

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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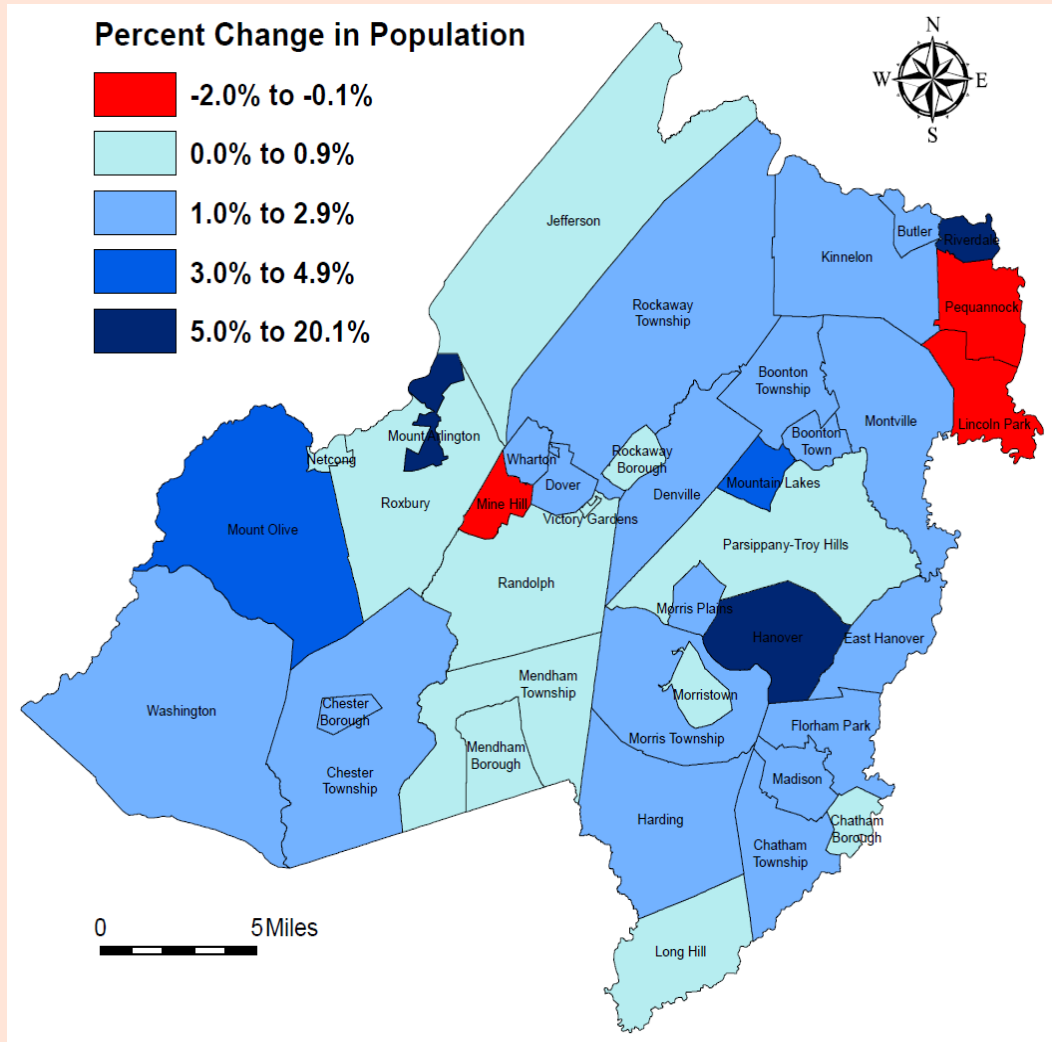
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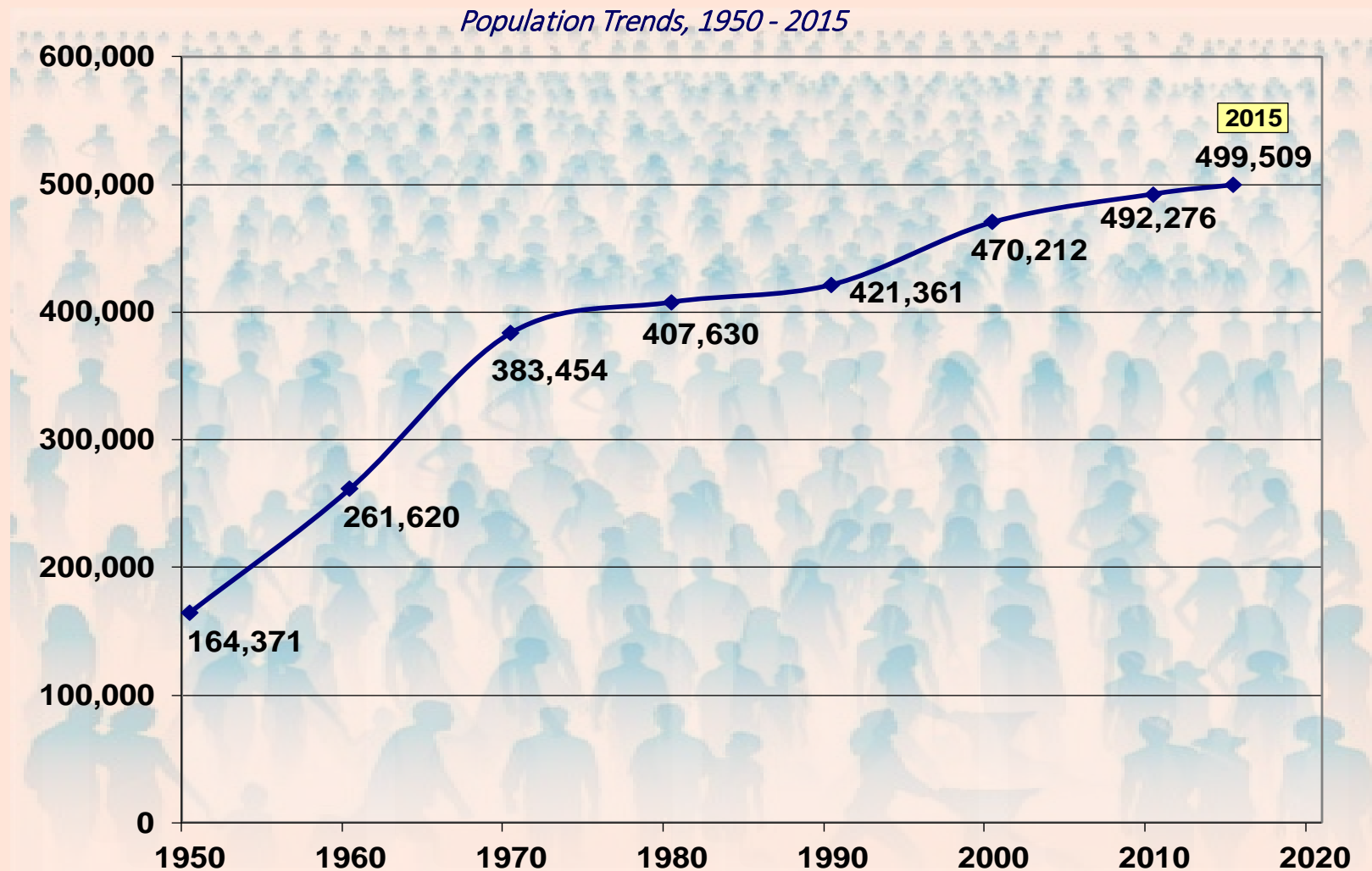
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County Snapshot

- 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

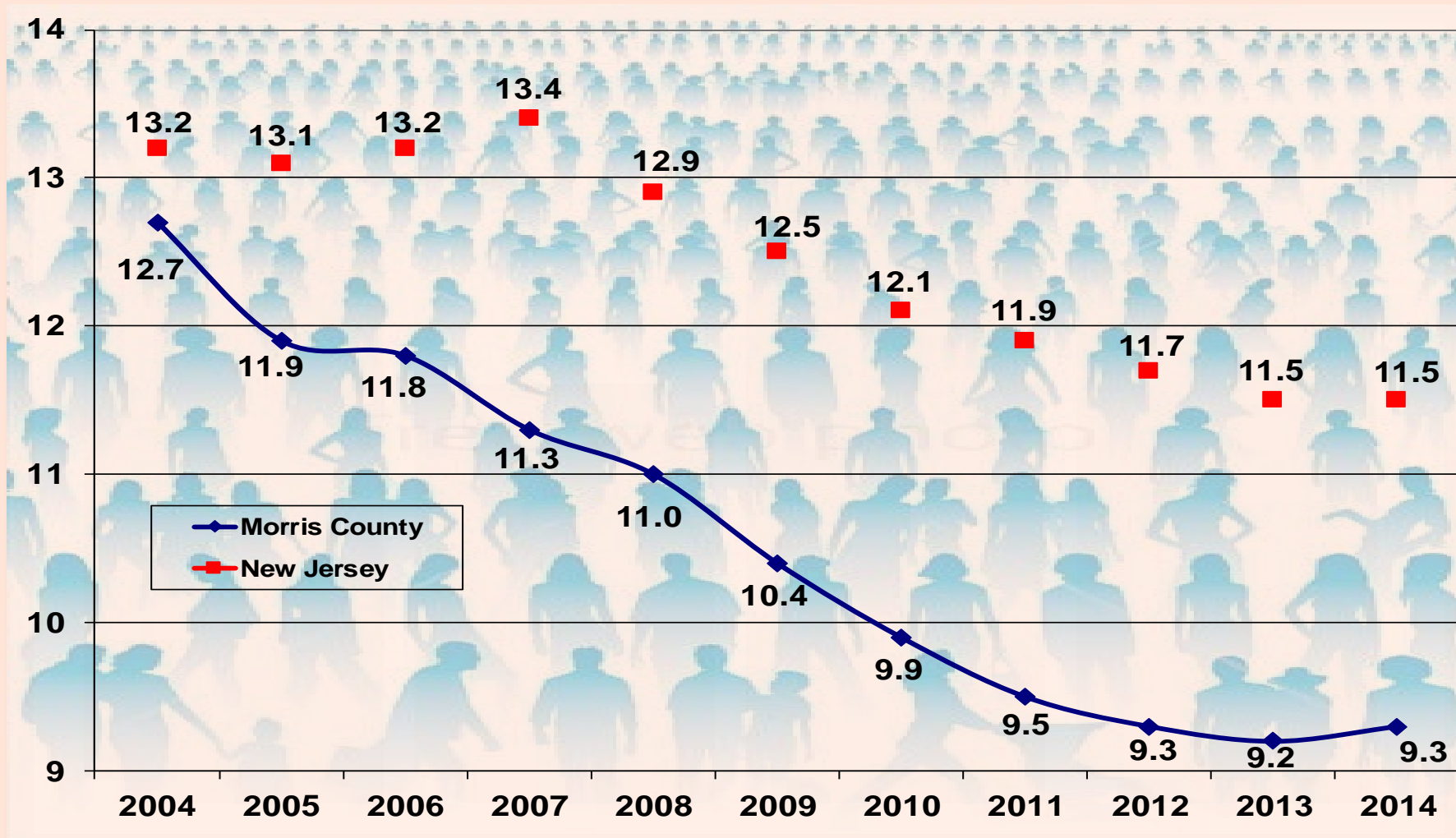


Source: U.S. Census Bureau,
Decennial Census and
Population Estimates Program



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

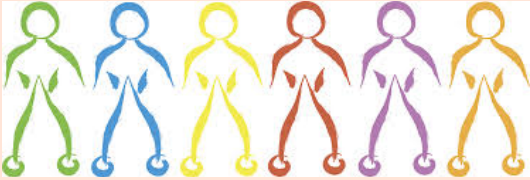
			Vital Events		Net Migration		
	Population Change	Natural Increase	Births	Deaths	Total	International	Domestic
Morris County	7,230	5,428	24,706	19,278	2,589	11,733	-9144
New Jersey	166,077	173,618	546,887	373,269	1,112	270,306	-269,194

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



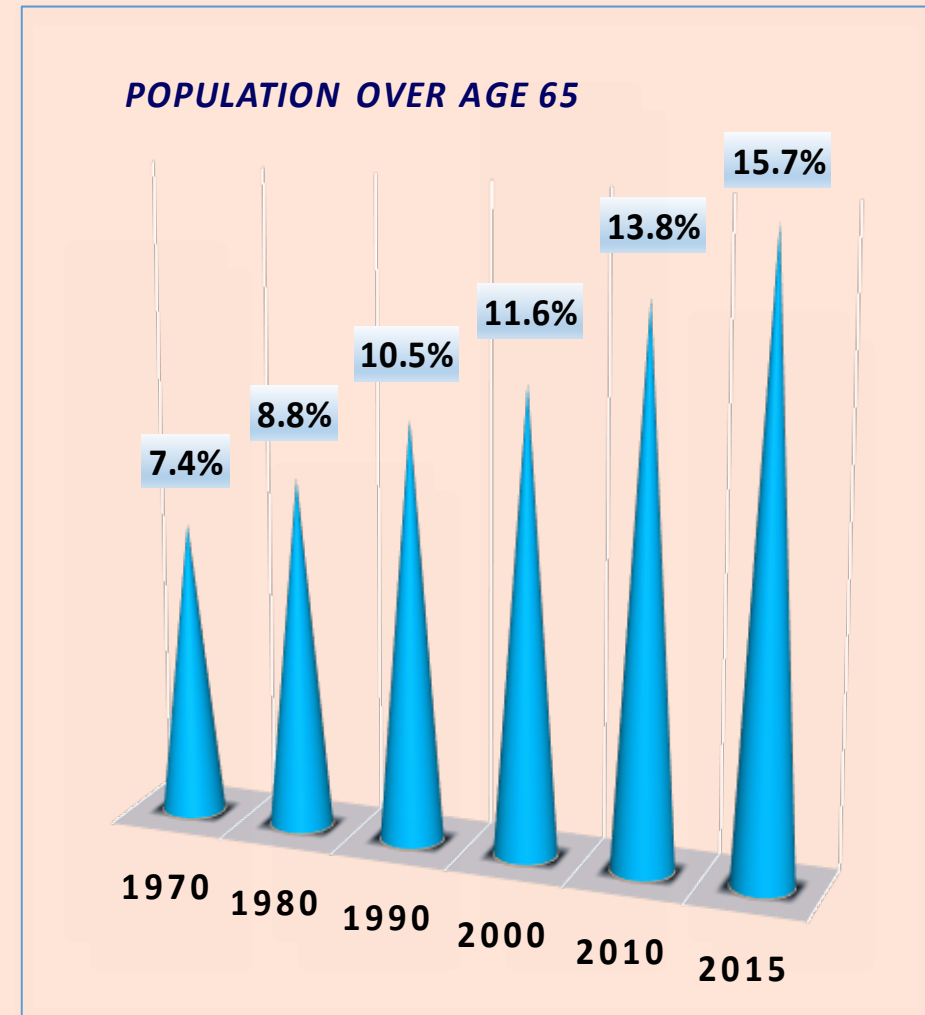
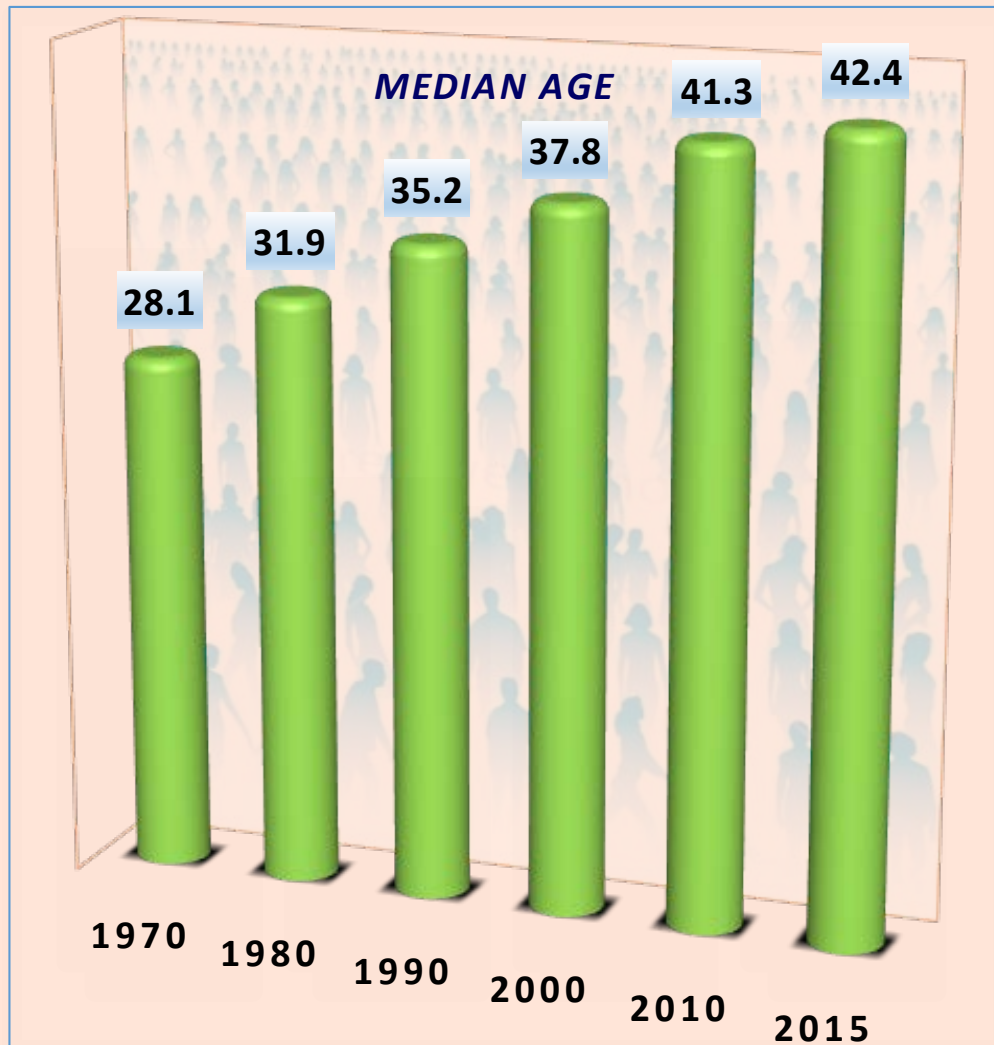
Morris County Population is Becoming More Diverse

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%



The Population is Getting Older

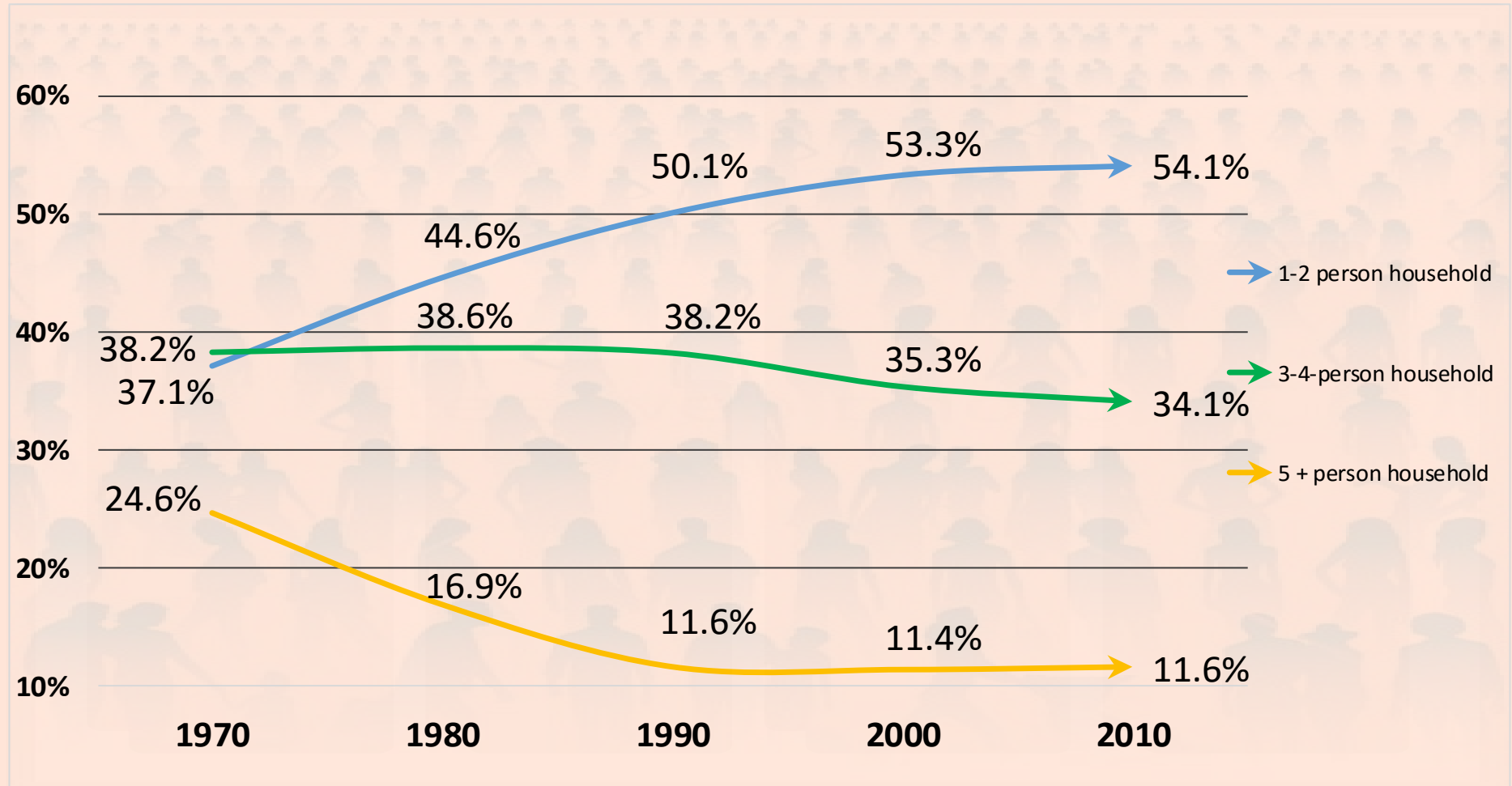


Source: U.S. Census Bureau, Decennial Census and American Community Survey



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

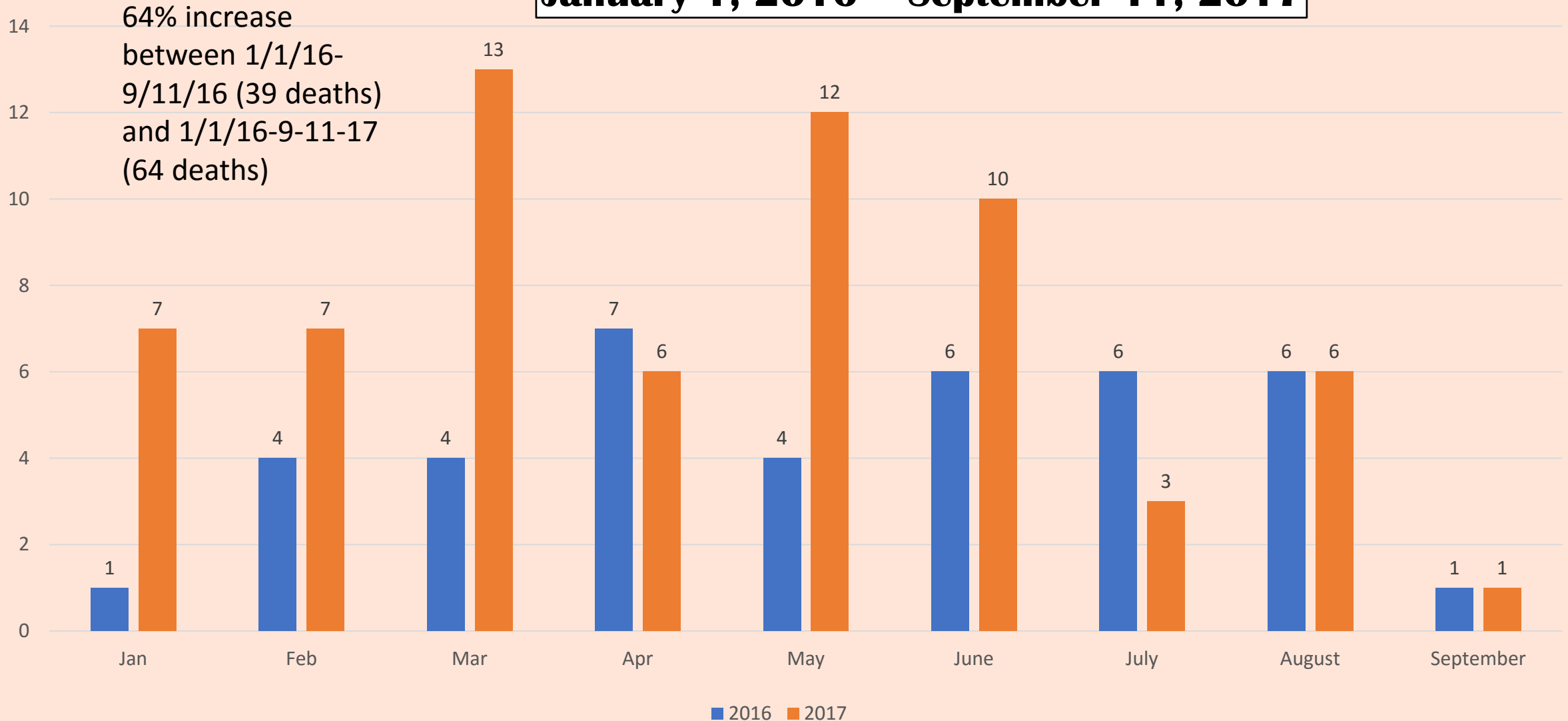
VOLUME/RATE

- 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.

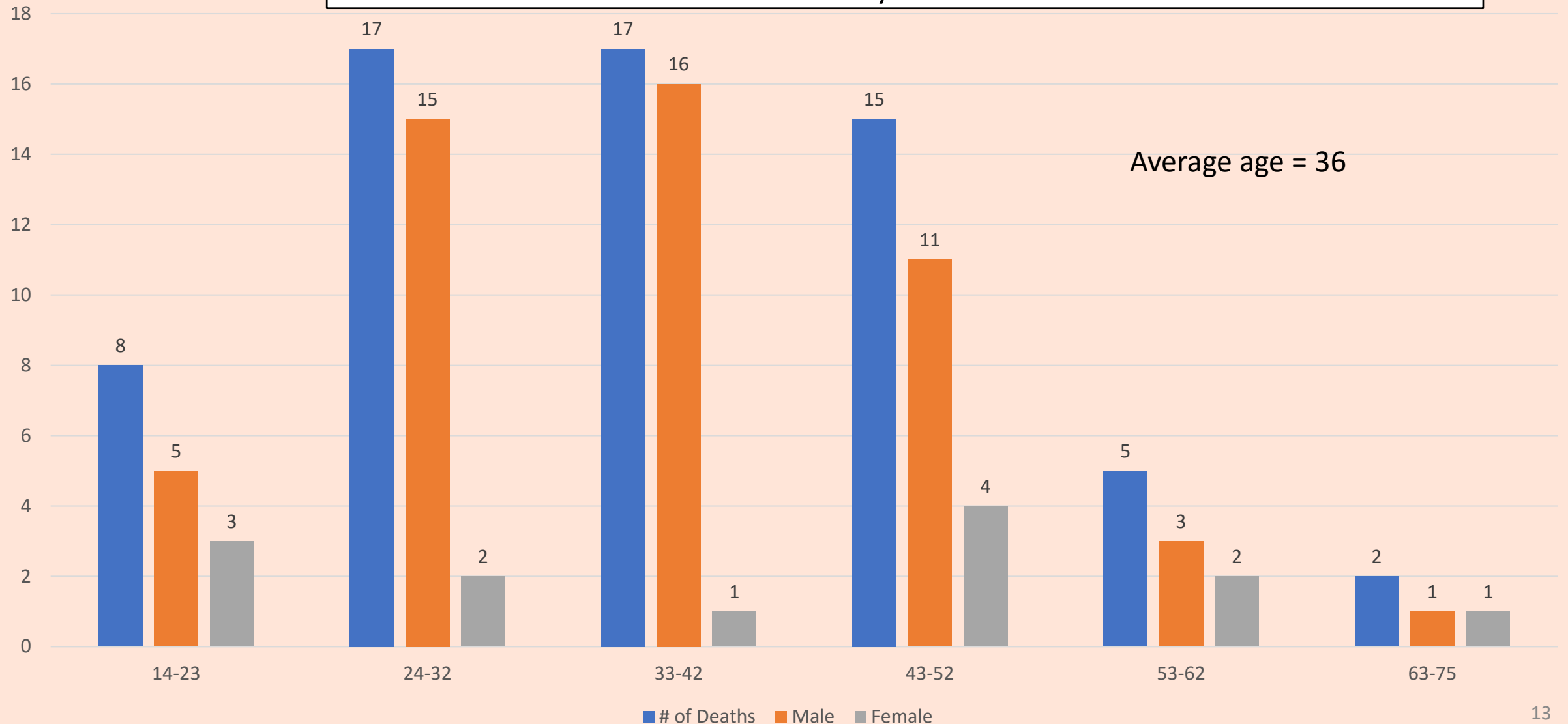
ARRESTS/CLEARANCES

- 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.

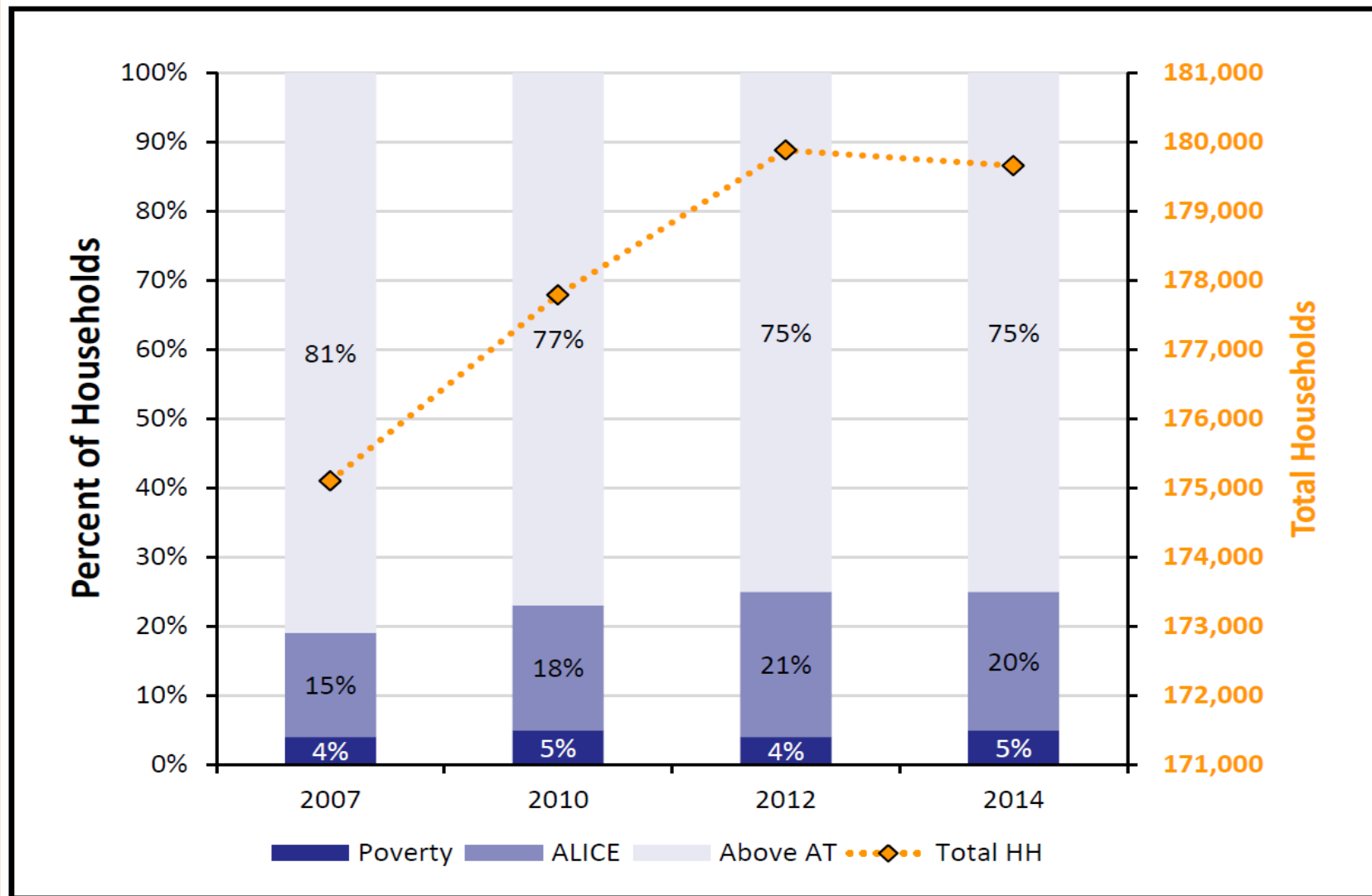


Source: www.unitedwayalice.org



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.

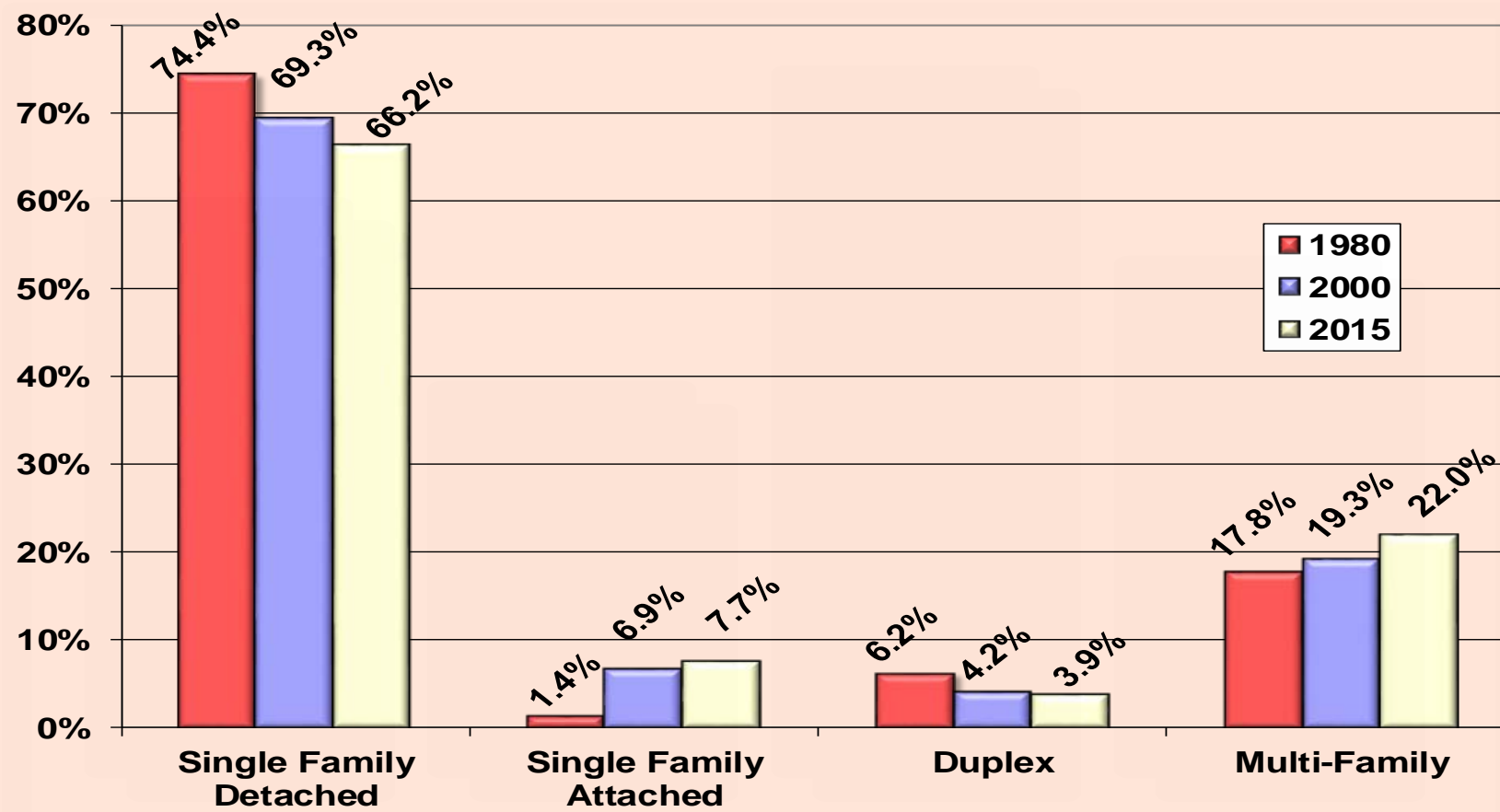
* Source: NJ Division of Family Development, Statistics for June, 2017

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



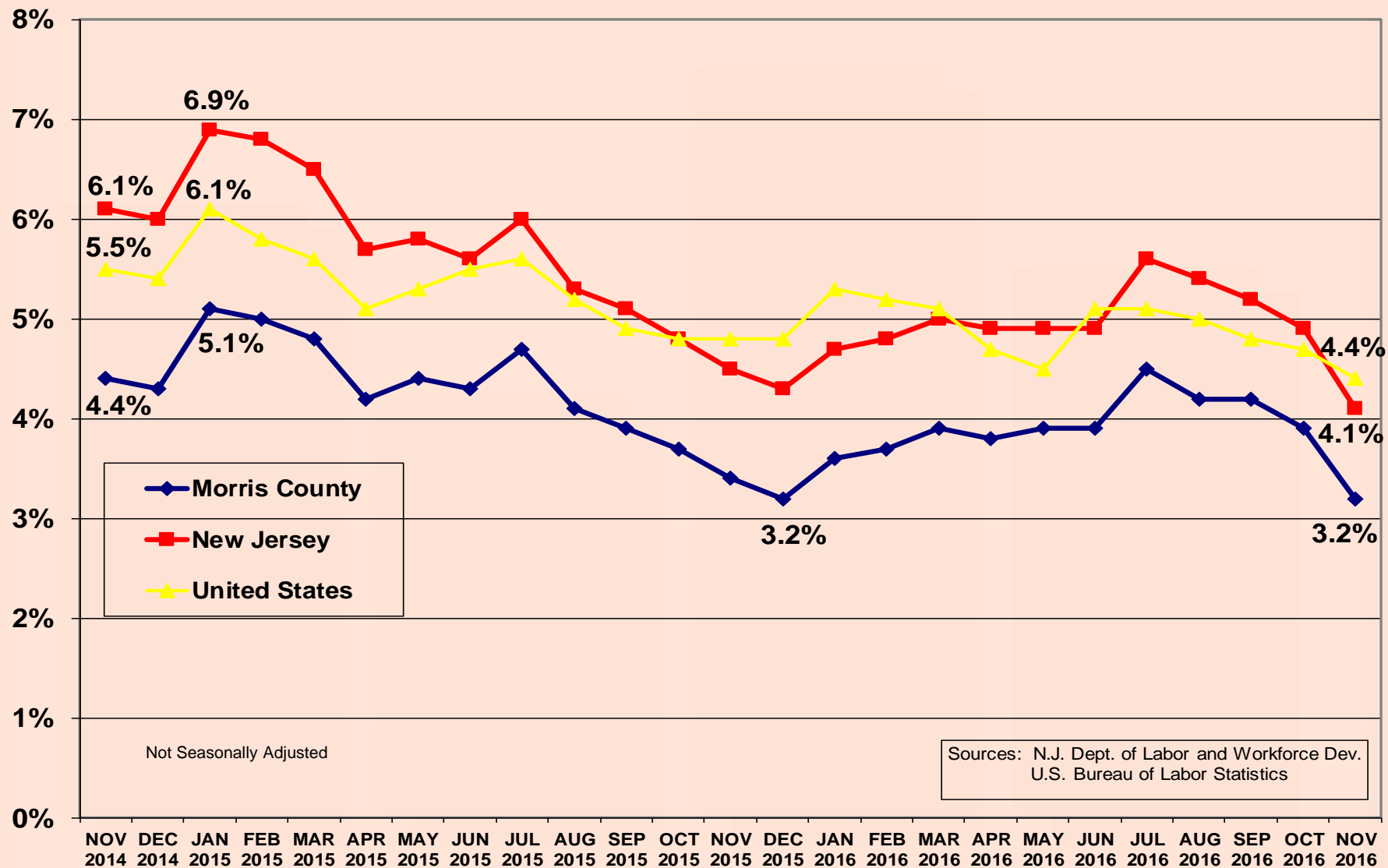
Note: Mobile Home, Boat, RV, Van, Etc. ranged from 0.2% to 0.3% during this period.

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



Unemployment is Comparatively Low

Unemployment Rate, November 2014 – November 2016

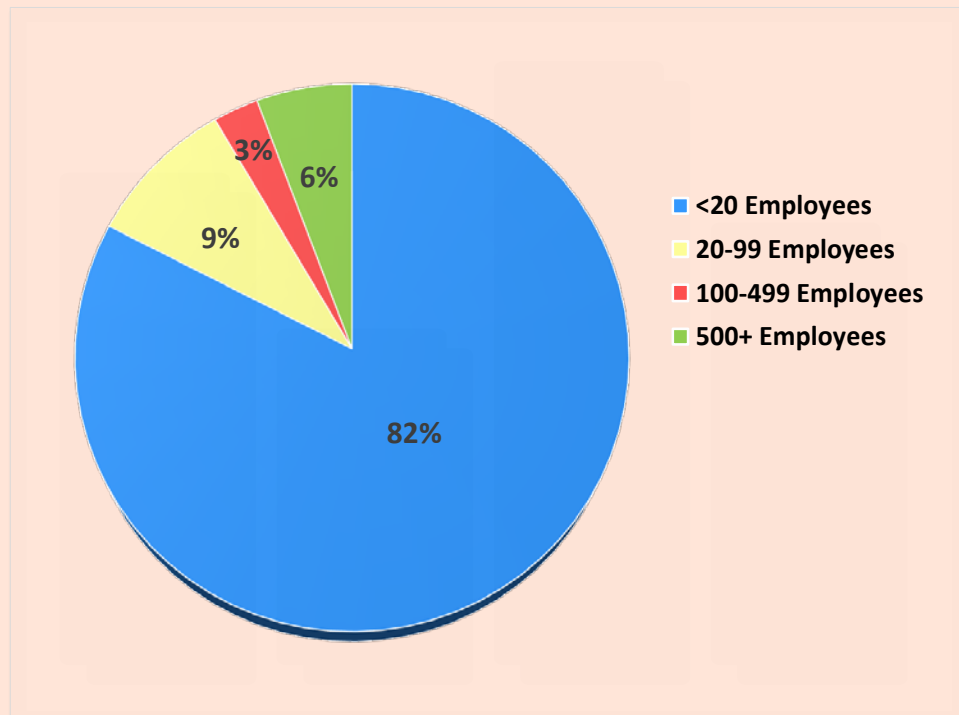




Employers in Morris County

The Majority of County Businesses Are Small Employers

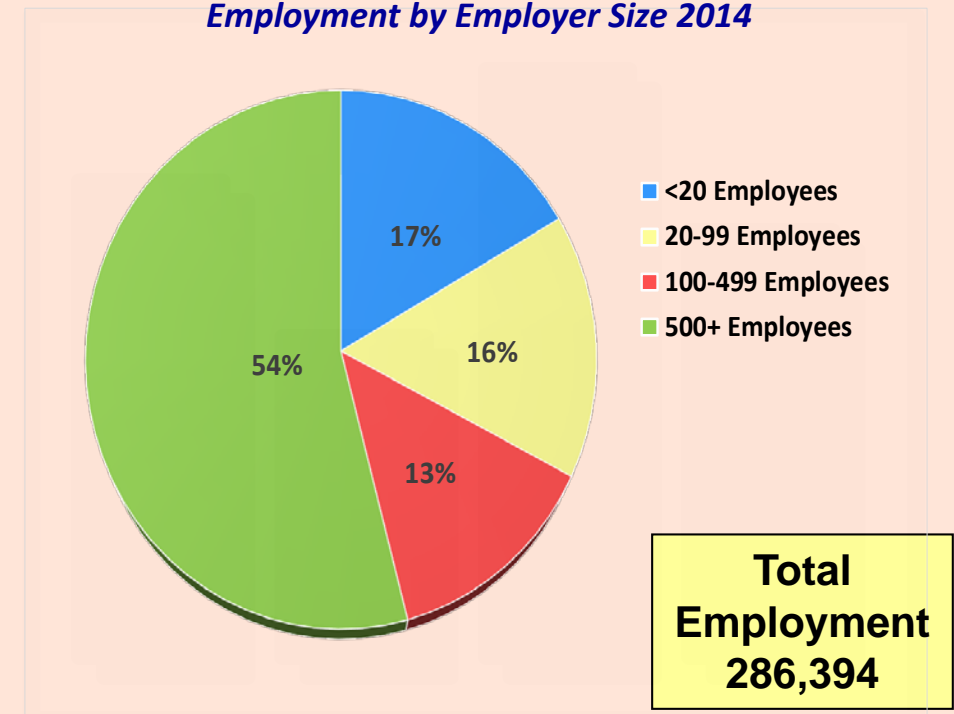
Firms by Employer Size 2014



**Total Firms
14,583**

The Majority of Employment is by Large Employers

Employment by Employer Size 2014

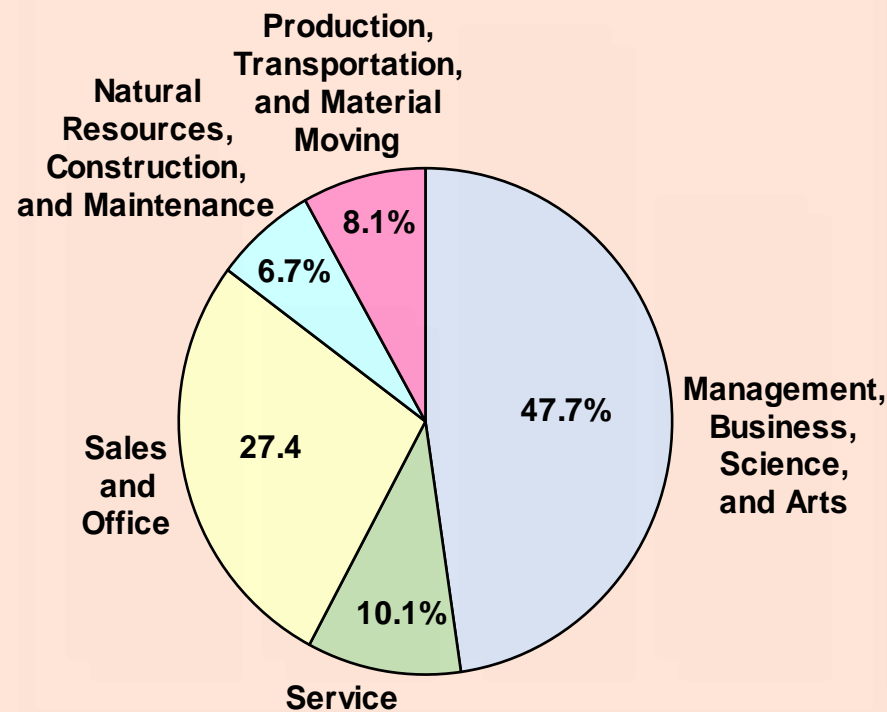


**Total
Employment
286,394**

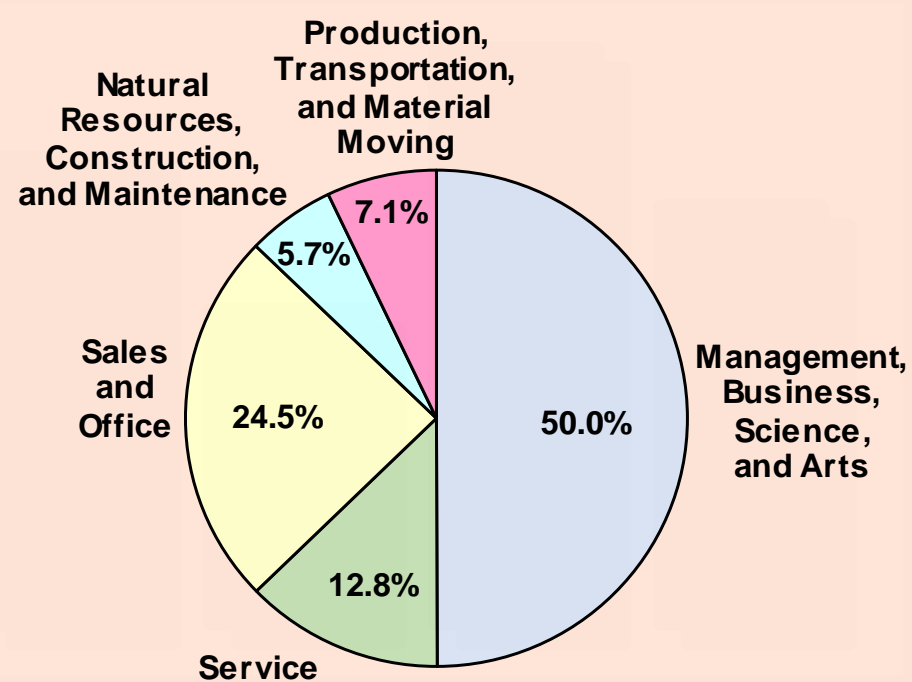
Employer size based on nationwide firm employment

Residents by Occupation

2000



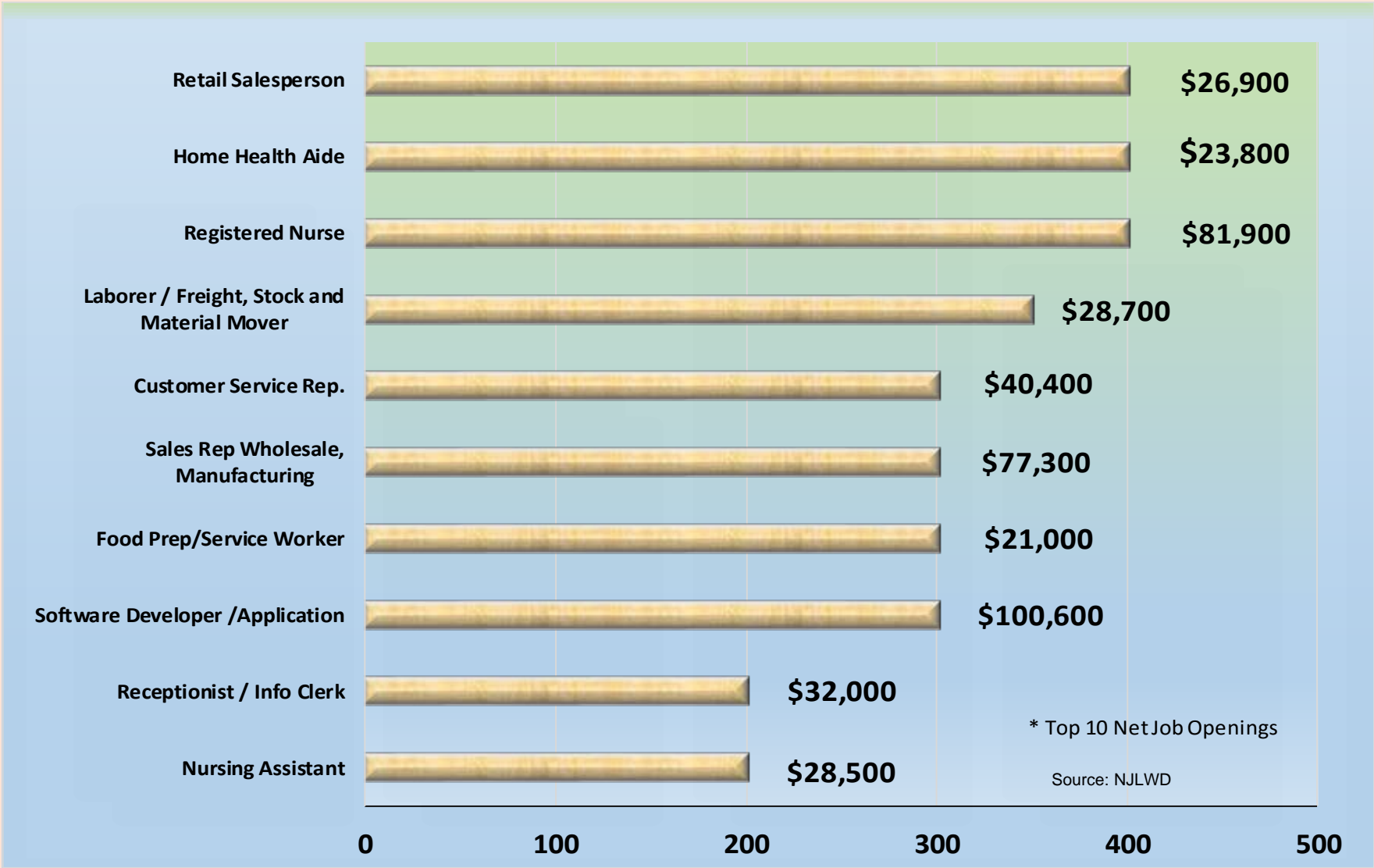
2015



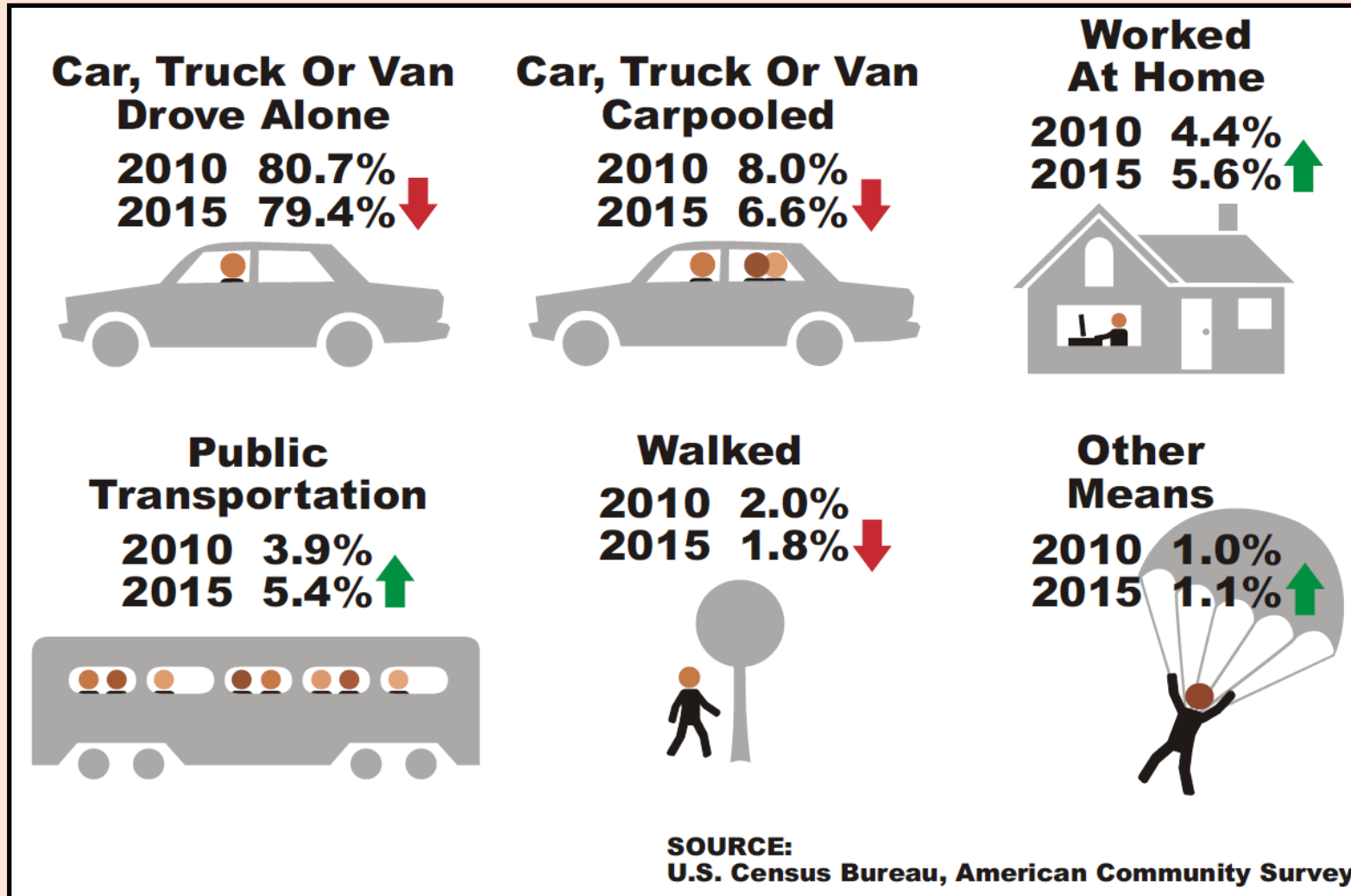


Much Anticipated Job Growth is in Lower Salary Occupations

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

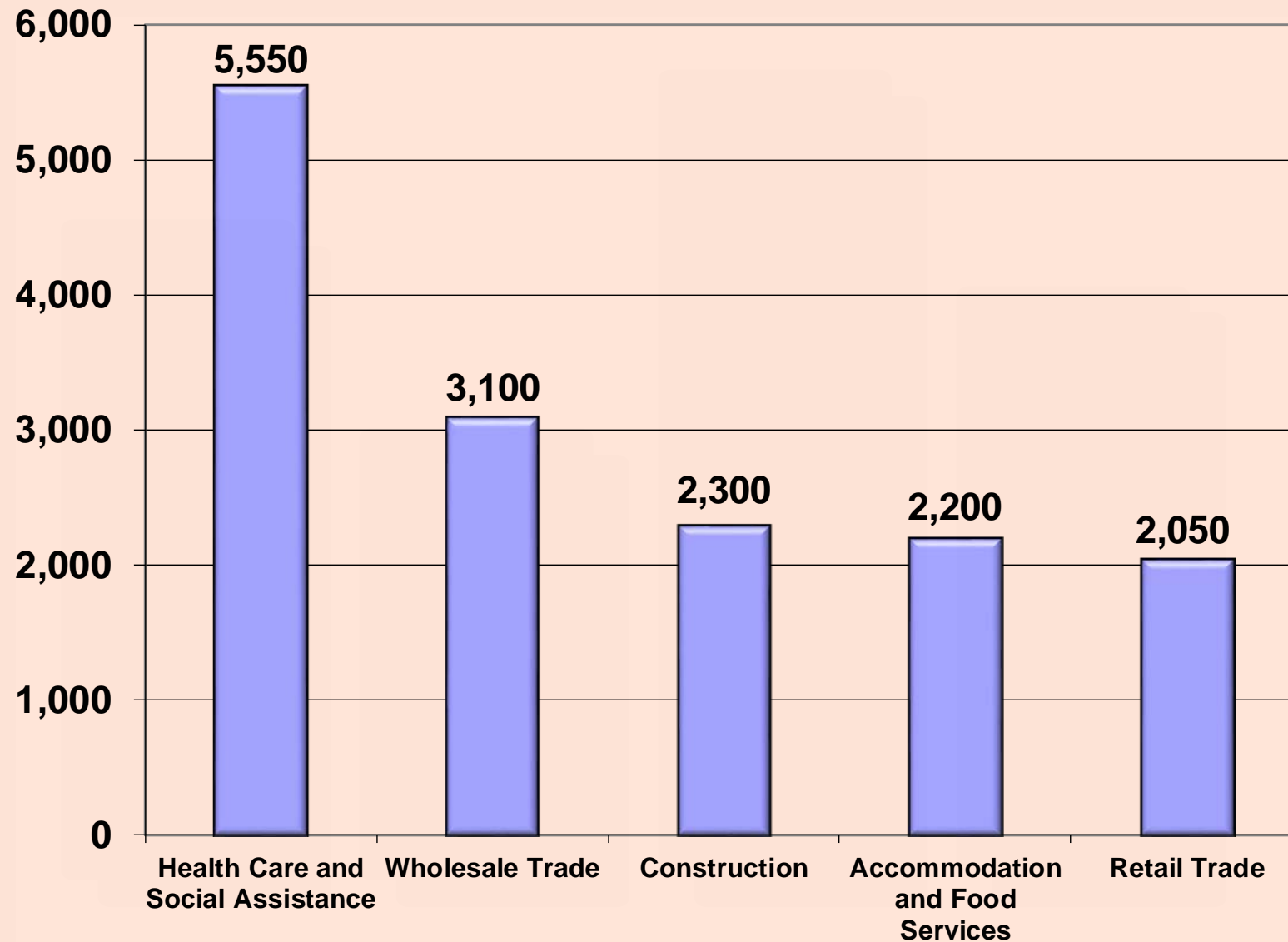
- Other ROI's range from 3:1 (Florida) to 1100:1 (Philadelphia)

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



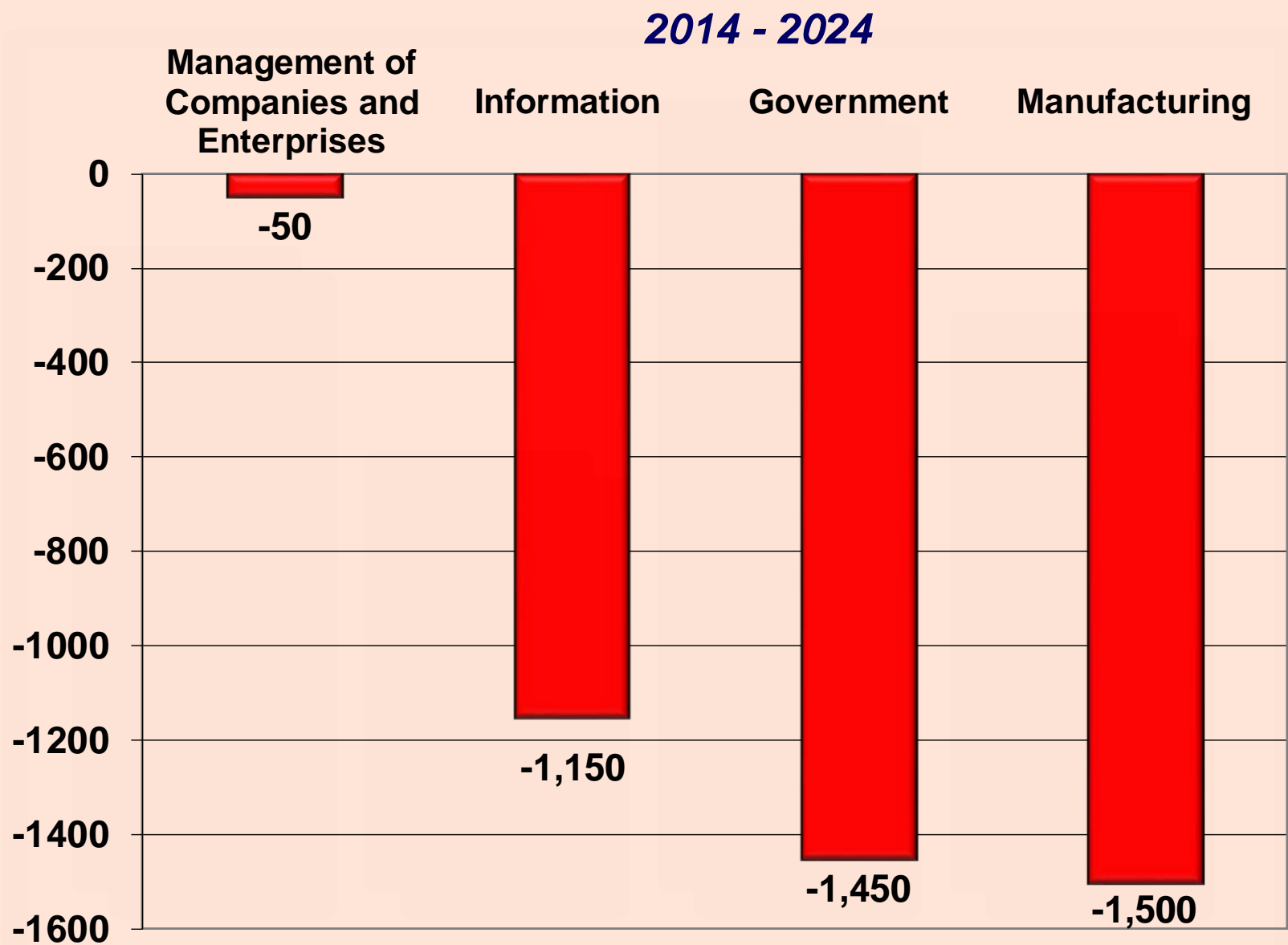
Top Growth Industries by Projected Employment Increase 2014 - 2024



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



Industries Projected to Decline in Employment

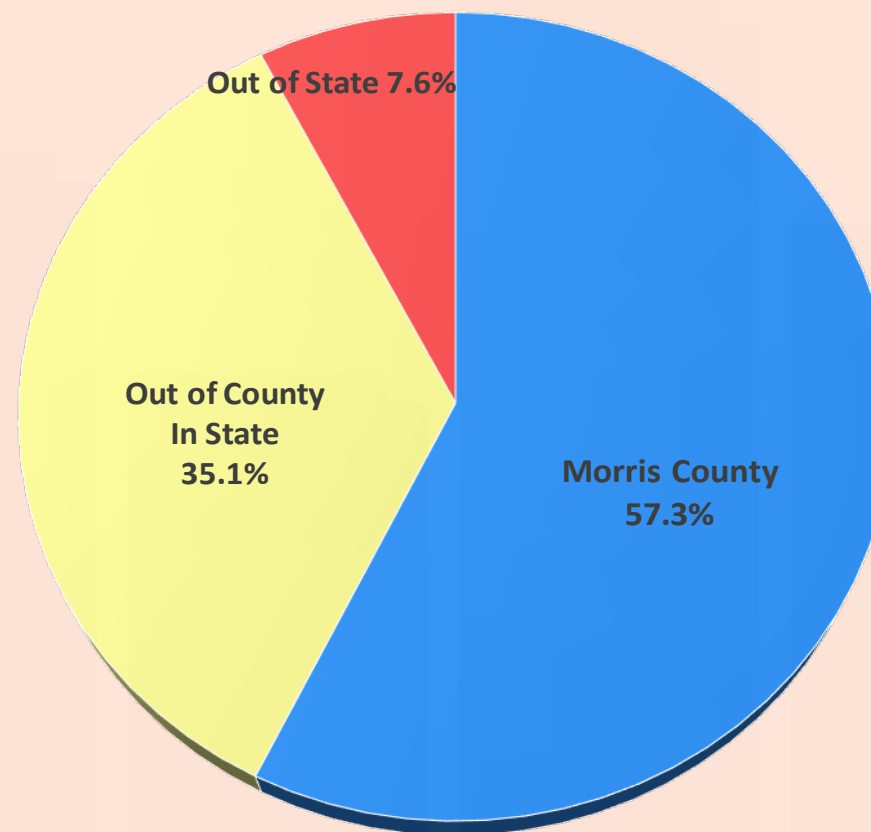


Source: N.J. Dept. of Labor and Workforce Development



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