DRAFT
REVISED

JUNE 1975
AUGUST 1975

THE RESORT ECONOMY OF CAPE MAY COUNTY, N.J.

1974 UPDATE

PREPARED BY THE CAPE MAY COUNTY PLANNING BOARD.

The purpose of examining the economy of Cape May County is to determine what, if any is the relationship between the economy and land use. If there is a relationship, then some important questions must be answered. What is the resort economy and how big is it? Who benefits from the economy and to what degree? Are there any dis-benefits? Once questions like these have been answered, the resulting data can be used as guidelines to maximize the benefits of any land use/resort economy relationship.

The data in this report will show that the economy of Cape May County is one which is highly seasonal and based almost totally on the recreation/tourist industry.

How much of a relationship is there between this resort economy and land use? Table I shows the assessed valuation of land in the County for the years 1963, 1970 and 1973 and how much of this land value is directly and indirectly invested in the resort economy. As the Table shows, through the years, roughly 60% of the land value in the County is directly invested in the resort economy. Indirect investment is difficult to calculate but, combined with direct investment, it is estimated at 90% of the land value of the County. Also, since the island communities account for 2/3 - 3/4 of all the developed land in the County, then resort land uses must account for at least 60% of all the developed land as well as 60% of the ratables in the County. Obviously there is a strong relationship between land use and the economy of the County.

Since the resort industry is a dominant land user in the County, then some indication of the "health" of this economy can be derived from looking at the increase in assessed valuation of the County. As Table II and Plates I and II show, the assessed valuation of land in the County has

TABLE I

ASSESSED VALUATION AS A MEASURE OF INVESTMENT IN RESORT INDUSTRY (IN $1,000,000's)

	1963	% County Total	1970	% County Total	1970-Adjusted* For Inflation	1973	% County Total	1973-Adjusted* For Inflation
Direct Investment [1] In Resort Economy	$340	60%	$551	64%	$429	$802	61% [2]	$543
Direct and Indirect [3] Investment in Resort Economy (90% of County Value)	$507	90%	$770	90%	$600	$1,179	90%	$798
Total Assessed Valuation	$564		$856		$667	$1,309		$887

* These represent 1970 and 1973 figures that have been adjusted to their equivalent 1963 dollar value by using the Consumer Price Index to reduce these figures to 1963 dollar buying power value.

1. A direct investment is a property which exists solely for, or because of, the tourist industry such as a hotel or motel, a summer home, a seasonal retail store or a campground.

2. The direct investment in the resort economy shows a drop from 1970 to 1973 of 3% (down from 64% to 61%). This was a result of the methodology used to calculate what portion of commercial ratables are due to direct investment in the resort economy. The methodology is based on the Cape May County Planning Board estimate of the 1973 summer and winter population. The Board's projections for the years 1970 through 2010, assume that the permanent winter population is, and will be, growing at a faster rate than the summer transient population. This results in a larger portion of commercial ratables being attributed to the permanent (non-resort) population each year.

3. An indirect investment is a property which exists partially for or because of the tourist industry such as a year round retail outlet, private home of a person employed in tourist industry or commercial fishery.

Data Sources: 1970 Bureau of the Census, Cape May County Board of Taxation (Abstract of Ratables)

TABLE II

ANNUAL INCREASE IN ASSESSED VALUATION FOR CAPE MAY COUNTY

	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974
Millions of Dollars	564	583	604	634	690	741	789	856	972	1110	1309	1626
Percent Increase		3.4	3.6	4.9	8.9	7.4	6.5	8.5	13.6	14.1	18.0	24.2
1963 Dollars		574	585	598	633	649	656	690	723	802	887	985
Percent Increase		1.8	2.0	2.1	5.9	2.5	1.0	5.3	4.7	11.0	10.6	11.0

TABLE III

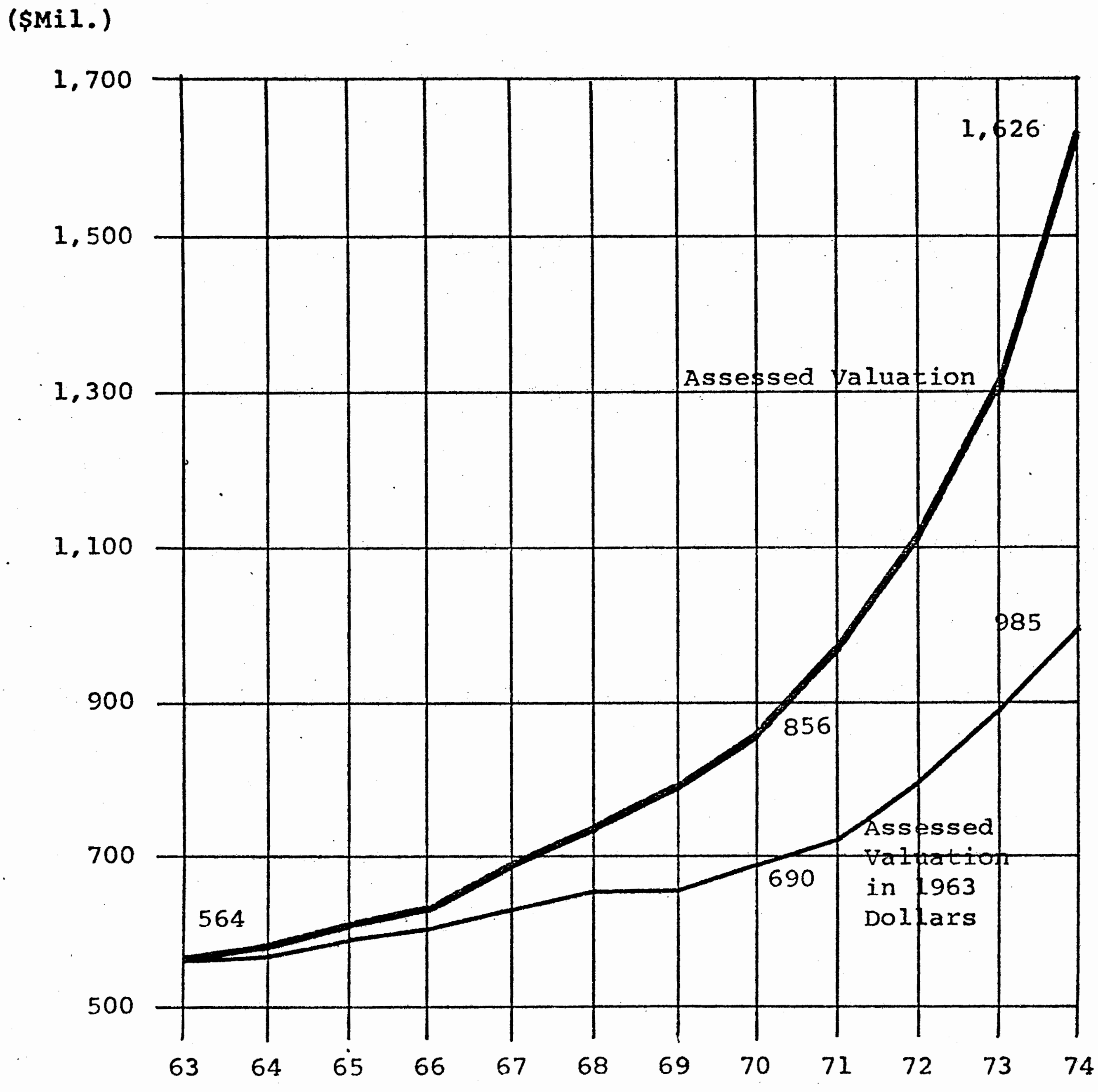
REAL ESTATE TAXES FROM RESORT INDUSTRY (IN $1,000,000's)

	1963	% Total Taxes	1970	% Total Taxes	1970-Adjusted* For Inflation	1973	% Total Taxes	1973-Adjusted* For Inflation
Taxes from direct investment in resort economy	$6.8	61%	$16.4	64%	$12.8	$19.9	61%	$13.5
Taxes from direct and indirect investment in resort economy	$10.1	90%	$22.9	90%	$17.9	$29.3	90%	$19.8
Total Taxes	$11.2		$25.5		$19.9	$32.5		$22.0

* These represent 1970 and 1973 figures that have been dajusted to their equivalent 1963 dollar value by using the Consumer Price Index to reduce these figures to 1963 dollar buying power value.

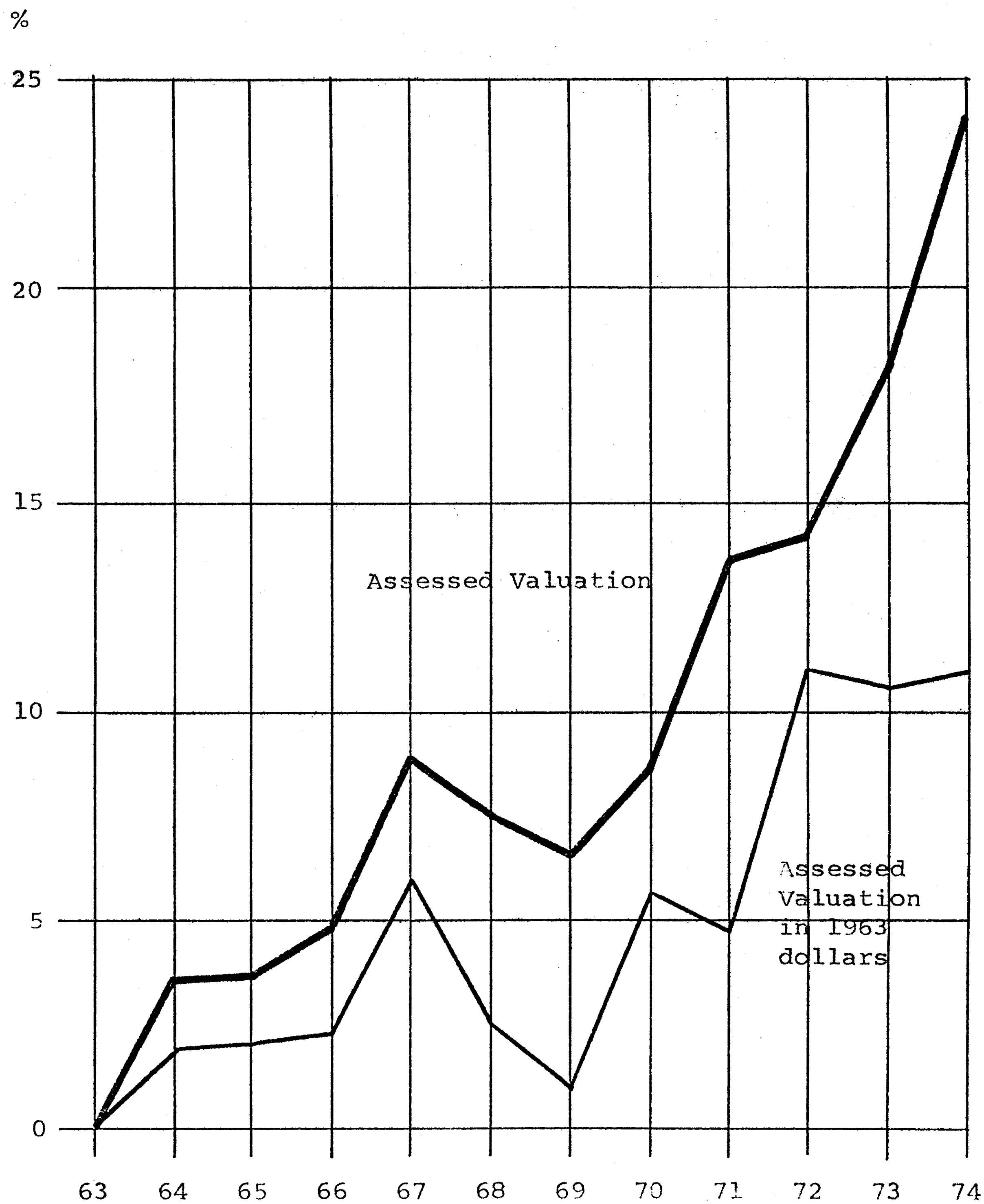
Data Source: Cape May County Board of Taxation - Abstract of Ratables

Annual Increase in Assessed Valuation Plate I
Cape May County
1963 - 1974



Data Source: Cape May County Board of Taxation - Abstract of Ratables

Annual Percentage Increase in Assessed Valuation Plate II
Cape May County
1963-1974



Data Source: Cape May County Board of Taxation - Abstract of Ratables

been growing at an increasing rate. The annual increase in assessed valuation jumped from 3.4% in 1964 to 24.2% in 1974. During this time, the assessed valuation of the County increased by 288% from $564 million in 1963 to $1,626 million in 1974. Even taking inflation into account, the annual rate of increase in assessed valuation went from 1.8% in 1964 to 11.0% in 1974. Simultaneously, the total assessed valuation increased by 175%, from $564 million in 1963 to $985 million in 1974.

One of the direct benefits of the resort economy/land use relationship is the real estate taxes collected by local municipalities. Table III shows the revenue raised in this manner. Just as resort economy land uses directly account for 60% of the land value, and directly and indirectly for 90% of the land value, so does it account for 60% and 90% respectively, of the real estate taxes collected. Thus, in 1973, of $32.5 million dollars in taxes collected, the resort economy directly accounted for $19.9 million and directly and indirectly for $29.3 million.

One of the best measures of the resort economy is the tourist dollars it brings into the County. Table IV shows total retail sales for the County for the years 1950, 1960, 1970 and 1973. Also shown is what portion of the retail sales is due to tourist spending. Tourist retail sales increased from $18.8 million dollars in 1950 (35% of total retail sales) to $122.2 million dollars in 1973 (46% of total retail sales). (It should also be remembered that a sizeable portion of retail sales generated by non-tourist can be attributed to maintenance of the resort economy infrastructure.) This represents an increase in direct tourist retail sales of 548% in the 23 year period or 23.8% a year. Even counting for inflation (using 1963 as the base year) tourist retail sales increased from $24.3 million in 1950 to $78.2 million in 1973. This is an increase of 222% or 9.7% per year. When tourist retail sales for 1973 are combined

TABLE IV

TOURIST RETAIL SALES

	1950	% Total	1960	% Total	1970	% Total	1973	% Total
Tourist Retail Sales	$18,846,481	35	$43,727,940	48	$90,376,328	53	$122,153,323	46
Total Retail Sales	$54,391,000		$92,117,000		$170,973,000		$265,724,000	
In 1963 Dollars	$24,264,844		$43,006,235		$71,692,450		$ 78,213,938	

RENTAL INCOMES FROM TOURISTS[1]

Dwelling Units	Motels and Hotels	Campgrounds	Total
$54,446,400 [2]	$61,959,600 [3]	$3,162,900 [4]	$119,568,900

TOTAL OF RETAIL SALES AND RENTALS: $241,722,223

1. Counts of Dwelling Units, Motel & Hotel Rooms & Campsites were obtained from municipal tax records
2. 36,297 seasonal Dwelling Units at $1,500/season = $54,446,400
3. 22,944 Motel & Hotel rooms at $2,700/season= $61,959,600
4. 10,543 Campsites at $300/season = $3,162,900

Data Sources For Retail Sales: New Jersey Department of Labor & Industry with the estimates of rental income shown in Table IV for 1974, the total tourist spending in the County is $242 million dollars. Considering a lot of miscellaneous spending not covered by these two items, it can be safely estimated that the resort economy directly produces between $250 and $300 million dollars annually in Cape May County.

Using data from tax records on various types of tourist accommodations and estimating average lengths of stay and average number of persons per accommodation, it is estimated that approximately 4½ million tourists visit Cape May County annually. This means that the average tourist spends between $56 to $67 dollars (per capita) during their stay in the County. Thus, the resort industry produces a very strong dollar importing economy for the County and to a lesser extent for the State, since many of the tourists are from out of State. In sales tax alone, the State receives around $12 million annually from the tourist trade in Cape May County.

The one major drawback to a tourist industry based economy is the extreme seasonality of the employment pattern which it produces. Table V gives employment data by class of resident job, by month for the years 1970 and 1974. This data is illustrated graphically on Plates III and IV.

There is a two-fold increase in employment between winter and summer with almost all the increase occurring in the wholesale, retail and service areas. These three categories are directly related to the tourist industry.

The problem of seasonal unemployment is shown in the data for 1974 where the number of unemployed doubles from summer to winter (3,100 to 6,000). Some caution, however, should be taken when discussion what has been called the County's "critical" unemployment problem. Unemployment figures are usually given in percentages and this can be very deceptive. Using the 1974 data, the unemployment rate goes from 6.7% in August

TABLE V

CAPE MAY COUNTY LABOR FORCE

1974	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Civilian Work Force	27,200	27,200	28,300	28,700	31,200	41,100	45,800	46,200	36,200	28,400	29,400	29,500
Unemployed	6,000	5,700	5,500	5,100	3,100	3,500	3,200	3,100	3,200	3,500	6,300	7,300
Employed	21,200	21,500	22,800	23,600	28,100	37,600	42,600	43,100	33,000	24,900	23,100	22,200
Seasonal**	9,520	9,930	11,070	11,740	15,820	24,570	29,190	29,740	20,840	12,970	11,550	11,050
Non-seasonal*	11,680	11,570	11,730	11,860	12,280	13,030	13,410	13,360	12,160	11,930	11,550	11,150

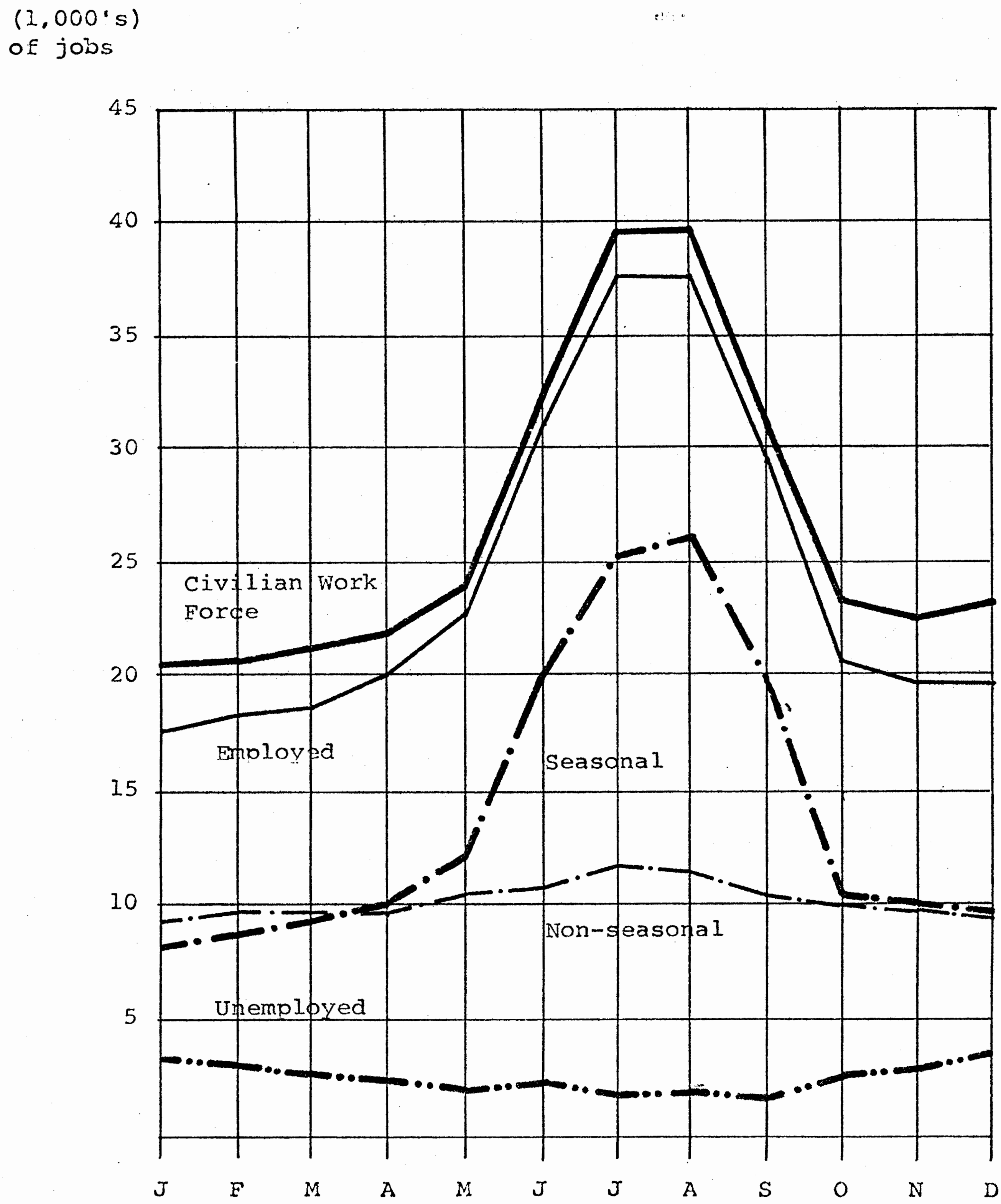
*Includes all manufacturing of durable and non-durable goods, agriculture, contract construction, transportation, communications, utilities, finance, insurance, real estate, government and all other non manufacturing.

** Includes wholesale, retail, service(excluding domestic), and all other non-agricultural employment.

1970	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Civilian Work Force	20,500	20,700	21,300	22,100	24,700	33,000	39,200	39,300	31,000	23,100	22,500	22,900
Unemployed	3,100	2,900	2,600	2,300	2,000	2,100	1,900	1,900	1,800	2,600	2,800	3,500
Employed	17,400	17,800	18,700	19,800	22,700	30,900	37,300	37,400	29,200	20,500	19,700	19,400
Seasonal**	8,170	8,410	9,080	9,840	12,200	19,800	25,550	25,810	18,550	10,630	9,880	9,730
Non-seasonal*	9,230	9,390	9,620	9,960	10,500	11,100	11,750	11,590	10,650	9,870	9,820	9,670

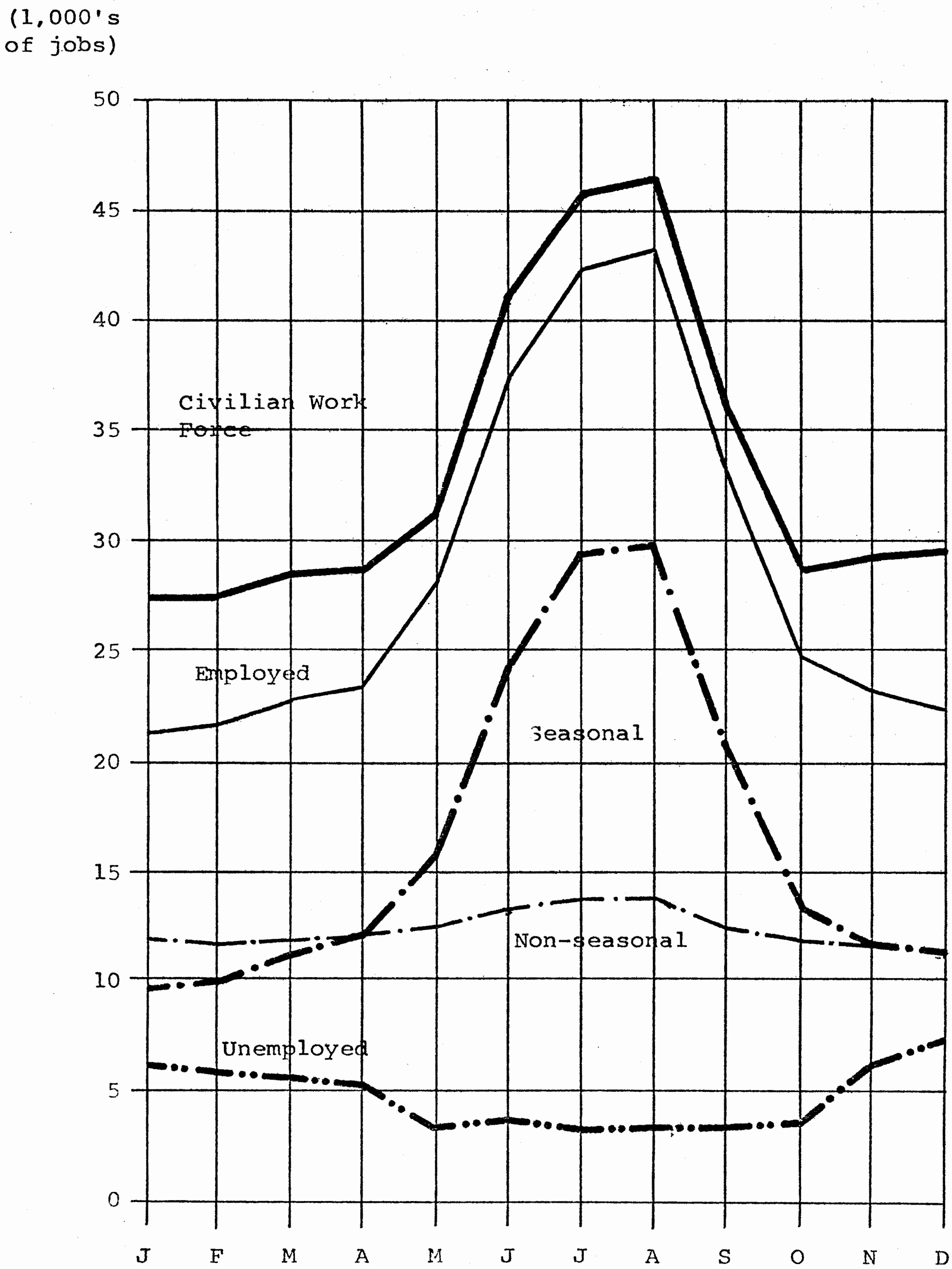
Data Source: New Jersey Department of Labor & Industry

Number of Resident Jobs by Class in 1970 Plate III



Data Source: New Jersey Department of Labor & Industry

Number of Resident Jobs by Class in 1974 Plate IV



Data Source: New Jersey Department of Labor & Industry

to 24.8% in December. But, whereas the unemployment rate increases four-fold, the number of unemployed only increases two-fold. Another important fact to notice is that while the number of jobs increase by 20,000 during the summer, the number of unemployed drops by only about 3,000. Thus during the peak of major employment opportunity, there are still 3,100 unemployed in the County. Obviously these persons are not without jobs due to a lack of employment opportunities provided by the resort economy. Their unemployment is due to factors other than lack of job opportunities. Thus, when discussion the resort economy, maybe we should be saying that as a result of the seasonality of the industry there are 4,200 unemployed in December (7,300 minus 3,100) for an unemployment rate of 14.2% and not 24.8%.

A further consideration must be given to the fact that some percentage of the winter unemployment is voluntary. A portion of this group are mothers with children in school who work summers and prefer to collect earned unemployment benefits during the winter. Also unemployment laws permit business owners to incorporate their businesses and lay themselves off at the end of the season and still be eligible for unemployment benefits. Finally, many people are able to earn a decent annual wage during the summer season so that winter unemployment is not an actual financial hardship. As a result, the actual unemployment due to the resort industry may be substantially below the 14.2% calculated above. All this is not to say that there are not individuals in the County who suffer financial hardship due to unemployment. The important fact is that the resort industry provides a good solid economic base for the County. Too often this industry is blamed for a "critical" seasonal unemployment problem which <u>may</u> not even exist. This "problem" is also considered by some as a reason for expanding the traditional type of manufacturing base of the County.

However, care should be taken regarding moves in this direction. During the summer of 1974, while the nation and State were suffering through a severe recession, the County tourist industry had one of its best seasons ever. As the 1975 season approaches, and the nation and State are still in a severe recession, real estate agents and motels are reporting a very high percentage of advance bookings. During this same period, the County has seen the closing of the biggest manufacturing plant in the County and some cutbacks in other manufacturing plants. The lesson in this could be that expansion of the economic base through manufacturing may increase the problem it is trying to solve. Major efforts in the direction of the long called for extended tourist season may be a more beneficial course of action for the unemployed of the County.

To determine whether the resort industry is a good economic base for the County, it is not enough to look at the County and its economic base by itself. For the purpose of comparison, the State of New Jersey and the other seashore Counties of Atlantic, Ocean and Monmouth were selected.

These Counties either have or have had an economy heavily dependent on the tourist trade. Table VI and Plate V show data on the dwelling units in these Counties regarding their status as either permanent year-round or seasonal. This can be used as a measure of how much the respective Counties have shifted away from a resort economy base. Subsequent data will show resultant changes which occured along with this shifting and what this shift has cost the residents of the respective Counties. This analysis also provides a good indication of what could happen to Cape May County.

TABLE VI

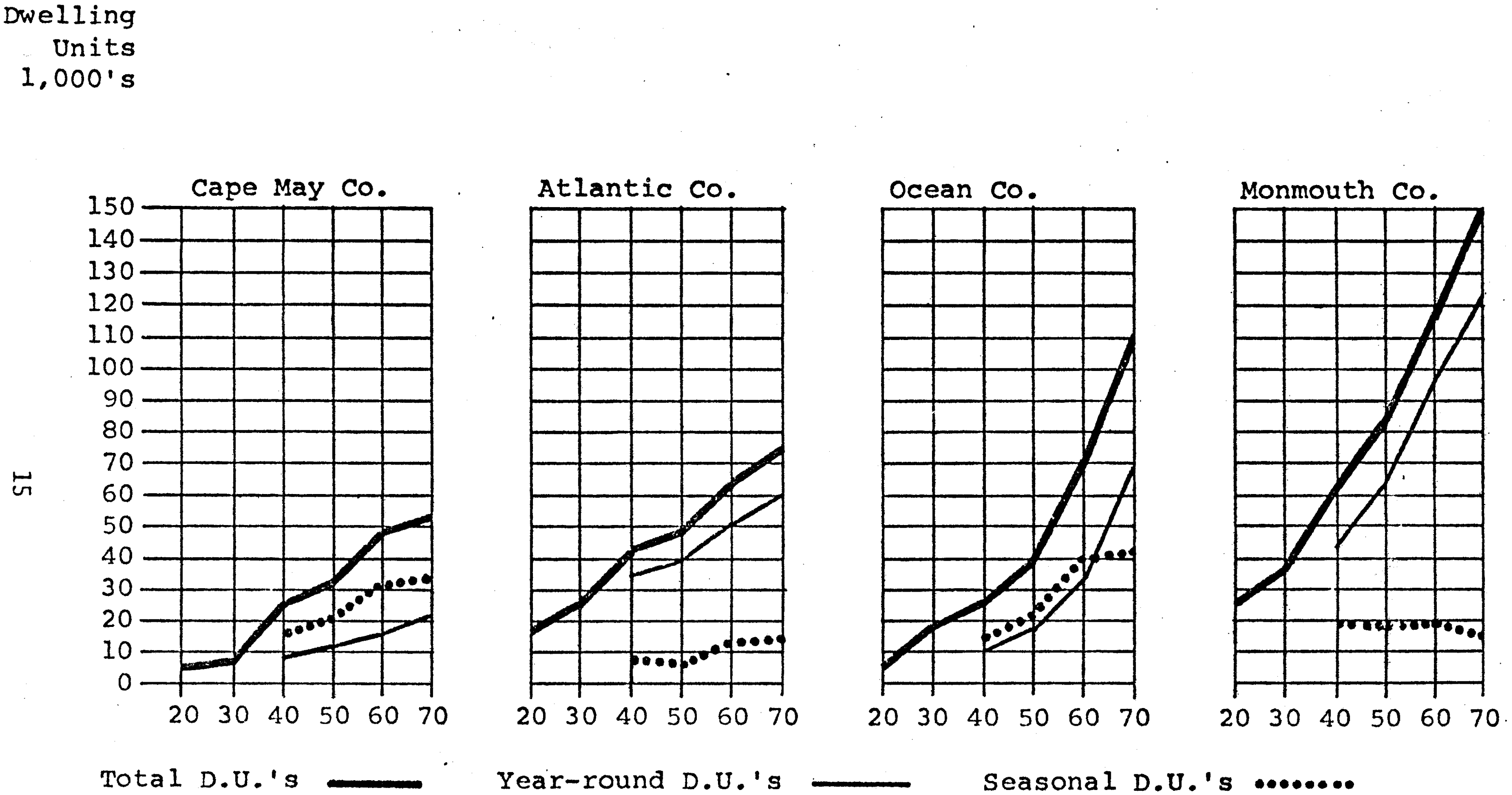
DWELLING UNIT STATUS

	1920	1930	1940	1950	1960	1970
Cape May County						
Total D.U.'s	5,039	7,832	25,065	32,233	47,377	53,152
Permanent			8,632	11,635	15,945	21,177
Seasonal			16,433	20,515	31,432	31,975
Atlantic County						
Total D.U.'s	17,711	26,298	43,223	48,604	64,601	73,848
Permanent			34,640	40,168	52,193	60,716
Seasonal			8,583	7,313	12,408	13,132
Ocean County						
Total D.U.'s	5,535	8,907	24,376	38,485	71,657	110,311
Permanent			10,921	17,680	33,207	68,362
Seasonal			13,455	20,692	38,450	41,949
Monmouth County						
Total D.U.'s	25,250	36,908	63,544	82,668	115,619	149,920
Permanent			43,746	63,898	96,168	135,230
Seasonal			19,808	18,441	19,451	14,690

Source: U.S. Bureau of the Census

Dwelling Unit Status for the Four Seashore Counties (1940 - 1970, seasonal vs. year-round)*

Plate V



* Breakdown of seasonal/year-round dwelling units for 1920 and 1930 are not available

Source: U.S. Bureau of the Census

Table VII is a measure of the retail sales dollar importing strength of the four County economies. What the numbers show is the cash amount of retail sales for every dollar of buying power. For instance, in Cape May County in 1973, for every resident dollar of buying power in the County, there was $.95 in retail sales. As of 1973, Cape May County had the highest figure for the four Counties. This means that Cape May County has the strongest retail sales economy of the four Counties and the State. To put this into better prespective, it is necessary to compare these figures to some sort of standard.

Although there is no "standard" ratio of retail sales dollars to buying power dollars, it is logical to use the State figure as a standard for the Counties in question. With $.95 of retail sales for every dollar of buying power, $.51 can be assumed to be from permanent residents so that $.44 must come from tourist spending (the resort economy). These figures indicate that Cape May County has a strong retail sales dollar importing economy. When the data from Table VII is ploted (see Plate VI) and compared with Plate V, it shows that as other Counties shifted from more seasonal to less seasonal residential development, the retail sales dollar importing power of the economy has dropped. Over this same period of time, Cape May County has stayed about the same. In terms of retail sales, the resort industry has given the County a strong dollar importing economy compared to the other Counties and the State as a whole. Thus, in addition to stimulating summer homes, motels, and campgrounds, all of which provide tax revenue and have a relatively low demand for public services, the resort economy supports a strong retail sales economy which also provided tax revenues while requiring relatively little in the way of public services.

Table VIII measures the degree of indebtedness of the four Counties and the State. Cape May County is significantly below the State figure.

TABLE VII

AMOUNT OF RETAIL SALES PER DOLLAR OF BUYING POWER

Dates	New Jersey	Cape May	Atlantic	Ocean	Monmouth
1948	$ .64	$1.04	$ .79	$ .95	$ .74
1949	.60	.97	.74	.89	.69
1950	.65	1.00	.88	.98	.73
1951	.62	.92	.83	.89	.67
1952	.62	1.25	1.09	1.28	.80
1953	.65	1.15	1.05	1.26	.74
1954	.59	1.15	1.03	1.19	.71
1955	.60	1.32	.95	1.34	.68
1956	.57	1.26	.94	1.31	.64
1957	.59	1.24	.94	1.23	.64
1958	.59	1.18	.84	1.24	.60
1959	.58	1.07	.86	1.20	.67
1960	.55	1.06	.79	.96	.57
1961	.54	.93	.79	.89	.57
1962	.56	.94	.80	1.04	.60
1963	.56	.94	.72	1.15	.60
1964	.57	.95	.87	.87	.61
1965	.57	.95	.86	.82	.61
1966	.55	1.04	.85	.76	.56
1967	.56	.98	.74	.72	.52
1968	.51	.95	.77	.76	.53
1969	.50	1.01	.85	.83	.56
1970	.46	.98	.78	.68	.52
1971	.45	1.01	.76	.71	.57
1972	.51	1.00	.80	.78	.60
1973	.51	.95	.78	.76	.62

Data Source : New Jersey State Department of Labor & Industry

Dollars
Amount of Retail Sales per Dollar of Buying Power
Plate VI
1.4
1.3
1.2
1.1
1.0
.9
.8
.7
.6
.5
.4
Cape May County
Ocean County
Atlantic County
Monmouth County
New Jersey
Data Source: New Jersey Department of Labor & Industry
50
55
60
65
70
73
75

TABLE VIII

AVERAGE GROSS CAPITAL DEBT PER DOLLAR OF ASSESSED VALUATION*, 1973

	Cape May County	Atlantic County	Ocean County	Monmouth County	New Jersey
1973	$.0376	$.0571	$.0343	$.0671	$.0529
1970	$.0481	$.0458	$.0398	$.0694	$.0571

* Net Valuation On Which County Taxes Are Apportioned

Data Source: New Jersey Department of Community Affairs, Division of Local Government Services - Annual Reports, Statements of Financial Condition of Counties and Municipalities

Of the other three Counties, only Ocean County is lower than Cape May County. (However, from 1970 to 1973 Cape May County showed a drop of 1.05 cents while Ocean County had a drop of only .55 cents). As a result Cape May County residents are paying less money for interest on outstanding debts and have a greater reserve borrowing power.

Table IX shows the computed average tax rate for the four Counties and the State. In both 1970 and 1973, Cape May County's average tax rate was below the State average and that of the other three Counties. In other words, the average Cape May County resident pays less real estate tax than his counterpart in the other Counties and the State.

Table X shows the average tax per dwelling unit in 1970 and 1973 for the four Counties and New Jersey. Again, Cape May County is lower in both years than all the other three Counties and the State.

The last table, Table XI shows the average governmental expenditure per dwelling unit for the four Counties and the State for the years 1960, 1970 and 1973. As the table shows, Cape May County had the lowest expenditures in all three years.

What all this data on the four Counties and the State show is that it is costing residents of Cape May County less to live here than it does elsewhere in the Counties studied. Also Cape May County has a stronger retail sales economy. And all this is directly a result of the resort economy. This is because there are many homes and businesses in this County which pay taxes to the local municipalities but because they are seasonal, do not create a high demand for services on a year round basis. In effect, the non-resident land owning taxpayers are subsidizing the permanent residents of the County. As a result, not only does it cost less to live in the County, but it costs less for a lify style which most residents will agree is the finest in New Jersey.

TABLE IX

AVERAGE TAX RATE FOR FOUR COUNTIES AND NEW JERSEY

1970	Assessed Valuation	R.E. Taxes	Taxes Per $100 of Assessed Valuation
Cape May County	$ 855,776,392	$ 25,487,564	$2.98
Atlantic County	$ 1,172,561,021	$ 50,226,398	$4.28
Ocean County	$ 1,938,665,870	$ 66,753,669	$3.44
Monmouth County	$ 3,307,181,862	$ 134,060,790	$4.05
New Jersey	$55,396,485,323	$2,084,337,330	$3.76
1973			
Cape May County	$ 1,309,416,109	$ 38,408,878	$2.93
Atlantic County	$ 1,554,615,265	$ 64,968,004	$4.18
Ocean County	$ 3,296,215,044	$ 101,864,108	$3.09
Monmouth County	$ 4,649,289,685	$ 186,787,840	$4.02
New Jersey	$74,752,721,637	$2,770,559,217	$3.71

Data Source: New Jersey Department of Community Affairs, Division of Local Government Services - Annual Reports, Statements of Financial Condition of Counties and Municipalities

TABLE X

AVERAGE TAXES PER DWELLING UNIT

	1970	1973
Cape May County	$322.59	$432.70
Atlantic County	$336.66	$450.19
Ocean County	$452.81	$533.74
Monmouth County	$616.69	$802.79
New Jersey	NA	$705.75

Data Sources: U.S. Bureau of the Census, New Jersey Department of Community Affairs, Division of Local Government Services - Annual Reports, Statements of Financial Condition of Counties and Municipalities.

TABLE XI

AVERAGE GOVERNMENTAL EXPENDITURES PER DWELLING UNIT*

	1960	1970	1973
Cape May County	$562.17	$1506	$1770.86
Atlantic County	$1,039.31	$1764	$2392.16
Ocean County	$730.60	$1540	$1849.53
Monmouth County	$1,170.21	$2786	$3531.57
New Jersey	$1,242.12	$2670	$3272.49

Data Source: New Jersey Department of Community Affairs, Division of Local Government Services - *Annual Reports, Statements of Financial Condition of Counties and Municipalities*

* Includes municipal and County expenditures, gross capital debt authorized, capital expenditures, municipal utilities' expenditures, and special district taxes levied.

Conclusions & Recommendations

The data in this report clearly shows the strong relationship between the resort economy and land use. In fact, the data shows that the resort uses dominate the County land use pattern. From the foregoing information, it can be easily said that the resort industry provides the County with a very strong and thriving economic base, which directly and indirectly benefits Cape May County residents.

To Summarize:

1. As a sign of the economic strength, the assessed valuation of the County has been growing at an increasing rate every year and in the year 1974-75 had the highest percent increase in assessed valuation of all the Counties in the State - 23.3%.

2. As of 1973, the resort economy directly accounted for $19.9 million in real estate taxes and indirectly for another $9.4 million - a total of $29.3 million dollars.

3. Tourist-generated retail sales were $122.2 million in 1973. When combined with figures for rental income, the tourist spinding is $242 million. When miscellaneous spending is included, tourist spending represents about $250 to $300 million dollars annually.

4. During the summers of 1974 and 1975, a time of severe national recession, the resort industry had two of its best seasons.

5. Cape May County has one of the lowest rates of gross capital debt in the State.

6. Cape May County residents pay less real estate tax than their counterparts in the other three shore Counties, and less than the State average.

7. The average tax per dwelling unit is lower in Cape May County than in the other 3 Counties and is less than the State average.

8. Average governmental expenditures per dwelling unit were lower in

Cape May County than in the other 3 Counties and lower than the State average.

Compared to similar Counties, it costs County residents less to enjoy one of the best life styles in the State as a direct result of having a resort economy.

To maintain and perpetuate the present way of life in the County some very important facts should be kept in mind.

The resort economy needs the right environment to prosper and grow. This means a balanced land use pattern of farmland, woodland, wetlands, open beach areas and development. Especially important is that development be as much as possible in harmony with the "open atmosphere" of the rural mainland or in keeping with the island resort character to best preserve the County's resort environment.

To achieve this, the following goals should be adopted as part of the County Comprehensive Plan and by local communities as part of their Comprehensive Plans and Zoning Ordinances.

a. Preserving the wetlands of the County.

b. Preserving and promoting the agricultural industry of the County.

c. Preserving the rural character of the mainland through appropriate zoning and planning, including lower densities in the hinterland and clustering development where higher densities are suitable.

d. Preserving the "open air" quality of the island communities through controlled development with high-rise construction limited to areas specifically suited for this type of development. In addition to proper location, high rise structures can only be compatible with the seashore environment if they are properly designed and sighted with ample allowances for open space parking and other facilities and amenities. Proper zoning and site plan ordinances are essential in this regard.

To maintain and increase the benefits from the resort economy, the permanent population of the County should be limited and municipal and County development plans should emphasize facilities to accommodate and expand tourist population. For the island communities, this means a greater emphasis on transient facilities such as hotels and motels, and less on single family and two family homes. For the mainland it means some increase in motel and hotel facilities, continue expansion of campground facilities, and encourage development of self-contained hotel recreation facilities such as those in the Poconos and the Catskills. In addition, attempts should be made to attract recreational facilities such as museums, amusement parks, safari parks, etc., thus complimenting the water-oriented facilities on the island communities as well as providing recreational alternatives for the County tourist population.