New Jersey Image Study

Prepared for:
Winning Strategies Advertising

On behalf of:
New Jersey Office of Travel and Tourism

Prepared by:

DKS&A
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DIRECTIONS®

In Partnership with:

GLOBAL INSIGHT

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INTRODUCTION

D.K. Shifflet & Associates Ltd (DKS&A), in partnership with Global Insight, is pleased to present the research results for the New Jersey Tourism Image Study. As part of the comprehensive *New Jersey Tourism 2005 Quantitative Market Research* project, Winning Strategies, on behalf of the New Jersey Office of Travel and Tourism (NJOTT), requested research that would study the image of New Jersey as a travel destination.

The objective of the research study is to provide measures of perceptions of New Jersey as a travel destination among visitors and non-visitors to the State. To that end, DKS&A designed the following research project to help the NJOTT identify positive and negative images of the State, which can be highlighted or resolved through marketing communications.

The study surveyed travelers from New Jersey's key origin markets, Connecticut, Maryland, New Jersey, New York, and Pennsylvania, which account for 88% of all New Jersey travel. To reveal New Jersey's key strengths and weaknesses against competition, qualified survey respondents were those that took a leisure trip to New Jersey, New York, or Pennsylvania in the last 12 months or planned to take a trip in the next 12 months. The following report will detail the survey findings and provide recommendations for action so that the NJOTT can begin to highlight the State's tourism strengths and address the weaknesses.

New Jersey faces misperceptions among travelers from its key origin markets. Compared to travelers that have not been to New Jersey in the last 12 months, or plan to visit in the next 12 months, New Jersey visitors rate the State higher than the competition for the following list of characteristics. These are qualities that need to be communicated to non-visitors to align the market's image of the State to what it can deliver.

- Great overall destination quality
- High quality restaurant experiences
- Quality gaming casinos/horse racing
- Easy to get from place to place
- First class hotels and resorts

- A relaxing place to visit
- Upscale atmosphere
- A fun place
- Popular, well-known place
- Good for boating, water sports
- Good place for fishing

Primary attractions in New Jersey, such as Atlantic City and Cape May, received the highest awareness levels, activity levels, and positive image ratings. Lesser-known attractions that were cultural, historic, or outdoor recreation related, received the lowest awareness levels, activity levels, and image ratings.

Travelers to New Jersey may believe they already know what there is to do in the State, but with increased promotion and utility of travel planning resources, travelers can be exposed to the many attractions previous visitors to New Jersey value.
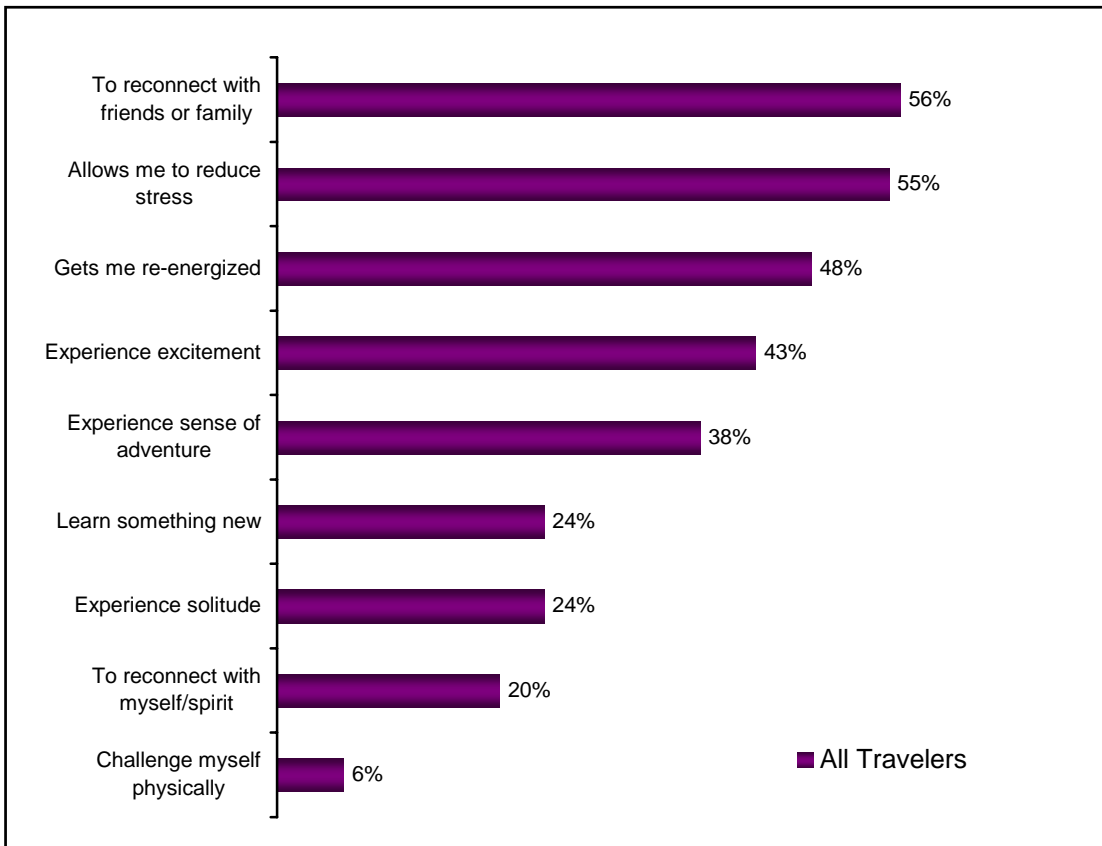
Travel Purpose and Consideration

It is important to understand why travelers take leisure trips and what their considerations are when selecting a destination.

Of all the travelers surveyed in the study, the majority seeks to reconnect with family and friends or reduce stress. Others wish to be re-energized, experience excitement or a sense of adventure. A smaller share of travelers want to learn something new, experience solitude, or reconnect with themselves. A minority of travelers seek to challenge themselves physically when taking a leisure trip.

Destinations can attract the attention of the majority of travelers by portraying images of relaxation or gatherings. Marketing tourism activities that allow visitors to learn a new skill and be alone or retrospective can also attract niche markets.

Chart 1: Reasons for taking a leisure trip
% of travelers that rated attribute high in importance for selecting a destination for a leisure trip (6 & 7 points on a 7-point scale)

Reason	All Travelers
To reconnect with friends or family	56%
Allows me to reduce stress	55%
Gets me re-energized	48%
Experience excitement	43%
Experience sense of adventure	38%
Learn something new	24%
Experience solitude	24%
To reconnect with myself/spirit	20%
Challenge myself physically	6%

After understanding what motivates travelers to take a leisure trip, the study investigates characteristics travelers seek when selecting a destination. Travelers were asked to rate over 40 attributes on a scale of improtance whether they were *not at all important* or *extremely important* in selecting a destination for a leisure trip.

The majority of travelers rated the *value for the money* as a key characteristic they seek when selecting a destination. Apart from the monetary characteristics, the majority of travelers also rated climate and weather as extremely important in their selection process. The table below details all attributes rated and the share of travelers that rated them as extremely important.

Table 1: Characteristics travelers seek when selecting a destination
% of travelers that rated attribute high in importance for selecting a destination for a leisure trip (6 & 7 points on a 7-point scale)

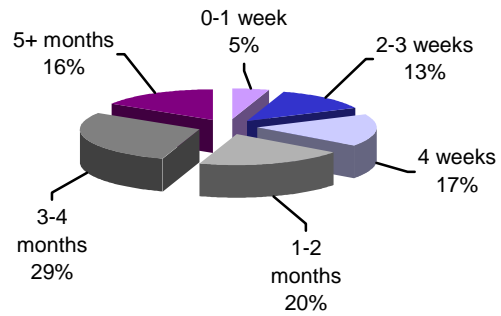| #	Attribute	%	#	Attribute	%
1	Nice climate/weather	69%	23	Upscale atmosphere	35%
2	Provides good value for the money	69%	24	High quality restaurant experience	34%
3	Provides a feeling of safety	65%	25	Famous historical sites	32%
4	A relaxing place to visit	62%	26	First class hotels & resorts	30%
5	A fun place	62%	27	Great fairs, festivals & cultural events	28%
6	A place with a lot of things to do	60%	28	A place children will love	28%
7	Good for adult vacation	60%	29	Great nightlife (entertainment)	28%
8	Great overall destination quality	59%	30	Quiet	26%
9	Great overall scenic beauty/visual appeal	56%	31	Theme parks/attractions	23%
10	Excellent service at hotels, restaurants, etc.	56%	32	Popular, well known place	23%
11	Exciting place to visit	56%	33	Good public transportation	21%
12	Unique and interesting place	54%	34	Luxurious	21%
13	Convenient	54%	35	Outdoor sports and recreation	21%
14	Sightseeing	53%	36	Quality gaming casinos/horse racing	19%
15	Inexpensive and available parking	52%	37	Excellent live theater/music concerts	19%
16	Friendliness of local residents	52%	38	High quality of shopping	18%
17	Easy to get from place to place	51%	39	Great art galleries, antique/craft shops	17%
18	Available info for local sites/events	49%	40	Good place for singles	14%
19	Good for family vacations	47%	41	Good for boating, water sports	14%
20	Great beaches/waterfront	46%	42	Good place for camping	12%
21	Good place for couples	45%	43	Good place for fishing	12%
22	A romantic place to visit	37%	44	Great golf facilities	5%

Trip Planning

Understanding a traveler's trip planning behavior helps a destination not only provide the resources helpful in educating consumers on the tourism product but also defines the window of opportunity to convert 'lookers to bookers.' This section of the report will define the timing horizon of traveler's trip planning process, what resources are used, and the satisfaction rating of the resources used.

Chart 2: How far in advance travelers plan a *vacation* (among all travelers)

0-1 week 5%
2-3 weeks 13%
4 weeks 17%
1-2 months 20%
3-4 months 29%
5+ months 16%

Most travelers, 55%, plan their *vacations* in less than two months. With such a short planning process, destinations that can make their travel information easily accessible with abundant seasonal or time-specific ideas for things to do are better positioned to secure the traveler's selection. However, as Chart 2 indicates, a large proportion of traveler's still plan their vacation well in advance. These travelers need to be treated in a different manner by providing information on seasonal events and activities well in advance – 3 or more months.

Planning a *weekend getaway* is completed in a much shorter timeframe than a general vacation. Well over one-half of travelers plan their weekend getaways in less than three weeks, accounting for 58% of travelers surveyed. In this instance, it is important for destinations to attract the last minute trips by making the research fast and booking easy in order to meet the travelers short time frame. Assembling weekend packages with activities and lodging in one purchase can ease the stress of booking a trip last minute. Additionally, when communicating these offerings, the timing should fit the 0-3 week timeframe when travelers plan to visit.

Chart 3: How far in advance travelers plan a *weekend getaway* (among all travelers)

3-4 months 6%
5+ months 2%
0-1 week 21%
1-2 months 16%
4 weeks 18%
2-3 weeks 37%
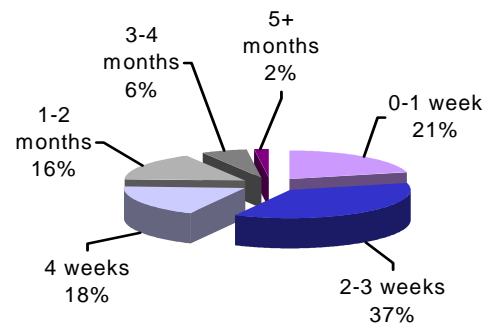
There are significant differences between New Jersey visitors and non-visitors when comparing trip-planning behavior. Leisure trips to New Jersey can be positioned as a last-minute getaway as significantly more New Jersey visitors plan their trip in less than a week than non-visitors, specifically those that go to New York.

- 25% of New Jersey travelers plan trips in less than a week
- 60% of New Jersey travelers plan trips in less than a month

The chart below details the trip planning timeframes by New Jersey visitors and non-visitors that traveled to New York or Pennsylvania.

Chart 4: Trip planning timeframe by New Jersey visitors and non-visitors
% of travelers that took a trip in the last 12 months
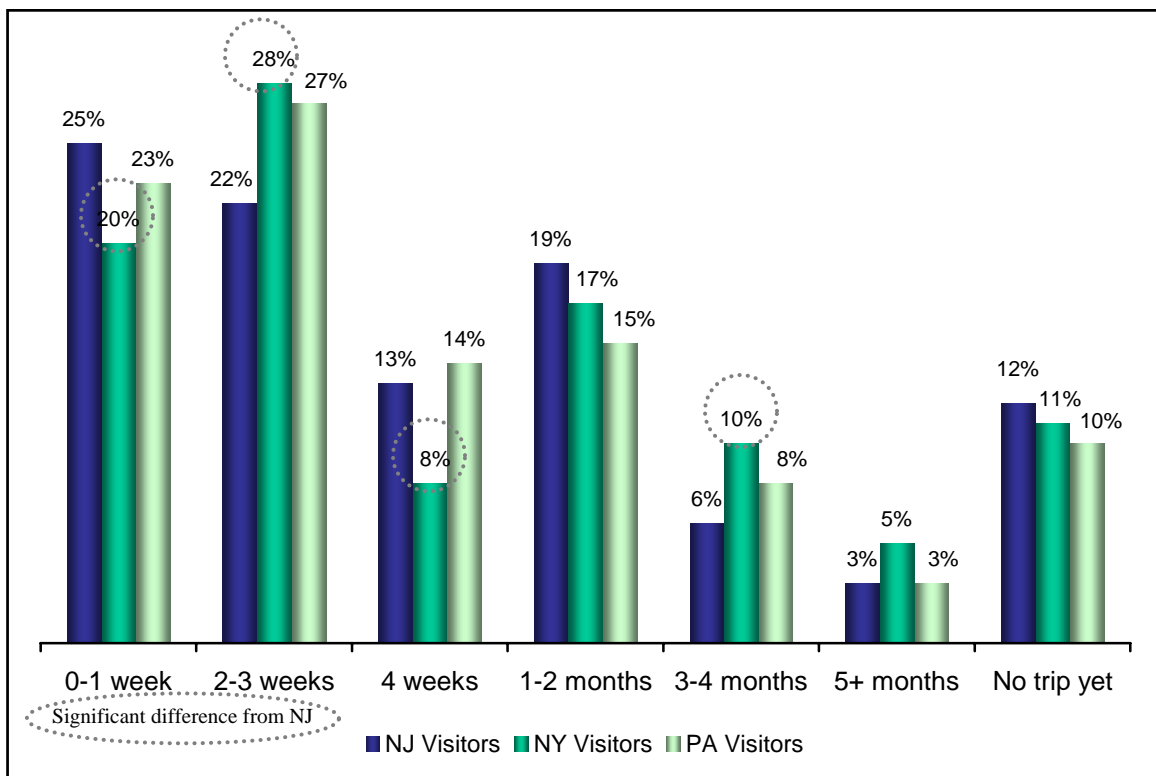
Travelers have many sources of information to choose from when researching travel destinations. Knowing what potential sources visitors use and expect when planning their trip will help destinations plan their marketing resources wisely by selecting the most effective travel planning tools.
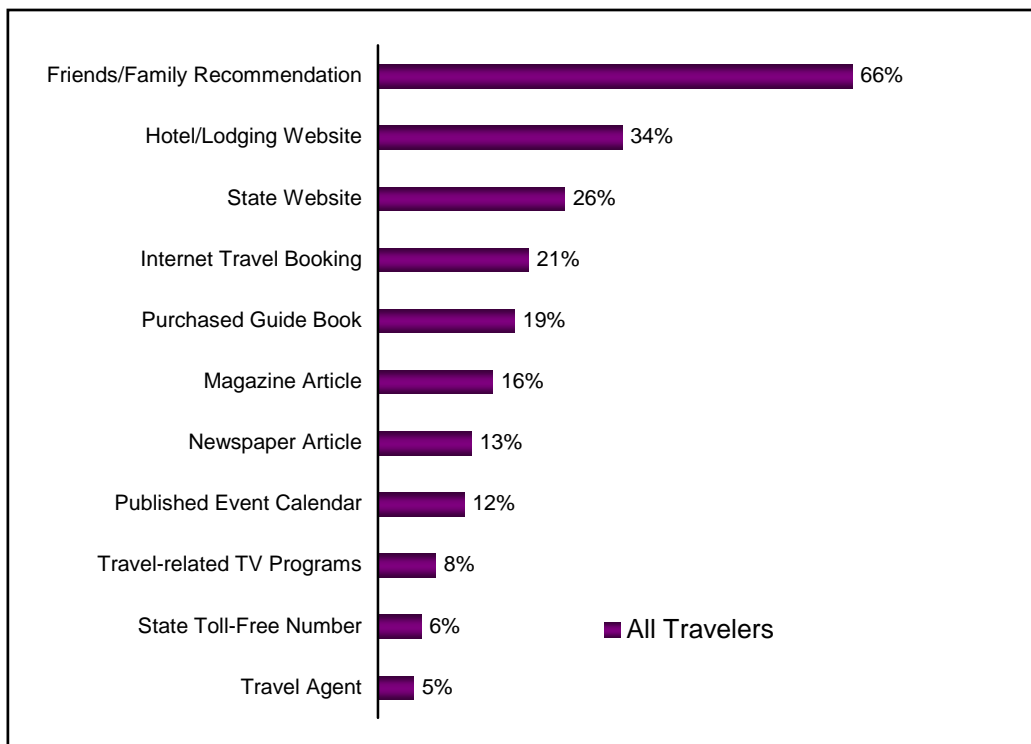
Well over half of travelers relied on recommendations from family and friends when planning their trips, 66%. When used as a travel planning resource, recommendations present a challenge to destinations because this channel of information cannot be controlled through marketing communications. Instead, destinations rely on the assumption that previous visitors enjoyed their leisure trip and the correct message is being conveyed through the referral network.

- Providing superior customer service to visitors will help promote and communicate a positive image and experience of a destination.
- Continuing the customer relationship via follow-up newsletters and promotions will also help properly position a destination within the referral network.

The Internet follows in rank as a primary resource for travel planning. Three types of Internet sites ranked as the most used:
- Hotel/lodging websites
- State websites
- Internet travel booking websites

Chart 5: Information sources used in trip planning
% of all travelers that used resource

Friends/Family Recommendation — 66%
Hotel/Lodging Website — 34%
State Website — 26%
Internet Travel Booking — 21%
Purchased Guide Book — 19%
Magazine Article — 16%
Newspaper Article — 13%
Published Event Calendar — 12%
Travel-related TV Programs — 8%
State Toll-Free Number — 6%
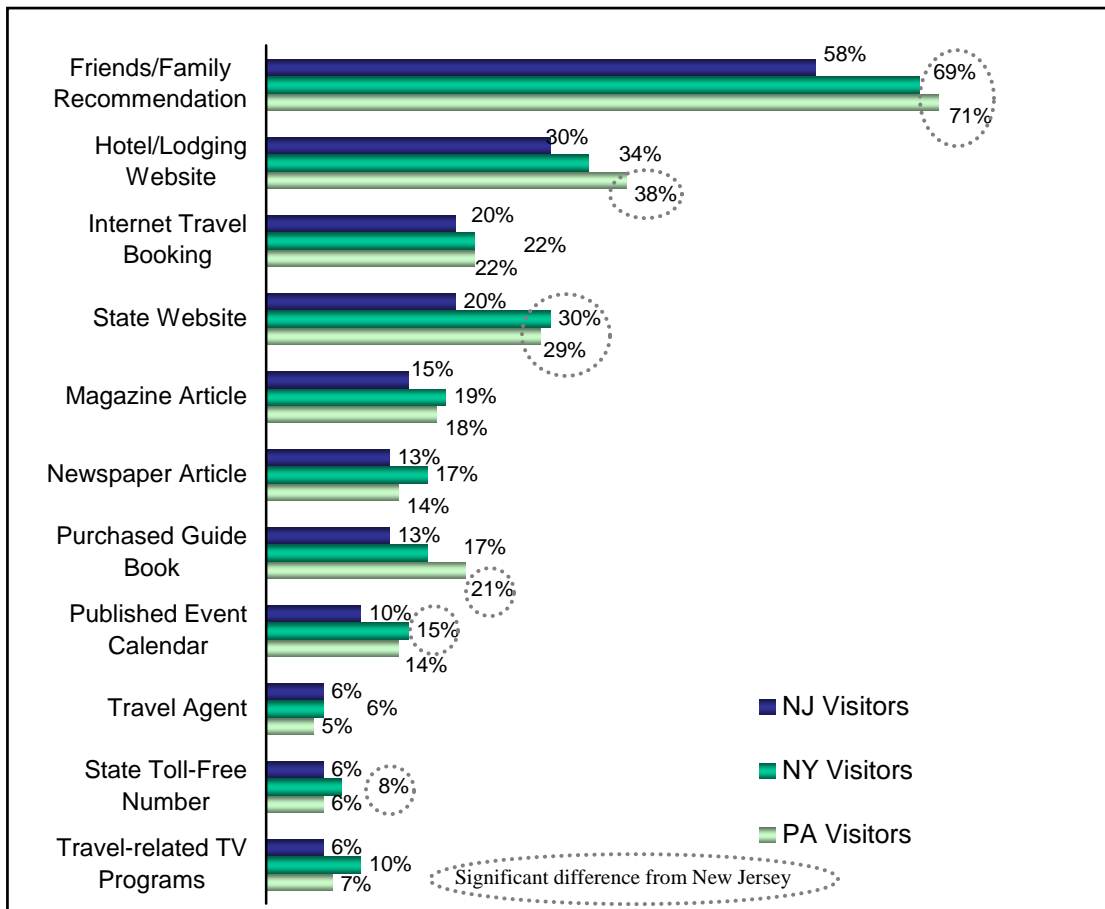Travel Agent — 5%

■ All Travelers

The following chart provides deeper detail on the travel planning resources New Jersey visitors use compared to non-visitors. Non-visitors are significantly more likely to use many of the travel planning resources available than New Jersey visitors. Because smaller shares of New Jersey visitors use the various planning tools, it indicates that they either feel educated on the tourism products available to them or they don't have proper access to these resources.

To meet the expectations of non-visitors, New Jersey needs to concentrate on the promotion and usability of the following sources:
- Recommendations
- Hotel/lodging websites
- State travel websites
- Guidebooks
- Event calendars
- TV programs

Chart 6: Travel planning resources used – New Jersey visitors vs. non-visitors
% of all travelers that used resource

While the Internet and recommendations from family and friends have the highest utility among travelers, travelers to New Jersey, New York, and Pennsylvania rate travel agents the highest in satisfaction ratings. High satisfaction ratings are also given to recommendations from families and friends, indicating traveler's satisfaction with personalized advice.
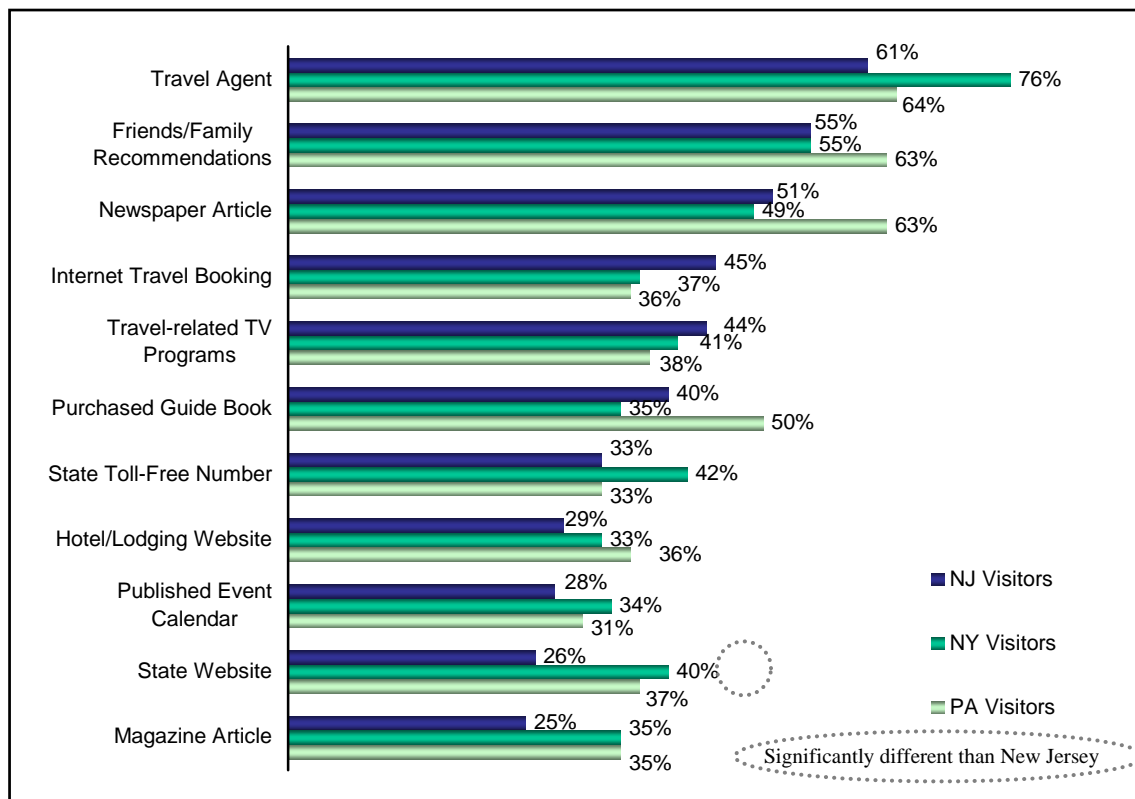
The chart below illustrates New Jersey visitors rating of the various travel planning resources used compared to ratings of non-visitors. The majority of New Jersey visitors gave the highest ratings to travel agents, personal recommendations, and newspaper articles. Ratings for all other sources are similar among visitors and non-visitors.

One exception is revealed in the ratings of the State travel website. Ratings were significantly lower among New Jersey visitors than non-visitors. Additionally, among all New Jersey travel planning resources, the State website was rated as one of the tools lowest in satisfaction.

> Because travelers give such high ratings to the personalized advice of travel agents or referrals from family and friends, NJOTT should consider improvements to the state travel website which would give travelers personalized service through targeted content and customer relationship management.

Chart 7: Information sources rated – New Jersey visitors vs. non-visitors
% of travelers giving high satisfaction ratings
(6 & 7 points on a 7-point scale)

Source	NJ Visitors	NY Visitors	PA Visitors
Travel Agent	61%	76%	64%
Friends/Family Recommendations	55%	55%	63%
Newspaper Article	51%	49%	63%
Internet Travel Booking	45%	37%	36%
Travel-related TV Programs	44%	41%	38%
Purchased Guide Book	40%	35%	50%
State Toll-Free Number	33%	42%	33%
Hotel/Lodging Website	29%	33%	36%
Published Event Calendar	28%	34%	31%
State Website	26%	40%	37%
Magazine Article	25%	35%	35%

Significantly different than New Jersey

In addition to travel planning resources such as effective websites, event calendars, or guidebooks, sales promotions can also be an effective way to attract visitors to a destination. Travelers were asked to indicate if any of a variety of promotional offers initiated a leisure trip or if they initiated an activity while already on a leisure trip. The details are illustrated in the chart below. Less than a quarter of travelers were *influenced* to travel by any of the promotional offerings. The top promotion to influence travel was for dining with a *buy one get one free* offer.

Likewise, a small percentage of travelers took advantage of in-market promotions. Offers for free meals was used by 28% of travelers and less than one-fifth of travelers used any of the other sales promotions.

Chart 8: Promotional offerings that initiated travel to a destination
% of travelers that took a trip because of a promotion/% of travelers that used promotions while already on a trip.
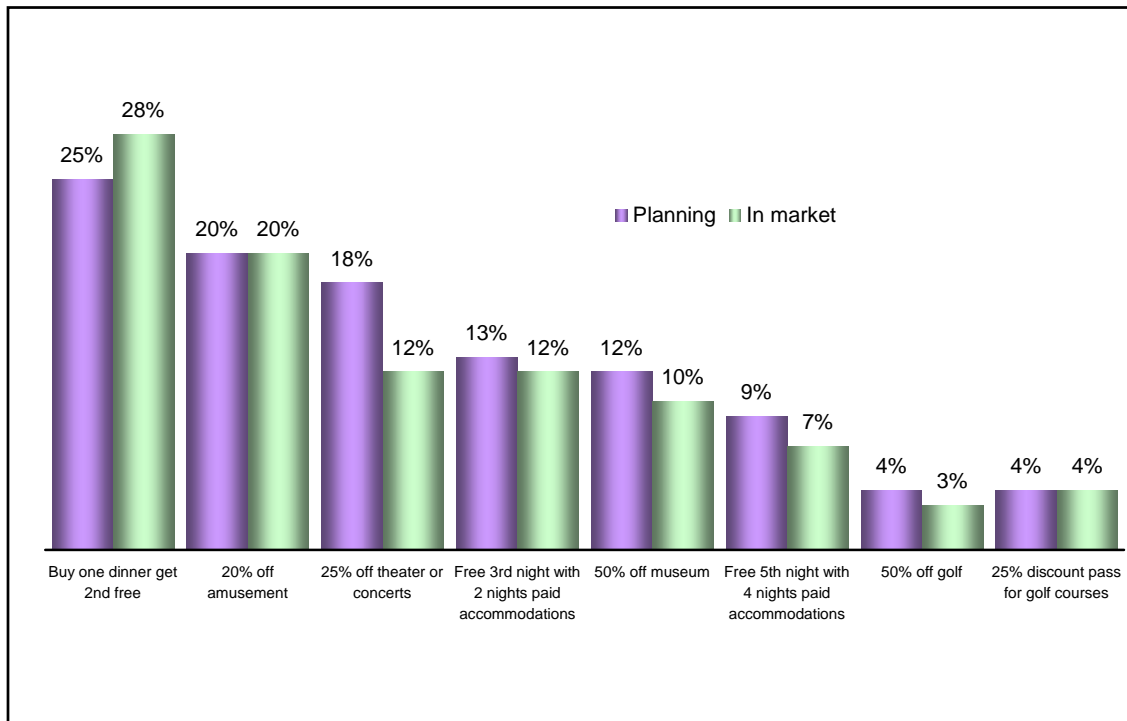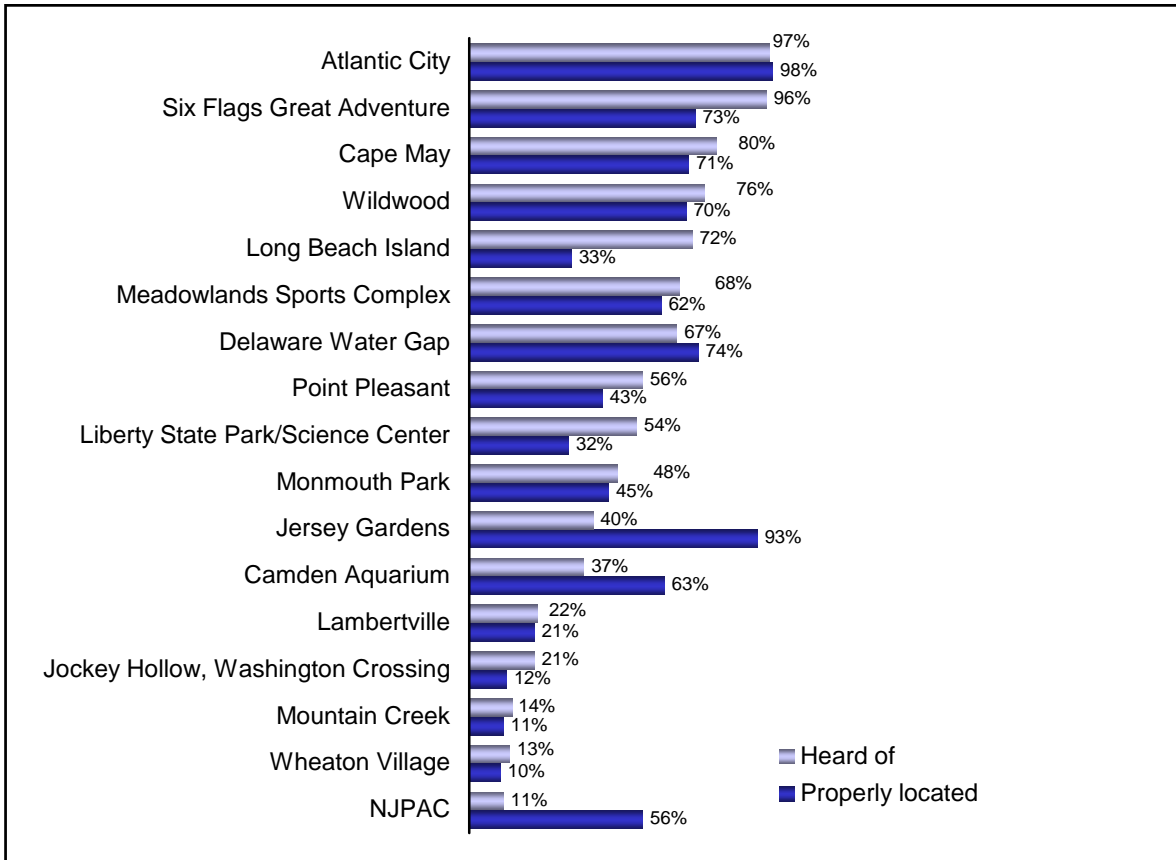
Awareness

To gauge how well known New Jersey attractions are among the key origin markets, travelers were asked to indicate if they heard of any of a series of attractions in New Jersey, New York, and Pennsylvania. To confirm the respondent's awareness, they were then asked to identify in what states they thought the attractions were located. The survey provided options of New Jersey, New York, Pennsylvania, or Don't Know.

Among New Jersey attractions and destinations, Atlantic City ranked the highest in awareness. Nearly three quarters of respondents had heard of and correctly located the following New Jersey destinations:

- Atlantic City
- Six Flags Great Adventure
- Cape May
- Wildwood

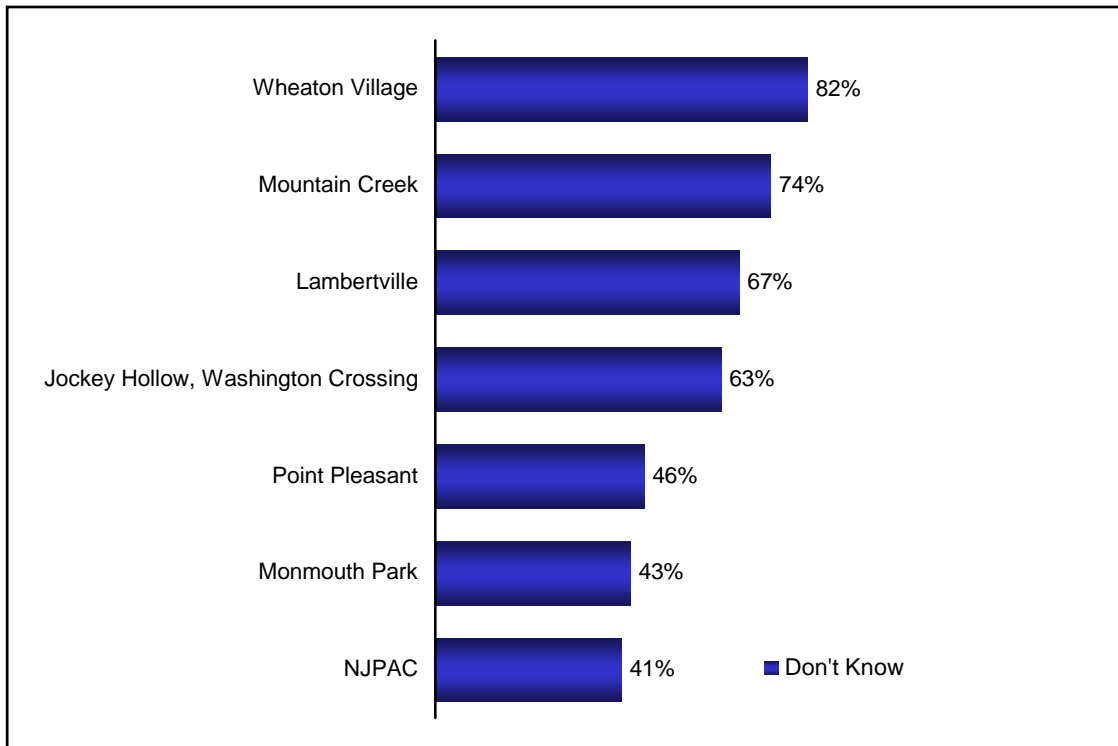**Chart 9: New Jersey destination awareness**
% of all travelers that heard of NJ destination/% of all travelers that properly located NJ destination

Destination	Heard of	Properly located
Atlantic City	97%	98%
Six Flags Great Adventure	96%	73%
Cape May	80%	71%
Wildwood	76%	70%
Long Beach Island	72%	33%
Meadowlands Sports Complex	68%	62%
Delaware Water Gap	67%	74%
Point Pleasant	56%	43%
Liberty State Park/Science Center	54%	32%
Monmouth Park	48%	45%
Jersey Gardens	40%	93%
Camden Aquarium	37%	63%
Lambertville	22%	21%
Jockey Hollow, Washington Crossing	21%	12%
Mountain Creek	14%	11%
Wheaton Village	13%	10%
NJPAC	11%	56%

While many of New Jersey's key attractions have high levels of awareness in the origin markets, some of the State's key cultural, historic, and outdoor recreation related destinations were unknown. The following chart reveals the destinations where respondents did not know the location, primarily by non-residents of New Jersey. Therefore, to develop and promote niche markets like culture, heritage, or outdoor recreation, increased promotion of these destinations is needed in the out-of-state origin markets.

Chart 10: New Jersey destinations with low awareness
% of travelers that did not know the location state of destination

| Destination	Don't Know
Wheaton Village	82%
Mountain Creek	74%
Lambertville	67%
Jockey Hollow, Washington Crossing	63%
Point Pleasant	46%
Monmouth Park	43%
NJPAC	41%

Activities

Certain aspects of a destination's image can be influenced by the top activities travelers participate in while visiting. The level of activity participation among visitors and non-visitors can also determine a destination's competitiveness. The attached chart reveals the top ten activities in which New Jersey visitors participate. Set against the competition, New Jersey excels in:

- Gaming, horse, and dog racing
- Beaches, lakes, rivers, and waterfront

However, for New Jersey's top ranked activities, New York and Pennsylvania provide strong competition for:

- Touring and sightseeing
- Festivals and craft fairs
- Visits to historic sites
- Museums and art exhibits

Chart 11: Top 10 New Jersey activities
% of all travelers that participated in activities
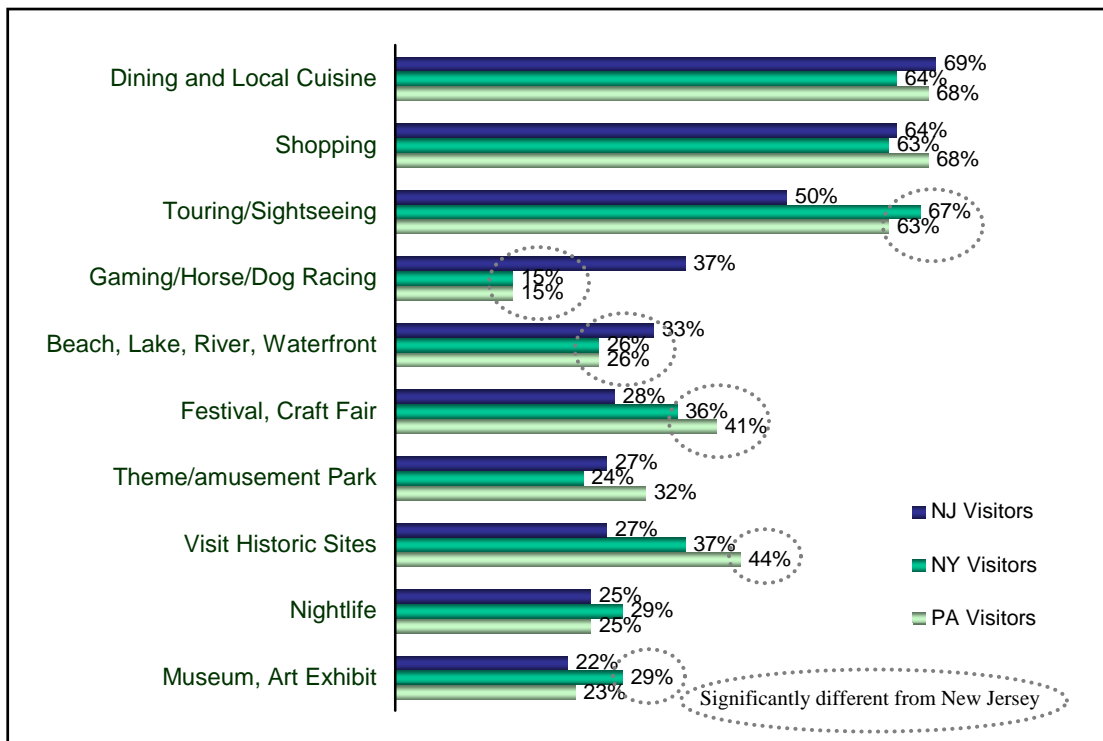
The table below provides a competitive context for all activities (22 surveyed) identified to be either a strength or weakness to New Jersey tourism promotion.

Table 2: New Jersey competitive assessment of activities

| New Jersey Activities versus the Competition			
<u>Strengths</u>		<u>Weakness</u>	
Gaming, horse/dog racing	Beaches, lakes, rivers, waterfront	Touring, sightseeing	Historic sites
		Museum, art exhibits	Festivals, craft fairs
		Live theater, Performing arts	Tours of historic buildings
		Hike, bike	Browsing antique and craft shops
		Attend local ethnic & cultural events	Live music, concerts

Image

A positive destination image can enhance promotional activities whereas a negative image can inhibit marketing messages. The survey measures New Jersey's image as a travel destination to illuminate the inherent strengths of the State and reveal misperceptions that could be a result of communication gaps.

All respondents were presented with a series of attributes in which they rated how well New Jersey, New York, or Pennsylvania were able to provide to travelers, based on all that they knew about the destination. The respondents were not required to have visited the state.

The following chart compares New Jersey's highest rated image attributes compared to the image ratings of New York and Pennsylvania. By far, New Jersey's beaches and gaming have better image ratings than the competition. As reported earlier in the report, these were also attributes that were rated high in awareness and accompanied by high participation rates.

Chart 12 – New Jersey's top image attributes
% of all travelers rating destination excellent (6 & 7 points on a 7-point scale)
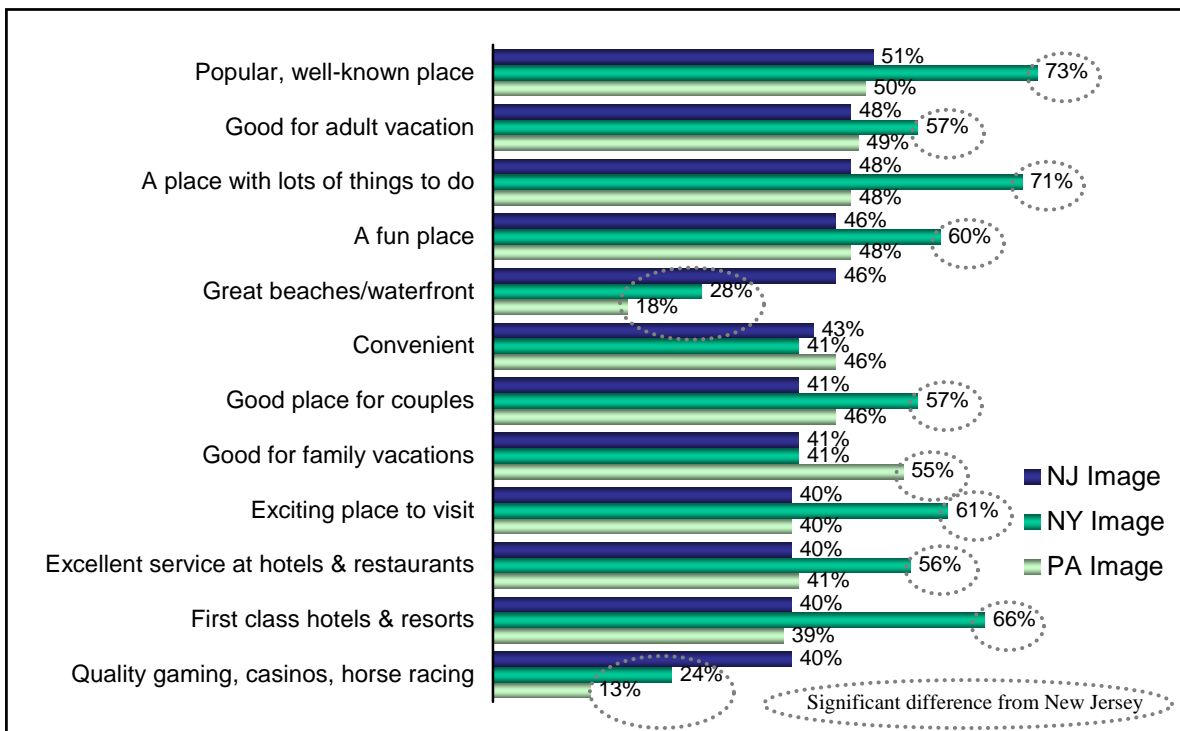
Additional detail on all of the attributes rated in the study is found in the following table.

New Jersey Image Strengths
- Beaches and waterfront
- Gaming

New Jersey Image Weaknesses
- Not a popular well-known place
- Not a place for an adult vacation
- Little to do
- Not a fun place
- Not a place for couples
- Not a place for a family vacation
- Not exciting
- Lower quality of service at hotels & restaurants
- Lower quality of hotels & resorts

Table 3: State image ratings - detail

% of all travelers rating destination travel image as excellent (6 & 7 points on a 7-point scale)

Underline indicates significant difference from New Jersey image

	NJ	NY	PA
Popular, well-known place	51%	73%	50%
A place with lots of things to do	48%	71%	48%
Good for adult vacation	48%	57%	49%
Great beaches/waterfront	46%	28%	18%
A fun place	46%	60%	48%
Convenient	43%	41%	46%
Good for family vacations	41%	41%	55%
Good place for couples	41%	57%	46%
Quality gaming, casinos, horse racing	40%	24%	13%
First class hotels & resorts	40%	66%	39%
Excellent service at hotels & restaurants	40%	56%	41%
Exciting place to visit	40%	61%	40%
Great overall scenic beauty/visual appeal	37%	52%	58%
High quality restaurant experience	37%	63%	45%
Easy to get from place to place	37%	42%	46%
Great nightlife	37%	64%	32%
Unique and interesting place	36%	61%	49%
Sightseeing	36%	59%	59%
Available info for local sites & events	35%	46%	45%
Good for boating/water sports	35%	27%	27%
Great overall destination quality	34%	50%	48%
High quality of shopping	34%	65%	46%
Theme parks, children's attractions	34%	26%	49%
A relaxing place to visit	34%	26%	48%
A place children will love	32%	32%	47%
Good place for singles	32%	50%	27%
Upscale atmosphere	31%	56%	31%
Provides good value for the money	30%	22%	40%
Outdoor sports & recreation	29%	32%	43%

	NJ	NY	PA
Friendliness of local residents	29%	23%	46%
Provides feeling of safety	28%	26%	46%
Good place for fishing	28%	24%	39%
Excellent live theater, music, concerts	27%	62%	29%
Famous historical sites	27%	53%	65%
Great fairs, festivals, & cultural events	27%	41%	43%
Nice climate/weather	27%	22%	32%
Luxurious	26%	54%	29%
A romantic place to visit	26%	40%	34%
Inexpensive and available parking	24%	18%	35%
Good public transportation	22%	46%	24%
Good place for camping	20%	23%	48%
Great art galleries, antique, & craft shops	19%	57%	40%
Quiet	19%	13%	38%
Great golf facilities	10%	19%	23%

To identify possible communication gaps in marketing messaging, one can compare image ratings of New Jersey among all travelers (whether or not they have ever been to the State) to the image ratings of travelers that have actually visited New Jersey. The list below identifies those attributes that have higher image ratings among New Jersey visitors to non-visitors and indicates areas where adequate product and service exist but where marketing communications can be improved.

- Great overall destination quality
- High quality restaurant experiences
- Quality gaming casinos & horse racing
- Easy to get from place to place
- First class hotels and resorts

- A relaxing place to visit
- Upscale atmosphere
- A fun place
- Popular, well-known place
- Good for boating & water sports
- Good place for fishing

Finally, to see how well a destination's image meets the expectations that travelers seek on a leisure vacation, we'll compare the criteria that travelers seek to each destination's image rating. The following chart reveals that all three destination's studied fell short in how well their image met the top criteria travelers seek when taking a leisure trip.
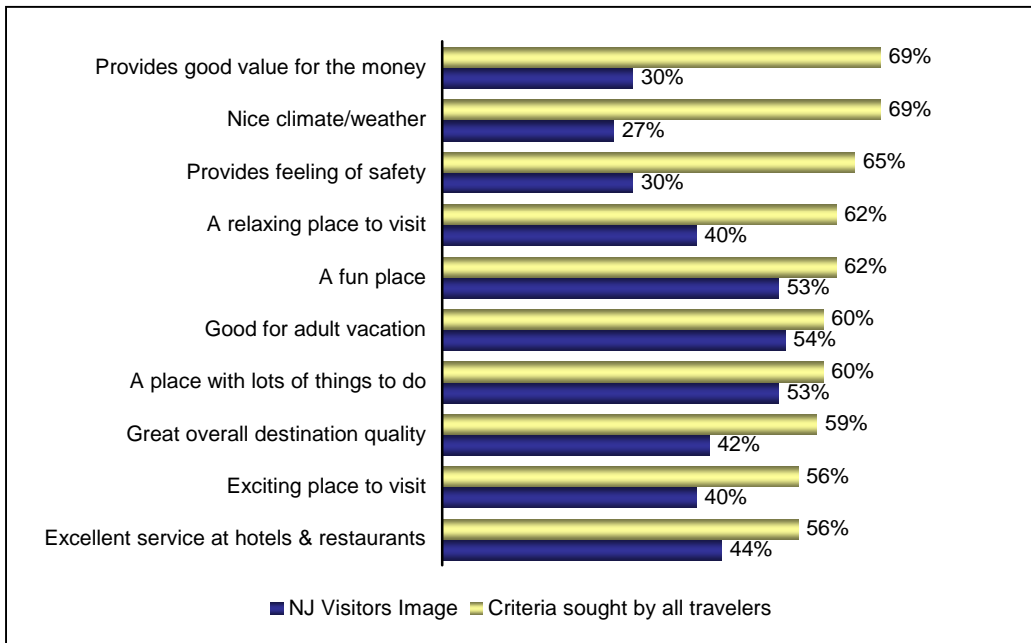
Chart 13 – Image ratings compared to criteria for leisure travel
% of all travelers rating attributes high (6& 7 points on a 7-point scale)
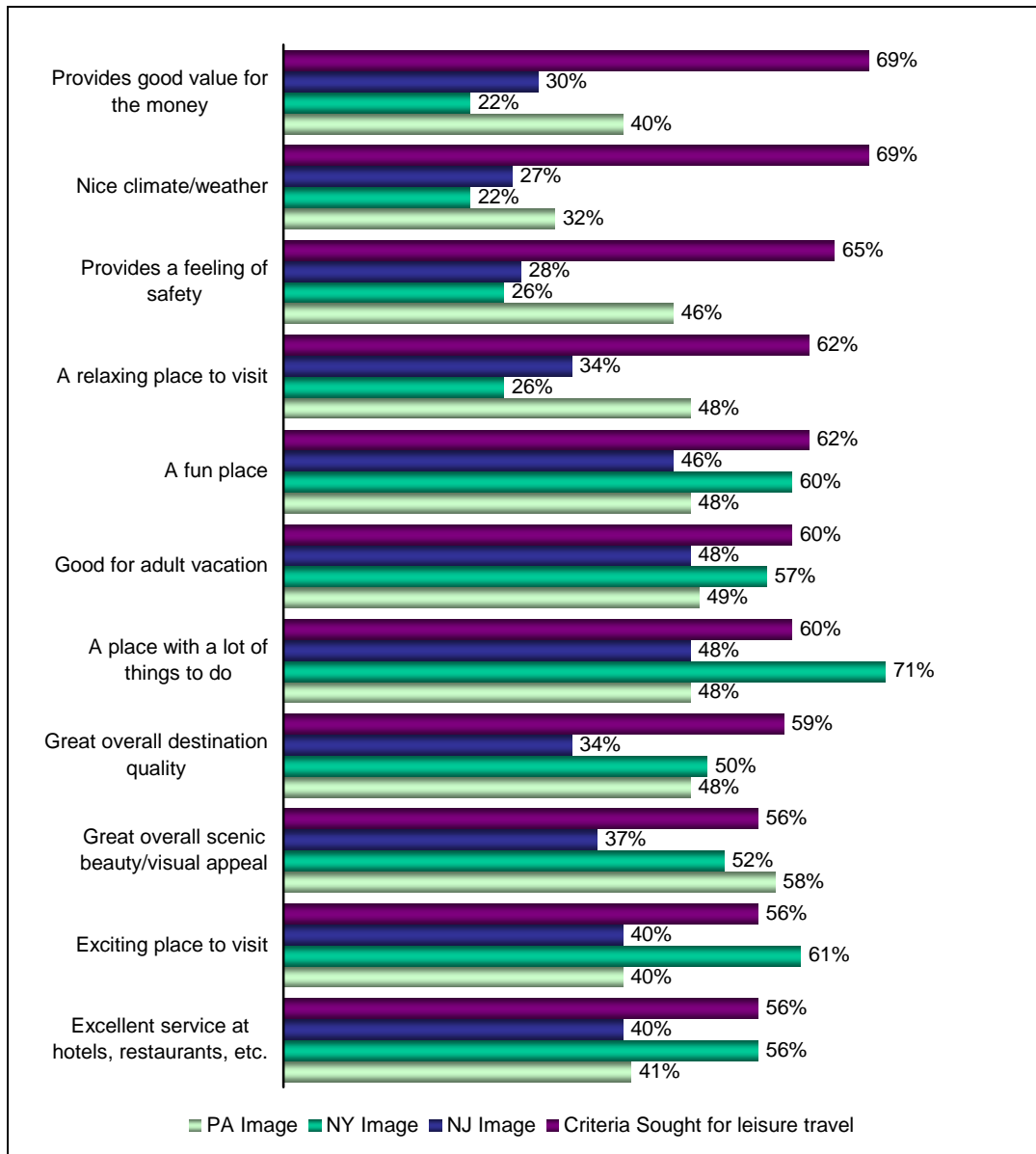
While many of New Jersey's image ratings fall short of the purpose for leisure travel among all travelers, New Jersey visitors rate many of the items high, almost meeting several of the core reasons travelers take a leisure trip. New Jersey can be successful in delivering on the following core reasons for leisure travel

- Fun   - Variety   - Good adult vacation options

Chart 14 – New Jersey visitor's image compared to leisure travel purpose
% of NJ visitors rating NJ image high/% of all travelers rating travel purpose high
(6 & 7 points on a 7-point scale)

Category	NJ Visitors Image	Criteria sought by all travelers
Provides good value for the money	30%	69%
Nice climate/weather	27%	69%
Provides feeling of safety	30%	65%
A relaxing place to visit	40%	62%
A fun place	53%	62%
Good for adult vacation	54%	60%
A place with lots of things to do	53%	60%
Great overall destination quality	42%	59%
Exciting place to visit	40%	56%
Excellent service at hotels & restaurants	44%	56%

■ NJ Visitors Image   ▫ Criteria sought by all travelers

Intent to Return and Recommend

Finally, to see how well New Jersey and the competing destinations deliver on meeting traveler's needs, the survey asked respondents on their intent to return for a leisure trip as well as their likelihood of recommending the destination to friends and family.

New Jersey scored very well against the competition for intent to return. The vast majority of New Jersey visitors (77%) indicated that they would return to the State for a leisure vacation (6 & 7 on a 7 point scale). When looking solely at the highest rating, 7 points, New Jersey had a significantly higher share of top ratings (64%) than the competition.

However, New Jersey is a closely guarded leisure getaway. While the majority of New Jersey visitors plan to return to the State, a smaller share would refer it to family or friends, only 58%. This can be problematic considering the majority of travelers that use referrals from friends or family when planning a leisure trip. As suggested earlier in this study, it is important to also influence the referral network by encouraging the visitors that plan to return to New Jersey to also recommend it to family or friends.

Chart 15 – Intent to return and recommend
% of travelers that would return to state/% of travelers that would recommend state to friends or family (6 & 7 points on a 7-point scale)
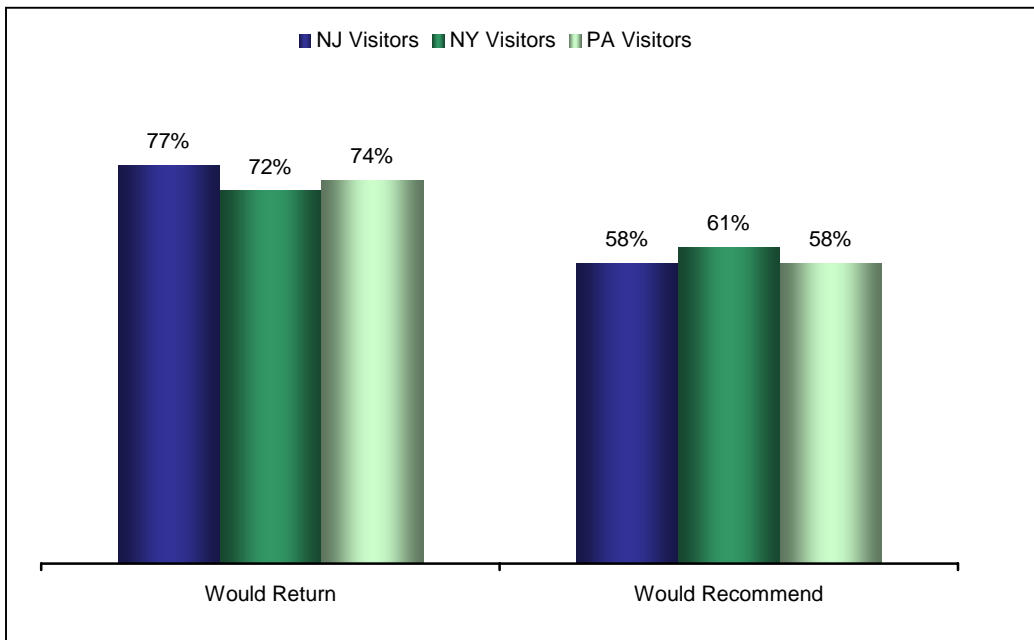
Trip Planning

New Jersey visitors are not using planning resources to the degree of non-visitors. It is important to increase promotion and utility of:
- Hotel/lodging websites
- State travel website
- State guidebooks
- Event calendars

The Internet is the top source for travel information
- Strategic linking of visitnj.org with local hotel/lodging websites and Internet travel booking sites will help increase awareness and improve the image of New Jersey as a travel destination.
- Search engine optimization for key travel products will also help increase awareness of New Jersey's diverse product offerings.

A large share of visitors get their travel information from referrals. As such, destinations need to influence that message with:
- Excellent customer service
- Visitor follow-up

Visitnj.org's satisfaction ratings suffered against the competitive websites as well as against other New Jersey travel planning resources
- The visitnj.COM website may be damaging the user experience as well as interfering with the awareness of New Jersey tourism products. (users may be confusing the .com and .org extensions)
- Evaluate best practices. New York received the highest satisfaction ratings of all three states studied, however, scores could be higher. Look outside the competitive set for best practices among the destination marketing organizations nationwide.
- Consider in-depth research of visitnj.org for content and usability.
- Extend website capabilities to offer personalized service.

Awareness & Image

New Jersey's key cultural, historic, and outdoor recreation destinations had the lowest share of awareness, primarily among non-residents. Likewise, New Jersey had a small share of positive image ratings for these activities.

Marketing activities are working for the strong awareness attractions (Atlantic City, Great Flags, Cape May) but marketing needs to be augmented for lesser-known attractions.
- In-market promotions for nearby cultural, historic, and outdoor recreation attractions.
- Call to action to revisit the lesser-known attractions.
- Develop suggested itineraries that combine strong awareness attractions with the low awareness attractions.

Combat the misperceptions
- Highlight what your visitors already know about New Jersey.
  - Great overall destination quality
  - High quality restaurant experiences
  - Quality gaming casinos & horse racing
  - Easy to get from place to place
  - First class hotels and resorts
  - A relaxing place to visit
  - Upscale atmosphere
  - A fun place
  - Popular, well-known place
  - Good for boating & water sports
  - Good place for fishing
- Educate your current and potential visitors on what they don't know about New Jersey's cultural, historic, and outdoor recreation activities.

Survey Methodology

Survey instrument: A questionnaire containing 13 questions.

Method: online survey

Sampling frame: Synovate consumer opinion online panel members residing in the states of CT, MD, NJ, NY, and PA. Qualified respondents took a leisure trip to NJ, NY or PA in the last 12 months or planned to take a leisure trip to NJ, NY, or PA in the next 12 months.

Timeframe: May 11-13, 2005

Sample Size: A total of 949 qualified respondents completed the survey. The following is the distribution of respondents that have visited or plan to visit NJ, NY, or PA. This will not total 949 as respondents could have taken a trip to multiple states.
> NJ = 498
> NY = 552
> PA = 561

Response Rate: 19% of all panel members responded to the survey – 50% qualified as a traveler to NJ, NY, or PA.

Data Processing: Survey respondents were weighted by the following factors to maintain a balanced and representative response from the different groupings:
- Origin state
- Age
- Income
- Education
- Number of adults in household

Data analysis was conducted with cross-tabulations and significance testing.

Survey Questionnaire

The following is a copy of the electronic version of the survey questionnaire.

Greetings from Consumer Opinion Panel!

Thank you for taking the time to participate in this online travel study. Travel is an interesting topic and we hope you will enjoy our survey.

Your opinions are very important and, as always, completely confidential.

To begin, just click on the "Next" button below. This will take you right into today's survey.

Cordially,

Marie

Marie Brighton
Panel Director

We need to have the person in your household who travels the most fill out this survey. Please have that person fill out this survey.

If this person is not available at this time, please SAVE THE E-MAIL INVITATION you received for this study. When this member of your household is available to complete the survey, you will be able to re-enter the survey to resume from this point. If possible, please complete the survey in the next few days.

SCREENER

Have you traveled to or within New Jersey, New York, or Pennsylvania for a leisure trip in the past 12 months or plan to take a leisure trip to any of these states next 12 months?

       [ ] New Jersey

       [ ] New York

       [ ] Pennsylvania

REASONS FOR LEISURE TRAVEL

The following questions are related to leisure travel in general, so please think about any leisure trip that you have taken.

1- Please think about your usual reasons for taking a leisure trip to *any* destination. Please rate how important each of the following reasons were in your decision to select the destinations you like to visit using the scale below. Use any number on the scale below

Not at All Important						Extremely Important
1	2	3	4	5	6	7

Reasons for Travel
- a. Learn something new _____
- b. Challenge myself physically _____
- c. Allows me to reduce stress _____
- d. Experience excitement _____
- e. Experience a sense of adventure _____
- f. Experience solitude _____
- g. To reconnect with myself/spirit _____
- h. Gets me re-energized _____
- i. To reconnect with friends or family _____

SELECTION PROCESS

2 - The next five pages list various characteristics people consider when choosing a place to visit for a leisure trip. Listed below are characteristics people consider when choosing a place to visit for a leisure trip. Please indicate how important you think each characteristic is in choosing a destination for a leisure trip by rating it using the scale below.

Not at All Important					Extremely Important	
1	2	3	4	5	6	7

a.   Great overall destination quality _____
b.   Great overall scenic beauty/visual appeal _____
c.   Unique and interesting place _____
d.   High quality restaurant experiences _____
e.   High quality of shopping _____
f.   Theme parks/children's attractions _____
g.   Great golf facilities _____
h.   Quality gaming casinos/horse racing _____
i.   Easy to get from place to place _____
j.   Great beaches/waterfront _____
k.   Excellent live theater/music/concerts _____
l.   First class hotels & resorts _____
m.   Famous historical sites _____
n.   Great fairs, festivals & cultural events _____
p.   Great art galleries, antique/craft shops _____
q.   Good public transportation _____
r.   Luxurious _____
s.   Quiet _____
t.   Available info for local sites/events _____
u.   Excellent service at hotels, restaurants, etc. _____
v.   Sightseeing _____
w.   Good for family vacations _____
x.   A place children will love _____
y.   A relaxing place to visit _____
z.   Outdoor sports and recreation _____
aa.   A romantic place to visit _____
bb.   Inexpensive and available parking _____
cc.   Upscale atmosphere _____
dd.   Great Night Life (entertainment) _____
ee.   A fun place _____
ff.   A place with a lot of things to do _____
gg.   Convenient _____
hh.   Good place for couples _____
ii.   Good place for singles _____
jj.   Provides feeling of safety _____
kk.   Good for adult vacation _____
ll.   Friendliness of local residents _____
mm.   Popular, well-known place _____
nn.   Exciting place to visit _____
oo.   Nice climate/weather _____
pp.   Good for boating, water sports _____
qq.   Good place for camping _____
rr.   Good place for fishing _____
ss.   Provides good value for the money _____

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TRIP PLANNING

Now we'd like to learn more about how you plan your leisure trips. Please answer the following questions about your leisure trips in general.

3- About how far in advance do you plan a leisure trip for a vacation? Select one response.

0-1 week	☐	2-3 weeks	☐	4 weeks	☐
1-2 months	☐	3-4 months	☐	5+ months	☐

4- About how far in advance do you plan a leisure trip for a weekend get-a-way? Select one response.

0-1 week	☐	2-3 weeks	☐	4 weeks	☐
1-2 months	☐	3-4 months	☐	5+ months	☐

5- Below is a list of various promotional offerings for travel-related activities.

a – In the last year did you decide to take a trip simply to take advantage of any of the following types of offers listed below? Please mark Yes or No in Column A.

b - While on a trip that you *already* decided to take, did you take advantage of any of the following types of offers while at the destination? Please mark Yes or No in Column B.

		A Yes/No	B Yes/No
a.	Free third night stay at a hotel or bed and breakfast with the purchase of two nights	_____	_____
b.	Free fifth night stay at a hotel or bed and breakfast with the purchase of four nights	_____	_____
c.	A 25% discount pass for multiple golf courses	_____	_____
d.	Discount of 50% off a museum admission	_____	_____
e.	50% off a round of golf	_____	_____
f.	Buy one dinner and get the second free offer at a fine dining restaurant	_____	_____
g.	Discount of 25% off admission to a theater show or concerts	_____	_____
h.	Discount of 20% off admission to an amusement park	_____	_____

AWARENESS

Following is a list of places to visit in your local area. We would like to know how familiar you are with these places. Please answer the following three questions.

6 –
a – Have you ever heard of any of the places listed below? Please mark Yes or No in Column A.
b – Of the places listed below, write in the state in your local area in which you think it is located in Column B. Please use the following number codes:

      1 – Pennsylvania   2- New Jersey   3 – New York   0 – Don't Know

c – Of the places you have heard of below, which ones have you actually visited?
[FOR EACH LOCATION WITH A YES IN COL A, THEN SELECT YES OR NO IN COL C].

		A Yes/No	B State Located	C Yes/No
a.	Atlantic City	_____	_____	_____
b.	Cape May	_____	_____	_____
c.	Wildwood	_____	_____	_____
d.	Long Beach Island	_____	_____	_____
e.	The Hamptons	_____	_____	_____
f.	Liberty State Park/Science Center	_____	_____	_____
g.	Mountain Creek	_____	_____	_____
h.	Monmouth Park	_____	_____	_____
i.	Adirondacks	_____	_____	_____
j.	Meadowlands Sports Complex	_____	_____	_____
k.	Camden Aquarium	_____	_____	_____
l.	Statue of Liberty/Ellis Island	_____	_____	_____
m.	Lambertville	_____	_____	_____
n.	Independence Hall	_____	_____	_____
o.	Delaware Water Gap	_____	_____	_____
p.	Point Pleasant	_____	_____	_____
q.	Hershey Park	_____	_____	_____
r.	Jersey Gardens	_____	_____	_____
s.	Museum of Natural History	_____	_____	_____
t.	Jockey Hollow, Washington Crossing	_____	_____	_____
u.	Six Flags Great Adventure	_____	_____	_____
v.	Wheaton Village	_____	_____	_____
w.	NJPAC	_____	_____	_____
x.	Poconos	_____	_____	_____
y.	Valley Forge	_____	_____	_____
z.	Lake George	_____	_____	_____
aa.	Saratoga Springs	_____	_____	_____
bb.	Catskills	_____	_____	_____

You indicated that you took a trip or plan to take a trip to <DESTINATION>. The following questions will ask you about <DESTINATION>, specifically.

7- If you took at trip to <DESTINATION> in the last 12 months, about how far in advance did you start to plan it? Select one response.

0-1 week	☐	2-3 weeks	☐	4 weeks	☐
1-2 months	☐	3-4 months	☐	5+ months	☐

[SKIP TO QU8A]

I did not take the trip yet ☐
[SKIP TO Q7A]

7A - If you are planning to take a trip to <DESTINATION> in the next 12 months, about how far in advance will you start planning it? Select one response.

0-1 week	☐	2-3 weeks	☐	4 weeks	☐
1-2 months	☐	3-4 months	☐	5+ months	☐

[SKIP TO 8C]

INFORMATION SOURCES

We would like to learn more about what sources of information you used or plan to use in planning your trip to <DESTINATION> and how useful you think they are.

8a - Please indicate which sources of information you used in planning your trip to <DESTINATION>.

		Used	Not Used
a.	State website..................................._____		_____
	(NJ version will have www.visitnj.org)		
b.	Purchased <DESTINATION> Guide Book	_____	
c.	Published Event Calendar .... ____		_____
d.	State toll-free number................... ____		_____
	(NJ version will have 1-800-visitnj)		
e.	Hotel/Lodging Web site............... ____		_____
f.	Internet Travel Booking............... ____		_____
g.	Travel Agent .... ____		_____
h.	Magazine Article........................... ____		_____
i.	Newspaper Article .... ____		_____
j.	Friends/Family Recommendation. ___		_____
k.	Travel related TV programs .... ____		_____

8b - Of the information sources you used in planning your trip, please rate them using the Expectation Scale below. [LIST ONLY THOSE USED IN Q8A].

Fell Far Below My Expectations			Matched My Expectations			Far Exceeded My expectations
1	2	3	4	5	6	7

a.   State website................................._____
     (NJ version will have www.visitnj.org)
b.   Purchased <DESTINATION> Guide Book
c.   Published Event Calendar .... ____
d.   State toll-free number.................. ____
     (NJ version will have 1-800-visitnj)
e.   Hotel/Lodging Web site............... ____
f.   Internet Travel Booking............... ____
g.   Travel Agent .... ____
h.   Magazine Article........................... ____
i.   Newspaper Article .... ____
j.   Friends/Family Recommendation. __
k.   Travel related TV programs......... ____

8c – Please indicate each information source you plan to use when planning your trip to <DESTINATION>.

Select as many as apply   <u>Plan to use</u>

a.   State website.................................
     (NJ version will have www.visitnj.org)
b.   Purchased <DESTINATION> Guide Book
c.   Published Event Calendar ....
d.   State toll-free number..................
     (NJ version will have 1-800-visitnj)
e.   Hotel/Lodging Web site...............
f.   Internet Travel Booking...............
g.   Travel Agent ....
h.   Magazine Article...........................
i.   Newspaper Article ....
j.   Friends/Family Recommendation.
k.   Travel related TV programs.........

DAY TRIPS

9- Thinking about leisure day trips you have taken to <DESTINATION> in the past three months please indicate the total number of leisure day trips you have taken during that time.

None   ☐   1 trip   ☐   2-3 trips   ☐   4 or more trips ☐

ACTIVITY PARTICIPATION

10- Please check (✓) in Column A for each activity you participated in or plan to participate in while visiting <DESTINATION>.

In Column B, please check (✓) each activity that was an important reason for your trip or will be an important reason for your trip.

		A Participation In activity	B Important reason for trip
a.	Touring/Sightseeing	_____	_____
b.	Look at real estate	_____	_____
c.	Visit historic site	_____	_____
d.	Museum, art exhibit, etc	_____	_____
e.	Festival, craft fair, etc	_____	_____
f.	Nightlife	_____	_____
g.	Gaming/horse/dog racing	_____	_____
h.	Watch sports event	_____	_____
i.	Dining and local cuisine	_____	_____
j.	Live theater/performing arts	_____	_____
k.	Tour historic buildings	_____	_____
l.	Golf	_____	_____
m.	Hike, bike, etc	_____	_____
n.	Health spa/resort	_____	_____
o.	Beach/lake/river/waterfront	_____	_____
p.	Boating/sailing/kayaking/water skiing	_____	_____
q.	Attend show: boat, car, home, etc	_____	_____
r.	Theme/amusement park	_____	_____
s.	Shopping	_____	_____
t.	Browse antique/craft shops	_____	_____
u.	Attend local ethnic cultural events	_____	_____
v.	Live music/concert	_____	_____

COMPETITIVE RATINGS

11 - *(PLEASE RATE EACH DESTINATION ACROSS EACH CHARACTERISTIC)*
Rate your opinion of the following destination's performance for the characteristics listed below, based upon everything you have seen, heard or experienced about the destination, *even if you have never visited it.* Use a scale from 1 up to 7 where 1=*Does not deliver* up to 7=*Delivers extremely well.* Rate based upon your experiences and impressions. Remember, you need *not* have visited an area to have an impression.

[Comp Set will rotate randomly among respondents]

	NJ	**NY**	**PA**
a. Great overall destination quality	____	____	____
b. Great overall scenic beauty/visual appeal	____	____	____
c. Unique and interesting place	____	____	____
d. High quality restaurant experiences	____	____	____
e. High quality of shopping	____	____	____
f. Theme parks/children's attractions	____	____	____
g. Great golf facilities	____	____	____
h. Quality gaming casinos/horse racing	____	____	____
i. Easy to get from place to place	____	____	____
j. Great beaches/waterfront	____	____	____
k. Excellent live theater/music/concerts	____	____	____
l. First class hotels & resorts	____	____	____
m. Famous historical sites	____	____	____
n. Great fairs, festivals & cultural events	____	____	____
o. Great art galleries, antique/craft shops	____	____	____
p. Good public transportation	____	____	____
q. Luxurious	____	____	____
r. Quiet	____	____	____
s. Available info for local sites/events	____	____	____
t. Excellent service at hotels, restaurants, etc.	____	____	____
u. Sightseeing	____	____	____
v. Good for family vacations	____	____	____
w. A place children will love	____	____	____
x. A relaxing place to visit	____	____	____
y. Outdoor sports and recreation	____	____	____
z. A romantic place to visit	____	____	____
aa. Inexpensive and available parking	____	____	____
bb. Upscale atmosphere	____	____	____
cc. Great Night Life (entertainment)	____	____	____
dd. A fun place	____	____	____
ee. A place with a lot of things to do	____	____	____
ff. Convenient	____	____	____
gg. Good place for couples	____	____	____
hh. Good place for singles	____	____	____
ii. Provides feeling of safety	____	____	____
jj. Good for adult vacation	____	____	____
kk. Friendliness of local residents	____	____	____
ll. Popular, well-known place	____	____	____
mm. Exciting place to visit	____	____	____
nn. Nice climate/weather	____	____	____
oo. Good for boating, water sports	____	____	____
pp. Good place for camping	____	____	____
qq. Good place for fishing	____	____	____
rr. Provides good value for the money	____	____	____

[FOR THOSE THAT ANSWERED A PLANNING TIMEFRAME IN QU 7 CONTINUE. FOR THOSE THAT DID NOT TAKE THE TRIP YET, END]

INTENT TO RETURN

12 - Please rate your intent to return to <DESTINATION> for a leisure trip on a scale of 1 to 7 where 1 = definitely would not return and 7= would definitely return.

Definitely would not return			Uncertain			Definitely would return
1	2	3	4	5	6	7

Intent to return to <DESTINATION> for a leisure trip.   _____

REFERRALS

13 - Would you recommend <DESTINATION> as a leisure vacation destination to a friend or relative?

Definitely would not recommend			Uncertain			Definitely would recommend
1	2	3	4	5	6	7

Intent to recommend <DESTINATION> to friends or family for a leisure trip. _____

Day Trips Taken

The following chart displays the results of Question #9 which inquired about the frequency of day-trips in the last 3 months.

Number of day-trips taken in last three months (Feb – Apr 2005)