



LLOYD D. LEVENSON INSTITUTE  
OF GAMING, HOSPITALITY & TOURISM  
THE RICHARD STOCKTON COLLEGE OF NEW JERSEY



**2013 Tourism Promotion Survey**  
*New Jersey Visitor Profile Study*



## 2013 TOURISM PROMOTION SURVEY: NEW JERSEY VISITOR PROFILE STUDY

The 2013 New Jersey Visitor Profile Study was conducted by Stockton College's Lloyd D. Levenson Institute of Gaming, Hospitality and Tourism (LIGHT). It was based on a survey that included more than 1,300 responses, primarily in the 8 major Northeast United States markets within and around New Jersey. This year we focused the study on determining the visitors' profile, including describing that visitor's trip of an hour from home to visit a tourist attraction in New Jersey during 2012. We asked respondents to describe that trip, in particular where they had visited. The information allows us to describe the average profile of a visitor to the state of New Jersey and provide some regional visitor profiles as well. We begin by first describing recent performance for New Jersey's lodging industry. Details on all six New Jersey tourism regions' lodging industry performance are provided later in the report.

### **The research team included:**

#### **Dr. Brian J. Tyrrell:**

*Lead Researcher and Senior Research Fellow with the Levenson Institute of Gaming, Hospitality and Tourism, Associate Professor of Hospitality and Tourism Management Studies in the School of Business, The Richard Stockton College of New Jersey*  
**[www.stockton.edu/busn](http://www.stockton.edu/busn)** (609.652.4759)

#### **Dr. Israel Posner:**

*Executive Director, Lloyd D. Levenson Institute of Gaming, Hospitality and Tourism at The Richard Stockton College of New Jersey*  
**[www.stockton.edu/levenson](http://www.stockton.edu/levenson)** (609.347.2168)

## THE LLOYD D. LEVENSON INSTITUTE OF GAMING, HOSPITALITY AND TOURISM

in the School of Business at the Richard Stockton College of New Jersey, leverages Stockton's intellectual resources and community connections to provide research and outreach that supports gaming and tourism leaders and policy makers in the Atlantic City region, in the State of New Jersey and beyond.

*Cover photo courtesy of Giulia Iannitelli. 2012 Hot Air Balloon Festival, Warren County Farmers' Fair.*

## Table of Contents

<b>Lodging Demand in New Jersey: Record Year in 2012</b> .....	4
Figure 1: State of New Jersey Hotel Motel Occupancy Fee .....	4
<b>Hurricane Sandy and: 4th Quarter Lodging Demand</b> .....	5
Figure 2: NJ Hotel Motel Occupancy Fee, 4th Fourth Quarter 20121 .....	5
<b>2013 Tourism Promotion Survey – NJ Visitor Profile Study: Where the Visitors are going in New Jersey</b> .....	6
Figure 3: New Jersey Destinations Visited by NJ’s Six Tourism Regions .....	6
<b>New Jersey’s Visitor Profile: Where the Visitors are Coming From</b> .....	7
Figure 4: Percent of Respondents Visiting New Jersey in 2012 by Designated Market Area (DMA).....	7
<b>New Jersey’s Visitor Profile: Why the Visitors Came – Primary Trip Purpose</b> .....	8
Figure 5: Primary Trip Purpose .....	8
<b>New Jersey’s Visitor Profile: Minors in Travel Party by Primary Trip Purpose</b> .....	8
Figure 6: Minors in Travel Party by Primary Trip Purpose.....	8
<b>New Jersey’s Visitor Profile: Visitor Spending and Average Length of Stay in NJ by Trip Purpose</b> .....	9
Figure 7: Spending on Food & Drink, Shopping and Entertainment by Trip Purpose.....	9
Figure 8: Average Length of Stay (Nights) by Trip Purpose .....	9
<b>The Greater Atlantic City Region’s Average Spend by Trip Purpose: Atlantic County</b> .....	10
Figure 9: Spending on Food & Drink, Shopping and Entertainment in Atlantic County by Trip Purpose .....	10
Figure 10: The Greater Atlantic City Region’s Hotel Occupancy Fee; Atlantic County .....	10
<b>The Southern Shore Region’s Average Spend by Trip Purpose: Cape May and Cumberland Counties</b> .....	11
Figure 11: Spending on Food & Drink, Shopping and Entertainment in the Southern Shore Region .....	11
Figure 12: The Southern Shore Region’s Hotel Occupancy Fee; Cape May and Cumberland Counties .....	11
Figure 13: The Skylands Region’s Hotel Occupancy Fee: Hunterdon, Morris, Somerset, Sussex, and Warren Counties.....	12
<b>Lodging Industry Performance in the Skylands, Delaware River, Gateway and Shore Region: Hotel Occupancy Fee</b> .....	12
Figure 14: The Delaware River Region’s Hotel Occupancy Fee; Burlington, Camden, Gloucester, Mercer and Salem Counties .....	12
Figure 15: The Gateway Region’s Hotel Occupancy Fee; Bergen, Essex, Hudson, Middlesex, Passaic and Union Counties.....	13
Figure 16: The Shore Region’s Hotel Occupancy Fee; Monmouth and Ocean Counties.....	13
<b>Thank You New Jersey’s Destination Marketing Organizations</b> .....	14
<b>New Jersey Destination Marketing Organization (NJDMO) Members</b> .....	14
<b>Research Team</b> .....	15
<b>Advisory Board</b> .....	Back Cover

# Lodging Demand in New Jersey: Record Year in 2012

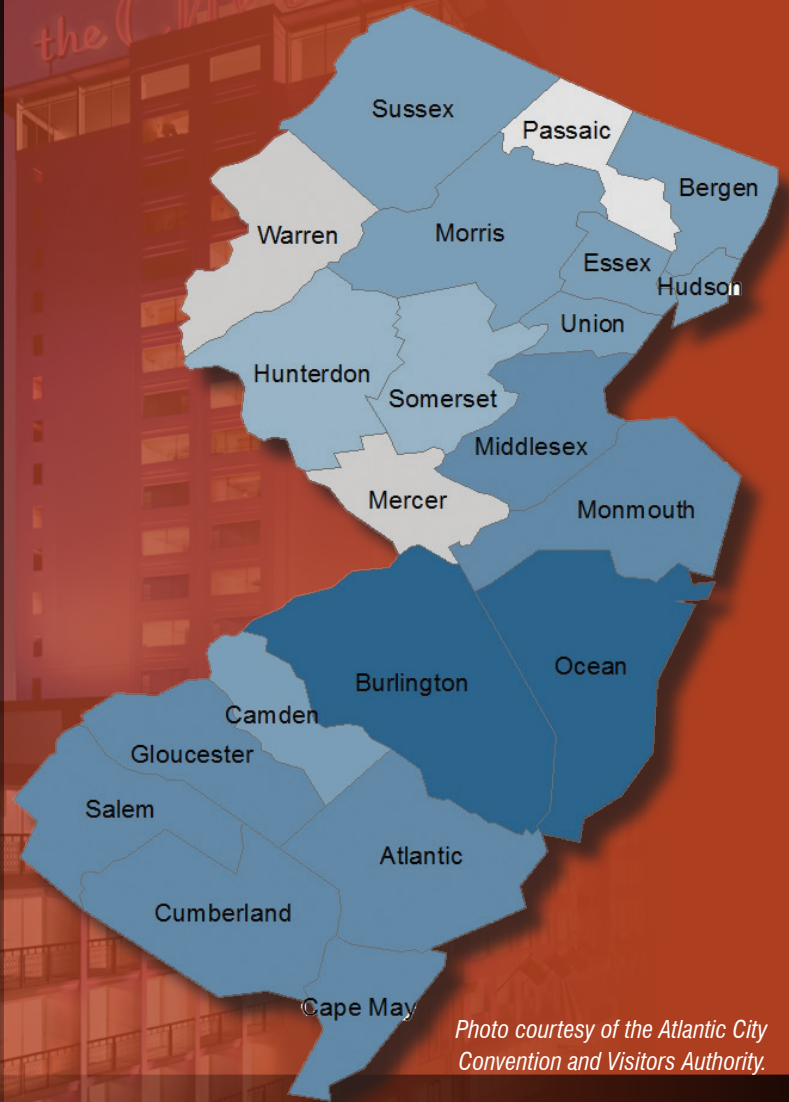
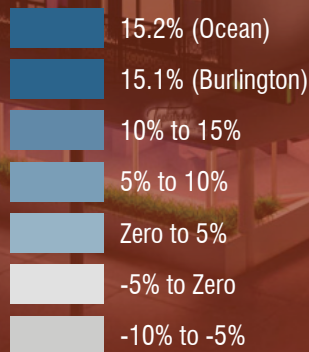
In 2012, the State of New Jersey's lodging industry experienced record sales as evidenced by the \$87 million in NJ Hotel Motel Occupancy Fee, the most ever recorded (see Figure 1). Demand for rooms has increased three straight years now, dating back to 2010. As early as August of 2012, the lodging industry in New Jersey had set a 12 month record at \$83.6 million for the period of September 2011 through August of 2012. It was assumed it would end the calendar year right at approximately \$83 million.

Of course, no one could have foreseen the arrival of Hurricane Sandy and what impact that might have for lodging demand in the State of New Jersey. The fourth quarter of 2012 saw lodging demand increase almost throughout the state of New Jersey, and in particular Ocean and Monmouth Counties (see maps in Figure 1 and 2). At the end of the year, rather than \$83 million in tax receipts from the states lodging industry, New Jersey's hotels and motels would produce \$87 million. The need for rooms during the recovery effort would bring a fourth quarter with revenues up statewide 21% compared with the fourth quarter of 2011.

**Figure 1: State of New Jersey Hotel Motel Occupancy Fee<sup>1</sup>**

<sup>1</sup> NJ Division of Taxation (2013). New Jersey Hotel and Motel Occupancy Fee: Monthly Report by Counties. Available online at: <http://www.state.nj.us/treasury/taxation/hotelcounty.shtml>

## 2012 Change

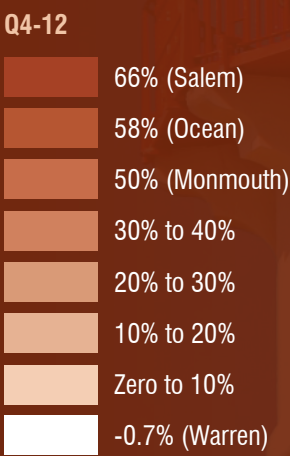
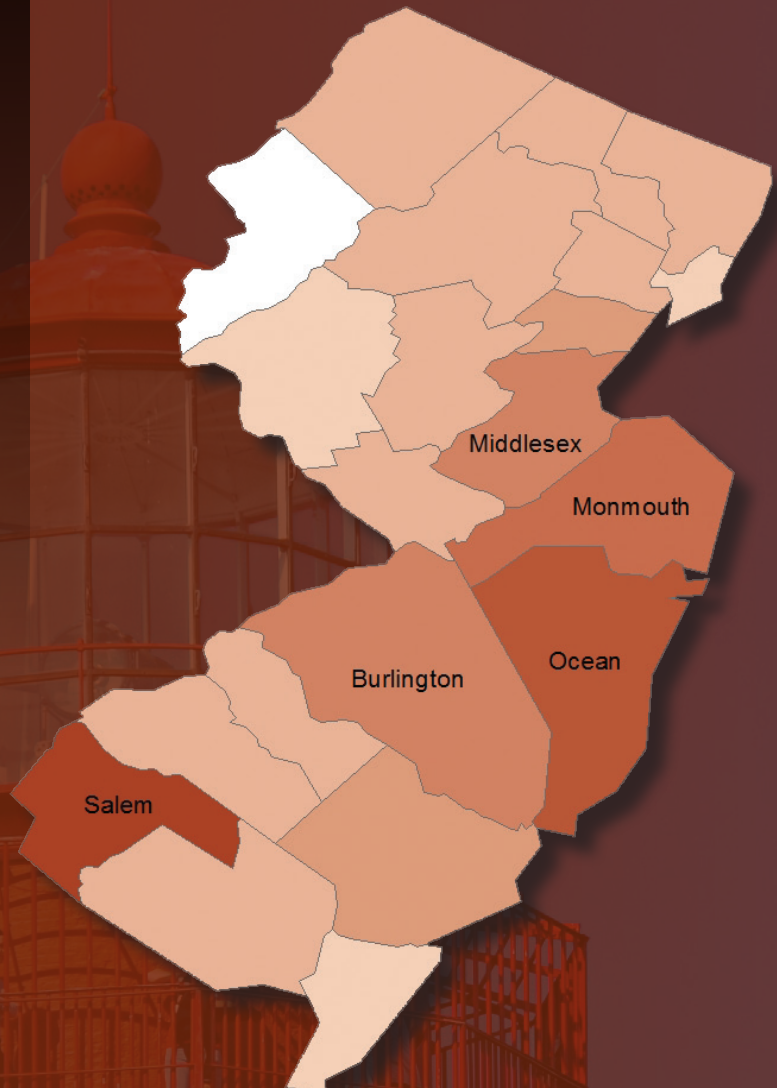


# Hurricane Sandy and 4th Quarter Lodging Demand

The recovery effort that would follow Hurricane Sandy's arrival would find demand for lodging up in 20 of 21 counties in New Jersey (see Figure 2). From out of state visitors including Federal Emergency Management Administration (FEMA), the Red Cross and construction officials, to in state volunteer groups and displaced residents; demand was up 21% statewide. Gains of over 50% in the fourth quarter (as compared to the fourth quarter of 2011) were realized in Salem, Ocean and Monmouth Counties. Burlington and Middlesex would be up over 30%. Union and Atlantic Counties saw fourth quarter revenue up over 20%.

For information on donating to a New Jersey Chapter of the American Red Cross please visit [www.redcross.org](http://www.redcross.org).

**Figure 2: NJ Hotel Motel Occupancy Fee, 4th Fourth Quarter 2012<sup>1</sup>**



*Photo courtesy of the Cape May County Department of Tourism.*

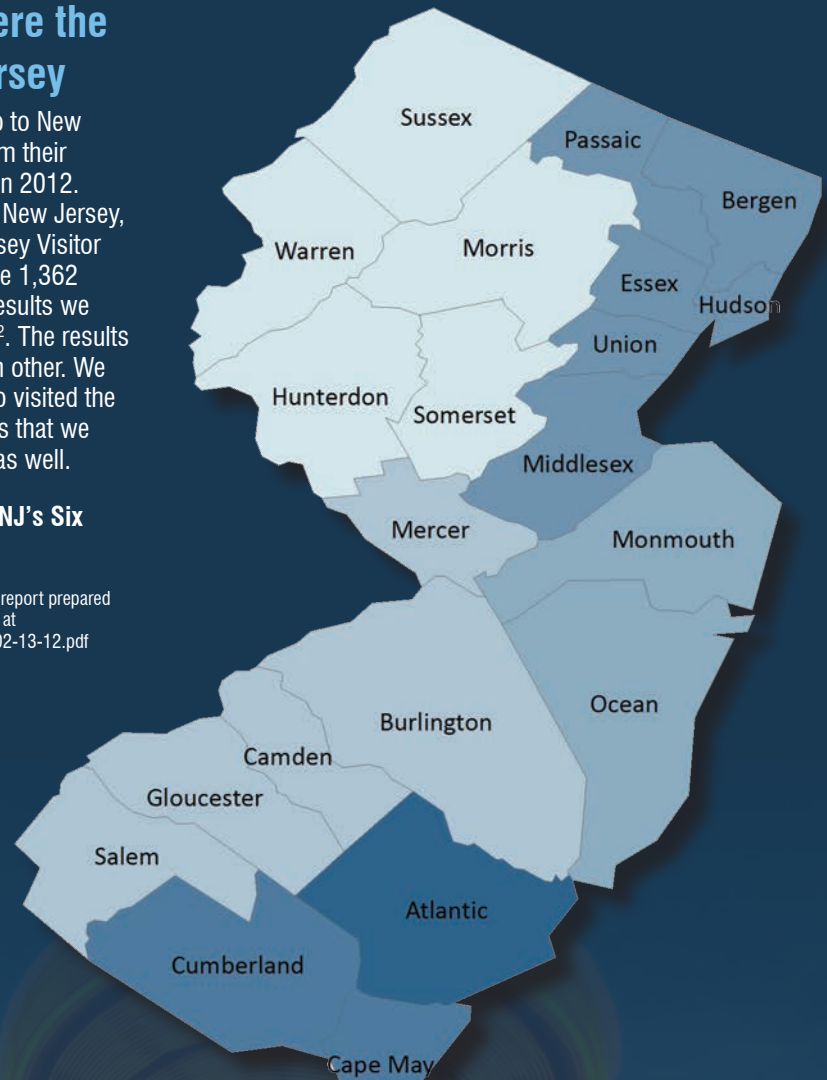
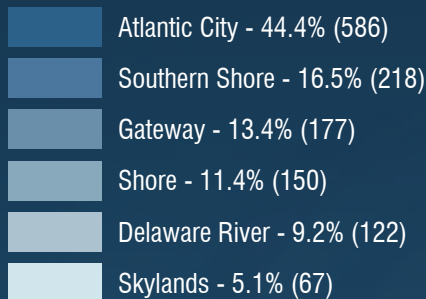
## 2013 Tourism Promotion Survey – NJ Visitor Profile Study: Where the Visitors are going in New Jersey

Respondents were asked if they had taken a trip to New Jersey that was at least an hour or 50 miles from their home to visit a tourist attraction in New Jersey in 2012. Roughly a third (35.5%) had visited the state of New Jersey, representing 1,362 respondents to the New Jersey Visitor Profile Study. Figure 3 below shows where those 1,362 respondents had visited. It also compares the results we obtained with those of DK Shifflet's 2011 study<sup>2</sup>. The results are within an acceptable margin of error of each other. We also have enough of a sample size of those who visited the Greater Atlantic City and Southern Shore regions that we can devote some time to profiling their visitors as well.

**Figure 3: New Jersey Destinations Visited by NJ's Six Tourism Regions**

<sup>2</sup> DK Shifflet (2012). New Jersey Overnight Leisure Visitor Profile. A report prepared for the New Jersey Division of Travel and Tourism. Available online at <http://www.visitnj.org/sites/visitnj.org/files/2011-nj-visitor-profile-02-13-12.pdf>

### Percent Sample



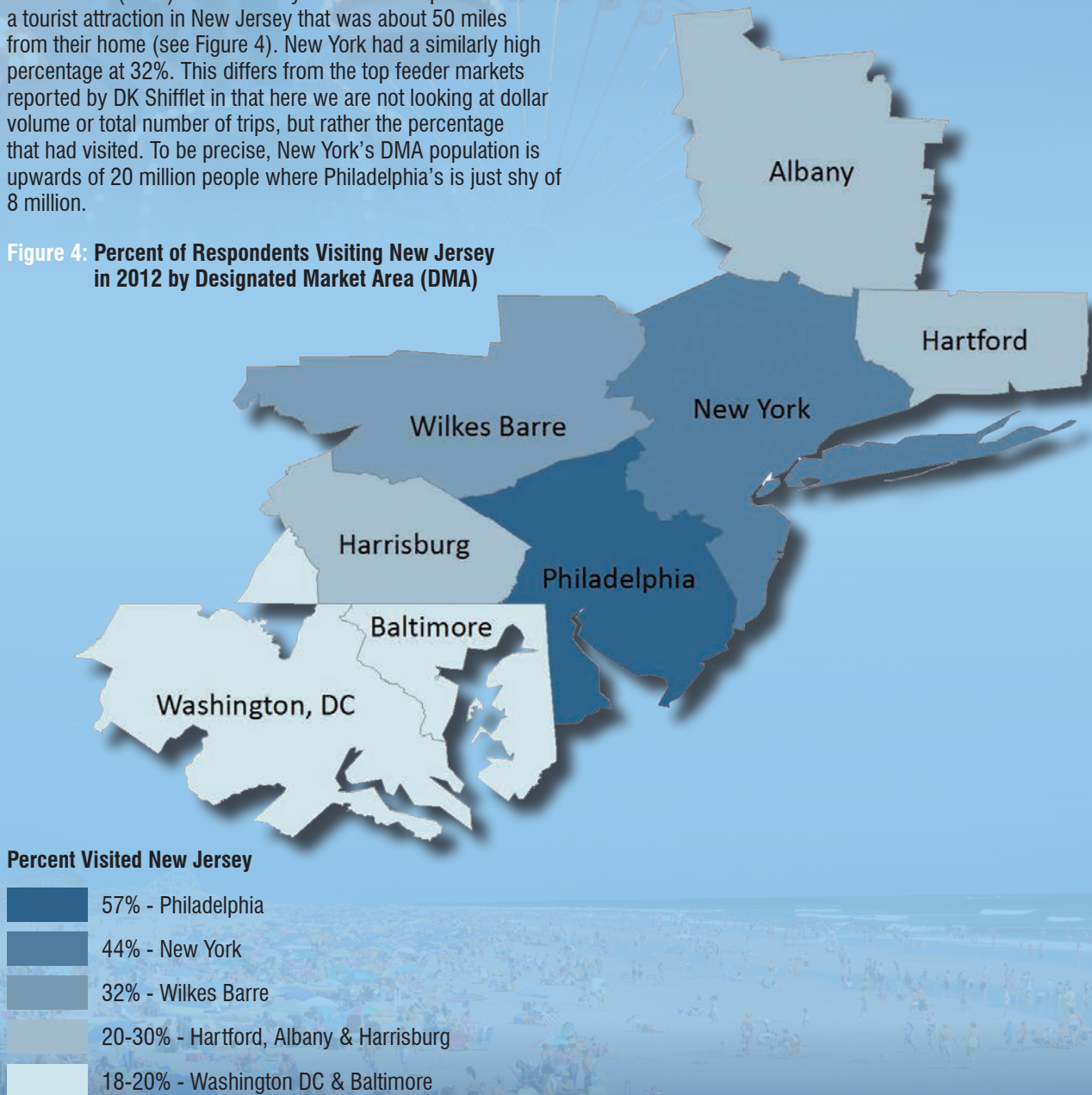
NJ Tourism Region	2013 Tourism Promotion Survey	2011 DK Shifflet's <sup>2</sup> Study
Greater Atlantic City	44.4%	39.4%
Southern Shore	16.5%	18.9%
Gateway	13.4%	18.8%
Shore	11.4%	12.9%
Delaware River	9.2%	5.1%
Skylands	5.1%	5.0%

*Photo courtesy of the Greater Wildwoods Tourism Improvement and Development Authority.*

## New Jersey's Visitor Profile: Where the Visitors are Coming From

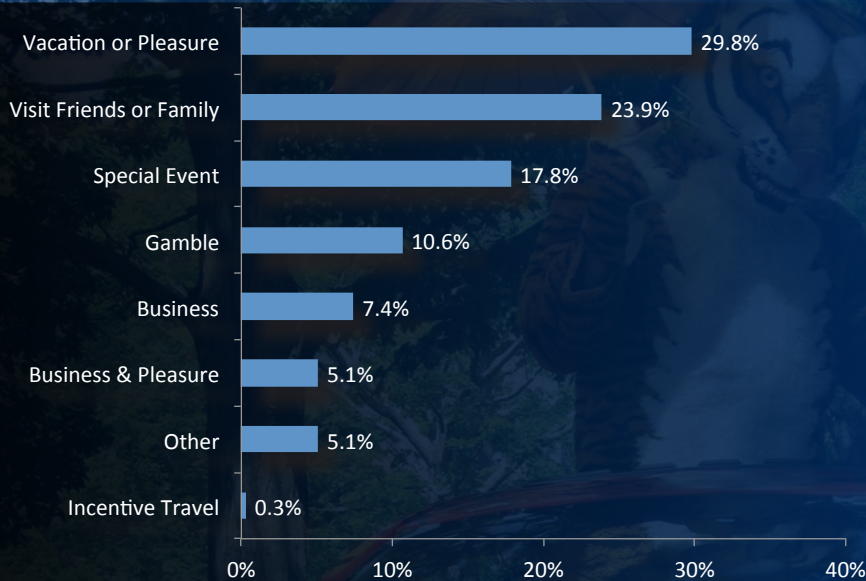
Over half (57%) of respondents from the Philadelphia Designated Market Area (DMA) indicated they had taken a trip to visit a tourist attraction in New Jersey that was about 50 miles from their home (see Figure 4). New York had a similarly high percentage at 32%. This differs from the top feeder markets reported by DK Shifflet in that here we are not looking at dollar volume or total number of trips, but rather the percentage that had visited. To be precise, New York's DMA population is upwards of 20 million people where Philadelphia's is just shy of 8 million.

**Figure 4: Percent of Respondents Visiting New Jersey in 2012 by Designated Market Area (DMA)**



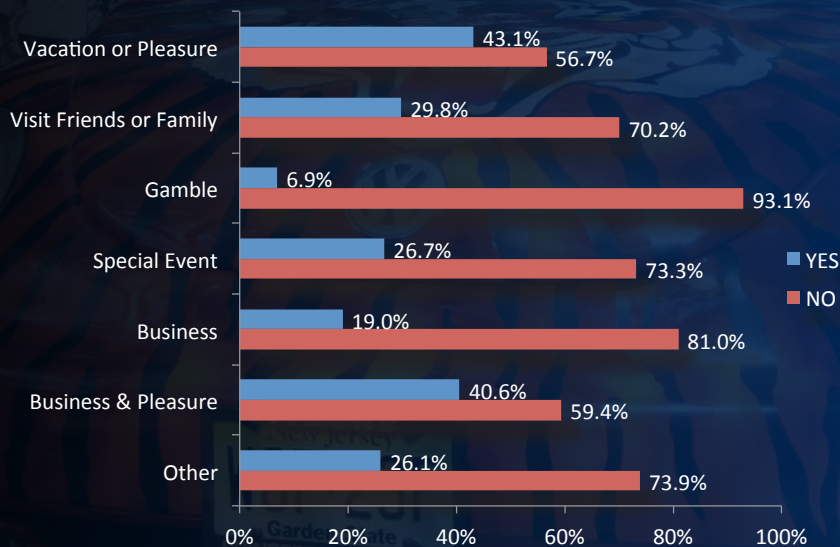
*Photos courtesy of the Greater Wildwoods Tourism Improvement and Development Authority.*

## New Jersey's Visitor Profile: Why the Visitors Came – Primary Trip Purpose



**Figure 5: Primary Trip Purpose**

Nearly a third (30%) of visitors indicated they had come to New Jersey to vacation (see Figure 5), followed closely by the very important visiting friends and relatives market (24%). Special events drew nearly 1 out of 5 respondents (18%) to the state. All of those individuals indicating they primarily took their trip to gamble (11%) were headed to the Greater Atlantic City region. We will use trip purpose as a basis for segmenting the visitor in the following pages.



**Figure 6: Minors in Travel Party by Primary Trip Purpose**

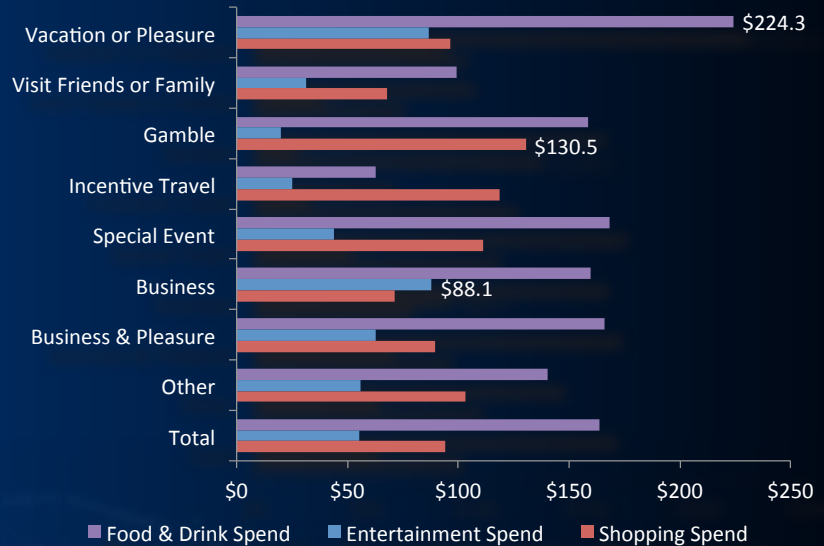
New Jersey has always been known for and marketed as a family resort, but that differs markedly by the primary trip purpose (see Figure 6). Not unexpectedly, those respondents primarily traveling to vacation had the highest rate (43%) of suggesting a minor was in their trip party. Interestingly, the second most prevalent visitor segment by trip purpose were those individuals who distinguished themselves as traveling primarily for both business and pleasure (41%).



# New Jersey's Visitor Profile: Visitor Spending and Average Length of Stay in NJ by Trip Purpose

**Figure 7: Spending on Food & Drink, Shopping and Entertainment by Trip Purpose**

Spending was by far the highest on food and drink, consistent with what we expect from past studies (see Figure 7). The highest spending (\$224) on food and drink was in the vacation segment. Business travelers spent the most on entertainment (\$88). Meanwhile, gamblers recorded the highest average spend on shopping (\$130).



**Figure 8: Average Length of Stay (Nights) by Trip Purpose**

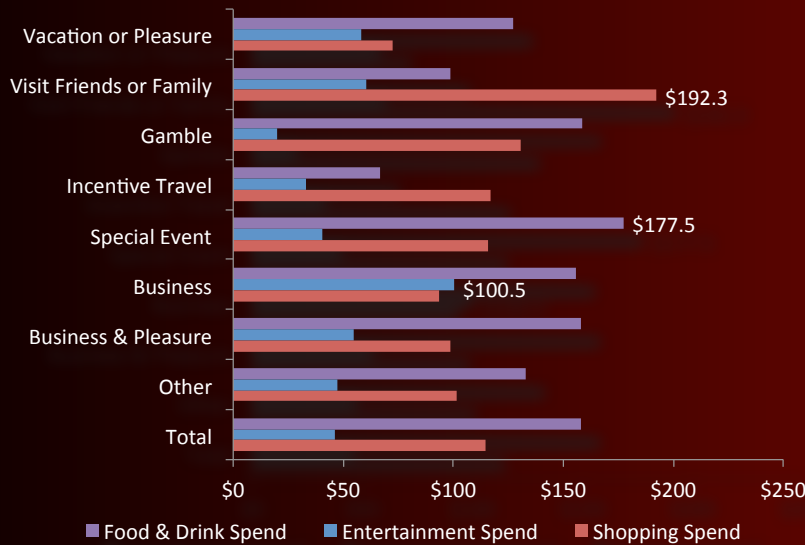
The most number of nights spent (5.5) at the destination were reported by those whose primary trip purpose was to vacation (see Figure 8). Gamblers had the shortest average length of stay at 2.2 nights.



Photo courtesy of the Meadowlands Liberty Convention and Visitors Bureau.

# The Greater Atlantic City Region's Average Spending by Trip Purpose: Atlantic County

**Figure 9: Spending on Food & Drink, Shopping and Entertainment in Atlantic County by Trip Purpose**



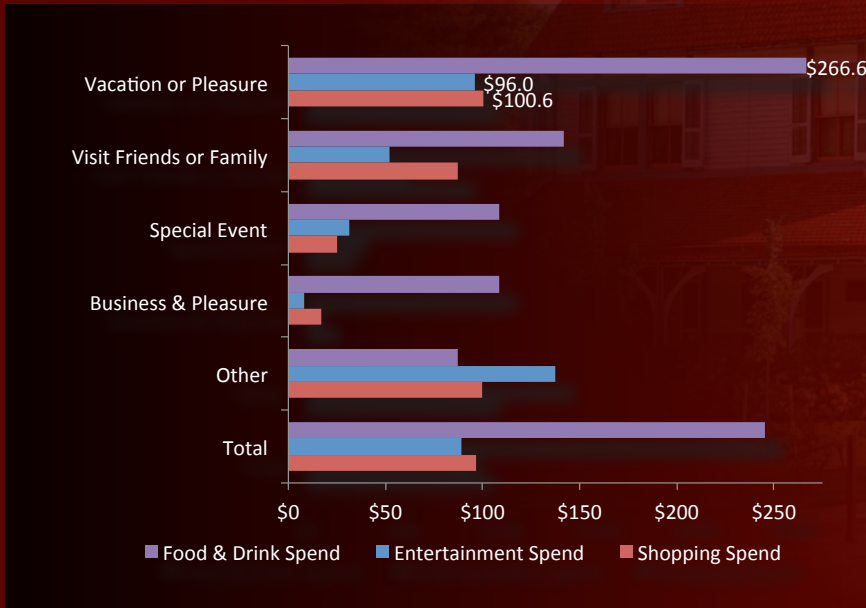
Interestingly, when looking at the entire sample the highest spending on shopping was by those primarily to gamble (\$130, see Figure 7), however, it is not the highest spending on shopping for folks visiting Atlantic City; the visiting friends and family (VFR) segment traveling to Atlantic City spent over 50% more at \$192 (see Figure 9). Meanwhile, the highest average spends on food and drink for visitors to Atlantic City were visitors attending a special event (\$177). Business travelers to Atlantic City, as was the case with all travelers to New Jersey, spent the most on entertainment (\$101).

**Figure 10: The Greater Atlantic City Region's Hotel Occupancy Fee; Atlantic County**



Photo courtesy of the Atlantic City Convention Visitors Authority.

# The Southern Shore Region's Average Spending by Trip Purpose: Cape May and Cumberland Counties



**Figure 11: Spending on Food & Drink, Shopping and Entertainment in the Southern Shore Region by Trip Purpose**

As expected, the spending by visitors to the Southern Shore was dominated by the traditional vacation traveler (see Figure 11). With the lone exception of entertainment spend by those who did not specify a trip purpose, the traditional vacation traveler spent more on food and drink (\$267), entertainment (\$96) and shopping (\$101) than any other trip purpose segment traveling to the Southern Shore region. No one traveling to the Southern Shore region reported their primary trip purpose as gambling, incentive travel or traveling primarily for business.

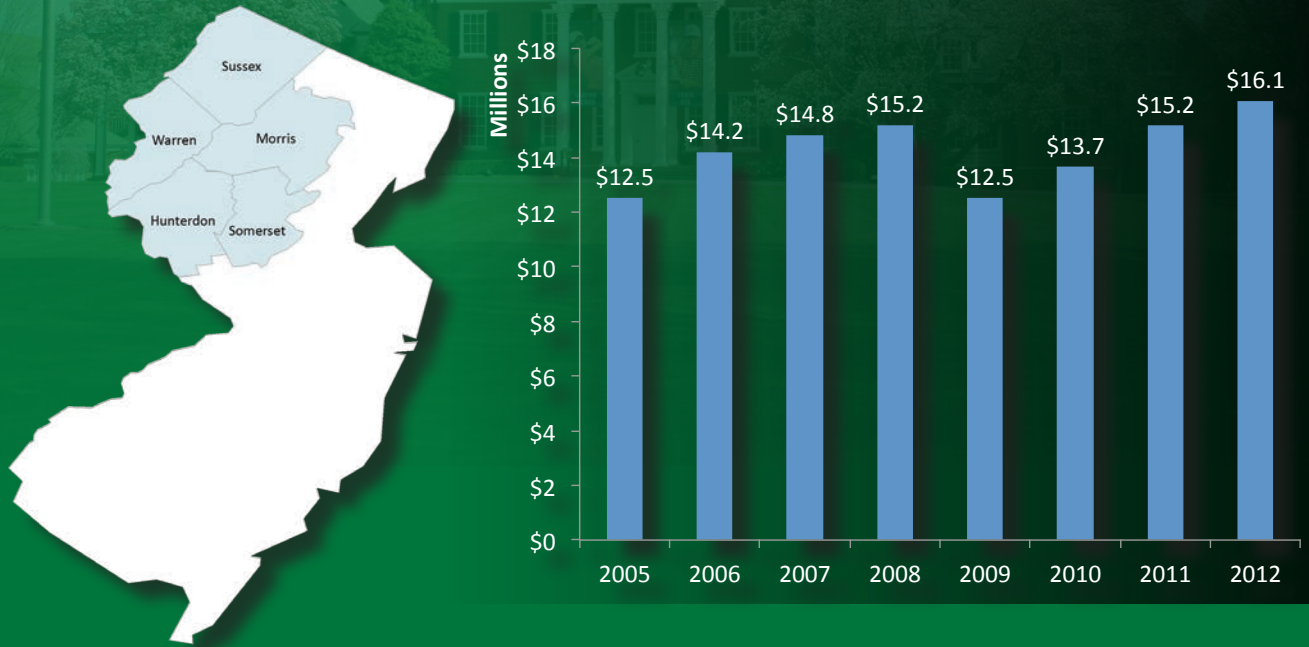
**Figure 12: The Southern Shore Region's Hotel Occupancy Fee; Cape May and Cumberland Counties**



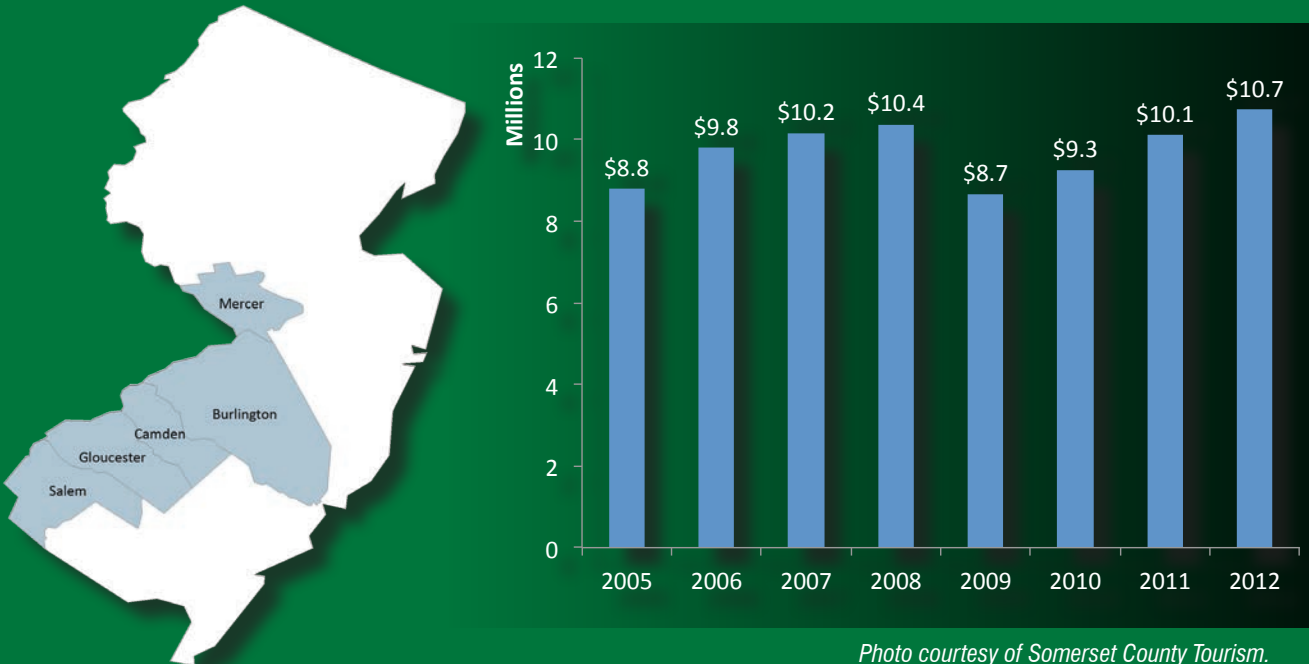
Photo courtesy of the Cape May County Department of Tourism.

# Lodging Industry Performance in the Skylands, Delaware River, Gateway and Shore Region: Hotel Occupancy Fee

**Figure 13:** The Skylands Region's Hotel Occupancy Fee; Hunterdon, Morris, Somerset, Sussex, and Warren Counties

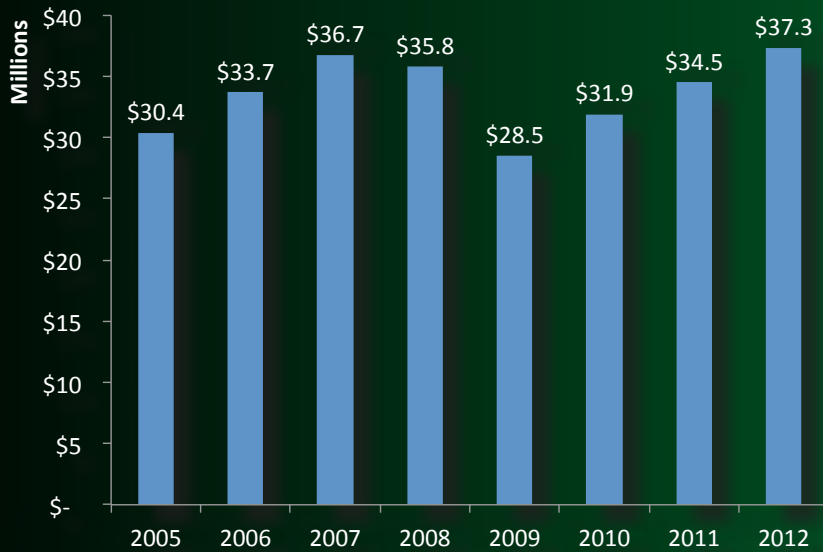


**Figure 14:** The Delaware River Region's Hotel Occupancy Fee; Burlington, Camden, Gloucester, Mercer and Salem Counties



*Photo courtesy of Somerset County Tourism.*

**Figure 15: The Gateway Region's Hotel Occupancy Fee; Bergen, Essex, Hudson, Middlesex, Passaic and Union Counties**



**Figure 16: The Shore Region's Hotel Occupancy Fee; Monmouth and Ocean Counties**



*Photo courtesy of the Monmouth County Public Information and Tourism.*



## Thank You New Jersey's Destination Marketing Organizations

The Lloyd D. Levenson Institute of Gaming, Hospitality and Tourism (LIGHT) wishes to thank the Destination Marketing Organizations throughout the state of New Jersey, both large and small, public and private, for doing their part in the post-Sandy recovery effort in the state of New Jersey. In particular, we'd like to acknowledge the tireless efforts of the member organizations in the New Jersey Destination Marketing Organization (NJDMO). It is through the public relations efforts of these organizations and countless individuals that we are getting the word out to current and potential visitors that *NEW JERSEY IS OPEN FOR BUSINESS.*

*Thank You*

**New Jersey Destination Marketing Organization (NJDMO) Members**  
[newjerseydmo.org](http://newjerseydmo.org)

Atlantic City Convention and Visitors Bureau  
Destination Jersey City  
Destination Trenton  
Go Central Jersey  
Greater Newark Convention and Visitors Bureau  
Hunterdon County Chamber of Commerce: Hunterdon Tourism  
Meadowlands Liberty Convention and Visitors Bureau  
Morris County Tourism Bureau  
Princeton Regional Convention and Visitors Bureau  
Somerset County Chamber Of Commerce: Somerset County Tourism  
South Jersey Tourism Corporation  
Southern Ocean County Chamber of Commerce: Long Beach Island Region  
Southern Shore Region DMO  
Sussex County Chamber Of Commerce: Sussex Skylands  
The Real Jersey Shore  
Warren County Convention and Visitors Bureau  
Wildwood Convention and Visitors Bureau

*Photo courtesy of the Cape May  
County Department of Tourism.*

LLOYD D. LEVENSON INSTITUTE  
OF GAMING, HOSPITALITY & TOURISM  
THE RICHARD STOCKTON COLLEGE OF NEW JERSEY

Interviews were conducted at the Stockton Polling Institute by live interviewers calling from the Stockton College campus. The project included three surveys of adults in the designated market areas (DMAs) of Albany, New York, Philadelphia, Hartford, Harrisburg, Baltimore, Washington, D.C., and Wilkes Barre. Calls were fielded between Jan. 24 and March 6 for completed interviews with: 814 residents of the Northeast DMAs who did not visit New Jersey in 2012; 811 Northeast residents who visited New Jersey but not Atlantic City in 2012; and 693 Northeast residents who visited Atlantic City in 2012.

Interviewers called both land lines and cell phones. All prospective respondents and households in the source telephone list have the same chance of joining the sample because of the random digital dialing system (RDD). The Northeast and New Jersey visitor surveys have a margin of error of +/- 3.5 percent at the 95% confidence level. The Atlantic City visitor survey has a margin of error of +/- 3.7 percent at the 95% confidence level. The MOE in subgroups is larger.

Phone surveys and data collection were performed by the Stockton Polling Institute. Data analysis and the preparation of this report were performed by the LIGHT Research Team.

## Research Team



**Brian J. Tyrrell, Ph.D.,  
(PURDUE UNIVERSITY)**

*Lead Researcher*  
*Associate Professor, Hospitality and  
Tourism Management Studies*

101 Vera King Farris Drive  
Galloway, NJ 08205-9441  
**(609) 652-4759 (Office)**  
**(609) 626-6045 (Fax)**  
**Brian.Tyrrell@Stockton.edu**



**Israel Posner, Ph.D.,  
(TEMPLE UNIVERSITY)**

*Executive Director, Lloyd D.  
Levenson Institute of Gaming,  
Hospitality and Tourism*

35 S. Dr. Martin Luther King Jr.  
Blvd., Atlantic City, NJ 08401  
**(609) 347-2168 (Office)**  
**Israel.Posner@Stockton.edu**  
**www.stockton.edu/levenson**

*Photo courtesy of the Southern Ocean County  
Chamber of Commerce: Long Beach Island Region.  
Back Cover photo courtesy of the Greater Wildwoods  
Tourism Improvement Development Authority.*

### Sponsored by the:

LLOYD D. LEVENSON INSTITUTE  
OF GAMING, HOSPITALITY & TOURISM  
THE RICHARD STOCKTON COLLEGE OF NEW JERSEY

LLOYD D. LEVENSON INSTITUTE  
OF GAMING, HOSPITALITY & TOURISM  
THE RICHARD STOCKTON COLLEGE OF NEW JERSEY

Brian J. Tyrrell, PhD  
Senior Research Fellow

Israel Posner, PhD  
Executive Director

**CARNEGIE CENTER**

35 S. Dr. Martin Luther King Jr. Blvd. | Atlantic City, NJ 08401  
609.347.2168 | [www.stockton.edu/levenson](http://www.stockton.edu/levenson)

**ADVISORY BOARD**

Mr. Robert Boughner	Dr. Harvey Kesselman*
Mr. Tom Ballance	Mr. Edward Kline
Ms. Liza Cartmell*	Mr. Charles Kramer
Mr. Anthony Catanoso	Ms. Liane Levenson
Mr. Norman Cohn	Mr. Lloyd D. Levenson, Esq.
Mr. Keith Dawn	Mr. D. Herbert Lipson
Mr. Kevin DeSanctis	Mr. George Lynn
Mr. Ron DiMenna	Mr. Vincent Maione
Mr. Andy Dolce	Ms. Gina Merritt Epps, Esq.
Mr. Frank Dougherty	Mr. John Palmieri*
Mr. Michael Frawley	Mr. Robert Pickus
Mr. Mark Giannantonio	Mr. Tom Pohlman
Mr. Edward Graham	Dr. Israel Posner*
Mr. Gary Hill	Dr. Herman Saatkamp*
Mr. Joseph Jacobs, Esq.	Mr. Anthony Rodio
Mr. Mark Juliano	Mr. Gary Van Hettinga
Ms. Lynne Kaufman, Esq.	Mr. Jeffrey Vasser*
Mr. Joseph Kelly*	Honorary Member: Mr. Dennis Gomes (Deceased)

\*Ex-Officio

**STOCKTON**  
NEW JERSEY'S  
**DISTINCTIVE**  
Public College

[www.stockton.edu](http://www.stockton.edu)

Stockton College is an AA/EQ institution.