

A Profile of the Long Beach Island Region Visitor

A study commissioned by the

and conducted by



LLOYD D. LEVENSON INSTITUTE
OF GAMING, HOSPITALITY & TOURISM



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of State, Division of Travel & Tourism

Acknowledgements

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Executive Summary

- A total of 774 respondents from outside of Southern Ocean County responded to the survey. This included 294 intercept-surveys administered over the course of five months throughout the Long Beach Island Region. An additional 480 visitors responded to two identical versions of an online survey. These included 309 respondents to the Southern Ocean County Chamber of Commerce version, and 171 respondents to the Tuckerton Seaport & Baymen's Museum version.
- Intercept surveys were conducted mainly in downtown Tuckerton and Beach Haven. Specifically, several of the festivals visited in the data collection process occurred at Tuckerton Seaport & Baymen's Museum as well as Bayview Park in Beach Haven. Survey Administrators also visited both Bakers Acres and Sea Pirates Campgrounds in Tuckerton and Long Beach Township respectively. Beaches throughout the region were also a frequent source of survey respondents.
- The demographic and socioeconomic characteristics of the LBI Region visitor, exhibit many similarities with the average New Jersey visitor. However, one demographic found to be different from New Jersey was ethnicity, with the visitor population in the LBI Region largely white compared to a slightly more diverse New Jersey visitor. Also, the LBI Region visitor is slightly more educated, with 67% having completed college compared with an average of 63% for the state.
- With respect to the origin of visitors, most are from either the New York or Philadelphia Designated Market Areas (DMA's). Still visitors came from as far afield as Minneapolis, Little Rock and Miami DMA's. Ocean (14%), Bergen (6%), Burlington (6%), Monmouth (4%) and Morris (4%) counties produced the largest share of visitors to the LBI Region, collectively accounting for over one-third of all respondents to the survey. Counties up and down the Interstate 95 corridor, from New York to Philadelphia, produced a significant amount of the visitors.
- Residents of southern Ocean County were thanked for their willingness, but asked not to complete the survey. While some of residents completed the online survey anyway, their answers were not included.

- A combination of factors including: age, household income and whether or not a visitor had children under the age of 18, were utilized to determine a visitors' Lifestage. The resulting categories, which are both collectively exhaustive, and mutually exclusive, include: Young & Free; Young Family; Maturing & Free; Moderate Family; Affluent Family; Moderate Mature; and Affluent Mature.
- The LBI Region has a significantly greater market share of the Affluent Mature Lifestage segment (47%) compared to the average New Jersey visitor (28%). The same is true for comparisons to New Jersey's competitive set and the average US visitor. This important visitor segment has greater disposable time and, importantly, greater disposable income. As Affluent Mature visitors travel more frequently and are likely to spend more when they do, they are an important market segment for the LBI Region and a firm foundation on which to build a stable spending base.
- Similar results emerge when looking at the LBI Region visitor by their Generation. Nearly two-thirds (60%) of the LBI Region visitors were Boomers, a figure that was significantly higher than the state and national average. Visitors belonging to the Gen X generation were slightly more prevalent compared to the state average, but slightly less than the US and competitive set (NC, MD, PA and VA). Conversely, Millennial visitors to the LBI Region were below state and national averages.
- When compared with the average New Jersey visitor, visitors to the LBI Region were more satisfied with their trip, more likely to return to the LBI region and more likely to recommend the LBI Region as a destination to others. Nine out of ten visitors to the LBI Region were very satisfied with their trip, and visitors' comments regarding overall satisfaction with their visit were overwhelmingly positive. "Love," with 37 mentions, was the most commonly used word to describe their experience. "Chowderfest" (32 mentions) was the second.
- The average party size for a LBI Region visitor is much higher than that of the average New Jersey visitor. Nearly a third of LBI Region visitors were traveling in a party of five or more people. That figure is nearly three times the state average (11%) for parties of this size. Indeed, visitors traveling with four people to the LBI Region represented another 19%, also ranking favorably when compared to the average New Jersey visitor (13%). Family Lifestage segments: Young Family (5.8), Moderate Family (5.4), and Affluent Family (5.4), accounted for the largest party sizes. Over half of respondents noted they were traveling with their spouse (53%), children (39%) and other family (28%).
- When asked about their travel expenses, 27 percent of overnight visitors said they spent more than \$150 per day on lodging. By Lifestage, Young Families (\$116), Young & Free (\$110) and Affluent Families (\$95) spent the most on lodging. By generation, Gen X'ers (\$93) and Millennials (\$90) spent the most. Young Families (\$101) and Millennials spent more on shopping per day than other groups. Nearly one-fourth of LBI Region visitors spent more than \$100 per day on food and beverage. Gen X'ers (\$80 per day) spent more than any other group on food and beverage.
- Comparing mainland to island visitors by Lifestage, the two groups of LBI Region visitors are remarkably similar. There were slightly more Affluent Mature visiting the mainland as their primary destination (50%) compared with those primarily visiting the island (45%). Conversely, there were slightly more Affluent Families visiting the island (19%) as their primary destination compared to the mainland (15%). The Silent/GI Generation made up a larger percent of the primarily mainland visitors (10%) compared to those primarily visiting the island (3%). Boomers made up a slightly larger percentage of visitors to the island (61%) compared with the mainland (57%).
- More than 4 in 10 visitors were staying in a personal second home while visiting overnight in the LBI Region. Rentals (23%) comprised the next largest category, with rentals through a real estate agent (14%) comprising nearly two-thirds of this market, and rentals through a shared service like Airbnb (9%) comprising the remaining.

Table of Contents

Executive Summary.....	(ii)
Table of Figures.....	(iv)
Introduction.....	(1)
Methodology.....	(1)
Demographic, Geographic and Socioeconomic Characteristics.....	(2)
- Education, Ethnicity, Marital Status and Gender.....	(3)
- Visitor Origins.....	(4)
- Lifestage.....	(6)
- Generations.....	(8)
Behavioral and Psychographic Characteristics.....	(10)
- Visitor Related Behavioral and Psychographic Characteristics.....	(10)
- Previous Visitation.....	(10)
- Party Size and Composition.....	(12)
- Mode of Transportation.....	(14)
- Satisfaction Levels.....	(15)
- Return/Recommendation Ratings.....	(15)
- Trip Related Behavioral Characteristics.....	(18)
- Source of Information.....	(18)
- Trip Purpose.....	(18)
Comparing Mainland and Island Visitors.....	(22)
- Length of Stay.....	(22)
-Expenditures.....	(27)
-FoodandBeverage.....	(24)
-Entertainment.....	(24)
-Lodging.....	(25)
-Shopping.....	(25)
-Transportation.....	(25)
-Lifestage.....	(26)
-Generations.....	(27)
-Lifestage by Mainland/Island.....	(27)
-Generations by Mainland/Island.....	(27)
Accommodations.....	(27)
Visitor Origins by Mainland/Island.....	(28)
Survey Instrument.....	(30)

Table of Figures

Figure 1: Survey Respondents by Survey Location.....	(1)
Figure 2: LBI Region and New Jersey Visitor Education Levels.....	(2)
Figure 3: LBI Region and New Jersey Visitor Ethnicity.....	(2)
Figure 4: LBI Region Visitor Marital Status.....	(3)
Figure 5: LBI Region Visitor Gender.....	(3)
Figure 6: LBI Region Visitor Origins by DMA, Focus on Boston to Atlanta.....	(4)
Figure 7: LBI Region Visitor by Origins County, Focus on Fairfield, CT to Fairfax, VA.....	(5)
Figure 8: Explanation of (Modified) Lifestage.....	(6)
Figure 9: LBI Region Visitors by Lifestage.....	(6)
Figure 10: LBI Region Visitors by Lifestage Compared to New Jersey (Overnight and Day Trips).....	(7)
Figure 11: LBI Region (Labeled), New Jersey, Competitive Set and the United States Overnight Leisure Visitors by Lifestage.....	(7)
Figure 12: Explanation of Generations.....	(8)
Figure 13: LBI Region Visitors by Generations.....	(8)
Figure 14: LBI Region Visitors by Generations Compared to New Jersey (Overnight and Day Trips).....	(9)
Figure 15: LBI Region (Labeled), New Jersey, New Jersey's Competitive Set and the United States Overnight Leisure Visitors by Generations.....	(9)
Figure 16: LBI Region Visitors by Number of Previous Visits.....	(10)
Figure 17: LBI Region Visitors by Number of Previous Visits and Lifestage.....	(11)
Figure 18: LBI Region Visitors by Number of Previous Visits and Generations.....	(11)
Figure 19: LBI Region and New Jersey Visitor Party Size.....	(12)
Figure 20: LBI Region Visitor Party Size by Lifestage.....	(12)
Figure 21: LBI Region Visitor Party Size by Generations.....	(13)
Figure 22: LBI Region Visitor Party Composition.....	(13)
Figure 23: LBI Region Visitor Mode of Transportation.....	(14)
Figure 24: LBI Region Visitor Mode of Transportation Within LBI Region.....	(14)
Figure 25: LBI Region Visitor Satisfaction Levels.....	(15)
Figure 26: LBI Region Visitor Return Intention.....	(15)
Figure 27: LBI Region Visitor Recommendation Intentions.....	(16)
Figure 28: LBI Region Visitor Positive Comments from Visitors Expressing Satisfaction with Their Trip.....	(17)
Figure 29: LBI Region Visitor Sources of Information.....	(18)
Figure 30: LBI Region Visitor Primary Trip Purposes.....	(18)
Figure 31: LBI Region and New Jersey Visitor Primary Trip Purposes.....	(19)
Figure 32: LBI Region Visitor Secondary Trip Purposes.....	(19)
Figure 33: LBI Region Visitor Primary Trip Purpose by Lifestage.....	(20)
Figure 34: LBI Region Visitor Secondary Trip Purpose by Lifestage.....	(20)

Figure 35: LBI Region Visitor Primary Trip Purpose by Generations.....(21)

Figure 36: LBI Region Visitor Secondary Trip Purpose by Generations.....(21)

Figure 37: Primary Destination within the LBI Region.....(22)

Figure 38: LBI Region and New Jersey Visitor Length of Stay with Detail on Mainland and Island Visitors.....(22)

Figure 39: LBI Region Visitor Average Length of Stay by Lifestage with Detail on Mainland and Island Visitors.....(23)

Figure 40: LBI Region Visitor Average Length of Stay by Generations with Detail on Mainland and Island Visitors.....(23)

Figure 41: LBI Region Visitor Food and Beverage Expenditures with Detail on Mainland and Island Visitors.....(24)

Figure 42: LBI Region Visitor Entertainment Expenditures with Detail on Mainland and Island Visitors.....(24)

Figure 43: LBI Region Visitor Lodging Expenditures with Detail on Overnight and Mainland and Island Visitors.....(25)

Figure 44: LBI Region Visitor Shopping Expenditures with Detail on Mainland and Island Visitors.....(25)

Figure 45: LBI Region Visitor Transportation Expenditures with Detail Mainland and Island Visitors.....(26)

Figure 46: LBI Region Visitor Expenditures by Lifestage.....(26)

Figure 47: LBI Region Visitor Expenditures by Generations.....(27)

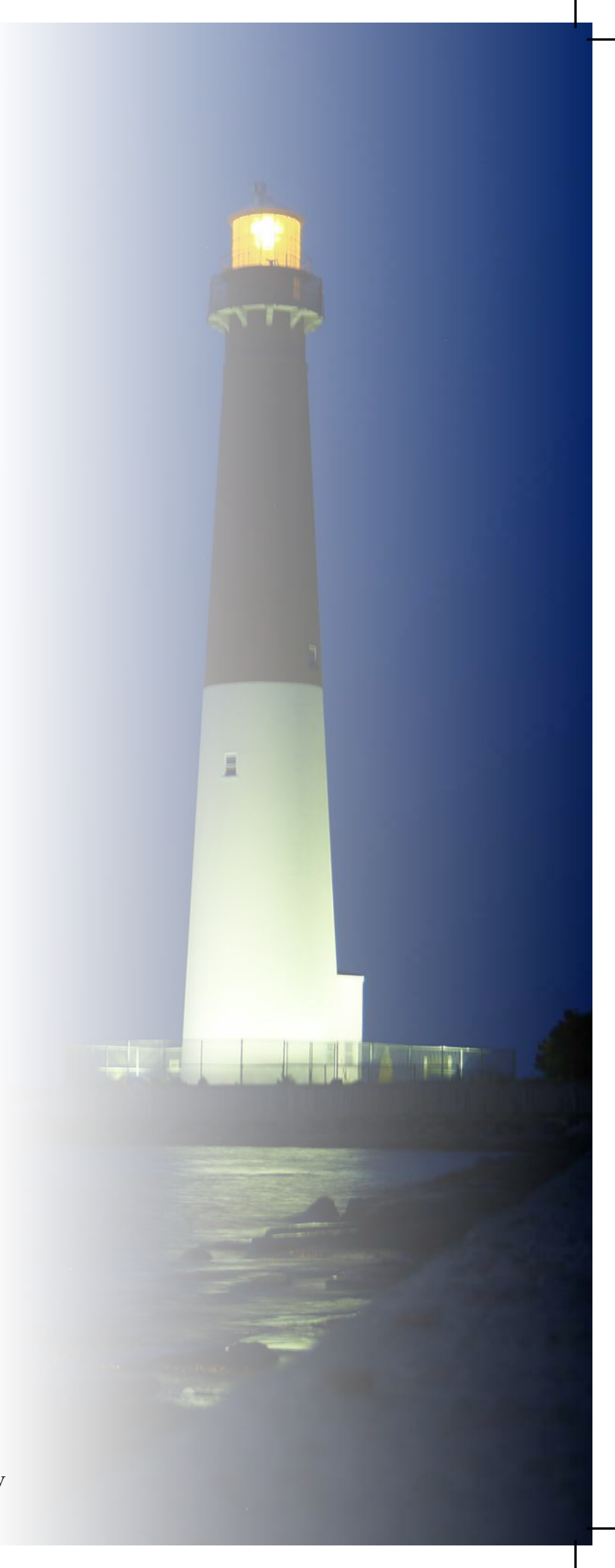
Figure 48: LBI Region Comparison of Mainland and Island Visitors by Lifestage.....(27)

Figure 49: LBI Region Comparison of Mainland and Island Visitors by Generation.....(28)

Figure 50: LBI Region Comparison of Mainland and Island Visitors by Accommodation Type.....(28)

Figure 51: LBI Region Mainland Visitor Origins by County, Focus on Fairfield CT to Fairfax VA.....(29)

Figure 52: LBI Region Island Visitor Origins by County, Focus on Fairfield CT to Fairfax VA.....(29)



Introduction

The Southern Ocean County Chamber of Commerce and Stockton University collaborated to develop, administer and analyze the results of a survey exploring the profile of visitors to the Long Beach Island Region (LBI Region) for a five-month period beginning in June of 2017. Specific goals of this survey included determining the LBI Region visitors' geographic, demographic and psychographic characteristics. In accomplishing this, researchers would also ascertain the travelers' mode of travel, duration of travel, and expenditure. The full survey is available at the end of this report in Appendix A. The results, detailed in the following pages, provide information that will assist in the destination marketing efforts of the chamber.

The organization of the report is as follows: first, a description of the methodology employed in the study then, a discussion of the general demographic, geographic and socioeconomic characteristics of the LBI Region visitor. This includes discussions of both the visitors' Lifestage and Generation. Following this, an exploration of the behavioral and psychographic, and then trip related characteristics, of the LBI Region visitor. Attention is given to the difference between the mainland and island visitors to the LBI Region. Expenditures are examined not only by their category of spending, but also by primary destination within the LBI Region, Lifestage and Generation. The report concludes with recommendations for the Southern Ocean County Chamber of Commerce, which will be of assistance to the Chamber's continued marketing efforts.



The Southern Ocean County Chamber of Commerce is an Accredited Destination Marketing Organization

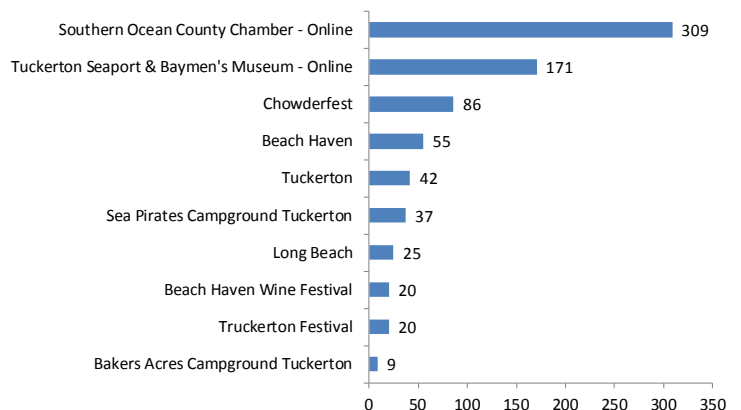
Methodology

The administration of the survey required a multi-pronged approach, including not only intercept surveys to be conducted in the field, but also an on-line survey. The accompanying on-line survey was sent to e-mail addresses supplied by the Southern Ocean County Chamber of Commerce. Additional responses were derived from the New Jersey Visitor Profile Studies (NJVPS) conducted by the Lloyd D. Levenson Institute of Gaming, Hospitality and Tourism in February of 2013 and 2014, and the New Jersey Division of Travel and Tourism (conducted by DK Shifflet). These surveys included similar questions utilized in this, the Southern Ocean County Chamber of Commerce visitor profile study.

Figure 1 shows the location of the surveys. 774 usable surveys were completed. The intercept surveys were conducted mainly in downtown Tuckerton and Beach Haven. Specifically, several of the festivals visited in the data collection process occurred at Tuckerton Seaport & Baymen's Museum, in Tuckerton, as well as Bayview Park in Beach Haven. Survey administrators also visited both Bakers Acres and Sea Pirates Campgrounds in Tuckerton, as well as Long Beach Township. Beaches throughout the region were also a frequent source of survey respondents.

The survey instrument itself was developed, in particular, to be able to ascertain a visitor's Lifestage, explained in more detail in the next section. Researchers worked with the Southern Ocean County Chamber of

Figure 1: Survey Respondents by Survey Location



Demographic, Geographic and Socioeconomic Characteristics

Commerce on refining the survey instrument. It is well documented in the tourism literature that a visitor's Lifestage, a combination of age, income and family status, plays a significant role in the travel choices of individuals. Lifestage will thus play a significant role in the analysis of the data. Similarly, an individual's birth year and subsequent classification with regard to "Generations" (i.e. Millennials, Gen X'ers, Boomers, etc.) will be a focus of this report. Both are explained in detail in the following sections.

Comparisons will be drawn with the average New Jersey visitor profile. In order to accomplish this, two separate studies are referenced throughout this report: the 2016 New Jersey Visitor Profile, conducted by DK Shifflet for the New Jersey Division of Travel and Tourism; and the 2013 and the 2014 Survey to Improve the Effectiveness of Tourism Promotion: New Jersey Visitor Profile Studies, conducted by Brian J. Tyrrell, Ph.D. for the Lloyd D. Levenson Institute of Gaming, Hospitality and Tourism at Stockton University.

The DK Shifflet study, focuses only on the overnight visitor to New Jersey, and thusly will be used only when an overnight comparison is necessary. All other references to the average "New Jersey" visitor would be making comparisons using the Tyrrell (2013) study, which included both day trip and overnight visitors.

Finally, this report will show differences between those visitors whose primary destination is the mainland or island.

To begin describing the visitor to the LBI Region the report will first introduce the reader to some general demographic characteristics of the LBI Region visitor. The average visitor's education, ethnicity, marital status and gender will be briefly introduced. A more detailed description is provided regarding the origin of visitors to the LBI Region. Finally, visitors will be described by Lifestage and Generation.

Education

Figure 2 through Figure 5 show, respectively, the education levels, ethnicity, marital status and gender of visitors to the LBI Region. Two-thirds (67%) of respondents had achieved at least a college degree. All visitors had, at the minimum, their high school diploma. The number of college graduates compares favorably to the New Jersey visitor average of 63%. Figure 2 shows the full detail on education levels of the LBI Region visitors compared with the average New Jersey visitor.

Race/Ethnicity

Nearly 99% of visitors to the LBI Region identified themselves as white, a figure well above the state average (81%). The LBI Region is drawing a below average share of African American (0%), Latino (1%) and Asian (0%) visitors compared to the state averages (6%, 5% and 3% respectively). Figure 3 provides the comparison of the ethnicity of the LBI Region visitors relative to New Jersey visitors in general.

Figure 2: LBI Region and New Jersey Visitor Education Levels

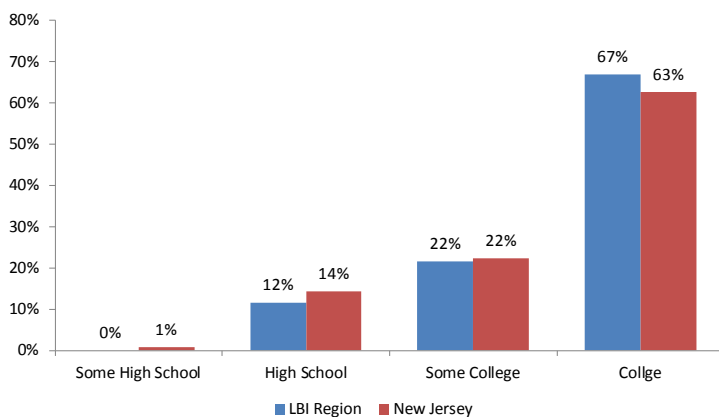
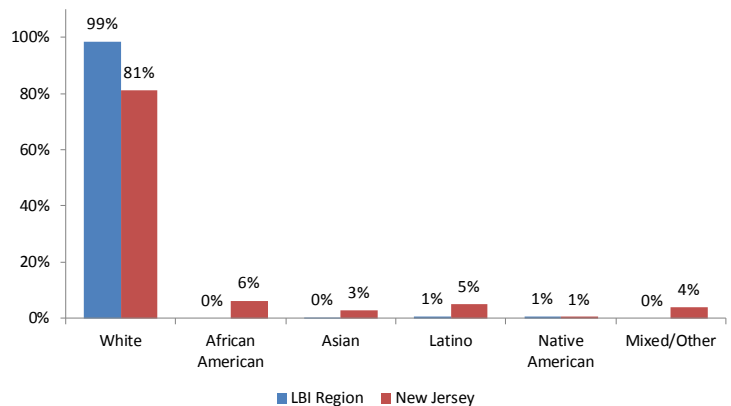
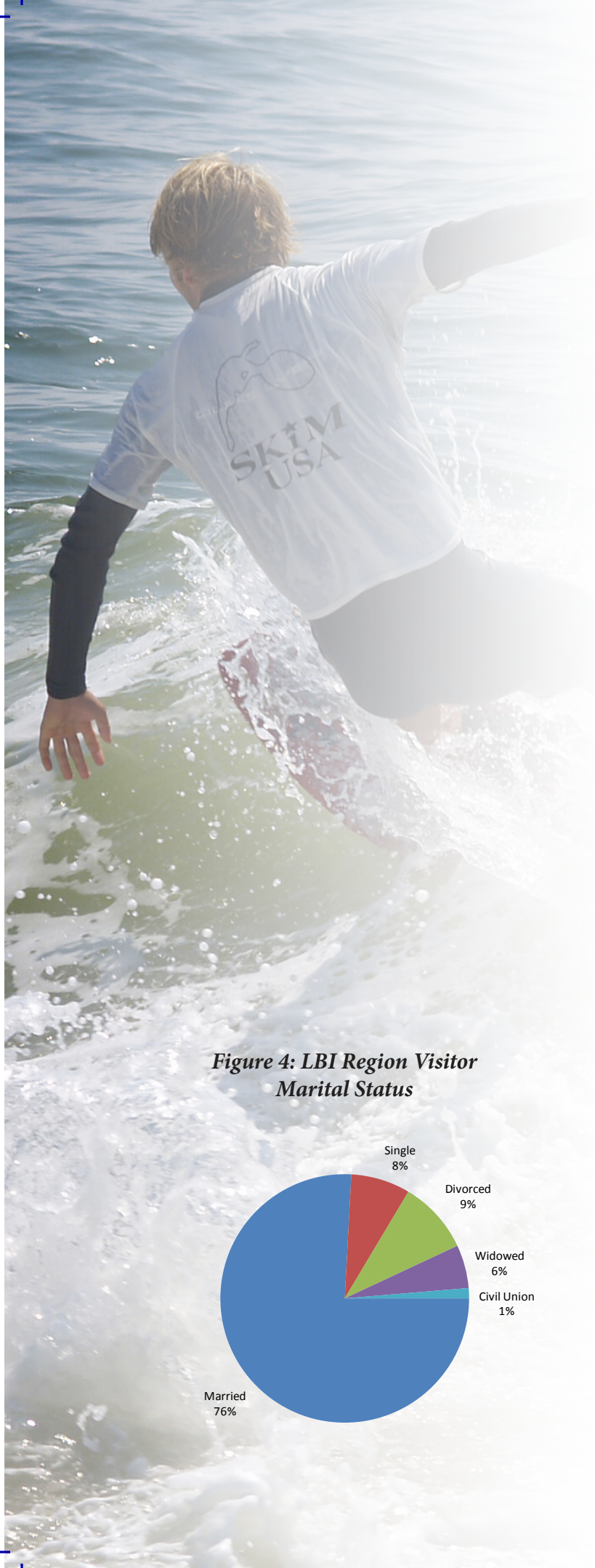


Figure 3: LBI Region and New Jersey Visitor Ethnicity





Marital Status

Over three-fourths (76%) of the LBI Region Visitors are married and only one in twelve (8%) identified themselves as single. As many of the analyses in the remainder of the report will support, the LBI Region is drawing in families.

Gender

While over two-thirds (72%) of the respondents to the survey were female, the findings do not suggest that is a reflection of the average visitor in the LBI Region. Indeed, as the report will later reveal, most of these respondents were traveling in relatively large party sizes, and many included a spouse and or extended relatives, many of which are undoubtedly male. It is more likely that female visitors were somewhat more willing to take the survey than their male counterparts.



Figure 4: LBI Region Visitor Marital Status

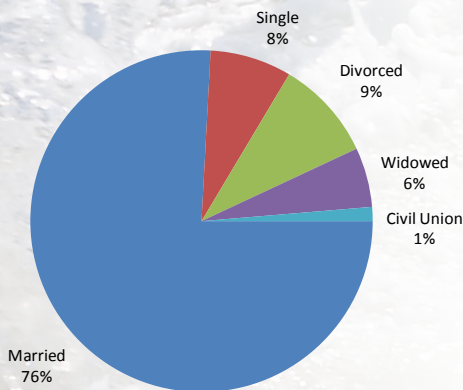
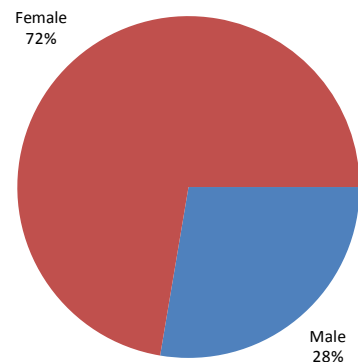


Figure 5: LBI Region Respondent Visitor Gender



Visitor Origins

With respect to the origin of visitors, respondents were asked to supply their zip-code. That information is then translated into County and Designated Market Areas (DMA's). DMA's are synonymous with Areas of Dominant Influence (ADI) and Metropolitan Statistical Areas (MSA's). It can be thought of as what metropolitan nightly news a county receives. Locally Ocean County residents receive news out of New York, whereas just south in Atlantic County they receive the Philadelphia broadcast. Residents of southern Ocean County were thanked for their willingness, but asked not to complete the survey. While a number of these individuals completed the online survey anyway, their answers were not included.

Figure 6 details the visitor origin by DMA. The majority of LBI Region visitors originated from either the New York (51%) or Philadelphia (25%) DMA's. However, nearly one-fourth of visitors to the LBI Region originated from areas outside of the two most immediate DMA's. Of the remaining DMA's, Harrisburg (1%), Wilkes Barre (1%) and Baltimore (1%) might offer the most potential for possibly expanding the market, despite their small size relative to the New York and Philadelphia DMA markets. Interestingly, respondents visited from as far afield as Minneapolis, Little Rock and Miami DMA's (not pictured in Figure 6).

Figure 6: LBI Region Visitor Origins by DMA, Focus on Boston to Atlanta

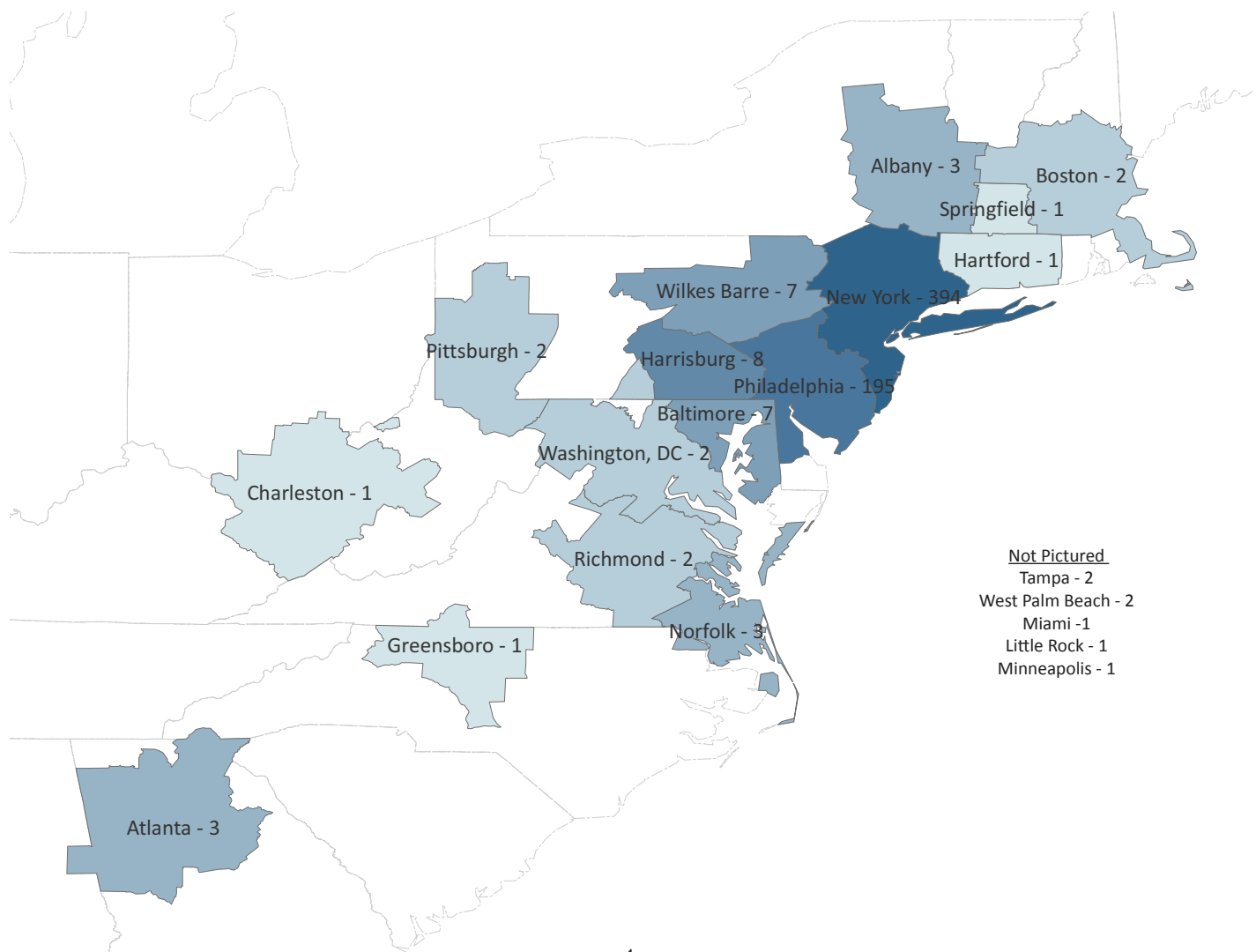
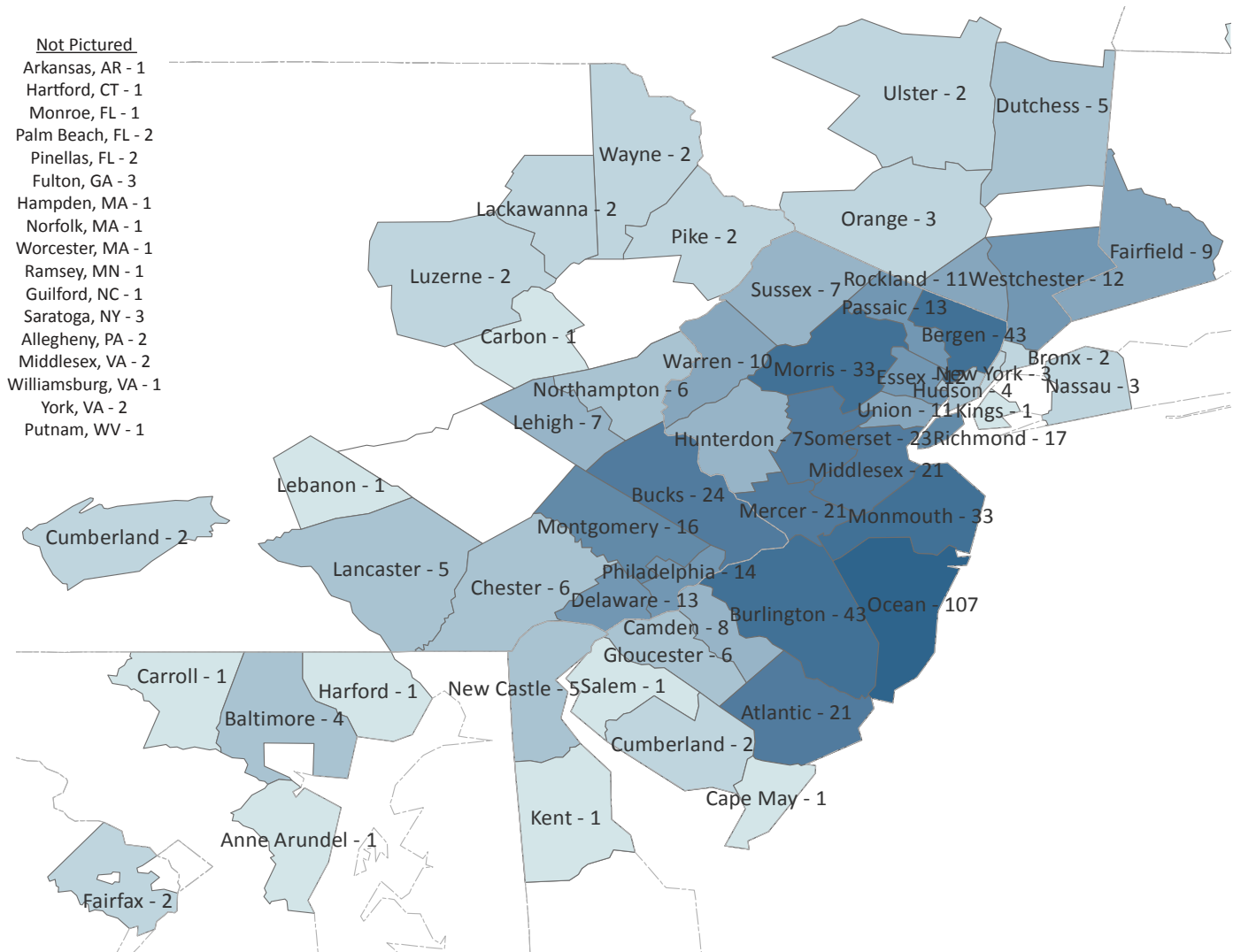




Figure 7 shows the LBI Region visitor origins by county, with a focus on the region between Fairfield, Connecticut and Fairfax, Virginia. Ocean (14%), Bergen (6%), Burlington (6%), Monmouth (4%), and Morris (4%) counties produced the largest share of visitors to the LBI Region, collectively accounting for over one-third of all respondents to the survey. Counties up and down the Interstate 95 corridor, from New York to Philadelphia, produced a significant amount of the visitors. Not shown are counties in North Carolina, Georgia, Florida and Virginia (other than Fairfax) in the south, New England counties (other than Fairfield, Connecticut, and counties in Arkansas, Minnesota and western Pennsylvania to the west.

Figure 7: LBI Region Visitor Origins by County, Focus on Fairfield CT to Fairfax VA



Lifestage

A visitors Lifestage (family life cycle) plays an important role in a visitors intention to travel to any particular destination. Lifestage combines a visitor’s age, income and family status to form segments of tourists that display common patterns of behavior, both from their travel patterns as well as their media habits. Figure 8 explains the classifications used in developing these Lifestage segments. Lifestage comparisons are useful in media targeting.

With that in mind, the survey instrument was developed in such a manner as to be able to ascertain the visitors Lifestage. However, notably, this survey uses a higher income level in defining the difference between Affluent and Moderate Mature segments. The present study does not define an individual as Affluent Mature until they reach the \$75,000 household income, whereas DK Shifflet (2016) uses a \$60,000 value.

Still, showing the results by Lifestage will allow us to convey information in a manner consistent with the New Jersey Division of Travel and Tourism’s Overnight Leisure Visitor Profile Study with perhaps the small caveat that our Affluent Mature segment is slightly more restrictive. It is also important to keep in mind that the Shifflet report looked at overnight visitors only; direct comparisons will be made with the LBI Region overnight segment visitors (73%) who responded to the survey.

Meanwhile, the 2013 and 2014 New Jersey Visitor Profile Studies that were conducted by the Lloyd D. Levenson Institute of Gaming, Hospitality and Tourism (LIGHT) will be used for comparison purposes when the entirety of the sample is discussed. Here, the cutoff level for Affluent Mature household income (\$75,000) is the same as in the present study. This value better reflects the income needed to be considered affluent in the feeder markets for the LBI Region. The LIGHT data will be utilized when making comparisons to the state average for combined overnight and day trip visitors to the LBI Region.

The most significant Lifestage segment of visitors to the LBI Region was found to be Affluent Mature visitors (47%) (see Figure 9). That is followed in order of size of the LBI Region market with Affluent Families (17%), Moderate Matures (14%) and the Maturing and Free (11%). All other Lifestage segments comprised less than half of the LBI Region’s market, including Young Families (6%), Moderate Families (4%) and the Young and Free (1%).

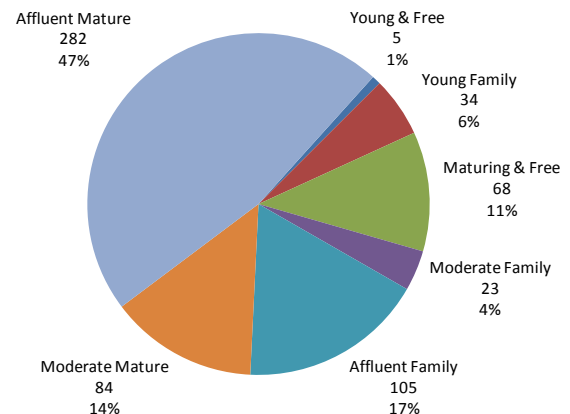
“I love the island, people, views, dining and shopping and outdoor activities.”

Visitor - Westchester, NY

Figure 8: Explanation of (Modified) Lifestage

<u>Lifestage</u>	<u>Age</u>	<u>Household Income</u>	<u>Children</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

Figure 9: LBI Region Visitors by Lifestage



The LBI Region (47%) has a significantly greater market share of the Affluent Mature Lifestage segment compared to the average New Jersey (28%) visitor (see Figure 10).

The same is true when comparing the Lifestage composition of only overnight visitors to New Jersey’s competitive set and the average US visitor (see Figure 11). The Affluent Mature visitor segment has greater disposable time and, importantly, greater disposable income. This is a firm foundation on which to build a stable spending base that both travels more frequently and spends more when they do. Continuing to provide excellent service to this important segment will be key to the future.

The competitive set in Figure 11 is the state of New Jersey’s competitive set, which includes New York, Pennsylvania, Maryland, Virginia and North Carolina. It is important also to emphasize that Figure 11 shows only those overnight visitors to the study, or 73% of the total sample.

Again, because the state’s study only examines overnight visitation, comparison of Lifestage (and Generations) is restricted to this sub-sample. Here, it is clear LBI Region is attracting a much greater proportion of both Affluent Mature and Affluent Family visitors compared with all other comparative geographies. This is very good news for the LBI Region as these two Lifestage segments, as previously mentioned, account for visitors with higher disposable income and time. Perhaps the only area of

concern might be that the LBI Region is not currently attracting a comparatively large percentage of Young and Free, Young Family, and Maturing and Free visitors when compared to New Jersey, its competitive set, or the United States.

Lifestage analysis is also utilized later in this report to examine expenditures, previous visitation, length of stay, primary and secondary trip purpose. The various Lifestage proportion of the markets are also shown by the visitors primary destination, be it mainland or island. All of this information is contained in the relevant sections where those variables are analyzed.

“It’s a beautiful area, with great restaurants, and lots of fun activities for the kids.”

Visitor - Princeton, NJ

Figure 10: LBI Region Visitors by Lifestage Compared to New Jersey (Overnight and Day Trips)

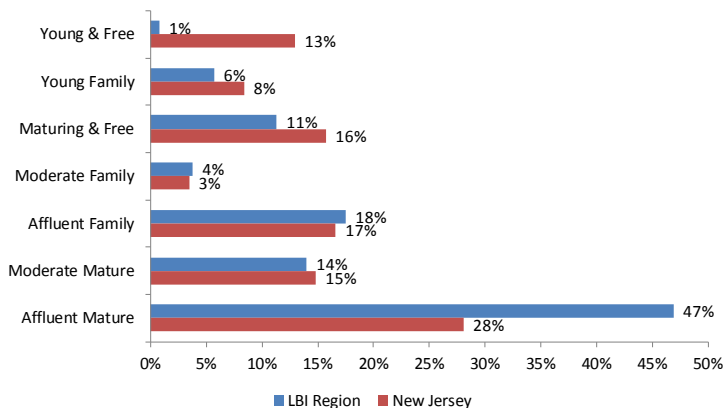
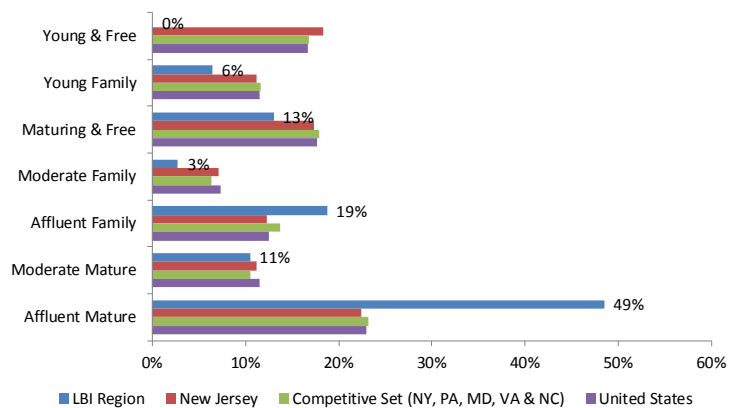


Figure 11: LBI Region (Labeled), NJ, Competitive Set and the US Overnight Leisure Visitors by Lifestage



Generations

Examining the responses by Generations, one only considers the visitor's age in determining which of the four Generations a visitor would be categorized as (see Figure 12). Millennials, the youngest of these Generation segments, were born after 1980 and are presently 18-36 years of age. Gen X'ers occupy the second youngest segment at ages 37-52. Boomers presently are 53-71 years of age, importantly overlapping both the Mature and Maturing/Family segments in the previous Lifestage analysis by a span of 2 years (53-54). Finally, the GI Generation (birth year before 1925), often referred to as the Greatest Generation, have been included with the Silent Generation for this study, and identified as the Silent/GI Generation accordingly.

Similar results are revealed when looking at the LBI Region visitor by their Generation as was found when looking at visitors by their Lifestage. Nearly two-thirds (60%) of the LBI Region visitors were Boomers. Gen X'ers represented over one-fourth of the sample (27%). Combined, the Millennials (8%) and the Silent/GI (5%) Generations represented about one-eighth of the sample.

The Boomers are an important consumer segment, not only because there are a lot of them, but because of where they are in the earning stage of their lives. Similar to the large percentage of Affluent Matures, all but a handful of the Boomers are in one of two Mature Lifestage categories (two years' worth, mentioned above).

Meanwhile the Millennials Generation also boasts a large population. Many of the respondents mentioned they were traveling with children and other family members. Undoubtedly, several of these visitors are Millennials, who will one day comprise a larger share of the LBI Region as they themselves move through the stages of the family life cycle. It will be important to the LBI Region to draw this generation in early, as they continue to welcome families to the area.

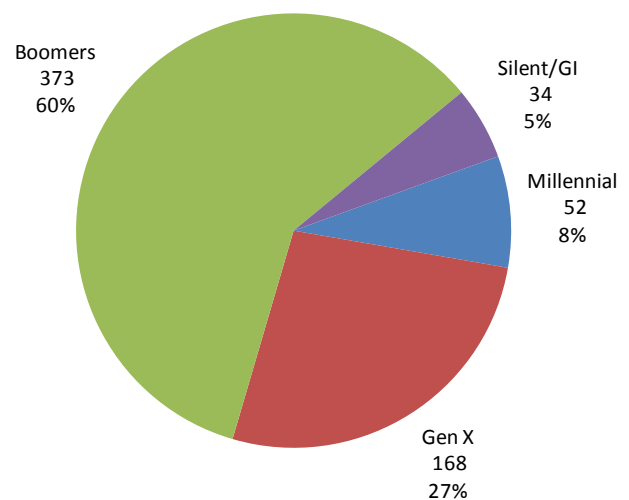
Visitors to the LBI Region classified as Boomers comprised a significantly higher percentage of the LBI Region market (60%) than the average visitor to the state of New Jersey (43%) (see Figure 14). Gen X Generation visitors comprised 27% of the LBI Region visitor market, compared to 20% for the state of New Jersey. The LBI Region visitor was less likely to be in the Millennial (8%) compared to the New Jersey average of (28%) and Silent/GI (5% compared to 10%) Generations.



Figure 12: Explanation of Generations

<u>Generations</u>	<u>Birth Year</u>	<u>Age</u>
Silent/GI	Before 1945	72 or Older
Boomers	1946-1964	53-71
Gen X	1965-1980	37-52
Millennial	1981 or Later	18-36

Figure 13: LBI Region Visitors by Generations



Describing the overnight visitor to the LBI Region is accomplished by examining the 73% overnight visitors that responded to the survey. This will allow comparison with overnight visitors to New Jersey, the New Jersey competitive set and the United States that is available in the New Jersey Division of Travel and Tourism Overnight Leisure Visitor Profile Study conducted by DK Shifflet. The comparison reveals some similarities with respect to the distribution (see Figure 14), of course not without some unique differences for the LBI Region visitor.

Whereas Figure 14 shows the average LBI Region visitor for both overnight and day trips, Figure 15 shows just the overnight visitors to the LBI Region in comparison with state, competitive set and national averages.

Once again the LBI Region fares very well regarding the percent of the market in the Boomer Generation (58%), nearly doubling the national average (34%). The percentage of the overnight market comprised of the Gen X Generation (28%) was also higher than the state average (20%), but similar to the competitive set (28%) and national average (29%).

Conversely, Millennial overnight visitors (8%) to the LBI Region were below state (28%), competitive set (28%), and national averages (29%). While the greater share of Boomers likely means a more affluent visitor with greater means, it is important to keep successive generations cultivated and, unlike in the Lifestage analysis above, the examination of segments by age only might suggest

that greater efforts could be made to reach this younger demographic. The lower volume of overnight visitors for the Young Family Lifestage segment likely accounts for much of the lower representation of these Millennials.

“I’ve been going to LBI for years and just love it! My husband loves the fishing.”

Visitor - Coopersburg, PA

Figure 14: LBI Region Visitors by Generations Compared to New Jersey (Overnight and Day Trips)

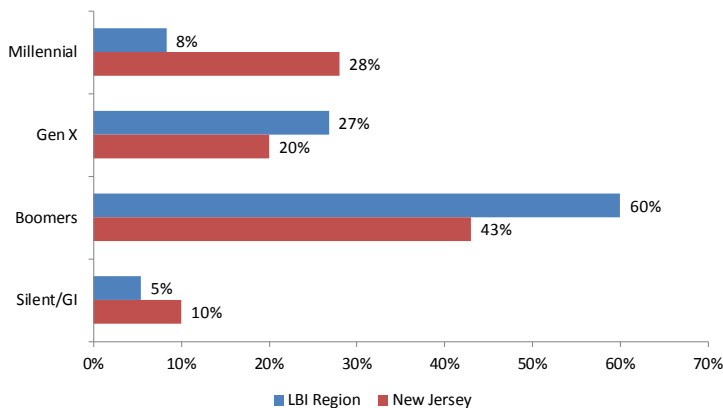
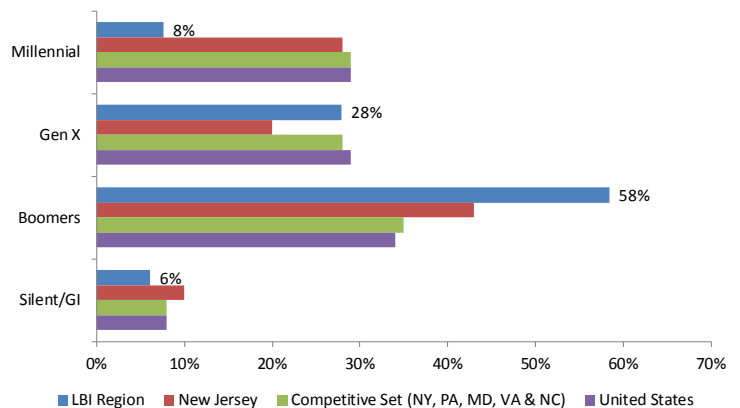


Figure 15: LBI Region (Labeled), NJ, Competitive Set and the US Overnight Leisure Visitors by Generations



Behavioral and Psychographic Characteristics

This section will take a closer look at some of the behavioral and psychographic characteristics of the LBI Region visitor. The analysis is divided into two parts, visitor and trip related characteristics. The division allows for a better examination of the segments based on the average LBI Region visitor in the first part (visitor related), while then showing how the specific trip that visitor is on (trip related).

Visitor Related Characteristics

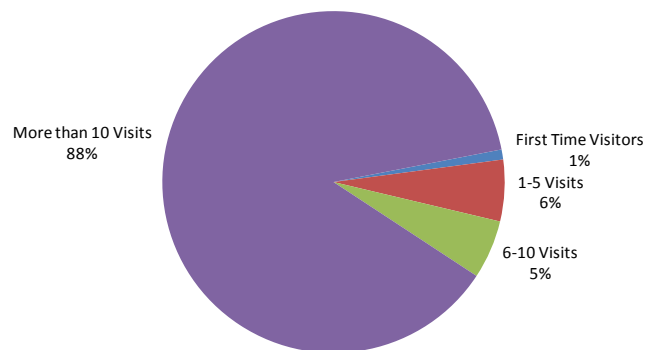
Lifestage and Generations are critical segmentation variables by which to describe the travel characteristics of the LBI Region visitor. The following sections will first present the composition of each travel characteristic by all LBI Region visitors, before detailing how each Lifestage and Generation for the LBI Region visitor varies with respect to their travel. The Lifestage and Generation figures will show not only the percentage within any particular segment, but also the absolute number of LBI Region visitors within that segment. This is important because segmenting the 774 LBI Region visitors into such discrete segments can often result in averages that are based on just a few individuals. In the present study, recall that there were very few Young and Free and Young Family Lifestage visitors. Thus, caution is recommended when trying to define the specific travel characteristics exhibited by Young Family visitors to the LBI Region. The analysis begins with a discussion of previous visitation of the LBI Region visitor.

Previous Visitation

Figure 16 shows the percentage of visitors who were first time or repeat visitors, indicating the number of previous visits the respondent had been to any destination in the LBI Region. An incredibly high number (88%) of LBI Region visitors had previously visited the area on more than 10 previous occasions. An additional 5% had visited between 6 and 10 visits to the LBI Region, and 6% had previously visited between 1 and 5 times. Only 1% of those sampled noted they were first time visitors.



Figure 16: LBI Region Visitors by Number of Previous Visits



It is encouraging that, when looking at previous visitation by Lifestage, first time visitors are being cultivated in the youngest of Lifestages (see Figure 17), though the sample sizes within these younger generations are small so caution is encouraged in interpreting the results. A clear pattern of respondents having visited more than 10 previous occasions is apparent across all Lifestage segments.

The same pattern holds true when examining the LBI Region visitor by number of previous visits and Generations (see Figure 18). All Generations had vast majorities of visitors having visited more than 10 previous times.

“LBI is always warm, welcoming and clean. Plenty to do for a wide variety of age groups. Delicious restaurants and bars are always fun.”

Visitor - Washington Township, NJ

Figure 17: LBI Region Visitors by Number of Previous Visits and Lifestage

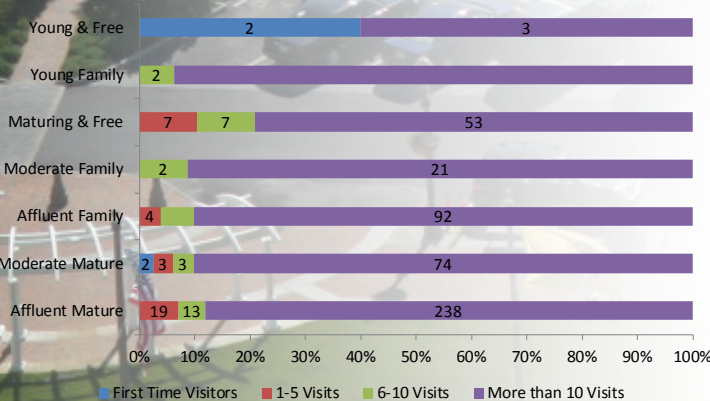
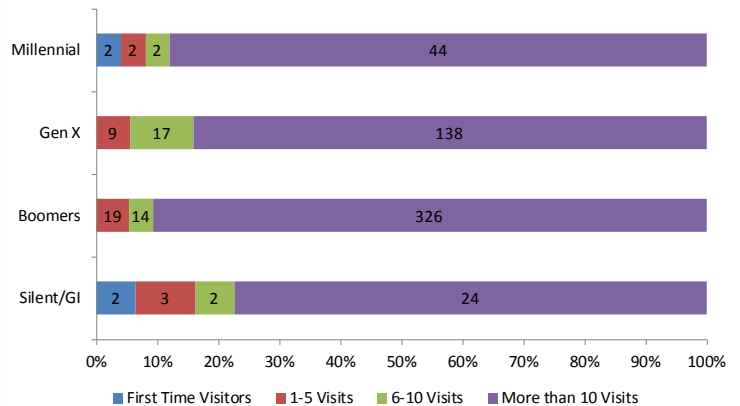


Figure 18: LBI Region Visitors by Number of Previous Visits and Generations



Party Size and Composition

Only 5% of visitors to the LBI Region were traveling alone as is revealed in Figure 19 below. This is significantly less than the average New Jersey visitor, where 21% were traveling alone. Similarly, here 34% were traveling with two people in the party whereas Tyrrell (2013) had the average New Jersey visitor at 44% with parties of this size. Interestingly though, the two profiles differ importantly with respect to parties of 5 people or more, with 30% of the LBI Region’s visitor trip party sizes of 5 or more people, while only 10% of all New Jersey visitors were traveling in parties of this size.

The average party size for a LBI Region visitor is much higher than that of the average New Jersey visitor. Nearly a third of LBI Region visitors were traveling in a party with five or more people. That figure is nearly three times the state average (11%) for party sizes of five or more people. Indeed, visitors traveling with four people to the LBI Region represented another 19%, also ranking favorably when compared to the average New Jersey visitor (13%). The largest party sizes occurred within the family Lifestage segments: Young Family (5.8), Moderate Family (5.4), and Affluent Family (5.4). Over half of respondents noted they were traveling with their spouse (53%), children (39%), and other family (28%).

Figure 20 reveals that Young Families had the largest average party size at 5.8, followed by Moderate and

Affluent Families with 5.4. In both the Mature and Family segments, households with Moderate (3.6 and 5.4) incomes had traveled in parties similar in size to their more Affluent (3.5 and 5.4) counterparts. Young & Free parties (3.4) were generally smaller than Maturing & Free parties (4.4).



Figure 19: LBI Region and New Jersey Visitor Party Size

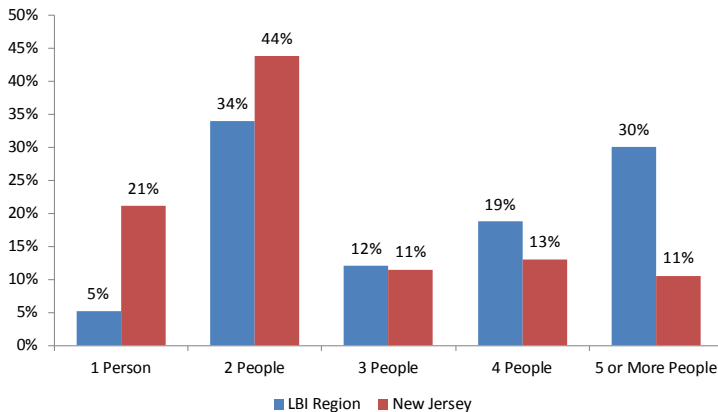
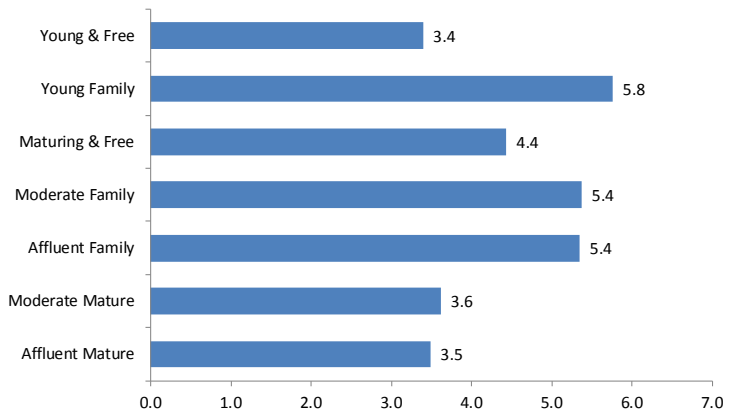


Figure 20: LBI Region Visitor Party Size by Lifestage



The influence of age on party size is perhaps more visible when examining party size by Generation as in Figure 21. Millennial visitors had the highest average party size at 4.9, followed by Gen X at 4.7 visitors per party. Silent/ GI generation parties (3.4) were larger than Boomers who had the smallest party size at 3.2.

Figure 22 shows the party composition of the LBI Region visitor. Over half of respondents noted they were traveling with their spouse (53%). An additional third of respondents noted they were traveling with children (39%). With over a quarter mentioning they were traveling with other family (28%) as well, no doubt, the LBI Region is very important to families in their vacation choice.



Figure 21: LBI Region Visitor Party Size by Generations

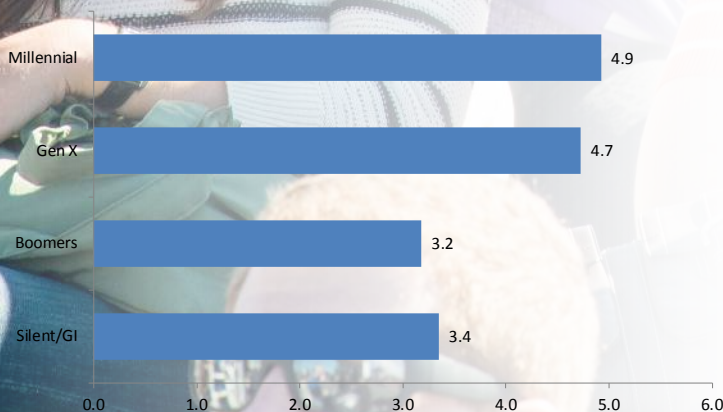
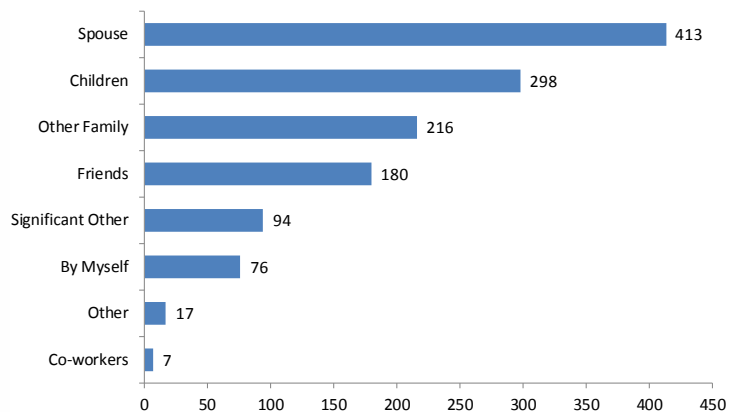


Figure 22: LBI Region Visitor Party Composition



Mode of Transportation

Perhaps not surprisingly, most of the LBI Region visitors (90%) traveled to the destination by car (see Figure 23). These figures are roughly equivalent to those found with the New Jersey visitor profile. The major difference in visitation patterns with New Jersey are that the LBI Region has 7% of their visitors arriving by Recreational Vehicle (RV). Nearly all of these individuals were surveyed at either Bakers Acres or Sea Pirates campgrounds in Tuckerton. Meanwhile, very few (0.3%) suggested their primary means of transportation to the LBI Region was by plane, compared to 7% for the average New Jersey Visitor.

Figure 24 represents the means of transportation used while at the LBI Region destination. These choices were not mutually exclusive, and thus sum to larger than the sample size (774) given that respondents could rightly check off more than one means of transportation while in the LBI Region. Of course, car was the number one means of transportation within the LBI Region, accounting for 83% of the travel. Walking (24%) and biking (13%) were high, a credit to the accessibility of such activities in the LBI Region. Interestingly, the growing shared service economy for transportation, services like Uber for instance, accounted for 3% of within LBI Region travel. Likely, this figure will continue to grow.

***“It’s my favorite place on earth.
Good food, nice people,
beautiful beaches.
What more could you ask for?”***

Visitor - Morristown , NJ

Figure 23: LBI Region Visitor Mode of Transportation

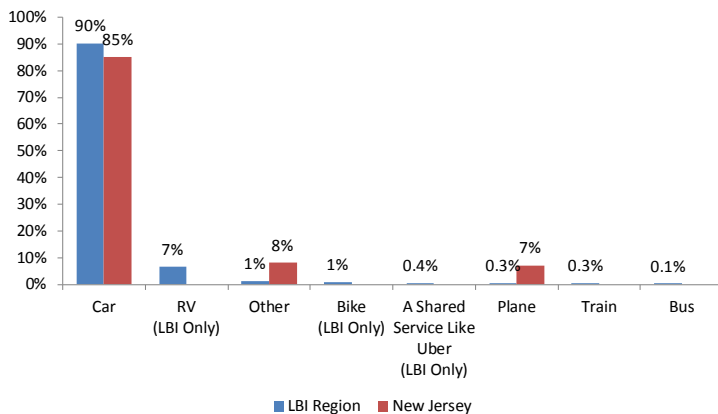
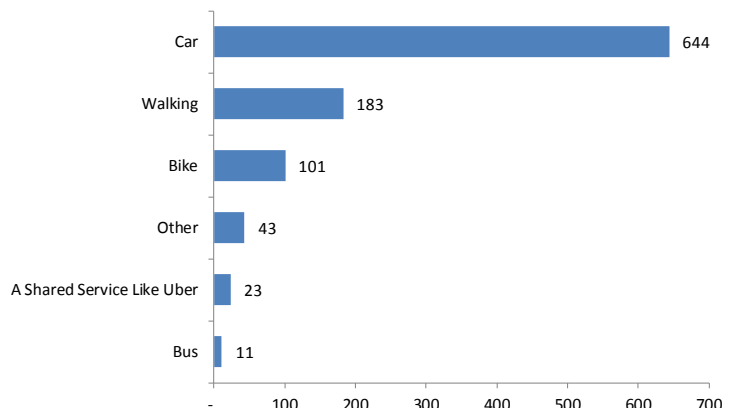


Figure 24: LBI Region Visitor Mode of Transportation Within LBI Region



Satisfaction Levels

Almost nine of every ten visitors (87%) said they were very satisfied with their visit to the LBI Region (see Figure 25). That is a 7% higher than the average New Jersey visitor (80%). Almost no visitors (less than 1%) to the LBI Region suggested they were very dissatisfied, while only 1% of LBI Region visitors mentioned even somewhat dissatisfied. The strong satisfaction levels expressed nearly across the board need no detailed breakdown save for an examination of the open-ended responses listed on the following pages. The vast majority of the comments were positive. The few negative comments left are insightful nonetheless in terms of continuing to improve upon the high quality service that most LBI Region visitors experience. The high satisfaction ratings are frequently accompanied by thoughtful constructive criticism aimed at making the destination they love better by providing the visitors’ perspective.

Return and Recommendation Ratings

Given the region’s high service ratings, equally high return (see Figure 26) and recommendation ratings (see Figure 27, next page) were expected. Here again, the vast majority (95%) of respondents said they were very likely to return to the LBI Region. That compares favorably with the average New Jersey visitors, which are very likely to return (79%). Less than 1% of visitors suggested they were not at all likely to return.

Meanwhile, similar results were found with recommendation intentions (see Figure 27, next page), albeit with even more favorable comparisons to the state. Most of the LBI Region visitors were very likely to recommend the destination (92%) compared to a state average of 59%. Only 1% were not at all likely to recommend the LBI Region, very low compared to the average New Jersey visitor (13%).

Comments Regarding Satisfaction

Figure 28 (page 17) shows the word count of the positive comments respondents made regarding why they were satisfied with their LBI Region visit. With 99% of visitors having expressed satisfaction, of course most of the comments were overwhelmingly positive. Responses that do not fit these criteria were shared with the Southern Ocean County Chamber of Commerce privately. Meanwhile, some of the full quotes from visitors responding to this question are interspersed throughout this report, along with the individuals’ hometown.



Figure 25: LBI Region Visitor Satisfaction Levels

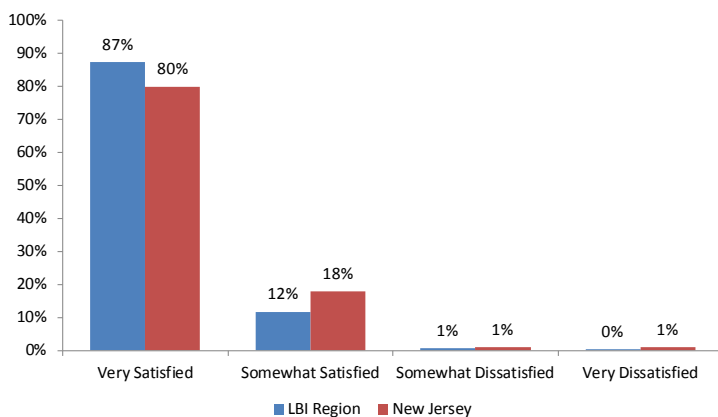


Figure 26: LBI Region Visitor Return Intention

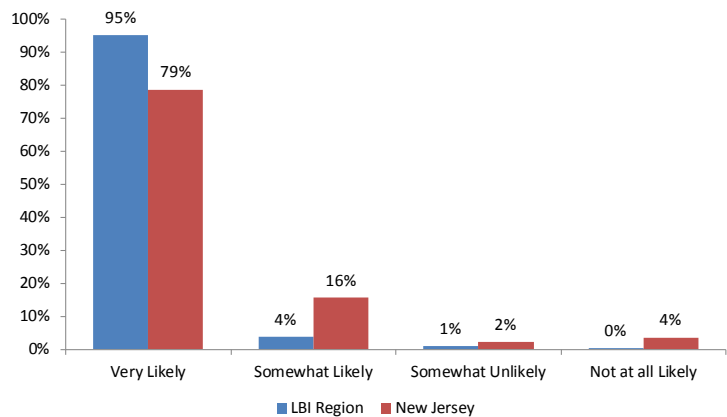
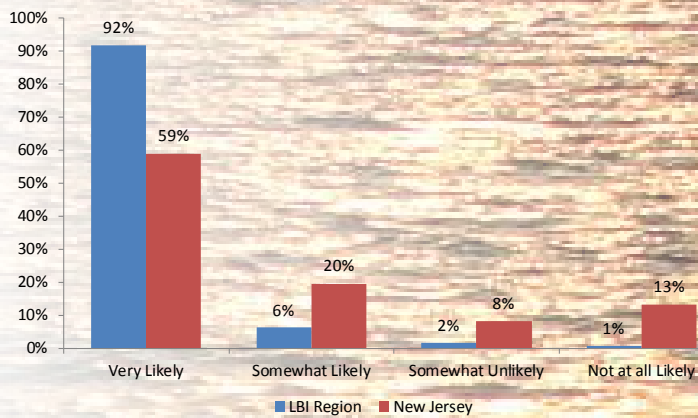


Figure 27: LBI Region Visitor Recommendation Intentions



Trip Related Characteristics

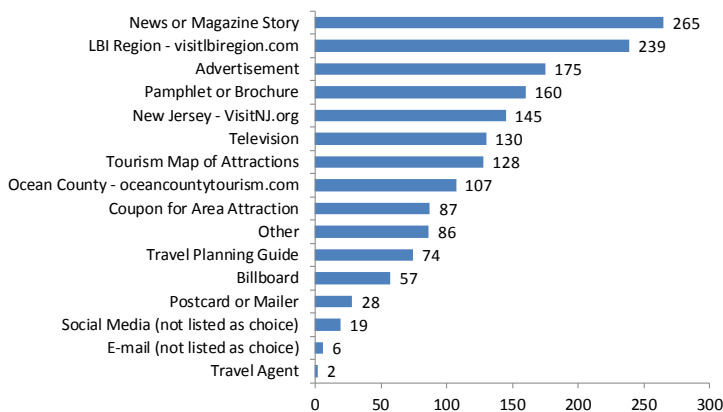
In describing the trip characteristics, it is important to distinguish visitors who primarily visited the mainland from those who primarily visited the island. Subtle differences exist in the two visitor populations which will be explored in the next several pages to some extent, and then in more detail in later sections.

Source of Information

Figure 29 shows the LBI Region visitors' sources of information. Respondents to the survey could select all choices that apply to them, many having sourced information from multiple avenues. News or magazine stories (265) were the most commonly cited source of information for the LBI Region Visitor. The Southern Ocean County Chamber of Commerce recognizes the need for publicity, to maximize their marketing efforts. That appears to be paying dividends as evidenced by the press drawing visitors to the destination.

Of course, the promotion of the LBI Region through visitlbiregion.com was nearly as popular of a choice for source of information of the LBI Region visitors. Driving visitors to a website is an excellent means of capturing a loyal customer base. The New Jersey Division of Travel and Tourism's website visitnj.org is also utilized as a good source of information for the LBI Region visitor. The Southern Ocean County Chamber of Commerce actively updates the state with information.

Figure 29: LBI Region Visitor Sources of Information



Trip Purpose

Figure 30 shows the primary trip purposes of all respondents to the survey. Vacation or pleasure (57%), attending a special event (20%) and visiting friends and/or relatives (8%) were the most commonly cited primary trip purpose of the LBI Region visitor. Both visitors attending a special event and those camping (7%) may be slightly inflated figures given our concerted efforts to survey at several special events and two campgrounds.

At first glance, one may wonder why visiting friends and relatives was not cited more frequently as the primary trip purpose. On closer inspection of the 388 respondents who cited vacation or pleasure as their primary trip purpose, over one-third had cited visiting friends and/or relatives as a secondary trip purpose. Conversely, nearly half (25 out of 55) of those indicating their primary trip purpose was visiting friends and relatives indicated vacation or pleasure was a secondary purpose. Collectively this group might be thought of as primarily traveling for a family vacation. If Figure 30 distinguished this group amongst others, it would be the second largest primary trip purpose.

Figure 30: LBI Region Visitor Primary Trip Purposes

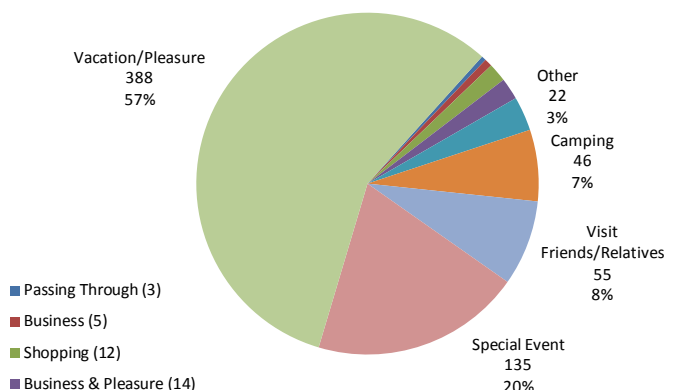


Figure 31 compares the primary trip purposes of the LBI Region visitor with that of the average New Jersey visitor. The 57% of visitors to the LBI Region stating vacation or pleasure was their primary trip purpose compares favorably with the average New Jersey visitor (47%). LBI Region Visitors primarily visiting friends and/or relatives (8%) is well below the state average (39%), though as noted earlier, several of those visiting friends or relatives as a secondary trip purpose stated vacation or pleasure was their primary trip purpose, inflating that figure. Meanwhile special event (20%) and camping (7%) are well above state averages (camping not being identified by the state at all), perhaps a peculiarity of the sampling methodology.

Figure 32 lists all the secondary trip purposes noted by LBI Region visitors. Respondents were rightly able to select multiple choices for their secondary reasons for traveling the destination. Vacation or pleasure (225) was still the most cited purpose followed this time by visit friends and/or relatives (212) and then special events (87) as the top three choices. Comparing Figure 32 with 31, the pattern of secondary trip purpose for the LBI Region in Figure 32 is very similar with the average New Jersey visitor primary trip purpose shown in Figure 31, at least with respect to the top three choices.

Figure 33 presents the LBI Region visitor's primary trip purpose by Lifestage. Given some of the resulting categories have small sample sizes (for example the Young and Free), the results in Figure 33 are presented

Figure 31: LBI Region and New Jersey Visitor Primary Trip Purposes

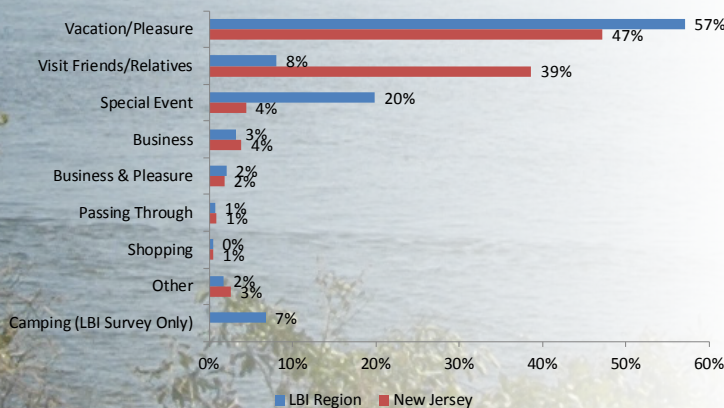
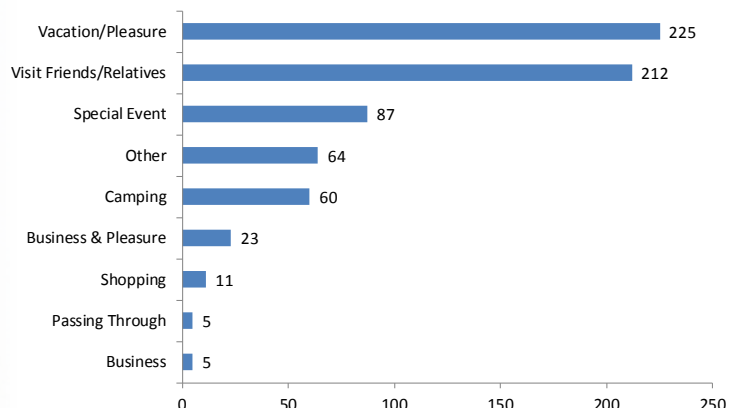


Figure 32: LBI Region Visitor Secondary Trip Purposes



by both sample size (labeled) and percentage (see scale). The Young and Free for instance all mentioned visiting the LBI Region primarily because of special event. There were only five such visitors however and thus one should not take these results as an axiom.

Still, most of the Lifestage categories in Figure 33 have a substantial enough sample size to be able to have confidence in their results. Vacation or pleasure was the primary trip purpose of all Lifestage categories except for the aforementioned Young and Free. Moderate Families (18 out of 23) had the highest percentage of visitors citing vacation or pleasure as their primary trip purpose. Young Families (20 out of 31), Affluent Families (65 out of 98), and Affluent Matures (171 out of 256) had roughly equal proportions of visitors citing vacation or pleasure as their primary trip purpose.

Outside of the Young and Free, Moderate Matures had the highest percentage of visitors to the LBI Region citing a special event as the primary purpose for their visit. The Maturing and Free (17) and Young Family (8) followed this. Healthy proportions of all Lifestage categories had visited the LBI Region primarily for a special event, though as mentioned earlier, this number may be slightly inflated as some of our data collection strategy entailed targeting certain special events, Chowderfest in particular.

Figure 34 represents all the secondary trip purposes that various visitors to the LBI Region organized by their

Lifestage cited. Keep in mind that respondents could select more than one secondary trip purpose, and many chose multiple as would be expected.

Of particular interest, here is the proportion within any Lifestage category that were visiting friends or relatives as a secondary trip purpose. Recall that this trip purpose was cited at a lower rate than expected for primary trip purpose. Nearly half of Affluent Families (47) and Young Families (14) cited visiting friends and/or relatives as their secondary trip purpose.



Figure 33: LBI Region Visitor Primary Trip Purpose by Lifestage

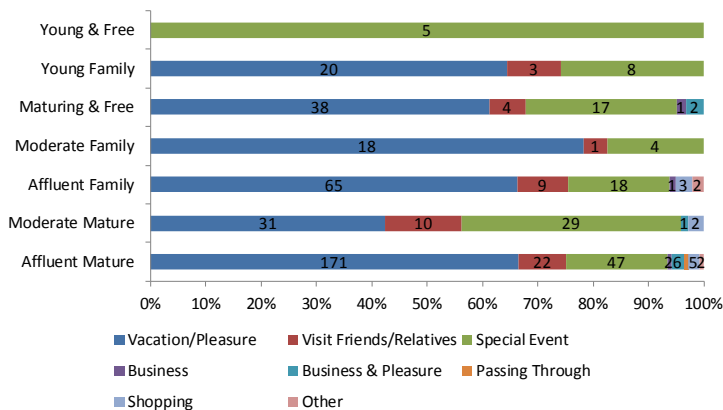
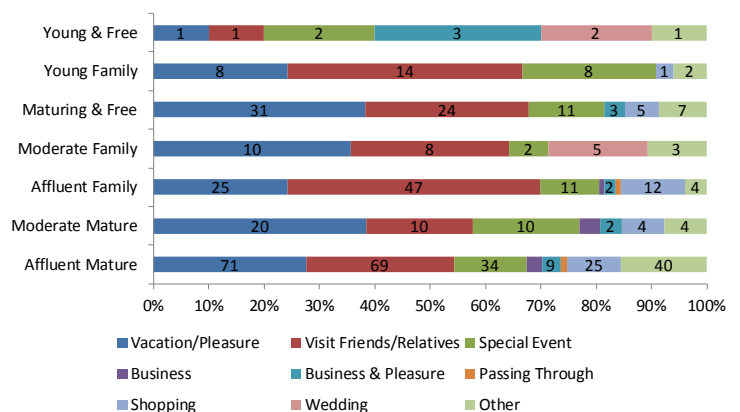


Figure 34: LBI Region Visitor Secondary Trip Purpose by Lifestage



Looking at primary trip purpose by Generation, many of the same observations are true as in the above discussion (see Figure 35). Here again, a high volume of all visitor segments remarked that they were primarily visiting the LBI Region for vacation or pleasure. Gen X'ers (29) were the Lifestage most likely to cite vacation or pleasure as their primary trip purpose for visiting the LBI Region.

Millenials (16) followed by Boomers (82) had the highest proportion of visitors citing a special event as their primary trip purpose. Of note, the smallest proportion of any Lifestage category visiting primarily for special events was found in the Silent/GI (4) visitors.

With regards to secondary trip purposes (see Figure 36), Gen X'ers (71) had the highest proportion of any Lifestage segment citing visiting friends or relatives as a secondary trip purpose, followed by Millennials (21).



Figure 35: LBI Region Visitor Primary Trip Purpose by Generations

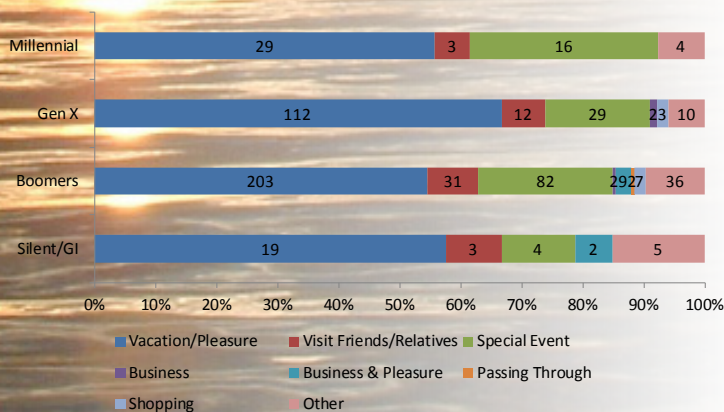
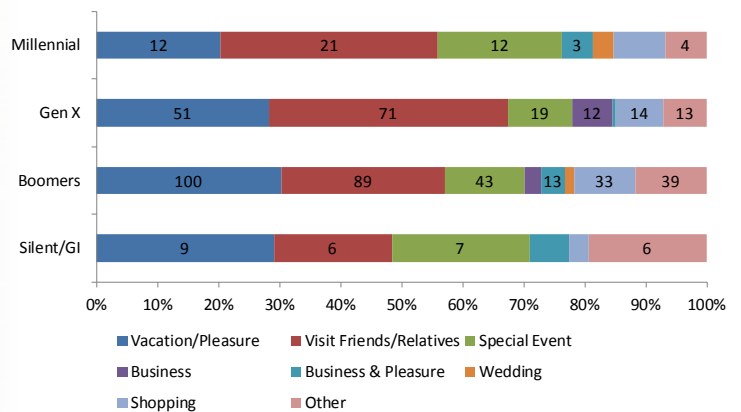


Figure 36: LBI Region Visitor Secondary Trip Purpose by Generations



Comparing Mainland and Island Visitors

Respondents were asked to indicate their primary destination within the LBI Region, listing municipalities as the most discrete choice. Figure 37 shows the percentage of visitors primarily visiting each of the municipalities in the LBI Region. Beach Haven (29%) was the most visited destination within the LBI Region. Tuckerton (21%), Long Beach (13%), Little Egg Harbor (9%), Ship Bottom (8%), Surf City (6%), and Stafford (4%) followed. All other destinations had 3% or less of the market share of the LBI Region visitor. Still, collectively those municipalities represent about 10% of the market and should not be overlooked.

Collectively, the island destinations represented in Figure 37 accounted for 62% of all visitors in the LBI Region, with the mainland destinations representing 38% of the market. The remainder of this report covering such as length of stay, expenditures and accommodation type, will detail unique differences

between the average mainland and island visitor to the LBI Region. While remarkably similar overall, there are indeed characteristics of each that should be highlighted.

Length of Stay

Figure 37 shows the length of stay for visitors to the LBI Region. It reveals that 27% of LBI Region visitors surveyed were on a day trip to the destination. This is marginally higher than that of the average New Jersey (23%) visitors who were day-trippers. Over half (51%) of all LBI Region visitors were staying for 5 or more days, several of whom were staying for multiple weeks. Little difference was observed with these longer length (five or more days) visitors, with 49% of mainland and 52% of island visitors staying this long. Both of these figures and that of the LBI Region as a whole are significantly higher than the state of New Jersey visitor, where only 39% indicated they were staying for 5 or more days.

Figure 37: Primary Destination within the LBI Region

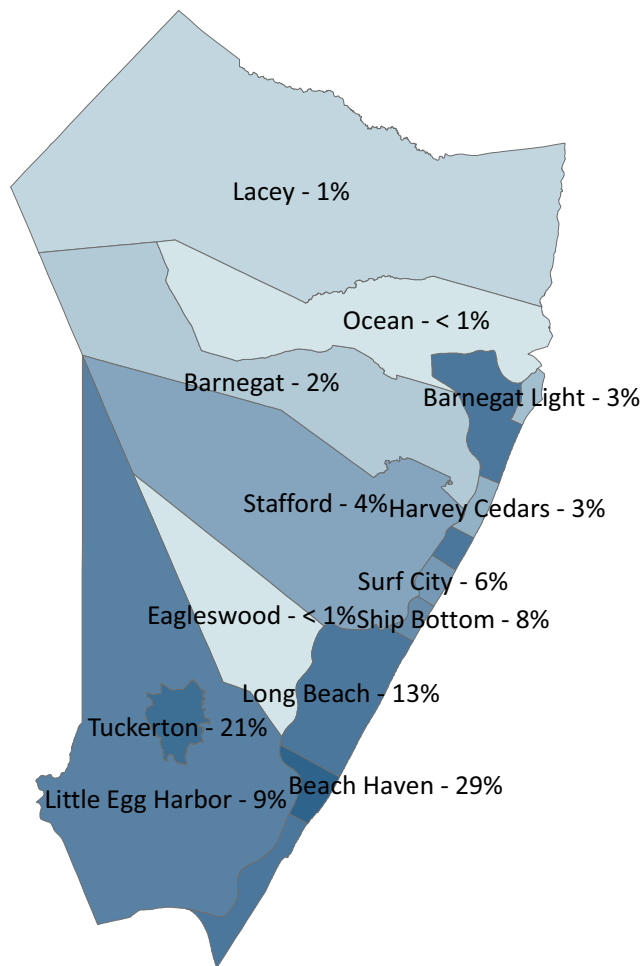
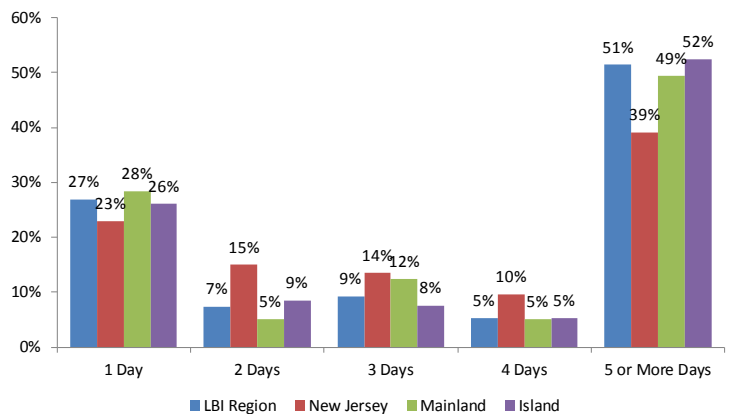


Figure 38: LBI Region and NJ Visitor Length of Stay with Detail on Mainland and Island Visitors





Presenting the average length of stay by Lifestage (see Figure 39) reveals that the Maturing and Free (7.7) and Affluent Families (7.7) had the longest lengths of stay for the average LBI Region visitor. For the mainland visitors, Moderate Families (11.2) had the longest length of stay, followed by the Maturing & Free. Visitors whose primary destination with the island had longer lengths of stay if they were Affluent Families (8.0) or Affluent Matures (7.6). Undoubtedly, the relatively larger disposable income and/or time of those visitors to the LBI Region in the Affluent Families and Affluent Mature Lifestage segment contributes to their relatively longer lengths of stay.

Regarding Generations, the average LBI Region visitor in the Silent/Gen I Generation (8.7) had the longest length of stay at 8.7 nights, followed by the Gen X'ers (7.3). For visitors primarily visiting the mainland destinations, the same pattern holds, though Gen X'ers stayed longer here (8.0) than the average Gen X'er to the LBI Region (7.3). Visitors primarily traveling to island destinations in the LBI Region also had the Silent/Gen I Generation staying the longest on average (9.5), and Gen X'ers (7.0) stayed about the same length of time as the Boomers (6.9) on average. Certainly, the relatively longer lengths of stay of those visitors to the LBI Region in the Silent/Gen I generation contribute to their relatively longer lengths of stay.

Figure 39: LBI Region Length of Stay by Lifestage with Detail on Mainland and Island Visitors

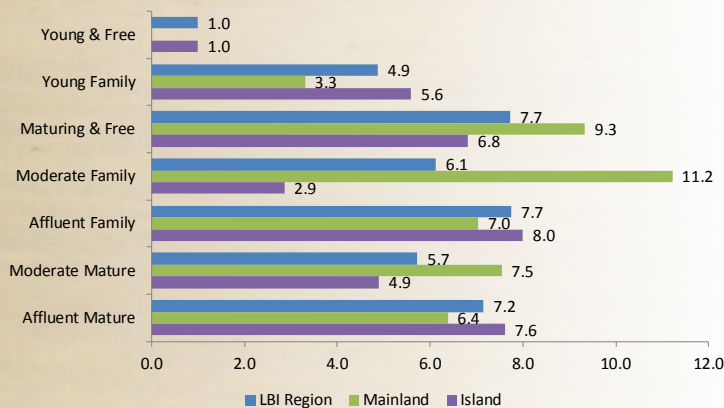
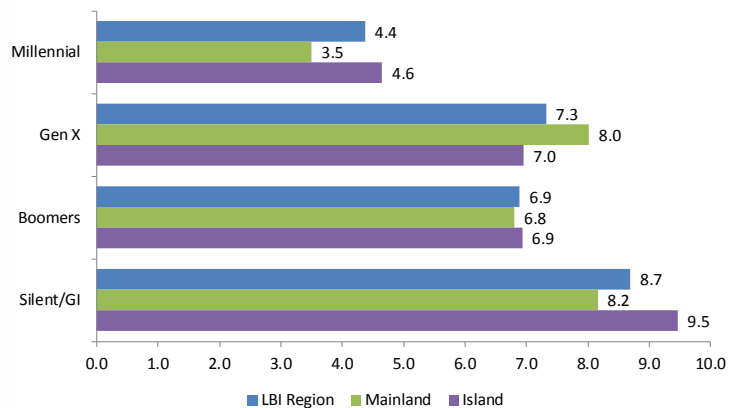


Figure 40: LBI Region Length of Stay by Generations with Detail on Mainland and Island Visitors



Expenditures

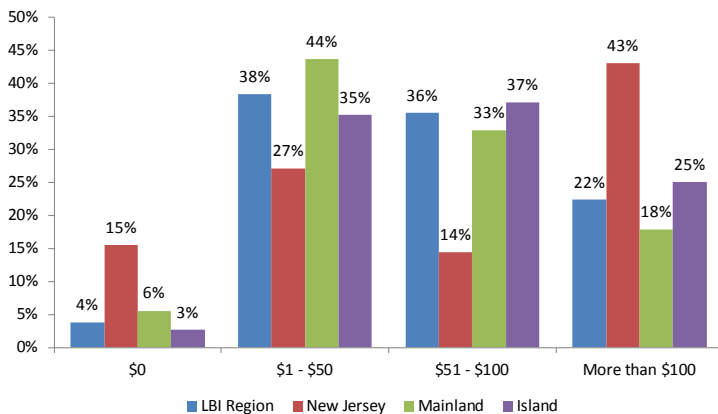
The following pages detail spending on the five major categories of tourism spending: food and beverage, entertainment, lodging, shopping and transportation. Each is shown for the LBI Region, the average New Jersey visitor, and those traveling to either the mainland or island destinations within the LBI Region. All expenditure figures expressed are on average, per day while visiting the LBI Region. Later, the mid-point of the range is used as an approximate average when examining expenditures by both Lifestage and Generation. For now, only the categories for which the respondent had to choose from are shown.

Food and Beverage

Over one third of visitors to the LBI Region spent on average per day \$1 to \$50 (38%) on food and beverage expenditures (see Figure 41). A roughly equal percentage of LBI Visitors Spent between \$51 and \$100 on food and beverage while at the destination. Compared to the state average (43%) of visitors spending more than \$100 on food and beverage, fewer LBI Region (27%) visitors were in this category.

Compared with mainland visitors (33% and 18%) to the LBI Region, those spending between \$51 and \$100, and those spending more than \$100 on food and beverage, were a larger share of the visitor market for visitors primarily visiting island (37% and 25%) destinations.

Figure 41: LBI Region Food and Beverage Expenditures with Detail on Mainland and Island Visitors



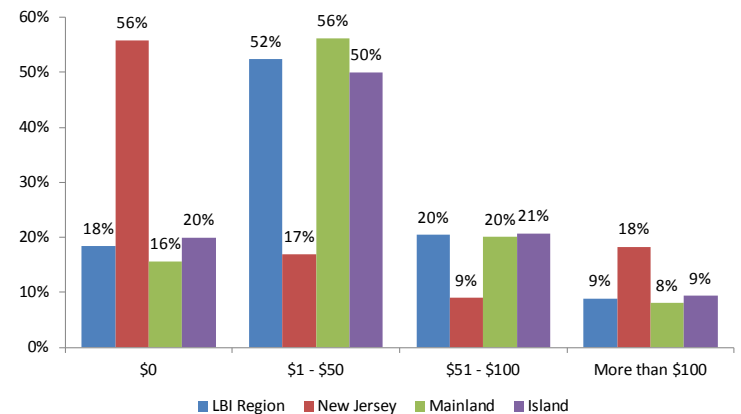
Entertainment

Over half (52%) of all LBI Region visitors spent between \$1 and \$50 on entertainment while visiting the LBI Region (see Figure 42). That figure is well above the state average of 17% for expenditures on entertainment of between \$1 and \$50. Conversely, while 56% of New Jersey visitors spent nothing on entertainment, the LBI Region visitors was substantially below that at 18%.

In the upper tiers of spending, the LBI Region visitor was more than twice as likely as the average New Jersey visitor (20% compared to 9%) to have spent between \$51 and \$100 on per day spending on entertainment while at the destination. The opposite relationship holds true for spending of more than \$100 on entertainment, with 9% of LBI Region visitors spending in excess of \$100, while twice as many New Jersey (18%) visitors spent this amount. Very little difference existed in the spending on entertainment between the mainland and island visitor to the LBI Region.



Figure 42: LBI Region Entertainment Expenditures with Detail on Mainland and Island Visitors



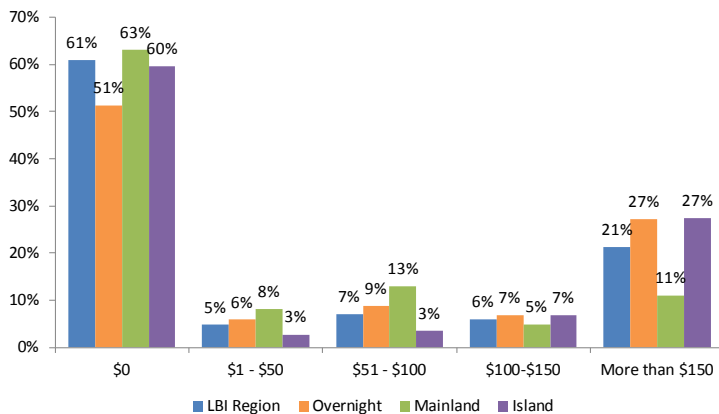
Lodging

Nearly one-fourth of visitors spent more than \$100 per day on food in the LBI Region, and over one-fourth of overnight visitors to the LBI Region spent more than \$150 per day on lodging (27%) (see Figure 43). Here it is important to distinguish between the overnight visitors and that of the region as a whole, given that day-trippers are not spending monies on overnight accommodations. Still, a full half (51%) of overnight visitors are doing the same, with many remarking that they are staying with a friend or family member who owned a home on the island. Therefore, while those visitors may have not spent monies on lodging, their host most certainly is.

Looking just at the overnight visitors, more than one-fourth spent over \$100 on lodging per day. That figure is higher for those visitors that primarily visited island (27%) destinations in the LBI Region, compared to those that primarily visited the mainland (11%).



Figure 43: LBI Region Lodging Expenditures with Detail on Overnight and Mainland and Island Visitors



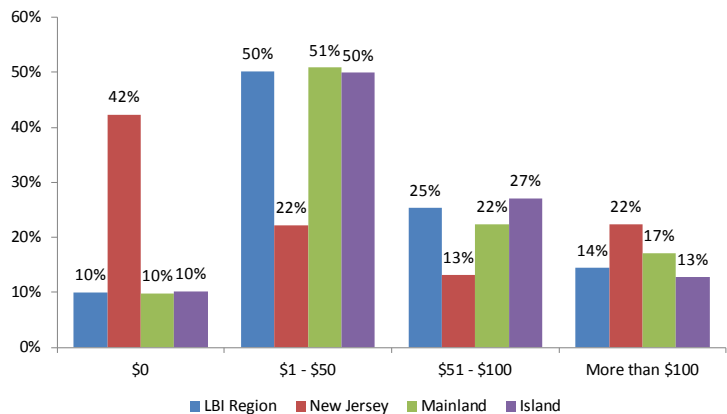
Shopping

LBI Region visitors like to shop, as revealed in Figure 44. Only one in 10 visitors (10%) suggested they do not spend anything on shopping, a figure over four times less than the state average (42%). Half of LBI Region visitors (50%) spent on average per day between \$1 and \$50, twice that state average of 22%. Spending in the \$51 to \$100 range also compared favorably with the state, with the one-fourth (25%) of LBI Region visitors spending this amount, while only 13% of New Jersey visitors expressing the same. An additional 14% of LBI Region visitors spent in excess of \$100 per day on average for shopping. Very little difference in the shopping habits of LBI Region visitors classified as either mainland or island visitors exist.

Transportation

Figure 5 reveals transportation expenditures of the LBI Region visitor with detail and the mainland and island visitors. Here a comparable figure for the New Jersey state average is not available. Many visitors cited not spending any money on transportation, with nearly half spending between \$1 and \$50. Very little difference between the transportation expenditures of the LBI Region visitor existed when comparing the primarily mainland and island visitor.

Figure 44: LBI Region Shopping Expenditures with Detail on Mainland and Island Visitors



Lifestage

While not exactly scientific, taking the mid-point of each range allows the calculation of a rough average expenditure for each category of spending. In general, this would lead to slightly deflated figures as, for instance, if spending of “more than \$100” on shopping were classified as “\$125”, while many of these individuals may very well have spent well in excess of this figure. Still, the practice will allow a closer look at average spending amongst categories within a Lifestage or Generation.

Figure 46 shows the average expenditures within each of the five expenditure categories by various lifestages. Young Families and the Young and Free spent the most on lodging (\$116 and \$110 respectively). Affluent Families (\$79), the Maturing and Free (76 spent the most on food and beverage expenditure. Young Families spent more on Shopping (\$101). Moderate Matures spent the most on transportation (\$38). In general, Young Families spent more than other Lifestage segments, followed by Affluent Families, and the Young and Free.

“I love Long Beach Island and have been vacationing there, as well as having owned a home there, for my entire life. No other shore point compares!”

Visitor - North Wales, PA

Figure 45: LBI Region Transportation Expenditures with Detail on Mainland and Island Visitors

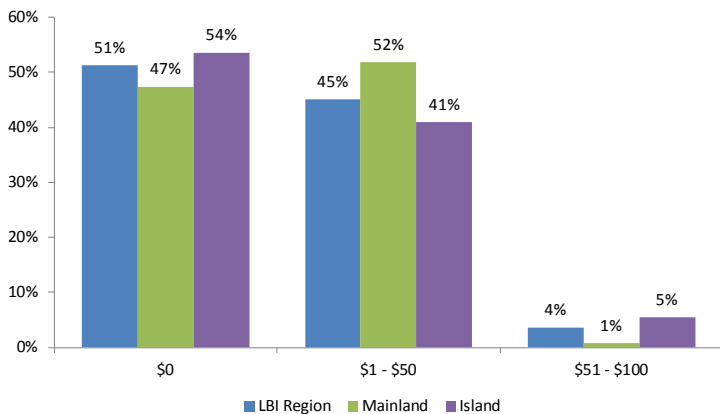
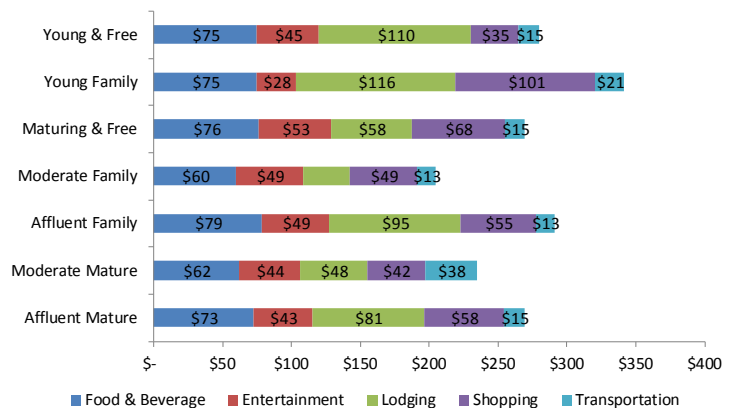


Figure 46: LBI Region Visitor Expenditures by Lifestage



Generations

A similar average expenditure is calculated for visitors to the LBI Region classified by their Generation (see Figure 47). Millennials spent the most on average, followed by the Gen X'ers. Gen X'ers spent the most on average for lodging (\$93) followed by the Millennials (\$90). Millennials (\$86) spent the most on shopping. Gen X'ers spent the most on food and beverage (\$80) followed by the Boomers (\$72). Gen X'ers (\$51) also led the way on expenditures on entertainment. Boomers (\$20) spent the most on average per day for expenditures on transportation.

“Love Tuckerton Seaport. Very nice museum, pirate festival, and people.”

Visitor - New Providence, NJ

Lifestage by Mainland/Island

Comparing mainland to island visitors by Lifestage, the two groups of LBI Region visitors are remarkably similar (see Figure 48). There were slightly more Affluent Mature visiting the mainland as their primary destination (50%) compared with those primarily visiting the island (45%). Conversely, they were slightly more Affluent Families primarily visiting the island (19%) than the mainland (15%).

Generations by Mainland/Island

The Silent/GI Generation made up a larger percent of the primarily mainland visitors (10%) compared to those primarily visiting the island (3%) (see Figure 49). Boomers made up a slightly larger percentage of visitors to the island (61%) compared with the mainland (57%).

Accommodations

More than 4 in 10 visitors were staying in a personal second home while visiting overnight in the LBI Region (See Figure 50). Rentals (23%) comprised the next largest category, with rentals through a real estate agent (14%) comprising nearly two-thirds of this market, and rentals through a shared service like Airbnb (9%) comprising the remaining. Almost all the campers mentioned primarily visiting the mainland, which accounted for over one-third (39%) of the lodging accommodations of mainland visitors. Four of every 10

Figure 47: LBI Region Visitor Expenditures by Generations

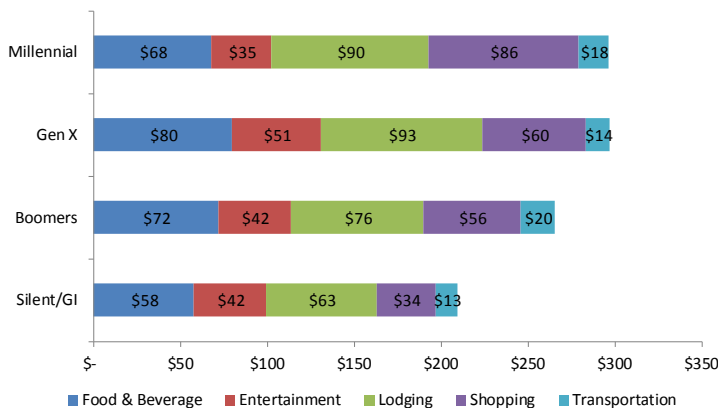
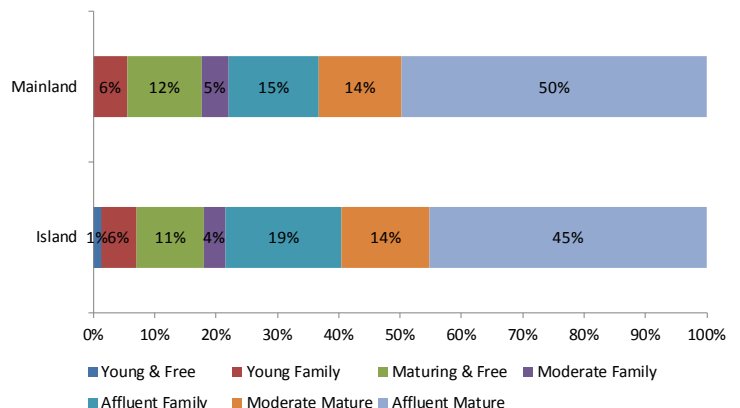


Figure 48: LBI Region Comparison of Mainland and Island Visitors by Lifestage



respondents primarily visiting the mainland and island (41% and 43% respectively) were staying at a personal second home. Rentals through a real estate agent were significantly higher for visitors primarily traveling to an island destination in the LBI Region.

Visitor Origins by Mainland/Island

Figure 51 and Figure 52 (page 29) show the visitor origins by county of both the primarily mainland and primarily island visitors (respectively), focusing in on the region from Fairfield, CT to Fairfax, VA. In general, those LBI Region visitors primarily visiting the island destinations came from further afield. Note that the list of visitors not pictured (because their origin was outside of the CT to VA are shown) is much more extensive for the island visitor compared to the mainland. The similarity with respect to the draw is more pronounced in the counties immediately surrounding the destination. Moving further from the LBI Region, island visitors are often twice as likely from those counties not contiguous to the LBI Region.



Figure 49: LBI Region Comparison of Mainland and Island Visitors by Generations

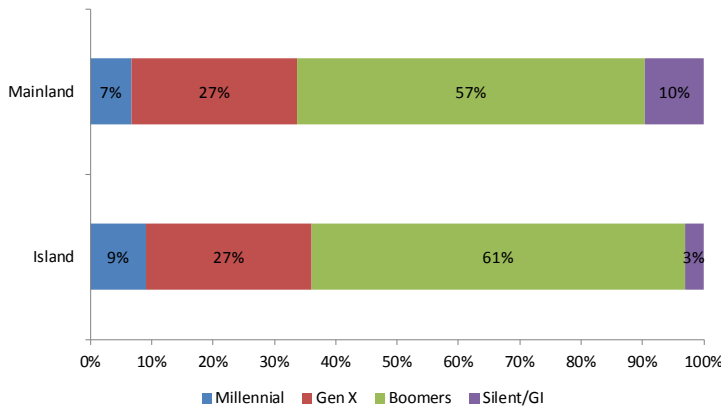


Figure 50: LBI Region Comparison of Mainland and Island Visitors by Accommodation Type

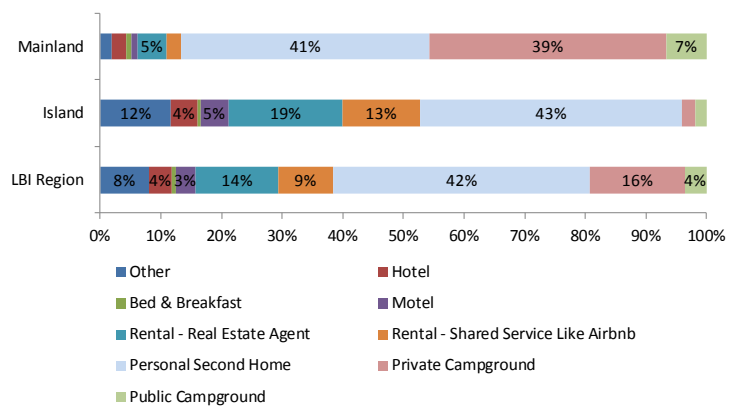


Figure 51: LBI Region Mainland Visitor Origins by County, Focus on Fairfield CT to Fairfax VA

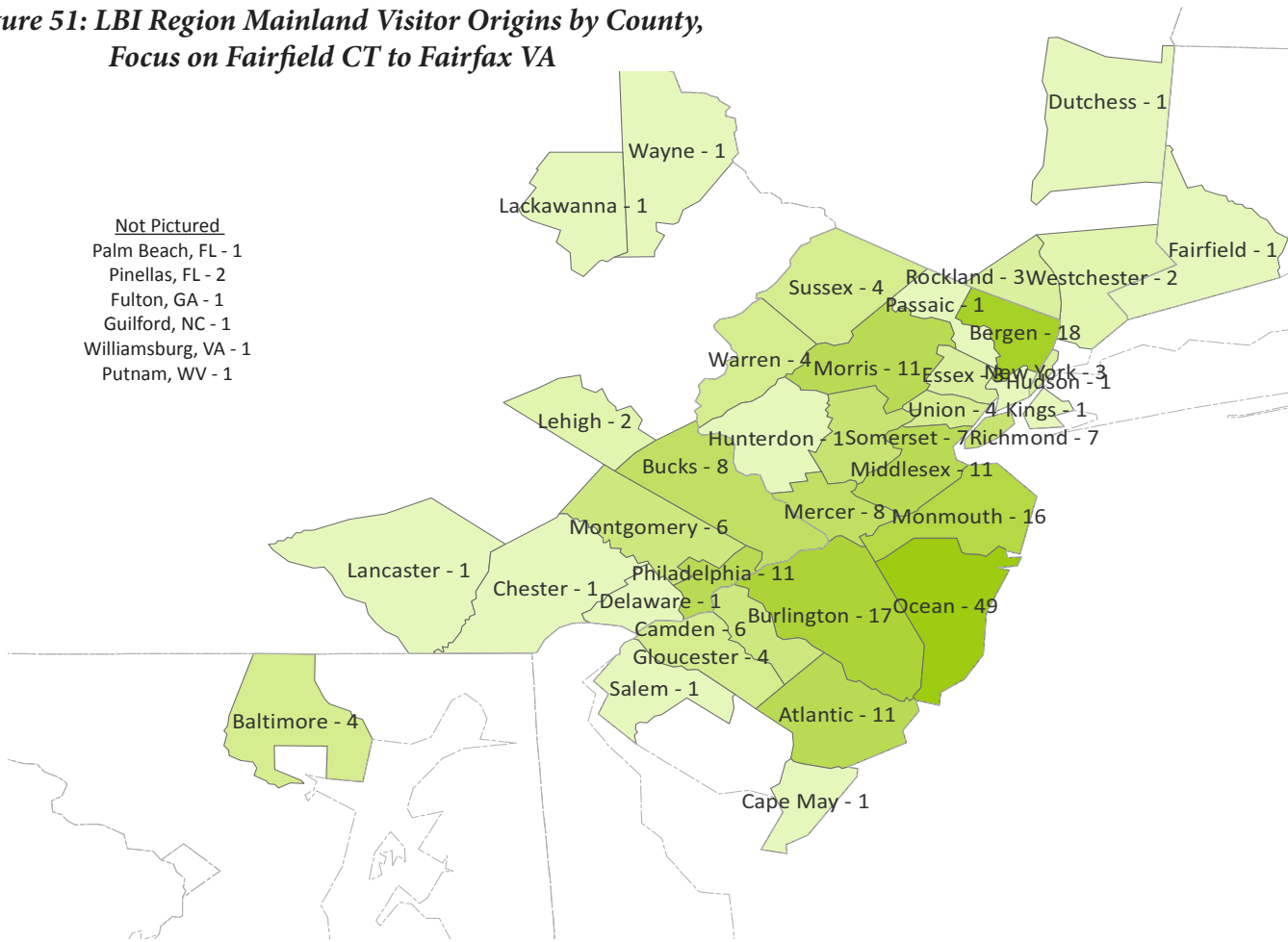
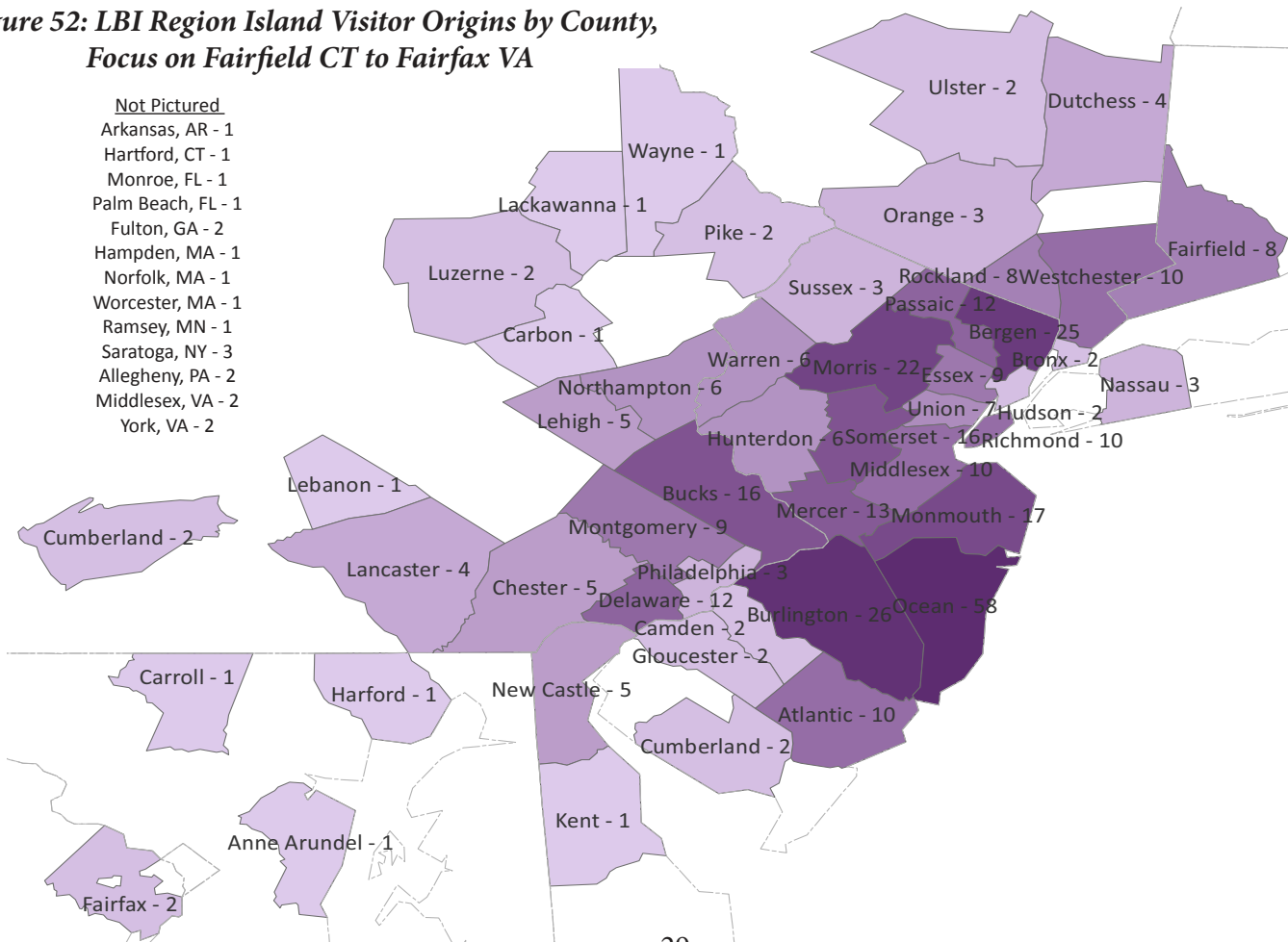


Figure 52: LBI Region Island Visitor Origins by County, Focus on Fairfield CT to Fairfax VA



The Southern Ocean County Chamber of Commerce and Stockton University are conducting research on visitation to the Long Beach Island (LBI) Region of New Jersey, including municipalities in Southern Ocean County NJ. Please consider taking the time to answer the following short (less than 5 minutes) survey regarding your current visit.

1-2. Which LBI Region municipality did you spend the majority of your time in (**Primary, please choose one**) and which did you spend some time in (**Secondary, please choose all that apply**) during your most recent trip? If you are unsure of the municipality, please choose other and provide some descriptor.

1. Primary **(one)** 2. Secondary **(all that apply)**

- | | | |
|-----------------------------------|---|---|
| a. Barnegat | a | a |
| b. Barnegat Light | b | b |
| c. Beach Haven | c | c |
| d. Eagleswood | d | d |
| e. Harvey Cedars | e | e |
| f. Lacey | f | f |
| g. Little Egg Harbor | g | g |
| h. Long Beach | h | h |
| i. Ocean | i | i |
| j. Ship Bottom | j | j |
| k. Stafford | k | k |
| l. Surf City | l | l |
| m. Tuckerton | m | m |
| n. Other (<i>specify</i>) _____ | | |

3. What year was your most recent (or current) visit to the LBI Region?
a. _____ (*year*)

4. What month did you visit in?
a. _____ (*month*)

5. Was (Is) this your first visit to the LBI Region?
a. Yes
b. No
c. Not Sure

6. If this was (is) not your first visit to the LBI Region, how many previous visits have you made to the LBI Region?
a. _____ (*previous visits*)

7. How many days/nights did (will) you spend in the LBI Region?
a. _____ (*days*)
b. _____ (*nights*)

8-9. Please indicate both the Primary (**P, choose one**) and secondary (**S, choose all that apply**) purposes for this trip?

- | | | |
|---------------------------------|--------------|--------------|
| | 8. (P) | 9. (S) |
| | (one) | (all) |
| a. Vacation/pleasure | a | a |
| b. Visit friends/relatives | b | b |
| c. Incentive travel program | c | c |
| d. Attend a special event | d | d |
| e. Business | e | e |
| f. Business and pleasure | f | f |
| g. Just passing through | g | g |
| h. Wedding/get married | h | h |
| i. Shopping | i | i |
| j. Other (please specify) _____ | | |

10. Where did you stay while visiting the LBI Region?
a. Hotel
b. Bed & Breakfast
c. Motel
d. Home (or Apartment/Condominium) Rental through a Real Estate Agent
e. Home (or Apartment/Condominium) Rental through a Shared Service Like Airbnb
f. Personal Second Home
g. Private Campground
h. Public Campground
i. Other (*specify*) _____

11. Including yourself, how many were (are) in your immediate party?
a. _____ (*party size*)

12. What type of transportation did you utilize in traveling to the LBI Region?
a. Car
b. A Shared Service Like Uber
c. Plane
d. Bus
e. Bike
f. Train
g. Other (*specify*) _____

13. What type of transportation did you utilize in traveling around the LBI Region while visiting (i.e. once here)? (**choose all that apply**)

- a. Car
b. A Shared Service Like Uber
c. Plane
d. Bus
e. Bike
f. Train
g. Walking
h. Other (*specify*) _____

14. With whom were (are) you traveling? (**choose all that apply**)

- a. By myself
b. Significant other
c. Spouse
d. Friends
e. Children
f. Coworkers
g. Other family
h. Other (*specify*) _____

15. Overall, how satisfied were (are) you with your visit?

- a. Very satisfied
b. Somewhat satisfied
c. Somewhat dissatisfied
d. Not at all satisfied

16. What was the main reason why you were (are) either satisfied or dissatisfied with your visit?

- a. _____

17-21. About how much will you spend on average per day for each of the following while in the LBI Region: Food and Drink (F); Entertainment (E); Lodging (L); Shopping (S); Transportation (T)?

- | | | | | | |
|----------------|-----|-----|-----|-----|-----|
| | 17. | 18. | 19. | 20. | 21. |
| | (F) | (E) | (L) | (S) | (T) |
| a. \$0 | a | a | a | a | a |
| b. \$1-\$50 | b | b | b | b | b |
| c. \$51-\$100 | c | c | c | c | c |
| d. \$101-\$150 | d | d | d | d | d |
| e. \$151-\$200 | e | e | e | e | e |
| f. \$201-\$250 | f | f | f | f | f |
| g. \$251-\$300 | g | g | g | g | g |
| h. \$301-\$350 | h | h | h | h | h |
| i. \$351-\$400 | i | i | i | i | i |
| j. \$401-\$450 | j | j | j | j | j |
| k. \$451-\$500 | k | k | k | k | k |
| l. \$500 + | l | l | l | l | l |

22. How likely will you be to return to the LBI Region?

- a. Very Likely
b. Somewhat Likely
c. Somewhat Unlikely
d. Very Unlikely

23. How likely will you be to recommend the LBI Region?

- a. Very Likely
b. Somewhat Likely
c. Somewhat Unlikely
d. Very Unlikely

24. From the following list please tell us, if you recall having seen or heard anything about the LBI Region? (**choose all that apply**)

- a. Television
b. News or magazine story
c. Advertisement
d. Pamphlet or brochure
e. Travel planning guide
f. Postcard or mailer
g. Coupon for area attraction
h. Tourism map of attractions
i. Billboard
j. Travel agent
k. NJ website VisitNJ.org
l. LBI Region website VisitLBIRegion.com
m. Ocean County website OceanCountyTourism.com
n. Other (*specify*) _____

25. Are you familiar with the planned Water Taxi between Tuckerton and Beach Haven?

- a. Yes
b. No

26. What is the likelihood that you would use a Water Taxi between Tuckerton and Beach Haven?

- a. Very Likely
b. Somewhat Likely
c. Somewhat Not Likely
d. Definitely Not Likely
e. Other (please specify) _____

27. What is your zip code?

- a. _____ (*zip*)

28. What is your age?

- a. _____ (*age*)

29. Which of the following best represents your race or ethnic group?

- a. White (Non-Hispanic or Latino)
b. African American
c. Asian/Pacific
d. Other/mixed
e. Hispanic or Latino
f. Other (*specify*) _____

30. Which of the following best describes your highest level of education?

- a. Less than high school graduate
b. High school graduate
c. Some college
d. College graduate or more
e. Other (*specify*) _____

31. Which of the following best describes your marital status?

- a. Married
b. Single, never married
c. Divorced/separated
d. Widowed
e. Civil union

32. Please indicate how many children you have under the age of 18

- a. _____ (*children < 18*)

33. Please indicate the age of your youngest child.

- a. _____ (*age*)

34. Which of the following best represents your household income last year before taxes?

- a. Less than \$25,000
b. \$25,000-\$34,999
c. \$35,000-\$49,999
d. \$50,000-\$74,999
e. \$75,000-\$99,999
f. \$100,000-\$124,999
g. \$125,000-\$149,999
h. \$150,000-\$174,999
i. \$175,000-\$199,999
j. \$200,000 or More
k. Thanks, but I'd rather not answer that question.

35. What is your gender?

- a. Male
b. Female

36. Would you like to receive regular updates from the LBI Region? If so, please supply your email address.

- a. _____ (*email address*)

Thank you for your assistance with completing this survey.

To Be Completed by Interviewer

- Date _____
Time _____
Location _____
Interviewer _____
Notes _____

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