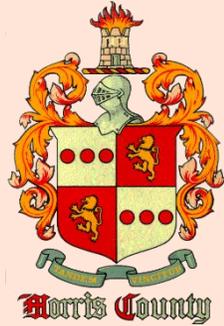




Morris County, NJ



Demographics, Trends and Issues

Compiled for the Morris County Strategic Plan Steering Committee

by JANUS Solutions

from Information Provided by Morris County

September 20, 2017

JANUS Solutions

Visionary strategies. Real world results.

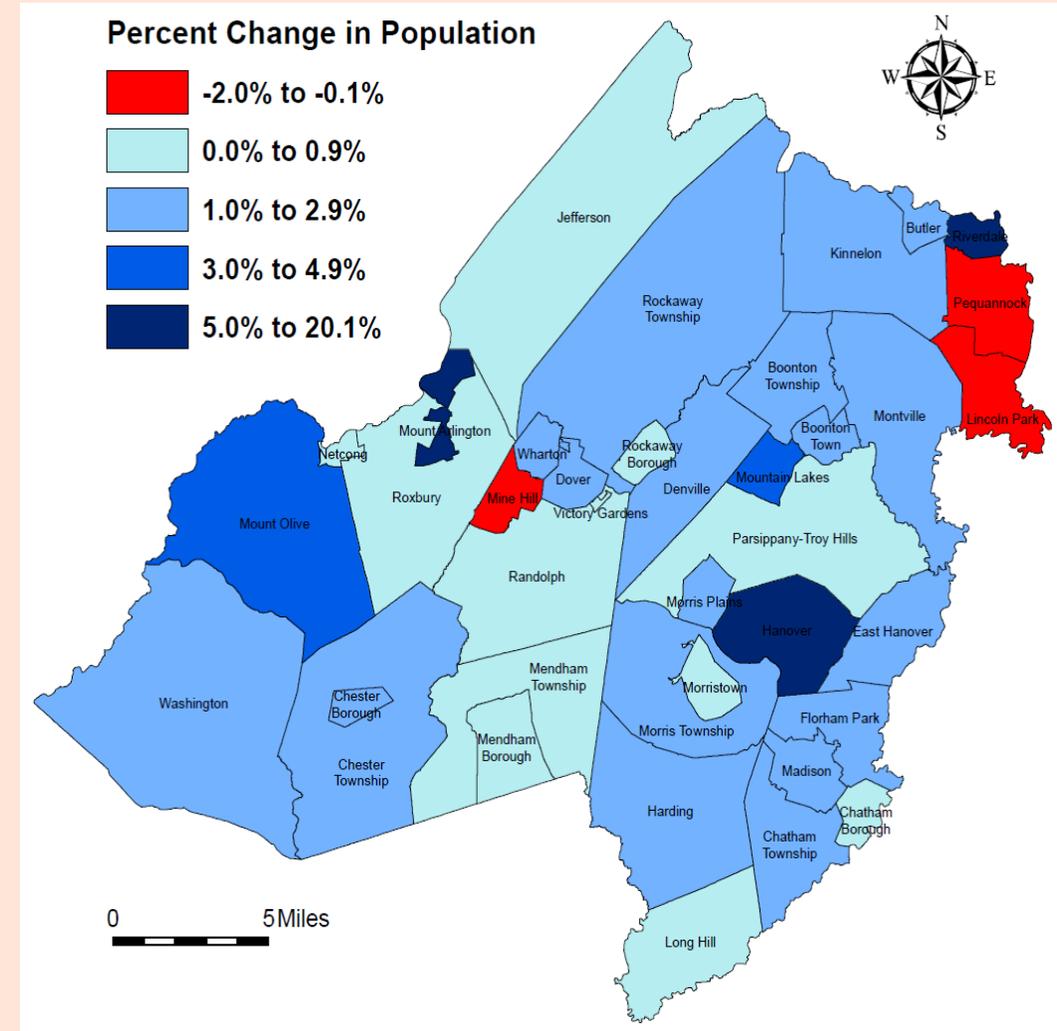
Listing of Contents

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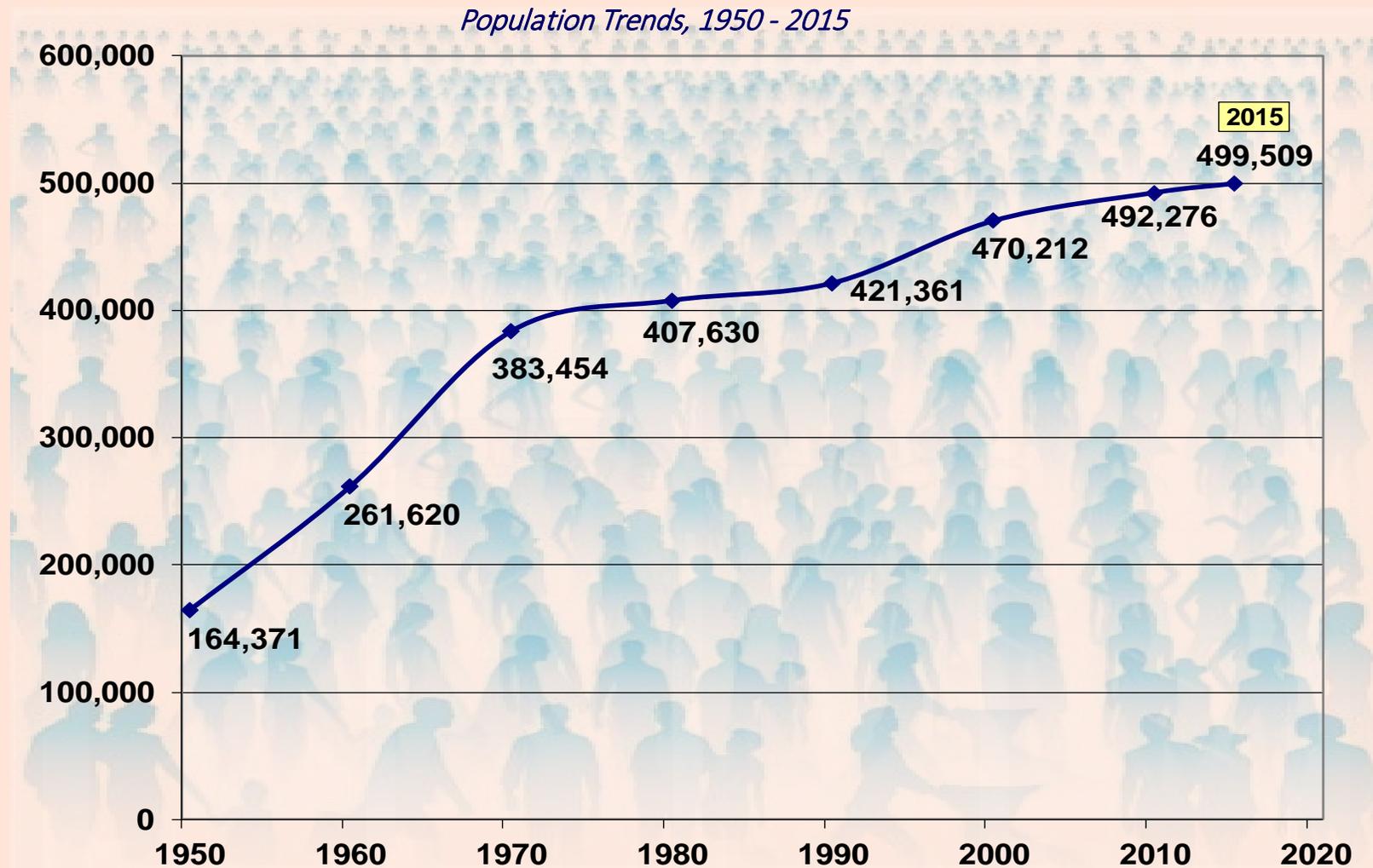
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County Snapshot

- 481.62 square miles
- Total population: 499,509
- 39 Municipalities
- \$332.1m budget for 2017
- 1800 County Employees
- County Departments: Employee Resources, Finance, Human Services, Information Technology, Law & Public Safety, and Public Works



While many counties in NJ are experiencing declining populations, Morris County is Growing - Slowly

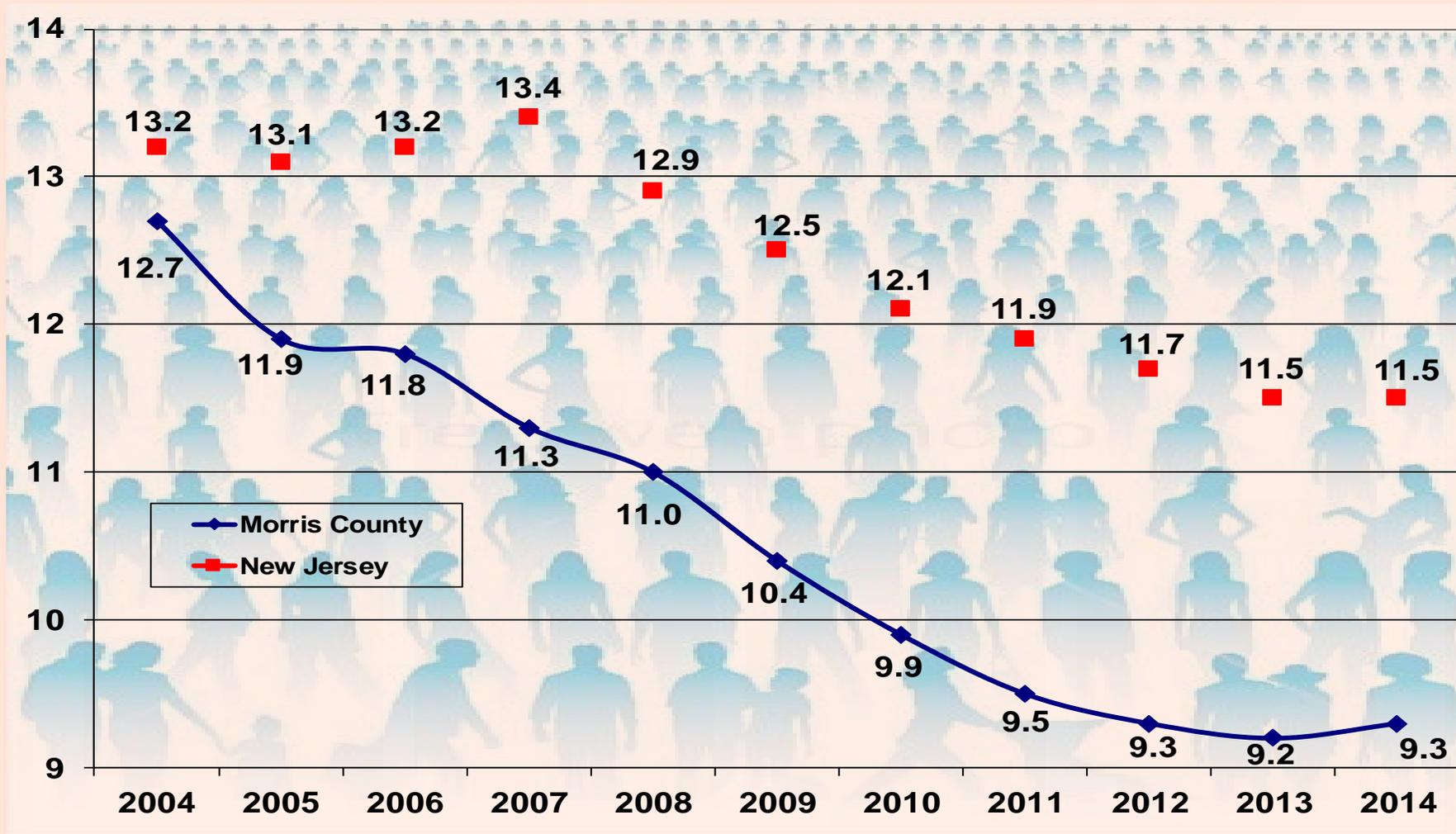


Source: U.S. Census Bureau,
Decennial Census and
Population Estimates Program



The Birth Rate Has Been Dropping

Birth Rate per Thousand, 2004 - 2014 Morris County vs. New Jersey



Source: New Jersey Department of Health



Current Population Growth is Driven by International Migration

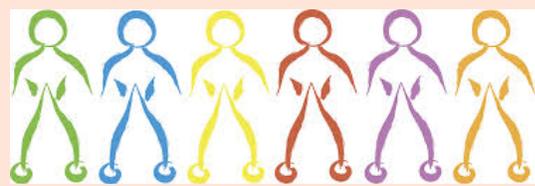
Morris County Components of Population Change 2010 – 2015

	Population Change	Natural Increase	Vital Events		Net Migration		
			Births	Deaths	Total	International	Domestic
Morris County	7,230	5,428	24,706	19,278	2,589	11,733	-9144
New Jersey	166,077	173,618	546,887	373,269	1,112	270,306	-269,194

Source: U.S. Census Bureau, Decennial Census and Population Estimates Program

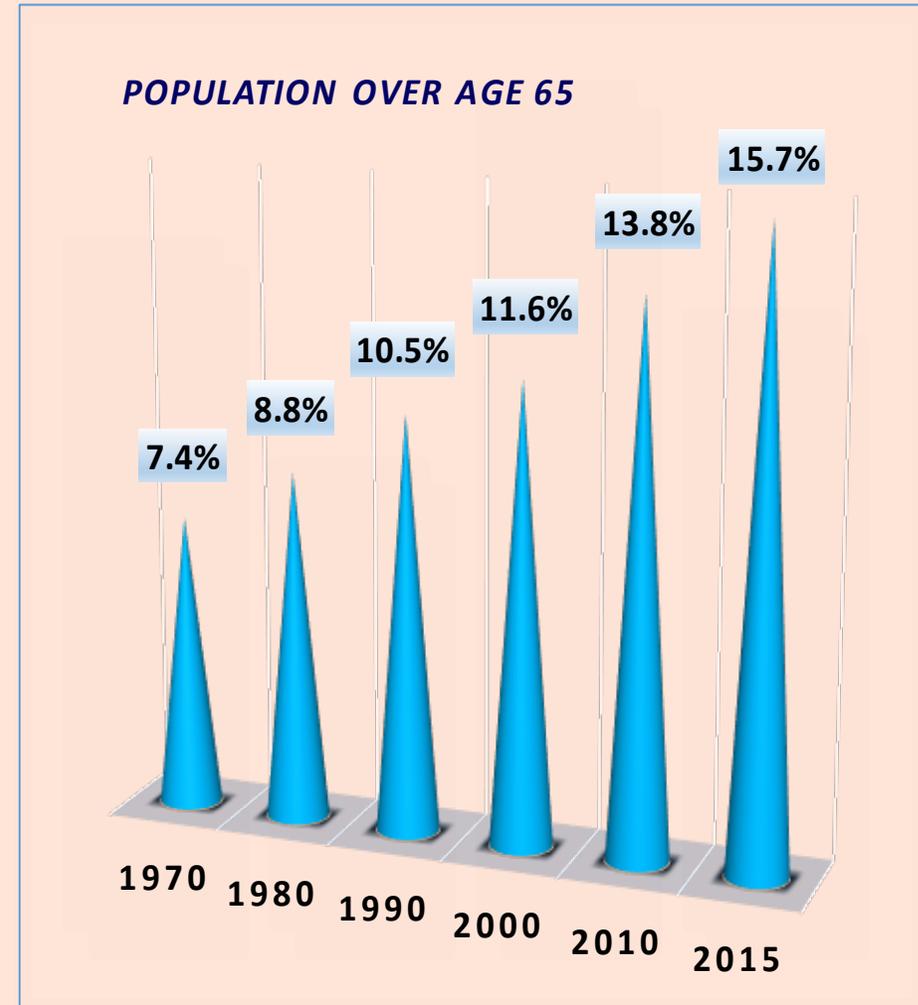
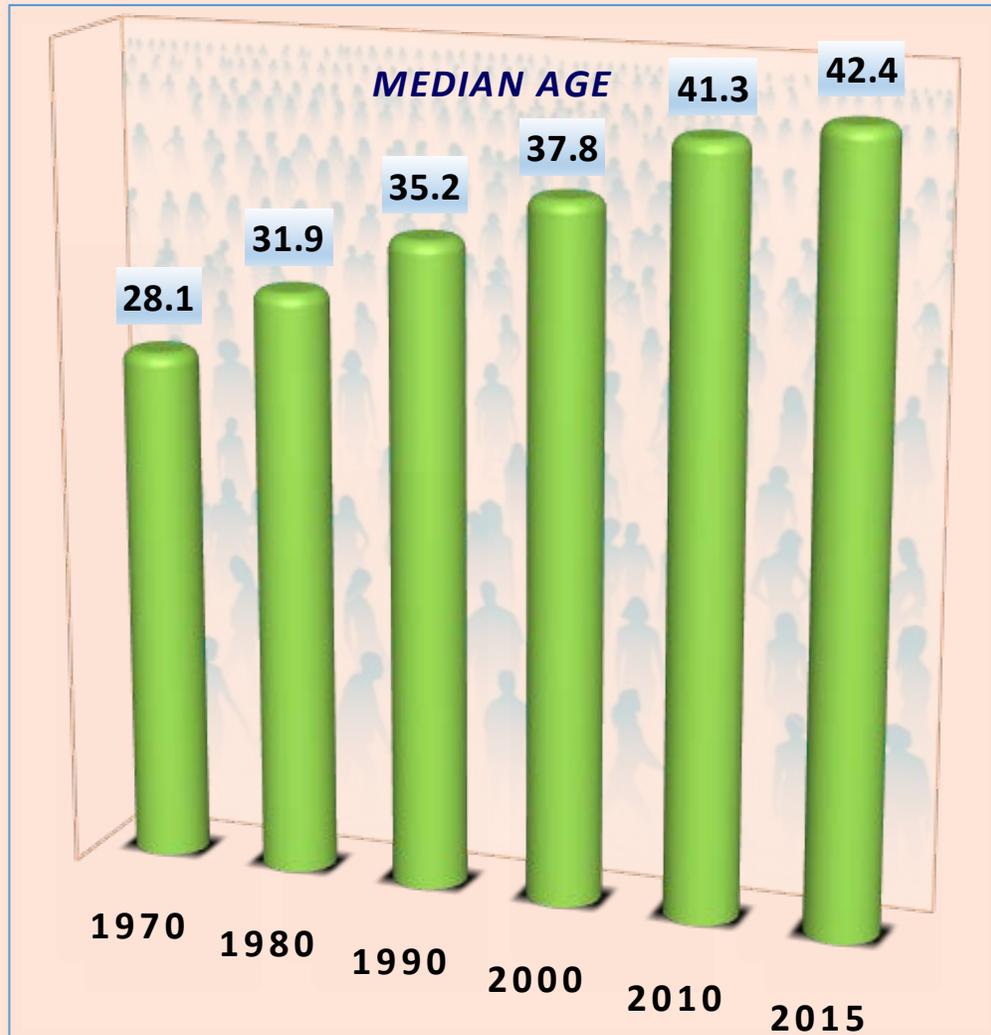
Morris County Population is Becoming More Diverse

Morris County Population by Race & Hispanic Origin

	2010	2015 Census	2034 NJDLWD
	Percent of Total Population	Percent of Total Population	Percent of Total Population
Not Hispanic or Latino			
White	75.1%	71.9%	63.7%
Black or African American	2.9%	3.1%	3.4%
Asian	8.9%	10.1%	14.0%
Other	0.3%	0.1%	0.1%
Two or more races	1.4%	1.8%	2.4%
Hispanic or Latino	11.5%	13.0%	16.5%

Source: U.S. Census Bureau, Decennial Census, American Community Survey, and N.J. Dept. of Labor & Workforce Development

The Population is Getting Older

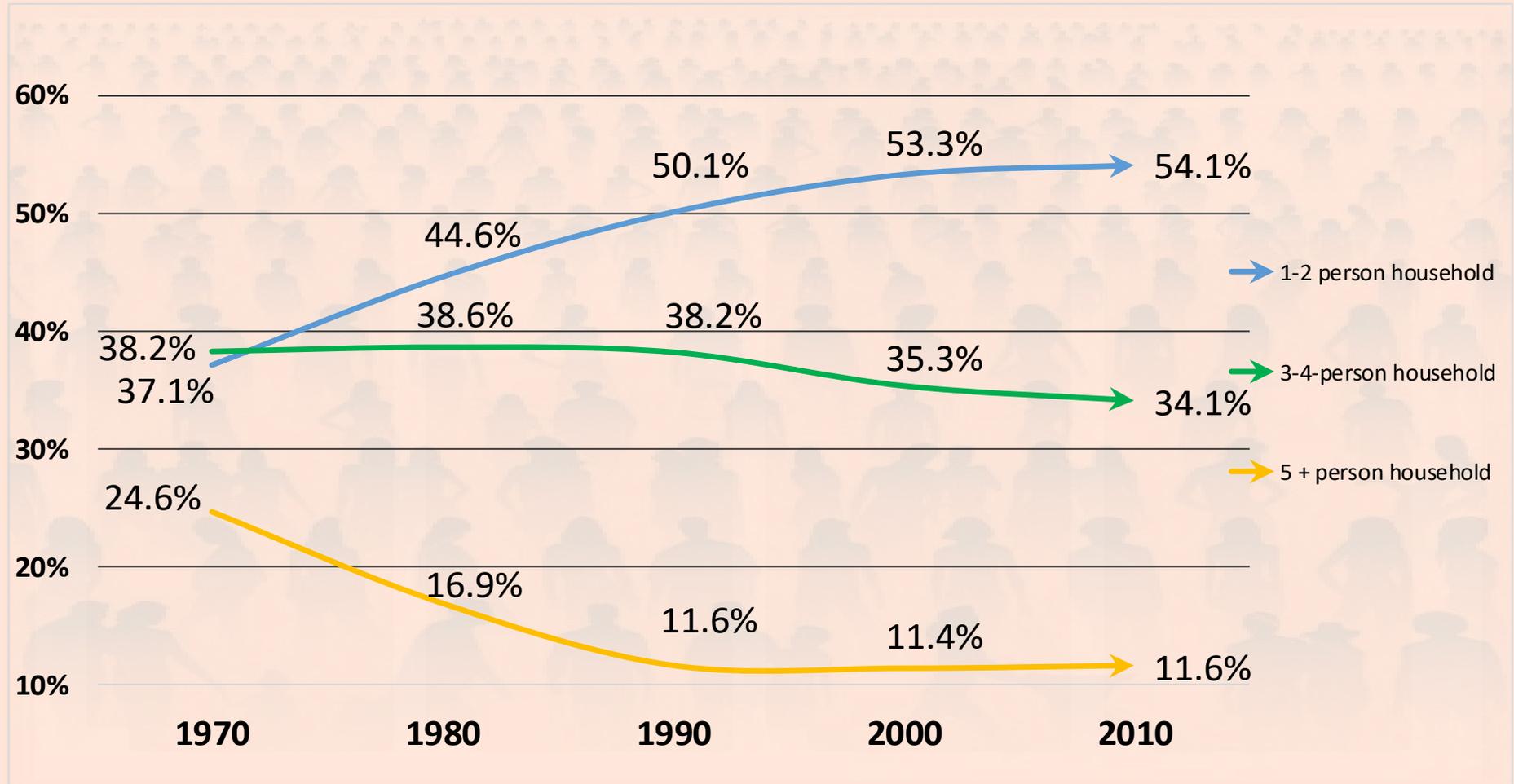


Source: U.S. Census Bureau, Decennial Census and American Community Survey



Household Sizes Are Shrinking

One–Two Person Households Are Dominant



Security Threats - Information Technology

Key Threats:

- Employees / End Users
- Malicious Cyber Actors
- Ransomware
- Zero-Day Malware
- Average Breach Costs \$3.8m

Crime

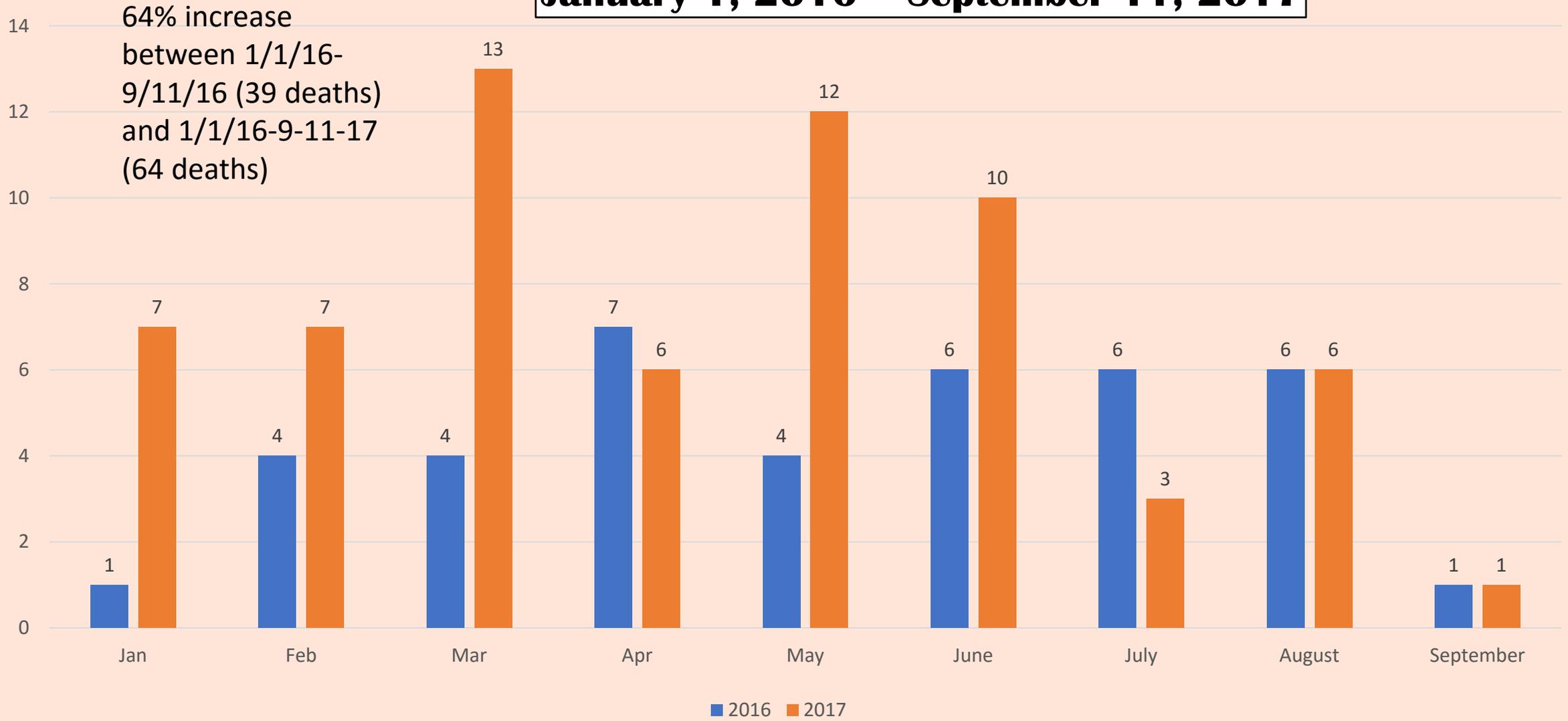
VOLUME/RATE

- Morris County had an overall crime rate of 8.8 offenses per 1,000 residents and a violent crime rate of 0.6 per 1,000. The county saw 2 murders in 2015.
- Morris had the 2nd lowest crime rate in the State; only Hunterdon had a lower crime rate.
- A total of 4,375 Crime Index Offenses were reported to the police of Morris County during 2015, a 12 percent decrease compared to 2014.
- Violent crimes decreased 5 percent while the nonviolent crime category decreased 12 percent.
- The crime rate for Morris County was recorded at 8.8 victims for every 1,000 inhabitants, a decrease of 11 percent compared to the previous year.
- Murder decreased 60 percent from 5 in 2014 to 2 in 2015. Rape increased 19 percent from 26 in 2014 to 31 in 2015.
- Robbery increased 7 percent from 82 in 2014 to 88 in 2015. Burglary decreased 22 percent from 785 in 2014 to 613 in 2015.
- Aggravated assault decreased 12 percent from 192 in 2014 to 170 in 2015.
- The total value of property stolen in Morris County amounted to \$8,876,399 of which 30.1 percent was recovered.

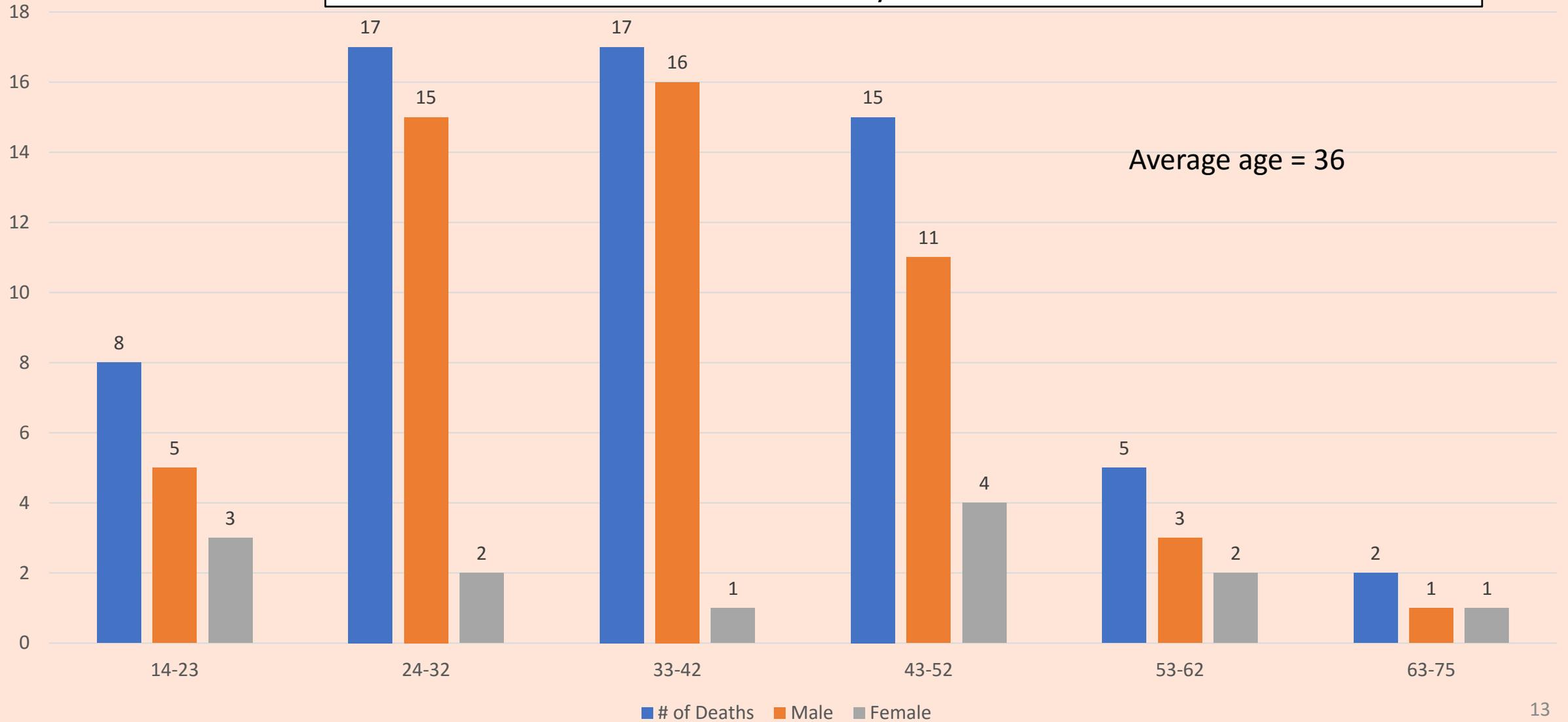
ARRESTS/CLEARANCES

- There were 10,440 persons arrested during 2015, a decrease of 1 percent compared to 2014.
- Adult arrests decreased less than one-half of one percent to 9,694 and juvenile arrests decreased 10 percent to 746 as compared to 2014.
- The total clearance rate for Index offenses was 28 percent; juveniles were responsible for 6 percent of those cases.

Lethal Overdoses By Month January 1, 2016 – September 11, 2017



2017 Lethal Overdoses (Jan. 1, 2017 – September 11, 2017)
by Sex and Age
Males – 51/Females - 13





Where Median Household Income is Highest and Lowest

Median Household Income

Median household income in Morris County is \$101,661, second highest in the state.

Municipality	Median Household Income
Harding	\$171,331
Mendham Twp.	\$170,160
Mountain Lakes	\$164,432
Chester Twp.	\$154,094
Chatham Twp.	\$151,216
Morristown	\$77,407
Wharton	\$66,579
Dover	\$60,822
Netcong	\$54,659
Victory Gardens	\$39,811

Source: U.S. Census Bureau, American Community Survey
2011 – 2015 ACS

United Way's "ALICE"

Asset Limited, Income Constrained, Employed

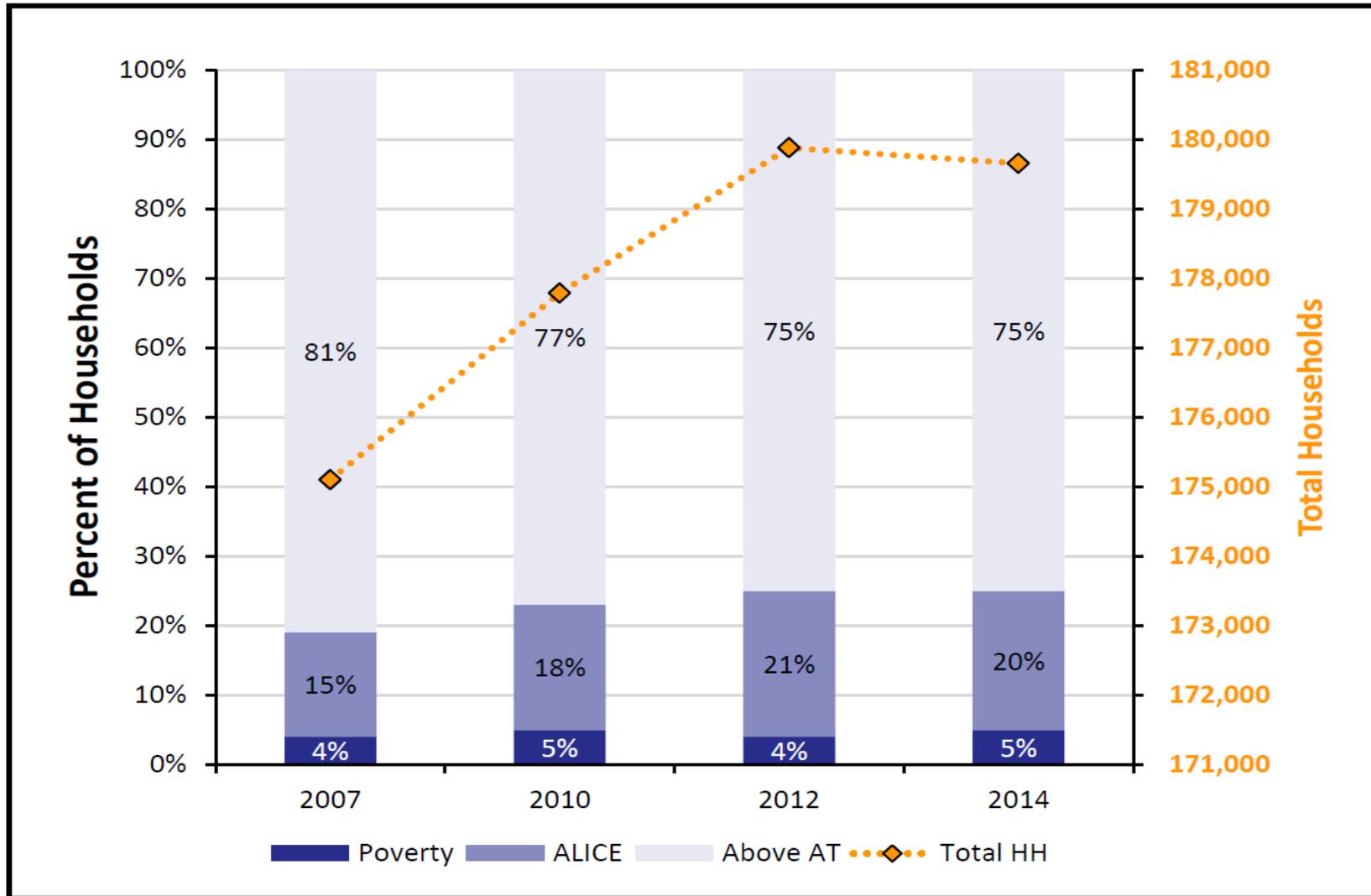
- **ALICE**, a United Way acronym which stands for **A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed, is a way of defining and understanding our families, neighbors, and colleagues (men and women) who work hard, earn above the federal poverty level, but not enough to afford a basic household budget of housing, child care, food, transportation, and health care.



Source: www.unitedwayalice.org

United Way's "ALICE" in Morris County

Asset Limited, Income Constrained, Employed



Source: United Way of Northern New Jersey

Benefit Recipients in Morris County *

- Supplemental Nutrition Assistance Program – 13,321 people
 - 8,297 adults and 5,024 children
 - Decrease of 9.3% from one year ago
- Work First NJ (WFNJ)/Temporary Assistance to Needy Families (TANF)
 - 123 families, and 37 child only cases
 - Recipient numbers down 31.7% from one year ago
 - Work activity participation rate = 19.5% (state average is 28.5%)
- WFNJ/General Assistance (GA) – 407 individuals
 - 141 employable and 266 unemployable
 - Overall number of recipients down 24.3% from one year ago

Also, 500k meals are provided annually to Morris County Senior Citizens, and the Co. DHS coordinates with non-profit and faith-based service providers to meet resident needs.

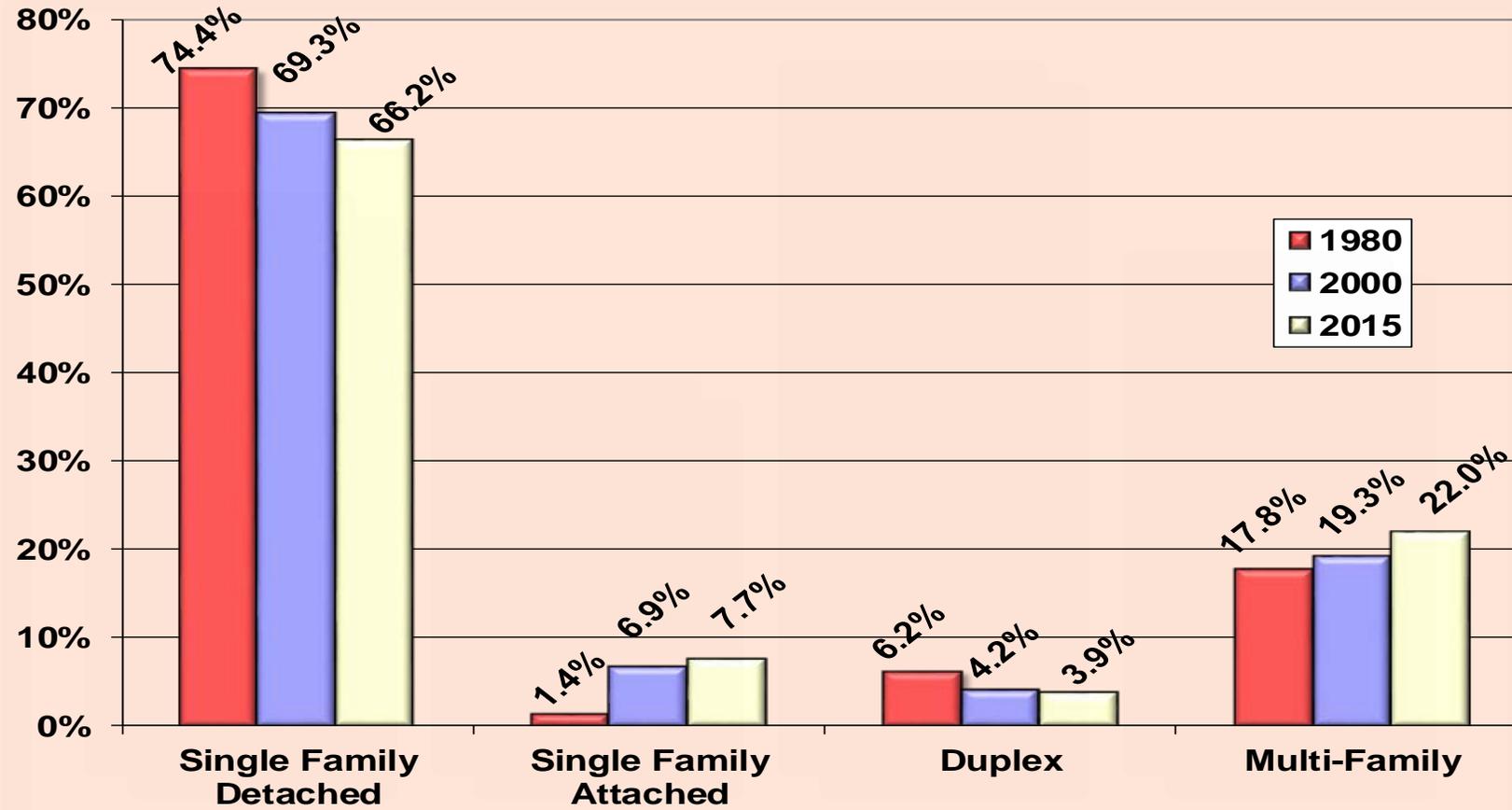
* Source: NJ Division of Family Development, Statistics for June, 2017

2016 Human Services Snapshot

- **Veterans Affairs**
 - Over 125 claims or intent to file claims were received
- **Aging Disabilities and Community Programming**
 - 2,796 calls for aging services
 - 3,643 at-risk seniors received assistance
- **Adult Protective Services**
 - 536 referrals and 84 investigations conducted
- **Morris Area Paratransit System**
 - 49,342 trips completed
- **Morris/Sussex/Warren Employment & Training Services**
 - Enrolled 890 dislocated workers into training programs
- **Community & Behavioral Health Services**
 - 930 requests received for mental health, addictions and youth services

The Housing Mix is Slowly Changing

Units in Residential Structures, 1980 - 2015



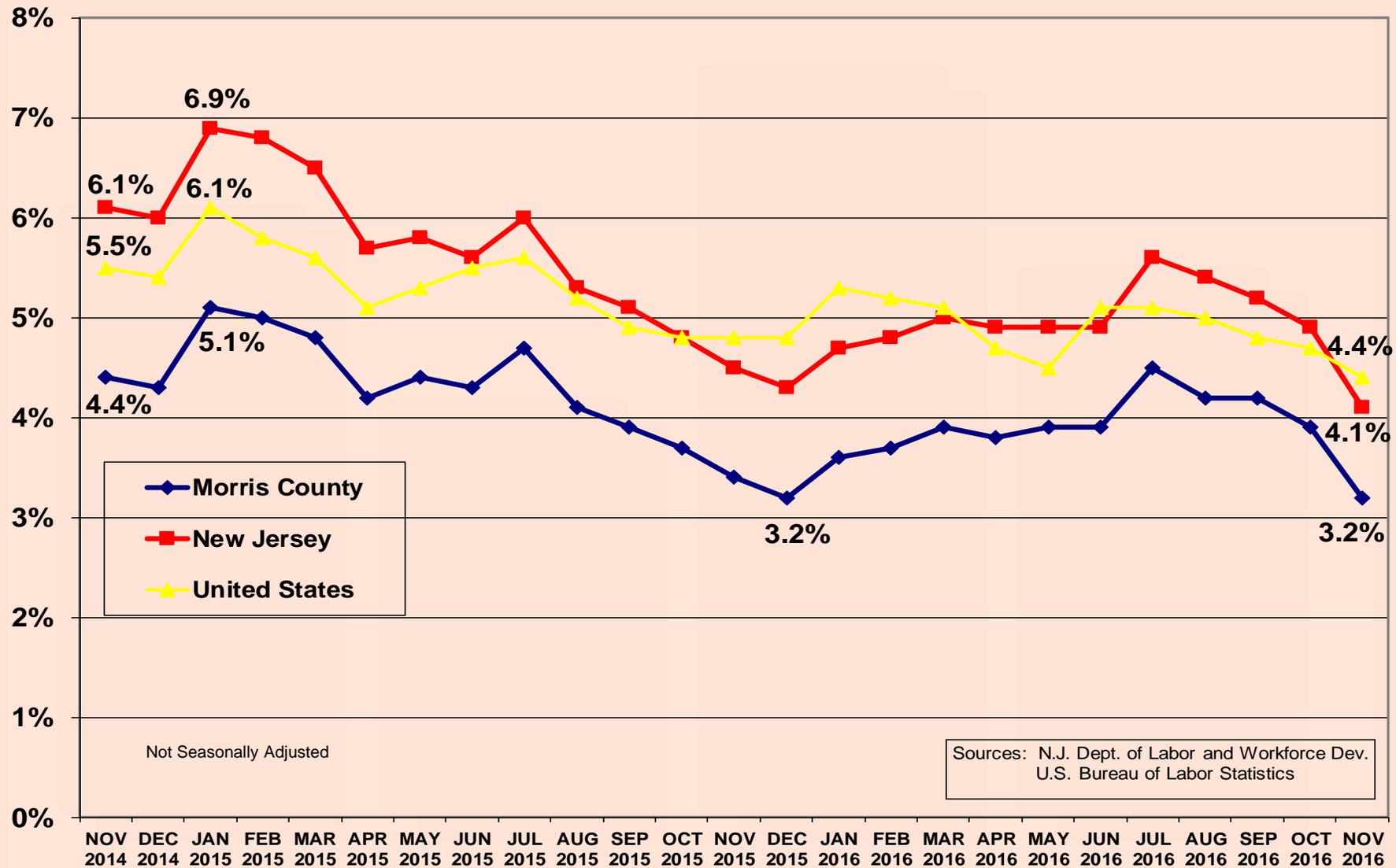
Note: Mobile Home, Boat, RV, Van, Etc. ranged from 0.2% to 0.3% during this period.

Source: U.S. Census Bureau, Decennial Census and American Community Survey



Unemployment is Comparatively Low

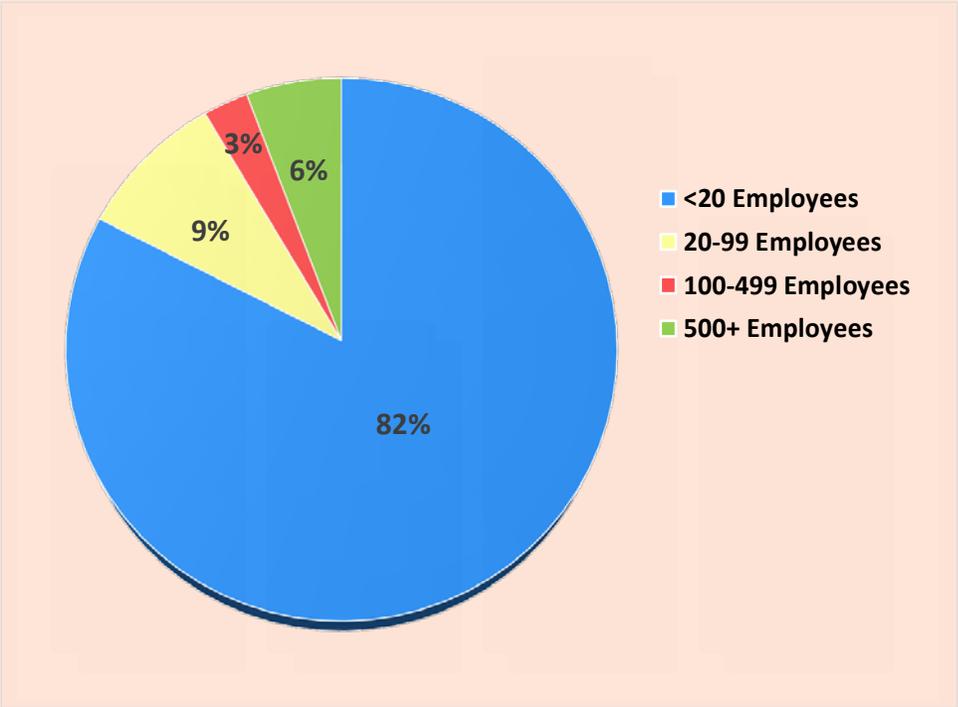
Unemployment Rate, November 2014 – November 2016



Employers in Morris County

The Majority of County Businesses Are Small Employers

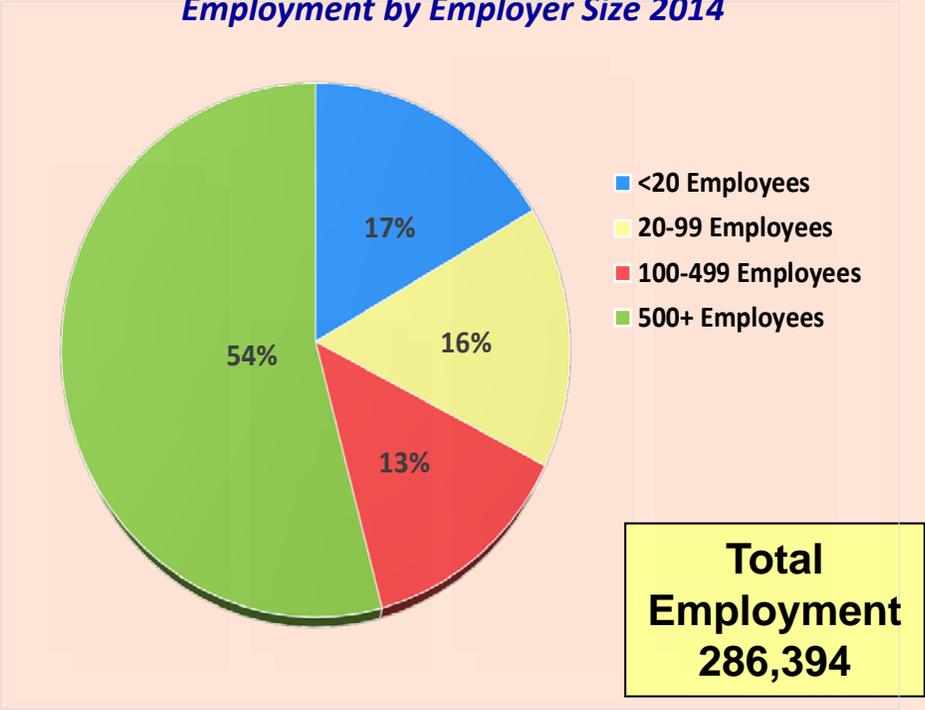
Firms by Employer Size 2014



**Total Firms
14,583**

The Majority of Employment is by Large Employers

Employment by Employer Size 2014

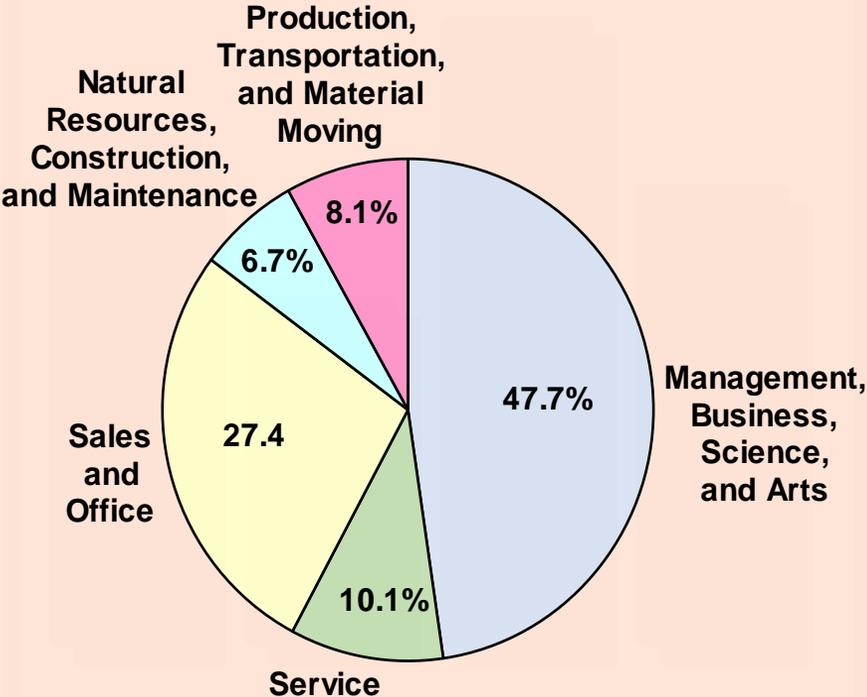


**Total
Employment
286,394**

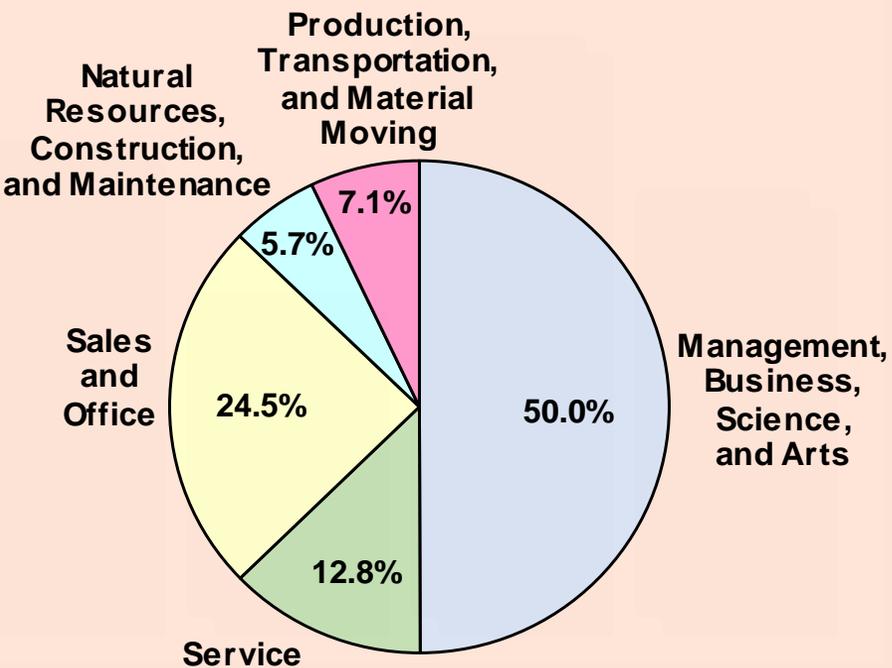
Employer size based on nationwide firm employment

Residents by Occupation

2000



2015

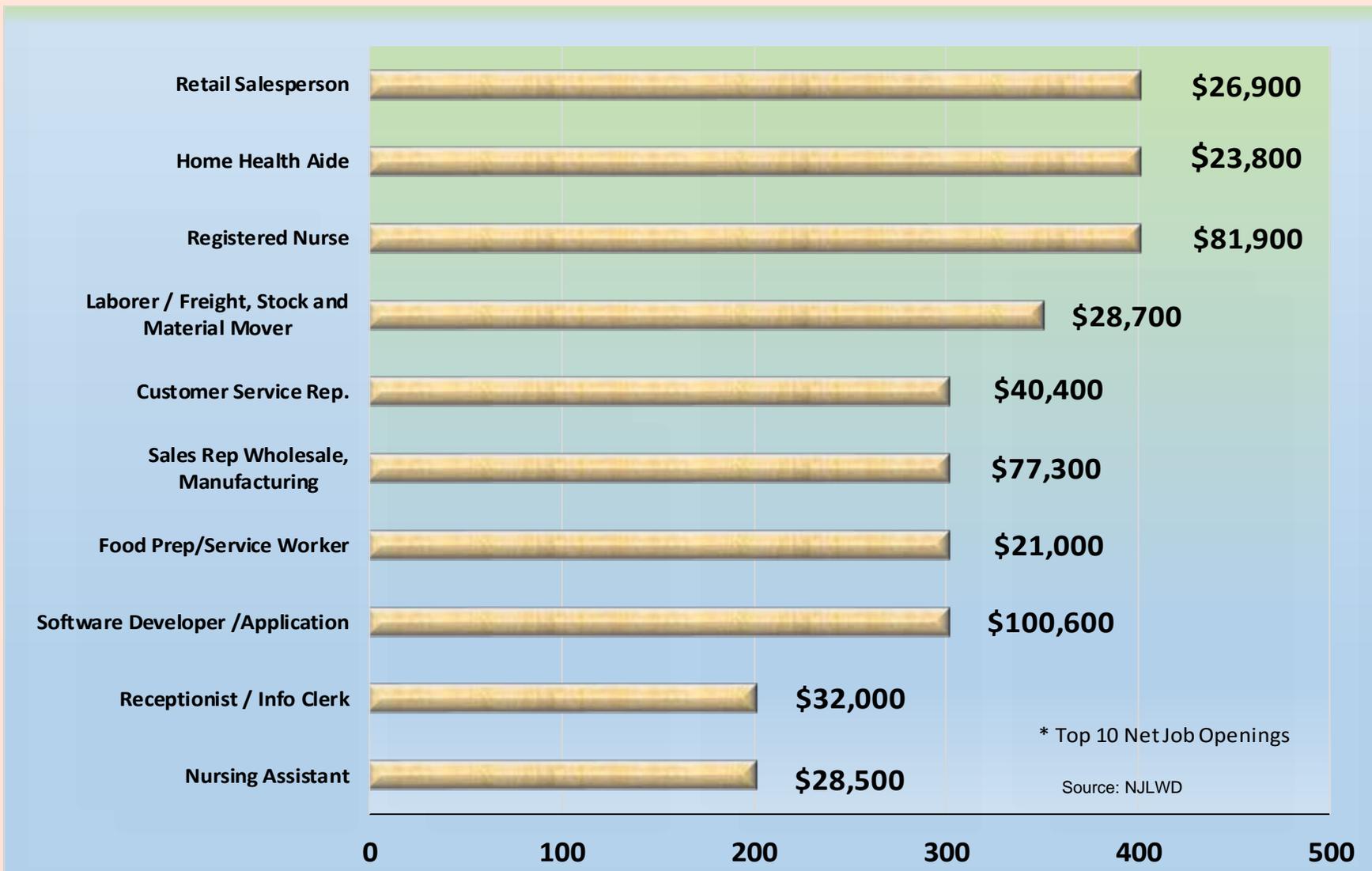


Source: U.S. Census Bureau, American Community Survey

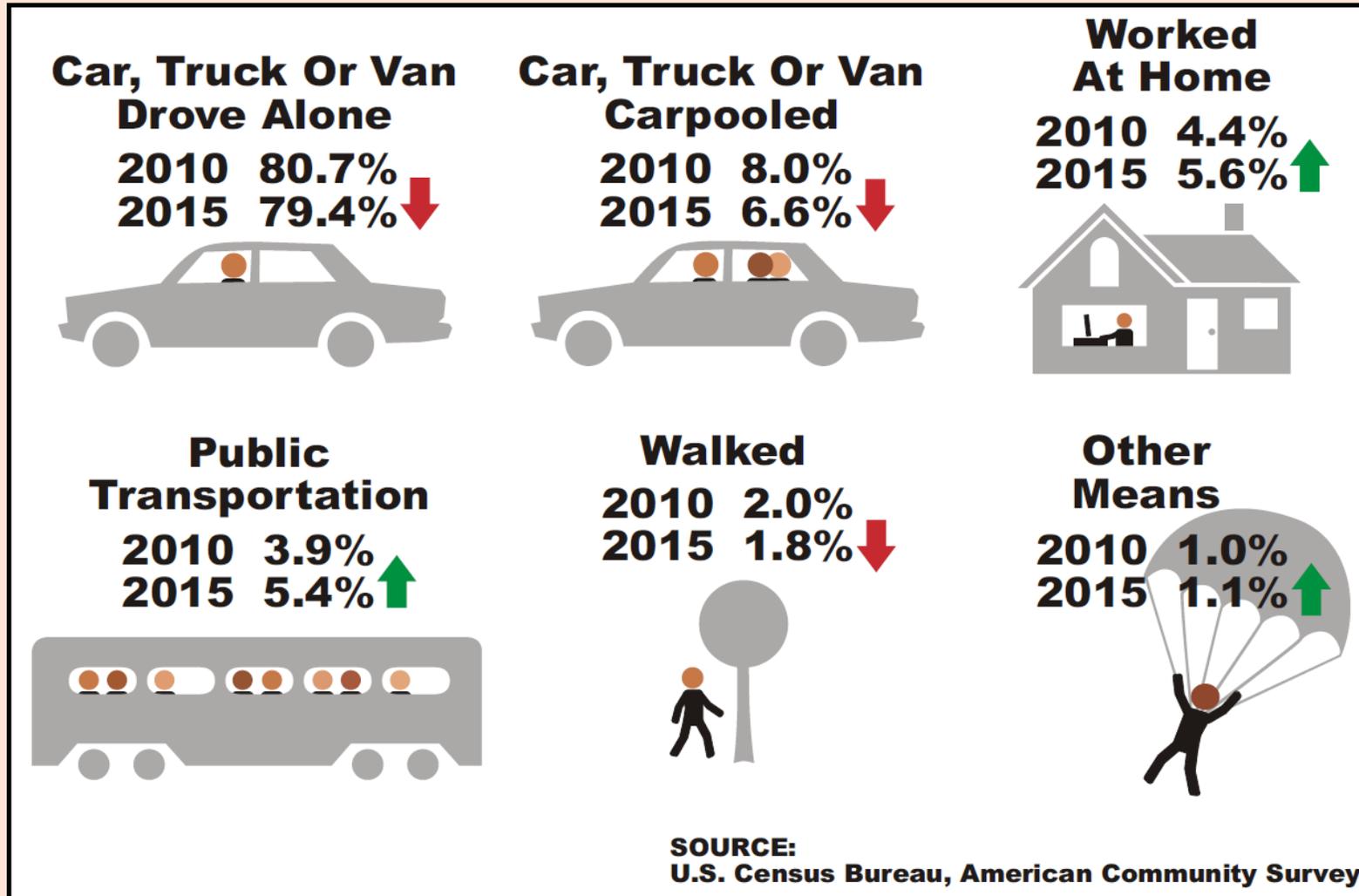


Much Anticipated Job Growth is in Lower Salary Occupations

Net New Jobs by Occupation (2014-2024)* and 2016 Average Salary



Transportation to Work



- 2,527 miles of roadway, 296 of which is maintained by the county.
- Rail stations throughout the county
- Morristown Municipal Airport in Hanover Twp.

Freight Railroads in Morris County

- Morris County is served by three freight railroad companies:
 - Morristown & Erie Railway
 - New York, Susquehanna, and Western Railway
 - Norfolk Southern Railway
- Morris County owns 3 railroads which are served and maintained under contract with the Morristown & Erie Railway:
 - Chester Branch
 - High Bridge Branch Railroad
 - Dover & Rockaway Railroad

Source: www.morriscountyedc.org

Businesses Gained/Lost by Industry in Morris County - 2016

NAICS	Description	2016 GRP	2010 Payrolled Business Locations	2016 Payrolled Business Locations	2017 Payrolled Business Locations	
11	Crop and Animal Production	\$28,340,996	48	40		-16.67%
21	Mining, Quarrying, and Oil and Gas Extraction	\$134,505,941	5	1		-80%
22	Utilities	\$283,294,819	26	27		3.85%
23	Construction	\$1,589,533,876	1,802	1,595		-11.49%
31	Manufacturing	\$6,811,627,190	655	592		-9.62%
42	Wholesale Trade	\$5,573,718,883	1,185	1,057		-10.80%
44	Retail Trade	\$2,397,667,924	1,934	1,761		-8.95%
48	Transportation and Warehousing	\$844,172,724	354	356		0.56%
51	Information	\$1,663,838,027	303	220		-27.39%
52	Finance and Insurance	\$5,823,280,114	1,056	958		-9.28%
53	Real Estate and Rental and Leasing	\$3,465,364,518	627	557		-11.16%
54	Professional, Scientific, and Technical Services	\$7,317,736,428	2,873	2,567		-10.65%
55	Management of Companies and Enterprises	\$2,498,401,859	94	113		20.21%
56	Administrative and Support and Waste Management and Remediation Services	\$2,151,613,149	1,268	1,242		-2.05%
61	Educational Services	\$480,285,557	277	302		9.03%
62	Health Care and Social Assistance	\$3,107,645,621	1,589	1,647		3.65%
71	Arts, Entertainment, and Recreation	\$650,899,636	246	275		11.79%
72	Accommodation and Food Services	\$1,310,837,578	1,207	1,222		1.24%
81	Other Services (except Public Administration)	\$681,812,970	1,752	1,712		-2.28%
90	Government	\$3,351,878,001	344	324		-5.81%
99	Unclassified Industry	Insf. Data	120	299		149.17%
		\$50,166,455,810	17,765	16,867		-5.05%

Value of Tourism In Morris County

- Revenues generated: \$2.1 Billion = 4.1 % of MC economy (top 10)
- Jobs created: 28,700 = 9.8 % of MC jobs (top 5)
- Local taxes collected: \$290 Million
- Hotel Occupancy tax: \$ 11.1 Million
- Residents tax savings: \$700/year
- National Statistics:
 - 1980–2016 - spending on tourism has increased by 200% vs. only 75% for other categories
 - 1998-2014 – Hospitality/Tourism outperformed all other industries in job growth – 10% vs -1%
 - 33% of new residents first visited as a tourist
 - 20% of executives attending a conference will book meetings in host city within 5 years
 - 27% of executives chose corporate HQ/Distribution sites based on previous business travel
 - For each 1% growth in tourism jobs, there is a 3% increase in overall job growth (iceberg effect)

Return on Investment of Tourism

Economically, the tourism industry has been a huge contributor of growth in the county. In 2016, tourism in Morris County accounted for \$2,131,000,000 in spending and was responsible for the employment of 21,992 employees.

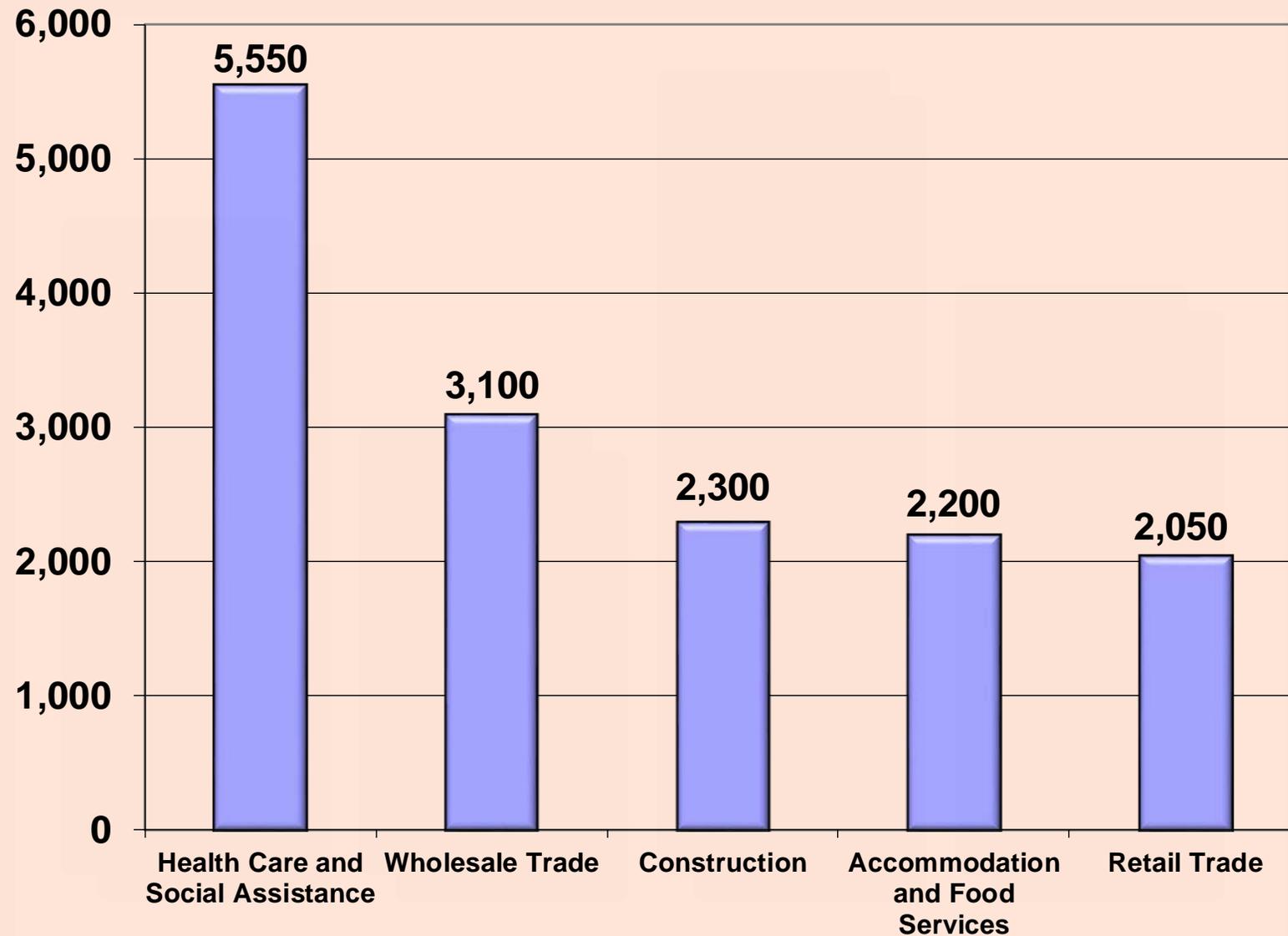
Return on Investment in Morris County tourism, last assessed in 2001, was 25:1

- Other ROI's range from 3:1 (Florida) to 1100:1 (Philadelphia)

Role of Heritage Tourism

- Nationally - on the rise, especially when linked to other activities, desire to see 'where we came from'
- Morris County – *[Dashboard Metrics – 2013-2016]*
 - Venue Attendance - **down** by 20–26% – e.g., Morristown National Park, Stickley Museum
 - Interactive Events - **up** by 56–88% - e.g., Walking Tours, Revolutionary Times
- Non-heritage growth area: Mayo Performing Arts Center – **up** by 42%
- Need to find out what is drawing people - heritage/traditional venues or cultural/events/recreation

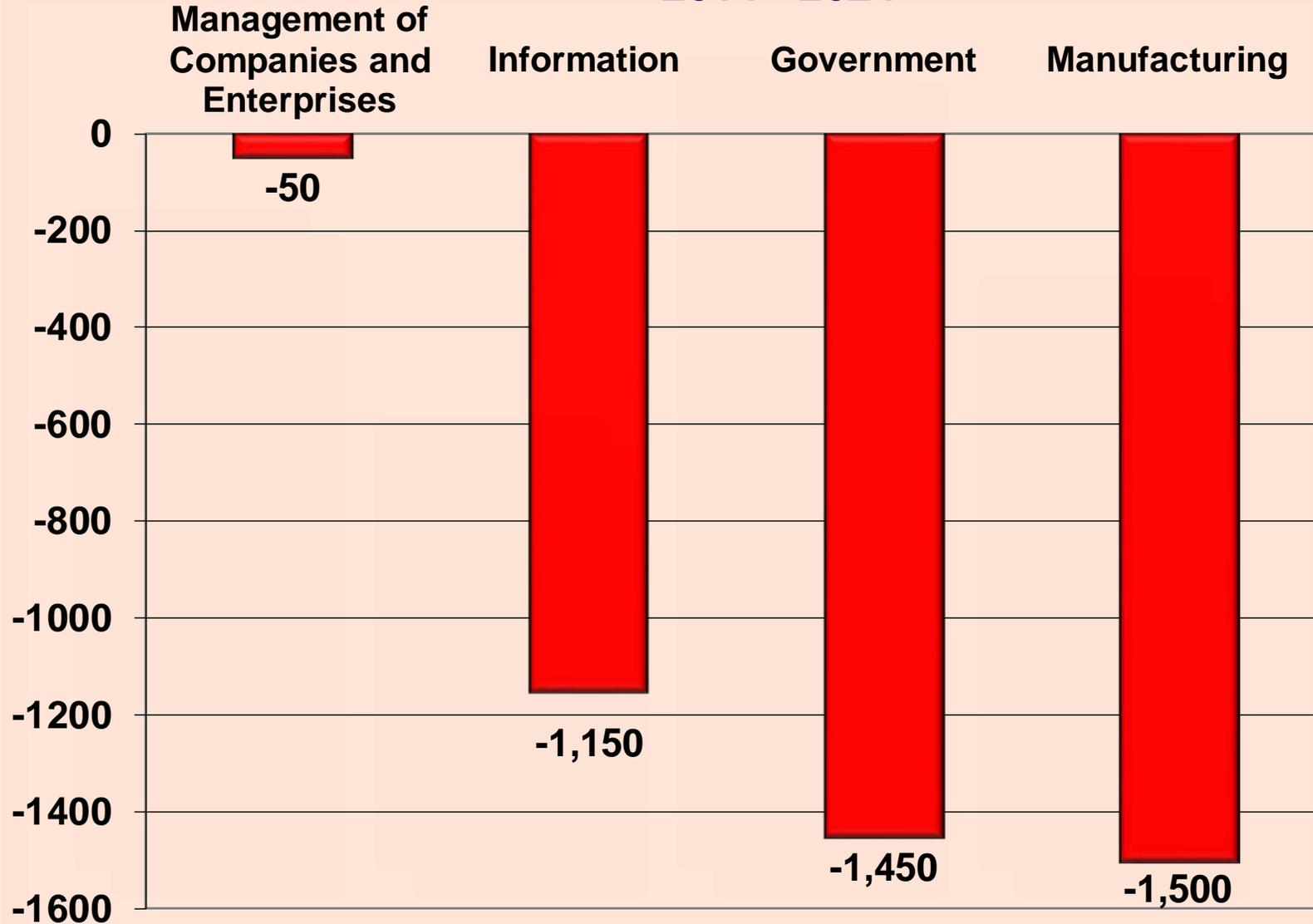
Top Growth Industries by Projected Employment Increase 2014 - 2024



Source: N.J. Dept. of Labor and Workforce Development

Industries Projected to Decline in Employment

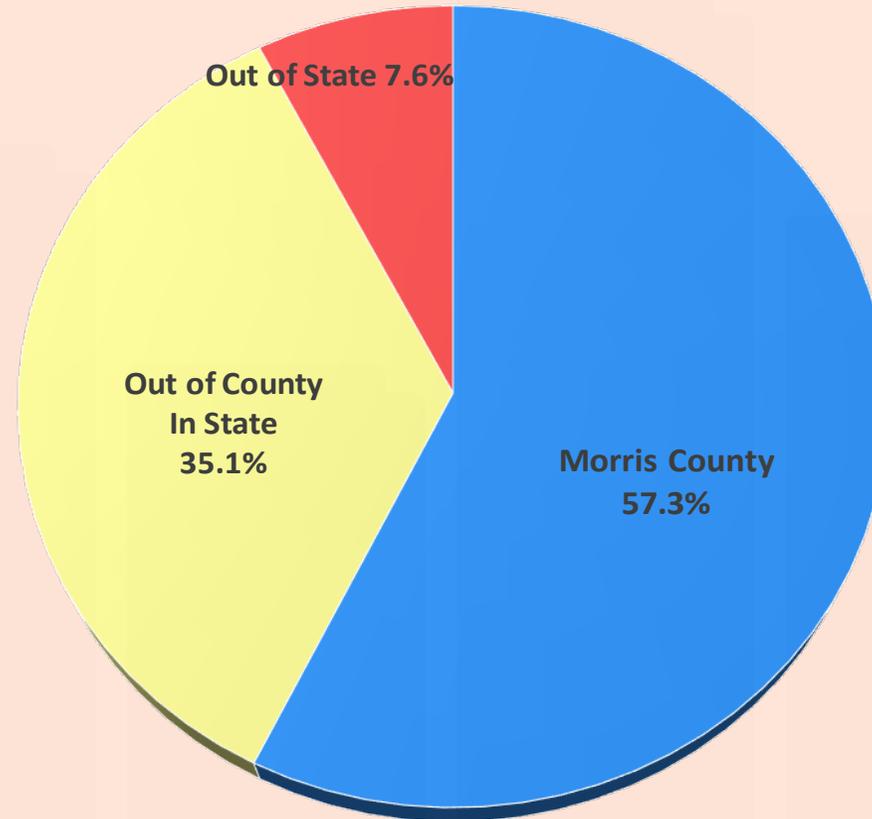
2014 - 2024



Source: N.J. Dept. of Labor and Workforce Development

A Majority of Residents Work in the County

51.4% of the County population has at least a Bachelor's degree



Resources in Morris County

- Morris County has 152 public schools in 43 districts, which include some of the highest rated districts and schools in the state.
- There are also 110 private schools, including a wide range of preschools and educational childcare programs as well as alternative, special education, preparatory, and religious schools.
- County College of Morris
- 3, 4 year private colleges – Fairleigh Dickinson Univ., Drew Univ., and College of St. Elizabeth
- County Vocational/Technical School
- 13,000 acres in 28 county parks
- 4 county owned golf courses
 - Flanders Valley Golf Course offers over 40 acres, with two 18-hole courses and scenic layouts and a challenging design.
 - Pinch Brook Golf Course is an 18-hole executive, par 65 course.
 - Berkshire Valley Golf Course consists of 528 acres and is an 18-hole, par 71 course. It presents a unique challenge and spectacular views.
 - Sunset Valley Golf Course, comprised of 18-holes, par 70, 6,483 yards of fairways and greens boasts the best three finishing holes in the state, according to many golf enthusiasts.

Libraries in Morris County

- There are 36 libraries located within Morris County. The MAIN (Morris Automated Information Network) consortium consists of 38 libraries; those located within Morris County plus the Hackettstown Library located in Warren County and the Bernards Township Library located in Somerset County.
- County Library, located at 30 East Hanover Ave, Whippany, NJ
- Annual circulation statistics at MCL (based on 2016 figures):
 - Over the counter (in person transactions; MCL material plus items requested from other libraries) = 306,487 items
 - Reciprocal borrowing (MCL items sent to other libraries) = 130,314 items
 - Libraries-by-mail (homebound patrons) = 4,034 items
 - GATE COUNT (bodies through our doors) = 166,554 patrons

More Resources ... Adding to the Quality of Life

- Home to more than 200 arts and history organizations, 137 heritage sites, and a variety of shopping and entertainment destinations, Morris County had more than 1575 visitors from 29 different states enter the visitors center.
- Morris County is home to four important National Historic Landmarks.
 - The Gustav Stickley homestead
 - The Morristown National Historical Park
 - Thomas Nast home
 - Factory building at Historic Speedwell where the telegraph was demonstrated successfully for the first time.

Source: www.morriscountyedc.org