

**CHAPTER FOUR**  
**Profile of, and Direct Economic Impacts from,  
Heritage Tourism**

## INTRODUCTION

Giant and growing, the U.S. travel and tourism industry has captured the attention of state and local governments eager to bolster local economies and enhance community amenities.

The \$400 billion travel industry—one of America’s fastest-growing business segments—accounts for approximately 6 percent of the nation’s gross domestic product. Demographic, socioeconomic, and lifestyle factors are affecting the industry’s volume and its predominant component—the pleasure trip market. Heritage tourism, one of the top reasons for pleasure travel, has become increasingly important to travelers and the communities they visit, and offers significant benefits to the community. Heritage tourism can offset the costs of maintaining historic sites, help stimulate preservation efforts, and perpetuate the “sense of place” that lends communities their unique character and identity. At the same time, heritage tourism can realize important economic gains with respect to jobs, income, and tax revenues.

New Jersey is a national leader in the travel and tourism industry; the state ranked seventh in the nation in 1993 with respect to travel revenues. Atlantic City’s casinos and the Jersey shore are the state’s dominant travel destinations, but they face formidable competition from nearby markets. New Jersey’s numerous historic and cultural resources are underdeveloped as a travel destination; they represent an opportunity to diversify the state’s travel business and assure better long-term industry growth. Industry experts expect visits to historic and cultural sites to figure more prominently in vacation and short-term pleasure trips—both nationally and in New Jersey.

This chapter analyzes heritage tourism in the nation and in New Jersey. First, an overview of the U.S. travel market sets out a perspective on the market’s size, features, trends, and impacts. Next, heritage tourism’s growth factors, benefits, and impacts are briefly surveyed at the national level. Finally, the New Jersey travel market and data compiled on the features and economic impacts of New Jersey heritage tourism are closely reviewed.

## SUMMARY OF FINDINGS

### National Travel and Heritage Tourism

- Travel in the United States is significant in scale—there were over one billion domestic trips of 100 miles or more in 1994.
- Travel is significant economically. In 1994, Americans traveling in the United States and foreigners visiting the country, together spent almost \$400 billion. This spending has a multiplier benefit of roughly 2 to 2.5 times, which means that total travel-related spending in the economy in 1994 was between \$800 billion and \$1 trillion.
- About 30 percent of domestic travel is for business, and 70 for percent pleasure trips.
- There are numerous trends in the travel market fostering heritage tourism, including and increase in travel for pleasure, as opposed to business, and a growing tendency toward shorter duration and shorter distance trips. Baby boomers—large in number and with growing discretionary income—also have a proclivity toward heritage tourism.

- While the precise scale of national heritage tourism is unavailable, it is by all accounts a significant component of pleasure travel. Forty percent of families traveling on vacation stop at historic sites (Schiller 1996), and museums and cultural events rank among Americans' favorite tourist attractions (McDowell 1997).
- Numerous reports show heritage tourism's significant contribution to the economy. In Virginia, for instance, historic preservation visitors were found to stay longer, visit twice as many places, and spend on average over two and one-half times more money in that state than other visitors.

### **New Jersey Travel and Heritage Tourism**

- Travel and tourism are also significant to New Jersey's economic well-being. The 163 million adult trips (of all distances) made in New Jersey in 1995 generated \$11 billion in traveler expenditures—approximately three percent of the state's gross domestic product. Travel is one of the state's three largest industries; it creates about five percent of all New Jersey jobs.
- There are weaknesses in the New Jersey travel market however. Day-trip travel is much more frequent than overnight travel (and overnights spend more). Relatedly, touring travel is not fully exploited; travel in the state is driven by convenience and the dual major attractions of the shore and gaming (Atlantic City). New Jersey's tourism also draws disproportionately from closer rather than more distant locations (e.g., from the Mid-Atlantic market as opposed to other regions). The state must also fight a negative image as an unattractive destination (however unjustified).
- Enhanced heritage tourism in New Jersey would not only expand the overall travel market in the state, but would also address some of the weaknesses noted above. Heritage tourism would increase overnight and touring vacations and would expand the now overly concentrated travel objectives (the shore and the casinos) and travel origins (mid-Atlantic market). In addition, New Jersey is rich in historic and other interesting sites, which are at the core of heritage travel.
- Heritage travel is already an important component of the New Jersey travel market as is depicted below:

**Annual Average Trip Distribution for New Jersey (1993-1995)**

<b>Trip Type (Adult)</b>	<b>Total NJ Trips</b>	<b>Heritage Trips</b>	<b>Heritage as % of Total NJ Trips</b>
Daytrips	131.6 million	5.0 million	3.8%
Overnight Trips	<u>35.8 million</u>	<u>4.1 million</u>	11.4%
All Trips (Day and Overnight)	167.4 million	9.1 million	5.4%

- The profile of the heritage traveler in New Jersey leans heavily toward middle-aged, married, Caucasian adults who are relatively well-educated and have middle or higher incomes.
- The profile of the heritage trip compared to all New Jersey trips—is a longer trip; a group trip (often part of a family trip); one that is planned further in advance than other trips, and from which travelers derive a higher level of satisfaction (i.e., the trips have a higher overall positive rating).

- Heritage travelers spend much more than their non-heritage counterparts.

**Average Spending per Trip for New Jersey (1993-1995)**

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<b>Trip Type (Adult)</b>	<b>All New Jersey Travelers</b>	<b>Heritage Traveler</b>	<b>Heritage as % of All New Jersey Travelers</b>
Daytrips	\$47	\$55	117%
Overnight Trips	\$157	\$252	161%

- Travel expenditures of New Jersey heritage travelers, counting only the spending attributable to the heritage portion of their travels, amount to some \$433 million annually. In the case of a lawyer traveling to Newark on business, for example, and stopping at historic Ballantine House, only a fraction of this trip's expenditure would be counted as a heritage trip expenditure.

**Annual Total Trip Spending for New Jersey (1993-1995)**

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<b>Trip Type (Adult)</b>	<b>Total NJ Trips</b>	<b>Heritage Trips</b>	<b>Heritage Spending as % of Total NJ Trip Spending</b>
Daytrips	\$6,140 million	\$277 million	4.5%
Overnight Trips	\$5,597 million	\$156 million	2.8%
All Trips (Day and Overnight)	\$11,737 million	\$433 million	3.7%

**NATIONAL TRAVEL AND TOURISM OVERVIEW**

- Americans took over 1 billion domestic trips in 1994 of 100 miles or more (U.S. Travel Data Center 1994) away from home.
- Domestic travel in the United States is predominantly comprised of pleasure trips (69%) and business trips (31%). The three main components of pleasure travel are visiting friends and family (53%), outdoor recreation (16%), and entertainment (31%).
- A look at the demographic characteristics of U.S. resident travelers in 1994 (Exhibit 4.1) shows that the travelers are most apt to be: male, married, middle-aged, professional, and affluent.
- Almost half of all U.S. resident trips involved a hotel/motel stay in 1994; another third of the travelers stayed with friends and relatives. No accommodations were used during 11 percent of all trips, as Americans again increased their frequency of daytrips. The average pleasure trip lasted 3.7 nights, but the average business trip duration was shorter, 3.0 nights.
- In 1994, Americans traveling 100 miles or more from home spent \$333 billion. In addition, an estimated 46 million foreigners spent \$57 billion while visiting the United States.
- Travel expenditures create secondary impacts that magnify travel's contribution to the economy, as shown in Exhibit 4.2. This exhibit indicates the direct, the indirect

and induced, and finally the total economic impacts of travel in the United States in 1990.

- There are a number of overall forces affecting travel and tourism in the United States that bear on heritage tourism. These include:
  1. A stimulus for travel growth is expected to come from the increasing numbers of pleasure trips. More and more, consumers seem to prefer long weekend getaways instead of lengthier vacations to more distant spots. Perhaps this reflects the rise in numbers of two-income households with more money but less free time (Standard and Poors 1996). Overall travel data also suggest an increasing trend toward shorter-duration trips—more daytrips and one-night visits—and shorter-distance trips. Heritage tourism compares well with these trends.
  2. Baby boomers are in or approaching their peak earning years and have discretionary income to spend. They represent great potential for the pleasure travel market. “The one thing baby-boomers have left to collect is experiences, and that’s what travel and the arts offer.” (Cook 1996)

In short, due to demographic reasons, such as the coming of age of baby boomers, and the evolving nature of travel in the United States (e.g., increasing numbers of short pleasure trips), heritage tourism is becoming a more potent force in the travel market as a whole (Gaede 1994).

**EXHIBIT 4.1**  
**Demographic Characteristics of U.S. Resident Travelers in 1994**

<b>Gender:</b>		
Male		59%
Female		41%
<b>Marital</b>	<b>Status:</b>	
Married		61
Not Married		39%
<b>Age:</b>		
18-34		36%
35-54		40%
55-75+		22%
No Answer		2%
<b>Average Age (years):</b>		44
<b>Completed College:</b>		26%
<b>Occupation:</b>		
Professional/managerial		40%
Other white collar		19%
Blue collar		12%
Retired		15%
Other		14%
<b>Family Income:</b>		
Less than \$20,000		11%
\$20,000-\$49,000		42%
\$50,000 or more		47%
<b>Household:</b>		
One person		15%
Two people		29%
Three or more people		56%
One wage earner		38%
Two wage earners		36%
Other		26%

*Source:* U.S. Travel Data Center's National Travel Survey, as published in  
*1994 Travel Market Report*

**EXHIBIT 4.2**  
**Measures of Impact of Travelers on the U.S. Economy in 1990**

Impact Measure	Direct Impact	Indirect & Induced Impact	Total Impact	Multiplier
Expenditures (Billions)	\$290.4	\$407.3	\$697.7	2.40
Earnings (Billions)	\$79.1	\$117.6	\$196.7	2.49
Employment (Millions)	5.2	5.3	10.5	1.92

*Source:* *Impact of Travel on State Economies, 1990*, U.S. Travel Data Center, October 1992

**HERITAGE TOURISM IN THE UNITED STATES**

Historic sites play a crucial role in fostering pleasure travel. As travel expert Arthur Frommer explained, “[p]eople travel in massive numbers to commune with the past. We all gain solace, pleasure and inspiration from contact with our roots.... [Y]ou cannot deny that seeing the cultural achievements of the past, as enshrined in period buildings, is one of the major motivators for travel.” (Frommer 1993)

Precise data on heritage tourism’s share of the overall travel market is not available. But various surveys report that historic site visits are increasingly included on family travel itineraries. Noting a 1993 *Better Homes and Garden Survey*, economist Tim Schiller (1996) wrote:

Historic sites are growing in popularity as destinations for pleasure trips: 40 percent of families traveling on vacation stop at historic sites. Several factors account for this increased interest. First, such trips tend to be less expensive than other types of vacations or pleasure travel. Second, family travel has increased, and often, historic sites are something of interest to all family members. Third, vacationers, especially family groups, are more concerned about adding educational opportunities to their vacation plans.

Heritage tourism’s burgeoning growth has also garnered business and government support.

1. American Express Travel Related Services underwrote the 1993 publication of *Getting Started: How to Succeed in Heritage Tourism*, by the National Trust for Historic Preservation. The booklet is designed to help communities combine the preservation of historic, cultural, and natural resources with tourism and help sustain local economies and community character.
2. Black heritage tourism is increasing exponentially, and African Americans have formed tour companies that focus on black cultural heritage throughout the U.S. (American Vision 1994).
3. The United States Travel and Tourism Administration and the Minority Business Development Agency began a joint economic initiative in 1990 to broaden awareness of minority historical and cultural tourist destinations and to bolster minority-owned businesses, particularly in travel and tourism. The multifaceted program is considered an initiative “to assist interested communities in preserving and celebrating their cultural identities through tourism.” (Doggett 1993)

The \$16 billion spent on the restoration of American historic sites since 1976 has produced a critical mass of saved resources in many communities (Travel Holiday 1996). As the number of preserved historic sites and neighborhoods mounts, new tourism “product” becomes available for both domestic and international visitors and the tourism-preservation cycle continues.

[T]he tourism industry needs more attractive, educational and authentic destinations to meet the needs of growing numbers of domestic and international travelers; the preservation community needs the political support and economic benefit that travelers provide to the sites and the communities they visit. That support and the resulting economic benefit are catalysts for continued protection, maintenance and promotion of these heritage areas. (*Touring Historic Places.*)

Recognition of heritage tourism's economic contribution (or potential) can be found throughout the country.

- More than 85 regional heritage areas are in varying phases of development across the U.S. These efforts reflect broad-based collaboration to protect a regional landscape, preserve historic resources, enhance recreation, or stimulate economic development and regional strength through tourism.
- An analysis of historic preservation's impact on Maryland's tourism industry found that visiting historic sites is one of the most popular activities among travelers. But, historic properties, responsible for generating a very large share of the state's tourism income, needed to be more widely promoted.
- In Virginia, the impact of travel to historic sites was found to be crucial to the state's economy.

Historic preservation visitors stay longer, visit twice as many places, and spend on average, over two-and-one-half times more money in Virginia than do other visitors. The economic impact of Colonial Williamsburg alone on Virginia's economy is over half a billion dollars a year. (Virginia 1996)

- A report on the economic impact of Wisconsin's heritage tourism program showed that visitors spent over \$215 million on admission fees alone to cultural/historic activities in 1995.

## **NEW JERSEY TRAVEL AND TOURISM MARKET OVERVIEW**

New Jersey's travel and tourism market is sizable and important economically. The 163 million adult trips made to New Jersey or within the state in 1995 generated \$11 billion in traveler expenditures<sup>1</sup>—approximately 3 percent of the state's gross domestic product. As an industry, travel is one of the state's three largest businesses—more important than construction, agriculture or mining. Travel creates almost 5 percent of all New Jersey jobs.

Much of the travel data for New Jersey is derived from the Longwoods International Travel survey. The New Jersey Division of Travel and Tourism hired Longwoods International in 1991 to monitor New Jersey travel. The Longwoods data include far more trips than those counted by the U.S. Data Center, described earlier. For example, the Longwoods New Jersey Travel Monitor tracks trips of less than 100 miles, but the U.S. Data Center does not. Besides capturing more of the shorter-distance (and hence shorter-duration) trips, the Longwoods data also reflect more visits by New Jerseyans and residents of nearby states than the national survey data does. Further background on the Longwoods survey is found in Appendix D of this study. The discussion which follows relies on the Longwoods survey data, unless otherwise noted.

Travel in New Jersey is overwhelmingly daytrip in nature. As shown in Exhibit 4.3, nearly eight out of ten trips are daytrips. The number of daytrips has fluctuated somewhat since 1993; the overnight market has been growing slightly.

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<sup>1</sup> There are varying estimates of travel expenditures in New Jersey. The ones reported in this chapter are figures developed from the Longwoods survey of travelers (see text). Longwoods information shows total travel outlays of about \$11 billion as of 1995. Other estimates of travel outlays in New Jersey (based in part on surveys of lodging places) are as high as \$23 billion. Thus, the figures reported in this chapter are at the lower, conservative end.



While there are many more day-trippers, the greater economic impacts come from the higher per traveler spending by overnights. Overnight visitors far outspend day visitors (\$157 per overnight trip in 1995 versus \$47 per daytrip).

**EXHIBIT 4.3**  
**New Jersey Travel Adult Trips (1993-1995) (in Millions)**

	1993		1994		1995	
	Trips	%	Trips	%	Trips	%
Daytrips	130.5	78.7%	137.1	79.3%	127.1	77.9%
Overnights	<u>35.3</u>	<u>21.3%</u>	<u>35.8</u>	<u>20.7%</u>	<u>36.1</u>	<u>22.1%</u>
Total Trips	165.8	100.0%	172.9	100.0%	163.2	100.0%

*Source:* Longwoods International and Center for Urban Policy Research, Rutgers University

Whether on a day or overnight trip, nearly three-fourths of all travelers come to New Jersey to visit friends or relatives, casinos or the beach. Longwoods International summed up the New Jersey travel market as:

- convenience-driven
- narrowly focused on beach and casino resort segments
- concentrated in Atlantic City and shore regions
- limited by the state’s negative image of being urbanized, polluted and unsafe.

Longwoods recommended that the state improve the stability and strength of the New Jersey travel market by emphasizing the “touring” vacation. The firm noted that there is a “natural fit between New Jersey’s [travel] product and the specific interests of touring vacationers: landmarks, historic places, scenery, and interesting places to explore.” (Longwoods 1993)

Longwoods also found that New Jersey’s proportion of overnight touring vacationers was underdeveloped compared to national norms—three percent for New Jersey versus nine percent for the United States. Touring vacations could be a long-term growth vehicle for the state’s travel business and could help diversify the state’s reliance on beach and casino trips, which face stiff competition from other states.

In summary, heritage travel is very important to New Jersey on numerous interrelated counts:

1. It has the potential to increase overall travel and tourism in the state with attendant economic benefits.
2. It has the potential of broadening the state’s travel objectives, now overly concentrated at the shore and the casinos (Atlantic City).
3. Heritage tourism can increase overnight touring travel in the state—a sector which is currently underdeveloped compared to national norms. Overnight travelers spend more than day-trippers and thus generate greater economic benefits.
4. Likewise, heritage tourism can lure travelers from farther away than the state’s “traditional” Mid-Atlantic market.

5. New Jersey is rich in historic and other sites (e.g., sites of ethnic and/or minority interest), which are at the core of heritage travel.
6. Increased heritage travel to New Jersey can alter the state's negative image as an unattractive destination.

As elsewhere, heritage travel in New Jersey can benefit from changes occurring generally in the county and from specific trends affecting travel. These include: an aging population; a population with enhanced interest in education, tradition, and roots; a large baby-boom population with discretionary income; and an increase in family travel, domestic travel, and shorter-duration and shorter-distance trips.

To obtain a better sense of heritage tourism in New Jersey, it behooves us to examine in greater detail the profile and scope of the state's current heritage travelers.

### **NEW JERSEY HERITAGE TOURISM**

The Center for Urban Policy Research (CUPR) at Rutgers University has analyzed Longwoods International's New Jersey travel information for the period 1993-1995. While the Longwoods data are not focused on heritage tourism per se, the survey results can be assembled for such an analysis, as detailed in Appendix D. Using the base survey data, CUPR and Longwoods identify the following groups and subgroups of New Jersey tourists.

#### **Overnight Visitors:**

1. *All New Jersey overnight travelers*: all overnight visitors.
2. Heritage tourists—
  - a. *Primary Heritage Overnights*: Overnight visitors whose exclusive or primary interest is of a heritage nature.
  - b. *Partial Heritage Overnights*: Overnight visitors who spend part of their trip on historic activities, but these activities are likely not the exclusive or main trip purpose.
3. *Non-heritage Overnights*: Overnight visitors who are neither heritage tourists nor primary heritage tourists.

For day-trippers, because of the more limited information on this group, similar but not identical groups are identified.

#### **Daytrip Tourists:**

1. *All New Jersey Daytrip Travelers*: All daytrip visitors.
2. *Heritage Day-trippers*: Day-trippers having some identifiable historic trip purpose. Excluded from the heritage day-tripper group are casino patrons. (Casino visitors dominate the New Jersey day-tripper category.)
3. *Non-heritage Day-trippers*: Day-trippers who do not participate in historic activities (i.e., are not identified as daytrip heritage tourists).

Thus, for both the overnight visitors and day-trippers, an overall traveler group is identified, as well as non-heritage and heritage tourists. The difference, however, is that with the overnight visitors, two “levels” of heritage tourists (“partial heritage overnighiter” and “primary heritage overnighiter”) are demarcated, while for the day-trippers only one category of heritage visitor (“heritage day-tripper”) is identified. Information about each respective category and subcategory follows.

### **Scale of Heritage Travel**

As indicated in Exhibits 4.4A and 4.4B, there were a total of 394,731,905 adult daytrips of all types in New Jersey and 107,264,618 overnight adult trips of all types during three years 1993 to 1995. Annually that averages to 131,577,302 daytrips and 35,754,873 overnight trips.

From 1993 to 1995, there was an average of 4,982,809 heritage daytrips per year—3.8 percent of all daytrips (Exhibit 4.4A). From 1993 to 1995, there was an average 4,076,575 overnight heritage trips per year of which 657,761 are flagged as being primary heritage overnighiters. Heritage trips as a group comprised 11.4 percent of all New Jersey overnight trips, while the primary heritage overnighiters constituted, as expected, a smaller share—1.8 percent (Exhibit 4.4B).

In short, heritage tourism in New Jersey is a noticeable, but still very modest part of the state’s travel market. According to CUPR-Longwoods, heritage travel’s 9.1 million average annual trips (day and overnight trips) to New Jersey accounted for approximately 5.4 percent of all state travel in the 1993-1995 period (Exhibit 4.4C).

### **Who Travels to New Jersey’s Historic Sites?**

Overnight heritage visitors—both primary and partial—are mostly comprised of *married adults with an average age of about 45* (Exhibit 4.5). The overnight visitor is more likely to be female than male, especially the primary heritage overnighiter. These characteristics are not that distinct from that of the average non-heritage overnighiter.

More than 80 percent of all overnight heritage travelers (primary and partial) have at least some college education, and their average annual income is in the \$40,000 to \$45,000 range. Average non-heritage overnighiters are somewhat less educated and have somewhat lower incomes (\$38,000 to \$40,000 per year). Like most overnight travelers in New Jersey, heritage overnighiters predominantly hold full-time, white collar jobs. More than one out of every four partial heritage overnighiters (and one out of every three primary heritage overnighiters) is a New Jerseyan—a significantly higher ratio than non-heritage overnighiters. Both subgroups of heritage overnighiters are somewhat less likely to have traveled from outside the Mid-Atlantic region, leading to the conclusion that the out-of-immediate-region potential of overnight heritage travel is presently not realized. Finally, about 90 percent of all heritage overnighiters are white.

Daytrip heritage visitors are also mostly married adults with an average age of 45; half are female (Exhibit 4.6). Three-fourths of daytrip heritage tourists have at least some college education, and their average family income is in the \$45,000 to \$50,000 range—considerably more than non-heritage day-trippers, whose average family income is in the \$38,000 to \$40,000 range. Heritage daytrip travelers are much less likely to

**EXHIBIT 4A  
New Jersey Daytrip Distribution**

<b>Period</b>	<b>Total NJ Trips</b> (Trips) (% of NJ Total)		<b>Heritage</b> (Trips) (%) of NJ Total)		<b>Non-Heritage</b> (Trips) (% of NJ Total)	
<b>Annual Average 1993-1995</b>	131,577,302	100%	4,982,809	3.8%	126,594,493	96.2%
<b>Total 1993-1995</b>	394,731,905	100%	14,948,427	3.8%	379,783,478	96.2%

**EXHIBIT 4B  
New Jersey Overnight Trip Distribution**

<b>Period</b>	<b>Total NJ Overnight Trips</b> (Trips) (%) of NJ Total)		<b>Partial Heritage</b> (Trips) (% of NJ Total)		<b>Primary Heritage</b> (Trips) (% of NJ Total)		<b>Total Partial and Primary Heritage</b> (Trips) (% of NJ Total)		<b>Non-Heritage</b> (Trips) (% of NJ Total)	
<b>Annual Average 1993-1995</b>	35,754,873	100%	3,419,114	9.6%	657,761	1.8%	4,076,875	11.4%	31,677,998	88.6%
<b>Total 1993-1995</b>	107,264,618	100%	10,257,342	9.6%	1,973,283	1.8%	12,230,625	11.4%	95,033,993	88.6%

**EXHIBIT 4C  
New Jersey Total Trip Distribution  
Daytrip and Overnight**

<b>Period</b>	<b>Total NJ Trips</b> (Trips) (% of NJ Total)		<b>Heritage</b> (Trips) (% of NJ Total)		<b>Non-Heritage</b> (Trips) (% of NJ Total)	
<b>Annual Average 1993-1995</b>	167,332,175	100%	9,059,684	5.4%	158,272,491	94.6%
<b>Total 1993-1995</b>	501,996,523	100%	27,179,052	5.4%	474,817,471	94.6%

*Notes:* All trips are adult trips.  
 Partial Heritage = spend part of their trip on heritage activities.  
 Primary Heritage = spend all or most of their time on heritage activities.

*Source:* Longwoods International/Rutgers University Center for Urban Policy Research, 1997

**EXHIBIT 4.5**  
**Overnight Visitors: Demographics**

<b>DEMOGRAPHICS</b>	<b>All New Jersey Overnighters</b>	<b>Non-Heritage Overnighters</b>	<b>Partial Heritage Overnighters</b>	<b>Primary Heritage Overnighters</b>
<b><u>Gender</u></b>				
Male	48%	47%	49%	37%
Female	52%	53%	51%	63%
<b><u>Marital Status</u></b>				
Married	57%	57%	60%	58%
Not married	43%	43%	40%	42%
<b><u>Age</u></b>				
18-24 years	6%	6%	5%	15%
25-34 years	26%	26%	24%	11%
35-44 years	22%	21%	26%	36%
45-54 years	18%	18%	17%	9%
55-64 years	13%	13%	10%	13%
65 and over	15%	15%	18%	16%
Average age	45	45	46	45
<b><u>Education</u></b>				
High school or less	23%	23%	19%	16%
Some college	30%	30%	30%	35%
College graduate	27%	27%	30%	38%
Post-graduate	20%	20%	21%	11%
<b><u>Family Income</u></b>				
Less than \$20,000	13%	13%	12%	12%
\$20,000-\$29,000	13%	13%	8%	7%
\$30,000-\$39,000	14%	14%	13%	10%
\$40,000-\$49,000	15%	15%	16%	17%
\$50,000-\$74,999	25%	25%	25%	39%
\$75,000 or more	21%	20%	26%	15%
Average income range *	\$37.5K - \$39.9K	\$37.5K - \$39.9K	\$40K - \$45K	\$40K - \$45K

**EXHIBIT 4.5 (continued)**

<b>DEMOGRAPHICS</b>	<b>All New Jersey Overnighters</b>	<b>Non-Heritage Overnighters</b>	<b>Partial Heritage Overnighters</b>	<b>Primary Heritage Overnighters</b>
<b><u>Household Size</u></b>				
1 member	27%	27%	25%	35%
2 members	35%	35%	37%	33%
3 members	15%	15%	17%	12%
4 members	15%	15%	15%	19%
5 members or more	8%	8%	5%	1%
Average Household Size	2	2	2	2
<b><u>No child in household</u></b>	56%	56%	55%	63%
<b><u>Occupation</u></b>				
Managerial/ professional	43%	43%	45%	38%
Other white collar	20%	20%	17%	27%
Blue collar	6%	6%	7%	4%
Retired/student/other	31%	31%	31%	31%
<b><u>Employment</u></b>				
Full time	64%	64%	63%	64%
Part time	11%	11%	12%	14%
Retired	16%	16%	17%	16%
Not employed	8%	8%	7%	6%
<b><u>Race</u></b>				
White	82%	81%	87%	96%
African American	13%	14%	6%	4%
Other	3%	3%	7%	0%
<b><u>State of Residence</u></b>				
NJ	17%	16%	27%	34%
NY	21%	22%	16%	13%
PA	17%	17%	15%	15%
Other	45%	45%	42%	39%

EXHIBIT 4.5 (continued)

DEMOGRAPHICS	All New Jersey Overnighters	Non-Heritage Overnighters	Partial Heritage Overnighters	Primary-Heritage Overnighters
<b>Residence—</b>				
<b><u>Geographic Region</u></b>				
New England	9%	9%	6%	4%
Mid-Atlantic	55%	55%	58%	61%
East North Central	8%	8%	6%	18%
West North Central	1%	1%	2%	0%
South Atlantic	20%	20%	18%	12%
East South Central	1%	2%	1%	3%
West South Central	2%	2%	3%	0%
Mountain	1%	2%	0%	1%
Pacific	3%	3%	7%	1%

Note: Details may not total 100% due to rounding.

\* Interval estimate based on a variable of 24 income ranges and rounding the corresponding mean code values to the nearest tenth.

Partial Heritage = spend part of their trip on heritage activities

Primary Heritage = spend all or most of their trip on heritage activities

have a child in the household than non-heritage day-trippers, and much more likely to have full-time employment in a white-collar job. Day-trippers who visit New Jersey's historic sites are predominantly New Jerseyans (66 percent), as compared to non-heritage day-trippers (only 30 percent of whom are New Jerseyans.) And like overnight heritage visitors, daytrip heritage tourists are overwhelmingly white (95 percent), compared to non-heritage day-trippers (77 percent white).

In summary, although oversimplified, *the profile of the heritage traveler in New Jersey leans towards middle-aged, married, Caucasian adults who are relatively well-educated and have middle or higher incomes.*

### What Are New Jersey Heritage Trips Like?

Overnight heritage travelers *stay longer and travel in larger groups* than non-heritage overnighters. (See Exhibit 4.7.) Primary heritage travelers visit with significantly larger travel groups (4.6 people on average in the party versus 2.4 people for non-heritage overnighters). They spend more time here (average stay of 3.2 nights) than non-heritage overnighters (average stay of 2.7 nights); but overnight visitors who combine heritage activities with other activities spend even more time in New Jersey—4.7 nights on average; they also travel in somewhat larger groups (3.2 party size).

Overnight heritage visitors *plan their trip somewhat further ahead* than non-heritage tourists; about 60 percent of all (primary and partial) heritage overnighters plan their trips 2 months or more in advance versus 47 percent of non-heritage overnighters.

Like most New Jersey travelers, heritage overnighters are *repeat visitors*; about 90 percent of all (primary and partial) heritage overnighters have traveled to the state



**EXHIBIT 4.6**  
**Day Trip Visitors: Demographics**

<b>DEMOGRAPHICS</b>	<b>All New Jersey Day-trippers</b>	<b>Non-Heritage Day-trippers</b>	<b>Heritage Day-trippers</b>
<b><u>Gender</u></b>			
Male	54%	54%	51%
Female	46%	46%	49%
<b><u>Marital Status</u></b>			
Married	58%	57%	77%
Not married	42%	43%	23%
<b><u>Age</u></b>			
18-24 years	11%	11%	0%
25-34 years	22%	22%	19%
35-44 years	26%	25%	43%
45-54 years	17%	17%	18%
55-64 years	10%	10%	16%
65 and over	15%	15%	3%
Average age	43	43	45
<b><u>Education</u></b>			
High school or less	30%	30%	26%
Some college	23%	23%	26%
College graduate	31%	31%	30%
Post-graduate	16%	16%	18%
<b><u>Family Income</u></b>			
Less than \$15,000	10%	11%	0%
\$15,000 - \$24,999	12%	12%	3%
\$25,000 - \$39,999	20%	20%	28%
\$40,000 - \$49,999	14%	14%	5%
\$50,000 - \$74,999	24%	23%	43%
\$75,000 - \$99,999	14%	14%	10%
\$100,000 +	7%	7%	10%
Average income range	\$37.5K - \$40K	\$37.5K - \$40K	\$45K - \$50K

*Note:* Details may not add to 100% due to rounding.



**EXHIBIT 4.6 (continued)**

<b>DEMOGRAPHICS</b>	<b>New Jersey Day-trippers</b>	<b>Non-Heritage Day-trippers</b>	<b>Heritage Day-trippers</b>
<b><u>Household Size</u></b>			
1 member	27%	28%	20%
2 members	29%	30%	14%
3 members	18%	18%	18%
4 members	15%	15%	32%
5 or more members	10%	10%	17%
Average Household Size	3	2	3
<b><u>No child in household</u></b>	52%	32%	65%
<b><u>Occupation</u></b>			
Managerial/professional	41%	41%	63%
Other white collar	14%	15%	3%
Blue collar	14%	15%	8%
Retired/student/other	30%	30%	26%
<b><u>Employment*</u></b>			
Full time	66%	65%	78%
Part time	9%	9%	5%
Retired	13%	13%	12%
Not employed	8%	8%	5%
	96%	95%	100%
<b><u>Race</u></b>			
White	77%	76%	95%
African American	11%	11%	5%
Other	12%	13%	0%
<b><u>State of Residence</u></b>			
NJ	31%	30%	66%
NY	38%	39%	8%
PA	20%	20%	11%
Other state	11%	11%	15%

*Note:* Details may not add to 100% due to rounding.

\* Not adjusted for non-response.

**EXHIBIT 4.7**  
**OVERNIGHT VISITORS: TRIP CHARACTERISTICS**

TRIP CHARACTERISTICS	All New Jersey Overnighters	Non-Heritage Overnighters	Partial Heritage Overnighters	Primary Heritage Overnighters
<b><u>Travel Party Size</u></b>				
One	20%	21%	11%	11%
Two	43%	43%	41%	45%
Three	11%	11%	18%	10%
Four	13%	13%	13%	21%
Five or more	13%	13%	18%	13%
Average travel party size	3.0	2.9	3.2	4.6
Average number of adults per party	2.5	2.4	2.6	4.6
<b><u>Length of Stay *</u></b>				
1 night	17%	18%	6%	26%
2-3 nights	33%	33%	38%	43%
4-5 nights	23%	22%	39%	27%
10 or more nights	4%	4%	8%	1%
Average # of nights	2.9	2.7	4.7	3.2
<b><u>Lodging</u></b>				
Hotel/motel/inn/b&b/rented condo	59%	62%	54%	84%
Rented campground/trailer park site	2%	1%	4%	6%
Private homes	36%	37%	44%	11%
Other	2%	2%	2%	1%
<b><u>Prior NJ visit</u></b>				
yes	92%	92%	93%	88%
no	8%	8%	7%	12%
<b><u>Spending on Trip</u></b>				
Less than \$100	33%	35%	18%	18%
\$100 to < \$249	24%	24%	22%	20%
\$250 to <\$499	20%	20%	18%	25%
\$500 to < \$749	10%	9%	16%	17%
\$750 to <\$999	5%	5%	6%	5%
\$1000 or more	8%	7%	20%	15%

*Note:* Details may not total 100% due to rounding.

\* Excludes nights spent outside NJ.

**EXHIBIT 4.7 (continued)**

<b>TRIP CHARACTERISTICS</b>	<b>New Jersey Overnighters</b>	<b>Non-Heritage Overnighters</b>	<b>Partial Heritage Overnighters</b>	<b>Primary Heritage Overnighters</b>
<b><u>Trip Planning</u></b>				
More than one year	2%	2%	5%	1%
6 to 12 months	10%	10%	15%	12%
3 to 5 months	14%	14%	17%	28%
2 months	18%	18%	21%	18%
1 month or less	53%	53%	41%	39%
DK or did not respond	3%	3%	2%	2%
<b><u>Overall Trip Experience Rating</u></b>				
Superior	11%	10%	21%	16%
Above average	34%	33%	45%	49%
Average	43%	44%	30%	31%
Below average	5%	5%	3%	2%
Poor	1%	1%	0%	0%
DK or did not respond	6%	7%	1%	2%
Poor	1%	1%	0%	0%
Average overall trip rating	Average	Average	Above Average	Above Average
<b><u>Distance Traveled From Home</u></b>				
Under 50 miles	6%	6%	6%	7%
50 - 99 miles	18%	18%	17%	16%
100 - 299 miles	36%	35%	41%	52%
300 - 499 miles	15%	15%	10%	12%
500 - 1,000 miles	13%	13%	10%	9%
Over 1,000 miles	13%	13%	16%	3%
Average distance traveled *	300 miles	300 miles	300 miles	220 miles
<b><u>Trip Type (distribution of adult trips)</u></b>				
Visit friends or relatives	37%	38%	39%	-
Casino trip	22%	24%	5%	-
Ocean beach resort trip	13%	12%	28%	-
Touring trip	4%	3%	2%	100%
Business trip	9%	10%	5%	-
Special event trip	4%	5%	4%	-
Combined business/pleasure trip	3%	3%	4%	-
Outdoors trip	2%	2%	4%	-

**EXHIBIT 4.7 (continued)**

<b>TRIP CHARACTERISTICS</b>	<b>New Jersey Overnighters</b>	<b>Non-Heritage Overnighters</b>	<b>Partial Heritage Overnighters</b>	<b>Primary Heritage Overnighters</b>
Theme park trip	1%	2%	-	-
City trip	1%	1%	4%	-
Country resort trip	1%	1%	2%	-
Ski trip	0%	0%	-	-
Cruise vacation	0%	0%	0%	-
Other	1%	0%	2%	-

*Note:* Details may not total 100% due to rounding.

\* Estimates based on mean coded values weighted within the estimated mean distance range of 200 to 400 miles.

before. But heritage travelers differ from other New Jersey overnighters in one sense: they *give their trip experiences a higher overall positive rating*. About 65 percent of both the primary and partial heritage overnighters consider their New Jersey trip experience above average or superior versus only 43 percent of non-heritage overnighters.

Daytrip heritage tourists also travel in larger groups than non-heritage day-trippers (see Exhibit 4.8). Daytrip heritage visitors tour with an average travel party size of 5, comprised of an average 1.3 children and 3.7 adults, compared to non-heritage day-trippers who have an average party size of 4, 0.6 children and 3.4 adults. This suggests that many heritage daytrips *may be family trips*.

In short, the profile of *the heritage trip compared to all New Jersey trips is one of longer duration; a trip in a group (often as part of a family trip); one that is planned further in advance and from which the travelers derive a higher level of satisfaction*.

### **What Do Heritage Tourists Spend in New Jersey?**

Partial heritage overnighters spent an average \$252 per adult trip (Exhibit 4.9). This *spending level is much higher than that of non-heritage tourists* (who spent an average of \$147 per adult), and those who traveled to the state primarily for heritage tourism, who spend an average \$101 per adult trip.

Partial heritage overnighters, on average, stayed longer (4.7 nights) in New Jersey than either the non-heritage or primary heritage overnigher; this helps explain the higher average per trip expenditures on accommodations and restaurant food and beverage. Restaurant food and beverage totals \$68 per trip for the partial heritage overnigher compared to the \$40 for the primary heritage overnigher and \$38 for the non-heritage overnigher. Primary heritage overnighters, who had a much shorter average distance traveled (220 miles) than partial heritage overnighters (300 miles) and non-heritage overnighters (300 miles), also spent much less on accommodations, vehicle expense and sightseeing and recreation than other overnighters (Exhibits 4.9 and 4.10).

In general, daytrip heritage visitors (Exhibit 4.11) *spent much more* (\$56 per adult) than non-heritage day tourists (\$46 per adult), but they spent considerably more on restaurant food and beverage and retail purchases such as antiques, crafts, gifts and souvenirs, than non-heritage tourists, for example, but significantly less on transportation and recreation.



**EXHIBIT 4.8**  
**Daytrip Visitors: Trip Characteristics**

<b>TRIP CHARACTERISTICS</b>	<b>All New Jersey Day-trippers</b>	<b>Non-Heritage Day-trippers</b>	<b>Heritage Day-trippers</b>
<b><u>Travel Party Size</u></b>			
One	23%	23%	7%
Two	36%	36%	35%
Three	13%	13%	2%
Four	17%	17%	23%
Five or more	12%	11%	34%
Average travel party size	4.1	4.0	5.0
Average adults per travel party	3.4	3.4	3.7
<b><u>Spending on Trip</u></b>			
Less than \$100	64%	65%	37%
\$100 to <\$249	21%	21%	24%
\$250 to <\$499	8%	8%	25%
\$500 or more	7%	6%	14%
<b><u>Trip Type</u></b>			
Visit friends or relatives	33%	32%	51%
Casino trip	24%	25%	0%
Special event trip	9%	9%	0%
Theme park trip	8%	8%	0%
Business trip	6%	7%	0%
Ocean beach resort trip	6%	6%	0%
City trip	5%	5%	0%
Outdoors trip	3%	2%	30%
Touring trip	2%	2%	19%
Ski trip	1%	1%	0%
Country resort trip	0%	0%	0%
Other	4%	4%	0%

*Note:* Details may not add to 100% due to rounding.



**EXHIBIT 4.9**  
**Overnight Visitors: Average Trip Expenditures per Adult**

	All New Jersey Overnighters	Non-Heritage Overnighters	Partial Heritage Overnighters	Primary Heritage Overnighters
<b><u>Total Trip Average</u></b>	<b>\$156.50</b>	<b>\$147.43</b>	<b>\$251.54</b>	<b>\$100.70</b>
<b><u>Accommodations</u></b>	<b>\$49.86</b>	<b>\$47.90</b>	<b>\$71.27</b>	<b>\$32.05</b>
<b><u>Restaurant Food &amp; Beverage</u></b>	<b>\$41.22</b>	<b>\$38.37</b>	<b>\$67.88</b>	<b>\$40.24</b>
Breakfast	\$6.01	\$5.74	\$8.72	\$4.60
Lunch	\$8.35	\$7.73	\$14.03	\$8.35
Dinner	\$23.21	\$21.51	\$39.04	\$23.33
Snack purchases	\$3.66	\$3.39	\$6.10	\$3.96
<b><u>Retail</u></b>	<b>\$24.98</b>	<b>\$23.32</b>	<b>\$59.25</b>	<b>\$17.61</b>
Antiques/crafts	\$1.79	\$1.18	\$7.59	\$2.03
Gifts/souvenirs	\$10.23	\$9.04	\$22.07	\$6.97
Liquor/wine/beer	\$2.80	\$2.47	\$6.24	\$1.40
Drug/groceries	\$5.78	\$5.14	\$12.12	\$4.08
Sports equipment/clothing	\$3.25	\$2.84	\$7.35	\$2.19
Other retail	\$1.07	\$1.08	\$1.12	\$0.37
<b><u>Vehicle Expenses</u></b>	<b>\$15.24</b>	<b>\$15.19</b>	<b>\$17.50</b>	<b>\$5.65</b>
Gasoline	\$8.06	\$7.85	\$10.64	\$4.58
Parking	\$0.87	\$0.85	\$1.13	\$0.37
Rentals	\$4.38	\$4.50	\$4.03	\$0.06
Repairs	\$1.02	\$1.11	\$0.31	\$0.00
Other	\$1.94	\$1.99	\$1.71	\$0.64
<b><u>Sightseeing &amp; Recreation</u></b>	<b>\$24.22</b>	<b>\$21.06</b>	<b>\$38.06</b>	<b>\$5.72</b>
Boardwalk activities	\$2.77	\$2.57	\$5.18	\$0.28
Bars/discos/nightclubs	\$2.22	\$2.22	\$2.64	\$0.00
Entertainment/shows	\$4.99	\$4.61	\$9.45	\$0.12
Guided tours	\$0.10	\$0.01	\$0.96	\$0.23
Landmarks/historic sites	\$0.31	\$0.03	\$2.40	\$3.03
Museums/science exhibits	\$0.14	\$0.09	\$0.54	\$0.28
Other activities	\$13.69	\$11.52	\$16.88	\$1.79

**EXHIBIT 4.10**  
**Overnight Visitors: Average Daily Expenditures per Adult**

	All New Jersey Overnighters	Non-Heritage Overnighters	Partial Heritage Overnighters	Primary Heritage Overnighters
<b><u>Daily Trip Average</u></b>	<b>\$54.22</b>	<b>\$54.45</b>	<b>\$53.72</b>	<b>\$31.10</b>
<b><u>Accommodations</u></b>	<b>\$17.27</b>	<b>\$17.69</b>	<b>\$15.22</b>	<b>\$9.90</b>
<b><u>Restaurant Food &amp; Beverage</u></b>	<b>\$14.28</b>	<b>\$14.17</b>	<b>\$14.50</b>	<b>\$12.43</b>
Breakfast	\$2.08	\$2.12	\$1.86	\$1.42
Lunch	\$2.89	\$2.86	\$3.00	\$2.58
Dinner	\$8.04	\$7.94	\$8.34	\$7.21
Snack purchases	\$1.27	\$1.25	\$1.30	\$1.22
<b><u>Retail</u></b>	<b>\$8.66</b>	<b>\$8.61</b>	<b>\$12.65</b>	<b>\$5.44</b>
Antiques/crafts	\$0.62	\$0.44	\$1.62	\$0.63
Gifts/souvenirs	\$3.54	\$3.34	\$4.71	\$2.15
Liquor/wine/beer	\$0.97	\$0.91	\$1.33	\$0.43
Drug/groceries	\$2.00	\$1.90	\$2.59	\$1.26
Sports equipment/clothing	\$1.12	\$1.05	\$1.57	\$0.68
Other retail	\$0.37	\$0.40	\$0.24	\$0.12
<b><u>Vehicle Expenses</u></b>	<b>\$5.28</b>	<b>\$5.61</b>	<b>\$3.74</b>	<b>\$1.74</b>
Gasoline	\$2.79	\$2.90	\$2.27	\$1.41
Parking	\$0.30	\$0.31	\$0.24	\$0.12
Rentals	\$1.52	\$1.66	\$0.86	\$0.02
Repairs	\$0.35	\$0.41	\$0.07	\$0.00
Other	\$0.67	\$0.73	\$0.36	\$0.20
<b><u>Sightseeing &amp; Recreation</u></b>	<b>\$8.39</b>	<b>\$7.78</b>	<b>\$8.13</b>	<b>\$1.77</b>
Boardwalk activities	\$0.96	\$0.95	\$1.11	\$0.08
Bars/discos/nightclubs	\$0.77	\$0.82	\$0.56	\$0.00
Entertainment/shows	\$1.73	\$1.70	\$2.02	\$0.04
Guided tours	\$0.04	\$0.00	\$0.21	\$0.07
Landmarks/historic sites	\$0.11	\$0.01	\$0.51	\$0.94
Museums/science exhibits	\$0.05	\$0.03	\$0.12	\$0.09
Other activities	\$4.74	\$4.26	\$3.61	\$0.55

**EXHIBIT 4.11**

**Daytrip Visitors: Average Transportation Expenditures per Adult**

	<b>All New Jersey Day-trippers</b>	<b>Non-Heritage Day-trippers</b>	<b>Heritage Day-trippers</b>
<b><u>Total Trip Average</u></b>	<b>\$46.66</b>	<b>\$46.32</b>	<b>\$55.51</b>
<b><u>Transportation/Vehicle Expenses</u></b>	<b>\$6.67</b>	<b>\$6.77</b>	<b>\$4.25</b>
Rentals	\$0.54	\$0.56	\$0.00
Gasoline	\$3.44	\$3.43	\$3.68
Parking	\$0.50	\$0.51	\$0.14
Repairs	\$1.65	\$1.71	\$0.00
Commercial fares	\$0.37	\$0.39	\$0.00
Other	\$0.17	\$0.16	\$0.43
<b><u>Restaurant Food &amp; Beverage</u></b>	<b>\$11.72</b>	<b>\$11.32</b>	<b>\$21.88</b>
Breakfast	\$1.48	\$1.43	\$2.60
Lunch	\$2.83	\$2.74	\$5.08
Dinner	\$6.08	\$5.86	\$11.85
Snacks	\$1.33	\$1.29	\$2.35
<b><u>Retail</u></b>	<b>\$8.24</b>	<b>\$8.08</b>	<b>\$12.06</b>
Drug/groceries	\$1.63	\$1.64	\$1.30
Gifts/souvenirs	\$2.84	\$2.76	\$4.77
Sports equipment/clothing	\$1.06	\$1.02	\$1.95
Antiques/crafts	\$0.81	\$0.75	\$2.23
Liquor/wine/beer	\$0.87	\$0.84	\$1.78
Other retail	\$1.04	\$1.06	\$0.03
<b><u>Recreation &amp; Sightseeing</u></b>	<b>\$20.04</b>	<b>\$20.15</b>	<b>\$17.32</b>
Boardwalk activities	\$1.98	\$1.95	\$2.91
Bars/discos/nightclubs	\$1.76	\$1.81	\$0.60
Entertainment/shows	\$3.11	\$3.17	\$1.66
Short guided tours	\$0.11	\$0.11	\$0.00
Landmarks/historic sites	\$0.22	\$0.19	\$0.83
Museums/science exhibits	\$0.25	\$0.24	\$0.49
Other activities	\$12.60	\$12.68	\$10.82
<b><u>Average Total Trip Spending</u></b>	<b>\$46.66</b>	<b>\$46.32</b>	<b>\$55.51</b>
Transportation/Vehicle Expenses	\$6.67	\$6.77	\$4.25
Restaurant Food & Beverage	\$11.72	\$11.32	\$21.88
Retail	\$8.24	\$8.08	\$12.06
Recreation & Sightseeing	\$20.04	\$20.15	\$17.32

## ECONOMIC IMPACTS OF NEW JERSEY HERITAGE TOURISM

As previously indicated, there are an average of 4,982,809 heritage day-trippers annually in New Jersey, and the per capita day-tripper expenditure is about \$56—which translates into a total annual outlay for this group of \$276,591,487.

There are, on average, 657,761 primary heritage overnighers in New Jersey annually. At an average outlay of about \$101, this group generates total direct outlays of \$66,234,253 (Exhibit 4.12A).

The 3,419,114 annual partial heritage overnighers spend far more—about \$252 per trip—for an annual outlay by this group of \$860,043,650. Since they spend only a portion of this sum on heritage-related matters, however, it would be unfair to credit the full \$860 million trip expenditure to heritage tourism. CUPR, working with Longwoods, has therefore estimated the share of the total outlay by the partial heritage overnighers that could realistically be credited to heritage purposes. For instance, a business traveler staying overnight in Princeton who visited the Princeton Historic Society (at Bainbridge House) at some point in the trip would likely have made the lion's share of his travel expenditures for purposes other than heritage tourism. CUPR-Longwoods estimates that on average the partial heritage overnigher spends about 10.4 percent of the total average trip outlay (\$252) for heritage purposes. Thus, the 3,419,114 partial heritage overnighers spend about \$89,278,676 for heritage-related activities (see Exhibit 4.12B).

Direct outlays of New Jersey's heritage travelers include:

<b>Group</b>	<b>Outlay</b>
Heritage Day-trippers	\$276,591,487
Primary Heritage Overnighers	\$66,234,253
Partial Heritage Overnighers	<u>\$89,278,676</u>
Subtotal of Primary and Partial	\$155,512,929
All Heritage Travelers	<u>\$432,104,416</u>

**EXHIBIT 4.12A**  
**Spending by New Jersey Heritage Tourists**

	<b>Annual Number of Heritage Tourists</b>	<b>Average Expenditure Each Trip</b>	<b>Heritage- Attributed Expenditures Per Trip</b>		<b>Total Annual Expenditures</b>
			<b>%</b>	<b>\$</b>	
<b>DAYTRIP</b>					
Heritage Visitor	4,982,809	\$55.51	100%	\$55.51	\$276,591,487
<b>OVERNIGHT</b>					
Partial Heritage	3,419,114	\$251.54	10.4%	\$26.16	\$89,278,676
Primary Heritage	657,761	\$100.70	100%	\$100.70	\$66,234,253
Overnight	4,076,875				\$155,512,929
Subtotal					
<b>TOTAL</b>					
Daytrip and Overnight	9,059,684				\$432,104,416

NA = Not applicable

Source: Longwoods International/Rutgers University Center for Urban Policy Research, 1997

**EXHIBIT 4.12B**  
**Spending by All New Jersey Tourists**

	<b>Annual Number of Heritage Tourists</b>	<b>Average Expenditure Each Trip</b>	<b>Heritage- Attributed Expenditures Per Trip</b>	<b>Total Annual Expenditures</b>
<b>DAYTRIP</b>	131,577,302	\$46.66	NA	\$6,139,396,911
<b>OVERNIGHT</b>	35,754,873	\$156.50	NA	\$5,596,637,623
<b>TOTAL</b>	167,332,175			\$11,736,034,534

NA = Not applicable

Source: Longwoods International/Rutgers University Center for Urban Policy Research, 1997

These heritage expenditures relative to the total spending for all New Jersey travel is shown below.

**Annual Total Trip Spending for New Jersey**

<b>Trip Type</b>	<b>Total New Jersey Trip Spending</b>	<b>Heritage Trip Spending</b>	<b>Heritage as % of Total New Jersey</b>
Daytrip	\$6,140 million	\$277 million	4.5%
Overnight	<u>\$5,597 million</u>	<u>\$156 million</u>	<u>2.8%</u>
All Trips (Day and Overnight)	\$11,737 million	\$433 million	3.7%

