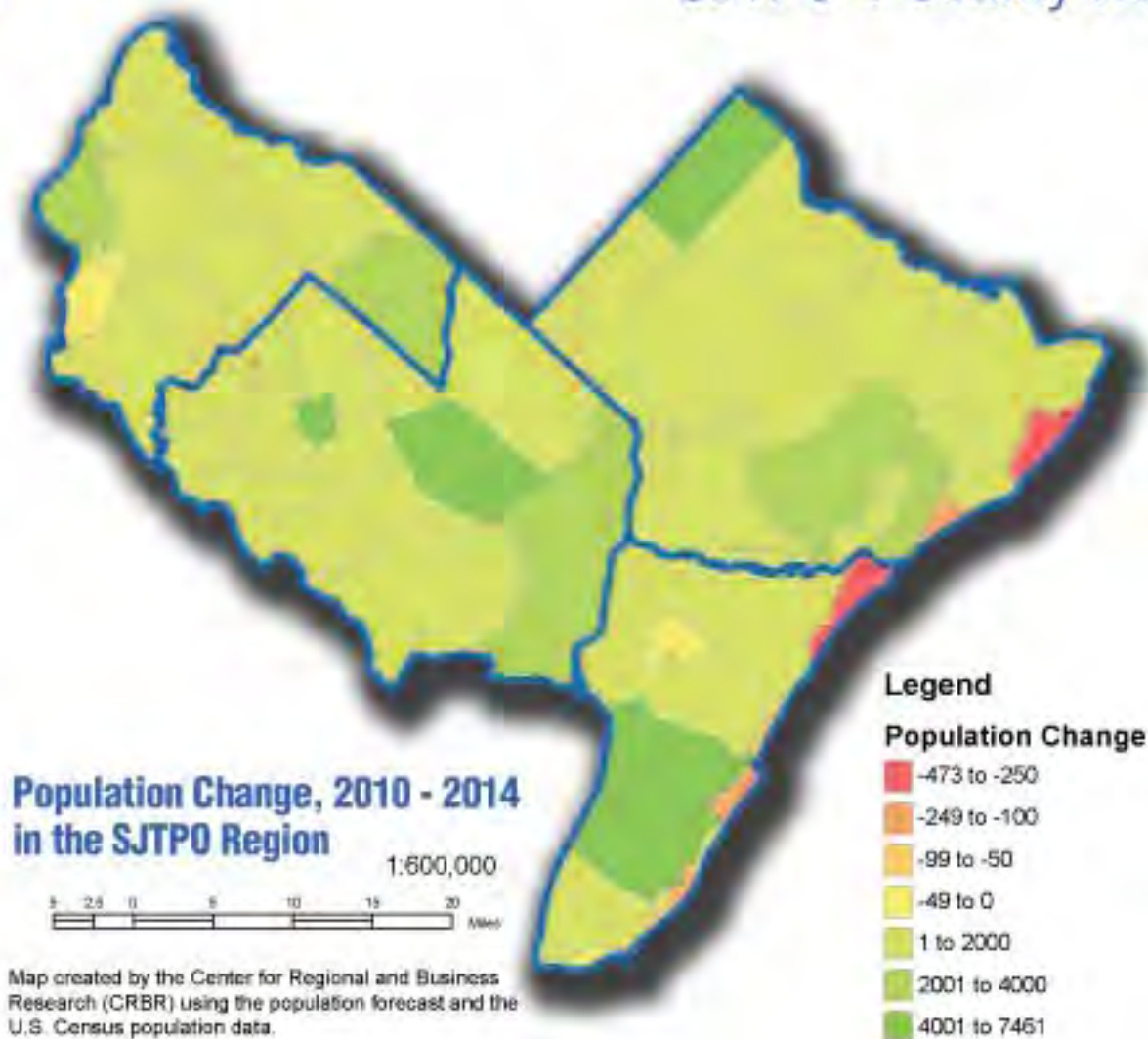




# South Jersey Transportation Planning Organization 2040 Demographic Forecast SJTPO 4-County Region



The 2040 Demographic Forecast represents an update to a forecast performed five years earlier. While the forecast period is long, 30 years, transportation planning requires a long-term view of the growth patterns to occur in the region in order to most efficiently invest public funds. The forecasts provided in this update serve as input to SJTPO Regional Transportation Plan, South Jersey Travel Demand Model, and the Environmental Justice Analysis that are used for regional transportation planning in the four-county region of Atlantic, Cape May, Cumberland and Salem.

Due to the large volume of both historical and forecast data, this report presents only a small fraction of the project's required information. The tables and graphs in this report are intended to provide a broad view of the expected economic and demographic trends in the region. However, the complete project report can be viewed at the SJTPO's website at <http://sjtpo.org/>.





## FOUR COUNTY OVERVIEW

The overall growth of the SJTPO Region is reported in the table below. The regional population growth is projected to be 6.5% per decade for the 2010 – 2040 period. Compared to the 8.2% growth experienced in the 1990 – 2000 decade, this represents a slowing of the most recent historical trend. The 2000 – 2010 decade slowed to 5.2%, influenced heavily by the stagnation of the post-2006 recessionary years.

At the county level, this represents a slower growth trend than the last 20 years for Atlantic County as casino development and retirement homes moderate their growth patterns. Cape May County is expected to reverse its declining population very slowly with a 2.0% 10-year average. Cumberland County continues to grow at the trend of the past 20 years. However, it should be noted that growth in the middle part of the last decade was uncharacteristically high, reinforcing the projection for continued growth. Finally, Salem County is expected to continue to accelerate its growth to 6.6% per decade. The potential for the redevelopment of Pennsville and Salem City, the possibility of expanded employment due to new nuclear power plants, and the access provided by both Rt. 295 and the N.J. Turnpike put the county in the path of development in two or three growth cycles to occur over the forecast period.

The employment projections show an acceleration of trends as the region continues to present inexpensive land and an improving infrastructure to potential employees. With access to major highways, rail and port facilities, the region's employment is expected to grow by 7.1%. While Cape May at 7.4% per decade and Salem at 11.9% have the highest growth rates, they also have fairly small bases to grow from. The majority of jobs are still expected to come from Atlantic and Cumberland counties.

	1990	2000	1990-2000 Growth %	2010	2000-2010 Growth %	2040	2010-2040 Avg. 10-Yr. Growth %
<b>EMPLOYMENT PROJECTIONS</b>							
<b>NON-FARM SJTPO REGION</b>	<b>258,123</b>	<b>270,754</b>	<b>4.8%</b>	<b>259,782</b>	<b>-4.1%</b>	<b>315,141</b>	<b>7.1%</b>
Atlantic County	135,692	144,875	6.8%	135,800	-6.6%	163,285	8.5%
Cape May County	38,833	42,733	10.0%	41,500	-2.9%	50,750	7.4%
Cumberland County	59,600	60,442	1.4%	59,330	-1.8%	71,055	6.6%
Salem County	23,998	22,704	-5.4%	22,152	-2.4%	30,052	11.9%
<b>POPULATION PROJECTIONS</b>							
<b>SJTPO REGION</b>	<b>522,763</b>	<b>565,601</b>	<b>8.2%</b>	<b>594,795</b>	<b>5.2%</b>	<b>710,254</b>	<b>6.5%</b>
Atlantic County	224,327	252,552	12.6%	274,594	8.7%	341,915	8.2%
Cape May County	95,089	102,326	7.6%	97,265	-4.9%	103,083	2.0%
Cumberland County	138,053	145,438	5.1%	156,898	7.1%	186,178	6.2%
Salem County	65,294	64,285	-1.5%	66,083	2.8%	79,078	6.6%

## SJTPO REGIONAL OVERVIEW

The composition of employment is illustrated in the table on the following page. This table shows the growth by North American Industry Classification System (NAICS). The overall 21% growth in jobs from 2010 – 2040 will be accomplished by differential growth rates by sector. The current structure of employment shows dominance by four sectors: retail trade at 15.6% of all employment; healthcare services at 10.4%; accommodations and food services at 18.2%; and, government at all levels at 16.0%. The largest increases in the share of jobs can be seen in real estate and healthcare. However, the fastest growth in employment will be dominated by administrative services (49%), educational services (87%), real state (67%), healthcare (47%) and arts and entertainment (41%).

The stable population growth will cause an expansion in the housing stock as shown on the table on the bottom of the following page. For the entire four-county region, housing units will increase by 20.1%. Vacancy rates will decline slightly from 28.3% to 25.9% as the region's economy becomes a little less seasonal in nature.


**DEMOGRAPHIC FORECAST - NAICS EMPLOYMENT**

Industry	2010	% of Total	2040	% of Total
Ag./Forestry/Fish/Hunt	6,343	2.4%	6,279	2.0%
Mining	731	0.3%	847	0.3%
Utilities	491	0.2%	294	0.1%
Construction	13,337	5.0%	16,386	5.1%
Manufacturing	17,225	6.5%	13,671	4.3%
Wholesale Trade	5,335	2.0%	5,114	1.6%
Retail Trade	41,246	15.6%	50,487	15.7%
Transport./Warehousing	5,944	2.2%	7,381	2.3%
Information	2,177	0.8%	2,277	0.7%
Finance/Insurance	5,992	2.3%	6,804	2.1%
Real Estate/Rental/Leasing	11,363	4.3%	19,003	5.9%
Professional/Tech. Services	8,569	3.2%	9,227	2.9%
Admin./Waste Services	9,603	3.6%	14,357	4.5%
Educational Services	2,765	1.0%	5,163	1.6%
Health Care/Social Assist.	27,460	10.4%	40,415	12.6%
Arts/Entertainment/Rec.	4,736	1.8%	6,682	2.1%
Accommodation/Food Serv.	48,247	18.2%	50,459	15.7%
Other Services	10,845	4.1%	14,173	4.4%
Government	42,514	16.0%	52,420	16.3%
<b>TOTAL</b>	<b>264,922</b>		<b>321,438</b>	

**HOUSING UNITS**

Area	Year	Total Population	Total Housing Units	Total Occupied Housing Units	Total Vacant Housing Units	% Vacant
SJTPO Region	2010	594,795	308,207	220,880	87,327	28.3%
	2040	710,254	370,212	274,322	95,890	25.9%
	% Growth	19.4%	20.1%	24.2	9.8%	-8.6%
Atlantic County	2010	274,549	126,647	102,847	23,800	18.8%
	2040	341,915	160,990	131,015	29,975	18.6%
	% Growth	24.5%	27.1%	27.4%	25.9%	-0.9%
Cape May County	2010	97,265	98,309	40,812	57,497	58.5%
	2040	105,083	104,983	46,215	58,768	56.0%
	% Growth	8.0%	6.8%	13.2%	2.2%	-4.3%
Cumberland County	2010	156,898	55,834	51,931	3,903	7.0%
	2040	186,178	69,381	64,798	4,583	6.6%
	% Growth	18.7%	24.3%	24.6%	20.6%	-4.3%
Salem County	2010	66,083	27,417	25,290	2,127	7.8%
	2040	79,078	34,838	32,385	2,440	7.0%
	% Growth	19.7%	27.1%	28.1%	14.7%	-9.7%

**OTHER COMPONENTS OF THE STUDY**

**GIS-BASED MAPS**

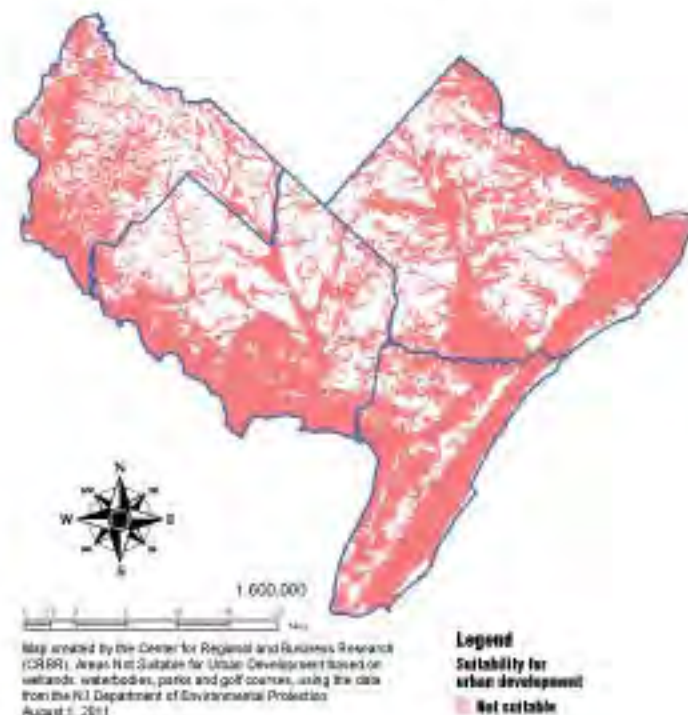
The 2040 Demographic Forecast project included the development of several data elements and maps that will be of interest to particular residents and businesses of the region. This page illustrates some of these products. More information on each can be found in the full report.

Two maps are shown on this page. The first shows the actual planning geography used at the local level by transportation planners. These geographies are each designated a Traffic Analysis Zone (TAZ). In addition, transportation planners need to understand where future development can occur and where it is restricted. The second map illustrates the extent of this undevelopable land, here defined as wetlands, bodies of water, parks and golf courses.

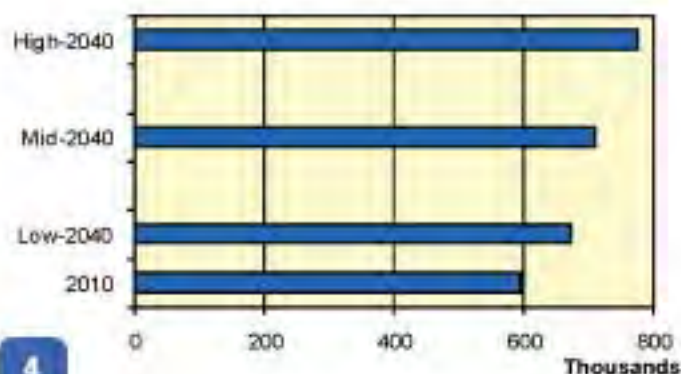
**TRAFFIC ANALYSIS ZONES (TAZ)**



**ENVIRONMENTALLY SENSITIVE LAND**



**ALTERNATIVE GROWTH SCENARIOS**



The project required the development of both low- and high-growth scenarios for population and employment at the county and municipal levels. These scenarios were developed using focus groups composed of both transportation infrastructure users as well as planners. These scenarios are particularly useful in long-term forecasts to provide guidance in cases where events lead the economy down a lower than expected or higher than expected path.

The chart shows the range of possible population projections. The mid-range scenario is the 'most likely' projection based on the assumptions used in this study.