STOCKTON COLLEGE

THE RICHARD STOCKTON COLLEGE OF NEW JERSEY

1st Annual Survey to Improve the Effectiveness of Tourism Promotion

Conducted by the

New Jersey Center for Hospitality and Tourism Research

in conjunction with the center's

Statewide 2006/2007 Advisory Group

and

Zogby International

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Executive Summary

Visitor-related in spending in New Jersey was **$37.6 billion in 2006**, a healthy 5.1% increase over the previous year. **Employment** in the tourism industry experienced even healthier growth with **472.3 thousand residents** of New Jersey relying either directly or indirectly on travel and tourism for their livelihood, 9.8% higher than the previous year. With a relatively modest budget, $12.76 million in fiscal year 2006, the New Jersey Commerce, Economic Growth & Tourism Commission was charged with promoting the state's travel and tourism industry.

The majority of this $37.6 billion in tourism expenditures is revenue generated from sources outside of the state. **In 2006, nearly 70% of the dollars spent on tourism in the state of New Jersey originated outside of the state.**

Relative to its status as the eighth leading generator of tourism expenditures in the US, the state of **New Jersey has been under-funding the promotion of New Jersey for some time**. This under funding is exaggerated even further when you consider funding in New Jersey relative to our closest competition in the US.

The Annual Survey to Improve the Effectiveness of Tourism Promotion hopes to help the state in its effort at promoting New Jersey as a destination. It consists of a survey of adults in New Jersey, New York, Pennsylvania, Maryland, Connecticut, and Massachusetts. The data was collected by Zogby International who also assisted with this analysis. **The survey generated 1,400 interviews with approximately 45 questions asked.**

The survey revealed a **majority of respondents take trips away from home yearly**. These trips are most often taken by car, and hotels are the most frequently chosen accommodations. Respondents agree that they generally travel for a week, although **New Yorkers are more likely than anyone else to travel for a long weekend**. Four to six days is the next most frequently chosen length of time to be away from home.

When respondents think about travel, price, family activities, lodging, and food are the top priorities. Events and entertainment are equally important with 43% apiece, and nightlife and shopping are at the bottom of the pile. Price is the most important factor to more than half of respondents ranging in age from 18-49.

Friends and family are the two most commonly used sources for travel information. When respondents are asked where they have seen or heard anything about New Jersey though they mention television first. One could speculate that the difference is that they don't just happen to see information on the Internet, they go looking for it.

Overall, there is little dissatisfaction with trips away from home, with nearly two thirds agreeing that they have mostly been what they expected, and nearly a third experiencing better than expected trips away. Respondents who had a worse than expected vacation experience didn't claim one reason, but a variety of reasons. Many simply listed other.

A majority of respondents had visited New Jersey, and more than half had vacationed there. Most have not lived in New Jersey however. Twenty-eight percent of respondents visited New Jersey 2-10 times per year, 20% visit once a year and 20% less than once a year.

When respondents have been impressed with New Jersey it has been as a result of a particular activity, or the wide variety of activities. Thirty-six percent have been inspired to mention New Jersey to a friend or family member, 28% were stimulated to consider New Jersey as a vacation destination and 27% investigated some kind of trip to the Garden State. **The verbatim general perceptions are generally quite positive, with respondents citing beaches, the shore, good vacations, and lots of activities.**

Generally speaking, respondents have been to New Jersey for one reason or another. Many of them have positive perceptions of the state**. Vacationers tend to use word of mouth or recommendations of friends for information about holiday destinations.** Respondents do however, remember and react to television messages regarding vacation destinations.

Most visitors to the state of New Jersey reside in both the Philadelphia and New York DMA's. Focusing advertisements on Washington, DC, Boston, MA and Baltimore, MD, in particular, might help to expand the market for New Jersey as a destination and thusly improve New Jersey's standing as a leader in tourism in the Mid-Atlantic Region. **This, however, will require a commitment to funding the promotional efforts of the state.**

Introduction

On January 12th 2006 the New Jersey Tourism Restructuring Act (A-4055/S-2680) was signed into law by then Governor Richard Codey. Section 1A-54 of the act commissioned the:

> …New Jersey Center for Hospitality and Tourism (Research) at (The) Richard Stockton College of New Jersey to conduct an annual survey and analysis of New Jersey's tourism industry for the purpose of providing data to improve the effectiveness of tourism promotion. The council shall direct the division to make the survey and analysis results available to tourism groups throughout the State…

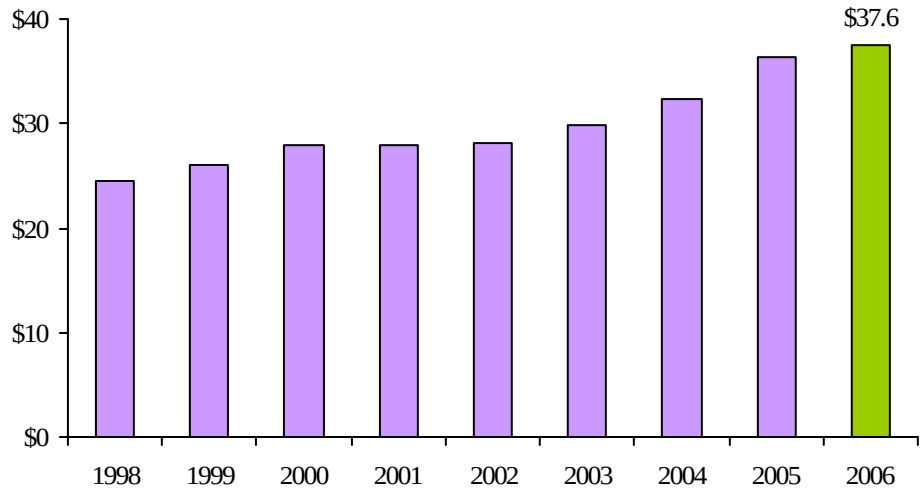
The following report represents the results of the first of these annual surveys to improve the effectiveness of tourism promotion in the state of New Jersey.

The work could not have been completed without the assistance of our Advisory Group (see Appendix A: Special Thanks to our Statewide 2006 – 2007 Advisory Group), the staff at the New Jersey Office of Travel and Tourism (see Appendix B: New Jersey Office of Travel and Tourism Staff), Zogby International, and the staff of the New Jersey Center for Hospitality and Tourism Research at the Richard Stockton College of New Jersey (see Appendix C: About the New Jersey Center for Hospitality and Tourism Research at the Richard Stockton College of New Jersey).

2006 Tourism Performance in New Jersey

Travel and tourism is vital to the state economy in New Jersey. It is estimated that visitor-related spending in 2006 was $37.6 billion, a healthy 5.1% increase over the previous year[1]. Employment in the industry experienced even healthier growth with 472.3 thousand residents of New Jersey relying either directly or indirectly on travel and tourism for their livelihood, 9.8% higher than the previous year. With a relatively modest budget, $12.76 million in fiscal year 2006, the New Jersey Commerce, Economic Growth & Tourism Commission is charged with promoting the state's travel and tourism industry. Figure 1 shows the successes experienced by the tourism industry in the state of New Jersey over the past nine years.

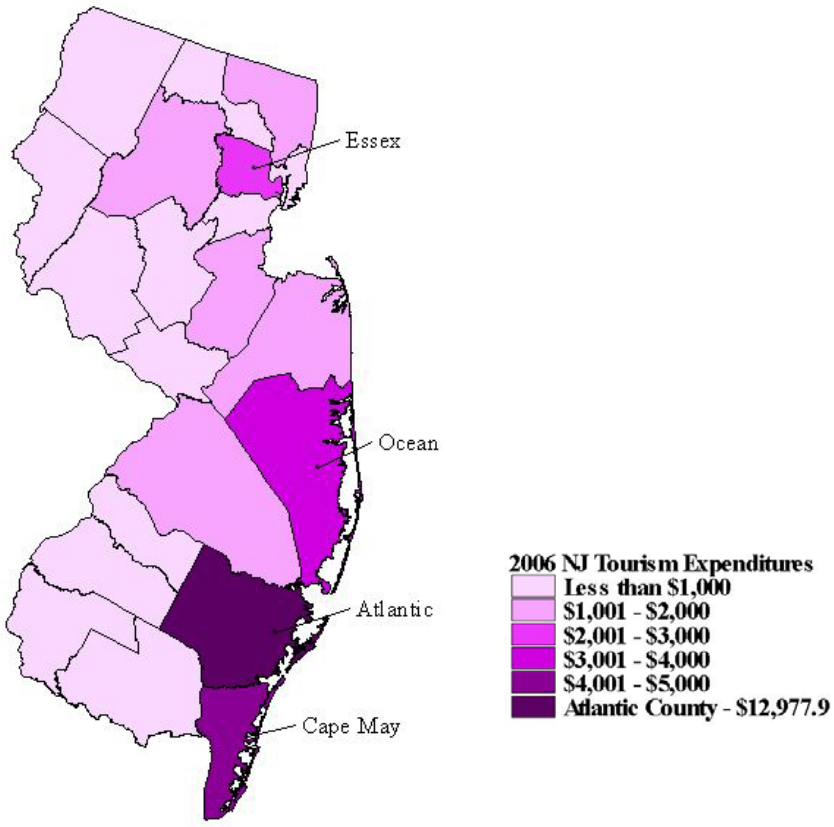
Figure 1: New Jersey tourism expenditure growth in billions of dollars



[1] Global Insight. (2007). NJ Tourism Continues to Impress. Retrieved, April 5, 2007 from New Jersey Commerce, Economic Growth & Tourism Commission website: http://www.state.nj.us/travel/ppt/fy2006-04-tourism-ecom-impact.ppt

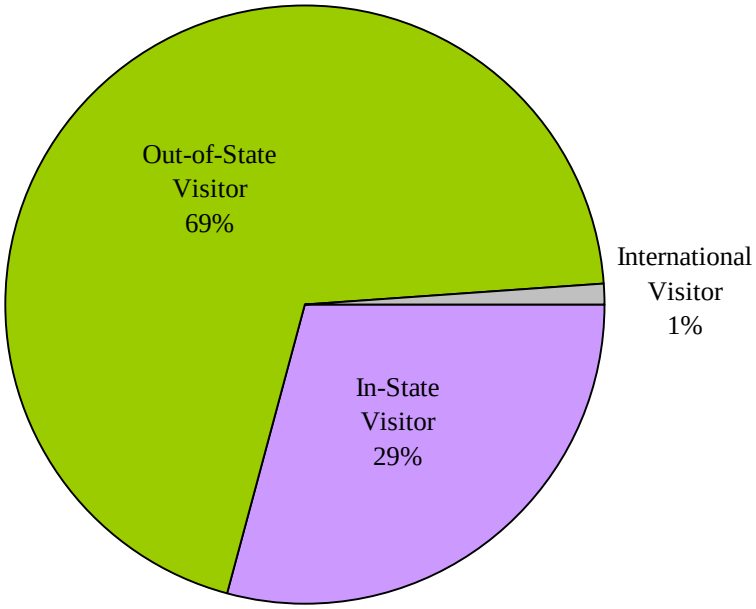
There exists a huge disparity with respect to how the counties benefit from tourism. Global Insight also reports performance by county; this report is replicated in Figure 1 below. Atlantic County accounts for over a third of the tourism expenditures in the state with nearly $13 billion in tourism expenditures in 2006. Cape May was the next largest generator of tourism expenditures in 2006 at $4.85 billion. Both Ocean County ($3.23 billion) and Essex County ($2.47 billion) are significant contributors to the state's total tourism expenditures. Monmouth, Bergen, Burlington, Middlesex, and Morris Counties also recorded tourism expenditures in excess of $1 billion.

Figure 2: 2006 New Jersey tourism expenditures in $Millions by county[2]



The majority of this $37.6 billion in tourism expenditures is revenue generated from sources outside of the state. In 2006, nearly 70%[2] of the dollars spent on tourism in the state of New Jersey originated outside of the state. This is particularly impressive as the tourism expenditures that would serve to have the greatest economic impact on the state would be those dollars brought into the state from outside of New Jersey. It is these dollars that should be most aggressively pursued through promotional efforts of New Jersey. Excluding import leakage, $27 billion in tourism expenditures were brought into the state in 2006. Figure 3 graphically depicts the breakdown of tourism expenditures by source of origin.

Figure 3: Origin of tourism expenditure dollars



Changes in the New Jersey Office of Travel and Tourism Industries

Reorganization plan No. 005-2004 changed the name and mission of the New Jersey Commerce and Economic Growth Commission to the New Jersey Commerce, Economic Growth and Tourism Commission. With the change in title came a refocused

[2] Global Insight. (2007). NJ Tourism Continues to Impress. Retrieved, April 5, 2007 from New Jersey Commerce, Economic Growth & Tourism Commission website: http://www.state.nj.us/travel/ppt/fy2006-04-tourism-ecom-impact.ppt

mission meant to improve the profile of the tourism industry in the state of New Jersey as well as allowing it to more effectively compete with other travel destinations. One reality of this reorganization was that the Office of Travel and Tourism Industries would work "directly alongside the Marketing Department as well as the Communications Department to improve the marketing and public relations efforts that are completed."[3] A long-term marketing plan was put into place with the specific aim of increasing not only visitation, but also the number of overnight stays.

The improved marketing and, specifically, the public relations efforts undoubtedly contributed heavily to the success of the states travel and tourism industry. In addition to the above referenced growth figures, overnight visitation grew by 4.2%, wages rose 1.7 times faster than total New Jersey wage growth and the total impact from federal, state and local taxes for the industry rose 3.4% to $7.5 billion. The overnight visitation is particularly impressive given the state has, in the past, lagged behind other destinations in this regard.

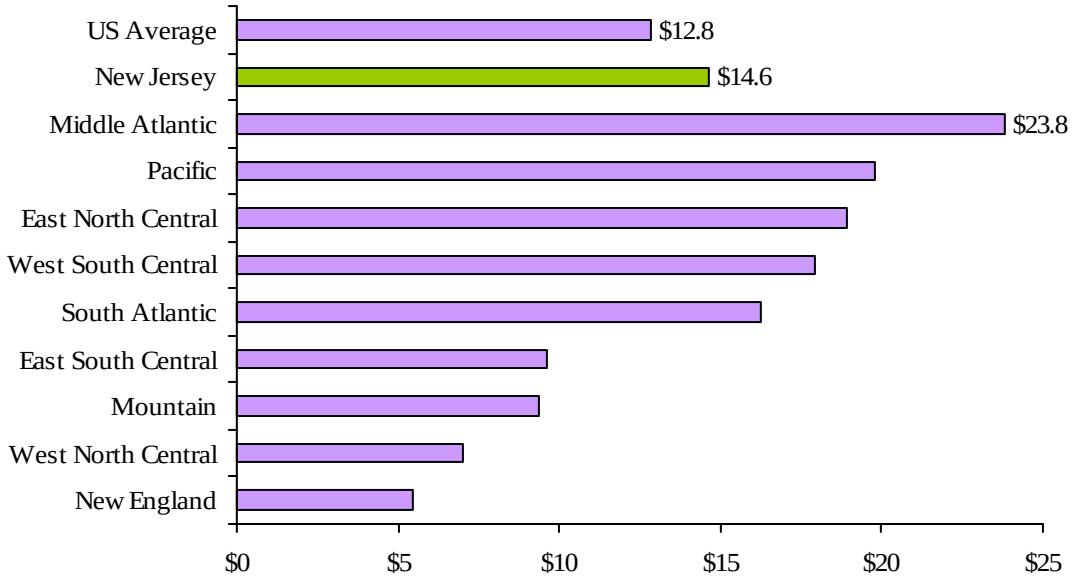
The state of New Jersey is moving the Office of Travel and Tourism to the Department of State in 2007. This will have implications for 2007 that are unclear as of the writing of this report. It is encouraging that the move will create greater synergies with, among other departments, the arts and history communities in New Jersey.

[3] New Jersey Commerce, Economic Growth & Tourism Commission. (2007). As Quoted in New Jersey Commerce, Economic Growth & Tourism Commission FY 2006 Budget Review: OLS Discussion Points. Retrieved March 15, 2007 from the New Jersey Legislatures website: http://www.njleg.state.nj.us/legislativepub/budget/DeptResponse/commerce_response.pdf

New Jersey Tourism Promotional Budget

Relative to its status as the eighth leading generator of tourism expenditures in the US, the state of New Jersey has been under funding the promotion of New Jersey for some time. This under funding is exaggerated even further when you consider funding in New Jersey relative to our closest competition in the US. Figure 4 below compares New Jersey's tourism promotional budget in 2005 with the average funding in regions throughout the US. It is particularly important to note how New Jersey compares with its Middle Atlantic competitors.

Figure 4: 2004/2005 average regional funding for tourism promotion in $millions[4]



With average budgets twice the size of New Jersey, the state is at a major disadvantage to its neighboring states in the Middle Atlantic Region. Indeed, Pennsylvania had a budget in fiscal 2005 of over $33 million compared with New Jersey's fiscal 2005 budget of $14.6 million. New Jersey's promotional budget has been on the decline since then, totaling only $12.76 million in fiscal 2006 and falling even further in fiscal 2007 to $10.25 million. Meanwhile the current proposal to maintain the same level of funding for fiscal 2008 at $10.25 million would find New Jersey falling

[4] Travel Industry Association of America. (2006). 2004-2005 Survey of U.S. State and Territory Tourism Office Budgets.

further behind competing states like Pennsylvania and New York. The state of New York has just proposed an increase of 50% for its "I Love New York" campaign.[5]

The state's efforts at promoting New Jersey as a travel destination are bolstered by regional, local and private sectors. This survey can not distinguish between the promotional efforts of the state and those of regional tourism councils, destination marketing organizations, convention and visitors authorities (bureaus), chambers of commerce and a myriad of other local entities. Confusing the matter more are the efforts of hospitality and tourism businesses promoting within the state, the word of mouth that is generated from previous stays, friends and family, and the publicity generated from all forms of media that is not paid for (i.e. television/radio/print news coverage). Thus, while this survey helps to establish a benchmark for future visitor response to promotional efforts of the state, it must be done in conjunction with a review of the state's contribution to the funding of regional and local promotional efforts. This survey then examines the combined efforts of the state, regional, local and private sector tourism organizations in New Jersey.

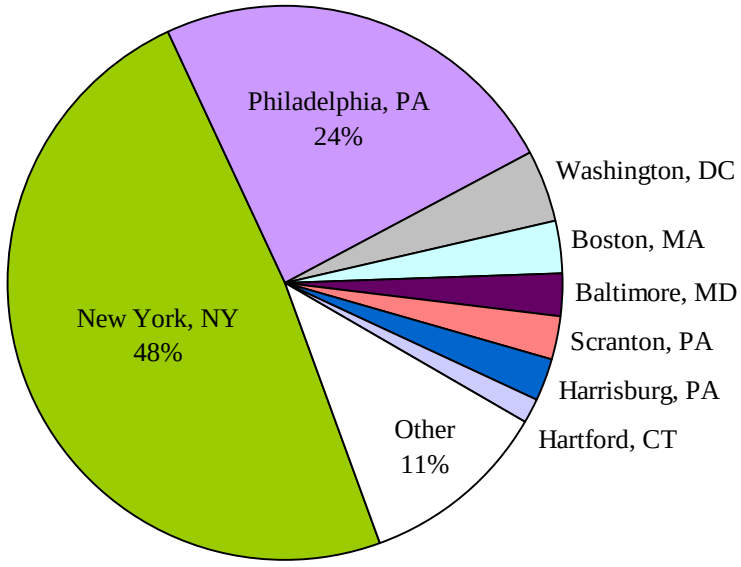
Perhaps the most pressing threat to the competitiveness of tourism regions in the state of New Jersey comes not from competing states as a whole, but more specifically from regional destination marketing organizations such as the Greater Philadelphia Tourism Marketing Corporation (GPTMC). Philadelphia is poised geographically between some of our prime feeder markets and the state of New Jersey. In 1995 Philadelphia spent only $200,000 to promote tourism in city (see Figure 5 and Figure 6 below). By contrast, the 2006 marketing budget for GPTMC to promote Philadelphia and the Countryside™ was almost $10 million.[6] This significant marketing budget on the part of GPTMC, combined with the recent addition of slots parlors at the city's race tracks, is a clear shot across the bow for tourism in the state of New Jersey.

[5]New York State Division of the Budget. (2007). New York State 2007-2008 Executive Budget Briefing Book. Retrieved from the New York State Division of the Budget website: http://publications.budget.state.ny.us/fy0708littlebook/BriefingBook.pdf

[6] Greater Philadelphia Tourism Marketing Corporation. (2007). Tourism 2006: Report to the Industry.

A 2006 study by Global Insight suggests that, combined, Philadelphia and New York City residents represent over 86% of visitors to the state of New Jersey (see Figure 5) This does not, however, account for overnight visitors. Attempts at increasing visitation from areas outside of Philadelphia and New York City have rightly focused on increasing overnight visitation.

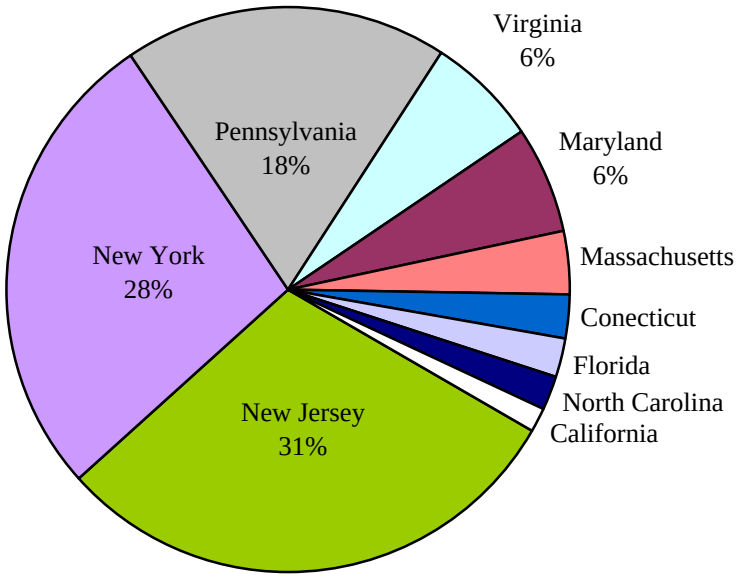
Figure 5: Origin DMA's[7] of visitors to the state of New Jersey[8]



[7] DMA names have been shortened for clarity.
[8] Global Insight. (2007). NJ Tourism Continues to Impress. Retrieved, April 5, 2007 from New Jersey Commerce, Economic Growth & Tourism Commission website: http://www.state.nj.us/travel/ppt/fy2006-04-tourism-ecom-impact.ppt.

Figure 6 shows the origins of overnight visitors to the state of New Jersey in 2006. Overnight visitation is driven by more feeder markets than just Philadelphia and New York City. A 2007 study by D.K. Shifflet and Associates Ltd.[9] shows the top five feeder states for New Jersey overnight visitation; these figures have remained stable for the past three years. New Jersey Residents account for 28% of this market with New York (25.2%) and Pennsylvania (17.2%) playing very important roles as well.

Figure 6: Overnight visitation[10]



The continued decreases in funding for tourism promotion within the state, coupled with the increasing threat from surrounding states and specific regions, means that the state of New Jersey must be diligent in examining the effectiveness of its tourism promotion. This survey serves as a benchmark for determining changes in the effectiveness of tourism promotion. Future years should look at changes from the prior year based on specific promotional efforts.

[9] D.K. Shifflet & Associates (2007). NJ FY2006p Visitor Profile Public Version. Retrieved April 5, 2007 from New Jersey Commerce, Economic Growth & Tourism Commission website: http://www.state.nj.us/travel/pdf/fy2006-visitor-profile-4-2-07.pdf.

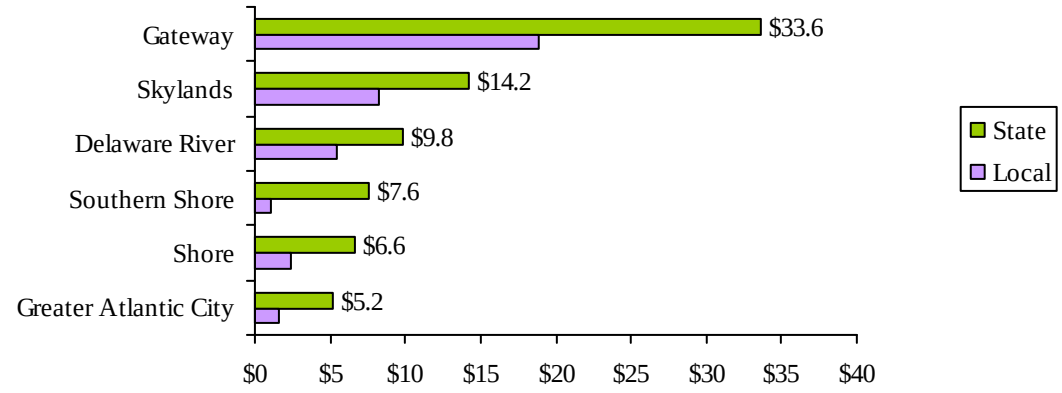
[10] Global Insight. (2007). NJ Tourism Continues to Impress. Retrieved, April 5, 2007 from New Jersey Commerce, Economic Growth & Tourism Commission website: http://www.state.nj.us/travel/ppt/fy2006-04-tourism-ecom-impact.ppt

Regional and Local Promotion Funding

A major change in the way the state's six Regional Tourism Councils are funded occurred in 2006. The allocation of monies from the hotel tax went from $50,000 to $30,000 in fiscal year 2006. That figure would then drop again to $15,000 in fiscal year 2007 and is expected to be phased out entirely by fiscal year 2008.

While the funding is being cut, the hotel tax revenue from which this funding is generated is quite significant. At 5%[11] for most municipalities[12], the state generated $77.1 million in hotel tax revenue. Most municipalities have enacted an additional 3% local hotel tax as well that, in 2006, generated $37.6 million. Figure 7 shows both the state fee and municipal tax for each of the six tourism regions. The Gateway region produced the largest percentage (43.7%) of state hotel occupancy tax revenue with $33.6 million Followed by the Skylands (18.4%, $14.2 million) and Delaware River (12.7%, $9.8 million).

Figure 7: 2006 state and local hotel tax revenue in millions of dollars[13, 14]



[11] New Jersey Division of Taxation. (2007). Hotel Motel State Occupancy Fee and Municipal Occupancy Tax. Retrieved February 9, 2007 from the New Jersey Division of Taxation website: http://www.state.nj.us/treasury/taxation/hotelfee.htm

[12] The municipalities of Atlantic City, Newark, Jersey City, Wildwood, North Wildwood and Wildwood Crest already had an existing hotel occupancy tax when the enabling state hotel tax legislation was first enacted. They have been allowed to continue their existing rates of municipal tax while contributing a lower amount to the State of NJ. State Occupancy Fee in Atlantic City, Newark and Jersey City is 1% and, in Wildwood, it is 3.15%.

[13] Source: http://www.state.nj.us/treasury/taxation/hotelfeeinfo.htm

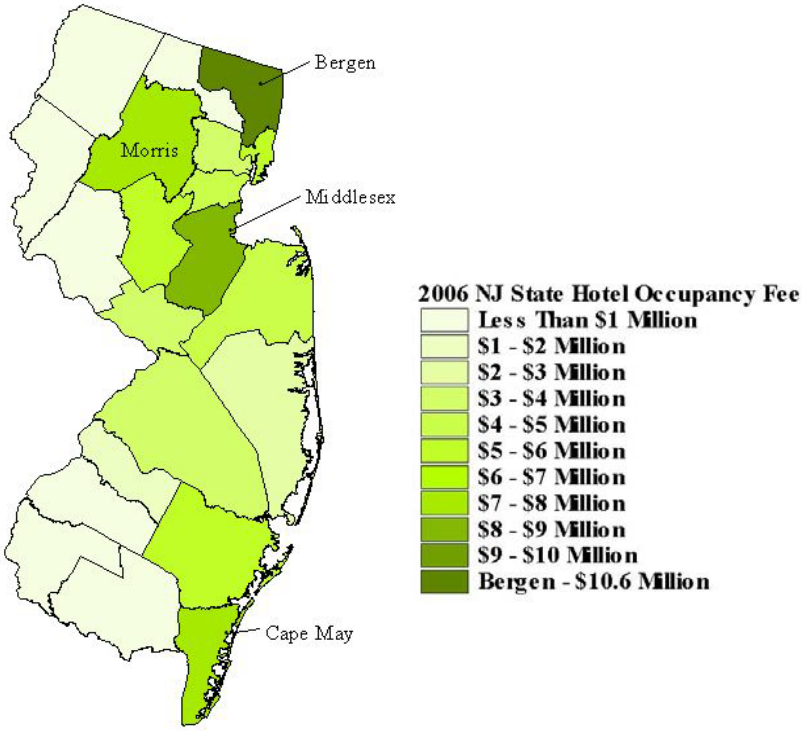
[14] The local hotel tax revenue figures do not include the additional hotel tax that is collected by the Atlantic City Convention & Visitors Authority, the Wildwood Convention and Visitors Authority and the Port Authority of New York and New Jersey and invested in tourism infrastructure, development and marketing.

This regional analysis of the state occupancy fee is somewhat misleading because, as mentioned in footnote 12, several municipalities do not collect the state occupancy fee at the 5% rate. This is particularly important when looking at the Greater Atlantic City Region's contribution to the state occupancy fee (6.7%, $5.2 million). The municipality of Atlantic City, which charges the lowest state occupancy fee rate at 1%, provides the state with the smallest contribution to the state occupancy fee revenue. The region, however, benefits from the largest portion of tourism expenditures (see Figure 2). At nearly $13 billion in 2006 Atlantic County (Greater Atlantic City Region) generated 36.8% of all tourism expenditures in the state of New Jersey[15].

[15] http://www.state.nj.us/travel/ppt/fy2006-04-tourism-ecom-impact.ppt

Indeed, examining the state occupancy fee at the county level gives a clearer picture of the main contributors to this revenue. Figure 8 shows the 2006 New Jersey State Hotel Occupancy Fee Receipts by county. Bergen County was the most significant contributor at 13.76% or $10.6 million. Middlesex County was the next largest at 10.7% $8.2 million followed by Morris County (10%, $7.7 million) and Cape May County (9.2%, $7.1 million). It is important to consider here that much of the hotel occupancy tax receipts are the result of business travel and not strict tourism related. This is perhaps a large reason why Bergen County was the largest contributor to these tax receipts.

Figure 8: 2006 New Jersey state hotel occupancy fee receipts



Methodology

The questionnaire was developed with the invaluable input of the NJ Center for Hospitality and Tourism Research's state-wide advisory board (see Appendix A: Special Thanks to our Statewide 2006 – 2007 Advisory Group). There help with regard to the formulation and revision of the survey is much appreciated as the project could not have been completed without this assistance.

The Annual Survey to Improve the Effectiveness of Tourism Promotion consists of a survey of adults in New Jersey, New York, Pennsylvania, Maryland, Connecticut, and Massachusetts. The data was collected by Zogby International who also assisted with this analysis. The target sample is 1,400 interviews with approximately 45 questions asked. Samples are randomly drawn from telephone CDs of national listed sample. Zogby International surveys employ sampling strategies in which selection probabilities are proportional to population size within area codes and exchanges.

Up to six calls are made to reach a sampled phone number. Cooperation rates are calculated using one of AAPOR's approved methodologies and are comparable to other professional public-opinion surveys conducted using similar sampling strategies. Weighting by region, age, race, and gender is used to adjust for non-response. Margin of error is +/- 2.7 percentage points. Margins of error are higher in sub-groups.

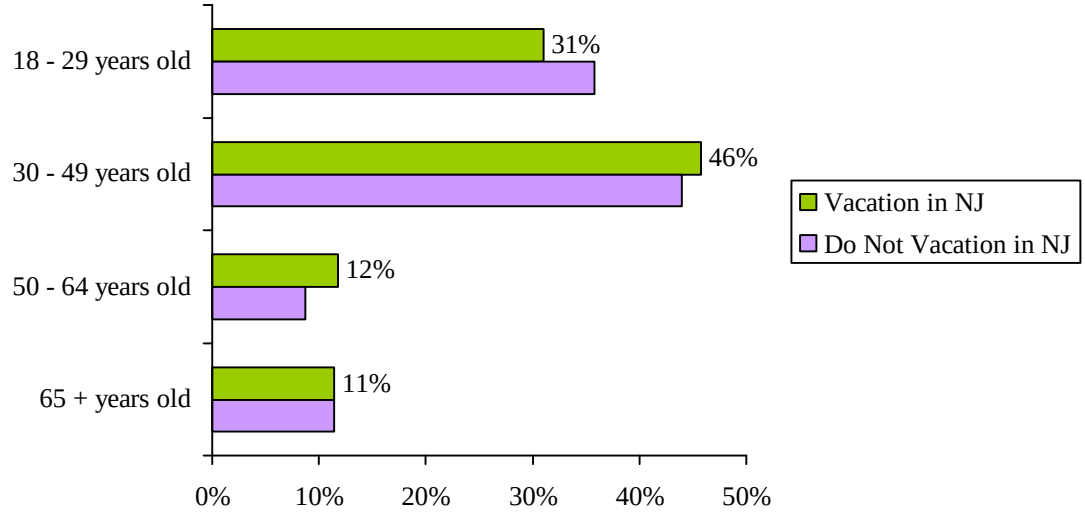
Zogby International's sampling and weighting procedures have also been validated through its political polling: more than 95% of the firm's polls have come within 1% of actual election-day outcomes.

Summary Statistics

The sample consisted of mainly individuals between the ages of 30 and 64 (62%). A majority of respondents had at least some college (59%) with nearly a third (32%) having graduated from college. A large majority were white (78%), nearly half were married (54%) and over a third earned more than $50,000 per year. The genders of those surveyed closely reflect that of the general population with nearly an equal split between men (48%) and women (52%).

Figure 9 shows the age of the respondents to the survey. The average age of the respondents to the survey was 47.2 years old. The average for just those responding that they had vacationed in New Jersey was higher at 48.9 years old. This is fairly close to the median age of 47 found by D.K. Shifflet and Associates ltd.[16]. Both figures reflect an average age higher than that of the US average (43) and older than those vacationers to New Jersey's competitive set (42). Compared with those not vacationing in New Jersey, New Jersey tourists are comprised of slightly more in the 30-49 age brackets and less in the 18-29 age groups.

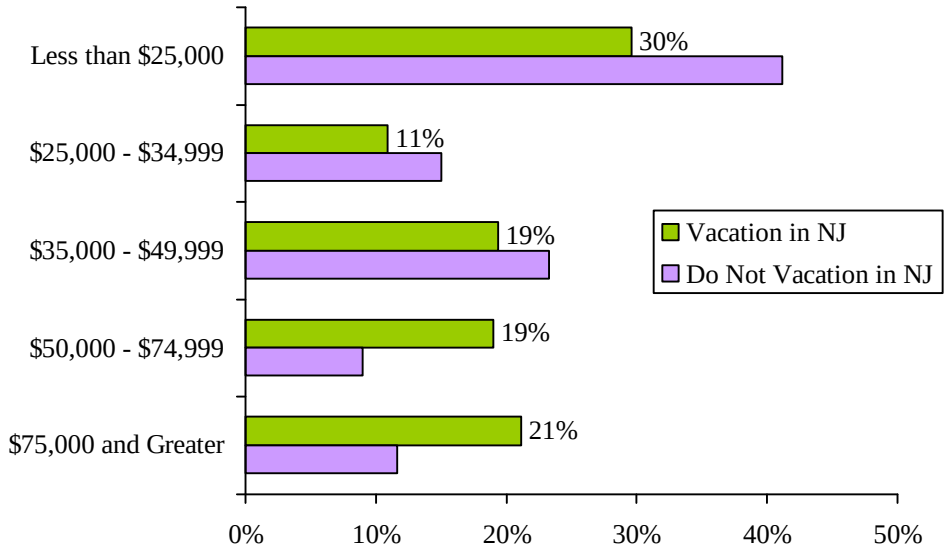
Figure 9: Age of respondents



[16] DK Shifflet & Associates 2007.

Figure 10 shows the average income of New Jersey residents that vacation in the state compared with those that do not. Compared with those that do not vacation in New Jersey, the vacationers to the state appear to be relatively more affluent. There is a much smaller percentage of individuals earning less than $25,000 annually for vacationers to New Jersey as well as larger proportions in the two highest income brackets. This particular chart should be utilized when examining promotional efforts geared at individuals with particular incomes. Changes in the relative proportion of say the highest income bracket would suggest success at targeting higher income visitors.

Figure 10: Average income of respondents



It is not surprising that a larger percentage of those vacationing in New Jersey are from more affluent households than those not vacationing in the state. What can not be necessarily discerned from the data is whether or not the high representation of those in the lowest income bracket simply represents younger adults that vacation with their families. Attempts at discerning this difference should be made in subsequent years.

The highest educational level attained for the respondents is represented in Figure 11. It is also not surprising that those vacationing in New Jersey are more educated. Income and education generally track closely with each other in the general population. Most vacationers to the state had at least some college education.

Figure 11: Education of respondents

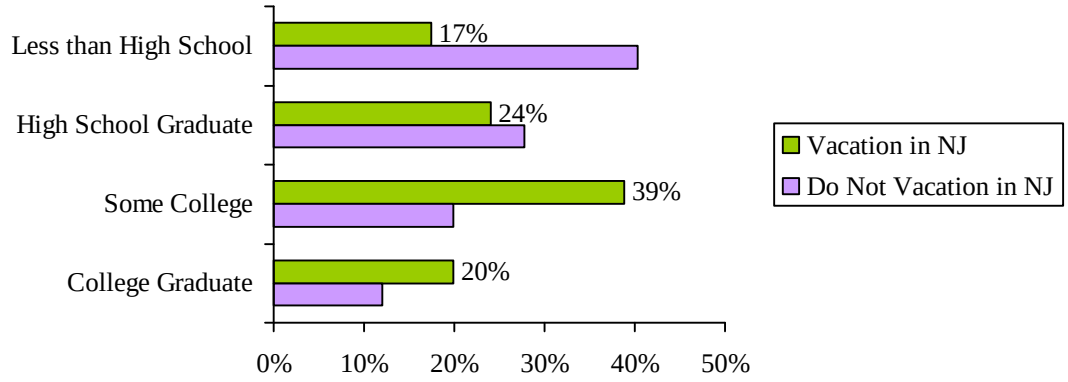


Table 1 provides a complete list of the summary statistics for the sampled population. The results are presented both in the aggregate as well as broken down by the state of origin for each of the respondents to the survey. Not all categories sum to 100% as the percentage of those not responding to any particular demographic characteristic have been left off of this chart for brevity's sake.

Men and women are equally likely to travel, however married respondents are 6% more likely to travel than are their single counterparts and 12% more likely than those who are divorced, widowed or separated. Respondents earning less than $15,000 per year are 20% less likely to travel annually. Those earning between $15,000 and $25,000 are slightly more likely to travel (83%) than are those earning from $25,000-$50,000 (78%). Those earning between $50,000-$75,000 (93%) and more than $75,000 (96%) are most likely to travel.

Table 1: Summary statistics

	Aggregate		New Jersey		New York		Pennsylvania		Maryland		Connecticut		Massachusetts	
Sample Characteristic	**n**	**%**	**n**	**%***	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**
Sample Size	140	100	699	100	298	100	304	100	50	100	28	100	21	100
18-29	272	20	139	20	58	20	59	20	10	20	2	20	1	5
30-49	549	41	278	40	116	40	118	40	20	40	11	40	6	29
50-64	289	21	138	20	58	20	68	23	11	23	6	23	7	33
65+	247	18	119	17	58	20	50	17	9	17	5	17	7	33
Less than high school	242	17	139	20	59	20	43	14	1	3	--	--	--	--
High school graduate	337	24	160	23	68	23	91	30	11	23	3	12	3	14
Some college	371	27	188	27	80	27	79	26	12	24	7	24	5	24
College graduate+	446	32	209	30	89	30	91	30	26	52	18	65	13	62
White	2	78	524	75	219	76	249	84	35	72	24	84	21	100
Hispanic	95	7	62	9	23	8	9	3	--	--	1	4	--	--
African American	169	12	90	13	37	13	30	10	11	23	1	5	--	--
Asian/Pacific	14	1	7	1	3	1	3	1	1	2	0	--	--	--
Other/mixed	27	2	0	0	8	3	6	2	2	4	1	4	--	--
Married	749	54	388	56	132	45	173	57	21	42	18	64	17	91
Single, never married	371	27	166	24	100	34	81	29	16	32	8	27	4	19
Divorced/widowed/separated	249	18	130	19	61	21	40	13	11	21	2	9	17	81
Civil union/ partnerships	26	2	12	2	2	1	9	3	3	6	--	--	--	--
Less than $25,000	329	30	164	28	58	28	90	37	11	16	3	22	3	23
$25,000-$34,999	150	14	68	12	33	16	41	17	4	9	2	11	2	15
$35,000-$49,999	232	21	120	21	53	25	46	19	4	9	3	19	6	46
$50,000-$74,999	157	14	95	16	27	13	26	11	6	14	4	23	1	7
$75,000-+	234	21	132	23	40	19	39	16	17	36	4	26	1	7
Male	672	48	337	48	143	48	146	48	24	48	13	48	9	43
Female	728	52	362	52	155	52	158	52	26	52	15	52	12	58

Results

The results section attempts to show respondents answers by both their state of origin as well as by whether or not they have vacationed in the state of New Jersey. The section is organized by the questions that were asked of the respondents (see *Appendix D: Survey Instrument*). Tables are provided which show how respondents differ by their state of origin. On crucial questions, maps have been provided to highlight the differences between the respondents by their state of origin.

Question 1. Do you take a trip away from home at least once a year? This might include day trips, long weekends, visits with friends and family or business?

Table 2 shows the percentage of respondents by state that take trips way from their home annually. Large majorities of respondents in every state take trips away from home at least once a year. Residents in every state polled agree that they take a trip away from home at least once a year; fewer than 20% in any state do not take such trips.

Table 2: Trips taken away from home by origin

	Overall	**NJ**	**NY**	**PA**	**MD**	**CT**	**MA**
Yes	81%	80%	80%	84%	85%	82%	91%
No	19%	20%	20%	17%	15%	18%	10%

Figure 12 shows the percentage of respondents who take annual trips by both those that choose New Jersey for their vacation compared with those that do not. Respondents who had vacationed in New Jersey had a much greater incidence of planning annual trips. This is very likely the influence of the family vacationer that visits the shore on an annual basis. Similar findings with regard to how far in advance the vacationer reserves would suggest this same analysis. Still, over 70% of those that do not vacation in New Jersey take annual trips elsewhere. This suggests that tapping into these consumers could be well worth while.

Figure 12: New Jersey vacationers compared with annual vacationers

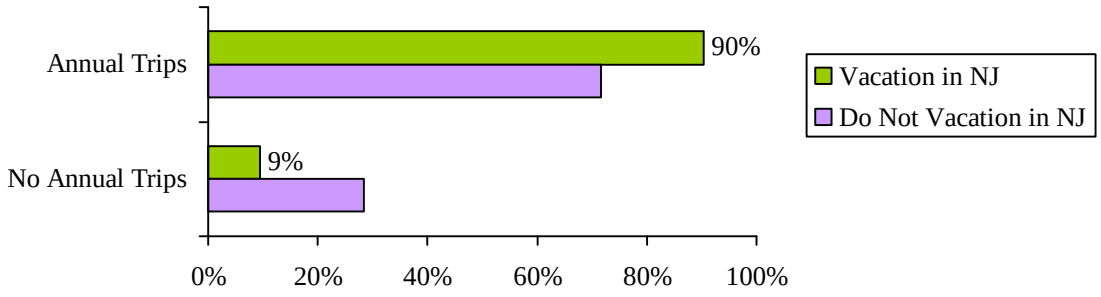
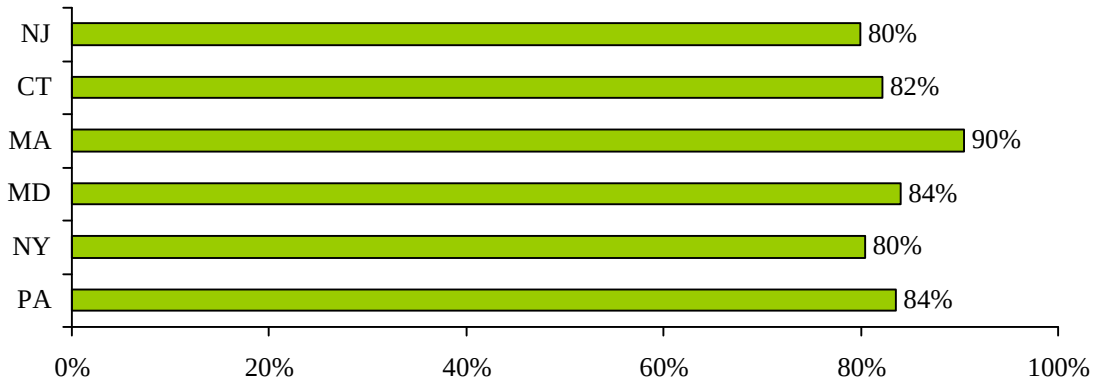


Figure 13 shows the respondents who take annual vacations by their state of origin. Vacations are most common for residents of Massachusetts at 90%[17]. The remaining respondents reported taking annual trips at the rate of 80% to 84%.

Figure 13: Respondents who take annual vacations by state



[17] Note the sample for Massachusetts is relative small and thus this figure might be inflated.

Question 2. When you go on a trip away from home, how do you get there? (Choose the method you use most often)

The majority of respondents in every state travel by car (see Figure 14). Those who do not travel by car do not primarily travel by bus, train or charter. Likely those reporting some "other" means of transportation are traveling by air. Future surveys should include air travel as an option to have a clearer picture of how these individuals are traveling to New Jersey. Regardless, the number of individuals traveling to New Jersey by car can not be understated. This has very important consequences with regard to promotion in the state. Outdoor advertising (billboards) should be able to have a major impact on travel and tourism to and within the state. Directional signage should also be seen as a priority given the number of individuals that would be looking for information while on the states highways and roads.

Figure 14: Mode of transportation

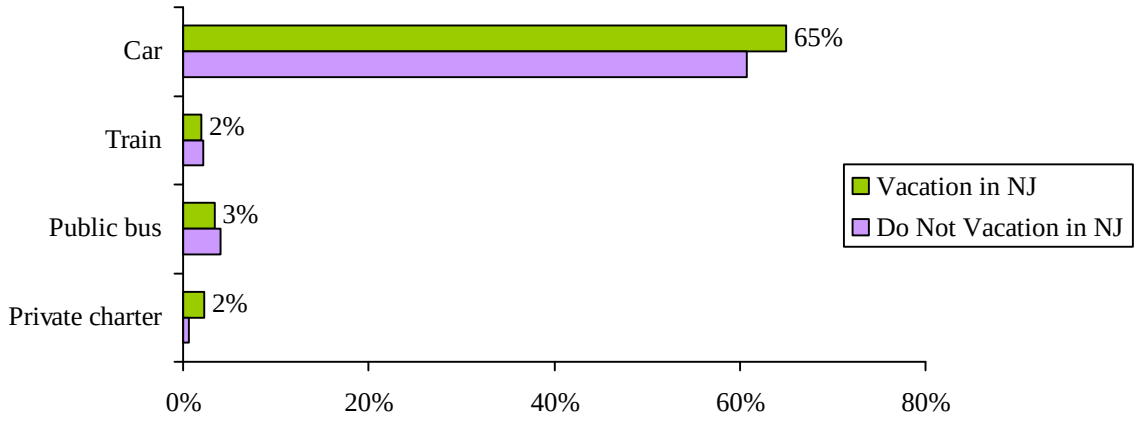


Table 3 shows the mode of transportation utilized by visitors to New Jersey. The majority of respondents from each state report utilizing a car as their mode of transportation to New Jersey. That "other" is recorded as the second most likely means of transportation from all state except New Jersey suggests more detail on this question will be needed in future surveys. One could speculate that the customer does not appreciate that a "charter" is a bus (either private or casino). It is notable that nearly one quarter of the respondents from Massachusetts traveled to New Jersey on a casino charter.

Table 3: Mode of transportation

Mode of Transportation	Overall	NJ	NY	PA	MD	CT	MA
Car	63%	56%	61%	80%	70%	62%	67%
Other	27%	34%	25%	13%	25%	30%	--
Public bus	4%	3%	7%	1%	2%	2%	--
Train	2%	2%	4%	--	--	2%	5%
Private charter	2%	2%	1%	1%	1%	--	--
I don't take trips	2%	2%	--	4%	2%	4%	5%
Casino charter	--	--	1%	1%	--	--	24%
Not sure	--	--	--	--	--	--	---

Question 3. When you go on a trip away from home what type of accommodations do you most frequently use?

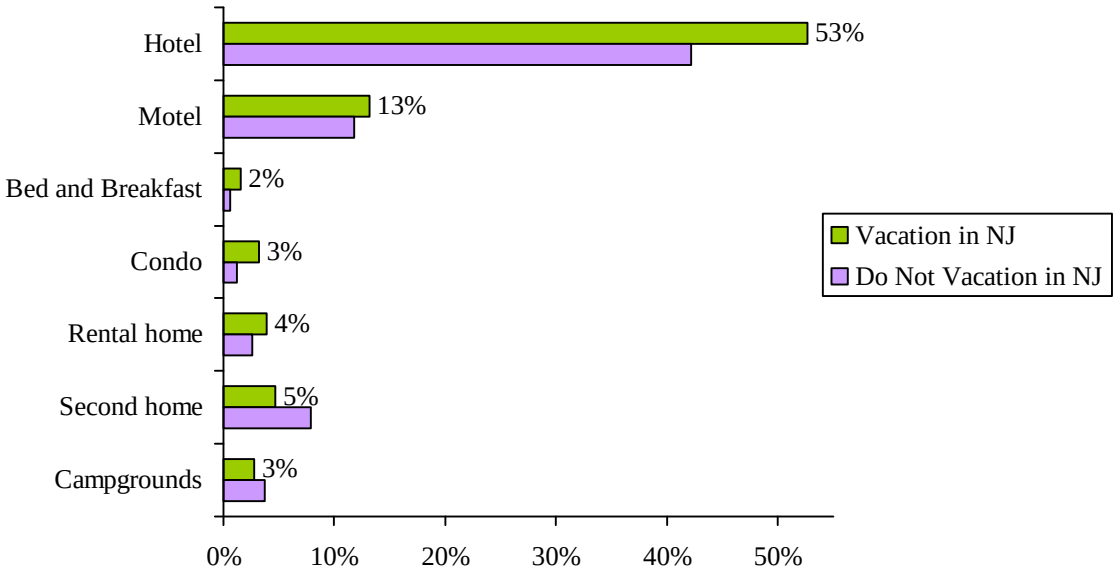
The majority of vacationers use hotels when they travel, with "other" being the next most often selected category in every state. Table 4 shows the typical accommodations our respondents utilized when vacationing. Motels are third most likely to be popular, with respondents in Pennsylvania slightly more likely than those in other states to use them.

Table 4: Accomodations

	Overall	NJ	NY	PA	MD	CT	MA
Hotel	48%	49%	47%	44%	52%	54%	52%
Motel	13%	12%	11%	17%	--	8%	--
Bed and Breakfast	1%	1%	1%	1%	--	--	--
Condo	2%	2%	3%	3%	5%	--	5%
Rental home	3%	4%	4%	4%	5%	18%	5%
Second home	6%	8%	3%	5%	10%	--	10%
Campgrounds	3%	2%	4%	3%	10%	7%	10%
Other	19%	18%	17%	23%	14%	14%	14%
Not sure	--	--	--	--	--	--	--
I don't take trips	2%	3%	--	--	6%	4%	5%
Day trips only (No accommodations)	3%	1%	4%	6%	--	2%	--

Figure 15 shows the lodging choices of those New Jersey tourists compared with those that do not vacation in the state. Those vacationing in New Jersey are 10% more likely to utilize hotel accommodations (52%) compared with those that do not vacation in the state. Interestingly, one might expect there to be a larger percentage of individual who vacation in New Jersey to utilize a second home. Vacation homes have been a long-standing tradition for vacationers to New Jersey. This study revealed a larger percentage of respondents that do not vacation in New Jersey utilizing second homes as their choice of lodging. This might be a reflection of the ever-increasing cost of vacation homes in New Jersey. Still, vacation homes are the third most utilized source of lodging for vacationers in the state of New Jersey.

Figure 15: Lodging choices



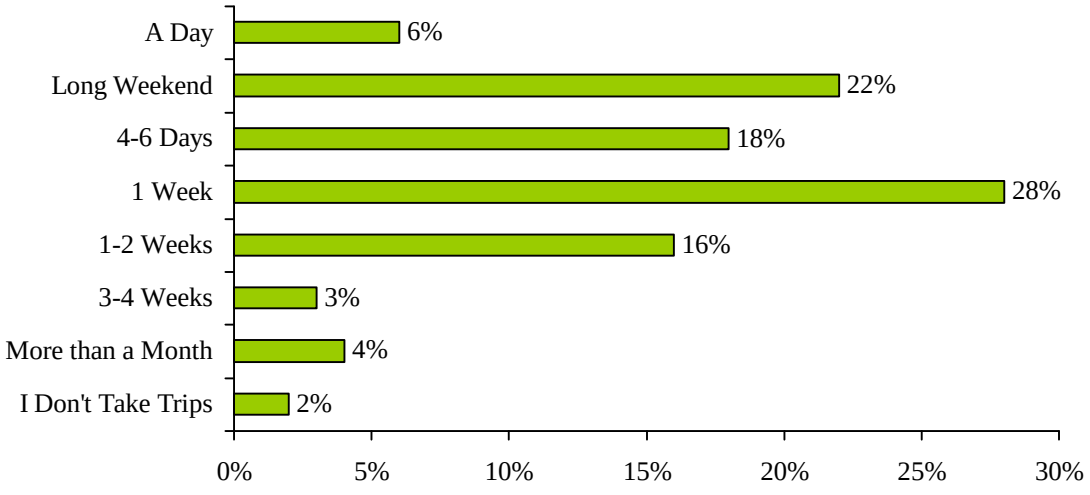
Question 4. For how long do you usually go on a trip away from home?

Respondents generally travel for a week, although New Yorkers are more likely to travel for a long weekend (see Table 5 and Figure 16). The next most popular length of trip was between 4 and 6 days. Respondents are less likely to travel for 3-4 weeks. It is important to note that while in Connecticut and Massachusetts it appears as though many more respondents travel for 1-2 weeks, those samples are quite small and not necessarily representative of the state as a whole.

Table 5: Trip length

Trip Length	Overall	NJ	NY	PA	MD	CT	MA
1 week	28%	30%	20%	30%	33%	21%	29%
Long weekend	22%	20%	28%	22%	26%	17%	19%
4-6 days	18%	15%	17%	25%	11%	17%	14%
1-2 weeks	16%	18%	19%	9%	6%	30%	33%
A day	6%	6%	6%	5%	4%	7%	--
More than a month	4%	6%	1%	1%	5%	--	--
3-4 weeks	3%	1%	%8	4%	8%	4%	--
I don't take trips	2%	2%	--	4%	7%	4%	5%

Figure 16: Overall respondent's trip length



The New York and New Jersey markets seem quite agreeable to long weekends, with New Yorkers more likely to enjoy a brief holiday relative to the longer holidays of

New Jersey residents. Pennsylvania residents also appear to take longer vacations relative to New York residents. A week of vacation is another strong trend well worth keeping in mind in terms of marketing and attracting vacationers.

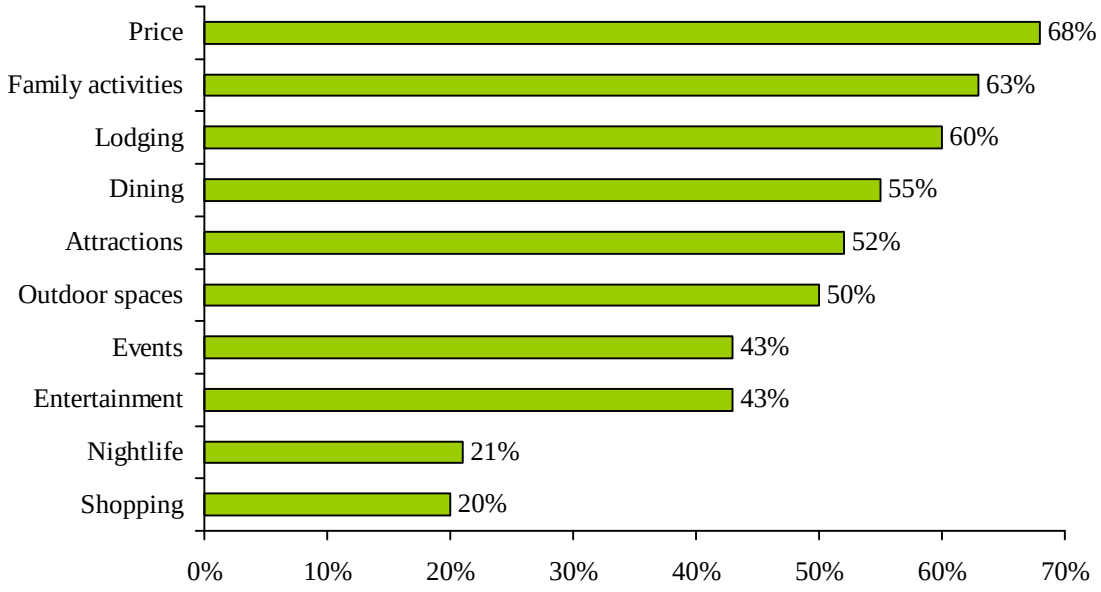
Questions 5 – 14. For the following words or phrases, on a scale of 1 to 5, with 1 being not at all important and 5 being most important, please tell me how important each is to you when you are making plans to take a trip away from home such as a day trip, long weekend, visit with friends and family or business.

Table 6 and Figure 17 show the activities rated high in importance by our respondents. Overall, price, family activities, lodging and dining are the top concerns when visitors make plans for a trip away from home. Shopping and nightlife get the least attention. Events and entertainment are important to 43% apiece, with outdoor spaces and attractions important to just about half. Dining is important to 55% and lodging to 60%. Sixty-three percent consider family activities very important and price is the most important overall to 68%. Price is, in fact, most important to more than half of those aged 18-49.

Table 6: Activities rated high in importance

High Importance (combining 4 & 5)	Overall	NJ	NY	PA	MD	CT	MA
Price	68%	73%	61%	68%	61%	39%	62%
Family activities	63%	63%	61%	65%	56%	53%	48%
Lodging	60%	58%	59%	68%	61%	66%	76%
Dining	55%	30%	42%	59%	56%	53%	52%
Attractions	52%	51%	52%	50%	51%	49%	43%
Outdoor spaces	50%	34%	44%	47%	32%	55%	48%
Events	43%	43%	49%	39%	43%	28%	38%
Entertainment	43%	45%	46%	35%	33%	26%	24%
Nightlife	21%	8%	24%	22%	21%	32%	24%
Shopping	20%	24%	17%	22%	24%	24%	10%

Figure 17: Overall activities rated high in importance



Question 15. Generally speaking where do you get most of your information about the places you travel to when you leave home?

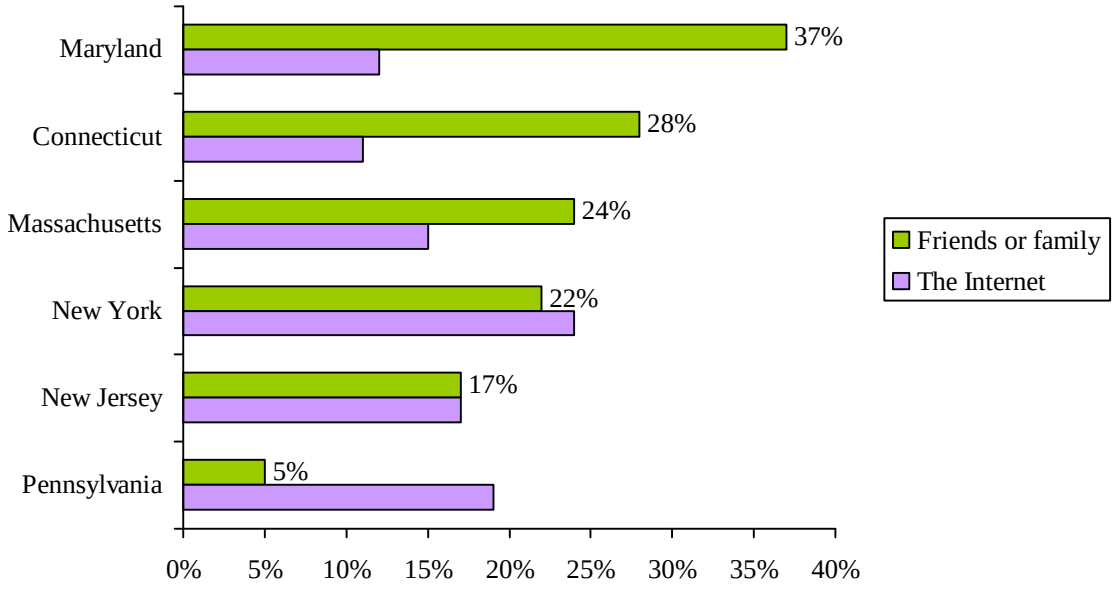
Table 7 and Figure 18 depict the information sources visitors used most when planning vacations. The internet and friends or family are the two most utilized sources of information for travelers. These sources are likely closely related with vacationers' getting information from their friends or family and seeking out even richer information through the internet. It should be noted that achieving excellence in customer service in New Jersey can generate word of mouth advertising that can be capitalized on by providing prospective visitors with quality information through the internet.

Table 7: Information sources, most utilized

Information Source	Overall	NJ	NY	PA	MD	CT	MA
The Internet	39%	36%	40%	44%	46%	34%	43%
Friends or family	30%	33%	31%	24%	28%	24%	33%
*Other	6%	7%	5%	4%	5%	5%	14%
News/ Magazine story	5%	4%	6%	5%	7%	4%	--
Pamphlet/brochure	5%	5%	4%	6%	3%	12%	--
Television	4%	5%	5%	3%	3%	--	5%
Travel planning guide	4%	3%	4%	5%	3%	4%	--
Advertisement	3%	3%	1%	5%	--	5%	--
Tourism map of attractions	1%	2%	---	2%	--	--	--
Information Center/Travel Plaza	1%	1%	1%	2%	--	4%	--
Not sure	1%	1%	3%	--	--	--	--
I don't take trips	1%	1%	--	1%	6%	4%	--
Postcard or mailer	--	--	--	1%	--	4%	--
Coupon for area attraction	--	--	--	--	--	--	--
Billboard	--	--	--	--	--	--	--

***Other:** CT - Word of mouth (1); MA - Same place I've visited before (2), Books (1)

Figure 18: Top two sources for information



Question 16. Generally speaking where do you get the next most information about the places you travel to when you leave home?

Table 8 shows the next most utilized source of information in planning vacations. The Internet and family are still the big winners here, although television and news/magazine stories move up somewhat. Likely respondents are finding general information on television and in news/magazine stories that they follow up on with richer information sources (internet and friends and family).

Table 8: Information sources, second most utilized

Information Source	Overall	NJ	NY	PA	MD	CT	MA
Friends or family	21%	17%	28%	24%	37%	22%	5%
The Internet	16%	17%	11%	15%	12%	24%	19%
Television	12%	10%	17%	11%	4%	14%	5%
News/ Magazine story	12%	15%	10%	12%	6%	6%	10%
Pamphlet/brochure	8%	7%	7%	11%	12%	11%	10%
Not sure	7%	9%	6%	4%	9%	9%	24%
Travel planning guide	6%	6%	4%	6%	3%	4%	10%
*Other	6%	7%	6%	3%	8%	2%	10%
Advertisement	5%	5%	6%	4%	--	6%	5%
Information Center/Travel Plaza	5%	6%	1%	6%	--	2%	5%
Tourism map of attractions	2%	1%	1%	3%	8%	--	--
Coupon for area attraction	1%	--	1%	1%	--	--	--
Postcard or mailer	--	--	--	1%	2%	2%	--
Billboard	--	--	--	--	--	--	--
I don't take trips	--	--	--	--	--	--	--

***Other:** CT: Senior center (1); MA: AAA, motor club; same place I've visited before (1 each)

Question 17. Generally speaking what is your third most important source of information about the places you travel to when you leave home?

Television and news/magazine stories move up again here, as do pamphlets and brochures. Advertisements are also quite significant as a third source of information. Still, the influence of friends and family and the internet can not be understated.

Table 9: Information sources, third most utilized

Information Source	Overall	NJ	NY	PA	MD	CT	MA
Television	14%	14%	13%	17%	6%	10%	13%
Friends or family	13%	13%	10%	17%	11%	15%	31%
News/ Magazine story	12%	14%	13%	11%	4%	4%	6%
Pamphlet/brochure	10%	10%	9%	9%	26%	11%	--
*Other	9%	9%	12%	8%	10%	8%	13%
Advertisement	8%	9%	6%	9%	6%	12%	--
Not sure	8%	7%	8%	8%	10%	--	6%
Travel planning guide	7%	7%	6%	7%	5%	15%	6%
The Internet	7%	6%	11%	6%	6%	6%	--
Information Center/Travel Plaza	6%	6%	8%	3%	10%	--	13%
Tourism map of attractions	2%	2%	1%	5%	4%	2%	6%
Postcard or mailer	1%	1%	1%	1%	--	--	--
Coupon for area attraction	1%	1%	1%	--	3%	--	5%
Billboard	1%	2%	2%	--	--	--	--
I don't take trips	--	--	--	--	--	--	--

***Other:** CT: Past Experience (1), Friends or Family (1); MA: Same place I've visited before; Phone ahead for information (1 each)

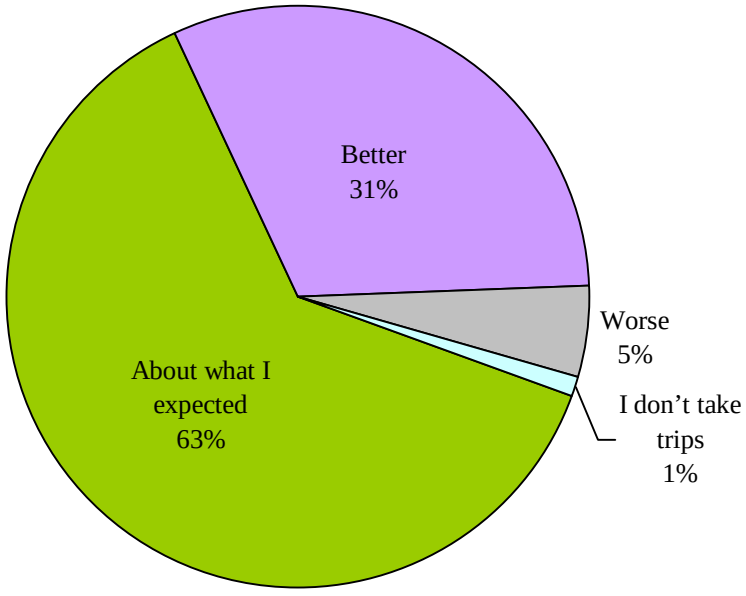
Question 18. Was your last trip away from home better than you expected, worse than you expected or about what you expected?

Table 10 and Figure 19 show how the expectations of visitors to New Jersey were met. Nearly all respondents agree that the last trip they took was about what they expected it to be. Thirty-one percent felt the trip was better than they had anticipated. It is vitally important that the expectations are at least met as satisfaction, and subsequent return visits, are inextricably linked to this important measure. It appears New Jersey is doing just this.

Table 10: Expectations

Satisfaction relative to expectation	Overall	NJ	NY	PA	MD	CT	MA
About what I expected	62%	62%	66%	59%	61%	54%	38%
Better	31%	32%	27%	32%	28%	42%	51%
Worse	5%	4%	7%	7%	6%	--	--
I don't take trips	1%	1%	--	1%	--	4%	5%
Not sure	--	--	--	1%	6%	--	--

Figure 19: Expectations



Question 19. (Asked only of those who said their last trip was better than expected.) In what way was your trip away from home better than you expected?

Table 11 shows respondents answers to why New Jersey exceeded their expectations as a destination. Nineteen percent of respondents who agree that their last trip was better than expected, say it was because they simply enjoyed it. Sixteen percent enjoyed great accommodations. Fourteen percent had great weather, and 11% were able to do more than they expected.

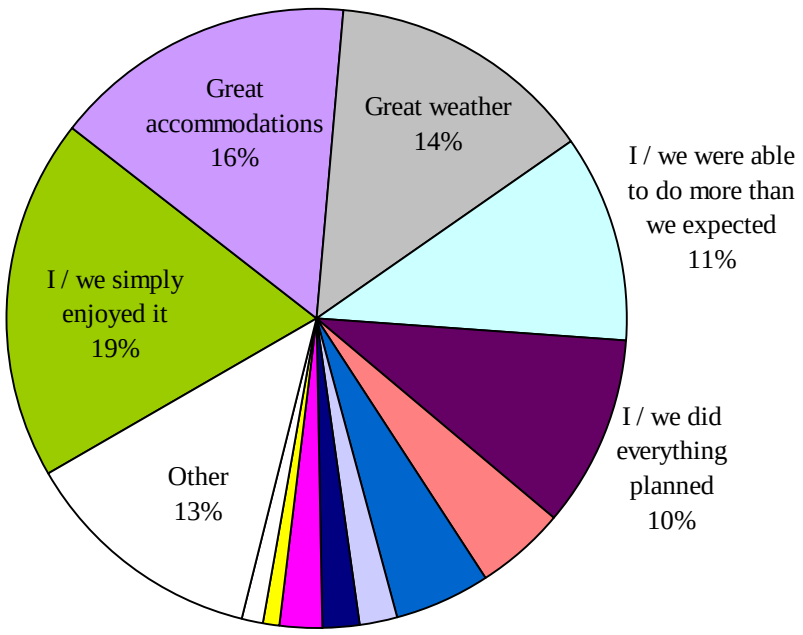
Table 11: Exceeding expectations

Why Expectation was Exceeded	Overall	NJ	NY	PA	MD	CT	MA
I / we simply enjoyed it	19%	15%	38%	15%	8%	39%	--
Great accommodations	16%	16%	15%	16%	15%	8%	33%
Great weather	14%	12%	9%	22%	5%	23%	17%
*Other	13%	17%	10%	8%	11%	13%	5%
I / we were able to do more than we expected	11%	9%	7%	15%	26%	5%	14%
I / we did everything planned	10%	15%	4%	1%	19%	5%	5%
My children had an unexpectedly good time	5%	5%	3%	9%	--	--	5%
Diversity of attractions or activities	5%	4%	7%	9%	--	8%	--
No, or small, crowds	2%	1%	4%	2%	5%	--	--
Easy to find my way around	2%	2%	--	2%		--	--
Quality of historical activities	2%	1%	2%	1%	--	--	--
Choice of restaurants	1%	1%	--	1%	--	--	--
Attitude of employees	1%	2%	--	1%	--	--	--
Not sure	--	--	--	--	4%	--	--
I don't take trips	--	--	--	--	--	--	--

***Other:** CT: Great Weather (1)

Figure 20 shows the positive aspects of New Jersey as a vacation destination that lead individuals to report that their expectations were exceeded. It is interesting to note that the "diversity of attractions" does not rate higher here. This possibly suggests that visitors don't differentiate either between attractions within New Jersey or between New Jersey attractions and those of competing destinations.

Figure 20: Exceeding expectations



Question 20. (Asked only of those who said their last trip was worse than expected.) In what way was your trip away from home worse than you expected?

Table 12 details reasons why respondent's expectations were (or were not) met in New Jersey. Respondents who had a worse than expected experience on their last vacation chalked it up to a variety of reasons but listed "other" most often. The next most often chosen response is bad weather. Accommodations were to blame 9% of the time.

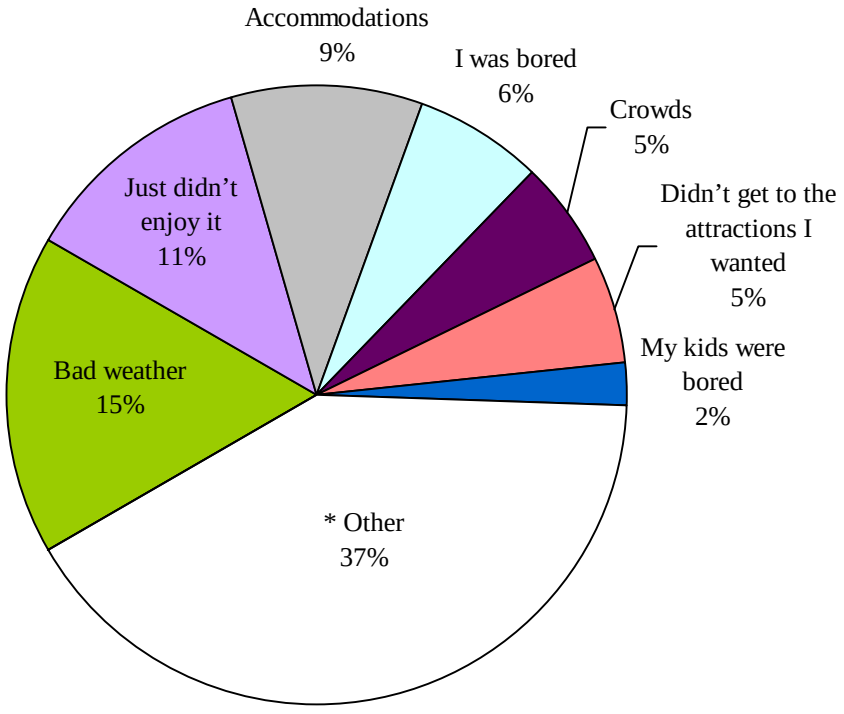
Table 12: Not meeting expectations

Why Expectations Weren't Met	Overall	NJ	NY	PA	MD	CT	MA
*Other[18]	37%	59%	23%	18%	59%	--	--
Bad weather	15%	13%	26%	3%	41%	--	--
Just didn't enjoy it	11%	6%	33%	--	--	--	--
Accommodations	9%	8%	4%	15%	--	--	--
I was bored	6%	2%	2%	51%	--	--	--
Crowds	5%	7%	--	9%	--	--	--
Didn't get to the attractions I wanted	5%	2%	12%	3%	--	--	--
My kids were bored	2%	4%	--	2%	--	--	--
Hard to find my way around	--	--	--	--	--	--	--
Not sure	--	--	--	--	--	--	--
I don't take trips	--	--	--	--	--	--	--

[18] Further details on what "other" reasons for expectations not being are detailed in Table 24 through Table 28.

Figure 21 shows these reasons why New Jersey did not meet expectations in graphic form. The top four reasons why New Jersey did not met the expectations of the visitor are highlighted in the figure.

Figure 21: Not meeting expectations



Question 21. When do you usually make your plans for a trip away from home? This might include day trips, long weekends, visits with friends, and family or business?

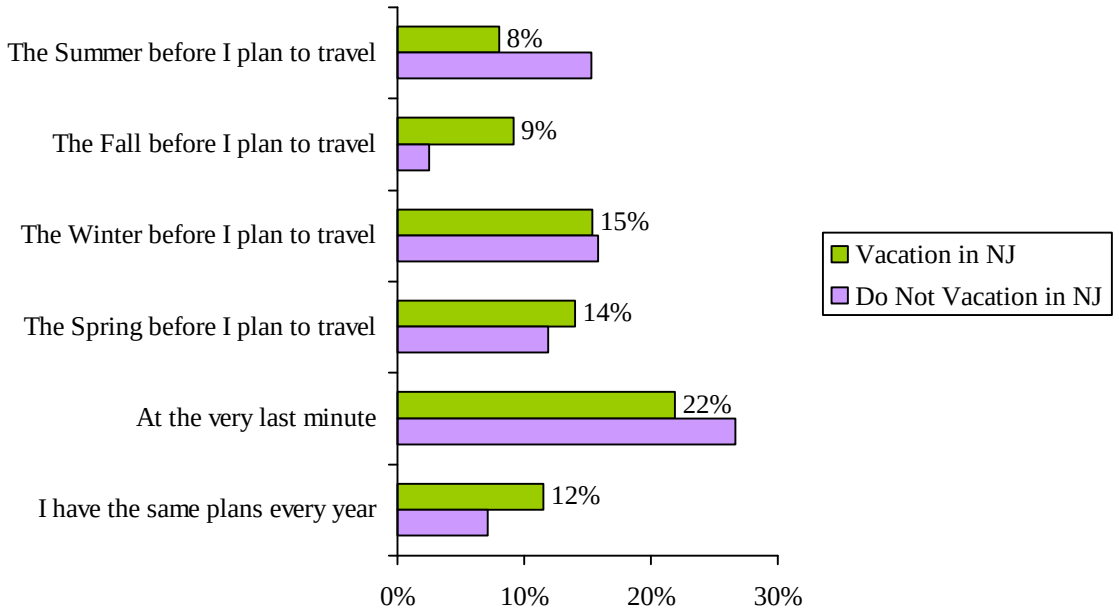
Overall, respondents tend to be winter planners, with 33% of them making plans right before they leave town as seen in Table 13. About a quarter plans at the very last minute and 17% do their planning in the fall. Thirteen percent plan in the spring and 11% make plans in the summer. While other seasons are kind of all over the map, a full third are making plans in the winter before they go away.

Table 13: Trip planning

When Trip Planned	Overall	NJ	NY	PA	MD	CT	MA
The Summer before I plan to travel	11%	12%	9%	13%	12%	6%	5%
The Fall before I plan to travel	17%	9%	2%	3%	4%	8%	19%
The Winter before I plan to travel	33%	18%	11%	14%	8%	26%	14%
The Spring before I plan to travel	13%	11%	11%	19%	13%	9%	19%
At the very last minute	24%	23%	30%	21%	14%	33%	--
I have the same plans every year	9%	11%	8%	7%	13%	9%	14%
Other	18%	13%	27%	20%	32%	5%	19%
Not sure	1%	2%	1%	1%	--	--	--
I don't take trips	1%	2%	--	1%	6%	4%	--

Approximately one fourth of all respondents do not plan their trips to New Jersey in advance. In examining just those that vacation in New Jersey, there appears to be a greater propensity of individuals to plan their travel the fall before they travel compared with those that do not vacation in New Jersey (see Figure 22). Likely the high occupancy rates experienced in the summertime at the shore lead to this earlier planning on the part of New Jersey vacationers. There are implications for this if New Jersey is to attempt to open up new markets through promotional efforts. Conduction advertising campaigns far enough in advance that availability is not a concern for potential travelers must be kept in mind.

Figure 22: Trip planning



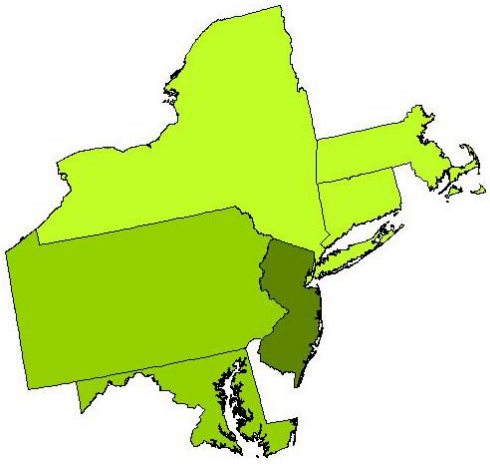
Question 22. (Not asked in New Jersey.) Have you ever visited the state of New Jersey?

Table 14 details whether individuals have ever visited the state of New Jersey. Overall, three quarters of respondents had visited the state of New Jersey. A quarter percent had not. Majorities in every state had visited New Jersey at some time. The incidence of visitation is highest for Maryland residents and lowest for Massachusetts residents. While Maryland only accounts for 5.8% of overnight visitation, it might be the case that the population here is much more inclined to visit the state. If indeed the rate of visitation is much higher in Maryland, the proportion of reminder promotions should likely be higher as well. Conversely, residents from Massachusetts likely need more information about the destination rather than the reminder promotions that work better after a visit has occurred.

Table 14: Have you ever visited the state of New Jersey?

	Overall	NY	PA	MD	CT	MA
Yes	76%	74%	77%	86%	73%	71%
No	24%	26%	23%	14%	27%	29%
Not sure	--	--		--	--	--

Figure 23: Have you ever visited the state of New Jersey?



State	Visited NJ
New Jersey	100%
Maryland	86%
Pennsylvania	77%
New York	74%
Connecticut	73%
Massachusetts	71%

Question 23. Have you ever vacationed in New Jersey?

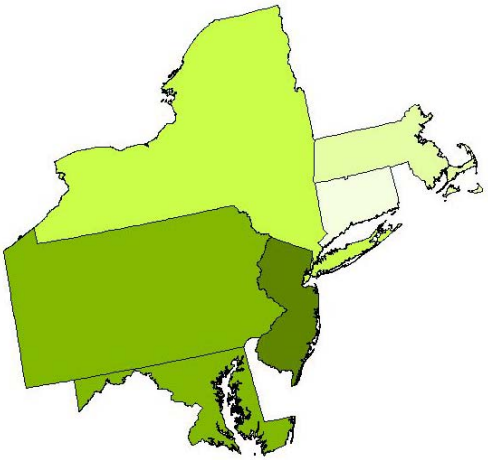
Table 15 shows the results of whether respondents had ever vacationed in New Jersey (see also Figure 24). Overall, about half had vacationed in New Jersey, most respondents in New Jersey had, and most in Pennsylvania and Maryland had. It appears as though majorities of respondents from states further away had not vacationed there, although those samples are so small it is difficult to make a determination.

Table 15: Have you ever vacationed in the state of New Jersey?

Vacationed in NJ	Overall	NJ	NY	PA	MD	CT	MA
Yes	53%	63%	35%	52%	53%	15%	24%
No	46%	36%	64%	47%	46%	80%	71%
Not sure	--	--	--	--	1%	--	--
I don't take vacations	1%	1%	1%	--	--	4%	5%

A greater percentage of respondents from Maryland and Pennsylvania indicated they had vacationed previously in the state of New Jersey. Residents of both Maryland and Pennsylvania also were more likely to have previously lived in New Jersey (see Figure 24 below). Taken together, these results suggest previous and current social ties in the state might help draw tourists to visit. The visiting friends and relatives segment is very important to New Jersey.

Figure 24: Have you ever vacationed in New Jersey?



State	Vacationed in NJ
New Jersey	63%
Maryland	53%
Pennsylvania	52%
New York	35%
Massachusetts	24%
Connecticut	15%

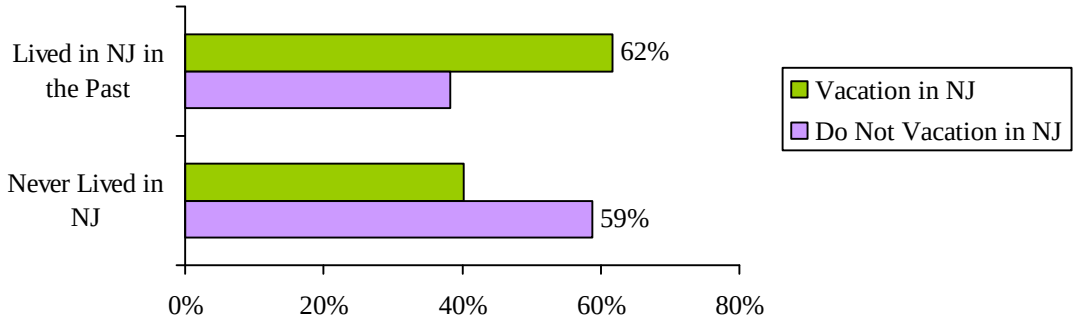
Question 24. (Not asked in New Jersey.) Do you now, or have you ever, lived in New Jersey?

Most current out-of-state residents have not lived in New Jersey, although the incidence of former New Jersey residence appears to be higher in Maryland and Pennsylvania (see Table 16 and Figure 25). Those that have lived in New Jersey however have a much greater incidence of vacationing in New Jersey. The chart below shows that, of those that lived in New Jersey in the past, 61% of them vacation in New Jersey. For those that have never lived in New Jersey, the reverse is true with over 58% of these individuals stating they do not vacation in New Jersey. Current and former ties to the state highlight the importance of the "Visiting Friends and Relatives" segment to New Jersey tourism.

Table 16: Previous New Jersey residents

Previous NJ Resident	Overall	NY	PA	MD	CT	MA
Yes	12%	6%	16%	17%	13%	10%
No	88%	94%	84%	83%	87%	91%
Not sure	--	--		--	--	--

Figure 25: Have you ever lived in New Jersey?



Questions 25 – 27. How often do you visit New Jersey, or areas in New Jersey if you are a resident, for the following purposes?[19]

Overall, 20% visit New Jersey for leisure less than once a year, and 20% once a year. Twenty-eight percent visit 2-10 times a year for leisure. Table 17 shows the full results for those stating they visited New Jersey primarily for leisure. Also of particular note are those individuals from Maryland, Connecticut and Massachusetts that reported never visiting New Jersey for leisure in relatively high amounts. This is also show in Figure 26 below.

Table 17: Visit New Jersey for leisure

Frequency	Overall	NJ	NY	PA	MD	CT	MA
Less than once a year	20%	12%	27%	24%	43%	19%	40%
Once a year	20%	20%	19%	22%	13%	9%	6%
2-10 times per year	28%	40%	18%	21%	11%	--	13%
Monthly	7%	10%	8%	2%	6%	--	--
Weekly	8%	11%	9%	2%	--	--	--
None	14%	4%	14%	24%	25%	61%	33%
Not Sure	2%	1%	1%	3%		9%	6%

[19] Questions 25 through 27 were asked only of those who have visited or vacationed in New Jersey.

Figure 26: Visit New Jersey for leisure

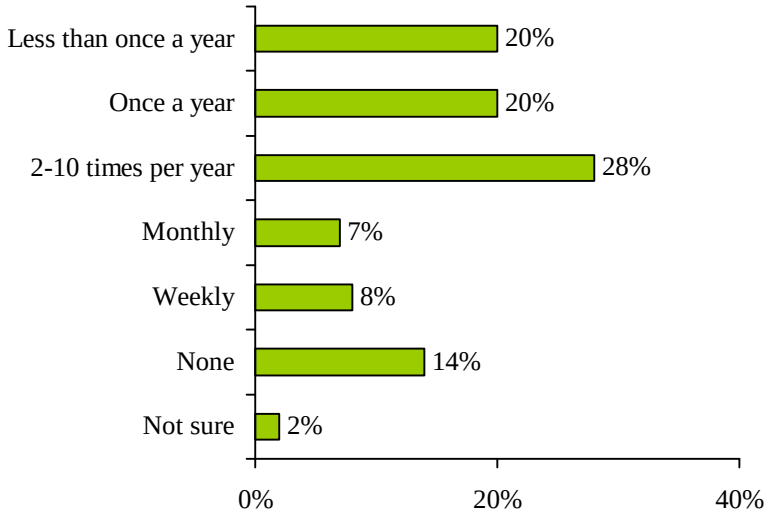


Table 18 shows the percentage of respondents visiting New Jersey to see friends. Twenty-three percent visit their friends in New Jersey 2-10 times per year. Just 10% visit once a year and 12% visit less than once a year. Thirteen percent visit friends there weekly. Altogether, nearly two-thirds of those visiting New Jersey for friends do so more than twice per year. This information is also presented graphically in Figure 27.

Table 18: Visit New Jersey for friends

Frequency	Overall	NJ	NY	PA	MD	CT	MA
Less than once a year	12%	7%	19%	13%	26%	--	20%
Once a year	10%	6%	12%	16%	9%	10%	--
2-10 times per year	23%	34%	15%	14%	7%	--	6%
Monthly	12%	21%	9%	%	2%	--	--
Weekly	13%	24%	4%	2%	--	--	6%
None	29%	5%	38%	49%	52%	90%	66%
Not Sure	2%	1%	%	3%	2%	--	--

Figure 27: Visit New Jersey for friends

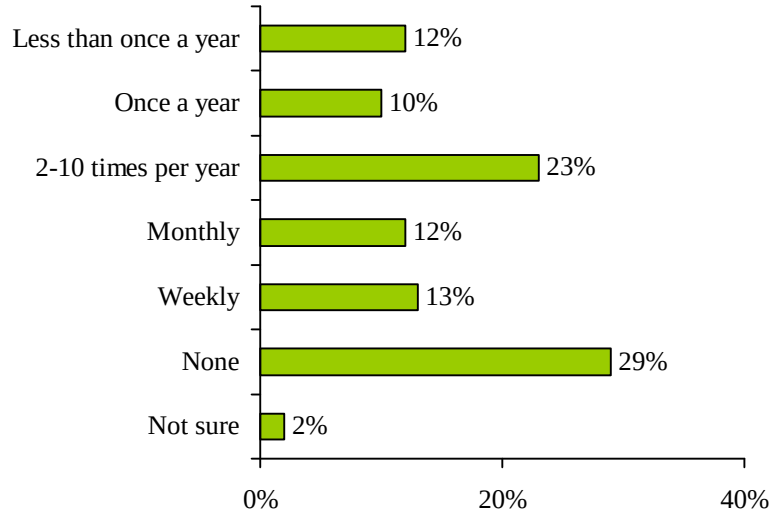
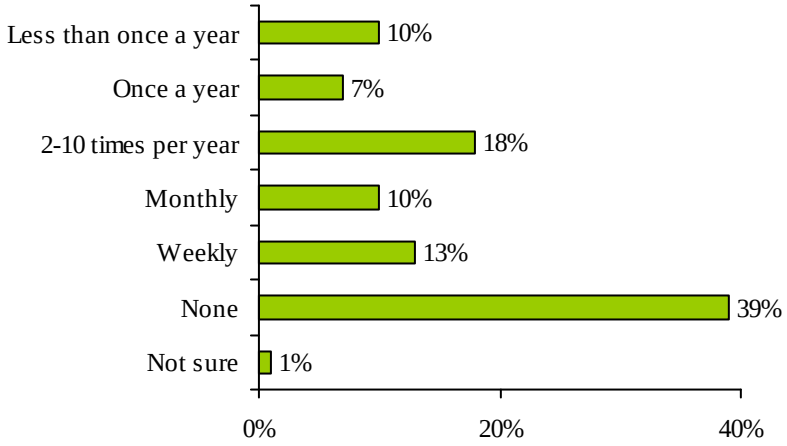


Table 19 details the percentage of respondents visiting New Jersey to see family. Once again the 2-10 times per year category comes out on top here, for visiting family, with 10% visiting less than once a year and another 10% visiting monthly. Thirteen percent visit weekly. Over 40% of those with family ties in New Jersey visit that family more than twice a year. This information is graphically depicted in Figure 28 below.

Table 19: Visit New Jersey for family

Frequency	Overall	NJ	NY	PA	MD	CT	MA
Less than once a year	10%	6%	14%	12%	11%	--	26%
Once a year	7%	4%	6%	13%	4%	9%	--
2-10 times per year	18%	27%	11%	12%	11%	--	--
Monthly	10%	19%	4%	1%	--	--	--
Weekly	13%	27%	2%	1%	--	--	--
None	39%	13%	59%	56%	70%	90%	66%
Not Sure	1%	1%	%	1%	2%	--	6%

Figure 28: Visit New Jersey for Family



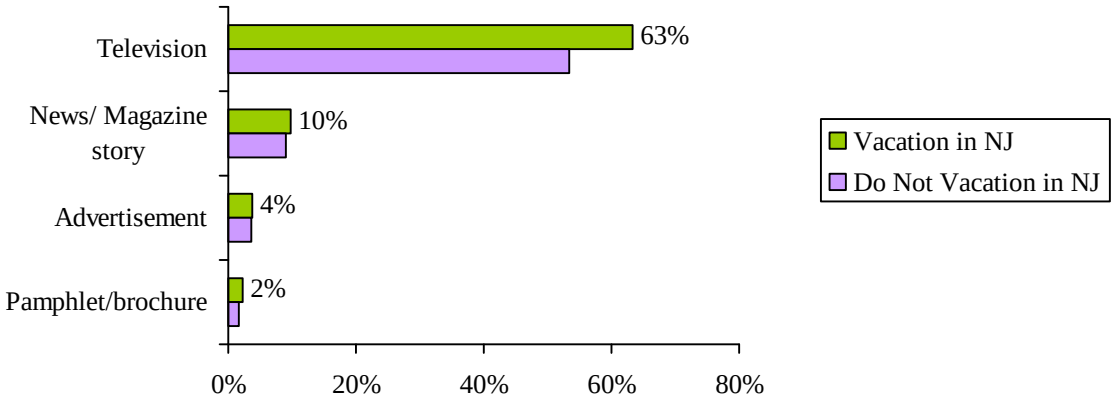
Question 28. From the following list please tell us, if you recall, having seen or heard anything about New Jersey? (Choose all that apply)

The media sources used for recalling information about New Jersey are presented in Table 20 and Figure 29. The television is the big winner here in terms of seeing or hearing information about New Jersey. More than half of the respondents have seen or heard something about New Jersey on television. Thirty-nine percent have seen or read a news story and 35% have seen an advertisement. Twenty-seven percent have read a pamphlet or brochure, and 20% have used a travel-planning guide.

Table 20: Sources for recalling New Jersey

	Overall	NJ	NY	PA	MD	CT	MA
Television	58%	64%	61%	52%	34%	36%	19%
News/ Magazine story	39%	44%	31%	40%	33%	11%	19%
Advertisement	35%	40%	33%	31%	25%	14%	14%
Pamphlet/brochure	27%	32%	18%	28%	14%	11%	5%
Billboard	22%	29%	16%	17%	18%	5%	10%
Travel planning guide	20%	24%	13%	21%	12%	4%	--
Coupon for New Jersey area attraction	20%	26%	11%	19%	10%	--	--
Tourism map of attractions	17%	21%	10%	18%	6%	7%	10%
New Jersey website	16%	21%	15%	9%	3%	4%	--
Postcard or mailer	15%	21%	10%	10%	6%	--	--
Vacation website	15%	19%	11%	14%	11%	5%	--
Other Internet site	15%	17%	16%	12%	11%	9%	--
Other	14%	16%	10%	8%	29%	14%	24%
Travel agent	13%	19%	8%	7%	3%	--	--
Not sure	8%	7%	7%	6%	16%	12%	--
Never been there	5%	--	8%	10%	12%	13%	--

Figure 29: Media sources recalled for information about New Jersey.



Question 29. Now, using the same list, please tell us which had the most impact on your decision to visit New Jersey/or a particular place in New Jersey, if you have ever been there. (Choose one.)

Table 21 and both Figure 30 and Figure 31 detail the media sources most impacting respondents' decisions to visit New Jersey. The most impact on their decision to visit New Jersey, or a particular place in New Jersey, was made by what they saw or

heard on the television (18%). Television's impact however, varies wildly when viewing the results by state from a low of 5% in Massachusetts to a high of 24% within New Jersey itself. Attempts should be made in future years to determine what "other" sources visitors are utilizing as this was the most common response to this question. Likely word of mouth from friends, family or other acquaintances is playing a role here.

Table 21: Sources impacting decision to visit New Jersey

Source	Overall	NJ	NY	PA	MD	CT	MA
Other	24%	20%	32%	27%	32%	14%	19%
Television	18%	24%	14%	13%	6%	17%	5%
Not sure	13%	16%	10%	8%	17%	--	29%
Never been there	9%	--	18%	20%	18%	--	24%
News/ Magazine story	6%	8%	2%	7%	2%	--	5%
Pamphlet/brochure	5%	5%	3%	4%	5%	9%	5%
Advertisement	4%	5%	4%	3%	3%	--	5%
Other Internet site	4%	5%	4%	4%	1%	--	--
Travel planning guide	3%	4%	1%	1%	2%	--	5%
Coupon for NJ area attraction	3%	2%	6%	2%	2%	2%	--
New Jersey website	3%	4%	1%	2%	--	4%	--
Vacation website	3%	4%	2%	3%	5%	--	--
Tourism map of attractions	2%	1%	1%	4%	--	--	--
Postcard or mailer	1%	1%	1%	1%	--	--	5%
Billboard	1%	2%	--	--	6%	--	--
Travel agent	1%	--	1%	1%	--	2%	--

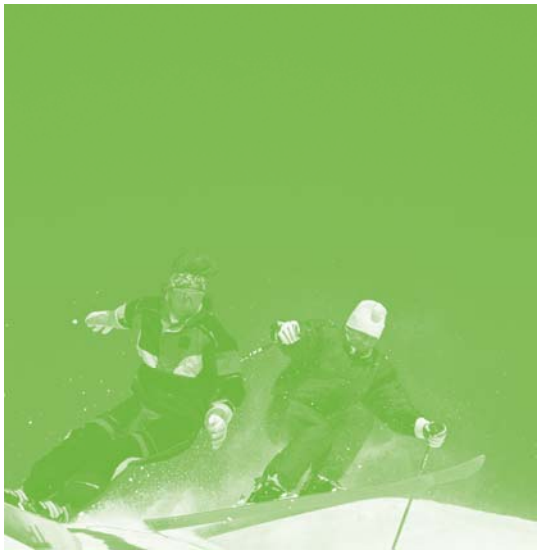
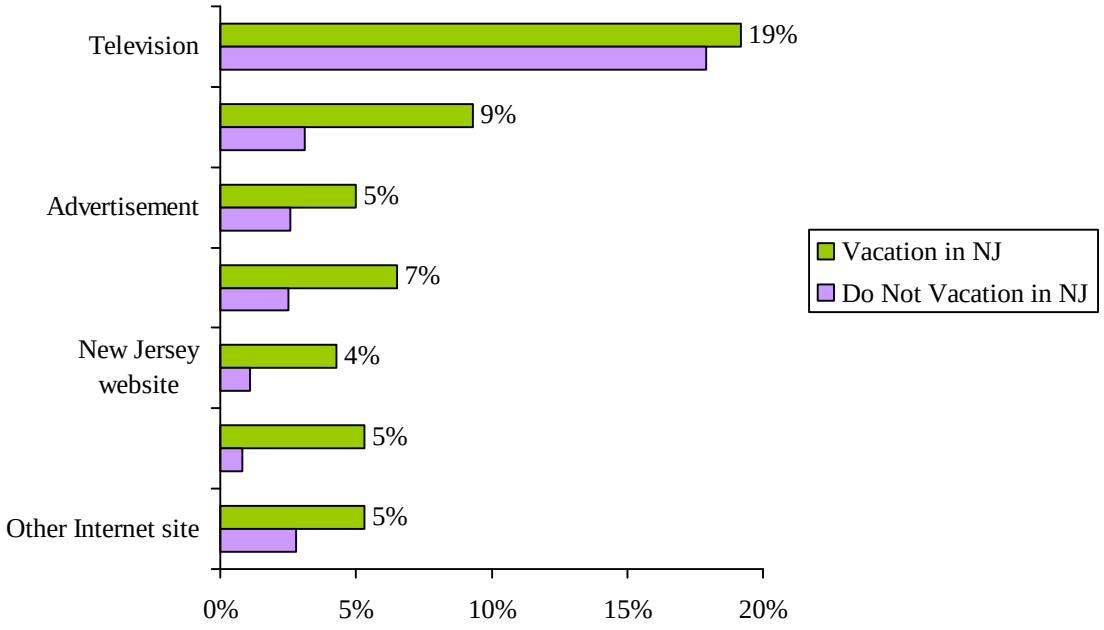
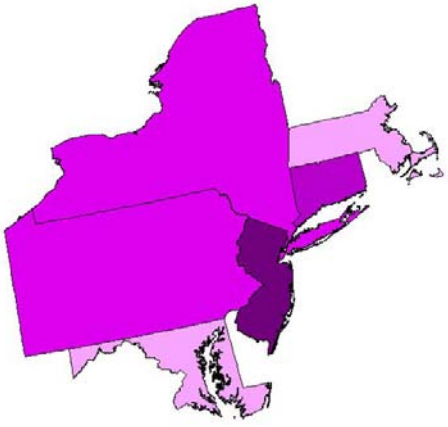


Figure 30: Top seven sources of information impacting decision to visit New Jersey



Television appears to have the most significant impact on travelers' decisions to visit New Jersey (see Figure 31). The media help to frame potential visitors' impressions of New Jersey as a destination. Television, particularly news coverage, should be managed through public relations efforts and press releases to ensure that this impact is a benefit to state visitation. All public relations and advertising on television should direct viewers to VisitNJ.org where detailed information can be found.

Figure 31: Television's impact on New Jersey vacations by state of origin



State	Television
New Jersey	24%
Connecticut	17%
New York	14%
Pennsylvania	13%
Maryland	6%
Massachusetts	5%

Question 30. Please tell me what most impressed you about New Jersey as a result of the story or advertisement that had the most impact on you. Choose one

Combined, more than 39% of those in the survey mentioned the description of a particular activity (26%) within New Jersey travel advertisements and the wide variety of activities (13%) as having left a favorable impression on them (see Table 22 and Figure 32 and Figure 33). It seems travelers want a game-plan when making arrangements; knowing that a particular activity is available is a draw. Advertising and promotion, whether on the internet, television or other medium, should attempt to segment visitors by their activity type. Allowing visitors to easily access information that coincide with their preferences will help in forming and maintaining positive impressions of New Jersey as a vacation destination.

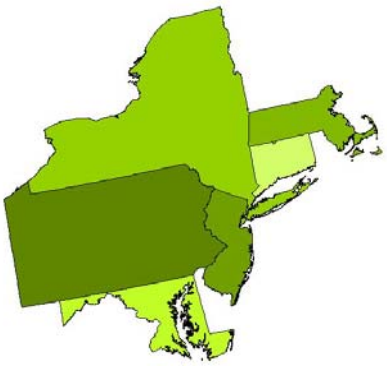
Table 22: New Jersey advertising element most impressing respondent

Advertising Element	Overall	NJ	NY	PA	MD	CT	MA
The description of a particular activity (for example - the beach, or a casino)	26%	26%	21%	32%	19%	15%	38%
*Other	14%	13%	16%	14%	17%	19%	5%
Wide variety of activities	13%	15%	11%	12%	4%	--	--
The pictures	11%	14%	9%	11%	5%	12%	--
Not sure	10%	8%	15%	10%	18%	11%	10%
The description of the state in general	9%	13%	6%	3%	2%	13%	5%
I have never seen or read anything about NJ	8%	--	15%	12%	28%	--	43%
Affordability	5%	6%	6%	3%	2%	--	--
Good maps/easy to get around	5%	6%	3%	4%	5%	2%	--

***Other:** CT: Seashore; Casino; Nothing; Not impressed (one each) MA: Convenient, easy access, close to home (1 each)

Figure 32 depicts the percentage of respondents citing activities in New Jersey as having impressed them the most. Of particular note here is that Maryland and Connecticut residents do not feel the same level of impression when it comes to activities in the state as do respondents from all other states. There is an appreciable drop off in this response between the high of 44% experienced in Pennsylvania and New York at 32%. In all cases, advertising geared at accentuating the activities that exist in the state will help to improve these responses.

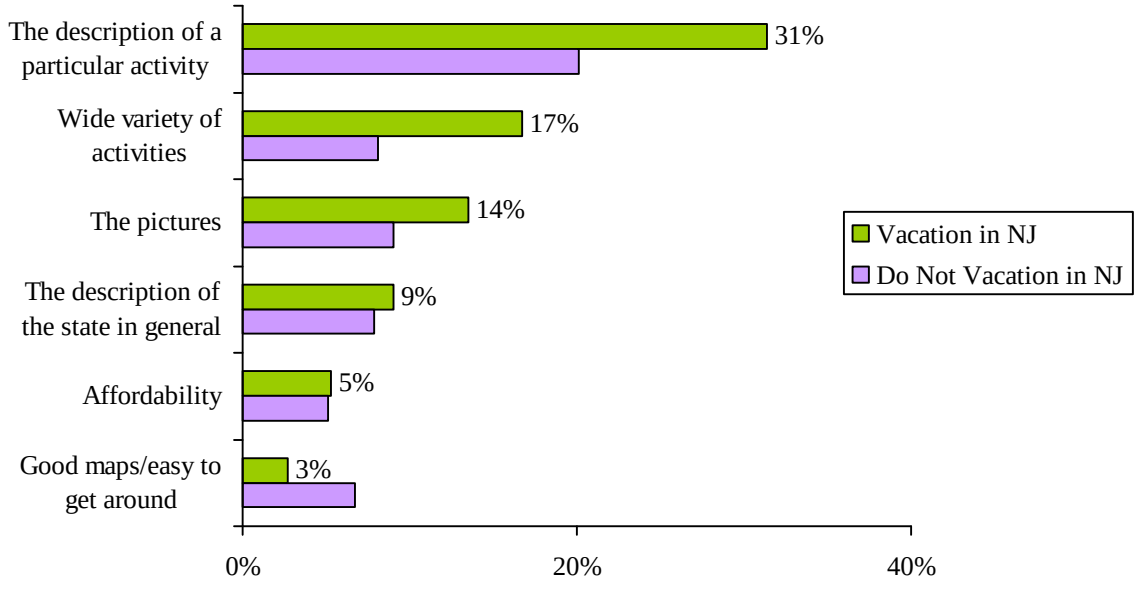
Figure 32: Respondents citing activities in New Jersey as impressing them the most



State	Activities
Pennsylvania	44%
New Jersey	41%
Massachusetts	38%
New York	32%
Maryland	24%
Connecticut	15%

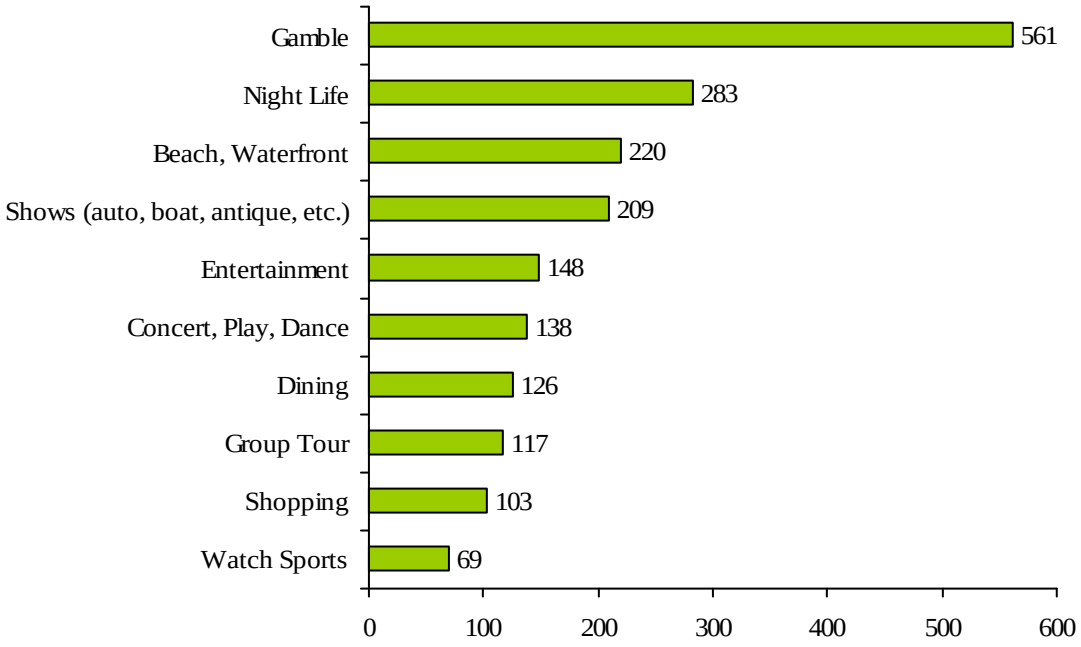
Figure 33 depicts respondents' answers to the question of what impressed them most as part of the New Jersey travel advertisement they had experienced. The description of a particular activity rated highest for both those that vacation in New Jersey as well as for those who do not. This combined with the wide variety of activities account for the lion's share of the responses to this question.

Figure 33: Most impressive part of New Jersey travel advertisements



Making these activities easily accessible likely means more meaningful short-cut menus from the state travel website's splash page. The exact means of segmenting visitors to the site by their activity participation was not wholly ascertained by this study. The state can find such information in the most recent Visitor Profile Study that produced the following index of activity participation (see Figure 34). The average for the United States relative to any particular activity is 100. Values above 100 therefore suggest that particular activity is much more important to visitors to the state of New Jersey; values below 100 suggest the opposite.

Figure 34: New Jersey activity index[20]



Gambling is by far the most prominent activity New Jersey visitors participate in relative to the US population as a whole. Night life, beach/waterfront activities, and travel/trade shows all have activity index values twice that of the national average (i.e. 200 or above). Interestingly, those visiting New Jersey to view sporting events have an activity index of 69 suggesting this activity is participated in less in New Jersey compared with the national average. With the recent success of the Rutgers college

[20] DK Shifflet and Associates Ltd.. (2007). New Jersey Tourism Research: FY2006p Visitor Profile. Retrieved April 5, 2007 from the New Jersey Commerce, Economic Growth & Tourism Commission website: http://www.state.nj.us/travel/ppt/fy2006-visitor-profile-3-29-07.ppt

football season there might be room to increase the number of visitors to the state interested in watching sports. With respect to college football, both New York City and Philadelphia (both New Jersey's primary feeder markets) lack a nationally ranked college football team.

Question 31. Again thinking about the information you have encountered regarding New Jersey, please tell me whether it inspired you to do any of the following. (Choose all that apply)

Figure 35 and Table 23 show how advertising for the state of New Jersey might have prompted behavioral changes in the respondents. Thirty-six percent were inspired to mention New Jersey to a friend or family member. Twenty-eight percent were provoked to consider New Jersey as a vacation destination and 27% investigated a trip to New Jersey. Twenty-two percent planned and booked a trip to New Jersey. Twenty percent visited the New Jersey website.

Figure 35: Advertising behavioral change

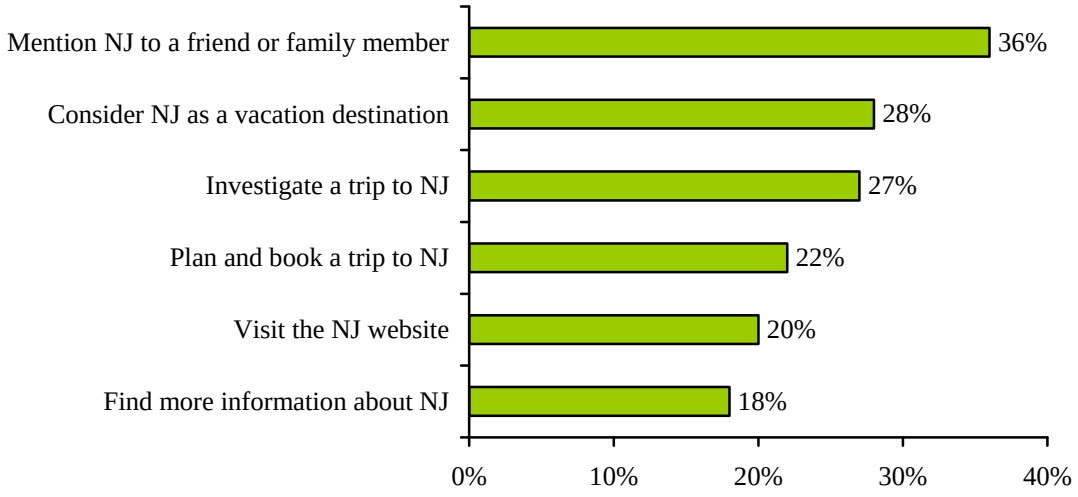


Table 23 depicts behavioral changes reported to be induced by travel and tourism advertising about New Jersey. Thirty-six percent of respondents were inspired to mention New Jersey to a friend or family member based on information they had encountered regarding New Jersey. Twenty-seven percent suggested they would be motivated to investigate a trip. Twenty percent were motivated to visit the state of New Jersey's website. Efforts to increase the visibility of VisitNJ.org might be very beneficial.

Table 23: Advertising behavioral change

	Overall	NJ	NY	PA	MD	CT	MA
Mention NJ to a friend or family member	36%	45%	22%	33%	31%	12%	10%
Consider NJ as a vacation destination	28%	33%	18%	32%	14%	13%	10%
Investigate a trip to NJ	27%	30%	28%	25%	19%	18%	5%
None	27%	24%	24%	29%	41%	46%	48%
Plan and book a trip to NJ	22%	26%	20%	17%	11%	14%	--
Visit the NJ website	20%	26%	13%	15%	7%	13%	--
Find more information about NJ	18%	22%	16%	11%	11%	18%	5%
Other	6%	6%	7%	4%	9%	9%	--
I have never seen or read anything about NJ	6%	--	13%	10%	15%	16%	29%
Not sure	3%	6%	2%	1%	--	--	--

Question 32. What are your general perceptions about New Jersey? (Verbatim responses)

Table 24 through Table 28 show the perceptions individuals have of the state of New Jersey by their state of resident. It is important to note that the majority of respondents in all states had overwhelmingly positive comments with regard to their perceptual image of New Jersey. The beaches, seashore and ocean as well as the variety of activities to do in the state stand out as the most common response to this image question. With regard to negative perceptions, overcrowding and cost appear to be the most influential variables.

Table 24: Pennsylvania residents' perceptions of New Jersey

Positive/neutral	Negative
Beaches, seashore, ocean (56)	Negative impression, not specific (29)
Positive impression, good state, not specific (43)	Crowded, congested, over-populated (17)
Nothing, not sure, n/a, not specific (38)	Expensive place to live (11)
Good vacation destination (27)	Heavy traffic, highways, bad drivers (10)
Variety of activities, lots of things to do (21)	Crime, drugs, law enforcement (8)
Casinos, racetracks, gambling (18)	Air pollution, it stinks, bad water, deterioration (6)
Convenient, easy access, proximity to NYC, Philly, etc (15)	High taxes (6)
Industrialized, business activity, jobs (14)	Overdevelopment, urban sprawl (5)
Good place to live, raise family, retire (11)	
Ambivalent opinion (11)	
Beautiful, pretty, "Garden State" (9)	
People are nice, friendly (9)	
Atlantic City (8)	
Diversity of nature, geography, scenic (6)	
Clean, cleanup progress (6)	
Good food, fine dining (5)	
Underrated, underappreciated & misunderstood (4)	
Quiet, peaceful, safe (4)	
Affordable (4)	
Historical significance, sites (3)	
Ocean City (3)	
Cultural attractions, events, opportunities (2)	
Agriculture, farmland, rural countryside (2)	
Education, schools, colleges (2)	
Weather, climate, seasons (2)	
Construction, progressive (2)	
Cape May (2)	

One each: Corrupt politicians, inept government; No self service gas; Affluence; No one speaks English

Table 25: New Jersey residents' perceptions of New Jersey

Positive/neutral	Negative
Positive impression, good state, not specific (140)	High taxes (87)
Good place to live, raise family, retire (140)	Expensive place to live (78)
Variety of activities, lots of things to do (93)	Crowded, congested, over-populated (34)
Beaches, seashore, ocean (91)	Corrupt politicians, inept government (30)
Convenient, easy access, proximity to NYC, Philly, etc (42)	Negative impression, not specific (26)
Diversity of nature, geography, scenic (37)	Heavy traffic, highways, bad drivers (21)
Good vacation destination (35)	Air pollution, it stinks, bad water, deterioration (10)
Underrated, underappreciated & misunderstood (32)	High car insurance premiums (6)
Beautiful, pretty, "Garden State" (30)	Overdevelopment, urban sprawl (5)
Nothing, not sure, n/a, not specific (25)	Crime, drugs, law enforcement (4)
Industrialized, business activity, jobs (14)	Unfriendly, impatient people (2)
Weather, climate, seasons (14)	
Agriculture, farmland, rural countryside (13)	
Casinos, racetracks, gambling (10)	
Clean, cleanup progress (9)	
Mountains (9)	
Cultural attractions, events, opportunities (8)	
Historical significance, sites (8)	
Education, schools, colleges (8)	
People are nice, friendly (8)	
Never think about it, it's just home (6)	
Quiet, peaceful, safe (6)	
Ambivalent opinion (6)	
Good food, fine dining (4)	
Atlantic City (4)	
Affordable (4)	
Construction, progressive (3)	
Affluence (3)	
Good services, accommodating (2)	
Microcosm of the US (2)	
Health concerns (2)	
Cape May (2)	

One each: Nice towns; Camden; overly regulated; the wonderful governor; Princeton

Table 26: Maryland residents' perceptions of New Jersey

Positive/neutral	Negative
Nothing, not sure, n/a, not specific (13)	Crowded, congested, over-populated (5)
Positive impression, good state, not specific (9)	Negative impression, not specific (2)
Beaches, seashore, ocean (8)	
Diversity of nature, geography, scenic (4)	
Good place to live, raise family, retire (3)	
Expensive place to live (2)	
Ambivalent opinion (2)	

One each: Casinos, racetracks, gambling; Beautiful, pretty, "Garden State"; Heavy traffic, highways, bad drivers; Education, schools, colleges; Underrated, underappreciated & misunderstood; Variety of activities, lots of things to do; Industrialized, business activity, jobs; Agriculture, farmland, rural countryside; People are nice, friendly; Cultural attractions, events, opportunities; Mountains

Table 27: Massachusetts residents' perceptions of New Jersey

Positive/neutral	Negative
Nothing, not sure, n/a, not specific (5)	Air pollution, it stinks, bad water, deterioration (2)
Ambivalent opinion (2)	Negative impression, not specific (2)
	Heavy traffic, highways, bad drivers (2)
	Crowded, congested, over-populated (2)

One each: Casinos, racetracks, gambling; Positive impression, good state, not specific; Variety of activities, lots of things to do; Industrialized, business activity, jobs; Never think about it, it's just home; Overdevelopment, urban sprawl; Agriculture, farmland, rural countryside; Cultural attractions, events, opportunities; Nice towns; Good services, accommodating

Table 28: Connecticut residents' perceptions of New Jersey

Positive/neutral	Negative
Nothing not sure n/a not specific (7)	
Positive impression good stat, not specific (5)	
Beaches seashore, ocean (5)	
Industrialized business activity jobs (4)	

One each: Casinos, racetracks, gambling; Expensive place to live; Beautiful, pretty, "Garden State"; Heavy traffic, highways, bad drivers; Negative impression, not specific; Education, schools, colleges; Variety of activities, lots of things to do; Never think about it, it's just home; Air pollution, it stinks, bad water, deterioration; Quiet, peaceful, safe; Poverty

Question 33. What would make you consider New Jersey as your next destination if you were to travel away from home?

Things for children and adults to do are the most important considerations in the aggregate group (see Table 29 and Figure 36). These are followed by affordability, Sporting events or activities, museums and/or culture and the variety of accommodations in New Jersey. That other and nothing record as highly as they do should be further examined in future surveys.

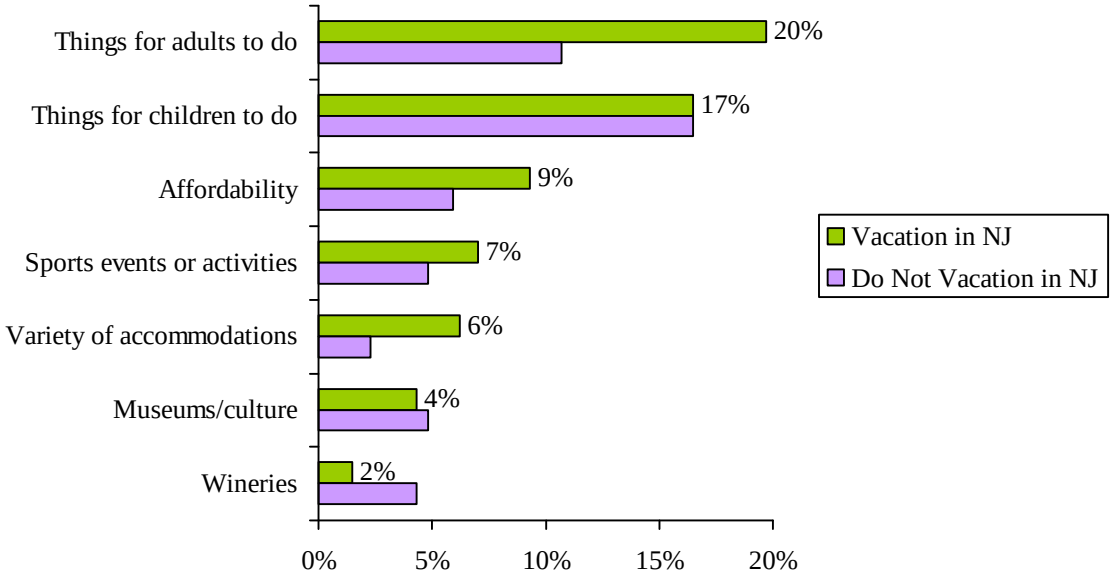
Table 29: Factors affecting decision to vacation in New Jersey

Deciding Factor	Overall	NJ	NY	PA	MD	CT	MA
Things for children to do	16%	19%	15%	15%	7%	4%	10%
Things for adults to do	15%	16%	15%	16%	14%	9%	5%
*Other	14%	10%	13%	20%	30%	17%	24%
Nothing	9%	7%	11%	8%	10%	38%	38%
Affordability	8%	8%	8%	7%	4%	9%	5%
Sports events or activities	6%	6%	6%	6%	--	5%	5%
Not sure	6%	9%	1%	3%	9%	6%	--
Museums/culture	5%	4%	4%	6%	7%	--	--
Variety of accommodations	4%	5%	5%	5%	--	--	--
A coupon or discount on lodging	4%	3%	5%	4%	3%	--	5%
Wineries	3%	5%	1%	1%	1%	--	--
Shopping	3%	3%	5%	1%	6%	7%	--
I don't take trips	3%	3%	2%	5%	7%	4%	--
A coupon or discount on an activity	2%	2%	5%	1%	1%	--	--
A coupon or discount on a destination	2%	2%	2%	2%	--	--	--
Close to airports	1%	1%	1%	1%	--	--	--

***Other:** CT: Beaches, seashore; Visit family & friends; Sightseeing, mountains, outdoor activities (1 each)

Figure 36 shows those factors that influence vacation decisions both for those that vacation in New Jersey and those that do not. Most striking is the disparity of respondents that vacation in New Jersey mentioning "Things for adults to do" as a deciding factor in their vacation relative to those respondents that do not vacation in the state. Likely the influence of Atlantic City as a destination with mainly adult activities is influencing this response heavily. It is also interesting to note that over one third more respondents (9.3% compared with 5.9%) mention the affordability of New Jersey for respondents that vacation in New Jersey compared with those that do not. New Jersey is rated higher for a variety of accommodations but lower in Wineries for those that vacation in New Jersey relative to those that do not vacation in the state.

Figure 36: Deciding factors for New Jersey as a vacation destination



Question 34. Thinking of your last trip anywhere, do you recall any advertising at all that led you to choose that particular destination?

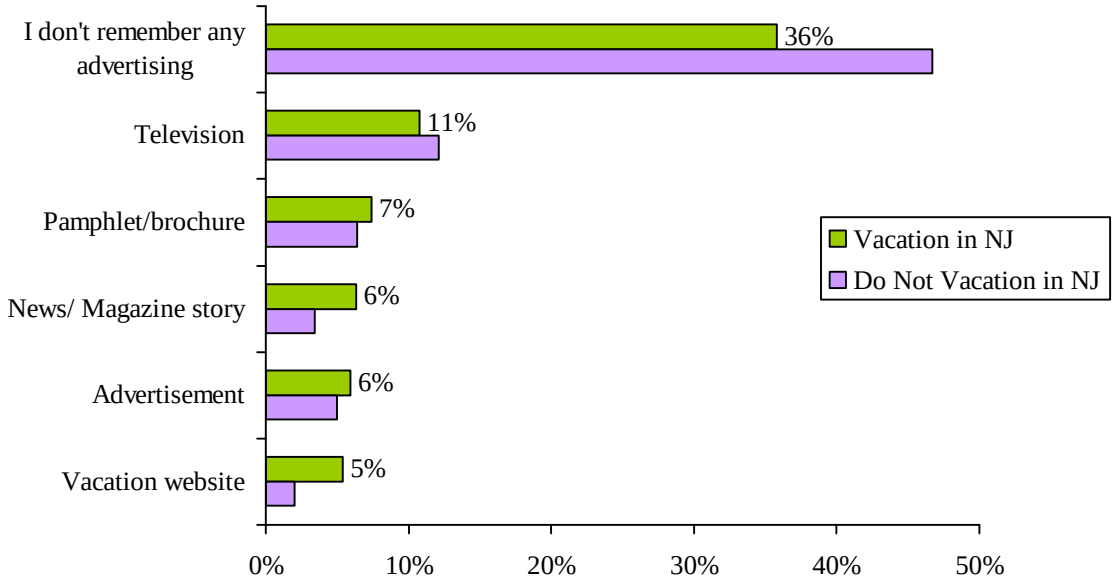
Table 30 details the advertising stimulus that prompted the respondents' last trip to any destination. When thinking of their last trip anywhere, a plurality does not remember any advertising and 11% saw some on television. Thirteen percent are not sure.

Table 30: Advertising stimulus for last trip anywhere

Advertising Stimulus	Overall	NJ	NY	PA	MD	CT	MA
I don't remember any advertising	41%	38%	40%	42%	51%	41%	76%
Not sure	13%	11%	13%	13%	14%	21%	--
Television	11%	12%	17%	6%	12%	13%	10%
Pamphlet/brochure	7%	7%	3%	12%	3%	6%	--
News/ Magazine story	5%	7%	2%	5%	--	--	10%
Advertisement	5%	6%	5%	6%	4%	--	--
Vacation website	4%	5%	3%	3%	2%	9%	--
I don't take trips	4%	2%	6%	6%	8%	4%	--
Travel planning guide	3%	3%	1%	4%	6%	--	--
Travel agent	2%	2%	1%	1%	--	--	--
New Jersey website	2%	2%	1%	1%	--	2%	--
Postcard or mailer	1%	2%	--	--	--	--	--
Coupon for New Jersey area attraction	1%	1%	1%	--	--	5%	--
Tourism map of attractions	1%	1%	--	1%	--	--	--
Billboard	1%	2%	1%	--	--	--	--

Figure 37 depicts the advertising stimulus for respondents' last trip anywhere, comparing those that vacation in New Jersey relative to those that do not. For those that vacation in New Jersey compared with those that do not, less reported not remembering the advertising (35.8% compared with 46.7%). This bodes well for recall of advertising conducted by New Jersey government and businesses as a much smaller percentage of respondents report not remembering ads about the state relative to other destinations. Indeed, higher percentages of respondents reported having been influenced by pamphlets/brochures, new/magazine stories, advertisements, and vacation websites for those vacationing in New Jersey relative to those that do not vacation in the state. Still, more individuals who do not vacation in New Jersey report having been influenced by television compared with those that vacation in New Jersey. This suggests that increasing advertising via this medium might have some positive benefits for vacationers to the state.

Figure 37: Advertising stimulus for last trip anywhere



Recommendations for Improving the Survey

The First Annual Survey to Improve the Effectiveness of Tourism Promotion was a success. Changes do however need to be made for the second survey to enjoy equal success. First and foremost the survey should be updated to reflect new strategies adopted by the New Jersey Office of Travel and Tourism in 2007. Information thusly obtained will help in a continual effort to ensure the survey reflects timely information relative to the promotional efforts of the state.

There were several instances where the respondents answered a particular question as "other". Specifically, the following questions had large numbers of individual responding with the non-specific answer of "other" (percentage of respondents follow the question in parenthesis):

- Question 2. When you go on a trip away from home, how do you get there? (27%)
- Question 3. When you go on a trip away from home what type of accommodation do you most frequently use? (19%)
- Question 15. Generally speaking where do you get most of your information about the places you travel to when you leave home? (6%)
- Question 16. Generally speaking where do you get the next most information about the places you travel when you leave home? (6%)
- Question 17. Generally speaking where do you get your third most important source of information about the places you travel to when you leave home? (9%)
- Question 19. In what way was your trip away from home better than you expected? (13%)
- Question 20. In what way was your trip away from home worse than you expected? (37%)
- Question 21. When do you usually make your plans for a trip away from home? This might include day trips, long weekends, visits with friends and family or business. (18%)

- Question 28. From the following list please tell us if you recall having seen or heard anything about New Jersey? (14%)
- Question 29. Now, using the same list, please tell us which had the most impact on your decision to visit New Jersey or a particular place in New Jersey if you have ever been there. (24%)
- Question 30. Please tell me what most impressed you about New Jersey as a result of the story or advertisement that had the most impact on you. (14%)
- Question 31. Again, thinking about the information you have encountered regarding New Jersey, please tell me whether it inspired you to do any of the following. (6%)
- Question 33. What would make you consider New Jersey as your next destination if you were to travel away from home? (14%)

Getting more specific answers to the above questions should be a goal of next year's survey. The large number of questions cited however might prevent the recording of every respondent's answers as these "other records" are costly and time consuming. It is suggested that a balance be struck here. First, we should consider what those "other" possible answers might be for each of the questions listed. Secondly, we should make a decision as to what "other" answers might be of most value to improving tourism promotion in New Jersey and ensure that exact answers are recorded.

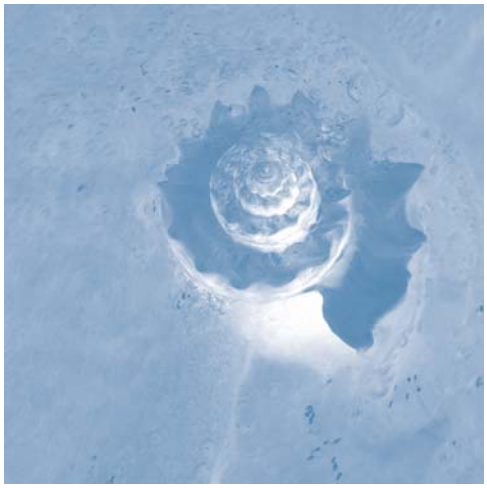
Conclusions

The survey has revealed that tourism promotion for the state of New Jersey does indeed help to attract both visitors and vacationers to the state. There is however room for improvement and this will be a challenge for New Jersey given the current budget situation in the state. The relative size of the promotional budget for the state of New Jersey is sorely lacking compared with neighboring states. New Jersey tourism remains strong and this strength will likely continue into the future. Its relative strength compared to neighboring states however will likely continue to suffer without a commitment to improving the state's funding of tourism promotion.

Television advertisements and promotion efforts seem to have the most impact on an individual's decision to visit New Jersey. Once that decision is made, visitors turn to friends and family as well as the internet for additional information more often than any other sources. It is recommended then that advertisements continue to promote the state's website. Furthermore, the website should be continually upgraded in order that it be easily navigable relative to the activities visitors are most interested in obtaining information about.

New Jersey's biggest strength as a vacation destination seems to be the wide variety of activities available within the state. Highlighting these activities in promotional efforts should continue to be a priority for the state. It is recommended that the states website be organized in such a fashion as to highlight these activities for visitors.

Most visitors to the state of New Jersey reside in both the Philadelphia and New York DMA's. Focusing advertisements on Washington, DC, Boston, MA and Baltimore, MD, in particular, might help to expand the market for New Jersey as a destination and thusly improve New Jersey's standing as a leader in tourism in the Mid-Atlantic Region. This, however, will require a commitment to funding the promotional efforts of the state.



Appendix A: Special Thanks to our Statewide 2006 – 2007 Advisory Group

Ms. Karen Adams, Director of Sales, Wheaton Arts
Mr. Howard Bacharach, Executive Director, Atlantic City Hotel & Lodging Association
Ms. Leslie Bensley, Executive Director, Morris County Visitors Center
Ms. Nancy Byrne, Executive Director, New Jersey Office of Travel and Tourism
Dr. David Carr, Provost & Executive Vice President, Richard Stockton College
Ms. Denise Hurlburt, President, Greater Atlantic City Region Tourism Council
Ms. Giulia Iannitelli, Executive Director, Skylands Tourism Council
Mr. Bill La Rosa, Director of Cultural Affairs & Tourism, Hudson County Office of Cultural Affairs & Tourism
Mr. Edward Loud, Chair, Monmouth County Park System
Dr. Alan Oppenheim, Dean, School of Business - Hospitality/Leisure Studies, Montclair University
Mr. Rummy Pandit, Director, Hospitality Management Program, Rutgers University
Mr. Ben Rose, Marketing Director, Wildwood Convention Center
Mr. James Rutala, Business Administrator, Ocean City
Ms. Marie Scocca-Draghi, Executive Director, Gateway Tourism Council
Mr. Bernard Spigner, Director of Communications, New Jersey Sports & Exposition Authority
Ms. Barbara Steele, Director, Ocean County Public Affairs/Tourism
Mr. Joseph Tormey, Director, Hospitality Management Program, Fairleigh Dickinson University
Dr. Brian Tyrrell, Assistant Professor, Hospitality and Tourism Management Program, Richard Stockton College
Ms. Donna Vassallo, Assistant Professor, Hospitality Management, Atlantic Cape Community College
Dr. Cliff Whithem, Director, Hospitality and Tourism Management Program, Richard Stockton College
Ms. Diane Wieland, Executive Director, Southern Shore Tourism Council
Dr. Howard Worts, CFE, Manager, New Jersey State Fair

Appendix B: New Jersey Office of Travel and Tourism Staff

Nancy Byrne
Executive Director Travel & Tourism
New Jersey Office of Travel and Tourism

Steven Stegman, Deputy Director
Daniel Cappello, Technical Assistant
Janet Field, Telemarketing Technical Assistant
Colleen Karr, Technical Assistant
Dorothy Little, Technical Assistant
Phyllis Oppenheimer, Telemarketing/Visitor Services Specialist

Appendix C: About the New Jersey Center for Hospitality and Tourism Research at the Richard Stockton College of New Jersey

Mission

The New Jersey Center for Tourism and Hospitality Research at the Richard Stockton College of New Jersey collects and disseminates statewide information on tourism and hospitality, conducts applied research activities, hosts distinguished guest lecture series, and houses a web site for furthering the goals of the Center.

In addition, the Center works closely with a statewide Advisory Council of tourism and hospitality professionals throughout the state of New Jersey as well as the prominent polling firm Zogby International on design and implementation of polling operations. The results of these polls, and other data relevant to the tourism industry in the state of New Jersey, are made available to statewide tourism and hospitality professionals through the Center.

Leadership

Dr. Brian J. Tyrrell
Interim Director
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Dr. Cliff Whithem
Founding Chair, Advisory Council

Dr. David L. Carr
Provost and Executive Vice President

Appendix D: Survey Instrument

1. Do you take a trip away from home at least once a year? This might include day trips, long weekends, visits with friends and family or business?

2. When you go on a trip away from home, how do you get there? ***(Choose the method you use most often)***

3. When you go on a trip away from home what type of accommodations do you most frequently use?

4. For how long do you usually go on a trip away from home?

5 – 14. For the following words or phrases, on a scale of 1 to 5, with 1 being not at all important and 5 being most important, please tell me how important each is to you when you are making plans to take a trip away from home such as a day trip, long weekend, visit with friends and family or business.

Shopping
Dining
Nightlife
Lodging
Family activities
Outdoor spaces
Price
Events
Entertainment
Attractions

15. Generally speaking where do you get most of your information about the places you travel to when you leave home?

16. Generally speaking where do you get the ***next*** *most information about the places you travel to when you leave home?*

17. Generally speaking what is your ***third*** *most important source of information about the places you travel to when you leave home?*

18. Was your last trip away from home better than you expected, worse than you expected or about what you expected?

19. ***(Asked only of those who said their last trip was better than expected.)*** *In what way was your trip away from home better than you expected?*

20. ***(Asked only of those who said their last trip was worse than expected.)*** *In what way was your trip away from home worse than you expected?*

21. When do you usually make your plans for a trip away from home? This might include day trips, long weekends, visits with friends, and family or business?

22. ***(Not asked in New Jersey.)*** *Have you ever visited the state of New Jersey?*

23. Have you ever vacationed in New Jersey?

24. ***(Not asked in New Jersey.)*** *Do you now, or have you ever, lived in New Jersey?*

25 – 27. How often do you visit New Jersey, or areas in New Jersey if you are a resident, for the following purposes?

Leisure
Visiting friends
Visiting family

28. From the following list please tell us, if you recall, having seen or heard anything about New Jersey? ***(Choose all that apply)***

Television
News/ Magazine story
Advertisement
Pamphlet/brochure
Travel planning guide
Postcard or mailer
Coupon for New Jersey area attraction
Tourism map of attractions
Billboard
Travel agent
New Jersey website
Vacation website
Other Internet site
Other
Not sure
Never been there

29. Now, using the same list, please tell us which had the most impact on your decision to visit New Jersey/or a particular place in New Jersey, if you have ever been there. ***(Choose one.)***

30. Please tell me what most impressed you about New Jersey as a result of the story or advertisement that had the most impact on you. Choose one

The pictures
The description of the state in general
The description of a particular activity (ex, the beach, or a casino)
Affordability
Good maps/easy to get around
Wide variety of activities
*Other
Not sure
I have never seen or read anything about New Jersey

31. Again thinking about the information you have encountered regarding New Jersey, please tell me whether it inspired you to do any of the following. ***(Choose all that apply)***

Consider New Jersey as a vacation destination
Mention New Jersey to a friend or family member
Investigate a trip to New Jersey
Visit the New Jersey website
Find more information about New Jersey
Plan and book a trip to New Jersey
Other
None
Not sure
I have never seen or read anything about New Jersey

32. What are your general perceptions about New Jersey? ***(Verbatim responses)***

33. What would make you consider New Jersey as your next destination if you were to travel away from home?

Things for children to do
Things for adults to do
Wineries
Affordability
Variety of accommodations
Museums/culture
Shopping
Sports events or activities
Close to airports
A coupon or discount on lodging
A coupon or discount on an activity
A coupon or discount on a destination
*Other
Not sure
I don't take trips
Nothing

34. Thinking of your last trip anywhere, do you recall any advertising at all that led you to choose that particular destination?

Television
News/ Magazine story
Advertisement
Pamphlet/brochure
Travel planning guide
Postcard or mailer
Coupon for New Jersey area attraction
Tourism map of attractions
Billboard
Travel agent
New Jersey website
Vacation website
I don't remember any advertising
Not sure
I don't take trips