2020

Monmouth County Profile Report








Prepared by
Monmouth County Division of Planning

2020 Monmouth County Profile Report

A Monmouth County Division of Planning Publication

September 2020

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Background Photo: Tatum Park, Middletown | (Source: Monmouth County Open Space Plan 2019, Monmouth County Park System)

Top Row:

Upper Freehold Township | Monmouth County Division of Planning

Sea Girt Beach, Sea Girt | Monmouth County Division of Planning

Holmdel Park, Holmdel | Monmouth County Open Space Plan 2019, Monmouth County Park System)

Bottom Row:

The Link at Aberdeen Station, Aberdeen | 2019 Monmouth County Planning Merit Award Recipient

Pedestrian Safety Demonstration Project, Red Bank | 2019 Monmouth County Planning Merit Award Recipient

CentraState Medical Center's Solar Energy Initiative, Freehold Township | 2019 Monmouth County Planning Merit Award Recipient

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Image 1: Downtown Red Bank (Source: Molly Pitcher Inn)

Introduction

The Monmouth County Division of Planning creates, maintains, and updates a number of annual planning reports for public use. In creating the Monmouth County Profile Report, the Division of Planning provides decision makers and the public with meaningful knowledge and understanding about the complex planning issues facing Monmouth County. This annual profile serves as a comprehensive demographic and economic review of Monmouth County. Preparation of this report involves collection and analysis of data from various sources, including U.S. Census Bureau, U.S. Bureau of Labor Statistics, U.S. Bureau of Economic Analysis, New Jersey Department of Community Affairs, and others. This document seeks to showcase the County's latest demographic trends and economic initiatives involving both the public and private sectors. *The Monmouth County Master Plan* recognizes the *Monmouth County Profile Report* as one of numerous consultative and supportive documents that should be referred to alongside the *Master Plan* during policy formation and program development.

***Disclaimer: Calculations and statistics represented in this report do not reflect the effects of the COVID-19 Pandemic. The majority of the report reflects data collected from 2019 or before unless specified otherwise. Please refer to captions listed below or titles in each figure or table to reference date. Some tables include dates in the datasets. Please see the COVID-19 Pandemic section of the report for more details.**

1. Location

Monmouth County has a total land area of 472 square miles which also includes 27 miles of Atlantic coastline, 26 miles of Raritan Bay coastline. In addition, the County ranks as the sixth largest county in New Jersey. The County is situated along the Atlantic Seaboard between New York City and Philadelphia, centrally located within the Boston to Washington D.C. regional corridor. The County is home to 53 municipalities, ranging in size from 0.1 square miles (Shrewsbury Township) to 62.1 square miles (Howell). Overall population density is approximately 1,321 people per square mile with town populations ranging from 242 residents in the Village of Loch Arbour to 65,475 residents in Middletown Township. Most of the population lives within five miles of either the Raritan Bay shoreline or Atlantic Ocean coastline. The County Seat is Freehold Borough, which is located in central Monmouth County at the convergence of U.S. Highway 9, State Route 33, and County Route 537. Monmouth County's ideal seaside setting, midway between two of the nation's largest metropolitan areas, provides the perfect location for city-bound commuters as well as close getaway destinations for urbanites seeking refuge to the country or the world famous Jersey Shore.

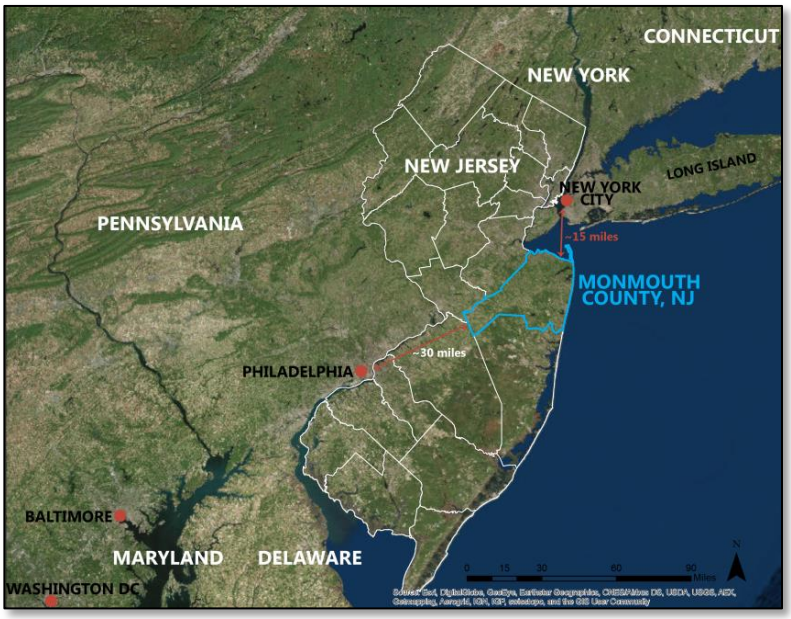


Image 2: Location of Monmouth County (Source: Monmouth County Division of Planning)

According to Stacker.com, along with data collected from U.S. Census American Community Survey, Monmouth County was ranked as the 41st wealthiest county in the United States, with 25.7% of households earning more than $150,000 per year (2018).

2. Population

County Population

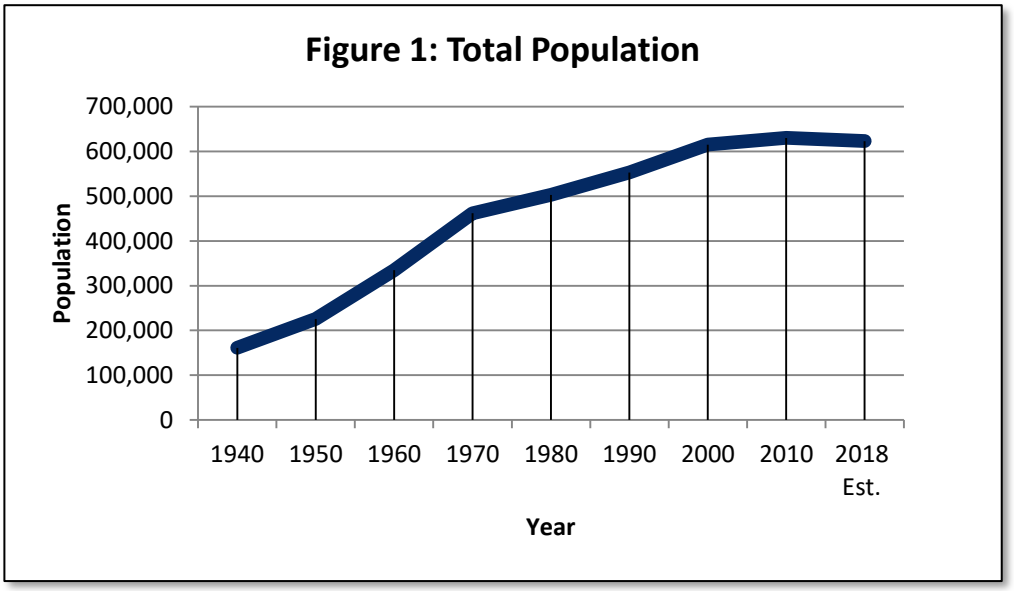
Prior to World War II, Monmouth County was predominately rural with over 50% of its land area devoted to farming. After the war ended, the population surged and by 1950 the County had added over 64,000 residents to the 1940 total of 161,238 people. The 1954 opening of the Garden State Parkway brought expanded residential and economic development opportunities along with improved access to regional employment centers.

The post-war baby boom, suburban migration, and the in-migration of major employers drove population growth for the next two decades, adding over 236,000 residents by 1970; more than doubling the County's population. Almost 50% of Monmouth County's population growth during the post-war suburbanization period (1945-1974) occurred within municipalities adjacent to the Garden State Parkway (Economic Profile of Monmouth County, 1980). In subsequent decades, the County's population growth slowed to a more sustainable rate, averaging 51,000 per decade, reaching 630,380 by the year 2010.



Image 3: Map of Monmouth County Municipalities (Source: Monmouth County Division of Planning)

During the 1980's the widening of Route 9 spurred both residential and economic growth in the western part of the County. Between 1990 and 2000, 51.2% of the County's total population growth occurred within four Western Monmouth municipalities: Howell (16%), Marlboro (14%), Freehold Township (11%) and Manalapan (11%). While capturing a majority of the County's population growth, these four municipalities make up approximately 35% of the total land area within the county. The U.S. Census Bureau estimated that 49% of Monmouth County's population growth between 1990 and 2000 was linked to net natural increase (excess births minus deaths), 34% to in-migration from other parts of the United States, and 19% from international immigration. The 2010 U.S. Census reported Monmouth's population to be 630,380, a 2.45% increase from 2000, the lowest observed population growth increase since The Great Depression. The 2010 Census count ranked Monmouth County as the 5th most populous in New Jersey, encompassing 7.2% of the state's population. The 2018 Census estimates show the first decline in population since 1940 which equated to 1.11%



Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

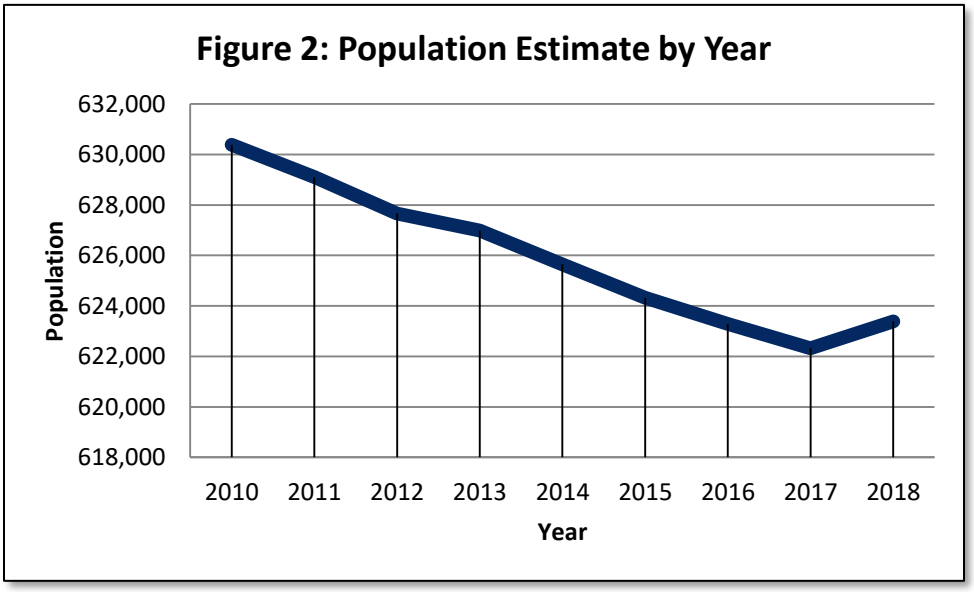
Table 2.1: Total County Population

Year	County	Population Increase	% Increase From Previous Decade
1940	161,238	14,029	9.50%
1950	225,327	64,089	39.75%
1960	334,401	109,074	48.41%
1970	461,849	127,448	38.11%
1980	503,173	41,324	8.95%
1990	553,124	49,951	9.93%
2000	615,301	62,177	11.24%
2010	630,380	15,079	2.45%
2018 (Est.)	623,387	-6,993	-1.11%

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

From 2010 to the current 2018 estimate, Monmouth County has seen a consistent decline in population year over year. In the 8 year span. The population has decreased by 6,993 residents, which equals an average of 874 people per year.

Figure 2 and table 2.2 represents the population estimates of the County by year from 2010-2018.



Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

Between 2000 and 2010, 20 of the County's 53 unique municipalities grew in population, while 33 saw a decline. A significant portion of the County's population growth continued to be concentrated in Western Monmouth. The 2000's marked the first decade in over 50 years in which New Jersey's annual growth rate (0.40%) was faster than Monmouth County's (0.24%).

The recent decline in the County's population growth can be traced to a number of combined factors. Some of the decline is attributable to the displacement of residents in the aftermath of hurricane Sandy. Although the immediate population decline would stabilize and recover during the decade, a number of homeowners sold their damaged homes or abandoned property and decided not to return. A significant number of these sites were either left abandoned or purchased and rebuilt as larger homes to newer flood hazard standards. This conversion from a previous primary residence to a second or "vacation" home has contributed to the decline of the year round populations in shore towns as more and more of the housing stock is placed in this category of home ownership. A third factor is the aging population in Monmouth County. Referring to Figure 3, one can see that the traditional child bearing, family age cohort (25-44) which provides the greatest contribution to natural population increase is declining as the two older cohorts (44-64 and 65+) now comprise almost 50% of the population.

Municipal Populations

According to calculations compiled by Monmouth County Division of Planning staff, the population density of the County is estimated to be 1,321.97 people per square mile. In addition to the historic urban centers, municipalities with the highest population densities can be found along the coast, bayshore, and adjacent to the

Garden State Parkway. With densities ranging from 16,711.11 people per square mile in Shrewsbury Township, to 145.54 people per square mile in Upper Freehold Township.

Table 2.2 illustrates Monmouth County's municipal populations by decade from 1990 to the current estimate for 2018.

Table 2.2: Municipal Populations

Municipality	Square Miles	Population 1990	Population 2000	Population 2010	Population 2018 (Est.)
Aberdeen	5.45	17,038	17,454	18,210	18,317
Allenhurst	0.3	759	718	496	502
Allentown	0.6	1,828	1,882	1,828	1,903
Asbury Park	1.5	16,799	16,930	16,116	15,674
Atlantic Highlands	1.2	4,629	4,705	4,385	4,289
Avon-by-the-Sea	0.4	2,165	2,244	1,901	1,716
Belmar	1	5,877	6,045	5,794	5,647
Bradley Beach	0.7	4,475	4,793	4,298	4,223
Brielle	1.65	4,406	4,893	4,774	4,709
Colts Neck	31.7	8,559	12,331	10,142	9,948
Deal	1.2	1,179	1,070	750	513
Eatontown	5.8	13,800	14,008	12,709	12,237
Englishtown	0.57	1,268	1,764	1,847	2,078
Fair Haven	1.55	5,270	5,937	6,121	5,943
Farmingdale	0.5	1,462	1,587	1,329	1,398
Freehold Borough	1.9	10,742	10,976	12,052	11,855
Freehold Township	37	24,710	31,537	36,184	35,116
Hazlet	5.6	21,976	21,378	20,334	19,908
Highlands	0.64	4,849	5,097	5,005	4,818
Holmdel	17.9	11,532	15,781	16,773	16,582
Howell	62.1	38,978	48,903	51,075	51,958
Interlaken	0.38	910	900	820	758
Keansburg	0.95	11,069	10,732	10,105	9,788
Keyport	1.4	7,586	7,568	7,240	7,265
Lake Como	0.2	1,482	1,806	1,759	1,780
Little Silver	2.8	5,721	6,170	5,950	5,970
Loch Arbour	0.1	380	280	194	242
Long Branch	5.1	28,658	31,340	30,719	30,759
Manalapan	30.85	26,716	33,432	38,872	39,853
Manasquan	1.4	5,369	6,310	5,897	5,800
Marlboro	30.35	27,974	36,398	40,191	40,133

Municipality	Square Miles	Population 1990	Population 2000	Population 2010	Population 2018 (Est.)
Matawan	2.26	9,270	8,910	8,810	8,826
Middletown	41.08	68,183	66,327	66,522	65,475
Millstone	37.37	5,069	8,970	10,566	10,460
Monmouth Beach	1.1	3,303	3,595	3,279	3,221
Neptune City	0.9	4,997	5,218	4,869	4,702
Neptune Township	8	28,148	27,690	27,935	27,591
Ocean	11.2	25,058	26,959	27,291	26,821
Oceanport	3.1	6,146	5,807	5,832	5,848
Red Bank	1.75	10,636	11,844	12,206	12,194
Roosevelt	1.93	884	933	882	833
Rumson	5.2	6,701	7,137	7,122	6,805
Sea Bright	0.6	1,693	1,818	1,412	1,348
Sea Girt	1.05	2,099	2,148	1,828	1,870
Shrewsbury Borough	2.3	3,096	3,590	3,809	4,088
Shrewsbury Township	0.09	1,098	1,098	1,141	1,504
Spring Lake	1.3	3,499	3,567	2,993	2,945
Spring Lake Heights	1.3	5,341	5,227	4,713	4,595
Tinton Falls	15.15	12,361	15,053	17,892	17,131
Union Beach	1.8	6,156	6,649	6,245	5,549
Upper Freehold	47.45	3,277	4,282	6,902	6,906
Wall	31.01	20,244	25,261	26,164	25,836
West Long Branch	2.83	7,690	8,258	8,097	7,917
Monmouth County	**471.56**	**533,124**	**615,301**	**630,380**	**623,387**

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

Table 2.3 illustrates Monmouth County's municipal population densities and rankings for 2018. They are in order alphabetically and ranked from highest to lowest density (people per square mile).

Table 2.3: Municipal Population Densities (2018 Est.)					
Municipality	**Population Density (People per sq. mile)**	**Ranking**		**Ranking By Numerical Order**	
Aberdeen	3,360.92	22		1	Shrewsbury Township
Allenhurst	1,673.33	39		2	Asbury Park
Allentown	3,171.67	23		3	Keansburg
Asbury Park	10,449.33	2		4	Lake Como
Atlantic Highlands	3,574.17	18		5	Highlands
Avon-by-the-Sea	4,290.00	13		6	Red Bank
Belmar	5,647.00	10		7	Freehold Borough
Bradley Beach	6,032.86	8		8	Bradley Beach
Brielle	2,853.94	26		9	Long Branch
Colts Neck	313.82	51		10	Belmar
Deal	427.50	50		11	Neptune City
Eatontown	2,109.83	34		12	Keyport
Englishtown	3,645.61	17		13	Avon-by-the-Sea
Fair Haven	3,834.19	16		14	Manasquan
Farmingdale	2,796.00	28		15	Matawan
Freehold Borough	6,239.47	7		16	Fair Haven
Freehold Township	949.08	45		17	Englishtown
Hazlet	3,555.00	19		18	Atlantic Highlands
Highlands	7,528.13	5		19	Hazlet
Holmdel	926.37	46		20	Spring Lake Heights
Howell	836.68	47		21	Neptune Township
Interlaken	1,994.74	35		22	Aberdeen
Keansburg	10,303.16	3		23	Allentown
Keyport	5,189.29	12		24	Union Beach
Lake Como	8,900.00	4		25	Monmouth Beach
Little Silver	2,132.14	33		26	Brielle
Loch Arbour	2,420.00	29		27	West Long Branch
Long Branch	6,031.18	9		28	Farmingdale
Manalapan	1,291.83	43		29	Loch Arbour
Manasquan	4,142.86	14		30	Ocean
Marlboro	1,322.34	41		31	Spring Lake
Matawan	3,905.31	15		32	Sea Bright
Middletown	1,593.84	40		33	Little Silver

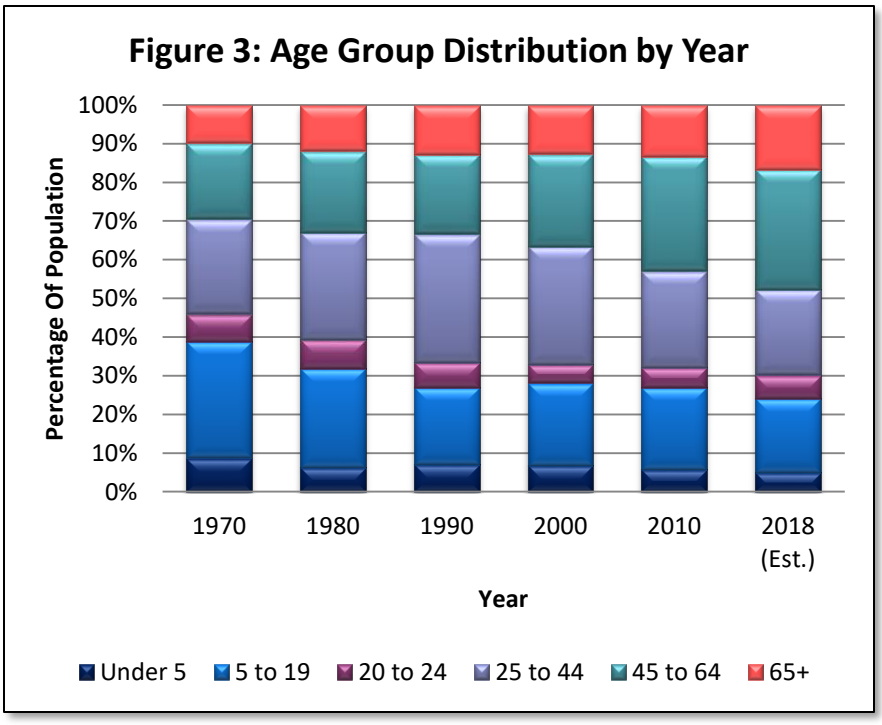
Municipality	Population Density (People per sq. mile)	Ranking		Ranking By Numerical Order	
Millstone	279.90	52		34	Eatontown
Monmouth Beach	2,928.18	25		35	Interlaken
Neptune City	5,224.44	11		36	Oceanport
Neptune Township	3,448.88	21		37	Sea Girt
Ocean	2,394.73	30		38	Shrewsbury Borough
Oceanport	1,886.45	36		39	Allenhurst
Red Bank	6,968.00	6		40	Middletown
Roosevelt	431.61	49		41	Marlboro
Rumson	1,308.65	42		42	Rumson
Sea Bright	2,246.67	32		43	Manalapan
Sea Girt	1,780.95	37		44	Tinton Falls
Shrewsbury Borough	1,777.39	38		45	Freehold Township
Shrewsbury Township	16,711.11	1		46	Holmdel
Spring Lake	2,265.38	31		47	Howell
Spring Lake Heights	3,534.62	20		48	Wall
Tinton Falls	1,130.76	44		49	Roosevelt
Union Beach	3,082.78	24		50	Deal
Upper Freehold	145.54	53		51	Colts Neck
Wall	833.15	48		52	Millstone
West Long Branch	2,797.53	27		53	Upper Freehold
Monmouth County	**1,321.97**				

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

Age Group Distribution

Between 1990 and 2010, the 45–64 year age cohort experienced the largest absolute growth in population increasing from 113,846 in 1990 to 147,371 in 2000. Growth continues within the 65+ age cohort, with the 2010 Census reporting that 13.3% of the County's population is comprised within this category. Since 1990, the 65+ cohort has increased by 33,292 residents or 47.2%.

Figure 3 and table 2.4 depict trends within Monmouth County's age cohorts between 1970 and 2018. Census data indicates a gradual aging of the Monmouth County population. Between 2000 and 2010, the median age in Monmouth County increased 3.6 years from 37.7 to 41.3. Presently the 2018 median age estimate is 43.2 years old. To compare to New Jersey's reported median age of 39.8 years old and the United States' median age of 37.9 years old.

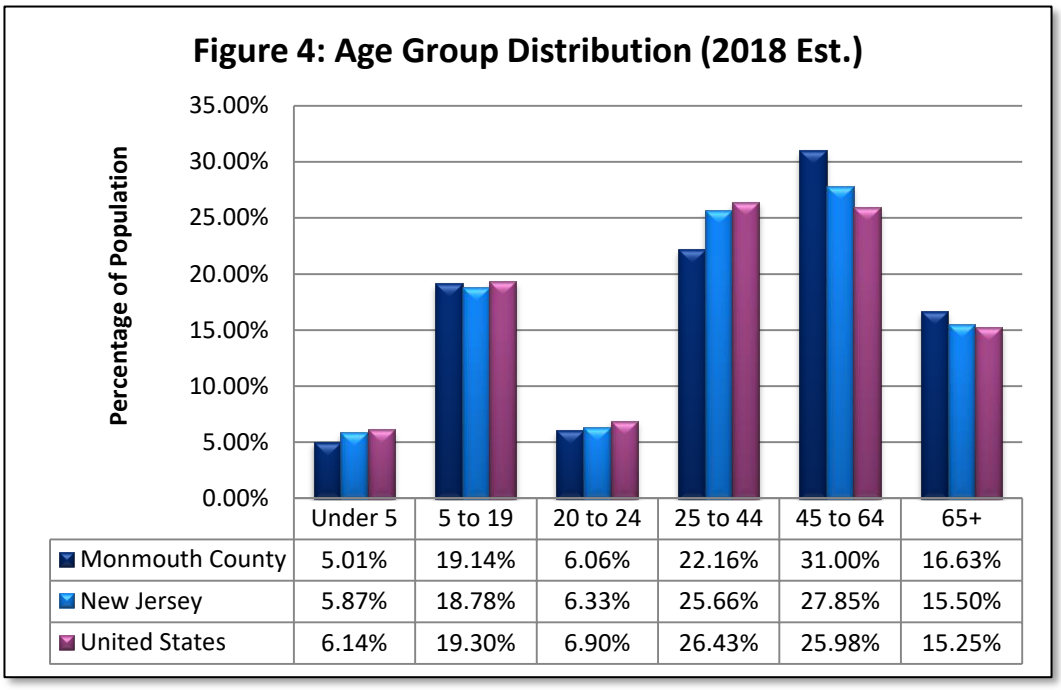


Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

Table 2.4: Age Group Distribution by Year						
Age Cohort	**1970**	**1980**	**1990**	**2000**	**2010**	**2018 (Est.)**
Under 5	40,440	31,423	38,969	41,998	36,105	31,241
5 to 19	138,462	129,114	110,024	131,209	133,310	119,296
20 to 24	32,422	37,489	36,053	29,000	33,055	37,802
25 to 44	112,727	139,563	183,845	188,393	156,566	138,133
45 to 64	90,409	106,048	113,846	147,371	185,504	193,236
65+	44,919	59,536	70,387	77,249	83,572	103,679
Total	459,379	503,173	553,124	615,220	628,112	623,387

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

While some age cohorts increased in population others experienced noteworthy declines. Between 2000 and 2018, the most significant age cohort decline occurred within the 25-44 year cohort, with the population decreasing from 188,393 in 2000 to 138,133 in 2018, which equates to a decrease of 50,260. The Under 5 population of Monmouth County peaked in 2000 with 42,231, then declined by 10,757 (34.4%). Figure 4 contains a snapshot of the 2018 estimated age cohorts that makeup Monmouth County, compared to New Jersey, and the United States.



Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

Cumulative Birth and Death Estimate

Table 2.5 depicts the cumulative births and deaths within the County from 2010 to 2019. Net increases peaked in 2012 with 1,101 more births within the County than deaths. 2018 began the downward trend in net total.

Table 2.5: Cumulative Births and Deaths

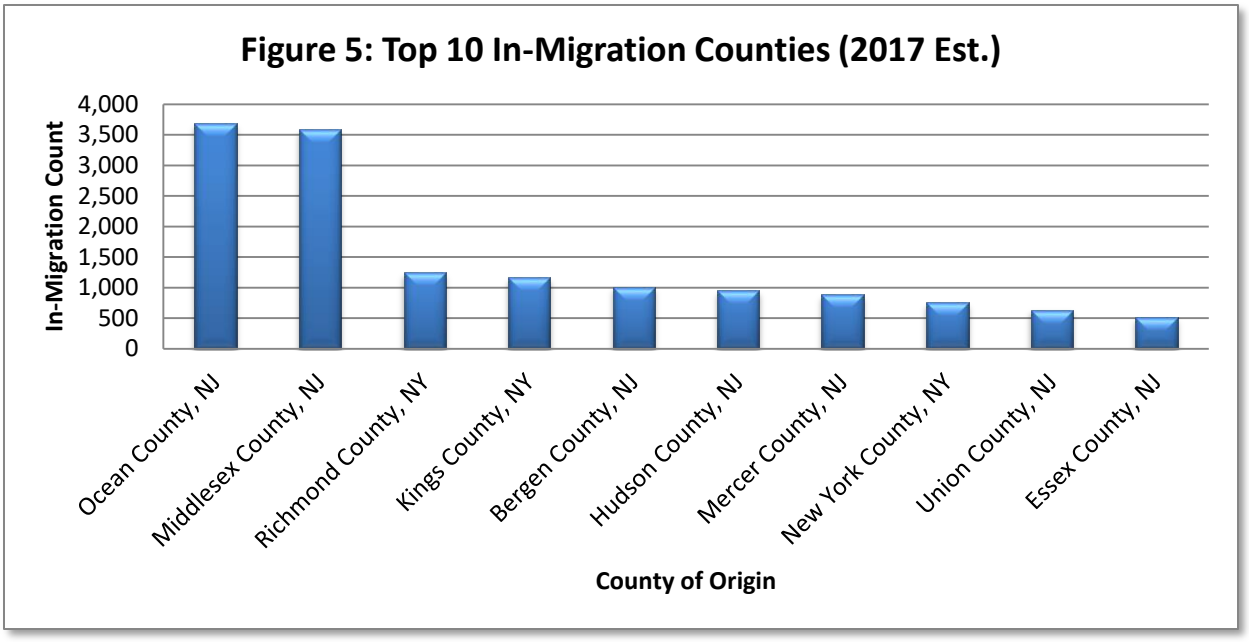
	Vital Events			Net Migration
Year	**Births**	**Deaths**	**Net Total**	**Net %**
2010	1,609	1,347	262	19.5%
2011	6,236	5,388	848	15.7%
2012	6,224	5,123	1,101	21.5%
2013	6,001	5,479	522	9.5%
2014	5,993	5,174	819	15.8%
2015	5,778	5,493	285	5.2%
2016	5,893	5,249	644	12.3%
2017	5,753	5,485	268	4.9%
2018	5,700	5,775	-75	-1.3%
2019	5,644	5,867	-223	-3.8%
		Total	4,451	9.9%

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

3. Migration

In-Migration

The data used in the following calculations is derived from the U.S. Census County to County Migration Flows: 2013-2017 ACS. This used to calculate migration within counties both inside the U.S. and outside the U.S. The highest migration totals in 2017 are those moving in from neighboring Ocean and Middlesex Counties. 3,960 (15.3%) residents moved from Ocean County to Monmouth County and 3,580 (14.8%) residents moved from Middlesex County into Monmouth County. A total of 24,180 residents moved into the County in 2017.



Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

Table 3.1 shows the top 10 counties where new residents migrated from.

Table 3.1: Top 10 In-Migration Counties (2017)		
Rank	**County of Residence**	**Number of Residents**
1	Ocean County, NJ	3,690
2	Middlesex County, NJ	3,580
3	Richmond County, NY	1,243
4	Kings County, NY	1,169
5	Bergen County, NJ	1,012
6	Hudson County, NJ	945
7	Mercer County, NJ	885
8	New York County, NY	751
9	Union County, NJ	633
10	Essex County, NJ	518
	Total in-Migration	**24,180**

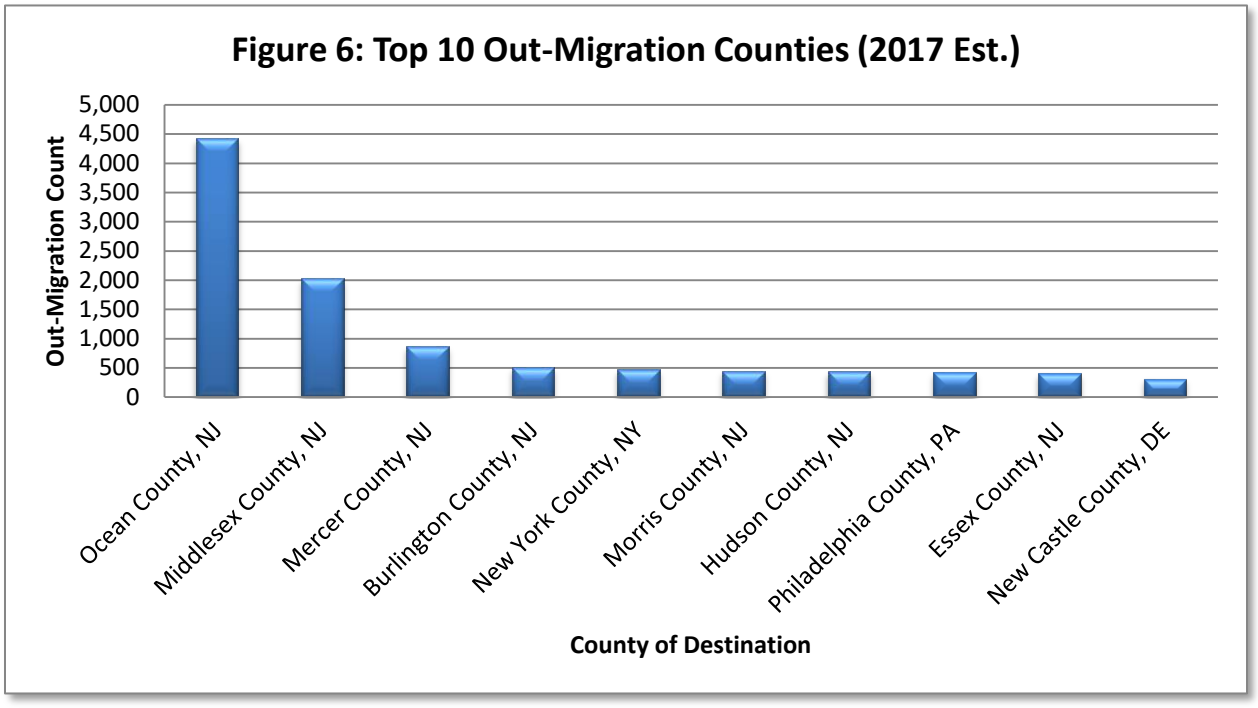
Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning



Image 4: Pier Village, Long Branch (Source: Realtor.com)

Out-Migration

Figure 6 and table 3.2 lists the top counties that serve as destinations for households migrating out of Monmouth County. A total of 23,950 residents moved out of Monmouth County in 2017 of which 4,420 (18.5%) residents relocated to Ocean County, and 2,030 (8.5%) relocated to Middlesex County.



Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

Table 3.2: Top 10 Out-Migration Counties (2017)		
Rank	**County of Residence**	**Number of Residents**
1	Ocean County, NJ	4,420
2	Middlesex County, NJ	2,030
3	Mercer County, NJ	864
4	Burlington County, NJ	497
5	New York County, NY	473
6	Morris County, NJ	444
7	Hudson County, NJ	436
8	Philadelphia County, PA	422
9	Essex County, NJ	405
10	New Castle County, DE	306
	Total Out-Migration	**23,950**

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

Of the 24,950 County in-migrations, 2,590 (10.7%) were immigrants from outside the United States. The County saw a net increase of 230 new residents equaling about a 1% net gain.

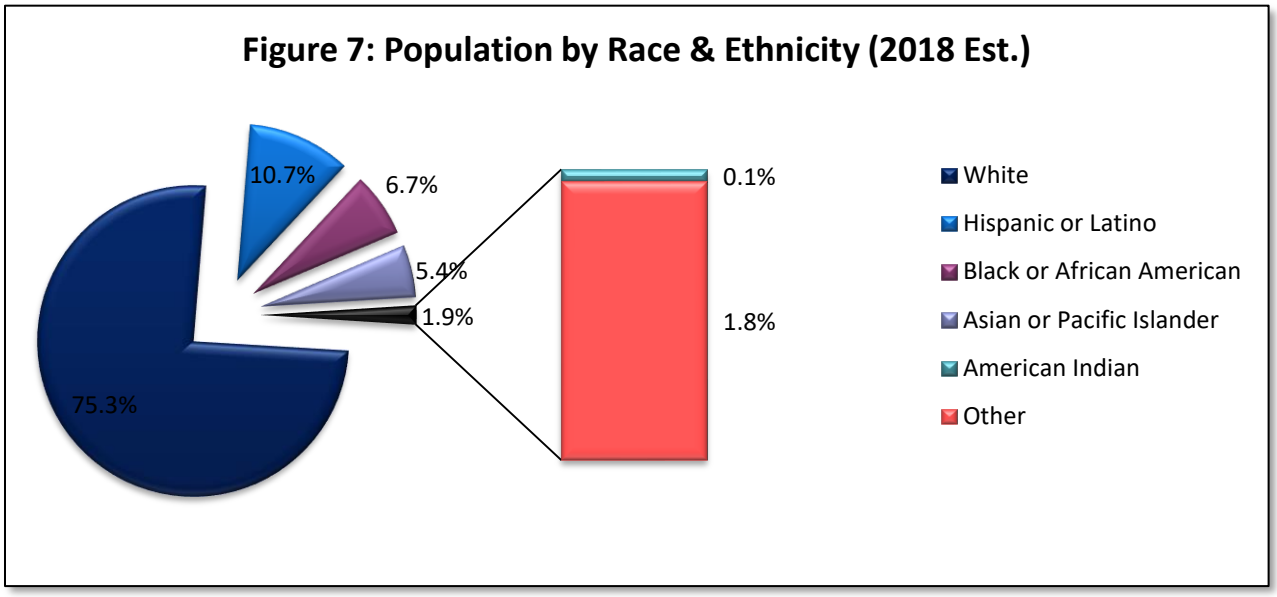
Table 3.3: Net Migration				
Inter-County Total	21,590		Total In	24,180
Inter-County %	89.3%		Total Out	23,950
Immigrant Total	2,590		Net Migration	230
Immigrant %	10.7%		**Net Migration %**	**1%**

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

4. Race & Ethnicity

According to the U.S. Census, race and ethnicity are considered separate and distinct identities. These self-identification data items ask residents to choose the race or races with which they most closely identify, and to indicate whether or not they are of Hispanic or Latino origin. Recent numbers show Monmouth County as a whole is becoming more diverse. Since 1980 the White population has decreased percentage wise by 12.3% while all other races and ethnicities have increased in percentages at some rate. The only exception is the Black or African American population saw a slight decrease amounting to 0.5% from 2010 compared to the 2018 estimate. The Hispanic or Latino population has seen the largest increase in the county since 1980, totaling a growth of 8.1%.

Figure 7: Population by Race & Ethnicity (2018 Est.)



Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning
*Black shaded section in figure represents American Indian and Other combined

Table 4.1 further breaks down the County's total population by race & ethnicity.

Table 4.1: Population by Race & Ethnicity							
Total Population							
	White	**Hispanic or Latino**	**Black or African American**	**Asian or Pacific Islander**	**American Indian**	**Other**	**Total Population**
1980*	440,765	12,915	42,258	1,653	506	5,076	503,173
1990	469,109	22,407	45,683	14,864	649	412	553,124
2000	519,261	38,175	49,609	24,556	879	10,685	615,301
2010	487,545	56,476	45,411	31,194	553	6,933	628,112
2018 (Est.)	469,708	66,528	41,485	33,821	507	11,338	623,387
Percentage of Population							
	White	**Hispanic or Latino**	**Black or African American**	**Asian or Pacific Islander**	**American Indian**	**Other**	**Total Population**
1980*	87.6%	2.6%	8.4%	0.3%	0.1%	1.0%	503,173
1990	84.8%	4.1%	8.3%	2.7%	0.1%	0.1%	553,124
2000	84.4%	6.2%	8.1%	4.0%	0.1%	1.7%	615,301
2010	77.6%	9.0%	7.2%	5.0%	0.1%	1.1%	628,112
2018 (Est.)	75.3%	10.7%	6.7%	5.4%	0.1%	1.8%	623,387

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning
*Race & Ethnicity Pre- 1990 are categorized differently. Data was categorized as close to original as possible while remaining consistent.

5. Households

Household Demographics

During the period of accelerated population growth (between 1950 and 1970), the County's household size averaged 3.40 individuals. After reaching an all-time low in 1980 at 2.52 individuals, average household size in Monmouth County has remained relatively stable since 1980 at 2.70 people. Presently the average household size within the county is 2.64 people per household. 1-Person and 2-Person households have a combined market share of 58.2%. This means any household with 3-Person and 4 or More Person, amounts to a combined 41.8% of the population. This can potentially be linked to the lack of children being born within the County population and the influx of 55+ Communities being developed. Fair Haven has the largest average household size of 3.19 people per household, while Highlands has the lowest with 1.73 people per household as represented in table 5.1

Table 5.1: Household Demographics (2018 Est.)		
	Total Number	**% of Total**
Number of Households	235,727	100.0%
Family Household*	162,377	68.9%
Nonfamily Households**	73,350	31.1%
Household Size		
1-Person	60,601	25.7%
2-Person	76,720	32.5%
3-Person	35,810	15.2%
4-or More Person	62,596	26.6%
Average Household Size	**2.64**	

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning
*Family household: a household comprised of two or more people related by birth, marriage, or adoption and residing together
** Nonfamily households: consists of a householder living alone or where the householder shares the home exclusively with people to whom they is not related.



Image 5: Atlantic Highlands Municipal Harbor (Source: Diane Turton Realtors)

Table 5.2 represents a calculated breakdown of the average household size by municipality and their ranking from largest average household size, to smallest average household size.

Average Household Size by Municipality

Table 5.2: Average Household Size by Municipality (2018 Est.)							
Municipality	1990	2000	2010	2018 (Est.)	Ranking 2018 (Est.)	Ranking By Numerical Order	
Aberdeen	2.86	2.70	2.64	2.57	25	1	Fair Haven
Allenhurst	2.55	2.52	2.29	2.45	32	2	Millstone
Allentown	2.79	2.66	2.60	2.66	21	3	Marlboro
Asbury Park	2.37	2.46	2.35	2.29	40	4	Rumson
Atlantic Highlands	2.61	2.39	2.34	2.49	28	5	Colts Neck
Avon-by-the-Sea	2.16	2.15	2.11	1.96	51	6	Roosevelt
Belmar	2.15	2.05	2.14	2.20	46	7	Union Beach
Bradley Beach	2.22	2.09	2.05	2.79	14	8	Howell
Brielle	2.54	2.52	2.64	2.65	22	9	Freehold Borough
Colts Neck	3.16	3.17	3.08	3.03	5	10	Manalapan
Deal	5.27	2.46	2.25	2.15	49	11	Holmdel
Eatontown	2.39	2.35	2.32	2.23	43	12	Hazlet
Englishtown	2.73	2.74	2.84	2.65	23	13	Upper Freehold
Fair Haven	2.79	2.95	3.11	3.19	1	14	Bradley Beach
Farmingdale	2.61	2.54	2.43	2.47	31	15	Little Silver
Freehold Borough	2.78	2.96	2.98	2.87	9	16	Middletown
Freehold Township	2.86	2.76	2.75	2.72	18	17	West Long Branch
Hazlet	3.05	2.92	2.82	2.80	12	18	Freehold Township
Highlands	2.13	2.08	1.91	1.73	53	19	Shrewsbury Borough
Holmdel	3.30	3.09	2.92	2.84	11	20	Oceanport
Howell	3.04	3.04	2.95	2.92	8	21	Allentown
Interlaken	2.41	2.33	2.27	2.21	45	22	Brielle
Keansburg	2.85	2.71	2.58	2.39	36	23	Englishtown
Keyport	2.38	2.31	2.35	2.32	38	24	Wall
Lake Como	2.24	2.19	2.24	2.32	39	25	Aberdeen
Little Silver	2.83	2.76	2.77	2.79	15	26	Long Branch
Loch Arbour	2.77	2.33	2.37	2.44	34	27	Matawan
Long Branch	2.44	2.47	2.60	2.56	26	28	Atlantic Highlands
Manalapan	3.13	3.09	2.92	2.86	10	29	Manasquan
Manasquan	2.41	2.43	2.48	2.49	29	30	Ocean
Marlboro	3.27	3.15	3.09	3.15	3	31	Farmingdale

Municipality	1990	2000	2010	2018 (Est.)	Ranking 2018 (Est.)		Ranking By Numerical Order	
Matawan	2.62	2.52	2.59	2.55	27		32	Allenhurst
Middletown	2.95	2.84	2.77	2.76	16		33	Neptune Township
Millstone	3.14	3.28	3.20	3.19	2		34	Loch Arbour
Monmouth Beach	2.22	2.20	2.19	2.27	41		35	Spring Lake
Neptune City	2.30	2.29	2.24	2.19	47		36	Keansburg
Neptune Township	2.61	2.46	2.45	2.45	33		37	Red Bank
Ocean	2.70	2.63	2.57	2.49	30		38	Keyport
Oceanport	2.80	2.71	2.59	2.69	20		39	Lake Como
Red Bank	2.19	2.20	2.43	2.33	37		40	Asbury Park
Roosevelt	2.74	2.77	2.81	2.96	6		41	Monmouth Beach
Rumson	2.80	2.91	3.03	3.11	4		42	Sea Girt
Sea Bright	1.88	1.81	1.78	1.83	52		43	Eatontown
Sea Girt	2.41	2.28	2.22	2.24	42		44	Shrewsbury Township
Shrewsbury Borough	2.81	2.96	2.87	2.71	19		45	Interlaken
Shrewsbury Township	2.20	2.10	1.96	2.22	44		46	Belmar
Spring Lake	2.53	2.43	2.38	2.43	35		47	Neptune City
Spring Lake Heights	2.09	2.04	2.03	2.00	50		48	Tinton Falls
Tinton Falls	2.76	2.51	2.11	2.16	48		49	Deal
Union Beach	3.11	3.09	2.91	2.93	7		50	Spring Lake Heights
Upper Freehold	2.97	2.96	2.92	2.80	13		51	Avon-by-the-Sea
Wall	2.71	2.64	2.57	2.64	24		52	Sea Bright
West Long Branch	2.77	2.77	2.77	2.73	17		53	Highlands
Monmouth County	**2.74**	**2.70**	**2.70**	**2.64**				

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

Occupation Location of Monmouth County Residents

Monmouth County's higher household earnings are in some measure linked to the number of residents working outside of the County—particularly in New York City and northern New Jersey employment centers. Data gathered from the American Community Survey 2011-2015 Commuting Flows data shows that approximately 116,000 Monmouth County residents commute out of the County for work. This also includes those working from home for industries in other states. Of those, the top three commuting destinations are Middlesex County, NJ (23.2%), New York County, NY (18.3%) and Ocean County, NJ (11.6%). These three counties account for 53.2% of Monmouth County residents that commute outside the County for employment

Analysis of resident workplace locations demonstrates how transportation infrastructure improvements, allowing for efficient access to other regions, have eased commutes for residents employed outside of the County. Direct bus service transports residents to urban employment centers such as Jersey City, Newark, and Manhattan. Ferry service shuttles passengers from Middletown, Highlands, and Atlantic Highlands to terminals in lower Manhattan. The North Jersey Coast Line provides Monmouth County workers with rail connections to Hoboken,

Newark, and New York City. For driving commuters, Route 18 connects Monmouth County residents to major Middlesex County employment centers such as New Brunswick and Piscataway. The Garden State Parkway and Route 287 enable commuters to reach employment and technology centers in Morris and Essex Counties. Interstate 195 and 295 provide connections to jobs in Trenton and the Princeton/Route 1 Corridor—extending residents' job market reach from Philadelphia to New York.

Table 5.3 summarizes the top 10 Counties of employment of Monmouth County residents. Percentages are calculated based off of the number of total residents commuting out of the County.

Table 5.3: Top 10 Outside Counties of Employment of Monmouth County Residents (2015 Est.)

		2011-2015	
	County of Work	**Total**	**% of Total**
	Monmouth, NJ (Work within County)	**184,920**	
Rank			
1	Middlesex County, NJ	26,869	23.2%
2	New York County, NY	21,249	18.3%
3	Ocean County, NJ	13,437	11.6%
4	Mercer County, NJ	7,954	6.9%
5	Union County, NJ	7,080	6.1%
6	Essex County, NJ	6,924	6.0%
7	Hudson County, NJ	5,867	5.1%
8	Kings County, NY	4,195	3.6%
9	Somerset County, NJ	4,025	3.5%
10	Richmond County, NY	2,908	2.5%
	Other Counties	15,539	13.4%
	Total Workers Commuting Out	**116,047**	

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning
Based off of American Community Survey (ACS) 2011-2015 Commuting Flows

Residential Locations of Monmouth County Workers

Information about the places of residence for employees working within Monmouth County reflects a different commuting pattern. According to data from OnTheMap, an interactive data resource provided by the U.S. Census Bureau, Center for Economic Studies, the top Monmouth County work locations are Freehold Township, Holmdel, Red Bank, and Neptune Township. The Route 35 and Route 9 corridors are both hotspots of employment within the County. A total of 80,820 workers commute into Monmouth County for work. Of those, the majority come from Ocean County (52.9%) and Middlesex County (23.7%).

Table 5.4 represents the top locations of those who work in Monmouth County commute from.
(Note: Percentages are based off number of total workers commuting into Monmouth County)

Table 5.4: Top 10 Counties of Residence of Monmouth County Workers (2015 Est.)			
		2011-2015	
	County of Work	Total	% of Total
	Monmouth County	184,920	
Rank			
1	Ocean County, NJ	42,367	52.9%
2	Middlesex County, NJ	18,941	23.7%
3	Mercer County, NJ	2,852	3.6%
4	Union County, NJ	2,560	3.2%
5	Somerset County, NJ	1,461	1.8%
6	Burlington County, NJ	1,378	1.7%
7	Essex County, NJ	1,306	1.6%
8	Bergen County, NJ	1,015	1.3%
9	Hudson County, NJ	860	1.1%
10	Kings County, NY	749	0.9%
	Other Counties	6,531	8.2%
	Total Workers Commuting In	**80,020**	

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning
Based off of American Community Survey (ACS) 2011-2015 Commuting Flows

Based on the total number of commuters entering and exiting, nearly half (48.5%) of Monmouth County workers commute within the boundaries of the County for work. While 30.5% commute out of the County, and 21.0% commute in from locations outside the County

Table 5.5: Commuter Totals		
	2011-2015	
Commuting Out	116,047	30.5%
Commuting In	80,020	21.0%
Inner-County Commuting	184,920	48.5%
Total Monmouth County Commuters	264,940	
Total Commuters	**380,987**	

Source: U.S. Census Bureau ACS 2011-2015 Commuting Flows: Compiled by the Monmouth County Division of Planning
Total Monmouth County Commuters = Commuting Out + Inner-County Commuters
Total Commuters = Commuting Out + Commuting In + Inner-County Commuting

6. Education

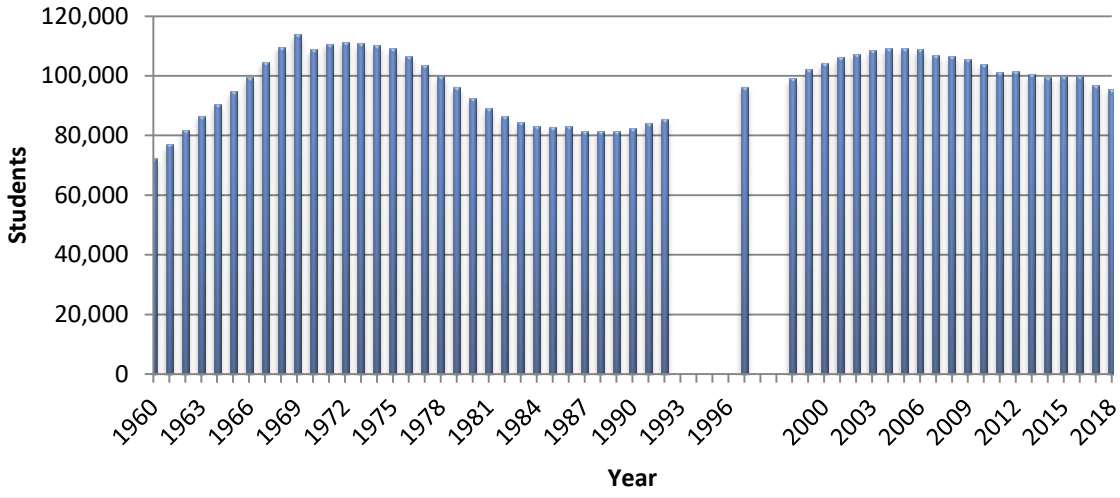
Monmouth County School Enrollment

A data source for identifying potential spikes in population totals is public school enrollment data. Annually, school boards file enrollment reports with the New Jersey Department of Education. Enrollment counts are broken down by grade, gender, race and ethnicity. Although public school enrollment numbers are only a subset of the school age population (data excludes private, parochial, and home-schooled students), analysis of the data when matched with corresponding Census data can serve as a potential tracking tool for this age cohort and the overall population.

Over the past 50 years, Monmouth County public school enrollment has reached two separate peaks: the 1972-73 and 2005-06 school years. Both peaks are concurrent with the population dynamics of the post-war baby-boom population, expanded residential development and transportation infrastructure improvements. Additionally, the State of New Jersey also reported peak enrollment numbers during the same years.

Since the last peak of 2005-06, school enrollment has seen a gradual decline. Between 2005-06 and 2017-18, school enrollment has dropped by 11%. Recent slowdowns in residential development, the County's median age trending higher, and declining numbers of 20–34 year olds (prime child-bearing years) are all potential contributors to this decline in school enrollment.

Figure 8: Monmouth County School Enrollment



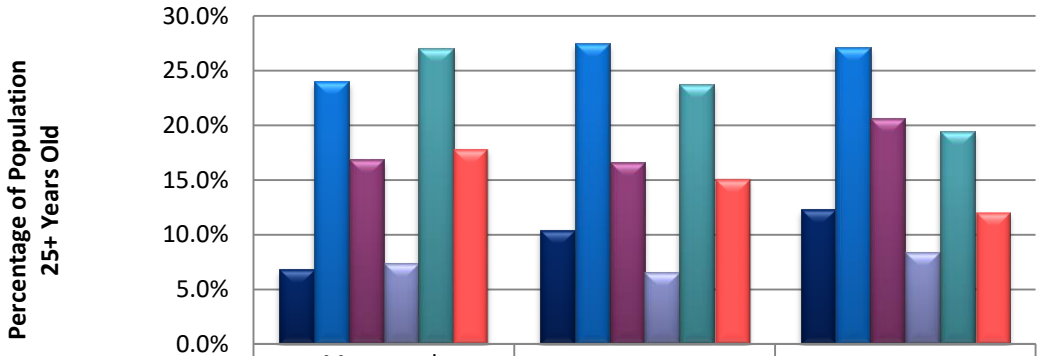
Source: New Jersey Department of Education

Educational Attainment

Monmouth County's residents have achieved a high level of educational attainment, making for a highly skilled localized labor force. The 2018 ACS 5-Year Estimates reported that approximately 93.1% of adult residents over the age of 25 have earned a high school diploma or higher, as compared to the New Jersey figure of 89.5%, and the national figure of 87.9%.

About 52.2% of Monmouth County's over-25 population has earned a higher education degree: 7.3% have earned an associate degree, 27.1% have earned a bachelor's degree, and 17.8% have earned a graduate or professional degree. Compared to New Jersey where 45.4% have achieved a degree in higher education compared to the United State with 39.9% of the population.

Figure 9: Educational Attainment (Est. 2018)



	Monmouth County	New Jersey	United States
No High School Degree	6.8%	10.5%	12.3%
High School Degree Only	24.0%	27.5%	27.1%
Some College	16.9%	16.6%	20.6%
Associate's Degree	7.3%	6.5%	8.4%
Bachelor's Degree	27.1%	23.8%	19.4%
Graduate or Professional Degree	17.8%	15.1%	12.1%

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

7. Income

Household Income Distribution

The 2018 ACS 5-Year estimates reported the median household income in Monmouth County was $95,699, which is 20.5% above New Jersey's median income of $79,363, and 58.8% above the United States' median income of $60,239. Approximately 29.3% of Monmouth County households had total combined income of $150,000+, as compared to 22.7% of New Jersey households, and 13.3% of the United States households.

Table 7.1: Household Income Distribution (2018 Est.)

Income Bracket	Monmouth County	% of Total	New Jersey	% of Total	United States	% of Total
Total households	233,874		3,213,362		119,730,128	
Less than $10,000	9,200	3.9%	165,332	5.1%	7,584,305	6.3%
$10,000 to $14,999	6,489	2.8%	106,777	3.3%	5,507,051	4.6%
$15,000 to $24,999	14,796	6.3%	239,248	7.4%	11,146,961	9.3%
$25,000 to $34,999	14,648	6.3%	228,906	7.1%	11,117,434	9.3%
$35,000 to $49,999	18,503	7.9%	313,308	9.8%	15,124,821	12.6%

Income Bracket	Monmouth County	% of Total	New Jersey	% of Total	United States	% of Total
$50,000 to $74,999	31,453	13.4%	479,792	14.9%	20,910,222	17.5%
$75,000 to $99,999	26,869	11.5%	389,646	12.1%	14,937,330	12.5%
$100,000 to $149,999	43,374	18.5%	563,372	17.5%	17,533,125	14.6%
$150,000 to $199,999	27,234	11.6%	310,244	9.7%	7,513,313	6.3%
$200,000 or more	41,308	17.7%	416,737	13.0%	8,355,566	7.0%
Median Income	**$95,699**		**$79,363**		**$60,239**	

Source: U.S. Census Bureau

Personal Income Distribution

The U.S. Census suggests that Monmouth County residents earn a higher percentage of personal income than both New Jersey and the United States within the following industries:

- Construction
- Information
- Finance and insurance, and real estate and rental and leasing
- Professional, scientific, and management, and administrative and waste management services
- Educational services, and health care and social assistance

Accommodation and Food Services; and Retail Trade industrial sectors also play a prominent role in Monmouth County's employment structure due to how extensively they contribute to the County's tourism industry.

Table 7.2: Personal Income Distribution (2018 Est.)

Industry of Occupation	Monmouth County	New Jersey	United States
Civilian employed population 16 years and over	**315,831**	**4,390,602**	**152,739,884**
Agriculture, forestry, fishing and hunting, and mining	0.2%	0.3%	1.8%
Construction	7.2%	5.8%	6.5%
Manufacturing	5.9%	8.2%	10.2%
Wholesale trade	2.9%	3.4%	2.6%
Retail trade	11.1%	11.0%	11.3%
Transportation and warehousing, and utilities	4.8%	6.0%	5.2%
Information	3.5%	2.8%	2.1%
Finance and insurance, and real estate and rental and leasing	10.2%	8.5%	6.6%
Professional, scientific, and management, and administrative and waste management services	13.4%	13.3%	11.4%
Educational services, and health care and social assistance	24.0%	23.8%	23.1%
Arts, entertainment, and recreation, and accommodation and food services	8.7%	8.2%	9.7%
Other services, except public administration	4.0%	4.4%	4.9%
Public administration	4.2%	4.2%	4.6%

Source: U.S. Bureau of Labor Statistics

Per Capita Income

When evaluating per capita income in 2018 inflation-adjusted dollars, Monmouth County hovered at an average of $51,716, which was 26.4% higher than the state's per capita income of $40,895, and 58.5% above the national per capita income of $32,621. Monmouth County residents have the fifth highest per capita income in New Jersey, while Hunterdon County is the highest per capita income county, with $54,984.

Table 7.3: Per Capita Income (2018 Est.)

Municipality	Income	Municipality Ranking	
Aberdeen	$40,652	1	Sea Girt
Allenhurst	$84,773	2	Rumson
Allentown	$46,054	3	Allenhurst
Asbury Park	$27,070	4	Little Silver
Atlantic Highlands	$49,178	5	Sea Bright
Avon-by-the-Sea	$69,976	6	Colts Neck
Belmar	$47,217	7	Interlaken
Bradley Beach	$51,586	8	Holmdel
Brielle	$62,022	9	Avon-by-the-Sea
Colts Neck	$71,809	10	Loch Arbour
Deal	$67,416	11	Deal
Eatontown	$41,041	12	Fair Haven
Englishtown	$31,579	13	Monmouth Beach
Fair Haven	$64,598	14	Brielle
Farmingdale	$28,100	15	Millstone
Freehold Borough	$25,386	16	Marlboro
Freehold Township	$46,291	17	Spring Lake
Hazlet	$38,040	18	Shrewsbury Borough
Highlands	$50,288	19	Upper Freehold
Holmdel	$70,556	20	Middletown
Howell	$41,107	21	Manasquan
Interlaken	$71,229	22	Bradley Beach
Keansburg	$29,640	23	Highlands
Keyport	$31,754	24	Manalapan
Lake Como	$43,894	25	Spring Lake Heights
Little Silver	$75,491	26	Wall
Loch Arbour	$68,899	27	Atlantic Highlands
Long Branch	$32,420	28	Tinton Falls
Manalapan	$50,108	29	Belmar
Manasquan	$51,961	30	Freehold Township
Marlboro	$58,136	31	Allentown

Municipality	Income		Municipality Ranking	
Matawan	$41,510		32	Oceanport
Middletown	$54,053		33	Lake Como
Millstone	$59,564		34	Ocean
Monmouth Beach	$64,168		35	Red Bank
Neptune City	$34,612		36	Matawan
Neptune Township	$35,884		37	Howell
Ocean	$42,602		38	Eatontown
Oceanport	$44,557		39	Aberdeen
Red Bank	$42,105		40	West Long Branch
Roosevelt	$39,278		41	Roosevelt
Rumson	$99,083		42	Hazlet
Sea Bright	$72,165		43	Neptune Township
Sea Girt	$99,847		44	Neptune City
Shrewsbury Borough	$55,346		45	Long Branch
Shrewsbury Township	$28,565		46	Keyport
Spring Lake	$57,116		47	Englishtown
Spring Lake Heights	$49,690		48	Union Beach
Tinton Falls	$48,932		49	Keansburg
Union Beach	$31,025		50	Shrewsbury Township
Upper Freehold	$54,727		51	Farmingdale
Wall	$49,250		52	Asbury Park
West Long Branch	$39,709		53	Freehold Borough
Monmouth County	$51,716			

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

Unemployment

The U.S. Bureau of Labor Statistics reported Monmouth County's 2019 average unemployment rate was 3.2% with 10,428 residents reporting unemployment out of a labor force of 328,661. This number is down since 2012 when Monmouth County experienced a peak unemployment rate of 8.7%, when 28,902 residents reported unemployment out of a labor force of 331,636. Table 7.4 provides a comparison among the average reported unemployment rates for Monmouth County from 2014 to 2019, in addition to a total change in the labor force.

Table 7.4: Monmouth County Labor Force

	2014	2015	2016	2017	2018	2019
Labor Force Total	325,525	326,153	326,476	324,530	323,106	328,661
Employment	305,755	309,267	311,922	311,151	311,236	318,233
Unemployment	19,770	16,886	14,554	13,379	11,870	10,428
Unemployment Rate	6.10%	5.20%	4.50%	4.10%	3.70%	3.20%
New Jersey Unemployment Rate	6.80%	5.80%	5.00%	4.60%	4.10%	3.60%
United States Unemployment Rate	6.20%	5.30%	4.90%	4.40%	3.90%	3.50%
Total Change	**5,555**					
Percent Change (Labor Force)	**1.7%**					

Source: U.S. Bureau of Labor Statistics: Compiled by the Monmouth County Division of Planning

Top 10 County Employers

Table 7.5 represents the top 10 employers in Monmouth County. These employers account for 25,552 employees, nearly 8% of the civilian employed population 16 years and older. The top employers are mainly centered on the healthcare and grocery retail industries.

Table 7.5: Top 10 County Employers (2018)

Employer	Employees
Hackensack Meridian Health	11,560
Saker Shoprite Inc.	3,327
CentraState Healthcare Inc.	2,681
RWJ Barnabas - Monmouth Medical Center	1,932
Monmouth University	1,525
Visiting Nurses Association of New Jersey	1,099
Commvault	944
Renaissance Gardens - Seabrook Village	850
NJ Resource	834
Food Circus Supermarkets Inc.	800

Source: Monmouth County Division of Economic Development

Means of Transportation to Work

Table 7.6 represents how Monmouth County residents get to and from work. There is an increase in trips from 1990 to the current 2018 estimates, in addition to the number of those employed within the County. When comparing the total number of workers, counts show a relatively stable increase year over year with no significant jump except from 1990 to 2000. The majority of trips are single occupancy vehicle trips. Included in these increases are those employees who work from home. We can assume there is an increase in the number of employees converting to working from home due to the increased efficiency and declining costs of telecommunication technology and mobile meeting rooms.

Table 7.6: Means of Transportation to Work

	1990		2000		2010		2018 (Est.)	
Transportation Type	**Total**	**% of Total**	**Total**	**% of Total**	**Total**	**% of Total**	**Total**	**% of Total**
Car, Truck, or Van	236,116	86.0%	248,029	85.0%	252,495	83.3%	255,338	82.5%
Drove Alone*	204,969	86.8%	221,097	89.1%	224,805	89.0%	233,771	91.6%
Carpooled*	31,147	13.2%	26,932	10.9%	27,690	11.0%	21,567	8.4%
Public Transportation	29,704	10.8%	N/A	N/A	25,563	8.4%	25,362	8.2%
Other	8,691	3.2%	43,909	15.0%	24,902	8.2%	28,870	9.3%
Total Workers	**274,511**		**291,938**		**302,960**		**309,570**	

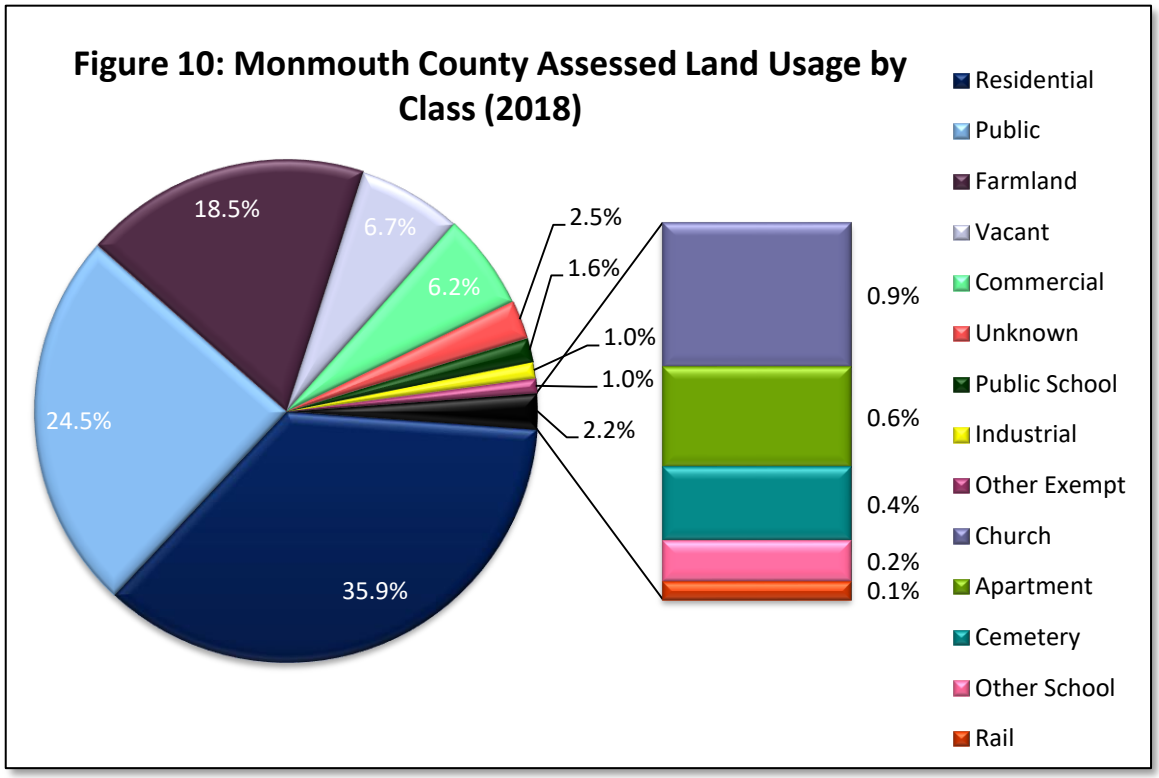
Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning
Shaded yellow section is not calculated into "Total Workers
"Total Workers" are civilian employed residents 16 years or older
Other includes Working from Home
*Drove Alone and Carpooled percentages are calculated from "Car, Truck, Van" Total

8. Ratable Distribution

Monmouth County Assessed Land Usage by Class

Monmouth County's 2018 Net Taxable Valuation was $119,785,889,692. Figure 10 illustrates the County's breakdown of assessed land usage by property class, with categories outlined by the Monmouth County Board of Taxation. This data set was compiled by Division of Planning Staff using the new *Monmouth County GeoHub* Parcel Data, of which is a public facing user interface where users can view and research geographically related County data using Geographic Information System (GIS). This program is housed at the Division of Planning website and is updated regularly.

The percentage of how the County classifies its land usage does not change drastically year over year. The only notable change seen between 2017 and 2018 was the 1.5% decrease in residential usage, which is the County's largest classified usage. This significant difference can be attributed to the removal of water area from land use calculations in all property classes. This was done in order to give a more accurate calculation to the actual amount of land and how it is being utilized.



Source: Monmouth County Board of Taxation, Monmouth County GeoHub: Compiled by the Monmouth County Division of Planning
Data was collected from the Monmouth County GeoHub Parcel Layer; Property Class categories are obtained from the Monmouth County Tax Board
Calculations are compiled and categorized by their respective names unless otherwise listed below:

- Farmland includes Farmland and Farmland Residential
- Railroad Class includes Railroad Class I and Railroad Class II

*The legend to the right of the figure is in order by percentage from highest to lowest
*Black Shaded area in figure represents Church, Apartment, Cemetery, Other School, and Rail Assessed land usages combined
*Areas that were categorized as water or waterbodies on GIS Mapping Software have been clipped from the total taxable acreage 2018 calculations only

Table 8.1: Monmouth County Assessed Land Usage By Class (2018 Est.)

	2017		2018		2017-2018
Property Class	**Total Acreage**	**% of Total**	**Total Acreage**	**% of Total**	**% Change**
Residential	96,482.6	37.4%	96,859.5	35.9%	-1.5%
Apartment	1,616.1	0.6%	1,606.2	0.6%	0.0%
Commercial	1,705.8	6.1%	16,740.3	6.2%	0.1%
Industrial	2,843.6	1.0%	2,826.9	1.0%	0.0%
Farmland	51,128.7	18.4%	49,862.9	18.5%	0.1%
Vacant	19,033.8	6.8%	18,044.6	6.7%	-0.1%
Public	69,108.9	24.8%	66,204.5	24.5%	-0.3%
Public School	4,274.3	1.5%	4,242.5	1.6%	0.1%
Other School	650.6	0.2%	649.1	0.2%	0.0%

	2017		2018		2017-2018
Property Class	**Total Acreage**	**% of Total**	**Total Acreage**	**% of Total**	**% Change**
Church	2,315.1	0.8%	2,303.6	0.9%	0.1%
Cemetery	1,184.6	0.4%	1,181.2	0.4%	0.0%
Rail	296.3	0.1%	295.3	0.1%	0.0%
Other Exempt	2,632.5	0.9%	2,584.2	1.0%	0.1%
Unknown	9,572.9	3.4%	6,753.7	2.5%	-0.9%
Total	**262,845.8**		**270,154.6**		

*Refer to caption under Figure 10 for calculation and source details

Largest Taxpayers in Monmouth County

Table 8.2 represents the largest taxpayer within Monmouth County. Many of the large contributors' primary usage of the property are centered on retail, of which are The Freehold Raceway Mall, The Monmouth Mall, and Pier Village.

Table 8.2: Largest Tax Payers in Monmouth County (2018)

Rank	Property	Location	Assessed Value	Taxes
1	Freehold Raceway Mall	Freehold Township	$500,608,000	$11,228,637
2	Monmouth Mall	Eatontown	$234,104,600	$5,227,556
3	Pier Village	Long Branch	$178,254,600	$3,673,827
4	Jersey Shore Premium Outlets	Tinton Falls	$175,000,000	$3,477,250
5	AT&T Corporate Park	Middletown	$160,000,000	$3,398,400
6	Seabrook	Tinton Falls	$135,000,000	$2,682,450
7	Monmouth Park	Oceanport	$87,869,400	$1,895,343
8	Avalon Bay Apartments	Freehold Township	$66,726,700	$1,496,680
9	Seaview Square Mall	Ocean Township	$69,197,700	$1,419,245
10	Woodshire Apartments	Ocean Township	$67,693,700	$1,338,398
11	Holmdel Towne Center	Holmdel	$63,700,700	$1,292,487
12	The Grove	Shrewsbury	$58,997,600	$1,260,189
		Total	**$1,797,153,000**	**$38,390,462**

Source: Asbury Park Press: Compiled by the Monmouth County Division of Planning

9. Housing

Housing Demographics

The following tables (9.1, 9.2, and 9.3) were created in order to define what housing stock at the municipal level consists of, in addition to determining what percentage of that housing stock is left vacant. By doing so, this can help determine if there is a lack of services, employment, or access to public transportation in specific locations. (Note: Vacant is defined as a unit not being used as a primary residence. This includes seasonal/ vacation homes, and unoccupied or unpurchased units)

Table 9.1: Municipal Housing Occupancy (2018 Est.)

Municipality	Total Units	Owner-Occupied	Renter-Occupied	Vacant	Owner %	Renter %	Vacant %
Aberdeen	7,500	5,376	1,730	394	71.7%	23.1%	5.3%
Allenhurst	352	139	66	147	39.5%	18.8%	41.8%
Allentown	725	555	160	10	76.6%	22.1%	1.4%
Asbury Park	8,231	1,413	5,308	1,510	17.2%	64.5%	18.3%
Atlantic Highlands	1,942	1,328	391	223	68.4%	20.1%	11.5%
Avon-by-the-Sea	1,322	592	303	427	44.8%	22.9%	32.3%
Belmar	3,722	1,252	1,308	1,162	33.6%	35.1%	31.2%
Bradley Beach	3,049	962	1,158	929	31.6%	38.0%	30.5%
Brielle	2,142	1,617	163	362	75.5%	7.6%	16.9%
Colts Neck	3,449	2,969	293	187	86.1%	8.5%	5.4%
Deal	886	134	102	650	15.1%	11.5%	73.4%
Eatontown	5,859	2,849	2,557	453	48.6%	43.6%	7.7%
Englishtown	807	480	259	68	59.5%	32.1%	8.4%
Fair Haven	1,928	1,682	182	64	87.2%	9.4%	3.3%
Farmingdale	590	285	281	24	48.3%	47.6%	4.1%
Freehold Borough	4,469	1,954	2,154	361	43.7%	48.2%	8.1%
Freehold Township	13,287	9,864	2,674	749	74.2%	20.1%	5.6%
Hazlet	7,415	6,152	888	375	83.0%	12.0%	5.1%
Highlands	3,597	1,715	1,072	810	47.7%	29.8%	22.5%
Holmdel	5,985	4,883	804	298	81.6%	13.4%	5.0%
Howell	18,681	15,711	2,052	918	84.1%	11.0%	4.9%
Interlaken	395	330	13	52	83.5%	3.3%	13.2%
Keansburg	5,023	2,127	1,902	994	42.3%	37.9%	19.8%
Keyport	3,402	1,655	1,593	154	48.6%	46.8%	4.5%
Lake Como	1,059	490	320	249	46.3%	30.2%	23.5%
Little Silver	2,207	2,078	64	65	94.2%	2.9%	2.9%
Loch Arbour	159	62	11	86	54.4%	6.9%	54.1%
Long Branch	14,383	4,746	4,230	5,407	33.0%	50.3%	37.6%

Municipality	Total Units	Owner-Occupied	Renter-Occupied	Vacant	Owner %	Renter %	Vacant %
Manalapan	14,524	11,969	1,882	673	82.4%	13.0%	4.6%
Manasquan	3,471	1,965	365	1,141	56.6%	10.5%	32.9%
Marlboro	13,299	11,824	877	598	88.9%	6.6%	4.5%
Matawan	3,535	2,233	1,192	110	63.2%	33.7%	3.1%
Middletown	24,841	19,765	3,926	1,150	79.6%	15.8%	4.6%
Millstone	3,537	3,108	162	267	87.9%	4.6%	7.5%
Monmouth Beach	1,957	1,212	207	538	61.9%	10.6%	27.5%
Neptune City	2,266	1,280	837	149	56.5%	36.9%	6.6%
Neptune Township	12,935	7,146	3,944	1,845	55.2%	30.5%	14.3%
Ocean	11,779	7,254	3,506	1,019	61.6%	29.8%	8.7%
Oceanport	2,365	1,867	272	226	78.9%	11.5%	9.6%
Red Bank	5,954	2,521	2,793	640	42.3%	46.9%	10.7%
Roosevelt	288	227	48	13	78.8%	16.7%	4.5%
Rumson	2,431	2,006	176	249	82.5%	7.2%	10.2%
Sea Bright	1,163	410	331	422	35.3%	28.5%	36.3%
Sea Girt	1,278	702	65	511	54.9%	5.1%	40.0%
Shrewsbury Borough	1,488	1,338	116	34	89.9%	7.8%	2.3%
Shrewsbury Township	513	295	180	38	57.5%	35.1%	7.4%
Spring Lake	2,091	956	255	880	45.7%	12.2%	42.1%
Spring Lake Heights	2,595	1,389	907	299	53.5%	35.0%	11.5%
Tinton Falls	8,659	5,403	2,689	567	62.4%	31.1%	6.5%
Union Beach	2,208	1,757	136	315	79.6%	6.2%	14.3%
Upper Freehold	2,652	2,363	105	184	89.1%	4.0%	6.9%
Wall	10,381	7,897	1,738	746	76.1%	16.7%	7.2%
West Long Branch	2,689	1,885	574	230	70.1%	21.3%	8.6%
Monmouth County	**261,139**	**172,322**	**61,552**	**27,265**	**66.0%**	**23.6%**	**10.4%**

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

For more information on housing occupancy for different points in time, see table 9.3: Countywide Housing Occupancy by Year

Table 9.2 represents the ranking of municipalities based on the following criteria: highest percentage of owner-occupied housing, highest percentage of renter-occupied housing and the highest percentage of vacant units overall. This can help determine if there is a lack of a specific housing type in each municipality.

Table 9.2: Housing Occupancy Ranking (2018 Est.)

Rank	Owner Rank (Owner %)	Renter Rank (Renter %)	Vacant Ranking (% Vacant)
1	Little Silver	Asbury Park	Deal
2	Shrewsbury Borough	Long Branch	Loch Arbour
3	Upper Freehold	Freehold Borough	Spring Lake
4	Marlboro	Farmingdale	Allenhurst
5	Millstone	Red Bank	Sea Girt
6	Fair Haven	Keyport	Long Branch
7	Colts Neck	Eatontown	Sea Bright
8	Howell	Bradley Beach	Manasquan
9	Interlaken	Keansburg	Avon-by-the-Sea
10	Hazlet	Neptune City	Belmar
11	Rumson	Belmar	Bradley Beach
12	Manalapan	Shrewsbury Township	Monmouth Beach
13	Holmdel	Spring Lake Heights	Lake Como
14	Middletown	Matawan	Highlands
15	Union Beach	Englishtown	Keansburg
16	Oceanport	Tinton Falls	Asbury Park
17	Roosevelt	Neptune Township	Brielle
18	Allentown	Lake Como	Union Beach
19	Wall	Highlands	Neptune Township
20	Brielle	Ocean	Interlaken
21	Freehold Township	Sea Bright	Spring Lake Heights
22	Aberdeen	Aberdeen	Atlantic Highlands
23	West Long Branch	Avon-by-the-Sea	Red Bank
24	Atlantic Highlands	Allentown	Rumson
25	Matawan	West Long Branch	Oceanport
26	Tinton Falls	Atlantic Highlands	Ocean
27	Monmouth Beach	Freehold Township	West Long Branch
28	Ocean	Allenhurst	Englishtown
29	Englishtown	Roosevelt	Freehold Borough
30	Shrewsbury Township	Wall	Eatontown
31	Manasquan	Middletown	Millstone
32	Neptune City	Holmdel	Shrewsbury Township
33	Neptune Township	Manalapan	Wall

Rank	Owner Rank (Owner %)	Renter Rank (Renter %)	Vacant Ranking (% Vacant)
34	Sea Girt	Spring Lake	Upper Freehold
35	Loch Arbour	Hazlet	Neptune City
36	Spring Lake Heights	Deal	Tinton Falls
37	Eatontown	Oceanport	Freehold Township
38	Keyport	Howell	Colts Neck
39	Farmingdale	Monmouth Beach	Aberdeen
40	Highlands	Manasquan	Hazlet
41	Lake Como	Fair Haven	Holmdel
42	Spring Lake	Colts Neck	Howell
43	Avon-by-the-Sea	Shrewsbury Borough	Manalapan
44	Freehold Borough	Brielle	Middletown
45	Keansburg	Rumson	Keyport
46	Red Bank	Loch Arbour	Roosevelt
47	Allenhurst	Marlboro	Marlboro
48	Sea Bright	Union Beach	Farmingdale
49	Belmar	Sea Girt	Fair Haven
50	Long Branch	Millstone	Matawan
51	Bradley Beach	Upper Freehold	Little Silver
52	Asbury Park	Interlaken	Shrewsbury Borough
53	Deal	Little Silver	Allentown

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning



Image 6: Shark River Park, Wall Township (Source: Monmouth County Park System)

Occupied Housing Tenure

Of the estimated 261,139 housing units counted in the 2018 American Community Survey, 233,874 (89.6%) were reported as occupied. Of that 66.0% were owner occupied and 23.6% were renter occupied. Comparatively, the 2010 census reported Monmouth County having 232,513 occupied units out of 256,504 total units; of which 68.8% were owner occupied and 21.9% were renter occupied. Between 1990 and 2010, the number of total housing units increased by 32,794. Table 9.3 represents the percentages of owner-occupied, renter-occupied, and vacant housing units for the County as a whole.

Table 9.3: Countywide Housing Occupancy by Year

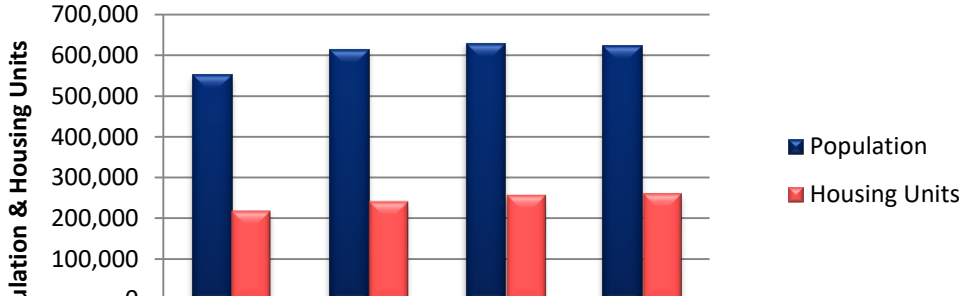
Year	Total Number of Units	Owner-Occupied		Renter-Occupied		Total Occupied		Vacant	
		Total	Percent	Total	Percent	Total	Percent	Total	Percent
1990	218,408	143,572	65.7%	53,998	24.7%	197,570	90.5%	20,838	9.5%
2000	240,884	167,273	69.4%	56,963	23.6%	224,236	93.1%	16,648	6.9%
2010	256,504	176,366	68.8%	56,147	21.9%	232,513	90.6%	23,991	9.4%
2018 (Est.)	261,139	172,322	66.0%	61,552	23.6%	233,874	89.6%	27,265	10.4%

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

Residential Trends

Both population and housing units generally share an upward trend, with population growth serving as a major contributory factor to housing expansion. However, the growth rates of Monmouth County's population and housing units have differed over the past fifty years. Between 1950 and 1970, the County's population increased by approximately 43.2% each decade, outpacing the rate of housing expansion. During the same time period, the number of housing units in the County increased approximately 35.0% per decade. The 1970's and 1980's brought significant residential growth to the County with the number of housing units increasing by 20%, while population growth averaged 10%. Between 1990 and 2000, the County's population grew 11.2% as compared to the number of housing units which increased 10.3%. The 2010 Census reported Monmouth County had 256,504 housing units, an increase of 6.4% from 2000. Over the same time period, the population only grew by 2.5%.

Figure 11: Population and Housing Growth Rate Comparison



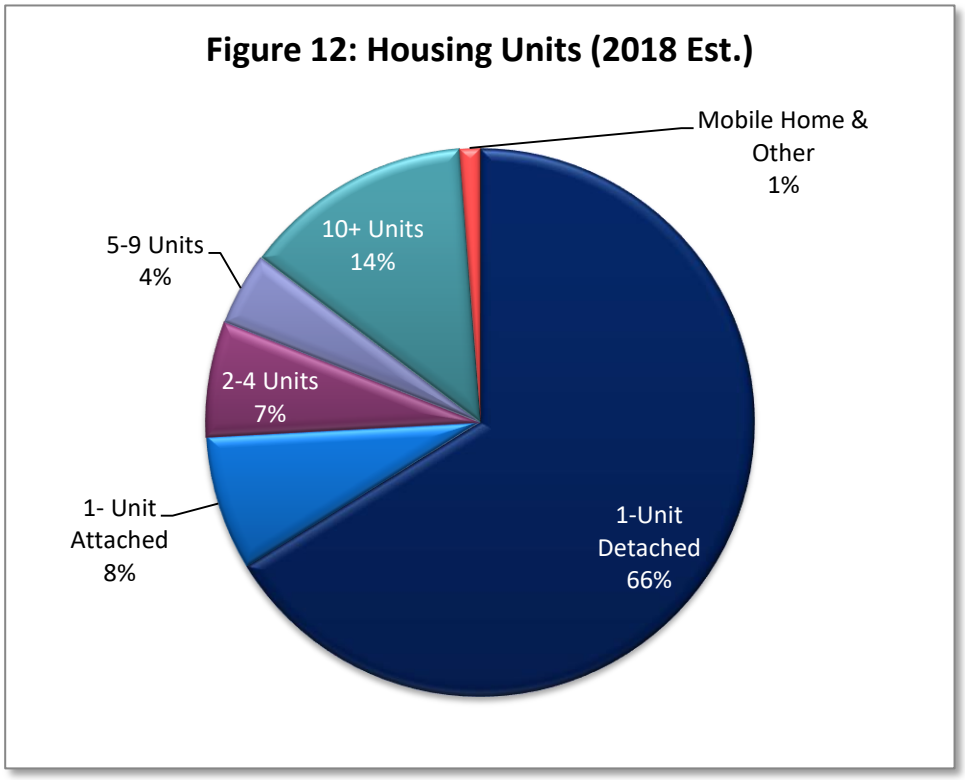
	1990	2000	2010	2018 (Est.)
Population	553,124	615,301	630,380	623,387
Housing Units	218,408	240,884	256,504	261,139

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

Table 9.4: Population and Housing Growth Rate Comparison				
Year	Population		Housing	
	Total	% Change	Total	% Change
1990	553,124	9.9%	218,408	20.8%
2000	615,301	11.2%	240,884	10.3%
2010	630,380	2.5%	256,504	6.5%
2018 (Est.)	623,387	-1.1%	261,139	1.8%

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

Between 1990 and 2018, the County saw a gain of 42,731 housing units, a 19.6% increase. To compare, over the same time the total population grew by 70,863 people (12.7%). Over the years, new residential development within the County has been predominately single-family housing. Since 1990, the number of single family homes grew by 34,727 units; 29,163 detached and 5,564 attached. In 1990, single-family attached (e.g. townhomes, duplexes) encompassed 6.9% of all housing units; in 2018 this category encompassed 7.9% of all housing units. During the same period, multi-family units increased by an estimated 11,236 units or 21.2%. A significant portion of this growth occurred in developments having ten or more units. Between 2000 and 2018, this development category increased by an estimated 7,072 units (25.1%). Figure 12 and table 9.6 go into detail about the types of residential units that makeup the County.



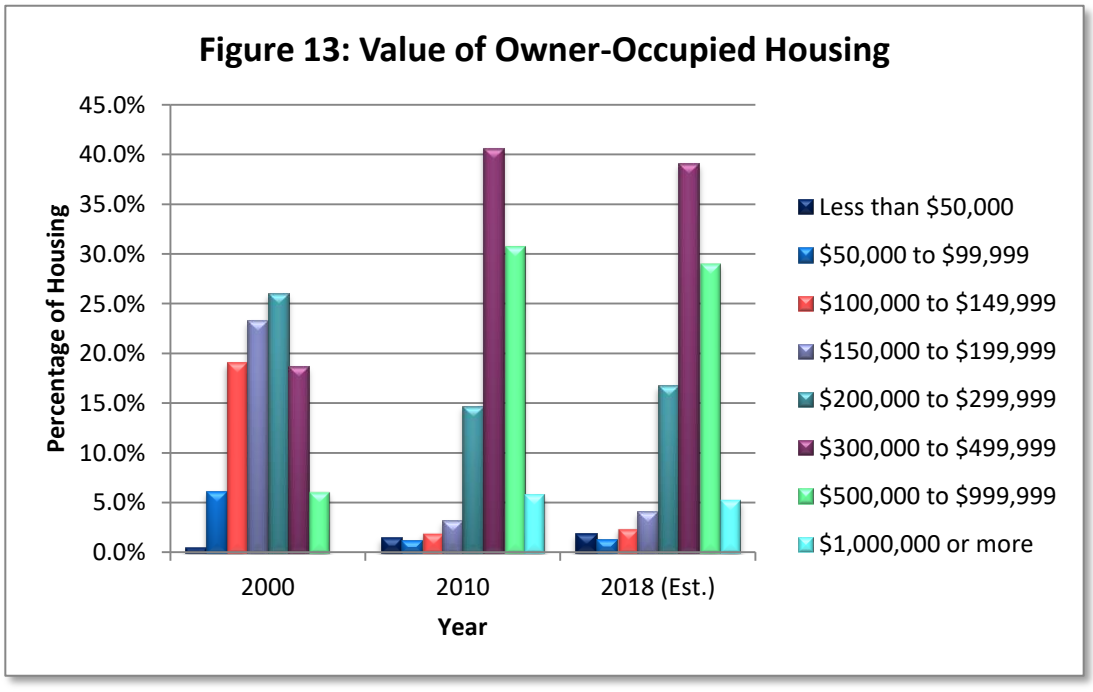
Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

Table 9.5: Number of Housing Units by Type								
	1990		2000		2010		2018 (Est.)	
Type of Unit	Total	% of Total	Total	% of Total	Total	% of Total	Total	% of Total
1-Unit Detached	143,754	65.8%	161,048	66.9%	168,291	65.6%	172,917	66.2%
1- Unit Attached	15,151	6.9%	19,766	8.2%	20,202	7.9%	20,715	7.9%
2-4 Units	17,364	8.0%	19,031	7.9%	19,715	7.7%	17,751	6.8%
5-9 Units	8,703	4.0%	9,520	4.0%	11,091	4.3%	11,275	4.3%
10+ Units	27,019	12.4%	28,224	11.7%	33,718	13.1%	35,296	13.5%
Mobile Home & Other	6,417	2.9%	3,295	1.4%	3,487	1.4%	3,185	1.2%
Total Housing Units	**218,408**		**240,884**		**256,504**		**261,139**	

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning

Value of Owner-Occupied Housing

Data collected for May 2020, from Realtor.com states that the median list price of a home in Monmouth County is about $495,000 with a median sale price of $512,000. The median list price for a single family home is $535,000, with a median sale price of $560,000. Condos have a median list price of $338,950, and a median sale price of $357,500. In addition, townhomes have a median list price of $356,950, and a median sale price of $430,000. On average a home in Monmouth County in 2020 will sell in roughly 80 days. Figure 13 and table 9.7 show the value of owner-occupied housing and how it has changed from 2000 to 2018. This is calculated in order to better define residential home values.



Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning
*For the year 2000, housing value of $500,000+ is combined into one category.

Table 9.6: Value of Owner-Occupied Housing						
	2000		2010		2018 (Est.)	
Owner-Occupied Units	**Total**	**% of Total**	**Total**	**% of Total**	**Total**	**% of Total**
Total Housing Units	149,975		176,366		172,322	
Less than $50,000	787	0.5%	2,643	1.5%	3,319	1.9%
$50,000 to $99,999	9,228	6.2%	2,223	1.3%	2,279	1.3%
$100,000 to $149,999	28,652	19.1%	3,547	2.0%	4,221	2.4%
$150,000 to $199,999	34,944	23.3%	5,656	3.2%	7,031	4.1%
$200,000 to $299,999	39,000	26.0%	25,964	14.7%	28,884	16.8%
$300,000 to $499,999	28,104	18.7%	71,729	40.7%	67,448	39.1%
$500,000 to $999,999	9,260	6.2%	54,343	30.8%	50,085	29.1%
$1,000,000 or more	N/A	N/A	10,261	5.8%	9,055	5.3%
Owner Occupied	**149,975**		**176,366**		**172,322**	
Renter Occupied	**56,963**		**56,147**		**61,552**	
Median Housing Value	**$203,100**		**$424,800**		**$408,400**	
Median Rent	**$759**		**$1,137**		**$1,402**	

Source: U.S. Census Bureau: Compiled by the Monmouth County Division of Planning
*Shaded yellow sections categorized housing values by $500,000+ for 2000 Census

Residential Building Permits

In 2018, 1,792 building permits for single and multi-family housing were filed in Monmouth County, a 4% increase from the 1,729 permits filed in 2017. In 2018 Monmouth County accounted for 7.1% of the single and multi-family dwelling permits issued within the State. The 1,792 filed building permits broke down as follows: 824 one and two-family dwellings, 958 multi-family dwellings and 10 mixed-use dwellings. To compare, in 2017 this break down was: 912 one and two family dwellings, 792 multi-family dwellings, and 25 mixed-use dwellings. (Note: 2019 Permit data was not available)

Table 9.7: Residential Building Permits Issued for Selected New Jersey Counties								
	2012	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**% of State**
Monmouth	**1,034**	**1,425**	**1,367**	**1,176**	**1,901**	**1,729**	**1,792**	**7.1%**
Ocean	1,517	2,467	3,328	2,934	1,712	2,757	2,052	8.1%
Middlesex	1,087	1,587	1,809	1,588	1,959	2,311	2,238	8.9%
Burlington	488	553	977	748	634	832	1,132	4.5%
Somerset	1,060	1,061	689	848	839	564	1,184	4.7%
New Jersey	15,270	18,795	22,896	19,503	24,170	25,961	25,280	

Source: New Jersey Department of Community Affairs: Compiled by the Monmouth County Division of Planning

10. Authorized Construction

Authorized Non-Residential Square Footage by Usage

The following square footage data comes from The New Jersey Department of Community Affairs, which is then simplified and compiled by the Monmouth County Department of Planning staff. The data is converted into five categories of usages to better define of the overall usage of the authorized developable square footage within the County. Table 10.1 represents the total authorized non-residential square footage of development broken down by use.

Calculation Methodology:

The categories are labeled as follows: (Determined by the New Jersey Department of Community Affairs)

- A-1
- A-2
- A-3
- A-4
- A-5
- Multifamily / Dormitories
- Hotel / Motel
- Education
- Industrial
- Hazardous
- Institutional
- Storage
- Signs, Fences, Utility & Misc.

The labeled categories are compiled as follows: (Determined by the Monmouth County Division of Planning)

- Office
- Retail
- Commercial = Multifamily / Dormitories, Hotel / Motel, Storage, Signs / Fences/ Utility & Misc."
- Industrial = Industrial, Hazardous
- Other Non-Residential = Agricultural related (A-1, A-2, A-3, A-4, A-5), Education, Institutional

The trend since 2000 seems to relatively stable in regards to overall construction for each usage. The outlier years are 2001 and 2003 when development had the two highest peaks in nearly two decades, where office and retail development were at their highest. Overall there was a decrease in development from 2010 to 2015. After 2015, office and retail development decreased substantially, while commercial development began to increase year over year until 2019. Over the past two years there has been a noticeable increase in number of warehouse applications that have come before the County. This is most likely in a response to the growth of the e-commerce industry and the demand for warehousing locations with easy access to the New Jersey Turnpike. This includes major roadways in Monmouth County such as Interstate 195 and State Route 33 which intersect the New Jersey Turnpike. Table 10.1 goes into detail in regards to non-residential growth.

Table 10.1: Authorized Non-Residential Square Footage by Usage						
Year	Office	Retail	Commercial	Industrial	Other Non-Residential	Total
2000	919,706	467,781	2,161,057	6,191	989,571	4,544,306
2001	2,139,809	907,351	1,439,989	165,088	1,306,559	5,958,796
2002	864,862	793,943	1,424,537	232,859	628,922	3,945,123
2003	1,072,640	1,095,326	2,189,493	142,539	1,167,801	5,667,799
2004	776,676	380,576	1,943,075	48,535	1,638,427	4,787,289
2005	672,563	531,289	1,967,189	16,579	554,805	3,742,425
2006	973,008	197,248	2,622,258	54,417	1,185,389	5,032,320
2007	968,794	400,940	2,219,680	40,000	384,861	4,014,275
2008	318,418	414,612	1,194,046	33,185	258,139	2,218,400
2009	293,900	61,926	841,974	108,001	559,545	1,865,346
2010	343,680	282,233	881,948	7,937	170,136	1,685,934
2011	320,603	104,300	815,486	66	70,987	1,311,442
2012	249,063	233,940	964,282	194,966	188,497	1,830,748
2013	340,222	177,855	1,322,763	29,600	313,407	2,183,847
2014	282,481	312,136	865,604	2,480	327,589	1,790,290
2015	384,157	160,413	1,150,854	1,920	225,298	1,922,642
2016	547,984	145,787	2,246,991	36,569	795,203	3,772,534
2017	110,882	110,882	2,377,508	11,653	848,486	3,459,411
2018	414,509	265,417	2,582,430	0	408,313	3,670,669
2019	306,076	115,411	896,010	154,580	402,884	1,874,961

Source: New Jersey Department of Community Affairs: Compiled by the Monmouth County Division of Planning

Non-Residential Construction Projects

Table 10.2 represents the top 15 non-residential projects by square footage in Monmouth County in 2019.

Table 10.2: 2019 Top 15 Non-Residential Projects by Square Footage

Rank	Municipality	Project Name	Use	Square Footage	Approval Status
1	Howell Township	Monmouth Commerce Center	Warehouse/Distribution	1,242,102	RI
2	Manalapan Township	Manalapan Logistics Center	Industrial	616,125	FA
3	Tinton Falls Borough	JSM at Tinton Falls - Shipping & Receiving Center	Shipping & Receiving Center	240,000	RI
4	Eatontown Borough	Brightview Eatontown	Congregate Care/Assisted Living	196,329	CA
5	Howell Township	289 Squankum Road	Warehouse/Office Flex Space	139,550	RI
6	Middletown Township	Life Time Facility	Sport, Fitness, Wellness Center	120,423	CANR
7	Wall Township	Metro Self-Storage Facility	Self-Storage Facility	115,800	FA
8	Howell Township	413 Oak Glen Road	Office/Warehouse	72,000	UV
9	Marlboro Township	Marlboro Technology Park	Warehouse/Office	63,144	FA
10	Tinton Falls Borough	369 Essex, LLC - Warehouse	Warehouse/Office Building	62,100	FA
11	Wall Township	Wall Storage Associates Expansion	Self-Storage Expansion	61,575	CA
12	Manalapan Township	Stavola-Woodward Road	Assisted Living Facility	57,773	FA
13	Ocean Township	Seaview Square Shopping Center	Shopping Center	50,657	CANR
14	Long Branch City	Broadway Place - Phases 1 & 2	Mixed Use	48,900	FA
15	Marlboro Township	Proposed Office/Warehouse Building	Office/Warehouse	46,299	FA

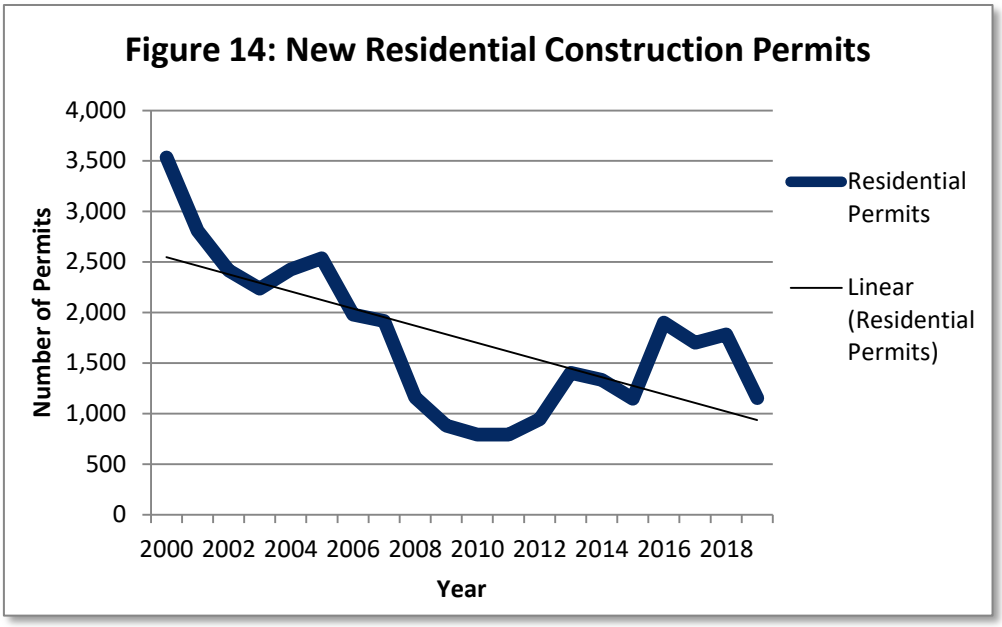
Compiled by the Monmouth County Division of Planning

Approval Status Key:

CA – Conditional Approval
CANR – County Approval Not Required
FA – Final Approval
RI – Request Information
UV – Use Variance

New Residential Construction Permits

According to data collected from the New Jersey Department of Community Affairs, in 2018 Monmouth County reviewed 8 residential based mixed-use projects, 15 less than in 2017. The graph below shows the number of mixed use applications submitted by year. The overall number of residential permits has had a general decrease over time with a drop from 2009-2012. Figure 10 and table 10.3 represent these trends.



Source: New Jersey Department of Community Affairs: Compiled by the Monmouth County Division of Planning

Table 10.3: New Residential Construction Permits		
Year	**Residential Permits**	**Mixed-Use Applications**
2000	3,534	N/A
2001	2,809	N/A
2002	2,417	N/A
2003	2,237	N/A
2004	2,428	7
2005	2,536	14
2006	1,980	2
2007	1,918	21
2008	1,159	29
2009	880	4
2010	791	0
2011	791	0
2012	946	8
2013	1,405	10

Year	Residential Permits	Mixed-Use Applications
2014	1,335	21
2015	1,146	5
2016	1,901	11
2017	1,702	23
2018	1,783	8
2019	1,153	4

Source: New Jersey Department of Community Affairs: Compiled by the Monmouth County Division of Planning

Since the New Jersey Supreme Court began approving municipal housing plans, the County may expect an increase in housing proposals by developers as prior market uncertainties have been remedied. Table 10.4 represents the top 10 residential projects by the number of units included in 2019.

Residential Construction Projects

Table 10.4: 2019 Top 10 Residential Projects by Number of Units

Rank	Municipality	Project Name	Use	Number of Units	Approval Status
1	Middletown Township	Middletown Walk	Residential Townhomes	350	CA
2	Long Branch City	Broadway Place - Phases 1 & 2	Mixed Use	339	FA
3	Red Bank Borough	176 Riverside Mixed-Use	Multi-Family/Office/Retail	210	FA
4	Wall Township	Glen Oaks at Wall	Affordable Multi-Family Residential	180	FA
5	Hazlet Township	Highview at Hazlet	Multi-Family Residential	172	FA
6	Howell Township	Four Seasons at Colts Farm	Age-Restricted Housing	114	FA
7	Marlboro Township	Buckdale Major Subdivision	Single Family Residential	47	FA
8	Asbury Park City	Bangs Avenue Redevelopment	Mixed Use Retail/Residential	42	CANR
9	Marlboro Township	Gina Hill Farms	Residential	22	RI
10	Manalapan Township	Preserve at Lamb Lane	Residential	19	RI

Compiled by the Monmouth County Division of Planning

Approval Status Key:

CA – Conditional Approval

CANR – County Approval Not Required

FA – Final Approval

RI – Request Information

UV – Use Variance

11. Facilities & Infrastructure

11.1 Transportation

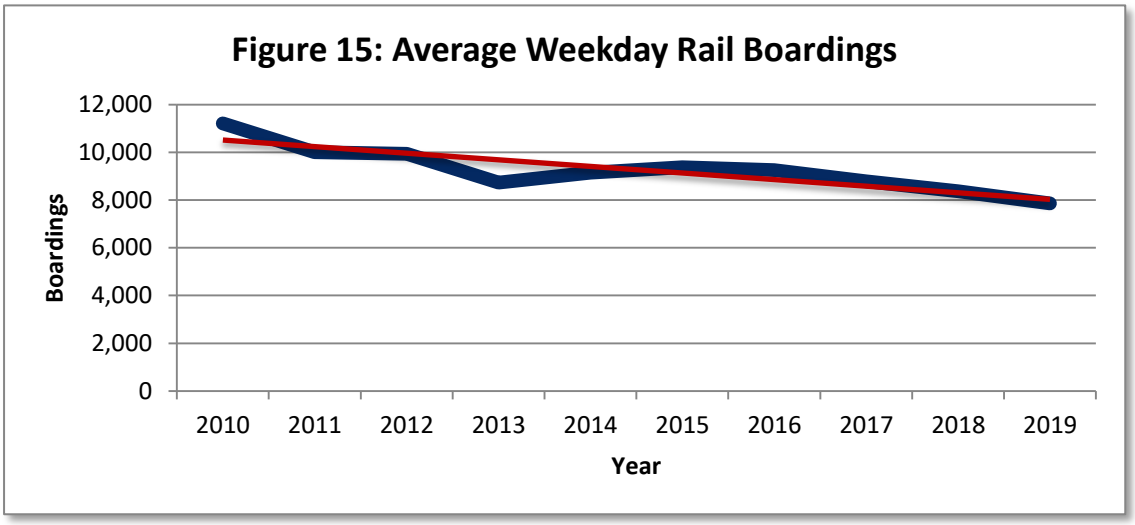
Multiple modes of transportation provide Monmouth County residents with convenient links to both the New York City and Philadelphia metro regions. 27 miles of the Garden State Parkway traverse the eastern portion of the County, connecting with Atlantic City to the south, with Newark and New York City to the north. 17 miles of Interstate 195 run east/west through the southern portion of the County, providing connections to the New Jersey Turnpike, Mercer County, Pennsylvania, and the Atlantic coastline. In addition, there are approximately 233 miles of State roads and 381 miles of County roads.

11.1.1 Rail

The NJ Transit North Jersey Coast Line provides rail access to employment and transportation centers in Newark, Hoboken, and New York City. Within the County there are 13 year-round stations, as well as a seasonal rail station located at Monmouth Park Racetrack in Oceanport, operating during the live racing season which extends from May through October.

Monmouth County residents have access to Amtrak's Northeast Regional (Northeast Corridor) rail service at the New Brunswick and Metropark stations in Middlesex County, and Princeton Junction station in Mercer County. NJ Transit's AirTrain station, located just south of Newark Penn Station, provides a five-minute direct monorail ride to the terminals and parking lots at Newark Liberty International Airport.

Data provided by NJ Transit shows that the Monmouth County North Jersey Coast line stations weekday ridership in descending order are Aberdeen-Matawan Station, Middletown, and Red Bank. Aberdeen-Matawan is the busiest station on the entire Coastline, followed by Woodbridge in Middlesex County and Middletown. The table below provides average weekday ridership for Monmouth County stations between FY 2010 and FY 2018. As the table shows, ridership for all stations has been declining since 2010. Between FY 2010 and FY 2018 ridership declined by 25%. (Note: 2019 ridership numbers were not available)



Source: New Jersey Transit: Compiled by the Monmouth County Division of Planning

Table 11.1: Average Weekday Rail Boardings											
Station	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**	**Change since 2010**
Aberdeen-Matawan	2,872	2,567	2,554	2,275	2,370	2,509	2,460	2,337	2,207	1,668	-41.9%
Hazlet	986	873	876	787	844	874	874	855	805	832	-15.6%
Middletown	1,807	1,571	1,487	1,297	1,327	1,351	1,331	1,262	1,196	1,200	-33.6%
Red Bank	1,436	1,278	1,276	1,139	1,187	1,182	1,155	1,068	1,013	981	-31.7%
Little Silver	925	837	783	687	732	744	740	709	679	697	-24.6%
Long Branch	1,241	1,114	1,171	1,050	1,116	1,119	1,105	1,050	1,024	1,032	-16.8%
Elberon	198	176	117	108	110	110	117	115	108	118	-40.4%
Allenhurst	163	153	140	127	127	126	125	123	119	134	-17.8%
Asbury Park	576	511	597	486	528	543	548	514	497	479	-16.8%
Bradley Beach	273	262	271	212	226	223	225	196	197	191	-30.0%
Belmar	309	257	305	255	263	267	256	241	226	221	-28.5%
Spring Lake	213	194	162	132	143	149	152	147	145	144	-32.4%
Manasquan	218	212	208	177	173	177	175	164	161	166	-23.9%
Total Weekday	11,217	10,005	9,947	8,732	9,146	9,374	9,263	8,781	8,377	7,863	-29.9%

Source: New Jersey Transit: Compiled by the Monmouth County Division of Planning

Beginning on May 18, 2015, one seat rail service from Bay Head to New York City became available during the AM and PM peaks. Passengers traveling or boarding south of Long Branch were no longer required to transfer. This change was due in part to the usage of hybrid locomotives, as diesel locomotives are not permitted in the tunnels under the Hudson River. NJ Transit announced that six trains operate from Bay Head to New York and New York to Bay Head. Three run from Bay Head to New York during the morning rush hour, and three run from New York to Bay Head during the evening rush hour. The service is only offered during the weekday, expediting commuter service south of the Long Branch station. Since the one-seat service inception, a fourth trip has been added in the evening from New York to Bay Head, for a total of seven trips every weekday.

There are several active initiatives underway to increase passenger rail capacity between New Jersey and Manhattan. Amtrak's Gateway Project proposes the construction of two flood-resistant Trans-Hudson tunnels, replacement of the existing Portal Bridge and expansion of New York Penn Station. The project will include:

- Four new main line tracks connecting Newark, NJ and Secaucus to two newly constructed rail tunnels
- The replacement of the Portal Bridge which is a choke point for trains
- The expansion of Penn Station, including new platforms under the neighboring Post Office building
- Updates and modernization of existing train infrastructure such as the electrical system providing power to trains
- The rebuilding and replacing of components in the existing tunnels which were damaged by sea water as a result of Super Storm Sandy

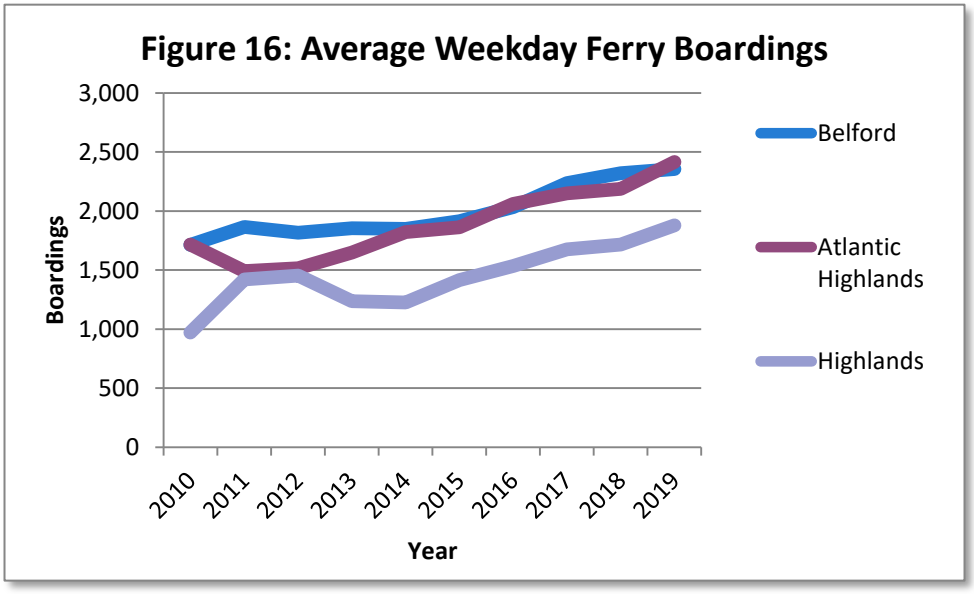
- The construction of two new rail tunnels beneath the Hudson River connecting New Jersey to Penn Station

The Amtrak Gateway Project is said to have an estimated cost between $20 billion and $30 billion. At one point $541 million of federal funding was made available for The Gateway Project was included in a Federal Funding Bill; Amtrak is expected to contribute a minimum of $388 million from its Northeast Corridor Account, while New York and New Jersey are expected to receive an additional $153 million from the Federal Transit Administration's High-Density States and State of Good Repair grant programs that they are dedicating to the project. The Gateway Project is also eligible for funds through the New Starts Capital Investment Grant Program which was allocated $2.64 billion. Two applications have already been submitted to this program. One to replace the Portal Bridge, which has recently been approved through a $600 million bond from New Jersey and more financing to be received from the federal government. The second project in the program is the new Hudson Tunnel Project. The states of New York and New Jersey have also promised to contribute additional state funds. But the project has not been awarded any sort of funding because the two states have not currently fronted enough funding for the project.

The existing rail tunnels were damaged by flooding after Superstorm Sandy and are in immediate need of repair, but closing one tunnel down for repairs would decrease the rail traffic significantly and create major backups. Under the Gateway Project, the maintenance of the existing tunnels would be done after the completion of a new tunnel, therefore avoiding a decrease in rail traffic. After repairs all tunnels would be open and rail capacity into Penn Station would double. In 2018 the project received $70 million in funding for preliminary work, $35 million from the Port Authority and $35 million from Amtrak as well as a $16 million TIGER Grant that was awarded to NJ Transit to help replace the Portal Bridge.

11.1.2 Ferry

Monmouth County has one seasonal and three year round ferry terminals, all of which are located in the northern part of the county along the Raritan Bayshore. The Belford terminal is serviced by NY Waterway, while the Atlantic Highlands and Highlands terminals are serviced by SeaStreak. A seasonal terminal in Sandy Hook is operated by SeaStreak from Memorial Day to Labor Day. Overall, average weekly boardings have increased year over year at each of the terminals, with a few years of slight decreases. This equates to a combined 51.0% increase in weekly ridership from all three ferry terminals (Sandy Hook is not included in this calculation) The most notable increase in ridership is the Highlands terminal with an increase of 93.2% in average weekly boardings since 2010. Figure 16 and table 11.2 represents the Average Weekly Boardings from 2010 through 2019



Source: Port Authority of New York and New Jersey: Compiled by the Monmouth County Division of Planning

Table 11.2: Average Weekday Ferry Boardings

Station	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Change since 2010
Belford	1,715	1,866	1,817	1,855	1,850	1,915	2,033	2,237	2,320	2,357	37.4%
Atlantic Highlands	1,717	1,491	1,517	1,650	1,823	1,862	2,062	2,149	2,189	2,415	40.7%
Highlands	972	1,421	1,453	1,236	1,226	1,416	1,536	1,677	1,717	1,878	93.2%
Total Weekly	4,404	4,778	4,787	4,741	4,899	5,193	5,631	6,063	6,226	6,650	51.0%

Source: Port Authority of New York and New Jersey: Compiled by the Monmouth County Division of Planning
*Sandy Hook Is excluded in these calculations

11.1.3 Airports

Newark Liberty International Airport is accessible by car from all regions of Monmouth County. For western Monmouth municipalities, the NJ Transit 67 bus route (connecting Toms River and Jersey City) provides direct trips to the bus courtyards at Terminals A, B, and C. The AirTrain monorail provides rail access to the airport from North Jersey Coast Line passenger trains stopping at the Newark Liberty International Airport station. AirTrain travels between the terminals, rental car facilities, hotel shuttles, and central parking lot areas. Furthermore, many residents are within a one-hour drive of Philadelphia International Airport, Trenton Mercer Airport, and Atlantic City International Airport. Private car services provide residents connections to all the major regional airports.

The Monmouth Jet Center (formerly known as the Monmouth County Executive Airport and the Allaire Airport) located in Wall, is available for local charter and corporate flights. The owners of the airport, Wall Aviation, are in the process of turning the airport into a modern Jetport. Wall Aviation is investing millions of dollars to modernize the airport. The planned upgrades include new facilities, a new operator, new fuel provider,

and installation of air traffic controllers (the airport has not had controllers since 1960). Airport safety has also been improved with new security fencing that prevents vehicles from accessing the runway area's and runway lights that are permanently on. The airport has the largest private runway in New Jersey and one of the longest in the U.S.

11.1.4 Bus

A considerable portion of the County is served by an extensive network of local and regional bus services. Monmouth County continues to work towards the expansion and enhancement of bus routes to better serve workers and industry in the County. Senior citizens and residents with special needs can utilize Monmouth SCAT (Special Citizen Area Transportation) services. NJ Transit and private buses (e.g. Academy) serve the Route 9 and Garden State Parkway corridors with connections to major employment destinations such as Jersey City, Newark, and New York City.

The NJ Transit 836 Bus Route connects the City of Asbury Park and Freehold Township, providing residents access to local job centers. Funding to extend this service on weeknights and weekends is made possible thanks to a New Jersey Job Access and Reverse Commute (NJ-JARC) grant and matching County funds. The purpose of NJ-JARC support is to link workers with low income, with employment that is normally inaccessible by transit. Bus service between Freehold Township and the City of Asbury Park now runs seven days a week from 5:30 A.M. to 10:40 P.M. with service terminating in Asbury Park at 11:50 P.M. NJ Transit acknowledges that the 836 Bus Route has become one of the most successful JARC programs in the state.

In January 2015, the North Jersey Transportation Planning Authority (NJTPA), Monmouth County, and Together North Jersey completed a Bus Rapid Transit Opportunities Study. The project addresses the potential for implementing strategies and features consistent with Bus Rapid Transit (BRT) systems and encourages their development in order to improve bus service in Monmouth County.

In September 2016, NJ Transit made bus route adjustments designed to improve access to Brookdale Community College's Lincroft Campus. The 833 route was combined with NJ Transit's 835 routes to create the new 838 route, which now operates between the Freehold Raceway Mall and Sea Bright. The 838 route runs hourly, offering a one-seat ride to Brookdale College or Freehold Township for residents traveling from Sea Bright, Rumson, Fair Haven and eastern Red Bank. The 838 also operates between Sea Bright and Lincroft on Saturdays, running every 85 minutes. The adjustments expanded access to the college's Lincroft campus, which was previously served by the 833 bus route running between Freehold Township and Red Bank. The 833 route previously ran every 70 minutes between 7:30 a.m. and 7:15 p.m. and provided no weekend service.

In February 2017, the Port Authority of New York and New Jersey approved $70 million to begin planning for a new bus terminal in Manhattan. The new bus terminal would replace the existing terminal on Manhattan's west side which is operating beyond capacity. The Port Authority also adopted a 10-year capital plan, which allocates $3.5 billion to replace the existing terminal. The terminal could end up costing as much as $10 billion and take more than 10 years to complete. Current planning efforts are taking place to evaluate whether building a new terminal on an adjacent property, building on top of the current terminal, or moving the terminal to a new location is the best option for the future Port Authority Bus Terminal.

11.2 Infrastructure

Projects

Below is the total list of the County infrastructure projects and status being led by the Monmouth County Division of Engineering.

Table 11.3: County Transportation Improvement Projects	
Monmouth County	**Status**
Brielle & Manasquan, Monmouth County Three Bridges (W-7, W-8, W-9)	Planning
Colts Neck - Routes 34 & 537 Intersection Improvements	Completed
Freehold & Howell - Halls Mill Road and Elton-Adelphia Road (CR524)	Under Construction
Freehold – West Main Street (CR537)	Planning
Middletown-Valley Drive/Locust Avenue (CR8A) and Navesink Avenue (CR8B)	Planning
Millstone–Stage Coach Rd., Millstone Rd., and Paint Island Spring Rd.	Planning
Ocean, Eatontown & Tinton Falls- West Park Avenue (CR14)	Planning
Rumson & Middletown - Oceanic Bridge (S-31)	Planning
Rumson & Sea Bright - Rumson - Sea Bright Bridge (S-32)	Planning
Tinton Falls - Sycamore Ave (CR13A)/Hance Ave(CR51)/Hope Rd	Under Construction
Upper Freehold - Replacement of Bridge U-45	Completed
Upper Freehold -Sharon Station Road (CR539A) Improvement Project	Under Construction

Source: Monmouth County Engineering

Table 11.4 represents the awarded construction projects from the New Jersey Department of Transportation that pertains to Monmouth County only. This excludes any maintenance or multi-jurisdictional projects with entities outside of the County. The total construction value for these awarded contracts amounts to $38,462,013.57.

Table 11.4: NJ Department of Transportation Awarded Projects				
Award Date	**Project Number**	**Program / Project Name**	**Project Type**	**Project Cost**
3/15/2019	NHP-0195(304)	Rt. 195 WB, RT. 295 to CR 524/539 (Old York Rd.)	Pavement Preservation / Safety Improvement	$9,362,340.40
5/23/2019	NHP-0033(312)	Rt. 35, CR 527 (Millhurst Rd. / Sweetmans Ln.)	Intersection Improvement	$7,200,000.00
6/5/2019	NHP-0035(326)	Rt. 35, CR 4 (Holmdel Rd. / Main St.) to Rt. 9	Intersection Improvement	$3,803,256.24
6/21/2019	NHP-0034 (303)	Rt. 34 Bridge over former Freehold & Jamesburg Railroad	Bridge Improvement	$9,650,656.98
11/14/2019	NHP-0018(304)	Rt. 18, Rt. 138, Rt. 34	Pavement Preservation	$8,445,759.95
			Total Cost	**$38,462,013.57**

Source: New Jersey Department of Transportation: Compiled by the Monmouth County Division of Planning

Green Infrastructure

Monmouth County possesses a wide diversity of landscapes: from the Navesink Highlands of the Bayshore Region, the shoreline and rivers of the Coastal Region, and the rolling hills and farmland of Western Monmouth. The County has 27 miles of oceanfront beaches, 26 miles of Raritan Bay shoreline, and numerous miles of lake and river fronts.

The natural environment is further enhanced by over 50,000 acres of protected public open spaces. The Monmouth County Park System has a combined 17,379 acres of developed parks/ sites that they own and/ or operate. Table 11.5 details the total acres of each park or tract of land, along with their usage.

Table 11.5: Total Park Acreage (2019)			
Regional Parks	**11,049**	**Conservation Lands**	**224**
Bayshore Waterfront Park	229	Fisherman's Cove Conservation Area	55
Big Brook Park	432	Weltz Park	169
Clayton Park	450	**Open Lands**	**544**
Crosswicks Creek Park	2,346	Baysholm Tract	71
Freneau Woods Park	262	Durand Tract	94
Hartshorne Woods Park	779	Yellow Brook Tract	379
Holmdel Park	619	**Golf Courses**	**1,785**
Huber Woods Park	381	Bel-Aire Golf Course	121
Perrineville Lake Park	1,247	Charleston Springs Golf Course	817
Shark River Park	990	Hominy Hill Golf Course	262
Tatum Park	366	Howell Park Golf Course	348
Thompson Park	667	Pine Brook Golf Course	61
Turkey Swamp Park	2,281	Shark River Golf Course	176
Recreation Areas	**2,107**	**Greenways**	**1,268**
DeBois creek Recreation Area	165	Henry Hudson Trail	215
Dorbrook Recreation Area	535	Manasquan River Greenway	480
Fort Monmouth Recreation Area	9	Metedeconk River Greenway	457
Manasquan Reservoir Recreation Area	1,208	Swimming River Greenway	6
Wickatunk Recreation Area	98	Union Transportation Trail	110
Wolf Hill Recreation Area	92		
Special Use Areas	**402**	**Totals**	
Deep Cut Gardens	54	Regional Parks	11,049
East Freehold Showgrounds	81	Recreation Areas	2,107
Historic Longstreet Farm	9	Special Use Areas	402
Historic Walnford	36	Conservation Lands	224
Monmouth Cove Marina	10	Open Lands	544
Mount Mitchill Scenic Overlook	12	Golf Courses	1,785
Historic Portland Place	15	Greenways	1,268
Seven Presidents Oceanfront Park	38		
Sunnyside Equestrian Center	135	**Total Lands**	**17,379**
Swimming River Park	12		

Source: Monmouth County Park System

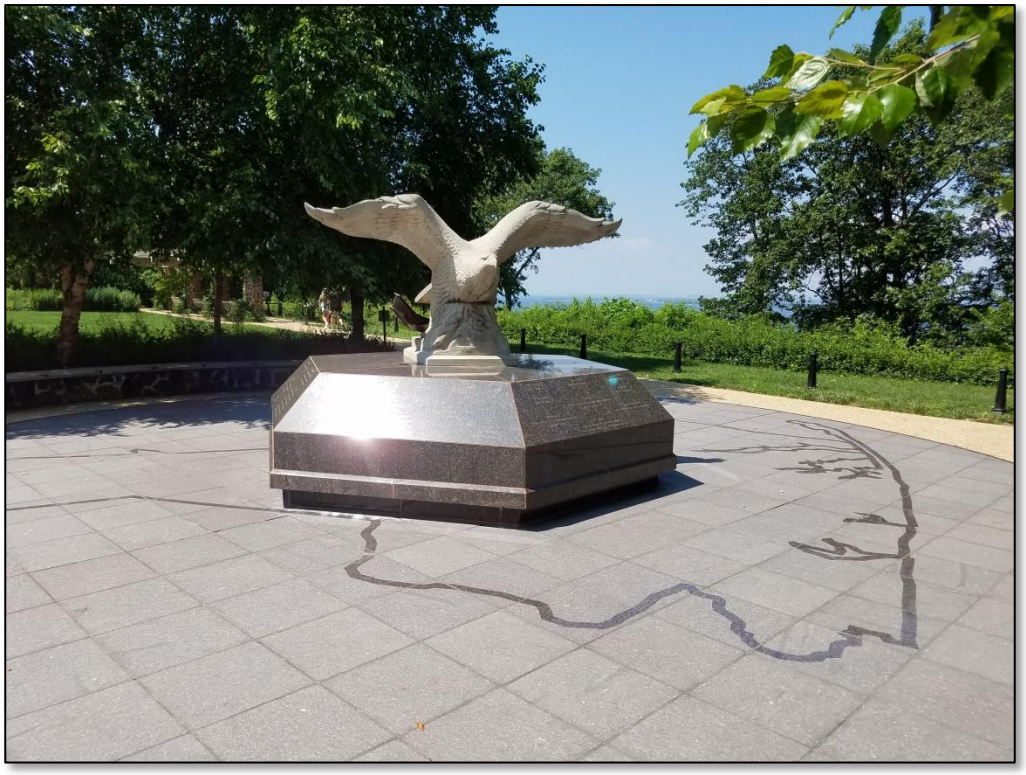


Image 7: Mount Mitchill Scenic Overlook, Atlantic Highlands (Source: Monmouth County Division of Planning)

In 2019, the Monmouth County Park System acquired a total of 782 acres of land. 336.1 acres were land additions, and 445.9 were in the form of easements. Table 11.6 represents those lands and where they are located, or how they are related to other parks within the County.

Table 11.6: 2019 Park System Land Acquisitions

Park	Acres
Bel-Aire Golf Course	7.5
Charleston Springs Golf Course	30.6
Freneau Woods Park	101.4
Henry Hudson Trail	18.7
Holmdel Park	46.0
Huber Woods	9.1
Manasquan River Greenway	39.2
Metedeconk River Greenway	40.1
Perrineville Lake Park	13.4
Turkey Swamp Park	1.9
Union Transportation Trail	0.3

Wickatunk Recreation Area	17.9
Yellow Brook Tract	10.0
Land Additions	336.1
Easements	445.9
Total	782.0

Source: Monmouth County Open Space Plan 2019: Monmouth County Park System: Compiled by the Monmouth County Division of Planning

Monmouth County Open Space Plan 2019

In 2019, the Monmouth County Park System completed the *Monmouth County Open Space Plan 2019.* Contained in the plan, are the current acreages of County parklands, trails, and recreation areas, in addition to what other open space lands are contained within the County boundaries. Of which include Gateway National Recreation Area - Sandy Hook, Allaire State Park, Cream Ridge Golf Course, and Monmouth Battlefield State Park. The idea behind this report is to stress the importance of open space to County residents, whether it is State, County or municipally owned open space. The plan includes how these lands are being acquired, improved, and used. It continues to discuss the open space needs, goals, action plans, and acquisition process, along with current and future projects.

Many of the lands are being acquired under the New Jersey Department of Environmental Protection (NJDEP) Green Acres Program. Monmouth County has also established the Monmouth County Municipal Open Space Grant Program (MCMOSGP) in order to assist municipalities meet their recreation needs for local residents. This program is funded through the County Open Space Trust Fund, allowing the allocation and distribution of $2 million per year for municipal open space improvements. These funds allow municipalities to develop or improve parks, purchase historic properties or structures, or acquire land for conservations purposes at a local level.

Table 11.7 represents the 2019 Municipal Open Space Grant funding allocations.

Table 11.7: Municipal Open Space Grant Program Allocations (2019)

Municipality	Project	Cost
Bradley Beach	North End Boardwalk Improvements	$180,000
Marlboro	Nolan Road Park Improvements	$200,000
Little Silver	Sickles Field/ Parker Homestead Parking & Picnic Area	$74,000
Matawan	Gravelly Park, Phase 3	$250,000
Union Beach	Scholer Park Improvements	$50,000
Aberdeen	Storyland & Ivy Hill Park Improvements	$180,000
Tinton Falls	Traditions Park Improvements	$200,000
Freehold Twp.	My Playground at Opatut Park	$190,000
Allentown	Sgt. George Ashby Memorial Park	$125,000
Manasquan	Clarke Property Acquisition	$250,000
Howell	Capital to Coast Trail Extension	$200,000
Middletown	Normandy Park Improvements	$250,000
Red Bank	Red Bank Park Improvements, Phase 2	$200,000

Eatontown	Nicodemus Gate Parcel Acquisition	$108,000
	Total	**$2,457,000**

Source: Monmouth County Park System: Compiled by the Monmouth County Division of Planning

The following quote is an excerpt written by the Secretary and Director of the Monmouth County Park System James J. Truncer, which is transcribed in the Monmouth *County Open Space Plan 2019.* It reads,

We encourage you to support efforts in your community to take advantage of state and county open space funding opportunities and grant programs to provide close-to-home open space and recreational opportunities. Your Monmouth County Park System is committed to:

- Purchasing – additional open space to enhance our quality of life
- Providing – opportunities for outdoor recreation and life fulfilling experiences
- Protecting – land and water resources for current and future generations
- Preserving – our natural, cultural, and recreational resources

Table 11.8 shows the other state, federal and municipal open space within Monmouth County. These parks or sites are managed outside the Monmouth County Park System, but still remain within the boundary of the County and are accessible for residents.

Table 11.8: Other State, Federal, & Municipal Open Space

Park	Acres	Park	Acres
Federal Open Space	**2,044**	Pleasant Run	500
Gateway National Recreation Area - Sandy Hook	2,044	Prospertown Lake	1,012
		Shark River Access	1
		Turkey Swamp	3,767
State Open Space	**17,033**	**Natural Lands Trust**	**90**
State Recreational Facilities	**6,289**	Whale Pond Brook	90
Allaire State Park	3,080		
Cheesequake State Park	576	**Municipal Open Space**	
Cream Ridge Golf Course	143	53 Municipality Total	16,750
Leonardo State Marina	10		
Monmouth Battlefield State Park	2,511	**Non-Profit Open Space**	
Twin Lights Historic Site	3	NJ Audubon - Scudder's Preserve	91
Spring Meadow Golf Course	209		
Swimming River Access	90	**Preserved Farmland**	
Wildlife Management Areas	**10,654**	11 Municipality Total	15,387
Assunpink & NJ Horse Park	6,254		
Imlaystown Lake	27	**Total**	**53,482**
Manasquan River	873		
Navesink River	64	Underline denotes different management/owner type	

Source: Monmouth County Park System: Compiled by the Monmouth County Division of Planning

Gray Infrastructure

The County's water supply is anticipated to adequately accommodate future development and population growth. According to the New Jersey Water Supply Plan 2017-2022, prepared by the New Jersey Department of Environmental Protection (2017), New Jersey has sufficient water available to meet needs into the foreseeable future provided the state effectively: increases water efficiency through conservation and reuse; promotes public education and outreach; addresses deteriorating infrastructure and ensure proper operation and maintenance of our water storage, treatment and distribution systems; pursues key water supply projects; and fully funds current monitoring efforts/assessment studies.

The Wastewater Management Plan (WMP) map for Monmouth County was adopted on April 11, 2013. This document combines municipal wastewater management planning service areas into a single cohesive plan.

NJDEP adopted new water quality management planning rules at NJAC 7:15 on November 7, 2016. The staff of the Monmouth County Division of Planning is currently in the process of developing a new Wastewater

Management Plan for Monmouth County. A complete draft was submitted to NJDEP in November of 2018, and is currently under review. The Division of Planning continues to process site specific amendments and revisions and update the Future Wastewater Service Area map as needed while the new draft plan is under review.

Educational Facilities

Brookdale Community College offers associate's degrees and certificates in over 50 programs. With six campuses located throughout Monmouth County, Brookdale continues to expand, currently serving over 14,000 full and part-time students. Top program completions include:

- Business, management, marketing and related support services
- Education
- Health Professionals and related programs
- Social Sciences

The Monmouth County Division of Planning continues to work with Brookdale on improving and enhancing transportation to, from, and between campuses.

The New Jersey Coastal Communiversity, an alliance of three New Jersey colleges and universities, offers access to over twenty-five baccalaureate and graduate degree programs at Brookdale's campuses. Participating schools include Georgian Court University, New Jersey City University, and Rutgers, the State University of New Jersey.

Monmouth University, situated on a historic 156-acre campus, is a comprehensive four-year private university, offering undergraduate and graduate degrees in over fifty majors and concentrations. In January 2018, the final phase of construction to upgrade the Science Building (Edison) was completed, which entailed removing an area of the pre-existing structure called The Link totaling 6,534 sqf. and replacing it with a 24,765 sqf. addition. The Science Building is now a state-of-the-art, fully-functioning academic space with new and improved teaching, laboratory and office spaces for students and faculty. It includes a large 90-seat Multi-Purpose Room, the School of Science Dean's office suite, the Urban Coast Institute suite, Biology and Chemistry offices, a spacious lobby and gathering areas, study rooms, and several teaching and faculty research laboratories, such as a vivarium, herbarium, and a tissue culture lab.

Over 50 private and parochial schools and 181 public schools comprise Monmouth County's educational system. In 2018, four County high schools were recognized in U.S. News and World Report's list of "America's Best U.S. High Schools":

- High Technology High School, Lincroft; ranked 57th nationally; 3rd in NJ
- Biotechnology High School, Freehold; ranked 85th nationally; 6th in NJ
- Academy of Allied Health and Science, Neptune; ranked 273rd nationally; 13th in NJ
- Marine Academy of Science and Technology ranked 391st nationally; 17th in NJ

12. Redevelopment Initiatives

Fort Monmouth Property: Eatontown, Tinton Falls, Oceanport

Fort Monmouth officially closed on September 15, 2011, with base functions permanently transferred to Maryland's Aberdeen Proving Ground. Comprised of 1,226 acres, the Fort Monmouth property is located within the borders of Eatontown, Tinton Falls, and Oceanport. The United States Army signed a Memorandum of

Agreement in June 2012, granting the Fort Monmouth Economic Revitalization Authority (FMERA) official control over the base property redevelopment. FMERA has been issuing Requests for Offer to Purchase (RFOTPs) which pave the way for redevelopment. These RFOTPs seek to attract residential units, destination retail, office and research space, and places of worship. In November 2016, FMERA purchased the remaining 560 acres for $33 million from the U.S. Army to accelerate a proactive approach in attracting developers and creating job growth in the County. The County backed the loans, allowing FMERA to take advantage of the County's AAA bond rating. FMERA currently controls the entire tract and has accelerated the closing of several pending projects. To date, nearly two-thirds of the Fort is sold, under contract, or in negotiations.

CommVault, the first company to set roots in Fort Monmouth in January 2013, was awarded the 2016 Leading Economic Development/ Redevelopment Award at the Governor's Conference on Housing and Economic Development. Radar Properties, LLC. purchased a 12.25-acre parcel located near CommVault in Tinton Falls including Building 2525, an 86,400 square foot former administration building. Radar has leased 30,000 square feet of space to its affiliate Aaski Technology. By consolidating its New Jersey operations and not relocating to Maryland, Aaski retained 105 jobs in the state with plans to add an additional 25 jobs. Furthering its goal of creating a technology hub, FMERA sold the Russel Hall parcel to private cloud computing company TetherView in 2017. TetherView subleased and renovated the building throughout 2016 and now has a permanent home on the third floor and several tenants in the remainder of the building including health service providers, tech companies, and a satellite Veterans' Connection office. In 2017, Vi Collaboration Hubs, a co-working venue that started at Bell Works, opened an additional space in Russel Hall.

The former Child Development Center in Tinton Falls was sold to Trinity Hall, an all-girls nonprofit school, in early 2015. Trinity Hall converted the 20,000 square foot former childcare facility into a modern educational setting for high school students and opened later that year. In early 2018, Trinity Hall received approval from Tinton Falls Planning Board to expand its campus with a two-story wing which will house additional classrooms, office space, a multipurpose room, a chapel, and an entrance lobby.

The first sale of Phase 2 property after FMERA closed with the U.S. Army and the first residential project underway at the Fort was the sale of the historic Officer Housing units in Oceanport to the RPM Development Group. RPM has historically renovated the units and began leasing in 2018 as Liberty Walk townhomes and apartments.

In 2017, there were several notable advances in the redevelopment of the Fort. The 171-acre Suneagles Golf Course and Megill Housing Area were purchased by Martelli Development Group. This property includes the historic Gibbs Hall, Joe's Sports Bar/19th Hole, 21 buildings of Megill Housing Area, in-ground swimming pool, tennis courts, maintenance facility, and pro-shop. As part of the sale, the purchaser has agreed to maintain it as a golf course for 40 years. Proposed improvements to the property include upgrades to the golf course, renovating Gibbs Hall into a banquet facility, and demolishing the vacant Megill military housing and constructing new mixed income attached housing units (Two River Times, 2017). Triumphant Life Church Assembly of God purchased the Main Post Chapel parcel in Oceanport. Triumphant Life renovated the property and is now an active house of worship and community outreach center. The Fort's padlock came down in January 2017 when County Route 537 Extension, known as the Avenue of Memories, connecting Route 35 in Eatontown to Oceanport Avenue in Oceanport was reopened to the public. In April 2017, American Properties Realty entered into an agreement with FMERA to purchase the Howard Commons for $5.9 million. The realty group has agreed to demolish the site's former military housing units and build 251 single-family residential units. A majority, 200, will be market-rate units, with the remaining 51 being affordable housing.

Momentum continued into 2018, with FMERA transferring the 6.5-acre Recreation Center property to the County. The Recreation Center features activities for adults and children such as arts and crafts, basketball, fitness classes, summer camp, and swimming among others. Monmouth County's Fort Monmouth Recreation Center,

operated by the County's Park System, opened its doors in 2014 operating under a lease agreement with FMERA. In March of 2018, Regional Development Group, LLC purchased the 4.2-acre Dance Hall parcel, containing the former recreation building and parking areas. The developers are proposing an adaptive reuse of the 16,420-square-foot building for a microbrewery, coffee house and a multipurpose indoor/outdoor dining and event space. The developer has also committed to the beautification and maintenance of Van Kirk Park, adjacent to the Dance Hall, which will remain open space. Other recent sales include a 13-acre parcel for Oceanport's new Municipal Complex, the former Patterson Army Hospital, sold to AcuteCare; and a three-acre property sold to the County that will provide emergency services to the homeless.

In July 2018, the FMERA Board approved a Purchase and Sale & Redevelopment Agreement with APDP for the sale of the Marina at Oceanport parcel. The Marina at Oceanport opened at the former Fort Monmouth marina in 2015 under an operator's agreement between the FMERA and the restaurant owner, Mario Criscione of Asbury Park Development Partners (APDP).

RWJ Barnabas Health is planning to build a medical campus at the former Fort Monmouth on a 36 acres property. RWJ Barnabas has proposed paying $8 million to buy the property from the New Jersey Economic Development Authority.

Lastly, at its September 2018 meeting, the Fort Monmouth Economic Revitalization Authority (FMERA) approved a Purchase & Sale and Redevelopment Agreement between FMERA and KKF University Enterprises, LLC (KKF). KKF proposes to renovate and construct a state-of-the-art, satellite campus in the heart of Fort Monmouth's Main Post. The property is 28.6 acres, and KKF plans to invest $10 million to renovate a 76,000 square-foot building located on the property.

Also in September 2018, Monmouth County was awarded a $100,000 grant in conjunction with the New Jersey Institute of Technology (NJIT) from the New Jersey Economic Development Authority (EDA) in the pilot round of the Innovation Challenge. The grant is being used to fund a study that will aim to facilitate the growth of an emerging technology cluster at Fort Monmouth. This grant was extremely timely, as FMERA was preparing to release a Request for Offers to Purchase (RFOTP) on the McAfee Center parcel. In keeping with FMERA's mission to create jobs and reinvigorate the regional economy, FMERA staff believes that the highest and best use for the 50-acre McAfee Center parcel is the development of a mixed-use, technology campus.

With two previous unsuccessful Requests for Offers to Purchase (RFOTP) attempts of Parcel F-1, FMERA entered into a Memorandum of Understanding (MOU) with New Jersey Economic Development Authority for predevelopment services. Parcel F-1 includes the Myer Center (673,000 square feet) and former Night Vision Lab (47,000 square feet). The predevelopment services will include environmental remediation and demolition of some buildings on the parcel.

Open RFOTPs include the Allison Hall Complex, 88,129 square feet of five buildings on a 12.6-acre parcel of land; the Lodging Area, a 15-acre parcel slated for residential, institutional, or mixed-use waterfront redevelopment; the Barker Circle Complex, consisting of seven buildings on 19.5 acres; and the Bowling Center. FMERA is seeking proposals to redevelop the largest building of the Allison Hall Complex into a boutique hotel with the remainder to be redeveloped as retail, office/research, and open space.
On May 20, 2020 the tract entered a contract with Somerset Development for $15.3 million to purchase the Lodging Area tract. The developer plans on spending an additional $25 to $30 million to develop the site. This will include 148 townhomes, 118 market rate units, and 30 affordable housing units, and a 50 foot esplanade connecting the Lodging Area to the neighboring Allison Hall Complex (Source: Two River Times).

In 2020, FMERA received two bids to purchase of the former Charles Woods Area. This includes the Forts Pulse Power Building, Pistol Building, and another large building. No contract has been settled at this time, but the

area is slated to be reused for research & development, or light industrial. This parcel was one of the largest underutilized parcels within the Fort (Source: Two River Times)

Part of the proceeds from the sale of property within the Fort's boundaries has been funding necessary infrastructure upgrades. The first phase of a new water supply system on the Main Post in Oceanport has been completed and will serve the North and South Post historic housing, Russel Hall, Triumphant Life Church, Family Promise, Barker Circle, the Fitness Center, and Future Development on Sherrill and Saltzman Avenues. The next phases, which will expand the service to the south and west, are in the design stage. Other infrastructure projects, such as electrical and sewer upgrades, are in various stages of planning and permitting.

Long Branch City Redevelopment: Ocean Boulevard and the West End

Long Branch's 1996 Oceanfront-Broadway Redevelopment Plan comprises the area between Ocean Avenue and Ocean Boulevard from North Bath to Morris Avenue. Pier Village, a Victorian-inspired mixed-use community, was one of the first redevelopment projects, breaking ground in 2005. The first two phases are well established and have been highly successful. Phase III is currently under construction. Phases I and II consist of 536 rental units on top of 100,000 square feet of boutique retail space and restaurants. Three restaurants are situated along the private beach club, Le Club. Le Club was named one of the 20 Great American Beaches in Travel & Leisure Magazine's July 2007 issue. Pier Village as a whole has also received a New Jersey Governor's Tourism Award in 2009 and named the Project of the Year in 2006 by the Urban Land Institute. In 2012, Pier Village was designated a Great Neighborhood by the New Jersey chapter of the American Planning Association. Festival Plaza hosts regular events such as concerts, outdoor movies, and craft fairs. Phase III repaired a missing piece of the boardwalk between Morris Avenue and Melrose Terrace. The repaired boardwalk, partially funded by taxpayer-backed bonds, features a carousel, stage, public restrooms, and children's play area with a mist park. Boardwalk repairs were completed in summer of 2018. The remainder of Phase III, was nearing completion in 2019, of which includes a 72-room boutique hotel, oceanfront condominiums, dining and retail space, parking garage, and public recreational amenities.

Just south of Phase III of Pier Village, Kushner Properties purchased two adjacent properties and has plans on constructing a seven-story, 102-room resort style hotel named the Onada Surf Club. The hotel will include a restaurant, spa, in addition to indoor and outdoor pools available to patrons who stay at the Bungalow and Wave Resorts. They have partnered with Extell Development and are currently in the planning phase with no construction start date. Approvals have been granted by the City of Long Branch

South of Pier Village in the Beachfront South area on Ocean Boulevard, several properties are in various stages of redevelopment. Construction is in progress for FEM Real Estate's South Beach at Long Branch project consisting of 47 luxury condominium units on 1.7 acres. Construction was expected to be completed by late 2019. On the property of the former Cabana Club, construction of Mark Built Homes' seven-story building with 57 luxury condominium residences has begun. Blackridge Realty is also planning to construct a six-story, 40-unit residential building at 345 Ocean Avenue. In 2016, Bluffs Development Urban Renewal was named redeveloper by the City for 290 Ocean Avenue, last used as Jake's Gym, and 286 Ocean Avenue, a former apartment building. The developer plans to demolish the current structures and build Seastar- Classic Living by the Sea, a 33-unit luxury condominium building. The development of Seastar has been stalled as the developer is seeking approval from the City for a PILOT (payment in lieu of taxes) for the project. The land is currently being used as a temporary parking lot.

In early 2018, the City designated Stavola Associates as redeveloper for a portion of the Beachfront North area, and the subdivision is named Long Branch by the Sea. The developer is seeking final site plan approval for the development of 12 single-family building lots, City right of way improvements, grading and stabilization, and landscaping. Construction has not yet begun.

For decades, the Long Branch pier has provided locals and visitors' entertainment, nightlife, fishing, and arcade experiences. After a fire in 1987 and years of neglect, the remnants were torn down and Pier Village replaced them. Due to Long Branch's close proximity to New York City, Long Branch officials continue working towards the establishment of an oceanfront pier and ferry terminal. Trips between Long Branch and Manhattan take around 40 minutes, and proponents of the pier hope that it will continue expanding the City's tourism economy towards a twelve month cycle. They also hope to encourage New York-bound commuters to consider Long Branch as a year-round residential location. The Long Branch Pier and ferry terminal is still in the engineering and design phase. McLaren Engineering Group completed Phase I producing initial engineering and design drawings. In March 2016, the Federal Transit Administration awarded the City $2.4 million to draft a conceptual design for a pier and commuter ferry terminal. The City contracted Thomas Design Group-NJ Planning firm in 2016 to create a design.

Long Branch's West End district surrounding Brighton Avenue includes a mix of small businesses. Damaged by a fire in 2012, city officials adopted a design overlay for the West End District which expands permitted uses to include supermarkets, office or multifamily units above retail (under 20,000 square feet), parking structures, and conditional uses to include mixed-use buildings (over 20,000 square feet), institutional uses, above ground retail, and adaptive reuse of the West End School. In addition, it includes new height requirements, bulk requirements, and parking requirements, as well as design standards. The design standards are intended to give the West End a 'village' feel and to improve walkability. Construction on several new mixed-use residential/retail buildings in the rebounding district is near completion.

The former heart of the City and historic main thoroughfare, Broadway, has endured years of neglect and disrepair. The City of Long Branch adopted the Broadway Redevelopment Plan in October 2002. The goal of this plan to bring about a compact and integrated ensemble of public and private places that support year-round uses related to living, working, recreation, and visitation. Virtually all of the area in the Plan is also within the state-designated Urban Enterprise Zone. Also in 2018, areas of Long Branch were designated as Opportunity Zones, which offer tax benefits to investors. While redevelopment has proceeded slowly, progress was made during 2016 and 2017. Long Branch's Lower Broadway redevelopment zone has been purchased by Long Branch Partners. In 2017, the group demolished all remaining buildings and in 2018, the Long Branch City Council gave approval to a redevelopment plan of the Lower Broadway corridor. The developer is planning on investing $200 million to build 590 rental apartments, 99,500 square feet of retail, and multiple parking garages. In early 2020, Kushner Properties purchased the tract of land from Long Brach Partners and received final approval for plan implementation.

In 2016, Long Branch City was designated a Transit Village by NJDOT. The Transit Village designation compromises Chelsea Avenue to the north, Ocean Boulevard to the east, Bath Avenue to the south and Prospect Street to the west. This designation provides towns with grant opportunities and planning expertise to redevelop land near train or other transit facilities. Long Branch's Transit Village is centered on New Jersey Transit's North Jersey Coast Line Train Station, Monmouth Medical Center, and the waterfront. Their plan calls for mixed-use districts and bicycle routes encouraging pedestrian activity and accessibility to goods, services, and mass transit.

Asbury Park

Asbury Park's resurgence persisted during 2019 with many new residences, restaurants, bars, and retail. In 2018, areas of Asbury were designated as Opportunity Zones, which offer tax benefits to investors.

On the west side of Asbury Park, the redevelopment of Boston Way Apartments, and a 104-unit mixed income rental community is now complete and open for leasing. Just blocks away is the Renaissance, a 64-unit mixed-use affordable housing community, also opened in 2019. In 2018, the final West Side Choice Neighborhood Transformation Plan was submitted to the U.S. Department of Housing and Urban Development (HUD). The goals

of this plan are to replace distressed public housing with high-quality mixed-income housing (especially in the Lincoln Village public housing community), improve quality of life for residents through education and employment opportunities, and to create public and private reinvestment in the community. Other recent and ongoing west side projects include the 2016 opening of Springwood Avenue Park where music concerts are held all summer; the recently approved Parkview AP, a mixed-income residential property intended to provide homeownership/rental income opportunities for low to moderate income buyers, and Rights of Passage, transitional homes for young men and women, both sponsored by Interfaith Neighbors, of which are in various stages of construction. In addition, two new residential buildings on Memorial Drive near the train station will include several lofts reserved for artists.

The City has been focusing efforts on infrastructure and street upgrades on the west side, with the latest completed projects being sewer replacement on Springwood Avenue and intersection improvements at Springwood and Atkins Avenues. The New Jersey Department of Transportation (NJDOT) awarded the City a 2019 Municipal Aid Grant for improvements to Memorial Drive, which will include pavement reconstruction, concrete curbs and sidewalks, drainage infrastructure improvements, and replacement of the deteriorating clay sanitary sewer trunk line from Asbury Avenue to Sixth Avenue. Several other road and sewer improvement projects are in various stages of planning and construction throughout the City.

Asbury Park's lead waterfront redeveloper, iStar, whose projects include the Asbury Hotel, has plans to invest more than $1 billion over the next 10 years. This will include 20 new residential and commercial developments. The former Esperanza site, now named Asbury Ocean Club Surfside Resort and Residences at 1101 Ocean, opened in summer 2019. The 16-story mixed-use tower is comprised of a 56 guestroom hotel, 128 residential units, 21,928 square feet of retail space, and an 11,387 square foot gym/spa. The project is expected to bring in between $2 million and $2.5 million annually in property tax revenue for the City. The iconic Asbury Lanes, purchased by iStar and closed for renovation since fall of 2015, was reopened in spring of 2018. iStar's North End Boardwalk project was completed in 2020 and includes a new boardwalk and parking lot and public restrooms at Fisherman's Cove.

Bringing new retail and office space to the boardwalk, Madison Marquette's 5th Avenue Pavilion was completed in 2018 and the 4th Avenue Pavilion is in the design phase.

Adjacent to the successful Asbury Park Festhalle and Biergarten, historic redeveloper Sackman Enterprises, is constructing 60-unit residential complex. This Lake Avenue project is currently under construction. The same developer, whose Asbury Park properties include the Steinbach Building among others, is also proposing several other development/redevelopment projects on Bangs Avenue, Summerfield Avenue, and Mattison Avenue. Also adjacent to the Asbury Park Festhalle and Biergarten, Asbury Park Distilling opened in summer of 2017. The distillery focuses on gin and whiskey production with a tasting room overlooking the 3,000 square foot production room.

The City has focused much effort on transportation projects over the last several years. Designated a Transit Village by the NJDOT in 2017, Asbury is now eligible for numerous grants that will enable the City to further realize its vision of being an accessible pedestrian and bicycle friendly city. In 2018 a $325,000 grant was awarded to fund wayfinding signage within a half mile radius of the transit center. The City was awarded a NJDOT Technical Assistance Grant for consulting services to produce a bike and pedestrian safety planning study, which was completed in 2018. NJDOT honored the Asbury Park Complete Streets Coalition as the recipients of the 2017 Complete Streets Champion Award for their grassroots efforts to make the City's streets safer for all modes of travel. The Asbury Park Bike Share program was launched in the summer of 2017 with 30 bikes available at locations throughout the City. After the success of the bike share program, the City piloted an electric scooter share program beginning in August 2019. At its peak the plot had 250 scooters and the program is expected to

return in fall of 2020. The City has also installed an electric car charging station located on Mattison, Avenue. In 2019, the City adopted the Walking and Biking Plan as part of the circulation element of its Master Plan.

As part of a road improvement project starting in Allenhurst, Main Street in Asbury Park will be placed on a "road diet." A new striping plan along Main Street in Asbury Park will entail cutting the number of travel lanes to one in each direction with a center turn-lane. Currently, Main Street does not include dedicated left-turn lanes, which leads to congestion, difficulty in making left turns, and a greater risk for crashes. The project, which is underway, will include repaving, curb upgrades for ADA compliance, upgrades of underground utilities and electric utility poles, drainage improvements, lighting improvements, possible sidewalk replacement, sidewalk extensions/bulb-outs at intersections, and dedicated bicycle lanes. The project will be completed in phases along the two-mile stretch of roadway.

The ongoing revival in Asbury Park is also partly event and tourist driven. There are numerous annual events including a St. Patrick's Day Parade, Restaurant Tour, Jersey Pride Parade, Oysterfest, New Jersey Zombie Walk, surf competitions, concerts, SantaCon, and a Downtown Christmas Lighting. In 2018 the annual Garden State Film Festival returned to Asbury Park after spending the last 4 years in Atlantic City. Late in 2018, the Sea.Hear.Now music, arts, and surf festival had its inaugural year and the 2019 festival sold out of tickets. The festival was set to return in 2020, but has been postponed until 2021 due to restrictions on large gatherings as a result of the COVID-19 Pandemic.

In 2017, the City adopted its Master Plan Re-Examination Report and in 2018 its Municipal Public Access Plan was adopted. It also completed a Community Workforce Strategy report. Building on the 2006 Master Plan, of which many objectives remain relevant, the Master Plan Re-Examination Report identified several new objectives in support of its 2027 "Vision of the City", which emphasizes vibrancy and diversity. New objectives were identified in Land Use, Mobility, Economic Development, Historic Preservation, and Sustainability elements. In early 2019, the Sunset Lake Commission released it draft Master Plan for review and comment.

The Heights at Monmouth; Monmouth Mall Redevelopment: Eatontown

The Heights at Monmouth is a redevelopment site plan that encompasses a transformation of the current Monmouth Mall in Eatontown. As it currently stands, the site is just used as a two/ 3 story retail mall with various anchor stores and a parking deck. The outside ring road has numerous standalone buildings, of which mostly consists of restaurants. The vision for the Heights at Monmouth is to redevelop a large section of parking lot into 700 new apartments, along with a new multistory medical building. These new residences will be called Eatontown Circle. The proposal calls for having a section of the malls roof removed and converted to outdoor retail and dining. This concept also applies to one of the anchor stores (where Boscov's is currently located) adjacent to the parking deck. The anchor store is to be demolished and infilled with more of the same outdoor retail and dining. The entire mall is to receive renovations inside and out. This includes the exterior of the structure to receive new retail and dining spaces. The malls main entrance is to be relocated off of County Route 547 (Wyckoff Road) where it will include park space for visitors. These plans and concepts outlined are proposed and have not been finalized to date.

The redevelopment project includes a partnership between Kushner Properties who owns the mall under the name Eatontown Monmouth Mall LLC and developer Rouse Properties. This project is still in the planning phase awaiting further approvals. There is no anticipated start or completion date at this time.

Fort Hancock, Gateway National Recreation Area (Sandy Hook)

Redevelopment efforts are underway at Fort Hancock in Sandy Hook. The National Park Service announced a redevelopment plan for a phased pilot program to restore the 35 historic buildings at Fort Hancock. The intent of the project is to create a viable, vital community and save historic buildings at Fort Hancock by leasing them to organizations and individuals, who will restore them through adaptive reuse. The park accepted Requests for Proposals for six of the buildings in April 2015. The park is planning on leasing two buildings as bed and breakfasts, two as residences or residential offices and two for non-profit educational organizations.

In February 2017, the Park Service issued its first lease and as of June 2018 has Letters of Intent to lease thirteen other buildings at the fort. The leases for the buildings run for 60 years and the Park Service will charge a fair market monthly rate. Any money spent by the lessee in building renovations would offset the monthly rent. The Park Service will also charge a fee for road maintenance, garbage collection, landscaping and other services. The first five lessees will not be charged the fee. Lessees will pay taxes to Middletown. Additionally, in April 2018, the Monmouth County Board of School Estimates authorized $2.9 million to advance the first phases of bidding and constructions of two buildings for additions to the Marine Academy of Science and Technology (MAST).

In 2020, the National Park Service (NPS) received a redevelopment proposal from Stillman Development International to redevelop 21 historic buildings along officer's row for residential use. NPS and Stillman Development International are in the process of developing a Letter of Intent (LOI) to address the terms and due diligence required for the project.

Red Bank Downtown Redevelopment

In 2019, Red Bank Borough announced the formation of a new redevelopment agency comprised off two Borough council members and five residents who will help oversee the rehabilitation and redevelopment projects throughout the town. The organization's mission is to bring to fruition the goals and objectives of the community as established through its elected officials for responsible and sustainable development and redevelopment that elevates the quality of life in and for all neighborhoods of Red Bank and serves to preserve the heritage and culture of the community. The Agency shall be dedicated to providing the organization and attention necessary for the community to develop and stay focused on said goals and objectives.

Opportunity Zones

The following is from the *Monmouth County 2018 Master Plan Reexamination:*

"On April 9, the U.S. Treasury Department released the full list of approved Census tracts, including all 169 submitted by Governor Phil Murphy in New Jersey for identification as Opportunity Zones. While the Federal government established the universe of eligible distressed Census tracts, it was up to each state to narrow the list to 25 percent or less of the eligible tracts. The Opportunity Zone program was created as part of the Federal Tax Cuts and Jobs Act (2017), and will provide Federal community development tax incentives to encourage long-term private investment in eligible Census tracts in "distressed areas." The Program allows investors to temporality defer payment of Federal income tax on realized gains if the gains are invested in a qualified Opportunity Fund within the 180 days of the particular taxable sale or exchange. A qualified Opportunity fund is an investment vehicle that is organized as a partnership or a corporation for the purpose of investing in Opportunity Zone Property. In addition, when a taxpayer disposes of an investment in a qualified Opportunity Zone held by the taxpayer for at least 10 years, the taxpayer can elect to exclude from gross income the capital gain on the investment in the Opportunity Zone Fund."

There are Opportunity Zones located in Freehold Borough, Red Bank, Long Branch, Neptune City, Neptune Township, and Asbury Park. Image 8 depicts the location of the opportunity zones within Monmouth County.

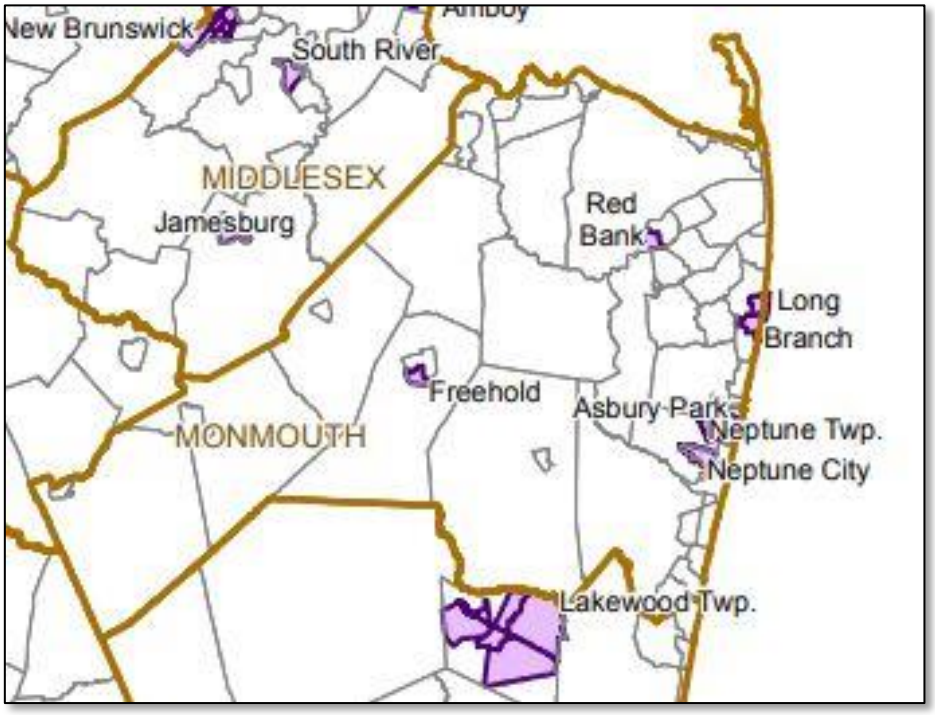


Image 8: Clip of Opportunity Zones Map featuring Monmouth County (Source: New Jersey Department of Community Affairs)

13. County Assets & Programs

Grow Monmouth

A long-term, community-wide initiative, Grow Monmouth serves to promote the economic health of Monmouth County. Outlined objectives include retaining and growing current County businesses, creating jobs and attracting new businesses. Input is gathered from a variety of key sectors including businesses, educational institutions, non-profits, community organizations, and state and local governments.

The Grow Monmouth initiative offers the following resources to assist municipal economic development efforts:

- Economic Opportunity Mapping
- Identification of state and County business incentives
- Economic development and planning technical support

The Made in Monmouth Program, part of the Grow Monmouth initiatives, serves to promote local businesses, showcasing consumer products made in Monmouth County. Open to vendors and the public at no charge, this event began in 2012 with 130 vendors. 2019 brought the 8th annual event and featured over 250 participating vendors, attracting over 5,000 shoppers. This event allows local businesses the opportunity to network with one another and explore the possibility of establishing new business relationships.

Since 2013, the Grow Monmouth program has been using US Department of Housing and Urban Development (HUD) Community Development Block Grant funding to help improve the look of privately-held commercial structures within HUD designated eligibility areas. The Grow Monmouth Façade Improvement Program provides businesses the opportunity to apply for grants of up to $1,850 in order to upgrade exterior façade features such as new awnings, paint, doors, or signs. To date, 80 projects have been completed, reinvesting over $130,000 towards improving commercial facades in income eligible neighborhoods.

Grown in Monmouth, the newest Grow Monmouth program, aims to strengthen the business acumen of our agricultural producers so that they become more successful. Utilizing extensive public outreach and research, the Grown in Monmouth initiative aims to support the local agricultural industry of Monmouth County by identifying emerging business opportunities and critical challenges facing Monmouth County farmers. Evaluation of factors such as land availability and food distribution chains are utilized to develop strategies and recommendations tailored to the unique conditions found in Monmouth County. Grown in Monmouth also features a marketing plan that will strive to foster stronger relationships between Monmouth county farmers, residents, and local buyers, to create an awareness and preference for buying local farm products. The overall goal of Grown in Monmouth is to provide farmers and residents with the information and resources they need to ensure that farming remains an economically sustainable occupation in Monmouth County. In January of 2016, a kickoff meeting occurred that brought together farmers and residents to explain the program and answer questions. Since its establishment, Grown in Monmouth now has numerous participating farms and businesses throughout the County. In 2019, Grown in Monmouth Hosted its first “restaurant week” with over 50 participating restaurants featuring menu items made with locally grown ingredients.

Shared Services

Monmouth County’s Shared Services Program presents opportunities for local government entities to work together to share existing resources and a collective purchasing power. Reducing the cost of services and commodities helps to lower municipalities’ annual budgets, whose savings can then be passed on to local taxpayers.

Additional benefits include:

- Economy of scale purchasing power provides opportunities for lower prices
- Broad ranges of services and commodities available
- Continuity and reliability of service
- Freeing up of local staff and resources
- Less local maintenance
- Improved up-to-date systems and equipment
- Professional and highly trained staff

Monmouth County’s Shared Services program has recorded cost savings of over $20 million. In July 2011, the Board of Chosen Freeholders created the Monmouth County Office of Shared Services allowing for a streamlined process, greater cost savings, and new revenue opportunities. This office acts as a customized and centralized point of contact, processing requests from shared serviced participants and identifying the best service partner. Currently, all fifty-three municipalities share some type of service with the County. Police departments, fire departments, first aid squads, authorities, commissions, public schools, and institutions of higher learning are all sharing services to positively impact budgets and deliver services to residents.

Recent Monmouth County Shared Services Accomplishments

- June 2012: The County opened an automatic truck wash facility open to municipalities with Shared Service Agreements
- June 2012: The County and the Monmouth County Sheriff's Office opened a regional 9-1-1 dispatch hub serving shore towns for police, fire, and first aid dispatching
- April 2014: The County and the Monmouth County Sheriff's Office opened Public Safety Center designed to meet increasing needs for county-wide emergency communications
- November 2016: Expanded GIS Shared Service for Arial Pictometry
- May 2017: Expanded OPRS/RIM Shared Service to County School Districts
- 2019: The Monmouth County Information Technology Services (MCITS) Department now provides technical assistance, training courses and other advisory services to Monmouth departments, agencies, school boards and municipalities

Monmouth County Improvement Authority

Created by the Monmouth County Board of Chosen Freeholders in 1986, the Monmouth County Improvement Authority (MCIA) serves to provide cost-saving alternatives to the traditional methods of public capital financing. This organization assists municipalities, boards of education, local and regional utility authorities, and other local and County government entities in the financing of large projects. Through a pooling of resources and use of the County's AAA bond rating, the Monmouth County Improvement Authority allows local government entities to achieve lower interest on loans. The County guaranty and the pooling of local government bonds and notes into a single, larger financing option make the Monmouth County Improvement Authority bonds attractive to investors. Through the programs offered by this entity, local government entities have been able to construct new schools, purchase public safety equipment, and recover from major storm events. In 2013, on behalf of 16 municipalities, the Monmouth County Improvement Authority sold $47,475,000 in pooled notes, designed to reduce the costs of financing for certain Superstorm Sandy recovery expenses and to ensure continued market access.

The Monmouth County Master Plan

After three years of research, community engagement, and outreach, the Monmouth County Planning Board adopted the first new comprehensive Master Plan in 34 years on October 17, 2016. This is the third countywide Master Plan since the establishment of the Planning Board in 1954. The new plan was created entirely in-house by the professional staff of the County's Division of Planning and builds upon the organization's successful planning legacy. Work on the new plan was initiated in response to a fundamental change in planning from one that had emphasized "growth management" during an era of suburbanization (post WWII) to one that recognizes and responds to slower growth, demographic shifts, limited resources, and 21st century markets demands. The Monmouth County Master Plan is intended to serve as the principle guiding document regarding land use coordination in the county for the next 10 years.

Led by staff from the Division of Planning, work on the Master Plan began earnestly in May 2013. The first order of business was to draft the Master Plan's Vision Statement, develop a detailed and relevant list of Goals, Principles, and Objectives (GPOs), tied to desirable community outcomes, and identify anticipated socioeconomic and demographic trends that could affect both land use and planning initiatives over the next decade. During the summer of 2013, a dedicated Master Plan project website was launched on the county's Planning Board homepage which was designated the "go to" place for community stakeholders to retrieve information and project updates. Public engagement and outreach commenced in October 2013 at a Kick Off/Public Information Event. Attendees included state agencies, County departments, municipal representatives, and community stakeholder groups, and the public.

Over the course of the next year, the Division of Planning Staff hosted over twenty Master Plan Working Group sessions comprised of workshops, exercises, and discussions organized by areas of interest which are now represented by each of the Master Plan's 12-Primary Elements. Throughout development of the Plan's Vision Statement, Goals, Principles, and Objectives (GPOs), as well as the Recommendations and Stakeholder Strategies, Planning staff and members of the Monmouth County Planning Board led numerous discussions with issues-based Working Groups. Attendees were tasked with identifying specific interrelationships between each of the other Master Plan Elements. They also conducted SWOT analysis which identified the Strengths, Weaknesses, Opportunities and Threats confronting these resources during the Plan's lifecycle. Based on dialog and input from these Working Groups, formal Master Plan Recommendations, Stakeholder Strategies, Long Range Challenges, and Emerging Issues were established for each of the Primary Elements.

The dedication, enthusiasm, and successful gathering of information conferred during these Working Group conventions assisted Division of Planning staff in undertaking the enormous task of organizing, writing, and designing the Master Plan for final publication.

In 2018 a Reexamination of the Master Plan was completed. The Reexamination serves as a periodic supplemental report that allows the 2016 Master Plan to be maintained online as a living document. Each Master Plan element received updates to data, programs, and stakeholder actions and efforts.

Monmouth County Community Rating System (CRS) Municipal Assistance Program

The Monmouth County Board of Chosen Freeholders passed Resolution #2014-0201 in March 2014 establishing the Monmouth County Community Rating System Assistance (CRS) program. The County's program, the first in the state, and established specific guidelines municipalities must follow in order to receive professional and technical assistance from the County. This program includes quarterly Monmouth County CRS Users Group meetings facilitated by the Monmouth County Division of Planning and the Monmouth County Office of Emergency Management (OEM). Users Group meetings provide a peer-to-peer learning forum for municipal representatives seeking knowledge about the CRS program. It also allows for the exchange of ideas and strategies that may lend to a community's advancement in CRS. These quarterly meetings also provide an opportunity to ask the County for professional assistance at no cost to the municipality.

The CRS program which is run by FEMA through the National Flood Insurance Program (NFIP) scores communities on their effectiveness in dealing with flood plain management and development. Municipalities that take action steps to increase their resiliency to future storm events are eligible for policy holder discounts. The overall goal of this initiative is to improve the ranking of those towns already in the CRS program, as well as bring more municipalities into the program that might not have the resources to do so alone. Municipalities in the CRS program should see increased investment as actions taken to mitigate flood risk against future storm events combined with lower flood insurance premiums are often viewed positively by potential homebuyers and business investors, particularly in special flood hazard areas (SFHA). The Monmouth County CRS Assistance Program is aimed at municipalities that may not necessarily have the technical, financial, or administrative capacity to successfully participate or advance in the NFIP CRS program.

Since initiating the County program, CRS communities in Monmouth County have increased in number from eight to 16. The municipalities of Keyport, Rumson, and Little Silver, are currently pursuing their initial certification. Additionally, in 2018, Manasquan became the first Monmouth County community to reach a CRS classification of 5, the highest in the County. The CRS Program now saves commercial and residential flood insurance policyholder's over $2.4 million annually. Beyond financial savings from participation in CRS, municipalities in the program have improved public health and safety by implementing flood mitigation projects that improve resilience to future flood events. These measures include public awareness, higher building code

standards, floodplain management, stormwater management, flood protection assistance, and hazard disclosure- all of which play an important part in protecting our municipalities. There is a focused outreach to six additional municipalities to help them join the program. They are Atlantic Highlands, Highlands, Deal, Asbury Park, Neptune City, and Sea Girt.

Since initiating the first regional CRS assistance program in FEMA Region II, the Monmouth County CRS Municipal Assistance Program has received numerous national and state accolades including:

- Awarded the 2014 Walter B. Jones Memorial Awards for Excellence in Coastal Resource Management, an award given to individuals and organizations by NOAA's Office for Coastal Management.
- Mentioned as a case study in the National Association of Counties (NACo) November 2014 Severe Weather Adaption, Coastal Resiliency County Case Studies Volume 2 which explored approaches to reduce vulnerability and exposure through planning, technology, and collaboration tools.
- In 2014, the Division of Planning spoke about its involvement with CRS at a panel discussion with ISO Community Hazard Mitigation, New Jersey Department of Environmental Protection (NJDEP), and New Jersey Association of Floodplain Management at the American Planning Association's New Jersey Chapter (APA-NJ) annual planning conference in New Brunswick, NJ.
- Monmouth County OEM and Division of Planning presented at the 99th New Jersey State League of Municipalities Conference in Atlantic City in October 2014.
- NACo awarded Monmouth County a 2016 Achievement Award for the Monmouth County CRS Assistance Program. Monmouth County received the honor of Best of Category in the "County Resiliency: Infrastructure, Energy and Sustainability" category.
- Monmouth County Division of Planning and Office of Emergency Management staff participated on a Together North Jersey Resilient Task Force CRS workshop to make counties and municipalities in the northern New Jersey more aware of FEMA's Community Rating System and the benefits it can bring to property owners in flood plains.
- Monmouth County employees, Joe Barris, PP/AICP/CFM, Assistant Planning Director and Margaret Murnane Brooks, OEM Deputy Coordinator received the 2017 Floodplain Management Leadership Award presented by the New Jersey Association of Floodplain Management (NJAFM) for their work in CRS.
- 2018 ESRI Special Achievement Award in GIS for the Know Your Zone and High Water Mark Program, both extensions of the CRS program.
- In 2020, Monmouth County applied for and received a $125,000 LEAP (Local Efficiency Achievement Program) Challenge Grant from the New Jersey Department of Consumer Affairs. The money will be used to provide CRS communities with CRS program management software through a three year shared service pilot program.

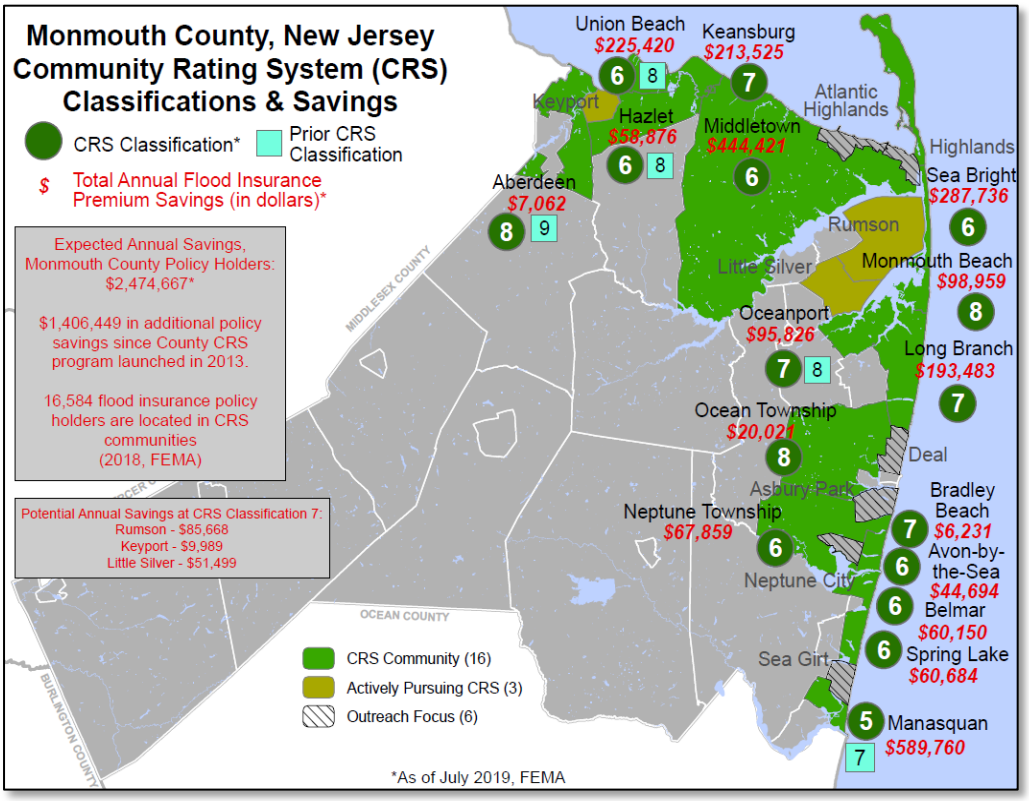


Image 9: Monmouth County Community Rating System Classification Map (Source: Monmouth County Division of Planning)

Monmouth County Office of Community Development

The Office of Community Development, housed in the Division of Planning, coordinates, implements, and monitors compliance for specific federal grant programs: the Community Development Block Grant (CDBG), HOME Investment Partnership Program, and Emergency Solutions Grant (ESG) program. The overall goal of these federally funded community development initiatives is to effectively develop and maintain viable urban communities. As populations change in size, age, and diversity, the effective provision of community services (e.g. housing and economic development) becomes a necessary component towards preserving a community's quality of life. Working with participating communities and various non-profit agencies, this section oversees a variety of activities that benefit low and moderate-income households.

This year, Community Development staff prepared the Monmouth County 5-Year Consolidated Plan providing guidance on funding and investment decisions for policy and community development programs. The Monmouth County CDBG consortium consists of 49 municipalities: Howell, Asbury Park, Long Branch, and Middletown directly receive grant funding from the U.S. Department of Housing and Urban Development (HUD). The Consolidated Plan outlines affordable housing requirements over the subsequent five-year period, and presents a directed course of action the County and participating municipalities can undertake towards achieving established goals and objectives.

Community Development Programs:

Community Development Block Grant (CDBG)

The Community Development Block Grant Program is overseen by the U.S. Department of Housing and Urban Development (HUD). This program has a set of broad objectives, which include the following:

- Benefit Low to Moderate Income households and / or persons (defined as households under 80% of Area Median Income)
- Prevention and / or elimination of slum and blight
- Addressing other community development needs having a particular urgency

In order to qualify for this program 51% of the residents within a specified area must have low to moderate incomes. The percentage and areas selected for eligibility are determined by HUD and are updated on a yearly bass using the U.S. Census American Community Survey (ACS). Applicants have the opportunity to present their proposed projects, or plans in front of the Community Development Block Grant Committee, who then discusses and votes in order to determine the appropriation of funds for each project if selected. Many projects involve improving ADA accessibility in municipality's, road projects, education enhancements, or covering operating expenses.

Home Repair Program

The Monmouth County Home Repair Program (HRP) provides limited financial assistance for repairs, code compliancy, and accessibility modifications to eligible, income qualified Homeowners including the elderly, and disabled. Repairs are limited to those issues that affect the habitability of the home such as lack of running water, electricity, or heating/cooling. These repairs must directly affect the immediate habitability of the home (Source: HRP Homeowner's Instructions and Additional Information Guide).

HOME Investment Partnership Program

The HOME Investment Partnership Program is used to assist those residing in Monmouth County by helping to either cover the cost of housing expenses or to purchase a home of their own. The two programs used are listed below, one specifically for renters, and one for potential homebuyers.

Tennent Based Rental Assistance

The Tennant-Based Rental Assistance program is a platform used to help those for short term rental assistance through the distribution of funds and/ or vouchers to cover the cost of rent or housing expenses.

First Time Homebuyers Program

The Monmouth County Board of Chosen Freeholders offers the Monmouth County First-Time Home Buyers Program (FTHB) to provide financial assistance to low and moderate income eligible County residents interested in purchasing a home in Monmouth County and who have resided in Monmouth County for one year at the time of qualification and purchase. Financial assistance is provided in the form of a deferred payment second mortgage loan not to exceed $10,000 that may be used towards a down payment and/or closing costs. First-Time Home Buyers Program funds are provided through the U.S. Department of Housing and Urban Development (HUD) HOME Investment Partnership Program (Source: 2020 First Time Homebuyer Packet).

Emergency Solutions Grant (ESG)

The Emergency Solutions Grant is a program in which funds are set aside in order to fund specific projects or plans that help those who are in need of immediate housing assistance such as the homeless, at risk youth, and those involved in domestic violence. The funds typically are distributed amongst charities, churches or local groups who help those in need and cover costs such as rapid re-housing, operating costs, education, and outreach.

Current Office of Community Development allocations of funds for FY2020 are outlined below:

- Community Development Block Grant (CDBG) - $2,712,070
    - Home Repair Program - $600,000
- HOME Investment Partnership Program - $1,522,210
    - Tennent-Based Rental Assistance - $175,000
    - First-Time Homebuyers Program - $200,000
- Emergency Solution Grant (ESG) - $218,343



Image 10: Residences in Monmouth Beach (Source: Monmouth County Division of Planning)

14. Current Economy

Monmouth County Annual Economic Surveys

According to the annual Economic Survey, provided by the U.S. Census Bureau, in 2018 Monmouth County brought in just over $4 billion in revenue. Nearly a quarter of that revenue came from the real estate and leasing industry. Following behind are construction, finance and insurance, retail trade, and healthcare and social assistance. Table 14.1 contains a detailed breakdown of the County's economical revenue in 2018.

Table 14.1: Monmouth County's Economic Revenue (2018)

Industry	Number of Establishments	Sales, Value of Shipment, or Revenue
Agriculture, Forestry, Fishing and Hunting	236	$15,433,000
Mining, Quarrying, and Oil & Gas Extraction	5	$2,013,000
Utilities	41	$4,454,000
Construction	4,735	$457,294,000
Manufacturing	493	$34,310,000
Wholesale Trade	1,304	$179,703,000
Retail Trade	4,406	$263,559,000
Transportation and Warehousing	3,802	$157,856,000
Information	901	$56,412,000
Finance and Insurance	2,786	$309,173,000
Real Estate and Rental & Leasing	10,133	$1,008,295,000
Professional, Scientific, and Technical Services	11,311	$726,984,000
Administrative Support Waste & Remediation Management Services	3,830	$148,454,000
Educational Services	2,034	$35,878,000
Healthcare and Social Assistance	4,289	$258,436,000
Arts, Entertainment, and Recreation	3,684	$132,306,000
Accommodation and Food Services	743	$54,190,000
Other Services (Except Public Administration)	3,740	$163,949,000
Total	**58,473**	**$4,008,699,000**

Source: U.S. Census Bureau Annual Economic Report: Compiled by the Monmouth County Division of Planning

New Jersey brought in roughly $44 billion in revenue in 2018. New Jersey's top 5 industries are as follows: Real Estate and Rental & Leasing/ Professional, Scientific, and Technical Services/ Construction/ Transportation and Warehousing/ and Retail Trade. More details can be found below in table 14.2.

Table 14.2: New Jersey's Economic Revenue (2018)

Industry	Number of Establishments	Sales, Value of Shipment, or Revenue
Agriculture, Forestry, Fishing and Hunting	2,102	$131,266,000
Mining, Quarrying, and Oil & Gas Extraction	70	$6,440,000
Utilities	396	$28,111,000
Construction	58,530	$4,711,155,000
Manufacturing	6,841	$458,416,000
Wholesale Trade	14,148	$1,831,819,000
Retail Trade	51,982	$3,019,730,000
Transportation and Warehousing	97,798	$3,974,059,000
Information	10,791	$527,524,000
Finance and Insurance	23,990	$2,419,384,000
Real Estate and Rental & Leasing	106,173	$11,349,095,000
Professional, Scientific, and Technical Services	123,501	$7,207,192,000
Administrative, Support Waste & Remediation Management Services	53,346	$1,563,632,000
Educational Services	26,995	$468,030,000
Healthcare and Social Assistance	57,470	$2,481,878,000
Arts, Entertainment, and Recreation	41,064	$1,254,645,000
Accommodation and Food Services	12,222	$603,496,000
Other Services (Except Public Administration)	58,064	$2,038,213,000
Total	**745,483**	**$44,074,085,000**

Source: U.S. Census Bureau Annual Economic Report: Compiled by the Monmouth County Division of Planning

Comparison

Table 14.3 shows a comparison of the top industrial sectors in Monmouth County compared to the state of New Jersey. The Tourism section includes both "Arts, Entertainment, and Recreation", and "Accommodation and Food Services".

Table 14.3: Economic Revenue Comparison (2018)		
Industry	**Monmouth County**	**New Jersey**
Real Estate and Rental & Leasing	25.2%	25.8%
Professional, Scientific, and Technical Services	18.1%	16.4%
Retail Trade	6.6%	6.9%
Healthcare and Social Assistance	6.4%	5.6%
Tourism	4.7%	4.2%

Source: U.S. Census Bureau Annual Economic Report: Compiled by the Monmouth County Division of Planning
Tourism section includes both "Arts, Entertainment, and Recreation", and "Accommodation and Food Services"

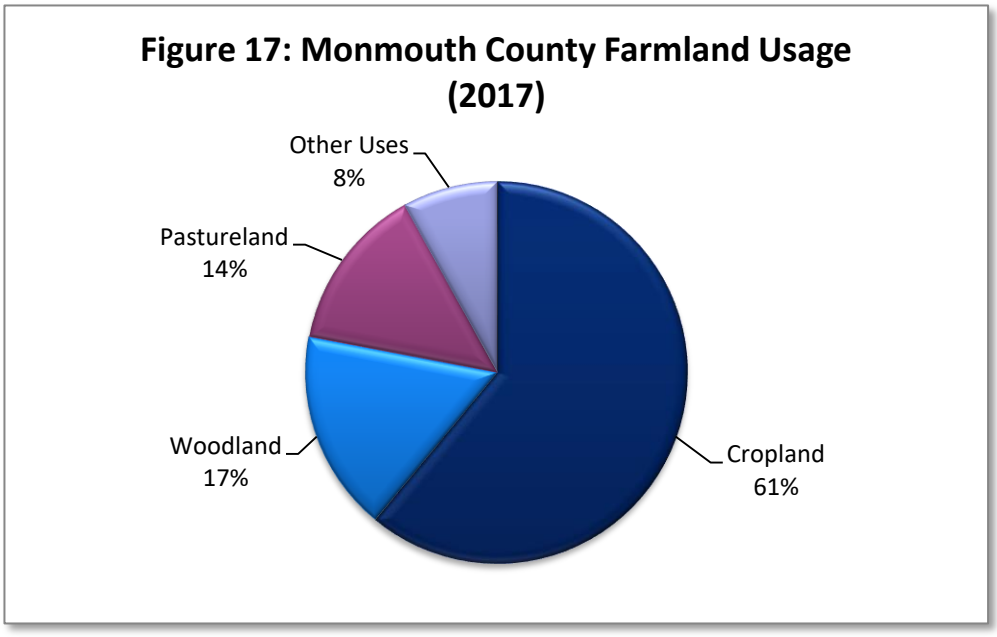
Agriculture

The Census of Agriculture, taken once every 5 years, is a complete count of U.S. farms and ranches and the people who operate them. The U.S. Department of Agriculture conducts the Census every five years, with the next count occurring in 2022. The 2017 Census of Agriculture estimates that Monmouth County has 838 farms whose land area totals to 39,198 acres. Monmouth County ranks 5th in New Jersey for the number of farms and 8th in total farm land. The estimated total asset value of land and buildings per farm for Monmouth County is $981,430; the estimated per acre asset value is $20,982 per acre. Monmouth County has the 7th highest value per farm in New Jersey and 6th highest value per acre. Lastly, Monmouth County ranks 5th in total asset value (total value is calculated by multiplying the estimated value per acre times number of acres), with a total value of $822,452,436.

Over the past 20 years, Monmouth County has seen a decline of 14% and 36% in the total number of farms and acres of farmland operated, respectively. However, between 2012 and 2017 this trend has reversed. The total number of farms has increased by 15 operations or 2%, and the total number of farm acres operated has increased by 237 acres, or 1%. This growth coincides with overall statewide growth. Over the same period New Jersey has seen growth at a faster rate, with number of farms and acres operated increasing by 8% and 3%, respectively.

Although farmland in Monmouth County grew between 2012 and 2017, the total market value of products sold saw a decrease. From 2012 to 2017 sales went from $84,411,000 (not adjusted for inflation) to $80,633,000, a 4% decrease. Conversely, New Jersey saw a 9% increase in the market value of products sold.

In terms of agriculture activity, by far the most prominent in Monmouth County is cropland. As depicted in the chart below, cropland makes up 61% of all farmland in Monmouth County. This is reflected in the total value of agricultural goods produced on crop land. In 2017, nursery, greenhouse, floriculture, and sod alone made up 66% of the total value of goods sold, with crops in general encompassing 83%. Sales related to the equine industry, which is primarily located in Upper Freehold and Colts Neck comprises the highest non-crop related industry. In 2017, the equine industry yielded a total of $8,604,000 in sales, up from $7,172,000 in 2012. Monmouth County's equine industry remains the largest in the State in terms of both sales and land use.



Source: U.S. Census of Agriculture, 2017: Compiled by the Monmouth County Division of Planning

Top sectors relative to other U.S. counties:

- Horses, ponies, mules, burros, and donkeys: Rank: 13, up from 35 in 1997
- Nursery, greenhouse, floriculture, and sod: Rank 52, down from 40 in 1997
- Cultivated Christmas trees, short rotation woody crops, Rank 164

Top sectors in total value for Monmouth County:

- Nursery, greenhouse, floriculture, and sod: value of $53,267,000
- Horses, ponies, mules, burros, and donkeys: value of $8,604,000
- Vegetables, melons, potatoes, and sweet potatoes: value of $5,475,000
- Grains, oilseeds, dry beans, and dry peas: value of $3,813,000
- Other animals and animal products: value of $1,319,000

A majority of farm operations in Monmouth County are small farms with total value of sales less than $4,999, and of those, 79% make less than $1,000.

Farmland Preservation

Starting in the 1980s Monmouth County has made a substantial investment in securing an agricultural land base for current and future generations of farmers. As of July, 2020 throughout the County there are 40,728.74 acres of tax assessed farmland. Of this farmland, 15,515 acres are a part of the Monmouth County Farmland Preservation Program. This equates to 38% of the tax assessed farmland within the County, to be protected under this program. The Farmland Preservation program assists in the protection and conservation of farmland within the county jurisdiction from future development. This protects an integral; and historical aspect of Monmouth County. A key aspect of the program is that it assists municipalities draft grant applications for funding to purchase these lands in the form of agricultural easements or land sales.

Examples of how these property easements or sales are acquired are listed as follows:

- Direct Easement Purchase Programs
- Fee Simple Programs
- Nonprofit Programs
- Interagency Transfer
- Municipal Pre-Acquisition
- County of Monmouth Easement
- Installment Purchase Agreements
- Donations and Bargain Sales
- Like-kind Exchange
- Eight Year Programs
    - Non-Municipally Approved
    - Municipally Approved

Table 14.4 lists the top 10 municipalities with the highest number of acres designated for farming. In addition it also lists the percentage of farmland within that municipality. The majority of farmland remains in the panhandle (south western) region of the County, with some larger pockets located near the center of the County as well.

Table 14.4: Top 10 Farmland Municipalities

Municipality	Acres	Percentage
Upper Freehold	16,427.6	57.2%
Millstone	7,252.8	32.3%
Howell	5,560.9	15.6%
Colts Neck	5,229.5	27.8%
Manalapan	3,846.3	21.1%
Freehold Township	2,940.2	12.8%
Wall	2,392.4	14.0%
Marlboro	2,231.5	12.7%
Middletown	1,903.4	8.8%
Holmdel	1,138.6	10.8%
Tinton Falls	397.6	4.8%

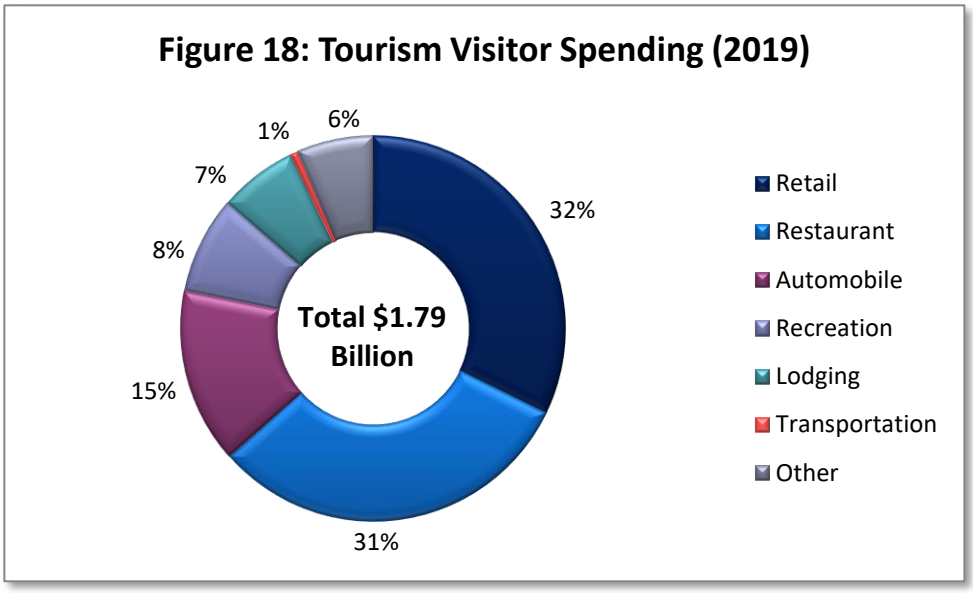
Compiled by the Monmouth County Division of Planning



Image 11: Fair Winds Farm, Upper Freehold Township (Source: *Upper Freehold Historic Farmland Byway Corridor Management Plan*, Monmouth County Division of Planning, New Jersey Department of Transportation)

Tourism Visitor Spending

According to the Monmouth County Division of Economic Development, Monmouth County generated $1.7 billion in tourism sales in 2019. Figure 18 and table 14.5 represent the breakdown of tourism dollars spent. $577 million were spent on retail alone. This accounts for 32.23% of all tourism spending. Followed by restaurants, which make up 31.2% or $559 million.



Source: Monmouth County Division of Economic Development: Compiled by the Monmouth County Division of Planning

Table 14.5: Tourism Visitor Spending (2019)		
Category	**Amount Spent (Millions)**	**Percentage of Total**
Retail	$577	32.2%
Restaurant	$559	31.2%
Automobile	$263	14.7%
Recreation	$146	8.2%
Lodging	$118	6.6%
Transportation	$12	0.7%
Other	$115	6.4%
Total visitor spending	**$1.79 (Billions)**	

Source: Monmouth County Division of Economic Development: Compiled by the Monmouth County Division of Planning

Annually, over six million visitors enjoy Monmouth County park facilities. The Manasquan Reservoir site serves as the Park System's most popular site with more than one million visitors a year. Monmouth County is also home to several notable national and state parks including Allaire State Park, Gateway National Recreation Area, Monmouth Battlefield State Park, and Telegraph Hill State Park, which includes the PNC Bank Art Center. These parks also include state-owned wildlife refuges and federally-owned habitats for endangered species.

Ferry services connecting New York City to Monmouth County coastal communities, transport visitors to Sandy Hook and other nearby tourist destinations. On weekends, buses provided by Seastreak, connect visitors from the pier directly to the Sandy Hook beaches. SeaStreak ferry service also has special summer schedules for tourists to utilize to access Monmouth County beach destinations.

The Monmouth County Department of Public Information and Tourism maintain a website and guidebook that provides a comprehensive list of tourism offerings. The website lists places to stay, things to do, outdoor activities, and history and heritage activities. An event calendar is regularly updated and is available to add events upon request.

Other Industries

Health Services

Data from the Quarterly Census of Employment and Wages shows that employment within the healthcare and social assistance field accounts for approximately 21.2% of all private sector jobs within Monmouth County. In 2019, these industries accounted for 49,618 private sector jobs which broke down as follows:

- 22,644 (9.6%) jobs in Ambulatory Health Care Services
- 11,271 (4.8%) jobs in Hospitals
- 9,314 (3.9%) jobs in Nursing and Residential Care Facilities
- 6,389 (2.7%) jobs in Social Assistance

*Percentage of total jobs within the County

The Meridian Healthcare system recently joined together the medical services of Jersey Shore University Medical Center, K. Hovnanian Children's Hospital, Riverview Medical Center, and Bayshore Community Hospital. Additional hospitals not associated with the Meridian Healthcare system include Monmouth Medical Center, and CentraState Medical Center.

In March 2015, Meridian Health announced a partnership with Rutgers Cancer Institute of New Jersey to expand personalized treatment offerings to patients. This clinical trial, which uses a genomic analysis to identify abnormal changes in the genetic makeup of the cancer, is part of the precision medicine initiative, which aims to tailor or individualize cancer treatment for patients. This technology enables specialists to move beyond the 'one size fits all' approach when it comes to treatment options for patients. This partnership will allow patients within the Meridian system access to clinical trial offerings only available at National Cancer Institute designated cancer centers and their network hospitals.

Also in March 2015, Jersey Shore University Medical Center opened a Neuro-Intensive Care Unit, a dedicated post-operative intensive unit treating patients with life-threatening neurological and neurosurgical illnesses. The first of its kind within the Monmouth-Ocean region, this new unit provides specialized, comprehensive care, and access to the region's only designated comprehensive Stroke Rescue Center.

The first phase of rehabilitation within the former Paterson Health Clinic on the Fort Monmouth Property opened in October of 2015. The AcuteCare Health systems clinic (affiliated with Monmouth Medical Center) will provide care for seniors, veterans, and other patients. This new facility will net 200 new jobs for the area.

In September 2016, the final beam was placed on the Jersey Shore University Medical Center's $265 million, 10-story building called Hope Tower. Opened in 2018, Hope Tower houses its cancer center, imaging technologies and academic programs. The building also includes: the Meridian Cancer Care center; outpatient imaging services; clinical academic center; innovative simulation laboratory; and a nine-level parking garage building with more than 1,500 new parking spaces for patients, guests and team members.

In fall 2016, Memorial Sloan Kettering opened a 285,000 square foot facility in Middletown, offering comprehensive ambulatory oncology services. This new outpatient facility offers comprehensive ambulatory oncology services delivered by Memorial Sloan Kettering clinicians. The facility also serves as Memorial Sloan Kettering's data center.

Creative Industries

The Creative Industries are defined as arts businesses that range from nonprofit museums, symphonies, and theaters to for-profit film, architecture, and design companies. Arts businesses and the creative people they employ stimulate innovation, strengthen America's competitiveness in the global marketplace, and play an important role in building and sustaining economic vibrancy. A new research study published by Monmouth County uses statistical data to quantify the scope and economic importance of the arts in Monmouth County. Currently, the County's creative industries range from major performing arts centers and small community based arts groups, to artist entrepreneurs and creative businesses. This industry represents an important and growing sector of the economy. The creative industries in Monmouth County are viewed as a significant driver of the local economy and critical to creating communities where people want to live, work, and invest.

The 2015 Monmouth County report on creative industries titled "Measuring Monmouth County's Creative Economy" found the following:

- Creative Industries in Monmouth County include 1,488 nonprofit and for-profit businesses that employ 7,441 employees and have a total sales volume of $1,918,024,000
- There are 2,664 self-employed individuals working in a creative industry, whose sales volumes totals $81,455,000
- Monmouth County has 95 nonprofit arts and cultural organizations that collectively raise $37,893,806 in revenue
- Nonprofit arts and cultural organizations along the were estimated to support 1,096 full time jobs, and generate $1,337,756 in local government revenue and $1,770,841 in state government revenue

Military

Naval Weapons Station Earle, located in Colts Neck, Howell, Middletown and Tinton Falls, provides approximately 400 civilian jobs in the clerical, administrative, industrial, law enforcement, and professional fields. Approximately 250 base personnel and dependents reside in base housing. Additionally, approximately 300 navy reservists are on-site once a month. Earle is the operational support base for five Military Sealift Command combat logistics ships. Earle's main base encompasses 10,160 acres, 15 miles west of the Atlantic coastline. Twelve miles north of the main base is the waterfront pier complex stretching into Raritan Bay. Extending 2.5 miles from shore, the complex is comprised of a two mile trestle which connects to three separate piers. Ranked as one of the longest 'finger piers in the world, the Navy Munitions Command at the Waterfront complex provides ammunition for nearly every class of ship operated by the Navy and United States Coast Guard. The Division of Planning works closely with NWS Earle on projects that aim to benefit both the installation and the local community.

In September 2016, the Department of Defense (DOD) awarded Monmouth County a $206,000 grant to prepare a Joint Land Use Study (JLUS). The JLUS is a cooperative land use planning effort between affected local government entities and a military installation. The project was completed in December 2017. The goals of the project are to:

- Encourage local governments to work closely with Naval Weapons Station Earle to seek development options that are compatible with continued utility of the base, and that preserve public health, safety, and welfare of those living near the installation.
- Improve post-storm resiliency for the military installation and surrounding communities through increased adaptation to adverse impacts from sea level rise, both on base and in the neighboring communities.
- Ensure preservation, protection, and post-storm resiliency of the Strategic Highway Network (STAHNET) including the Normandy Road/Rail Corridor and the major roadways that serve NWS Earle and the surrounding communities.

These goals will be achieved by:

- Investigating ways to promote community development that is compatible with the mission of Naval Weapons Station Earle.
- Investigating ways to reduce operational impacts on adjacent lands, including the unsecure nature of the Normandy Road Rail Corridor and increased use of the Raritan/Sandy Hook Bays by non-Navy vessels.
- Investigating adaptation options for community-wide reduction of potential climate change impacts, increased storm resiliency, and prevent isolation of NWS Earle during storm events.

The study made 37 recommendations that can be grouped into the following 7 categories:

- Communication/Outreach: Efforts needed to improve communication and coordination between the base and surrounding municipalities.
- Land Use: Potential changes to land use planning, affordable housing, farmland preservation and other land-based compatibility measures within the MIA surrounding the base.
- Economic Development: Mutually beneficial economic development initiatives in the areas surrounding NWS Earle.
- Transportation: Proposed improvements to transportation facilities on land, water (Raritan/ Sandy Hook Bay), and air surrounding the base.
- Utilities: Joint and mutually beneficial utility systems projects.
- Climate Resilience: Joint efforts to reduce risk from sea level rise, storm events, and localized flooding.
- Security: Proposals to improve security around the military facilities and assets at NWS Earle.

The County spearheaded the project and sought input on the project from Freeholders, the County Administrator, NWS Earle Commanding Officer, Monmouth County Planning Director, Monmouth County Director of Public Works and Engineering, and the Mayors of the five Earle municipalities: Colts Neck, Howell, Middletown, Tinton Falls, and Wall.

Phase 2 of this Study was completed in 2019.

In January 2018, Monmouth County authorized the submission of a pre-proposal to the Readiness and Environmental Protection Integration Program (REPI) sponsored by the United States Department of Defense (USDOD). The program encourages partnerships between military departments and local governments for the purpose of preserving unique, environmentally-sensitive lands and carrying out natural resource management projects near military bases. The USDOD will provide additional funding up to 50% of the acquisition costs of an eligible property following the execution and recording of a restrictive easement to preserve the land and/or up to 50% of the cost of natural resources management activities, essentially doubling local funding. The county intends to seek $5,000,000 from the DOD as part of the REPI proposal, and the County's $5,000,000 match would derive from the Open Space and Farmland Preservation Trust Fund and other participating funding partners.

15. Economic Outlook

*Disclaimer: These outlooks were established before the 2020 COVID-19 Pandemic began. There is no updated/ proven economic outlook data that can conclude the future growth due to this event at this time.

According to Cushman & Wakefield, based on 2019 4th Quarter reports, overall the economy is bouncing back and remaining steady for the time being. Office space remains occupied, industrial space is being occupied more rapidly and not remaining vacant, and retail development/ leasing is holding steady as consumer spending is increasing. The following tables (15.1, 15.2, and 15.3) represent the economic outlooks of Monmouth County. Office and Industrial outlooks specifically target Monmouth County and include year to date counts, while the Retail outlook includes Monmouth County within the "New York City Metro (Greater Tri-State)" geographical area and includes a single quarter count. Other regions represented were selected to show a variation of locations throughout the United States.

Office

In the Central New Jersey region, Monmouth County ranks 3rd out of six for highest office space. Monmouth County is also tied for 1st place in quarter 4 for the lowest vacancy rates of its office space with

approximately 1.2 million square feet currently not occupied. Table 15.1 goes into detail about the occupancy, vacancy, and rent rates, compared to the other five counties within this region.

Table 15.1: Office Space (Q4 2019)

Region	Inventory	Net Absorption	Construction	Vacancy Rates	Vacant Sqf.	Avg. Asking Rent
Hunterdon County	2,945,435	17,123	0	15.5%	456,703	$19.22
Mercer County	16,866,650	-23,152	0	15.7%	2,644,650	$29.12
Middlesex County	23,661,820	237,808	0	15.4%	3,876,056	$27.49
Monmouth County	11,608,034	-138,912	0	10.6%	1,229,174	$24.13
Somerset County	19,562,369	38,424	0	22.5%	4,410,091	$24.64
Union County	8,495,546	114,961	0	10.6%	902,028	$27.33
	Sqf. - Square Feet					$ Per Square Foot

Source: Cushman & Wakefield Marketbeat Central New Jersey Office Q4 2019: Compiled by the Monmouth County Division of Planning

Retail

Consumer spending is up both in brick and mortar stores and in the eCommerce industries according to Cushman & Wakefield's Marketwatch outlooks for the U.S. Monmouth County is includes within the New York Metro (Tri-State) region. The areas compared were selected to give a variation of locations across the nation, of which are relatively similar in regards to population size and include metropolitan areas of varying sizes and densities. This was done in order to keep comparisons relatively equal based on their categorization.

The New York Metro (Tri-State) region does have the largest amount of retail square footage compared to the entire nation. Dallas comes in second followed by Chicago. The New York Metro (Tri-State) region has the lowest vacancy rate out of the top 3 regions with the highest square footage, but not the lowest in the nation. Miami has the lowest vacancy rate in the nation with 3.7% of its retail inventory vacant. While Chicago and Oklahoma City both tie for the highest vacancy rate of 9.1%.

Table 15.2: Retail / Shopping Center Space (Q4 2019)

Region	Inventory	Net Absorption	Construction	Vacancy Rates	Vacant Sqf. (Est.)	Avg. Asking Rent
Atlanta	137,687,464	53,320	545,568	6.7%	9,225,060	$13.92
Chicago	186,658,817	530,135	303,947	9.1%	15,347,952	$14.88
Dallas	195,772,422	192,539	684,673	7.3%	14,291,387	$15.62
Los Angeles	185,642,751	-174,304	1,405,799	5.7%	10,581,637	$27.80
New York Metro (Greater Tri-State)	276,464,956	280,990	1,383,671	6.6%	18,246,687	$20.86
Raleigh / Durham	46,434,911	78,159	124,800	3.6%	1,671,657	$16.79
	Sqf. - Square Feet					$ Per Square Foot

Source: Cushman & Wakefield Marketbeat U.S. National Shopping Center Q4 2019: Compiled by the Monmouth County Division of Planning
*Shaded yellow includes Monmouth County

Industrial

In regards to industrial space Monmouth County does rank last in the Northern and Central New Jersey regions for overall industrial square footage. The neighboring county of Middlesex has the highest amount of industrial square footage of more than 215 million. They also have the lowest vacancy rate of just 1.3%, compared to Monmouth of 5.3%. Past development has shown an increase in warehousing demand along the New Jersey Turnpike corridor. At the moment, Monmouth County does not have any industrial construction underway as of quarter 4. This may perhaps mean Monmouth County can conceivably become the next hotspot for industrial warehousing development as infill development becomes problematic in other counties along the New Jersey Turnpike corridor. Target areas would be municipalities that have access to Interstate 195, or State Route 33. Both routes have large interchanges with direct access to the turnpike.

Table 15.3: Industrial Space (Q4 2019)

Region	Inventory	Net Absorption	Construction	Vacancy Rates	Vacant Sqf. (Est.)	Avg. Asking Rent
Mercer County	31,955,450	938,112	786,720	4.7%	1,501,906	$14.96
Middlesex County	215,487,775	4,784,115	5,253,010	1.3%	2,801,341	$18.87
Monmouth County	13,555,368	-46,508	0	5.3%	718,435	$15.75
Somerset County	34,897,617	226,076	2,418,710	1.8%	628,157	$26.97
Union County	57,489,436	1,366,658	154,802	2.1%	1,207,278	$28.81
	Sqf. - Square Feet					$ Per Square Foot

Source: Cushman & Wakefield Marketbeat New Jersey Industrial Q4 2019: Compiled by the Monmouth County Division of Planning

16. COVID-19 Pandemic

In the first quarter of 2020, the COVID-19 pandemic swept across the globe and infiltrated Monmouth County and the rest of the state of New Jersey. Being one of the hardest hit states, the pandemic caused massive shutdowns, lockdowns, and crippled the local economy. Today businesses are struggling to reopen or stay open if they have the means to do so. Curbside pickup, free local deliveries, or creative outdoor dining and retail options are a few ways business are adapting in an attempt to stay financially afloat while maintaining social distancing standards issued by the federal and local government mandates. With a majority of the tourism industry currently shut down or operating at a limited capacity, this is putting a strain on businesses in Monmouth County.

CARES Act

Monmouth County received nearly $108 million in federal stimulus money as part of the CARES Act to be used to offset unexpected expenditures related to COVID-19 from March 1, 2020 through December 30, 2021.

Monmouth County Municipal Coronavirus Relief Fund Program

While CARES money was given directly to the County to offset costs, the County created a Municipal Coronavirus Relief Fund program so towns could be reimbursed for eligible expenses incurred during their response to COVID-19.

Monmouth County CARES, Economic Assistance Grant Program

The Monmouth County Board of Chosen Freeholders dedicated $10 million of its allocated CARES funding to support our community's small businesses and nonprofit organizations as they struggle to provide residents and visitors with their essential and exceptional goods and services. The Monmouth County CARES Economic Assistance Grant Program provides financial support up to $10,000 for those qualifying businesses, business owners, and nonprofits that do not exceed $5 million in annual gross revenue and have experienced costly interruptions as a result of the Coronavirus pandemic.

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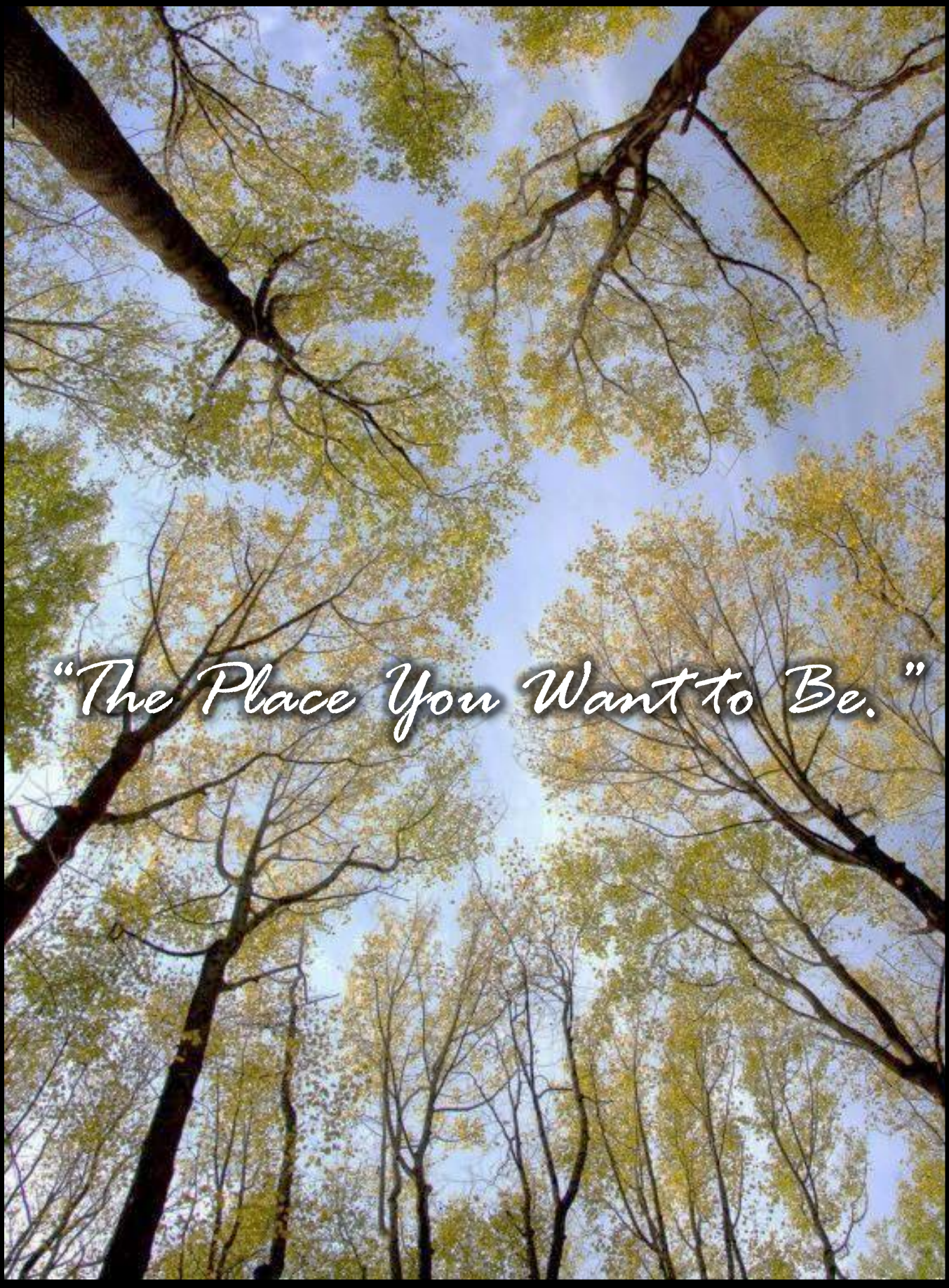
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