



D.K. Shifflet & Associates Ltd.

Excellence in Travel Intelligence®

2010 NEW JERSEY OVERNIGHT LEISURE VISITOR PROFILE

Editorial

Travel Year 2010 in Review

Charts & Graphs

Fiscal Year 2010 Visitor Profile

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

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This New Jersey **Overnight Leisure Visitor Profile** provides intelligence on U.S. and New Jersey travel trends from Fiscal Year 2010, defined as the fourth quarter of 2009 through the third quarter of 2010. Information is also provided for five competitive states which draw visitors from the same origin markets as New Jersey. These include New York, Pennsylvania, Maryland, Virginia and North Carolina.

Atlantic City is an iconic destination within the State of New Jersey that typically attracts approximately one-third of all visitors to the State. Although the state should be considered as a whole, Atlantic City's unique

*In 2010 New Jersey hosted
68 Million visitors spending....
\$13 Billion dollars*

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

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 2010 New Jersey Overnight Leisure Visitor Profile is based on a sample of 880 traveling households.

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Executive Summary

This report, like previous reports, compares New Jersey to the competitive states of New York, Pennsylvania, Maryland, Virginia and North Carolina. Data are also analyzed for two New Jersey geographies — primarily, the State as a whole and secondarily as the State excluding Atlantic City.

The economic climate over the past few years has created challenges for most states resulting in decreased travel and thus spending in their cities and destinations. In 2010, however, the trend seems to be changing. After three years of plummeting declines, the average U.S. destination is experiencing positive growth in visitation. New Jersey is no exception, experiencing

growth very similar to the average U.S. destination. However, this growth was not enough to keep New Jersey from losing some its U.S. market share, while all its competitive states, excluding Pennsylvania, gained share of the U.S. overnight leisure market.

Spending by New Jersey visitors has not kept pace with the average destination, but its rate of decline has slowed. The primary reason for the lag in spending appears to be a shift in the regions that are being visited within the State.

Prior to 2007, the Greater Atlantic City region boasted an over 55% share of New Jersey's travel. This share has been redistributed to other regions of the State and now stands at 37%.

Fiscal Year 2010 Highlights:

- Overall visitation returns and the decline in visitor spending slows
- Overnight Leisure visitor volumes remain solid
- Most visitor gains are in regions other than Atlantic City
- Greater Atlantic City region still receives State's largest share of Overnight Leisure Visitors — share continues decline
- Gambling participation continues to decline
- New Jersey and Pennsylvania only states in competitive set losing Overnight Leisure Market Share — all others gain
- New Jersey and all competitive states, excluding Pennsylvania, received Excellent Destination Satisfaction ratings
- Compared to its competition, New Jersey visitors are older with higher incomes and no children in the household
- New Jersey visitors travel more than 200 miles less than those to the average destination

STUDY SPECIFICATIONS

Travel definition: An overnight trip or any day-trip greater than 50 miles one-way from home.

Sample Frame: All U.S. domestic Overnight Leisure travelers during 2010 in New Jersey.

Timeframe: Fiscal Year 2010 (Q4 2009 – Q3 2010)

Executive Summary

The characteristics of those visiting New Jersey may help explain why some of these shifts are occurring. The average overnight visitor to the State arrives by car and travels an average one-way distance of just 300 miles, which is 100 miles less than those traveling to the average U.S. destination or to New Jersey's competitors. In the last couple of years overnight leisure visitors have been slightly younger and have slightly lower incomes than in the past. In addition, the percentage of those having children in their household is on an upward trend.

The types of activities visitors engage in while visiting New Jersey are also changing. Up until 2008, gambling, a very lucrative activity for the State, was the number one activity among New Jersey overnight leisure visitors. By 2010, gambling dropped to number four behind dining, entertainment and beach/waterfront activities. Again reflecting the shift in the types of destinations visited.

In conjunction with the changing face of the New Jersey visitor came changes in the levels of satisfaction and value ratings. Excellent satisfaction and value ratings by overnight leisure visitors to New Jersey have increased substantially between 2008 and 2010. So much so that the average ratings for satisfaction are now considered excellent. Among New Jersey's competitive set, only Pennsylvania has earned less than excellent satisfaction ratings.

In summary, it seems New Jersey has two fairly distinct identities. The Greater Atlantic City region, as a single geography, continues to host the largest share of visitors to the State. This region offers very lucrative activities such as gambling, entertainment and fine dining. Visitors to this region tend to be older and wealthier, and thus generate the largest share of visitor spending in the State. However, they are dwindling either through attrition or interests in other destinations.

The balance of the regions, most of which are waterfront regions, offer more outdoor and nature-type activities which tend to be less profitable than those available in the Greater Atlantic City region. These visitors tend to be younger with lower incomes and children in their households. Combined these regions make up over 60% of visitors to the State.

Having such diverse offerings gives New Jersey a distinct advantage over other destinations in that it can offer something for everyone. And because New Jersey is overwhelmingly a drive destination, it is perfect for shorter, more frequent trips, which, while generally less lucrative, are more affordable, particularly in tough times when people still want to travel even if they can only afford a quick trip.

Visitor Volume and Spending

In Fiscal Year 2010 New Jersey hosted almost 68 million visitors, spending approximately \$12.8 billion while visiting the State.

After two years of declining visitation and spending that began in 2008 and increased in severity in 2009, 2010 brought some relief, at least in terms of visitation to the State. And, although visitor spending is still declining, the rate has slowed.

Continued declines in business, particularly overnight, are hampering further recovery in both visitation and spending.

New Jersey's 2010 increase in total visitation is slightly greater than the U.S. average. However, the average U.S. destination is also showing increased spending levels while New Jersey still shows declines for both total and overnight Leisure spending.

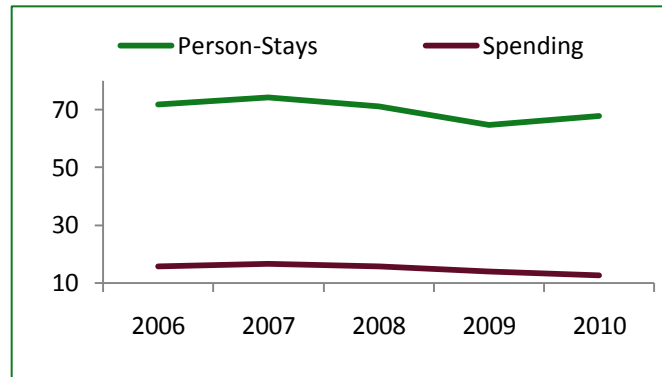
Despite the declines in overall visitation experienced in 2008 and 2009, the number who visit for overnight leisure has remained fairly constant hovering around 30 million visitors. The rate of decline in overnight leisure spending seems to be slowing at a greater pace than among any other cohort.

There are a couple of explanations for why spending continued to decrease while visitation increased in 2010.

First, business travel, particularly overnight business continues to decline in New Jersey, which is having an impact on the growth in total travel. The only reason it is not having a larger impact is that

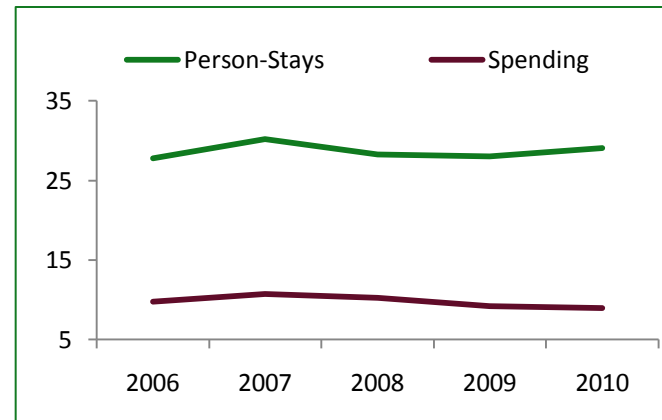
Total

PERSON-STAYS (millions) / DOLLARS (billions)



Overnight Leisure

PERSON-STAYS (millions) / DOLLARS (billions)



68 Million Visitors — ↑ 4.6%

\$13 Billion Dollars — ↓ 8.9%

GLOSSARY

Stays: the number of destinations visited on a trip by a unique group of travelers, regardless of the number of people within the travel group

Person-Stays: the total number of people who visited your destination, regardless of how long they stayed

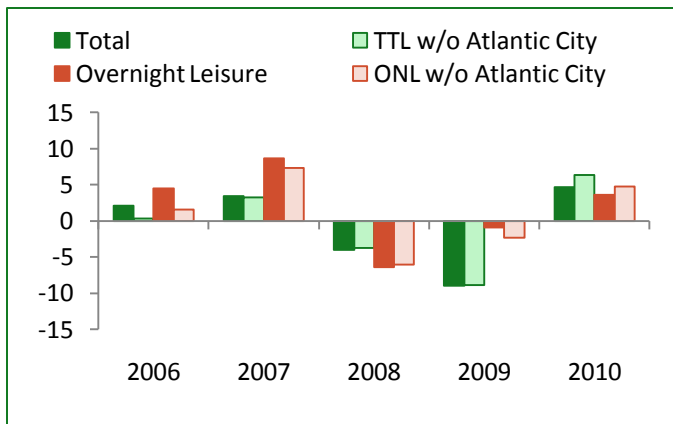
Visitor Volume and Spending

business accounts for only about 14% of all travel and spending to the State. Business spending, even though it accounts for a small percentage of total spending, is declining at twice the rate of visitation. This means that those who come for business are spending much less than they had previously.

Another factor is a shift in visitation away from the Atlantic City region and toward other regions of the State. The charts on this page show the year over year percent change for New Jersey in total and for the State if Atlantic City is excluded from the Analysis.

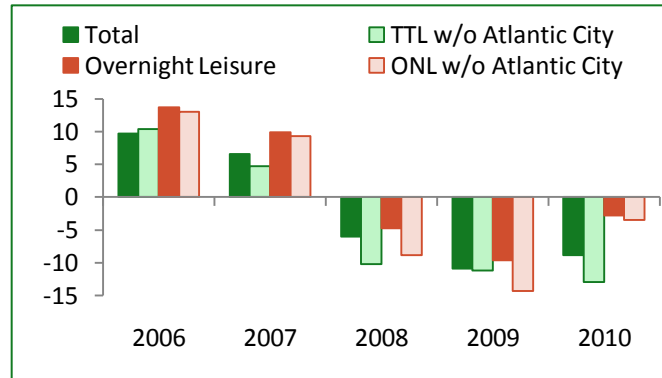
Visitor Volume

PERSON-STAYS (% change)



Visitor Spending

SPENDING (% change)



Historically changes in visitation, particularly positive changes have been of a greater magnitude for the State as a whole than for the State without Atlantic City. Changes in spending, however have been more mixed. Positive changes were more positive for the State as a whole and negative changes were even more negative when Atlantic City was excluded from the Analysis. This is largely due to demographic and behavioral differences between people visiting Atlantic City and those visiting other parts of the State. These differences will be discussed later in this report.

These trends started to change in 2009 and have continued into 2010. Those visiting other parts of the State represent just over two-thirds of all Person-Stays to New Jersey, thus their impact is significant.

Overnight Leisure Visitors
coming back — ↑ 3.6%

Overnight Leisure Spending
slow to catch up — ↓ 2.8%

Visitor Volume and Spending

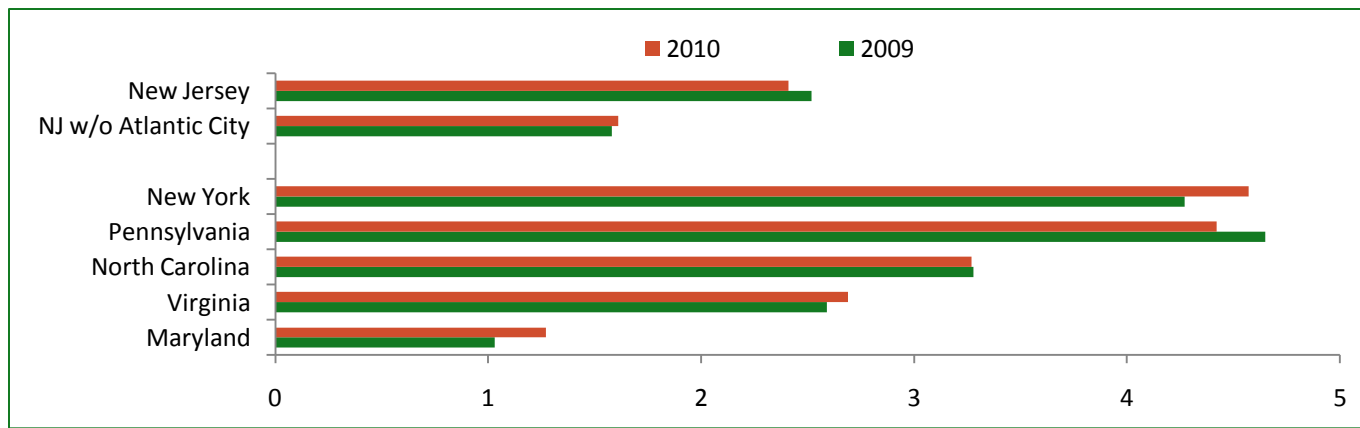
In 2010 the State excluding Atlantic City experienced stronger growth in visitation than did the State with Atlantic City included. At the same time the declines in spending were greater among those visiting other parts of the State than among those visiting the Atlantic City region. Since these folks spend over 25% less, the overall impact is that even though total visitation went up, total spending went down.

The impact of the changes in visitation and spending on New Jersey's share of the total U.S. travel market has been mixed. The State as a whole has lost market share since 2007. Over the

same time period, when Atlantic City is excluded, the State has actually gained market share. New Jersey's competitors have had mixed results with 4 of the 5 showing either gains or no change in 2010. Only Pennsylvania showed a decline of market share in 2010.

Market Share

OVERNIGHT LEISURE PERSON-STAYS



Loss in Market Share —
due to Atlantic City declines

Pennsylvania — only
competitor to lose share

Who are New Jersey's visitors?

New Jersey's Overnight Leisure Visitors tend to be slightly older than visitors to the average U.S. destination. Their median income is higher than visitors to average U.S. destination or to the competitive set and they are less likely to have children in their households.

New Jersey considered without Atlantic City is more similar to the average U.S. destination and to its competitive set than to New Jersey as whole. Only income is more similar to the entire State.

New Jersey, in either analysis (with or without Atlantic City), is

more likely to attract Boomers than the average U.S. destination or its competitive set. However the same is not true for GenX. New Jersey without Atlantic City is more likely than New Jersey as a whole, the average U.S. destination or its competitive set to attract GenXers. Conversely, it is also more likely than all other geographies to attract the oldest generations.

How do New Jersey's visitors compare?

	New Jersey	New Jersey w/o Atlantic City	Average U.S. Destination	Competitive Set (NY/PA/MD/VA/NC)
Average Age (yrs.)	46	44	44	45
Employed	75%	80%	69%	69%
Retired	9%	4%	9%	9%
Median Income (000)	\$88.7	\$87.6	\$72.1	\$76.8
Children in HH	37%	45%	43%	42%
Generations:				
Millennial	14%	15%	17%	15%
GenX	39%	43%	41%	41%
Boomer	35%	34%	30%	32%
Silent/GI	12%	18%	13%	12%

New Jersey Visitors:

Older

Employed

Higher Income

No Kids in Household

DKSA combines the three variables most likely to discriminate between travelers into seven Lifestages. These include age, household income and whether or not children are present in the household. These segments are generally used for promotion development and targeting.

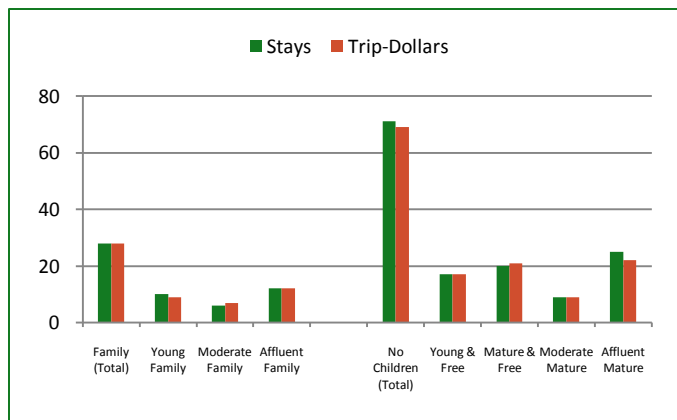
For New Jersey with and without Atlantic City included, visitors are more likely to belong to Lifestages with no children in the household. It is important to notice, however that except for the Mature and Free Lifestage, these Lifestages are the least profitable for the State. The combined family Lifestages are the most profitable, which is even more obvious in the New Jersey without Atlantic City analysis.

DKSA Lifestage Definitions

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

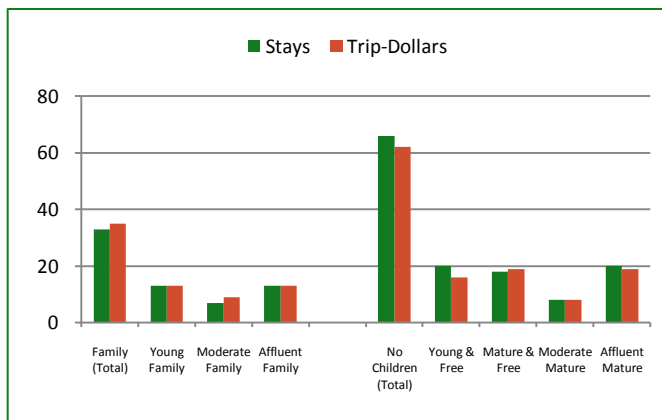
New Jersey

OVERNIGHT LEISURE STAYS (2008-2010)



New Jersey without Atlantic City

OVERNIGHT LEISURE STAYS (2008-2010)



Family Lifestages:
Most profitable
Least visitation

GLOSSARY

Trip Dollars: A comparison of Trip-Dollars (Direct Spending) to Stays allows for the analysis of the financial contribution a certain segment of travelers makes to a destination

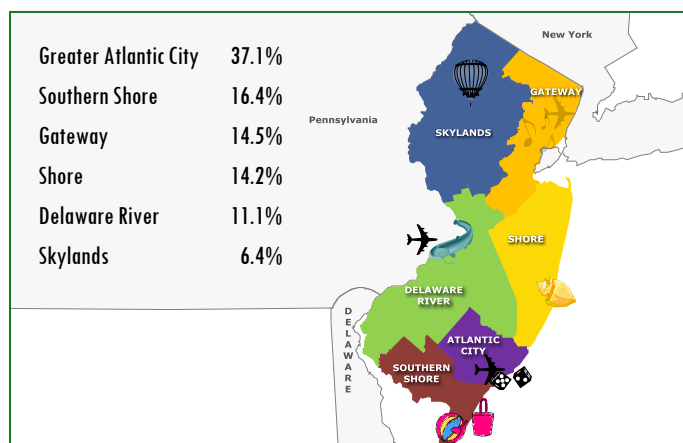
Where do New Jersey's visitors come from?

More than 4 out of 5 New Jersey visitors come from 8 states with almost 30% 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 almost 90% of travel to New Jersey is by auto and that the average one-way distance traveled is about 300 miles — more than 100 miles less than the to the average U.S. destination or to New Jersey's competitive set. Like the U.S., drive distances to New Jersey have been creeping up since 2008.

New Jersey Destination Regions

OVERNIGHT LEISURE SHARE OF PERSON-STAYS



New Jersey Origin States

OVERNIGHT LEISURE SHARE OF PERSON-STAYS

New Jersey	27.8%
New York	21.8%
Pennsylvania	15.1%
Maryland	5.3%
Connecticut	4.5%
California	3.3%
Virginia	3.2%
Other	19.0%

Where do New Jersey's visitors go?

Although the Greater Atlantic City Region continues to receive the largest share of New Jersey's Overnight Leisure visitors the share of visitation to this region has been declining since at least 2006 at which time 55% of travel to New Jersey was to the Greater Atlantic City Region.

The importance of Atlantic City to this region and to the State can not be overlooked, however. When Atlantic City is excluded from the analysis, the share of travel for this region drops to just over 3%, representing a decline of over 50% since 2006.

Share of travel to all other regions has been increasing over the past couple of years.

Two-thirds of New Jersey visitors come from tri-state area

Why do travelers visit New Jersey?

Travelers to New Jersey primarily visit for shorter getaway weekends or to visit friends and relatives. The reasons for visiting New Jersey vary substantially depending on whether Atlantic City is included in the analysis or not.

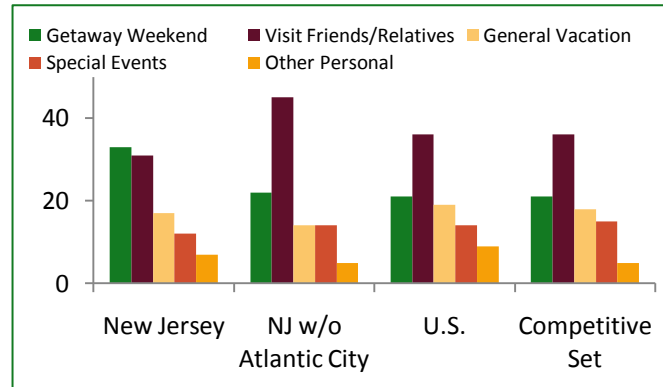
Getaway weekends represent one-third of all overnight leisure travel to the State and visiting friends and relatives makes up about 31% of travel. If Atlantic City is excluded getaway weekends drop to just 22% and visiting friends and relatives jumps to 45%. The share of those taking longer vacations or attending special events is similar regardless of whether or not Atlantic City is included in the analysis. This pattern is similar for the average U.S. destination as well as New Jersey's competitive set.

The impact of this shift is seen in the per-person-per-day trip expenditures, which are much lower for New Jersey without Atlantic City than for the State as a whole. Excluding entertainment and transportation, the total State is very similar to both the U.S. and the competitive set in each spending category. The higher entertainment and lower transportation make the average per-person-per-day spending in New Jersey very similar to the U.S. average and to the competitive set.

When Atlantic City is excluded from the analysis the average per-person-per-day spending drops by \$26, indicating that those who visit Atlantic City are much more valuable visitors than those who

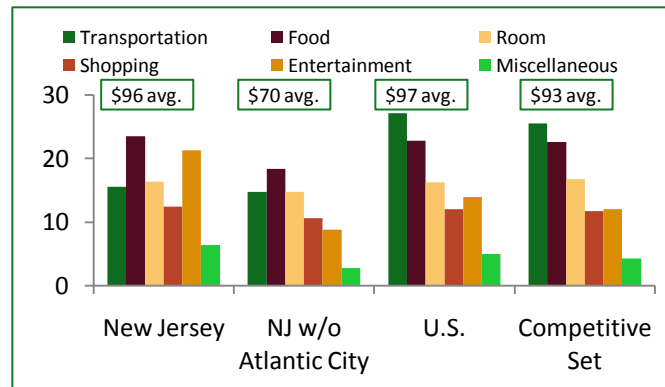
Purpose of Travel

OVERNIGHT LEISURE PERSON-STAYS



Per-Person-Per-Day Spending

OVERNIGHT LEISURE



Getaway Weekends
Visit Friends and Relatives

Where do New Jersey visitors stay?

visit the balance of the State. This makes sense as those who visit friends/relatives are less likely to spend money on food, entertainment or shopping. It is interesting that the daily amount spent on accommodations is only slightly less for New Jersey without Atlantic City especially considering that while 53% of visitors to the entire State stay in paid accommodations only 33% who visit the balance of the State do so. New Jersey as a whole hosts more visitors staying in paid lodging than the average U.S. destination or their competitive set.

Among those who stay in paid accommodations, however, of those

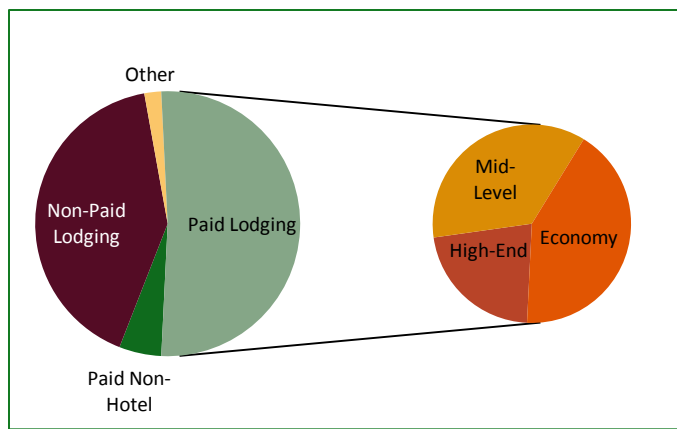
visiting non-Atlantic City destinations, 88% stay in high and mid-level accommodations. When Atlantic City is included, this percentage drops to 55%. Hence the higher per-person-per-day accommodation spending for the State without Atlantic City.

Overall, overnight leisure visitors to New Jersey stay approximately 2.3 nights, which is below both the U.S. average and the competitive set, each at about 2.8 nights. New Jersey without Atlantic City is close at 2.7 nights. Approximately 17% of New Jersey's stays are 4 or more nights. This jumps to 22% when Atlantic City is excluded. Of course the longer the stay the more valuable the visit.

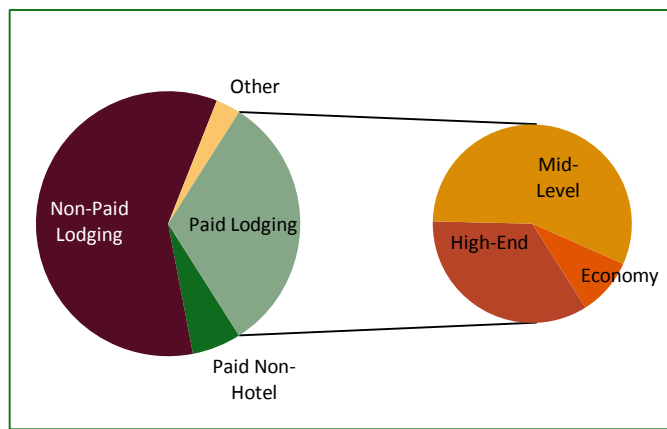
New Jersey without Atlantic City

New Jersey

OVERNIGHT LEISURE PERSON-STAYS



OVERNIGHT LEISURE PERSON-STAYS



Those who stay in hotels, choose Economy

What do New Jersey visitors do?

The activities people engage in while visiting New Jersey vary widely depending on whether Atlantic City is considered or not. The most obvious difference appears when looking at the top five activities engaged in by New Jersey visitors.

For the State as a whole, the top five activities are:

1. Dining
2. Entertainment
3. Beach, Waterfront
4. Gambling
5. Shopping

When considering the State excluding Atlantic City, not only does the order change, but gambling completely falls out of the top five and is replaced by sightseeing, a much less lucrative activity. In fact, gambling ranks only 13th for this portion of the State.

1. Beach, Waterfront
2. Dining
3. Shopping
4. Entertainment
5. Sightseeing

Until 2008, gambling had been the most popular activity in New Jersey. However, participation in gambling has been declining since 2006 when 40% of visitors gambled on their trips to New Jersey. In 2010 this percentage dropped to only 24%.

In a recent generational analysis¹ of DKSA data it was noted that while nationally, gambling is still among the top five activities for Boomers, Silents and GIs, it does not even make the top ten for Millennials and GenXers. In fact, the trend for these groups is toward more family oriented, outdoor and cultural activities.

This may help explain why the State as a whole is losing U.S. market share, while the State excluding Atlantic City is gaining share.

Even so, visitors who engage in activities are more valuable than those who do not. Regardless of the activity they participate in on their trip, they represent a higher level of spending than they do visitation. Travel parties spending the most on their trips are visiting amusement parks, shopping, being entertained, boating or sailing and dining out.

Gambling ↓
Other activities ↑

¹ How Generations Travel – presented at 2010 TTRA in San Antonio, Texas

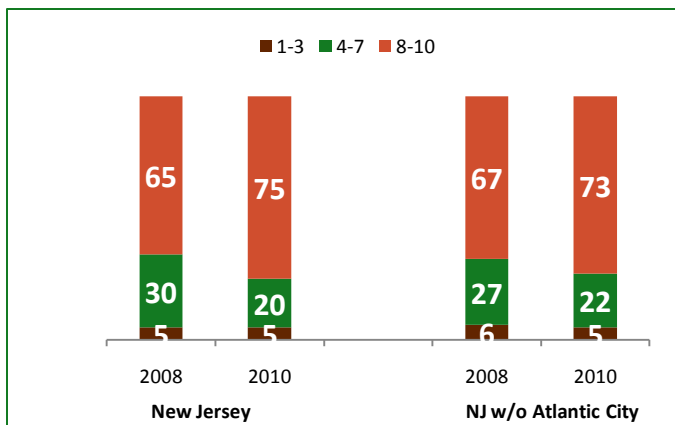
How do New Jersey visitors rate the State?

Respondents are asked to rate their overall satisfaction with the destinations they visit and on 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'.

New Jersey as well as its competitors have consistently received a high percentage of excellent (8-10) ratings for overall satisfaction with the destination. In fact, all but Pennsylvania moved over the Excellent line achieving average ratings of between 8.1 and 8.3 in 2010. These are similar to ratings for the average U.S. destination in 2010.

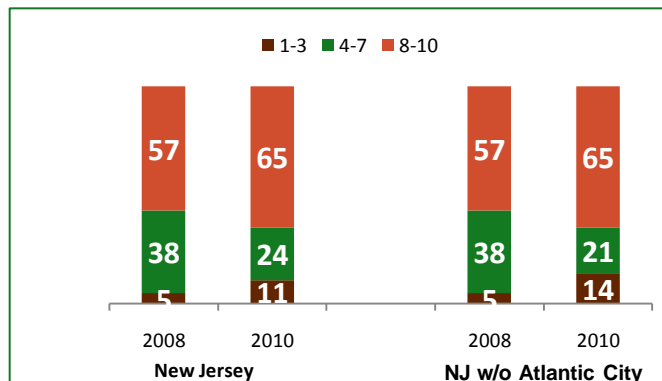
Overall Satisfaction

OVERNIGHT LEISURE PERSON-STAYS



Value for the Money

OVERNIGHT LEISURE PERSON-STAYS



While value is not rated as high as satisfaction, all averages, excluding Pennsylvania trended up slightly in 2010. This is the first time, however that New Jersey, in either analysis, received double digit percentages of poor ratings which were even higher for New Jersey without Atlantic City than for the entire State.

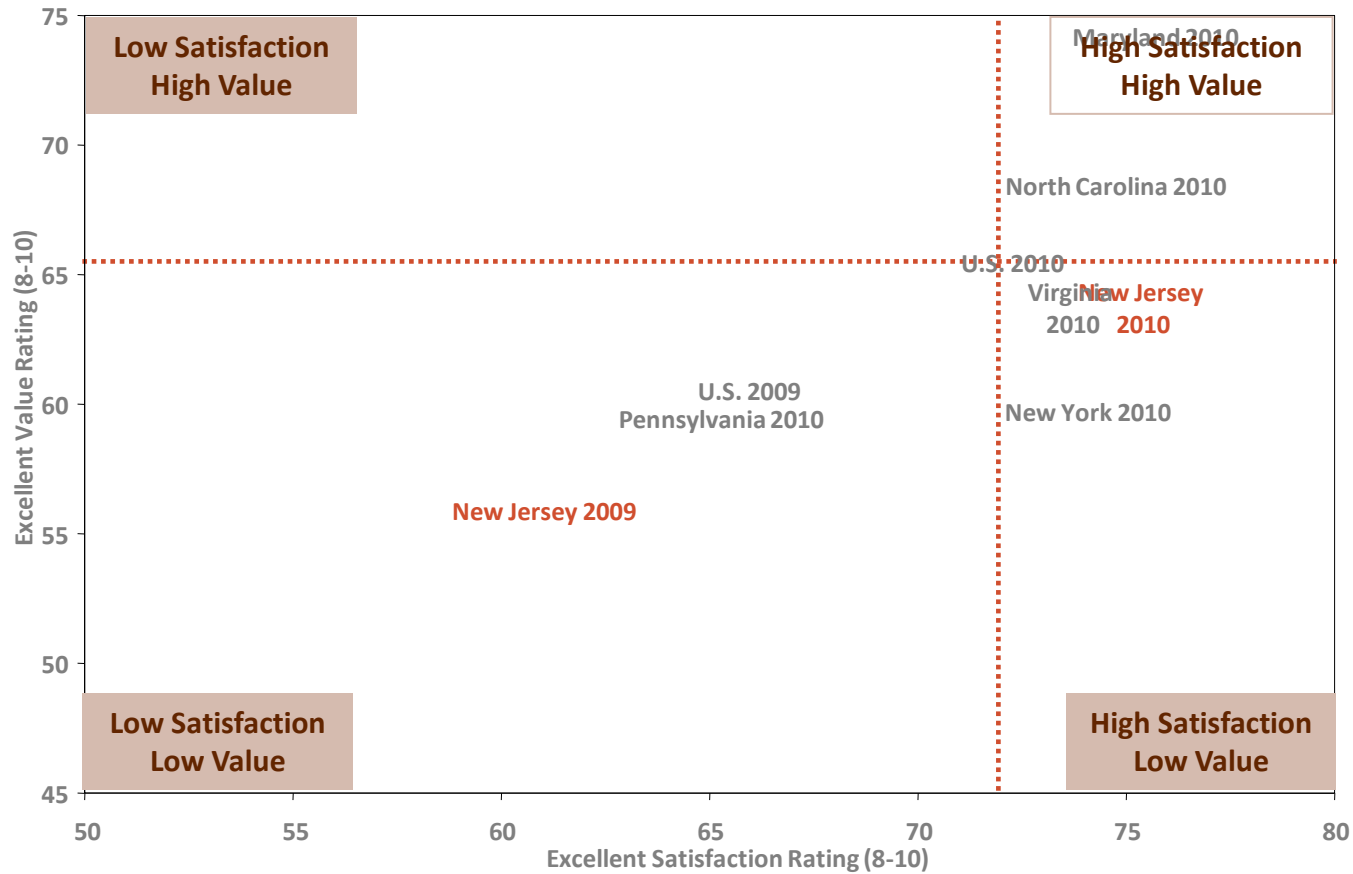
These data may be combined into a matrix which places each destination in the location where Satisfaction and Value intersect. Destinations fall into one of four quadrants. Those that are in the High Satisfaction, High Value quadrant have the most loyal visitors. Those visitors are most likely not only to return, but they are likely to spend more, as well as provide invaluable word-of-mouth recommendations. The graph on the next page shows these data for New Jersey, the U.S. average, and New Jersey's competitive set.

High levels of
Satisfaction
Value

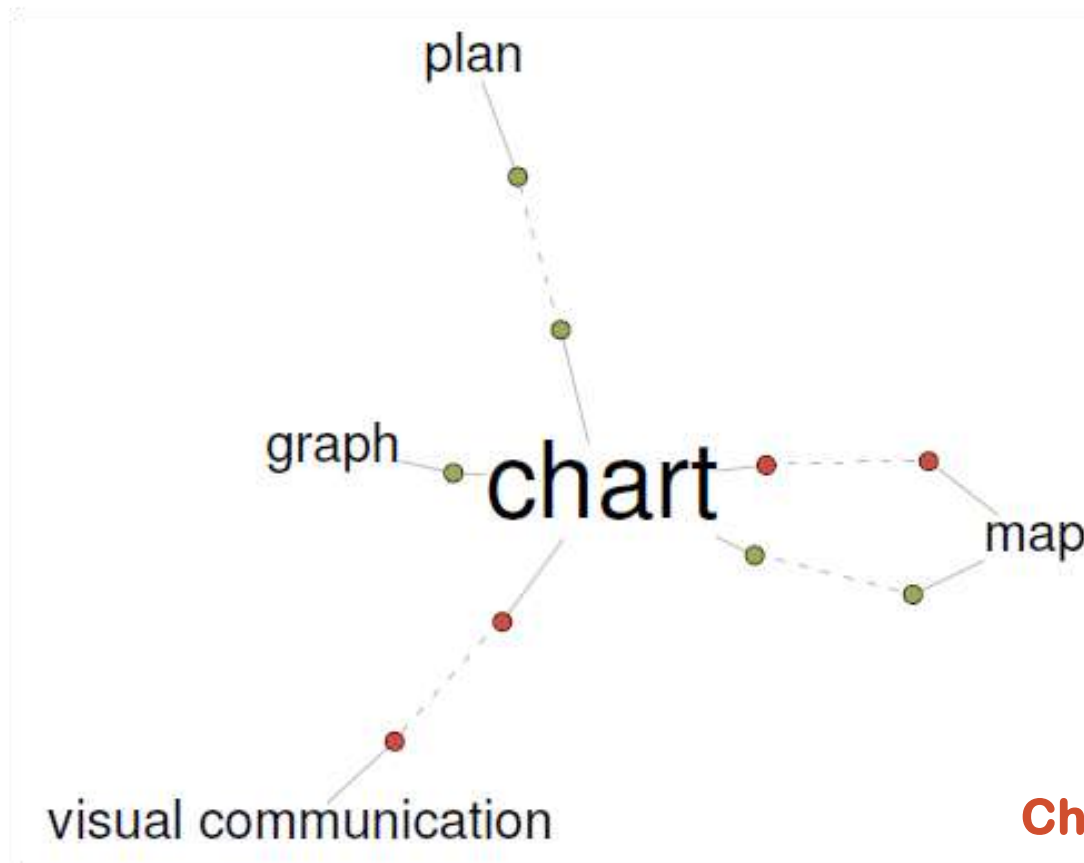
Satisfaction and Value

Overnight Leisure

EXCELLENT RATINGS PERSON-STAYS



Satisfaction ↑
Value ↑



Charts and Graphs

New Jersey Year-End 2010 Visitor Profile

U.S. Travel Segments

VOLUME

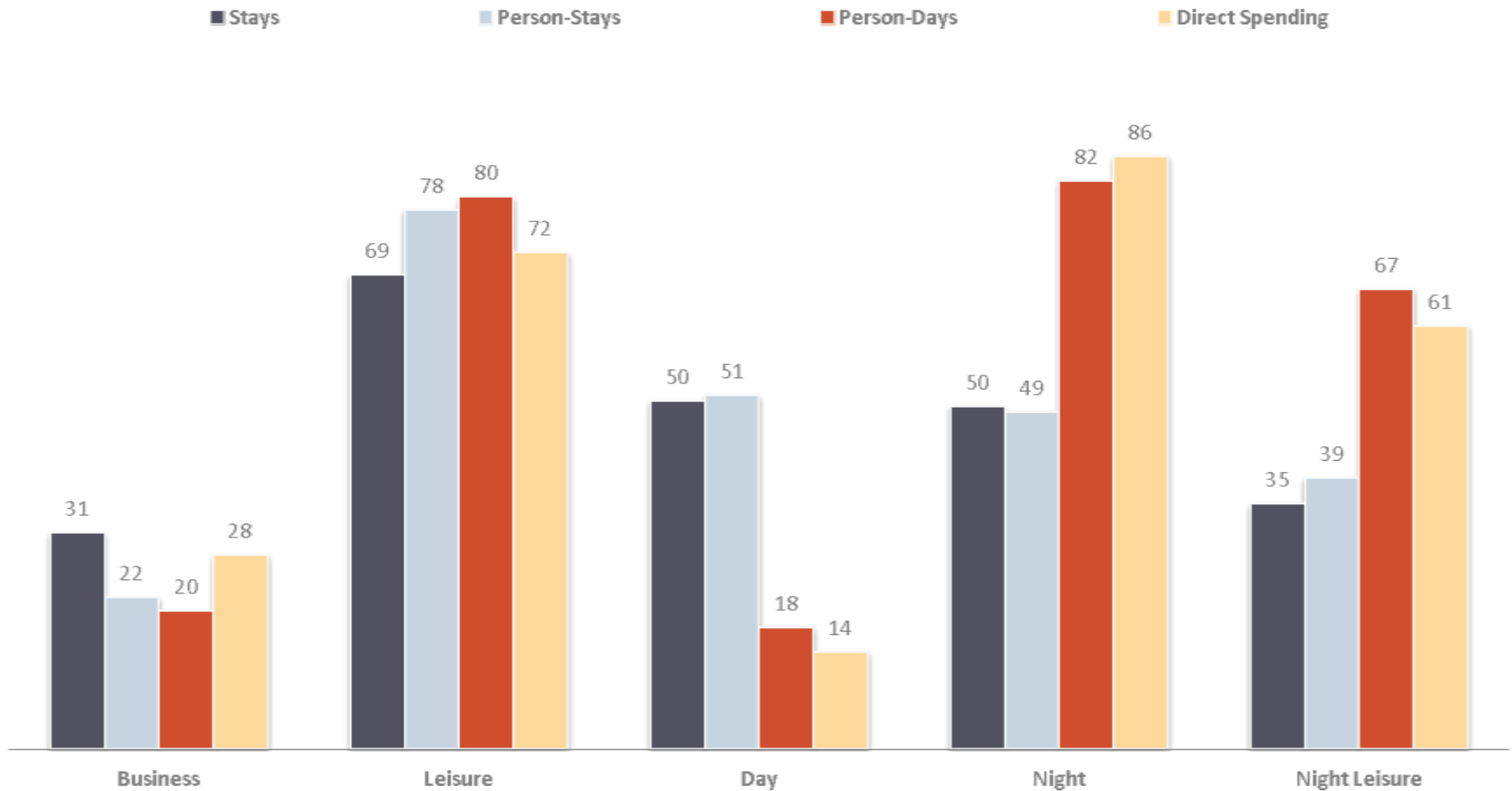
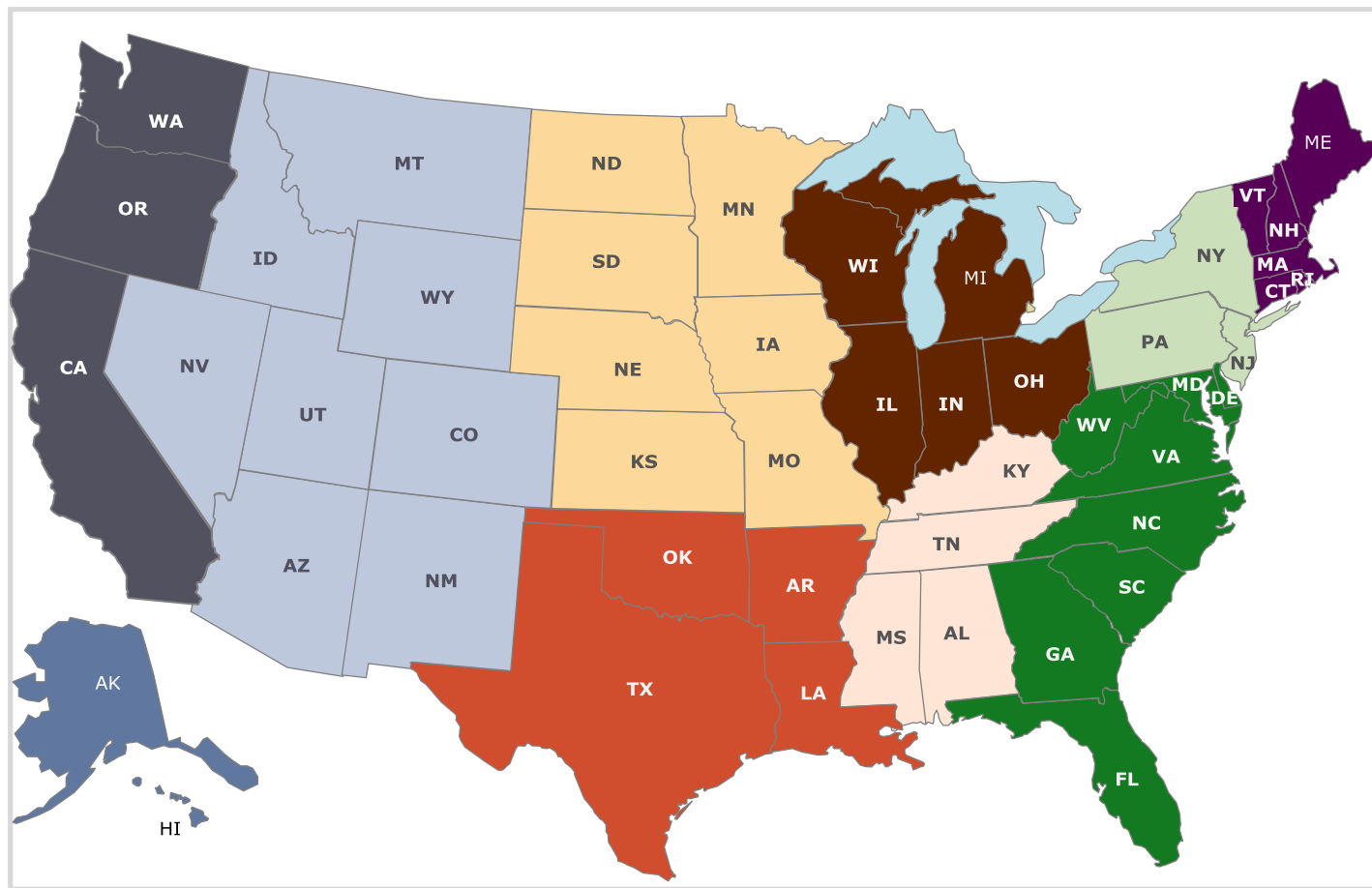


Chart 1 • Segment: 2010 Total Volume (%)

U.S. Travel Volume Change by Division

VOLUME



LEGEND

Pacific	8.6%
Rocky Mountain	4.9%
West North Central	3.3%
West South Central	5.1%
East North Central	5.1%
East South Central	4.2%
New England	5.8%
Middle Atlantic	5.9%
South Atlantic	8.2%

Chart 2 • Segment: 2010 Overnight Leisure Person-Stays (%)

New Jersey Person-Stays Volume

VOLUME

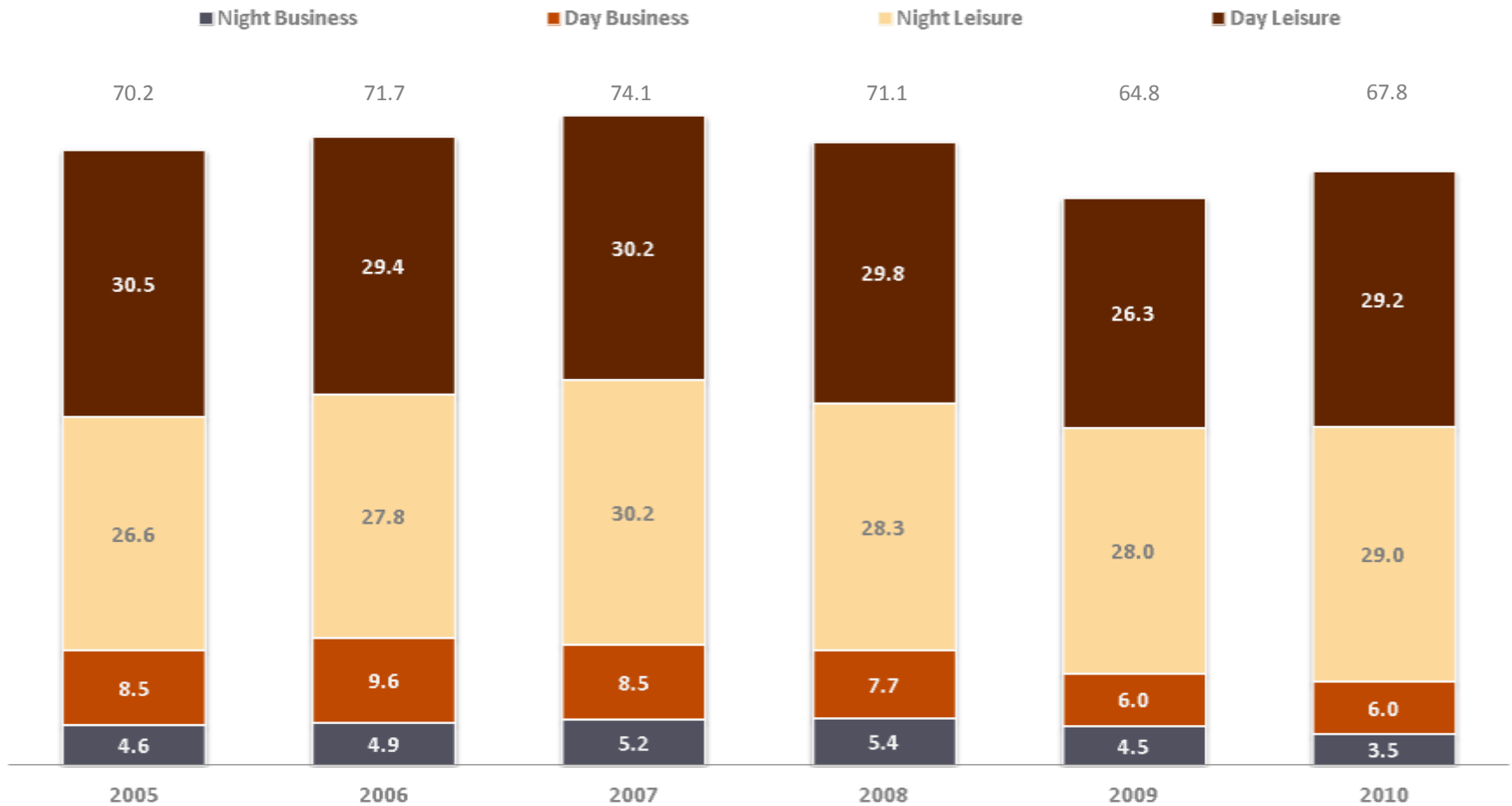


Chart 3 • in Millions

New Jersey Person-Stays Volume

VOLUME

	New Jersey					U.S.
	06/05	07/06	08/07	09/08	10/09	10/09
Total	2.1%	3.4%	-4.0%	-9.0%	4.6%	4.2%
Business	10.6%	-5.3%	-4.9%	-19.7%	-9.1%	-4.6%
Leisure	0.2%	5.6%	-3.8%	-6.6%	7.3%	7.0%
Day	0.0%	-0.7%	-3.1%	-14.0%	9.1%	4.8%
Night	4.8%	8.3%	-5.0%	-3.4%	0.2%	3.6%
Day Business	12.9%	-11.3%	-9.8%	-21.8%	-0.1%	-3.6%
Day Leisure	-3.7%	2.8%	-1.2%	-11.9%	11.3%	7.8%
Night Business	6.2%	6.7%	3.1%	-16.7%	-21.3%	-6.0%
Night Leisure	4.5%	8.6%	-6.4%	-0.9%	3.6%	6.2%

Chart 4 • % change

New Jersey Direct Spending Volume

DIRECT SPENDING

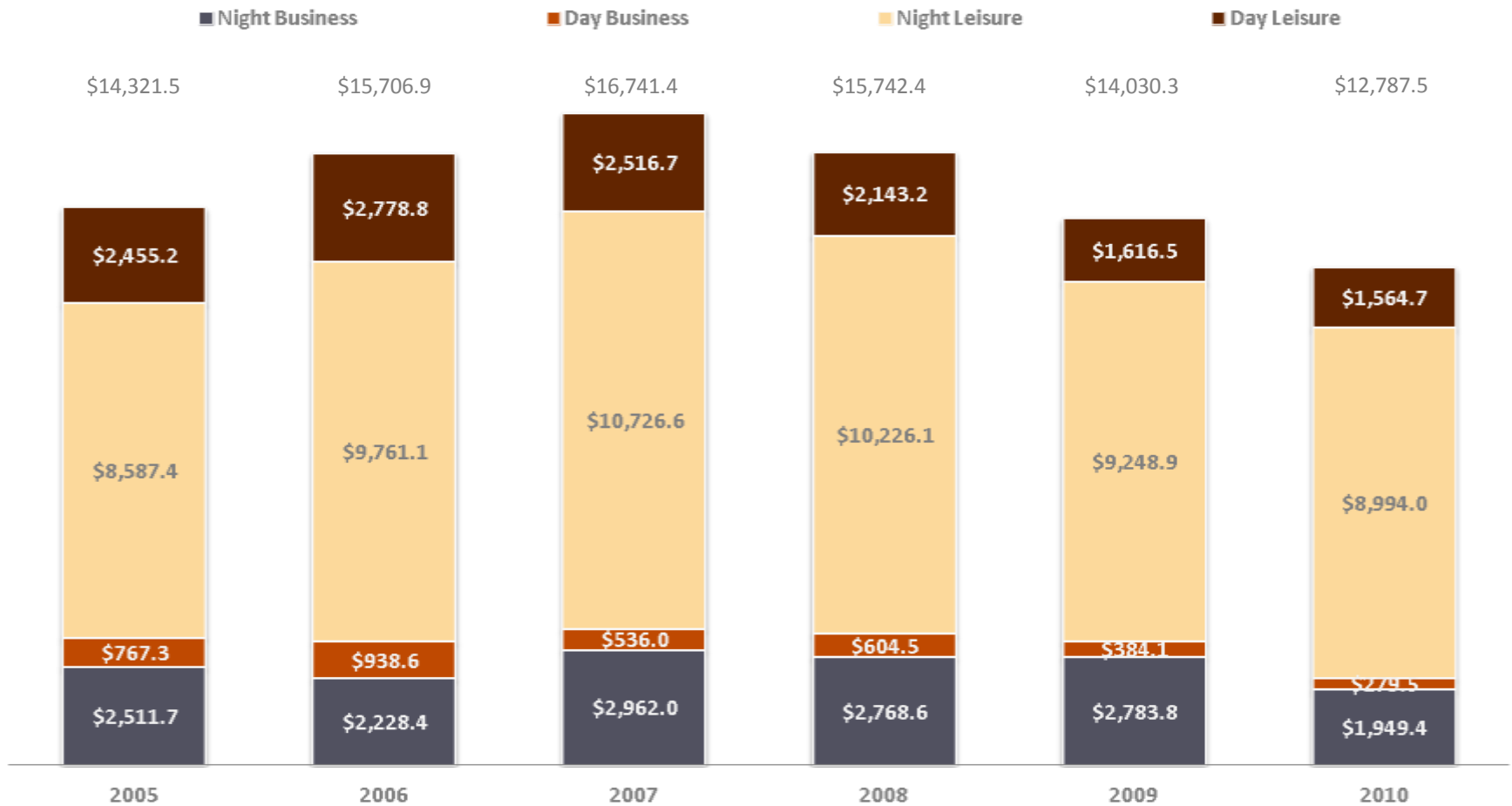


Chart 5 • \$ Millions

New Jersey Direct Spending Volume

DIRECT SPENDING

	New Jersey					U.S.
	06/05	07/06	08/07	09/08	10/09	10/09
Total	9.7%	6.6%	-6.0%	-10.9%	-8.9%	1.7%
Business	-3.4%	10.5%	-3.6%	-6.2%	-29.6%	-5.2%
Leisure	13.6%	5.6%	-6.6%	-12.2%	-2.8%	4.6%
Day	15.4%	-17.9%	-10.0%	-27.3%	-7.7%	0.5%
Night	8.0%	14.2%	-5.1%	-7.4%	-9.1%	1.9%
Day Business	22.3%	-42.9%	12.8%	-36.5%	-27.2%	-6.1%
Day Leisure	13.2%	-9.4%	-14.8%	-24.6%	-3.2%	3.0%
Night Business	-11.3%	32.9%	-6.5%	0.5%	-30.0%	-5.0%
Night Leisure	13.7%	9.9%	-4.7%	-9.6%	-2.8%	4.9%

Chart 6 • % change

New Jersey Travel Segments

MARKET SHARE

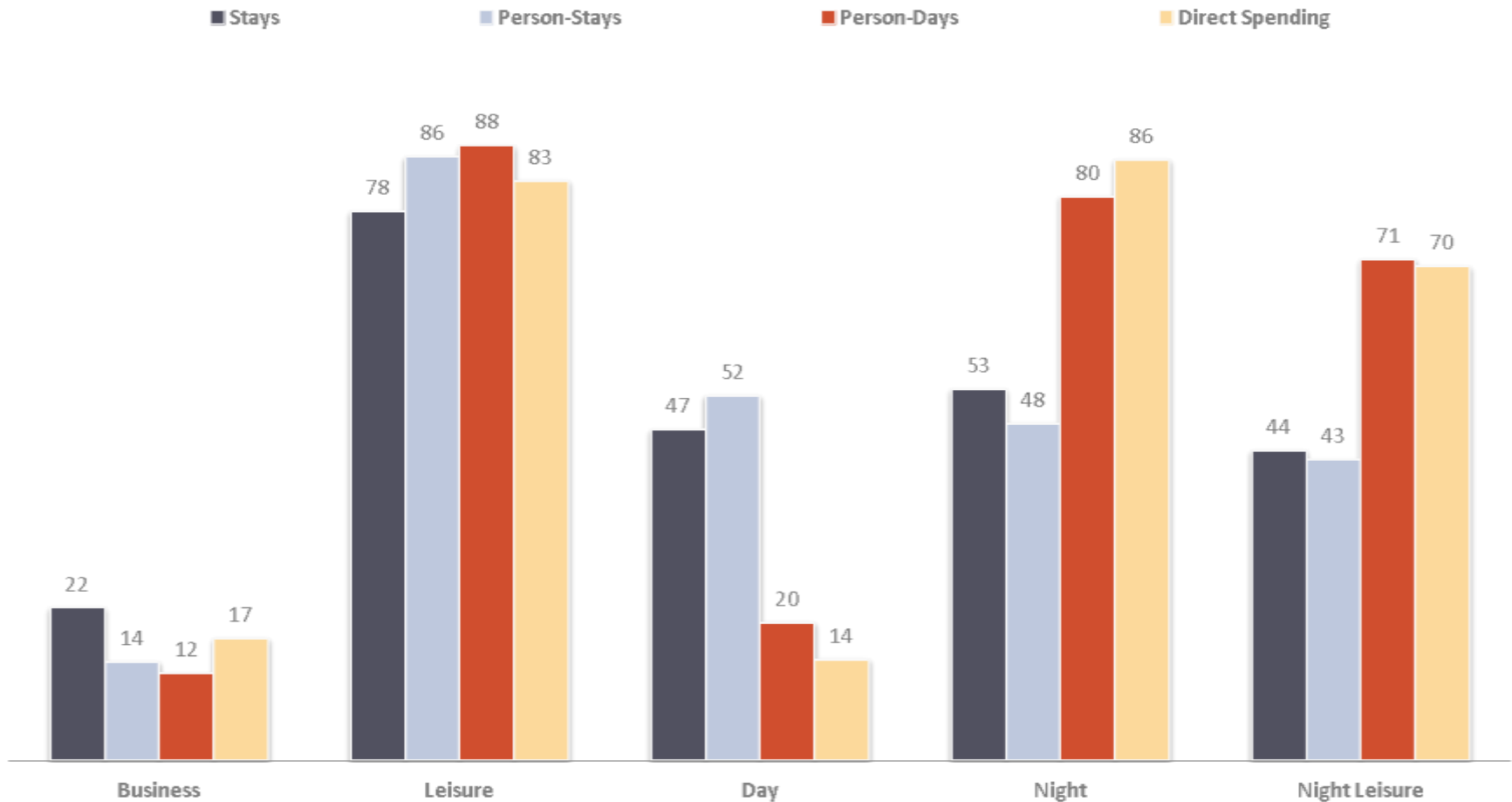


Chart 7 • Segment: 2010 Total Volume (%)

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

MARKET SHARE

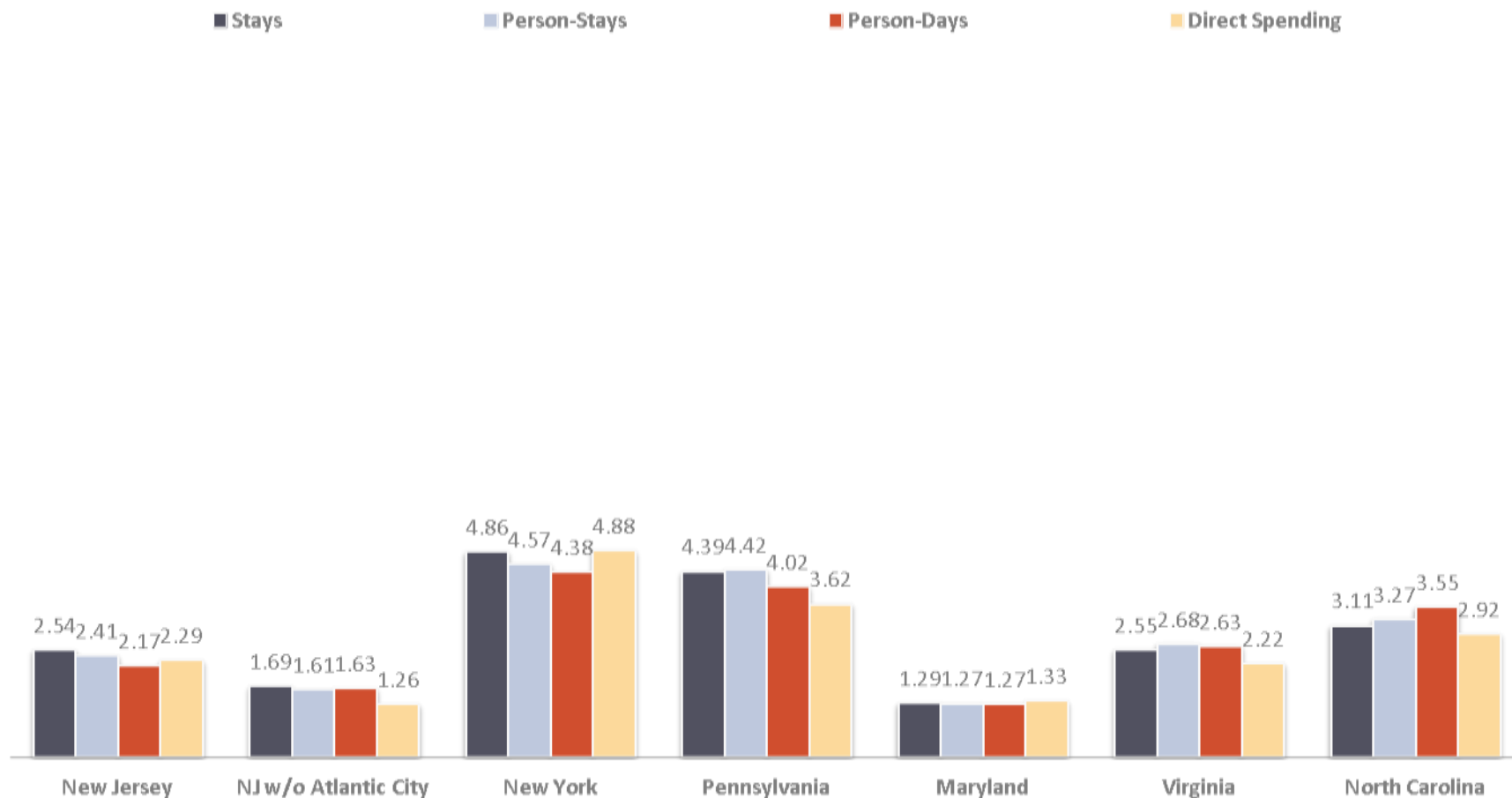


Chart 8 • Segment: 2010 Overnight Leisure (%) • New Jersey N = 880 household count

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

DEMOGRAPHICS

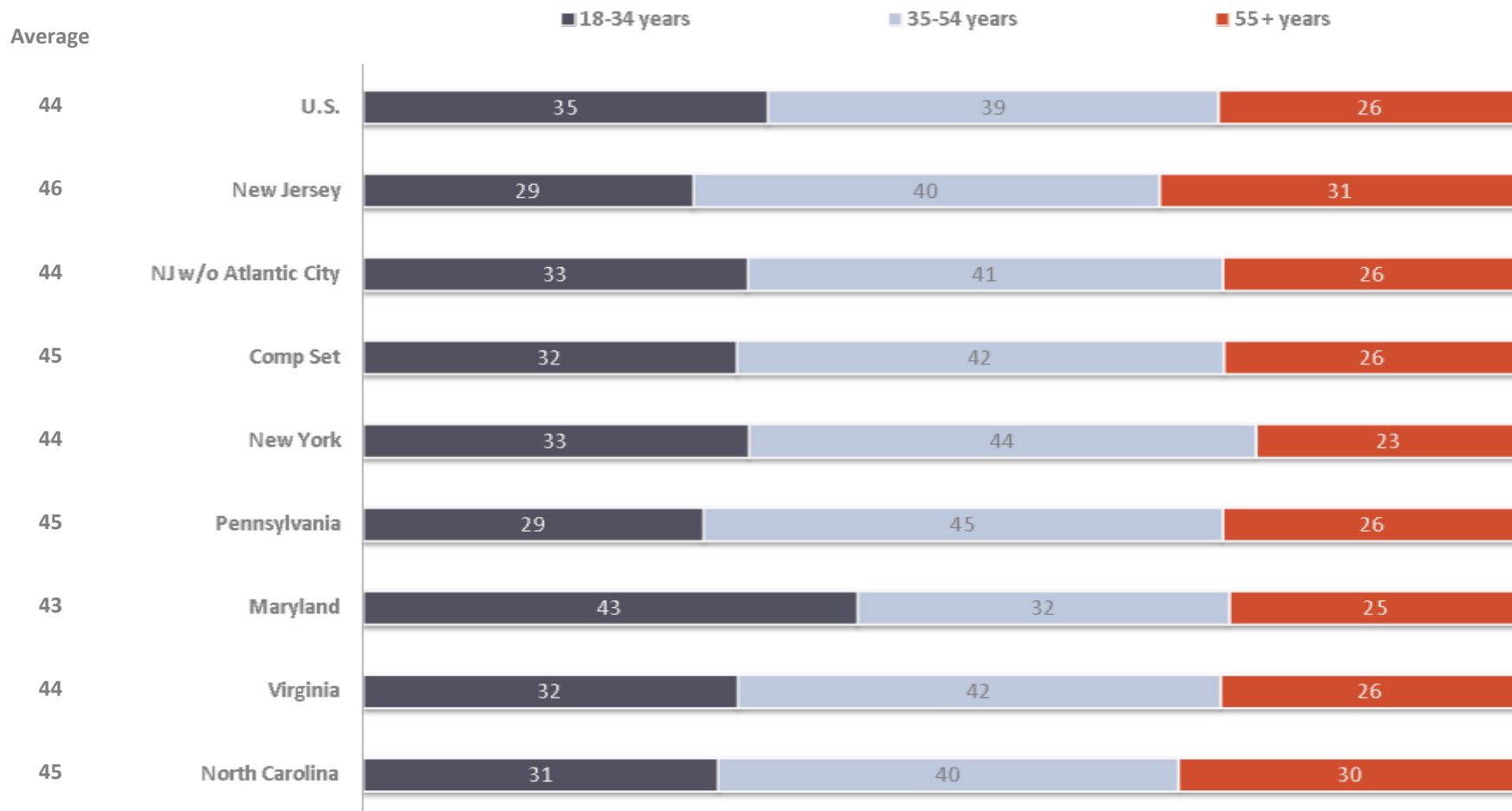


Chart 9 • Segment: 2010 Overnight Leisure Person-Stays (%) • New Jersey N = 880 household count

New Jersey Avg. Party per Trip Spending by Age

DEMOGRAPHICS

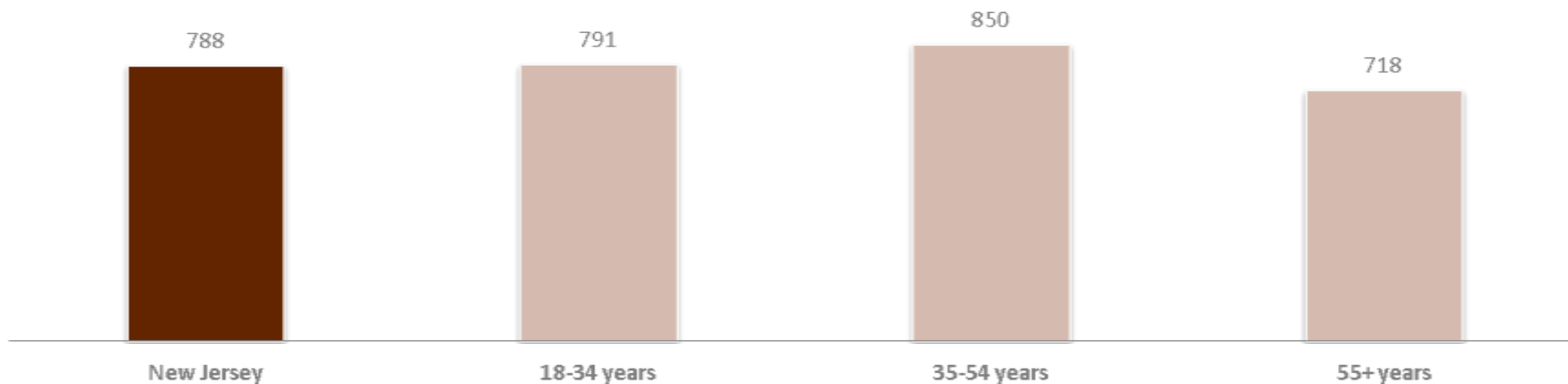


Chart 10 • Segment: 2008-2010 Overnight Leisure Stays (\$) • New Jersey N = 3,038 household count

GLOSSARY

Average Party per Trip Spending

Includes reported expenditures of all travelers (including transportation expenditure) who spend more than \$1 on their trip to or within the destination. Individual averages for subgroups of variables, such as accommodation types or activities might be higher than the total average party per trip spending for a destination because the travelers' spending is included only in those subgroups of variables to which the respondent replied.

New Jersey Age Comparison

DEMOGRAPHICS

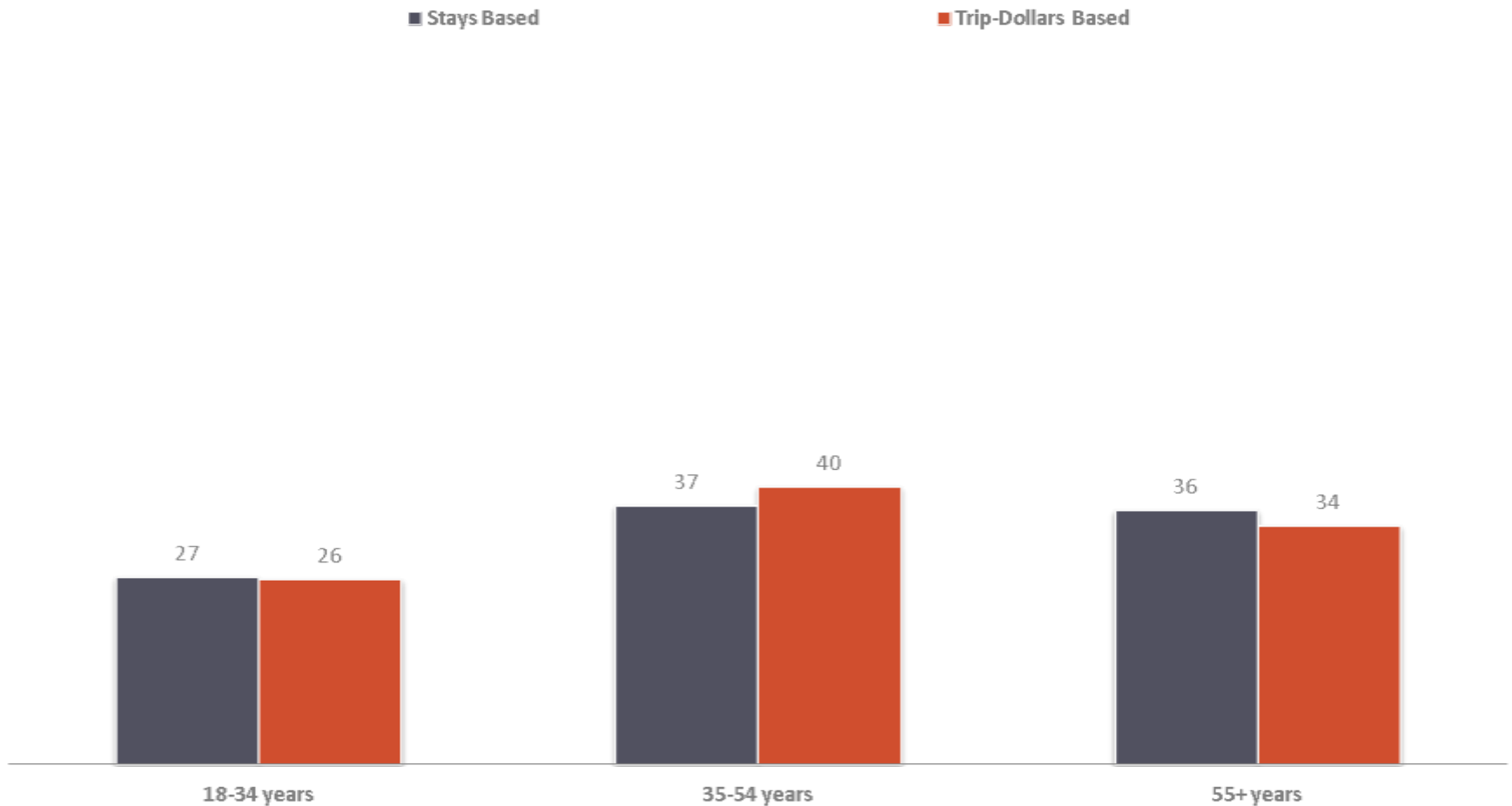


Chart 11 • Segment: 2008-2010 Overnight Leisure (%) • New Jersey N = 4,319 household count

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

DEMOGRAPHICS

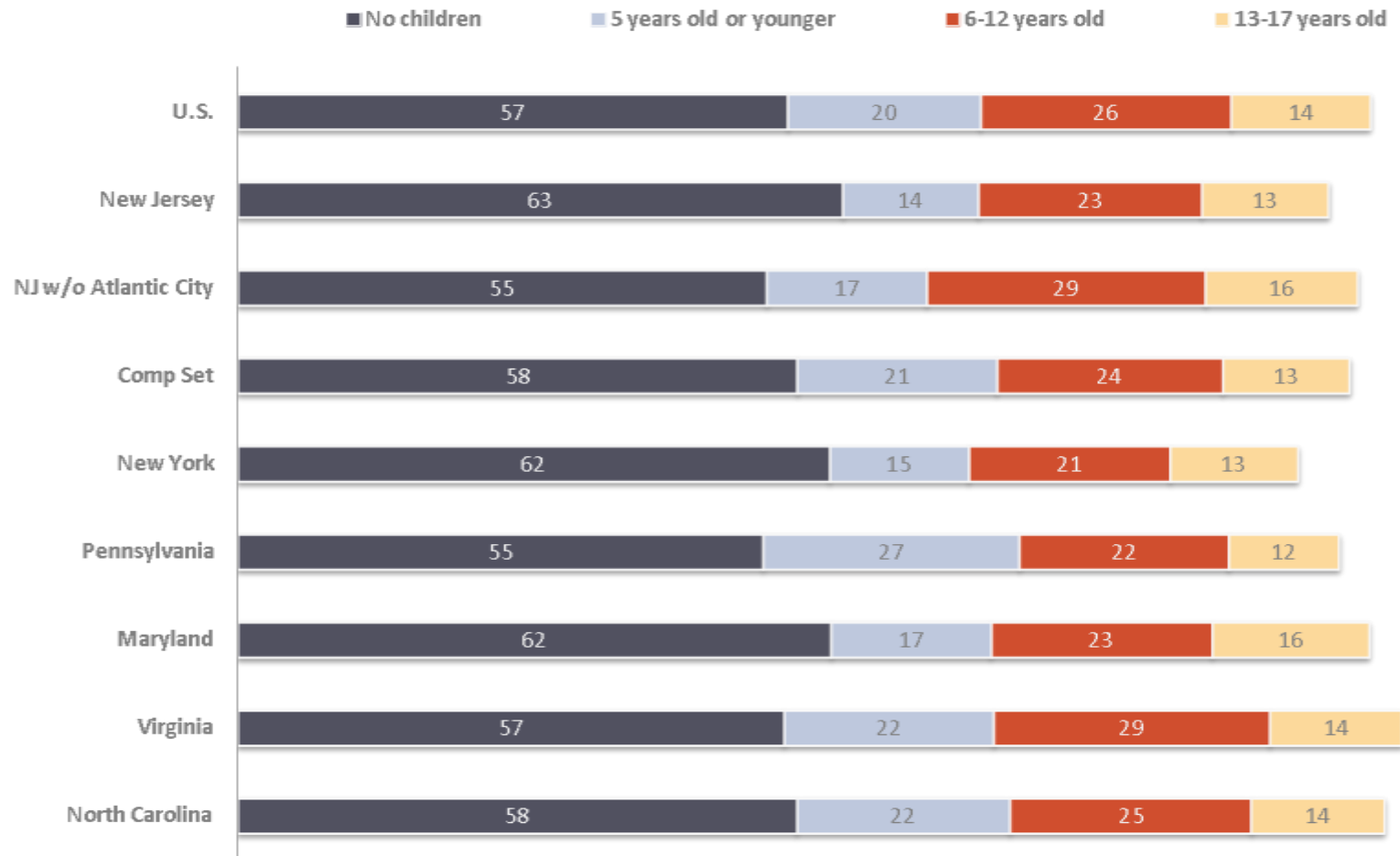


Chart 12 • Segment: 2010 Overnight Leisure Person-Stays (%) • New Jersey N = 880 household count

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

DEMOGRAPHICS

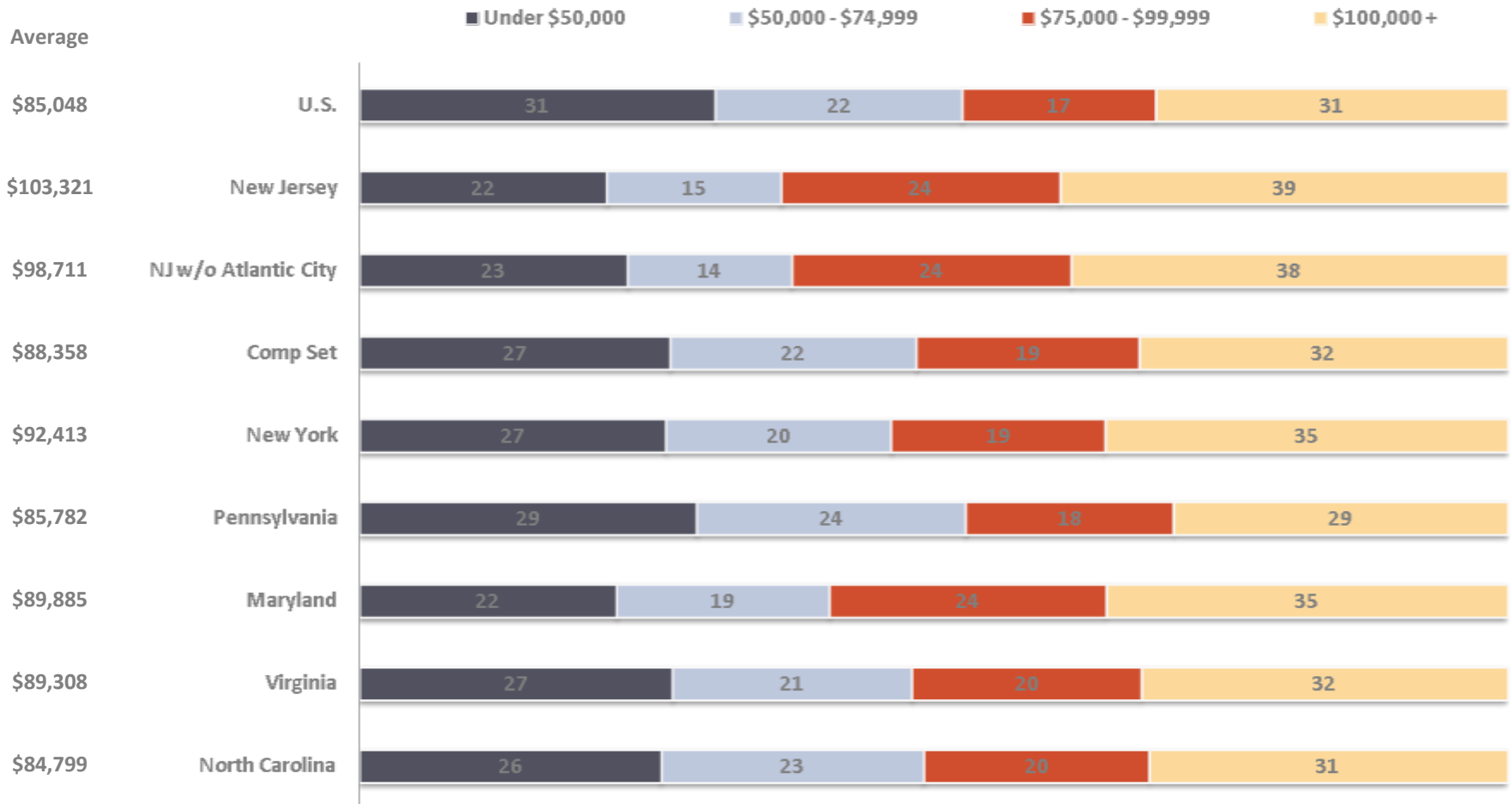


Chart 13 • Segment: 2010 Overnight Leisure Person-Stays (%) • New Jersey N = 878 household count

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

DEMOGRAPHICS

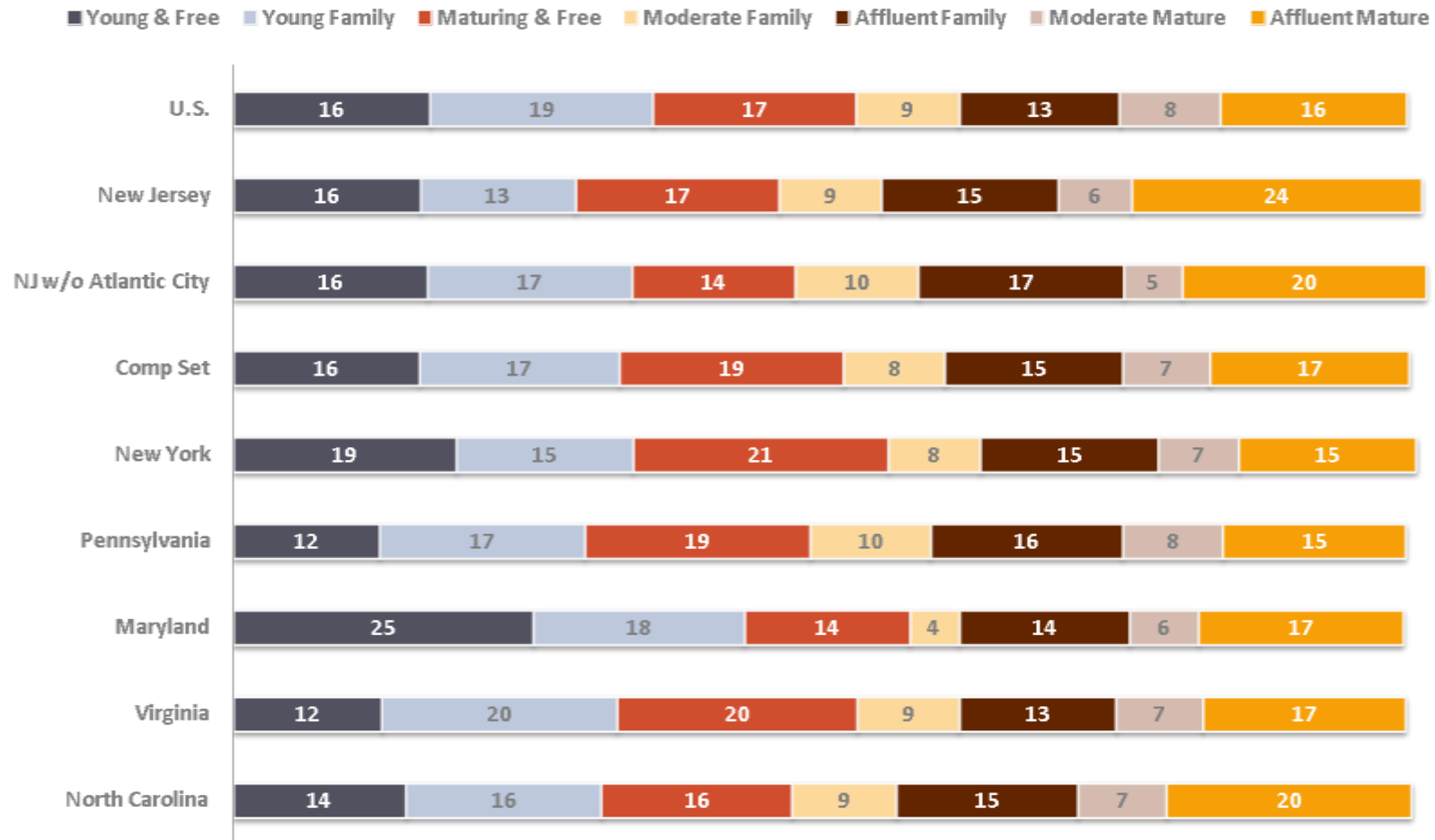


Chart 14 • Segment: 2010 Overnight Leisure Person-Stays (%) • New Jersey N = 880 household count

New Jersey Avg. Party per Trip Spending by Lifestage

DEMOGRAPHICS

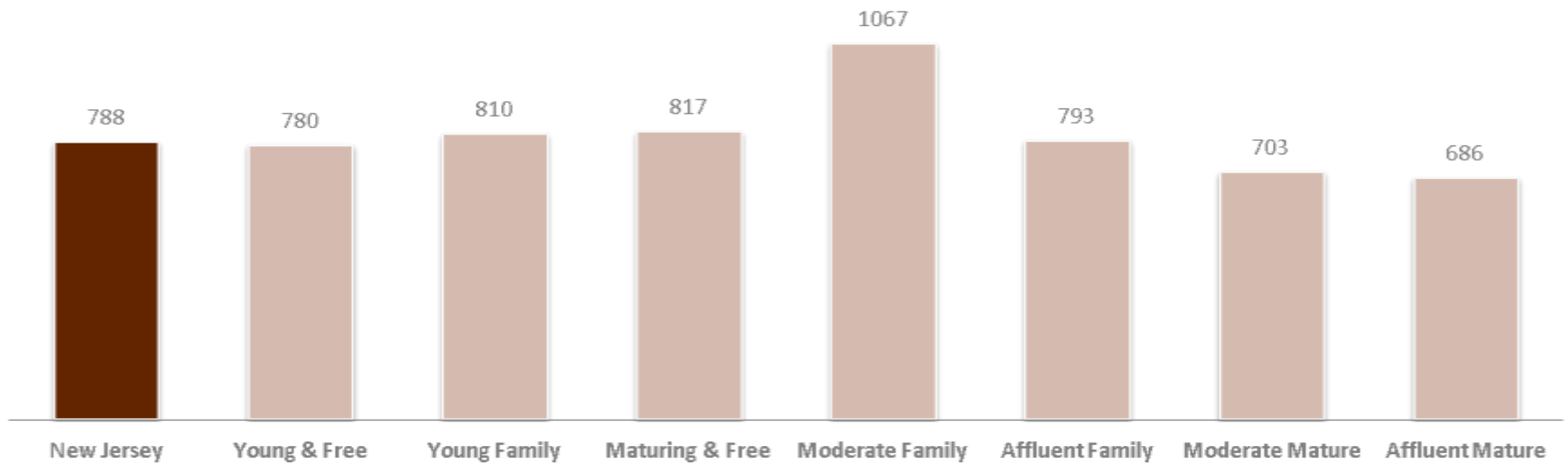


Chart 15 • Segment: 2008-2010 Overnight Leisure Stays (\$) • New Jersey N = 3,038 household count

New Jersey Lifestage Comparison

DEMOGRAPHICS

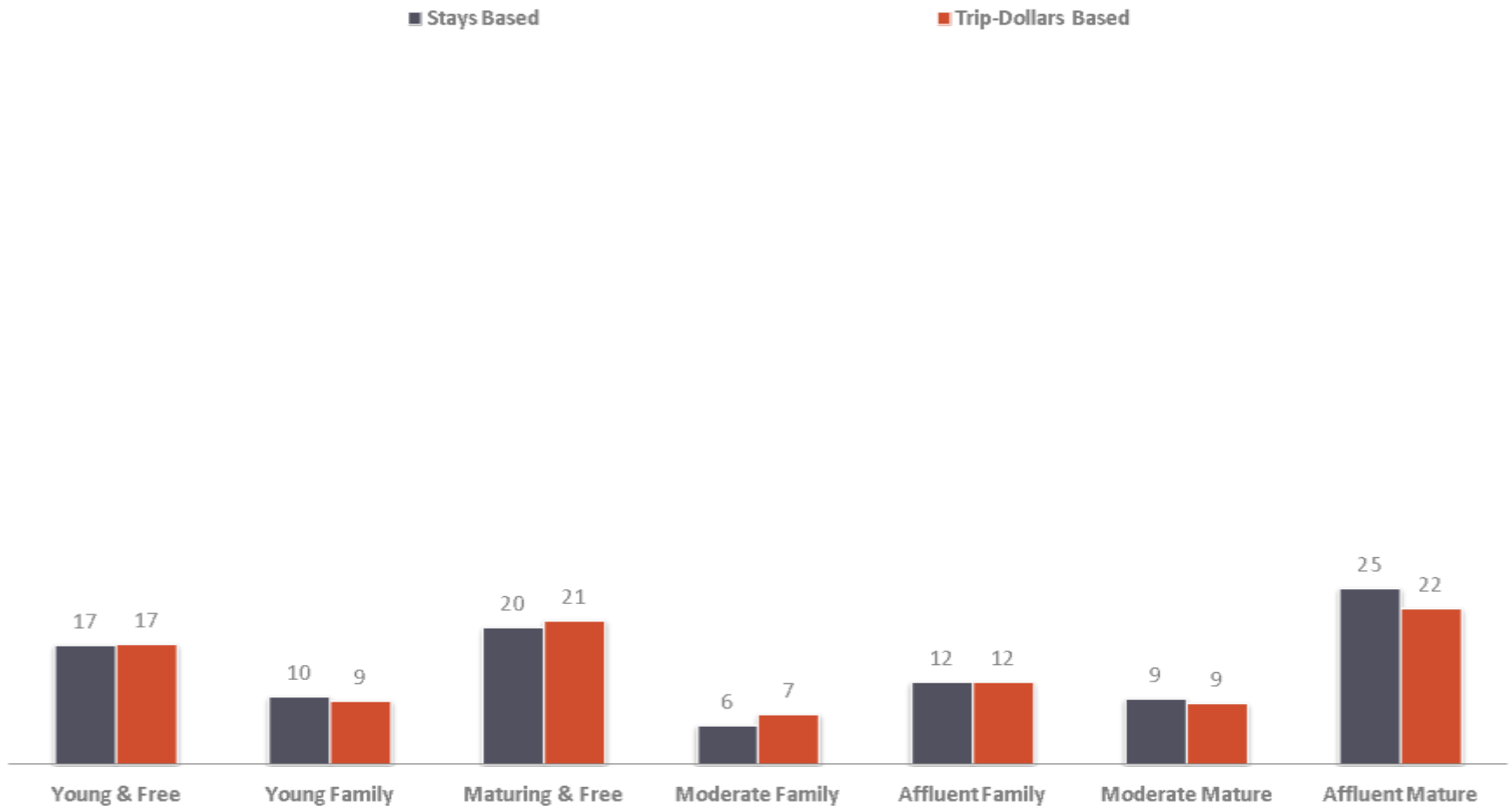


Chart 16 • Segment: 2008-2010 Overnight Leisure (%) • New Jersey N = 4,319 household count

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

DEMOGRAPHICS

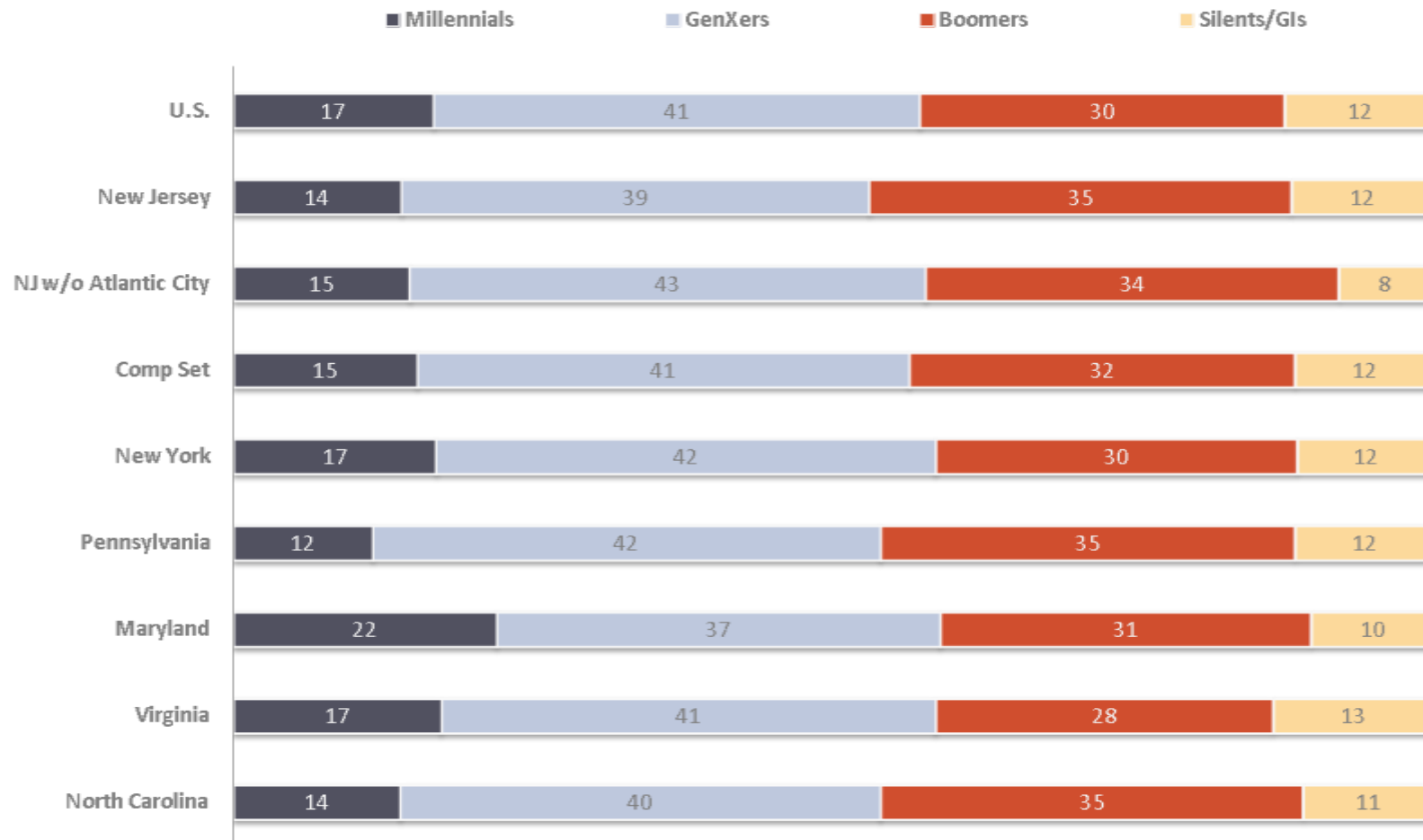


Chart 17 • Segment: 2010 Overnight Leisure Person-Stays (%) • New Jersey N = 880 household count

New Jersey Avg. Party per Trip Spending by Generation

DEMOGRAPHICS

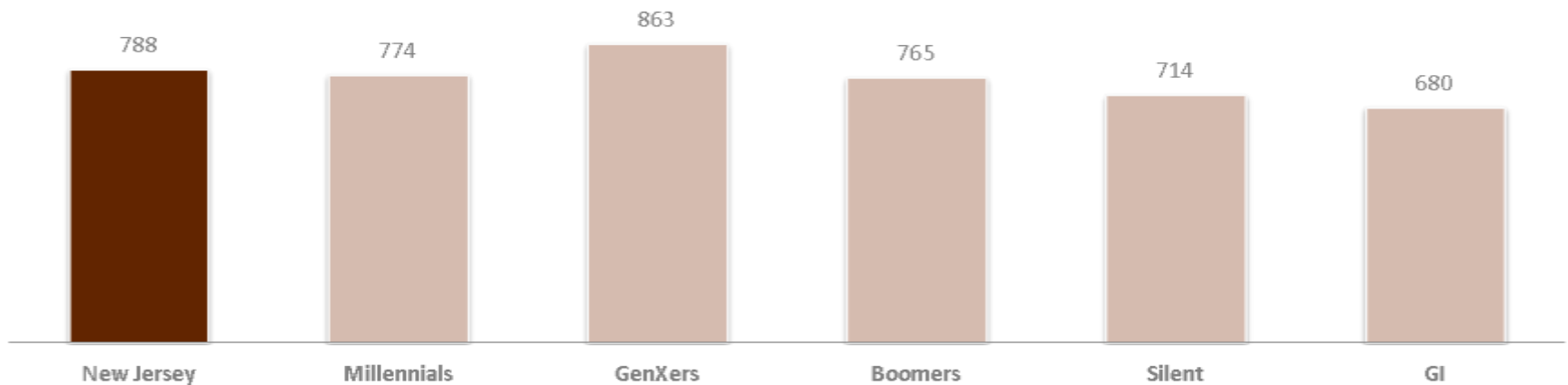


Chart 18 • Segment: 2008-2010 Overnight Leisure Stays (\$) • New Jersey N = 3,038 household count

New Jersey Traveler Generation Comparison

DEMOGRAPHICS

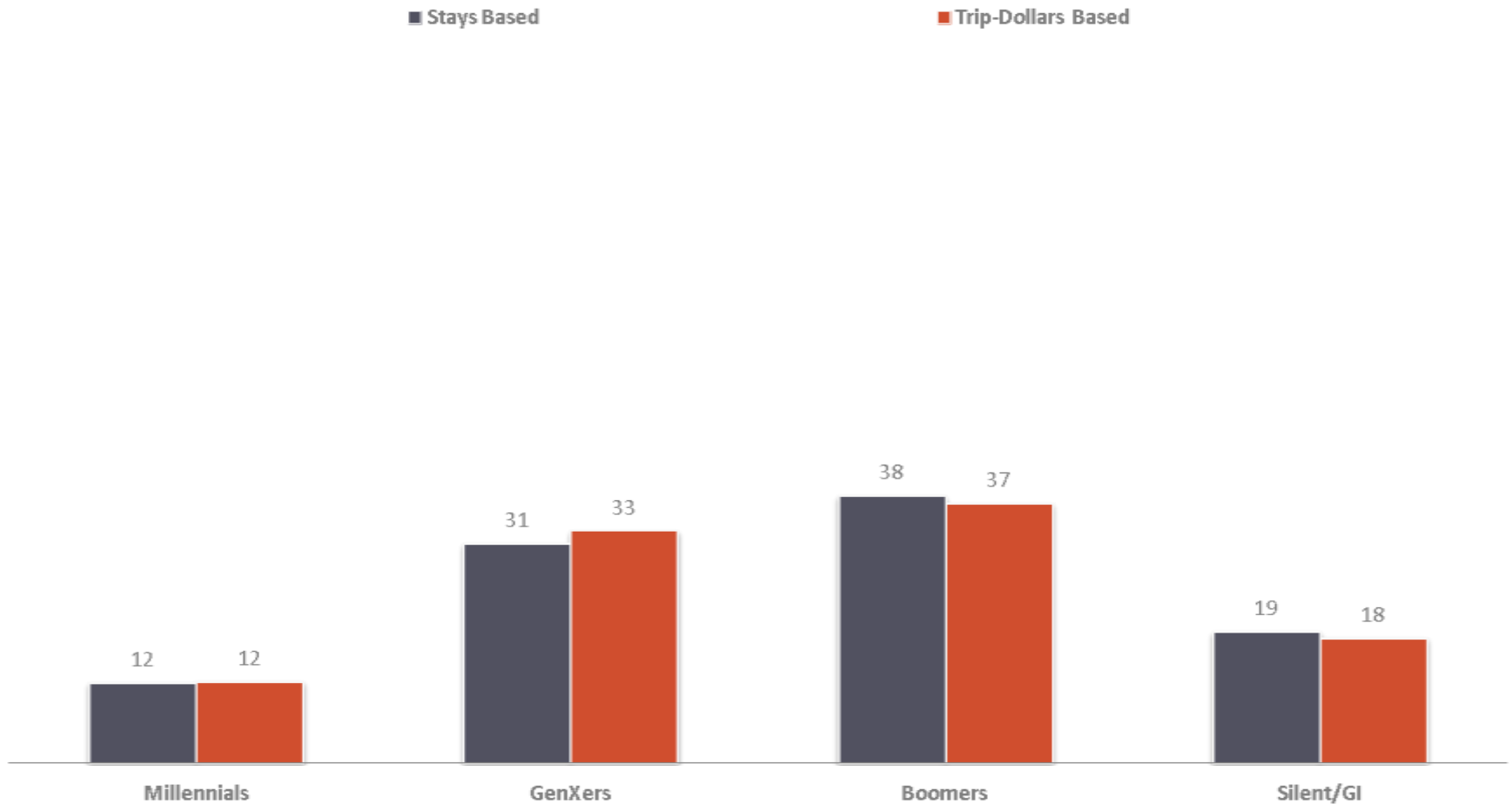


Chart 19 • Segment: 2008-2010 Overnight Leisure (%) • New Jersey N = 4,319 household count

Origin Divisions for Travel to New Jersey

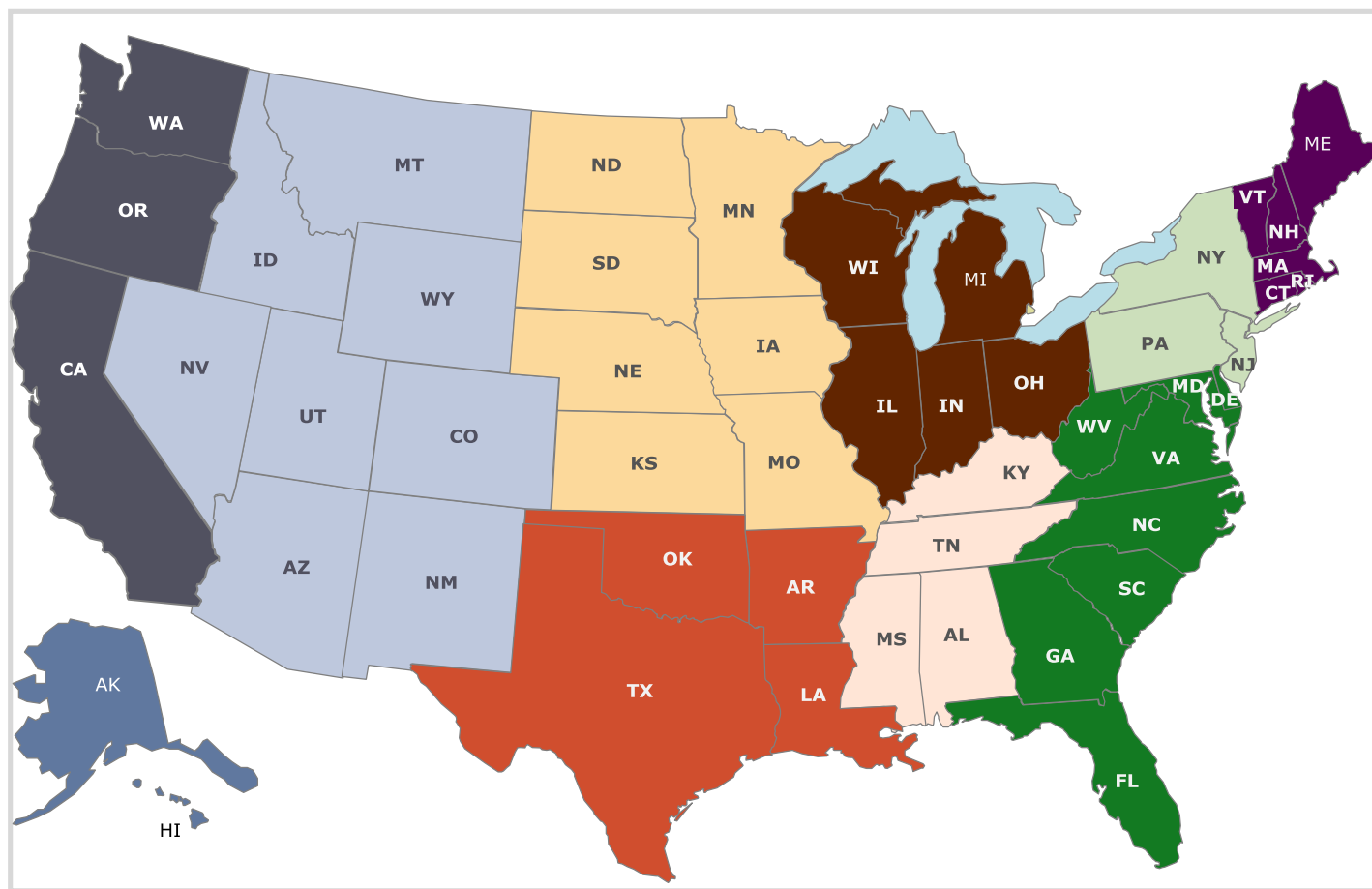


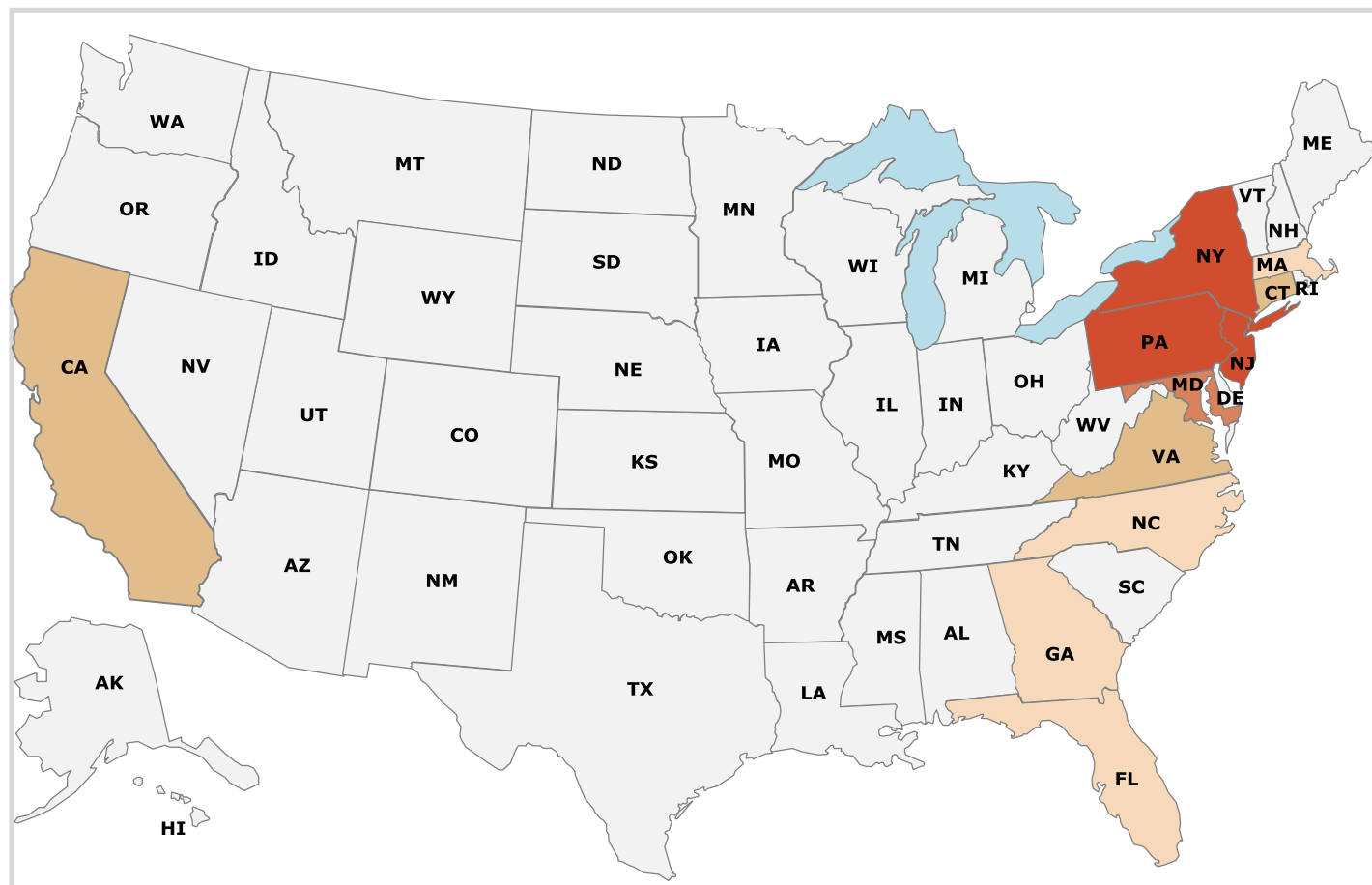
Chart 20 • Segment: 2010 Overnight Leisure Person-Stays (%) • New Jersey N = 880 household count

TRIP ORIGIN

LEGEND

Pacific	3.5%
Rocky Mountain	0.5%
West North Central	0.6%
West South Central	1.2%
East North Central	2.7%
East South Central	0.6%
New England	7.6%
Middle Atlantic	64.7%
South Atlantic	18.6%

Top Origin States to New Jersey



TRIP ORIGIN

LEGEND

	27.8% New Jersey
	21.8% New York
	15.1% Pennsylvania
	5.3% Maryland
	4.5% Connecticut
	3.3% California
	3.2% Virginia
	2.4% Massachusetts
	2.1% Florida
	1.9% North Carolina
	1.9% Dist. of Columbia
	1.3% Georgia

Chart 21 • Segment: 2010 Overnight Leisure Person-Stays (%) • New Jersey N = 880 household count

Top Origin DMAs to New Jersey

TRIP ORIGIN

	U.S.	New Jersey	NJ w/o Atl. City	Comp Set	New York	Pennsylvania	Maryland	Virginia	North Carolina
New York, NY	5.3%	41.9%	38.0%	12.0%	17.5%	15.8%	8.3%	7.4%	4.0%
Philadelphia, PA	2.3%	17.9%	17.5%	6.7%	4.4%	11.9%	13.0%	5.6%	1.4%
Washington, DC (Hagerstown, MD)	2.0%	5.4%	6.1%	6.2%	3.9%	5.3%	12.6%	12.3%	3.2%
Hartford & New Haven, CT	0.7%	4.3%	3.5%	1.0%	2.4%	0.7%	0.5%	0.8%	0.1%
Baltimore, MD	1.1%	4.0%	3.7%	3.6%	1.5%	3.2%	20.3%	2.9%	1.3%
Boston, MA (Manchester, NH)	2.0%	2.3%	3.1%	2.9%	6.7%	1.9%	0.6%	1.9%	0.8%
San Diego, CA	1.0%	1.4%	2.1%	0.2%	0.2%	0.0%	0.8%	0.2%	0.2%
Rochester, NY	0.5%	1.3%	2.0%	1.8%	4.5%	1.4%	0.1%	0.2%	0.5%
Wilkes Barre-Scranton, PA	0.3%	1.3%	1.3%	1.1%	0.7%	2.4%	0.9%	1.0%	0.0%
Buffalo, NY	0.7%	1.0%	0.7%	3.0%	7.8%	2.0%	0.7%	0.4%	0.6%
Top 10 Sum	15.9%	80.8%	78.0%	38.5%	49.6%	44.6%	57.8%	32.7%	12.1%

Chart 22 • Segment: 2010 Overnight Leisure Person-Stays (%) • New Jersey N = 879 household count

New Jersey Avg. Party per Trip Spending by Origin DMA

TRIP ORIGIN

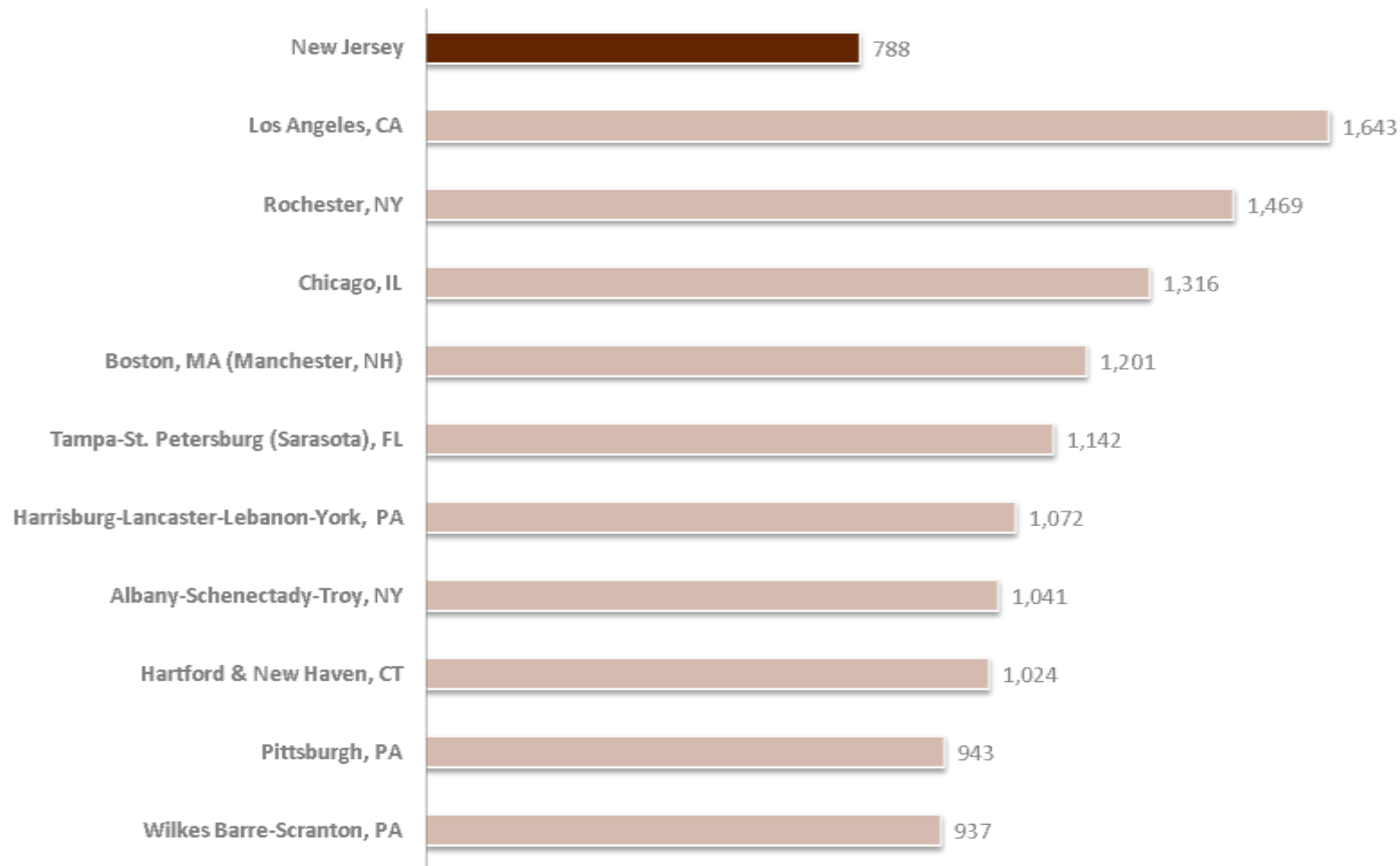


Chart 23 • Segment: 2008-2010 Overnight Leisure Stays (\$) • New Jersey N = 3,030 household count

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

TRIP ORIGIN

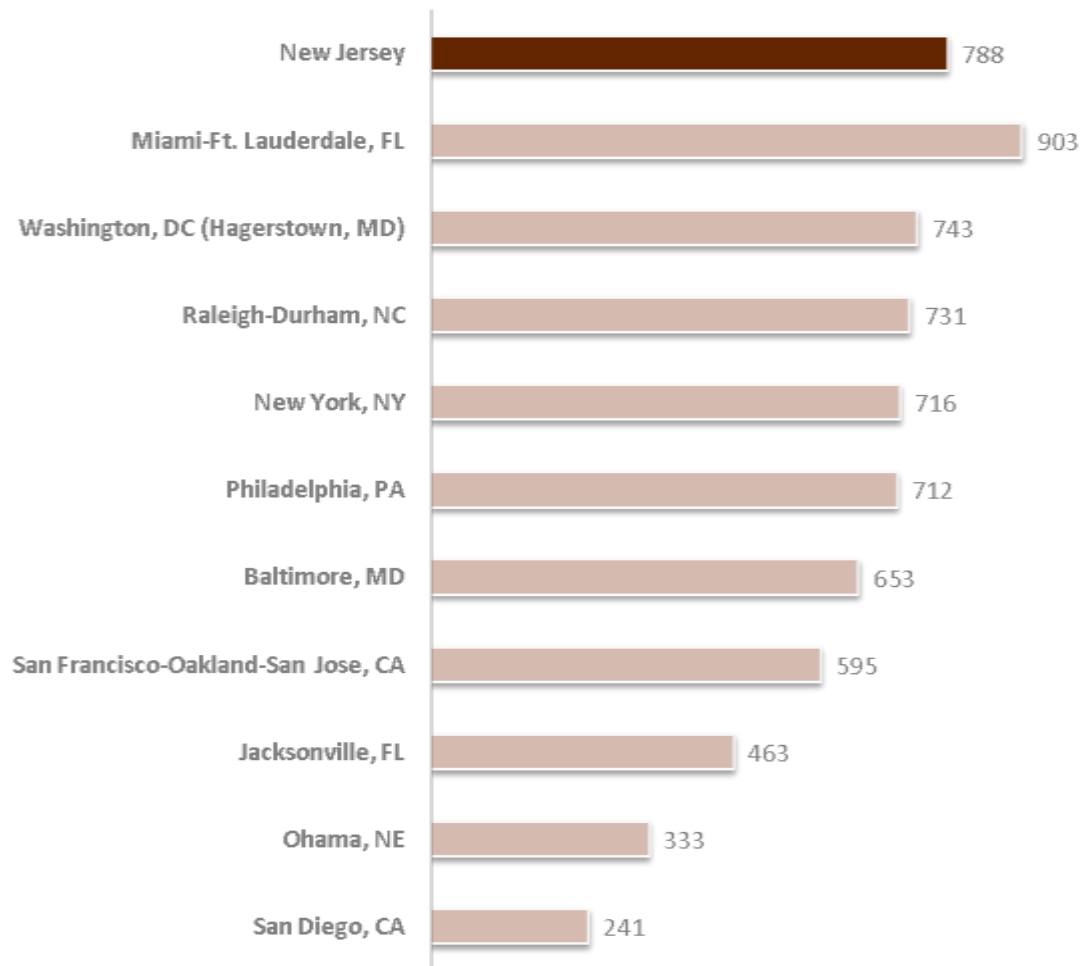


Chart 24 • Segment: 2008-2010 Overnight Leisure Stays (\$) • New Jersey N = 3,030 household count

New Jersey Origin DMA Comparison

TRIP ORIGIN

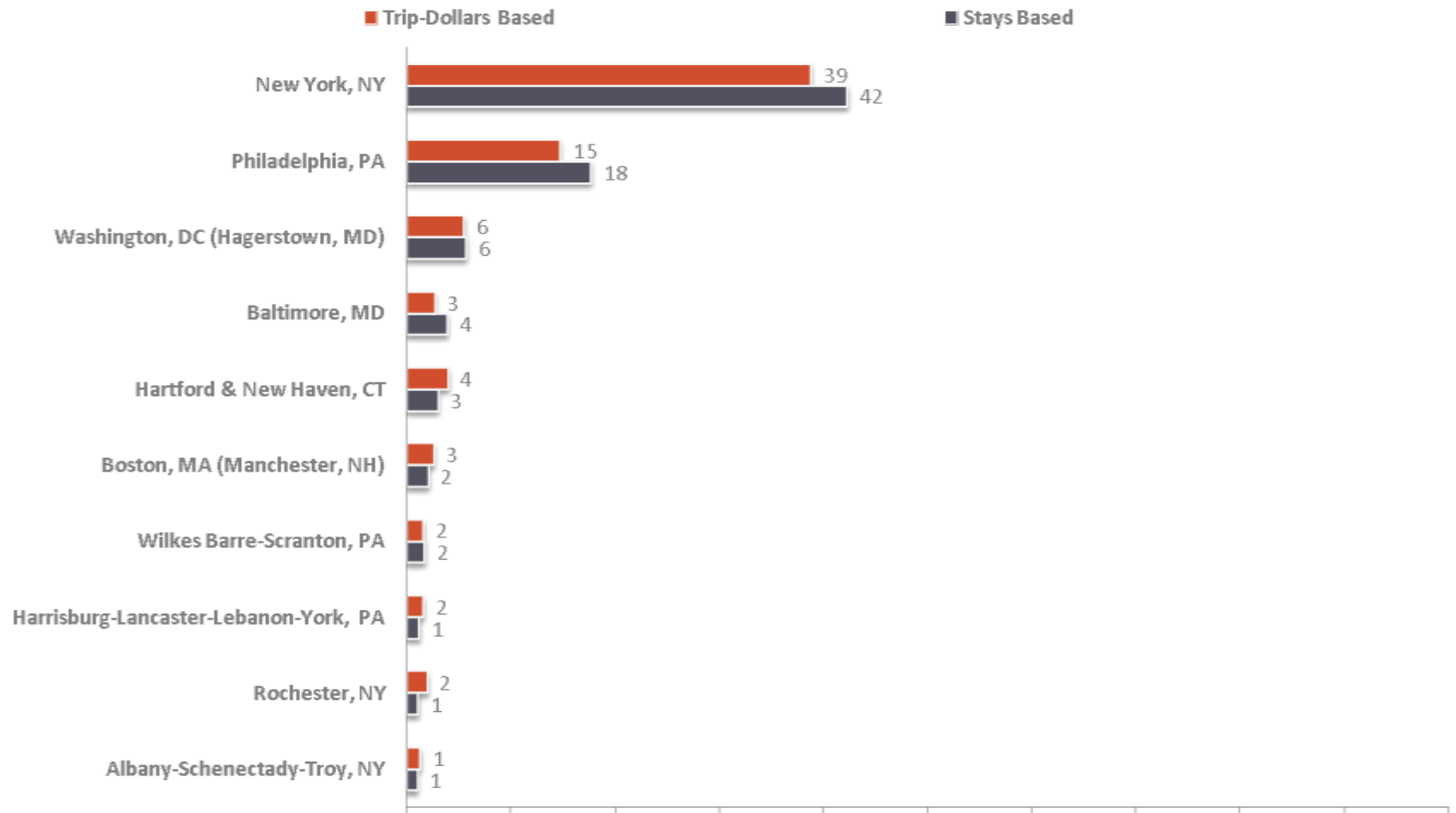


Chart 25 • Segment: 2008-2010 Overnight Leisure (%) • New Jersey N = 4,309 household count

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

TRANSPORTATION

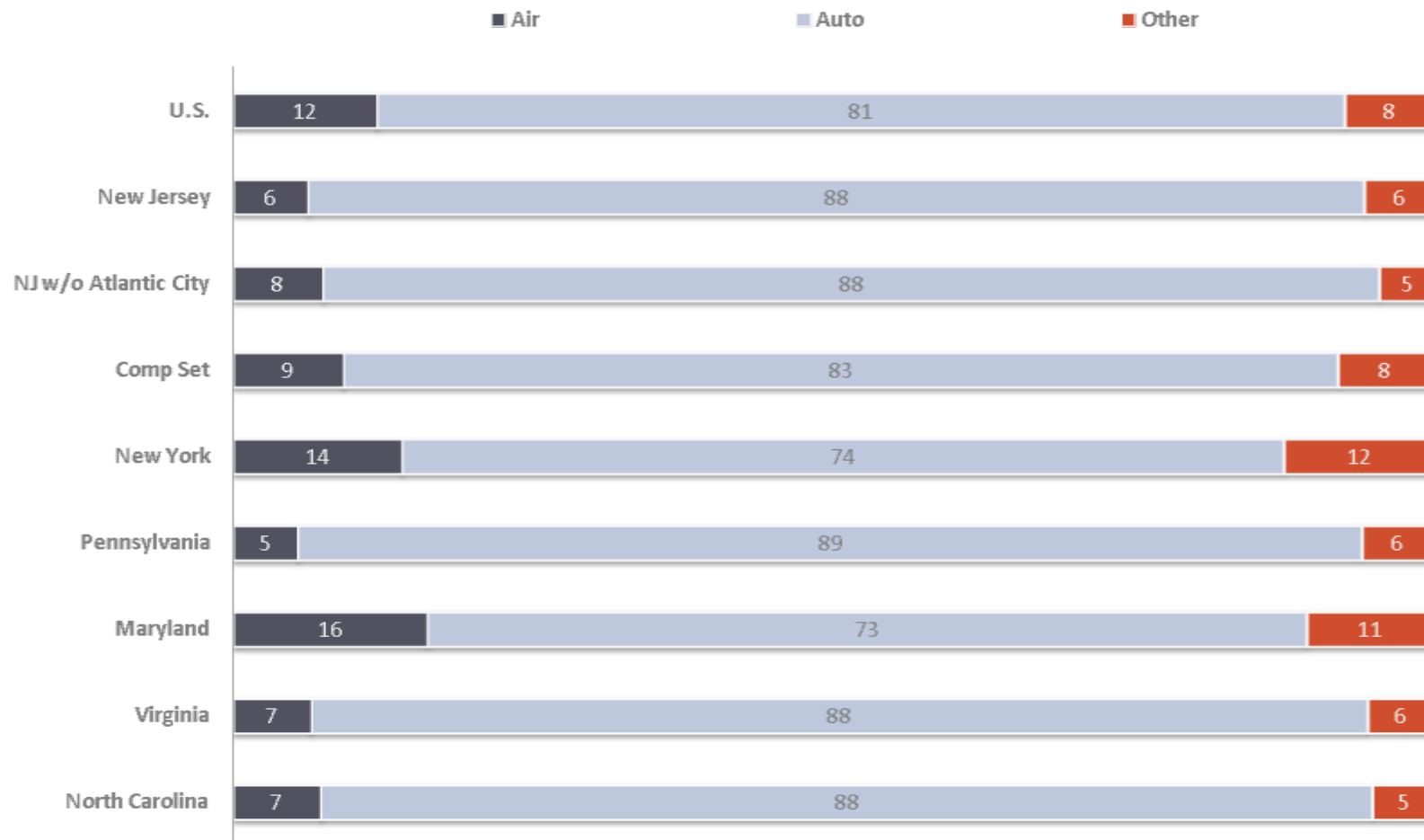


Chart 26 • Segment: 2010 Overnight Leisure Person-Stays (%) • New Jersey N = 867 household count

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

TRANSPORTATION

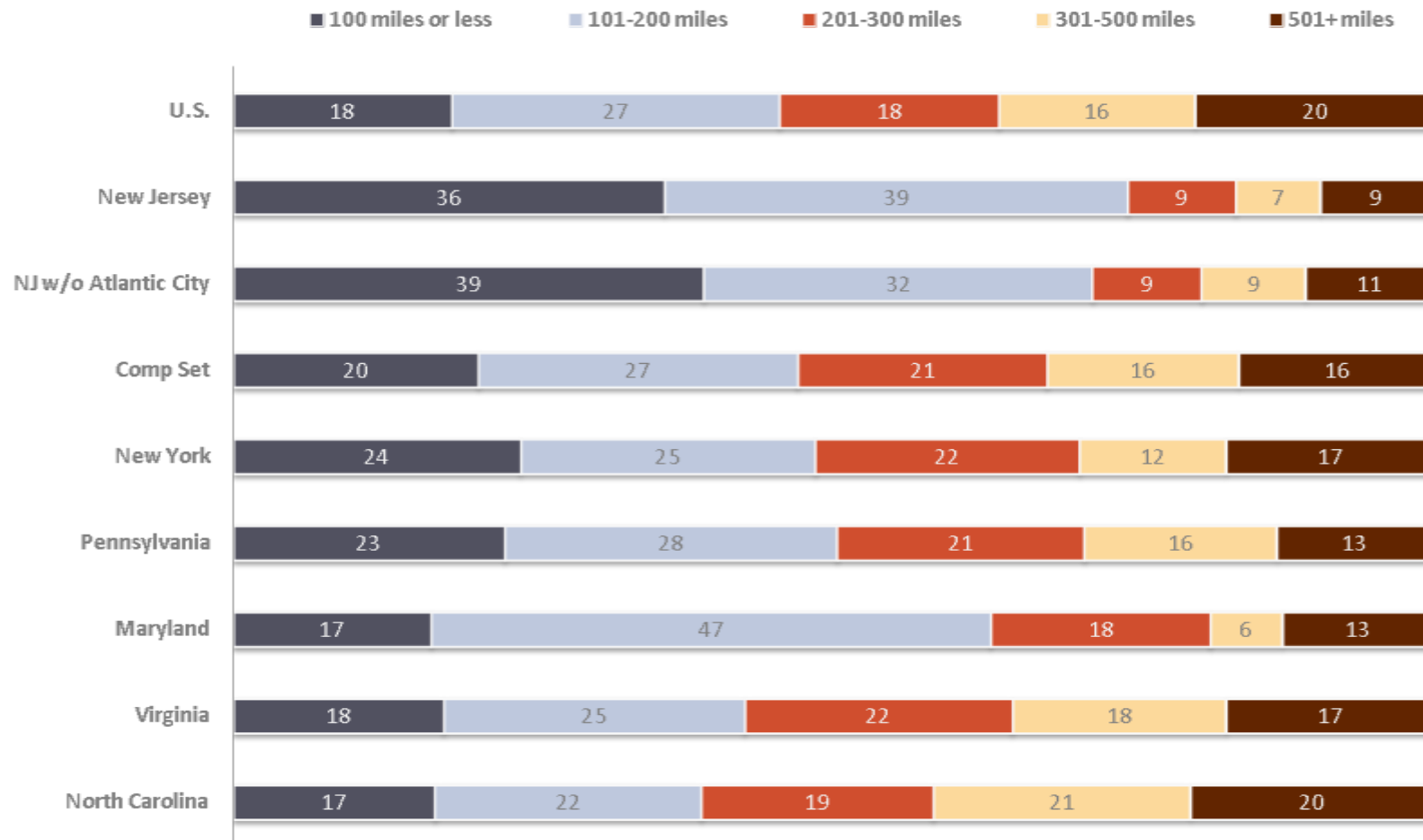


Chart 27 • Segment: 2010 Overnight Leisure Person-Stays (%) • New Jersey N = 717 household count

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

TRANSPORTATION

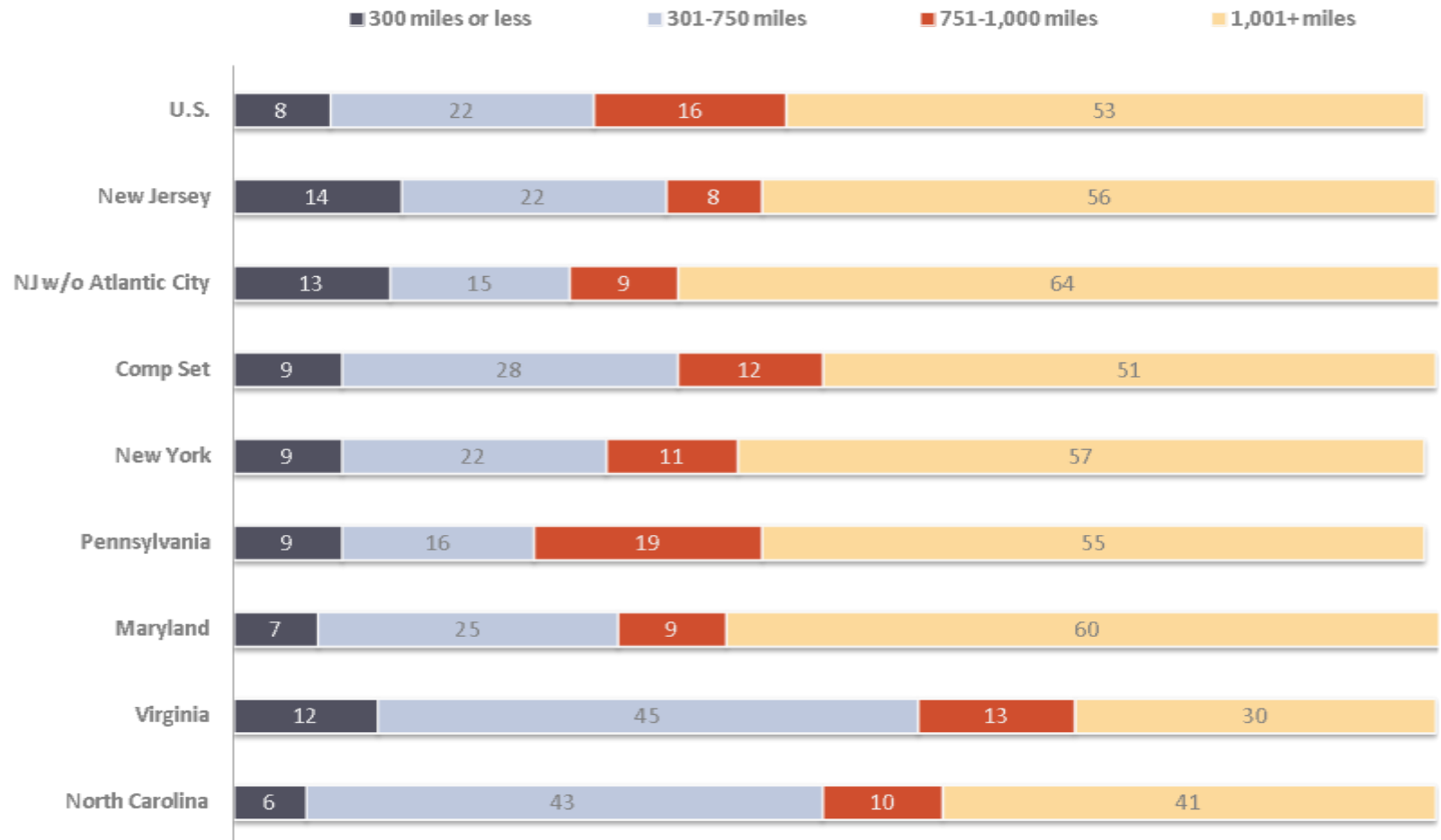


Chart 28 • Segment: 2010 Overnight Leisure Person-Stays (%) • New Jersey N = 87 household count

New Jersey Month Trip Started

TRIP TIMING

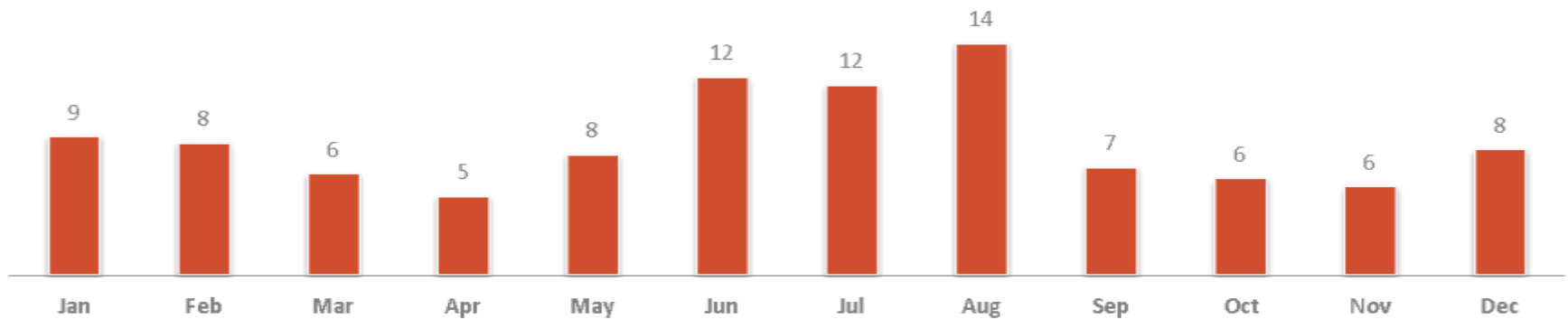


Chart 29 • Segment: 2010 Overnight Leisure Person-Stays (%) • New Jersey N = 880 household count

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

TRIP TIMING

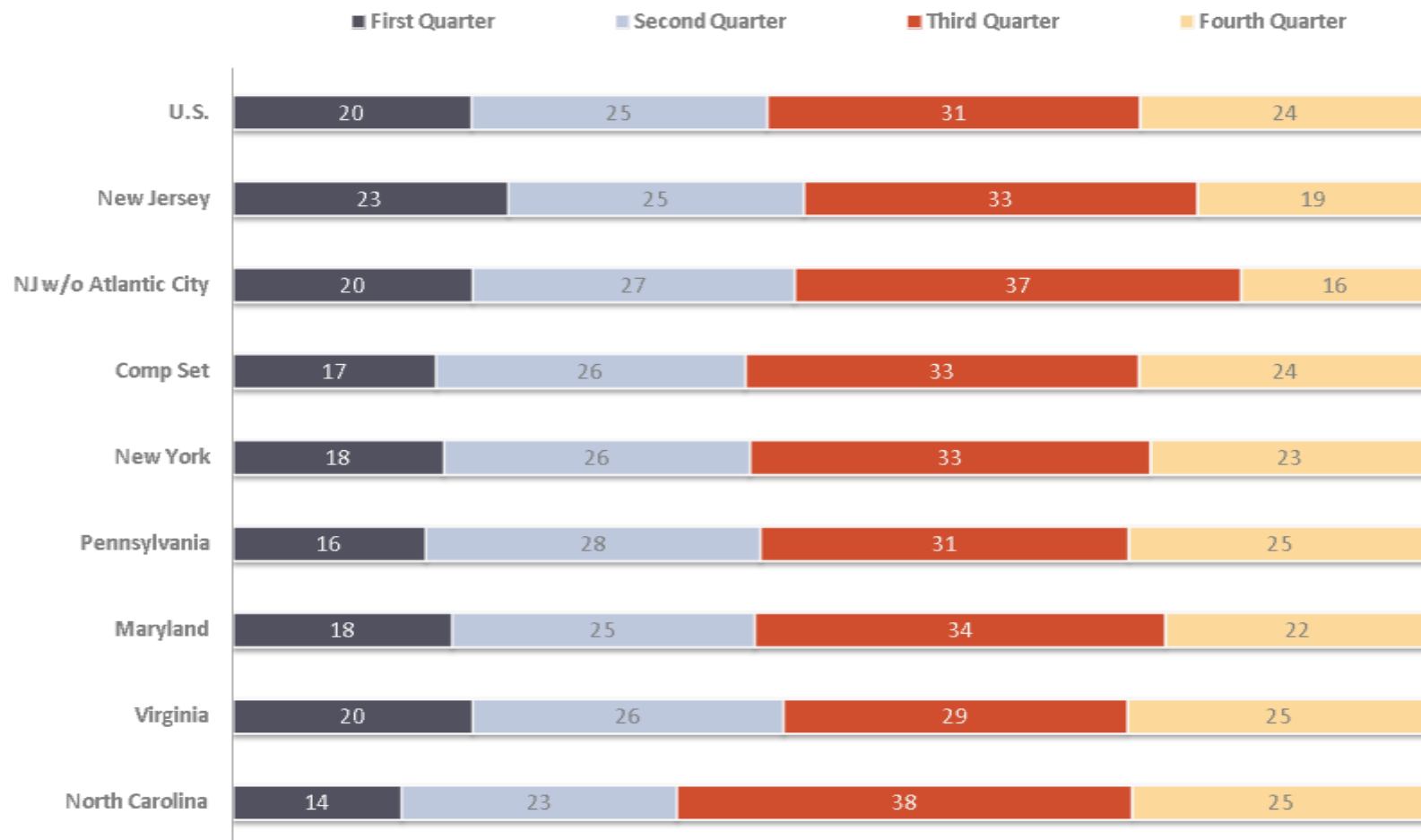


Chart 30 • Segment: 2010 Overnight Leisure Person-Stays (%) • New Jersey N = 880 household count

New Jersey Avg. Party per Trip Spending by Quarter

TRIP TIMING

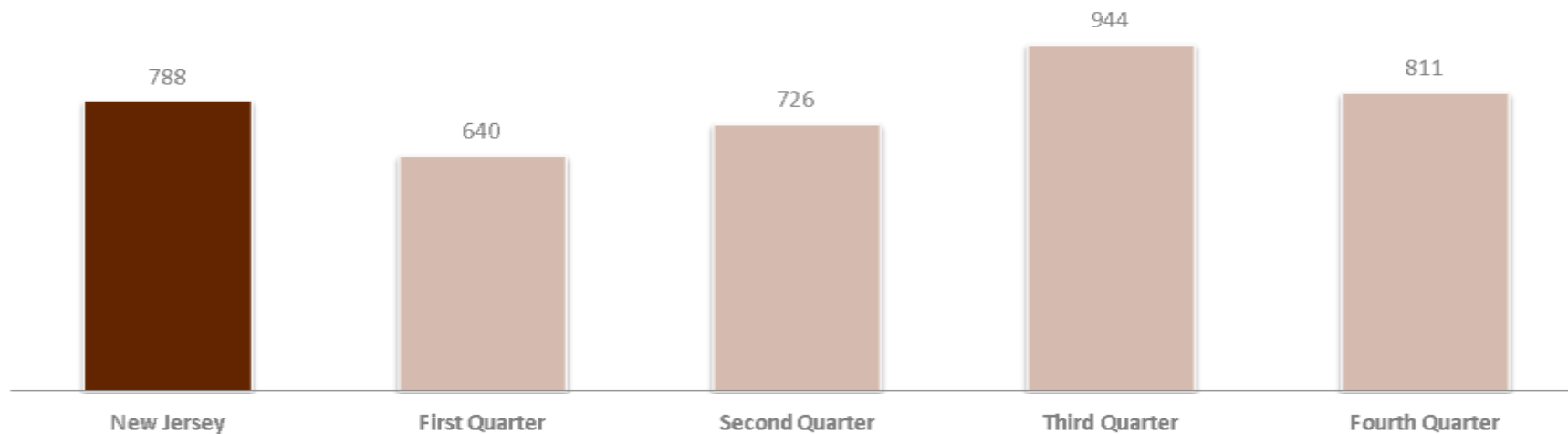


Chart 31 • Segment: 2008-2010 Overnight Leisure Stays (\$) • New Jersey N = 3,038 household count

New Jersey Trip Timing Comparison by Quarter

TRIP TIMING

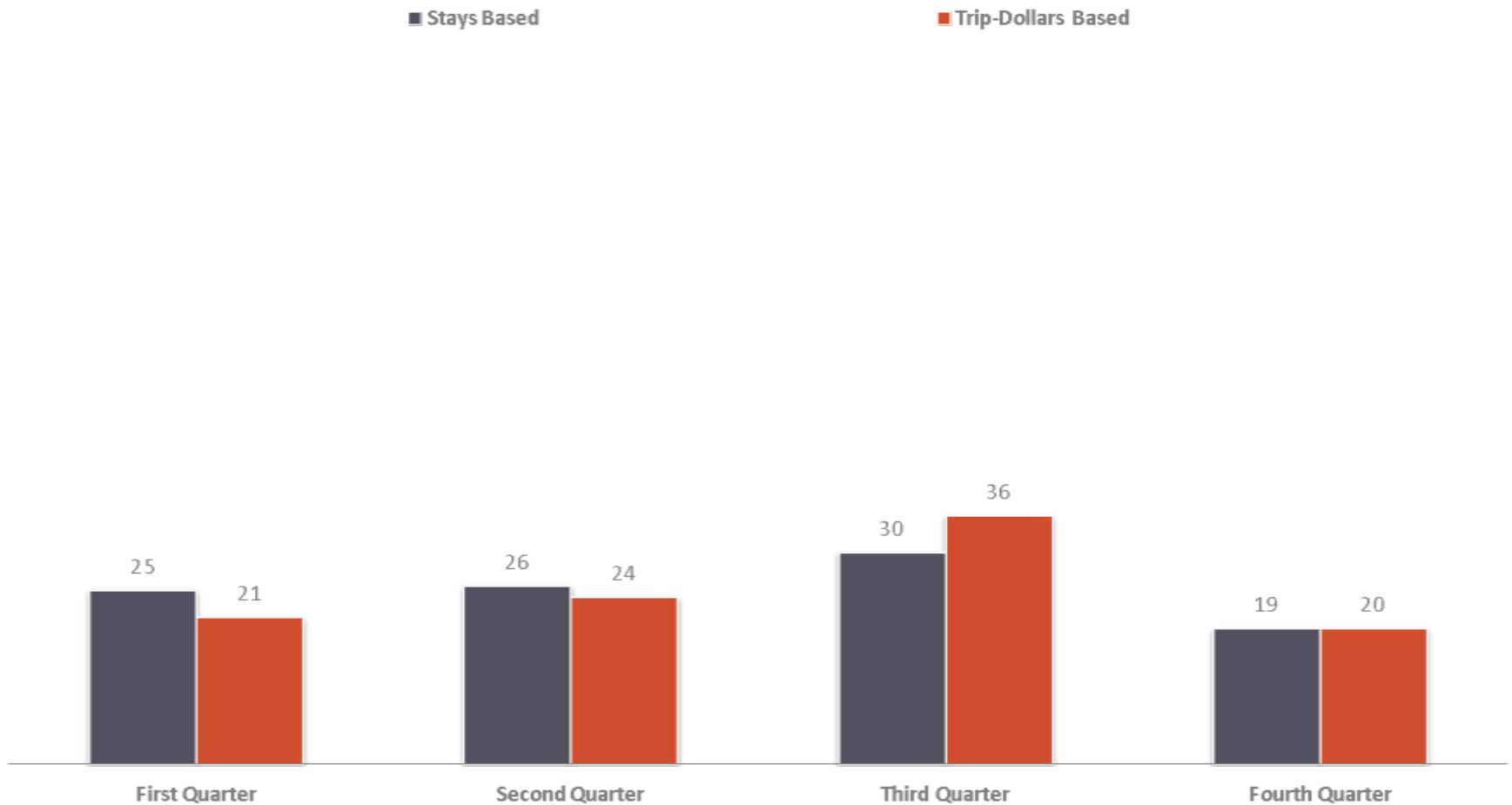


Chart 32 • Segment: 2008-2010 Overnight Leisure (%) • New Jersey N = 4,319 household count

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

TRIP TIMING

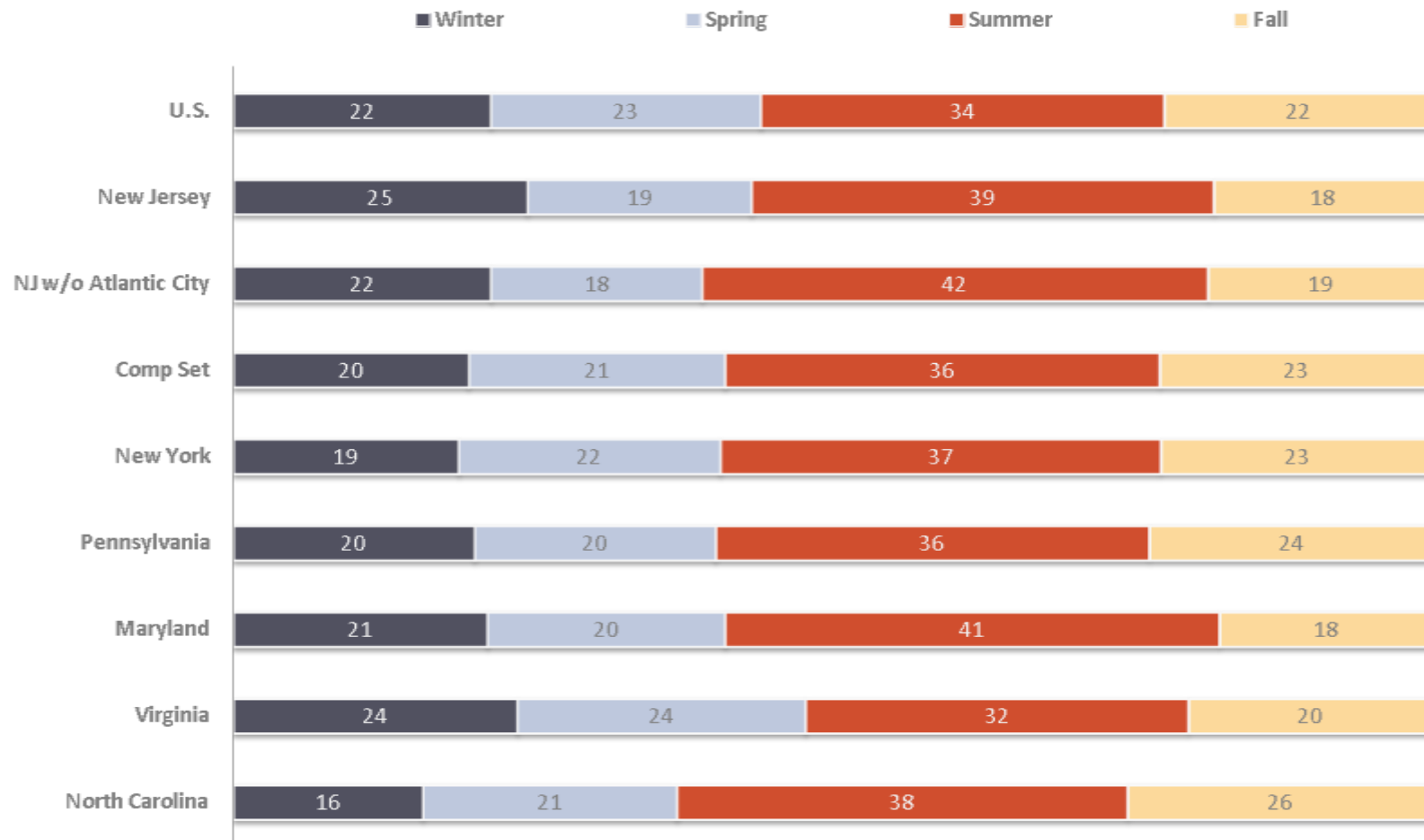


Chart 33 • Segment: 2010 Overnight Leisure Person-Stays (%) • New Jersey N = 880 household count

New Jersey Avg. Party per Trip Spending by Season

TRIP TIMING

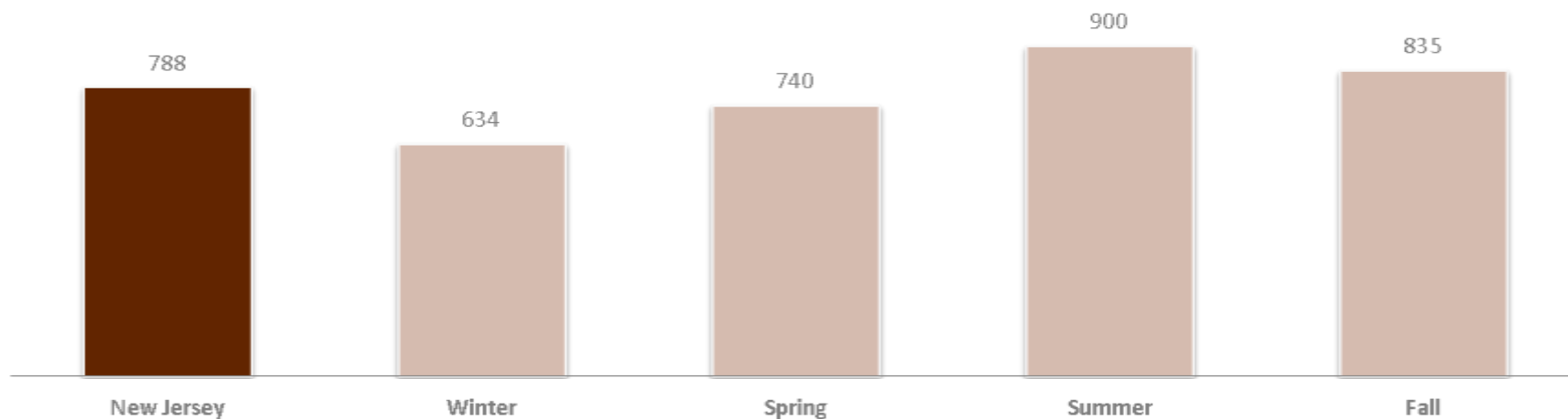


Chart 34 • Segment: 2008-2010 Overnight Leisure Stays (\$) • New Jersey N = 3,038 household count

New Jersey Trip Timing Comparison by Season

TRIP TIMING

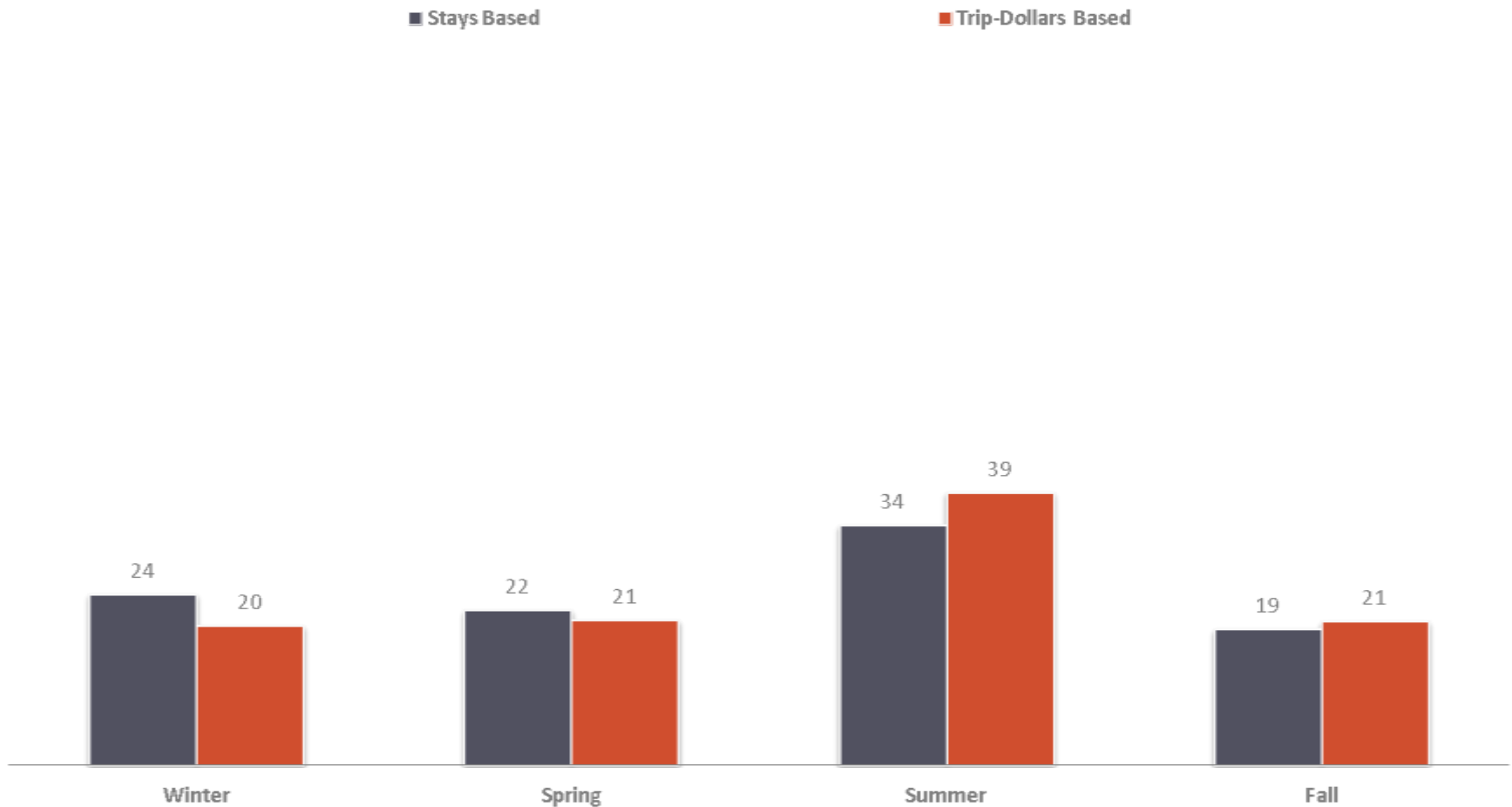


Chart 35 • Segment: 2008-2010 Overnight Leisure (%) • New Jersey N = 4,319 household count

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

TRIP CHARACTERISTICS

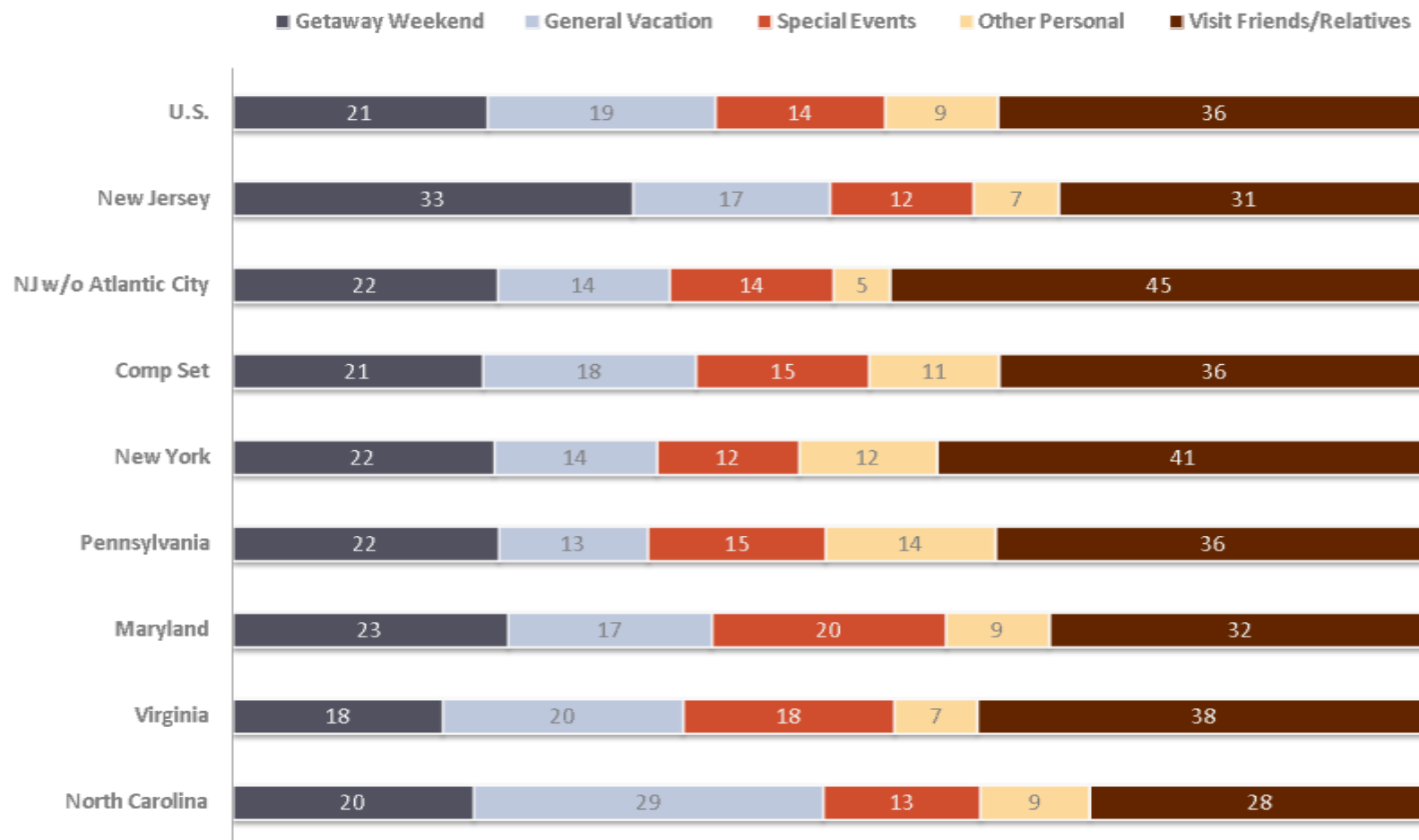


Chart 36 • Segment: 2010 Overnight Leisure Person-Stays (%) • New Jersey N = 880 household count

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

TRIP CHARACTERISTICS



Chart 37 • Segment: 2008-2010 Overnight Leisure Stays (\$) • New Jersey N = 3,038 household count

New Jersey Purpose of Stay Comparison

TRIP CHARACTERISTICS

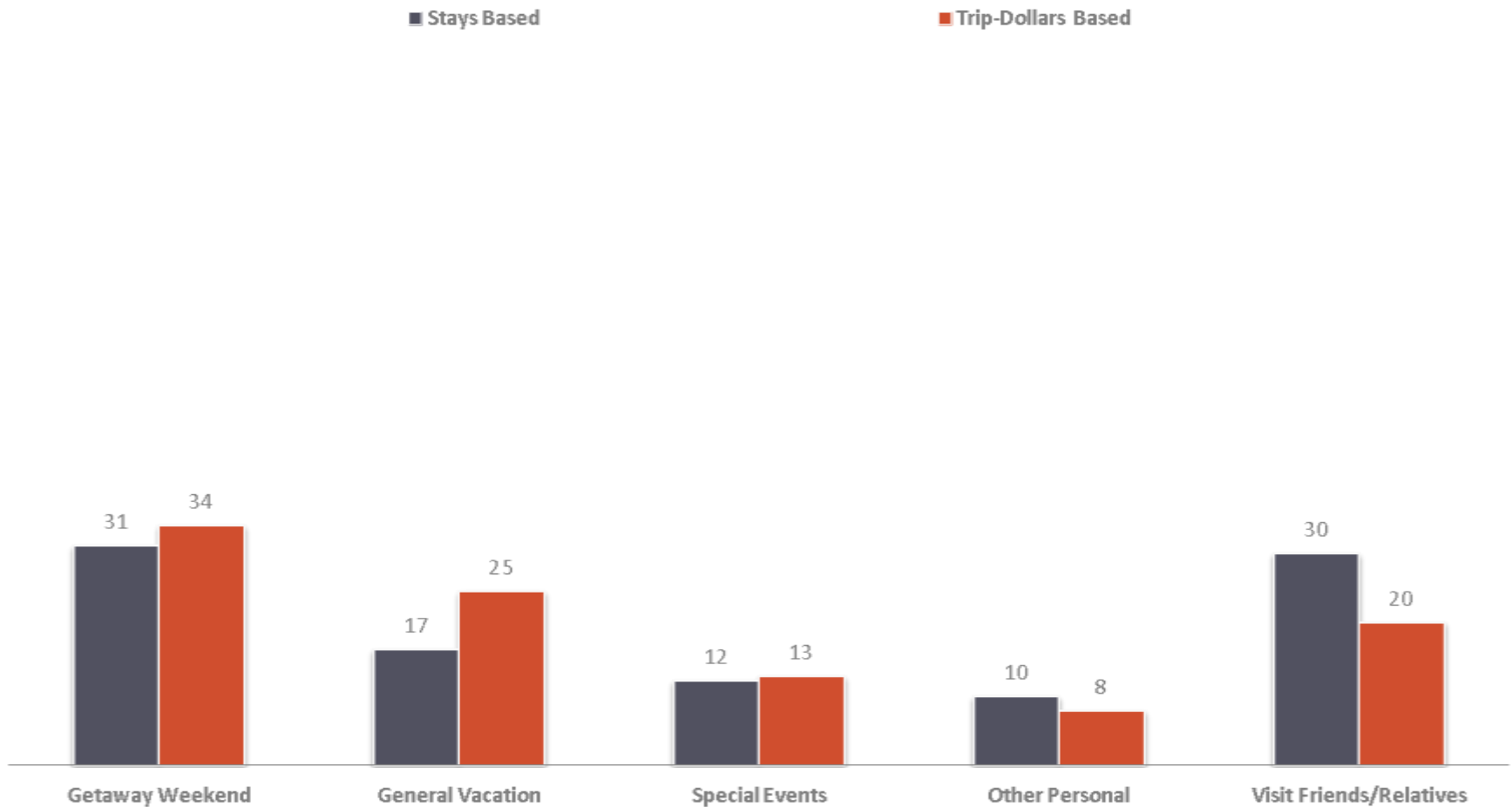


Chart 38 • Segment: 2008-2010 Overnight Leisure (%) • New Jersey N = 4,319 household count

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

TRIP CHARACTERISTICS

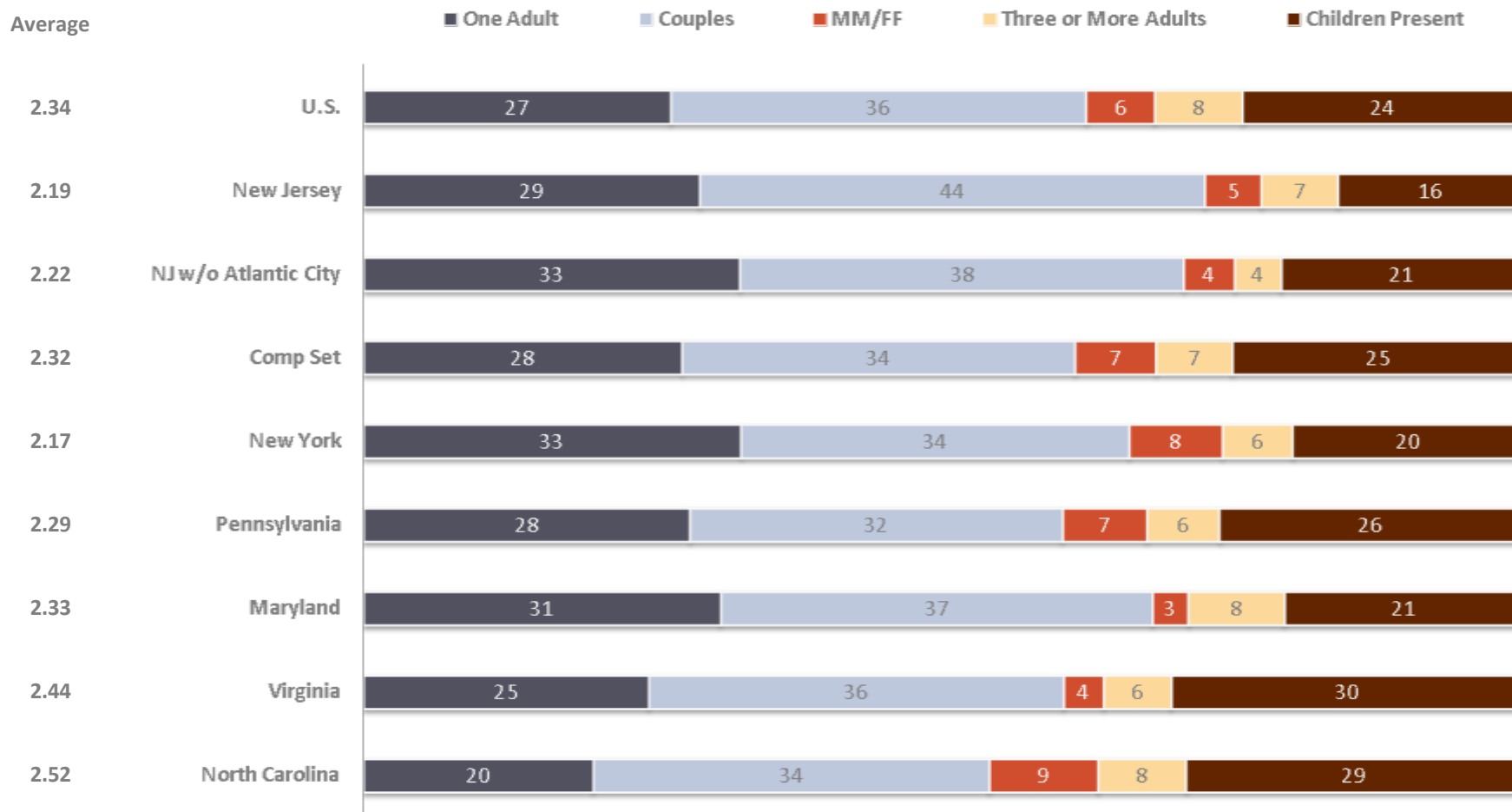


Chart 39 • Segment: 2010 Overnight Leisure Stays (%) • New Jersey N = 705 household count

GLOSSARY

Children Present

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

MM/FF

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

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

TRIP CHARACTERISTICS

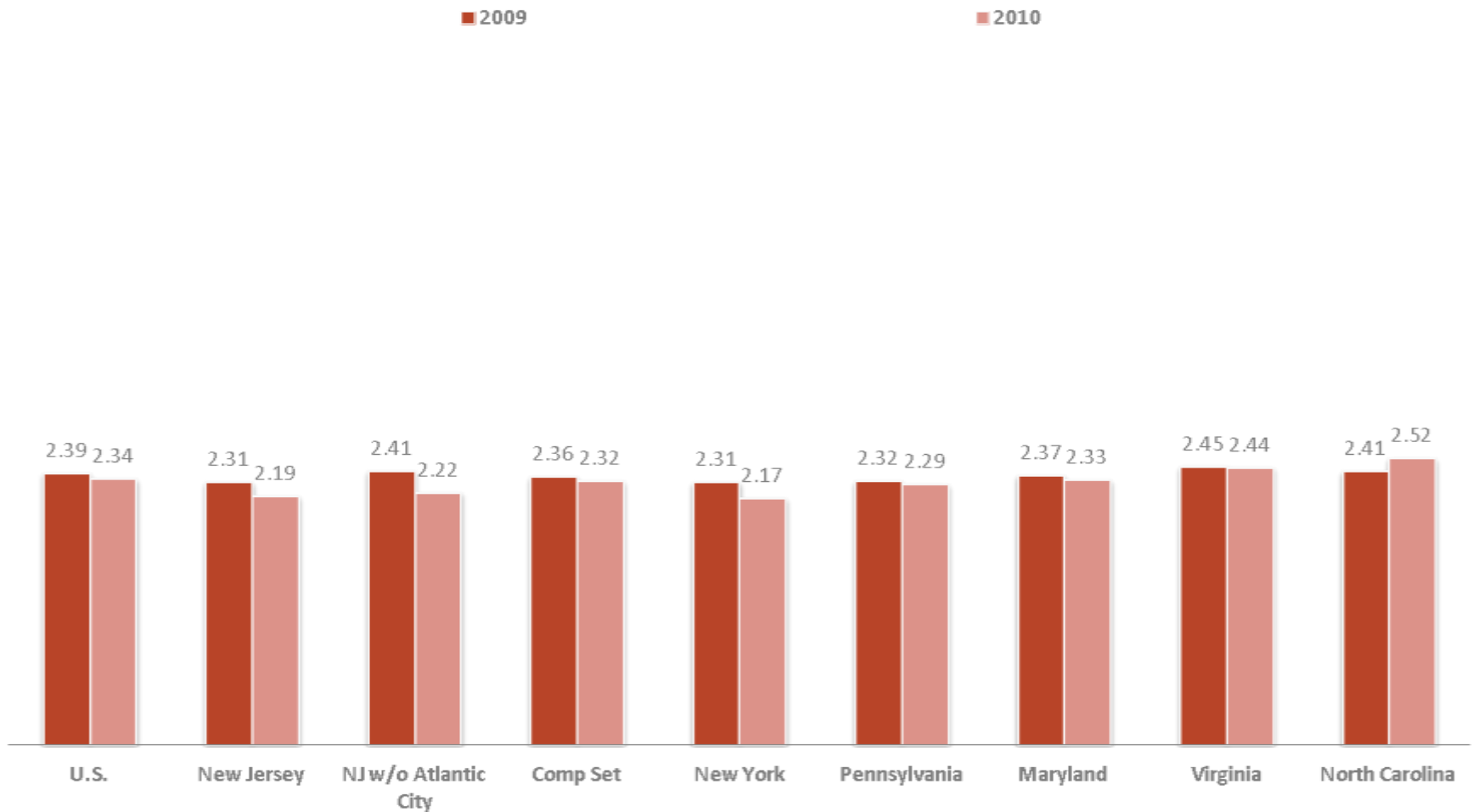


Chart 40 • Segment: 2009/2010 Overnight Leisure Stays • New Jersey N = 705 household count

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

TRIP CHARACTERISTICS

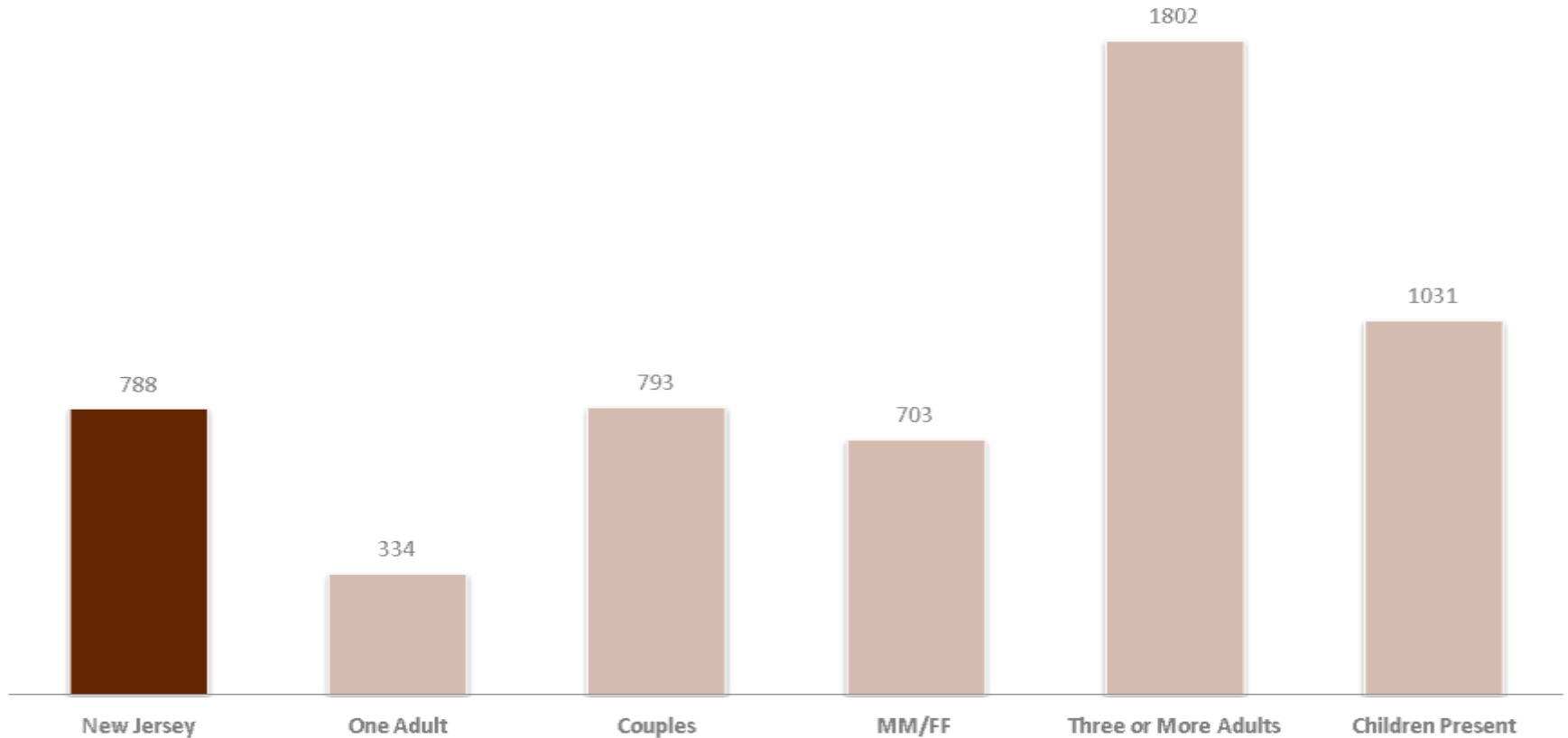


Chart 41 • Segment: 2008-2010 Overnight Leisure Stays (\$) • New Jersey N = 3,038 household count

New Jersey Travel Party Comparison

TRIP CHARACTERISTICS

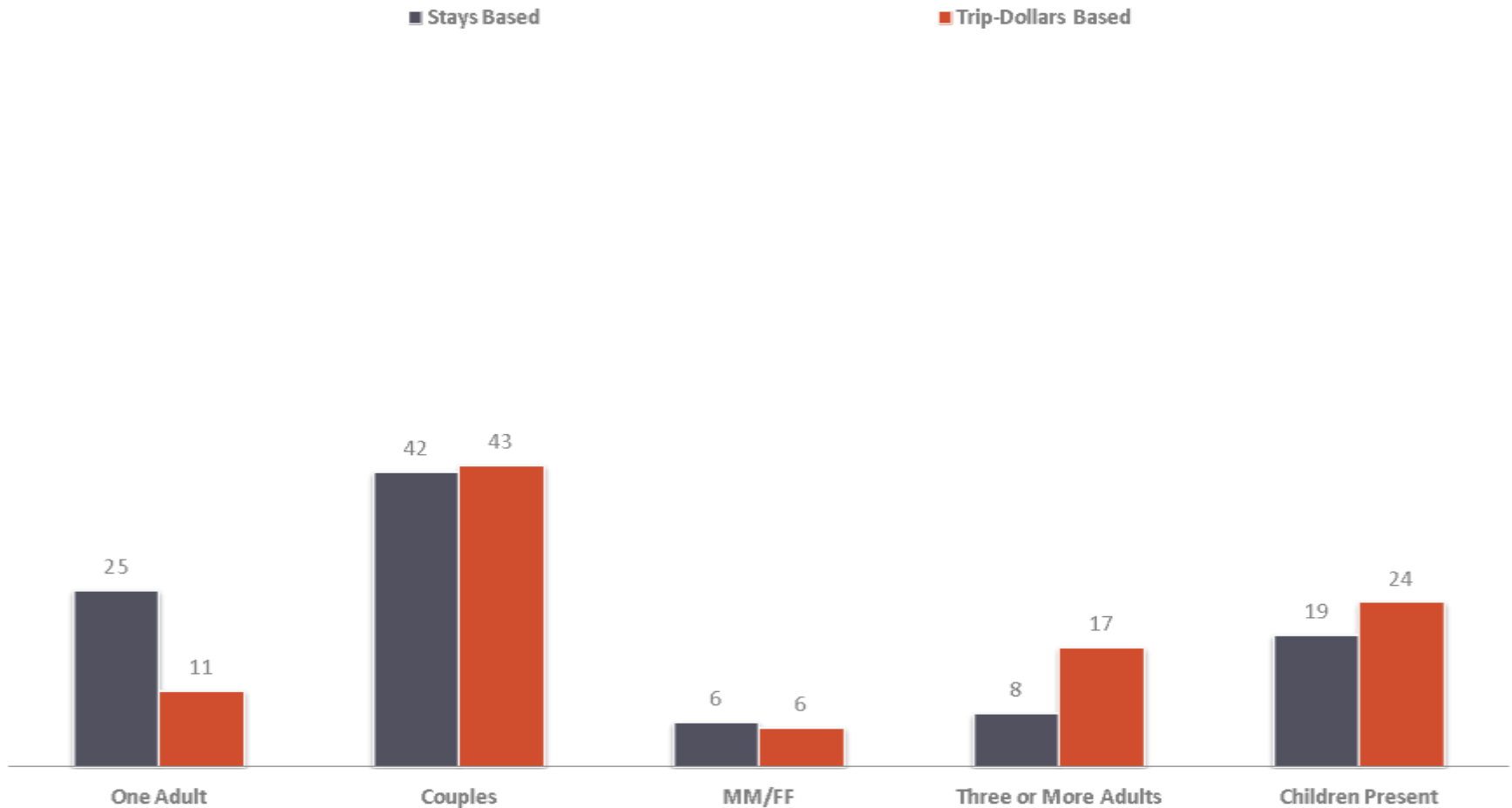


Chart 42 • Segment: 2008-2010 Overnight Leisure (%) • New Jersey N = 3,373 household count

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

TRIP CHARACTERISTICS

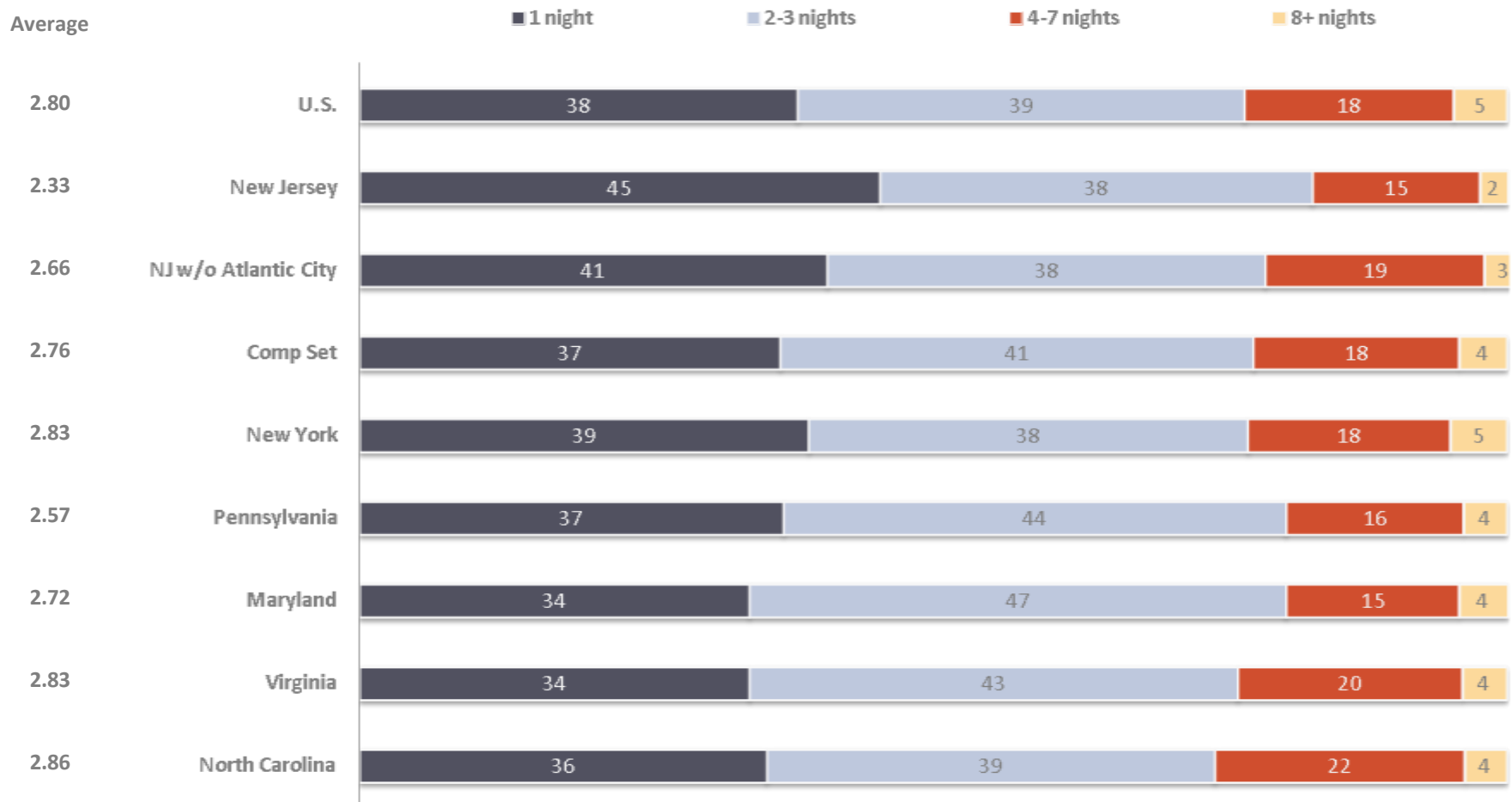


Chart 43 • Segment: 2010 Overnight Leisure Stays (%) • New Jersey N = 880 household count

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

TRIP CHARACTERISTICS

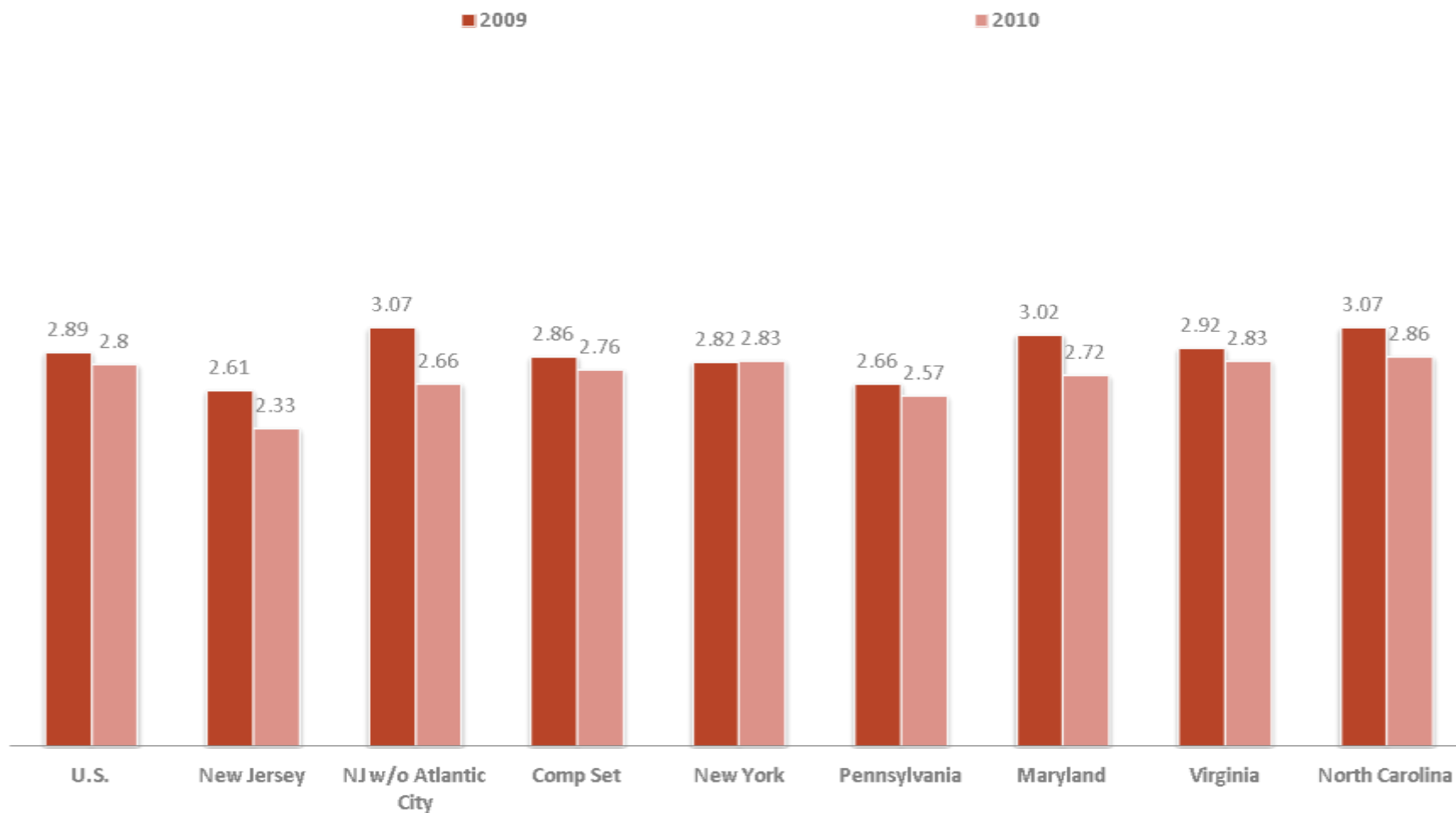


Chart 44 • Segment: 2009/2010 Overnight Leisure Stays • New Jersey N = 880 household count

New Jersey Avg. Party per Trip Spending by Stay Length

TRIP CHARACTERISTICS

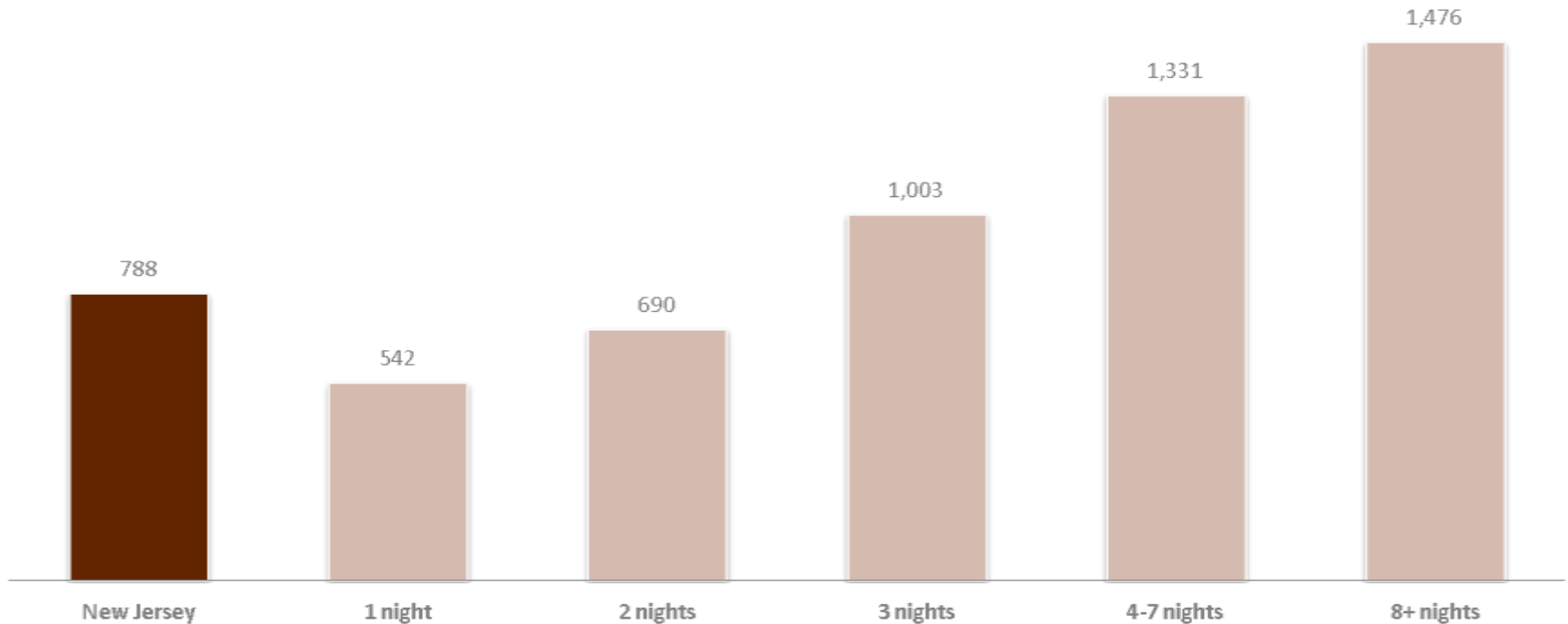


Chart 45 • Segment: 2008-2010 Overnight Leisure Stays (\$) • New Jersey N = 3,038 household count

New Jersey Stay Length Comparison

TRIP CHARACTERISTICS

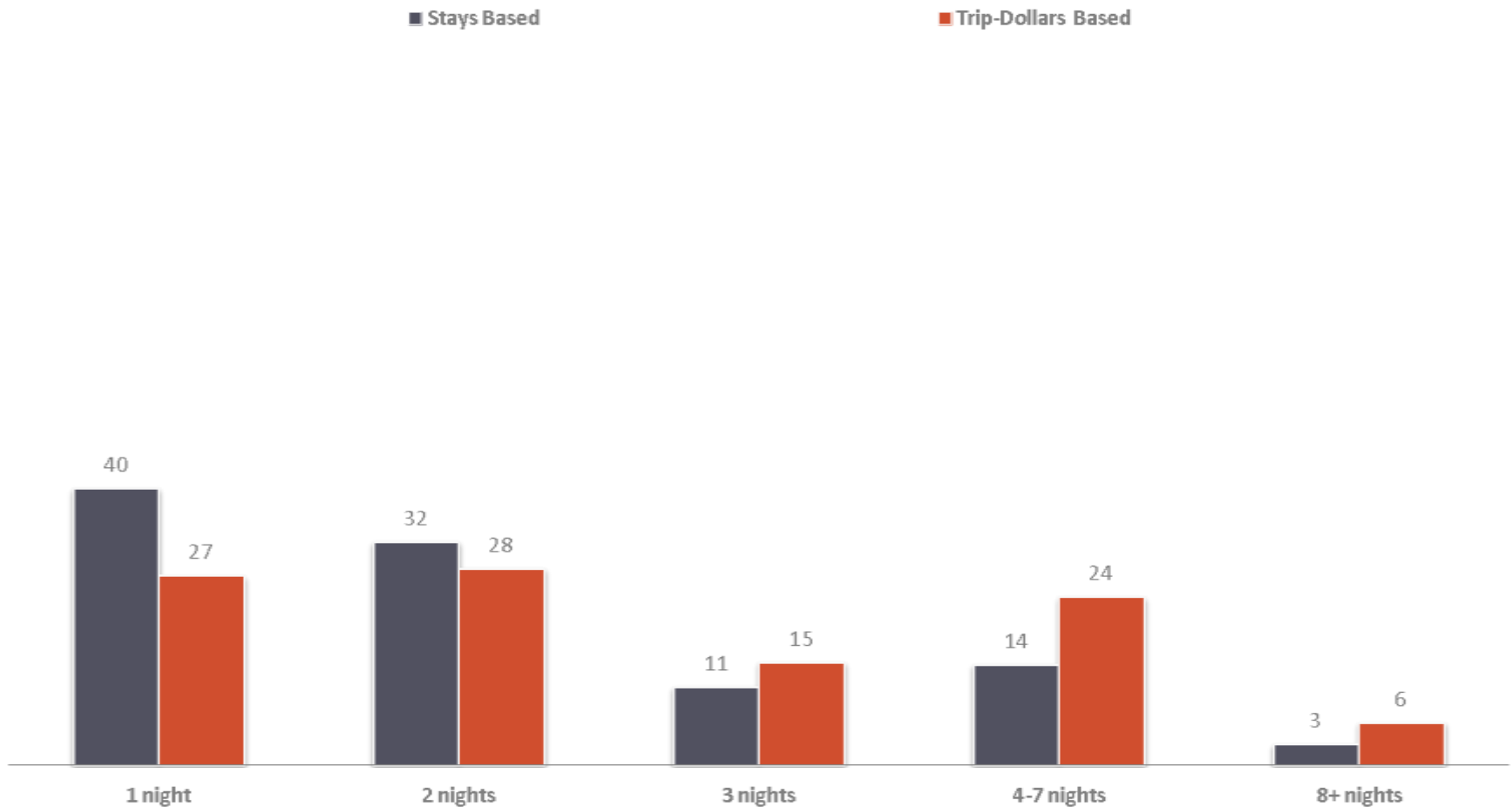


Chart 46 • Segment: 2008-2010 Overnight Leisure (%) • New Jersey N = 4,319 household count

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

TRIP CHARACTERISTICS

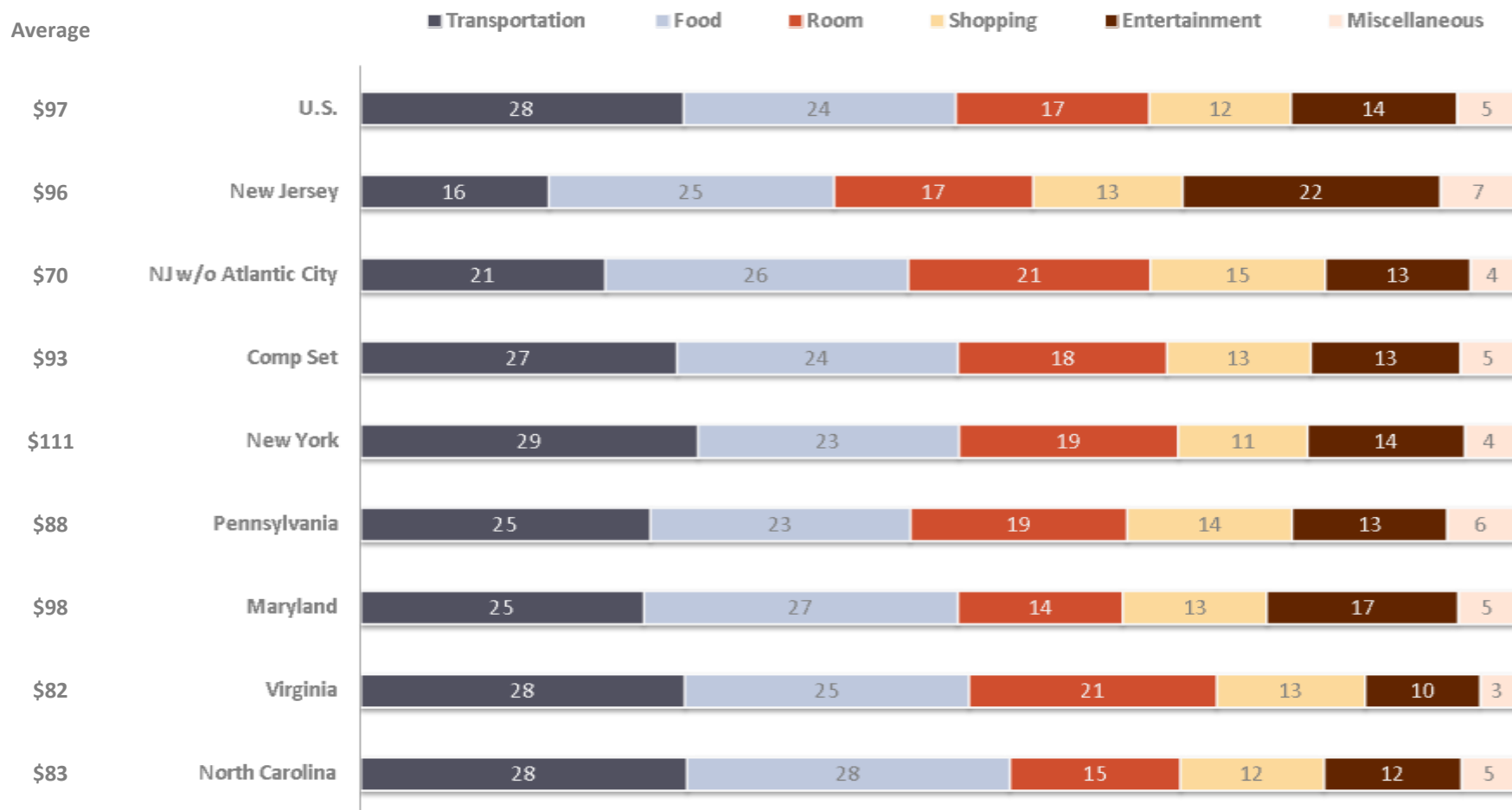


Chart 47 • Segment: 2010 Overnight Leisure Person-Days (%) • New Jersey N = 783 household count

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

TRIP CHARACTERISTICS

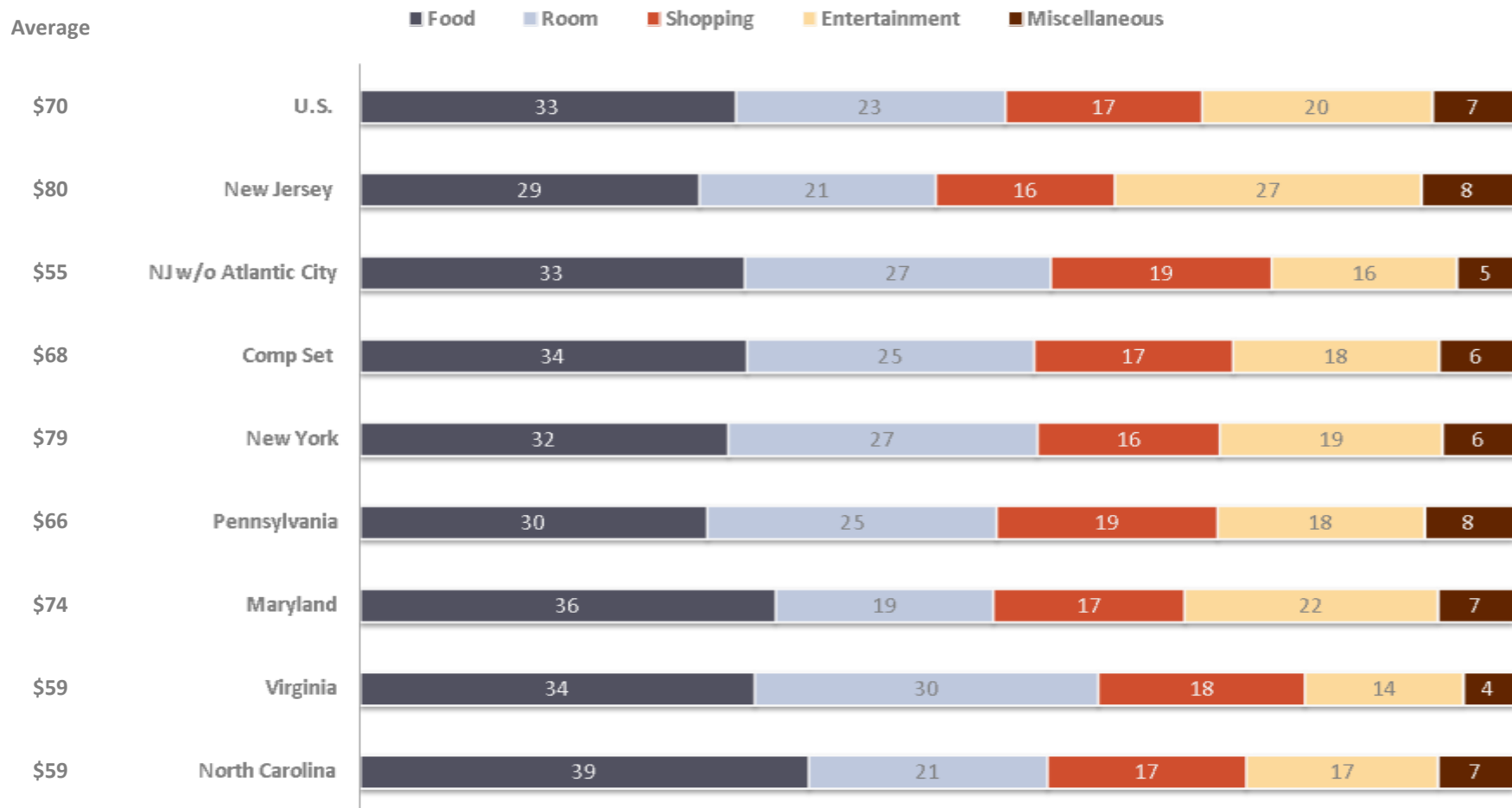


Chart 48 • Segment: 2010 Overnight Leisure Person-Days (%) • New Jersey N = 783 household count

Top Activities at the Destination

ACTIVITY PARTICIPATION

	U.S.	New Jersey	NJ w/o Atl City	Comp Set	New York	Pennsylvania	Maryland	Virginia	North Carolina
Dining	31%	32%	22%	31%	34%	26%	37%	28%	32%
Entertainment	25%	31%	19%	24%	25%	28%	29%	18%	21%
Beach, Waterfront	10%	26%	33%	10%	6%	1%	19%	13%	22%
Gamble	6%	24%	3%	3%	4%	3%	1%	0%	3%
Shopping	22%	22%	21%	23%	24%	24%	18%	21%	24%
Night Life	8%	16%	8%	7%	8%	6%	14%	4%	6%
Sightseeing	16%	11%	14%	17%	20%	13%	11%	17%	18%
Concert, Play, Dance	4%	5%	6%	5%	6%	5%	6%	3%	5%
Watch Sports	5%	4%	4%	4%	4%	5%	4%	5%	4%
Festival, Craft Fair	4%	4%	5%	4%	4%	6%	3%	3%	3%
Hike, Bike	5%	3%	5%	5%	3%	5%	4%	4%	7%
Visit Historic Site	6%	3%	5%	9%	8%	7%	9%	10%	10%

Chart 49 • Segment: 2010 Overnight Leisure Stays (%) • New Jersey N = 880 household count

GLOSSARY

Entertainment These activities are based on minimum spending levels : Entertainment (>\$10), Dining (>\$20), Shopping (>\$20). All other activity incidence is based on activities selected from a list.

Dining 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.

Shopping

Top Activities at the Destination

ACTIVITY PARTICIPATION

	U.S.	New Jersey	NJ w/o Atl. City	Comp Set	New York	Pennsylvania	Maryland	Virginia	North Carolina
Theme/Amusement Park	6%	3%	4%	5%	2%	10%	3%	6%	1%
Group Tour	3%	2%	0%	3%	3%	3%	5%	2%	1%
National or State Parks	8%	2%	3%	7%	6%	6%	7%	8%	10%
Hunt, Fish	4%	2%	3%	4%	5%	2%	2%	4%	4%
Museum, Art Exhibit	5%	2%	1%	7%	9%	7%	6%	8%	6%
Camping	5%	1%	2%	5%	6%	4%	6%	5%	2%
Shows (auto, boat, antique, etc.)	1%	1%	1%	1%	2%	1%	2%	0%	1%
Golf	2%	1%	1%	1%	1%	1%	2%	1%	1%
Nature, Eco-Travel	3%	1%	1%	2%	2%	2%	2%	2%	3%
Boat, Sail	2%	0%	1%	3%	3%	1%	8%	4%	1%
Snow Ski	1%	0%	1%	1%	1%	2%	0%	0%	0%
Other Adventure Sports	2%	0%	1%	3%	1%	2%	4%	3%	4%
Look at Real Estate	1%	0%	0%	0%	1%	1%	2%	1%	1%

Chart 50 • Segment: 2010 Overnight Leisure Stays (%) • New Jersey N = 880 household count

New Jersey Activity Index

ACTIVITY PARTICIPATION

The activity index uses the U.S. to determine the average of 100 and anything above is an activity that travelers in New Jersey are more likely to do than visitors to the U.S. The Index is different from the share of participation in that it only reflects a traveler's propensity to participate in an activity, relative to the propensity for average U.S. destinations.

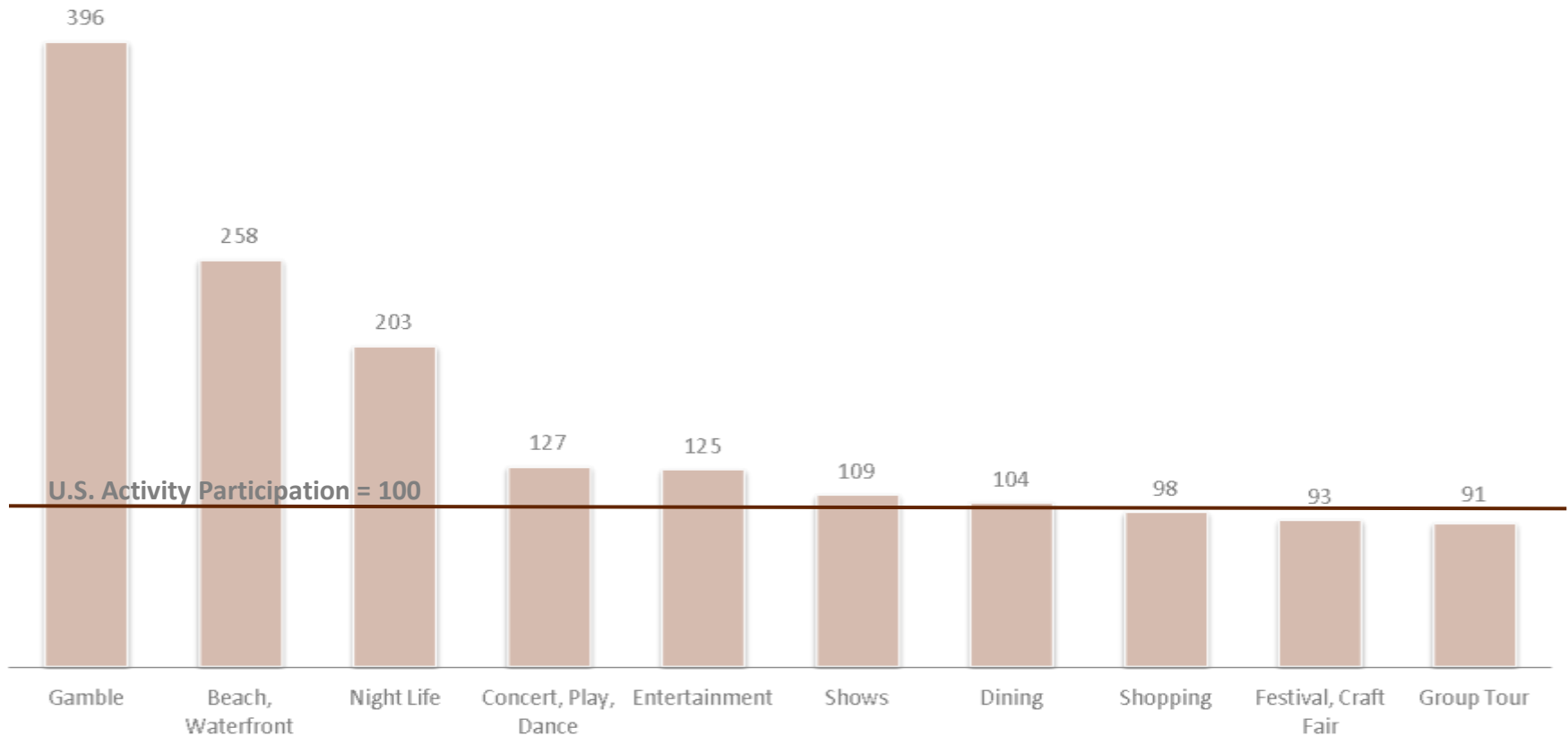


Chart 51 • Segment: 2010 Overnight Leisure Stays • New Jersey N = 880 household count

New Jersey Avg. Party per Trip Spending by Activities

ACTIVITY PARTICIPATION

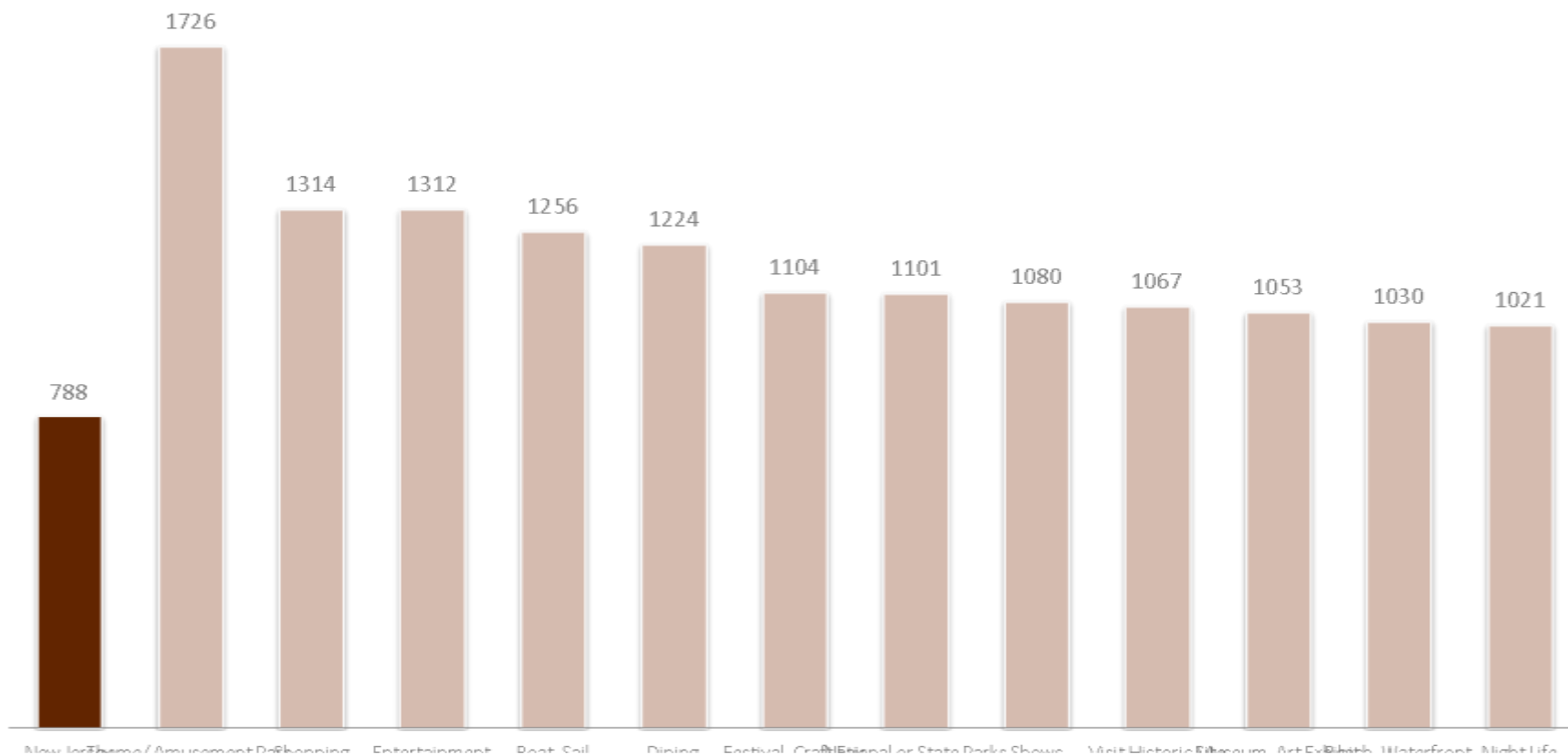


Chart 52 • Segment: 2008-2010 Person-Stays Stays (\$) • New Jersey N = 3,038 household count

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

ACTIVITY PARTICIPATION

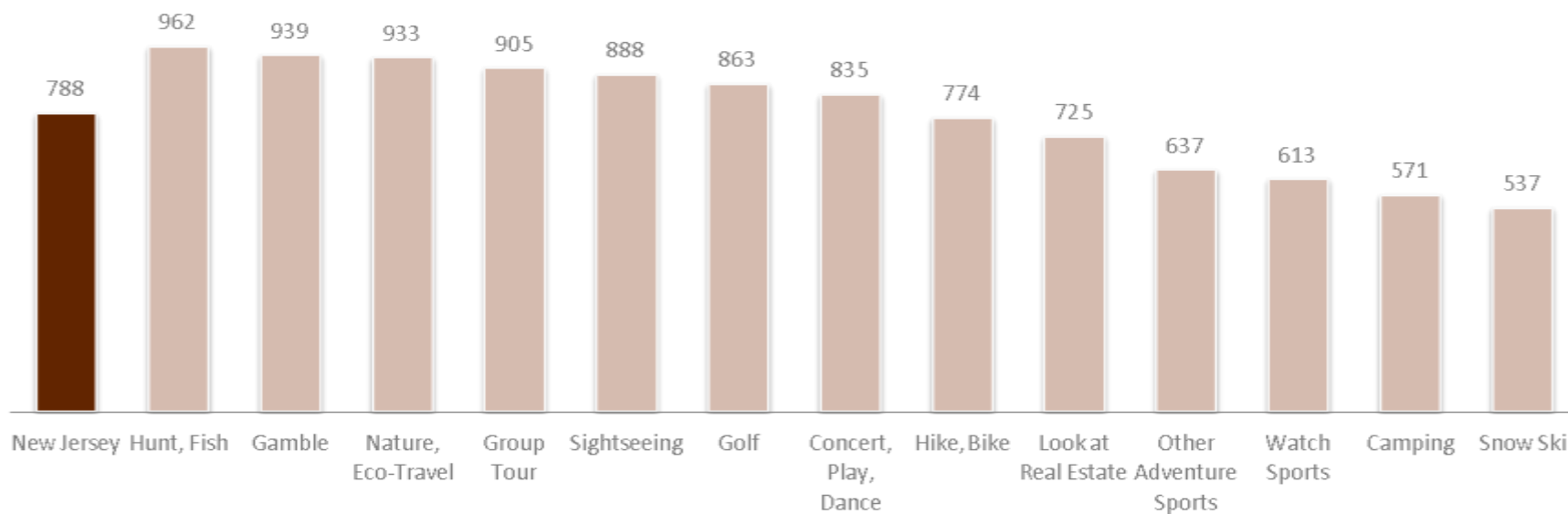


Chart 53 • Segment: 2008-2010 Overnight Leisure Stays (\$) • New Jersey N = 3,038 household count

New Jersey Activity Comparison

ACTIVITY PARTICIPATION

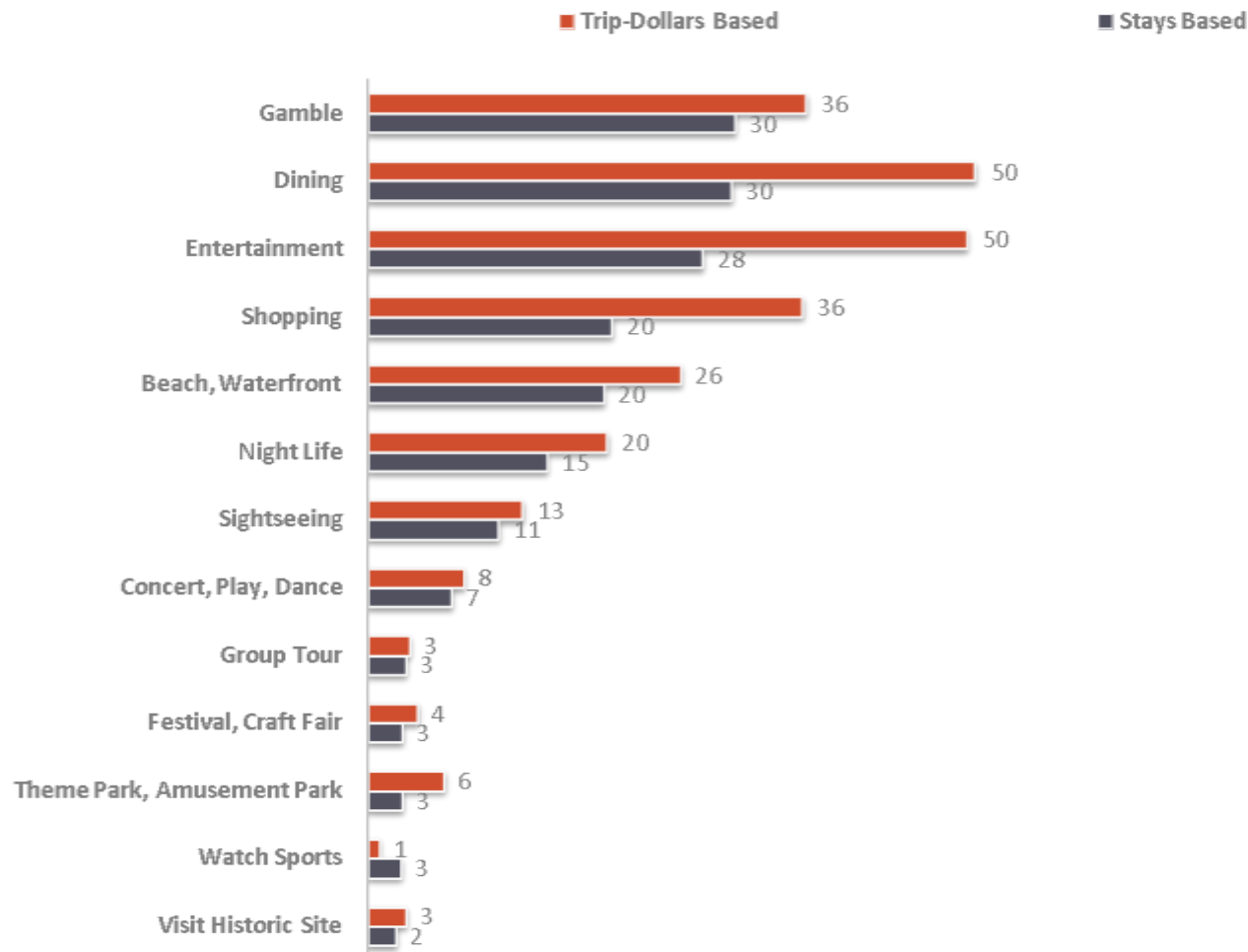


Chart 54 • Segment: 2008-2010 Overnight Leisure (%) • New Jersey N = 4,319 household count

New Jersey Activity Comparison

ACTIVITY PARTICIPATION



Chart 55 • Segment: 2008-2010 Overnight Leisure (%) • New Jersey N = 4,319 household count

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

ACCOMMODATION

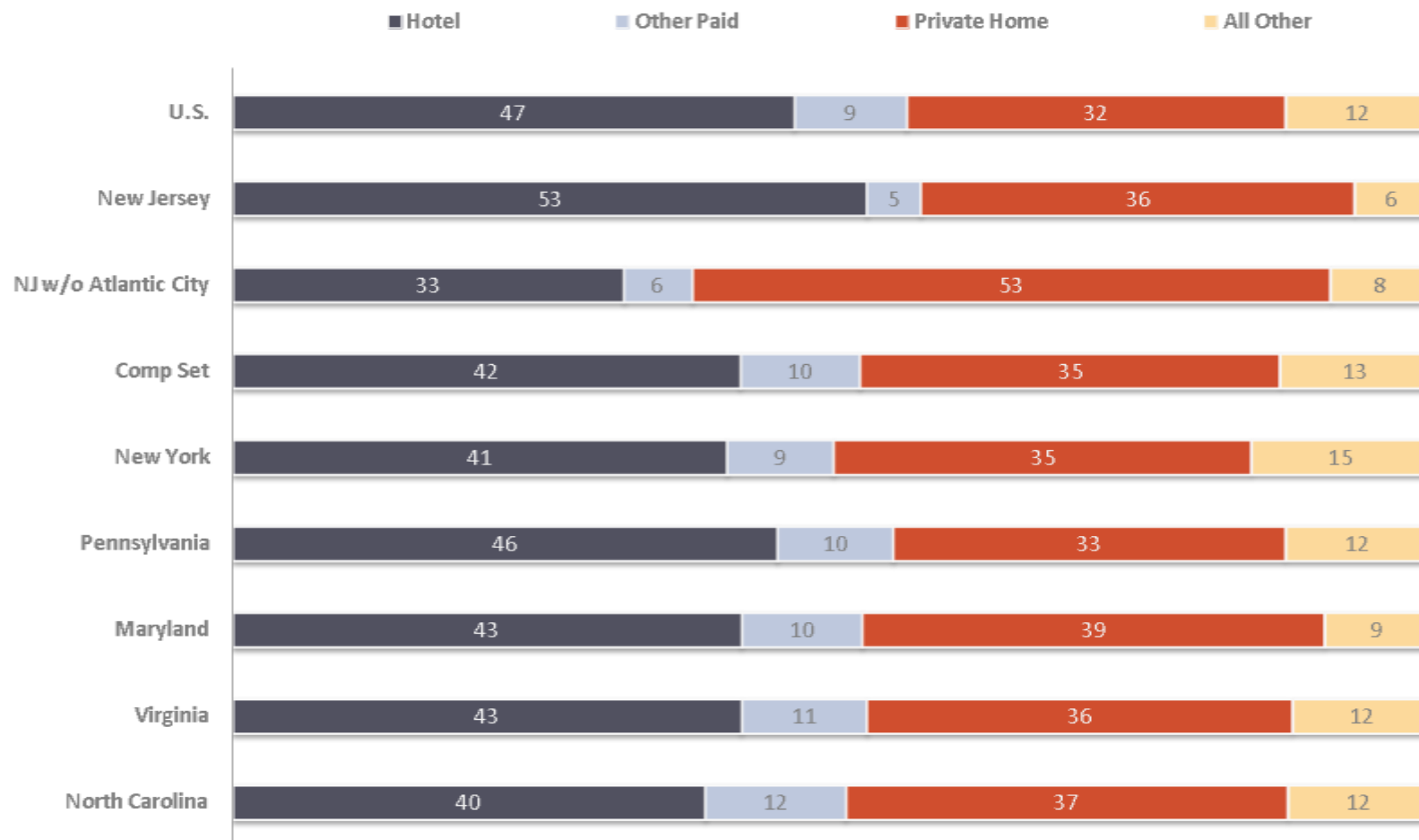


Chart 56 • Segment: 2010 Overnight Leisure Person-Stays (%) • New Jersey N = 880 household count

New Jersey Avg. Party per Trip Spending by Accommodation Type

ACCOMMODATION

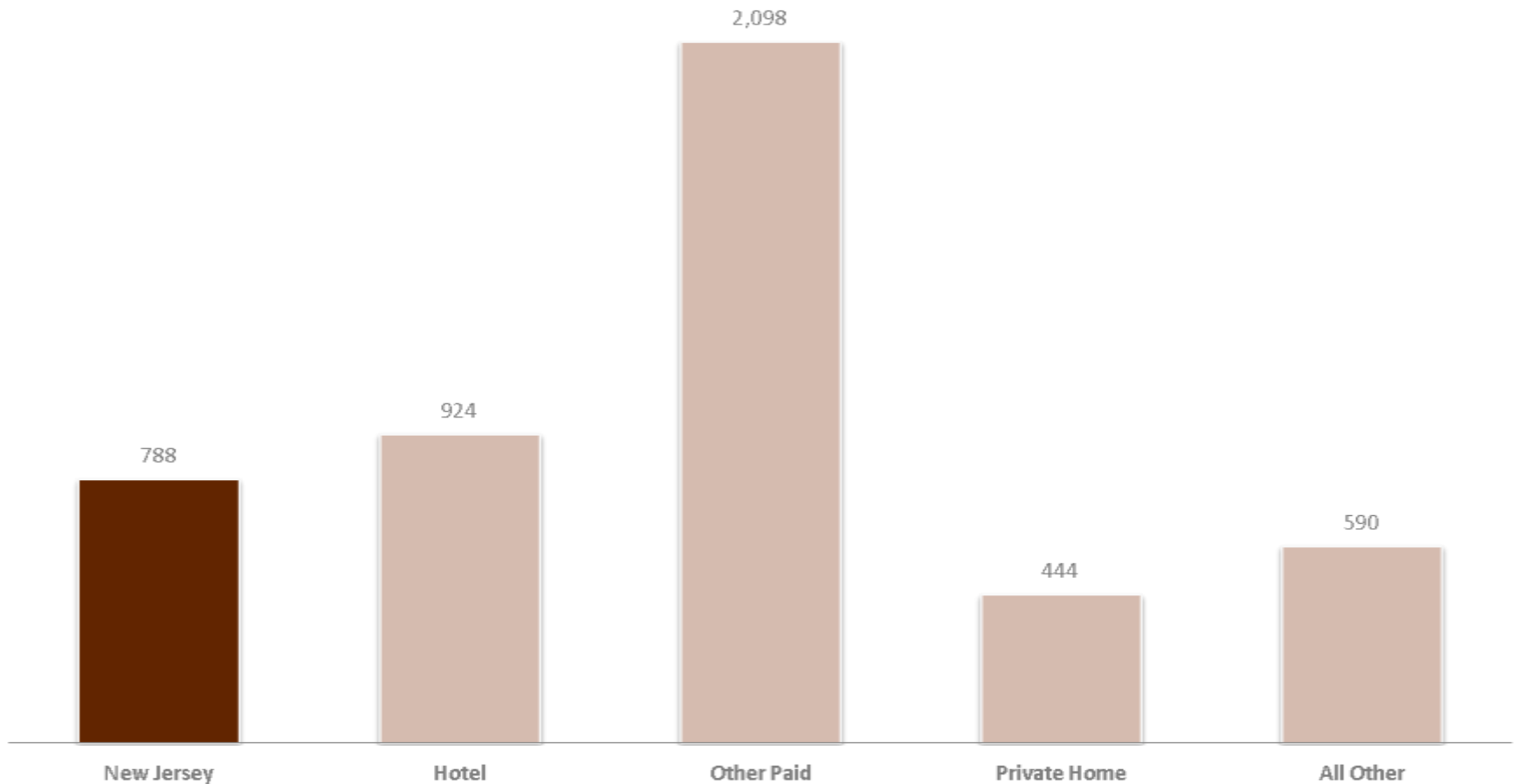


Chart 57 • Segment: 2008-2010 Overnight Leisure Stays (\$) • New Jersey N = 3,038 household count

New Jersey Accommodation Type Comparison

ACCOMMODATION

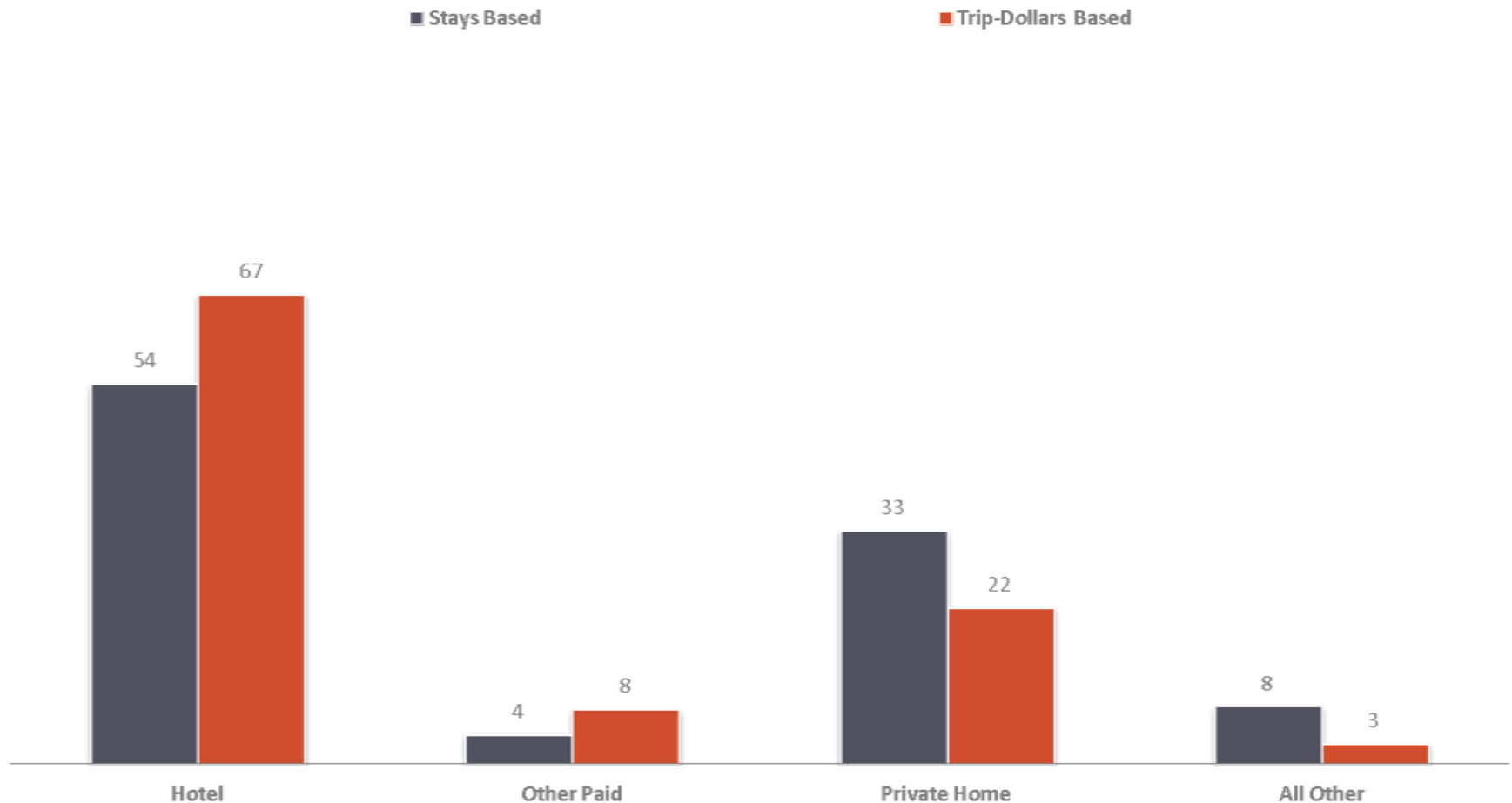


Chart 58 • Segment: 2008-2010 Overnight Leisure (\$) • New Jersey N = 4,319 household count

Excellent Destination Satisfaction vs. Value Ratings

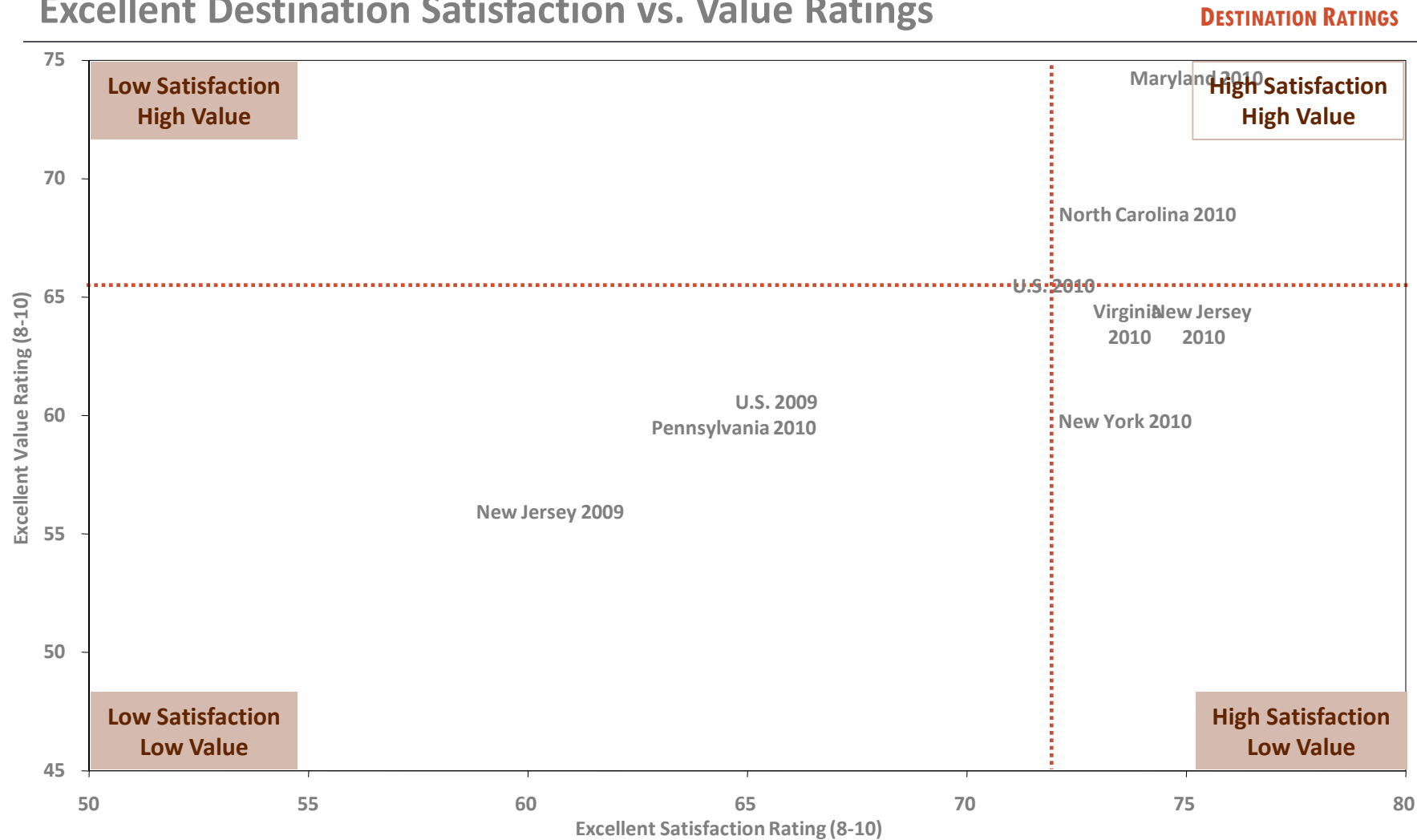


Chart 59 • Segment: 2009/2010 Overnight Leisure Person-Stays (%) • New Jersey N = 698 household count

Appendix

Statistical References

Confidence Interval

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

Leisure Travel	Sample Size for 2010	At or near 2% or 98%	At or near 5% or 95%	At or near 10% or 90%	At of near 25% or 75%	At or near 50%
U.S.	26,805	0.1%	0.2%	0.3%	0.4%	0.5%
New Jersey	880	0.6%	1.0%	1.5%	2.1%	2.8%
NJ w/o Atl City	527	0.7%	1.3%	1.9%	2.7%	3.6%
Comp Set	5,050	0.2%	0.4%	0.6%	0.9%	1.2%
New York	1,509	0.4%	0.8%	1.1%	1.6%	2.1%
Pennsylvania	1,335	0.4%	0.8%	1.2%	1.7%	2.2%
Maryland	534	0.7%	1.3%	1.9%	2.7%	3.5%
Virginia	937	0.5%	1.0%	1.4%	2.0%	2.7%
North Carolina	1,161	0.5%	0.9%	1.3%	1.8%	2.4%

Example:

If the air travel finding for the U.S. is 12% and the sample size is 26,805, using the chart below, we can say that at the 90% level of confidence the proportion ranges between 11.7% and 12.3%.

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	13.0%	12.0%		1.96	95%
Sample Size (n)	49,732	26,805	3.97	1.64	90%

Example:

If the air travel finding for U.S. is 13% in previous time period and 12% in current time period, using the chart below, we can say that the actual proportion change is statistically significant since the resulting Z score (3.97) is larger than the table Z score (1.64).

Research Methodology

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

DKSA utilizes a mix mode data collection methodology of commercially available mail panel and Internet panels. The sample is drawn as a national probability sample and returns are balanced to ensure representation of the U.S. population according to the most recent U.S. Census. Key factors used for balancing are: Origin State, Age, Income, Education, Gender and return rates.

All households are surveyed for the incidence of travel each month so DKSA obtains a true measure of travel in the total population. Among those who have traveled in the past three months, details of their trip(s) are recorded for each month. This overlapping, repeating monthly approach boosts the observed number of trips for each travel month and controls for seasonality and telescoping biases. "Travel" is defined as a trip over 50 miles one-way from home or any travel night away from home. Respondents

report travel behavior for each trip and each stay; an approach that enhances reporting for specific travel events, activities and spending.

A wide variety of general travel information is collected including travel to destinations at a city level, hotel stayed in, purpose of trip and activities, expenditures, mode of transportation, trip party composition, length of stay, travel agent and group tour usage, satisfaction and value ratings, and demographics, including origin markets.

Several questions are asked as open-ends to insure that the responses are not influenced by a pre listed set of response categories. Each respondent identifies the actual destination visited with an open-end response. This is particularly significant for obtaining accurate data for smaller cities and counties and representing total travel. This increases time and expense to accurately capture these responses but quality requires it.

Each returned survey is scanned and reviewed for accuracy. Extensive coding lists are updated regularly to ensure that all data is recorded accurately. DKSA also conducts bi-weekly meetings to review survey results and examine methods to maintain and improve quality control.

About DKSA

D.K. Shifflet & Associates Ltd. is the leading U.S. consumer behavior research firm. DKSA is located in McLean, VA and has, for the last 27 years, provided the industry's most complete consumer based travel data on U.S. residents and their travel worldwide. Our clients include destination marketing organizations, theme parks, credit cards, auto clubs, hotel chains and more.