

Delaware Bayshore Tourism Survey Results Cumberland County, NJ



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Executive Summary

Several recent planning efforts in Cumberland County have resulted in strategic plans focused on a suite of tourism strategies. Yet little data exists on current visitors to Cumberland County's Delaware Bayshore. The Nature Conservancy in New Jersey therefore carried out a visitor survey from spring to fall 2015 to help fill that data gap. From the 250 responses, we found that: respondents were highly satisfied with their experience and would return to the Cumberland County Delaware Bayshore; respondents spent money on meals in local restaurants; birding and wildlife viewing was a top activity of interest; respondents were nearly equally interested in ecotourism and historic/cultural activities; and visitors that responded came from all across New Jersey and almost a dozen different states. This report highlights the results of the survey and presents a list of suggestions as to how these results might be applied to existing tourism strategies in the county.

Overview

One would find it challenging to describe New Jersey without mentioning the words "tourism" and "Jersey shore." New Jersey's tourism industry generated \$43.4 billion in 2015, and the state received 95 million visitors, up 2.4% from the previous year.¹ The tourism industry is also a major driver of employment across the state, providing jobs to 1 in 10 people in New Jersey.² These jobs span multiple sectors, including lodging, recreation, food and beverage, retail, real estate, and car rental. Tourism is ranked 5th in the state for employment, with the top five industries listed below:

1. Health care and social assistance
2. Retail trade
3. Professional, scientific, and technical services
4. Finance and insurance
5. Tourism

Tourism has been identified as important for Cumberland County in several regional and county-level strategic plans. Further, tourism has been recommended as an economic development strategy by the International Economic Development Council, who completed a [detailed technical assistance report for the Cumberland County Bayshore in 2015](#) with recommendations on strategic investments in the tourism industry and in infrastructure supporting the industry. Tourism has also been highlighted as an important economic development strategy by Cumberland Bayshore municipalities, as outlined in the [Cumberland County Delaware Bayshore Recovery Plan](#) (December 2013). Relevant data on the tourism industry at the county scale include the following:³

- Cumberland County tourism revenues totaled \$348 million in 2015, showing an 8.8% increase from the previous year's direct sales;
- \$38.9 million of Cumberland County's tourism spending each year comes from recreation;
- The tourism industry provided 3,290 jobs to the county in 2015;

¹ <http://www.state.nj.us/state/pdf/2015-nj-economic-impact.pdf>

² *Ibid.* Note that these 1 in 10 jobs in New Jersey include both direct and indirect employment.

³ <http://www.state.nj.us/state/pdf/2015-nj-economic-impact.pdf>

- Tourism in Cumberland County generated \$39.9 million in tax receipts at state and local levels in 2015;
- Tourism is ranked 5th among fastest growing sectors in the county.⁴

A [recent article](#) pointed to some factors leading to the significant increase in the tourism industry in Cumberland County in 2015:

“Factors that may have contributed to the growth of tourism included an expanded promotional campaign by the Southern Shore destination marketing organization”, said Diane Wieland, the organization’s chairperson... “Wheaton Arts Center, AJ Meerwald, NJ Motorsports and their ecotourism activities all fit well into emerging travel trends and are compelling reasons for people to visit for extended stays,” she said.

Little is known, however, about visitors to Cumberland County’s Bayshore communities, which includes the townships of Greenwich, Fairfield, Lawrence, Downe, Commercial and Maurice River. The Nature Conservancy compiled and distributed a survey in 2015 that targeted visitors to Bayshore communities, exploring some of the following questions:

- Why are visitors coming to the Bayshore and what are they doing?
- Are they satisfied with this visit and would they return?
- Do they purchase meals in restaurants located in the Bayshore?
- Do all Bayshore visitors come from nearby counties within an hour’s drive, or are they willing to drive further to visit the Bayshore?

The goal of collecting this data is to inform regional tourism strategies and projects.

How surveys were implemented

Surveys were implemented between May and October 2015. We acknowledge that this timing may mean that we missed a portion of the fishing and hunting seasons. We removed surveys completed by residents of the six Bayshore communities. Only surveys completed by individual visitors who live outside of those six municipalities were used, resulting in a total of 250 completed surveys. Of these responses, 53% were from the web-based Survey Monkey version distributed by email and 47% were in-person, intercept surveys conducted at five different sites:

- Bayshore Center at Bivalve
- Longreach Marina along the Maurice River in Port Norris
- Fortescue
- East Point Lighthouse
- Thompson’s Beach

Because of limited capacity and time for this project, we chose those five sites based upon recommended events that were taking place, increasing our likelihood of getting a higher number of

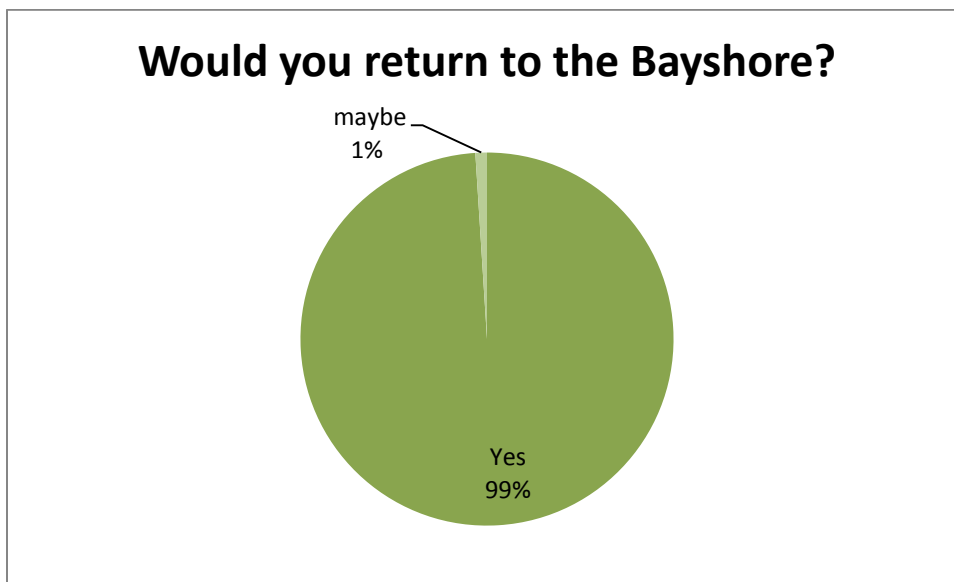
⁴ <http://www.sjedd.com/pdf/economy/Cumberland-County-profile.pdf>

responses. The surveys distributed by email were forwarded to the contact lists of several different nonprofit organizations working in the Bayshore region.⁵ The distribution of the surveys was non-randomized, so while responses don't tell us the exact percentage of the population that prefers one activity over another, the responses can give us insights into the general trends in popularity of activities and patterns of behavior among visitors.

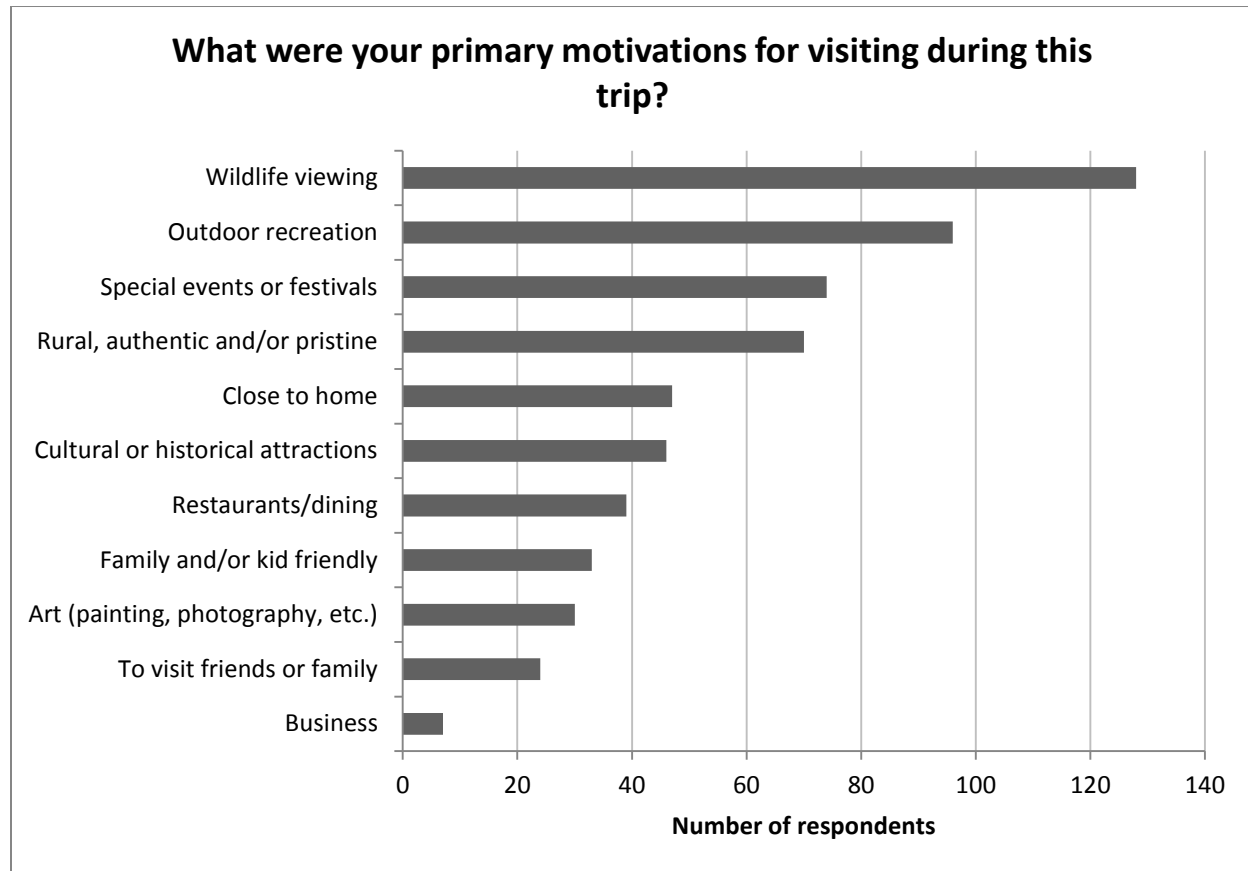
Results

Please note that all questions and responses were for sites within the six Cumberland County Delaware Bayshore municipalities. We asked the number of people in the travel party (including the respondent). Although there were 250 completed surveys, these surveys represent between **600 and 700 individuals** when including in those in the respondents' travel parties. In some cases, more than one member of the travel party completed a survey, so we cannot give an exact estimate of the total number of individuals represented by this study.

We then asked if visitors would return to the Bayshore.



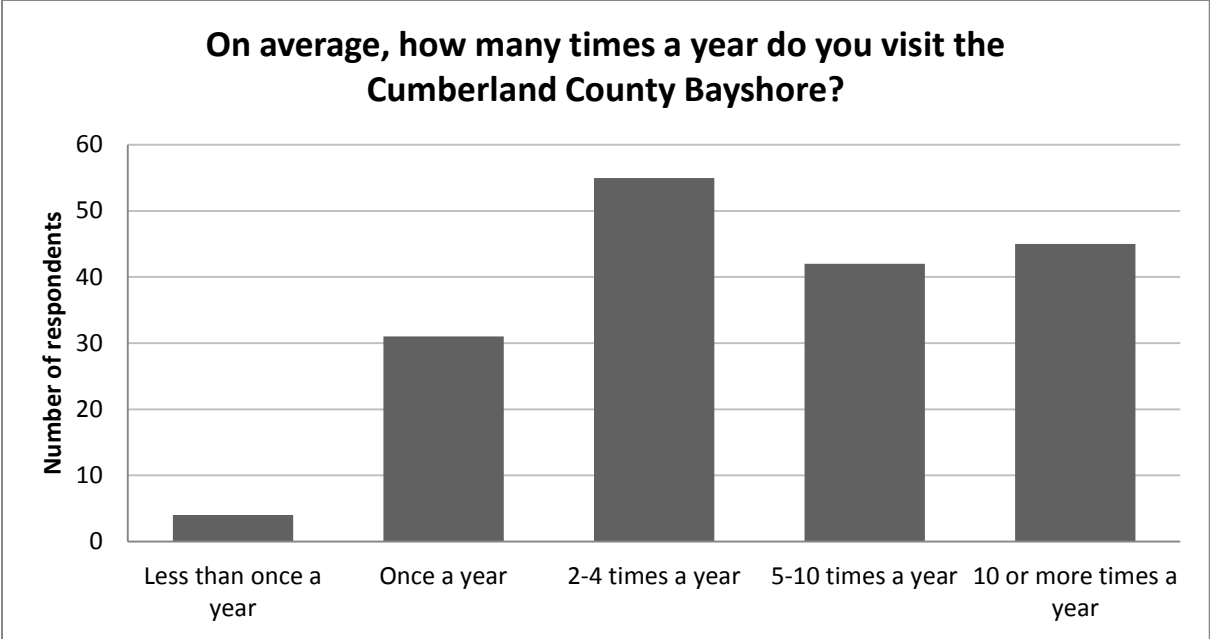
Next, we asked what the primary motivations for visiting were during this trip (respondents were encouraged to check all that apply).



Next, we ask respondents if they had purchased a meal at a Cumberland County Bayshore restaurant or food store on this trip. One concern was that respondents would mistakenly report yes, but that the restaurant where they purchased a meal was located outside of the six Bayshore communities. Thus, to avoid this potential issue, we listed all restaurants and food stores in Bayshore communities, as well as a blank for “Other.” The total number of meals purchased by survey respondents and others in their travel party, just during this current trip, was 469 meals (note that in some cases, we surveyed more than one member of the travel party and thus, this number of total meals may be an overestimate). For a further breakdown, refer to the following table:

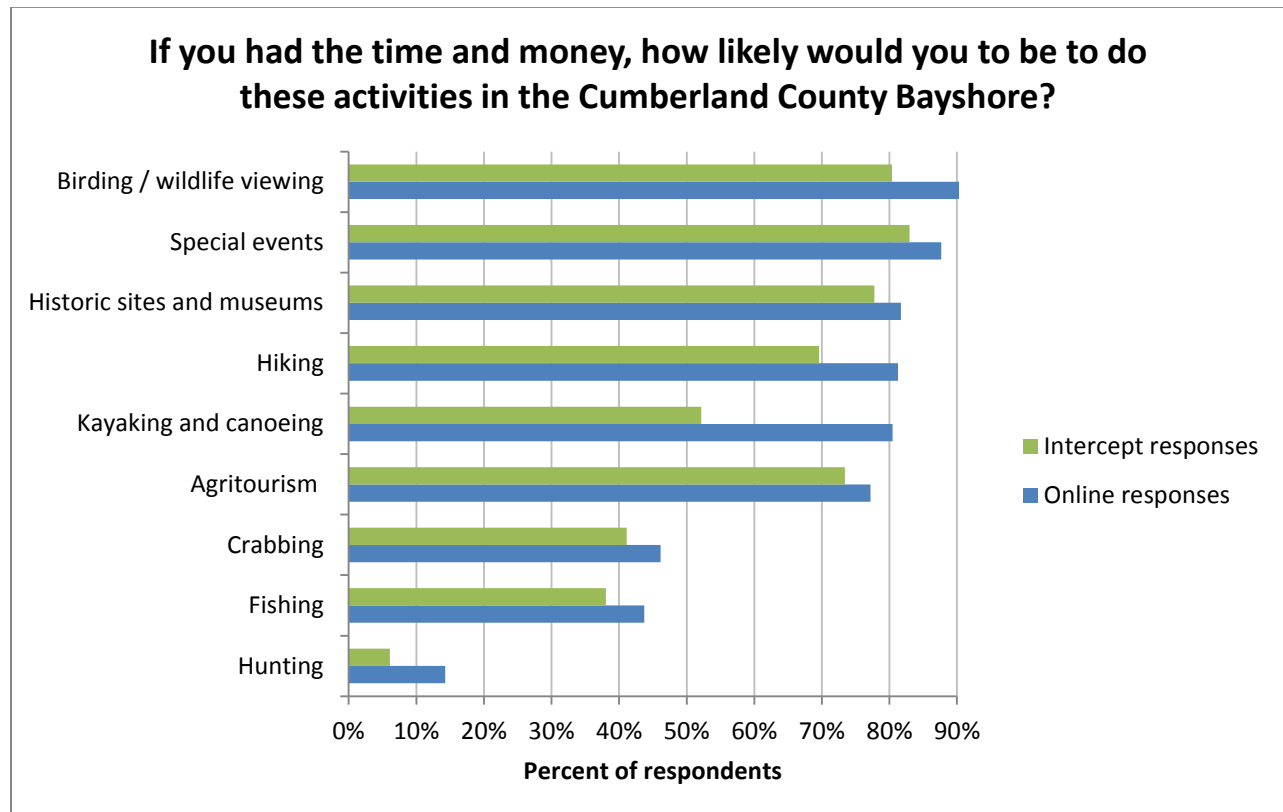
Percent of respondents to buy a meal in Bayshore community restaurants and food stores:		
52%		
Breakfast	Lunch	Dinner
16%	35%	49%

Then, we asked about the frequency of visits per year. It is noteworthy that approximately 50% of respondents visit the Cumberland County Bayshore more than five times a year.

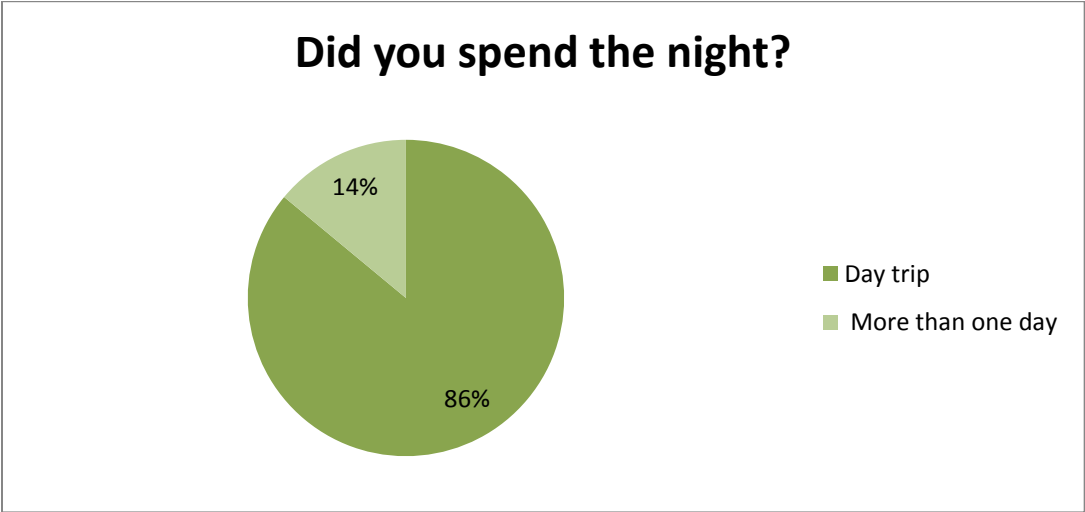


We also asked a question about future activities that would be of interest to visitors. We wanted to determine whether visitors were interested in a wider range of activities than those engaged in during this trip, but were simply unaware that those activities were available.

- We asked about nine potential activities and it is worth noting that all nine activities received a mix of responses, where at least some respondents selected each category: Extremely Unlikely, Unlikely, Neutral, Likely or Extremely Likely. In other words, no activities received only responses of “Extremely Unlikely” or “Unlikely.” That suggests that each of the nine activities may be of interest to at least one market segment. However, the adage in marketing is that *marketing to everyone is marketing to no one*. Thus, ranking the activities can give insights into which activities might be useful to consider when developing your marketing campaign.
- We compared the responses between those individuals who were surveyed by intercept surveys (in person surveys conducted at a given site) versus those who responded via the online survey (conducted using Survey Monkey). While there are small differences, there are no substantial differences between the two groups.
- The following figure includes responses where the likelihood selected was either “Extremely likely” or “Likely.” When looking at responses where the likelihood selected was “Extremely unlikely,” hunting had the most responses, followed by fishing, then crabbing. These results may be influenced by the fact that due to the sampling methods and timing of the survey, we may have missed a portion of the hunting and fishing seasons.



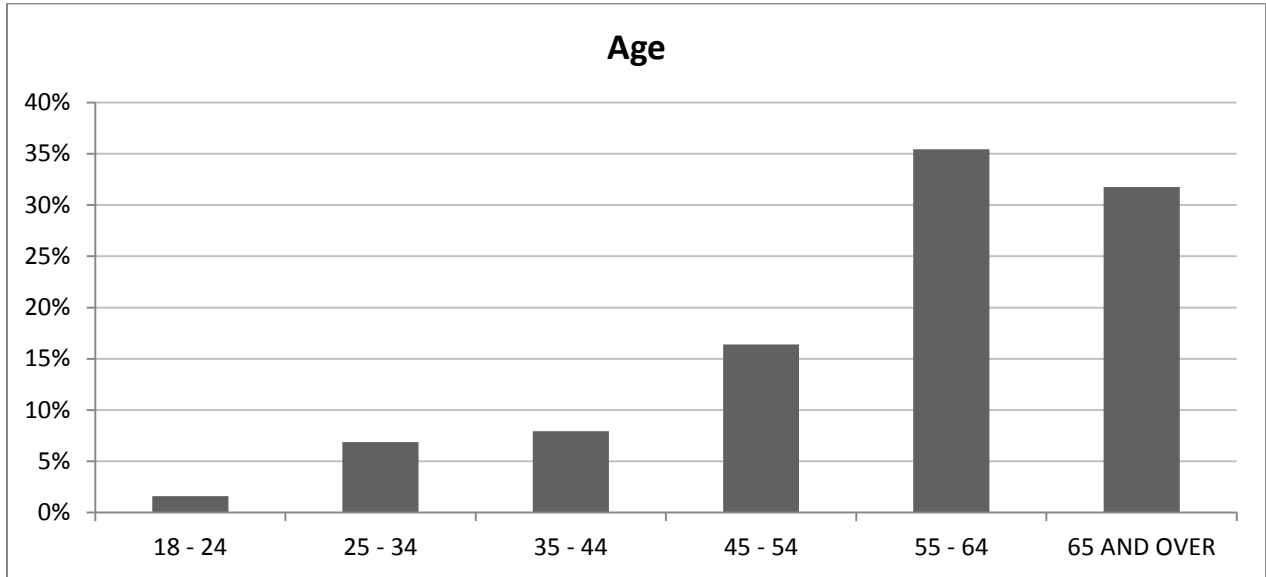
Next, we asked how many nights visitors had stayed on this current trip. Not surprisingly, the number was low, as there are very few lodging accommodations in the six Bayshore communities included in the survey.



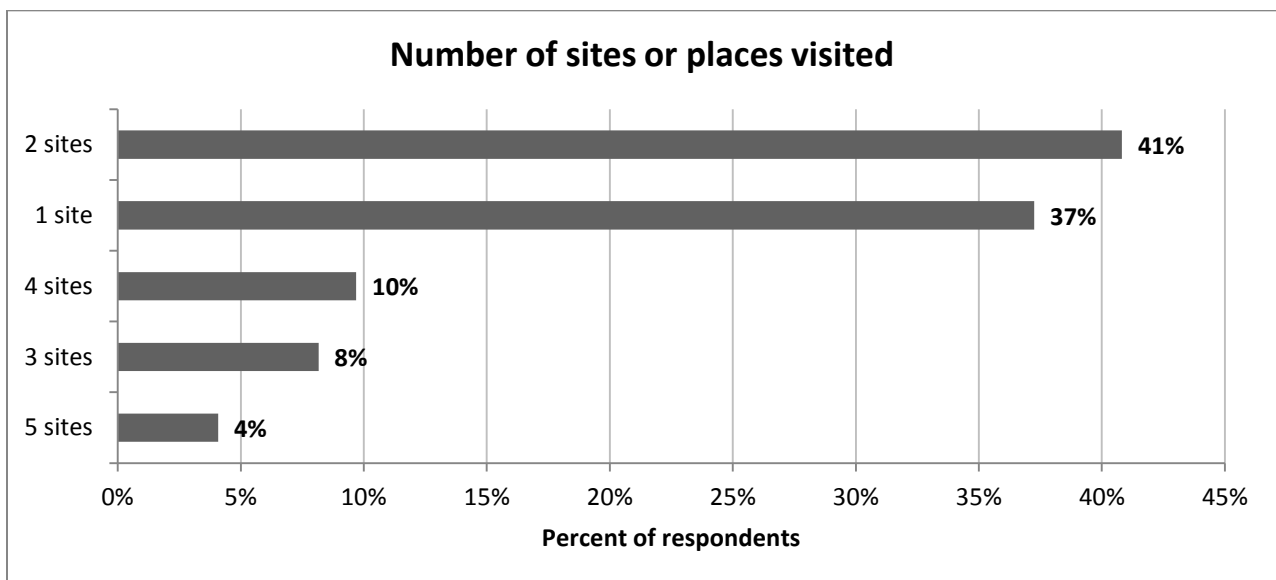
Then, we asked where the visitors came from. They traveled from a larger radius than expected, and a small number of responses didn't fit on this map (the three longest distances traveled were visitors from Florida, Minnesota and Virginia).



Respondents were also asked their age group. Two-thirds of respondents in this survey were over age 55. Note that we did not ask the age of all members of the travel party, so this may not be a fully accurate representation of the age distribution of all visitors surveyed (including members of travel parties).



The next set of survey questions went into more detail on specific areas. We asked respondents to list the sites or places they visited or planned to visit during this trip. We intentionally left the question broad so that respondents could answer a community (e.g. Greenwich), a site (e.g. East Point Lighthouse), or a category of sites (e.g. birding sites). Also, some respondents went on boat rides that visited many sites, yet we only counted boat rides as two sites (for the starting and ending points). Thus, it is challenging to directly compare the number of sites visited. That being said, we found that a majority of respondents who went to more than one site went to a mix of cultural and natural sites.



After asking respondents if they would return to the Bayshore (we reported earlier that 99% said yes, they would return), we then asked, “Do you have any suggestions to improve your visitor experience?” It is important to keep in mind when viewing the top responses that **only 20% of respondents answered this question**, meaning that 80% of respondents left this blank. The top categories of responses to improve visitor experience were, in order of importance:

- 1) More signage
- 2) Improvements to public restrooms/increase in number of public restrooms
- 3) More restaurant options
- 4) More information on what to do
- 5) Too much trash / junk in yards

The next set of questions were developed to gain insights into which aspects of the natural lands and water that define the Bayshore are most appealing to visitors, in order to develop language for marketing and communication. First, we asked an open-ended question, “What do you think are the most appealing natural attraction(s) or wildlife species that make this region worth visiting or attract visitors to the area?” Responses fell into five categories, in order of importance:

- 1) The natural landscape (marshes, beaches, rivers, and the Delaware Bay)
- 2) Wildlife (birds, fish/oysters, etc.)
- 3) Both the natural landscape and wildlife
- 4) People and culture
- 5) Water (the Delaware Bay or rivers)

Samples responses included the following:

“Open beautiful views, seeing and smelling the bay, the Bald Eagle probably stands out as a first easy to see species for new visitors. Being able to be in a beach situation then on forest trails within minutes.”

“The solitude of the marshes, the stark beauty, eagles and other raptors, unspoiled landscapes, historic oyster and sturgeon industries.”

“Varied wildlife. Every time we visit we see different things, animals.”

What was notable from the responses was that visitors did not respond with a **single** “most appealing natural attraction or wildlife species” but instead, commented on the diverse landscape, diverse species, and often on the intertwined aspects of both the natural and cultural landscape.

We also wanted to understand if there was a top species that could be used for marketing purposes to attract new visitors to the area. The question focused on three animals – bald eagles, red knots, and horseshoe crabs, and asked, “How would you rank each of these animals’ appeal to visitors? Use the following scale to rank for each animal this statement: I would travel out of my way to see this animal in NJ’s Delaware Bayshore.” The bald eagle ranked highest.

I would travel out of my way to see this animal in NJ's Delaware Bayshore



Recommendations

The results from this study can be applied to regional policies and tourism strategies in many different ways, depending upon organizational goals and strategies and resources available. Much work has already been completed in the Cumberland County Bayshore towards developing tourism and economic development strategies, through the County's economic development plans, the *Cumberland County Delaware Bayshore Recovery Plan* of December 2013, and the economic development strategic planning process led by NJ's Department of Community Affairs (which incorporated projects from existing county plans and the 2015 technical assistance report on tourism developed by the International Economic Development Council). The Discover Delaware Bay campaign is a multimedia branding initiative which began in 2010 and includes an informational [website](#) on tourism activities and events in the region, as well as related marketing and advertising strategies. The Discover Delaware Bay campaign and website are resources providing direct benefits to local businesses and serve as a hook to entice visitors and locals to engage in the phenomenal natural, cultural, historic, agricultural and seafood resources of New Jersey's Bayshore region.



Photo: Birders along NJ's Delaware Bayshore, © Haley Jordan

Thus, we are not recommending that these survey results lead to a change in existing strategic plans. Rather, the results may be useful in informing the development of projects within those existing plans and strategies. Tourism strategies in the Cumberland County Delaware Bayshore will be most successful when there is *coordination* among the multiple groups implementing tourism strategies, *communication* around implementation of strategies to capitalize on the synergistic effects, and *prioritization* of the top strategies that are most likely to set the stage for a successful tourism industry. A Tourism and Economic Development (TED) Committee was formed from the *Cumberland County Delaware Bayshore Recovery Plan* in 2013 and consists of approximately two dozen members representing four municipalities, the county and several nonprofit organizations. The TED serves as an information clearinghouse for sharing information on tourism projects and strategies, with goals of increasing the number of visitors to the Bayshore and increasing visitor spending in local businesses, while maintaining the cultural and natural integrity of Bayshore communities.

Examples of ways that the results could inform ongoing tourism strategies and projects in the Cumberland County Bayshore region include:

- **Focus on birders as a target audience for marketing in the short-term.** The results suggest that birding and wildlife viewing is a top activity that *already brings visitors* to the area. Cape May County attracts 12.5 million visitors each year, and 43% come for ecotourism.⁶ A 2014 report also showed that 10% of visitors list birding as a “most important factor in choosing Cape May

⁶ <http://capemaycountynj.gov/DocumentCenter/Home/View/1868>

County as your vacation destination.”⁷ Given Cape May’s proximity to Cumberland County and the similarity in birds found in both locations, there may be opportunities to market to Cape May County visitors to add a day trip to go birding in Cumberland County, where sites may be less crowded.

- **Promote the region’s high number of bald eagles to attract more visitors to the area.** Visitors surveyed show a willingness to travel out of their way to see a bald eagle. This is already seen as a successful strategy based on February’s Eagle Fest, and with eagles present much of the year, there may be additional opportunities to promote eagles and increase visitation.



Photo: Bald eagle, © Tom Conte

- **Further investment in businesses and tourism infrastructure to grow the tourism industry in Bayshore communities is worthwhile.** Fifty percent of respondents purchased a meal in local Bayshore restaurants. Further, the strength of visitor satisfaction indicated by the surveys is impressive, with 99% stating that they would return to the Bayshore and more than half of respondents visiting over five times a year. These indicators suggest that the tourism industry in Bayshore communities has the potential to grow.
- **Promote opportunities to combine culture and nature.** The results also show that respondents were almost equally interested in birding & wildlife viewing as in visiting historic sites and museums. Special events, agritourism and hiking also ranked highly as activities of interest. Promoting opportunities to combine these desirable activities can be a promising approach to entice new visitors to the area.
- **Encourage current and future visitors to attend more events and festivals.** Many visitors in the survey noted having attended a festival or event in the Bayshore. Promoting festivals and events can be another approach likely to lead to a positive return on investment. Specifically ensuring that there are major events on most weekends during the peak season can encourage visitation throughout the year, while also incentivizing visitors to spend money at local vendors present at these festivals.
- **Increase the visibility and traffic towards existing tourism-oriented websites for the region.** Many visitors noted an interest in more advertising and more information on events and activities in the Bayshore. The Discover Delaware Bay campaign, which includes the website <http://www.discoverdelawarebay.org/>, has the potential to lead to more visitors to the area, give visitors more information on activities and events in the area, and direct visitors to more local businesses to increase their economic impact on the region. Heavier promotion of the website by a wider range of partners is a low-cost way of increasing visitation to the website.

⁷ <http://capemaycountynj.gov/DocumentCenter/View/77>

- **Leverage the strengths of Cumberland County’s urban hubs in addition to the resources and assets present along the Delaware Bayshore.** Only 14% of respondents spent the night in Bayshore communities. This suggests opportunities for collaboration with the county’s urban hubs, Millville, Vineland and Bridgeton, to advertise to visitors to spend the night in hotels in the urbanized areas while visiting Bayshore sites. This is a mutually beneficial tactic where visitors who are interested in the rich natural and cultural resources offered by the rural Delaware Bayshore may also stimulate economic development in urban areas through spending at hotels and other businesses.
- **Improve public access, amenities, and signage at key sites of interest and signage at key intersections of importance.** Not surprising, signage was listed as an area for improvement. Cumberland County and Bayshore municipalities are actively working to install signage including wayfinding and points of interest. However, combining this with Discover Delaware Bay branding may have the added benefit of directing people to the website, where they will be able to find more information about activities, events, and businesses throughout the entire Bayshore. Also, since one issue listed was restrooms, encouraging and advertising the use of municipal buildings by visitors could be one approach to help alleviate this concern, while also providing an opportunity to share information on events and other activities.

Survey questions

These questions are from the online version of the survey. The paper copy of the survey had the same questions but with minor changes in wording.

This survey is for people who have visited the Cumberland County Bayshore between January 2014 and the current date. In order to better understand and serve those who visit our community, The Nature Conservancy and the Bayshore Center at Bivalve would like to request your participation in this survey. Participation is voluntary and your responses will be anonymous.

All questions in this survey pertain to travel to the coastal communities in the Cumberland County Bayshore region, which includes the townships of Greenwich, Fairfield, Lawrence, Downe, Commercial and Maurice River (and does not apply to the urban centers of Bridgeton, Millville and Vineland).

Thank you for your participation!

- 1) Have you been to the Cumberland County Bayshore between January 2014 and the current date?
- 2) If you have taken more than one trip, think about a **single trip** during that time period that was an enjoyable or memorable trip.
 - What date was that trip? (month and year only)_____
- 3) Thinking again to that single trip you have selected, how many nights did you stay (mark 0 nights for day trips)?
 - _____NIGHTS
- 4) Thinking again to that single trip you have selected, number of people in your travel party, including yourself:_____
- 5) Thinking again to that single trip you have selected, list the sites or places that you visited during that trip.
 - Site 1: _____
 - Site 2: _____
 - Site 3: _____
 - Site 4: _____
 - Site 5: _____
- 6) Please list the specific activities that you participated in during that single trip you have selected (e.g. fishing, birding, visiting a particular museum, etc.). _____

7) What were your primary motivations for visiting during this trip? (Check all that apply)

Business	Wildlife viewing	Cultural or historical attractions & activities
To visit friends or family	Family and/or kid friendly	Restaurants/dining
Close to home	Rural, authentic and/or pristine	Special events or festivals
Outdoor recreation	Art (painting, photography, etc.)	<i>Other:</i>

8) How many times have you purchased or will purchase a meal at a Cumberland County Bayshore restaurant or food store on this trip?

Breakfasts _____ Lunches _____ Dinners _____

9) From which Cumberland County Bayshore places did you purchase your meals? (Check all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Maurice River Diner | <input type="checkbox"/> Wawa |
| <input type="checkbox"/> Dino's Pizzeria and Steak House (Port Norris) | <input type="checkbox"/> Dino's Pizzeria and Restaurant (Cedarville) |
| <input type="checkbox"/> The Landing | <input type="checkbox"/> Aunt Betty's restaurant |
| <input type="checkbox"/> Charlesworth | <input type="checkbox"/> George's Pizzeria |
| <input type="checkbox"/> Bull on the Barn | <input type="checkbox"/> Papa Luigi's Pizzeria |
| <input type="checkbox"/> Oyster Cracker Café at Bayshore Center at Bivalve | <input type="checkbox"/> Barnett's Convenient Store and Gas |
| <input type="checkbox"/> Higbee's | <input type="checkbox"/> Bait Box |
| <input type="checkbox"/> Other: | |

10) On average, how many times a year do you visit the Cumberland County Bayshore, as defined in the opening statement? (select one)

- | | |
|---|--|
| <input type="checkbox"/> First trip to the Bayshore | <input type="checkbox"/> 5-10 times a year |
| <input type="checkbox"/> Once a year | <input type="checkbox"/> 10 or more times a year |
| <input type="checkbox"/> 2-4 times a year | |

11) Would you return to the Bayshore again for another trip? **Yes no**

If yes - do you have any suggestions to improve your experience? **If not, why** - what are your biggest barriers for returning?




12) If you had the time and money, how likely would you be to do these activities in the Cumberland County Bayshore? Please circle one number to represent your likelihood for each activity.

Activity	Likelihood				
	Extremely unlikely	Unlikely	Neutral	Likely	Extremely likely
Fishing	1	2	3	4	5
Hunting	1	2	3	4	5
Kayaking and canoeing	1	2	3	4	5
Birding / wildlife viewing	1	2	3	4	5
Crabbing	1	2	3	4	5
Hiking	1	2	3	4	5
Historic sites, buildings and/or museums	1	2	3	4	5
Agritourism (farms stands, wineries, etc.)	1	2	3	4	5
Special events	1	2	3	4	5

13) Thinking about the Cumberland County Delaware Bayshore region as defined in the introduction, what do you think are the most appealing **natural attraction(s)** or **wildlife species** that makes this region worth visiting or attracts visitors to the area?

14) This question includes three animals found in New Jersey’s Delaware Bayshore (scroll down to see imagines; images not to scale). How would you rank each of these animals’ appeal to visitors? Use the following scale to rank for **each** animal this statement: **I would travel out of my way to see this animal in NJ’s Delaware Bayshore:**

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
1	2	3	4	5

Bald Eagle	Red knot	Horseshoe crabs
		
Appeal (select a ranking): 1 2 3 4 5	Appeal (select a ranking): 1 2 3 4 5	Appeal (select a ranking): 1 2 3 4 5

15) For your primary residence, postal code (Zip): _____

16) What is your age group?

18 - 24

25 - 34

35 - 44

45 - 54

55 - 64

65 AND OVER