



**FINAL Project Report**  
**Master Plan for the Creative Community Collaborative**

Prepared for  
**North Jersey Partners**  
**New Jersey**

Submitted by  
**Economics Research Associates, an AECOM company (ERA)**  
In association with Hutton Associates Inc.  
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## I. Executive Summary

Economics Research Associates and Hutton Associates (the ERA Team) were retained by the North Jersey Partners to prepare the master plan for the Creative Community Collaborative. Creative Community Collaborative is a market research project to assess strategies to further leverage regional entertainment, arts, retail and tourism assets in an eight-county region in northern New Jersey.

The project is funded by the federal Workforce Innovation in Regional Economic Development (WIRED) grant program. WIRED is a grant provided by the U.S. Department of Labor, Employment and Training Administration to governors representing 39 regions in the United States to pursue a more collaborative approach to workforce development initiatives across regional boundaries. Central to this regional approach is developing collaborative partnerships with economic and development, industry and education. The New Jersey Department of Labor contracted with the Newark Alliance, a non-profit organization, to lead the North Jersey Partners' WIRED initiative.

The goals of the master plan include economic development, job growth and regional promotion of local destinations. This plan considers entertainment, arts and retail as tourism destinations, and seeks to strengthen tourism demand by bringing new tourists to Northern New Jersey, extending the length of stay of existing tourists and encouraging residents of Northern New Jersey to act as tourists in their own state more frequently. Growth in tourism within northern New Jersey will create new jobs within the EAR sector and support sectors and will have a significant economic impact on the state, regional and local levels.<sup>1</sup>

### Defining the Region

The eight-county region of northern New Jersey is comprised of Bergen, Essex, Hudson, Morris, Passaic, Sussex, Union and Warren counties. The region is spread over 2,107 square miles and in 2008 was home to a population 4.15 million people. Figure 1 illustrates the geography of the eight-county region.

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<sup>1</sup> This report is based on data and information that was current as of September 2009.

**Figure 1: Northern New Jersey Eight-County Region**



## **Tourism Plays an Essential Role in the New Jersey Economy**

Tourism is a substantial source of revenue and employment for the State of New Jersey, and the scale of tourism in the state is projected to grow. Tourism generates many entry-level jobs and helps to create a more diversified workforce. New Jersey and the northern New Jersey region have the two most important components required to grow tourism: a variety of quality attractions and access to a large pool of potential visitors that live within a one-day drive.

Tourism has not achieved its full potential in New Jersey. Visitors come for the day and trips are typically singular in destination. Tourism promotion is underfunded in New Jersey and the state is not perceived as a tourism destination. The challenge for this master plan is to increase internal tourism, bring more tourists to the state, encourage tourists who already visit to stay longer and capture tourists who might otherwise skip New Jersey in favor of visiting New York City or Philadelphia.

With greater funding, the tourism identity of the state can be developed through branding, better promotion and packaging. The following section provides several compelling reasons for the state to dedicate a larger share of funds to the tourism industry.

***The tourism industry is one of the largest engines in New Jersey's state economy***

The travel and tourism industry brought in \$38 billion<sup>2</sup> in tourism expenditures to New Jersey in 2007. The eight-county region generated \$7.3 billion in tourism expenditure, or 20 percent of total tourism expenditure in New Jersey. If the tourism industry was a federally-classified industry sector, then it would be the third largest private sector employer in the state, after health care/social assistance and retail trade. Tourism is a highly local industry, and spending for tourism remains largely within the state. Of the \$38 billion in tourism expenditures, \$27 billion stayed within New Jersey.

***Employment in tourism creates new jobs in non-tourism sectors as well***

In 2007, the tourism industry supported 466,000 full-time equivalency jobs, 384,000 of which were directly linked to the core tourism industry.<sup>3</sup> Growth in tourism employment has multiplier effects that extend beyond the tourism sector. For every new Tourism Product job (e.g. jobs at sites where tourists go, such as museums, malls, wineries, galleries), an average of 0.7 additional indirect/induced jobs are added to the local economy. For every new Tourism Service job (e.g. jobs in the tourism service sector, hotels, tour operators, transportation, restaurants), an average of 0.6 additional indirect/induced jobs are added to the local economy.

***Increased State Tourism Spending Yields Job Growth and increased Tourism Spending***

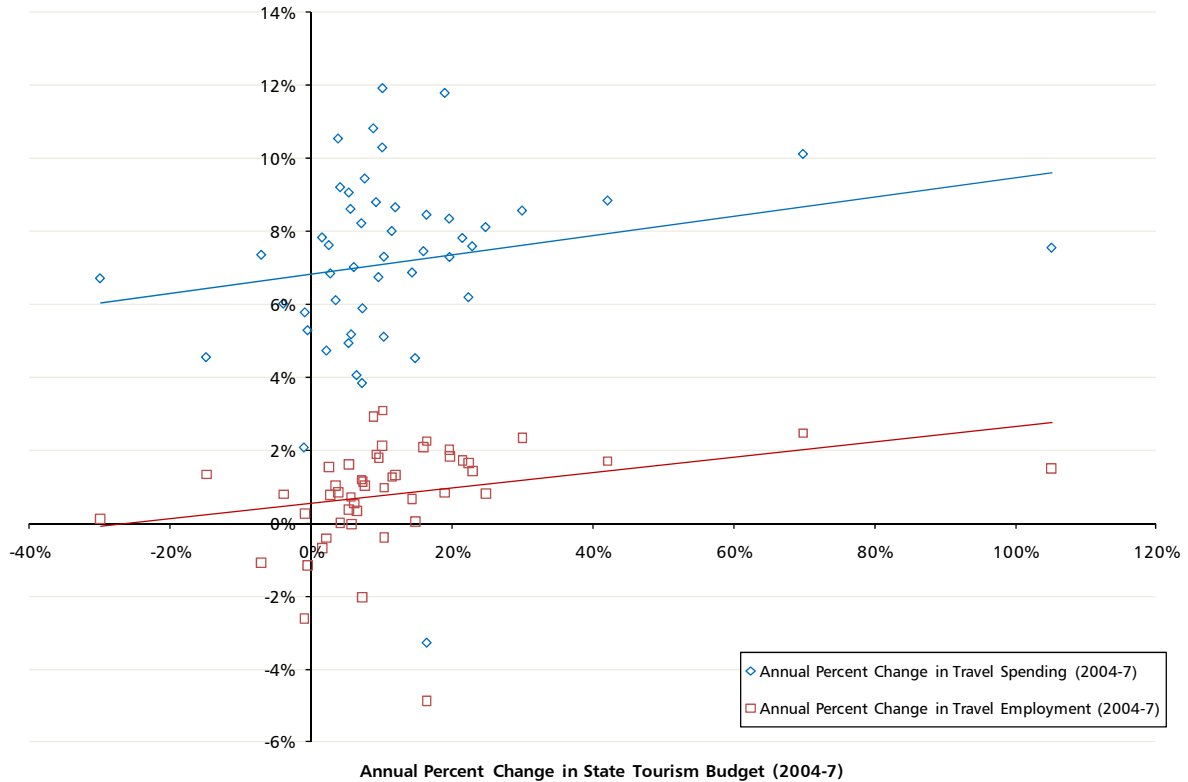
Growth in tourism budgets are correlated with growth in tourism jobs and growth in tourism spending. ERA evaluated trends in state tourism spending, state travel employment, and tourism spending in the United States over the most recent three-year cycle – from 2004 to 2007. The relationship between annual percent change in state tourism budget, travel spending, and travel employment is plotted in Figure 2. Each point on the graph represents a state, and each state is represented twice (once for travel spending and once for travel employment). As indicated by the trend lines in Figure 2, the larger the percentage increase in state tourism budgets, the greater the percentage increase in both travel employment and travel spending. Based on the slopes of the trend lines, for every 1 percent increase in state tourism budget, there is a corresponding 0.6 percent increase in travel spending and 0.07 percent increase in travel employment.

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<sup>2</sup> NJ Tourism: An Economic Juggernaut, Global Insight, 2008.

<sup>3</sup> Core tourism spending represents expenditures at businesses that directly provide goods and services to the visitor, such as restaurants and hotels.

**Figure 2: Every 1% increase in state tourism budget yields a corresponding 0.6% increase in travel spending and 0.07% increase in travel employment**



Source: US Travel Association

The benefits of tourism to New Jersey’s economy are manifold and proven. The tourism industry is one of the leading economic engines in New Jersey, providing \$38 billion in tourist expenditures and over 466,000 jobs in 2007. Moreover, national trends demonstrate that there is a positive correlation between increasing spending on tourism and increasing tourism jobs and spending within the state.

### Key Challenges

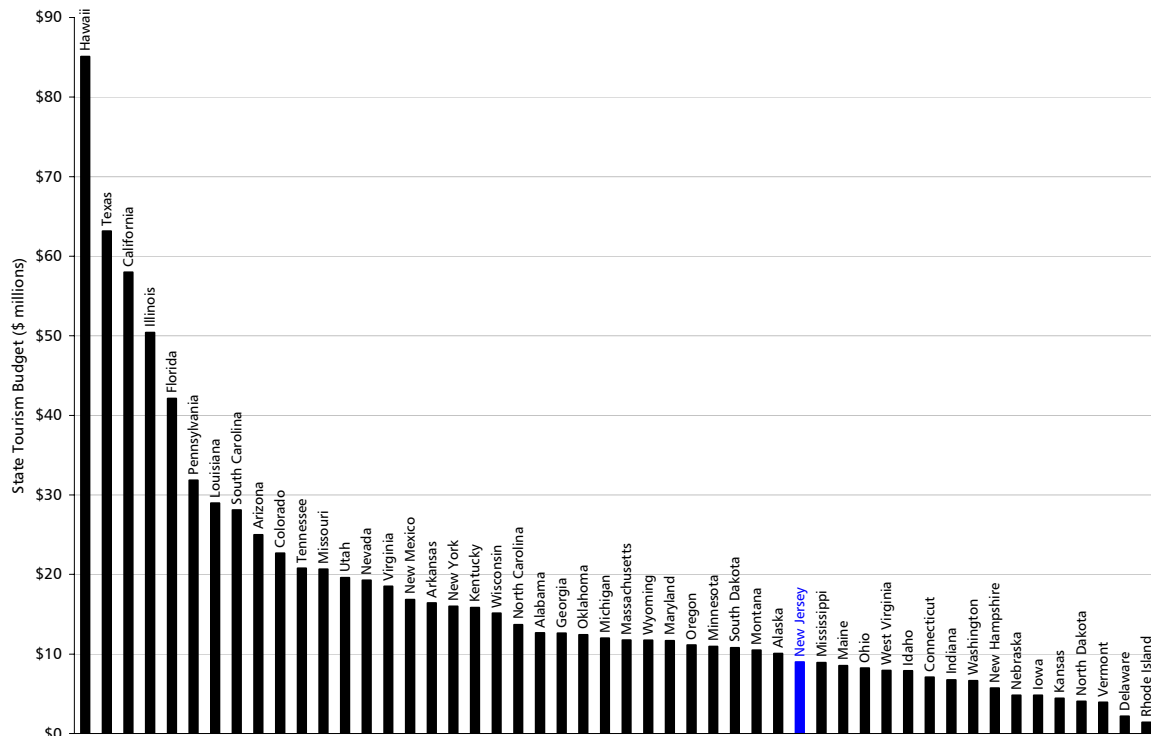
In spite of the proven importance of the tourism industry, New Jersey faces several key challenges that prevent tourism products from developing strategically in the state.

#### ***Low level of tourism funding puts New Jersey at a competitive disadvantage for tourism promotion and retention***

While tourism is one of the largest industry sectors in the New Jersey economy, the state has not invested sufficiently in tourism promotion and development. Moreover, the states with which New Jersey competes most intensely for tourists, New York and Pennsylvania, dedicate more funds to

tourism promotion. The State of New Jersey allocated \$9 million to the State Division of Travel and Tourism in 2008. New Jersey's \$9 million state tourism budget was the 16th smallest state tourism budget in the country. In the same year, the average state tourism office budget allocation in the United States was \$17.4 million.

**Figure 3: 2007-2008 State Tourism Office Budget**



Source: Travel Industry Association, ERA | AECOM

***There is no stable funding source for tourism promotion in New Jersey***

There is no stable funding source for tourism in New Jersey. Revenues from the state occupancy fee fund the State Division of Travel and Tourism, however the state travel budget varies annually and only a small share of occupancy fee revenues directly fund tourism. In 2008, the state occupancy fee generated \$90 million in revenue, of which \$9 million was allocated to the State Division of Travel and Tourism. The majority of the revenues from the occupancy fee (60 percent) were distributed into the state general fund. State and municipal occupancy fees are levied on all hotel and bed and breakfast room rentals in the state.

The annual budget allocation to the State Division of Travel and Tourism varies based on the annual revenues from the occupancy fee and the discretion of the State Legislature. The Division's allocation has decreased every year since 2004. Destination Marketing Organizations (DMOs)

throughout the state rely heavily on funding provided by the State Division of Travel and Tourism, and the unpredictability of state funding threatens all long term tourism development ventures on the state, regional and local levels.

***Northern New Jersey lacks a tourism identity***

The northern New Jersey region does not have a cohesive or identifiable tourism identity and has never been marketed or branded as a region. Situated between the two states, New Jersey is frequently seen by visitors as a pass-through state for people on their travels between Philadelphia and New York City. The lack of a tourism identity can also be attributed both to the diversity within the region and to the long-standing media-driven and largely inaccurate perception of the region as polluted or corrupt. Additionally, the Jersey Shore and Atlantic City are more conventionally associated with tourism and recreation within New Jersey. Creating a tourism identity for northern New Jersey, and bringing awareness to the region as a viable tourism destination, is a key challenge of this project.

***Northern New Jersey does not offer enough packaged travel products for potential tourists***

Tourism destinations in northern New Jersey are promoted individually, rather than grouping events and services together into packaged tourism products structured to appeal to target markets. Some target markets that should be considered for packaged tourism promotion include convention-goers and travelers flying into Newark Liberty Airport. In addition to packaging existing tourism destinations, more product development is required in order to ensure that there are quality tourism opportunities.

***The majority of arts and leisure trips to Northern New Jersey are day trips***

A survey conducted of residents living within 50 miles of the eight-county area indicates that arts and leisure visits to northern New Jersey typically do not include an overnight stay. Only 16 percent of the sample population stayed overnight in the past year. Longer stays will promote economic development by enhancing multiple tourism service providers, not just a single destination. By creating opportunities for visitors to stay longer, northern New Jersey hotels, restaurants, retailers, and other tourism destinations will all benefit.

## **Action Plan**

The Creative Community Collaborative Master Plan includes an Action Plan that identifies the principal activities that could be undertaken to expand tourism and create jobs within the EAR sector within the northern New Jersey region. ERA has structured its Action Plan to follow the conceptual framework of the WIRED initiative, creating a strategy that has quantifiable and measurable goals. The action plan addresses state, regional and local actions that can expand the EAR sector. The

plan prioritizes strategies; defines short, medium and long term actions; and identifies agents responsible for implementation. The action plan is based on prior studies of New Jersey tourism and economic development, feedback from the advisory and stakeholder committees, case studies and the experience and expertise of the consulting team.

The following recommendations, excerpted from the Action Plan, represent the highest priority recommendations.

***Create a dedicated source of funding for New Jersey DMOs***

This master plan recommends that the state of New Jersey create a dedicated source of funding for the state's DMO. There are several approaches by which this dedicated funding could be achieved. One approach would be a reallocation of an existing funding stream such as the current state occupancy tax. However, reallocation of occupancy tax dollars would need to preserve funding for the arts and historical commission, both of which are important components of the state's tourism offering, in order to maximize the economic and fiscal impacts that will come with plan implementation. Another approach would be for the state to create a new funding stream such as through the authorization for counties to levy a separate county hotel fee earmarked for DMO's within the county. Other public – private partnership mechanisms could also be considered. Regardless of funding source, the goal of this recommendation is to provide a dedicated annual funding stream to the DMO's without harming other elements of the tourism industry.

Based on the master planning process, the plan proposes securing DMO funding through a hotel occupancy fee because this taxing mechanism is levied on tourists (hotel guests) in order to fund tourist-oriented initiatives. An annual county occupancy fee of 1 percent could net approximately \$15 million in additional revenues to DMOs throughout the state and \$7 million to DMOs in the Northern New Jersey region. Revenues from the county occupancy fee should be used to fund the following uses:

- County receives share required for administrative purposes
- Regional Tourism Alliance receives share required for operating expenses (estimated at \$250,000 annually)
- Remainder allocated to DMO(s) in the county

The enabling legislation for the county occupancy fee should stipulate that in order to levy a county occupancy fee, the following two conditions must be met:

- At least 90 percent of all revenues collected must fund Destination Marketing Organization(s) within the county
- Destination Marketing Organizations should be clearly defined to include the following criteria:
  - A DMO is a 501(c)(6) corporation
  - DMO governance includes ex officio participation from the county and major cities, and broader participation from the tourism sector, including representatives from hotels

A county occupancy of 1 percent would make the total room charge with tax in Northern New Jersey slightly higher than Philadelphia but still lower than New York City. All else remaining equal, if a 1 percent county occupancy tax is levied in New Jersey, then for a hotel room with a rate of \$100 hotel per night, a guest would pay \$115.20 in Philadelphia, \$116 in Northern New Jersey, and \$116.75 in New York City.

Figure 4 details potential revenues and total charges associated with levying a county occupancy tax for funding DMO's in New Jersey based on the example of Northern New Jersey.

**Figure 4: Feasibility Test for County Occupancy Fee in New Jersey**

Northern New Jersey	Status Quo (State and Municipal Occupancy Fees)	Status Quo plus County Occupancy Fee
<b>Hotel Occupancy Fee</b>		
State Occupancy Fee	5%	5%
County Occupancy Fee	0%	1%
<u>Municipal Occupancy Fee</u>	<u>3%</u>	<u>3%</u>
<b>Total Hotel Occupancy Fee</b>	<b>8%</b>	<b>9.0%</b>
<b>Revenues</b>		
State Occupancy Fee Revenues	\$35,136,180	\$35,136,180
County Occupancy Fee Revenues	\$0	\$7,015,000
<u>Municipal Occupancy Fee Revenues</u>	<u>\$21,009,874</u>	<u>\$21,009,874</u>
<b>Total Hotel Occupancy Fee Revenues</b>	<b>\$56,146,054</b>	<b>\$63,161,054</b>
<b>Example Room Charge -- Northern New Jersey</b>		
Room Rate	\$100	\$100
Max Sales Tax	\$7.00	\$7.00
<u>Hotel Fee</u>	<u>\$8.00</u>	<u>\$9.00</u>
<b>Total Room Charge</b>	<b>\$115.00</b>	<b>\$116.00</b>

Source: New Jersey Department of Treasury

***Create the North Jersey Tourism Alliance to unify tourism promotion in the region and provide services in a more cost effective manner***

A regional tourism organization is vital to establishing a tourism identity for the northern New Jersey region. This regional organization, the 'North Jersey Tourism Alliance', would serve as an umbrella organization, not a separate DMO. The regional organization could communicate entertainment, arts and retail activities regionally, and schedule and facilitate meetings between DMOs in the region. The regional organization provides scale that is necessary to undertake tourism development activities and support tourism promotion in eight counties of Northern New Jersey as a tourism destination. Roles and responsibilities of the new regional tourism organization could include the following:

- Create branding and positioning strategies for the two tourism zones within the northern New Jersey region
- Coordinate marketing strategies for each tourism zones in the region
- Work with tour operators to create tourism packages that serve the Northern New Jersey region
- Maintain websites for the northern New Jersey tourism region
- Coordinate technical assistance consortium
- Coordinate internship program
- Oversee regional research
- Represent region at conventions and trade shows
- Coordinate familiarization tours for regional and national travel writers and tours for regional hospitality industry workers to familiarize them with local offerings
- Hospitality training
- Coordinate regional, secret shoppers
- Coordinate travel writers
- Inventory and publish current resources
- Maintain and disseminate regional special events calendar

In order to function, the regional tourism organization will need a dedicated staff person who ensures ongoing coordination between the tourism entities in the region. This should not be a volunteer-led initiative. The regional tourism organization should be staffed by an experienced tourism development specialist.

ERA estimates that a regional tourism organization would require \$150,000 to start-up, and another \$250,000 for annual operating expenses. The new regional tourism organization could be funded through occupancy tax revenues.

### ***Establish the North Jersey regional brand***

The Creative Community Master Plan endorses creating a unified North Jersey tourism region that encompasses the eight counties considered as part of this master plan and possibly other counties in northern New Jersey. There are several compelling reasons for creating a unified tourism district for the entire northern New Jersey region:

- Northern New Jersey represents a natural geographic zone that pulls together the northern area of the state
- Northern New Jersey offer a diverse product offering that provides synergic opportunities for packaging and promotion

- The counties of northern New Jersey have a strong orientation toward the New York City market
- The eight counties in northern New Jersey that have participated in the WIRED project over the last 18 months have established a strong working relationship that will be formalized under the plan
- The North Jersey counties are prepared to move forward immediately in the implementation of the plan

### ***Strengthen local tourism product offerings***

Although there is an abundance of tourism destinations in northern New Jersey, key tourist sites are not packaged as ready-made vacations. Today, tourists who come to northern New Jersey must be proactive and resourceful by piecing together information from various sources to create a self-manufactured vacation.

The North Jersey Tourism Alliance should work with New Jersey-based and national tour operators to organize themed tourism packages. Tourism packages should appeal to a variety of target markets, including families, seniors and school groups. Packages should also include complementary attractions, services such as hotel and restaurant discounts and transportation opportunities.

It is critical that only group-ready sites are included in the packaged product offerings. Tour packages should not be used to generate attendance for sites that do not have the capacity to accommodate the associated growth in visitors. Poor visitor experience damages the reputation of the site and of the tourism industry in northern New Jersey as a whole. Reversing a damaged reputation is a lengthy and costly process, and one which can be avoided by only including quality tourism products in the tour packages that are created.

### **Economic Impacts**

The Master Plan for the Creative Community Collaborative proposes a variety of action items that will, among other things, increase the public resources available for tourism promotion in the state. For example, the proposed new county occupancy fee will bring \$15.1 million in new tourism funding to New Jersey. When added to the current State Division of Travel and Tourism funding of \$9 million and an estimated \$3.6 million in DMO funding (excluding state DMO grants), the total level of public funding for tourism will increase from \$12.6 million to \$27.7 million, which represents an increase of 120 percent. This growth in tourism funding, achieved through the full implementation of the Creative Community Collaborative Master Plan, could add an estimated 16,000 to 24,100 new travel jobs in the New Jersey, with a midpoint estimate of 20,100 jobs. Increased expenditures are estimated to range from \$1.5 billion to \$2.2 billion, with a midpoint estimate of \$1.9 billion.

The spending and jobs estimates outlined above are provide an order of magnitude estimate of growth in tourism jobs and tourism spending that could result through the full implementation of the Creative Community Collaborative Master Plan. However, it is important to note that the state tourism budget is only one of several major factors that affect tourism spending. Other factors exogenous to the state tourism budget, such as quality of tourism products, economic health, and weather, have significant positive and negative impacts on tourism spending within the state and could affect the spending and jobs estimates.

## Master Plan Outline

The Master Plan for the Creative Community Collaborative is divided into six sections, as described below:

**Study Process** – The first section, Study Process, documents each of the research efforts that were completed as part of the master planning process. Primary research included a situational survey of 400 households in and around Northern New Jersey, stakeholder interviews, six workshops with the stakeholder and advisory committee meetings, and monthly conference calls with the advisory committee. Secondary research included a literature review of recent, relevant studies and plans; inventory of regional tourism products; analysis of employment, wages and other local economic data. Detailed research findings can be found in the Appendix section.

**Economic Potential of the Entertainment, Arts and Retail Sector** – The Master Plan for the Creative Community Collaborative considers entertainment, arts and retail as tourism destinations, and seeks to expand and create new jobs by increasing tourism in the eight-county region. Tourism already plays a significant role in the state and regional economy. In 2007, the tourism industry supported 466,000 full-time equivalency jobs and brought in \$38 billion in tourism expenditures to New Jersey. The eight-county region generated \$7.3 billion in tourism expenditure, or 20 percent of total tourism expenditure in New Jersey. An analysis of the multiplier effects of entertainment, arts and retail jobs within the eight-county regional economy indicates that every new tourism job will, on average, add 0.7 new indirect/induced jobs to the local economy. This section evaluates the contribution of tourism to the state and regional economy and the economic impacts associated with growing the tourism industry in the state.

**Strengths, Weaknesses, Opportunities, and Threats** – ERA compiled the findings from the literature review, inventory, consumer survey, and workshop in order to create a comprehensive Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis. This SWOT analysis is used to identify regional strengths and challenges, and potential opportunities and threats to economic development in Northern New Jersey through the EAR sector.

The SWOT analysis identifies the following as key strengths and opportunities for the eight-county area:

- Northern New Jersey offers a broad mix of entertainment, arts and retail opportunities located within a small geographic area
- The proximity to the New York City Metropolitan Region and to Philadelphia provides a large and diverse tourism base for Northern New Jersey entertainment, arts and retail institutions
- The major transportation hubs, including Newark International Airport, Newark Penn Station, PATH stops, Hoboken ferry terminal and NJ Turnpike offer opportunities to capture additional tourists.
- North Jersey offers tourism opportunities for every season. Year-round activities include museums, ecological centers, retail and heritage tourism. The region also offers seasonal destinations such as ski slopes, water parks, pick-your-own farms and kayaking

The SWOT analysis identifies the following as key weaknesses and threats for the eight-county area:

- New Jersey is not perceived as a major tourism destination with the same recognition as competitive states such as Virginia or Pennsylvania
- New Jersey tourism promotion entities, including the State Division of Travel and Tourism and all Destination Marketing Organizations, operate on budgets that are significantly smaller than comparable organizations in other states
- Northern New Jersey does not offer enough packaged travel products for potential tourists
- Tourism destinations in the regions surrounding Northern New Jersey pose competitive threats to particular segments of the regional tourism economy
- Poor signage and wayfinding presented a challenge to getting tourists to many destinations
- The majority of arts and leisure trips to Northern New Jersey are day trips

**Action Plan** – The action plan identifies the principal activities that could be undertaken to expand tourism and create jobs within the entertainment, arts and retail sector within the eight-county region. The action plan is based on prior studies of New Jersey tourism and economic development, feedback from the advisory and stakeholder committee that was collected over a series of workshops, case studies, and the experience and expertise of the consulting team. The action plan prioritizes strategies; defines short, medium and long term actions; and identifies agents responsible for implementation. The plan is divided into the following three sections:

1. **State initiatives** represent actions that should be undertaken on the state level to devote greater resources to tourism promotion throughout the state. The following actions are recommended for the State of New Jersey:
  - 1.1 Increase and stabilize funding for State Division of Travel and Tourism
  - 1.2 Realign state tourism regions to reflect northern New Jersey as a tourism region
  - 1.3 Create a dedicated funding source for DMOs
  - 1.4 Strengthen tourism input into infrastructure and development decisions
  - 1.5 Create international marketing consortium
2. **Regional initiatives** represent actions that should be undertaken on the regional level in order to better support tourism promotion and development within the Northern New Jersey eight- county region. The following actions are recommended for the eight-county area:
  - 2.1 Create the 'North Jersey Tourism Alliance' as a regional tourism organization
  - 2.2 Establish the North Jersey regional brand
  - 2.3 Create Technical Assistance & Training Consortium (TA Consortium)
  - 2.4 Create Affinity Groups for special interests, such as festivals, heritage tourism, agri - tourism, eco-tourism, community arts

Figure 5 details each of the proposed regional initiatives and the associated implementation agents and potential funding sources.

**Figure 5: Master Plan for the Creative Community Collaborative – Regional Initiatives**

	Implementation Responsibility		Timing			Potential Funding
	Primary	Support	ST	MT	LT	
<b>2. REGIONAL INITIATIVES</b>						
<b>2.1 Create the 'North Jersey Tourism Alliance' as a regional tourism organization</b>						County Occupancy Fee
2.11 Draft MOU	DMO's	N Jersey Partners	x			
2.12 Recruit non-DMO members	DMO's	State Tourism	x			
2.13 Obtain operating funds	Alliance	N Jersey Partners	x			
2.14 Hire tourism development specialist (TDS)	Alliance	State Tourism	x			
2.15 Achieve full DMO coverage of region	Alliance	DMO's		x		State Tourism, local government, local donors
<b>2.2 Create a brand identity for the North Jersey region</b>						North Jersey Tourism Alliance, corporate donors, Colleges/Universities
2.21 Create branding and position statements	Alliance	TA Consortium		x		
2.22 Develop logo and promotional materials	Alliance	TA Consortium		x		
2.23 Develop website & expanded technologies	Alliance	TA Consortium		x		
2.24 Initiate PR activities	Alliance	DMO's		x	x	
2.25 Develop regional signage program	Alliance	DMO's, Highway departments		x	x	TEA - 21 grants
<b>2.3 Create Technical Assistance &amp; Training Consortium (TA Consortium)</b>						Colleges/Universities
2.31 Identify an academic lead	N. Jersey Partners			x		
2.32 Inventory local resources and programs	Universities	Alliance		x		
2.33 Conduct needs assessment of tourism industry players	Universities	Alliance		x		
2.34 Coordinate program response	Universities	Alliance		x		
<b>2.4 Create Affinity Groups for special interests, such as Festivals, Heritage Tourism, Agri - Tourism, Eco-Tourism, Community Arts</b>	Sponsors Attractions Groups	Alliance, TA Consortium		x		Sponsors, attractions, groups, foundations, corporations

3. **Local initiatives** represent actions that should be undertaken on the county level in order to better support tourism promotion and development. The following actions are recommended for the counties and municipalities in the eight-county area:

- 3.1 Strengthen local product offering
- 3.2 Strengthen international neighborhood product
- 3.3 Revitalize visitor centers at Turnpike rest stops
- 3.4 Facilitate strategic retail development (sports venues, transit nodes, downtowns)
- 3.5 Create North Jersey as "Stay Quarters" for NYC visits program
- 3.6 Foster development of artist housing and support facilities

Figure 6 details each of the proposed regional initiatives and the associated implementation agents and potential funding sources.

**Figure 6: Master Plan for the Creative Community Collaborative-- Local Initiatives**

	Implementation Responsibility		Timing			Potential Funding
	Primary	Support	ST	MT	LT	
<b>3. LOCAL INITIATIVES</b>						
<b>3.1 Strengthen Local Product Offering</b>						
3.11 Increase development of tour packages	Attractions Hotels	DMO's, Alliance, TA Consortium	x	x	x	Attractions, hotels
3.12 Create themed attraction packages	Attractions	DMO's, Alliance	x	x	x	Attractions, DMO's
3.13 Create promotions around high potential products	Attractions	DMO's, Alliance	x	x	x	Attractions, DMO's
3.14 Leverage Hub & Spoke potential of mega attractions	Attractions	DMO's, Alliance	x	x	x	Attractions, DMO's
<b>3.2 Strengthen ethnic neighborhood product</b>						
						Local Community, local government, TA Consortium
3.21 Identify candidate neighborhoods	DMO	Alliance	x			
3.22 Identify local leadership (BID's community groups)	DMO	Alliance	x			
3.23 Build local capacity (tech assistance)	TA Consortium	Alliance		x		
3.24 Develop local branding (signage & brochures)	Community	TA Consortium		x	x	
<b>3.3 Revitalize visitor centers at Turnpike rest stops</b>						
						Corporate donors, Turnpike Authority
3.31 Create and install pilot program(s)	Alliance	DMO State Tourism Attractions		x		
3.32 Roll out full program	Alliance	DMO State Tourism Attractions		x		
3.33 Expand to Newark Int'l Airport and Port of Elizabeth	Alliance	PANYNJ			x	PANYNJ
<b>3.4 Facilitate strategic retail development (sports venues, transit nodes, downtowns)</b>						
						CDBG, SBA, New Markets Tax Credits
3.41 Inventory available federal and state programs	TA Consortium	Stakeholders		x		
3.42 Conduct national best practice survey	TA Consortium	Stakeholders		x		
3.43 Propose new tools as appropriate	TA Consortium	Stakeholders		x		
3.44 Identify priority opportunities	TA Consortium	Stakeholders		x		
<b>3.5 Create North Jersey as "Stay Quarters" for NYC visits program</b>						
3.51 Formalize and execute program	Alliance	Select attractions and hotels; NYC-proximate jurisdictions; Newark Int'l Airport; NJ Transit		x		Attractions and hotels, local government, PANYNJ
<b>3.6 Foster Development of Artist Housing and Support Facilities</b>						
3.61 Inventory available incentives and programs	Alliance	TA Consortium				
3.62 Identify candidate opportunities	DMO's	Alliance, Local jurisdictions		x	x	Tax incentives, foundations, housing funds, rehabilitation/revitalization funds
3.63 Identify/create project developer	Local jurisdictions	DMO's, Alliance		x	x	

## II. The Study Process

The study process documents the various research efforts that were completed as part of this master planning process. Primary research included a situational survey of 400 households in and around northern New Jersey, stakeholder interviews, six workshops with the stakeholder and advisory committee meetings, and monthly conference calls with the advisory committee meeting. Secondary research included a literature review of recent, relevant studies and plans; inventory of regional tourism products; analysis of employment, wages and other local economic data. The process of developing the plan was a collaborative effort, combining local knowledge and expertise, and the ERA Team's experience in tourism development gained through assignments around the country. Detailed findings can be found in the Appendix section. The study process is outlined below:

1. **Literature Review:** ERA began the master planning process with a review of prior studies and projects that are closely related to the Creative Communities Master Plan. Tourism in New Jersey has been extensively studied and many active plans are currently in various phases of implementation, including Arts Plan New Jersey (2008), the Union County Tourism Master Plan (2007) and the New Jersey Wayfinding Plan (2009). ERA reviewed these three studies and eleven more in order to develop a comprehensive understanding of existing conditions and planned initiatives for tourism development in New Jersey. The Master Plan for the Creative Community Collaborative builds upon prior studies, plans and other initiatives to create an economic development strategy that is in line with the stated tourism development goals of the region. A complete copy of the literature review can be found in the Appendix section of this report.
2. **Inventory** – The eight-county region of northern New Jersey houses a broad mix of entertainment, arts and retail offerings. From east to west, northern New Jersey offers world-class tourism destinations, including Main Street shopping in Hoboken; the Historic Trilogy (Liberty State Park, Statue of Liberty and Ellis Island) in Jersey City; Cape Liberty Cruise Port in Bayonne; the Meadowlands Sports Complex (IZOD Center, Giants Stadium, and Meadowlands Racetrack) in East Rutherford; Aviation Hall of Fame in Teterboro; Red Bull Stadium in Harrison; Prudential Center, Newark Museum and the Ironbound District in Newark; Paper Mill Playhouse in Millburn; New Jersey Performing Arts Center in Newark; the Edison National Historic Site in West Orange; Morristown National Historic Park in Morris County; Delaware Water Gap National Park in Warren and Sussex Counties, plus wineries, farm tours, art galleries and regional and outlet malls. ERA began the project by completing a comprehensive inventory of all of the entertainment, arts and retail assets in the region. With the help of the North Jersey Partners

Advisory committee, ERA identified EAR destinations that are “group ready”. Group ready sites are those which have the organizational capacity necessary to handle visitor growth.

ERA considered twelve different types of entertainment, arts, and retail attractions and compiled an inventory of these assets within the eight-county region. The following list identifies each of twelve EAR sectors and defines the types of attractions that comprise each sector.

#### Entertainment

- Agri-tourism – Farm, Greenhouse, Creamery, Vineyard, Tree Farm, Fairgrounds
- Ecotourism – Zoo, Garden, Ecological Center
- Heritage Tourism – Historic Site, Historic Village Reenactment, Historic Theater, Historic Site with Museum, Historic Park
- Museums – Aviation, Science, Naval, History, Science & Arts, Crafts and Children's Museums
- Outdoor Recreation – Ski, Golf, Stables, Open Space, Sailing, Biking
- Spectator Sports – Arena, Stadium, Horse Racing
- Family Fun – Dinner Theater, Amusement Park, Zoo, Theme Park, Water Park, Ice Rink

#### Arts

- Visual Arts – Art Gallery, Art Museum, Arts Center
- Dance – Performing Art Centers and other professional dance performance venues
- Music – Performing Art Centers, Symphony Halls, and other professional music performance venues
- Theater – Performing Art Centers, Other Professional Theaters, Community Theater, Children’s Theater, Dinner Theater, Summer Stage, Vaudeville

#### Retail

- Shopping – Regional Mall, Outlet Mall, Traditional Main Street, Discount, Antiques

A complete inventory of all of the entertainment, arts and retail attractions within the eight-county region can be found in the Appendix section.

3. **Data Analysis** – ERA analyzed employment trends in Northern New Jersey, paying particular attention to employment trends in the Entertainment, Arts and Retail sectors. ERA considered historic levels of employment and growth patterns within various sectors of the creative economy. ERA also identified the multiplier effects of various EAR jobs within the local economy.
4. **Situational Survey** – The ERA team conducted a 400-person telephone survey in order to gauge local perceptions and usage patterns for the entertainment, arts and retail sector in northern New Jersey. The survey targeted residents from four groups: (1) urban counties in northern New Jersey; (2) non-urban counties in northern New Jersey; (3) urban counties within 50 miles of

northern New Jersey, excluding northern New Jersey, and (4) non-urban counties within 50 miles of northern New Jersey, excluding northern New Jersey. The survey aims to answer the following questions:

- What are respondents' perceptions of northern New Jersey as a destination for entertainment, arts and retail activities?
- In what type of leisure, arts or recreational activities do respondents participate regularly?
- In what type of leisure, arts or recreational activities do respondents participate within North Jersey?
- What is the level of awareness for specific arts and recreational venues and places in North Jersey?
- What are the gaps in entertainment, arts and retail offering of northern New Jersey?
- What sources of information do respondents use for arts and recreational activities?

A copy of the survey questionnaire and top-line results can be found in the Appendix section.

5. **Interviews** – ERA spoke directly with a number of stakeholders and other professionals in the tourism industry in order to craft a master plan that responds directly to the needs of the region, and also incorporates lessons learned from successful comparable projects in the country. ERA spoke with New Jersey government officials, destination marketing organization representatives in New Jersey and out-of-state and other key stakeholders.
6. **Advisory Committee** – In 2008, prior to the start of the master plan process, the Newark Alliance convened a group of individuals who are leaders in the arts, entertainment, retail and tourism industries in New Jersey. This working group, the Advisory Committee, framed the goals of this planning initiative, applied for federal WIRED funding and selected the consulting team. Since the kick-off of the master planning process, the Advisory Committee has played an active role in this project. ERA sought the input of the Advisory Committee through monthly conference calls and three participatory workshops. Additionally, the advisory committee helped to frame the survey questionnaire, provided information about group-ready sites in each EAR category, and reviewed and helped guide this master plan text. A complete list of Advisory Committee members can be found in the Appendix section.
7. **Stakeholder Committee** – The Advisory Committee identified a group of local leaders of entertainment, arts, retail, hospitality, and tourism promotion organizations who were invited to join the master planning process as a Stakeholder Committee. This Stakeholder Committee is comprised of over 75 individuals. The approval and engagement of these stakeholders will be critical to the successful implementation of this master plan, therefore the Master Plan team engaged this group early in the planning process. The Stakeholder Committee participated in

three planning workshops and helped shape the recommendations of the master plan. A complete list of Stakeholders Committee members can be found in the Appendix section.

8. **Workshops** – The ERA Team conducted three participatory workshops in order to gather input and solicit feedback on the master plan. Each workshop was broken into two parts: a meeting with the Advisory Committee that covered regional implications of the master plan, and a combined Advisory and Stakeholder Committee meeting that followed in which technical details about the plan’s implementation were discussed.

On June 2, 2009, The ERA Team conducted an Advisory and Stakeholder Committee workshop with over 40 individuals who represented various entertainment, arts and retail sites and tourism and economic development organizations in the region. The three-hour workshop consisted of a brief presentation and three break-out sessions in which all of the stakeholders participated. The June 2, 2009 stakeholder workshop had three overriding goals:

- Identify the region’s strengths, weaknesses, opportunities and threats (SWOT) with respect to the entertainment, arts and retail sectors
- Expanded the group of individuals involved in the Creative Community Collaborative and who will help to implement the plan
- Introduce the regions entertainment, arts and retail leaders in order to facilitate future collaboration

On July 20, 2009, the ERA Team and the North Jersey Partners convened a second series of meetings with the Advisory and Stakeholder Committees. The purpose of the meeting was to discuss progress to date and to refine preliminary recommendations and strategies for the Creative Community Collaborative Master Plan.

There were 28 Advisory and Stakeholder Committee members in attendance at the second workshop. These members represented people from the public, private and workforce sectors encompassing a gamut ranging from the arts, entertainment, and sports fields to education, industry and cultural and historic institutions throughout Northern New Jersey. The ERA Team presented results from the SWOT Analysis and reviewed preliminary planning strategies in both the advisory and stakeholder committee meetings. The July 20, 2009 workshop had three overriding goals:

- Define actionable strategies for enhancing the entertainment, arts and retail sectors in North Jersey
- Identify potential implementation agents and funding sources for each strategy
- Identify short-, mid- and long-term priorities for the action plan

A third Advisory Committee and Stakeholder workshop was held on October 5, 2009. The goal of the workshops was to review the submitted draft master plan and solicit feedback.

### **III. Economic Potential of the Entertainment, Arts and Retail Sector**

The Creative Community Collaborative WIRED strategy is a research project aimed at spurring job creation by leveraging regional assets in the Entertainment, Arts, and Retail sector. This master plan considers entertainment, arts, and retail as tourism destinations, and provides strategies for expanding tourism to the state and the region. By bringing new tourists to northern New Jersey, extending the length of stay of existing tourists, and encouraging residents of northern New Jersey to act as tourists in their own state more frequently, the demand for entertainment, arts and retail goods and services will rise, creating new jobs both within the EAR sector and within support sectors.

#### **The Contribution of Tourism to the New Jersey Economy**

Each year since 2003, the State of New Jersey has commissioned Global Insight to conduct a study to measure the contribution of tourism to the state economy. The following section summarizes the results of the most recent study, NJ Tourism: An Economic Juggernaut (2008), as it pertains to the Creative Communities Master Plan. The study demonstrates that tourism is a substantial source of revenue and employment for the State of New Jersey, and that the scale of tourism in the state is projected to grow.

The tourism industry is not classified as an industry by the Bureau of Labor Statistics North American Industry Classification System (NAICS). In order to analyze trends in tourism employment, Global Insight identified the specific subsectors that comprise the tourism industry and measured employment, wage and spending trends within these subsectors. If the tourism industry was a NAICS sector, then it would be the third largest private sector employer in the state, after health care/social assistance and retail trade. In 2007, the tourism industry supported 466,000 full-time equivalency jobs, 384,000 of which were directly linked to the core tourism industry.<sup>4</sup> Core tourism jobs accounted for 9.4 percent of all nonfarm jobs in 2007.

The travel and tourism industry brought in \$38 billion<sup>5</sup> in tourism expenditures to New Jersey in 2007. The eight-county region generated \$7.3 billion in tourism expenditure, or 20 percent of total tourism expenditure in New Jersey. Greater Atlantic City captured 36 percent of the state's tourism expenditure.

Tourism is a highly local industry and spending for tourism remains largely within the state. Of the \$38 billion in tourism expenditures, \$27 billion stayed within New Jersey, and the remainder (\$11 billion) leaked to goods and services providers located outside of the state. Import leakage represents tourism dollars spent on goods and services produced outside of the state. New Jersey's

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<sup>4</sup> Core tourism spending represents expenditures at businesses that directly provide goods and services to the visitor, such as restaurants and hotels.

<sup>5</sup> NJ Tourism: An Economic Juggernaut, Global Insight, 2008

strong 70 percent retention of tourism spending is among the highest in the region and helps to support job creation.

## **Growing the Tourism Economy in Northern New Jersey**

New Jersey and the northern New Jersey region have the two most important components required to grow tourism: a variety of quality attractions and access to a large pool of potential visitors that live within a one-day drive. Global Insight predicts that the number of visitors to New Jersey will continue to grow between 2008 and 2009. Furthermore, the economic downturn has caused families to reduce travel spending and take vacations closer to home. The trend the media has dubbed as a “staycation” is projected to boost tourism activity in New Jersey as the country recovers from the economic downturn. In 2007, the number of in-state visitation in New Jersey increased by 12 percent due to residents vacationing closer to home.

Tourism was New Jersey’s third-fastest growing industry in 2007 and has been growing steadily for the last five years. Since 2002, total tourism expenditures have increased annually between 0.9 and 7.0 percent, with an average annual growth in tourism expenditures of 4.5 percent between 2002 and 2007. Between 2006 and 2007, New Jersey domestic visitation grew by 5.8 percent.

New Jersey’s proximity to New York City and Pennsylvania makes it a natural destination for tourism, which explains why tourism to the state has grown in spite of low state tourism budgets. However, tourism has not achieved its full potential in the state. Visitors come for the day and trips are typically singular in destination. The challenge for this master plan is to increase internal tourism, bring more tourists to the state, encourage tourists who already visit to stay longer, and capture tourists who might otherwise skip New Jersey in favor of visiting New York City or Philadelphia.

## **Maximizing Job Growth in the Tourism Industry**

ERA analyzed the multiplier effects of various entertainment, arts and retail jobs within the eight-county regional economy in order to identify specific tourism opportunities with the greatest job creation potential. ERA uses the Regional Input-Output Modeling System (RIMS II), in order to estimate the economic impact adding new Entertainment, Arts and Retail jobs to the Northern New Jersey economy. The RIMS II model contains a detailed mapping of relationships between different industries, and helps determine the multiplier effects associated with each new industry job in the eight-county region. Figure 7 details the multiplier impacts associated with each type of tourism job.<sup>6</sup>

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<sup>6</sup> Direct jobs refer to the permanent jobs created specifically for the tourism product or service. Indirect jobs consist of permanent jobs created by businesses which supply goods and services to the tourism sector. Induced impacts consist of permanent jobs created by the spending of direct and indirect employees. Total impacts consist of direct, indirect, and induced impacts in terms of jobs, wages, and output.

**Figure 7: Multiplier effect of tourism jobs in Northern New Jersey 8-County Region**

RIMS Industry	Direct Jobs	Indirect/ Induced Jobs	Total Jobs
<u>EAR Products</u>			
Wineries	1	2.0	3.0
Independent artists, writers, and performers	1	1.3	2.3
Museums, historical sites, zoos, and parks	1	1.3	2.3
Retail trade	1	0.5	1.5
Spectator sports	1	0.5	1.5
Other amusement, gambling, and recreation industries	1	0.4	1.4
Fitness and recreational sports centers	1	0.3	1.3
Bowling centers	1	0.3	1.3
Performing arts companies	1	0.2	1.2
<u>EAR Services</u>			
Scenic and sightseeing transportation and support activities for transportation	1	1.5	2.5
Travel arrangement and reservation services	1	0.8	1.8
Other accommodations	1	0.6	1.6
Hotels and motels, including casino hotels	1	0.5	1.5
Promoters of performing arts and sports and agents for public figures	1	0.4	1.4
Transit and ground passenger transportation	1	0.4	1.4
Food services and drinking places	1	0.3	1.3

Source: RIMS II, Regional Product Division, Bureau of Economic Analysis, Economics Research Associates

The jobs multiplier analysis indicates that for every new Tourism Product job (e.g. jobs at sites where tourists go, such as museums, malls, wineries, galleries), an average of 0.7 additional indirect/induced jobs are added to the local economy. For every new Tourism Service job (e.g. jobs in the tourism service sector, such as hotels, tour operators, transportation, restaurants), an average of 0.6 additional indirect/induced jobs are added to the local economy. The tourism industries that have the greatest multiplier effect include wineries, independent artists, museums, historical sites, zoos, parks, and sightseeing transportation.

## Increased State Tourism Spending Yields Job Growth and increased Tourism Spending

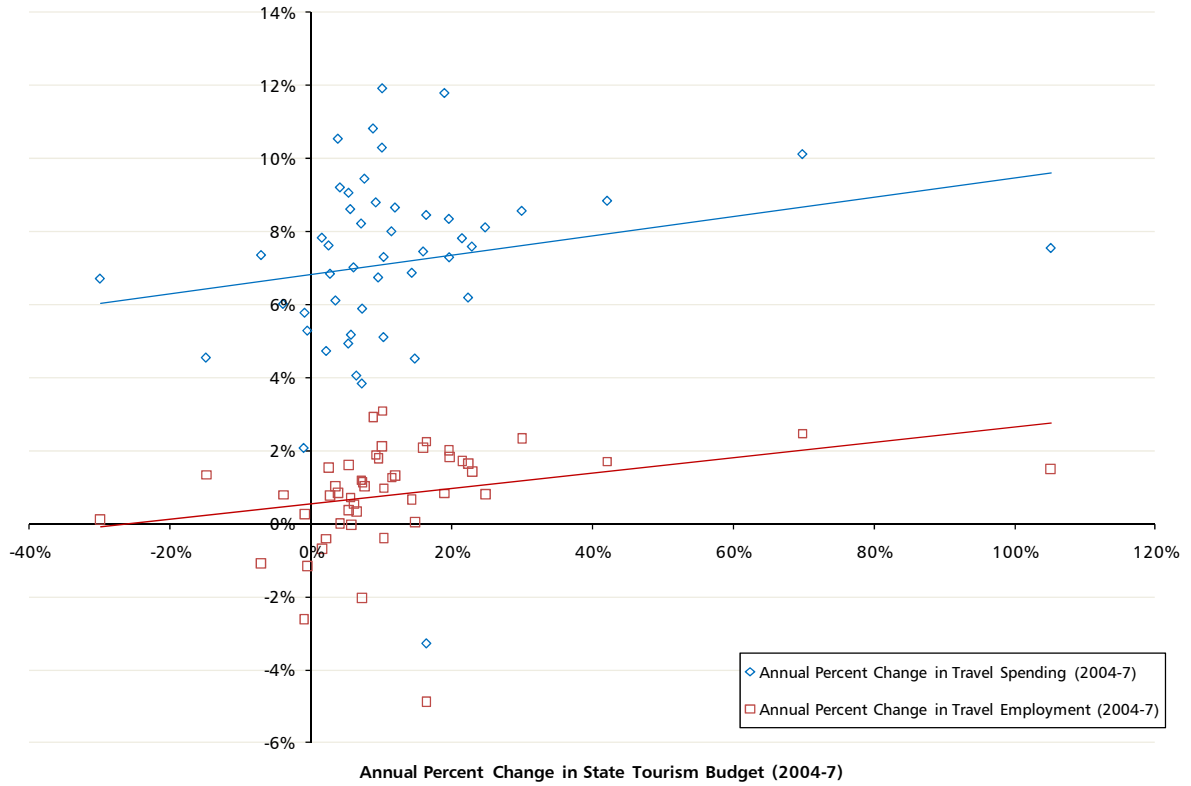
Growth in tourism budgets are correlated with growth in tourism jobs and growth in tourism spending. ERA evaluated trends in state tourism spending, state travel employment, and tourism spending in New Jersey over the most recent three-year cycle – from 2004 to 2007. The relationship between annual percent change in state tourism budget, travel spending, and travel employment is plotted in Figure 8.

Between 2004 and 2007 the average annual growth in state tourism budgets in the United States was 12.1 percent. Over the same period of time, the average annual growth in state travel spending in the United States was 7.2 percent. Change in state travel spending as compared to change in state tourism budgets over the last three-year cycle is represented by the blue diamonds and blue trend line in Figure 8.

Between 2004 and 2007 the average annual growth in state travel employment in the United States was 0.8 percent. Change in state travel employment as compared to change in state tourism budgets over the last three-year cycle is represented by the red squares and red trend line in Figure 8.

As indicated by the trend lines in Figure 8, the larger the percentage increase in state tourism budgets, the greater the percentage increase in both travel employment and travel spending. Based on the slopes of the trend lines, for every 1 percent increase in state tourism budget, there is a corresponding 0.6 percent increase in travel spending and 0.07 percent increase in travel employment.

**Figure 8: Every 1% increase in state tourism budget yields a corresponding 0.6% increase in travel spending and 0.07% increase in travel employment**



Source: US Travel Association Power of Travel 2008

## IV. Strengths, Weaknesses, Opportunities, and Threats

ERA compiled the findings from the literature review, inventory, consumer survey and workshop in order to create a comprehensive Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis. This SWOT analysis is used to identify regional strengths and challenges, and potential opportunities and threats to the EAR sector and economic development in northern New Jersey. The following section summarizes the key findings of the SWOT Analysis.

### Strengths and Opportunities

The eight-county region of northern New Jersey houses a broad mix of entertainment, arts and retail offerings. From east to west, northern New Jersey offers world-class tourism destinations, including Main Street shopping in Hoboken; the Historic Trilogy (Liberty State Park, Statue of Liberty and Ellis Island) in Jersey City; Cape Liberty Cruise Port in Bayonne; the Meadowlands Sports Complex (IZOD Center, Giants Stadium, and Meadowlands Racetrack) in East Rutherford; Aviation Hall of Fame in Teterboro; Red Bull Stadium in Harrison; Prudential Center, Newark Museum and the Ironbound District in Newark; Paper Mill Playhouse in Millburn; New Jersey Performing Arts Center in Newark; the Edison National Historic Site in West Orange; Morristown National Historic Park in Morris County; Delaware Water Gap National Park in Warren and Sussex Counties, plus wineries, farm tours, art galleries and regional and outlet malls.

The SWOT analysis indicated that the following attributes represent the key strengths of the northern New Jersey:

**Product Mix:** Northern New Jersey offers a broad mix of entertainment, arts and retail opportunities in many categories. The broad variety of tourism opportunities located within a small geographic area was frequently cited as one of the most notable strengths of the region.

- *Retail* – Within the retail sector, North Jersey offers an abundance of shopping experiences, including outlet malls, regional malls, village shopping, antiques and ethnic retail. Group-ready shopping districts in North Jersey include Jersey Gardens Mall, Downtown Montclair, Hudson River Waterfront, Newark's Ironbound District, Hoboken's Washington Street, Newport Centre Mall, and Elizabeth's IKEA.
- *Arts* – The vibrant arts institutions in Newark, which include the Newark Museum and galleries such as City Without Walls and Aljira, have led to creation of a Downtown Newark Arts District.
- *Agri-tourism* – Like much of the region's produce, the agri-tourism industry in North Jersey has grown organically. The region's pick-your-own farms have developed a large tourism base through a strong word-of-mouth reputation. Some of the region's Group Ready farms

include Alstede Farms (Chester), Valley Shepherd Creamery (Long Valley), Wightman's Farms (Morristown), Bobolink Dairy & Bakehouse (Vernon), Donaldson Farms (Hackettstown), and Mackey's Orchards (Belvidere).

**Proximity:** The proximity to New York City and Philadelphia provides a large and diverse tourism base for North Jersey entertainment, arts and retail institutions.

- *Outdoor recreation and agritourism* – Outdoor recreation and agritourism activities, are prevalent in the North Jersey region and limited within the dense cities in and around North Jersey. The pick-your-own farms in North Jersey have strong brand recognition based on word-of-mouth advertising. High quality outdoor recreation activities, such as hiking, rock climbing, kayaking, and camping, are also available in North Jersey at the Delaware Water Gap and the Palisades, however the region faces competition from the nearby Lehigh Valley in Pennsylvania and the Catskills and Adirondacks in Upstate New York. North Jersey could better capitalize on the proximity of the surrounding densely-populated cities by offering more services (lodging, tourism packages) to outdoor recreation visitors and expanding its network of group-ready farms.
- *Cooperative Marketing* – The North Jersey region should be a regional partner with state and local tourism entities and take advantage of regional promotional opportunities as they arise. Areas and agencies that North Jersey could partner with include South Jersey, the Atlantic region, NYC&Company, the New York State Division of Tourism, Pennsylvania Tourism Office and Greater Philadelphia Tourism Marketing.

**Transportation Hubs:** The major transportation hubs, including Newark International Airport, Newark Penn Station, PATH stops, Hoboken Ferry Terminal and NJ Turnpike offer opportunities to capture additional tourists. Newark Liberty International serves about 33 million passengers each year. Of the passengers that leave the airport, many depart directly to New York without stopping at any New Jersey sites or attractions. For this reason, stakeholders cited Newark Airport as the most underutilized tourism asset in northern New Jersey region. All of these transportation hubs could enhance the local entertainment, arts and retail sector by (1) working with local DMOs to better understand priorities for tourism promotion in the region (2) promoting local destinations through billboards and information stations; and (3) working with tourism operators to create packaged tours that depart and return to the transportation hub.

**DMOs:** New Jersey has a growing DMO network and other agencies that promote tourism. There are currently six entities that are recognized as DMOs by the state that serve the northern New Jersey region: Greater Newark CVB; Hudson County Division of Tourism; Meadowlands Liberty CVB; Morris

County Visitors Center; Sussex County Chamber of Commerce and Warren County Regional Convention and Visitor's Bureau. Other agencies that play a significant role in tourism promotion in Northern New Jersey and throughout the State include the New Jersey Division of Travel and Tourism, Newark Alliance, County Freeholders, Port Authority of New York and New Jersey and Welcome Centers.

**4-Season:** Northern New Jersey offers tourism opportunities for every season. Activities such as arts, museums, ecological centers, retail and heritage tourism are open year-round. The region also offers seasonal destinations such as ski slopes, water parks, pick-your-own farms and kayaking. This broad range of activities means that there is always something for tourists to do in northern New Jersey.

### **Weaknesses and Constraints**

Northern New Jersey lacks a tourism identity. Visitors surveyed as part of the ERA Survey (see Appendix) identified particular destinations, such as NJ PAC, Papermill Playhouse, Prudential Center, and Liberty State Park. However, the eight-county area does not have a cohesive or identifiable tourism identity and has never been marketed or branded as a region. Creating a tourism identity or identities for northern New Jersey, and bringing awareness to the region as a viable tourism destination, is a key challenge.

The SWOT analysis indicated that the following attributes represent additional challenges for the promotion of the entertainment, arts and retail sectors in Northern New Jersey:

**Funding:** There is no stable funding source for tourism in New Jersey. New Jersey State's promotional budget is significantly smaller than the promotional budgets for Pennsylvania and New York, creating a competitive challenge for the state. Furthermore, while New Jersey levies an occupancy fee on hotel rooms, the majority of the hotel tax is siphoned into the general fund, and only a small share is directed specifically to tourism.

**Perception:** Northern New Jersey is not perceived as a major tourism destination with the same recognition as competitive states such as Virginia or Pennsylvania. The lack of a tourism identity can be attributed both to the diversity within the region and to the long-standing, media-driven and largely inaccurate perception of the region as polluted, corrupt or simply a pass-through between New York and Philadelphia. Additionally, the Jersey Shore and Atlantic City are more conventionally associated with tourism and recreation within New Jersey.

**Products:** Northern New Jersey does not offer enough packaged travel products for potential tourists. Some target markets that should be considered for packaged tourism promotion include convention-goers and travelers flying into Newark Liberty Airport. In addition to packaging existing

tourism destinations, additional product development is required in order to ensure that there are quality tourism opportunities.

**Competitive Threats:** Tourism destinations in the regions surrounding Northern New Jersey pose competitive threats to particular segments of the regional tourism economy. The Pocono Mountains of northeastern Pennsylvania present competition to New Jersey's Delaware Water Gap in the outdoor recreation sector. Morristown and the Heritage Trail could compete with Colonial Williamsburg for heritage tourists. The cranberry bogs in South Jersey and the farm stands of Long Island pose competition to the agritourism industry in northern New Jersey. Finally, art museums and galleries in northern New Jersey must compete with the world renowned galleries and museums of New York City and must frequently overcome the perception that "real art" is in New York City.

The strong competition in each tourism category also creates an opportunity for northern New Jersey. The competitive destinations serve to expand the tourism market and increase the number of people who are interested in the types of tourism opportunities available in northern New Jersey, especially if tourism stays or visitation priorities can be influenced in New Jersey's favor

**Traffic and Way-finding:** Stakeholder conversations indicated that poor signage and wayfinding presented a challenge to getting tourists to many destinations, especially heritage and agri-tourism sites that are in more rural areas. The State of New Jersey Wayfinding Master Plan has proposed signage and communication improvements that would clarify tourism opportunities to drivers. However the Wayfinding Master Plan has not been formally endorsed by the state and currently lacks funding for implementation.

**Length of Stay:** The majority of arts and leisure trips to northern New Jersey are day trips, and one of the key challenges to address in the plan is increasing visitors' length of stay. The ERA survey conducted of residents living within 50 miles of the eight-county area indicates that typically, arts and leisure visits to northern New Jersey do not include an overnight stay. Only 16 percent of the sample population stayed overnight in the past year. The FY2006p Visitor Profile completed by D.K. Shifflet & Associates indicates that of all leisure visitors to New Jersey, 50 percent stayed overnight and 50 percent made a day trip. The average length of stay in New Jersey for overnight leisure visitors was 2.24 nights, lower than the national average of 2.91 nights. (FY2006p Visitor Profile)

Longer stays will promote economic development by enhancing multiple tourism service providers, not just a single destination. By creating opportunities for existing visitors to stay longer, northern New Jersey hotels, restaurants, retailers and other tourism destinations all benefit.

Figure 9 details the Strengths, Weaknesses, Opportunities, and Threats to the Entertainment, Arts and Retail sector that were identified as part of the June 2, 2009 Stakeholder Workshops.

**Figure 9: North Jersey Creative Communities SWOT Analysis**

<b>STRENGTHS</b>
<ul style="list-style-type: none"> <li>• Diversity of tourism opportunities, including arts, culture, outdoor recreation, spectator sports, parks, amusement parks, zoos, ecological centers and more</li> <li>• Tourism opportunities for every season. Year-round: agritourism, ecotourism, museums and galleries, retail. Seasonal: skiing, water parks, pick-your-own farms, kayaking</li> <li>• Dedicated agencies that promote tourism, including NJ Division of Travel and Tourism, Newark Alliance, Newark CVB, and 18 Welcome Centers</li> <li>• Growing DMO network</li> <li>• Nonprofits that manage ecotourism and outdoor recreation (Meadowlands Commission, Trout Unlimited, NY/NJ Trail Conference) have strong organizational capacity</li> <li>• Pick-your-own farms have a strong word-of-mouth brand</li> <li>• Championship teams play in the region</li> <li>• Newark is an anchor for northern New Jersey arts</li> <li>• Northern New Jersey has an abundant supply of retail opportunities, including strip malls, mega malls, village shopping, waterfront (Hudson River), retail adjacent to railroad stations, downtown shopping districts, outlet malls and ethnic neighborhood retail</li> <li>• No sales tax on clothes brings shoppers from NY</li> <li>• Hotels in NYC promote shopping in New Jersey</li> </ul>
<b>WEAKNESSES</b>
<ul style="list-style-type: none"> <li>• Marketing and branding; Northern New Jersey is not known for its tourism opportunities</li> <li>• Northern New Jersey counties are not marketed as a region</li> <li>• Tourism in New Jersey is equated with The Shore and Atlantic City</li> <li>• Various regional designations (e.g. Highlands, Gateway, Skylands, North Jersey) can be confusing</li> <li>• Not enough people know about tourism web resources</li> <li>• There is uneven DMO coverage throughout Northern New Jersey</li> <li>• Poor signage and wayfinding limit tourists who arrives by car</li> <li>• Trips from NYC and elsewhere are single destination day trips</li> <li>• No weekend rail service to outlying communities</li> <li>• Limited buses / public transport to rural areas</li> <li>• Lack of parking in small towns</li> <li>• Lack of understanding about the economic value of tourism</li> <li>• Many entertainment sites lack revenue-generating opportunities</li> <li>• There are no commercial art galleries</li> <li>• Ethnic retail has much greater potential but the neighborhoods are not ready for visitor spikes</li> </ul>

**OPPORTUNITIES**

- Proximity to New York City and Philadelphia create large tourism markets from which to draw
- Major transportation hubs, including Newark International Airport, Newark Penn Station, PATH stops, ferry terminals and NJ Turnpike create opportunities to capture additional tourists
- Educate service workers about attractions/directions
- Advertise tourism opportunities to the festival-goers and convention-goers
- Create a statewide PR program for tourism
- Promote cooperation between DMOs
- Promote private/public collaboration for tourism promotion
- Better utilize internet resources for promotion and organization
- Increase visitor length of stay
- Use Jersey Fresh brand to promote state agritourism
- Promote other components of state history in addition to the American Revolution, including industrial, agricultural, and immigration (Ellis Island)
- Make ethnic retailing and restaurants more accessible
- Use Xanadu as hub for additional tourism activity

**THREATS**

- There are no stable funding sources for DMOs and tourism sites that receive state grants
- Higher tourism funding in other states now and the future
- Perception of New Jersey as a rustbelt or a pass-through between NY and PA
- Competition from Poconos for ecotourism
- Competition from Williamsburg, VA for heritage tourism
- Competition from NYC for arts
- Competition from Pinelands for agritourism
- Budget cuts on the state, local and federal level
- Lack of funding for marketing
- Lack of stable funding for DMOs
- Arts are perceived as frivolous
- Fractured media market (NYC, Philadelphia, N/S New Jersey)

## V. Action Plan

The action plan presented in this section identifies the principal activities that could be undertaken to expand tourism and create jobs within the EAR sector within the northern New Jersey region. ERA has structured its action plan to follow the conceptual framework of the WIRED initiative, creating a strategy that has quantifiable and measurable goals. The action plan addresses state, regional and local actions that can expand the EAR sector. The plan prioritizes strategies; defines short, medium and long term actions; and identifies agents responsible for implementation. The action plan is based on prior studies of New Jersey tourism and economic development, feedback from the advisory and stakeholder committee that was collected over a series of workshops, case studies, and the experience and expertise of the consulting team.

The action plan is divided into the following three sections:

- **State Initiatives** represents actions that should be undertaken on the state level to devote greater resources to tourism promotion throughout the state.
- **Regional Initiatives** represent actions that should be undertaken on the regional level in order to better support tourism promotion and development within the northern New Jersey eight-county region.
- **Local Initiatives** represent actions that should be undertaken on the county level in order to better support tourism promotion and development.

### 1. State Initiatives

The following initiatives represent actions that should be undertaken on the state level in order to better support tourism promotion and development across the state and within the counties of the Northern New Jersey area.

#### 1.1 Increase and stabilize funding for State Division of Travel and Tourism

The State of New Jersey should increase and stabilize funding for the State Division of Travel and Tourism. While tourism is one of the largest industry sectors in the New Jersey economy, the state has not invested sufficiently in tourism promotion and development. Moreover, the states with which New Jersey competes most intensely for tourists, New York and Pennsylvania, dedicate more funds to tourism promotion.

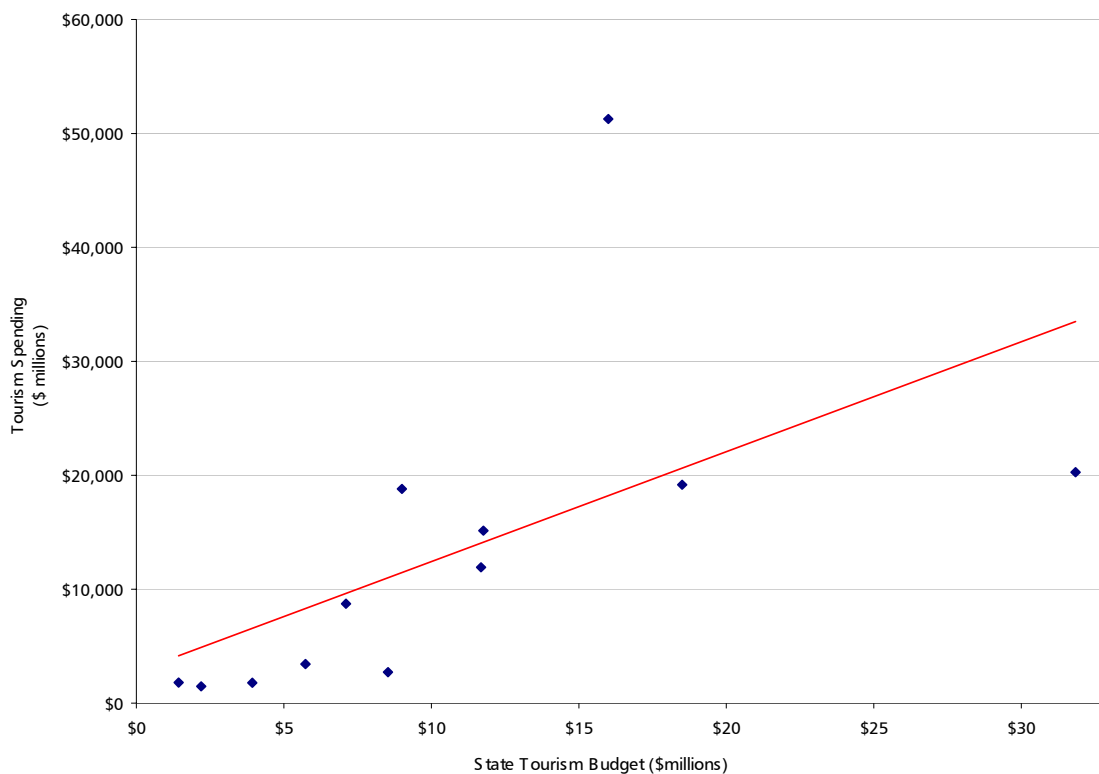
On a macro level, many variables affect tourism spending, including current economic conditions, tourism product offerings, and the mix of private sector tourism and hospitality entities engaged in marketing and

promotion. In addition to these factors, state tourism budgets have shown themselves to play an important role in establishing a foundation that supports tourism in a state.

To document the correlation between state tourism budgets and tourist expenditures, ERA measured tourism budgets and tourism spending for twelve states on the northeastern seaboard.<sup>7</sup> The analysis focused on northeastern seaboard states in order to compare states with similar tourist markets and also to remove outliers associated with states with more significant tourism economies, such as Nevada and Hawaii.

As seen in Figure 10, there is a positive correlation between state tourism budgets and tourism spending. In other words, all other things being equal, the more a state spends on tourism the higher the returns in terms of tourism spending.

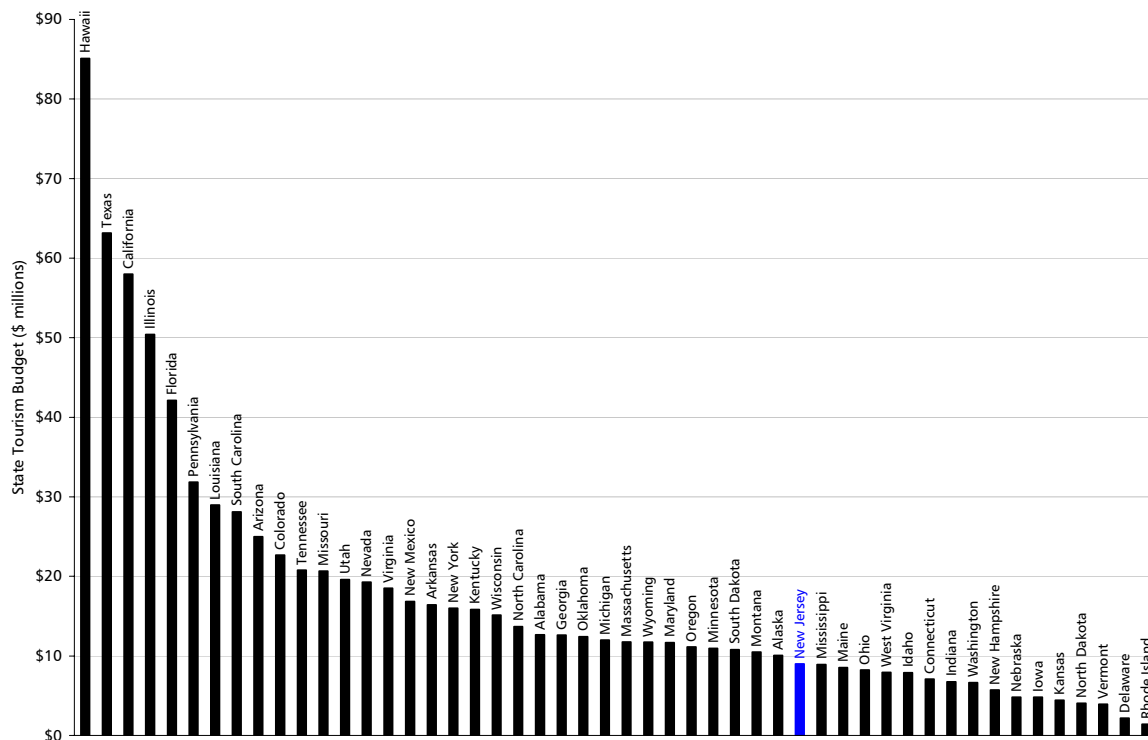
**Figure 10: Relationship between state tourism budget and tourism spending**



<sup>7</sup> The eastern seaboard states considered include Pennsylvania, Virginia, New York, Massachusetts, Maryland, New Jersey, Maine, Connecticut, New Hampshire, Vermont, Delaware and Rhode Island.

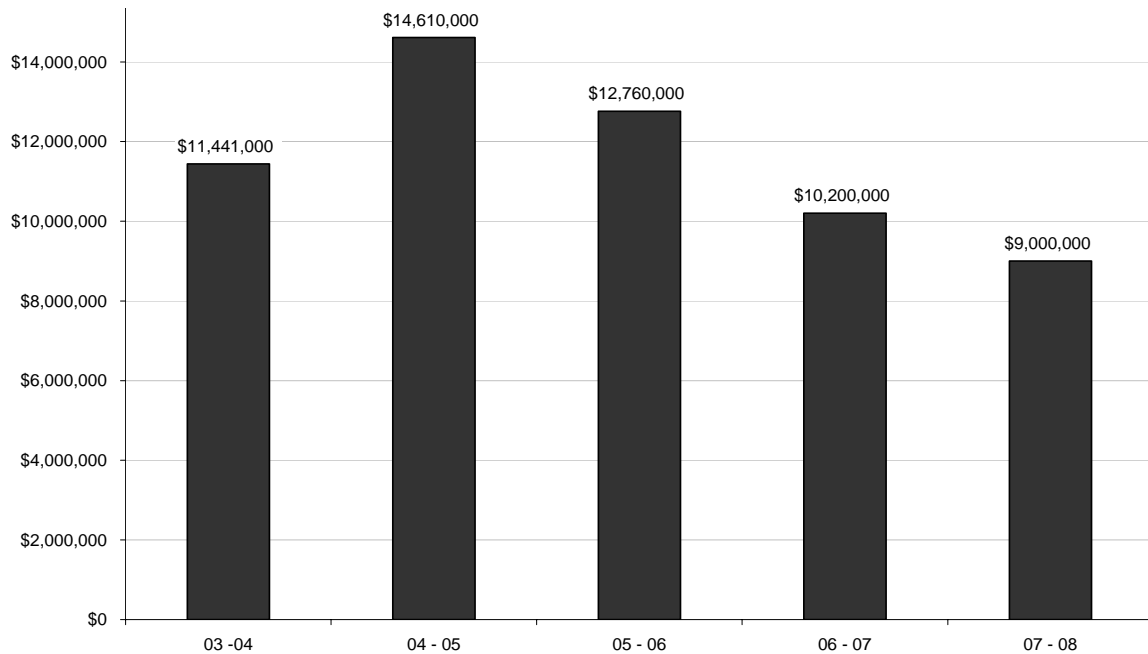
The State of New Jersey allocated \$9 million to the State Division of Travel and Tourism in 2008. New Jersey's \$9 million state tourism budget was the 16<sup>th</sup> smallest state tourism budget in the country. In 2007-8, the average state tourism office budget allocation in the United States was \$17.4 million. States with tourism budgets comparable to New Jersey included Mississippi and Maine. Figure 11 details the tourism budgets for the fifty states during 2007-8.

**Figure 11: 2007-2008 State Tourism Office Budget**



Source: Travel Industry Association, ERA | AECOM

New Jersey's tourism budget has decreased every year since 2004. The State Division of Travel and Tourism is funded annually by legislative appropriation, and the hotel occupancy fee serves as the funding source for the state tourism budget. The 2008 allocation represents the lowest permissible tourism allocation; if the state allocates less than \$9 million to the State Division of Travel and Tourism then the occupancy fee is repealed.

**Figure 12: New Jersey State Tourism Budget Trends**

New York and Pennsylvania represent New Jersey's two largest state competitors for tourists. Situated between the two states, Northern New Jersey is frequently seen by visitors as a pass-through state for people on their travels between Philadelphia and New York City. In spite of the considerable competition from its neighboring states, New Jersey's state tourism budget remains smaller than the state tourism budgets for Pennsylvania and New York. In 2008, the state tourism office budget was \$16 million in New York and \$31.8 million in Pennsylvania, as compared to \$9 million in New Jersey.

ERA believes that the lack of a competitive state tourism budget impacts the areas outside the established visitor destinations disproportionately hard. While areas like Atlantic City have strong marketing programs through the casinos, and the Jersey Shore has decades of tradition going for it, less established destinations rely on the state more for underpinning their tourism activities. These less well known destinations are also likely to benefit more from increased state marketing and promotion.

**Figure 13: 2007-2008 Projected State Tourism Office Budget**

<b>Region</b>	<b>07-08 Allocation</b>	<b>Rank</b>
Pennsylvania	\$31,840,000	6
Virginia	\$18,499,923	15
New York	\$16,000,000	18
Massachusetts	\$11,765,000	26
<b>New Jersey</b>	<b>\$9,000,000</b>	<b>34</b>
Connecticut	\$7,101,614	40
Average State Allocation	\$17,375,943	

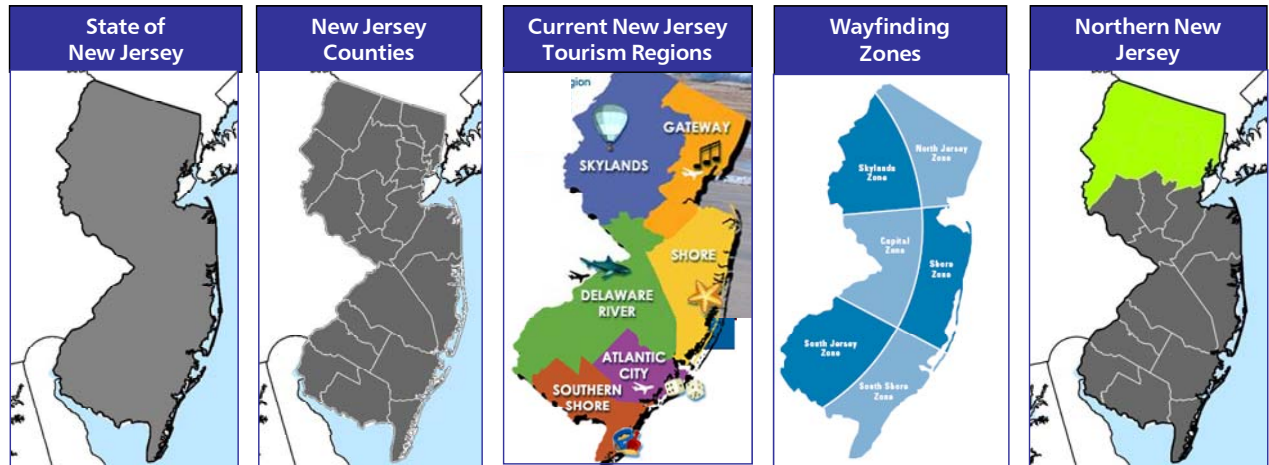
Source: Travel Industry Association, ERA AECOM

## **1.2 Realign State tourism regions to reflect northern New Jersey as a tourism region**

The eight counties of northern New Jersey considered in this Master Plan lie within multiple regional designations, many of which have fallen out of use. The various regional designations represent state and county boundaries and strategic initiatives that have varied over time. The current system is confusing and counterproductive. The various regional designations that are used to identify tourism regions in New Jersey are defined below and in Figure 14.

As described in Section 2 of this Action Plan, State Initiatives, northern New Jersey should continue the regional coordination begun as a part of this Creative Communities process to support, facilitate and coordinate tourism activities in the northern half of the state.

**Figure 14: New Jersey Tourism Jurisdictions**



- State of New Jersey – The State of New Jersey is a tourism region in and of itself. Stakeholder feedback indicated that the state needs to establish an identifiable brand with which tourists can associate. Presently, areas within New Jersey, such as the Shore and Atlantic City, are perceived as tourist destinations for different sorts of vacations. However, there is not an effective state-wide tourism identity; such as I Love NY or Virginia is for Lovers.
- Counties – New Jersey counties play an important role in tourism promotion as DMO boundaries frequently coincide with county lines. Where DMOs do not exist, County Chambers of Commerce and other county entities promote local tourism sites, albeit with extremely limited financial resources. Within the eight-county area, there are only four counties that are fully represented by DMOs: Sussex, Warren, Morris and Hudson Counties.
- Current New Jersey Tourism Regions – The State Division of Travel and Tourism promotional materials divide the state into six regional tourism regions. Over time, the regions have lost their functional value and are used only to present subareas of the state in a geographically balanced way. The tourism regions of New Jersey were designated in 1979 and reflect the state’s marketing strategy at that time. In the 1980s, tourism was funded by the state and was allocated to tourism regions. Today funding is directed to DMOs, which frequently share county boundaries. These state tourism regions no longer receive funding or administrative assistance from the state.

The six tourism regions are: Gateway (Passaic, Bergen, Essex, Hudson, Union, Middlesex Counties); Skylands (Sussex, Warren, Morris, Hunterdon and Somerset Counties); Shore (Monmouth and Ocean Counties); Delaware River (Mercer, Burlington, Camden, Gloucester and Salem Counties); and

Greater Atlantic City (Atlantic County); Southern Shore (Cumberland and Cape May Counties). The eight-county area is partially located within the Skylands region in the northwest and partially located within the Gateway region in the northeast. However, the eight-county area is smaller than the combined area of the Gateway and Skylands regions.

- Wayfinding Zones – The 2009 New Jersey Wayfinding Plan provides the state with an assessment and recommendations for a coordinated system of signage with consistent rules for words, colors, symbols, paper maps and electronic forms. In creating the zones, the plan recommends an easy-to-remember map with six regions that correspond conceptually but not exactly to political or other functional boundaries. The eight-county area falls within two of the wayfinding zones: Skylands Zone and North Jersey Zone. Rather than split the North Jersey region into two tourism districts, as proposed in the Wayfinding Master Plan, the Creative Community Master Plan endorses creating a unified North Jersey tourism region that encompasses all of the counties in northern New Jersey.

The Wayfinding Master Plan has not been adopted by the State Division of Tourism or by counties and municipalities, some of which are moving ahead now with their own, local wayfinding initiatives. Additionally, funding for the implementation of the Wayfinding Master Plan has not been secured. The Wayfinding Master Plan was prepared by Celebrate NJ!, a non-profit dedicated to promoting tourism within New Jersey, with input from key state agencies, including NJ Department of Transportation, ArtPride NJ, NJ Chamber of Commerce, NJ Department of Cultural Affairs, NJ Department of Environmental Protection, NJ Heritage Tourism Taskforce, NJ History Advocates, NJ Municipal Land Use Center, NJ Secretary of State, NJ Transit and the NJ State Legislature.

- Northern New Jersey– The eight-county area of northern New Jersey is comprised of the northernmost counties in the state. The eight-county region has been the focus of the Creative Community Master Plan, however the northern New Jersey region can expand beyond these eight counties to include other northern counties in the state. There are several compelling reasons for creating a unified tourism district for the entire northern New Jersey region:
  - Northern New Jersey represents a natural geographic zone that pulls together the northern area of the state
  - Northern New Jersey offer a diverse product offering that provides synergic opportunities for packaging and promotion
  - The counties of northern New Jersey have a strong orientation toward the New York City market
  - The eight counties in northern New Jersey that have participated in the WIRED project over the last 18 months have established a strong working relationship that will be formalized under the plan

- The northern New Jersey counties are prepared to move forward immediately in the implementation of the plan

### **1.3 Create a dedicated funding source for DMOs**

This master plan recommends that the State of New Jersey establish a revenue source that is dedicated to funding DMOs in the state. Currently, funding for DMOs is provided by the Division of Travel and Tourism via an annual legislative appropriation. In 2008, six Destination Marketing Organizations in northern New Jersey were funded by the Division of Travel and Tourism (Greater Newark CVB, Hudson County Division of Cultural and Heritage Affairs, Meadowlands Liberty CVB, Morris County Visitors Center, Sussex County Chamber of Commerce and Warren County Regional Convention and Visitor's Bureau). Funding levels for the Division of Travel and Tourism are different each year and have declined every year for the past four years. While the Division of Travel and Tourism has committed to continued support for DMOs, the source of the Division's funding has proven to be unstable.

New Jersey should look to funding patterns of DMOs nationally when searching for sources for expanding and securing tourism funding. According to the 2007 Destination Marketing Association International survey of 223 DMO's, the average annual DMO revenue was \$4.8 million, which excludes the revenues of Las Vegas's DMO. As a comparison, the DMOs in northern New Jersey had annual budgets of between \$25,000 and \$450,000 dollars in 2008. According to the Destination Marketing Association International 2007 Profile of a DMO, the four largest sources of revenue for DMOs are hotel occupancy fees, car rental taxes, restaurant taxes, and membership base. New Jersey should reallocate or expand its occupancy fee collections in order to create a dedicated funding source for the state's DMOs.

#### ***New Jersey Hotel Occupancy Fee***

In 2003, the State of New Jersey enacted its first hotel occupancy fee. Today, the occupancy fees are collected on the state and municipal level; the state occupancy fee is 5 percent and some cities choose to levy an additional occupancy fee of up to 3 percent. In New Jersey, all hotel occupancy fees, including municipal occupancy fees, are collected and redistributed by the state.

The New Jersey State Division of Travel and Tourism is funded by the hotel and motel occupancy fee, which generated \$90 million in revenues in 2008. However, only ten percent of the occupancy fees collected by the state in 2008 directly funded tourism. The majority of the revenues from the occupancy fee (60 percent) were distributed into the state general fund.

According to two recent national tourism studies, DMOs in the state of New Jersey receive a disproportionately low share of the hotel occupancy fee.

- *US Travel Association Economic Impacts Fast Facts (1998)* – This study of tourism taxes conducted by the US Travel Association found that every major travel destination in the U.S. (most often a city) levies some kind of hotel tax, and in every case at least some of that revenue goes into the administrative jurisdiction’s general fund. However, many jurisdictions reinvest hotel tax revenue into tourism development and promotion, such as convention centers, cultural programs, welcome centers and travel-related marketing. On average, cities reinvested 37 percent hotel tax revenue in travel and tourism. Cities that reinvested the greatest share of their hotel tax back into travel and tourism included Reno (77.8%), Houston (67.6%), Riverside (60.0%), San Francisco (60.0%), Las Vegas (59.8%), Dallas (57.7%), Detroit (57.1%), San Antonio (54.7%), Indianapolis (54.6%), St. Louis (51.4%), and Austin (50.0%).
- *Destination Marketing Association International (DMAI) 2007 Profile of a DMO* – This DMAI study surveyed 223 DMOs from across the United States in order to understand trends in organizational structure and funding of DMOs. The study found that 86 percent of the DMOs surveyed received funding from hotel occupancy tax revenue. DMOs typically received approximately 53 percent of the hotel occupancy tax collected. The average total revenue of the 223 surveyed DMOs was \$4.8 million, which excludes the revenues of Las Vegas’s DMO.

The majority (60 percent) of the total state hotel fee in New Jersey is allocated to the general fund, and only 10 percent of the revenues in 2007 directly funded tourism, although the remaining 30 percent was allocated to associated uses that also benefit tourists, such as arts, culture and history. Figure 15 details the most recent distribution of the hotel occupancy fee in New Jersey.

**Figure 15: New Jersey Hotel Occupancy Fee 2009 Allocation**

	<b>2009 Allocation</b>	<b>Share of Total</b>
2009 Projected NJ State Hotel and Motel Occupancy Fee Revenues	\$90,000,000	100%
State of New Jersey General Fund Allocation	\$54,000,000	60%
Arts, History & Tourism Allocation	\$36,000,000	40%
<i>NJ State Council on the Arts</i>	\$22,680,000	25%
<i>NJ Dept of State Division of Travel and Tourism</i>	\$9,000,000	10%
<i>NJ Historical Commission</i>	\$3,840,000	4%
<i>NJ Cultural Trust</i>	\$500,000	1%

Source: State of New Jersey, ERA | AECOM

### ***Funding Proposal***

This master plan recommends that the state of New Jersey create a dedicated source of funding for the state's DMO. There are several approaches by which this dedicated funding could be achieved. One approach would be a reallocation of an existing funding stream such as the current state occupancy tax. However, reallocation of occupancy tax dollars would need to preserve funding for the arts and historical commission, both of which are important components of the state's tourism offering, in order to maximize the economic and fiscal impacts that will come with plan implementation. Another approach would be for the state to create a new funding stream such as through the authorization for counties to levy a separate county hotel fee earmarked for DMO's within the county. Other public – private partnership mechanisms could also be considered. Regardless of funding source, the goal of this recommendation is to provide a dedicated annual funding stream to the DMO's without harming other elements of the tourism industry.

At present, there is not a county-level occupancy fee in New Jersey, and 60 percent of the state occupancy fee goes to the state's general fund. Redistributing the state occupancy fee or levying a county-level occupancy fee to fund DMOs creates a dedicated and equitable source of tourism funding. This plan focuses on hotel occupancy fees because this mechanism taxes hotel-visitors, who are primarily tourists, for the benefit of tourism promotion and development. In the case of the county occupancy fee, the counties with the highest hotel occupancy receive the most tourism funding.

In March 2009, New Jersey's tourism lobbied the legislature to increase funding for the sixteen destination marketing organizations in the state to \$8 million for fiscal year 2010. The requested budget represents a 6.6-time increase above the \$1.2 million allocated to DMO funding in 2008. While this proposed funding increase represents a significant gain for New Jersey DMOs, the state's DMOs would remain underfunded compared to DMOs in the United States. The 2007 DMO Organizational & Financial Profile reports that the average total revenue of 573 surveyed DMOs throughout the United States was \$4.8 million, which excludes the revenues of Las Vegas's DMO.

In 2008, the Northern New Jersey counties generated \$56.1 million in state and municipal occupancy fees, which represented 46 percent of the occupancy fee revenues collected in 2008 (Figure 16). One of the funding proposals advocated in this plan involves adding a 1 percent county-level occupancy fee to the existing state and municipal occupancy fees. The following section considers occupancy fee rates in surrounding states, analyzes the appropriate level for a county occupancy fee, and addresses potential challenges for distributing revenues from a county occupancy fee to DMOs.

**Figure 16: Hotel Occupancy Fee Revenues by County, 2008**

<b>Area</b>	<b>State</b>		<b>Municipal</b>		<b>Total</b>	<b>Share of Total</b>
Bergen	\$	11,824,197	\$	7,088,027	\$ 18,912,224	15%
Essex	\$	4,202,593	\$	1,848,658	\$ 6,051,250	5%
Morris	\$	8,238,409	\$	4,867,911	\$ 13,106,319	11%
Hudson	\$	6,392,572	\$	3,369,579	\$ 9,762,152	8%
Union	\$	2,437,124	\$	2,688,552	\$ 5,125,676	4%
Passaic	\$	1,162,393	\$	667,045	\$ 1,829,438	1%
Sussex	\$	710,543	\$	391,560	\$ 1,102,103	1%
<u>Warren</u>	\$	<u>168,349</u>	\$	<u>88,543</u>	\$ <u>256,892</u>	<u>0%</u>
<b>Region Total</b>	<b>\$</b>	<b>35,136,180</b>	<b>\$</b>	<b>21,009,874</b>	<b>\$ 56,146,054</b>	<b>46%</b>
Statewide Total	\$	81,582,209	\$	41,501,558	\$ 123,083,768	100%

Source: NJ Department of Treasury; ERA | AECOM

Prior to levying a new hotel occupancy fee, it is important to evaluate the hotel occupancy fees in the two states with which New Jersey competes most intensely: Pennsylvania and New York. Figure 17 compares taxes and occupancy fees levied in Philadelphia, New York City, Newark, and across Jersey City, and applies each region's hotel taxes to an example \$100 room night. Occupancy fees in northern New Jersey are equal to or less than occupancy fees in Philadelphia and New York City.

**Figure 17: Occupancy Fee Comparisons: New York City, Philadelphia, and North Jersey**

Philadelphia	Rate	New York City	Rate
<b>Sales Tax</b>		<b>Sales Tax</b>	
State	6%	New York State	4.0%
Philadelphia Sales Tax	1%	Metropolitan Commuter Transportation District surcharge	0.375%
Total Sales Tax	7%	<u>New York City</u>	<u>4.5%</u>
		Total Sales Tax	8.875%
<b>Hotel Fee</b>		<b>Hotel Fee</b>	
State Hotel Occupancy Tax	6%	New York City Hotel Room Occupancy Tax	\$2.00 per day +
Philadelphia County Hotel Occupancy Tax	1%		5.875% of the rent
<u>Philadelphia Hotel Occupancy Tax</u>	<u>1.2%</u>		
Total Hotel Occupancy Fee	8.2%		

Example Room Charge -- Philadelphia	
Total Room Charge*	\$100
Sales Tax	\$7.00
<u>Hotel Fee</u>	<u>\$8.20</u>
Room Charge with Tax	\$115.20

Source: Pennsylvania Department of Revenue

Example Room Charge -- NYC	
Total Room Charge*	\$100
Sales Tax	\$8.88
<u>Hotel Fee</u>	<u>\$7.88</u>
Room Charge with Tax	\$116.75

Source: New York City Finance

Jersey City	Rate	Northern New Jersey*	Rate
<b>Sales Tax</b>		<b>Sales Tax</b>	
State Sales Tax	7%	State Sales Tax	7%
<i>Tax within an UEZ section of Jersey City</i>	3.5%	<i>Tax within an UEZ</i>	3.5%
Max Jersey City Sales Tax	7%	Max Jersey City Sales Tax	7%
<b>Hotel Fee</b>		<b>Hotel Fee</b>	
State Occupancy Fee	1%	State Occupancy Fee	5%
<u>Jersey City Hotel Tax</u>	<u>6%</u>	<u>Municipal Occupancy Fee</u>	<u>3%</u>
Total Hotel Occupancy Fee	7%	Total Hotel Occupancy Fee	8%

Example Room Charge -- Jersey City	
Total Room Charge*	\$100
Max Sales Tax	\$7.00
<u>Hotel Fee</u>	<u>\$7.00</u>
Room Charge with Tax	\$114.00

Source: New Jersey Department of Treasury

Example Room Charge -- Northern New Jersey	
Total Room Charge*	\$100
Max Sales Tax	\$7.00
<u>Hotel Fee</u>	<u>\$8.00</u>
Room Charge with Tax	\$115.00

Source: New Jersey Department of Treasury

\* For the purposes of Occupancy Fee comparisons, Northern New Jersey does not include Newark or Jersey City

ERA evaluated several county tax proposals in order to find a tax rate that would accomplish the following two goals:

- Generate a meaningful and dedicated revenue stream for the DMOs in Northern New Jersey

- Keep the occupancy fee in Northern New Jersey in line with the occupancy fee in Philadelphia and New York City

The goal of the county occupancy tax is to provide a dedicated funding stream to all of the DMOs that serve the northern New Jersey region. The funding stream should be large enough to fully fund DMOs in each county, including those with low levels of hotel revenues. Figure 18 shows that an annual county occupancy fee of 1 percent could net an additional \$15 million in occupancy fee revenues throughout the state, and approximately \$7 million in revenues in northern New Jersey. Revenues from the county occupancy fee should be allocated to the following uses:

- County receives share required for administrative purposes
- Regional Tourism Alliance receives share required for operating expenses (estimated at \$250,000 annually)
- Remainder allocated to DMO(s) in the county

The enabling legislation for the county occupancy fee should stipulate that in order to levy a county occupancy fee, the following two conditions must be met:

- At least 90 percent of all revenues collected must fund Destination Marketing Organization(s) within the county
- Destination Marketing Organizations should be clearly defined to include the following criteria:
  - A DMO is a 501(c)(6) corporation
  - DMO governance includes ex officio participation from the county and major cities, and broader participation from the tourism sector, including representatives from hotels

**Figure 18: Potential County Occupancy Fee Revenues**

<b>County Tax Rate</b>	<b>1.0%</b>
Percent of County Tax Invested in Tourism	100%
<b>Occupancy Fee Revenues</b>	
Bergen County	2,364,000
Essex County	728,000
Morris County	1,635,000
Hudson County	1,201,000
Union County	692,000
Passaic County	227,000
Sussex County	136,000
Warren County	32,000
<b>Northern New Jersey Region County Occupancy Fee Collection</b>	<b>7,015,000</b>
<b>Statewide County Occupancy Fee Collection</b>	<b>15,075,000</b>

A county occupancy fee of 1 percent would make the total room charge (including tax) in northern New Jersey slightly higher than Philadelphia but still lower than New York City. All else remaining equal, if a 1 percent county occupancy tax is levied in New Jersey, then for a hotel room with a rate of \$100 hotel per night, a guest would pay \$115.20 in Philadelphia, \$116 in Northern New Jersey, and \$116.75 in New York City. Figure 19 details potential revenues and total charges associated with levying a county occupancy tax in New Jersey.

**Figure 19: Feasibility Test for County Occupancy Fee in northern New Jersey**

<b>Northern New Jersey</b>	<b>Status Quo (State and Municipal Occupancy Fees)</b>	<b>Status Quo plus County Occupancy Fee</b>
<b><u>Hotel Occupancy Fee</u></b>		
State Occupancy Fee	5%	5%
County Occupancy Fee	0%	1%
<u>Municipal Occupancy Fee</u>	<u>3%</u>	<u>3%</u>
<b>Total Hotel Occupancy Fee</b>	<b>8%</b>	<b>9.0%</b>
<b><u>Revenues</u></b>		
State Occupancy Fee Revenues	\$35,136,180	\$35,136,180
County Occupancy Fee Revenues	\$0	\$7,015,000
<u>Municipal Occupancy Fee Revenues</u>	<u>\$21,009,874</u>	<u>\$21,009,874</u>
<b>Total</b>	<b>\$56,146,054</b>	<b>\$63,161,054</b>
<b><u>Example Room Charge -- Northern New Jersey</u></b>		
Room Rate	\$100	\$100
Max Sales Tax	\$7.00	\$7.00
<u>Hotel Fee</u>	<u>\$8.00</u>	<u>\$9.00</u>
<b>Total Room Charge</b>	<b>\$115.00</b>	<b>\$116.00</b>

Source: New Jersey Department of Treasury

### **Distributing the County Occupancy Fee**

The county occupancy fee should be allocated to the DMO which represents the county. In the event that more than one DMO is present in the county, then the funds should be allocated based on hotel revenues located within the jurisdictional boundaries of each DMO. In the event that DMO jurisdictions overlap, then the shared occupancy fee revenues should be split evenly between the two DMOs within the overlapping regions.

### **1.4 Strengthen tourism input into infrastructure and development decisions**

Tourists represent a significant user group for state infrastructure, especially roads, bus and rail transit, and airports, and tourist needs should be incorporated into infrastructure expansion decisions. Similarly, tourism attractions and services represent potent catalysts for local economic development. One component of incorporating tourism into infrastructure and development decisions is Tourist Oriented Directional Signage (TODS), which is also advocated in the New Jersey Wayfinding Master Plan. The revamped TODS program calls for a “tiered” signage that directs a person from federal, state, county or local roads to a point of interest.

As another initiative, Newark Liberty International Airport represents a significant opportunity for marketing to and capturing potential tourists. The State should work with the airport to study opportunities for expanding tourism promotion at the airport and offering packaged tourism programs of varying lengths that cater to travelers that pass through or land at the airport.

### **1.5 Create an international marketing consortium**

The State of New Jersey and the Northern New Jersey need to expand their international marketing initiatives. This new international marketing initiative should begin by commissioning the Department of Commerce to conduct its annual study of international tourism for New Jersey. The study costs \$4,000 and is used to prove that international tourism exists in the state. Furthermore, New Jersey should expand its presence at international tourism trade shows such as International Pow Wow and TravelCom, two of the largest international travel promotion conferences.

A critical element of expanding marketing internationally is building scale through partnership. The State should partner with regional entities such as South Jersey, the Atlantic region, and Port Authority of New York and New Jersey, and out-of-state tourism organizations, such as NYC&Company, the New York State Division of Tourism, Pennsylvania Tourism Office and Greater Philadelphia Tourism Marketing, to promote the state and the region internationally.

## **2. Regional Initiatives**

The following initiatives represent actions that should be undertaken on the regional level in order to better support tourism promotion and development within the Northern New Jersey region. For each recommendation, ERA details the implementation agent(s), timeframe and priority. Figure 20 provides a summary of the recommended regional initiatives.

**Figure 20: North Jersey Partners Master Plan for the Creative Community Collaborative-- Regional Initiatives**

	Implementation Responsibility		Timing			Potential Funding
	Primary	Support	ST	MT	LT	
<b>2. REGIONAL INITIATIVES</b>						
<b>2.1 Create the 'North Jersey Tourism Alliance' as a regional tourism organization</b>						County Occupancy Fee
2.11 Draft MOU	DMO's	N Jersey Partners	x			
2.12 Recruit non-DMO members	DMO's	State Tourism	x			
2.13 Obtain operating funds	Alliance	N Jersey Partners	x			
2.14 Hire tourism development specialist (TDS)	Alliance	State Tourism	x			
2.15 Achieve full DMO coverage of region	Alliance	DMO's		x		State Tourism, local government, local donors
<b>2.2 Create a brand identity for the North Jersey region</b>						North Jersey Tourism Alliance, corporate donors, Colleges/Universities
2.21 Create branding and position statements	Alliance	TA Consortium		x		
2.22 Develop logo and promotional materials	Alliance	TA Consortium		x		
2.23 Develop website & expanded technologies	Alliance	TA Consortium		x		
2.24 Initiate PR activities	Alliance	DMO's		x	x	
2.25 Develop regional signage program	Alliance	DMO's, Highway departments		x	x	TEA - 21 grants
<b>2.3 Create Technical Assistance &amp; Training Consortium (TA Consortium)</b>						Colleges/Universities
2.31 Identify an academic lead	N. Jersey Partners			x		
2.32 Inventory local resources and programs	Universities	Alliance		x		
2.33 Conduct needs assessment of tourism industry players	Universities	Alliance		x		
2.34 Coordinate program response	Universities	Alliance		x		
<b>2.4 Create Affinity Groups for special interests, such as Festivals, Heritage Tourism, Agri - Tourism, Eco-Tourism, Community Arts</b>						Sponsors, attractions, groups, foundations, corporations
	Sponsors Attractions Groups	Alliance, TA Consortium		x		

**2.1 Create the 'North Jersey Tourism Alliance' as a regional tourism organization**

- *Implementation agent(s): DMOs, Division of Tourism, North Jersey Partners, Regional tourism organization*
- *Timeframe: Short to Medium Term*
- *Priority: High*

A Northern New Jersey regional tourism organization is vital to establishing tourism identities for Northern New Jersey. This regional organization, the 'North Jersey Tourism Alliance', would serve as an umbrella organization, not a separate DMO. The regional organization could communicate EAR activities

regionally, and schedule and facilitate meetings between DMOs in the region. The regional organization provides scale that is necessary to undertake tourism development activities and support tourism promotion in the North Jersey tourism region. Roles and responsibilities of the new regional tourism organization could include the following:

- Create branding and positioning strategies for the two tourism zones within the Northern New Jersey region
- Coordinate marketing strategies for each tourism zones in the region
- Work with tour operators to create tourism packages that serve the Northern New Jersey region
- Maintain websites for the two tourism zones in the region
- Coordinate technical assistance consortium
- Coordinate internship program
- Oversee regional research
- Represent region at conventions and trade shows
- Coordinate familiarization tours for regional and national travel writers and tours for regional hospitality industry workers to familiarize them with local offerings
- Hospitality training
- Coordinate regional, secret shoppers
- Coordinate travel writers
- Inventory and publish current resources
- Maintain and disseminate regional special events calendar

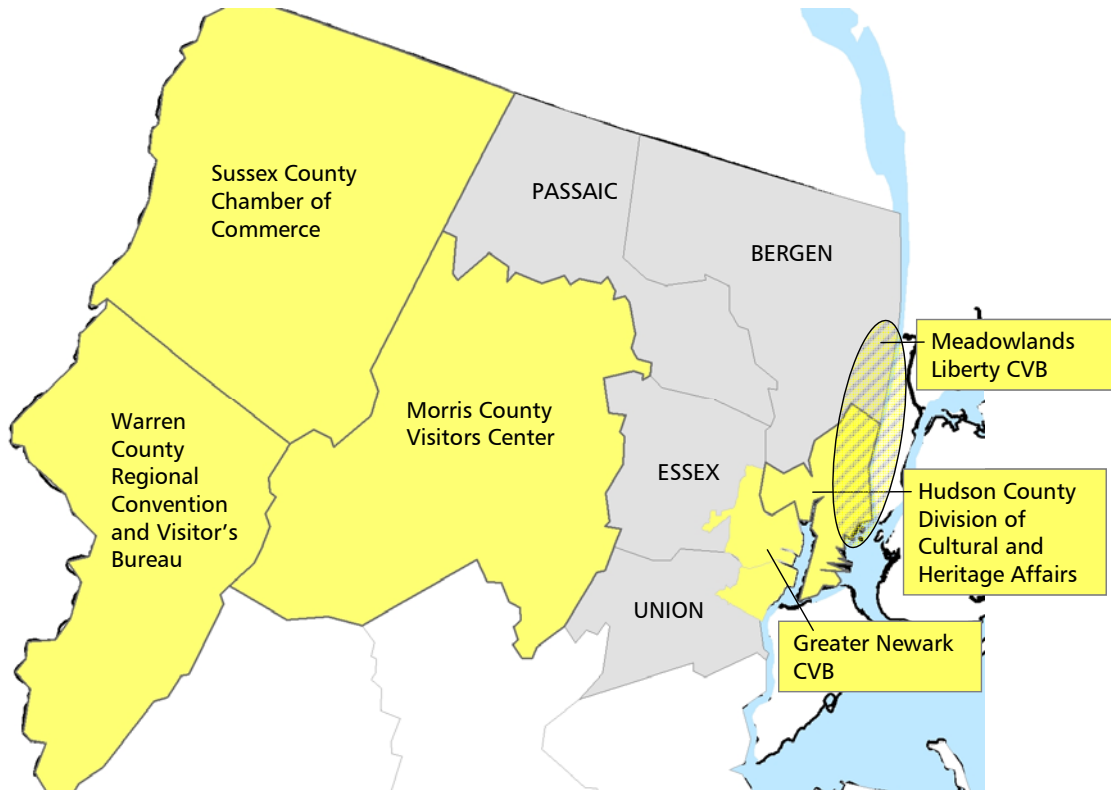
In the short-term, establishing this regional tourism organization will require drafting a memorandum of understanding (MOU) that outlines the roles and responsibilities of the regional organization, funding commitments, and participation commitments from each of the membership organizations. The regional tourism organization should recruit broad regional participation that includes all DMOs in North Jersey, relevant state and regional agencies; Port Authority of New York and New Jersey, NJ Transit, NJ Turnpike, and educational institutions.

In order to function, the regional tourism organization will need a dedicated staff person who ensures ongoing coordination between the tourism entities in the region. This should not be a volunteer-led initiative. The regional tourism organization should be staffed by an experienced tourism development specialist.

Over the long term, the regional tourism organization should strive to achieve complete DMO coverage of the North Jersey region. Figure 21 illustrates the regions of North Jersey that were represented by a DMO recognized by the Division of Travel and Tourism in 2009. Four of the counties in the region have

complete DMO coverage: Sussex, Warren, Morris and Hudson. Essex, Bergen and Union Counties have partial coverage through the Greater Newark CVB and Meadowlands Liberty CVB. Passaic County has no DMO representation.

**Figure 21: DMO Coverage in the North Jersey Region**



**Budget**

ERA estimates that a regional tourism organization would require \$150,000 to start-up, and another \$250,000 for annual operating expenses. The budget assumes that office space will be provided by a public agency, private company, or destination marketing organization in the region. The breakdown of start-up and annual expenses is detailed in Figure 22.

**Figure 22: North Jersey Tourism Alliance Budget**

<b>Expense Category</b>	<b>Cost</b>
<b><u>Start-Up</u></b>	
Consultant Assistance	\$100,000
Organizational expenses	\$10,000
Website Development	\$30,000
<u>Other creative</u>	<u>\$10,000</u>
<b>Total</b>	<b>\$150,000</b>
<b><u>Annual</u></b>	
Projects and Initiatives	\$100,000
Tourism Coordinator	\$78,000
Admin Assistant (PT)	\$24,000
Travel expenses	\$12,000
Supplies	\$6,000
Meetings	\$12,000
Website	\$5,000
Lobbying	\$6,000
<u>Misc</u>	<u>\$7,000</u>
<b>Total</b>	<b>\$250,000</b>

Funding for the regional tourism organization might come from a number of sources. Key considerations are 1) not placing the regional organization in a position that it would compete for funds with the DMO's and 2) to the extent practicable, the source(s) of funding would be stable/protected, and not subject to year to year uncertainty.

**Funding**

Based on the considerations above, ERA recommends that funding for the North Jersey Tourism Alliance come from the occupancy tax (county or state). If five percent of the proposed county hotel occupancy fee collections were set aside for the North Jersey Tourism Alliance, \$350,000 would be generated annually for the Tourism Alliance.

**2.2 Establish the North Jersey regional brand**

- *Implementation agent(s): Regional tourism organization (Primary); Technical Assistance Consortium, DMOs (Support)*
- *Timeframe: Medium to Long Term*
- *Priority: High*

Northern New Jersey should develop a strong brand identity for the North Jersey region, which includes the eight counties considered in this master plan plus any other northern New Jersey counties that wish to join the region. A brand identity for the North Jersey region will bolster economic development efforts and

present the region more cohesively to outside markets. The brand is not merely a name or logo. The name and image of the product should embody a clearly defined concept. The brand must be clearly understood by internal consumers (employees, residents, business owners) and external customers (potential visitors, current visitors, potential businesses, etc.).

A positioning statement is the way in which the regional government, attractions, accommodations and others want consumers (internal and external) to view the region. Having a clear understanding of what is implied by the brand and the purpose of the branding efforts will help to get buy-in from area residents and businesses, which will further the brand's reach. If local businesses understand what the brand is and who the positioning statement is seeking to attract, they can piggyback on the concept and their sales and marketing efforts can help further the brand. The branding and positioning statement should be succinct, easy to understand, believable, and benefit-oriented. As part of the regional branding initiative, the region should adopt a logo that convey the desired image of the region.

As part of the web-strategy for the region, the regional tourism organization can set up a website template for DMOs in the region to use to create county or jurisdictional websites. At present, the websites for the counties and DMOs in Northern New Jersey are all very different. A template would link the various regional EAR entities and help create a unified web presence. Additionally, a website for the North Jersey region should be created that reinforces the regional brand. The website should be commissioned by the North Jersey Tourism Alliance.

In the long term, the North Jersey Tourism Alliance should lead the development of a regional signage program that builds on the branding and logo(s) and enables wayfinding in northern New Jersey.

### **2.3 Create Technical Assistance and Training Consortium (TA Consortium)**

- *Implementation agent(s): North Jersey Partners, Consortium of members of the higher education community (Primary); Regional tourism organization (Support)*
- *Timeframe: Short Term*
- *Priority: High*

A Technical Assistance and Training Consortium could be comprised of organizations in the region that could help DMOs, local businesses, and EAR entities grow and better serve the needs of tourists. The TA Consortium should be led by a consortium of members of the higher education community, which would include faculty and staff from local colleges and universities. The first step in this regional initiative will be to identify the college or university, department, and faculty that will lead the TA Consortium. Colleges and universities that could be included in this consortium are Bergen Community College – Paramus (hospitality management); Hudson County Community College; Montclair State University; Princeton University; Rutgers University and the Heldrich Center for Workforce Development; Essex County

Community College; Morris County Community College; Farleigh Dickinson University (hospitality management); New Jersey Institute of Technology and the NJ Council of County Colleges.

The TA Consortium can provide a variety of services, including capacity building for ethnic neighborhoods; facilitating strategic retail development around transit nodes and downtowns; assisting in the development of tourism packages; and providing pro bono planning assistance to local municipalities. The TA Consortium could also serve special interests, such as working with art galleries to boost attendance through events such as gallery tours and arts festivals. The Consortium could also contribute student or studio help in preparing local development plans that emphasize tourism uses as a key part of a smart-growth network of transit-reinforced existing centers (reinforcing and implementing state land use plans).

#### **2.4 Create Affinity Groups for special interests, such as Festivals, Heritage Tourism, Agri - Tourism, Eco-Tourism, Community Arts**

- *Implementation agent(s): Sponsors, Attractions, Groups (Primary); Regional tourism organization, TA Consortium (Support)*
- *Timeframe: Short Term*
- *Priority: Medium*

In the short term, tourism sponsors, attractions, and the North Jersey Tourism Alliance should work together to create affinity groups that cater to the needs of similarly-themed tourism destinations in the region. Similarly-themed destinations within the North Jersey region include pick-your-own farms, eco-tourism, music festivals, arts festivals, and heritage tourism sites. Affinity groups would enable networking and collaboration between destinations. Members of the affinity groups could identify opportunities for cross-promotion, joint marketing, and packaging tours for different target markets.

### 3. Local Initiatives

The following local initiatives represent actions that should be undertaken on the local level in order to better support tourism promotion and development on the county level and across the northern New Jersey region. For each recommendation, ERA details the implementation agent(s), timeframe and priority. Figure 23 provides a summary of the recommended local initiatives.

**Figure 23: Master Plan for the Creative Community Collaborative-- Local Initiatives**

	Implementation Responsibility		Timing			Potential Funding
	Primary	Support	ST	MT	LT	
<b>3. LOCAL INITIATIVES</b>						
<b>3.1 Strengthen Local Product Offering</b>						
3.11 Increase development of tour packages	Attractions Hotels	DMO's, Alliance, TA Consortium	x	x	x	Attractions, hotels
3.12 Create themed attraction packages	Attractions	DMO's, Alliance	x	x	x	Attractions, DMO's
3.13 Create promotions around high potential products	Attractions	DMO's, Alliance	x	x	x	Attractions, DMO's
3.14 Leverage Hub & Spoke potential of mega attractions	Attractions	DMO's, Alliance	x	x	x	Attractions, DMO's
<b>3.2 Strengthen ethnic neighborhood product</b>						
3.21 Identify candidate neighborhoods	DMO	Alliance	x			Local Community, local government, TA Consortium
3.22 Identify local leadership (BID's community groups)	DMO	Alliance	x			
3.23 Build local capacity (tech assistance)	TA Consortium	Alliance		x		
3.24 Develop local branding (signage & brochures)	Community	TA Consortium		x	x	
<b>3.3 Revitalize visitor centers at Turnpike rest stops</b>						
3.31 Create and install pilot program(s)	Alliance	DMO State Tourism Attractions		x		Corporate donors, Turnpike Authority
3.32 Roll out full program	Alliance	DMO State Tourism Attractions		x		
3.33 Expand to Newark Int'l Airport and Port of Elizabeth	Alliance	PANYNJ			x	PANYNJ
<b>3.4 Facilitate strategic retail development (sports venues, transit nodes, downtowns)</b>						
3.41 Inventory available federal and state programs	TA Consortium	Stakeholders		x		CDBG, SBA, New Markets Tax Credits
3.42 Conduct national best practice survey	TA Consortium	Stakeholders		x		
3.43 Propose new tools as appropriate	TA Consortium	Stakeholders		x		
3.44 Identify priority opportunities	TA Consortium	Stakeholders		x		
<b>3.5 Create North Jersey as "Stay Quarters" for NYC visits program</b>						
3.51 Formalize and execute program	Alliance	Select attractions and hotels; NYC-proximate jurisdictions; Newark Int'l Airport; NJ Transit		x		Attractions and hotels, local government, PANYNJ
<b>3.6 Foster Development of Artist Housing and Support Facilities</b>						
3.61 Inventory available incentives and programs	Alliance	TA Consortium				Tax incentives, foundations, housing funds, rehabilitation/revitalization funds
3.62 Identify candidate opportunities	DMO's	Alliance, Local jurisdictions		x	x	
3.63 Identify/create project developer	Local jurisdictions	DMO's, Alliance		x	x	

### 3.1 Strengthen Local Product Offering

- *Implementation agent(s): Attractions, Hotels (Primary); DMOs, Regional tourism organization, TA Consortium (Support)*
- *Timeframe: Short, Medium, and Long Term*
- *Priority: High*

Although there is an abundance of tourism destinations in northern New Jersey, key tourist sites are not packaged as ready-made vacations. Today, tourists who come to northern New Jersey must be proactive and resourceful by piecing together information from various sources to create a self-manufactured vacation.

The Regional Tourism Alliance should work with New Jersey based and national tour operators to organize themed tourism packages. Tourism packages should appeal to a variety of target markets, including families, seniors and school groups.

It is critical that only group-ready sites are included in the packaged product offerings. Tour packages should not be used to generate attendance for sites that do not have the capacity to accommodate the associated growth in visitors. Poor visitor experience damages the reputation of the site and of the tourism industry in northern New Jersey as a whole. Reversing a damaged reputation is a lengthy and costly process, and one which can be avoided by only including quality tourism products in the tour packages that are created.

There are a multitude of tourism packages that could be marketed in northern New Jersey. The list below provides examples of the types of tours that could be created in the region:

- *Arts Tours* – An arts tour could be anchored by a trip to the museum or other fine arts or performing arts institution, and could include other compatible destinations surrounding the arts institution. For example, a Newark Visual Arts Tour could feature the Newark Museum, Ironbound District, and Downtown Galleries such as Aljira and City Without Walls.
- *Heritage Tourism Tour* – The Crossroads of the American Revolution Association is working to promote tourism related to the American Revolution throughout New Jersey. This planning initiative should expand the definition of heritage to include themes that describe other important periods in New Jersey and US history, such as an Industrial Innovation tour, or a New American tour to Ellis Island.
- *Jersey Fresh Tour* – The Jersey Fresh Tour would plan a day or a weekend on the farms, offering tourists the opportunity to pick fresh produce, experience farm life, take hayrides, wander in crop mazes, etc.

- *Adventure Tourism* – Northern New Jersey offers an abundance of outdoor recreation and outdoor adventure destinations for urban outdoor enthusiasts living in northern New Jersey and the New York City metropolitan area. The regional tourism organization should work with tour operators such as Dynamic Outdoors and Adventure Society in order to bring more adventure-seeking tourists to the spectacular outdoor destinations of northern New Jersey.
- *Festival-based tourism packages* – New Jersey larger festivals, such as the State Fair and the Cherry Blossom Festival, attract tourists for day trips. Creating tour packages that coordinate with major festivals could entice visitors who are already coming to New Jersey for the festival to stay for multiple days.

### **3.2 Strengthen International Neighborhood Product**

- *Implementation agent(s): DMOs, TA Consortium (Primary); Regional tourism organization, (Support)*
- *Timeframe: Short, Medium, and Long Term*
- *Priority: Medium*

Many of the cities of northern New Jersey are dense and diverse, and house immigrant communities from around the world. There are many large and thriving international communities in Northern New Jersey, including Ironbound District, Newark (Portuguese and Brazilian); India Square, Jersey City (Indian); Koreatown, Fort Lee (Korean); South Patterson, (Middle Eastern); Bergenline Avenue, Union City (Cuban); Downtown Hoboken (Italian); Oak Tree Road, Edison (Indian); and Somerville (Thai).

International neighborhoods are one of the most unique product offerings in northern New Jersey. While these communities serve their own communities well, tourists frequently complain that the international neighborhoods are difficult to navigate, hard to find, lack parking, and poorly communicate the stores, restaurants, and other services that are available in the neighborhood.

As part of the strategic master plan, local DMOs and the TA Consortium should work with international communities to expand neighborhood promotion and services that appeal to tourists. In the short term, the TA consortium should identify the candidate neighborhoods that are most equipped to accommodate growth in tourism. DMOs and the TA Consortium should then identify local leaders, such as BID directors and other community leaders, and work with them to analyze opportunities and constraints associated with increasing tourism to the selected neighborhoods.

In the medium term, the TA Consortium should work with local leadership to build local capacity and provide technical assistance. The TA Consortium can work with local leadership to apply for state and local funding and to identify low-cost strategies for making the district more appealing to tourists, such as streetscaping, signage and façade improvements.

In the long-term, the selected international and ethnic neighborhoods should strive to develop local branding (signage & brochures) that identifies the community and also conforms to the specifications of the state wayfinding plan. The TA Consortium should also work with local leadership to create marketing materials (print and on-line) that detail neighborhood offerings, special events, maps and directions.

### **3.3 Revitalize visitor centers at Turnpike rest stops**

- *Implementation agent(s): Regional tourism organization (Primary); DMOs, State Tourism, Attractions, PANYNJ (Support)*
- *Timeframe: Medium to Long Term*
- *Priority: Medium*

New Jersey's visitor centers and rest stops are underutilized resources and could be better used to promote local destinations. For example, the edges of parking lots of rest stops and visitor centers can be used as staging areas for tents or booths that display work of local artists, farm stands, and/or maps to local destinations. This vibrant marketing strategy would draw visitors into the rest stops and visitor centers while promoting surrounding destinations. A pilot promotion program could be tested at the visitor center with greatest visitation rates.

### **3.4 Facilitate strategic retail development (sports venues, transit nodes, downtowns)**

- *Implementation agent(s): TA Consortium (Primary); Stakeholders (Support)*
- *Timeframe: Long Term*
- *Priority: Low*

Retail clusters form around uses that attract large numbers of people on a regular basis, such as downtown office districts, transit nodes, and sports venues. A market analysis should be conducted in areas that are believed to be under-retailed in order to understand the potential for additional retail development. A market analysis can reveal the retail trade area, spending patterns of shoppers in the trade area, competitive retail environment, and the amount of additional retail square footage an area can support. The retail market analysis will also recommend the types of retail stores that would be most successful on a site.

A city will initiate the retail market analyses. For areas that local DMOs consider to be under-retailed from tourist perspective, the DMO should work with the city in order to ensure that tourist spending patterns and demand are considered as part of the market analysis.

### 3.5 Create North Jersey as "Stay Quarters" for NYC visits program

- *Implementation agent(s): Regional tourism organization Primary; Select attractions and hotels; NYC-proximate jurisdictions; Newark International Airport; NJ Transit (Support)*
- *Timeframe: Medium Term*
- *Priority: Medium*

The North Jersey region should be promoted as a "Stay Quarters" for New York City visitors in order to increase occupancy rates in northern New Jersey hotels. The northeastern quadrant of northern New Jersey, and specifically the Meadowlands and the cities of Hoboken, Newark and Jersey City, could launch a formal, branded "stay quarters" initiative. Specific attributes of northern New Jersey that should be promoted to visitors include the proximity to Manhattan, the lower cost of hotel rooms, safety and convenience associated with staying in northern New Jersey. Hotels in the area already promote proximity to New York, however more can be done via a coordinated marketing initiative.

### 3.6 Foster Development of Artist Housing and Support Facilities

- *Implementation agent(s): Region, DMO, Local Jurisdiction (Primary); TA Consortium (Support)*
- *Timeframe: Medium Term*
- *Priority: Low*

Available and affordable housing for artists is essential to building artist communities and arts districts in northern New Jersey. The Regional Tourism Association should work with the Technical Assistance consortium in order to develop a more in-depth understanding of the opportunities and challenges associated with developing artist housing. Among the issues to consider are funding sources, such as inventory the federal, state and local incentive programs that finance the construction of affordable housing. Other issues to consider include best practice artist housing developments across the country.

DMOs can work with local jurisdictions to identify sites for artist housing development. If local jurisdictions choose to write the developer request for proposals for artist housing, and the local DMO can help the local jurisdiction review development proposals and select a developer.

## Estimated benefits to New Jersey of Creative Communities Master Plan

The Master Plan for the Creative Community Collaborative proposes a variety of action items that will, among other things, increase the public resources available for tourism promotion in the state. A new county occupancy fee, which is one mechanism to create a dedicated source of DMO funding, will bring \$15.1 million in new tourism funding to New Jersey. When added to current State Division of Travel and Tourism funding of \$9 million and an estimated \$3.6 million in DMO funding (excluding state DMO grants), the total level of public funding for tourism will increase from \$12.6 million to \$27.7 million, which

represents an increase of 120 percent. Figure 24 illustrates the growth in tourism resources following implementation of the Master Plan. The new county occupancy fee will primarily be distributed to DMOs and will also fund the proposed new Regional Tourism Alliance plus modest administrative costs incurred by the counties to administer the fee.

**Figure 24: Growth in New Jersey Public Tourism Resources Post-Implementation**

	<b>New Jersey Tourism Public Resources</b>
<b><u>Status Quo</u></b>	
State Office of Travel and Tourism Budget FY 2007-08	\$9,000,000
<u>DMO Budget (excluding \$1.2M State DMO Allocation)</u>	<u>\$3,600,000</u>
Total Public Tourism Resources Status Quo	\$12,600,000
<b><u>Post-Implementation</u></b>	
State Office of Travel and Tourism Budget FY 2007-08	\$9,000,000
DMO Budget (excluding \$1.2M State DMO Allocation)	\$3,600,000
<u>County Occupancy Tax</u>	<u>\$15,075,000</u>
Total Public Tourism Resources Post-Implementation	\$27,675,000
<b><i>Percent Increase in NJ Public Tourism Resources</i></b>	<b><i>120%</i></b>

To illustrate the magnitude of benefits associated with implementation of the Creative Community Collaborative Plan and the enactment of the county occupancy fee, ERA has prepared estimates of potential employment and spending impacts. The Creative Community Collaborative Master Plan implementation could add an estimated 16,000 to 24,100 new travel jobs in the New Jersey, with a midpoint estimate of 20,100 jobs. Increased expenditures are estimated to range from \$1.5 billion to \$2.2 billion, with a midpoint estimate of \$1.9 billion.

The economic impact analysis assumes that the county occupancy fee, or other new funding source, is wholly dedicated to tourism spending. The economic impact analysis associated with the Creative Community Collaborative Master Plan begins by looking at the economic benefits associated with tourism spending in the United States. According to the US Travel Association, between 2004 and 2007 every 1 percent increase in state tourism budgets resulted in an average increase of .07 percent in travel employment. For the purposes of this analysis, the national average ratio between spending and job growth is called “average growth”.

Due to the comprehensive nature of the plan, which proposes state, regional, and county-level actions to grow tourism, this analysis assumes that the economic returns associated with plan implementation will most likely exceed national averages. We apply conservative and optimistic premiums of 25 and 50 percent respectively to the average growth rate. The “conservative growth” scenario assumes that tourism

jobs will grow 25 percent more quickly than the US average. In other words, under the conservative growth assumption, for every 1 percent increase in public funding of tourism there will be an increase of .08 percent in travel employment. The “optimistic growth” scenario assumes that tourism jobs will grow 50 percent more quickly than the US average; for every 1 percent increase in state tourism budgets there will be an increase of .10 percent in travel employment.

The analysis assumes that the base level of public tourism resources totals \$12.6 million using 2007 funding figures. This level of funding represents the total budget of the State Division of Travel and Tourism plus the budgets of the funded DMOs in the state. In 2007, the State Division of Travel and Tourism allocated \$1.2 million of its \$9 million budget to twelve funded DMOs, three of which were in northern New Jersey (Morris County Visitor Center, Meadowlands Liberty CVB, and Greater Newark CVB). The State Division of Travel and Tourism DMO fund is a matching grant whereby the state provides 25 percent of the DMO budget and the DMO raises the remaining 75 percent from outside funds.

ERA assumes that the \$1.2 million State Division of Travel and Tourism allocation represents 25 percent of the budget of all of the state’s DMOs. In other words, the total budget for the funded DMOs in New Jersey is \$4.8 million, 25 percent of which comes from the State Division of Travel and Tourism funding and the 75 percent (\$3.6 million) of which is raised through a variety of sources.

Post-implementation, a total of \$27.7 million in public resources will be allocated to tourism (comprised of \$9 million State Division of Travel and Tourism budget; \$3.6 million DMO budget, excluding State funding; and \$15.1 million county occupancy fee revenues. In the post-implementation phase, 120 percent more public resources will be available for tourism promotion in the state.

ERA applied the conservative and optimistic premiums to the projected increase in tourism resources in the post-implementation phase in order to estimate new job creation associated with the implementation of the Creative Community Collaborative Master Plan. Based on these average, conservative and optimistic growth assumptions, the full implementation of the Master Plan for the Creative Community Collaborative could bring an additional 16,000 to 24,100 new travel jobs to the state. Figure 25 details the new jobs associated with the Creative Community Collaborative Master Plan.

**Figure 25: Creative Community Collaborative Master Plan Employment Impacts**

	Average Growth (no premium)	Conservative Growth (25% premium)	Optimistic Growth (50% premium)
<b><u>Assumptions</u></b>			
Percentage Change in State Tourism Budget	1%	1%	1%
Annual Travel Employment Growth per 1% change in Tourism Budget	0.07%	0.08%	0.10%
<b><u>Projected Growth Rate for Travel Budget and Employment</u></b>			
<b><u>Post-Implementation</u></b>			
Percentage Change in Public Tourism Resources	120%	120%	120%
Annual Travel Employment Growth based on change in Tourism Resources	7.95%	9.93%	11.92%
<b><u>NJ Travel Employment</u></b>			
2007 NJ Travel Employment (Thousands)	201.9	201.9	201.9
Projected New Travel Employment Post-Implementation (Thousands)	16.0	20.1	24.1
<b><i>Total Travel Employment Post-Implementation (Thousands)</i></b>	<b><i>217.9</i></b>	<b><i>222.0</i></b>	<b><i>226.0</i></b>

Source: US Travel Association; AECOM

Based on the job growth projections detailed above, ERA estimates a corresponding growth of \$1.5 to \$2.2 billion in tourism spending. Spending growth estimates are based on historic correlation between tourism jobs and tourism spending. In 2007, every tourism job corresponded to \$93,200 in tourism spending. Under the average growth scenario, implementation of the Creative Community Collaborative Master Plan could result in 16,000 new jobs. Assuming that the average tourism expenditure to tourism job ratio remains constant, then the job growth associated with the Master Plan would result in \$1.5 billion in new tourism expenditures. For the conservative growth scenario and optimistic growth scenario, the expenditure estimates would be \$1.9 billion and \$2.2 billion, respectively.

Figure 26 details the new tourism expenditure associated with the Creative Community Collaborative Master Plan.

**Figure 26: Creative Community Collaborative Master Plan Spending Impacts**

	Average Growth	Conservative Growth	Optimistic Growth
2007 Travel Spending in NJ	\$ 18,808,100,000	\$ 18,808,100,000	\$ 18,808,100,000
<u>2007 NJ Travel Employment</u>	<u>201,900</u>	<u>\$ 201,900</u>	<u>\$ 201,900</u>
Average Expenditure/Job	\$ 93,200	\$ 93,200	\$ 93,200
<u>Projected New Travel Employment Post-Implementation</u>	<u>16,000</u>	<u>20,100</u>	<u>24,100</u>
New Tourism Expenditures	\$ 1,491,200,000	\$ 1,873,320,000	\$ 2,246,120,000
Percent Change in Tourism Expenditure	7.9%	10.0%	11.9%

Source: US Travel Association; AECOM

The spending and jobs estimates outlined above provide an order of magnitude estimate of growth in tourism jobs and tourism spending that could result through the full implementation of the Creative Community Collaborative Master Plan. However, it is important to note that tourism spending trends and thus tourism job trends, can vary dramatically from state to state. Additionally, the state tourism budget is only one of several major factors that affect tourism spending. Other factors exogenous to the state tourism budget have significant positive and negative impacts on tourism spending within the state and could affect the spending and jobs estimates outlined in this section.

One of the most important factors in tourism spending is the availability of tourism destinations. States with an abundance of tourism products attract tourists. The states with the highest levels of tourism spending in 2008 were California, Florida and New York. Due to the proximity to New York City, Newark Liberty International Airport, and the multiple tourism destinations in the state, northern New Jersey has historically enjoyed a high level of tourism spending.

Additionally, tourism spending for any given year is correlated largely to weather patterns, economic factors such as unemployment rate, fuel prices, airline prices, etc. The tourism spending and jobs estimates outlined above will change to reflect strength of the economy.

## VI. Case Studies of Regional Tourism Alliances

Profiles of eight regional tourism organizations are presented in order to (1) give examples of best practices in regional tourism promotion and (2) draw lessons learned from previous efforts to brand tourism regionally. The regional tourism organizations selected differ in size, budget, scope of tourism promotion, and degree of autonomy from local DMOs. These case studies provide examples of the types of activities in which a regional tourism organization can engage and the different strategies for splitting tourism promotion initiatives between local DMOs and regional tourism promotion organizations.

Organizations profiled include Kentucky Western Waterways Association, Southern & Eastern Kentucky Tourism Development Association, St. Croix Valley Regional Tourism Alliance (Wisconsin and Minnesota), Petersburg Area Regional Tourism Corporation (Virginia), National Road Heritage Area Corporation (Pennsylvania), Greater Philadelphia Tourism Marketing Corporation (GPTMC), Chicagoland Regional Tourism Development Office and Adirondack Regional Tourism Council.

### **Kentucky Western Waterways Association**

The Kentucky Western Waterways Association is a non-profit, membership organization covering 15 counties around Kentucky Lake, Lake Barkley, and Land between the Lakes. The group's roles include operation of the regional visitor center, publication of the annual visitor guide, maintenance of the website, responding to inquiries, and limited lobbying.

The Association's annual budget of \$300,000 is funded through visitor guide advertising, fundraising (such as dinners and rack placement fees). The Association staff consists of one full-time and two part-time employees.

### **Southern & Eastern Kentucky Tourism Development Association**

A non-profit organization founded under the direction of Congressman Hal Rogers, The Southern & Eastern Kentucky Tourism Development Association (SEKTDA) covers 47 counties organized into 19 corridors.

Initially begun with \$5 million of federal funding, the Association now also receives federal funding through general appropriation "earmarks" and federal grants from the Small Business Administration and other agencies. In 2009, the federal, general appropriation funding totaled approximately \$700,000.

Occasionally, the group receives funding from the state of Kentucky grants. The primary objectives of SEKTDA are raising the visibility of the region and increasing local/regional capacity. The Association's seven employees focus on marketing and promotion, product development, technical assistance, publication of a vacation guide, and a 511 directory partnership.

In addition, groups of volunteers (including representatives from local businesses and other key parties) work to promote tourism and economic development throughout each corridor. Over 300 volunteers participate on a monthly basis as members of these corridor teams.

Each corridor team has developed a work plan for their sub-region that identifies needs and goals related to tourism development. Financing for the selected project is then funded through SEKTDA's Community Development grants

### **St. Croix Valley Regional Tourism Alliance**

The St. Croix Valley Regional Tourism Alliance (SCVRTA) is a bi-state coalition of tourism-related businesses, attractions and promotional groups that promote the region centered on the Lower St. Croix National Scenic River in Wisconsin and Minnesota. The SCVRTA mission includes providing coordinated marketing and promotion of the region and providing its members with other types of training and support. The activities of the group can include: maintenance of a regional website, cooperative advertising campaigns, discounted advertising in major markets, preparation and distribution of a visitor guide, group participation in travel shows and consumer shows, operating booths at both state fairs, sponsorship of FAM tours, sponsorship of educational and training seminars and providing networking opportunities.

The SCVRTA is a membership organization with approximately 100 active members. Members are typically hospitality and tourism businesses, chambers of commerce, CVB's economic development groups. Representatives of the Minnesota and Wisconsin state tourism offices are also members, and they help keep the general membership up to date of state activities and programs.

The organization is led by an executive board of four members, and the activities of the organization are carried out by members on a voluntary basis. There are no paid staff members. Some administrative support is provided by one of the local chambers of commerce. The drawback of the volunteer-driven activities of the group is a lack of consistency both in terms of the initiatives undertaken and the quality of the outcomes. Strong, motivated volunteer leadership can yield strong results; the opposite is also the case.

SCVRTA has access to a number of colleges and have worked with them periodically on specific initiatives, including sponsorship of Education Day. The University of Wisconsin – River Falls, which is located in one of the larger communities, is the most active education institution partner.

The annual operating budget is approximately \$35,000. Of this total, \$25,000 is generated through the sale of advertising in the visitor guide, and \$10,000 is raised through membership dues. (Dues are \$100 for businesses and smaller members, and \$250 for chambers and larger organizations.) Specific initiatives have been funded through grants from the two state tourism offices and the National Park Service.

### **Petersburg Area Regional Tourism Corporation**

The Petersburg Area Regional Tourism Corporation is quasi-public company set up in 2006 to help strengthen tourism in a three-county/three-city area centered on the Civil War Battlefield at Petersburg, Virginia. It was created under the auspices of a regional planning and economic development group – the Crater Planning District Commission. The Commission provides office space and administrative support, but PARTC is governed by its own board of directors which is comprised of representatives of the area’s public and private attractions, hospitality business, and the six participating jurisdictions. Local tourism agencies, local chambers of commerce and the Virginia Tourism Corporation are partners to the corporation.

The PARTC was established to specifically provide stronger marketing support for the area which it does through a number of marketing promotional tools including maintaining a regional website. The second major focus of PARTC is hospitality training. The corporation worked with Virginia State University to develop a program to increase awareness of regional tourism assets among hospitality and tourism business staffs. The program is a 90-minute program with a 35-minute DVD. The program can be presented on-site by the PARTC trainer, or it can be self-administered. The plum for completing the program is free admission to the region’s attractions for a limited period of time following completion. The program has yielded with very positive results.

Funding for the Petersburg Area Regional Tourism Corporation comes from the State of Virginia. In the past, the budget has been in the \$750,000 range. Given the pressures on state government finances, the corporation’s budget was reduced by half for the current year. The budget funds the executive director’s salary and promotional activities, which includes the activities of a PR firm. The other corporation employee, the hospitality trainer, is funding through a community development grant.

### **National Road Heritage Area Corporation**

The National Road Heritage Corporation is the managing entity of one of 12 heritage areas that make up the State of Pennsylvania’s heritage area system. The National Road Heritage Area is located in southwestern Pennsylvania and celebrates the National Road, the first federal public works project. The heritage area covers a 100-mile corridor traversing six counties and numerous towns, cities and other jurisdictions.

The NRHAC functions to complement the activities of the region’s Tourism Promotion Agencies (TPA’s). The TPA’s promote the region’s products; the NRHC helps develop the “community infrastructure” to strengthen local capacity and thus to strengthen local product. The executive director, who is assisted by one administrative assistant, views her role as one of facilitation. The facilitation process involves leveraging government connections to get the right agencies or people involved in solving a problem or meeting a need. For example, when one local jurisdiction wanted to create a gateway, the ED brought in

the right resources from Penn DOT. When a business needed help in putting together a marketing plan, the ED helped make a connection with the small business center at a local college. Another activity is matching funding needs with potential grant programs. NRHA meetings and functions provide networking opportunities.

Funding for the National Road Heritage Area comes primarily through state appropriations for the program as a whole. There is some supplemental funding from grants and fundraising projects. The current NRHA budget is \$125,000 with \$100,000 coming through the heritage area program. Unfortunately, given the financial situation with the State of Pennsylvania, heritage area funding has been zeroed out for the new fiscal year, and the chances for restoring funding are slim.

### **Greater Philadelphia Tourism Marketing Corporation (GPTMC)**

The GPTMC is a private, non-profit organization founded in 1996 that markets regional Philadelphia including Philadelphia and surrounding counties – Bucks, Chester, Delaware, and Montgomery Counties collectively referred to as “Philadelphia and Its Countryside” as a tourism destination. The GPTMC functions as an independent organization, but interfaces heavily with other visitor organizations including each of the county CVBs. The organization has an extensive staff of 45 working in their in-house advertising, public relations, website, research, and cultural tourism departments. The organization has an annual budget ranging from \$10 to \$12 million (expected to be significantly lower this year) with funding from the Philadelphia County hotel tax (39 percent in fiscal year 2008), the Commonwealth of Pennsylvania (40 percent), the Delaware River Port Authority (one percent), and other sources including website commissions and corporate sponsorships (five percent).

GPTMC has the following roles:

- *Media Communications:* GPTMC has an extensive public relations program that produces news content, photography, video, web content, and press kits for various media outlets and travel editors. The organization maintains a 3,200-person media database and generated nearly 3,000 stories in 2003.
- *Advertising:* GPTMC designs and conducts advertising local, regional, and national campaigns to market the region as an overnight destination. In addition, the organization provides supportive funding to regional attractions and cultural initiatives to increase the scope and breadth of their advertising placements.
- *Packaging and Direct Sales:* GPTMC creates and advertises seasonal overnight packages including “Philly Overnight” and “Philly – You Just Can’t Do It In A Day.” In addition, the organization creates event packages for holidays such as New Year’s Eve, Valentine’s Day,

and events at local institutions. The GPTMC website advertises the packages and buyers can buy the package online or call the hotel directly.

- *Gophila.com* – GPTMC is the official website with regional itineraries, information on things to do, a dining and nightlife section, event information, hotel booking options, and a My Trip tool that allows website visitors to click and add destinations seen on the website to their itinerary for easy printing. The website also feeds content to the City of Philadelphia website.
- *Tourism Development Initiatives*: GPTMC on its own and by partnering with other organizations has developed new visitor draws including holiday lighting, the Phlash trolley service, web content including a blog ([uwishunu.com](http://uwishunu.com)), videos, and podcasts, and helping establish CruisePhilly with the Delaware River Port Authority.
- *Partnerships*: GPTMC brings together various organizations to develop promotional programs to reach markets including the five CVBs, AAA, Comcast, Amtrak, Philadelphia Gay Tourism Caucus, [phila.gov](http://phila.gov), the Greater Philadelphia Cultural Alliance, Center City District, and the Knowledge Industry Partnership.
- *Research*: GPTMC conducts intensive quantitative and qualitative research including the tracking of detailed visitor data patterns and trends, focus groups, and economic impact analyses.
- *Stakeholder Relations*: GPTMC communicates with the local area through an email newsletter and interfacing with political, cultural, hospitality, and civic leaders.

### **Chicagoland Regional Tourism Development Office**

The Chicagoland Regional Tourism Development Office, also referred to as Chicago Plus, is a non-profit organization that serves as a regional leisure marketing organization. Chicago Plus has one staff member that runs the organization and a board of directors consisting of the seventeen CVBs in the Chicagoland region; two CVBs represent Chicago and the remainder represents fifteen surrounding suburbs. Chicago Plus has an annual budget of approximately \$200,000, used for marketing and other purposes that are directed and decided by the board. Chicago Plus funding mostly comes from the Illinois Bureau of Tourism, which directs money to Chicago Plus and regions unrepresented by local CVBs.

Chicago Plus has the following roles:

- *Website:* The organization runs [www.visitchicagoland.com](http://www.visitchicagoland.com), which describes attractions, itineraries, packages, and displays their Twitter feed with promotions. The website also serves as a travel booking portal.
- *Marketing:* Chicago Plus runs mostly print advertising campaigns with its budget and cooperatively advertises with the local CVBs. The organization funds larger, more expensive advertising campaigns through fees from each of the CVBs. Overall, the advertising has a leisure focus and strives to cover the region in its entirety.

### **Adirondack Regional Tourism Council**

In New York State, the State Division of Tourism has designated eleven vacation regions that encompass the entire state. Each regional organization is made up of the counties located within the region. Each county is represented by a county Tourism Promotion Agency (TPA), which is typically a CVB or Chamber of Commerce. The Adirondack Regional Tourism Council is one of the eleven official vacation regions and is made up of eight counties (Clinton, Essex, Franklin, Hamilton, Herkimer, Lewis, St. Lawrence, and Warren). The Adirondack region includes the 6 million acre Adirondack Park and small town centers including Plattsburgh. The ARTC has two staff and receives funds from each county that are matched by state grants.

The ARTC has the following roles:

- *Website:* The ARTC runs [visitadirondacks.com](http://visitadirondacks.com) which describes attractions, lodging, directions, and also provides a trip planner.
- *Advertising/Promotion:* The organization funds advertising campaigns using an outsourced advertising agency and also takes on “collateral fulfillment” to distribute printed pieces.
- *Visitor Assistance:* The ARTC answers visitor inquiries through phone.

### **General Conclusions**

Based on our survey of regional organizations, the following general conclusions are presented:

- Most regional tourism organizations are involved in marketing and promotion for regions that have marketable identities.
- For a number of organizations, capacity building activities were also important, and just the presence of a regional structure facilitates networking and cooperative thinking.

- Partnerships were important aspects of regional organizations success. Partnerships covered a wide range of participants including local tourism promotional groups, local colleges as well as state travel offices
- Public funding was the most common source of financial support of regional organization activities
- It is common for office space and administrative support to be provided by one local partner/member

## Appendices

## A. Advisory and Stakeholder Committee Members

Figure 27: Northern New Jersey Partners Advisory Committee

Last	First	Organization/Company	Title
Bensley	Leslie	Morris County Visitors Center	Executive Director
Bradford	Leonie	Newark Alliance	Program Officer
Dehaan	Neil	Essex County College	Director of Grants
Fuller	Barbara	Union County Office of Cultural and Heritage Affairs	Administrator
Galgano	Greer	Workforce Investment Board	Assistant to Executive Director
Goldman	Ben	City Without Walls	Executive Director
Goltz	Robert	Warren County Regional Convention and Visitor's Bureau	Director
Haas	Gordon	Greater Elizabeth Chamber of Commerce	CEO
Hallock	Chip	Newark Regional Business Partnership	President & CEO
Iannitelli	Giulia	Skylands of New Jersey Tourism Council	Director
LaRosa	Bill	Hudson County	Director of Cultural Affairs & Tourism
Li-Chun, Ph.d	Lin	Montclair State University	Associate Professor, Coordinator
Lombardi	Craig	Economic Development Corporation of Essex County	Director
Mitchell	Tanya	Newark Alliance	Chief Financial Officer
Molinelli	Tammy	Workforce Investment Board	Executive Director
Norman	Jeff	NJ Performing Arts Center (NJPAC)	VP Public Affairs
Oppenheimer	F. Phyllis	NJ Department of State Division of Travel and Tourism	Tourism Representative
Ortiz	Hector	Greater Newark Convention & Visitors Bureau	Director
Provost	Bob	The Star-Ledger	Director of Marketing
Ross	Judy	Meadowlands Liberty CVB	Director
Tyrrell Ph. D.	Brian J.	Richard Stockton College	Interim Director
Vazquez	Leonardo	Rutgers University Professional Development Institute	Program Director

**Figure 28: Northern New Jersey Partners Stakeholder Committee**

Last	First	Organization/Company	Title
Albin	Mark	Newark Museum	Deputy Director of Marketing and PR
Austin	Dennis	Warren County Cultural/Arts Commission	Warren County Arts Coordinator
Austin, PhD	William	Warren County Community College	President
Baragona	Rita	Blair Academy	Visual Arts Instructor
Bell Coleman	Barbara	Branch Brook Park Alliance	Co-Chair
Boisson	Catrina	NJ Performing Arts Center (NJPAC)	Vice President of Marketing
Bowlby	Debra	Warren County Chamber of Commerce	PinPoint Graphics
Brown	Doug	Rahway Valley Jerseyaires	Quartet Singer/Leader
Capiello	Lawerence	Arts Guild of Rahway	Executive Director
Cays	John	NJIT	Associate Dean for Academics
Chirchick	Alora	Paper Mill Playhouse	Director of Marketing
Clifford	Mark	Centenary College Stage	Audio
Coen	Susan	Rahway Arts District	
Craig	Katherine	Boxwood Hall State Historic Site	
Craig	Vicky	Art in the Atrium	Executive Director
Dallow	Brian	Music for All Seasons	Executive Director
Davson	Victor	Aljira Contemporary Art	Executive Director
Dawkins	Cheryl	Courtyard by Marriott	Director of Sales
Dech	Dave	Warren County Planning	Director
Deen	Shah	Robert Treat Hotel	General Manager
Doyle	Linda	Westfield Symphony Orchestra	Executive Director
Drew-Pack	Donna	Essex County Division of Cultural & Historic Affairs	Director
du Plessis	Philip and Sharon	Liberty Schooner Liberty Landing Marina Union County Open Space, Recreation and Historic	Owners
Durbin Drake	Victoria	Preservation Trust Fund	Director
Engler	Rick	Shakespeare Theatre Company	Director of Marketing
Epps	Linda	NJ Historical Society	Executive Director
Erwin	Sandra	Union County Performing Arts Center	Executive Director
Fallo	Geri	City of Hoboken	Dir of Cultural Affairs
Feder	Lynda	Hanson Park Conservancy	President
Fields	Tim	Country Inn & Suites	Sales Manager
Foster	Robert	Hoboken Historical Museum	Director
Friedman	Eric	Hudson County Community College	Dean
Fruchter	Rena	Music for All Seasons	Artistic Director
Gaba, Ph.D.	Barbara	Union County College	Provost, Elizabeth Campus
Gale	Brian	Prudential Center	Dir of Booking/Mktg
Goldman	Glenn	NJIT	Director, School of Art + Design
Gomide	Gus	NJ Symphony Orchestra (NJSO)	VP of Marketing & External Affairs
Goodman	Christine	Art House Productions Jersey City Fridays	Founder
Grossman	Seth	Ironbound BID (IBID)	Executive Director
Grzesiak	Marion	Visual Arts Center of New Jersey	Executive Director
Howard	Charlotte	The Montclair Art Museum	Dir of Mktg/ Commun
Kakaletris	Kathy	Union County Office of Cultural/Heritage Affairs	Tourism Coordinator
Kelly	Audrey	Kean University	Office of the President
Kenny	Kay	Pro Arts Jersey City	President
Kirchdoerffer	Ed	The Community Theatre	Marketing Director
Kirkos	Jim	Meadowlands Chamber of Commerce	President / CEO Union County Board of Chosen
Kowalsi	Betty Jane	Union County	Freeholders
Lewis	John Penn	Park PAC	Exec Dir
Long	Paula	Union County Office of Cultural/Heritage Affairs	Arts Program Coordinator
Longo	Jeff	NJ Devils	VP Marketing
McMillan	Anthony	Newark Downtown District	President & Executive Director NDD
Mithaug	Derek	Judith Wharton Music Center	Executive Director
O'Dea	Bill	Elizabeth Development Company	Deputy Director
Oglesby	Linwood	Newark Arts Council	Executive Director
Oliver	Joe	Union County College	Retail Skills Center Manager
Onorevole			
Annett	Linda	New Jersey Youth Symphony	Executive Director

### Northern New Jersey Partners Stakeholder Committee (continued)

Last	First	Organization/Company	Title
Palazzo	Denise	Jersey Gardens Mall	General Manager
Patino	Mauricio	Robert Treat Hotel	General Manager
Pohli	Richard	Traveling Friends	Private Rec Tour Op
Puglisi	Anthony	Essex County Executive's Office	Office of Public Information
Rack	William	Merchants and Drovers Tavern Museum Association	President
Ravens	Rupert	Rupert Ravens Contemporary	
Resker	Bob	Warren County Board of Recreation	Land Preservation Administrator
Riehle	Therese	Elizabeth Residence by Marriott	General Manager
Romanaux	Elizabeth	Liberty Science Center	VP Commun
Rumsey	Dani	Union County PAC	Public Relations Manager
Salvante	Daniel	Essex County Parks	Director
Salzman	Michael	New Works	Principal
Sanicki	Megan	NJ Transit	Snr. Dir. Marketing
Schroh, Jr.	Bill	Liberty Hall Museum Kean University	Director of Operations
Shannon	Nancy	Jersey City Museum	Director of Development
Sharkey	David	Renaissance Hotel- Newark Airport	General Manager
Sharps	Ronald	Montclair State University	Associate Dean for College of the Arts
Silverman	Paul	The Hudson Reporter	Co-Owner
Simon	Amy	New Jersey Arts Incubator	Executive Director
Sommer	John	Centenary College	CFO
Souder	Alysia	Institute of Music for Children	Executive Director
Sparks	Maria		Director
Spina	Mark	Premier Stages at Kean University	Artistic Director
Stell	Crystal		
Sullivan	Scott	South Orange Perf Arts Center (SOPAC)	Director of Marketing
Thomas	Angela	Bergen PAC	Director of Marketing
Thomas	Philip	Newark Symphony Hall	Executive Director
Thomas	Anita	Carolyn Dorfman Dance Company	Executive Director
Tinen	Maureen	Union County Economic Development (UCEDC)	President
Tinley	Eloise	Historical Society of Plainfield / Drake House Museum	President
Unger	David	The Hudson Reporter	Publisher
Wallnau	Carl	Centenary College Stage	DirCentenaryCStage Co
Wanko	Deborah	Courtyard by Marriott	Senior Sales Manager
Washington	Ethel	Union County Office of Cultural / Heritage Affairs	History Programs Coordinator
Whiten	Jon	Jersey City Independent	Managing Editor
Wilson	Baye	Lincoln Park Coast Cultural District	Executive Director
Wroe	David	Westfield Symphony Orchestra	Music Director
Wylie	Sheelagh	Xanadu Meadowlands	Dir Tourism/Groups
Zapcic	Andrea	Rahway Arts District	
Zdenek	Robert	Robert Zdenek Associates	Principal
Zeitlinger	Ron	Jersey Journal	
Zuber	Ronald	Union County Open Space, Recreation and Historic Preservation Trust Fund	

## **B. Inventory**

The inventory is organized first by EAR sector, with each sector on page of its own, and next by county. For each attraction, ERA has listed the attraction's name, city, county, whether or not it has a website, seasonality, and pricing. The inventory list also identifies key attractions, which indicate strategic attractions that have greater drawing power and could potentially anchor the plan. The key attractions were identified through interviews with leaders of Destination Marketing Organizations in the eight-county region.



## Agritourism

Name	City	County	Category	Website	Seasonality				Admission	Key Attraction
					Summer	Spring	Winter	Fall	0 \$ - less than \$10 \$\$ - \$10 to \$25 \$\$\$ - over \$25	
Kimball's Upick Farm	Belvidere	Warren	Farm	o	o		o			
Longmeadow Farm	Hope	Warren	Farm	o			o			
Mackey's Orchards	Belvidere	Warren	Greenhouse	o	o	o	o			o
Mt. Bethel Christmas Tree Farm	Port Murray	Warren	Tree Farm							
Perfect Christmas Tree Farm	Phillipsburg	Warren	Tree Farm	o		o	o			
Villa Milagro Vineyards	Finesville	Warren	Vineyard	o	o	o	o			



## Ecotourism

Name	City	County	Category	Seasonality					Admission	Key Attraction
				Website	Summer	Spring	Winter	Fall	0 \$ - less than \$10 \$\$ - \$10 to \$25 \$\$\$ - over \$25	
Merrill Creek Reservoir	Washington	Warren	Ecological Center	o	o	o	o	o		o

## Visual Arts

Name	City	County	Category	Seasonality					Admission	Key Attraction
				Website	Summer	Spring	Winter	Fall	0 \$ - less than \$10 \$\$ - \$10 to \$25 \$\$\$ - over \$25	
Fairleigh Dickinson University	Teaneck	Bergen	Art Gallery	o	o	o	o	o	0	
The African Art Museum of the S.M.A. Fathers	Tenafly	Bergen	Art Museum	o	o	o	o	o	0	
Aljira, a Center for Contemporary Art	Newark	Essex	Art Gallery	o	o	o	o	o	0	
City Without Walls Gallery	Newark	Essex	Art Gallery	o	o	o	o	o	0	
Downtown Newark Arts District	Newark	Essex	Art Gallery	o	o	o	o	o	0	o
Hunterdon Museum of Art	Clinton	Essex	Art Museum	o	o	o	o	o	\$	
Montclair Art Museum	Montclair	Essex	Art Museum	o	o	o	o	o	\$\$	o
Paul Robeson Galleries, Rutgers	Newark	Essex	Art Gallery	o	o	o	o	o	0	o
The Newark Museum	Newark	Essex	Art Museum	o	o	o	o	o	\$	o
Jersey City Museum	Jersey City	Hudson	Art Museum	o	o	o	o	o	\$	o
The Brennan Gallery	Jersey City	Hudson	Art Gallery	o	o	o	o	o		
The Morris Museum	Morris	Morris	Science & Arts Museum	o	o	o	o	o	\$\$	o
Broadway & LRC Galleries at Passaic County Community College	Paterson	Passaic	Art Gallery	o	o	o	o	o		
Broadway, LRC & Hamilton Club Galleries	Paterson	Passaic	Art Gallery	o	o	o	o	o		
Clifton Arts Center & Sculpture Park	Clifton	Passaic	Arts Center	o	o	o	o	o		
Galleries at William Paterson University	Wayne	Passaic	Art Gallery	o	o	o	o	o		
Hamilton Club Building	Paterson	Passaic	Art Gallery	o	o	o	o	o		
Lambert Castle Museum	Paterson	Passaic	Art Museum	o	o	o	o	o		
Ringwood Manor Association of the Arts - The Barn Gallery	Ringwood	Passaic	Art Gallery	o	o	o	o	o	0	
Flying Pig Gallery	Sussex	Sussex	Art Gallery	o	o	o	o	o	0	
Lafayette Clayworks Gallery	Branchville	Sussex	Art Gallery	o	o	o	o	o	0	
Lake Mohawk Gallery	Sparta	Sussex	Art Gallery	o	o	o	o	o	0	
Peters Valley Craft Education Center	Layton	Sussex	Arts Center	o	o	o				
Union County College - Tomasulo Art Gallery	Springfield	Union	Art Gallery	o	o	o	o	o		
Visual Arts Center of New Jersey	Summit	Union	Arts Center	o	o	o	o	o		

## Other Museums

Name	City	County	Category	Website	Seasonality					Admission	Key Attraction
					Summer	Spring	Winter	Fall			
Aviation Hall of Fame and Museum of New Jersey	Teterboro	Bergen	Aviation Museum	o	o	o	o	o			
Bergen Museum of Art & Science	Paramus	Bergen	Science Museum	o	o	o	o	o			
New Jersey Children's Museum	Paramus	Bergen	Children's Museum	o	o	o	o	o	\$\$	o	
New Jersey Naval Museum	Hackensack	Bergen	Naval Museum	o	o	o	o	o	\$		
The New Jersey Historical Society Museum & Library	Newark	Essex	History Museum	o	o	o	o	o	\$		
The Newark Museum	Newark	Essex	Science & Arts Museum	o	o	o	o	o	\$	o	
Afro-American Historical Society Museum	Jersey City	Hudson	History Museum	o	o	o	o	o	0	o	
Hoboken Historical Museum	Hoboken	Hudson	History Museum	o	o	o	o	o	0	o	
Immigration Museum at Ellis Island	Jersey City	Hudson	History Museum	o	o	o	o	o	0	o	
Liberty Science Center	Jersey City	Hudson	Science Museum	o	o	o	o	o	\$\$	o	
Acorn Hall	Morristown	Morris	History Museum	o	o	o	o	o	\$		
Lake Hopatcong Historical Museum	Landing	Morris	History Museum	o	o				0		
Morris Plains Museum	Morris Plains	Morris	History Museum	o	o	o	o	o	0		
Museum of Early Trades & Crafts	Madison	Morris	History Museum	o	o	o	o	o	\$		
Community Children's Museum	Dover	Morris	Children's Museum	o	o	o	o	o	\$	o	
The Stickley Museum at Craftsman Farms	Parsippany	Morris	Crafts Museum	o	o	o	o	o		o	
Tunis-Ellicks Historic House & Museum	New Vernon	Morris	History Museum								
American Labor Museum/Botto House National Landmark	Haledon	Passaic	History Museum	o	o	o	o	o			
Hamilton House Museum	Clifton	Passaic	History Museum	o	o	o	o	o			
Paterson Museum	Paterson	Passaic	History Museum	o	o	o	o	o			
Yogi Berra Museum & Educational Center at Montclair State University	Little Falls	Passaic	Sports Museum	o	o	o	o	o	0		
Franklin Mineral Museum Inc.	Franklin	Sussex	Science Museum	o	o	o		o	\$		
Space Farms Zoo and Museum	Sussex	Sussex	Science Museum	o	o	o		o	\$\$		
Sterling Hill Mining Museum	Ogdensburg	Sussex	Science Museum	o	o	o	o	o	\$		
Sussex County Historical Society/Hill Memorial Museum	Newton	Sussex	History Museum	o	o	o	o	o	0		
Thomas A. Edison Memorial Tower & Menlo Park Museum	Edison	Sussex	History Museum	o	o	o	o	o	\$	o	
Liberty Hall Museum	Union	Union	History Museum	o	o	o	o	o	\$\$		
Littell-Lord Farmhouse Museum	Berkeley Heights	Union									
Phillipsburg Railroad Historians Museum	Phillipsburg	Warren	History Museum	o	o	o	o	o	0		

## Other Museums

Name	City	County	Category	Seasonality					Admission	Key Attraction
				Website	Summer	Spring	Winter	Fall	0 \$ - less than \$10 \$\$ - \$10 to \$25 \$\$\$ - over \$25	
Warren County Historical Society Museum	Oxford	Warren	History Museum	o	o	o	o	o	0	

## Dance

Name	City	County	Category	Website	Seasonality				Admission	Key Attraction
					Summer	Spring	Winter	Fall		
New Jersey Ballet	Livingston	Essex	Dance	o	o	o	o	o	\$\$\$	
New Jersey Performing Arts Center	Newark	Essex	Dance	o	o	o	o	o	\$\$\$	
South Orange Performing Arts Center	South Orange	Essex	Performing Arts Center	o	o	o	o	o	\$\$\$	o
Westminster Arts Center	Bloomfield	Essex	Dance	o	o	o	o	o	\$	
New Jersey City University West Side Theater	Jersey City	Hudson	Dance	o	o	o	o	o	0 to \$	
Carolyn Dorfman Dance Co.	Union	Union	Dance	o	o	o	o	o	\$\$\$	
Ritz Theatre Performing Arts Center	Elizabeth	Union	Dance	o	o	o	o	o	\$\$\$	



## Theater

Name	City	County	Category	Website	Seasonality					Admission	Key Attraction
					Summer	Spring	Winter	Fall	0 \$ - less than \$10 \$\$ - \$10 to \$25 \$\$\$ - over \$25		
Bergen Community College, Community and Cultural Affairs	Paramus	Bergen	Performing Arts Center	o		o	o	o		0	
Bergen PAC	Englewood	Bergen	Performing Arts Center	o		o	o	o	o	0	
Berrie Center for Performing and Visual Arts, Ramapo College of NJ	Mahwah	Bergen	Performing Arts Center	o		o	o			0	
Puffin Cultural Forum	Teaneck	Bergen	Performing Arts Center	o		o	o	o	o	0	
The Garage Theatre Group, Becton Theatre at Fairleigh Dickinson University	Teaneck	Bergen	Theater	o		o	o	o		0	
William Carlos Williams Center for the Arts	Rutherford	Bergen	Theater	o						0	
12 Miles West Theatre Company	Bloomfield	Essex	Theater	o		o	o	o	o	0	
Dreamcatcher Repertory Theatre, c/o The Baird Theatre	South Orange	Essex	Performing Arts Center	o		o	o	o	o	0	
Luna Stage	Montclair	Essex	Theater	o		o	o	o	o	0	
Montclair Arts Council	Montclair	Essex	Performing Arts Center	o		o	o	o	o	0	
New Jersey Performing Arts Center	Newark	Essex	Performing Arts Center	o		o	o	o	o	0	
Paper Mill Playhouse	Millburn	Essex	Theater	o		o	o	o	o	0	o
Prudential Center	Newark	Essex	Arena	o		o	o	o	o	0	
Studio Players	Upper Montclair	Essex	Theater	o		o	o	o	o	0	
Theatrefest at Montclair State University	Upper Montclair	Essex	Theater	o		o				0	
Wellmont Theater	Montclair	Essex	Theater	o		o	o	o	o	0	o
What Exit Theatre Company, Burgdoff Cultural Center	Maplewood	Essex	Theater	o		o		o		0	
New Jersey City University West Side Theater	Jersey City	Hudson	Theater	o		o	o	o		0	
Park Performing Arts Center	Union City	Hudson	Performing Arts Center	o		o	o	o	o	0	
St. Peter's College	Jersey City	Hudson	Performing Arts Center	o		o	o	o	o	0	
The Center for Performing Arts at De Baun Auditorium	Hoboken	Hudson	Theater	o		o	o	o	o	0	
All Children's Theatre	Parsippany	Morris	Childrens Theater	o		o	o	o	o	0	
Chatham Community Players	Chatham	Morris	Theater	o		o	o	o	o	0	
Chester Theatre Group at the Black River Playhouse	Chester	Morris	Community Theater	o		o	o	o	o	0	
Darress Theatre	Boonton	Morris	Vaudeville	o		o	o		o	0	
Dover Little Theatre	Dover	Morris	Theater	o		o	o		o	0	
Growing Stage Theatre	Netcong	Morris	Childrens Theater	o		o	o	o	o	0	
Murder To Go Dinner Theater	Cedar Knolls	Morris	Dinner Theater	o		o	o	o	o	0	
Pax Amicus Castle Theatre	Budd Lake	Morris	Theater	o		o	o	o	o	0	
Playwrights Theatre of New Jersey	Madison	Morris	Theater	o		o	o	o	o	0	
The Community Theatre at Mayo Center for the Performing Arts	Morristown	Morris	Community Theater	o		o	o	o	o	0	o
The Shakespeare Theatre of New Jersey	Madison	Morris	Theater	o		o	o	o	o	0	o
Ace in the Hole	Wayne	Passaic	Dinner Theater	o		o	o	o	o	0	
Alliance Repertory Theatre Company, Montclair Arts Forum	Paterson	Passaic	Theater	o		o	o	o	o	0	
The Poetry Center at Passaic County Community College	Paterson	Passaic	Poetry Center	o		o	o	o	o	0	
YM-YWCA of North Jersey	Wayne	Passaic	Community Theater	o		o	o	o	o	0	
Cornerstone Playhouse Inc.	Sparta	Sussex		o		o				0	
Plays-in-the-Park	Edison	Sussex	Summer Stage	o		o				0	
Tri-State Actors Theater	Sussex	Sussex	Theater	o		o	o	o	o	0	
Premiere Stages at Kean University	Union	Union	Theater	o		o		o	o	0	
Ritz Theatre Performing Arts Center	Elizabeth	Union	Theater	o		o	o	o	o	0	
Summit Playhouse	Summit	Union	Community Theater	o		o	o	o	o	0	
Union Arts Center	Rahway	Union	Performing Arts Center	o		o	o	o	o	0	
Centenary Stage Company	Hackettstown	Warren	Theater	o		o	o	o	o	0	o
Country Gate Players	Belvidere	Warren	Community Theater	o		o	o	o	o	0	o

## Heritage Tourism

Name	City	County	Category	Seasonality					Admission	Key Attraction
				Website	Summer	Spring	Winter	Fall	0 \$ - less than \$10 \$\$ - \$10 to \$25 \$\$\$ - over \$25	
Campbell-Christie House	River Edge	Bergen	Historic Site	o	o	o	o	o	0	
Easton Tower County Historic Site	Paramus	Bergen	Historic Site	o						
Historic New Bridge Landing Park	River Edge	Bergen	Historic Site	o	o	o	o	o	0	
Stuben House	River Edge	Bergen	Historic Site	o	o	o	o	o	0	
The Hermitage	Ho-Ho-Kus	Bergen	Historic Site	o	o	o	o	o		
The Lester Stable	Ridgewood	Bergen	Historic Site							
Cathedral Basilica of the Sacred Heart Cor	Newark	Essex	Historic Site	o	o	o	o	o	0	
Edison National Historic Site	West Orange	Essex	Historic Site	o	o	o	o	o	0	o
Glenmont Mansion	West Orange	Essex	Historic Site	o	o	o	o	o	\$	
Grover Cleveland Birthplace	Caldwell	Essex	Historic Site	o	o	o	o	o	0	
New Jersey Historical Society	Newark	Essex	Historical Society	o	o	o	o	o	0 to \$	o
Red Mill Museum Village	Clinton	Essex	Museum	o	o	o			\$	
Central Railroad of NJ Terminal (CCRNJ)	Jersey City	Hudson	Historic Site	o	o	o	o	o	0	o
Hudson County Court House National Historic Site	Jersey City	Hudson	Historic Site	o	o	o	o	o		
Immigration Museum at Ellis Island	Jersey City	Hudson	Heritage Museum	o	o	o	o	o	0	
Loew's Theater	Jersey City	Hudson	Historic Theater	o	o	o	o	o	\$	
Stanley Theater	Jersey City	Hudson	Historic Theater		o	o	o	o	0	
Statue of Liberty	Jersey City	Hudson	Historic Site	o	o	o	o	o	0	
Acorn Hall	Morristown	Morris	Historic Site	o					\$	o
Boonton Historic District	Boonton	Morris			o	o	o	o	0	
Cooper Gristmill	Chester	Morris	Historic Site	o	o	o	o	o	0	
Ford Mansion	Morristown	Morris			o	o	o	o	0	o
Fosterfields Living Historical Farm	Morristown	Morris	Historic Village		o	o		o		o
Historic Speedwell	Morristown	Morris	Historic Village Reenactment	o	o	o		o	0	o
Jockey Hollow	Morristown	Morris	Historic Site		o	o	o	o	0	
Macculloch Hall	Morristown	Morris	Historic Site							
Morristown National Historic Park	Morristown	Morris	Historic Park	o	o	o	o	o	0 to \$	o
Schuyler Hamilton House	Morristown	Morris	Historic Site	o	o	o	o	o	0	o
Dey Mansion	Wayne	Passaic	Historic Site	o	o	o	o	o	\$	
Long Pond Ironworks Historic District	West Milford	Passaic	Historic Site and Museum	o	o	o		o	\$	
Ringwood Manor	Ringwood	Passaic	Historic Site	o	o	o	o	o	\$	
The Great Falls Cultural and Historic Center	Paterson	Passaic	Historic Park	o	o	o	o	o	0	
Elias Van Bunschooten Museum	Sussex	Sussex			o	o	o	o	\$	
Foster-Armstrong House	Montague	Sussex	Historic Site		o	o	o	o	0	
Historic Society of Stillwater Township Museum	Newton	Sussex	Historic Village	o	o				0	
Nelden-Roberts Stonehouse	Montague	Sussex	Historic Site		o	o	o	o	0	
The Historic Village of Waterloo	Stanhope	Sussex	Historic Village	o	o	o	o	o	0	
Boxwood Hall State Historic Site	Elizabeth	Union			o	o	o	o	0	
Donkin Heritage Trail	Elizabeth	Union			o	o	o	o	0	o
Merchants and Drivers Tavern Museum	Rahway	Union	Historic Site and Museum	o	o	o	o	o	0	
The Deserted Village of Feltville-Glenside Park	Berkeley Heights	Union			o	o	o	o	0	
Millbrook Village	Millbrook	Warren	Historic Village Reenactment	o	o	o	o	o	0	o
Shippen Manor	Oxford	Warren	Historic Site and Museum	o	o	o	o	o	o	
Plane 9 West	Stewartsville	Warren	Historic Site and Museum	o	o	o		o		o

**Outdoor Recreation**

Name	City	County	Category	Website	Seasonality				Admission	Key Attraction
					Summer	Spring	Winter	Fall		
Campgaw Mountain Ski Center	Mahwah	Bergen	Ski	o			o	\$\$\$		
Darlington Golf Course	Mahwah	Bergen	Golf	o	o	o	o	o	\$\$\$	
Emerson Golf Club	Emerson	Bergen	Golf	o	o	o	o	o	\$\$\$	
High Mountain Golf Club	Franklin Lakes	Bergen	Golf	o	o	o	o	o		
Orchard Hills Golf Course	Paramus	Bergen	Golf		o	o	o	o	\$\$\$	
Overpeck County Golf Course	Teaneck	Bergen	Golf	o	o	o	o	o	\$\$\$	
Paramus Golf & Country Club	Paramus	Bergen	Golf							
River Vale Country Club	River Vale	Bergen	Golf	o	o	o	o	o		
Rockleigh Golf Course	Rockleigh	Bergen	Golf	o	o	o	o	o	\$\$\$	
Saddle Ridge Riding Center	Franklin Lakes	Bergen	Stables	o					\$\$\$	
Valley Brook Golf Club	River Vale	Bergen	Golf	o	o	o	o	o	\$\$\$	
Meadowlands Xanadu	East Rutherford	Bergen	Ski, Skydiving						o	
Branch Brook Park	Newark	Essex	County Park		o	o	o	o	0	
Brookdale Park	Montclair	Essex	County Park		o	o	o	o	0	
East Orange Golf Course	Short Hills	Essex	Golf	o					\$\$\$	
Fernwood Golf Club	Roseland	Essex	Golf	o	o	o		o	\$	
Francis Byrne Golf Course	West Orange	Essex	Golf		o	o		o	\$\$	
Hendricks Field Golf Club	Belleville	Essex	Golf		o	o	o	o		
Weequahic Park	Newark	Essex	County Park		o	o	o	o	0	
Weequahic Park Golf Course	Newark	Essex	Golf		o	o	o	o	\$\$\$	
Liberty National Golf	Jersey City	Hudson	Golf	o	o	o	o	o	\$\$\$	
Liberty State Park	Jersey City	Hudson	Open Space	o	o	o	o	o	0	
Offshore Sailing School	Jersey City	Hudson	Sailing	o	o	o		o	\$\$\$	
Hackensack River	Jersey City	Hudson	Kayaking	o	o	o	o	o	0 to \$\$\$	
Abram S. Hewitt State Forest	Hewitt	Passaic	Open Space	o	o	o	o	o	0	
Echo Lake Stable	Newfoundland	Passaic	Stables	o	o	o	o	o	\$\$\$	
Farmstead Estates	Ringwood	Passaic	Stables		o	o	o	o		
Glenwild Greens	Bloomingtondale	Passaic	Golf	o	o	o		o	\$\$	
Long Pond Ironworks State Park	West Milford	Passaic	Open Space	o	o	o		o	\$	
Norvin Green State Forest	Ringwood	Passaic	Open Space	o	o	o	o	o	0	
Passaic County Golf Course	Wayne	Passaic	Golf	o	o	o	o	o	\$\$\$	
Ringwood State Park	Ringwood	Passaic	Open Space	o	o	o	o	o	0	
Wawayanda State Park	Hewitt	Passaic	Open Space	o	o	o	o	o	\$\$	
Crystal Springs Resort	Vernon	Sussex	Golf and Open Space	o	o	o	o	o	\$\$\$	
Delaware Water Gap		Sussex	National Park	o	o	o	o	o	0	
Diablo Freeride Park	Vernon	Sussex	Biking	o	o			o	\$\$\$	
Mountain Creek Ski Resort	Vernon	Sussex	Ski	o		o			\$\$\$	
Ash Brook Golf Course	Scotch Plains	Union	Golf						\$\$\$	
Galloping Hill Golf Course	Kenilworth	Union	Golf						\$\$\$	
Hyatt Hills Golf Complex	Clark	Union	Golf	o	o	o	o	o	\$\$\$	
Oak Ridge Golf Course	Clark	Union	Golf						\$\$\$	
Scotch Hills Country Club	Scotch Plains	Union	Golf						\$\$\$	
Watchung Stable	Mountainside	Union	Stables	o	o	o	o	o	\$\$\$	
Merrill Creek Reservoir	Washington	Warren	Ecological Center	o	o	o	o	o	0	

## Spectator Sports

Name	City	County	Category	Seasonality					Admission	Key Attraction
				Website	Summer	Spring	Winter	Fall	0 \$ - less than \$10 \$\$ - \$10 to \$25 \$\$\$ - over \$25	
Izod Center	East Rutherford	Bergen	Arena	o	o	o	o	o	\$\$ to \$\$\$	o
Giants Stadium	East Rutherford	Bergen	Stadium	o	o	o	o	o	\$\$\$	o
Meadowlands Racetrack	East Rutherford	Bergen	Horse Racing	o	o	o	o	o	\$	o
Meadowlands Stadium	East Rutherford	Bergen	Stadium							o
Prudential Center	Newark	Essex	Arena	o	o	o	o	o	\$\$ to \$\$\$	o
Bears and Eagles Riverfront Stadium	Newark	Essex	Stadium	o	o	o	o	o	\$ to \$\$	o
Red Bull Arena (under construction)	Harrison	Hudson	Stadium							o
Atlantic Health Jets Training Center	Florham Park	Morris	Training Center	o						o
Mennon Sports Arena	Morristown	Morris	Arena							o
New Jersey Jackals	Little Falls	Passaic	Stadium	o	o				\$ to \$\$	o
Skylands Park	Augusta	Sussex	Stadium	o	o					

## Shopping

Name	City	County	Category	Website	Seasonality					Admission	Key Attraction
					Summer	Spring	Winter	Fall	0 \$ - less than \$10 \$\$ - \$10 to \$25 \$\$\$ - over \$25		
Bergen Town Center	Paramus	Bergen	Regional Mall	o	o	o	o	o	0	o	
Brownstone Mill Antiques Center	Midland Park	Bergen	Antiques		o	o	o	o	0		
City Place, Promenade Mall	Edgewater	Bergen	Regional Mall	o	o	o	o	o	0	o	
Fashion Center	Paramus	Bergen			o	o	o	o	0		
Meadowlands Flea Market	East Rutherford	Bergen	Discount	o	o	o	o	o	0	o	
Mitsuwa Corp.	Edgewater	Bergen	Ethnic Retail	o	o	o	o	o	0		
Paramus Park Shopping Center	Paramus	Bergen	Regional Mall	o	o	o	o	o	0		
The Shops at Riverside	Hackensack	Bergen	Regional Mall	o	o	o	o	o	0	o	
Westfield Garden State Plaza	Paramus	Bergen	Regional Mall	o	o	o	o	o	0	o	
Downtown Clinton	Clinton	Essex	Traditional Main Streets								
Downtown Montclair	Montclair	Essex	Traditional Main Streets		o	o	o	o	0	o	
Ironbound District	Newark	Essex	Ethnic Retail	o	o	o	o	o	0	o	
Livingston Mall	Livingston	Essex	Regional Mall	o	o	o	o	o	0	o	
The Mall at Short Hills	Short Hills	Essex	Regional Mall	o	o	o	o	o	0	o	
Harmon Cove Outlet Center	Secaucus	Hudson	Outlet Mall	o	o	o	o	o	0	o	
Hudson Mall	Jersey City	Hudson	Regional Mall	o	o	o	o	o	0		
Newport Centre Mall	Jersey City	Hudson	Regional Mall	o	o	o	o	o	0	o	
Outlets at the Cove	Secaucus	Hudson	Outlet Mall	o	o	o	o	o	0		
Secaucus Shopping Outlets	Secaucus	Hudson	Outlet Mall	o	o	o	o	o	0	o	
The Mall at Mill Creek	Secaucus	Hudson	Outlet Mall	o	o	o	o	o	0	o	
The Plaza at Harmon Meadow	Secaucus	Hudson	Regional Mall	o	o	o	o	o	0	o	
Century 21	Morristown	Morris	Department Store	o	o	o	o	o	0	o	
Historic Chester Village	Chester	Morris	Traditional Main Street	o	o	o	o	o	0		
Historic Downtown Dover Flea Market	Dover	Morris	Discount		o	o	o		0		
Main Street in Historic Boonton	Boonton	Morris	Traditional Main Streets	o	o	o	o	o	0		
Rockaway Townsquare	Rockaway	Morris	Regional Mall	o	o	o	o	o	0		
Wayne Towne Center	Wayne	Passaic	Regional Mall	o	o	o	o	o	0		
Willowbrook Mall	Wayne	Passaic	Regional Mall	o	o	o	o	o	0		
Lafayette Mill Antiques Center	Lafayette	Sussex	Antiques	o	o	o	o	o	0		
Made in the Shade	Andover	Sussex	Antiques		o	o	o	o	0		
Menlo Park Mall	Edison	Sussex	Antiques	o	o	o	o	o	0		
Olde Lafayette Emporium	Lafayette	Sussex	Outlet Mall		o	o	o	o	0		
Olde Lafayette Village	Lafayette	Sussex	Traditional Main Street	o	o	o	o	o	0		
Ole Church Antiques	Branchville	Sussex	Antiques		o	o	o	o	0		
The Great Andover Antique Company	Andover	Sussex	Antiques		o	o	o	o	0		
IKEA	Elizabeth	Union	Big Box Retail	o	o	o	o	o	0	o	
Jersey Gardens	Elizabeth	Union	Outlet Mall	o	o	o	o	o	0	o	
Quaint Downtown Summit	Summit	Union	Traditional Main Street	o	o	o	o	o	0		
Quaint Downtown Summit	Summit	Union	Traditional Main Street	o	o	o	o	o	0		
The Summit Antiques Center	Summit	Union	Antiques	o	o	o	o	o	0		
Main Street	Hackettstown	Warren	Traditional Main Street	o	o	o	o	o	0		
Phillipsburg Mall	Phillipsburg	Warren	Regional Mall	o	o	o	o	o	0		

**Other EAR Assets**

Name	City	County	Category	Website	Seasonality					Admission	Key Attraction
					Summer	Spring	Winter	Fall			
Bergen Zoological Park	Paramus	Bergen	Zoo	0	0	0	0	0	0		
Ice House Hackensack	Hackensack	Bergen	Ice Rink	0	0	0	0	0			0
Meadowlands Xanadu	East Rutherford	Bergen	Multi-use	0							0
Medieval Times Dinner & Tournament	Lyndhurst	Bergen	Dinner Theater	0	0	0	0	0	\$\$\$		
Velocity 17	Maywood	Bergen	Amusement Park	0	0	0	0	0	\$		0
Turtle Back Zoo	West Orange	Essex	Zoo	0	0	0	0	0	\$		0
Mennon Sports Arena	Morristown	Morris	Ice Rink	0	0	0	0	0			
Wild West City	Netcong	Morris	Theme Park	0	0				\$\$		0
Floyd Hall Ice Arena	Little Falls	Passaic	Ice Rink	0	0	0	0	0	0		
Crystal Springs Resort	Vernon	Sussex	Resort Hotel	0	0	0	0	0	\$\$\$		0
Delaware Water Gap		Sussex	National Park	0	0	0	0	0	0		0
Mountain Creek Ski Resort	Vernon	Sussex	Ski	0			0		\$\$\$		0
Mountain Creek Waterpark	Vernon	Sussex	Waterpark	0	0				\$\$\$		0
Space Farms Zoo and Museum		Sussex	Zoo	0	0	0		0	\$\$		0
Tomahawk Lake Inc.	Sparta	Sussex	Waterpark	0	0				\$\$		0
Bowcraft Amusement Park	Scotch Plains	Union	Amusement Park	0	0				\$\$		
Pequest Trout Hatchery and Natural Resource Education Center	Oxford	Warren	Ecological Center	0	0	0	0	0			0
Pirates Cove at the Land of Make Believe	Hope	Warren	Amusement Park	0	0				\$\$		0

## C. Literature Review

### Memorandum

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Date: April 28, 2009  
To: Tanya Mitchell and the North Jersey Partners Advisory Committee  
From: Economics Research Associates  
Subject: Creative Communities Literature Review

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#### Introduction

ERA is working with North Jersey Partners to create a regional master plan for the entertainment arts and retail sectors (EAR sectors) within the eight-county region of Northern New Jersey. The goals of the Master Plan for the Creative Community Collaborative include economic development, job growth, and regional promotion of local destinations. This master plan will build upon prior studies, plans and other initiatives to increase the awareness of and grow entertainment, arts and retail destinations both state-wide and regionally. ERA began the master planning process with a review of fourteen prior studies and projects that are closely related to the Creative Communities Master Plan.

This literature review briefly describes fourteen existing studies, master plans, and websites recommended by the North Jersey Partners Advisory Committee. The memorandum is organized into two sections. Section 1: Document Review provides a brief summary of each document considered as part of the Literature Review. Section 2: Key Findings distills the lessons learned from the literature review that will be applied to the Creative Communities Master Plan.

#### 1. Document Review

ERA reviewed fourteen websites, studies, master plans, and articles that were recommended by the North Jersey Partners Advisory Committee as the inventory of existing studies/projects related to the Creative Communities Master Plan. This section lists each document and presents brief summary of the document and its conclusions.

- **NJ Tourism: An Economic Juggernaut (2008)**

This document, a presentation given by Kenneth McGill of Global Insight at the 2008 New Jersey Governor's Conference on Tourism, presents detailed quantitative estimates of the contribution of tourism to the New Jersey economy. The analysis indicates that in 2007, the visitor-related spending resulted in \$38.0 billion in expenditures, \$27 billion of which stayed in New Jersey (import leakage in 2007 was estimated at \$11 billion and represents spending on tourism goods and services produced outside of the state). Of the \$27 billion of Total Tourism Impact in New Jersey, \$19.8 billion is represented by Core Tourism (direct impacts), or expenditures at businesses that directly provide goods and

services to the visitor, such as restaurants and hotels. The impacts to Non-core Tourism industries, which represent indirect and investment impacts, were valued at \$7.2 billion in 2007 and represent expenditures at industries that directly provide goods and services to Core Tourism providers, such as food distribution and construction. The Core Tourism industry directly supports 383,900 jobs, which is equivalent to 9.4 percent of all jobs in New Jersey.

Tourism was New Jersey's third-fastest growing industry in 2007 and has been growing steadily for the last five years. Since 2002, total tourism expenditures have increased annually between 0.9 and 8.8 percent. Between 2006 and 2007, New Jersey domestic visitation grew by 5.8 percent; overnight visitation grew by 15.2 percent; the number of tourism jobs grew by 1.4 percent (from 378,600 to 383,900 jobs); and average annual core tourism wages grew by 5.1 percent to over \$34,000 annually.

The study also analyzes sources of tourism expenditures, including resident in-state, in-state business travel, government spending, investment, domestic out-of-state, and international. Visitors from other states represented the largest portion (66 percent; \$25.2 billion) of New Jersey's 2007 total tourism expenditure. Resident in-state travel comprised 22 percent of the total tourism expenditure.

The study summarizes expenditure by six designated tourism regions: Gateway, Skylands, Shore, Delaware River, Atlantic City and Southern Shore. These tourism regions are designated by the State Division of Travel and Tourism. The North Jersey eight-county region is located within the Skylands region in the northwest and the Gateway region in the northeast. Gateway has the second largest share of statewide tourism spending, which is largely attributable to traveler expenditures related to the airport. Greater Atlantic City captured 36 percent of the state's tourism expenditure. The eight-county region generated \$7.3 billion in tourism expenditure, or 20 percent of total tourism expenditure in New Jersey.

The study also analyzed tourism expenditures by region, including spending on entertainment, accommodation, transportation, food, and shopping. Of all visitor expenditure in the Skylands region, accommodation accounted for the most expenditure, similar to other regions. In the Gateway and Delaware River regions, however, transportation accounted for the most visitor expenditure.

- **FY2006p Visitor Profile**

D.K. Shifflet & Associates developed a comprehensive market analysis of overnight leisure visitors in New Jersey. Data from the study was collected from the D.K. Shifflet & Associates' syndicated travel study, which surveyed over 70,000 traveling households over three months using a mail-in questionnaire. The analysis reviews results of the survey and highlights demographic characteristics of visitors such as age, income, and residency. In addition, the document provides data on attraction choices, accommodation choice, party size, length of stay, and spending. The document only analyzes statewide trends and compares the results to an undefined "comparable set of states" and the United States overall, and does not specifically mention data on visitation in the 8-county region of North Jersey. The following key findings resulted from the study:

- New Jersey hit new records for both visitors and spending in 2006. Both Leisure and Business travel contributed to New Jersey's six year high of 71.1

million visitors. Overnight Leisure visitors, the focus of this report, increased by 4.3 percent in 2006. Visitor Spending in New Jersey is growing at a faster rate than visitors.

- New Jersey visitors tend to be older and have no children. With an average income of \$82,600, they earn higher incomes than visitors to the average U.S. destination or to its individual competitors. Boomers, who spend the most, make up the largest share of overnight leisure visitors to New Jersey.
  - One-third of New Jersey’s Overnight Leisure travel is for Getaway Weekends as opposed to the average U.S. destination and the competitive set, where Visiting Friends and Relatives is the main purpose for travel.
  - Almost 90 percent of visitors to New Jersey arrive by car and 77 percent traveling 200 or fewer miles to arrive to their destination
  - More New Jersey visitors engage in Gaming, Dining, Entertainment Night Life and Beach activities than visitors to its competitive set or the average U.S. destination.
  - New Jersey hosts the largest proportion of its visitors in the third quarter, particularly in July and August.
  - More than half of New Jersey’s visitors come from either New York or the State itself. New York City and Philadelphia are the top two market areas for New Jersey in terms of visitors, however, visitors who spend the most come from the market areas of Syracuse, Albany, Schenectady, Troy, and West Palm Beach-Ft. Pierce. In the past year New York State accounted for 1 in 4 visitors to New Jersey and during the past three years 40 percent of New Jersey visitors have hailed from the DMA of New York, NY.
  - Most travelers to New Jersey are couples and travel for Getaway Weekends. Travel parties of three or more adults or those with children present are the most financially valuable to the State, thus promoting “double date” or “family” travel would increase travel parties and thus spending in New Jersey.
  - Nine out of ten New Jersey visitors arrive by car and more than 3 out of 4 travels 200 or fewer miles. They most often come for Gaming, but spend the most on Entertainment.
- **New Jersey Division of Travel and Tourism Website –**  
[www.state.nj.us/travel/industry.html](http://www.state.nj.us/travel/industry.html) or [www.visitNJ.org](http://www.visitNJ.org)

The New Jersey Division of Travel and Tourism website serves as an ongoing effort to provide journalists within the tourism industry, New Jersey residents and prospective visitors with the most efficient, detailed and updated information on the Garden State's diverse tourism industry. This website serves as the official tourism website for New Jersey presents attractions and destinations organized by category with brief descriptions and locations.

The New Jersey Division of Travel and Tourism website offers tourism highlights for each region, and a comprehensive listing of destinations by category for each region. Tourism categories include Arts and Culture; History and Heritage; Destinations; Family Fun; outdoor Activities; and Shopping. The state's tourism regions are Skylands; Gateway; Shore; Delaware River; Atlantic City and Southern Shore. The site also offers the ability for users to conduct a detailed search that can isolate subsets of each tourism category and allows broader or more general geographic designations (from statewide to a specific street address).

In addition to information about tourism destinations, this website lists discounts and offers for vacation packages, lodging, and dining. The restaurant search engine, powered by New Jersey Monthly magazine, generates restaurant suggestions. The site also offers a comprehensive list of hotels in each region and driving directions to each destination.

The website also offers information to help promote tourism destinations and provide up to date research. The website provides information about the two state grant programs, a Cooperative Marketing Grant and a Destination Marketing Organization Grant, which are offered to organizations that promote and work to enhance tourism in the state. The website also provides information on the NJ Governor Conference on Tourism, resources for travel agents and tour groups, economic impacts studies from 2003 to 2008, overnight visitor profiles from 2004 to 2006, and other tourism reports.

- **New Jersey Image Study (2005)**

This study, by D.K. Shifflet & Associates and Global Insight, measures the perception of New Jersey as a travel destination. The survey polled any traveler who took a leisure trip to New York, New Jersey, or Pennsylvania in the previous 12 months or planned to take a trip in the next 12 months. The report found that the Atlantic City and Cape May regions had the highest awareness, most activity, and most positive image. Most travelers planned their trip in less than two months, with weekend visitors planning their trip just three weeks beforehand. The report recommends marketing strategies including the encouragement of follow-up marketing with existing visitors and making destination information more prevalent on hotel websites, state travel websites, guidebooks, and guidebooks. With respect to North Jersey, destinations that had low awareness levels among survey respondents included Mountain Creek and NJPAC.

- **New Jersey Tourism Master Plan (1997)**

The NJ Division of Travel & Tourism in 1997 under the Whitman administration developed the New Jersey Tourism Master Plan. The document provides an assessment of tourism in New Jersey, a vision of tourism in the future, and public sector strategies to achieve that vision and improve the tourism in the state. The Master Plan made the following key recommendations:

- **Promotion:** The plan recommends focusing on the New Jersey, New York City, and Philadelphia markets while nurturing markets to the south and west. In addition, it recommends leveraging the proximity of cultural destinations in New York City and Philadelphia to attract visitors interested in arts and culture to New Jersey. Because most visitors to New Jersey come to visit friends and relatives, the plan also recommends improving resident familiarity

with in-state activities to encourage more participation and longer stays. In terms of promotion of individual attractions, the plan recommends improved signage and destination themes.

- Improvement of Tourism Products and Services: The plan recommends investment in historic and cultural sites, ecotourism, urban tourism clusters, scenic byways, and new attractions. To bolster service and capacity, the plan also recommends increased hospitality training and new hotel properties.
- Strengthened Tourism Organizations: The plan recommends increased intrastate and interstate cooperation to generate additional visitation, particularly cultural and heritage tourism.
- Expanding Finance for Tourism Development and Promotion: The plan recommends studying and communicating the economic development benefits of tourism. In terms of policy, it recommends accessing funds dedicated to economic development, transportation, historic preservation, and conservation to help develop tourism products and services. Another recommendation suggests the provision of tax credits and loan programs to encourage investment in tourism-related businesses.

- **Arts Plan New Jersey: Harnessing the Power of the Arts (2008)**

The New Jersey State Council on the Arts hired Wolf, Keens, and Co to develop a master plan to improve the state through the arts. The plan, endorsed by Governor Corzine in March 2008, built upon the efforts a 300-person working group, the Governor's Conference on the Arts, and public comments of the plan. The 2008 Arts Plan was the second Arts Plan for the state; the original Arts Plan NJ, passed in 1998, resulted in the New Jersey Cultural Trust, Discover Jersey Arts Marketing, advances in education reform that promoted arts, intensified arts advocacy, and other tourism initiatives.

The goals of 2008 Arts Plan NJ include growing thriving communities through arts, building strong arts institutions, universal arts education, building a stronger network infrastructure for artists, improve access to the arts and applying new technology for communication among New Jersey artists.

The Arts Plan details an action plan that calls for the participation of a range of sectors. Action plan initiatives include: sustaining the gains made through the original Arts Plan NJ; strengthening arts advocacy by partnering with the ArtPride NJ Foundation, developing cultural tourism initiatives, developing partnerships with the healthcare field and other natural allies, and developing new and larger financial resources for the arts that build capacity, sustainability and public value. The plan recommends investing in resources that help artists thrive in the travel and tourism industry, such as developing maps, signs, and guides to connect people to available cultural resources; tapping into other tourism networks, such as heritage tourism, the NJ Division of Travel and Tourism, the Department of Transportation and other involved industries such as hotels, restaurants and chambers of commerce.

- **Survey to Improve the Effectiveness of Tourism Promotion (2008)**

The Richard Stockton College of New Jersey was commissioned to conduct an annual survey of the tourism industry in New Jersey to help enhance the effectiveness of tourism

promotion. The 2008 survey generated 1,400 interviews of residents of sixteen designated marketing areas (DMAs) where the NJ Division of Travel and Tourism advertises. The survey concluded that most non-resident visitors to New Jersey reside in the New York City and Philadelphia DMAs. The survey results include discussions on age, choice of activities, sources of information, and factors that influence tourism choices.

The survey concluded that the state's tourism promotion attracts both visitors and vacationers to New Jersey. However the state's promotional budget is significantly smaller than the promotional budgets for Pennsylvania and New York, creating a competitive challenge for the state. Television advertising is the state's most effective promotion method, followed by recommendations from friends and family and the Internet. The study recommends continued promotion of the state's website.

The study also concludes that one of New Jersey's leading advantages is the variety of activities available within the state. The study recommends that the state should highlight this diversity of activities in its promotional initiatives.

- **Union County Tourism Master Plan (2007)**

The Union County Office of Cultural and Heritage Affairs hired EnRoute Consulting to develop a tourism master plan for the county in December 2007. The report includes an inventory of all assets in Union County including historic structures, shopping centers, golf courses, main streets, theaters, museums, arts districts, and parks. Specific attractions in Union County include Jersey Gardens Mall, the Union County Performing Arts Center, the Olmsted-designed Union County park system, and many heritage tourism sites associated with the American Revolution, including Liberty Hall. Additionally, the county's events attract thousands of visitors each year. For example, More than 40,000 people from throughout the region attended Union County's 2007 MusicFest.

Jersey Gardens is a significant tourism attractor and is the site of an official New Jersey State visitor center. The mall estimates that tourists account for 20 percent of the mall's business. Approximately 40 percent of visitors to the Gardens are overnight visitors. According to Jersey Gardens, feeder markets include the Midwest and Canada. Additionally, the property contracts a tourism consultant in Europe to generate visitation. 2,400 motor coach groups were projected to visit in 2007. Additionally, Jersey Gardens runs a shuttle to and from Newark Airport, attracting travelers with extended layovers in Newark Airport due to flight delays and cancellations.

Despite its multiple tourism destinations, there is not an organized tourism industry in Union County largely because there is not a DMO or CVB that is dedicated to promoting tourism destinations within Union County. Visitors are coming to Union County for its hotels, Newark Airport, and Jersey Gardens Mall, but do not currently experience all of the County assets. Many visits are one-dimensional, centering on shopping or travel only.

Stakeholders interviewed as part of the master planning process identified several themes as potential tourism products for Union County, including American History; Arts & Culture; Industrial/ Transportation History; Outdoors: Nature & Recreation and Ethnic Heritage. Stakeholder "wish lists" include increased signage and streetscaping, waterfront development, additional restaurants, and a major visitor draw.

The master plan details six recommendations for defining and building a structured tourism industry in Union County: (1) Establish a tourism point person for Union County within the Office of Cultural and Heritage Affairs with the funding and tools needed to foster education, coordination, and communication; (2) Develop ongoing communication between tourism industry partners and stakeholders; (3) Develop basic tourism marketing tools (i.e. a visitors' guide or a web site) to communicate with visitors and generate revenue; and (4) Capitalize on existing and high-potential attractors (such as Jersey Gardens, Liberty Hall, Kean University, Mid-Town Elizabeth, the Union County Arts Center, and Downtown Rahway) to draw and keep overnight visitors; (5) Develop a plan to transform Four Centuries in a Weekend (or similar weekend) into tourism product; and (6) Develop tourism assets with an eye to the future.

- **Celebrate NJ! – [www.celebratenj.org](http://www.celebratenj.org)**

Celebrate NJ! is a non-profit organization founded in August 2006. The organization has the mission of creating statewide awareness and pride in events, destinations, and other attractions in New Jersey. Celebrate NJ! is supported by a collection of 25 partner groups that represent a variety of tourism advocacy organizations in the state, including AboutNewJersey.com, ArtPride NJ, Association of New Jersey County Cultural & Heritage Agencies, Crossroads of the American Revolution Association, Greater Camden Partnership, New Jersey Chamber of Commerce, New Jersey Department of Environmental Protection, Natural & Historic Resources, New Jersey League of Municipalities, New Jersey Office of Travel & Tourism, Preservation New Jersey and more.

The organization has spearheaded three ongoing efforts in New Jersey: (1) NJPOI.com, (2) a no fee teaching tool for 4<sup>th</sup> grade classrooms, and (3) a wayfinding plan for the entire state. The organization does not offer specific strategies for North Jersey, but provides a centralized database of tourism destinations in the state.

- **NJPOI – [www.NJpoi.com](http://www.NJpoi.com)**

The website, supported by Celebrate NJ!, presents a database of “points of interest” in New Jersey using a Google Maps interface and a search tool. The website is a component of a statewide Wayfinding Initiative. The vision for NJPOI is to make New Jersey a more welcoming, livable, friendly place by helping us find our way with ease and by making all our many points of interest and areas of natural beauty more accessible.

NJPOI offers a destination database that is sorted according to city and point of interest category. There are eight point of interest categories that include arts and culture; educational activities; food and lodging; history; outdoor activities; shopping; sports and entertainment; and visitor information. The site also provides travel information by public transportation.

NJPOI's search tool has usability disadvantages because it users must search for destinations by city, rather than regionally. While you can select up to a 20 mile radius around a city, you cannot use NJPOI's database to find all of the points of interest within a region. For example, NJPOI does not allow you to search for all of the arts and culture activities within the Gateway region.

- **New Jersey Wayfinding Plan (2009)**

Celebrate NJ! sponsored a New Jersey Wayfinding Master Plan completed by MERJE and other consultants in February 2009. "Wayfinding Programs" typically include a coordinated signage system, distinct landmarks, printed support materials and electronic media information. When coordinated properly a Wayfinding program also promotes a consistent identity and acts as a powerful marketing tool. A successful wayfinding strategy can also increase economic prosperity by bringing visitors to their destinations with ease. The 2009 New Jersey Wayfinding Plan provides an assessment and recommendations for a coordinated system of signage with consistent rules for words, colors, symbols, paper maps, and electronic forms.

The Plan identifies the six official tourism zones within New Jersey and provides associated icons and recommends their use in signs and other media. Wayfinding zones reflect the unique character, and culture of an area while maintaining a consistent presentation of information to the traveler. The six zones recommended in the New Jersey Wayfinding Plan are: Skylands, North Jersey, Capital, Shore, South Jersey and South Shore. The North Jersey region spans the Skylands and North Jersey zones.

The Plan also recommends criteria and design standards for new tourist oriented directional signage (TODS) on roadways; wayfinding systems in urban areas; and wayfinding systems for corridors with an economic, historic, or tourist theme. The statewide plan also identifies the Morristown-Pluckemin corridor which covers part of Morris County as a potential pilot program to implement new signage and develop materials to link attractions.

- **Heritage Tourism Task Force – [www.state.nj.us/dca/njht/publ/njhttf.html](http://www.state.nj.us/dca/njht/publ/njhttf.html)**

The New Jersey Historic Trust's Heritage Tourism Task Force, under the state Department of Community affairs, has the mission to improve New Jersey's performance in the regional and national heritage tourism market. The Task Force was established by the legislature and is charged with conducting a survey and inventory of New Jersey's historic resources, establishing a signage and marker program and promoting coordination among New Jersey's historic sites. The Task Force will also encourage the State, counties and municipalities to focus on heritage tourism. Finally, the Task Force has been charged with identifying stable sources of funding for the enhancement, maintenance and interpretation of our historic sites. There are seventeen Heritage Tourism Task Force members

- **Crossroads of the American Revolution – [www.revolutionarynj.org](http://www.revolutionarynj.org)**

Crossroads of the American Revolution Association was founded in 2002 as the only state-wide non-profit organization established to offer a forum for new citizen initiatives on education, historical interpretation, site use and heritage tourism; and to raise popular appreciation of the historical significance of the American Revolution in New Jersey. The organization involves local communities and other partners to revitalize New Jersey's historic cities and towns by reclaiming, enhancing and linking Revolutionary War sites and heritage landscapes.

The Crossroads of the American Revolution National Heritage Area in New Jersey, designated by Congress, extends from Bergen and Passaic in northern New Jersey and extends to Gloucester County in the south. In total, the Crossroads Heritage Area encompasses 213 cities and towns and all or parts of 14 counties. This area includes Morristown National Historical Park, Princeton and Monmouth Battlefield State Parks, Washington's Crossing State Park, New Bridge Landing, the Old Barracks in Trenton, 13

National Historic Landmarks and more than 250 other National Register of Historic Places sites and districts. All these sites have significant Revolutionary War period resources and that has secured their protection.

The organization completed visioning workshops in August 2006, and designated a pilot area in which to develop a coordinated interpretive program that, if successful, could be replicated across the region. The pilot area, which is located in Morris and Somerset counties, includes Bedminster Township; Bernards Township; Bernardsville; Chatham Borough; Chatham Township; Far Hills Township; Harding Township; Long Hill Township; Madison Borough; Mendham Borough; Mendham Township; Morris Township; Morristown; and Peapack Gladstone. Interpretive themes considered in the report include: A Revolutionary Landscape; Rendezvous for Rebellion; and Divided Loyalties.

- **2005 Welcome Center Survey Report**

The 2005 Welcome Center Survey Report was prepared by the School of Business at Montclair State University and the New Jersey Commerce, Economic Growth and Tourism Commission. The survey analyzed all eight New Jersey Welcome Centers to understand which services were used by visitors, visitor demographics, and the economic impact of the facilities. The Welcome Centers, located off major highways, house restroom facilities and often include maps and information on attractions, lodging, dining, shopping, and recreation opportunities. The following welcome centers were surveyed: Atlantic City, Deepwater, John Fenwick, Knowlton, Liberty Statue, Molly Pitcher, Montvale and Ocean View.

The survey report is based on 1,284 completed surveys at the Welcome Centers, and an additional 304 mail-in surveys that were sent to welcome center visitors as a follow-up. The study found that primary purposes for trips included visiting friends (22 percent), shopping (19 percent), touring/sightseeing (11 percent), or for outdoor recreation (7 percent). The majority of trips included daytrips or visits for one to two nights. The study concluded that Welcome Centers offer an opportunity to better market destinations and attractions in New Jersey.

## 2. Key Findings

ERA has carefully reviewed the prior studies related to arts, entertainment, recreation and tourism, tourism-related websites, arts and tourism master plans and other relevant analyses. From this literature review, we have identified key findings that will inform the Creative Communities Master Plan. The following section highlights key questions that will inform the master plan and findings from the literature review that help answer these question.

### (1) How many visitors come to New Jersey annually?

- New Jersey had 75.2 million visitors in 2007, representing an all-time high. Between 2006 and 2007, New Jersey domestic visitation grew by 5.8 percent; overnight visitation. (*NJ Tourism: An Economic Juggernaut, 2008*)

### (2) What are the demographic characteristics of New Jersey visitors?

- The average age of overnight leisure visitors was 48, older than visitors within the United States overall. Boomers account for the highest share of visitors in New Jersey, whereas Gen X consists of the majority of visitors in comparable states. *(FY2006p Visitor Profile)*
- New Jersey has a lower share of parties with children compared to parties visiting comparable states. Visitors had an average household income of \$82,600 higher than visitors to other states with 75 percent of visitors with more than \$75,000 household income. *(FY2006p Visitor Profile)*

### **(3) Where do New Jersey visitors reside?**

- More than half of New Jersey's visitors come from either New York or the State of New Jersey. In the past year New York State accounted for 1 in 4 visitors to New Jersey and during the past three years 40 percent of New Jersey visitors have hailed from the New York City market area. *(FY2006p Visitor Profile)*
- New York City and Philadelphia are the top two market areas for New Jersey in terms of number of visitors. *(FY2006p Visitor Profile)*
- Visitors who spend the most money come from the market areas of Syracuse, Albany, Schenectady, Troy, and West Palm Beach-Ft. Pierce. *(FY2006p Visitor Profile)*
- 77 percent of all overnight leisure visitors traveled fewer than 200 miles. The New York City and Philadelphia market areas, which include relevant parts of New Jersey, accounted for two-thirds of overnight leisure visitors. Other large market areas of overnight leisure visitors include the Washington, DC, Baltimore, and Boston markets. *(FY2006p Visitor Profile)*

### **(4) Why do visitors travel to New Jersey?**

- Of all visitors in 2006, 19 percent traveled for business and 81 percent traveled for leisure. *(FY2006p Visitor Profile)*
- A large share, 45 percent, of New Jersey overnight leisure visitors participated in gambling activities. Other popular activities include dining (40 percent), entertainment (36 percent), shopping (26 percent), night life (23 percent), and the beach/waterfront (22 percent). In all of these categories, New Jersey exhibited higher participation rates than comparable states. New Jersey exhibited low participation rates compared to comparable states for sightseeing, theme parks, national/state parks, historic sites, museums, and outdoor activities. *(FY2006p Visitor Profile)*
- Among visitors to state welcome centers, that primary purposes for trips included visiting friends (22 percent), shopping (19 percent), touring/sightseeing (11 percent), or for outdoor recreation (7 percent). *(Welcome Center Survey Report, 2005)*
- The mega destinations in New Jersey include Atlantic City, Six Flags Great Adventure, and the Shore. A large majority of attractions in New Jersey attract fewer than 100,000 annual visitors. *(New Jersey Tourism Master Plan, 1997)*
- Among residents of New York, New Jersey, Connecticut, Pennsylvania, and Maryland planning a trip, Atlantic City, Six Flags Great Adventure, Cape May, and Wildwood had very high awareness levels. Those residents had low awareness of some of New Jersey's key cultural, historic, and outdoor recreation destinations including Mountain Creek and NJPAC. *(New Jersey Image Study, 2005)*

- Historic, cultural, and outdoor recreation opportunities in New Jersey are underdeveloped and unlinked in terms of the quality of the experience, wayfinding, and awareness. (*Union County Tourism Master Plan, 2007; New Jersey Tourism Master Plan, 1997; Arts Plan New Jersey, 2008; Heritage Tourism Task Force; New Jersey Wayfinding Plan, 2009*)
- One of New Jersey's leading advantages is the variety of activities available within the state. (*Survey to Improve the Effectiveness of Tourism Promotion, 2008*)
- Seasonal second homes are an important part of accommodation expenditure for counties along the coastline and for Sussex County. In 2007, there were 3,575 second homes in Sussex County, which generated \$53.6 million in rental income. (*NJ Tourism: An Economic Juggernaut, 2008*)

**(5) How long do visitors stay in New Jersey?**

- Of all leisure visitors, 50 percent stayed overnight and 50 percent made a day trip. (*FY2006p Visitor Profile*)
- The vast majority, 89 percent, of overnight leisure trip takers spent 1-3 nights on their trip with 41 percent spending one night and 48 percent spending 2-3 nights. When compared to comparable states, a lower proportion of visitors stayed 4 or more nights in New Jersey. The average length of stay in New Jersey for overnight leisure visitors was 2.24 nights, lower than the national average of 2.91 nights. (*FY2006p Visitor Profile*)

**(6) Have tourism regions been defined within New Jersey?**

- New Jersey Office of Travel and Tourism has divided the state into six tourism regions: Gateway (Passaic, Bergen, Essex, Hudson, Union, Middlesex Counties); Skylands (Sussex, Warren, Morris, Hunterdon and Somerset Counties); Shore (Monmouth and Ocean Counties); Delaware River (Mercer, Burlington, Camden, Gloucester and Salem Counties); and Greater Atlantic City (Atlantic County); Southern Shore (Cumberland and Cape May Counties). These tourism regions are widely used in many tourism plans and information sources. (*New Jersey Wayfinding Plan, 2009; NJPOI.com; VisitNJ.org; NJ Tourism: An Economic Juggernaut, 2008*)
- The eight-county region of North Jersey is located within the Skylands region in the northwest and Gateway region in the northeast.

**(7) How is tourism expenditure distributed among the counties and regions of New Jersey?**

- Of the six regions defined by Global Insight, the Greater Atlantic City region had the highest share (36 percent) of tourism expenditure, followed by the Gateway region with 19.5 percent, and the Shore and Southern Shore regions with 14 percent each. (*NJ Tourism: An Economic Juggernaut, 2008*)
- Atlantic, Cape May, and Ocean Counties account for nearly 60 percent of tourism expenditure in New Jersey. (*NJ Tourism: An Economic Juggernaut, 2008*)
- The eight-county region generated \$7.3 billion in tourism expenditure, or 20 percent of total tourism expenditure in New Jersey. (*NJ Tourism: An Economic Juggernaut, 2008*)

**(8) How is visitation distributed across seasons?**

- 32 percent of overnight leisure visitors began their trip in July and August, making the third quarter the most popular quarter for trips. The first quarter had 23 percent of visitors, second quarter had 26 percent, and the fourth quarter had 20 percent of visitors. In terms of total dollars spent on trips, the third quarter also had the highest share. (*FY2006p Visitor Profile*)

**(9) Where do New Jersey visitors get information about travel destinations and resources?**

- Two-thirds of the primary source market (residents of Connecticut, New York, New Jersey, Pennsylvania, and Maryland) used recommendations from friends and family in planning their trip. The next three most popular sources included Internet-based media – hotel websites, state travel websites, and travel booking websites. (*New Jersey Image Study, 2005*)

**(10) How do visitors travel to and within New Jersey?**

- The vast majority, 88 percent, of overnight leisure trip takers to New Jersey use an automobile. Compared to comparable states, lower shares of New Jersey visitors use air or other forms of transportation in their overnight leisure travel. (*FY2006p Visitor Profile*)

**(11) What are the economic impacts of tourism in New Jersey?**

- Total tourism-related expenditures in New Jersey totaled \$38 billion in 2007, with \$27 billion impact in New Jersey and \$11 billion leaked to imported tourism-related goods and services. (*NJ Tourism: An Economic Juggernaut, 2008*)
- In 2007, Atlantic County had the highest share (36 percent) of tourism expenditure followed by Cape May County, Ocean County, and Essex County. (*NJ Tourism: An Economic Juggernaut, 2008*)
- The eight-county region generated \$7.3 billion in tourism expenditure, or 20 percent of total tourism expenditure in New Jersey. (*NJ Tourism: An Economic Juggernaut, 2008*)
- Accommodation accounts for the largest share, 32 percent, of tourism expenditure, along with food and shopping at 23 and 21 percent respectively. (*NJ Tourism: An Economic Juggernaut, 2008*)
- Tourism directly supports 9.4 percent (383,900) of jobs in New Jersey. (*NJ Tourism: An Economic Juggernaut, 2008*)
- Tourism in New Jersey has generated \$7.3 billion in federal, state, and local tax revenue. (*NJ Tourism: An Economic Juggernaut, 2008*)

**(12) How is State tourism funding allocated?**

- Each tourism region has been organized through a volunteer regional tourism council and the NJ Office of Travel and Tourism has provided cooperative tourism marketing funds through these tourism councils. The level of organization for each tourism council varies by region. The Skylands and Shore regions have been active through a volunteer council, while the Delaware River region has benefited from a professional non-profit destination marketing organization – the South Jersey Tourism Corporation. The Gateway Region's tourism council has been inactive for two years or more. During that time, both the Middlesex County Chamber of Commerce and the Greater Meadowlands Chamber (both in the Gateway Region) have formed convention and visitors bureaus (CVBs) to help

develop tourism. A CVB is another name for a Destination Marketing Organization (DMO).

Beginning in 2008, the NJ Office of Travel and Tourism will change the way it provides cooperative marketing funds. Instead of funding regional tourism councils, funding will be available to DMOs that meet criteria needed to apply for cooperative marketing grants. (*Union County Tourism Master Plan, 2007*)

- New Jersey State's promotional promotion budget is significantly smaller than the promotional budgets for Pennsylvania and New York, creating a competitive challenge for the state. (*Survey to Improve the Effectiveness of Tourism Promotion, 2008*)

## D. Situational Survey

R.L. Repass & Partners, Inc. (RL Repass) was retained as part of the Creative Communities plan for North New Jersey to assess consumer interest in Northern New Jersey as a destination location for entertainment, arts and recreational activities. The following section summarizes key findings from the survey.

### Objectives

The objectives of the study include:

- Measure the frequency that respondents participated in specific recreational or leisure (EAR) activities within the past 12 months;
- Assess the likelihood that respondents would attend various entertainment, recreational or cultural (EAR) activities in Northern New Jersey;
- Measure the frequency that respondents attended various sightseeing, entertainment, arts, cultural or sports (EAR) events in Northern New Jersey in the past 12 months;
- Identify unmet recreational or cultural (EAR) activities in Northern New Jersey.

### Methodology

- Telephone interviews were conducted by trained, professional interviewers from the RL Repass National Call Center between May 15 and June 3, 2009.
- Interviews were conducted among male and female heads of households living in Northern New Jersey or adjoining states.
- A total of 407 interviews were conducted. The results were weighted to be statistically representative of the area based on gender and age.
- There are four geographic areas equally represented in the sample:
  - *Urban Northern New Jersey:* Bergen, Essex, Hudson, Passaic and Union Counties
  - *Non-Urban Northern New Jersey:* Morris, Sussex and Warren Counties
  - *Urban counties outside Northern New Jersey:* Mercer and Middlesex Counties, New Jersey; Bronx, Kings, Nassau, New York, Queens, Richmond, Suffolk and Westchester Counties, New York; Montgomery County, Pennsylvania
  - *Non-Urban counties outside Northern New Jersey:* Hunterdon, Monmouth and Somerset Counties, New Jersey; Dutchess, Orange, Putnam, Rockland, Sullivan and Ulster Counties, New York; Berks, Bucks, Lackawanna, Lehigh and Northampton Counties, Pennsylvania; Fairfield County, Connecticut

### Survey Results

**EAR Participation Rates, any geography**

*Question:* I am going to read a list of recreational or leisure activities in which people might participate. After I read each one, tell me how often, if ever, you have participated in this activity in the past 12 months.

*Answer Options:* More than 5 times, 3 to 5 times, 1 or 2 times, Never, Don't Know

The EAR activities with highest participation include shopping (retail malls, outlet malls, Main Street districts, movies, outdoor recreation activities, and visiting ethnic neighborhoods. Figure 29 presents a summary of respondents' frequency of participation in EAR activities, in descending order. RL Repass identified minimal "statistically significant" differences among the four geographic areas in terms of high frequency of participation (more than 5 times) in the EAR activities.

**Figure 29: EAR Activity Frequency of Participation, All Respondents**

EAR Activity	More than 5 times	3 to 5 times	1 or 2 times	Never	Don't Know	Total
Visited a regional retail shoppingmall or outlet mall	51%	18%	20%	11%		100%
Visited a traditional Main Street shopping district	42%	21%	20%	16%	1%	100%
Went to a movie theatre	34%	21%	22%	23%		100%
Went skiing, golfing, sailing, or other outdoor recreational activity	26%	16%	14%	44%		100%
Visited an ethnic or international neighborhood	23%	10%	21%	43%	3%	100%
Participated in an eco-tourism activity	21%	14%	17%	47%	1%	100%
Attended a professional sporting event	13%	11%	28%	47%	1%	100%
Attended a live music performance	12%	22%	29%	37%		100%
Visited a historic park, monument, or building	12%	20%	37%	30%	1%	100%
Attended a play or live performance, other than music or dance	8%	15%	33%	43%	1%	100%
Attended a festival or fair that featured crafts, art, food	8%	21%	45%	26%		100%
Visited a science, culture, or history museum or exhibit	7%	17%	40%	36%		100%
Visited an art gallery or art museum	5%	11%	32%	51%	1%	100%
Participated in an agri-tourism activity	4%	7%	29%	59%	1%	100%
Attended professional dance	3%	20%	14%	63%		100%
Visited a winery	3%	4%	18%	75%		100%
Visited an amusement park	3%	11%	31%	54%	1%	100%

Source: RL Repass; ERA | AECOM

**EAR Participation in Northern NJ**

*Question:* In the past 12 months, have you visited Northern New Jersey for sightseeing, leisure activities, entertainment, recreational activities, arts, cultural or sports activities, or not?

As expected, the majority of residents in Northern NJ participated in an EAR activity in Northern NJ over the past 12 months. Non-urban county residents exhibited a higher rate, 83 percent, versus urban county residents at 66 percent. Outside of Northern NJ, only a minority of residents participated in an EAR activity in Northern NJ over the past 12 months. Urban county residents

outside Northern NJ participated at a slightly higher level, 31 percent, versus non-urban county residents outside Northern NJ. Figure 30 presents the participation rates by region.

**Figure 30: EAR Participation in Northern NJ**

Region	Yes
Non-Urban Counties in North Jersey	83%
Urban Counties in North Jersey	66%
Non-Urban Counties Outside North Jersey	27%
Urban Counties Outside North Jersey	31%

Source: RL Repass; ERA | AECOM

***Likelihood of Attending EAR Activity in Northern NJ***

*Question:* I would like you to think about recreational and cultural activities currently available in Northern New Jersey. I am going to read a list of activities, please tell me how likely you would be to attend the following types of activities in Northern New Jersey.

*Answer Options:* Very likely, Somewhat likely, Neither likely nor unlikely, Somewhat unlikely, Very unlikely

Residents of Northern NJ

As expected, Northern NJ residents are most likely to attend restaurants, malls, movie theaters, museums, and live theatre in Northern NJ. Non-urban residents of Northern NJ are more likely to attend all activities on the list except for museums, live theatre, ethnic neighborhoods, amusement parks, live music/symphony, parks/outdoor areas, and art galleries. Figure 31 presents the likelihood of Northern NJ residents attending an EAR activity in Northern NJ.

Residents outside Northern NJ

In terms of likelihood of attending an EAR activity in Northern NJ, the most likely activities include restaurants, malls, museums, sports, live theatre, amusement parks, and outdoor activities. Urban residents outside Northern NJ are more likely to attend all activities in Northern NJ compared to non-urban residents except for live music, agritourism, or parks/outdoor/areas. Figure 32 presents the likelihood of residents *outside* Northern NJ attending an EAR activity in Northern NJ.

**Figure 31: Likelihood of Attending EAR Activity in Northern NJ (Residents of Northern NJ)**

EAR Activity	NNJ Residents	
	Non Urban	Urban
Restaurants	94%	89%
Retail shopping malls	88%	83%
Movie Theaters	78%	78%
Outlet malls	79%	74%
Museums	64%	70%
Live theatre such as stage plays or musicals	57%	62%
Eco-tourism such as hiking, biking, bird watching and wildlife viewing	68%	47%
Traditional Main Street shopping districts	62%	52%
Major-league or minor-league sports	62%	50%
Ethnic neighborhoods	55%	56%
Bars, clubs, comedy and other nightlife entertainment	55%	53%
Amusement parks	52%	53%
Skiing, golfing, sailing or other outdoor recreational activity	62%	41%
Symphony, opera or other live music event	48%	50%
Agri-tourism such as agriculture or farm tours, hay rides, cornfield mazes	65%	31%
National, state, regional or city parks or other outdoor recreation areas	46%	48%
Art galleries and studios	43%	48%
Wineries	46%	37%
Dance performances	34%	30%
Historic landmarks and sites	32%	20%

Source: RL Repass; ERA | AECOM

<sup>1</sup> Figures represent percentage of respondents selecting "very likely" or "somewhat likely"

**Figure 32: Likelihood of Attending EAR Activity in NNJ (Residents Outside NNJ)**

EAR Activity	Outside NNJ Residents	
	Non Urban	Urban
Restaurants	40%	47%
Retail shopping malls	38%	44%
Outlet malls	35%	38%
Museums	31%	40%
Major-league or minor-league sports	27%	39%
Live theatre such as stage plays or musicals	22%	41%
Amusement parks	27%	36%
Skiing, golfing, sailing or other outdoor recreational activity	30%	33%
Eco-tourism such as hiking, biking, bird watching and wildlife viewing	24%	29%
Symphony, opera or other live music event	27%	26%
Movie Theaters	22%	28%
Ethnic neighborhoods	18%	29%
Art galleries and studios	21%	24%
Bars, clubs, comedy and other nightlife entertainment	20%	23%
Wineries	20%	23%
Dance performances	15%	21%
Agri-tourism such as agriculture or farm tours, hay rides, cornfield mazes	18%	17%
National, state, regional or city parks or other outdoor recreation areas	16%	15%
Traditional Main Street shopping districts	8%	20%
Historic landmarks and sites	6%	18%

Source: RL Repass; ERA | AECOM

**EAR Participation Rates in Northern NJ**

*Question:* I am going to read a list of activities and attractions available in Northern New Jersey. After I read each one, tell me how often, if ever, you have visited this type of attraction in the past 12 months.

*Answer Options:* More than 5 times, 3 to 5 times, 1 or 2 times, Never, Don't Know

Survey results are provided in the appendix.

**Identification of EAR Activities Attended in Northern NJ (Free Response)**

*Question:* What are the names of some of the recreational or entertainment events or places in Northern New Jersey that you have frequently visited?

Survey participants identified parks with the most frequency. Performance venues, NJPAC and Paper Mill Playhouse, received the next most frequent identification. Other significant responses

include major venues (i.e. Prudential Center, Giants Stadium) and museums (Morris Museum, Newark Museum). Participants also noted natural areas (i.e. Liberty State Park, Meadowlands, and Delaware Water Gap) with frequency. Participants also incorrectly identified EAR activities outside Northern NJ such as Six Flags and PNC Bank Arts Center. Figure 33 provides a table of the activities with most frequent responses.

**Figure 33: Identification of EAR Activities in Northern NJ**

<b>Attraction</b>	<b>Count</b>
Parks	26
New Jersey PAC	15
Paper Mill Playhouse	14
Prudential Center	11
Liberty State Park	10
Meadowlands	8
Delaware Water Gap	6
Giants Stadium	6
IZOD Center	6
Bergen PAC	5
Land of Make Believe	5
Liberty Science Center	5
Morris Museum	5
Newark Museum	5
PNC Bank Arts Center	5
Rockaway Mall	5
Six Flags	5
Skylands Ballpark	5
Stokes Forest State Park	5

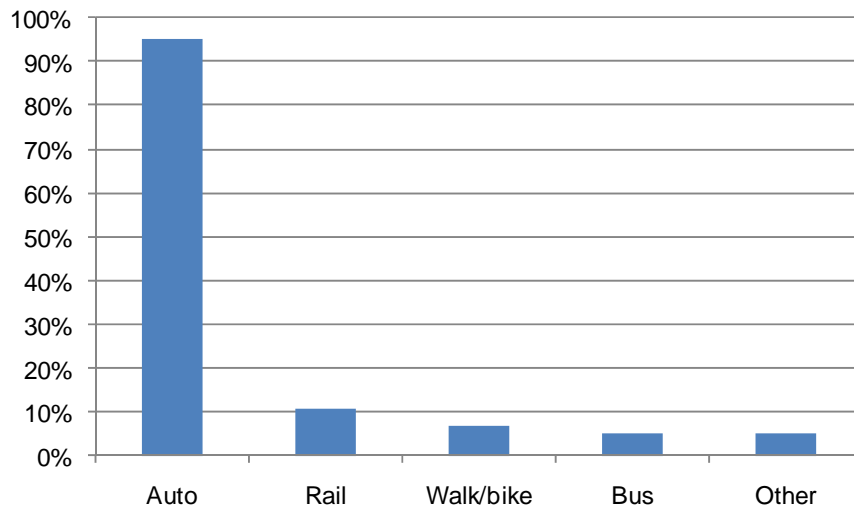
Source: RL Repass; ERA | AECOM

***Transportation Choices visiting Northern NJ***

*Question:* When you attend entertainment, arts, or recreational activities in Northern New Jersey, what forms of transportation do you use? Any others?

The vast majority, 95 percent, of visitors used an automobile to visit an EAR activity in Northern NJ. However, 23 percent also used public transit, biked, or walked for some part of their EAR activity. Figure 34 presents the survey results as a chart.

**Figure 34: Transportation Choices for EAR Activity in Northern NJ**



**Overnight Stays**

*Question:* Did any of these entertainment, arts, recreational activities include an overnight stay in Northern New Jersey, or not? What type of accommodations did you use? Any others?

The survey indicates that most EAR visits do not involve an overnight stay. 83 percent of Northern NJ EAR visitors made a day trip while 16 percent stayed overnight. Those that do stay overnight mostly stay at family or friends (36 percent) and hotels (34 percent).

**Demographics**

*Question:* What is the highest level of formal education that you have had an opportunity to complete?

Of all respondents, 55 percent had a bachelor’s degree or higher. Only 18 percent achieved a high school degree or less as their highest level.

*Question:* What is your total household income before taxes?

Of the respondents that chose to answer the question (84 percent of all respondents), 60 percent earned more than \$75,000 in household income. 14 percent of respondents earned less than \$35,000.

*Question:* Including yourself and any children, how many people are currently living in your household?

Of the respondents that chose to answer the question (98 percent of all respondents), only 10 percent were part of a one-person household. 29 percent of respondents were part of two-person

households, 20 percent part of three-person households, and 41 percent part of households with more than 4 persons.

*Question:* Which of the following best describes your marital status?

The majority of respondents were married, 64 percent. The second most frequent answer, 18 percent of respondents, was “never married.” One percent of respondents chose not to answer the question

*Question:* Which of the following best describes your race or ethnic background?

The majority of respondents, 82 percent, described themselves as White. The second most frequent response was African-American at five percent. Hispanic/Latino respondents made up four percent while Asian made up three percent. Five percent responded as “Something else” while two percent chose not to answer the question.

*Question:* Which of the following best describes your employment?

Half of the respondents were employed full-time. The next largest response was retired, at 15 percent of respondents. Part-time employees made up nine percent of respondents, homemakers made up eight percent, and students made up six percent. Two percent of respondents chose not to answer the question.

*Question:* Gender

51 percent of respondents were female and 49 percent male.

*Question:* Into which of the following categories does your age happen to fall?

31 percent of respondents were 55 and older, 41 percent between 35 and 54, and 27 percent between 18 and 34 years old.

## **F. Stakeholder Workshops**

**Agendas**

**Notes**



## AGENDA

### NORTH JERSEY PARTNERS CREATIVE COMMUNITY COLLABORATIVE

#### Advisory Committee Meeting

Tuesday, June 2, 2009

	min
1. Overview ( <i>E. Hutton</i> )	15
2. Progress to Date ( <i>W. Owens, T. Shoham</i> )	25
<ul style="list-style-type: none"><li>• Review Scope of Work</li><li>• Literature Review</li><li>• Inventory</li><li>• Survey</li></ul>	
3. Workshop Discussion ( <i>ERA Team</i> )	40
<ul style="list-style-type: none"><li>• Mission Statement (10 min)</li><li>• Regional Definition/ Branding Opportunities (15 min) Given disparate geographic nature of region, what are promotional/ branding options we should examine? Should the eight-county region be considered as a whole, or should it be subdivided based on characteristics and thematic linkages?</li><li>• Organizational Capacity (15 min) Given disparate existing administrative structures in region, what are organizational/ funding options we should examine?</li></ul>	
4. Conclusions/ Next steps ( <i>ERA Team</i> )	10
<ul style="list-style-type: none"><li>• Stakeholder Workshops</li><li>• Monthly Conference Calls</li><li>• Other study issues to consider</li></ul>	



## AGENDA

### NORTH JERSEY PARTNERS CREATIVE COMMUNITY COLLABORATIVE

#### Stakeholder Committee Meeting

Tuesday, June 2, 2009

	min
1. WIRED Initiative Framework ( <i>T. Mitchell, P. Oppenheimer</i> )	10
2. Stakeholder Committee Meeting Overview ( <i>E. Hutton</i> )	5
3. Progress to Date ( <i>W. Owens, T. Shoham</i> )	20
<ul style="list-style-type: none"><li>• Review Scope of Work</li><li>• Literature Review</li><li>• Inventory</li></ul>	
4. Sub-group Workshops ( <i>ERA Team</i> )	65
<ul style="list-style-type: none"><li>• Introduction and Sector Category Definitions<ul style="list-style-type: none"><li>– Entertainment/ Popular Attractions</li><li>– Arts/ Cultural Attractions</li><li>– Retail/ Support Facilities</li></ul></li><li>• Sub-group Workshop Discussion Given the information presented and your knowledge of your county or specialty, what are the strengths, weaknesses, opportunities and threats of each of the following plan components:<ul style="list-style-type: none"><li>– Products</li><li>– Services</li><li>– Infrastructure</li><li>– Organization</li><li>– Funding</li><li>– Branding</li></ul></li></ul>	
5. Large Group Recap ( <i>ERA Team</i> )	40
<ul style="list-style-type: none"><li>• Report back results of each group's workshop</li><li>• Discussion: What are common themes, conflicts, and/or implications for the ongoing study?</li></ul>	
6. Conclusions/ Next steps ( <i>ERA Team</i> )	10



## AGENDA

### NORTH JERSEY PARTNERS CREATIVE COMMUNITY COLLABORATIVE

#### Advisory Committee Meeting

Monday, July 20, 2009

	min
1. Overview ( <i>E. Hutton</i> )	5
2. Progress to Date ( <i>W. Owens, T. Shoham</i> )	25
<ul style="list-style-type: none"><li>• Review Scope of Work</li><li>• Interim Conclusions<ul style="list-style-type: none"><li>– SWOT Analysis Summary</li><li>– Survey Results</li><li>– Organizational Framework</li><li>– DMO Funding</li><li>– Regional/ Local Strategic Initiatives</li></ul></li></ul>	
3. Workshop Discussion ( <i>ERA Team</i> )	50
<ul style="list-style-type: none"><li>• Regional Activity - North Jersey (25min)<ul style="list-style-type: none"><li>– Role/ tasks at the regional level</li><li>– Umbrella group, not separate bureaucratic entity</li><li>– Need for staffing presence</li><li>– Funding opportunities separate from State</li></ul></li><li>• DMO/ CVB Activity (25 min)<ul style="list-style-type: none"><li>– Series of locally-focused organizations/ relationship to counties</li><li>– Stable stream of income through State</li><li>– Focus on local initiatives- product, events</li></ul></li></ul>	
4. Conclusions/ Next steps ( <i>ERA Team</i> )	10
<ul style="list-style-type: none"><li>• Project report- outline/ process</li><li>• Stakeholder Workshop</li></ul>	



## AGENDA

### NORTH JERSEY PARTNERS CREATIVE COMMUNITY COLLABORATIVE

#### Stakeholder Committee Meeting

Monday, July 20, 2009

	min
1. Stakeholder Committee Meeting Overview ( <i>E. Hutton</i> )	5
2. Progress to Date ( <i>W. Owens, T. Shoham</i> )	20
<ul style="list-style-type: none"><li>• Review Scope of Work</li><li>• Interim Conclusions<ul style="list-style-type: none"><li>– SWOT Analysis Summary</li><li>– Regional/ Local Strategic Initiatives</li></ul></li></ul>	
3. Small Group Workshops ( <i>ERA Team</i> )	65
<ul style="list-style-type: none"><li>• Introduction (5)</li><li>• Small Group Workshops (60)<ul style="list-style-type: none"><li>– Products appropriate to each tier<ul style="list-style-type: none"><li>▪ State of New Jersey as a whole</li><li>▪ Regional (8-co North Jersey)</li><li>▪ DMO/ county</li></ul></li><li>– Implement agents<ul style="list-style-type: none"><li>▪ Public sector actors (at what level?)</li><li>▪ Not for profit (DMO/ CVB etc)</li><li>▪ Institutional (education/ cultural organizations)</li><li>▪ Private sector</li></ul></li><li>– Time frame for implementation<ul style="list-style-type: none"><li>▪ ST- can do with existing resources, organizations</li><li>▪ MT- needs planning, org</li><li>▪ LT- needs improvements, infrastructure, services</li></ul></li><li>– Prioritize products</li></ul></li></ul>	
4. Large Group Recap ( <i>ERA Team</i> )	40
<ul style="list-style-type: none"><li>• Report back results of each group's workshop</li><li>• Discussion: What are common themes, conflicts, and/or implications for the ongoing study?</li></ul>	
5. Conclusions/ Next steps ( <i>ERA Team</i> )	10