



# New York City Tourism: A Model for Success

**NYC**<sup>TM</sup>  
& Company



## **Introduction to New York City Tourism: A Model for Success**

---

As New York City readies to welcome a new administration in 2014, NYC & Company has prepared this report to tell the story of the tourism industry's unprecedented growth over the last seven years and impress upon our current and future elected officials the importance of supporting and maintaining the substantial progress that has been made.

While tourism has always been an important industry for New York City, over the recent years it has dramatically grown into a cornerstone of our economy—generating a record \$55.3 billion in economic impact, welcoming an all-time high of 52 million visitors and employing more than 363,000 New Yorkers across all five boroughs. Of course, this record-breaking success did not come about by chance, but was the result of the hard work of NYC & Company's nearly 2,000 members and the implementation of a revolutionary tourism model beginning in 2006.

Recognizing the need to modernize New York City's approach to municipal marketing, the private tourism sector worked with the City to expand the scope of NYC & Company services—absorbing the responsibilities of NYC Marketing and NYC Big Events. The result was the creation of a single full-service, public private entity tasked with promoting all five boroughs to domestic and international travel markets. Under the leadership of CEO George Fertitta, NYC & Company became the standard-bearer for the industry, with a global communications network, an in-house creative services team, new digital and editorial content, along with marketing- and tourism-development teams responsible for generating private funds through industry and corporate partnerships.

In addition to offering insight into the organization's structure and strategies for success, this report will provide vital information on key sectors with input from stakeholders across the industry. As candidates and civic leaders outline their future visions and priorities for the City, maintaining the growth of the tourism industry should be a strong part of any economic development and job creation platform. Tourism's return on investment can be substantial, but we can reach our goals only if the public sector joins the hundreds of thousands who work so hard every day to make New York City the number-one city destination in the country.

Sincerely,  
NYC & Company Leadership Team and Members

## **Contents**

---

<b>A Letter from the Chairman</b>	<b>2</b>
<b>A Letter from the CEO</b>	<b>3</b>
<b>Executive Summary</b>	<b>5</b>
Incomparable Success	6
NYC & Company Members	8
<b>The Impact of Tourism</b>	<b>11</b>
Steady Job Growth	13
Substantial Economic Impact	14
Supporting Tourism	16
Unprecedented Hotel Growth	17
The Power of Culture	19
Conventions, Meetings and Trade Shows	20
<b>Strategies for Success</b>	<b>23</b>
The International Visitor	25
Worldwide Success	26
Targeting Emerging Markets	27
Reaching New Audiences	28
<b>NYC &amp; Company Programs and Initiatives</b>	<b>31</b>
<b>Keeping the Momentum Going</b>	<b>45</b>
A Future Bright with Potential	47
In the National Stage	49
Protecting the City's Interests	49
Champions for Reform and Investment	49
<b>Our Industry</b>	<b>53</b>
NYC & Company Committee Letters	54



## A Letter from the Chairman



Across nearly every sector, across all five boroughs, New York City tourism has been able to attract more visitors, generate more revenue and create more jobs than ever before. It was tourism—and the 363,000 New Yorkers working in the industry—that spurred critical economic growth and helped maintain the energy and vibrancy of the City when it was needed most.

Indeed, the vision to create the most forward-thinking and dynamic municipal marketing organization has been realized. Since 2006 the reenvisioned NYC & Company has created and implemented a multifaceted global development program based around a five-borough promotional approach, unique public-private partnerships and new audience-engagement strategies. From our network of global offices to our city-to-city tourism agreements to our forays into new media, the NYC & Company model has become one emulated by other destinations across the world.

Yet, in the spirit of our great city, NYC & Company continues to look forward—there is much work still to be done and much more to accomplish. In 2012 we announced a new goal of 55 million visitors and \$70 billion in economic impact by 2015—and after another record-setting year we remain on track to reach it.

Several key initiatives will help us reach these goals, including the Neighborhood x Neighborhood communications and marketing campaign designed to highlight nontraditional tourism neighborhoods; the NYC Culture Collection, a web promotion to drive visitors to the City's cultural institutions; and the successful recruitment of high-profile events such as the Major League Baseball All-Star Game, Formula 1 racing and, of course, Super Bowl XLVIII. Additionally, we are pleased to announce our latest Official NYC Family Ambassador program, "Where's Waldo In NYC?" It features promotional activities to encourage residents and visitors to explore and find unique city destinations.

NYC & Company will continue to build upon the inroads made in critical foreign markets and with specific demographics, such as the LGBT community, youth and student travel, and meetings and business markets. We are even taking the preliminary steps to turn the award-winning nycgo.com into one of the industry's most efficient, transactional, one-stop tourism sites on the market.

As we are all aware, 2013 is a key transitional year for New York City. Our next mayor will be given many challenges but also an opportunity to foster and enhance the spirit, allure and draw of the five boroughs. This is an opportunity, or more so a duty, that we share. As NYC & Company and its nearly 2,000 members push onward to 2015 and beyond, it is our sincere hope that the next administration will embrace our mission, our success and our ambition. As this packet will highlight, a strong NYC & Company and a growing tourism industry is essential to our city's continued well-being.

Sincerely,

Emily K. Rafferty  
Chairman, NYC & Company

## A Letter from the CEO



Over the past seven years, I have had the privilege and honor to lead NYC & Company during a period of remarkable growth and prosperity for New York City's tourism industry. Of course, this success was not pure happenstance. In order to meet our ambitious goal of 55 million annual visitors by 2015, we immediately set out to showcase the City's wide range of products to new audiences in entirely new ways.

First, we expanded our international presence by opening representative offices in 18 countries across the globe, particularly in emerging markets such as Brazil, India, Australia and China. These early efforts to diversify and enlarge our consumer base not only helped us reach 50 million visitors a full four years ahead of schedule but also helped offset the slight decline in travel from traditional European markets slowed by the global recession.

Second, we implemented a five-borough promotional strategy aimed at the intrepid international traveler, repeat visitors and local audiences. In doing so, we reimagined our marketing campaigns to go beyond traditional tourism areas, infused our redesigned tourism website with thousands of pages of original borough and neighborhood content and mobilized our press teams on the ground and abroad to hammer home the message that we are truly five cities in one.

Additionally, we pushed forward into the brave new digital world. Today visitors can create and email itineraries from our Official NYC Information Center directly to their mobile phones. Tour operators can download tool kits and promotional materials on hotels, neighborhoods and transportation options to help them plan group trips to the City. Both consumers and press can interact directly with NYC & Company through Facebook and Twitter accounts, often in their market and their language. Finally, visitors can book hotels and do customized event searches for their travel dates on nycgo.com, the Webby Award winner for best tourism site.

Looking ahead, we are developing exciting initiatives to promote some of the fastest growing areas of the City, particularly where there has been strong hotel development like Long Island City and Downtown Brooklyn. And our team has identified new target markets in South America and Asia, where we see stability and a growing middle class.

As we prepare to reach our 2015 goals, we will explore new and innovative ways to promote the five boroughs and reach new audiences. Our industry, with a citywide workforce of 363,000 and growing, will be looking for continued support as they strive to welcome more visitors and provide them with a one-of-a-kind experience that will stay with them forever.

Sincerely,

George Fertitta  
CEO, NYC & Company





# Executive Summary

**Incomparable Success**

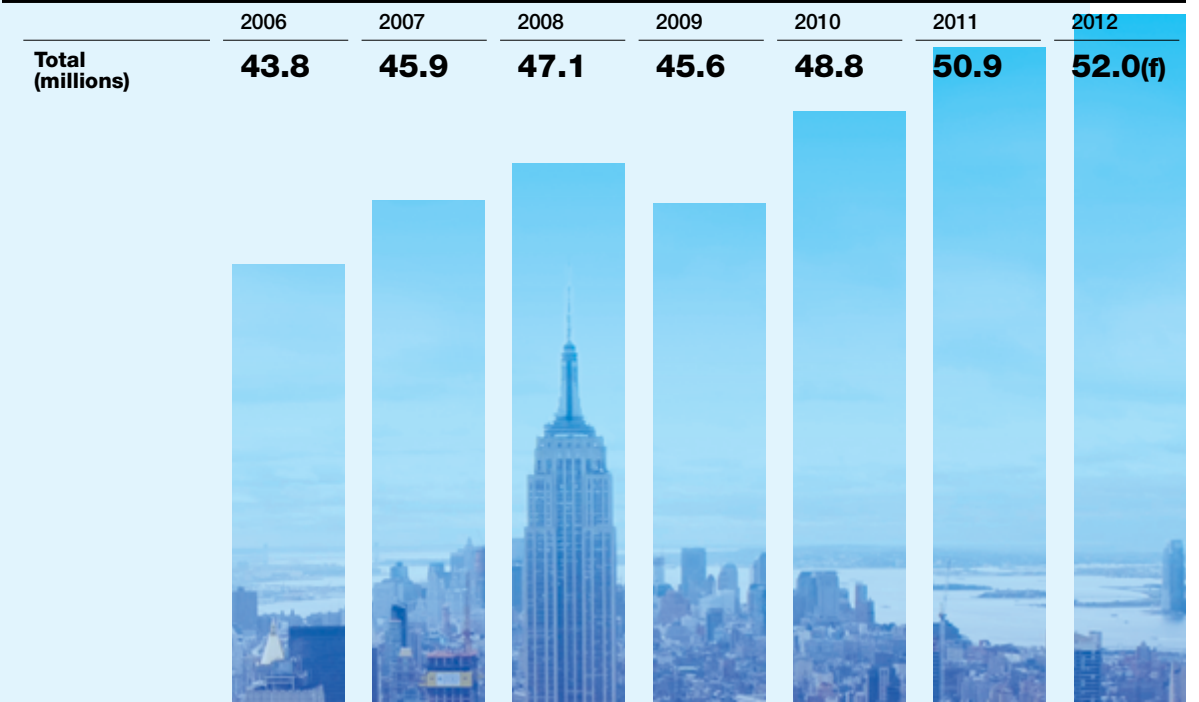
# New York City's tourism industry is thriving at a level never seen before.

New York City is the country's top port of entry, top overseas market, top generator in tourism spending and the top big city destination. Indeed, we are seeing record numbers of visitors on an annual basis, all spending more and exploring more. The industry has become a critical revenue generator and job creator—growing into New York City's fifth-largest industry by jobs. Furthermore, tourism was a driving force in stabilizing the City's economy during the economic downturn.

Much of this success stems from the creation in 2006 of a private-public municipal marketing model that reinvigorated the City's approach to tourism development. Under new leadership and structure, NYC & Company put in place an aggressive international expansion plan and five-borough promotional strategy. The successful implementation allowed the new organization to diversify and grow its pool of visitors through a tailored approach that reached an array of different audiences and interests from around the globe.

As a result, New York City tourism is seeing unprecedented growth. Overall visitation has increased by nearly 19% since 2006, including a 12% increase in domestic visitors and a 52% increase in international visitation. And with 52 million visitors, 2012 was yet another banner year—breaking visitation records for the third consecutive year and the fifth time in six years.

**NYC VISITATION (2006–2012)**



**NYC INTERNATIONAL VISITATION (2006–2012)**



Source: NYC & Company/OTTI

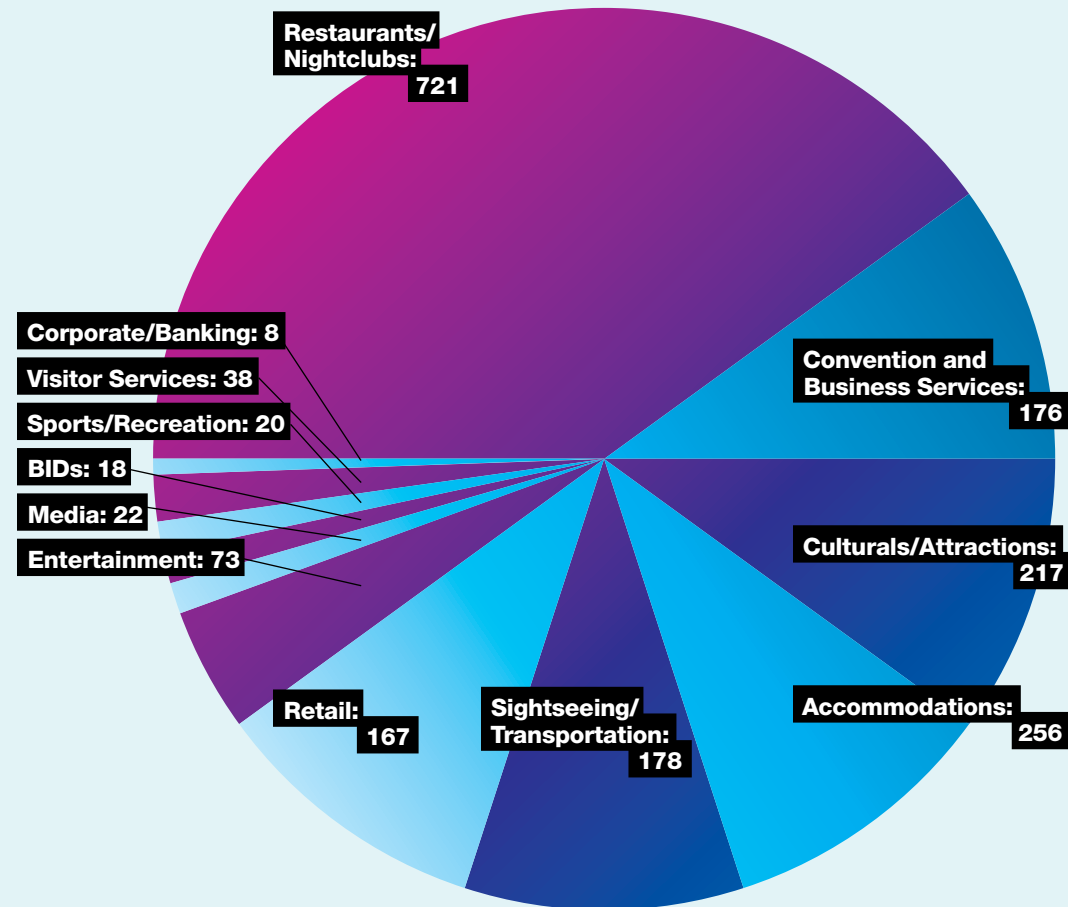


### NYC & Company Members

NYC & Company's membership is a microcosm of the City itself, a diverse group of businesses large and small. Nearly 2,000 members from all five boroughs come together with the common goal to strengthen their own marketing strategies and initiatives by working with NYC & Company, maximizing the reach of our marketing programs and amplifying the positive messaging about New York City.

NYC & Company's membership spans the convention, tourism and hospitality industries. Dues-paying members include major corporations and nonprofit organizations. NYC & Company is proud to represent and work on behalf of so many of New York City's finest businesses, including many of the City's newest hotels, restaurants, retailers and visitor attractions.

#### NYC & COMPANY'S MEMBERSHIP COMPOSITION







# The Impact of Tourism

**As New York City's fastest-growing industry, tourism has been a stabilizing force for the City during the economic downturn. Our visitors are not only part of the backbone of our City's economy, they also add to the excitement, energy and diversity of NYC.**

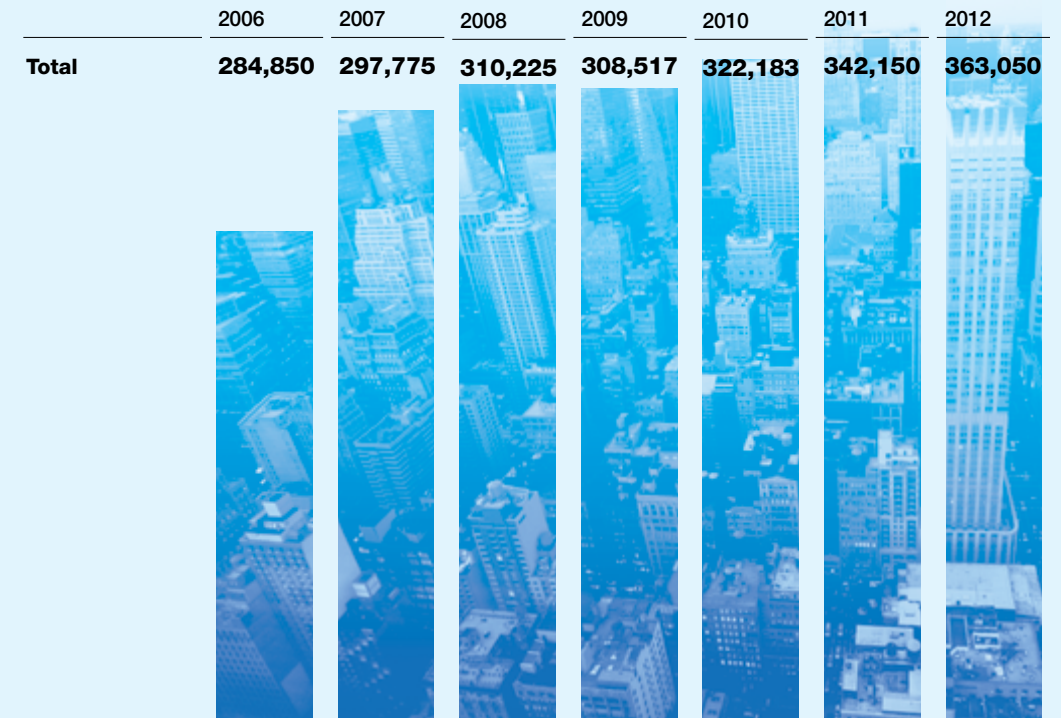
**Steady Job Growth**

Tourism continues to fuel job growth across almost all sectors, particularly in the areas of accommodations, arts and food services. In 2012 tourism supported a record 363,050 hospitality and leisure jobs—a 27% increase since 2006. Indeed, over these past seven years, tourism jobs have been growing at a faster rate than any other major industry in the City. And tourism has been one of only three industries to see a double-digit percent increase during this period.

**FASTEST GROWING INDUSTRY (2006-2012)**

- Leisure and Hospitality +27.4%**
- Education and Health Services +13.0%**
- Other Services +10.3%**
- Professional and Business Services +8.4%**
- Information +7.1%**
- Trade, Transportation and Utilities +5.1%**
- Financial Activities -4.3%**
- Goods Producing -14.8%**

**78,200 LEISURE AND HOSPITALITY JOBS ADDED SINCE 2006**



Source: NYS Dept of Labor



Substantial Economic Impact

# Since 2006 NYC & Company has grown the City's market share of inbound overseas travel to the United States from 28% to 33%.

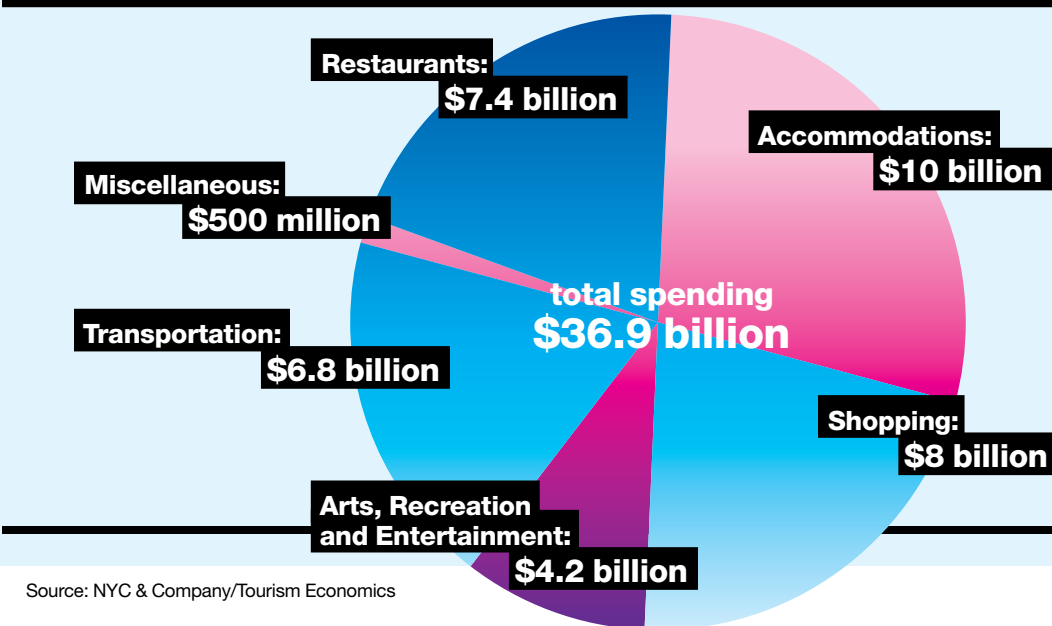
Each share point increase has generated an additional \$750 million in direct spending and more than \$1 billion in economic impact annually. In total, over the last seven years, the economic impact of tourism has grown 42% to an all-time high of \$55.3 billion in 2012. Additionally, visitors to the City currently spend \$36.9 billion annually—also up 41%—across an array of restaurants, hotels, retail stores, museums, theaters and cultural institutions and much more.

VISITOR SPENDING (2006–2012)

Direct visitor spending has seen a 41% increase since 2006, which means an additional \$10.7 billion is going directly into our neighborhoods and local businesses.



BREAKDOWN OF 2012 VISITOR SPENDING



Source: NYC & Company/Tourism Economics



## Supporting Tourism

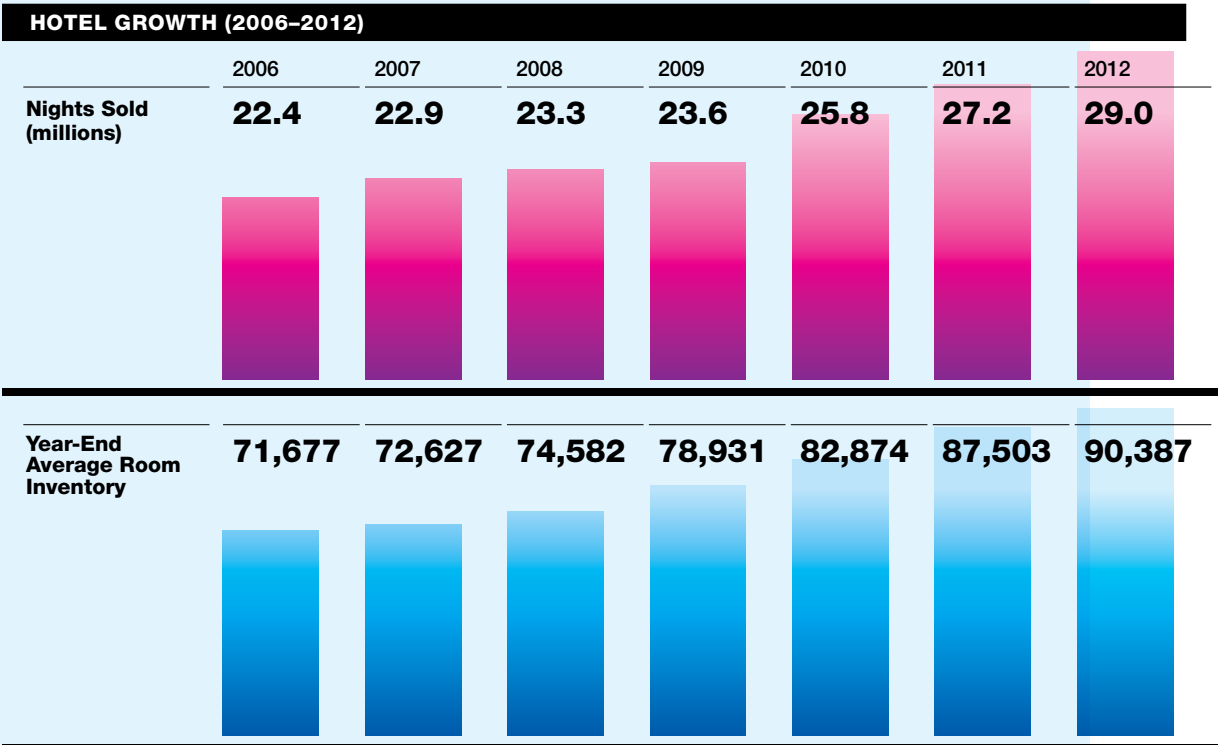
**New York City tourism continues to be one of the strongest and most stable tax bases that benefit not just the City but all of New York State. In 2012 visitor spending generated \$9.3 billion in taxes, including \$3.3 billion in city taxes. When compared to the \$13.8 million city budgetary line item for tourism, these city tax receipts represent an approximate 24,000% return on investment. In fact, travel and tourism lowered the tax bill of each New York City household by an average of \$1,500 in state and local taxes.**

With an aggressive new goal of 55 million visitors and \$70 billion in economic impact by 2015, the tourism industry will be relying on even more investment and support from the next administration. The restructuring of NYC & Company in 2006 not only created an organization that spurred exceptional growth, it was indicative of the new role and importance tourism plays in the economic and political landscape of the five boroughs.

## Unprecedented Hotel Growth

The strength of a destination's hotel sector is often one of the best barometers of a strong tourism industry. To this end, New York City's hotels are thriving and expanding at a rate never seen before. Over the past six years, the City has added 167 new hotels, increasing room inventory by 26% to a record 90,387. Yet this considerable growth corresponded with a 29% increase in room-nights sold, showing demand is keeping pace with development. Overall, the City's hotel industry generated billions in tax revenue and most importantly has seen an approximately 19% increase in jobs.

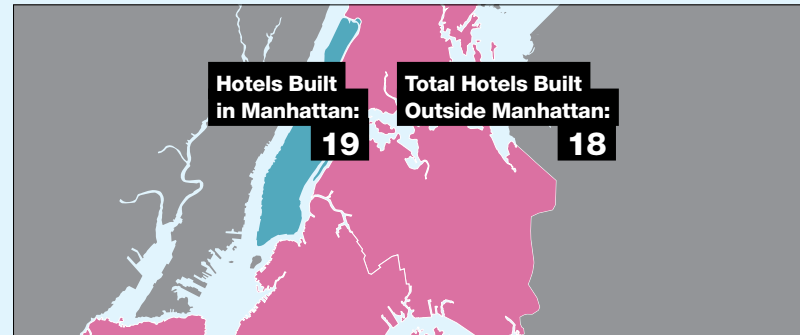
Furthermore, the hotel sector's expansion outside of traditional tourism areas has been a key corollary to the visitation success in boroughs beyond Manhattan. Queens and Brooklyn have added nine and five hotels, respectively, in the last two years alone, with 10 new hotels expected to come online in each borough in coming years. Additionally, Staten Island has had three hotels open since 2006, and the Bronx is expecting to add three hotels in the next three years. In fact, by the end of 2015, at least 87 new hotels will be operating outside Manhattan.



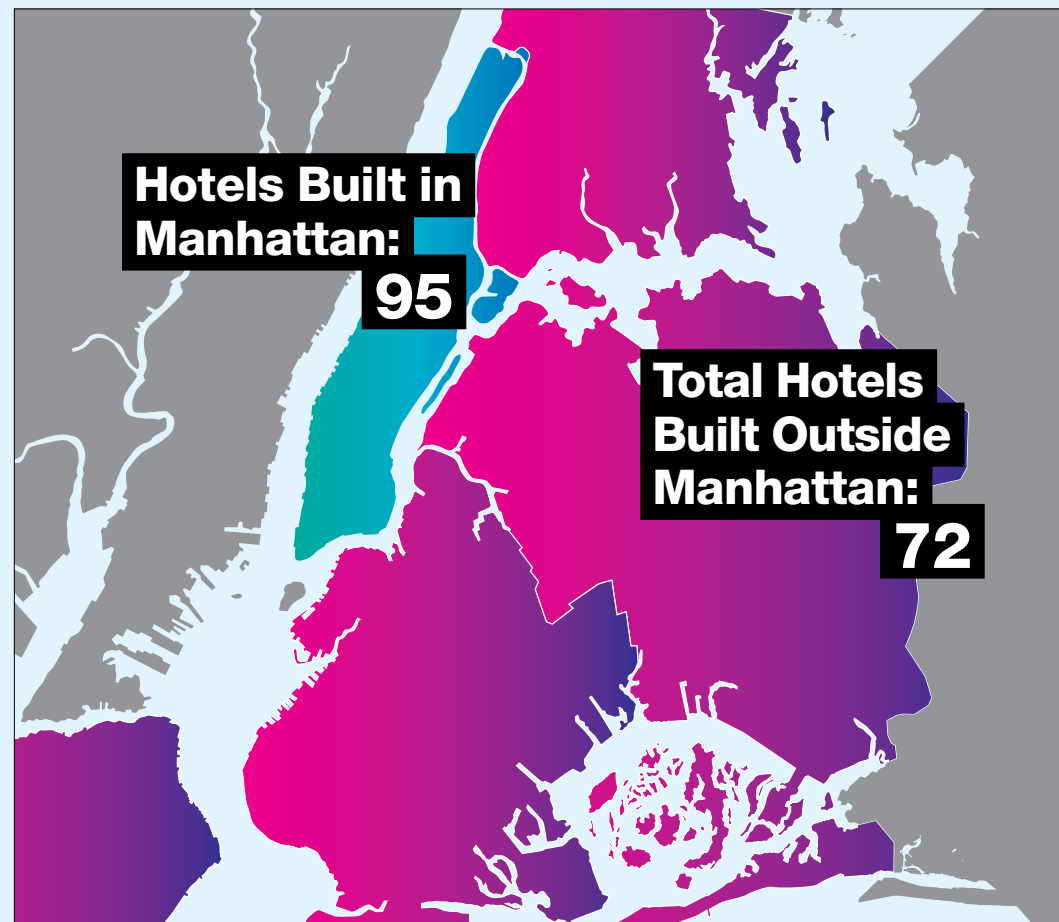
Source: NYC & Company

**Hotel Room Inventory: +26%**  
**Room-Nights Sold: +29%**  
**Average Daily Rate: +5.0%**

**NUMBER OF HOTELS BUILT (2002–2006)**



**NUMBER OF HOTELS BUILT (2006–2012)**



Source: NYC & Company

**The Power of Culture**

New York City's nonprofit cultural institutions have long been an integral part of the fabric and identity of the City—and an enormous draw to visitors, attracting almost half of all visitors to the five boroughs. The size, scope and diversity of our cultural offerings are also unique compared to other global cities. Very few destinations can offer so many distinct experiences across multiple genres and throughout all geographical areas of the City.

**Overall, cultural visitation has gone up 30% since 2006 to reach a record 24.5 million annual attendees.**

Of particular note is the allure of our cultural institutions to the international and repeats visitors. With over a third of these attendees coming from outside the United States, the City's cultural institutions have certainly been critical to NYC & Company's global expansion efforts and record-breaking growth in international travel. Indeed, these visitors are actually twice as likely as their domestic counterparts to include cultural activities in their itineraries. Similarly, 60% of cultural visitors are repeat visitors—illustrating not only the allure of these institutions but also the consumer interest in returning to see what they may have missed.

**NUMBER OF VISITORS TO CULTURALS (MILLIONS)**

2006	2007	2008	2009	2010	2011	2012
18.8	20.6	21.3	19.0	21.4	23.8	24.5(f)



Source: NYC & Company/OTTI/Longwoods Travel USA®



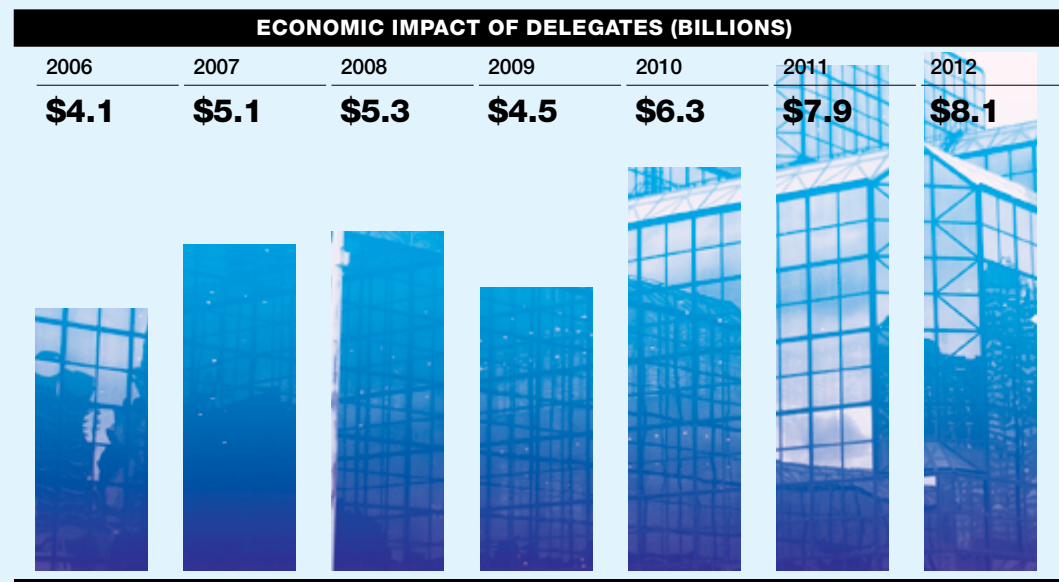
**Conventions, Meetings and Trade Shows**

One of the best and most efficient ways to generate visitation and fill hotel rooms is through the recruitment of conventions, meetings and trade shows. These events typically draw thousands of delegates and consumers to the City—visitors who stay in our hotels, dine at our restaurants, shop in our stores and explore our cultural institutions.

While the City has always been a top-of-mind destination for these kinds of events, NYC & Company found that procedural and recruitment inefficiencies were leading to lost business. To this end, the organization established off-site teams dedicated to pursuing opportunities in the Midwest and western regions of the country. Additionally, NYC & Company is exploring ways to aid NYC-based trade shows in expanding their international presence to help draw more people and make the City even more attractive for organizers.

As a result, the number of delegates to the City has increased 30%, economic impact has gone up 98% and direct spending has grown 95%.

**In 2012 the City had more conventioners than Las Vegas, despite having only 2.3 million square feet of convention space compared to its 10.6 million square feet.**



Source: NYC & Company







# Strategies for Success

**NYC & Company's international strategy and global expansion efforts have been vital elements to the recent industry growth. Since 2006 we have opened or enhanced representation in 10 countries around the globe. To date, the City now has dedicated teams on the ground in 18 countries, representing 25 world markets.**

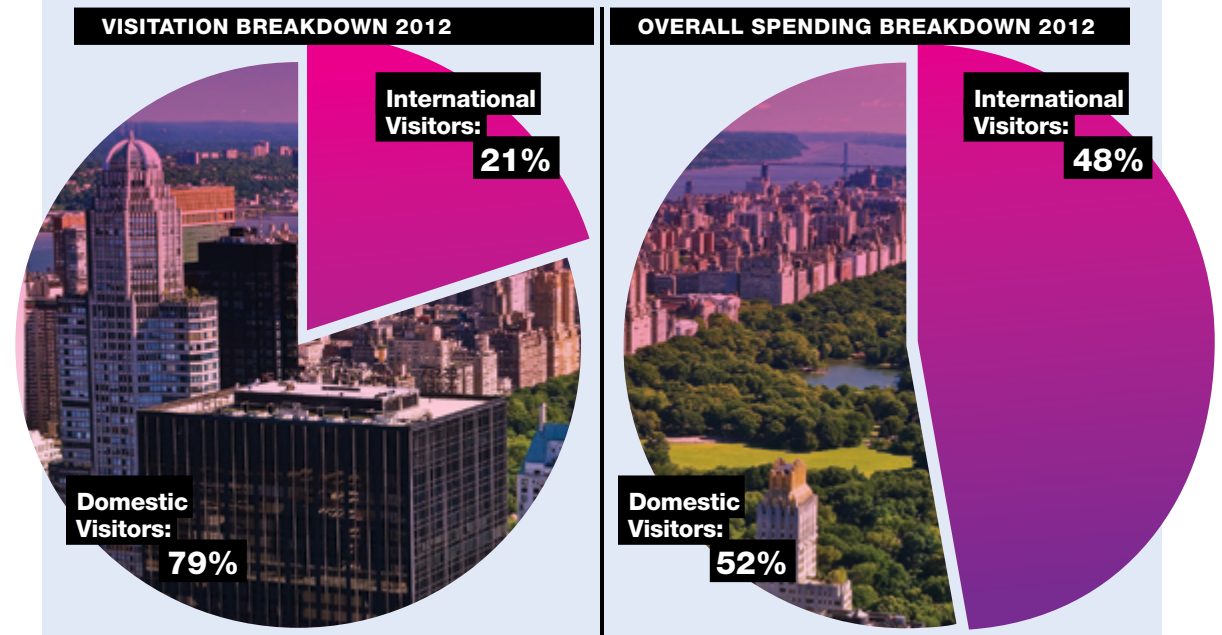
These offices have been critical to generating multiple business initiatives and breaking communication barriers. Now the organization can work directly with tour operators and travel agents in market to create tours and packages, press outreach can be tailored to the interests and profiles of each visitor and the City can respond almost instantaneously to sudden market changes and perception issues which may affect travel.

**The International Visitor**

New York City, as opposed to most other US destinations, is fortunate to have nearly 100% global brand recognition. Indeed, this brand awareness makes the five boroughs an aspirational destination for millions of people from around the world—they want to come explore the city they have heard and seen so much about in books, songs, film and television. Therefore, leveraging the City's iconic position to engage the international visitor in unique cost-effective ways became a critical mission for NYC & Company.

**Furthermore, the international visitor spends more, stays longer and is more intrepid than their domestic counterparts.**

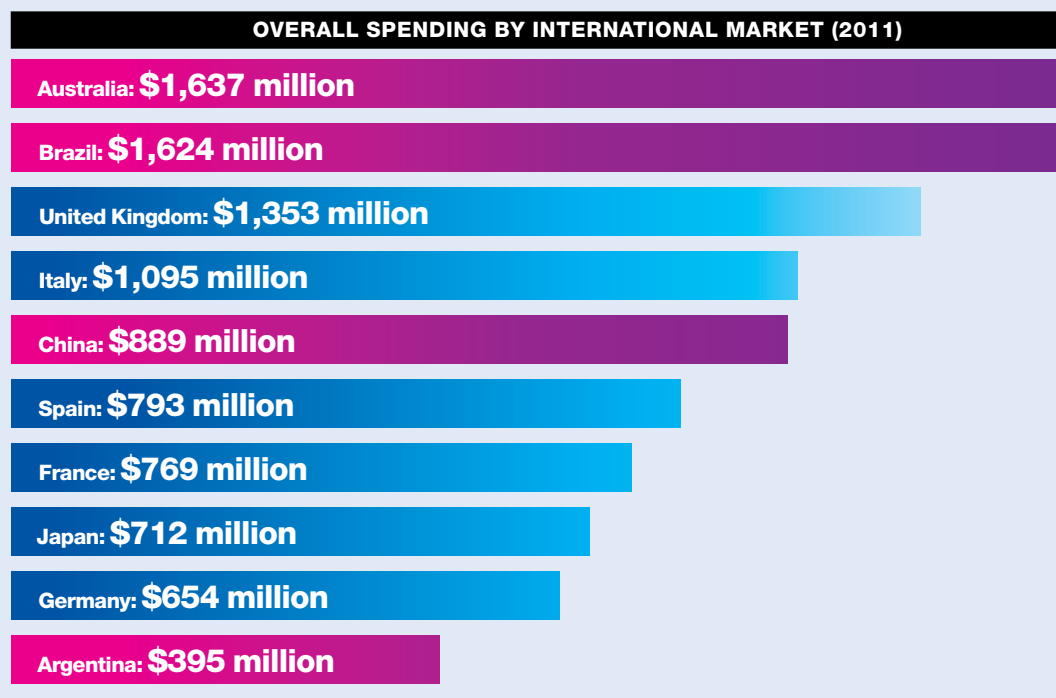
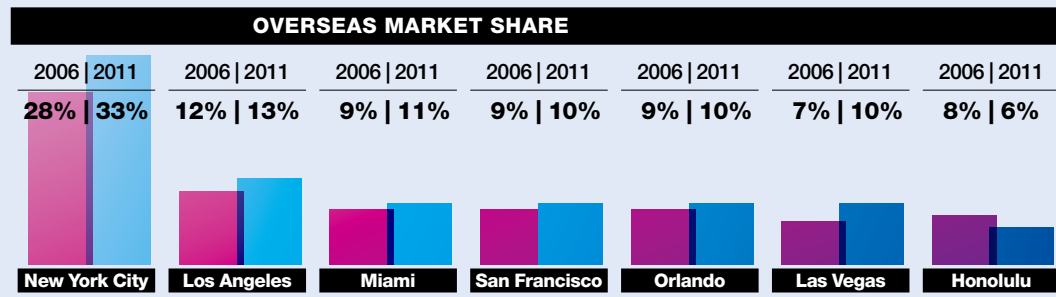
INTERNATIONAL VS. DOMESTIC VISITOR PROFILE		
	Overseas Visitors	Domestic Visitors
Length of Visit	<b>7.8 days</b>	<b>2.7 days</b>
Spending per Visit	<b>\$1,600</b>	<b>\$471</b>



Source: NYC & Company/OTTI/Longwoods Travel USA®

### Worldwide Success

New York City is currently the country's top international travel destination—welcoming more visitors and generating more spending than any other city. Additionally, over this period, nine of the City's top 10 visitor markets have grown between 27% to 447%, or an average of 138%.

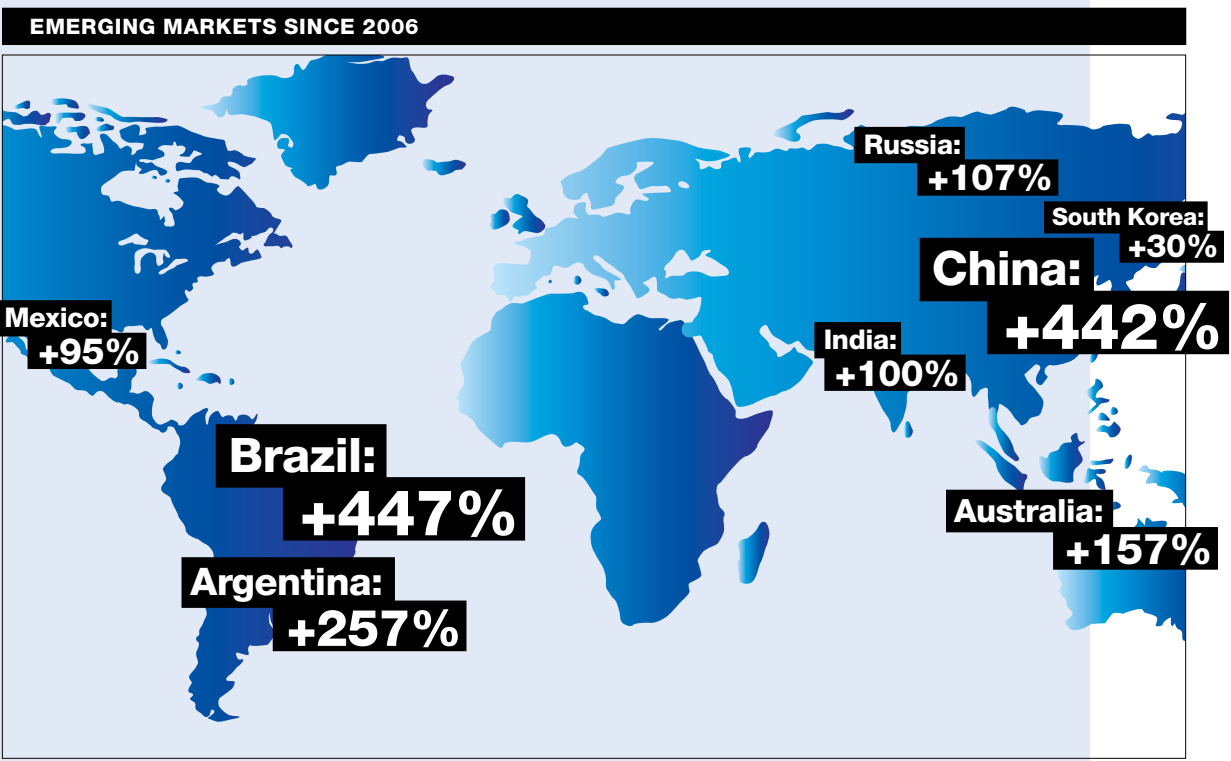


Source: NYC & Company/OTTI

### Targeting Emerging Markets

In capitalizing on the City's competitive advantage and recognizing the financial clout of the international visitor, NYC & Company saw an opportunity to grow market share and aggressively set in place a global expansion strategy.

One key area of expansion was the organization's investment in new and emerging travel markets, such as Brazil, India and China, among others. Not only were these markets relatively untapped with strong growth potential, but they were also strategically opened to help diversify the City's visitor pool and off-set any unexpected drops from traditional markets. As one of the first destinations in these markets, this strategy proved strong after the global recession, as visitation from emerging markets hit record levels, despite a plateau in European travel.



Source: NYC & Company/OTTI



## Reaching New Audiences

---

New York City's tourism industry touches and supports a variety of different people, industries and businesses across all five boroughs. In order to advance New York City's tourism industry and reach our initial 50 million visitor goal, NYC & Company began to target new audiences by highlighting activities, attractions and travel offers tailored to their interests. To amplify these efforts, we worked with our partners and members in the industry to identify and create the best vehicles and practices for tapping into these demographics. Whether through strategic global-press outreach and tours, new borough- and neighborhood-focused marketing initiatives, original online editorial content, or tour operator and travel agent training programs, we promoted the energy and vibrancy of all five boroughs in a truly comprehensive and groundbreaking way. Underlying these different engagement strategies was a concerted effort to diversify our consumer base and speak directly to groups such as repeat, family, LGBT and youth travelers. As a result, both new and repeat visitors of all backgrounds and interests are now exploring more of the City than ever before.

## Repeat Visitors

Repeat visitors are a key demographic to help grow visitation to the City. After previously visiting many of the traditional tourist spots, repeat visitors seek new experiences and are often attracted to the lesser-known tourist areas of the City. Most recently, the organization launched Neighborhood x Neighborhood, a five-borough communications campaign designed to drive visitors and locals to off-the-beaten-path areas.

## LGBT

The passage of marriage equality in New York provided the City with an opportunity to cement its reputation as a hub for LGBT travelers. To this end, NYC & Company has launched several marketing initiatives catering to LGBT travelers, including the Rainbow Pilgrimage to celebrate the 40th anniversary of the modern gay-rights movement and the NYC I Do campaign for those looking to hold weddings and honeymoons in the City. **In fact, same sex marriage generated in the first year approximately \$259 million in annual economic impact for New York City.**

## Youth

To attract the youth traveler, NYC & Company launched the NYC<30 campaign to showcase the City as a rite of passage, complete with itineraries that promote hotels, restaurants, cultural offerings and attractions of interest to the youth market. Additionally, NYC & Company supports the City's plan to introduce a licensing model for for-profit hostels. **The legalization of hostels is projected to bring 175,000 new visitors and \$170 million in economic impact to the City annually.**

## Family

NYC & Company saw an opportunity to increase its share of the family travel market and created the Official NYC Family Ambassador program, a multilayered marketing initiative to promote New York City as a family-friendly vacation destination. **Since the launch of the Family Ambassador initiative, the City has seen a 15% increase in family travel.**

## Seniors

The senior travel market represents a great opportunity for New York City, as their growing size and more flexible travel schedules make them a perfect group to market to during the City's traditional needs periods. NYC & Company has worked closely with AARP to develop programs to reach this market, including special access to Broadway Week tickets. Moving forward, NYC & Company and AARP will continue their collaborative efforts and identify additional opportunities, special offers and experiences to help reach this important market.



# NYC & Company Programs and Initiatives



### Official NYC Family Ambassadors

In order to grow the City's share of the family travel market, the Official NYC Family Ambassador program was launched to highlight the best ways for families to enjoy dining and shopping venues, cultural institutions, and parks and attractions across the five boroughs. Family Ambassadors have included Dora the Explorer, The Muppets, Sesame Street, The Smurfs and Where's Waldo? The program highlighted family-friendly locations across all five boroughs, including the American Museum of Natural History, the Bronx Zoo, Brooklyn Bridge Park, Coney Island, aboard the East River Ferry, MoMA PS1, the Museum of the Moving Image, Rockaway Beach and Snug Harbor.



### NYC I Do

When New York became the sixth state in the United States to legalize same-sex marriage, NYC & Company launched the NYC I Do campaign to position New York City as a one-of-a-kind wedding destination and encourage more people to get married and honeymoon in the City.





## NYC Restaurant Week

NYC & Company's proprietary semiannual dining promotion is designed to both showcase the unparalleled quality of New York City's restaurants and increase traffic during a traditionally slower period for the industry. The program gives residents and visitors an opportunity to experience fine dining at a great value.



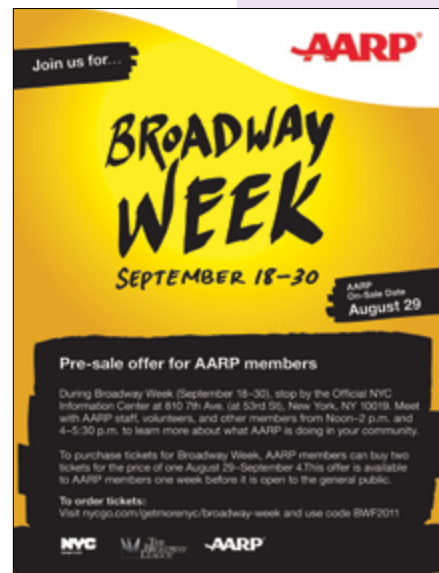
## Destination Harlem

Destination Harlem was launched in February 2011 and promoted the neighborhood's unique cultural, shopping and dining options. The campaign coincided with the opening of the Aloft Harlem, the first new hotel to open in Harlem since 1967.



### Broadway Week

Broadway Week gives visitors and locals an opportunity to experience popular, big-name shows at a great value. During the promotion, theater-goers can purchase two-for-one tickets to select Broadway shows.



GET MORE NYC

# BROADWAY WEEK

## 2-FOR-1 TICKETS

### SEPTEMBER 18-30

**ON SALE SEPT. 5**

[NYCGO.COM/GETMORENYC](http://NYCGO.COM/GETMORENYC)

Sponsors: NYC, THE BROADWAY LEAGUE, AMTRAK, AARP

Conditions apply.

### Off-Broadway Week

In partnership with the Off-Broadway League, this campaign provides consumers with two-for-one theater tickets during slower months for tourism and theater attendance. Off-Broadway shows give visitors and locals a more intimate look at some of theater's finest offerings.

GET MORE NYC

# OFF BROADWAY WEEK

## 2-FOR-1 TICKETS

### SEPTEMBER 26 - OCTOBER 9

**ON SALE SEPT. 5**

[NYCGO.COM/GETMORENYC](http://NYCGO.COM/GETMORENYC)

Media Partner: Time Out New York

GET MORE NYC

## 2-FOR-1 TICKETS

### SEPTEMBER 26 - OCTOBER 9

**BOOK NOW**

NYC OFF BROADWAY LEAGUE

**ON SALE NOW**  
[NYCGO.COM/OFFBROADWAYWEEK](http://NYCGO.COM/OFFBROADWAYWEEK)

SEPT 26 - OCT 9

Conditions apply.



## Comedy Week

Launched in 2011 to coincide with the New York Comedy Festival, Comedy Week included free comedy shows, special comedy tours, a mobile scavenger hunt and a special New York City-themed show at Upright Citizens Brigade for visitors and locals.

**NYC**  
The Official Guide  
nycgo.com

**COMEDY WEEK** NOV 5-11

For a chance to win tickets to **KEY & PELLE** Live! on Nov 7 follow us on Twitter @nycgo.

**Free laughs ABOUND!**  
Great FREE shows you can enjoy as part of Comedy Week throughout New York City.

**The Comedy Bus with Gray Line**  
Top improv performers from the legendary comedy troupe the Upright Citizen's Brigade will lead a double-decker bus tour of downtown NYC's most notable landmarks.  
Date: Monday, November 5  
[more.](#)

**Interview with Key**  
Half of the Comedy Central duo talks about Apple, Obama's anger translator and their upcoming free show.

**Jimmy Kimmel**  
7 days a week, you can find famous, soon-to-be-famous and hilarious-but-will-never-be-famous comedians performing stand-up, sketch and improv comedy throughout the five boroughs.

**NYC Comedy Calendar**  
7 days a week, you can find famous,

**COMEDY WEEK**  
NOVEMBER 5-11

nycgo.com/comedy

**NEW YORK COMEDY FESTIVAL**  
NOVEMBER 7-11

## Neighborhood x Neighborhood

Launched in March 2013, Neighborhood x Neighborhood is a communications initiative designed to support local businesses and encourage tourism in the neighborhoods outside of the traditional tourist locations across the five boroughs.

**NEIGHBORHOOD X NEIGHBORHOOD**

EXPLORE THE CITY WITH THIS GUIDE TO MUST-VISIT SPOTS THROUGHOUT NYC.

**NEIGHBORHOOD X NEIGHBORHOOD**

EXPLORE THE CITY WITH THIS GUIDE TO MUST-VISIT SPOTS THROUGHOUT NYC.

**NEIGHBORHOOD X NEIGHBORHOOD**

THIS MONTH'S HIGHLIGHT:  
**Brooklyn Neighborhood Guide**

Learn about some of the best spots in Brooklyn, including the Brooklyn Museum, the Barclays Center, and the Brooklyn Museum.



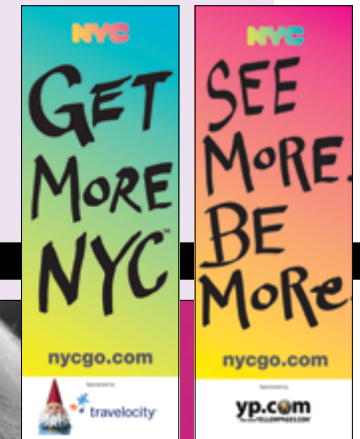
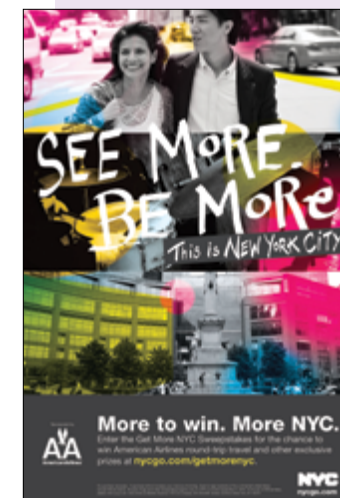
### Just Ask the Locals

Launched in April 2008, Just Ask the Locals called on visitors and locals to share suggestions on what to see and do in neighborhoods across the five boroughs, including Astoria, Bay Ridge, Belmont, Chelsea, Harlem, Jackson Heights and Park Slope. The campaign featured 37 celebrity and local experts, including Sean “Diddy” Combs, Danny Meyer and Tim Gunn, each offering their own local tips on the City’s best food, music, nightlife and fashion.



### Get More NYC

A citywide campaign, Get More NYC provided exclusive offers at restaurants, retail shops, cultural institutions, Broadway, transportation and attractions. The neighborhoods represented in the program included Fort Greene, Long Island City, Lower East Side, Park Slope, Rockaway, Tremont and Wave Hill. This program was replicated as Get More Lower Manhattan in May 2011 to celebrate and promote the resurgence and revitalization of the entire downtown area.





### Staten Island Food Truck Festival

Launched in cooperation with Staten Island Borough President's Office, the Staten Island Food Truck Festival was held along the St. George Esplanade, adjacent to the ferry terminal, with the goal of encouraging visitation on Staten Island beyond the ferry. In addition to the myriad food trucks NYC & Company produced graphics and walking maps of the surrounding areas for visitors to explore.



### Nine in '09

Working with the City Council, this campaign showcased nine of the most unique and authentic neighborhoods for visitors, highlighting cultural institutions to draw residents and tourists alike. The nine neighborhood represented across all five boroughs include were Arthur Avenue, Astoria, Brighton Beach, El Barrio, Flatbush, Jackson Heights, Koreatown, Little Ireland and Little Sri Lanka.

## Destination: Brighton Beach, Brooklyn

► **Russian samovar.** Indulge yourself in the restaurants on Brighton Beach Avenue.

WELCOME TO  
VIST 9 IN '09  
BRIGHTON BEACH, BROOKLYN

BY SUBWAY: R, Q to Brighton Beach.  
BY BUS: B6, B6A.

DISCOVER HOW TO EXPERIENCE MORE IN BRIGHTON BEACH AND ALL THE 9 IN '09 NEIGHBORHOODS AT NYC&CO.COM/DESTINATIONS.

**NYC** & Company The New York City Council

This is New York City:™

ARTHUR AVENUE, BRONX	FLATBUSH, BROOKLYN	ASTORIA, QUEENS
LITTLE IRELAND, BRONX	EL BARRIO/SPANISH HARLEM, MANHATTAN	JACKSON HEIGHTS, QUEENS
BRIGHTON BEACH, BROOKLYN	KOREATOWN, MANHATTAN	LITTLE SRI LANKA, STATEN ISLAND

## Destination: Koreatown, Manhattan

► **Ginseng root.** Enjoy it fresh—with your meal or at the spa.

WELCOME TO  
VIST 9 IN '09  
KOREATOWN, MANHATTAN

BY SUBWAY: N, R, 4, 5, 6, 7, M, J to 34th St. (Manhattan) or 34th St. (Queens).  
BY BUS: M20, M20A, M20B, M20C, M20D, M20E, M20F, M20G, M20H, M20I, M20J, M20K, M20L, M20M, M20N, M20O, M20P, M20Q, M20R, M20S, M20T, M20U, M20V, M20W, M20X, M20Y, M20Z, M20AA, M20AB, M20AC, M20AD, M20AE, M20AF, M20AG, M20AH, M20AI, M20AJ, M20AK, M20AL, M20AM, M20AN, M20AO, M20AP, M20AQ, M20AR, M20AS, M20AT, M20AU, M20AV, M20AW, M20AX, M20AY, M20AZ, M20BA, M20BB, M20BC, M20BD, M20BE, M20BF, M20BG, M20BH, M20BI, M20BJ, M20BK, M20BL, M20BM, M20BN, M20BO, M20BP, M20BQ, M20BR, M20BS, M20BT, M20BU, M20BV, M20BW, M20BX, M20BY, M20BZ, M20CA, M20CB, M20CC, M20CD, M20CE, M20CF, M20CG, M20CH, M20CI, M20CJ, M20CK, M20CL, M20CM, M20CN, M20CO, M20CP, M20CQ, M20CR, M20CS, M20CT, M20CU, M20CV, M20CW, M20CX, M20CY, M20CZ, M20DA, M20DB, M20DC, M20DD, M20DE, M20DF, M20DG, M20DH, M20DI, M20DJ, M20DK, M20DL, M20DM, M20DN, M20DO, M20DP, M20DQ, M20DR, M20DS, M20DT, M20DU, M20DV, M20DW, M20DX, M20DY, M20DZ, M20EA, M20EB, M20EC, M20ED, M20EE, M20EF, M20EG, M20EH, M20EI, M20EJ, M20EK, M20EL, M20EM, M20EN, M20EO, M20EP, M20EQ, M20ER, M20ES, M20ET, M20EU, M20EV, M20EW, M20EX, M20EY, M20EZ, M20FA, M20FB, M20FC, M20FD, M20FE, M20FF, M20FG, M20FH, M20FI, M20FJ, M20FK, M20FL, M20FM, M20FN, M20FO, M20FP, M20FQ, M20FR, M20FS, M20FT, M20FU, M20FV, M20FW, M20FX, M20FY, M20FZ, M20GA, M20GB, M20GC, M20GD, M20GE, M20GF, M20GG, M20GH, M20GI, M20GJ, M20GK, M20GL, M20GM, M20GN, M20GO, M20GP, M20GQ, M20GR, M20GS, M20GT, M20GU, M20GV, M20GW, M20GX, M20GY, M20GZ, M20HA, M20HB, M20HC, M20HD, M20HE, M20HF, M20HG, M20HH, M20HI, M20HJ, M20HK, M20HL, M20HM, M20HN, M20HO, M20HP, M20HQ, M20HR, M20HS, M20HT, M20HU, M20HV, M20HW, M20HX, M20HY, M20HZ, M20IA, M20IB, M20IC, M20ID, M20IE, M20IF, M20IG, M20IH, M20II, M20IJ, M20IK, M20IL, M20IM, M20IN, M20IO, M20IP, M20IQ, M20IR, M20IS, M20IT, M20IU, M20IV, M20IW, M20IX, M20IY, M20IZ, M20JA, M20JB, M20JC, M20JD, M20JE, M20JF, M20JG, M20JH, M20JI, M20JJ, M20JK, M20JL, M20JM, M20JN, M20JO, M20JP, M20JQ, M20JR, M20JS, M20JT, M20JU, M20JV, M20JW, M20JX, M20JY, M20JZ, M20KA, M20KB, M20KC, M20KD, M20KE, M20KF, M20KG, M20KH, M20KI, M20KJ, M20KL, M20KM, M20KN, M20KO, M20KP, M20KQ, M20KR, M20KS, M20KT, M20KU, M20KV, M20KW, M20KX, M20KY, M20KZ, M20LA, M20LB, M20LC, M20LD, M20LE, M20LF, M20LG, M20LH, M20LI, M20LJ, M20LK, M20LL, M20LM, M20LN, M20LO, M20LP, M20LQ, M20LR, M20LS, M20LT, M20LU, M20LV, M20LW, M20LX, M20LY, M20LZ, M20MA, M20MB, M20MC, M20MD, M20ME, M20MF, M20MG, M20MH, M20MI, M20MJ, M20MK, M20ML, M20MM, M20MN, M20MO, M20MP, M20MQ, M20MR, M20MS, M20MT, M20MU, M20MV, M20MW, M20MX, M20MY, M20MZ, M20NA, M20NB, M20NC, M20ND, M20NE, M20NF, M20NG, M20NH, M20NI, M20NJ, M20NK, M20NL, M20NM, M20NN, M20NO, M20NP, M20NQ, M20NR, M20NS, M20NT, M20NU, M20NV, M20NW, M20NX, M20NY, M20NZ, M20OA, M20OB, M20OC, M20OD, M20OE, M20OF, M20OG, M20OH, M20OI, M20OJ, M20OK, M20OL, M20OM, M20ON, M20OO, M20OP, M20OQ, M20OR, M20OS, M20OT, M20OU, M20OV, M20OW, M20OX, M20OY, M20OZ, M20PA, M20PB, M20PC, M20PD, M20PE, M20PF, M20PG, M20PH, M20PI, M20PJ, M20PK, M20PL, M20PM, M20PN, M20PO, M20PP, M20PQ, M20PR, M20PS, M20PT, M20PU, M20PV, M20PW, M20PX, M20PY, M20PZ, M20QA, M20QB, M20QC, M20QD, M20QE, M20QF, M20QG, M20QH, M20QI, M20QJ, M20QK, M20QL, M20QM, M20QN, M20QO, M20QP, M20QQ, M20QR, M20QS, M20QT, M20QU, M20QV, M20QW, M20QX, M20QY, M20QZ, M20RA, M20RB, M20RC, M20RD, M20RE, M20RF, M20RG, M20RH, M20RI, M20RJ, M20RK, M20RL, M20RM, M20RN, M20RO, M20RP, M20RQ, M20RR, M20RS, M20RT, M20RU, M20RV, M20RW, M20RX, M20RY, M20RZ, M20SA, M20SB, M20SC, M20SD, M20SE, M20SF, M20SG, M20SH, M20SI, M20SJ, M20SK, M20SL, M20SM, M20SN, M20SO, M20SP, M20SQ, M20SR, M20SS, M20ST, M20SU, M20SV, M20SW, M20SX, M20SY, M20SZ, M20TA, M20TB, M20TC, M20TD, M20TE, M20TF, M20TG, M20TH, M20TI, M20TJ, M20TK, M20TL, M20TM, M20TN, M20TO, M20TP, M20TQ, M20TR, M20TS, M20TT, M20TU, M20TV, M20TW, M20TX, M20TY, M20TZ, M20UA, M20UB, M20UC, M20UD, M20UE, M20UF, M20UG, M20UH, M20UI, M20UJ, M20UK, M20UL, M20UM, M20UN, M20UO, M20UP, M20UQ, M20UR, M20US, M20UT, M20UU, M20UV, M20UW, M20UX, M20UY, M20UZ, M20VA, M20VB, M20VC, M20VD, M20VE, M20VF, M20VG, M20VH, M20VI, M20VJ, M20VK, M20VL, M20VM, M20VN, M20VO, M20VP, M20VQ, M20VR, M20VS, M20VT, M20VU, M20VV, M20VW, M20VX, M20VY, M20VZ, M20WA, M20WB, M20WC, M20WD, M20WE, M20WF, M20WG, M20WH, M20WI, M20WJ, M20WK, M20WL, M20WM, M20WN, M20WO, M20WP, M20WQ, M20WR, M20WS, M20WT, M20WU, M20WV, M20WW, M20WX, M20WY, M20WZ, M20XA, M20XB, M20XC, M20XD, M20XE, M20XF, M20XG, M20XH, M20XI, M20XJ, M20XK, M20XL, M20XM, M20XN, M20XO, M20XP, M20XQ, M20XR, M20XS, M20XT, M20XU, M20XV, M20XW, M20XX, M20XY, M20XZ, M20YA, M20YB, M20YC, M20YD, M20YE, M20YF, M20YG, M20YH, M20YI, M20YJ, M20YK, M20YL, M20YM, M20YN, M20YO, M20YP, M20YQ, M20YR, M20YS, M20YT, M20YU, M20YV, M20YW, M20YX, M20YY, M20YZ, M20ZA, M20ZB, M20ZC, M20ZD, M20ZE, M20ZF, M20ZG, M20ZH, M20ZI, M20ZJ, M20ZK, M20ZL, M20ZM, M20ZN, M20ZO, M20ZP, M20ZQ, M20ZR, M20ZS, M20ZT, M20ZU, M20ZV, M20ZW, M20ZX, M20ZY, M20ZZ

This is New York City:™

ARTHUR AVENUE, BRONX	FLATBUSH, BROOKLYN	ASTORIA, QUEENS
LITTLE IRELAND, BRONX	EL BARRIO/SPANISH HARLEM, MANHATTAN	JACKSON HEIGHTS, QUEENS
BRIGHTON BEACH, BROOKLYN	KOREATOWN, MANHATTAN	LITTLE SRI LANKA, STATEN ISLAND

## Destination: Little Sri Lanka, Staten Island

► **Mysore masala dosa.** Enjoy it with chutneys on Victory Boulevard.

WELCOME TO  
VIST 9 IN '09  
LITTLE SRI LANKA, STATEN ISLAND

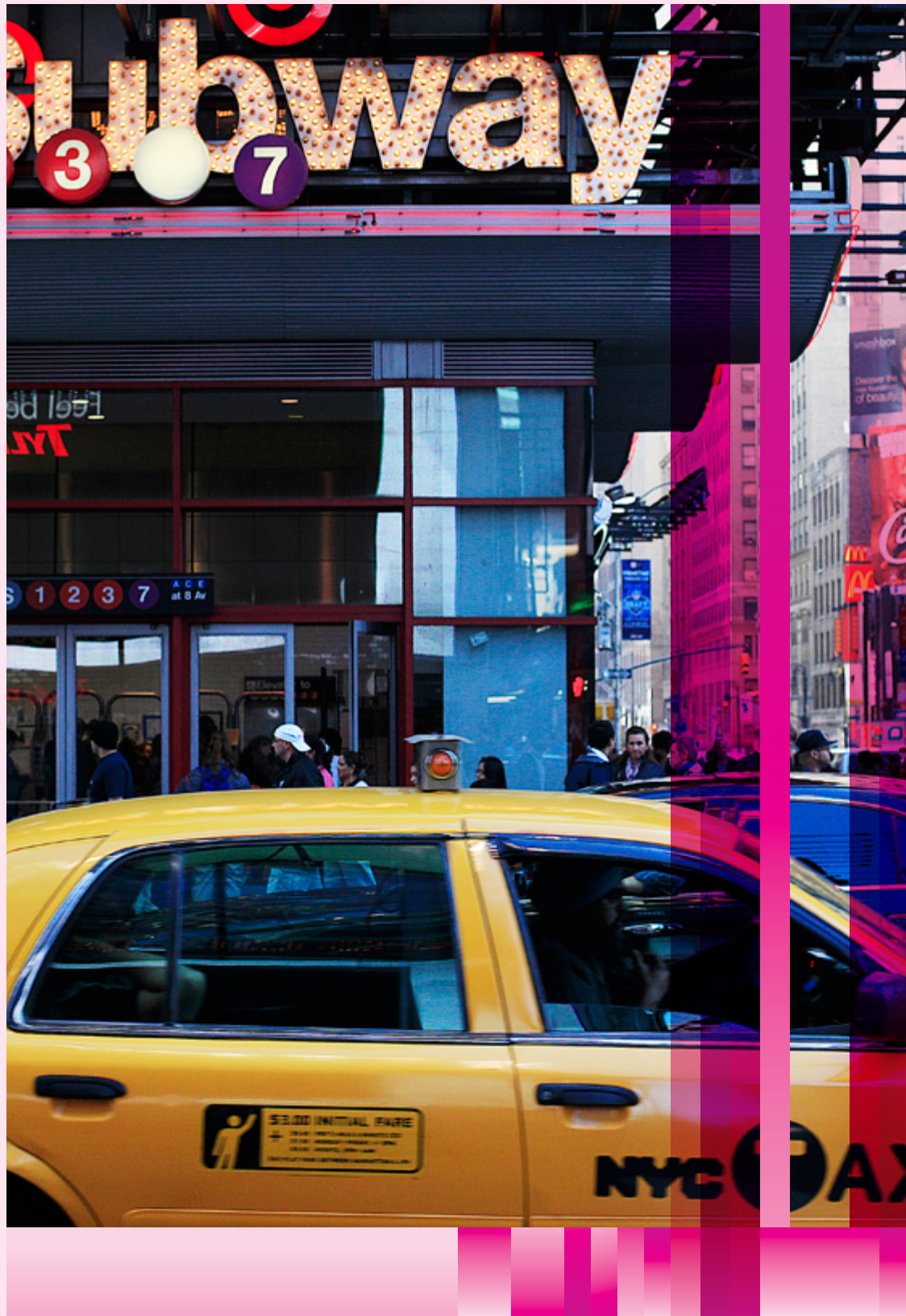
BY FERRY: Staten Island Ferry to St. George Ferry Terminal at 80th, 74th, 68th, 62nd, 56th, 50th, 44th, 38th, 32nd, 26th, 20th, 14th, 8th, 2nd, 1st.

DISCOVER HOW TO EXPERIENCE MORE IN LITTLE SRI LANKA AND ALL THE 9 IN '09 NEIGHBORHOODS AT NYC&CO.COM/DESTINATIONS.

**NYC** & Company The New York City Council

This is New York City:™

ARTHUR AVENUE, BRONX	FLATBUSH, BROOKLYN	ASTORIA, QUEENS
LITTLE IRELAND, BRONX	EL BARRIO/SPANISH HARLEM, MANHATTAN	JACKSON HEIGHTS, QUEENS
BRIGHTON BEACH, BROOKLYN	KOREATOWN, MANHATTAN	LITTLE SRI LANKA, STATEN ISLAND



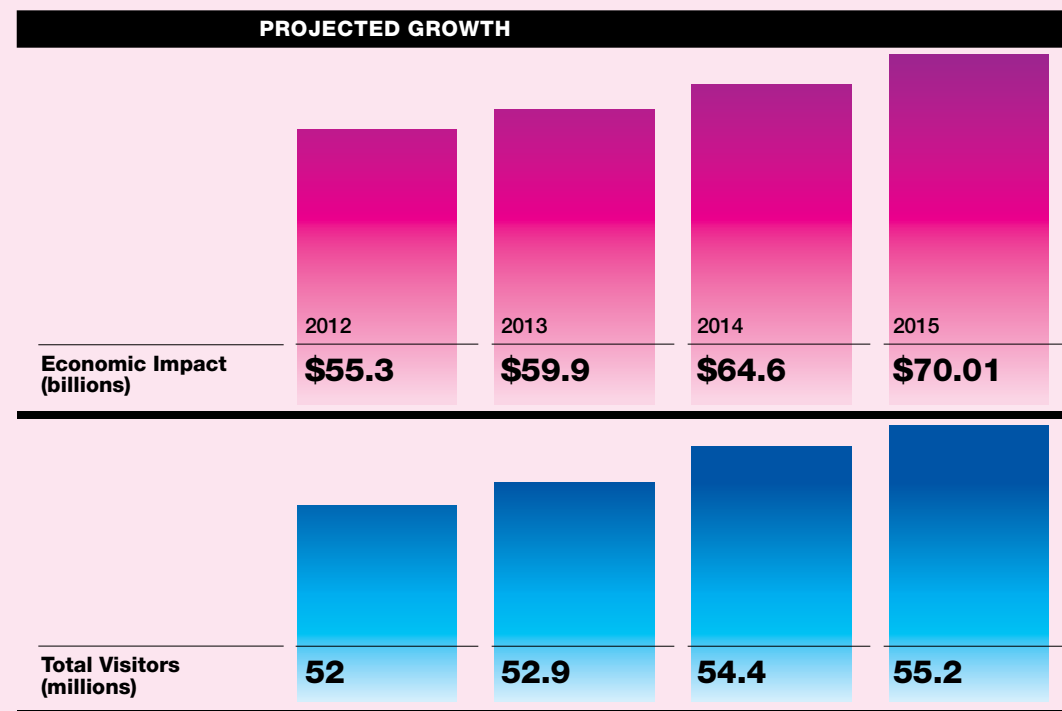
# Keeping the Momentum Going



# NYC & Company announced a new target for the industry: 55 million visitors and \$70 billion in economic impact by 2015.

The announcement took place at the premier international tourism convention, held in 2012 in Los Angeles, and left little doubt that New York City was the premier travel destination in the country, if not the world.

The new goal also symbolically represented NYC & Company's approach to travel and tourism—an open acknowledgement to the current economic strength and future potential of the industry. By setting such an ambitious economic impact target, the organization hoped to highlight the undeniable importance of tourism to the City's economy both now and in the years to come.



Source: NYC & Company/Tourism Economics

## A Future Bright with Potential

The future of the City's tourism industry remains exceptionally bright. Currently, NYC & Company projects overall visitation to rise by 2% in 2013 to a record 52.9 million visitors. In addition, by the end of the year, the industry is expected to add 12,000 jobs, a 3.3% increase. Much of this growth will be spurred by the continued increases in travel from some of our newer markets. For example, visitation from Brazil is expected to increase by 8.4%, while Chinese visitation is expected to grow by 8.8%.

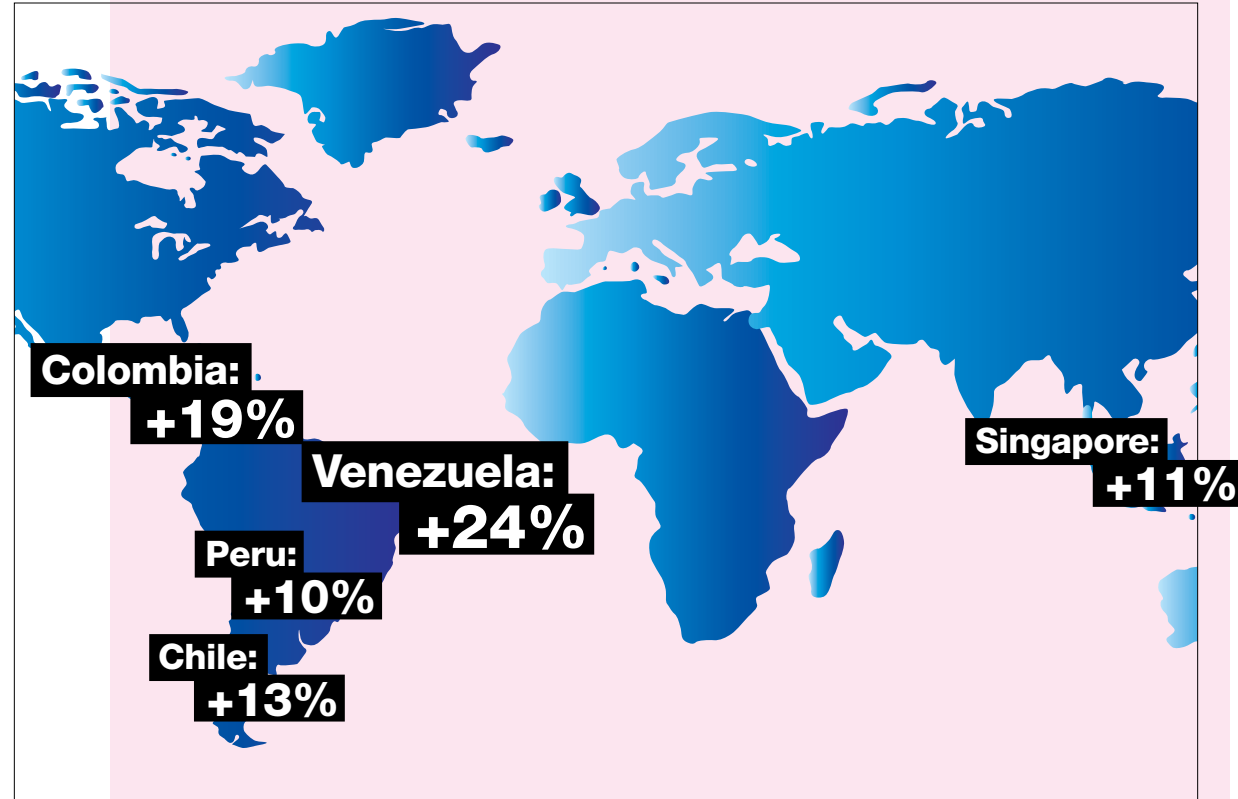
Beyond these markets, travel is strengthening across the board internationally. Current projections show 19 of our top 21 visitation markets will see an increase in visitors to NYC in 2013 alone. And by 2015, we are expecting every market to see higher visitation than current levels—meaning, of course, international travel records over the next three years.



Source: NYC & Company/Tourism Economics

Of course, such lofty ambitions require NYC & Company to stay ahead of the curve and identify new markets and new audiences and grow the City's pool of potential visitors. Much as we have already expanded our presence in Brazil, Australia, China and other markets, NYC & Company has already identified countries in South and Central America along with Asia as new targets for promoting travel to the five boroughs. Specifically for 2013, NYC & Company is already developing and promoting travel opportunities through trade shows and B2B efforts in Colombia, Chile, Venezuela, Peru and Singapore. Additionally, the organization has met with other international cities and is exploring the continuation of a city-to-city partnership program, which encourages reciprocal travel between destinations.

**PROJECTED VISITATION GROWTH TARGET MARKETS (2011–2013)**



Source: NYC & Company/Tourism Economics

**In the National Stage**

NYC & Company is recognized as a national leader for its expertise in destination marketing and promotion. In 2010 President Obama created the Corporation for Travel Promotion (now Brand USA)—the country's first-ever national marketing organization—and selected NYC & Company CEO George Fertitta to represent all US cities on its Board of Directors. Since joining the board, Fertitta has been named vice chairman for marketing and has played an important advisory role in developing the first-ever national tourism commercial.



**Protecting the City's Interests**

Through its presence at Brand USA and the Executive Committee of the U.S. Travel Association, NYC & Company has been able to give New York City a powerful voice in setting strategy and policy for America's tourism industry. Indeed, given our position as the country's top city destination, federal issues—from visitor entry to travel delays—directly impact NYC more than any other destination. Therefore, having a presence in national tourism forums is not only in the City's best interest but also a core business function to ensure the continued growth of our tourism industry.

**Champions for Reform and Investment**

As noted, international visitors have been essential to the exceptional growth of the last six years. They spend more, stay longer and have a genuine interest in exploring the whole of the City. Unfortunately, however, there are many impediments that make travel to the United States—and in turn New York City—quite difficult.

For example, obtaining a visa can be a long, drawn-out process for those who are not citizens of Visa Waiver Program countries.



Not only do potential visitors need to apply for a visa months in advance without guarantee of entry, but they often have to travel hours, if not days, to have an in-person interview and then wait several more weeks to be officially approved. NYC & Company, with support from the mayor's office, has been pushing for a more expedited process, including the expansion of the Visa Waiver Program to include countries like Brazil and Chile, an increase in consulate offices and video conferencing for long-distance interviews.

Current inflexible and restrictive visa policies, especially toward visitors from Asia and Latin America, are costing the country millions in lost tourism revenue. Although we have seen some improvements in wait times for visa seekers, particularly in Brazil, there is still much that needs to be done so that these potential visitors don't look to other global destinations with less-burdensome procedures.

Another national issue with a direct impact on New York City is airport delays as well as the general maintenance challenges facing the country's air transportation. Whether visitors are coming to visit the five boroughs or simply laying over to reach another destination, the sheer volume of flights arriving into the City's three major airports contribute to massive delays that end up costing the industry billions of dollars. Although costly, the construction of new terminals and runways and implementation of trafficking technology such as NextGen are necessary to maintaining a functional national airport system. Of course, securing funding for such measures is challenging in the current political and economical climate, but there are smaller investments, such as more Customs and Border Protection officers, as well as procedural improvements that should be explored immediately.

As the City prepares for 55 million visitors and even more growth well into the future, capital investment to improve our airport system will more and more become a necessity. NYC & Company will continue to champion for these reforms and investments both now and in the years to come and will be looking for continued support from City officials to ensure the best for New York City and the country.





# Our Industry



## **NYC & Company Committee Letters**

**In an effort to best serve and respond to the needs of such a diverse member base, NYC & Company established six board committees: Arts and Culture; Dining; Retail; Trade Shows; Hotels; and Broadway, Entertainment and Attractions. These committees help provide critical consumer insight from the private sector, often helping our organization create or enhance marketing and promotional initiatives to maximize business opportunities and grow tourism as a whole.**

**These industry-led committees have submitted the following letters to draw particular attention to the expectations and challenges facing the various sectors of the whole tourism industry.**

## **Arts and Culture**

New York City has long been recognized as a capital of arts and culture—a place where artists come to create and the world comes to be inspired. From museums to galleries and exhibitions to gardens, the arts and culture community of the five boroughs represents the style of the neighborhoods in which they are located and the diversity of the City as a whole.

As previously noted, cultural attendance has been steadily growing since 2006, and since then reaching record highs and proving to be an essential element to the majority of visitor itineraries. To ensure this continued success, the NYC & Company Arts and Culture Committee has been working on several initiatives to increase awareness of and support for the City's cultural community. For example, the newest cultural initiative, NYC Culture Collection, will launch this spring, offering promotions redeemable at a selection of cultural organizations with a particular emphasis on visual arts and family-friendly activities. The committee also will continue to explore a Cultural Rewards Pass Program and has been speaking with an array of institutions to determine the most appropriate and feasible program model.

Of course, despite the recent growth, our arts and culture sector still faces several challenges and requires continued support. Institutions such as the New York City Police Museum, the New York Aquarium, Snug Harbor and others are still getting back on their feet after super storm Sandy. Additionally, while attendance has been strong overall, the economy continues to affect the cultural community, particularly some of our smaller, lesser-known institutions.

The correlation between record-breaking tourism and record-breaking cultural attendance is not coincidental. Arts and culture is a huge part of the allure of New York City and an area that requires care, attention and financial support from our elected leaders. It is our sincere hope that the next administration will augment NYC & Company's efforts and prove to be a champion for arts and culture organizations of all sizes and from across all five boroughs.

### **NYC & Company Arts and Culture Committee**

**Gerri Warren Merrick** (Chair)  
WarrenMerrick  
Communications

**George Forbes**  
Off-Broadway League

**Lynn Kelly**  
Snug Harbor Cultural Center  
& Botanical Garden

**Molly Meloy**  
Brooklyn Academy  
of Music

**Mary Weitzman**  
Wave Hill

**Arts and culture is a huge part of the allure of New York City and an area that requires care, attention and financial support from our elected leaders.**

**Opening and operating a restaurant or bar in New York City can be a daunting process, involving numerous inspections, permits and approvals from an array of city agencies—occasionally resulting in fines that could have been avoided.**

## Dining

With thousands of restaurants and bars citywide, New York City is recognized around the world for its eclectic options—from an array of neighborhood gems to Zagat-rated fine dining. The City’s restaurant industry constitutes a major share of tourism jobs and helps capture the energy of New York City’s legendary nightlife, as dining continues to be one of the top visitor spending activities. To this end, NYC & Company dining programs try to incentivize visitors by showcasing the City’s breadth of cuisine and providing one-of-a-kind offers.

For example, the success of NYC Restaurant Week (which has spurred numerous copycat programs around the country) illustrates just how important the dining industry is to the five boroughs. The popularity of the 21-year-old dining promotion, which allows visitors and residents to enjoy some of the City’s best restaurants at an affordable price, is a testament to the allure and demand of one of the our largest business sectors. Indeed, over the past few years NYC & Company expanded NYC Restaurant Week into a multi-week, multi-season program with more than 300 participating establishments, 470,000 diners and over \$15 million in revenue for the restaurants.

Though the sector is growing, there are still some operational hurdles facing restaurateurs. Opening and operating a restaurant or bar in New York City can be a daunting process, involving numerous inspections, permits and approvals from an array of city agencies—occasionally resulting in fines that could have been avoided. The creation of the New Business Acceleration Team has helped expedite this process; however, in the future the next administration must remain attentive to these issues and continue outreach to ensure that local businesses understand city requirements and the services available to them.

By working with the City, substantial progress has been made in several areas, but more collaboration is needed to clarify the regulatory process. With rising operation costs and the living wage increase, the industry will be looking now more than ever for clarity and guidance from the next administration to help avoid unwarranted expenses. Dining is one of the major attractions of New York City, and it is also one of the major reasons why New Yorkers want to live here. Guests and residents alike are passionate about their dining choices, and New York City’s restaurant community offers the quality, variety and hospitality that makes our city the dining capital of the world. Together we can ensure the ongoing vibrancy of an industry that is essential to the very culture of New York City.

### NYC & Company Restaurant Committee

<b>Tracy Nieporent (Chair)</b> The Myriad Restaurant Group	<b>Rita Jammet</b> Bouquet Ventures, LLC/ La Caravelle Champagne	<b>Donna Rodriguez</b> BR Guest, Inc.
<b>Ken Biberaj</b> The Russian Tea Room	<b>B. Allan Kurtz</b> Gotham Hall	<b>Barbara Smith</b> B. Smith Enterprises
<b>David Burke</b> David Burke Kitchen	<b>Tony May</b> SD26	<b>Dennis Turcinovic</b> Delmonico’s
<b>Jacques Capsouto</b> Capsouto Freres	<b>Jee Won Park</b> Union Square Hospitality Group	<b>Tim Zagat</b> Zagat Survey
<b>Penny Glazier</b> The Glazier Group		

## Retail

New York City is home to some of the finest shopping in the world. From large department stores to small boutiques, there is something for every interest and price range in retail stores across the five boroughs. In fact, shopping is the most popular activity for visitors to the City and a significant driver of economic activity, accounting for almost 22% of all visitor spend. Over one-third of all domestic visitors and nine out of 10 international visitors shop during their stay in New York City—totaling over 23 million shoppers spending approximately \$8 billion annually.

Supporting the City’s retail community has long been a priority for NYC & Company. Almost every marketing program created by the organization encourages visitors, both domestic and international, along with locals to explore the wide array of retail options through special offers. For example, in 2012, we launched the Mix-n-Match campaign, a joint initiative with American Express to drive visitors and locals to more than 400 city merchants. The program resulted in almost \$3 million spent at local merchants, ranging from Macy’s to Brooklyn-based boutiques.

Though New York City’s retail industry is perhaps our most important tourist draw, it is also one of our most vulnerable. Shopping, particularly luxury and leisure shopping, is often at the mercy of the ebb and flow of the economy. City services and incentives to help small-business owners navigate the bureaucratic process or save on start-up costs have been helpful and must be continued. Similarly, the state sales tax exemption for purchases under \$110 has been altered in the past to help fill budget gaps. Protecting this important consumer tax break is a priority for the retail community and particularly smaller stores where the majority of purchases do not exceed this threshold.

Through various tax incentives and government programs, we must continue to support our businesses and find new ways to encourage consumer shopping. Marketing and promotional initiatives are only a piece—albeit a very successful one—of the puzzle, and retailers large and small will be looking to our elected officials for continued support and forward-thinking solutions.

### NYC & Company Retail Committee

<b>Patti Lee (Chair)</b> Macy’s	<b>Stacey Feder</b> The Shops at Columbus Circle	<b>Julie Gaines</b> Fishes Eddy
<b>Dana Argenti</b> Dylan’s Candy Bar	<b>Rachelle Friedman</b> J&R Computer and Music World	<b>Steve Lubomski</b> H&M
<b>Matt Bauer</b> Madison Avenue Business Improvement District		

**Though New York City’s retail industry is perhaps our most important tourist draw, it is also one of our most vulnerable.**



**While it is critical that a convention center remains in Midtown, there is no denying the opportunity and economic benefits of additional facilities—particularly in the boroughs beyond Manhattan where costs could potentially be lower.**

## Trade Shows

Conventions, meetings and trade shows are important economic drivers for New York City, filling our hotels, restaurants, attractions and cultural institutions with visitors from around the world. Yet cities around the country—particularly across the Northeast corridor—are aggressively trying to improve their own market share by providing these organizations with pricing incentives and other benefits that New York City cannot match. Still, New York City’s universal allure, large public transportation network and plethora of hotel and entertainment options remain our strongest competitive advantages.

With its centralized location and close proximity to major subway hubs, marquee Midtown hotels, bustling shopping areas and Broadway, the Jacob K. Javits Convention Center accentuates our strengths and attracts major shows. Despite some challenges and high costs, the truth is most organizers and delegates find the attendance boost that comes with being in the heart of the country’s greatest city well worth the investment and are more than willing to work around these issues. Furthermore, with the completion of the Javits Center expansion and renovations, the 7 train expansion and the Hudson Yards development project, Javits is quickly developing into a state-of-the-art convention center on par with any in the country.

In fact, Javits is so popular that few dates are available to accommodate all the shows looking to come to the City. To keep these shows in NYC, the five boroughs need more convention, meetings and trade show space. While it is critical that a convention center remains in Midtown, there is no denying the opportunity and economic benefits of additional facilities—particularly in the boroughs beyond Manhattan where costs could potentially be lower. With more space and facilities to recruit with, NYC & Company and the City would be able to more proactively target the meetings business in particular and generate millions in economic impact in the process. An ideal solution would be the Willets Point, Queens, development project that proposes a new convention center; however, we as an industry are open to exploring all options.

The bottom line is that the potential of the five boroughs has not been fully tapped. Areas across the City—particularly with access to hotels and transportation hubs—are missing out on millions of dollars from shows and delegates that were unable to find a suitable location. Looking ahead, we want to work with the City to find solutions. Investment and support will be needed to capture this lost business and grow New York City’s share of this lucrative market.

### NYC & Company Trade Shows Committee

Jack Withiam, Jr. (Chair)  
Exhibition Services &  
Management

Marian Bossard  
Toy Industry Association, Inc.

Dr. Robert Edwab  
Greater New York  
Dental Meeting

Mike Fiorentino  
International Association of  
Exhibitions and Events, New  
York Chapter

Mike Grant  
Reed Exhibitions

Britton Jones  
Business Journals, Inc.

Alan Liebenson  
New York International  
Automobile Show

Chris Nemchek  
Specialty Food Association

## Hotels

New York City’s hotel market is booming. There have been more rooms built than ever before and in more areas of the City than ever before, yet occupancy and room rates remain the strongest in the country. Indeed, hotels generated \$493 billion in hotel tax revenues for the City, while industry salaries average \$53,045—well above the citywide median of \$49,461. Most importantly, employment in this sector has grown significantly faster than the private sector as a whole and includes a diverse mix of both native and foreign-born New Yorkers from all five boroughs.

Also, hotel development has more than kept pace with the recent visitation boom. In fact, the array of new choices—from chic boutique hotels to globally celebrated brands to brand-new borough openings—is a critical tool to recruit new visitors across numerous demographics. By 2015, we expect to have more than 102,000 hotels rooms citywide with options for everyone from the business to the family traveler. This growth in inventory will also be critical in marketing to the groups and meetings market. NYC & Company has made great strides over the past seven years with its direct face-to-face recruitment approach—generating millions in business activity for the sector and the City.

Looking ahead, there are even more potential opportunities to keep this momentum going. For example, rezoning efforts could help launch new development projects that would create thousands of jobs and drive visitors to relatively low-traffic tourism areas. Additionally, the City must continue to crack down on the growth of illegal hotels and online apartment booking sites—this illegal practice takes away much-needed hotel tax revenue from city coffers with no consumer protections against fire- and health-code violations. Also, while the industry certainly understands the budgetary challenges the City has faced, continued hotel tax increases will begin to carve into bookings and deter travel to the City.

Nevertheless, our hotel industry far outpaces nearly every competitor, generating more than \$200 hundred million in tax revenue over cities like Los Angeles, Miami, Orlando and Philadelphia. To keep this momentum going and create more jobs, we implore our elected officials to push for regulation and legislative reform that will support—and not hinder—this critical sector. It is imperative we find ways to promote continued growth here and not leverage recent success for short-term fixes that may deter investment and visitation in the long run.

### NYC & Company Hotels Committee

David Keys (Chair)  
Hilton Hotels of New York

Matt Adams  
Grand Hyatt New York

Geoffrey Mills  
Crowne Plaza Times  
Square Manhattan

Scott Nadeau  
New York Marriott  
Marquis

Steven Pipes  
Le Parker Meridien

Joseph E. Spinnato, Esq.,  
CAE  
Hotel Association of  
New York City, Inc.

**To keep momentum going and create more jobs, we implore our elected officials to push for regulation and legislative reform that will support—and not hinder—this critical sector.**

**The next administration will be relied on to push forward and support exciting development and rebuilding projects that will help drive more visitation.**

## **Broadway, Entertainment and Attractions**

New York City's entertainment venues, world-class shows, sporting events, iconic landmarks and concert halls are a major draw for visitors. From Broadway to Off-Broadway, Yankee Stadium to Corona Park, Snug Harbor to the Brooklyn Botanic Garden, no other destination can offer such a wide range of globally recognized theater, sports, concerts and special events.

Broadway shows continue to be among the most popular activities for the City's visitors, with attendance steadily growing. In 2012 more than 12 million people attended a Broadway show—a 5% increase over 2011. In fact, to help drive visitors to the City's theaters during traditionally slow periods, NYC & Company created Broadway Week and Off-Broadway Week. Launched in 2011, the programs provide theater-goers with two-for-one ticket offers to acclaimed shows ranging from big-name Broadway hits to intimate Off-Broadway productions.

We are seeing similar success at major landmarks such as the Empire State Building, Top of the Rock and Coney Island. While emerging attractions like Brooklyn Bridge Park and the High Line are fast becoming must-see stops for visitors, especially the more intrepid international travelers. In addition to promoting the great attractions of the five boroughs, NYC & Company has helped recruit marquee events such as the 2013 Major League Baseball All-Star Game, the 2014 Formula 1 Grand Prix of America, the 2014 NCAA Regional Finals and, of course, Super Bowl XLVIII.

Looking ahead, these venues, attractions and special events will need the full support of the City. The Super Bowl, for example, will take place a mere 33 days after our next mayor takes the oath of office, and seamless coordination with NYC & Company and the host committee will be essential to making the event a ringing success. Similarly, the next administration will be relied on to push forward and support exciting development and rebuilding projects that will help drive more visitation. The National September 11 Memorial & Museum, the reopened Statue of Liberty, miles of bustling waterfronts, Kingsbridge Armory and the proposed Staten Island Ferris wheel will play instrumental roles in our push for 55 million visitors and \$70 billion in economic impact by 2015.

### **NYC & Company Broadway, Entertainment and Attractions Committee**

**Charles Flateman** (Chair)  
The Shubert Organization

**Bryan Dockett**  
Disney Theatrical Group

**Keith Douglas**  
Rockefeller Center  
Top of the Rock

**Joel Fisher**  
Madison Square Garden

**Jean-Yves Ghazi**  
Empire State Building  
Observatory

**Susan Lee**  
The Nederlander Organization

**Andreas Sappok**  
Hornblower Cruises & Events





## Executive Committee

Emily Rafferty  
Chairman

George Fertitta  
Chief Executive Officer

Michael Cardozo  
Ruben Diaz  
Joel Fisher  
Charles Flateman  
Ellen Futter  
Stephen Hanson  
Patricia E. Harris  
Hervé Houdré  
David Keys  
Patti Lee  
Kate D. Levin  
Thomas G. Lewis  
Lisa Linden  
Vera Manoukian  
Danny Meyer  
James L. Nederlander  
Tracy Nieporent  
John Rieman  
Joseph E. Spinnato  
Charlotte St. Martin  
Alan Steel  
Robert Steel  
Nick Valenti  
Peter Ward  
Gerri Warren Merrick  
Lloyd A. Williams  
Jack Withiam, Jr.  
Howard Wolfson  
Tim Zagat

## Senior Staff

George Fertitta  
Chief Executive Officer

Michael Asen  
Senior Vice President, Digital

Nevah Assang  
Senior Vice President, Creative & Content

Marnie Baretz  
Senior Vice President, Marketing

Kevin Booth  
Chief Financial Officer

Jerry Cito  
Senior Vice President,  
Convention Development

Kelly Curtin  
Executive Vice President, Membership &  
Destination Services

Fred Dixon  
Executive Vice President,  
Market Development

Bryan Grimaldi  
Chief Operating Officer  
General Counsel

Edward Hogikyan  
Senior Vice President, Marketing

Donna J. Keren  
Senior Vice President, Research & Analysis

Kimberly Spell  
Chief Communications Officer

Willy Wong  
Chief Creative Officer

## Contact Information

For media or other inquiries regarding *New York City Tourism: A Model for Success*, please contact:

**Kimberly Spell**  
Chief Communications Officer  
kspell@nycgo.com

**Ernesto Freire**  
Vice President, External and Government Affairs  
efreire@nycgo.com

**Emily Mayrath**  
Director, Communications  
emayrath@nycgo.com

NYC & Company  
810 Seventh Ave., 3rd fl.  
New York, NY 10019

+1 212 484 1270 tel  
press@nycgo.com

All research and data are current as of June 2013.

## Photo Credits

cover	page 21	page 44
Bart Barlow/ © RCPI Landmark Property	© Julienne Schaer/NYC & Company	© Joe Buglewicz/NYC & Company
inside front	page 22	page 47
© Julienne Schaer/NYC & Company	© Julienne Schaer/NYC & Company	© Will Steacy/NYC & Company
page 4	page 25	page 49
© Julienne Schaer/NYC & Company	Bart Barlow/ © RCPI Landmark Property	© Discover America
page 7	page 30	page 51
© Jen Davis/NYC & Company	© Phil Kline/NYC & Company	© Alex Lopez/NYC & Company
page 9	page 35	page 52
© Alex Lopez/NYC & Company	photographs from top:	© Clayton Cotterell/NYC & Company
page 10	© Joe Buglewicz/NYC & Company	page 61
© Joe Buglewicz/NYC & Company	© Phil Kline/NYC & Company	© Staten Island Borough President's Office
page 13	page 40	
© Julienne Schaer/NYC & Company	© Myrna Suarez	
page 15	page 41	
© Clayton Cotterell/NYC & Company	© RJ Shaughnessy/Giant Artist	
page 19	page 42	
© Joe Buglewicz/NYC & Company	© Peter Borghard/NYC & Company	
page 20	page 43	
© Alex Lopez/NYC & Company	clockwise from top right:	
	© fotosearch	
	© Jen Davis/NYC & Company	

