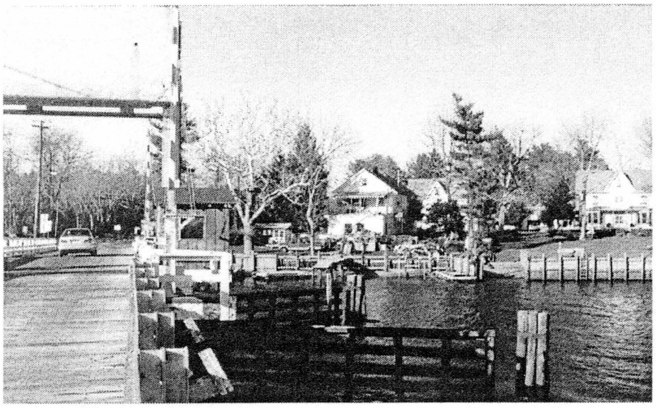
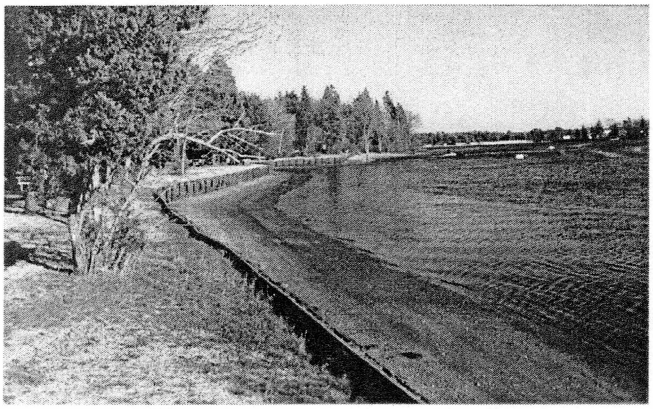
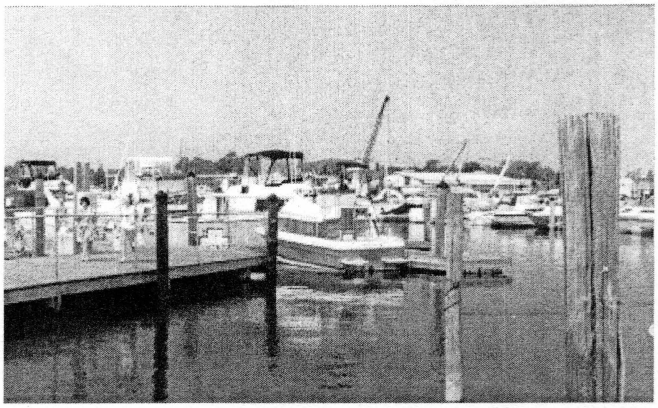
Pinelands
Rural Economic Development Pilot Program



MULLICA RIVER PRESERVATION CORRIDOR

TOURISM ANALYSIS & STRATEGIC DIRECTIONS

Final Report

Whiteman & Taintor

February 2000

CONTENTS

TABLES

What is it that these Pinelands communities wish to gain from tourism development? Based on interviews and workshops with the study communities, the following six objectives were defined. These objectives are largely compatible with each of the study communities; where differences exist, they are noted.

OBJECTIVE 1 — STRENGTHEN LOCAL BUSINESSES BY ACHIEVING A 20% INCREASE IN RETAIL SALES OVER FIVE YEARS

The retail bases in these communities need strengthening; tourism can be one avenue to attain stronger and more stable retail and service sectors. Table 1 indicates the annual number of tourists required to reach a 20% increase in retail sales in each community. For the purposes of this project, a 20% increase in sales beyond inflation is assumed to be a reasonable goal for a five year time period (i.e., 4-5% per year). Average expenditures per tourist are decreased from statewide figures from the New Jersey Tourism Department. The lower expenditure figure acknowledges the lower levels of eating, lodging, shopping and paid tourism experiences currently available in the target communities.

Table 1:
Numbers of Tourists Needed to Achieve 20% Increase in Sales Base for Project Communities

Study Area	Est. 1998 Sales Tourism Sector*	20% Sales Increase from 1998 Base	Average Expenditure per Tourist *	# of New Tourists in Five Years to Meet Goal
Mullica River Corridor	$6,000,000	$1,200,000	$25	48,000

* Tourism related retail and service sales were estimated from 1992 Census of Retail Trade data and from business listings from the American Business Information, Inc. for the communities within each of the study townships and boroughs. Data was often withheld in the sources due to the small number of businesses. These figures represent conservative estimates based on the available data. The communities are also combined due to variations in data collection by the U.S. Government and ABI; some data are collected by municipality and other by zip code.
* Average 1997 day trip per person expenditures for New Jersey tourists is $71.00. This figure was decreased to $25 per day to acknowledge the relatively underdeveloped nature of the tourism economy in the study communities.

OBJECTIVE 2 — DRAW SUFFICIENT NUMBERS OF VISITORS TO REACH SALES OBJECTIVES WITHOUT COMPROMISING COMMUNITY CHARACTER

Table 2 presents the numbers of visitors—in persons and in groups traveling by car—which will need to be drawn to the study communities to reach the sales objectives described in Objective 1. These figures are based only on the assumptions presented above; they do not reflect questions of whether the natural resource base or road system of the communities can support this much activity. A review of existing traffic data on

The question of whether these levels of impact will damage local natural resources is complex and will be reviewed as the strategy takes a more defined shape in the months ahead. For the purposes of this stage of the project, it will be assumed that visitation at these levels dispersed through the target communities will not cause harm.

Table 2:
Number of Visitors and Cars Needed to Meet Visitation and Sales Objectives

	Annual Visitation Targets	# of Visitors per Peak Season Month*	# of Visitors per Shoulder Season Month*	# of Cars per Peak Season Month**	# of Cars per Shoulder Season Month**
Allocation Factors		70%	30%	3.5	3.5
Mullica River Corridor	48,000	8,400	3,600	2,400	1,029

* Peak season is defined as June through September. 70% of the visitors are allocated to these four months. Shoulder seasons are the months of April, May, October and November.
** 3.5 persons per group is used as the average number of persons in each car.

While there are no formal counts taken of current visitation to the study area, visitation to local state forests offer a proxy. Bass River State Forest and Wharton State Forest record attendance figures for both daytime visitors and overnight guests. The number of daytime visitors are recorded via toll booth counts at the entrance of the forests during peak season (Memorial Day through Labor Day) and are estimated during the off season months. Overnight guests must log in, and are counted year round. In 1998, Bass River had 68,957 daytime visitors. Wharton State Forest reported 680,261 daytime visitors for 1998. Table 3 presents daytime and overnight visitation figures for the forests in 1998.

Table 3:
1998 State Forest Visitation

	Day Visitors	Overnight Visitors
Bass River State Forest	68,957	43,846
Wharton State Forest	680,261	17,002

Source: Telephone calls to Bass River and Wharton State Forests.
Note: These figures do not include visitors to "out areas" managed by the units, such as Batsto Historical Village (Wharton State Forest).

Existing total visitation levels at Wharton State Forest are substantially higher than at nearby Bass River State Forest, but the impacts on the Pilot Program communities are probably not proportional to these levels. Wharton is much larger than Bass River State Forest (172 square miles compared to 40 square miles), and it extends 15 to 20 miles north and west of the Green Bank–Sweetwater area along the River. As a result, substantial portions of Wharton State Forest are much closer to centers such as Hammonton and Medford than to the Pilot Program towns, and the Mullica River Corridor communities overlap only a portion of the visitor market for this State Forest. Assuming that visitation in the portion that is oriented most closely to the Pilot Program communities represents one-third of total visitation figures for Wharton State Forest, existing visita-

These figures suggest the following conclusions:

- The targeted increase in visitation to the Mullica River Corridor (48,000 additional annual visitors) is equal to 70% of the existing day use visitation to the Bass River State Forest and 21% of the existing day use visitation to Wharton State Forest.

  Day use visitations overstate the number of visitors within an area since they represent the number of persons entering the forest on each day and thus repetitive visits by a person or family during their time in the area will be recorded as multiple visits. The best way to translate these data into a useful measure of how much the targeted visitation figures will increase use over current levels is to think in terms of the current versus projected *daily visitation levels*. In other words, on a given day, how will the additional tourists increase the level of activity in an area. In the case of Wharton State Forest, dividing the estimated total annual day use level of 227,000 visitors in the area related to the Pilot Program townships by 100 peak season park days results in an estimate of 2,270 persons per day being active in the Mullica River Corridor and visiting the State Forest. For the Bass River State Forest, current peak daily levels are 689. Assuming that there is no overlap between visitation at these two facilities, then there are approximately 3,000 people each summer day using the State Forests. The addition of another 480 new visitors (48,000 divided by 100 peak season days) equates to a 16% increase in daily visitation levels.

As noted elsewhere in this report, economic success will require more than just attracting more people; the key is to increase expenditures at local businesses. The strategy for each area should look first to how to increase expenditures by current passersby and visitors and then to attracting new visitors.

OBJECTIVE 3 — INCREASE PROPERTY TAX RATABLES

This objective translates to the need for additional real estate development, as this is the source of property tax revenues. At the current budget and tax rate levels of these communities, Table 4 provides a sense of the amount of additional property value that will be needed to have various levels of impact in the communities. For most of the study towns, at least $10 million in new development will be needed before there is a significant impact on the amount of additional tax revenue available to the community. Obviously, this level of development will not happen overnight. Therefore, a preliminary target is set to generate a minimum of $2 million in new investment over each of the next five years.

It should be noted, however, that a primary objective for all the communities is the protection of local cultural and environmental character. The amount of development implied by a $2 million objective per year (e.g., an average 40 room chain motel has a value of between $1 and $2 million), may not be appropriate for each community. Therefore, these figures will be used to explore the types and resulting impacts of development that might be appropriate for each place. Each community, however, must ultimately decide how much development is desired.

at Varying Levels of New Investment

Community	Total 1998 Property Tax Revenue	Tax Rate	$ and % Increase in Revenue Base at Three Levels of Additional Property Tax Revenue Generated from New Development*					
			$1 Million Investment		$5 Million Investment		$10 Million Investment	
			$ increase	% increase	$ increase	% increase	$ increase	% increase
Mullica	5,031,160	0.0252	25,200	0.50%	126,000	2.50%	252,000	5.01%
Washington**	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Bass River	1,800,690	0.0264	26,400	1.47%	132,000	7.33%	264,000	14.66%

* These calculations assume that the assessed value of new development is approximately 100% of market value.
** Due to the part-time schedule of Washington Township's offices, figures were not obtained.

Objective 4 — Address Wastewater Disposal Problems

All the communities face the challenge of trying to encourage business investment while maintaining the water quality that is key to area tourist attractions (and also meets water quality standards). New Gretna, and to a lesser extent, the other Mullica River Corridor communities—all face existing wastewater disposal problems that need to be addressed.

An integrated economic development strategy, which includes tourism as one facet, will offer a path to installing or expanding limited wastewater treatment facilities in each community. These communities wish to find the financial and technical means to address the following wastewater challenges:

- Mullica Township (Sweetwater area and other riverside locations): Mullica has little interest in a sewer system along the river, but the Township would like to improve water quality and address the problems of existing businesses in that area. (Note: Mullica *is* interested in a wastewater treatment solution for the Route 30 corridor, but that issue is addressed in another portion of this Pilot Project.)

- Washington Township: The businesses in Green Bank and Lower Bank all need either regulatory or technical assistance regarding wastewater treatment. The current lot size requirements and on-site septic systems place severe constraints on the ability of these businesses to grow.

- Bass River Township: New Gretna is an area in need of some type of wastewater treatment; there is little interest in extending such a system to any other parts of the Township. New Gretna's school and several larger local businesses all have, or may have in the future, wastewater disposal problems that could be addressed through a small treatment system.

These wastewater objectives are described here because they each imply a different type of development pattern and scale of need. These factors will have a direct impact on the type of tourism strategy that each community can follow.

Objective 5 — Encourage Other Forms of Economic Development

Tourism can play a role in increasing the overall awareness of a place. This has positive benefits for other types of economic development. The following are community-specific development objectives that might be achieved in conjunction with a tourism strategy.

- Mullica Township–Sweetwater: This community does not wish to significantly expand business within the river corridor, although existing businesses would like more customers. If the corridor strategy can increase awareness of the Township's Route 30 land and site resources, then it will assist the broader strategy.
- Washington Township: Use tourism to create a more stable base for the existing businesses and expand the season. Encourage visitors to consider taking up residence—full or part time—in the township as a way to build the local consumer market.
- Bass River Township: Use tourism to generally attract small businesses and shops to New Gretna. This will have other economic spin-off benefits.

Objective 6 — Assist with Community Renewal

This objective is specific to New Gretna. There is a need for reinvestment to provide a stronger downtown, improve the appearance of the community and strengthen the image of the township. Tourism can play a role in this process.

III. TOURISM STATUS

Where do the study communities stand today regarding their level of tourism development? This section explores the status of tourism from the perspectives of image, assets, and impacts. In addition, while the Pilot Program is focusing on a specific set of rural communities within the larger Pinelands area, that larger region cannot be ignored when planning for tourism. The image of the surrounding Pinelands region has an impact on the image of each community. The region's level of development for visitors' services and amenities will also affect the way in which the Pilot Program communities can proceed with tourism.

IMAGE

The following comments regarding regional and local image are based on a content analysis of state and regional tourism office materials, published guidebooks to the region, interviews with tourism professionals within the Pinelands and at the state level, a review of material on the Internet and consulting team observations.

State Tourism Image Positioning

New Jersey State tourism officials work hard to get past timeworn stereotypes of the state as an urban place with overcrowded suburbanized sprawl, or a somewhat dilapidated gambling destination, as Atlantic City has been portrayed. There is much more to New Jersey, and state tourism advertising and marketing efforts attempt to convey that diversity.

A review of 1999 state tourism marketing materials and state-commissioned impact analyses prepared during 1998 identified the following highlight themes for the state's image and overall tourism marketing strategy:[1]

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[1] Promotional materials reviewed for this analysis included the following: 1999 Travel Guide for New Jersey; The New Jersey Outdoor Guide: What a Difference a State Makes; The New Jersey Fun Guide, 1998; South Jersey Promotional Material, 1999; ShoreCast: Atlantic City Magazine's Monthly Guide; The Discerning Travelers Guide to the Middle Atlantic States (Glickstein, 1997); Birding the Delaware Valley Region (Harding, 1980); New Jersey Coastal Heritage Trail Route (National Park Service, 1998); and numerous brochures from attractions throughout the region. In addition, state and local travel materials from all surrounding states and competitive areas were reviewed. The Web sites for all areas—in state and out of state—were also reviewed.

The research materials reviewed consisted of annual tourism impact and analysis work produced by Longwoods International for by the State of New Jersey. In addition, the Atlantic City and Cape May tourism offices also kindly shared their research materials with this project.

- The natural environment is the lead image projected for the coming summer's marketing effort in the state travel guide.

- The Back to Nature section of the travel guide emphasizes the state's open spaces, bird watching, hiking, rivers, biking and foliage. There is a deliberate effort to encourage visitors to explore New Jersey and travel around the state.

- The New Jersey Outdoor Guide is an example of special travel materials prepared for the ecotourism/outdoor enthusiasts target market. This publication tracks well with the Pinelands' offerings, but the lack of a map makes the process of choosing a destination or travel route quite difficult.

- Generally speaking, the major attractions emphasized in travel materials, via advertisements and in text, are Atlantic City and shore vacations. This emphasis is due to the self reinforcing impact of the popularity of these destinations combined with the advertising dollars spent by those popular destinations. Destinations seeking to rise above this promotional activity must find alternatives to general advertising in state tourism materials since small and new destinations will not carry the promotional weight of existing attractions.

- There is an impressive array of historical attractions in the state. Pinelands communities with historic resources should seek ways to affiliate themselves to the broader historical attractions.

Pinelands Tourism Image

The current tourism image of the Pinelands region can be summed up by the words *special, mysterious* and *poorly defined.* The word that best describes the area's image is largely a function of familiarity. Familiarity with the area results in positive images of either *uniqueness* and *solitude* or the negative images of *mystery* and *backwardness.* Those unfamiliar with the place most likely hold no image or a confused image of the region.

For those familiar with the positive aspects of the Pinelands, the region has an identity as a place with an intentional stewardship mission and as a place that is somehow different, set apart, or special. The large public land holdings, important ecosystems, water ways, solitude of the pine forests and history as a place where people went to have their own life or to avoid being found, all contribute to an image of a place that is different from the rest of the urbanizing region.

One source for information on the image of the Pinelands is contained within a 1994 poll by the Eagleton Institute at Rutgers University. The survey asked New Jersey residents about their familiarity with the Pinelands and the issues facing the region. Between 50% and 65% of the central and northern New Jersey residents knew "not much" or "nothing at all" about the Pinelands. When asked about the importance of the resources in the Pinelands, water quality and supply, and rare species were of far more importance to respondents than were the recreational opportunities (e.g., 78% cited groundwater as "very important," while just 32% gave the same importance to the recreational opportunities). From a tourism marketing perspective, these attitudes present an opportunity.

The Pinelands also has a negative image for an unknown number of persons who are at least familiar with the region's existence. For these people, the Pinelands is a place with a somewhat suspicious nature. It is a place to avoid breaking down on a dark night. It is a place with people who are different. These are old stereotypes and it is difficult to know the extent they still exist, but conversations with a few Northern New Jersey residents suggest that these images persist in the minds of some.

Finally, in terms of the image conveyed to the traveler unfamiliar with the Pinelands, the region rarely appears in published tourism guides. The region is promoted at the state level as somewhat of its own region, but is not given much weight or definition in promotional materials. Pinelands references in some marketing materials include:

- The Governor's greeting letter in the New Jersey summer travel guide referenced the Garden State as "home to the Pinelands, our country's first National Reserve and the largest wilderness tract east of the Mississippi River." The Pinelands is mentioned twice in the travel guide in reference to the Batona Trail and Pinelands rivers—the Maurice River and the Great Egg Harbor River.

- The Pinelands does not appear on State tourism maps as a distinct entity. Due to the area's size, it is split between three tourism regions: Delaware River Region, the Greater Atlantic City Region and the Southern Shore Region. In terms of this project's study areas, the Mullica River Corridor is split between the Delaware and the Atlantic City tourism regions. The state tourism map makes no reference to the Pinelands nor is it indicated on the map. This is a confusing contradiction to the Governor's invitation to visit "the largest wilderness area east of the Mississippi."

- The New Jersey Campground Association cite the Pinelands in its "near the shore, the rivers, the mountains and near the cities" advertisement which runs in state and regional promotional material.

Currently, from the average traveler's perspective, the Pinelands is a place that is mentioned and given a suggested importance, but it is hard to find and define. Maps do not show it, place names do not suggest it. For the traveler, there is little signage to indicate where it is located. There are exceptions to this. For example, published guides on canoeing the Pinelands, or materials from destinations such as Cumberland County, Wheaton Village or Batsto list activities for visitors to the region. Generally speaking, however, the region has a nonexistent or poorly defined image for the traveler. The image is also clouded by the nearby presence of two well-defined destinations: Cape May and Atlantic City. These two places send strong messages as destinations; it will be challenging for the Pinelands to project its own story.

Study Area Image

The Mullica River Corridor has similar image challenges. It is not defined as a place for the traveler, though the area has public lands and private businesses that are oriented toward the traveler. The Mullica River Corridor has a clear physiographic definition—the river. But the area has no image to the traveler. Sweetwater or Wharton State Forest or the campgrounds are familiar to some, but not to most travelers. The corridor as a whole has no image.

Tourism Assets

Assets are defined here as resources—either public or private—upon which the area can build a tourism economy. This section should not be interpreted as an exhaustive inventory, but rather as an illustrative review of resources either already existing in the study area or in nearby areas, or undeveloped resources upon which tourism can be strengthened.

Regional Tourism Resources and Destinations

The Pinelands and the immediately surrounding areas offer a range of tourism resources. The following is a general inventory of the tourism attractions that the average visitor will encounter during a trip through or to the study area. Some of these attractions may be direct competitors with study area strategies; others may be complementary resources that can be used to build study area product lines.

The Mullica River Corridor is shaped by its defining element—the river. If the definition of this resource is broadened to include the coast and the inland waters to Batsto (i.e., the Mullica River Watershed), then the river begins to have a fuller story to tell. Batsto, the Wharton State Forest, tidal marshes, the tradition of boatbuilding, and the Colonial and Revolutionary War history all give the corridor some unity and definition for both residents and travelers. The scenic drives along the river punctuated by small villages, scenic views and hidden restaurants lend strength to the idea of encouraging visitors to make the corridor a driving loop.

Some of the specific resources along the corridor include the following:

- Batona Trail
- Batsto Historic Village
- Cranberry farms
- Edwin Forsythe National Wildlife Refuge
- Historic Villages (e.g., New Gretna, Green Bank, Lower Bank)
- New Gretna House
- Port Republic WMA
- Renault Glass Museum and Winery (oldest in the US),
- Several marinas (e.g., New Gretna)
- Several Yacht and Boat Manufacturers (e.g., Viking Yacht)
- Swan Bay WMA
- Sweetwater restaurants
- Tuckahoe WMA
- Tuckerton Village Seaport
- Wharton State Forest (Green Bank Section)

Resources in the Area Surrounding the Mullica River Corridor

- Abescon WMA
- Abescon Lighthouse
- Atlantic City casinos...13 at last count,
- Atlantic City Boardwalk,
- Atlantic County Community College's restaurant (open to the public)
- Bass River State Forest
- Carranza Memorial
- Golf courses—numerous
- Green Bay Blvd. WMA
- Hammonton Creek WMA
- Hammonton Lake Natural Area
- Historic Districts (e.g., Egg Harbor City, Hammonton)
- Mystic Island
- North Brigantine Natural Area
- Resorts—numerous vacation and golf resorts
- Richard Stockton College of NJ (including performing arts center)
- Sea Life Museum-Marine Mammal Stranding Center,
- Senator Frank S. Farley State Marina
- Shore communities such as Morgate and Ocean City
- Six Flags Amusement Park
- Smithville
- Story Book Land
- US Coast Guard Station, Atlantic City
- Wharton State Forest

Existing Tourism Efforts

Interpretation and Marketing

New Jersey Coastal Heritage Trail: The New Jersey Coastal Heritage Trail (NJCHT) was established in 1988 "to provide for public appreciation, education, understanding, and enjoyment" of significant natural and cultural sites associated with the coastal area of New Jersey. The NJCHT is a cooperative project of the State of New Jersey and the National Park Service, and is organized around three themes: Maritime History, Coastal Habitats, and Wildlife. Sites and points of interest along the Coastal Heritage Trail have interpretive exhibits explaining their relevance to the Trail themes. New Gretna is part of the Barnegat Bay Region.[2] A Regional Welcome Center for the Trail is located at the Ocean View Service Center on the Garden State Parkway.

Batsto Village: Under the management of New Jersey State Parks and Forests Department, Batsto Village is a historic park that presents structures and artifacts from the early settlement of the Pinelands region. Buildings were moved from a variety of loca-

[2] The Mullica River is the boundary between the NJCHT's Barnegat Bay and Absecon Regions.

tions to create this historical attraction. Over the years, as the Parks Department has lost funding, the Batsto facility has gradually been scaled back. While still open to the public, interpretation, staffing and programming is limited. If this facility can be reinvigorated, it could play an important part in the tourism strategy for the Mullica River Corridor.

Pinelands Interpretive Program: The Pinelands Interpretive Plan was developed by the Pinelands Commission in partnership with the New Jersey Department of Environmental Protection and the National Park Service. The Plan includes objectives for interpretive facility development and coordination, exhibits and signage, and materials and publications.

Current Projects

Tuckerton Seaport: This new facility is nearing completion. It is located in Tuckerton, several miles outside the township of Bass River, but is mentioned here due to its potential importance as a tourism anchor that could be affiliated with the Mullica River effort. The Seaport's projections are that 300,000 persons a year will visit this replica seafishing village and its restored boats. In addition to the Village, Tuckerton is also host to the Baymen's Museum, a facility that interprets the lives and crafts of the people of South Jersey who make their living from the sea.

IMPACTS

Another perspective on the current status of tourism in a place is to examine the impacts from that industry on the local economy. Data were gathered from the New Jersey Tourism Department, state economic data sources, regional destinations and publicly available business files to develop the following profiles.

Tourism is a significant industry for the State of New Jersey. Total tourism economic activity for the State is estimated to be $25 billion with 623,000 jobs and $3.17 billion in taxes paid (see Table 5).

Table 5:
1997 Statewide Travel and Tourism Expenditures

TOTAL EXPENDITURES BY:	$ Billions	%
TYPE OF TRIP		
Day Trips	8.6	34
Overnight Trips	15.4	60
Pass Through	1.4	6
SECTOR		
Restaurant	7.5	29
Retail	6	24
Gaming	3.6	14
Automobile	3.3	13
Lodging	3.2	13
Recreation	1.6	6
Local Transportation	0.2	1
PLACE OF RESIDENCE		
New Jersey	8.8	35
Other States	16.7	65
BUSINESS vs. PLEASURE		
Business	4	16
Pleasure	21.5	84

Total 1997 Expenditures = $25.5 Billion

Source: Center for Survey and Marketing Research, Longwoods International (4th quarter data estimated), from the New Jersey Office of Travel and Tourism

As shown in Table 5, overnight trips generated 60% of total tourism expenditures. Restaurant sales grossed over $7 billion and led other travel-related sectors. Visitors from other states spent 65% of the total expenditures. Finally, the pleasure travel market far surpasses the business market in the state.

During 1997, 120 million persons took day trips to the state; 40.8 million persons took overnight trips (see Table 6).

Table 6:
Size of New Jersey's Travel Market, 1997

	Estimated Trips	
	# in Millions	%
DAY TRIPS		
Business	12.6	10%
Pleasure	107.5	90%
Total	120.1	100%
OVERNIGHT TRIPS		
Business	6.2	15%
Pleasure	34.6	85%
Total	40.8	100%

* Estimated person trips by adults 18+ who are residents of the US excluding Alaska and Hawaii. A "trip" is defined as any trip outside your own community that is not part of your normal routine.
Source: Longwoods International, May 1998, from the New Jersey Office of Travel and Tourism

Table 7 indicates that per person expenditures per day range from $71 to $113.

Table 7:
1997 Travel and Tourism per Person Expenditures

Total 1997 Expenditures = $25.5 Billion

Per Person* Expenditures	Entire Trip	Per Day**
Day Trips	$71	$71
Overnight Trips	$397	$113
Day and Overnight Trips	$151	$82

* Per adult member of the travel party
** Average length of stay was 3.5 nights on overnight trips
Source: Center for Survey and Marketing Research, Longwoods International (4th quarter data estimated) From the New Jersey Office of Travel and Tourism

Pinelands counties' tourism economies vary greatly. Atlantic County and Cape May County are the top two tourism economies in the state. Cumberland and Gloucester rank among the lowest; Burlington is within the mid range. Generally speaking, inland Pinelands communities garner little benefit from tourism today. Table 8 indicates travel and tourism expenditures by county in the state. Table 9 presents data on jobs, payroll and taxes generated by tourism. Of particular note in the expenditure data is the exceptionally low lodging and recreation figures for Cumberland and Gloucester counties. Burlington County's urbanized areas toward Trenton cause its eating and retail figures to be quite high. As of 1997, there were just 5500 tourism jobs in Cumberland County—most of which fall within the greater Vineland area.

For the purpose of future comparison, Atlantic County generates $66,452 in expenditures for each tourism job compared with Cape May County's figure of $59,794. Statewide, each dollar of tourism expenditure generated $17 in local taxes. In Cape May

County, that figure was $21; for Atlantic County the expenditure to tax ratio was $14. Statewide, each tourism job resulted in the creation of over $2330 in local taxes.

Table 8:
1997 Travel and Tourism Expenditures by County*

	Total	Gaming	Restaurant	Retail	Lodging	Automobile	Recreation	Local Transportation
	($ Billions)	($ Billions)	($ Millions)	($ Millions)	($ Millions)	($ Millions)	($ Millions)	($ Millions)
Pinelands Counties**								
Atlantic	8.24	3.62	1,547	1,082	899	726	314	56
Burlington	0.81		290	259	60	127	66	7
Camden	0.76		281	249	44	118	59	7
Cape May	2.32		646	478	763	277	140	18
Cumberland	0.14		57	45	9	22	10	1
Gloucester	0.25		99	83	10	38	19	2
Ocean	1.73		534	536	267	242	140	10
Other NJ Counties								
Bergen	1.62		598	440	206	248	108	18
Essex	1.33		495	367	158	203	89	15
Hudson	0.81		311	233	79	123	56	9
Hunterdon	0.15		59	47	12	24	12	1
Mercer	0.82		287	264	66	130	67	7
Middlesex	1.29		476	349	168	198	86	15
Monmouth	1.68		559	577	118	263	146	12
Morris	1.15		406	334	135	181	86	12
Passaic	0.42		171	134	22	63	29	4
Salem	0.09		36	30	5	15	8	1
Somerset	0.61		216	178	68	95	45	6
Sussex	0.28		103	80	29	44	22	3
Union	0.82		307	228	94	125	55	9
Warren	0.14		54	43	11	22	11	1
State Total	25.46	3.62	7,532	6,036	13,568	3,284	1,568	4,852

Note: Numbers may not sum to total due to rounding. 4th quarter data are estimated
Source: Center for Survey and Marketing Research From New Jersey Office of Travel and Tourism
* These figures represent all economic activity within the noted sectors (i.e., gaming, restaurant, retail, etc.). As such, some sectors include expenditures by non-visitors (e.g., restaurant spending by residents).
** All counties are located partially within Pinelands and results include businesses outside Pinelands.

Table 9:
1997 Travel and Tourism Impacts by County

	Jobs (Thousands)	Payroll ($ Millions)	State Taxes ($ Millions)	Local Taxes ($ Millions)
Pinelands Counties**				
Atlantic	124.1	3318.4	903.2	587.1
Burlington	20.9	423.5	106.1	36.5
Camden	25.9	443.9	100.3	39.5
Cape May	38.8	854	227	108
Cumberland	5.5	99.9	19.8	7.2
Gloucester	10.5	185.2	35.6	15.9
Ocean	53.2	753.6	228.5	92.3
Other NJ Counties				
Bergen	52.2	1133	231.3	89.9
Essex	42.3	889.6	187.6	70.6
Hudson	26.2	537.4	113.7	41.4
Hunterdon	4.9	98.7	21.2	8.8
Mercer	24	419.3	106.3	34.5
Middlesex	42.6	846.7	185.3	64.1
Monmouth	45.2	781	224.5	82
Morris	32.2	657.6	156.4	52.4
Passaic	16.1	341.1	60.9	25.6
Salem	3.4	61.8	13.2	5.3
Somerset	17.8	366.6	82.7	28.5
Sussex	7.7	135.1	37.4	16.3
Union	24.8	499.6	122.4	38.7
Warren	4.6	76.5	18.7	7.5
State Totals	622.9	12,922.5	13,545.4	1,452.1

Source: Center for Survey and Marketing Research, from the New Jersey Office of Travel and Tourism

* These figures represent all economic activity within the noted sectors (i.e., gaming, restaurant, retail, etc.). As such, some sectors include expenditures by non-visitors (e.g., restaurant spending by residents).

** All counties are located partially within Pinelands and results include businesses outside Pinelands.

IV. MARKET ASSESSMENT

Given the tourism resources available in the study area and the types of impacts desired by the communities, who might be the travelers who would visit the target area? This section provides an analysis of the tourism market accessible to the study area. The discussion presents information on current visitor profiles to the State of New Jersey, the major destinations of Atlantic City and Cape May County, and data on the general travel and activity preferences of the key nearby geographic markets around the Pinelands.

THE CURRENT MARKET OF TRAVELERS

Overview of State Visitors

During 1997, New Jersey drew over 75 million overnight trips and over 227 million day trips. As shown in Table 10, pleasure trips far outweighed business travel for both overnight and day trips. Given that the majority of beach and casino trips occur within the general region of the Pinelands, these figures alone provide a sense of the immediate travel market: 9.3 million overnight casino travelers and 4 million overnight beach travelers. Day trippers totaled 25 million for casino gambling and 14 million for the beach.

Table 10:
Reasons for Taking a Trip to New Jersey, 1997

	Overnight		Day Trip	
	(Millions)	(%)	(Millions)	(%)
PLEASURE TRIPS	34.6	46%	107.5	47%
Visit Friends/Relatives	15.3	20%	35.8	16%
Casino	9.3	12%	25.3	11%
Beach	4	5%	14.4	6%
Special Events	1.7	2%	6.6	3%
Touring	1.4	2%	7.8	3%
Business/Pleasure	1	1%	N/A	N/A
Outdoor	0.8	1%	6.4	3%
City	0.5	1%	5.5	2%
Theme Park	0.3	0%	3.8	2%
Country	0.1	0%	0.5	0%
Ski	<0.1	0%	1.2	1%
Cruise	0.1	0%	0.1	0%
BUSINESS TRIPS	6.2	8%	12.6	6%
TOTAL	75.3		227.5	

Source: Longwoods International, from the New Jersey Office of Travel and Tourism

As shown in Table 11, 34% of the state's tourists were from the New York metro area. Fourteen million of these NY travelers were overnighters and 82 million were day trippers. Philadelphia was second with 18% of the total tourism tally (7 million overnight and 30 million day trips).

Table 11:
New Jersey's Sources of Tourism Business, 1997

Metropolitan Area	Sources of Overnight Trips		Sources of Day Trips	
	Estimated Trips (Millions)	Percent	Estimated Trips (Millions)	Percent
New York	13.7	34	81.6	68
Philadelphia	7.3	18	29.8	25
Washington, DC	2.2	5	1.6	1
Boston	1.4	3	1.1	1
Baltimore	0.9	2	1.1	1

Note: The metropolitan areas of New York and Philadelphia each include part of the state of New Jersey.
Source: Longwoods International, from the New Jersey Office of Travel and Tourism

Table 12 provides a sense of the distribution of travelers to sites in the general Pinelands region. The largest segment travels to Atlantic City—39% of all state trips or almost 16 million trips. Cape May is second with 8% of all trips statewide and 3 million trips. Wildwood and Ocean City together captured 11% of the market or 4.3 million trips. These figures are drawn from visitor surveys and not the actual visitation counts from the destinations. However, it is informative to observe that most of the attractions in the general Pinelands area lying outside of the immediate Atlantic City vicinity capture between 100,000 and 400,000 visitors a year per destination. This provides a rough idea of the number of people who are traveling across and around the Pinelands each year in search of tourism experiences and is a figure that can be roughly used as the market potential for well promoted Pinelands destinations.

Table 12:
Places Seen, Visited or Experienced—Overnight Trips

	(%)	Millions of Trips (Estimated)
Atlantic City	39	15.8
Cape May	8	3.1
The Wildwoods	7	2.7
Ocean City	4	1.6
Six Flags Great Adventure	3	1.3
Sea Isle City	2	0.7
East Point Lighthouse	2	0.6
Lucy the Elephant/Margate	1	0.5
Barnegat Baymen's & Decoy Museum	1	0.4
Renault Winery	1	0.3
Wheaton Village	1	0.3
Antiquing	1	0.2
Pine Barrens	**1**	**0.2**
New Jersey State Aquarium/Camden	1	0.2
Mullica Hill	<1	0.2
Wetland Institute	<1	0.1
Cape May Victorian Week	<1	0.1
Fortescue	<1	0.1
Marine Mammal Stranding Center/Brigantine	<1	0.1
Thompsons Beach	<1	<0.1
Delaware Bay Schooner	<1	<0.1

* From the office of the NJ Travel and Tourism, May 1998

Current South Jersey Visitors

Philadelphia and its surrounding suburban area have historically been a primary origin of travelers to the Southern New Jersey tourist attractions. Cape May and Atlantic City began to vie for this market over one hundred years ago. Then, fire destroyed parts of Cape May, first in 1869, and again in 1878. Between those years, Cape May began to lose ground to Atlantic City as the summer hot spot. After the second fire, Cape May residents chose not to compete head to head with their northern neighbors, instead rebuilding a more understated town with pristine Victorian homes that, a century later, has stood the test of time and resulted in two very different tourist destinations in South Jersey.

Atlantic City Visitor Profile

As New Jersey's number one tourist destination, Atlantic City draws millions to Southern New Jersey every year. The existence of this large, established market may offer an opportunity for the Mullica River Corridor as this area tries to develop its tourism industry. It is important to consider the profile of Atlantic City visitors and their travel habits.

The Atlantic City Research Program's July 1994 Report profiles visitors to the area for 1993. This study reveals that Atlantic City draws a "somewhat upscale" visitor, one that holds a managerial or professional position with a college degree. Tourists staying overnight have lower incomes ($25K–$49.9K) than do those visiting for the day ($50K–$74.9K). Both groups tend not to bring children.

New York State and New York City dominate among states and cities of origin for overnight trips, representing 29% and 34% of their respective totals. Pennsylvania ranks second out of states of origin with 15%, followed by New Jersey (11%) and Ohio (8%). For cities, Philadelphia and Pittsburgh follow New York City, both contributing 7% of all overnight visitors. Most personal overnight trips are by car and commercial trips by bus.

- Day-trippers accounted for 30 million of the 37 million tourists in 1993.
- New York City supplied 48% of day visitors, followed by 40% from Philadelphia.
- Tourism to Atlantic City is somewhat seasonal. 39% of overnight trips occur between June and August, 25% from September to November, 15% from December to February and 21% from March through May. Day trips follow a similar pattern.
- Atlantic City's draw is gaming. Two-thirds of overnight trips are made to game, and 90% of all visitors gamble during their stay.
- Other popular activities include the beach, boardwalk, shows, and shopping. Nature activities, sports, history and other alternatives are infrequent. Again, day trips are very similar.

A more recent profile prepared for the Convention and Visitors Authority in 1998 found that the typical Atlantic City visitor is 55 years old, stays only a few hours, plays the slots, and spends little on anything but gambling. Most visitors travel to the resort by car and bus and return an average of eight times per year. Nearly 80 percent are from New Jersey, New York, or Pennsylvania. Visitors spent an average of $400 per trip including gambling, with day-trippers spending $258 and overnight visitors spending $294. People attending public shows (such as antique shows) spent $447 per trip. Visitors spent an average of 4.5 hours gambling. Day-trippers spent $60 on non-gambling expenses, while those attending public shows spent $373 on non-gambling expenses.

The strengths of Atlantic City's image are its excitement, popularity, proximity, affordability, facilities, and beach access. Its image is weak in the areas of sightseeing, hospitality and appropriateness for families, cultural offerings, and sports. Based on the dominance of gaming during visits and the weak image in other areas, a critical consideration is whether or not visitors would expand their travel experiences in the area if they were more aware of alternatives, or if such different vacation goals are incompatible.

For the purposes of this tourism strategy, it will be assumed that there is a small portion of this Atlantic City market that might be drawn out for day trips. Specifically, this strategy will target the approximately 7 million visitors that are families with children. This one group might have an interest in one-half day to one-day trips out to nearby areas, but the experiences must be carefully targeted to the interests of children and parents seeking a non-Atlantic City experience for their children.

Cape May County Visitor Profile

The New Jersey Division of Travel and Tourism surveys Cape May County visitors yearly.[3] While the 1998 data does not identify cities and states of origin for visitors, it is safe to assume that, like Atlantic City, New York City and Philadelphia are dominant sources of travelers to this area as well.

The survey highlights the seasonality of Cape May tourism, with 34% of visits in August and close to 90% between June and September. Stays are typically three or four days. Most visitors are aware of Cape May County and have visited before. Groups tend to be comprised of couples or families with one or two children. The adult respondents from the sample group were most likely to be 36-45 years old and have incomes of \$50K–\$59K.

In response to a question that asked why they visited the area, visitors cited beaches most often. "Close to Home," "Relaxation," "Family oriented," and "History" followed in that order. Notably, birding and natural beauty were low priorities.

Most respondents were quite satisfied with their Cape May visit, with fully 98.8% saying they would return. And although nature and history were not reasons people made the trip, they ranked high in terms of enjoyable activities, following closely after the beach and boardwalk.

Finally, visitors were asked what would make them stay longer and what attractions or services could be provided to improve future visits. Lower prices, cleaner beaches, more parking, less traffic and a quieter, more family-oriented atmosphere are some examples of comments made.

Overall, it appears that Cape May County—including all the various other shore communities—is a very popular beach resort with many secondary offerings. While it has numerous wildlife attractions, Cape May County is not necessarily a nature lover's destination. In fact, the summer crowds and cost may be a deterrent for this tourist segment. For the same reasons, a more down to earth alternative might be well received by families.

This information on Cape May County suggests some strategic considerations. First, Philadelphia is a dominant market for Cape May County and therefore many tourists are traveling right through the Pinelands region. Second, it is clear from this data that people are seeking *relaxation* from their trip to Cape May, not necessarily exploration. The high number of repeat visitors suggests that there is a certain ritual involved in going to Cape May County, whether it be for the two person weekend getaway in the town of Cape May or for the annual summer vacation in one of the shore communities such as Avalon, Stone Harbor, Ocean City or Wildwoods. Broadening these visitors' experiences with a trip to the Pinelands region will be difficult for those content with Cape May County's familiarity, but may be possible for those with a nature orientation and who are looking for a change of pace.

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[3] Please note: The survey covers all of Cape May County.

Summary of Major Surrounding Marketing Areas

The Philadelphia and New York City Markets: Profiles of Their Populations

Its population and proximity make Philadelphia a natural tourist market for the Mullica River Corridor as it has been for Cape May and Atlantic City for over a century. Key transportation corridors link the City of Philadelphia to these areas: the Atlantic City Expressway, Route 30 and Route 322 pass the Mullica River Corridor on its south side.

New York City is a prospective market for Pinelands tourism based both on its large contribution to the existing tourist base and because the population alone can potentially support a wide variety and number of attractions. In fact, the complaints of crowding, priciness and inhospitability to families in New Jersey's Cape May County tourism survey, along with Atlantic City's weak image in many areas, may indicate that there is ample room in the South Jersey area for alternatives.

The following information offers profiles of the lifestyle preferences of the residents of the noted geographic areas. The analysis uses data from Standard Rate and Data Services Lifestyle Market Analyst report. This survey-based tool identifies the typical interests of the persons living in geographic areas ranging in size from counties to metropolitan media markets. The various lifestyle interests (e.g., wines, hunting, our nation's heritage, etc.) are indexed against an average for the nation. If a place's index score is greater than 100, the residents of the place have a greater than average interest in the activity. The number of households with an interest in each lifestyle activity is also estimated.

As shown in Table 13, the large populations of both the Philadelphia and New York City areas offer a significant number of households who participate in outdoor recreational activities, even though some of these categories represent somewhat weaker preferences relative to the general U.S. population. The Philadelphia Designated Market Area (DMA) includes 17 counties in all, encompassing parts of southern New Jersey, New Castle County, Delaware, and 8 Pennsylvania counties. The New York City DMA includes 26 New York, New Jersey and Connecticut (Fairfield) counties.

Table 13:
Profile of Philadelphia & New York City Designated Market Areas

	Philadelphia		New York City	
Total Population	5,482,105		14,579,057	
# of Households	2,650,392		6,911,632	
Median Age	48		48	
Median Income	43,677		46,158	
% Married	53		51	
% With Children at Home	34		32	
Top Lifestyles	Households	Index	Households	Index
Wines	461,168	123	1,306,298	134
Casino Gambling	471,770	119	1,188,801	115
Gourmet Cooking/Fine Foods	569,834	117	1,679,527	132
Attend Cultural/Arts Events	466,469	108	1,444,531	128
Our Nation's Heritage	143,121	104	345,582	96
Wildlife/Entertainment	437,315	101	1,078,215	95
Boating/Sailing	265,039	92	670,428	89
Fishing Frequently	535,379	74	1,140,419	60
RV	180,227	72	380,140	59
Camping/Hiking	461,168	68	974,540	55
Hunting/Shooting	283,592	40	469,991	42

(Source: 1997 SRDS Lifestyle Analyst)

Of the activities found in the Pinelands and surrounding region, SRDS Lifestyle Market Analyst rankings show strong preferences in the Wines, Casino Gambling, Cultural/Arts Events, and Gourmet Cooking and Fine Foods categories for both DMAs.

A review of DMA demographic data shown in Table 14 reveals two slightly different profiles for Philadelphia County, comprised primarily of the City of Philadelphia, and its county neighbors that are representative suburban markets for the Pinelands area. A larger single and childless population with lower incomes characterizes Philadelphia County compared with the surrounding suburbs. The outdoor recreation categories rank low in contrast to the U.S., and the greater Philadelphia region.

Table 14 also identifies demographic and lifestyle data for various counties with sizable populations that have easy access to the Mullica River Corridor.

The suburban counties show the same strong arts and cooking preferences as Philadelphia, but have higher indices for the Wines and Our Nation's Heritage categories. Outdoor recreation is more popular in these suburban DMAs, particularly for wildlife and boating activities.

Table 14:
Demographic and Lifestyle Data for Selected Counties in Pennsylvania, New Jersey and Delaware

	Philadelphia County Pennsylvania		Montgomery County New Jersey		Bucks County Pennsylvania		Union County New Jersey	
Total Population	1100808		546797		453073		387044	
# of Households	546083		269153		205445		178585	
Median Age	48		49		47		50	
Median Income	29443		54525		53899		49842	
% Married	52		58		61		54	
% With Children at Home	29		31		36		31	
Top Lifestyles	Households	Index	Households	Index	Households	Index	Households	Index
Attend Cultural/Arts Events	111401	125	54369	124	34309	102	35360	121
Gourmet Cooking/Fine Foods	123415	123	61367	124	45198	120	41432	126
Casino Gambling	120684	148	36067	90	31022	101	34110	128
Wines	86281	112	52216	136	38213	132	33753	134
Our Nation's Heritage	24028	85	15073	108	11916	112	8929	96
Wildlife/Environment	78636	88	44949	102	37186	110	25538	87
Boating/Sailing	36588	61	27184	93	23626	106	15894	82
Fishing Frequently	85735	57	44679	61	41705	74	27859	57
Camping/Hiking	67714	49	45218	66	37596	72	22323	49
RV	25666	50	15342	61	14997	78	8751	52
Hunting/Shooting	35495	40	26108	60	25475	77	10001	35

	Camden County New Jersey		New Castle County Delaware		Mercer County New Jersey	
Total Population	372266		358530		254743	
# of Households	177883		177960		117817	
Median Age	47		46		48	
Median Income	43515		47761		51615	
% Married	53		54		52	
% With Children at Home	35		32		30	
Top Lifestyles	Households	Index	Households	Index	Households	Index
Attend Cultural/Arts Events	28461	98	33101	114	24035	125
Gourmet Cooking/Fine Foods	37355	114	38083	116	29101	134
Casino Gambling	35221	133	25982	98	22267	127
Wines	29351	117	30965	123	22267	134
Our Nation's Heritage	8894	96	9076	98	6362	104
Wildlife/Environment	27572	95	29363	101	19322	100
Boating/Sailing	17144	94	21177	100	11075	86
Fishing Frequently	33264	68	34525	71	20265	63
Camping/Hiking	27394	60	30609	67	17790	59
RV	12274	73	11389	68	6480	59
Hunting/Shooting	12630	44	30609	56	8129	43

The U.S. Market: Potential for the Pinelands to Attract National Travelers

Southern New Jersey's varied and unique wildlife attractions could potentially draw tourists from a broad regional and national market. Various wildlife migrations occur through traditionally off-season months. The U.S. wildlife/environmental market presents some cross-marketing opportunities that compare favorably to those of gambling, supporting the possibility of capitalizing on Atlantic City's tourism. It should be emphasized, however, that Atlantic City visitor surveys demonstrate that most current gamblers are interested in only one thing—gambling. Nonetheless, some potential exists to attract the sizable number of families that go to Atlantic City each year.

The following table presents activities available in the Pinelands that are popular with both gambling and wildlife enthusiasts based on relatively high cross-marketing scores from the Lifestyle Analyst surveys:

Table 15:
Cross-Marketing: Gamblers and Wildlife Fans' Affinities for Pinelands Activities*

Pinelands Activities	Indices for Gamblers	Indices for Wildlife Fans
Attend Cultural/Art Events	147	184
Boating/Sailing	142	170
Collections/Collections	158	176
Fishing Frequently	138	160
Fine Art/Antiques	274	196
Golf	136	99
Gourmet Cooking/Fine Foods	136	164
Hunting/Shooting	123	180
Our Nation's Heritage	229	250
Recreational Vehicles	165	184
Wildlife/Environmental	123	
Wines	148	163

(Source: 1997 SRDS Lifestyle Analyst)
* The indices represent the degree to which a gambler or wildlife enthusiast is interested in the noted Pinelands activities.

Our Nation's Heritage represents the highest cross marketing index for both gambling and environmental markets. Batsto and other such destinations deserve marketing attention, and the Pinelands region may be well served by developing additional historical attractions and districts.

The interest in fine foods, wine and art are common to the two groups, which also parallels the Philadelphia market. Given the availability of desirable cultural, natural and historical attractions in Cape May, the proximity of the inland area to agriculture may provide an opportunity for its differentiation.

Based on these data, communities might also consider exploring is there is unmet need for RV facilities.

V. COMPETITIVE SET

The purpose of this section is to profile several tourism areas whose geography and similar resources make it likely that they would be competitive destinations for the visitors that might be targeted to come to the Pinelands. In identifying competitive tourism destinations, the following criteria were used:

- Proximity to Pinelands (i.e., the competitive area needed to be within the general weekend travel range for residents of the metro Philadelphia and New Jersey area)
- Presence of natural and outdoor recreational opportunities beyond a primary focus on a beach vacation
- Presence of historical or cultural tourism opportunities

Using these criteria, for example, both Atlantic City and the Jersey shore were eliminated as part of the competitive set as they met only the geographic criteria. It should be noted, however, that Atlantic City and the Shore are obviously competitors in a certain sense. That is, someone traveling to South Jersey will have many lodging and travel experiences from which to choose and if someone goes to another part of South Jersey rather than the study areas, then those other areas can be seen as competition. However, the dominant perspective taken in this analysis is that the inland Pinelands communities have more to gain by seeking ways to complement the experiences offered by the Shore and Atlantic City rather than seeking to compete head on. Given the overall lack of visitor services and facilities in the study area, there is little short term chance for these places to succeed by competing directly.

The areas profiled include:

- Cape May, New Jersey
- Bucks County, Pennsylvania
- The Poconos region, Pennsylvania
- Pennsylvania Dutch County
- Brandywine Valley, Delaware

For each region, details are provided on their positioning and image, major resources, and the area's competitive strengths and weaknesses vis-à-vis the Pinelands.

This review of the Pinelands' primary competitive set does not suggest that the Pinelands should mimic these areas or that these areas represent models for development of the region. Instead, these profiles provide a sense of the major alternative destinations that the Mid-Atlantic traveler will have before them. The Pinelands must consider how to place its tourism product before these consumers and how to create a distinctive image that can attract the types and numbers of visitors sought by Pinelands communities.

CAPE MAY, NEW JERSEY

Positioning and Resources

Cape May is perhaps the Pinelands' strongest direct competitor. It offers many of the same natural and ecotourism opportunities as the corridor.

Cape May bills itself as "queen" of seashore resorts. As the nation's oldest seashore resort, the area is known for its distinctive Victorian architecture, quaint inns, shopping, and fine dining. Cape May is the nation's only entire city designated as a National Historic Landmark and offers numerous walking tours, mansion tours, and special events which build on its rich stock of Victorian buildings and history including its whaling past and its role in the Civil War.

In addition to its beach-oriented activities, Cape May also has an abundance of well-developed ecotourism resources, and positions itself as "North America's premier birding location." Some of its major resources include:

- The Nature Center
- Cape May Bird Observatory / New Jersey Audubon Society
    - The Center for Research and Education
    - The Northwood Center
- Cape May Migratory Bird Refuge
- Cape May State Park
- Cape May Whale Watch & Research Center
- Cape May Hawk Watch
- Butterfly Watching

Average cost of lodging and dining in Cape May (cost per day for two people sharing a room):

Expensive	Moderate	Inexpensive
$310 to $470	$220 to $270	$120 to $190

Source: *The Discerning Traveler's Guide to the Middle Atlantic States*, St. Martin's Griffin, NY. 1997

Positioning Against Pinelands Destinations

Cape May has many strengths that make it a formidable competitor: extensive and well-developed natural resources, architecturally distinctive buildings and environment, and a strong supply of lodging, restaurants, and shopping.

The Pinelands will find it difficult to compete directly against Cape May if travelers are making their selection based on being able to combine a quaint get-away complete with beautiful accommodations and fine dining with an eco-tourism experience.

BUCKS COUNTY, PENNSYLVANIA

Positioning and Resources

Bucks County describes itself as "rich in history and tradition. Beautiful countryside with rolling hills and covered bridges."

It is located 26 miles northeast of Philadelphia and 95 miles from NYC, making it a popular weekend getaway for those metro areas. It encompasses several historic villages including Doylestown, New Hope, Washington's Crossing, Lumberville and Lahaska. The village of Lambertville opposite New Hope is well known for its Victorian architecture and its galleries and antique shops. While each village has its own individual character, Bucks County has a fairly unified image of a region with bucolic countryside plus a healthy splash of art, culture, and history. The New Jersey side of the Delaware River across from Bucks County is home to many similar villages and historic attractions beginning with Washington's Crossing State Park and continuing north through Stockton and Frenchtown.

Bucks County offers a variety of artistic and cultural opportunities including several notable museums, and theater companies.

Bucks County has an abundance of unique lodging options including inns and bed and breakfasts, as well as numerous dining and shopping opportunities. The region is especially well known for its antique stores and flea markets. It also boasts several vineyards which are popular tourist destinations.

Bucks County's location adjacent to the Delaware River provides the opportunity for tubing and mule barge rides on the canal. Other natural resources and outdoor opportunities include biking and hiking in the region's extensive state park system, rock climbing, and spelunking in the numerous area caves. The County is also well-situated for excursions along the New Jersey side of the river.

Average cost of lodging and dining in Bucks County (cost per day for two people sharing a room):

Expensive	Moderate	Inexpensive
\$340 to \$500	\$250 to \$300	\$150 to \$220

Source: *The Discerning Traveler's Guide to the Middle Atlantic States,* St. Martin's Griffin, NY. 1997

Positioning Against Pinelands Destinations

Like Cape May, Bucks County is a far more developed tourism resource than the Pinelands tourism areas. And, like Cape May, Bucks County is a much more desirable destination for visitors looking for a getaway that combines upscale pampering with a smattering of natural experiences. Both the similarities and differences of the two areas, however, provide some potentially interesting positions for the Pinelands.

The Bucks County tourism experience is similar to the Mullica River area in that it has historic villages and attractions, antique shops, and a scenic river location. Bucks County, though, has the advantage of being able to offer visitors many fine lodging and dining options and other tourism-related amenities. However, the expense of a Bucks County weekend getaway, which can easily cost a couple $500 to $700, creates an opening for the Pinelands to position itself as a lower cost and less commercial alternative to Bucks County while offering many of the same types of tourism experiences. For visitors currently traveling to Bucks County (or wanting to travel to Bucks County but being priced out of the experience), the river corridors of the Pinelands might be a viable option.

Although it offers many outdoor recreational options in a very scenic area, Bucks County does not offer the same types of ecotourism the Pinelands offers. Additionally, many parts of Bucks County would not be considered as pristine. Therefore, the Pinelands can carve out a position of a true ecotourism destination that has not become a full-fledged tourist area. It would be desirable if lodging could reflect this uncommercial approach.

BRANDYWINE RIVER VALLEY, DELAWARE

Positioning and Resources

Delaware's Brandywine River Valley is also a lovely scenic region with charming towns and lush landscapes. Despite its beauty, however, the Brandywine's primary claim to fame is the area's extensive world-class museums, antiquing, and other cultural attractions. Home to Longwood Gardens, the Brandywine Museum featuring an extensive collection of Wyeth paintings, Winterthur Estate, and numerous other cultural facilities, the Brandywine River Valley attracts visitors who want a getaway with ample opportunity to explore the historical and cultural resources of the area in a beautiful setting with many fine lodging and dining alternatives. The area is also rich in colonial history and offers many heritage tourism attractions including well-preserved buildings from the 18th and 19th centuries.

The natural landscape is beautiful for walking and hiking, and the Brandywine River offers many recreational opportunities including canoeing and tubing. While natural resource experiences are available in the area, they are clearly secondary in importance to the cultural opportunities in terms of attracting visitors, and most tourism materials do not extensively play up these recreational options.

Average cost of lodging and dining in Brandywine River Valley (cost per day for two people sharing a room):

Expensive	Moderate	Inexpensive
$330 to $580	$220 to $290	$160 to $190

Source: *The Discerning Traveler's Guide to the Middle Atlantic States*, St. Martin's Griffin, NY. 1997

Positioning Against Pinelands Destinations

The cultural resources of the Brandywine River Valley provide a strong point of differentiation for this area in relation to the Pinelands and other potentially competitive destinations. While the Brandywine's unique cultural resources cannot be replicated in the Pinelands, the idea of combining art, culture and a leisurely travel experience is one that the Pinelands should consider. Thought should be given to what cultural resources currently exist in the region and what resources could be developed. An objective might be to express the larger environmental theme through various artistic media.

THE POCONOS, PENNSYLVANIA

Positioning and Resources

Perhaps the predominant image of the Poconos is that of a densely developed tourist area that bills itself as a "honeymoon capital" replete with motels featuring heart-shaped beds and mirrors on the ceiling. Yet beyond the commercialized image of the Poconos, this is a region with abundant natural resources and many historic villages and attractions.

The Poconos offers a full range of outdoor, four-season recreation activities including skiing, golf, canoeing, water sports, fishing, and rafting, hiking, and mountain biking. There are also many historical and cultural attractions and shopping opportunities including antiques and collectibles. Local museums offer a glimpse of the area's mining and Victorian heritage. Major ecotourism attractions include several state parks and forests, the Delaware Water Gap National Recreation Area (spanning both Pennsylvania and New Jersey), and the 600 acre Dorflinger-Suydam Wildlife Sanctuary. The sanctuary is relatively developed and features a glass museum and an amphitheater on the grounds.

Average cost of lodging and dining in the Poconos (cost per day for two people sharing a room):

Expensive	Moderate	Inexpensive
\$250 to \$520	\$190 to \$250	\$150 to \$190

Source: *The Discerning Traveler's Guide to the Middle Atlantic States*, St. Martin's Griffin, NY. 1997

Positioning Against Pinelands Destinations

For the average Philadelphia or New York metro area resident considering a vacation or getaway within the mid-Atlantic region, the choice of the Poconos over other areas might largely be driven by its mountain landscape and climate. Other factors include familiarity, or preference for certain types of lodging, amenities or activities (e.g. skiing). For those travelers open to comparing the Pinelands with the Poconos, differentiation can easily be achieved through the concept of being an undeveloped or less developed destination. The Pinelands should take advantage of its large tracts of open space and its environmental protection ethos to attract travelers seeking a more rustic experience. Aside from these factors, the proximity of the shore can also be a drawing point for the Pinelands.

Pennsylvania Dutch Country/Lancaster County

Positioning and Resources

Lancaster County is most strongly associated with the *Plain People*—the Amish, Brethren, and Mennonite groups who reject many of the trappings of modern day *progress* and voluntarily live a simple, low technology traditional life focused around church and family. The predominant visual image of this beautiful rural area is that of a traditional horse and buggy on green rolling hills. Over five million visitors come to Lancaster County annually to get a feel for these people who live very much like rural people of the 19th century. Many of the major "attractions" of the area are tied to the spirit of the Plain People including historical sites, museums, farmers markets, meeting houses, and down-home cooking. Visitors can also dine with local families and visit working farms.

Yet, despite the simplicity of the Plain People, the area is also full of many more typical manifestations of a modern tourist area including miniature golf, water slides, amusement parks, tourist shops, wineries and breweries. So, while the peaceful atmosphere, beautiful scenery and traditional lifestyles of the Plain People may be the initial draw, area businesses have contributed plenty of other attractions to retain the modern day visitor.

While there are many opportunities for hiking and other outdoor activities, the area is generally not considered pristine and tends to downplay non-agricultural natural resources in favor of the resources mentioned above. It is not a destination that heavily promotes any ecotourism resources.

Average cost of lodging and dining in Lancaster County (cost per day for two people sharing a room):

Expensive	Moderate	Inexpensive
$290 to $340	$160 to $260	$70 to $150

Source: *The Discerning Traveler's Guide to the Middle Atlantic States*, St. Martin's Griffin, NY. 1997

Positioning Against Pinelands Destinations

Positioning against Lancaster County suggests taking advantage of the maritime theme that runs along the Jersey shore. Maritime history is one of the strong themes emphasized by the New Jersey Coastal Heritage Trail. The Mullica River offers the opportunity to interpret maritime and colonial history—especially as it relates to the Revolutionary War. While the Pinelands does not offer examples of people living 19th century lives, it does offer the opportunity for people to learn about agriculture, maritime industries and glass making—all of which are natural resource-based endeavors. In addition, the Pinelands' history of being a place that people went to in order to escape aspects of conventional society does offer an interesting interpretive story. What is needed is a forum for telling that story.

VI. STRATEGIC CHALLENGES, OPPORTUNITIES AND DIRECTIONS

KEY FINDINGS

Based on the material and ideas from this report, several findings and conclusions should shape this tourism strategy.

1. **Tourism Potential:** The Mullica River Corridor has tourism development potential and is seeking tourism development that will provide property tax revenues and strengthen the local business base while protecting local character. The communities within this corridor have natural resources that will be of interest to tourists. The challenge is to package the existing experiences and to build the base of facilities and services that can help people access what each area offers. What is needed is a tourism framework that offers these resources to visitors and helps the visitor enjoy their stay.

2. **Tourism Market Potential:** Given the millions of people that already travel to Atlantic City, the Jersey Shore and Cape May County, coupled with the demonstrated visitation figures in the hundreds of thousands to existing tourism attractions in South Jersey, there is clearly an adequate base of tourists from which to build local economic activity. The current visitor profile does not closely align, however, with the experiences that the study area offers. Gaming and beach-side experiences dominate the minds of most current visitors. Visitors see Cape May as an upscale getaway; they do not see the region as a *back to nature* getaway spot. The success of the birding market in Cape May County, however, demonstrates that thousands of people are interested in the natural features of South Jersey and that this base provides a foundation from which to grow.

3. **Barriers to Consumer Acceptance:** The study communities face challenges in consumer awareness, product development, and visitor services. Most general travelers are not aware of the Pinelands; even fewer are aware of the study area as it has not been promoted. Mostly campers using area campgrounds know of these places. The product in each area is undeveloped and unpackaged. One particular concern is the trend for the state parks to be reducing rather than increasing investment in their facilities. Also, there are few services for visitors in each area—lodging in particular is lacking as indicated by absence of facilities other than campgrounds and the low lodging expenditure figures.

4. **Target Visitation Levels:** For the Mullica River Corridor, the annual target visitation figure is 48,000 additional tourists. This equates to 8,400 persons or 2,400 cars per peak month and 3,600 persons or 1,029 cars per shoulder season month. These figures equal per weekend day traffic of 200 cars in the peak season and 86 cars in the shoulder season. Average daily weekday traffic on Route 9 through New Gretna is between 8,000 and 10,000 cars. Traffic on Route 542 averages 5,000 cars per day. These target figures are well within existing traffic levels and road capacities.

5. **Visitation Economic Impacts:** Based on the above analysis, these levels of visitation will increase local tourism spending by a minimum of 20% over current levels. If 50% of these groups can be converted to overnight stays, then the Mullica River Corridor communities can create 1715 room nights. State expenditure averages are $113 per person per day per overnight trip. Using a conservative figure of $200 per day per party per overnight trip translates into $343,000 in local spending for the Mullica River Corridor communities from additional overnight visitors. Assuming that all other visitors are day trippers and spend on average $25 per person while in the area, then additional spending could equal $600,000 for the Mullica River Corridor. Using these assumptions, total impacts would be $943,000 for the Mullica River Corridor. If stays are lengthened and more experiences are offered to the consumer, spending impacts will rise.

   Note that the above figures estimate direct impacts only: indirect or multiplier impacts are not included but will enlarge the overall economic impact of tourism spending in the study areas. Multiplier impacts are the additional economic impacts that arise as spending circulates through a local economy. For example, some money spent in a store by a tourist is then spent again locally by store employees through their paychecks. Multipliers vary by region and community, but often range from 1.5 to 2.5 of initial direct expenditures.

6. **Tax Revenue Impacts:** Despite the value of these numbers, they may still be insufficient to result in substantial real estate investment, at least in the short term. For example, the typical chain motel requires a minimum 55% to 65% occupancy rate to make investment feasible. As shown in Table 16, average occupancy rates across the state ranged from 55% to 88% during 1997. Campground occupancies ranged from 25% to 45%. Assuming a 40-room motel requires 9,490 room bookings to meet the 65% threshold, then the area would not draw a chain motel under these assumptions. Bed and breakfasts and other smaller operations would be able to operate under these market conditions however. A typical B&B of six rooms would need 1,423 stays to reach a 65% occupancy rate.

Table 16
1997 Accomodations Inventory Occupancy -- By County

	Hotels/Motels/Resorts		Campgrounds	
	# of Rooms	Occupancy*	# of Sites**	Occupancy
Atlantic	19,883	88.6	1,679	36.3****
Bergen	6,734	77.3	-	-
Burlington	3,796	62.1	920	24.6
Camden	2,312	58.4***	-	-
Cape May	18,966	52.9	4,808	35.8
Cumberland	554	57.8***	17	35.8***
Essex	4,124	74.9***	-	-
Gloucester	662	58.4***	453	24.9***
Hudson	2,336	74.9***	330	36.3***
Hunterdon	535	46	454	45.8
Mercer	2,270	58.4***	20	24.9***
Middlesex	6,014	69.8	53	36.3****
Monmouth	4,429	53.2	184	44.1***
Morris	4,561	67.7	230	35.4***
Ocean	4,097	54	1,166	47.5
Passaic	862	74.9	50	36.3****
Salem	324	58.4	358	24.9***
Somerset	2,564	74	-	-
Sussex	929	74	978	39.1
Union	3,519	74.9	-	-
Warren	418	74	377	30.8
STATE	89,889	78.3	12,077	36.3

* Average weighted by rooms and months open
** Includes private and public transient campsites
*** Region average
**** State average
Source: Center for Survey and Marketing Research from the office of NY Travel and Tourism

The challenge facing these areas is that investment upgrades such as B&B's will not create significant amounts of value. While a new motel might create up to $2 million in new value, a B&B is more likely to be assessed at approximately $500,000, which may be just $100,000 or $200,000 more than the current assessed valuation of the residential property from which the B&B is developed. This suggests that the area's tourism strategy must identify a few limited, high value real estate projects—or many smaller projects with a high cumulative impact—that fit within the community's overall comfort zone for new development. Or, it may be that either visitation target levels must be increased or expectations of impacts must be lowered.

7. **Market Differentiation:** The key points upon which the study area should differentiate itself are the following:

   - **Greater Pinelands Region:** An important synergy should be established between the Pilot Program and the Pinelands Interpretive Project. The Interpretive Program's guiding principles clearly identify *visitors* to the Pinelands as being of equal importance to Pinelands residents and residents of the surrounding region.

It is recommended that the concepts presented in this Pilot Program Rural Economic Development Strategy be seen as a subset of the broader Interpretive Plan's strategies to heighten awareness of the Pinelands. The Pilot Program's mission is to heighten awareness and continue the protective mission of the Pinelands Act, but to also encourage appropriate economic development as an outcome of the promotion and awareness efforts.

The Pinelands needs to set itself apart from the competition and create a distinct image for travelers. The region, as a whole, lacks a distinctive enough landscape or architectural style to create this image on its own. Instead, the region's image must be shaped through interpretation, signage, marketing and facility development. For example, the Pinelands Commission and regional tourism organizations might seek to define a limited number of *Pinelands Recreation Areas, Rustic Areas, Wild Areas* or *Nature Exploration Zones.* These areas would aggregate the existing wildlife management areas, conservation areas, state parks and other public lands into coherent products or destinations for the traveler. Just as the National Park Service's Heritage Corridor program unites areas that are not under the ownership of the Park Service, this effort could unite areas under various ownerships into a more clearly defined *place* for the traveler. In each case, when travelers entered one of these areas, they would see and feel that they were in a special place.

Each of these study areas should be such a special place. The title *Mullica River Heritage Corridor* is suggested for this area and should be delineated on a map.

An important concept associated with this idea of defining specific destinations within the Pinelands is that less emphasis should be placed on already developed areas within the Pinelands. That is, only communities offering a specific image or experience enhanced by affiliation with the Pinelands should be signed as Pinelands communities. Random signs at all border points of the Pinelands should be avoided. Visitors need to see a consistency between the designation given a place and the landscape they see before them. If the Pinelands image stands for environmental protection and sustainable development, then visitors' experience in the areas they associate with the Pinelands should be consistent with that image.

The experience offered by a visit to the Pinelands should be *uncommercialized, untouristy, undeveloped, and uncrowded.* The key quality offered by parts of the Pinelands and inherent in the overall mission of the region is open space. The Pinelands should be seen as one of the havens or protectorates of open space within the East Coast megalopolis. When East Coast residents think of major protected open spaces, they should think of the Pinelands in addition to the National Forests of West Virginia, the Cape Cod National Seashore and Maine's Acadia National Park. This is not to say that all of the Pinelands offers this level of open space, but only those designated *rustic or wild* areas.

- **Mullica River Heritage Corridor:** The Mullica River Corridor offers a mixture of natural beauty, maritime history, colonial history, small villages and recreation. The Mullica River needs to project an image as a place that offers a cross-section of experiences ranging from seacoast history and environmental interpretation to the role of the river in the European settlement of the nation, the Revolutionary War and the subsequent history of the Pinelands. Ideally, this Corridor should stretch from Tuckerton Seaport to Batsto; these attractions should be the anchors for the corridor. (Note that there are resources near each of these anchors—blueberry farms near Batsto, for example—that might merit extending the corridor's geography.)

The Mullica River Corridor should again be a place that is *untouched* by the development that has crowded the Shore and many communities in New Jersey. The act of moving westward along the Mullica River should be an experience of moving back in time until reaching Batsto. Batsto Village will be a critical component of this corridor, and it must be returned to a more active place for visitors. Visitors need access to the river. Riverboat rides, motorboat rides, sailboat rides, kayaking and other ways to get on the river must become available though their character should be consistent with the rustic character of the corridor. Trails through the marshes should be considered. Restaurants overlooking the water should be encouraged at appropriate sites. Each point of access to the river should be enhanced by interpretation that coveys the story of the river and the relationship between the river and the history of the East Coast.

Opportunities and Challenges

Opportunities are the site-specific possibilities or the broader positive trends that might be used to help build a place's tourism economy. *Challenges* are the constraints or problems that must be addressed before an area can reach its tourism objectives. The opportunity and challenges for each study area are divided between short-term (1-5 years) and long-term (6-10 years) time horizons.

The major challenge facing the Mullica River Corridor is to define a corridor-long marketing strategy and build a coalition of public land managers and private businesses who will promote the concept. A major opportunity is to gain spin-off impacts from the Tuckerton Seaport project in Tuckerton.

Table 17:
Mullica River Corridor Opportunities and Challenges

Short-Term Opportunities	Long-Term Opportunities
• Promote the river corridor as a whole from Tuckerton to New Gretna to Batsto • Associate the Corridor with the Tuckerton Seaport Project • Encourage more Shore visitors to venture inland	• Make the Mullica River Corridor an established nature and heritage tourism destination • Create attractions along the Corridor interpreting Colonial shipping history • Work with State Forest to improve facilities • Reinvigorate the Batsto facility with more staff and more programs.
Short-Term Challenges	**Long-Term Challenges**
• Create a coalition of interested parties along the Corridor • Find funding for wastewater and streetscape work in New Gretna • Involve public resource managers along Corridor in tourism effort	• Solve funding problems in State Forest and Batsto • Create a larger range of lodging options along the Corridor • Solve wastewater problems for small businesses

STRATEGIC DIRECTIONS

Based on the above analysis, there are several potential strategic directions that the study area might pursue.

The Pinelands Region

High Potential Markets: The primary markets for Pinelands visitors will be the Philadelphia, Central New Jersey and metro New York markets. However, given the unusual environmental nature of the Pinelands, marketing efforts should make the national and international traveling public aware of the region as well.

Marketing Approaches

1. As noted by the Pinelands Interpretive Project, the Pinelands needs better definition of its geographic boundaries; this translates into a comprehensive signage program. Travelers should know when they enter or leave the region. From there, public awareness efforts can increase traveler understanding of what the Pinelands is and what makes it special. As discussed above, however, this signage and interpretive program should focus on the parts of the Pinelands that have landscape that expresses the broader image of the Pinelands. The stories to be told about the existence of the Pinelands must be clarified, and signage that announces a Pinelands border should be placed in areas where the natural or human built landscape expresses a Pinelands story.

2. Building from the above point, the Pinelands is a multi-faceted area and its tourism marketing effort should acknowledge that variety. Specific *visitor pathways* or *byways* should be defined and should guide visitors along the most scenic roads to the most interesting attractions and resources.

3. An image must be developed that addresses the issue of being a place to go to, not just a place to pass through on the way the Shore.

4. The *specialness* of the Pinelands should be conveyed to travelers. While the region is not a national park, in some respects the mission of the Pinelands Commission is similar in terms of placing a very high priority on the Region's natural resources. The region is noteworthy in that it offers a very different model from the rest of the U.S. on how an area can be managed as a working preserve. The compatible existence of Pinelands human communities with Pinelands non-human communities (i.e., wildlife and plant species) should be interpreted for the visitor. The idea that this is a special place will naturally flow from this type of interpretation.

5. Visitor management must be a prime objective for Pinelands tourism efforts and this should be translated into the marketing effort. For example, sensitive environmental areas should not be promoted, and carrying capacities of natural and historic resources should be defined. This type of environmentally sensitive management should be communicated to the traveler. It must also be acknowledged that some areas of the Pinelands are not scenic, not particularly interesting for the visitor and

not particularly oriented toward providing good visitor services. These areas do not need to be incorporated into the tourism program.

6. A representative marketing organization should be developed. This need not require the creation of a new group, but can bring together existing organizations and businesses with the objective of focusing on how to partner and how to bring the Pinelands before the traveling public. The primary objective here is the idea of gaining public and private sector acknowledgment that the Pinelands should be promoted for tourism, but in a sensitive, sustainable manner.

Critical Facility Development Objectives

1. At least one major interpretive center, along with information centers, will be needed to support the overall interpretive effort for the Pinelands. Given the broad geographic extent of the Pinelands and the variety of routes that visitors will take to access the region, consideration should be given to creating two interpretive centers, one near the eastern boundary (e.g., near the Garden State Parkway), and one at a southern or western gateway (e.g., at the Route 55 entry). The Pinelands Interpretation Plan calls for two information centers (located at the eastern and western borders) and one interpretive center. Other facilities may be developed in cooperation with other federal, state, and local organizations, or integrated with private sector ventures. Note that while this report recommends a interpretive center in New Gretna and an interpretive or information center near the end of Route 55 in Maurice River Township, the implementation of the overall Pinelands Interpretive Plan will require that the concepts presented in this strategy be balanced with the needs of the entire region.

2. Many smaller interpretive displays will be needed throughout the targeted Pinelands tourism corridors. This concept meshes closely with the recommendations of the Pinelands Interpretive Plan. One of the funding mechanisms discussed below is the designation of the targeted corridor areas as part of a National Scenic Byway affiliated with the New Jersey Coastal Heritage Trail. Funds are now available for interpretation and visitor facilities. The Park Service's involvement with the Heritage Trail only strengthens the ability of the corridor to create compelling interpretive exhibits.

3. While state park funding and investment are state level issues, they must be addressed in the strategies. The state parks are backbones to the open space systems in the Pinelands. Unless they are fiscally healthy and assertively offering programs to the public, they will be a limiting factor in the total tourism program.

Business Development

1. Small business development will be the key to gradual economic diversification toward tourism in the study areas. Consideration should be given to ways that regulatory processes can be streamlined for targeted tourism development sites.

2. Larger scale tourism business investments must be clearly defined and appropriate sites identified. Other tourism development objectives such as lodging, design standards and interpretation should all be integrated into larger scale private sector projects.

3. Public sector projects should consider the potential for integrating private sector ventures on the site. For example, if there is insufficient current market demand for another restaurant in an area, but a publicly subsidized private concessionaire could operate from a public facility, this can provide the *chicken-and-egg* stimulus to attract more visitors and then create a sufficient market for private sector success.

Mullica River Heritage Corridor

High Potential Markets: Geographic markets include Central New Jersey, the metro New York area (including Northern New Jersey) and Philadelphia. Demographic markets should run across the spectrum with a greater emphasis placed on travelers over 30 years of age. Lifestyle and interest markets should include nautical history, boats and boating, camping, American history, family education and the environment. The primary cross-marketing target is the Shore visitor and family. The key marketing links will be the Tuckerton Seaport with its projected 300,000+ visitors per year and the Batsto Village facility—which can hopefully be reinvigorated through more funding, staffing and programming.

Marketing Approaches

1. Place information in the New Jersey Division of Travel and Tourism materials.

2. Work with the New Jersey Coastal Heritage Trail to include materials and stories on the Mullica River Corridor in their interpretive centers in Matawan, Pennsville and at the Ocean View Service Area on the Parkway.

3. Obtain National Scenic Byway status for the New Jersey Coastal Heritage Trail in order to obtain marketing and funding benefits from that federal program and to assist with the development of a visitors center for the Heritage Trail/Byway near New Gretna.

4. Work with Tuckerton Seaport to develop a Corridor-long package of experiences and market the Corridor to Seaport visitors.

5. Work with the Atlantic City tourism office to develop day trip packages for Atlantic City visitors seeking a non-gaming experience. For example, package a trip to Tuckerton Seaport with a river trip to one of the Sweetwater riverside restaurants. This effort must be narrowly targeted toward families with children staying at resorts and in association with conferences.

6. Reinvigorate the Batsto Village marketing program to schools, group tours and the independent traveler.

Critical Facility Development Objectives

1. Seek funding to install a wastewater treatment system in the village of New Gretna.

2. Encourage the legislature to increase funding for Bass River State Forest, Wharton State Forest and Batsto Village.

TARGET MARKETS DEFINED

Based on the above analysis, the potential tourism target markets for the study area can now be more carefully defined. Each of the profiles presented below identifies likely travelers who could be drawn to the study areas. The characteristics of each group, size, and likely travel *hooks* or preferred experiences are reviewed.

Atlantic City Families

Note that this section describes Atlantic City *families*, rather than the typical Atlantic City visitor.

Visitor Description

- Mainstream visitors with children that stay one to two nights
- Gambling is not a serious past time

Number of Visitors

- 770,000 visitors based on the Longwood Study's 1993 tourism figures (7 million visitors stay overnight when visiting Atlantic City; 11% are families with children)
- Of the 770,000, 223,000 come from New York State, 115,500 from Pennsylvania, 84,700 from New Jersey and 61,600 from Ohio. The remainder came from other states.

Travel Route

- The Garden State Parkway from New York City and State
- The Atlantic City Expressway from Philadelphia and Pennsylvania

Length of Stay

- Day or half-day trips

Activity Preferences

- Maritime history and related activities
- Quiet activities in the Mullica River and Wharton State Forest areas, including hiking, boating and riverboat tours
- Educational experiences such as Batsto
- Tours of the Renault Winery

Competing Attractions

- Tuckerton Seaport
- Six Flags in Jackson and the Camden Aquarium
- Golf at various resorts
- The beach, boardwalk and numerous other Atlantic City area features
- The Edwin Forsyth Wildlife Reserve

Recommendations

- Publicize Mullica River area activities at resorts in Atlantic City that would tend to cater to families and at Six Flags and Tuckerton Seaport.
- Define a scenic drive and provide the associated signage along the Garden State Parkway and the Atlantic City Expressway directing motorists accordingly.
- Capitalize on traffic to surrounding attractions such as Six Flags, the aquarium and Tuckerton by offering amenities such as family oriented restaurants that highlight local foods and locate them in strategic stopping points to cater to this niche.

Cape May Visitors

Visitor Description

- Families with children taking beach vacations for up to a week
- Affluent empty nesters or newly marrieds lodging in Cape May Proper, typically for 3 to 4 nights
- Tend to visit small villages and towns and enjoy nature and history

Number of Visitors

- In 1997, 2.38 million stayed in shore rentals based on the 1998 Longwood's Study.
- 1.9 million stayed in hotels, motels or resorts.
- 60% were from out-of-state, with Philadelphia a dominant place of origin.
- Visits are highly seasonal.

Travel Route

- From Philadelphia, State Route 55 to State Route 47, Atlantic City Expressway, Routes 30 and 322, to Garden State Parkway

- From New York City, south via the Garden State Parkway

Length of Stay

- One-half to one full day

Activity Preferences

- National or State Park type attractions
- Calm, quiet alternatives to the more crowded shore scene, such as canoeing, nature viewing and museum visits
- Local dining and food restaurants and concessions, such as crab houses, u-pick farms and produce markets

Competing Attractions

- Cape May County Zoo
- Audubon facilities
- The beach and boardwalk

Recommendations

- Develop short hiking trails with interpretive signs highlighting wildlife and other natural features.
- Incorporate technology as a way to tour the area or as part of individual attractions.
- Promote the development of food facilities featuring local cuisine, initially in conjunction with the Park System, if necessary.

Heritage Trail Traveler

Visitor Description

- East Coast sightseers from the Mid-Atlantic region and beyond
- Interested in the Revolutionary War and maritime history
- First-time New Jersey visitors
- Seek to experience area highlights

- From New York City, south via the Garden State Parkway

Length of Stay

- One-half to one full day

Activity Preferences

- National or State Park type attractions
- Calm, quiet alternatives to the more crowded shore scene, such as canoeing, nature viewing and museum visits
- Local dining and food restaurants and concessions, such as crab houses, u-pick farms and produce markets

Competing Attractions

- Cape May County Zoo
- Audubon facilities
- The beach and boardwalk

Recommendations

- Develop short hiking trails with interpretive signs highlighting wildlife and other natural features.
- Incorporate technology as a way to tour the area or as part of individual attractions.
- Promote the development of food facilities featuring local cuisine, initially in conjunction with the Park System, if necessary.

Heritage Trail Traveler

Visitor Description

- East Coast sightseers from the Mid-Atlantic region and beyond
- Interested in the Revolutionary War and maritime history
- First-time New Jersey visitors
- Seek to experience area highlights

Number of Visitors

- 1.64 million visitors cited "touring" as their reason for being in New Jersey in 1997 (based on the 1998 Longwood's Study). This segment was drawn from a wide area and is expected to increase.
- 143,121 households from Philadelphia and 345,582 households from New York City represent potential visitors based on lifestyle preferences for "Our Nation's History."

Travel Route

- The North-South corridors for touring visitors
- The Garden State Parkway for New Yorkers
- The Heritage Trail from Philadelphia and points south

Length of Stay

- One to two nights or less, depending on the attraction

Activity Preferences in the Pinelands Area

- One to four hour experiences to allow for a day that includes several hours of driving
- Food experiences – especially seafood
- Maritime history and unique natural history
- Kids' programs, particularly educational in nature

Competing Attractions

- The Delaware side of the Delaware Bay
- The Chesapeake Bay area
- Historical sites along the North-South corridor that keep travelers from detouring through South New Jersey

Recommendations

- Publicize the Heritage Trail in key centers along the North-South corridor and at visitor centers at state entry points.
- Provide area activity information at visitor centers along the Heritage Trail.

The Outdoor Enthusiast

Visitor Description

- Campers
- Cape May traffic
- East Coast travelers with outdoor recreation preferences
- Naturalists, especially birders
- Regional visitors, particularly from Philadelphia

Number of Visitors

- Philadelphia's potential market size is 437,315 based on Wildlife/Environment lifestyle preferences
- Metropolitan New York City has over 1 million households that showed Wildlife/Environment lifestyle preferences

Travel Route

- Philadelphians travel to the Mullica River via the Atlantic City Expressway, and Routes 30 and 322.
- New Yorkers would likely be oriented to the Mullica River area, coming from the North on the Garden State Parkway.

Length of Stay

- Campers stay one or multiple nights
- Travelers to Cape May would tend to make half day stops
- Day visitors from Philadelphia may spend most of a day

Activity Preferences in the Pinelands Area

- Birding
- Natural history, including waterways and related Pinelands water facts
- Unique, local food experiences
- Beach combing and wildlife viewing (including horseshoe crabs and butterflies)

Competing Attractions

- Cape May's preserved waterway and beach area
- Chesapeake Bay

Recommendations

- Expand facilities for bicycle touring, designate an area for all terrain vehicles and develop informational hiking trails.
- Develop appropriate rustic style resort(s) and cabin facilities or yurts to allow alternatives to tent campers and to expand shoulder and winter season visitation.
- Provide local nature guides and area information at visitor centers.
- Upgrade existing boat launch parking and restroom facilities.

APPENDIX:
ECOTOURISM IN THE ALBEMARLE-PAMLICO REGION OF NORTH CAROLINA

The ecotourism strategy being implemented in North Carolina's Albemarle-Pamlico Region provides a case study of how a rural, lightly-populated region can enhance its economy by marketing its natural resources effectively. Like the Mullica River Corridor, Tyrrell County is an area that many travelers drove through on their way to a popular destination—in this case, the Outer Banks. The area contained two wildlife management areas and a number of individual interpretive facilities, but there was no concerted effort to connect these as an identifiable "package." By adopting a plan and working together to implement it, local and federal agencies have raised the visibility of the region and have expanded economic opportunities for residents, without compromising the quality of the environment.

Tyrrell County (population 3,727) is located on the south shore of Albemarle Sound, approximately a 45 minute drive from North Carolina's Outer Banks. The county contains beautiful unspoiled natural resources and is the location of two major ecotourism destinations: the Pocosin Lakes National Refuge and the Alligator River National Wildlife Refuge. Thousands of acres in the county are protected as refuge parks or are managed as timberlands. The Partnership for the Sounds (PfS) promotes ecotourism in the Albemarle-Pamlico Region by appealing to "heritage tourists," defined as those who enjoy and appreciate the sustainable use of an area's natural, cultural, and historic resources.

Ecotourism activities in the region include canoeing, sailing, cycling, hiking trails, birding trips, photography tours, fishing, historic tours, and regional arts and crafts.[4] The Town of Columbia (population 900), located in Tyrrell County, serves as the gateway to the region and hosts the Partnership for the Sounds office, the Scuppernong River Trail, Tyrrell County Veterans Park, the Columbia Theatre Cultural Resource Center and a few art galleries and craft stores. In addition, there are five educational centers being built or renovated within the Albemarle-Pamlico Region for environmental education, research, and entertainment. Two of these facilities are located in Columbia.

- *North Carolina Estuarium.* This facility opened in December 1997 and focuses on the Albemarle-Pamlico estuarine system and the Tar-Pamlico River, describing how they function and how they both influenced and been influenced by human activity. The facility contains an auditorium, deck and lab area along the waterfront of the Pamlico River.

- *Walter B. Jones Center for the Sounds.* Located in Columbia, this area serves as a gateway to the region's national wildlife refuges, with an emphasis on the pocosins (freshwater wetlands) and blackwater rivers that characterize the northern peninsula. The Scuppernong River Interpretative Boardwalk and the Outdoor Classroom

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[4] Information regarding the activities and education centers in the area were adapted from the Partnership for the Sounds brochure entitled *The Most Enchanting Rendezvous with Your Heritage: Environmental Mystique and Hidden Heritage of the Albemarle-Pamlico Region.*

allow hiking in adjacent wetlands. The Scuppernong River Interpretative Trail is a 3/4 mile, handicapped accessible trail which loops through bottomland swamp. The trail contains 14 interpretative sites to explain the workings of the blackwater swamp ecosystem.

- *Lake Mattamuskeet Lodge.* The facility is listed on the National Register of Historic Places and is being renovated for research and educational purposes. The focus of the center is primarily on migratory waterfowl and the Atlantic Flyway.

- *Roanoke/Cashie River Center.* This center will interpret the floodplain forest and wildlife of the lower Roanoke River as well as the management of important river watersheds. The Cashie River Wetlands Trail allows hiking in nearby wetlands.

- *Columbia Theatre Cultural Resources Center.* This center contains exhibits that explore human interaction with the environment in the Tyrrell County area, especially as reflected in the history of farming, fishing and forestry.

An ecotourism strategy was developed for Tyrrell County in 1993 as a result of the creation of the Pocosin Lakes National Wildlife Refuge.[5] The establishment of the Wildlife Refuge provided an opportunity for conservationists and local leaders to consider ways in which Tyrrell County could capture economic benefits from the preservation of the region's natural environment. The purchase of the land for the Refuge and the construction of the Center for the Sounds Visitor Center in Columbia represented a significant investment of outside capital in Tyrrell County. At the time the report was prepared, Tyrrell County was not recognized as a tourism option to visitors and services for tourists were therefore limited. The report also emphasized that Tyrrell County alone would not be able to provide the range of activities required by most groups targeted for ecotourism. Therefore, cooperation and integration with the attractions within the region would be critical to its success.

The key agency in implementing the plan is the Tyrrell County Community Development Corporation (CDC). The CDC plays a lead role in organizing local support for and participation in the implementation of the ecotourism strategy. It also serves a broker for business support and philanthropic investment programs that exist throughout the state. The non-governmental status of the CDC allows it to leverage private philanthropic capital with public grants and assistance that local leaders have been able to secure. The development opportunities fall into three categories:

1. Direct services and concessions that can be provided to people interested in the natural environment and cultural history of the area.

2. Opportunities that arise from the county's location on the path to other tourist attractions.

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[5] *Ecotourism in Tyrrell County: Opportunities, Constraints, and Ideas for Action.* Prepared for The Conservation Fund; United States Fish and Wildlife Service; Tyrrell County; Town of Columbia; Tyrell County Community Development Corporation. Prepared by John Anton, Caroline Davis and Chuck Teller with Dr. Edward Bergman; Institute for Economic Development, University of North Carolina, Department of City and Regional Planning. February 1993.

3. Secondary services demanded by tourists that stop and visit the Center for the Sounds and Columbia.

The report focuses on the direct development opportunities related to the Center for the Sounds such as nature tourism, canoe trails, bird watching tours, hiking trails, environmental education, etc. but also addresses the development of supporting services such as retail shops, restaurants and overnight accommodations to support ecotourism. Suggested strategies to promote these secondary uses include the following:

- The CDC should promote infrastructure improvements to demonstrate to entrepreneurs that the community is interested in investing in its future.

- Marketing and design of the downtown area will be critical for the success of local merchants. Design guidelines and zoning regulations will become more important as development continues. The report suggests working with the Main Street Program through the National Trust for Historic Preservation.

- The Town must determine the appropriate business mix as it expands as this will have an impact on the customer's perception of the area.

- Determine the type of handicrafts that can be sold and how they can be effectively marketed. The CDC could develop a local artisan/craftsman task force to address these issues.

- Make use of the CDC's ability to provide business development assistance through technical assistance and business training; access to capital; and market information.

The Partnership for the Sound's Visitor Center in Columbia opened in October 1995. It is situated in a strategic location along Route 64 which enables it to serve as a focal point for information and promotion of ecotourism in the Albemarle-Pamilco Region, as well as to tap into the market of motorists who are driving through on their way to the Outer Banks of North Carolina. Between October and December of that year, approximately 75,000 people visited the Center. Over the past three years, an average of 488,000 visitors have stopped at the Visitor Center each year.

According to the North Carolina Department of Commerce, Division of Tourism, Film, and Sports Development, domestic tourism generated an economic impact of $2.49 million on Tyrrell County in 1997. This is a 2.4% increase over 1996. However, during the same time period, there was a 2.9% increase in economic impacts resulting from tourism for the State of North Carolina. Furthermore, the amount of tourism economic impact in Tyrrell County is among the lowest in the State (98th out of 100 counties). These numbers may seem low, but it is important to note that Tyrrell County is the least populated county in North Carolina (3,727), and that in the early 1990s the County was not considered a tourism option.

Indicators of ecotourism's economic impact in Tyrrell County include the following:

- *Jobs:* Twenty jobs in Tyrrell County can be directly associated with travel and tourism (1996). Although the county's unemployment rate of 8.4% in 1997 was among the highest in the State, it represents a significant drop since 1990, when 14% of the county's labor force was unemployed. The employment change in Tyrrell County between 1995 and 1996 was among the highest in the State at 8.9%.

- *Tax Revenues:* State and local tax revenues from travel to Tyrrell County amounted to $310,000 in 1997, an increase from $280,000 in 1995.[6]

- *New Businesses:* The new business rate in 1996 was 11.0% just under the state rate of 12.2% but still more than 57 other counties.[7]

[6] North Carolina Department of Commerce, Division of Tourism, Film and Sports Development.

[7] North Carolina Department of Commerce, 1998 County and Regional Scans.

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