



New Jersey | FY2006p VISITOR PROFILE PUBLIC VERSION





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- The report you are about to read is a comprehensive analysis of the travel market in the U.S. and New Jersey. After reviewing this report, it is DKS&A's intention for travel marketers and planners to be better armed with the intelligence they need to develop tourism marketing strategies that will attract new visitors and provide a travel experience that will earn repeat visits and referrals.
- The body of this report is divided into four main sections, which are further targeted to various roles within the tourism organization.
 - The *Market Assessment* section of this report will give the reader an understanding of the size of the tourism market in the U.S. as well as the destination itself.
 - The *Targeting* section describes travelers to a destination and helps travel marketers and planners target future visitors by identifying the largest market segment as well as the growth segments.
 - In the *Positioning* section, the reader will gain an in-depth understanding of the destination's positioning against the competition, which will help to better craft product offerings and messages to the target markets.
 - Finally, the *Communicating* section will help the reader know from where the destination's visitors are originating so that they can launch marketing campaigns that are developed from the intelligence provided in the Targeting and Positioning sections.
- Each of these sections is further divided into three sub-sections:
 - *Section Introduction*: The introduction will introduce the reader to the analysis that will be presented in the upcoming section so the reader will have a better understanding of the fine details.
 - *Detailed Data Graphs*: The detailed data graphs present the data in two primary ways
 - the destination compared to the U.S. and Competitive Set.
 - the destination's performance between FY2006p and FY2005.
 - *Section Summary Findings*: The section summary findings reviews the key conclusions from the data presented in the detailed graphs. This section is good for busy executives who need to know the key conclusions from the data.



Study Specifications and Definitions



- Objective – Describe the domestic overnight leisure travel market in New Jersey compared to the U.S. and competitive set.
- Sampling Frame – All U.S. domestic overnight leisure travelers on mail panel during FY2006p in the following destinations:
 - New Jersey
 - Competitive set
- Timeframe – The timeframe for this study is Q4 2005 through Q3 2006. This report is designated with a “p” to indicate that although the data are based on a 12 month period, it is not the complete 2006 calendar year.



Executive Summary



Background

This New Jersey visitor study provides travel intelligence on U.S., competitive set and New Jersey travel trends from FY2006p. Volume and profile data are from D. K. Shifflet & Associate's *PERFORMANCE/Monitor*SM *Travel Intelligence System*SM – the largest travel-tracking system in the U.S. The New Jersey Overnight Leisure Travel visitor profile is based on a sample of 1,305 Stays. Appendix B contains details on study methodology, while Appendix C contains definitions of terms used in this report.

Market Assessment

U.S. Volume Trends: Total U.S. volume increased only slightly in FY2006p to 3 billion Person-Stays. For all segments, Stays, Person-Stays and Person-Days, the gains in Leisure travel were countered by almost identical declines in Business travel. Interestingly, both Business and Leisure contributed to an increase of almost 5% in Total Direct Spending in FY2006p, bringing Total Direct Spending to \$758 billion. All Leisure segments (Total, Overnight, Day) experienced growth in FY2006p to record levels. Overnight Leisure grew 1.7% to a record 1.14 billion travelers. Growth in Overnight Leisure Spending was even greater (7.1%) to a record \$447 billion. Overnight Leisure's growth rate in travelers is slightly higher than the growth rate in Stays (+1.0%) due to a small increase in Average Party Size.



New Jersey Volume Trends

New Jersey hit new records for both visitors and spending in FY2006p. Both Leisure and Business travel contributed to New Jersey's six year high of 71.1 million visitors and \$15.8 billion in Direct Spending. The rate of visitor growth, however lags behind both the U.S. and New Jersey's competitive set. Conversely, New Jersey spending is increasing at a pace faster than either the U.S. or the competitive set. Overnight Leisure visitors, the focus of this report, increased by 4.3% and the associated Direct Spending increased 17.2% in FY2006p.

New Jersey Market Share

New Jersey's market share of U.S. travel volume differs depending on the volume measure. Shares of U.S. Overnight Leisure Stays, Person-Stays, and Person-Days ranges from 2% to 2.7%. Share of U.S. Overnight Leisure Travel spending is 2.3% in FY2006p. New Jersey's share of Overnight Leisure Person-Stays ranks 5th among its competitors. Only one competitor receives a smaller share of U.S. travel.

New Jersey Satisfaction and Value

Excellent satisfaction and value ratings increased for New Jersey as well as the U.S. and the competitive set in FY2006p. New Jersey is still rated lower than either the U.S or the competitive set, however.



Executive Summary



Targeting

New Jersey visitors tend to be older and have no children. Thus, it is not surprising that New Jersey hosts fewer Young Families than do its competitors. With an average income of \$82,600, they earn higher incomes than visitors to the average U.S. destination or to its individual competitors. Unlike the average U.S. destination or the competitive set, Boomers, who spend the most, make up the largest share of Overnight Leisure visitors to New Jersey.

Positioning

One-third of New Jersey's Overnight Leisure travel is for Getaway Weekends as opposed to the average U.S. destination and the competitive set, where Visiting Friends and Relatives is the main purpose for travel. When General Vacations are added, over half of New Jersey's Overnight Leisure travel is for vacation type purposes. Travel parties on General Vacations in New Jersey spend the most and, in fact, represent a higher share of Trip Dollars than Stays making them a financially valuable group.

Half of New Jersey travel parties are comprised of couples, which is greater than its competitive set or the U.S. Conversely, as compared to its competitive set or the U.S, New Jersey hosts the smallest share of visitors with children in the household. The larger parties, however spend more and are thus more financially valuable travelers. In fact only parties comprised of three more adults or those with children present spend more than the average New Jersey travel party.



Executive Summary



Positioning (cont.)

With almost 90% of its visitors arriving by car and 77% traveling 200 or fewer miles, it is not surprising that New Jersey's visitors spend less per person per day on transportation than do visitors to its competition or to the average U.S. destination. The largest proportion of spending for New Jersey visitors is on entertainment, while food is the largest spending category for its competitive set as well as for the average U.S. destination.

More New Jersey visitors engage in Gaming, Dining, Entertainment Night Life and Beach activities than visitors to its competitive set or the average U.S. destination. Average party per trip spending is greater than the New Jersey average among all those parties engaging in these activities. In fact, the proportion of Trip Dollars these parties represent is greater than the proportion of Stays they represent making activity participation financially valuable to the State.

New Jersey hosts the largest proportion of its visitors in the third quarter, particularly in July and August. Those traveling in the third quarter tend to spend the most per party per trip and because the proportion of Trip Dollars for this quarter is greater than the proportion of Stays, this is a financially valuable quarter for New Jersey.

Most travel parties to the average U.S. destination as well as New Jersey and its competitors are more likely to stay in hotels or motels than in other types of accommodations. Those who visit New Jersey, however, are almost 20% more likely to do so than those visiting either its competitive set or the average U.S. destination.



Communicating

More than half of New Jersey's visitors come from either New York or the State itself. In fact, the top ten states account for almost all (93%) of New Jersey's travel. New York City and Philadelphia are the top two DMAs for New Jersey in terms of visitors, however, those spending the most come from the DMAs of Syracuse, Albany-Schenectady-Troy and West Palm Beach-Ft. Pierce.

Key Conclusions

Don't be lulled by higher spending – Visitor Spending in New Jersey is growing at a faster rate than visitors. In addition, Overnight Leisure travel parties as well as Spending continue to grow. Travel party sizes, however are stagnate or declining. This coupled with stagnate or declining stay lengths is a red flag. In fact, in looking at only the Business segment, the number of business travelers is up, but the number who travel together and their length of stay has dropped resulting in decreased Total Direct Spending for these travelers even though spending per person per day is up.

New Jersey Visitors rated Satisfaction and Value higher in FY2006p – Although New Jersey Satisfaction and Value ratings increased in FY2006p, they are still below its competitive set and the average U.S. destination.

Most New Jersey visitors are high spending Boomers while for the competitive set and the average U.S. destination, Gen X makes up the largest travel segment. Although this generation does not earn or spend as much as Boomers it is only a matter of time until they do.



Executive Summary



Key Conclusions (cont.)

Encourage larger travel parties – Most travelers to New Jersey are couples and travel for Getaway Weekends. Travel parties of three or more adults or those with children present are the most financially valuable to the State, thus promoting “double date” or “family” travel would increase travel parties and thus spending in New Jersey.

Short distance travelers spend the most on Entertainment - Nine out of ten New Jersey’s visitors arrive by car and more than 3 out of 4 travel 200 or fewer miles. They most often come for Gaming, but spend the most on Entertainment, which increased 24% in FY2006p.

New York, New York – In the past year New York State accounted for 1 in 4 visitors to New Jersey and during the past three years 40% of New Jersey visitors have hailed from the DMA of New York, NY.



Market Assessment

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



Targeting

Who are New Jersey's most important visitors?



Positioning

How should New Jersey position its product?



Communicating

Where should New Jersey advertise and promote?



What is the size and scope of tourism nationally, regionally and locally?
How is New Jersey doing compared to the competitors in capturing market share?
What are the trends?





Market Assessment Introduction



- The Market Assessment section of this report will provide an overview of the U.S. travel market by reviewing population and travel volume trends. Travel volume is measured with four performance indicators (described in detail on the next page) to help destinations understand past market movements and prepare for possible changes in the future.
- The Market Assessment section goes into further detail of the market trends in New Jersey. This information will help New Jersey understand the size of the U.S. travel market and the opportunities to increase the size of their market, whether it be in terms of visitor volume, visitor days, Stays or total direct spending.
- Travel volume is estimated from D.K. Shifflet & Associates' *PERFORMANCE/Monitor*SM monthly travel tracking system and uses other available travel data as model inputs, such as hotel data and government transportation statistics.
- The section ends with a review of traveler satisfaction and value ratings of New Jersey. The ratings are compared to the competition using the U.S. as a benchmark and will give destination's competitive intelligence on consumer perceptions of travel satisfaction and value.



U.S. Detailed Volume Findings



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

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

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

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

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

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

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

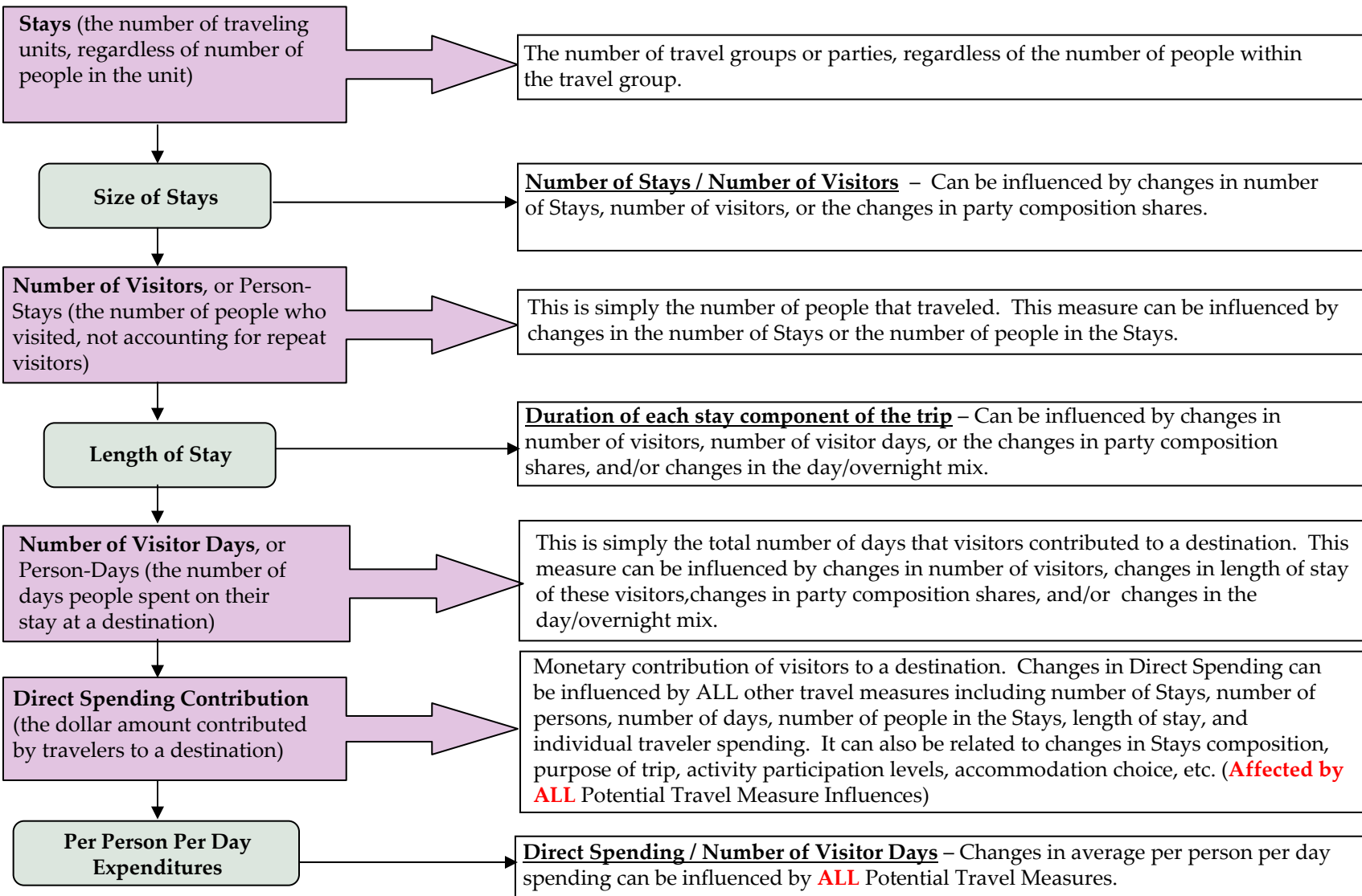
Mr. & Mrs. Smith's 5-day vacation in Anytown, USA = 10 person-days (2 Person-Stays x 5 days)

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

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

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

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





U.S. Person-Stays Volume Overview



- U.S. Person-Stays volume continued its six year growth pattern.
- The continued growth in U.S. Person-Stays is due primarily to the steady growth in the Leisure segment, which accounted for three-fourths of U.S. travel in FY2006p.
- The Day Leisure segment, the fastest growing Person-Stay segment, increased almost 5% in FY2006p, accounting for nearly half of all Leisure Person-Stays. Overnight Leisure Person-Stays grew at a slower pace between FY2005 and FY2006p than did the Day Leisure segment.
- Day Business continues its steady growth started in FY2003, while Overnight Business, the smallest segment, continues to fluctuate. Due to the small shares of U.S. Person-Stays held by Day and Overnight Business, growth in these segments did not make a big impact on total volume.



U.S. Volume Changes Explained



		FY2005	FY2006p	% Change
Stays (Travel Party) (million)	<i>Total</i>	1362.5	1376.0	1.0%
	<i>Business</i>	468.6	452.8	-3.4%
	<i>Leisure</i>	893.8	923.2	3.3%
Average Party Size (Persons)	<i>Total</i>	2.18	2.20	1.1%
	<i>Business</i>	1.63	1.66	2.0%
	<i>Leisure</i>	2.46	2.46	0.0%
Person-Stays (Visitors) (million)	<i>Total</i>	2964.1	3025.4	2.1%
	<i>Business</i>	761.7	750.4	-1.5%
	<i>Leisure</i>	2202.4	2275.0	3.3%
Travel Parties/0+ Days (Average Stay Length)	<i>Total</i>	2.20	2.18	-0.5%
	<i>Business</i>	2.01	1.98	-1.3%
	<i>Leisure</i>	2.26	2.25	-0.4%
Person-Days (Visitor Days) (million)	<i>Total</i>	6507.9	6606.5	1.5%
	<i>Business</i>	1527.3	1484.5	-2.8%
	<i>Leisure</i>	4980.5	5122.1	2.8%

- U.S. Stays increased slightly between FY2005 and FY2006p. The increase in Leisure Stays is offset by the decrease in Business travel parties.
- While Leisure party size remained unchanged in FY2006p, Business party sized increased driving the increase in total average party size.
- The total number of visitors to the average U.S. destination grew in FY2006p, completely attributable to the Leisure segment and in particular to the increase in the number of Leisure travel parties.
- Despite the growth in Business average party size, the reduction in the number of Business Stays resulted in a slight decrease in the number of Business visitors to the average U.S. destination in FY2006p.
- Although there is almost no change in total average stay length, the Business segment shows a larger decrease than does the Leisure segment.
- The increases in Person-Stays coupled with the very slight decreases in average stay length resulted in a slight increase in total Person-Days, due solely to the Leisure segment.
- Both Business Person-Stays and Business average stay length declined in FY2006p, resulting in an overall decrease in Business Person-Days in the average U.S. destination in FY2006p.



U.S. Volume Changes Explained

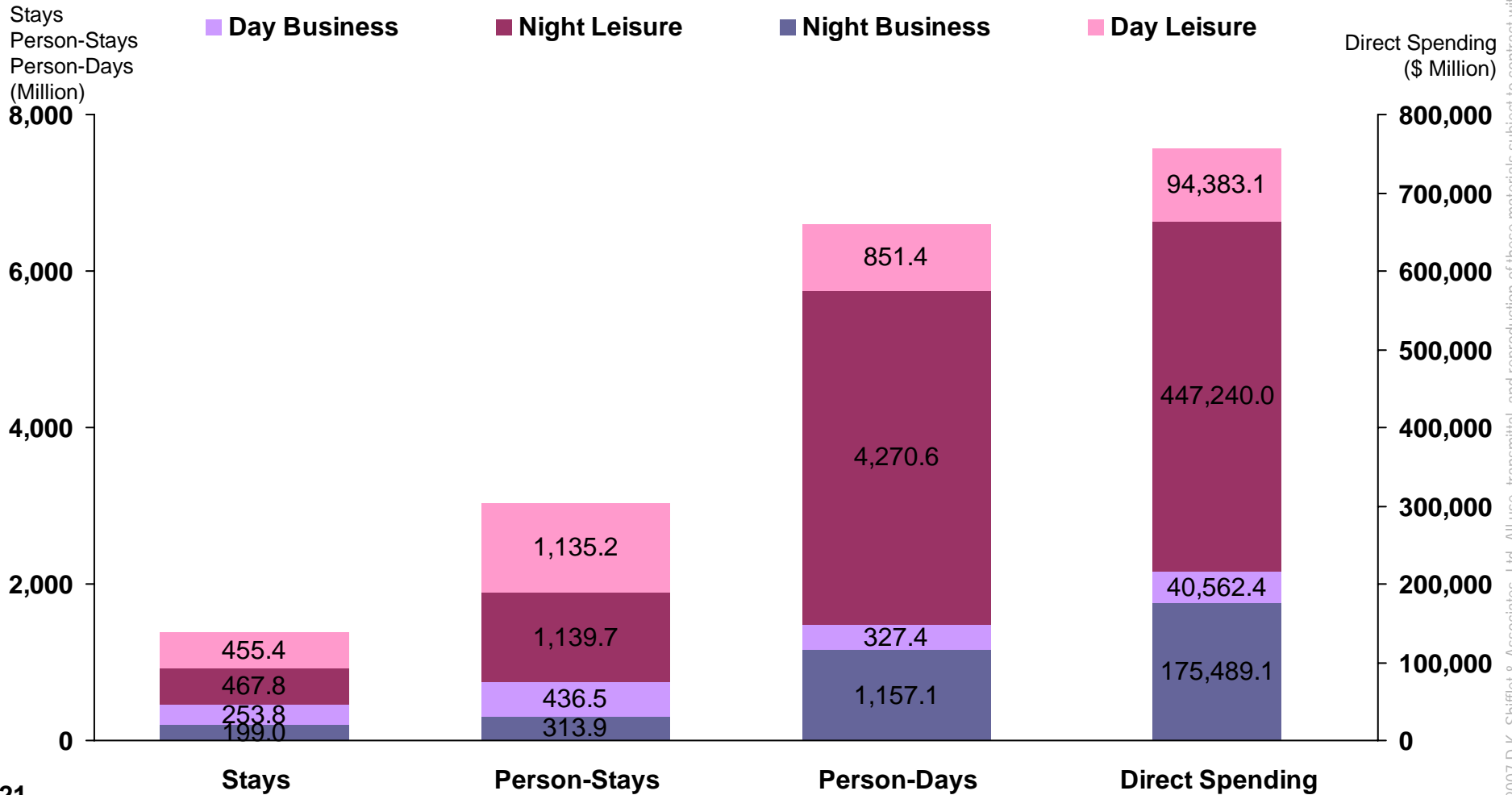


		FY2005	FY2006p	% Change
Day/ Overnight Mix				
(% Day Trips)	<i>Total</i>	51%	52%	1.6%
	<i>Business</i>	55%	56%	1.5%
	<i>Leisure</i>	48%	49%	2.0%
Average Party Spending				
(\$)	<i>Total</i>	523.7	550.6	5.1%
	<i>Business</i>	447.5	477.1	6.6%
	<i>Leisure</i>	563.7	586.7	4.1%
Total Direct Spending				
(\$ billion)	<i>Total</i>	713.5	757.7	6.2%
	<i>Business</i>	209.7	216.1	3.0%
	<i>Leisure</i>	503.8	541.6	7.5%
Spending per Person per Day				
(\$)	<i>Total</i>	109.6	114.7	4.6%
	<i>Business</i>	137.3	145.5	6.0%
	<i>Leisure</i>	101.2	105.7	4.5%

- Total Direct Spending increased for Total, Business and Leisure in FY2006p.
- The increase in Business Total Direct Spending, coupled with the slight decline in the Business average travel party size, resulted in an increase in Business average party spending when compared to FY2005.
- Leisure average party spending also increased, due solely to the increase in Leisure Direct Spending as the Leisure average party size remains unchanged in FY2006p over FY2005.
- Similarly, the Business per person per day spending increased due to two factors, the growth in Business Direct Spending, and the decrease in Business Person-Days. Due to increases in the leisure Direct Spending and in Leisure Person-Days the Leisure per person per day spending increased, but at a slower pace than the Business segment,

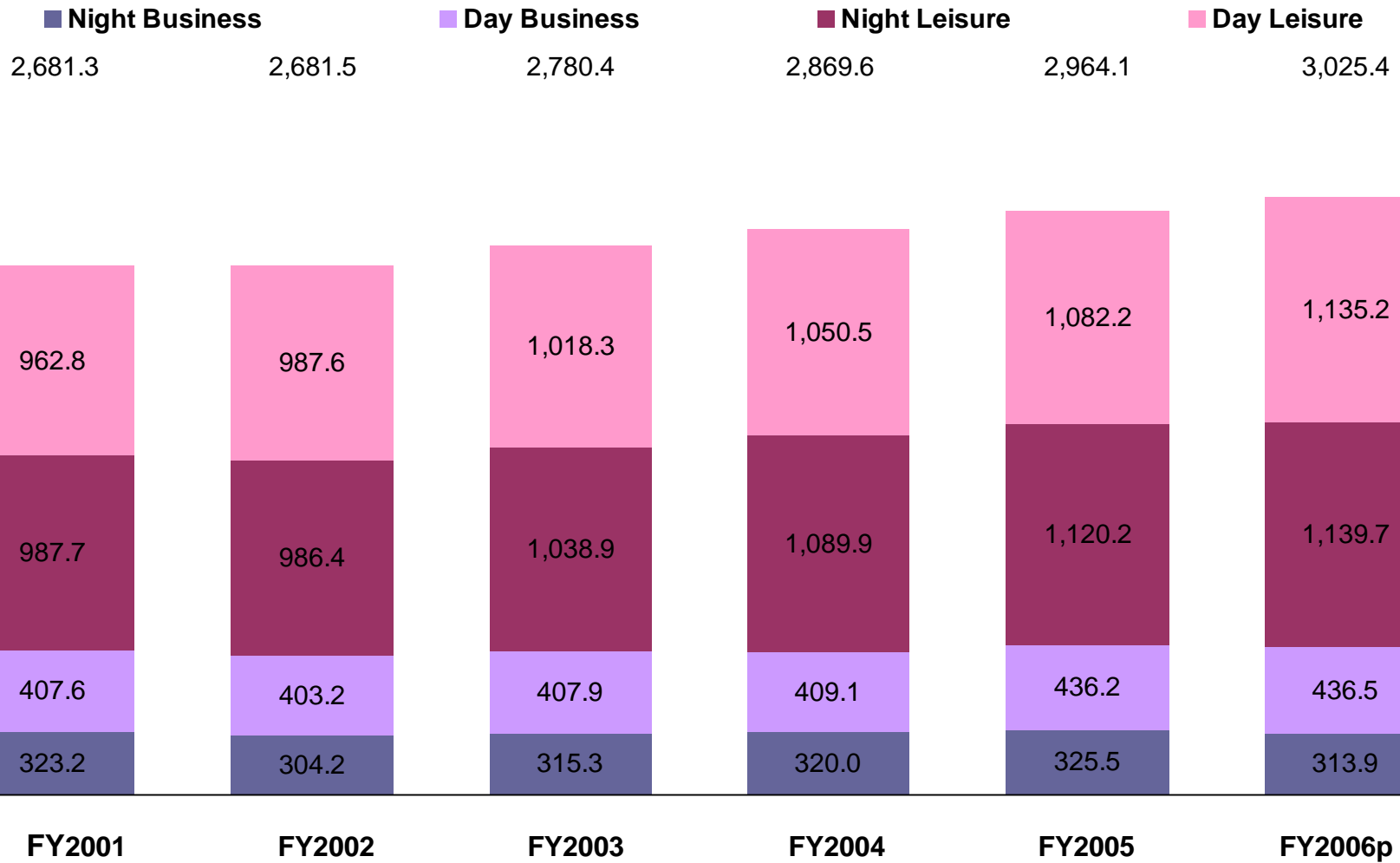


FY2006p U.S. Volume



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U.S. Person-Stays Volume (FY2001-FY2006p/Million)





U.S. Person-Stay Volume: % Change by Travel Segment (FY2001-FY2006p)



This table shows the year-to-year percent changes in Person-Stays volume for each of the primary travel segments.

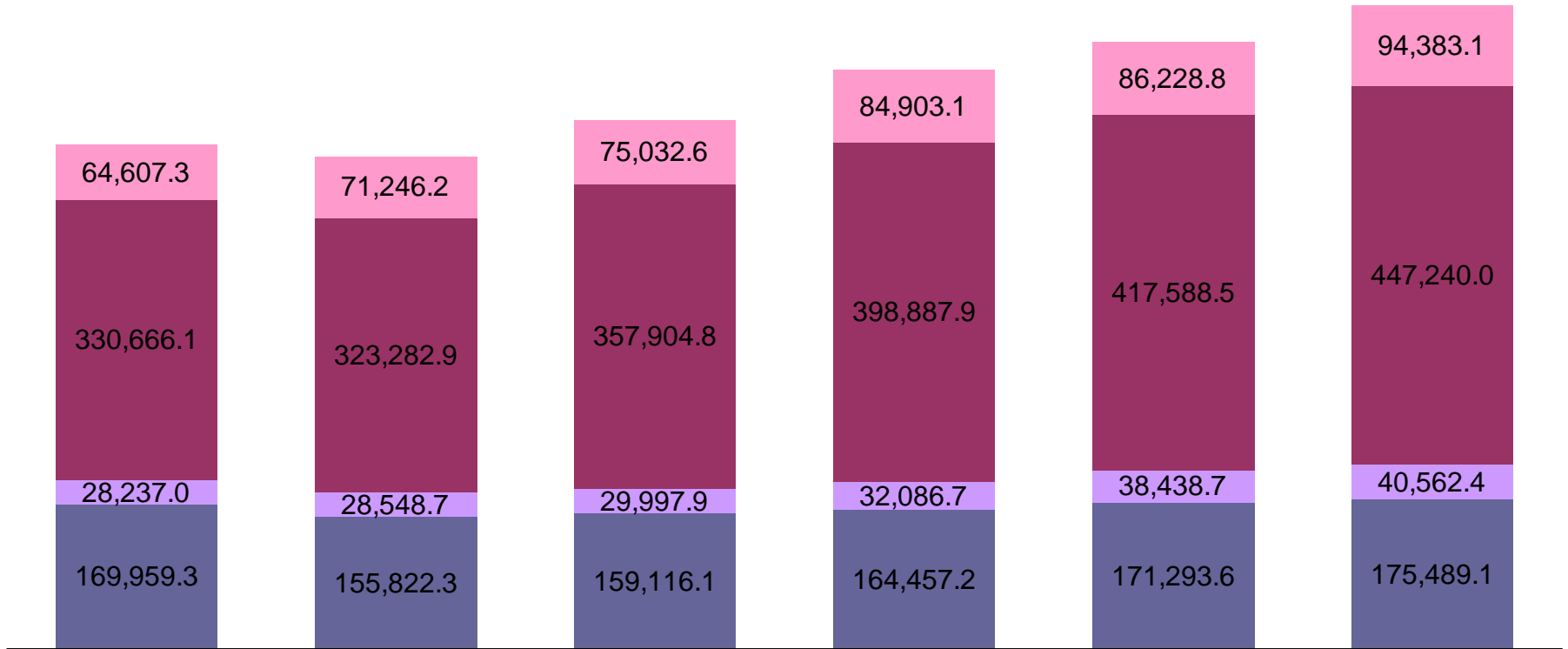
	FY02/FY01	FY03/FY02	FY04/FY03	FY05/FY04	FY06p/FY05
Total	0.0%	3.7%	3.2%	3.3%	2.1%
Business	-3.2%	2.2%	0.8%	4.5%	-1.5%
Leisure	1.2%	4.2%	4.0%	2.9%	3.3%
Day	1.5%	2.5%	2.3%	4.0%	3.5%
Night	-1.5%	4.9%	4.1%	2.5%	0.5%
Day Business	-1.1%	1.2%	0.3%	6.6%	0.1%
Day Leisure	2.6%	3.1%	3.2%	3.0%	4.9%
Night Business	-5.9%	3.7%	1.5%	1.7%	-3.6%
Night Leisure	-0.1%	5.3%	4.9%	2.8%	1.7%



U.S. Direct Spending Volume (FY2001-FY2006p/\$/Million)



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





U.S. Direct Spending Volume: % Change by Travel Segment (FY2001-FY2006p)

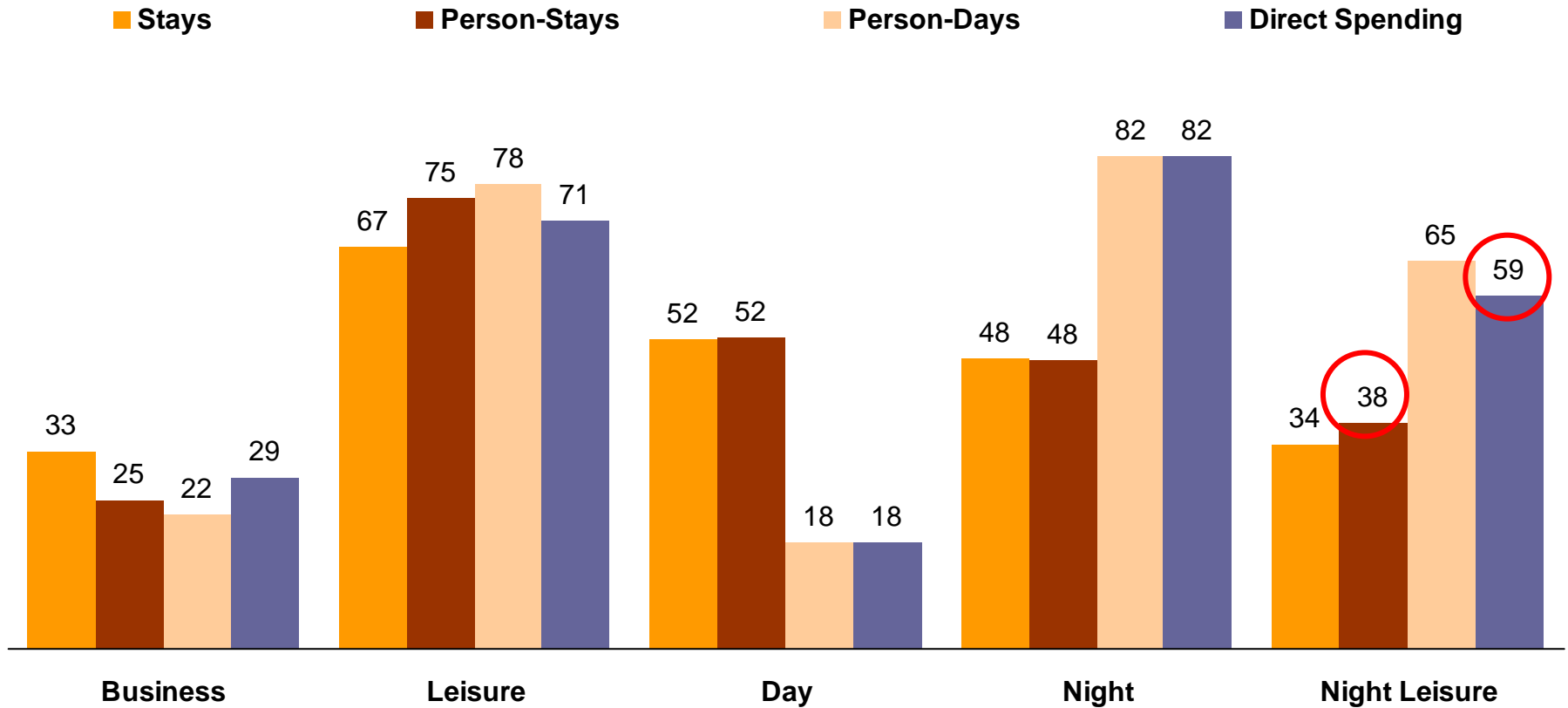


This table shows the year-to-year percent changes in Direct Spending volume for each of the primary travel segments.

	FY02/FY01	FY03/FY02	FY04/FY03	FY05/FY04	FY06p/FY05
Total	-2.5%	7.5%	9.4%	4.9%	6.2%
Business	-7.0%	2.6%	3.9%	6.7%	3.0%
Leisure	-0.2%	9.7%	11.7%	4.1%	7.5%
Day	7.5%	5.2%	11.4%	6.6%	8.2%
Night	-4.3%	7.9%	9.0%	4.5%	5.7%
Day Business	1.1%	5.1%	7.0%	19.8%	5.5%
Day Leisure	10.3%	5.3%	13.2%	1.6%	9.5%
Night Business	-8.3%	2.1%	3.4%	4.2%	2.4%
Night Leisure	-2.2%	10.7%	11.5%	4.7%	7.1%



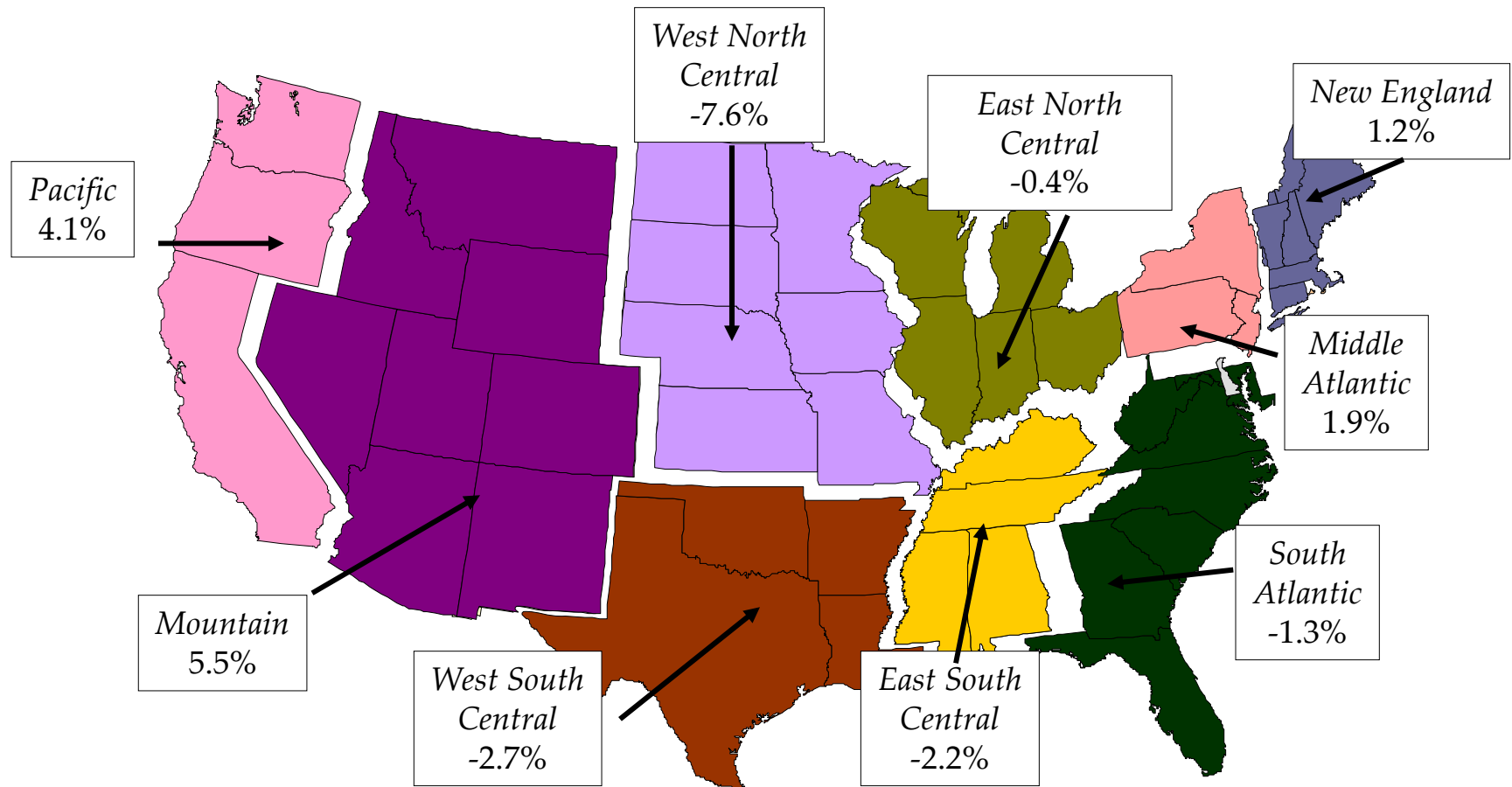
This chart shows each travel segment's proportion of each of the four volume measure totals—Stays, Person-Stays, Person-Days, and Direct Spending.



U.S. Travel Volume Change by Region (FY2006p/% of Overnight Leisure Person-Stays)



The U.S. Bureau of Census groups states into nine regions.





Tree in snow near Ringwood

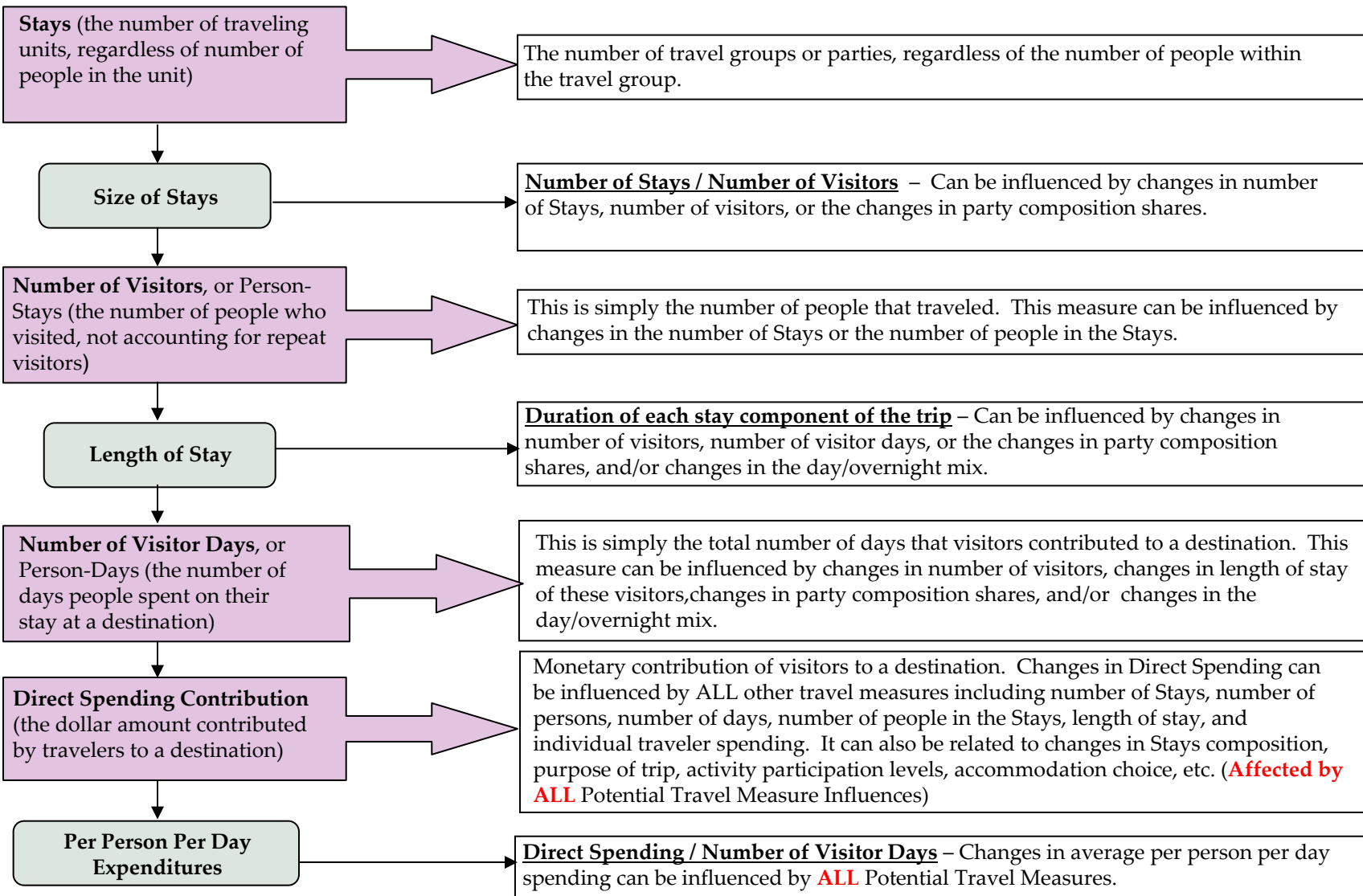


Key Market Assessment Summary — Understanding the Travel Measures



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

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





New Jersey Person-Stays Volume Overview



New Jersey' Stays, Person-Stays and Direct Spending volumes all hit six year highs in FY2006p.

Person-Stays

- Person-Stays volume of New Jersey increased in FY2006p with both Leisure and Business Person-Stays contributing to the increase in FY2006p .
- Day (both Business and Leisure) visitor volume decreased in FY2006p, while overnight visitors increased.
- Although total Person-Stays increased slightly for New Jersey in FY2006p, it did not keep pace with either the U.S., or the competitive set.

Direct Spending

- New Jersey's Direct Spending volume increased 10.2% in FY2006p, the increase was fueled solely by the increase in Leisure Direct Spending.
- Both Day and Overnight Leisure Direct Spending increased, with Overnight Leisure reaching a six year high in FY2006p.
- Day Business continues to show declines after a sharp increase in FY2004, while Overnight Business volumes have been fluctuating over the past several fiscal years.
- The FY2006p growth in New Jersey's total Direct Spending is at a pace greater than either its competitive set or the average U.S. destination. The Leisure segment provided the most growth for both the U.S. and for New Jersey.



New Jersey Volume Summary (FY2005 - FY2006p/Million)



Stays	FY2001	FY2002	FY2003	FY2004	FY2005	FY2006p	FY02/FY01	FY03/FY02	FY04/FY03	FY05/FY04	FY06P/FY05
Total	29.5	27.5	30.8	33.8	33.4	34.0	-6.7%	11.8%	9.8%	-1.1%	1.7%
Business	8.4	8.9	8.9	8.6	8.1	8.5	6.0%	0.1%	-3.7%	-5.6%	4.8%
Leisure	21.1	18.7	21.9	25.2	25.3	25.5	-11.8%	17.4%	15.3%	0.4%	0.7%
Day	16.2	15.5	18.6	19.5	19.1	18.2	-4.2%	20.2%	4.8%	-2.0%	-5.0%
Night	13.3	12.0	12.2	14.3	14.3	15.8	-9.8%	1.0%	17.4%	0.1%	10.7%
Day Business	4.7	6.1	6.4	5.7	5.2	5.4	28.9%	6.3%	-12.2%	-8.4%	3.8%
Day Leisure	11.5	9.4	12.2	13.9	14.0	12.8	-17.8%	29.2%	13.8%	0.6%	-8.2%
Night Business	3.7	2.8	2.5	2.9	2.9	3.1	-23.3%	-13.0%	18.5%	-0.1%	6.7%
Night Leisure	9.7	9.2	9.7	11.4	11.4	12.7	-4.7%	5.2%	17.1%	0.1%	11.8%

Person-Stays	FY2001	FY2002	FY2003	FY2004	FY2005	FY2006p	FY02/FY01	FY03/FY02	FY04/FY03	FY05/FY04	FY06P/FY05
Total	61.2	59.3	66.0	69.9	70.2	71.1	-3.1%	11.3%	6.0%	0.4%	1.2%
Business	12.9	12.2	13.0	12.7	13.1	13.2	-5.9%	7.2%	-2.8%	3.5%	0.8%
Leisure	48.2	47.1	52.9	57.3	57.1	57.9	-2.4%	12.4%	8.2%	-0.3%	1.3%
Day	34.0	33.3	40.4	40.4	39.0	38.6	-2.2%	21.3%	0.1%	-3.4%	-1.2%
Night	27.1	26.0	25.6	29.6	31.2	32.5	-4.2%	-1.4%	15.5%	5.5%	4.2%
Day Business	7.9	8.1	9.2	8.4	8.5	8.5	1.7%	13.8%	-8.1%	1.3%	-0.8%
Day Leisure	26.1	25.2	31.2	31.9	30.5	30.1	-3.4%	23.7%	2.5%	-4.6%	-1.2%
Night Business	5.0	4.1	3.9	4.2	4.6	4.8	-18.0%	-5.8%	9.9%	8.0%	3.9%
Night Leisure	22.1	21.9	21.8	25.3	26.6	27.7	-1.1%	-0.6%	16.4%	5.0%	4.3%



New Jersey Volume Summary (Con't)

(FY2005 - FY2006p/Million)



Person-Days	FY2001	FY2002	FY2003	FY2004	FY2005	FY2006p	FY02/FY01	FY03/FY02	FY04/FY03	FY05/FY04	FY06P/FY05
Total	119.5	112.3	121.4	129.1	131.4	130.7	-6.0%	8.1%	6.4%	1.7%	-0.5%
Business	22.5	19.4	20.7	20.2	23.0	20.4	-14.0%	7.1%	-2.6%	13.6%	-11.2%
Leisure	97.0	92.9	100.6	108.9	108.4	110.3	-4.2%	8.3%	8.2%	-0.5%	1.7%
Day	25.5	25.0	30.3	30.2	29.2	29.0	-2.2%	21.3%	-0.2%	-3.4%	-0.4%
Night	94.0	87.4	91.1	99.0	102.2	101.6	-7.0%	4.3%	8.6%	3.3%	-0.6%
Day Business	5.9	6.0	6.9	6.3	6.7	6.4	1.7%	13.8%	-8.6%	7.1%	-4.5%
Day Leisure	19.6	18.9	23.4	23.9	22.4	22.6	-3.4%	23.7%	2.2%	-6.2%	0.8%
Night Business	16.6	13.3	13.9	13.9	16.2	14.0	-19.6%	4.1%	0.4%	16.6%	-13.9%
Night Leisure	77.4	74.0	77.3	85.0	86.0	87.7	-4.3%	4.3%	10.1%	1.1%	1.9%

Direct Spending	FY2001	FY2002	FY2003	FY2004	FY2005	FY2006p	FY02/FY01	FY03/FY02	FY04/FY03	FY05/FY04	FY06P/FY05
Total	\$11,408.2	\$11,730.2	\$12,679.8	\$13,367.6	\$14,321.5	\$15,787.5	2.8%	8.1%	5.4%	7.1%	10.2%
Business	\$3,490.0	\$3,069.6	\$2,854.4	\$3,045.7	\$3,278.9	\$3,098.7	-12.0%	-7.0%	6.7%	7.7%	-5.5%
Leisure	\$7,918.2	\$8,660.6	\$9,825.3	\$10,321.9	\$11,042.6	\$12,688.8	9.4%	13.4%	5.1%	7.0%	14.9%
Day	\$2,211.9	\$2,463.6	\$3,277.4	\$3,254.8	\$3,222.5	\$3,355.7	11.4%	33.0%	-0.7%	-1.0%	4.1%
Night	\$9,196.3	\$9,266.7	\$9,402.4	\$10,112.7	\$11,099.1	\$12,431.8	0.8%	1.5%	7.6%	9.8%	12.0%
Day Business	\$636.1	\$605.0	\$647.2	\$802.0	\$767.3	\$732.1	-4.9%	7.0%	23.9%	-4.3%	-4.6%
Day Leisure	\$1,575.8	\$1,858.6	\$2,630.2	\$2,452.8	\$2,455.2	\$2,623.6	17.9%	41.5%	-6.7%	0.1%	6.9%
Night Business	\$2,853.9	\$2,464.6	\$2,207.3	\$2,243.6	\$2,511.7	\$2,366.6	-13.6%	-10.4%	1.6%	11.9%	-5.8%
Night Leisure	\$6,342.3	\$6,802.0	\$7,195.1	\$7,869.1	\$8,587.4	\$10,065.2	7.2%	5.8%	9.4%	9.1%	17.2%

New Jersey Volume Changes Explained



		FY2005	FY2006p	% Change
Stays (Travel Party) (million)	<i>Total</i>	33.4	34.0	1.7%
	<i>Business</i>	8.1	8.5	4.8%
	<i>Leisure</i>	25.3	25.5	0.7%
Average Party Size (Persons)	<i>Total</i>	2.10	2.09	-0.5%
	<i>Business</i>	1.62	1.56	-3.8%
	<i>Leisure</i>	2.25	2.27	0.6%
Person-Stays (Visitors) (million)	<i>Total</i>	70.2	71.1	1.2%
	<i>Business</i>	13.1	13.2	0.8%
	<i>Leisure</i>	57.1	57.9	1.3%
Average Stay Length (Travel Parties/0+ Days)	<i>Total</i>	1.87	1.84	-1.8%
	<i>Business</i>	1.75	1.54	-11.9%
	<i>Leisure</i>	1.90	1.91	0.4%
Person-Days (Visitor Days) (million)	<i>Total</i>	131.4	130.7	-0.5%
	<i>Business</i>	23.0	20.4	-11.2%
	<i>Leisure</i>	108.4	110.3	1.7%

- A comparison of New Jersey's total travel market in FY2006p shows increases in the number of travel parties, visitors and Direct Spending. The increase in Stays is due primarily to the growth in the Business segment, while increase in Person-Stays volume is fueled primarily by the Leisure segment.
- Due to a larger increase in Stays, Person-Stays volume increased slightly in FY2006p despite a small decrease in average party size. The shorter average stay length, however caused a decrease in Person-Days volume.
- Business travel took some heavy hits due to decreases in average party size and average stay length. Person-Days were particularly affected with an 11.2% decrease, resulting in an overall decrease in Total Person-Days.
- Both party size and stay length were on the positive side of stable resulting in a very slight increase in Leisure Person-Days.

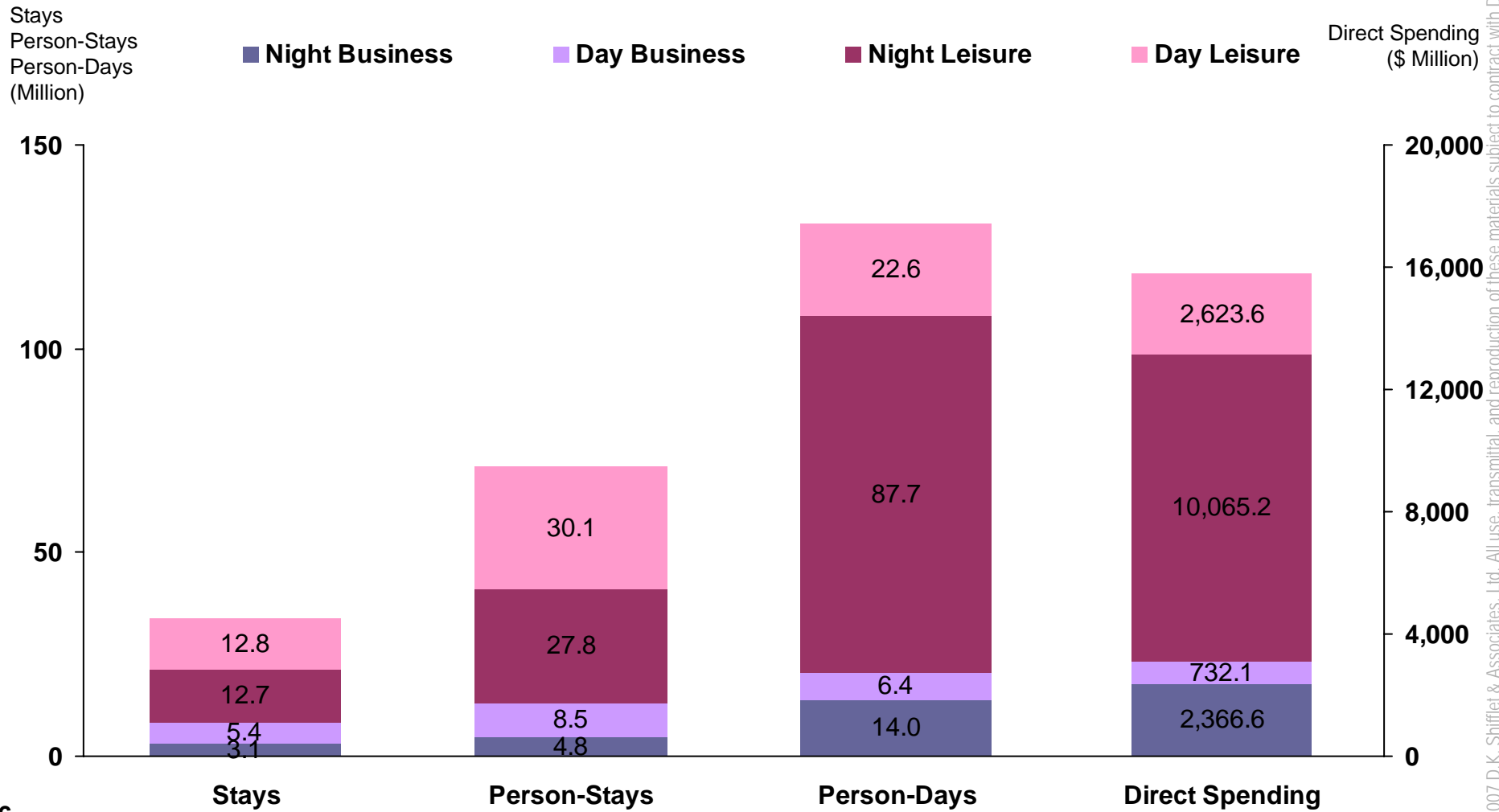


New Jersey Volume Changes Explained



		FY2005	FY2006p	% Change
Day/ Overnight Mix				
(% Day Trips)	<i>Total</i>	57.3%	53.5%	-6.6%
	<i>Business</i>	64.0%	63.4%	-1.0%
	<i>Leisure</i>	55.1%	50.2%	-8.9%
Average Party Spending				
(\$)	<i>Total</i>	\$428.7	\$464.5	8.4%
	<i>Business</i>	\$405.4	\$365.4	-9.9%
	<i>Leisure</i>	\$436.1	\$497.4	14.1%
Total Direct Spending				
(\$ Million)	<i>Total</i>	\$14,321.5	\$15,787.5	10.2%
	<i>Business</i>	\$3,278.9	\$3,098.7	-5.5%
	<i>Leisure</i>	\$11,042.6	\$12,688.8	14.9%
Spending per Person per Day				
(\$)	<i>Total</i>	\$109.0	\$120.8	10.8%
	<i>Business</i>	\$142.8	\$151.9	6.4%
	<i>Leisure</i>	\$101.9	\$115.1	13.0%

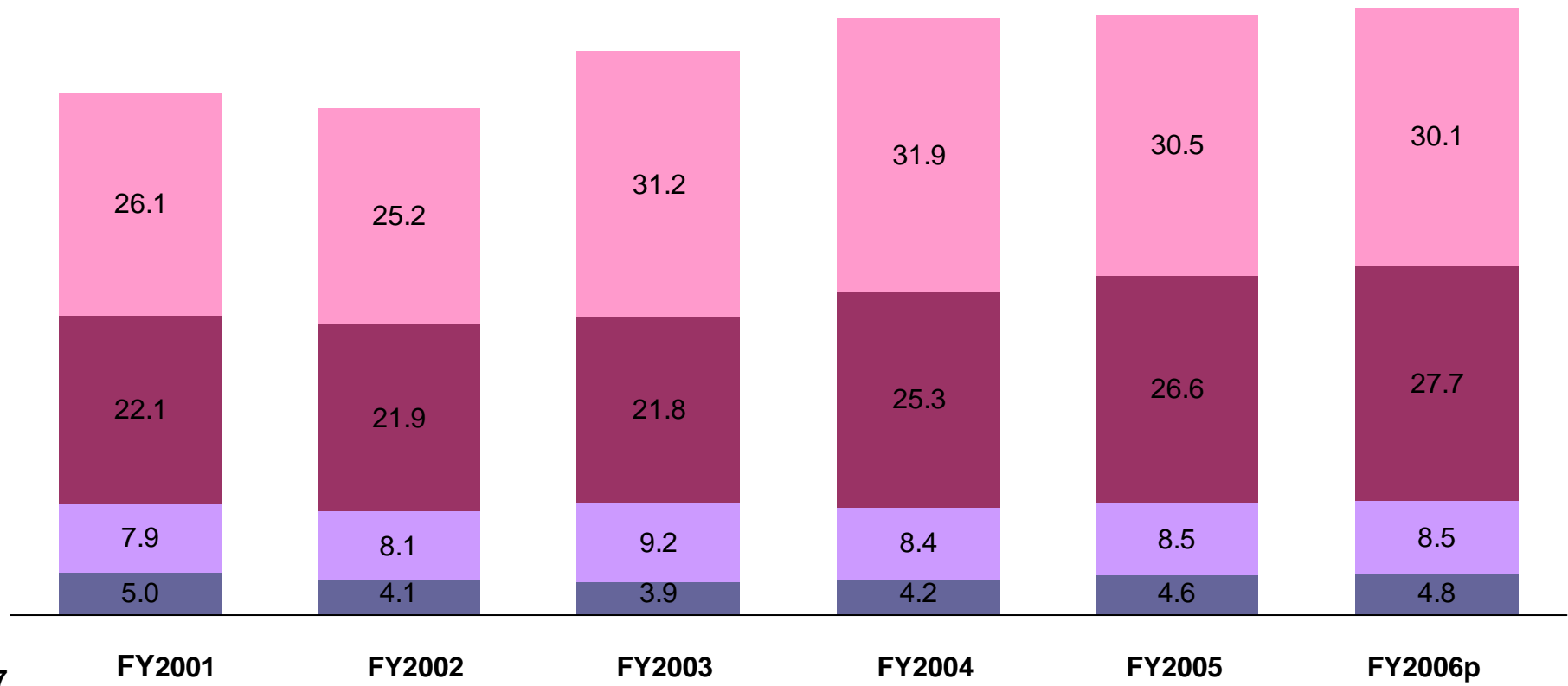
- Total Direct Spending by New Jersey travelers increased as a result of many factors including the increase in Stays and the number of visitors. The 10.2% growth in total Direct Spending coupled with an almost unchanged average travel party size, resulted in an 8.4% increase in average party spending in FY2006p. Total daily visitor spending increased despite an unchanged average party size and a shorter average stay length.
- Average party spending increased for Leisure, but decreased for Business.
- Although business travelers reported spending more on an individual basis, the increase in total Direct Spending is largely attributable to the increase in Leisure Direct Spending.



New Jersey Person-Stays Volume (FY2001-FY2006p/Million)



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





New Jersey Person-Stays Volume: % Change by Travel Segment (FY2001-FY2006p)



This chart shows the Person-Stays volume year-to-year percent changes for each of the nine travel segments discussed in this report.

	FY02/FY01	FY03/FY02	FY04/FY03	FY05/FY04	FY06p/FY05
Total	-3.1%	11.3%	6.0%	0.4%	1.2%
Business	-5.9%	7.2%	-2.8%	3.5%	0.8%
Leisure	-2.4%	12.4%	8.2%	-0.3%	1.3%
Day	-2.2%	21.3%	0.1%	-3.4%	-1.2%
Night	-4.2%	-1.4%	15.5%	5.5%	4.2%
Day Business	1.7%	13.8%	-8.1%	1.3%	-0.8%
Day Leisure	-3.4%	23.7%	2.5%	-4.6%	-1.2%
Night Business	-18.0%	-5.8%	9.9%	8.0%	3.9%
Night Leisure	-1.1%	-0.6%	16.4%	5.0%	4.3%



U.S., Comp Set and New Jersey Person-Says Volume: % Change by Travel Segment



	U.S. FY06p/FY05	Comp Set FY06p/FY05	New Jersey FY06p/FY05
Total	2.1%	2.4%	1.2%
Business	-1.5%	-4.3%	0.8%
Leisure	3.3%	4.9%	1.3%
Day	3.5%	2.8%	-1.2%
Night	0.5%	2.1%	4.2%
Day Business	0.1%	-5.0%	-0.8%
Day Leisure	4.9%	6.1%	-1.2%
Night Business	-3.6%	-3.4%	3.9%
Night Leisure	1.7%	3.7%	4.3%

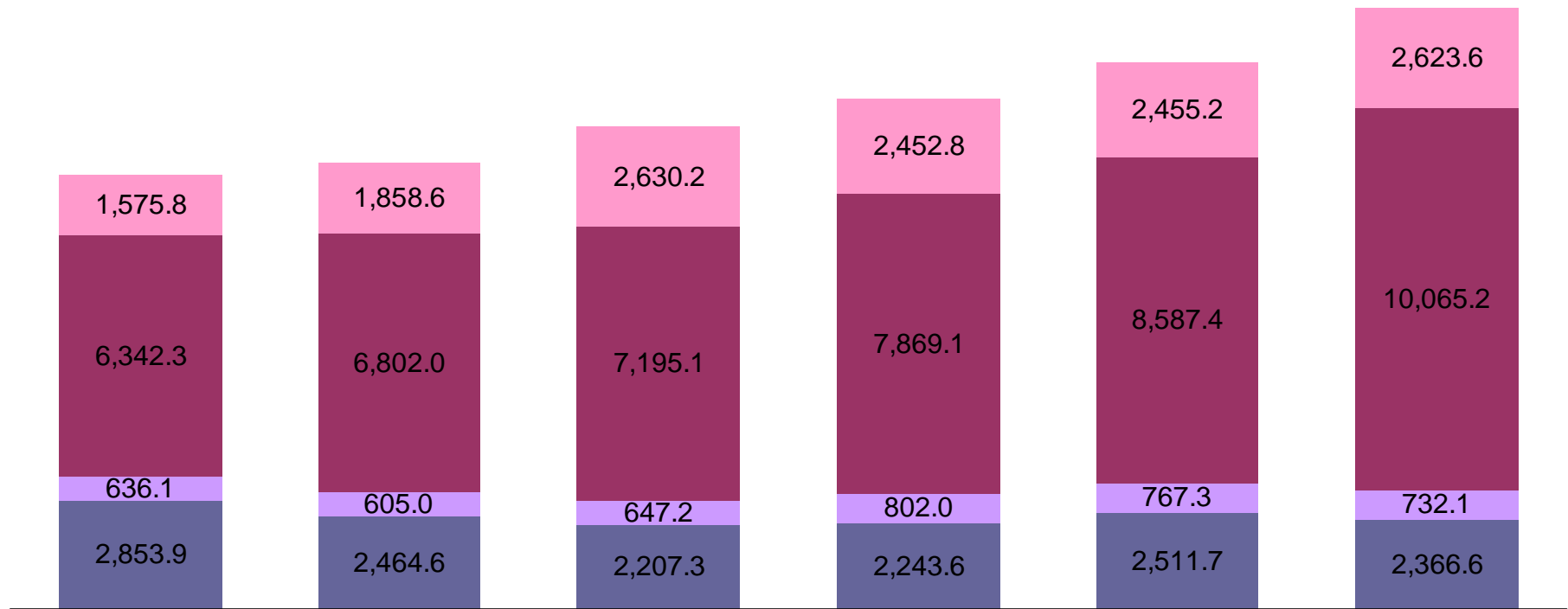


New Jersey Direct Spending Volume (FY2001-FY2006p/Million)



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

11,408.2 11,730.2 12,679.8 13,367.6 14,321.5 15,787.5





New Jersey Direct Spending Volume: % Change by Travel Segment (FY2001-FY2006p)



This chart shows the Direct Spending volume year-to-year percent changes for each of the nine travel segments discussed in this report.

	FY02/FY01	FY03/FY02	FY04/FY03	FY05/FY04	FY06p/FY05
Total	2.8%	8.1%	5.4%	7.1%	10.2%
Business	-12.0%	-7.0%	6.7%	7.7%	-5.5%
Leisure	9.4%	13.4%	5.1%	7.0%	14.9%
Day	11.4%	33.0%	-0.7%	-1.0%	4.1%
Night	0.8%	1.5%	7.6%	9.8%	12.0%
Day Business	-4.9%	7.0%	23.9%	-4.3%	-4.6%
Day Leisure	17.9%	41.5%	-6.7%	0.1%	6.9%
Night Business	-13.6%	-10.4%	1.6%	11.9%	-5.8%
Night Leisure	7.2%	5.8%	9.4%	9.1%	17.2%



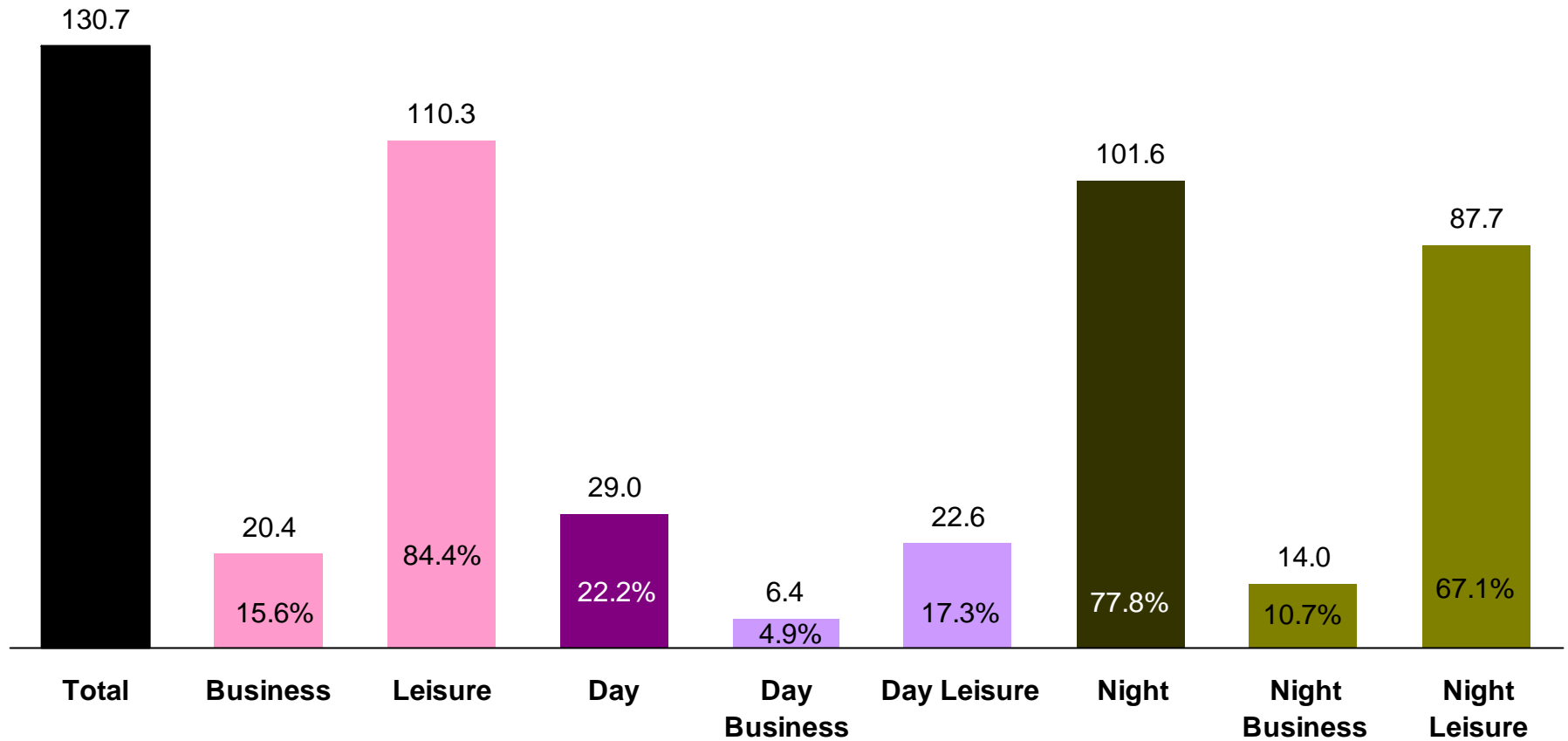
U.S., Comp Set and New Jersey Direct Spending Volume: % Change by Travel Segment (FY2005 vs. FY2006p)



	U.S. FY06p/FY05	Comp Set FY06p/FY05	New Jersey FY06p/FY05
Total	6.2%	8.6%	10.2%
Business	3.0%	8.6%	-5.5%
Leisure	7.5%	8.7%	14.9%
Day	8.2%	18.9%	4.1%
Night	5.7%	6.2%	12.0%
Day Business	5.5%	7.0%	-4.6%
Day Leisure	9.5%	24.1%*	6.9%
Night Business	2.4%	8.9%	-5.8%
Night Leisure	7.1%	5.1%	17.2%

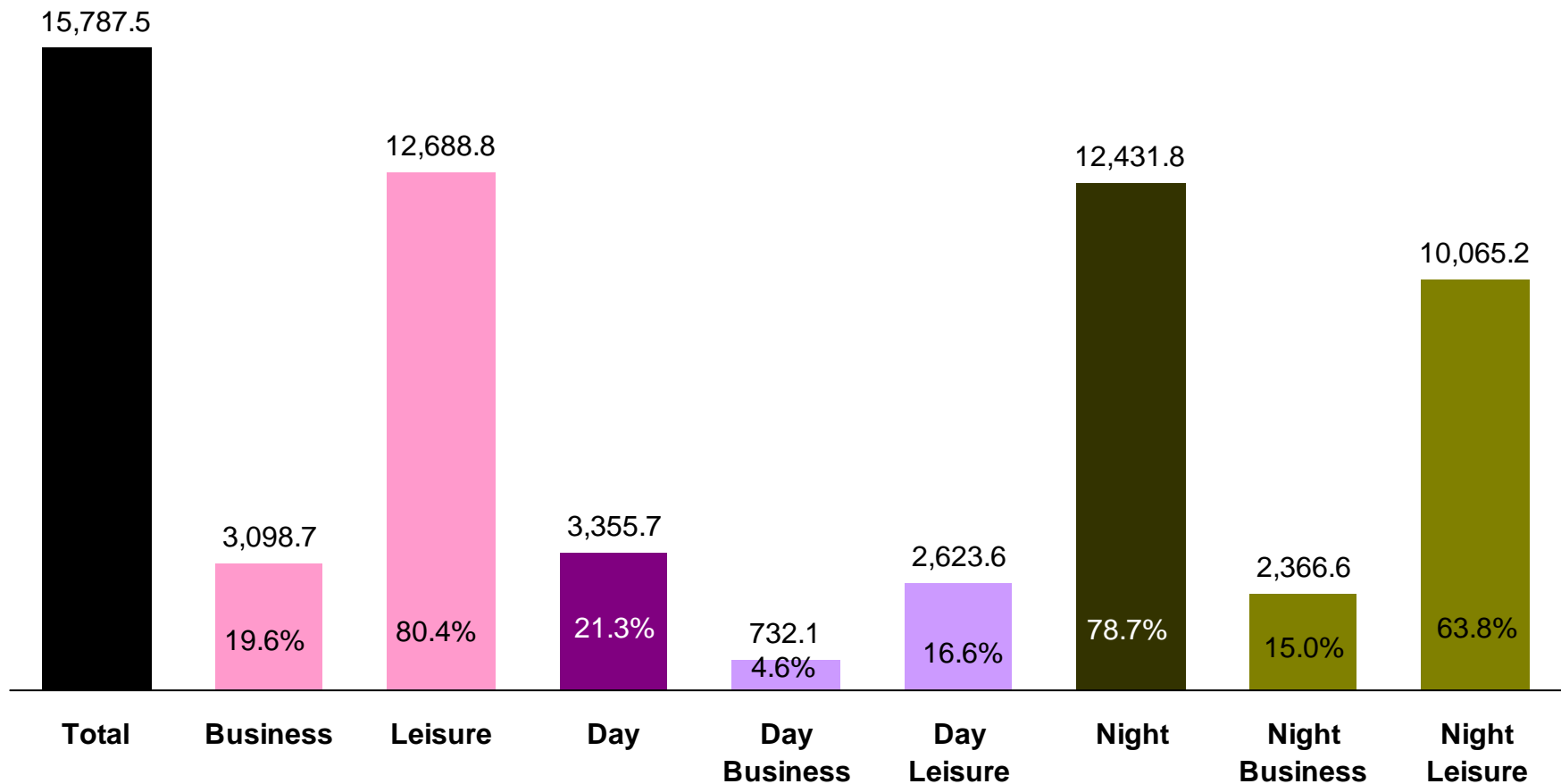
Note: Day leisure Direct Spending for comp set is up 24.1% due to air spending is up 41%.

New Jersey Person-Stays Volume Summary (FY2006p/Million)





New Jersey Direct Spending Volume Summary (FY2006p/\$/Million)





New Jersey Market Share Overview

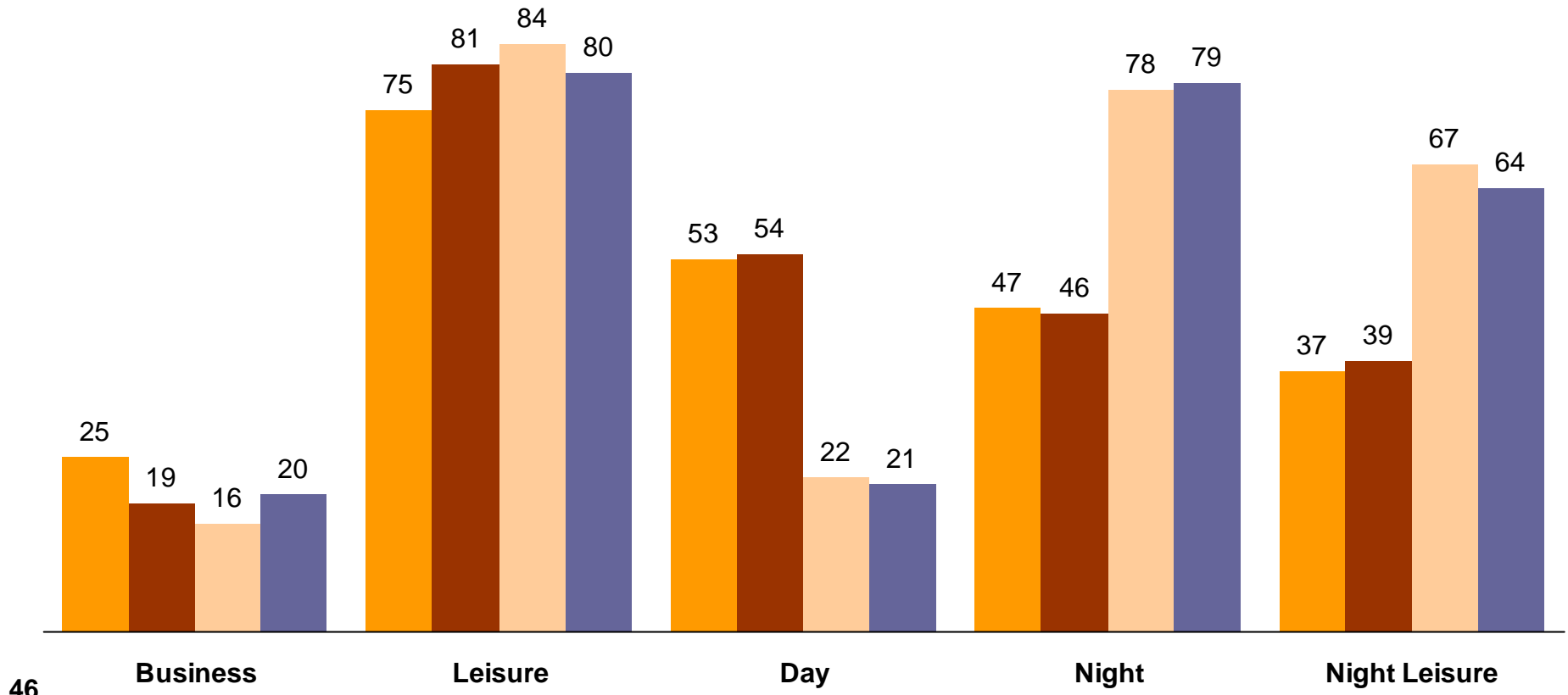


- The leisure and day segments contribute the most to New Jersey's travel volume when measured in Stays and Person-Stays.
- When considering Person-Days and Direct Spending, leisure and overnight are the largest contributors to New Jersey's total volume.

New Jersey Travel Segments (FY2006p/% of Total Volume)

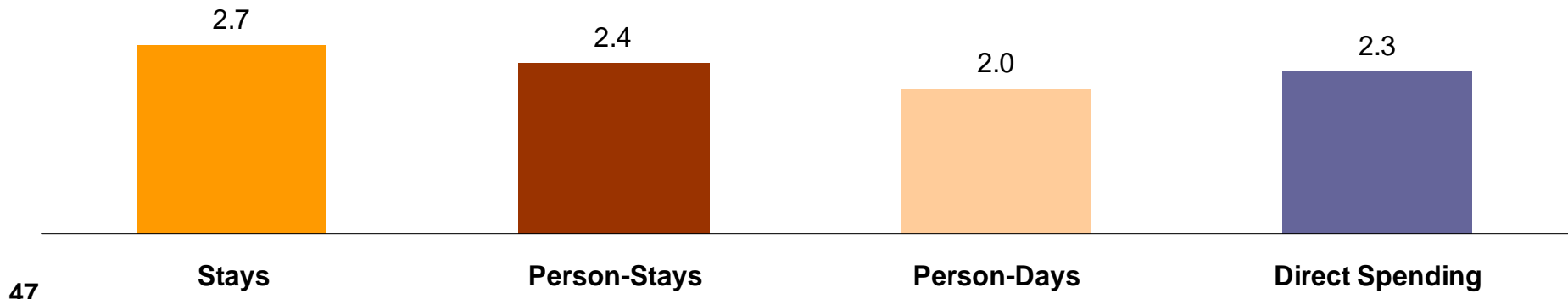


■ Stays
 ■ Person-Stays
 ■ Person-Days
 ■ Direct Spending





New Jersey Share of U.S. Travel: (FY2006p/% of Overnight Leisure Travel)





Destination Satisfaction/Value Intelligence



- Travelers rate each destination visited for overall satisfaction and overall value on a 10-point scale, where 1 is lowest or “poor” and 10 is highest or “excellent”.
- The following chart shows each destination’s satisfaction and value ratings. The chart plots the percentage of top three (net) ratings on ten-point satisfaction and value scales.
- The chart is separated into four quadrants representing the four combinations of satisfaction and value scores--high satisfaction-high value, high satisfaction-low value, low satisfaction-high value, and low satisfaction-low value.
- The Excellent Satisfaction ratings for New Jersey and the competitive set increased in FY2006p, while the U.S. remained almost unchanged. The U.S. and competitive set are still rated higher in Satisfaction than is New Jersey.
- The Excellent Value ratings for the U.S., New Jersey and competitive set all increased in FY2006p. New Jersey is still given lower Excellent Value ratings than either the U.S. or the competitive set.



Excellent Destination Satisfaction vs. Value Ratings: U.S., New Jersey and Comp Set (FY2005 vs. FY2006p/% of Overnight Leisure Travel Person-Stays)



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Age
Children in Household
Household Income
Lifestage
Traveler Generation



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

CHARACTERISTICS	RECOMMENDED USE
<i>Demographics:</i> age, income and family status	For a basic description of travelers
<i>Lifestage:</i> a combination of a traveler's age, income, and family status	For media targeting
<i>Generation:</i> a group based on the traveler's year of birth	For content in public relations strategies and communications



- Travelers to New Jersey tend to be somewhat older than travelers to most competing destinations. The average age of New Jersey's Overnight Leisure traveler is 48, which is above that of the U.S. and each of the individual competitors in FY2006p. Most Overnight Leisure travelers to New Jersey are in the 35-54 age group, followed by travelers in the 55 years and older age group.
- The 35-54 age group on average spends more per party per trip than the New Jersey average (\$770), while the other two age groups both spend less per party per trip than the State average, making them financially less valuable groups.
- Overnight Leisure travelers to New Jersey have fewer children than any of its competing destinations, more than four-fifths of Overnight Leisure travelers to New Jersey do not have children under 18 in their household.
- With an average household income of \$82,600 and 59% earning \$75,000 or more, Overnight Leisure travelers to New Jersey tend to be in the higher income brackets as compared to the U.S. average and to individual competitors.
- Most New Jersey Overnight Leisure Person-Stays are comprised of travelers in the Maturing & Free Lifestage, followed by the Affluent Mature Lifestage. Compared to its competitors, New Jersey has the smallest share of Young Family Overnight Leisure travelers.



Targeting Intelligence Overview (Con't)



- Most Lifestage groups, except Young & Free and Moderate Mature, spend more per trip than the average New Jersey Overnight Leisure travel party. This makes them, financially, the most valuable travelers as compared to the Lifestages that spend less than the State average.
- The Boomer generation, followed by GenXers, accounts for the largest proportion of Overnight Leisure Person-Stays for New Jersey. GenXers represent the largest share of Overnight Leisure Person-Stays for the U.S. and the competitive set.
- In terms of spending by different generations, Boomers spend the most per party per trip while the GI generation spends the least (\$555) per party per trip. Other generations all spend very close to the New Jersey average of \$770.



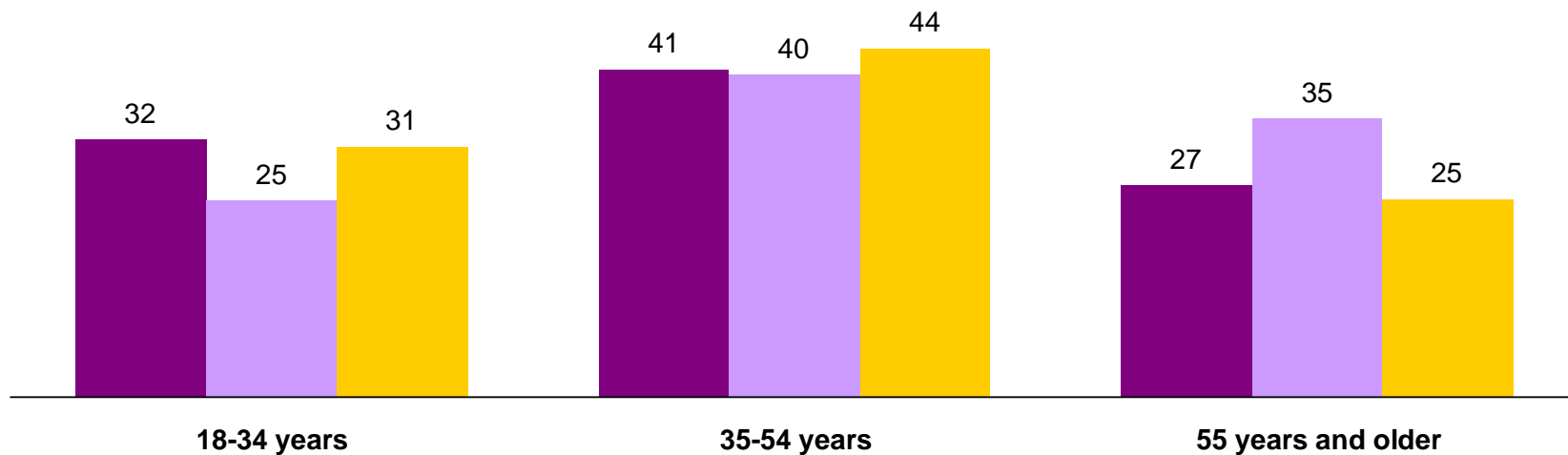
Age Distribution: U.S., New Jersey and Comp Set (FY2006p /% of Overnight Leisure Travel Person-Stays)



■ U.S. (45 years*)

■ New Jersey (48 years*)

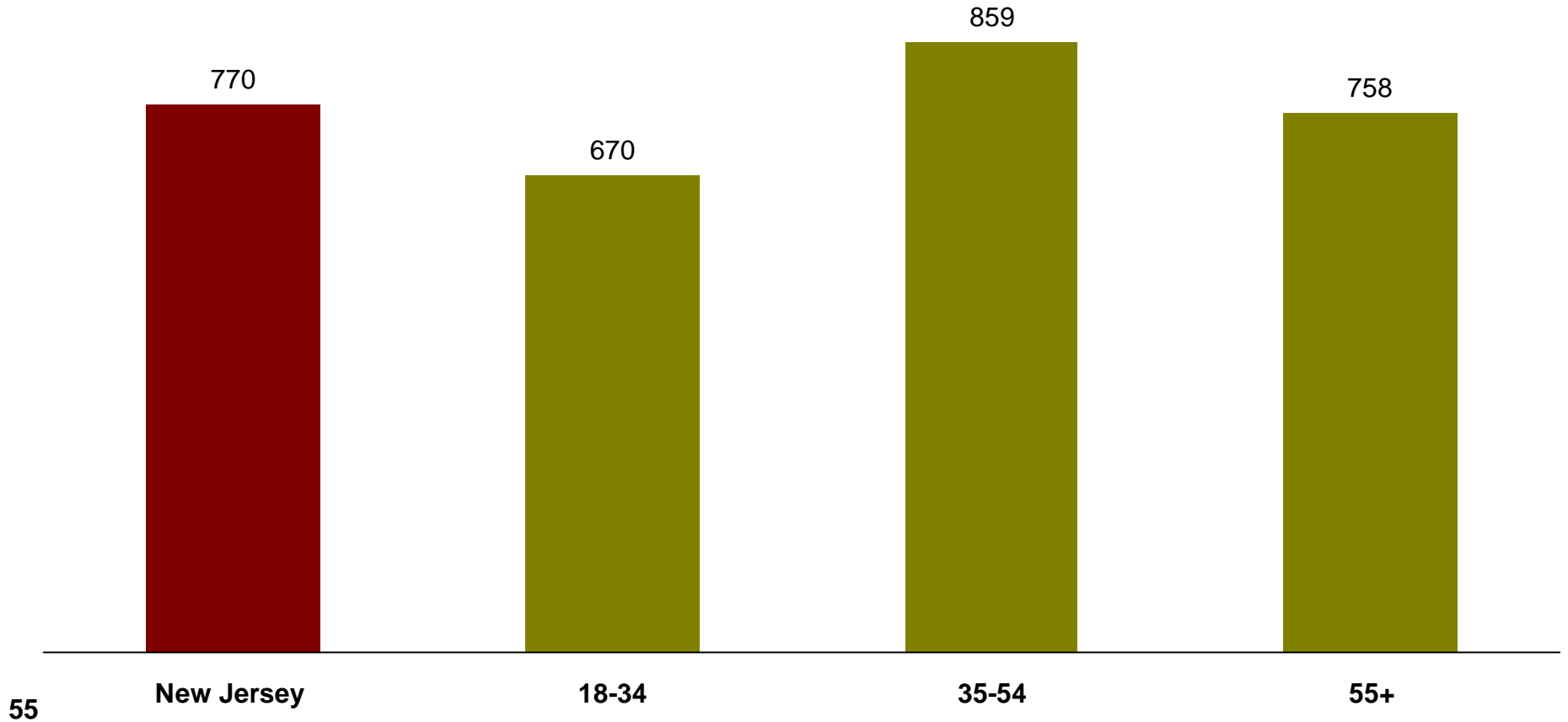
■ Comp Set (45 years*)



54 * Average in Parentheses



New Jersey Avg. Party per Trip Spending by Age (FY2004-FY2006p/\$ Overnight Leisure Travel Stays)



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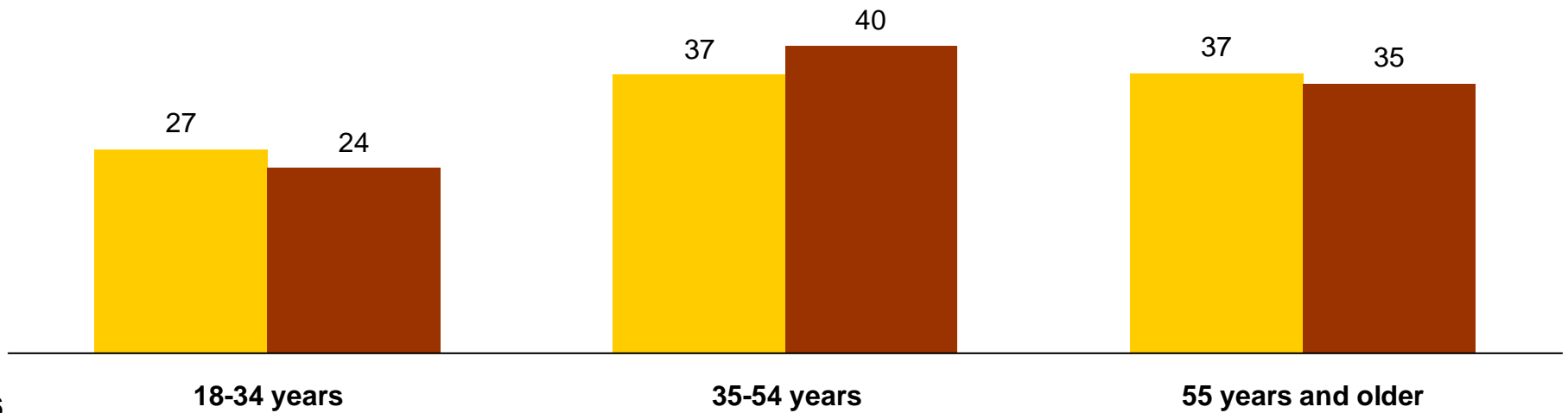


New Jersey Age Comparison (FY2004-FY2006p/% of Overnight Leisure Travel)



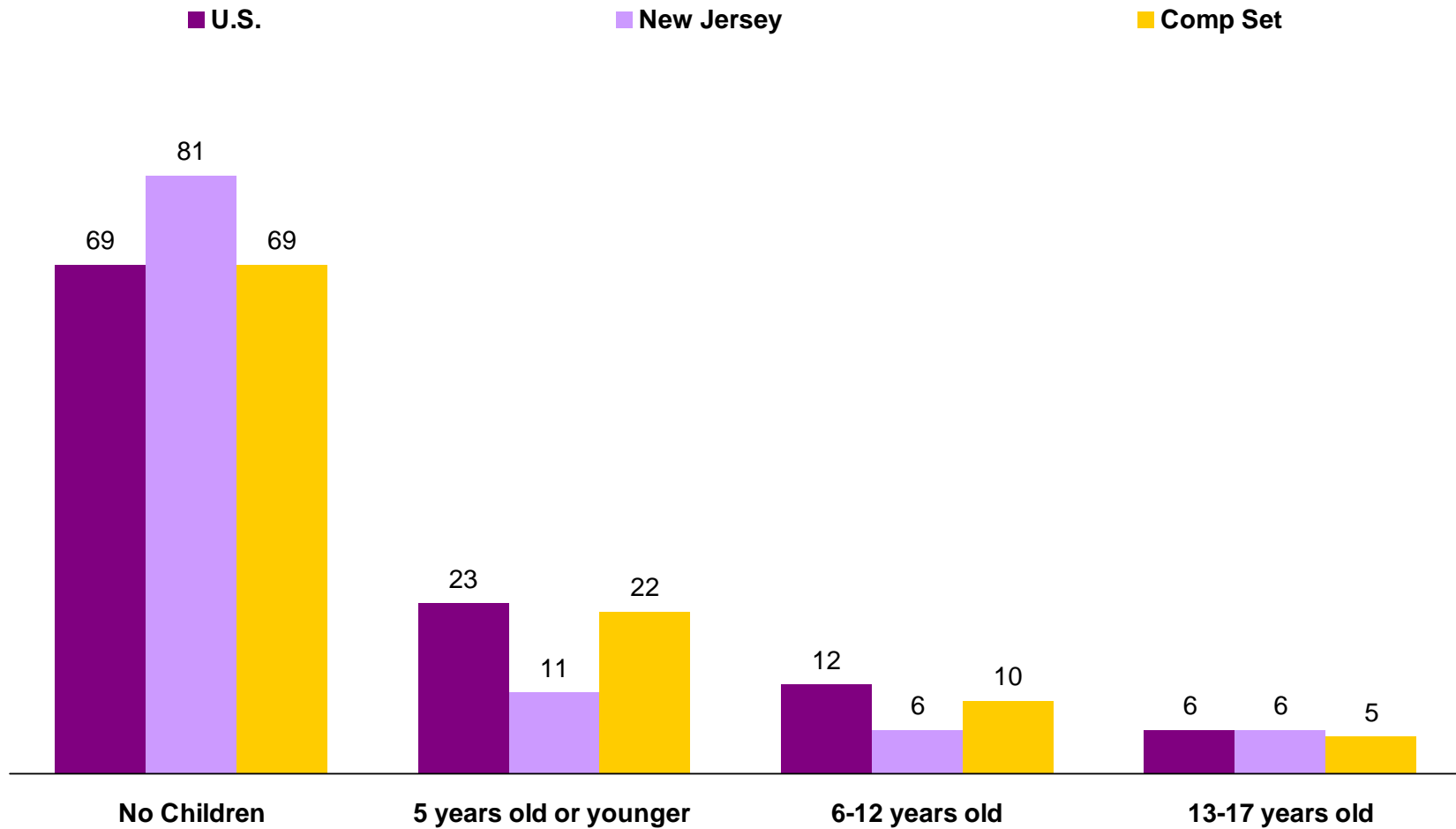
■ Stay Based

■ Trip-Dollars Based





Distribution of Children in Household: U.S., New Jersey and Comp Set (FY2006p /% of Overnight Leisure Travel Person-Stays)



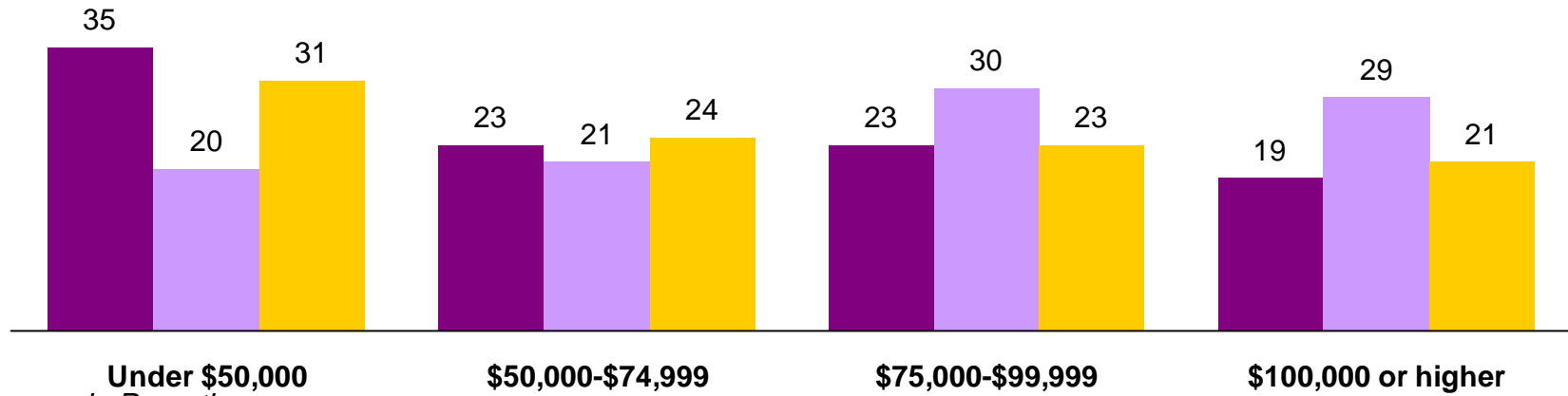
57 Note: Sum exceeds 100% due to multiple-children households.



Household Income Distribution: U.S., New Jersey and Comp Set (FY2006p /% of Overnight Leisure Travel Person-Stays)



■ U.S. (\$69,700*)
 ■ New Jersey (\$82,600*)
 ■ Comp Set (\$72,300*)



58 * Average in Parentheses



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

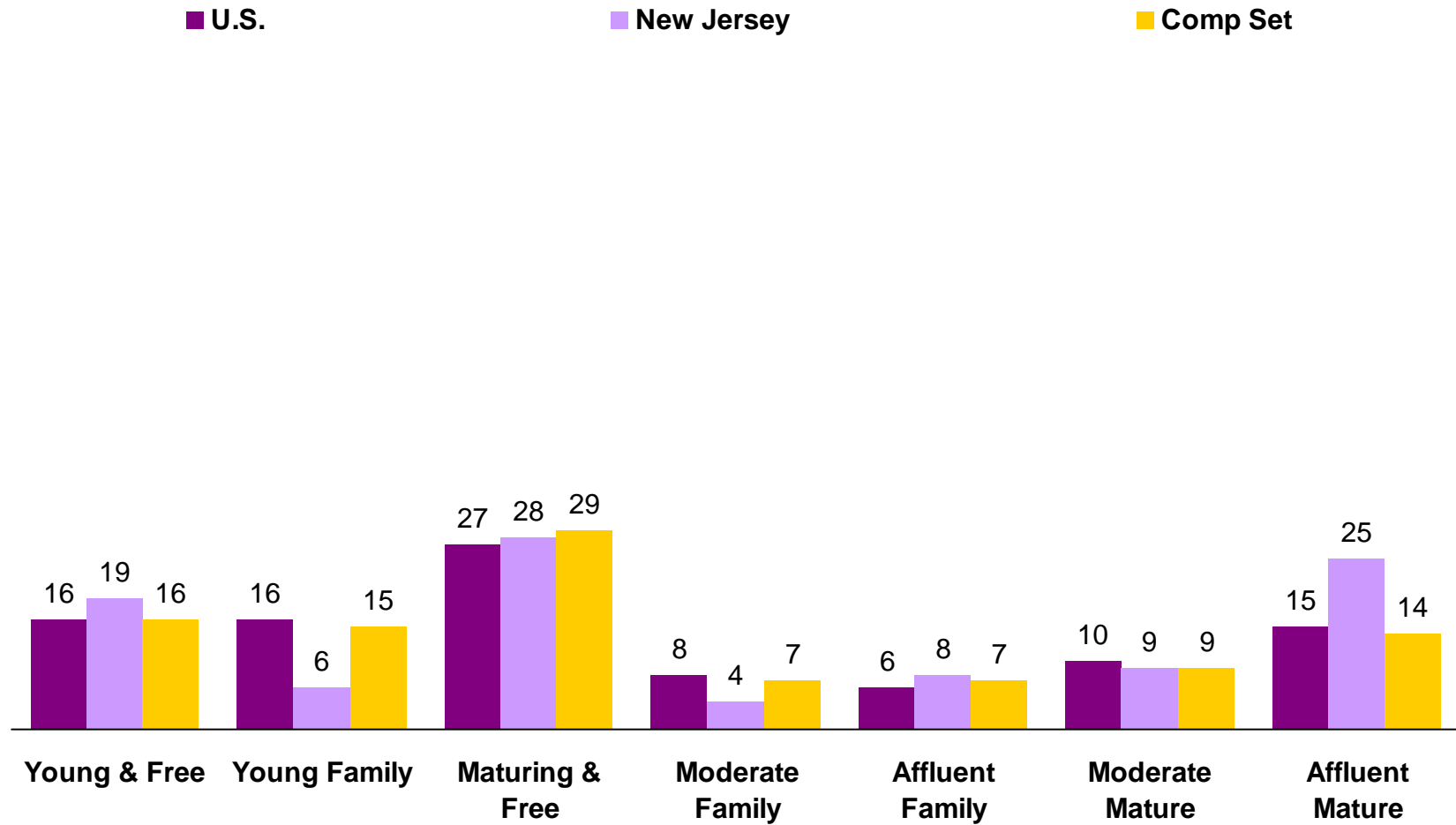
- 1) age
- 2) household income, and
- 3) presence of children in the household

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

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



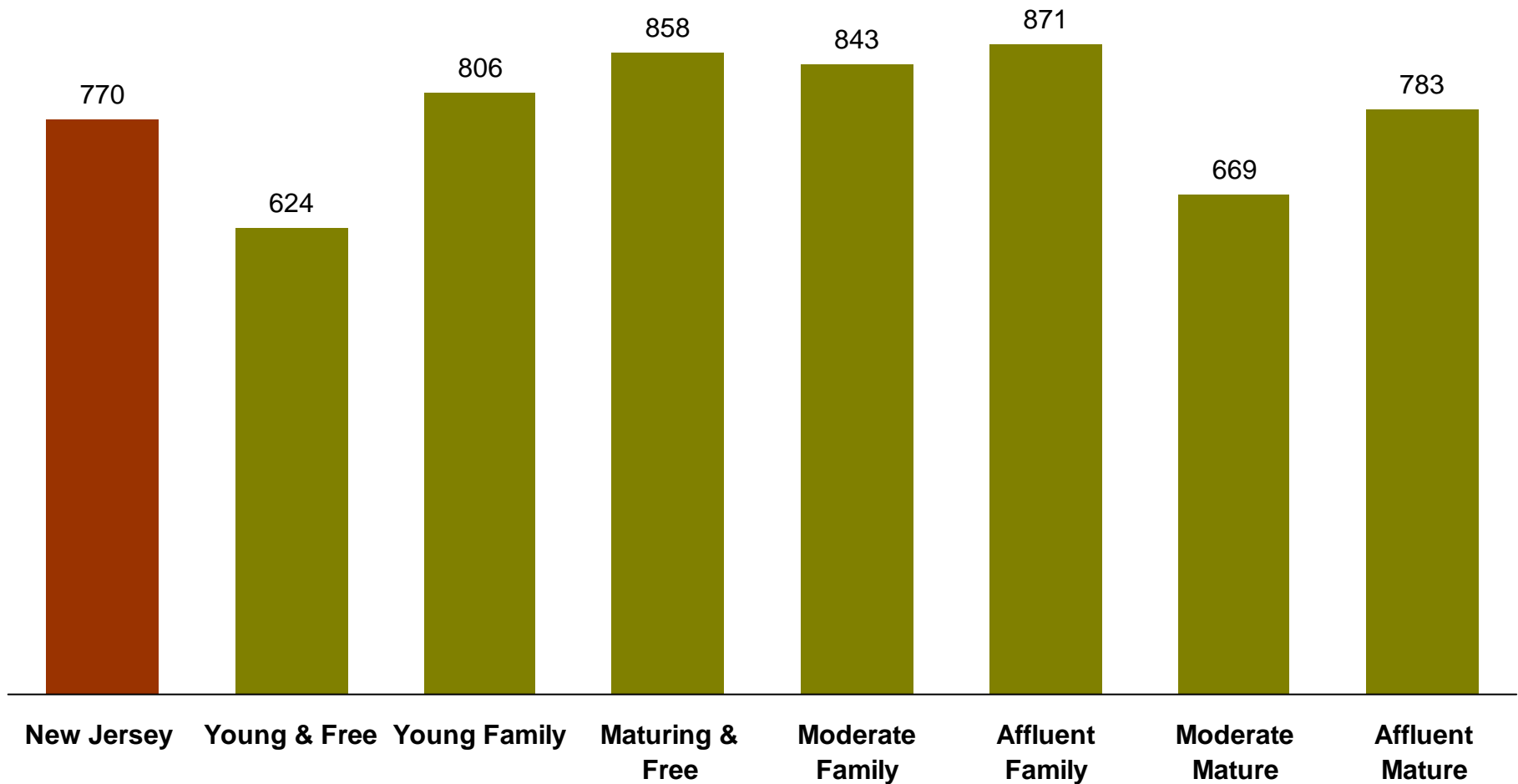
Lifestage Distribution: U.S., New Jersey and Comp Set (FY2006p /% of Overnight Leisure Travel Person-Stays)





New Jersey Avg. Party per Trip Spending by Lifestage

(FY2004-FY2006p/\$ Overnight Leisure Travel Stays)

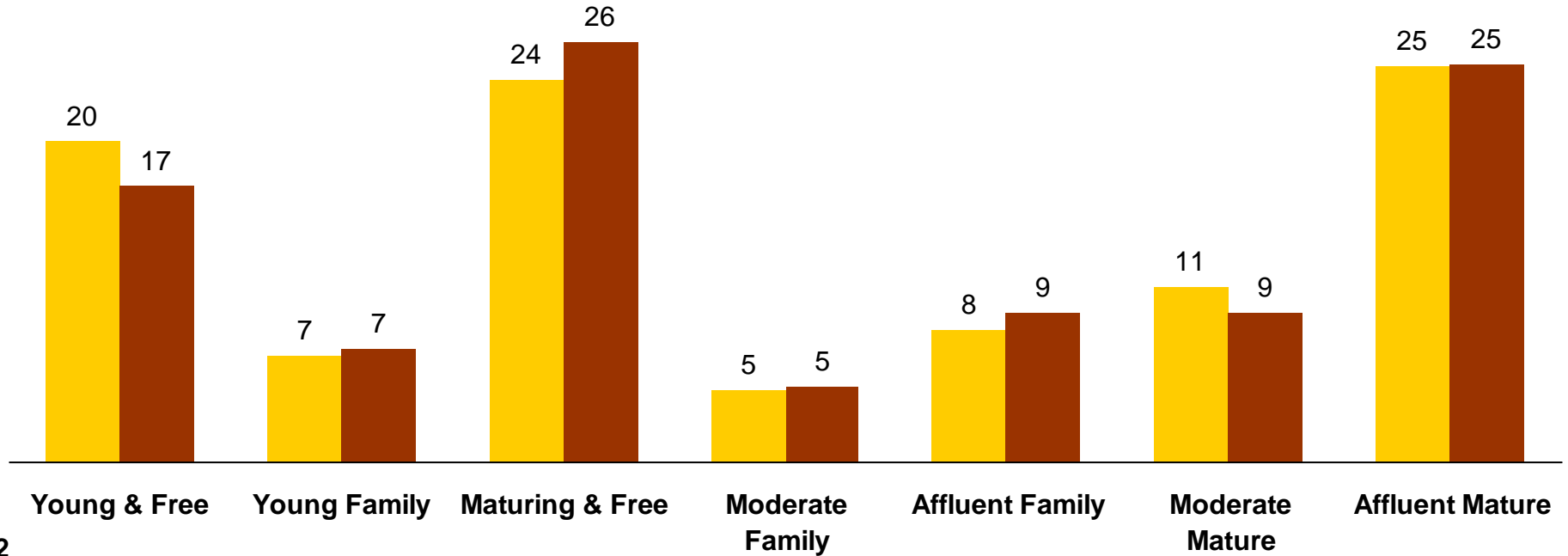


New Jersey Lifestage Distribution (FY2004-FY2006p/% of Overnight Leisure Travel)



■ Stay Based

■ Trip-Dollar based





Traveler Generation Analysis



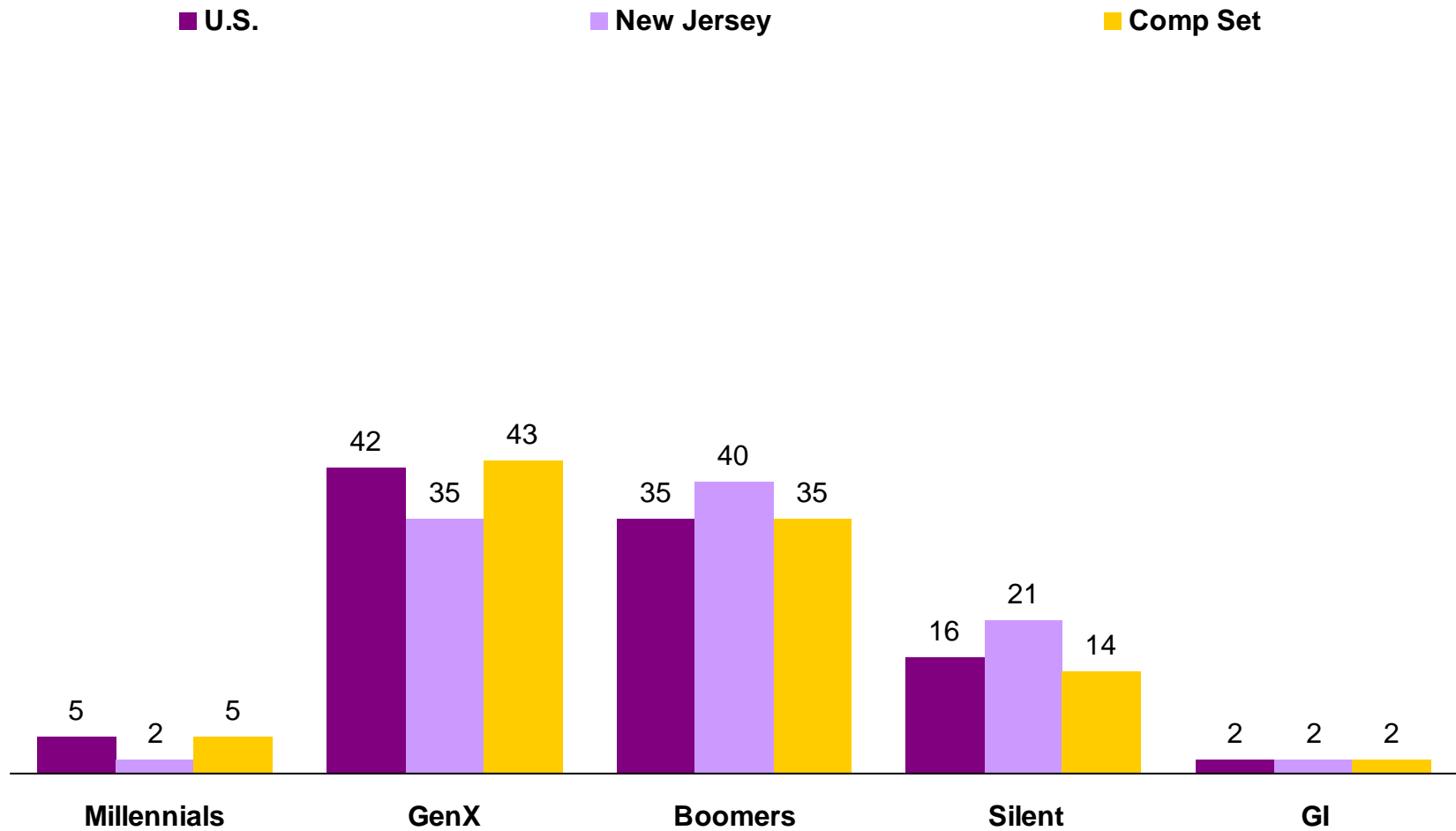
With an increasing interest in generational behavior, DKS&A has added a Traveler Generation Analysis to help destinations understand the composition of their visitors in terms of the generations they represent. The analysis will supplement other demographic profiles (age and Lifestage) by adding a means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

The following defines the generations by year of birth:

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



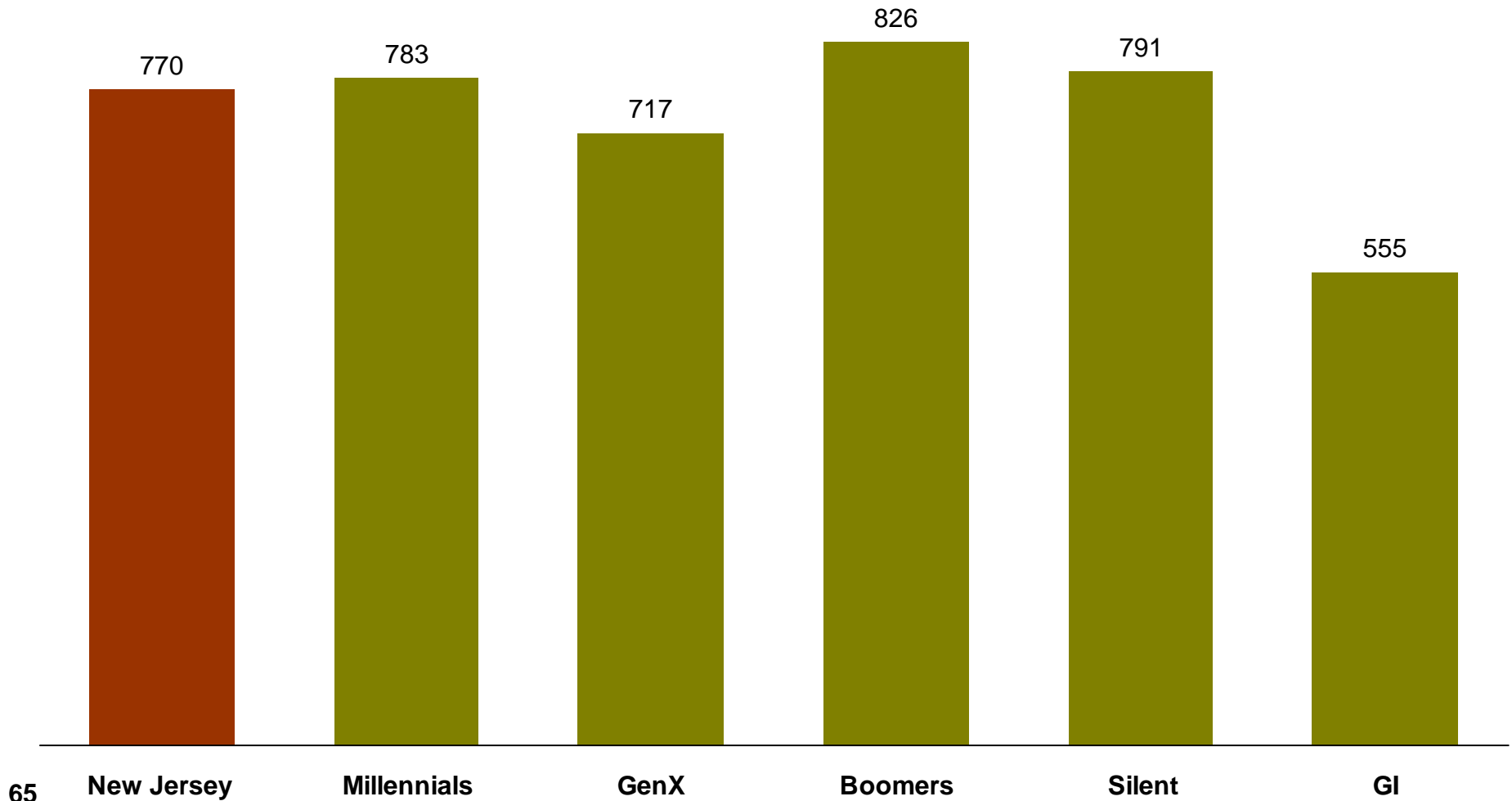
Traveler Generation Distribution: U.S., New Jersey and Comp Set (FY2006p/% of Overnight Leisure Travel Person-Stays)





New Jersey Avg. Party per Trip Spending by Generation

(FY2004-FY2006p/\$ Overnight Leisure Travel Stays)



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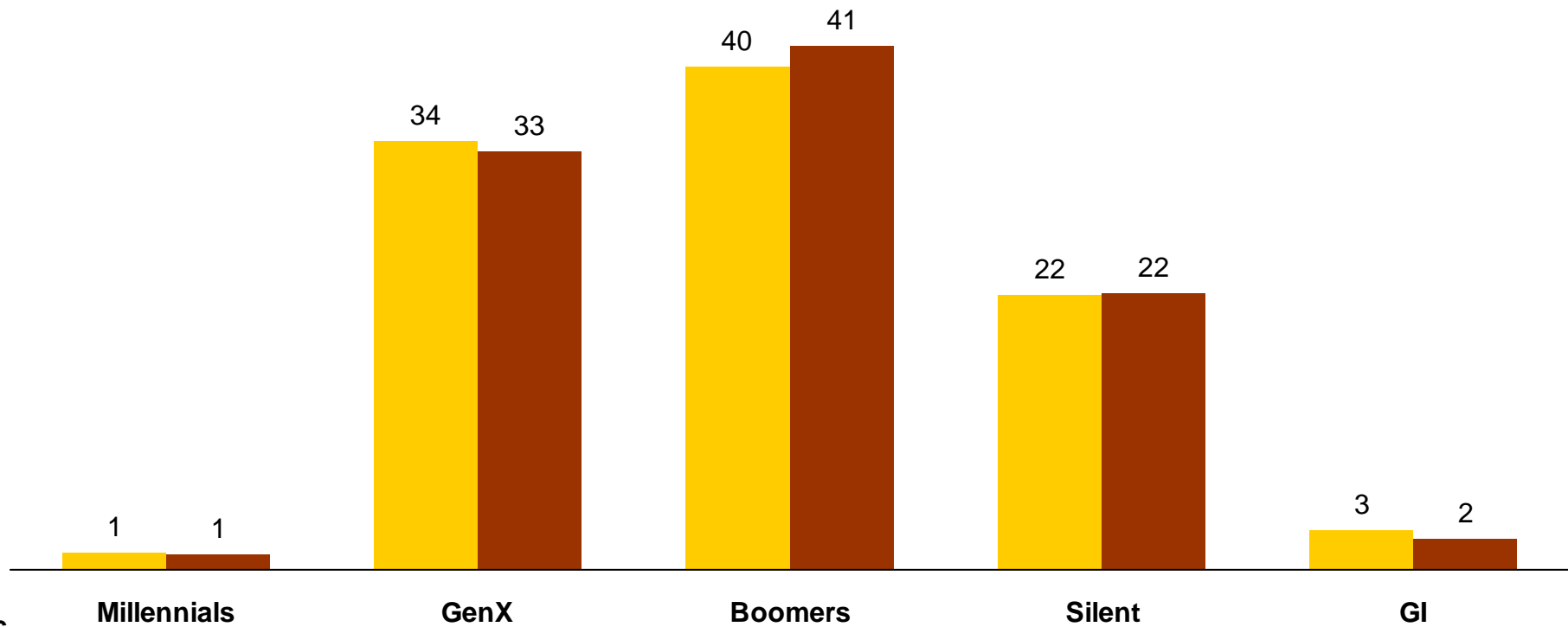
New Jersey Traveler Generation Comparison

(FY2004-FY2006p/% of Overnight Leisure Travel)



■ Stay based

■ Trip-Dollars Based





- Purpose of Stay***
- Travel Party Composition***
- Stay Length***
- Daily Spending per Person***
- Activities***
- Mode of Transportation***
- Trip Timing***
- Accommodation Type***



- The Positioning section will help a destination compare its tourism product attributes against the competition. These attributes include a traveler's purpose of visit, Stays composition, activities participated in at the destination, and repeat visitation. This intelligence highlights a destination's product strengths that can be promoted to attract new travelers or repeat visitors. It can also help destinations better differentiate themselves in a competitive travel market.
- The following bullet points will define some details that will be found in the *Positioning* section.
 - *Visit Friend/Relative* is a visitor's purpose of stay and represents visiting friends and relatives.
 - Stays composition
 - *Family Stays* is defined as one or more adults accompanied by one or more persons under age 18. The child does not necessarily have to live in the household.
 - *MM/FF Stays* include either two females or two males from different households traveling together
- Five attributes (purpose of stay, party composition, stay length, trip timing, and accommodation type) include an additional analysis in this section that compares the segment's share of the destination's total visitors compared to their spending contribution in the market. This analysis is illustrated by comparing the proportions of total travel using a Person-Stays weighting versus a trip-dollars weighting. Trip-dollars weighting reflects the total Stays spending made by all party members at the destination.



Positioning Intelligence Overview



- The Stay Purpose distribution of New Jersey differs from that of the U.S. and the competitive set, with more than one-third of Overnight Leisure travelers being accounted for by those on Getaway Weekend trips, while the largest share of Overnight Leisure travel for the U.S. and the competitive set is to Visit Friends/Relatives.
- Over half the Overnight Leisure travelers to New Jersey are traveling for vacation-type purposes; either Getaway Weekends or General Vacations. Visit Friends/ Relatives accounts for the largest share of Overnight Leisure travel for each of New Jersey's competitors.
- As expected, Per party per trip spending for New Jersey is lowest for the Visit Friends/Relatives segment, followed by Other Personal. The largest amount of spending comes from those on General Vacations. The share of Trip-Dollars is higher than the share of Stays for General Vacations, making this group financially valuable.
- Couples comprise half of New Jersey's Person-Stays, ranking the highest among the U.S., and the competitive set. Meanwhile, fewer travelers with children present choose New Jersey as their overnight travel destination as compared to the competition, resulting in New Jersey having the smallest average party size. With an average of 2.18 in FY2006p, New Jersey's Overnight Leisure party size is down over FY2005 (2.34). Small differences in average party size produce large differences in total Person-Stays (travelers).



Positioning Intelligence Overview (Con't)



- Three or More Adults and travel parties with Children Present are the only travel parties that spend more than the New Jersey average. The proportion of Trip-Dollars of these two groups is greater than the corresponding share of Stays, making them financially the most valuable travel parties. Although Couples spend less, on average, than the New Jersey average per party per trip, they represent the largest share of both Stays and Trip-Dollars.
- The length of stay in New Jersey decreased slightly in FY2006 as compared to FY2005 and continues to remain behind the U.S. as well as its competitive set.
- Travel parties staying 2-3 nights spend the most on average per trip. The ratio of Trip-Dollars to Stays is greater among all segments except those staying one night only, making this group less financially valuable. Those staying one night also spend less than the New Jersey average.
- Transportation makes up the smallest proportion of daily spending per person among New Jersey's Overnight Leisure travelers as compared to the U.S. average and each individual competitor. When transportation is removed, the top spending category for the U.S. and the competitive set is Food, while for New Jersey, Entertainment comes in first place.



Positioning Intelligence Overview (Con't)



- New Jersey has a much higher proportion of visitors engaged in Gambling, Dining, Entertainment, Night Life and Beach, Waterfront activities than either the U.S. or the competitive set. It is important to keep in mind that activity data weighted by Person-Stays assumes that each travel party member participated in the activity at least once during the stay in the destination.
- The New Jersey Activity Index uses the U.S. to determine the average of 100. Anything with an index score over 100 is an activity a New Jersey visitor is more likely to do than a visitor to the average U.S. destination. With index scores ranging from 103 for Shopping to 561 for Gambling, nine out of New Jersey's top ten activities are above the U.S. average.
- Average party per trip spending is above New Jersey's average for almost every activity. For all activities the share of Trip Dollars is greater or equal to the share of Stays, indicating that nearly all activity participation is financially valuable to the State.
- For New Jersey as well as each of its competitors, most Overnight Leisure travelers arrive by auto. The share of auto usage is greater for New Jersey and most of its competitors than for the average U.S. destination.
- The majority of overnight leisure travel to New Jersey as well as to the U.S. and competitive set occurs in the third quarter (July – September) of the year. July and August are the most popular months for travel to New Jersey.



Positioning Intelligence Overview (Con't)



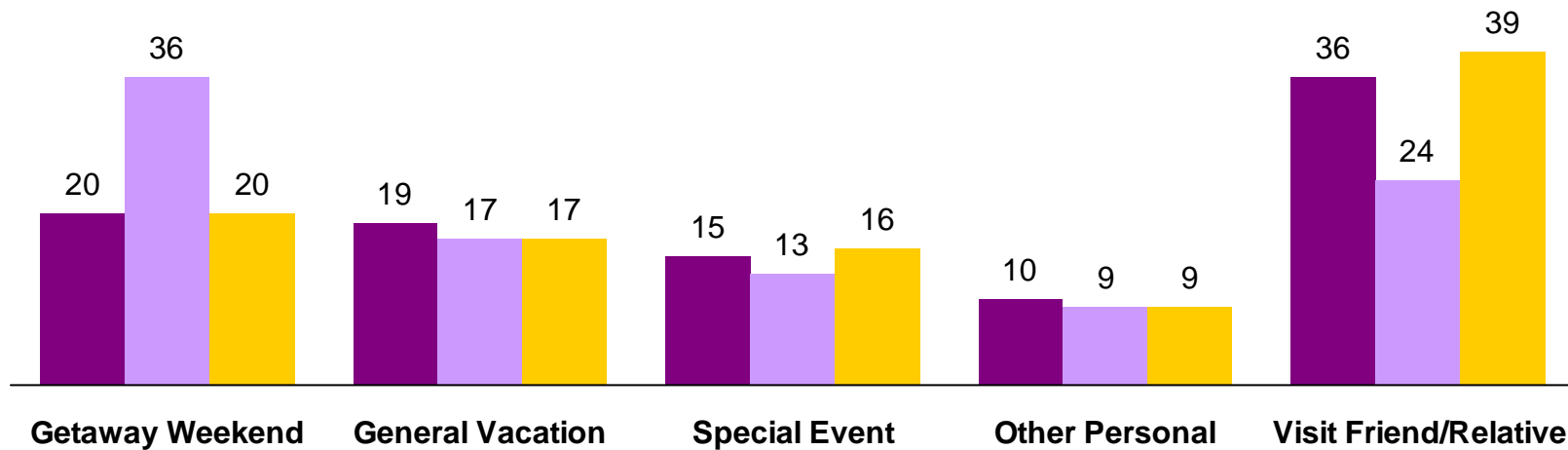
- Travel parties visiting New Jersey in the third quarter spend the most on average per trip. The share of Trip-Dollars is greater than the share of Stays during the third quarter making this quarter financially valuable for the State.
- The largest portion of Overnight Leisure Person-Stays in the U.S., New Jersey and in each of the competitors stay in hotels or motels. New Jersey by far hosts the largest share of visitors staying in hotels or motels and the lowest share of travelers staying in private homes than does the average U.S. destination or the competitive set. As expected those staying in paid accommodations spend the most and are therefore more valuable travel parties.



Purpose of Stay Distribution: U.S., New Jersey and Comp Set (FY2006p /% of Overnight Leisure Travel Person-Stays)

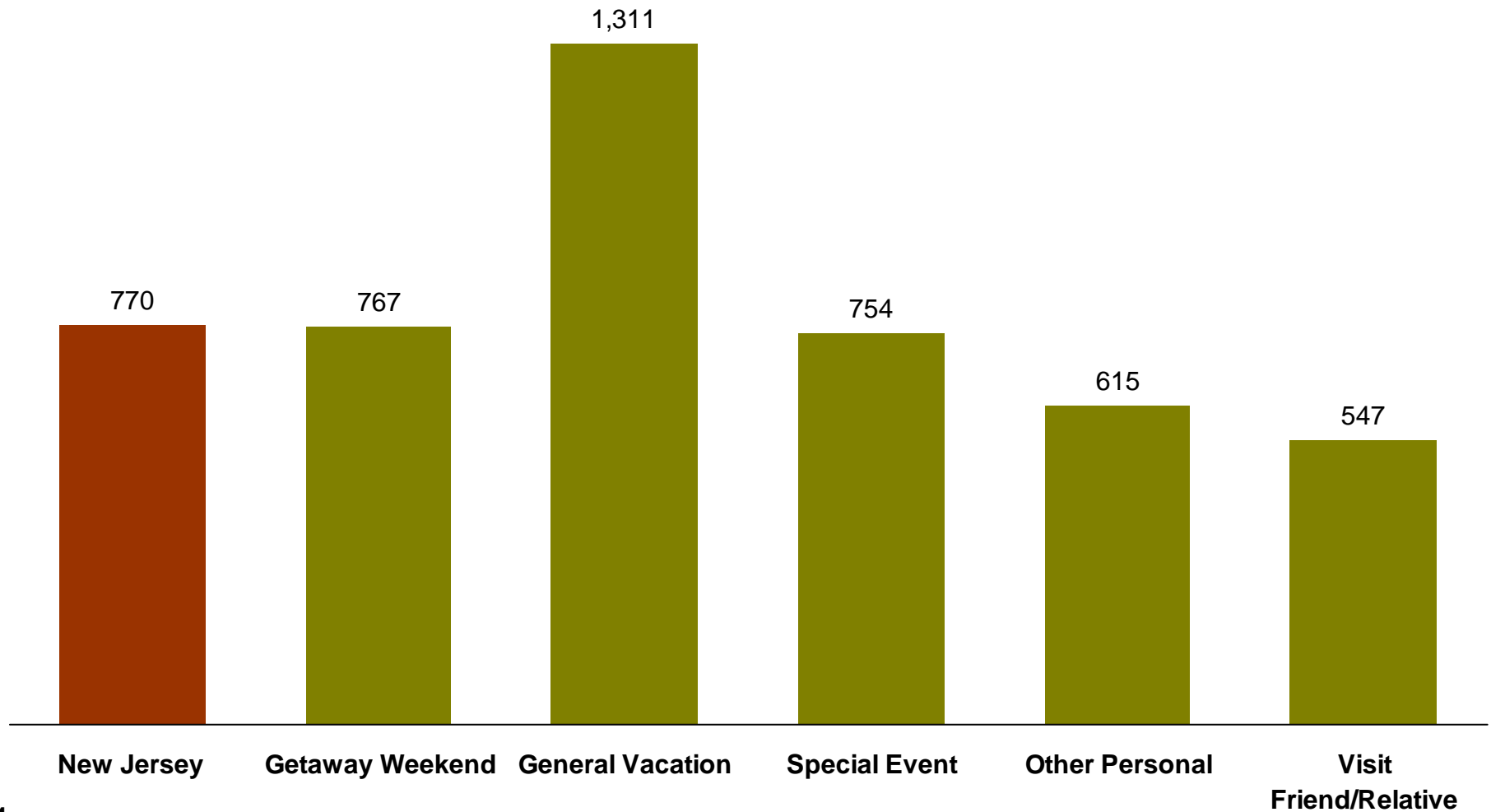


■ U.S. ■ New Jersey ■ Comp Set





New Jersey Avg. Party per Trip Spending by Purpose of Stay (FY2004-FY2006p/\$ Overnight Leisure Travel Stays)



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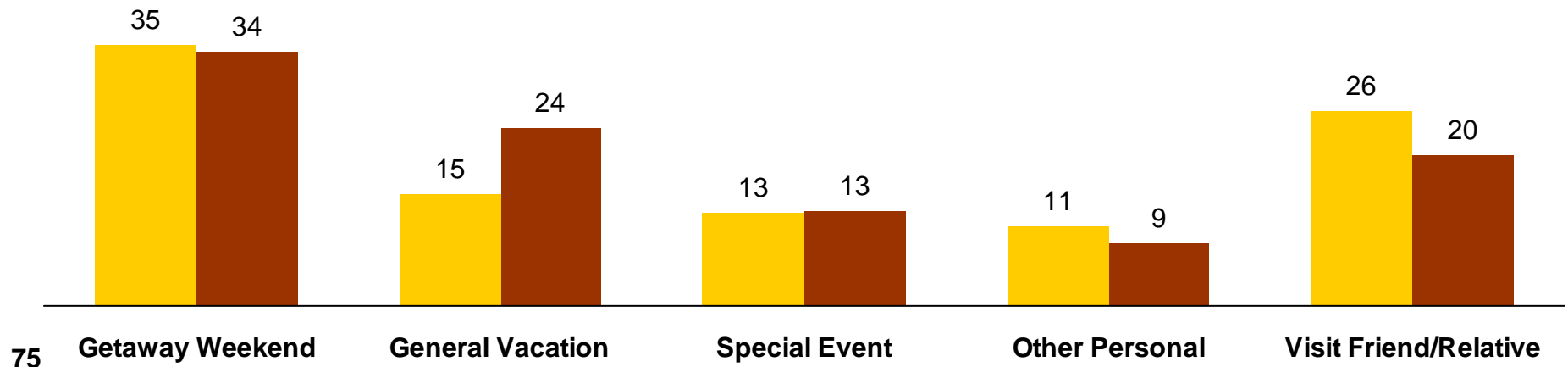


New Jersey Purpose of Stay Comparison (FY2004-FY2006p/% of Overnight Leisure Travel)



■ Stay Based

■ Trip-Dollars Based



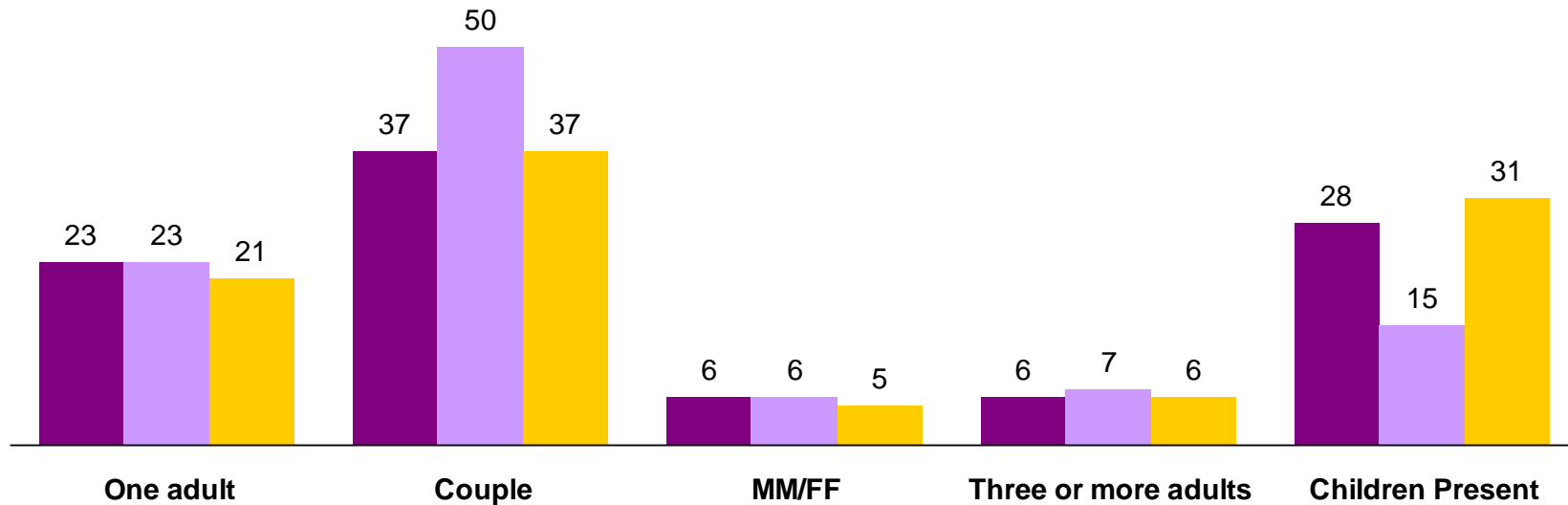
75



Travel Party Composition Distribution: U.S., New Jersey and Comp Set (FY2006p /% of Overnight Leisure Travel Stays)



■ U.S. (2.44 persons*)
 ■ New Jersey (2.18 persons*)
 ■ Comp Set (2.47 persons*)



76 * Average in Parentheses



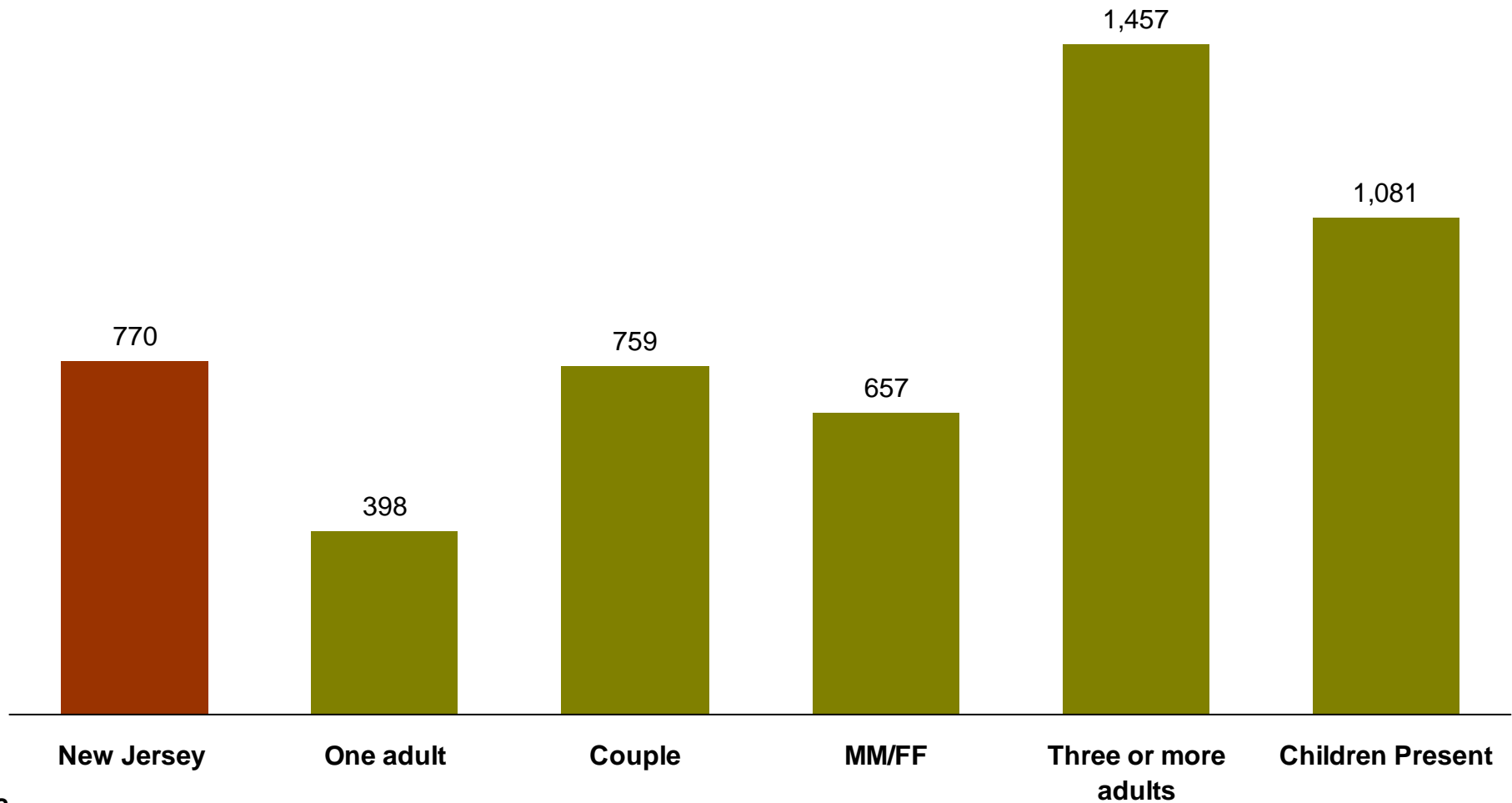
Average Travel Party Size Overview: U.S., New Jersey and Comp Set (FY2005 vs. FY2006p / % Overnight Leisure Travel Stays)





New Jersey Avg. Party per Trip Spending by Traveling Party

(FY2004-FY2006p/\$ Overnight Leisure Travel Stays)



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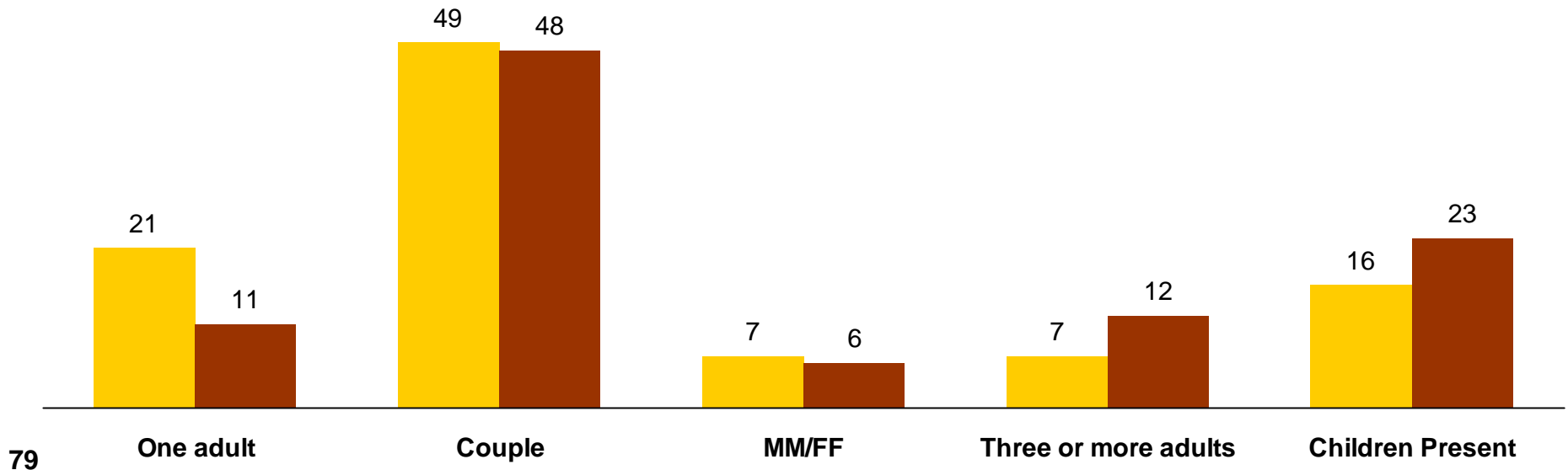


New Jersey Travel Party Composition Comparison (FY2004-FY2006p/% of Overnight Leisure Travel)



■ Stay Based

■ Trip-Dollars Based



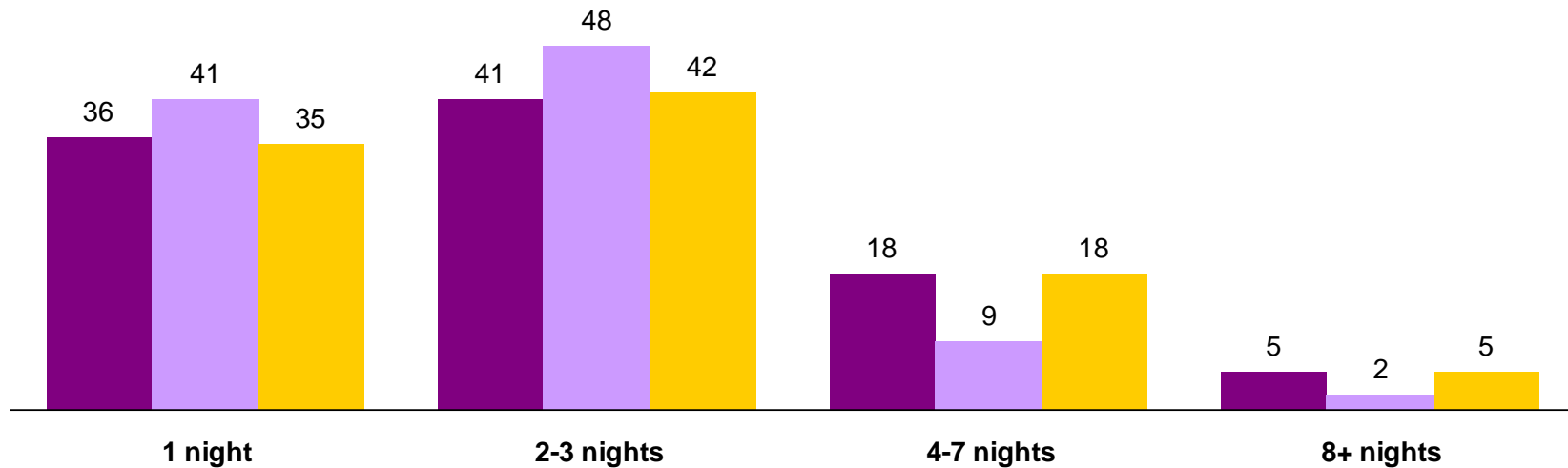
79



Stay Length Distribution: U.S., New Jersey and Comp Set (FY2006p /% of Overnight Leisure Travel Stays)



■ U.S. (2.91 nights*) ■ New Jersey (2.24 nights*) ■ Comp Set (2.85 nights*)



80 * Average in Parentheses



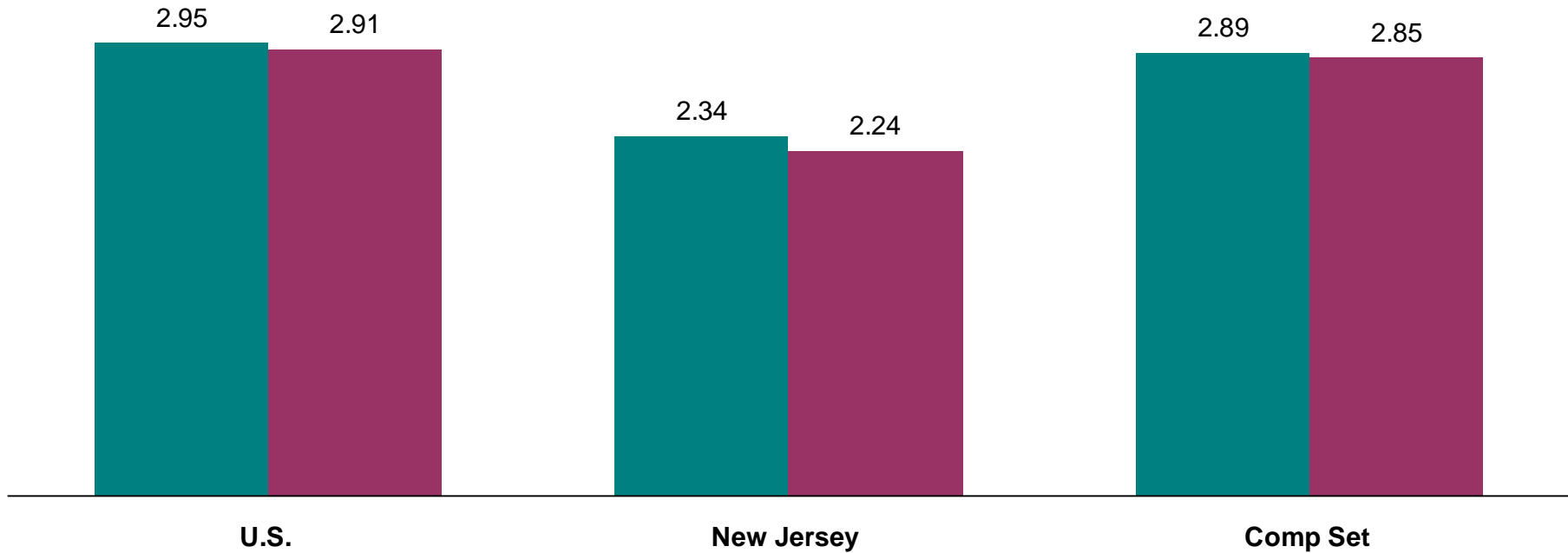
Average Length of Stay: U.S., New Jersey and Comp Set

(FY2005 vs. FY2006p /% of Overnight Leisure Travel Stays; 1+Night)



■ FY2006p

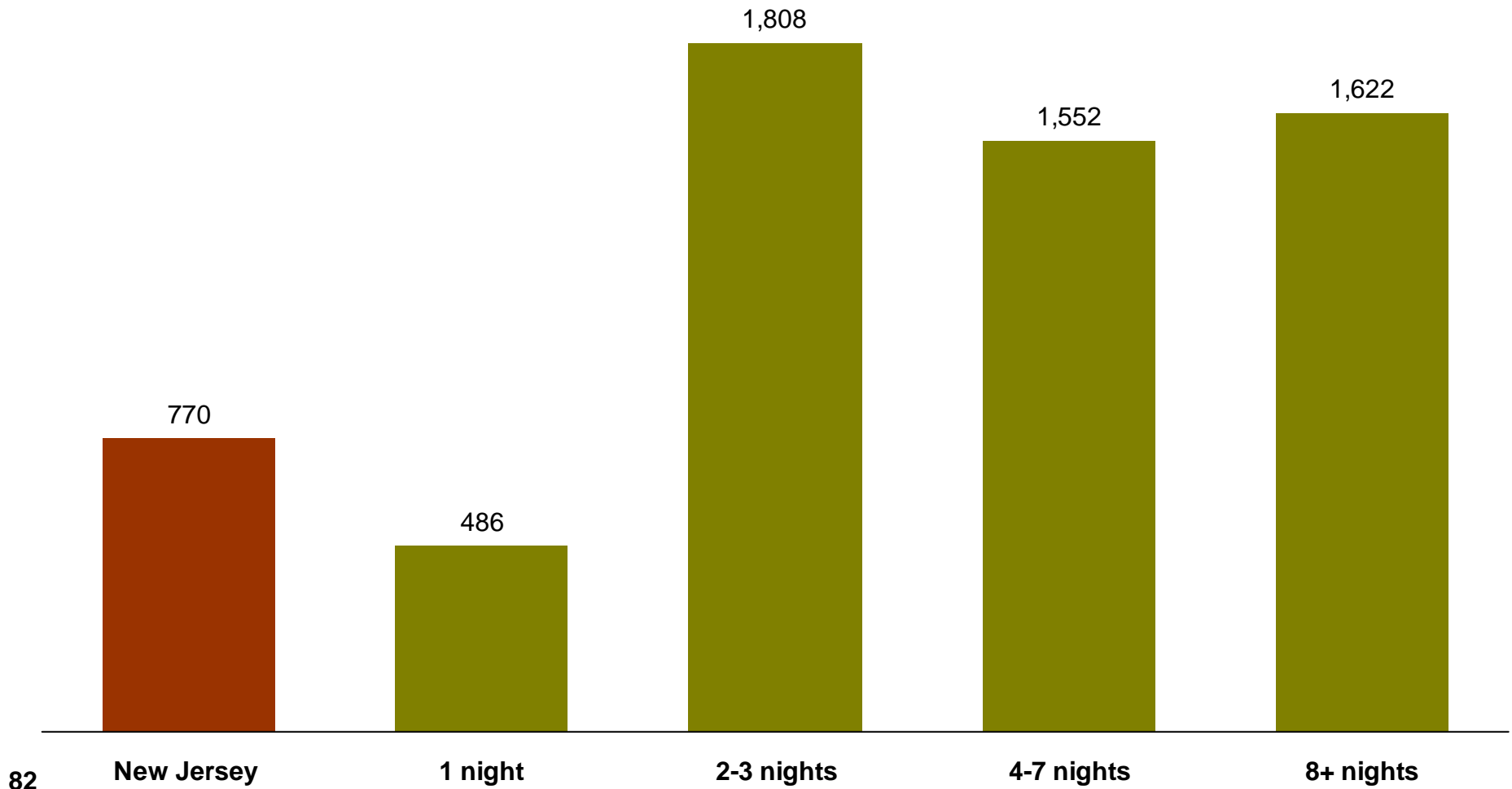
■ FY2005





New Jersey Avg. Party per Trip Spending by Stay Length

(FY2004-FY2006p/\$ Overnight Leisure Travel Stays; incl. Transportation)



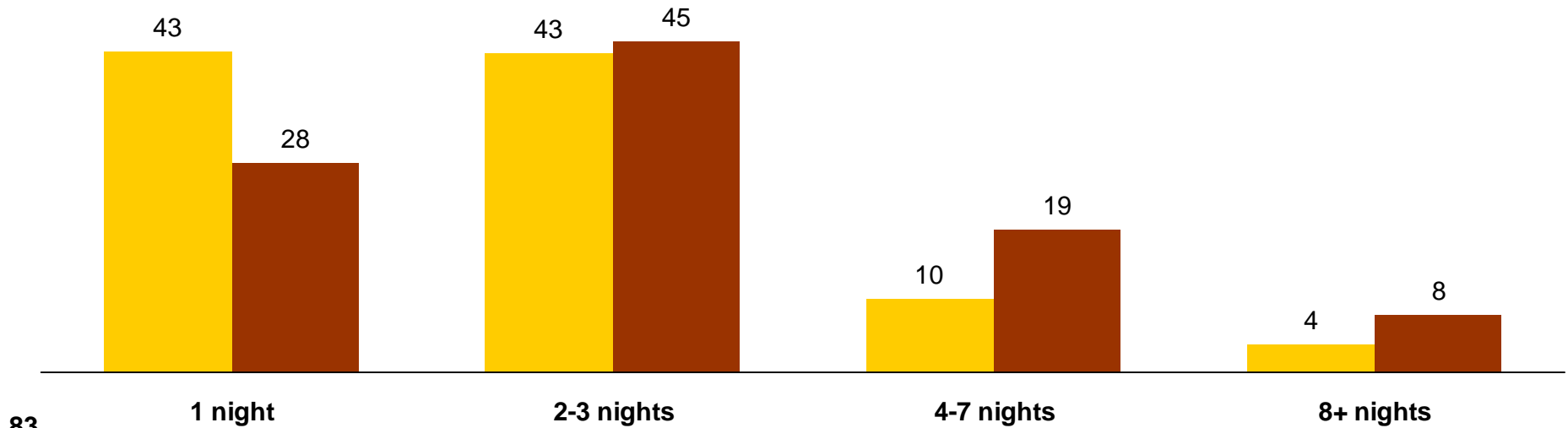
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New Jersey Stay Length Comparison (FY2004-FY2006p/% of Overnight Leisure Travel)



■ Stay Based

■ Trip-Dollars Based

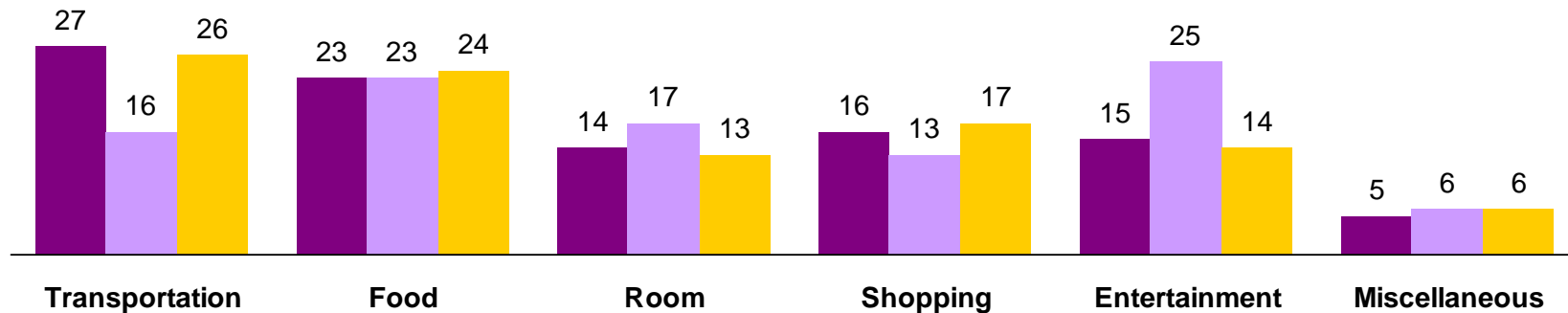




Daily Spending Per Person by Spending Category: U.S., New Jersey and Comp Set (FY2006p /% of Overnight Leisure Travel Person-Days)



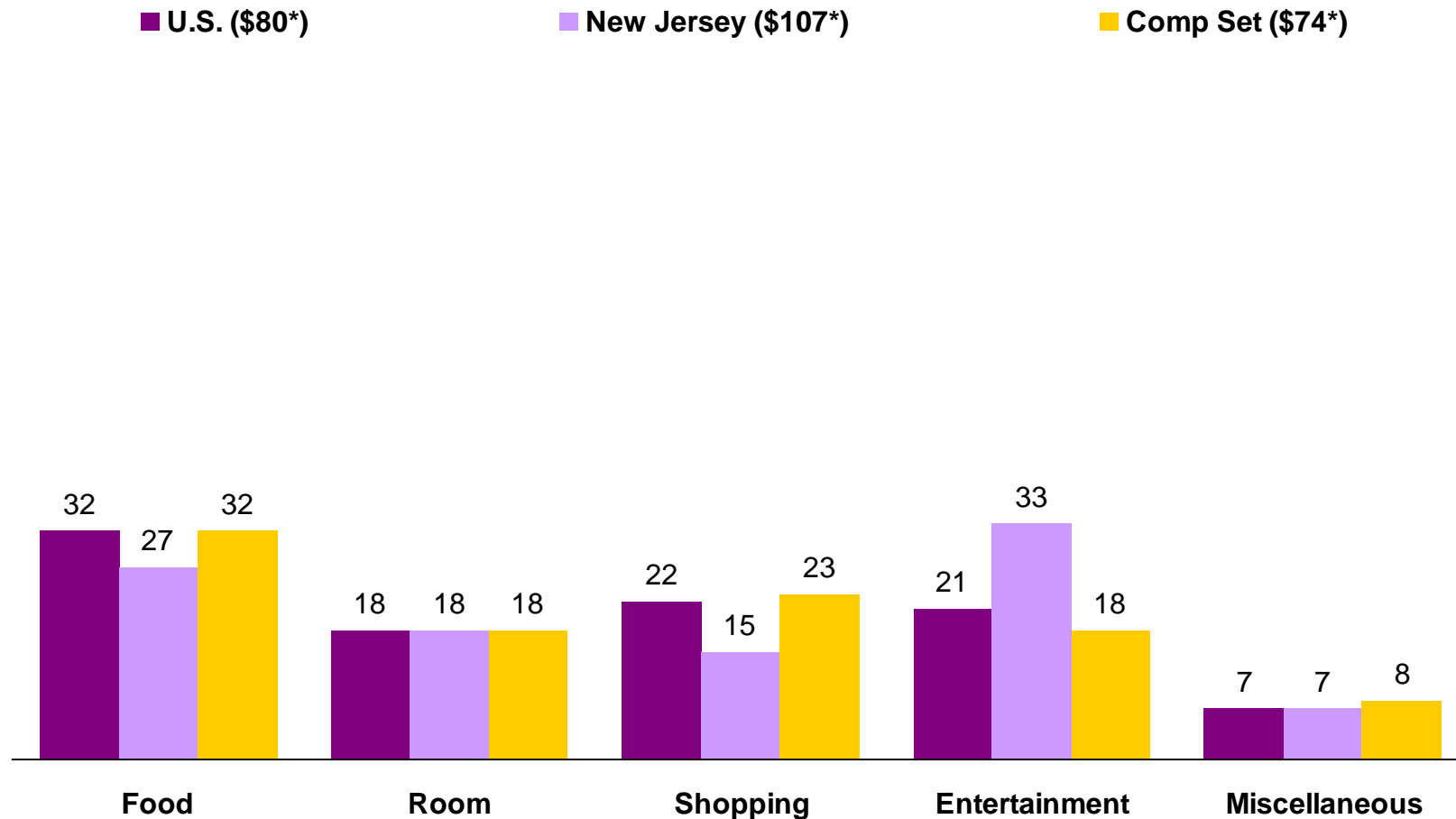
■ U.S. (\$105*)
 ■ New Jersey (\$115*)
 ■ Comp Set (\$93*)



84 * Average in Parentheses



Daily Spending Per Person by Spending Category: U.S., New Jersey and Comp Set (FY2006p /% of Overnight Leisure Travel Person-Days)



85 * Average in Parentheses



Top Activities at the Destination (FY2006p/% of Overnight Leisure Travel Person-Stays)



The following two charts show activities in which visitors participated at the destination on the trip. Data are sorted in descending order by New Jersey. Participation rates well above the U.S. averages are highlighted.

	U.S.	New Jersey	Comp Set
Gamble	8%	45%	3%
Dining¹	32%	40%	31%
Entertainment¹	24%	36%	21%
Shopping¹	25%	26%	25%
Night Life	8%	23%	6%
Beach, Waterfront	10%	22%	10%
Sightseeing¹	24%	11%	25%
Concert, Play, Dance	5%	7%	6%
Group Tour	4%	5%	4%
Theme Park, Amusement Park	8%	4%	7%

86 ¹ These activities are based on minimum spending levels. All other activity incidence is based on activities selected from a list.



Top Activities at the Destination (con't) (FY2006p/% of Overnight Leisure Travel Person-Stays)



The remaining activities are enjoyed by a small proportion of New Jersey overnight leisure visitors.

	U.S.	New Jersey	Comp Set
National or State Parks	9%	4%	10%
Watch Sports	5%	3%	5%
Visit Historic Site	7%	3%	10%
Festival, Craft Fair	4%	2%	5%
Shows (auto, boat, antique, etc.)	1%	2%	1%
Hike, Bike	5%	2%	4%
Nature, Eco-Travel	4%	1%	4%
Camping	5%	1%	5%
Hunt, Fish	4%	1%	4%
Museum, Art Exhibit	6%	1%	7%
Golf	2%	1%	2%
Boat, Sail	2%	1%	2%
Other Adventure Sports	3%	0%	2%
Snow Ski	1%	0%	1%

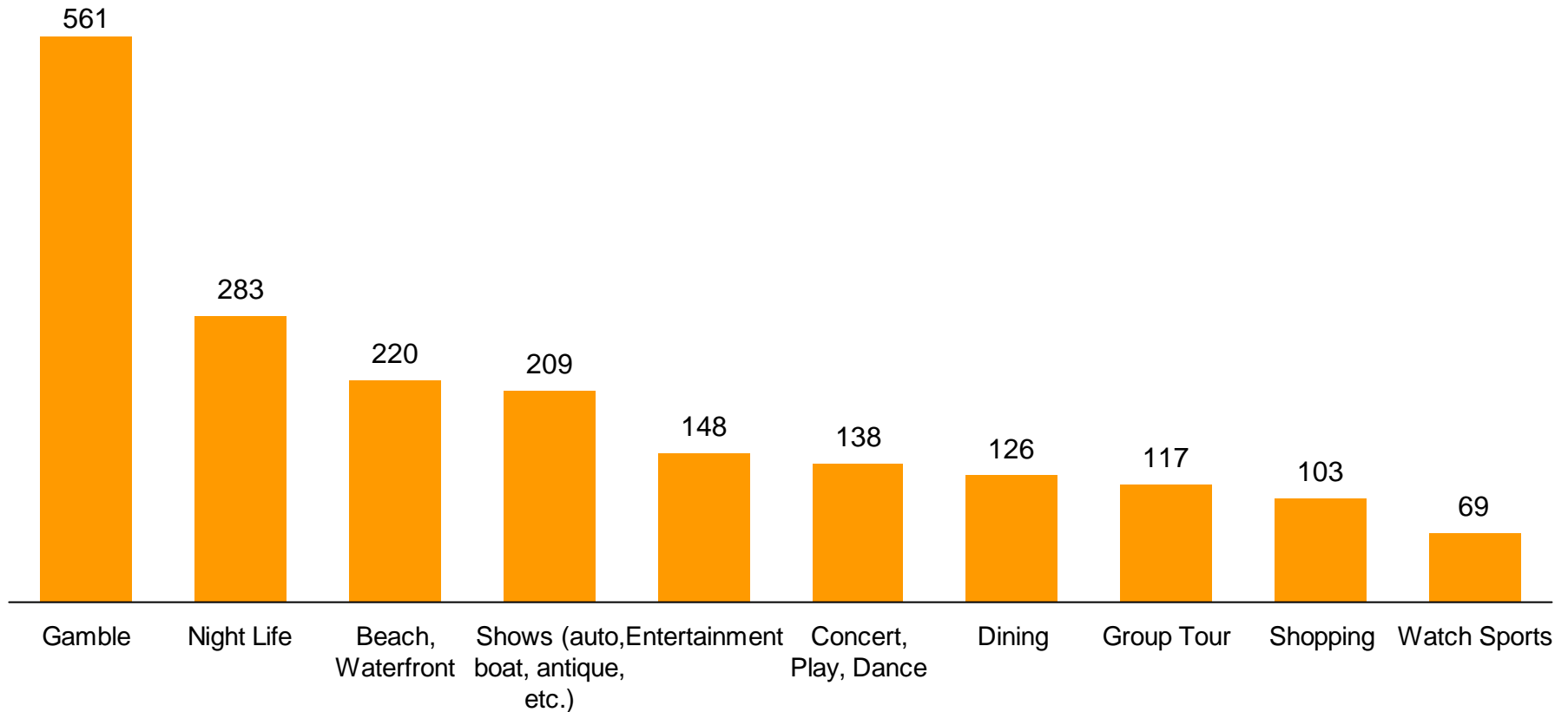


New Jersey Activity Index

(U.S. Participation Level = 100)
(FY2006p /Overnight Leisure Travel Person-Stays)



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 competing destinations.



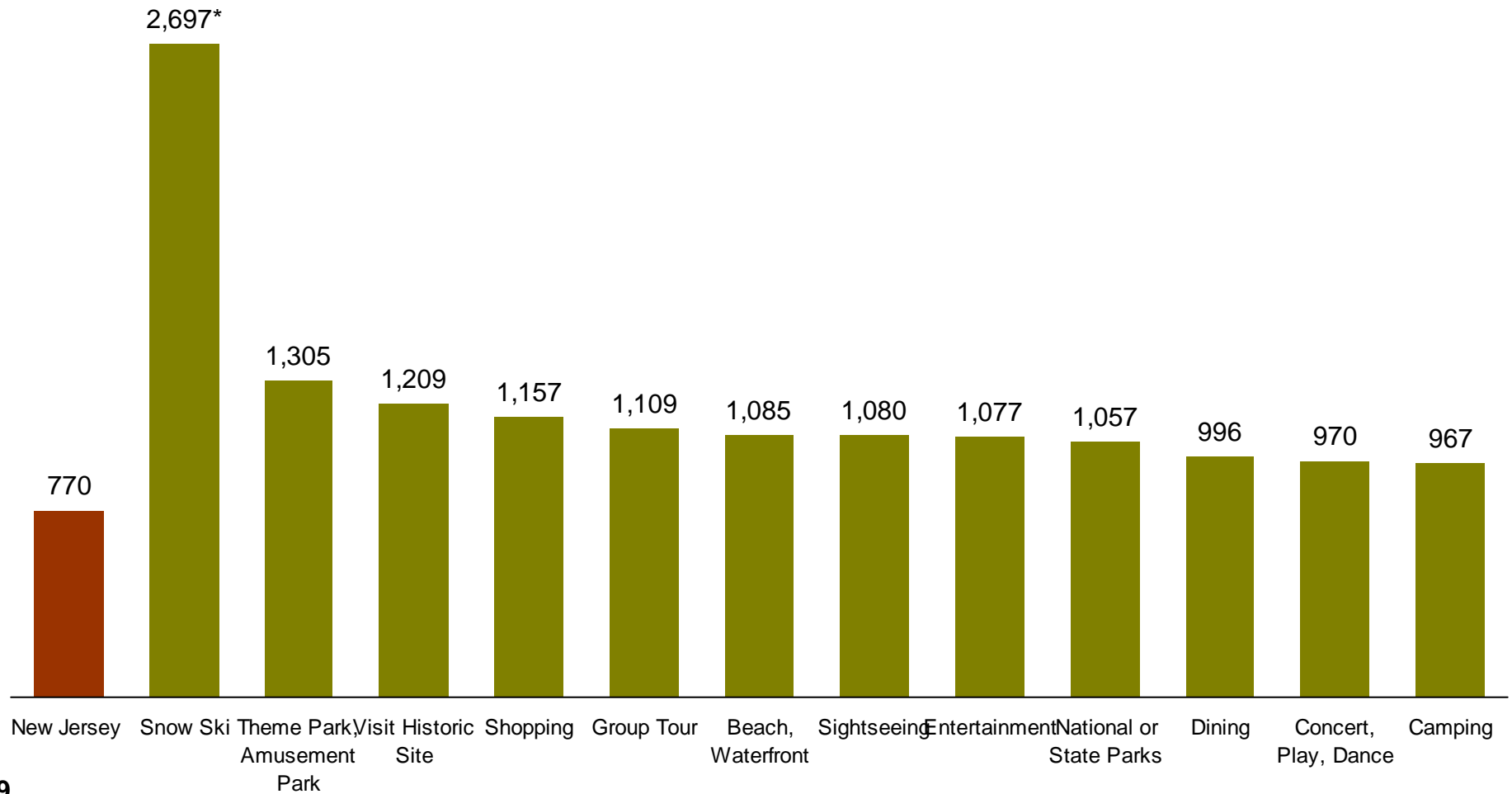


New Jersey Avg. Party per Trip Spending by Activities

(FY2004-FY2006p/\$ Overnight Leisure Travel Stays)



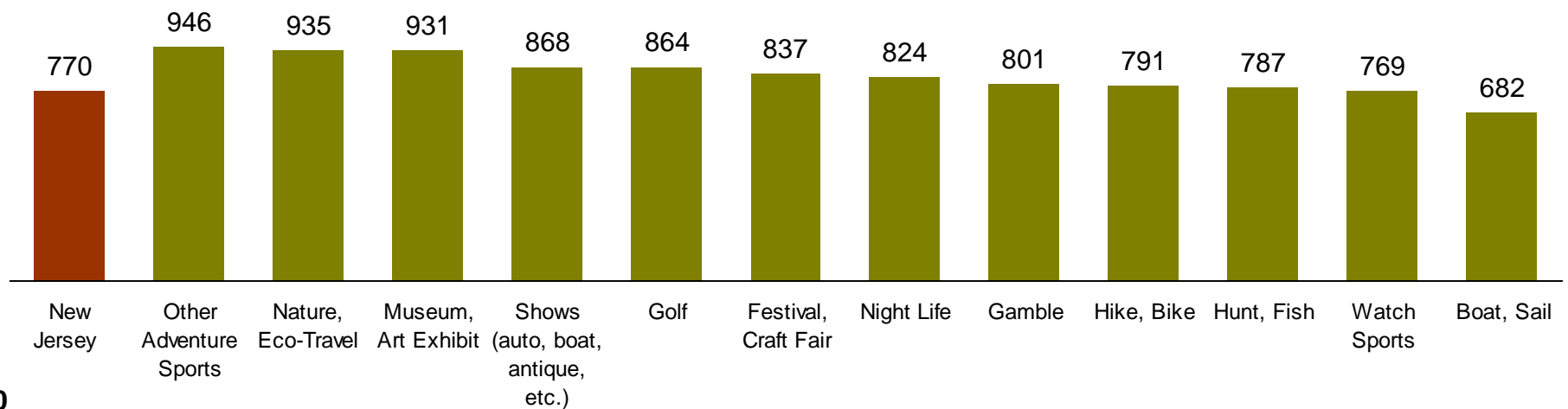
*Note: The number of average party per trip spending for snow/ski should not be used for reporting or decision making due to low sample size issue.





New Jersey Avg. Party per Trip Spending by Activities

(FY2004-FY2006p/\$ Overnight Leisure Travel Stays)

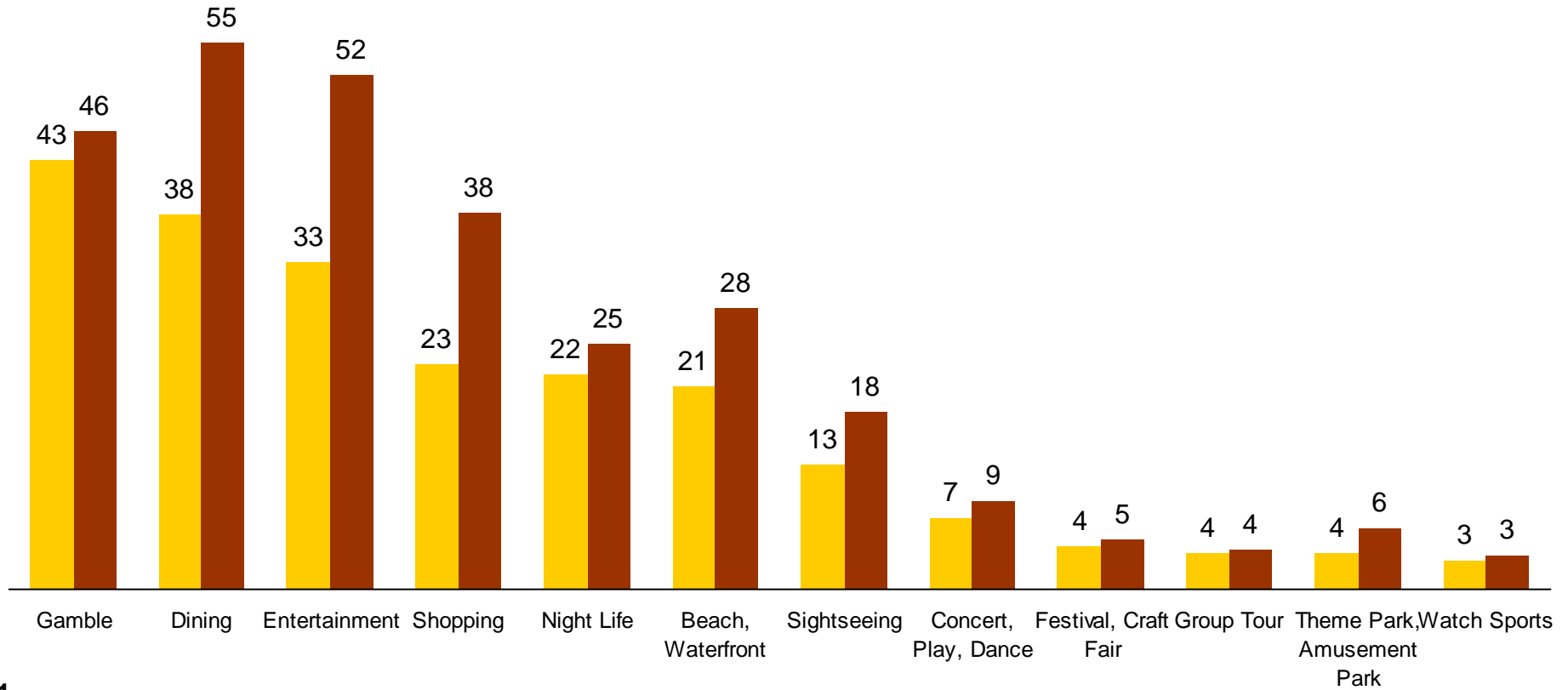


New Jersey Activity Comparison (FY2004-FY2006p/% of Overnight Leisure Travel)



■ Stay Based

■ Trip-Dollar Based



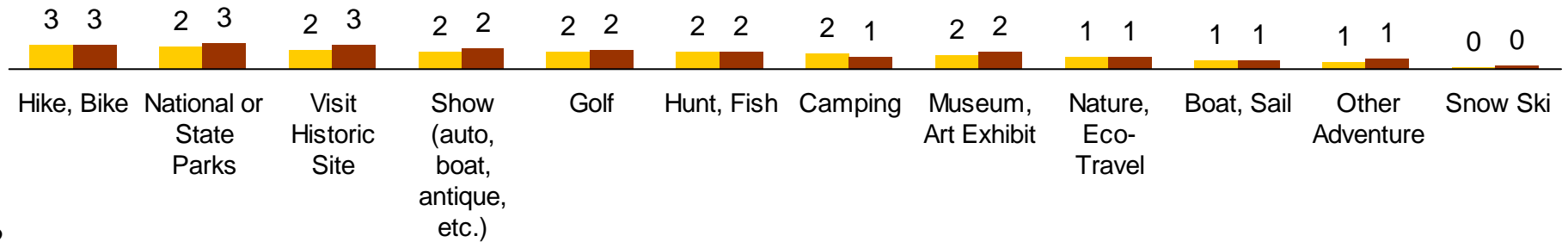


New Jersey Activity Comparison (FY2004-FY2006p/% of Overnight Leisure Travel)

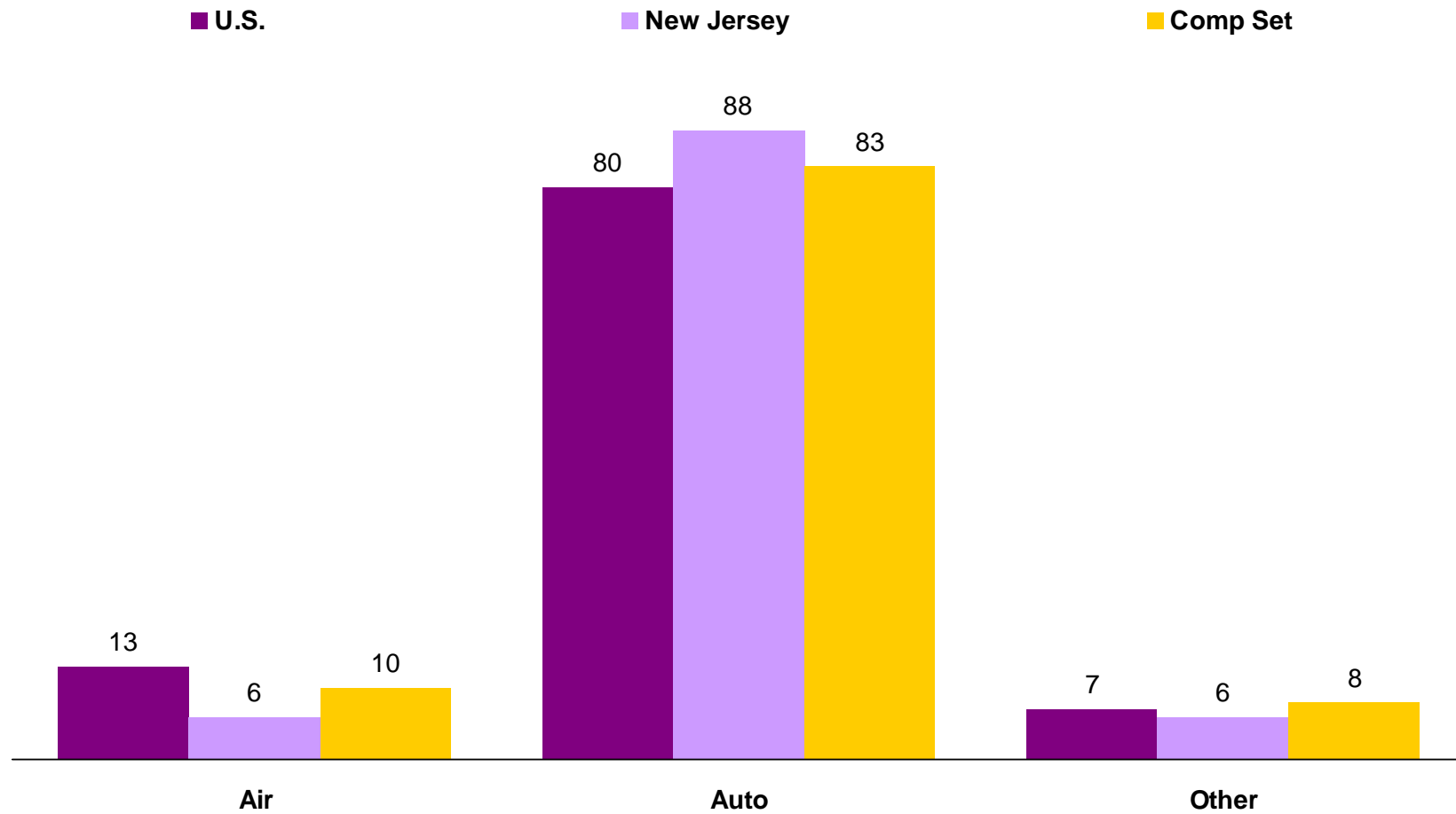


■ Stay Based

■ Trip-Dollar Based

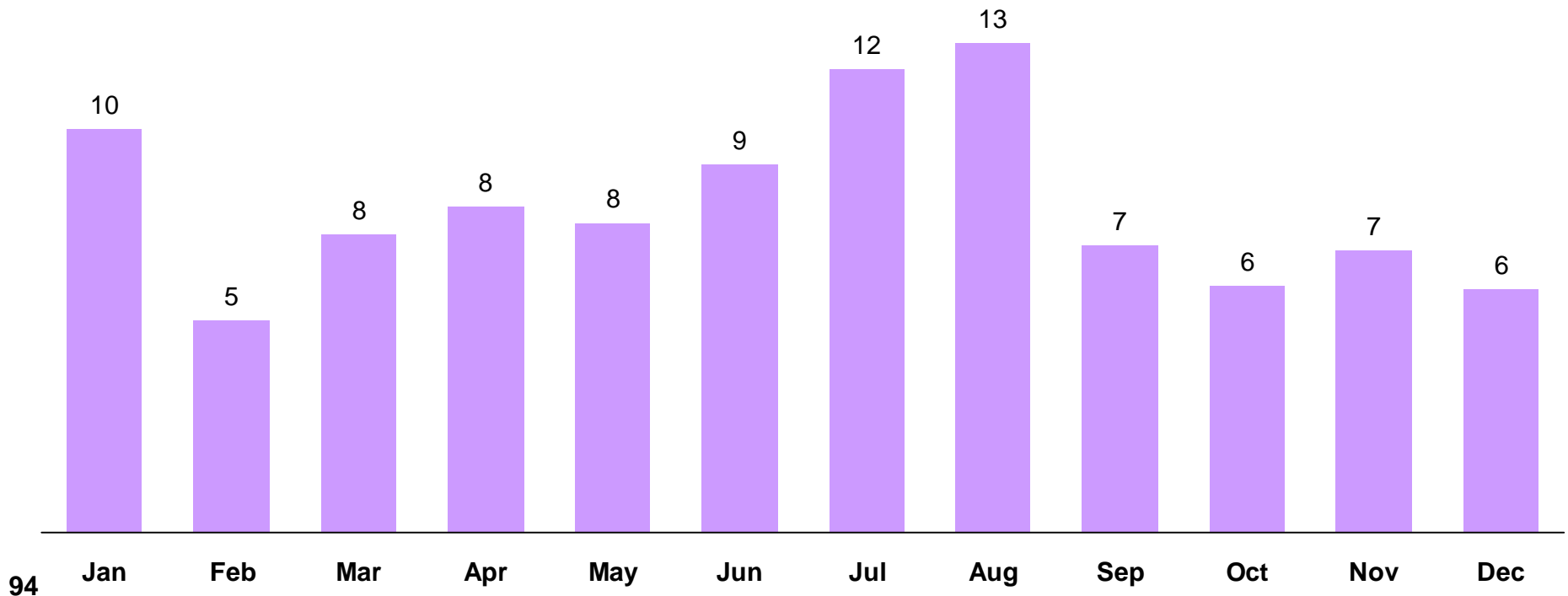


Main Mode of Transportation: U.S., New Jersey and Comp Set (FY2006p /% of Overnight Leisure Travel Person-Stays)





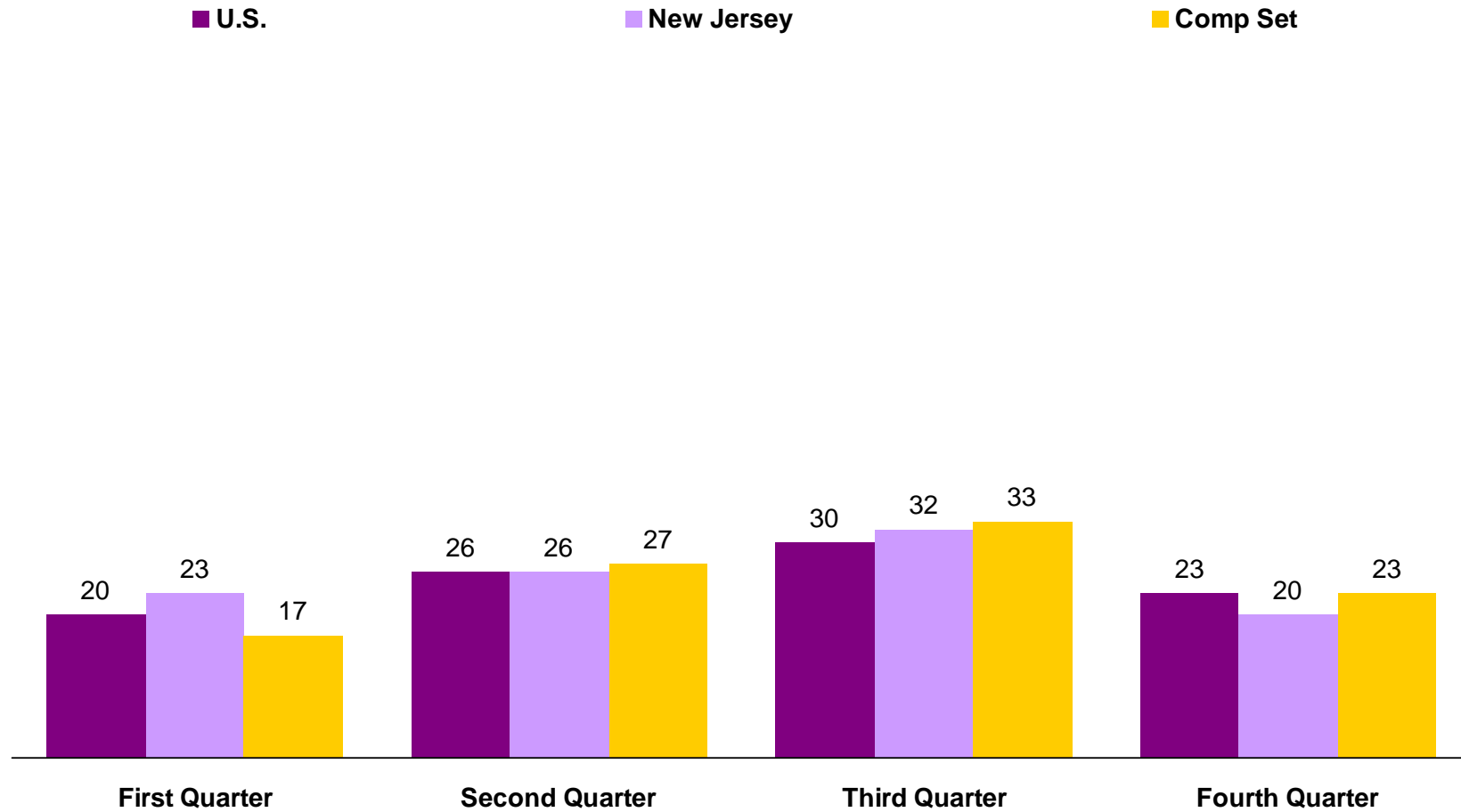
New Jersey Month Trip Started (FY2006p /% of Overnight Leisure Travel Person-Stays)



94



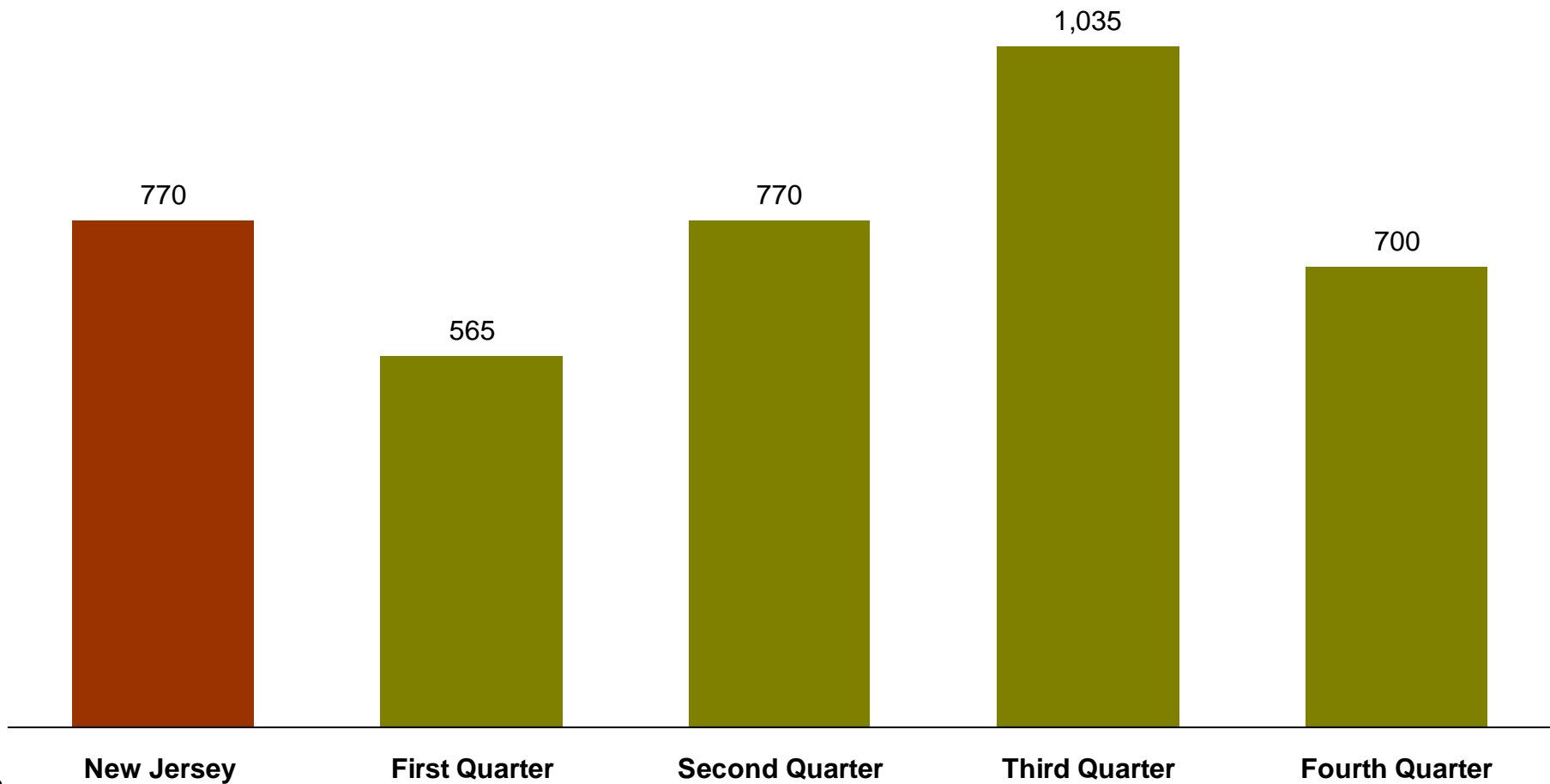
Trip Timing by Quarter: U.S., New Jersey and Comp Set (FY2006p /% of Overnight Leisure Travel Person-Stays)





New Jersey Avg. Party per Trip Spending by Quarter

(FY2004-FY2006p/\$ Overnight Leisure Travel Stays)



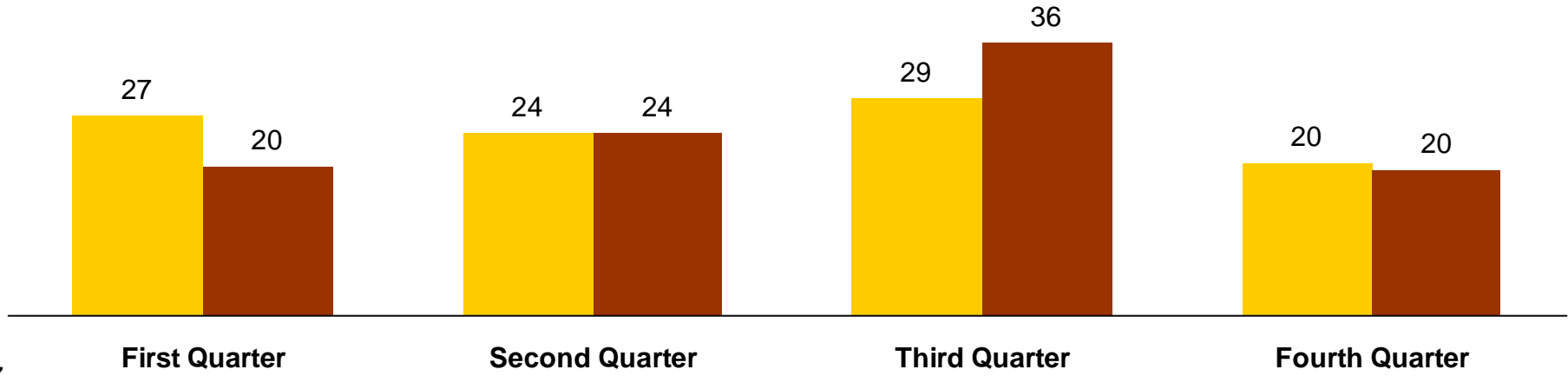


New Jersey Trip Timing Comparison by Quarter (FY2004-FY2006p/% of Overnight Leisure Travel)



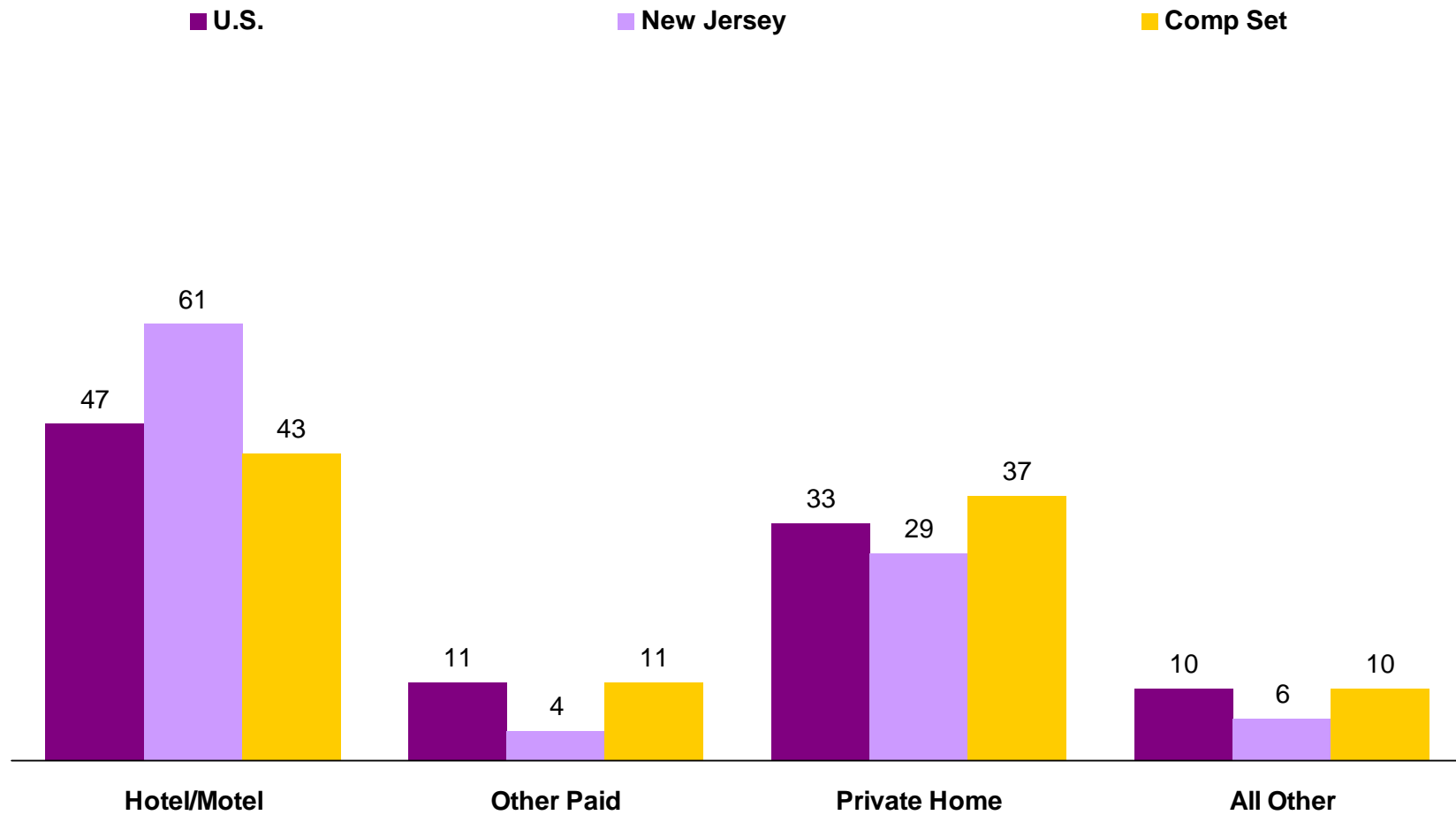
■ Stay Based

■ Trip-Dollars Based



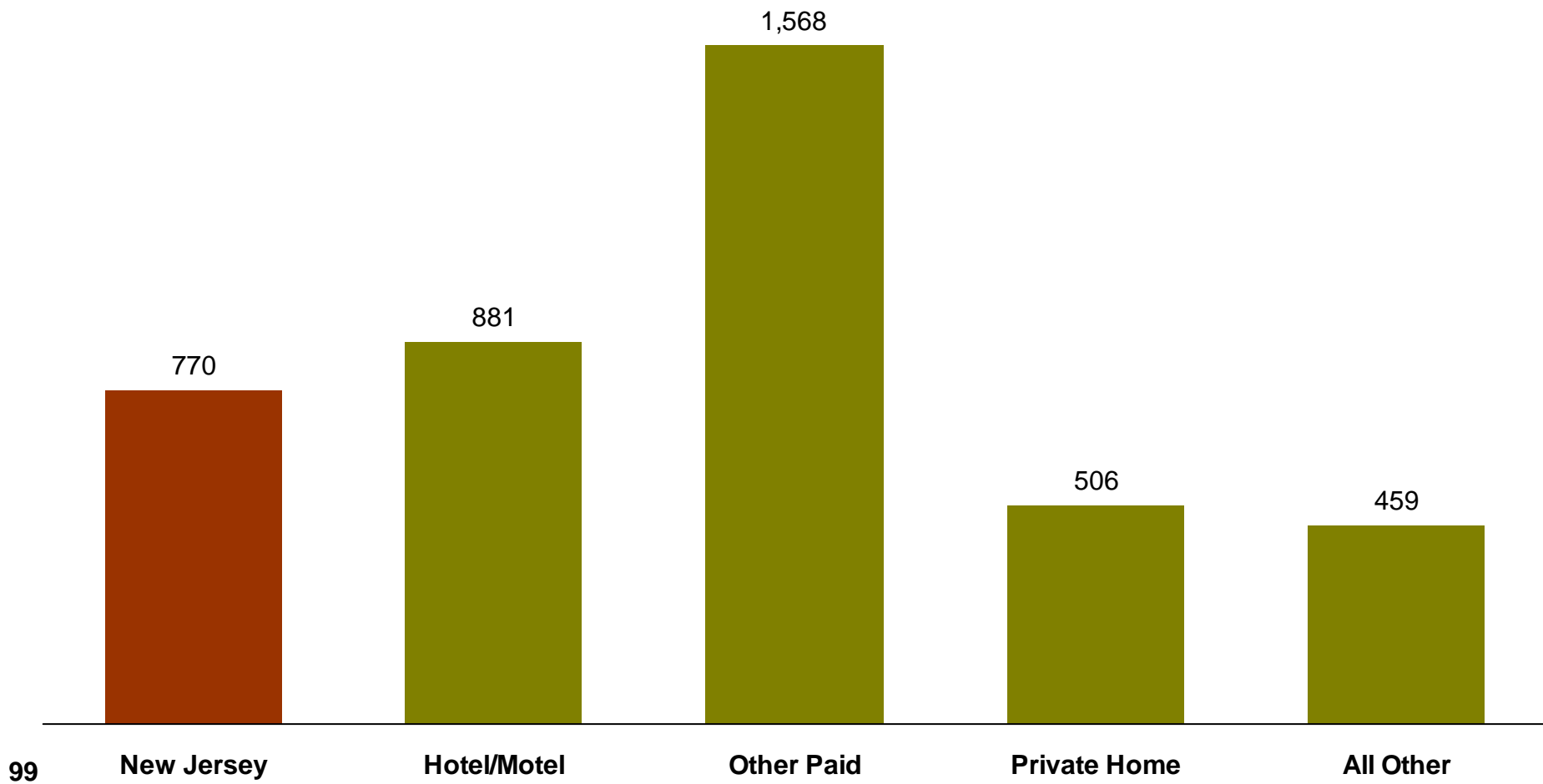


Accommodations Type: U.S., New Jersey and Comp Set (FY2006p /% of Overnight Leisure Travel Person-Stays)





New Jersey Avg. Party per Trip Spending by Accommodations Type (FY2004-FY2006p/\$ Overnight Leisure Travel Stays)



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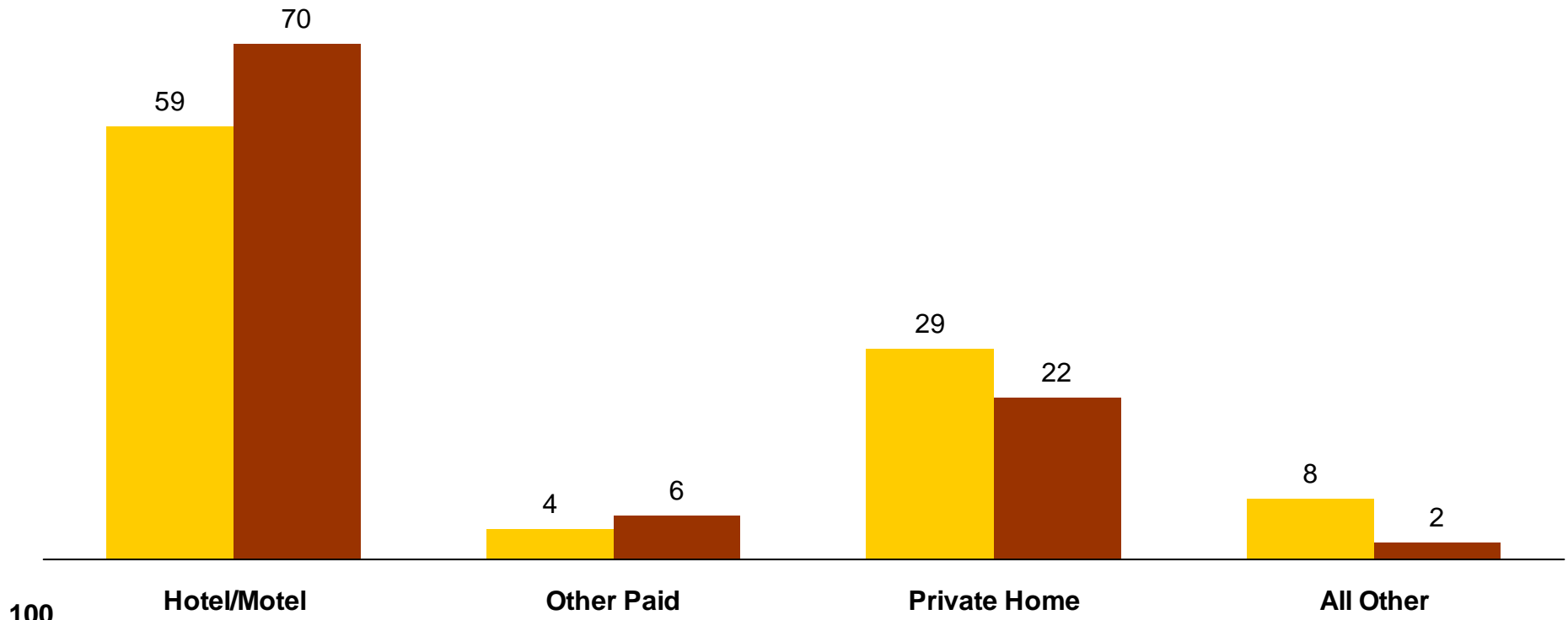


New Jersey Accommodations Type Comparison (FY2004-FY2006p/% of Overnight Leisure Travel)



■ Stay Based

■ Trip-Dollars Based



100



Top Origin Regions

Top Origin States

Top Origin DMAs

Travel Distance by Auto

Travel Distance by Air





- The *Communicating* section will help travel marketers and planners know the key markets that generate the destination's largest share of visitors. This will help destinations launch marketing communications to markets that are likely to convert 'lookers to bookers.' Several origin market geographies are analyzed to give the destination a comprehensive view of where their visitors reside. The following describes these geographies:
 - The U.S. Census Bureau groups U.S. states into nine regions for statistical reporting purposes. These regions are based on purposes established in 1910 and are provided here for comparison to other Census data. This report evaluates the nine Census regions.
 - Defined by Nielsen Media Research, Inc, DMAs or Designated Marketing Areas denote a geographical area consisting of a primary city and surrounding county or counties. The DMAs represent a unified geographic media market. There are 210 DMAs in the U.S. Every U.S. county is in one and Overnight Leisure y one DMA.
 - MSAs reflect the Metropolitan Statistical Area, another concept developed by the U.S. Census Bureau. MSAs reflect groups of counties related to one another socially, geographically, and economically. There are more than 300 MSAs in the U.S. Not every county is in an MSA.
- In addition to knowing from where visitor's originate, the *Communicating* section also provides an analysis of the destination's competition and their respective share of the key origin markets. This analysis will help destination's know where else their visitors travel and, armed with the travel intelligence provided throughout this report, travel marketers can prepare a strategy to lure visitors away from the competition.



Communicating Intelligence Overview

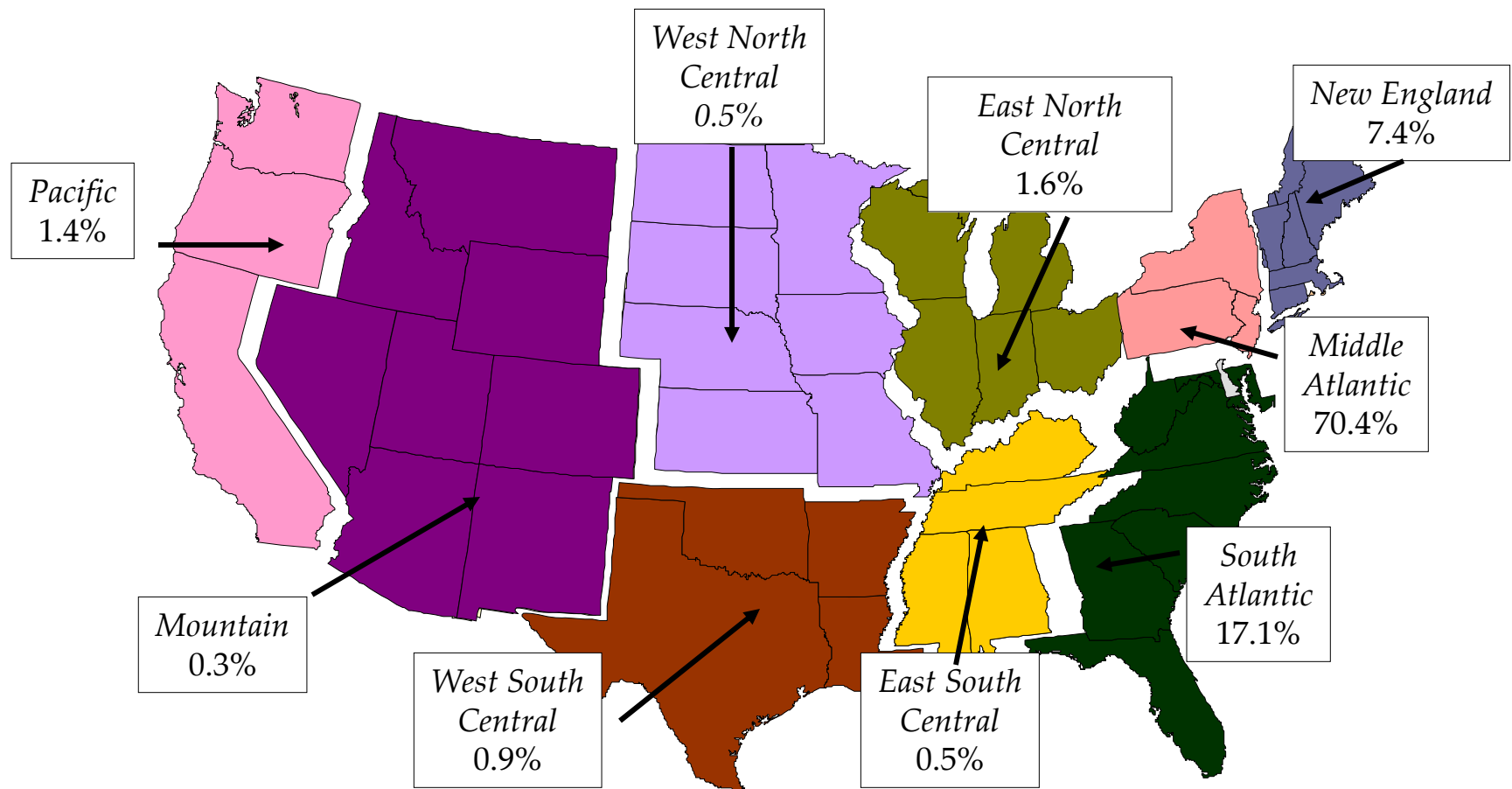


- More than two-thirds of New Jersey Overnight Leisure travelers live in the Middle Atlantic region (70.4%). Visitors live throughout the country, but an additional 17.1% live in the South Atlantic Region.
- More than half of New Jersey's Overnight Leisure travelers originate from New York (25.2%) and the State itself (28%). The top ten states produce 93% of New Jersey's Overnight Leisure travelers.
- Visitor origin DMA data has been combined for three fiscal years – FY2004 through FY2006p to provide better stability of findings. The top two DMAs (New York, NY and Philadelphia, PA) account for nearly two-thirds of New Jersey's Overnight Leisure Person-Stays. The top ten origin DMAs account for more than four-fifths of the FY2006p Overnight Leisure travelers to the State.
- Although not in the top ten origin DMAs, when travel parties from Syracuse, NY, Albany-Schenectady-Troy, NY, and West Palm Beach-Ft. Pierce, FL visit they spend more per party per trip than the New Jersey average. Even though their shares of Trip-Dollars are lower than their corresponding shares of Stays, the New York, NY and Philadelphia, PA DMAs account for the largest shares of both Stays and Trip-Dollars.
- The majority of Overnight Leisure travelers to New Jersey drive less than 200 miles, representing a much greater share of drivers than those traveling to either the average U.S. destination or to the competitive set. More than half of those traveling by air travel more than 1000 miles on average.

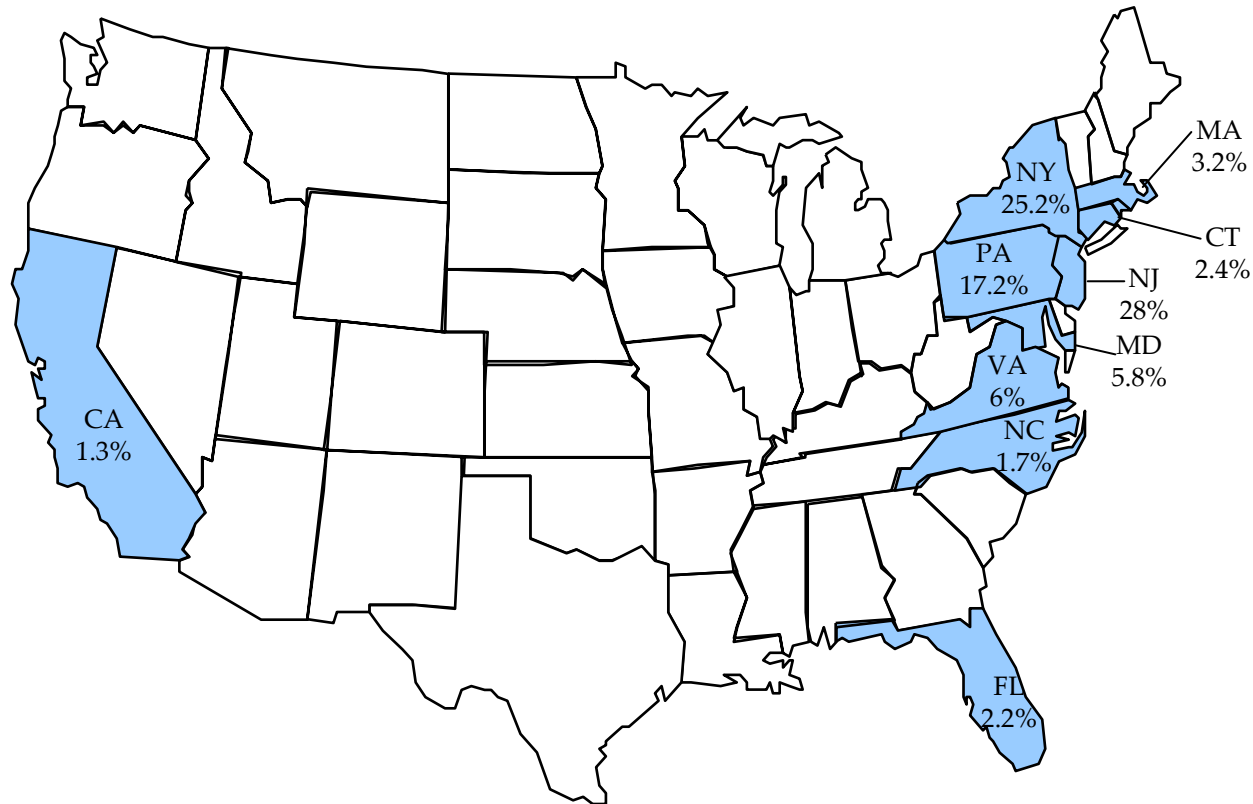
Top Origin Regions for Travel to New Jersey (FY2006p/% of Overnight Leisure Travel Person-Stays)



The U.S. Bureau of Census groups states into nine regions.



New Jersey Top Origin States (FY2006p /% of Overnight Leisure Travel Person-Stays)





New Jersey Top Origin DMAs

(FY2004-FY2006p/% of Overnight Leisure Travel Person-Stays)

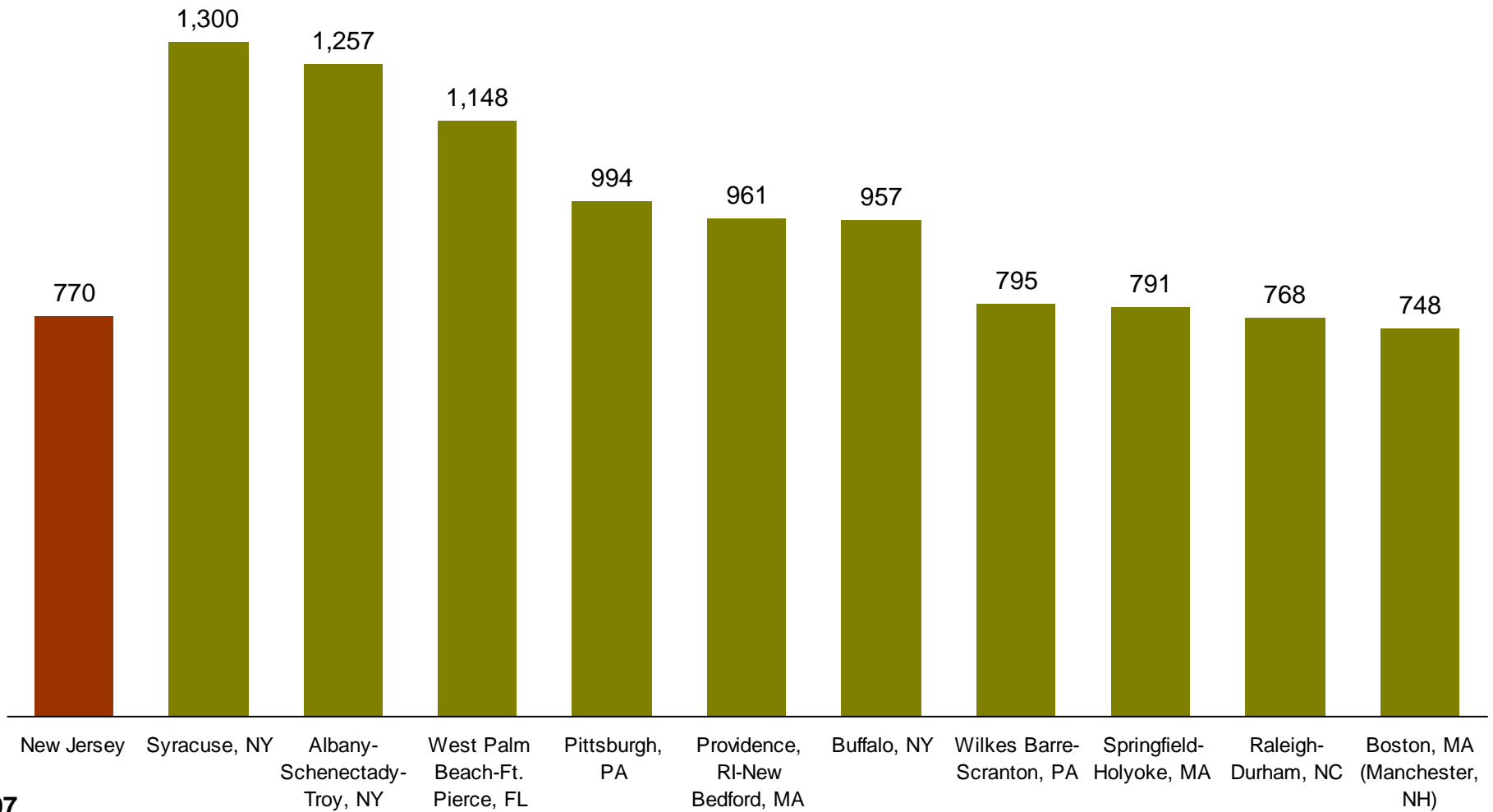


Visitor origin market data has been combined for three years –FY2004 through FY2006p- to provide better stability or reliability of the findings. Markets are sorted in descending order by New Jersey’s top markets.

	U.S.	New Jersey	Comp Set
New York, NY	5.4%	40.8%	13.1%
Philadelphia, PA	2.4%	23.1%	6.7%
Washington, DC (Hagerstown, MD)	2.2%	5.2%	7.6%
Baltimore, MD	1.0%	2.7%	3.6%
Boston, MA (Manchester, NH)	1.8%	2.5%	2.3%
Wilkes Barre-Scranton, PA	0.4%	2.1%	1.3%
Harrisburg-Lancaster-Lebanon-York, PA	0.6%	1.7%	2.4%
Hartford & New Haven, CT	0.9%	1.7%	1.4%
Springfield-Holyoke, MA	0.3%	1.2%	0.3%
Pittsburgh, PA	1.0%	1.2%	3.7%
Top 10 Sum	16.0%	82.2%	42.4%



New Jersey Avg. Party per Trip Spending by Origin DMA (FY2004-FY2006p/\$ Overnight Leisure Travel Stays)



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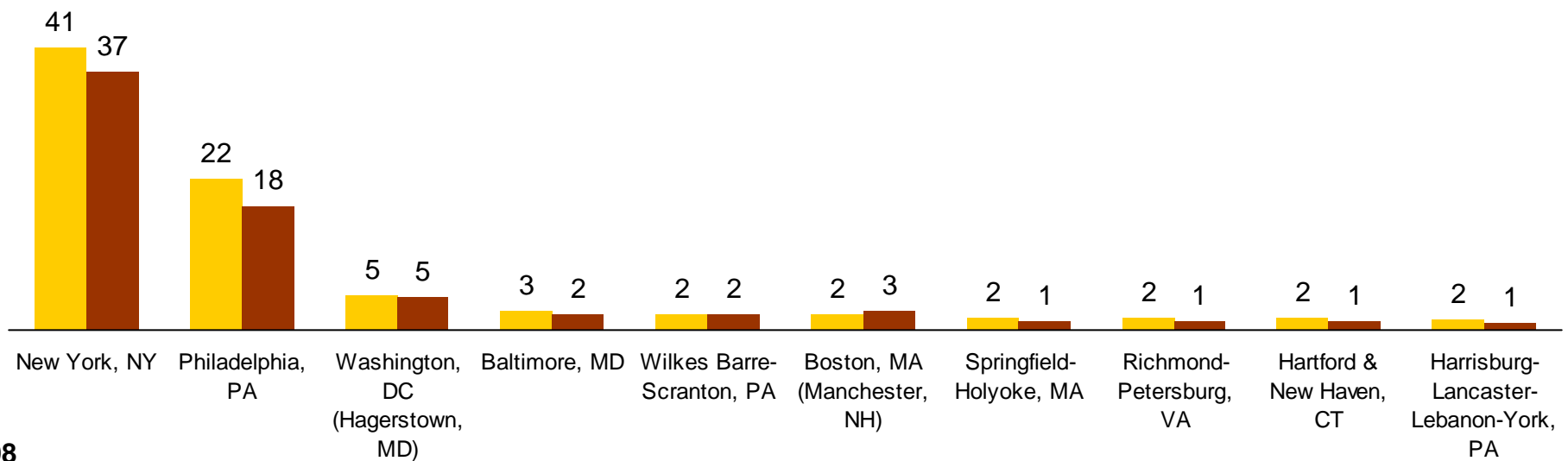


New Jersey Origin DMA Comparison (FY2004-FY2006p/% of Overnight Leisure Travel)



■ Stay Based

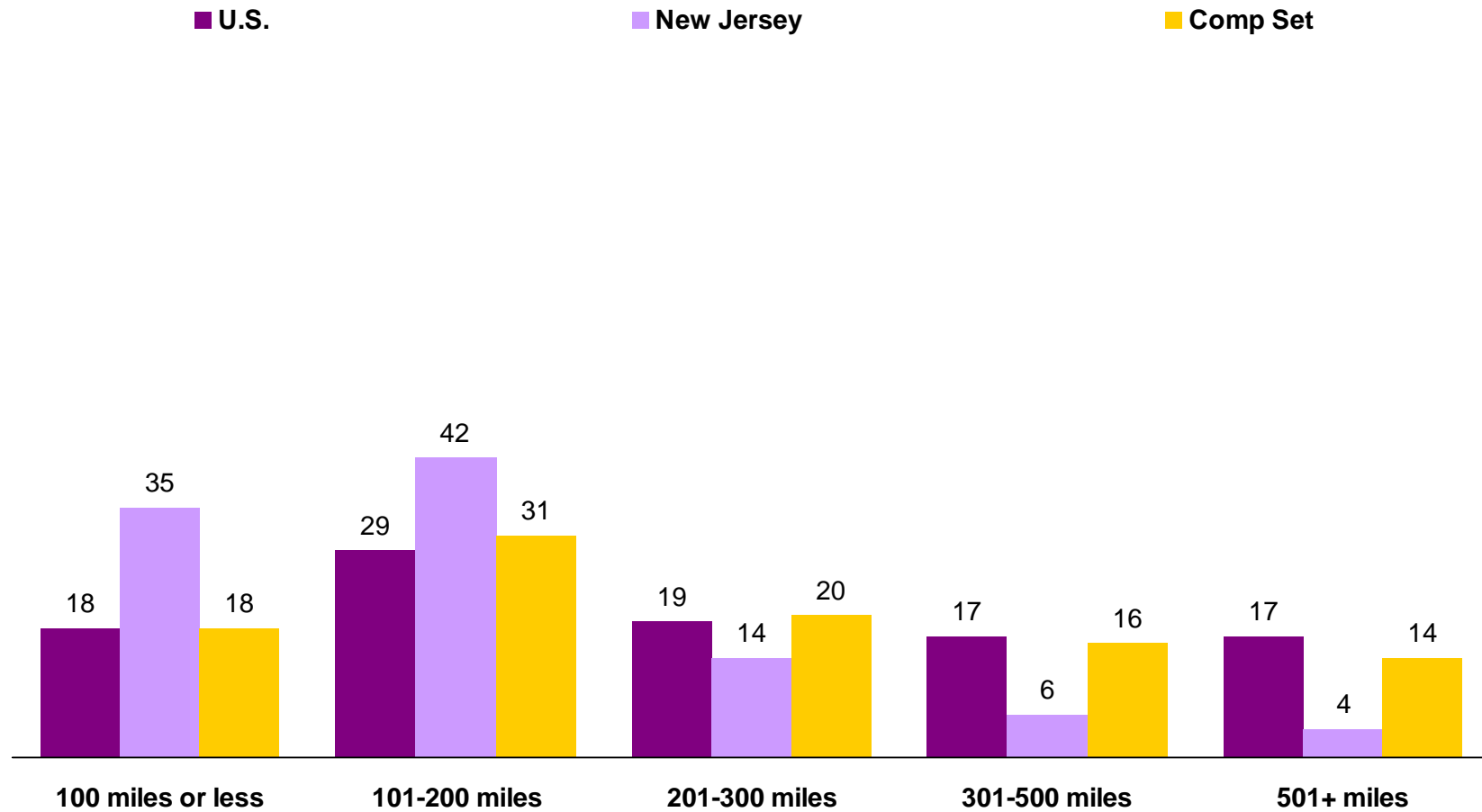
■ Trip-Dollars Based



108



Travel Distance Distribution By Auto: U.S., New Jersey and Comp Set (FY2006p/% of Overnight Leisure Travel Person-Stays)

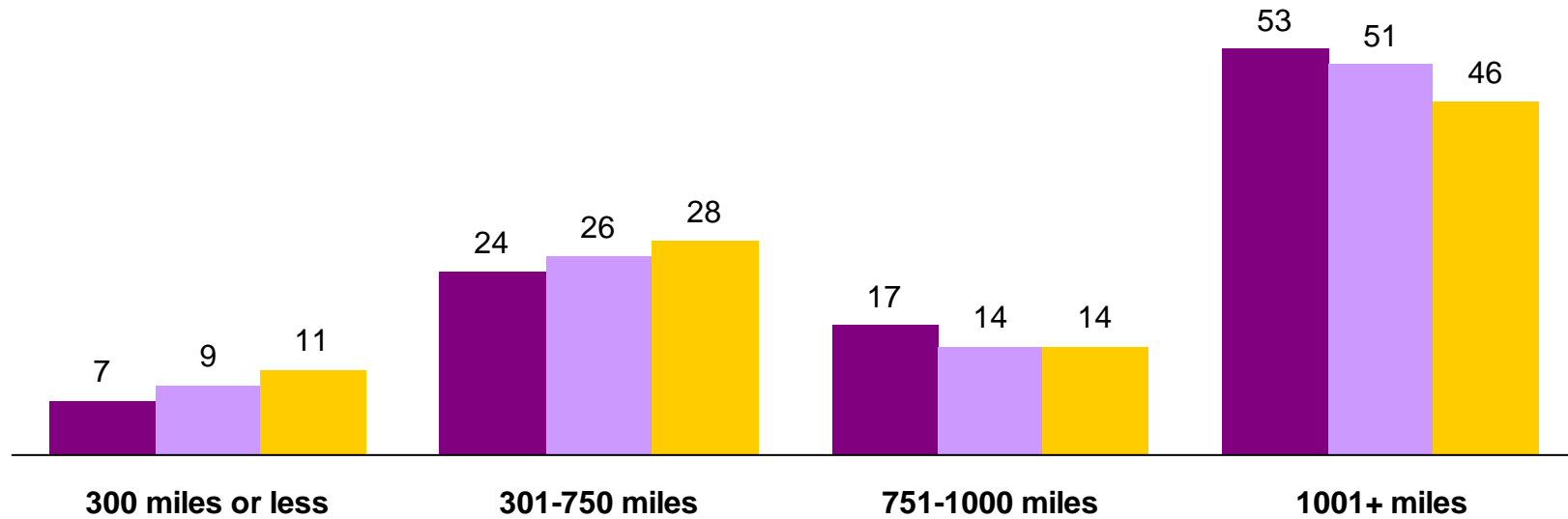




Travel Distance Distribution By Air: U.S., New Jersey and Comp Set (FY2006p /% of Overnight Leisure Travel Person-Stays)



■ U.S. ■ New Jersey ■ Comp Set





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Appendices



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D.K. Shifflet & Associates Ltd.

Excellence in Travel Intelligence[®]

Founded in 1982, DKS&A specializes in syndicated and custom market research in the travel and tourism industry

Syndicated -

- Monitor U.S. Travel behavior: *PERFORMANCE/MonitorSM* - largest, ongoing travel tracking study in industry

Custom -

- Segmentation and positioning studies to assist clients in strategic marketing efforts
- Clients include destinations, theme parks, credit cards, auto clubs, hotels chains among others



Appendix B— PERFORMANCE/MonitorSM Methodology



- All of the information contained in this report is derived from D.K. Shifflet and Associates' **DIRECTIONS**[®] tracking system.
Travel definition: An overnight trip or any day-trip greater than 50 miles one-way from home
- To meet the need for quality information, DKS&A conducts the largest, ongoing, monthly survey of U.S. consumers' travel behavior—the PERFORMANCE/MonitorSM.
 - Each mailing goes to an average of 45,000 households per month.
 - Each survey collects the previous 3 months of travel behavior.
 - DKS&A uses an overlapping monthly mail sequence which reduces sample bias for maximum accuracy.
 - More than 75,000 traveling households respond to the survey each year. This results in more than 154,000 stays at destinations throughout the U.S.
 - New in 2005 - added an average of 9,000 Overnight Leisure in sample mailout per month
- Our methodology provides superior quality control measures:
 - We use the Synovate, Inc (formerly Market Facts, Inc.) household panel—households who have agreed in advance to periodically participate in mail and phone surveys. Extensive information about the household and its members is obtained at the time of household recruitment. Thus, a key advantage of the household panel is knowing to whom surveys are sent and from whom surveys are received. Another key advantage of the panel method is higher response rates to surveys—typically 2 to 3 times higher.
 - The 45,000 average monthly mailings are balanced to the U.S. population across six demographic variables (age, gender, income, education, number of adults, and state of residence). Returned questionnaires are re-balanced to these same variables. This re-balancing ensures findings reflective of the U.S. population and enables findings to be projectable to the entire U.S. population.



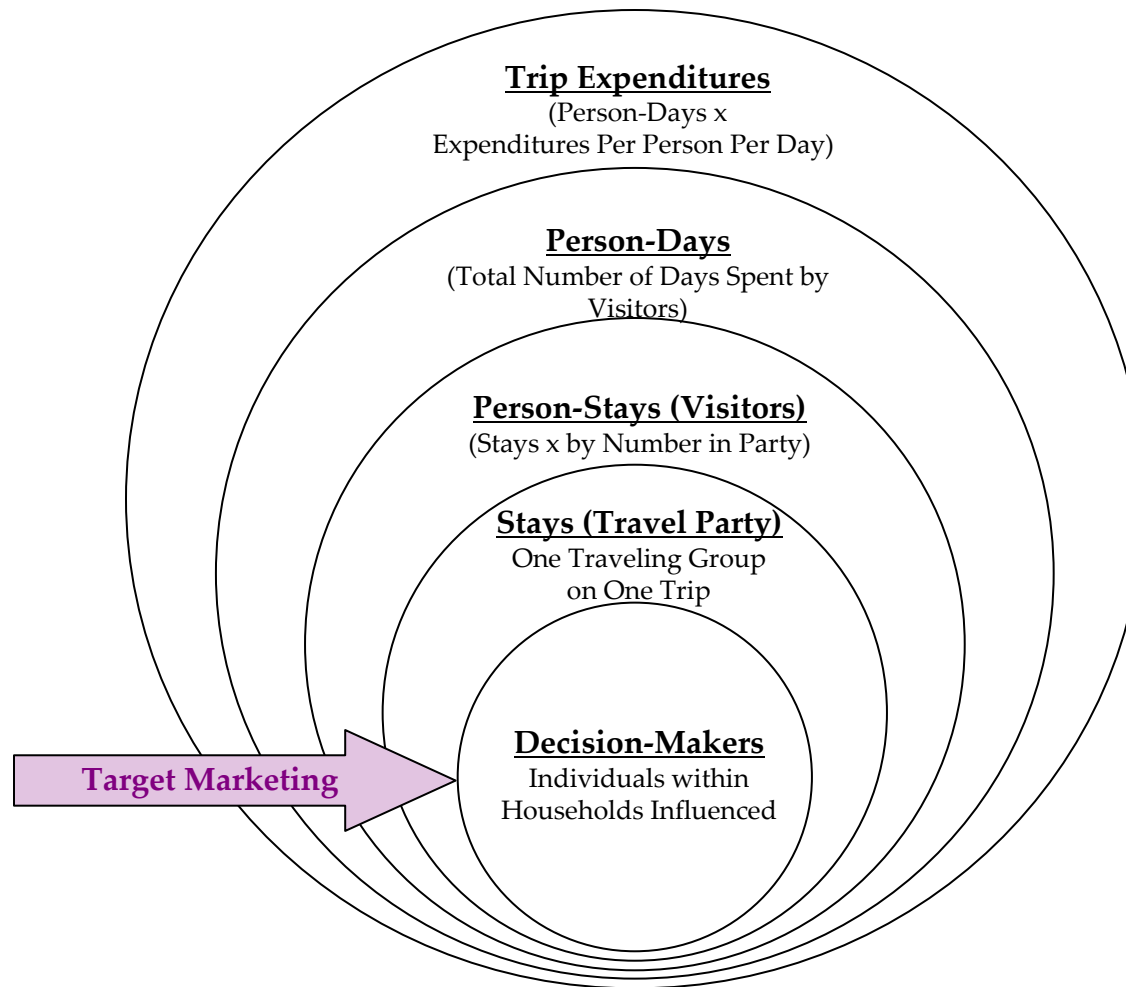
- Returned questionnaires go through an extensive set of manual (visual) and automatic (computer program) processing checks to improve data quality. Questionnaires containing anomalies are discarded or corrected based on insights developed from more than a decade of processing experience.
- All volume estimates in this report are based on a revised visitor volume methodology. The revisions reflect changes in the national-level model and the incorporation of a small-area estimation model. The national-level revisions were necessary following the dramatic changes to travel behavior following September 11, 2001. The small-area estimation component adds enhanced reliability to quarterly and annual estimates by using other data sources (such as hotel room demand and government transportation statistics) as data “anchors” or “reality checks.” Data reported reflect the influence of the revised volume model and the influence of revised population estimates resulting from the 2000 Census.
- Data tables that show all the detailed data collected in this study are delivered to the client. Responses are shown for the total sample as well as key subgroups. The percentages of some questions may exceed 100% due to the rounding of numbers and/or multiple responses permitted for that particular question.



Reporting Levels



- DKS&A can present the results of our **DIRECTIONS® PERFORMANCE/MonitorSM** study of U.S. travelers at many levels. Each level of reporting is used for different purposes.
- The smallest unit is the Decision-Maker, the target of your marketing efforts. The largest measure of visitor volume is *Trip Expenditures* and answers the question “How much did they spend”?
- To answer the question of “How many people came and bought your product (destination)?”, we report the number of people who visited and how long they stayed, i.e. *Person-Days*. *Person-Days* is a cumulative measure of total volume of travel generated by travelers, and is therefore an appropriate measure to use when discussing a destination’s volume and relative market share.
- In contrast, the number of *Person-Stays* taken to a destination tells you how many people came to your destination, but not how long they stayed. For example, this measure tells you how many people traveled for overnight leisure. It does not tell you how long they stayed, just that they were there for leisure.
- People often travel together with family, friends or with other groups. The number of *Stays* tells you how many distinct groups of travelers came to your destination.





Types of Weights



- In most cases, use of weights depends on what you are trying to learn through the data.
- There are not necessarily any “right” or “wrong” weights to use in most cases.
- However, there are some variables that **MUST** use a specific weight.
- A weight makes a particular case, or response, more or less important.
 - Unweighted Data
 - Respondent Weight
 - Travel Weights
 - Stays Weight
 - Person-Stays Weight
 - Person-Days Weight
 - Room Nights Weight
 - Trip-Dollars Weight

General Rules of Thumb when Choosing Weights



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



- Party Composition – Party Composition is best run using the Stays Weight (if you are running it in conjunction with other data run using Person-Stays weight). The reason for this is that party composition already takes into account the “people” on the trip. So, you would not want to weight it using Person-Stays, which also takes into account the number of people, or party size. If you ran party composition weighted by Person-Stays, then larger Stays, such as Families, would get heavier weights and smaller Stays such as Couples or Adults Traveling Alone would get lower weights than they should. In a sense, you would be double-counting.
- Expenditures – Expenditures must ALWAYS be run using Person-Days Weight. The reason for this is due to the way we ask the question in the PERFORMANCE/MonitorSM. We ask respondents to indicate how much they spent per person per day. Thus, the Person-Day Weight must be used.
- Length of Stay – Length of stay should never be run using Person-Days, Person-Stays or Room Nights weights, and should be run using Stays Weight. The reason for this is because this measure already takes into account the number of days a respondent is spending on the stay. So, running length of stay using Person-Days would be double counting – giving higher weights to those who stayed longer (more days). Room Nights also already includes a length of stay concept. In addition, Length of Stay should not be run using the Person-Stays weight. The reason for this is that Length of Stay and Party Size have a strong correlation. The Person-Stays weight contains the element of Party Size. Using the Person-Stays weight for Length of Stay may result in a false understanding of change in Length of Stay.
- Activities – Activities should be run using the Stays Weight or Person-Stays Weight and not the Person-Days Weight. Running activities in Person-Days makes the assumption that each person on the stay participated in each activity for each day. Running activities in Person-Stays makes the assumption that each person on the stay participated in each activity. Running activities using the Stays Weight makes the assumption that at least one person on the stay participated in an activity on at least one day of the stay.



Weights – Cheat Sheet



	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Age	Person-Stays	Person-Days	Room Nights	Trip-Dollars
Income	Person-Stays	Person-Days	Room Nights	Trip-Dollars
Party Composition	Stays	Trip-Days	Room Nights	Trip-Dollars
Occupation	Person-Stays	Person-Days	Room Nights	Trip-Dollars
Education	Person-Stays	Person-Days	Room Nights	Trip-Dollars
Length	Person-Stays	Person-Stays	Stays	Trip-Dollars
Transportation	Person-Stays	Person-Days	Room Nights	Trip-Dollars
Accommodations	Person-Stays	Person-Days	Room Nights	Trip-Dollars
Expenditures	Person-Days	Person-Days	Person-Days	Person-Days
Travel Agent Usage	Person-Stays	Person-Days	Room Nights	Trip-Dollars
Leisure Purpose	Person-Stays	Person-Days	Room Nights	Trip-Dollars
Business Purpose	Person-Stays	Person-Days	Room Nights	Trip-Dollars
Activities	P-Ts or Stays	P-Ts or Stays	Stays	Trip-Dollars
Distance	Person-Stays	Person-Days	Room Nights	Trip-Dollars
Seasons	Person-Stays	Person-Days	Room Nights	Trip-Dollars
Ratings	Person-Stays	Person-Days	Room Nights	Trip-Dollars
Origin Markets	Person-Stays	Person-Days	Room Nights	Trip-Dollars



The confidence interval table indicates how well the data-based on a sample-reflects the entire population of travelers. The smaller the interval, the more accurate the data and the greater confidence we have that the sample number represents the population. For example, if the air travel finding for the U.S. is 10%-using the chart below-we can say that the actual proportion of the population is 10% plus or minus 0.3 percentage point. DKS&A uses a 90% confidence level. Because it reflects a good balance between accepting a difference in findings as real when it in fact is not, and rejecting a difference as not real, when it actually is (in statistical terms, the tradeoff between making a “Type I” and “Type II” error).

		Percentage Finding in Report or Data Tables				
		1.0%	3.5%	7.5%	17.5%	50%
Sample Size for FY2006p		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%	25% to 75%
U.S. ONL	38,203	0.1%	0.2%	0.2%	0.3%	0.4%
New Jersey ONL	1,305	0.5%	0.8%	1.2%	1.7%	2.3%
Comp Set ONL	7,118	0.2%	0.4%	0.5%	0.7%	1.0%

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



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.

For example, if the air travel finding for U.S. in are 17% in pervious time period, 15% in current time period. Using the chart below-we can say that the actual proportion change is not statistically significant since the resulting Z score (1.52) is smaller than the table Z score (1.64).

Data Input	Sample 1	Sample 2	Resulting Z Score	Z score	Confidence Level
Proportion	17.0%	15.0%		1.96	95%
Sample Size (n)	1600	1500	1.52	1.64	90%



D.K. SHIFFLET & ASSOCIATES, LTD
DIRECTIONS® PERFORMANCE/MONITORSM
SURVEY QUESTIONS (3-17-05)

Sample Contacted Annually: 540,000 Households
45,000 Per Month - Every Month - Year After Year

[unless otherwise identified, each measure generally available by month back to 1992]

1. Age of Respondent [Open End/Actual]
Gender of Respondent Male Female

2. List your frequent traveler programs and travel club memberships (name of airlines, hotels, rental cars, auto club: AAA, etc; AARP). (List up to 6) [Open End/Coded]

3. **Last 12 months**, number of nights you stayed in paid lodging (e.g. hotel, condo, ship, campground) for:
 - Business: Number of Nights [Open End/Actual]
 - Leisure: Number of Nights [Open End/Actual]
 - Theme Parks: Number of Times [Open End/Actual] *Added 06/96*

4. **Past 3 months** travel, both business and leisure, how many did you take of:
 - 4a. Overnight Trips: A night away from home, local or distant.
Overnight Trips: Number of Times [Open End/Actual] (*"0" if none*)
 - 4b. Day Trips: out of your local area (50+ miles one way).
Day Trips: Number of Times [Open End/Actual] (*"0" if none*)

If "0" to both questions 4a and 4b, stop here. Otherwise continue with question 5.



Questionnaire (con't)



5. Answer for all day and overnight trip(s) in the past 3 months. (up to 9 trips)

5a. **TRIP**

Trip Start: Month and Date [Open End/Actual]
 Trip Length: Number of Nights [Open End/Actual] ("0" if day trip)
 Was the trip a group tour? [Y/N]

5b. **Stays COMPOSITION**

Number of Men [Open End/Actual]
 Number of Women [Open End/Actual]
 Number of Kids Age 0-17 [Open End/Actual]
 Number from your Household [Open End/Actual]

5c. **TRANSPORTATION**

Main Mode of Transportation:

1 Airline	6 Van/ SUV/ Small Truck
2 Amtrak	7 Large Truck
3 Car	8 Ship
4 Bus	9 Other
5 Camper/ RV	

Payment Method:

1 Cash/ Check	6 Diners' Club
2 American Express	7 Other Card
3 MasterCard	8 Company Direct Bill
4 Visa	9 Points/ Miles
5 Discover	10 Other/ Free

Reservation Type:

1 No Reservation	5 Airline Co. Website <i>Added 11/02</i>
2 800 Phone #	6 Other Website <i>Added 11/02</i>
3 Corp. Travel Dept.	7 Other
4 Travel Agent	

AIRLINE

If used, name main airline: [Open End/Coded]
 Satisfaction Rating: 1-10 Scale (1=Poor, up to 10=Excellent)
 Value Rating: 1-10 Scale (1= Poor, up to 10 = Excellent)



RENTAL CAR

If rented a Car/Truck, name the company

[Open End/Actual]
 (1=Poor, up to 10=Excellent)

Satisfaction Rating: 1-10 Scale

Value Rating: 1-10 Scale

(1=Poor, up to 10=Excellent)

Car Rental Payment Method:

- | | | | |
|---|------------------|----|---------------------|
| 1 | Cash/Check | 6 | Diners' Club |
| 2 | American Express | 7 | Other Card |
| 3 | MasterCard | 8 | Company Direct Bill |
| 4 | Visa | 9 | Points/ Miles |
| 5 | Discover | 10 | Other/ Free |

5d. **EXPENDITURES BY CATEGORY** ("0" if none for **You Overnight Leisure y**)

Trip Package \$ (Fly/Hotel, Cruise, Group Tour, etc.) [Open End/Actual]

NOT IN PACKAGE

- | | | |
|--|-------------------|--------------------|
| Main Transportation \$ | [Open End/Actual] | <i>Added 07/96</i> |
| Rental Car \$ | [Open End/Actual] | <i>Added 07/96</i> |
| Food/Drink \$ | [Open End/Actual] | |
| Entertainment/Recreation \$ | [Open End/Actual] | |
| <u>All Shopping</u> \$ | [Open End/Actual] | |
| All other <u>except</u> Accommodations | [Open End/Actual] | |

6. For all day and overnight trip(s) in the past 3 months, list each city visited.

6a. **WHERE and WHEN**

City (e.g. Miami): (If out of U.S., write city and country) [Open End/Coded]

State (e.g. FL): [Open End/Coded]

CITY RATINGS

Overall Destination Rating: 1-10 Scale (1=Poor, up to 10=Excellent)

Destination Value Rating: 1-10 Scale (1=Poor, up to 10=Excellent)

Number of visits in the last 3 years: [Open End/Actual] *Added 05/96, Changed 03/01*

TRIP TIMING

Trip Start: Month and Day [Open End/Actual]

Trip Length: Number of Nights [Open End/Actual] ("0" if day trip)



6b. **PURPOSE OF STAY**

	<i>Company Business</i>	<i>Leisure/Personal</i>	
"Group Meeting"	{ 1 Convention 2 Training/ Seminar 3 Other Group Meeting 4 Client Service, Consulting 5 Inspection, Audit 6 Construction, Repair 7 Sales, Purchasing 8 Government/ Military 9 Other Company Business	10 Getaway Weekend	} "Leisure Vacation"
		11 General Vacation	
		12 Visit Friend/ Relatives	} "Leisure Non-Vacation"
		13 Special Event	
"Transient Business" <i>Changed 03/01</i>		14 Other Personal	
Both Leisure and Business?	[Y/N] <i>Added 03/01</i>		

ACTIVITIES

List primary activities for each visit (list up to 4) and circle activity if it was main reason for the trip:

- | | |
|---|---|
| 1 Eco-Travel <i>Added 03/01</i> | 11 Hunt, Fish, etc. |
| 2 Parks: National, State, etc. | 12 Snow Ski, Snow Board |
| 3 Visit Historic Sites | 13 Other Adventure Sports |
| 4 Museum, Art Exhibit, etc. <i>Added 03/01</i> | 14 Play Golf |
| 5 Concert, Play, Dance, etc. <i>Added 03/01</i> | 15 Beach/ Waterfront |
| 6 Festival, Craft Fair, etc. | 16 Boat/ Sail |
| 7 Night Life | 17 Show: Boat, Car, Home, etc. |
| 8 Gamble | 18 Theme/ Amusement Park |
| 9 Watch Sports Event | 19 Touring/ Sightseeing |
| 10 Hike, Bike, etc. | 20 Look at Real Estate <i>Added 06/03</i> |

6c. **OVERNIGHT ACCOMMODATION**

ACCOMMODATION STAYED

Name of Hotel/ Motel, Shipline, etc. (use chain/ hotel, and extension names, e.g. Seasons Inn Express). [Open End/Coded] *If friend/ relatives' home, use "Friend"*

ACCOMMODATION RATINGS

Overall Satisfaction: 1-10 Scale (1=Poor, up to 10=Excellent)
 Value Rating: 1-10 Scale (1=Poor, up to 10=Excellent)
 Service Rating: 1-10 Scale (1=Poor, up to 10=Excellent)



Questionnaire (con't)



How many stayed in your room: Suite Room?	[Open End/Actual] [Y/N]	
Location of Accommodation:	1 Airport 2 Downtown 3 Suburban 4 Highway	5 Small Town 6 Government Park 7 Ship 8 Other
Type of Accommodation:	1 "All Suite" Hotel 2 Resort Hotel 3 Hotel/ Motel 4 Timeshare 5 Bed & Breakfast 6 Camping/ RV	7 Ship/ Cruise 8 My 2nd home/ apt/ condo 9 Home/ apt/ condo (not mine) 10 Corporate Apartment <i>Added 07/04</i> 11 Other
Reservations for Accommodations:	1 No Reservation 2 Chain 800 phone # 3 Direct to location 4 Corp. Travel Dept.	5 Travel Agent 6 Hotel Chain Website <i>Added 11/02</i> 7 Other Website <i>Added 11/02</i> 8 Other
How Paid for Accommodations:	1 Self/Friend/Relative 2 Expense Account 3 Company Direct Bill	4 Per Diem 5 Free
Payment for Accommodations:	1 Cash/ Check 2 American Express 3 MasterCard 4 Visa 5 Discover	6 Diner's Club 7 Other Card 8 Company Direct Bill 9 Points/ Miles 10 Other/ Free
ACCOMMODATION EXPENDITURE		
Dollars Per Night (Room Overnight Leisure y)	[Open End/Actual]	
Total Hotel/ Lodging Bill	[Open End/Actual]	
Special Deal?	[Y/N]	
If in area again, will stay here?	[Y/N] <i>Added 11/03</i>	

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Questionnaire (con't)



DEMOGRAPHICS

Number of Persons in Household:

[Actual]

Annual Household Income:

1	Less than \$5,000	15	\$40,000-\$44,499
2	\$5,000-\$7,500	16	\$45,000-\$49,999
3	\$7,500-\$9,999	17	\$50,000-\$59,999
4	\$10,000-\$12,499	18	\$60,000-\$74,999
5	\$12,500-\$14,999	19	\$75,000-\$84,999
6	\$15,000-\$17,499	20	\$85,000-\$99,999
7	\$17,500-\$19,999	21	\$100,000-\$124,999
8	\$20,000-\$22,499	22	\$125,000-\$149,999
9	\$22,500-\$24,999	23	\$150,000-\$174,999
10	\$25,000-\$27,499	24	\$175,000-\$199,999
11	\$27,500-\$29,999	25	\$200,000-\$249,999
12	\$30,000-\$32,499	26	\$250,000-\$299,999
13	\$32,500-\$34,999	27	\$300,000
14	\$35,000-\$39,999		

Occupation of Adult Heads of Household:

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

Education of Adult Heads of Household: *Changed 10/02*

1	Attended Grade School	5	Attended College
2	Graduated Grade School	6	Graduated College
3	Attended High School	7	College Post Graduate
4	Graduated High School		

Marital Status of Head of Household:

1	Married	2	Never Married	3	Divorced/ Widowed/ Separated
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Children in Household (Age and Gender):

[Actual]

Location of Household:

State, DMA, ZIP Code, MSA, County

PRIZM coded respondents to block level address
 All can be linked to Claritas PRIZM/Clusters and other databases
Available to clients as special purchase.