

New Jersey

| FY2008p VISITOR PROFILE
PUBLIC VERSION

*Prepared for: New Jersey Department of State
Division of Travel and Tourism*

Bernardo Costa
Senior Research Analyst

D.K. Shifflet & Associates, Ltd.
1750 Old Meadow Rd. Suite 620
McLean, VA 22102
www.dksa.com

Phone: 703.536.0926
Fax: 703.536.0580
Email: bcosta@dksa.com

March 2009 | *Excellence in Travel Intelligence®*





How to Read This Report	3	Positioning	
Study Specifications and Definitions	7	Positioning Intelligence Overview	54
Executive Summary	8	Purpose of Stay	59
Market Assessment		Travel Party Composition and Size	62
Person-Stays Volume Overview	20	Stay Length	66
Direct Spending Volume Overview	21	Average Daily Spending Per Person	70
New Jersey Volume Summary	22	Activities	72
New Jersey Volume Overview	24	Mode of Transportation	79
Market Share Overview	32	Trip Timing	80
Satisfaction and Value Ratings	35	Accommodation Type	84
Targeting		Communicating	
Targeting Intelligence Overview	39	Communicating Intelligence Overview	88
Age	42	Visitor Origin Markets	89
Children in Household	45	Travel Distance	95
Household Income	46	Appendices	
Household Lifestage	47	A Methodology	97
Generation	50	B Questionnaire	107



The report you are about to read is a comprehensive analysis of the travel market in the U.S. and New Jersey. After reviewing this report, it is DKSA's intention for travel marketers and planners to be better armed with the intelligence they need to develop tourism marketing strategies that will attract new visitors and provide a travel experience that will earn repeat visits and referrals. The body of this report is divided into four main sections – *Market Assessment*, *Targeting*, *Positioning*, and *Communicating* - which are further targeted to various roles within the tourism organization.

MARKET ASSESSMENT – *How many visitors does New Jersey attract?*

This section of this report will give the reader an understanding of the size and scope of the tourism market in the destination, helping destinations understand past market movements and prepare for possible changes in the future. This information enables the client to compare its ability in capturing market share to the destination's competitors.

The section ends with a review of traveler satisfaction and value ratings of New Jersey. The ratings are compared to the Competitive Set using the U.S. as a benchmark and will give destinations' competitive intelligence on consumer perceptions of travel satisfaction and value.

TARGETING – *Who are New Jersey's most important visitors?*

This section provides a demographic analysis of travelers to help travel marketers and planners to better focus their communication activities by identifying the largest market segment. The following slide represents three ways to analyze traveler demographic profiles and their recommended uses for marketing:



How to Read this Report (cont.)



VARIABLES	CHARACTERISTICS			RECOMMENDED USE
Demographics	Segmented by age, income and household			<i>A fundamental description of travelers that can be used for all marketing and communication vehicles</i>
Lifestages	Age of the Household Head	Household Income	Children under Age 18 in Household	<i>A discriminating segmentation of target audience for media targeting, CRM among others</i>
Young & Free	18-34 years	any	no	
Young Family	18-34 years	any	yes	
Maturing & Free	35-54 years	any	no	
Moderate Family	35-54 years	Under \$75K	yes	
Affluent Family	35-54 years	\$75K or higher	yes	
Moderate Mature	55 years or older	Under \$60K	no	
Affluent Mature	55 years or older	\$60K or higher	no	
Lifestage analysis combines three variables - age, household income, and presence of children in the household - into one variable containing seven mutually-exclusive segments defined above. Because of the age component, the lifestage segments are “moving targets” from year to year.				
Generations	Traveler’s Year of Birth			<i>A focused messaging approach that uses different mediums (radio, TV, and Internet) to target a specific audience</i>
Millennial	After 1981			
Gen X	1965-1980			
Boomers	1946-1964			
Silent	1930-1945			
GI	1929 and earlier			



POSITIONING – *How should New Jersey position its product?*

This section will help a destination compare its tourism product attributes against the competition. These attributes include a traveler's purpose of visit, travel party composition, activities participated in at the destination, and repeat visitation.

This intelligence highlights a destination's product strengths that can be promoted to attract new travelers or repeat visitors. It can also help destinations better differentiate themselves in a competitive travel market.



COMMUNICATING – *Where should New Jersey advertise and promote?*

The Communicating section assists travel marketers and planners in focusing on key markets that generate the largest share of visitors. This section will direct a destination to launch marketing communications programs to markets where they are most likely to convert 'lookers to bookers.'

Several origin market geographies are analyzed to provide a comprehensive overview of where their visitors reside. The following describes these geographies:

- U.S. Census Bureau - groups U.S. states into nine divisions for statistical reporting purposes. These divisions are based on purposes established in 1910 and are provided here for comparison to other Census data.
- DMAs or Designated Marketing Areas - defined by Nielsen Media Research, Inc, denote a geographical area consisting of a primary city and surrounding county or counties. There are 210 DMAs in the U.S. Each DMA represents a unified geographic media market. Every U.S. county is in one and only one DMA.

The Communicating section also provides an analysis of the destination's competitive set and its respective share of key origin markets. This analysis helps to assist a destination know where their visitors travel and thus arming destination marketers with a strategy to lure visitors away from the competition.

How to Read this Report (cont.)



- Each of the four main sections – *Market Assessment, Targeting, Positioning, and Communicating* – is further divided into two sub-sections:
- **Section Summary Findings:** The section summary findings reviews the key conclusions from the data presented in the detailed graphs.
- **Detailed Data Graphs:** The detailed data graphs present the data in two primary ways.
 - The destination's visitor performance compared to the U.S. and the Competitive Set
 - The destination's segments' average party per trip spending performance, and
 - A comparison of the segments' share of all travel party members at the destination to their spending contribution in the market.

Study Specifications and Definitions



- Methodology – All of the information contained in this report is derived from DKSA **DIRECTIONS®** tracking system
- Objective – Describe the domestic Overnight Leisure travel market in New Jersey compared to the U.S. and Competitive Set
- Travel definition – An overnight trip or any day-trip greater than 50 miles one-way from home
- Sampling Frame – All U.S. domestic Overnight Leisure travelers on combined mail and online panel during FY2008p in the following destinations:
 - New Jersey
 - Comp Set (New York, Pennsylvania, Maryland, Virginia, North Carolina)
 - New Jersey without Atlantic City (NJ w/o Atlantic City)
- Timeframe – FY2008p (Q4 2007 – Q3 2008)



Background

This New Jersey visitor study provides intelligence on U.S. and New Jersey travel trends from FY2008p. Information is also provided for each of five competing destinations. Volume and profile data are from D. K. Shifflet & Associate's **PERFORMANCE/MonitorSM Travel Intelligence SystemSM** — the largest travel-tracking system in the U.S. The FY2008p New Jersey Overnight Leisure visitor profile is based on a sample of 1,445 households. Appendix A contains details on study methodology and definitions of terms such as Person-Stays and Person-Days.

New Jersey Volume Trends

New Jersey hosted 31.72 million travel parties or 70.93 million visitors in FY2008p, declining 6.8% and 4.3% respectfully over FY2007. Out of these, 57.75 million visited New Jersey for Leisure while 13.18 million traveled for Business. The typical travel party consisted of 2.24 persons, a 2.6% increase over FY2007. On average, travel parties stayed 1.96 nights in New Jersey, relatively unchanged over the last reporting year. As expected, Leisure travel parties had longer stays (2.01 nights) than Business (1.75 nights). The State hosted 139.08 million Person-Days or visitor days in FY2008p, declining 3.7% over FY2007. New Jersey Total Direct Spending declined 11.4% to a three year low \$14.83 billion in FY2008p. Although attracting fewer visitors in FY2008p, those who visited the State scaled back their spending across several spending categories, especially Shopping (-19.4%), Entertainment (-26.3%), and Other expenses (-27.4%).



New Jersey Market Share

New Jersey share of the U.S. Overnight Leisure travel market declined across all volume measurements in FY2008p. The State's share of the U.S. ranged from a low 2.24% of Trip-Dollars to a high 2.44% of Stays or travel parties. In terms of Person-Stays or visitors, New Jersey share of the U.S. declined from 2.64% to 2.39%, placing the State 16th out of the 50 U.S. States in FY2008p.

New Jersey Satisfaction and Value Ratings

On average, Overnight Leisure visitors gave New Jersey a rating of 7.6 for satisfaction and a 7.4 for value-for-the-money in FY2008p. Excluding Atlantic City, visitors rated New Jersey slightly better, giving the State 7.8 for satisfaction and 7.5 for value. Nevertheless, New Jersey's average satisfaction and value ratings remained below the average U.S. destination and Competitive Set in FY2008p.



New Jersey Targeting

The majority of New Jersey Overnight Leisure visitors in FY2008p were between 35 and 54 years of age, with no children in their household and reported a household income of \$100,000 or more. Below are some noticeable demographical differences between New Jersey and NJ w/o Atlantic City:

New Jersey

- Average Age = 48 years
- Average Household Income = \$96,264
- 64% do not have children in their household
- Affluent Mature, Maturing & Free
- Boomers
- Average Party per Trip Spending = \$892

NJ w/o Atlantic City

- Average Age = 45 years
- Average Household Income = \$91,155
- 54% do not have children in their household
- Maturing & Free, Affluent Family, Young Family
- GenXers
- Average Party per Trip Spending = \$946



New Jersey Positioning

The largest proportion of New Jersey Overnight Leisure visitors visited the State in FY2008p for vacation purposes; either for a Getaway Weekend (32%) or General Vacation (21%). When Atlantic City is excluded, the majority of visitors traveled for non-vacation purposes, particularly to visit Friends or Relatives (39%).

On average, the typical New Jersey Overnight Leisure travel party consisted of 2.31 persons, and rose to 2.44 persons when Atlantic City was excluded. The majority were Couples* (41%), while NJ w/o Atlantic City was more popular among Families (32%).

Generally, travel parties stayed an average of 2.62 nights in the State, relatively shorter than the average U.S. destination (2.98 nights) and Competitive Set (2.83 nights). However, when New Jersey is considered without Atlantic City, the length of stay increased to 3.10 nights.

In terms of spending, New Jersey Overnight Leisure visitors spent an average of \$102 per day, and \$93 per day when excluding Atlantic City. Overall, New Jersey Overnight Leisure visitors daily spending declined 8.9% in FY2008p over FY2007. Visitors reduced their daily spending across all spending categories, with the largest drops in Miscellaneous (-26.3%) and Entertainment (-22.6%). Most New Jersey Overnight Leisure visitors participated in activities involving Gambling, Dining, Entertainment, Beach, Waterfront, Shopping, Night Life, Sightseeing, Concert, Play and Dance.



New Jersey Positioning (cont.)

Approximately nine out of ten visitors arrived in New Jersey by auto in FY2008p. The State attracted visitors throughout the year, however, the majority (35%) arrived in the Third Quarter, especially in August and July.

Over half of all Overnight Leisure visitors opted for Hotels in FY2008p, significantly more than the Competitive Set average. Most stayed at Economy properties, however, New Jersey attracted the largest proportion of visitors staying at High-End properties in relation to the average U.S. destination and Competitive Set. Conversely, the majority or two-fifths of NJ w/o Atlantic City visitors stayed at Private Homes due to the high volume of travelers visiting Friends or Relatives.

Communicating

Over one-third of New Jersey Overnight Leisure visitors originated within the State in FY2008p. Excluding in-state visitation, New York, Pennsylvania, Maryland and Florida accounted for over two-fifths of New Jersey Overnight Leisure visitors. On a DMA level, visitors originating from New York, NY and Philadelphia, PA represented almost two-thirds of the New Jersey Overnight Leisure travel market during FY2006-08p.

Key Conclusions and Recommendations



Focus on your customers

Key segments noted below identify the major characteristics of the New Jersey and NJ w/o Atlantic City Overnight Leisure travel market. These visitors deserve special attention.

New Jersey

35-54 Age Group

- Majority of visitors belong to this age group
- Fastest growing age group

55+ Age Group

- Significantly greater share than the average U.S. destination and Competitive Set

No Children in Household

- Almost two-thirds of visitors do not have children in their households

\$100,000+ Household Income

- Increased 14 percentage points since FY2004
- New Jersey attracted a significantly larger share of \$100,000+ visitors compared to and the average U.S. destination and Competitive Set

Affluent Mature, Maturing & Free

- Accounted for the largest share of Trip-Dollars spent in FY2006-08p

NJ w/o Atlantic City

35-54 Age Group

- Majority of visitors belong to this age group
- Increased in FY2008p after a five year low in FY2007
- Led the average U.S. destination and Competitive Set

No Children in Household

- Over half of visitors do not have children in their households

\$100,000+ Household Income

- Although less than the State as a whole, NJ w/o Atlantic City attracted a significantly greater share of visitors reporting a household income of \$100,000 + than the average U.S. destination and Competitive Set

Maturing & Free, Affluent Family, Young Family

- Represented the largest proportion of NJ w/o Atlantic City visitors

Key Conclusions and Recommendations (cont.)



Focus on your customers (cont.)

Key segments noted below identify the major characteristics of the New Jersey and NJ w/o Atlantic City Overnight Leisure travel market. These visitors deserve special attention.

New Jersey

Boomers

- Significantly greater in relation to the average U.S. destination and Competitive Set
- Increased in FY2008p, after two years of declines

Getaway Weekends

- Not only accounted for the largest share of visitors but also the largest share of Trip-Dollars
- Although decreasing to a five year low in FY2008p, New Jersey attracted a significantly greater share of Getaway Weekend visitors than the average U.S. destination and Competitive Set

Couples*

- Reached a five year low share in FY2008p, but led the average U.S. destination and Competitive Set
- Represented forty-one cents out of every dollar spent during FY2006-08p

NJ w/o Atlantic City

GenXers

- Two-fifths of NJ w/o Atlantic City were GenXers
- Spent substantially more per trip (\$969) than GenXers of the Competitive Set average (\$857)

Travelers Visiting Friends or Relatives (VFR)

- Not only accounted for the largest share of visitors but also for the largest share of Trip-Dollars
- Flat over FY2007

Families

- Peaked in FY2008p
- Attracted the largest proportion of Families in relation to the Competitive Set and the average U.S. destination
- Spent more per trip (\$1,262) than those of the Competitive Set (\$1,105)

Key Conclusions and Recommendations (cont.)



Focus on your customers (cont.)

Key segments noted below identify the major characteristics of the New Jersey and NJ w/o Atlantic City Overnight Leisure travel market. These visitors deserve special attention.

New Jersey

1-3 Nights Stays

- Eight out of ten travel parties visited the State for less than three nights

Gambling

- One-third of visitors Gambled while in New Jersey for an Overnight Leisure stay, nearly four times more than those of the average U.S. destination

Third Quarter

- Over one-third visited New Jersey in the Third Quarter, accounting for forty cents out of every dollar spent during FY2006-08p

Hotel Stays

- More than half New Jersey Overnight Leisure visitors stayed at Hotels, significantly more than those of the Competitive Set
- Majority opted for Economy properties

New York, NY and Philadelphia, PA DMAs

- Two-thirds of New Jersey Overnight Leisure visitors originated from those DMAs during FY2006-08p

NJ w/o Atlantic City

1-3 Nights Stays

- Seven out of ten travel parties visited the State for less than three nights

Beach, Waterfront

- Over one-fourth of visitors participated in activities involving Beach, Waterfront; significantly more than those visiting the average U.S. destination and Competitive Set

Third Quarter

- Significantly ahead of the Competitive Set and New Jersey in share of Third Quarter visitation

Visitors Staying at Private Homes

- Over two-fifths stayed at Private Homes, declining substantially over FY2007

New York, NY and Philadelphia, PA DMAs

- Represented six out of ten NJ w/o Atlantic City Overnight Leisure visitors during FY2006-08p

Key Conclusions and Recommendations (cont.)



Focus on potential opportunities

The segments listed below highlight potential opportunities that may offer increased travel volume as well as increased spending.

New Jersey

35-54 Age Group

- Only age group with a positive Trip-Dollars to Stays ratio

Maturing & Free, Affluent Family

- Increased in share over FY2007
- Accounted for a larger shares of Trip-Dollars contributed in relation to travel party visitation

General Vacation

- Reached a five year high in FY2008p, leading the Competitive Set and average U.S. designation
- Most valuable purpose of stay based on a Positive Trip-Dollars (27%) to Stays ratio (17%)

Families, Three or More Adults

- Only lucrative travel parties when basing Trip-Dollars spent in relation to travel party volume

Stays of 3 + Nights

- Room for growth, as only one-third of New Jersey Overnight Leisure parties stayed 3 nights or more

NJ w/o Atlantic City

35-54 Age Group

- Most lucrative age group based on a higher share of Trip-Dollars spent in relation to travel party volume

Affluent Family

- Peaked in FY2008p
- Affluent Family travel parties spent significantly more per trip (\$1,114) than the NJ w/o Atlantic City average travel party (\$946)

General Vacation

- Increased over FY2007 but slightly below New Jersey
- However, these travel parties spent significantly more per trip (\$2,337) than those of New Jersey (\$1,472)

Families, Three or More Adults

- Only lucrative travel parties when basing Trip-Dollars spent to travel party volume

Stays of 4 + Nights

- Although a small segment, these travel parties (23%) accounted for almost half (48%) of all Trip-Dollars spent during FY2006-08p

Key Conclusions and Recommendations (cont.)



Focus on potential opportunities (cont.)

The segments listed below highlight potential opportunities that may offer increased travel volume as well as increased spending.

New Jersey

Activity Participation

- Dining*, Entertainment*, Gambling, Shopping*, Beach, Waterfront, Night Life, Sightseeing and Concert, Play, Dance generated the highest shares of Trip-Dollars contributed to the State

Third Quarter

- Increased for the second consecutive year
- Travel parties who traveled in the Third Quarter spent significantly more than those traveling during other quarters

Hotel Stays

- Declined in FY2008p, but continued leading the Competitive Set
- Positive Trip-Dollars (63%) to Stays ratio (58%)

Other Paid Accommodations

- Although a small segment, travel parties staying in other paid accommodations (bed & breakfast, beach homes, condos, etc...) spent significantly more per trip (\$2,219) than those staying at hotels (\$927)

*These activities were based on minimum spending levels.

NJ w/o Atlantic City

Activity Participation

- Dining*, Shopping*, Entertainment*, Beach, Waterfront, Sightseeing, Night Life and Theme/Amusement Parks were the most valuable activities based on higher shares of Trip-Dollars vs. travel party volume

Third Quarter

- Attracted a significantly larger share of Overnight Leisure visitors than the Competitive Set
- Nearly half of NJ w/o Atlantic City Overnight Leisure Trip-Dollars were generated in this quarter

Hotel Stays

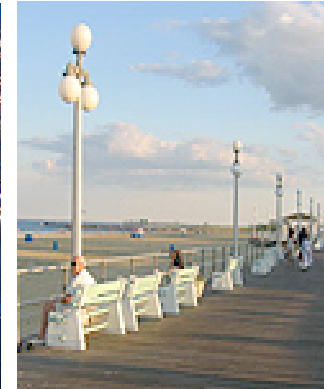
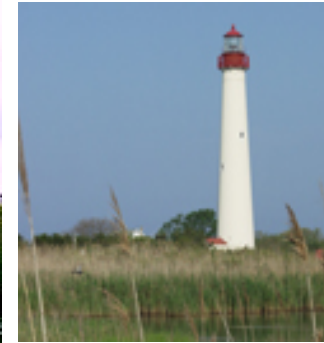
- Although smaller in share than New Jersey, Hotel Stays were the most valuable segment for NJ w/o Atlantic City

Other Paid Accommodations

- Increased over FY2007, slightly larger share than its New Jersey counterpart
- Second most valuable segment when measuring Trip-Dollars (13%) vs. Stays (8%)



New Jersey Detailed Findings



Courtesy of the New Jersey Division of Travel and Tourism

New Jersey Person-Stays Volume Overview



- New Jersey hosted 70.93 million visitors in FY2008p, 4.3% less than in FY2007. Visitation declined across all travel segments, ranging from a low of -1.6% in Day Leisure to a record drop of -7.2% in the Overnight Leisure market.
- Out of those who visited the State in FY2008p, 13.18 million traveled for Business and 57.75 million traveled for Leisure.
- Among those traveling for Business, 8.08 million were Day-Trippers and 5.10 million stayed Overnight.
- The Day/Overnight gap was narrower in the Leisure segment, as 29.70 million visited the State for a Day trip, while 28.05 million stayed Overnight.

New Jersey Direct Spending Volume Overview



- New Jersey Total Direct Spending declined from \$16.74 billion in FY2007 to \$14.83 billion in FY2008p. Total visitor spending declined at its fastest rate in at least ten years, as spending across all segments excluding Day Business shrank in FY2008p.
- Business spending decreased 12.9%, reaching a five year low of \$3.05 billion in FY2008p. Overnight Business drove the decline, decreasing 18.3% over FY2007.
- Leisure spending followed a similar trend, declining 11.0% to \$11.79 billion in FY2008p over FY2007. Day Leisure spending led the decline, shrinking 18.5% over FY2007, twice as much as the Overnight Leisure decline rate of 9.2%.

New Jersey Volume Summary



New Jersey volume (millions)

note: FY=Q4 last year - Q3 current year

	%Change										
Stays	FY2003	FY2004	FY2005	FY2006	FY2007	FY2008p	FY04/FY03	FY05/FY04	FY06/FY05	FY07/FY06	FY08p/FY07
Total	30.79	33.80	33.41	33.06	34.02	31.72	9.8%	-1.1%	-1.1%	2.9%	-6.8%
Business	8.90	8.57	8.09	8.99	7.48	8.50	-3.7%	-5.6%	11.2%	-16.9%	13.7%
Leisure	21.89	25.23	25.32	24.06	26.54	23.22	15.3%	0.4%	-5.0%	10.3%	-12.5%
Day	18.63	19.53	19.13	18.01	17.72	16.33	4.8%	-2.0%	-5.9%	-1.6%	-7.9%
Overnight	12.15	14.27	14.28	15.05	16.30	15.40	17.4%	0.1%	5.4%	8.3%	-5.5%
Day Business	6.44	5.66	5.18	5.93	4.35	5.24	-12.2%	-8.4%	14.5%	-26.6%	20.3%
Day Leisure	12.19	13.88	13.96	12.08	13.37	11.09	13.8%	0.6%	-13.4%	10.7%	-17.0%
Overnight Business	2.46	2.91	2.91	3.06	3.12	3.26	18.5%	-0.1%	5.3%	2.0%	4.4%
Overnight Leisure	9.70	11.35	11.37	11.98	13.17	12.13	17.1%	0.1%	5.4%	9.9%	-7.9%

Person-Stays	FY2003	FY2004	FY2005	FY2006	FY2007	FY2008p	FY04/FY03	FY05/FY04	FY06/FY05	FY07/FY06	FY08p/FY07
Total	65.96	69.95	70.21	71.68	74.13	70.93	6.0%	0.4%	2.1%	3.4%	-4.3%
Business	13.03	12.67	13.12	14.50	13.73	13.18	-2.8%	3.5%	10.6%	-5.3%	-4.0%
Leisure	52.93	57.28	57.09	57.18	60.39	57.75	8.2%	-0.3%	0.2%	5.6%	-4.4%
Day	40.35	40.38	39.02	39.00	38.72	37.78	0.1%	-3.4%	0.0%	-0.7%	-2.4%
Overnight	25.61	29.57	31.19	32.68	35.40	33.14	15.5%	5.5%	4.8%	8.3%	-6.4%
Day Business	9.17	8.43	8.54	9.63	8.54	8.08	-8.1%	1.3%	12.9%	-11.3%	-5.4%
Day Leisure	31.18	31.95	30.48	29.37	30.18	29.70	2.5%	-4.6%	-3.7%	2.8%	-1.6%
Overnight Business	3.86	4.24	4.58	4.87	5.19	5.10	9.9%	8.0%	6.2%	6.7%	-1.8%
Overnight Leisure	21.75	25.33	26.61	27.82	30.21	28.05	16.4%	5.0%	4.5%	8.6%	-7.2%

New Jersey Volume Summary (cont.)



New Jersey volume (millions)

note: FY=Q4 last year - Q3 current year

note: FY=Q4 last year - Q3 current year									%Change			
Person-Days		FY2003	FY2004	FY2005	FY2006	FY2007	FY2008p	FY04/FY03	FY05/FY04	FY06/FY05	FY07/FY06	FY08p/FY07
Total		121.39	129.15	131.37	132.57	144.45	139.08	6.4%	1.7%	0.9%	9.0%	-3.7%
Business		20.75	20.21	22.97	20.45	24.40	23.07	-2.6%	13.6%	-10.9%	19.3%	-5.4%
Leisure		100.64	108.93	108.41	112.12	120.05	116.01	8.2%	-0.5%	3.4%	7.1%	-3.4%
Day		30.26	30.19	29.16	29.44	29.30	28.29	-0.2%	-3.4%	1.0%	-0.5%	-3.4%
Overnight		91.13	98.96	102.22	103.14	115.15	110.78	8.6%	3.3%	0.9%	11.7%	-3.8%
Day Business		6.88	6.29	6.73	7.09	6.47	6.03	-8.6%	7.1%	5.3%	-8.7%	-6.8%
Day Leisure		23.38	23.90	22.43	22.35	22.82	22.26	2.2%	-6.2%	-0.3%	2.1%	-2.5%
Overnight Business		13.87	13.93	16.23	13.37	17.92	17.03	0.4%	16.6%	-17.7%	34.1%	-5.0%
Overnight Leisure		77.26	85.03	85.98	89.77	97.23	93.75	10.1%	1.1%	4.4%	8.3%	-3.6%

Spending	FY2003	FY2004	FY2005	FY2006	FY2007	FY2008p	FY04/FY03	FY05/FY04	FY06/FY05	FY07/FY06	FY08p/FY07
Total	\$12,680	\$13,368	\$14,322	\$15,707	\$16,741	\$14,832	5.4%	7.1%	9.7%	6.6%	-11.4%
Business	\$2,854	\$3,046	\$3,279	\$3,167	\$3,498	\$3,045	6.7%	7.7%	-3.4%	10.5%	-12.9%
Leisure	\$9,825	\$10,322	\$11,043	\$12,540	\$13,243	\$11,787	5.1%	7.0%	13.6%	5.6%	-11.0%
Day	\$3,277	\$3,255	\$3,222	\$3,717	\$3,053	\$2,675	-0.7%	-1.0%	15.4%	-17.9%	-12.4%
Overnight	\$9,402	\$10,113	\$11,099	\$11,989	\$13,689	\$12,157	7.6%	9.8%	8.0%	14.2%	-11.2%
Day Business	\$647	\$802	\$767	\$939	\$536	\$625	23.9%	-4.3%	22.3%	-42.9%	16.5%
Day Leisure	\$2,630	\$2,453	\$2,455	\$2,779	\$2,517	\$2,050	-6.7%	0.1%	13.2%	-9.4%	-18.5%
Overnight Business	\$2,207	\$2,244	\$2,512	\$2,228	\$2,962	\$2,421	1.6%	11.9%	-11.3%	32.9%	-18.3%
Overnight Leisure	\$7,195	\$7,869	\$8,587	\$9,761	\$10,727	\$9,737	9.4%	9.1%	13.7%	9.9%	-9.2%

Hotel/ Motel Paid Room Night	FY2003	FY2004	FY2005	FY2006	FY2007	FY2008p	FY04/FY03	FY05/FY04	FY06/FY05	FY07/FY06	FY08p/FY07
Total	17.64	18.56	19.34	20.04	19.93	19.63	5.2%	4.2%	3.6%	-0.6%	-1.5%
Business	7.47	6.40	6.17	5.32	5.80	6.12	-14.3%	-3.7%	-13.7%	9.0%	5.4%
Leisure	10.17	12.16	13.17	14.73	14.13	13.51	19.5%	8.4%	11.8%	-4.0%	-4.4%

New Jersey Volume Changes Explained



		FY2007	FY2008p	% Change
Stays (Travel Parties) (million)	Total	34.02	31.72	-6.8%
	Business	7.48	8.50	13.7%
	Leisure	26.54	23.22	-12.5%
Average Party Size (persons)	Total	2.18	2.24	2.6%
	Business	1.84	1.55	-15.6%
	Leisure	2.28	2.49	9.3%
Person-Stays (Visitors) (million)	Total	74.13	70.93	-4.3%
	Business	13.73	13.18	-4.0%
	Leisure	60.39	57.75	-4.4%
Average Stay Length (Stays bases/0+ Nights)	Total	1.95	1.96	0.6%
	Business	1.78	1.75	-1.5%
	Leisure	1.99	2.01	1.1%
Person-Days (Visitor-Days) (million)	Total	144.45	139.08	-3.7%
	Business	24.40	23.07	-5.4%
	Leisure	120.05	116.01	-3.4%
Day/ Overnight Mix (% Day Trips)	Total	52.1%	51.5%	-1.2%
	Business	58.2%	61.6%	5.8%
	Leisure	50.4%	47.8%	-5.2%
Average Party Spending (\$)	Total	492.14	467.59	-5.0%
	Business	467.91	358.30	-23.4%
	Leisure	498.96	507.59	1.7%
Total Direct Spending (\$ billion)	Total	16.74	14.83	-11.4%
	Business	3.50	3.05	-12.9%
	Leisure	13.24	11.79	-11.0%
Spending per Person/ Day (\$)	Total	115.90	106.65	-8.0%
	Business	143.39	132.00	-7.9%
	Leisure	110.31	101.61	-7.9%

- New Jersey hosted a total of 31.72 million travel parties in FY2008p; 2.30 million fewer than in FY2007. The decline resulted from a weakening Leisure segment, declining at its fastest rate in at least ten years.
- Nevertheless, the average party size grew in FY2008p in relation to FY2007, forcing a deceleration in the decline of visitor volume.
- The typical travel party spent 1.96 nights in New Jersey, with Leisure travel parties staying slightly longer than those traveling for Business.
- Person-Days, which measures the number of days contributed to a destination also decreased, due to a decline in visitor volume coupled with a flat average stay length.
- Total Direct Spending reached a three year low in FY2008p, as both Business and Leisure declined by double digit figures. Total Direct Spending declined at an unprecedented rate when measured against the drop in visitation volume, as consumers cut back on travel while those who managed to travel made significant adjustments allocating their dollars.

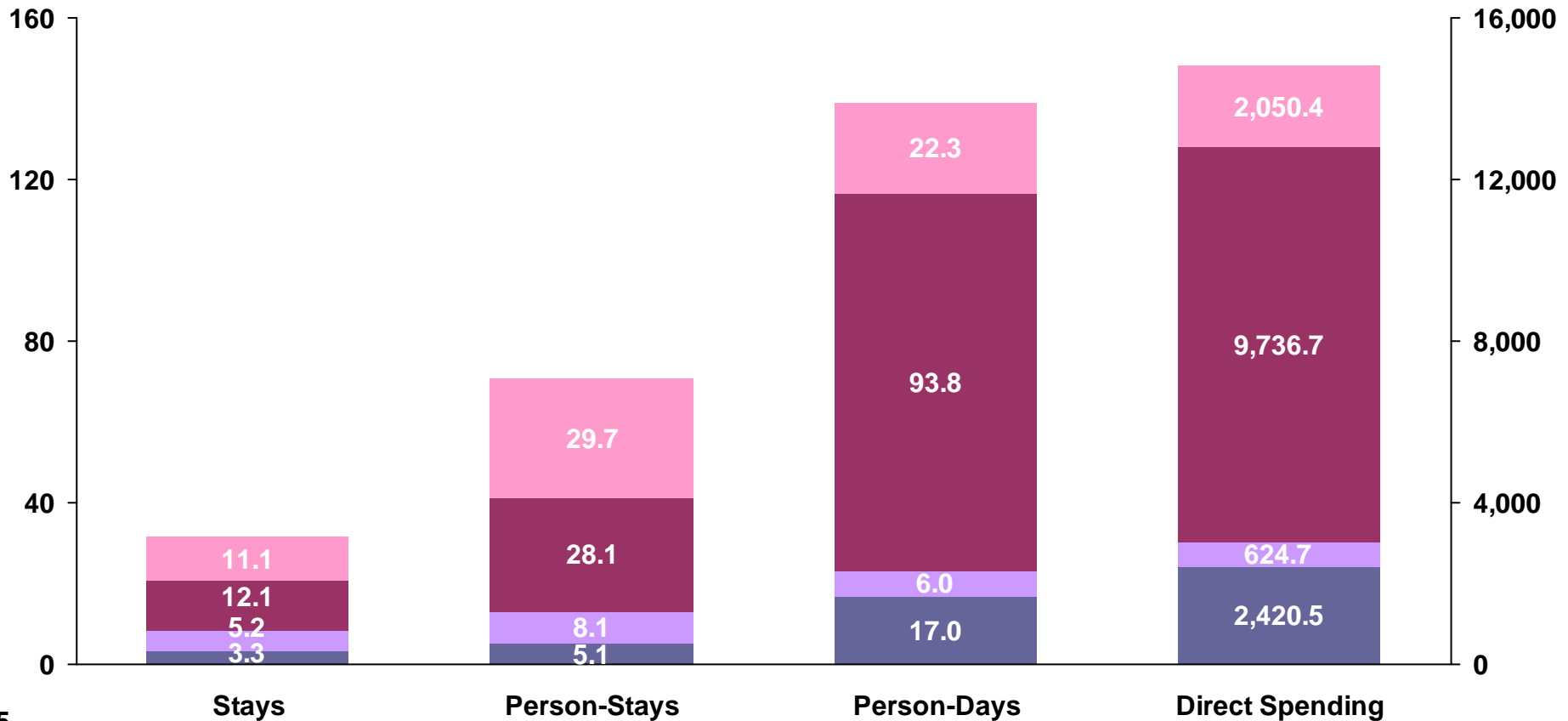
New Jersey FY2008p Volume



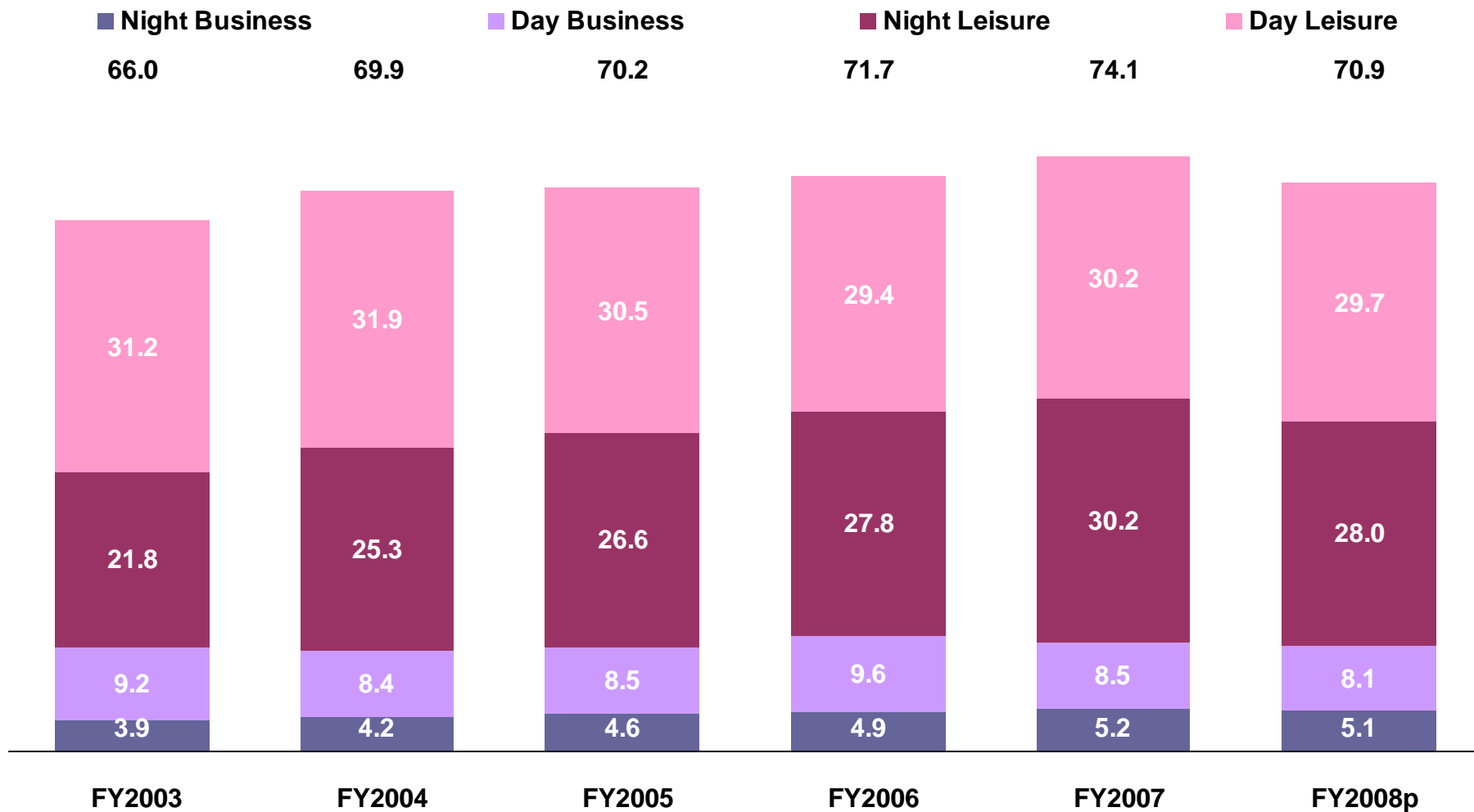
Stays
Person-Stays
Person-Days
(Million)

Direct Spending
(\$ Million)

■ Night Business ■ Day Business ■ Night Leisure ■ Day Leisure



New Jersey Person-Stays Volume (Million)



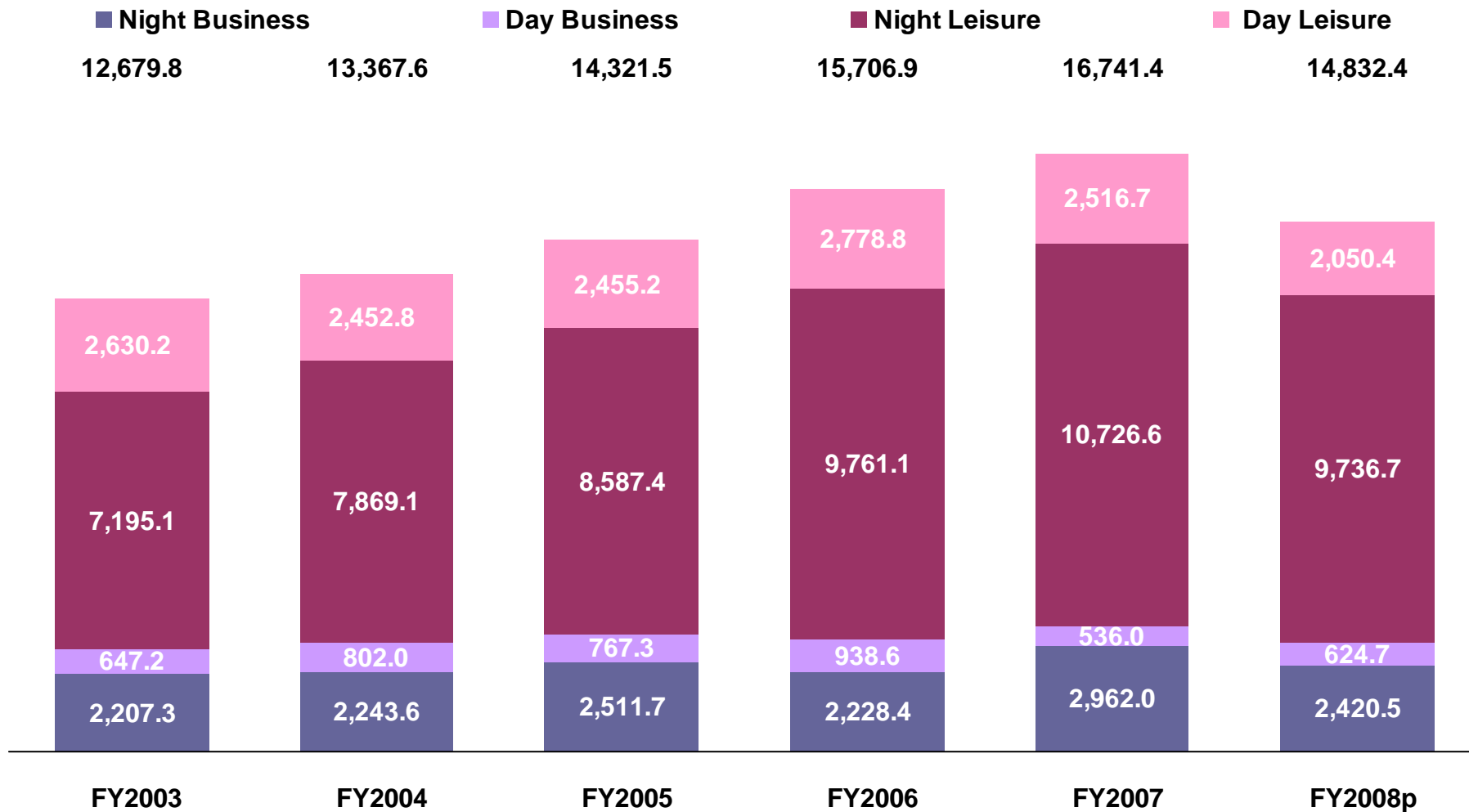
New Jersey Person-Stays Volume (% Change)



This chart shows the Person-Stays volume year-to-year percent changes for each of the travel segments discussed in this report.

	New Jersey					U.S.	Comp Set
	FY04/FY03	FY05/FY04	FY06/FY05	FY07/FY06	FY08p/FY07	FY08p/FY07	FY08p/FY07
Total	6.0%	0.4%	2.1%	3.4%	-4.3%	-1.3%	-3.0%
Business	-2.8%	3.5%	10.6%	-5.3%	-4.0%	-3.4%	-6.5%
Leisure	8.2%	-0.3%	0.2%	5.6%	-4.4%	-0.6%	-1.7%
Day	0.1%	-3.4%	0.0%	-0.7%	-2.4%	-2.0%	-4.0%
Night	15.5%	5.5%	4.8%	8.3%	-6.4%	-0.6%	-1.9%
Day Business	-8.1%	1.3%	12.9%	-11.3%	-5.4%	-5.1%	-9.7%
Day Leisure	2.5%	-4.6%	-3.7%	2.8%	-1.6%	-0.8%	-1.6%
Night Business	9.9%	8.0%	6.2%	6.7%	-1.8%	-1.2%	-1.8%
Night Leisure	16.4%	5.0%	4.5%	8.6%	-7.2%	-0.4%	-1.9%

New Jersey Direct Spending Volume (\$Million)



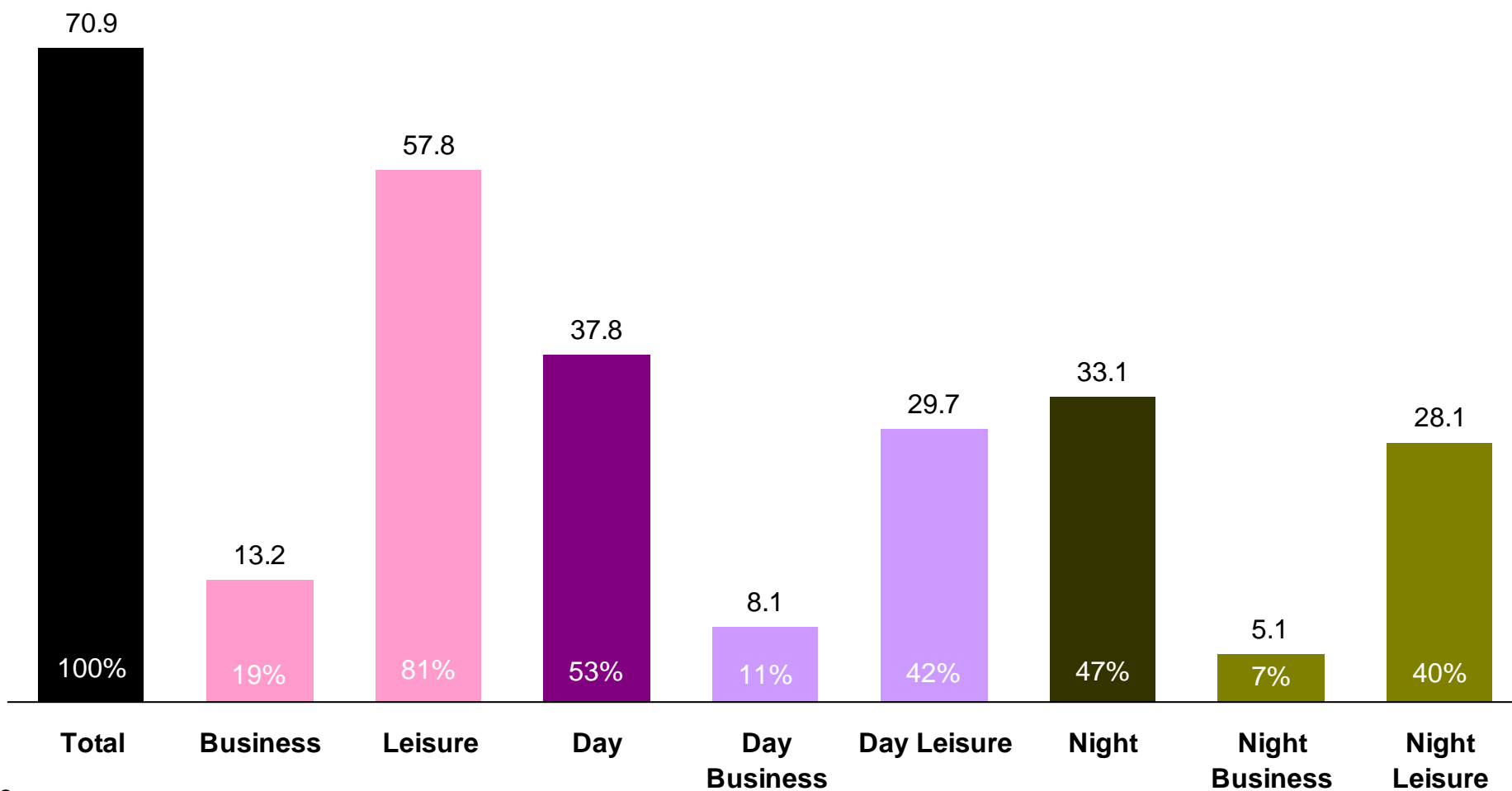
New Jersey Direct Spending Volume (% Change)



This chart shows the Direct Spending volume year-to-year percent changes for each of the travel segments discussed in this report.

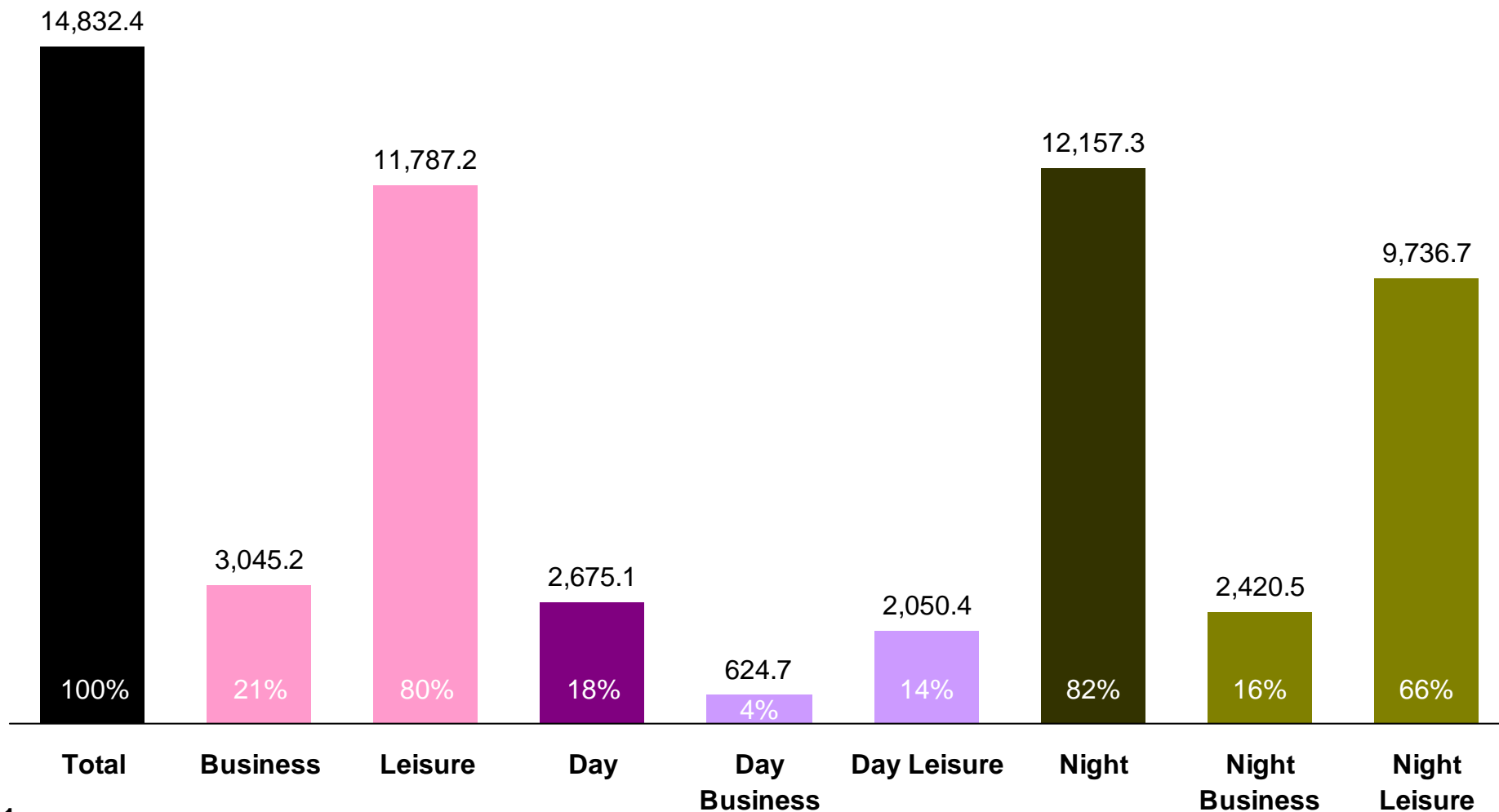
	New Jersey					U.S.	Comp Set
	FY04/FY03	FY05/FY04	FY06/FY05	FY07/FY06	FY08p/FY07	FY08p/FY07	FY08p/FY07
Total	5.4%	7.1%	9.7%	6.6%	-11.4%	-7.2%	-4.8%
Business	6.7%	7.7%	-3.4%	10.5%	-12.9%	-6.9%	-3.8%
Leisure	5.1%	7.0%	13.6%	5.6%	-11.0%	-7.3%	-5.2%
Day	-0.7%	-1.0%	15.4%	-17.9%	-12.4%	-16.8%	-15.2%
Night	7.6%	9.8%	8.0%	14.2%	-11.2%	-5.3%	-2.5%
Day Business	23.9%	-4.3%	22.3%	-42.9%	16.5%	-18.4%	-18.9%
Day Leisure	-6.7%	0.1%	13.2%	-9.4%	-18.5%	-16.2%	-13.5%
Night Business	1.6%	11.9%	-11.3%	32.9%	-18.3%	-4.7%	-0.2%
Night Leisure	9.4%	9.1%	13.7%	9.9%	-9.2%	-5.5%	-3.4%

New Jersey Person-Stays Volume Summary (Million in FY2008p)



New Jersey Direct Spending Volume Summary

(\$Million in FY2008p)



New Jersey Market Share Overview

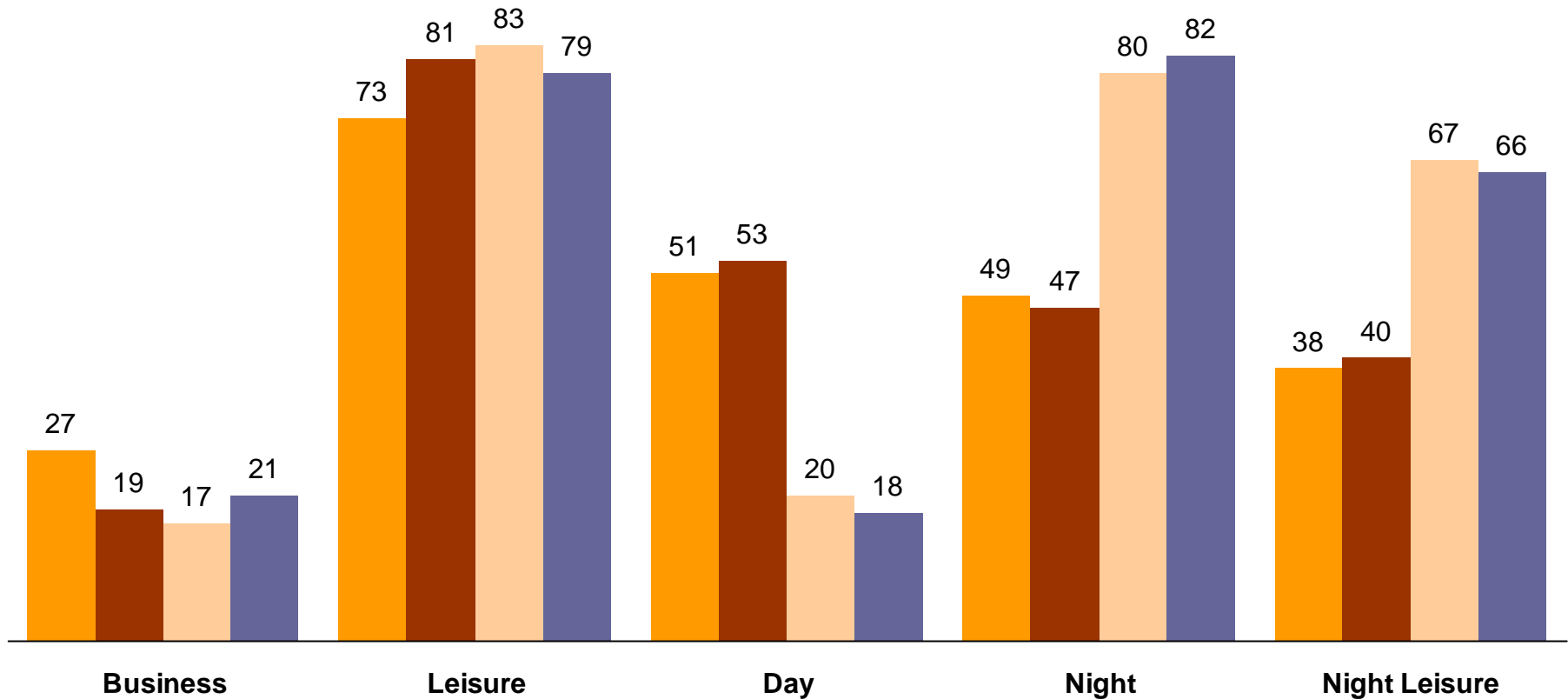


- Within the New Jersey travel market, Leisure continued to lead Business across all volume measurements in FY2008p. Over half of the State's visitors were Day Trippers, however; the Overnight segment proved to be more profitable based on a larger share of Trip-Dollars in relation to travel party volume.
- Overnight Leisure, the focus of this report, made up two-fifths of the total New Jersey travel market; accounting for sixty-six cents out of every dollar spent by a New Jersey visitor in FY2008p.
- Following the visitor volume decline in FY2008p, New Jersey's share of the U.S. Overnight Leisure travel market also declined. The State's share of the U.S. ranged from a low 2.24% of Trip-Dollars to a high 2.44% of travel parties. However, New Jersey wasn't the only state to loose ground; as three of the five competitors' share of the U.S. Overnight Leisure travel market also declined over FY2007.

New Jersey Travel Segments (% of Total Volume in FY2008p)



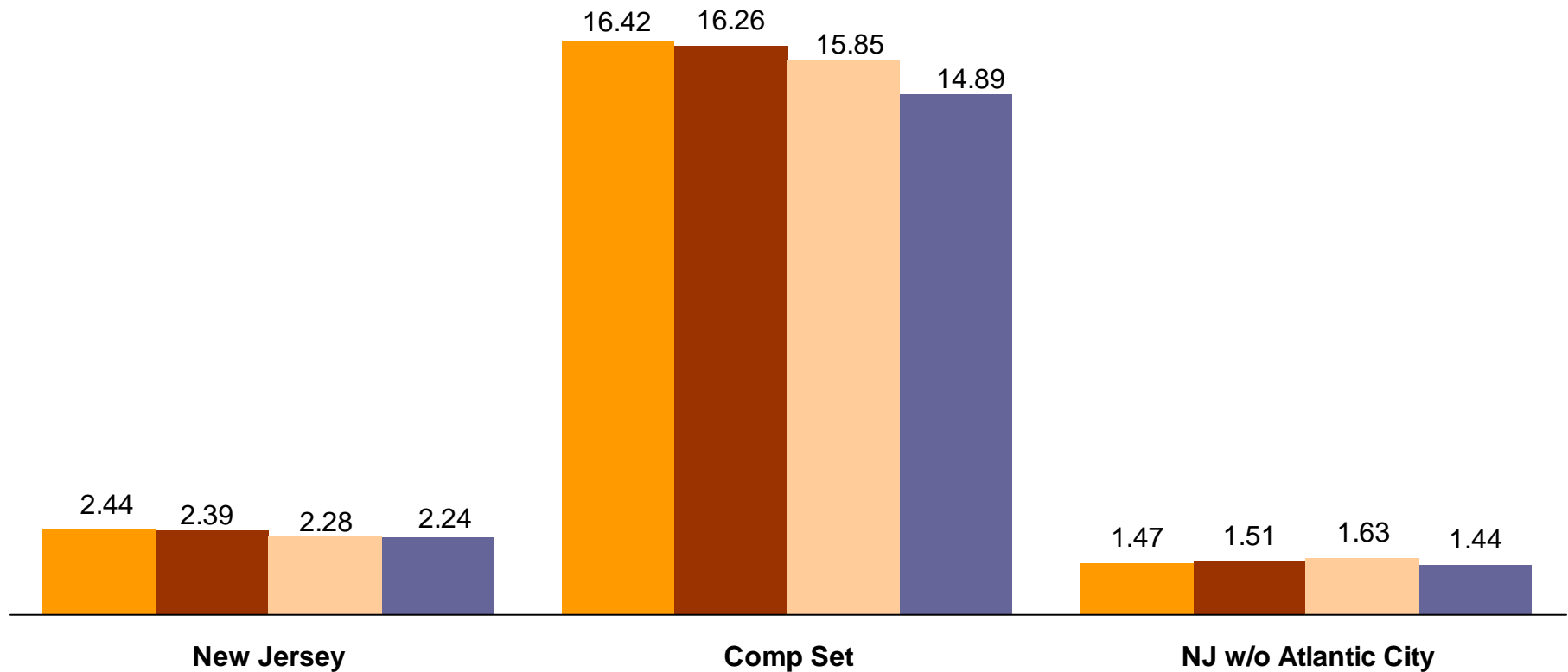
■ Stays ■ Person-Stays ■ Person-Days ■ Direct Spending



Share of U.S. Travel: New Jersey and Competitive Set (% of Overnight Leisure in FY2008p)



■ Stays
 ■ Person-Stays
 ■ Person-Days
 ■ Direct Spending



Destination Satisfaction/Value Intelligence



- In DKSA's *PERFORMANCE/Monitor*SM, respondents are asked to rate their stays on the destination overall satisfaction and overall value-for-the-money on a 10-point scale, where 1 is lowest or "poor" and 10 is highest or "excellent".
- The following chart shows the destination and each of its travel segments' satisfaction and value ratings. The chart plots the percentage of top three (net) ratings which are considered "high" ratings.
- The matrix shows the location of each destination in relation to the four combinations of low or high satisfaction, and low or high value. The four combinations create quadrants using the nationwide averages for high satisfaction and high value ratings.

Low Satisfaction, High Value	High Satisfaction, High Value
Low Satisfaction, Low Value	High Satisfaction, Low Value

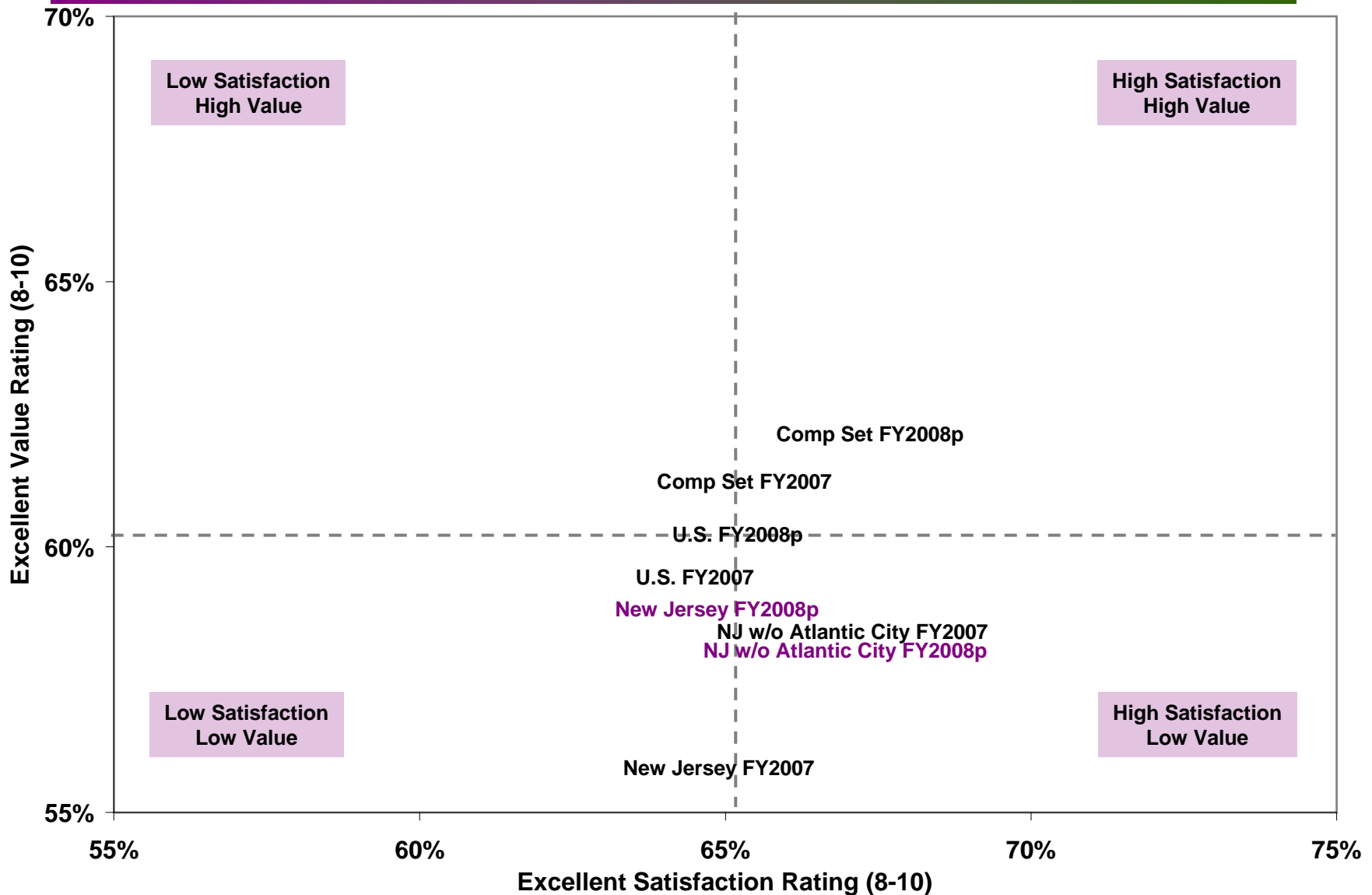
- Destinations falling into the High Satisfaction, High Value quadrant have the most loyal visitors. Those visitors are most likely not only to return, but also register higher per stay spending and are most likely to provide invaluable word-of-mouth by recommending the destination to others.

Destination Satisfaction/Value Intelligence (cont.)



- New Jersey Overnight Leisure satisfaction (7.6) and value-for-the-money (7.4) ratings remained relatively flat in FY2008p over FY2007. This trend was also observed by the average U.S. destination and the Competitive Set, placing slightly above New Jersey in both rating scales.
- When excluding Atlantic City, New Jersey was rated slightly better in both satisfaction (7.8) and value-for-the-money (7.5).
- New Jersey's excellent satisfaction ratings remained flat at 65% in FY2008p; tied with the average U.S. destination.
- In terms of value-for-the-money, New Jersey's excellent ratings increased to a five year high of 58%, up from 55% in FY2007. Despite peaking in FY2008p, New Jersey and NJ w/o Atlantic City were rated below the Competitive Set.

Excellent Destination Satisfaction vs. Value Ratings: U.S., New Jersey and Competitive Set (% of Overnight Leisure Person-Stay in FY2007 vs. FY2008p)







Demographics

New Jersey continued to attract **slightly older Overnight Leisure visitors (48 years)** than those of the **average U.S. destination (45 years) and Competitive Set (45 years)**.

- When excluding Atlantic City, which skews toward older visitors; the average age of New Jersey visitors dropped to 45 years

The **majority or two-fifths** of New Jersey Overnight Leisure visitors were between **35-54 years of age**.

- Represented an even larger share when excluding Atlantic City
- Spent significantly more per trip (\$1,009) than the average New Jersey travel party (\$892)
- Most lucrative age group based on Trip-Dollars spent in relation to travel party volume

One-third of New Jersey Overnight Leisure visitors belong to the **55+ age group** and one-fourth if Atlantic City is excluded.

- Attracted a significantly greater share than the Competitive Set
- Reliable source of Trip-Dollars, however, the 55+ age group spent less per trip (\$783) than the average New Jersey travel party (\$892)

The **remaining or one-fourth** of New Jersey Overnight Leisure visitors ranged from **18-34 years of age**; substantially smaller than the average U.S. destination and Competitive Set.

New Jersey attracted the **largest proportion** of Overnight Leisure visitors with **no children in household** among the average U.S. destination and Competitive Set.

- When excluding Atlantic City, the same share decreased by ten percentage points



Demographics (cont.)

New Jersey Overnight Leisure visitors **averaged a household income of \$96,264 and \$91,155 when excluding Atlantic City.**

- Significantly higher than the average U.S. destination and Competitive Set
- However, New Jersey reported a decline in its visitors' average household income

Lifestages*

The New Jersey Overnight Leisure travel market was **overwhelmingly represented by visitors belonging to lifestages such as Affluent Mature, Maturing & Free and Affluent Family.**

- Although declining, New Jersey attracted the largest proportion of Affluent Mature visitors among the average U.S. destination and Competitive Set
- Nevertheless, when excluding Atlantic City, New Jersey had one the smallest shares of Affluent Mature but the largest share of Affluent Families in relation to the Competitive Set and average U.S. destination
- Combined, these lifestages represented nearly two-thirds of all Trip-Dollars spent in the State during FY2006-08p

Generations

Boomers continued to dominate the New Jersey Overnight Leisure travel market.

- Significantly greater than the shares of the average U.S. destination and Competitive Set
- Accounted for forty cents out of every dollar spent by New Jersey Overnight Leisure travel parties

GenXers followed in rank, representing one-third of New Jersey Overnight Leisure visitors.

- Despite decreasing, NJ w/o Atlantic City attracted a significantly larger share of GenXers than the State as a whole

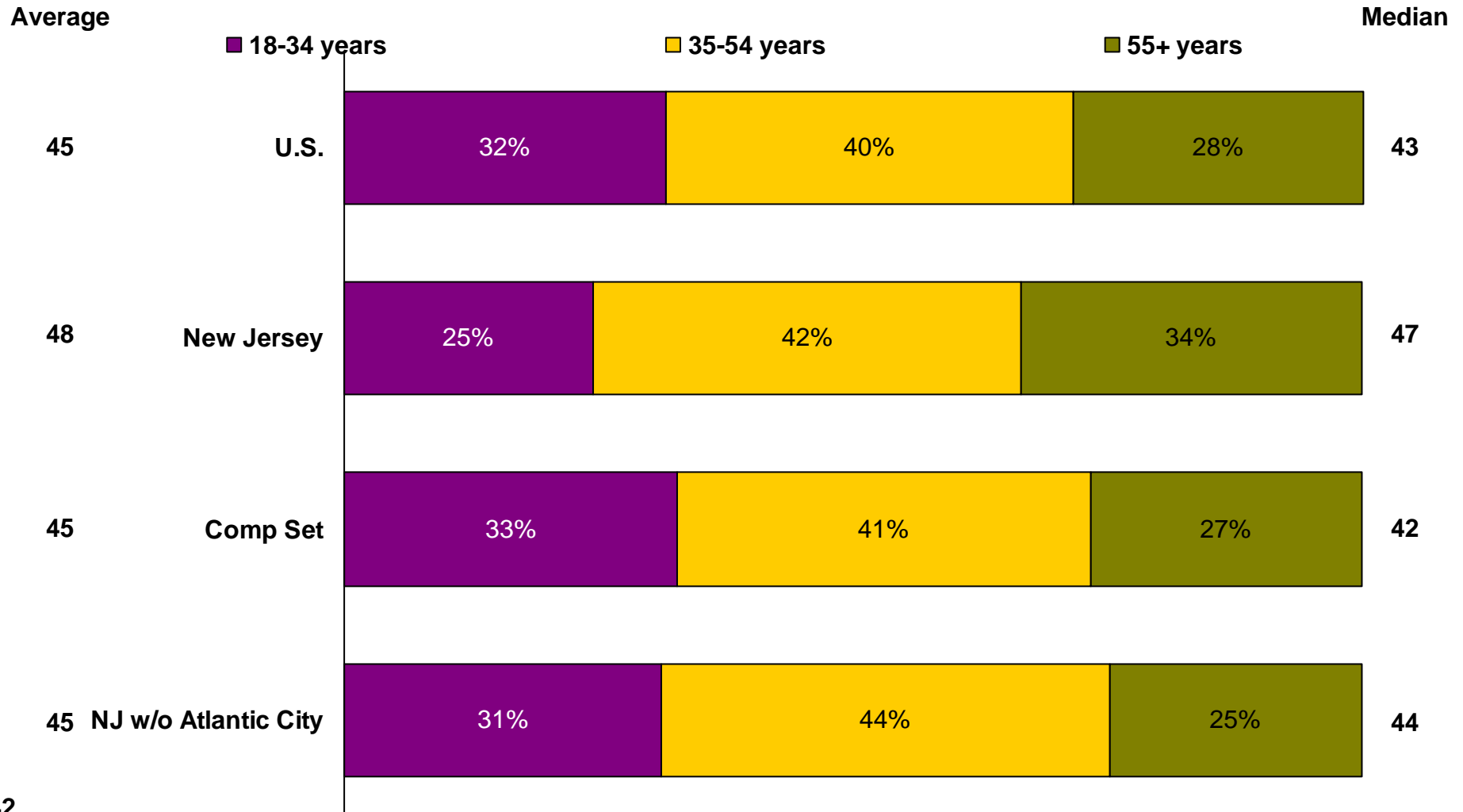


Generations (cont)

The **remaining one-fourth**, were comprised by **Silent, Millennials and GI.**

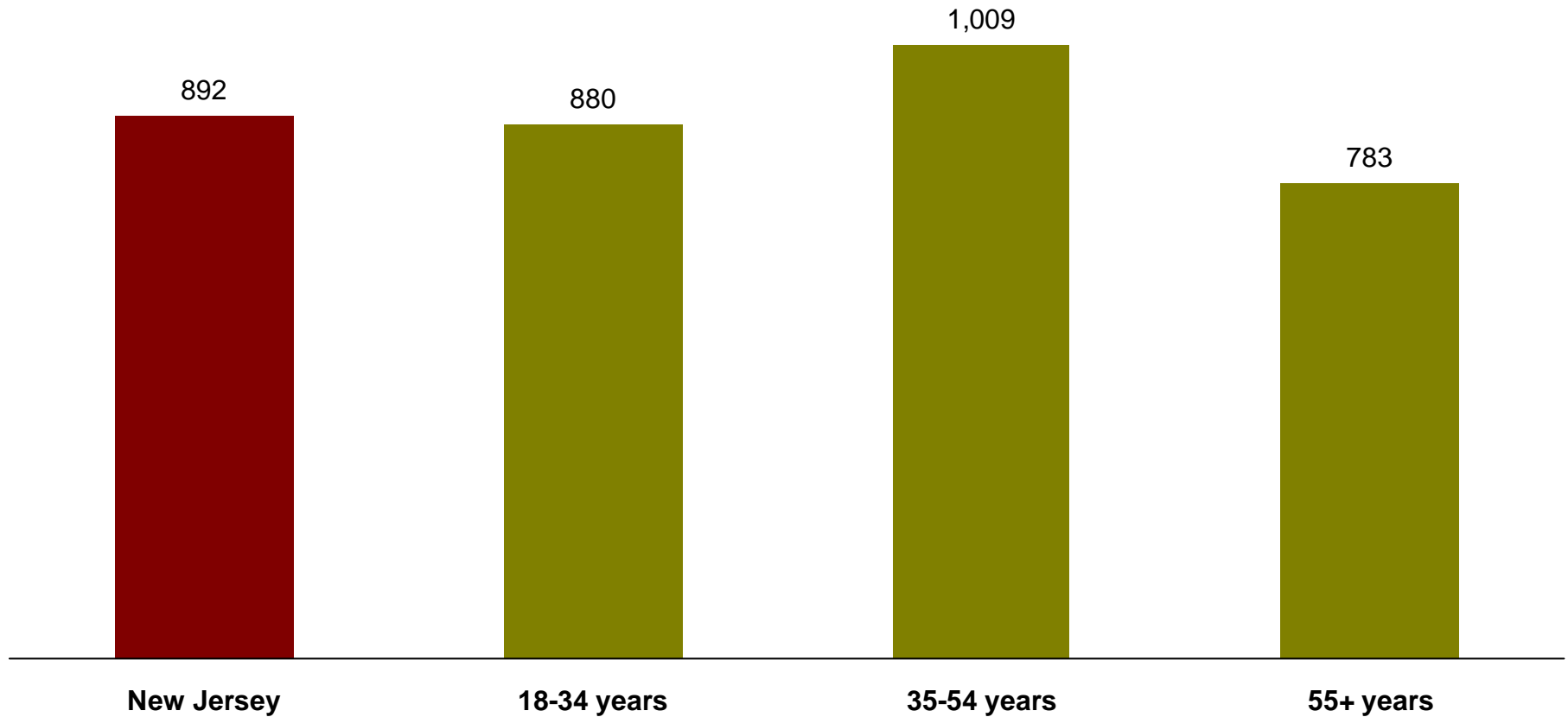
- At one-fifth, New Jersey attracted the largest proportion of Silent visitors among the average U.S. destination and Competitive Set
- Nevertheless, the Sate is losing share of Millennials, placing well below the Competitive Set

Age Distribution: U.S., New Jersey and Competitive Set (% of Overnight Leisure Person-Stays in FY2008p)



New Jersey Avg. Party per Trip Spending by Age

(\$ Overnight Leisure Stays in FY2006-08p)

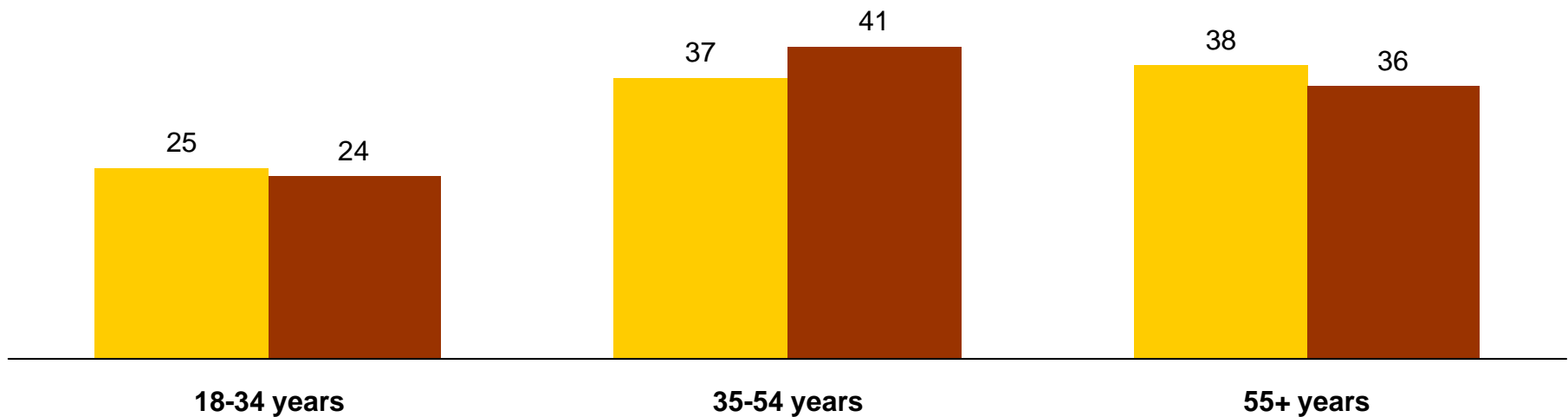


New Jersey Age Comparison (% of Overnight Leisure in FY2006-08p)

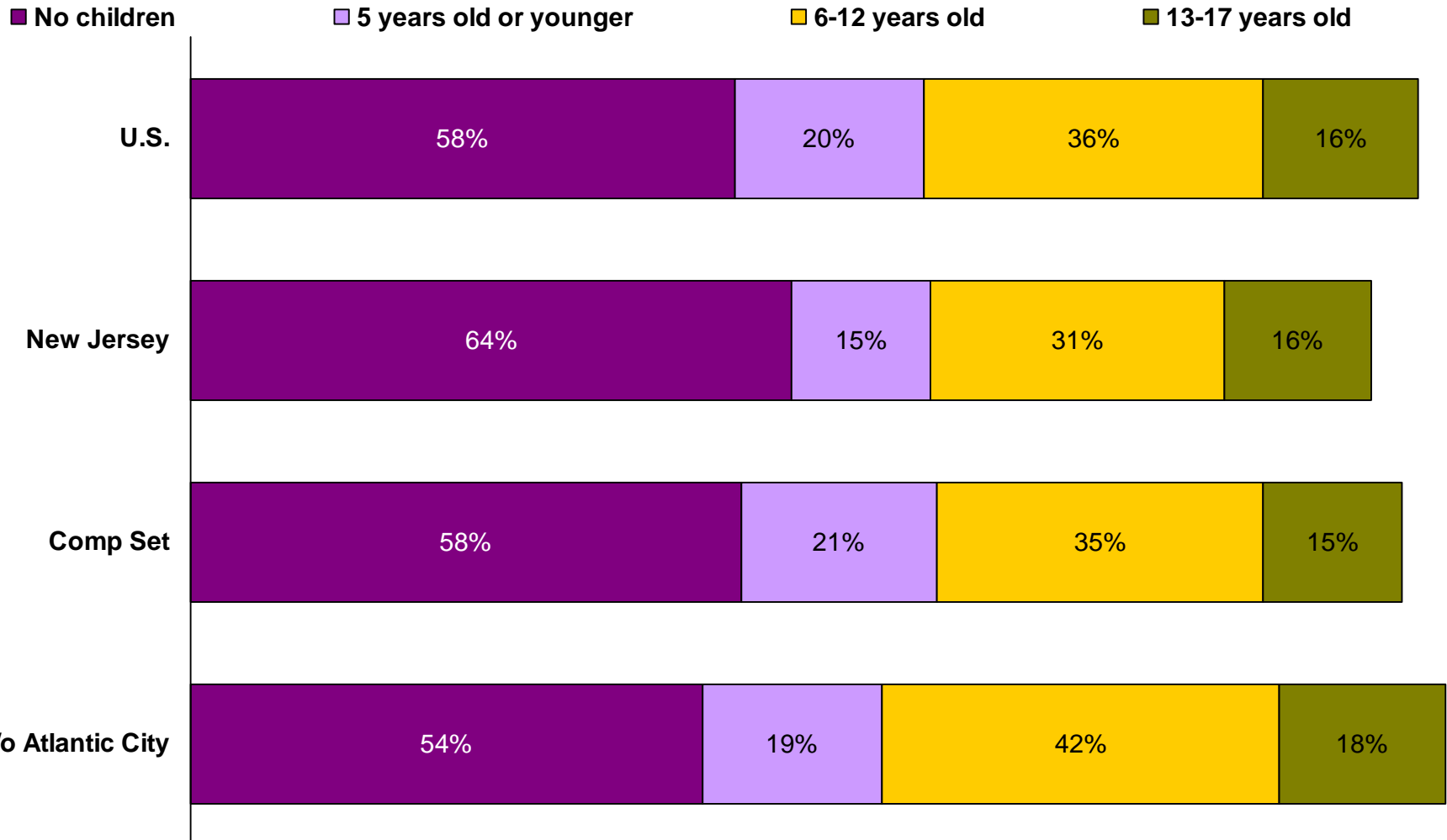


■ Stays Based

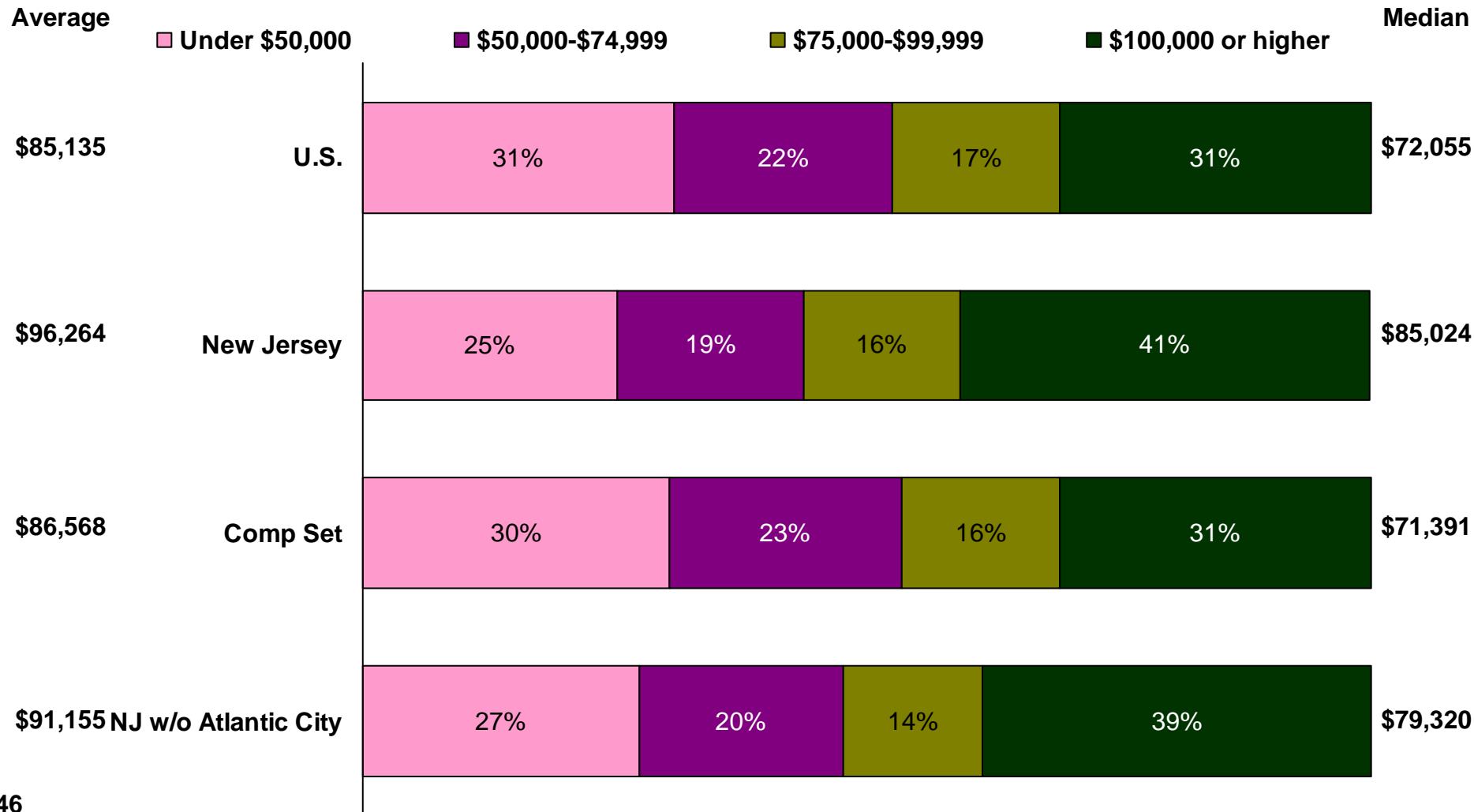
■ Trip-Dollars Based



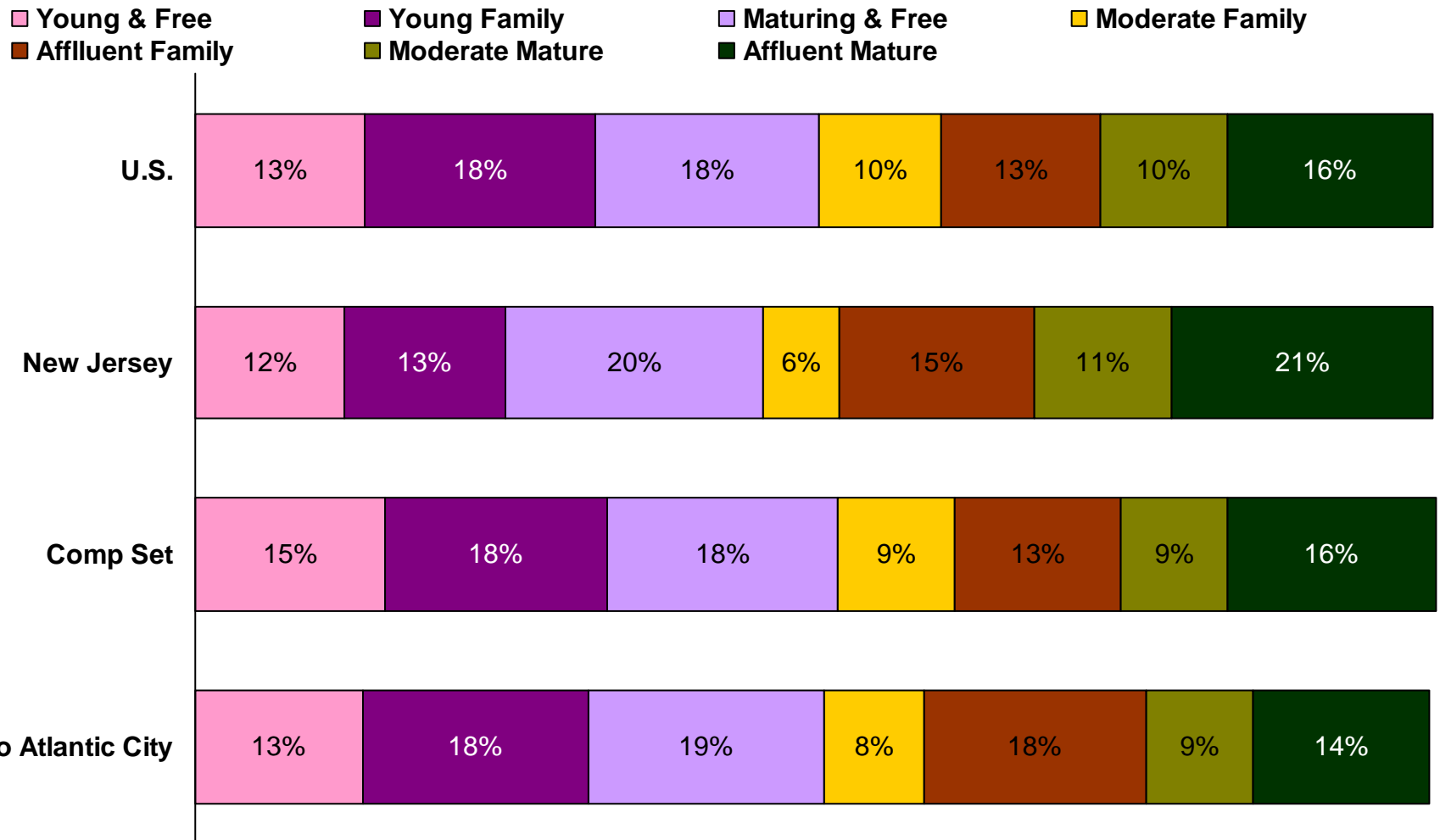
Distribution of Children in Household: U.S., New Jersey and Competitive Set (% of Overnight Leisure Person-Stays in FY2008p)



Household Income Distribution: U.S., New Jersey and Competitive Set (% of Overnight Leisure Person-Stays in FY2008p)

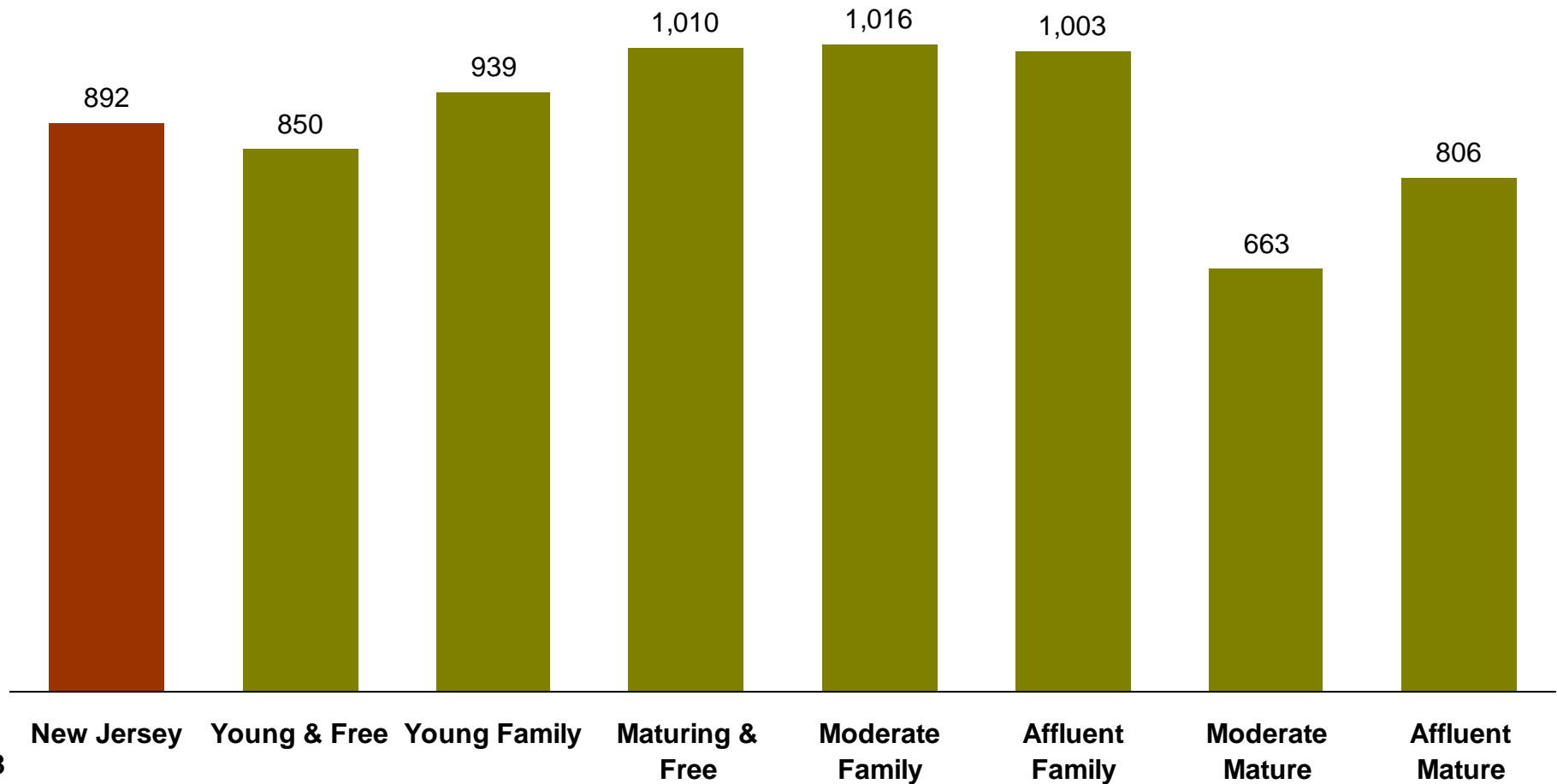


Lifestage Distribution: U.S., New Jersey and Competitive Set (% of Overnight Leisure Person-Stays in FY2008p)



New Jersey Avg. Party per Trip Spending by Lifestage

(\$ Overnight Leisure Stays in FY2006-08p)

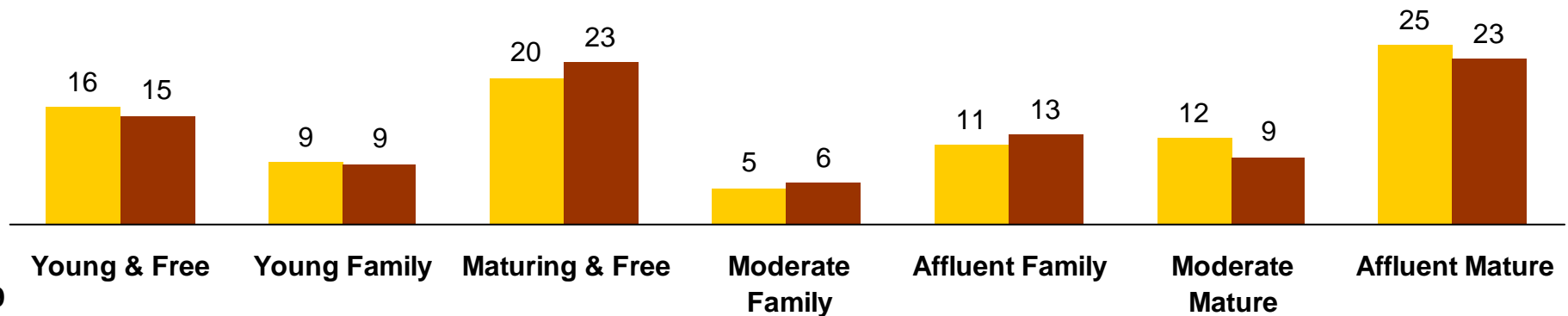


New Jersey Lifestage Distribution (% of Overnight Leisure in FY2006-08p)

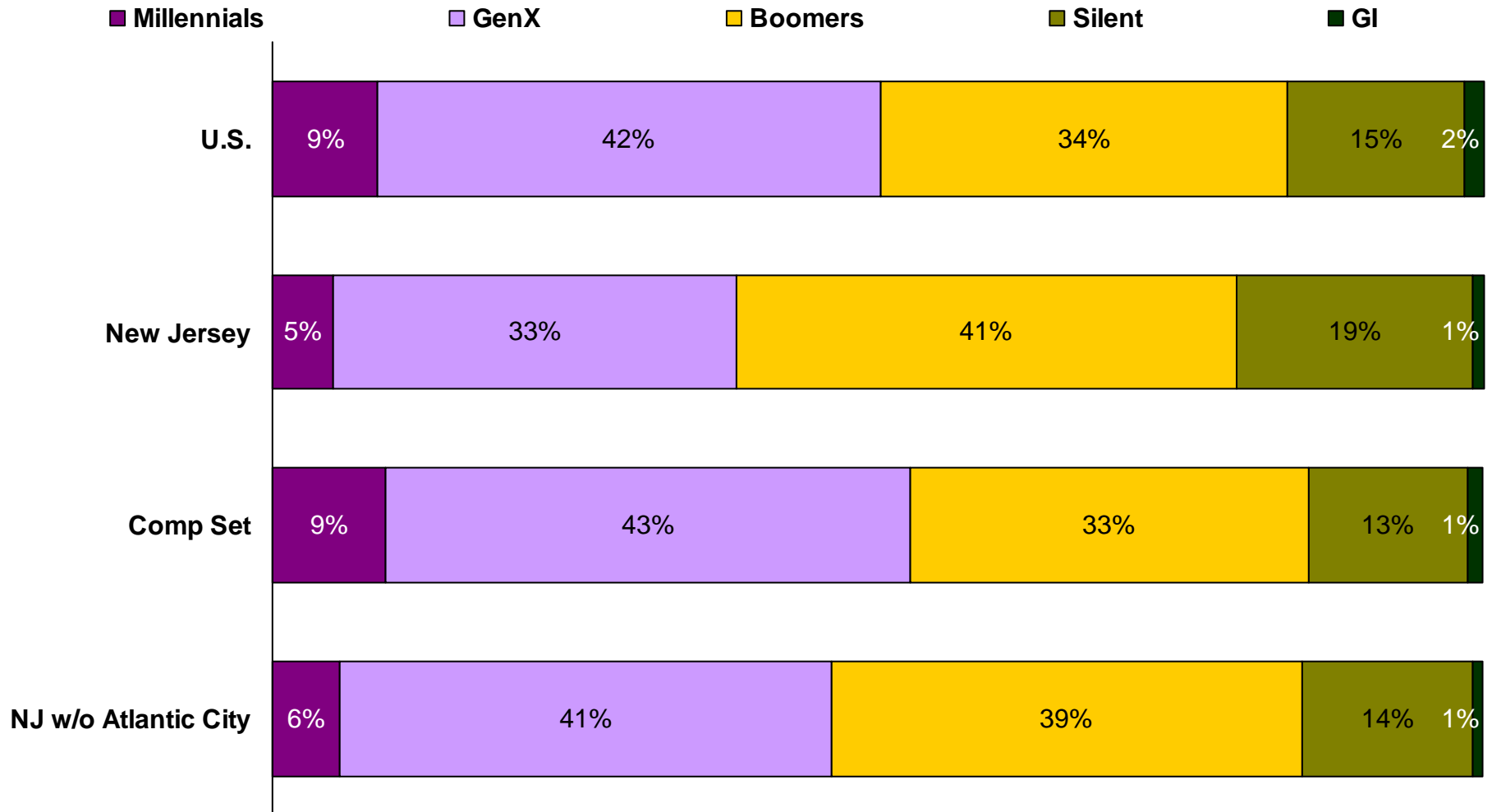


■ Stays Based

■ Trip-Dollars Based

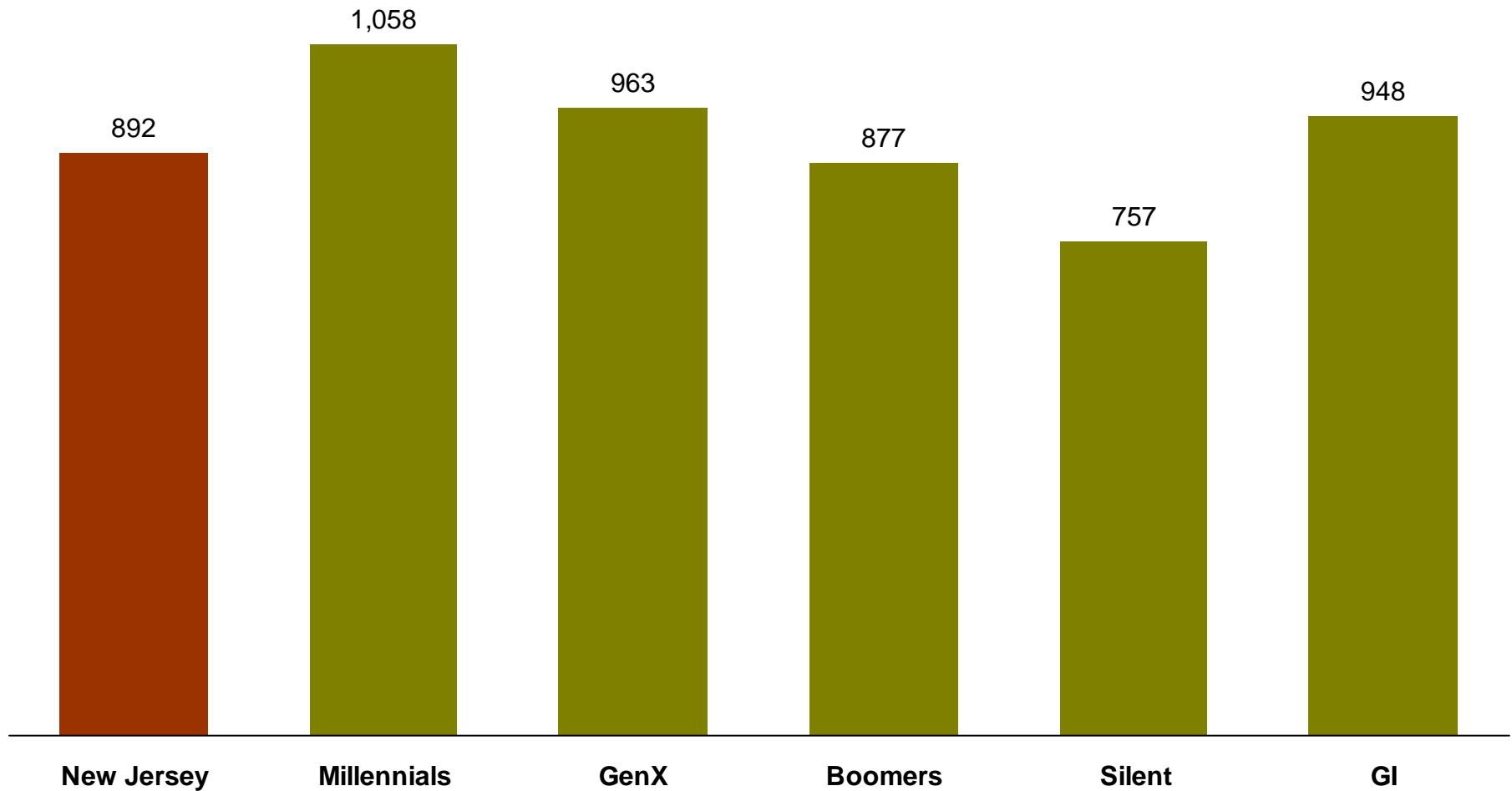


Traveler Generation Distribution: U.S., New Jersey and Competitive Set (% of Overnight Leisure Person-Stays in FY2008p)



New Jersey Avg. Party per Trip Spending by Generation

(\$ Overnight Leisure Stays in FY2006-08p)



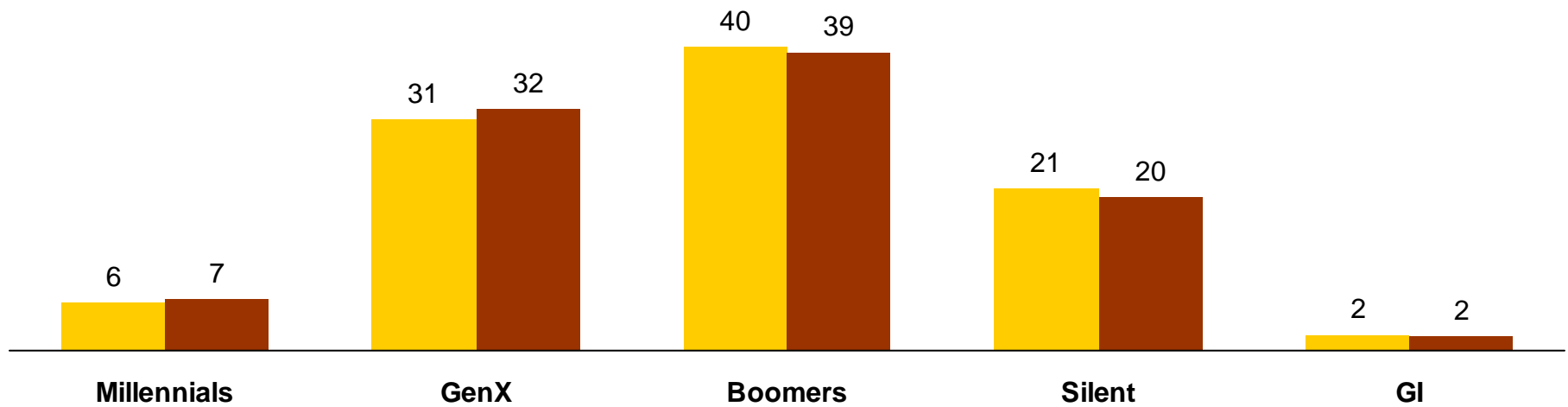
New Jersey Traveler Generation Comparison

(% of Overnight Leisure in FY2006-08p)



■ Stays Based

■ Trip-Dollars Based







Purpose of Stay

Over half of New Jersey Overnight Leisure visitors **visited the State for a Vacation in FY2008p.**

- One-third visited for a Getaway Weekend and one-fifth for a General Vacation
- Led the Competitive Set and average U.S. destination in share of Getaway Weekend and General Vacation
- Excluding Atlantic City, New Jersey share of Getaway Weekend and General Vacation were much smaller, but still greater than the Competitive Set average
- Getaway Weekend accounted for the largest proportion of Trip-Dollars, however, General Vacation proved to be more profitable based on a higher share of Trip-Dollars in relation to travel party volume

One-fourth traveled to **Visit Friends or Relatives (VFR).**

- Steadily increasing since FY2006
- NJ w/o Atlantic City attracted a much larger share of VFR, leading the average U.S. destination and Competitive Set
- Low spenders, spending substantially less per trip (\$681) than the average New Jersey travel party (\$892)

The remaining or **one out of five** traveled for either a **Special Event or Other Personal** reason.

- Matched the average U.S. destination and Competitive Set in share of Other Personal, but a significantly lower share of visitors traveling for Special Events

Party Composition

On average, the New Jersey Overnight Leisure travel party in FY2008p **consisted of 2.31 persons, slightly smaller** than those of the **average U.S. destination (2.45 persons)** and **Competitive Set (2.40 persons).**

- NJ w/o Atlantic City travel parties were slightly larger (2.44 persons)



Party Composition (cont.)

Couples* continued to dominate (41%) the New Jersey Overnight Leisure travel market.

- Significantly larger than the Competitive Set, but lowest share in NJ w/o Atlantic City
- However, declined for the second consecutive year, reaching a five year low in FY2008p
- Largest source of Trip-Dollars, accounting for forty-one cents out of every dollar spent in FY2006-08p

Adults traveling alone (24%) and Families (21%) followed.

- Adults traveling alone remained flat over FY2007, while Families increased to a five year high
- Nevertheless, New Jersey continued to attract the smallest share of Families when measured against the Competitive Set
- Adults traveling alone were the least profitable segment, while Families were the most profitable, contributing a much larger share of Trip-Dollars than travel party volume

The remaining travel parties were comprised of **MM/FF (7%) or Three or More Adults (7%)**.

Length of Stay

The typical New Jersey Overnight Leisure travel party stayed an **average of 2.62 nights, relatively shorter** than those of the **average U.S. destination (2.98 nights) and Competitive Set (2.83 nights)**.

- However, the average length of stay increased to a five year high in FY2008p
- Excluding Atlantic City, New Jersey travel parties stayed an average of 3.10 nights

Mirroring the purpose of stay, **eight out of ten** New Jersey Overnight Leisure travel parties stayed **less than three nights**.

- Led the average U.S. destination and Competitive Set despite declining to a five year low in FY2008p
- Nevertheless, less than three nights stays represented fewer shares of Trip-Dollars in relation to travel party volume when compared to travel parties staying 4-7 and 8+ nights, making them less valuable to target

* Couples were defined as one male and one female



Average Daily Spending

On average, New Jersey Overnight Leisure visitors **spent \$102 per day** while NJ w/o Atlantic City visitors **spent \$93 per day**.

- Led the Competitive Set (\$99)
- However, New Jersey daily visitor spending declined (-8.9%) substantially more than the Competitive Set average (-2.3%)
- Visitors scaled back their daily spending across all categories particularly Miscellaneous (-26.3%) and Entertainment (-22.6%)
- NJ w/o Atlantic City visitors also reduced (-7.6%) their overall daily spending in FY2008p, mostly in Entertainment (-28.2%) and Miscellaneous (-19.4%)
- Unlike the average U.S. destination and Competitive Set, the largest proportion of New Jersey Overnight Leisure visitor spending went towards Food (25%), followed by Transportation (22%), Entertainment (18%), Room (15%), Shopping (14%) and Miscellaneous expenses (6%)

Activities

New Jersey Overnight Leisure visitors have a **substantially higher propensity** to participate in activities involving **Gambling, Beach Waterfront, Shows (auto, boat, antique, etc.), Concert, Play, Dance, Night Life, Group Tour and Entertainment** than those to the **average U.S. destination and Competitive Set**.

- Despite declining to a five year low in FY2008p, the majority of New Jersey Overnight Leisure visitors participated in Gambling (31%), followed by Dining (30%), Entertainment (25%), Beach, Waterfront (23%), Shopping (19%), Night Life (14%), Sightseeing (12%) and Concert, Play, Dance (10%)
- Out of those and excluding expenditure based activities*, Beach, Waterfront, Night Life, Sightseeing and Concert, Play, Dance proved to be most valuable, as fewer travel parties contributed higher shares of Trip-Dollars

* Expenditure based activities were defined as Dining, Entertainment and Shopping, which were based on minimum spending levels



Activities (cont.)

- When excluding Atlantic City, Dining (30%), Beach ,Waterfront (27%), Sightseeing (14%), Shopping (20%), Entertainment (18%) had the highest activity participation rates, while Gambling (4%) as expected had one of the lowest

Main Mode of Transportation

Due to the proximity of its origin markets, **nine out of ten** New Jersey Overnight Leisure visitors **arrived by auto** in FY2008p.

- Leads the average U.S. destination and Competitive Set
- Even greater share of auto arrivals when Atlantic City is excluded

Trip Timing

The largest proportion of New Jersey Overnight Leisure visitors arrived in the **Third Quarter (35%), followed by the Second (23%), First (23%) and Fourth Quarter (19%).**

- NJ w/o Atlantic City attracted an even larger share (42%) of Third Quarter arrivals, significantly greater than the Competitive Set and the average U.S. destination
- On a micro level, August (17%), July (11%), June (9%) and December (9%) were the most popular months of travel for New Jersey Overnight Leisure visitors
- On average, Travel parties arriving in the Third Quarter spent substantially more per trip (\$1,246) than the average New Jersey travel party (\$892)
- Conversely, Third Quarter arrivals proved to be most valuable, based on a positive Trip-Dollars (40%) vs. Stays (30%) ratio

Accommodation Type

Over half of New Jersey Overnight Leisure visitors stayed at **Hotels** in FY2008p, **significantly more** than the **average U.S. destination and competing states.**

- However, declined for the second consecutive year, reaching a five year low in FY2008p



Accommodation Type (cont.)

- NJ w/o Atlantic City attracted the smallest proportion of Hotel stays in relation to the Competitive Set
- The majority opted for Economy properties, nevertheless, New Jersey attracted the largest share of visitors staying at High-End properties among the average U.S. destination and Competitive Set
- Most lucrative accommodation segment based on a positive Trip-Dollars (63%) vs. Stays (58%) ratio

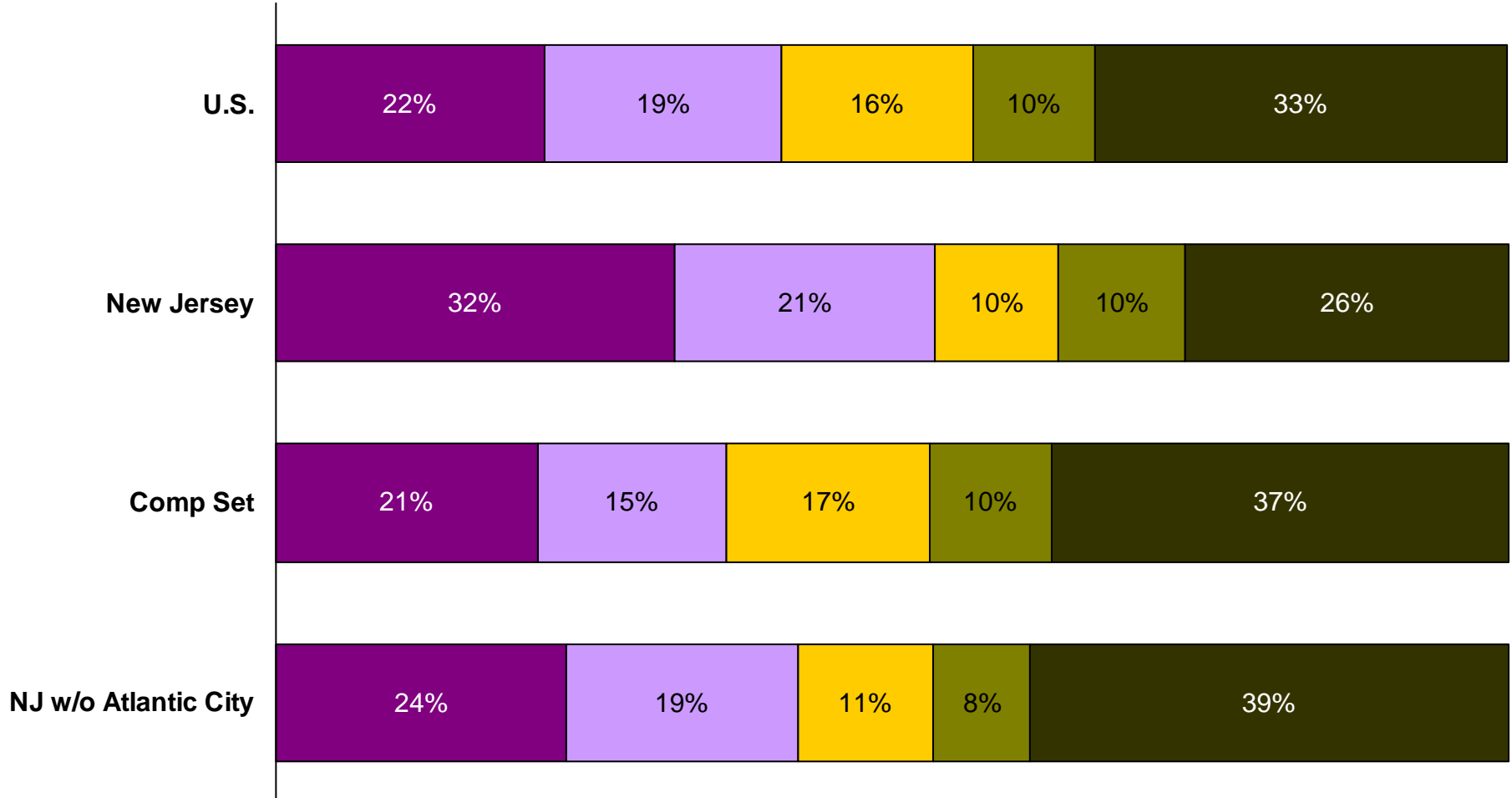
Over **one-fourth** of New Jersey Overnight Leisure visitors **stayed at Private Homes**

- Due to a small proportion of VFRs, New Jersey attracted the smallest share of visitors staying at Private Homes among the Competitive Set and the average U.S. destination
- Conversely, NJ w/o Atlantic City had the largest share of visitors staying at Private Homes in relation to the Competitive Set
- As expected, these travel parties spent substantially less per trip (\$662) than the average New Jersey travel party (\$892)

Purpose of Stay Distribution: U.S., New Jersey and Competitive Set (% of Overnight Leisure Person-Stays in FY2008p)



■ Getaway Weekend ■ General Vacation ■ Special Event ■ Other Personal ■ Visit Friends/Relatives



New Jersey Avg. Party per Trip Spending by Purpose of Stay (\$ Overnight Leisure Stays in FY2006-08p)

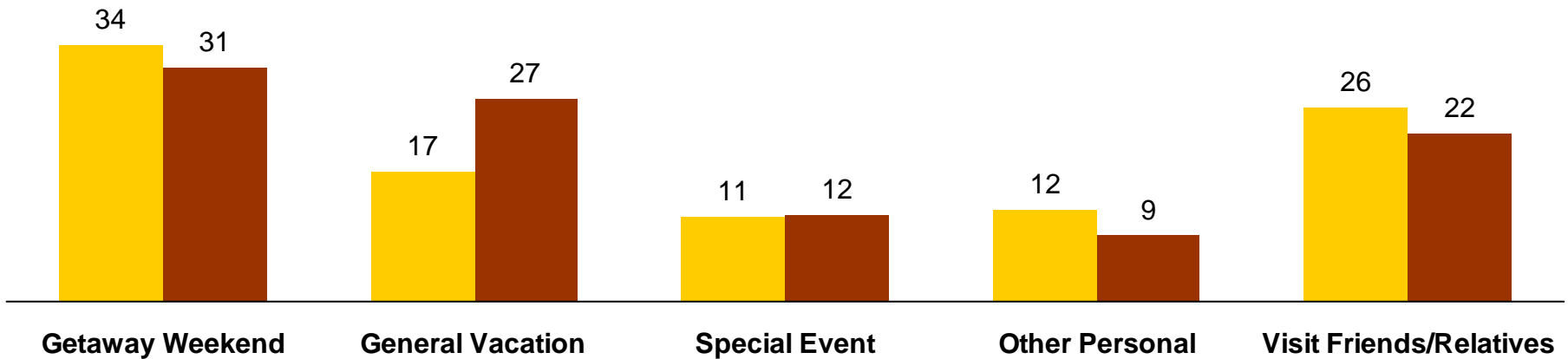


New Jersey Purpose of Stay Comparison (% of Overnight Leisure in FY2006-08p)

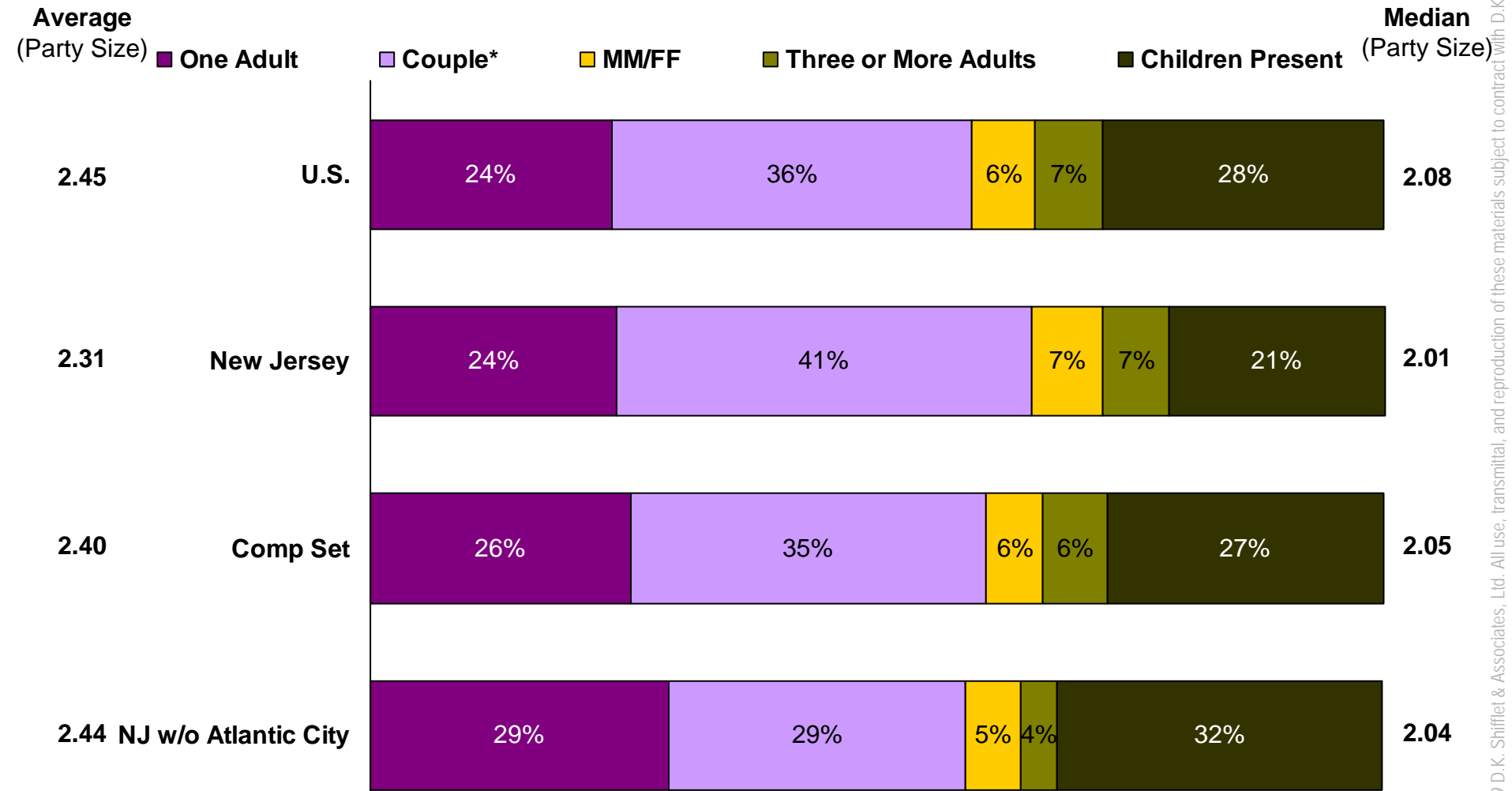


■ Stays Based

■ Trip-Dollars Based



Travel Party Composition Distribution: U.S., New Jersey and Competitive Set (% of Overnight Leisure Stays in FY2008p)

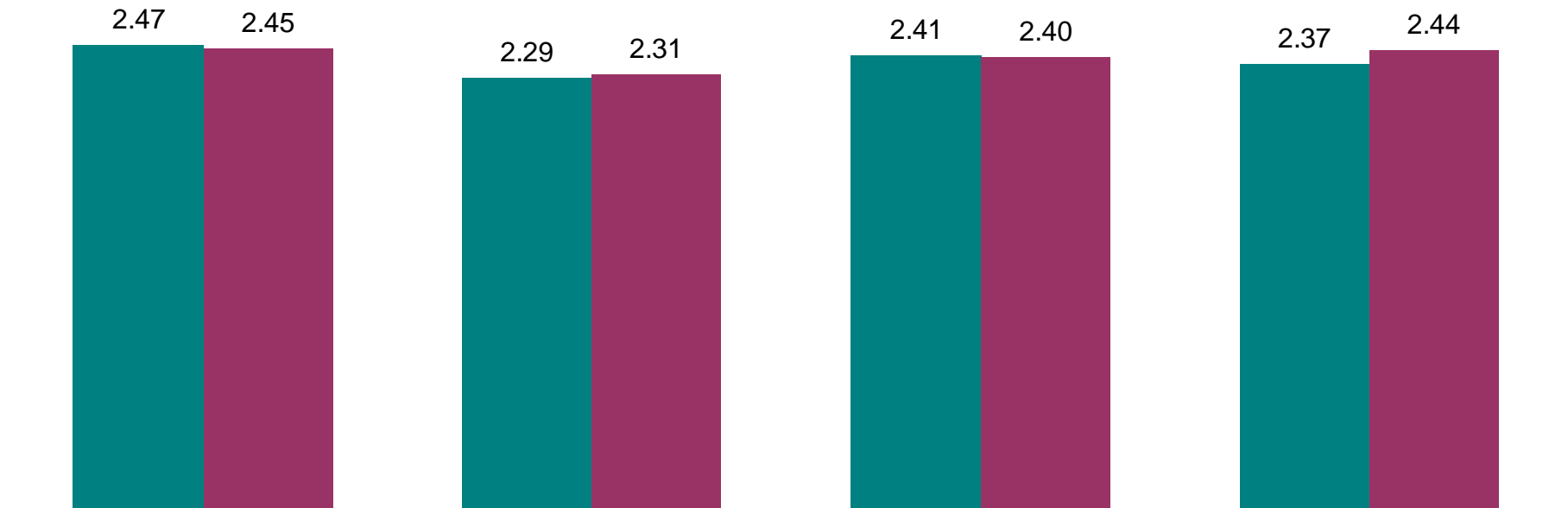


Average Travel Party Size Overview: U.S., New Jersey and Competitive Set (Overnight Leisure Stays)



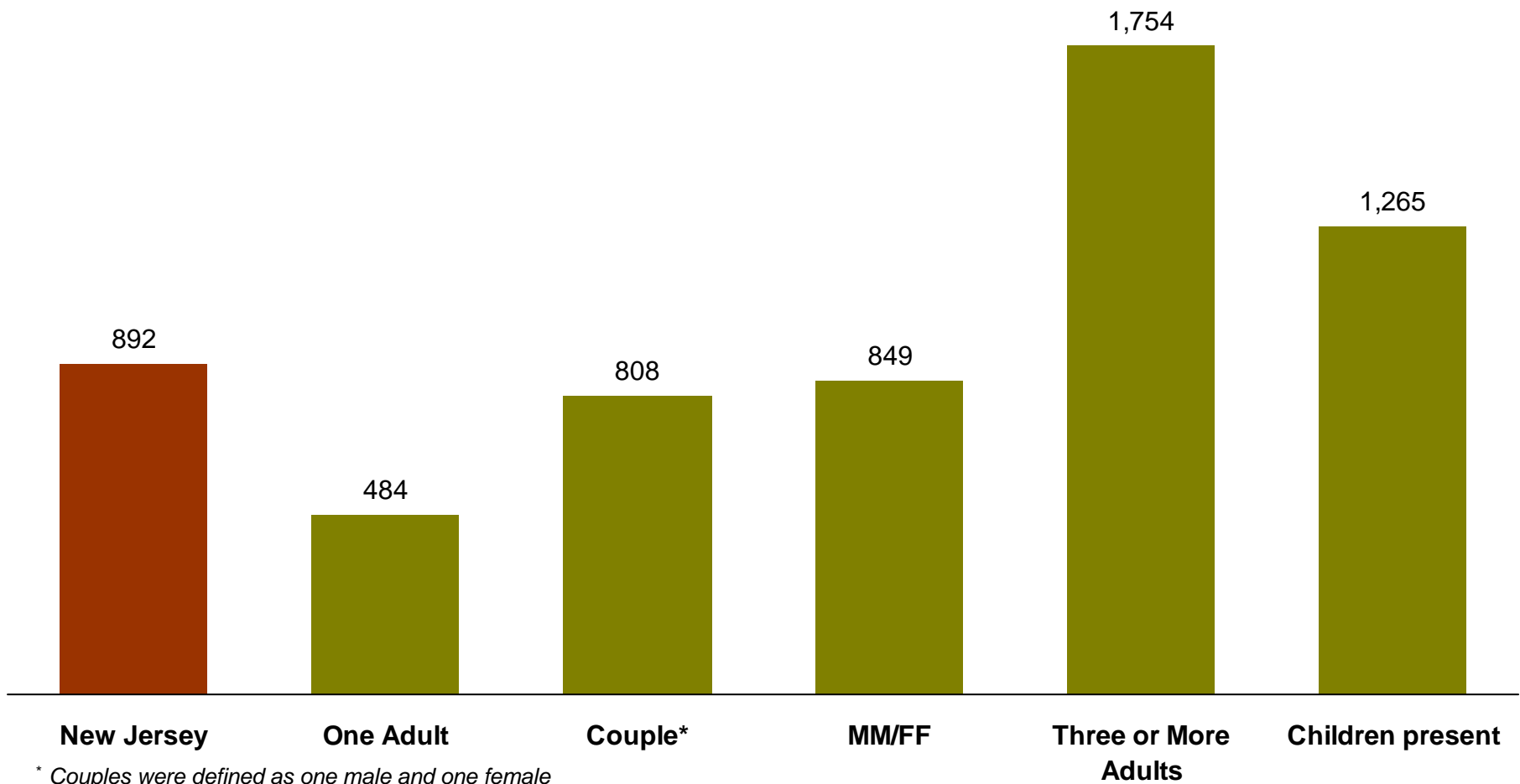
FY2007

FY2008p



New Jersey Avg. Travel Party per Trip Spending by Traveling Party

(\$ Overnight Leisure Stays in FY2006-08p)



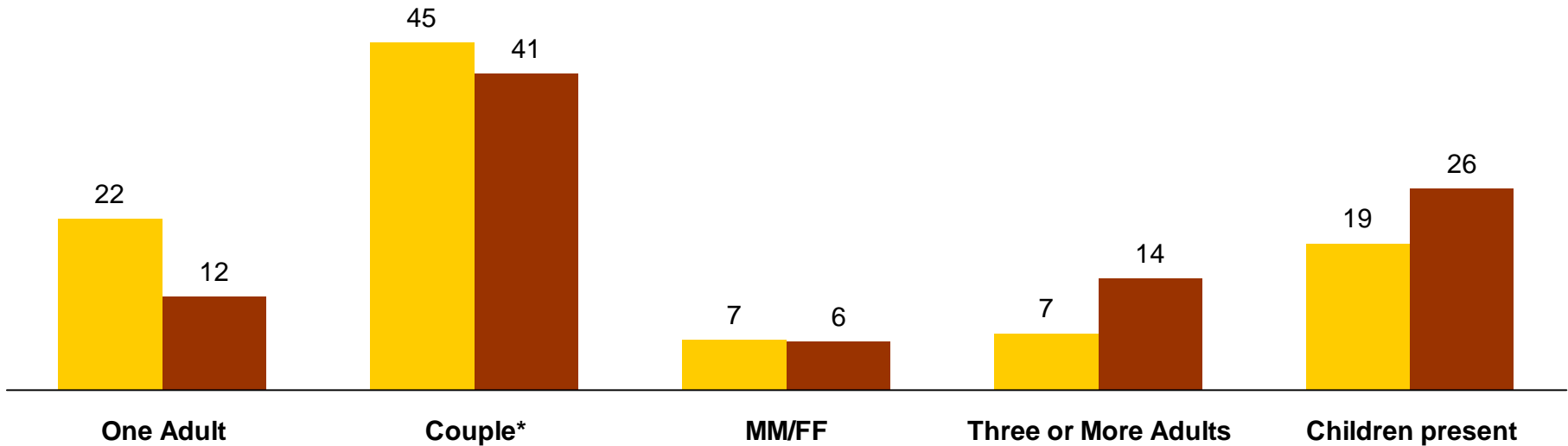
New Jersey Travel Party Composition Comparison

(% of Overnight Leisure in FY2006-08p)

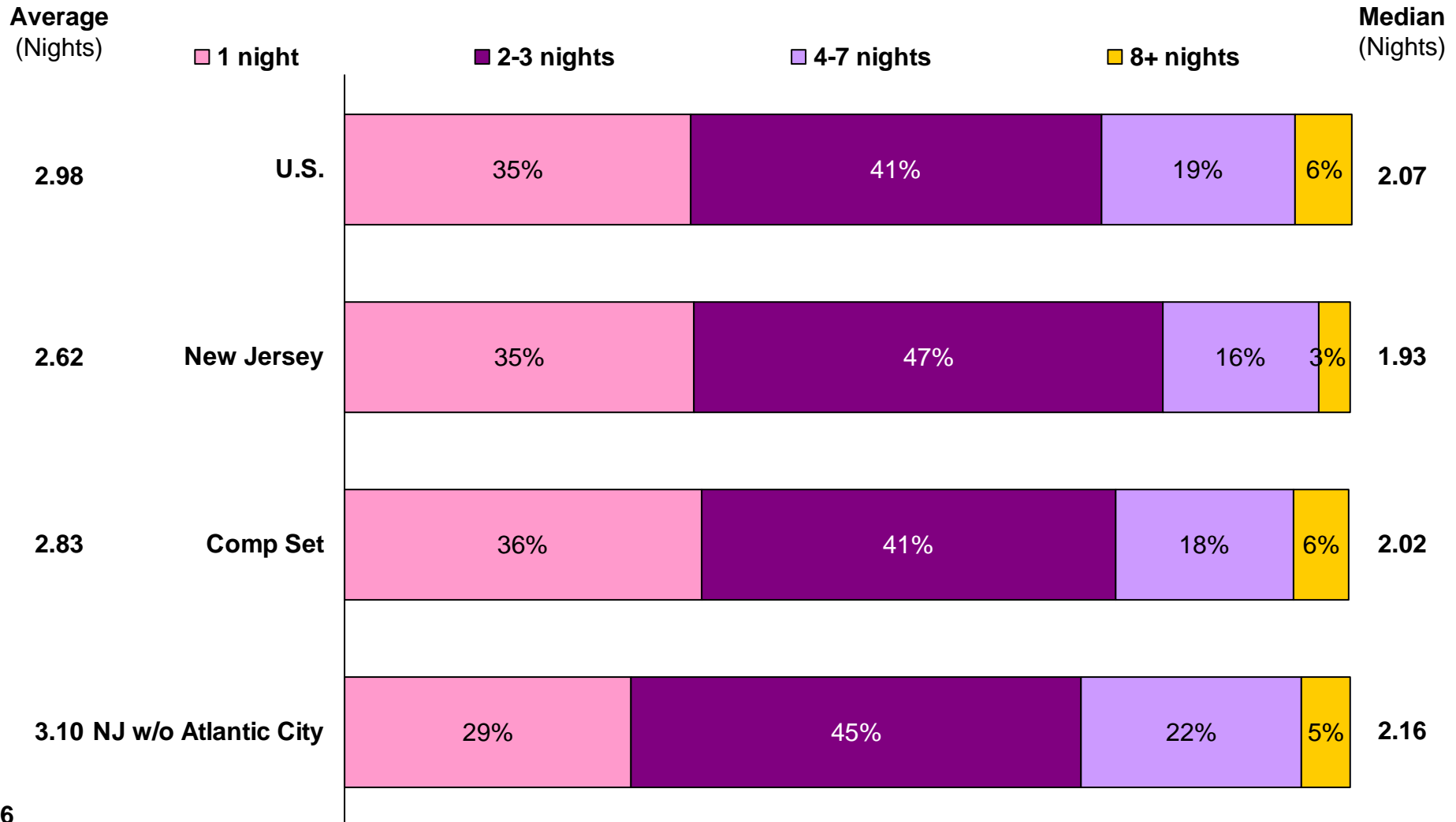


■ Stays Based

■ Trip-Dollars Based



Stay Length Distribution: U.S., New Jersey and Competitive Set (% of Overnight Leisure Stays in FY2008p)

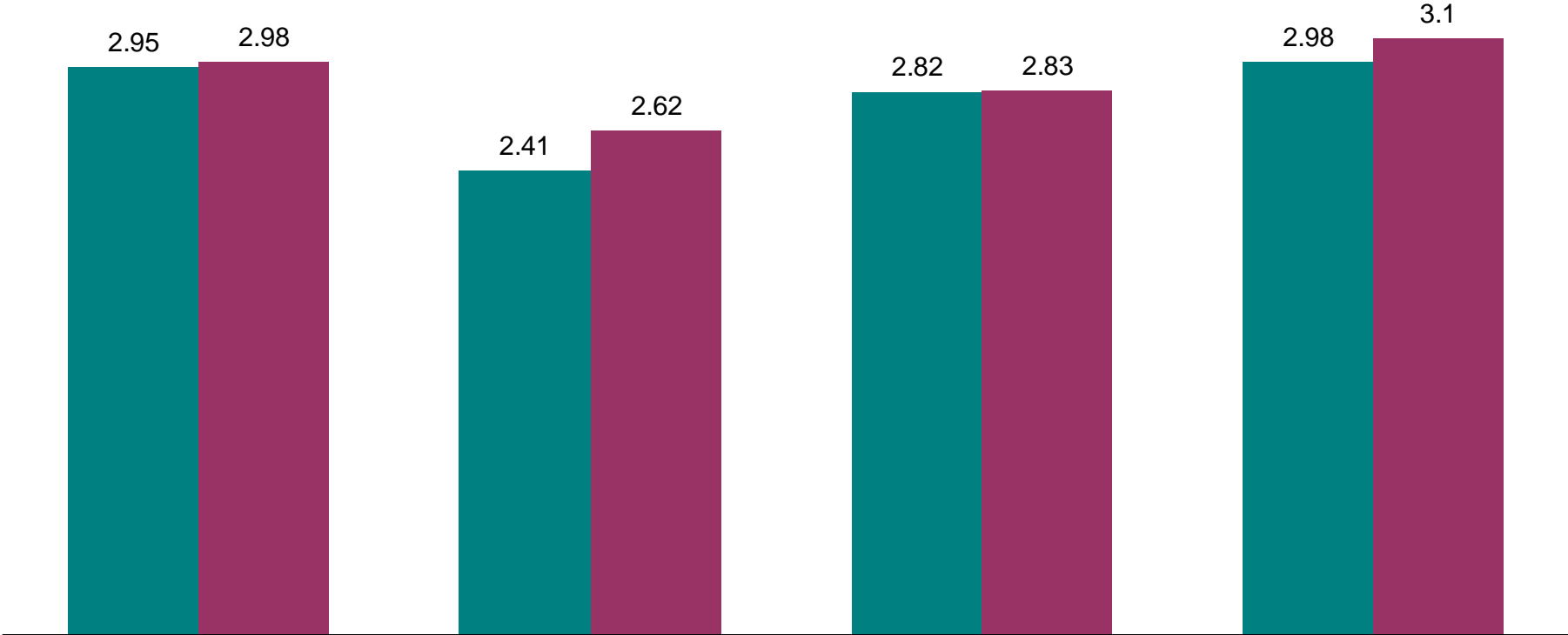


Average Length of Stay:
U.S., New Jersey and Competitive Set
(Overnight Leisure Stays, 1+ night)

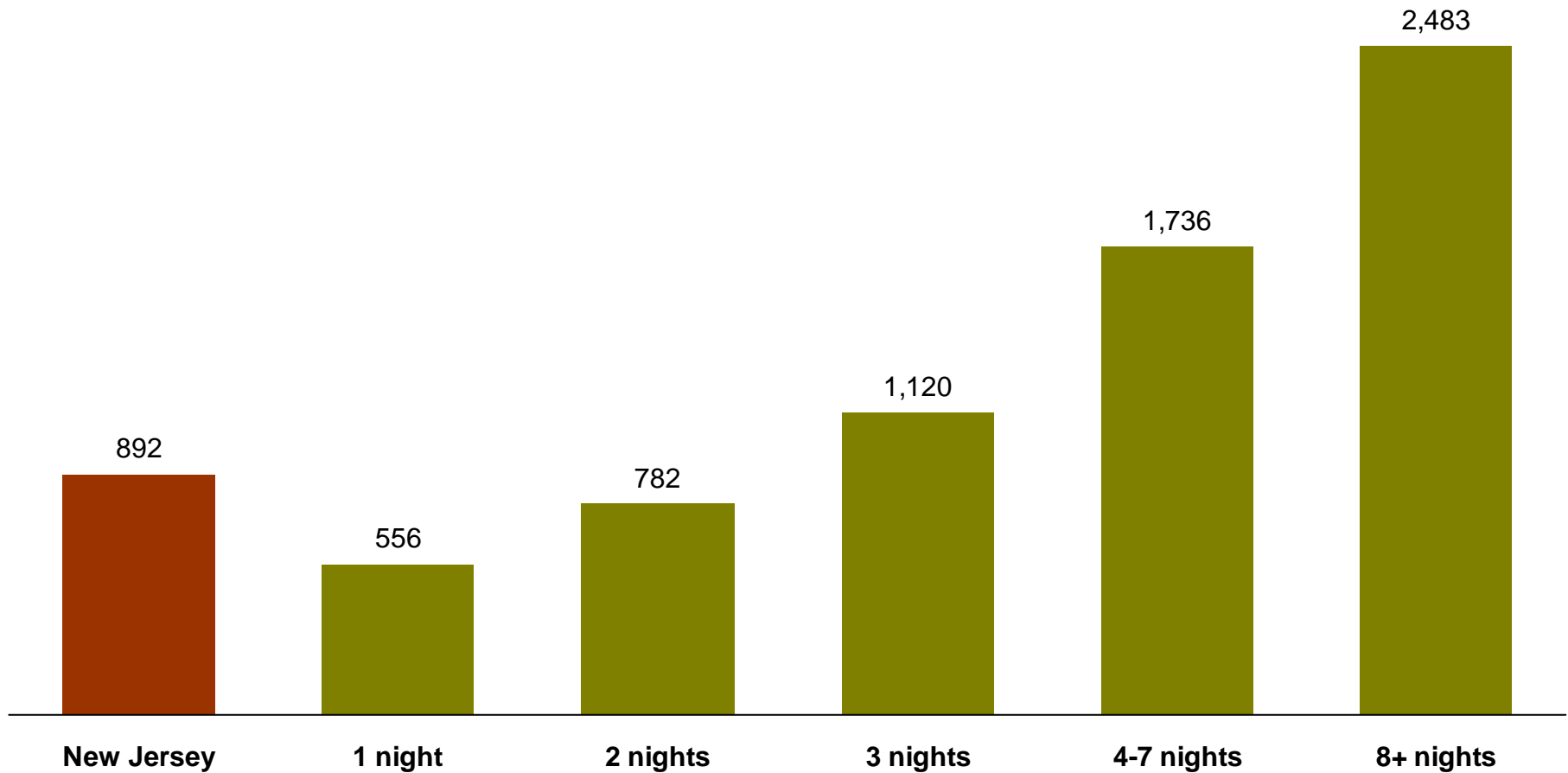


FY2007

FY2008p



New Jersey Avg. Party per Trip Spending by Stay Length (*\$ Overnight Leisure Stays in FY2006-08p*)



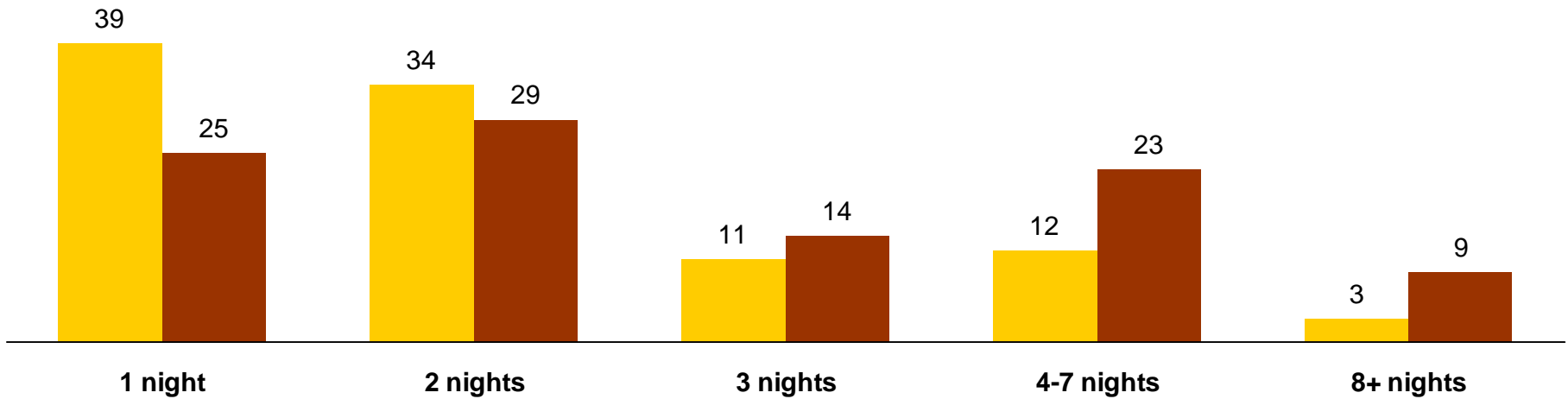
New Jersey Stay Length Comparison

(% of Overnight Leisure in FY2006-08p)

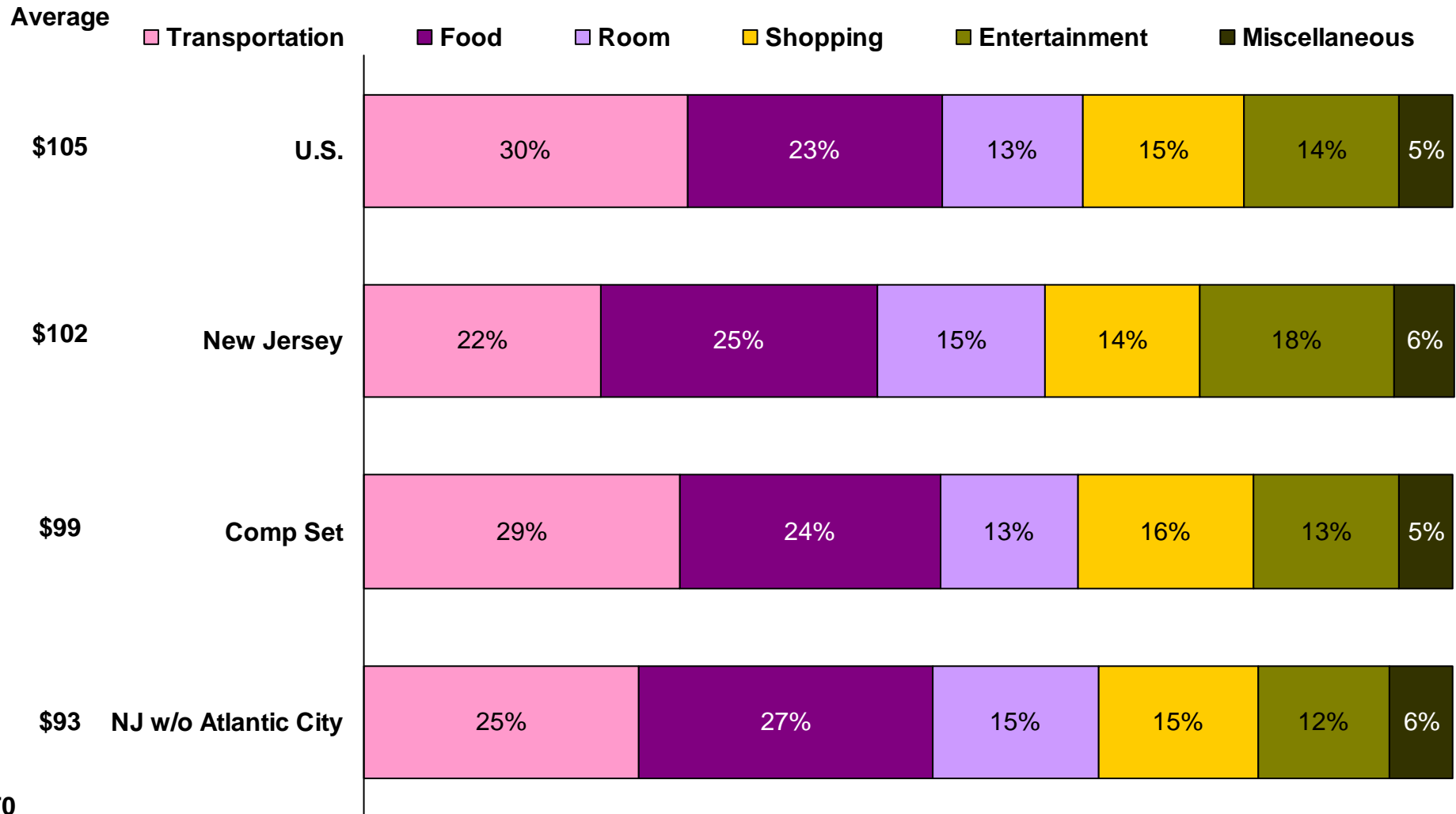


■ Stays Based

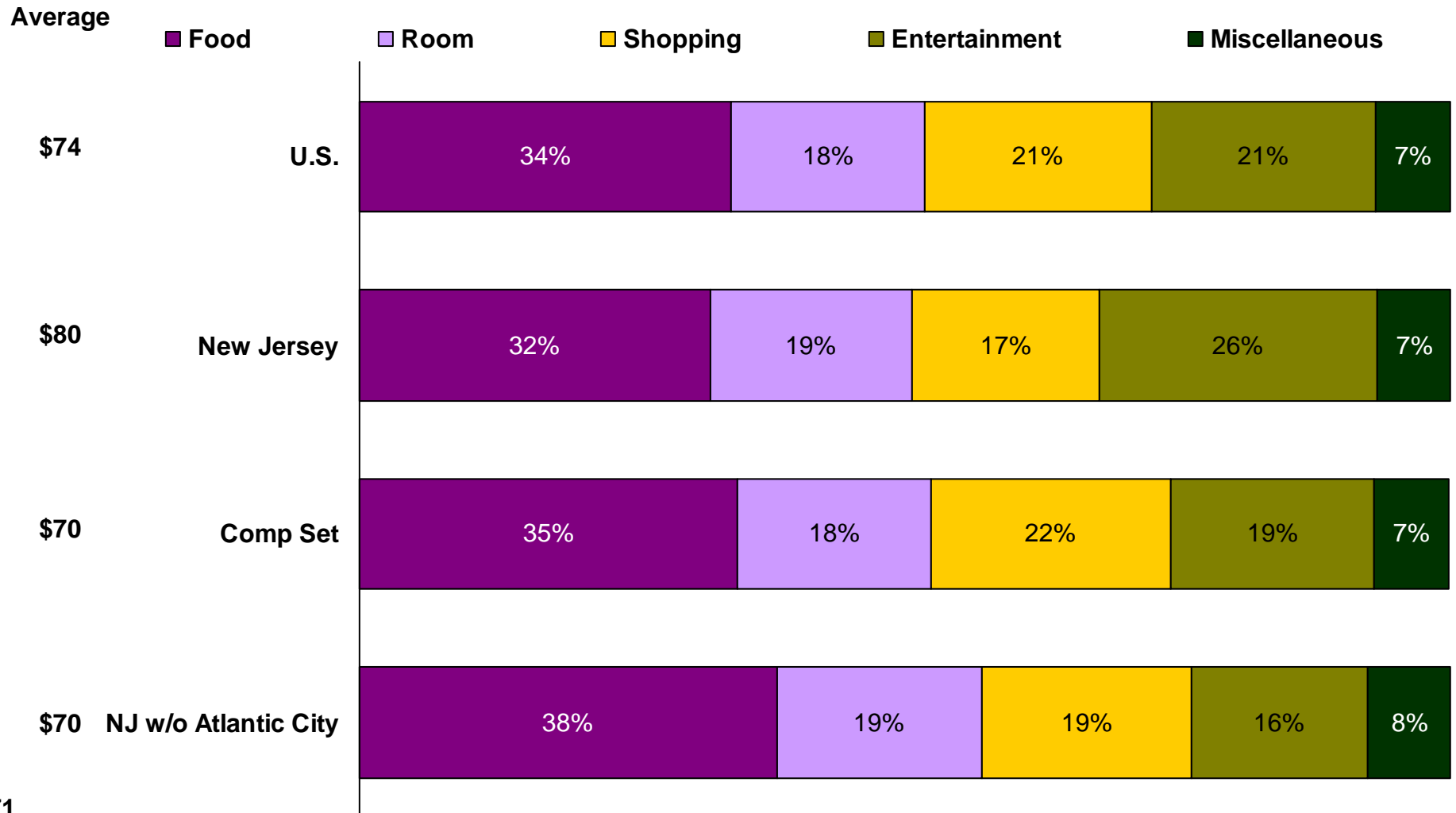
■ Trip-Dollars Based



Daily Spending Per Person by Spending Category: U.S., New Jersey and Competitive Set (% of Overnight Leisure Person-Days in FY2008p)



Daily Spending Per Person by Spending Category: U.S., New Jersey and Competitive Set (% of Overnight Leisure Person-Days in FY2008p)

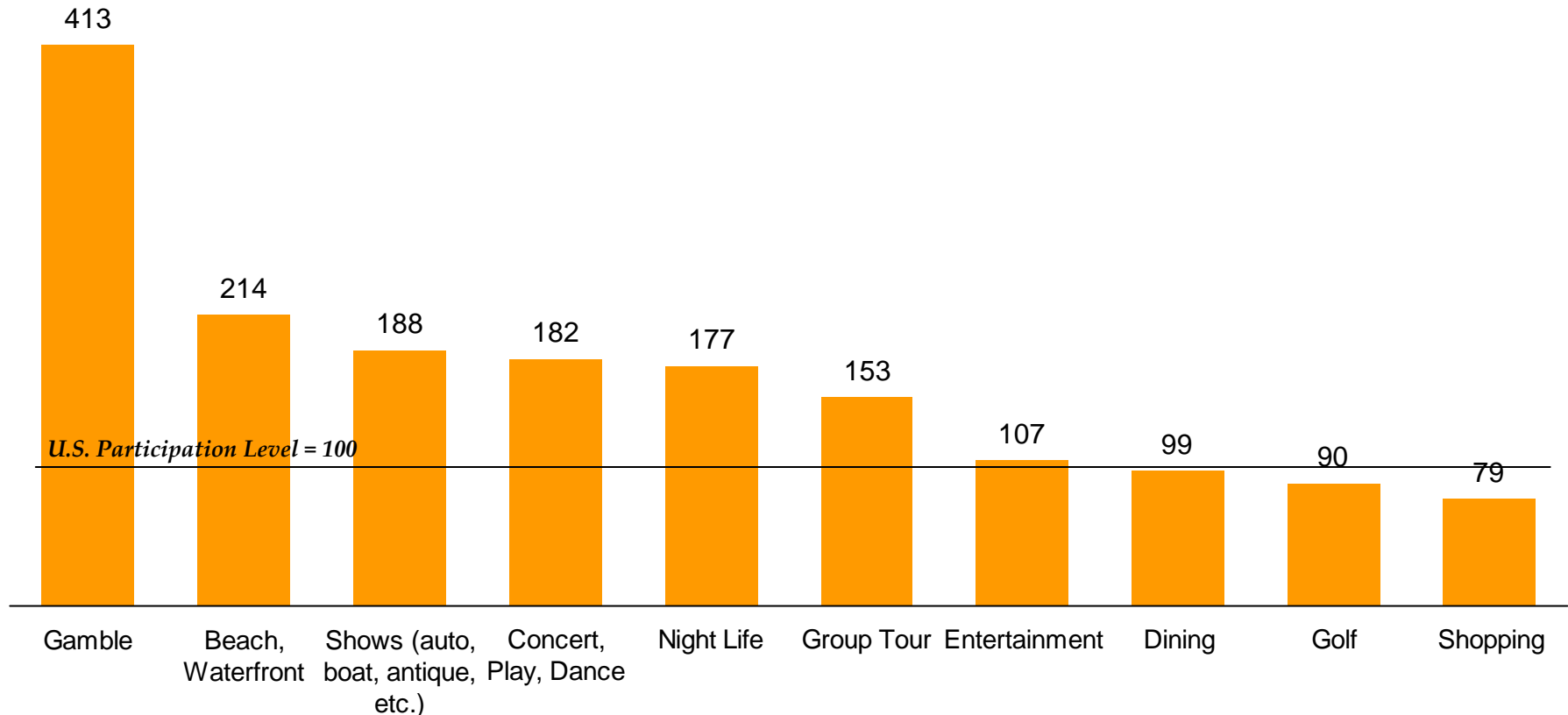


New Jersey Activity Index

(U.S. Participation Level = 100)
(Overnight Leisure Person-Stays in FY2008p)



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.



Top Activities at the Destination (% of Overnight Leisure Person-Stays in FY2008p)



The following two charts show activities in which visitors participated at the destination on the trip. Data are sorted in descending order by New Jersey visitors. Participation rates well above the U.S. averages are highlighted.

	U.S.	New Jersey	Comp Set	NJ w/o Atlantic City
Gamble	8%	31%	4%	4%
Dining*	31%	30%	30%	30%
Entertainment*	23%	25%	21%	18%
Beach, Waterfront	11%	23%	10%	27%
Shopping*	24%	19%	23%	20%
Night Life	8%	14%	8%	9%
Sightseeing	23%	12%	23%	14%
Concert, Play, Dance	5%	10%	6%	8%
Group Tour	4%	6%	4%	5%
Theme Park, Amusement Park	8%	6%	6%	8%

Top Activities at the Destination (cont.) (% of Overnight Leisure Person-Stays in FY2008p)

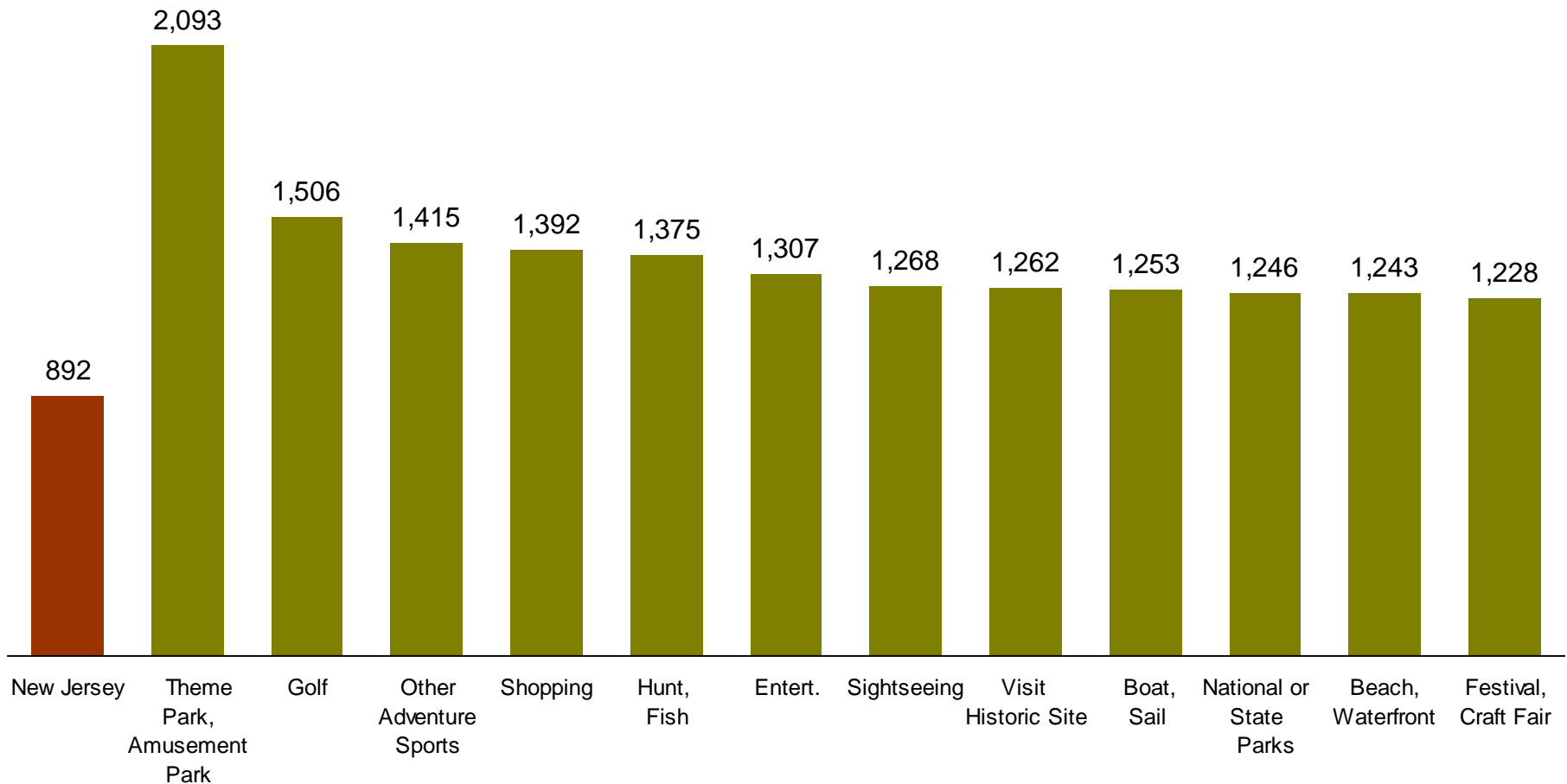


The remaining activities are enjoyed by a small proportion of New Jersey visitors

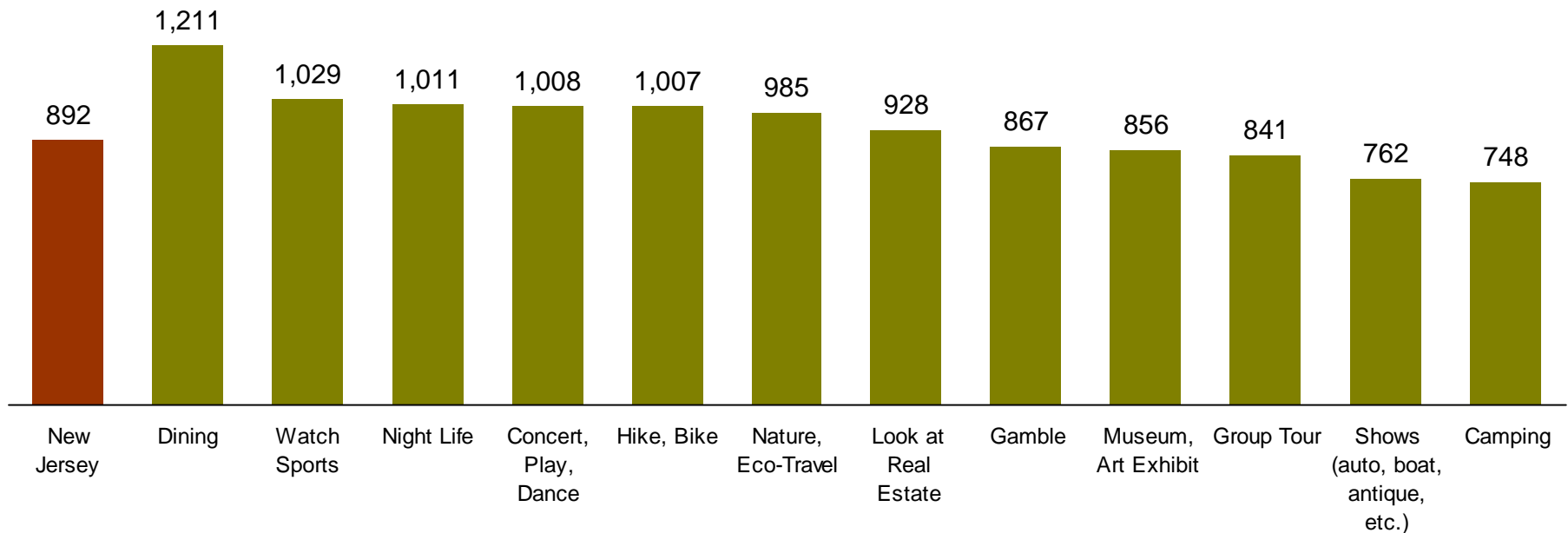
	U.S.	New Jersey	Comp Set	NJ w/o Atlantic City
Visit Historic Site	7%	3%	9%	5%
Hike, Bike	5%	3%	5%	5%
National or State Parks	9%	3%	8%	5%
Camping	6%	3%*	6%	4%
Festival, Craft Fair	4%	3%	4%	4%
Golf	2%	2%*	2%	3%
Hunt, Fish	4%	2%*	3%	3%
Shows (auto, boat, antique, etc.)	1%	2%*	1%	1%
Watch Sports	5%	2%*	5%	2%
Boat, Sail	2%	2%*	2%	2%
Nature, Eco-Travel	4%	1%*	4%	2%
Look at Real Estate	2%	1%*	2%	2%
Museum, Art Exhibit	5%	1%*	6%	1%
Snow Ski	1%	1%*	2%	2%

New Jersey Avg. Party per Trip Spending by Activities

(\$ Overnight Leisure Stays in FY2006-08p)



New Jersey Avg. Party per Trip Spending by Activities (cont.) (\$ Overnight Leisure Stays in FY2006-08p)

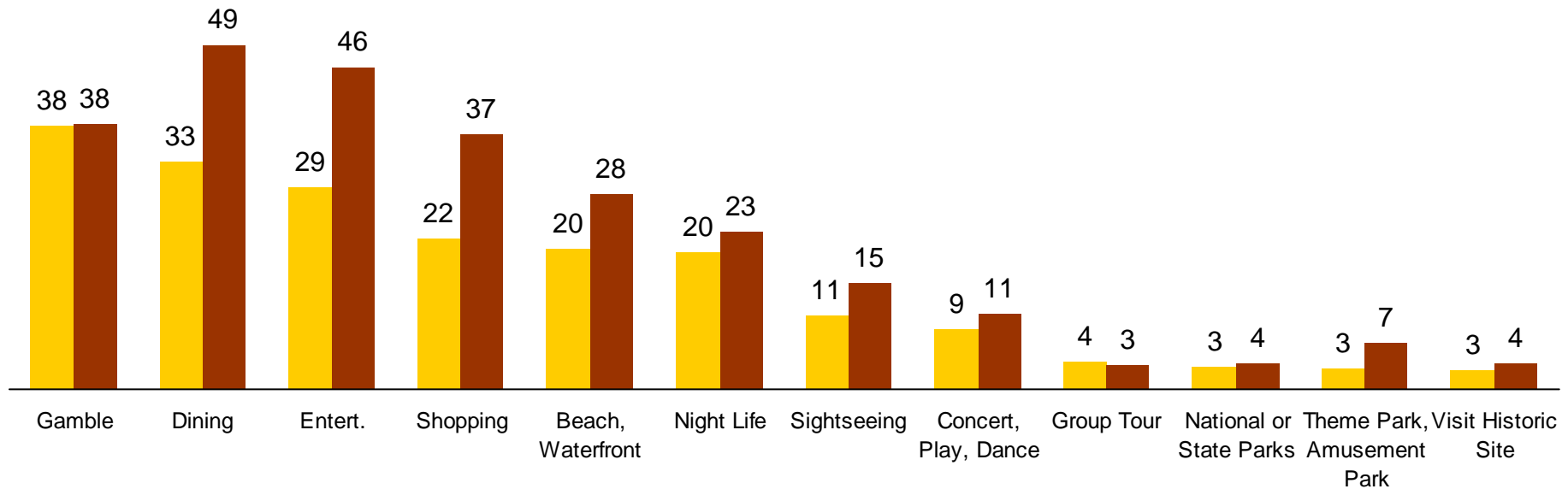


New Jersey Activity Comparison (% of Overnight Leisure in FY2006-08p)



■ Stays Based

■ Trip-Dollars Based



New Jersey Activity Comparison (cont.) (% of Overnight Leisure in FY2006-08p)

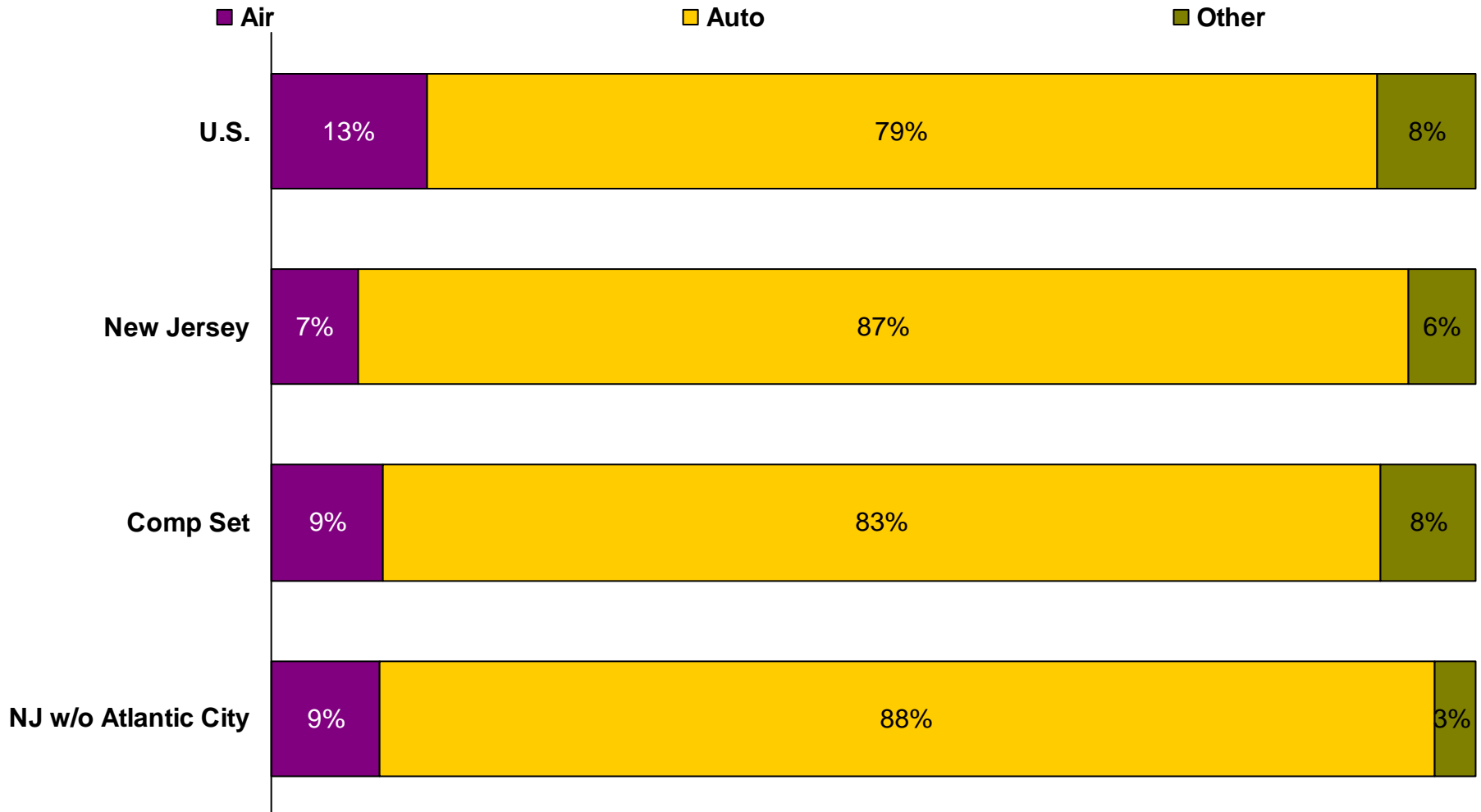


■ Stays Based

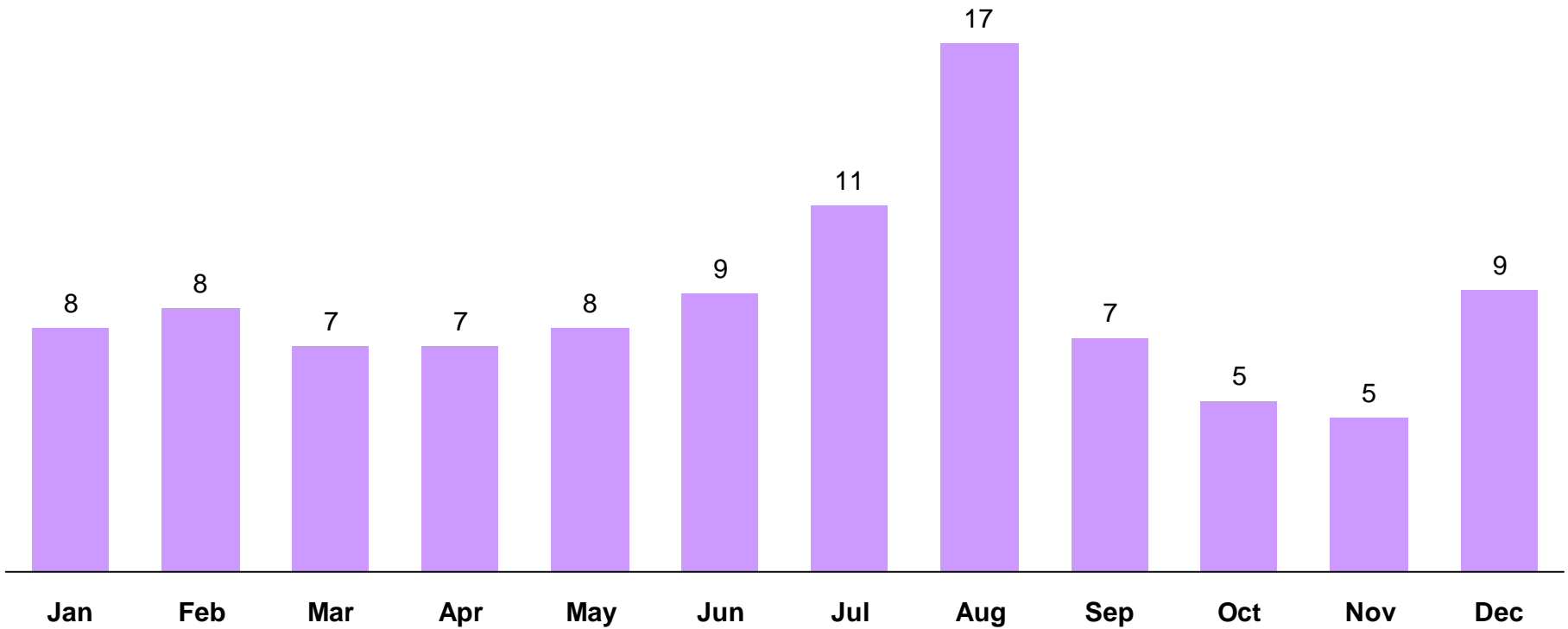
■ Trip-Dollars Based



Main Mode of Transportation: U.S., New Jersey and Competitive Set (% of Overnight Leisure Person-Stays in FY2008p)

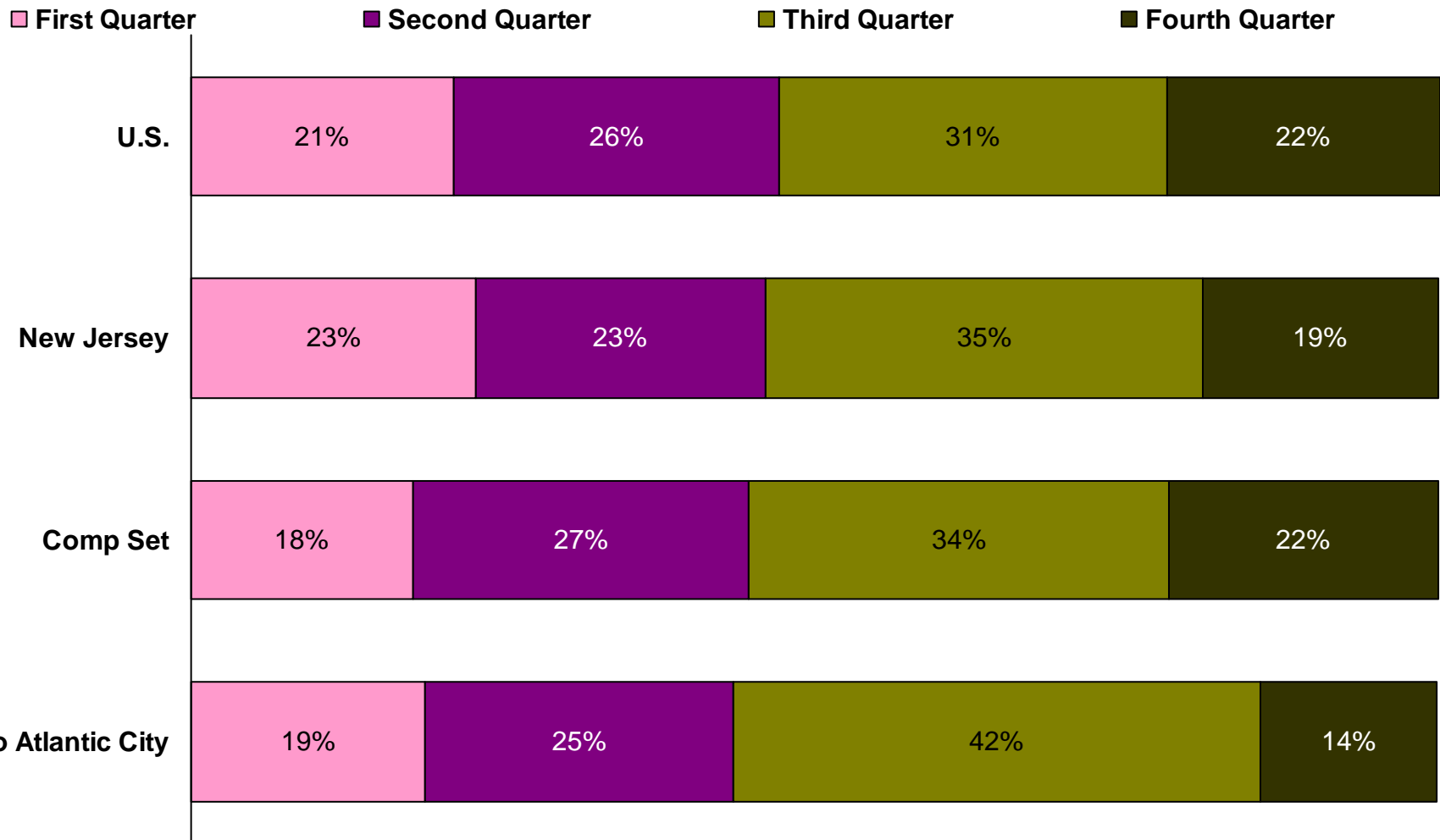


New Jersey Month Trip Started (% of Overnight Leisure Person-Stays in FY2008p)



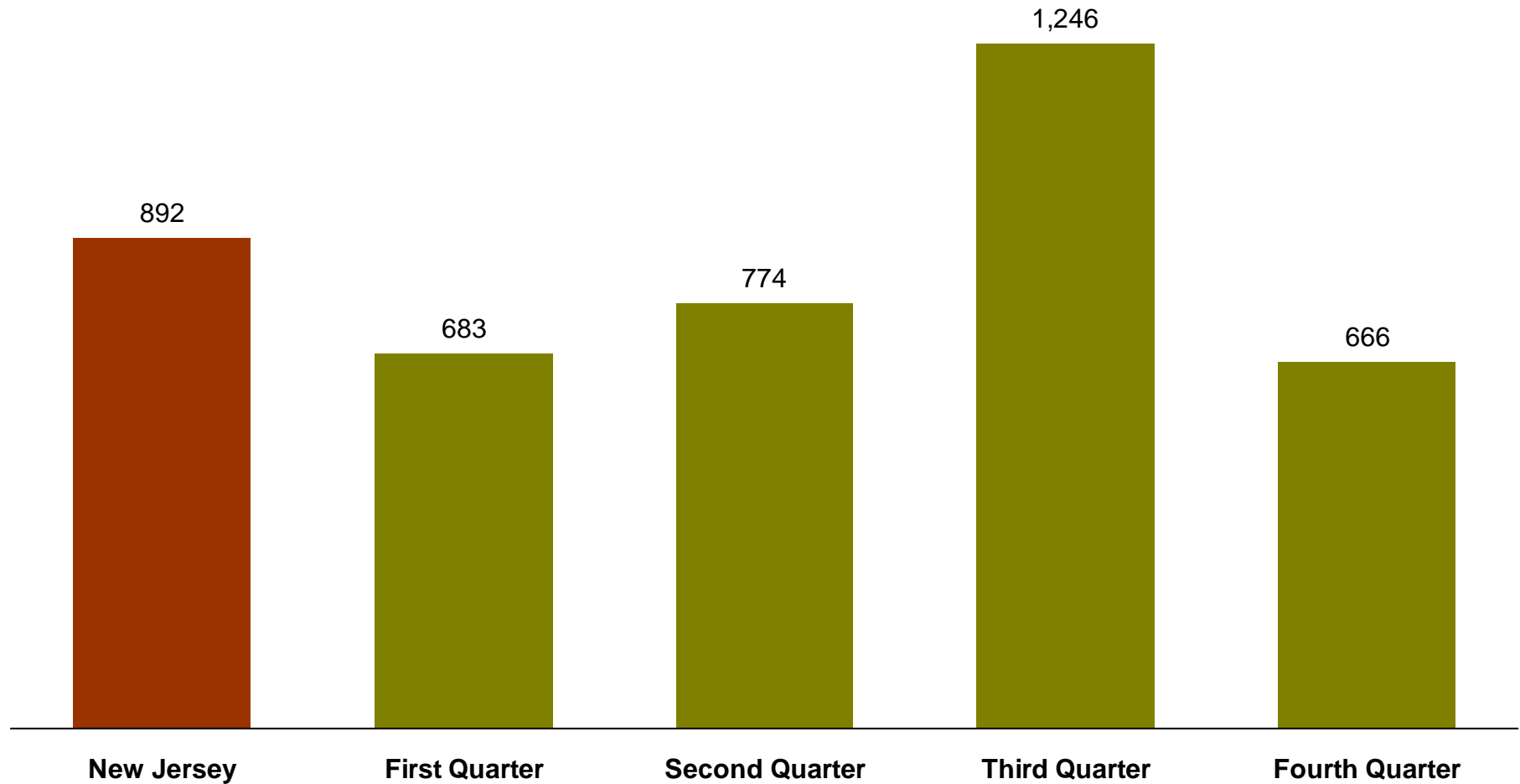
80

Trip Timing by Quarter: U.S., New Jersey and Competitive Set (% of Overnight Leisure Person-Stays in FY2008p)



New Jersey Avg. Party per Trip Spending by Quarter

(\$ Overnight Leisure Stays in FY2006-08p)



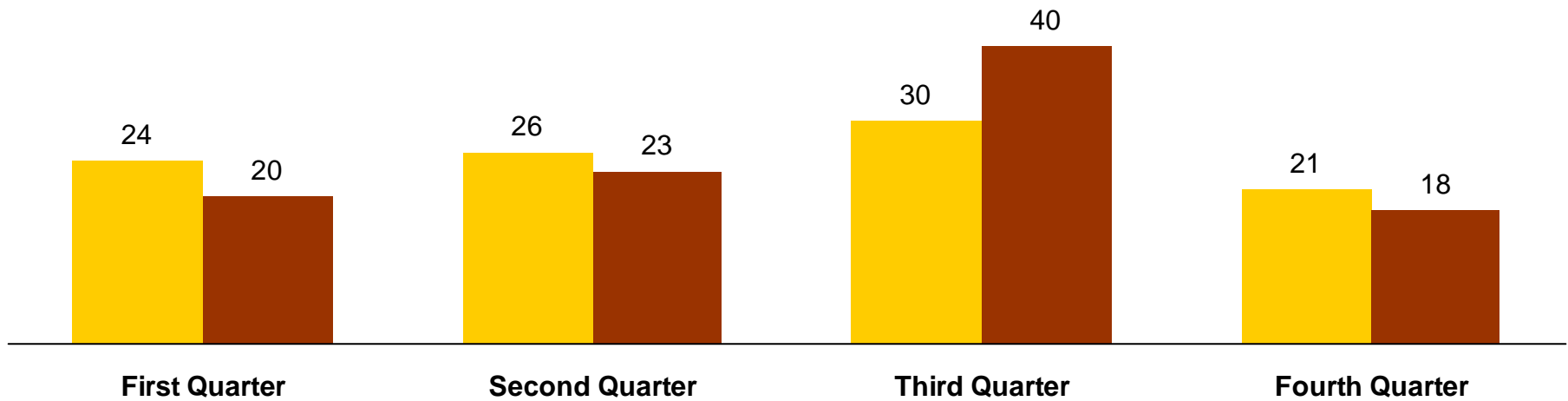
New Jersey Trip Timing Comparison by Quarter

(% of Overnight Leisure in FY2006-08p)

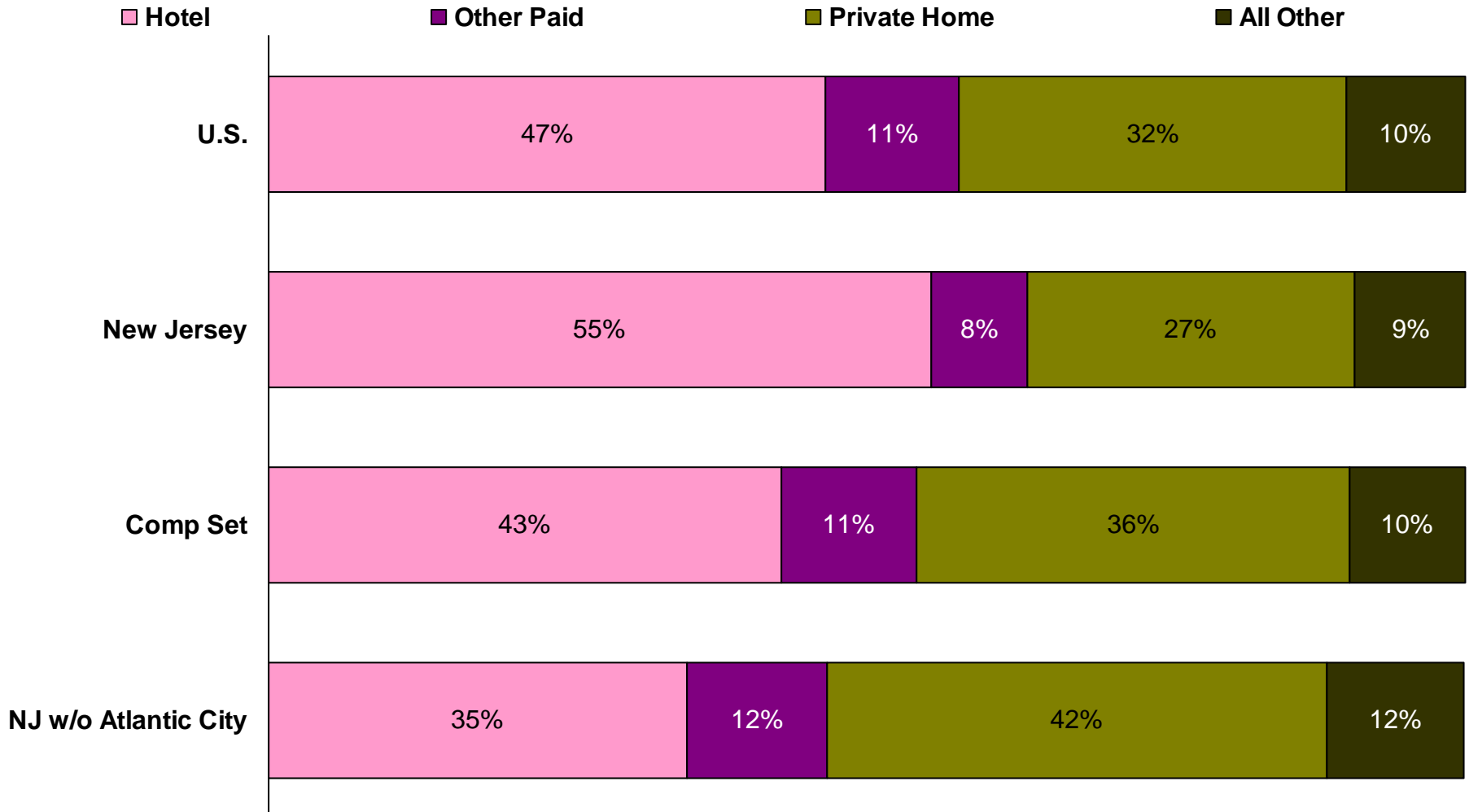


■ Stays Based

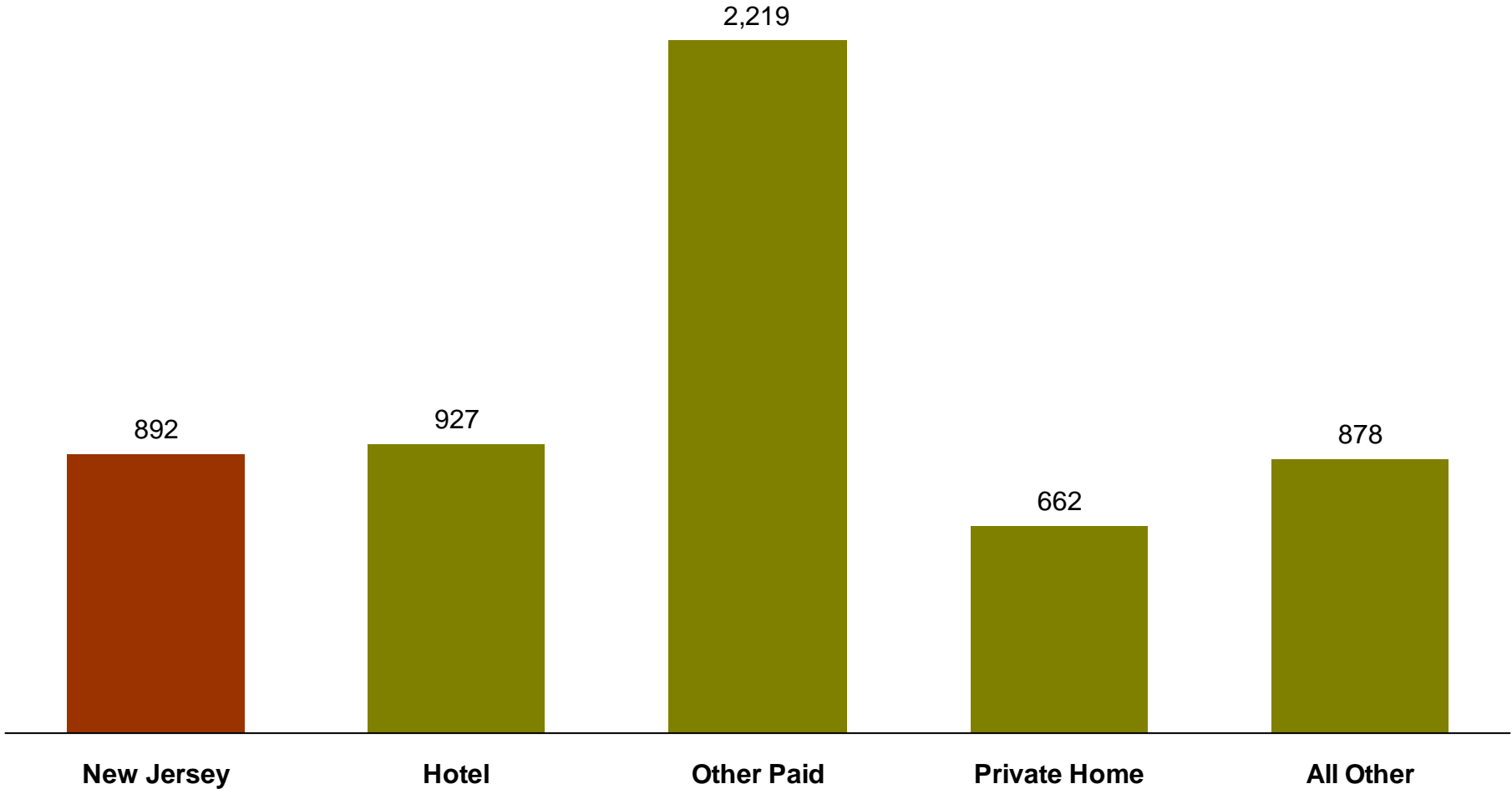
■ Trip-Dollars Based



Accommodation Type: U.S., New Jersey and Competitive Set (% of Overnight Leisure Person-Stays in FY2008p)



New Jersey Avg. Party per Trip Spending by Accommodation Type (\$ Overnight Leisure Stays in FY2006-08p)



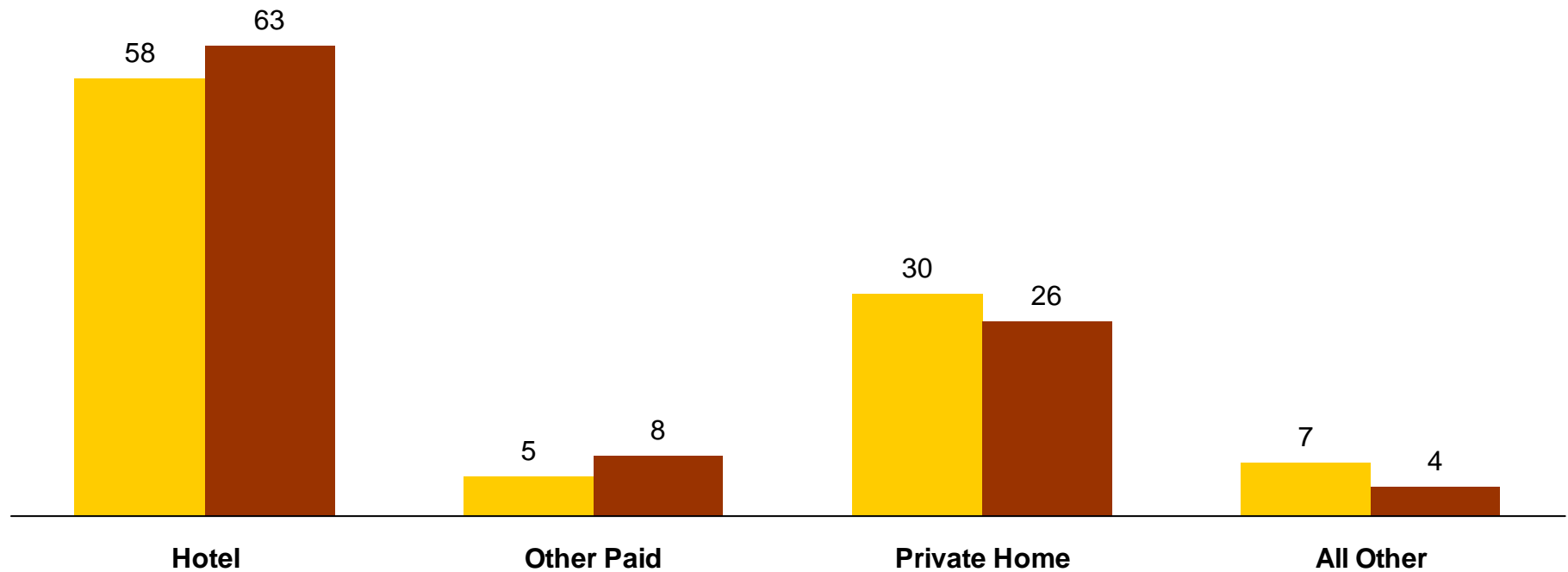
New Jersey Accommodation Type Comparison

(% of Overnight Leisure in FY2006-08p)



■ Stays Based

■ Trip-Dollars Based







Origin Markets

New Jersey Overnight Leisure travel continues to be dominated by **in-state travelers**, reaching a **five year high in FY2008p**.

- Excluding New Jersey, the majority of visitors originated from New York and Pennsylvania
- The top ten origin states accounted for 91% of New Jersey Overnight Leisure visitation
- On a micro level, New York, NY, Philadelphia, PA, Washington DC (Hagerstown, MD), Baltimore, MD, Wilkes Barre-Scranton PA, Boston, MA (Manchester, NH), Harrisburg-Lancaster-Lebanon-York, PA, Pittsburgh, PA, Albany-Schenectady-Troy, NY and Hartford & New Haven, CT were the top feeder markets (DMAs) of the New Jersey Overnight Leisure travel market in FY2006-08p
- Travel parties originating from the top ten feeder markets (DMAs) spent an average of \$929 per trip, slightly more than the New Jersey average of \$892

Travel Distance

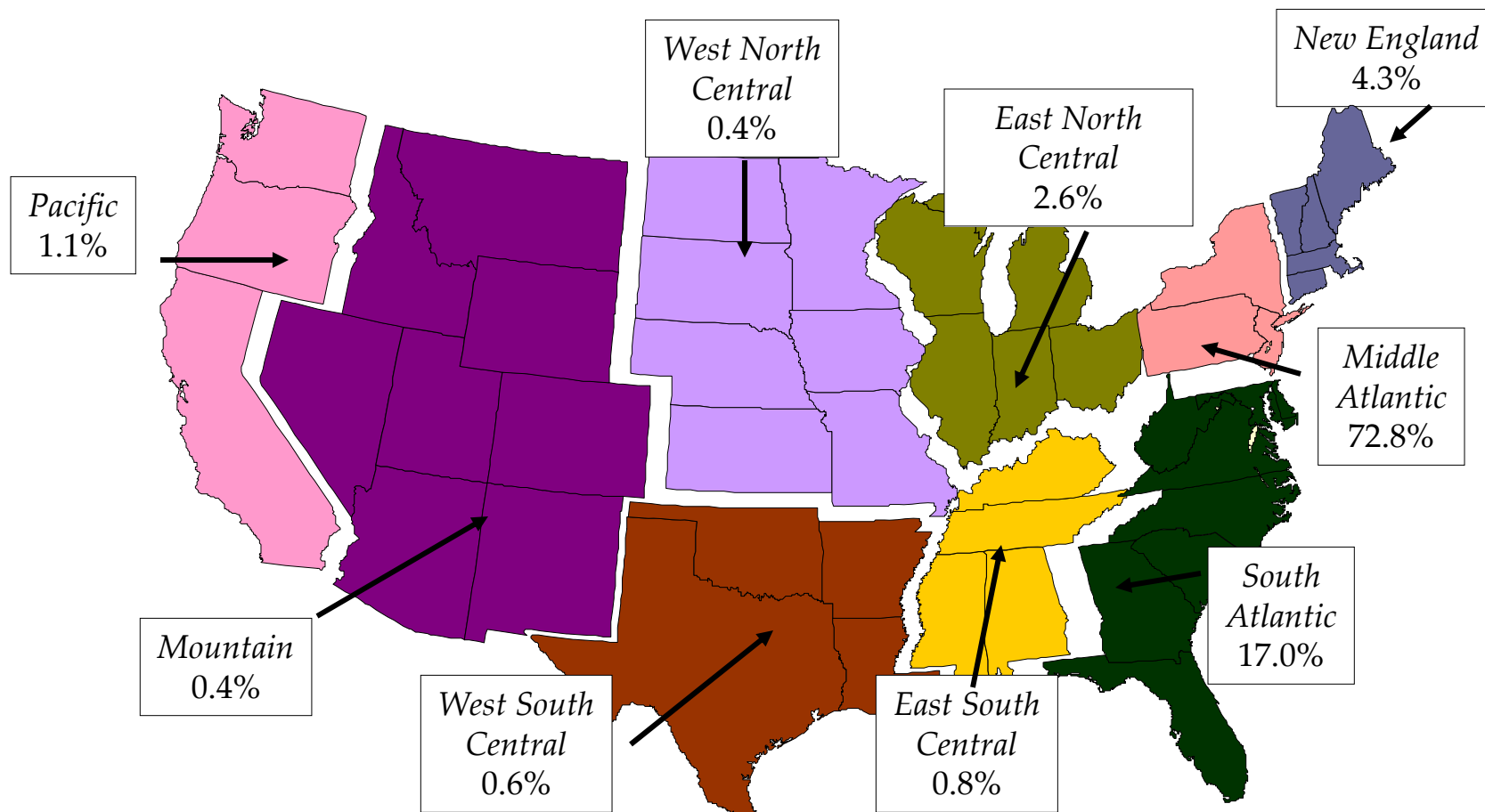
Due to the proximity of its origin markets, New Jersey Overnight Leisure visitors averaged the **shortest one way distance traveled (239 miles)** among the **average U.S. destination (438 miles)** and **Competitive Set (370 miles)**.

- When arriving by auto, eight out of ten visitors drove 200 miles or less each way
- Also true when excluding Atlantic City
- However, visitors traveling by air typically originated from further markets, as six out of ten New Jersey Overnight Leisure visitors travel over 750 miles each way

Top Origin Divisions for Travel to New Jersey (% of Overnight Leisure Person-Stays in FY2008p)



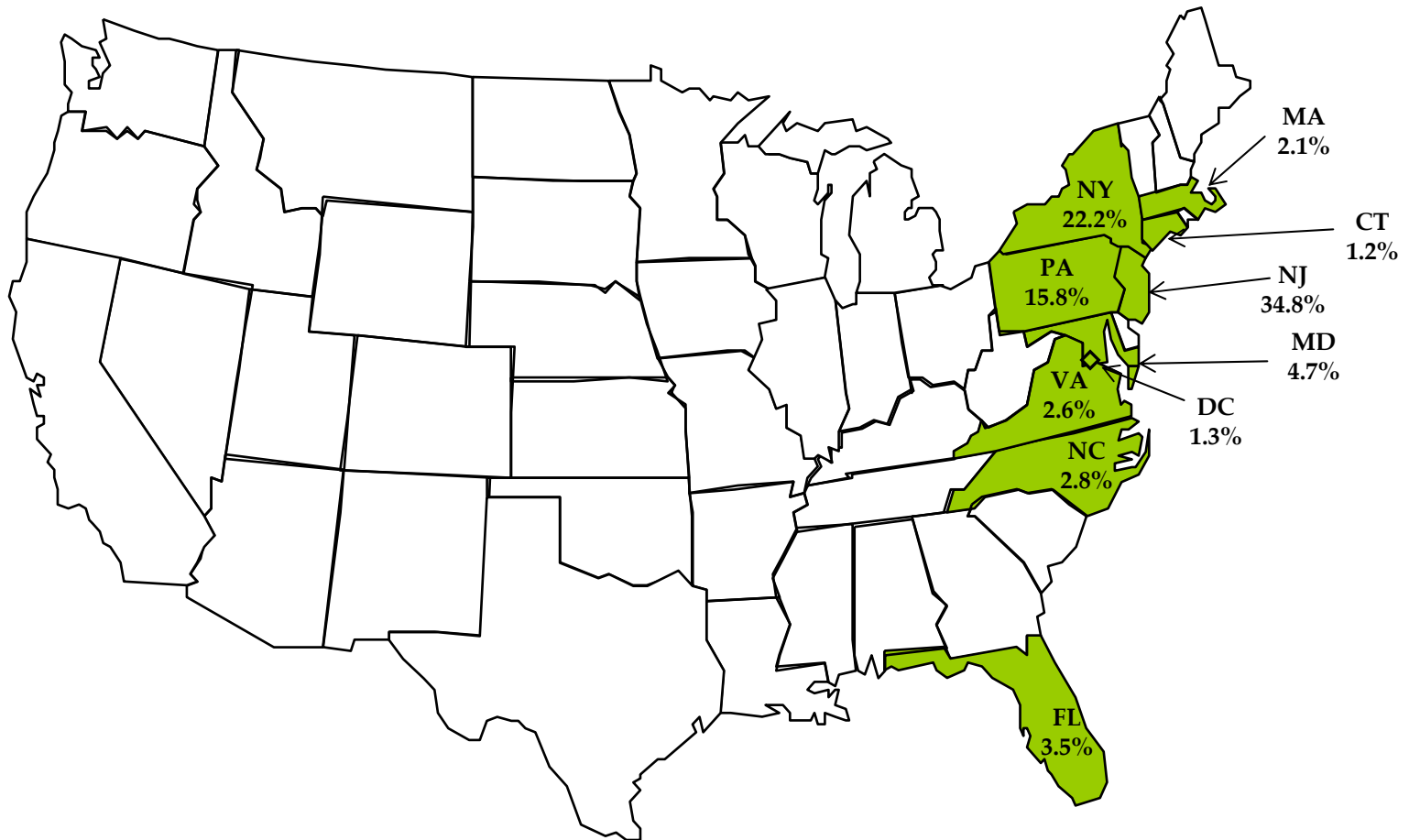
The U.S. Bureau of Census groups states into nine divisions. The majority of New Jersey Overnight Leisure visitors live in the Middle Atlantic division (72.8%), followed by the South Atlantic (17.0%) and New England (4.3%) divisions.



New Jersey Top Origin States (% of Overnight Leisure Person-Stays in FY2008p)



More than one-third of New Jersey Overnight Leisure visitors come from the State itself. The top ten states produce 91.0% of New Jersey visitors.



New Jersey Top Origin DMAs

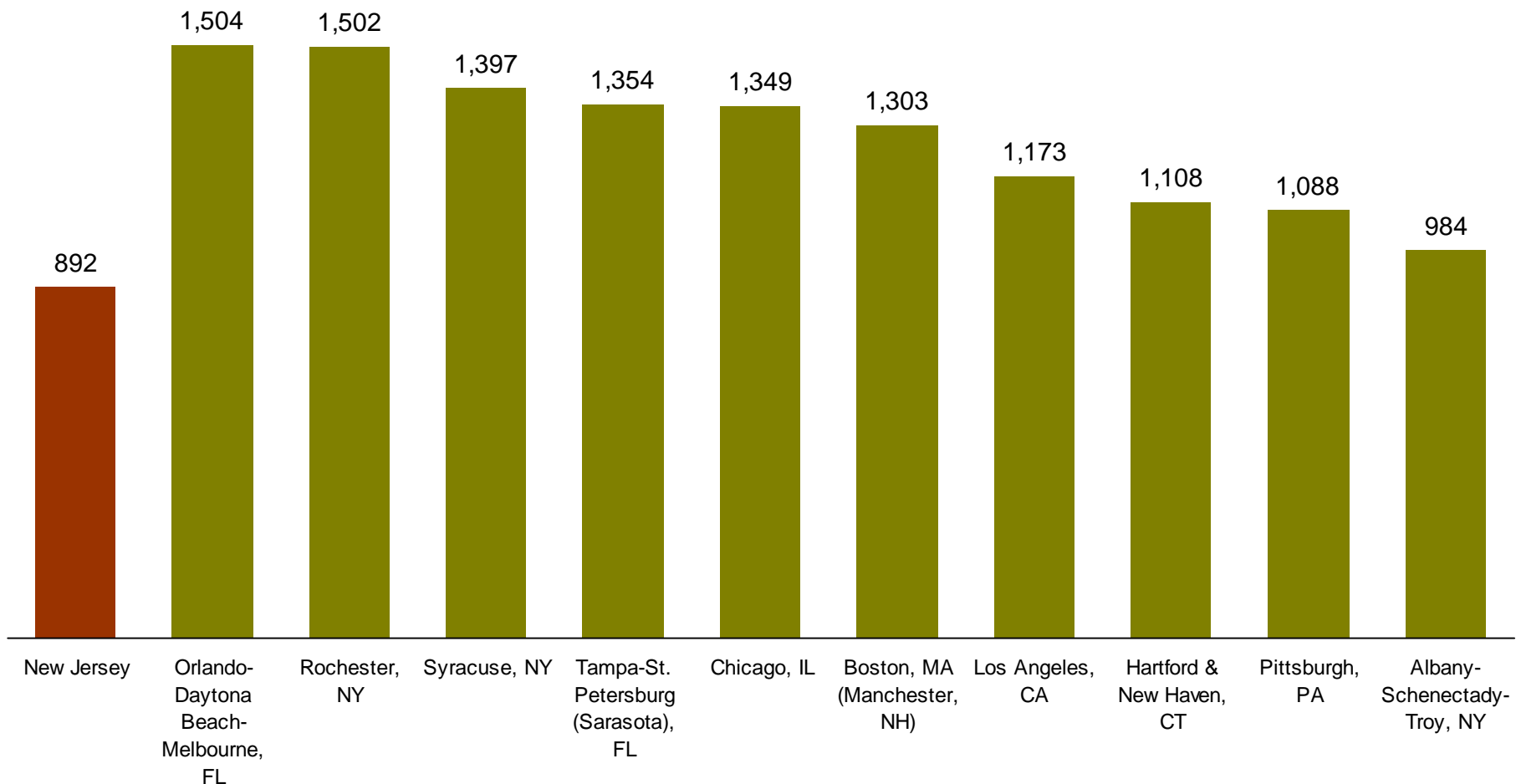
(% of Overnight Leisure Person-Stays in FY2006-08p)



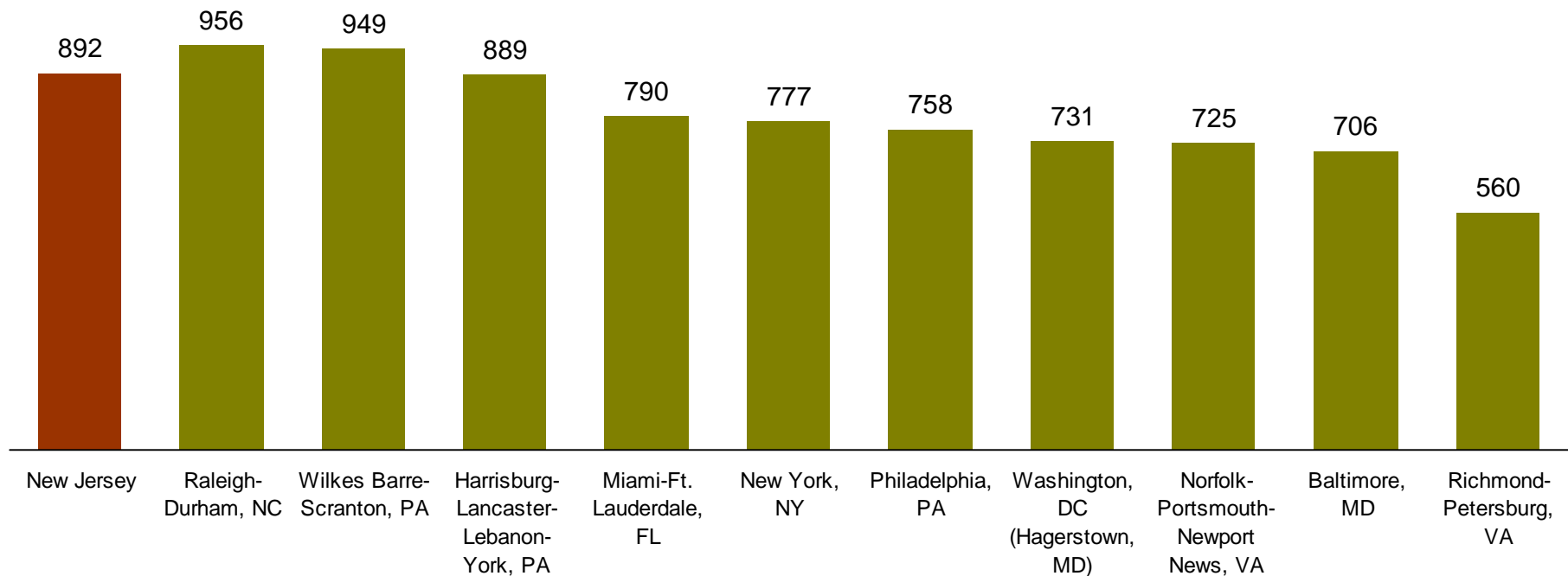
Visitor origin market data has been combined for three years -- FY2006-08p -- to provide better stability or reliability of the findings. The top ten markets account for 83.1% of all New Jersey visitors. Markets are sorted in descending order by New Jersey's top markets.

	U.S.	New Jersey	Comp Set	NJ w/o Atlantic City
New York, NY	5.2%	42.7%	12.4%	35.0%
Philadelphia, PA	2.3%	22.3%	6.2%	23.2%
Washington, DC (Hagerstown, MD)	2.3%	5.7%	7.9%	7.2%
Baltimore, MD	1.0%	2.9%	3.5%	2.5%
Wilkes Barre-Scranton, PA	0.4%	2.4%	1.7%	1.7%
Boston, MA (Manchester, NH)	1.8%	1.8%	2.1%	2.4%
Harrisburg-Lancaster-Lebanon-York, PA	0.6%	1.6%	2.3%	1.6%
Pittsburgh, PA	1.0%	1.3%	3.5%	1.3%
Albany-Schenectady-Troy, NY	0.5%	1.2%	1.6%	1.5%
Hartford & New Haven, CT	0.9%	1.2%	1.3%	1.1%
Top 10 Sum	16.0%	83.1%	42.5%	77.5%

New Jersey Avg. Party per Trip Spending by Origin DMA (\$ Overnight Leisure Stays in FY2006-08p)



New Jersey Avg. Party per Trip Spending by Origin DMA (\$ Overnight Leisure Stays in FY2006-08p)

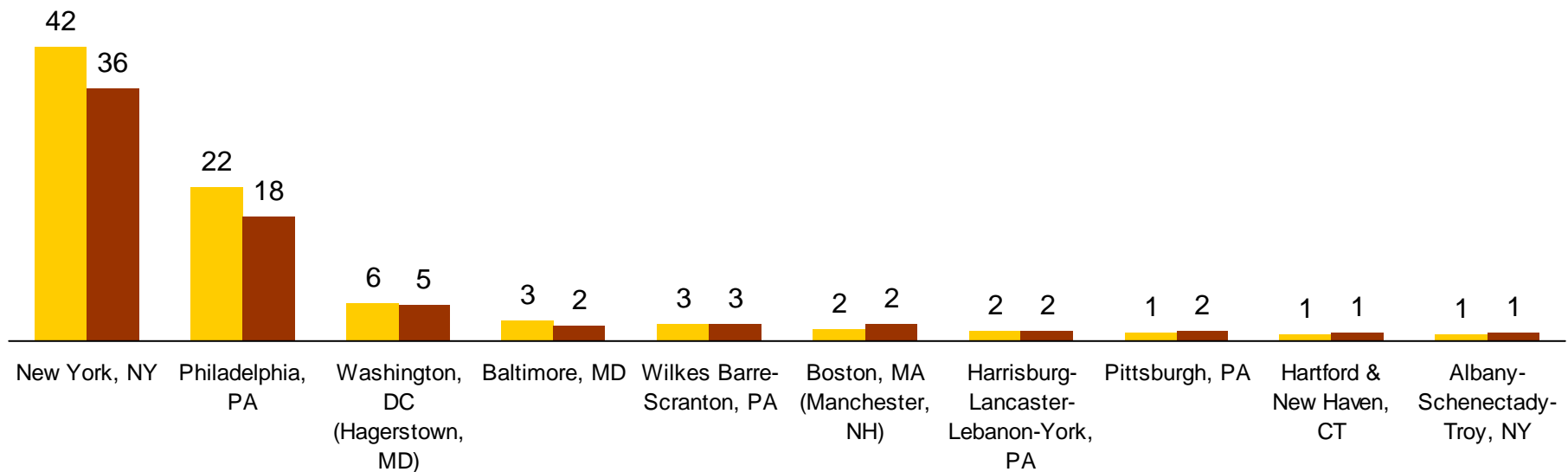


New Jersey Origin DMA Comparison (% of Overnight Leisure in FY2006-08p)

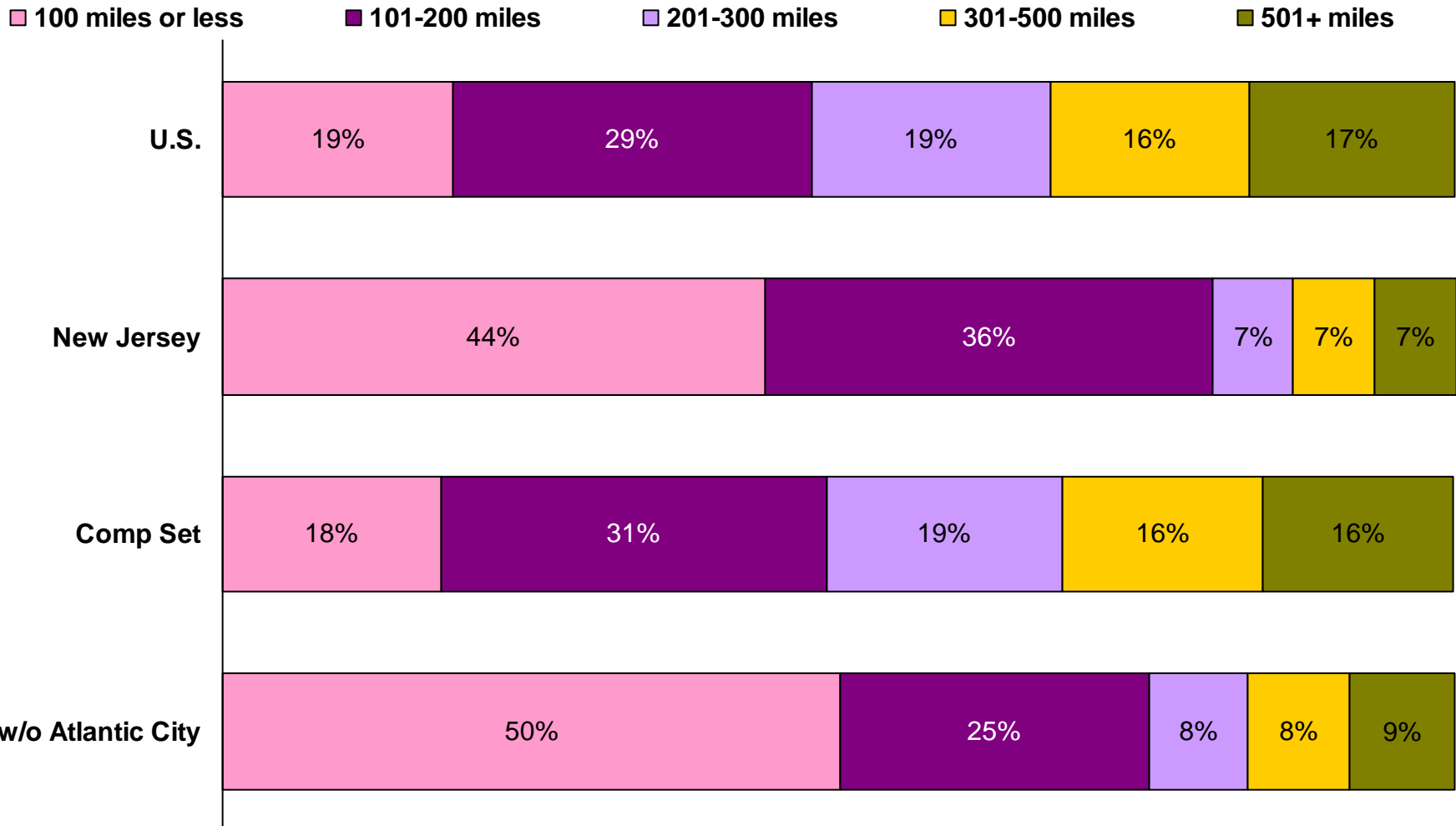


■ Stays Based

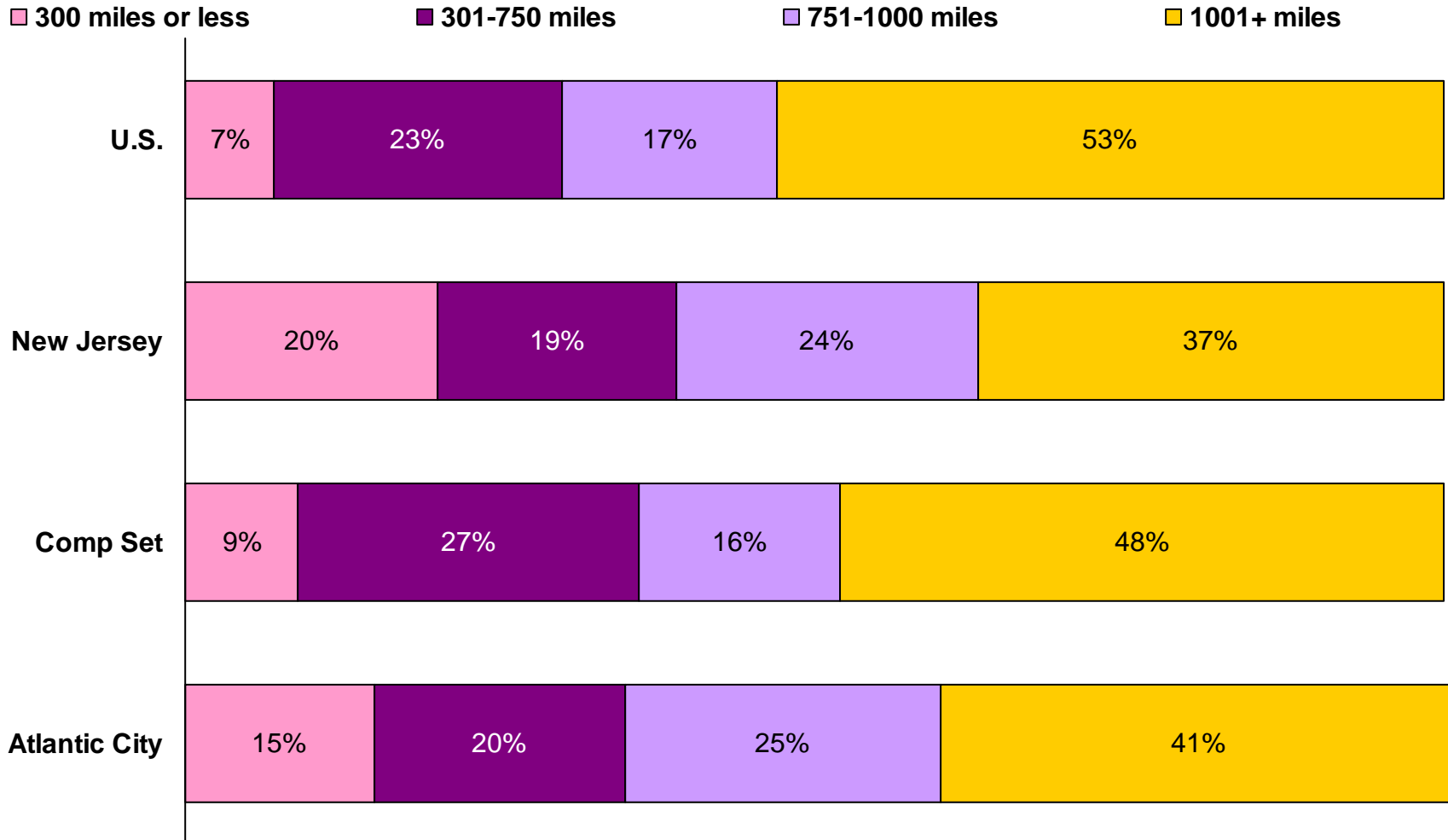
■ Trip-Dollars Based



Travel Distance Distribution By Auto: U.S., New Jersey and Competitive Set (% of Overnight Leisure Person-Stays in FY2008p)



Travel Distance Distribution By Air: U.S., New Jersey and Competitive Set (% of Overnight Leisure Person-Stays in FY2008p)

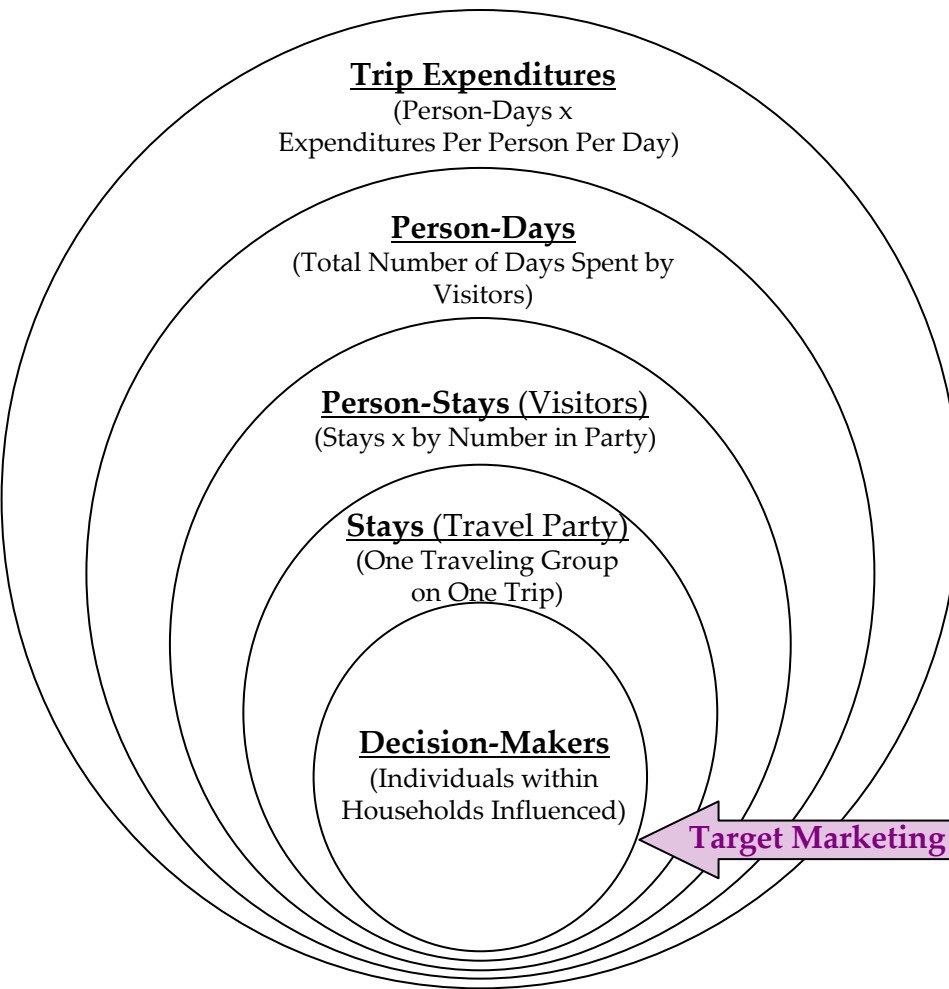




- Founded in 1982, D.K. Shifflet & Associates, Ltd. specializes in syndicated and custom market research in the travel and tourism industry.
 - Syndicated - Monitor U.S. Travel behavior: *PERFORMANCE/Monitor*SM - largest, ongoing travel tracking study in industry
 - Custom - Segmentation and positioning studies to assist clients in strategic marketing efforts
 - Clients - include destinations, theme parks, credit cards, auto clubs, hotels chains among others
- To meet the need for quality information, DKSA conducts the largest, ongoing, monthly survey of U.S. consumers' travel behavior—the *PERFORMANCE/Monitor*SM.
 - Each mailing goes to an average of 45,000 households per month
 - Each survey collects the previous 3 months of travel behavior
 - DKSA uses an overlapping monthly mail sequence which reduces sample bias for maximum accuracy
 - More than 75,000 traveling households respond to the survey each year. This results in more than 154,000 Stays at destinations throughout the U.S.
 - New in 2005 - added an average online mailout of 9,000 per month
- DKSA's methodology provides superior quality control measures:
 - We use the Synovate, Inc (formerly Market Facts, Inc.) household panel—households who have agreed in advance to periodically participate in mail and phone surveys. Extensive information about the household and its members is obtained at the time of household recruitment. Thus, a key advantage of the household panel is knowing to whom surveys are sent and from whom surveys are received. Another key advantage of the panel method is higher response rates to surveys—typically 2 to 3 times higher.
 - The 45,000 average monthly mailings as well as returned questionnaires are balanced to the U.S. population across six demographic variables (age, gender, income, education, number of adults, and state of residence). This rebalancing ensures findings are reflective of the U.S. population and enables findings to be projected to the entire U.S. population.



- Returned questionnaires go through an extensive set of manual (visual) and automatic (computer program) processing checks to improve data quality. Questionnaires containing anomalies are discarded or corrected based on insights developed from more than a decade of processing experience.
- All volume estimates in this report are based on a revised visitor volume methodology. The revisions reflect changes in the national-level model and the incorporation of a small-area estimation model. The national-level revisions were necessary following the dramatic changes to travel behavior following September 11, 2001. The small-area estimation component adds enhanced reliability to quarterly and annual estimates by using other data sources (such as hotel room demand and government transportation statistics) as data “anchors” or “reality checks.” Data reported reflect the influence of the revised volume model and the influence of revised population estimates resulting from the 2000 Census.
- Data tables that show all the detailed data collected in this study are delivered to the client. Responses are shown for the total sample as well as key subgroups. The percentages of some questions may exceed 100% due to the rounding of numbers and/or multiple responses permitted for that particular question.



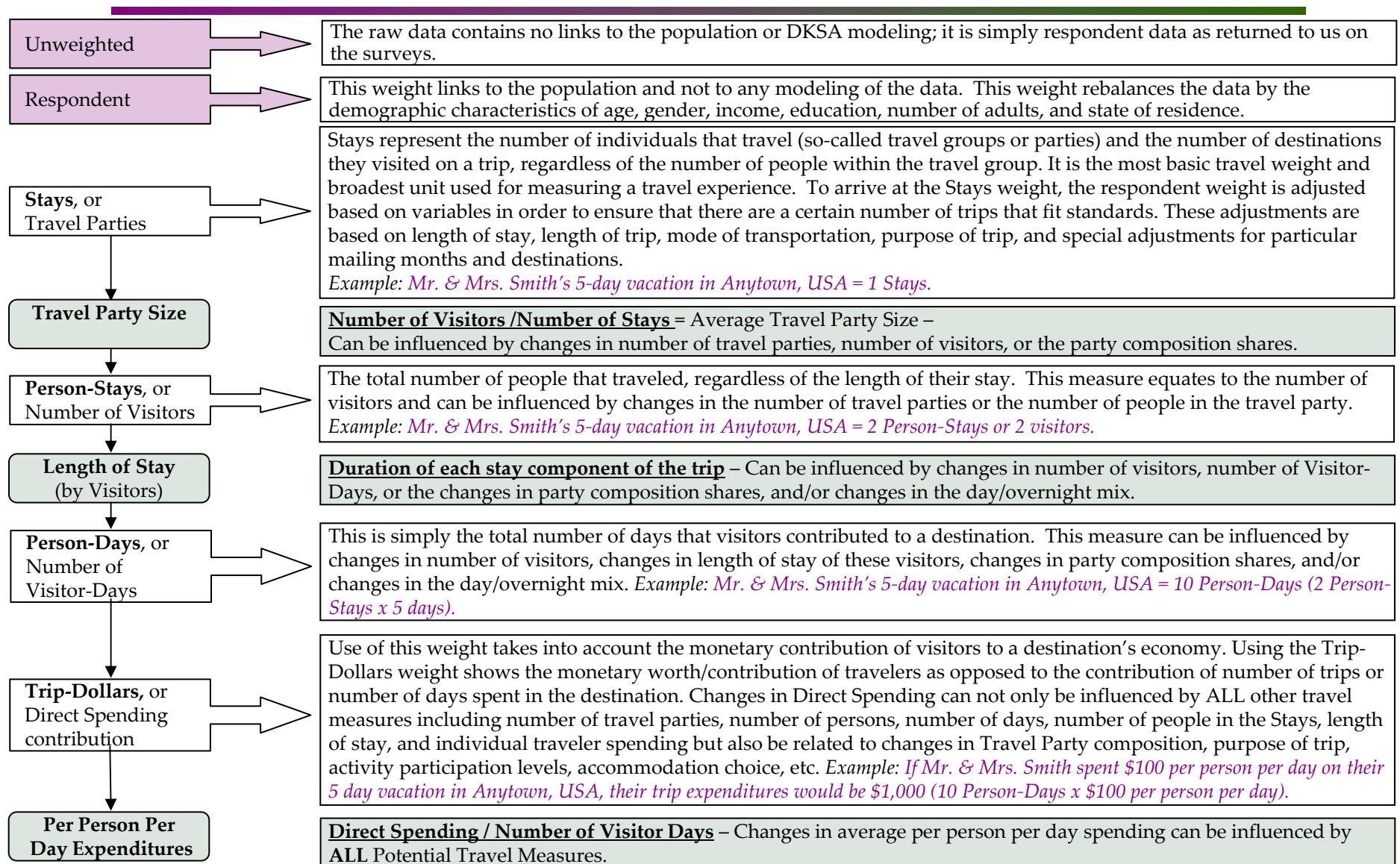
- DKSA can present the results of our ***DIRECTIONS® PERFORMANCE/MonitorSM*** study of U.S. travelers at many levels. Each level of reporting is used for different purposes.
- The largest measure of visitor volume is *Trip Expenditures* and answers the question “How much did they spend”?
- To answer the question of “How many people came and bought your product (destination)?”, the number of people who visited and how long they stayed is reported in *Person-Days*. *Person-Days* is a cumulative measure of total volume of travel generated by travelers, and is therefore an appropriate measure to use when discussing a destination’s volume and relative market share.
- In contrast, the number of *Person-Stays* taken to a destination tells you how many people came to your destination, but not how long they stayed.
- People often travel together with family, friends or with other groups. The number of *Stays* tells you how many distinct groups of travelers came to your destination.
- The smallest unit is the *Decision-Maker*, commonly the target of your marketing efforts.



- It is important to understand the various ways in which to measure a destination's travel market performance. Visitation to a market can be measured in terms of key, interrelated travel measures, such as:
 - Stays
 - Average Travel Party Size
 - Person-Stays
 - Average Length of Stay
 - Person-Days
 - Direct Spending
 - Expenditure Per Person Per Day

Changes in five of these travel measures are caused by changes in other related travel measures. The graphic on the next slide depicts how these travel measure variables are related to each other. When interpreting destination travel data, remember to consider how the travel measures are interrelated to determine drivers of changes in your travel marketplace.

- In most cases, use of weights depends on what you are trying to learn through the data. A weight makes a particular case, or response, more or less important. There are not necessarily any **RIGHT** or **WRONG** weights to use in most cases. However, there are some variables that **MUST** use a specific weight.



General Rules of Thumb when Choosing Weights



When selecting the proper weights to apply to data, the following general rules apply. There are a few important exceptions, which will be described.

- When profiling visitors to a destination, the *Person-Stays* weight is generally preferred for the overall profile because the objective is to understand the travel behaviors and characteristics of the entire population of the destination's visitors.
- When running data to help determine potential travelers (behaviors and characteristics), *Stays* would be the appropriate weight. This is because you profile or describe the individual visitors, but you market via various forms of media to households, not individuals. Households are generally the Travel Party who comprises the "stay" in your destination.
- The variable of Party Size has an impact on every variable except *Stays*.

Note: There is a strong correlation between party size and length of stay! Be careful saying that your visitors are staying longer if you see an increase in the average length of stay. In fact, it may be the case that the visitors were not really staying for longer periods of time but that there was actually an increase in party size or in share of travel parties. Especially families (which have a larger party size) tend to stay for longer periods of time.

	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Age	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Income	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Party Composition	Stays	Trip-Days	Room-Nights	Trip-Dollars
Occupation	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Education	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Length	Person-Stays	Person-Stays	Stays	Trip-Dollars
Transportation	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Accommodations	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Expenditures	Person-Days	Person-Days	Person-Days	Person-Days
Stay Purpose	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Activities	P-Stays or Stays	P-Days or Stays	Stays	Trip-Dollars
Distance	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Seasons	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Ratings	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Origin Markets	Person-Stays	Person-Days	Room-Nights	Trip-Dollars



Party Composition

Party Composition is best run using the Stays weight (if you are running it in conjunction with other data use Person-Stays weight). The reason for this is that party composition already takes into account the “people” on the trip. So, you would not want to weight it using Person-Stays, which also takes into account the number of people, or party size. If you run party composition weighted by Person-Stays, then larger Stays, such as Families, would get heavier weights and smaller Stays such as Couples or Adults Traveling Alone would get lower weights than they should. In a sense, you would be double counting.

Expenditures

Expenditures must always be run using the Person-Days weight. This is due to the way we ask the question in the *PERFORMANCE/Monitor*SM. We ask respondents to indicate how much they spent per person per day.

Length of Stay

Length of Stay should never be run using Person-Days, Person-Stays or Room-Nights weights, and should only be run using the Stays weight. This is because this measure already takes into account the number of days a respondent is spending on the Stay. So, running length of stay using Person-Days would be double counting – giving higher weights to those who stayed longer (more days). Room-Nights also include a length of stay concept. Person-Stays weight contains the element of party size. Using the Person-Stays weight for length of stay may result in a false understanding of change in Length of Stay due to the strong correlation of Length of Stay and Party Size.

Activities

Activities should be run using the Stays or Person-Stays, never Person-Days weight. Running activities in Person-Days makes the assumption that each person on the stay participated in each activity for each day. Running activities in Person-Stays makes the assumption that each person on the stay participated in each activity. Running activities using the Stays weight makes the assumption that at least one person on the stay participated in an activity on at least one day of the stay.



VARIABLES	EXPLANATION
Repeat Visitation	represents the number of visits to the destination in the past three years, including the visit being reported. Provided for cities only.
Children in Household	Sum exceeds 100% due to multiple-children households.
Travel Party Composition	<p>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.</p> <p>MM/FF include either two females or two males from different households traveling together.</p>
Activities	<p>Entertainment } These activities are based on minimum spending levels; Dining } Entertainment (>\$10), Dining (>\$20), Shopping (>\$20). Shopping } All other activity incidence is based on activities selected from a list. Note that the sum of all activity participation exceeds 100% as a function of the survey, whereby up to four activities per stay may be selected.</p>
Average Party per Stay Spending	<p>The destination's total average party per stay spending includes the reported expenditures of all travelers (including transportation expenditure) who spent more than \$1 on their stay at the destination.</p> <p>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.</p>



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. For example, if the air travel finding for the U.S. is 13% and the sample size is 42,182, using the chart below, we can say that at the 90% level of confidence the proportion ranges between 12.8% and 13.2%. Because it reflects a good balance between accepting a difference in findings as real when it in fact is not, and rejecting a difference as not real, when it actually is (in statistical terms, the tradeoff between making a “Type I” and “Type II” error).

	Sample Size for FY2008p	Percentage Finding in Report or Data Tables				
		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%
Overnight Leisure						
U.S.	42,182	0.1%	0.1%	0.2%	0.3%	0.4%
New Jersey	1,445	0.4%	0.8%	1.1%	1.6%	2.2%
Comp Set	7,854	0.2%	0.3%	0.5%	0.7%	0.9%
NJ w/o Atlantic City	884	0.5%	1.0%	1.5%	2.1%	2.8%



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.

For example, if the air travel finding for U.S. is 17% in pervious time period and 15% in current time period, using the chart below, we can say that the actual proportion change is not statistically significant since the resulting Z score (1.52) is smaller than the table Z score (1.64).

Data Input	Sample 1	Sample 2	Resulting Z Score	Z score	Confidence Level
Proportion	17.0%	15.0%		1.96	95%
Sample Size (n)	1600	1500	1.52	1.64	90%



D.K. SHIFFLET & ASSOCIATES, LTD
DIRECTIONS® PERFORMANCE/MONITORSM
SURVEY QUESTIONS (3-17-05)

Sample Contacted Annually: 540,000 Households

45,000 Per Month - Every Month - Year After Year

[unless otherwise identified, each measure generally available by month back to 1992]

1. Age of Respondent [Open End/Actual]
Gender of Respondent ☐ Male ☐ Female
2. List your frequent traveler programs and travel club memberships (name of airlines, hotels, rental cars, auto club: AAA, etc; AARP). (List up to 6) [Open End/Coded]
3. **Last 12 months**, number of nights you stayed in paid lodging (e.g. hotel, condo, ship, campground) for:
Business: Number of Nights [Open End/Actual]
Leisure: Number of Nights [Open End/Actual]
Theme Parks: Number of Times [Open End/Actual] *Added 06/96*
4. **Past 3 months** travel, both business and leisure, how many did you take of:
- 4a. Overnight Trips: A night away from home, local or distant.
Overnight Trips: Number of Times [Open End/Actual] ("0" if none)
- 4b. Day Trips: out of your local area (50+ miles one way).
Day Trips: Number of Times [Open End/Actual] ("0" if none)

If "0" to both questions 4a and 4b, stop here. Otherwise continue with question 5.



5. Answer for all day and overnight trip(s) in the past 3 months. (up to 9 trips)

5a. **TRIP**

Trip Start: Month and Date [Open End/Actual]
 Trip Length: Number of Nights [Open End/Actual] ("0" if day trip)
 Was the trip a group tour? [Y/N]

5b. **Stays COMPOSITION**

Number of Men [Open End/Actual]
 Number of Women [Open End/Actual]
 Number of Kids Age 0-17 [Open End/Actual]
 Number from your Household [Open End/Actual]

5c. **TRANSPORTATION**

Main Mode of Transportation:

1 Airline	6 Van/ SUV/ Small Truck
2 Amtrak	7 Large Truck
3 Car	8 Ship
4 Bus	9 Other
5 Camper/ RV	

Payment Method:

1 Cash/ Check	6 Diners' Club
2 American Express	7 Other Card
3 MasterCard	8 Company Direct Bill
4 Visa	9 Points/ Miles
5 Discover	10 Other/ Free

Reservation Type:

1 No Reservation	5 Airline Co. Website Added 11/02
2 800 Phone #	6 Other Website Added 11/02
3 Corp. Travel Dept.	7 Other
4 Travel Agent	

AIRLINE

If used, name main airline: [Open End/Coded]
 Satisfaction Rating: 1-10 Scale (1=Poor, up to 10=Excellent)
 Value Rating: 1-10 Scale (1= Poor, up to 10 = Excellent)



RENTAL CAR

If rented a Car/Truck, name the company
Satisfaction Rating: 1-10 Scale
Value Rating: 1-10 Scale

[Open End/Actual]
(1=Poor, up to 10=Excellent)
(1=Poor, up to 10=Excellent)

Car Rental Payment Method:

- | | | | |
|---|------------------|----|---------------------|
| 1 | Cash/Check | 6 | Diners' Club |
| 2 | American Express | 7 | Other Card |
| 3 | MasterCard | 8 | Company Direct Bill |
| 4 | Visa | 9 | Points/ Miles |
| 5 | Discover | 10 | Other/ Free |

5d. EXPENDITURES BY CATEGORY ("0" if none for You Only)

Trip Package \$ (Fly/Hotel, Cruise, Group Tour, etc.) [Open End/Actual]
NOT IN PACKAGE

Main Transportation \$	[Open End/Actual]	Added 07/96
Rental Car \$	[Open End/Actual]	Added 07/96
Food/Drink \$	[Open End/Actual]	
Entertainment/Recreation \$	[Open End/Actual]	
All Shopping \$	[Open End/Actual]	
All other <u>except</u> Accommodations	[Open End/Actual]	

6. For all day and overnight trip(s) in the past 3 months, list each city visited.

6a. WHERE and WHEN

City (e.g. Miami): (If out of U.S., write city and country) [Open End/Coded]
State (e.g. FL): [Open End/Coded]

CITY RATINGS

Overall Destination Rating: 1-10 Scale (1=Poor, up to 10=Excellent)
Destination Value Rating: 1-10 Scale (1=Poor, up to 10=Excellent)
Number of visits in the last 3 years: [Open End/Actual] Added 05/96, Changed 03/01

TRIP TIMING

Trip Start: Month and Day [Open End/Actual]
Trip Length: Number of Nights [Open End/Actual] ("0" if day trip)



6b. PURPOSE OF STAY

"Group Meeting"

- Company Business*
- 1 Convention
 - 2 Training/ Seminar
 - 3 Other Group Meeting
 - 4 Client Service, Consulting
 - 5 Inspection, Audit
 - 6 Construction, Repair
 - 7 Sales, Purchasing
 - 8 Government/ Military
 - 9 Other Company Business

"Transient Business"
Changed 03/01

Leisure/Personal

- 10 Getaway Weekend
 - 11 General Vacation
 - 12 Visit Friend/ Relatives
 - 13 Special Event
 - 14 Other Personal
- "Leisure Vacation"
"Leisure Non-Vacation"

Both Leisure and Business?

[Y/N] *Added 03/01*

ACTIVITIES

List primary activities for each visit (list up to 4) and circle activity if it was main reason for the trip:

- 1 Eco-Travel *Added 03/01*
- 2 Parks: National, State, etc.
- 3 Visit Historic Sites
- 4 Museum, Art Exhibit, etc. *Added 03/01*
- 5 Concert, Play, Dance, etc. *Added 03/01*
- 6 Festival, Craft Fair, etc.
- 7 Night Life
- 8 Gamble
- 9 Watch Sports Event
- 10 Hike, Bike, etc.
- 11 Hunt, Fish, etc.
- 12 Snow Ski, Snow Board
- 13 Other Adventure Sports
- 14 Play Golf
- 15 Beach/ Waterfront
- 16 Boat/ Sail
- 17 Show: Boat, Car, Home, etc.
- 18 Theme/ Amusement Park
- 19 Touring/ Sightseeing
- 20 Look at Real Estate *Added 06/03*

6c. OVERNIGHT ACCOMMODATION

ACCOMMODATION STAYED

Name of Hotel/ Motel, Shipline, etc. (use chain/ hotel, and extension names, e.g.

Seasons Inn Express).

[Open End/Coded] *If friend/ relatives' home, use "Friend"*

ACCOMMODATION RATINGS

Overall Satisfaction: 1-10 Scale

(1=Poor, up to 10=Excellent)

Value Rating: 1-10 Scale

(1=Poor, up to 10=Excellent)

Service Rating: 1-10 Scale

(1=Poor, up to 10=Excellent)



How many stayed in your room:
Suite Room?

[Open End/Actual]
[Y/N]

Location of Accommodation:

- | | |
|------------|-------------------|
| 1 Airport | 5 Small Town |
| 2 Downtown | 6 Government Park |
| 3 Suburban | 7 Ship |
| 4 Highway | 8 Other |

Type of Accommodation:

- | | |
|---------------------|---|
| 1 "All Suite" Hotel | 7 Ship/ Cruise |
| 2 Resort Hotel | 8 My 2nd home/ apt/ condo |
| 3 Hotel/ Motel | 9 Home/ apt/ condo (not mine) |
| 4 Timeshare | 10 Corporate Apartment <i>Added 07/04</i> |
| 5 Bed & Breakfast | 11 Other |
| 6 Camping/ RV | |

Reservations for Accommodations:

- | | |
|----------------------|--|
| 1 No Reservation | 5 Travel Agent |
| 2 Chain 800 phone # | 6 Hotel Chain Website <i>Added 11/02</i> |
| 3 Direct to location | 7 Other Website <i>Added 11/02</i> |
| 4 Corp. Travel Dept. | 8 Other |

How Paid for Accommodations:

- | | |
|------------------------|------------|
| 1 Self/Friend/Relative | 4 Per Diem |
| 2 Expense Account | 5 Free |
| 3 Company Direct Bill | |

Payment for Accommodations:

- | | |
|--------------------|-----------------------|
| 1 Cash/ Check | 6 Diner's Club |
| 2 American Express | 7 Other Card |
| 3 MasterCard | 8 Company Direct Bill |
| 4 Visa | 9 Points/ Miles |
| 5 Discover | 10 Other/ Free |

ACCOMMODATION EXPENDITURE

Dollars Per Night (Room Only)
Total Hotel/ Lodging Bill
Special Deal?
If in area again, will stay here?

[Open End/Actual]
[Open End/Actual]
[Y/N]
[Y/N] *Added 11/03*



DEMOGRAPHICS

Number of Persons in Household:

[Actual]

Annual Household Income:

- | | | | |
|----|-------------------|----|---------------------|
| 1 | Less than \$5,000 | 15 | \$40,000-\$44,999 |
| 2 | \$5,000-\$7,500 | 16 | \$45,000-\$49,999 |
| 3 | \$7,500-\$9,999 | 17 | \$50,000-\$59,999 |
| 4 | \$10,000-\$12,499 | 18 | \$60,000-\$74,999 |
| 5 | \$12,500-\$14,999 | 19 | \$75,000-\$84,999 |
| 6 | \$15,000-\$17,499 | 20 | \$85,000-\$99,999 |
| 7 | \$17,500-\$19,999 | 21 | \$100,000-\$124,999 |
| 8 | \$20,000-\$22,499 | 22 | \$125,000-\$149,999 |
| 9 | \$22,500-\$24,999 | 23 | \$150,000-\$174,999 |
| 10 | \$25,000-\$27,499 | 24 | \$175,000-\$199,999 |
| 11 | \$27,500-\$29,999 | 25 | \$200,000-\$249,999 |
| 12 | \$30,000-\$32,499 | 26 | \$250,000-\$299,999 |
| 13 | \$32,500-\$34,999 | 27 | \$300,000 |
| 14 | \$35,000-\$39,999 | | |

Occupation of Adult Heads of Household:

- | | | | |
|---|----------------------------|---|-------------------|
| 1 | Managerial/Professional | 6 | Operator, Laborer |
| 2 | Technical, Sales, Admin. | 7 | Student, Other |
| 3 | Service | 8 | Retired |
| 4 | Farming, Forestry, Fishing | 9 | Not Employed |
| 5 | Craftsman, Repairman | | |

Education of Adult Heads of Household: *Changed 10/02*

- | | | | |
|---|------------------------|---|-----------------------|
| 1 | Attended Grade School | 5 | Attended College |
| 2 | Graduated Grade School | 6 | Graduated College |
| 3 | Attended High School | 7 | College Post Graduate |
| 4 | Graduated High School | | |

Marital Status of Head of Household: 1 Married

2 Never Married

3 Divorced/ Widowed/ Separated

Children in Household (Age and Gender):

[Actual]

Location of Household:

State, DMA, ZIP Code, MSA, County

PRIZM coded respondents to block level address

All can be linked to Claritas PRIZM/Clusters and other databases

Available to clients as special purchase.