

Arts & Culture Baseline Topic Report

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1 Executive Summary

Arts and cultural development are good for sustainability, and vice versa. Arts and cultural activities tend to thrive in compact environments, fit easily within existing infrastructure, and enhance the quality of life of residents in a wide variety of ways. Moreover, arts and culture entrepreneurs and organizations can adapt to almost any built environment and in every community have the raw resources -- ideas, heritage and people -- to be sustainable. Creating environments that lead to more arts activities and cultural expression can significantly further the goals and objectives of Together North Jersey (TNJ).

The Together North Jersey region offers a strong environment for arts and culture. Easy access within the region as well as New York and Philadelphia by rail and bus, makes it possible to attract both consumers and talent. (Having at least one international airport within an hour's travel provides access to the world.) Organizations and arts professionals have a large and receptive market in the Together North Jersey region. Residents here are more likely than others in New Jersey to go to theaters and museums, and enjoy music.ⁱ As a result, the creative and cultural sectors employed at least 171,000 people throughout in the Together North Jersey area in 2010 (the last year for which complete figures were available at the time of this research). This actually undercounts the total amount of arts and cultural activities in TNJ. There are countless more people in New Jersey who paint, draw, perform or engage in other arts as a hobby. And there are a wide variety of organizations and workers in every industry who are engaged in the creative and cultural economies.

Arts-related organizations, who make up what we call the creative sector, and their counterparts who promote local histories and cultures, who we call the cultural sector, face significant challenges for their growth. Among them: having more stable and equitable access to funding; keeping consumer dollars in the region in the face of competition from New York and Philadelphia; finding affordable housing and space for creative and cultural professionals near thriving cultural centers; and in the western and southern part of the region, having access to more patrons.

This report provides two key dimensions of information for decision-making. It explores current conditions and trends facing the creative and cultural sectors, thereby providing baseline measures for future evaluation. It also offers key policy recommendations to enhance these sectors in ways that support the goals and objectives of the Together North Jersey Regional Plan for Sustainable Development (RPSD).

Our analysis of the creative sector found that Together North Jersey has a strong potential to grow arts and culture, but that the sectors appear to be facing substantial headwinds.

Like other industries, arts and culture thrive when they have easy access to customers, labor and resources. The creative sector also relies on ideas, and more of these tend to be generated in areas where large, diverse groups of people come together regularly. Cultural organizations succeed where they can attract enough people who enjoy their offerings, either because they share the heritage or they find it new or exotic. As a result, arts and cultural organizations, attractions and professionals tend to cluster in places that are more compact, have relatively larger concentrations of people, and that are either culturally diverse (in the case of the arts) or have a significant population of people who share the same heritage and interests (in the case of cultural facilities).

The TNJ region offers all of the above -- in some cases, to a greater extent than regional destinations such as western North Carolina and northern New Mexico. TNJ has an extensive public transit network - at least in the near New York suburbs and virtually every community has an area of compact development with facilities that can support arts and culture. New Jersey is one of the wealthiest and most diverse states in the United States, and much of that wealth and diversity lies in TNJ. It also attracts a great deal of tourism. According to the state's travel and tourism office, New Jersey attracted 82.5 million visits in 2012, a 4.8% increase since 2011.ⁱⁱ Residents of TNJ are more likely to visit art museums and go to the theater than other Americans. There are at least 103 foundations and three state agencies in New Jersey that support arts and culture.

This has helped lead to a surge in the numbers of freelance artists, writers and performers, as well as arts and culture organizations with at least one employee between 2000 and 2010 (the last year for which complete statistics were available). More than 40% of creative sector organizations in 2010 have at least 5 employees, which shows that many are strong enough to weather economic downturns. There was substantial employment growth in some industries, such as fine arts schools, musical groups and music producing industries, and personal beauty services, not including freelancers, the number of creative sector workers was growing steadily between 2000 and 2008. Growth continued even through the mild recession in the early part of the decade-- another indicator of the sector's strength and resiliency.

In several industries, the drop in employment likely had more to do with economic and social trends than factors within New Jersey. Camera and supply stores and book publishers were hurt by new technologies, and demand for architectural services dropped dramatically around the country in the most recent recession. All but three counties in the region saw a growing number of creative sector establishments with at least one employee.ⁱⁱⁱ Ocean and Somerset counties -- which are not home to large arts and culture destinations -- had among the highest percentage growth in creative sector establishments and also had a growing number of employees in the last decade.

On the other hand, the growth in freelance creative sector professionals lags behind the United States average. Creative sector organizations saw a 16% drop in their numbers of workers between 2008 and 2010. Eight of the 13 counties in the region saw a drop in creative sector workers (not including freelancers), in some cases by as much as 14%. Employment in film production dropped by half, and there was a substantial drop in employment in the design industries.

New Jersey does less than some other states and regions to support arts and culture. One county in Pennsylvania and seven in the Denver metropolitan area appear to provide far more financial support than the entire state of New Jersey does. States such as Louisiana, Maryland and New Mexico provide a wider array of institutional support and financial incentives for arts and culture to flourish.

To help grow the creative and cultural sectors in ways that support the goals of Together North Jersey, we recommend the following strategies:

- *Develop a wider variety of financial tools, such as enhanced tax increment financing, tax credits and cooperative purchasing programs to help creative and cultural sector organizations grow -- especially in traditionally underrepresented areas.*
- *Encourage the growth of arts in targeted investment areas and innovation districts.*
- *Enhance the promotion of arts and cultural attractions in the region, particularly in the Jersey Shore and the Delaware River counties.*
- *Foster entrepreneurship in creative and cultural sectors.*
- *Expand commuter, light rail and bus rapid transit services throughout the region.*
- *Integrate public and private mass transit with car/bicycle sharing initiatives through service scheduling, pricing, etc.*
- *Promote arts in regions, not just districts to encourage collaboration among arts organizations and municipalities.*
- *Promote tools for cross-sector collaboration such as creative teams, Creative New Jersey convenings and community coaching.*
- *Create a statewide cultural district program, similar to that in Maryland and Louisiana, to promote arts and culture in downtowns and 'main streets.'*
- *Improve access to arts by supporting programs to develop more arts programming in schools, community centers, senior centers and healthcare facilities.*
- *Promote affordable housing for creative and cultural sector professionals to improve access to opportunity, reduce overall costs of transportation and housing, and make for more vibrant communities.*
- *Enhance efficiency and conserve land by redevelopment more vacant and underutilized properties for arts-related activities.*
- *Develop more historic sites and art that celebrate New Jersey's natural features.*
- *Promote workforce development strategies to help more New Jersey residents get jobs and careers in arts and culture.*
- *Require municipal master plans and county cultural plans to be connected.*

Arts and culture provide important benefits to the region's economies and communities. The more that community, regional and statewide leaders can support the creative and cultural sectors, the easier it will be to achieve their sustainability goals.

2 Introduction

This report provides practical knowledge to help decision-makers connect the pursuit of sustainability with the development of arts-related activities and products and the enhancement of local cultures. The following report reflects both current research and years of study by the authors of the creative and cultural sectors in New Jersey.

There are three key parts to this report:

1. A discussion of how arts and culture can be measured for public decision-making
2. An analysis of conditions and trends affecting the creative sector in the region
3. A discussion of objectives and strategies to support the goals of Together North Jersey

2.1 Key terms used in this report

Because arts and culture are defined in so many ways, it is important to have a glossary of terms.

- An **economic sector** is a group of businesses, organizations involved in similar or complementary range of activities. The Department of Commerce calls these organizations industries. Government statistics separate out industries with at least one employee from “non-employer” industries, such as sole proprietorships and partnerships where all work is performed by the owners (or contracted out). We call the non-employer organizations “freelancers”.
- **Creative sector** refers to a set of organizations and entrepreneurs who are primarily involved with the design, manufacture and distribution of products whose market value comes primarily from their aesthetic appeal. All of their work, as well as related work from other types of organizations, constitute the creative economy.
- **Cultural sector** refers to a set of organizations and entrepreneurs who are primarily involved with the promotion of human cultures within societies. All of their work, as well as related work from other types of organizations, constitute the cultural economy.
- **Creative placemaking** is a form of sustainable and comprehensive planning that connects the development of arts and culture with economic and community development.

2.2 Defining arts and culture for public decision-making

Artists in New Jersey have complained for years about feeling undervalued by public officials in their communities. Part of this may be because, unlike other sectors of the economy, the “arts” have been difficult to measure, much less define.

We want to avoid the trap of trying to measure creativity. Though the term ‘creative class’ is popular among some who promote the arts, we reject the implication that only certain people in a society are creative. There is creativity everywhere in every community. Anyone who finds a new way to fix a problem or generates a new idea is creative. What we can do is measure the outputs of creativity in the marketplace, as well as the number of people who are involved in designing, producing or distributing these outputs.

To provide a basis for reliable measurement, we define the arts as a set of industries involved in goods and services whose primary market value comes from their aesthetic appeal. In other words, if the price of an object or service (such as music or a performance) is based more on how it makes the buyer feel

than how useful it is, it falls into the realm of the arts. To avoid the question of ‘what is art,’ we use the term ‘creative sector’ throughout the report.

Organizations and businesses involved in this sector are called creative sector establishments. (A self-employed artist is included as a type of establishment.) Information on establishments include all workers in the establishment, whether or not they are directly involved in the arts. This report contains information on creative sector industries and employment by county and in the region as a whole.

Those people who are directly involved in artistic professions -- such as architects, dancers and designers -- are counted in an inventory of creative sector occupations. This includes individuals working in creative sector and other types of industries. Because of the way occupational information is reported, the information on occupations is provided by metropolitan area.

While this helps us measure business activity, it does not pretend to provide a precise measure of arts activities. Many creative products, such as an impromptu song or a homemade gift -- go uncounted and unrecorded in any reliable census. There are a large number of people who practice some form of art as a hobby. There are occasional surveys, but its unclear how many amateur artists and artisans are counted. Some people may get some income from their work. But unless they set up a creative sector business or list their primary job as a creative sector occupation, these people tend to go unrecognized in valid and reliable inventories.

Of course, almost anything can have aesthetic appeal to someone. And it seems that almost every type of material available to humans has been used to create art. But if we were to include every establishment, there would be no way to measure the creative economy. As a result, some industries that create products that are considered aesthetic are excluded from this inventory. Full service restaurants are in the inventory because customers pay for more than food; the prices charged reflect the value of the ambience, music or entertainment, and the aesthetic presentation of the food. Supermarkets sell some prepared foods that have aesthetic appeal, but for most, their main sources of income come from selling food for its utilitarian value (as nourishment or ingredients.)

We believe that there is no way to accurately measure all the creativity and arts in a community, just as there is no way to count all of the animals and plants living in a rainforest. The best approach, then, is to identify ‘indicator’ businesses and occupations, that like indicator species in ecology, that help us gauge the overall health of the creative sector.

Because we are counting indicator species, we are more concerned with trends over time in counties and industries, as well as the distribution of industries in counties, than we are with absolute numbers.

This is a common technique used by reputable data gathering organizations, such as Americans for the Arts and the New England Foundation for the Arts (NEFA).^{iv} But everyone, including ourselves, have a different number of variety of industries in their creative sector inventory.

Our inventory identifies 67 creative sector industries that are ‘indicator species’ for arts and culture. (Because arts and culture are so intertwined, this inventory is also a good proxy for the cultural sector.) This is a smaller universe than that used by the NEFA and others. The others, we believe, tend to be overly expansive in their selection. For example, NEFA has historically included gypsum manufacturers in its inventory. While gypsum is used for making plaster for statues, most of it is used for making sheetrock, which most people would consider more utilitarian than aesthetic. *The inventory of*

industries and occupations is in Appendix 1.

We also measure trends in establishment and employment growth for the period from 2000 to 2010. The number of establishments and their employees in any given year can be affected by a number of factors, such as the recent recession. By looking over a decade that included some of the strongest and weakest economies in a lifetime, we can make better judgments about the future of the creative sector as a whole.

In addition to measuring organizations, we also inventory the professionals who are part of what many people may think of when hearing the term ‘creative class’.

Culture is even more difficult to measure than arts. In social science terms, a culture is a shared set of values and beliefs of a community, which are expressed through current behaviors and the preservation of objects and traditions that represent the culture.

What makes culture particularly difficult to define is that while the creative sector produces products for sale -- which means they can be measured in economic terms -- culture tends to produce experiences that cannot be easily measured.

Culture is reflected in festivals, heritage areas and historic districts. It is ingrained in the beliefs and behaviors of local residents. And it is institutionalized in local laws and government practices that ultimately reflect values -- the building blocks of culture -- within a community.

We can measure culture in part by the number of historic districts, heritage sites and festivals. But this at best covers the tip of the iceberg, and only represents the cultures of those people who are organized and influential enough to get public support.

This report focuses largely on the creative sector because 1) it is much easier to measure than culture and 2) art tends to respond to the culture of the place in which it is created. There have been calls at the state level to develop a cultural heritage programmatic inventory for the state but until that’s tracked and available, researchers are limited in their ability to measure this area.

The creative and cultural sectors are so interconnected that it is extremely difficult, if not impossible to draw precise lines using current economic data. For example, the Department of Commerce does not distinguish between arts, history or natural science museums in its categories. And it is virtually impossible to determine how much of a particular artist’s production reflects her culture and how much is a pure leap of the imagination.

So our discussion of the creative sector is also a proxy for cultural activities.

In this report, we use the term “arts and culture” to describe both the creative and cultural sectors in TNJ.

2.3 How arts and culture support the goals of Together North Jersey

The Together North Jersey plan identifies a set of five goals and more than two dozen objectives for sustainability in the region. The five goals are:

- Strengthen the region's economy
- Ensure communities are safe, healthy, great places to live
- Improve everyone's access to opportunity (good jobs, quality public schools, shopping and housing that is reasonably priced)
- Enhance efficiency and conserve land
- Protect and enhance the environment

Arts and culture help further these goals in various ways. For example, they:

- Strengthen the region's economy in various ways: By adding jobs, especially in communities that are not already job centers; attracting and retaining knowledge economy businesses, such as biotechnology firms; providing talent to teach workers critical skills for the 21st century -- such as creative problem-solving; enhancing tourism destinations; expanding the range of new opportunities and markets for entrepreneurs; and diversifying local economies.

In Frenchtown, a hamlet on the Delaware River, there are at least 32 creative sector businesses, which make up nearly 29% of the 112 listed in a local business directory.^v The arts are part of a long-term recovery effort in Long Beach Island to protect their economy when future storms threaten island beaches. The number of jobs grew between 2001 and 2011 in Frenchtown and Asbury Park -- two communities that have never been business centers. Jobs in Asbury Park increased nearly 20%, from 8,750 to 10,460, and 6% in Frenchtown, from 840 to 890.

The arts have been shown to help prepare students for the workforce. Students in high schools that offered more arts instruction tended to have higher levels of language arts literacy. Students who took any art courses tended to perform better on the SAT exam than their peers. In other words, these students were better at communications -- perhaps the most critical skill for any workforce.^{vi}

- Promote the use of existing infrastructure because organizations, artisans and cultural entrepreneurs are more likely to use existing facilities before generating new ones. The Art Factory -- various art uses in what was once a mostly vacant set of warehouses near downtown Paterson -- and the Showroom -- an independent movie theater that started off in a vacant shoe store in downtown Asbury Park -- are a couple of hundreds of examples of how arts and cultural organizations take advantage of underutilized infrastructure in densely developed communities.
- Promote cross-sector collaborations. In Atlantic Highlands, Long Beach Island, Perth Amboy, New Brunswick, Monmouth County, Orange, Morristown, and other communities, artists have been involved in comprehensive planning efforts to promote community and economic development, as well as improve conditions for creative and cultural expression.
- Promote safe, stable neighborhoods by attracting new capital and new social investment in blighted areas. While arts development can lead to the displacement of low and moderate-income people and businesses over time, the early presence of arts and cultural activities can attract other types of businesses and services that can help existing residents. The Valley Arts District in Orange has helped leverage arts to revitalize a blighted community while also increasing the supply of quality housing. The Mayo Performing Arts Center in Morristown and New Jersey Performing Arts Center in Newark are among several that provide local children with

more access to arts. Youth exposed to arts and cultural activities tend to do better in school than their peers.

- Support the use of public transportation and provide incentives to promote inclusive, diverse neighborhoods. Arts and cultural activities tend to cluster in transit-oriented areas. Places that are more tolerant and welcoming of different cultures -- such as gay-friendly Asbury Park -- can attract more creative sector professionals and cultural entrepreneurs. Paterson's Little Lima enclave is a cultural tourism destination for Peruvians -- not just those living in New Jersey, but also from Peru itself.
- Enhance the conservation of land by clustering in compact, densely populated areas. Arts and cultural activities lead to increased investment near housing, jobs and transportation, as well as maintain vibrant downtowns and main streets. The development of the South Orange Performing Arts Center in South Orange led to a new, downtown supermarket, and dozens of condominium units within a five-minute walk of the train station.^{vii} Until the last decade, Rahway was a traditional middle-class streetcar suburb of New York, known primarily for being the home of Merck, a major pharmaceutical company. The city's efforts at increasing the presence of arts led in 2008 to the 100-room Hotel Indigo, which was built by a multinational chain corporation that normally locates its hotels in major cities.^{viii}
- Protect and enhance the environment in a variety of ways. Most commonly, cultural entrepreneurs, artists and the arts make people aware of the beauty of natural and urban environments. Several years ago, an event in downtown Cranford involved artists painting landscapes of the area while residents and visitors walked past. The demonstration showed that Cranford's downtown is worthy of art. In the western, northern and Shore areas of the region, arts that reflect and use natural materials help reinforce the value of natural environments to residents and visitors. The arts are an excellent way to teach children and residents about protecting environments and recycling materials. In Newark, South Street Elementary School teachers engaged students and community residents in a project to create a mural using 10,000 bottle caps. The mural -- a version of Vincent Van Gogh's "Starry Night" -- was on display at the Newark Museum in spring 2013. West Orange Township is working to make recycling more fun and attractive through its "Art of Recycling" initiative. This is an effort to paint recycling bins throughout the township.^{ix}

2.4 How this report was developed

This report reflects both current information and years of research on the creative sector in New Jersey.

In 2008, the staff of what is now The National Consortium for Creative Placemaking (NCCP) began exploring why some communities in New Jersey were more successful than others at not only attracting the arts, but also integrating them into the fabric of their communities. That led to a combination of wide-scale statistical research on the economic health of the creative sector; focus groups and interviews with elected officials, urban planners and other placemaking professionals, and artists and arts administrators; observations of communities that had relatively high concentrations of arts, and participatory action research.

The leadership of Together North Jersey recognized that arts and culture are an important element of overall sustainability. Plansmart NJ was tasked to develop an analysis of arts and culture in the region

and policy recommendations to support the Together North Jersey plan. With funding support from the Geraldine R. Dodge Foundation, Plansmart NJ partnered with The National Consortium for Creative Placemaking to develop the report.

To this end, we:

- Mapped various types of arts and culture facilities and districts in the region, including the locations of museums, libraries, art galleries, performing arts centers, movie theaters and historic districts.
- Reviewed and updated the definition of the creative sector developed by Arts Build Communities, a predecessor to NCCP, to conduct statistical research on arts and cultural organizations. Defining the creative sector in ways that can be tracked by the United States Department of Commerce helps researchers measure change in the sector over time and compare results among counties. The database used for this research was County Business Patterns, one of the most widely-used tools in economic analysis. County Business Patterns provides information about the number of establishments (individual businesses or organizations) in an industry, employees in the industries, annual and quarterly payrolls, and the number of establishments by size (as measured by the number of employees.) County Business Patterns provides information on both establishments that have employees, and what the database calls ‘non-employee’ establishments. These are micro-business such as sole proprietorships and partnerships that have owners, but no employees. The non-employer database is especially important for tracking the number of freelance artists, writers and performers. County Business Patterns contains information on both for-profit and non-profit organizations.
- Reviewed information on participation in the arts provided in the Americans for the Arts’ Local Arts Index database. This is the only index that measures participation in various forms of arts activities at the county level.
- Analyzed relationships between participation in the arts and factors such as median income and education, which were derived from the U.S. Census Bureau.
- Mapped the relationships between the presence of arts activities in the region and such factors as population densities and access to public transit.
- Engaged arts administrators, urban planners, and other professionals involved with arts and culture in a brainstorming session in April to recommend practical research topics on the connections between arts, culture and sustainability.

3 Overview and analysis of the creative sector in Together North Jersey region

This section provides a birds-eye view of the creative sector in TNJ between 2000 and 2010.

3.1 Size of the creative sector and trends over time

In the last decade, the overall creative sector in TNJ saw tremendous growth in organizations, but employment was stable. In 2000, there were 27,800 establishments and freelancers. By 2010, there were 32,000, an increase of 4,200 (15%). The number of workers went from 171,200 in 2000 to 170,900 in 2010, a drop of 300 (about .1%).

This disparity largely reflects the growth of freelancers and the increased ability of organizations to use technology to replace some human labor. For example, though there has been a growth in the numbers of workers in musical groups; organizations representing independent writers, artists and other performers; and book printing, there has been a decrease in workers in book stores and art dealers.

Another reason is the effect of the recession in the last part of the decade. The creative sector in Together North Jersey was growing gradually -- and for some industries rapidly -- from 2000 to 2008. In the past decade, the creative sector in Together North Jersey had been growing gradually, until the recession of 2008. By 2010, the number of freelancers in the sector was growing. We would expect employment in the rest of the sector to grow as well as the economy grows.

Of the 67 industries in the creative sector, 22 either had a growing number or stable of workers in the past decade. Not including freelance writers, artists and performers; the fastest growing industries in the sector, by number of employees are:

- Full service restaurants (9,400 more employees since 2000, a 16% increase)
- Hair, nail and skin services (5,600; 42%)
- Fine arts schools (1,372; 68%)
- Digital printing (695; 473%)
- Integrated record production and distribution (305; 277%)

The industries with the largest decline in employees are:

- Commercial lithographic printing (6,000 fewer employees, a 50% decrease)
- Publishers besides book and periodical publishers (-1,338; -86%)
- Commercial screenprinting (-1,293; -51%)
- Florists (-1,138; -43%)
- Quick printing (-1,079; -65%)

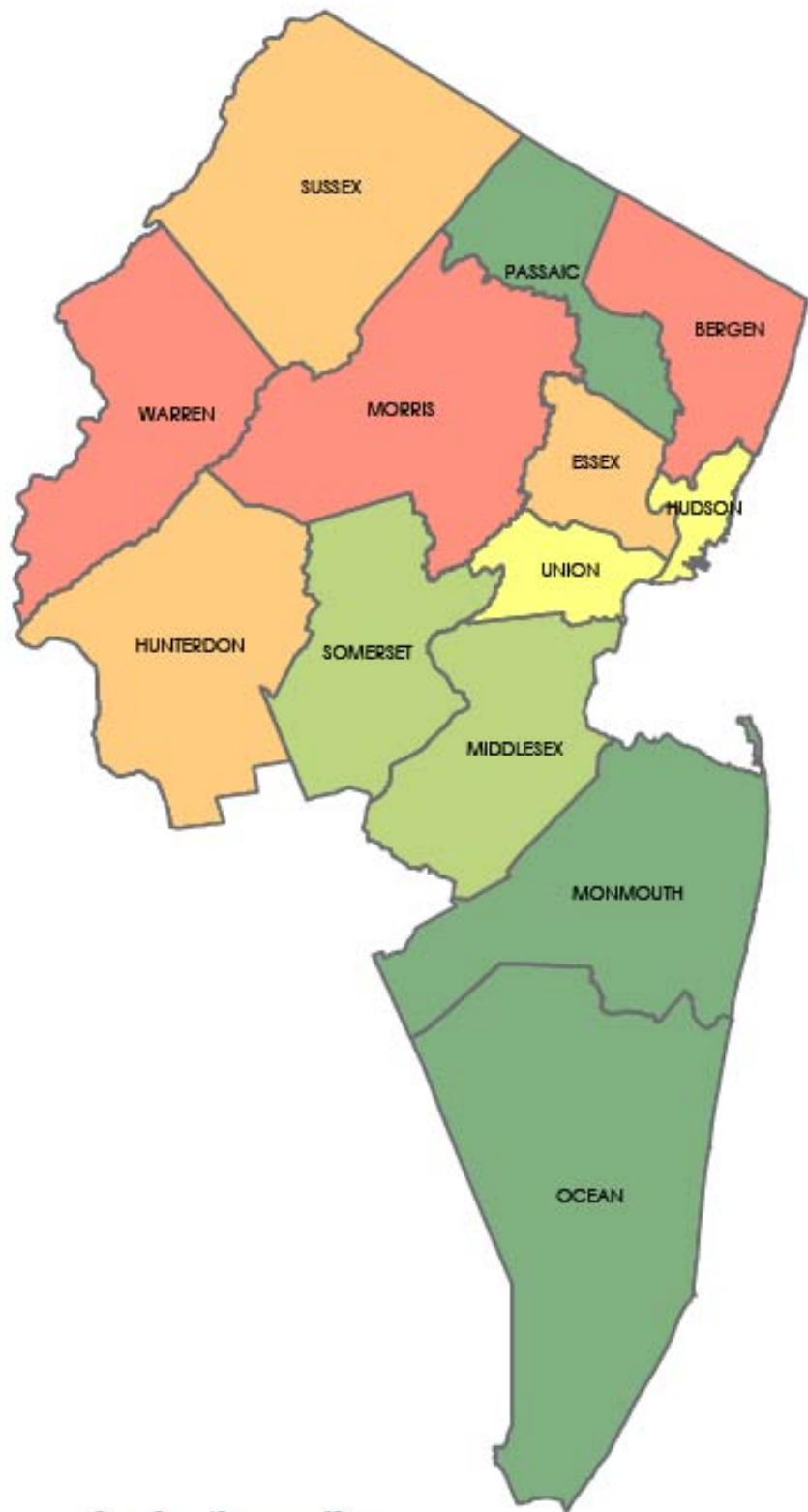
Among what might be considered the traditional industries in the creative sector, there was an increase in the numbers of people working in musical groups; organizations that support the work of independent artists, writers and performers; theater companies; and book printing.

There was a decline in the numbers of people working for dance companies, motion picture production, book stores and art dealers.

More information about changes in the industries can be found in Appendix 5.

3.2 Geographic distribution

Map 3.1 Percent Change in Creative Sector Establishments, 2000-2010



0 5 10 20 Miles

Source: U.S. Census Bureau, County Business Patterns

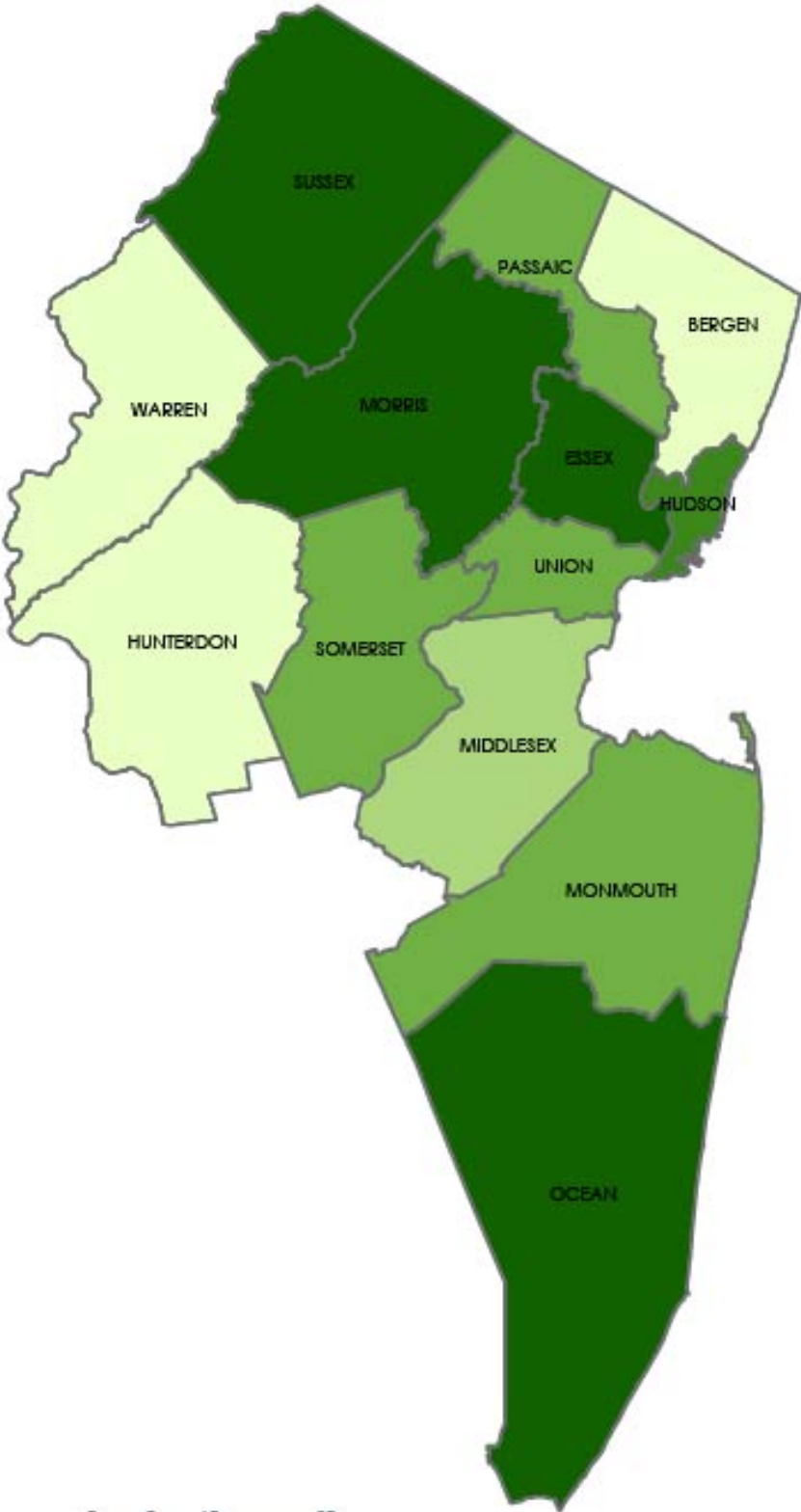
TOGETHER
**NORTH
JERSEY.**

**Percent Change in
Creative Sector
Establishments**

- 7% - -2%
- 1% - 2%
- 3% - 8%
- 9% - 12%
- 13% - 19%



Map 3.2 Percent Change in Freelancers, 2000-2010



0 5 10 20 Miles

Source: U.S. Census Bureau, County Business Patterns

TOGETHER
**NORTH
JERSEY.**

**Percent Change in
Creative Sector
Self-Employed Artists**

- 12% - 16%
- 17% - 19%
- 20% - 27%
- 28% - 32%
- 33% - 39%



Arts and cultural activities are present throughout TNJ. But, as might be expected, they tend to be concentrated in areas with more people, more ethnic and cultural diversity, more areas with compact development, and more access to public transportation.

In 2010, more than half of all creative sector activity was concentrated in five counties in Together North Jersey. About 56% of freelancers were in Bergen, Essex, Hudson and Monmouth counties. More than 58% of creative sector establishments with at least one employee were in these counties and Middlesex. These establishments had more than 60% of the workers in the sector.

By contrast, Ocean, Sussex and Warren counties together had less than 10% of freelancers, establishments with employees, and workers in those establishments.

This indicates that within TNJ, there are two major types of creative economies. The first -- found primarily in Bergen, Essex, Hudson, Middlesex and Monmouth counties -- is an established market, with a large number of creative sector establishments and freelancers. The second -- found primarily in Ocean, Somerset and Sussex counties -- is an emerging market. These counties have the smallest concentrations of creative sector activities, but have also seen significant growth in freelancers, creative sector workers and establishments.

Hudson County shows signs of being both an established and growing market, while Warren County is small and appears to have had little growth. (Warren, Bergen, and Morris counties were the only ones to have had both a decline in employee-based establishments and employees in those establishments in the past decade. Warren County also had the second-smallest increase in freelancers.)

Throughout the decade, Bergen County had the largest concentration of freelancers, creative sector establishments with employees, and workers in those types of establishments. But Bergen County did not have any more than 20% of the concentration in any of these indicators.

More information about the change in creative sector establishments, by county can be found in Appendix 2 and Appendix 3.

The distribution of freelancers is a good proxy for the distribution of the creative sector. Freelancers generally have more flexibility in terms of space needs than employee-based organizations, and therefore we would expect them to be more responsive to changes in the environment. Between 2000 and 2010, the counties seeing the largest increases in freelancers were Essex (666), Hudson (534), Morris (357) and Monmouth (312). The counties with largest percentage increase were Morris (39%), Ocean (36%), Sussex (36%), Essex (36%) and Hudson (32%).

New Jersey lags behind Louisiana, Maryland, New York and Pennsylvania in the growth of freelancers.

Table 3.1 Freelance Independent Writers, Artists and Performers

<i>County</i>	<i>Change 2000-2010</i>	<i>Percent Change</i>
Bergen	292	12%
Essex	666	36%
Hudson	534	32%
Hunterdon	54	16%
Middlesex	198	19%
Monmouth	312	26%
Morris	357	39%
Ocean	222	36%
Passaic	178	27%
Somerset	156	27%
Sussex	93	36%
Union	191	24%
Warren	25	16%
TNJ	3278	26%
New Jersey	4162	26%

Source: United States Department of Commerce, County Business Patterns

More information about the change in freelancers in TNJ can be found in Appendix 3.

With better access to resources, consumers and labor, creative and cultural sector organizations can grow throughout the region. Many communities do not have large performing arts or cultural centers that can serve as cultural anchors. But many communities have libraries. Over the past decade, libraries throughout the United States have taken on bigger roles as informal community and cultural centers. Information on the location libraries in TNJ region can be found in Appendix 6.

All communities in TNJ have cultures and subcultures, whose beliefs and practices can be reflected in cultural events and the arts.

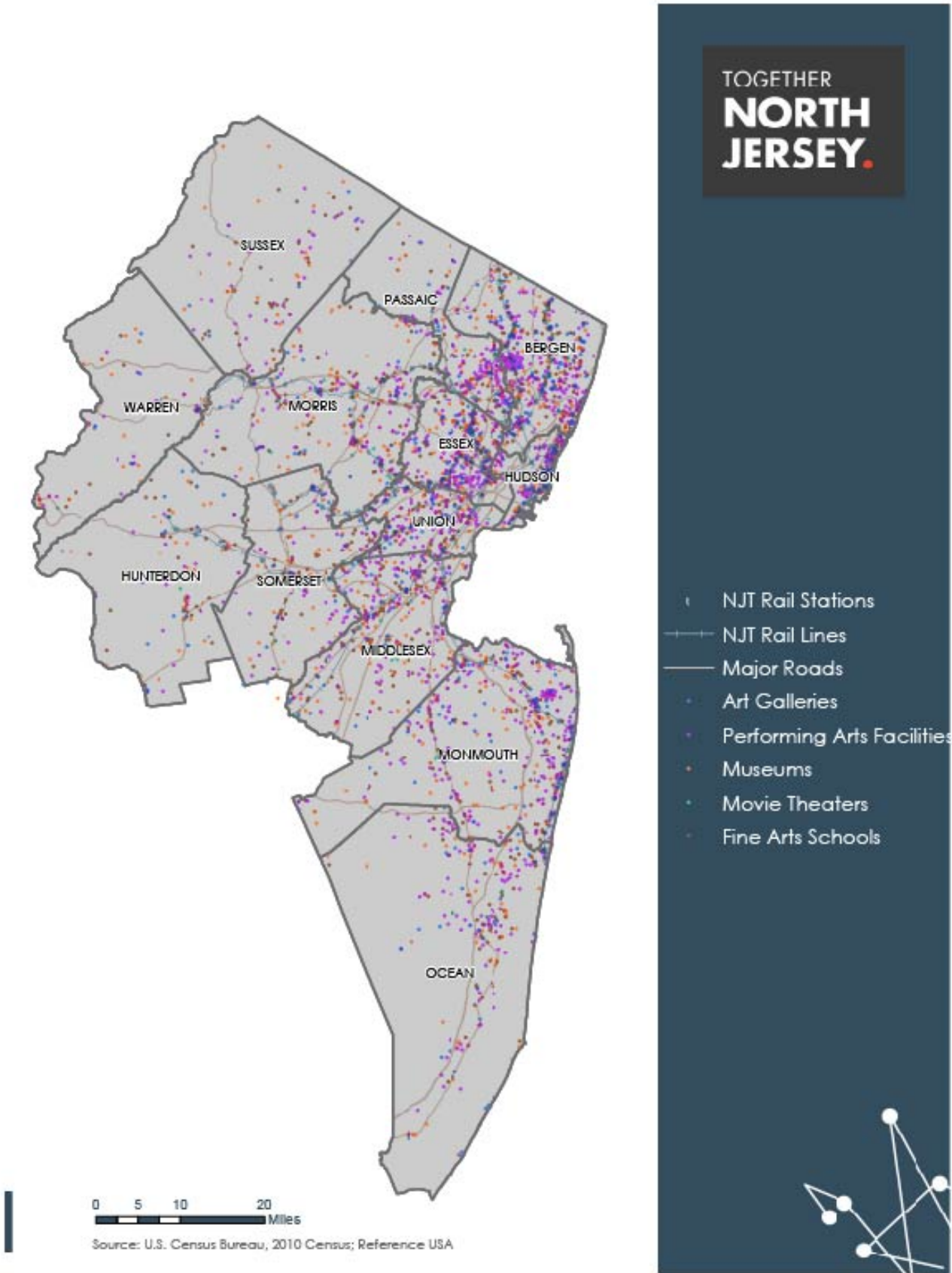
Increasing access to and distribution of mass transit in the region could also have a significant impact on how arts and culture grow. In the third weekend of May 2012, NJ Transit recorded its second-highest weekend of train ridership and fourth-highest weekend in overall public transit ridership in its history. There were two major music festivals -- Bamboozle in Asbury Park and the Electric Daisy festival at MetLife Stadium. (The New Jersey Devils also were in the National Hockey League playoffs that weekend.)^x

Sitting between two international centers of arts and culture, Together North Jersey faces both opportunities and challenges for improving its creative climate. We have found that creative sector organizations tend to cluster in communities with nearby mass transit options, so the region's rail and bus networks make for a key draw for cultural entrepreneurs. But the communities in TNJ compete with New York and Philadelphia -- in addition to one another -- for businesses, consumers, talented labor and revenue-generating activities.

As we will discuss later in the report, there are a number of ways to enhance the creative climate in New Jersey. They include:

- Promoting wider use of tax increment financing to create more revenue for creative sector organizations.
- Encouraging more place marketing, especially along transit routes
- Promoting more collaborative planning between arts professionals and others involved in the development of places.
- Encouraging even more collaborations among creative sector organizations
- Integrating creative placemaking into local master planning

Map 3.3 Cultural Assets in Together North Jersey Region



3.3 Participation in arts-related activities

According to an Americans for the Arts survey for 2009 to 2011, TNJ residents are more likely to attend live performing arts, visit art museums, download music and attend movies compared to residents in other parts of New Jersey. TNJ residents are less likely to attend popular entertainment, such as music concerts or comedy clubs.

The difference is sharp in some cases. While 40% of TNJ residents surveyed said they attended a theater performance between 2009 and 2011, only 35% of residents outside TNJ did. About 15% of TNJ residents visited an art museum, compared to 12% of other New Jersey residents. On the other hand, 21% of South Jersey and Mercer County residents attended live popular entertainment, compared to 19% of TNJ residents.^{xi}

Within TNJ, arts participation appears to be strongest in Bergen, Middlesex, Monmouth and Union Counties. In these counties, residents are more likely to participate in arts activities compared to their neighbors in TNJ or around the state. Residents of Essex, Hudson and Somerset counties have a higher than average participation performing arts, museums, music downloads and movie going, but are less likely to attend popular entertainment. Sussex County has a higher than average level of participation in performing arts and museums, but a lower than average level of participation in other activities mentioned above.

Only two counties have levels of participation that are consistently lower than both TNJ or the state as a whole: Ocean and Passaic. Information was not available for Hunterdon and Warren counties.

Table 3.2 Cultural Participation in TNJ compared to all of New Jersey

	<i>Average in TNJ Region</i>	<i>State of NJ Total</i>
Adult population share attending popular entertainment, 2009-2011	19.3%	21.5%
Adult population share attending live performing arts, 2009-2011	40.1%	35.3%
Adult population share visiting art museums, 2009-2011	15.1%	12.4%
Adult population share visiting zoos, 2009-2011	19.5%	22.2%
Adult population share purchasing music media or online, 2009-2011	14.5%	13.7%
Adult population share attending movies, 2009-2011	50.0%	47.8%

Source: Americans for the Arts, Arts Index USA

It is unclear why TNJ residents in general are more likely to participate in arts activities than other New Jersey residents. The sheer number of arts activities in TNJ is likely a big factor. Given that the near-New York suburbs are more expensive to live in than other parts of New Jersey, and jobs are spread out throughout the region, it is likely that access to the arts is one of the reasons people move to and stay in the area.

This would help explain the relatively low levels of arts participation in Passaic and Ocean Counties. They have fewer creative sector establishments and are farther away from major cultural centers in New York, Philadelphia, Newark, Morristown and Red Bank.

4 Analysis of creative sector

With a few exceptions, arts activities in TNJ tend to cluster in densely-populated areas that have ready access to mass transit. Many of the largest arts organizations in the region are within easy a ¼-mile of a NJ Transit stations: New Jersey Performing Arts Center and the Newark Museum in Newark; the Mayo Performing Arts Center in Morristown; the Count Basie and Two River theaters in Red Bank; and the Union County Performing Arts Center in Rahway. Asbury Park's Paramount Theater is farther away, but its connecting road, Cookman Avenue, is lined with galleries, restaurants, and boutiques.

To a large extent, arts activities that are not located near train lines tend to be in downtown areas. The Bergen Performing Arts Center is in the center of downtown Englewood. Even the Surflight Theater, on sparsely populated and low density Long Beach Island, anchors one of the densest areas of the island.

Among the TNJ communities with the most significant concentrations of arts activities are:

- Asbury Park
- Belmar
- Clinton
- Cranford
- Englewood
- Flemington
- Frenchtown
- Hoboken
- Jersey City
- New Brunswick
- Newark
- Montclair
- Maplewood
- Orange
- Paterson
- Rahway
- Red Bank
- Somerville

The two most significant factors in the distribution of arts activities appear to be population density and being near public transit facilities (such as train stations). We also considered whether a community's median income or median age was connected to the concentration of arts activities, but did not see clear connections.

There are a few isolated arts centers, such as Peters Valley Craft Center in Sussex County and Riker Hill Art Park in Livingston, as well as occasional galleries that are alone along highway commercial corridors.

Movie theaters are a key exception. Though a number of them are in downtown centers -- many downtowns in TNJ have at least one -- movie theaters tended to follow the expansion of suburban areas to the west and south. As a result, a significant number of movie theaters can be found along major highway corridors.

This clustering is an important strategy for the survival and growth of arts activities. Retail organizations

such as theaters, galleries, and music clubs, rely on customers who come into their establishments. The agglomeration of activities makes it easier for smaller businesses to be more visible to customers.

Consider bookstores. Like music and video stores, brick-and-mortar bookstores have been undercut by online booksellers. Most existing stores, with the exception of the Barnes & Noble chain store and bookstores connected to universities, are based in a downtown or dense, walkable area.

The concentration of arts activities is important to the production of creative sector products. The fuel of the creative sector is ideas, which are then turned into paintings, music, performances or experiences. More people in a location tends to lead to more ideas.

5 Planning, policy and implementation context

The creative and cultural sectors get various forms of support at the state, county and local levels. At least 103 foundations based in New Jersey provide some support for the arts^{xii}; there is an influential advocacy group, ArtPride New Jersey; there are dozens of local arts councils and related organizations; and many municipal master plans have a historic preservation chapter, even though this is an optional part of the master planning process. (However, few if any, master plans say more than a few sentences about the arts in their towns.)

This section focuses on key structures, incentives, tools incorporated into New Jersey state laws. There is also a discussion of incentives being promoted by Sustainable Jersey, one of the state's most influential non-governmental organizations on matters of sustainability.

5.1 Funding

At the state level, there are four key sources of funding for arts and culture: the New Jersey State Council on the Arts (NJSCA), New Jersey Cultural Trust (NJCT), New Jersey Historical Commission (NJHC), and a 'percentage for arts' program.

The NJSCA distributes at least \$15.7 million per year to artists, artists and organizations with arts-related initiatives. NJSCA's funding is based on a tax increment financing program that draws from a portion of taxes paid by guests of hotels in New Jersey. By state law, there is a minimum funding threshold for funding for the arts through NJSCA. For several of the past few years, the NJSCA has been near that threshold.

The New Jersey Cultural Trust is funded through an endowment that by state law, should be at least \$100 million in public funds. (The amount actually put into the endowment is much less.)^{xiii}

The New Jersey Historical Commission supports history organizations and initiatives, which in many cases also support cultural activities. Its budget is determined each year by the appropriation by the State Legislature. In fiscal year 2013, it distributed more than \$2.38 million throughout the state.

Another source of funding comes through a state program that requires that at least 1.5% of budgets on state construction projects be used for public art. Over the past decade, this has had its biggest impact on NJ Transit stations and lines that were built or redeveloped.

The New Jersey Economic Development Authority provides loans, grants and technical assistance to a wide variety of organizations, including those in arts and culture.

Another form of support for the arts is the Neighborhood Revitalization Tax Credit. Businesses that give funding to nonprofits engaged in community revitalization get 100 percent tax credits on certain state taxes. At least 60% of the funding must be used for housing and economic development, and the rest can be used for social services in the neighborhood.^{xiv}

HANDS Inc., a community development corporation covering Orange and West Orange, used this program to develop the Valley Arts District in a blighted industrial district. In Newark, the Lincoln Park Coast Cultural District used the program to spearhead development projects that is finally giving legs to an arts-based neighborhood improvement plan from the 1990s. Both HANDS and Lincoln Park have now received hundreds of thousands of dollars in additional support, including from the prestigious Kresge Foundation.

Every county in New Jersey has a cultural and heritage agency that distributes grants to organizations or individual artists. The county agencies are funded primarily by the state agencies mentioned above, so the vast majority, if not all, of their funding is re-granting.

Municipalities also can and sometimes do, use money from their general budgets to support arts and cultural organizations. In 2012, the City of Jersey City appropriated more than \$718,000 to support its Division of Cultural Affairs. This represented about .14% of its 2012 budget of \$490.5 million budget.^{xv}

One of the agencies most active in supporting the arts through this initiative is NJ Transit. Through its Transit Arts Program, it has placed more than 150 works of art throughout its system.

5.2 Institutional and policy support

In addition to the state's Council on the Arts, Cultural Trust and Historical Commission, New Jersey provides institutional support for art and culture through a new Assistant Secretary of State position created in 2012. The position, now filled by Carol Cronheim, is to "help drive greater job creation across the state through New Jersey's vibrant cultural community," according to the press release announcing Cronheim's appointment.^{xvi}

The State Council on the Arts provides institutional support through several 'co-sponsored' projects. These are initiatives designed to leverage the benefits of the arts more fully in New Jersey's society and promote cross-sector collaborations. Co-sponsored projects most relevant to Together North Jersey include:

- Arts Plan NJ, which promotes a set of goals for enhancing the arts in New Jersey and promoting community and economic development
- The Alliance for Arts and Health, which promotes arts in healthcare settings to enhance the quality of medical care.
- Arts and Business Initiative, which fosters relationships between cultural organizations and local businesses.

One of the largest co-sponsored projects is Discover Jersey Arts, which promotes arts offerings

throughout the state. Discover Jersey Arts has the potential to significantly enhance sustainability through the arts. It could promote arts destinations through its website, not just institutions and artists. It could also make its database of more than 1 million households that have participated in the arts in New Jersey available to cultural, community and economic development researchers. (Or it could produce publicly-available reports that would be useful to community and economic development professionals.

County cultural and heritage agencies also provide a wide range of support. This includes promoting local arts and culture among county officials, supporting arts in otherwise underserved areas, and in some cases providing regional or statewide leadership in advancing arts and culture. The MoCo Arts Corridor is a growing effort to make coastal Monmouth County an arts and culture destination. This effort was spearheaded in part by the Mary Eileen Fournatt, the Executive Director of the Monmouth County Arts Council.

There are also several local arts councils serving individual municipalities. Some, such as the Belmar Arts Council, are independent nonprofits while others, such as the Maplewood Arts Council, are official arms of local governments.

Municipalities also can provide institutional and policy support through zoning regulations, building or providing for institutions and housing that serve the creative sector, and most commonly, by marketing local arts and culture. The cities of Jersey City and Paterson both have dedicated artists' housing, and new artists' housing is being planned for Rahway.

Creating local 'cultural districts' generally do not by themselves generate arts activities. But they are important steps in guiding policy and market decisions. Jersey City created a 'Riverview Arts District' in its Jersey City Heights section in the early 1980s. But it wasn't until a few years ago that the area became an attraction to creative professionals. Now that there is market activity towards the arts, city officials are trying to guide it through zoning. The City has created an overlay district that provides more flexibility for artists to create work/live studios in the neighborhood. Similarly, the Lincoln Park Coast Cultural District began as an idea in a plan in the 1990s. But it wasn't until earlier this decade, when a leadership group was formed to guide activities, that the district became realized.^{xvii}

On a related note, Jersey City's zoning code inherently promotes the arts by defining professional artists and their workspaces. The definition is more limited than the definition used in the report, but it does help to get the field recognized for decision-making purposes.

Besides government tools and the work of sector advocacy organizations, there is another key source of support for arts and cultural activities in New Jersey. It comes from Sustainable Jersey, one of the most influential non-governmental organizations in the state in matters of sustainable development and practice.

Sustainable Jersey has created a certification program for municipalities that uses a scorecard to judge their work. To get certified -- which brings prestige and better access to grants -- municipalities must achieve at least 150 points on 114 'actions' related to sustainability. As of May 2013, 384 of New Jersey's 565 municipalities are participating in the program.^{xviii}

There are two actions related to promoting arts and culture, and a third that is scheduled to be published in 2013. These are developing a 'Creative Team' to lead and oversee local activities that

connect arts and culture with community and economic development; conducting an inventory of creative assets; and the third, to be published, focuses on creating a ‘creative placemaking’ plan that integrates community, cultural and economic development. Together, these actions are worth 30 points, or about 20% of the amount required for certification. Because these actions were produced in May 2013, it is too soon to tell which communities will pursue them.

(Note: Leonardo Vazquez chairs the Sustainable Jersey Arts and Creativity task force that developed the actions.)

Despite all these incentives, New Jersey tends to do less than other states in supporting arts and culture. Maryland and Louisiana, for example, have cultural district programs that provide tax credits for organizations and artists in those districts.^{xix xx} New Mexico provides a tax credit for the rehabilitation of historic properties in designated cultural districts and provides technical assistance for district planning.^{xxi} Dozens of states provide tax credits for film and television production (Louisiana’s tax credits extend to live performances), as New Jersey did until its program was repealed in 2010.

5.3 Existing barriers and impediments for arts and culture growth and development and how they can be overcome

Though there are a number of incentives and forms of institutional support for arts and culture in Together North Jersey, there are also a number of challenges for the growth of these sectors. The challenges differ within the region. For example, arts and culture in the New York suburbs -- which benefit from good transportation networks, concentrations of wealth in the area, and the presence of several anchoring institutions -- are challenged by competition within the region and in New York. Ocean County and the Delaware River counties have little of the advantages that the New York suburban counties do, so their challenges primarily involve building their market base for arts and culture.

With the exception of the largest arts and cultural institutions, creative and cultural sector organizations are challenged by a lack of consistent and growing funding sources. Though the State Council on the Arts receives most of its funds through a portion of the hotel/motel tax, it’s funding has remained relatively flat despite the growing economy. In fact, as a recent investigative report reveals, the Council on the Art has been exceptionally underfunded. “After an early boost, the arts council has seen its share of funding shrink from a high of 33 percent of (hotel/motel) tax receipts in 2005 to a proposed 15 percent next year. In real dollars, this has meant a cut from \$22.7 million to \$16 million,” writes Peggy McGlone in *The Star-Ledger*. The story goes on to say that the Council on the Arts was promised at least 22.68 percent of receipts.^{xxii}

The New Jersey Cultural Trust also appears to be routinely underfunded. New Jersey lawmakers have shown they are willing to be creative with funds to protect large arts and cultural institutions, such as the New Jersey Performing Arts Center in Newark or the Old Barracks Museum in Trenton. But when funding is flat, this strategy often means taking away money from smaller organizations, many of which are in communities that do not have major cultural institutions.

In general, bigger arts institutions get more money from the New Jersey State Council on the Arts than smaller organizations or communities get. For example, in fiscal year 2013, New Jersey Performing Arts

Center, Newark Museum Association and New Jersey Symphony Orchestra each received state grants of at least \$1 million. Together, these three organizations received more public funding than all arts organizations in Bergen, Hudson, Hunterdon, Middlesex and Monmouth counties combined.^{xxiii}

There are several reasons for this. Larger organizations tend to serve more people. Some, like the New Jersey Symphony Orchestra, provide services throughout the state. Larger organizations tend to make bigger requests and have a greater ability to do more relationship marketing and publicity. For funders who have to justify their recommendations to board members and public officials who are uncomfortable with risk, a larger organization with a long track record is generally a safer investment than a newer, smaller organization.

Unfortunately, the concentration of funding in large institutions – especially those whose offerings are more likely to be enjoyed by white, wealthy, ‘city’ audiences – can perpetuate the myth that the arts are for the urban elite. Increasing the share of funding and support that goes to rural, exurban and moderate-to-low-income communities that are not traditionally centers for the arts can help address this issue. (In some cases, funders may be challenged to build the capacity of artists and arts organizations in these communities to make larger requests and manage larger grants.)

While there are at least 103 funders in New Jersey who support arts and cultural activities, they cannot be expected to provide the funding and support necessary to significantly expand arts and culture throughout the region. According to a 2011 report on arts funding across the nation, the vast majority of funding for arts and culture goes to large institutions that focus on cultural offerings for predominantly white, wealthy audiences.

Even if foundation program officers want to do more to support small and culturally diverse organizations, they must make their case to funding committees and philanthropic boards. Group decisions tend to lean to those that pose minimal risk -- and it is much safer to give money to a large, established organization run by people who are like yourself than to invest in a smaller organizations whose leaders are unknown to decision-makers.

Expanding and diversifying the sources of tax increment financing can help reduce the inequity between large and small organizations, as well as traditional and emerging arts communities. Allegheny County, Pennsylvania, has a Regional Asset District in which 1% of sales tax revenue is allocated to arts, culture and recreation. Since it was created in 1995, it has generated more than \$1.4 billion.^{xxiv} In fiscal year 2013, the district generated more than \$89 million in grants and contracts. In the Denver metropolitan area, the Scientific and Cultural Facilities District distributed about \$41.9 million to nonprofits in seven counties in 2011. Since its founding in 1988, the district has generated \$711 million on a 1% tax assessment.^{xxv}

Competition for audiences and dollars is intense among arts and culture organizations. Based on conversations the author had the director of Discover Jersey Arts, many arts organizations are protective of their audience list, and do not want to share them with audiences.

In some communities, it is not just competition that hinders the growth of arts and culture, but a lack of collaboration among practitioners. John Pietrowski, a playwright and founder of the Madison Arts Council, discovered this first hand. As he has told audiences, he and other artists would gather at a local diner to think about ways to bring more arts and artists to the small suburban town in Morris County. They soon realized that there were many arts professionals in the area, but that they didn’t know one

another, and apparently no one had brought them together before.^{xxvi}

Regional approaches can help reduce unnecessary competition, and increase productive collaboration, among arts and culture organizations. These approaches can also draw in business interests and government agencies. MoCo Arts Corridor is an example of a growing regional effort that engages multiple types of organizations, including colleges, businesses and NJ Transit. The MoCo partnership is working to make the Bayshore and Jersey Shore between Keyport and Manasquan a regional, and perhaps, national arts destination.

Having stable sources of funding is a challenge for all but the largest organizations in the creative and cultural sector. New Jersey appears to do less than other states, such as Louisiana, Maryland, New Mexico and Pennsylvania in supporting arts and culture. To make matters worse, there is a culture of funding in the arts that concentrates wealth in the largest organizations. (This appears to be a cultural problem among arts funders throughout the United States.)

This creates a ripple effect that makes it more difficult for smaller arts and cultural organizations to grow. Not only do they get less money, but decision-makers who follow financial incentives and seek to minimize risk will be less inclined to support smaller organizations and entrepreneurs.

New Jersey's home rule culture and reliance on property taxes also makes it difficult for municipalities to support the arts. Municipalities that are competing with their neighbors have little incentive to allow for greater development of arts and cultural facilities -- many of which are tax-exempt.

Building a base of consumers is a challenge for any industry. Communities along existing commuter lines have more access to more potential consumers from New York and other New Jersey communities along train lines. (Those communities along the North Jersey corridor also have the ability to attract consumers from Boston to Washington D.C.) As NJ Transit learned with the Bamboozle and Electric Daisy festival, a significant portion of arts consumers will take trains and other forms of transit, if it is available, attractive and reliable. Unfortunately, this is largely not the case in most areas of the Delaware River and Jersey Shore counties. It is unrealistic to expect mass transit to reach every communities, especially where year-round densities are low. But if public transit is better integrated with private mass transit (such as tour buses and dollar vans) or with car and bicycle sharing services, the net effect for consumers would be similar.

6 Desired long term outcomes

Together North Jersey has identified five goals and at least 25 objectives for long-term sustainability. This section proposes 15 objectives to support these goals.

The five Together North Jersey goals, and the objectives most relevant to arts and culture are:

1. Strengthen the region's economy by retaining and creating good-paying jobs; ensuring infrastructure systems are in good repair and have adequate capacity to support economic development; enhancing economic resilience and increasing regional self-sufficiency; and addressing regional growth issues in a coordinated way
2. Ensure communities are safe, healthy, great place to live by creating safe, stable neighborhoods with high quality housing, low vacancy rates, and strong demand; improving public health outcomes and reducing health disparities; improve access to community resources such as libraries, senior centers and youth activities; and improving access to arts and cultural resources and programming
3. Improve everyone's access to opportunity by improving transportation connections and choices to better link where people live and where they need to go; creating inclusive, mixed-income neighborhoods; and reducing combined transportation and housing costs.
4. Enhance efficiency and conserve land by increasing investment near existing housing, jobs and transportation; maintaining and expanding vibrant downtowns and 'main streets'; and encouraging development of compact mixed-use neighborhoods.
5. Protect and enhance the environment by directing development away from environmentally sensitive areas.

6.1 Goals and Objectives

1. Develop a wider variety of financial tools, such as enhanced tax increment financing, tax credits and cooperative purchasing programs to help creative and cultural sector organizations grow -- especially in traditionally underrepresented areas. One of the keys to growing the creative and cultural sectors in New Jersey is to attract, retain, and recirculate resources widely and equitably. Current funding models and cultures in New Jersey may encourage a slow growth in these sectors. But it is likely that most of that growth will be in established arts and culture destinations and among large institutions.

Indicators of success in this objective include:

- Expansion of tax increment financing for arts and culture beyond the hotel/motel tax.
- Development or return of financial incentives, such as tax credits used in other states.
- Increase in the percentage of state and county funding used to provide support and technical assistance to entrepreneurs, workers and organizations.
- Development of cooperative purchasing programs so that arts and culture organizations can reduce their operating costs.

In the short-term, arts and culture advocates should continue to pursue more funding from the hotel/motel tax.

2. Encourage the growth of arts in targeted investment areas and innovation districts. Development and redevelopment plans should include strategies to create galleries, performing arts spaces, spaces for street or open-air performances, or other arts-related activities. Tools such as density bonuses and neighborhood revitalization tax credits could reduce potential costs.

Indicators of success in this objective include:

- Increase in the number of creative and cultural sector organizations
- Increase in the number and median or average incomes of creative sector professionals.
- Increase in number of media reports of creative/cultural activities in New Jersey (outside of arts- or culture-oriented media).
- Increase in property values of innovation districts that involve a greater degree of arts, versus other innovation districts.

3. Enhance the promotion of arts and cultural attractions in the region, particularly in the Jersey Shore and the Delaware River counties. Tax increment financing could be used for regional marketing campaigns -- both to attract visitors from outside New Jersey and retain more arts and culture-oriented dollars in the state.

Indicators of success include:

- Increase in the number of tourists, as well as New Jersey residents who participate in arts activities.
- Increase in the number of tourists from outside of the Mid-Atlantic region to arts and culture destinations in New Jersey.
- Increase in the number of recognized creative or cultural districts, especially in the western and southern parts of the region.
- Increase in the numbers of percentage of freelance artists, writers, and performers, compared to South Jersey, other states or regions, and the United States as a whole.

4. Foster entrepreneurship in creative and cultural sectors. This can be done by developing more creative or cultural districts that would attract and support arts businesses and cultural entrepreneurs, as well as providing incentives (tax credits, technical assistance, cooperative buying programs, etc.) that will help to build a sustainable community of entrepreneurs.

Indicators of success include:

- Growth in employment and revenues of arts and culture organizations, especially in areas that traditionally have high unemployment or low incomes.
- The development of new TIF tools and districts, and the variety of distribution of TIF revenue.
- Increase in the percentage of government spending used to promote arts and culture tourism in New Jersey.
- The creation of at least one position at the state or regional levels focused on cultural heritage tourism.

5. Expand commuter, light rail and bus rapid transit services throughout the region. Commuter rail services should be expanded west toward the Delaware River and south to southern Ocean County. Light rail could be used to enhance mass transit along older highways through areas underserved by arts, culture and other economic activities. For example, a light rail line on Route 124 between downtown Newark and downtown Morristown would serve Newark's low-income West Side, Irvington and Springfield. Where light rail is not feasible, such as in Long Beach Island, encourage the development of bus rapid transit services. Finally, a new commuter rail line along the 287 corridor could support arts and cultural activities in Perth Amboy, Somerville, Morristown and Boonton, among others.

Indicators of success include:

- Increase in public transit service in areas that have above average concentrations of arts and cultural attractions.
- Expansion of commuter rail, light rail and bus rapid transit lines to areas with above average concentrations of arts and cultural attractions
- Increase in number of passengers traveling to arts and culture destinations.
- Increase in revenue from trips to arts and cultural destinations as percentage of overall revenue from transit fares.

6. Integrate public and private mass transit with car/bicycle sharing initiatives through service scheduling, pricing, etc. To encourage the use of train and bus service, NJ Transit could offer weekend day fares that allow riders to visit several arts and cultural centers along train routes.

Indicators of success include:

- Increase in the amount of space at transit stations allocated to bicycle or car sharing
- Creation of tour-based pricing structures, and increase in number of riders using them.
- The development of collaborations among public and private transit services to better integrate schedules and routes.

7. Promote arts in regions, not just districts to encourage collaboration among arts organizations and municipalities. A cooperative regional strategy in western North Carolina, called Handmade in America, helped the state generate millions of dollars in new tourism revenue and investments.

Indicators of success include:

- Increase in the number of regional collaborations and plans for regional creative placemaking
- Increase in benefits received by participating communities, as defined by community representatives

8. Promote tools for cross-sector collaboration such as creative teams, Creative New Jersey convenings and community coaching. Creative New Jersey is an independent nonprofit corporation that organizes one and two-day cross-sector gatherings to help community members explore a wide variety of issues facing their communities. These convenings have been held in a variety of communities. In Morristown, the Creative Morristown convening appears to be helping to influence the town's municipal plan. Community coaching is a program developed by the National Consortium for Creative Placemaking to engage a community in six-months of problem-solving and reflection on a creative placemaking goal. (Full disclosure: The lead author directs The National Consortium for Creative Placemaking and is on the Steering Committee for Creative New Jersey.)

Indicators of success include:

- Increase in the numbers of municipalities that pursue and receive Sustainable Jersey points for creative placemaking actions.
- Increase in the number of communities holding Creative New Jersey convenings.
- Increase in the number of communities participating in community coaching.

9. Create a statewide cultural district program, similar to that in Maryland and Louisiana, to promote arts and culture in downtowns and 'main streets.' Under the state program, areas that become recognized cultural districts would get financial, institutional and marketing support from state and county agencies. To promote cross-sector collaboration and benefits, the district should be governed by a board that includes representatives of local business and civic groups and should be required to

conduct a creative placemaking plan. To avoid concentrating too many resources in one area, at the expense of others, each district should also develop strategies for providing benefits to areas of its municipality outside of the district boundaries.

Indicators of success include:

- Creation of a statewide cultural district program
- Increase in the numbers of communities participating in the cultural district program
- Increase in performance measures of the cultural districts, as defined in the program.

10. Improve access to arts by supporting programs to develop more arts programming in schools, community centers, senior centers and healthcare facilities. There exists a number of programs that do this in New Jersey, and several are cosponsored projects of the New Jersey State Council on the Arts. The challenge, which can be addressed as mentioned elsewhere in this report, is to provide more funding in areas that are currently underserved.

Indicators of success include:

- Increase in the numbers of schools with arts programming, as well as increase in arts programming in schools.
- Increase in the numbers of students who are given access to arts and cultural activities.
- Increase by participation of residents from low-income or underrepresented communities in arts and cultural activities.
- Increase in the number of communities providing financial support to community arts and cultural programming
- Increase in the number of arts and cultural activities that reflect the diverse cultures within communities.
- Increase in the presence of public art and arts and culture activities in communities, especially planned unit communities.
- Increased ethnic and cultural diversity in the creative and cultural sector.
- Increase in the number of creative or cultural sector professionals on advisory boards, municipal commissions, or other leadership groups that are not focused on arts or culture.

11. Promote affordable housing for creative and cultural sector professionals to improve access to opportunity, reduce overall costs of transportation and housing, and make for more vibrant communities. Cultural consumers do not just buy a performance, a work of art, or a learning experience. As numerous spending studies show, consumers buy into place-based experiences. They go into restaurants and bars and enjoy being in environments with other people who appreciate or create art and culture. Promoting more affordable housing for creative and cultural sector workers can help enhance the experience for visitors. In gentrifying areas, such as Red Bank, Morristown and Asbury Park, the housing also provides support for the industries. Municipalities can support this effort in a number of ways, such as providing density bonuses or tax abatements for sector-designated units.

Indicators of success include:

- Increase in the number of affordable housing units and distribution of properties throughout the region
- Increase in overall property values in areas containing affordable housing for creative and cultural sector workers, compared to other areas.

12. Enhance efficiency and conserve land by redevelopment more vacant and underutilized properties

for arts-related activities. Throughout TNJ, there are a number of properties large enough to be catalysts for community and economic development through the arts. Among the most significant are the Art Factory in Paterson, an emerging arts center in a former industrial complex of more than 400,000 square feet near the Great Falls; and in Perth Amboy, the former Gerdau Ameristeel property on 93-acre site between the city's waterfront and the NJ Transit train station. Even properties as small as 30,000 square feet -- what is generally considered the minimum size for a community shopping center -- can be found in unlikely places throughout the region. For example, on Long Beach Island, where high land values have led to few underutilized or developable spaces, there is a vacant school building complex of 48,000 square feet on nearly four acres. Several residents involved in arts, culture and creative placemaking on the island are interested in it being used for artist residencies.

Indicators of success include:

- Increase in the numbers of underutilized or vacant properties of at least 30,000 square feet that are redeveloped in ways that substantially promote arts and culture.
- Increase in the distribution of properties redeveloped primarily for arts and culture.

13. Develop more historic sites and art that celebrate New Jersey's natural features. The Paterson Great Falls National Historic Park in Paterson is an excellent example of a site that connects the environment and New Jersey's industrial heritage and its revitalization. The Art Factory, whose buildings abut the park, will have an exit directly onto the park. The more that existing and new historic sites can connect past and present cultures as well as support the goals of their home municipalities, the more likely they are to be supported by the general population.

Indicators of success include:

- Increase in number of historic or cultural sites within the region.
- Increase in the number of sites that integrate nearby arts and current cultural activities in their programming.

14. Promote workforce development strategies to help more New Jersey residents get jobs and careers in arts and culture. There is little research in New Jersey about diversity and equity in arts and culture. But from our experience visiting cultural districts in New Jersey and attending meetings with leaders of creative and cultural sector organizations is that the majority of professionals in the field tend to be non-Hispanic White. Without further analysis, it is unclear why this is the case -- especially since the pool of artists in New Jersey is ethnically diverse. One possible reason is that business owners and organizational leaders find it easier to hire people like themselves. When owners and leaders open locations in communities in which they have few personal connections, they are unlikely to know who in the community has the skill sets to meet their business needs. Workforce development initiatives -- such as job training and matchmaking programs -- help make it more likely that residents within a community will get jobs in emerging industries.

Indicators of success include:

- Increase numbers of residents from high unemployment or low-income communities getting and keeping jobs in the creative and cultural sectors.
- Increased ethnic and cultural diversity in the managerial and executive levels of arts and culture organizations.

15. Require municipal master plans and county cultural plans to be connected. Municipalities that

want to create zoning ordinances are required to create master plans. County cultural and heritage agencies are required to prepare cultural plans. Neither governmental group is required to engage the other or respond to the other's plans. As a result, county cultural plans and municipal master plans are often disconnected. Requiring that each plan responds to the other -- municipal master plans contain sections supporting arts and culture while county cultural plans speak to how their strategies complement municipal goals -- will help enhance the role of arts and culture in promoting sustainability.

The key indicator of success is the increasing number of municipal master plans and county cultural plans -- as well as other relevant plans -- that refer and respond to one another

Table 6.1 Matrix of Together North Jersey goals and related objectives

Note: Some objectives are repeated because they further more than one goal

Together North Jersey goals and key objectives	Related strategies for arts and culture	Performance indicators
Strengthen the region's economy by retaining and creating good-paying jobs; ensuring infrastructure systems are in good repair and have adequate capacity to support economic development; enhancing economic resilience and increasing regional self-sufficiency; and addressing regional growth issues in a coordinated way	• <i>Develop a wider variety of financial tools, such as enhanced tax increment financing, tax credits and cooperative purchasing programs to help creative and cultural sector organizations grow -- especially in traditionally underrepresented areas</i> • <i>Encourage the growth of arts in targeted investment areas and innovation districts</i> • <i>Enhance the promotion of arts and cultural attractions in the region, particularly in the Jersey Shore and the Delaware River counties.</i> • <i>Foster entrepreneurship in creative and cultural sectors.</i> • <i>Promote workforce development strategies to help more New Jersey residents get jobs and careers in arts and culture.</i>	- Expansion of tax increment financing for arts and culture beyond the hotel/motel tax. - Development or return of financial incentives, such as tax credits used in other states. - Increase in the percentage of state and county funding used to provide support and technical assistance to entrepreneurs, workers and organizations. - Development of cooperative purchasing programs so that arts and culture organizations can reduce their operating costs. - Increase in the number of creative and cultural sector organizations - Increase in the number and median or average incomes of creative sector professionals. - Increase in number of media reports of creative/cultural activities in New Jersey (outside of arts- or culture-oriented media). - Increase in property values of innovation districts that involve a greater degree of arts, versus other innovation districts. - Increase in the number of tourists, as well as New Jersey residents who participate in arts activities. - Increase in the number of tourists from outside of the Mid-Atlantic region to arts and culture destinations in New Jersey. - Increase in the number of recognized creative or cultural districts, especially in the western and southern parts of the region. - Increase in the numbers of percentage of freelance artists, writers, and performers, compared to South Jersey, other states or regions, and the United States as a whole. - Growth in employment and revenues of arts and culture

		organizations, especially in areas that traditionally have high unemployment or low incomes. - The development of new TIF tools and districts, and the variety of distribution of TIF revenue. - Increase in the percentage of government spending used to promote arts and culture tourism in New Jersey. - The creation of at least one position at the state or regional levels focused on cultural heritage tourism. - Increase numbers of residents from high unemployment or low-income communities getting and keeping jobs in the creative and cultural sectors. - Increased ethnic and cultural diversity in the managerial and executive levels of arts and culture organizations
Ensure communities are safe, healthy, great place to live by creating safe, stable neighborhoods with high quality housing, low vacancy rates, and strong demand; improving public health outcomes and reducing health disparities; improve access to community resources such as libraries, senior centers and youth activities; and improving access to arts and cultural resources and programming	• <i>Enhance the promotion of arts and cultural attractions in the region, particularly in the Jersey Shore and the Delaware River counties.</i> • <i>Expand commuter, light rail and bus rapid transit services throughout the region.</i> • <i>Create a statewide cultural district program, similar to that in Maryland and Louisiana, to promote arts and culture in downtowns and ‘main streets.’</i> • <i>Improve access to arts by supporting programs to develop more arts programming in schools, community centers, senior centers and healthcare facilities.</i>	- Creation of a statewide cultural district program - Increase in the numbers of communities participating in the cultural district program - Increase in performance measures of the cultural districts, as defined in the program. - Increase in the numbers of schools with arts programming, as well as increase in arts programming in schools. - Increase in the numbers of students who are given access to arts and cultural activities. - Increase by participation of residents from low-income or underrepresented communities in arts and cultural activities. - Increase in the number of communities providing financial support to community arts and cultural programming - Increase in the number of arts and cultural activities that reflect the diverse cultures within communities. - Increase in the presence of public art and arts and culture activities in communities, especially planned unit communities. - Increased ethnic and cultural diversity in the creative and cultural sector. - Increase in the number of creative or cultural sector professionals

Improve everyone’s access to opportunity by improving transportation connections and choices to better link where people live and where they need to go by creating inclusive, mixed-income neighborhoods; and reducing combined transportation and housing costs.	• <i>Expand commuter, light rail and bus rapid transit services throughout the region.</i> • <i>Integrate public and private mass transit with car/bicycle sharing initiatives through service scheduling, pricing, etc.</i>	on advisory boards, municipal commissions, or other leadership groups that are not focused on arts or culture. - Increase in the amount of space at transit stations allocated to bicycle or car sharing - Creation of tour-based pricing structures, and increase in number of riders using them. - The development of collaborations among public and private transit services to better integrate schedules and routes. - Increase in number of visits to arts and cultural facilities, particularly those of smaller organizations - Growth in revenue by and employment in arts and culture organizations. - Increase in overall funding for arts and culture in New Jersey, and especially in areas that traditionally receive below average support in public funding
Enhance efficiency and conserve land by increasing investment near existing housing, jobs and transportation; maintaining and expanding vibrant downtowns and ‘main streets’; and encouraging development of compact mixed-use neighborhoods.	• <i>Expand commuter, light rail and bus rapid transit services throughout the region.</i> • <i>Enhance resiliency and self-sufficiency through the enhancement of tax increment financing (TIF).</i> • <i>Promote arts in regions, not just districts to encourage collaboration among arts organizations and municipalities.</i> • <i>Promote tools for cross-sector collaboration such as creative teams, Creative New Jersey convenings and community coaching.</i> • <i>Promote affordable housing for creative and cultural sector</i>	- Increase in the number of regional collaborations and plans for regional creative placemaking - Increase in benefits received by participating communities, as defined by community representatives - Increase in the numbers of municipalities that pursue and receive Sustainable Jersey points for creative placemaking actions. - Increase in the number of communities holding Creative New Jersey convenings. - Increase in the number of communities participating in community coaching. - Increase in the number of affordable housing units and distribution of properties throughout the region - Increase in overall property values in areas containing affordable housing for creative and cultural sector workers, compared to other areas. - Increase in number of master plans and cultural plans that are

	<i>professionals to improve access to opportunity, reduce overall costs of transportation and housing, and make for more vibrant communities.</i> • <i>Enhance efficiency and conserve land by redevelopment more vacant and underutilized properties for arts-related activities.</i> • <i>Require municipal master plans and county cultural plans to be connected.</i>	connected.
Protect and enhance the environment by directing development away from environmentally sensitive areas.	- <i>Redevelop more vacant and underutilized properties for arts-related activities.</i> - <i>Develop more historic sites and art that celebrate New Jersey's natural features.</i>	- Increase in the numbers of underutilized or vacant properties of at least 30,000 square feet that are redeveloped in ways that substantially promote arts and culture. - Increase in the distribution of properties redeveloped primarily for arts and culture. - Increase in number of historic or cultural sites within the region. - Increase in the number of sites that integrate nearby arts and current cultural activities in their programming.

7 Measuring progress and research recommendations

There are a number of indicators to measure the success of the creative and cultural sectors. But the key indicators are the numbers and types of people who have access to and participate in the activity or offerings; and the overall financial health of organizations.

Measuring impacts on communities is more difficult. Unless complicated (and expensive) hedonic analysis is completed, it is difficult for decisionmakers and their advisors to determine how much impact arts and culture has on communities. Many of the impacts -- such as improvements in residents' sense of quality of life -- is both subtle and difficult to accurately measure. Some economic impact studies tend to have controversial methodologies that cause even arts advocates to (quietly) question their findings.

Perhaps the best forms of measurements are those that are most useful to creative sector leaders and their advisors. In April 2013, Plansmart NJ convened more than 20 leaders from the region to offer their suggestions for future research.

Among their suggestions for measuring success in ways that support sustainability are:

Access to and impacts of arts and culture

- The accessibility of arts and cultural attractions and events by public transportation
- New Jersey residents believing that the availability of arts and culture in the area enhances their quality of life
- Representation by more ethnic and cultural groups in New Jersey in arts and culture
- The number of professional teaching artists working in schools
- The amount and distribution of public art
- The number of new restaurants around arts activities
- The number of workforce development programs connected to the creative and cultural sectors
- The cost per square foot of buildings that host creative and cultural sector organizations
- Vacancy rates in arts and culture destinations
- The number of arts programs in school

Growing the sectors

- Efforts to preserve more heritage sites
- The number and amount of existing spaces that are used for arts and cultural activities

Sustainability and resilience within the creative and cultural sectors

- The number of arts and culture organizations that have conducted disaster planning (to protect their assets and employees)
- The amount and distribution of affordable housing for artists
- Enrollment in majors that lead to jobs in creative and cultural sector organizations.
- The number of artists and arts organizations
- The availability and distribution of live/work space for the arts.

Institutional support for arts and culture

- The number of permits granted for the use of public space for fairs and cultural events
- The amount of financial and donated support provided by municipalities

- The percentage and amount of resources Destination Marketing Organizations in the region apply to promoting arts and culture

More research also should be done on the arts and culture preferences of residents within TNJ. For example, do the relatively lower levels of participation in Passaic and Ocean counties, as reported in the Americans for the Arts index, reflect a lack of demand for arts, or a lack of access to the kind of arts activities residents there would want?

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9 Appendix

1. List of creative sector establishments and occupations
2. Change over time in creative sector employment and establishments -- overall creative sector, by county
3. Change over time in freelance artists, writers and performers, by county
4. Change over time in establishments with at least one employee, by county
5. Change in employment in creative sector industries in the region
6. Map and List of Libraries in the TNJ Region

Appendix 1: List of creative sector establishments and occupations

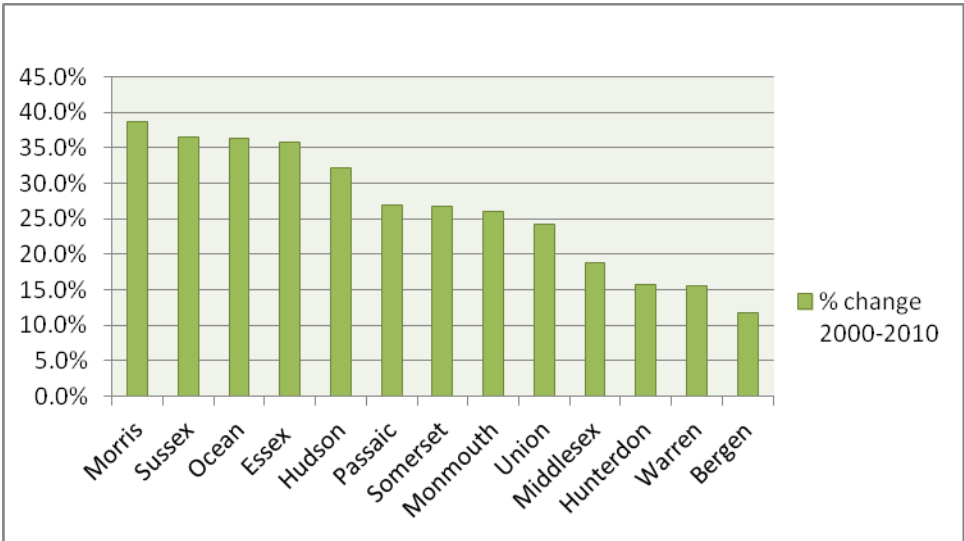
NAICS Code	NAICS Code Description	Paid Employees 2000	Paid Employees 2010	% Change
323110	Commercial lithographic printing	11931	5923	-50.36%
323111	Commercial gravure printing	170	150	-11.76%
323112	Commercial flexographic printing	380	347	-8.68%
323113	Commercial screen printing	2525	1232	-51.21%
323114	Quick printing	1651	572	-65.35%
323115	Digital printing	147	842	472.79%
323117	Books printing	609	614	0.82%
327112	Vitreous china, fine earthenware, and other pottery product manufacturing	90	40	-55.56%
327991	Cut stone and stone product manufacturing	170	240	41.18%
332323	Ornamental and architectural metal work manufacturing	559	638	14.13%
333315	Photographic and photocopying equipment manufacturing	507	160	-68.44%
337212	Custom architectural woodwork and millwork manufacturing	581	840	44.58%
339911	Jewelry (except costume) manufacturing	1278	594	-53.52%
339912	Silverware and hollowware manufacturing	265	40	-84.91%
339913	Jewelers' material and lapidary work manufacturing	250	130	-48.00%
339914	Costume jewelry and novelty manufacturing	130	78	-40.00%
339942	Lead pencil and art good manufacturing	270	475	75.93%
339992	Musical instrument manufacturing	90	150	66.67%
423410	Photographic equipment and supplies merchant wholesalers	1970	1018	-48.32%
423940	Jewelry, watch, precious stone, and precious metal merchant wholesalers	2053	1868	-9.01%
424920	Book, periodical, and newspaper merchant wholesalers	5245	4413	-15.86%
443130	Camera and photographic supplies stores	492	133	-72.97%
448310	Jewelry stores	3734	3619	-3.08%
451130	Sewing, needlework, and piece goods stores	545	487	-10.64%
451140	Musical instrument and supplies stores	780	803	2.95%
451211	Book stores	2485	2455	-1.21%
451220	Prerecorded tape, compact disc, and record stores	1456	379	-73.97%
453110	Florists	2667	1529	-42.67%
453920	Art dealers	369	242	-34.42%
511120	Periodical publishers	5356	5151	-3.83%
511130	Book publishers	6594	6357	-3.59%
511191	Greeting card publishers	245	245	0.00%
511199	All other publishers	1785	247	-86.16%
512110	Motion picture and video production	1705	843	-50.56%

512120	Motion picture and video distribution	129	101	-21.71%
512131	Motion picture theaters (except drive-ins)	3231	2651	-17.95%
512132	Drive-in motion picture theaters	0	0	0.00%
512191	Teleproduction and other postproduction services	351	255	-27.35%
512199	Other motion picture and video industries	80	30	-62.50%
512210	Record production	53	120	126.42%
512220	Integrated record production/distribution	110	415	277.27%
512230	Music publishers	46	182	295.65%
512240	Sound recording studios	169	117	-30.77%
512290	Other sound recording industries	60	110	83.33%
519120	Libraries and archives	569	320	-43.76%
532220	Formal wear and costume rental	330	127	-61.52%
532230	Video tape and disc rental	2089	1079	-48.35%
541310	Architectural services	2450	2285	-6.73%
541320	Landscape architectural services	781	513	-34.31%
541410	Interior design services	935	647	-30.80%
541420	Industrial design services	268	367	36.94%
541430	Graphic design services	1923	1265	-34.22%
541340	Drafting services	122	100	-18.03%
541490	Other specialized design services	235	130	-44.68%
541810	Advertising agencies	4121	3724	-9.63%
541850	Display advertising	622	680	9.32%
541921	Photography studios, portrait	1070	1048	-2.06%
611610	Fine arts schools	2019	3391	67.95%
711110	Theater companies and dinner theaters	983	1026	4.37%
711120	Dance companies	160	146	-8.75%
711130	Musical groups and artists	617	757	22.69%
711190	Other performing arts companies	217	60	-72.35%
711510	Independent artists, writers, and performers	697	802	15.06%
712110	Museums	1122	1048	-6.60%
712130	Zoos and botanical gardens	100	50	-50.00%
722110	Full-service restaurants	59986	69427	15.74%
81211	Hair, nail, and skin care services	13409	19041	42.00%

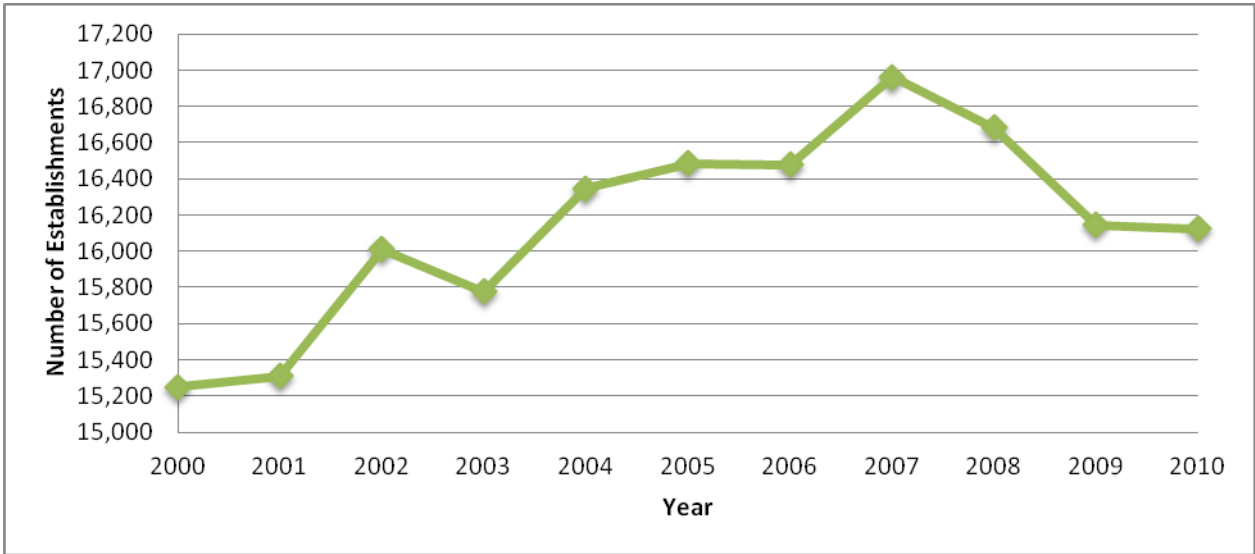
Appendix 2: Change over time in creative sector employment and establishments -- overall creative sector, by county

County	2000	2010	abs change	% change
Bergen	5,554	5,774	220	3.8%
Essex	3,605	4,296	691	16.1%
Hudson	2,774	3,402	628	18.5%
Hunterdon	691	751	60	8.0%
Middlesex	2,527	2,907	380	13.1%
Monmouth	2,827	3,377	550	16.3%
Morris	2,455	2,783	328	11.8%
Ocean	1,531	1,924	393	20.4%
Passaic	1,538	1,842	304	16.5%
Somerset	1,360	1,597	237	14.8%
Sussex	557	657	100	15.2%
Union	2,007	2,263	256	11.3%
Warren	397	405	8	2.0%
TNJ	27,823	31,978	4,155	13.0%

Appendix 3: Change over time in freelance artists, writers and performers, by county



Appendix 4: Change over time in establishments with at least one employee, Together North Jersey region



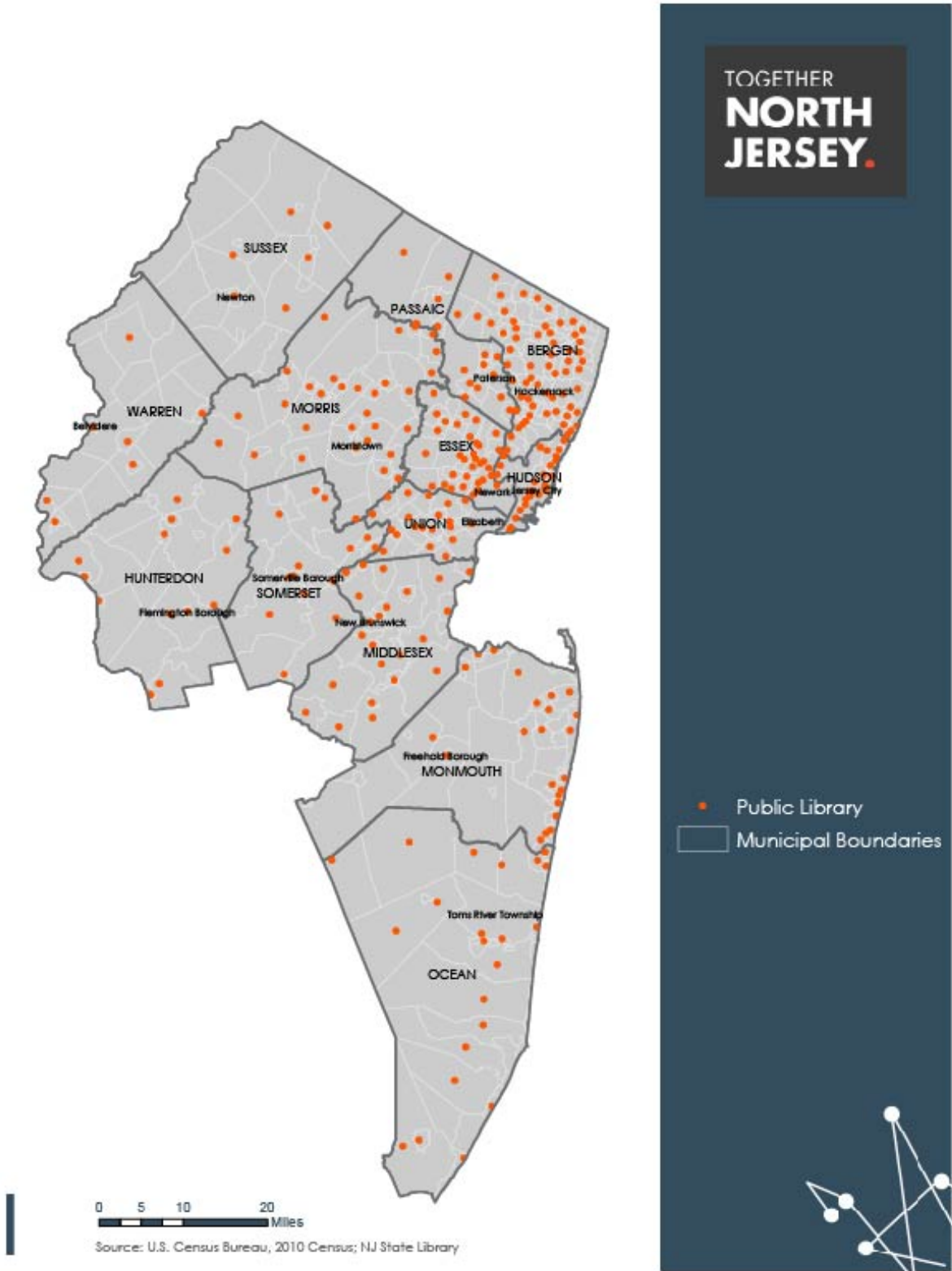
Appendix 5: Change in employment in creative sector industries in the region

Table 2 Change in creative sector establishments (both employer and freelance) in the TNJ region, 2000-2010

County	2000	2010	abs change	% change
Bergen	5,554	5,774	220	3.8%
Essex	3,605	4,296	691	16.1%
Hudson	2,774	3,402	628	18.5%
Hunterdon	691	751	60	8.0%
Middlesex	2,527	2,907	380	13.1%
Monmouth	2,827	3,377	550	16.3%
Morris	2,455	2,783	328	11.8%
Ocean	1,531	1,924	393	20.4%
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Somerset	1,360	1,597	237	14.8%
Sussex	557	657	100	15.2%
Union	2,007	2,263	256	11.3%
Warren	397	405	8	2.0%
TNJ	27,823	31,978	4,155	13.0%

Source: US Census, County Business Patterns

Appendix 6: Map and List of Libraries in the TNJ Region



9.1 Endnotes

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^{xxvi} This is a story that the principal author of this report has heard Mr. Pietrowski recount at least twice.