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
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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

<table>
<thead>
<tr>
<th></th>
<th>Vital Events</th>
<th>Net Migration</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Population Change</td>
<td>Natural Increase</td>
</tr>
<tr>
<td>Morris County</td>
<td>7,230</td>
<td>5,428</td>
</tr>
<tr>
<td>New Jersey</td>
<td>166,077</td>
<td>173,618</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Race / Hispanic Origin</th>
<th>2010</th>
<th>2015 Census</th>
<th>2034 NJDLWD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Hispanic or Latino</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>White</td>
<td>75.1%</td>
<td>71.9%</td>
<td>63.7%</td>
</tr>
<tr>
<td>Black or African American</td>
<td>2.9%</td>
<td>3.1%</td>
<td>3.4%</td>
</tr>
<tr>
<td>Asian</td>
<td>8.9%</td>
<td>10.1%</td>
<td>14.0%</td>
</tr>
<tr>
<td>Other</td>
<td>0.3%</td>
<td>0.1%</td>
<td>0.1%</td>
</tr>
<tr>
<td>Two or more races</td>
<td>1.4%</td>
<td>1.8%</td>
<td>2.4%</td>
</tr>
<tr>
<td>Hispanic or Latino</td>
<td>11.5%</td>
<td>13.0%</td>
<td>16.5%</td>
</tr>
</tbody>
</table>

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

Source: U.S. Census Bureau, Decennial Census
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.

64% increase between 1/1/16-9/11/16 (39 deaths) and 1/1/16-9-11-17 (64 deaths)
2017 Lethal Overdoses (Jan. 1, 2017 – September 11, 2017) by Sex and Age
Males – 51/Females - 13

Average age = 36
**Where Median Household Income is Highest and Lowest**

Median Household Income

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

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

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 **Asset Limited, Income Constrained, Employed**, 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

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

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

Unemployment Rate, November 2014 – November 2016

Morris County
New Jersey
United States

Sources: N.J. Dept. of Labor and Workforce Dev.
U.S. Bureau of Labor Statistics

Not Seasonally Adjusted

[Graph showing unemployment rates for Morris County, New Jersey, and the United States from November 2014 to November 2016]
Employers in Morris County

The Majority of County Businesses Are Small Employers

Firms by Employer Size 2014

- <20 Employees: 3%
- 20-99 Employees: 9%
- 100-499 Employees: 6%
- 500+ Employees: 17%

Total Firms: 14,583

The Majority of Employment is by Large Employers

Employment by Employer Size 2014

- <20 Employees: 17%
- 20-99 Employees: 16%
- 100-499 Employees: 13%
- 500+ Employees: 54%

Total Employment: 286,394

Employer size based on nationwide firm employment

Source: U.S. Census Bureau, County Business Patterns
Residents by Occupation

### 2000

- Management, Business, Science, and Arts: 47.7%
- Natural Resources, Construction, and Maintenance: 10.1%
- Production, Transportation, and Material Moving: 8.1%
- Service: 27.4%
- Sales and Office: 6.7%

### 2015

- Management, Business, Science, and Arts: 50.0%
- Natural Resources, Construction, and Maintenance: 12.8%
- Production, Transportation, and Material Moving: 7.1%
- Service: 24.5%
- Sales and Office: 5.7%

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

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Net New Jobs</th>
<th>2016 Average Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail Salesperson</td>
<td></td>
<td>$26,900</td>
</tr>
<tr>
<td>Home Health Aide</td>
<td></td>
<td>$23,800</td>
</tr>
<tr>
<td>Registered Nurse</td>
<td></td>
<td>$81,900</td>
</tr>
<tr>
<td>Laborer / Freight, Stock and Material Mover</td>
<td></td>
<td>$28,700</td>
</tr>
<tr>
<td>Customer Service Rep.</td>
<td></td>
<td>$40,400</td>
</tr>
<tr>
<td>Sales Rep Wholesale, Manufacturing</td>
<td></td>
<td>$77,300</td>
</tr>
<tr>
<td>Food Prep/Service Worker</td>
<td></td>
<td>$21,000</td>
</tr>
<tr>
<td>Software Developer /Application</td>
<td></td>
<td>$100,600</td>
</tr>
<tr>
<td>Receptionist / Info Clerk</td>
<td></td>
<td>$32,000</td>
</tr>
<tr>
<td>Nursing Assistant</td>
<td></td>
<td>$28,500</td>
</tr>
</tbody>
</table>

* Top 10 Net Job Openings

Source: NJLWD
Transportation to Work

- Car, Truck Or Van Drove Alone
  - 2010: 80.7%
  - 2015: 79.4%
- Car, Truck Or Van Carpooled
  - 2010: 8.0%
  - 2015: 6.6%
- Public Transportation
  - 2010: 3.9%
  - 2015: 5.4%
- Worked At Home
  - 2010: 4.4%
  - 2015: 5.6%
- Walked
  - 2010: 2.0%
  - 2015: 1.8%
- Other Means
  - 2010: 1.0%
  - 2015: 1.1%

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

- 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

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

$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)
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

- Health Care and Social Assistance: 5,550
- Wholesale Trade: 3,100
- Construction: 2,300
- Accommodation and Food Services: 2,200
- Retail Trade: 2,050

Source: N.J. Dept. of Labor and Workforce Development
Industries Projected to Decline in Employment

2014 - 2024

Management of Companies and Enterprises

Information

Government

Manufacturing

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

Source: U.S. Census Bureau, American Community Survey 2009 – 2013 ACS
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