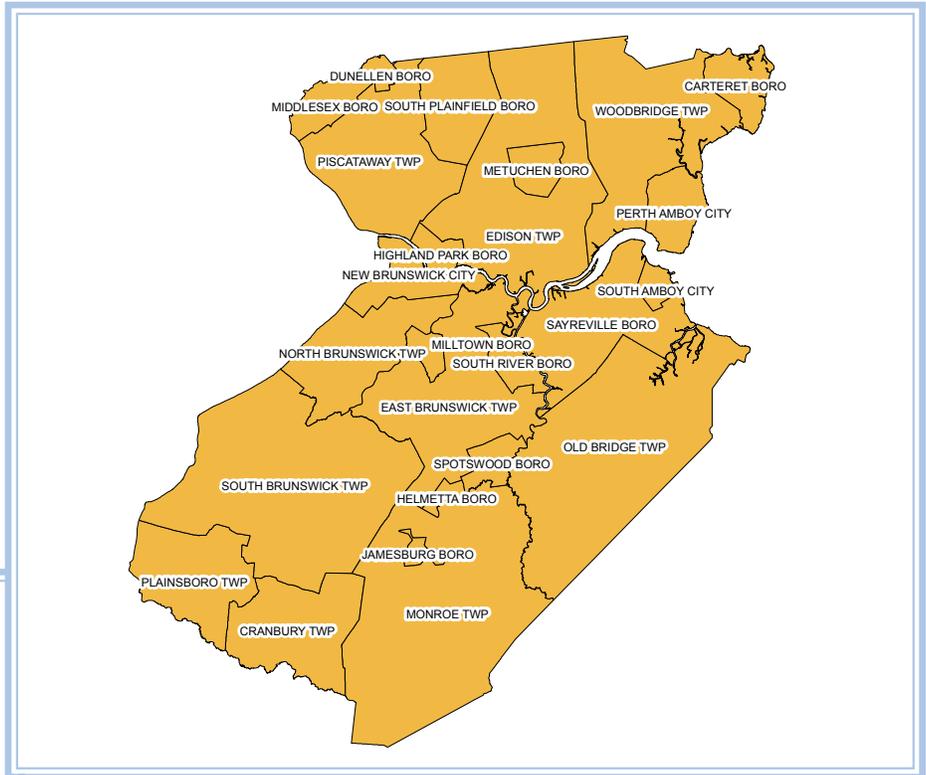
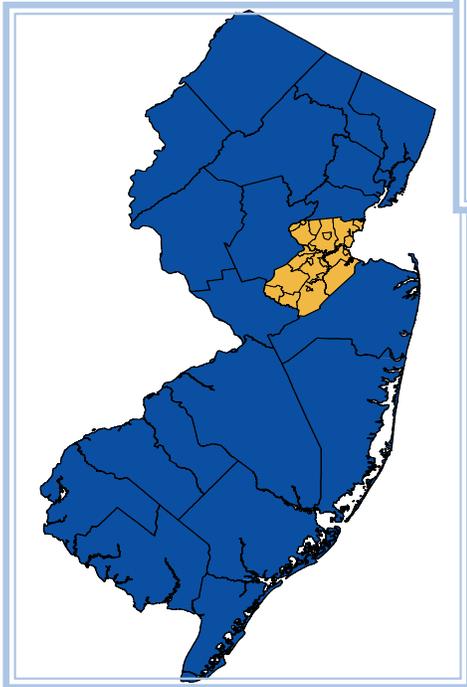


County Community Fact Book



Middlesex County Edition

Preface

The Regional Community Fact Book for Middlesex County provides a snapshot of its people and its economy. Included are facts and figures on current industry trends, population, unemployment and income. The Fact Book also provides a look into the future by providing the latest population, labor force, industry and occupational projections.

The Regional Community Fact Book series is meant to be a reference for use in local and regional economic development planning and for employment and training providers. Updates to the Fact Book series will be published as more current data becomes available.

Acknowledgements

This publication was prepared by Vin Samuel, Scott Paken and Frank Ferdetta of the Bureau of Labor Market Information, Division of Workforce Research and Analytics. Layout was done by JoAnne Caramelo.

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Population (July 1, 2012 estimate): 823,041

Change from Census 2000: +72,879 or +9.7%

Percent of New Jersey Total: 9.3%

Total Private Sector Employment (2012 Average): 330,439

Percent of New Jersey Total: 10.3%

Change From 2007: -24,584

Largest Industry (2012 Average): Trade, Transportation and Utilities

Employment: 95,221

Percent of Total County Employment: 28.8%

Private Sector Wage (2012 Average Annual): \$59,688

Percent of New Jersey Average Annual Wage: 102.7%

Change From 2007: +\$4,115

Industry With Highest Average Annual Wage (2012):

Financial Activities: \$98,207

Per Capita Personal Income (2012): \$52,108

Percent of New Jersey Per Capita Income: 94.8%

Rank Among New Jersey Counties: 10

**Number of Unemployment Insurance
Claimants (2013 Annual Average): 7,438**

Unemployment Rate: (2013 Annual Average): 7.4%

5-Year High (2010): 8.7%

5-Year Low (2013): 7.4%

New Jersey Rate (2013): 8.2%

Building Permits (Total Residential, 2012): 1,307

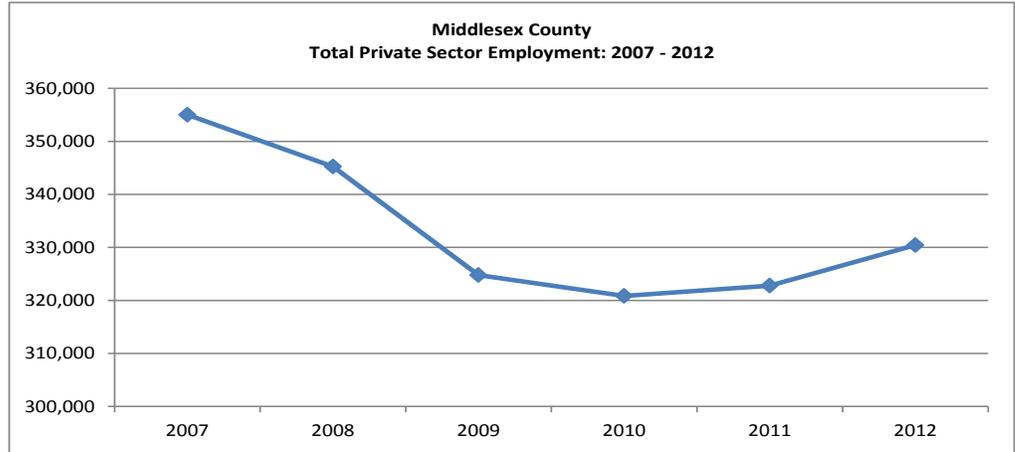
Rank Among New Jersey Counties: 4

Building Permits (Single-Family Residential, 2012): 738

Rank Among New Jersey Counties: 1

*County
Snapshot*

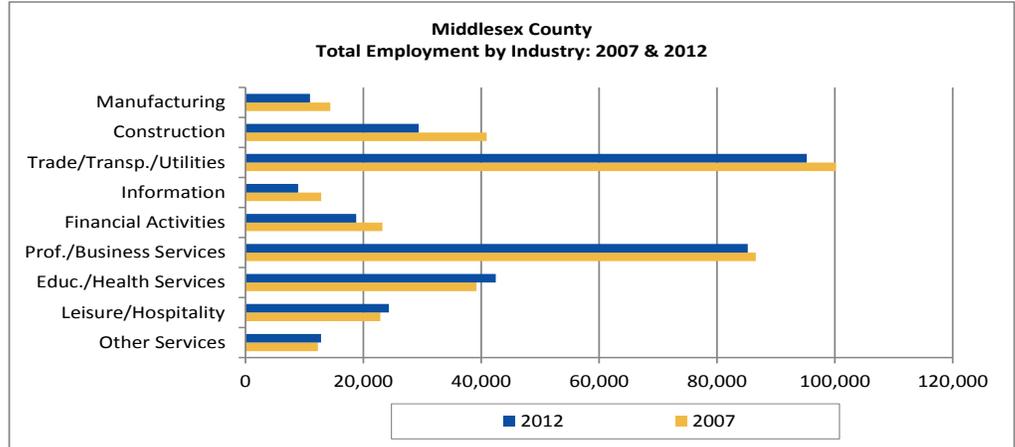
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Source: NJLWD, Quarterly Census of Employment and Wages

- From 2007 to 2012, total private sector employment in Middlesex County declined by 24,584 or 6.9 percent to settle at 330,439 jobs. In comparison, New Jersey's private sector jobholding declined by 4.7 percent over the same time period. The county's payrolls accounted for about 10.0 percent of the state's private sector employment each year during the 2007 – 2012 period.

Employment

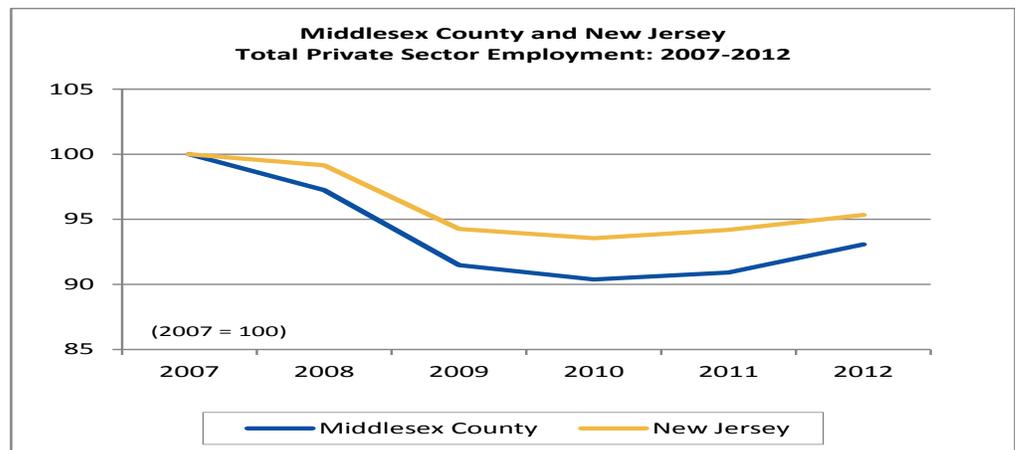


Source: NJLWD, Quarterly Census of Employment and Wages

- Trade, transportation and utilities, Middlesex County's largest employment sector, accounted for an average of 28.8 percent of county employment and 11.7 percent of the trade, transportation and utilities jobs statewide. County employment in this sector benefits from the many distribution centers in the county. Professional and business services (25.8%) and educational and health services (12.8%) ranked second and third, respectively, during the year. The manufacturing industry (8.9%) ranked fourth in 2012; in 2007, manufacturing ranked third and accounted for 11.5 percent of countywide employment.

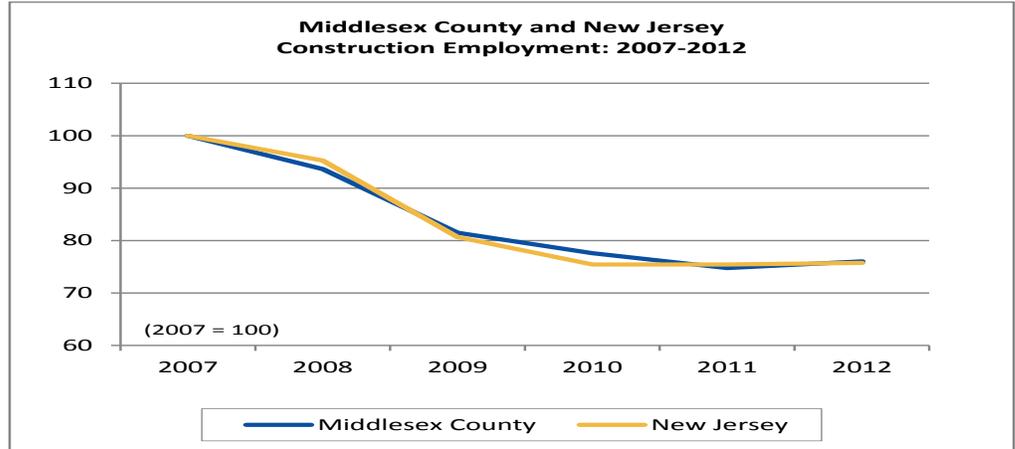
Industry Trends

- With an increase of 8.2 percent, educational and health services was the fastest growing employment sector in Middlesex County from 2007 to 2012. The county added jobs in this sector at a slightly slower rate than the state (+8.7 percent) over the same period. Middlesex County payrolls in educational and health services benefit from the many hospitals and major medical facilities located in the county.
- Leisure and hospitality posted a 6.4 percent increase to rank second in job growth in Middlesex County from 2007 to 2012. The county's payroll expansion in leisure and hospitality was nearly 4 times faster than in New Jersey where jobholding grew by only 1.8 percent during the same period.
- Employment in other services increased in Middlesex County by 4.4 percent from 2007 through 2012. On the contrary, this sector's employment increased by only 0.7 percent statewide, over the same period. Establishments within this sector include companies doing repair work or providing personal services as well as religious, professional, political, social and civic organizations.
- With 95,221 jobs in 2012, the trade, transportation and utilities sector was the largest industry in Middlesex County. However, the county saw a decline of 5.0 percent in jobholding in this sector from 2007 to 2012. In comparison, employment in trade, transportation and utilities declined by 6.3 percent statewide from 2007 to 2012.
- Middlesex County's employment in professional and business services was down by 1,368 or 1.6 percent from 2007 to 2012 while statewide, payrolls posted a slight gain (+0.9%). County jobholding in the sector saw a recessionary loss of 9,907 or 11.4 percent between 2007 and 2010. Since 2010, the sector's payrolls began to improve posting a gain of 8,539 or 11.1 percent.



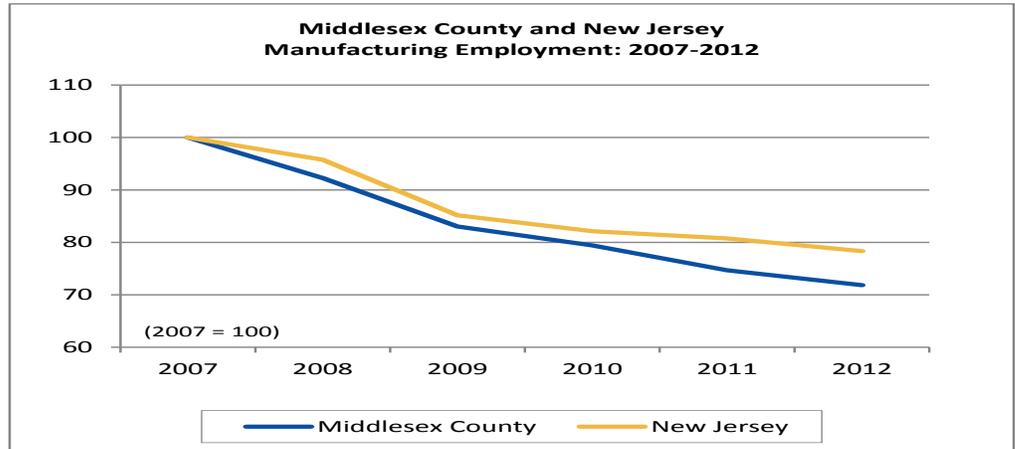
Source: NJLWD, Quarterly Census of Employment and Wages

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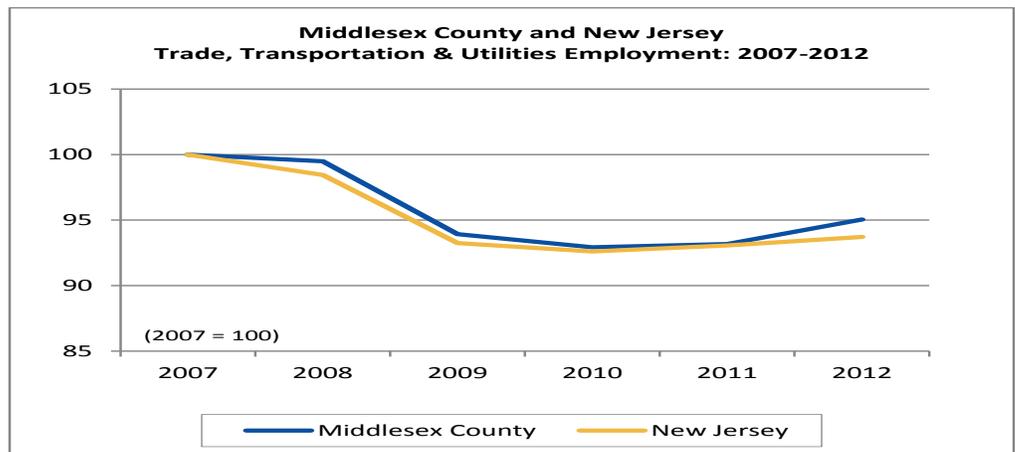


Source: NJLWD, Quarterly Census of Employment and Wages

Industry Trends



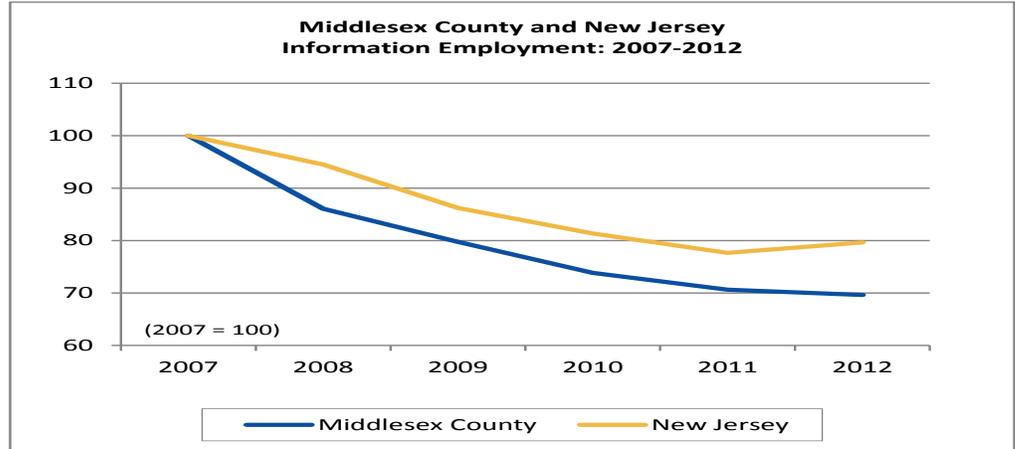
Source: NJLWD, Quarterly Census of Employment and Wages



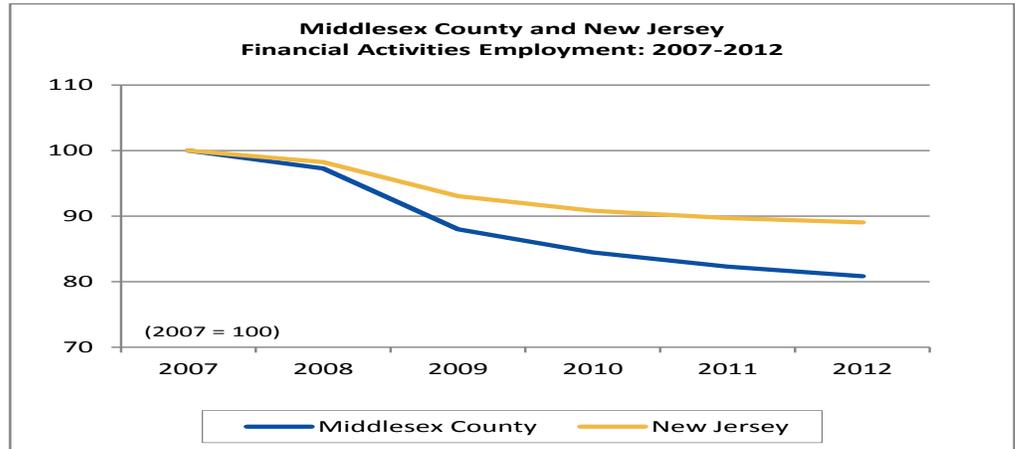
Source: NJLWD, Quarterly Census of Employment and Wages

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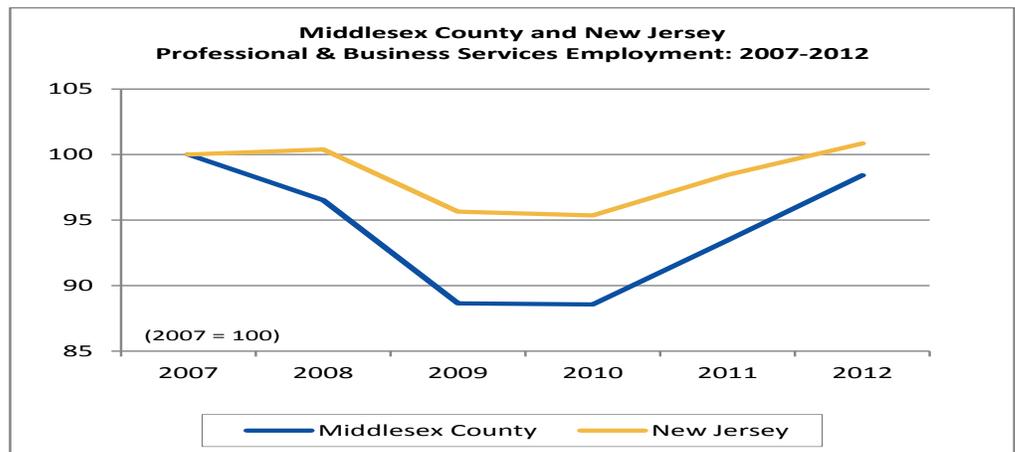
Industry Trends



Source: NJLWD, Quarterly Census of Employment and Wages



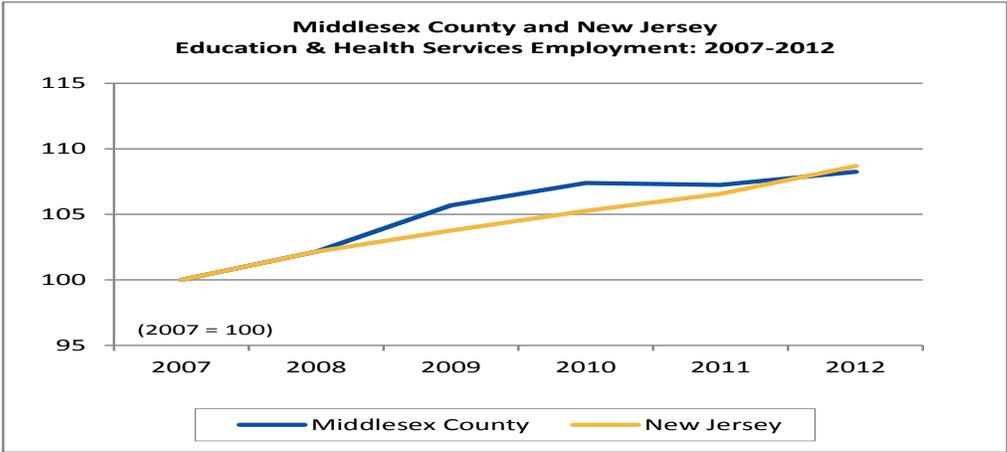
Source: NJLWD, Quarterly Census of Employment and Wages



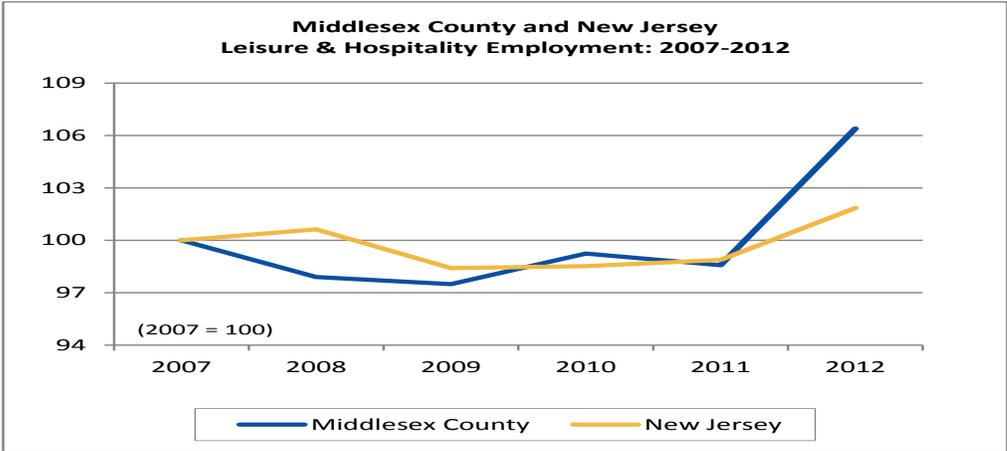
Source: NJLWD, Quarterly Census of Employment and Wages

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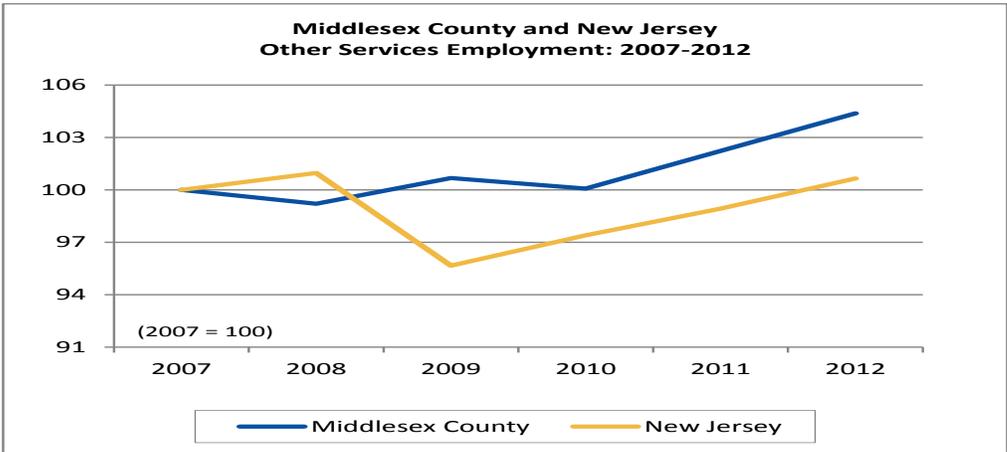
Industry Trends



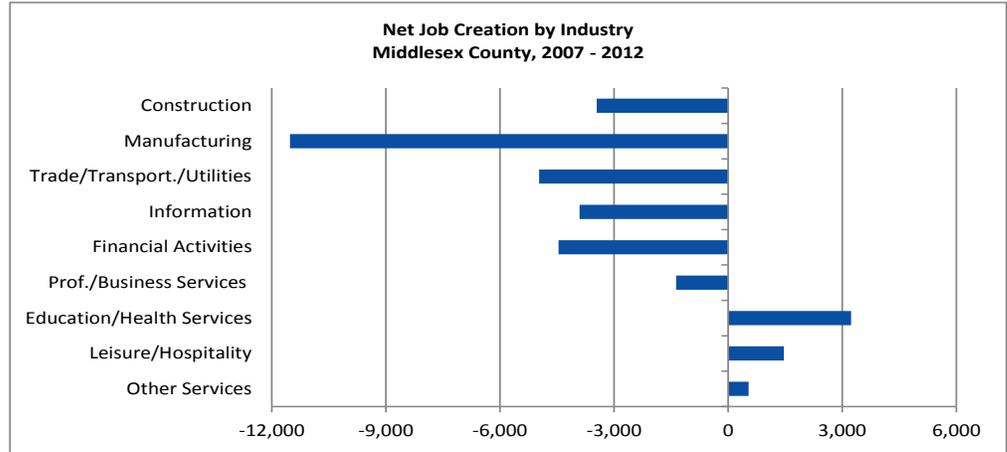
Source: NJLWD, Quarterly Census of Employment and Wages



Source: NJLWD, Quarterly Census of Employment and Wages



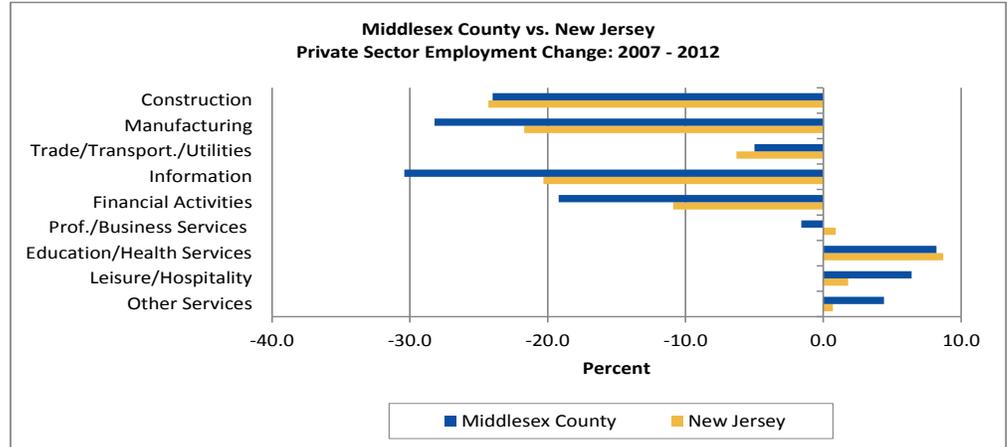
Source: NJLWD, Quarterly Census of Employment and Wages



Source: NJLWD, Quarterly Census of Employment and Wages

- Educational and health services posted the largest job gain (+3,235 jobs) in Middlesex County for the period beginning with 2007 and ending in 2012. Jobholding in this sector increased slower in the county (+8.2%) than at the state level (+8.7%). In the county, the other sectors that gained employment over the period were leisure and hospitality (+1,464 jobs or +6.4%) and other services (+538 jobs or +4.4%).

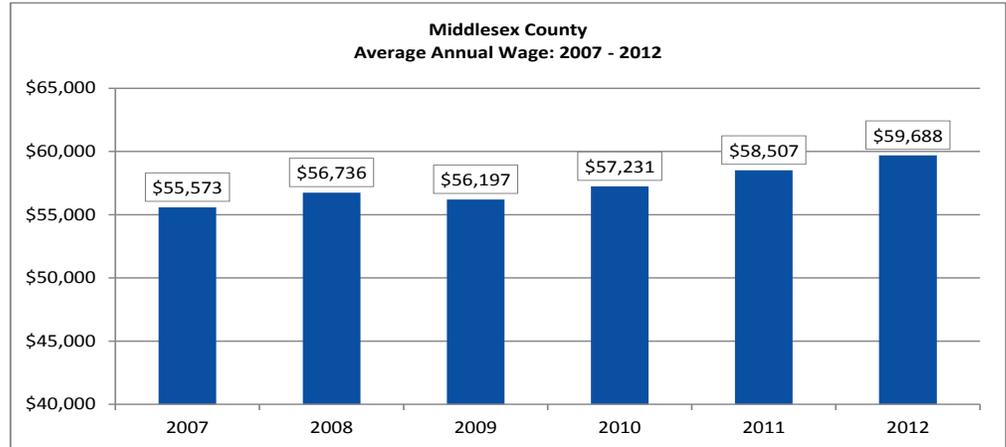
Employment Gains and Losses



Source: NJLWD, Quarterly Census of Employment and Wages

- Since 2007 financial activities posted a steeper decline in Middlesex County (-19.2%) than at the statewide level (-10.9%). Although the state and county both shed jobs in each year of the period, the rate of job loss began to slow in 2010.

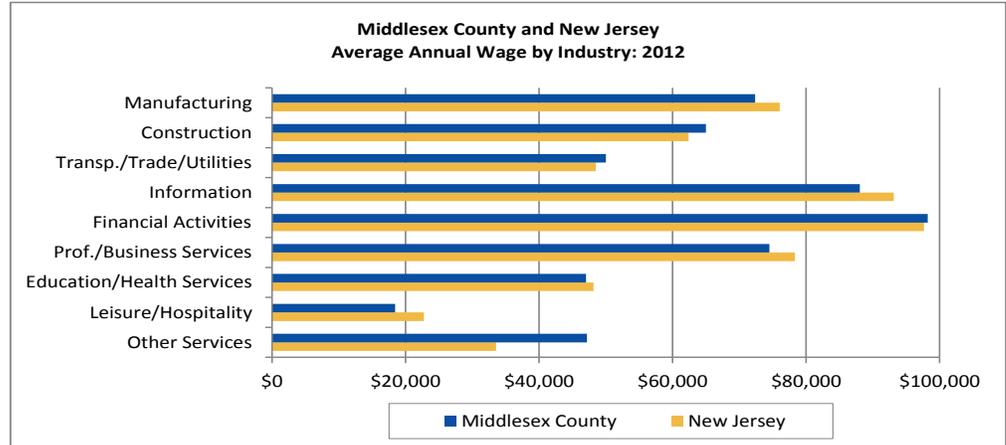
Middlesex County Community Fact Book



Source: NJLWD, Quarterly Census of Employment and Wages

- Since 2007, the annual average private sector wage in Middlesex County increased by \$4,115 or 7.4 percent, to reach \$59,688 in 2012.
- The county's annual average wage exceeded the state's annual average wage (\$58,093) in 2012.
- The steep recessionary decline in jobholding that occurred in 2009 was responsible in part for a slight drop in the county's annual average wage. Since 2009, the county's average annual wage has risen each year.

Wages

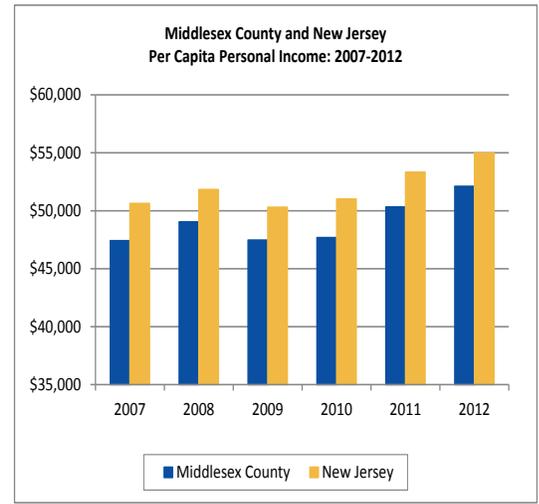


Source: NJLWD, Quarterly Census of Employment and Wages

- Financial services continues to have the highest annual average wage (\$98,207) in Middlesex County during 2012. The information, professional and business services, manufacturing, and construction sectors also had average annual wages above \$60,000. Leisure and hospitality paid the lowest average annual wage (\$18,446) due in part to the part-time and seasonal nature of many of the jobs.

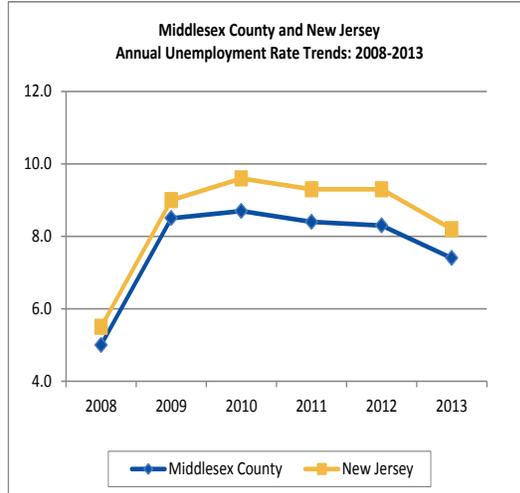
Per Capita Personal Income

- Middlesex County's per capita personal income reached \$52,108 in 2012 reflecting an increase of \$4,690 or 9.9 percent from 2007. In 2012, Middlesex County's per capita personal income was 94.8 percent of the state's average (\$54,987) and 119 percent of the national average (\$43,735).
- Middlesex County's per capita personal income ranked tenth in the state and 247 out of the 3,113 counties in the United States in 2012.
- Personal income is made up of three components: net earnings, dividends/interest/rent, and transfer payments (welfare benefits, unemployment insurance, and retirement/other including social security and veteran's benefits). In Middlesex County, 71.9 percent of total personal income (TPI) came from net earnings, 14.9 percent from dividends/interest/rent, and 13.1 percent was derived from transfer payments during 2012.



Source: U.S. Bureau of Economic Analysis

Unemployment Rates



Source: NJLWD, Local Area Unemployment Statistics

17,900 or 4.2 percent due in part to an increase in population over the same time period. In comparison, New Jersey's labor force increased by 29,200 or 0.6 percent since 2008.

- From 2008 through 2013, Middlesex County's unemployment rate jumped by 3.7 percentage points to reach 8.7 percent in 2010. This increase in the unemployment rate is a reflection of the economic recession that began in December 2007. Since 2010 as economic conditions began to improve the unemployment rate has steadily declined to reach its current level of 7.4 percent. The county's unemployment rate has remained below that of the state each year during the most recent five year period (2008-2013).
- Between 2008 and 2013, Middlesex County's labor force expanded by

Middlesex County Community Fact Book

Characteristics of the Unemployed New Jersey vs. Middlesex County: 2013

Category	Middlesex County		New Jersey	
	Annual Average	Percent of Total	Annual Average	Percent of Total
Total Insured Unemployed	7,438	100.0%	83,055	100.0%
By Gender				
Male	4,197	56.4%	46,865	56.4%
Female	3,241	43.6%	36,190	43.6%
By Race				
White	4,276	57.5%	50,627	61.0%
Black	1,067	14.3%	16,476	19.8%
Asian	733	9.9%	3,097	3.7%
Other	1,362	18.3%	12,855	15.5%
By Ethnicity				
Hispanic	1,852	24.9%	17,438	21.0%
Not Hispanic	4,855	65.3%	56,860	68.5%
Chose Not To Answer	731	9.8%	8,757	10.5%
By Age of Claimant				
Under 25	662	8.9%	7,403	8.9%
25 through 34 years	1,639	22.0%	19,036	22.9%
35 through 44 years	1,563	21.0%	16,857	20.3%
45 through 54 years	1,770	23.8%	19,569	23.6%
55 through 64 years	1,324	17.8%	14,260	17.2%
65 years and over	480	6.5%	5,930	7.1%
By Industry				
Construction	722	9.7%	8,542	10.3%
Manufacturing	612	8.2%	5,665	6.8%
Trade, Transportation, Utilities	1,666	22.4%	16,788	20.2%
Wholesale Trade	466	6.3%	4,163	5.0%
Retail Trade	749	10.1%	8,858	10.7%
Information	169	2.3%	1,432	1.7%
Financial Activities	346	4.7%	4,061	4.9%
Professional & Business Services	1,865	25.1%	16,656	20.1%
Educational and Health Services	746	10.0%	10,376	12.5%
Leisure and Hospitality	456	6.1%	8,712	10.5%
Other Services	192	2.6%	2,209	2.7%

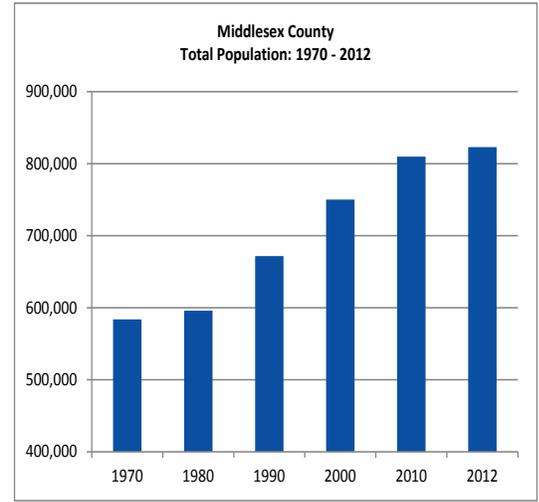
Source: NJLWD

- In 2013, there were 7,438 Middlesex County residents who filed for unemployment benefits, or 8.9 percent of claimants statewide. The number of persons filing for unemployment compensation benefits in Middlesex County was down by 1.2 percent between 2012 and 2013. The construction (-11.1%), leisure & hospitality (-10.6%), trade, transportation & utilities and educational & health services (both -5.4%) industries had the largest percentage declines in claimants over the year.
- A Middlesex County resident filing for unemployment benefits in 2013 was most likely to be a non-Hispanic, white male between the ages of 45 and 54 formerly employed in the professional and business services or trade, transportation and utilities sectors.

Characteristics of the Unemployed

Middlesex County Community Fact Book

- Since 1970, Middlesex County's population increased by 239,228 persons to reach 823,041 residents in 2012, growing at a rate of 41.0 percent. Middlesex County experienced robust population growth in the 1990s (+12.7%) and 2000s (+11.7%) adding over 75,000 residents each decade.
- From 2000 to 2012 the county population added 72,879 persons or 9.7 percent. Middlesex County's rate of population growth ranked fourth among the state's 21 counties during 2012.
- Middlesex was the state's second most populous county in 2012.



Source: U.S. Bureau of Census and Population Estimates

Population

Middlesex County Racial/Hispanic Origin: 2002 - 2012		
Race	Percent in 2012	Percent in 2002
White	63.6	72.1
Black	10.9	16.3
Asian	22.9	9.9
Multiracial	1.9	1.3
American Indian/Alaska Native	0.6	0.3
Native Hawaiian/Pacific Islander	0.1	0.1
Hispanic Origin (may be of any race)	19.1	14.8

* May not add to 100% due to rounding

Source: U.S. Bureau of Census, Population Estimates

- Edison, Woodbridge, Old Bridge, Piscataway and New Brunswick are the most populous municipalities in Middlesex County. Almost half of Middlesex County residents (46.3%) lived within these five municipalities in 2012. These municipalities benefit from an influx of international immigration, access to Rutgers the State University, major transportation routes, and the warehousing and distribution jobs in the area.

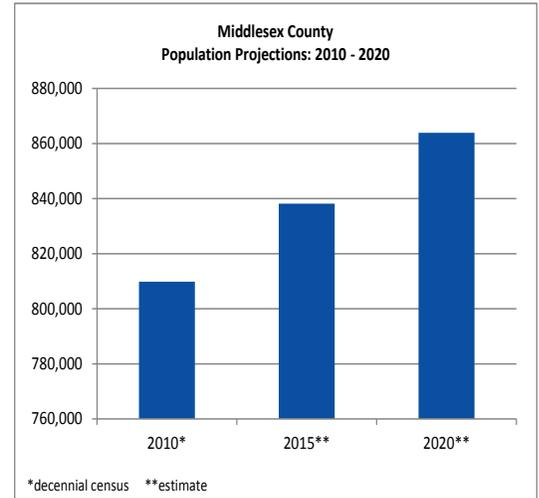
- In 2012, Asians comprised 22.9 percent of Middlesex County's population, an increase from the 9.9 percent held in 2002. Since 2002 the Asian population increased by 148 percent or 112,563 persons and is reflective of natural increment (births minus deaths) and significant international migration into the county. The county's white population declined from 72.1 percent of the total in 2002 to 63.6 percent in 2012.
- The county's Hispanic population increased by 43,645 persons or 38.4 percent from 2002 to account for 19.1 percent of residents in 2012.

Middlesex County Ten Largest Municipalities		
Rank	Municipality	Population
1	Edison township	100,886
2	Woodbridge township	100,228
3	Old Bridge township	66,179
4	Piscataway township	57,650
5	New Brunswick city	56,160
6	Perth Amboy city	51,744
7	East Brunswick township	47,890
8	South Brunswick township	44,259
9	Sayreville borough	43,761
10	North Brunswick township	41,218

Source: U.S. Bureau of Census, Population Estimates

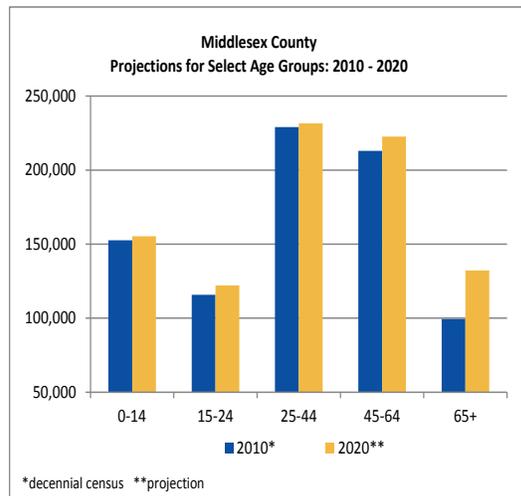
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- Middlesex County's population is expected to increase by 54,040 or 6.7 percent from 2010 to 2020. In comparison, statewide population is anticipated to increase by 5.1 percent during the decade. The county is projected to retain its ranking as the second most populous county in the state in 2020.



Source: NJLWD, Population & Labor Force Projections

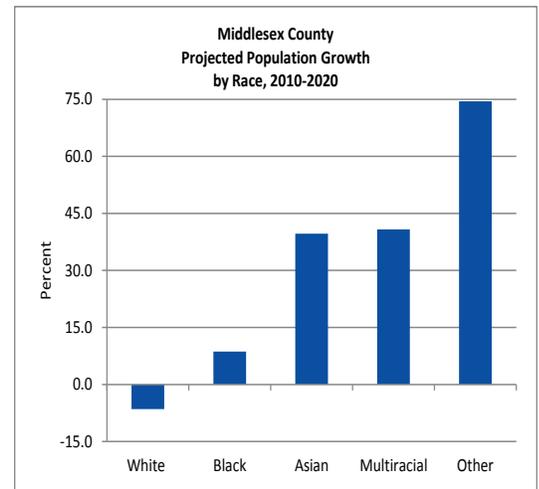
Population Projections



Source: NJLWD, Population & Labor Force Projections

- The county's oldest age group, persons over 65, is expected to grow the fastest (+32.9% or +32,736 persons) through 2020. The 15-24 age group is projected to increase the second fastest at 5.5 percent. The second largest age group, 45-64 year-olds, is projected to increase by 4.5 percent, while the largest age group, 25-44 year-olds, is expected to increase slightly (1.1%) settling at a total of 231,600 persons in 2020.

- From 2010 to 2020, Middlesex County's population is expected to become increasingly diverse as the minority populations increase while the white population declines. The county's Asian population is projected to expand by 70,503 or 39.7 percent and the black population by 7,377 (+8.7%). The population of both other races (+74.5%) and the multi-racial (persons of two or more races; +40.8%) categories are projected to grow most rapidly, albeit from small bases. Other races includes American Indian/Alaska Native and Hawaiian/Pacific Islander.



Source: NJLWD, Population & Labor Force Projections

Middlesex County Community Fact Book

Middlesex County, 2010 - 2020 Projected Employment Change By Industry

Industry Title	2010 Jobs	2020 Jobs	Change: 2010-2020		
			Number	Percent	
				Total	Annual
Total Nonfarm Employment	396,650	431,400	34,750	8.8	0.8
Administrative and Waste Services	37,950	45,700	7,750	20.4	1.9
Professional, Scientific and Technical Services	37,150	44,350	7,200	19.4	1.8
Healthcare and Social Services	40,050	46,800	6,750	17.0	1.6
Wholesale Trade	35,050	39,300	4,250	12.2	1.2
Transportation and Warehousing	22,250	25,700	3,450	15.5	1.5
Retail Trade	39,300	42,000	2,700	6.9	0.7
Construction	11,750	13,800	2,050	17.8	1.6
Other Services	16,300	18,150	1,850	11.3	1.1
Accommodation and Food Services	20,200	21,300	1,100	5.6	0.5
Management of Companies and Enterprises	7,200	8,000	800	11.5	1.1
Real Estate and Rental and Leasing	5,750	6,400	650	11.0	1.1
Educational Services	4,900	5,550	650	12.8	1.2
Finance and Insurance	15,250	15,600	350	2.4	0.2
Utilities	800	850	50	6.1	0.6
Arts, Entertainment and Recreation	2,750	2,800	50	2.7	0.3
Natural Resources and Mining	50	50	0	18.2	1.7
Information	10,150	9,700	-450	-4.2	-0.4
Government	57,000	55,800	-1,200	-2.2	-0.2
Manufacturing	32,900	29,450	-3,450	-10.5	-1.1

Note: Total nonfarm employment excludes self-employed and unpaid family workers

Percent Changes are based on unrounded data

Source: NJLWD, *Industry and Occupational Projections*

Industry Projections

- From 2010 to 2020, Middlesex County is projected to add 34,750 new jobs. Employment is expected to increase by 8.8 percent over the decade, a rate slightly above the state's projected increase of 8.0 percent.
- The administrative and waste services industry in Middlesex County is projected to add the most jobs (7,750) and grow at a rate of 1.9 percent per year. Professional, scientific and technical services is projected to rank second for job growth over the period (+7,200 jobs or +1.8% annually). Combined, these two industries are anticipated to account for 43.0 percent of the county's employment increase.
- With a decline of 3,450 jobs or 1.1 percent per year, the manufacturing sector is projected to experience the largest employment decline in Middlesex County over the 10-year period.

Middlesex County Community Fact Book

Middlesex County Occupations with the Most Projected Job Openings, 2010-2020

Occupation	Annual Average Job Openings			2011	Skill Level ²	Outlook
	Total ¹	Growth	Replacements	Annual Wage		
Retail Salespersons	440	120	320	27,290	Low	Growing
Cashiers	360	20	350	20,970	Low	Stable
Customer Service Representatives	260	70	190	36,340	Low	Growing
Waiters and Waitresses	250	20	230	22,850	Low	Stable
Office Clerks, General	240	90	150	31,600	Low	Growing
Registered Nurses	220	90	120	77,100	High	Growing
Computer Systems Analysts	210	100	110	88,540	High	Growing
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	190	50	140	28,240	Low	Growing
Receptionists and Information Clerks	190	70	120	27,970	Low	Growing
Combined Food Preparation and Serving Workers, Including Fast Food	180	50	130	20,490	Low	Growing
Landscaping and Groundskeeping Workers	160	90	70	25,890	Low	Growing
First-Line Supervisors/Managers of Office and Administrative	150	30	120	55,570	Low	Growing
Stock Clerks and Order Fillers	150	0	150	24,120	Low	Declining
Accountants and Auditors	140	40	100	77,830	High	Growing
Home Health Aides	120	100	30	24,280	Low	Growing
Industrial Truck and Tractor Operators	120	30	90	32,210	Low	Growing
Computer Programmers	110	30	80	85,590	High	Growing
Teacher Assistants	110	20	80	27,040	Low	Growing
Bookkeeping, Accounting, and Auditing Clerks	100	40	60	40,930	Low	Growing
Child Care Workers	100	10	80	22,300	Low	Growing
General and Operations Managers	100	0	90	160,180	High	Stable
Elementary School Teachers, Except Special Education	90	10	80	64,060	High	Stable
Maintenance and Repair Workers, General	90	20	60	41,140	Low	Growing
Secondary School Teachers, Except Special and Vocational Education	90	0	90	67,220	High	Declining
Shipping, Receiving, and Traffic Clerks	90	0	90	32,670	Low	Stable

1. "Growth" and "Replacements" may not add to "Total" due to rounding.

2. High Skills: Associate's degree or higher.

Moderate Skills: Long-term on-the-job training, work experience or post secondary/vocational/technical training.

Low Skills: Short-term or moderate-term on-the-job training, including up to 12 months of on-the-job experience and informal training.

3. INA = Information not available.

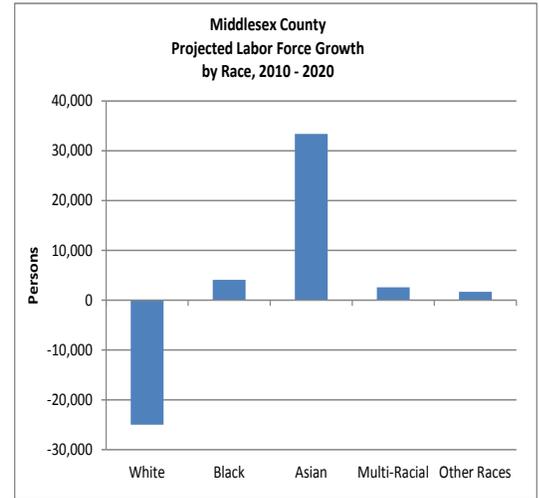
Source: NJLWD, Industry and Occupational Projections and Occupational Employment Statistics (OES) Wage Survey

Projected Occupational Demand

- Middlesex County's top-ranked occupations by annual job openings are expected to be retail salespersons, cashiers, customer service representatives, waiters and waitresses, and office clerks. These occupations have lower skills and educational requirements and are expected to be either stable or growing.
- The table above shows that occupations with higher skills requirements tend to pay higher wages. Occupations with a higher proportion of openings due to replacement demand (openings created as workers leave for other positions, retirements, etc) such as cashiers and retail salespersons tend to have lower skills requirements and pay lower salaries.

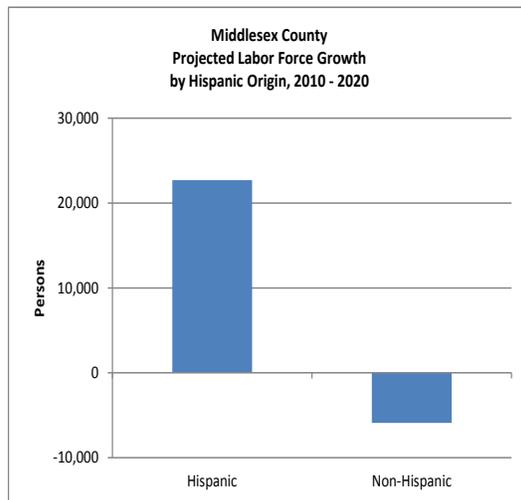
- Middlesex County's labor force is projected to increase by 3.9 percent between 2010 and 2020; less than the statewide growth rate of 4.4 percent over the same period. With a projected increase of 33,400, Asians will make the largest contribution to the labor force due primarily to the rapid growth of the county's Asian population. Despite a decline of 25,000 (-8.8%) whites are still expected to make up the majority of the labor force in 2020 (58.6%).

Note: Multi-racial refers to persons of two or more races. "Other races" includes American Indian/Alaska Native, and Native Hawaiian/Pacific Islander.



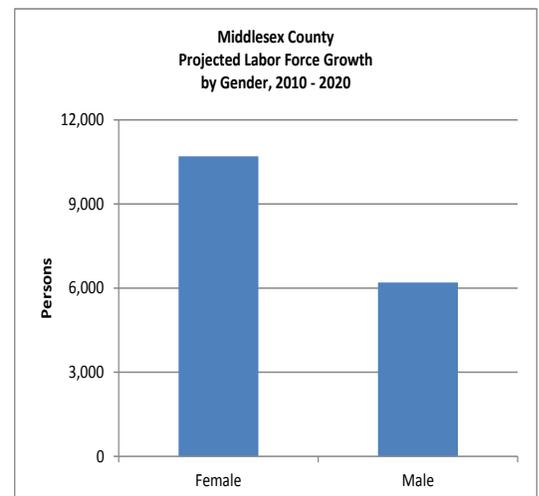
Source: NJLWD, Population & Labor Force Projections

- During the 2010 – 2020 period, Middlesex County's Hispanic labor force is expected to increase by 29.9 percent while the non-Hispanic labor force is expected to decline somewhat (-1.7%). However, non-Hispanics are expected to make up 77.7 percent of Middlesex County's labor force in 2020.



Source: NJLWD, Population & Labor Force Projections

- Over sixty percent (63.7%) of the net addition to Middlesex County's labor force from 2010 to 2020 is projected to be female. The projected growth rate for the county's male labor force is 2.7 percent, a rate less than that of their female counterparts (+5.5%).
- In 2020, 53.6 percent of the county's labor force is expected to be male and 46.4 percent is expected to be female.



Source: NJLWD, Population & Labor Force Projections

Labor Force Projections