2020 NEW JERSEY VISITOR PROFILE

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INSIGHTS
THAT TAKE
YOU
PLACES

DK SHIFFLET

Fiscal Year 2020 Visitor Profile.

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

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March 2021

This New Jersey Overnight Leisure Visitor Profile provides intelligence on US and New Jersey travel trends from Fiscal Year 2020. Information is also provided for five competitive states which draw visitors from the same origin markets as New Jersey. These include New York, Pennsylvania, Maryland, Virginia and North Carolina.

Atlantic City is an iconic destination within the State of New Jersey typically attracting about one-third of all visitors to the State. Although the state should be considered as a whole, Atlantic City's unique offerings suggest there may be value in looking at the State data excluding Atlantic City. Thus, for comparison, data are presented for New Jersey in total (including Atlantic City) and for the State excluding Atlantic City.

In 2020, New Jersey hosted a total…
35.7 Million Overnight visitors, spending…
$12.4 Billion dollars

Volume and profile data are from D.K. Shifflet's **PERFORMANCE**/**Monitor**^{SM} – the largest travel tracking system in the U.S. The 2020 New Jersey Overnight Leisure Visitor Profile is based on a sample of 486 traveling households. Data are based on a fiscal year comprised of fourth quarter 2019 through third quarter 2020. DKSA finalizes, and makes all quarterly data adjustments, after data collection for the fourth quarter of the year. Therefore, fiscal year 2020 data are considered 'preliminary' meaning that it is subject to year end 2020 adjustments. These adjustments are reflected in the subsequent year's Visitor Profile report. Also please note the smaller sample sizes in the 2020 data due to a reduced number of travelers caused by the COVID-19 pandemic.

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Executive Summary

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

Similar to the rest of the country, New Jersey saw a drop in visitation and spending due to the COVID-19 pandemic.

New Jersey Travel (both Total and Overnight Leisure) decreased at a lower rate than the average U.S. destination.

New Jersey Fiscal Year 2019 Highlights:

- As would be expected, Overnight Leisure Visitation to and Spending in New Jersey both displayed large decreases.
- New Jersey remains 5th in market share among its competitors
- Atlantic City is driving up the average age of visitors to New Jersey.
- Gambling is the number 1 activity for New Jersey as a whole, but when excluding Atlantic City, Visiting Friends and Family is the top activity, taking the number 1 spot from Visiting Beaches/Waterfronts.
- Non-Atlantic City portions of the state account for the largest share of visitors but the smallest share of spend.
- New York has increased to be the top origin state for visitors to New Jersey, followed by New Jersey in 2nd and Pennsylvania was in 3rd this year.

STUDY SPECIFICATIONS

Travel definition: A Overnight trip defined as going someplace, staying overnight and then returning home
Sampling Frame: All U.S. domestic Overnight Leisure travelers during Fiscal Year 2020 in New Jersey.
Timeframe: Fiscal Year 2020 (Q4 2019 – Q3 2020)

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Executive Summary

The characteristics of Overnight Leisure visitors to New Jersey vary depending on whether or not Atlantic City is included in the Analysis. Visitors to the Atlantic City region tend to be older, retired, take shorter vacations, stay in hotels, and are less likely to have children in their travel parties. If travel to the rest of the state grows year over year and takes a bigger proportion of total travel share, these characteristics will continue to change.

The average age of New Jersey visitors is 54 years old, same as 2019, one year younger than visitors to the average U.S. destination or to the Competitive Set. Thirty percent of New Jersey visitors have children in their households, more than the average U.S. destination or to the Competitive Set.

The reasons for these demographics are likely due to visitor destination choices. The Atlantic City region still accounts for the largest share of visitation in the State, despite a decrease in its share of visitors to the State (from 37% in 2019 to 31% in 2020) while the Gateway region also saw a large increase in 2020, making it the second most visited region in New Jersey (from 18% in 2019 to 30% in 2020). Delaware River and Skylands regions also displayed increases in 2020.

Visitors to the non-Atlantic City regions tend to take longer trips and travel to visit and stay with friends and relatives. Conversely, visitors to the Greater Atlantic City region tend to take shorter trips and stay in paid accommodations, especially hotels.

Changes in travel can have a large impact on the types of accommodations that are used, the activities engaged in, and ultimately the money spent in the State.

In 2020, New York increased to 1st while New Jersey remained in 2nd and Pennsylvania was the 3rd highest supplier of visitors to the State.

Similar activities are in the top 5 for New Jersey in 2020, with Gambling increasing to the top spot, followed by Beach/Waterfront. Looking at New Jersey excluding Atlantic City, gambling drops to the 27th spot in 2020. Though they may be in a different rank order, Visiting Friends and Relatives, Beach/Waterfront, Shopping, and Culinary/Dining Experience all appear in the top 5 for the entire State and for the Non-Atlantic City regions separately.

Executive Summary

Average Destination Satisfaction and Value ratings for the State remain high (8.07 and 8.12 respectively on a 10-point scale) despite both seeing decreases from 2019 (Satisfaction: from 8.55 to 8.07, Value: from 8.28 to 8.12). For both dimensions, the non-Atlantic City portion of the State saw similar decreases from 2019, but both Satisfaction (7.97) and Value (7.98) are lower compared to the whole State. Average Hotel Satisfaction rating has risen to 8.8 from 2019 (8.5). Many variables can impact perceived satisfaction and value including changes in pricing or changes in the perceived quality or availability of the product. Overall, visitors seem to be quite satisfied with their New Jersey experience.

In summary, despite significant decreases, due to the COVID-19 pandemic in 2020, visitation to New Jersey is slightly higher than visitation to the average U.S. destination. This could put New Jersey in a good place to continue welcoming visitors as vaccines are administered and travel picks up again in the coming months, just in time for Summer.

Executive Summary

The following report summary pages highlight key segments which dominate the mass market in New Jersey Overnight Leisure travel and are customers with high share in visitation that deserve attention.

Focus on your Customers:

- Despite large decreases in visitation, the percentage decrease in New Jersey is lower than the decrease among the average U.S. destination.
- New Jersey remained fifth in market share among its competitors
- Majority are mature travelers, working in technical/sales/administrative occupation, belonging to the Affluent Mature lifestage
- Majority stay at paid hotels (Economy and Mid-Level Hotels), travel for the purpose of Visiting Friends/Relatives and Getaway Weekends and participate in a variety of Family, Attraction and Nature-based activities
- New Jersey Overnight Leisure travelers (excluding Atlantic City) stay slightly shorter than travelers to the US average destination or its competitors due to a high level of weekend getaways.
- New York, New Jersey, and Pennsylvania are primary Origin States for travel
- Largest share of Overnight Leisure visitors arrive from New York and Philadelphia DMAs (average one-way travel distance of 227 miles)
- New Jersey received lower average destination ratings but higher average hotel ratings without Atlantic City
- Majority plan trips to New Jersey between 2 weeks and 3 months

Executive Summary

While understanding the Overnight Leisure travel market in terms of who is visiting the State, why, and what they do is imperative in painting a picture of travel to New Jersey, it is also important to focus on the opportunities that lie ahead for New Jersey travel. Many segments have the potential to offer not necessarily a high travel party share but are characterized by a higher trip-dollar spending share which makes these segments particularly valuable to target.

Focus on your Opportunity:

- Travelers 55+ years, Affluent Family and Affluent Mature Lifestage
- Travelers staying in Hotels/Motels and Paid Non-Hotels
- Travelers staying 3+ night stays
- Visitors traveling in travel parties of 3+ adults or with children
- Visitors traveling for General Vacations
- Summer travelers
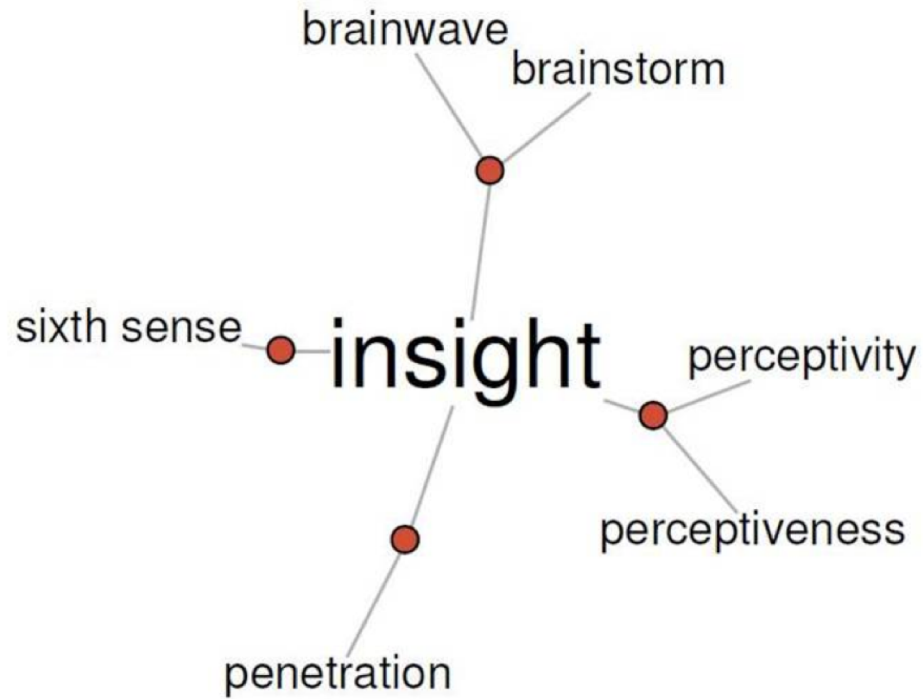
Travel Year Review
New Jersey 2020 Overnight Leisure Visitor Profile

Visitor Volume and Spending

New Jersey hosted about 36 million overnight leisure visitors, spending 12.4 billion dollars in 2020 – more than one quarter less than 2019. Volume fell at a slightly lower rate (-28%) than the average U.S. destination (-29%) over 2019.

Overnight Leisure travelers make up about 42.4% of all New Jersey's travelers – a share that's fairly consistent over the past years. In terms of their spending, overnight leisure travelers contribute 71.4% to New Jersey's Total Spending.

Visitor Volume

PERSON-STAYS (millions) INDEXED TO 2016
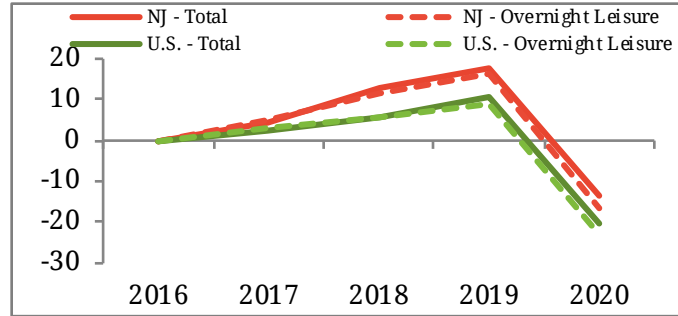
84.2 Million Visitors — 26% ↓

35.7 Overnight Leisure — 28% ↓

Visitor Spending

DIRECT SPENDING (billions) INDEXED TO 2016
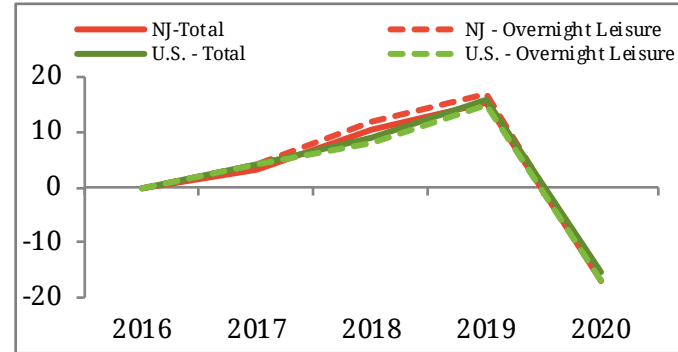
$17.4 Billion Dollars — 28% ↓

$12.4 Overnight Leisure — 29% ↓

GLOSSARY

Note: Data in these graphs indexed to 2016 – data shows yearly change as compared to 2016 rather than year over year percent change – this depicts a more accurate relationship between the segments

Note: Fiscal Year volume and spending figures subject to change due to year-end 2020 quarterly adjustments

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Visitation to, and spending in, Atlantic City has always had a substantial impact on the overall statistics for New Jersey, but this may be changing.

In past years, the non-Atlantic City portion of the State has driven growth in total visitation, while Atlantic City has driven growth in Overnight Leisure. In 2020, however, the non-Atlantic City portion of New Jersey saw less decline in Total visitation and in Overnight Leisure visitation.

For spending, this trend is different. Both segments of Overnight Leisure travelers decreased similarly in spending.

Visitor Spending
SPENDING (% change) INDEXED TO 2016
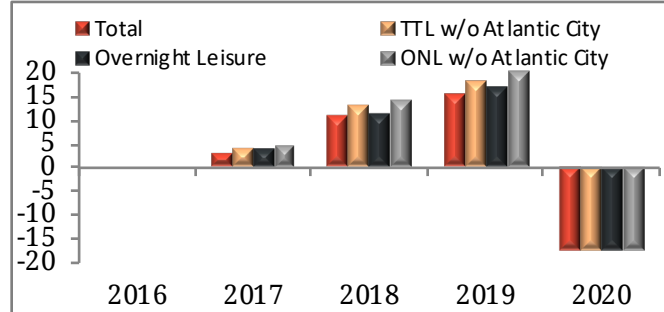
New Jersey without Atlantic City is spending less per-person-per day than those visiting Atlantic City, but since these folks have traditionally represented about two-thirds of all visitors to New Jersey, the impact of their travel party is significant.

Visitor Volume
PERSON-STAYS (% change) INDEXED TO 2016

Non-Atlantic City destinations displaying smaller decreases in Overnight Leisure visitors

Overall, the impact of New Jersey's overnight visitation on the share of the US travel market decreased slightly from 2019. Among all its competitors, New Jersey's Overnight Leisure traveler segment captured the fifth largest share of the US travel market in all four travel metrics – Stays, Person-Stays, Person-Days, and Trip-Dollars. North Carolina saw an increase in market share in 2020, while the rest decreased.

New Jersey's Overnight Leisure travel parties (or Stays) represent 1.93% of the US Overnight Leisure travel market. People often travel together with family, friends or with other groups. Thus, the Stays metric considers how

many distinct groups of travelers came to the destination.

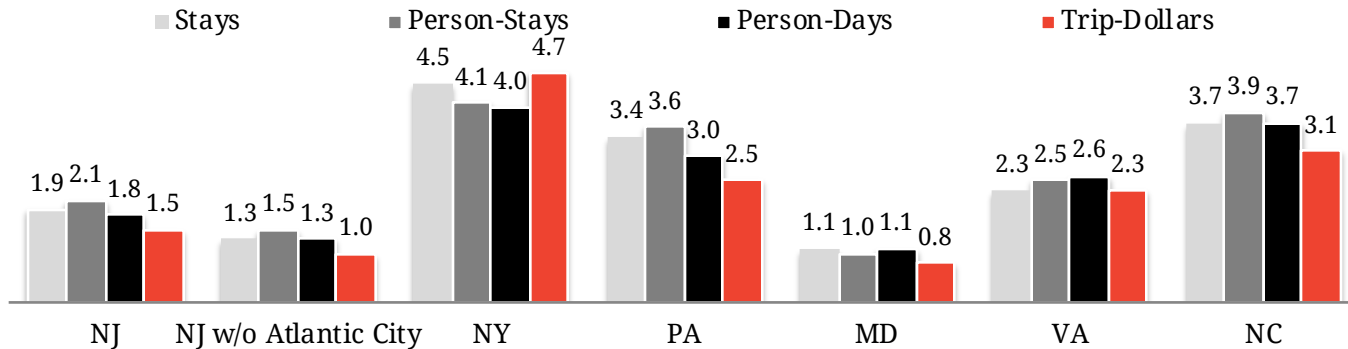In contrast, the number of Person-Stays taken to a destination indicates how many people came to your destination, but not how long they stayed. New Jersey's Overnight Leisure travelers (or Person-Stays), the main focus of this report, represent 2.11% of the US Overnight Leisure travel market.

Market Share of U.S. Travel
OVERNIGHT LEISURE 2020 (%)

Legend: Stays | Person-Stays | Person-Days | Trip-Dollars

Destination	Stays	Person-Stays	Person-Days	Trip-Dollars
NJ	1.9	2.1	1.8	1.5
NJ w/o Atlantic City	1.3	1.5	1.3	1.0
NY	4.5	4.1	4.0	4.7
PA	3.4	3.6	3.0	2.5
MD	1.1	1.0	1.1	0.8
VA	2.3	2.5	2.6	2.3
NC	3.7	3.9	3.7	3.1

New Jersey decreased slightly in the Overnight Leisure segment in all four metrics

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The Person-Days metric is simply the total number of days that visitors contributed to New Jersey. New Jersey's Overnight Leisure travelers represent 1.81% of the US Overnight market share. New Jersey Overnight Leisure travelers contributed the smallest of all four metrics in Trip-Dollars to the US Overnight Leisure market; 1.5% in terms of monetary worth of travelers as opposed to the contribution of number of trips or number of days spent in a destination.

Changes in Direct Spending can not only be influenced by ALL other travel measures including number of travel parties, number of persons, number of days, number of people in the Stays, length of stay, and individual traveler spending but also be related to changes in travel party composition, purpose of trip, activity participation levels, or accommodation choice.

Competitive Market Share

OVERNIGHT LEISURE PERSON-STAYS (%)
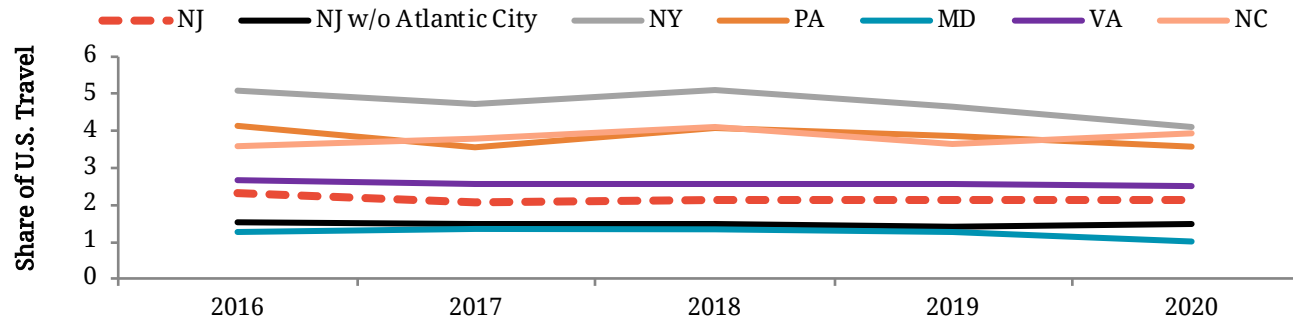
Atlantic City contributes about 1/3rd of New Jersey's market shares in all four metrics

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Demographics

Who are New Jersey's Overnight Leisure visitors?

New Jersey's visitors can be described in three ways; basic demographics, lifestages and by generation. With the exception of household income, the demographic make-up of travelers to New Jersey has been somewhat the same over the last time periods.

In 2020, the average age and generational composition of visitors to the State are shaped by Atlantic City's mature visitors, displaying an increase in average age, increasing in percentage of Gen Xers and decreasing in percentage of Millennials.

Average incomes of New Jersey visitors increased in 2020 and are still consistently higher than visitors to the average U.S. destination.

How do New Jersey's Overnight Leisure visitors compare?

	New Jersey	New Jersey w/o Atlantic City	Average U.S. Destination	Competitive Set (NY/PA/MD/VA/NC)
Average Age (years)	54	52	55	55
Employed	74%	79%	53%	54%
Retired	23%	18%	36%	37%
Average Income (000)	$120.5	$121.8	$110.2	$113.9
Children in HH	30%	37%	23%	18%
Children in Travel Party	17%	23%	11%	9%
Generations:				
Millennial (1981-1996)	20%	22%	20%	20%
GenX (1965-1980)	35%	39%	23%	18%
Boomer (1946-1964)	40%	35%	48%	50%
Silent/GI (1945 back)	5%	3%	7%	8%

New Jersey Visitors...

More Gen X
More Employed
Higher HH income

than the US

Demographics

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

Visitors are more likely to belong to Lifestages with no children in the household for New Jersey, with and without Atlantic City included. It is important to notice, however, that where the share of Stay-Dollars is less than the share of Stays these Lifestages are less valuable for the State. The Affluent Mature Lifestage is the most profitable segment for both the State and the State excluding Atlantic City, just beating out the Affluent Family Lifestage.
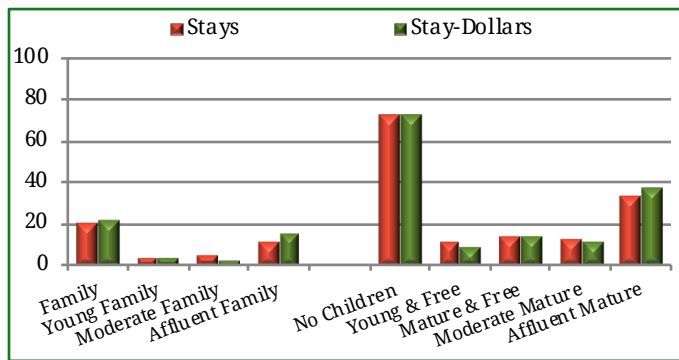
DK Shifflet Lifestage Definitions

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

New Jersey

OVERNIGHT LEISURE (%) (2018-2020)

New Jersey without Atlantic City

OVERNIGHT LEISURE (%) (2018-2020)
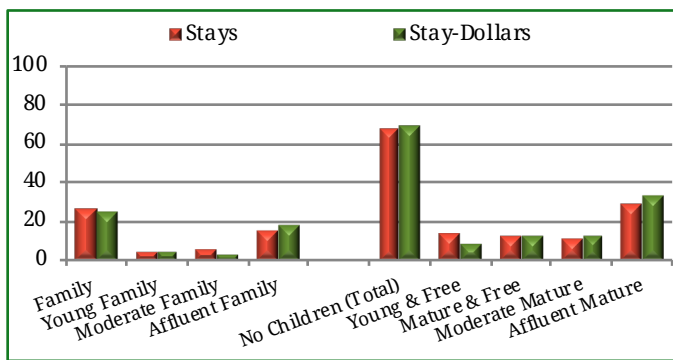
Affluent Mature:

Most profitable

Where do New Jersey's visitors come from?

Almost 8 out of 10 New Jersey visitors come from 5 states with 22% coming from New Jersey itself and an additional 54% coming from the neighboring states of New York and Pennsylvania.

It is not surprising then that the majority of travel to New Jersey is by car and those travel an average one-way distance of 227 miles – the lowest among the average U.S. destination and New Jersey's competitors. Two-thirds of travelers live in a vicinity of less than 100 miles.

New Jersey Origin States

OVERNIGHT LEISURE PERSON-STAYS (%) (2020)

New York	36.1%
New Jersey	21.9%
Pennsylvania	18.0%
Maryland	4.5%
Florida	2.2%
California	2.0%
Virginia	1.6%
Other	13.7%

New Jersey Destination Regions

OVERNIGHT LEISURE PERSON-STAYS (%) (2020)

Greater Atlantic City	30.9% ▼
Gateway	30.4% ▲
Southern Shore	10.7% ▼
Delaware River	10.7% ▲
Skylands	10.5% ▲
Shore	6.9% ▼
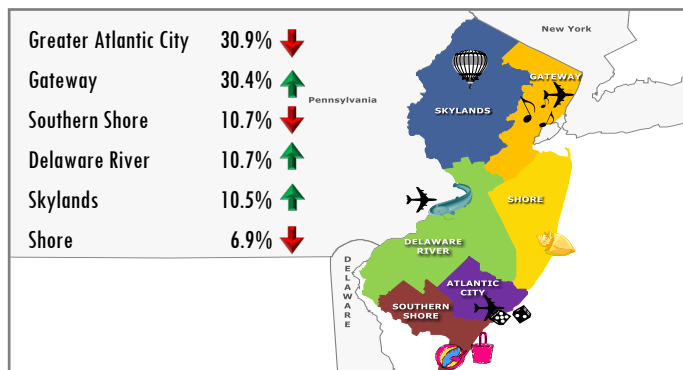
Where do New Jersey's visitors go?

The Greater Atlantic City Region saw one of the few increases in 2019 continuing to receive the largest share of New Jersey's Overnight Leisure visitors.

The Delaware River also experienced an increase in visitation in 2019, while the remaining regions saw decreases in visitation.

76% of New Jersey visitors come from the tri-state area

Why do travelers visit New Jersey?

Getaway Weekends and visiting Friends or Relatives each account for over one-third of Overnight Leisure visitors to New Jersey in 2020. However, if Atlantic City is excluded, Getaway Weekends drop significantly and the overwhelming reason for Overnight Leisure travel becomes to Visit Friends or Relatives.

General Overnight Vacations and Special Events both decreased in 2020, while Visiting Friends and Relatives increased.

In 2020 visitors spent on average $112 in New Jersey per person per day - $2 less than in 2019 with increases in lodging (+$11) and food and beverage (+$3) but decreases in shopping (-$6) and entertainment (-$1). Atlantic City is driving the average daily spending for the State. Again, demonstrating the value of the Atlantic City area.

Purpose of Travel

OVERNIGHT LEISURE PERSON-STAYS (%) (2020)
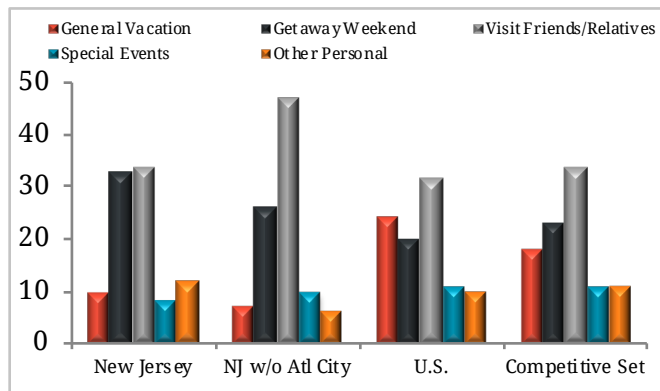
Per-Person-Per-Day Spending

OVERNIGHT LEISURE PERSON-DAYS (%) (2020)

Atlantic City area drives Weekend Getaways and Spending

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What type of accommodations do they stay in?

In 2020, 64% of Overnight Leisure visitors to New Jersey stayed in paid accommodations, which is just under the average U.S. destination and Competitive Set (both 68%). Among those staying in New Jersey's paid accommodations, 52% stay in hotels.

When Atlantic City is excluded from the analysis the percentage of visitors staying in paid accommodations drops to 50%, which is less than either the average U.S. destination or the Competitive Set. The percentage of paid accommodation visitors who stay in hotels drops to about 37%.

Among those visiting regions excluding Atlantic City, 45% are staying with Friends or Relatives. Thus, it is clear that the Atlantic City region is driving the large number of hotel stays in the State.

New Jersey

OVERNIGHT LEISURE PERSON-STAYS (2020)
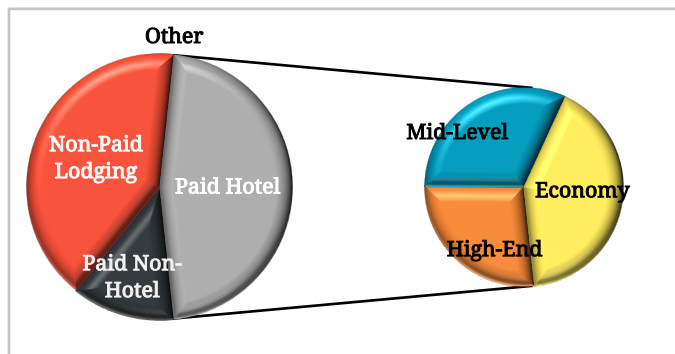
New Jersey without Atlantic City

OVERNIGHT LEISURE PERSON-STAYS (2020)
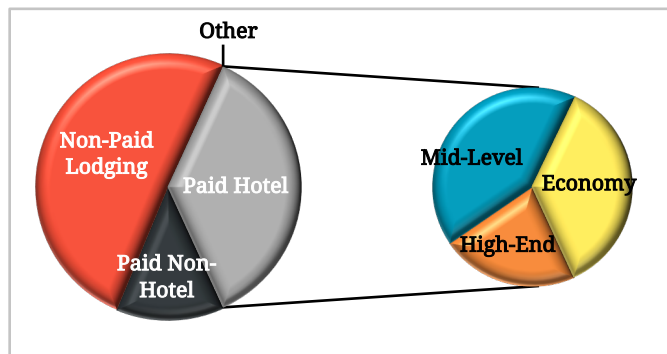
Among New Jersey as a whole, those who stay in hotels, choose Economy properties.

Who do they travel with; how long do they stay?

Travel parties consisting of one or two adults account for eight in ten of New Jersey's Overnight Leisure travel.

Not surprisingly, the portion of the State excluding Atlantic City accounts for a larger share of children present than does the entire state of New Jersey, indicating that travel parties to Atlantic City generally include fewer children and more adults.

At 2.20 persons, New Jersey's travel party average is larger than the Competitive Set (2.00 persons). If we exclude Atlantic City, the average size increases to 2.46 persons.

Travel Party Composition

OVERNIGHT LEISURE (%) STAYS (2019)

Legend: One Adult, Two Adults (M/F), Two Adults (M/M or F/F), 3+ Adults, Includes Children
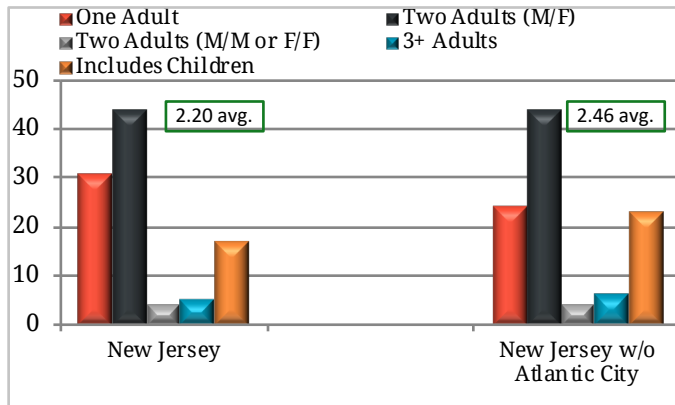
Stay Length

OVERNIGHT LEISURE (%) STAYS – (1+ NIGHTS) (2019)

Legend: One Night, 2 Nights, 3 Nights, 4-7 Nights, 8+ Nights

2.49 avg. (New Jersey) 2.64 avg. (New Jersey w/o Atlantic City)
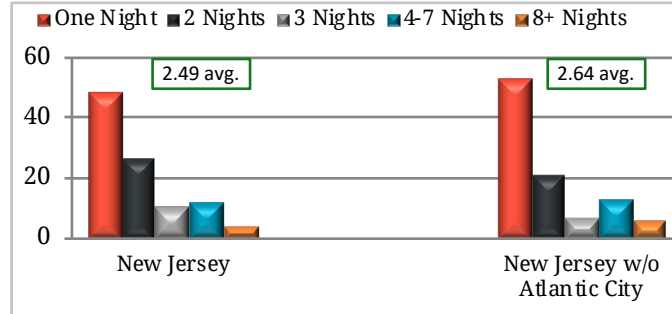
Among Overnight Leisure visitors, New Jersey travel parties stay 2.49 nights on average. Excluding Atlantic City with its many Weekend Getaway travelers results in a higher 2.64 nights length of stay.

The average length of stay has increased slightly from 2019.

Excluding Atlantic City: Longer Length of Stay than State as a Whole

What do New Jersey visitors do?

Three-quarters of Overnight Leisure travel parties participate in an activity when visiting the State.

Overnight Leisure travel parties who visit New Jersey participated in the following top five activities in 2020:

1. Gambling
2. Beach/Waterfront
3. Visiting Friends/Relatives
4. Culinary/Dining Experiences
5. Shopping

As would be expected, participation in most activities decreased substantially compared to 2019.

When excluding Atlantic City, the top five activities are relatively the same except Gambling drops to 27th place in 2020:

1. Visiting Friends/Relatives
2. Beach/Waterfront
3. Culinary/Dining Experience
4. Shopping
5. Holiday Celebration

New Jersey's Overnight Leisure travel parties (including Atlantic City) have a much higher propensity to participate in the following activities than travel parties to the average US destination:

- Gambling (3.2 times as high)
- Other Personal Celebrations (1.7 times)
- Spa (1.6 times)
- Beach/Waterfront (1.4 times)
- Service/Volunteerism/Charity (1.3 times)
- Bicycling (1.0 times)

New Jersey's Overnight Leisure travel parties' (excluding Atlantic City) propensity:

- Other Personal Celebrations (2.0 times as high)
- Service/Volunteerism/Charity (1.8 times)
- Spa (1.6 times)
- Beach/Waterfront (1.4 times)
- Bicycling (1.3 times)
- Holiday Celebrations (1.2 times)
- Winery/Distillery/Brewery Tours (1.1 times)

New Jersey can position itself as a destination for Family, Attraction and Nature-based activities

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How do New Jersey visitors rate the State?

Respondents are asked to rate their overall satisfaction with the destinations they visit as well as the overall value for the money the destination provides. Ratings are on a 10-point scale, where 1 is low or 'poor' and 10 is high or 'excellent'. Overnight Leisure visitors report lower satisfaction (69% excellent rating) with their New Jersey stay in 2020 than in 2019. New Jersey destinations as well as the competitor's destinations have consistently received a high percentage of Excellent (8-10) ratings for overall satisfaction with the destination. However, excellent satisfaction ratings for New Jersey, whether or not Atlantic City is included, had sizeable decreases in 2020 to 8.07 (New Jersey whole) and 7.97 (New Jersey without Atlantic City).

Value for the Money
OVERNIGHT LEISURE PERSON-STAYS (%) (2020)
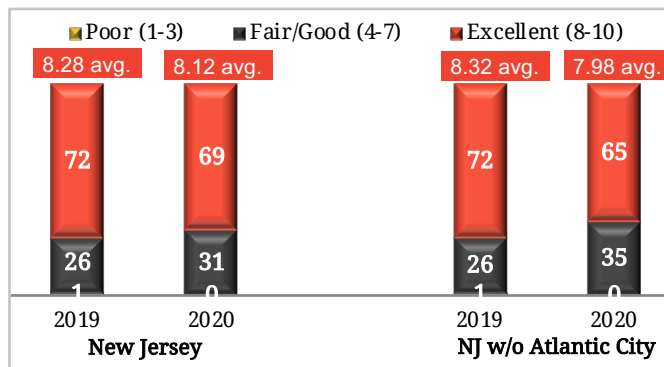
Overall, New Jersey's Overnight Leisure travelers report their highest ratings for Value for the Money (8.12), followed by Friendly/Helpful people (8.09). All ratings decreased in 2020.

When excluding Atlantic City, visitors rate New Jersey slightly lower in every performance attribute.

Overall Satisfaction
OVERNIGHT LEISURE PERSON-STAYS (%) (2020)

Satisfaction and Value displayed decreases from 2019.

Performance Ratings
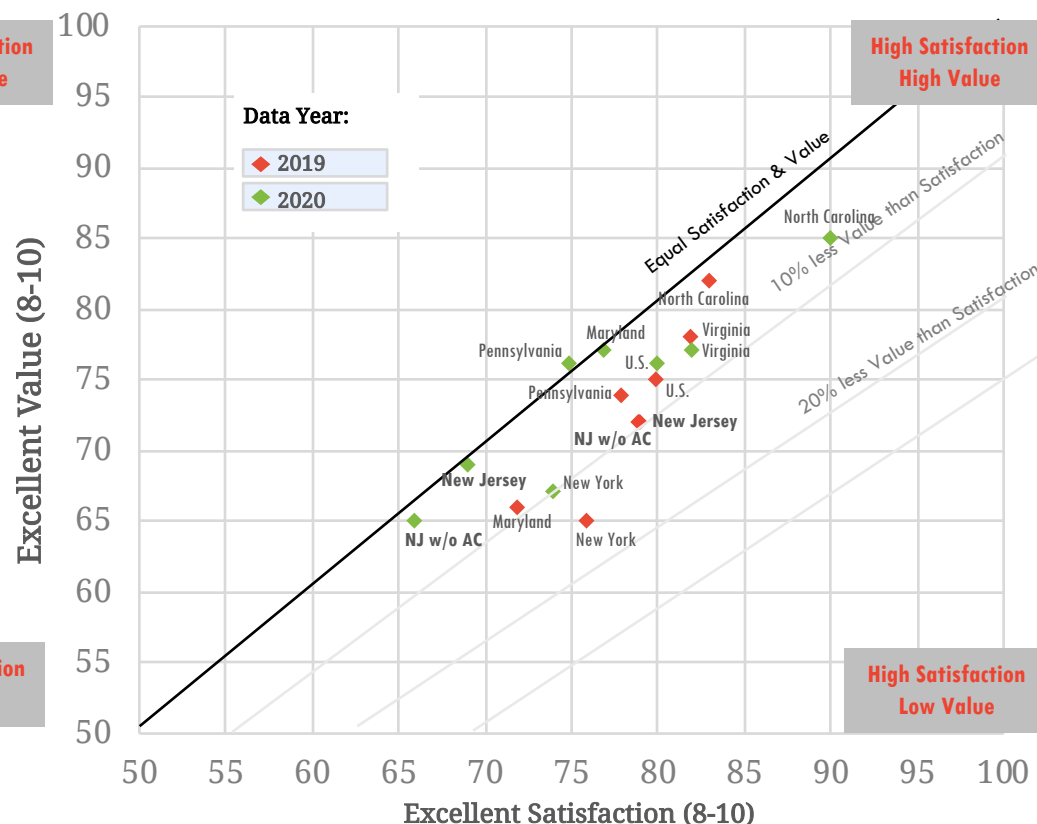
Satisfaction and Value ratings may be combined into a matrix which places each destination in the location where Satisfaction and Value intersect.

Destinations or segments fall into one of four quadrants. Those that are in the High Satisfaction/ High Value quadrant have the most loyal visitors. Those visitors are most likely not only to return, but they are likely to spend more, as well as provide invaluable word-of-mouth recommendations. The graph to the left shows these data for New Jersey, New Jersey without Atlantic City and the Competitive Set as well as the US average.
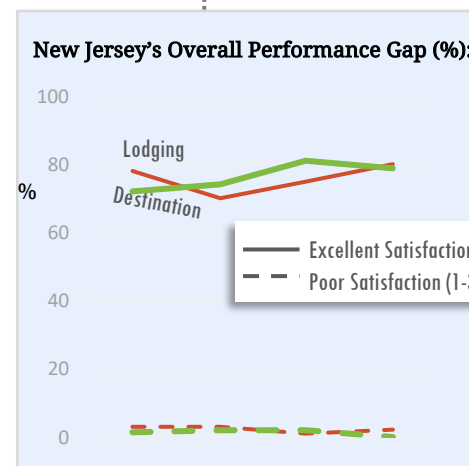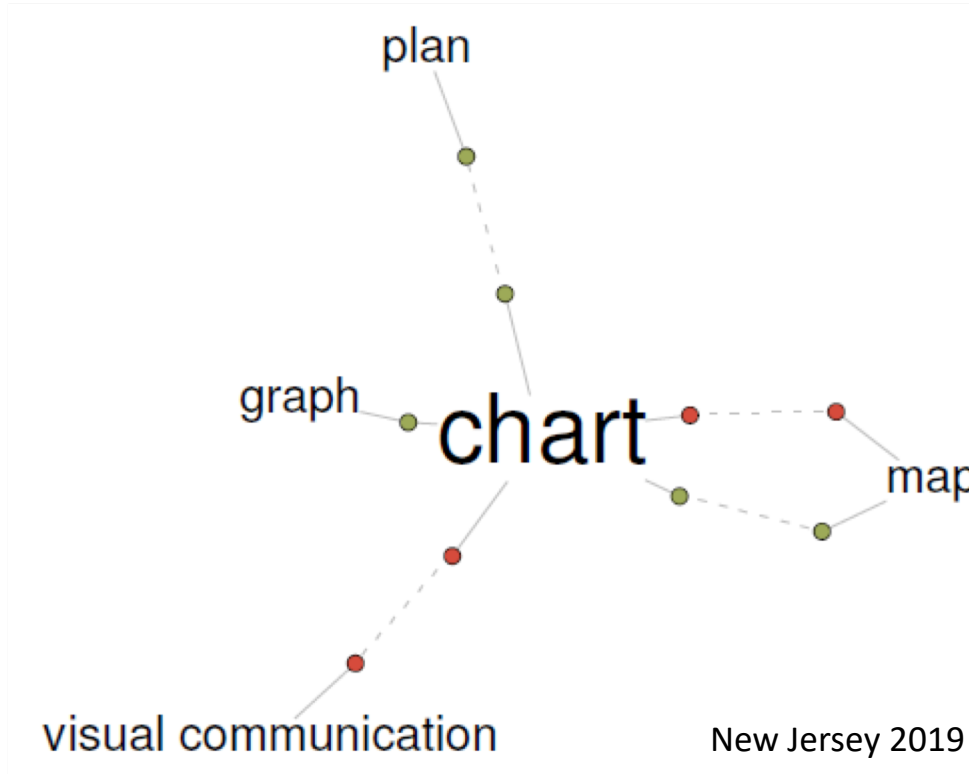
Charts and Graphs

New Jersey 2019 Overnight Leisure Visitor Profile

U.S. Travel Segments

Legend: ■ Stays ■ Person-Stays ■ Person-Days ■ Direct Spending

Business
- Stays: 26%
- Person-Stays: 19%
- Person-Days: 16%
- Direct Spending: 24%

Leisure
- Stays: 74%
- Person-Stays: 81%
- Person-Days: 84%
- Direct Spending: 76%

Day
- Stays: 54%
- Person-Stays: 51%
- Person-Days: 20%
- Direct Spending: 18%

Night
- Stays: 46%
- Person-Stays: 49%
- Person-Days: 80%
- Direct Spending: 82%

Night Leisure
- Stays: 36%
- Person-Stays: 41%
- Person-Days: 69%
- Direct Spending: 62%

Chart 1 • Segment: 2020 Total Volume (%)

New Jersey Travel Segments

Legend: ■ Stays ■ Person-Stays ■ Person-Days ■ Direct Spending

Business: 19%, 12%, 9%, 11%
Leisure: 81%, 88%, 91%, 89%
Day: 58%, 55%, 23%, 20%
Night: 42%, 45%, 77%, 80%
Night Leisure: 38%, 42%, 73%, 71%
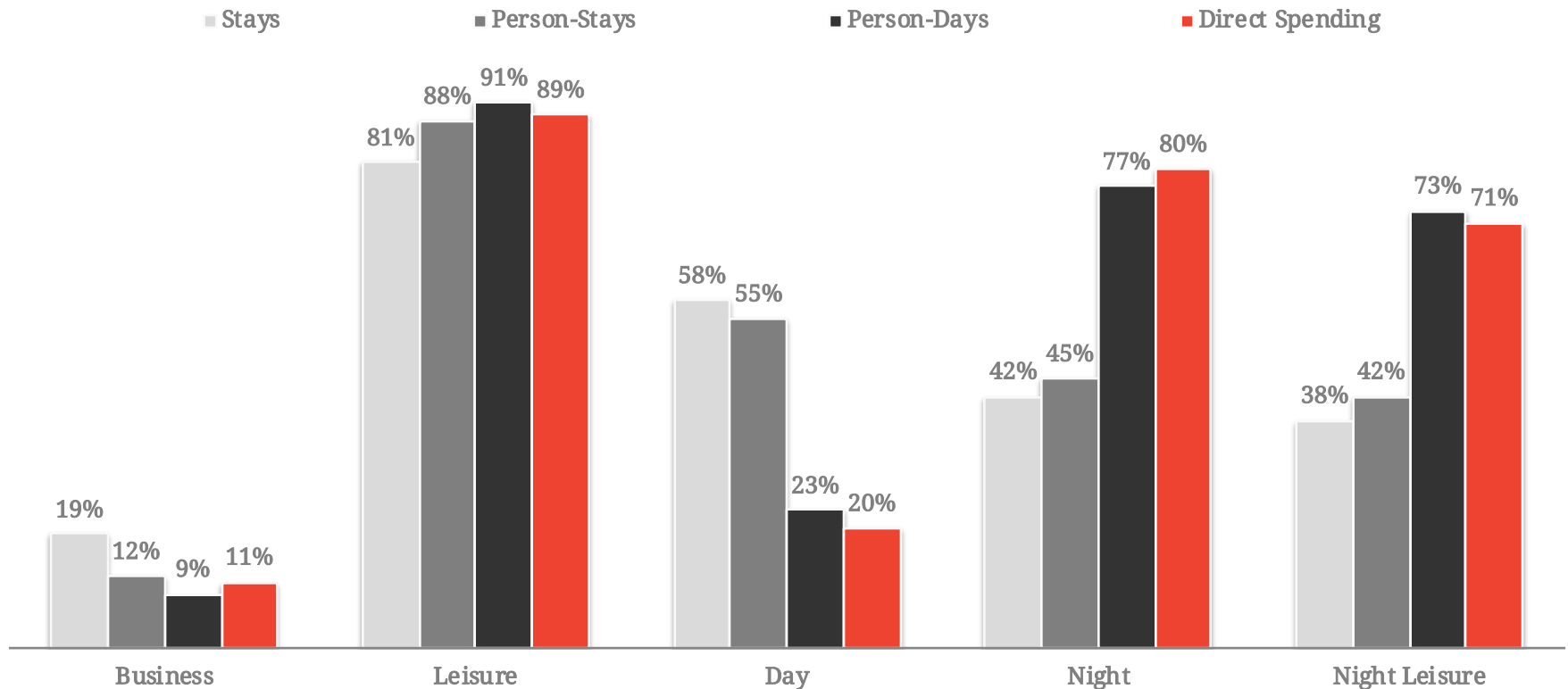
Chart 2 • Segment: 2020 Total Volume (%)

New Jersey Person-Stays Volume

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

	2013	2014	2015	2016	2017	2018	2019	2020
Total	87.8	91.4	93.5	97.3	101.9	110.0	114.5	84.2
Day Leisure	38.1	39.2	40.0	42.0	45.0	49.5	51.8	38.4
Night Leisure	37.5	39.4	40.8	42.8	45.0	47.9	49.8	35.7
Day Business	8.1	8.6	8.7	8.6	8.2	8.9	9.3	7.7
Night Business	4.2	4.2	4.0	3.9	3.6	3.7	3.6	2.4
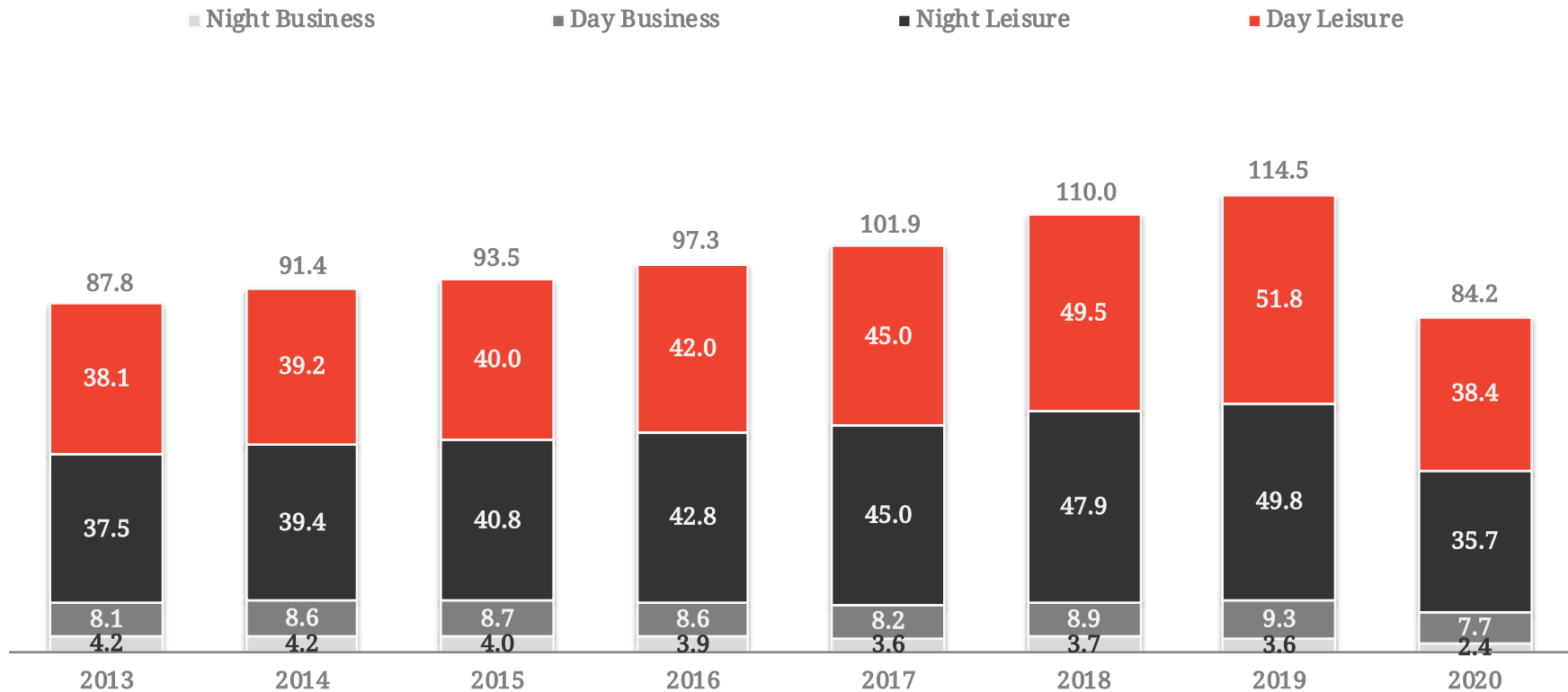
Chart 3 • in Millions

New Jersey Person-Stays Volume

	New Jersey							U.S.
	14/13	15/14	16/15	17/16	18/17	19/18	20/19	20/19
Total	4.1%	2.3%	4.0%	4.7%	8.0%	4.1%	-26.5%	-28.6%
Business	4.6%	-0.4%	-1.8%	-5.4%	6.5%	2.5%	-22.0%	-29.8%
Leisure	4.0%	2.8%	4.9%	6.2%	8.2%	4.3%	-27.1%	-28.2%
Day	3.6%	2.0%	3.8%	5.1%	9.8%	4.6%	-24.6%	-27.0%
Night	4.6%	2.7%	4.3%	4.2%	6.0%	3.5%	-28.6%	-30.2%
Day Business	7.0%	1.4%	-1.1%	-4.8%	8.2%	4.9%	-17.2%	-26.3%
Day Leisure	2.8%	2.2%	4.9%	7.1%	10.1%	4.6%	-25.9%	-27.1%
Night Business	0.0%	-4.2%	-3.2%	-6.7%	2.6%	-3.2%	-34.2%	-34.5%
Night Leisure	5.1%	3.4%	5.0%	5.2%	6.3%	4.0%	-28.2%	-29.3%

Chart 4 • % change

28

New Jersey Direct Spending Volume

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

	2013	2014	2015	2016	2017	2018	2019	2020
Total	$18,565.9	$19,258.1	$20,168.4	$20,955.6	$21,617.8	$23,188.3	$24,166.8	$17,405.6
Day Leisure	2,870.7	2,956.3	3,058.0	3,163.1	3,281.7	3,628.3	3,848.8	3,010.6
Night Leisure	12,794.6	13,397.6	14,227.9	14,970.2	15,561.8	16,727.5	17,504.4	12,433.1
Night Business	592.7	611.5	589.0	561.8	533.3	592.3	622.0	531.2
Day Business	2,339.1	2,308.9	2,293.8	2,294.5	2,261.6	2,326.6	2,191.6	1,430.7
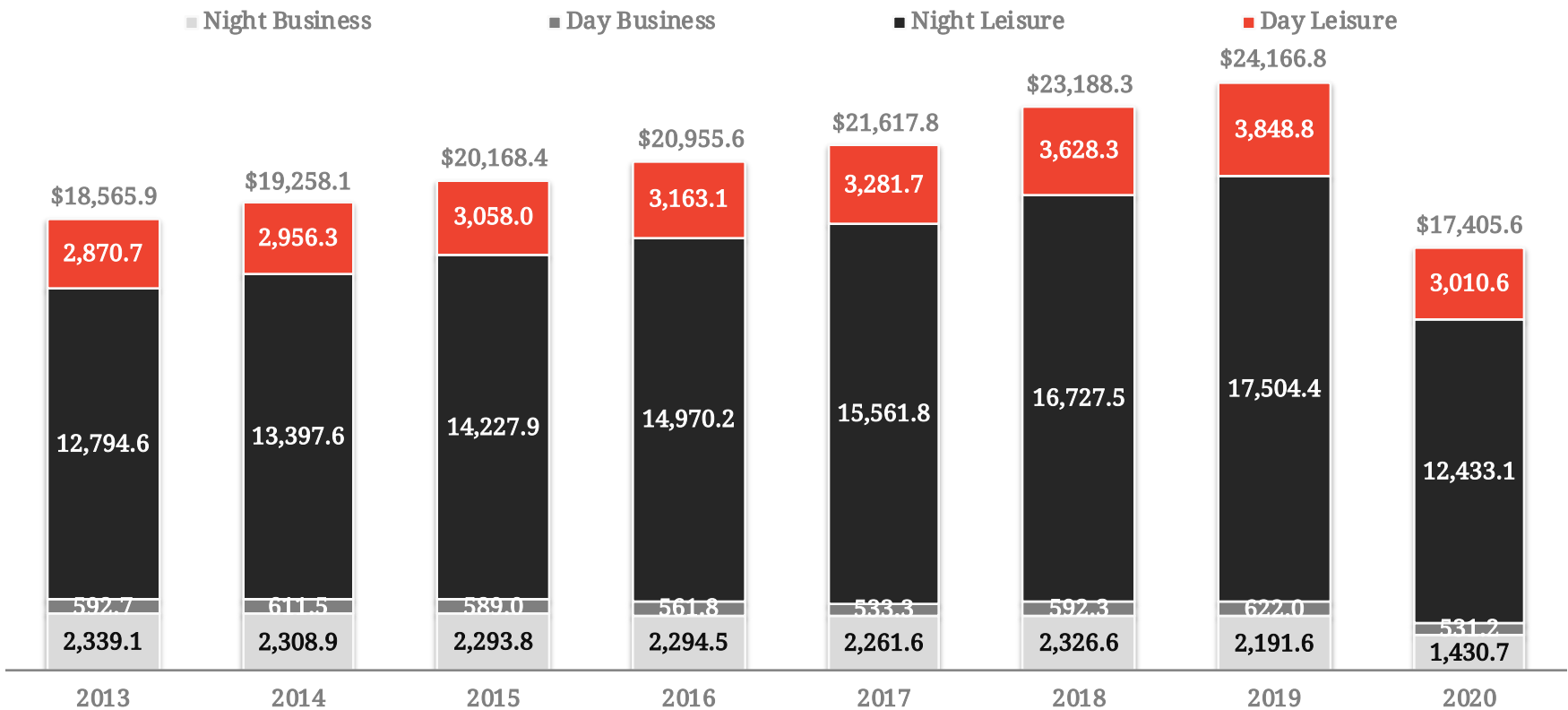
Chart 5 • $ Millions

New Jersey Direct Spending Volume

	New Jersey							U.S.
	14/13	**15/14**	**16/15**	**17/16**	**18/17**	**19/18**	**20/19**	**20/19**
Total	3.7%	4.7%	3.9%	3.2%	7.3%	4.2%	-28.0%	-27.0%
Business	0.1%	-0.7%	-2.1%	-1.7%	2.1%	-0.7%	-30.3%	-28.6%
Leisure	4.4%	5.7%	4.9%	3.9%	8.0%	4.9%	-27.7%	-26.4%
Day	3.0%	2.2%	2.1%	2.4%	10.6%	5.9%	-20.8%	-14.1%
Night	3.9%	5.3%	4.3%	3.3%	6.5%	3.8%	-29.6%	-29.3%
Day Business	3.2%	-3.7%	-4.6%	-5.1%	11.1%	5.0%	-14.6%	5.0%
Day Leisure	3.0%	3.4%	3.4%	3.8%	10.6%	6.1%	-21.8%	-19.6%
Night Business	-0.7%	0.0%	-1.4%	-0.9%	0.0%	-2.2%	-34.7%	-33.9%
Night Leisure	4.7%	6.2%	5.2%	4.0%	7.5%	4.6%	-29.0%	-27.7%

Chart 6 • % change

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

■ Stays　　　■ Person-Stays　　　■ Person-Days　　　■ Stay-Dollars

	Stays	Person-Stays	Person-Days	Stay-Dollars
New Jersey	1.9	2.1	1.8	1.5
NJ w/o Atl City	1.3	1.5	1.3	1.0
New York	4.5	4.1	4.0	4.7
Pennsylvania	3.4	3.6	3.0	2.5
Maryland	1.1	1.0	1.1	0.8
Virginia	2.3	2.5	2.6	2.3
North Carolina	3.7	3.9	3.7	3.1
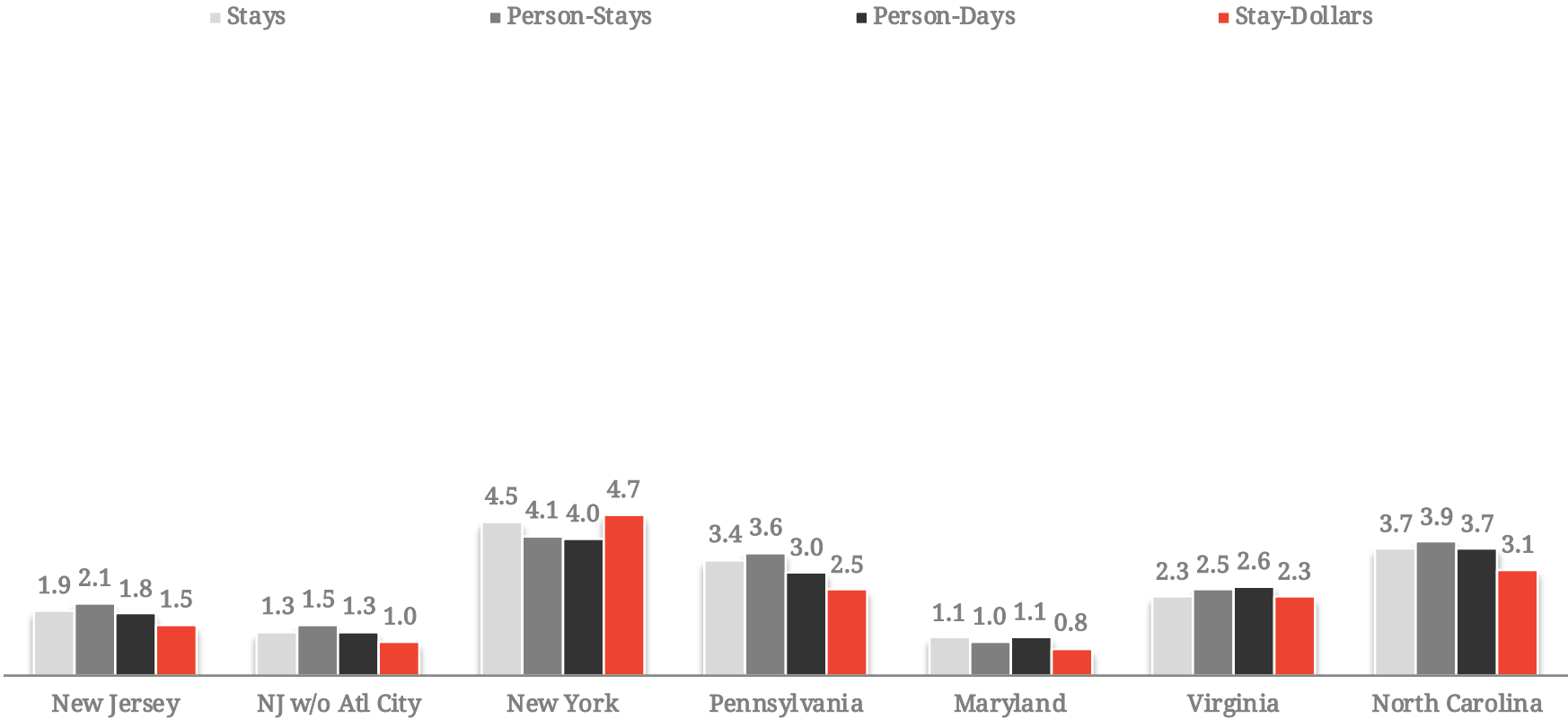
Chart 7 • Segment: 2020 Overnight Leisure (%) • New Jersey n = 486 household count

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

Average		18-34 years	35-54 years	55 + years
55	U.S.	17	27	57
54	New Jersey	7	48	45
52	NJ w/o Atl City	7	55	39
55	Comp Set	19	22	59
51	New York	27	22	51
53	Pennsylvania	21	22	56
56	Maryland	17	21	62
58	Virginia	12	21	66
58	North Carolina	12	24	64
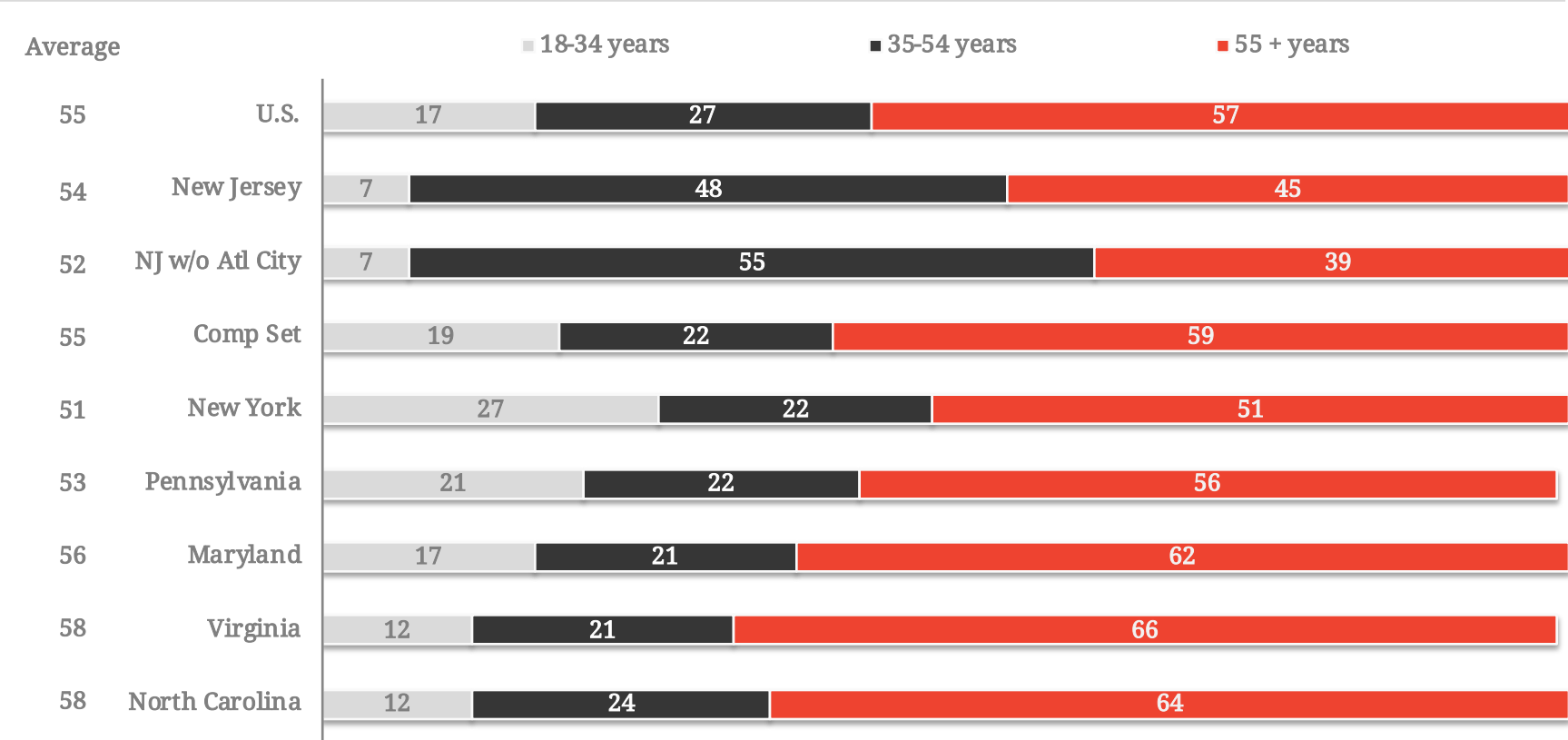
Chart 8 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 486 household count

New Jersey Avg. Party per Stay Spending by Age
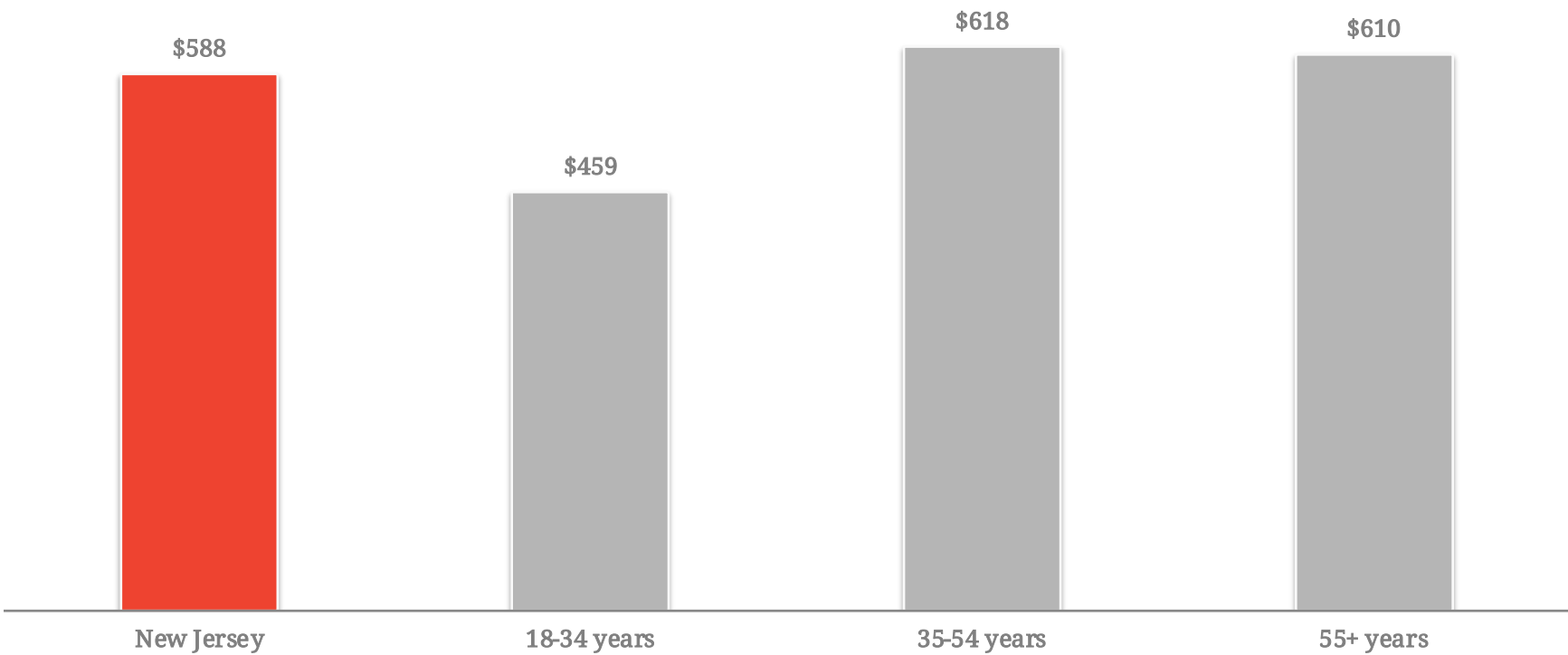
Chart 9 • Segment: 2018-2020 Overnight Leisure Stays ($) • New Jersey n = 2,510 household count

New Jersey Age Comparison

■ Stays Based   ■ Stay-Dollars Based

	18-34 years	35-54 years	55+ years
Stays Based	16	31	53
Stay-Dollars Based	13	32	55
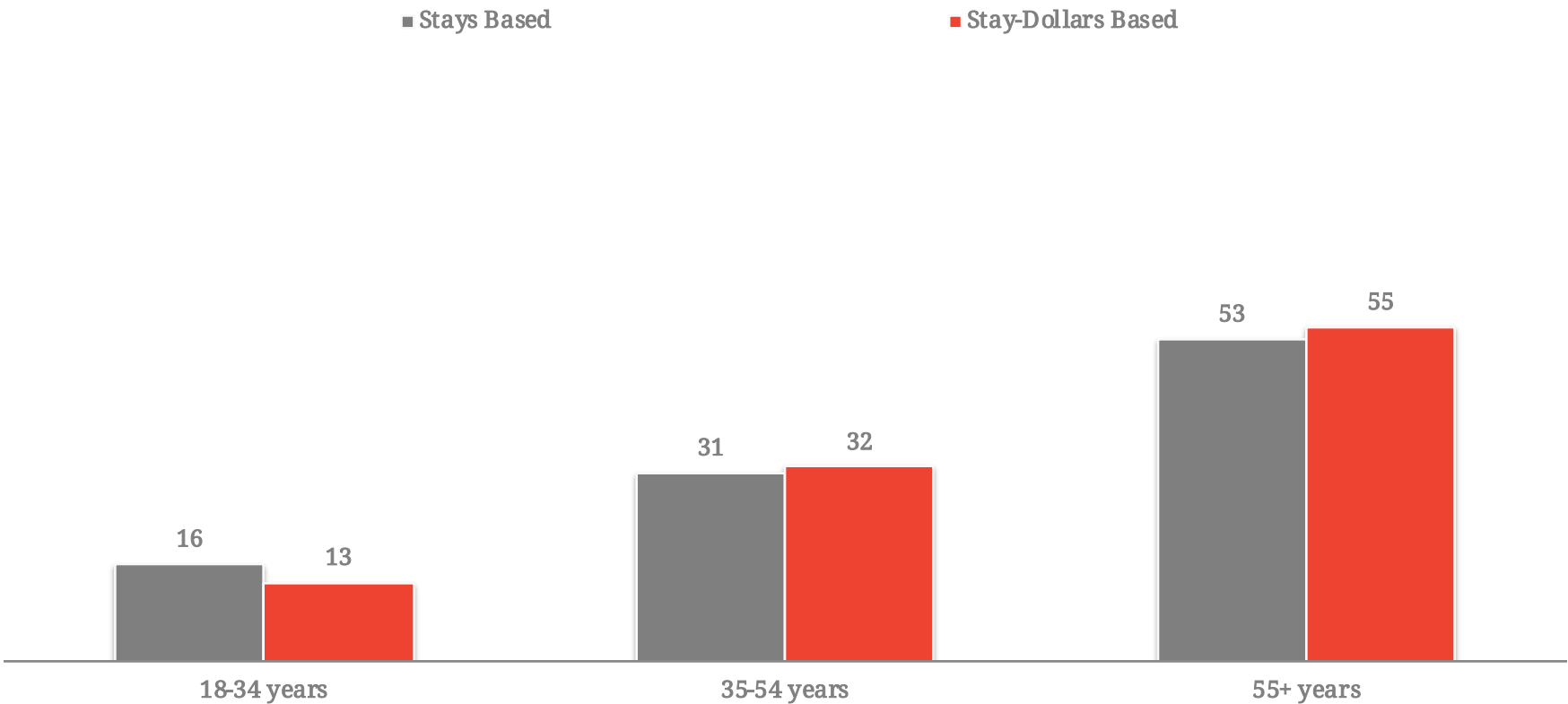
Chart 10 • Segment: 2018-2020 Overnight Leisure (%) • New Jersey n = 2,875 household count

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

Legend: ■ White ■ Black ■ Asian ■ Native American/Alaska Native ■ Other/Mixed

Location	White	Black	Asian	Native American/Alaska Native	Other/Mixed
U.S.	86	8	4	2	2
New Jersey	74	11	2	10	1
NJ w/o Atl City	73	7	2	14	2
Comp Set	82	13	3	3	2
New York	81	12	5	4	2
Pennsylvania	84	13	5	3	1
Maryland	86	11	1	6	
Virginia	80	11	3	1	7
North Carolina	82	14	1	2	

Chart 11 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 482 household count
^Note: The total may add to more than 100% due to multiple responses

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Ethnic Origin:
U.S., New Jersey and Comp Set

DEMOGRAPHICS

- Hispanic or Latino
- Non-Hispanic or Latino

	U.S.	New Jersey	NJ w/o Atl City	Comp Set	New York	Pennsylvania	Maryland	Virginia	North Carolina
Non-Hispanic or Latino	92	87	85	92	88	96	92	91	93
Hispanic or Latino	8	13	15	8	12	4	8	9	7

Chart 12 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 482 household count

Sexual Orientation:
U.S., New Jersey and Comp Set

■ Gay/Lesbian (LGBTQ)　　■ Heterosexual/ Straight　　■ Other

	Gay/Lesbian (LGBTQ)	Heterosexual/ Straight	Other
U.S.	3	94	4
New Jersey	2	96	2
NJ w/o Atl City	2	96	3
Comp Set	2	94	4
New York	2	91	7
Pennsylvania	2	96	2
Maryland	0	95	5
Virginia	2	94	3
North Carolina	1	96	3

Chart 13 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 486 household count

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

Legend: ▫ No Children ▪ 5 years old or younger ■ 6-12 years old ■ 13-17 years old

	No Children	5 years old or younger	6-12 years old	13-17 years old
U.S.	77	7	12	13
New Jersey	70	1	24	26
NJ w/o Atl City	63	1	31	33
Comp Set	82	5	10	8
New York	82	3	9	9
Pennsylvania	83	4	10	8
Maryland	76	6	15	12
Virginia	84	3	9	9
North Carolina	81	8	9	7

Chart 14 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 486 household count
^Note: The total may add to more than 100% due to multiple responses

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

DEMOGRAPHICS

Average

	Under $50,000	$50,000 - $74,999	$75,000 - $99,999	$100,000 -$149,999	$150,000+
$110,247 U.S.	22	19	16	22	21
$120,499 New Jersey	12	22	16	30	20
$121,827 NJ w/o Atl City	9	24	15	33	19
$113,917 Comp Set	24	17	15	21	23
$124,039 New York	20	17	14	22	27
$121,786 Pennsylvania	25	13	16	21	24
$117,323 Maryland	21	16	23	20	20
$115,545 Virginia	22	11	17	25	25
$94,241 North Carolina	29	27	12	17	15
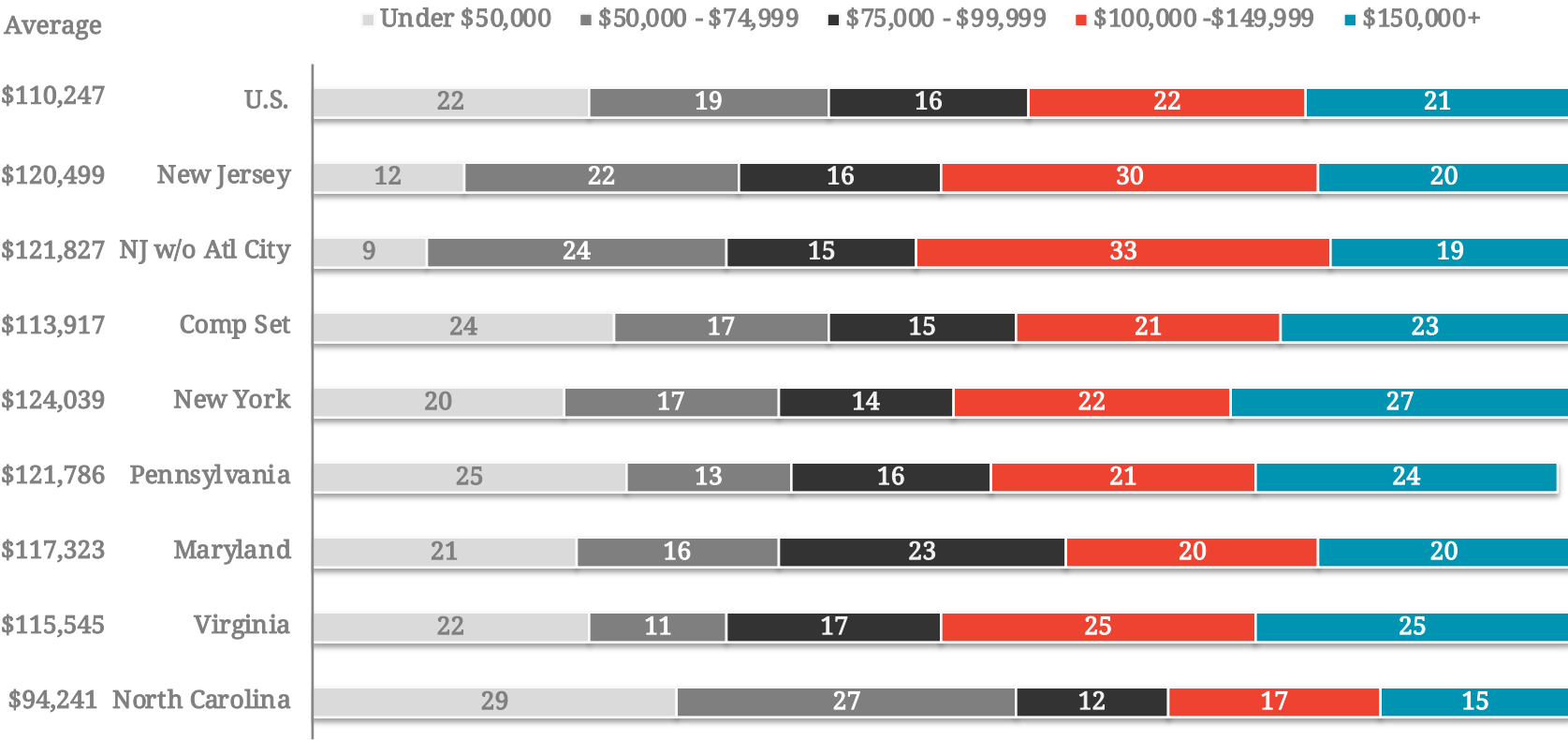
Chart 15 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 483 household count

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

Legend: ■ Young & Free ■ Young Family ■ Maturing & Free ■ Moderate Family ■ Affluent Family ■ Moderate Mature ■ Affluent Mature

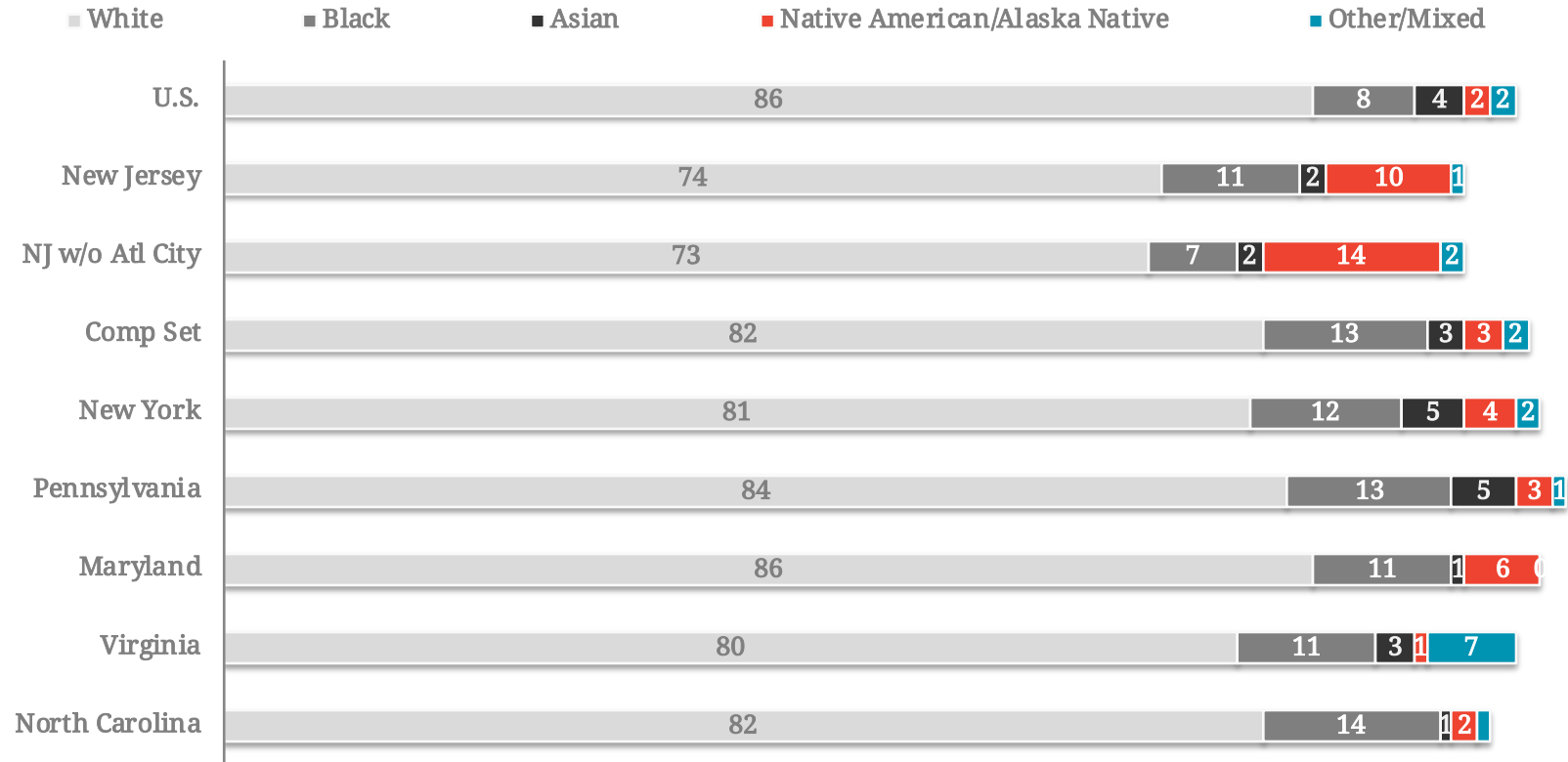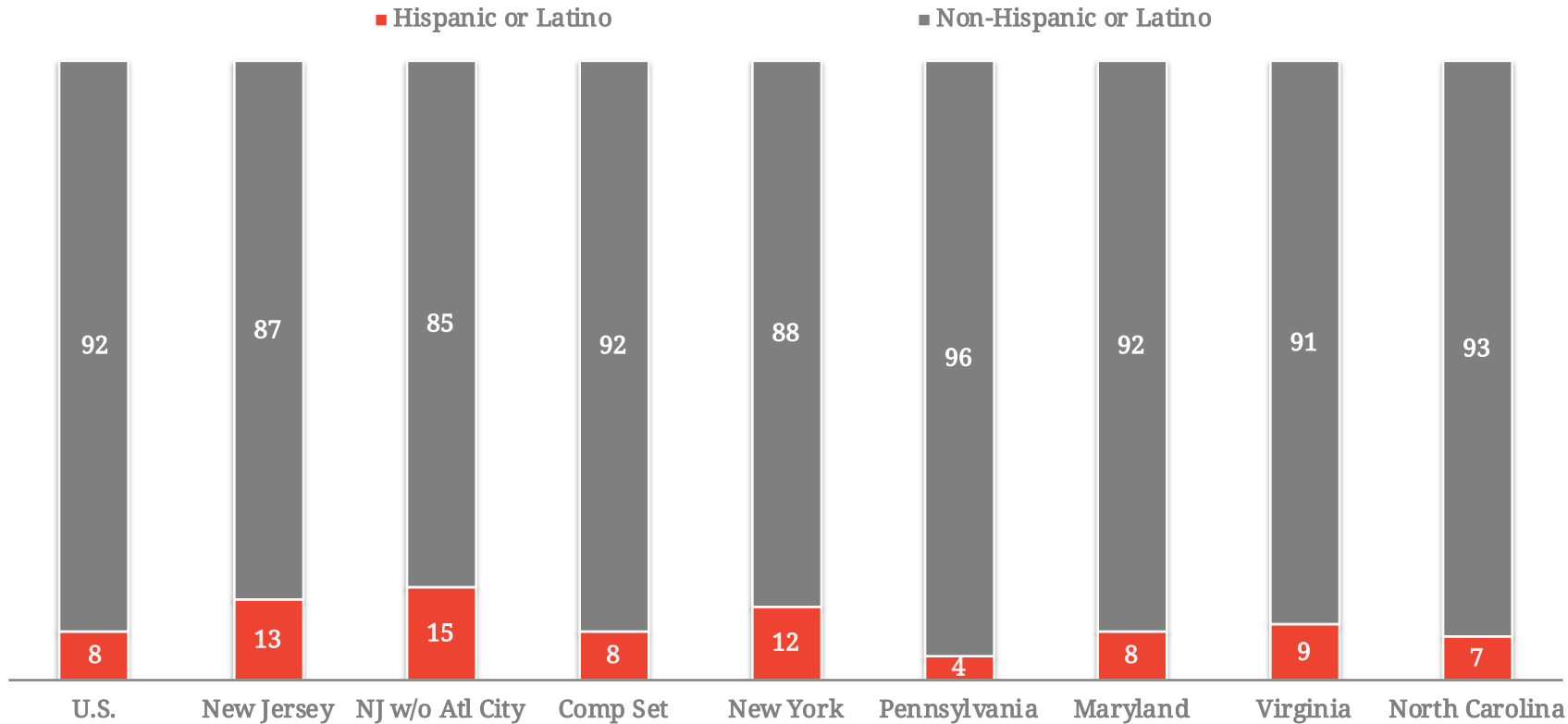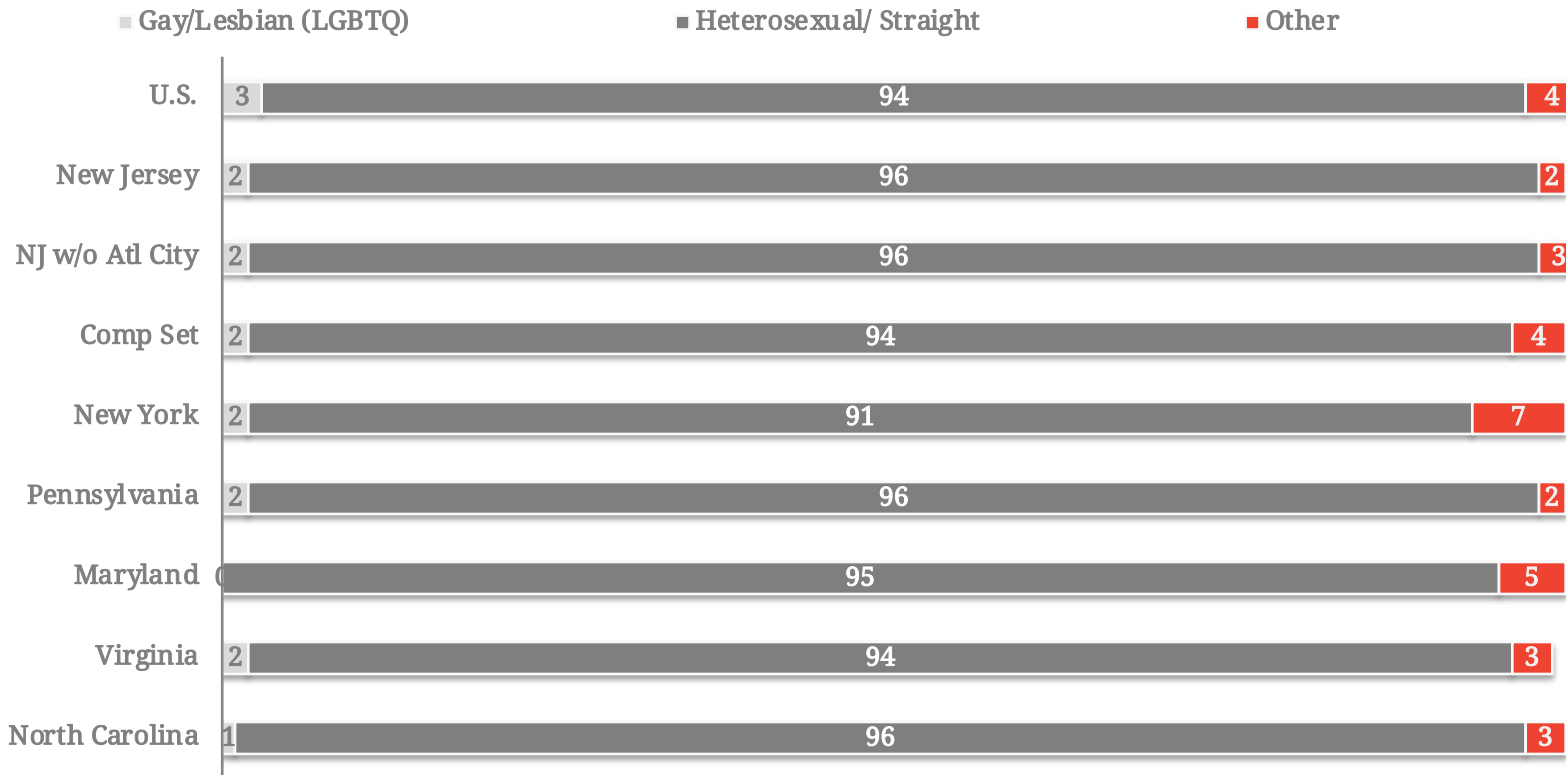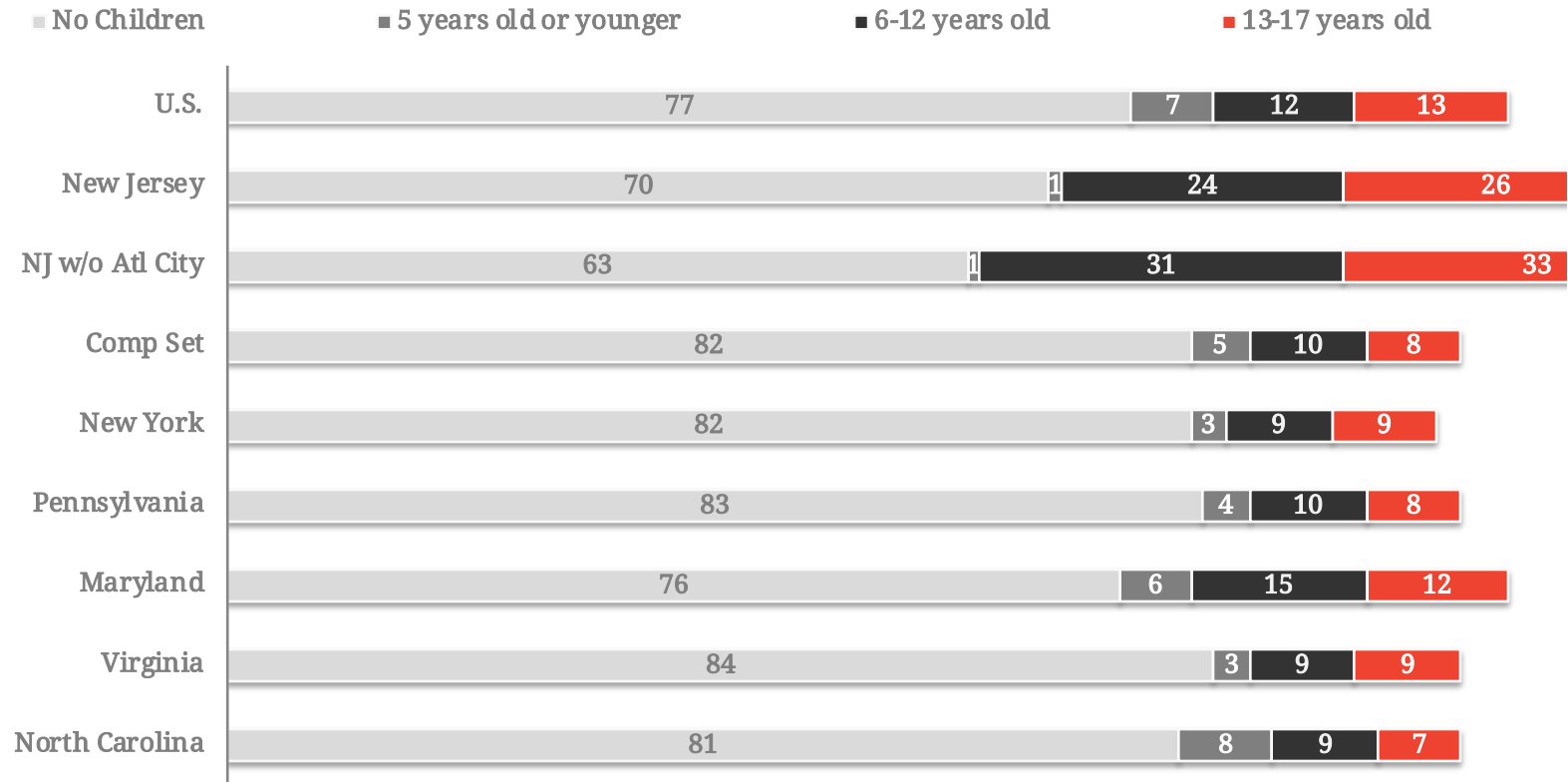| Region	Young & Free	Young Family	Maturing & Free	Moderate Family	Affluent Family	Moderate Mature	Affluent Mature
U.S.	12	5	14	3	10	16	34
New Jersey	6	1	25	1	23	9	30
NJ w/o Atl City	7	0	24	0	30	8	24
Comp Set	15	4	12	3	7	17	37
New York	23	4	14	1	8	11	34
Pennsylvania	18	3	13	3	7	16	35
Maryland	13	5	8	1	12	14	41
Virginia	9	4	12	3	6	15	47
North Carolina	8	4	11	7	6	27	36

Chart 16 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 486 household count

^Note: The total may add to less than 100% due to non-responses

New Jersey Avg. Party per Stay Spending by Lifestage
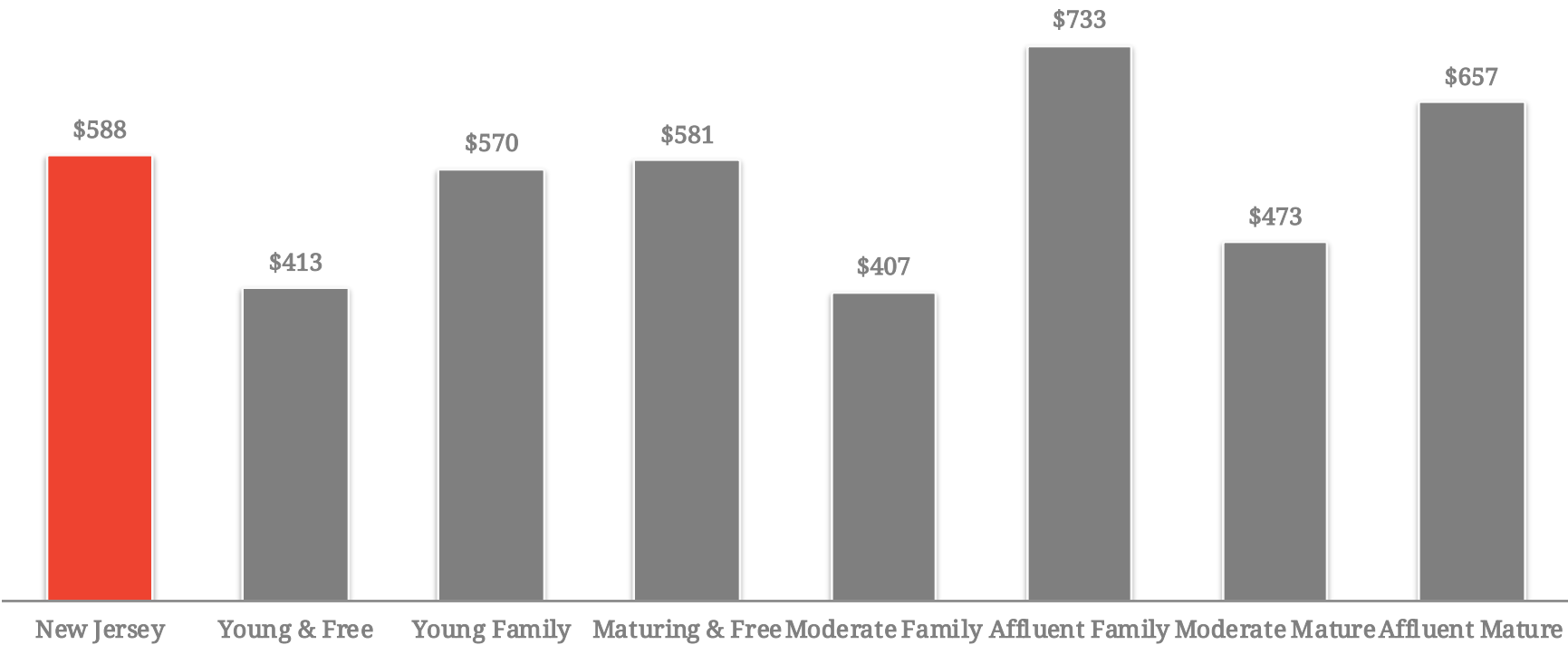
Chart 17 • Segment: 2018-2020 Overnight Leisure Stays ($) • New Jersey n = 2,511 household count

New Jersey Lifestage Comparison

■ Stays Based   ■ Stay-Dollars Based

Lifestage	Stays Based	Stay-Dollars Based
Young & Free	12	9
Young Family	4	4
Maturing & Free	14	14
Moderate Family	5	3
Affluent Family	12	15
Moderate Mature	13	12
Affluent Mature	34	37
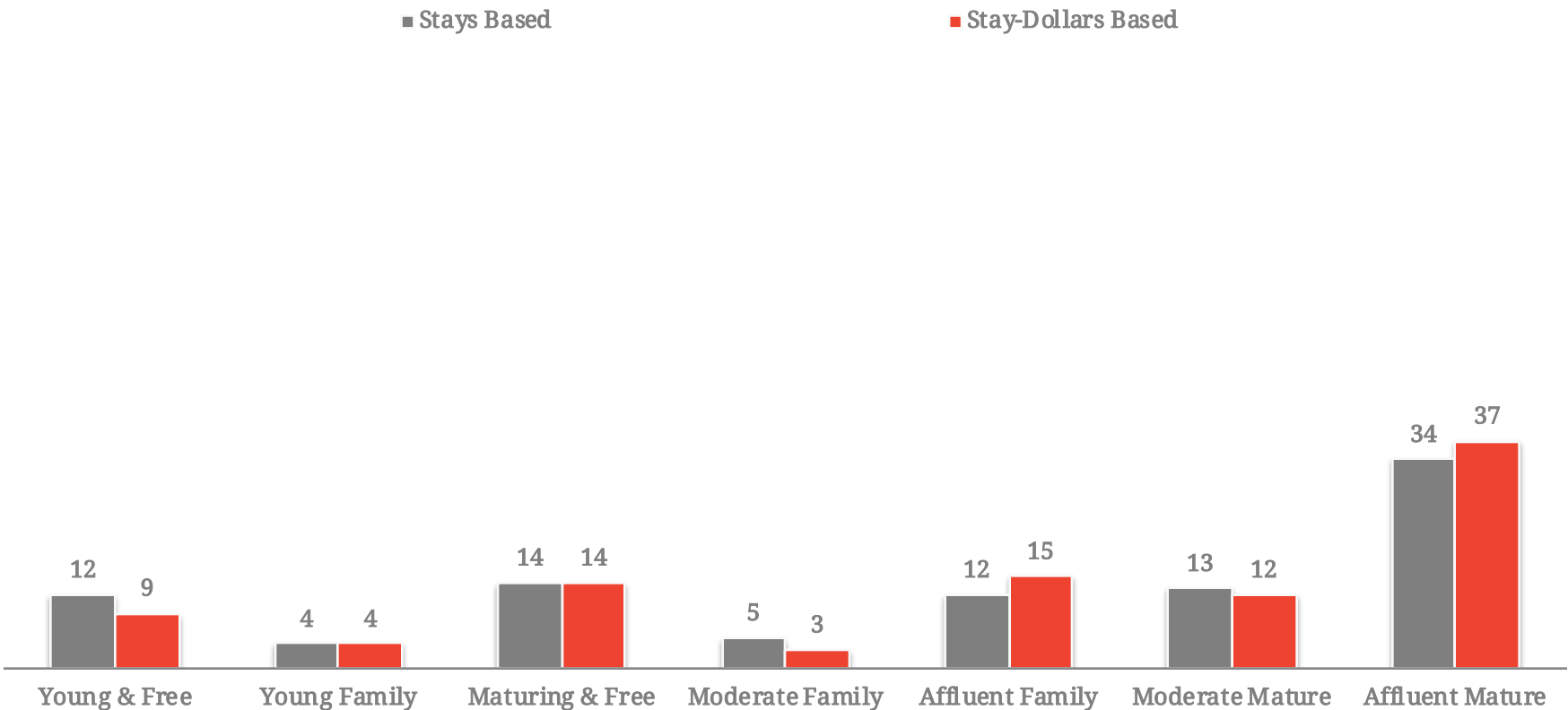
Chart 18 • Segment: 2018-2020 Overnight Leisure (%) • New Jersey n = 2,876 household count

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

Legend: ■ Millennials   ■ GenXers   ■ Boomers   ■ Silents/Gis

Region	Millennials	GenXers	Boomers	Silents/Gis
U.S.	20	23	48	7
New Jersey	20	35	40	5
NJ w/o Atl City	22	39	35	3
Comp Set	20	18	50	8
New York	27	18	45	5
Pennsylvania	21	16	49	6
Maryland	20	19	49	10
Virginia	14	18	59	7
North Carolina	17	18	50	14
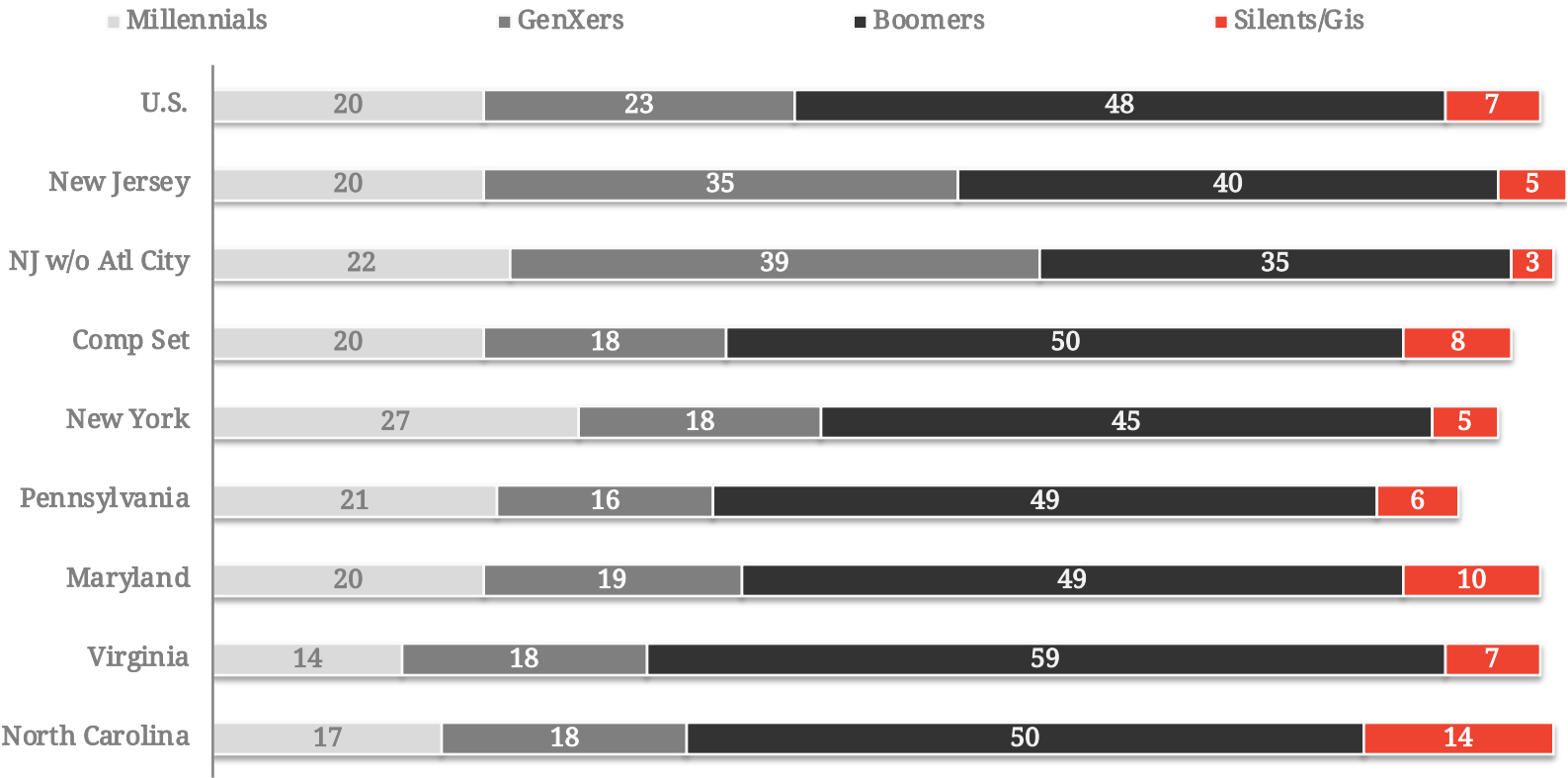
Chart 19 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 486 household count

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New Jersey Avg. Party per Stay Spending by Generation
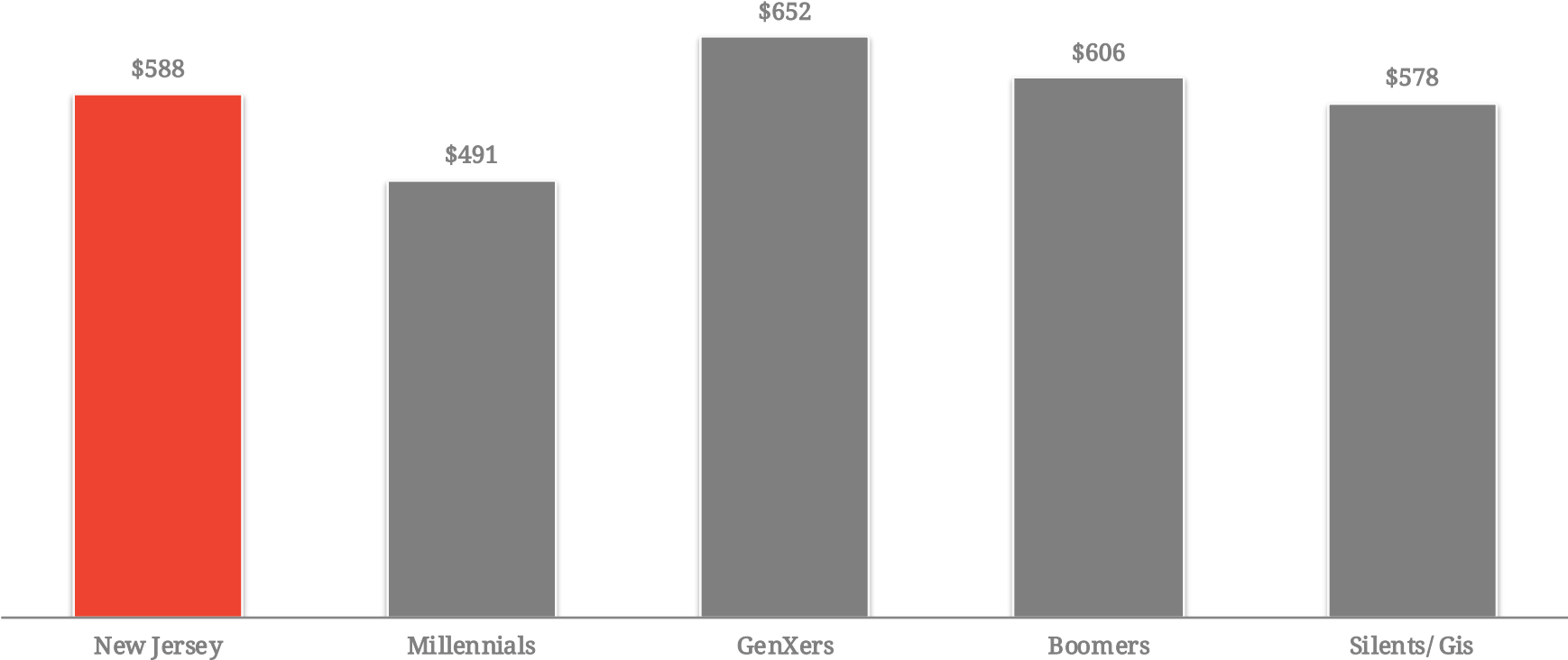
Chart 20 • Segment: 2018-2020 Overnight Leisure Stays ($) • New Jersey n = 2,510 household count

New Jersey Traveler Generation Comparison

■ Stays Based   ■ Stay-Dollars Based

	Millennials	GenXers	Boomers	Silents/Gis
Stays Based	21	24	45	9
Stay-Dollars Based	19	25	48	7
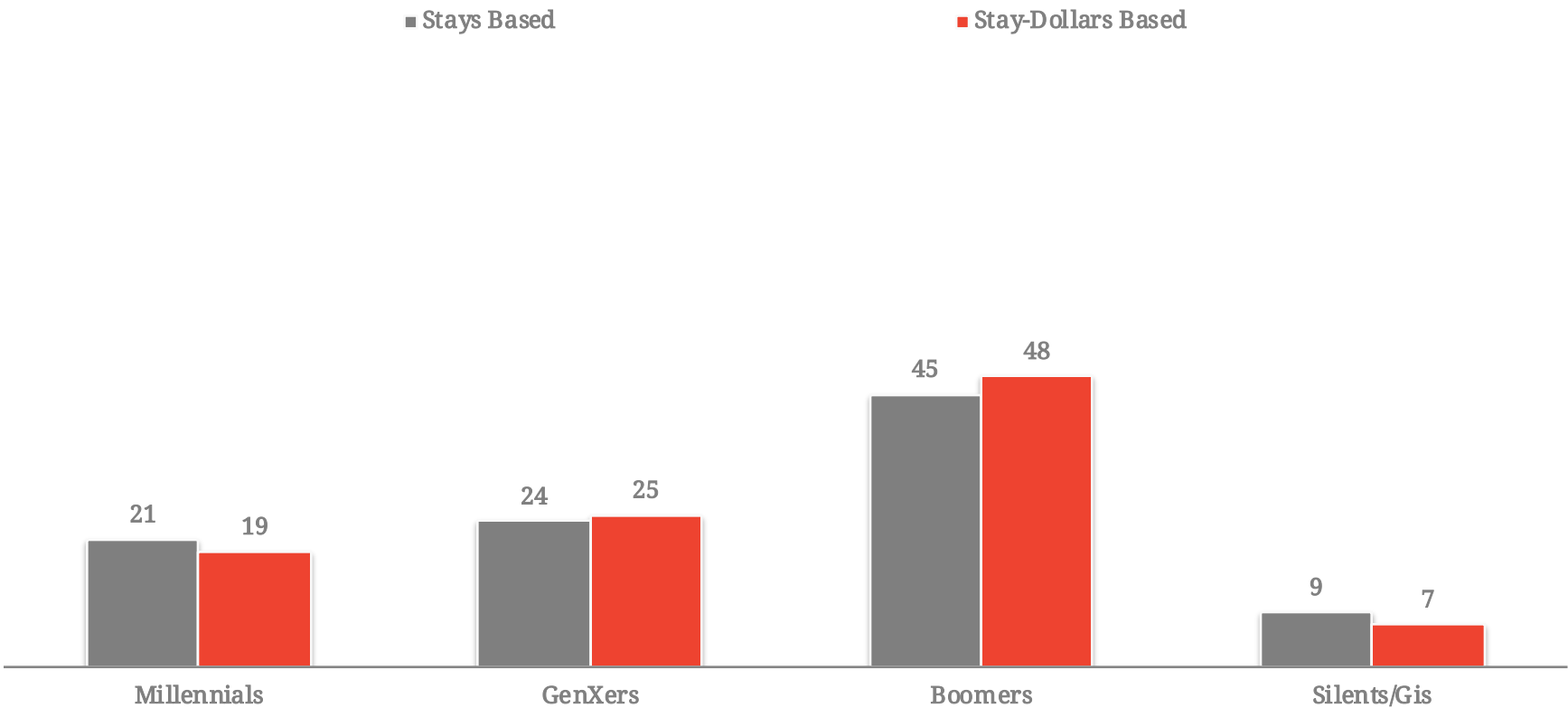
Chart 21 • Segment: 2018-2020 Overnight Leisure (%) • New Jersey n = 2,875 household count

45

Origin Divisions for Travel to New Jersey
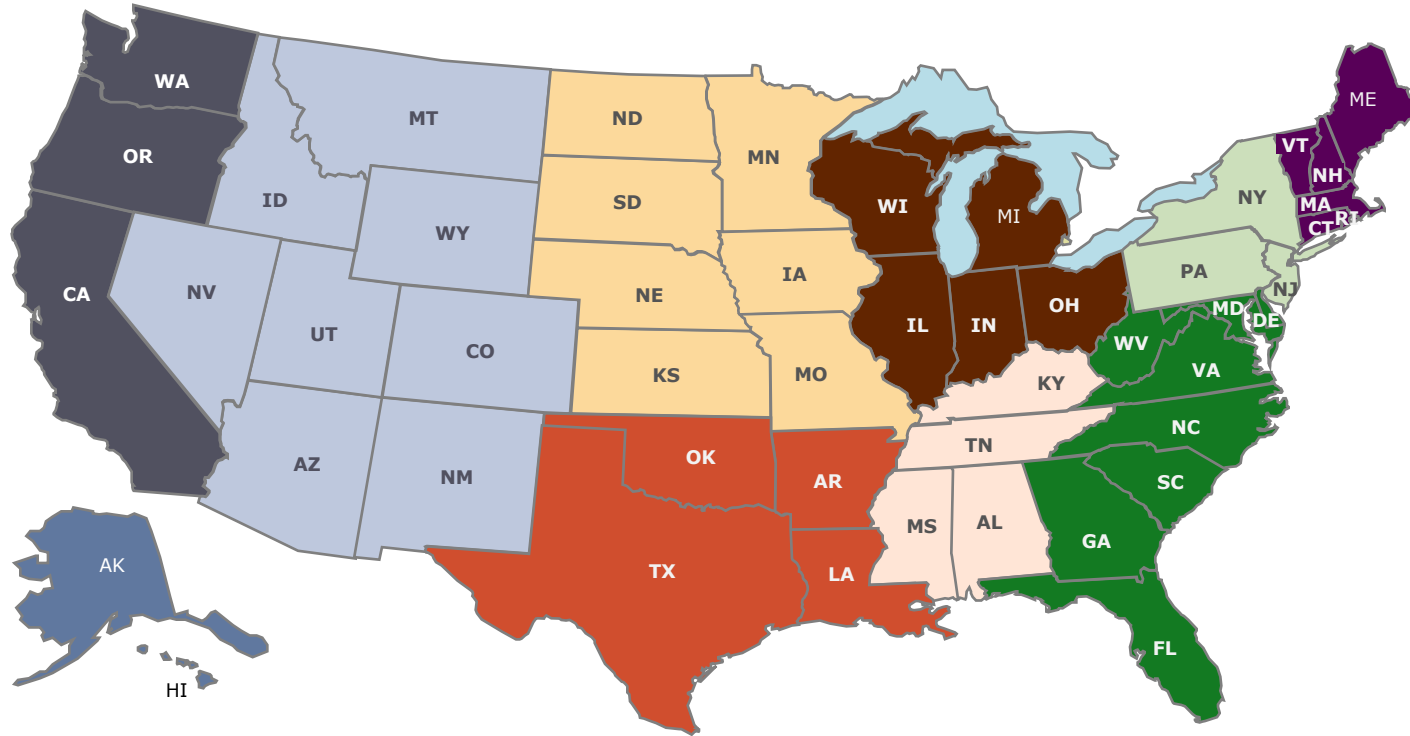
LEGEND

■	Pacific	3.0%
■	Mountain	0.9%
■	West North Central	0.3%
■	West South Central	1.8%
■	East North Central	1.5%
■	East South Central	0.1%
■	New England	4.8%
■	Middle Atlantic	76.0%
■	South Atlantic	11.6%

Chart 22 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 485 household count

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Top Origin States to New Jersey

LEGEND

🟥	36.1% New York
🟧	21.9% New Jersey
	18.0% Pennsylvania
🟧	4.5% Maryland
	2.2% Florida
	2.0% California
	1.6% Virginia
	1.5% Rhode Island
	1.3% Massachusetts
	1.3% Texas
	1.2% Georgia

Chart 23 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 485 household count

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Top Origin DMAs to New Jersey

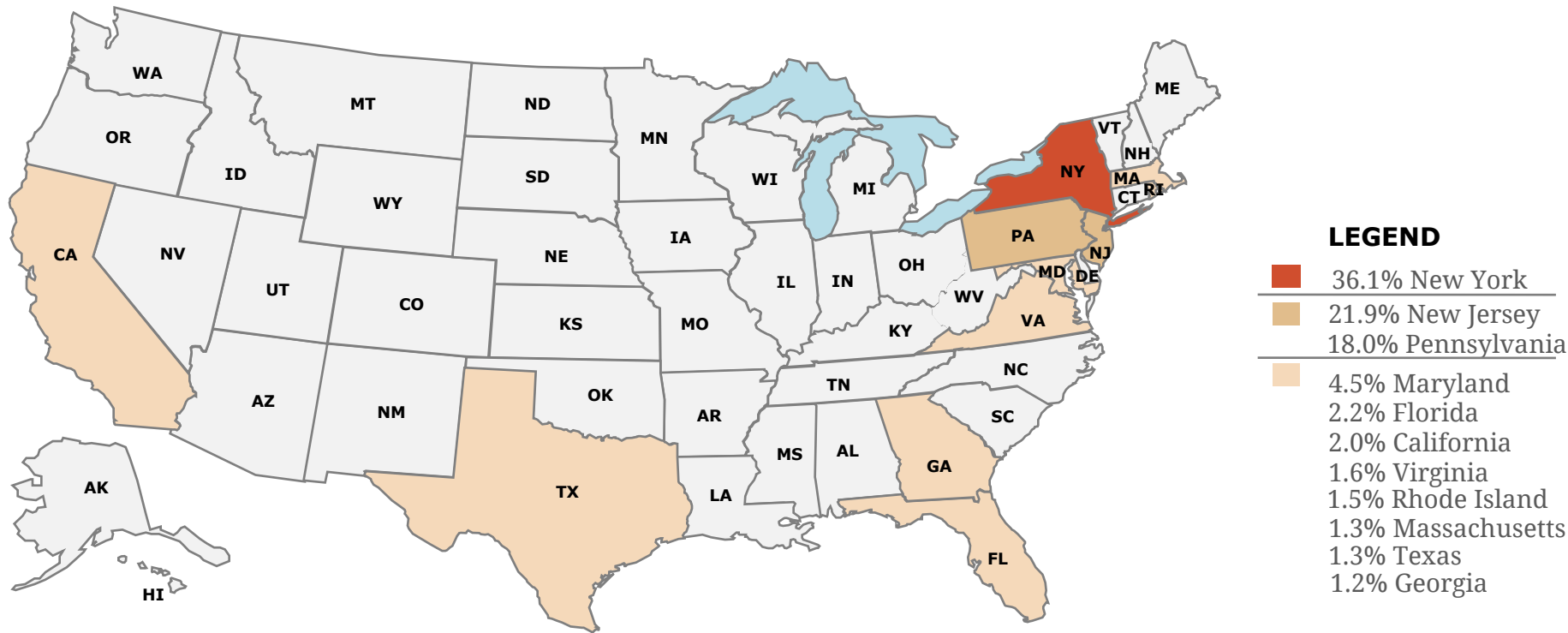|	U.S.	New Jersey	NJ w/o Atl City	Comp Set	New York	Pennsylvania	Maryland	Virginia	North Carolina
New York, NY	4.7%	53.1%	56.7%	10.3%	19.2%	9.1%	8.8%	9.2%	3.1%
Philadelphia, PA	2.7%	17.8%	15.3%	8.2%	5.6%	18.3%	10.5%	7.1%	1.7%
Washington, DC (Hagerstown, MD)	2.4%	3.7%	4.5%	6.6%	4.0%	6.7%	17.0%	13.4%	2.3%
Baltimore, MD	0.9%	1.8%	1.1%	2.7%	1.8%	5.0%	9.3%	2.0%	0.4%
Pittsburgh, PA	1.5%	1.7%	0%	5.0%	0.5%	14.5%	9.1%	3.0%	1.0%
Boston, MA (Manchester, NH)	2.4%	1.6%	1.6%	3.6%	10.4%	1.8%	0.3%	1.0%	0.4%
Providence, RI-New Bedford, MA	0.3%	1.5%	0.3%	0.1%	0.2%	0.1%	0.3%	0.1%	0.1%
Atlanta, GA	2.4%	1.2%	*	3.4%	0.4%	1.4%	1.7%	2.9%	9.0%
San Francisco – Oakland – San Jose, CA	2.6%	1.1%	1.6%	0.5%	1.6%	*	1.0%	0.2%	*
Johnstown – Altoona, PA	0.2%	1.0%	1.4%	0.9%	0.4%	2.6%	1.7%	0.4%	*
Top 10 Sum	20.1%	84.5%	82.5%	41.3%	44.1%	59.5%	59.7%	39.3%	18.0%
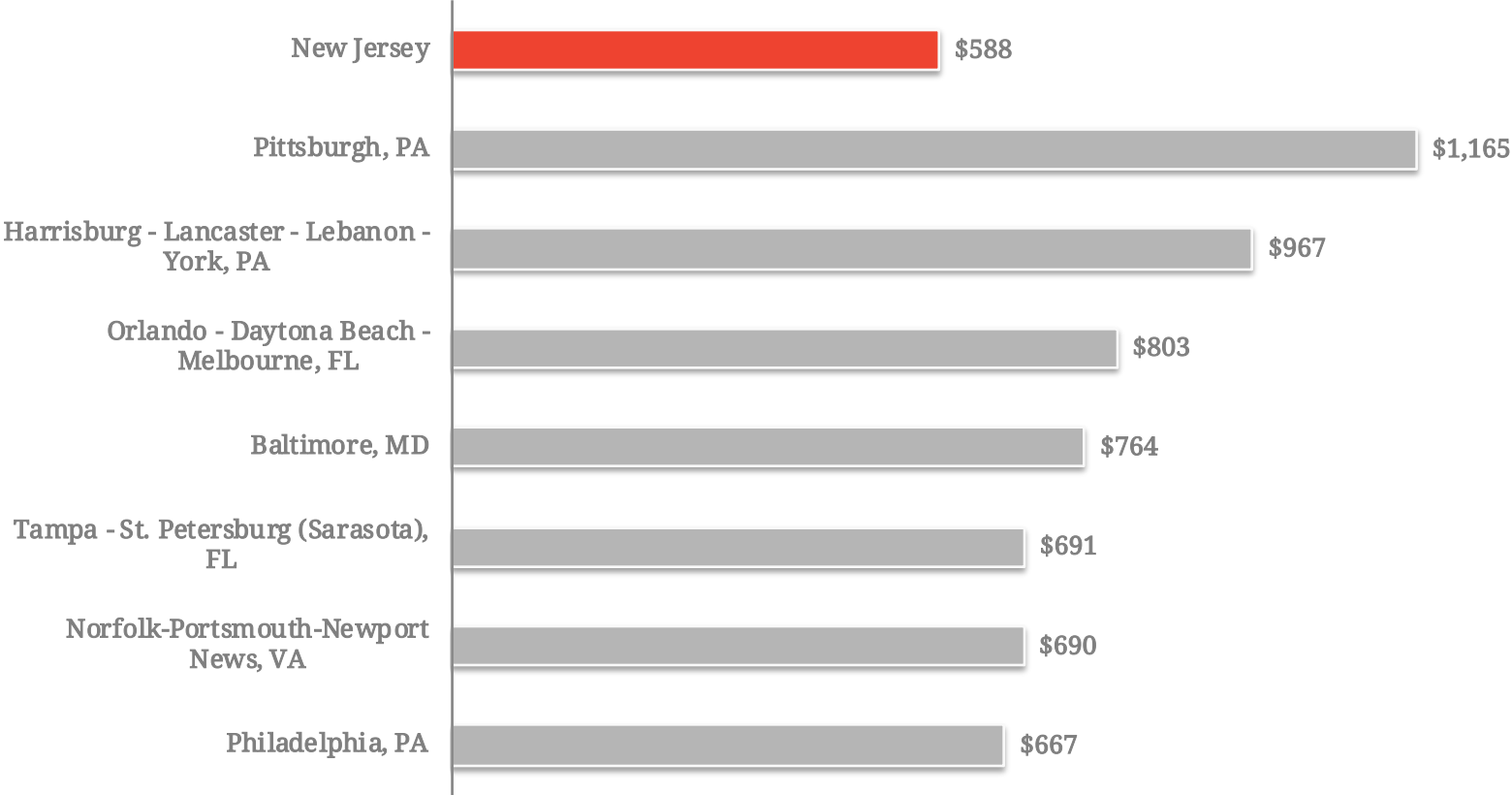
48

New Jersey Avg. Party per Stay Spending by Origin DMA

Origin DMA	Spending
New Jersey	$588
Pittsburgh, PA	$1,165
Harrisburg - Lancaster - Lebanon - York, PA	$967
Orlando - Daytona Beach - Melbourne, FL	$803
Baltimore, MD	$764
Tampa - St. Petersburg (Sarasota), FL	$691
Norfolk-Portsmouth-Newport News, VA	$690
Philadelphia, PA	$667

Chart 29 • Segment: 2018-2020 Overnight Leisure Stays ($) • New Jersey n = 2,485 household count

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

Origin DMA	Spending
New Jersey	$588
Wilkes Barre-Scranton, PA	$646
Raleigh - Durham, NC	$644
New York, NY	$512
Boston, MA	$460
Washington, DC	$453
Hartford & New Haven, CT	$364
Albany - Schnectady - Troy, NY	$331
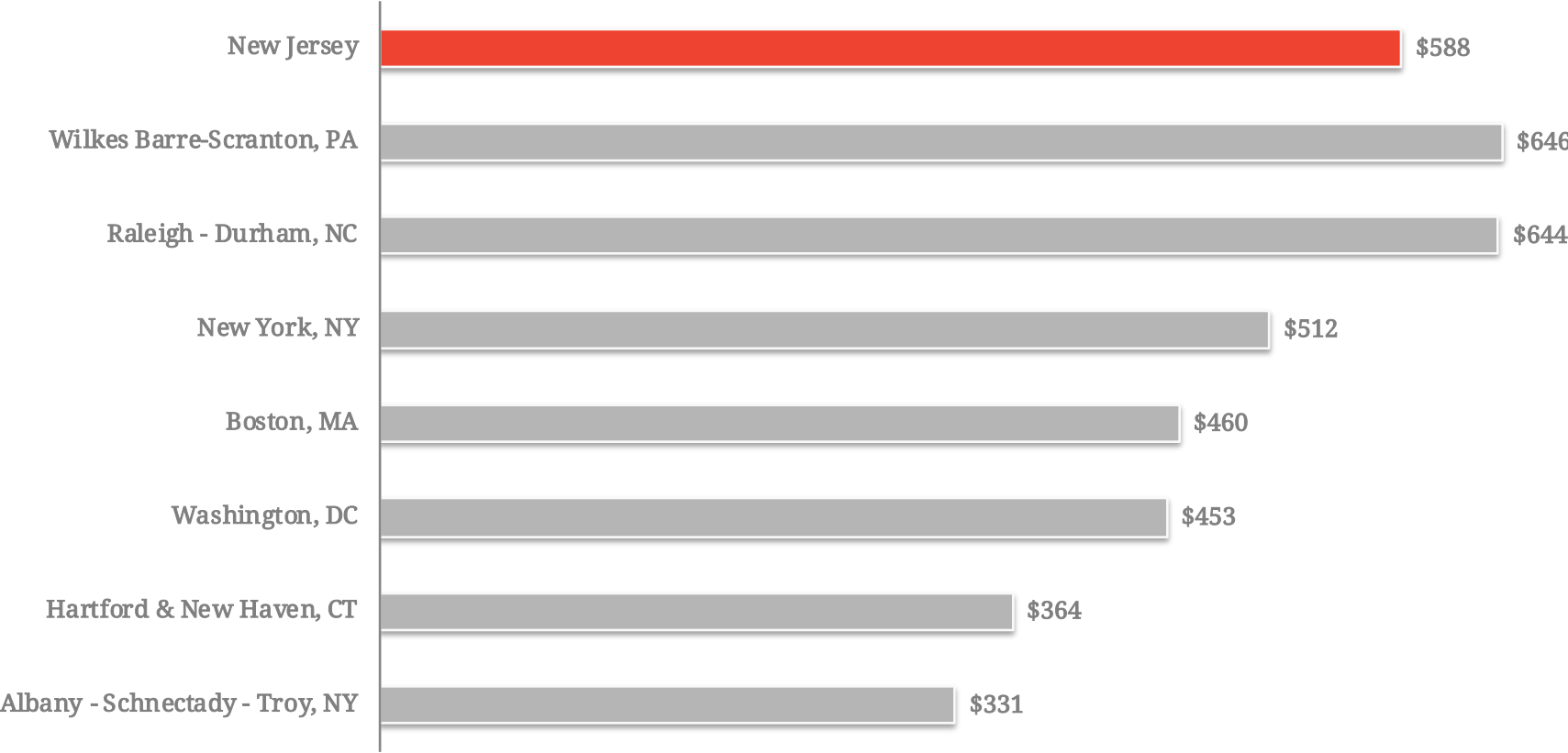
Chart 29 • Segment: 2018-2020 Overnight Leisure Stays ($) • New Jersey n = 2,485 household count

New Jersey Origin DMA Comparison

■ Stays Based   ■ Stay-Dollars Based

DMA	Stays Based	Stay-Dollars Based
New York, NY	35.4	31.4
Philadelphia, PA	21.1	25.4
Washington, DC (Hagerstown, MD)	4.2	3.6
Baltimore, MD	3.3	3.8
Boston, MA (Manchester, NH)	2.9	2.2
Orlando - Daytona Beach - Melbourne, FL	2.7	3.0
Harrisburg - Lancaster - Lebanon - York, PA	1.6	2.4
Norfolk - Portsmouth - Newport News, VA	1.3	1.4
Wilkes Barre - Scranton, PA	1.3	1.7
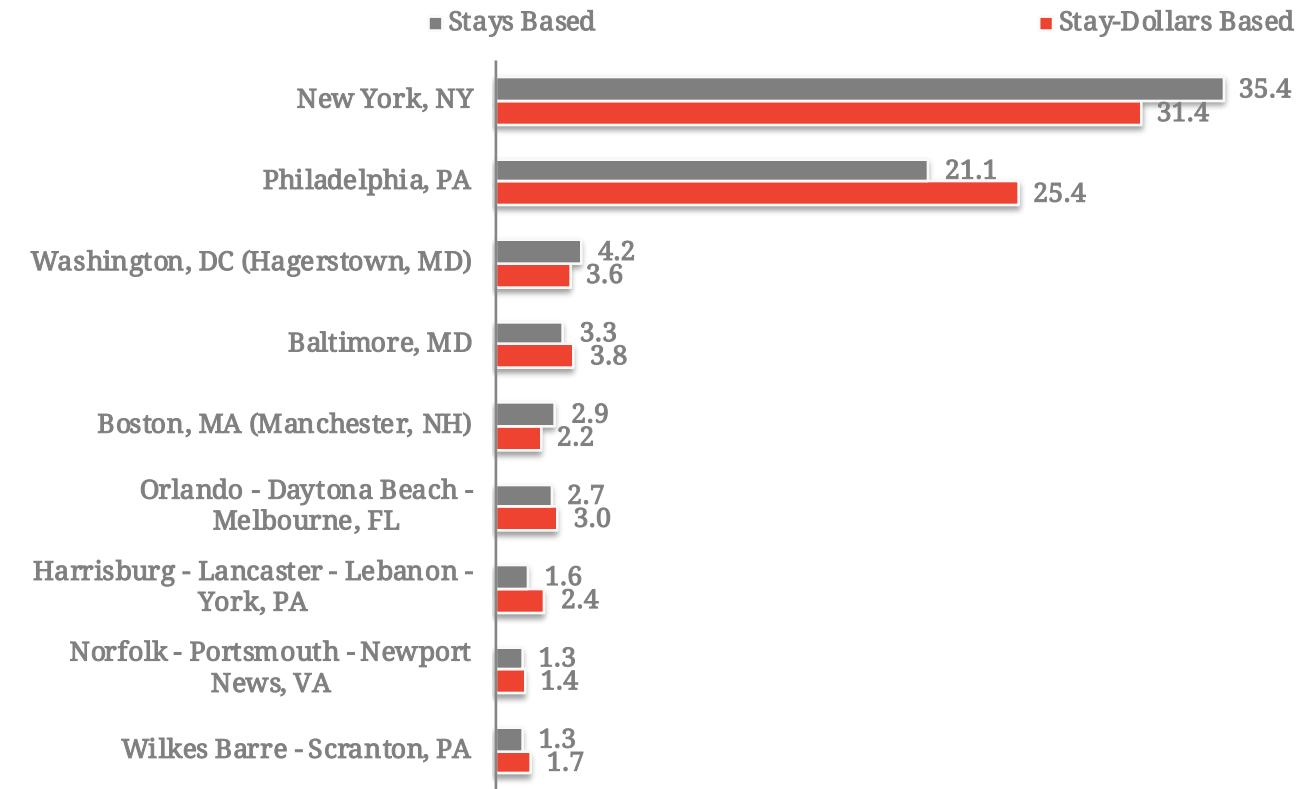
Chart 27 • Segment: 2018-2020 Overnight Leisure (%) • New Jersey n = 2,845 household count

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

■ Air   ■ Auto   ■ Other

Region	Air	Auto	Other
U.S.	10	87	4
New Jersey	4	90	5
NJ w/o Atl City	4	93	2
Comp Set	6	86	7
New York	11	73	15
Pennsylvania	4	89	7
Maryland	9	86	5
Virginia	3	95	2
North Carolina	5	93	3

Chart 28 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 486 household count

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

Legend: ■ 100 miles or less ■ 101-200 miles ■ 201-300 miles ■ 301-500 miles ■ 501+ miles

	100 miles or less	101-200 miles	201-300 miles	301-500 miles	501+ miles
U.S.	26	25	16	16	17
New Jersey	72	15	5	2	6
NJ w/o Atl City	74	14	2	2	7
Comp Set	25	28	21	13	13
New York	25	26	26	10	14
Pennsylvania	35	35	14	6	9
Maryland	28	35	16	6	13
Virginia	18	28	26	18	12
North Carolina	22	20	22	21	15

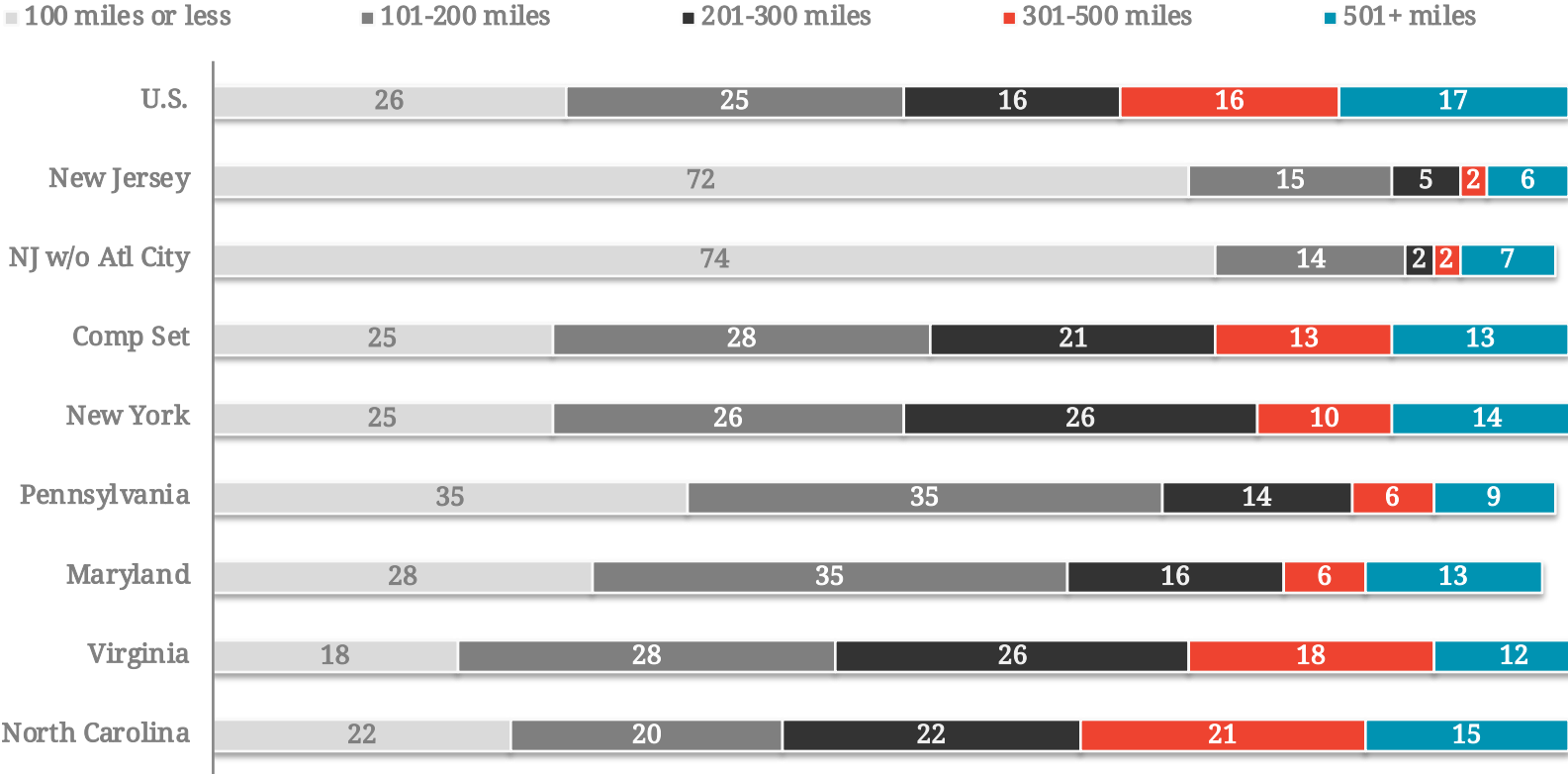Chart 29 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 362 household count

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

Legend: ■ 300 miles or less　　■ 301-700 miles　　■ 701-1,000 miles　　■ 1,001+ miles

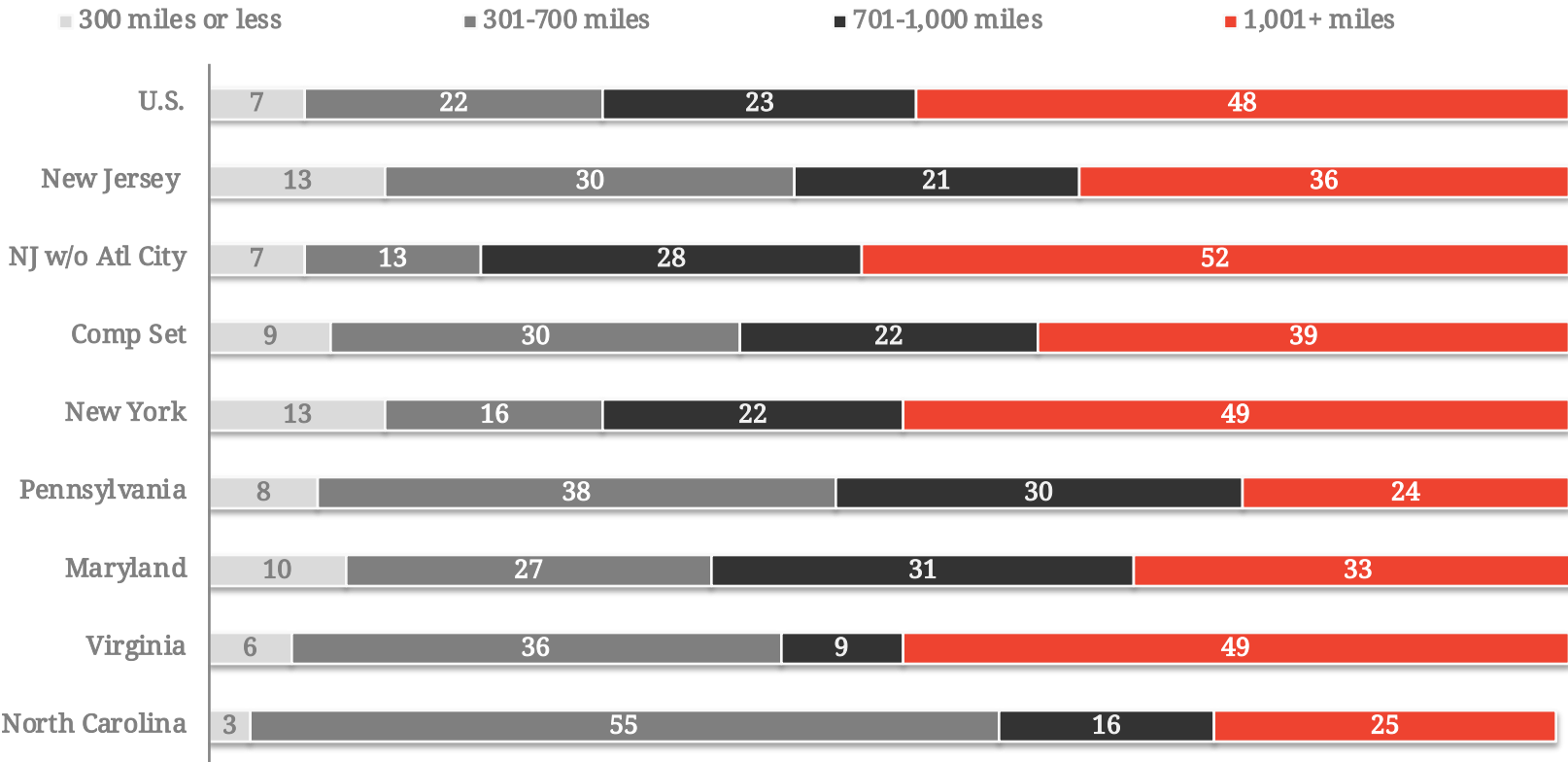| Region	300 miles or less	301-700 miles	701-1,000 miles	1,001+ miles
U.S.	7	22	23	48
New Jersey	13	30	21	36
NJ w/o Atl City	7	13	28	52
Comp Set	9	30	22	39
New York	13	16	22	49
Pennsylvania	8	38	30	24
Maryland	10	27	31	33
Virginia	6	36	9	49
North Carolina	3	55	16	25

Chart 30 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 90 household count

New Jersey Month Trip Started

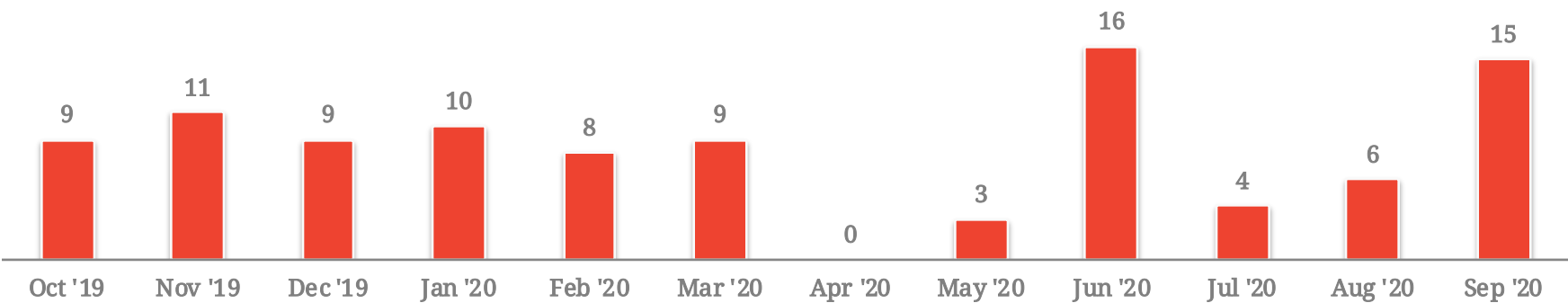| Oct '19	Nov '19	Dec '19	Jan '20	Feb '20	Mar '20	Apr '20	May '20	Jun '20	Jul '20	Aug '20	Sep '20
9	11	9	10	8	9	0	3	16	4	6	15

Chart 31 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 486 household count

55

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

Legend: ■ Fourth Quarter '19   ■ First Quarter '20   ■ Second Quarter '20   ■ Third Quarter '20

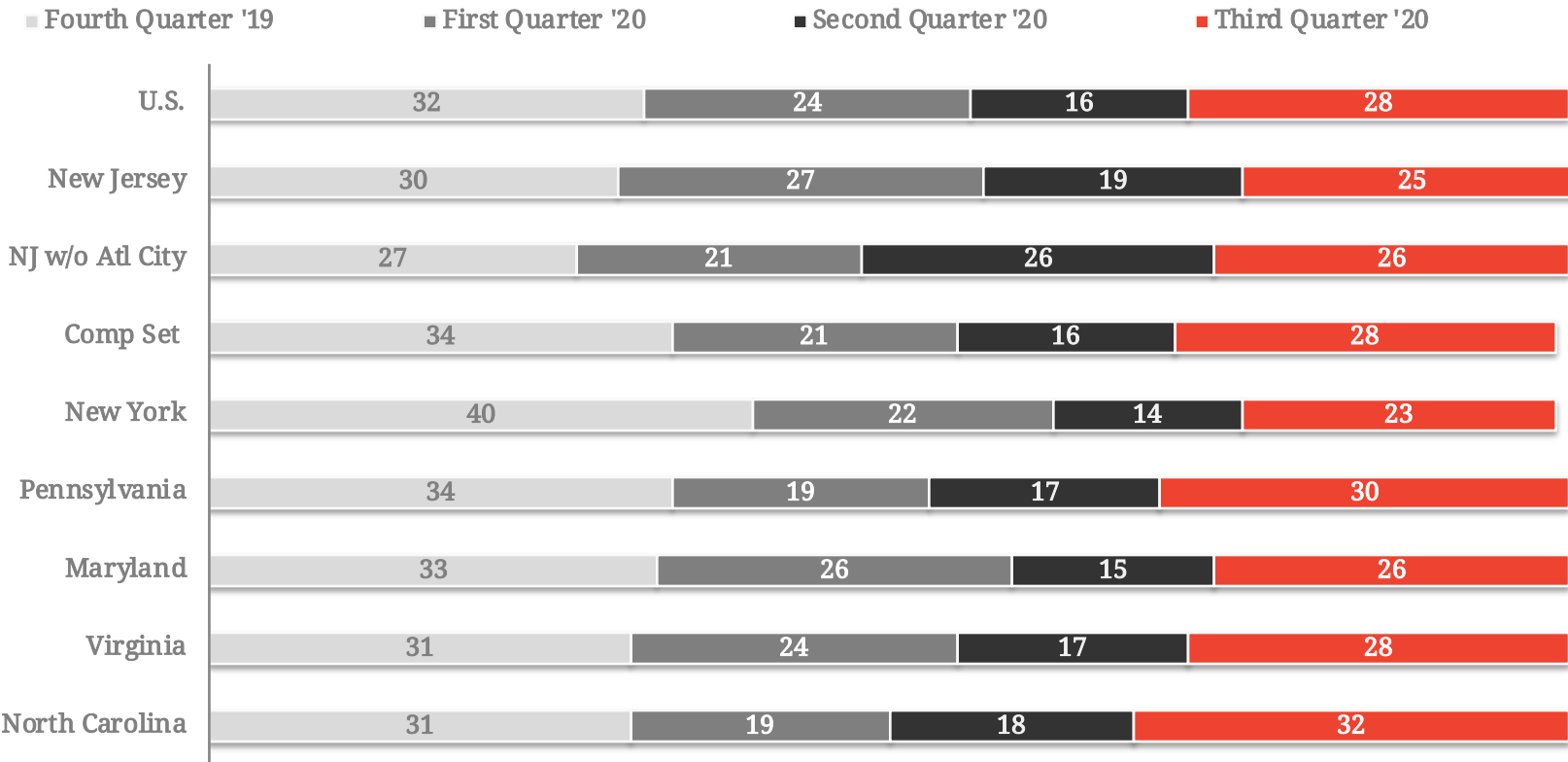|	Fourth Quarter '19	First Quarter '20	Second Quarter '20	Third Quarter '20
U.S.	32	24	16	28
New Jersey	30	27	19	25
NJ w/o Atl City	27	21	26	26
Comp Set	34	21	16	28
New York	40	22	14	23
Pennsylvania	34	19	17	30
Maryland	33	26	15	26
Virginia	31	24	17	28
North Carolina	31	19	18	32

Chart 32 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 486 household count
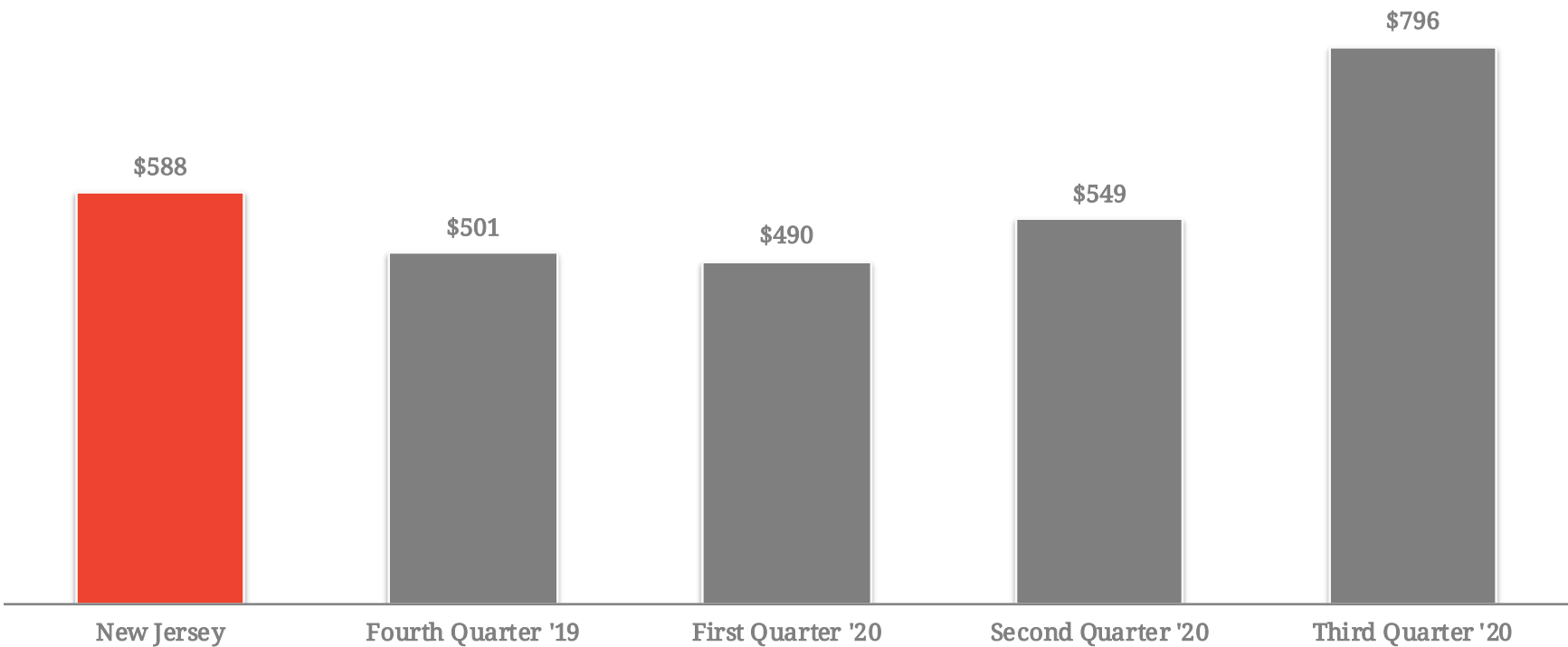
56

New Jersey Avg. Party per Stay Spending by Quarter

Chart 33 • Segment: 2018-2020 Overnight Leisure Stays ($) • New Jersey n = 2,511 household count

New Jersey Trip Timing Comparison by Quarter

■ Stays Based   ■ Stay-Dollars Based

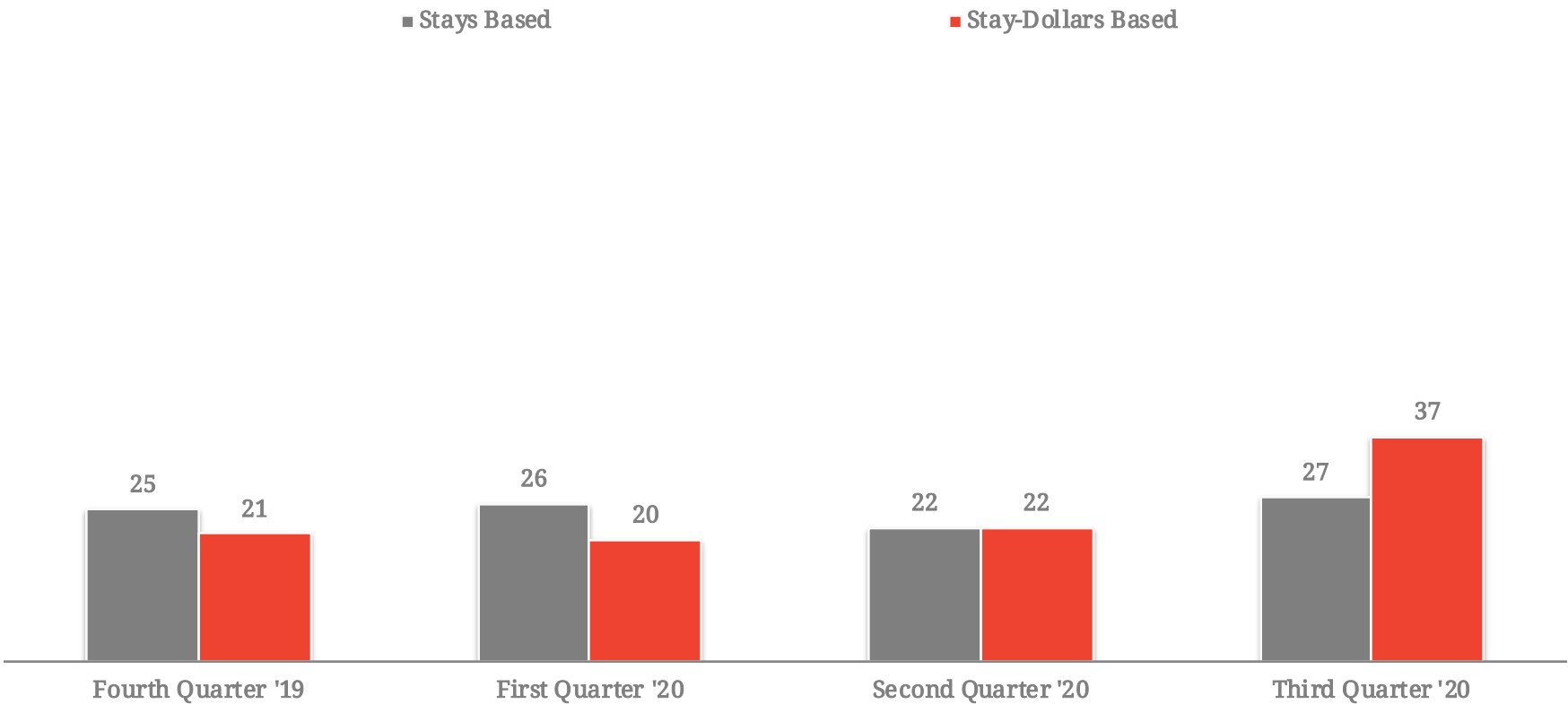|	Fourth Quarter '19	First Quarter '20	Second Quarter '20	Third Quarter '20
Stays Based	25	26	22	27
Stay-Dollars Based	21	20	22	37

Chart 34 • Segment: 2018-2020 Overnight Leisure (%) • New Jersey n = 2,876 household count

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

■ Winter   ■ Spring   ■ Summer   ■ Fall

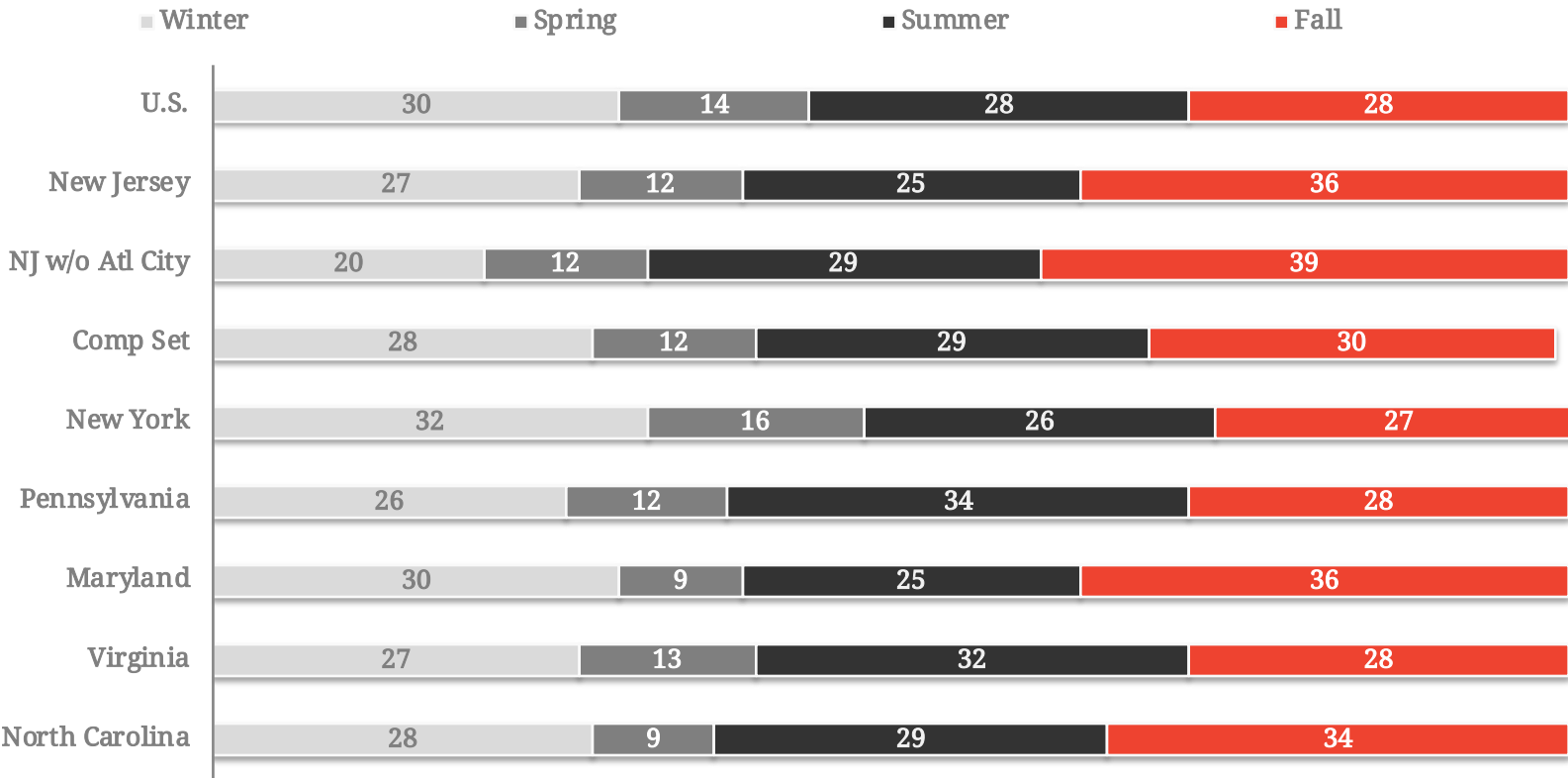| Region	Winter	Spring	Summer	Fall
U.S.	30	14	28	28
New Jersey	27	12	25	36
NJ w/o Atl City	20	12	29	39
Comp Set	28	12	29	30
New York	32	16	26	27
Pennsylvania	26	12	34	28
Maryland	30	9	25	36
Virginia	27	13	32	28
North Carolina	28	9	29	34

Chart 35 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 486 household count
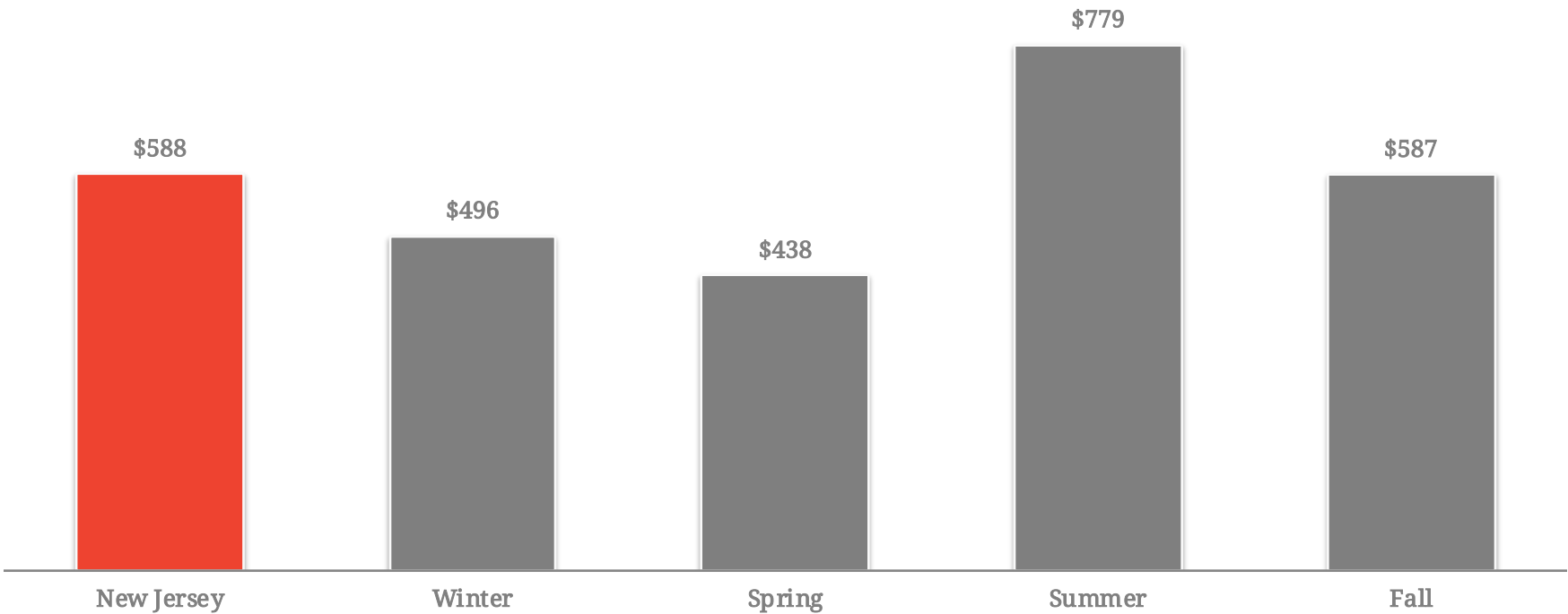
New Jersey Avg. Party per Stay Spending by Season

Chart 36 • Segment: 2018-2020 Overnight Leisure Stays ($) • New Jersey n = 2,511 household count

New Jersey Trip Timing Comparison by Season

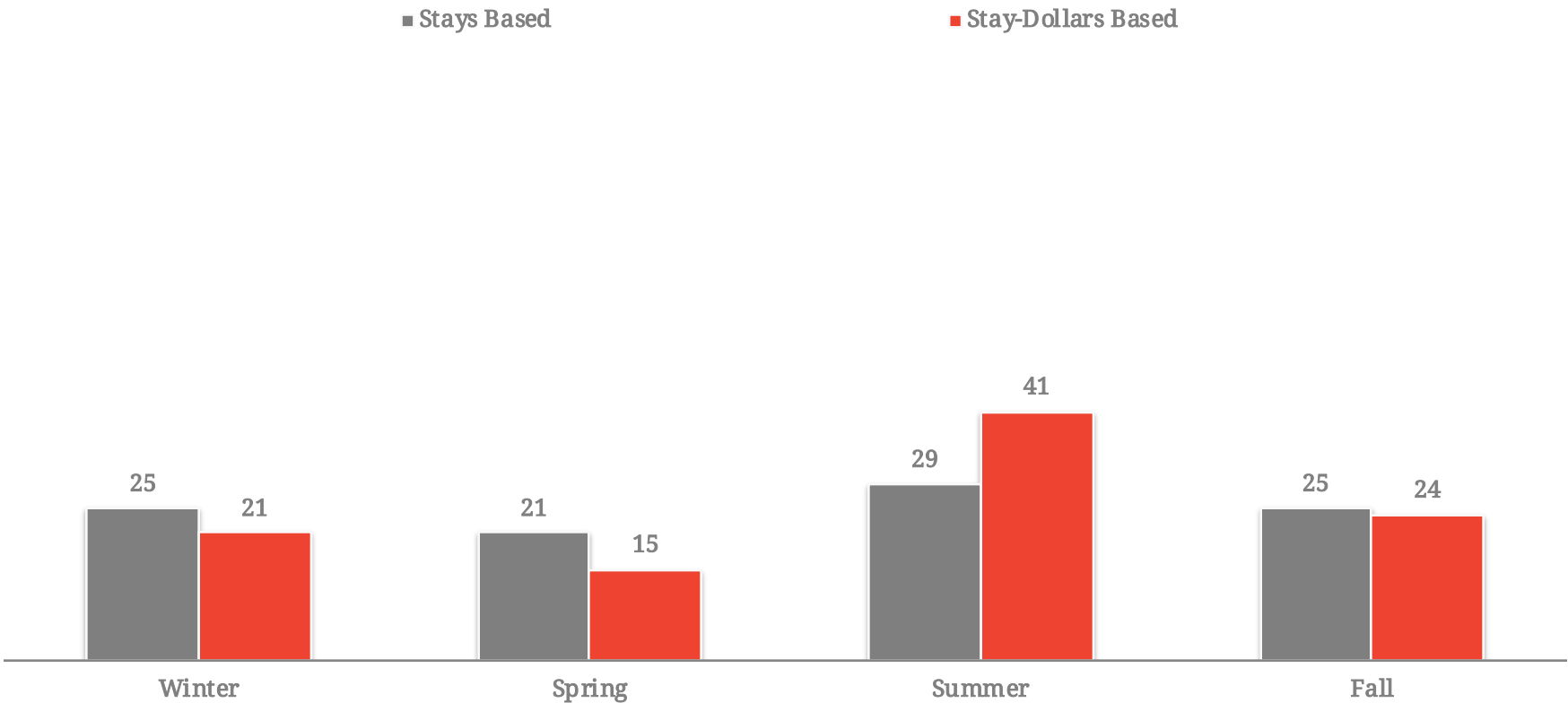■ Stays Based   ■ Stay-Dollars Based

Chart 37 • Segment: 2018-2020 Overnight Leisure (%) • New Jersey n = 2,876 household count

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

Legend:
- Getaway Weekend (Overnight)
- General Vacation (overnight)
- Visit Friends/Relatives
- Special Events
- Convention/Show/Conference
- Medical/Health Care
- Seminar/Class/Training
- Other Personal/Leisure

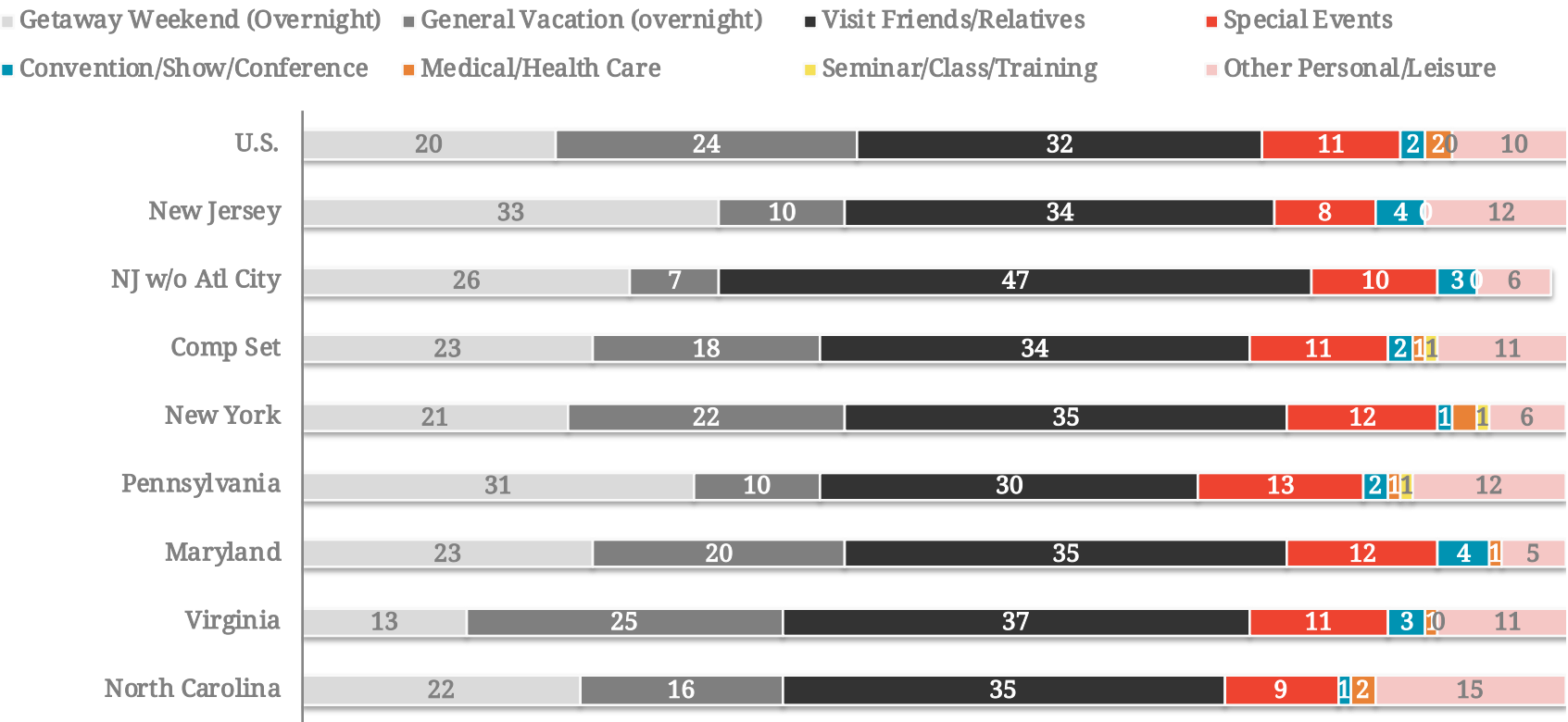|	Getaway Weekend	General Vacation	Visit Friends/Relatives	Special Events	Convention/Show/Conference	Medical/Health Care	Seminar/Class/Training	Other Personal/Leisure
U.S.	20	24	32	11	2	2	0	10
New Jersey	33	10	34	8	4	0		12
NJ w/o Atl City	26	7	47	10	3	0		6
Comp Set	23	18	34	11	2	1	1	11
New York	21	22	35	12	1	1	1	6
Pennsylvania	31	10	30	13	2	1	1	12
Maryland	23	20	35	12	4		1	5
Virginia	13	25	37	11	3	0		11
North Carolina	22	16	35	9	1	2		15

Chart 38 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 486 household count
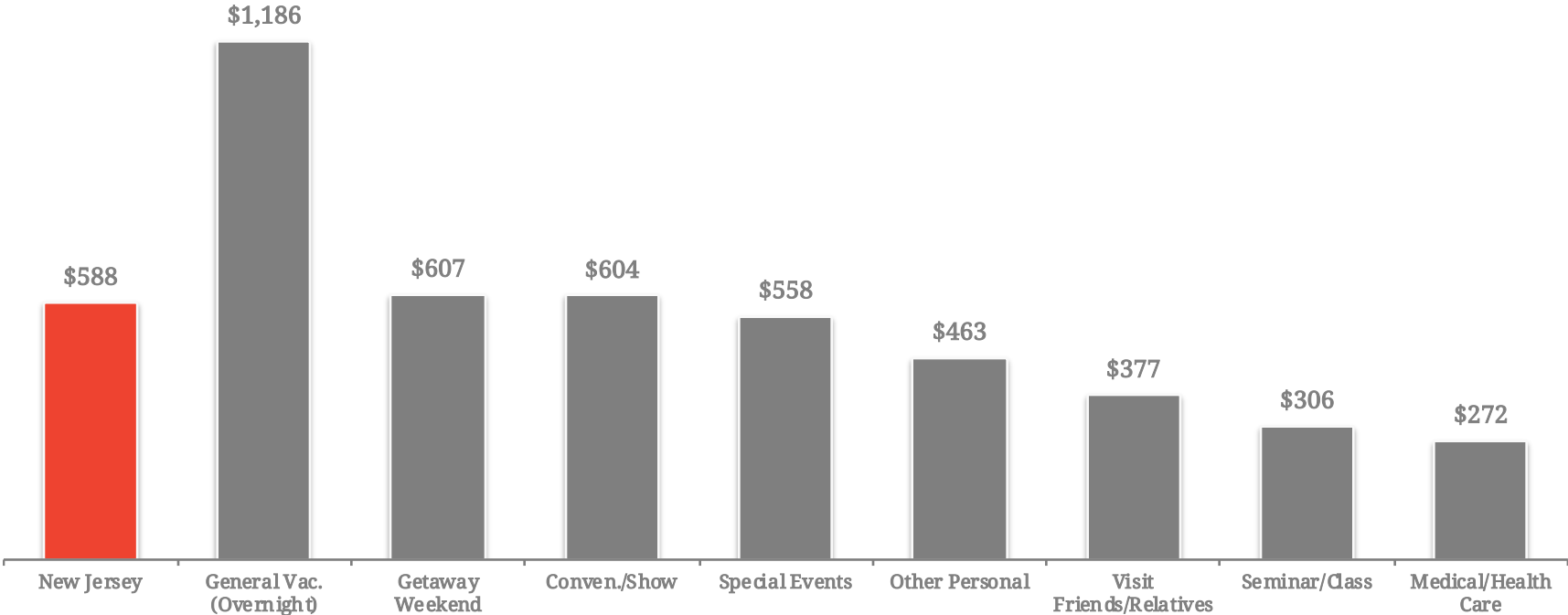
New Jersey Avg. Party per Stay Spending by Purpose of Stay

Chart 39 • Segment: 2018-2020 Overnight Leisure Stays ($) • New Jersey n = 2,511 household count
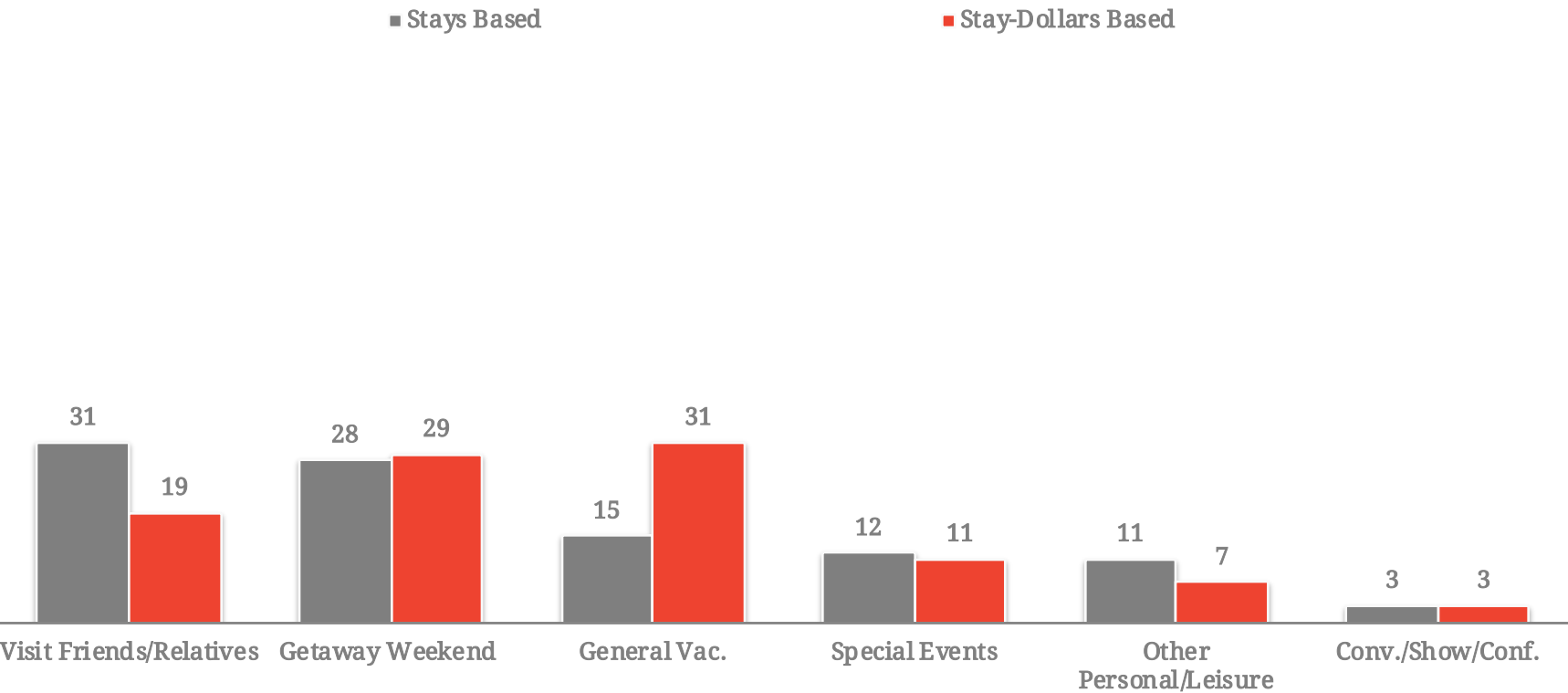
New Jersey Purpose of Stay Comparison

■ Stays Based   ■ Stay-Dollars Based

Purpose	Stays Based	Stay-Dollars Based
Visit Friends/Relatives	31	19
Getaway Weekend	28	29
General Vac.	15	31
Special Events	12	11
Other Personal/Leisure	11	7
Conv./Show/Conf.	3	3

Chart 40 • Segment: 2018-2020 Overnight Leisure (%) • New Jersey n = 2,876 household count

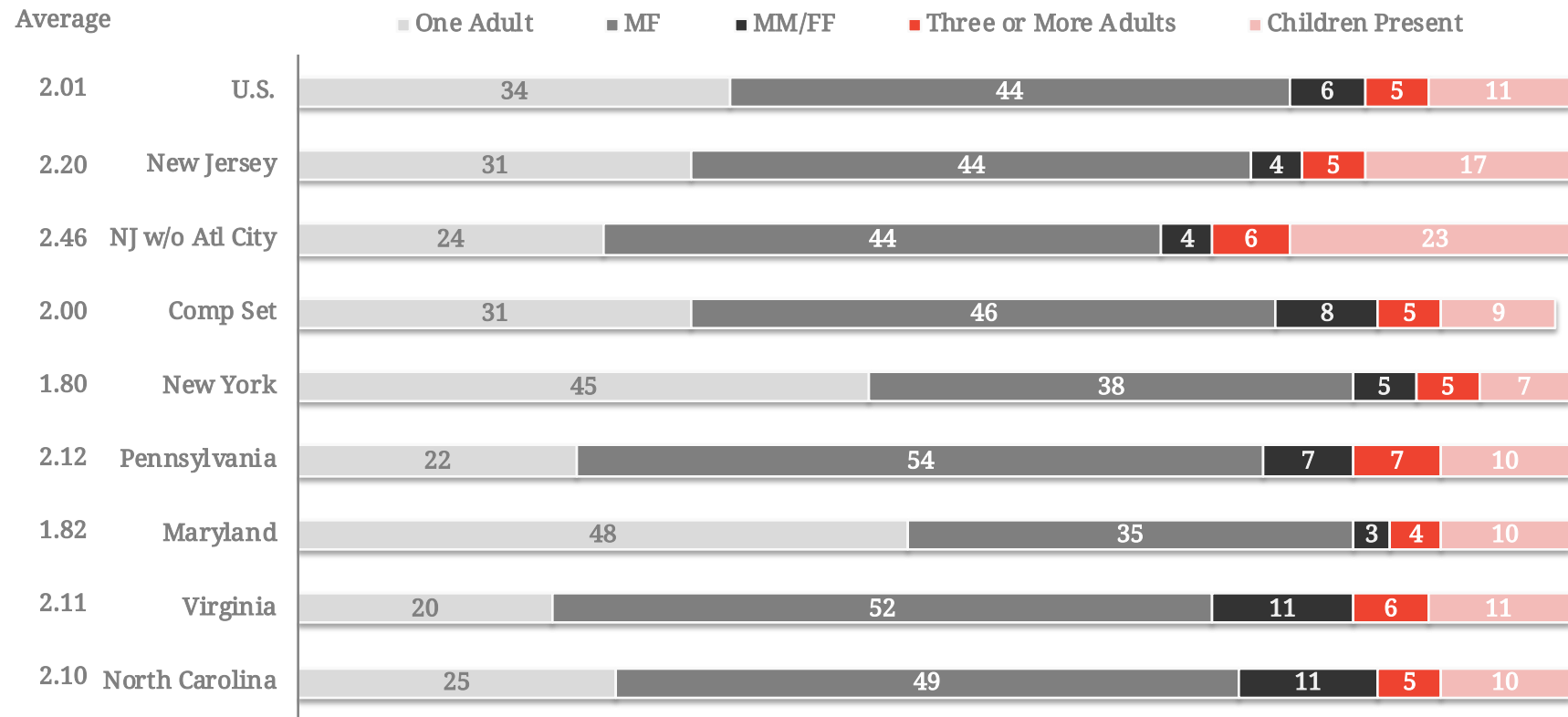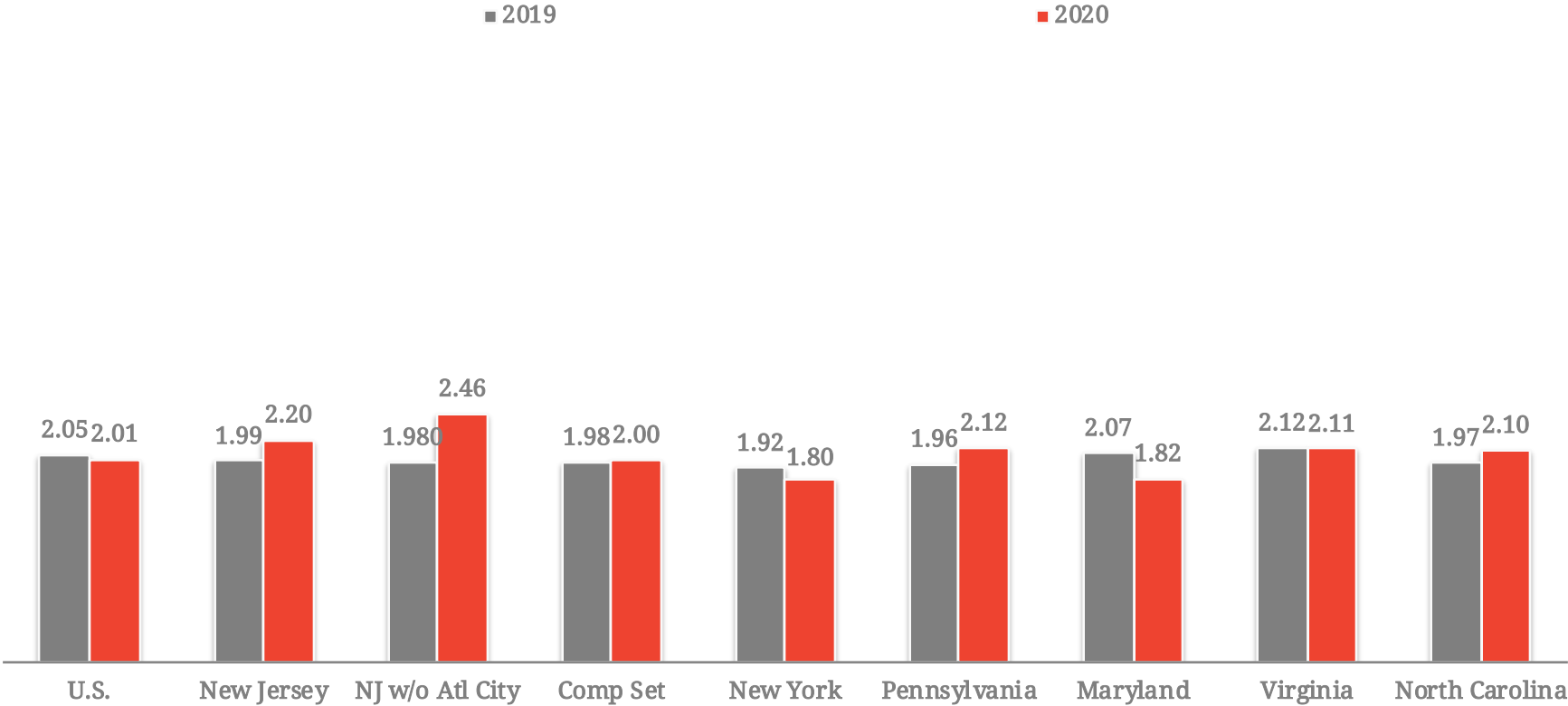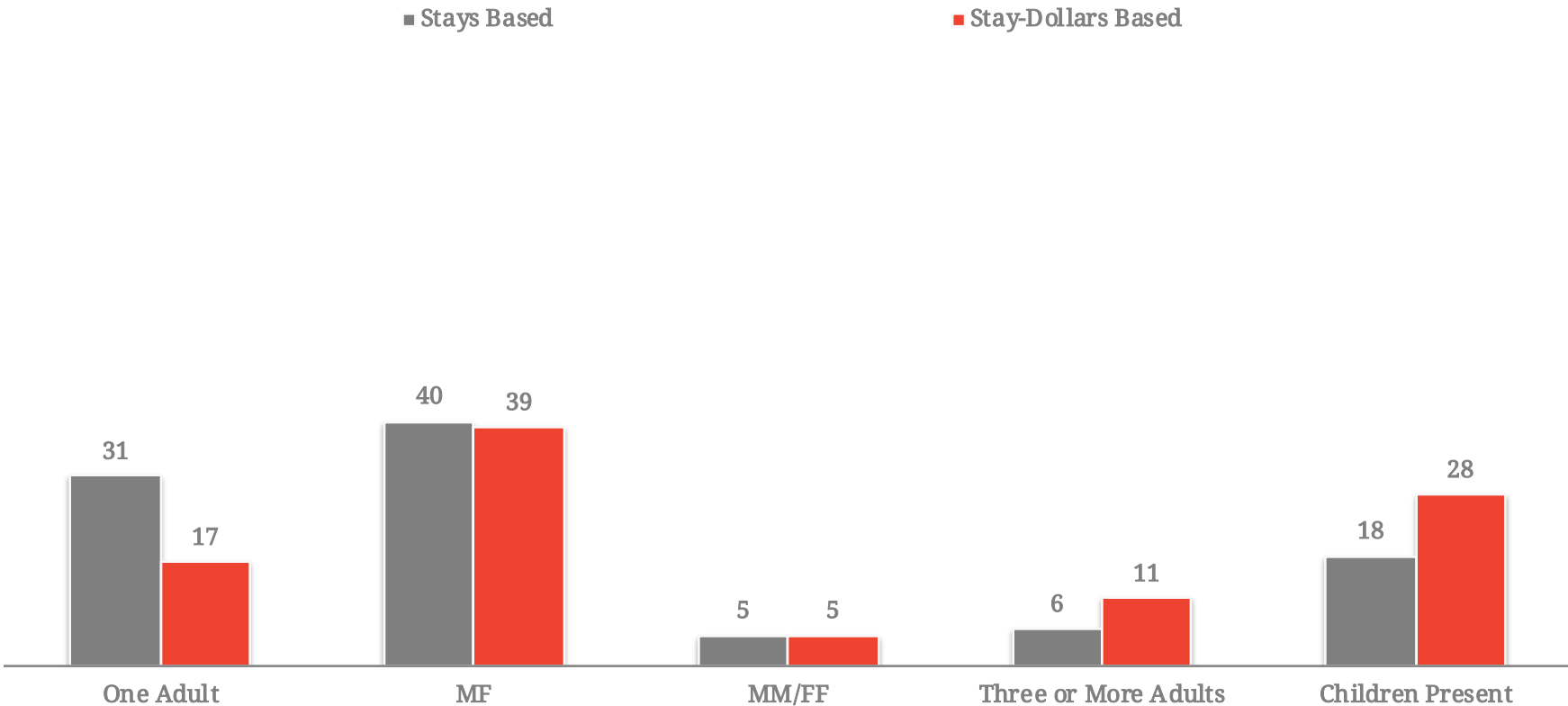64

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

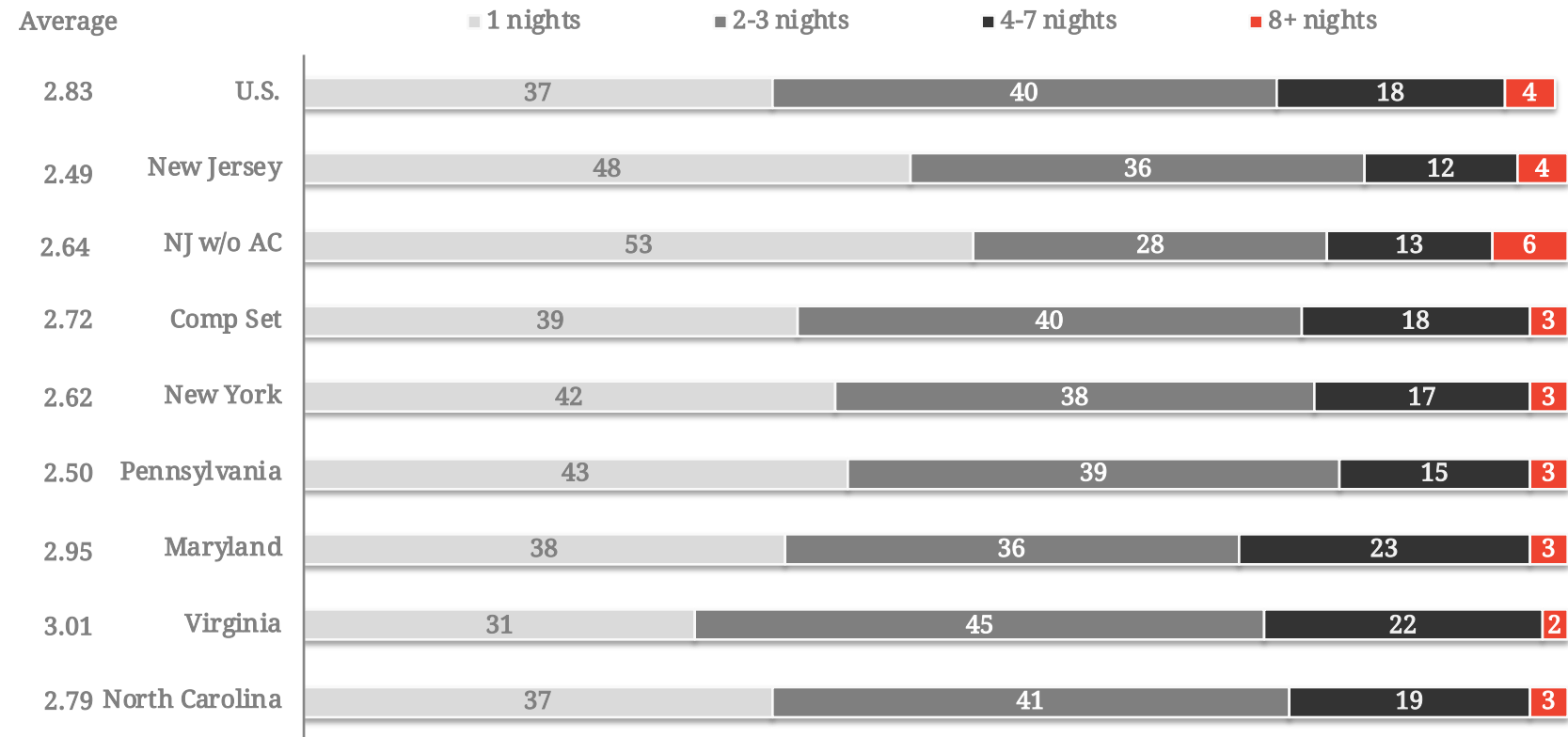| Average		One Adult	MF	MM/FF	Three or More Adults	Children Present
2.01	U.S.	34	44	6	5	11
2.20	New Jersey	31	44	4	5	17
2.46	NJ w/o Atl City	24	44	4	6	23
2.00	Comp Set	31	46	8	5	9
1.80	New York	45	38	5	5	7
2.12	Pennsylvania	22	54	7	7	10
1.82	Maryland	48	35	3	4	10
2.11	Virginia	20	52	11	6	11
2.10	North Carolina	25	49	11	5	10

Chart 41 • Segment: 2020 Overnight Leisure Stays (%) • New Jersey n = 486 household count

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

■ 2019 ■ 2020

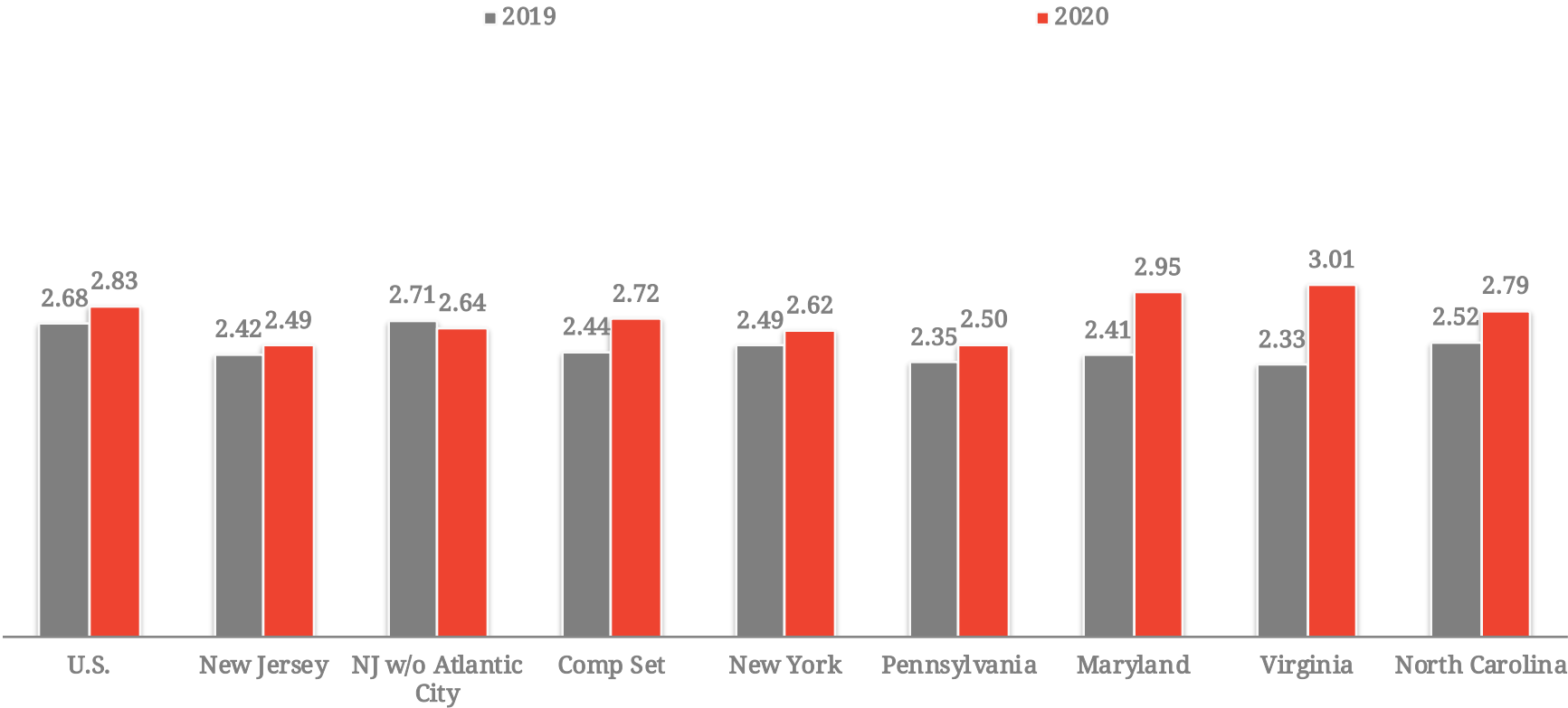| Category	2019	2020
U.S.	2.05	2.01
New Jersey	1.99	2.20
NJ w/o Atl City	1.980	2.46
Comp Set	1.98	2.00
New York	1.92	1.80
Pennsylvania	1.96	2.12
Maryland	2.07	1.82
Virginia	2.12	2.11
North Carolina	1.97	2.10

Chart 42 • Segment: 2019/2020 Overnight Leisure Stays • New Jersey n = 486 household count
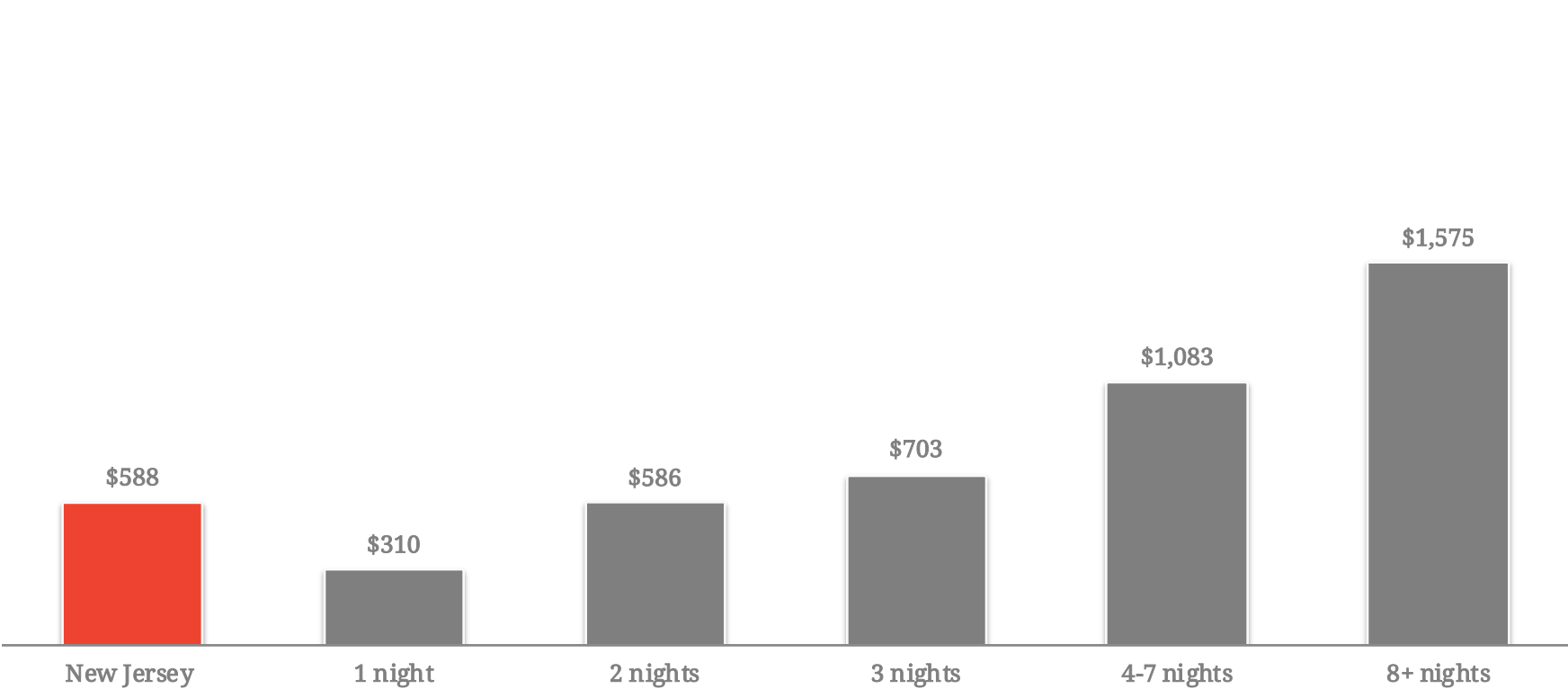
New Jersey Avg. Party per Stay Spending by Travel Party Composition
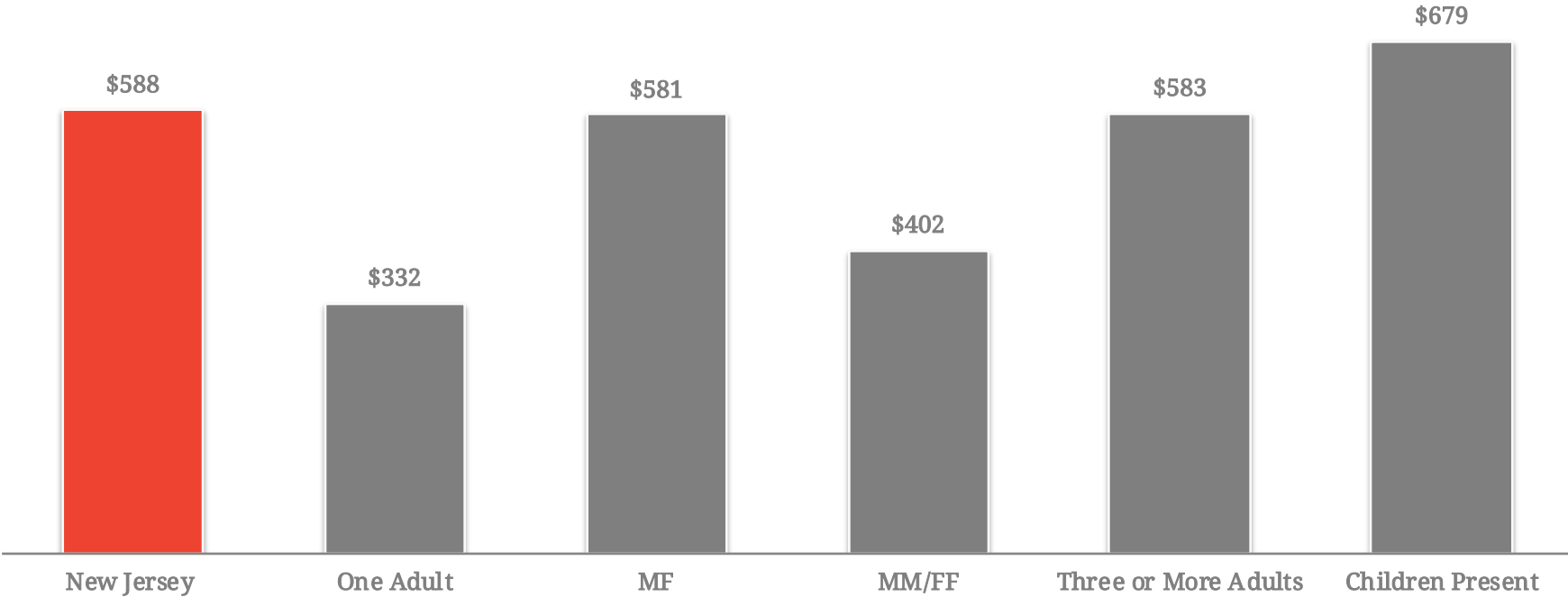
Chart 43 • Segment: 2018-2020 Overnight Leisure Stays ($) • New Jersey n = 2,876 household count

New Jersey Travel Party Comparison

■ Stays Based   ■ Stay-Dollars Based

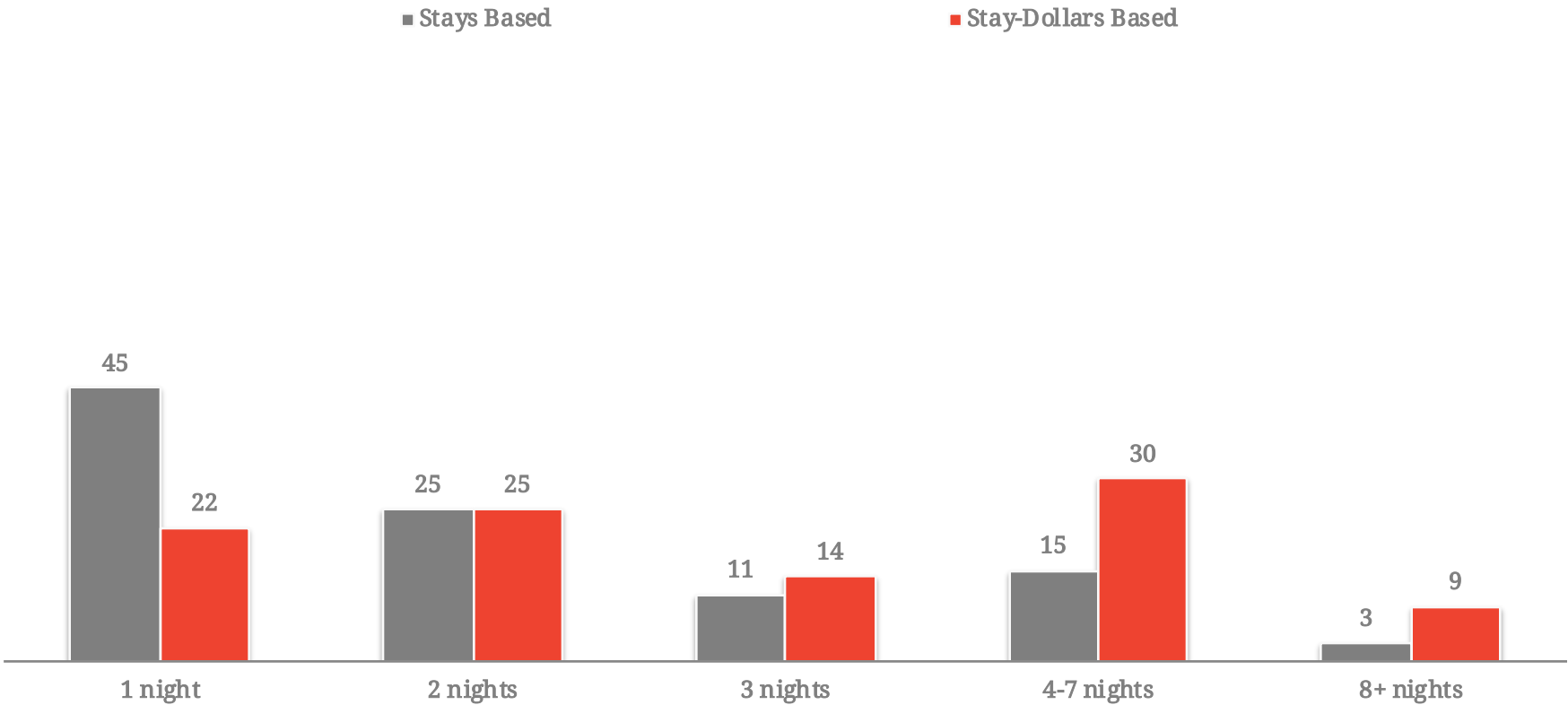|	One Adult	MF	MM/FF	Three or More Adults	Children Present
Stays Based	31	40	5	6	18
Stay-Dollars Based	17	39	5	11	28

Chart 44 • Segment: 2018-2020 Overnight Leisure (%) • New Jersey n = 2,876 household count

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

Average		1 nights	2-3 nights	4-7 nights	8+ nights
2.83	U.S.	37	40	18	4
2.49	New Jersey	48	36	12	4
2.64	NJ w/o AC	53	28	13	6
2.72	Comp Set	39	40	18	3
2.62	New York	42	38	17	3
2.50	Pennsylvania	43	39	15	3
2.95	Maryland	38	36	23	3
3.01	Virginia	31	45	22	2
2.79	North Carolina	37	41	19	3

Chart 45 • Segment: 2020 Overnight Leisure Stays (%) • New Jersey n = 486 household count

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

■ 2019   ■ 2020

	2019	2020
U.S.	2.68	2.83
New Jersey	2.42	2.49
NJ w/o Atlantic City	2.71	2.64
Comp Set	2.44	2.72
New York	2.49	2.62
Pennsylvania	2.35	2.50
Maryland	2.41	2.95
Virginia	2.33	3.01
North Carolina	2.52	2.79

Chart 46 • Segment: 2019/2020 Overnight Leisure Stays • New Jersey n = 486 household count

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New Jersey Avg. Party per Stay Spending by Stay Length

Chart 47 • Segment: 2018-2020 Overnight Leisure Stays ($) • New Jersey n = 2,511 household count

New Jersey	1 night	2 nights	3 nights	4-7 nights	8+ nights
$588	$310	$586	$703	$1,083	$1,575

New Jersey Stay Length Comparison

■ Stays Based   ■ Stay-Dollars Based

	1 night	2 nights	3 nights	4-7 nights	8+ nights
Stays Based	45	25	11	15	3
Stay-Dollars Based	22	25	14	30	9

Chart 48 • Segment: 2018-2020 Overnight Leisure (%) • New Jersey n = 2,876 household count

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

Average

	Transportation	Food	Room	Shopping	Entertainment	Miscellaneous
$125.0 U.S.	26	27	22	11	10	3
$111.5 New Jersey	19	30	22	8	17	3
$95.2 NJ w/o Atl City	23	34	23	8	9	1
$120.0 Comp Set	24	28	23	11	10	3
$155.2 New York	25	26	21	11	12	4
$108.6 Pennsylvania	22	31	22	13	8	2
$97.2 Maryland	27	32	25	8	6	2
$109.1 Virginia	25	27	29	8	7	3
$105.6 North Carolina	22	30	22	11	11	3
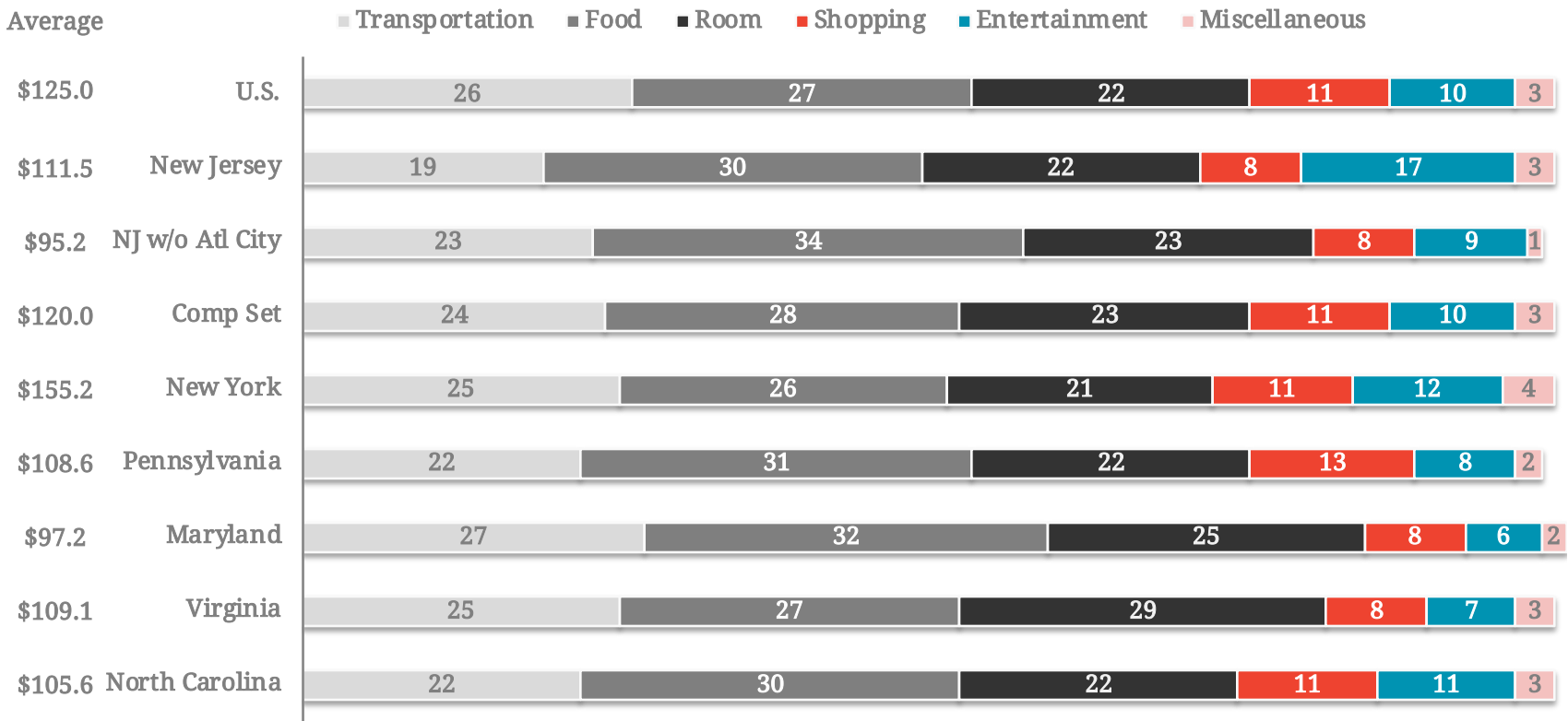
Chart 45 • Segment: 2020 Overnight Leisure Person-Days (%) • New Jersey n = 412 household count

New Jersey Activity Participation

Attraction 33%
- Gambling (24%)
- Night Life (7%)
- Amateur Sports (3%)
- Zoo/Aquarium (2%)
- Professional Sports Event (2%)
- Theme/Water Park (1%)
- Show: Boat, Car, Home (1%)

Family/ Life Events 31%
- Visit Friends/ Relatives (21%)
- Holiday Celebration (8%)
- Other Personal Celebrations (4%)
- Funeral/ Memorial (2%)
- Wedding (1%)
- Reunion/ Graduation (1%)

Culture 14%
- Live Music (4%)
- Touring/Sightseeing (4%)
- Movies (3%)
- Historic Sites (2%)
- Festival/ Fairs (2%)
- Theater/Dance (2%)
- Museum, Art Exhibits, etc. (2%)

Libation and Culinary 22%
- Culinary/ Dining Experience (20%)
- Winery/ Distillery/ Brewery (3%)

Outdoor Sports 8%
- Biking (3%)
- Hiking (3%)
- Water Sports (1%)
- Fishing (1%)
- Boating/ Sailing (1%)
- Golfing (1%)

Nature 24%
- Beach/ Waterfront (23%)
- Parks: National/ State (2%)
- Wildlife Viewing (1%)

General 19%
- Shopping (14%)
- Spa (3%)
- Other Activities (2%)
- Religious/ Faith Based Event (1%)
- Medical/Health/Doctor (1%)

Chart 46 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 486 household count

Top Activities at the Destination

ACTIVITY PARTICIPATION

	U.S.	New Jersey	NJ w/o Atl City	New York	Pennsylvania	Maryland	Virginia	North Carolina
Beach/Waterfront	16%	23%	21%	13%	4%	27%	14%	21%
Culinary/Dining Experience	23%	20%	16%	31%	17%	34%	15%	23%
Gambling	7%	24%	1%	11%	3%	5%	3%	10%
Visit Friends/Relatives	30%	21%	28%	34%	25%	33%	29%	31%
Shopping	21%	14%	12%	27%	21%	19%	21%	24%
Live Music	5%	4%	3%	13%	5%	5%	4%	3%
Nightlife	8%	7%	6%	17%	4%	6%	4%	6%
Other Personal Celebrations	2%	4%	5%	4%	1%	3%	2%	2%
Holiday Celebration (Thanksgiving, July 4th etc.)	8%	8%	10%	15%	8%	10%	8%	7%
Theme/Amusement/Water Parks	5%	1%	1%	8%	2%	1%	2%	2%
Historic Sites	10%	2%	3%	19%	13%	7%	19%	20%
Movies	4%	3%	3%	9%	2%	7%	5%	4%
Religious/Faith Based Conference	3%	1%	2%	9%	3%	1%	3%	8%
Touring/Sightseeing	14%	4%	4%	23%	17%	7%	20%	14%
Festivals/Fairs (state, craft etc.)	4%	2%	2%	9%	2%	7%	2%	7%
Biking	3%	3%	4%	7%	2%	2%	3%	6%
Parks (national, state)	11%	2%	3%	16%	10%	6%	10%	12%
Amateur Sports	5%	3%	2%	12%	3%	8%	4%	7%
Museums, Art Exhibits, etc.	6%	2%	2%	17%	7%	4%	9%	10%
Theater/Dance Performance	3%	2%	1%	16%	3%	2%	2%	2%
Zoo/Aquarium	3%	2%	2%	9%	6%	1%	2%	2%
Water Sports	3%	1%	1%	9%	1%	*	2%	2%

Chart 47 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 486 household count

Top Activities at the Destination

	U.S.	New Jersey	NJ w/o Atl City	New York	Pennsylvania	Maryland	Virginia	North Carolina
Wedding	3%	1%	1%	8%	2%	1%	2%	2%
Funeral/Memorial	3%	2%	3%	10%	3%	1%	3%	4%
Hiking	9%	3%	3%	11%	3%	4%	12%	12%
Reunion/Graduation	2%	1%	2%	7%	4%	*	2%	3%
Wildlife Viewing (birds, whales, etc.)	5%	1%	1%	9%	2%	6%	3%	5%
Winery/Distillery/Brewery Tours	4%	3%	5%	11%	11%	2%	5%	9%
Professional Sports Event	3%	2%	2%	9%	2%	3%	1%	3%
Business/Work	2%	*	*	7%	1%	*	2%	8%
Extreme/Adventure Sports	1%	*	*	8%	1%	*	1%	6%
Golfing	3%	1%	1%	8%	1%	1%	3%	2%
Real Estate (buy/sell)	1%	*	*	8%	1%	1%%	3%	2%
Camping	4%	*	*	8%	4%	1%	2%	9%
Boating/Sailing	4%	1%	1%	9%	1%	8	3%	6%
Fishing	4%	1%	1%	10%	1%	2%	2%	9%
Medical/Health/Doctor Visit	2%	1%	2%	7%	1%	3%	1%	4%
Show: Boat, Car, Home	3%	1%	1%	10%	1%	2%	3%	6%
Spa	2%	3%	3%	8%	1%	*	2%	2%
Tennis	1%	*	*	7%	1%	*	1%	1%
Eco/Sustainable Travel	1%	*	*	8%	*	*	2%	7%
Service/Volunteerism/Charity	1%	1%	2%	6%	1%	*	1%	1%
Snow/Winter Sports	2%	*	*	8%	1%	*	4%	1%
Hunting	1%	*	*	7%	1%	1%	1%	1%

Chart 48 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 486 household count

New Jersey Activity Index

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

U.S. Activity Participation = 100

Activity	Index
Gambling	322
Other Personal Celebrations	174
Spa	162
Beach/ Waterfront	144
Service/ Volunteer	129
Biking	103
Holiday Celebration	99
Nightlife	96
Culinary	88
Winery/ Brewery	84
Theater/ Dance	75
Live Music	74
Funeral/ Memorial	72

Chart 49 • Segment: 2020 Overnight Leisure Person-Stays • New Jersey n = 486 household count

New Jersey Activity Index (cont.)

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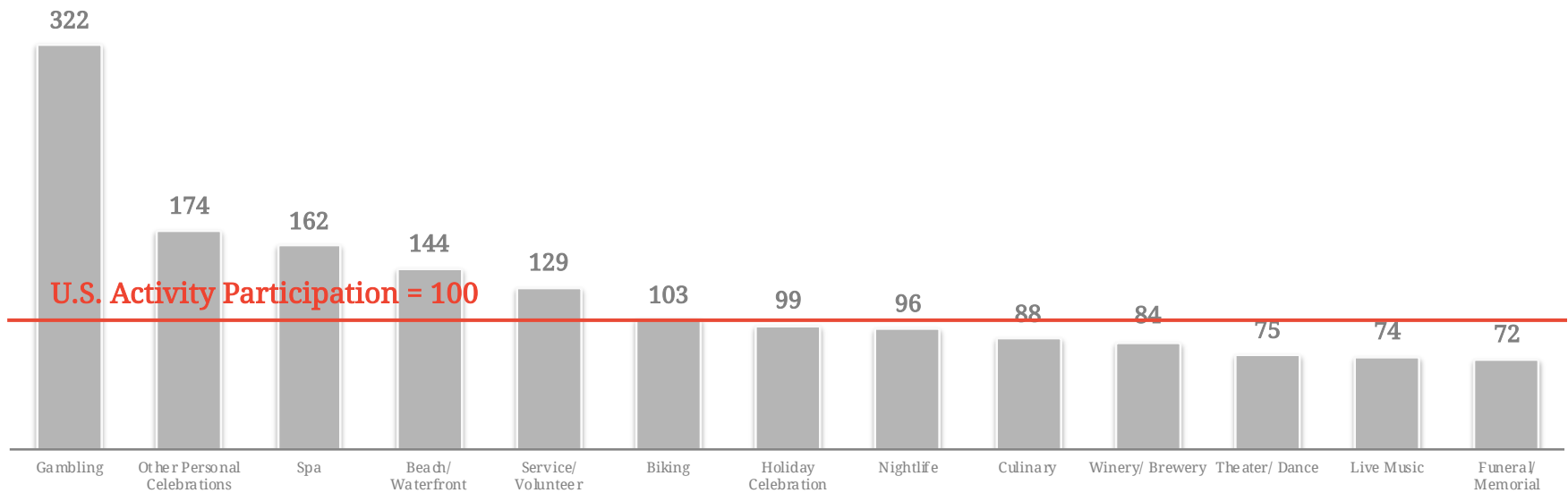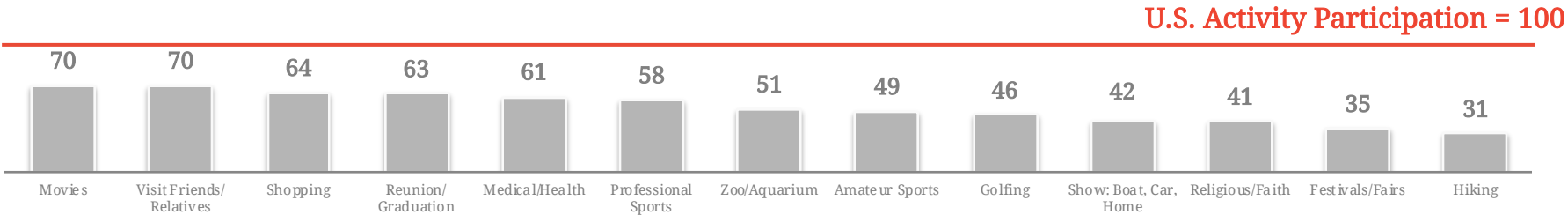
U.S. Activity Participation = 100

Movies	Visit Friends/ Relatives	Shopping	Reunion/ Graduation	Medical/Health	Professional Sports	Zoo/Aquarium	Amateur Sports	Golfing	Show: Boat, Car, Home	Religious/Faith	Festivals/Fairs	Hiking
70	70	64	63	61	58	51	49	46	42	41	35	31

Chart 50 • Segment: 2020 Overnight Leisure Person-Stays • New Jersey n = 486 household count

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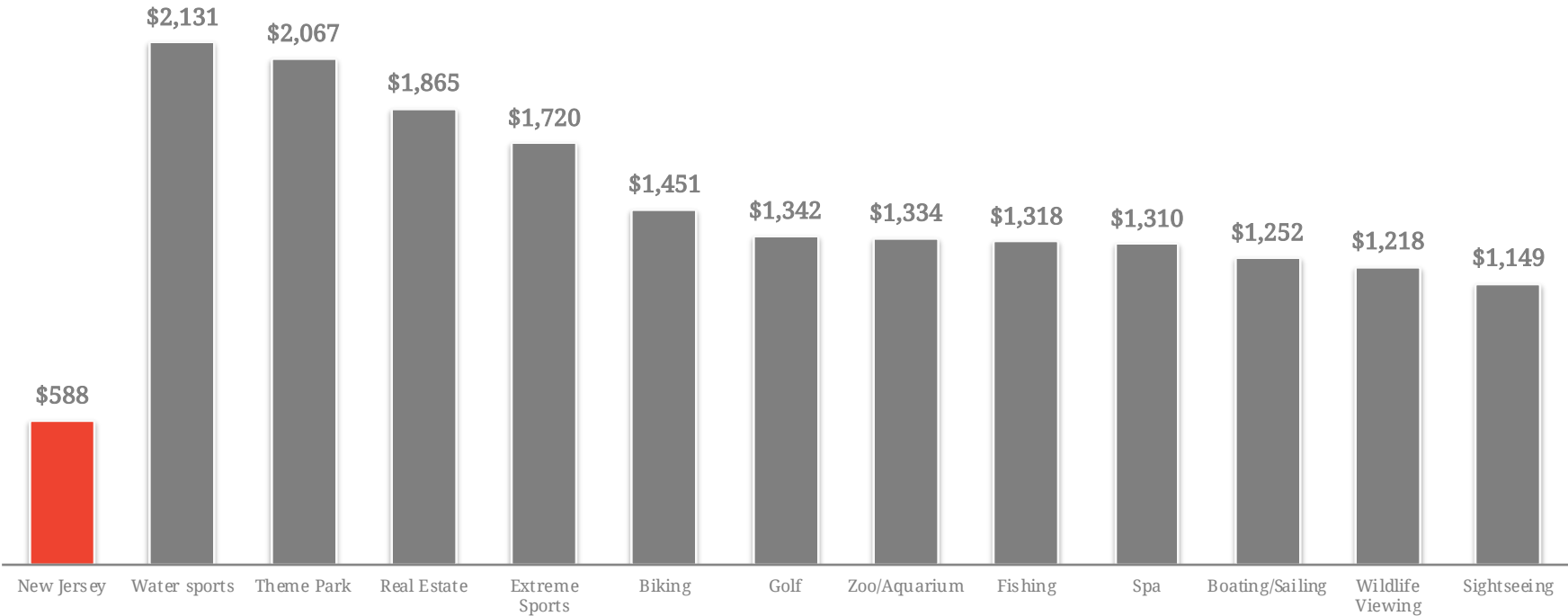
New Jersey Avg. Party per Stay Spending by Activities

Chart 51 • Segment: 2018-2020 Overnight Leisure Stays ($) • New Jersey n = 2,511 household count

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

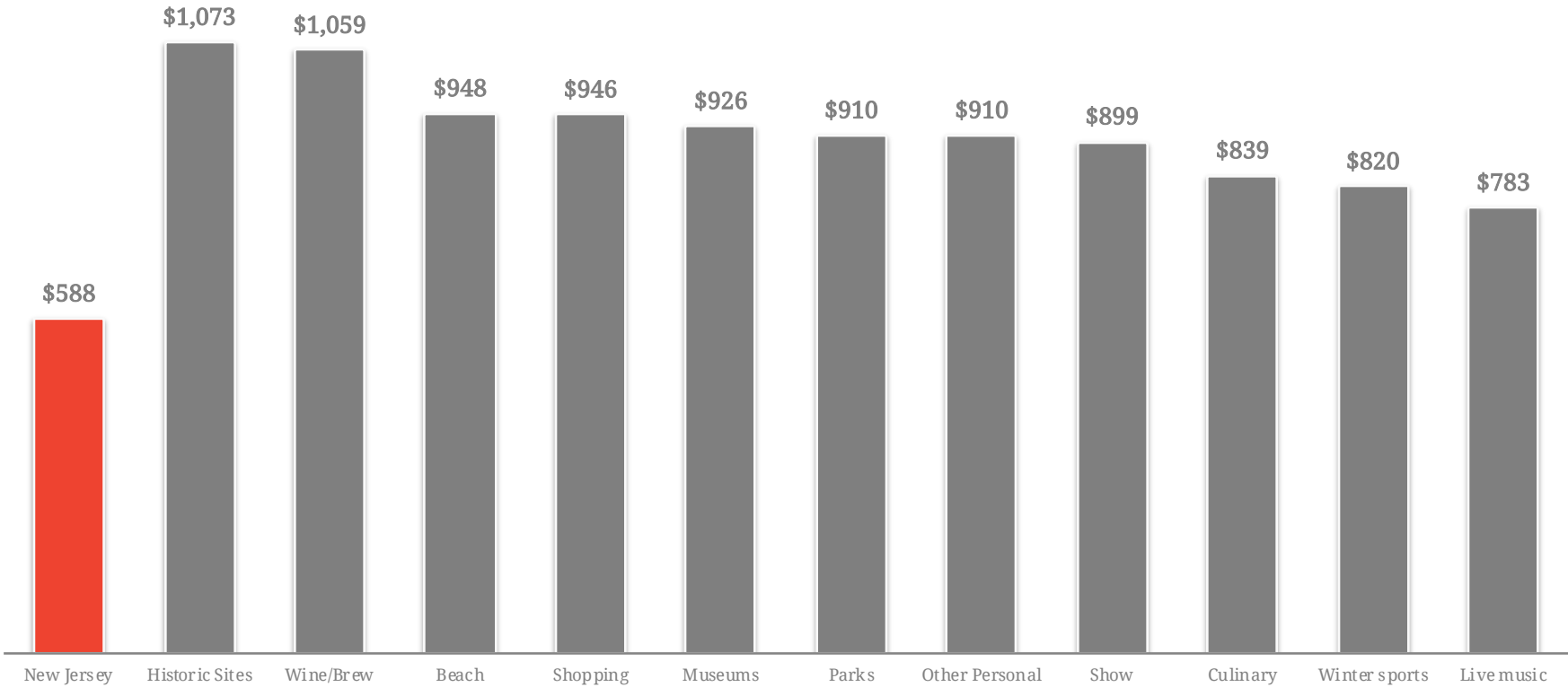Chart 52 • Segment: 2018-2020 Overnight Leisure Stays ($) • New Jersey n = 2,511 household count

Category	Value
New Jersey	$588
Historic Sites	$1,073
Wine/Brew	$1,059
Beach	$948
Shopping	$946
Museums	$926
Parks	$910
Other Personal	$910
Show	$899
Culinary	$839
Winter sports	$820
Live music	$783

New Jersey Activity Comparison

■ Person-Stays Based   ■ Trip-Dollars Based

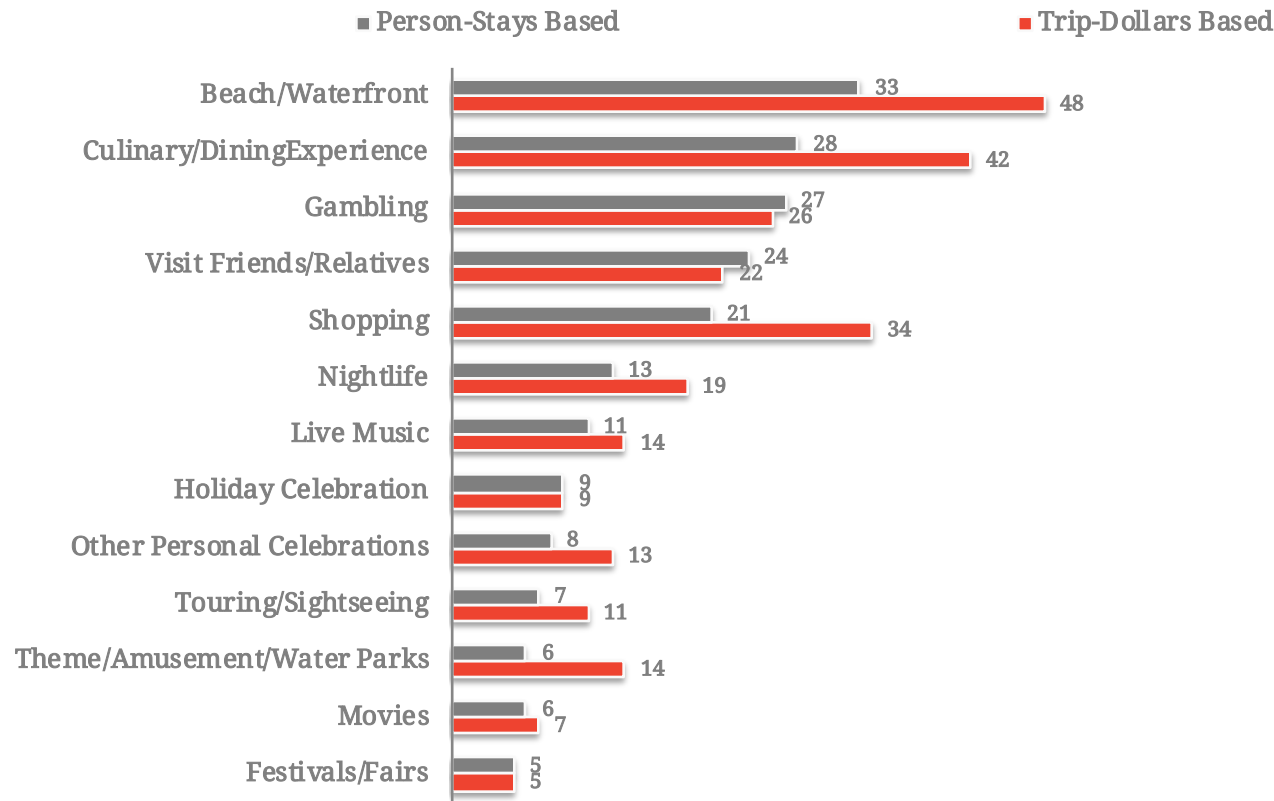| Activity	Person-Stays Based	Trip-Dollars Based
Beach/Waterfront	33	48
Culinary/DiningExperience	28	42
Gambling	27	26
Visit Friends/Relatives	24	22
Shopping	21	34
Nightlife	13	19
Live Music	11	14
Holiday Celebration	9	9
Other Personal Celebrations	8	13
Touring/Sightseeing	7	11
Theme/Amusement/Water Parks	6	14
Movies	6	7
Festivals/Fairs	5	5

Chart 53 • Segment: 2018-2020 Overnight Leisure (%) • New Jersey n = 2,876 household count

New Jersey Activity Comparison (cont.)

■ Person-Stays Based   ■ Stay-Dollars Based
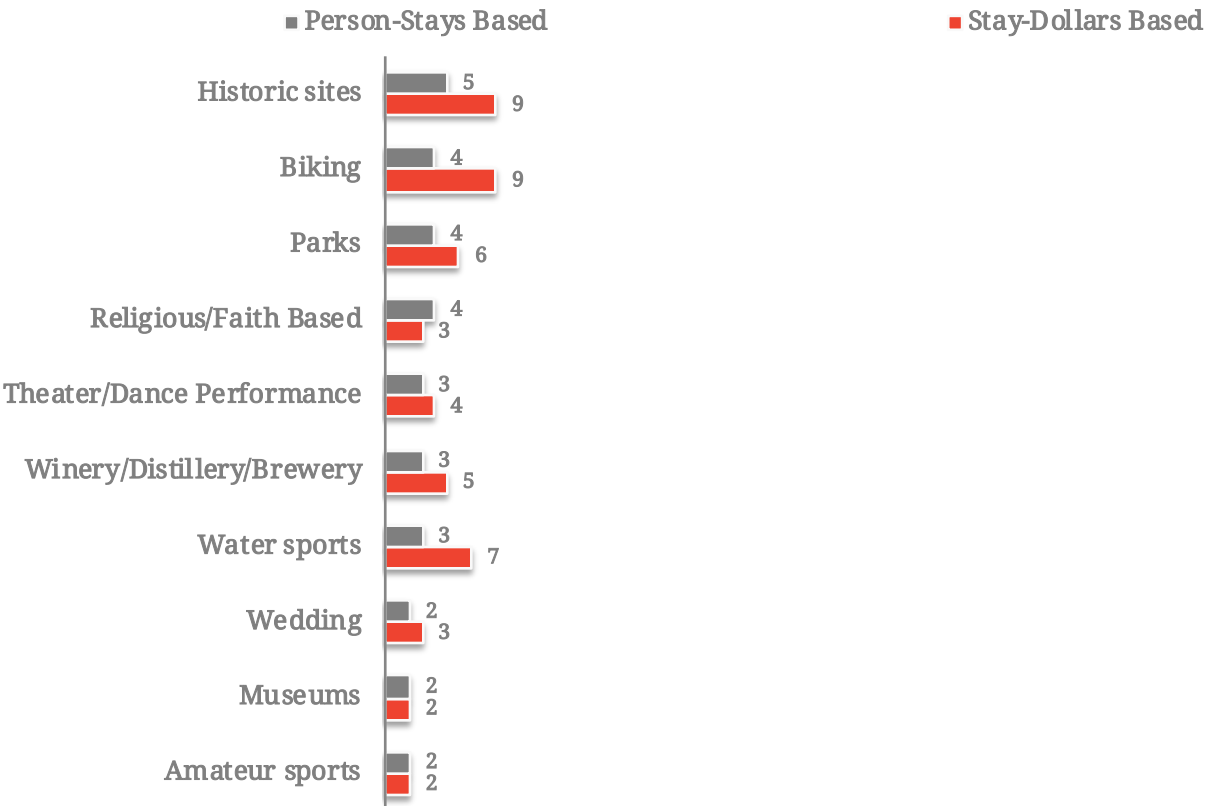
Activity	Person-Stays Based	Stay-Dollars Based
Historic sites	5	9
Biking	4	9
Parks	4	6
Religious/Faith Based	4	3
Theater/Dance Performance	3	4
Winery/Distillery/Brewery	3	5
Water sports	3	7
Wedding	2	3
Museums	2	2
Amateur sports	2	2

Chart 54 • Segment: 2018-2020 Overnight Leisure (%) • New Jersey n = 2,876 household count

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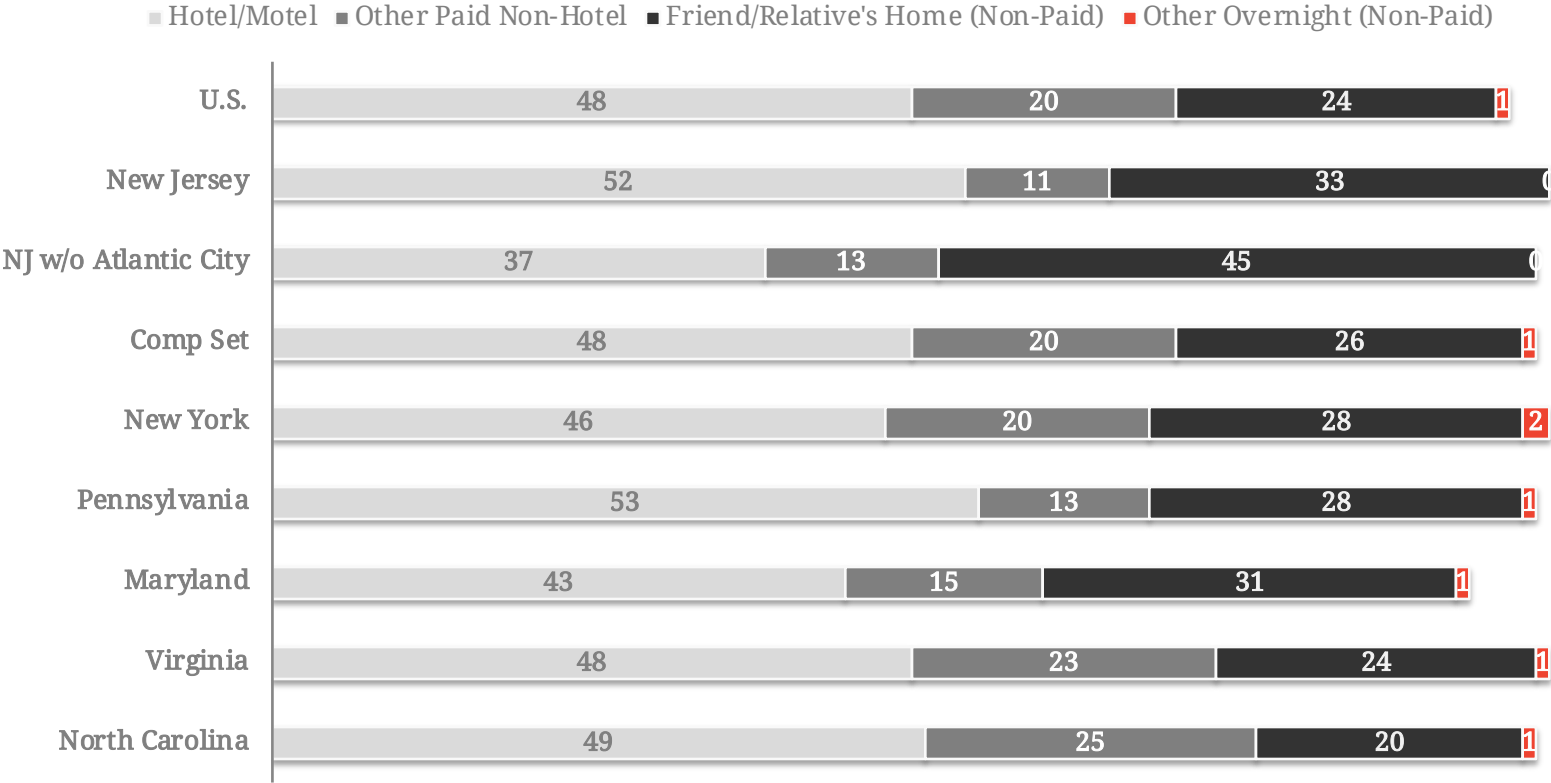# U.S., New Jersey and Comp Set

ACCOMMODATION

■ Hotel/Motel ■ Other Paid Non-Hotel ■ Friend/Relative's Home (Non-Paid) ■ Other Overnight (Non-Paid)

	Hotel/Motel	Other Paid Non-Hotel	Friend/Relative's Home (Non-Paid)	Other Overnight (Non-Paid)
U.S.	48	20	24	1
New Jersey	52	11	33	0
NJ w/o Atlantic City	37	13	45	0
Comp Set	48	20	26	1
New York	46	20	28	2
Pennsylvania	53	13	28	1
Maryland	43	15	31	1
Virginia	48	23	24	1
North Carolina	49	25	20	1

Chart 55 • Segment: 2020 Overnight Leisure Person-Stays (%) • New Jersey n = 486 household count

New Jersey Avg. Party per Stay Spending by Accommodation Type
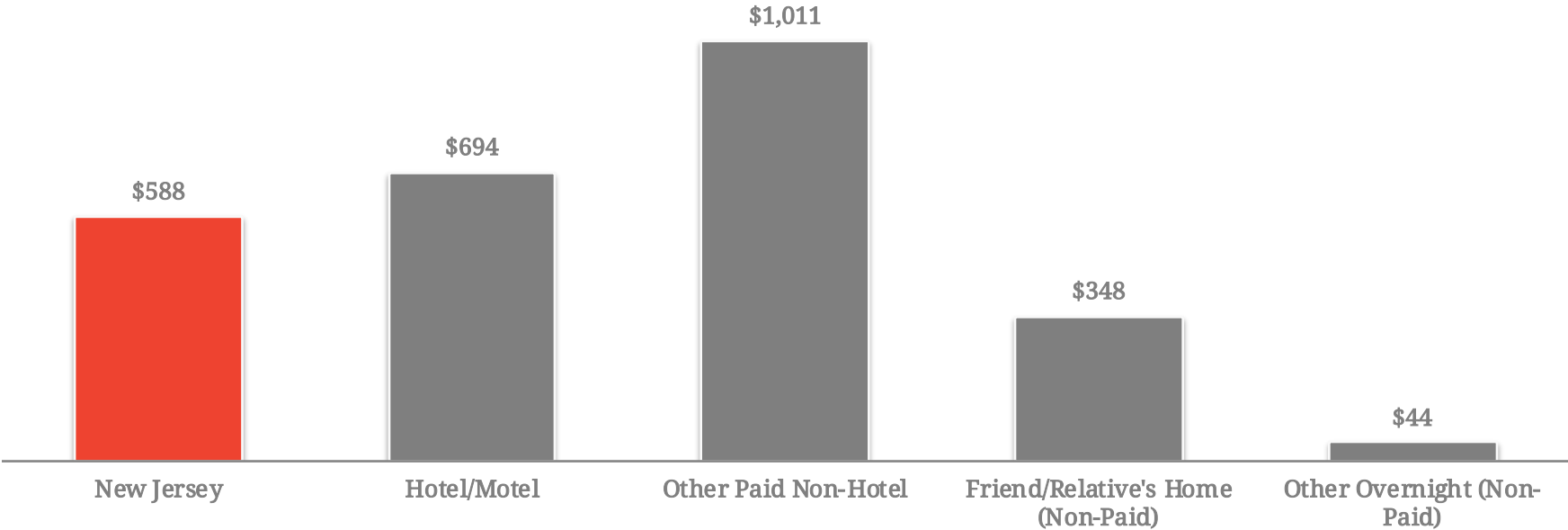
Chart 56 • Segment: 2018-2020 Overnight Leisure Stays ($) • New Jersey n = 2,511 household count
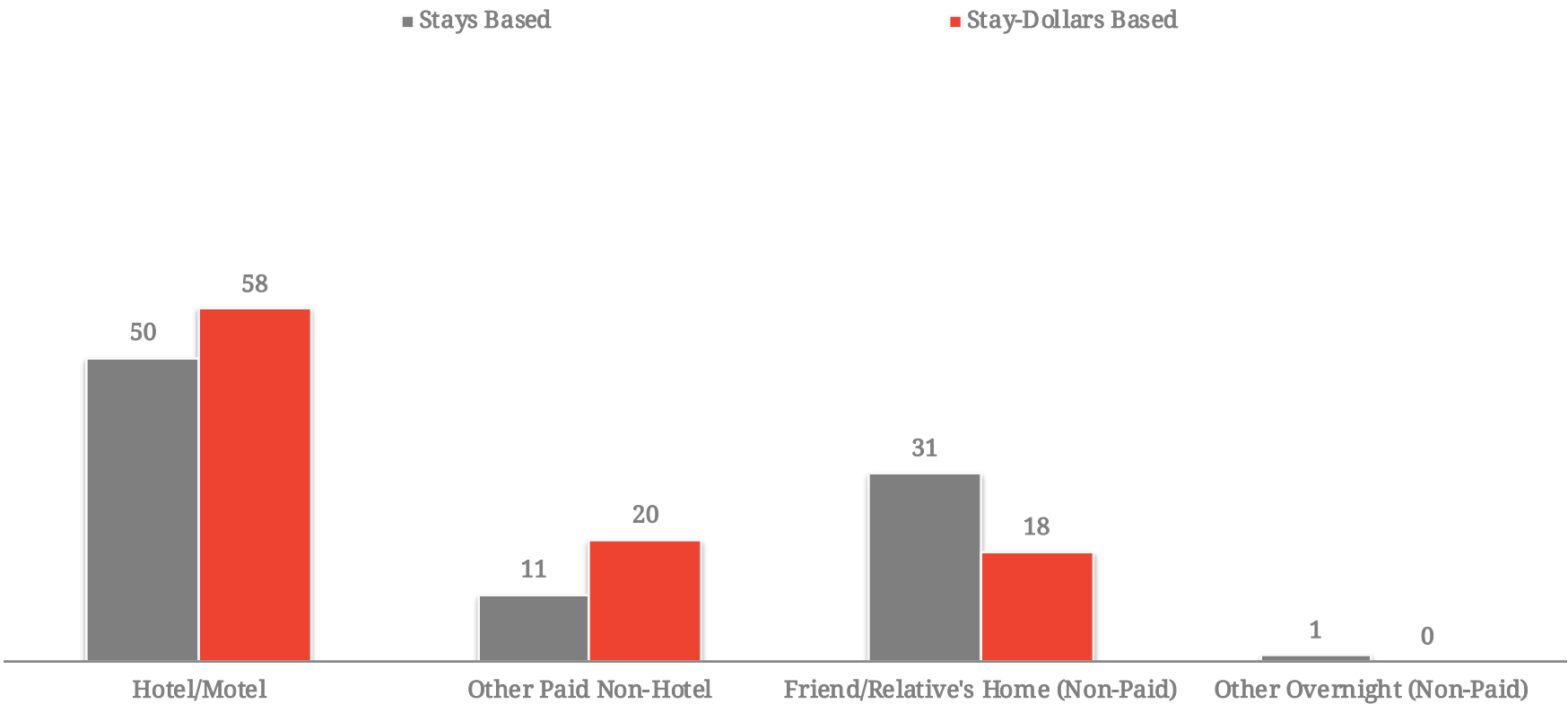
New Jersey Accommodation Type Comparison

■ Stays Based   ■ Stay-Dollars Based

Accommodation Type	Stays Based	Stay-Dollars Based
Hotel/Motel	50	58
Other Paid Non-Hotel	11	20
Friend/Relative's Home (Non-Paid)	31	18
Other Overnight (Non-Paid)	1	0

Chart 57 • Segment: 2018-2020 Overnight Leisure (%) • New Jersey n = 2,876 household count

Appendix

Glossary

Household Count	The number of unique respondents responding to the survey who visited the destination during the travel year.
Stays	Stays represent the number of distinct groups of travelers (travel parties or groups) visiting a destination on a trip, regardless of the number of people within the travel group.
Person-Stays	The total number of people or visitors that traveled to your destination, regardless of the length of their stay.
Person-Days	The total number of days that all visitors contributed to your destination.
Trip-Dollars	Using the Trip-Dollars weight shows the monetary worth/contribution of travelers to a destination's economy as opposed to the contribution of number of trips or number of days spent at the destination.
Room-Nights	The number of nights spent in a room, regardless of the number of people staying in the room.
Stay Expenditures	Combines per-person spending with Person-Days to calculate the money spent on each stay to your destination.
Generations	Millennial (1981-1996), GenX (1965-1980), Boomer (1946-1964), Silent/GI (before 1945)
Average Party Per Stay Spending	Includes reported expenditures of all travelers (including transportation expenditure) who spend more than $1 on their trip to or within the destination. Individual averages for subgroups of variables, such as accommodation types or activities might be higher than the total average party per trip spending for a destination because the travelers' spending is included only in those subgroups of variables to which the respondent replied.
Traveling Party	Children Present: Is defined as one or more adults accompanied by one or more persons under age 18. The child necessarily has to live in the household.
	MM/FF: Include either two females or two males from different households traveling together.

Statistical References

Confidence Interval

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

Leisure Travel	Sample Size for 2020	At or near 2% or 98%	At or near 5% or 95%	At or near 10% or 90%	At or near 25% or 75%	At or near 50%
U.S.	18,898	0.1%	0.2%	0.3%	0.5%	0.6%
New Jersey	486	0.7%	1.4%	2.0%	2.8%	3.7%
New York	1,116	0.5%	0.9%	1.3%	1.9%	2.5%
Pennsylvania	762	0.6%	1.1%	1.6%	2.3%	3.0%
Maryland	306	0.9%	1.7%	2.5%	3.6%	4.7%
Virginia	553	0.7%	1.3%	1.8%	2.6%	3.5%
North Carolina	791	0.6%	1.1%	1.5%	2.2%	2.9%

Example:

If the air travel finding for the U.S. is 11% and the sample size is 25,548, using the chart, we can say that at the 90% level of confidence the proportion ranges between 10.7% and 12.5%.

Example:

If the air travel finding for New Jersey is 7% in previous time period and 6% in current time period, using the chart, we can say that the actual proportion change is not statistically significant since the resulting Z score (-0.82) is smaller than the table Z score (1.64).

Significance Testing

The chart below compares two proportions from different samples for statistical significance.

Instructions: Enter the proportion for each sample and sample size in the appropriate cells in the data input section, using the Z Score Table, compare the resulting Z score with the Z score corresponding to your desired confidence level. If the resulting Z score is greater than the table Z score, the difference between the two proportions is statistically significant. If the resulting Z score is lower, there is no significant difference.

Data Input	Sample 1	Sample 2	Resulting Z Score	Z score	Confidence Level
Proportion	6.0%	7.0%		(+/-) 1.96	95%
Sample Size (n)	783	865	-0.82	(+/-) 1.64	90%

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

DK Shifflet data are collected using an online methodology employing KnowledgePanel®, an address based sample panel offered by Knowledge Networks. The sample is drawn as a national probability sample and returns are balanced to ensure representation of the U.S. population according to the most recent U.S. Census. Key factors used for balancing are Origin State, Age, Income, Education, Gender, Ethnicity/race and return rates. The Knowledge Networks sample is used to create benchmark weights which are applied to surveys returned from other managed panels used by DK Shifflet.

Both traveling and non-traveling households are surveyed each month enabling DK Shifflet to generate the best estimate of travel incidence (volume) within the total U.S. population. Among those who have traveled (overnight in the past three months, and daytrips in the past month) details of their trip(s) are recorded for each month. This overlapping, repeating monthly approach boosts the observed number of trips for each travel month and controls for seasonality and telescoping biases.

"Travel" is defined as either an overnight trip defined as going someplace, staying overnight and then returning home or as a day trip defined as a place away from home and back in the same day. Respondents report travel behavior for each stay of each trip; an approach that enhances reporting for specific travel events, activities and spending.

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

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

Extensive coding lists are updated regularly to ensure that all data is recorded accurately. DK Shifflet's Quality control committee conducts bi-monthly meetings to review survey results and examine methods to maintain and improve quality control.

About DK Shifflet

DK Shifflet, an MMGY Global Company, is the leading U.S. consumer travel research firm. DK Shifflet is located in McLean, VA and has, for more than 30 years, provided the Industry's most complete consumer based travel data on U.S. residents and their travel worldwide. Our clients include destination marketing organizations, theme parks, auto clubs, hotel chains and more.