New Jersey Image and
Advertising Return-on-Investment   2009

Prepared for:

Brushfire, Incorporated

On behalf of:

New Jersey Division of Travel & Tourism

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INTRODUCTION

D.K. Shifflet & Associates Ltd. (DKSA) is pleased to present research results for the 2009 New Jersey Image and Advertising Return-on-Investment Study. The New Jersey Division of Travel & Tourism requested research to study the image of New Jersey as a travel destination and to determine the return-on-investment (ROI) of its 2009 television advertising campaign.

The objective of this research study is twofold. As in the past, it is to provide measures of perceptions of New Jersey as a travel destination among travelers to New Jersey, New York and Pennsylvania. In addition, the 2009 study has been expanded to include the estimation of the ROI for the 2009 television campaign for the markets targeted by the campaign. To that end, DKSA designed the following research to help identify positive and negative images of the State and to determine specific advertising awareness, influence on consideration and actual visitation and incremental spending that can be attributed to the New Jersey television advertising.

The study surveyed travelers from New Jersey's key origin markets, Connecticut, Maryland, New Jersey, New York, and Pennsylvania and Washington D.C., which account for 80% of all New Jersey travel. Qualified survey respondents were those who took a leisure trip in the last 12 months or planned to take a trip in the next 12 months. This represents a change from the 2006 sample plan in which qualified respondents had taken or planned to take a trip specifically to New Jersey, New York or Pennsylvania in the past or next 12 months. This revision was required for the ROI portion of the study inr which it was important to determine advertising awareness of all potential travelers from the target geography not just those traveling to New Jersey, New York and Pennsylvania.

The following report will detail the survey findings and provide recommendations for action aimed at highlighting the State's tourism strengths and address its weaknesses. An analysis of travel considerations in general followed by consideration and image of travel to New Jersey as compared to New York and Pennsylvania will be presented. The report will culminate in a return-on-investment analysis of the 2009 New Jersey television campaign.

EXECUTIVE SUMMARY

This study is based on a sample of 2,007 traveling respondents who reside in the New Jersey target markets of New York, Pennsylvania, Connecticut, Maryland, Washington, D.C and the state of New Jersey itself. Reported findings are based on all those traveling from the target geography or those traveling to the specific states of New Jersey, New York and Pennsylvania.

After September 11, 2001, DKSA reported that people traveled primarily to reduce stress and reconnect with family and friends. This was also reflected in the 2005 and 2006 New Jersey Image studies. In 2009 there has been a shift away from connection with others to more focus on the self. While reducing stress is still the number one reason for taking a leisure trip, getting re-energized has replaced reconnection with family and friends as the number two reason respondents in this study choose to travel. Accordingly, in addition to quality and value, travelers are looking for destinations that provide a desirable atmosphere.

While, in general, people are taking up to a month longer to plan a general vacation and a week longer to plan a weekend getaway, visitors to New Jersey are planning their trips in even shorter time-frames than in the past indicating an increase in spontaneous trip planning. This phenomenon is also occurring in New York and Pennsylvania indicating that there may be competition from these states for deals on quick getaways.

Travelers from the target market are becoming increasingly more dependent on, and satisfied with, the Internet as a trip planning resource. Although the use of visitnj.org declined slightly in 2009, satisfaction with the site increased to higher levels than reported in either the 2005 or 2006 studies. Optimizing placement of visitnj.org on search engines may help get potential visitors linked to the site more quickly.

New Jersey faces misperceptions among travelers from its key origin markets. New Jersey visitors rate the State higher on all individual image attributes than do travelers in general who reside in the target markets. Those with the largest discrepancy need to be re-positioned to non-visitors to align the market's image of the State to what it can deliver.

- Overall destination quality
- Quality restaurant experiences
- A relaxing place to visit
- Good for family vacations

Most respondents in this study are making these comparisons based on actual experiences with each of the states and not on their impressions alone. About 60% of those visiting New Jersey in the past 12 months have also visited New York and Pennsylvania.

Table 1: Travel in past 12 months
% of travelers visiting destination

	NJ Visitors	NY Visitors	PA Visitors
Visited NJ	100%	52%	56%
Visited NY	63%	100%	60%
Visited PA	58%	51%	100%

Since travelers are likely to visit all three states in any given time period, attention should be paid to competitive promotions. To encourage visitors to choose New Jersey or to stay longer on their New Jersey visit, the unique attractions and activities New Jersey has to offer should be communicated.

All travelers had heard of Atlantic City. Over three-fourths of those had visited the city. Close behind were the Statue of Liberty/Ellis Island, which can be accessed from both New Jersey and New York, and Six Flags Great Adventure, both with awareness levels of over 95%. Lesser-known attractions that were cultural, historic, or outdoor recreation related, received the lowest awareness and activity levels.

The 2009 TV advertising campaign highlighted some of these activities. One third of all those seeing the advertising visited New Jersey in 2009 generating $676 million dollars in incremental spending for a campaign ROI of $315:$1.

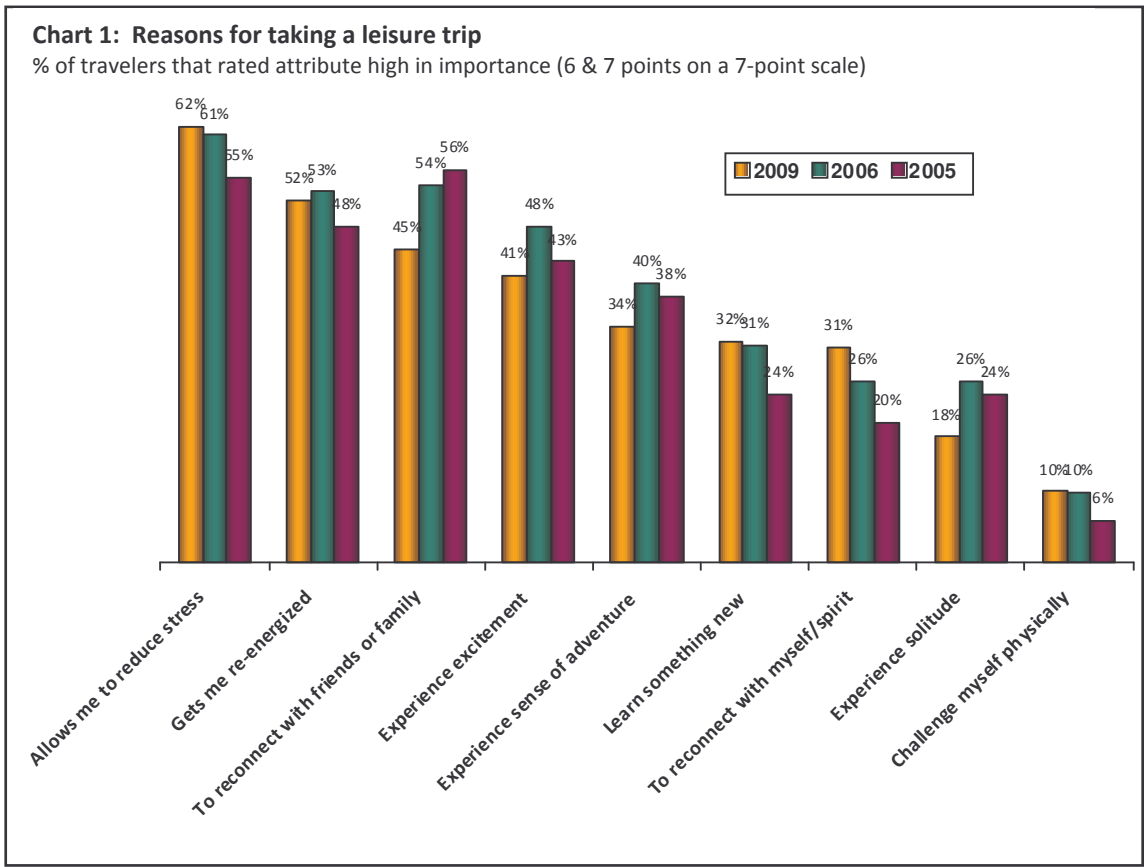## DETAILED FINDINGS – Travel Purpose and Consideration

Why do people take leisure trips?

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

*People take leisure trips to **reduce stress** and get **re-energized***

After September 11, 2001 the most often reported reason for taking a leisure trip was to, understandably, re-connect with family and friends. This was still evident in the 2005 study and only a little less so in 2006. While this is still one of the top three reasons for leisure travel in 2009, reducing stress and getting re-energized are much more often cited than reconnecting with family and friends. As in the past only a minority of travelers seeks to challenge themselves physically when taking a leisure trip.

In general destinations can attract the attention of the majority of travelers by portraying images of relaxation or rejuvenating activities. Destinations with unique offerings may incorporate these attributes in depictions of their attractions.

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

What are people looking for in a leisure destination?

Travelers were asked to rate each of 28 attributes on a scale from 1 (not at all important) to 7 (extremely important) indicating its degree of importance in selecting a destination for a leisure trip.

*In 2009 people are looking for destinations offering **quality** and **value***

In 2009 the most important characteristics when choosing a destination for a leisure trip is first quality and then value. These are followed by the physical environment – scenic beauty and the climate. As compared to the 2006 study, the gap between quality and all other characteristics has widened to a point where quality is clearly the number one characteristic considered when choosing a destination for a leisure trip.

To put this list of characteristics into perspective and to provide an easier way for evaluating these data, characteristics have been statistically correlated and grouped into six major categories and a group percentage has been derived for each. The following table shows each of the characteristics within its category. The top five individual characteristics have been highlighted for ease of identification.

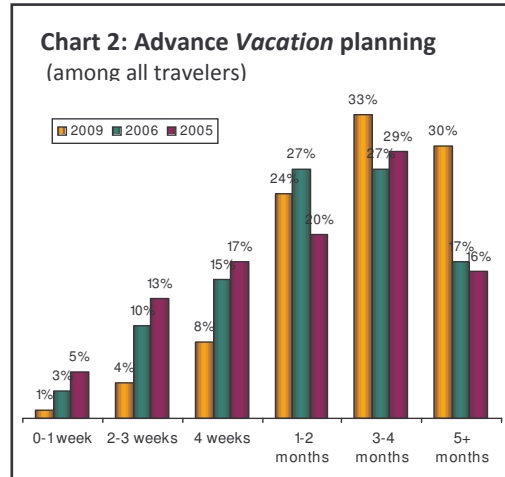**Table 2: Characteristics travelers seek when selecting a destination**
% of travelers that rated attribute high in importance for selecting a destination for a leisure trip
(6 & 7 points on a 7-point scale)

Attribute	%	2009 Ranking	2006 Ranking
QUALITY/VALUE	**57%**	**1**	**1**
Overall destination quality	75%	1	1
Provides good value for the money	71%	2	3
Ease of getting from place to place	58%	8	9
Provides a feeling of safety	58%	9	7
Scenic beauty/visual appeal	69%	3	4
Inexpensive and available parking	35%	17	17
Information available on local sites/events	45%	14	14
Friendliness of local residents	44%	15	12
DESIRABLE ATMOSPHERE	**54%**	**2**	**2**
Restaurant experience	52%	13	15
Nice climate/weather	69%	4	2
Beaches/waterfront	56%	11	13
Luxury hotels and resorts	33%	19	19
Service at hotels, restaurants, etc.	63%	6	11
Relaxing place to visit	66%	5	6
A romantic place to visit	34%	18	20
Good for adult vacation	56%	10	10

Attribute	%	2009 Ranking	2006 Ranking
FAMILY DESTINATION	**39%**	**4**	**4**
Good for family vacations	39%	16	16
OUTDOOR ACTIVITIES	**42%**	**3**	**3**
Outdoor sports/recreation facilities	22%	21	21
A fun/exciting place to visit	61%	7	5
ARTS & CULTURE ACTIVITIES	**28%**	**5**	**5**
Live theater/music/concerts	20%	25	26
Famous historical sites	32%	20	18
Fairs, festivals and cultural events	22%	22	23
Art galleries, antiques/craft shops	15%	27	27
Sightseeing	53%	12	8
ENTERTAINMENT	**18%**	**6**	**6**
Popular, well-known place	18%	26	24
Shopping	21%	23	25
Gaming/casinos/horse racing	12%	28	28
Night life	20%	24	22

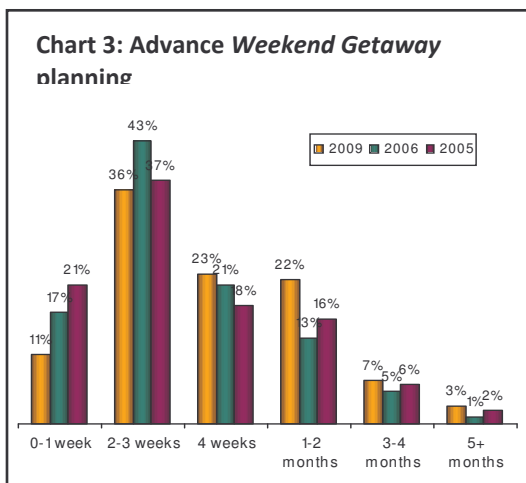## DETAILED FINDINGS – Trip Planning

How far in advance do leisure travelers plan?

Understanding a traveler's trip planning behavior can provide valuable information in building a marketing strategy, particularly as it relates to the content and timing of advertising and in determining the best times to introduce packages and deals. It also defines the window of opportunity to convert 'lookers to bookers.' This section of the report will define the timing of a traveler's trip planning process, what resources are used, and the satisfaction ratings of those resources.

Chart 2: Advance *Vacation* planning
(among all travelers)

Legend: 2009, 2006, 2005

Category	2009	2006	2005
0-1 week	1%	3%	5%
2-3 weeks	4%	10%	13%
4 weeks	8%	15%	17%
1-2 months	24%	27%	20%
3-4 months	33%	27%	29%
5+ months	30%	7%	6%

People in New Jersey's origin markets plan their *Vacation* farther in advance than they ever have. When this study was conducted in 2006 the average vacation planning time was three months with over half of the respondents having reported planning trips within two months or less from the time of their travel. In the current study timing has increased

> *In general, trip planning time frames are **getting longer***

by an entire month with 30% of respondents planning five or more months in advance. One possible explanation is that due to the current economic crisis, people are taking more time deciding on where and how they want to spend their money and this includes on vacations.

Chart 3: Advance *Weekend Getaway* planning

Legend: 2009, 2006, 2005

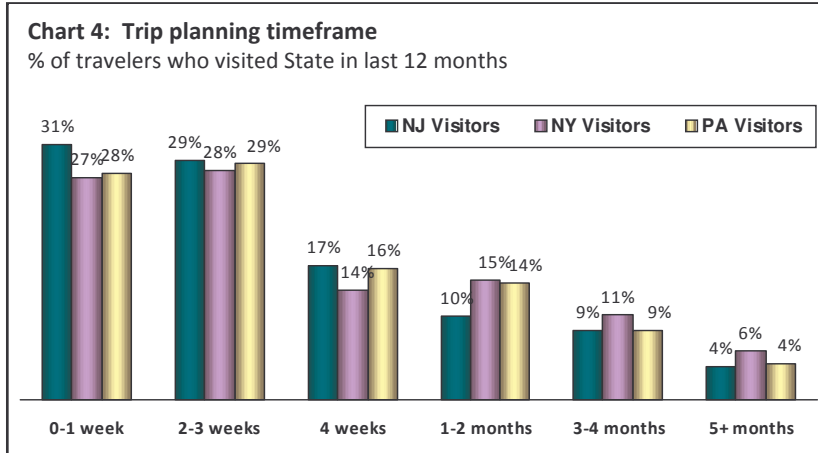| Category	2009	2006	2005
0-1 week	11%	17%	21%
2-3 weeks	36%	43%	37%
4 weeks	23%	21%	18%
1-2 months	22%	13%	16%
3-4 months	7%	5%	6%
5+ months	3%	1%	2%

Although planning a *Weekend Getaway* is completed in a much shorter timeframe than a general vacation, the average planning time has increased by more than one week as compared to the previous study.   In 2006 60% of the travelers surveyed planned their weekend getaways in three weeks or less. In 2009 this percentage has dropped to only 47% and the average timing has increased from just under 4 weeks to 5 weeks. Even though the timing has increased it is still important for destinations to attract the last minute or getaway traveler by making the information gathering fast and looking easy in order to meet these shorter time frames. Assembling weekend packages with activities and lodging in one purchase can ease the stress of booking a trip last minute.

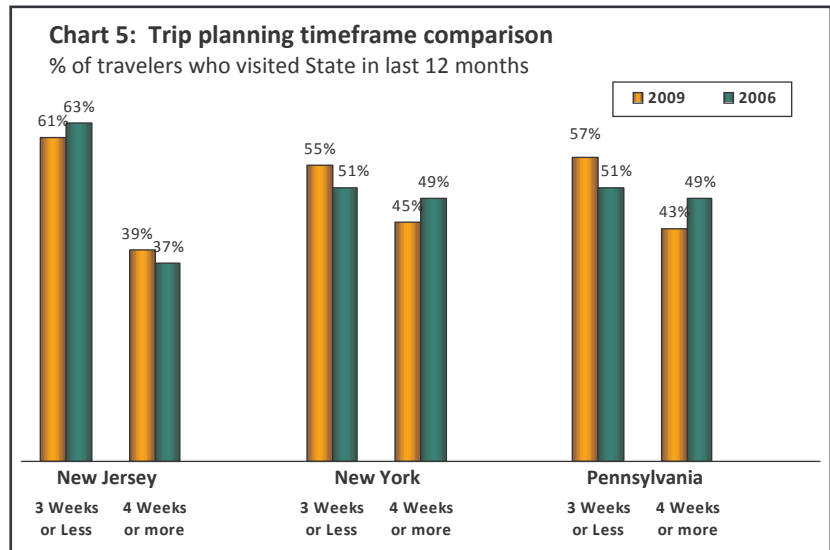### How far in advance are trips planned for New Jersey, New York and Pennsylvania?

Visitors from the targeted geography seemed to have planned their most recent trips to each of the states in similar timeframes. These represent much shorter timeframes than generally reported for either vacations or getaway weekends.

Chart 4: Trip planning timeframe
% of travelers who visited State in last 12 months

NJ Visitors   NY Visitors   PA Visitors

	0-1 week	2-3 weeks	4 weeks	1-2 months	3-4 months	5+ months
NJ Visitors	31%	29%	17%	10%	9%	4%
NY Visitors	27%	28%	14%	15%	11%	6%
PA Visitors	28%	29%	16%	14%	9%	4%

Trip planning is shorter than average for NJ, NY and PA

Since 2006 the trip planning window has increased slightly for New Jersey, but has become shorter for New York and Pennsylvania. While New Jersey visitors still plan in shorter timeframes than do New York or Pennsylvania visitors, short term (3 weeks or less) planners have increased by approximately 8% for New York and almost 12% for Pennsylvania. The result is increased competition for the more spontaneous traveler.

New Jersey has increased competition for short term trip planning

Chart 5: Trip planning timeframe comparison
% of travelers who visited State in last 12 months

2009   2006

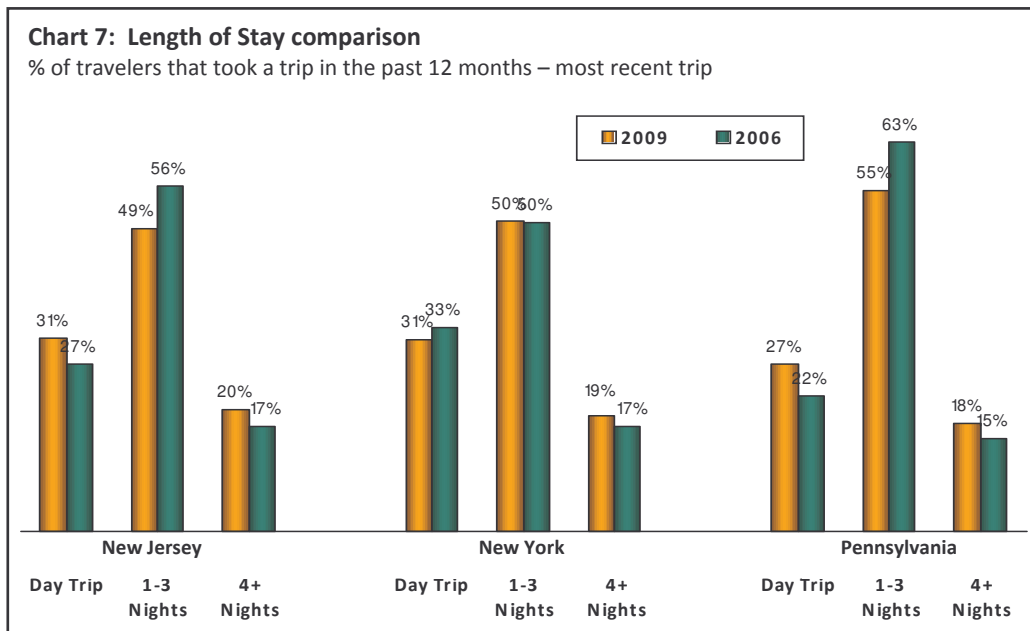|	New Jersey		New York		Pennsylvania	
	3 Weeks or Less	4 Weeks or more	3 Weeks or Less	4 Weeks or more	3 Weeks or Less	4 Weeks or more
2009	61%	39%	55%	45%	57%	43%
2006	63%	37%	51%	49%	51%	49%

How long do visitors stay?

New Jersey continues to be characterized as a short getaway destination with almost one-third of the visitors from the targeted geography visiting for day trips and almost half of the overnight visitors staying three nights or less. The trend is similar for the competing destinations, however Pennsylvania hosts slightly fewer day trippers and a slightly larger number of getaway travelers. Although there are fewer vacation visitors from the target geography, they make up a marginally larger share of New Jersey travel than they do for either New York or Pennsylvania.

Chart 6: Length of Stay
% of travelers that took a trip in the past 12 months – most recent trip

Legend: NJ Visitors, NY Visitors, PA Visitors

	1 day	1-3 nights	4+ nights
NJ Visitors	31%	49%	20%
NY Visitors	31%	50%	19%
PA Visitors	27%	55%	18%
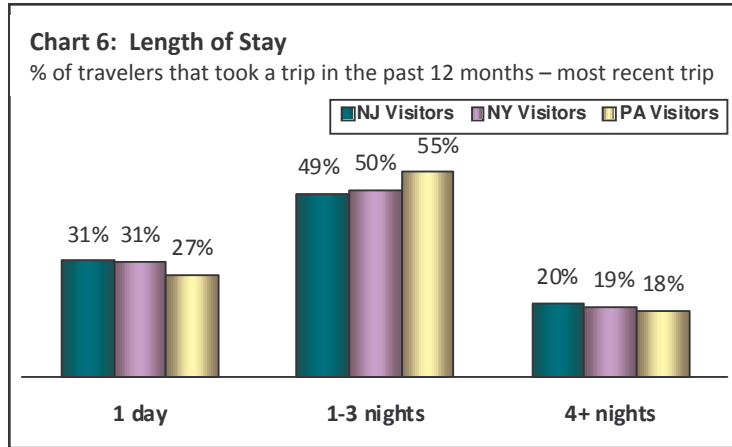
> *New Jersey continues to be short stay destination*

Although the distribution pattern has not changed since the 2006 study, the distribution itself has. For New Jersey and Pennsylvania the percentage of visitors staying 1-3 nights has declined. These visitors have either shifted to day trips or to longer visits of 4 or more nights. Trading up to longer visits is good for the State, while trading down to daytrips generally means less money will be spent on the trip. New York has the best situation. The share of day trippers from the origin geography has declined, but share of longer visits has increased which should translate to more money being spent in the State.

Chart 7: Length of Stay comparison
% of travelers that took a trip in the past 12 months – most recent trip

Legend: 2009, 2006

	New Jersey			New York			Pennsylvania		
	Day Trip	1-3 Nights	4+ Nights	Day Trip	1-3 Nights	4+ Nights	Day Trip	1-3 Nights	4+ Nights
2009	31%	49%	20%	31%	50%	19%	27%	55%	18%
2006	27%	56%	17%	33%	50%	17%	22%	63%	15%

What information sources to visitors use to plan their trips?

Recommendations from friends and family have long been the most reported source used for planning leisure travel. While almost two-thirds of those surveyed continue to rely on friends and family this is less than reported in previous studies.   The use of the

The Internet is used as much as friends and family for trip planning

Internet remains strong and very similar to the trusted friends and family. The percentages of those using any other source of information in trip planning falls far behind either of these widely used sources of information.

Such a heavy dependence on a resource that is difficult for advertisers to harness poses challenges for getting messages to potential visitors. This may become even more prevalent as more and more people using social media networks look to people they don't even know for travel recommendations. Using or expanding the use of social networking tools to get destination messages out may be a viable way of addressing this phenomenon. Continuing efforts to keep attractions, activities, restaurants, etc. top-of-mind to recent visitors could certainly help in recommendation frequencies. Re-connect with past visitors and New Jersey residents in terms of promotions and customer service as they are the main vehicles for traveler information.

Although reported use of all online resources is down, they remain among the highest ranked resources used in trip planning.

Chart 8: Information sources used in trip planning
% of all travelers using resource

Source	2009	2006	2005
Friends/Family Recommendation	64%	72%	66%
Internet Search Site (Google, Yahoo, etc.)	63%	63%	N/A
Hotel/Lodging Website	39%	44%	34%
Internet Travel Booking	25%	36%	21%
State Website	18%	31%	26%
Published Event Calendar	11%	19%	12%
Purchased Guide Book	6%	12%	19%
Rental Real Estate Agent	3%	3%	N/A
Travel Agent	2%	4%	5%
State Toll-Free Number	1%	6%	6%

Do New Jersey visitors use different planning resources than visitors to New York and Pennsylvania?

Visitors to New Jersey from the origin geography depend slightly more on friend and family recommendations than do visitors to either of the other states. They use the Internet, regardless of site type, less than visitors to the competing states. Due to the close proximity of the origin market, it is not surprising that travel agents are almost never used as a resource for planning travel to any of the states.

*New Jersey visitors depend on **personal recommendations***

It is interesting to note that visitors to New York use almost all of the resources, excluding personal recommendations, including those from travel real estate and travel agents, at a higher rate than do visitors to New Jersey or Pennsylvania.

Chart 9: Travel planning resources used for visits to each State
% of all travelers who used resource

Resource	NJ Visitors	NY Visitors	PA Visitors
Friends/Family Recommendation	67%	65%	65%
Internet Search Site (Google, Yahoo, etc.)	59%	67%	66%
Hotel/Lodging Website	38%	40%	37%
Internet Travel Booking	24%	26%	24%
State Website	16%	19%	19%
Published Event Calendar	11%	12%	11%
Purchased Guide Book	5%	7%	6%
Rental Real Estate Agent	5%	3%	3%
State Toll-Free Number	2%	1%	1%
Travel Agent	2%	2%	1%

Although New Jersey visitors rely on personal recommendations more than do visitors to the competitive states they are relying on them less in 2009 than they did in 2006. In contrast, they are relying more on Internet searches than they did in 2006. Excluding Internet searches the use of travel planning resources has dropped for all resources since the 2006 study was conducted. This would indicate that either there is a strong familiarity with the New Jersey product or that the resources are not providing the types of information needed for decision making.

*New Jersey visitors increase their use of the **Internet Search** as travel planning resource*

Chart 10: New Jersey visitor travel planning resources historical comparison
% of all travelers who used resource

Resource	2009	2006	2005
Friends/Family Recommendation	67%	73%	58%
Internet Search Site (Google, Yahoo, etc.)	59%	56%	N/A
Hotel/Lodging Website	38%	39%	30%
Internet Travel Booking	24%	31%	20%
State Website	16%	20%	20%
Published Event Calendar	11%	14%	10%
Purchased Guide Book	5%	9%	13%
Rental Real Estate Agent	5%	5%	N/A
State Toll-Free Number	2%	5%	6%
Travel Agent	2%	4%	6%

What do visitors think of the travel planning resources they use?

The chart below illustrates New Jersey visitors as well as New York and Pennsylvania visitors' satisfaction ratings of the various travel planning resources. Although data are presented for all resources, due to low usage levels, data for asterisked resources are based on small sample sizes and should be used with caution.

Not surprisingly, friend and family recommendations receive the highest satisfaction ratings. The number of people satisfied with internet search sites increased from 38%

Satisfaction with Internet search sites grows

of users giving high ratings in 2006 to 47% doing so in 2009. Travel booking sites, such as Orbitz and Travelocity received similar high satisfaction ratings in both years (35% vs. 34%). This may be a reflection of increased internet user confidence.

Visitors to individual states vary little in their high satisfaction ratings of the sources measured in this study. Although reported usage of State websites is less than 20% for all states, New Jersey visitors report the lowest State website use. Those who use it, however, report a higher satisfaction level, than visitors to New York and Pennsylvania report for their websites. This is a complete reversal over the 2006 ratings, indicating that whatever enhancements that have been made to visitnj.org are having a positive impact.

Chart 11: Information sources rated – visitors to each State
% of users giving high satisfaction ratings - (6 & 7 on a 7-point scale)

Source	NJ Visitors	NY Visitors	PA Visitors
Friends/Family Recommendation	58%	57%	60%
Rental Real Estate Agent*	58%	57%	58%
Internet Search Site (Google, Yahoo, etc.)	49%	49%	48%
Purchased Guide Book*	37%	42%	36%
Travel Agent*	36%	37%	48%
Hotel/Lodging Website	35%	39%	42%
State Website*	35%	33%	29%
Internet Travel Booking	27%	32%	33%
Published Event Calendar*	25%	25%	27%
State Toll-Free Number*	18%	29%	29%

Caution: Data based on small sample sizes.

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New Jersey visitors are not only using Internet search sites more than they did in the past, but they are also rating their satisfaction of these sites higher. Unfortunately, the use of www.visitnj.org declined slightly. In contrast, however, although based on a small sample size, high ratings of the site have increased. This would indicate that those who do visit the site are finding it useful in planning a trip to New Jersey.

Satisfaction with visitnj.org increases

The task now is to get those who have been less satisfied in the past to come back to the site. In addition, because personal recommendations are valued so highly by New Jersey visitors it may be prudent to encourage residents to come visit the site with the goal of getting them to recommend it as a source of information to their friends and family.

Chart 12: Information sources rated – New Jersey historical comparison
% of users giving high satisfaction ratings - (6 & 7 on a 7-point scale)

Information Source	2009	2006	2005
Friends/Family Recommendation	58%	50%	55%
Rental Real Estate Agent*	58%	31%	
Internet Search Site (Google, Yahoo, etc.)	49%	34%	
Purchased Guide Book*	37%	28%	40%
Travel Agent*	N/A	36%	64% / 61%
Hotel/Lodging Website	N/A	35% / 31%	29%
State Website*	35%	21%	26%
Internet Travel Booking	27%	36%	45%
Published Event Calendar*	25%	33%	28%
State Toll-Free Number*	18%	40%	33%

Caution: Data based on small sample sizes.

DETAILED FINDINGS – Awareness

Which New Jersey destinations and attractions are potential travelers from the State's key origin markets aware of and which ones have they visited?

To gauge how well-known New Jersey attractions are among the key origin markets, travelers were asked to indicate if they had first heard of any of a series of attractions in the State. Next, if they had heard of the destination or attraction, they were asked if they had visited it.

Atlantic City, Statue of Liberty/Ellis Island, and Six Flags Great Adventure Are New Jersey's best known destinations

All respondents have heard of Atlantic City and three quarters of them have visited the City. Although not as highly visited as Atlantic City, the Statue of Liberty/Ellis Island and Six Flags Great Adventure are also known to almost every respondent. As in previous studies, Cape May and the Meadowlands Sports complex continue to round out the top five well-known New Jersey destinations or attractions. For all of these locations, of those who have heard of the destination, more than 50% have visited.

One interesting destination is Lambertville. While just over one-quarter of the respondents have heard of the town, almost 70% of those have visited.

Chart 13: New Jersey destination awareness
% of all travelers/% "heard of"

Destination	Heard of	Visited (% Heard of)
Atlantic City	100%	76%
Statue of Liberty/Ellis Island*	98%	65%
Six Flags Great Adventure	95%	58%
Cape May	86%	54%
Meadowlands Sports Complex	81%	52%
Wildwood	79%	56%
Long Beach Island	70%	45%
Delaware Water Gap	69%	62%
Point Pleasant	57%	46%
Liberty State Park/Science Center	56%	45%
Monmouth Park	53%	24%
Camden Aquarium	48%	35%
New Jersey Performing Arts Center	45%	30%
Jersey Gardens	37%	35%
Lambertville	28%	68%
Jockey Hollow, Washington Crossing	26%	45%
Mountain Creek	18%	41%
Wheaton Village	16%	34%

* The Statue of Liberty can be accessed from locations in both New Jersey and New York.

While many of New Jersey's key attractions have high levels of awareness in the origin markets, some of the State's key cultural and outdoor recreation related destinations continue to have low levels of awareness. For some destinations or attractions the "not heard of" levels in 2009 are even higher than they were in 2006.

The following chart reveals the destinations where respondents had not heard of the location. Therefore, to develop and promote niche markets like culture, heritage, or outdoor recreation, increased promotion of these destinations is needed in the origin markets.

Chart 14: New Jersey destinations with low awareness
% of travelers who have *not heard* of destination

Destination	2009	2006
Wheaton Village	84%	85%
Mountain Creek	82%	82%
Jockey Hollow, Washington Crossing	74%	70%
Lambertville	72%	72%
Jersey Gardens	63%	58%
New Jersey Performing Arts Center	55%	48%
Camden Aquarium	52%	51%
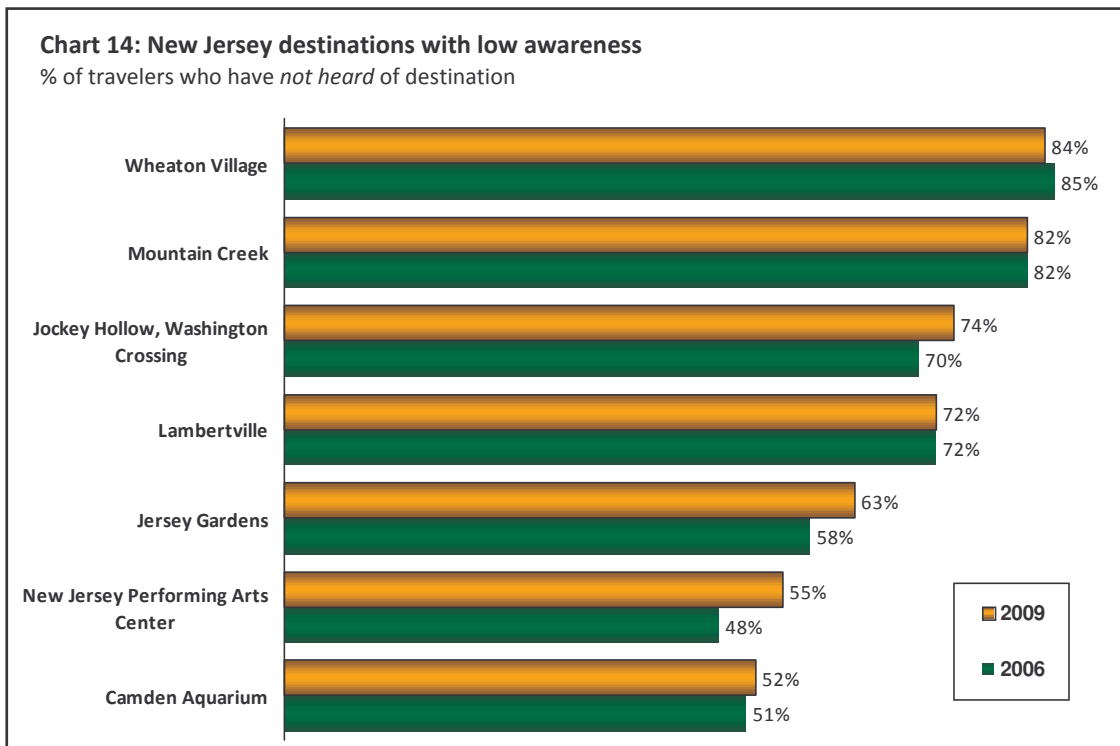
DETAILED FINDINGS – Activities

What activities do visitors do when they visit?

Certain aspects of a destination's image can be influenced by the top activities travelers participate in while visiting. The level of activity participation can also determine a destination's competitiveness. Dining and shopping are popular activities for all three destinations. New Jersey visitors, however, are more likely to participate in beach and gaming activities than are visitors to either New York or Pennsylvania. They are not as likely to go touring/sightseeing, to visit historic sites or visit museums and art exhibits as are visitors to either New York or Pennsylvania.

*New Jersey visitors come to enjoy its **beaches** and **gaming***

 The following chart reveals the top ten activities in which New Jersey visitors participate and compares these to participation levels of visitors to New York and Pennsylvania.

Chart 15: Top 10 New Jersey activities
% of all travelers who participated in activities

Activity	NJ Visitors	NY Visitors	PA Visitors
Dining & Experiencing Local Cuisine	62%	63%	62%
Shopping	59%	57%	55%
Beach, Lake, River, Waterfront	41%	30%	28%
Touring/Sightseeing	37%	45%	44%
Nightlife	27%	29%	23%
Gaming/Horse/Dog Racing	26%	15%	17%
Visit Historic Sites	24%	28%	31%
Browse Antique/Craft Shops	21%	17%	22%
Festival, Craft Fair	20%	20%	22%
Live Theater/Performing Arts/Concert	20%	26%	20%
Museum, Art Exhibit	20%	27%	24%

DETAILED FINDINGS – Image

How is New Jersey perceived?

Understanding how a destination is perceived can inform the promotional effort.

*New Jersey delivers well as a **family** and **entertainment** destination*

Positive images can be expounded, while negative ones that can typically inhibit marketing efforts can be minimized or counterbalanced. The survey measures New Jersey's image as a travel destination to illuminate the inherent strengths of the State and reveal possible 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 delivered that attribute to travelers, based on all that they knew about the destination. The respondents were not required to have visited the State.

Respondents were asked to rate each destination on the same 28 attributes they were asked to rate on general destination consideration. Using the same categorization, Chart 16 below shows how each destination was rated compared to the others and to the level of consideration for each category. Category details are presented in Table 2 below.

Chart 16: Consideration criteria and destination image ratings
% of total travelers high consideration when planning trip/% of total travelers destination high image ratings (6 & 7 on a 7-point scale)

Legend: Consideration | NJ Rating | NY Rating | PA Rating

Category	Consideration	NJ Rating	NY Rating	PA Rating
Quality/Value	57%	31%	38%	45%
Desirable Atmosphere	54%	43%	54%	34%
Outdoor Activities	42%	40%	57%	40%
Family Destination	39%	49%	39%	54%
Arts & Culture Activities	28%	30%	71%	47%
Entertainment	18%	48%	65%	33%

New Jersey receives the second highest ratings in all categories except Quality/Value and Arts & Culture Activities where it falls behind both New York and Pennsylvania. Compared to their importance when choosing a destination, New Jersey delivers very well as a Family Destination and as an Entertainment destination, due primarily due to its high image for gaming.

*Image of New Jersey's beaches and gaming is **better than the competition***

In terms of Quality/Value, the highest rated category when considering a destination, all three states fall short on high image ratings for this category. For New Jersey and New York these lower ratings are driven in part by low ratings of a Feeling of Safety and Friendliness of Residents. Pennsylvania's ratings are fairly consistent across all individual Quality/Value attributes, except for Scenic Beauty/Visual Appeal, which is the highest rated single Quality/Value attribute for the State.

The following table compares the detailed attribute ratings for New Jersey to the image ratings of New York and Pennsylvania. By far, the single attributes of beaches and gaming not only receive the highest image ratings for New Jersey, but they are rated higher for New Jersey than they are for the competition.

Table 3: Destination image ratings
% of travelers having high image ratings whether or not they have visited the destination
(6 & 7 points on a 7-point scale)

Attribute	NJ	NY	PA	Attribute	NJ	NY	PA
QUALITY/VALUE	31%	38%	45%	FAMILY DESTINATION	49%	39%	54%
Overall destination quality	34%	52%	44%	Good for family vacations	49%	39%	54%
Provides good value for the money	30%	22%	44%	OUTDOOR ACTIVITIES	40%	57%	40%
Ease of getting from place to place	31%	48%	38%	Outdoor sports/recreation facilities	39%	38%	48%
Provides a feeling of safety	28%	25%	43%	A fun/exciting place to visit	41%	74%	34%
Scenic beauty/visual appeal	34%	51%	54%	ARTS & CULTURE ACTIVITIES	30%	71%	47%
Inexpensive and available parking	26%	13%	41%	Live theater/music/concerts	35%	81%	31%
Information available on local sites/events	40%	63%	50%	Famous historical sites	29%	65%	66%
Friendliness of local residents	28%	26%	44%	Fairs, festivals and cultural events	29%	56%	43%
DESIRABLE ATMOSPHERE	43%	54%	34%	Art galleries, antiques/craft shops	24%	69%	37%
Restaurant experience	45%	80%	42%	Sightseeing	33%	81%	53%
Nice climate/weather	27%	24%	28%	ENTERTAINMENT	48%	65%	33%
Beaches/waterfront	63%	27%	12%	Popular, well-known place	44%	80%	45%
Luxury hotels and resorts	44%	77%	31%	Shopping	42%	72%	39%
Service at hotels, restaurants, etc.	43%	69%	39%	Gaming/casinos/horse racing	64%	21%	18%
Relaxing place to visit	38%	26%	46%	Night life	42%	78%	24%
A romantic place to visit	28%	51%	27%				
Good for adult vacation	54%	74%	43%				

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 who have actually visited New Jersey.

Chart 17: New Jersey image rating comparison
% of travelers having high image ratings whether or not they have visited New Jersey/% of New Jersey travelers
(6 & 7 points on a 7-point scale)

Legend: ■ NJ Rating - All Travelers   ■ NJ Rating - NJ Travelers

Attribute	NJ Rating - All Travelers	NJ Rating - NJ Travelers
Quality/Value	31%	39%
Desirable Atmosphere	43%	51%
Outdoor Activities	40%	48%
Family Destination	49%	59%
Arts & Culture Activities	30%	36%
Entertainment	48%	54%

The image of New Jersey among those who have visited in the past 12 months is higher than the total for all attributes measured, indicating a definite communications gap. The following lists specific areas with the largest gaps (at least 10 percentage points), where adequate product and service exist but where marketing communications can be improved.

- Overall destination quality
- Quality restaurant experiences
- A relaxing place to visit
- Good for family vacations

This list is shorter than in 2006 indicating that many of the gaps are being tightened. In addition, while a gap still exists between the perceptions of all travelers and New Jersey specific travelers, the gap between perceptions of New Jersey as providing a feeling of safety is shrinking.

Table 4: New Jersey image rating comparison
% of travelers having high image ratings whether or not they have visited New Jersey/% of New Jersey travelers
(6 & 7 points on a 7-point scale)

Attribute	All Traveler's Image of NJ	New Jersey Traveler's Image of NJ	Attribute	All Traveler's Image of NJ	New Jersey Traveler's Image of NJ
QUALITY/VALUE	**31%**	**39%**	**FAMILY DESTINATION**	**49%**	**59%**
Overall destination quality	34%	45%	Good for family vacations	49%	59%
Provides good value for the money	30%	38%	**OUTDOOR ACTIVITIES**	**40%**	**48%**
Ease of getting from place to place	31%	38%	Outdoor sports/recreation facilities	39%	46%
Provides a feeling of safety	28%	37%	A fun/exciting place to visit	41%	50%
Scenic beauty/visual appeal	34%	43%	**ARTS & CULTURE ACTIVITIES**	**30%**	**36%**
Inexpensive and available parking	26%	33%	Live theater/music/concerts	35%	42%
Information available on local sites/events	40%	46%	Famous historical sites	29%	35%
Friendliness of local residents	28%	34%	Fairs, festivals and cultural events	29%	36%
DESIRABLE ATMOSPHERE	**43%**	**51%**	Art galleries, antiques/craft shops	24%	28%
Restaurant experience	45%	55%	Sightseeing	33%	39%
Nice climate/weather	27%	36%	**ENTERTAINMENT**	**48%**	**54%**
Beaches/waterfront	63%	72%	Popular, well-known place	44%	52%
Luxury hotels and resorts	44%	51%	Shopping	42%	51%
Service at hotels, restaurants, etc.	43%	51%	Gaming/casinos/horse racing	64%	68%
Relaxing place to visit	38%	48%	Night life	42%	46%
A romantic place to visit	28%	36%			
Good for adult vacation	54%	61%			

DETAILED FINDINGS – Return-on-Investment (ROI)

How well is New Jersey doing at addressing the perception gaps and drawing visitors to the State?

In 2009 a television campaign was launched targeting some of the very activities for which there have been gaps. The campaign ran from March through June of 2009 and consisted of a series of television spots depicting people in different types of destinations and activities within New Jersey. Three of the 15 second spots were included in this study:

- Shore Family

- Nightlife & Entertainment

- Arts & Culture

The goal was to determine the level of awareness of the advertising by those residing in the target markets of New Jersey, York, Pennsylvania, Connecticut, Maryland Washington D.C., to determine if the

33% of all Ad Aware respondents visited New Jersey after seeing the 2009 TV ads

New and

campaign influenced those from the target markets to travel to New Jersey, and finally to determine the spending levels of those who actually visited to calculate the return-on-investment (ROI) realized by the campaign.

Respondents were asked a succession of questions from unaided recall (for what destinations have you seen advertising in 2009?) to aided recall (did you see advertising for any of the following destinations in 2009?) to destination specific questions (did you see any advertising for New Jersey in 2009?) to ad specific questions (did you see this ad for New Jersey in 2009?). For the ad specific questions respondents were shown a video of each of the three spots and asked whether or not they had seen it.

Those who had reported seeing at least one of the TV spots are considered **Ad Aware** respondents and were further asked to what degree the advertising had influenced their decision to visit New Jersey. Those who were determined to be influenced by the ads are referred to as **Ad Aware Influenced**. Ad Aware respondents were also asked whether or not they had visited New Jersey since seeing the ads. Depending on whether or not they were determined to be influenced by the ads, these respondents are referred to as either **Ad Aware Visitors** or **Ad Aware Influenced Visitors**.

When respondents were asked to list cities, states or destinations for which they have seen advertising, New Jersey was the 7th most cited. Among a list of eight destinations, New Jersey was the third most selected and when asked about New Jersey specifically, over half of the respondents reported having seen New Jersey advertising in 2009.

Reported awareness of each of the three TV ads varied by ad. Twenty percent of all respondents and 68% of Ad Aware respondents reported having seen the Shore Family ad followed by the Nightlife & Entertainment ad, which was seen by 44% of ad aware respondents and 27% of ad aware respondents remembered seeing the Arts & Culture ad. These findings are consistent with New Jersey's high image ratings for beaches and gaming.

Table 4: Ranking of New Jersey ad recall
% of all travelers

Unaided (98% responding)	Aided (90% responding)
Florida	New York
Nevada	Pennsylvania
New York	**New Jersey**
California	Massachusetts
Pennsylvania	Washington, D.C.
Virginia	Maryland
New Jersey	Connecticut
Massachusetts	Michigan
Maryland	Other
Hawaii	None

Shore Family TV spot is most seen ad

Those who had actually visited New Jersey since seeing the advertising were asked a series of questions about their trip including how much money they spent for local transportation, lodging, meals, entertainment, shopping and for miscellaneous expenses.

Of the 2,007 respondents included in this study 29% had reported seeing New Jersey TV advertising in 2009. Of these 19% were influenced by the ads to visit New Jersey and 41% of these had actually visited New Jersey after seeing the TV spots and being influenced by them to do so.

Incremental spending in New Jersey by Ad Aware and Influenced Visitors from the target markets was $676 million. This estimate was produced by multiplying the 5.65 million targeted households who had reported seeing the TV advertisements (Ad Aware) by average New Jersey Ad Aware/Influenced/Visited conversion rate of 7.55%. The outcome was then multiplied by average party per trip spending of $1,584.

New Jersey's 2009 Advertising campaign generated $676 million in incremental spending and an ROI of $315 : $1

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Based on a client-supplied marketing campaign investment of $2,148,326, the direct spending revenue return-on-investment is $314.60 : $1. That is, on average, for every dollar spent on the 2009 advertising campaign, the campaign generated $314.60 in visitor direct spending.

Table 5: Return-on-Investment Calculation

A	2008 Population of Households in CT, MD, NJ, NY, PA, DC – U.S. Census Bureau	48,781,778
B	2008 Traveling Households in CT, MD, NJ, NY, PA, DC, - DKSA *Performance* Data	39.55%
C	Estimated number of 2009 traveling households from CT, MD, NJ, NY, PA, DC	19,293,193
D	% Aware of 2009 Campaign (Ad Aware)	29.30%
E	Ad aware Households (C x D)	5,652,906
F	% Aware of 2009 campaign and Influenced to travel (Ad Aware Influenced)	18.50%
G	Ad Aware Influenced Households (E x F)	1,045,788
H	% Aware of 2009 campaign, Influenced to travel and Visited (Ad Aware Influenced/Visited)	40.80%
I	Ad Aware Influenced/Visited Households (Converted Households) (G x H)	426,681
J	Conversion Rate (Ad Aware Households) (I/E)	7.55%
K	Average Party Size	3.8
L	Incremental Visitors (I x K)	1,621,389
M	Average Spending Per Party Per Trip	$1,584
N	Incremental Per Party Per Trip Spending (I x M)	$675,863,203
O	Total Advertising Spend	$2,148,326
P	**ROI (N/O)**	**$314.60**

This ROI calculation is conservative by design in several ways:

- The ROI estimate includes only those from "targeted" households – adults 18 years or older residing in New Jersey, New York, Pennsylvania, Connecticut, Maryland and Washington D.C.

- ROI calculations are generated using a very conservative definition of Ad Awareness, namely confirmed Ad Awareness using actual videos of the ads embedded in the online survey. They were asked if these were the ads they recall having seen.

- ROI calculations use a very conservative definition of *ad-influence*, namely, either the respondent: 1) was not at all considering and is now very much considering visiting New Jersey, or 2) was considering AND the marketing definitely influenced their interest in visiting New Jersey.

- ROI calculations exclude additional spending and taxes generated from multiple visits, including those produced during the campaign time frame, and those visits occurring beyond the survey time frame.

DETAILED FINDINGS – Intent to Return and Recommend

What is the likelihood of those who have visited each of the States to make a return visit or to recommend the State to others?

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

Although New Jersey scored lowest for intent to return, over two-thirds of New Jersey visitors (68%) indicated that they would return to the State for a leisure trip (6 & 7 on a 7 point scale). This is almost the same as reported in the 2006 study (69%).

While a large portion of New Jersey visitors plan to return to the State, a smaller share would recommend it to family or friends (40%). This represents a large drop from 2006 in which 61% of New Jersey visitors said they would recommend the State. 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 18: Intent to return and recommend
% of travelers that would return to state/% of travelers that would recommend state to friends or family
(6 & 7 on a 7-point scale)

Legend: ■ NJ Visitors ■ NY Visitors □ PA Visitors

Would Return: NJ Visitors 68%, NY Visitors 78%, PA Visitors 73%

Would Recommend: NJ Visitors 40%, NY Visitors 48%, PA Visitors 37%
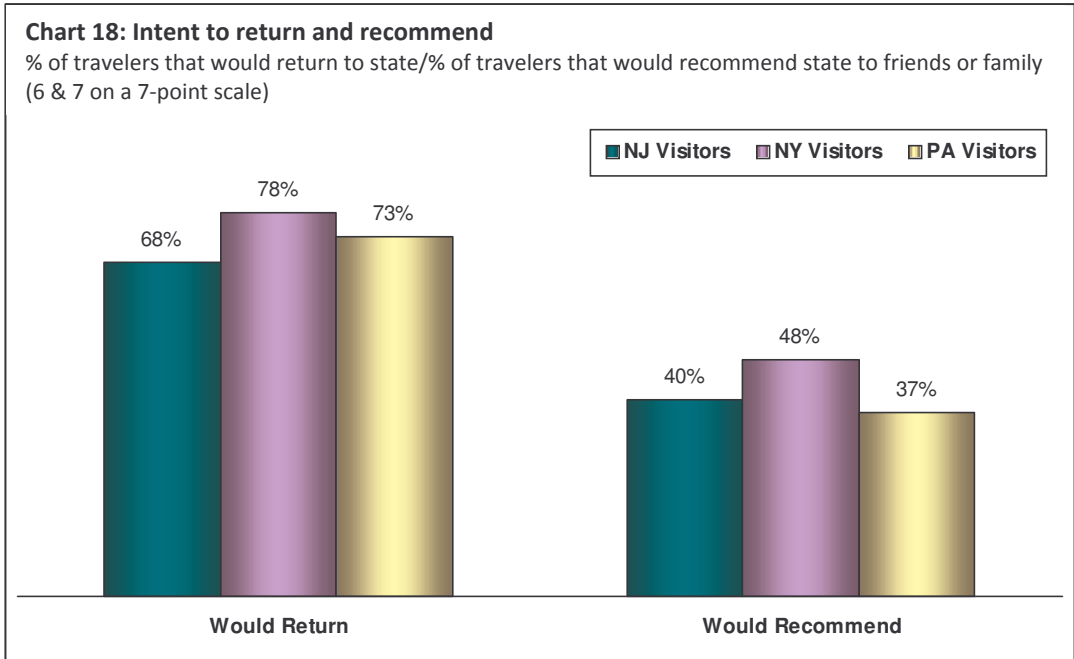
CONCLUSIONS & RECOMMENDATIONS

Travel Purpose & Considerations

There appears to be a shift away from connecting with others to a focus on the self. Travelers from New Jersey's target region want to reduce stress as much as they did in 2006. And, while the percentage of those who travel to get re-energized is about the same, it has moved from being essentially tied with reconnecting with friends and family to the number two position by 7 percentage points. Promote the relaxing, rejuvenating aspects of a New Jersey visit, whether it be a getaway weekend at a spa or an extended vacation at the beach.

Trip Planning

New Jersey visitors plan trips in shorter time frames than do travelers in general and somewhat shorter than travelers to New York or Pennsylvania. Promotions extending more into the future may help attract more long term planners.

New Jersey visitors are not using online planning resources to the degree visitors to New York and Pennsylvania are. It is important to increase promotion and utility of:

- Internet search websites (Google, Yahoo, etc.)
- State travel website

Referrals from friends and family continues to be the resource New Jersey visitors most often use to get their travel information. For New Jersey, unlike New York and Pennsylvania, these referrals exceed use of Internet search sites. As such, destinations need to influence that message with:
- Excellent customer service
- Visitor follow-up
- Messaging and materials for New Jersey residents hosting visitors

The Internet continues to be the top, non-human, source for travel information
- Promote availability and usefulness of www.visitnj.org
- Strategic linking of www.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

Visitnj.org's satisfaction ratings have improved against the competitive websites as well as to ratings received in 2006 (35% vs. 21% satisfaction). This can be boosted even further by continuing to:

- Seek out and evaluate best practices. Look outside the competitive set for best practices among the destination marketing organizations nationwide, particularly now that satisfaction with visitnj.org has surpassed New York and Pennsylvania
- Consider in-depth research of www.visitnj.org for content and usability
- Ongoing evaluation of website capabilities

Destination Awareness & Image

Some of New Jersey's key cultural, historic, and outdoor recreation destinations continue to have the lowest share of awareness. Similarly, these types of activities also received a lower share of participation. Activity participation patterns are similar for New York and Pennsylvania as well.

Marketing activities seem to be working for the strong awareness attractions. Continue to augment marketing efforts for lesser-known attractions and in-state destinations.
- In-market promotions for nearby cultural, historic, and outdoor recreation attractions
- Call to action to revisit the lesser-known attractions and destinations
- Develop suggested itineraries that combine strong awareness of attractions and destinations with those of lower awareness

Those who have visited New Jersey have a higher image of New Jersey than travelers in general. Address the misperceptions by:

- Highlighting what your visitors already know and for which there are the largest communication gaps
    - o Overall destination quality
    - o Restaurant experiences
    - o Relaxing place to visit
    - o Good for family vacations
    - o Feeling of safety
    - o Scenic beauty/visual appeal
    - o Beaches/waterfront
    - o Fun/exciting place to visit
    - o Shopping

- Educate your current and potential visitors on what they don't know about New Jersey's cultural, historic, and outdoor recreation destinations and activities.

Advertising Return-on-Investment (ROI)

Twenty-nine percent of travelers from the target market reported seeing the television advertising that appeared from March through June 2009. The campaign was successful in generating $646 million in incremental spending and an impressive ROI of $315:1. Increasing advertising awareness and related visitation will add positively to the ROI.

APPENDIX

Survey Methodology

Survey instrument: A survey of approximately 30 minutes in length.

Method: on-line survey

Sampling frame: e-Rewards consumer opinion on-line panel members residing in the States of New Jersey, New York, Pennsylvania, Connecticut, Maryland and Washington, D.C. Qualified respondents took a leisure of any length in the past 12 months or planned to take a leisure trip in the next 12 months.

Timeframe: The advertising campaign ran from March through June 2009. The study was conducted the third week of September 2009.

Sample Size: A total of 2,000 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 2,000 as respondents could have taken a trip to multiple states.

     NJ =   875
     NY = 1,067
     PA =   956

Response Rate: This sample was based on a representative quota of 2,000 completed surveys from the survey geography (New Jersey, New York, Pennsylvania, Connecticut, Maryland, Washington, D.C.). Calculation of a response rate is not appropriate when using quota sampling.

Data Processing: Survey respondents were weighted by the following factors to maintain a balanced and representative sample
- Origin state
- Gender
- Household Income

Data analysis was conducted with cross-tabulations.

Statistical Testing

Table 6 below shows the confidence interval level corresponding to the combination of various travel segments reported in this study and several response finding percentages.
The confidence interval table indicates how well the data—based on a *sample*—reflects the entire *population* of respondents. The smaller the interval, the more "accurate" the data and the greater confidence we have that the sample number represents the population. For example, if the finding for New Jersey Visitors is 50%—using the chart below—we are 90 percent confident that the actual proportion for the population is 50% plus or minus 2.8 percentage points (it could range from 47.2% percent to 52.8%).

DKSA uses a 90% confidence level because—for consumer marketing research purposes—it represents a better trade-off than higher confidence levels between the two complementary types of sampling error issues—that is, 1) <u>accepting</u> a difference between two groups or two years as statistically different...a real change...when it is in fact NOT a real change, and 2) <u>rejecting</u> the difference as a real change, when it IS in fact a real change (in statistical terms, this is the statistical tradeoff between a **Type I** and a **Type II** level sampling error).

Chart 6: Confidence Intervals

		Percentage Finding from the Study				
	Sample Size	**0% to 2% or 98% to 100%**	**2% to 5% or 95% to 98%**	**5% to 10% or 90% to 95%**	**10% to 25% or 75% to 90%**	**50%**
Total	2,007	0.4%	0.7%	1.0%	1.4%	1.8%
New Jersey Visitors	875	0.6%	1.0%	1.5%	2.1%	2.8%
New York Visitors	1,067	0.5%	0.9%	1.3%	1.9%	2.5%
Pennsylvania Visitors	956	0.5%	1.0%	1.4%	2.0%	2.7%
Ad Aware	593	0.7%	1.2%	1.8%	2.6%	3.4%
Ad Aware Influenced	110	1.6%	2.9%	4.1%	5.9%	7.8%
Ad Aware Influenced Visitor	46	2.4%	4.4%	6.4%	9.2%	12.1%

SURVEY QUESTIONS

SCREENERS

Q1. Have you or anyone in your household **taken** one or more leisure trips of any length in the last 12 months?

❑ Yes

❑ No

❑ Don't Know/Don't Remember

Q2. Do you or does anyone in your household **plan to take** a leisure trip of any length in the next 12 months?

❑ Yes

❑ No

❑ Don't Know/Don't Remember

[Asked of all respondents]
[**Qualify** = if Q1 = Yes or Q2 = Yes]
[If No, DK/Don't Remember to BOTH Q1 and Q2, terminate

ROI Questions

Q3. In the spaces below, please type in the names of all cities and/or states and destinations to which you would **consider visiting** for a leisure trip in the next 12 months.

Please include the state for each city you specify.

City	State	Destination

[At least one response is mandatory]
[If "City" is entered, state is mandatory]
[If "State" or "Destination" city or state is not required]

Q4. In the spaces below, please type in all cities and/or destinations for which you have **seen or heard travel advertising** in magazines, in newspapers, on TV, on billboards, on the radio, or on the internet this year (2009).

Please include the state for each city you specify.

City	State	Destination

[At least one response is mandatory]
[If "City" is entered, state is mandatory]
[If "State" or "Destination" city or state is not required]

Q5. Thinking about advertising you've seen for various travel destinations this year (2009), which of the following cities and/or states do you recall **seeing any advertising** for in magazines, newspapers, on TV, on billboards, on the radio or on the Internet?

Please select all that apply.

❑ Connecticut

❑ Maryland

❑ Massachusetts

❑ Michigan

❑ New Jersey

❑ New York

❑ Pennsylvania

❑ Washington, DC

❑ Other

❑ None

[Allow multi-responses for all but "None"]
["None" is mutually exclusive]
[If "New Jersey" chosen here, populate Q6 "Yes" and go to Q7]

Q6. Have you seen or heard any magazine, newspaper, TV, billboard, radio or Internet advertising for **New Jersey** this year (2009)?

❑ Yes

❑ No

❑ Don't Know/Don't Remember

[Ask if New Jersey NOT chosen in Q5]
[If "New Jersey" chosen in Q5, populate Q6 "Yes" and go to Q7]
[If "No" or "Don't Know/Don't Remember" skip to Q8]

Q7. You mentioned you have seen or heard advertising for **New Jersey** this year (2009). Where did you see or hear the **New Jersey** advertising?

Please select ALL that apply.

- ❑ In a magazine
- ❑ On a website/internet banner ad
- ❑ In a newspaper
- ❑ On television
- ❑ On a billboard
- ❑ On the radio
- ❑ Other
- ❑ Don't know/Don't remember

[Ask only those who responded "New Jersey" in Q5 and "Yes" in Q6]
[Allow multi-response, except Don't know/Don't remember]
[Don't know/Don't remember is mutually exclusive]

In the next section we are now going to show you examples of destination advertising, after which we will ask you some additional questions.

[There will be three 15 second TV spots. Every respondent will see all three spots. Spots and associated question should be presented in random order, but each respondent should see all three spots.
Q8 will be asked after respondent views EACH spot – Q8A-Q8C]

[Show "Shore Family" TV spot]

Q8A. Have you seen this ad on TV this year (2009)?

❑ Yes

❑ No

❑ Don't Know/Don't Remember

[**AD AWARE** = If "Yes" to one or more spots – Q8A and/or Q8B and/or Q8C or select New Jersey in Q5.
[If not Ad Aware skip to Q15]
[If "Yes" to seeing any New Jersey ads, populate Q6 as "Yes"]

Q8B. Have you seen this ad on TV this year (2009)?

❑ Yes

❑ No

❑ Don't Know/Don't Remember

[**AD AWARE** = If "Yes" to one or more spots – Q8A and/or Q8B and/or Q8C or select New Jersey in Q5.
[If not Ad Aware skip to Q15]
[If "Yes" to seeing any New Jersey ads, populate Q6 as "Yes"]

[Show "Arts & Culture" TV spot]

Q8C. Have you seen this ad on TV this year (2009)?

❑ Yes

❑ No

❑ Don't Know/Don't Remember

[**AD AWARE** = If "Yes" to one or more spots – Q8A and/or Q8B and/or Q8C or select New Jersey in Q5.
[If not Ad Aware skip to Q15]
[If "Yes" to seeing any New Jersey ads, populate Q6 as "Yes"]

Q9. On a scale of 1 to 7, where 1 is "No Influence" and 7 is "A Great Deal of Influence", overall, how strongly were you influenced by the New Jersey advertising you saw in considering New Jersey for a leisure trip?

No Influence						Great Deal of Influence
1	2	3	4	5	6	7
●	●	●	●	●	●	●

Q10. Which of the following statements most applies to you?

Please select only one.

❑ I was definitely planning a New Jersey leisure trip anyway within the next year, prior to seeing the New Jersey advertising

❑ I was considering New Jersey leisure trip within the next year prior to seeing the New Jersey advertising and the advertising I saw helped me make the decision to go

❑ I was not considering a New Jersey leisure trip within the next year, but the New Jersey advertising I saw sparked an interest and I have decided to now take a leisure trip to New Jersey as a result of seeing the advertising

❑ I was not considering New Jersey leisure trip within the next year, but I might possibly plan a trip next year or sometime in the future

❑ I do not plan on visiting New Jersey in the future.

Q11. Was the New Jersey advertising you saw the deciding factor in your decision to visit New Jersey?

❑ Yes

❑ No

❑ Don't Know/Don't Remember

[Ask if responded to second response option in Q10]

Q12. Did you visit New Jersey for leisure purposes since seeing the New Jersey destination advertising this year (2009)?

❑ Yes

❑ No

❑ Not yet but planning to visit in the next 12 months

[If no/not yet, skip to Q15]

Q13. Including yourself, how many people were in your immediate travel party on your most recent leisure trip to New Jersey in 2009?

Type in number in travel party.

14. Approximately how much did you and others in your immediate travel party spend in New Jersey during your most recent leisure trip in 2009 for lodging, food and beverage, entertainment, shopping, local transportation and other miscellaneous purchases?

If nothing was spent in a particular category, please type in "$0".

	$
Lodging	
Food and Beverage	
Entertainment (attractions, movies, golf, etc.)	
Shopping	
Local Transportation (rental car, gasoline, taxi, bus, etc.)	
Other	
Total	

[Sum amounts so respondent can see total]

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

Q15. Thinking about your usual reasons for taking a leisure trip to *any* destination, using the scale below, where 1 is not at all important and 7 is extremely important, please rate how important each of the following reasons is in your decision to select a leisure destination.

Please rate each reason.

	Not at all Important						Extremely Important
	1	2	3	4	5	6	7
Learn something new	●	●	●	●	●	●	●
Engage in physically challenging activities	●	●	●	●	●	●	●
Reduce stress	●	●	●	●	●	●	●
Experience excitement	●	●	●	●	●	●	●
Experience a sense of adventure	●	●	●	●	●	●	●
Solitude	●	●	●	●	●	●	●
Reconnect with myself/spirit	●	●	●	●	●	●	●
To get re-energized	●	●	●	●	●	●	●
Reconnect with friends or family	●	●	●	●	●	●	●

[Randomize list]

Q16. The next few questions list various characteristics people consider when choosing a place to visit for a leisure trip.

Q16a. On a scale of 1 (not at all important) to 7 (extremely important), please rate how important each characteristic is to you in choosing a destination for a leisure trip.

Please rate each characteristic.

	Not at all Important						Extremely Important
	1	2	3	4	5	6	7
Overall destination quality	●	●	●	●	●	●	●
Provides good value for the money	●	●	●	●	●	●	●
Nice climate/weather	●	●	●	●	●	●	●
Provides a feeling of safety	●	●	●	●	●	●	●
Overall scenic beauty/visual appeal	●	●	●	●	●	●	●
Popular, well-known place	●	●	●	●	●	●	●
Ease of getting from place to place	●	●	●	●	●	●	●
Available and affordable parking	●	●	●	●	●	●	●
Availability of information on local sites/events	●	●	●	●	●	●	●
Friendliness of local residents	●	●	●	●	●	●	●

Q16b. On a scale of 1 (not at all important) to 7 (extremely important), please rate how important each characteristic is to you in choosing a destination for a leisure trip.

Please rate each characteristic.

	Not at all Important						Extremely Important
	1	2	3	4	5	6	7
Quality restaurant experiences	●	●	●	●	●	●	●
Quality shopping	●	●	●	●	●	●	●
Gaming (i.e. casinos/horse racing)	●	●	●	●	●	●	●
Live theater/music/concerts	●	●	●	●	●	●	●
Famous historical sites	●	●	●	●	●	●	●
Fairs, festivals & cultural events	●	●	●	●	●	●	●
Art galleries, antique/craft shops	●	●	●	●	●	●	●
Sightseeing	●	●	●	●	●	●	●
Outdoor sports/recreation (i.e. camping, fishing, golf, boating/water sports)	●	●	●	●	●	●	●
Night Life (entertainment)	●	●	●	●	●	●	●

Q16c. On a scale of 1 (not at all important) to 7 (extremely important), please rate how important each characteristic is to you in choosing a destination for a leisure trip.

Please rate each characteristic.

	Not at all Important						Extremely Important
	1	2	3	4	5	6	7
Beaches/waterfront	●	●	●	●	●	●	●
Luxury hotels/resorts	●	●	●	●	●	●	●
Quality service at hotels, restaurants, etc.	●	●	●	●	●	●	●
A relaxing place to visit	●	●	●	●	●	●	●
Good for family vacations	●	●	●	●	●	●	●
A romantic place to visit	●	●	●	●	●	●	●
Good for adult vacation	●	●	●	●	●	●	●
A fun/exciting place to visit	●	●	●	●	●	●	●

Q17. About how far in advance do you plan a leisure **Vacation** trip?

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

Q18. About how far in advance do you plan a leisure **Weekend Getaway** trip?

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

Q19. Have you traveled to New Jersey, New York or Pennsylvania for a leisure trip in the *past 12 months* or do you plan to take a leisure trip to any of these states in the *next 12 months*?

Please choose one response for each state.

	New Jersey	New York	Pennsylvania
Have **traveled** to or within in past 12 months	●	●	●
Plan to travel to or within in next 12 months	●	●	●
Have **not taken** nor plan to take a leisure trip in last/next 12 months	●	●	●

[Must answer for each state – at least one of first 2 responses – both are allowed]

[If respondent answered "YES" to Q12, must answer "Have traveled to or within in past 12 months" for New Jersey]

[For each state, can not choose "not taken" if choose either of first two options]

[If option 3 selected for all three states, skip to Q33]

[If *traveled* **only** to all 3 states, randomly select 1 and insert into Q22A]

[If *plan to travel* **only** to all 3 states, randomly select 1 and insert into Q22B]

[If *traveled* **and** *plan to travel* to same state and only one state, select travel and insert into 22A]

[If more than 1 state qualifies (traveled and/or plan to travel), randomly select and insert into either Q22A or Q22B, whichever is appropriate]

Q20. Have you ever **heard of** any of the destinations or attractions listed below?

Please provide a response for each destination or attraction.

	YES, have heard of	NO, have not heard of
Atlantic City	○	○
Cape May	○	○
Wildwood	○	○
Long Beach Island	○	○
Liberty State Park/Science Center	○	○
Mountain Creek	○	○
Monmouth Park	○	○
Meadowlands Sports Complex	○	○
Camden Aquarium	○	○
Statue of Liberty/Ellis Island	○	○
Lambertville	○	○
Delaware Water Gap	○	○
Point Pleasant	○	○
Jersey Gardens	○	○
Jockey Hollow, Washington Crossing	○	○
Six Flags Great Adventure	○	○
Wheaton Village	○	○
New Jersey Performing Arts Center	○	○

[Must answer for each destination or attraction]
[Q21 will be populated with "Yes" destinations/attractions]

Q21. You indicated that you had heard of the destinations/attractions listed below. Which one have you actually **visited**?

Please provide a response for each destination or attraction.

	YES, have visited	NO, have never visited
	○	○
	○	○
	○	○
	○	○
	○	○
	○	○
	○	○
	○	○
	○	○
	○	○
	○	○
	○	○
	○	○
	○	○
	○	○
	○	○
	○	○
	○	○

[First column should be populated with "Yes" responses from Q20]
[Must answer for each destination/attraction]

You indicated that you took a trip or plan to take a trip to [Insert Response from Q19]. The following questions will ask you about [Insert Response from Q19], specifically. If you have taken more than one trip to [Insert Response from Q19] in the past 12 months, please answer for your most recent trip.

[From Q19, insert state for which trip is being planned or has been taken]
[If more than one state qualifies randomly select]
[Ask A or B options of the questions 22-28 depending on response to Q19 – have traveled, plan to travel]

22A. You indicated that you **took a trip** to [Insert Response from Q19] in the past 12 months, about how far in advance did you start to plan it?

Please select one response.

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

[Ask 22A if response for State in Q19 is "have traveled to or within"

22B. You indicated that you are **planning to take a trip** to [Insert Response from Q19] in the next 12 months, about how far in advance will you start planning it?

Please select one response.

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

[Ask 22b if response for State in Q19 is "plan to travel"]

23A. How long did you stay in [Insert Response from Q19] on your **most recent trip** there?

Please select one response.

- ❑ 1 day (did not stay overnight)
- ❑ 1-3 nights
- ❑ 4 or more nights

[Ask 23A if response for State in Q19 is "have traveled to or within"]

23B. If your are **planning** to take a trip to **[**Insert Response from Q19**]** in the next 12 months, how long do you plan to stay?

Please select one response.

- ❑ 1 day (did not stay overnight)
- ❑ 1-3 nights
- ❑ 4 or more nights

[Ask 23B if response for State in Q19 is "plan to travel"]
[Skip to 23B]

24. How many **leisure day trips** you have taken to [Insert Response from Q19 "traveled"] in the past 12 months?

Please select one response.

- ❑ 0 trips
- ❑ 1 trip
- ❑ 2-3 trips
- ❑ 4 or more trips

25A. Please indicate which sources of information you **used** in planning your trip to [Insert Response from Q19].

Please indicate whether or not you used each source.

Sources of Travel Information	Used	Did Not Use
State website [replace with www.visitnj.org for NJ version]	○	○
Purchased [Insert Response from Q19] Guide Book	○	○
Published Event Calendar	○	○
State toll-free number [replace with 1-800-VISITNJ for NJ version]	○	○
Hotel/Lodging website	○	○
Internet Travel Booking (e.g. Orbitz/Travelocity, etc.)	○	○
Travel Agent	○	○
Rental Real Estate Agent	○	○
Internet Search site (Google, Yahoo, etc.)	○	○
Friends/Family Recommendation	○	○

25B. Please indicate which sources of information you **plan to use** in planning your trip to [Insert Response from Q19].

Please indicate whether or not you plan to use each source.

Sources of Travel Information	Plan to Use	Do Not Plan to Use
State website [replace with www.visitnj.org for NJ version]	○	○
Purchased [Insert Response from Q19] Guide Book	○	○
Published Event Calendar	○	○
State toll-free number [replace with 1-800-VISITNJ for NJ version]	○	○
Hotel/Lodging website	○	○
Internet Travel Booking (e.g. Orbitz/Travelocity, etc.)	○	○
Travel Agent	○	○
Rental Real Estate Agent	○	○
Internet Search site (Google, Yahoo, etc.)	○	○
Friends/Family Recommendation	○	○

[Skip to Q27B]

26. For each of the information sources you **used** in planning your trip to [Insert Response from Q19], please rate how well it met your expectations.

Please rate each information source you used.

Sources of Travel Information	Far Below Expectations 1	2	3	4	5	6	Far Exceeded Expectations 7
	●	●	●	●	●	●	●
	●	●	●	●	●	●	●
	●	●	●	●	●	●	●
	●	●	●	●	●	●	●
	●	●	●	●	●	●	●
	●	●	●	●	●	●	●
	●	●	●	●	●	●	●
	●	●	●	●	●	●	●
	●	●	●	●	●	●	●
	●	●	●	●	●	●	●

[First column should be populated with "Used" responses from Q24A]
[Must answer for each source of information]

27A. Please indicate each activity you **participated** in during your most recent visit to [Insert Response from Q19].

Check all that apply.

Touring/sightseeing	●	Golf	●
Look at real estate	●	Hike, bike, etc.	●
Visit historic site	●	Visit health spa/resort	●
Visit museum, art exhibit, etc.	●	Visit beach/lake/river/waterfront	●
Attend festival, craft fair, etc.	●	Boating/sailing/kayaking/water skiing	●
Night life (entertainment)	●	Attend show: boat, care, home, etc.	●
Gaming, horse/dog racing	●	Visit theme/amusement park	●
Attend sporting event	●	Shopping	●
Dining out/experiencing local cuisine	●	Browse antique/craft shops	●
Attend live theater/performing arts/concerts	●	None listed	●

[Randomize list EXCEPT "None listed" – this should remain in last position of second column]

27B. Please indicate the activities you **plan to participate** in during your upcoming visit to [Insert Response from Q19].

Check all that apply.

Touring/sightseeing	●	Golf	●
Look at real estate	●	Hike, bike, etc.	●
Visit historic site	●	Visit health spa/resort	●
Visit museum, art exhibit, etc.	●	Visit beach/lake/river/waterfront	●
Attend festival, craft fair, etc.	●	Boating/sailing/kayaking/water skiing	●
Night life (entertainment)	●	Attend show: boat, care, home, etc.	●
Gaming, horse/dog racing	●	Visit theme/amusement park	●
Attend sporting event	●	Shopping	●
Dining out/experiencing local cuisine	●	Browse antique/craft shops	●
Attend live theater/performing arts/concerts	●	None listed	●

[Randomize list EXCEPT "None listed" – this should remain in last position of second column]

28A. Below are the activities you indicated you **participated** in on your most recent visit to [Insert Response from Q19]. Please indicate each activity that was an important reason for your visit.

Check all that apply.

	●		●
	●		●
	●		●
	●		●
	●		●
	●		●
	●		●
	●		●
	●		●
	●	None listed	●

[First column should be populated with checked responses from Q27A and "None Listed"]

28B. Below are the activities you indicated you **plan to participate** in on your planned visit to [Insert Response from Q19]. Please indicate each activity that is an important reason for your visit.

Check all that apply.

	●		●
	●		●
	●		●
	●		●
	●		●
	●		●
	●		●
	●		●
	●		●
	●	None listed	●

[First column should be populated with checked responses from Q27B and "None Listed"]

i29. The next three screens list various characteristics for New Jersey.

29A. Based on everything you have seen, heard or experienced about New Jersey, please provide your **impression** of how well New Jersey delivers on each of the characteristics listed below, *even if you have never visited New Jersey*.

Please rate each characteristic. Remember you need not have visited to have an **impression**.

	Does Not Deliver						Delivers Extremely Well	No Impression
	1	2	3	4	5	6	7	
Overall destination quality	●	●	●	●	●	●	●	●
Provides good value for the money	●	●	●	●	●	●	●	●
Nice climate/weather	●	●	●	●	●	●	●	●
Provides a feeling of safety	●	●	●	●	●	●	●	●
Overall scenic beauty/visual appeal	●	●	●	●	●	●	●	●
Popular, well-known place	●	●	●	●	●	●	●	●
Ease of getting from place to place	●	●	●	●	●	●	●	●
Available and affordable parking	●	●	●	●	●	●	●	●
Availability of information on local sites/events	●	●	●	●	●	●	●	●
Friendliness of local residents	●	●	●	●	●	●	●	●

29B. Based on everything you have seen, heard or experienced about New Jersey, please provide your **impression** of how well New Jersey delivers on each of the characteristics listed below, *even if you have never visited New Jersey*.

Please rate each characteristic. Remember you need not have visited to have an **impression**.

	Does Not Deliver						Delivers Extremely Well	No Impression
	1	2	3	4	5	6	7	
Quality restaurant experiences	●	●	●	●	●	●	●	●
Quality shopping	●	●	●	●	●	●	●	●
Gaming (i.e. casinos/horse racing)	●	●	●	●	●	●	●	●
Live theater/music/concerts	●	●	●	●	●	●	●	●
Famous historical sites	●	●	●	●	●	●	●	●
Fairs, festivals & cultural events	●	●	●	●	●	●	●	●
Art galleries, antique/craft shops	●	●	●	●	●	●	●	●
Sightseeing	●	●	●	●	●	●	●	●
Outdoor sports/recreation (i.e. camping, fishing, golf, boating/water sports)	●	●	●	●	●	●	●	●
Night Life (entertainment)	●	●	●	●	●	●	●	●

29c. Based on everything you have seen, heard or experienced about New Jersey, please provide your **impression** of how well New Jersey delivers on each of the characteristics listed below, *even if you have never visited New Jersey*.

Please rate each characteristic. Remember you need not have visited to have an **impression**.

	Does Not Deliver						Delivers Extremely Well	No Impression
	1	2	3	4	5	6	7	
Beaches/waterfront	●	●	●	●	●	●	●	●
Luxury hotels/resorts	●	●	●	●	●	●	●	●
Quality service at hotels, restaurants, etc.	●	●	●	●	●	●	●	●
A relaxing place to visit	●	●	●	●	●	●	●	●
Good for family vacations	●	●	●	●	●	●	●	●
A romantic place to visit	●	●	●	●	●	●	●	●
Good for adult vacation	●	●	●	●	●	●	●	●
A fun/exciting place to visit	●	●	●	●	●	●	●	●

I30. The next three screens list various characteristics for [Insert Destination Name].

30A. Based on everything you have seen, heard or experienced about [Insert Destination Name] please provide your **impression** of how well [Insert Destination Name] delivers on each of the characteristics listed below, *even if you have never visited [Insert Destination Name]*.

Please rate each characteristic. Remember you need not have visited to have an **impression**.

	Does Not Deliver						Delivers Extremely Well	No Impression
	1	2	3	4	5	6	7	
Overall destination quality	●	●	●	●	●	●	●	●
Provides good value for the money	●	●	●	●	●	●	●	●
Nice climate/weather	●	●	●	●	●	●	●	●
Provides a feeling of safety	●	●	●	●	●	●	●	●
Overall scenic beauty/visual appeal	●	●	●	●	●	●	●	●
Popular, well-known place	●	●	●	●	●	●	●	●
Ease of getting from place to place	●	●	●	●	●	●	●	●
Available and affordable parking	●	●	●	●	●	●	●	●
Availability of information on local sites/events	●	●	●	●	●	●	●	●
Friendliness of local residents	●	●	●	●	●	●	●	●

30B. Based on everything you have seen, heard or experienced about [Insert Destination Name] please provide your **impression** of how well [Insert Destination Name] delivers on each of the characteristics listed below, *even if you have never visited [Insert Destination Name]*.

Please rate each characteristic. Remember you need not have visited to have an **impression**.

	Does Not Deliver						Delivers Extremely Well	No Impression
	1	2	3	4	5	6	7	
Quality restaurant experiences	●	●	●	●	●	●	●	●
Quality shopping	●	●	●	●	●	●	●	●
Gaming (i.e. casinos/horse racing)	●	●	●	●	●	●	●	●
Live theater/music/concerts	●	●	●	●	●	●	●	●
Famous historical sites	●	●	●	●	●	●	●	●
Fairs, festivals & cultural events	●	●	●	●	●	●	●	●
Art galleries, antique/craft shops	●	●	●	●	●	●	●	●
Sightseeing	●	●	●	●	●	●	●	●
Outdoor sports/recreation (i.e. camping, fishing, golf, boating/water sports)	●	●	●	●	●	●	●	●
Night Life (entertainment)	●	●	●	●	●	●	●	●

30c. Based on everything you have seen, heard or experienced about [Insert Destination Name] please provide your **impression** of how well [Insert Destination Name] delivers on each of the characteristics listed below, *even if you have never visited [Insert Destination Name]*.

Please rate each characteristic. Remember you need not have visited to have an **impression**.

	Does Not Deliver						Delivers Extremely Well	No Impression
	1	2	3	4	5	6	7	
Beaches/waterfront	●	●	●	●	●	●	●	●
Luxury hotels/resorts	●	●	●	●	●	●	●	●
Quality service at hotels, restaurants, etc.	●	●	●	●	●	●	●	●
A relaxing place to visit	●	●	●	●	●	●	●	●
Good for family vacations	●	●	●	●	●	●	●	●
A romantic place to visit	●	●	●	●	●	●	●	●
Good for adult vacation	●	●	●	●	●	●	●	●
A fun/exciting place to visit	●	●	●	●	●	●	●	●

[END for those who responded other than "have traveled" in Q19.]

Q31. On a scale of 1 (definitely will not return) to 7 (definitely will return), please rate your intent to return to [New Jersey or Selected Destination] for a leisure trip.

Definitely Will *Not* Return						Definitely *Will* Return
1	2	3	4	5	6	7
●	●	●	●	●	●	●

[Randomly select between destinations used in Q29 and Q30]

Q32. On a scale of 1 (definitely would recommend) to 7 (definitely would not recommend), would you recommend [Insert Destination in Q31] as a leisure vacation destination to a friend or relative?

Definitely *Would* Recommend						Definitely *Would Not* Recommend
1	**2**	**3**	**4**	**5**	**6**	**7**
●	●	●	●	●	●	●

To be sure we are representing all groups of people in this study, please provide the following information about yourself?

Q33. What is your gender?

- ❑ Female
- ❑ Male

Q34. Please indicate which of the following categories includes your age?

- ❑ Under 18
- ❑ 18-24
- ❑ 25-34
- ❑ 35-44
- ❑ 45-49
- ❑ 50-54
- ❑ 55-64
- ❑ 65+

Q35. Please indicate which of the following categories includes your total annual household income.

- ❑ Under $35,000
- ❑ $35,000-$49,999
- ❑ $50,000-$74,999
- ❑ $75,000-$99,999
- ❑ $100,000-124,999
- ❑ $125,000+

Q36. How many children under the age of 18 are living in your household?

- ❑   0
- ❑   1
- ❑   2
- ❑   3
- ❑   4
- ❑   5
- ❑   More than 5

Day Trips Taken

The following chart displays the results of Question #24 which inquired about the frequency of day-trips in the last 12 months.

Chart 19: Number of day-trips taken in last 12 months
% travelers to destination

	NJ Visitors	NY Visitors	PA Visitors
None taken	8%	9%	9%
1 trip	28%	27%	32%
2-3 trips	37%	36%	34%
4 or more trips	28%	28%	25%