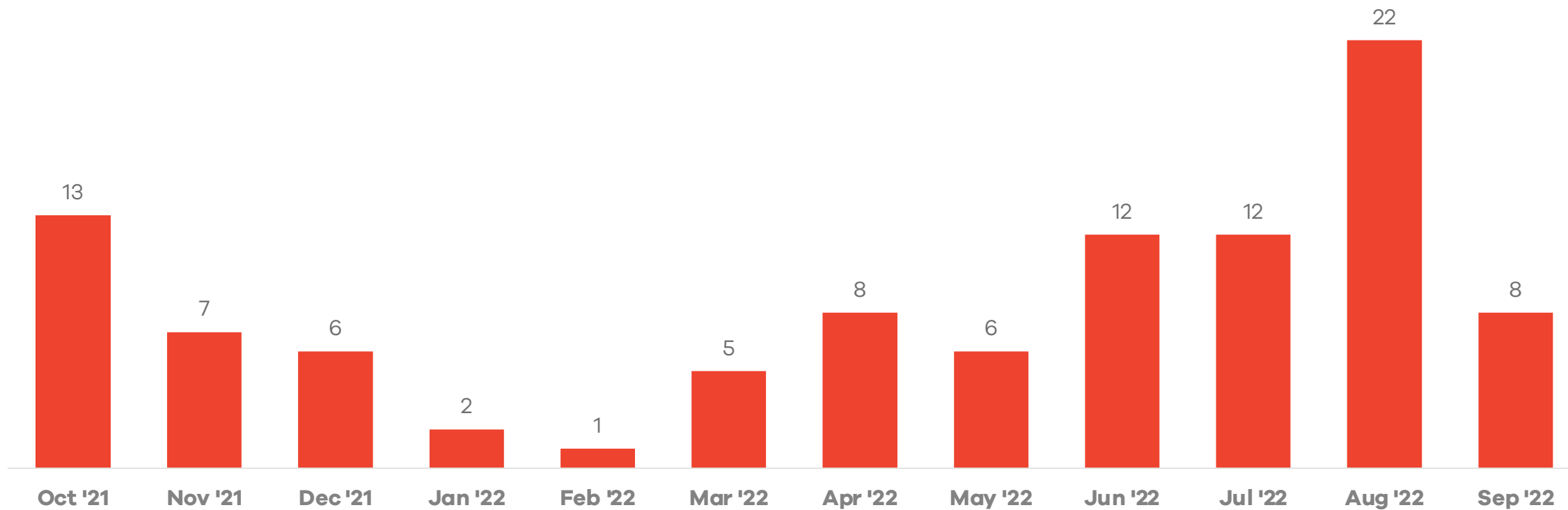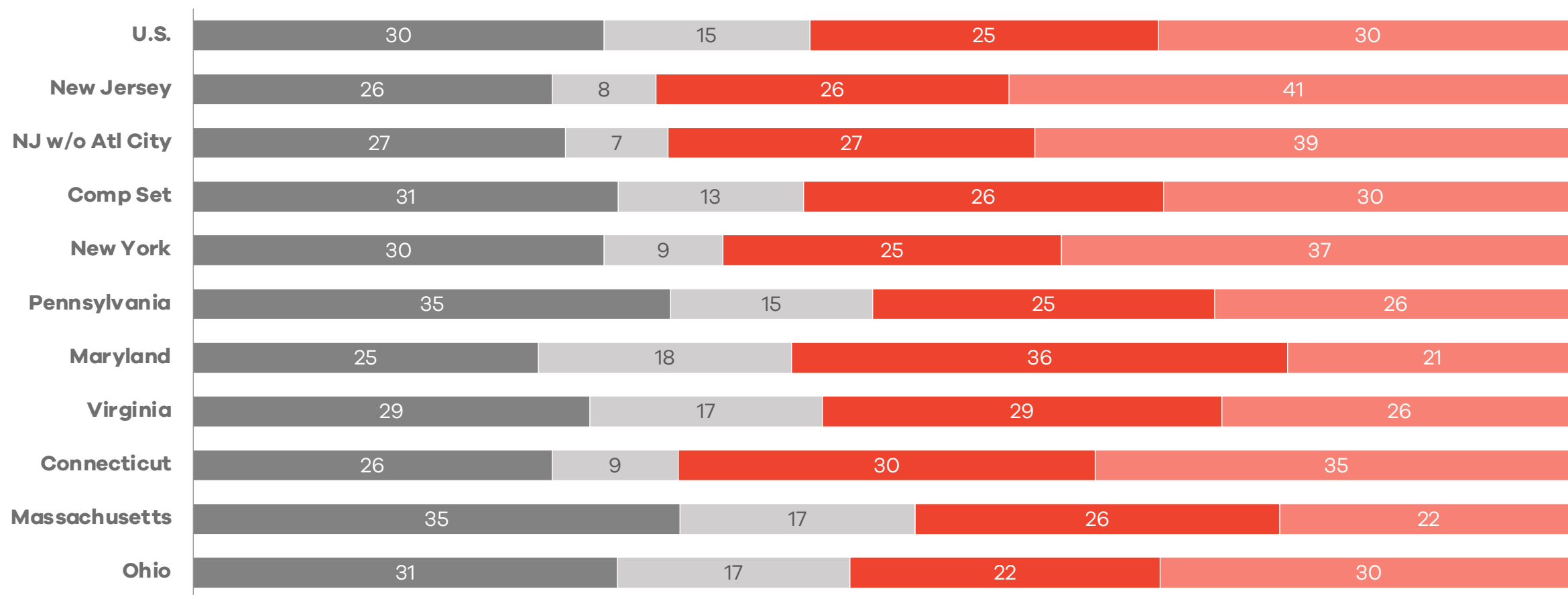
Trip Timing by Season: U.S., New Jersey, and Comp Set

■ Winter   ■ Spring   ■ Summer   ■ Fall

	Winter	Spring	Summer	Fall
U.S.	17	23	30	30
New Jersey	9	18	45	28
NJ w/o Atl City	7	18	43	31
Comp Set	18	24	29	29
New York	16	21	35	28
Pennsylvania	20	23	25	33
Maryland	19	35	24	23
Virginia	17	26	29	29
Connecticut	12	22	37	29
Massachusetts	20	28	23	29
Ohio	20	22	26	32

Segment: Day Leisure Person-Stays (%) ● n=897 household count
Source: 2022 PERFORMANCE/Monitor^SM

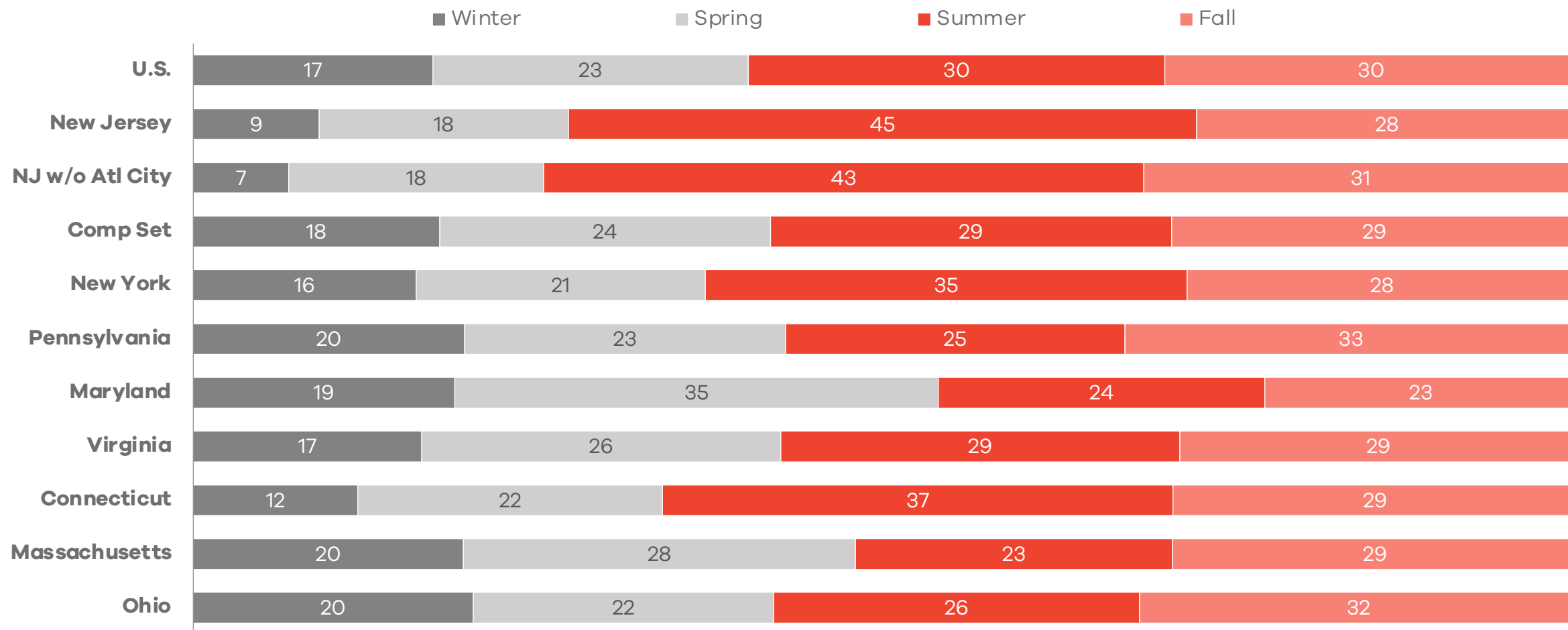**Purpose of Trip Distribution: U.S., New Jersey, and Comp Set**

Legend:
- Vacation/Getaway - Day Trip
- Visit Friends/Relatives
- Special Events
- Convention/Show/Conference
- Medical/Health Care
- Seminar/Class/Training
- Other Personal/Leisure

	Vacation/Getaway - Day Trip	Visit Friends/Relatives	Special Events	Convention/Show/Conference	Medical/Health Care	Seminar/Class/Training	Other Personal/Leisure
U.S.	22	32	14	2	6	1	23
New Jersey	33	28	14	1	4	1	19
NJ w/o Atl City	28	32	16	1	3	2	19
Comp Set	20	33	15	3	5	1	23
New York	22	37	14	3	5		19
Pennsylvania	19	29	15	2	5	1	30
Maryland	26	31	14	1	6		23
Virginia	20	39	14	2	6		19
Connecticut	26	30	9	5	5	1	24
Massachusetts	19	28	21	2	3		27
Ohio	16	32	18	2	6	1	26

Segment: Day Leisure Person-Stays (%) ● n=897 household count
Source: 2022 *PERFORMANCE/Monitor*[SM]

MMGY Travel Intelligence

New Jersey Purpose of Stay Comparison
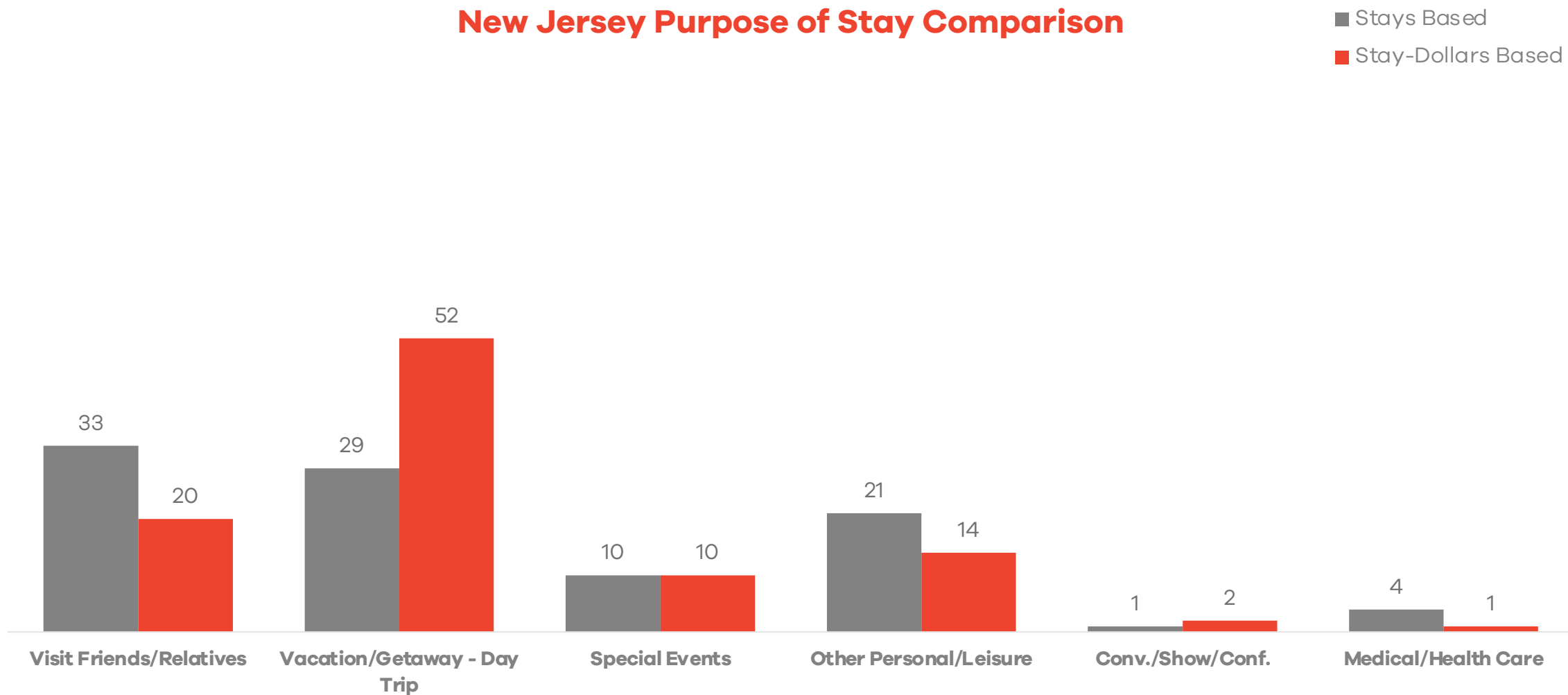
■ Stays Based
■ Stay-Dollars Based

	Visit Friends/Relatives	Vacation/Getaway - Day Trip	Special Events	Other Personal/Leisure	Conv./Show/Conf.	Medical/Health Care
Stays Based	33	29	10	21	1	4
Stay-Dollars Based	20	52	10	14	2	1

Segment: Day Leisure (%) ● n=1,949 household count
Source: 2020-2022 PERFORMANCE/Monitor[SM]

MMGY Travel Intelligence

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

■ 2021
■ 2022

	U.S.	New Jersey	NJ w/o Atl City	Comp Set	New York	Pennsylvania	Maryland	Virginia	Connecticut	Massachusetts	Ohio
2021	1.88	1.80	1.76	1.89	2.05	1.93	1.76	1.85	1.84	1.66	1.89
2022	1.91	1.94	1.97	1.90	1.86	1.97	1.83	2.07	1.94	1.71	2.04
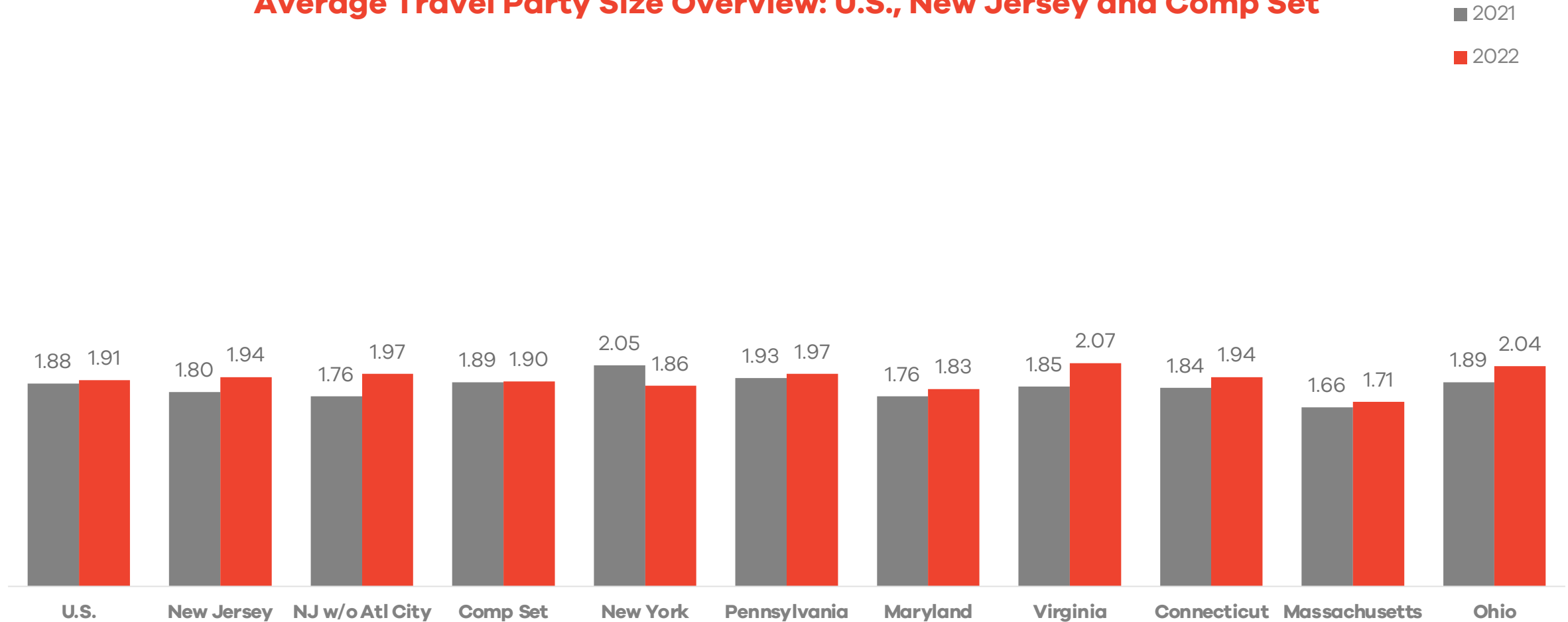
Segment: Day Leisure Stays (%) ● n=897 household count
Source: 2022 *PERFORMANCE/Monitor*[SM]

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

Average

■ Transportation ■ Food ■ Shopping ■ Entertainment ■ Miscellaneous

Average	Location	Transportation	Food	Shopping	Entertainment	Miscellaneous
$204.0	U.S.	26	27	24	16	7
$208.8	New Jersey	22	30	21	22	6
$167.9	NJ w/o Atl City	27	29	22	16	6
$198.0	Comp Set	24	29	24	16	7
$228.0	New York	24	28	24	17	7
$188.0	Pennsylvania	24	28	24	15	9
$191.7	Maryland	25	32	21	15	7
$161.9	Virginia	27	31	23	11	8
$167.4	Connecticut	23	33	17	23	5
$208.5	Massachusetts	21	31	29	15	4
$168.5	Ohio	27	25	25	17	6

Segment: Day Leisure Person-Days (%) ● n=880 household count
Source: 2022 *PERFORMANCE/Monitor*[SM]

MMGY Travel Intelligence

General 28%
- Shopping (20%)
- Other Activity (3%)
- Medical/Health/ Doctor Visit (3%)
- Business/Work (3%)
- Spa/Wellness (2%)
- Real Estate (1%)
- Volunteerism (0%)

Nature 35%
- Beach/Waterfront (27%)
- Camping (5%)
- Parks (5%)
- Eco-Travel (2%)

Attraction 30%
- Gambling (17%)
- Nightlife (7%)
- Attend/Participate Sports Event (5%)
- Theme/Water Parks (5%)
- Shows (2%)
- Zoo/Aquarium (0%)

Outdoor Sports 19%
- Boating/Sailing (6%)
- Bicycling (4%)
- Hiking (4%)
- Fishing (3%)
- Water Sports (3%)
- Golfing (1%)
- Snow/Winter Sports (1%)

Culture 17%
- Festival/Fairs (8%)
- Live Music (6%)
- Touring/Sightseeing (4%)
- Historic Sites (4%)
- Movies (3%)
- Museums, Art Exhibits (1%)

Family/ Life Events 33%
- Visit Friends/Relatives (15%)
- Birthday (11%)
- Anniversary (5%)
- Holiday Celebration (3%)
- Reunion/Graduation (2%)
- Wedding (2%)
- Funeral/Memorial (2%)

Libation and Culinary 22%
- Culinary/ Dining (21%)
- Winery/ Distillery/ Brewery Tours (1%)

Segment: Day Leisure Person-Stays (%) ● n=897 household count
Source: 2022 *PERFORMANCE/Monitor*[SM]

MMGY Travel Intelligence

Top Activities in the Destination

	U.S.	NJ	NJ w/o Atl City	Comp Set	NY	PA	MD	VA	CT	MA	OH
Beach/Waterfront	10%	27%	25%	8%	9%	2%	9%	13%	15%	13%	4%
Culinary/Dining	18%	21%	18%	17%	17%	20%	21%	19%	18%	14%	14%
Shopping	23%	20%	19%	20%	20%	28%	15%	14%	15%	19%	22%
Gambling	5%	17%	2%	5%	3%	9%	3%	0%	12%	4%	5%
Visit Friends/Relatives	17%	15%	15%	17%	20%	15%	12%	18%	19%	15%	14%
Birthday Celebrations	11%	11%	13%	12%	14%	8%	10%	14%	11%	15%	12%
Festivals/Fairs	4%	8%	7%	4%	2%	9%	4%	4%	3%	4%	3%
Nightlife	3%	7%	4%	4%	6%	3%	3%	3%	2%	3%	3%
Boating/Sailing	3%	6%	6%	3%	3%	3%	4%	3%	1%	4%	2%
Live Music	3%	6%	5%	3%	4%	3%	3%	1%	4%	1%	3%
Theme/Water Parks	3%	5%	7%	2%	2%	3%	1%	4%	0%	1%	4%
Parks (national, state)	5%	5%	6%	5%	7%	3%	2%	3%	2%	6%	7%
Anniversary Celebration	4%	5%	5%	4%	5%	5%	4%	2%	3%	2%	4%
Camping	3%	5%	3%	2%	3%	1%	2%	4%	1%	2%	2%
Amateur Sports (attend/participate)	4%	4%	5%	3%	4%	2%	2%	3%	6%	2%	4%
Hiking	6%	4%	5%	5%	6%	3%	5%	7%	6%	4%	3%
Historic Sites	5%	4%	5%	6%	6%	8%	5%	4%	4%	6%	2%
Biking	4%	4%	4%	4%	5%	2%	4%	3%	2%	1%	6%
Touring/Sightseeing	6%	4%	4%	7%	8%	7%	7%	3%	5%	7%	8%
Fishing	4%	3%	4%	3%	2%	3%	2%	6%	3%	3%	3%
Holiday Celebration	4%	3%	4%	4%	4%	3%	3%	4%	3%	6%	6%
Business/Work	3%	3%	4%	2%	3%	2%	2%	1%	1%	1%	1%

Segment: Day Leisure Person-Stays (%) ● n=897 household count
Source: 2022 *PERFORMANCE/Monitor*^SM

MMGY Travel Intelligence

Top Activities in the Destination

	U.S.	NJ	NJ w/o Atl City	Comp Set	NY	PA	MD	VA	CT	MA	OH
Movies	4%	3%	4%	4%	6%	4%	3%	4%	3%	3%	3%
Medical/Health/Doctor Visit	6%	3%	3%	5%	4%	5%	5%	5%	5%	2%	8%
Water Sports	1%	3%	3%	1%	1%	0%	1%	0%	0%	0%	0%
Reunion/Graduation	1%	2%	3%	1%	1%	1%	1%	0%	0%	0%	1%
College Sports Event	2%	2%	3%	2%	2%	1%	1%	1%	0%	3%	3%
Other Personal Celebration	1%	2%	2%	1%	1%	2%	1%	2%	0%	1%	1%
Show: Boat, Car, Home	1%	2%	2%	1%	2%	1%	1%	0%	2%	0%	1%
Funeral/Memorial	1%	2%	2%	2%	3%	1%	1%	1%	0%	1%	2%
Wedding	1%	2%	2%	1%	2%	1%	1%	1%	2%	0%	0%
Spa/Wellness	1%	2%	2%	1%	2%	0%	0%	0%	2%	1%	0%
Golfing	2%	1%	1%	1%	2%	1%	1%	1%	1%	1%	1%
Wildlife Viewing	2%	1%	1%	2%	1%	1%	2%	2%	1%	2%	4%
Winery/Distillery/Brewery Tours	2%	1%	1%	1%	1%	1%	0%	4%	1%	1%	1%
Extreme/Adventure Sports	1%	1%	1%	1%	1%	1%	0%	0%	1%	1%	2%
Snow/Winter Sports	1%	1%	1%	1%	1%	0%	2%	0%	*	*	1%
Museums, Art Exhibits, etc.	4%	1%	1%	5%	6%	6%	3%	3%	6%	7%	4%
Professional Sports Event	1%	1%	1%	2%	3%	1%	3%	0%	1%	2%	3%
Eco/Sustainable Travel	1%	1%	1%	1%	1%	*	1%	1%	0%	0%	2%
Hunting	1%	1%	1%	1%	1%	1%	0%	4%	0%	0%	2%
Real Estate (buy/sell)	1%	1%	1%	1%	1%	0%	1%	2%	0%	0%	0%
Zoo/Aquarium	2%	0%	1%	3%	1%	2%	4%	1%	7%	2%	6%
Theater/Dance Performance	1%	0%	0%	1%	3%	2%	0%	1%	1%	1%	1%

Segment: Day Leisure Person-Stays (%) ● n=897 household count

Source: 2022 *PERFORMANCE/Monitor*[SM]

MMGY Travel Intelligence

New Jersey Activity Index

- The activity index uses the US 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 US.

- 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 US destinations.

Gambling	Beach/ Waterfront	Water Sports	Nightlife	Boating/ Sailing	Festivals/ Fairs	Reunion/ Graduation	Live Music	Theme/ Water Parks	Show: Boat, Car, Home	Camping	Other Personal Celebration	Anniversary Celebration
360	261	222	207	203	201	196	189	181	176	142	136	132

U.S. Activity Participation = 100

Segment: Day Leisure Person-Stays (%) ● n=897 household count
Source: 2022 *PERFORMANCE/Monitor*[SM]

MMGY Travel Intelligence

New Jersey Activity Index (cont.)

- The activity index uses the US 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 US.

- 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 US destinations.

U.S. Activity Participation = 100

Activity	Index
Business/ Work	132
Funeral/ Memorial	128
Spa/ Wellness	123
Wedding	122
Culinary/ Dining	115
Amateur Sports	115
Snow/ Winter Sports	115
College Sports Event	109
Biking	102
Birthday Celebration	100
Parks (national/ state)	96
Fishing	95
Extreme/ Adventure Sports	92
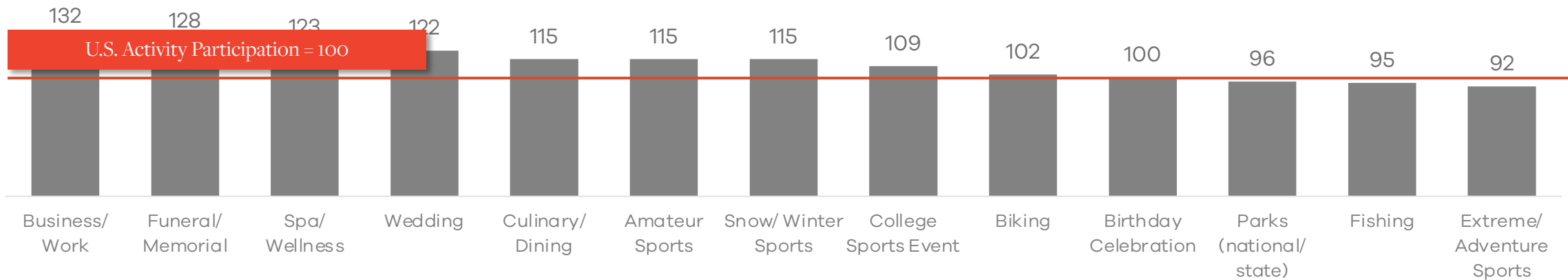
Segment: Day Leisure Person-Stays (%) ● n=897 household count

Source: 2022 *PERFORMANCE/Monitor*[SM]

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APPENDIX

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.

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 stay 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.

Generations
Millennial (1981-1996), GenX (1965-1980), Boomer (1946-1964), Silent/GI (before 1945)

Lifestage Definitions

Lifestage	Head of HH Age	HH Income	Children <18 in HH
Young & Free	18-34 years	Any	No
Young Family	18-34 years	Any	Yes
Mature & Free	35-54 years	Any	No
Moderate Family	35-54 years	Under $75K	Yes
Affluent Family	35-54 years	$75K+	Yes
Moderate Mature	55+ years	Under $60K	No
Affluent Mature	55+ years	$60K+	No

MMGY Travel Intelligence

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:

	Sample Size for 2022	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. Day Leisure	24,669	0.1%	0.2%	0.3%	0.4%	0.5%
New Jersey	897	0.5%	1.0%	1.4%	2.1%	2.7%
NJ w/o Atl City	732	0.6%	1.1%	1.6%	2.3%	3.0%
New York	1,943	0.4%	0.7%	1.0%	1.4%	1.9%
Pennsylvania	1,295	0.5%	0.8%	1.2%	1.7%	2.3%
Maryland	439	0.8%	1.4%	2.1%	3.0%	3.9%
Virginia	614	0.7%	1.2%	1.7%	2.5%	3.3%
Connecticut	341	0.9%	1.6%	2.3%	3.4%	4.4%
Massachusetts	626	0.7%	1.2%	1.7%	2.5%	3.3%
Ohio	1,021	0.5%	0.9%	1.4%	2.0%	2.6%

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%
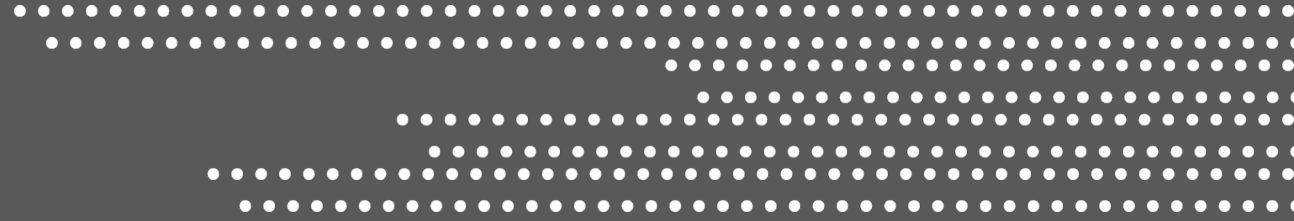
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