

2015 Tourism Promotion Survey

The Profile of the Mid-Atlantic Traveler



STOCKTON
UNIVERSITY

LLOYD D. LEVENSON INSTITUTE
OF GAMING, HOSPITALITY & TOURISM

2015 Tourism Promotion Survey

In the spring of 2015, the Lloyd D. Levenson Institute of Gaming, Hospitality and Tourism at Stockton University utilized Survey Monkey to administer a visitor profile survey to over 800 respondents. Respondents were selected based on whether or not they had taken a trip In the Northeast United States, from Maine to Maryland. Travelers to be surveyed were chosen from Connecticut, Delaware, the District of Columbia, Maryland, New Jersey, New York and Pennsylvania. The research hoped to shed some light on travelers from those destinations that represent the primary market for New Jersey Tourism. We were interested in describing these travelers visits both to New Jersey locations as well as other, close by destinations in the Northeast United States.

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Photo courtesy of Atlantic City Convention and Visitors Authority

Front cover photo courtesy of Cape May County Department of Tourism



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

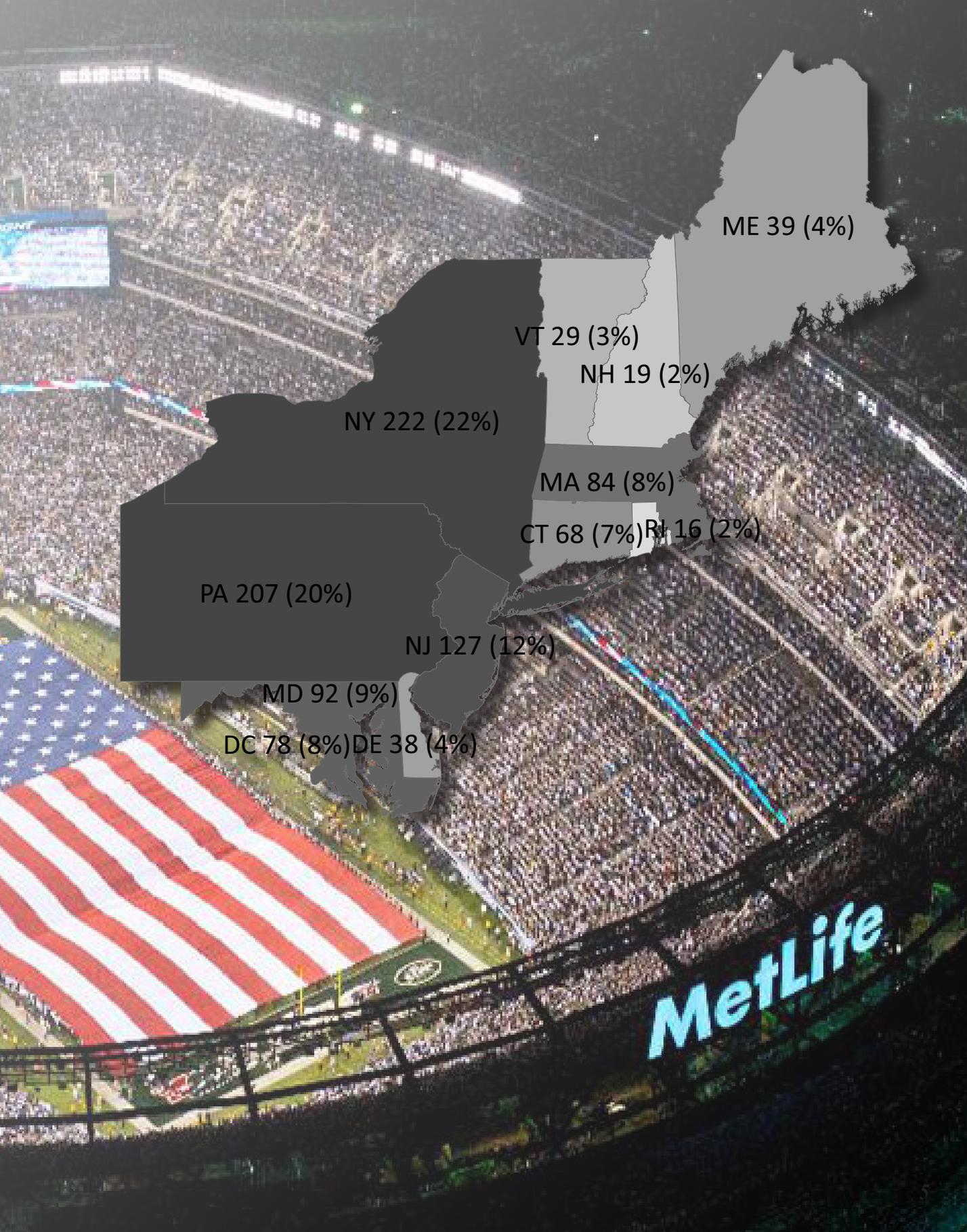
Which United States Northeast Destination 50 miles from home did you last visit?

The most visited state was New York (222 respondents or 22%) followed closely by Pennsylvania (207, 20%). More than 12% of respondents (127) had visited New Jersey. Undoubtedly a couple of forces are at play in the distribution of the Mid-Atlantic travelers destination choice.

First, the distance of the destination from the travelers origin plays a role, with those destinations in New England having been visited by the Mid-Atlantic travelers less than those destinations closer to the travelers' origin. The research team sampled in the Mid-Atlantic states of Connecticut, Delaware, the District of Columbia, Maryland, New Jersey, New York and Pennsylvania. Secondly, the presence of large cities draw visitors willing to travel further, boosting figures for Maryland (92, 9%), Massachusetts (84, 8%), Washington, DC (78, 8%), and the aforementioned New York and Pennsylvania.

New Jersey faces significant competition as a destination in the United States northeast region. This report seeks to highlight differences between respondents from New Jersey's primary market (the Mid-Atlantic Region) that were traveling to New Jersey and respondents who noted they were traveling to some other Northeast United States region.

*Photo courtesy of the
Meadowlands Liberty Convention and Visitors Bureau*



ME 39 (4%)

VT 29 (3%)

NH 19 (2%)

NY 222 (22%)

MA 84 (8%)

CT 68 (7%) RI 16 (2%)

PA 207 (20%)

NJ 127 (12%)

MD 92 (9%)

DC 78 (8%) DE 38 (4%)

MetLife

Stages in the Family Life Cycle or LifeStage of the Visitor

Segmenting visitors by their stage in the family life cycle (LifeStage¹) is useful for target marketing purposes.

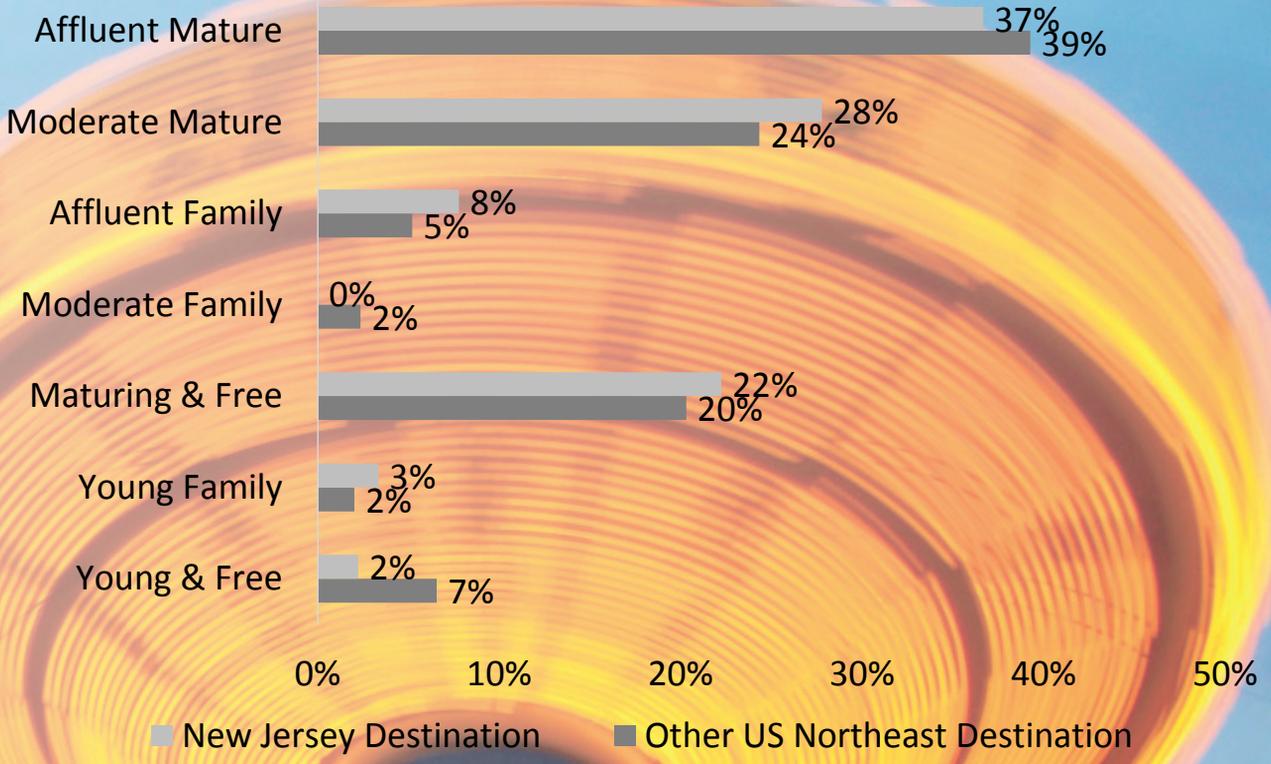
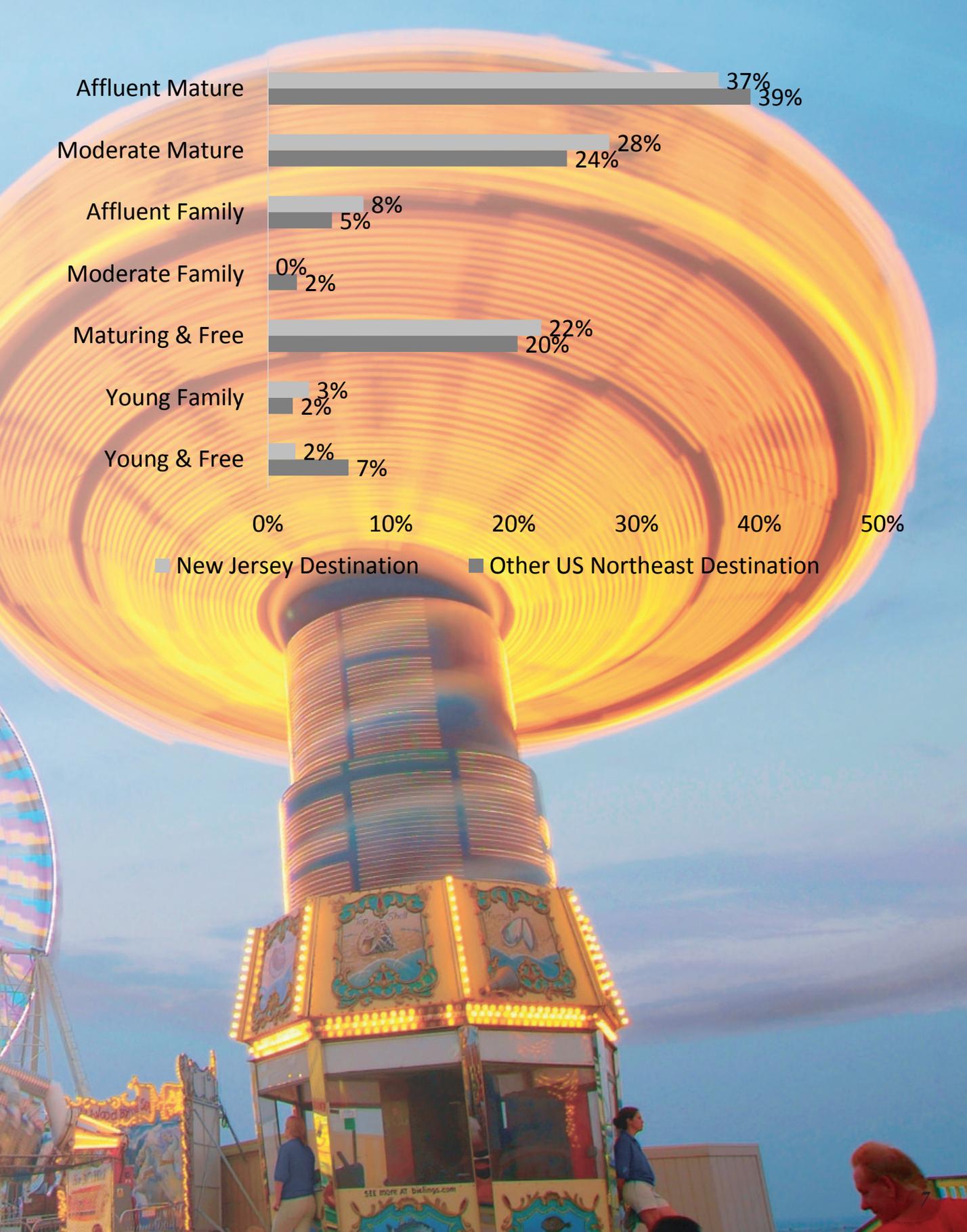
LifeStage analysis considers a visitor's age, their household income and whether or not they have children under the age of 18. Here we compare the LifeStage visitors to New Jersey with those visitors to other United States Northeast destinations.

Perhaps most notable when making this comparison is the striking similarity. This is strong evidence that New Jersey is competing largely for the same visitor with these other US Northeast destinations. Two notable exceptions are a higher penetration by New Jersey of the Moderate Mature Visitors (28% of New Jersey visitors but 24% of other US Northeast visitors), and a lower penetration rate of the Young & Free (2% for New Jersey visitors but 7% for other US Northeast visitors).

<u>LifeStage</u>	<u>Age of the Household Head</u>	<u>Household Income</u>	<u>Children Under Age 18</u>
Young & Free	18-34 Years	Any	No
Young Family	18-34 Years	Any	Yes
Maturing & Free	35-54 Years	Any	No
Moderate Family	35-54 Years	Under \$75k	Yes
Affluent Family	35-54 Years	\$75k or Higher	Yes
Moderate Mature	55 Years or Older	Under \$75k	No
Affluent Mature	55 Years or Older	\$75k or Higher	No

1. DK Shifflet (2015). New Jersey Overnight Leisure Visitor Profile. A report prepared for the New Jersey Division of Travel and Tourism. Available online at www.visitnj.org.

*Photo courtesy of
Cape May County Department of Tourism*

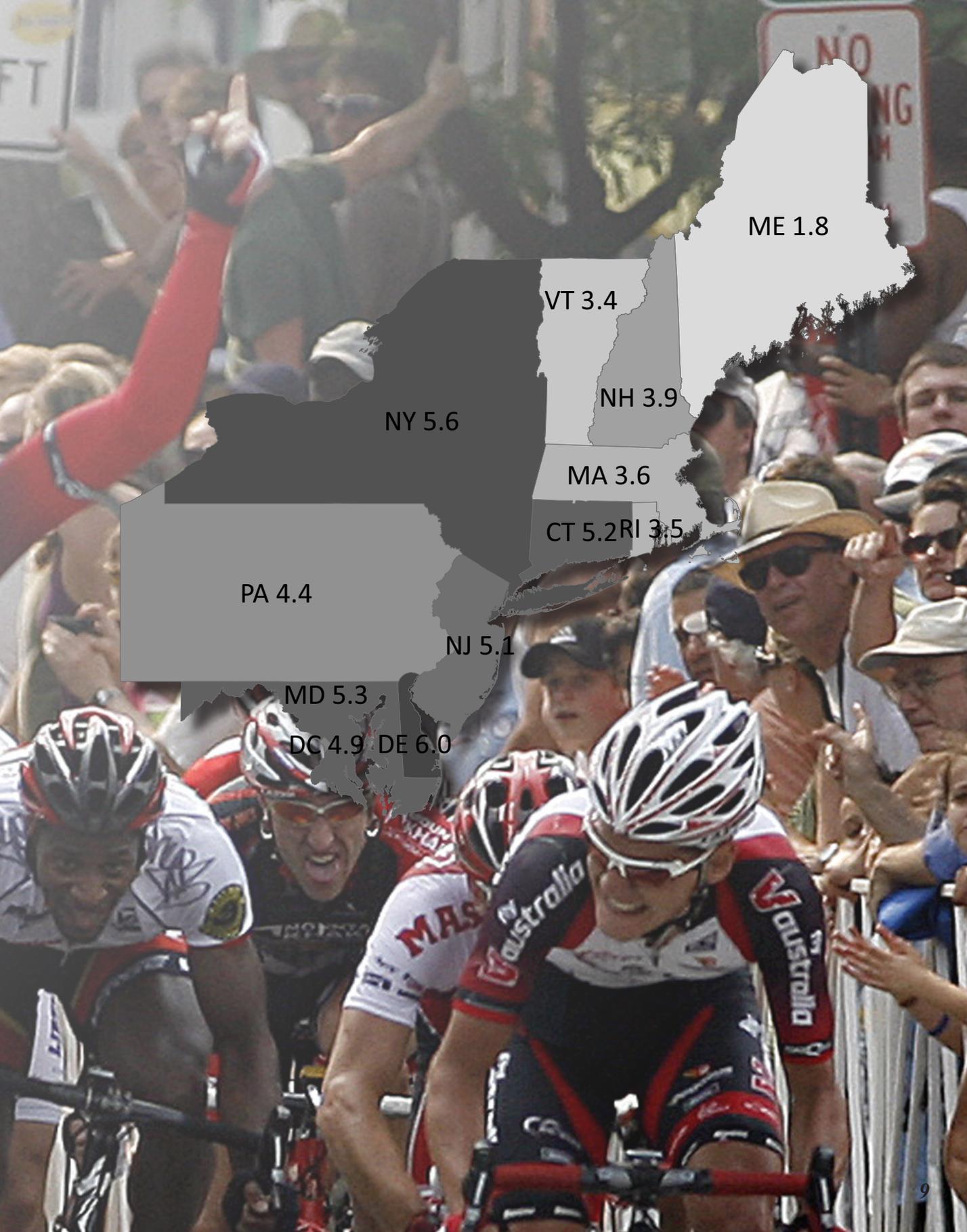


Previous Visitation

Distance plays a critical role in previous visitation as seen on the map; destinations closer to the travelers origin have a much greater likelihood of previous visits compared to those closer to home. New Jersey ranks fairly high with the average visitor having had 5.1 previous visits. That's not far behind Delaware (6.0), New York (5.6), Maryland (5.3) and Connecticut (5.2). Compared to all other United States Northeast destinations, New Jersey had a much higher percentage of visitors that had previously visited six or more times (41% compared to 47% respectively).



*Photo courtesy of
Somerset County Tourism*



ME 1.8

VT 3.4

NH 3.9

NY 5.6

MA 3.6

CT 5.2 RI 3.5

PA 4.4

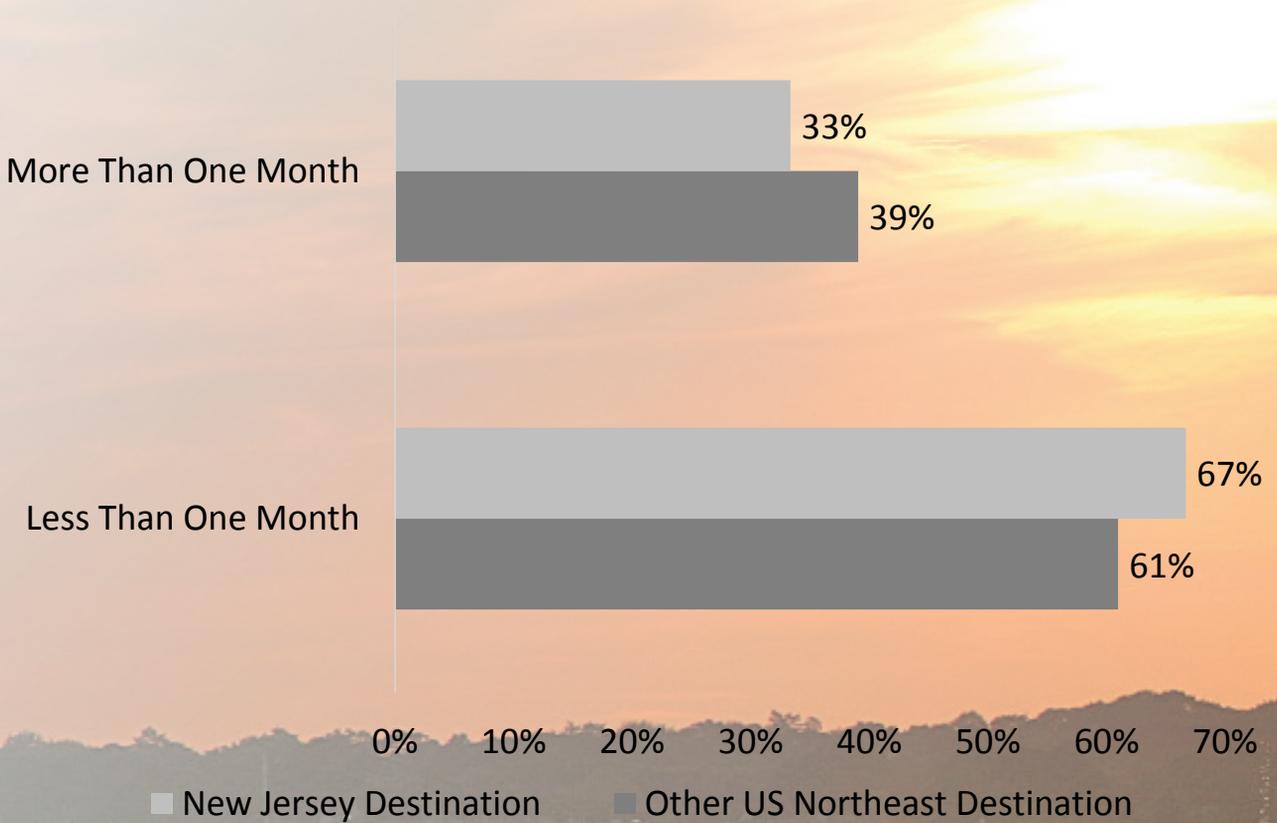
NJ 5.1

MD 5.3

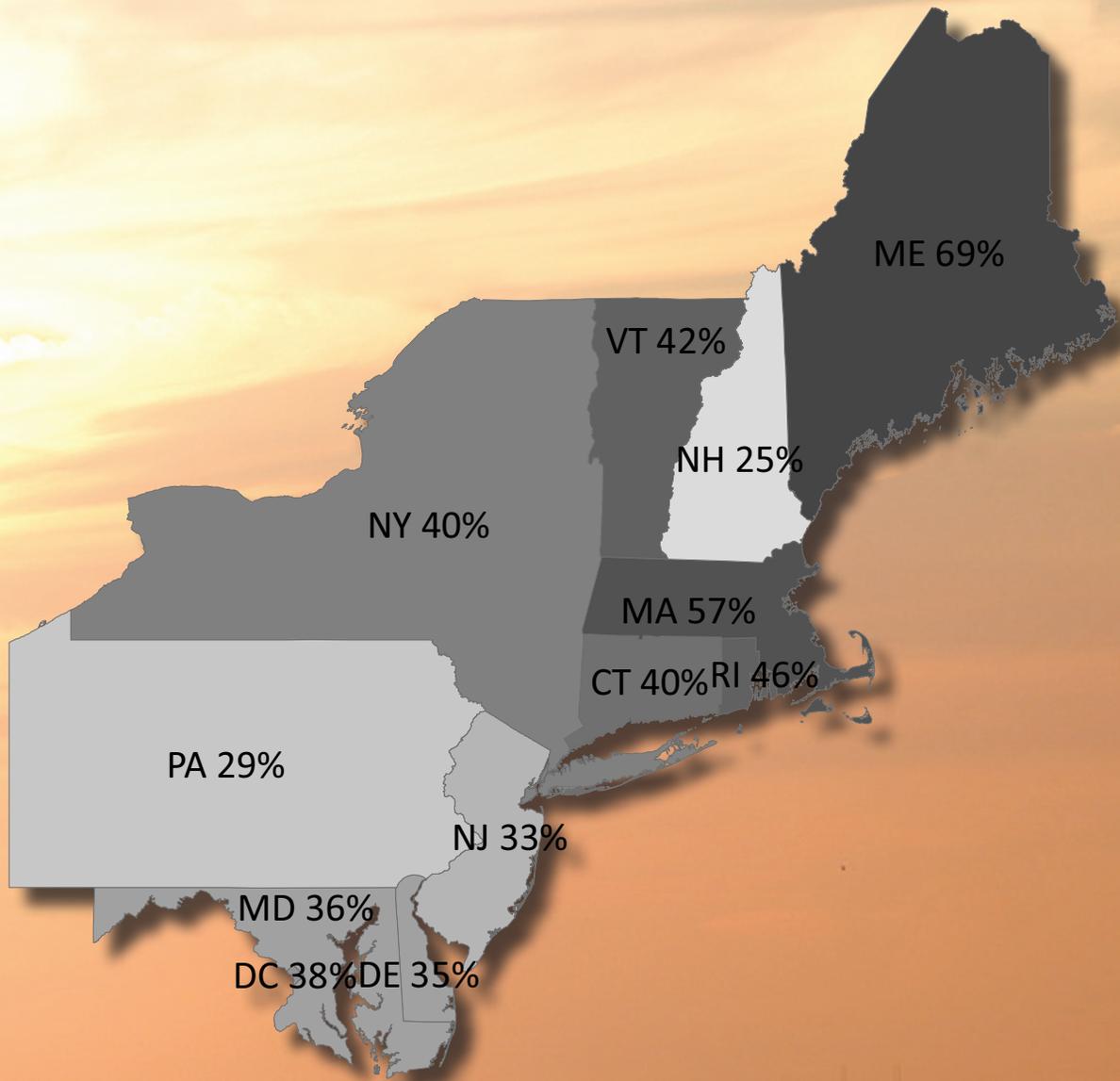
DC 4.9 DE 6.0

Trip Planning

Compared to all other United States Northeast destinations, planning for a trip to New Jersey is relatively less involved as evidenced by the number of travelers spending a month or more planning. New Jersey visitors had the third lowest percentage of travelers spending a month or more planning (33%), lower only for the New Hampshire (25%) and Pennsylvania (29%) visitors. Visits to Maine required the most advanced planning (69%), with Massachusetts also having over half (57%) of visitors spending a month or more planning that trip.

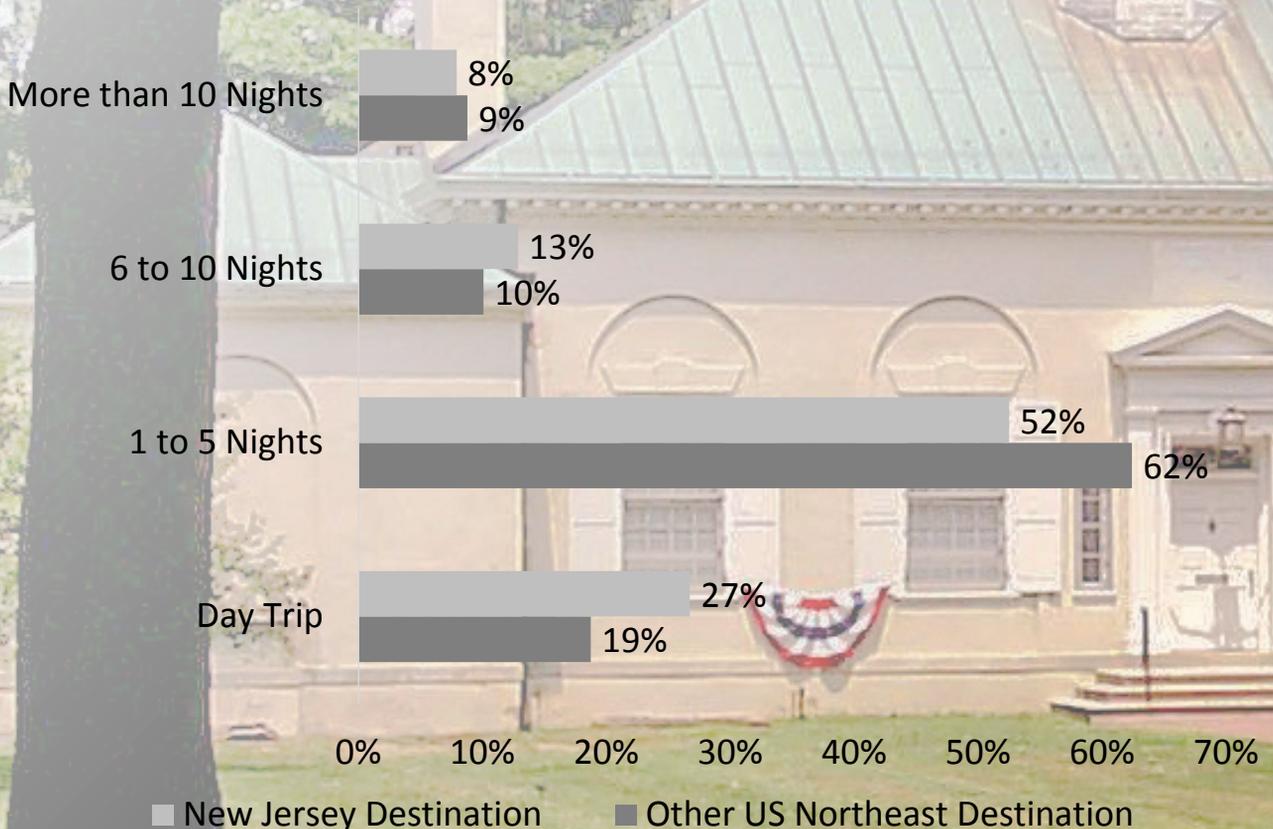


*Photo courtesy of
Jersey Shore Region Convention and Visitors Bureau*

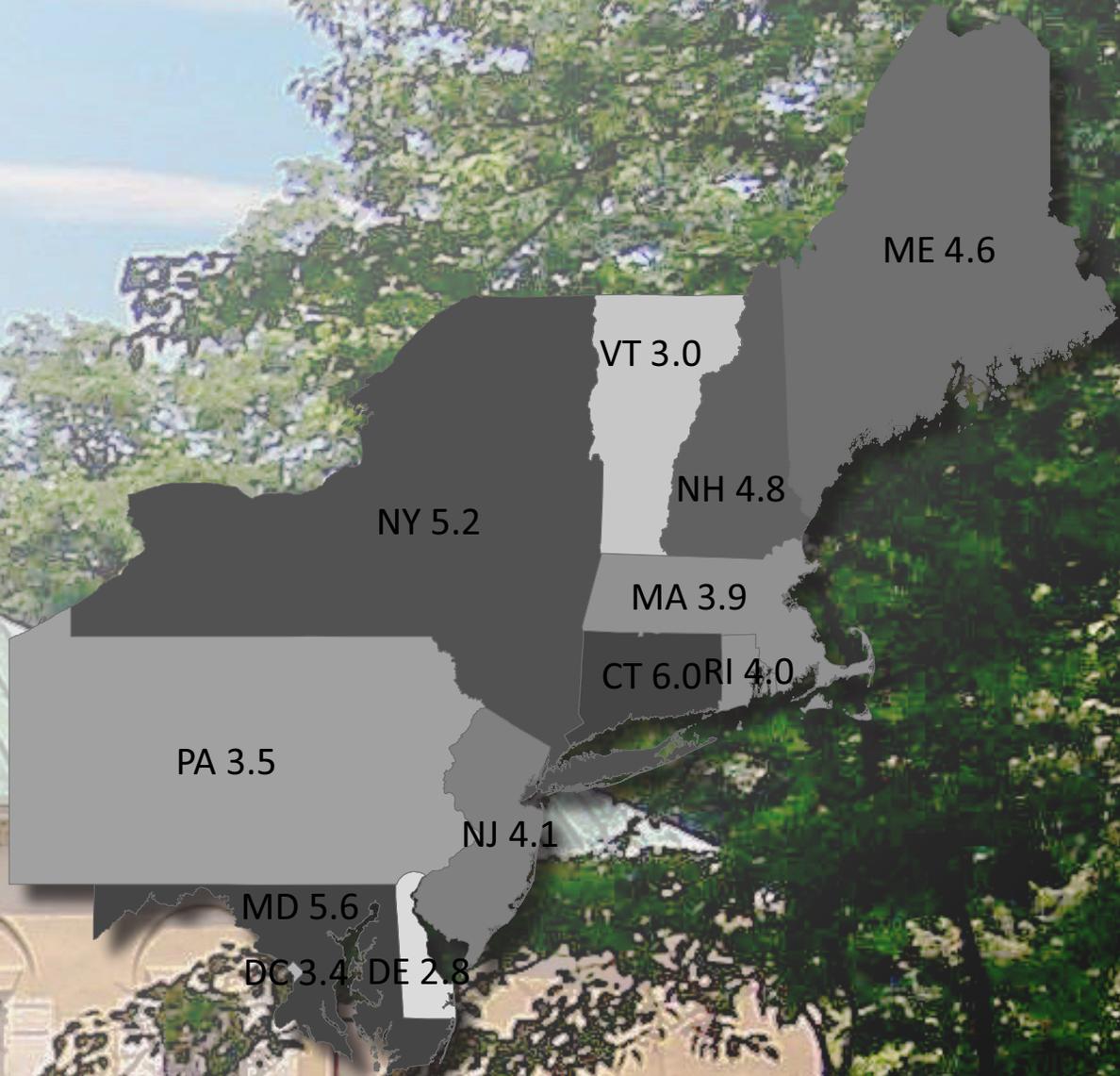


Length of Stay

The map shows the average number of nights of visitors to states in the United States Northeast. The average visitor to New Jersey spent 4.1 nights at their destination. That compared favorably with the average for all United States Northeast destinations (4.3). Connecticut visitors spent the most average nights (6.0), followed by Maryland (5.6) and New York (5.2). The shortest trips were recorded as those to Delaware (2.8) and Vermont (3.0). New Jersey's average length of stay was reduced considerably by the high number of day trip visits (27%) compared to all other United States Northeast destinations (19%). All of that difference was accounted for by the difference in visitors spending 1 to 5 nights, with New Jersey having a lower percentage (52% compared to 62%). Converting day trips into overnight stays could improve the length of stay average for New Jersey visitors.



*Photo courtesy of the
Morris County Tourism Bureau*



Accommodations

The most notable difference in accommodations for New Jersey Visitors compared to visitors to other United States Northeast destinations is the large percentage of visitors staying in casino hotel accommodations for New Jersey visitors (13%). The large concentration of casino hotels in Atlantic City drives this figure in New Jersey. Combining overnight accommodations in casino hotels and non-casino hotels, over one fourth (26%) of the overnight visitors to New Jersey are staying in a hotel. Meanwhile, the map shows the percentage of visitors that are staying with family or friends, a figure that New Jersey visitors rank about the same as the average United States Northeast visitor (42% compared to 43%), but for which differences do exist geographically. Delaware had the highest percentage of visitors staying with family or friends (60%), followed by New Hampshire (53%) and New York (50%). Vermont had the lowest percentage staying with family or friends (26%), followed by Maine (27%).

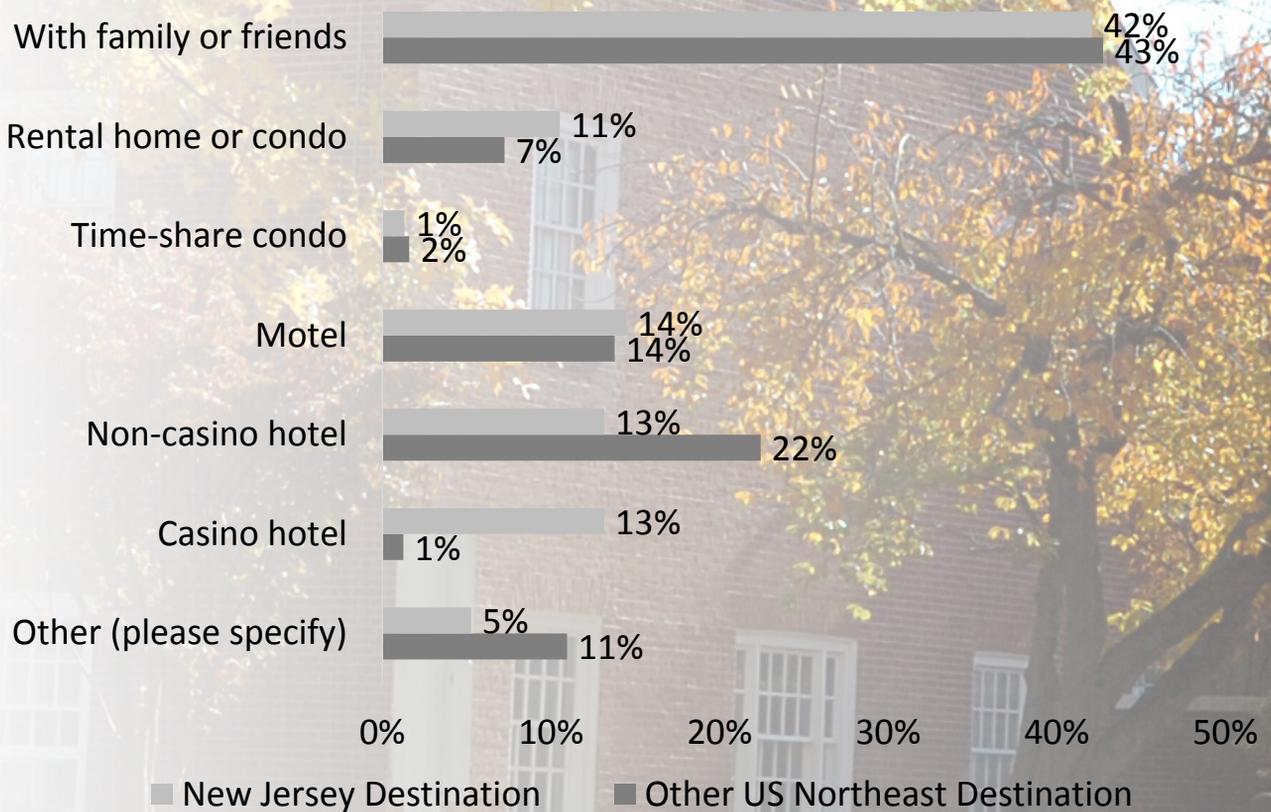
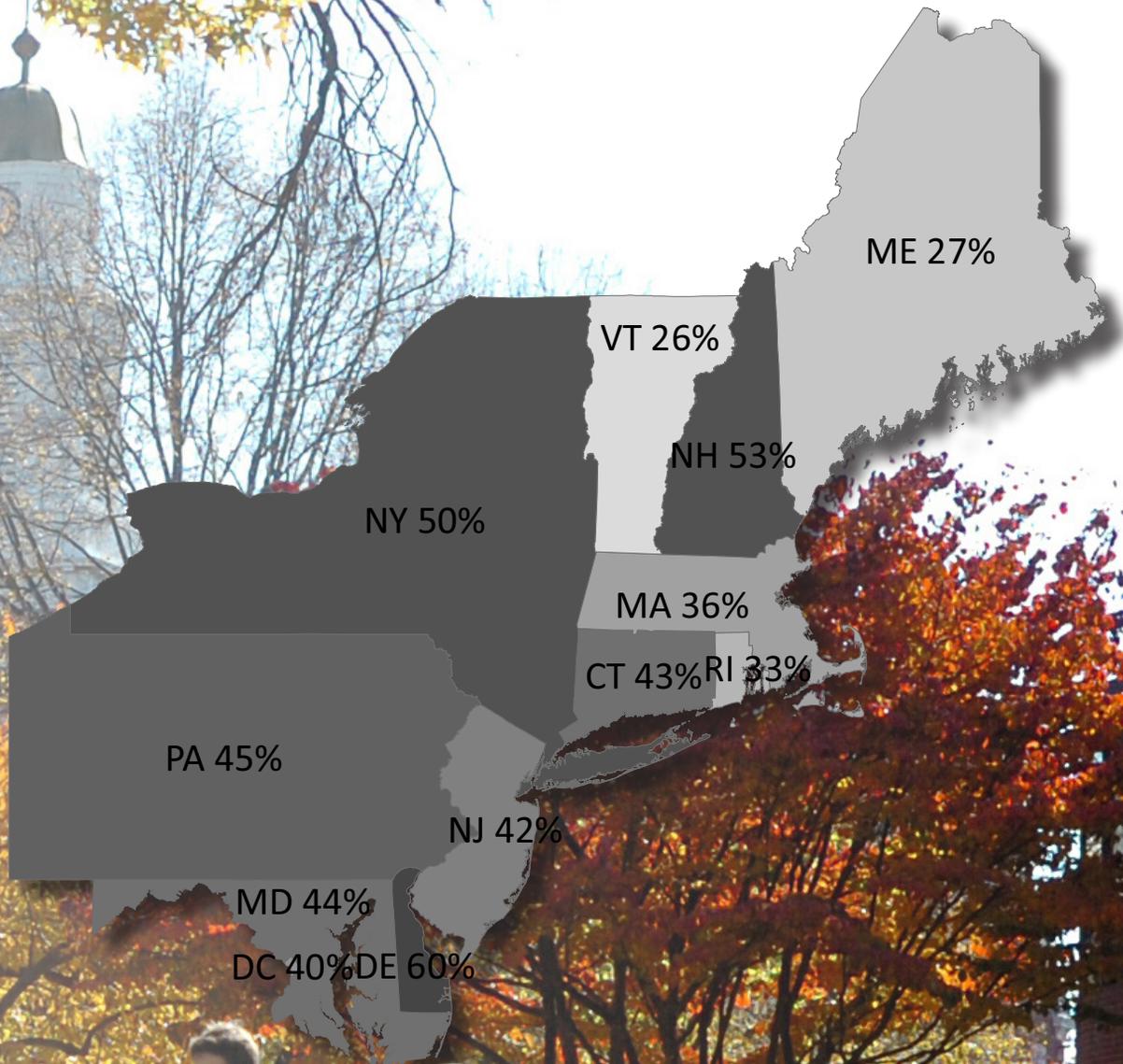


Photo courtesy of the Princeton Regional Convention and Visitors Bureau

Back cover photo courtesy of the Southern Ocean County Chamber of Commerce





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