



2007 Visitor Profile

NEW JERSEY



Presented by:

Cheryl Schutz
Vice President, Account
Services

May 16, 2008

About DKSA



- Founded in 1982 by Douglas Shifflet
- Largest historical consumer travel database
- Domestic travel data for States, Cities, Attractions, Accommodations, Transportation
- Customized client research (image, ROI, etc.)
- Clients
 - ↪ Destinations (including New Jersey since 2003)
 - ↪ Hotel organizations
 - ↪ U.S. Department of Commerce, Travel Associations

Destination Marketing Model



Market
Assessment

How many visitors?



Targeting

Who are they?



Positioning

What do they do here?



Communicating

Where is the opportunity?

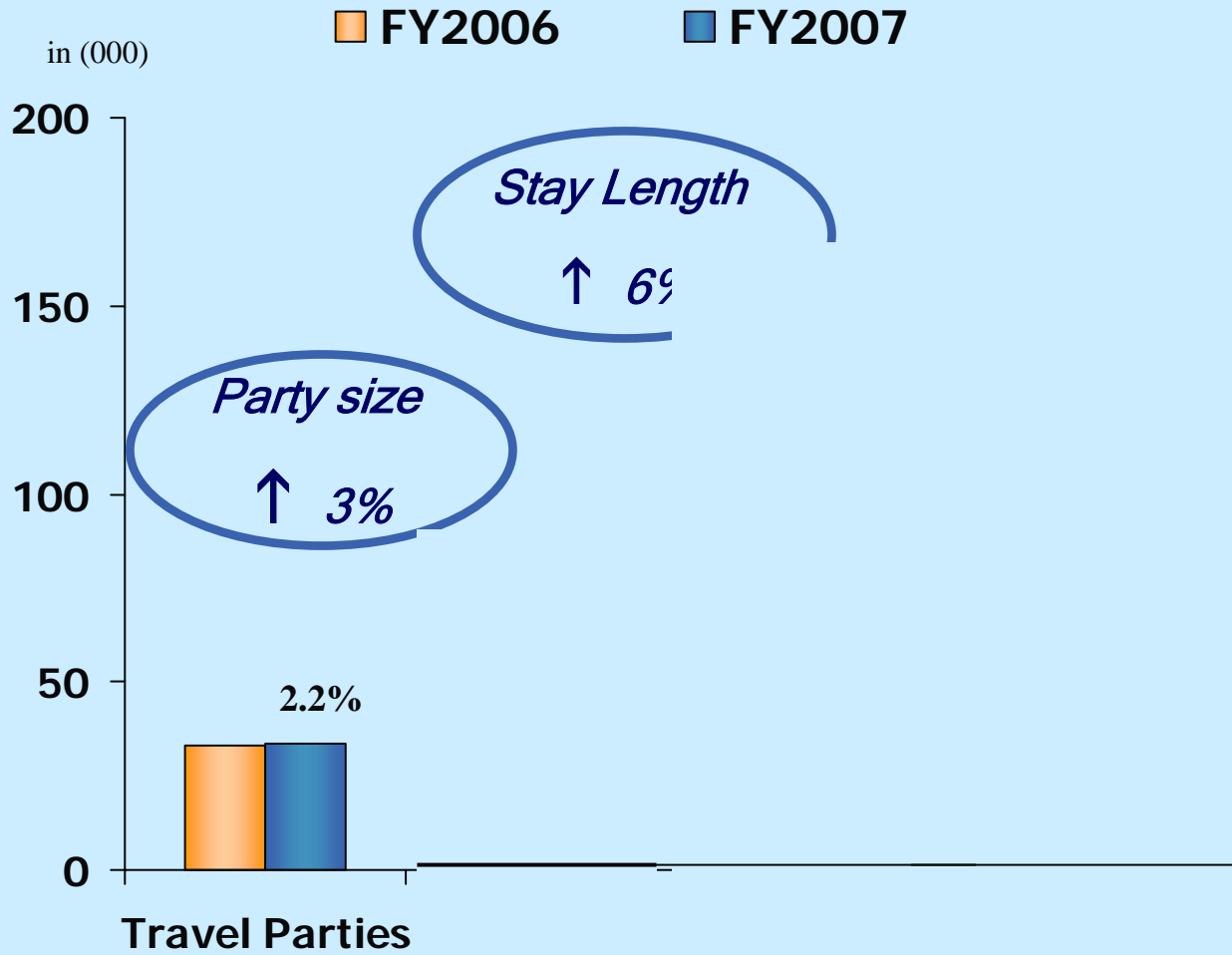
How many visit New Jersey?



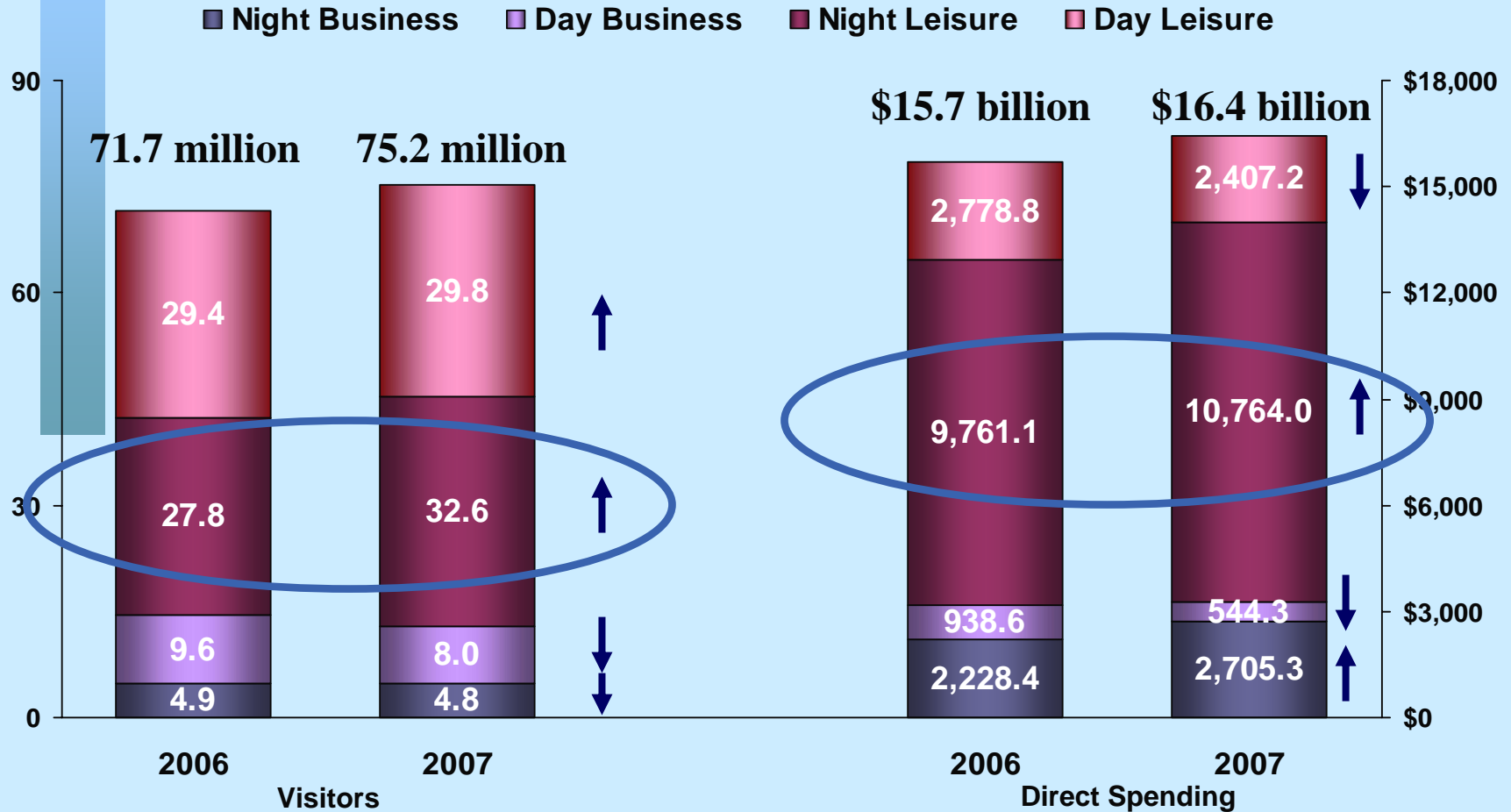
In 2007.....

- New Jersey hosted a record **75.2** million visitors
- Spending a record **\$16.4** billion dollars

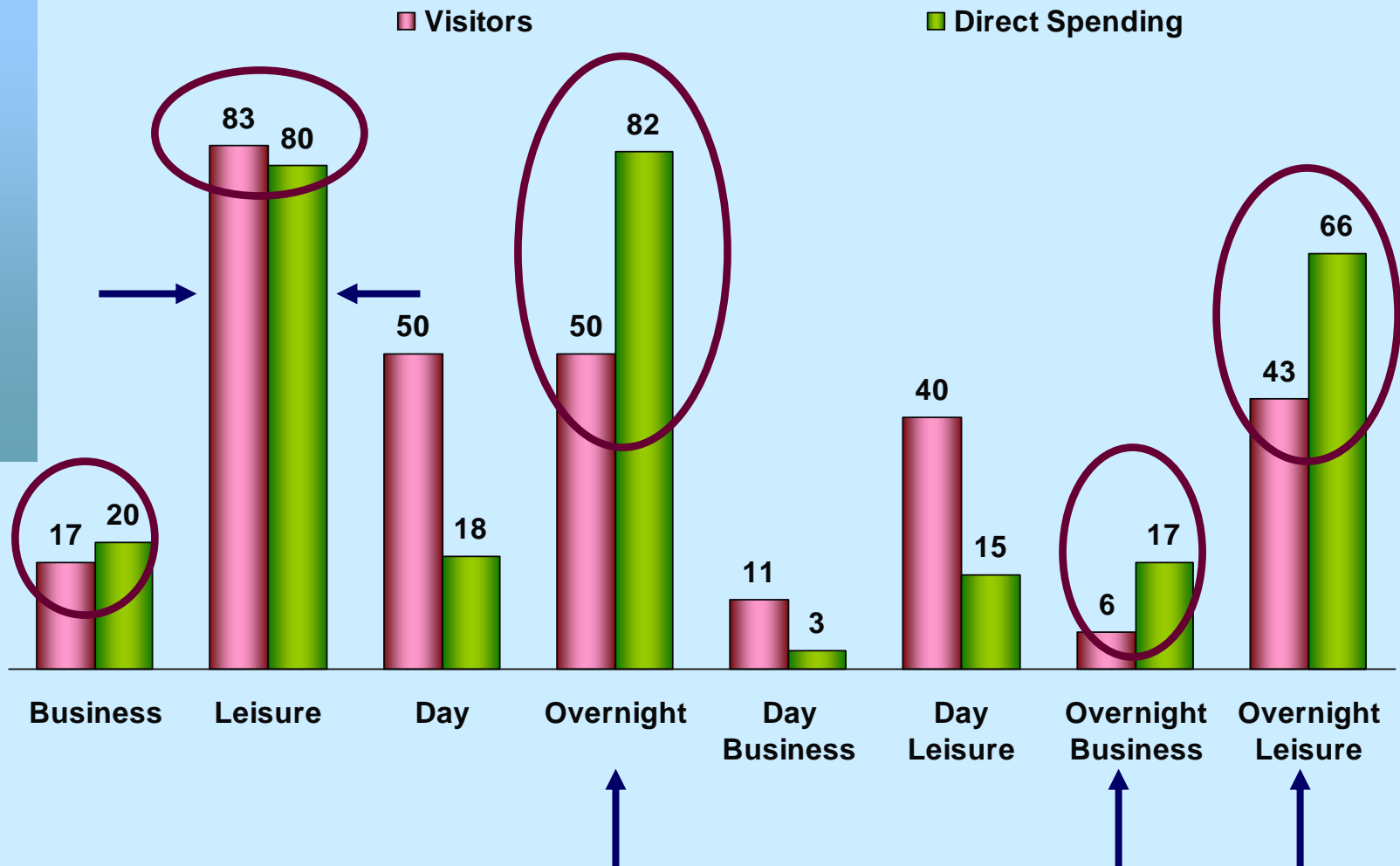
How many visit New Jersey?



How many visit New Jersey?

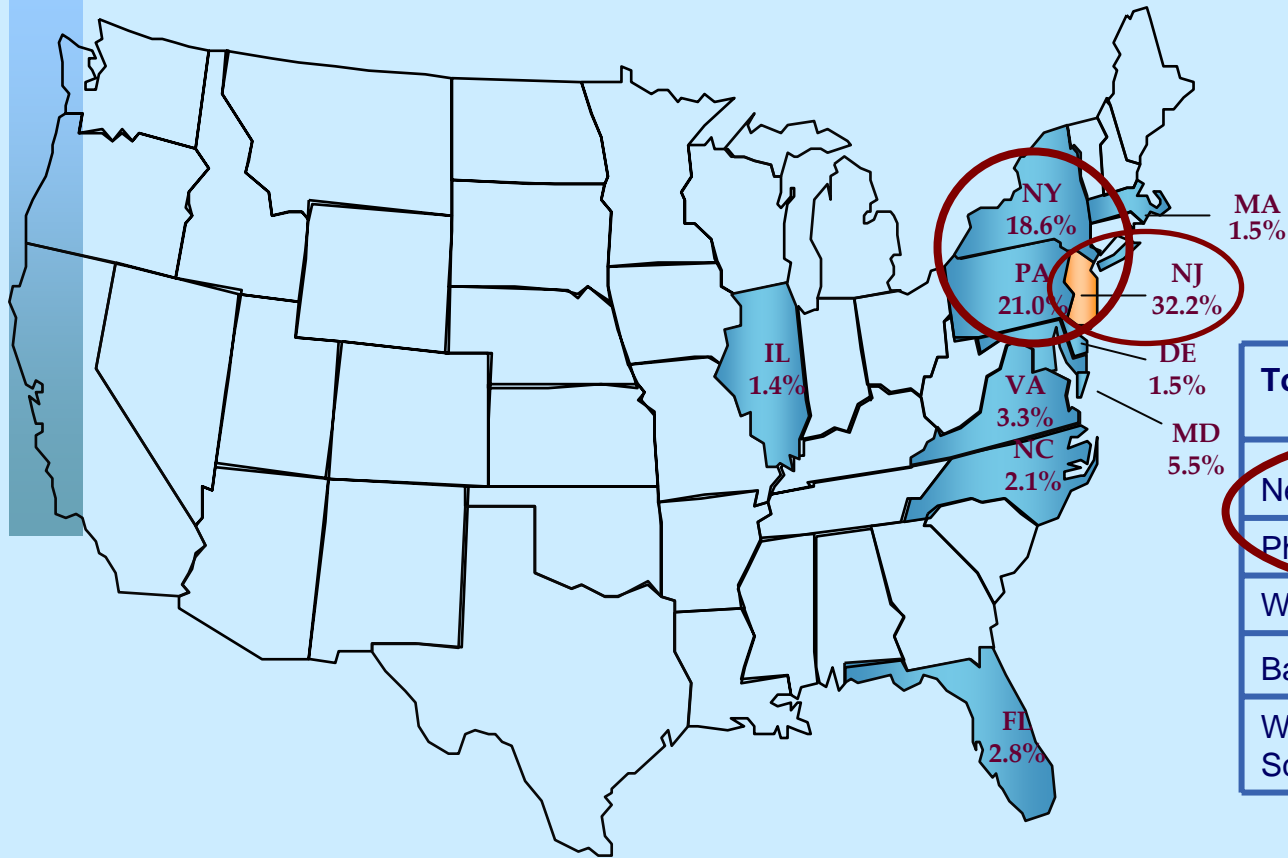


Who spends the most?



FY2007 Share of Total travel

Where do they come from?



Top 5 Origin DMAs (FY2007)	Share of NJ
New York, NY	41.5%
Philadelphia, PA	24.4%
Washington, DC	6.3%
Baltimore, MD	2.5%
Wilkes-Barre/Scranton, PA	2.1%

Where do they go?



Atlantic City

Where do they go?

New Jersey Regions	New Jersey	New Jersey without Atlantic City
Greater Atlantic City	48%	6%
Southern Shore	14%	25%
Gateway	13%	24%
Shore	12%	22%
Skylands	7%	12%
Delaware River	6%	11%



Who are they?

- **Average Age = 47 years**
 - ↪ NJ – AC = 43 years
 - ↪ U.S. = 45
 - ↪ Competitive Set = 44

- **65% have *no* children in their household**
 - ↪ NJ – AC, U.S. and Competitive Set = 58%

- **Average household income = \$88,900**
 - ↪ NJ - AC = \$86,400
 - ↪ U.S. = \$74,600
 - ↪ Competitive Set = \$76,500

Who are they?



DKSA Lifestages

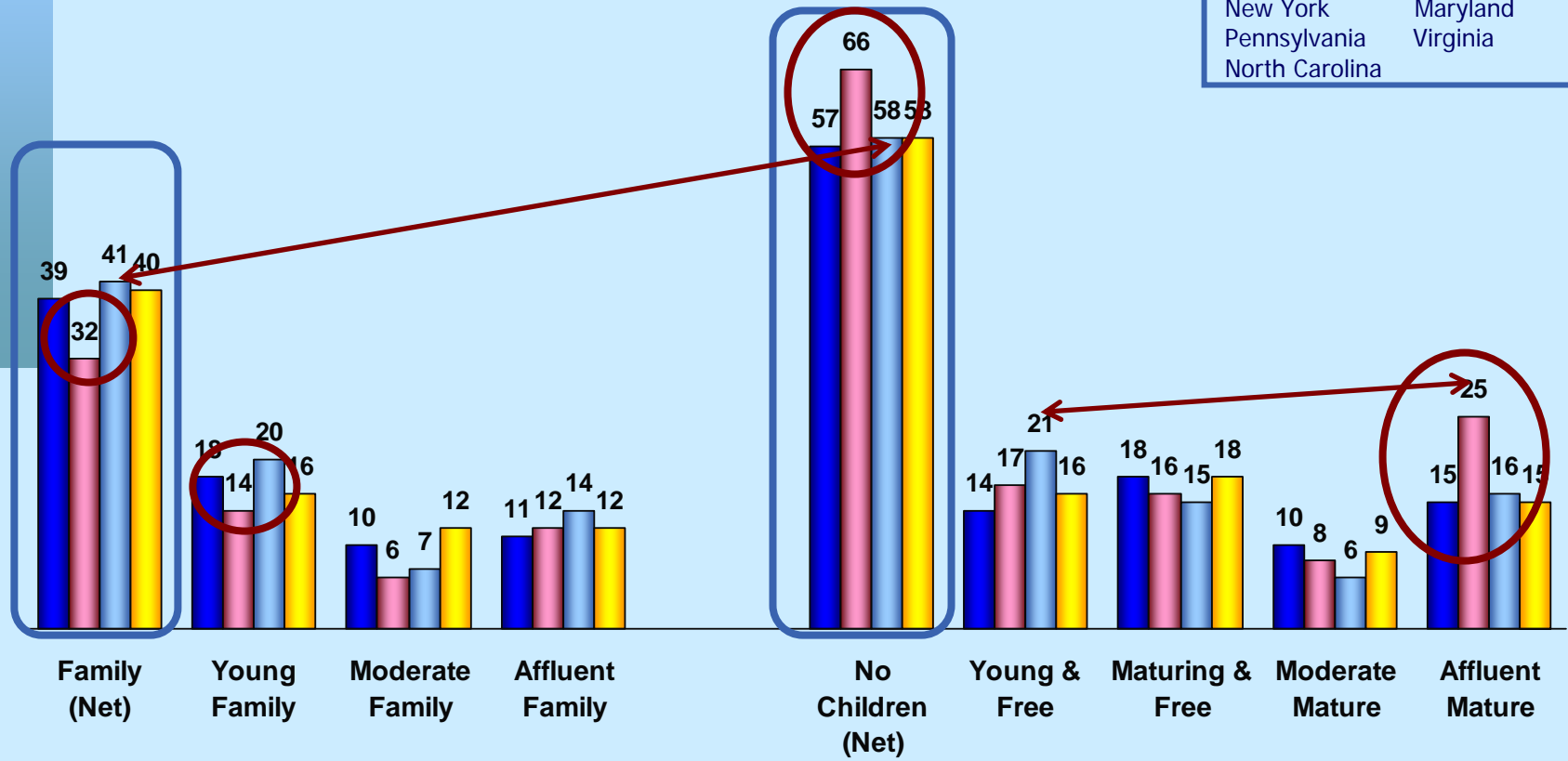
Lifestages	Age of the Household Head	Household Income	Children under Age 18 in Household
Young & Free	18-34 years	any	no
Young Family	18-34 years	any	yes
Maturing & Free	35-54 years	any	no
Moderate Family	35-54 years	Under \$75K	yes
Affluent Family	35-54 years	\$75K or higher	yes
Moderate Mature	55 years or older	Under \$60K	no
Affluent Mature	55 years or older	\$60K or higher	no



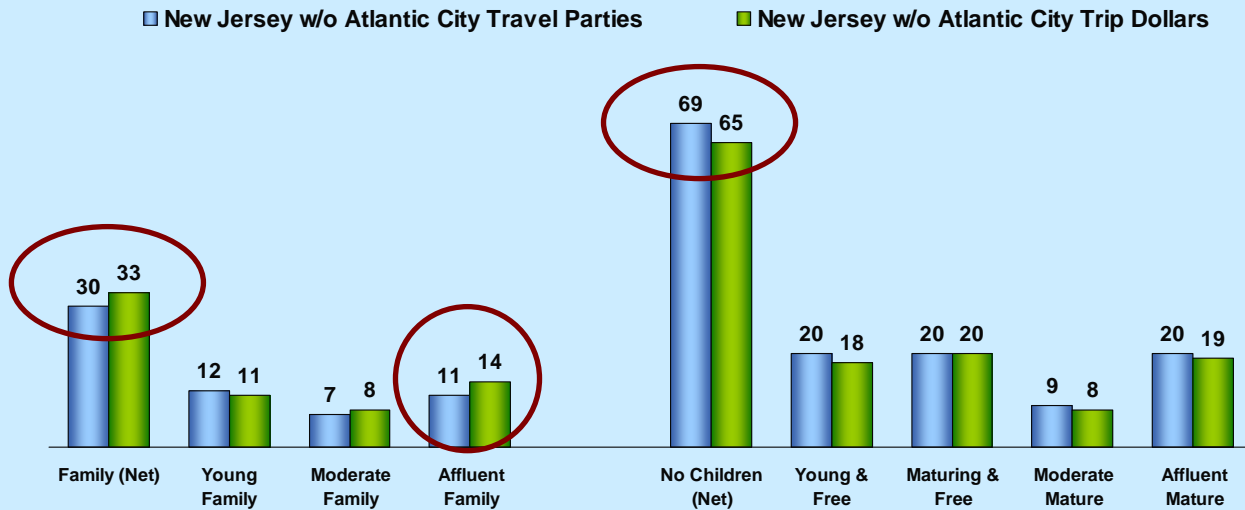
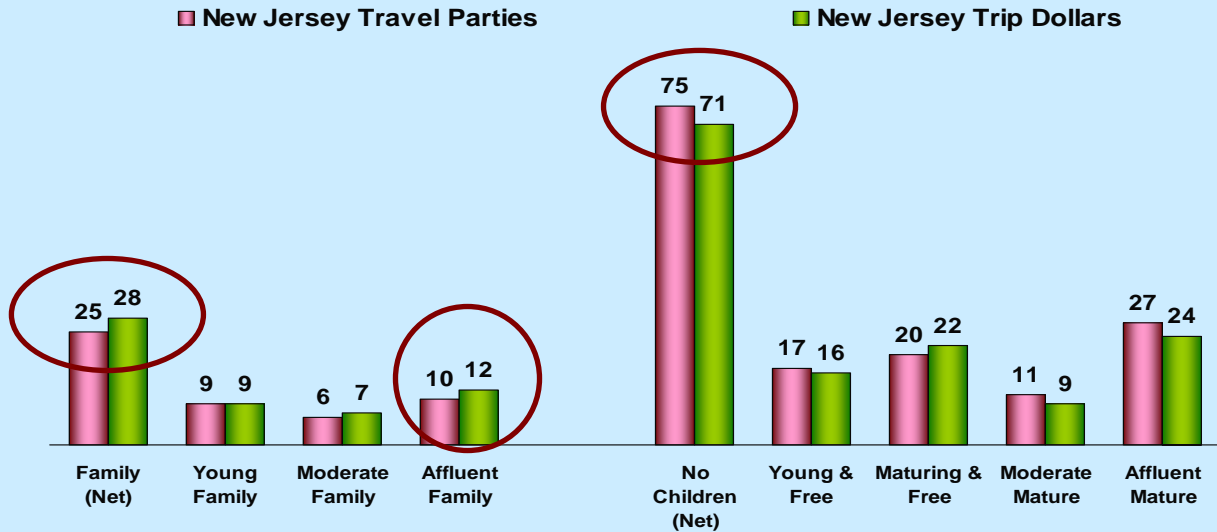
Who are they?

■ U.S.
 ■ New Jersey
 ■ New Jersey w/o Atlantic City
 ■ Competitive Set

New York	Maryland
Pennsylvania	Virginia
North Carolina	



Who are they?



Why do they come?

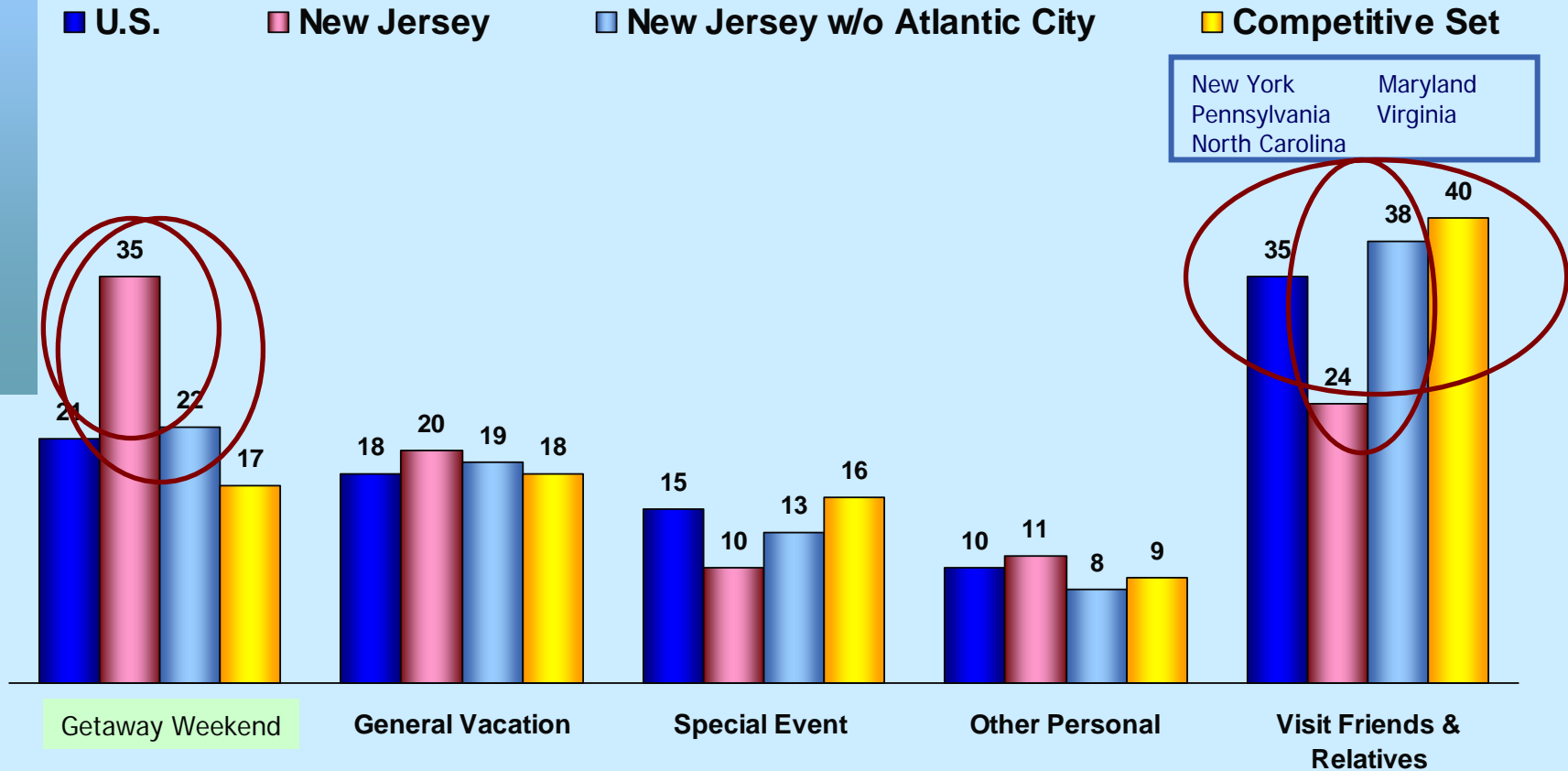


- 3 in 10 for a Getaway Weekend
- 1 in 4 Visit Friends or Relatives

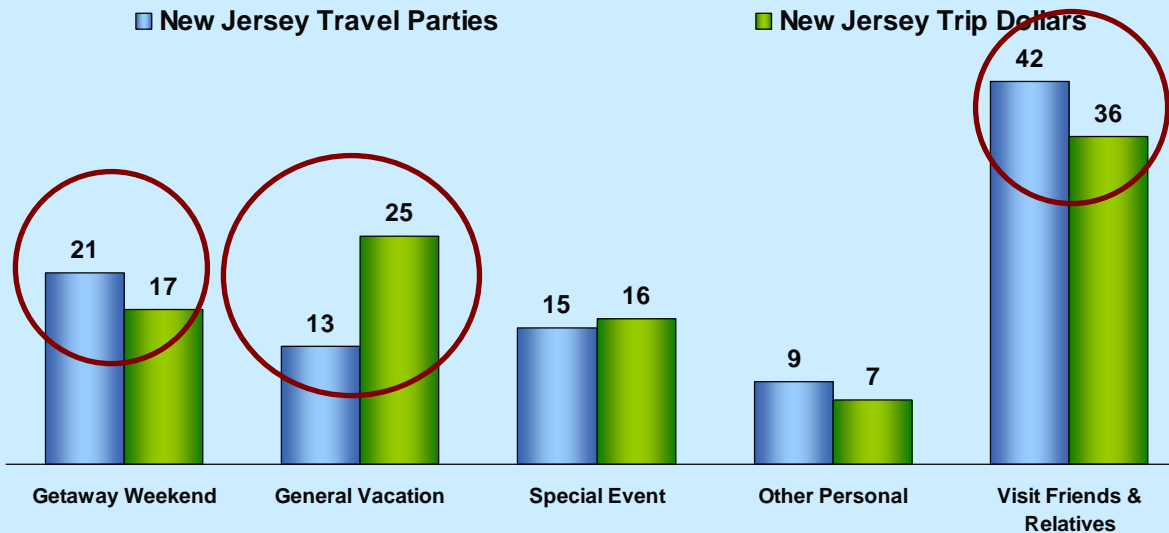
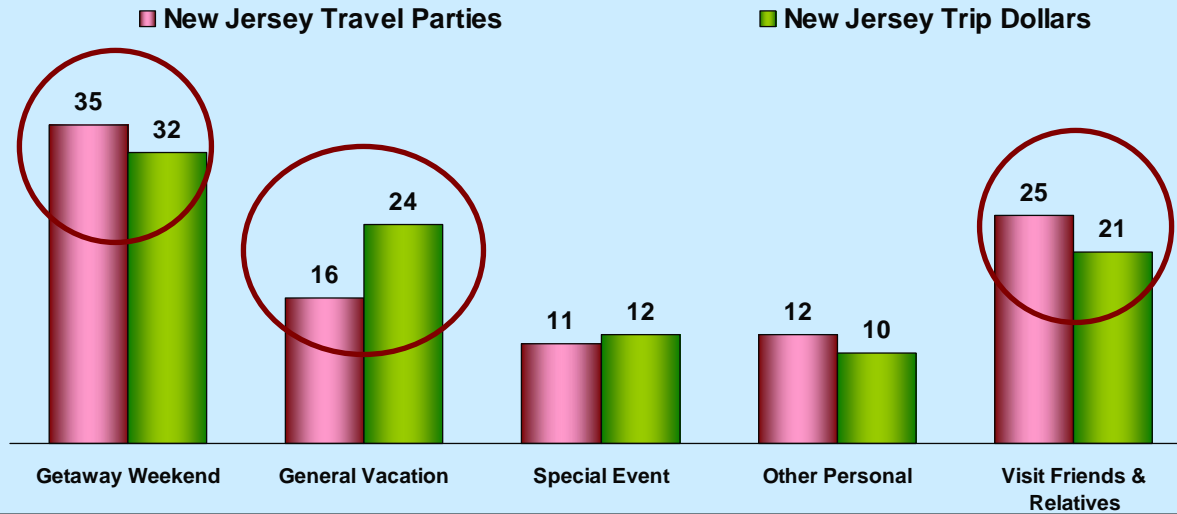
New Jersey excluding Atlantic City

- 4 in 10 Visit Friends or Relatives
- 1 in 5 for a Getaway Weekend

Why do they Come?



Why do they come?



How do they get here?

7%

Average one-way distance traveled

257 miles

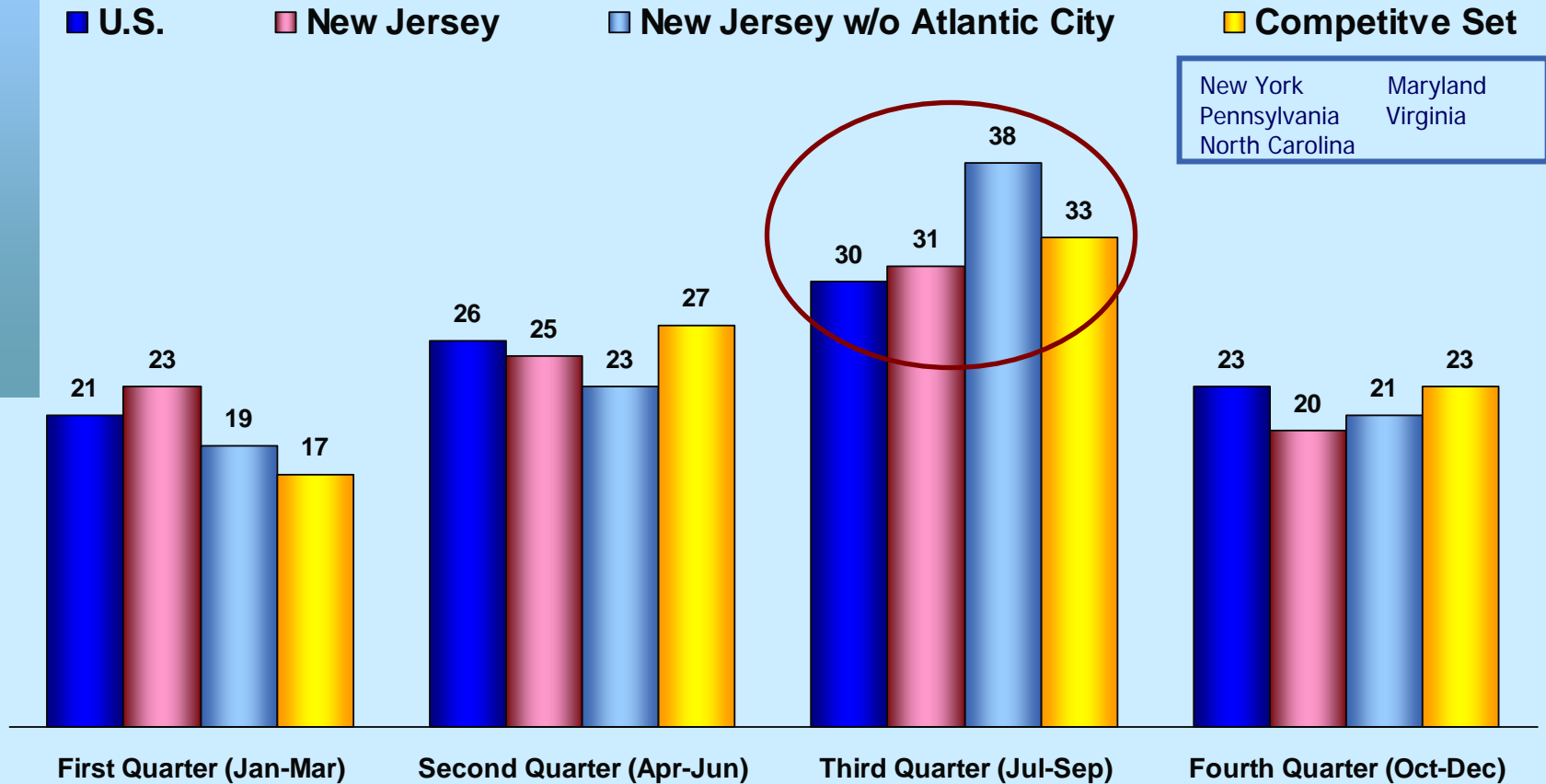
10%

When do they come?

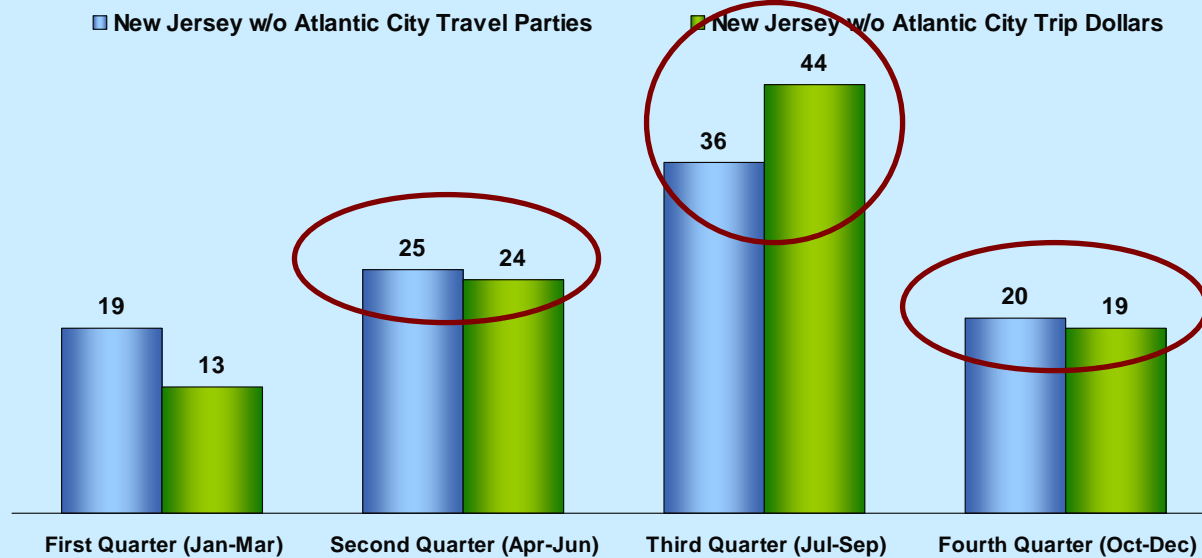
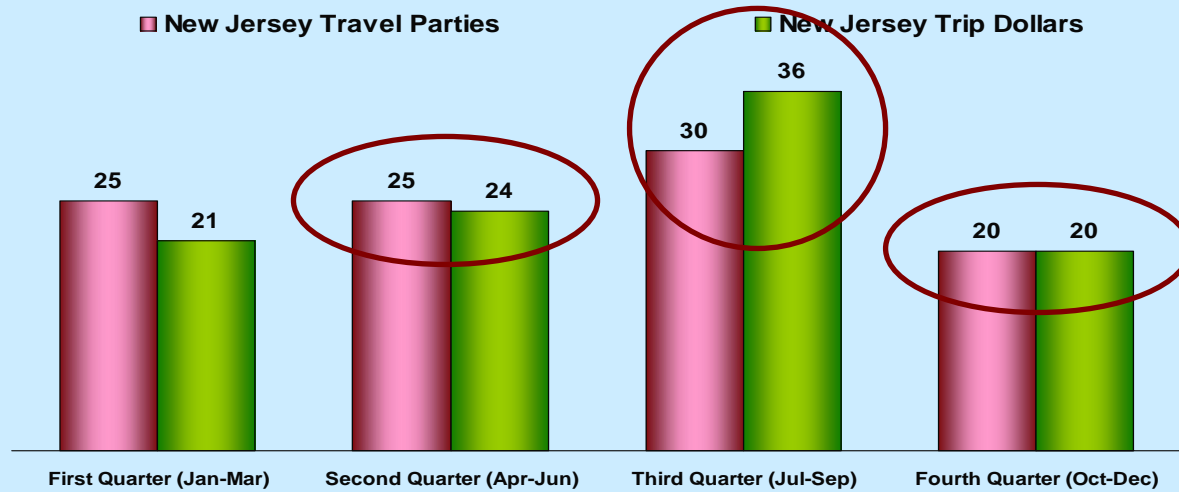


- Third Quarter is the most popular quarter to start travel to New Jersey
- July is the most popular month for travel

When do they Come?



When do they come?



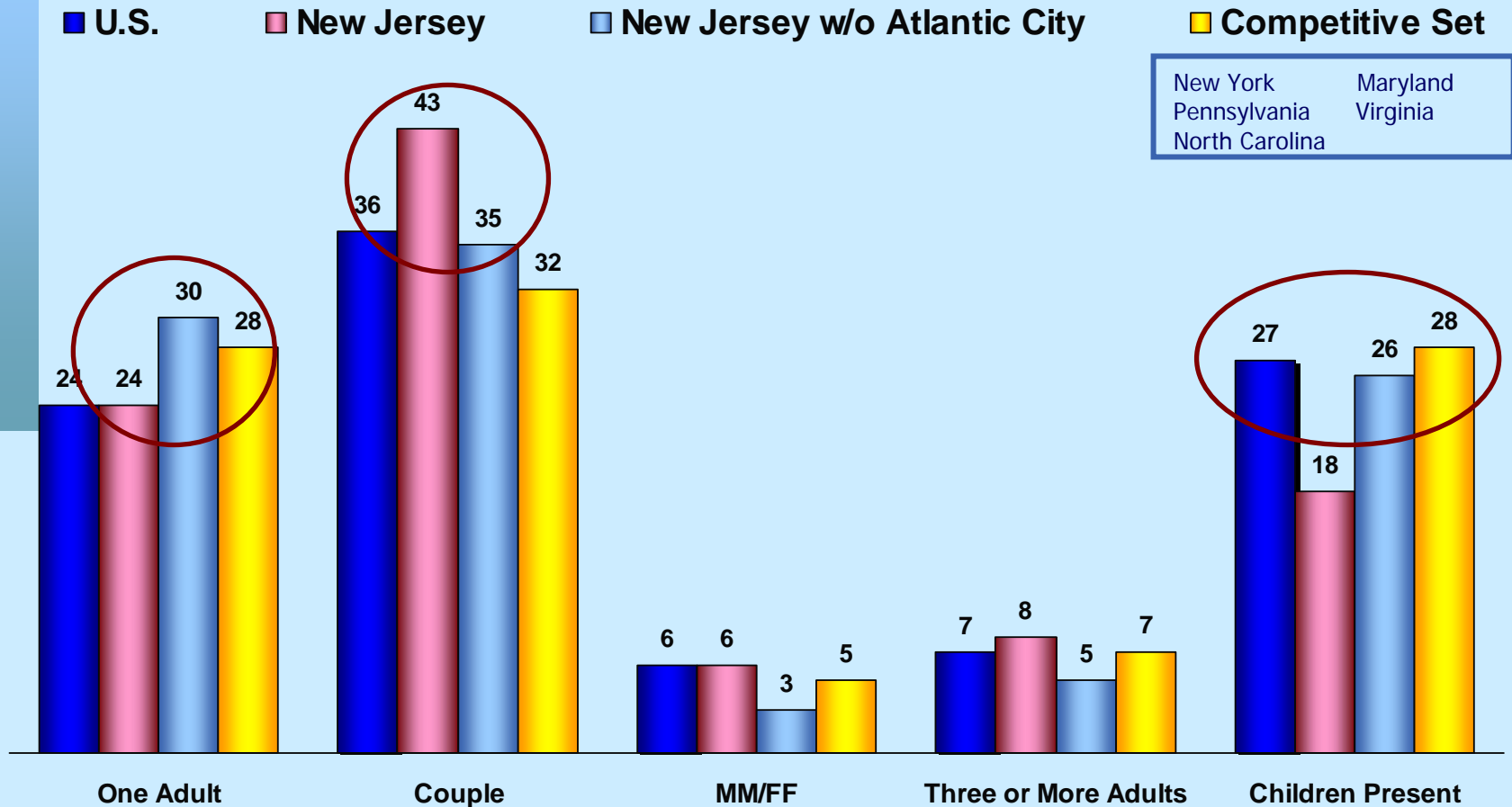
Who do they come with?

- **67% are parties of 2 or less**
 - ↪ NJ-AC = 65%
 - ↪ U.S. and Competitive Set = 60%

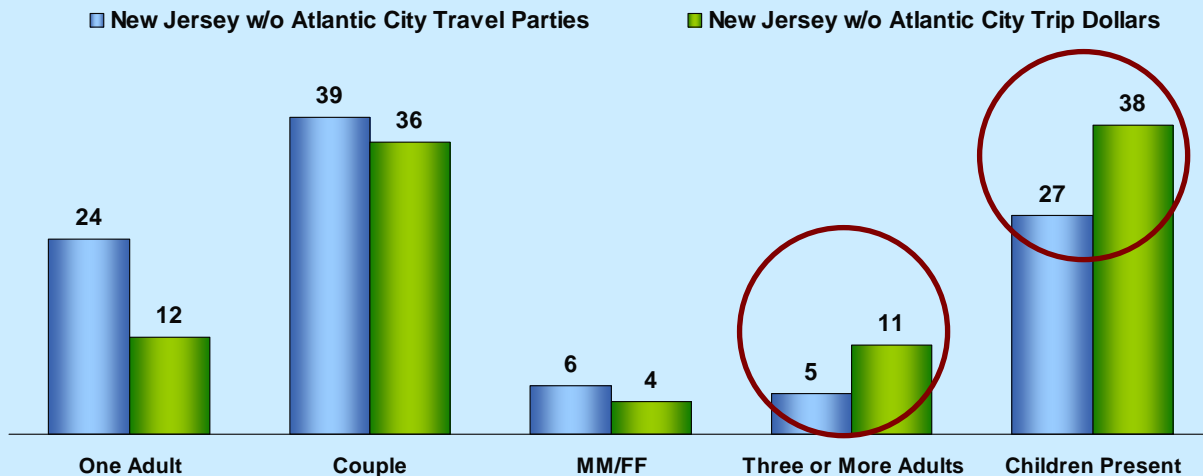
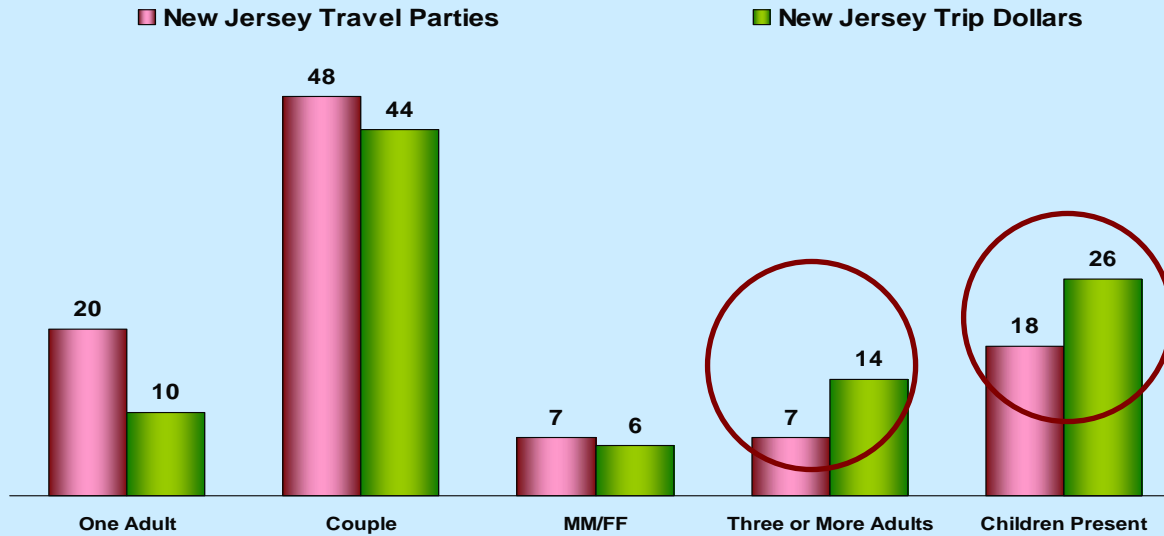
- **18% of travel parties include children**
 - ↪ NJ-AC – 26%
 - ↪ U.S. and Competitive Set – ~ 27%

- **Average Party Size = 2.29 persons**
 - ↪ NJ-AC = 2.32
 - ↪ U.S. = 2.44
 - ↪ Competitive Set = 2.37

Who do they come with?



Who do they come with?



Where do they stay?

➤ **66% stay in paid accommodations**

↪ NJ-AC = 45%

↪ U.S. = 58%

↪ Competitive Set = 53%

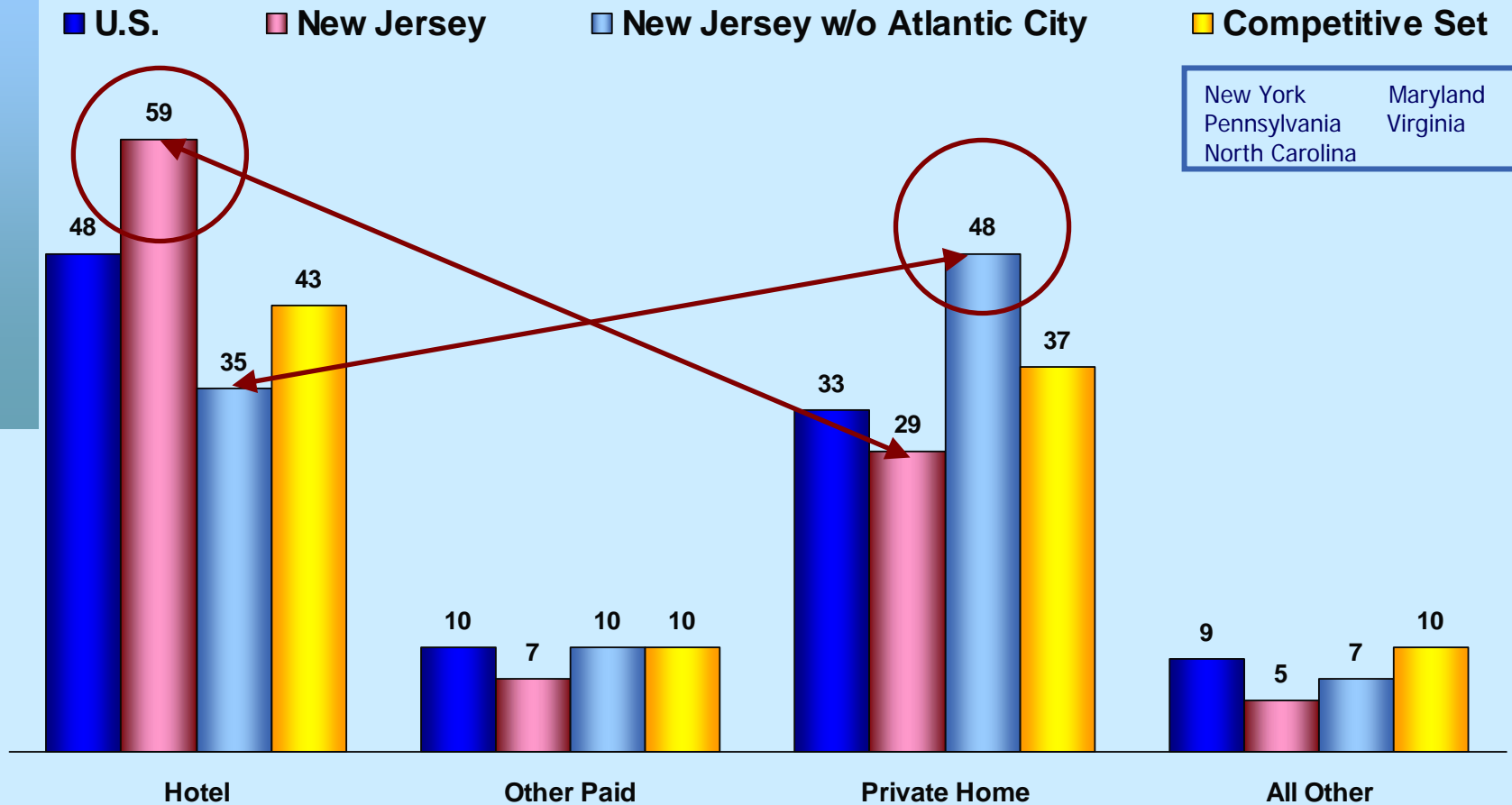
➤ **29% stay in private homes**

↪ NJ-AC = 48%

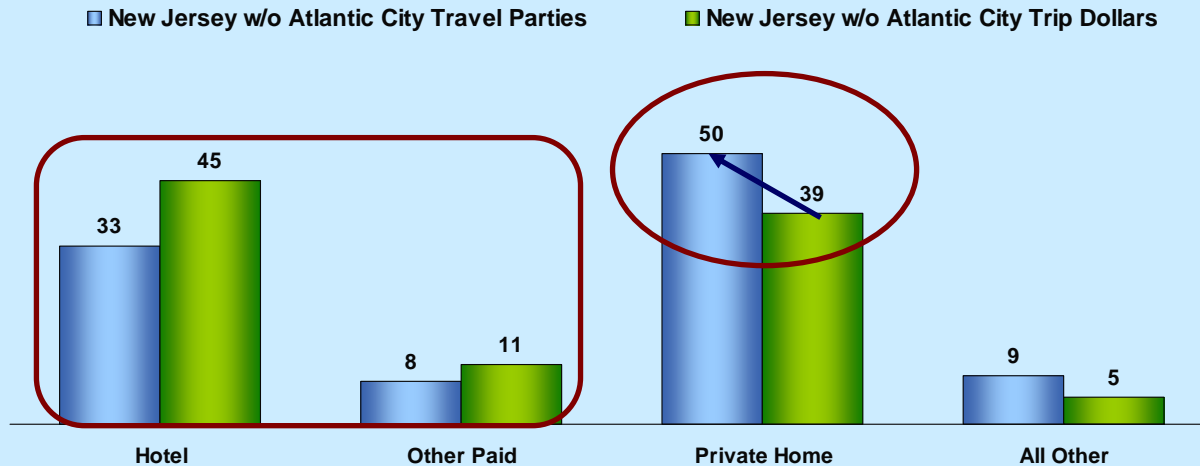
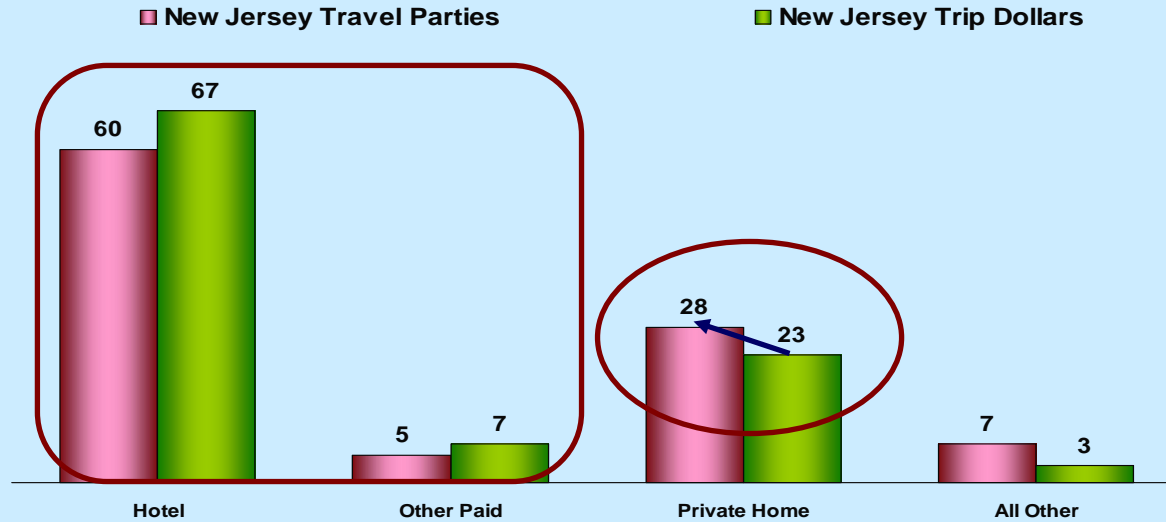
↪ U.S. = 33%

↪ Competitive Set = 37%

Where do they stay?



Where do they stay?

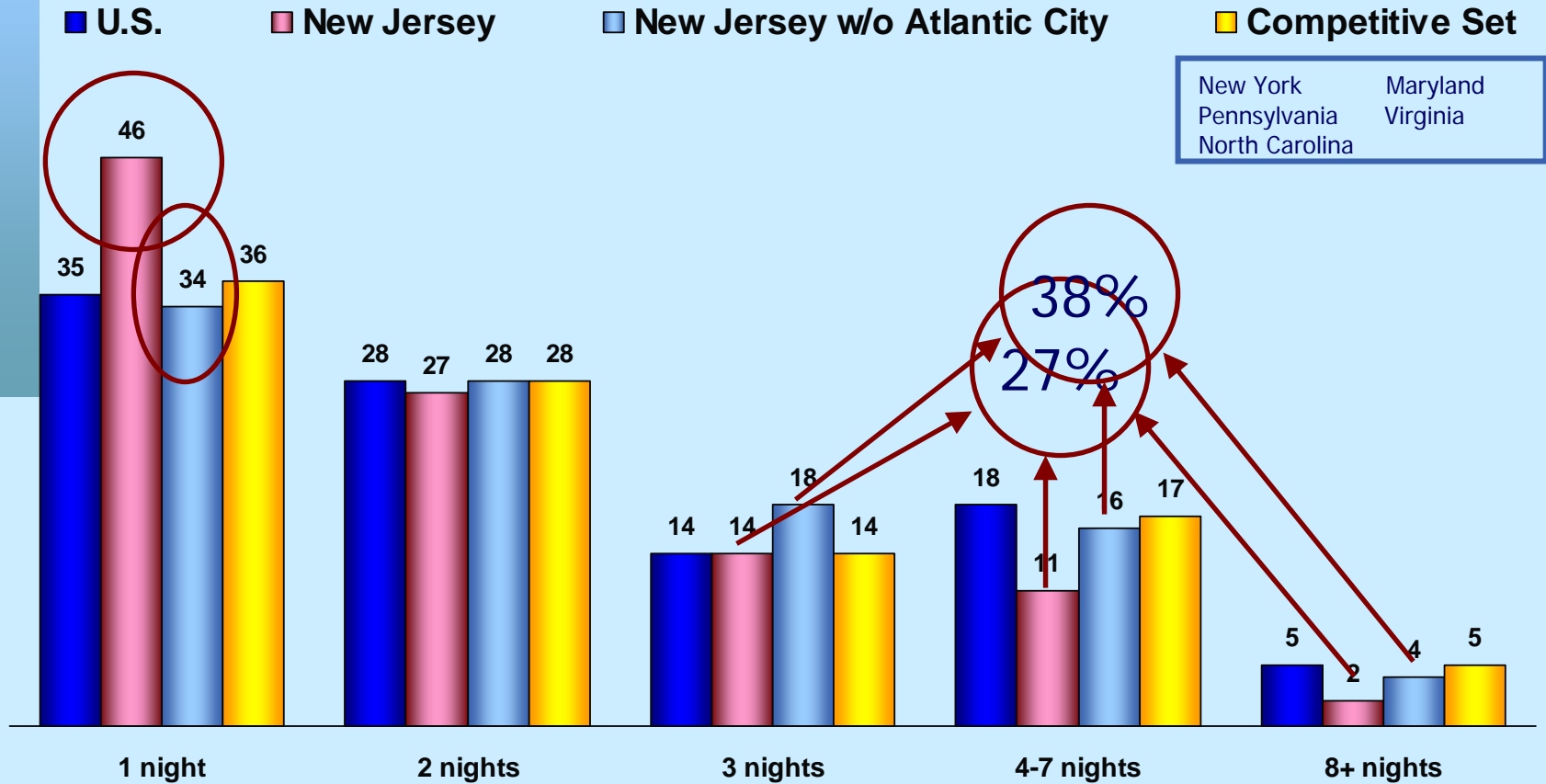


How long do they stay?

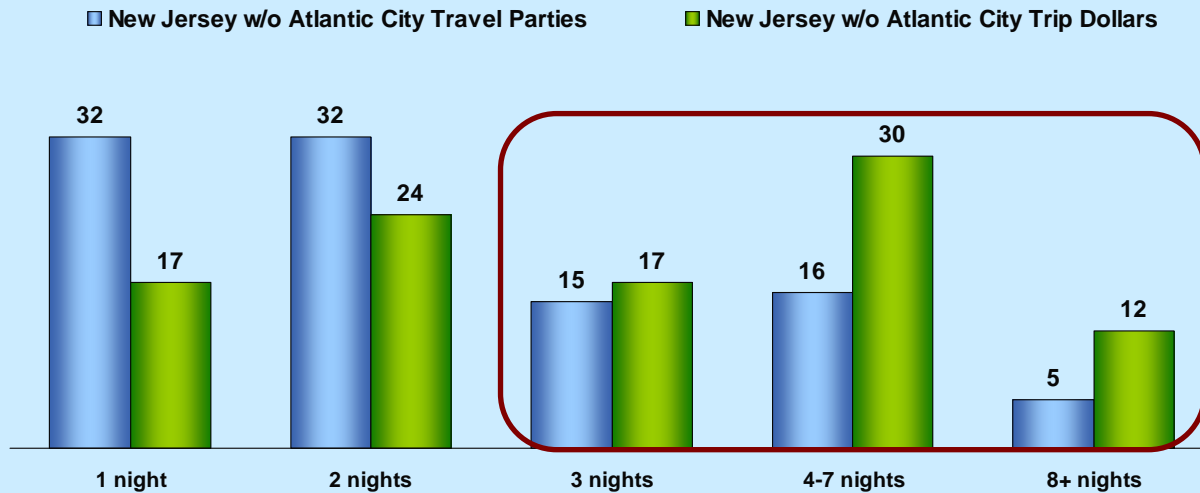
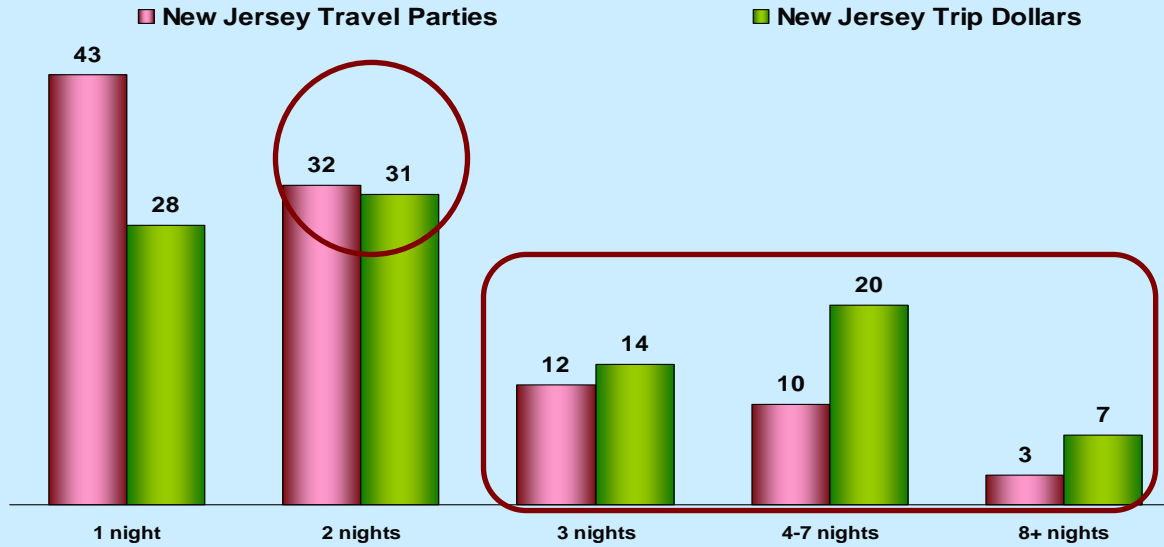


- **73% stay 2 or less nights**
- **13% stay 4 or more nights**
- **Average Length of Stay 2.23 nights**
 - ↪ NJ-AC = 2.68
 - ↪ U.S. = 2.91
 - ↪ Competitive Set = 2.79

How long do they stay?



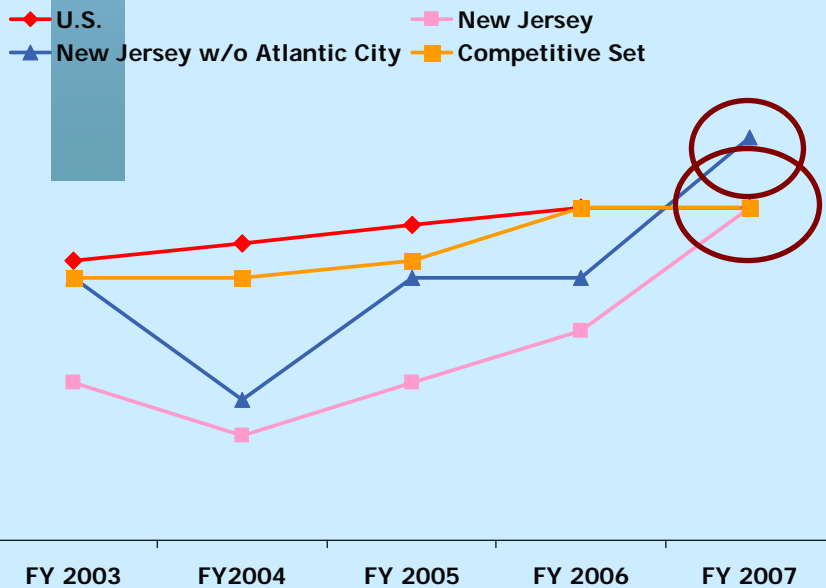
How long do they stay?



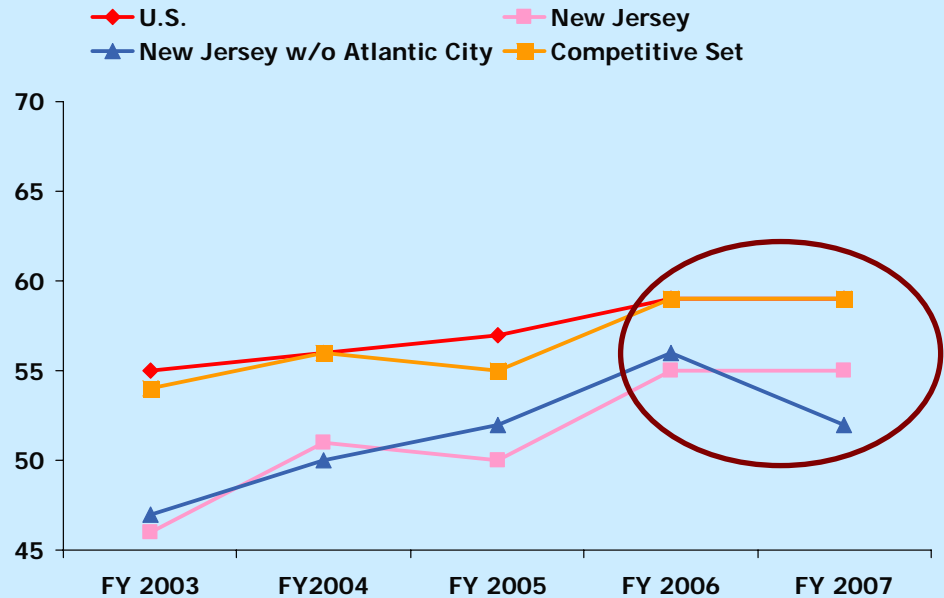
What do they think?

New Jersey Destination Ratings (% Excellent (8-10) Ratings)

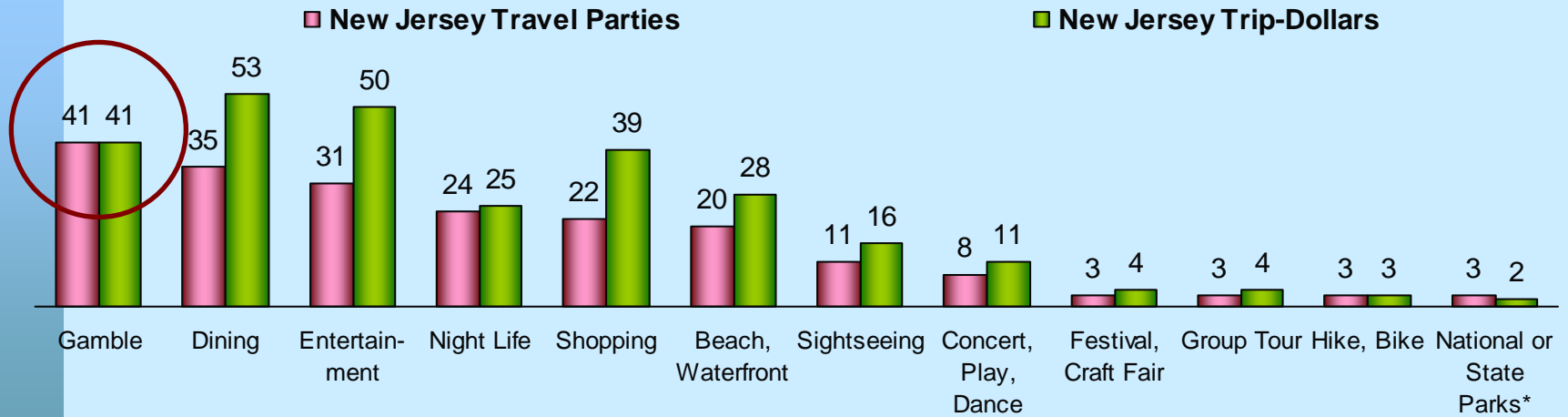
Satisfaction



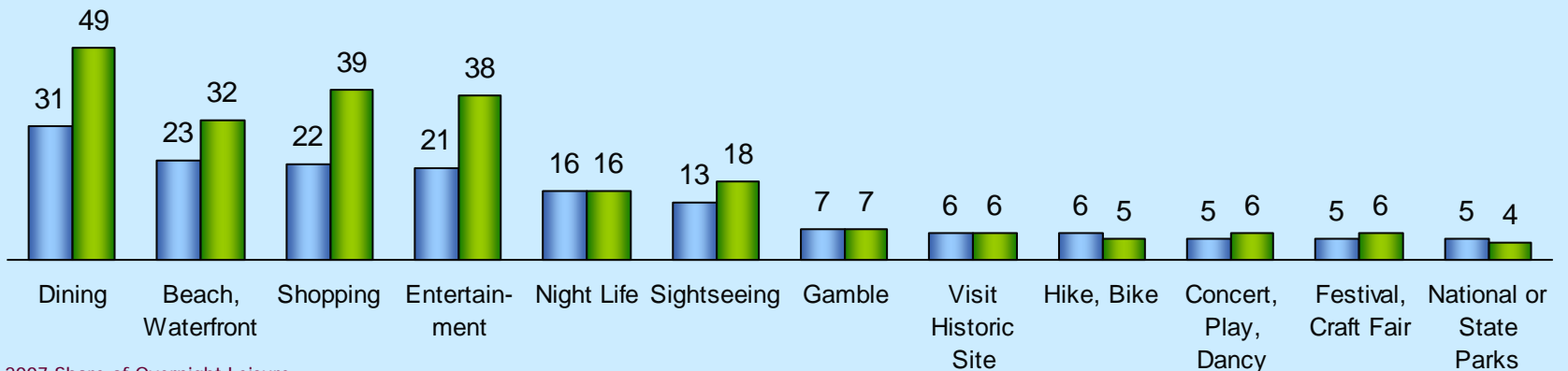
Value



What do they do here?



■ New Jersey w/o Atlantic City Travel Parties **■ New Jersey w/o Atlantic City Trip-Dollars**



How do they spend?

- **Average of \$107 per person/day**

- ↪ NJ-AC = \$95

- ↪ U.S. = \$113

- ↪ Competitive Set = \$101

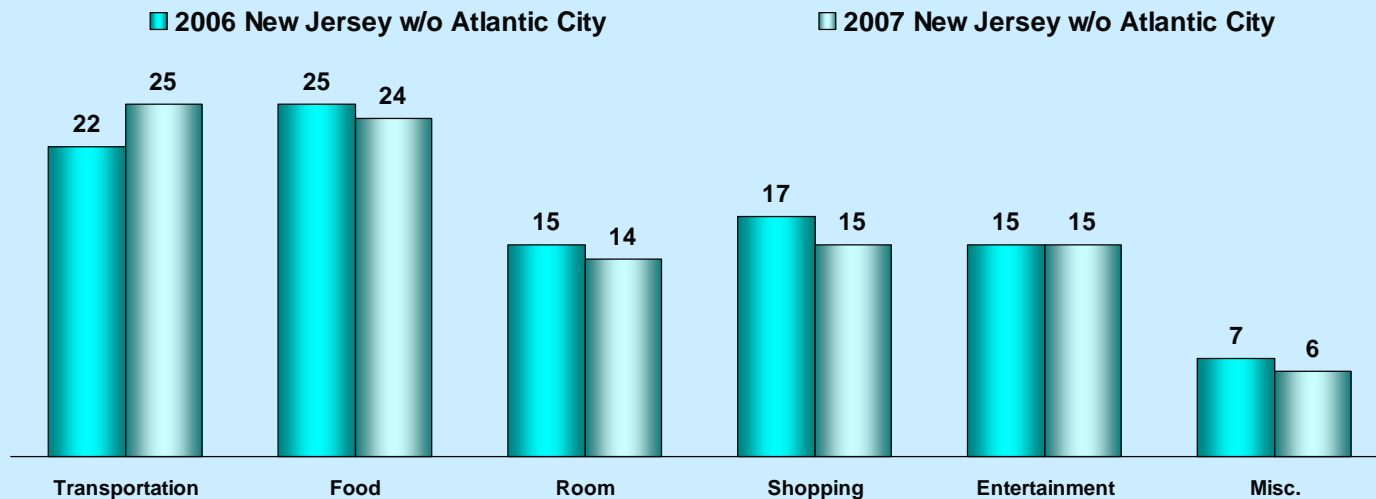
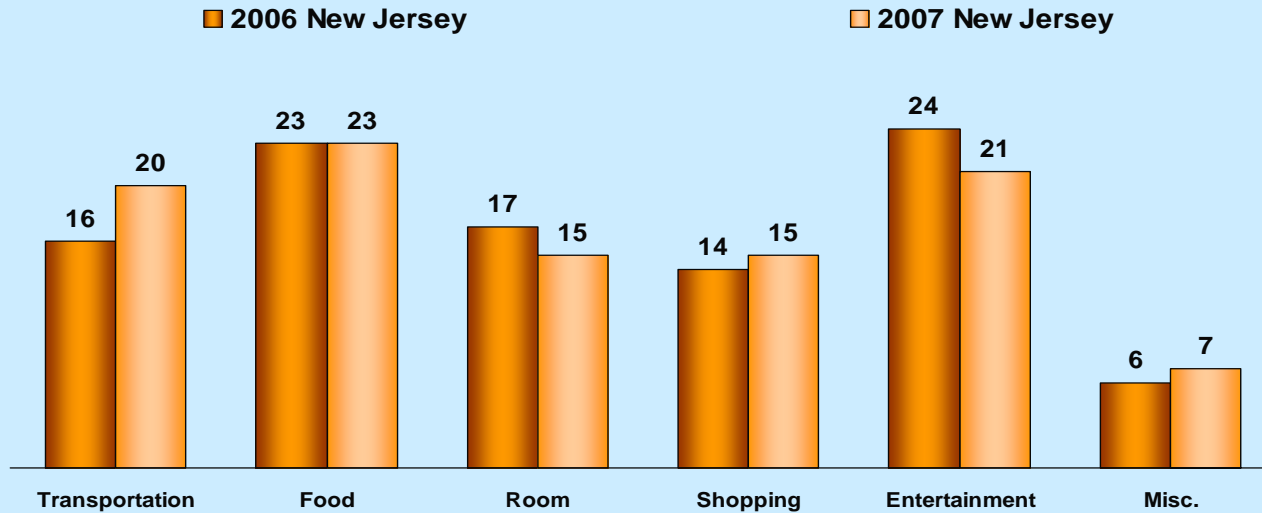
- **20% on transportation**

- ↪ NJ-AC = 25%

- ↪ U.S. = 28%

- ↪ Competitive Set = 28%

Where does the money go?



Summary



- What happens in **Atlantic City** skews data for balance of State
- Valuable **Overnight Leisure** fastest growing segment, but **Per Person Per Day Spending** is declining
- **Family Lifestages** spend the most, but represent a small share of travel parties
- **Activity** participation is low, but value is high
- **Transportation** costs and share of travel dollar continue to rise
- New Jersey a "**Close-to-home**" destination

Questions?



Thank You

Thank You!



D.K. Shifflet & Associates, Ltd.

1750 Old Meadow Rd. Suite 620

McLean, VA 22102

Phone: 703.536.0500

Fax: 703.536.0580

Web: www.dksa.com