

Regional Focus: South Jersey

Data and analysis for the Atlantic City-Hammonton, Camden, Ocean City, and Vineland-Bridgeton labor areas

Regional Employment Advances Despite Casino Closures

The Southern Region's level of nonfarm payroll employment totaled an estimated 731,500 (not seasonally adjusted) for March 2015, a jump of 7,200 or 1.0 percent from March 2014. In comparison, the state's payrolls advanced by 0.9 percent (+35,100 jobs) during the one-year period. While New Jersey's payrolls posted a fourth consecutive March-to-March increase, area jobholding rebounded after declining from 2013 to 2014.

According to estimates from the United States Bureau of Labor Statistics (BLS), the sectors that led regional job increases were construction (+4,400, +17.1%), educational and health services (+2,100, +1.7%), professional and business services (1,300, +1.4%) and other services (+1,200, +4.7%). Regional job contraction occurred primarily in the leisure and hospitality sector which fell by 3,100 or 3.4 percent over the year due to the contraction of Atlantic City's casino/hotel industry. Smaller job losses occurred in manufacturing (+500, -1.1%), trade, transportation and utilities (T/T/U; +500, -0.3%), government (-700, -0.6%), financial activities (-400, -1.2%) and information (-300, -3.5%).

The state posted significant job gains in the T/T/U (+11,800 or +1.4%), educational and health services (+10,700 or +1.7%) and construction (+9,000 or +7.0%) super-sectors. T/T/U advances were bolstered by gains in each of its component industries: transportation, warehousing and utilities (+5,100 jobs), retail trade (+4,200) and wholesale trade (+2,500). Employment in educational and health services was up due to an increase in health care and social assistance (+12,900 jobs) which offset the loss in educational services (-2,200). Employment gains in construction were mainly due to specialty trade contractors (+7,000 jobs). The biggest employment loss was in the professional business services sector. (-7,300 jobs or -1.2%).

Construction and Camden Labor Area leads the way

The area's largest labor area, Camden (Burlington, Camden & Gloucester counties), saw the largest payroll expansion (+6,300 jobs, or +1.2%) over the year. The Ocean City Labor Area (Cape May County), which has the smallest employment base in the region, also added jobs (+2,600, +7.8%). The Atlantic City-Hammonton Labor Area (Atlantic County) shed 1,500 jobs (-1.1%) while payrolls in the Vineland-Bridgeton Labor Area (V-B, Cumberland County) were virtually unchanged (-200 jobs, -0.4%).

In the Camden Labor Area, the greatest job gain occurred in con-

Change in Nonfarm Employment March 2014 - March 2015p (not seasonally adjusted)

	Region		State	
	Net	%	Net	%
Total Nonfarm Employment	7,200	1.0	35,100	0.9
Private Sector	7,900	1.3	29,500	0.9
Construction ¹	4,400	17.1	8,900	6.8
Manufacturing ¹	500	1.1	2,000	0.8
Trade, Trans. & Utilities	500	0.3	11,800	1.4
Information ¹	-300	-3.5	-300	-0.4
Financial Activities ¹	-400	-1.2	-1,100	-0.4
Prof. & Business Svcs. ¹	1,300	1.4	-7,300	-1.2
Ed. & Health Svcs.	2,100	1.7	10,700	1.7
Leisure & Hospitality	-3,100	-3.4	-600	-0.2
Other Services ¹	1,200	4.7	5,400	3.3
Government	-700	-0.6	5,600	0.9

Source: NJLWD, Current Employment Statistics

¹Employment does not include data for Cape May County



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struction where staffing levels rose by 3,200 (+16.6%), followed by professional and business services (+1,600, +2.1%), educational and health services (+1,500, +1.7%) and other services (+900, +5.0%). Within professional and business services, the administrative support & waste management subsector saw staffing gains by employment service employers in the tri-county area (+2,400, +11.1%). Continuing a trend to make healthcare more conveniently accessible, ambulatory health care contributed 2,900 jobs (10.2%) to the expansion in health care and social assistance (+2,500). Significant downsizing occurred in T/T/U (-1,200, -1.1%) with payrolls in the general freight trucking subsector being reduced by over a quarter (-1,300 or -26.5%). New Century, a Westampton (Burlington County) trucking firm, closed in June 2014 after filing for bankruptcy resulting in the termination of 1,500 workers.

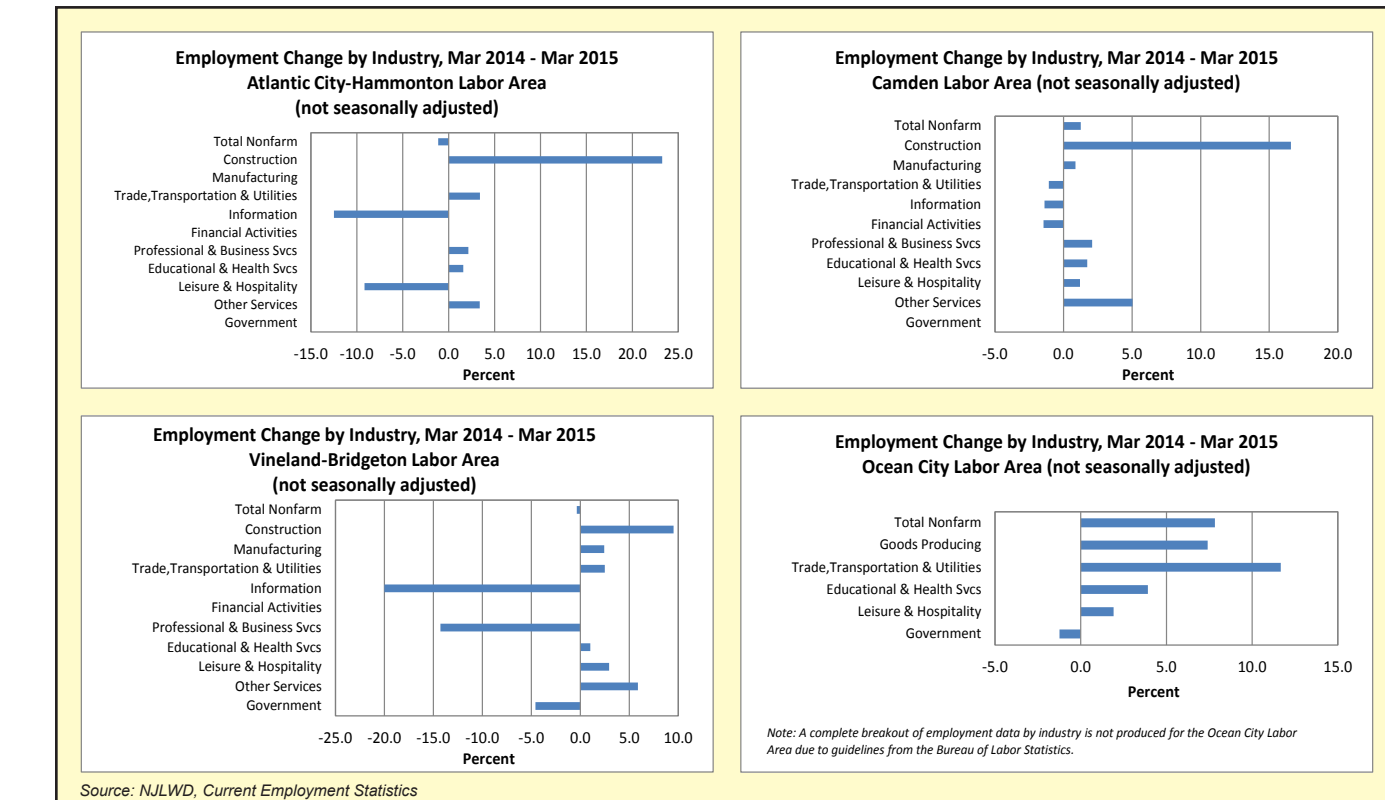
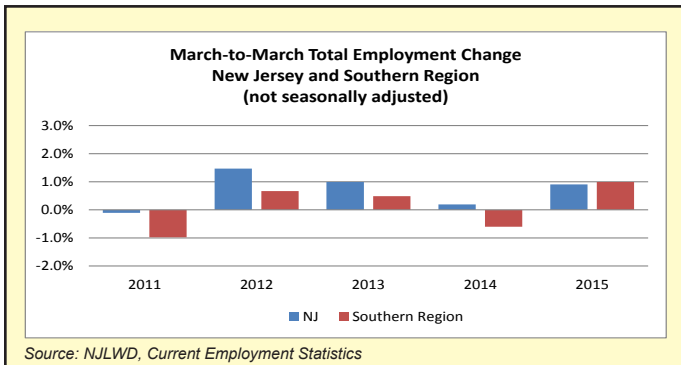
According to estimates published in accordance with federal agency guidelines, Cape May County's private service-providing businesses added 2,700 jobs or 10.8 percent to payrolls. TTU had a noteworthy increase adding 700 to payrolls, a gain of 3.4 percent. The other published industries experienced minimal change over the year.

In the Atlantic City Labor Area, the majority of job loss was once again in the county's largest sector, leisure and hospitality (-3,800 or -9.2%) with the main culprit being casino hotels (-5,800 or -22.0%). Three casinos closed since March 2014; Showboat, Revel and Trump Plaza shuttered their doors in late summer. On the positive side, construction expanded by 1,000 workers (+23.3%). Food services and drinking places boosted employment by 800 (+6.7%) and T/T/U (+700, +3.4%) added 400 to staff its local retail stores supporting Atlantic City's ongoing transformation from a solely gambling resort town to a more diversified destination.

In Cumberland County (Vineland/Bridgeton Labor Area), government (-600, -4.6%) and professional and business services (-500, -14.3%) relinquished the most positions. Offsetting some of those employment losses were increased staffing levels in the goods-producing components: construction and manufacturing (+200 jobs each).

Total Nonfarm Employment (unadjusted March data, employment in thousands)						
	2010	2011	2012	2013	2014	2015
New Jersey	3797.3	3793.2	3,848.9	3887.0	3894.5	3929.6
Southern Region	727.5	720.4	725.2	728.7	724.3	731.5
Atlantic City-Hammonton Labor Area (Atlantic County)	134.6	132.0	134.3	132.8	130.7	129.2
Camden Labor Area (Burlington, Camden, Gloucester counties)	501.7	499.0	500.7	506.5	504.7	511.0
Ocean City Labor Area (Cape May County)	32.9	32.4	32.6	32.5	33.2	35.8
Vineland-Bridgeton Labor Area (Cumberland County)	58.3	57.0	57.6	56.9	55.7	55.5

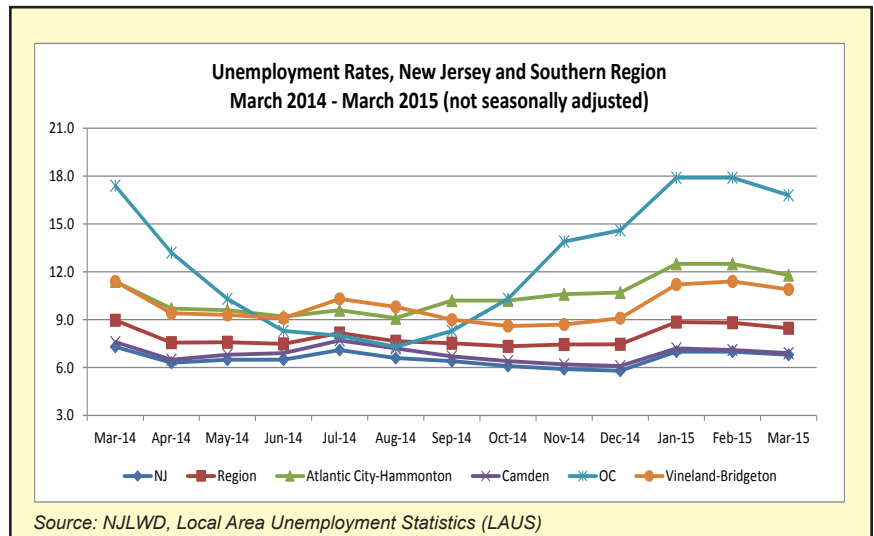
Source: NJLWD, Current Employment Statistics



More detailed data from the Current Employment Statistics (CES) program can be found at: http://lwd.dol.state.nj.us/labor/lpa/employ/ces/ces_index.html

LABOR FORCE DATA

- The Southern Region's not seasonally adjusted labor force, grew by 0.7 percent from March 2014 to March 2015. In comparison the labor force statewide grew by 0.5 percent. The regional and statewide unadjusted unemployment rates improved by 0.5 percentage point from the same month a year ago. The rate for the combined seven-county region trended down from 9.0 percent to 8.5 percent while the state's rate improved from 7.3 to 6.8 percent.



- With a March 2015 unemployment rate of 6.9 percent, the Camden Labor Area had the lowest rate among the region's labor areas and showed the most improvement (-0.7 percentage point) over the year. Despite having the region's highest unadjusted monthly rate (16.8%), the Ocean City Labor Area's unemployment rate was still lower by 0.6 percentage point since March 2014. The biggest contributor to Ocean City's high March rate is their highly seasonal workforce. The area's unemployment rate typically climbs to an annual high in the winter months following the summer tourist season. Due to the rash of casino hotel closures during the year, the Atlantic City-Hammonton Labor Area was the only area where the unemployment rate was up from March 2014 to March 2015 (11.4% to 11.8%).

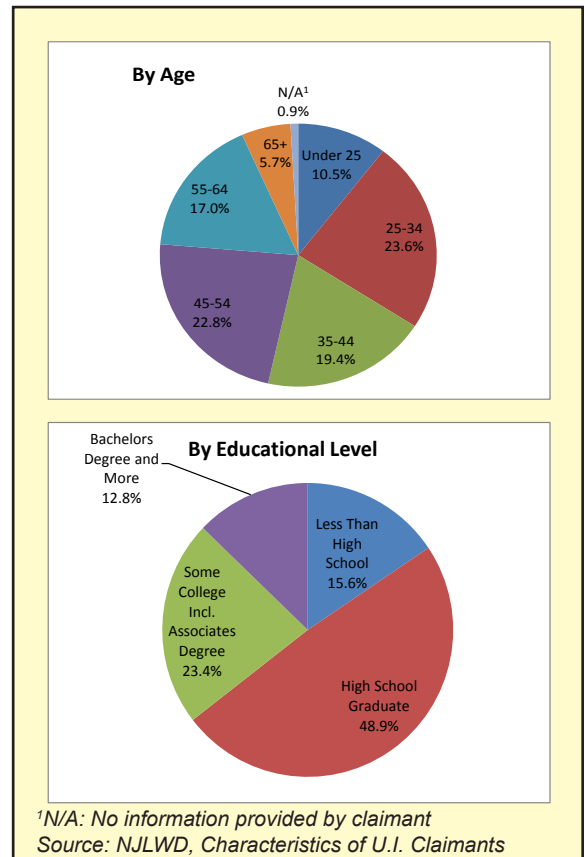
More detailed data from the Local Area Unemployment Statistics (LAUS) program can be found at: http://lwd.dol.state.nj.us/labor/lpa/employ/uirate/lfest_index.html

CHARACTERISTICS OF NEW JERSEY'S INSURED UNEMPLOYED SOUTHERN REGION, FIRST QUARTER 2015

CLAIMANTS BY OCCUPATIONAL GROUP		
	Number	Percent
Management	3,700	5.9
Business and financial	1,469	2.3
Professional and related	5,038	8.1
Services	17,339	27.7
Sales and related	4,490	7.2
Office and administrative support	6,563	10.5
Farming, fishing and forestry	681	1.1
Construction and extraction	7,549	12.1
Installation, maintenance and repair	2,450	3.9
Production	4,823	7.7
Transportation and material moving	8,141	13.0
Military	265	0.4

- In the first quarter of 2015, southern region residents accounted for nearly one-third (29.0%) of the people claiming continued unemployment insurance benefits throughout New Jersey. Out of the 62,545 total claimants in the region, 58.1 percent were male, 65.2 percent white, 48.9 percent were high school graduates (with no additional college), 22.5 percent worked in the leisure and hospitality industry, 27.7 percent in service occupations and 29.3 percent earned an average wage between \$10,001 and \$20,000.

- Atlantic County had the most claimants (16,474) in the region and the majority were previously employed in the leisure & hospitality sector (44.1% or 7,270) which is not surprising following closings in the casino/hotel industry. The region's largest employment sector, trade, transportation & utilities, had the second highest number of claimants during the first quarter (12,106). About 45 percent of regional claimants previously employed in the sector resided in Burlington, Camden or Gloucester County, whose economies are heavily dependent on wholesale and retail trade as well as transportation and warehousing.



REGIONAL POPULATION ESTIMATES

Intercensal Population Estimates for New Jersey and the Southern Region: 2010 to 2014

	Population		Change	
	2010	2014	Number	Percent
New Jersey	8,791,894	8,938,175	146,281	1.7%
Southern Region	1,845,474	1,844,368	-1,106	-0.1%
Atlantic	274,549	275,209	660	0.2%
Burlington	448,734	449,722	988	0.2%
Camden	513,657	511,038	-2,619	-0.5%
Cape May	97,265	95,344	-1,921	-2.0%
Cumberland	156,898	157,389	491	0.3%
Gloucester	288,288	290,951	2,663	0.9%
Salem	66,083	64,715	-1,368	-2.1%

Source: U.S. Census Bureau, Population Division

- The population of the Southern Region totaled 1,844,368 in 2014 and represented 20.6 percent of the total population statewide. Since 2010 the region's population is estimated to have remained virtually unchanged (-1,106 or -0.1%) while the state saw an overall increase of 146,281 or 1.7 percent.
- In the Southern Region, four counties increased their population from 2010 to 2014 while three counties experienced a decline in their population, with the sharpest declines occurring in less urbanized counties like Salem (-2.1%) and Cape May (-2.0%). Those two counties still had less than 100,000 residents (64,715 and 95,344, respectively). Cape May was the only county in New Jersey to suffer from natural decrease (1,400 more deaths than births) between 2010 and 2014.
- Of the eight counties statewide that experienced population declines between 2013 and 2014, Atlantic (-1,000) and Camden (-1,100) suffered the greatest losses.

SPECIAL NOTE REGARDING LABOR MARKET AREA DEFINITIONS

Starting with the publication of January 2015 data on March 17th, New Jersey's Department of Labor and Workforce Development will release nonfarm employment estimates and labor force statistics based on new labor market area definitions.

Every 10 years, the U.S. Office of Management and Budget (OMB) re-defines federal statistical areas which includes metropolitan statistical areas (MSAs) based on the application of updated 2010 statistical standards to the U.S. Census Bureau's 2010 Census population and American Community Survey journey-to-work data. As a result, the geographic configurations for some of New Jersey's labor areas will change. Monthly nonfarm wage and salary estimates, labor force estimates and other economic series will be generated based on these new geographic configurations. In addition, historical data series for these new areas have been reconstructed back to 1990. The following table shows a comparison of the previous and new Labor Area designations.

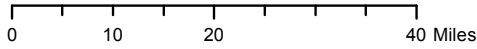
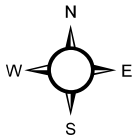
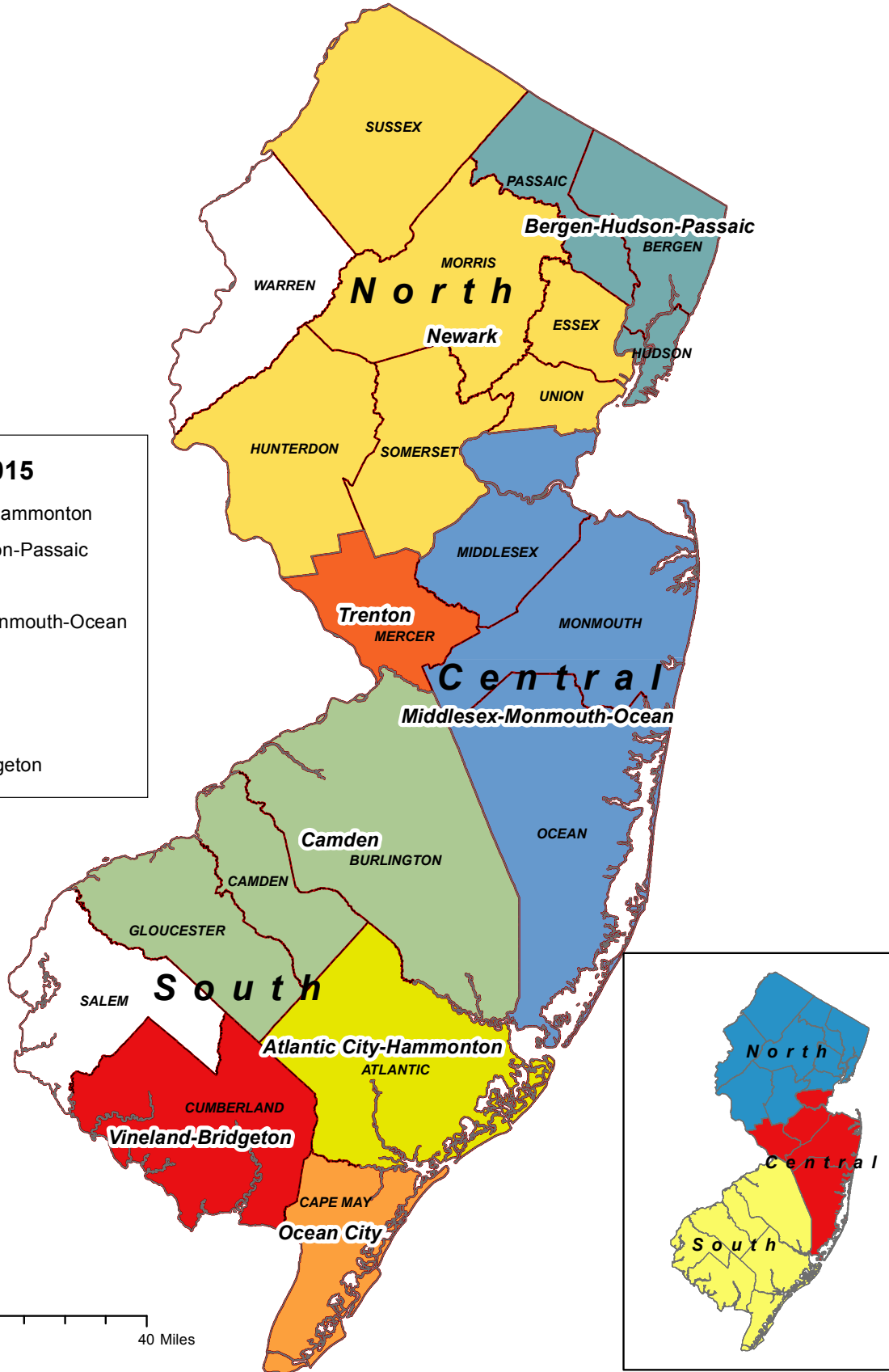
Consequently, the regions for which the Northern and Central Regional Focus is written will also change. The Northern Region will now include Somerset County formerly in the Central Region. All other county regional assignments will remain the same. See the map for the new regional county alignments.

2000 Census-based Labor Areas	Counties Covered	New 2010 Census-based Labor Areas	Counties Covered
Atlantic City-Hammonton Labor Area	Atlantic County	Atlantic City-Hammonton Labor Area	Atlantic County
Bergen-Hudson-Passaic Labor Area	Bergen, Hudson, & Passaic counties	Bergen-Hudson-Passaic Labor Area	Bergen, Hudson, & Passaic counties
Camden Labor Area	Burlington, Camden & Gloucester counties	Camden Labor Area	Burlington, Camden & Gloucester counties
Edison Labor Area*	Middlesex, Monmouth, Ocean & Somerset counties	Middlesex-Monmouth-Ocean Labor Area	Middlesex, Monmouth, & Ocean counties
Newark-Union Labor Area*	Essex, Hunterdon, Morris, Sussex, Union, & Pike (PA) counties	Newark Labor Area	Essex, Hunterdon, Morris, Somerset , Sussex, Union, & Pike (PA) counties
Ocean City Labor Area	Cape May County	Ocean City Labor Area	Cape May County
Trenton-Ewing Labor Area	Mercer County	Trenton Labor Area	Mercer County
Vineland-Millville-Bridgeton Labor Area	Cumberland County	Vineland-Bridgeton Labor Area	Cumberland County

Labor Areas 2015

Labor Areas 2015

- Atlantic City-Hammonton
- Bergen-Hudson-Passaic
- Camden
- Middlesex-Monmouth-Ocean
- Newark
- Ocean City
- Trenton
- Vineland-Bridgeton



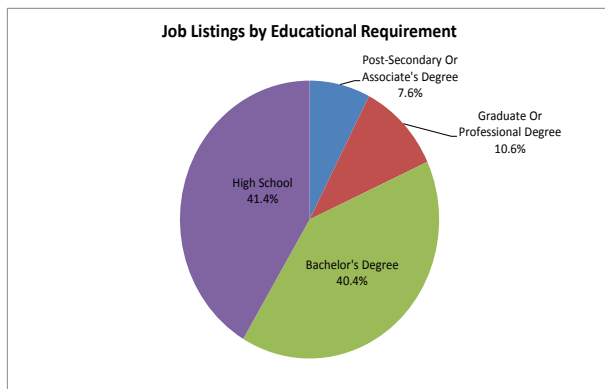
Note: Warren County is part of the Allentown-Bethlehem-Easton MSA (Labor Area), & Salem County is part of the Wilmington, Metropolitan Division (Labor Area).
 Source: NJLWD, Office of Research & Information, Division of Economic & Demographic Research
 Prepared by: Division of Workforce Research & Analytics, Bureau of Labor Market Information, March 2015

REGIONAL JOB OUTLOOK JANUARY 2015 - MARCH 2015

The New Jersey Department of Labor and Workforce Development through its agreement with Burning Glass Technologies is able to provide the the following labor market information aggregated from online employer job listings during the quarter. This data provides valuable insight regarding current demand for characteristics such as skills and educational requirements. Note that this data is not meant to represent all available employment opportunities but rather should be viewed in terms of analysis of labor market demand.

JOB LISTINGS BY COUNTY	
County	Listings
Burlington	12,185
Camden	11,272
Atlantic	4,898
Gloucester	3,926
Cumberland	2,683
Salem	1,386
Cape May	1,268

- During the first quarter of 2015, southern region employers in hospitals, ambulatory health care services, food services and drinking places, professional, scientific and technical services, educational services, credit intermediation and related activities, and food and beverage stores exhibited the most industry demand based on online job listing activity. Some top employers were Bayada Home Health Care, TD Bank, Shop-Rite, Oracle and Virtua Health.
- Concentrated in its two most populous counties, Burlington and Camden, employers indicated they were interested in filling positions for registered nurses, retail salespersons, sales representatives for wholesale and manufacturing, first-line supervisors of retail sales workers, customer service representatives and heavy and tractor trailer truck drivers. Skills that were actively sought by area employers included sales, store management, cleaning, mathematics, repair, scheduling, accounting and inspection.
- Of the regional job listings in the first quarter for which educational requirements were provided, the vast majority required a bachelor's degree or a high school diploma.



INDUSTRIES WITH THE MOST JOB LISTINGS	
Industry	Listings
Hospitals	2,468
Ambulatory Health Care Services	2,072
Food Services and Drinking Places	1,760
Professional, Scientific, and Technical Services	1,659
Educational Services	1,601
Credit Intermediation and Related Activities	1,365
Food and Beverage Stores	1,079
Insurance Carriers and Related Activities	900
General Merchandise Stores	735
Accommodation	664
Administrative and Support Services	653
Nursing and Residential Care Facilities	569

OCCUPATIONS WITH THE MOST LISTINGS	
Occupation	Listings
Registered Nurses	1,514
Retail Salespersons	1,431
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	1,356
First-Line Supervisors of Retail Sales Workers	980
Customer Service Representatives	965
Heavy and Tractor-Trailer Truck Drivers	946
Software Developers, Applications	804
Combined Food Preparation and Serving Workers, Including Fast Food	699
Managers, All Other	540
Laborers and Freight, Stock, and Material Movers, Hand	495
Medical and Health Services Managers	487
Tutors	483

TOP SKILLS IN DEMAND	
Skill	Listings
Sales	2,386
Store Management	1,851
Cleaning	1,814
Mathematics	1,783
Repair	1,535
Scheduling	1,449
Accounting	1,290
Inspection	1,102
Merchandising	1,093
Business Management	1,066
Training Programs	1,037
Product Sale and Delivery	1,000

EMPLOYERS WITH SIGNIFICANT JOB LISTING ACTIVITY
Bayada Home Health Care
TD Bank
ShopRite / Wakefern
Oracle
Virtua Health
Wyzant
Lowe's Companies, Inc
Cooper University Hospital
Burger King
CVS Caremark
Kennedy Health System
Caesar's Entertainment

Source: Burning Glass Technologies, Labor Insight

Prepared by: New Jersey Department of Labor and Workforce Development, Bureau of Labor Market Information

Expansion of Ambulatory Care Centers Aides Regional Health Care Payrolls

Projects in line with the long-term trend of having more health care delivered on an outpatient basis with fewer and shorter inpatient hospital stays are underway throughout the region.

The Nemours Children's Health System will expand its services with a new \$45 million outpatient facility that broke ground in early May in Deptford Township (Gloucester County). The 65,000-sq.ft. facility, Nemours DuPont Pediatrics – Deptford, is scheduled to open in the summer of 2016. It will be equipped with a same-day, ambulatory surgery center with two operating rooms. The facility will have a staff of between 75 and 100 and offer pediatric care in 25 specialties.

In Cherry Hill Township (Camden County), Kennedy Health recently broke ground on the \$65 million Phase I renovation of Kennedy University Hospital, part of a \$200 million revitalization of the hospital campus. The initial expansion will consist of ambulatory services and space for private specialty doctors' offices. Phase II of the project, set to begin in late 2016, will see the construction of a new acute-care Patient Pavilion that will increase the capacity of private patient rooms.

In other related developments, Inspira Health Network opened its fourth urgent care center in Mantua Township (Gloucester County) late last year. Inspira's expansion of Urgent Care services will continue in 2015, including a new location in Cumberland County. The health network is currently developing a new location along Landis Avenue in the city of Vineland which will also include an office for its Occupational Health and Wellness services. It will also relocate its urgent care center and family medi-

cine office in Glassboro (Gloucester County) to a new larger space along Rowan Boulevard.

Rowan University Growth

Construction of a new building for the William G. Rohrer College of Business is underway along Rt. 322 and construction will begin in June 2015 on the expansion of the Henry M. Rowan College of Engineering. The new facilities, which will open in 2017, will enable each college to double their enrollment.

Rowan broke ground in May on a 1,400-bed, \$129 million residence hall which is at the head of Rowan Boulevard, a \$300 million redevelopment project Rowan has partnered with the Borough of Glassboro and private investors to make possible. The new mixed use development includes: a Barnes & Noble Collegiate Superstore; a Courtyard at Marriott Hotel; and student and general housing, office, retail and other space.

Those buildings are just one part of Rowan's projected growth. Expectations include increasing enrollment to 25,000 students (2014 freshman applications were up 24.5 percent), increasing sponsored research to \$100 million, building its endowment to \$500 million and increasing its operating budget to \$1 billion – all by 2023.

South Jersey Distribution Center Expands

Construction was recently started on a new 171,600 sq.-ft. distribution facility at LogistiCenter Logan in Logan Township (Gloucester County). The facility will be ideally suited for e-commerce, food and beverage

and consumer production warehousing and distribution operations. It is the latest piece of the planned sprawling industrial park. The new multi-tenant facility at 1110 Commerce Blvd. is under development, and accepting leases.

Atlantic City News

In April 2015, Bass Pro Shops fishing and outdoor megastore opened an 85,000-sq.ft. facility on a four-acre parcel located along Atlantic Avenue, creating about 200 jobs in a city still feeling the effects of the loss of roughly 8,000 jobs when the Atlantic Club, Showboat, Revel and Trump Plaza casinos closed last year.

The former Pier Shops at Caesars was recently purchased and will be rebranded as The Playground, a 500,000-sq.ft. shopping and entertainment complex. A large part of the project's focus will be on live music with the addition of 14 music venues including a 2,000-seat concert space. The boardwalk level will be transformed into a street-like promenade with small bars that will host live music. Plans also include a sports bar, bowling alley, two clubs with members-only pools, a beach club, high-end shops and more restaurants. Phase 1 was completed July 4th.

Borgata Hotel Casino & Spa is in the process of adding a 24,000-sq.ft. outdoor entertainment venue to the property and transforming existing nightclub MIXX into a new first-class upscale nightclub. An all-day music celebration opened the venue on June 13th. "Festival Park" will host big name music festivals and electronic dance music parties booked through entertainment company Live Nation. The venue will include large and small outdoor stages, VIP areas, food and beverage kiosks or food trucks, an outdoor bar, seating and game areas, BBQ and fire pits. The combined cost of \$14 million will be backed by Casino Reinvestment Devel-

opment Authority investment alternative tax payments. The project is expected to generate 147 construction jobs and \$6 million in wages.

Republic Bank's continued New Jersey Expansion

Philadelphia-based financial institution Republic Bank is planning to open its fourth and fifth New Jersey locations in Camden County. Currently operating in the Camden County municipalities of Voorhees Township, Cherry Hill Township and Haddonfield Borough at least two more Republic Bank locations have been under construction and should be open in the near future in Berlin Borough and in Evesham Township.

Shopping Mecca Coming to Region

The 370,000-sq.ft. Gloucester Premium Outlets are set to open in August in Gloucester Township (Camden County). The outlets have been under construction on a 65-acre site between Route 42 and the Black Horse Pike since August 2014. Planned tenants include Adidas, Banana Republic Factory Store, and Gap Factory Store. It was announced that the developers are expecting 90 designer name brands to open at the center, which will also include dining options, an outdoor lounge area, landscaping and green space for events.

Business Shifts in Marlton

In Marlton (Burlington County), Continuum Health Alliance, a consulting firm that helps physicians improve their clinical and financial performance, announced a layoff of 88 workers in early June. Additionally, construction management firm Hill International recently announced the closing of a headquarters, completing a move to a new base in Philadelphia. The company employed about 120 professionals at the Marlton location.

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