

Morris County Talent Supply Report

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A collaborative effort between the Morris-Sussex-Warren Workforce Development Board and the Morris County Chamber of Commerce/Economic Development Corporation - Meghan Hunscher, President

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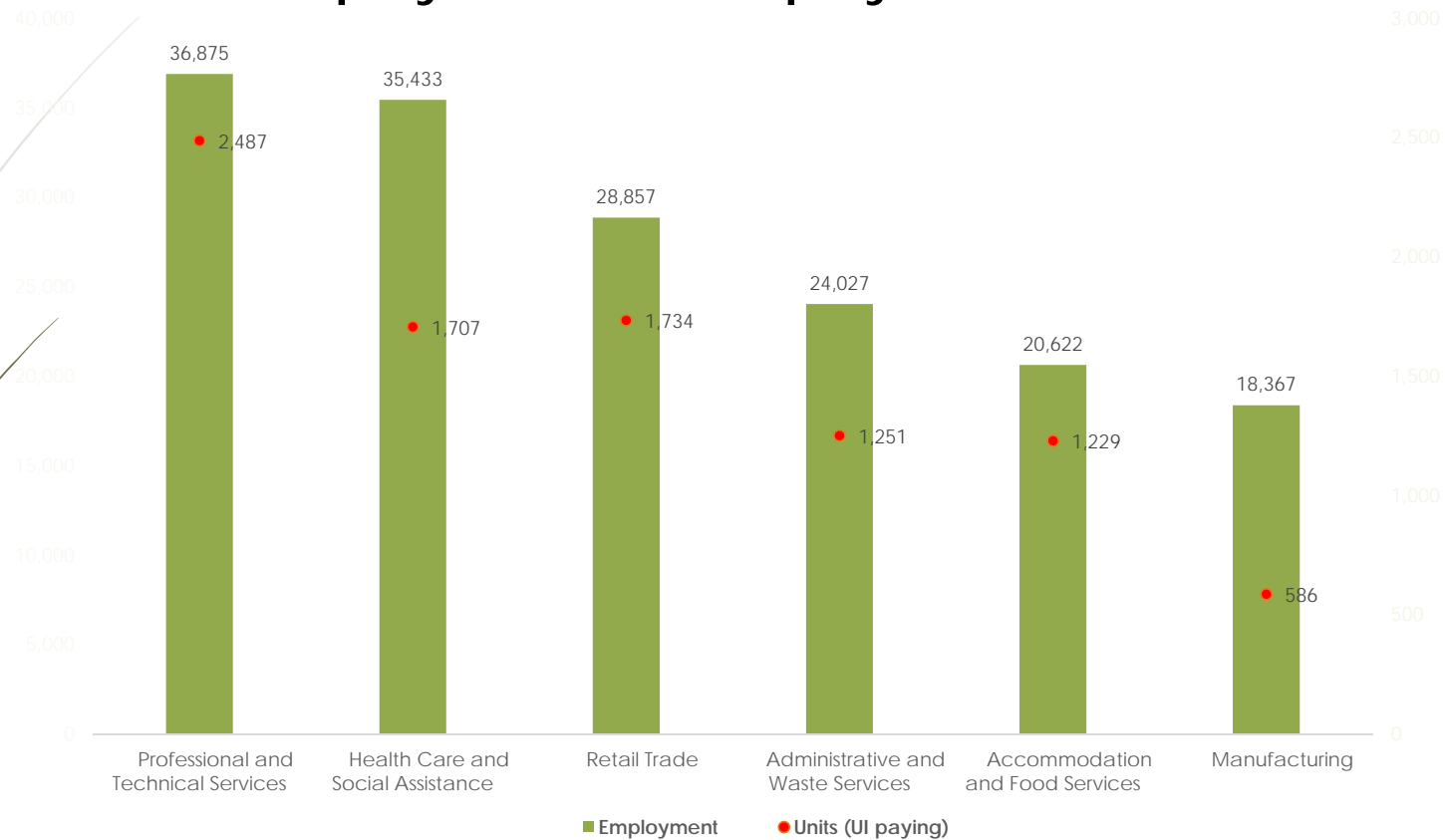


Morris County Industry Sectors

Morris County Industry Focus Summary Private Employment and Payroll 2017

- ▶ Sector with highest combined annual employment, payroll and business units:
 - *Professional, Scientific, Technical Services*
 - *Health Care and Social Assistance*
- ▶ Sector with the highest average annual wages:
 - *Management of Companies and Enterprises*
 - *Finance and Insurance*
- ▶ Sector with the lowest average annual wages:
 - *Arts, Entertainment, and Recreation*
 - *Accommodation and Food Services*
- ▶ Sector with the greatest number of Business Units:
 - *Professional, Scientific and Technical Services*
 - *Retail Trade*
- ▶ Sector with the least number of Business Units:
 - *Management of Companies and Enterprises*
 - *Arts, Entertainment and Recreation*

Morris County Top Industries 2017 Employment and Employer Establishments



Data Source: N.J. Department of Labor and Workforce Development

Morris County Employment and Wages 2017 Annual Private Sector Report

NAICS SECTOR	NAICS DESCRIPTION	Average Units*	Average Annual Employment	Payroll	Wages Average Weekly	Wages Average Annual
54	Professional and Technical Services	2,487	36,875	\$4,835,772,201	\$2,522	\$131,144
62	Health Care and Social Assistance	1,707	35,433	\$2,179,705,087	\$1,183	\$61,516
44-45	Retail Trade	1,734	28,857	\$1,094,382,541	\$729	\$37,908
56	Administrative and Waste Services	1,251	24,027	\$1,253,808,211	\$1,004	\$52,208
72	Accommodation and Food Services	1,229	20,622	\$664,782,693	\$620	\$32,240
31-33	Manufacturing	586	18,367	\$1,886,464,430	\$1,975	\$102,700
42	Wholesale Trade	1,030	15,006	\$1,647,278,026	\$2,111	\$109,772
52	Finance and Insurance	940	15,003	\$2,066,162,375	\$2,648	\$137,696
23	Construction	1,555	11,626	\$846,169,595	\$1,400	\$72,800
55	Management of Companies and Enterprises	118	11,321	\$2,788,789,182	\$4,737	\$246,324
81	Other Services, Ex. Public Admin	1,686	10,863	\$371,088,381	\$657	\$34,164
48-49	Transportation and Warehousing	353	8,572	\$465,667,819	\$1,045	\$54,340
61	Educational Services	296	5,872	\$299,236,595	\$980	\$50,960
51	Information	217	5,028	\$491,825,738	\$1,881	\$97,812
71	Arts, Entertainment, and Recreation*	206	4,901	\$110,102,002	\$432	\$22,464
53	Real Estate and Rental and Leasing	567	4,555	\$403,633,767	\$1,704	\$88,608
999	Unclassified	381	537	\$24,162,647	\$865	\$44,980
11	Agriculture, Forestry, Fishing & Hunting	38	367	\$12,201,692	\$639	\$33,228
PRIVATE SECTOR TOTAL		16,482	259,199	\$21,706,194,086	\$1,610	\$83,720

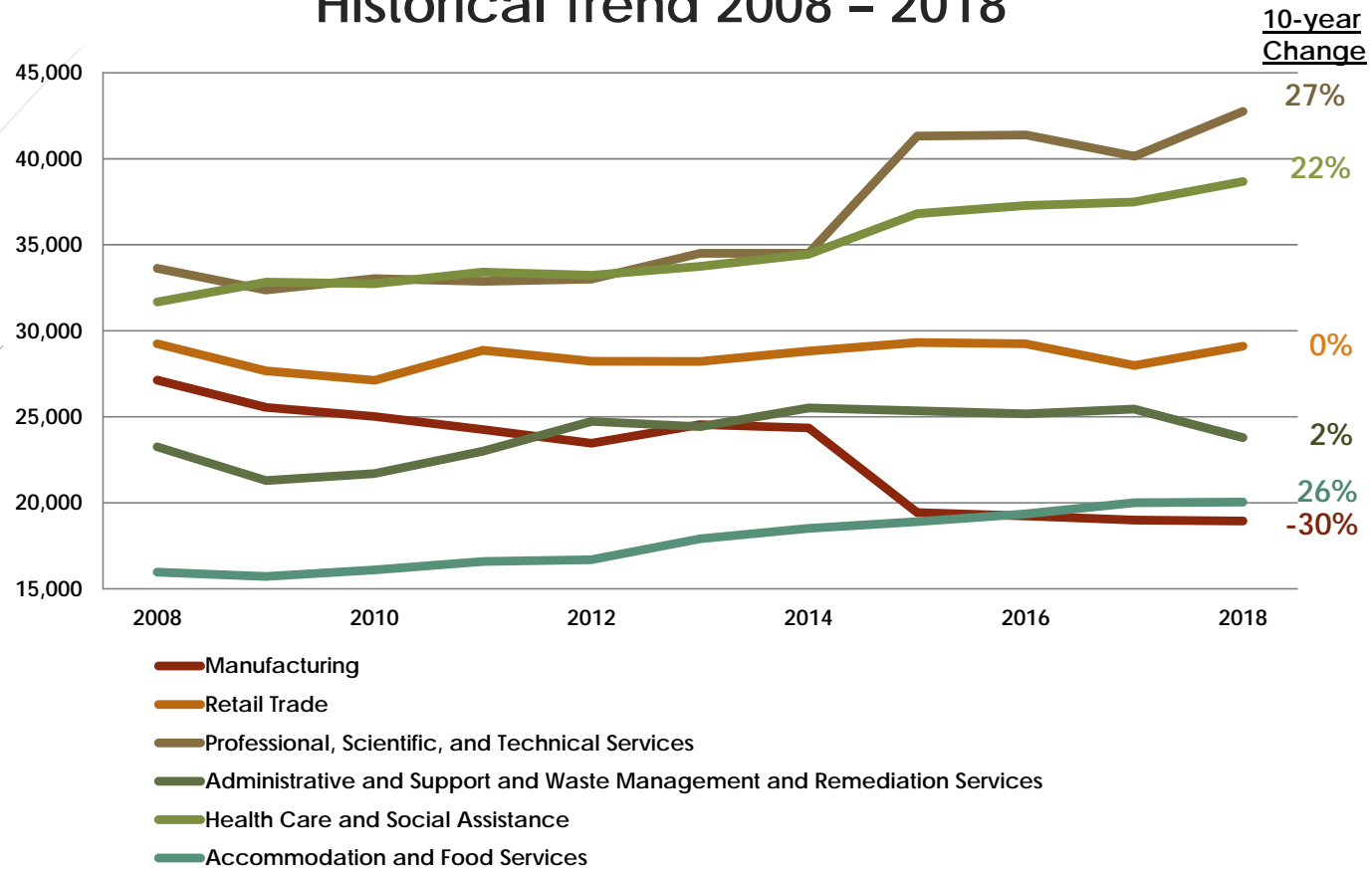
SOURCE: N.J. Department of Labor and Workforce Development. Table Revised: August 2018

NOTE: Data for industries with few units or where one employer is a significant percentage of employment or wages of the industry have been suppressed

NAICS is the North American Industrial Classification System

*Business establishments paying Unemployment Insurance (UI)

Employment for Morris County Top Industries Historical Trend 2008 – 2018



Morris County Top Industries Defined

- **Professional, Scientific and Technical Services:** Accounting, Payroll, Legal, Engineering, Computer, Design, Advertising, Consulting, Research and other Professional, Scientific, and Technical Services
- **Administrative, Support and Waste Management and Remediation Services:** Office Administrative, Facilities, Employment, Professional Employer Organizations, Business, Documentation, Telephone, Credit, Collection, Court Reporting, Travel, Security, Janitorial, Landscaping, Packaging, Waste and Materials Recovery Services
- **Retail:** Department Stores, Office Supplies, Home & Personal Care Products, Wholesale Clubs, Cigar Cigarette & Tobacco Dealers-Retail, Propane (Lp) Gas and Oils-Petroleum-Retail
- **Accommodation and Food Services:** Hotels, Motels, Banquet Rooms, Caterers, Restaurants, Camps, Campgrounds
- **Manufacturing:** Establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products. The assembling of component parts of manufactured products is considered manufacturing, except in cases where the activity is appropriately classified as Construction; includes manufacturing of Food, Chemicals, Electronic Equipment, Roofing Materials, Pharmaceutical, Medical, Heavy Equipment
- **Health Care and Social Services:** Ambulatory Health and Outpatient Care Services, Hospitals, Nursing and Residential Care Facilities, Medical and Diagnostic Laboratories, Child Care, Youth Services, Services for the Elderly and Persons with Disabilities, Vocational Rehabilitation Services and Community Food and Housing

Attached Annex shows examples of Morris County businesses in these industries.

Data Source: <https://www.census.gov/cgi-bin/sssd/naics>

Morris County Businesses

Size Defined by Number of Employees

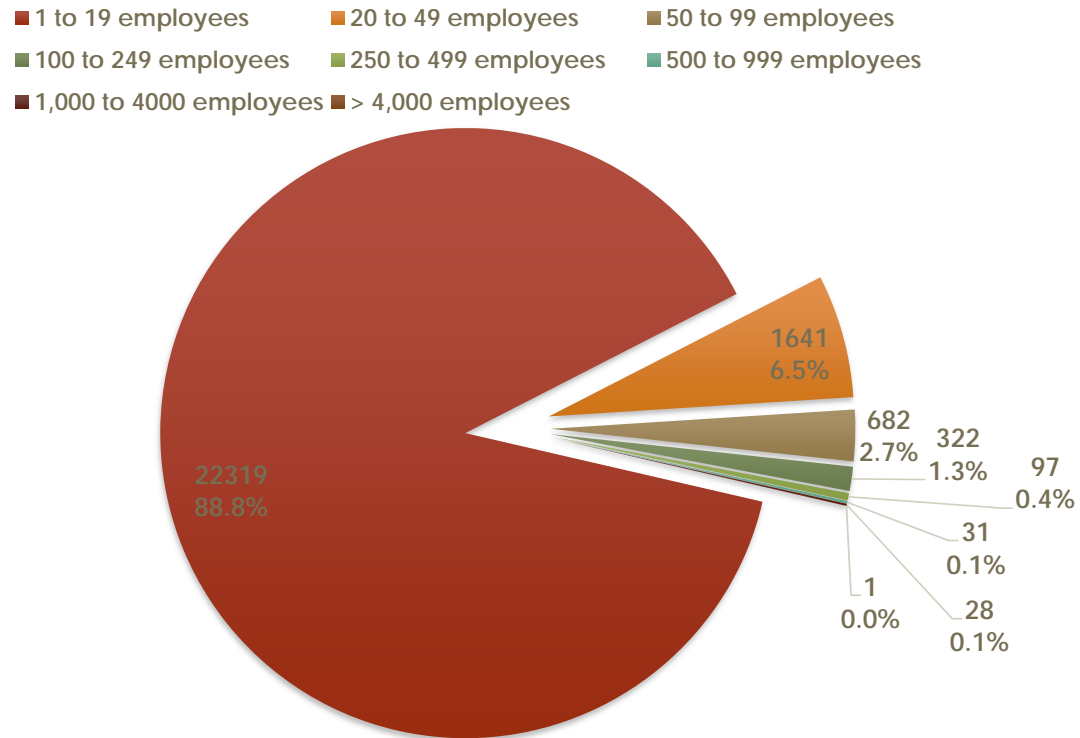
Morris County Business Establishments by Size and Industry

Industry	Size of Establishment:								Grand Total
	(1-19)	(20-24)	(50-99)	(100-249)	(250-499)	(500-999)	(1000-4000)	(4000+)	
Construction	2,344	67	23	6	5	2			2,447
Manufacturing	649	146	48	34	11	7	3	-	898
Wholesale Trade	856	99	32	19	4	3	4		1,017
Retail Trade	2,583	217	68	55	19	1	-	-	2,943
Transportation and Warehousing	447	64	17	9	1	2	-	-	540
Information	526	42	27	12	1				608
Finance and Insurance	1,371	61	20	27	11				1,490
Real Estate and Rental and Leasing	959	78	28	7	3	1	6		1,083
Professional, Scientific, and Technical Services	3,103	161	71	34	9	7	5		3,390
Management of Companies and Enterprises	25	4	1						30
Administrative and Support and Waste Management and Remediation Services	1,269	58	23	8	6	2	1		1,367
Educational Services	477	143	91	39	3	2	1		756
Health Care and Social Assistance	3,266	175	139	31	6	3	5	1	3,626
Arts, Entertainment, and Recreation	432	36	18	4					490
Accommodation and Food Services	1,244	208	51	23	17	1	2		1,546
Other Services (except Public Administration)	2,643	77	22	12					2,754
Grand Total	22,319	1,641	682	322	97	31	27	1	25,121
% of Total employers	88.8%	6.5%	2.7%	1.3%	0.4%	0.1%	0.1%	0.004%	100%

Data source: N.J. Department of Labor and Workforce Development/InfoUSA-Infogroup®

Not shown above: Agriculture, Mining, Utilities, and Other Services

Morris County Business Establishments by Size



Data source: N.J. Department of Labor and Workforce Development/[InfoUSA-Infogroup](#)®

Morris County Employment Projections

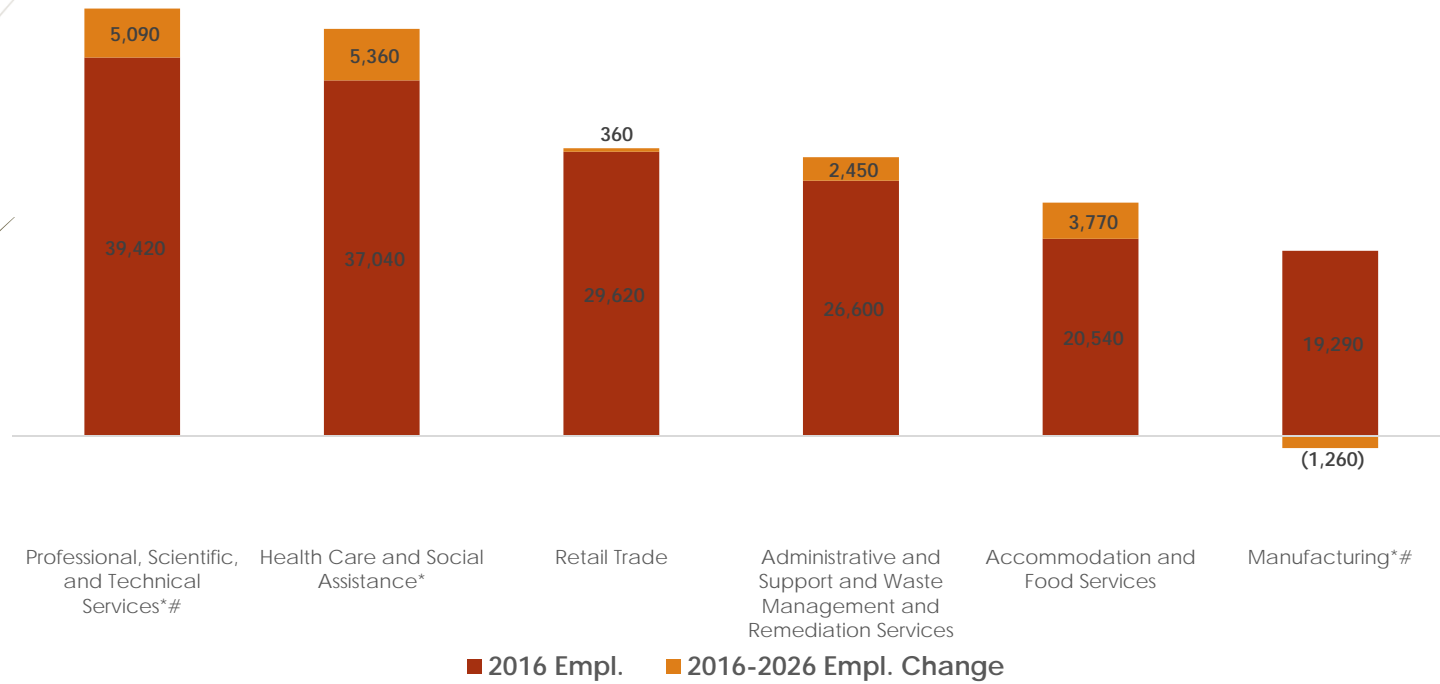
Morris County Employment Projections 2016-2026 Summary

- Sector with greatest projected employment increase:
 - *Health care and Social Assistance (#jobs)*
 - *Accommodation and Food Services (%)*

- Sector with lowest projected employment increase:
 - *Retail Trade (#jobs, %)*

- Sector with projected employment loss
 - *Manufacturing (#jobs,%)*

Employment Projections 2016-2026 Morris County Top Industries



* incl. Life Science (incl. BioPharma)
incl. Technology

Data Source: New Jersey Department of Labor and Workforce Development - Office of Research and Information/ Division of Economic and Demographic Research

Employment Projections 2016-2026 Morris County Top Industries

<u>Industry</u>	<u>2016 Employment</u>	<u>2026 Employment</u>	<u>10-year Change</u>	<u>Annual Change</u>
Professional, Scientific, and Technical Services*#	39,420	44,510	12.9%	1.3%
Health Care and Social Assistance*	37,040	42,400	14.5%	1.4%
Retail Trade	29,620	29,980	1.2%	0.1%
Administrative and Support and Waste Management and Remediation Services	26,600	29,050	9.2%	0.9%
Accommodation and Food Services	20,540	24,310	18.4%	1.8%
Manufacturing*#	19,290	18,030	-6.5%	-0.7%

* incl. Life Science (incl. BioPharma)

incl. Technology

Data Source: New Jersey Department of Labor and Workforce Development - Office of Research and Information/ Division of Economic and Demographic Research

Morris County Occupational Groups

Morris County Occupational Group Employment Summary

- Occupational group with largest number of employments:
 - *Office and Administrative Support*
 - *Sales and Related Occupations*

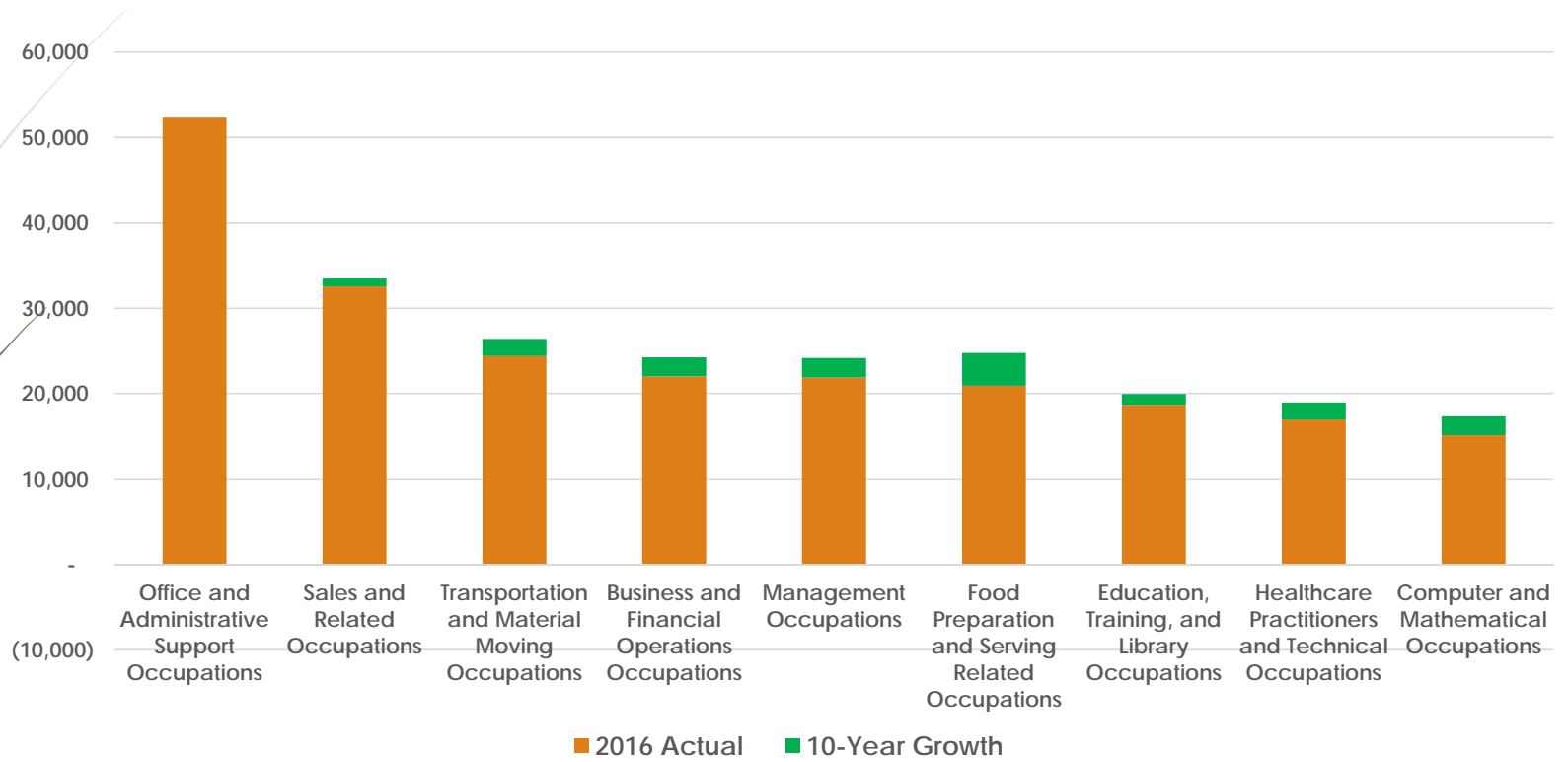
- Occupational group with least number of employments:
 - *Computer and Mathematical Occupations*

Morris County Employment Projections 2016-2026 Major Occupational Groups

	<u>2016 Actual</u>	<u>2026 Projected</u>	<u>10-Year Change</u>
Office and Administrative Support Occupations	52,310	52,230	-0.2%
Sales and Related Occupations	32,570	33,500	2.9%
Transportation and Material Moving Occupations	24,390	26,410	8.3%
Business and Financial Operations Occupations	22,020	24,240	10.1%
Management Occupations	21,880	24,180	10.5%
Food Preparation and Serving Related Occupations	20,910	24,760	18.4%
Education, Training, and Library Occupations	18,670	19,950	6.9%
Healthcare Practitioners and Technical Occupations	16,990	18,960	11.6%
Computer and Mathematical Occupations	15,110	17,430	15.4%

Data Source: New Jersey Department of Labor and Workforce Development - Office of Research and Information/ Division of Economic and Demographic Research

Morris County Employment Projections 2016-2026 Major Occupational Groups

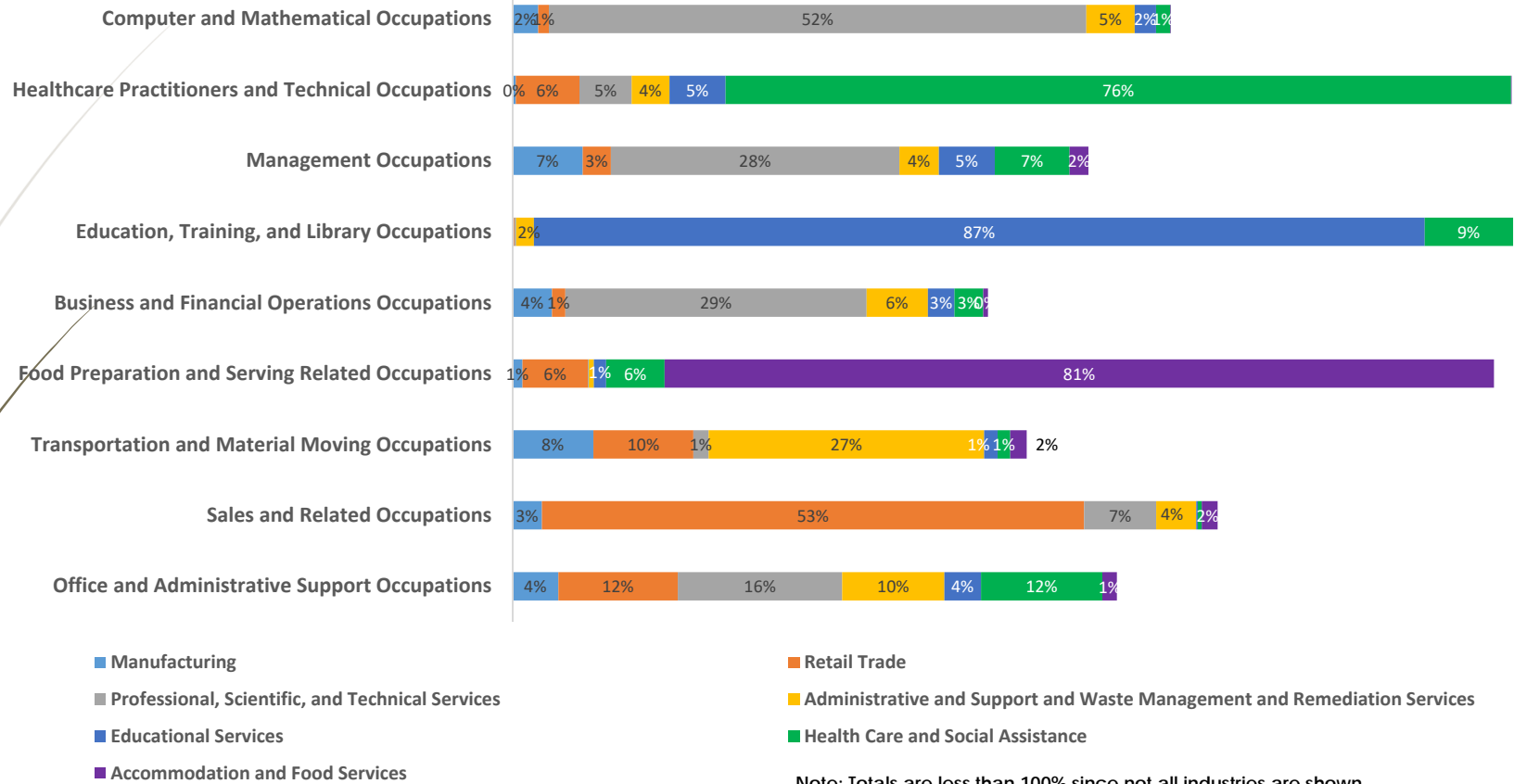


Data Source: New Jersey Department of Labor and Workforce Development - Office of Research and Information/ Division of Economic and Demographic Research

Morris County Alignment of Occupations and Industry Sectors Summary

- ▶ *Healthcare, Food Preparation, Education Occupations* align with the same name industry sectors
- ▶ *Computer and Mathematical, Business and Financial Operations and Management* align with the Professional, Scientific and Technical sector
- ▶ *Sales and Related Occupations and Office and Administrative Support Occupations* found in all sectors

Morris County Major Occupational Groups within the Top Industry Sectors (%)



Data Source: New Jersey Department of Labor and Workforce Development - Office of Research and Information/ Division of Economic and Demographic Research

Morris County Employment and Occupations Summary

- Sectors with greatest number of combined employees, payroll, and establishments:
 - *Professional, Scientific and Technical*
 - *Health Care and Social Assistance*
- Sectors with most business establishments in Morris County:
 - *Professional, Scientific and Technical*
 - *Retail Trade*
- Sectors reporting highest wages:
 - *Management of Companies and Enterprises*
 - *Finance and Insurance*
- Largest projected employment growth:
 - *Food Service and Accommodations*
 - *Computer and Mathematics*
 - *Healthcare Practitioners and Technical Occupations*
- Largest Occupational groups and found in all industry sectors:
 - *Office and Administrative Support*
 - *Sales and Related Occupations*

Degree Requirement for Major Occupational Groups

Degree Requirements Based on Morris County Projected 2016-2026 Job Openings

Job Openings = Growth + Replacements (Exits + Transfers)

- 34% No Formal Education
- 33% HS Diploma
- 19% Bachelor's Degree
- 7% Post-Secondary Non-Degree Award
- 3% Some College
- 2% Associate's Degree
- 2% Master's or Doctorate

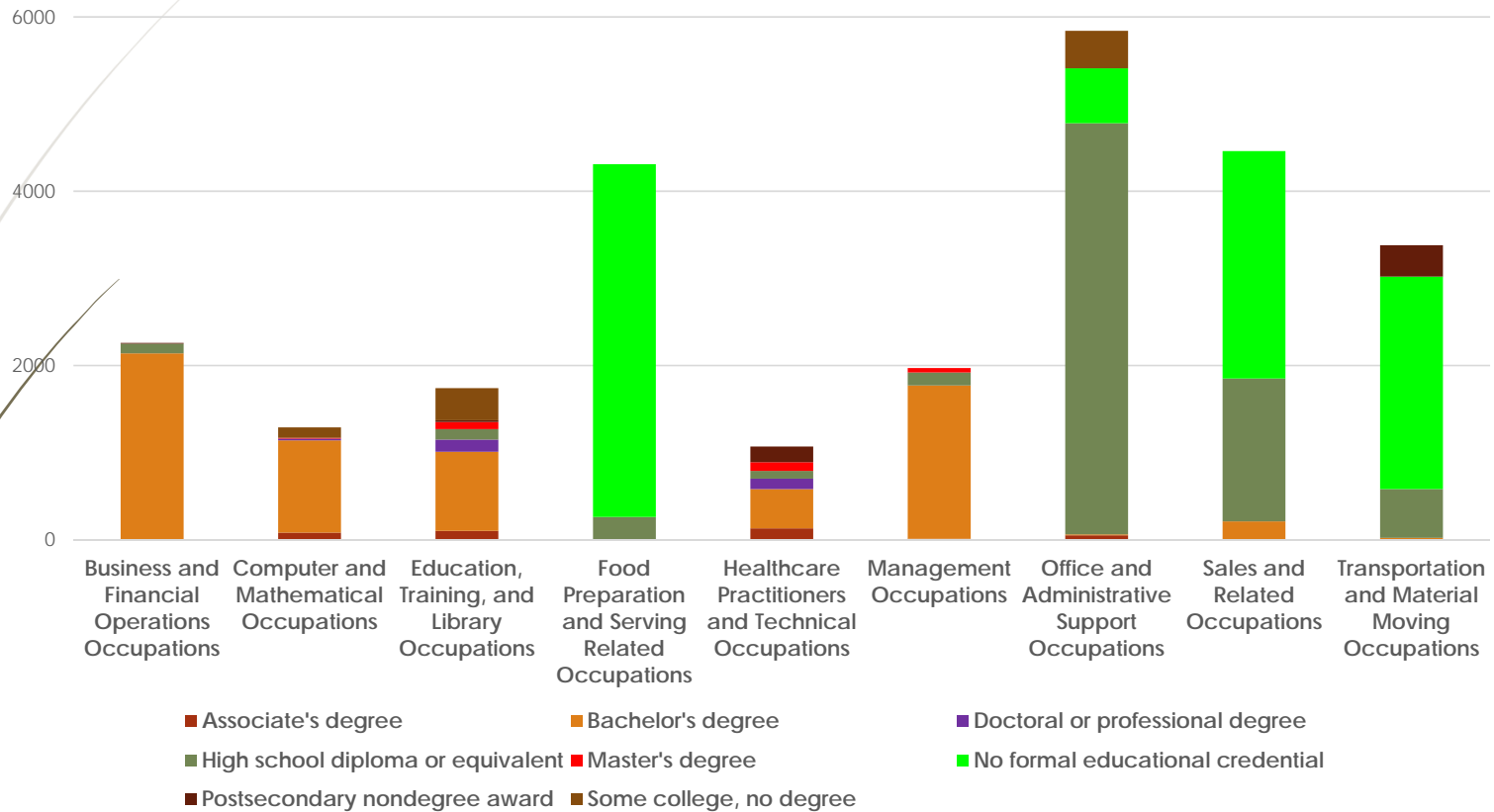
Degrees Required Overall and for Major Occupational Groups in Morris County*

	All Openings	Business and Financial Operations Occupations	Computer and Mathematical Occupations	Education, Training, and Library Occupations	Food Preparation and Serving Related Occupations	Healthcare Practitioners and Technical Occupations	Management Occupations	Office and Administrative Support Occupations	Sales and Related Occupations	Transportation and Material Moving Occupations
Associate's degree	1.8%	0%	6%	6%	0%	12%	1%	1%	0%	0%
Bachelor's degree	19.2%	95%	82%	52%	0%	42%	89%	0%	5%	1%
Doctoral or professional degree	1.4%	0%	2%	8%	0%	11%	0%	0%	0%	0%
High school diploma or equivalent	33.0%	5%	0%	7%	6%	8%	8%	81%	37%	17%
Master's degree	1.0%	0%	1%	5%	0%	9%	3%	0%	0%	0%
No formal educational credential	34.5%	0%	0%	0%	94%	0%	0%	11%	59%	72%
Postsecondary non degree award	6.5%	0%	0%	1%	0%	17%	0%	0%	0%	11%
Some college, no degree	2.5%	0%	9%	21%	0%	0%	0%	7%	0%	0%
Grand Total	100.0%	100%	100%	100%	100%	100%	100%	100%	100%	100%

*Based on 2016-2026 projected openings (growth, exits, and occupational transfers)

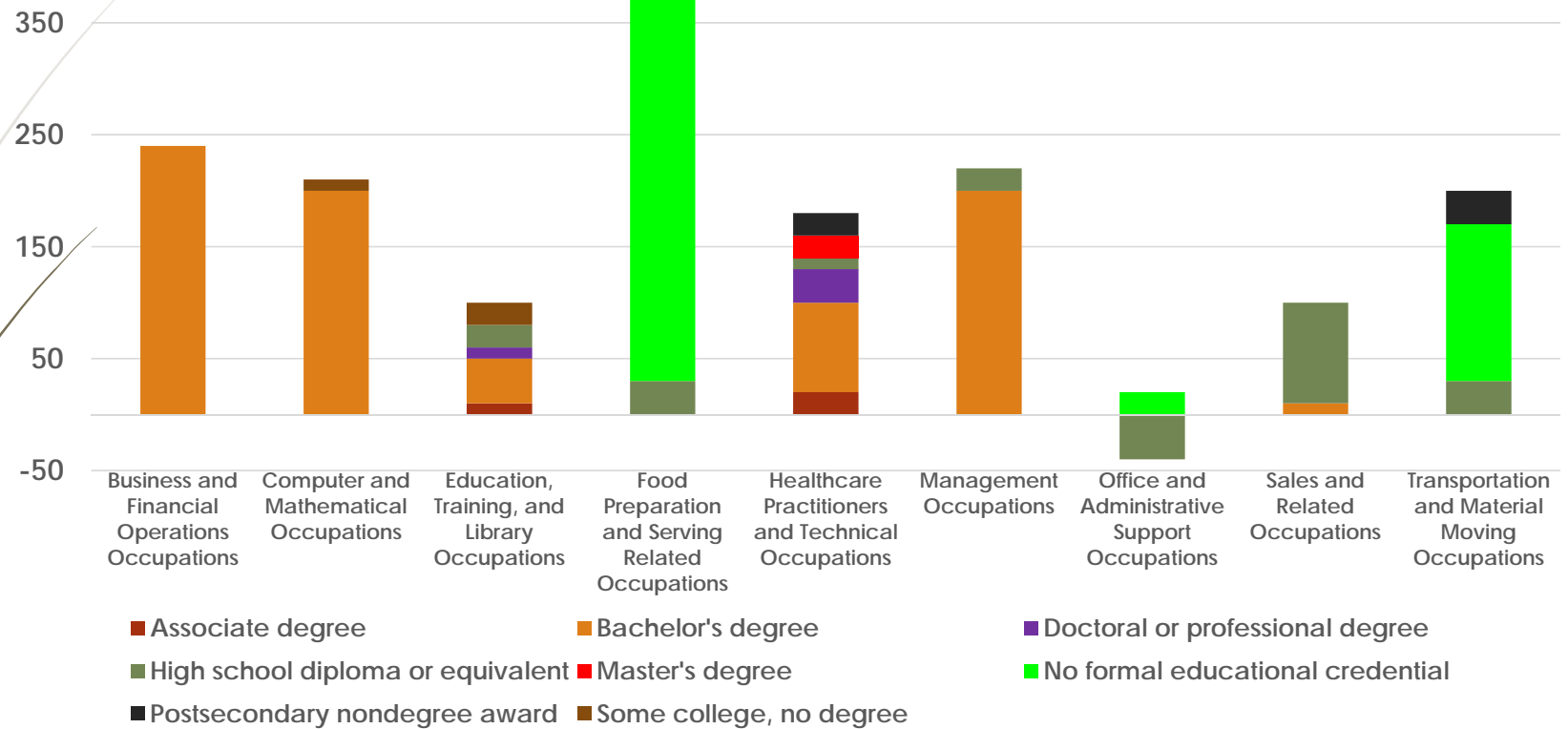
Data Source: New Jersey Department of Labor and Workforce Development - Office of Research and Information/ Division of Economic and Demographic Research

Morris County Annual Job Openings (2016 – 2026) Degree Requirements for Major Occupation Groups



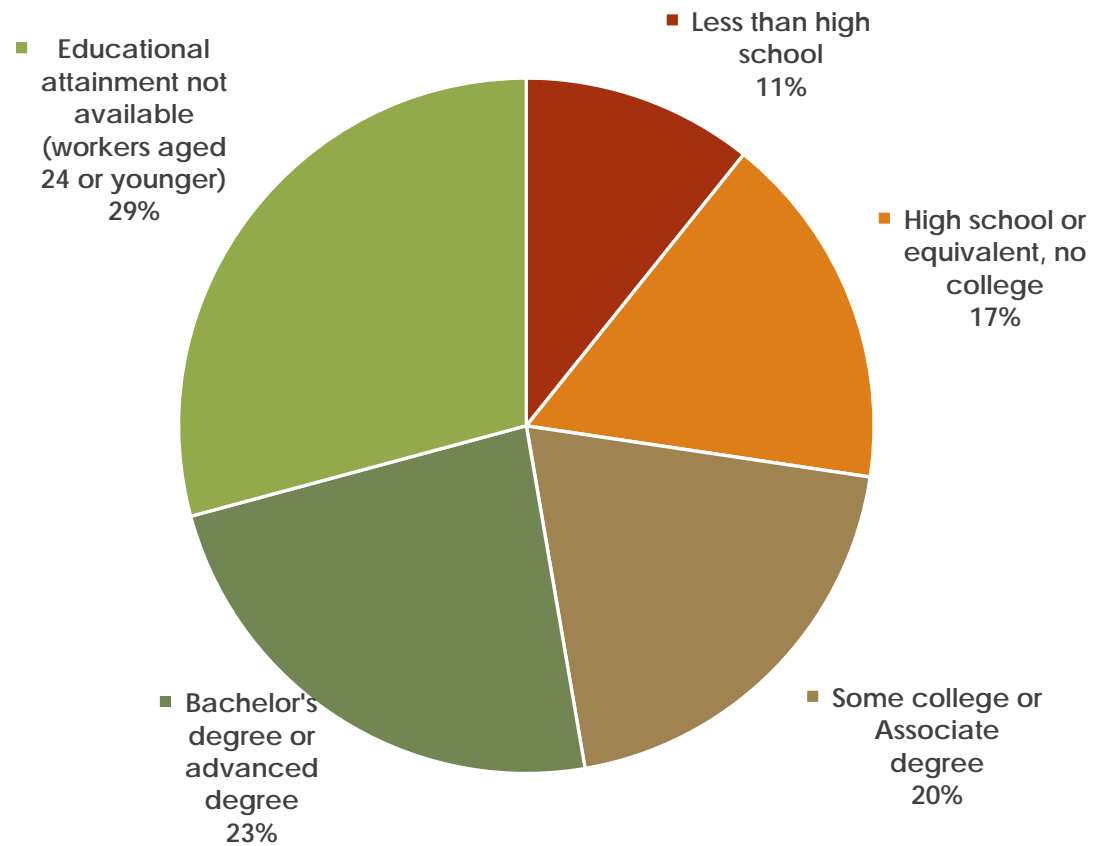
Data Source: New Jersey Department of Labor and Workforce Development - Office of Research and Information/ Division of Economic and Demographic Research

Morris County Annual Job Growth (2016 - 2026) Degree Requirements for Major Occupational Groups



Data Source: New Jersey Department of Labor and Workforce Development - Office of Research and Information/ Division of Economic and Demographic Research

Educational Attainment of Hires Morris County 2017



Data source: qwexplorer.ces.census.gov

Morris County Graduates in 2017

- ▶ Number of High School graduates **6050** (source NJDOE)
- ▶ Number of certificate and degree completions **3796***

*Excludes: PC Age Career Institute, Global Knowledge, American Production and inventory Control Society-Northern NJ Chapter

Morris County Educational/Vocational Institutions Post Secondary Program Completions (Certificates and Degrees)

	<u>Completions</u>		<u>Change</u>
	<u>2003</u>	<u>2017</u>	
Morris County	4,440	3,796	-14.5%

Award Level	Completions (2017)	Percent of Total
Certificates, Credentials, or Licenses	680	17.9%
Post Bachelors/Masters Certificates	33	0.9%
Associate's Degree	1,326	34.9%
Bachelor's Degree	1,086	28.6%
Master's Degree	522	13.8%
Doctor's Degree	149	3.9%
Total	3,796	

2017 New Jobs: 16,153 (source: BLS)

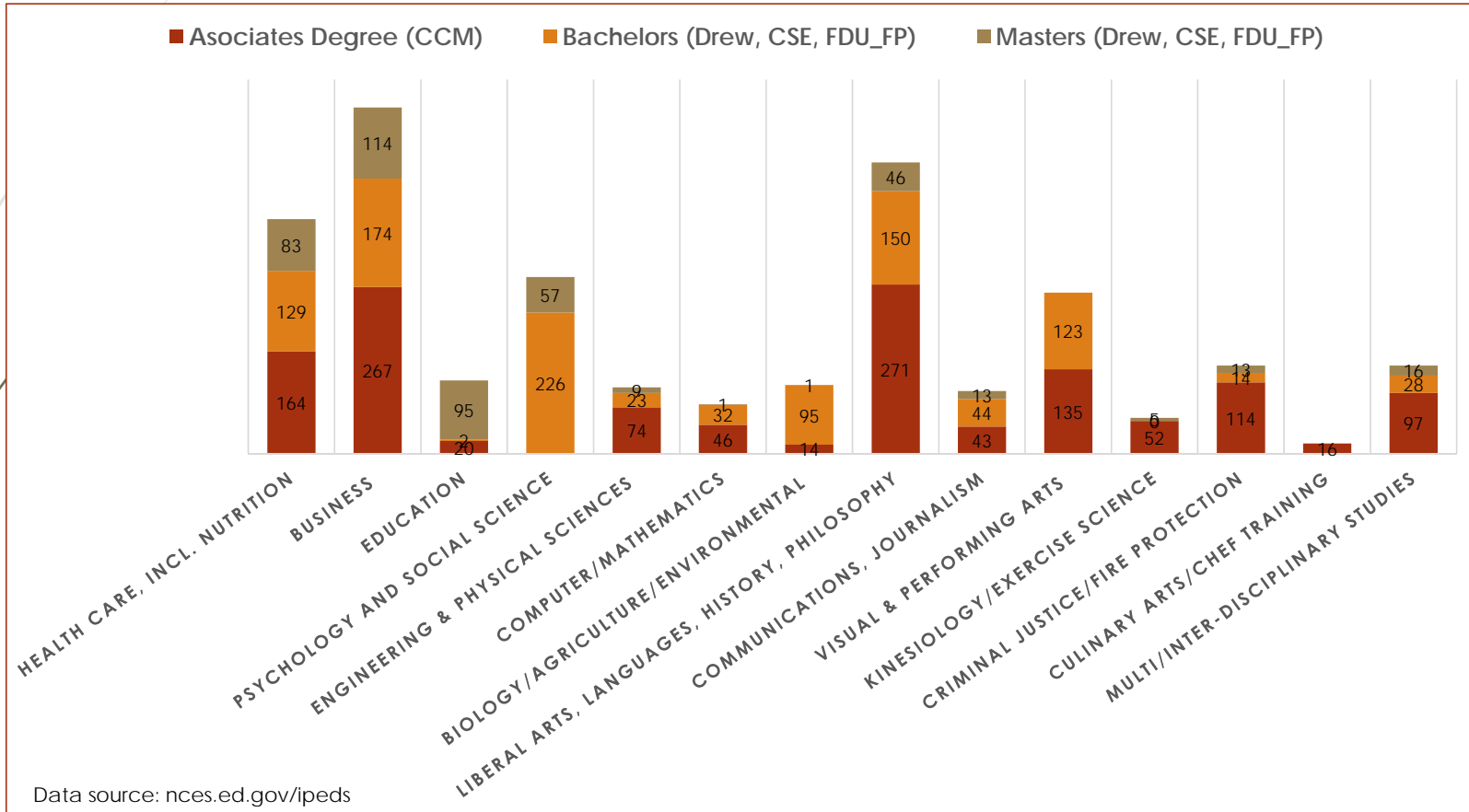
Data sources: IPEDS, Ace Healthcare, E-Z Wheels

Morris County Post-Secondary Education by Institution 2017

Institution	Certificates, Credentials, or Licenses (2017)	Degrees (2017)	Total Completions (2017)
County College of Morris	5	1,319	1,324
Fairleigh Dickinson University-Florham Campus	1	844	845
Drew University	0	507	507
College of Saint Elizabeth	39	365	404
Assumption College for Sisters	4	7	11
Rabbinical College of America	0	41	41
E-Z Wheels - Dover	131		131
Ace Healthcare - Dover	130		130
Christine Valmy International School of Esthetics & Cosmetology	124		124
Artistic Academy of Hair Design	116		116
Branford Hall Career Institute-Parsippany	50		50
Cutting Edge Academy	50		50
Morris County Vocational School District	40		40
Joe Kubert School of Cartoon and Graphic Art	23		23
Total	713	3,083	3,796
		2017 New Jobs:	16,153

Data sources: IPEDS, Ace Healthcare, E-Z Wheels

Degrees Awarded by Morris County Institutions in 2017 Fields of Study



Morris County Training Programs Leading to Licensure/Credential/Certificate

Program of Studies	Certificates, Credentials, or Licenses (2017)
Personal Services (e.g., Cosmetology)	299
Health Care incl. Dietetics/Nutrition (e.g., CNA, Medical Assistant)	211
Transportation (CDL A, B, Forklift)	131
Commercial Art and Graphic Design	28
Engineering/Technology (HVAC, CAD/CAM)	12
Religious/Theological Studies	12
Education and Related Studies	11
Computer Systems Networking	6
Child Care Provider	3
Total	713

Data sources: IPEDS, Ace Healthcare Training, E-Z Wheels

Morris County Specific Occupations within Top Industries Projected Annual Openings and Required Education

- ▶ **Computer and Mathematical Occupations**
 - ▶ Software developers, applications 530 – Bachelor's Degree
 - ▶ Computer Systems Analysts 100 – Bachelor's Degree
 - ▶ Computer user support specialists 110 - Some College/Associate Degree, Industry Certification

- ▶ **Health Care Practitioners and Technical Occupations***
 - ▶ Registered nurses 430 – Bachelor's Degree
 - ▶ Licensed Practical Nurses, Licensed Vocational Nurses 160 – Post Secondary Non-Degree Award
 - ▶ Pharmacy Technicians 80 - High School Diploma & On-the-Job Training

- ▶ **Business and Financial Occupations**
 - ▶ Accountants and Auditors 400 – Bachelor's Degree
 - ▶ Business Operations Specialists (all others) 370 – Bachelor's Degree
 - ▶ Market Research Analysts and Marketing Specialists 250 Bachelor's Degree

- ▶ **Management Occupations**
 - ▶ General and Operations Managers 380 Bachelor's Degree
 - ▶ Financial Managers 200 Bachelor's Degree
 - ▶ Managers, all others 370 Bachelor's Degree

*excl. Nursing Assistants 550 and Home Health Aides 420

Morris County Specific Occupations within Top Industries Projected Annual Openings and Required Education - *continued*

- ▶ **Food Preparation and Serving Occupations**
 - ▶ Waiters and Waitresses 950 On-the-job training
 - ▶ Combined Food Preparation and Serving Workers (incl. Fast Food) 760 On-the-job training
 - ▶ Counter Attendance, cafeteria, food concession, and coffee shop 530 On-the-job training

- ▶ **Transportation and Material Moving Occupations**
 - ▶ Laborers and freight, stock, and material movers 1350 - On-the-job training
 - ▶ Packers and packagers handlers 410 On-the-job training
 - ▶ Heavy and tractor-trailer truck drivers 370 On-the-job training & CDL

- ▶ **Sales and Related Occupations**
 - ▶ Retail Salespersons; 1220 High School Diploma
 - ▶ Cashiers 1140 High School Diploma
 - ▶ Sales Representatives Services, all others 480 High School Diploma

- ▶ **Office and Administrative Support**
 - ▶ Customer Service Representatives 790 High School Diploma
 - ▶ Office Clerks, general 640 High School Diploma
 - ▶ Stock Clerks and Order Fillers 640 On-the-job training



Morris County Demographics

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Morris County Residents Major/Field of Study (Bachelor's Degrees) 2017

Business	23%
Education	10%
Social Sciences	9%
Engineering	9%
Science and Engineering Related	8%
Computers/Mathematics & Statistics	6%
Biology, Agriculture & Environmental	5%
Psychology	5%
Literature & Language	5%
Liberal Arts	4%
Communications	4%
Physical and Related Science	4%
Visual & Performing Arts	3%

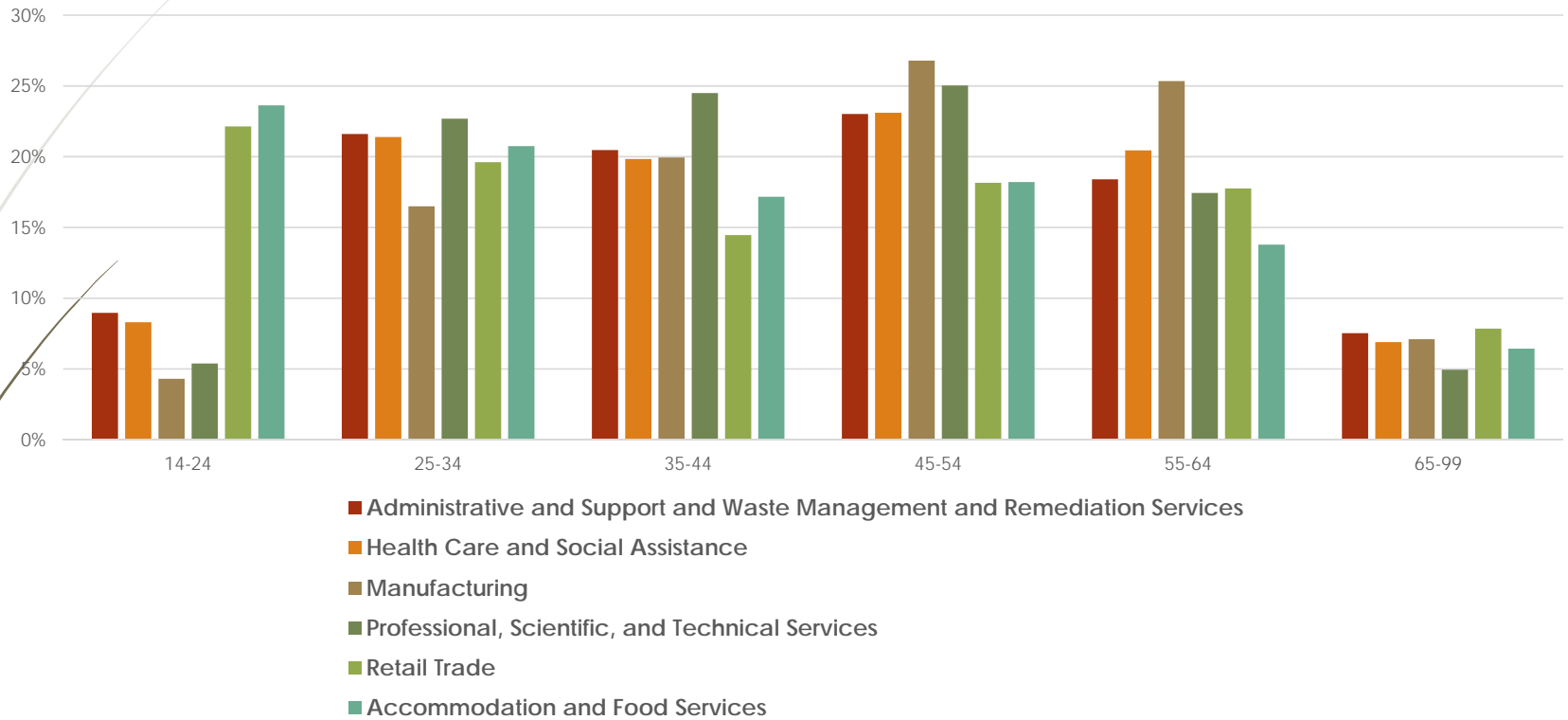
source: 2017 ACS

<https://www.towncharts.com/New-Jersey/Education/Morris-County-NJ-Education-data.html#Figure10>

Morris County Age Groups by Top Industry Sectors 2017 Summary

- ▶ Retail Trade (14-24, 25-34)
- ▶ Accommodation and Food Services (14-24, 25-34)
- ▶ Healthcare (25-34, 45-54)
- ▶ Manufacturing (45-54, 55-64)
- ▶ Professional, Scientific and Technical Services (35-44, 45-54)
- ▶ Administrative Support (25-34, 45-54)

Morris County Age Group Distribution within Top Industry Sectors 2017



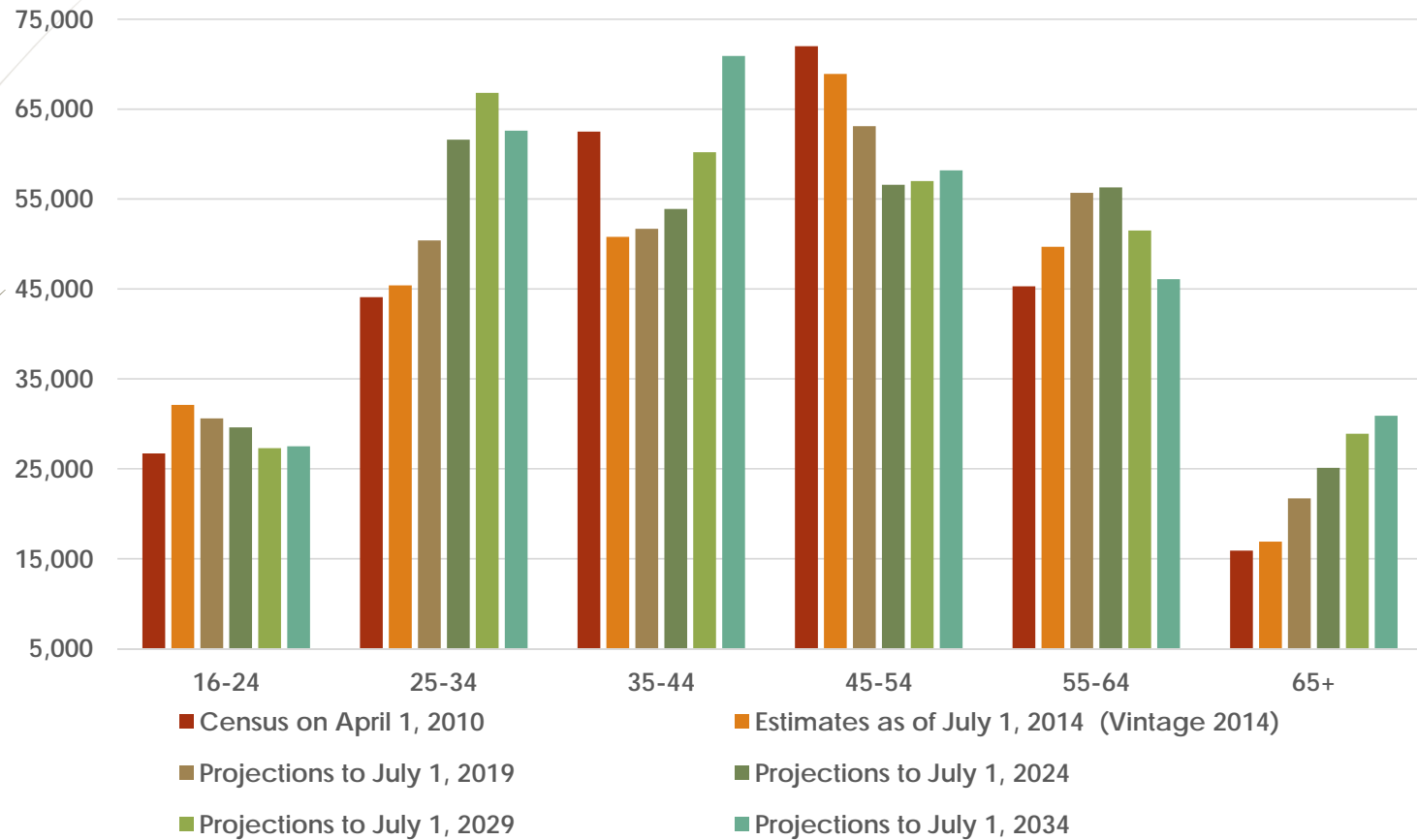
Data source: Ledextract.les.census.gov

Morris County Workforce Age Projections Summary

- Age group with greatest number of individuals 2014:
 - Demographics (45-54, 65+)
 - Labor Force Participation (45-54, 35-44)

- Age group with greatest number of individuals 2034:
 - Demographics (65+, 35-44)
 - Labor Force Participation (35-44, 25-34)

Morris County Workforce Projections by Age Groups



Data Source: N.J. Department of Labor and Workforce Development

Morris County Cost of Living Calculation* - 2017

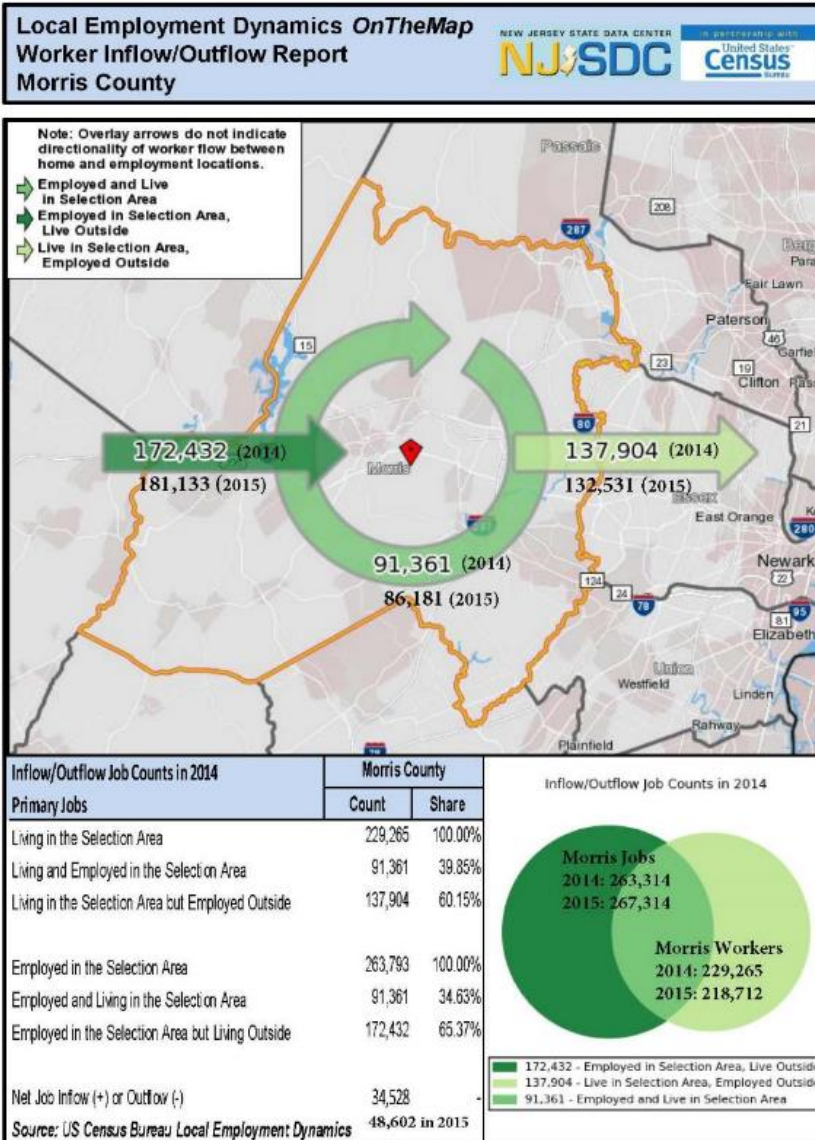
Family Size and Required Living Wage

<u>Occupation Group</u>	<u>Annual Salary</u>	<u>Hourly</u>	<u>1 Adult</u>	<u>2 Adults (1 working)</u>	<u>1 adult 1 child</u>	<u>2 Adults (1 working)/1 child</u>
Management	\$134,998	\$64.90				
Computer & Mathematical	\$97,553	\$46.90				
Legal	\$91,093	\$43.79				
Architecture & Engineering	\$88,747	\$42.67				
Life, Physical, & Social Science	\$84,900	\$40.82				
Healthcare Practitioners & Technical	\$80,394	\$38.65				
Business & Financial Operations	\$79,602	\$38.27				
Education, Training, & Library	\$58,441	\$28.10				
Construction & Extraction	\$57,814	\$27.80			\$27.72/hour	
Arts, Design, Entertainment, Sports, & Media	\$54,131	\$26.02				
Installation, Maintenance, & Repair	\$52,783	\$25.38				
Community & Social Service	\$51,837	\$24.92				\$24.99/hour
Protective Service	\$43,864	\$21.09				
				\$20.52/hour		
Office & Administrative Support	\$39,009	\$18.75				
Production	\$35,295	\$16.97				
Transportation & Material Moving	\$32,158	\$15.46				
Sales & Related	\$29,843	\$14.35				
Healthcare Support	\$29,627	\$14.24				
Building & Grounds Cleaning & Maintenance	\$29,102	\$13.99	\$13.74/hour			
Personal Care & Service	\$26,582	\$12.78				
Farming, Fishing, & Forestry	\$26,047	\$12.52				
Food Preparation & Serving Related	\$23,825	\$11.45				

*includes Food, Child Care, Housing, Transportation, Medical, Other (e.g., Clothing)

Data source: <http://livingwage.mit.edu/counties>

March 2019



Data for 2015 overlaid on 2014 Chart

Morris County Talent Supply Report Recommendations

Project Short Term Goals

- Recruit business representation from the top industry sectors to participate in the development of the Morris County Workforce Strategic Plan
- Survey and interview representation from each industry sector to gather more detailed information on workforce needs
- Recruit representation from K-12 and post-secondary institutions to participate in the project and complete the inventory of educational programs and capacity to meet the identified workforce needs and create a regional database of training/educational programs
- Include data at a more granular level to identify talent supply/demand gaps

Strategic Use of Findings

- Institutionalize this project within the Chamber of Commerce/WDB to assess workforce needs on an annual basis and develop a talent supply strategic plan for Morris County
- Develop messaging for use by stakeholders to recruit talent by promoting Morris County employment opportunities and quality of life

Morris County Talent Supply Report Acknowledgements

- Our thanks to the New Jersey Department of Labor and Workforce Development - Office of Research and Information/Division of Economic and Demographic Research for their support and assistance.
- We also thank the members of the Morris County Workforce Committee, including Dr. Anthony Iacono, County College of Morris President, and Superintendent Scott Moffitt of the Morris County Vocational School District, for their support and insight.