

Regional Focus: South Jersey

Data and analysis for the Atlantic City, Camden, Ocean City, and Vineland/Millville/Bridgeton labor areas

Regional Employment Dips Over the Year

The Southern Region's level of total nonfarm employment (not seasonally adjusted) settled at an estimated 724,200 in March 2014, a relatively small decline of 4,400 or 0.6 percent from March 2013. In comparison, statewide payrolls were reduced by 0.4 percent (-13,700 jobs) for the same period. The region and the state each experienced March-to-March increases in 2012 and 2013, following recessionary declines from 2009-2011.

Over the year, the two sectors that posted regional gains were trade, transportation and utilities (T/T/U, +1,600 or +1.1%) and professional and business services (+1,300 or +1.5%). Other services remained unchanged. All remaining sectors experienced over the year losses: leisure and hospitality (-5,400 or -5.8%); information (-1,700 or -18.3%); financial activities (-1,000 or -2.8%); educational and health services (-400 or -0.3%); manufacturing (-300 or -0.7%); construction (-200 or -0.8%) and government (-100 or -0.1%).

Statewide, T/T/U also added the most jobs over the year (+11,000 or +1.4%) with retail (+5,600 jobs, mostly food and beverage stores +3,500) and wholesale (+3,400) adding jobs. Educational and health services (+4,200, 0.7%) and other services (+800 or +0.5%) were also up since March 2013. Jobholding was down in leisure and hospitality (-9,600 jobs or -2.9% with over half of those losses coming in arts/entertainment/recreation, -5,400), construction (-6,600 or -5.2%), government (-4,700, -0.7%), information (-3,700, -4.9%), financial activities (-3,600, -1.4%) and manufacturing (-1,600, -0.7%).

Smaller Labor Areas Lead the Way

Jobholding was up over the year in the region's smallest labor areas by employment while the larger labor areas shed jobs. The Ocean City Labor Area (Cape May County), which makes up about five percent of regional employment, increased by 3,000 (+9.2%) since March 2013 to total 35,500 in March 2014. Trade, transportation and utilities was up

by 1,000 or 17.2 percent; the retail trade component added 400 (+7.7%).

Employment in the Vineland/Millville/Bridgeton Labor Area (Cumberland County) totaled 54,500 in March 2014, an increase of 200 or 0.3 percent over the year. T/T/U was the job growth leader (+900 jobs or +7.4%) due primarily to increased hiring in the transportation, warehousing and utilities sector. Manufacturing was also up since March 2013 (+200 or +2.5%). Educational and health services shed the most jobs (-500 jobs or -5.2%) followed closely by leisure and hospitality (-400, -11.4%).

Change in Nonfarm Employment March 2013 - March 2014p (not seasonally adjusted)

	Region		State	
	Net	%	Net	%
Total Nonfarm Employment	-4,400	-0.6	-13,700	-0.4
Private Sector	-4,300	-0.7	-9,000	-0.3
Construction ¹	-200	-0.8	-6,500	-5.0
Manufacturing ¹	-300	-0.7	-1,600	-0.7
Trade, Trans. & Utilities	1,600	1.1	11,100	1.4
Information ¹	-1,700	-18.3	-3,700	-4.9
Financial Activities ¹	-1,000	-2.8	-3,600	-1.4
Prof. & Business Svcs. ¹	1,300	1.5	-100	0.0
Ed. & Health Svcs.	-400	-0.3	4,200	0.7
Leisure & Hospitality	-5,400	-5.8	-9,600	-2.9
Other Services ¹	0	0.0	800	0.5
Government	-100	-0.1	-4,700	-0.7

Source: NJLWD, Current Employment Statistics

¹Employment does not include data for Cape May County



Regional Focus is a quarterly publication of the New Jersey Department of Labor Division of Labor Market and Demographic Research. For questions regarding the material in this publication contact Michael Dugan at (609)633-6425 or email michael.dugan@dol.state.nj.us

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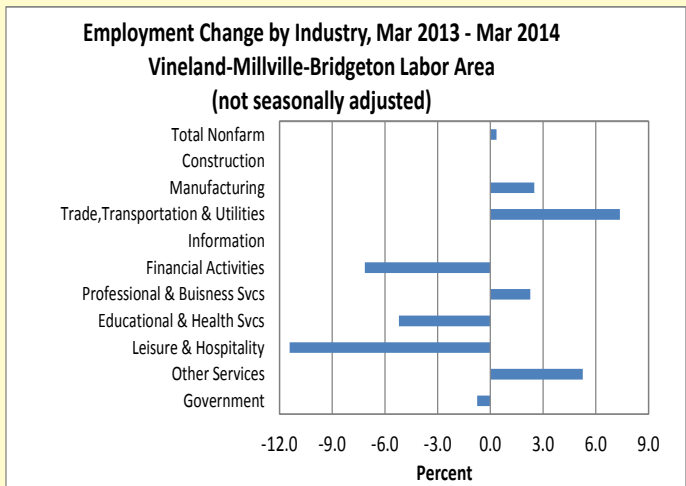
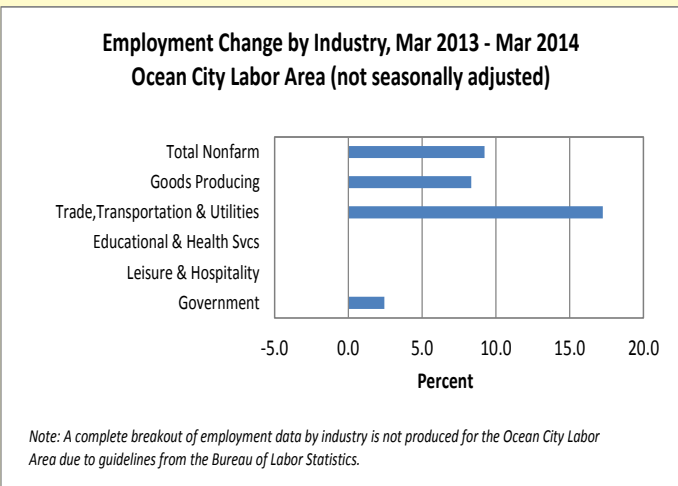
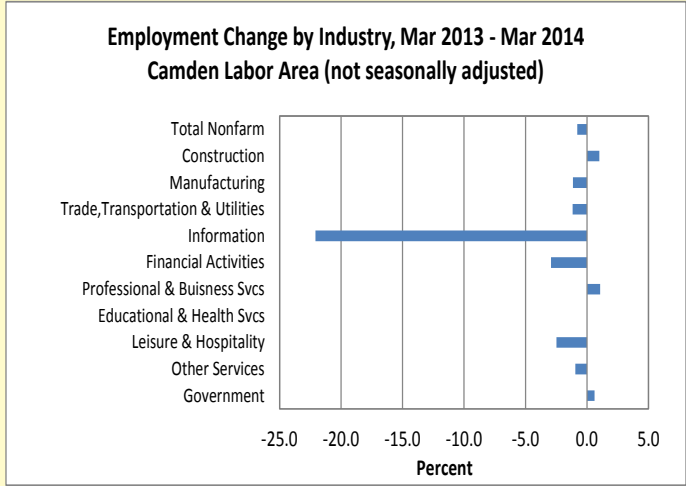
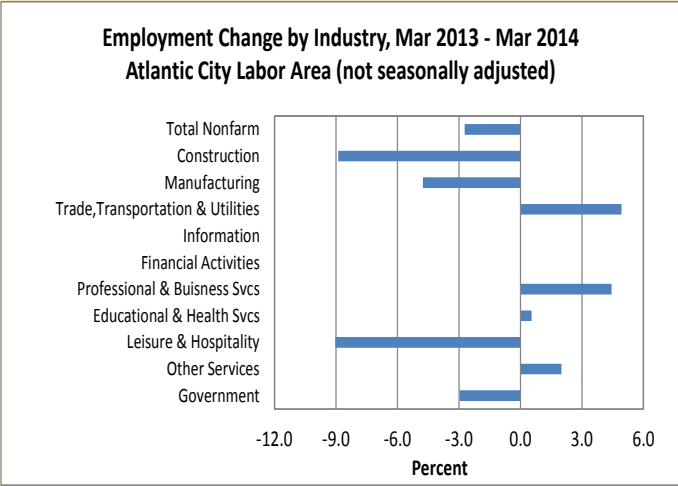
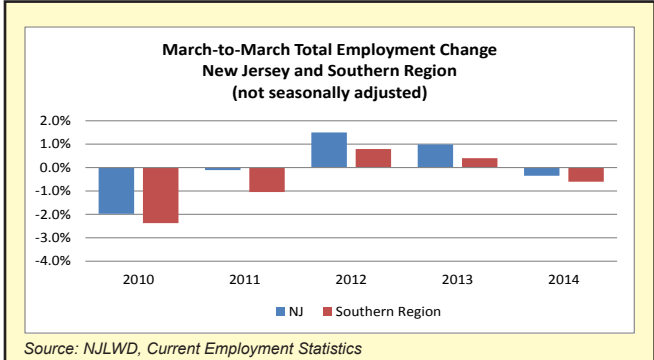
The Camden (Burlington, Camden and Gloucester counties, -4,000 or -0.8%) and Atlantic City (Atlantic County, -3,600 or -2.7%) labor areas each lost employment, settling at March 2014 unadjusted levels of 502,700 and 128,500, respectively.

In the Camden Labor Area, job losses occurred in information (-1,700, -22.1%), T/T/U (-1,300, -1.2%), leisure & hospitality (-1,000, -2.5%), financial activities (-900 or -2.9%) and manufacturing (-400, -1.1%) while professional & business services (+800 jobs, +1.1%); government (+500, 0.6%) and construction (+200 or +1.0%) were up over the 12-month period.

In the Atlantic City Labor Area, casino hotel employment (-4,600 or -15.4%) led the decline in leisure and hospitality (-4,000, -9.0%). The main cause was the mid-January 2014 closing of the Atlantic Club Casino/Hotel resulting in the loss of 1,600 jobs. However, food services/drinking places added 900 jobs as area businesses have been increasing non-gaming attractions. Losses also occurred in government (-700, -3.0%) and construction (-400, -8.9%). T/T/U led the gains (+1,000 or +4.9%) with retail trade being the main contributor to employment growth (+800, +5.3%). Professional and business services also had a notable increase (+400 or +4.4%).

Total Nonfarm Employment (unadjusted March data, employment in thousands)						
	2009	2010	2011	2012	2013	2014
New Jersey	3,874.0	3,797.4	3,793.3	3,850.2	3,888.2	3,874.5
Southern Region	745.3	727.6	720.0	725.7	728.6	724.2
Atlantic City Labor Area (Atlantic County)	137.4	134.7	131.8	133.9	132.1	128.5
Camden Labor Area (Burlington, Camden, Gloucester counties)	515.2	501.6	498.6	501.4	506.7	502.7
Ocean City Labor Area (Cape May County)	33.4	32.9	32.4	32.6	32.5	35.5
Vineland-Millville-Bridgeton Labor Area (Cumberland County)	59.3	58.4	57.2	57.8	57.3	57.5

Source: NJLWD, Current Employment Statistics

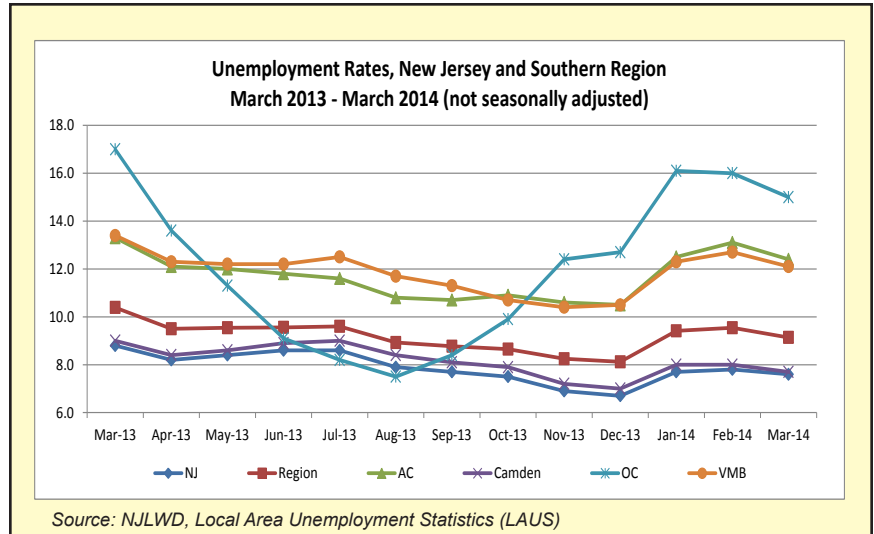


Source: NJLWD, Current Employment Statistics

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

- From March 2013 to March 2014, the not seasonally adjusted unemployment rate for both the Southern Region and New Jersey improved. The rate for the region was down from 10.4 percent in March 2013 to 9.1 percent in March 2014; statewide, the rate declined to 7.6 percent in March 2014 from 8.8 percent in March 2013. There was also a reduction in the labor force in both respective areas. The region's labor force settled at 894,100, down by 20,300 (or -2.2%) since March 2013. In comparison, New Jersey's labor force was reduced by a lesser rate (-1.4% or -61,500).



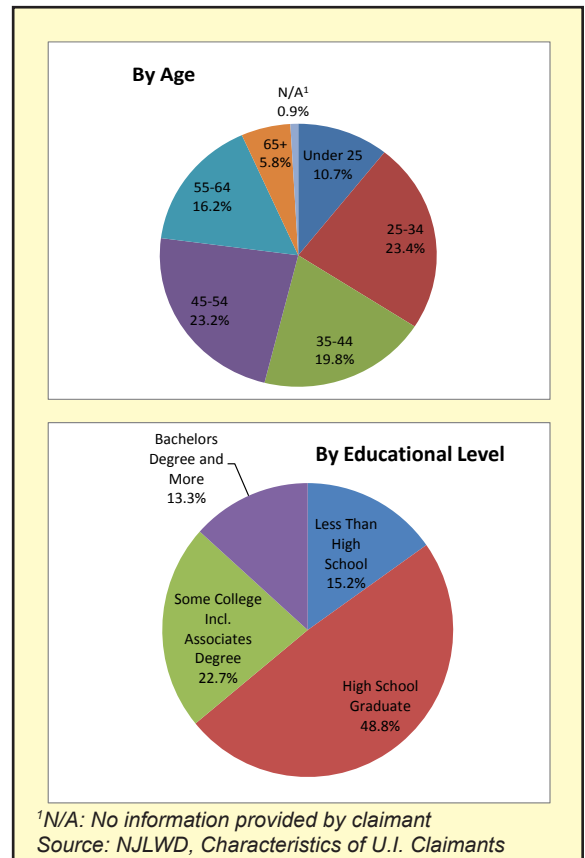
- Ocean City (Cape May County) was the region's only labor area to experience an increase in the size of its labor force over the year (+1,700). The area's March 2014 unemployment rate was 15.0 percent, a decrease of 2.0 percentage points from its March 2013 unemployment rate. Ocean City's unemployment rate remained the highest in the region as the area is still in its "off season" as employment in the leisure and hospitality sector has yet to begin to gear up for the summer tourism season.
- With a March 2014 unemployment rate of 7.7 percent, the Camden Labor Area had the lowest unemployment rate in the region and was 1.3 percentage point lower than the March 2013 rate. The Camden area saw drops in both the number of employed and unemployed over the year.

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/lfst_index.html

CHARACTERISTICS OF NEW JERSEY'S INSURED UNEMPLOYED SOUTHERN REGION, FIRST QUARTER 2014

CLAIMANTS BY OCCUPATIONAL GROUP		
	Number	Percent
Management	4,383	6.2
Business and financial	2,170	3.1
Professional and related	6,021	8.5
Services	17,746	25.0
Sales and related	5,362	7.6
Office and administrative support	8,283	11.7
Farming, fishing and forestry	701	1.0
Construction and extraction	8,137	11.5
Installation, maintenance & repair	2,811	4.0
Production	5,989	8.5
Transportation & material moving	8,838	12.5
Military	358	0.5

- In the first quarter 2014, nearly 28 percent of New Jersey's insured unemployed claiming continued benefits resided in the Southern Region. The region's claimants totaled 70,900, down by 20,965 claimants (-29.6%) from the first quarter of 2013. In comparison, there were 89,100 (-34.7%) less claimants statewide during the first quarter of 2014.
- Leisure & hospitality accounted for 20.4 percent of regional claimants (vs. 12.5% statewide) during the first quarter; nearly half of the region's claimants were in Atlantic County (49.3%). By occupational group, services accounted for a higher proportion of claimants in the region than in the state (25.0% vs. 19.6%, respectively).



REGIONAL POPULATION ESTIMATES

Intercensal Population Estimates for New Jersey and the Southern Region: 2010 to 2013

	Population		Change	
	2010	2013	Number	Percent
New Jersey	8,791,909	8,899,339	107,430	1.2%
Southern Region	1,845,480	1,848,214	2,734	0.1%
Atlantic	274,549	275,862	1,313	0.5%
Burlington	448,731	450,838	2,107	0.5%
Camden	513,666	512,854	-812	-0.2%
Cape May	97,265	95,897	-1,368	-1.4%
Cumberland	156,898	157,332	434	0.3%
Gloucester	288,288	290,265	1,977	0.7%
Salem	66,083	65,166	-917	-1.4%

Source: U.S. Census Bureau, Population Division

- Over the most recent one-year period from 2012 to 2013, the region saw its population decline by 2,330 residents. Five of the region's counties (Camden, Burlington, Cumberland, Salem and Cape May) experienced a population decline. The two counties that added residents were Atlantic and Gloucester.
- The population of the seven-county Southern Region totaled 1,848,214 residents in 2013 which represented 20.8 percent of the total population statewide. Since 2010 the region's population remained relatively stable increasing by only 2,734 residents. The region experienced a positive gain from net international migration since 2010 (+15,327 residents) but lost residents through domestic migration (-29,669); natural increment, or births minus deaths, resulted in a gain of 17,640.
- Four counties increased their population from 2010 to 2013 (Atlantic, Burlington, Cumberland and Gloucester) contributing to an overall 0.1 percent rise while three counties experienced (Camden, Cape May and Salem) a decline in their populations. The Southern Region is home to the only two counties in the state that still had less than 100,000 residents — Salem (65,166) and Cape May (95,897).
- Statewide, Cape May County (-1,400 or -1.4%) had the second largest numeric decrease this century (behind only Sussex County -2,900 or -1.9%). Cape May was the only county to suffer from natural decrease (1,100 more deaths than births) between 2010 and 2013.

REGIONAL JOB OUTLOOK JANUARY 2014 - MARCH 2014

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
Camden	8,320
Burlington	6,554
Atlantic	3,415
Gloucester	2,635
Cumberland	1,266
Cape May	908
Salem	642

During the most recent quarter, southern region employers in food services and drinking places, ambulatory health care services, hospitals, credit intermediation and related activities, and professional, scientific and technical services exhibited the most occupational demand based on online job listing activity.

Concentrated in Camden and Burlington counties, employers indicated they were interested in filling positions for heavy and tractor trailer truck drivers, retail salespersons, registered nurses, sales representatives, supervisors of retail sales workers and customer service representatives. Skills that were actively sought by area employers included sales, repair, cleaning, scheduling, mathematics and accounting.

OCCUPATIONS WITH THE MOST LISTINGS

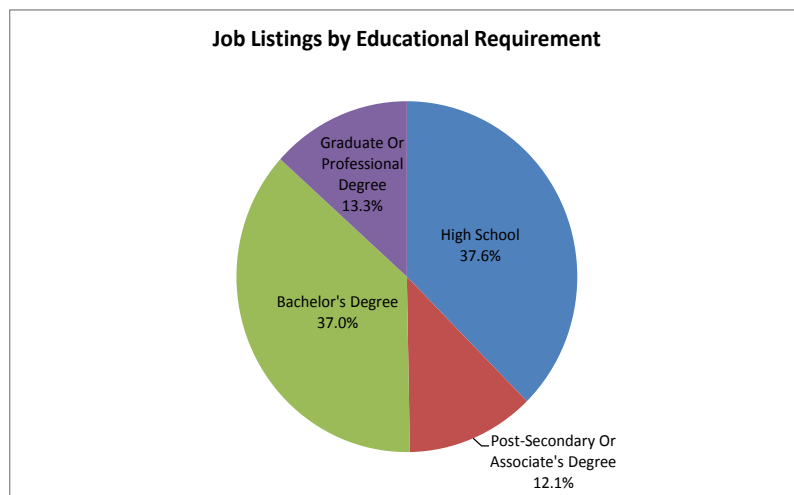
Occupation	Listings
Heavy And Tractor-Trailer Truck Drivers	1,253
Retail Salespersons	1,072
Registered Nurses	785
Sales Reps, Wholesale & Manufacturing, Excl. Technical & Scientific Products	764
First-Line Supervisors Of Retail Sales Workers	651
Customer Service Representatives	583
Supervisors Of Food Prep & Serving Workers	368
Medical And Health Services Managers	368
Food Prep & Serving Workers, Incl. Fast Food	356
Laborers & Freight, Stock, & Material Movers	346
Software Developers, Applications	328
Maintenance And Repair Workers, General	306

INDUSTRIES WITH THE MOST JOB LISTINGS

Industry	Listings
Food Services And Drinking Places	1,176
Ambulatory Health Care Services	1,171
Hospitals	1,088
Credit Intermediation And Related Activities	964
Professional, Scientific, And Technical Services	853
General Merchandise Stores	720
Educational Services	708
Insurance Carriers And Related Activities	644
Truck Transportation	560
Accommodation	538
Nursing And Residential Care Facilities	524
National Security And International Affairs	420

TOP SKILLS IN DEMAND	
Skill	Listings
Sales	1,505
Repair	1,132
Cleaning	967
Scheduling	941
Mathematics	935
Accounting	714
Merchandising	690
Product Sale and Delivery	648
Patient Care	631
Inspection	576
Personal Computers	573
Decision Making	547

EMPLOYERS WITH SIGNIFICANT JOB LISTING ACTIVITY
TD Bank
Sears
Lowe's Companies, Inc
Lockheed Martin Corporation
Genesis Healthcare Corporation
Cooper University Hospital
Our Lady Of Lourdes Health System
Bayada Home Health Care
Caesar's Entertainment
McDonald's
Burlington Coat Factory
US Air Force



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.

Source: Burning Glass Technologies, Labor Insight

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

Camden County Developments

In the city of Camden, a groundbreaking for the KIPP (Knowledge is Power Program) Cooper Norcross Academy occurred in March 2014. The school will be New Jersey's first renaissance school - a program established under the Urban Hope Act to provide quality education and college preparation to students in the school districts of Camden, Newark and Trenton. Much like a charter school, renaissance schools are publicly funded and privately managed. However, renaissance schools must be approved by the local school board. The new school will serve more than 1,000 students from Pre-K to 8th grade beginning in September 2014.

In Cherry Hill, a Whole Foods supermarket will open in mid-June at the Ellisburg Shopping Center along Route 70. The Cherry Hill store will be Whole Foods' 11th in the state, and second (Marlton) in the southern region of New Jersey. Also at Ellisburg, Pet Supplies Plus is due to open in mid-summer and a Honeygrow restaurant is scheduled to start serving diners locally sourced and seasonal food by late summer.

Rowan's on the Radar

Rowan University and Lockheed Martin are collaborating on a strategic partnership to develop new radar systems in support of national defense. The research

will be done at Rowan's South Jersey Technology Park located about one mile away from its main (Glassboro) campus. As research expands, a planned second Technology Park building would be used.

The partnership will benefit both parties involved by enhancing the student's education as well as providing Lockheed Martin with a skilled and talented workforce who will start their careers with valuable experience.

Expansion at Atlantic City International Airport

In April, United Airlines became the second carrier to serve the Atlantic City International Airport (besides Spirit). In order to help attract additional airline service, a \$25 million expansion was recently completed at the airport. This expansion included additional terminal space, three additional passenger gates and a 1,400-car parking garage. The additional flights are anticipated to bring more business travelers and overnight tourists to the area.

Following up on that launch of service, the Casino Reinvestment Development Authority (CRDA) stated the airport will use a \$5 million "Tourism Market Expansion Project" grant in an effort to attract additional airlines.

Tropicana Transformation

The Tropicana casino/hotel recently announced a \$35 million renovation plan which includes a high-tech light show on the boardwalk. Additional improvements include a new fitness club, expanded retail space and a complete renovation of more than 400 hotel rooms. Construction could begin as soon as this summer and be complete by the end of 2015, reportedly with the help of nearly \$19 million in state funding.

Burlington County Developments

Prince Global Sports, a maker of tennis racquets, plans to move its corporate headquarters from Bordentown to the Atlanta, Georgia area, resulting in the loss of about 50 jobs.

Ocean Spray is preparing to close its Bordentown cranberry juice plant and relocate near Allentown, Pennsylvania. The Bordentown facility has 138 employees and the first layoffs are slated for early May.

In Delanco, Dietz and Watson, a family-owned company that produces hot dogs and deli meats, was awarded \$30 million in state assistance to remain in the state and rebuild after its distribution center was destroyed by a fire in September 2013. They will receive \$3 million in tax credits every year for the next 10

years. The company plans to construct a 16,000-sq. ft. warehouse, a 25,000-sq. ft. building for its corporate offices and a 16,000-sq. ft. garage.

Region Fosters Growth in Life Sciences Industry

Southern NJ is experiencing growth in the life sciences industry cluster. According to the latest annual Quarterly Census of Employment and Wages (QCEW) data, there were 11,600 workers employed in the region. While the medical devices industry added the most jobs since 2007, pharmaceuticals (+23.3%) was the fastest-growing between 2007 and 2012. In addition, the number of pharmaceutical establishments in the region was up over this 5-year period.

To ensure this cluster continues to grow and thrive in the region, various educational institutions have initiatives which are underway. Some recent projects include:

- Rowan University allocated \$5 million to establish a new venture capital fund called the Rowan Venture Fund with the purpose of promoting "early stage" research initiatives. Last year, Rowan received the designation of being the state's second comprehensive public research institution and this new fund should help foster additional research in areas such as life sciences.

- Rutgers University is building a \$62.5 million nursing and science building in Camden. This 100,000-sq. ft. educational and research facility is expected to be completed in mid-2016.

Summer Shore Rental Report

Even though it's still early in the rental season, a significant number of people are already planning their summer vacations along the shore area, probably as a result of this year's long, cold winter. It was reported that Southern Region real estate brokers and agents, especially in Atlantic and Cape May counties, feel optimistic and stated that bookings are up over last year with some up over 25 percent. In one instance, in Ocean City, with its sheer volume (as many as 10,000 by some estimates) of rental units, the season is off to a great start.

One local realtor stated rentals are up (23%) over this time last year on the 4,000 properties the agency brokers for rent. In Avalon, bookings are about 18 percent ahead at an agency which offers shore listings that range from a \$600 per week two-bedroom one-bath condo in Wildwood to a six-bedroom, \$18,000-a-week beachfront home in Avalon.