



New Jersey | 2004p OVERNIGHT LEISURE VISITOR PROFILE





Research Report Table of Contents



Executive Summary	5	Positioning	66
Market Assessment	8	Stay Purpose	68
Travel Party Volume	16	Travel Party Composition and Size	70
Person-Trips Volume	24	Stay Length	73
Person-Days Volume	32	Average Daily Per Person Spending	76
Traveler Spending	40	Activities	79
Market Share of U.S.	48	Transportation	82
Satisfaction and Value Ratings	49	Trip Timing	84
Targeting	51	Accommodations	87
Age	53	Positioning Summary Intelligence	89
Children in Household	55	Communicating	92
Household Income	57	Visitor Origin Markets	94
Household Lifestage	59	Travel Distance	97
Generation	62	Communicating Summary Intelligence	99
Targeting Summary Intelligence	65		



Research Report Table of Contents

(continued)



Appendices

Appendix A:	Company Overview	102
Appendix B:	Methodology	106
Appendix C:	Study Specifications and Definitions	108
Appendix D:	Questionnaire	123



How to Read this Report



- The report you are about to read is a comprehensive analysis of the travel market in New Jersey. After reviewing this report, it is DKS&A'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 which are further targeted to various roles within the tourism organization.
 - The *Market Assessment* section of this report will give the reader an understanding of the size of the tourism market in New Jersey.
 - The *Targeting* section describes travelers to a destination and helps travel marketers and planners target future visitors by identifying the largest market segment, as well as the growth segments.
 - In the *Positioning* section, the reader will gain an in-depth understanding of the destination's positioning against the competition, which will help to better craft product offerings and messages to the target markets.
 - Finally, the *Communicating* section will help the reader know from where the destination's visitors are originating so that they can launch marketing campaigns that are developed from the intelligence provided in the *Targeting* and *Positioning* sections.
- Each of these sections is further divided into three sub-sections:
 - *Section Introduction*: The introduction will introduce the reader to the analysis that will be presented in the upcoming section so the reader will have a better understanding of the fine details.
 - *Detailed Data Graphs*: The detailed data graphs present the data in two primary ways
 - the destination compared to the U.S. and Competitive Set,
 - the destination's performance between 2004p and 2003.
 - *Section Summary Findings*: The section summary findings review the key conclusions from the data presented in the detailed graphs. This section is good for busy executives who need to know the key conclusions from the data.



Executive Summary



Background

This New Jersey visitor study provides preliminary travel intelligence on U.S. and New Jersey domestic travel trends in 2004. Information is also provided for a set of five competing destinations (Maryland, New York, North Carolina, Pennsylvania, and Virginia) Volume and profile data are from D. K. Shifflet & Associate's *PERFORMANCE/MonitorSM TRAVEL INTELLIGENCE SYSTEM* – the largest travel-tracking system in the U.S. The 2004 New Jersey Overnight Leisure visitor profile is based on a preliminary sample of 911 travel parties. Appendix B contains details on study methodology, while Appendix C contains definitions of many of the terms in this report.

Market Assessment

New Jersey Volume Trends: New Jersey travel volume performed on par with national level performance and far exceeded the U.S. on some measures. Total travel party party volume in New Jersey increased 5.9% to 33.6 million in 2004p. This translated into 70.3 million travelers, an increase of 3.1% over 2003. Person-day volume also increased in 2004p by 3.7% reaching 127 million person-days. Spending by all domestic travelers in New Jersey in 2004p increased 4.2% amounting to over \$13 billion for the State.

In New Jersey's overnight leisure market travel was strong in 2004p. The number of overnight leisure travel parties in New Jersey increased 6.4% to 10.8 million travel parties in 2004p. The number of overnight leisure travelers increased by 9.1% to reach 25.2 million person-trips. Since travel party volume, person-trip volume, and average party size increased in New Jersey, overnight leisure person-days increased 6.2% to reach 82.9 million person-days in 2004p. Total spending by overnight leisure travelers in New Jersey reached a high of \$7.7 billion, 59% of total travel spending in the State.

New Jersey Market Share: When evaluating the size of the travel market by travelers (person-trips), the U.S. overnight leisure market grew 3.5%. This created an opportunity for destination's to grow their business and New Jersey fared well. New Jersey gained share of the overnight leisure travel market in 2004p. In 2003 the State held 2.06% of the market and in 2004p commanded 2.28%.



Executive Summary



Targeting

New Jersey's primary market segments remained relatively similar over the last few years. When characterizing overnight leisure visitors by basic demographics, the largest proportion (40%) of overnight leisure visitors are between the ages of 35-54. Visitors to the state are also likely to have no children under 18 in the household, 69%. Finally, New Jersey hosts many visitors with high incomes, with 52% of overnight leisure visitors with an annual income over \$75,000. The median income of overnight leisure travelers in 2004p was \$77,400.

Another way to segment overnight leisure visitors in New Jersey is by Lifestage, a combination of age, income, and family status. Among the Lifestage segments, the highest proportion of overnight leisure visitors to New Jersey are 55 years of age or older with high incomes and no children under the age of 18 in the household, 25%, followed by visitors 35-54 with no children, 22%.

Finally, marketers can also segment their target markets by generation. In this case, New Jersey hosts a majority of Boomers, 40%, for overnight leisure travel to the State, followed by Gen X'ers, 34%.

Positioning

New Jersey can be characterized by some primary factors common in the State's overnight leisure market. New Jersey is primarily a state for getaway weekends where 34% of visitors travel for that purpose. This is significantly higher than the share of getaway weekends within the competitive set, 18%. To attract more general vacations, which account for only 19% of New Jersey travel, the State faces strong competition from Maryland, Virginia, and North Carolina.

It is also common for couples to travel to the state, accounting for 47% of overnight leisure travelers. The average party size of overnight leisure visitors to New Jersey is 2.3 persons and they stay for an average of 2.5 nights. Visitors also spend an average of \$103 per person per day in New Jersey, equal to the U.S. average but higher than the competitive set.



Executive Summary



The top activities that overnight leisure visitors participate in while visiting New Jersey for overnight leisure is gaming (42%), entertainment (29%), dining (29%), and visiting beaches and waterfronts (27%). These are also activities that New Jersey exceeds in against the competition.

New Jersey is a drive-to state as 88% of overnight leisure visitors arrive by auto. New Jersey attracts the highest share of overnight leisure visitors in the third quarter (July-September) accounting for 32% of its travel. New Jersey also offers strong travel opportunities in the first quarter (January-March) as it attracts 24% of it's travelers during this quarter compared to only 17% within the competitive set.

The vast majority of overnight leisure visitors to the state stay at a hotel, 58%. This is a notable difference than national and competitive levels where only 47% of travelers in the U.S. and 43% of travelers in the competitive set stay in a hotel when on leisure travel.

Communicating

New Jersey draws the majority of its overnight leisure visitors from its residents and New York state, accounting for 27% and 23% of the market, respectively. In terms of key metro areas, the top DMAs to target are New York City (40% of NJ market), Philadelphia (23%), Washington, D.C. (6%), Baltimore (3%), and Boston (2%).



Market Assessment

How many visitors does New Jersey attract?
What is New Jersey's share of U.S. and regional travel?



Targeting

Who are New Jersey's most important visitors?



Positioning

How should New Jersey position its product?



Communicating

Where should New Jersey advertise and promote?



Market Assessment



How is New Jersey doing compared to the competitors in capturing market share?

What are the trends?





Market Assessment Introduction



- The Market Assessment section of this report will provide an overview of the New Jersey travel market by reviewing travel volume trends. Travel volume is measured with four performance indicators (described in detail on the next page) to help destinations understand past market movements and prepare for possible changes in the future.
- Travel volume is estimated from D.K. Shifflet & Associates *PERFORMANCE/Monitor*SM monthly travel tracking system and uses other available travel data as model inputs, such as hotel lodging data and government transportation statistics.
- The section ends with a review of traveler satisfaction and value ratings of New Jersey. The ratings are compared to the competition using the U.S. as a benchmark and will give destinations competitive intelligence on consumer perceptions of travel satisfaction and value.



Unweighted: the raw data that contains no links to the population or DKS&A modeling; it is simply respondent data as returned to us on the surveys.

Respondent Weight: links to the population and not to any modeling of the data. This weight weights the data by the demographic characteristics of age, gender, income, education, number of adults, and state of residence.

Travel Party Weight: the most basic travel weight. It is the broadest unit used for measuring a travel experience. To arrive at the stays weight, the respondent weight is adjusted based on certain variables in order to ensure that there are a certain number of trips that fit a certain number of standards. These adjustments are based on length of stay, length of trip, mode of transportation, purpose of trip, and special adjustments for particular mailing months and destinations.

Mr. & Mrs. Smith's 5-day vacation in Anytown, USA = 1 travel party.

Person-Trips Weight: The total number of people on a stay, regardless of the length of their stay. This measure generally equates to the number of visitors.

Mr. & Mrs. Smith's 5-day vacation in Anytown, USA = 2 person-trips or 2 visitors.

Person-Days Weight: The total number of people on a stay multiplied by the number of days they are on the stay.

Mr. & Mrs. Smith's 5-day vacation in Anytown, USA = 10 person-days. (2 person-trips x 5 days)

Room-Nights Weight: The number of nights spent in a room, regardless of the number of people staying in the room.

*Mr. & Mrs. Smith's 5-day vacation in Anytown, USA = 5 room-nights.
(given they stayed in a paid accommodation (most applicable))*

Trip-Dollars Weight: Use of this weight takes into account the amount of money spent by travelers. In other words, it accounts for the dollars contributed to a destination's economy by travelers. Using the trip-dollars weight shows the monetary worth/contribution of travelers as opposed to the contribution of number of trips or number of days spent in the destination.

If Mr. & Mrs. Smith spent \$100 per person per day on their 5-day vacation in Anytown, USA, their trip expenditures would be \$1,000 (10 person-days x \$100 per person per day).



New Jersey Detailed Findings



Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.

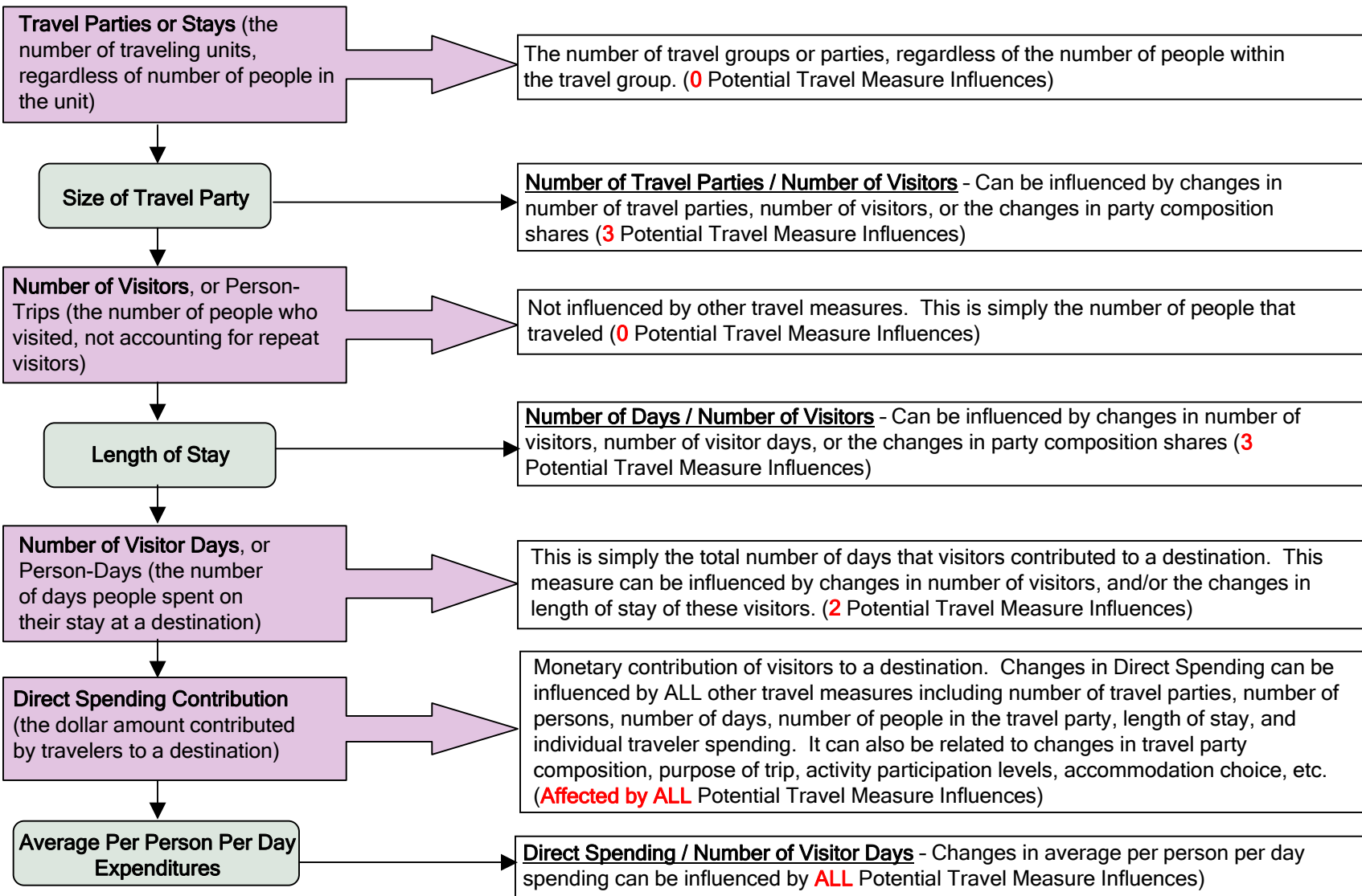


Key Market Assessment Summary – Understanding the Travel Measures



- It is important to understand the various ways in which to measure travel market performance.
- Visitation to a market can be measured in terms of 7 key, interrelated travel measures outlined on the following slide.
- Changes in most travel measures are caused by changes in other travel measures. The graphic on the following page depicts how these travel measure variables are related to each other.

When interpreting your destination travel data, remember to consider how the travel measures are interrelated to determine drivers of changes in your travel marketplace.



New Jersey Volume Changes Explained



		2003	2004 p	% Change
Travel Parties (millions)	Total	31.7	33.6	5.9%
	Business	8.7	8.5	-2.0%
	Leisure	23.0	25.1	8.9%
Average Party Size (persons)	Total	2.1	2.1	-2.7%
	Business	1.4	1.4	-0.6%
	Leisure	2.4	2.3	-4.2%
Visitors (person-trips) (millions)	Total	68.2	70.2	3.1%
	Business	12.6	12.3	-2.6%
	Leisure	55.5	58.0	4.4%
Average Stay Length (days)	Total	1.8	1.8	0.6%
	Business	1.6	1.6	-0.3%
	Leisure	1.8	1.9	0.6%
Visitor Days (person-days) (millions)	Total	122.7	127.2	3.7%
	Business	20.3	19.7	-2.9%
	Leisure	102.4	107.4	5.0%
Average Party Spending (dollars)	Total	396.7	390.2	-1.6%
	Business	304.0	348.8	14.8%
	Leisure	431.8	404.3	-6.4%
Total Direct Spending (billions of dollars)	Total	12.6	13.1	4.2%
	Business	2.6	3.0	12.5%
	Leisure	9.9	10.1	2.0%
Spending per Person per Day (dollars)	Total	102.6	103.1	0.5%
	Business	130.2	150.8	15.8%
	Leisure	97.2	94.4	-2.9%

A comparison of New Jersey's travel market in 2003 and 2004p showed increases in the number of travel parties, visitors, average length of stay, number of visitor days, per party per trip spending, and total direct spending, but a decline in average party size and daily spending. The state's leisure market fared much better than the business market on all measures except daily per person and per party spending levels.

Total travel party volume and person-trip volume increased, however, average party size declined, indicating vastly more travel parties in the market

The number of person-days increased

- A result of the increase in travel party volume and length of stay.

Direct Spending by travelers increased

- A result of many influences including the increases in visitors, person-days, and length of stay.

The following pages provide detailed changes in other travel segments



New Jersey Travel Party Volume Trends



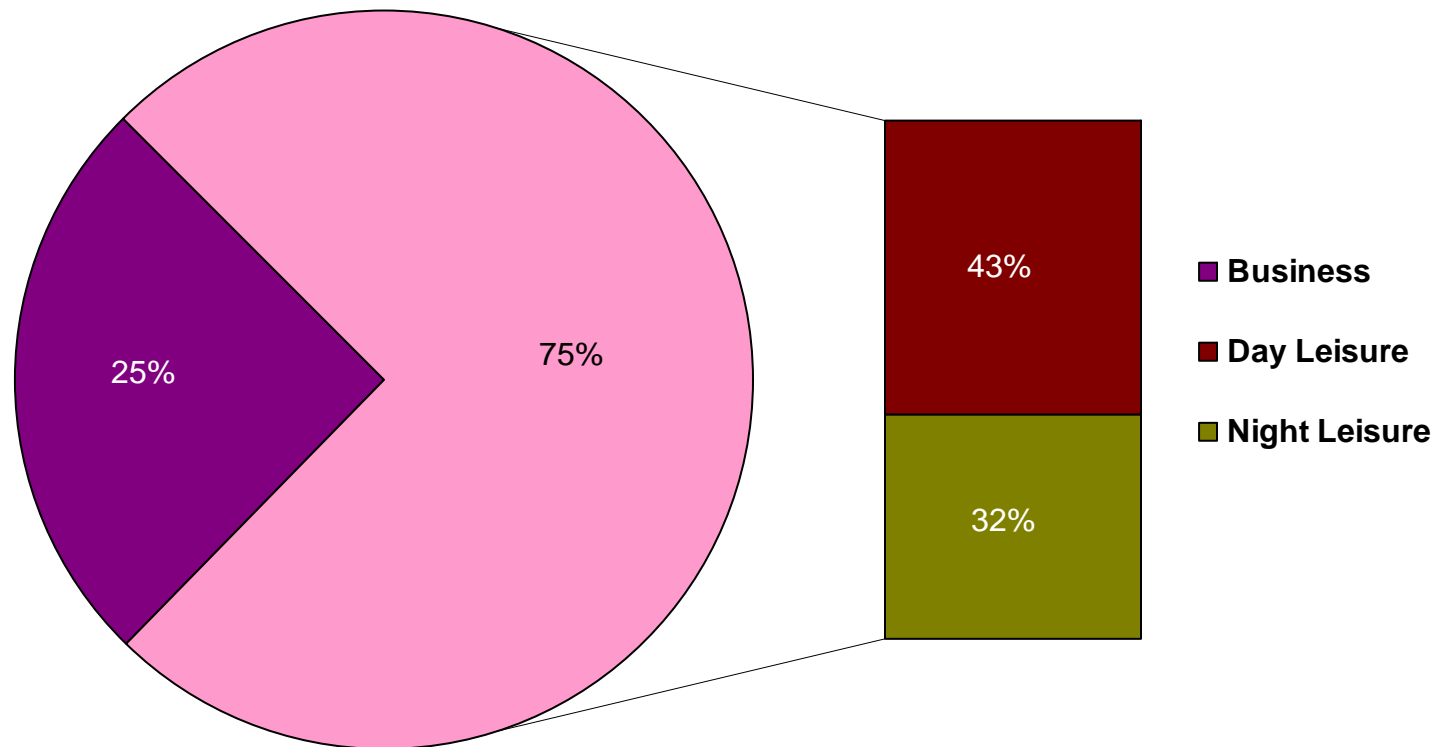
- The following section will detail the travel party volume trend in New Jersey over the last six years. Travel party volume measures the number of groups that visited a market.

Mr. & Mrs. Smith's 5-day vacation in Anytown, USA = 1 travel party

2004p New Jersey Travel Party Distribution: Business vs. Leisure



The following chart represents each travel segment's share of total travel party volume in New Jersey. Leisure travel is a critical segment for New Jersey tourism as it represents 75% of all travel party volume to and within the State. In the leisure segment, day leisure represents a large majority of travel, accounting for 43% of total travel volume, higher than the share of all business travel.

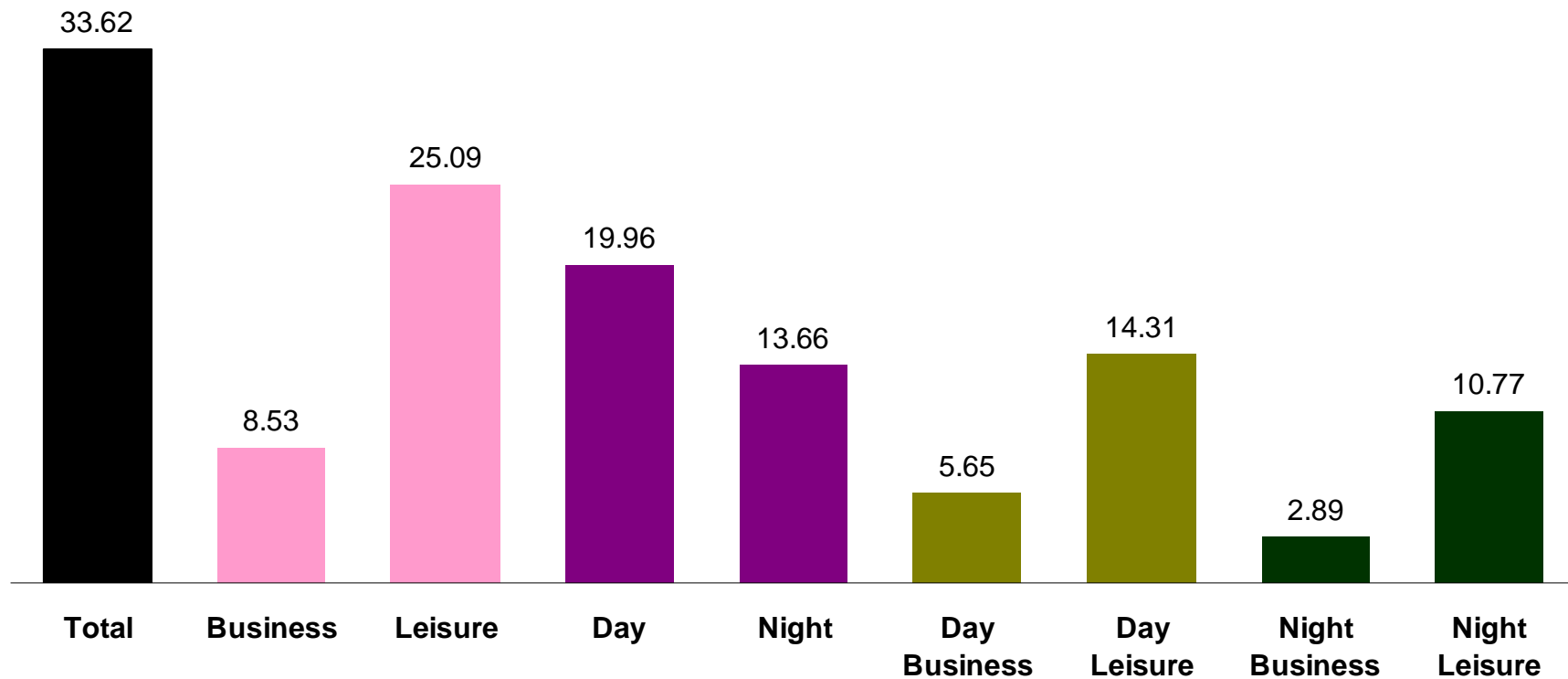




New Jersey Travel Party Volume Summary (2004p/millions)



The chart below summarizes the travel party volume in 2004p for several travel segments.

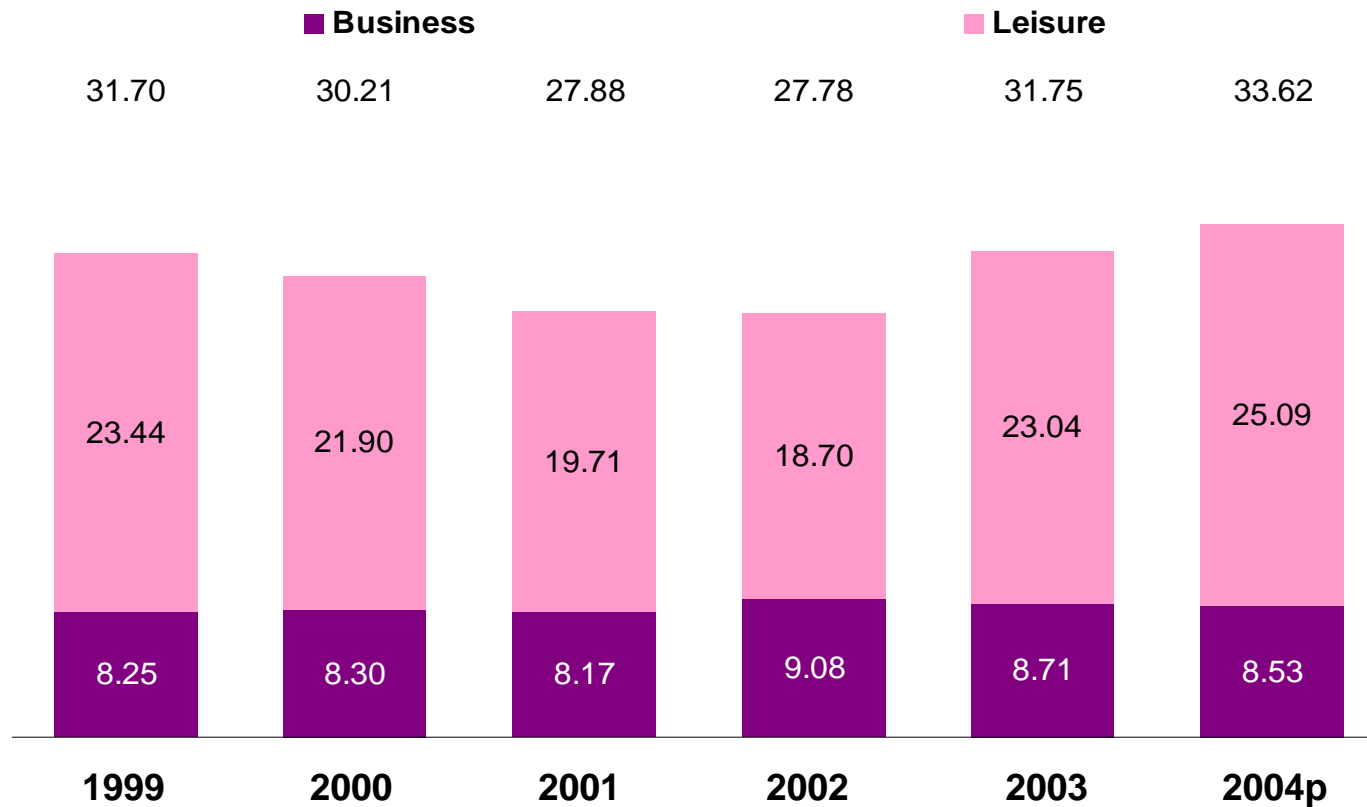




New Jersey Travel Party Volume: Business vs. Leisure (1999-2004p/millions)



Travel party volume in New Jersey increased steadily and in 2004p exceeded a high set in 1999. Total travel party volume reached 33.6 million in 2004p, an increase of 5.9% over 2003. The growth in total travel was led solely by the leisure market which expanded 8.9% while the business segment fell 2% in 2004p.



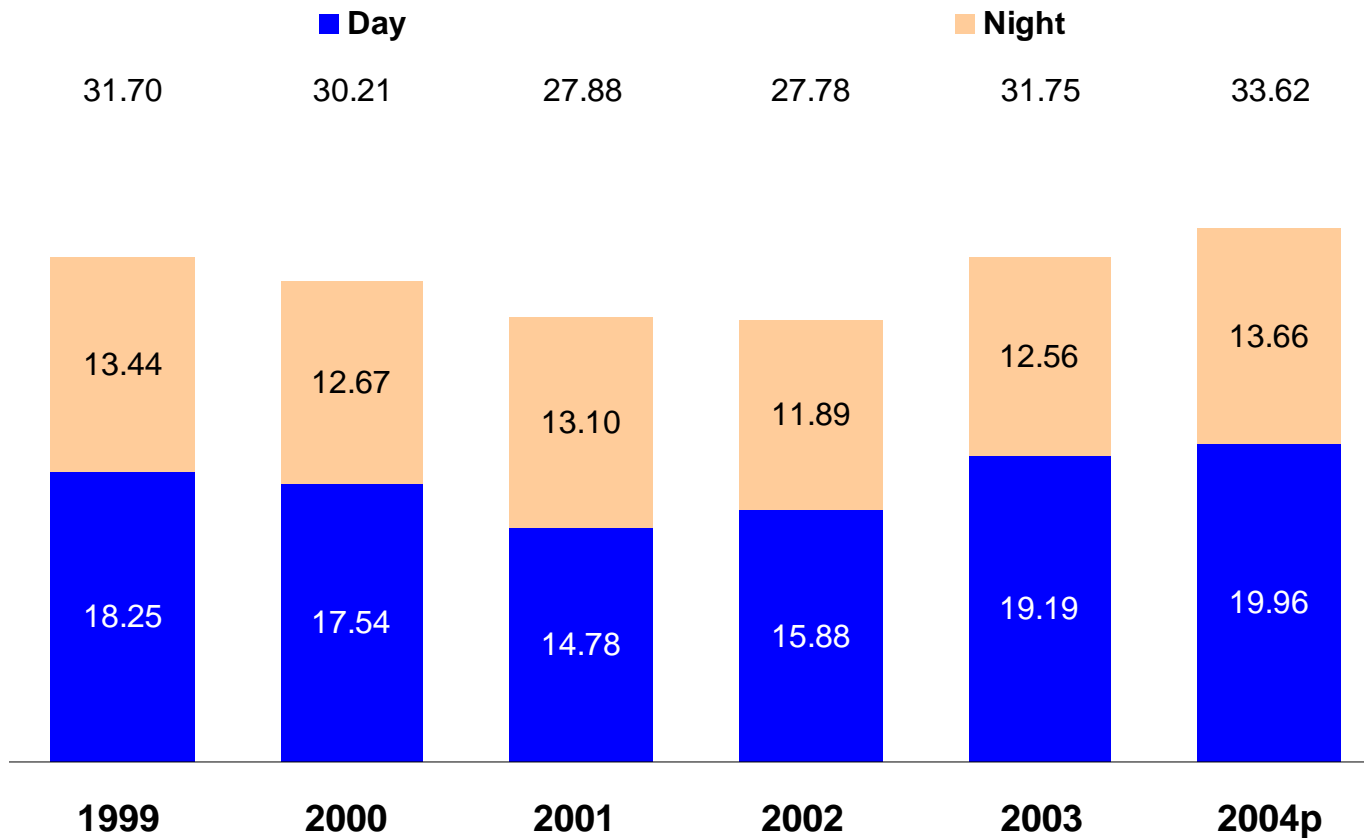
Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.



New Jersey Travel Party Volume: Day vs. Overnight (1999-2004p/millions)



The majority of New Jersey travel parties visit the state for a day-trip reaching almost 20 million travel parties in 2004p. The overnight segment had a strong increase of 8.7% which helped the segment to recover from a two-year decline and reach a new high of 13.66 million overnight travel parties.



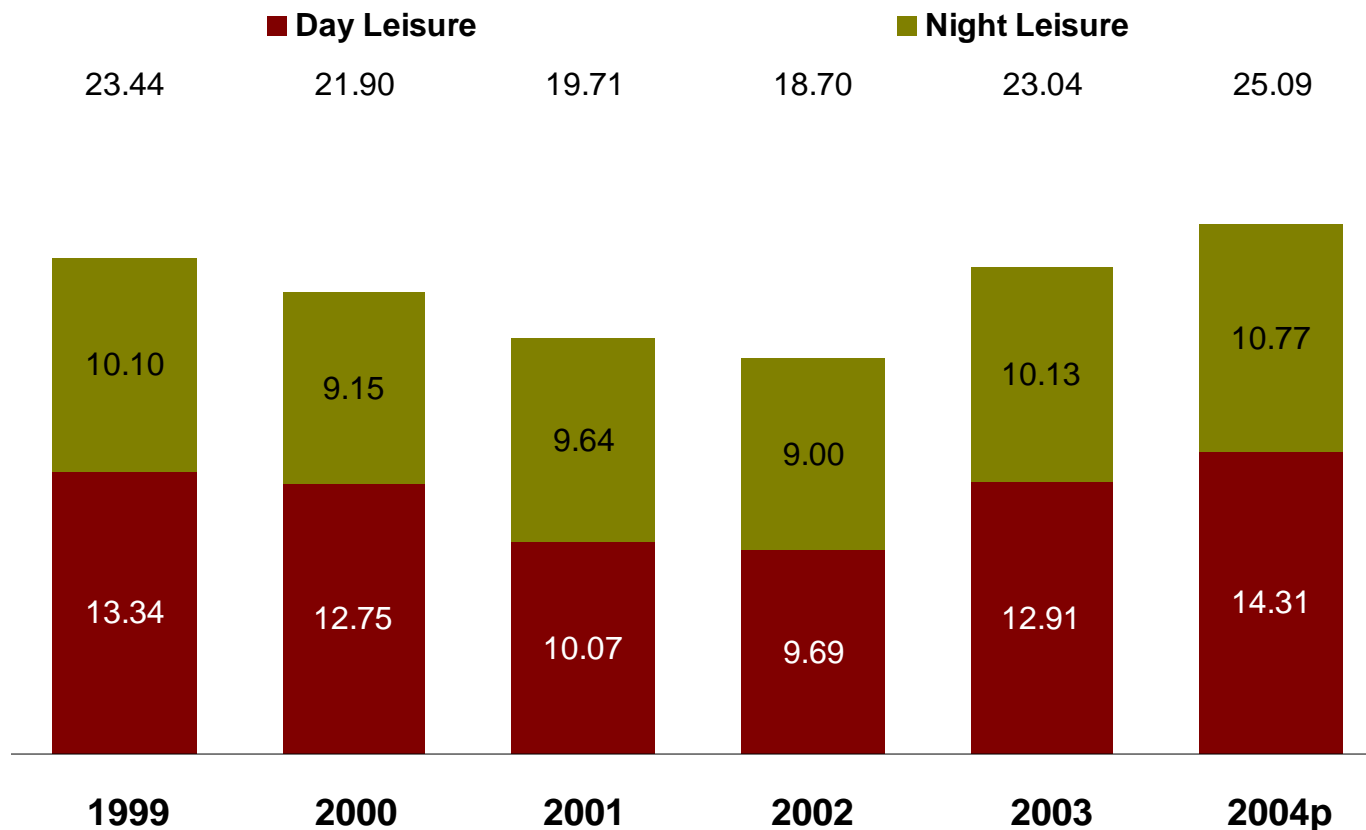
Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.



New Jersey Travel Party Volume: Day Leisure vs. Overnight Leisure (1999-2004p/millions)



The strong 8.9% growth in the leisure segment brought travel party volume in New Jersey to a full recovery of over 25 million leisure travel parties in 2004p. This growth was caused by a 10.9% increase in the day market and 6.4% increase in the overnight market, both exceeding previously set records.



Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.



New Jersey Travel Party Volume: % Change by Travel Segment



% Change 04/03

Total

New Jersey 5.9%

U.S. 1.5%

Leisure

New Jersey 8.9%

U.S. 3.1%

Overnight Leisure

New Jersey 6.4%

U.S. 2.9%

The Leisure market was a strong market for travel growth in the Nation and for the state of New Jersey.

The number of overnight leisure travel parties increased at the National and State level. However, New Jersey enjoyed stronger growth of 6.4% from 2003, compared to the U.S. which grew 2.9%.



New Jersey Travel Party Volume Intelligence



- Total travel party volume in New Jersey reached 33.6 million in 2004p, the State's second year of volume growth. The 5.9% increase was caused solely by the leisure market which increased 8.9% over 2003 while business travel party volume fell 2.0%.
- Business travel party volume fell to 8.5 million in 2004p, the second year of decline in business travel parties to the State.
- Leisure travel grew to 25.1 million travel parties in 2004p, creating three straight years of leisure growth. The leisure segment grew due to increases in both the day and overnight leisure segments.
- Overnight leisure travel party volume to New Jersey grew 6.4% in 2004p reaching 10.8 million. However, the day leisure segment dominates total leisure travel with 14.3 million travel parties in 2004p, a 10.9% increase over 2003.



New Jersey Person-Trips Volume Trends



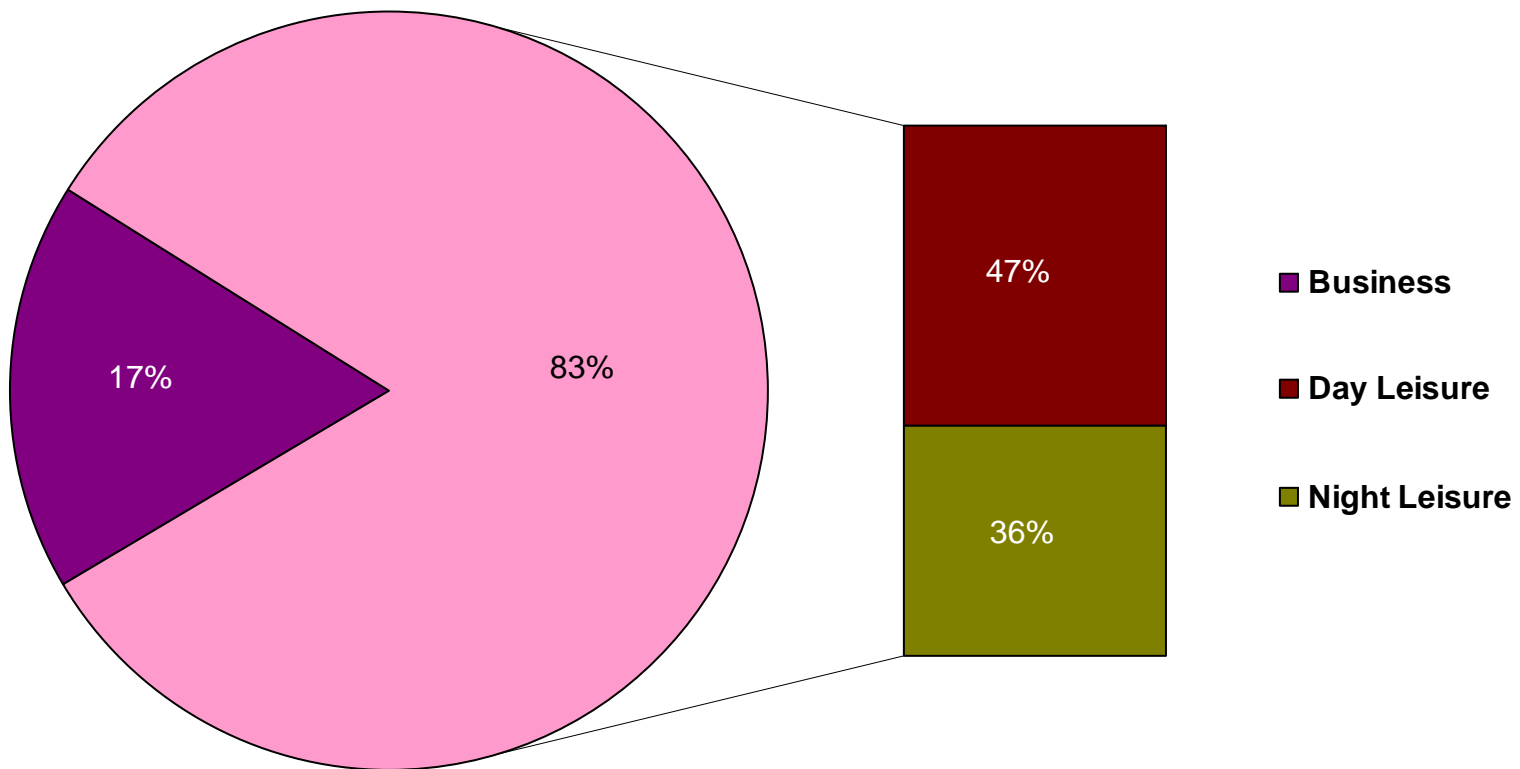
- The following section will detail the person-trip volume trend in New Jersey over the last six years. Person-trips volume measures the number of people that traveled to a market and includes any repeat visits.

Mr. & Mrs. Smith's 5-day vacation in Anytown, USA = 2 person-trips.

2004p New Jersey Person-Trips Distribution: Business vs. Leisure



When evaluating the person-trip volume measure, leisure travel holds even greater importance to New Jersey travel as it represents 83% of total person-trip volume. This indicates that the average party size for leisure travel parties is larger than business travel parties.

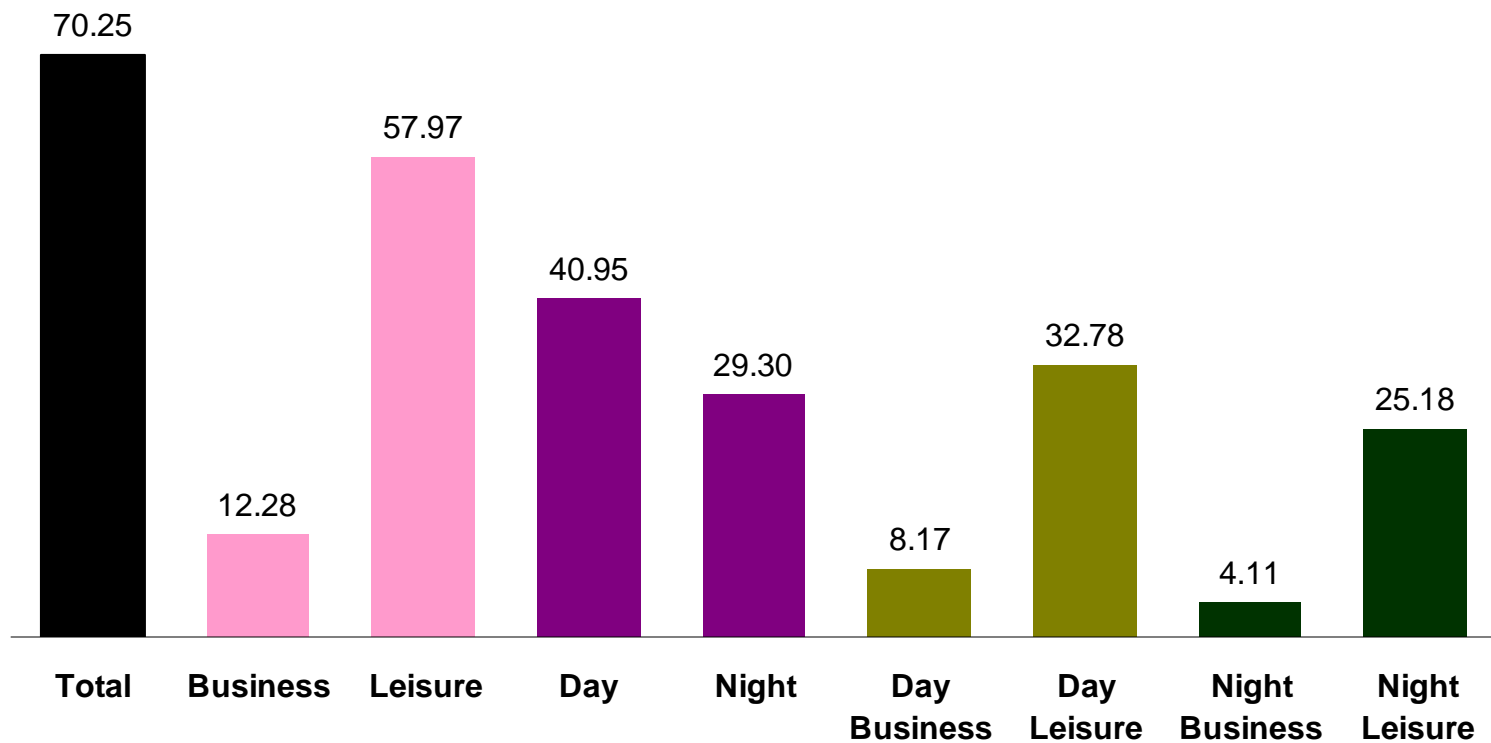




New Jersey Person-Trips Volume Summary (2004p/millions)



This chart shows person-trips volume for each of the major travel segments. Person-trips is the volume measure emphasized in this report because it represents travelers, which combines the number of trips taken and the number of travelers on those trips.

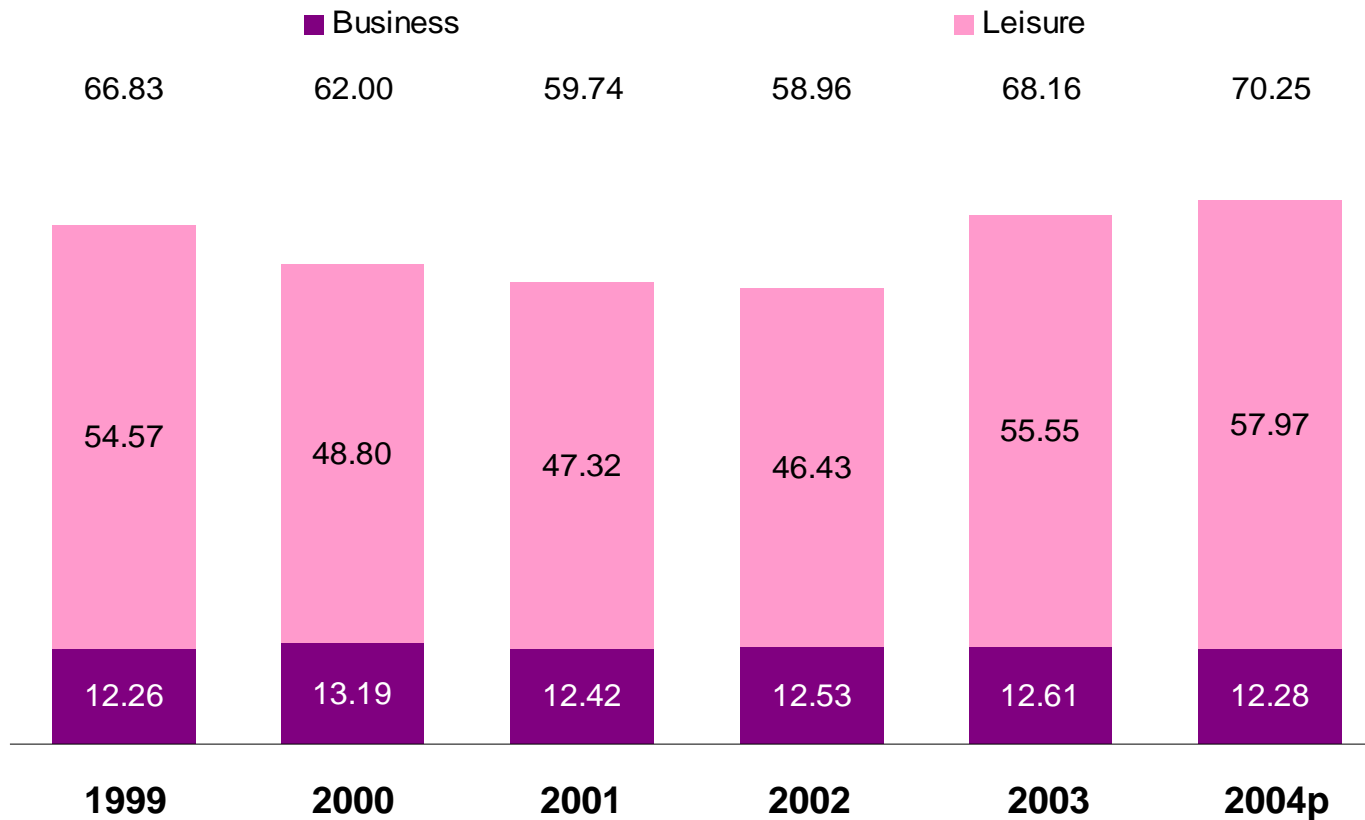




New Jersey Person-Trips Volume: Business vs. Leisure (1999-2004p/millions)



Total person-trip volume in New Jersey reached a high of 70.25 million in 2004p. Total person-trip volume growth was due to a 4.4% increase in leisure person-trips. Business person-trip volume in New Jersey fell 2.6% to 12.28 million in 2004p.



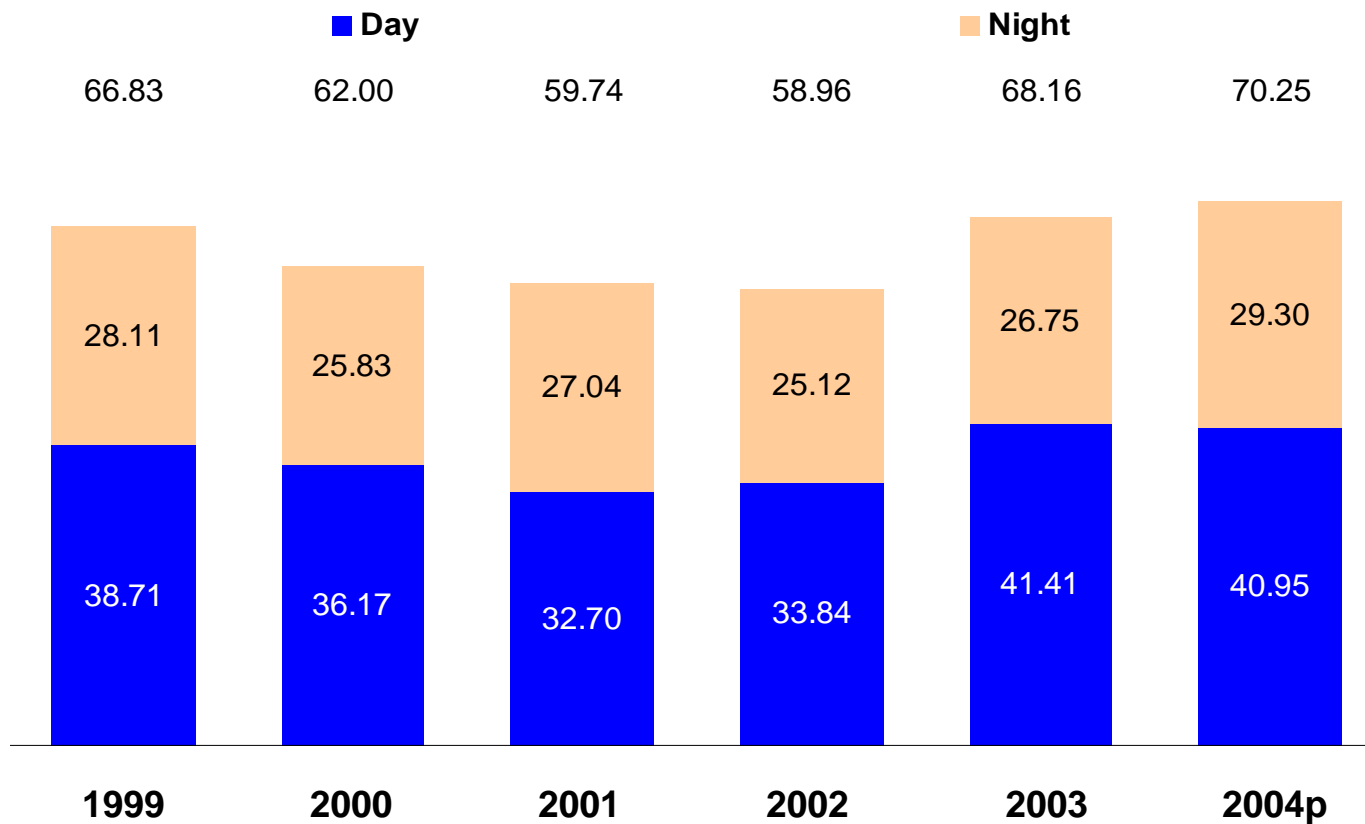
Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.



New Jersey Person-Trips Volume: Day vs. Overnight (1999-2004p/millions)



Overnight travel volume in New Jersey increased 9.5% in 2004p bringing the segment to a new high in person-trip volume of 29.30 million. Day-trip person-trip volume fell 1.1% in 2004p but still accounts for the majority of volume with 40.95 person-trips.



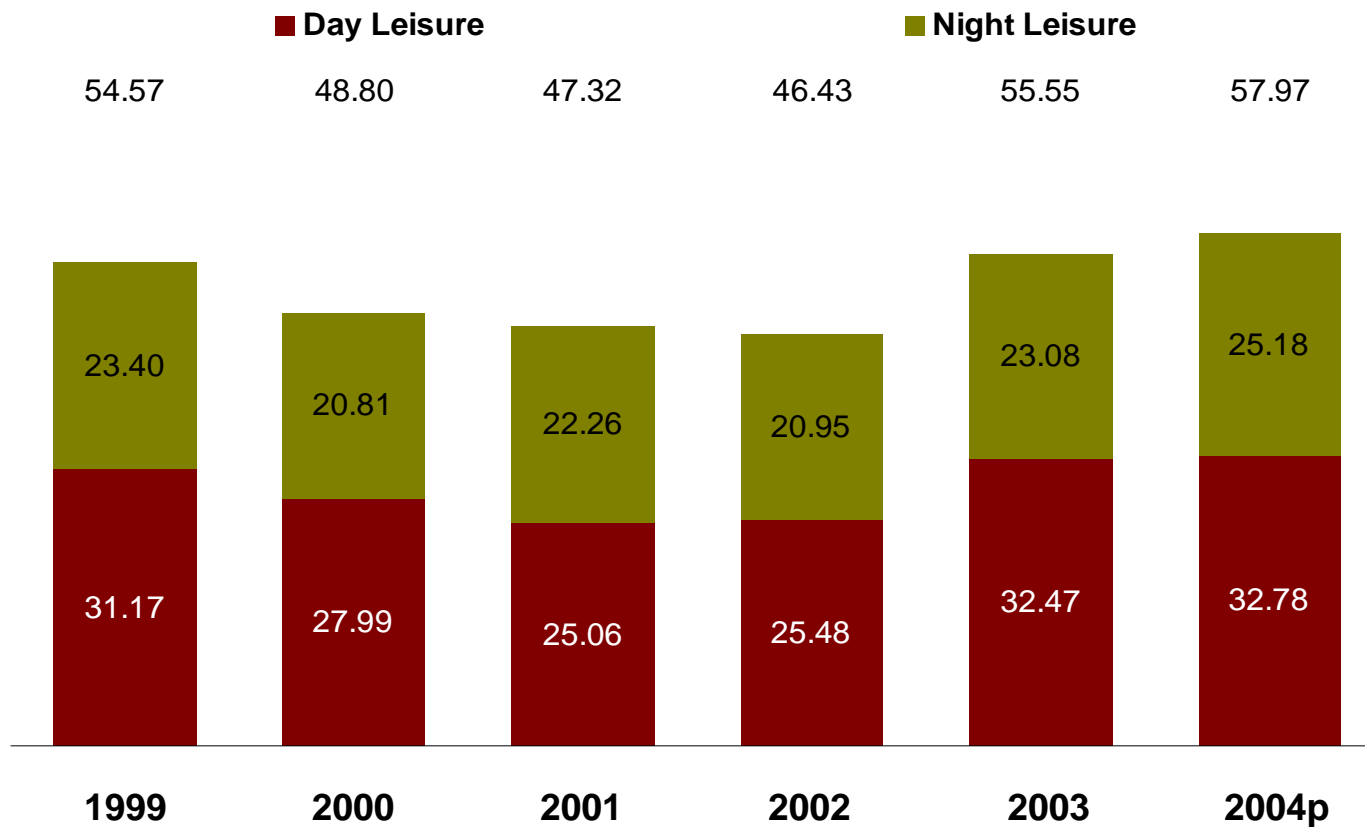
Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.



New Jersey Person-Trips Volume: Day Leisure vs. Overnight Leisure (1999-2004p/millions)



Leisure travel, which increased 4.4% in 2004p, contributed 57.97 million person-trips to New Jersey travel. The vast majority of the growth occurred in the overnight leisure segment which increased 9.1% to 25.18 million person-trips in 2004p. The day leisure segment, however, only grew 1.0% reaching 32.78 million person-trips.



Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.



New Jersey Person-Trips Volume: % Change by Travel Segment



% Change 04/03

Total

New Jersey	3.1%
U.S.	2.7%

The number of individual visitors grew at the National and State level. New Jersey performed slightly better than the U.S. for total travel, 3.1% growth versus 2.7%.

Leisure

New Jersey	4.4%
U.S.	3.7%

The overnight leisure travel market grew 3.5% at the National level. New Jersey travel volume far exceeded the U.S. trend with 9.1% growth.

Overnight Leisure

New Jersey	9.1%
U.S.	3.5%



New Jersey Person-Trips Volume Intelligence



- The total number of travelers, or person-trips, in New Jersey reached a new high in 2004p with 70.3 million person-trips to the State. The 3.1% growth was led by the 4.4% increase in leisure volume as business volume was down 2.6%.
- The number of business travelers decreased in New Jersey for the first time in two years, falling to 12.3 million person-trips in 2004p. The decrease in business person-trips was due to a decrease in the number of travel parties in the market as well as a smaller party size.
- Leisure travel accounts for 83% of total person-trip volume in New Jersey and reached almost 58 million in 2004p. Growth in day and overnight leisure travel led to the overall growth in leisure visitor volume.
- While day leisure accounts for almost 57% of total leisure travel, the overnight leisure segment in New Jersey grew a strong 9.1% in 2004p reaching 25.2 million person-trips. Day leisure person-trips also increased to reach 32.8 million person-trips.



New Jersey Person-Day Volume Trends



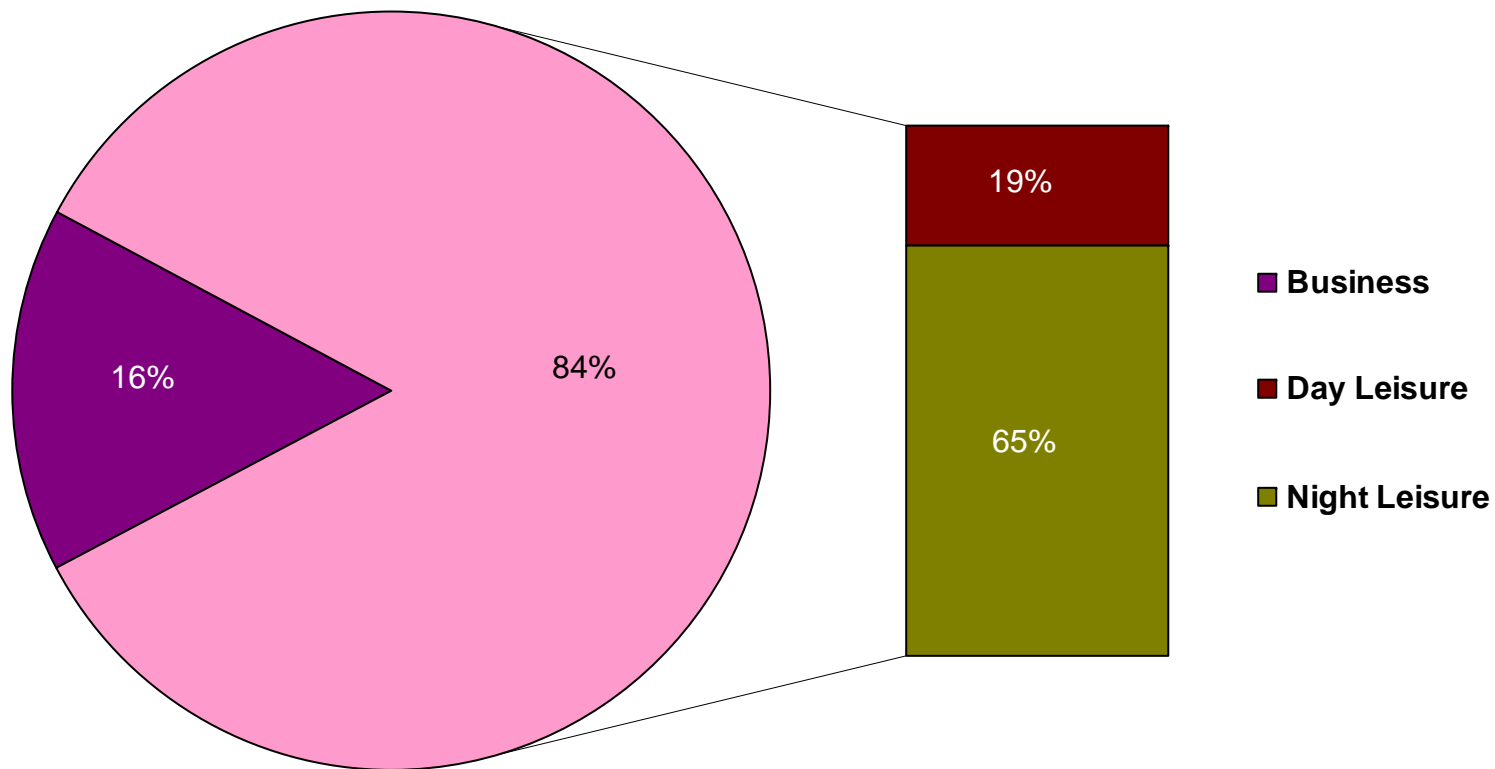
- The following section will detail the person-day volume trend in New Jersey over the last six years. Person-day volume measures the total impact of a visitor to a market by including the length of stay and party size into the volume measure.

Mr. & Mrs. Smith's 5-day vacation in Anytown, USA = 10 person-days. (2 person-trips x 5 days)

2004p New Jersey Person-Days Distribution: Business vs. Leisure



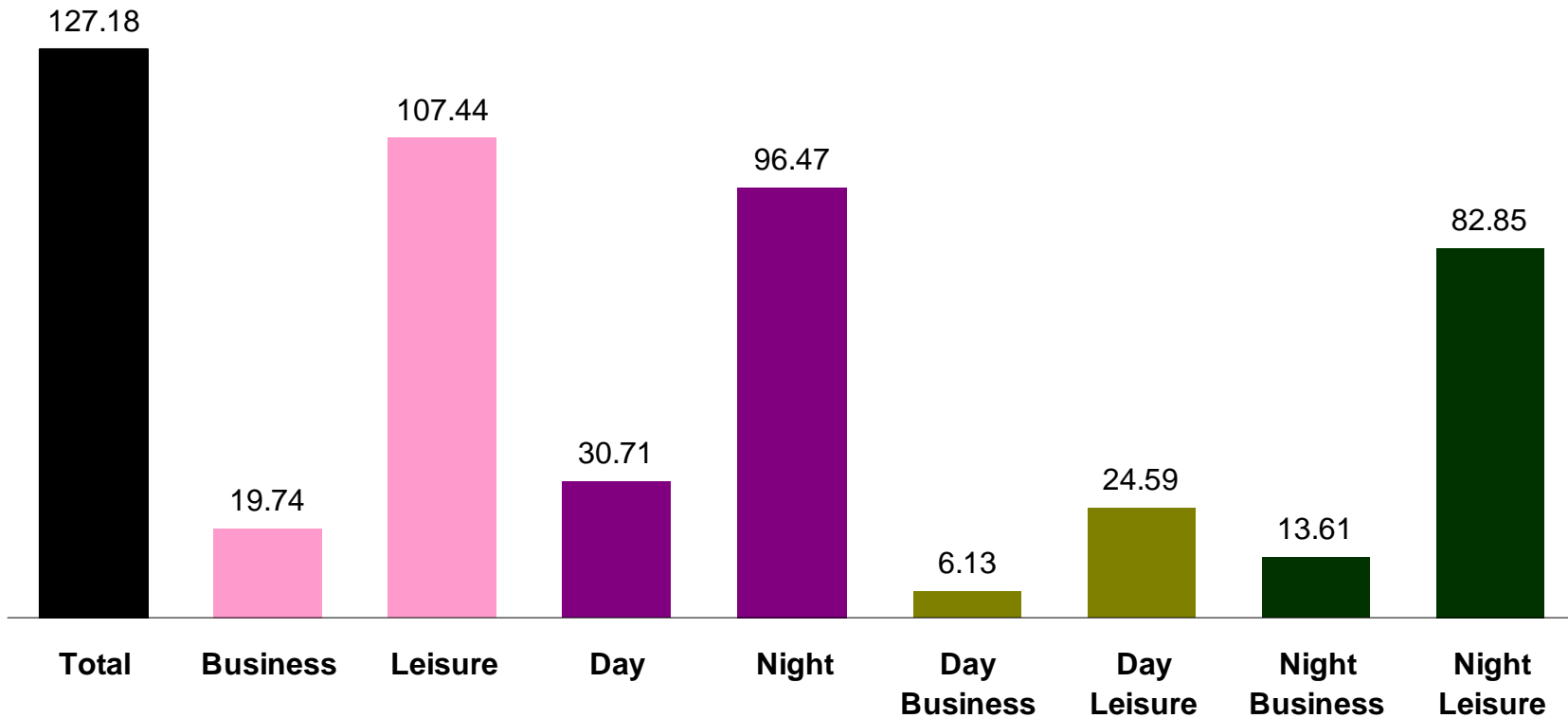
Leisure travel also accounts for the majority of person-day travel volume in New Jersey. In fact, the overnight leisure segment represents the majority of total person-day volume with 65% of the total travel market in New Jersey.



New Jersey Person-Days Volume Summary (2004p/millions)



This chart shows person-days volume for each of the key travel segments. Person-day volume accounts for all three components of travel- the number of trips taken, average party size, and average stay length. The Overnight Leisure segment's domination over overnight business is greater, reflecting a longer stay length among Overnight Leisure visitors than overnight business

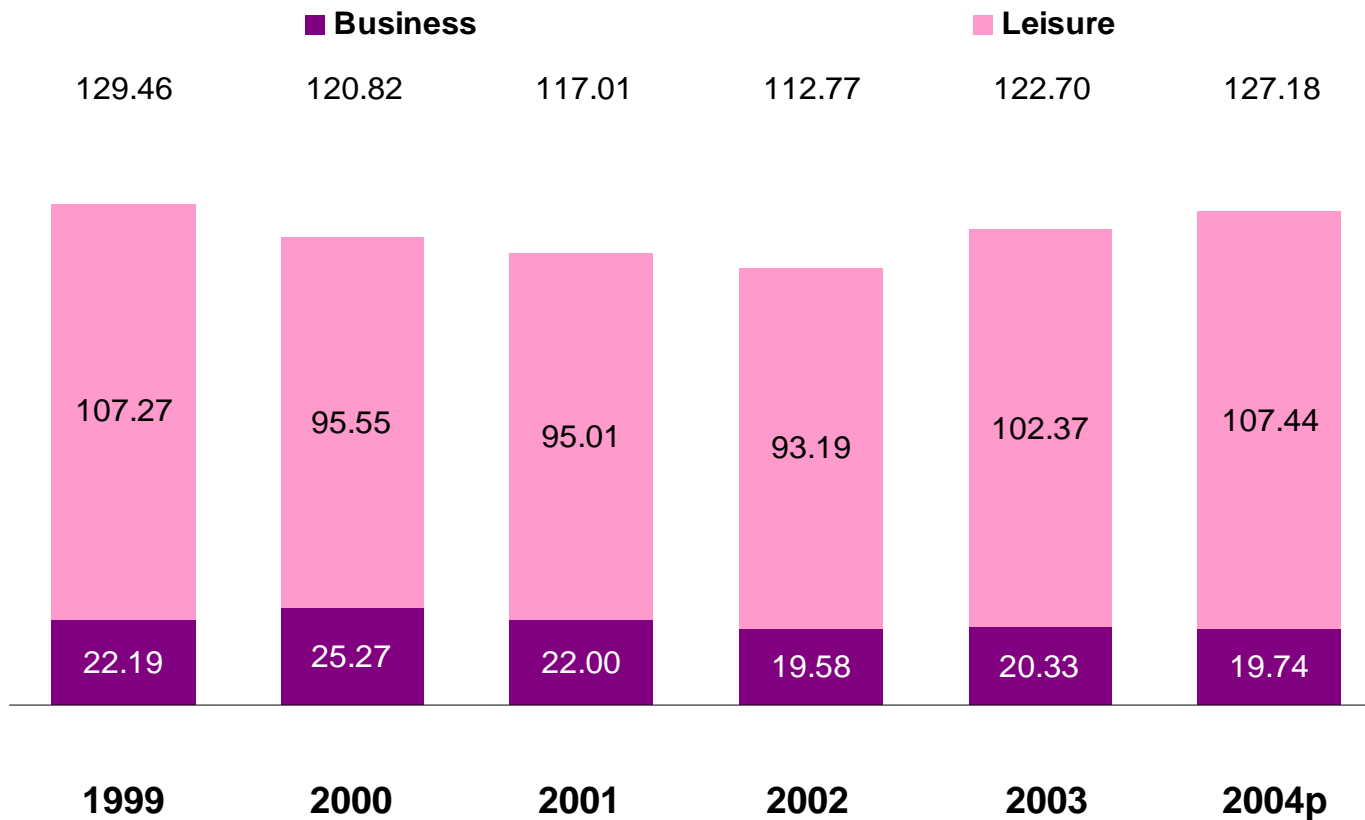




New Jersey Person-Days Volume: Business vs. Leisure (1999-2004p/millions)



Total person-day travel volume in 2004p reached a new height of 127 million person-days, an increase 3.7% over 2003. While person-day volume in the business segment fell 2.9%, leisure volume increased 5.0% to 107.44 million person-days.



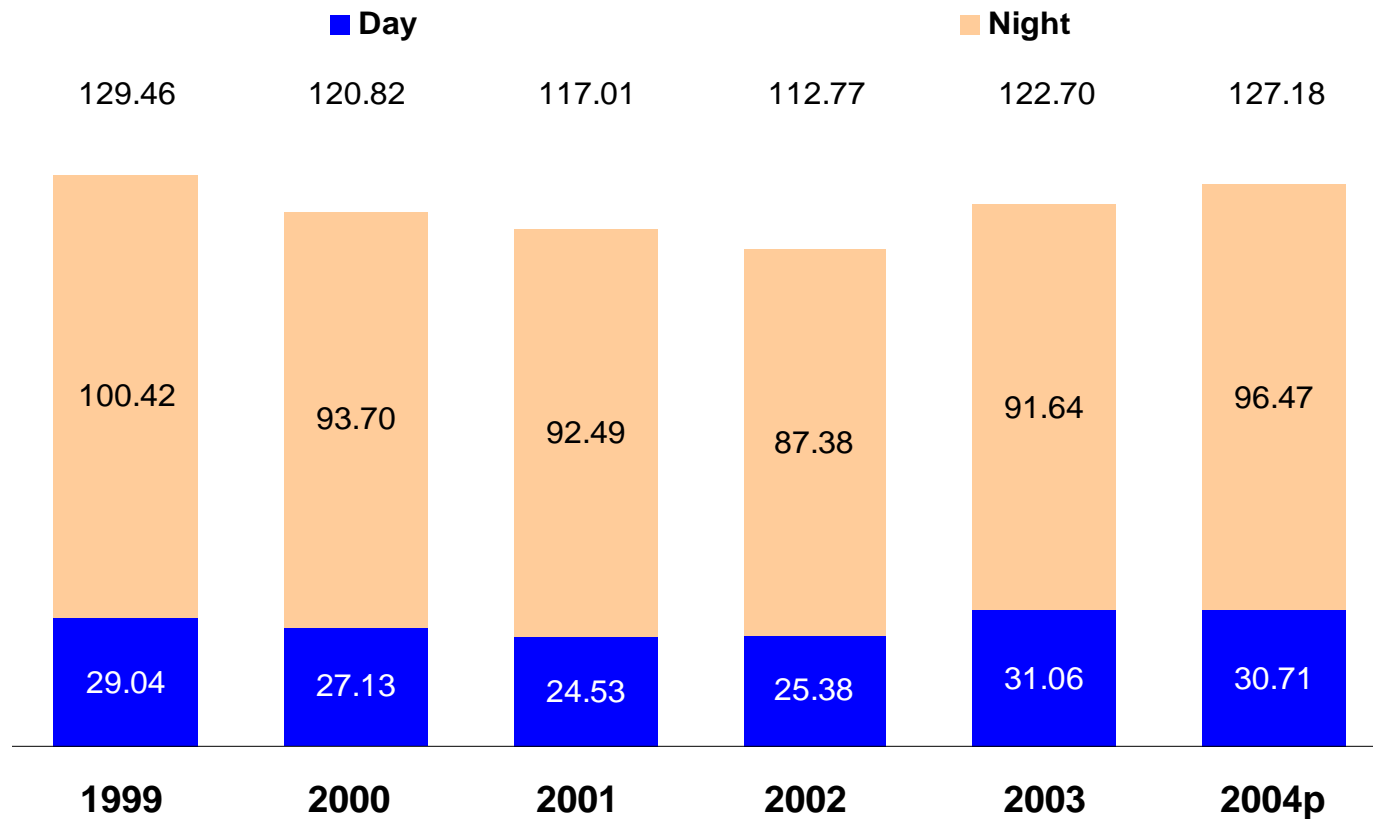
Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.



New Jersey Person-Days Volume: Day vs. Overnight (1999-2004p/millions)



Between the overnight and day-trip travel segments, the overnight market accounted for the increase in total travel with an increase of 5.3%. Overnight travel reached 96.47 million person-days in 2004p but still hasn't reached the high of 100.42 person-days in 1999. The day-trip segment declined 1.1% to 30.71 million person-days in 2004p.

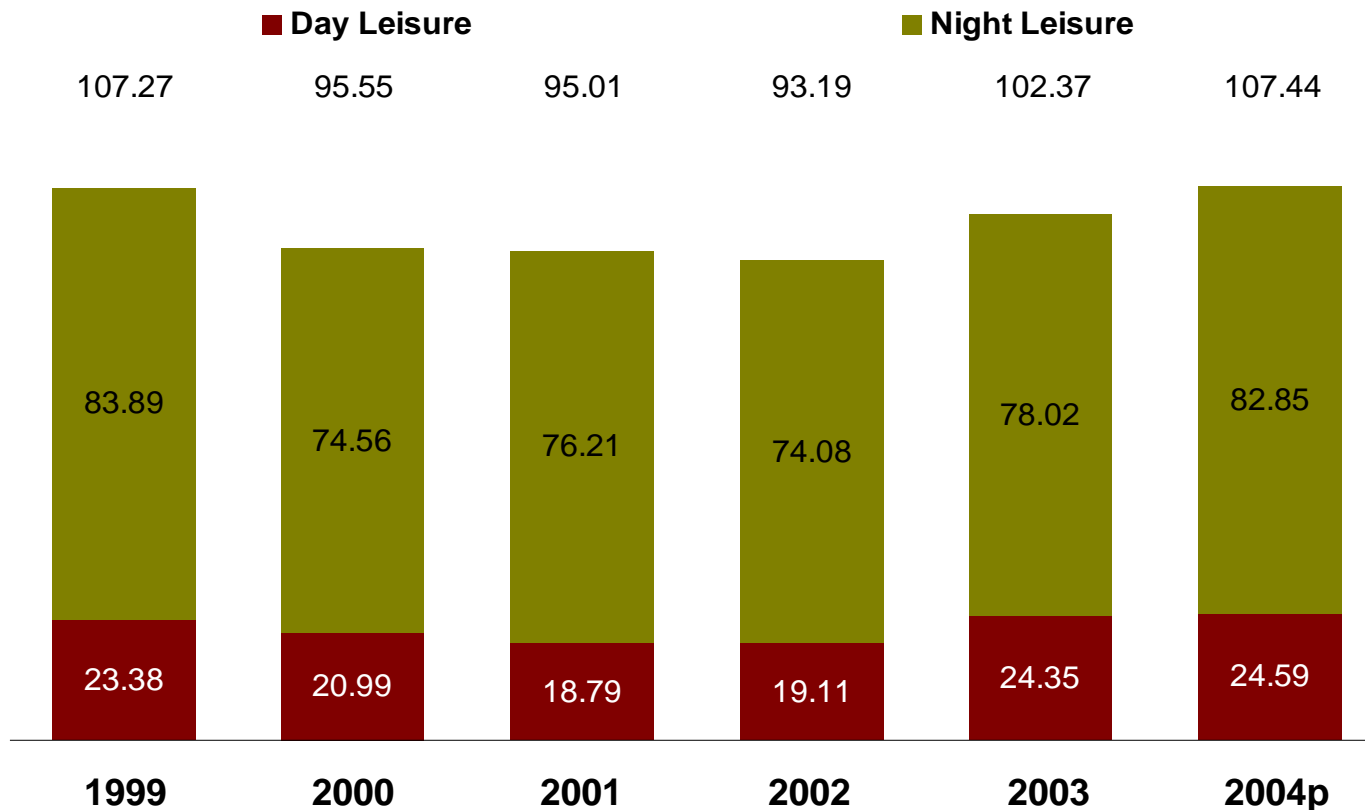


Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.

New Jersey Person-Days Volume: Day Leisure vs. Overnight Leisure (1999-2004p/millions)



Overnight leisure travel volume increased 6.2% in 2004p leading to 82.85 million person-days in New Jersey. This growth, while strong, still did not help the segment to recover from four years of changing growth patterns. The day leisure segment also increased at 1.0% to reach 24.59 million person-days in 2004p.





New Jersey Person-Days Volume: % Change by Travel Segment



% Change 04/03

Total

New Jersey 3.7%

U.S. 2.6%

Leisure

New Jersey 5.0%

U.S. 2.6%

Overnight Leisure

New Jersey 6.2%

U.S. 2.4%

Total person-day volume grew at both the national level and in the State of New Jersey. New Jersey performance was slightly better than the U.S. with 3.7% and 2.6% growth, respectively.

Likewise, in the overnight leisure segment, New Jersey person-day volume grew well past the U.S. with 6.2% growth and 2.4% growth, respectively.



New Jersey Person-Days Volume Intelligence



- Total person-day volume in New Jersey experienced the second year of growth reaching 127.2 million person-days in 2004p. The 3.7% increase was caused by an increase in the number of travel parties in the market and increased length of stay.
- Business person-day volume fell -2.9% to 19.7 million person-days in 2004p. Several factors led to the decrease in business volume - fewer travel parties, smaller party sizes, and decreased length of stay - all drove business person-day volume down in New Jersey.
- Leisure person-day volume in New Jersey fared better than the business segment, increasing 5.0% in 2004p. Leisure volume grew to 107.4 person-days caused by more travel parties in the market and an increased length of stay.
- In the leisure segment, both day and overnight leisure volume grew by 1.0% and 6.2% respectively. Overnight leisure reached 82.9 million person days and day leisure reached 24.6 million person-days in New Jersey in 2004p.



New Jersey Direct Spending Trends

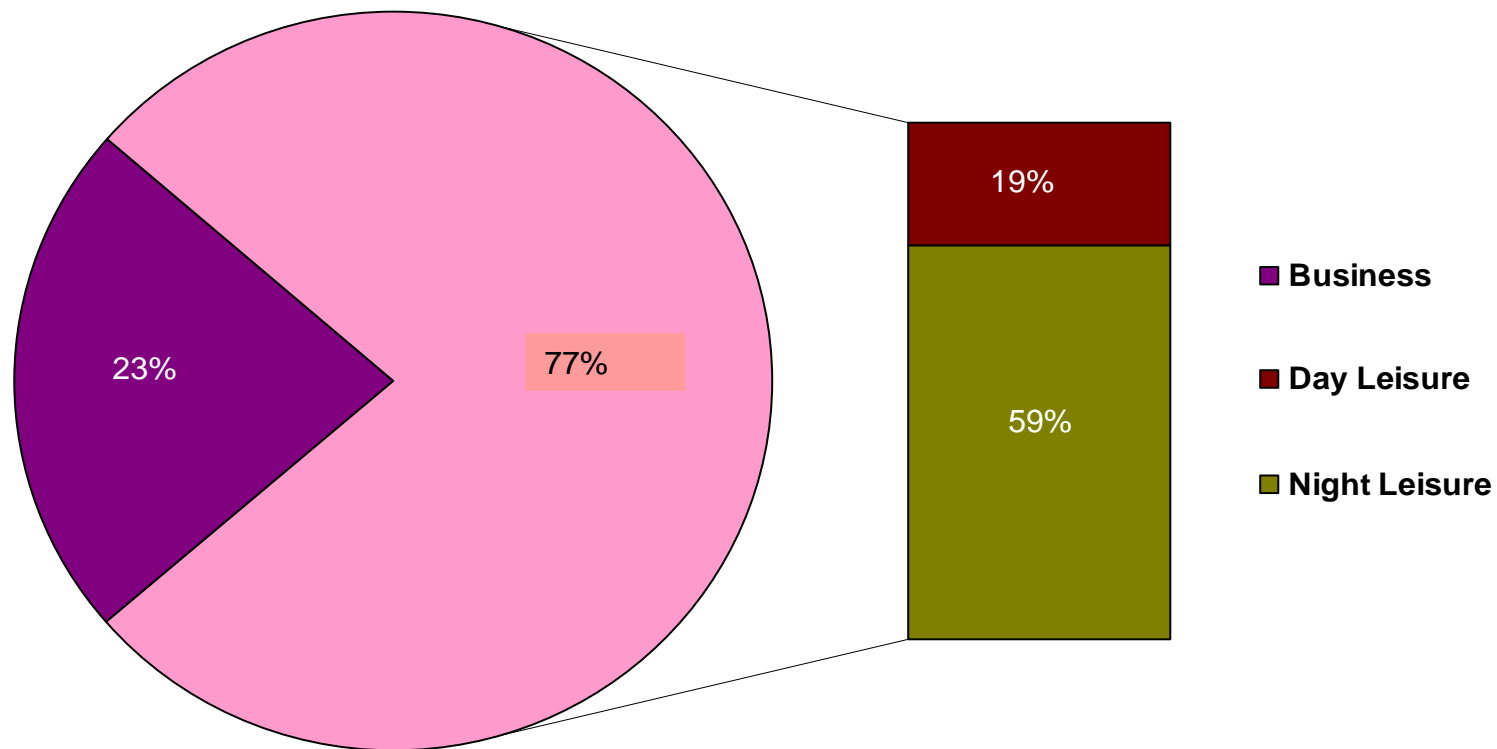


- The following section will detail the direct spending volume trend in New Jersey over the last six years. Direct spending volume measures the total traveler spending in a market. The direct spending measure tracks total traveler spending on transportation, room, food, entertainment, shopping, and other miscellaneous travel costs. Direct spending does not measure the indirect or induced economic impact driven by traveler spending.

2004p New Jersey Direct Spending Distribution: Business vs. Leisure



The importance of the overnight leisure travel segment is highlighted in the chart below. In terms of travel spending in New Jersey, the overnight leisure segment accounts for the majority of spending contributions, 59%. This segment accounts for a higher share of business spending and the vast majority of leisure spending.

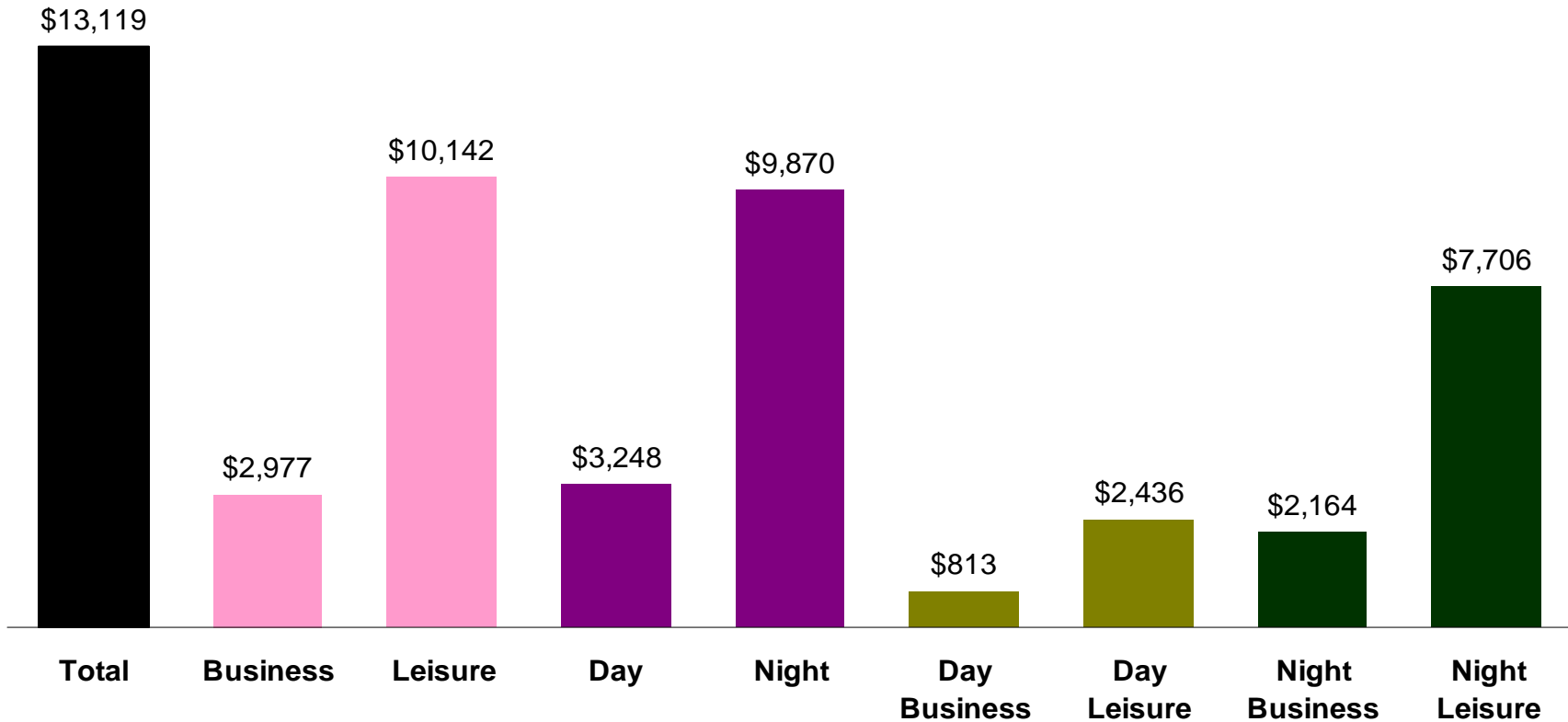




New Jersey Direct Spending Summary (2004p/\$millions)



This chart summarizes New Jersey traveler spending for each of the travel segments discussed in this report. Direct spending (no indirect or induced spending impacts included) includes spending by travelers on transportation, accommodations, food and beverage, shopping, entertainment, and other miscellaneous purchases.

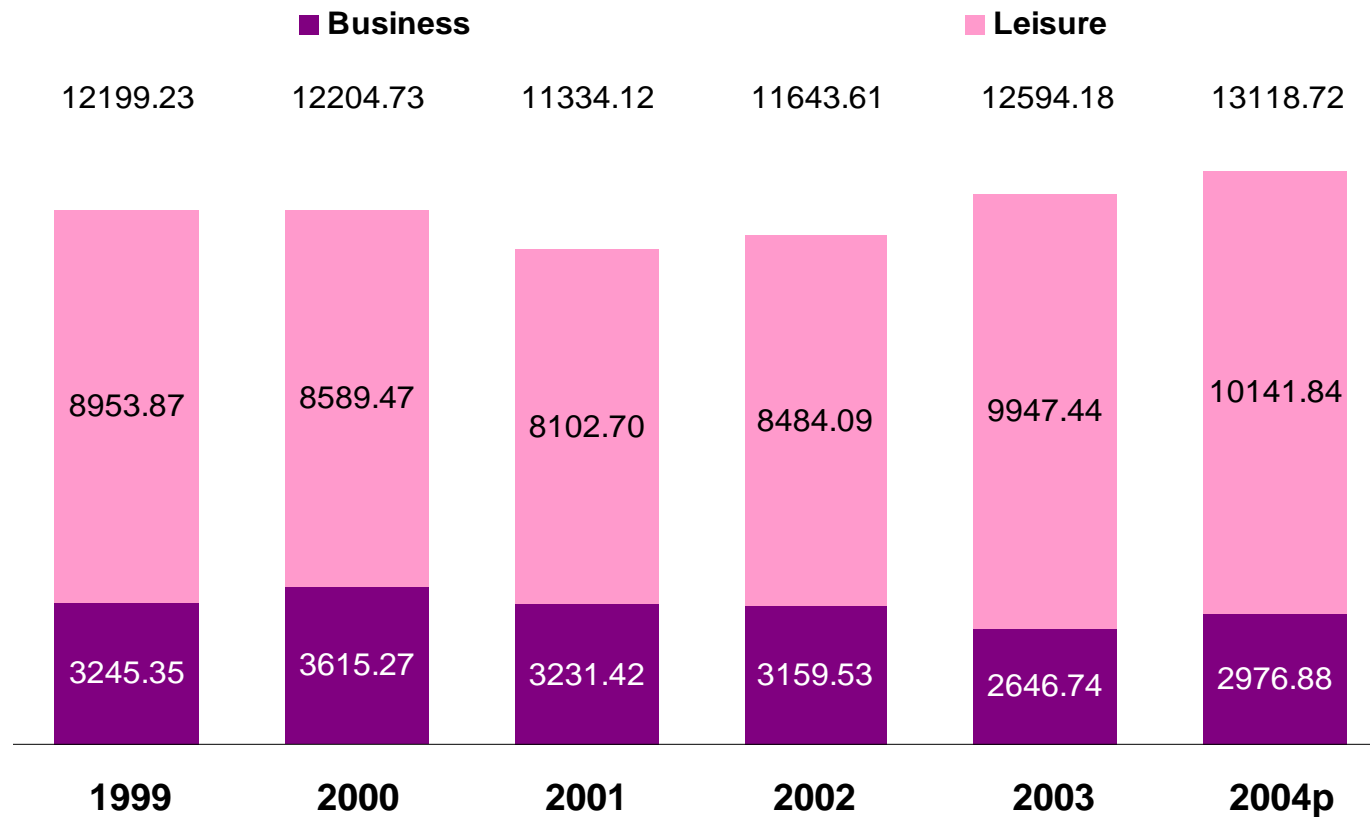


Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.

New Jersey Direct Spending: Business vs. Leisure (1999-2004p/\$millions)



Total traveler spending in New Jersey reached over \$13 billion in 2004p. Surprisingly, the business segment helped this growth with an increase in spending of 12.5% over 2003 despite a decline in travel volume. The leisure segment also increased 2.0% to \$10.1 billion in 2004p.

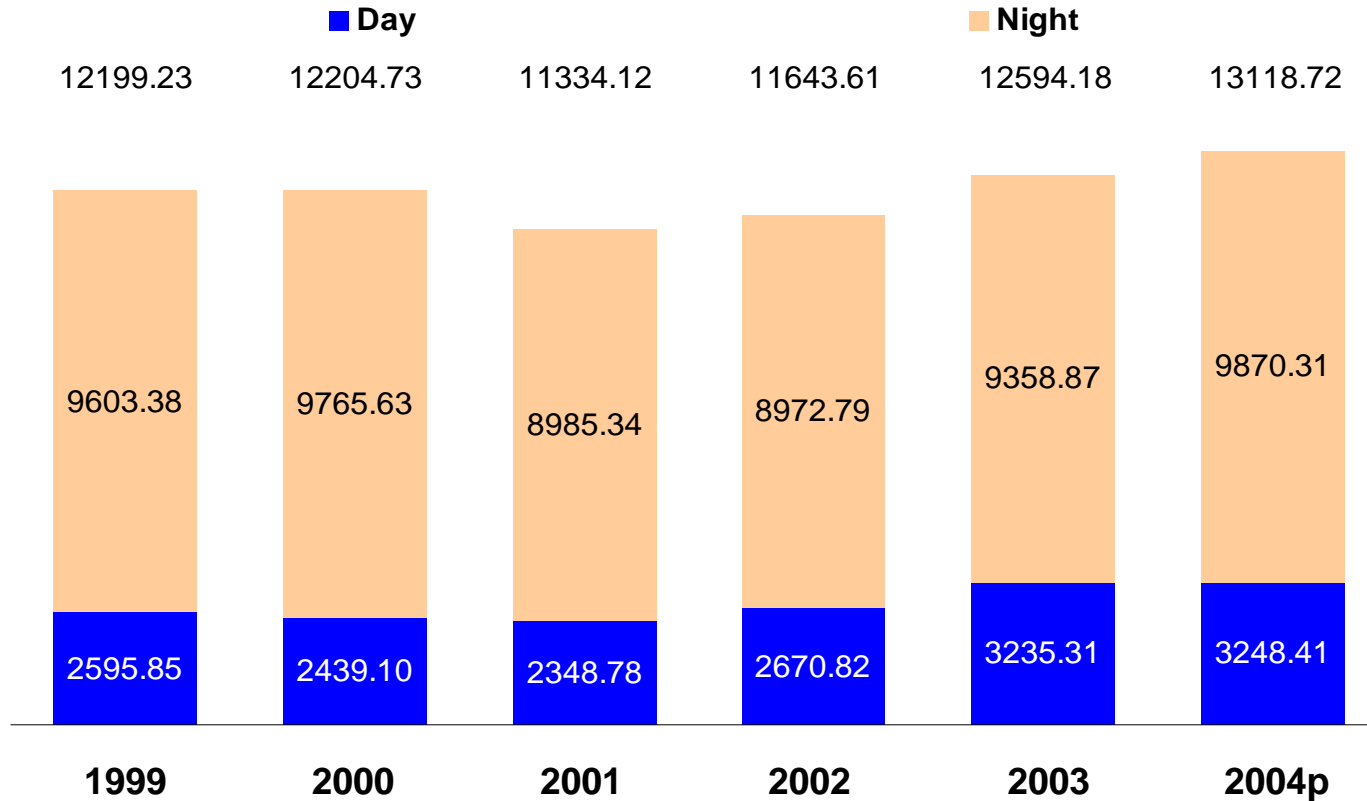




New Jersey Direct Spending: Day vs. Overnight (1999-2004p/\$millions)



While travel volume in the day-trip segment has increased in other measures, spending in this segment only increased marginally by 0.4%. The overnight segment grew 5.5% to reach a new high of \$9.8 billion.



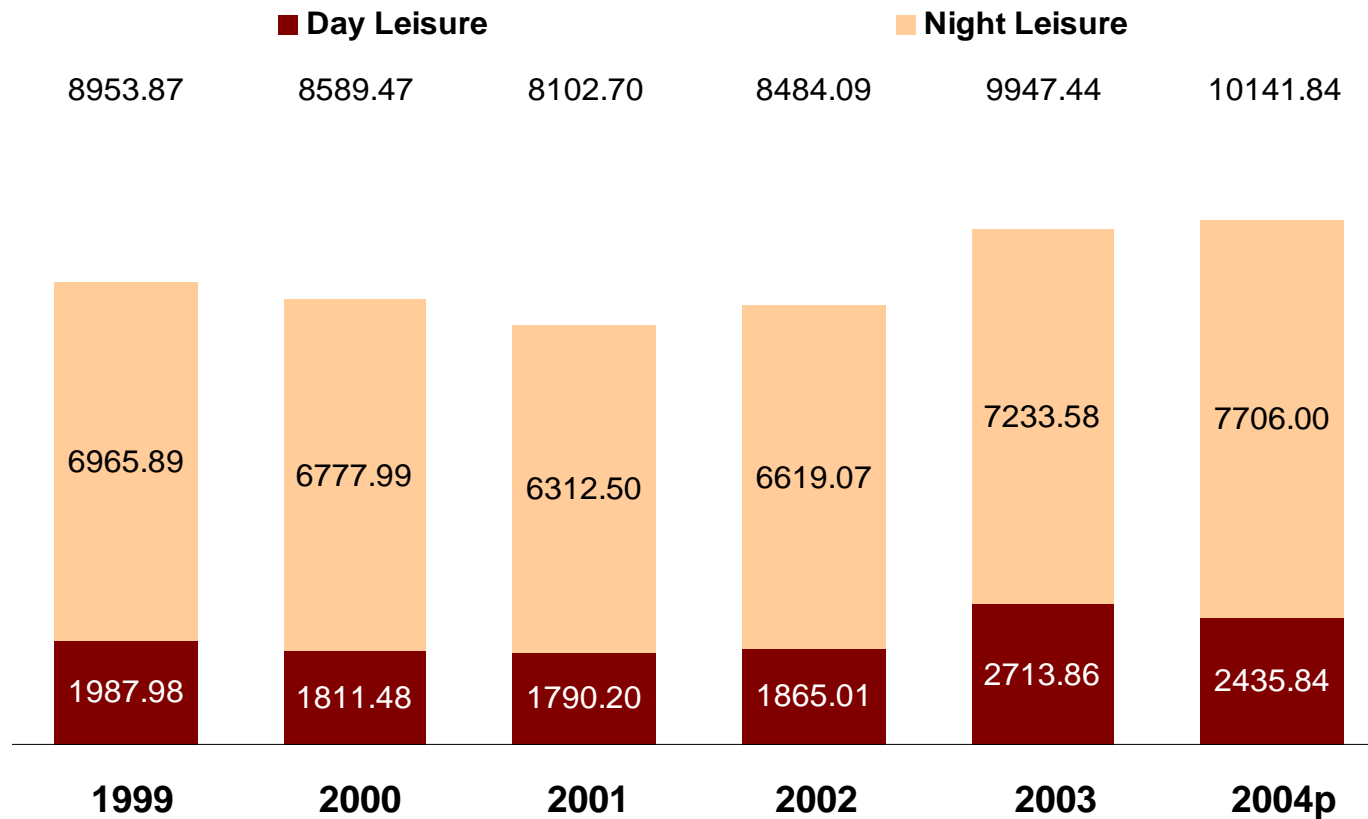
Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.



New Jersey Direct Spending: Day Leisure vs. Overnight Leisure (1999-2004p/\$millions)



The overnight leisure segment, which accounts for the majority of travel spending in the State of New Jersey, was the sole contributor to the 2.0% increase in leisure spending. Overnight leisure grew 6.5% in 2004p to \$7.7 billion while the day leisure segment receded 10.2% to \$2.4 billion.



Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.



New Jersey Traveler Direct Spending: % Change by Travel Segment



% Change 04/03

Total

New Jersey	4.2%
U.S.	8.5%

While New Jersey performance on travel party, person-trip, and person-day measures exceeded the U.S., direct spending performance in the State was below that of the U.S.

Leisure

New Jersey	2.0%
U.S.	9.5%

Total traveler spending increased 4.2% in New Jersey, compared to 8.5% at the national level.

Overnight Leisure

New Jersey	6.5%
U.S.	9.0%

Spending in the overnight leisure segment in New Jersey grew a strong 6.5% yet under the U.S. level of 9.0%



New Jersey Traveler Direct Spending Intelligence



- Total travel spending in New Jersey reached \$13 billion in 2004p, an increase of over 4%. The increase in spending was driven by the sheer increase in the volume of travel in the market. Conversely, the average party spending fell 1.6% in 2004p but did not lead to an adverse decline in total spending overall.
- While business travel volume declined in terms of travel parties, person-trips, and person-days, travel spending in the business segment increased a large 12.5%. Spending by business travelers in New Jersey reached almost \$3.0 billion in 2004p reversing three years of a decline in spending.
- Conversely, spending in the leisure travel segment in New Jersey experienced a third year of growth increasing 2.0% to \$10.1 billion in 2004p. The increase in leisure travel volume led to the growth in spending as spending per party and per traveler decreased in 2004p.
- Overnight leisure travel accounts for 59% of all travel spending in New Jersey and increased 6.5% from 2003 to 2004p. This increase was the sole reason for the increase in leisure spending as the day leisure segment fell 10.2%. Overnight leisure traveler spending totaled \$7.7 billion in 2004p.



New Jersey Share of U.S. Overnight Leisure Travel (2003 vs. 2004p)



New Jersey's share of U.S. overnight leisure travel volume ranges from a low of 1.97% for spending volume to a high of 2.36% for travel party volume. In all measures, New Jersey gained share of the overnight leisure travel market in the U.S.



Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.



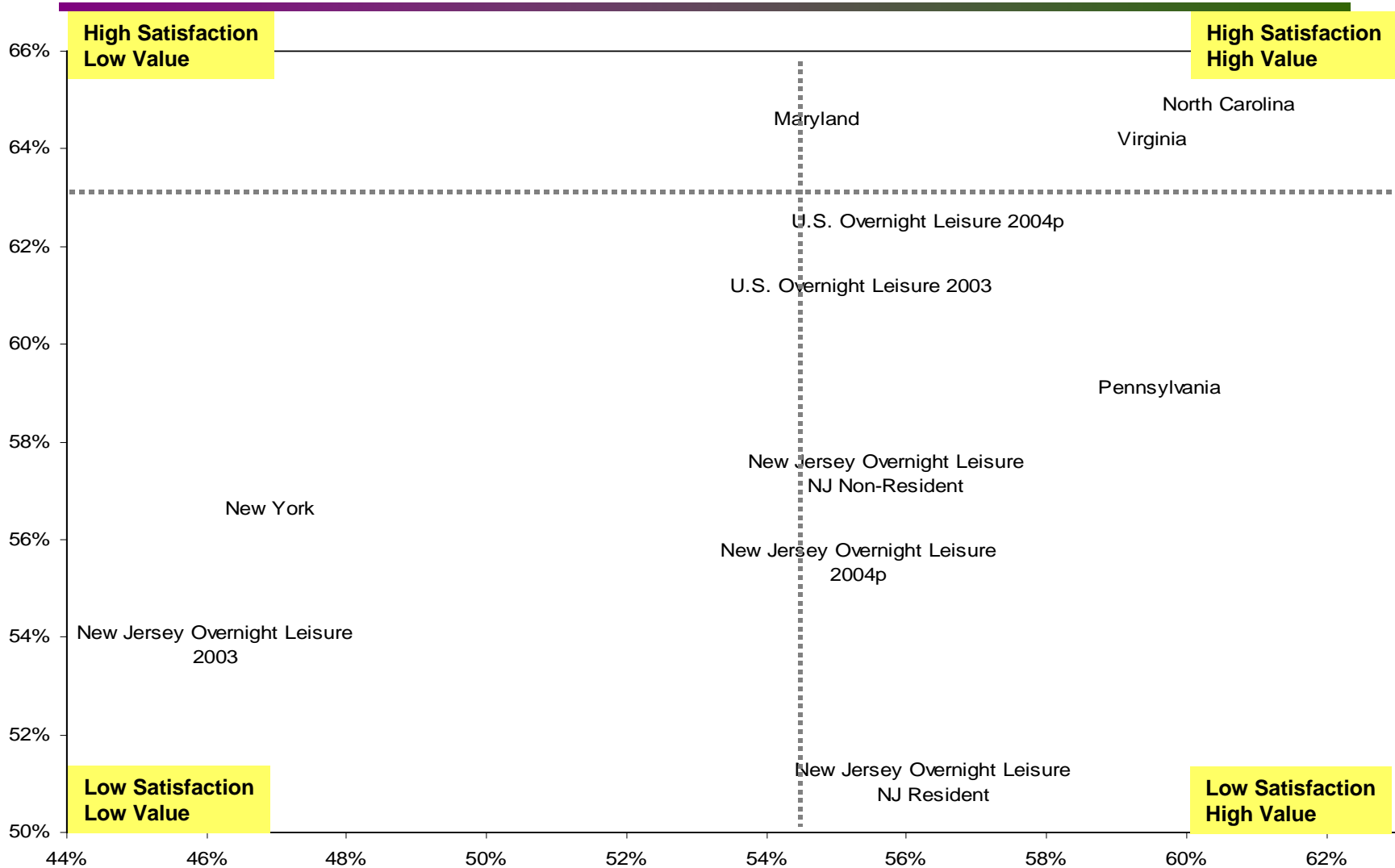
Destination Satisfaction and Value



- Travelers rate each city visited for overall satisfaction and overall value on a 10-point scale, where 1 is lowest or “poor” and 10 is highest or “excellent”.
- The following chart shows each destination’s satisfaction and value ratings. The chart plots the percentage of top three (net) high ratings on ten-point satisfaction and value scales.
- The chart is separated into four quadrants representing the four combinations of satisfaction and value scores--high satisfaction-high value, high satisfaction-low value, low satisfaction-high value, and low satisfaction-low value.
- Well over half of overnight leisure visitors to New Jersey rated their destination *excellent* in satisfaction. In fact, the share of visitors giving *excellent* ratings increased from 54% in 2003 to 56% in 2004p.
- Value ratings for New Jersey destinations increased dramatically in 2004p increasing from 46% of visitors giving *excellent* ratings in 2003 to the majority of visitors, 55%, giving *excellent* ratings in 2004p.
- Compared to the U.S., New Jersey value ratings are on par with national levels. However, in terms of satisfaction ratings, New Jersey is notably lower than the national average where 63% of visitors across the U.S. rate the destination excellent, compared to 56% of New Jersey visitors.
- Likewise, when comparing New Jersey to the competitive set, New Jersey receives lower satisfaction ratings but equitable value ratings.



Satisfaction vs. Value: New Jersey and Competitors (2003 vs. 2004p/Overnight Leisure/Person-trips)

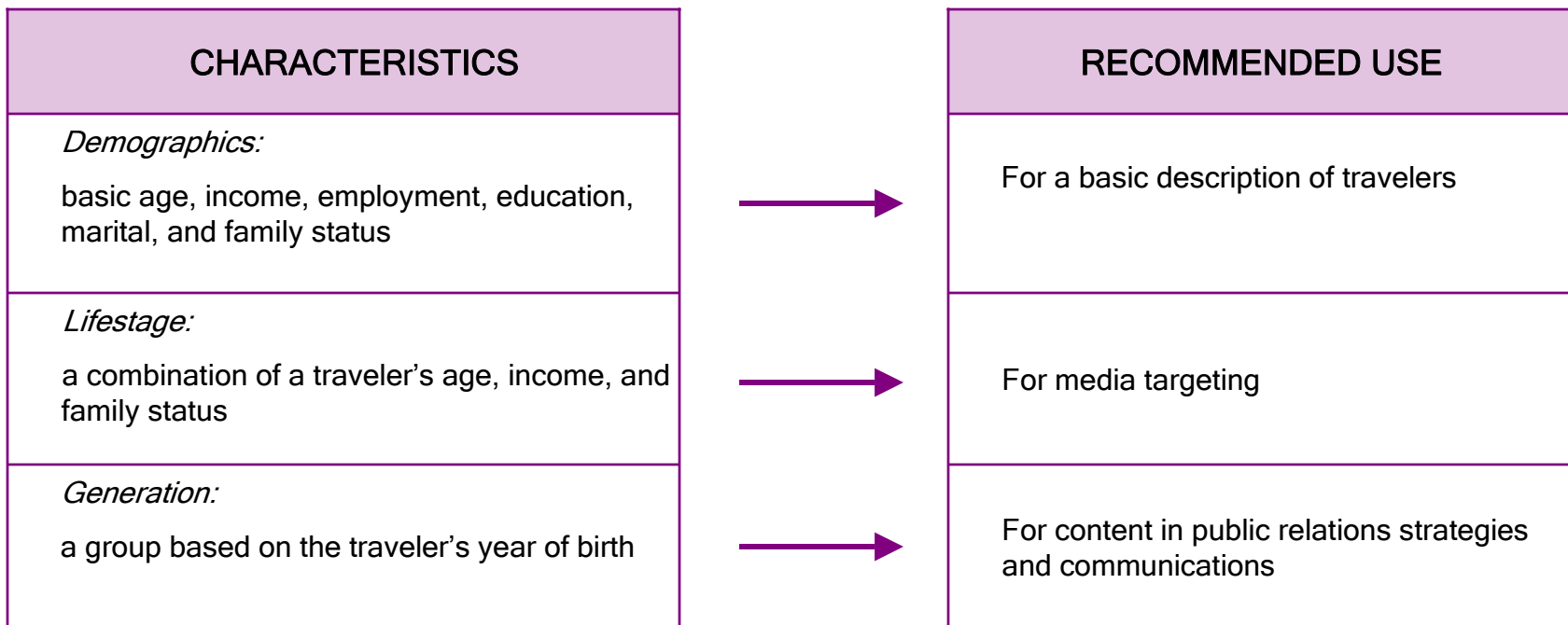


Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.





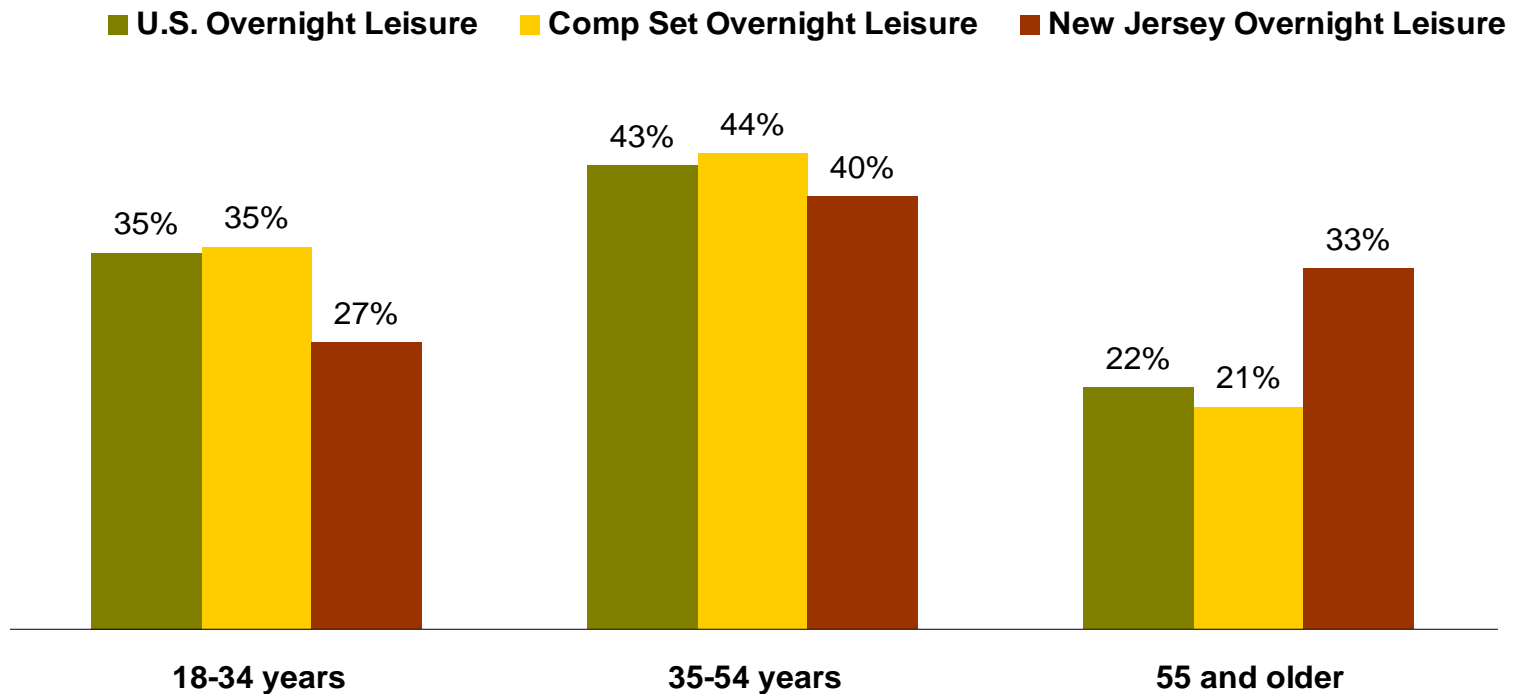
The following section provides various demographic analyses to help travel marketers and planners better target their communications. DKS&A will give the reader three ways to analyze traveler demographic profiles and the recommended use for marketing:



Age Distribution: U.S., Competitive Set, and New Jersey (2004p/Overnight Leisure/Person-trips)



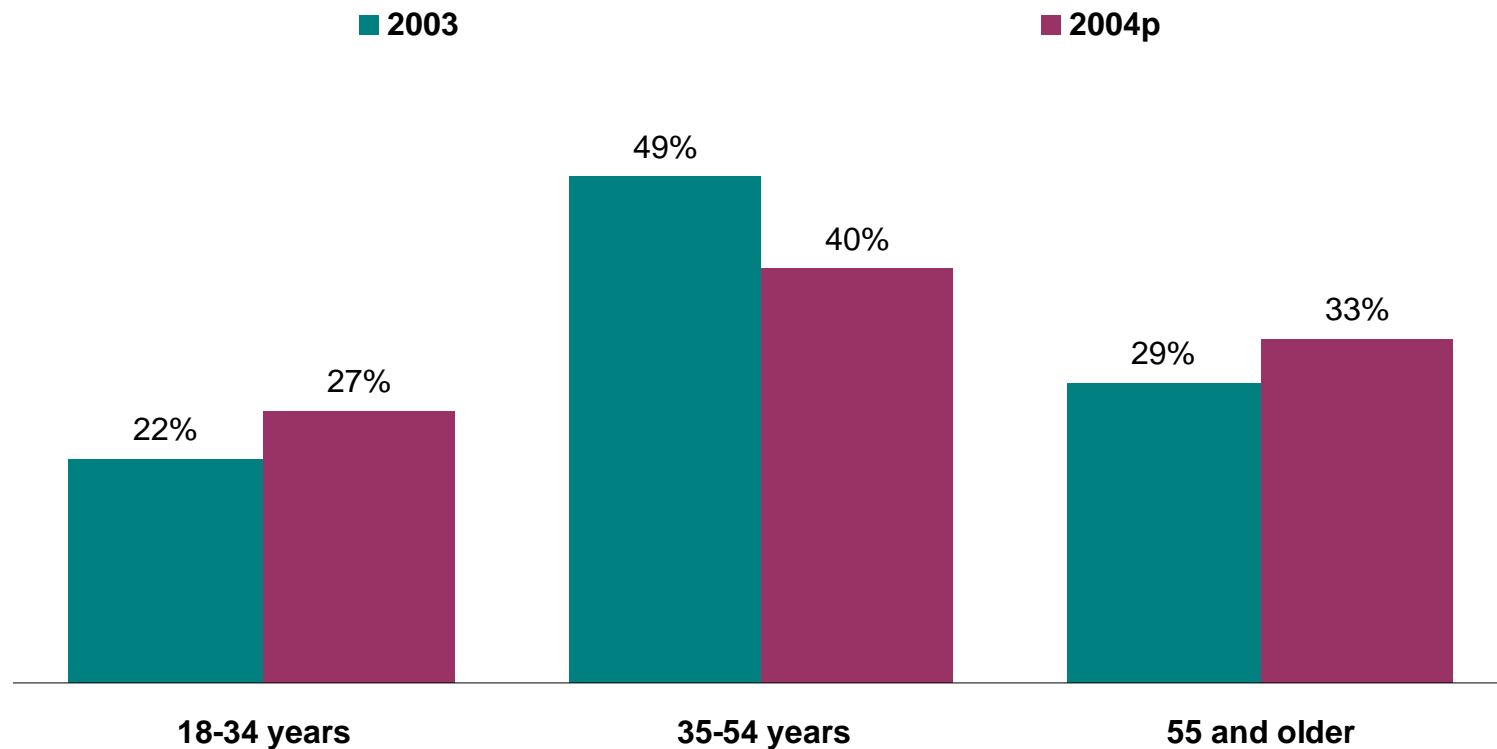
Compared to the U.S. and Competitive Set destinations, a higher proportion of New Jersey visitors are in the 55 years or older age group. However, the majority of overnight leisure visitors to New Jersey fall between 35-54 years of age.



New Jersey Age Distribution (2003 vs. 2004p/Overnight Leisure/Person-trips)



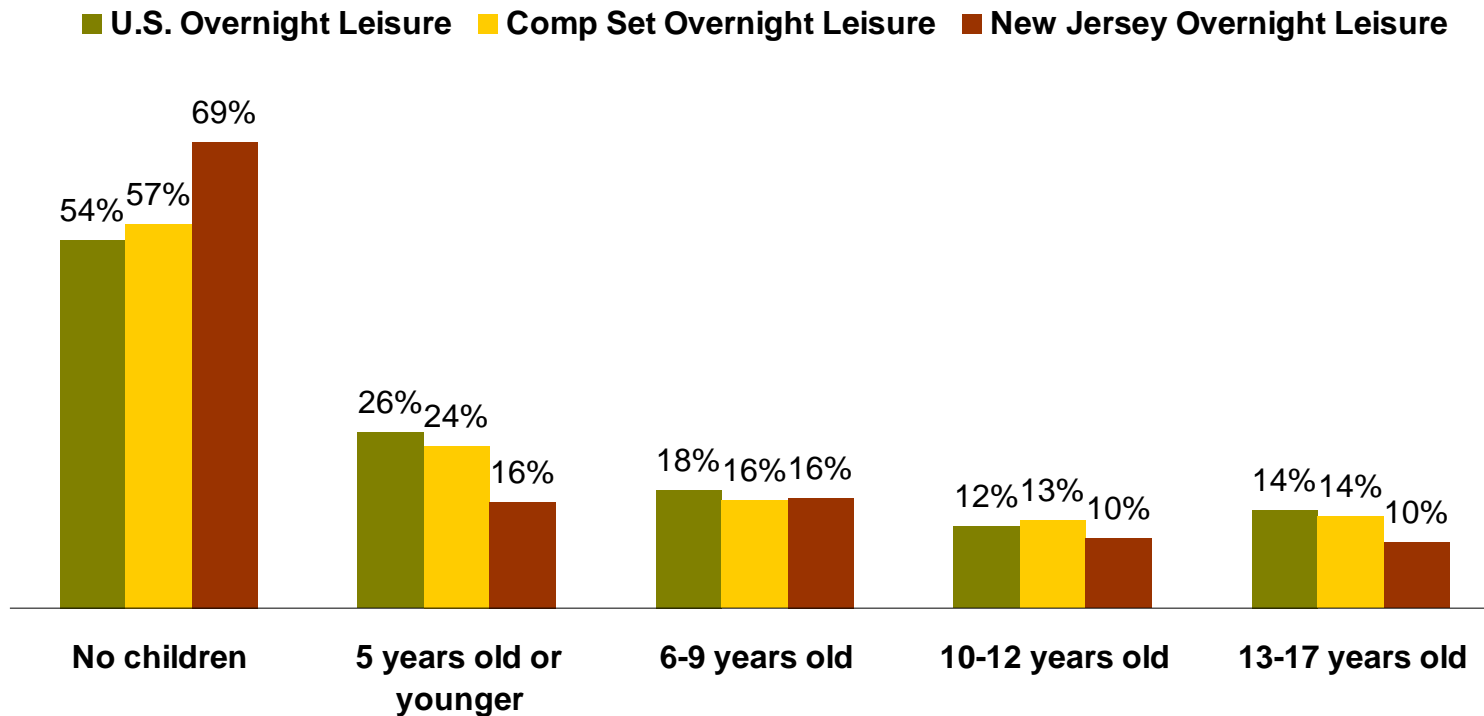
When evaluating changes from 2003, the proportion of overnight leisure visitors between 35 and 54 years of age decreased dramatically from 49% of visitors in 2003 to 40% in 2004p. While this change appears dramatic between 2003 and 2004p, this segment has always remained the largest segment over the past five years despite year over year shifts.



Distribution of Children in Household: U.S., Competitive Set, and New Jersey (2004p/Overnight Leisure/Person-trips)



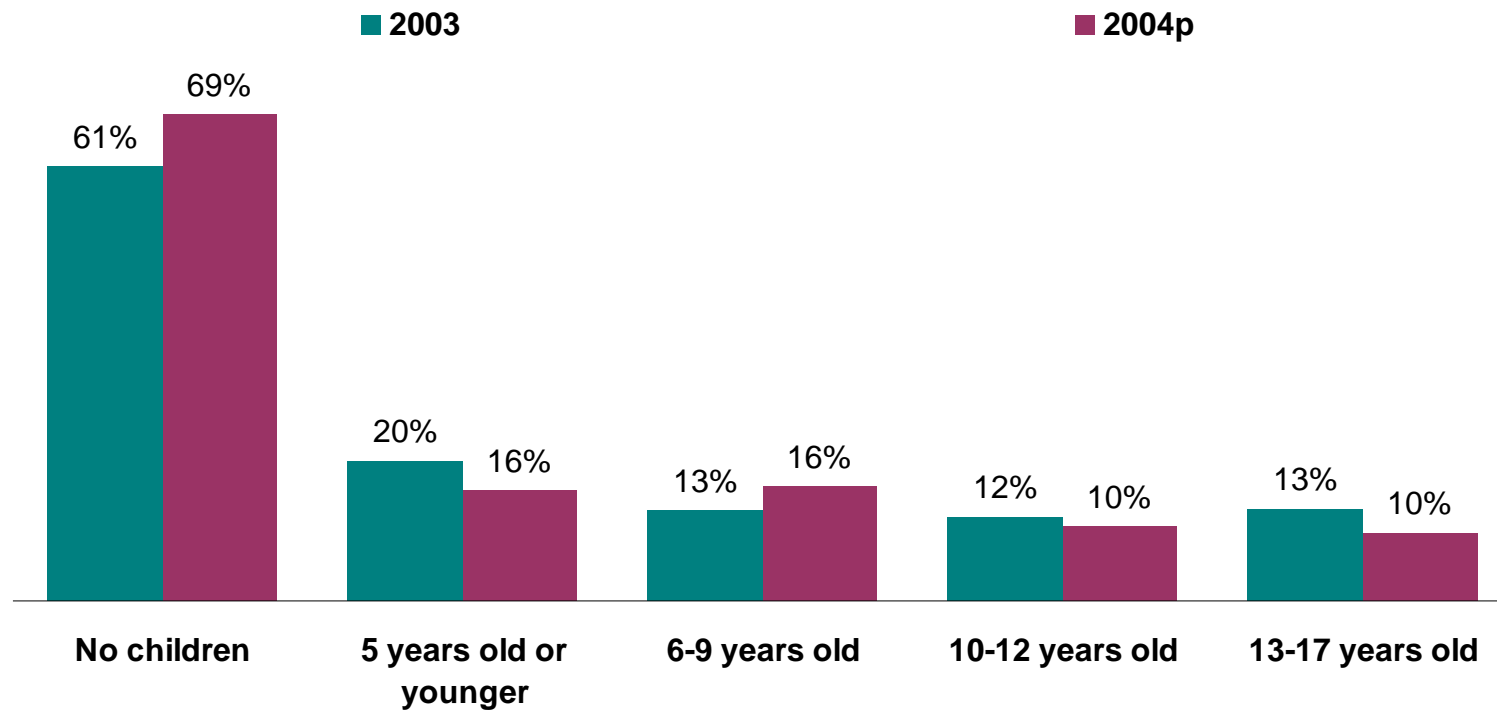
The vast majority of overnight leisure visitors to New Jersey do not have children under 18 in the household, comprising 69% of visitors. This is quite larger than the share of overnight leisure visitors with children in the household at the national level and within the competitive set.



New Jersey Distribution of Children in Household (2003 vs. 2004p/Overnight Leisure/Person-trips)



Over the last five years New Jersey has remained a destination for adults without children in the household. Between 2003 and 2004p, the share of this segment moved from 61% to 69%, the highest in five years.

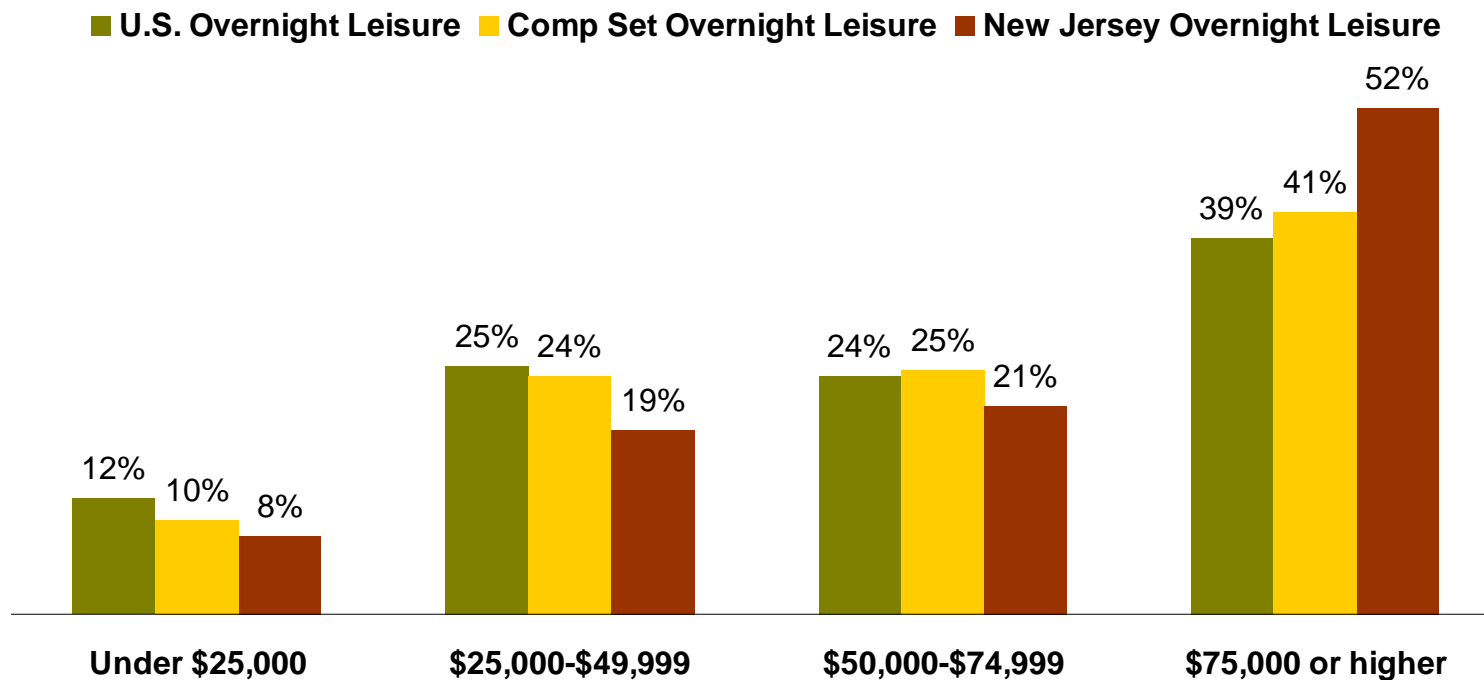




Annual Household Income Distribution: U.S., Competitive Set, and New Jersey (2004p/Overnight Leisure/Person-trips)



Over half, 52%, of overnight leisure visitors to New Jersey have incomes of over \$75,000 a year. This is notably different from U.S. and competitive set levels where only 39% and 41% of overnight leisure have high incomes.

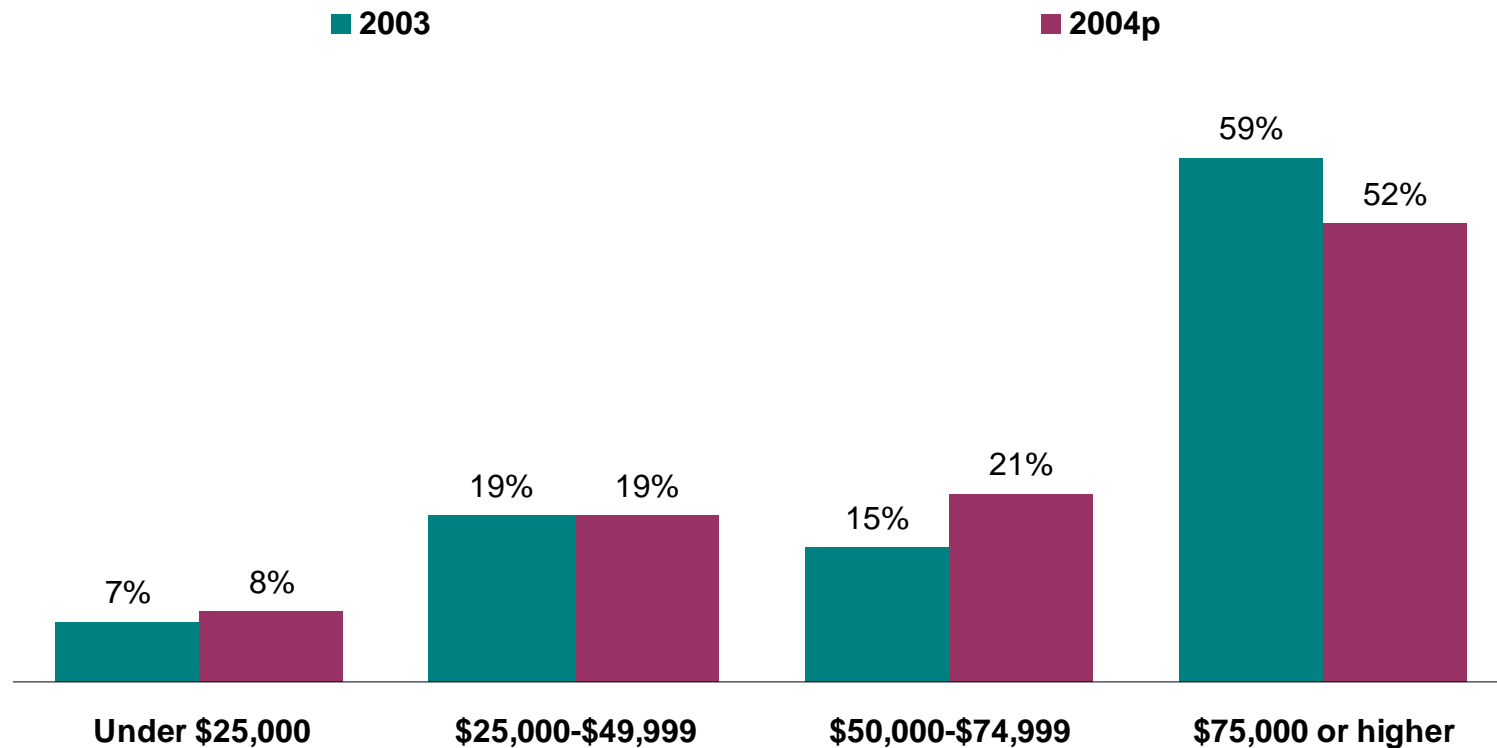


Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.

New Jersey Annual Household Income Distribution (2003 vs. 2004p/Overnight Leisure/Person-trips)



The median income of overnight leisure visitors to New Jersey has risen steadily from \$64,800 a year in 2000 to \$83,600 a year in 2003. In 2004p, the median income of visitors decreased to \$77,400 annually as revealed in a drop in share from 59% to 52% of visitors with incomes over \$75,000 a year.





DKS&A's lifestage analysis began in 2001 and continues in this report. Lifestage analysis combines three variables

- 1) age
- 2) household income, and
- 3) presence of children in the household

into one variable containing seven mutually-exclusive segments defined below. Because of the age component, the lifestage segments are "moving targets" from year to year.

Age: 18-34 Age of the household head.

- 1) Free No children under 18 in the household
- 2) Family One or more children under 18 in the household.

Age: 35-54 Age of the household head.

- 3) Free No children under 18 in the household
- 4) Lo Fmly Annual household income under \$50K and one or more children under 18 in the household.
- 5) Hi Fmly Annual household income \$50K or higher and one or more children under 18 in the household.

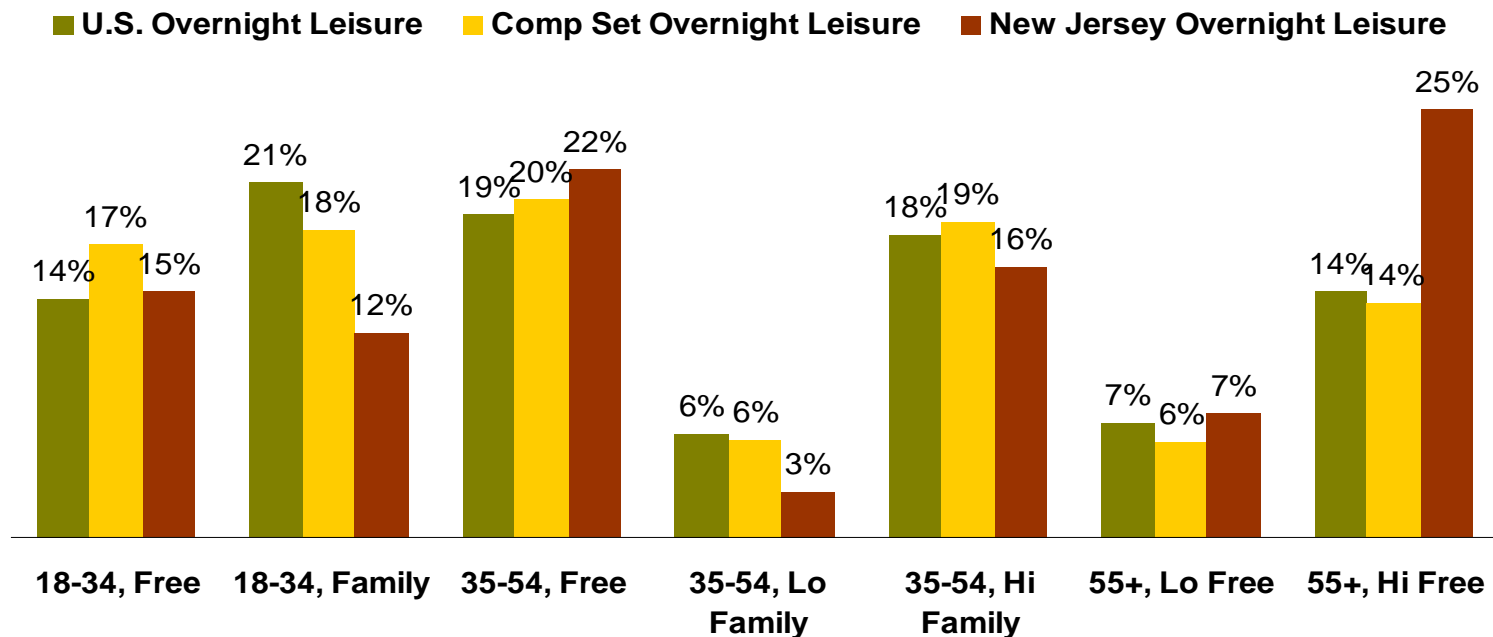
Age: 55+ Age of the household head.

- 6) Lo Free Annual household income under \$50K and no children under 18 in the household.
- 7) Hi Free Annual household income \$50K or higher and no children under 18 in the household.

Lifestage Distribution: U.S., Competitive Set, and New Jersey (2004p/Overnight Leisure/Person-trips)



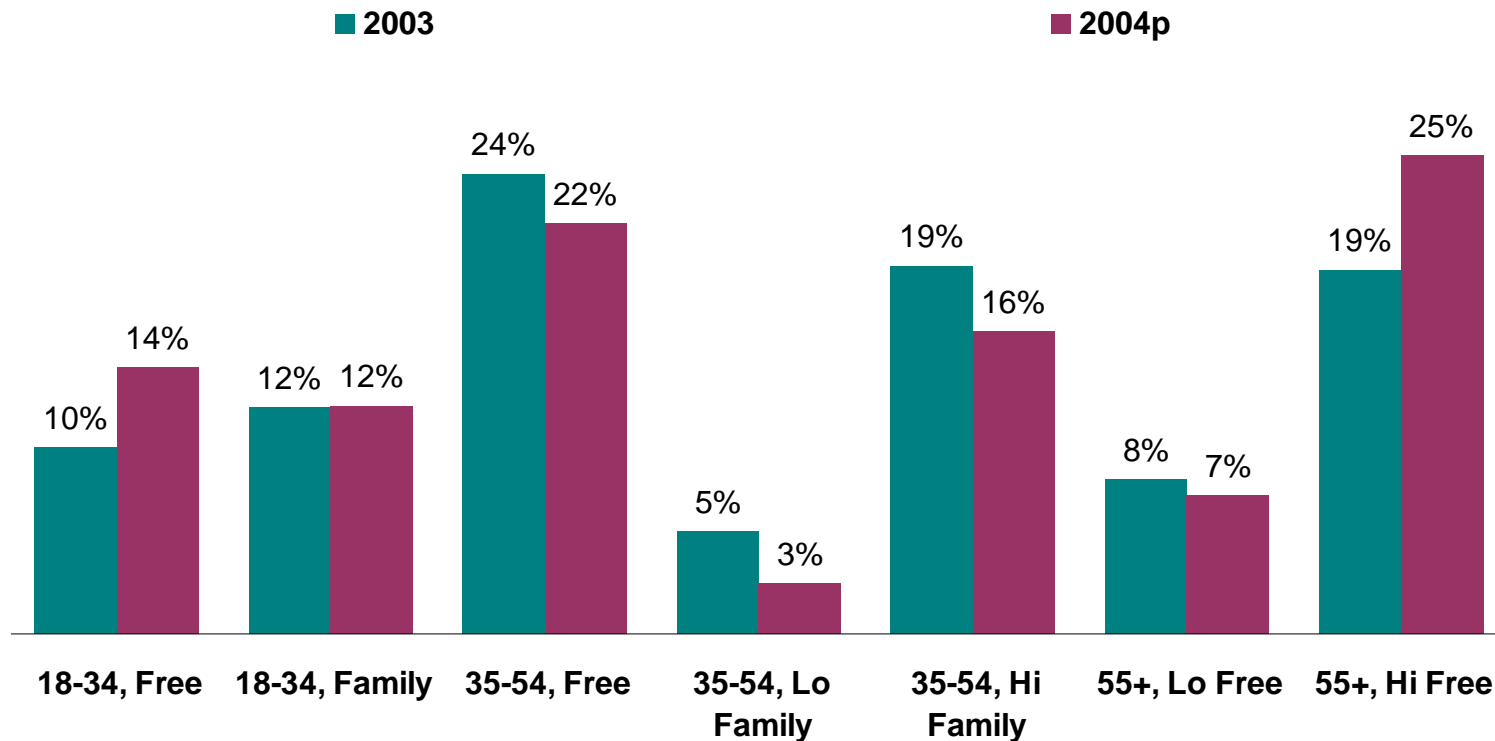
When evaluating overnight leisure visitors to New Jersey by lifestage segments, the State hosts a large majority of visitors in the 55+, Hi Free cohort, 25%. This proportion of visitors is notably higher than the U.S. and competitive set levels which are only at 14%. Compared to the U.S. and competitive set, New Jersey is least likely to attract families as the proportion of families in the U.S. and competitive set are much higher than in New Jersey.



New Jersey Lifestage Distribution (2003 vs. 2004p/Overnight Leisure/Person-trips)



The share of visitors in the 55+, Hi Free segment has grown over the last five years ranging from 15% of the market to 25% in 2004p, accounting for the largest share of visitors for the first time. The 35-54, Free lifestage has typically been the primary lifestage but in 2004p has fallen to the second largest segment among New Jersey overnight leisure visitors.





Traveler Generation Analysis



With an increasing interest in generational behavior, DKS&A has added a Traveler Generation Analysis to help destinations understand the composition of their visitors in terms of the generations they represent. The analysis will supplement other demographic profiles (age and lifestage) by adding a means to target marketing messages to various generational segments.

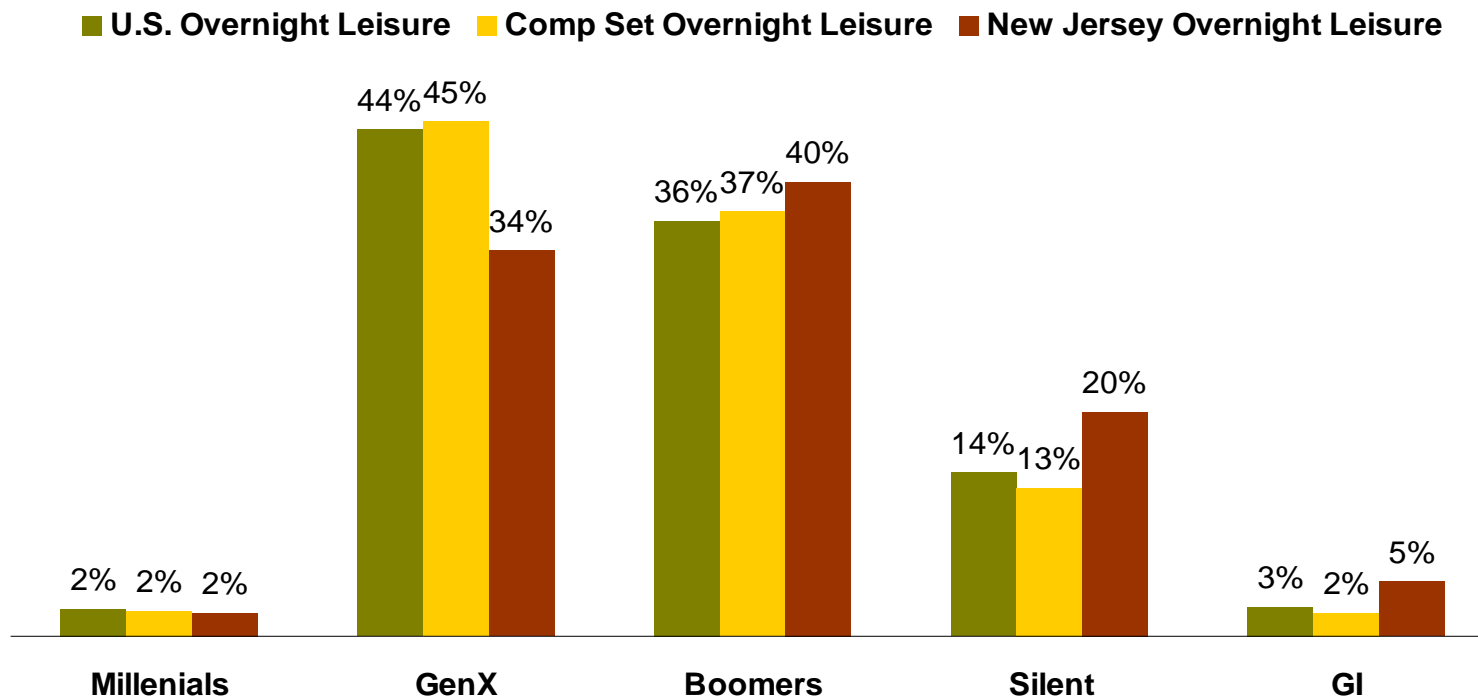
The following defines the generations by year of birth:

Millennial	After 1981
Gen X	1965-1980
Boomers	1946-1964
Silent	1930-1945
GI	1929 and earlier

Traveler Generation Distribution: U.S., Competitive Set, and New Jersey (2004p/Overnight Leisure/Person-trips)



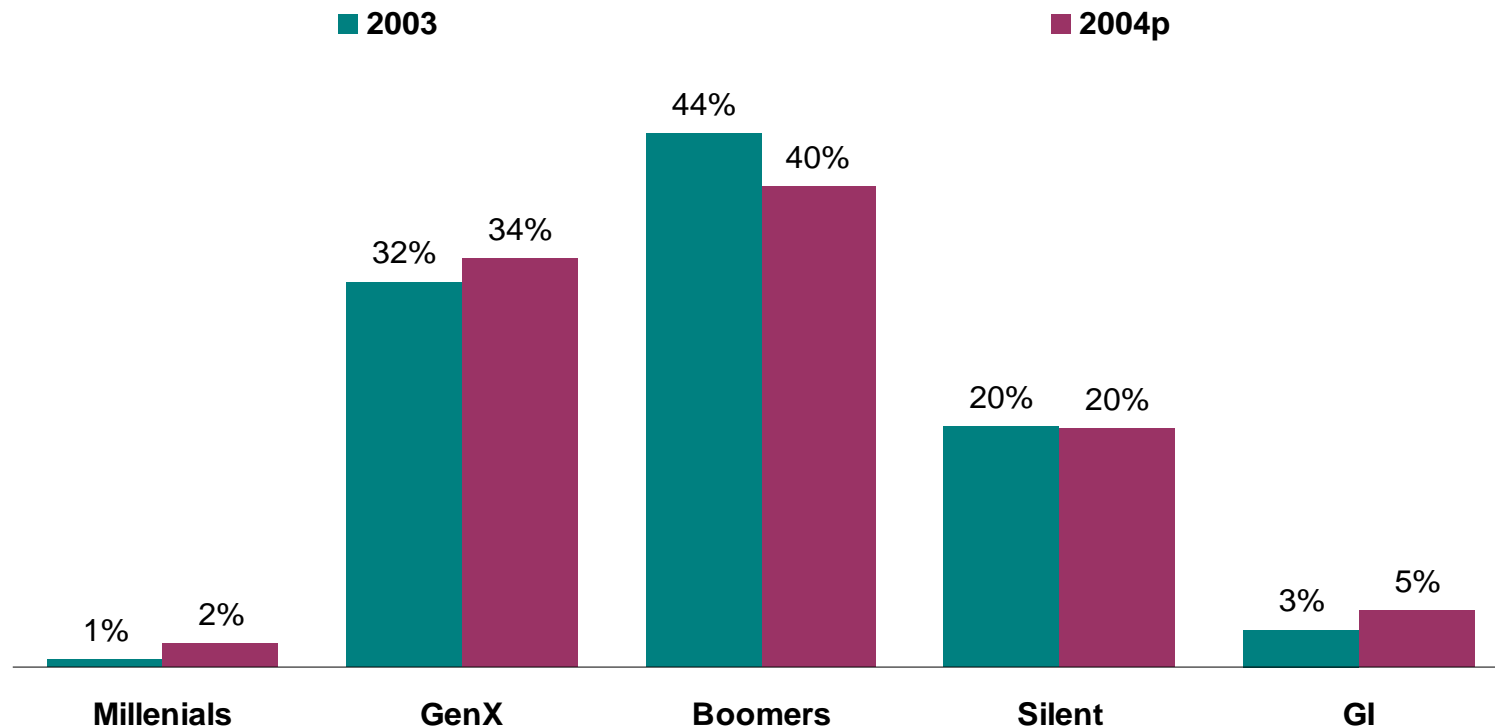
The Boomer generation accounts for the majority of overnight leisure visitors to New Jersey representing 40% of the market. New Jersey excels against the competition in attracting this market as well as the Silent generation. GenX travelers, which is New Jersey's secondary market, are more likely to visit the competition representing 45% of their market and only 34% of New Jersey's market.



New Jersey Traveler Generation Distribution (2003 vs. 2004p/Overnight Leisure/Person-trips)



The Boomer generation accounted for 44% of overnight leisure travelers to New Jersey in 2003 but dropped to 40% in 2004p. The Boomer generation has remained the primary market in New Jersey for five years, ranging from 40-46% of the overnight leisure market.





Targeting Intelligence Summary



- In describing New Jersey's overnight leisure travel market in terms of demographics, New Jersey travelers are predominantly middle-aged, with high incomes, and have no children in the household:
 - 40% of overnight leisure visitors to New Jersey are between the ages of 35-54.
 - 69% of overnight leisure visitors to the State do not have children in the household.
 - 52% of overnight leisure visitors in New Jersey have incomes of over \$75,000. The median income was \$77,400 in 2004p.
- When combining these demographics into unique segments, lifestages, New Jersey has two key targets:
 - 25% of overnight leisure visitors to New Jersey fall in the 55+, Hi Free lifestage.
 - 22% of overnight leisure visitors to the State are in the 35-54, Free lifestage.
- Another alternative way to segment the overnight leisure travel market is by generations:
 - 40% of overnight leisure travelers in New Jersey are Boomers
 - GenX is the secondary generation segment in New Jersey, accounting for 34% of overnight leisure travel.



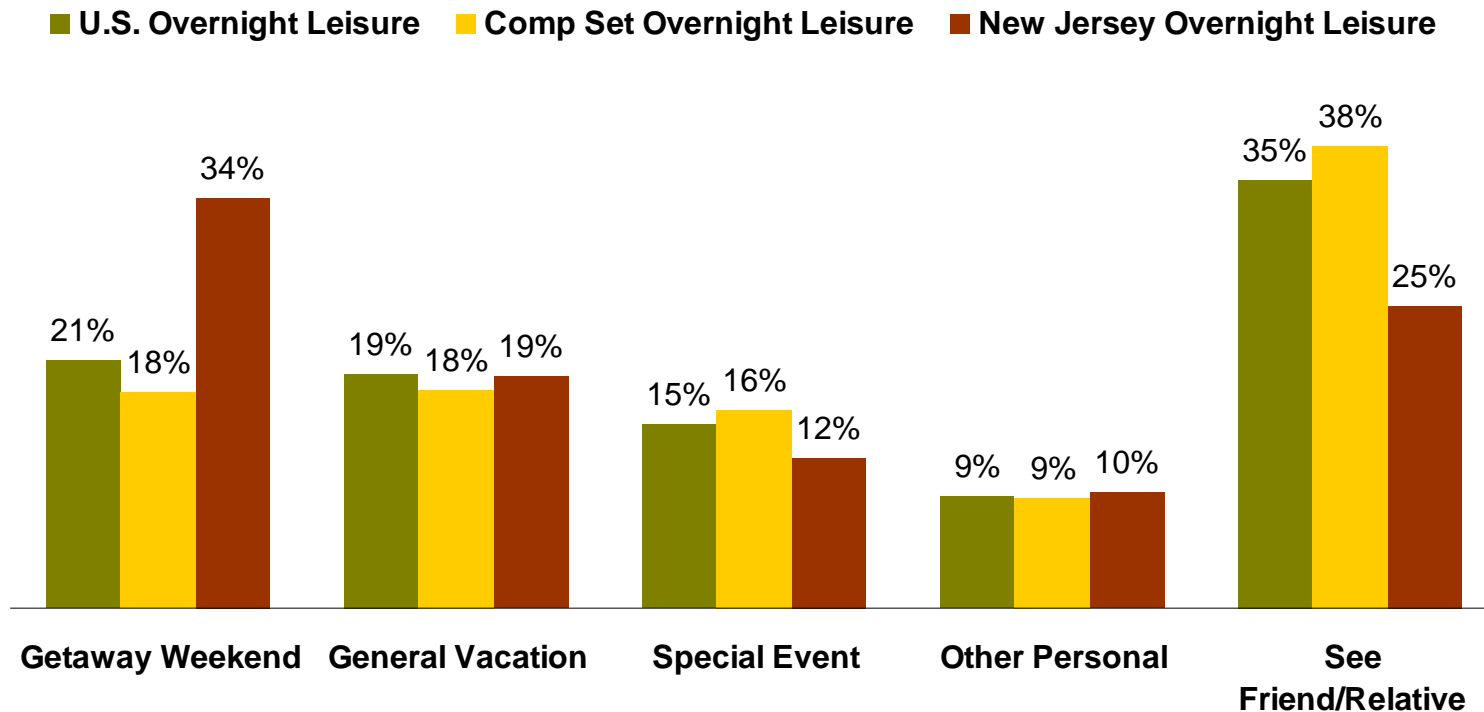


- The Positioning section will help a destination compare its tourism product attributes against the competition. These attributes include a traveler's purpose of visit, travel party composition, activities participated in at the destination, and repeat visitation. This intelligence highlights a destination's 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.
- The following bullet points will define some details that will be found in the Positioning section
 - *See Friend/Relative* is a visitor's purpose of stay and represents visiting friends and relatives.
 - Travel party composition
 - *Family* travel parties is defined as one or more adults accompanied by one or more persons under age 18. The child does not necessarily have to live in the household.
 - *MM/FF* travel parties include either two females or two males from different households traveling together

Purpose of Stay Distribution: U.S., Competitive Set, and New Jersey (2004p/Overnight Leisure/Person-trips)



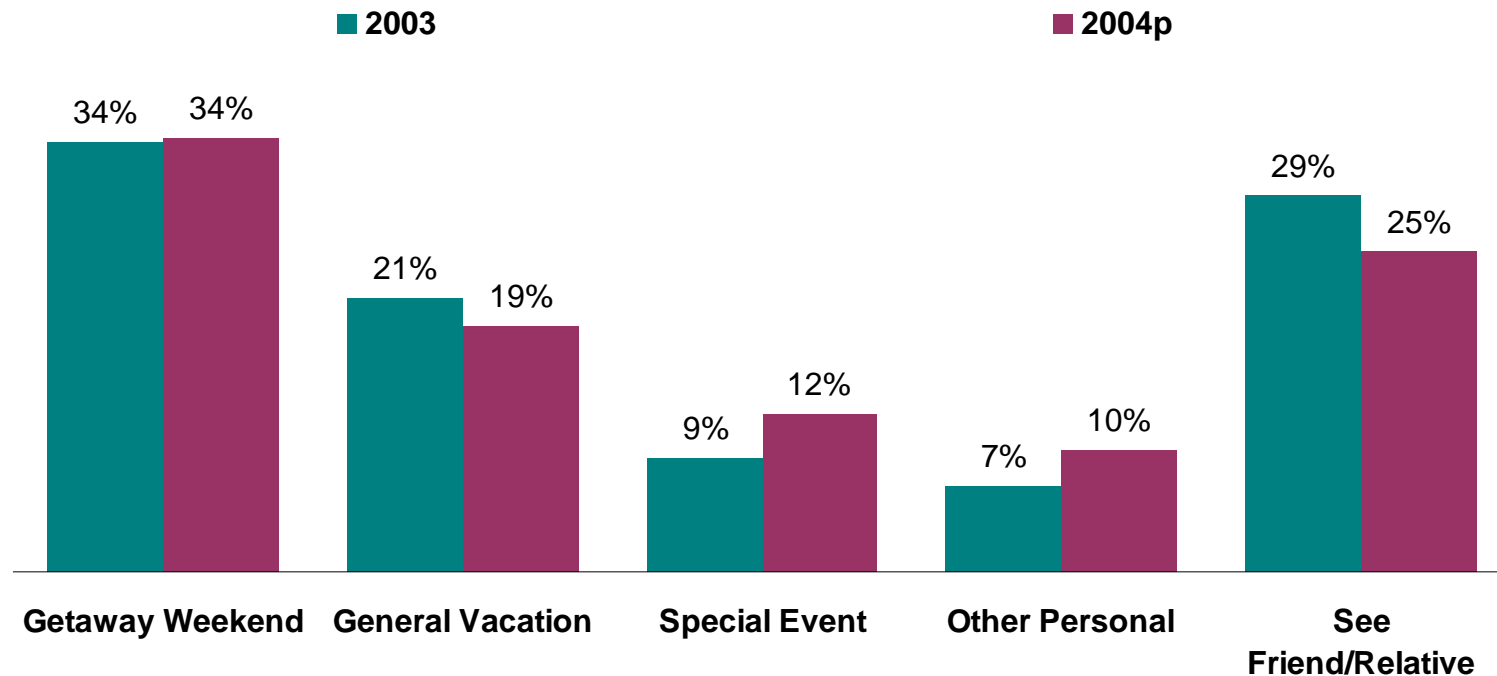
New Jersey attracts a large majority of overnight leisure visitors that take getaway weekends, 34%, significantly higher than the U.S. and competitive set. Travelers who visit friends and relatives account for the second highest share of overnight leisure visitors to the state, 25%, however significantly lower than the U.S. and competitive set.



New Jersey Purpose of Stay Distribution (2003 vs. 2004p/Overnight Leisure/Person-trips)



Between 2003 and 2004p, there was a slight increase in the proportion of overnight leisure visitors that visited New Jersey for a special event and other personal reasons.

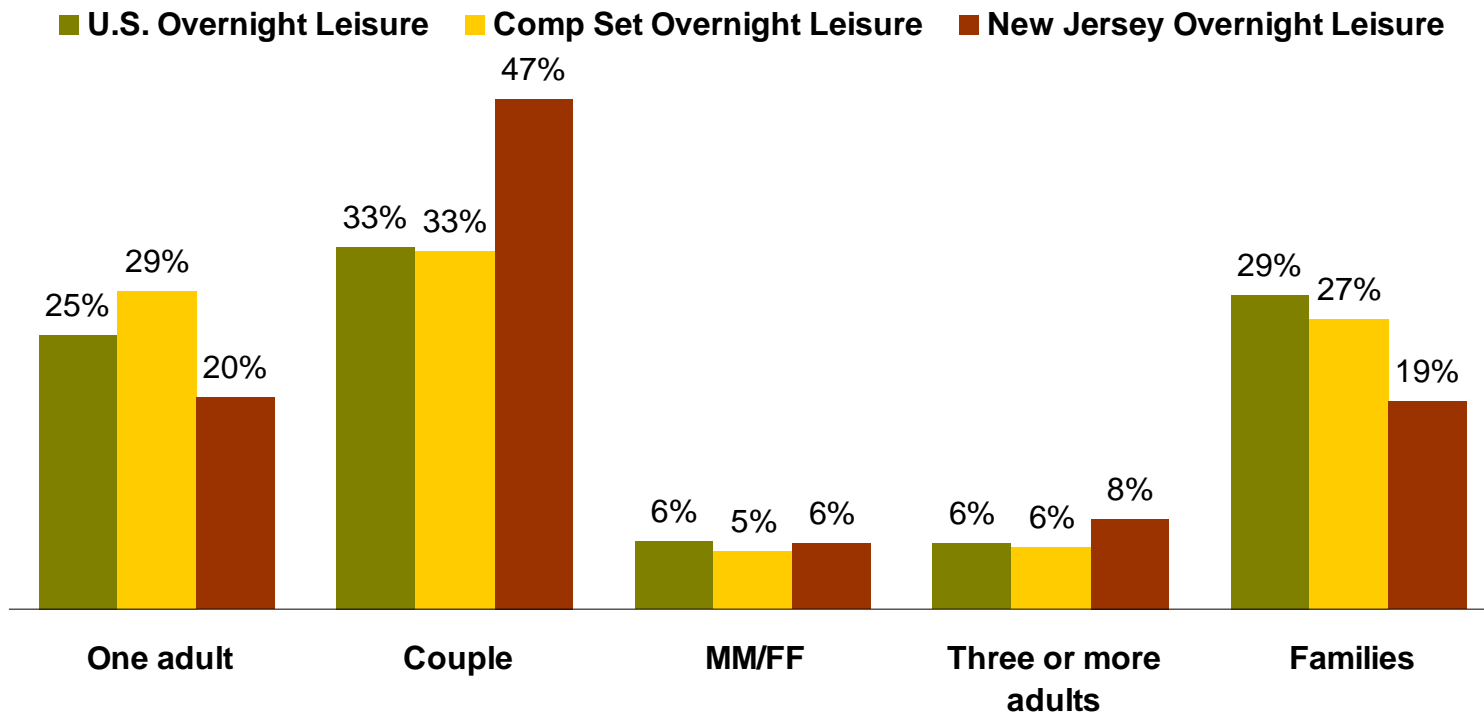




Party Composition Distribution: U.S., Competitive Set, and New Jersey (2004p/Overnight Leisure/Travel Parties Weight)



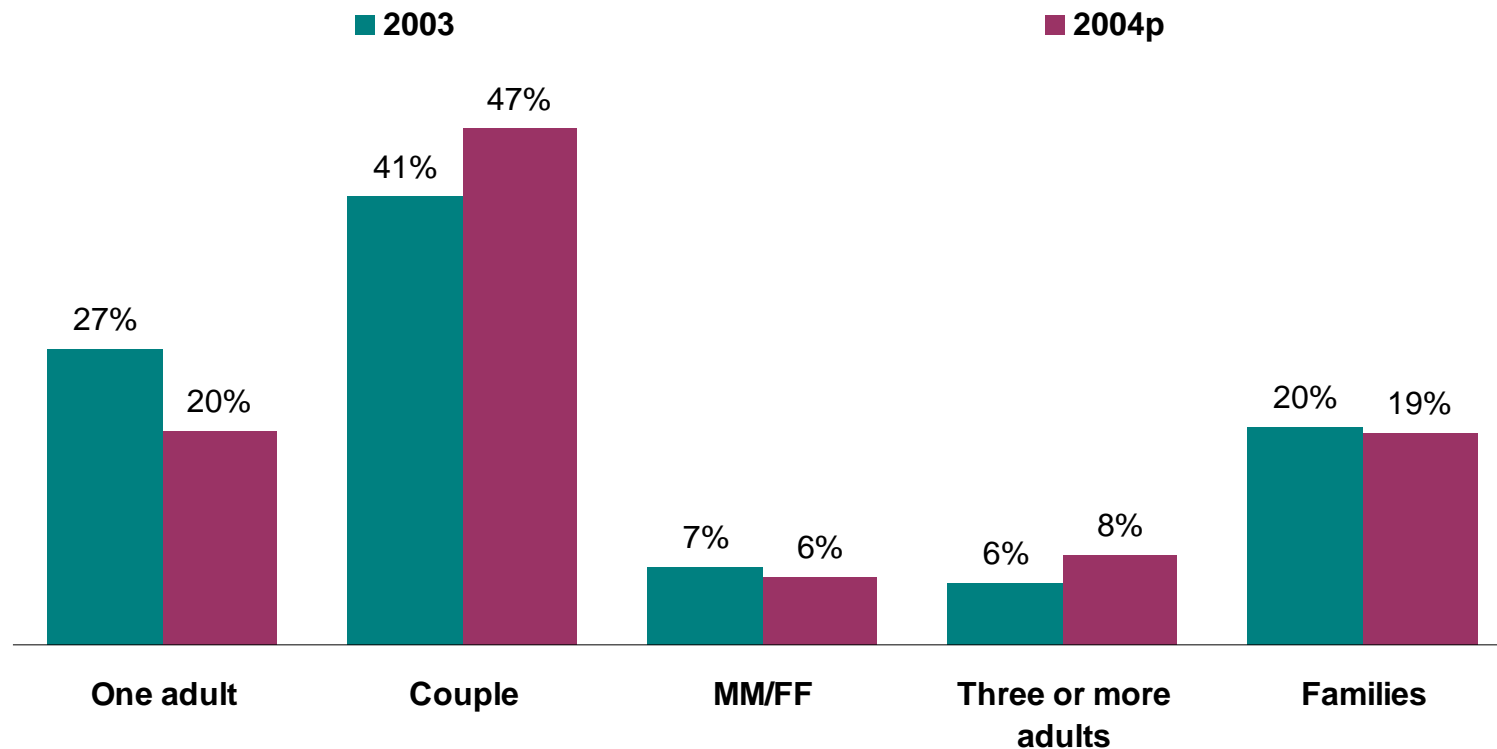
Almost half of overnight leisure visitors to New Jersey travel as a couple, accounting for 47% of the market. This is significantly higher than the U.S. and competitive set levels which only host 33% of visitors that travel as a couple. Families and adults traveling alone account for the second highest share of visitors to the state.



New Jersey Party Composition Distribution (2003 vs. 2004p/Overnight Leisure/Travel Parties Weight)



Over the last five years, the share of couples traveling to New Jersey for overnight leisure ranged from 40% to 47%. In 2004p, the share of couples reached a high of 47% of visitors, nearly half of all overnight leisure visitors.

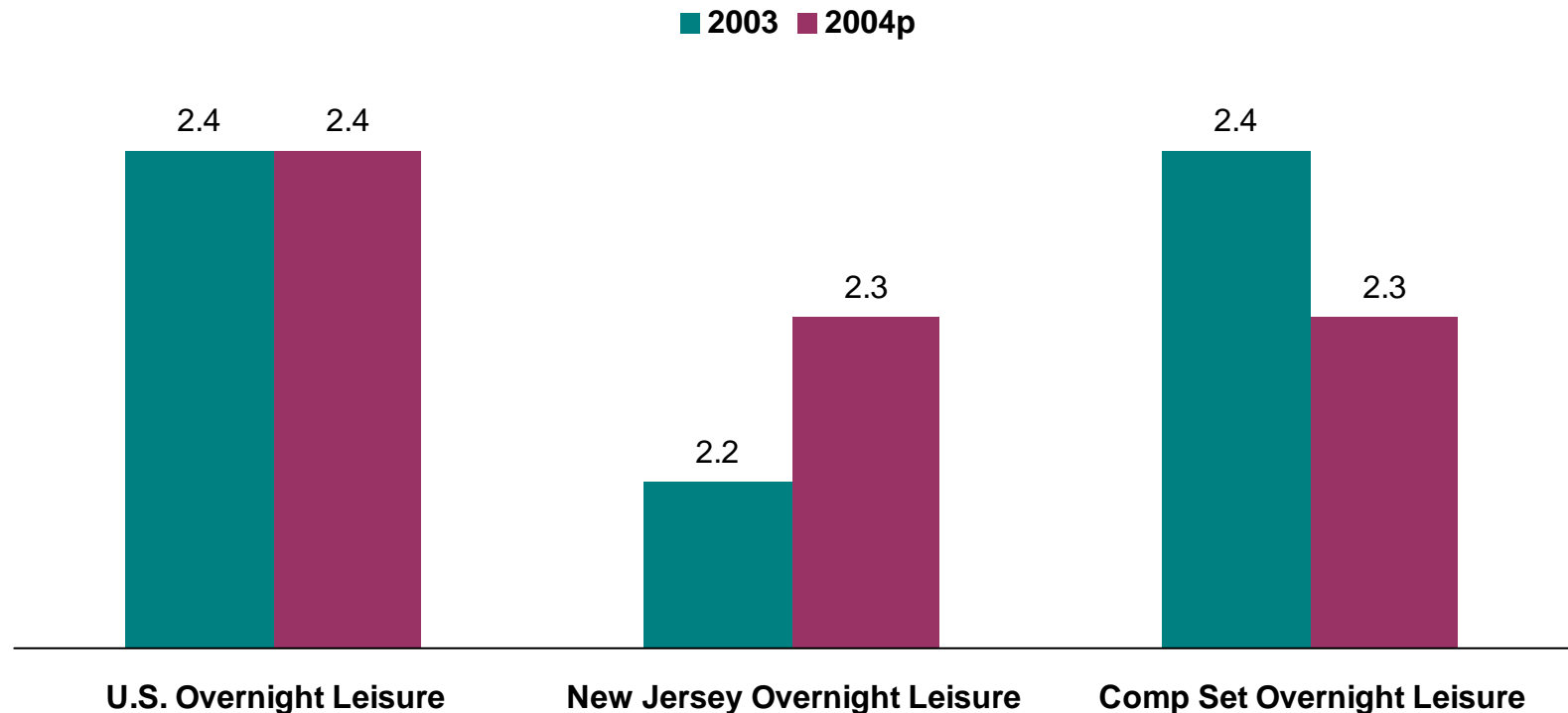




Average Party Size: U.S., Competitive Set, and New Jersey (2003 vs. 2004p/Overnight Leisure/Travel Parties Weight)



The average party size among overnight leisure visitors to New Jersey increased in 2004p from 2.2 to 2.3 persons per party. The average party size in New Jersey is lower than the U.S. average but equivalent to the competitive set.

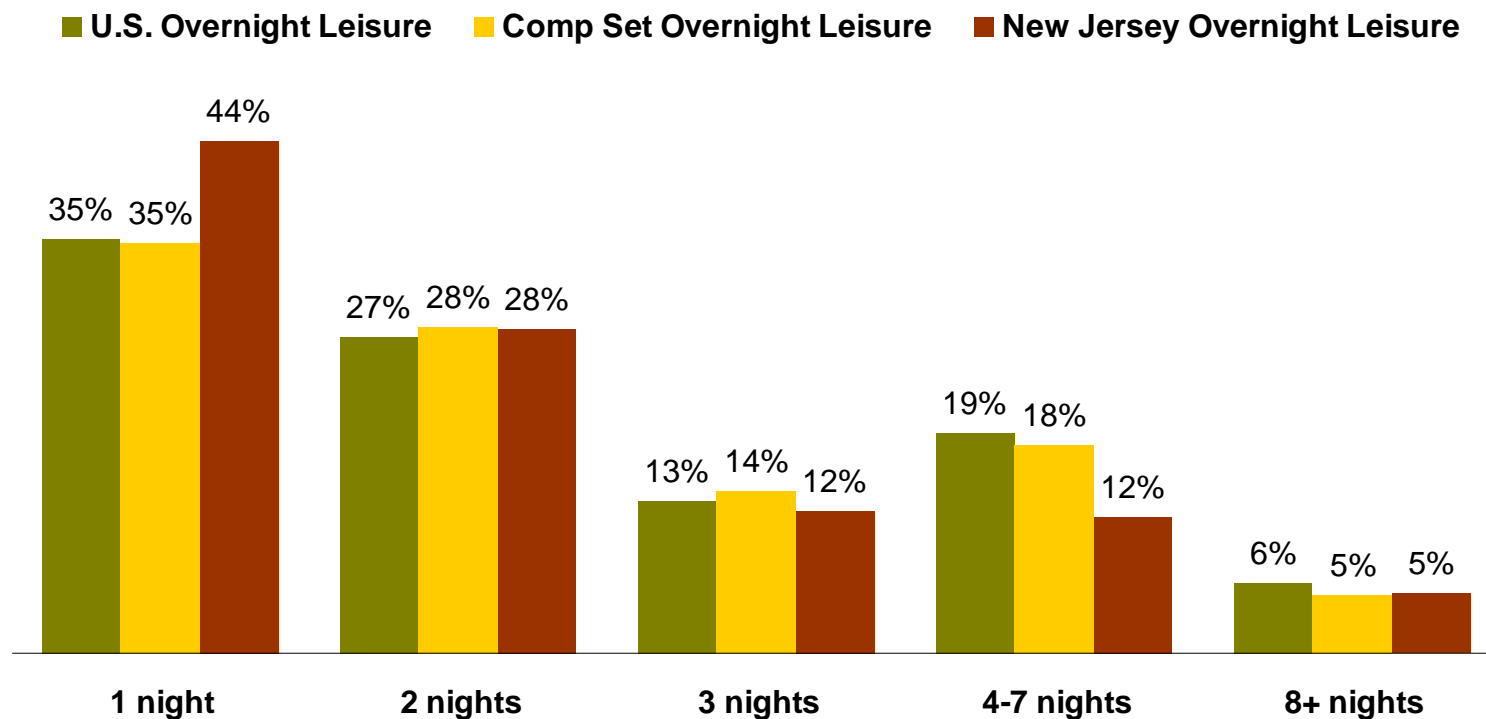


Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.

Stay Length Distribution: U.S., Competitive Set, and New Jersey (2004p/Overnight Leisure/Person-trips)



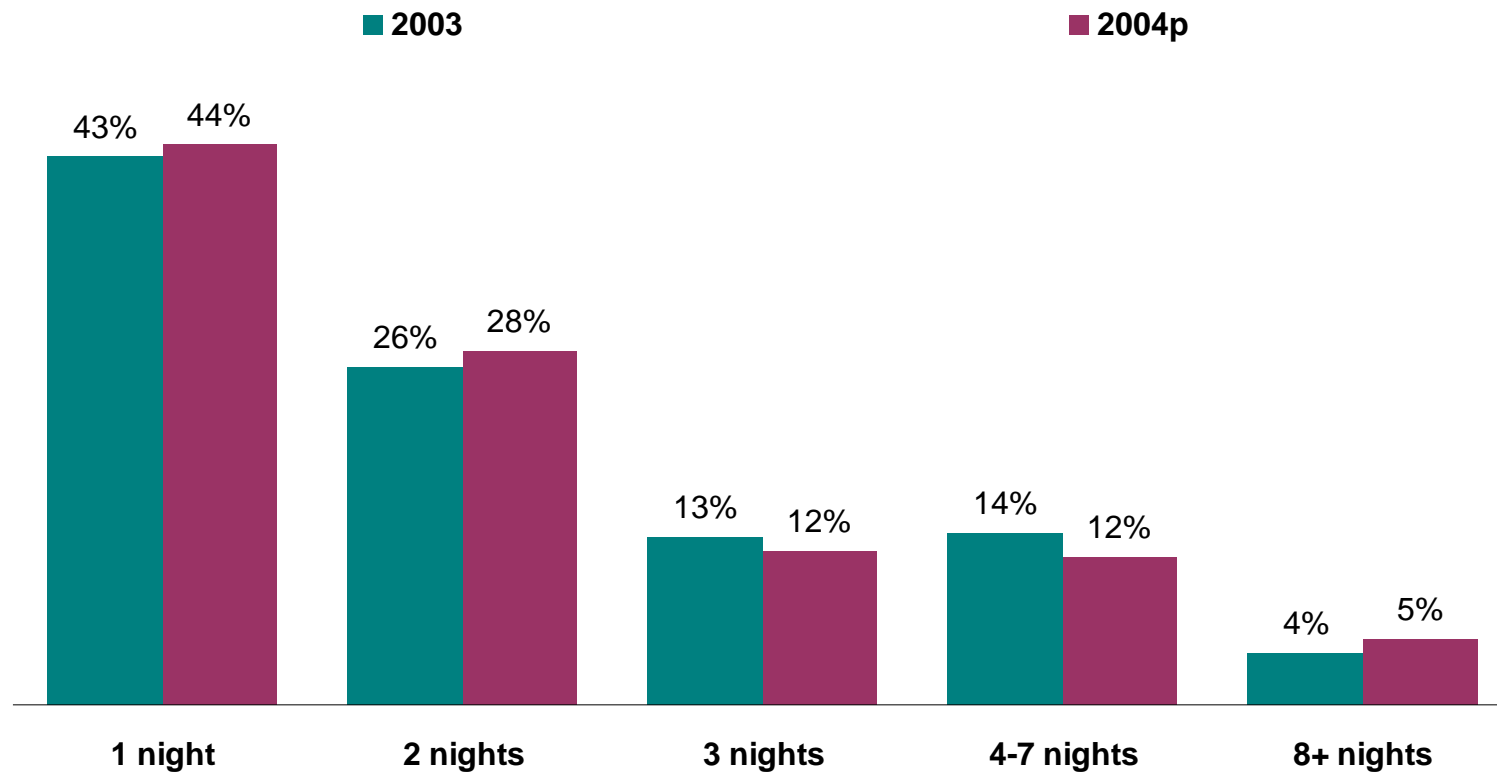
As indicated earlier, the majority of overnight leisure visitors to New Jersey visited the State on a weekend getaway. As a result, a large proportion of visitors stay in New Jersey for one or two nights. Of particular note is the relatively large share of visitors in New Jersey that only stay one night, 44%, compared to the U.S. and competitive set levels, 35% each.



New Jersey Stay Length Distribution (2003 vs. 2004p/Overnight Leisure/Person-trips)



The average length of stay of overnight leisure travelers in New Jersey decreased from 2.6 nights in 2003 to 2.5 nights in 2004p.

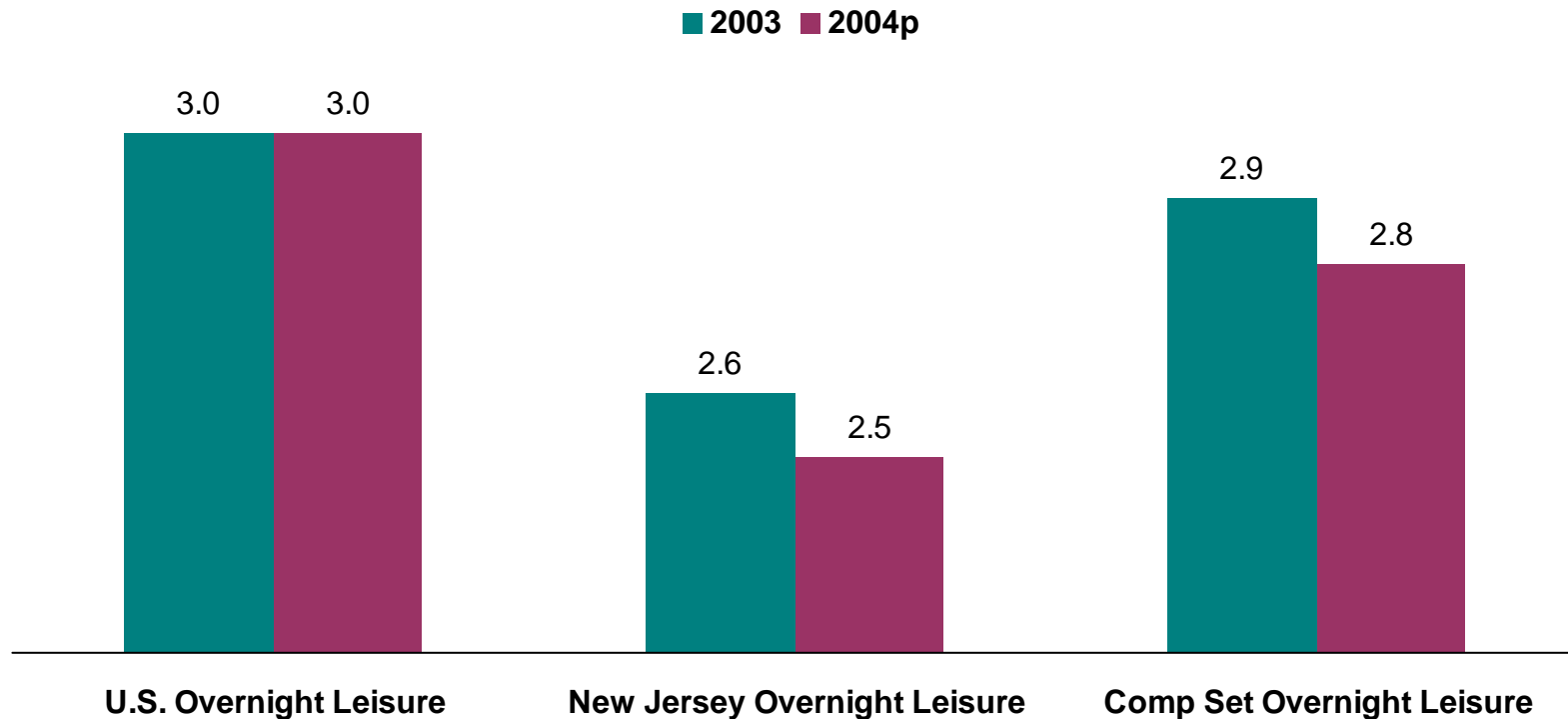




Average Stay Length: U.S., Competitive Set, and New Jersey (2003 vs. 2004p/Overnight Leisure/Person-trips)



The average stay length of overnight leisure visitors to New Jersey is slightly lower than the U.S. and the competitive set with 3.0 and 2.8 nights, respectively. However, both New Jersey and the competitive set experienced a decreased stay length in 2004p while the U.S. remained constant.

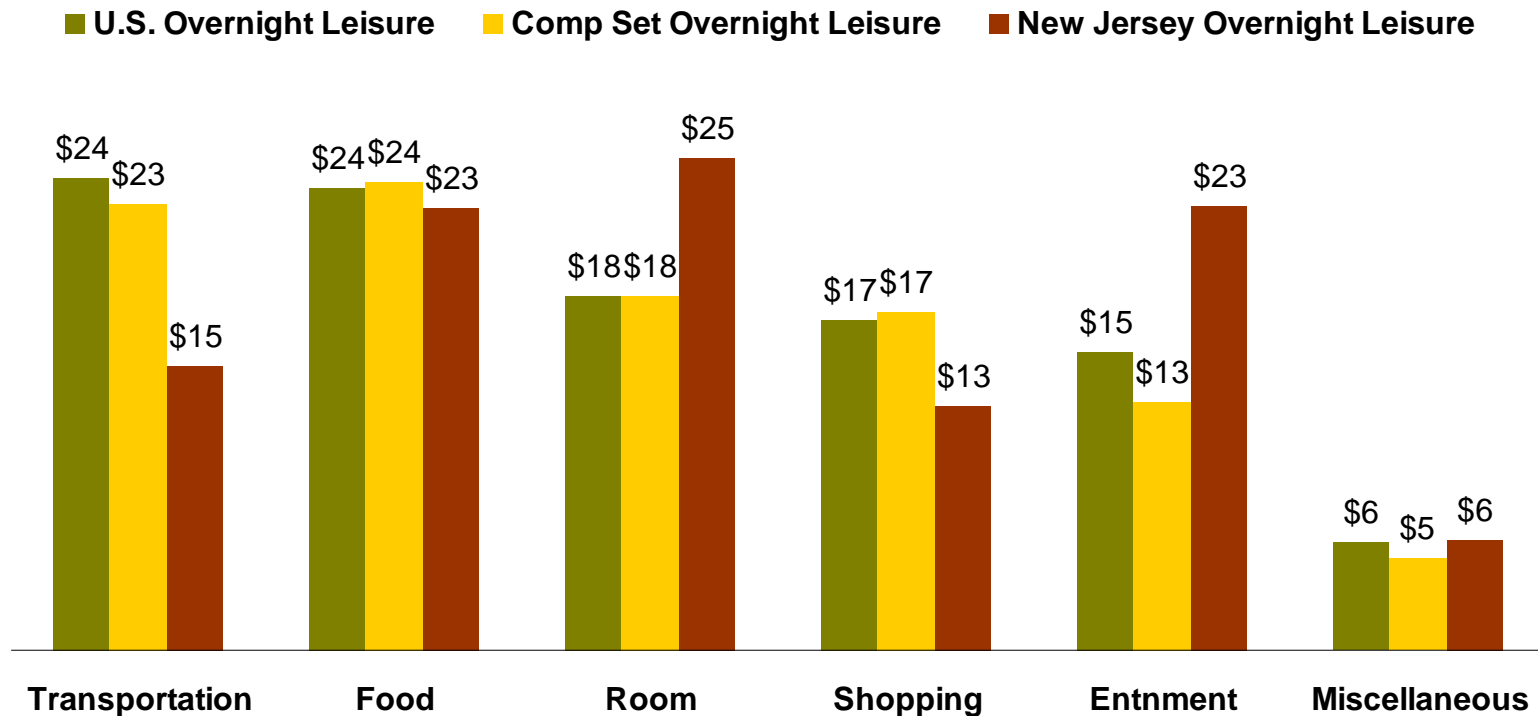


Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.

Average Daily Spending U.S., Competitive Set, and New Jersey (2004p/Overnight Leisure/Person-Days)



The chart below details the average daily spending per person for six spending categories. The greatest relative expense that overnight leisure travelers to New Jersey incur is room spending with an average daily cost of \$25 for all types of paid and non-paid accommodations. This is notably higher than the U.S. and competitive set average. Likewise, visitors to New Jersey are likely to spend much more on entertainment than the U.S. and competitive set, marking it as a destination with vast entertainment options.

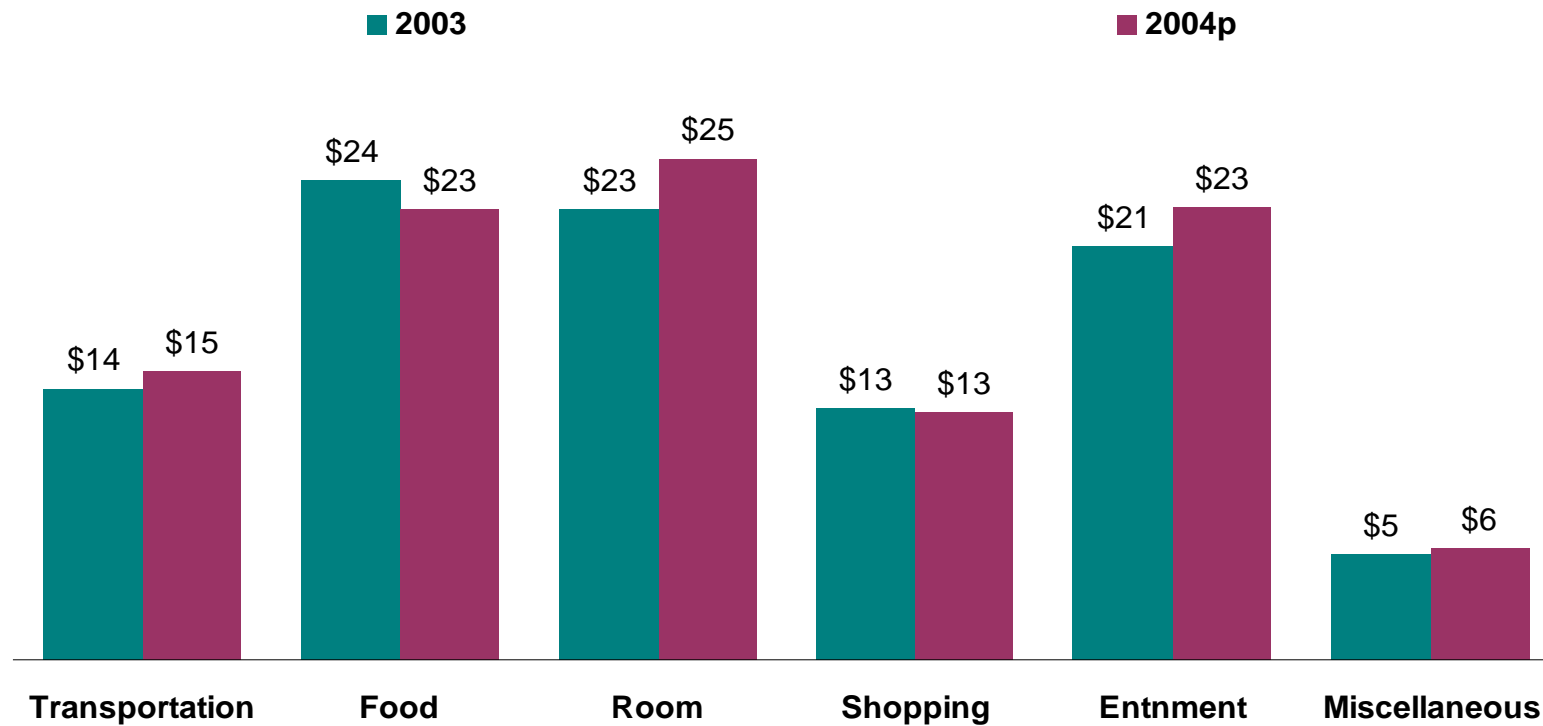




New Jersey Average Daily Spending (2003 vs. 2004p/Overnight Leisure/Person-Days)



Between 2003 and 2004p, there were slight shifts in spending in the room and entertainment categories, each increasing by \$2 per person per day.



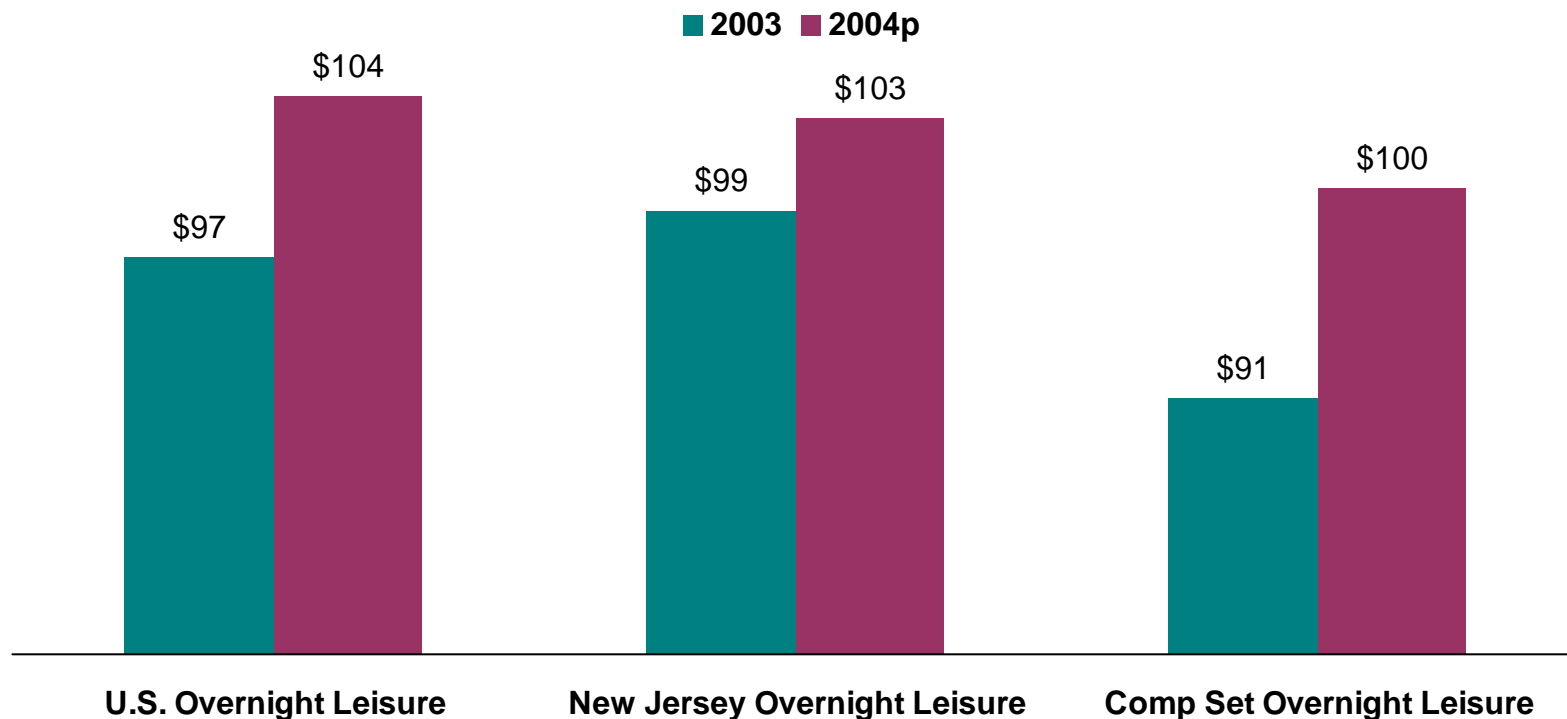
Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.



Total Average Daily Spending: U.S., Competitive Set, and New Jersey (2003 vs. 2004p/Overnight Leisure/Person-Days)



The total average daily spending per person is relatively similar between overnight leisure visitors to New Jersey, the U.S., and the competitive set. Each segment had an increase between 2003 and 2004p, with the competitive set enjoying the greatest increase.

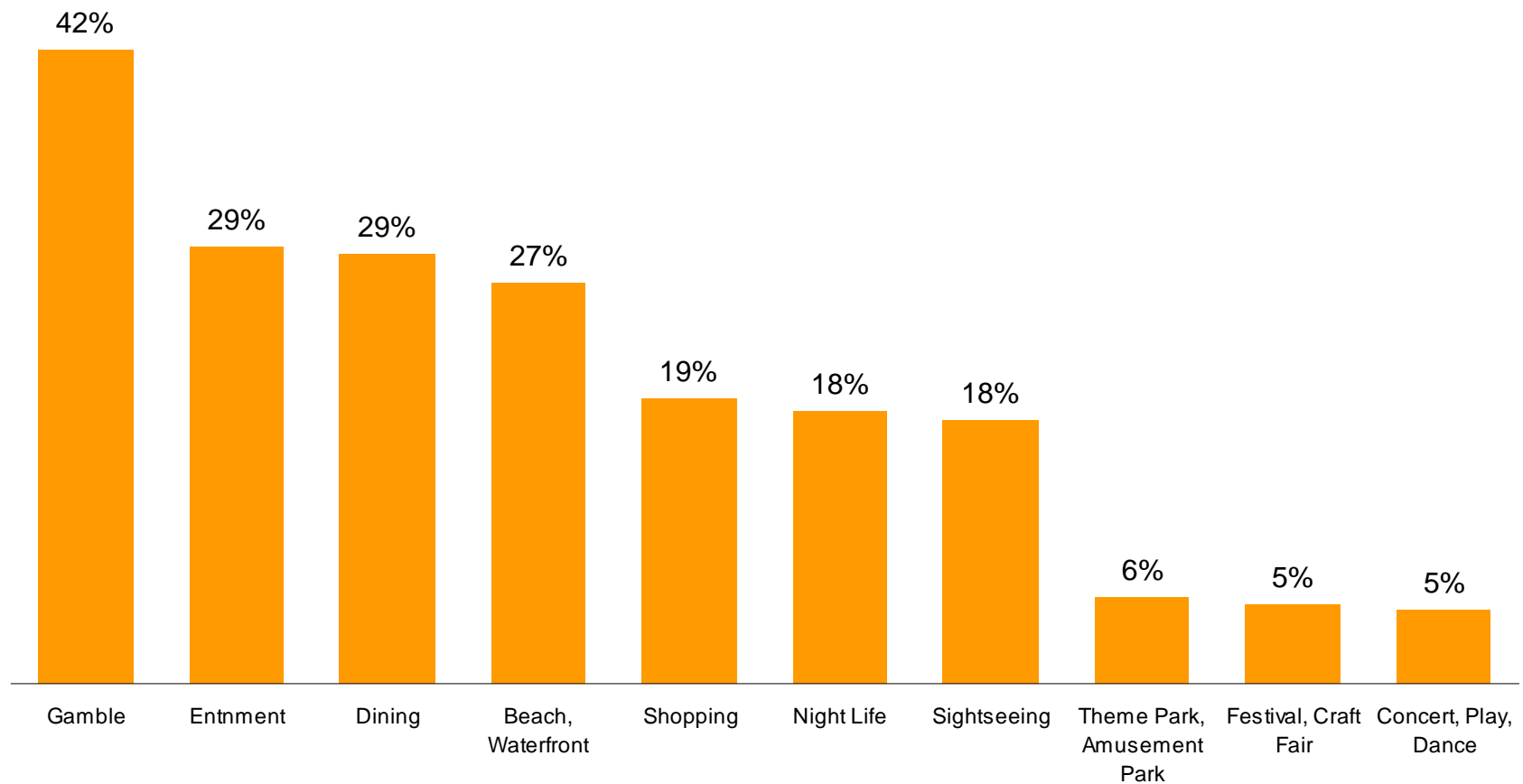


Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.

New Jersey Top Activity Participation (2004p/Overnight Leisure/Person-trips)



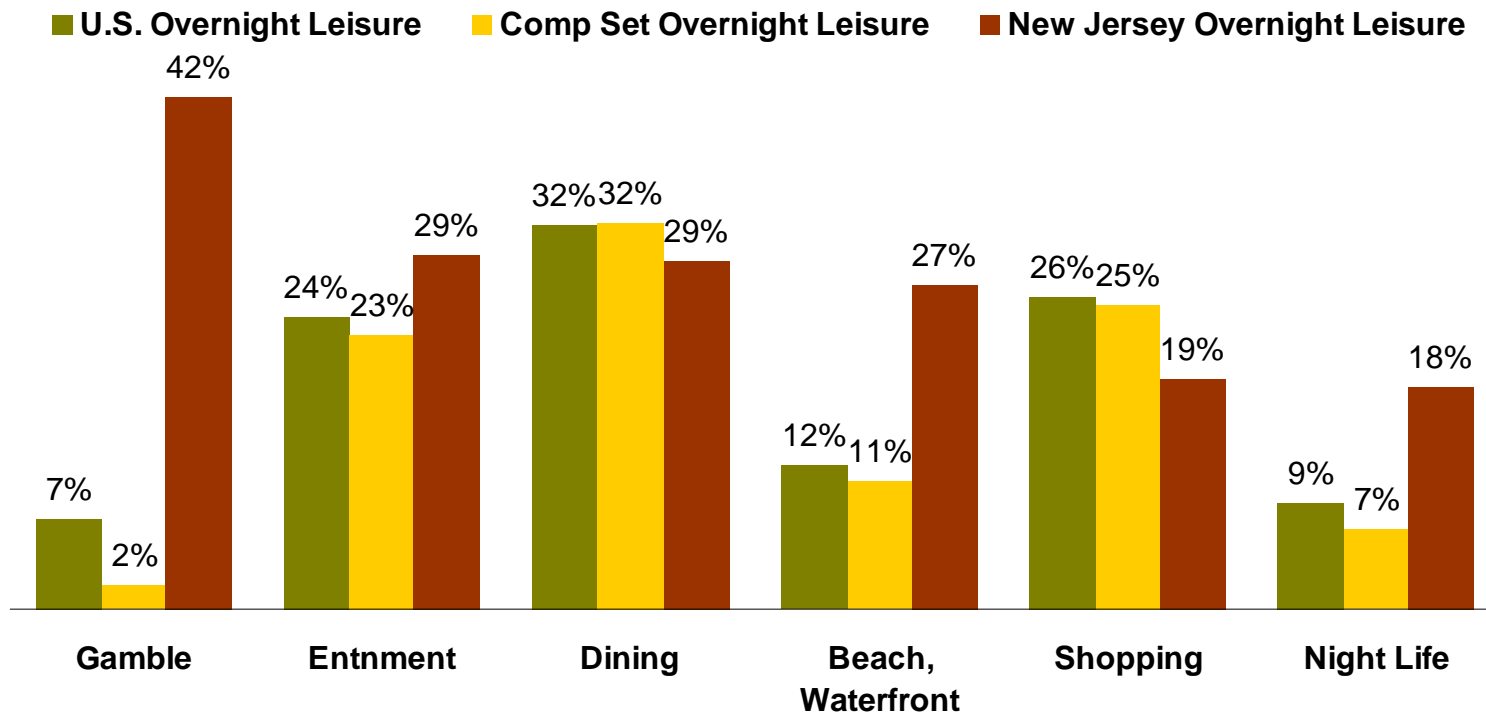
The following chart shows the top ten activities that overnight leisure visitors participated in while visiting New Jersey. Forty-two percent of visitors enjoyed gaming, followed by general entertainment, dining, and visiting beaches or waterfronts.



Top Activity Participation: U.S., Competitive Set, and New Jersey (2004p/Overnight Leisure/Person-trips)



When comparing tourism activities against the U.S. and competitive set, New Jersey visitors are more likely to participate in gaming, entertainment, beach/waterfront activities, and night life.



New Jersey Top Activity Participation (2003 vs. 2004p/Overnight Leisure/Person-trips)



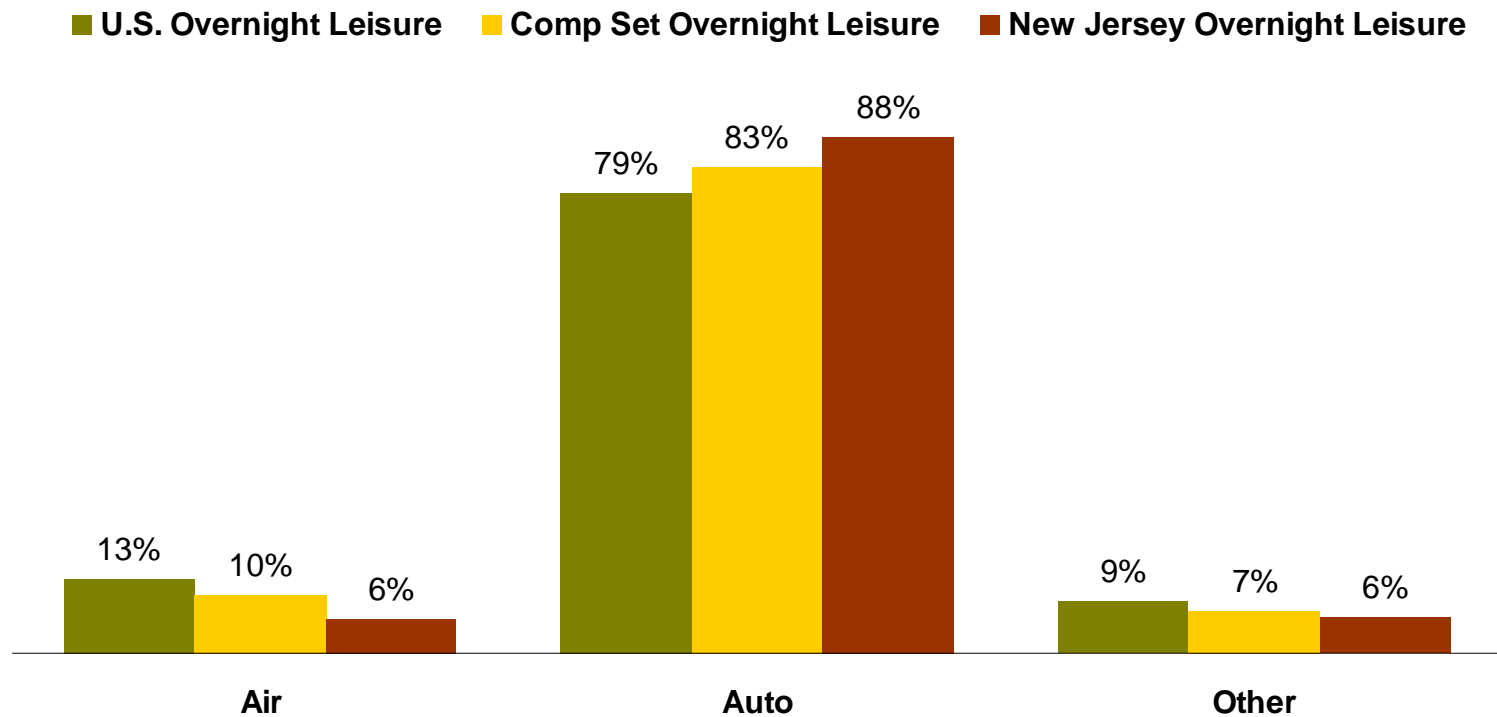
The top ten activities in New Jersey have remained fairly consistent over the last five years. Participation in gaming has increased from 33% of visitors in 2000 to 42% of visitors in 2004p.



Main Mode of Transportation: U.S., Competitive Set, and New Jersey (2004p/Overnight Leisure/Person-trips)



The majority of overnight leisure visitors to New Jersey arrive by auto, accounting for 88% of travelers.

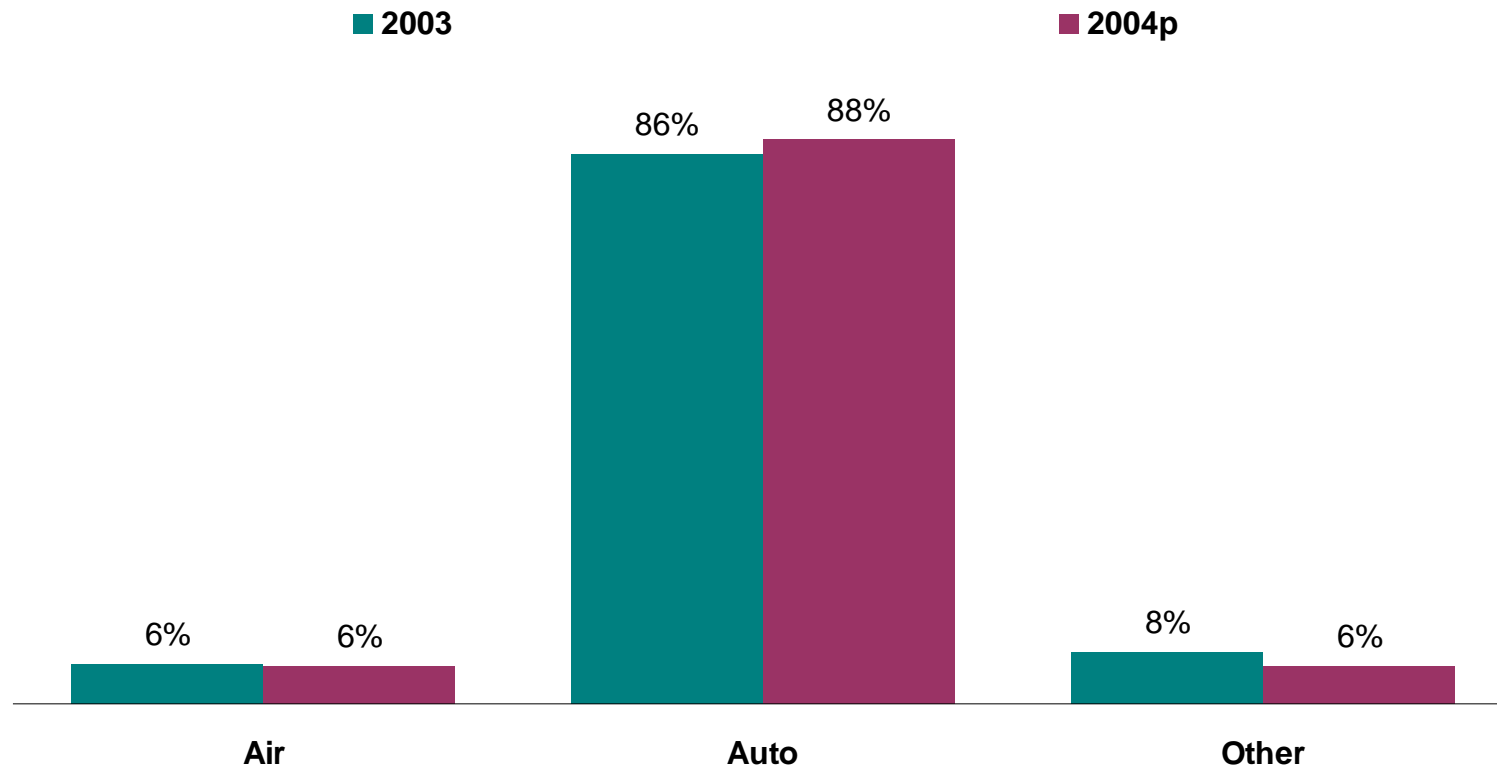


New Jersey Main Mode of Transportation (2003 vs. 2004p/Overnight Leisure/Person-trips)



The proportion of overnight leisure visitors visiting New Jersey by auto has remained relatively constant over the past five years. In 2004p that trend continued.

Other includes RV, train, bus, large truck, and other miscellaneous transportation modes.

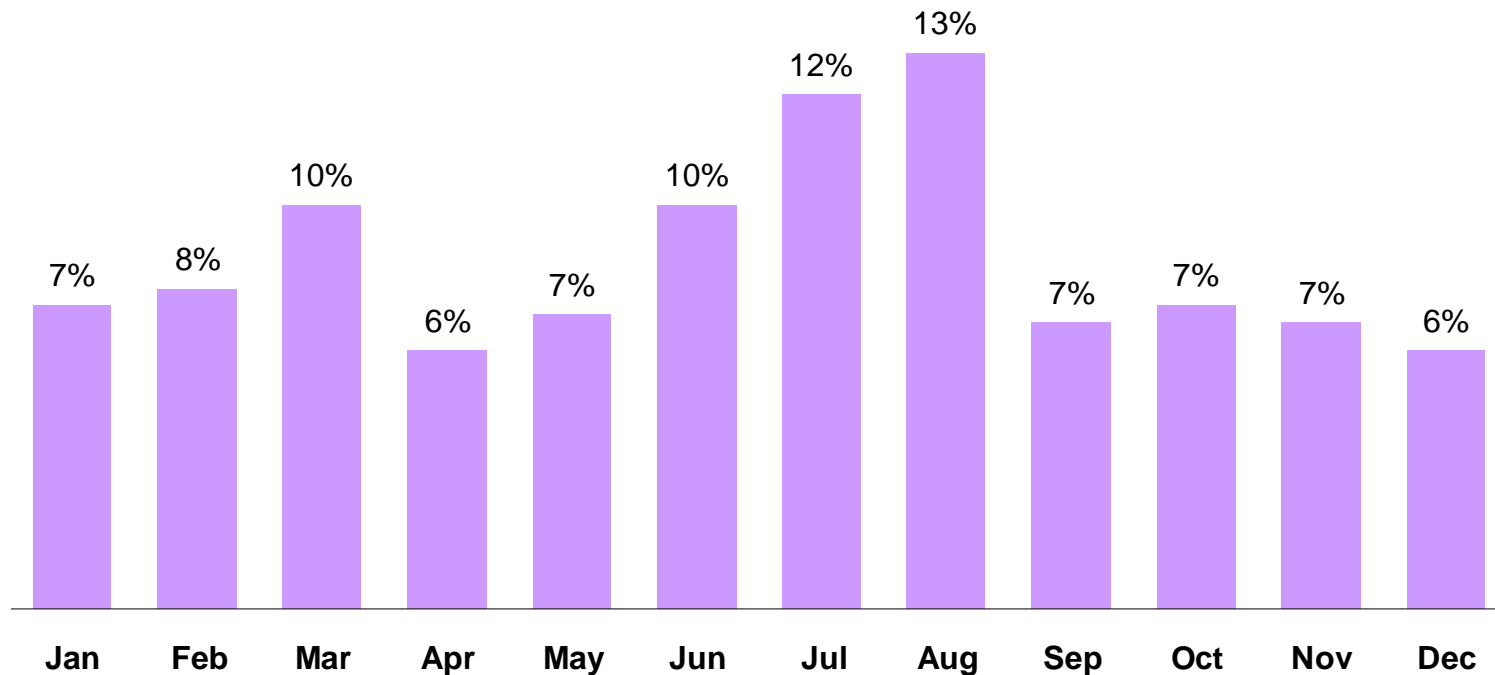




New Jersey Month Trip Started (2004p/Overnight Leisure/Person-trips)



New Jersey hosts the highest proportion of overnight leisure visitors in July and August, representing 12% and 13% of travelers across the calendar year, respectively.

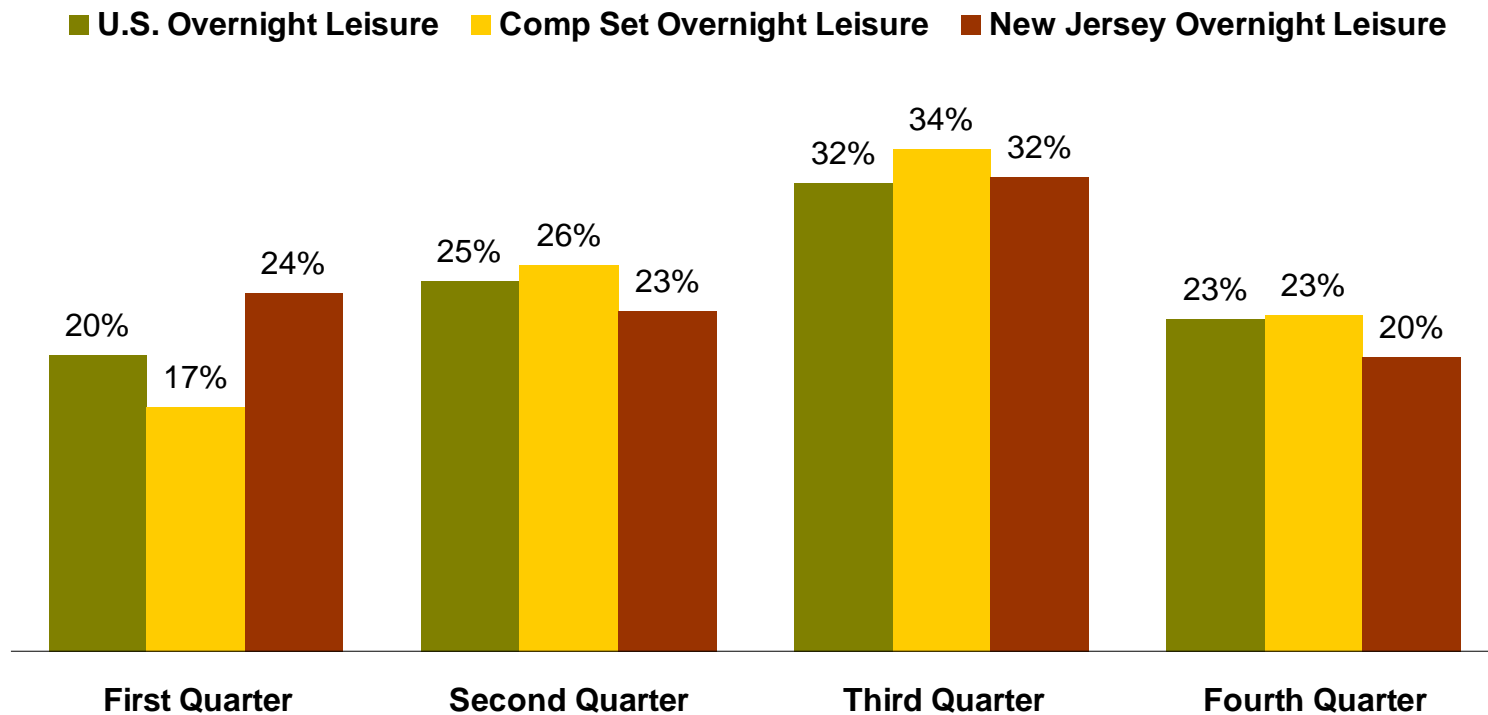




Trip Timing by Quarter: U.S., Competitive Set, and New Jersey (2004p/Overnight Leisure/Person-trips)



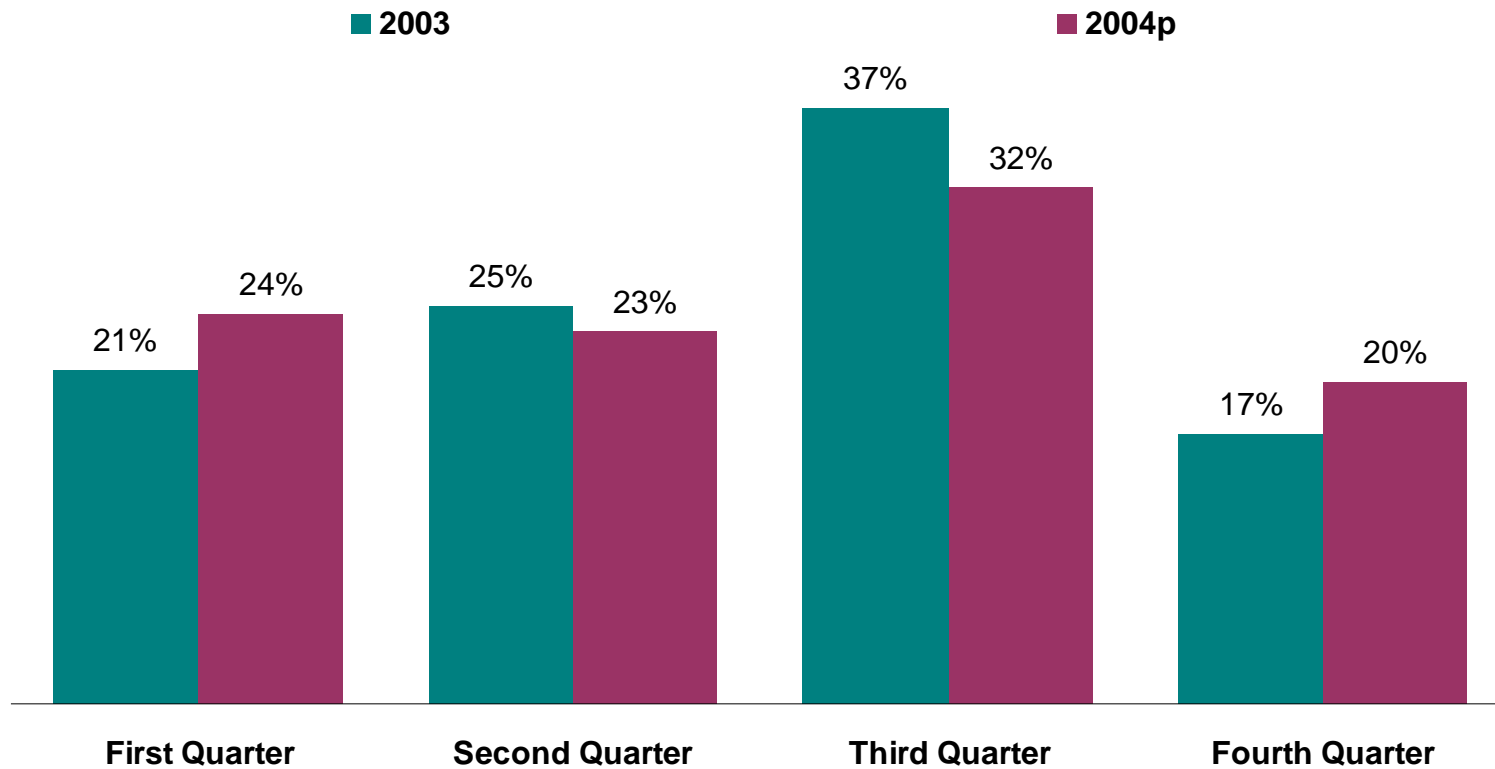
While the majority of overnight leisure visitors to New Jersey visit in the third quarter (July-September), representing 32% of travel, the State beats the competition in the first quarter (January-March). Among the competitive set, only 17% of visitors travel to the destination in the first quarter compared to 24% in New Jersey.



New Jersey Trip Timing by Quarter (2003 vs. 2004p/Overnight Leisure/Person-trips)



The share of overnight leisure travelers by quarter varies from year to year. The share of travelers in the third quarter has ranged from 32% to 37%, historically. Between 2003 and 2004p, overnight leisure travel shifted the most, down 5 percentage points, in the third quarter.

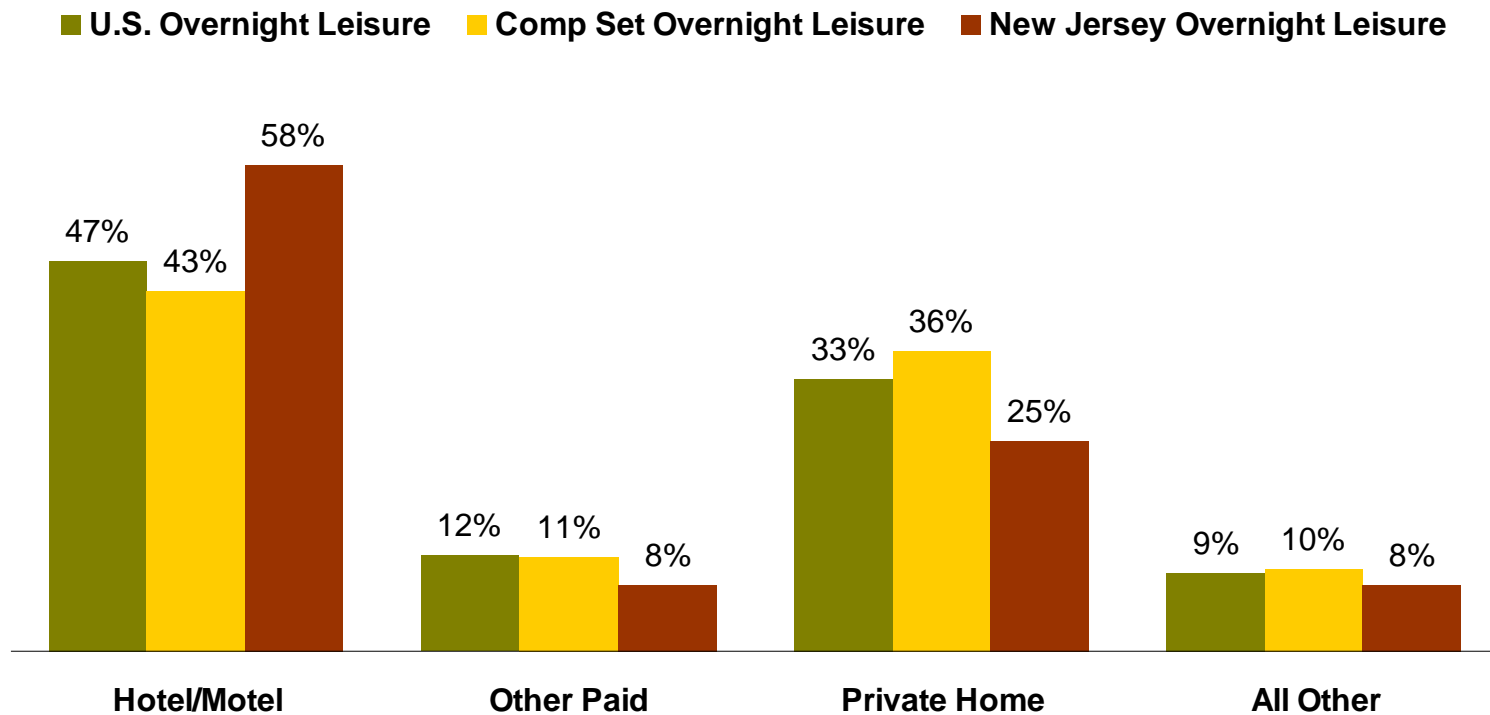


Accommodations Type: U.S., Competitive Set, and New Jersey (2004p/Overnight Leisure/Person-trips)



Among overnight leisure travelers in the U.S., almost half stay in hotels, 47%. New Jersey hosts a notably higher share of overnight leisure visitors in hotels, accounting for 58% of the market.

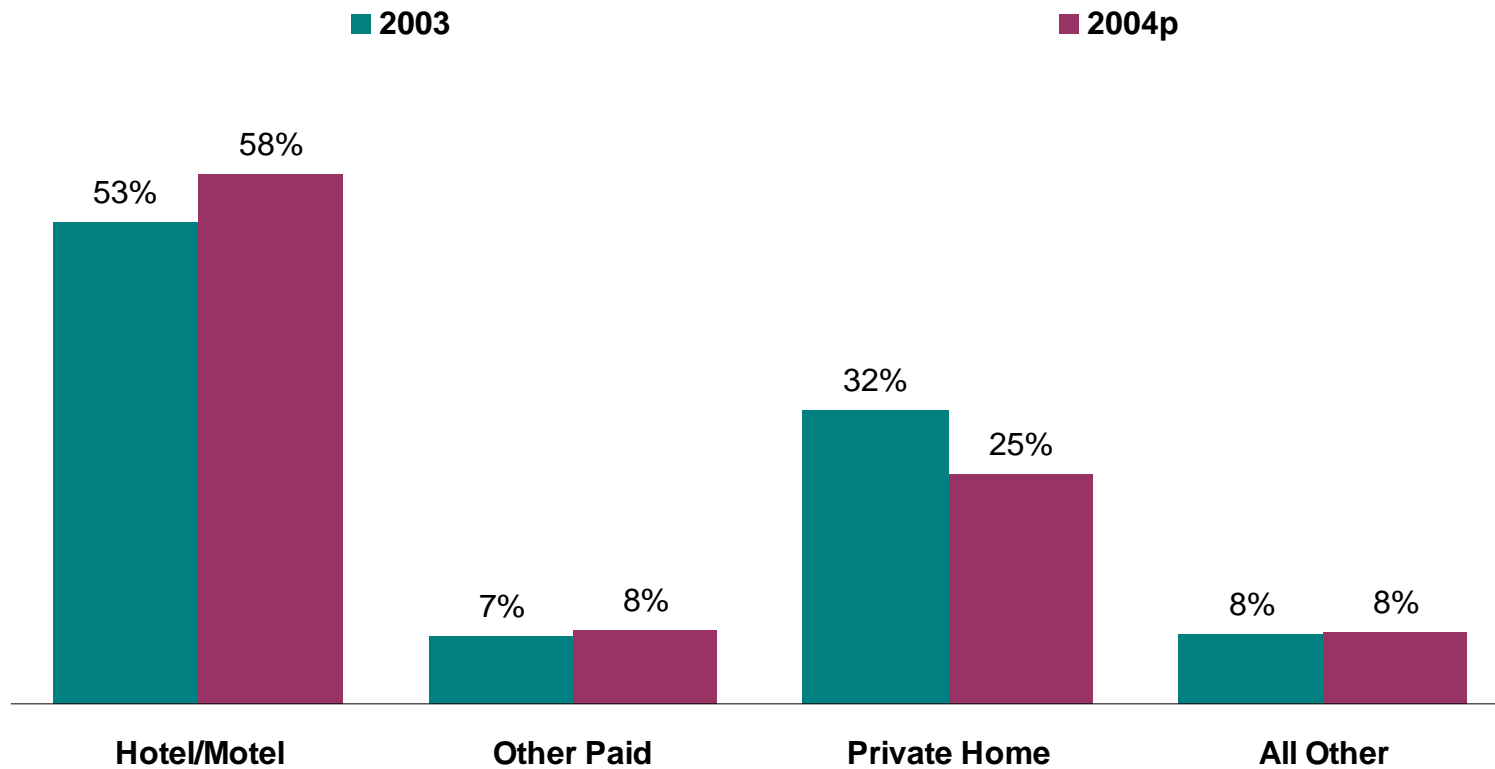
Other Paid accommodations include campgrounds, bed & breakfasts, and paid timeshare. *All Other* accommodations include second home ownership, time shares (own), and miscellaneous accommodations.



New Jersey Accommodations Type (2004p/Overnight Leisure/Person-trips)



New Jersey had the highest share of overnight leisure visitors that stayed in a hotel in the last five years, with another increase from 2003 to 2004p from 53% to 58%.





Positioning Intelligence Summary



- New Jersey travel can be characterized by such factors as why travelers visit, where they stay, and what they do. The following are primary characteristics of New Jersey overnight leisure visitors:
 - 34% of overnight leisure visitors travel to New Jersey for getaway weekends.
 - 47% of overnight leisure travelers visit as a couple.
 - The average party size of travelers in New Jersey increased by 4.5% to reach 2.3 persons per party.
 - The majority of overnight leisure visitors to New Jersey only stay one night, 44%. The average length of stay is 2.5 nights.
 - The average daily spending per person among overnight leisure travelers to New Jersey increased 4% from \$99 in 2003 to \$103 in 2004p.
 - Gaming is a top activity in New Jersey in which 42% of overnight leisure visitors participate, the highest among all activities tracked. Entertainment (29%), dining (29%), and visiting beaches/waterfronts (27%) follow with the highest proportion of participation among overnight leisure visitors.
 - New Jersey attracts the majority of travel from a drive market as 88% of overnight leisure visitors arrive by auto.
 - New Jersey attracts the largest share of overnight leisure visitors in the third quarter, 32%. This represents most of the summer season, July-September.
 - The vast majority of overnight leisure visitors to New Jersey stay in a hotel, representing 58% of the segment. Only 25% stay in a private home.



- Knowing what characterizes New Jersey travel, it is also important to know what sets the State apart from the competition. This not only helps marketers know what to highlight in their communications but also helps them to better understand the competitive arena:
 - New Jersey is the state for getaway weekends with 34% of overnight leisure visitors on such a visit. This is significantly higher than the competitive set which only attracts 18% of their visitors on getaway weekends. If travel planners wish to attract more visitors on general vacations, the competition is tight with Maryland, Virginia, and North Carolina attracting a higher proportion of that purpose of stay.
 - New Jersey also sets itself apart by travel party type. Among overnight leisure visitors 47% travel as a couple to New Jersey. The competitive set only attracts 33% of their visitors as couples. New Jersey's secondary party types, adults traveling alone and families, are more common in the competitive set. In fact, all competing (MD, NC, NY, PA, and VA) states attract a higher proportion of these markets than New Jersey.
 - Due to the high proportion of couples in New Jersey, the average size of an overnight leisure travel party is 2.3 persons compared to the U.S. average of 2.4 persons.
 - New Jersey has the shortest length of stay among all competing states with overnight leisure travelers staying 2.5 nights on average. The average length of stay among each competing state ranges from 2.6 to 2.9 nights.
 - Spending by overnight leisure travelers is the second highest in New Jersey with \$103 per person per day. Visitors spend the largest portion of their total spending on accommodations and entertainment, which is also higher than the competing states.
 - New Jersey exceeds the competition in its first and second highest activity of overnight leisure travelers, gaming and entertainment. New Jersey beaches and waterfront and nightlife are also activities that New Jersey visitors are more likely to participate in than visitors to the competing states.

Cont'd...



Positioning Intelligence Summary (continued)



- In terms of trip timing, the third quarter is a competitive season for overnight leisure travel. New Jersey attracts 32% of its visitor during this timeframe, however, all of the competing destinations attract a higher proportion of travel than New Jersey.
- New Jersey has a competitive advantage in the first quarter (January-March). The State attracts 24% of its overnight leisure visitors in the first quarter compared to the competitive set which only attracts 17% of their visitors in that timeframe
- New Jersey is, by far, a destination to enjoy hotels. Well over half of overnight leisure visitors to New Jersey stay at a hotel, 58%, compared to only 43% among the competitive set and 47% in the nation.

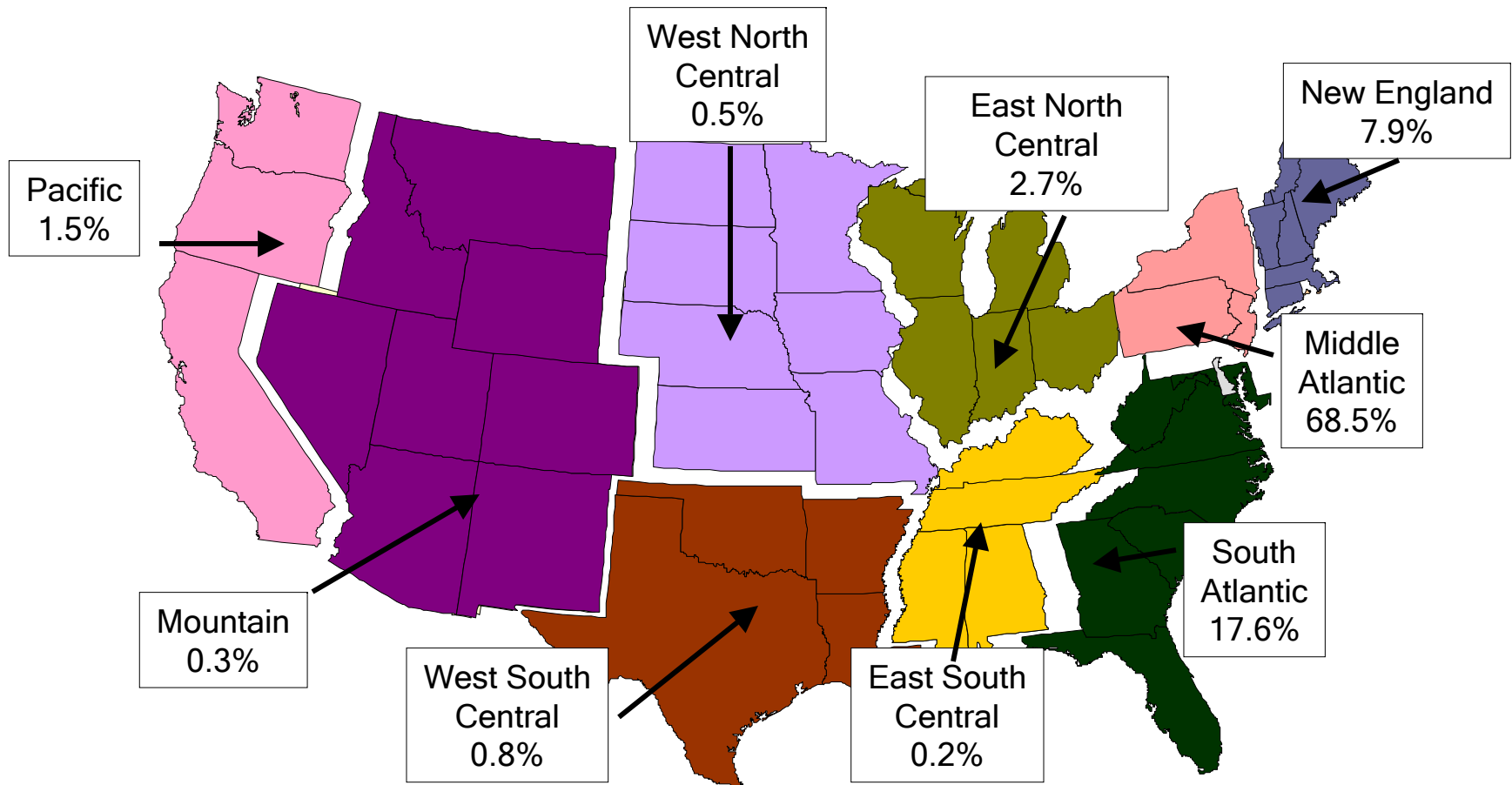




- The *Communicating* section will help travel marketers and planners know the key markets that generate the destination's largest share of visitors. This will help destination's launch marketing communications to markets that are likely to convert 'lookers to bookers'. Several origin market geographies are analyzed to give the destination a comprehensive view of where their visitors reside. The following describes these geographies:
 - The U.S. Census Bureau groups U.S. states into four and nine regions for statistical reporting purposes. These regions are based on purposes established in 1910 and are provided here for comparison to other Census data. This report evaluates the nine Census regions.
 - Defined by the A.C. Nielsen Company, DMAs or Designated Marketing Areas denote a geographical area consisting of a primary city and surrounding county or counties. The DMAs represent a unified geographic media market. There are 210 DMAs in the U.S. Every U.S. county is in one and only one DMA.



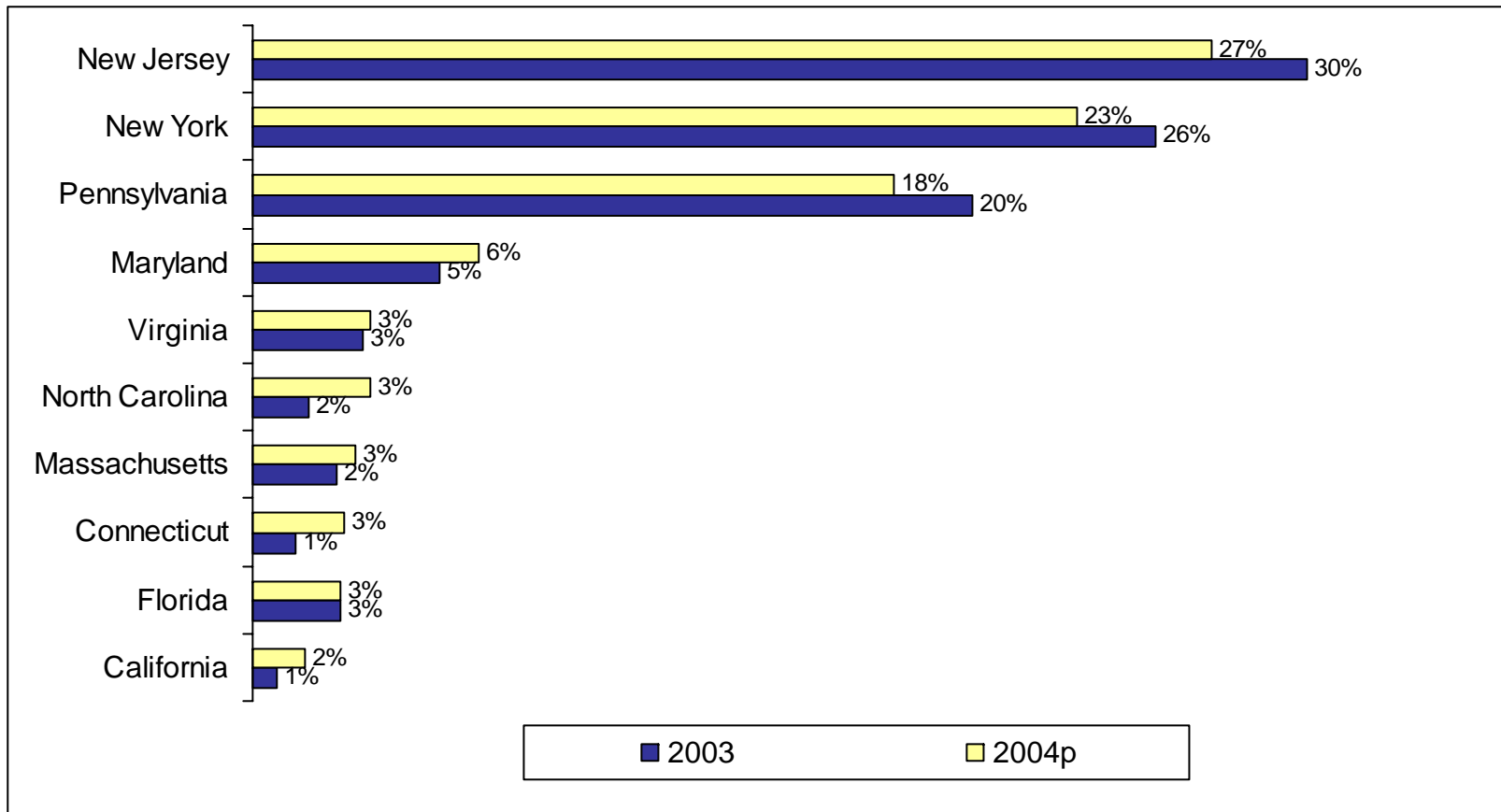
The vast majority of overnight leisure visitors to New Jersey are from the Middle Atlantic region, accounting for 68.5% of travel to the state. Travel from this region dropped slightly from 75.5% with increases from the South Atlantic and New England regions.



New Jersey Top 10 Origin States (2004p/% of Overnight Leisure/Person-trips)



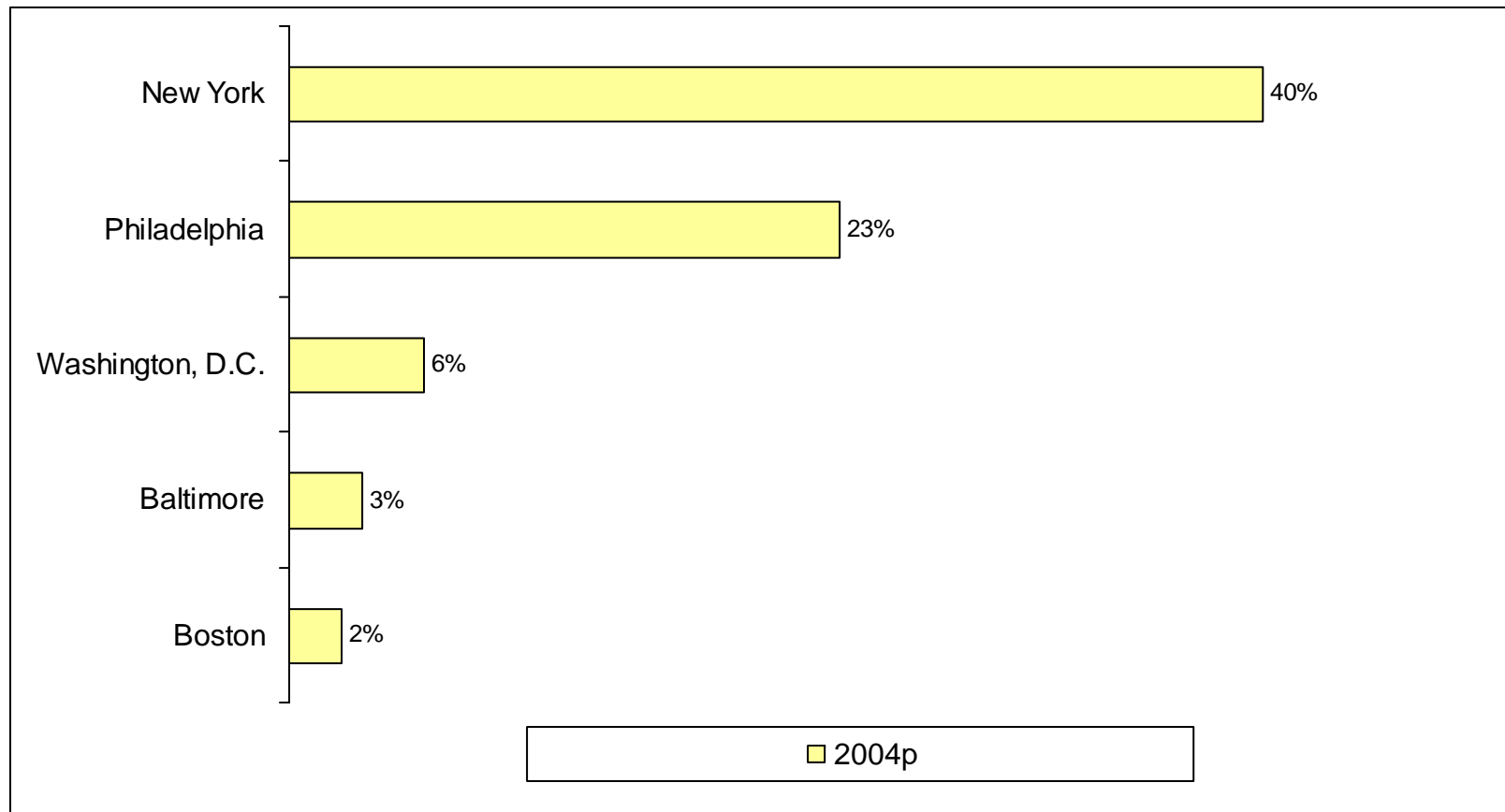
The largest share of overnight leisure visitors in New Jersey are residents themselves, accounting for 27% of the market. New York and Pennsylvania residents follow with 23% and 18% of overnight leisure market in New Jersey. However, New Jersey drew travelers from farther markets in 2004p as the share from these top states decreased slightly.



New Jersey Top 5 Origin DMAs (2001-2004p/% of Overnight Leisure/Person-trips)



The top five origin DMAs account for almost 75% of overnight leisure travel to New Jersey with New York City representing the majority of travelers to the State.

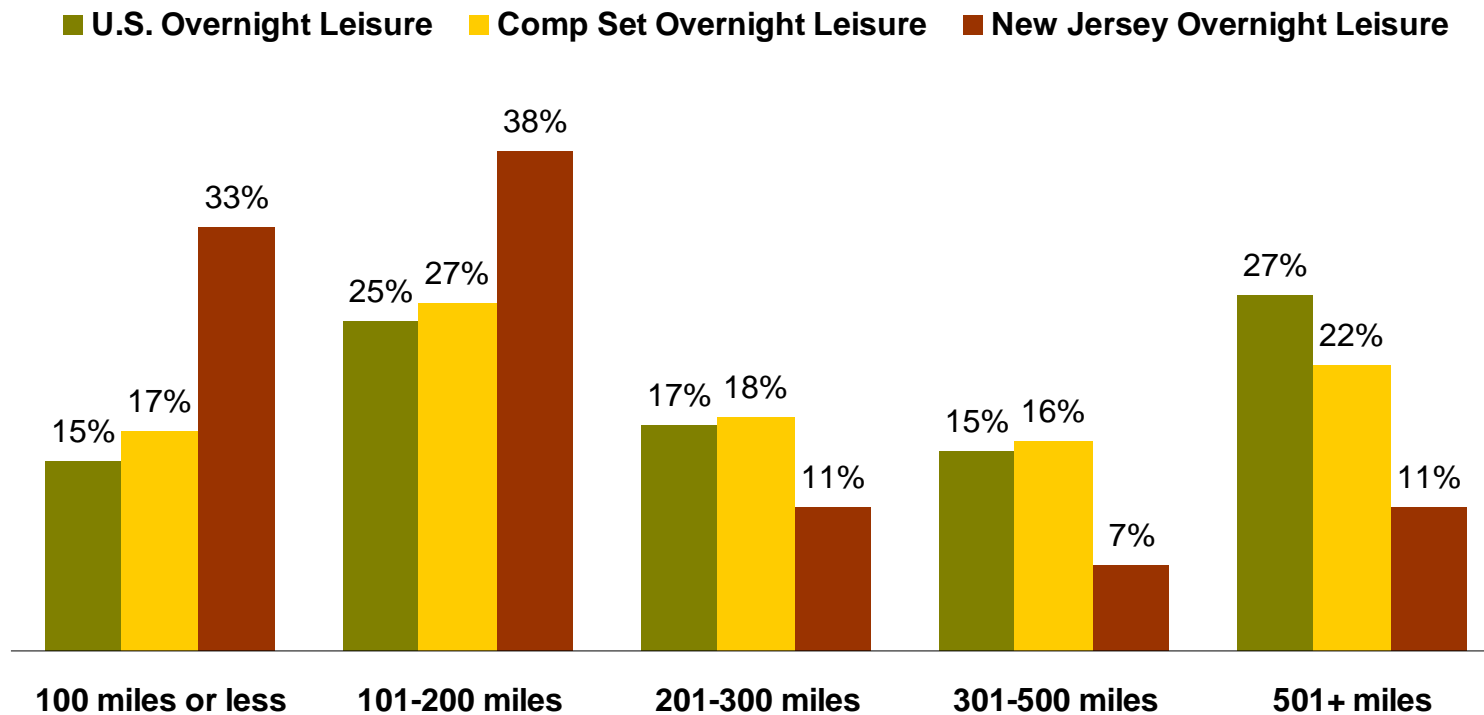




Travel Distance Distribution: U.S., Competitive Set, and New Jersey (2004p/Overnight Leisure/Person-trips)



The average one-way distance traveled by overnight leisure visitors to New Jersey was 257 miles from home. This distance is notably shorter than travelers to the competition which traveled 384 miles one-way on average.



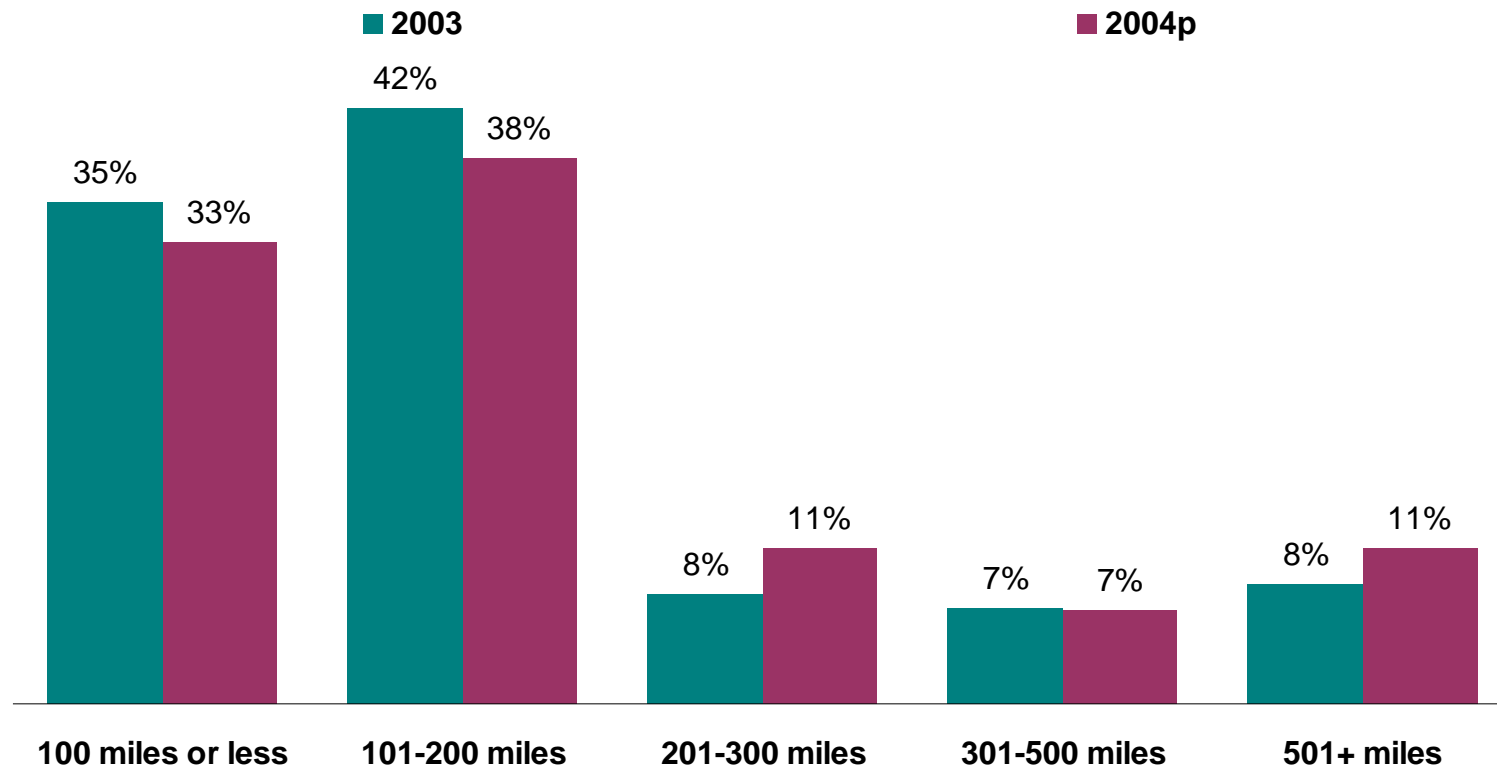
Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.



New Jersey Travel Distance Distribution (2003 vs. 2004p/Overnight Leisure/Person-trips)



The average one-way distance traveled to New Jersey has decreased from 351 miles in 2000 to 257 miles in 2004p. Between 2003 and 2004p, the share of visitors that traveled less than 200 miles decreased 77% to 71%.





Communicating Intelligence Summary



- New Jersey draws the vast majority of its overnight leisure visitors from the Middle Atlantic region, 68.5%, followed by the South Atlantic, 17.6%, and the New England region, 7.9%.
- Half of overnight leisure visitors to New Jersey are from the State itself or New York, accounting for 27% and 23% of the market. Pennsylvania follows as the top origin market with 18% of New Jersey's overnight leisure travel.
- While New Jersey tends to draw its overnight leisure visitors from a close market, in 2004p the State attracted more visitors from farther markets as the proportion of visitors from markets such as Maryland (6%), Virginia (3%), North Carolina (3%), Massachusetts (3%), and Connecticut (3%) increased.
- In terms of top origin DMAs, New York City accounts for 40% of New Jersey overnight leisure travel, followed by Philadelphia (23%), Washington, D.C. (6%), Baltimore (3%), and Boston (2%).



D.K. Shifflet & Associates, Ltd.
7115 Leesburg Pike, Suite 300
Falls Church, Virginia 22043

Phone: 703.536.0500
Web: www.dksa.com



Appendices



Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.



D.K. Shifflet & Associates Ltd.

Excellence in Travel Intelligence[®]

Founded in 1982, DKS&A 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



Industry Acceptance - Client List



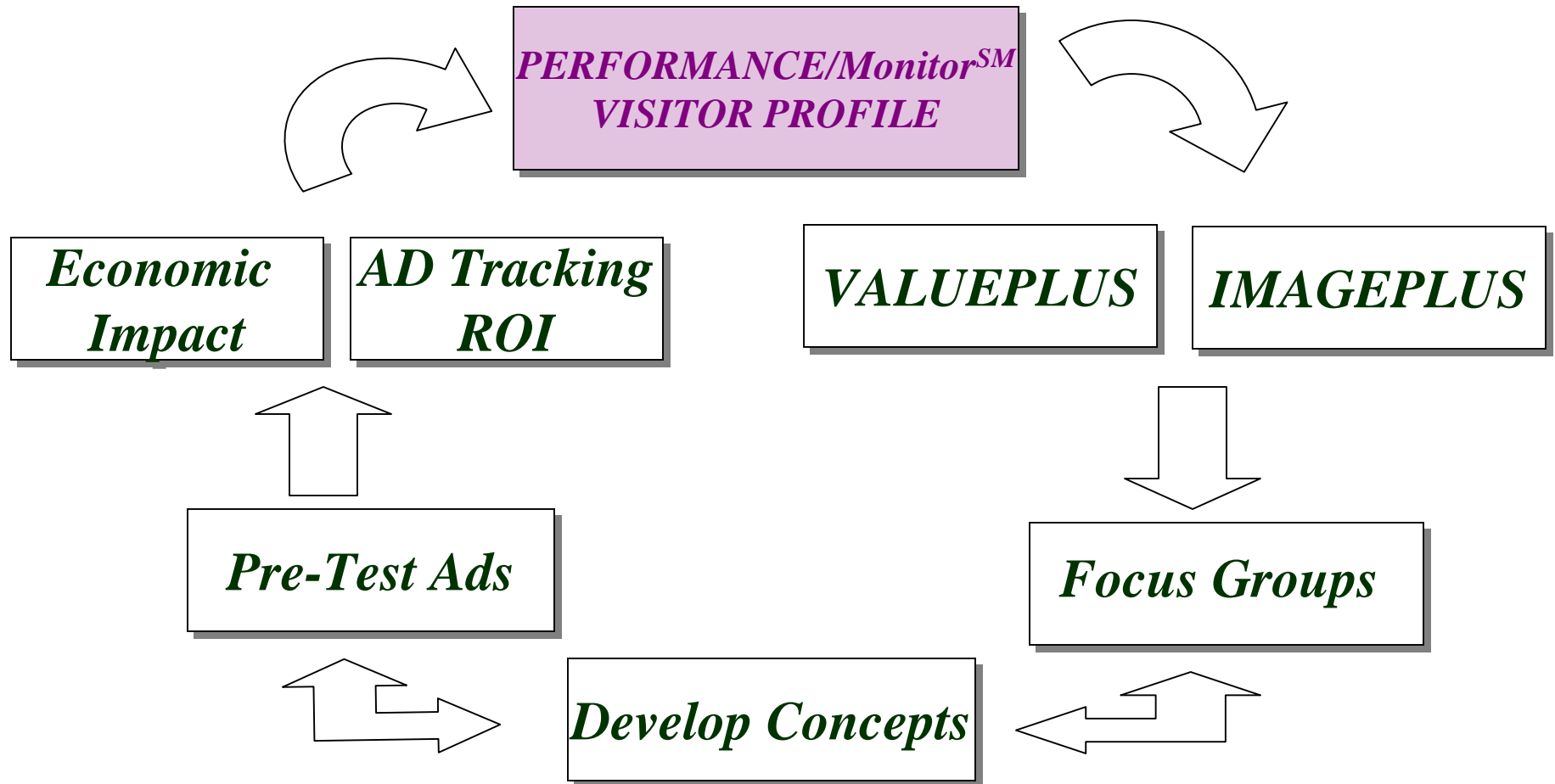
- **States:** Alabama, Arizona, Arkansas, California, Florida, Illinois, Indiana, Kansas, Kentucky, Louisiana, Maryland, Michigan, Minnesota, Mississippi, Missouri, New York, Pennsylvania, Texas, Utah, Vermont, West Virginia and Wisconsin
- **CVBs:** Asheville, Atlantic City, Baltimore, Boston, Branson, Buffalo, Chicago, Cleveland, Dallas, Detroit, Durham, Hilton Head, Los Angeles, Louisville, Kansas City, Kissimmee/St. Cloud, Long Island, Louisville, Miami, Myrtle Beach, Nashville, New York City, Niagara Falls, Orlando, Panama City Beach, Phoenix, Pigeon Forge, Providence, Salt Lake City, San Antonio, San Diego, San Francisco, Savannah, Traverse City and Tulsa
- **International:** British Columbia, Canadian Tourism Commission, Israel, and Ontario.
- **Attractions/Theme Parks:** Numerous attractions including most major theme park companies.
- **Hotel/Motels:** Cendant (7 Brands), Marriott (8 Brands), Accor (4 Brands) and InterContinental Hotel Group (3 Brands), Carlson Companies (Country Inns & Suites, Radisson). Other hotel clients include Best Western, Extended Stay America, Hilton, Hyatt (AmeriSuites), La Quinta (Baymont Inns) and Microtel Inns.
- **Other Clients:** AAA, Arthur Andersen, AVIS, Bear Stearns, Discovery Communications, Enterprise Rent-A-Car, Ernst & Young, Fairfield Communities, General Electric, IACVB, Marriott Vacation Club, Price Waterhouse Coopers, Port Authority of New York and New Jersey, and VISA USA.



DKS&A's Integrated Approach



- DKS&A's client value philosophy utilizes an integrated approach to implementing a client's marketing research efforts. We generally initiate research with a comprehensive visitor profile report and competitive analysis of the overnight leisure visitor.
- We have collected U.S. traveler data since 1992 (domestic and international), which is sold on a syndicated basis and reduces the cost of data collection for all subscribers. Yet each of our destination clients receives a custom report of their information and their competitors. We can further "MINE" our data to provide clients with "niche" segmentation reports and origin market outbound travel reports.
- We also conduct awareness and usage studies, visitor satisfaction and value studies and work with clients to develop branding and communication strategies.
- We work with our clients to develop and pre-test advertising.
- We also measure the results of advertising campaigns and marketing efforts in the field.
- We have exclusive associations with other leading companies in specific research and economic disciplines that provide our clients with world class expertise in key areas of marketing research and accountability.
- This integrated approach is designed to maximize our client's resources and produce actionable marketing intelligence, which we believe will produce better decision making and bottom line results.





Appendix B— *PERFORMANCE/Monitor*SM Methodology



- All of the information contained in this report is derived from D.K. Shifflet and Associates’ *DIRECTIONS*® tracking system.

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

- To meet the need for quality information, DKS&A 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.
 - DKS&A uses an overlapping monthly mail sequence which reduces sample bias for maximum accuracy.
 - Over 70,000 traveling households respond to the survey each year. This results in over 145,000 stays at destinations throughout the U.S.
 - By far, DKS&A has the largest U.S. destination and accommodations traveler database.
- Our 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 are balanced to the U.S. population across six demographic variables (age, gender, income, education, number of adults, and state of residence). Returned questionnaires are re-balanced to these same variables. This re-balancing ensures findings reflective of the U.S. population and enables findings to be projectable to the entire U.S. population.



Methodology (continued)



- 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.



Appendix C– Study Specifications and Definitions



- *Objective* - Describe the *domestic overnight leisure* travel market in New Jersey compared to the U.S. and competition.
- *Sampling Frame* - All U.S. domestic overnight leisure travelers on mail panel during the preliminary 2004 travel year in the following destinations:

State	Sample Size
- New Jersey	911
- Maryland	622
- New York	1,545
- North Carolina	1,170
- Pennsylvania	1,460
- Virginia	1,044

- *Timeframe* - The 2004 preliminary year provides an early estimate of travel for the 2004 calendar year. The client has defined the preliminary data to contain travel data from Quarter 4 2003 through Quarter 3 2004. The preliminary data is used in this report to facilitate the timing of the New Jersey Governor's conference.



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 accurate 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 10%-using the chart below-we can say that the actual proportion of the population is 10% plus or minus 0.3 percentage point. DKS&A uses a 90% confidence level 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 2004p	Percentage Finding in Report or Data Tables				
		At or near 2% or 98%	At or near 5% of 95%	At or near 10% or 90%	At or near 25% of 75%	At or near 50%
<i>Overnight Leisure</i>						
U.S.	29,158	0.1%	0.2%	0.3%	0.4%	0.5%
New Jersey	911	0.5%	1.0%	1.4%	2.1%	2.7%
Competitors (NET)	5,376	0.2%	0.4%	0.6%	0.8%	1.1%
Maryland	622	0.7%	1.2%	1.7%	2.5%	3.3%
New York	1,545	0.4%	0.8%	1.1%	1.6%	2.1%
North Carolina	1,170	0.5%	0.9%	1.3%	1.8%	2.4%
Pennsylvania	1,460	0.4%	0.8%	1.1%	1.6%	2.1%
Virginia	1,044	0.5%	0.9%	1.3%	1.9%	2.5%

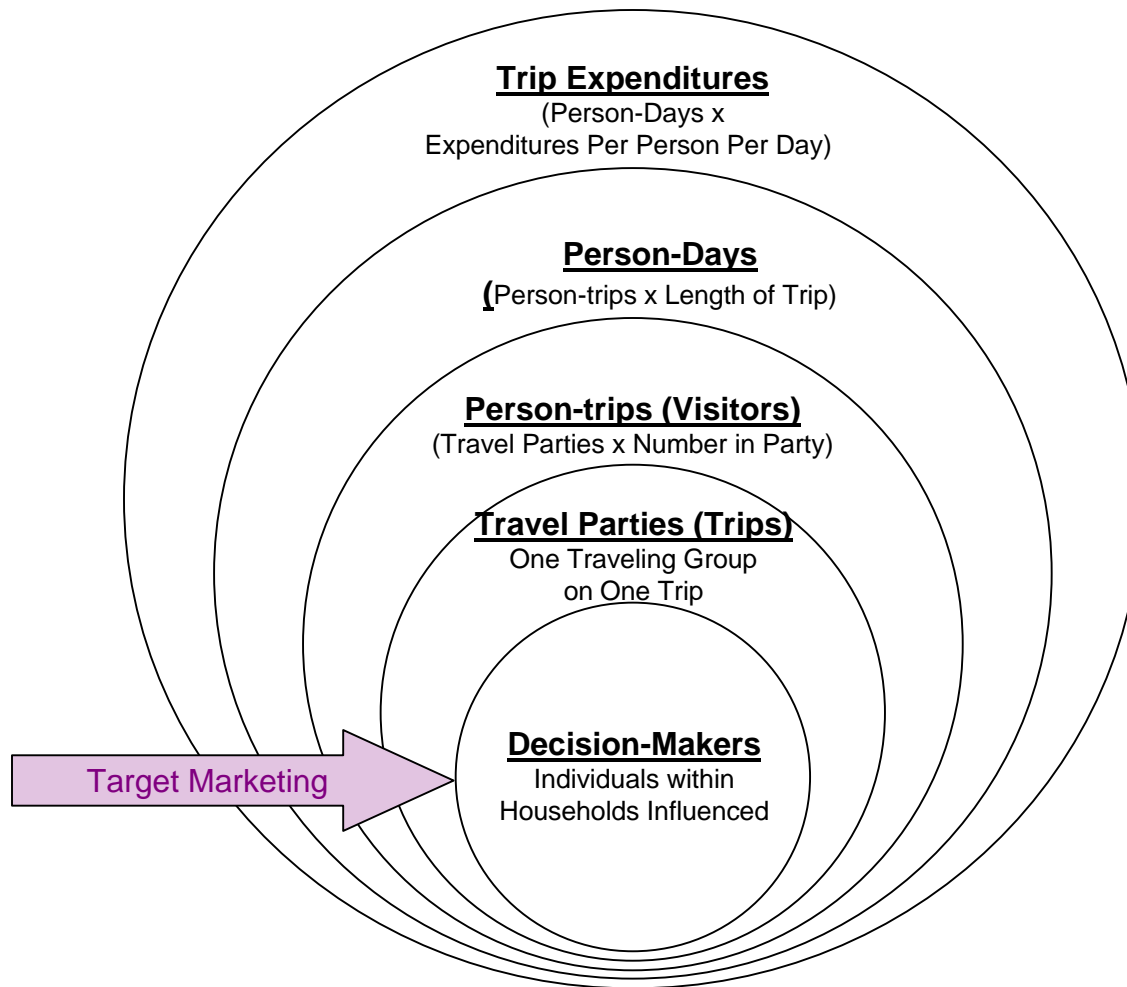
Note: Sample size differs slightly from table to table and reflects small differences in the proportion of respondents who answered the question



Reporting Levels



- DKS&A can present the results of our *DIRECTIONS*[®] *PERFORMANCE/Monitor*SM study of U.S. travelers at many levels. Each level of reporting is used for different purposes.
- The smallest unit is the Decision-Maker, commonly the target of your marketing efforts. The largest measure of visitor volume is *Trip Expenditures* and answers the question “How much did they spend”? It is common to discuss a specific destination’s share of total traveler expenditures.
- To answer the question of “How many people came and bought your product (destination)?”, we report the number of people who visited and how long they stayed, i.e., *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-trips* taken to a destination tells you the market size or just how many people came to your destination, but not how long they stayed. For example, this measure tells you how many people traveled for overnight leisure. It does not tell you how long they stayed, just that they were there for leisure.
- People often travel together with family, friends or with other groups. The number of *travel parties* tells you how many distinct groups of travelers came to your destination.





- In most cases, use of weights depends on what you are trying to learn through the data.
- 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.
- A weight makes a particular case, or response, more or less important.
 - Unweighted Data
 - Respondent Weight
 - Travel Weights
 - Stays Weight
 - Person-Trips Weight
 - Person-Days Weight
 - Room-Nights Weight
 - Trip-Dollars Weight



Unweighted Data



- Unweighted data is the raw data.
- Contains no links to the population or DKS&A data modeling.
- It is simply respondent data as returned to us on the surveys.
- Note that we mail surveys out to a representative sample of the U.S. population (through our mail panel, called Synovate).
- However, the returned surveys are not representative.
- The returned surveys are the raw, unweighted data.
- When we “re-balance” the data based on population, we arrive at the Respondent-Weighted data.
- Use Unweighted data, or No Weight, when running sample counts in *DIRECTABS*® (Distinct, Count).



Respondent Weight



- The Respondent Weight is the most basic form of weighted data to represent the U.S. population
 - Creates only links to the population and not to any modeling of the data.
- Weights the data by the demographic characteristics of age, gender, income, education, number of adults, and state of residence.
- Population distributions are obtained from the Current Population Survey's Annual Demographic Survey, which is conducted by the U.S. Census Bureau for the Bureau of Labor Statistics.
- Again, we use the respondent weight to run the most "untouched data". In other words, there are no other influences introduced from our data models.



- Stays Weight is the most basic travel weight. It is the broadest unit used for measuring a travel experience.
 - To arrive at the stays weight, the respondent weight is adjusted based on certain variables in order to ensure that there are a certain number of trips that fit a certain number of standards.
 - These adjustments are based on length of stay, length of trip, mode of transportation, purpose of trip, and special adjustments for particular mailing months and destinations.
 - Stays Weight reflects the “stay” in its rawest form: a little more subtle than the respondent weight.
- Mr. & Mrs. Smith’s 5-day vacation in Anytown, USA = 1 travel party, or 1 visit, or 1 STAY.*
- Keep in mind that a trip can have multiple stays.
 - For example, a person can travel from their house in Maryland, spend the day and night in Washington, D.C., then drive Philadelphia, PA for a day and night and then back home to Maryland. This is one trip, but two stays. DMOs profile the “stay” at the particular destination. States profile all stays that were part of the trip.
 - After running data using no weights (or unweighted), then using the respondent weight, the stays weight is then a good weight to use to help explain causes of change in volume segments, because it is the purest way of looking at characteristics of the stay without any other influences. This progression of running data as unweighted, followed by the respondent weight, and finally using the stays weight is the appropriate progression to sorting out a data problem.
 - The stays weight is the appropriate weight to use if you want to profile your travel parties.



Person-Trips Weight



- **Person-Trips Weight** = The total number of people on a stay, regardless of the length of their stay. This measure generally equates to the number of visitors.

*Stay Weight * Total Party Size*

- Person-Trips weight is like Person-Days excluding the length of stay
- If you are running a “profile” of your visitors, this is the most common and proper weight to use, with a few exceptions.
- Use of this weight takes into account the number of people on a trip. Travel parties that are larger in size have higher person-trip weights, while travel parties that are smaller in size have lower person-trip weights.

Mr. & Mrs. Smith's 5 day vacation in Anytown, USA = 2 person-trips or 2 visitors.



- **Person-Days Weight** = The total number of people on a stay multiplied by the number of days they are on the stay. I.E. You and a friend go to Cleveland for a week (7 days). This would be 2 people x 7 days each = 14 person-days.

Person-Trips * Number of Days in Stay

- Use of this weight takes into account the number of people on the trip as well as how long they stayed. Travel parties that are larger in size and stayed for longer periods of time have higher person-day weights.
- The Person-Days weight is the best “proxy” weight for Trip-Dollars, because the Trip-Dollars weight has issues and is subject to very large variation due to smaller sample size and the nature of reporting information about money spent.

Mr. & Mrs. Smith's 5 day vacation in Anytown, USA = 10 person-days (2 person-trips x 5 days)



- **Room-Nights Weight** = The number of nights spent in a room, regardless of the number of people staying in the room.

*Stays Weight * Number of Nights in Stay*

- Room-Nights Weight is like Person-Days minus the people
- Use of this weight takes into account only the number of nights spent in rooms.
- This weight is generally only used for data dealing with those travelers that stayed in paid accommodations, but it can be used to measure stays in other accommodations.

Mr. & Mrs. Smith's 5 day vacation in Anytown, USA = 5 room-nights (given they stayed in a paid accommodation (most applicable))



- **Trip-Dollars Weight** = Use of this weight takes into account the amount of money spent by travelers. In other words, it accounts for the dollars contributed to a destination's economy by travelers. Using the trip-dollars weight shows the monetary worth/contribution of travelers as opposed to the contribution of number of trips or number of days spent in the destination.

Stays Weight * Total Travel Party Spending

- It is very interesting to compare data run in person-trips to the same data run in trip-dollars. For example, Couples may account for 20% of a destination's person-trips, but may account for 40% of a destination's trip-dollars.

If Mr. & Mrs. Smith spent \$100 per person per day on their 5 day vacation in Anytown, USA, their trip expenditures would be \$1,000 (10 person-days x \$100 per person per day).



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 choosing a weight, do not choose a particular weight if the weight and the variable have a common concept. For example, the variable party composition includes the concept of party size. Thus, you would not want to use the person-trips weight, because that also includes the concept of party size.
- When you profile visitors to your destination, the Person-Trips weight is generally preferred for the overall profile because you are seeking to understand the travel behaviors and characteristics of the entire population of your visitors.
- When you are running data to help determine potential travelers (behaviors and characteristics) an appropriate weight to use would be the Stays Weight. This is because you profile or describe your individual visitors, but you market via various forms of media to households, not individuals. Households are generally the travel parties who make the “stay” in your destination.
- The variable of Party Size has an impact on just about every variable.
- Example: There is a strong correlation between party size and length of stay. You should be careful when you say 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 your visitors were not really staying for longer periods of time. It may be that there was actually an increase in party size. There may have been an increase in share of travel by Families (which have a larger party size) and Families tend to stay for longer periods of time. So, the driver for an increase in length of stay that you may be seeing may be due to the fact that you simply had an increase in share of larger travel parties like Families, who also tend to stay longer, but may not have actually increased their length of stay.



Weights - Cheat Sheet



Copyright D.K. Shifflet & Associates, Ltd. All use, transmittal, and reproduction of these materials subject to contract with D.K. Shifflet & Associates, Ltd.

	P-Trips Report	P-Days Report	R-Nights Report	Trip-Dollars Report
<i>Age</i>	Person-Trips	Person-Days	Room-Nights	Trip-Dollars
<i>Income</i>	Person-Trips	Person-Days	Room-Nights	Trip-Dollars
<i>Party Composition</i>	Stays	Trip-Days	Room-Nights	Trip-Dollars
<i>Occupation</i>	Person-Trips	Person-Days	Room-Nights	Trip-Dollars
<i>Education</i>	Person-Trips	Person-Days	Room-Nights	Trip-Dollars
<i>Length</i>	Person-Trips	Person-Trips	Stays	Trip-Dollars
<i>Transportation</i>	Person-Trips	Person-Days	Room-Nights	Trip-Dollars
<i>Accommodations</i>	Person-Trips	Person-Days	Room-Nights	Trip-Dollars
<i>Expenditures</i>	Person-Days	Person-Days	Person-Days	Person-Days
<i>Travel Agent Usage</i>	Person-Trips	Person-Days	Room-Nights	Trip-Dollars
<i>Leisure Purpose</i>	Person-Trips	Person-Days	Room-Nights	Trip-Dollars
<i>Business Purpose</i>	Person-Trips	Person-Days	Room-Nights	Trip-Dollars
<i>Activities</i>	P-Ts or Stays	P-Ts or Stays	Stays	Trip-Dollars
<i>Distance</i>	Person-Trips	Person-Days	Room-Nights	Trip-Dollars
<i>Seasons</i>	Person-Trips	Person-Days	Room-Nights	Trip-Dollars
<i>Ratings</i>	Person-Trips	Person-Days	Room-Nights	Trip-Dollars
<i>Origin Markets</i>	Person-Trips	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 run using Person-Trips 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-Trips, which also takes into account the number of people, or party size. If you ran party composition weighted by Person-Trips, then larger travel parties, such as Families, would get heavier weights and smaller travel parties 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 Person-Days Weight. The reason for 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. Thus, the Person-Day Weight must be used.
- Length of Stay - Length of stay should never be run using Person-Days, Person-Trips or Room-Nights weights, and should be run using Stays Weight. The reason for 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 already includes a length of stay concept. In addition, Length of Stay should not be run using the Person-Trips weight. The reason for this is that Length of Stay and Party Size have a strong correlation. The Person-Trips weight contains the element of Party Size. Using the Person-Trips weight for Length of Stay may result in a false understanding of change in Length of Stay.
- Activities - Activities should be run using the Stays Weight or Person-Trips Weight and not the 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-Trips 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.



D.K. SHIFFLET & ASSOCIATES, LTD
*DIRECTIONS® PERFORMANCE MONITOR*SM
SURVEY QUESTIONS (9-19-02)

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 1991 or earlier]

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]



Questionnaire (continued)



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] <i>Available since 06/96</i>

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.



Questionnaire (continued)



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]	<i>("0" if day trip)</i>
Was the trip a group tour?	[Y/N]	

5b. TRAVEL PARTY 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	



Questionnaire (continued)



- Transportation 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 Company Website |
| 2 | 800 Phone # | 6 | Other Website |
| 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)



Questionnaire (continued)



RENTAL CAR

Was a Car/Truck rented?

[Y/N]

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*)

Trip Package \$ (Fly/Hotel, Cruise, Group Tour, etc.)

[Open End/Actual]

NOT IN PACKAGE

- | | | |
|-----------------------------|-------------------|-----------------------------|
| Main Transportation \$ | [Open End/Actual] | <i>Available since 7/96</i> |
| Rental Car \$ | [Open End/Actual] | <i>Available since 7/96</i> |
| Food/Drink \$ | [Open End/Actual] | |
| Entertainment/Recreation \$ | [Open End/Actual] | |
| All Shopping \$ | [Open End/Actual] | |



Questionnaire (continued)



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] <i>Available since 5/96</i>

TRIP TIMING

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



Questionnaire (continued)



6b. PURPOSE OF STAY

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

Leisure/Personal

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

Both Leisure and Business? [Y/N]



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



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: [Open End/Actual]

Location of Accommodation:	1 Airport	5 Small Town
	2 Downtown	6 Government Park
	3 Suburban	7 Ship
	4 Highway	8 Other



Questionnaire (continued)



- 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 |
| 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 |
| 3 | Direct to location | 7 | Other Website |
| 4 | Corp. Travel Dept. | 8 | Other |
- 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 |



Questionnaire (continued)



ACCOMMODATION EXPENDITURE

Dollars Per Night (Room Only) [Open End/Actual]
 Total Hotel/ Lodging Bill [Open End/Actual]
 Was price paid a Special Deal? [Y/N]

DEMOGRAPHICS

Number of Persons in Household: [Actual]

Annual Household Income:

1	Less than \$7,500	11	\$30,000-\$32,499
2	\$7,500-\$9,999	12	\$32,500-\$34,999
3	\$10,000-\$12,499	13	\$35,000-\$39,999
4	\$12,500-\$14,999	14	\$40,000-\$44,999
5	\$15,000-\$17,499	15	\$45,000-\$49,999
6	\$17,500-\$19,999	16	\$50,000-\$59,999
7	\$20,000-\$22,499	17	\$60,000-\$74,999
8	\$22,500-\$24,999	18	\$75,000-\$99,999
9	\$25,000-\$27,499	19	\$100,000-\$124,999
10	\$27,500-\$29,999	20	\$125,000+



Occupation of Adult Heads of Household:

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

Education of Adult Heads of Household:

- | | |
|--------------------------|-------------------------|
| 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 |
|-----------|-----------------|--------------------------------|



Questionnaire (continued)



Gender of All Persons in Household: Male Female

Age of All Persons in Household [Actual]

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.