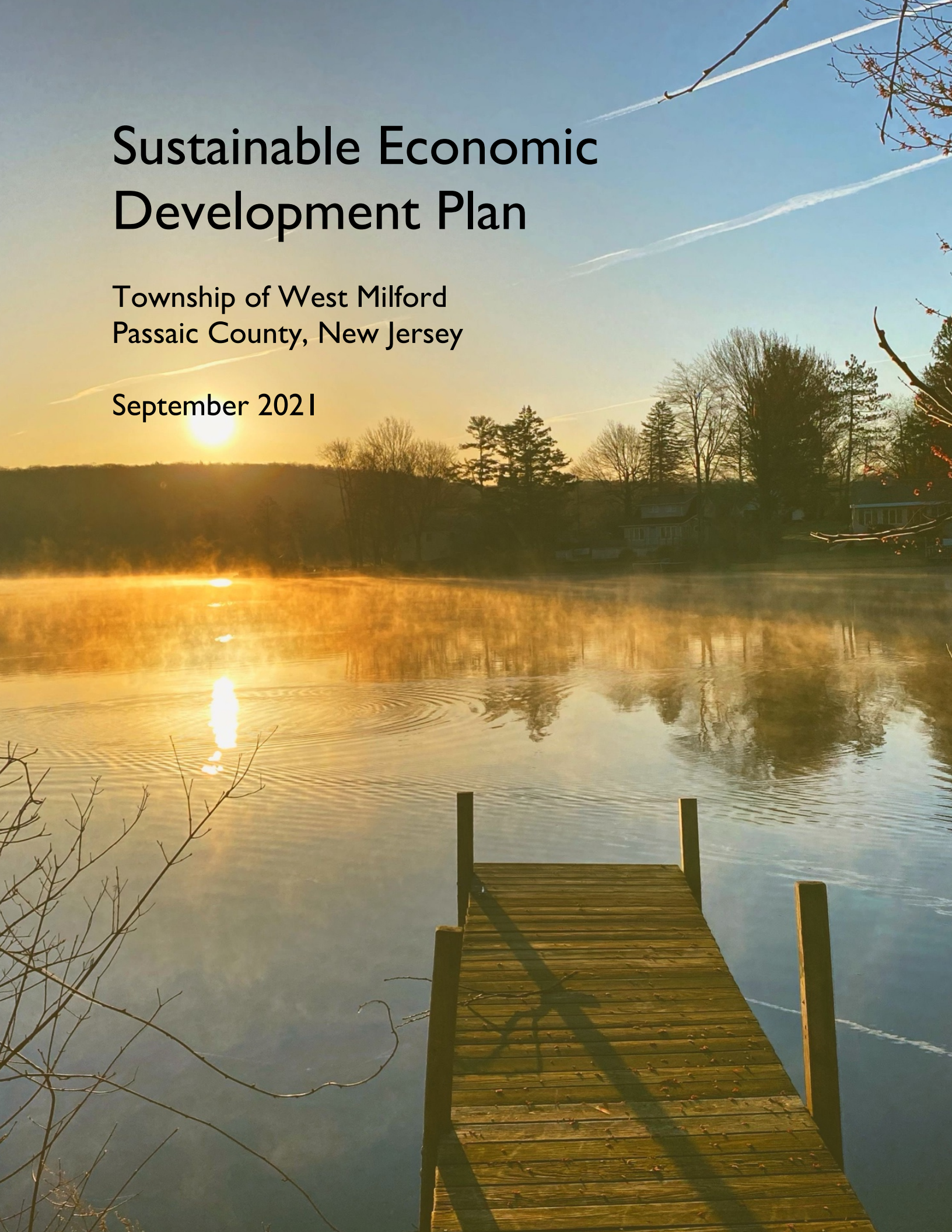


Sustainable Economic Development Plan

Township of West Milford
Passaic County, New Jersey

September 2021



ACKNOWLEDGEMENTS

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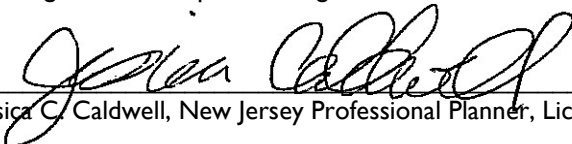
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The original of this report was signed and sealed in accordance with N.J.S.A. 45:14A-12



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Introduction

Overview

The Township of West Milford covers 81 square miles and is located in the northern section of Passaic County along its border with New York State and Sussex and Morris Counties. West Milford is surrounded by Orange County, New York to the north; Vernon Township and Hardyston Township in Sussex County to the west; Jefferson Township, Rockaway Township, and the Borough of Kinnelon in Morris County to the south; and Ringwood Borough and the Township of Bloomingdale in Passaic County, to the east. West Milford is entirely within the Highlands Preservation Area and notably, on the fringe of the New York Metropolitan Area. In February 2011, the Highlands Council approved West Milford's petition for Plan Conformance, the process for aligning the municipality's land use plans and ordinances with the Highlands Regional Master Plan¹. As a part of Plan Conformance, the Township of West Milford has prepared and adopted various Highlands Plan Conformance documents, including an updated Environmental Resources Inventory, a Highlands Master Plan Element of the Township Master Plan and implementing ordinances. In addition to goals focused on protecting the Township's water resources and other natural resources, the Township Master Plan recognizes the need for a strong local economy. The Master Plan promotes smart growth and sustainable economic development, seeking to optimize existing development, enhance the business community, and grow in ways that are consistent with and take advantage of the unique environment in which the Township is located. The Sustainable Economic Development Plan seeks to further promote implementation of these Master Plan goals. The Plan was funded by a grant from the Highlands Council. Once approved by the Planning Board, the Plan will serve as an element of the Township's Master Plan.

Purpose of the Sustainable Economic Development Plan

A sustainable economy is vital to the well-being of the Township of West Milford, Passaic County, and the region. The purpose of the Sustainable Economic Development Plan is to set forth strategies for strengthening the local economy and in turn, contribute to the regional economy while taking careful advantage of the unique and valuable built and natural resources of the Township.

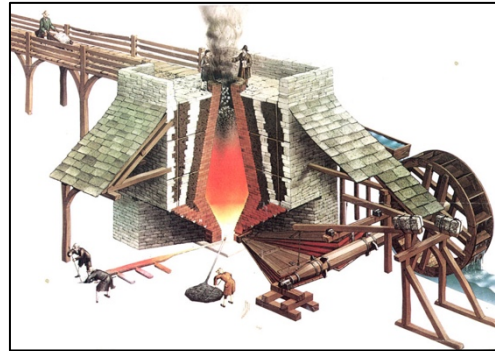
This Plan focuses on the Township's existing mixed-use commercial areas, which consist of historic communities and mixes of residential, commercial, and recreational uses. The two primary areas of focus are the West Milford Shopping Center and surrounding area ("Town Center"), and downtown Hewitt ("Hewitt Village Center"). In addition to these centers, a portion of Route 23 as well as stand-alone properties such as Jungle Habitat and Brown's Point are discussed. Commercial areas in the Township struggle to fill vacant storefronts, but are opportunities for small-scale rehabilitation and infill redevelopment due to their strong anchor buildings and potential to serve as destinations for both local residents and visiting tourists.

¹ NJ Highlands Council. *Plan conformance: West Milford Township*. https://www.nj.gov/njhighlands/planconformance/west_milford_twp.html

History of West Milford's Industry and Commerce

The first major industry in West Milford revolved around the extraction and processing of iron ore. The Long Pond Ironworks furnace was founded in 1764 in the Township. Long Pond Ironworks was the largest iron ore processing facility in the area and operated up to the 1950's. Geographically, West Milford was ideal for the extraction, processing, and transport of iron. Much of the iron ore was already exposed and required little intensive mining to extract it. Three local streams and Greenwood Lake provided the necessary waterpower for processing and shipping. At its peak, Long Pond Ironworks processed about 25 tons of iron per week and provided skilled jobs for 500 West Milford residents. Three other iron ore furnaces were constructed in West Milford in the 1800s. The most successful was near Clinton Falls, which ran for close to 17 years.

Figure 1. Cold-blast furnace²



Post-1882, when steel and coal became the cheaper and easier alternatives, iron production ended at Long Pond Ironworks but mining continued as a major industry in West Milford and northern New Jersey. In the 19th Century, two other mines were in operation in the Township: Roomy Mine and Blue Mine. Other industries grew out of the mining industry including production of charcoal from local hardwoods and the production of lime and lime kilns.

Housing for residents developed alongside the mining industries. Hewitt, the village that directly surrounds the Ironworks, continued to grow and adapt to the times, eventually becoming a town with a church and school. Along with residences, a grist mill was constructed in the 1700s. Other industries that sprang up included shingle cutting, ice cutting, barrel hoops, and the tanning of hides. A knife factory was also located within the Township along the Pequannock River. West Milford had a variety of thriving industries.

In the 1800s, development grew around transportation corridors. The Peterson and Decker Stagecoach line ran through the Township in the 1850s. By the late 1800s, rail lines were constructed into the Township, including the Macopin Line, which was completed in 1887. Boarding houses and hotels sprung up around the rail line. Also in the late 1800s, and early in the early 1900s, West Milford's tourism industry was peaking with as many as 40 hotels including the Idylease Inn³.

In 1892, the City of Newark contracted with the East Jersey Water Company for a water project to bring 50 million gallons of water a day to Newark. Over time, the Newark Watershed Conservation and Development Corporation purchased 35,000 acres of land including five (5) reservoirs with a total storage capacity of 14.4 billion gallons of water.

² Mary Jasch, "Long Pond Ironworks: The Hills of Ramapo." Skylands Visitor. <https://njskylands.com/hslongpond>

³ Richard Zampella, "Idylease: It's Role in Tourism at the Turn of the Century in West Milford, NJ. A Multi-Media Presentation at the West Milford Township Public Library on March 12, 2020 at 7PM. <http://idylease.org/idylease-blog/tag/west-milford-history/>.

In the 1900s, resort tourism to West Milford began to slow down. With the introduction of cars and roads in the 1920s and 30s, summer communities began developing around the lakes in the area. The summer communities increased the population from 2,000 in the winter to around 25,000 in the summer. After World War I, the summer communities began shifting to year-round residential communities which continued through the 1960s.

In 1957, a fire on the Long Pond Ironworks property left twelve buildings and 70 ruins remaining. The 175-acre area was subsequently designated a State Park. With 80 square miles of well-preserved natural resources and a low population density, in addition to being within the New York Metropolitan Area, West Milford continues to draw tourists and year-round residents because of its natural beauty, numerous lakes, and access to open space and parks.

More recently, West Milford has seen substantial increases in short-term vacation rentals. In 2017, the Township had about 90 active hosts through Airbnb and saw a total of about 8,100 guests over the year. In 2019, the number of hosts increased to about 218 and continues to grow. In December 2019, an ordinance was passed that regulated these short-term rentals.

As the Township of West Milford, along with the rest of New Jersey and the world, emerges from the COVID-19 health emergency in 2021, demographics and demand for housing is again shifting. High demand for housing outside of urban areas has created a spike in home sales in West Milford. This has been a positive by creating demand for housing where pre-COVID vacant housing rates were above 20 percent. In the new post-COVID economy there are opportunities for places like West Milford where more people are working from home and allowing them to live further away from urban centers. Likewise, many people who live in urban areas are seeking weekend and summer vacation homes. This has spurred more visitors to West Milford and more purchases of second homes in the area. In addition, the Township has seen a huge spike in weekend visitors to its parks and open spaces. The increase in tourism and daytime population in West Milford have the ability to spur more economic development in the Township. Notably, at the time of this report, West Milford is set to opt in to the New Jersey Cannabis Regulatory, Enforcement Assistance, and Marketplace Modernization Act, which legalizes the recreational use of marijuana by adults 21 years of age or older. This plan identifies these and other opportunities to improve economic development in the Township.

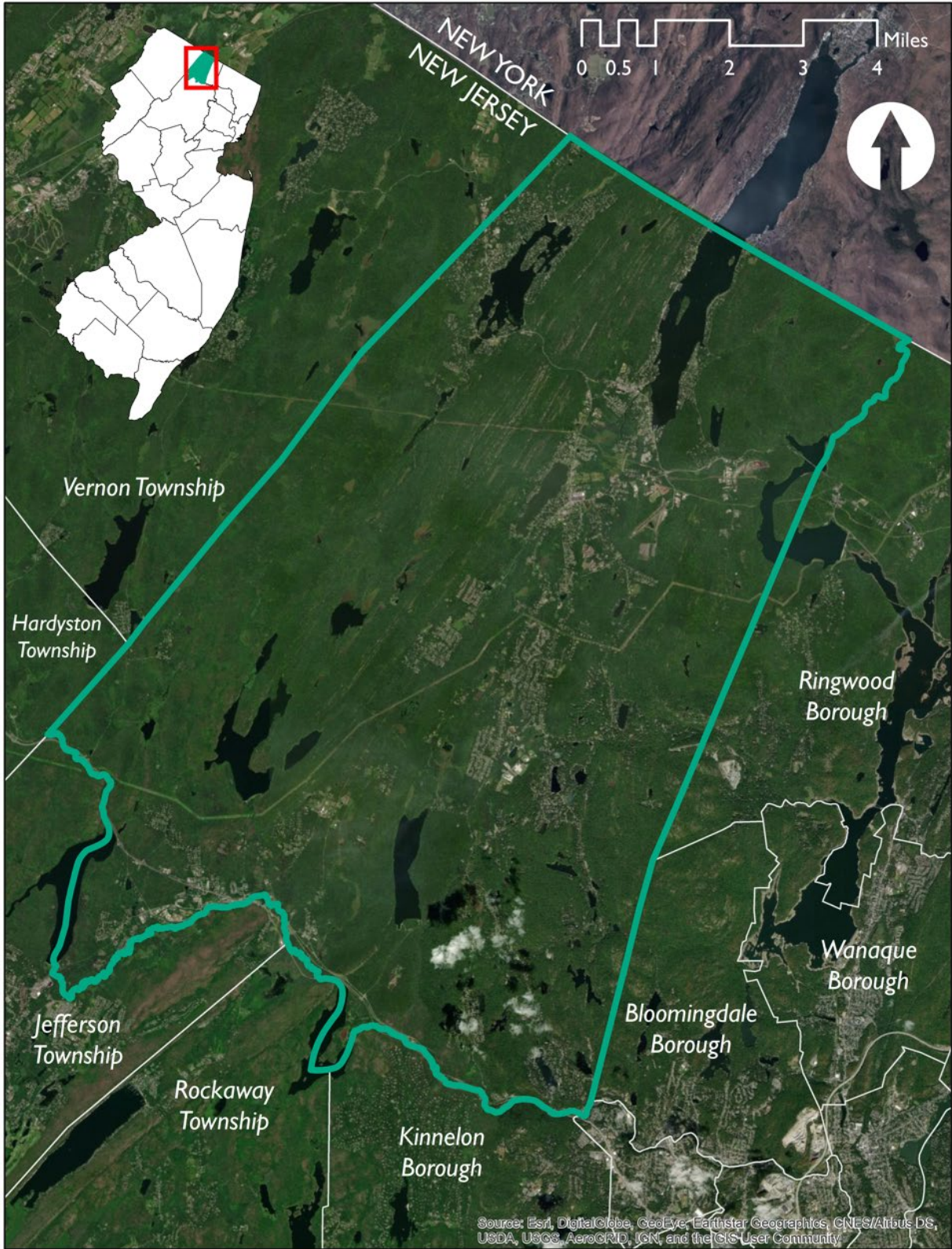


Figure 2. Location Map

Public Input and Findings

Public outreach sessions were conducted from August through November of 2020. These sessions included meetings with the following groups: the Economic Development Commission, Environmental Commission, Heritage Committee, Rotary Club, Sustainable West Milford, Friends of Wallisch Homestead, Ringwood State Park, and Wawayanda State Park. At the stakeholder meetings, which were held both via Zoom and in person, groups were asked to discuss West Milford’s strengths, weaknesses, opportunities, and threats (SWOT) and results were compiled into the following table.

Table 1. Stakeholder SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Many opportunities for ecotourism and agritourism ▪ Autumn Lights Festival ▪ Environmental Commission is very proactive ▪ Bed and breakfasts are permitted throughout the Township ▪ Lakes ▪ Good social media presence ▪ Administrative end of procedures for businesses is helpful ▪ Residents are generally supportive of sustainable practices/ordinances ▪ Jeremy Glick Trail ▪ Community events that support businesses have been helpful in the past (cash mobs, best pizza competitions, etc.) ▪ Consistent grant opportunities 	<ul style="list-style-type: none"> ▪ Connectivity ▪ Lack of parking at trailheads ▪ Adult recreation opportunities ▪ Communication between groups/committees/commissions ▪ Drawing visitors into stores ▪ No public beach access/boat ramps ▪ Lack of parking at Brown’s Point ▪ Many areas of interest but not central tourism center/wayfinding signage ▪ Multiple users of lakes presents conflict at times ▪ Township not understood by Trenton ▪ Highlands development limitations ▪ Taxes too high ▪ No town center ▪ Few opportunities for passive recreation
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Unique recreation/dining experience ▪ Working with NY/NJ Trails on connectivity ▪ Belcher’s Creek currently underutilized ▪ Advertising in stores, areas of interest, and the Township’s local cable station ▪ Newfoundland/Route 23 Area ▪ Brown’s Point ▪ Jungle Habitat ▪ Winter recreation at Greenwood Lake ▪ Connectivity to various Section 8 and other disenfranchised populations within the Township ▪ Camp Hope currently underutilized ▪ Green belt: properties that surround central commercial district and connect open space 	<ul style="list-style-type: none"> ▪ Increase in illegal activities such as ATV riding ▪ Absence of agreement in place for year-round activities at Jungle Habitat ▪ Many ideas for events/uses but often no follow through ▪ Overuse/misuse of State Parks and Trails ▪ Limited parking at State Parks

In addition to meetings with stakeholders, two surveys were distributed. The first survey was a business owner survey. The business survey received 53 responses, which is about 5% of the total number of businesses in the Township. Business owners that responded include professionals (lawyers, architects, etc.), service providers (salons, dance studios, etc.), retail, automotive repair, and manufacturing. The business owner survey gathered information on hours of operation, current level of business activity, number of employees, and the length of the

business operation. Additionally, business owners were asked to rate various aspects of owning a business in West Milford. Generally, the business climate and the market for products and services was ranked as “good,” but the regulatory and administrative environment as well as the mix of other businesses was ranked between “very poor” and “moderate.”

The second survey was a local shopper survey. The local shopper survey received 978 responses, 98% of which were West Milford residents. In general, respondents are shopping outside of the Township due to a lack of variety of products, stores, and convenience. A total of 84% of respondents indicated that the selection of goods and services is a major disadvantage of shopping in the Township. Other disadvantages were high prices (206 respondents or 21.7%) and poor appearance of buildings and stores (185 respondents or 19.5%). Respondents also indicated that they would like to see a movie theater, more diverse dining options, more diverse clothing stores, chain coffee shops and restaurants, and more options for grocery shopping.

When asked about the activities that would draw them to West Milford’s business districts, the following activities were mentioned: outdoor movies and concerts, street/craft fairs, family and senior activities, outdoor dining, flea markets, art and cooking classes, farmer’s markets, and game nights. Respondents were asked to describe how merchants can improve their stores. Respondents indicated that stores should improve their selections (691 respondents), improve store appearance (319), lower prices (272), expand store hours (220), and improve customer service (193). Those that selected “Other” included the following suggestions: better marketing and advertising, electric vehicle charging stations, online/phone purchasing with local pickup, a yearly list of vendors, delivery, and fun events.

When survey respondents were asked to rank what they feel West Milford’s economic development priorities should be, 710 respondents indicated that the number one priority should be year-round recreation and tourism. A total of 677 respondents said improving community facilities, and 364 respondents said high tech/emerging industries should be a priority. In general, the survey indicates that respondents have a good sense of safety and cleanliness throughout the Township. Additionally, respondents perceive employees of shops and shopping hours to be good.

A complete discussion of both surveys can be found in Appendix A.

Economic Development Commission Research

In 2017, the Economic Development Commission (EDC) attended West Milford’s Autumn Lights Festival (ALF) to gather feedback from residents about the Township’s needs. The results of the EDC’s data collection are in line with results from the surveys sent out for this Sustainable Economic Development Plan. The EDC received input from residents that included increasing the number of businesses, recreation opportunities such as bowling and jogging paths, events including a winter festival, artist colonies, spiritual retreats, and street closing days for community recreation. The EDC notes that the Township needs realistic, actionable plans with both short- and long-term steps. The results from the 2017 ALF Survey were used in this report to aid in developing West Milford’s vision.

Master Plan Policies, Goals and Vision for West Milford

The primary purpose of this plan is to create a vision and framework for a sustainable economy for the Township of West Milford. This vision will include goals and objectives related to land use, planning, economic development, tourism, open space preservation and trails development, historic preservation and business development. The vision for the Township is based on a sustainable economy which promotes the Township's tourism industry, in particular eco- and agritourism and heritage tourism. Activities and services that focus on agritourism, ecotourism and heritage tourism are proposed as viable economic drivers for the local economy.

General economic development policies included in the Master Plan which are particularly relevant to this report include:

- Promote economic development in existing communities without harming the integrity of the Highlands resources in the Township;
- Encourage activities that showcase the Township's vast natural, cultural, and historic resources without exploiting or squandering them;
- Emphasize and enhance the Township's existing downtown areas and historic communities; and
- Encourage development and support of small and home businesses.

The Township of West Milford adopted its last comprehensive Master Plan in 1987. Reexamination reports were completed in 1993, 1999, 2003, 2010 and 2013. An updated Circulation Element was adopted in 2005. An updated Open Space and Recreation Plan was developed in 2008 and is being updated in 2021, which is discussed later in this report. An updated Housing Element and Fair Share Plan was adopted in 2010. A Highlands Preservation Area Element was adopted in 2012. An updated Trails Master Plan was adopted in 2014. Finally, an updated Land Use Element was adopted in 2017.

2017 Master Plan/Land Use Plan Goals and Objectives

The 2017 Land Use Plan proposed the following goals from the 2003 Master Plan Reexamination to continue to govern Land Use in the municipality:

Goal 1: Preserve and protect the semi-rural and environmentally sensitive character of the Township.

Objectives:

1. Preserve scenic, cultural, historic, and environmentally sensitive land.
2. Encourage aesthetic, energy efficient and environmentally sensitive site design.
3. Promote farmland preservation through appropriate zoning.
4. Prevent sprawl type development.

Goal II: Preserve contiguous open space.

Objectives

1. Limit growth in and protect lands with major physical constraints and critical habitats.
2. Provide suitable land uses on sensitive lands through zoning.
3. Protect existing lakes and waterways from deterioration.
4. Encourage open space by the use of appropriate land use techniques.
5. Identify and implement a greenway network linking privately and publicly preserved lands.

Goal III: Protect water resources

Objectives:

1. Consider alternative and technological advancements in wastewater treatment.
2. Provide for methods of reducing storm water runoff and its impact through best storm water management practices.
3. Appropriately zone vacant land adjacent to open bodies of water for minimal development impact.
4. Protect areas of high groundwater recharge value.
5. Protect stream corridors.

Goal IV: Land/Use and Growth Management

Objectives:

1. Focus growth around existing business districts, encouraging infill and mixed land use.
2. Provide a range of housing opportunities that will encourage "least cost" housing and housing geared toward municipal needs.
3. Encourage commercial and industrial growth on suitable land in appropriate areas recognizing the existing roadway system
4. Promote recreational opportunities.
5. Provide for zoning standards that are consistent with existing neighborhoods.

Goal V: Regulate circulation patterns throughout the Township for through traffic and local traffic demands to residential and commercial land uses.

Objectives:

1. Improve roadways in response to traffic needs.
2. Encourage the continuation of the private road improvement program so that these residential communities can be serviced properly.
3. Encourage and plan for the use of mass transportation uses through additional park and ride facilities and bus services.
4. Encourage the development of multi-modal pathways.

Goal VI: Preserve character of existing lake communities.

Objectives:

1. Permit limited "infill" growth in existing lake communities consistent with the character of those communities.
2. Establish septic maintenance program.
3. Protect lake vistas.
4. Establish fertilizer, pesticide, and herbicide standards.
5. Minimize shoreline deforestation.

Goal VII: Encourage economic vitality of community business districts

Objectives:

1. Promote a functional physical environment consisting of streetscapes, pedestrian improvements, shared parking and building design criteria.

2021 Open Space and Recreation Plan Goals and Objectives

The Land Conservancy of New Jersey has prepared a 2021 Open Space and Recreation Plan (OSRP) update to West Milford's 2008 OSRP. This report will serve as a guide for the Township's Open Space Program. Goals of the 2021 OSRP include:

- Preserve semi-rural character;
- Preserve unique features;
- Enhance the quality of life and promote active, healthy lifestyles for residents;
- Protect land which contributes to drinking water quality and quantity; and
- Expand the trail and bicycle system.

The OSRP proposes several opportunities to preserve unique natural features, enhance the quality of life and promote active, healthy lifestyles for residents, and expand the trail and bicycle system which interconnects public lands and local businesses. The OSRP update should be used as a guide, in conjunction with this Plan, as the Township pursues connections between public spaces, residential areas, and commercial districts.

2021 Sustainable Economic Development Plan (SEDP) Vision, Goals, and Objectives

The Sustainable Economic Development Plan vision for West Milford is that the Township will be a semi-rural green community that weaves together scenic, cultural, historic, and environmentally sensitive lands including open spaces, parks, trails, lakes and streams, historic preservation sites, and community gathering places together with accessible, mixed-use commercial hamlets and residential neighborhoods to create a bucolic outdoor-oriented community. The Township of West Milford is a regional draw for eco-tourism, agri-tourism and heritage tourism. Greenways and trails, including a Town Center Trail, connect various parks, open spaces and heritage tourism sites to create opportunities for residents and visitors to access these natural, cultural and recreation sites in conjunction with the local commercial districts. The

increased tourism and revitalized residential areas draw in new businesses and promote revitalization of existing businesses within a sustainable and green economy.

To pursue this vision, the SEDP has the following goals and objectives:

- I. To become a year-round agri-tourism, eco-tourism, and heritage tourism destination.
 - a) Improve access to West Milford’s vast natural resources and open spaces by connecting greenways, promoting trails, and developing parks and recreation areas.
 - b) Connect commercial centers with recreation, open space areas and historic sites with trails and greenways.
 - c) Identify opportunities for combining recreational activities and food and retail to create unique and attractive destinations.
 - d) Identify opportunities to support agricultural areas, farms, and agri-tourism.
 - e) Identify opportunities to use vacant or abandoned parcels which may be viable for temporary commercial outdoor uses.

2. To increase connectivity throughout the Township through a comprehensive Circulation Plan update that promotes multi-modal transportation and the connection of greenways and open spaces.
 - a) Connect residential clusters to commercial centers and recreation areas through an interconnected trail system.
 - b) Complete existing sidewalks and trails that are not currently connected.
 - c) Identify opportunities for complete streets including bikeways.

3. To promote sustainability of existing built areas through a comprehensive update of the Township’s Land Use Plan Element including:
 - a) A review of existing and proposed zones to promote a mix of residential, commercial, and recreational uses throughout the Township.
 - b) Review zoning to promote and support small-scale rehabilitation and infill redevelopment.
 - c) Identify and zone village centers that have the potential to serve as destinations for both local residents running errands or recreational tourists looking for small-town charm.
 - d) Identify smart growth and sustainability strategies which, in part, considers potential locations for the installation of electric vehicle charging stations, storm resiliency with respect to energy supply, flood-prone areas, and environmental infrastructure and a climate change-related hazard vulnerability assessment.
 - e) Develop a map of areas to study as areas in need of redevelopment.

4. To create a welcoming environment for business owners where local businesses can thrive.
 - a) Make the process of starting and growing a business in the Township easy to understand, access, and execute.
 - b) Develop a business liaison position in the Township to assist new and existing businesses through the permitting process.
 - c) In order to preserve the scenic and natural resources in the Township, encourage new construction in existing developed areas and encourage the rehabilitation of existing developed buildings.
 - d) Encourage and assist business owners in growing their customer base with strategic marketing strategies and events.

5. To promote use of large underutilized areas for recreation, tourism, and commercial uses.
 - a) Identify and advertise underutilized or abandoned properties including, but not limited to: Brown's Point, Jungle Habitat, Belcher's Creek, Greenwood Lake, and Hillcrest School.
 - b) Create a list and map of abandoned or underutilized properties for study as areas in need of redevelopment.

6. To promote redevelopment and rehabilitation of existing developed areas through the targeted use of the Local Redevelopment and Housing Law and designating Highlands Redevelopment Areas:
 - a) Identify areas for study as Areas in Need of Redevelopment.
 - b) Identify potential programs to incentivize investment in existing structures through the Township's existing Area in Need of Rehabilitation.
 - c) Identify areas that would qualify for and benefit from Highlands Redevelopment Area designations.

7. To have efficient and accessible communication both between the Township and local businesses as well as between Township agencies.
 - a) Identify strategies for consistent communication and collaboration between Township entities to achieve overlapping goals and objectives.
 - b) Consider methods for consolidating land use and business services into one building in the Township for "one stop shopping".
 - c) Identify strategies for consistent communication between the Township, residents and the business community.

Socio-Economic Analysis

Background

To prepare West Milford’s Sustainable Economic Development Plan, it is essential to understand the socio-economic conditions in the Township. This includes a review of data related to population characteristics, employment, housing, and income. The number and types of jobs available in the Township, the types of industry, and a general market analysis also provide a framework for the analysis. This data—along with the status of the built environment from a land use perspective and analyses of infrastructure, existing land uses, roadways, and amenities—sets the backdrop for the socio-economic patterns in the Township. Understanding the existing socio-economic framework in the Township allows for the Township to develop policies that support positive and sustainable economic development.

Population

Passaic County and the State of New Jersey have both experienced steady increases in population over the last three decades. In contrast, the Township of West Milford’s population has remained relatively static. Between 1990 and 2000, the Township’s population increased by approximately 4 percent from 25,430 to 26,410. Between 2000 and 2010, the population decreased by approximately 2 percent to 25,850. The population increased again between 2010 and 2017 to 26,759, a 3.5 percent increase.

Table 2. Total Population, 1990 – 2017

Population	1990	2000	2010	2017 (Est.)
West Milford Township	24,530	26,410	25,850	26,759
Passaic County	453,060	489,049	501,226	510,563
State of New Jersey	7,763,000	8,414,350	8,791,894	8,960,161

Source: 1990, 2000, and 2010 U.S. Census Data | 2013-2017 American Community Survey 5-Year Estimates

Age and Gender

According to the U.S. Census Bureau, 2013-2017 ACS 5-Year Estimates, the median age of West Milford’s residents in 2017 was 44.5 years old. The largest age cohort is 50 to 54 years old (9.61%), followed by those aged 55 to 59 years (8.29%) and 45 to 49 years (8.05%). The nonworking population is, generally, those under 18 years old (24.83%) and those over 65 years (15.51%). The working population consists of the remaining 59.66% of residents.

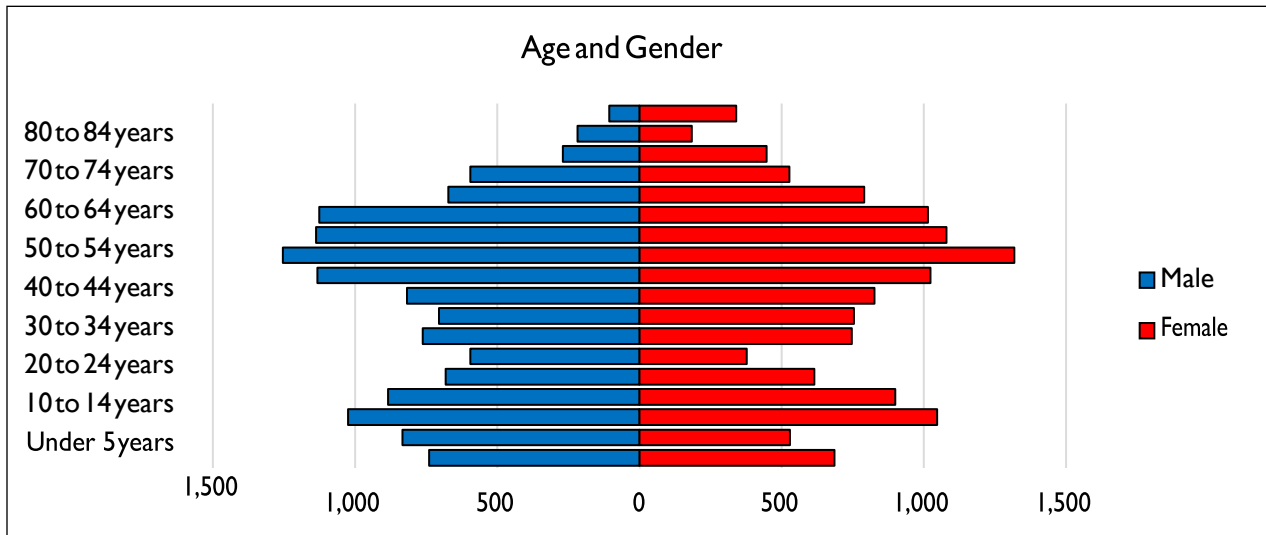
Table 3. Total Population by Age Group

Age	2017 5-Year Estimates	Percentage
Total population	26,759	(X)
Under 5 years	1,426	5.3%
5 to 9 years	1,363	5.1%
10 to 14 years	2,071	7.7%
15 to 19 years	1,784	6.7%
20 to 24 years	1,296	4.8%
25 to 29 years	972	3.6%
30 to 34 years	1,509	5.6%
35 to 39 years	1,460	5.5%
40 to 44 years	1,644	6.1%
45 to 49 years	2,155	8.1%
50 to 54 years	2,572	9.6%
55 to 59 years	2,217	8.3%
60 to 64 years	2,140	8.0%
65 to 69 years	1,463	5.5%
70 to 74 years	1,122	4.2%
75 to 79 years	716	2.7%
80 to 84 years	402	1.5%
85 years and over	447	1.7%

Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates

There was roughly an even distribution of males (53.40%) and females (49.37%) in 2017, according to the American Community Survey 5-Year Estimates.

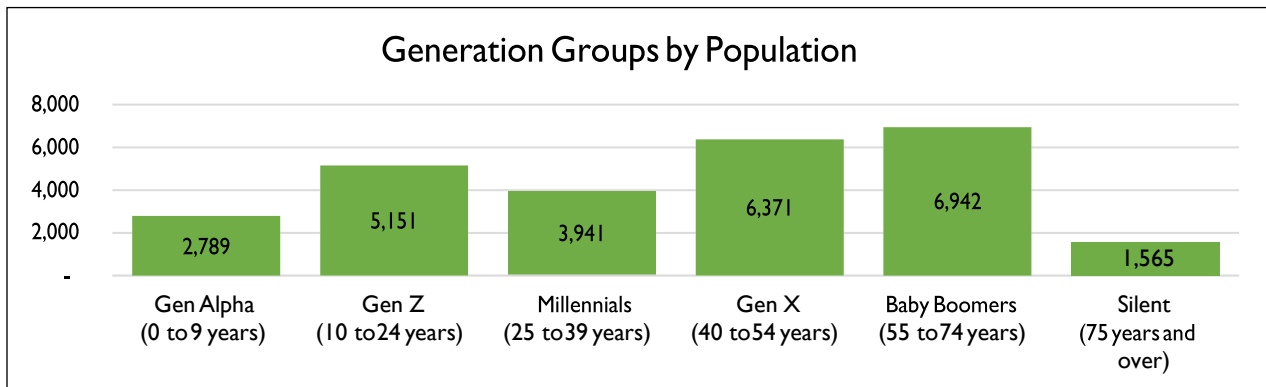
Figure 3. Age and Gender



Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates

The largest generation groups living in West Milford are Baby Boomers (25.9%) and Gen X (23.8%), followed by Gen Z (19.2%).

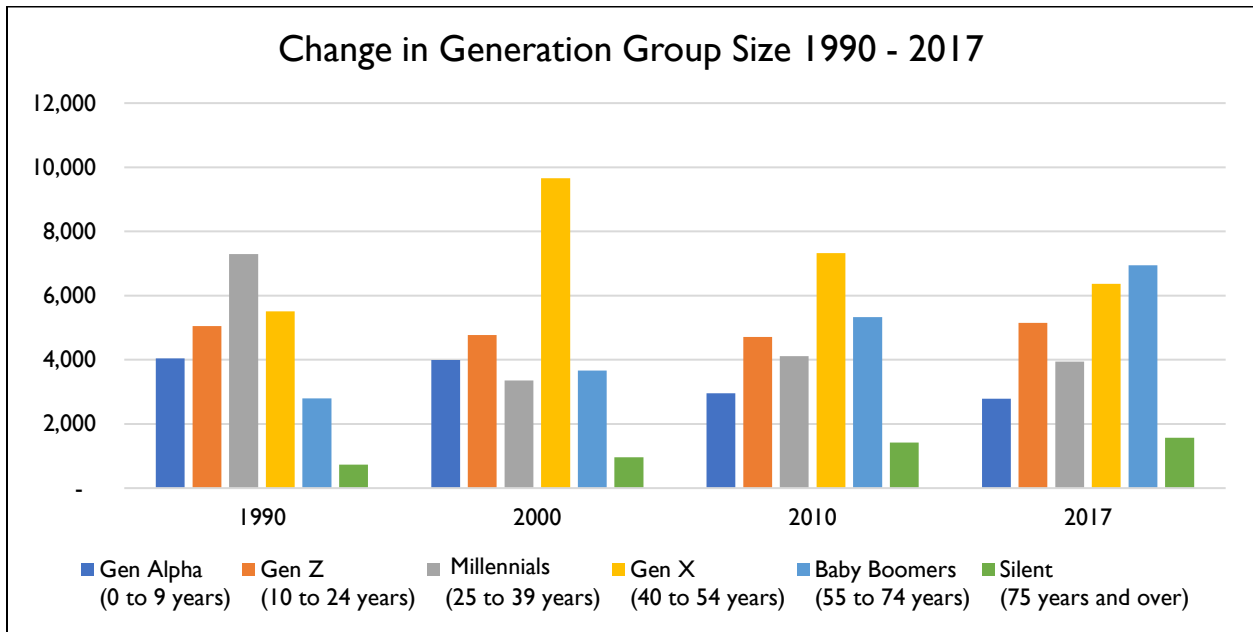
Figure 4. Generation Groups by Size (2017 Estimates)



Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates

The following chart illustrates how these generation groups have changed over the years. The number of children under age 10 has been steadily decreasing since 1990. Alternatively, the population of Baby Boomers (those aged 55 to 74 years) has been increasing. The middle generations have been fluctuating over the past 30 years, with a notable increase of Gen X (40 to 54 years) in 2000, followed by a decline. As noted previously, the total population has remained relatively steady since 1990, with only minor increases and decreases.

Figure 5. Change in Generations (1990 – 2017)



Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimate

Table 4. Changes in West Milford's Total Population (1990 – 2017)

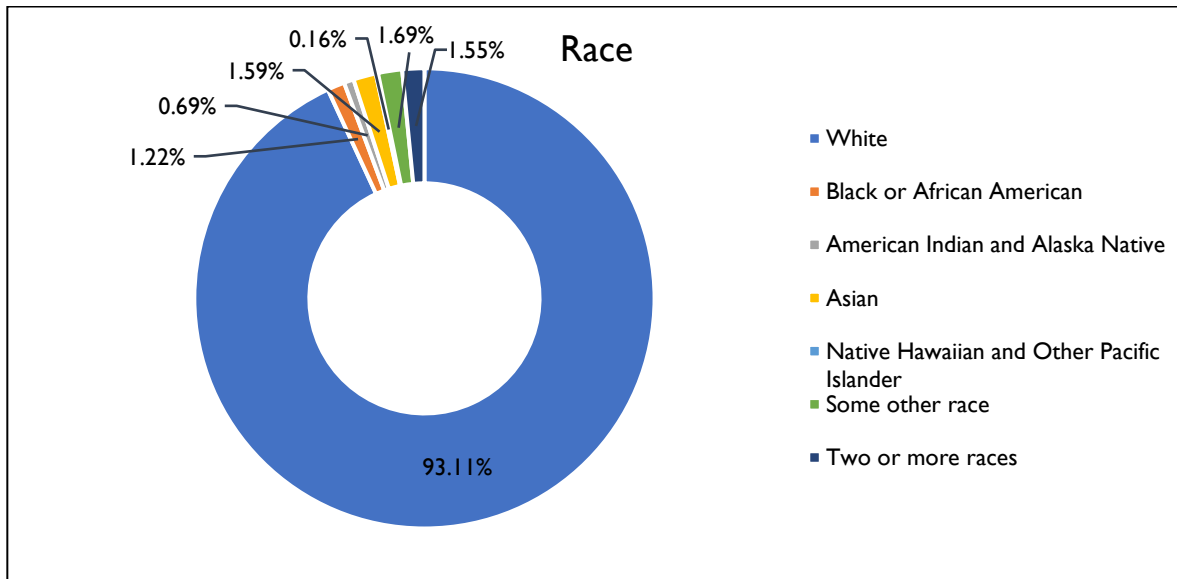
	1990	2000	2010	2017
Total Population	25,430	26,410 ▲	25,850 ▼	26,759 ▲

Race and Ethnicity

To understand the ongoing population trends and the consumer market in West Milford, it is important to understand demographic trends in race and ethnicity of the residents. This section provides an overview on the type of markets preferred based on the cultural background of West Milford's residents.

The vast majority of West Milford residents are white (93.11%). Residents who are Black or African American (1.22%), American Indian and Alaska Native (0.69%), Asian (1.59%), Native Hawaiian or Other Pacific Islander (0.16%), some other race (1.69%), or two or more races (1.55%) are relatively evenly distributed.

Figure 6. Race



Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates

The U.S. Census tracks ethnicity as it relates to Hispanic or Latino descent; Hispanic or Latino can be of any race. When looking at ethnicity, roughly 9.1% of West Milford’s population is Hispanic or Latino. This reflects a fairly homogenous population of those who do not identify as Hispanic or Latino.

Figure 7. Ethnicity



Population Forecast

In 2017, the North Jersey Transportation Planning Authority (“NJTPA”) provided population forecasts for the municipalities in its region. It should be noted that the NJTPA’s forecasts have historically been higher than the figures reported by the U.S. Census. In 2010, for example, the NJTPA forecasted a population of 29,020, but the U.S. Census reported a population of 25,850. For 2020, the NJTPA forecasts a population of 30,050, a 12% increase from the 2017 ACS Estimates. Though the forecasts tend to be higher than the figures reported by the U.S. Census, they indicate a relatively stable population with only slight increases up to the year 2030.

Table 5. Population Forecasts

	2000	2005	2010	2015	2020	2025	2030
West Milford Population	26,410	28,730	29,020	29,400	30,050	30,960	32,040

Source: North Jersey Transportation Planning Authority 2017 forecasts

Income

According to the ACS 2017 5-Year Estimates, the working population (those aged 16 and older) was 21,563. Of that number, 13,983 (64.80%) were employed and 727 (3.40%) were unemployed. The median household income was \$98,843. With that in mind, about 3.1% of households (approximately 294 families) had an income that was below the poverty line.

Household Size

The ACS 2017 5-Year Estimates reported 9,508 total households in West Milford in 2017. The average household size was 2.78 persons.

Table 6. Household Size (2017)

Household Size	Estimate
Total:	9,508
Family households:	7,063
2-person household	2,867
3-person household	1,534
4-person household	1,933
5-person household	536
6-person household	132
7-or-more person household	61
Nonfamily households:	2,445
1-person household	2,066
2-person household	328
3-person household	42

Source: U.S. Census Bureau | 2013-2017 American Community Survey 5-Year Estimates

Market Tapestry Segmentation

ESRI provides information on demographics by segmenting the population based on a variety of demographic characteristics, including spending habits. There are 67 unique segments throughout the United States. Because of West Milford’s size, there are multiple unincorporated communities throughout the Township, all of which have different populations and subsequently different markets.

Figure 8. Market Tapestry Segmentation by Community

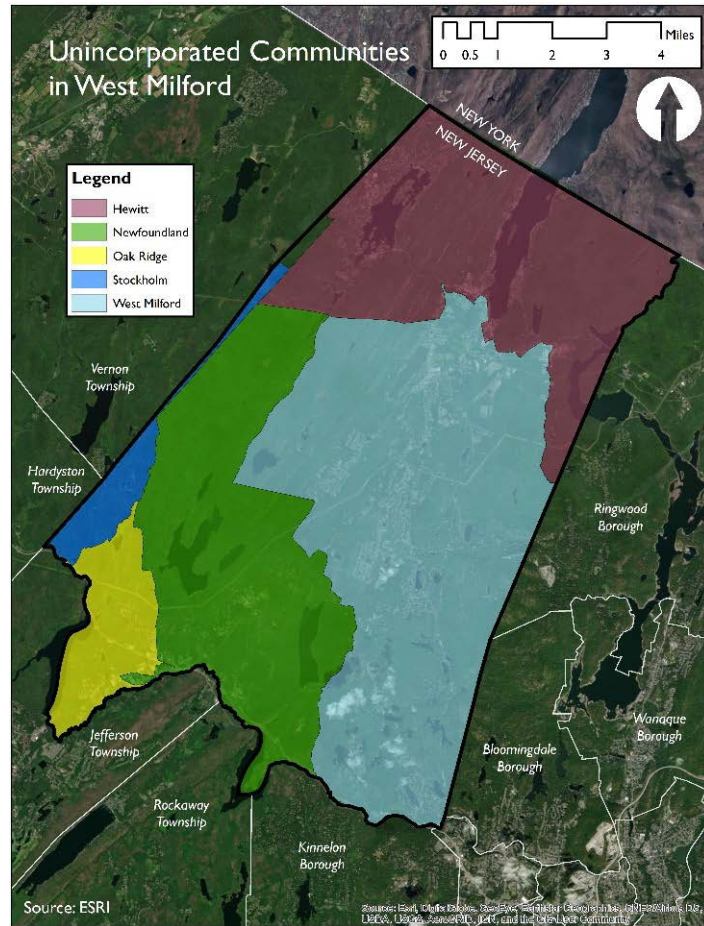


Table 7. Esri Tapestry Segmentation Data by ZIP Code

Community	Tapestry Segmentation		
Hewitt	Pleasantville (29.3%)	Green Acres (25.7%)	Soccer Moms (17.4%)
Newfoundland	Savvy Suburbanites (61.4%)	Pleasantville (31.5%)	Soccer Moms (6.6%)
Oak Ridge	Pleasantville (37.8%)	Savvy Suburbanites (23.3%)	Soccer Moms (23.0%)
Stockholm	Green Acres (43.2%)	Savvy Suburbanites (37.6%)	mPleasantville (19.2%)
West Milford	Savvy Suburbanites (29.7%)	Pleasantville (23.9%)	Golden Years (22.4%)

Source: Esri

According to the ESRI Tapestry segmentation, West Milford Township is primarily composed of the Pleasantville and Savvy Suburbanites categories, though there are a significant number of Green Acres residents. The smaller categories consist of Soccer Moms and Golden Years residents. Each of these are described in Table 8, below.

Table 8. Market Descriptions

Pleasantville	Prosperous domesticity best describes the settled denizens of <i>Pleasantville</i> . Situated principally in older housing in suburban areas, these slightly older couples move less than any other market. Many couples have already transitioned to empty nesters; many are still home to adult children. Families own older, single-family homes and maintain their standard of living with dual incomes. These consumers have higher incomes and home values and much higher net worth. Older homes require upkeep; home improvement and remodeling projects are a priority — preferably done by contractors. Residents spend their spare time participating in a variety of sports or watching movies. They shop online and in a variety of stores, from upscale to discount, and use the Internet largely for financial purposes.
Savvy Suburbanites	<i>Savvy Suburbanites</i> residents are well educated, well read, and well capitalized. Families include empty nesters and empty nester wannabes, who still have adult children at home. Located in older neighborhoods outside the urban core, their suburban lifestyle includes home remodeling and gardening plus the active pursuit of sports and exercise. They enjoy good food and wine, plus the amenities of the city’s cultural events.
Green Acres	The <i>Green Acres</i> lifestyle features country living and self-reliance. They are avid do-it-yourselfers, maintaining and remodeling their homes, with all the necessary power tools to accomplish the jobs. Gardening, especially growing vegetables, is also a priority, again with the right tools, tillers, tractors, and riding mowers. Outdoor living also features a variety of sports: hunting and fishing, motorcycling, hiking and camping, and even golf. Self-described conservatives, residents of Green Acres remain pessimistic about the near future yet are heavily invested in it.
Soccer Moms	<i>Soccer Moms</i> is an affluent, family-oriented market with a country flavor. Residents are partial to new housing away from the bustle of the city but close enough to commute to professional job centers. Life in this suburban wilderness offsets the hectic pace of two working parents with growing children. They favor time-saving devices, like banking online or housekeeping services, and family-oriented pursuits.
Golden Years	Independent, active seniors nearing the end of their careers or already in retirement best describes <i>Golden Years</i> residents. This market is primarily singles living alone or empty nesters. Those still active in the labor force are employed in professional occupations; however, these consumers are actively pursuing a variety of leisure interests—travel, sports, dining out, museums, and concerts. They are involved, focused on physical fitness, and enjoying their lives. This market is smaller but growing and financially secure.

Source: Esri

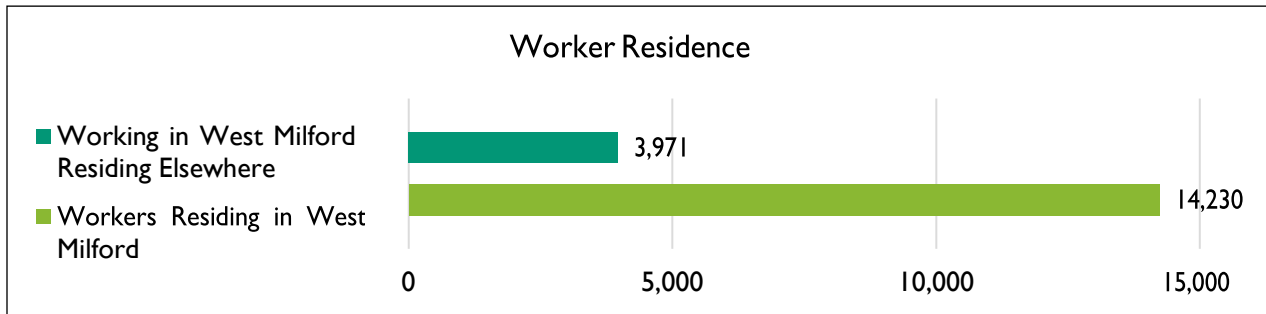
Each one of these groups has different trends as consumers. Pleasantville residents are educated and employed, are mostly affluent, and typically are not cost-conscious. Savvy Suburbanites are also well-educated, have an even higher labor force participation rate, and are generally more prone to doing research before making purchases. Green Acres residents have a high population of college-educated residents. These individuals are cautious consumers, similar to Savvy Suburbanites. The Soccer Moms market consists of fewer college graduates and high labor force participation rates. These residents carry high levels of debt but are well-insured. Golden Years residents are very well-educated and have a low labor force participation rate. The median

income in this market is higher, and residents are obtaining that income primarily from investments, Social Security benefits, and retirement income.

Employment Characteristics

The U.S. Census maintains the Longitudinal Employer-Household Dynamics (LEHD) dataset. This dataset distinguishes between workers who work in the Township but reside elsewhere (3,971) and workers who reside in West Milford (14,230).

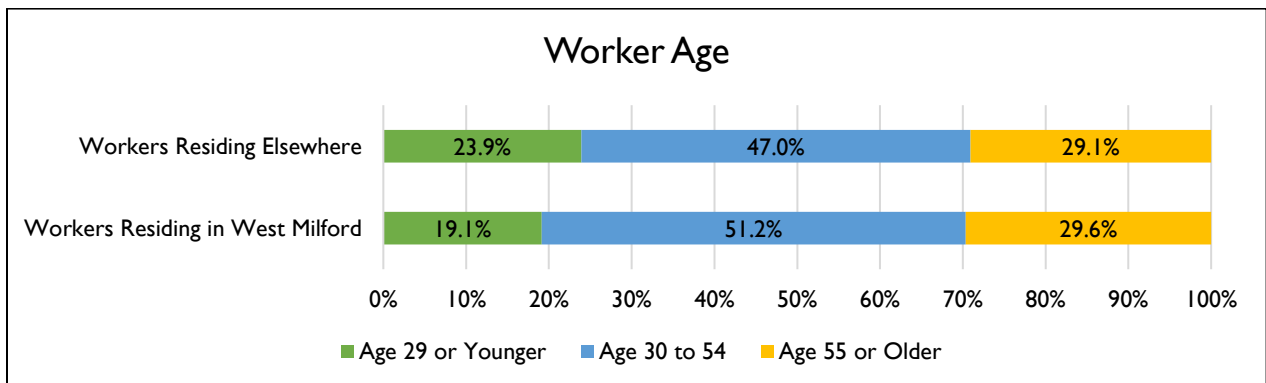
Figure 9. Worker Residence (2017)



Source: U.S. Census Bureau, Center for Economic Studies

Figure 10, below, illustrates the age of West Milford’s working population. In both resident and nonresident groups, the majority of people are between the ages of 30 to 34, and the next largest group is those aged 55 years or older. In both categories, but especially those residing in West Milford, the fewest number of workers were younger than 30.

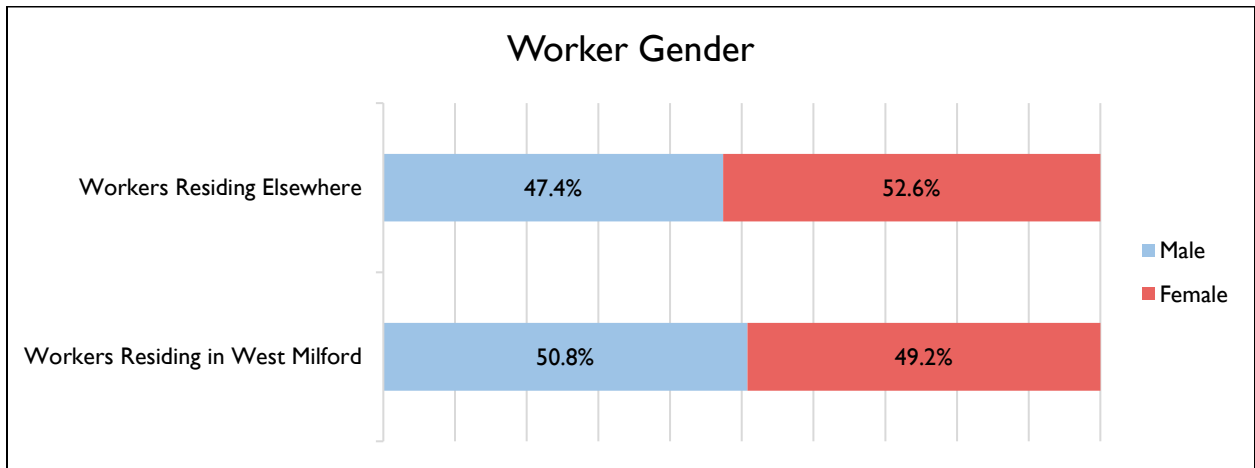
Figure 10. Worker Age (2017)



Source: U.S. Census Bureau, Center for Economic Studies

For the population that commuted into West Milford, there were slightly more women (52.6%) than there were men (47.4%). In the population that lived and worked in West Milford, just over half of the population were men (50.8%).

Figure 11. Worker Gender (2017)



Source: U.S. Census Bureau, Center for Economic Studies

According to the U.S. Census Bureau’s Center for Economic Studies, the majority of workers in West Milford are white and not Hispanic or Latino.

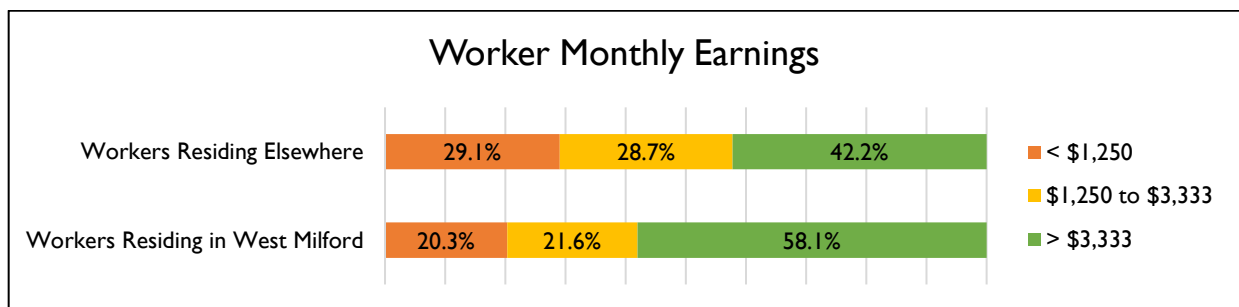
Figure 12. Worker Ethnicity



Source: U.S. Census Bureau, Center for Economic Studies

The U.S. Census Bureau’s Center for Economic Studies found that a significantly higher percentage of workers residing in West Milford earn more than \$3,333 per month than West Milford workers residing elsewhere. West Milford residents were also less likely to fall within the middle- and lower-income categories than local workers who reside elsewhere.

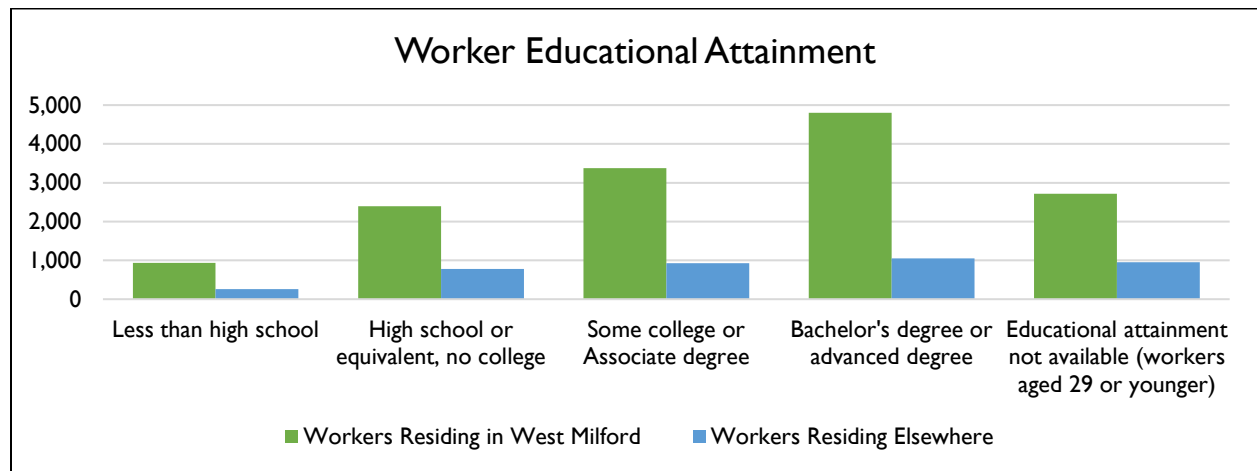
Figure 13. Worker Monthly Earnings



Source: U.S. Census Bureau, Center for Economic Studies

The U.S. Census Bureau’s Center for Economic Studies found that both those living in West Milford and those residing elsewhere have similar trends in educational attainment, except that residents were somewhat more likely to have a bachelor’s or advanced degree (34%) than non-residents (26.5%). The largest group in both classes includes those individuals with a bachelor’s degree or advanced degree and the smallest group includes those individuals with less than a high school education. This reflects a relatively high population of educated workers in West Milford. It should be noted, however, that the third largest group includes individuals for whom data was not available (workers aged 29 or younger), so that could affect the numbers of these groups.

Figure 14. Worker Educational Attainment



Source: U.S. Census Bureau, Center for Economic Studies

Industry Data

Industry data was obtained from the LEHD using NAICS categories. NAICS stands for North American Industry Classification System and is the standard for Federal statistical agencies (Census, Bureau of Labor and Statistics, etc.). Table 9, below, showing the LEHD data for both those workers living and working in West Milford (HOME) and those working in West Milford but residing elsewhere (WORK).

Table 9. NAICS Classifications

HOME		NAICS CLASSIFICATION	WORK	
Count	Share		Count	Share
25	0.2%	Agriculture, Forestry, Fishing, and Hunting	9	0.2%
13	0.1%	Mining, Quarrying, and Oil and Gas Extraction	1	0.0%
83	0.6%	Utilities	3	0.1%
984	6.9%	Construction	386	9.7%
952	6.7%	Manufacturing	59	1.5%
889	6.2%	Wholesale Trade	108	2.7%
1,742	12.2%	Retail Trade	594	15.0%
461	3.2%	Transportation and Warehousing	35	0.9%
341	2.4%	Information	15	0.4%
559	3.9%	Finance and Insurance	62	1.6%
228	1.6%	Real Estate and Rental and Leasing	25	0.6%
1,158	8.1%	Professional, Scientific, and Technical Services	177	4.5%
406	2.9%	Management of Companies and Enterprises	190	4.8%
769	5.4%	Administration & Support, Waste Management and Remediation	150	3.8%
1,647	11.6%	Educational Services	749	18.9%
1,853	13.0%	Health Care and Social Assistance	671	16.9%
221	1.6%	Arts, Entertainment, and Recreation	34	0.9%
831	5.8%	Accommodation and Food Services	318	8.0%
498	3.5%	Other Services (excluding Public Administration)	208	5.2%
570	4.0%	Public Administration	177	4.5%

Source: U.S. Census Bureau, Center for Economic Studies, Longitudinal Employer-Household Dynamics

The largest employer categories for West Milford’s working population are Health Care and Social Assistance (13.0%), followed by Retail Trade (12.2%) and Educational Services (11.6%).

The Health Care and Social Assistance sector comprises establishments providing health care and social assistance for individuals. The sector includes both health care and social assistance because it is sometimes difficult to distinguish between the boundaries of these two activities. The industries in this sector are arranged on a continuum starting with those establishments providing medical care exclusively, continuing with those providing health care and social assistance, and finally finishing with those providing only social assistance. The services provided by establishments in this sector are delivered by trained professionals. All industries in the sector share this commonality of process, namely, labor inputs of health practitioners or social workers with the requisite expertise. Many of the industries in the sector are defined based on the educational degree held by the practitioners included in the industry.

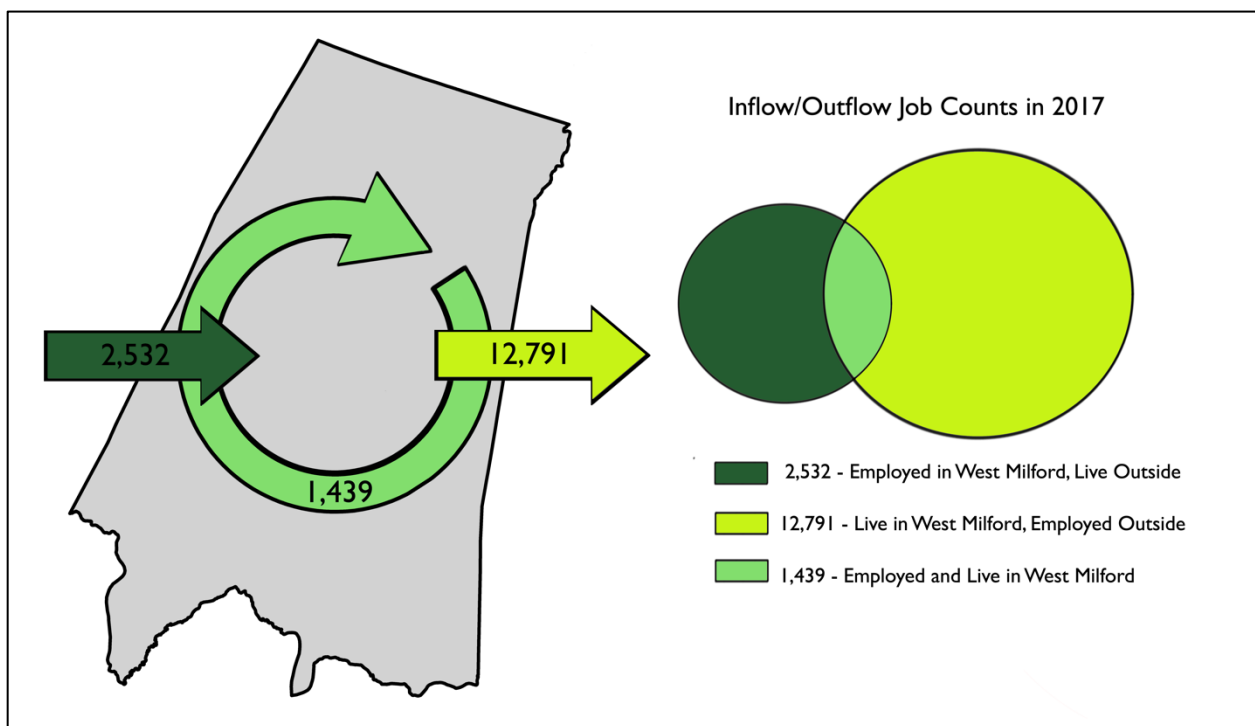
North American Industry Classification System

Commuting Patterns

There are three commuting groups, according to the U.S. Census Bureau: those that are employed in West Milford and reside elsewhere, those that live in West Milford and work elsewhere (the largest group), and those that both work and live in West Milford. Figure 15 illustrates these groups. Note that the arrows do not indicate the direction in which workers are traveling, but whether they are entering, leaving, or remaining in West Milford for work.

Figure 15 illustrates that approximately 1,439 people live and work in West Milford, 2,532 people reside elsewhere and commute into West Milford, and 12,791 people live in West Milford but commute outside of the Township for work.

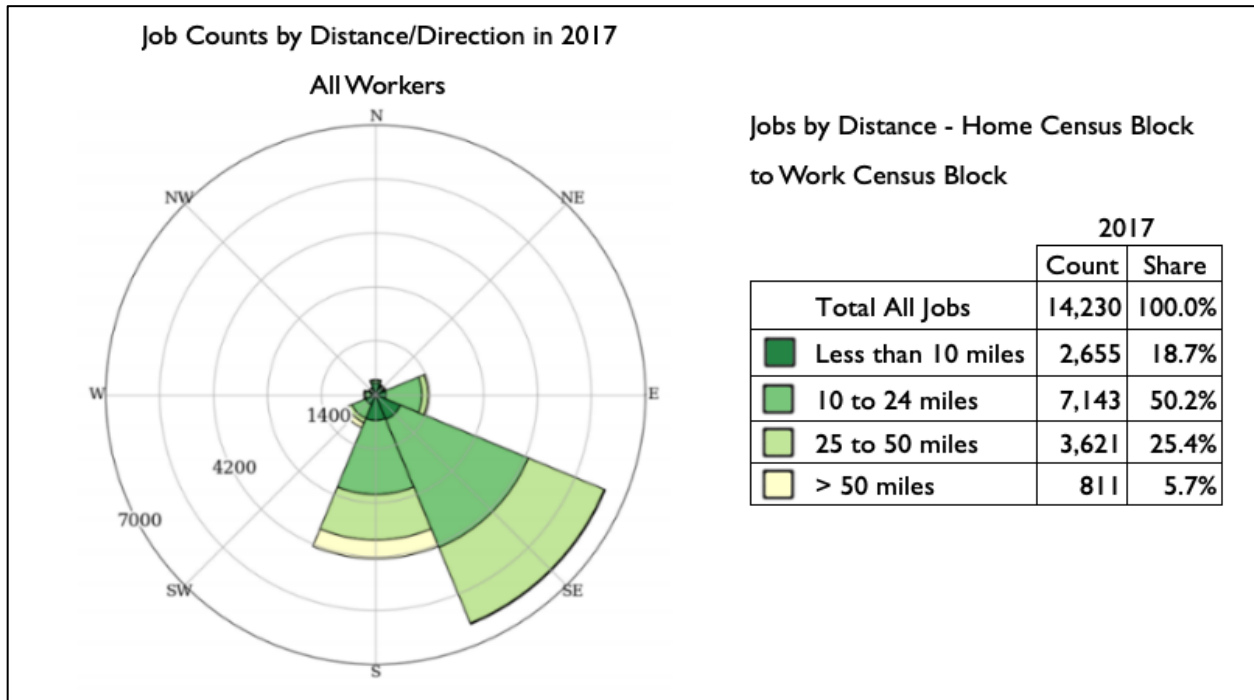
Figure 15. Total Inflow/Outflow of Workers in West Milford



Data source: U.S. Census Bureau, Center for Economic Studies

Most of the workers that reside in West Milford and work elsewhere travel south and southeast, between 10 and 50 miles (Figure 16). More specifically, of the individuals that live in the Township, most are commuting to Manhattan (5.8%), Wayne Township (4.0%), and Parsippany-Troy Hills (2.7%) (Table 10).

Figure 16. Commute of Workers Who Reside in West Milford



Source: U.S. Census Bureau, Center for Economic Studies

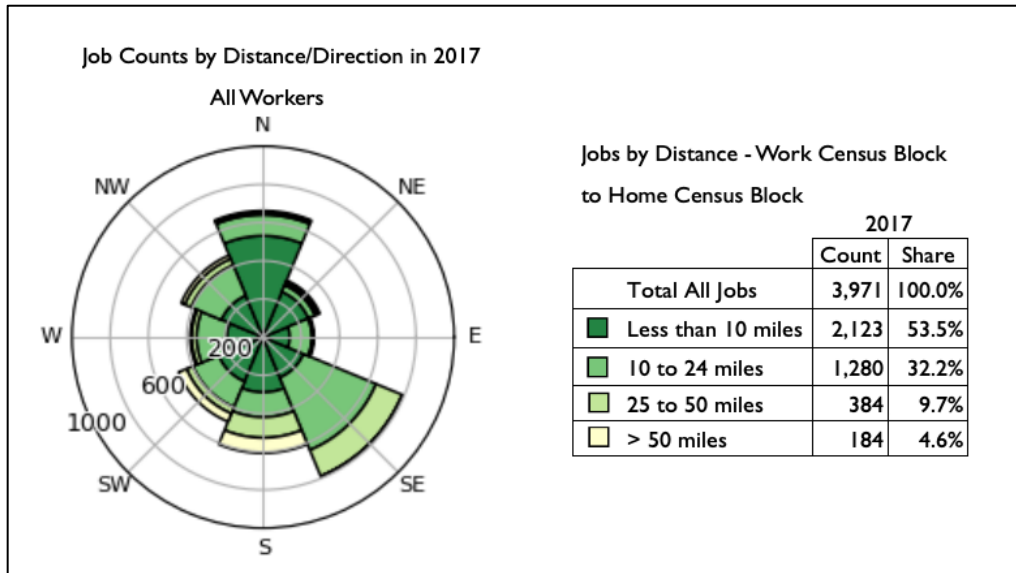
Table 10. Job Counts (2017)

Job Counts by County Subdivisions Where Workers are Employed		
All County Subdivisions	14,230	100.00%
West Milford township (Passaic, NJ)	1,439	10.1%
Manhattan borough (New York, NY)	820	5.8%
Wayne township (Passaic, NJ)	566	4.0%
Parsippany-Troy Hills township (Morris, NJ)	382	2.7%
Paterson city (Passaic, NJ)	323	2.3%
Mahwah township (Bergen, NJ)	311	2.2%
Paramus borough (Bergen, NJ)	304	2.1%
Newark city (Essex, NJ)	252	1.8%
Ramsey borough (Bergen, NJ)	223	1.6%
Clifton city (Passaic, NJ)	216	1.5%
All other locations	9,394	66.0%

Source: U.S. Census Bureau, Center for Economic Studies

There is much more variation when it comes to the directions that people travel when they live outside of West Milford and travel into the Township to work. Most individuals are commuting into the Township 25 to 50 miles from the southeast, and many people are traveling in from the north.

Figure 17. Commute of Workers Employed in West Milford Who Reside Elsewhere



Source: U.S. Census Bureau, Center for Economic Studies

Workers from West Milford are more likely to drive to work (88.60%) than use any other form of transportation. The next most popular mode of transportation to work is public transportation (3.20%). 6.40 percent of West Milford residents worked at home.

Table 11. Mode of Transportation to Work

Means of Transportation to Work	2017 Estimate
Car, truck, or van	88.60%
Drove alone	81.80%
Carpooled	6.80%
In 2-person carpool	5.70%
In 3-person carpool	0.90%
In 4-or-more person carpool	0.10%
Workers per car, truck, or van	1.04%
Public transportation (excluding taxicab)	3.20%
Walked	1.40%
Bicycle	0.10%
Taxicab, motorcycle, or other means	0.30%
Worked at home	6.40%

Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates

Built Environment Analysis

Land Use

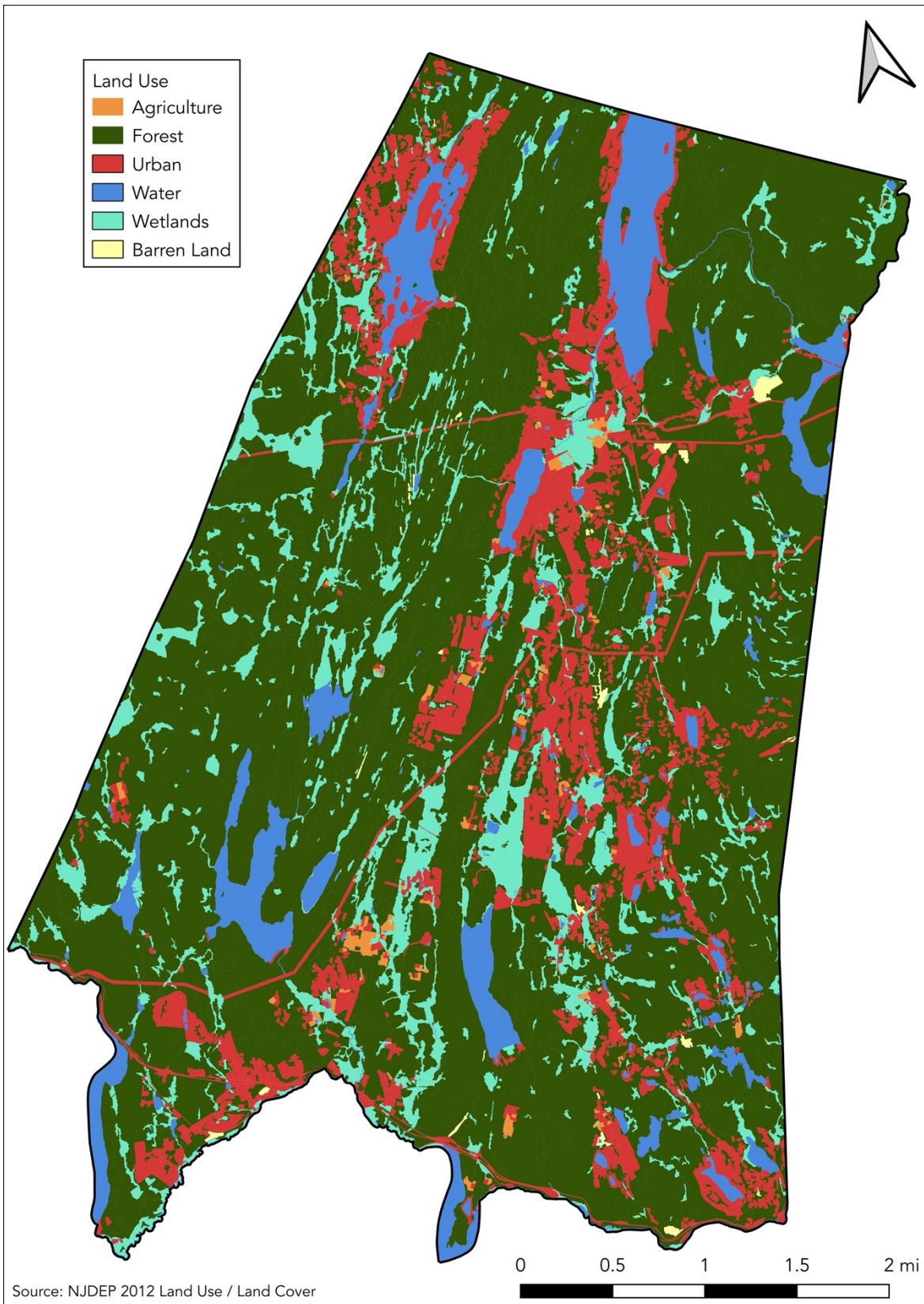
Table 12 and Figure 18 on the following page depict land use and land cover in the Township. Forested land constitutes more than two-thirds (73.82%) of all land in the Township. Urban uses constitute 10.33% of the Township, typically centered around the lakes and major roadways. Wetlands cover 8.43% of land and water covers 6.79%. Less than 1% of the Township is used for Agricultural purposes.

Table 12. Land Use and Land Cover

Land Use / Land Cover Type (2012)		
	Acreage	Percentage
Agricultural Land	296.83	0.43
Barren Land	130.32	0.19
Forest	50,606.24	73.82
Urban	7,083.98	10.33
Water	4,658.14	6.79
Wetlands	5,780.98	8.43

Source: 2012 NJDEP Land Use/Land Cover (Updated 2015)

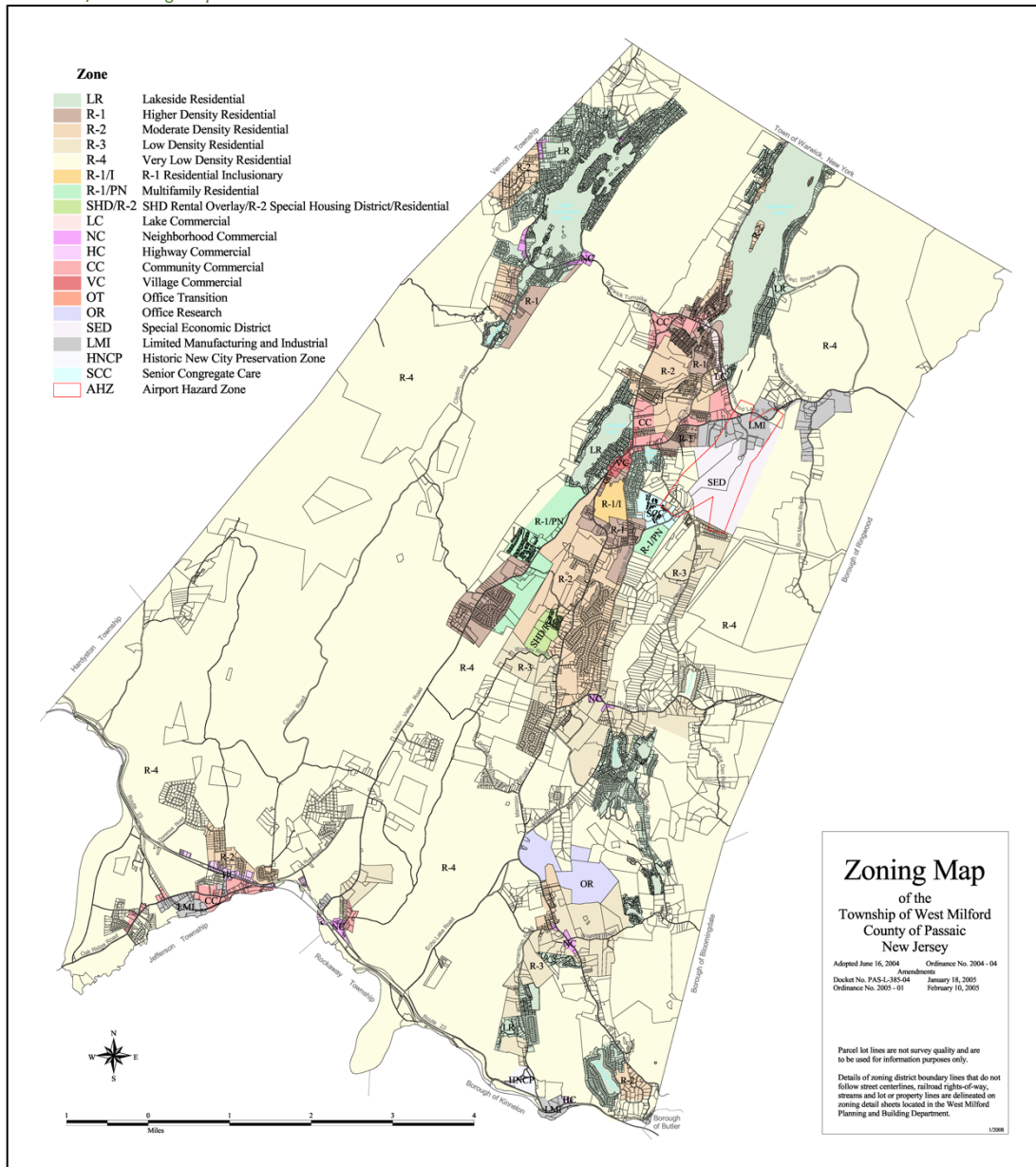
Figure 18. 2012 Land Use / Land Cover



Economic Development Zoning Districts

Though environmentally constrained, West Milford has multiple zoning districts that allow for various commercial, limited industrial, and office uses (Figure 19). These districts include the following: Neighborhood Commercial, Community Commercial, Lake Commercial, Village Commercial, Highway Commercial Districts, Residential and Professional/Limited Service Districts, and the Office Transition Zone.

Figure 19. West Milford Zoning Map



Notably, all of the commercial zones below allow for bed-and-breakfasts and/or hotels and motels, as well as provisions for locating wireless telecommunications facilities for state-of-the-

art communications services. These provisions should be advertised to potential business owners in the Township.

Neighborhood Commercial and Community Commercial Districts

The purpose of these districts, as stated in the Township’s ordinance, “...is to provide areas throughout the Township where retail and service businesses may be located primarily for the convenience of the Township residents.” The Neighborhood Commercial District is located in small clusters along major roads (Macopin Road, Route 23, Warwick Turnpike, and Westbrook Road). The Community Commercial Districts typically surround the Neighborhood Commercial District and cover a larger area.

Lake Commercial District

The purpose of this district, in addition to promoting recreational potential of the Township’s lakes, is to prohibit uses that will detract from the natural resources. This district is located at the southern end of Greenwood Lake.

Village Commercial District

The Village Commercial District is intended to incorporate design elements of the local community, such as “...the location of buildings within proximity to the street, coordinated parking facilities, [and] a uniform street and architectural landscape design throughout the Town center corridor,” according to the Township’s ordinance. Pedestrian movement and congregation is encouraged through design in this district. This district is located on Union Valley Road in the center of the Township.

Highway Commercial District

Located in the southern portion of the Township along Route 23, the purpose of this district is to allow for highway-related commercial activities in addition to retail and service uses.

Residential and Professional/Limited Service Districts

This district acts as a transition area between a residential area that, traditionally, has developed historically with professional and limited service uses.

Office Transition Zone

According to the Township’s ordinance, the purpose of this district “...is to provide an office district in a less intensive transition zone between the more intensive commercial zones and residential zones. The standards are intended to allow for nonresidential development that has residential character by establishing such criteria as residential setbacks, controlled access points and the merging of adjoining parking lots in the side and rear yards to preserve front yard landscaped areas.”

Market Analysis

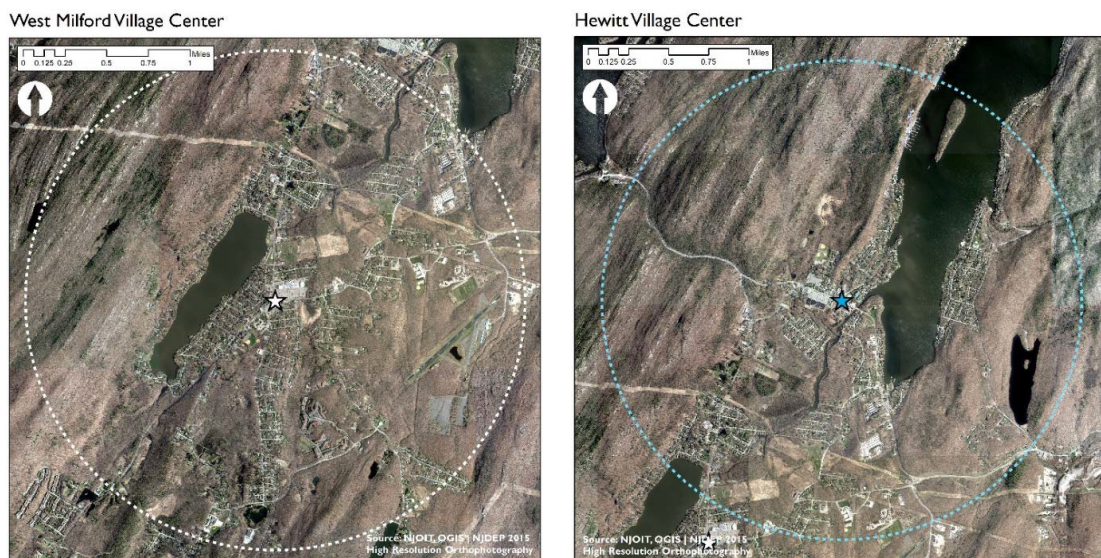
The Township of West Milford’s Market Analysis identifies the municipality’s current market profile and provides a demographic overview of employment and income. This information provides insight into current economic and job conditions and reveals where opportunities may exist for growth. This analysis will report specifically on residential and retail market demands as well as current tourism data to reveal economic focus areas and enhancements that would be beneficial to the Township.

Residential Market Demand

A thorough investigation of the residential market demand is a crucial step towards understanding the level of vibrancy that potential future residents could bring to the Township and surrounding market areas including the West Milford Shopping Center near the West Milford Municipal complex and downtown Hewitt near Greenwood Lake. The residential market area is the area that could generate new households that might become residents in new housing in the Village Center. It is also the area in which residential development would compete to attract new households.

The residential market area boundary is defined as anywhere that is within a 30-minute drive of the Village Center. The Township of West Milford has two Village Centers that will be the focus of this market analysis. The first Village Center is known as the West Milford Municipal Complex (referred to as “West Milford Village Center” or the “Town Center”) which is located near the intersection of Union Valley Road and Marshall Hill Road; the second is located in downtown Hewitt (referred to as “Hewitt Village Center”) near the intersection of Union Valley Road and Lakeside Road. The Village Center areas in West Milford are defined as those areas within 1½ miles of the intersections described above. These boundaries help to estimate the future growth within the residential market area, and within each Village Center.

Figure 20. Village Center Areas



Market Area Demographics

To better understand the possible impacts of demographics on residential market demand, Table 13 provides select characteristics for the residential market area which is within a 30-minute drive time of the West Milford Village Center and the Hewitt Village Center. See Figure 17 for maps of the Village Center areas. While this analysis considers each Village Center independently, it should be noted that the 30-minute drive time boundary area for each residential market area includes a significant area of overlap. Each village center in fact lies within the other’s residential market demand area. This overlap should be kept in mind in interpreting the findings that follow.

In 2019, an estimated 295,450 people lived in the residential market area associate with the West Milford Village Center. Esri projects that this area’s population will grow by 0.21% each year, adding another 3,114 people by 2024. Esri projects that the number of households in the market area will grow by 0.27% every year, adding 1,388 households over the next five years. These households are anticipated to have a median annual income of \$157,583.

The Hewitt Village Center had approximately 302,349 people in 2019 living in its residential market area. Esri estimates that this area’s population will grow by 0.28% each year, adding another 4,188 people by 2024. Esri projects that the number of households in the market area will grow by 0.29% every year, adding 1,560 households over the next five years; these with an average a median income of \$158,460.

Table 13. Projected Change in Residential Market Area Households by Income (2019 – 2024)

<u>West Milford Village Center</u>				
Income Category	2019	2024	5-Year Change	Annual Change
<\$15,000	1,022	886	-136	-0.027%
\$15,000 - \$24,999	4,357	3,751	-606	-0.12%
\$25,000 - \$34,999	4,782	4,073	-709	-0.14%
\$35,000 - \$49,999	7,225	6,430	-795	-0.16%
\$50,000 - \$ 74,999	13,812	12,324	-1,488	-0.30%
\$75,000 - \$99,999	14,025	13,181	-844	-0.18%
\$100,000 - \$149,999	23,587	24,005	418	0.04%
\$150,000 - \$199,999	15,406	17,575	2,169	0.38%
\$200,000+	19,018	22,397	3,379	0.60%
Total	103,234	104622	1388	0.27%
Total for Income Groups with Projected Growth			5,966	1.02%

Source: U.S. Census Bureau, Census 2010 Summary File 1 | ESRI forecasts for 2019 and 2024

In Table 13 (above) the net growth of households masks the dynamic change projected in the West Milford Village Center region. If present trends continue over the next five (5) years, the number of households earning less than \$100,000 excluding households earning less than \$15,000 annually would decrease, through out-migration, with increases in household income and inflation pushing some households into the next income category. At the same time, the number of households earning less than \$15,000 and \$100,000 or more per year would increase, by 1.12% per year.

Table 14. Projected Change in Residential Market Area Households by Income (2019 – 2024)

<u>Hewitt Village Center</u>				
Income Category	2019	2024	5-Year Change	Annual Change
<\$15,000	4,210	3,603	-607	-0.12%
\$15,000 - \$24,999	4,533	3,821	-712	-0.14%
\$25,000 - \$34,999	4,641	4,039	-602	-0.12%
\$35,000 - \$49,999	7,555	6,659	-896	-0.18%
\$50,000 - \$ 74,999	13,815	12,336	-1,479	-0.30%
\$75,000 - \$99,999	14,031	13,209	-822	-0.18%
\$100,000 - \$149,999	23,960	24,453	493	0.04%
\$150,000 - \$199,999	15,110	17,794	2,684	0.38%
\$200,000+	19,751	23,252	3,501	0.60%
Total	107,606	109,166	1,560	0.29%
Total for Income Groups with Projected Growth			6,678	1.14%

Source: U.S. Census Bureau, Census 2010 Summary File 1 | ESRI forecasts for 2019 and 2024

The Hewitt Village Center region is similar to the West Milford Village Center residential market area except that all households earning less than \$100,000 would decrease by 2024 (Table 14, above). The number of households earning \$100,000 or more annually would increase by 1.14% which is slightly greater than that of the West Milford Village Center.

Table 15. West Milford Village Center Demographic Comparison

	Village Center Area ¹	Residential Market Area ¹
Total Population	14,173	295,450
Median Age	46.2	44.2
Under 18	3,069 (21.7%)	68,841 (23.3%)
65 and older	2,089 (14.7%)	40,495 (13.7%)
Average Household Size	3.14	3.21
Median Household Income	\$101,237	\$107,035
Median Home Value	\$308,586	\$384,253
Home Ownership Rate	79.6%	76.5%
Vacancy Rate	9.1%	6.6%
Race		
- White Alone	13,030	257,043
- Black Alone	241	8,273
- American Indian Alone	567	887
- Asian Alone	270	14,182
- Pacific Islander Alone	0	0
- Some Other Race Alone	256	7,978
- Two or More Races	298	6,796
- Hispanic, Origin	1,248	32,500
Education		
- No HS diploma	3.6%	3.3%
- Bachelor's degree +	38.2%	43.1%
Households (2010 data)		
- 1-person	1,327	22,982
- With children	1,761	38,223
- Multigenerational	195	195

Sources: ¹ U.S. Census Bureau, Census 2010 Summary File 1

² ESRI Forecasts for 2019 and 2024, ESRI converted Census 2000 data into 2010 geography

The differences in median age among the West Milford Village Center and the residential market area are small. However, the residential market area has slightly a higher proportion of residents under 18 (23.3%) as compared to the Village Center (21.7%). Conversely, the residential market area has a slightly lesser proportion of residents aged 65 years and older than the Village Center. This would suggest that the Village Center Area may benefit from new and enhanced opportunities to make it more attractive for both households with children and households with retirees.

The average household size is fairly similar across the two areas. The median household incomes and median reported home value are higher in the residential market areas. However, the West Milford Village Center has the highest home ownership rate. This may suggest that although the household incomes and home values are less than the residential market area, there is opportunity for the Village Center to acquire new residential development to attract a diverse population of a variety of ages and incomes.

Table 16: Hewitt Village Center Demographic Comparison (2019)

	Village Center Area ¹	Residential Market Area ¹
Total Population	12,829	302,349
Median Age	45.5	43.6
Under 18	2,463 (19%)	65,006 (21.5%)
65 and older	2,271 (17.7%)	54,423 (18%)
Average Household Size	2.50	2.74
Median Household Income	\$90,568	\$107,563
Median Home Value	\$285,754	\$386,444
Home Ownership Rate	74.1%	76.3%
Vacancy Rate	13.0%	6.3%
Race		
- White Alone	11,972	261,230
- Black Alone	205	9,373
- American Indian, Alone	77	908
- Asian Alone	180	14,816
- Pacific Islander Alone	0	0
- Some Other Race Alone	154	9,071
- Two or More Races	205	6,955

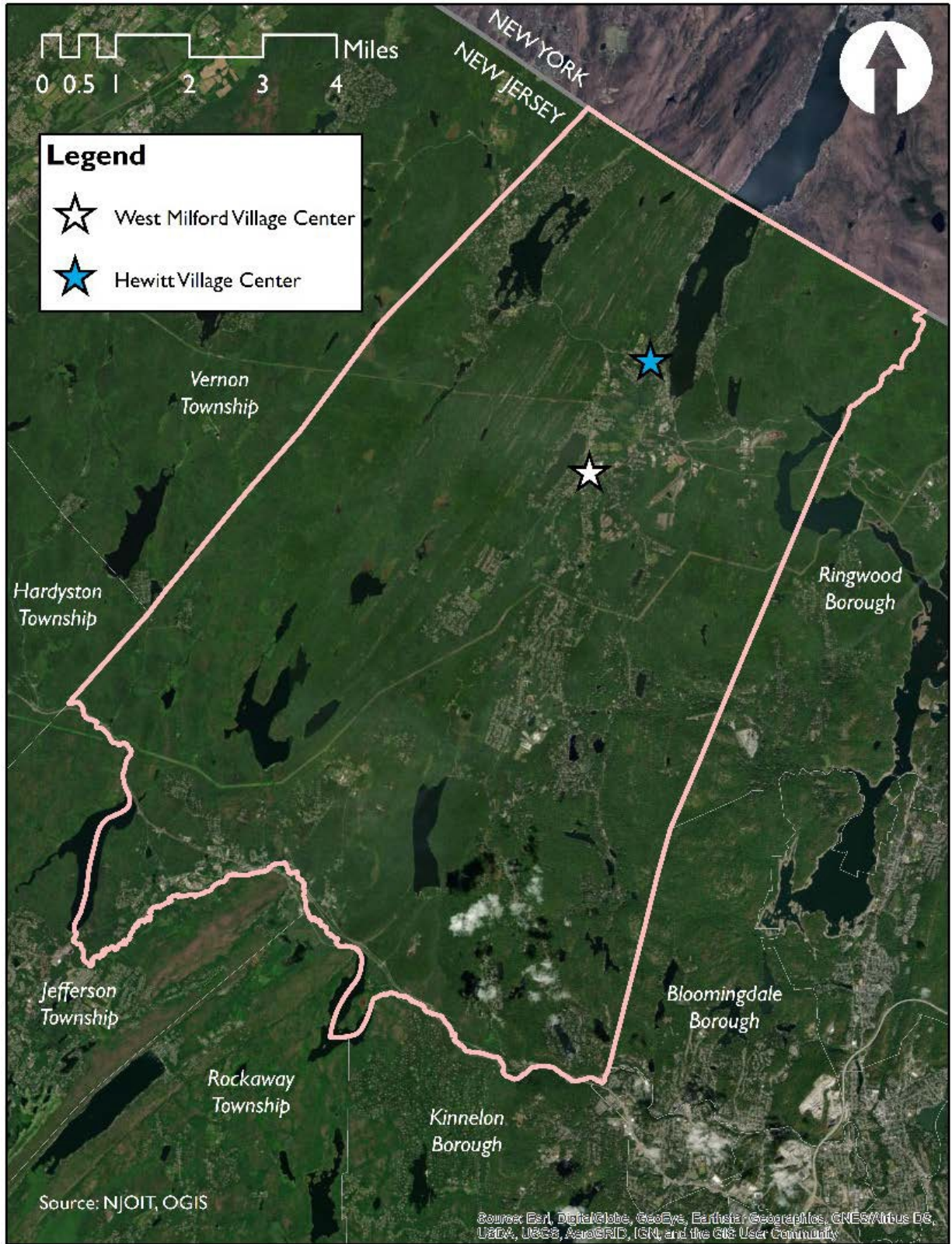
- Hispanic, Origin	806	34,771
<hr/>		
Education		
- No HS diploma	4.7%	3.4%
- Bachelor's degree +	34.3%	46.9%
<hr/>		
Households (2010 data)		
- 1-person	1,399	23,119
- With children	1,582	38,320
- Multigenerational	159	3,695

Sources: ¹ U.S. Census Bureau, Census 2010 Summary File 1
² ESRI Forecasts for 2019 and 2024, ESRI converted Census 2000 data into 2010 geography

The difference in median age between the Hewitt Village Center and its residential market area is small as well. Similar to the West Milford Village Center and residential market area, approximately 40% of residents fall in the under 18 (65,006) and over 65 (54,423) age cohorts. The average household size is similar in both the Village Center and residential market areas. However, the residential market area has a greater median household income of \$107,563 and a median home value of \$386,444. The home ownership rate was also greater in the residential market area. This may suggest that the Hewitt Village Center is primarily a vacation destination with vacant homes during the off seasons as it is near Greenwood Lake, while the residential market area consists of more permanent year-round residents in the surrounding areas. The U.S. Census Bureau defines *vacant* as a housing unit that does not fit into any year-round vacant category. There is still great potential to make the Hewitt Village Center into a prosperous Village Center with more permanent residents of all ages in order to increase the income diversity.

The Township of West Milford, especially the West Milford Village Center and Hewitt Village Center, has higher vacancy rates than the respective residential market area. Most likely, the number of lakes and seasonal homes in the Township drive the difference in vacancy, and possibly, the differences in the home values. West Milford has seen an increase in the number of short-term rentals over the past couple of years between the adoption of a Short-Term Rental Ordinance and the effects on housing and vacations that the Covid-19 Pandemic brought.

Figure 21. Village Centers



The residential market areas are racially and ethnically more diverse than the West Milford Village Center and the Hewitt Village Center, but are relatively homogenous by state and national standards. The two (2) residential market areas have higher numbers of college graduates and residents without a high school diploma, but the Village Centers are similar across the two (2) areas. By national standards, the Village Centers and residential market areas have low numbers of residents without a high school diploma and high numbers of college graduates. All four (4) areas are relatively similar regarding household composition.

For many of these demographic characteristics, the differences are not large enough to suggest that there would be a meaningful difference in housing demand throughout the four (4) areas. Because a large portion of vacant housing units in West Milford are likely seasonal homes, average values in these areas must come under stricter scrutiny as new residential units in the Village Centers have less of a draw on vacation homes than the nearby mountain or lake areas. In addition, the Village Centers' population of under 18 and over 65-year-olds suggests that individual or multi-family developers could attract households composed of young families, downsizing retirees, and multigenerational individuals, provided that there are amenities available to make the Village Centers attractive to such households.

Residential Market Potential

Table 17 estimates the projected total number of owner-occupied, renter-occupied, and vacant housing within the West Milford Village Center residential market area. There is a slight projected increase by 0.2% in owner-occupied housing, a decline in renter occupied housing, and an increase by 0.4% in vacant housing from 2019 to 2024. Perhaps signaling a changing market, these figures follow a slow but steady decrease in owner-occupancy and commensurate increase in renter-occupancy over the previous decade (2000-2019). This growth in owner-occupied housing is attributed to the coinciding projected increase in annual household incomes of \$100,000 or higher per year.

The analysis finds that there is potentially a market for housing units with values of \$400,000 or more. The most noticeable change in owner-occupied housing in the Village Center is housing units with a value between \$500,000 and \$749,999 where there is a 3.3% increase in value of occupied residential dwellings. It is important to note, however, that these rates represent potential, based on past trends. How much of that potential is realized in West Milford Township will depend on a wide variety of factors, but mostly comes down to the supply and attractiveness of places to live in the Township relative to other areas and communities in the residential market area.

Table 17. Projected New Residential Market Area Potential (2019 – 2024)

West Milford Village Center

Housing Unit Summary (2000-2024)

	Total	Owner Occupied	Renter Occupied	Vacant Housing
2000 Housing Units	102,743	80.6%	14.7%	4.6%
2010 Housing Units	111,310	78.8%	15.0%	6.2%
2019 Housing Units	113,737	76.5%	16.9%	6.6%
2024 Housing Units	115,285	76.7%	16.3%	7.0%
Owner Occupied Housing Units by Value		2019	2024	
<\$50,000		1.1%	0.4%	
\$50,000 - \$99,999		0.9%	0.6%	
\$100,000 - \$149,999		2.2%	1.6%	
\$150,000 - \$199,999		5.1%	4.1%	
\$200,000 - \$249,999		8.8%	7.3%	
\$250,000 - \$299,999		11.4%	9.7%	
\$300,000 - \$399,999		24.4%	22.9%	
\$400,000 - \$499,999		16.6%	17.3%	
\$500,000 - \$749,999		18.2%	21.5%	
\$750,000 - \$999,999		6.9%	8.9%	
\$1,000,000 - \$1,499,999		2.8%	3.6%	
\$1,500,000 - \$1,999,999		0.6%	0.7%	
\$2,000,000 +		1.1%	1.4%	
	Total	86,996	88,387	
	Average Home Value	\$333,408	\$467,013	

Sources: 1 U.S. Census Bureau, Census 2010 Summary File
 ESRI Forecasts for 2019 and 2024, ESRI converted Census 2000 data into 2010 geography

The projected trends in owner occupied, renter occupied and vacant housing in the Hewitt Village Center residential market area are displayed in Table 18 below. As in the West Milford Village Center, from 2000 to 2019, there has been a declining rate of owner-occupied housing however, in 2024 the rate of owner-occupied housing units increases slightly by 0.2%. The rate of renter occupied housing decreased by 0.6% from 2019 to 2024 and the rate of housing vacancy is estimated to increase by 0.4%.

The analysis finds that there is a potential market for households with annual incomes of \$100,000 or more. It is important to note that these rates represent potential based on past trends.

Multiple factors may influence the market potential in the Hewitt Village Center, such as the supply and attractiveness of dwellings in the Township compared to other areas and communities in the residential market area. Additionally, the housing market post-COVID 19 pandemic remains unpredictable.

Table 18. Projected New Residential Market Potential (2019 – 2024)

<u>Hewitt Village Center</u>				
Housing Unit Summary (2000-2024)				
	Total	Owner Occupied	Renter Occupied	Vacant Housing
2000 Housing Units	103,622	80.2%	15.4%	4.5%
2010 Housing Units	112,327	78.4%	15.6%	6.0%
2019 Housing Units	115,221	76.3%	17.4%	6.3%
2024 Housing Units	116,982	76.5%	16.8%	6.7%
Owner Occupied Housing Units by Value		2019	2024	
<\$50,000		1.1%	0.5%	
\$50,000 - \$99,999		1.0%	0.6%	
\$100,000 - \$149,999		1.9%	1.4%	
\$150,000 - \$199,999		4.6%	3.7%	
\$200,000 - \$249,999		8.8%	7.2%	
\$250,000 - \$299,999		11.4%	9.7%	
\$300,000 - \$399,999		24.5%	22.9%	
\$400,000 - \$499,999		16.2%	16.9%	
\$500,000 - \$749,999		18.0%	21.3%	
\$750,000 - \$999,999		7.4%	9.5%	
\$1,000,000 - \$1,499,999		3.1%	3.9%	
\$1,500,000 - \$1,999,999		0.7%	0.9%	
\$2,000,000 +		1.3%	1.6%	
Total:		87,864	89,478	
Average Home Value:		\$478,118	\$524,440	

Source: U.S. Census Bureau, Census 2010 Summary File.
 ESRI forecasts for 2019 and 2024, ESRI converted Census 2000 data into 2010 geography.

Village Center Residential Development

Based on the projections discussed above, there is market potential for 1,548 new homeowners in the West Milford Village Center 30-minute drive-time trade area from 2019 to 2024. The residential market area around the Hewitt Village Center indicates a similar outcome to that of the West Milford Village Center residential market area. The figure for the Hewitt Village Center is slightly greater, at 1614. Given the significant overlap in the two market areas, either should be considered representative and it is important to note that the two are not additive.

The projections indicate that new units are likely to have values of \$400,000 and up, being the only owner-occupied valuation categories that are expected to increase in that timeframe. The bulk of these units are anticipated to fall in to the \$400,00 to \$750,000 range. These estimates coincide with the expected increase in households with annual incomes of \$100,000 or higher per year. These income categories are the only ones projected to increase.

The challenge for the Township and for developers will be to provide a product, both at the scale of each Village Centers and of the individual housing unit, that will appeal to these new households. Another challenge will be the lack of developable land as the Township is located within the Preservation Area of the Highlands Region which limits opportunities for new “greenfield” development. To succeed, the Village Centers must provide amenities – such as shopping, dining, and entertainment, as well as attractive architecture and vibrant public spaces – within walking distance of residential areas situated in a pleasant environment. The amenities in the Village Centers may be different in character from one another, as the West Milford Village Center includes the Municipal Complex and shopping areas while the Hewitt Village Center is near Greenwood Lake and available retail locations. Differences between each commercial area are desirable however, as both Village Centers must be competitive in terms of appeal and uniqueness while avoiding significant competition between them for the same market base.

Retail Market Demand

Demand for retail building space is driven by consumer spending. Residents living in proximity to shopping centers and districts provide the majority of the consumer spending that supports the retail businesses in located within them. People working in the area provide some additional spending to support retail businesses. Finally, visitors also spend money that supports shopping centers and districts.

Retail Market Basics

Below is an explanation of terms used in this retail market analysis.

Household Spending

A trade area is the geographic area from which a retail center or district will draw the majority of its customers. Sophisticated market-analysis models for individual retailers

often define primary, secondary, and even tertiary trade areas. It is generally sufficient, however, for an early-stage market analysis to define a single primary trade area. Several factors affect the size and boundaries of the trade area, including the type of shopping center, location of competitive retail facilities, physical barriers, and visibility and access to major roads and highways. In retail analysis for planning purposes, the radial definition of a trade area or a corresponding drive-time is usually sufficient.

Retail Sales Estimate

The Esri spending report also estimates the amount of retail sales at businesses operating in the trading area. The Esri estimates are based on the U.S. Census Bureau's Economic Census and information obtained from proprietary data sources, such as Dunn & Bradstreet and InfoUSA.

Sales Efficiency

Sales efficiency is the average annual sales per square foot of retail businesses. It varies by store type, by individual businesses, and location of a retail chain. This report estimates retail sales efficiency by type of store based on information from Dollars and Cents of Shopping Centers / The SCORE, published by the Urban Land Institute and the International Council of Shopping Centers, annual IOK reports filed by retail corporations with the U.S. Securities and Exchange Commission, and the U.S. Census Bureau's Economic Census.

Calculating Retail Market Demand

The market demand is based on the difference between the amount of consumer spending by trade-area households, workers, and visitors and the amount of trade-area retail business sales. When trade area households, workers and visitors spend more at a particular types of retail stores as a whole, than they spend on the types of stores within the trade area, they are spending money outside of the trade area. This situation is often referred to as retail leakage, or just leakage, and the amount of the difference is the retail opportunity. In the opposite situation, when a trade area's retail businesses are attracting customers from beyond the trade area the difference between sales and spending is often referred to as the retail surplus.

Types of Retail

Retail markets can be categorized into two broad groups: convenience goods and services, and comparison goods. As described in more detail in the following sections, businesses in these two broad categories typically have different location needs and often operate in different types of retail centers and districts. Table 19 describes the types of retail relevant to the West Milford Shopping Center Village Center and the downtown Hewitt Village Center.

Table 19. Types of Shopping Centers

Shopping Center Type	Building Size Range (sq. ft)	Shopping Center Trade Area Radius (in miles)
Convenience	< 30,000	½
Neighborhood	30,000-100,000	1½
Community	100,000-450,000	3-5
Regional	300,000-900,000	8
Superregional	500,000-2 million	12

Source: Michael D. Beyard et al., *Shopping Center Development Handbook 3rd ed.*, Washington D.C.: Urban Land Institute, 1999.

Convenience Goods and Services

Convenience goods and services are those that people need on a regular basis. For these regular purchases, most consumers know where to get what they want and whether their discriminator is price, convenience, or quality. Groceries, medicines, and hair care are typical convenience goods and services. Because convenience goods and services usually have low margins and high sales volumes, convenience retailers located throughout an area, close to concentrations of households. Convenience goods retailers typically operate in convenience-goods centers and neighborhood-scale centers and draw customers from a ½- to 1½- mile radius in suburban areas and twice that in rural areas.

Comparison Goods

Comparison goods are retail items that consumers purchase more infrequently or rarely. For these purchases, consumers tend to compare goods across brands and across retailers. This habit of comparing induces retailers to locate near each other. It also promotes larger-scale retailers who can stock many different brands of similar products. Clothing, electronics and furniture are quintessential comparison goods. Because comparison goods tend to have higher margins and lower sales volumes and because consumers purchase these goods infrequently, comparison goods retailers tend to locate close to major transportation corridors that give access to a greater number of consumers. These businesses locate in community-scale centers and regional-scale centers, and they draw customers from a 3- to 5- mile radius up to an 8- to 12- mile radius in a suburban area and up to twice that in rural areas; consumers may have to drive even further to access regional-sale retailers. According to the 2019 Esri Retail Market Profile for West Milford (2017 data), comparison goods and experience-orientated shopping are the most desired types of retail in the Township.

Eating and Drinking Establishments

Eating and drinking places are a cross between the convenience and comparison types. Sometimes consumers are looking for convenience when buying food away from home. Fast food and limited-service restaurants generally satisfy this convenience demand. Other times, consumers are looking for higher quality and are willing to travel longer distances and pay more for the cuisine they desire. Full-service restaurants usually satisfy this demand.

Experience-Oriented Shopping

A final, hybrid type of retail is experience-oriented shopping, where the experience of the trip is the focus. The experience's value may accrue from socialization with friends, entertainment, or the quality of the place. Downtowns, new town centers, lifestyle centers, and even shopping malls all attempt to create an enjoyable shopping experience through providing a mix of businesses and amenities. Most consumers infrequently invest their time in experimental shopping and are willing to travel further and forego quick and easy access for the value of the experience. Experience-oriented shopping is a destination trip and can draw from a community, regional, or even superregional trade area, even if it does not offer the commensurate amount of retail square footage.

Implications for a Village Center

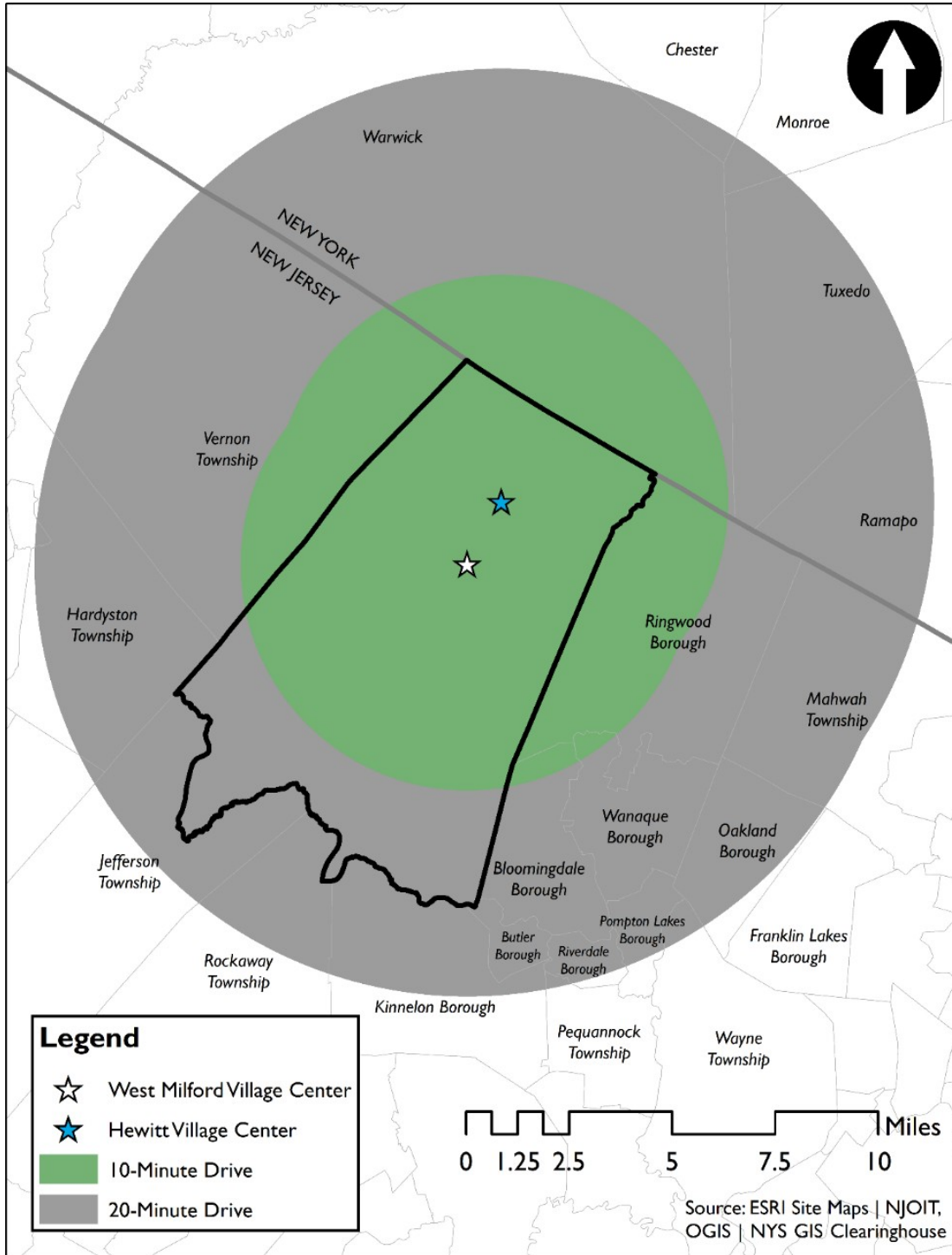
A Village Center, like other traditional main street districts in more rural areas, would likely serve all of the previously described roles. First and foremost, it should be expected to serve as the center for convenience goods and services for households living within a short walk or drive. It does not have enough population within a reasonable drive to support large-scale chain retailers that provide comparison goods. Nevertheless, it should be expected to support smaller-scale independent and boutique businesses that sell comparison goods, such as clothing and accessories. Eating and drinking establishments are a hallmark of a successful downtown, and a Village Center should be expected to provide both convenience restaurants as well as destination restaurants. Most importantly, West Milford Township envisions the Village Center as an experience-oriented shopping district.

Retail Market Potential

This analysis uses a 10-minute drive-time to define the trade area for convenience goods and services. This area is about twice as large as what might be used in a more suburban setting, but it does approximate something of a mid-point between the Village Center and Vernon, Ringwood, Bloomingdale Wanaque and Warwick where there are supermarket-anchored shopping centers, essential convenience goods, and services shopping centers. The analysis uses a 20-minute drive-time to define the trade area for comparison goods, which is not much larger than what would be used in a more suburban context. However, a larger trade area would extend too close to community- and regional-scale centers – such as Harriman Commons, Riverdale Crossing, Sparta

Town Center, and Coppertree Mall – which would overstate the demand for retail businesses in the Village Center.

Figure 22. Convenience Goods and Comparison Goods Trade Areas



The 10-minute drive is approximately 5.5 miles and the 20-minute drive is approximately 10.5 miles from both Village Centers.

Market Potential for Convenience Goods

The market potential for convenience goods and services in the 10-minute drive-time trade area for the West Milford Village Center is shown in Table 20. Supply (retail sales) estimates sales to consumers by establishments; sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments; supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents ‘leakage’ of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales.

The data displays a leakage in food and beverage categories, health and personal care, as well as in gasoline stations. There is significant retail potential for each type of convenience good, in which this gap represents the leakage or missed retail opportunity within the convenience goods trade area. Convenience goods in the West Milford Village Center area could expect to earn a majority of nearby residents’ spending on their goods. The data in Table 20 provides an estimate of the share of residents’ spending that could be reasonable for the West Milford Village Center.

Table 20. Market Potential for Convenience Goods (2017)

<u>West Milford Village Center Trade Area</u>					
Store Type	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	# of Businesses
<i>Food & Beverage</i>					
Restaurants/Other Eating Places	\$25,559,856	\$10,787,522	\$14,772,334	40.6	27
Drinking Places (Alcoholic Beverages)	\$824,483	\$195,982	\$628,501	61.6	1
Alcohol	\$5,276,955	\$2,320,493	\$2,956,462	38.9	3
Health & Personal Care	\$18,414,717	\$16,426,055	\$1,988,662	5.7	5
Gasoline Stations	\$23,382,884	\$9,941,036	\$13,441,848	40.3	2

Source: Esri and Infogroup. Esri 2019 Updated Demographics.

Esri 2017 Retail MarketPlace. Copyright 2019 Esri. Copyright 2017 Infogroup, Inc. All rights reserved

Note: Click link to view the Methodology Statement: <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>

The market potential for convenience goods and services in the 10-minute drive-time trade area for the Hewitt Village Center is shown in Table 21. The data shows that there is a leakage in food and beverage categories, health and personal care, and gasoline stations. There is substantial retail potential for the above-mentioned retail businesses. Convenience goods in the Hewitt Village Center could expect to earn a majority of nearby residents' spending on their goods. Since the West Milford Village Center Trade Area and the Hewitt Village Center Trade Area are within close proximity to each other, the defined trade area overlaps which would cause competition between the different categories. To minimize competition, each Village Center Trade Area should be designed to focus on different categories to minimize competition between them. To optimize the amount of captured leakage in the Village Centers, the food and beverage, health and personal care and gasoline stations categories should be limited through zoning regulations such as overlay zones to control the competition between businesses within the Village Centers and businesses in the trade areas but outside of the Village Centers. Furthermore, the Village Centers should also cater to increasing the overall demand for households earning \$100,000 or more annually in order to create retail diversity.

Table 21. Market Potential for Convenience Goods (2017)

Hewitt Village Center Trade Area

Store Type	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	# of Businesses
<i>Food & Beverage</i>					
Restaurants/ Other Eating Places	\$22,411,773	\$10,142,124	\$12,269,649	37.7	26
Drinking Places (Alcoholic Beverages)	\$798,071	\$448,220	\$349,951	28.1	2
Alcohol	\$4,472,876	\$1,817,916	\$2,654,960	42.2	2
<i>Health & Personal Care</i>	\$16,459,113	\$15,523,850	\$935,263	2.9	4
<i>Gasoline Stations</i>	\$20,879,437	\$9,738,797	\$11,140,640	36.4	2

Source: Esri and Infogroup. Esri 2019 Updated Demographics.
Esri 2017 Retail MarketPlace. Copyright 2019 Esri. Copyright 2017 Infogroup, Inc. All rights reserved.
Note: Click link to view the Methodology Statement: <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>

Market Potential for Comparison Goods

Table 22 depicts the market potential for comparison goods in the 20-minute drive-time trade area for the West Milford Village Center. Households within a 20-minute drive are spending more than businesses in that same area are making in sales, enough to suggest that the area could potentially support the development of retail businesses. The West Milford Village Center makes

up a smaller portion of the comparison goods trade area. The total number of businesses in the trade area, by the type are indicated in Table 22.

Table 22. Market Potential for Comparison Goods (2017), 20 Minutes

West Milford Village Center Trade Area

Store Type	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/ Surplus Factor	Number of Businesses
<i>Furniture & Home Furnishings</i>	\$52,825,903	\$12,105,952	\$40,719,951	62.7	17
<i>Electronics and Appliances</i>	\$51,824,066	\$25,603,059	\$26,221,007	33.9	17
<i>Building Materials, Garden Equip. & Supply</i>	\$87,159,701	\$59,403,298	\$27,756,403	18.9	47
Bldg. Material & Supplies Dealers	\$79,477,379	\$53,995,247	\$25,482,132	19.1	37
Lawn & Garden – Equipment and Supply	\$7,682,322	\$5,408,051	\$2,274,271	17.4	10
<i>Clothing & Accessories</i>	\$102,348,676	\$17,919,830	\$84,428,846	70.2	32
Clothing Stores	\$71,444,009	\$12,209,196	\$59,234,813	70.8	22
Shoes Stores	\$12,540,559	\$2,095,852	\$10,444,977	71.4	2
Jewelry, Luggage & Leather Goods	\$18,364,108	\$3,615,052	\$14,749,056	67.1	9
<i>Sporting Goods, Hobby, Books & Music</i>	\$40,159,306	\$10,363,269	\$30,156,037	59.3	24
Sporting Goods/Hobby/Musical Instr.	\$34,621,714	\$9,461,077	\$25,160,637	57.1	19
Book, Periodical & Music	\$5,897,592	\$902,192	\$4,995,400	73.5	5
<i>General Merchandise</i>	\$189,607,559	\$24,872,877	\$164,764,682	76.8	15
Department Stores Excluding Leased Depts.	\$115,916,183	\$13,776,659	\$102,139,524	78.8	1
Other General Merchandise	\$73,691,375	\$11,096,218	\$62,595,157	73.8	14
<i>Miscellaneous Retailers</i>	\$50,409,135	\$26,109,961	\$24,299,174	31.8	75
Florists	\$4,185,811	\$2,629,332	\$1,556,479	22.8	11
Office Supplies, Stationary & Gift	\$14,287,280	\$5,336,164	\$8,951,116	45.6	17
Used Merchandise	\$3,682,820	\$1,994,728	\$1,688,092	29.7	14
Other / Miscellaneous	\$28,253,224	\$16,149,737	\$12,103,487	27.3	32
<i>Food Services & Drinking Places</i>	\$143,044,560	\$89,152,192	\$53,892,368	23.2	239
Special Food Services	\$4,301,217	\$2,965,112	\$1,336,105	18.4	9
Drinking Places (Alcoholic Beverages)	\$5,055,675	\$4,437,360	\$618,315	6.5	15
Restaurants/Other Eating Places	\$133,687,668	\$81,749,719	\$51,937,949	24.1	214

Source: Esri and Infogroup. Esri 2019 Updated Demographics.

Esri 2017 Retail MarketPlace. Copyright 2019 Esri. Copyright 2017 Infogroup, Inc. All rights reserved.

Note: Click link to view the Methodology Statement: <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>

Table 23 demonstrates the market potential for comparison goods in the 20-minute drive-time trade area for the Hewitt Village Center for household spending only. Households within a 20-minute drive are spending more by category than corresponding businesses in that same area are making in sales, which suggests that the area could support the development of retail businesses as well. The Hewitt Village Center makes up a smaller portion of the comparison goods trade area, due to the number of businesses in the trade area, as indicated in Table 23. The number of businesses in the Hewitt Village Center trade area is similar to the amount seen in the West Milford Village Center trade area.

Table 23. Market Potential for Comparison Goods (2017), 20 Minutes

<i>Hewitt Village Center Trade Area</i>					
Store Type	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/ Surplus Factor	Number of Businesses
<i>Furniture & Home Furnishings</i>	\$52,825,903	\$12,105,952	\$40,719,951	62.7	17
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<i>Sporting Goods, Hobby, Books & Music</i>	\$40,159,306	\$10,363,269	\$30,156,037	59.3	24
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<i>General Merchandise</i>	\$189,607,559	\$24,872,877	\$164,764,682	76.8	15
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Restaurants/Other Eating Places	\$133,687,668	\$81,749,719	\$51,937,949	24.1	214

Source: Esri and Infogroup. Esri 2019 Updated Demographics.

Esri 2017 Retail MarketPlace. Copyright 2019 Esri. Copyright 2017 Infogroup, Inc. All rights reserved.

Note: Click link to view the Methodology Statement: <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>

Tourism and Market Demand Potential

West Milford Township is located entirely within the Preservation Area of the Highlands Region. The Township Planning Board adopted the Highlands Master Plan Element at a public hearing on September 27, 2012. In November, the Township's Environmental Commission completed its review of the Highlands Environmental Resource Inventory (ERI), memorializing their findings in a Resolution adopted on November 26, 2012. An ERI identifies and depicts the natural and cultural resources present in a community. Natural resources maps and accompanying narrative provide the basis for inventorying a community's natural resource components and provide the base source for resource conservation. Identifying a community's natural resources is the first step toward establishing mechanisms for their protection. As a crucial component of a master plan, an ERI functions as the basis for development of natural resources protection ordinance.

The purpose of the Highlands ERI is to provide a framework that supports the efforts of West Milford Township and to bring its planning documents, including the ERI, into conformance with the Highlands Regional Master Plan (RMP). The ERI provides critical support to the Conservation Plan Element of the municipal master plan related to implementation of resource protection requirements in the land use ordinance and health codes of West Milford Township.

The Township conducted a Master Plan Reexamination Report on March 7, 2013 with "eco-tourism" being one of the highlighted elements that should be implemented. The Master Plan Reexamination Report emphasized the importance of pursuing such opportunities to develop eco-tourism with a focus on boating, hiking and equestrian trails, water sports and fishing. An overview of existing eco-tourism activities available in the West Milford and Hewitt Village Center areas offers insight into eco-tourism activities that are enjoyed most by residents and visitors, as well as activities that lack participation and should be considered for improvements in order to further enhance the tourism industry of the Township.

Types of Eco-Tourism

Eco-tourism is about uniting conservation, communities, and sustainable travel. This means that those who implement, participate in, and market ecotourism activities should adopt the following principles:

1. Minimize negative physical, social, behavioral, and psychological impacts.
2. Build environmental and cultural awareness and respect.
3. Provide positive experiences for both visitors and hosts.
4. Provide direct financial benefits for conservation.
5. Generate financial benefits for both local people and private industry.
6. Deliver memorable interpretative experiences to visitors that help raise sensitivity to host countries' environmental and social climates.

7. Design, construct, and operate low-impact facilities.

There are three (3) types of eco-tourism that West Milford Township could benefit from which include the following:

1. **Agritourism** attracts tourists and volunteers to explore rural culture and agricultural life in rural communities first-hand, this generating interest in and helping to sustain the agricultural business community. The goal essentially is to improve the economic development of small farms and the rural communities in which they are located. Visitors can participate in agricultural work alongside farmers, participate in growing and harvest related festivals and experiences, and shop from local farmers' produce stands. Bringing such tourism to rural areas contributes to retention of the agricultural industry and has the potential to enhance the economies of rural communities.
2. **Eco-lodging** is an accommodation venue for tourists, built with minimum impact on the surrounding natural environment. It is built to meet particular standards for alternative, sustainable means of water acquisition and careful waste disposal. It utilizes alternative, passive energy consumption designs to limit its impact on the surrounding natural and cultural environment. Often eco-lodge owners offer tours to familiarize visitors with the areas and instill a sense of respect for the historical context of the area, people, and environment.
3. **Eco-trekking** is designed to increase a tourist's awareness about the natural and cultural environmental of a particular region. Visitors learn about local threats to the environment and habitats as well as current preservation techniques. Eco-treks can often be arranged by for-profit organizations and activities can include rock climbing, caving, hiking, bird-watching and nature walks.

Other Tourism Opportunities

1. Cultural Heritage Tourism involves visiting places that are significant to the past or present cultural identity of a particular group of people. Cultural heritage tourism provides an opportunity for people to experience their culture in depth, whether by visiting attractions, historical or culturally relevant places, or by taking part in cultural activities. The National Trust for Historic Preservation defines cultural heritage tourism as "travel to experience the places, artifacts and activities that authentically represent the stories and people of the past and present, including cultural historic and natural resources." Travelers who are interested in cultural heritage tourism would visit or take part in the any of the following:
 - a. Historical attractions, monuments or landmarks;
 - b. Museums, art galleries or theaters;
 - c. Festivals, concerts or performances; and/or

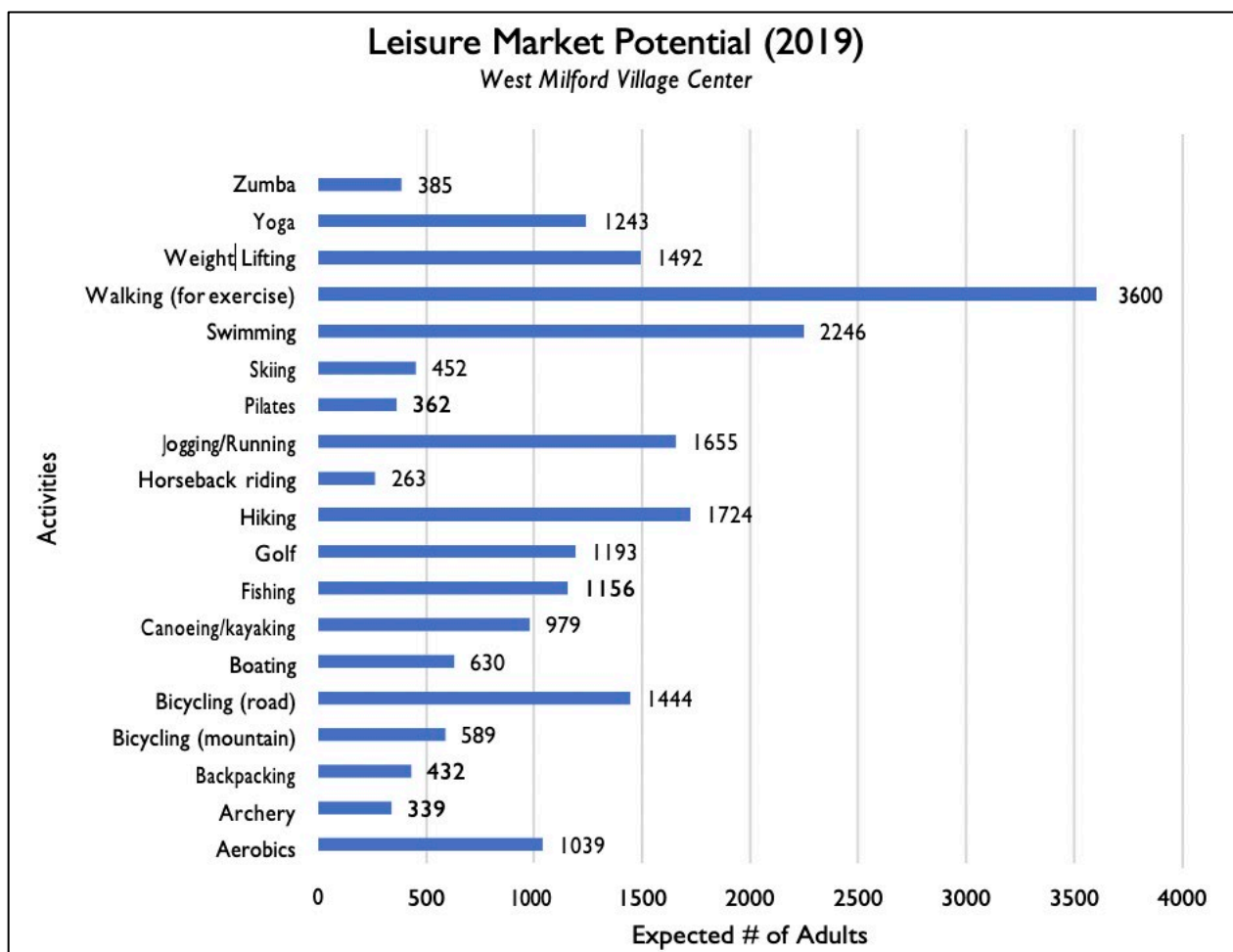
d. Culturally significant neighborhoods or communities.

The West Milford Museum and Heritage Committee are both actively striving to create a comprehensive overview of all of West Milford’s many historical and cultural sites of interest.

West Milford Village Center Tourism Market Potential

Figure 23 depicts the current leisure trends in the Village Center that supports eco-tourism within a 10-minute drive-time trade area. The data shows that activities with the least expenses tend to have a higher participation rate than activities that require additional spending for special equipment. Activities that revolve around achieving a healthy and active lifestyle prove to be the most popular among residents and tourists. However, activities that saw less than 1,000 adult participants annually can be seen as areas of opportunity to encourage increased participation. The scenic nature of the Village Center offers a varied range of activities, which will allow for a diverse tourism industry while conserving the natural beauty of West Milford Township.

Figure 23. Leisure Market Potential



Source: Esri and Infogroup. Esri 2019 Updated Demographics.
Esri 2017 Retail MarketPlace. Copyright 2017 Infogroup, Inc. All rights reserved.

Hewitt Village Center Tourism Market Potential

Figure 24 displays the tourism market potential for the Hewitt Village Center within the 10-minute trade area. In comparison with the West Milford Village Center, Hewitt experienced a lower rate of participation annually except for a few categories, in which the level of participation either remained the same or was slightly greater. Nonetheless, activities such as walking, swimming, jogging and hiking remain the top activities within the area since the Village Center has access to Greenwood Lake as well as nearby hiking trails. There is still room for growth for activities seeing fewer than 1,000 adult participants annually. Businesses such as water and/or land tours, or educational opportunities that incorporate cultural heritage tourism or similar can be encouraged to entice more adults to participate in activities lacking involvement. A surge in eco-tourism will greatly benefit the Village Center community through the introduction of different types of travelers as well as providing other sources of income to bolster the eco-tourism economy.

Figure 24. Leisure Market Potential



Source: Esri and Infogroup. Esri 2019 Updated Demographics.
Esri 2017 Retail MarketPlace. Copyright 2017 Infogroup, Inc. All rights reserved.

Areas to Study for Infill and Revitalization

One of the goals of this plan is to identify areas to study as potential areas in need of revitalization. High concentrations of residential development, proximity to historical and cultural resources, and proximity to open space should be the primary areas of focus.

Town Center

Figure 25. West Milford Village Center / Town Center Redevelopment



The Town Center of West Milford provides opportunities for potential infill and redevelopment. Situated geographically in the middle of the Township, this area of Union Valley Road and Marshall Hill Road that is surrounded by dense residential development and historic areas of interest, would provide many residents and visitors access to various amenities. With Pinecliff Lake in close proximity, creating a walkable and pedestrian-friendly infrastructure system within these boundaries would draw in a variety of businesses. See Appendix C for a list of these parcels.

Hewitt Village Center

Figure 26. Hewitt Village Center Redevelopment

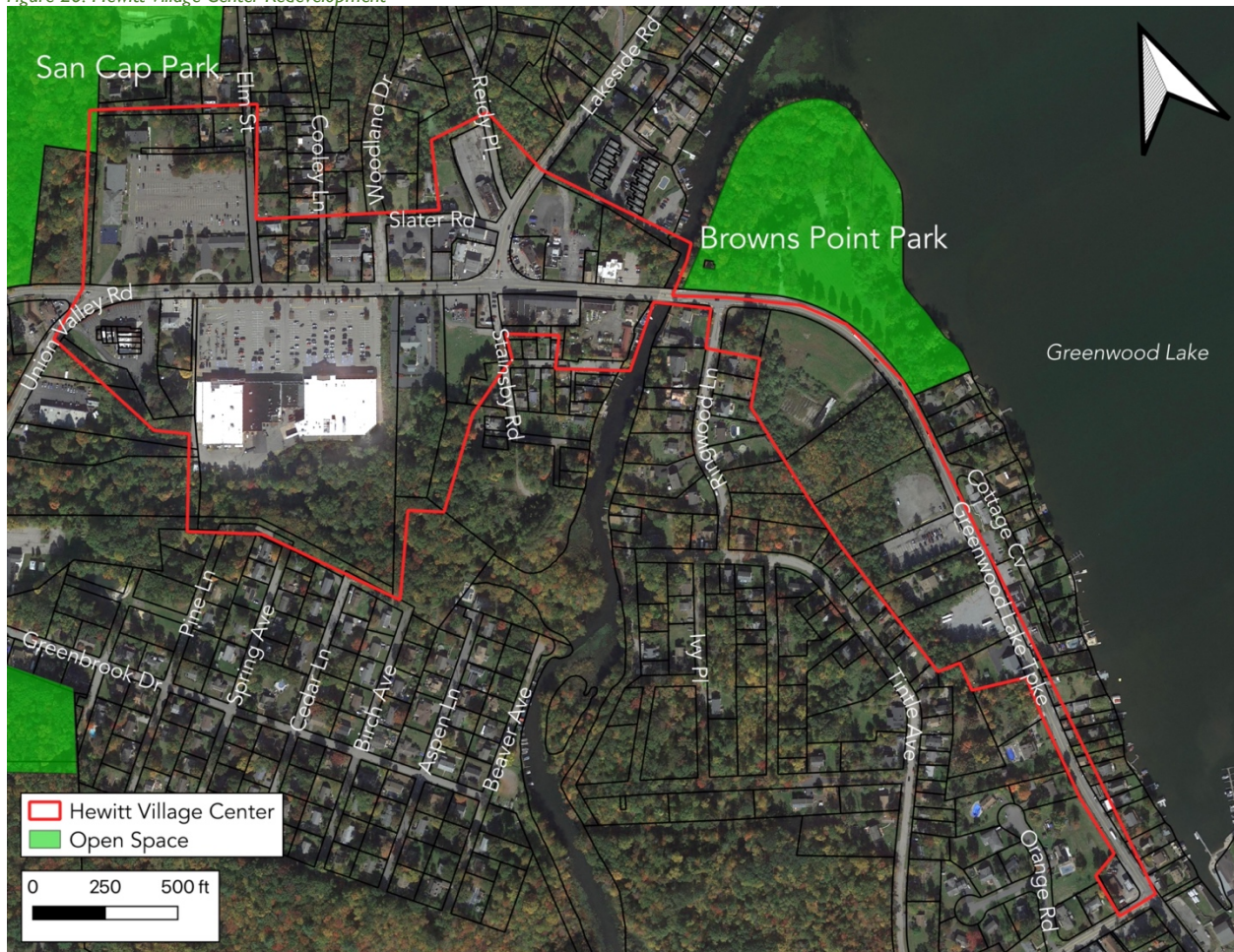


Figure 27. Brown's Point



The Hewitt Village Center on Greenwood Lake Turnpike is surrounded by three open space areas (San Cap Park, Brown's Point, and the Hope Forest Reserve). The historic former McDonald House site is also in close proximity. The redevelopment of this area and revitalization of Brown's Point Park (left) would draw in new businesses and fill vacant storefronts. The Hewitt Village Center is also located next to Greenwood Lake. The number of existing buildings, proximity to historic and cultural resources, and recreation opportunities warrants exploring these sites for redevelopment opportunities.

The Township should keep in mind the overarching goal of connectivity in these locations. Figure 28, below, illustrates the potential for a Town Center Loop, also discussed in the 2021 Open Space and Recreation Plan Update. By connecting these commercial centers and promoting a

sustainable business environment, the Township would be opening access to multiple historic properties and open space and recreation opportunities.

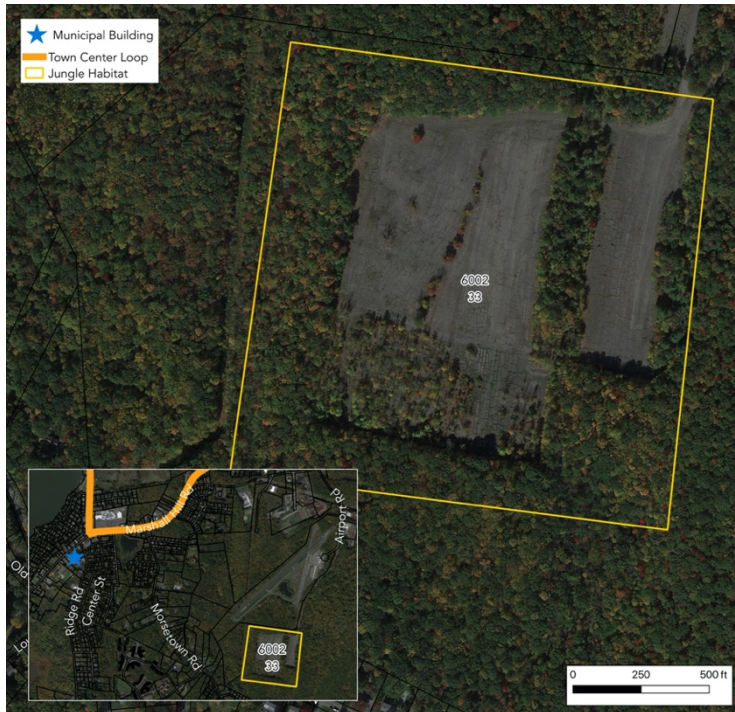
Figure 28. Town Center Loop



During the public outreach process, The Friends of Wallisch Homestead and the Heritage Committee both expressed interest in acting as a historic and heritage site “hub,” where visitors can stop and learn about all of the historic and cultural sites West Milford has to offer. With Wallisch Homestead and the West Milford Museum’s location right in the Town Center and the proposed Town Center Loop, establishing an easy-to-navigate historic site wayfinding system would be invaluable to tourists seeking to learn about the Township’s history.

Jungle Habitat

Figure 29. Jungle Habitat



Formerly the site of Jungle Habitat, Block 6002, Lot 33 is located in the center of the Township and accessed by Airport Road. This property is owned by the State of New Jersey Department of Environmental Protection. Although disconnected from much of the Township, the site is relatively close to the Town Center Loop and the Municipal Building. The site is developed with a deteriorating parking lot. This site, once revitalized, potentially presents the opportunity for a range of events: community days with various vendors and events, outdoor exercise and fitness, pop-up shops, and the like.

Route 23 Corridor

Though not a Village Center, the Route 23 Corridor (Figure 30) is a gateway into the Township; it is often the first and last view of the Township that tourists see when traveling into and out of the Township.



Figure 30. Route 23 Corridor Redevelopment

Many of the buildings in the area are dated or vacant. Revitalized storefronts, adaptive reuse, small pocket parks, or other public spaces would serve as destinations for both residents and tourists along Route 23.



Figure 31. Block 16606, Lot 1. Source: Google Maps



Figure 32. Block 16001, Lot 7. Source: Google Maps

Findings and Recommendations

The Sustainable Economic Development Plan provides strategies for strengthening the local economy and in turn, contribute to the regional economy while taking careful advantage of the unique and valuable built and natural resources of the Township. Information received from stakeholder meetings and surveys was used to formulate these goals.

Residents generally consider West Milford to be an ideal location for a unique mix of commercial activity, recreation, and vast natural resources and scenery. One of the most frequently recurring themes in feedback from residents is the sense of community that West Milford has to offer. Residents and business owners form meaningful relationships over the course of doing business together and in turn this creates a loyal customer base. Residents have a strong desire to shop locally. Residents also enjoy being outdoors whenever given the opportunity, especially in the form of community days such as the Autumn Lights Festival and recreational and creative activities that bring people together.

However, the lack of diversity that the Township's commercial districts has to offer is an issue for residents. Residents have a desire to support local businesses, but at the same time are going to neighboring municipalities for the diversity in retail that they have to offer. In the Economic Development Commission's research, in addition to the surveys distributed for this report, residents came up with over 200 ideas for diversifying retail in the Township, many emphasizing the desire to shop locally.

Business owners have a desire to conduct business in the Township for a multitude of reasons: the sense of community, loyal customer base, distance to home, and the natural scenery. The permitting process and high taxes are the most cited deterrents for starting and growing a business in the Township. Solutions to both of these issues warrant further research and acknowledgement by the Township.

Township officials, residents, business owners, and visitors all agree that West Milford has the unique opportunity to become a year-round tourist destination. Agritourism, eco-lodging, and eco-trekking were mentioned by nearly all stakeholders that were engaged in the public outreach portion of this project and are viable options according to the market analysis section. The Heritage Committee, specifically, is taking initiatives to expand the Township's cultural tourism sector by pursuing a comprehensive trail map and increasing wayfinding to areas of importance.

In order to accomplish the established goals, the report concludes with recommendations for actions the Township should take. These should be used as a starting point for implementation, referring back to the Goals and Objectives of this Plan to continue identify further implementation strategies.

Recommendations

Coordinate between Township entities on overlapping goals and issues. Designate one person or a team to champion each project or initiative to ensure objectives are completed, goals are met, and status updates are given.

Pursue grants to create walkable, pedestrian-friendly commercial centers in strategic locations such as the Village Centers while keeping in mind the overarching goal of connectivity throughout the entire Township. Each completed portion should be advertised to illustrate the Township's commitment and draw in potential developers and redevelopers.

Encourage redevelopment in underutilized areas such as the Hewitt Village Center, Town Center, and Route 23 Corridor. Keep in mind that residents and businesses owners have indicated a lack of diversity in comparison goods and try to draw in a wide array of businesses.

Implement a comprehensive wayfinding system, identifying historic and cultural sites of interest, trails, recreation opportunities, resting areas, and food and beverage options.

Advertise community events, new businesses, and planning milestones as they occur on the Township's local cable station and social media pages.

Refer to the 2021 Open Space and Recreation Plan Update and the 2014 Trails Master Plan to serve as guides for implementing or improving recreation opportunities.

Goal 1: Prioritize Year-Round Recreation

Goal 2: Increase Connectivity

Goal 3: Improve Business Environment

Goal 4: Address Underutilized Sites

Goal 5: Increase communication between Township Agencies and between the Township and Businesses

Goal	Action Item	Priority	Timeframe			Cost Estimate	Success Indicators	Funding	Responsibility
			0-2 Years	3-5 Years	6+ Years				
1, 4	Develop and maintain an inventory of vacant open spaces going unused	Medium	Ongoing			Low	Accessible list of open and unused spaces.		Township
1	Create comprehensive recreation website for residents and visitors	Medium	Ongoing			Low-Medium	Accessible and updated website.		Township
1, 2	Create and make accessible trail map	Medium				Low-Medium	Accessible trail map.		Heritage Committee, EDC
1	Create year-round events <i>Sub-Action Item: Weekly / monthly road closures for jogging, walking, biking</i>	High							Township, EDC
	<i>Sub-Action Item: West Milford Heritage Day</i>	Low				Low	More foot traffic		EDC
		Low	Ongoing					Sponsorships from local businesses	Heritage Committee
1	Work with Wawayanda State Park and Ringwood State Park to identify educational opportunities	Low	Ongoing			Low	Education courses on local history, natural resources, and heritage	VisitNJ Cooperative Marketing Grants	Township, State Parks
1	Encourage winter recreation opportunities at Greenwood Lake	Medium				Low			Township, Local Recreation Businesses
2	Create a contiguous system of open space and trails <i>Sub-Action Item: Identify potential acquisition sites for completing the system</i>	High				Medium-high	Walkability between open spaces and commercial areas.		Township
		Medium						NJ Green Acres Program	
3	Establish a dedicated Business Liaison <i>Sub-Action Item: Create a user-friendly and accessible guide to the business permitting process</i>	High				Low	Number of participating businesses.		EDC, Township
	<i>Sub-Action Item: Create events catered around promoting local businesses</i>	High				Low			
		High	Ongoing			Medium			
3	Reach out to neighboring communities (Warwick, Vernon, and Ringwood) to create cross-marketing strategies	Medium	Ongoing			Low-Medium		VisitNJ Cooperative Marketing Grants	Township

Goal	Action Item	Priority	Timeframe			Cost Estimate	Success Indicators	Funding	Responsibility
			0-2 Years	3-5 Years	6+ Years				
3	Encourage local businesses to participate in online services (online order and curbside pickup, etc.)	High				Low	Number of participating businesses.		Local Businesses
4	Advertise and encourage local or regional businesses to rent underutilized spaces regularly for pop-up shops and events.	Low	Ongoing			Low	Less unused space throughout the year.	Highlands Redevelopment Area Planning	EDC
5	Create a means of consistent communication between Township Committees, Commissions, and Boards	High	Ongoing			Low	More clarity regarding ongoing issues, events, and initiatives		Township
	<i>Sub-Action Item: Establish a Township Liaison; someone to communicate consistently.</i>	High				Low			Township
	<i>Sub-Action Item: Monthly (or weekly) Commission / Council / Committee / Board Report to briefly provide updates on current events, new / revised ordinances, issues, and concerns that uniquely pertain to each entity.</i>	High	Ongoing			Low			Township

Some of these items may also be eligible for the Highlands Environmental and Economic Sustainability Grant Awards Program:

https://www.state.nj.us/njhighlands/grantprograms/plan_conformance/eesgrant.pdf

Appendices

Appendix A: Highlands Resource Inventory

Appendix B: Surveys

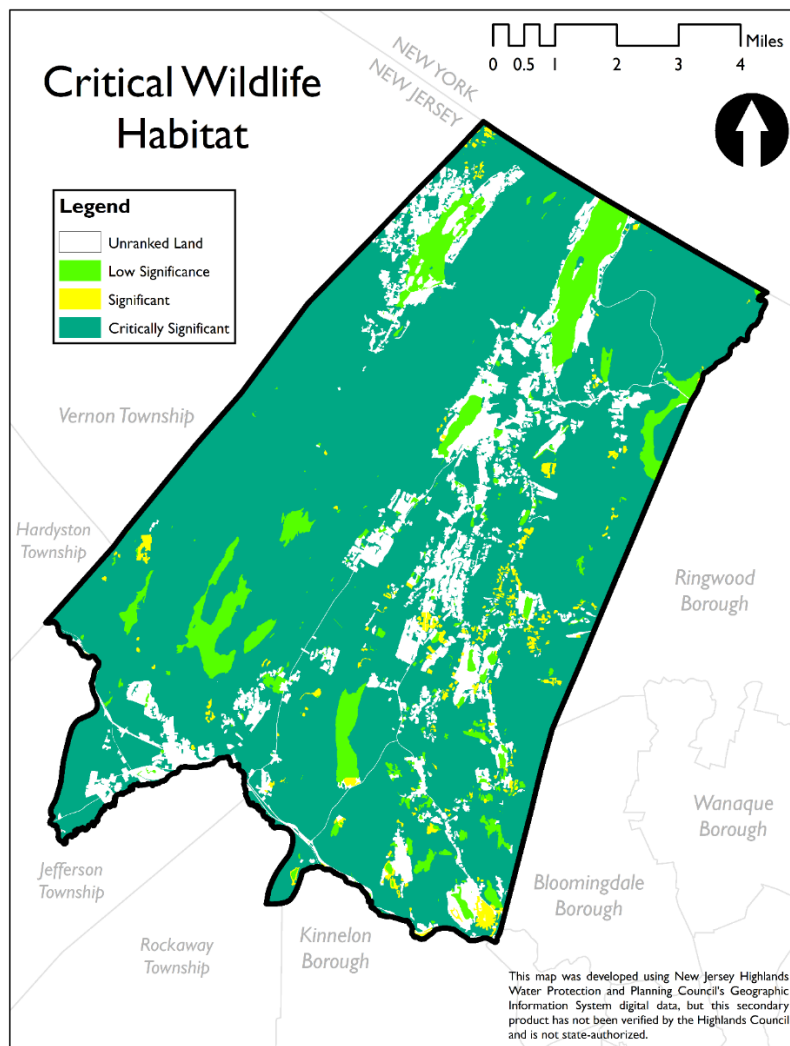
Appendix C: Commercial Properties

Appendix A: Highlands Resource Inventory

The Township of West Milford is located entirely within the Highlands Preservation Area, meaning the land has an exceptional natural resource value and conformance to the Highlands Regional Master Plan is mandatory. As part of the process of planning for sustainable economic development, it is essential to take into consideration the many natural resources in the area.

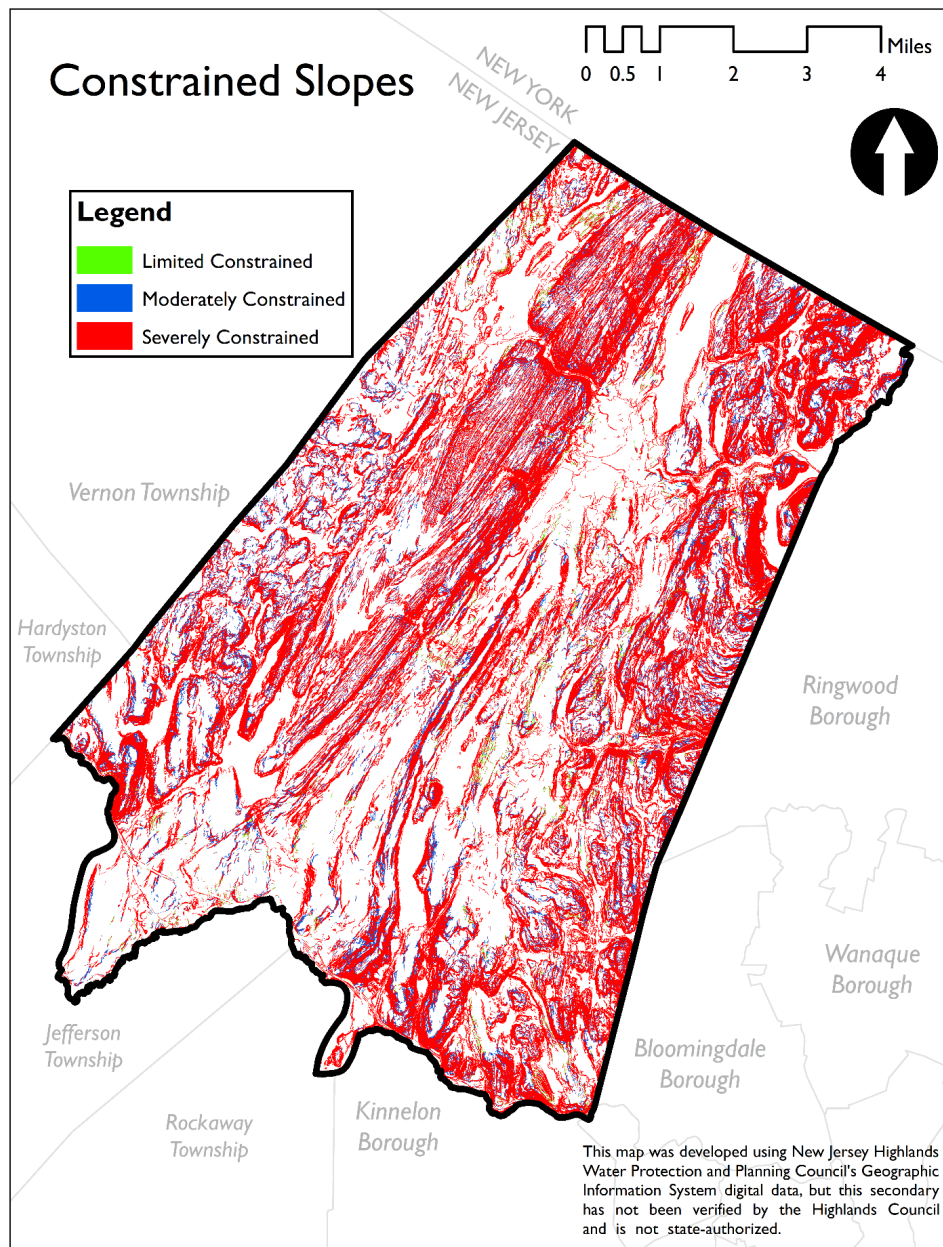
Critical Wildlife Habitat

Throughout West Milford's 51,848 acres, approximately 45,527 acres are assigned a Highlands Conservation Rank of 1 through 3; 1 indicating a low significance in the habitat's role for certain species and 3 being critically significant for the existence of a species. As shown below, the majority of land in West Milford (79.41%) is ranked as critically significant. This is crucial to keep in mind as the Township plans for development of economic opportunities.



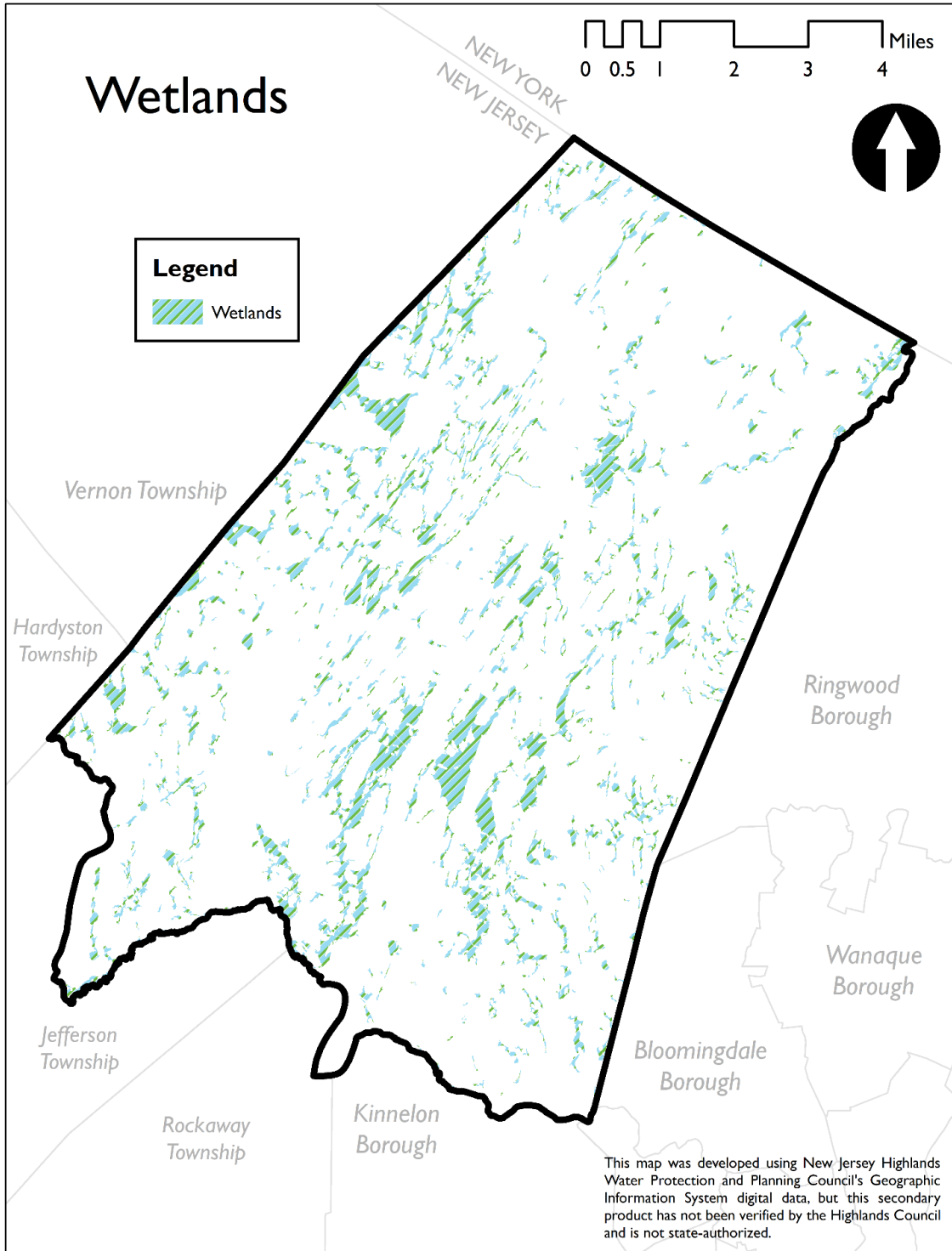
Constrained Slopes

In addition to critical wildlife habitats, it should be noted that there are steep slopes throughout the Township. As illustrated below, severely constrained slopes are prominent throughout West Milford. Steep slopes are often home to rare plant and animal species and provide opportunities for unique recreational activities. Limited constrained slopes consist of all non-Riparian Area lands that have a slope of 15% to less than 20% which are non-forested, are not highly susceptible to erosion, and do not have a shallow depth to bedrock or a Soil Capability Class indicative of wet or stony soils. Moderately constrained slopes are forested lands with 15% to less than 20% slopes. Severely constrained slopes are all lands with 20% or greater slopes and Riparian Area lands with slopes of 10% and greater.



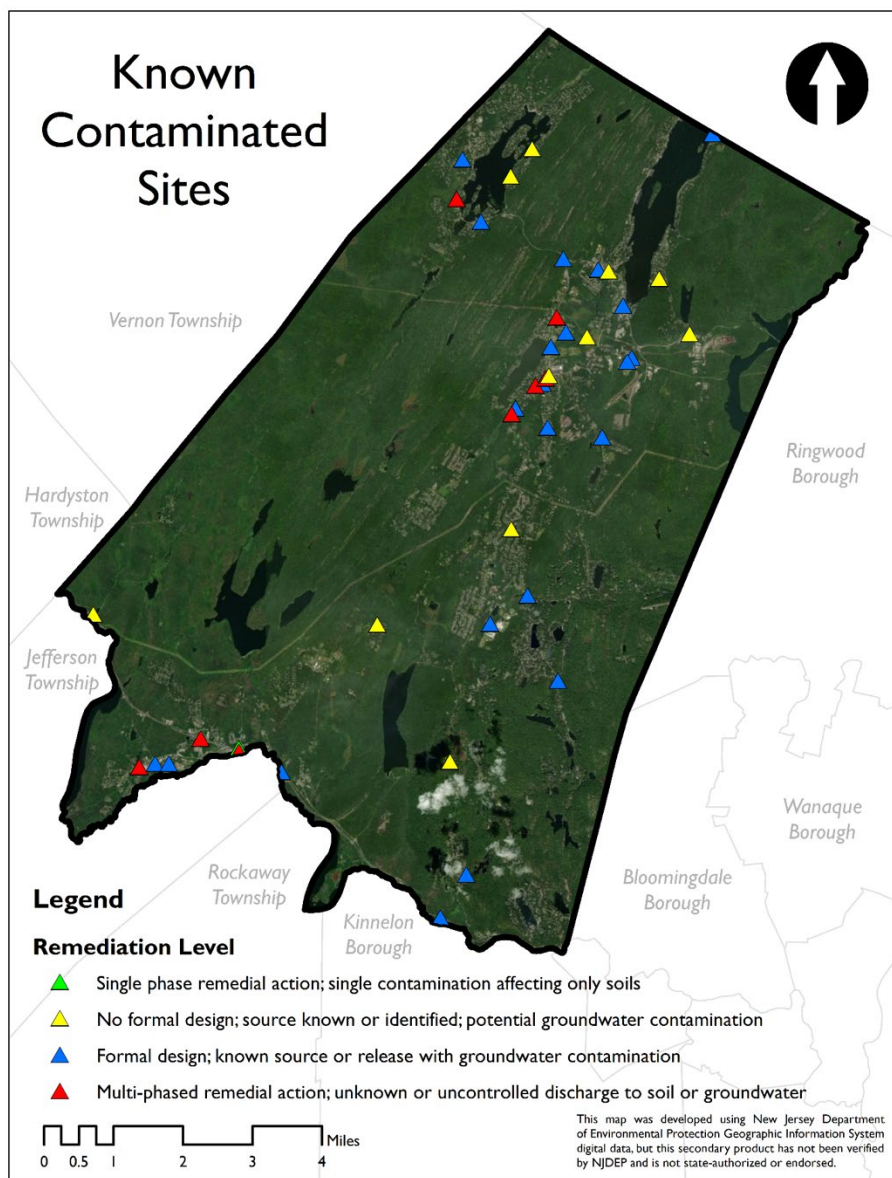
Wetlands

Wetlands are present throughout the Township, comprising of just over 5,000 acres, or 10.33%, of the total acreage in West Milford.



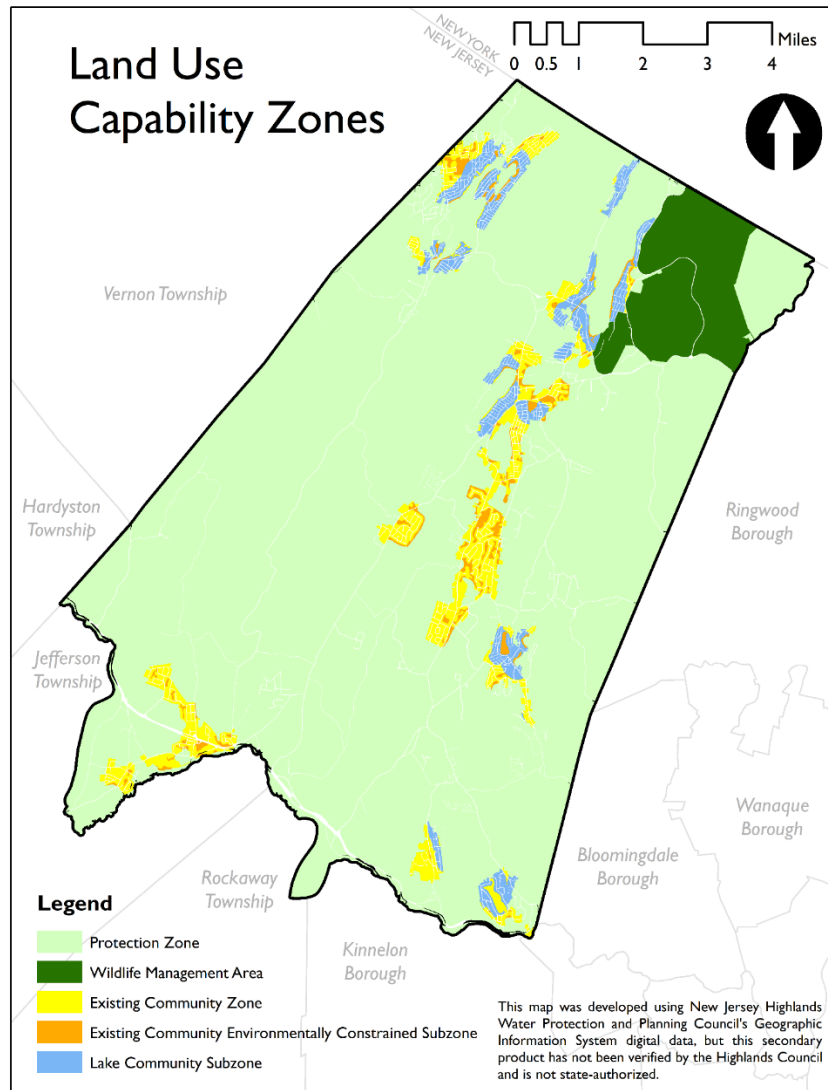
Known Contaminated Sites

There are 20 Tier I Known Contaminated Sites in West Milford, according to the New Jersey Department of Environmental Protection. These sites are located primarily in clusters around developed areas, particularly in the northeast and southwest areas, as shown below. There is also a cluster of Known Contaminated Sites near Upper Greenwood Lake. Most of the sites in the Township fall under Remedial Level C2, meaning they are one of the slightly more complex sites. C2 sites have a formal engineering design phase but because the source is known and identified, they have shorter remedial durations. C1 sites, the next biggest category in West Milford, have an identified source and do not have a formal engineering design. C3 sites, of which there are 8 throughout the Township, include multi-phased remedial actions that are responses to an unknown or uncontrolled source. The timeline for remediation is unclear for these sites.



Land Use Capability Zones

The Highlands Regional Master Plan (RMP) assigns overlay zones to areas within the region. These designations indicate where and how development initiatives may occur based on the ability of areas to accommodate growth. West Milford primarily consists of the Protection Zone designation (43,675.51 acres), which is the most limiting designation in terms of development opportunities. Any development that does occur is subject to strict, environmentally-conscious limitations. Areas within the Wildlife Management Sub-Zone (2,716.72 acres) are managed by the New Jersey Department of Environmental Protection Division of Fish & Wildlife's Bureau of Land Management. Conservation Zone – Environmentally Constrained Sub-Zone lands (485.38 acres) are restricted through limitations on the extension or creation of water supply and wastewater services. The Existing Community Zone signifies areas with concentrated development and thus have fewer environmental constraints in order to preserve the character of the community. Finally, the Lake Community Sub-Zone (1,266.65 acres) consists of Existing Community Zone areas that are within 1,000 feet of lakes.



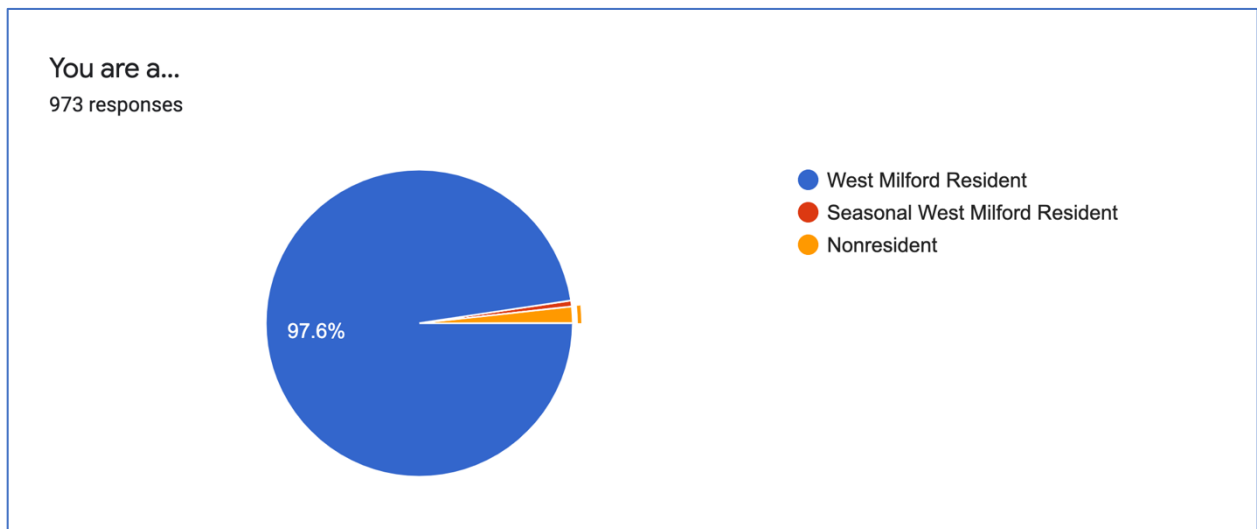
Appendix B: Surveys

Two surveys were distributed by Township officials, on Township websites, through postcards, and by affiliated groups. The first survey was designed for individuals who patronize businesses within West Milford, where the second survey was designed to gain insight from individuals that own businesses located within the Township.

Customer Survey

The Customer Survey received a total of 978 responses, about 3.7% of the total population of West Milford. Below is a discussion of the questions on the survey and the responses.

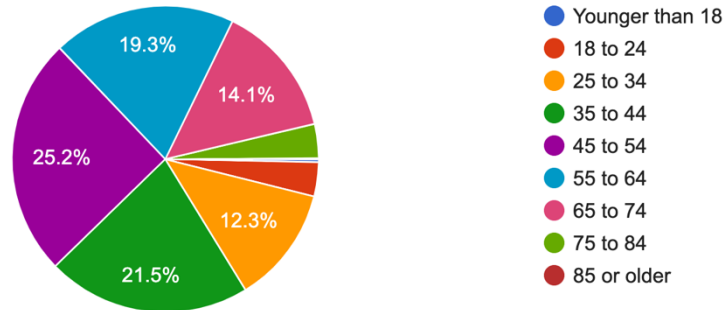
Question #1 asked survey-takers about their residency. 97.6% are a resident of the Township, 1.7% reside outside of the Township, and 0.6% are seasonal West Milford residents.



Question #2 asked respondents about their age. Most respondents are between 45 to 54 years old (25.2%), though the following age groups also had significant numbers of respondents: 35 to 44 years old (21.5%), 55 to 64 years old (19.3%), 65 to 74 years old (14.1%), and 25 to 34 years old (12.3%). Those aged 18 to 24 comprised 3.6% of the respondents and those aged 75 to 84 comprised 3.6% of the respondents.

What is your age?

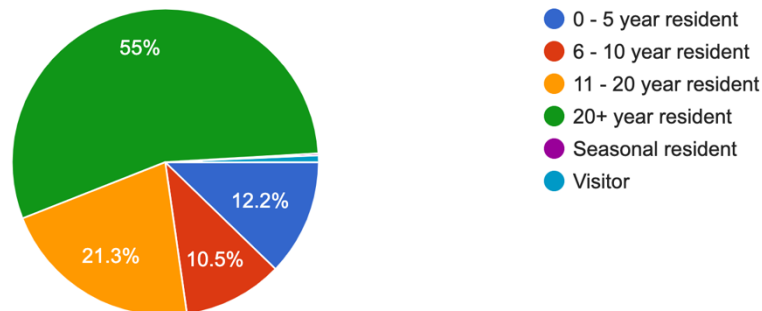
973 responses



Question #3 asked residents how long they have resided in West Milford. More than half of the respondents (55%) have lived in the Township longer than 20 years. Those that have lived in the Township for 11 to 20 years comprise 21.3% of respondents. Residents who have lived in the Township less than one year, up to 5 years, comprise 12.2% of respondents.

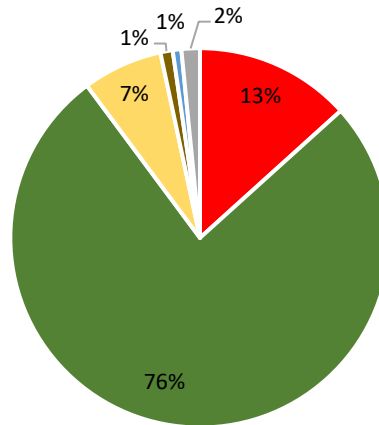
Which of the following best describes your history in West Milford?

972 responses



Question #4 asked respondents what they feel is West Milford's greatest asset. The majority (76%) said that the scenery in the Township is the greatest asset. Sense of community was the next largest response (13%), and recreation opportunities was also fairly popular (7%). Those that responded "Other" mentioned aspects such as safety, isolation from other communities, the Township's lakes, and "the unique balance of nature and commerce."

In your opinion, what is West Milford's greatest asset?

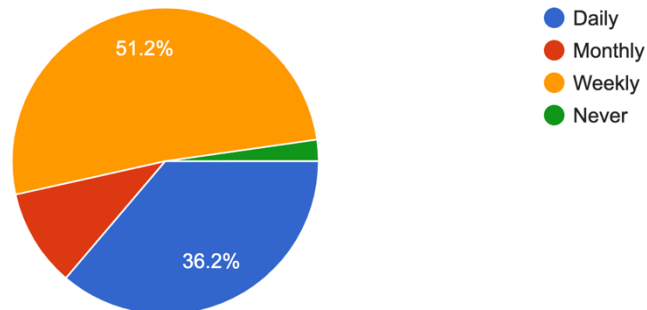


- Sense of community
- Scenery / nature
- Recreation opportunities
- Historic landmarks and sites
- All of the above
- Other

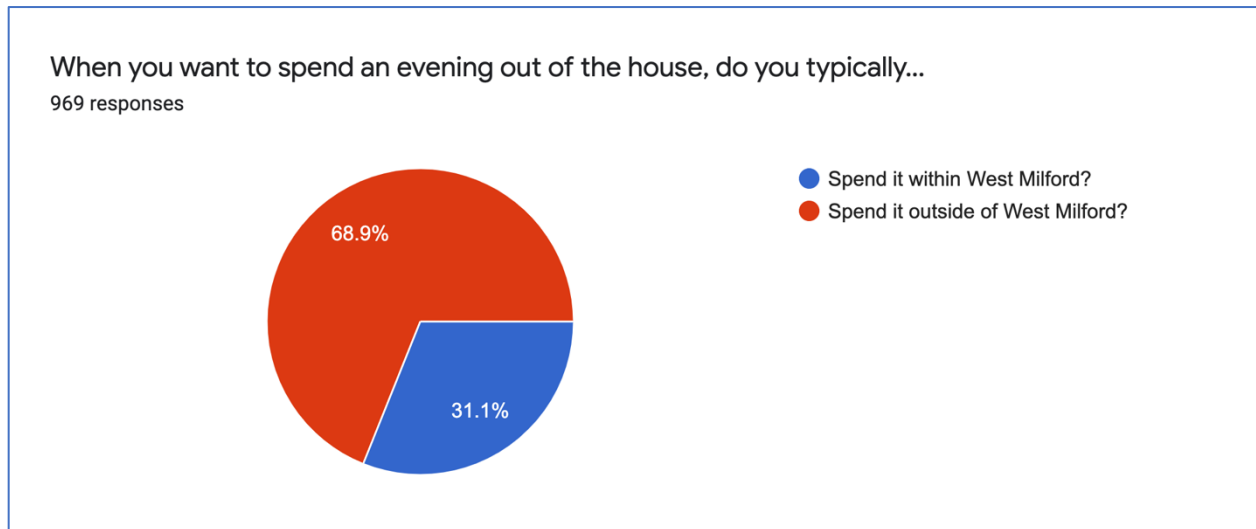
Question #5 asked respondents how often they patronized West Milford's businesses prior to the COVID-19 pandemic. Just over half responded weekly (51.2%), and 36.2% said they patronized the Township's businesses daily. 10.3% of respondents said they patronize businesses on a monthly basis, and 2.2% said they never patronize businesses in the Township.

Prior to the COVID-19 pandemic, about how often did you patronize West Milford's businesses?

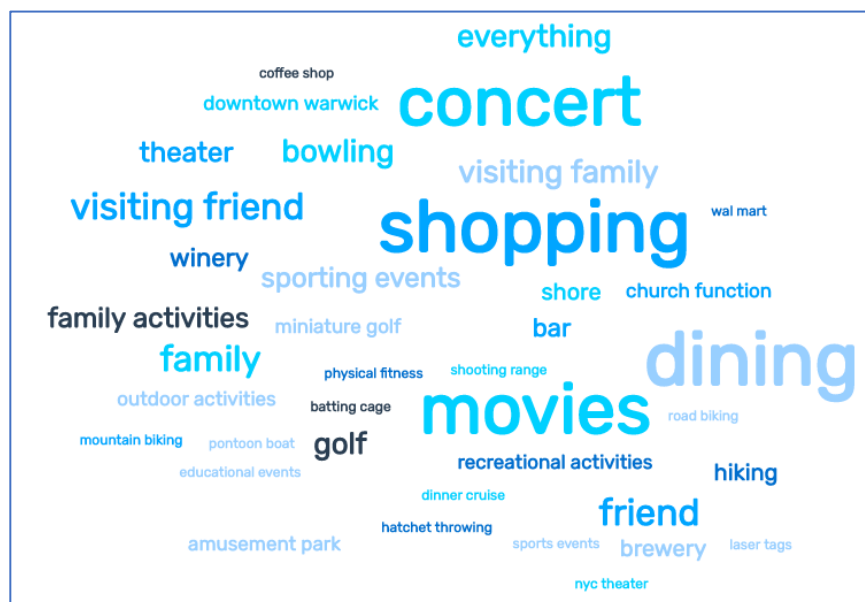
972 responses



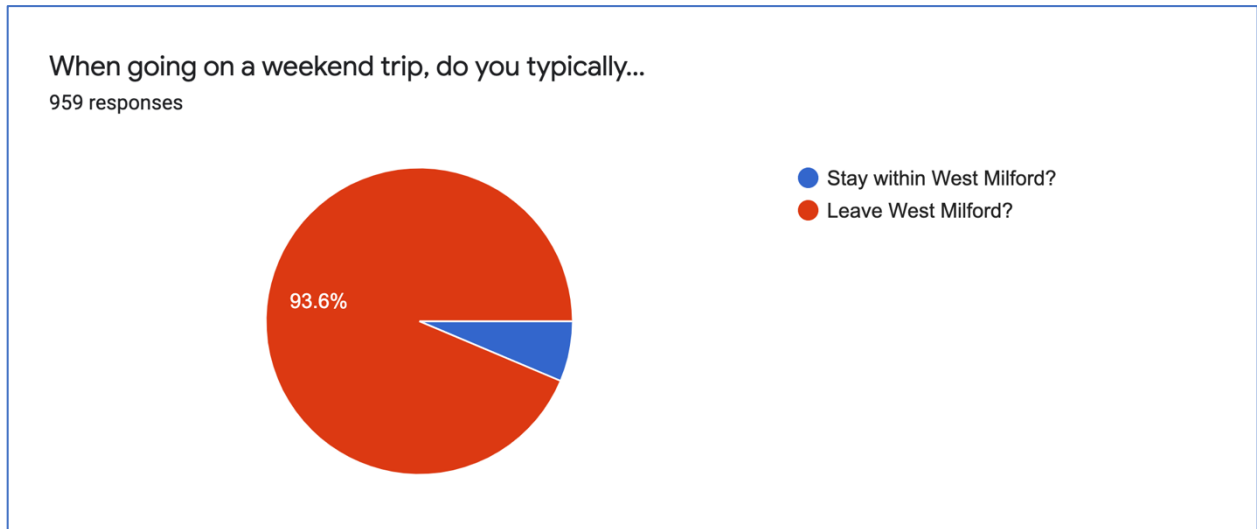
Question #6 asked respondents where they spend an evening out of the house. 68.9% of respondents said that they spend it outside of West Milford and the remaining stay in the Township (31.1%).



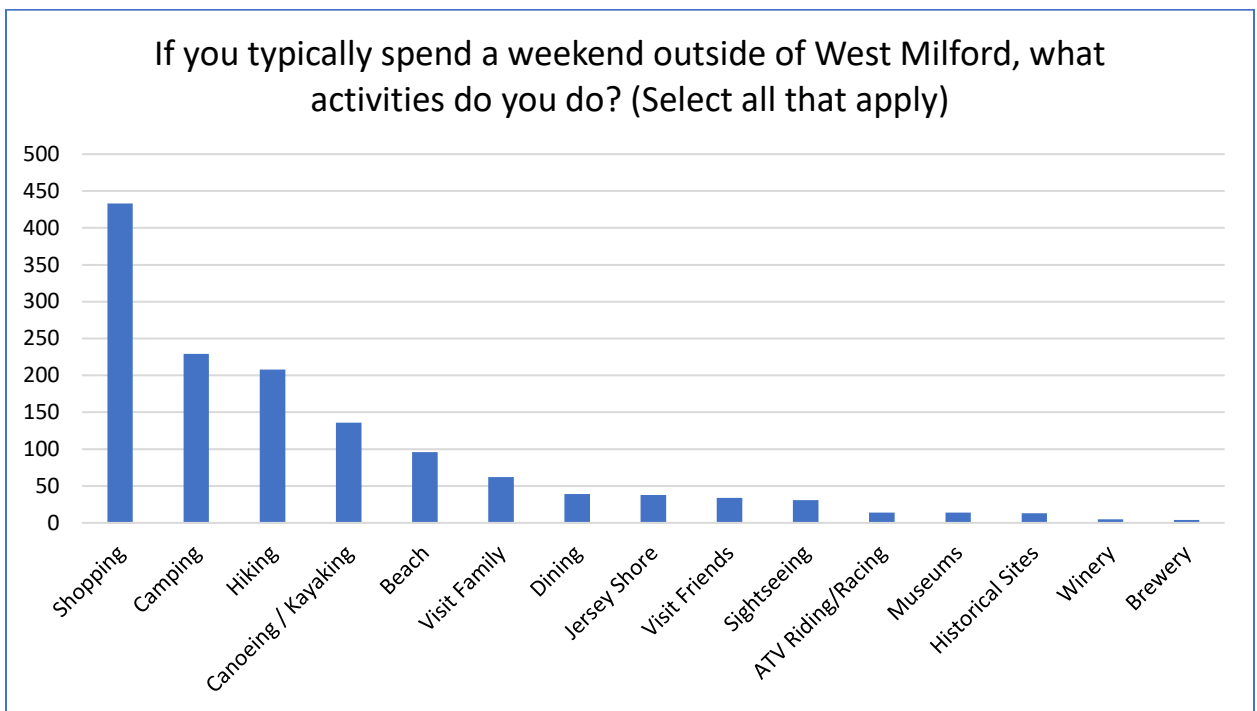
Question #7 asked respondents what activities they participate in when spending an evening outside of West Milford. The options of dining, shopping, movies, and concerts were listed and respondents were encouraged to select all that applied as well as write in activities not listed. Dining was the most popular, with about 88.2% of respondents choosing it. 72.4% of respondents said that they would spend an evening shopping outside of West Milford, and 55.7% responded with going to the movies. 43.3% of respondents chose concerts. Below is a word cloud that illustrates additional activities that respondents leave the Township to participate in on a typical evening out of the house. The larger the word or phrase, the more often it was mentioned by respondents.



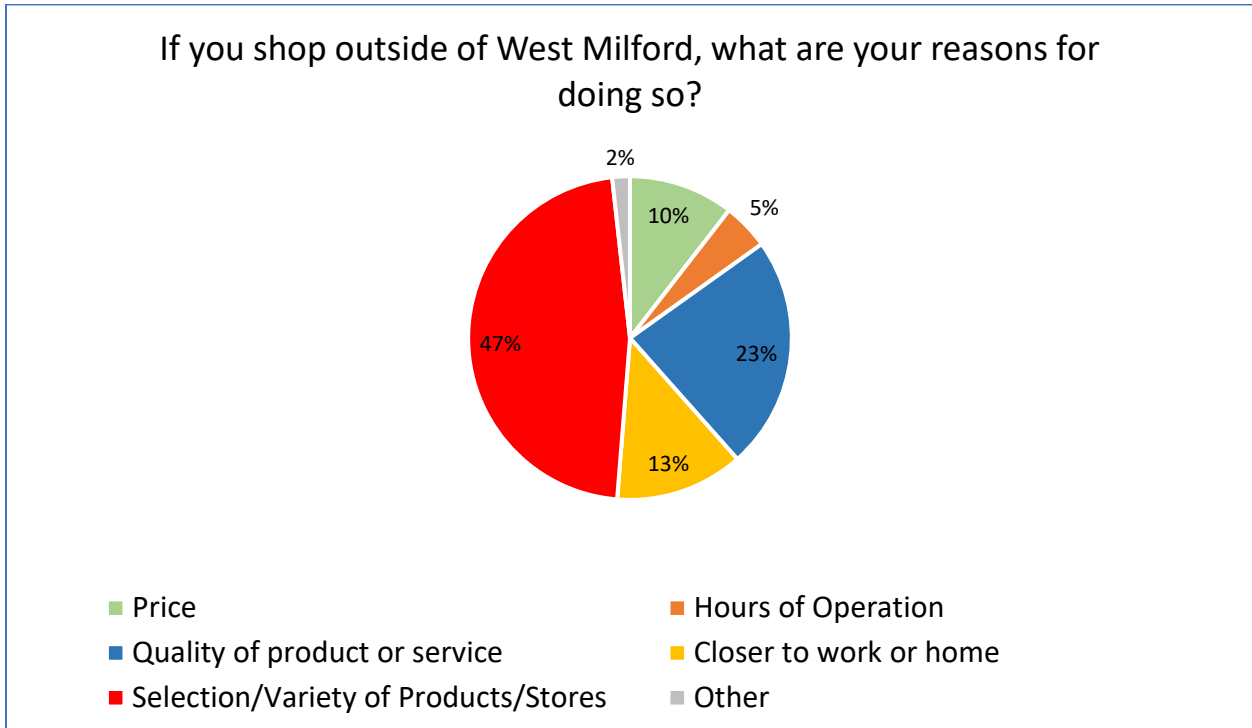
Question #8 asked respondents if, when going on a weekend trip, they typically stay in West Milford or leave the Township. 93.6% of respondents said they typically leave West Milford for a weekend trip.



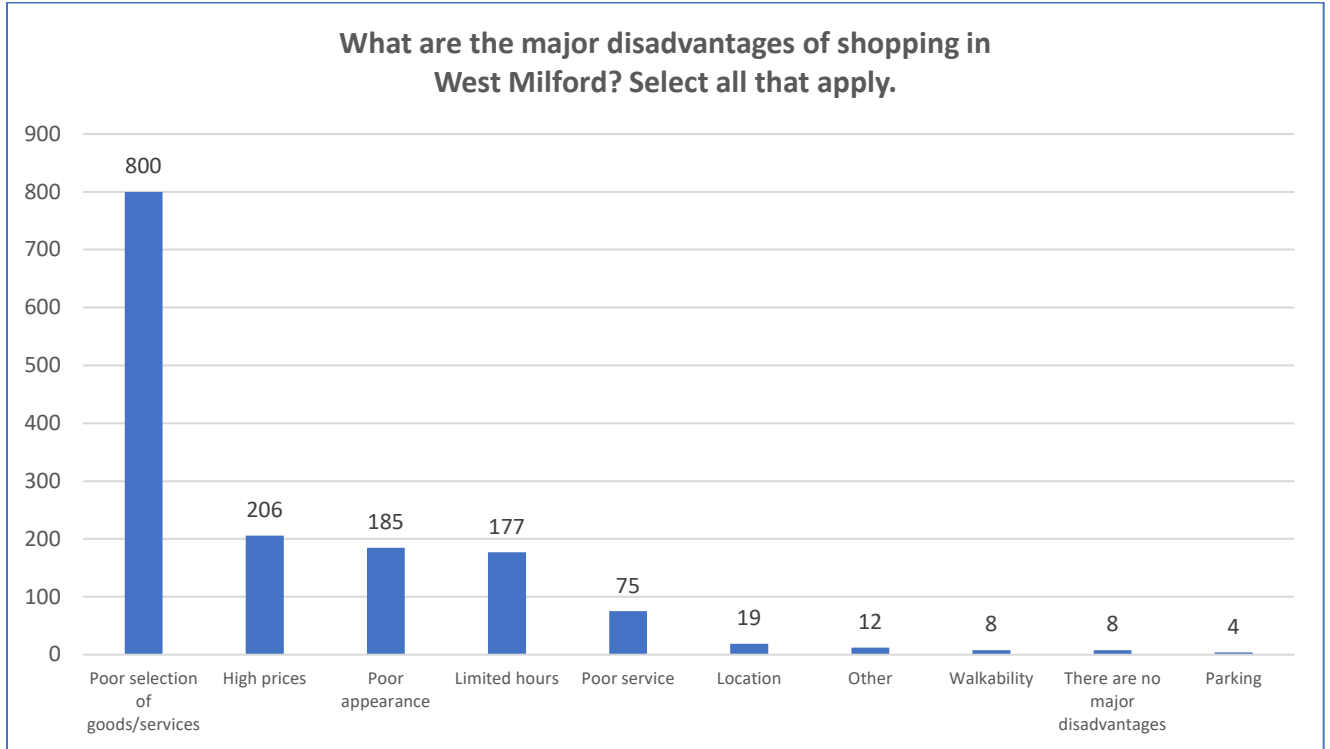
Question #9 asked respondents what activities they participate in when they leave West Milford for a weekend. The graph below illustrates the activities respondents leave West Milford to participate in. Most go away for the weekend to shop (49.9%), though camping (27.1%) and hiking (25.2%) were popular activities as well.



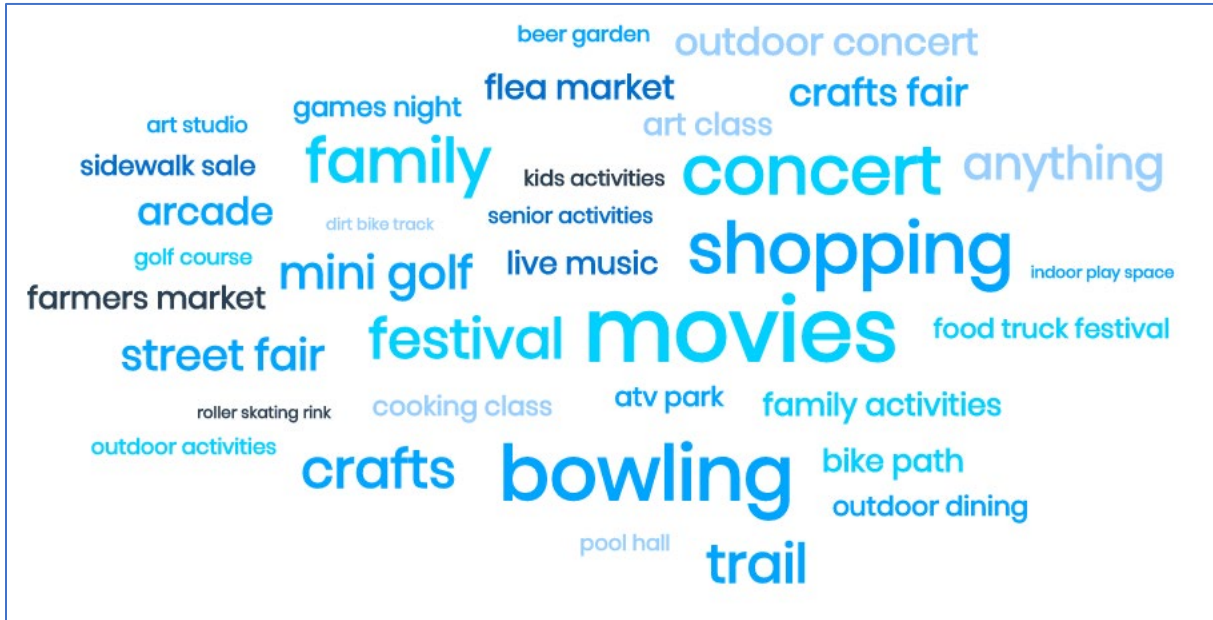
Question #10 asked respondents why they shop outside of the Township. About half (47%) of respondents said the selection and variety was the primary reason they shopped outside of the Township,



Question #1 I asked respondents what they feel are the major disadvantages of shopping in West Milford. 800 respondents (84% of total responses to this question) indicated that the Township has a poor selection of goods and services. High prices (21.7%), poor appearance (19.5%), and limited hours (18.6%) were also deterrents to shopping in West Milford.



Question #13 asked respondents what types of activities they would participate in if they were available in West Milford’s business districts.



Question #14 asked respondents what merchants can do to improve their stores. Those that selected “Other” included the following suggestions:

- Better marketing/advertising, particularly on social media
- Add electric vehicle charging stations
- Phone service for seniors to shop from home
- Online purchases with local pick up
- Yearly local merchant list sent out
- Town atmosphere
- Delivery
- Hold fun events



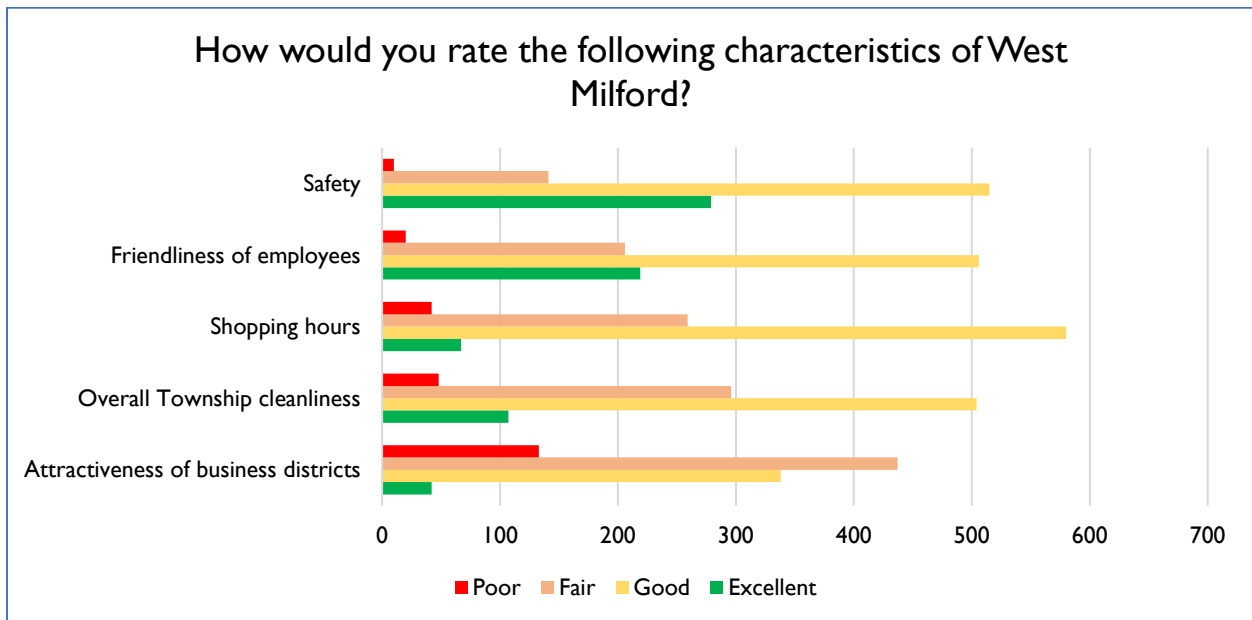
Question #15 asked respondents what West Milford’s most underutilized assets are. The following assets were the most popular answers:

Open Space/Land	131
Jungle Habitat	45
Greenwood Lake	22
Brown's Point	19
Hillcrest School	19
Vacant Land	18
Bowling Alley Site	12
Historic Sites	11
Belcher's Creek	3

Question #16 asked respondents what they feel West Milford’s economic development priorities should be. The following is how respondents ranked the listed options:

1. Year-round recreation and tourism (710 responses)
2. Improved community facilities (677 responses)
3. High tech / emerging industries (364 responses)
4. Construction / development (241 responses)
5. Manufacturing (171 responses)

Question #17 asked respondents to rank various attributes of the Township itself, including safety, friendliness of employees, shopping hours, overall Township cleanliness, and the attractiveness of business districts in the Township.



Business Owner Survey

The business owner survey distributed received 53 responses. The first question asked respondents whether they resided in the Township or elsewhere. 47 of 51 respondents (92.2%) indicated they live in the Township and 4 respondents (7.8%) owned a business in the Township but reside elsewhere.

Question 2 asked respondents to describe the nature of their business (retail, restaurant, professional, etc.). Respondents indicated they work in the following sectors:

Professional (lawyer, architect, etc.)	21
Service (salon, dance studio, etc.)	9
Retail	6
Automotive repair	2
Manufacturing	2
Antiques/thrift store	1
Real Estate Professional	1
Construction (sheds, barns, etc.)	1
Garage door company	1
Pet sitter	1
Marina	1
Restaurant	1
Silicone manufacturing and distribution	1
Landscape construction/garden center/retail store; Recycling yard	1
Nationwide nonprofit	1

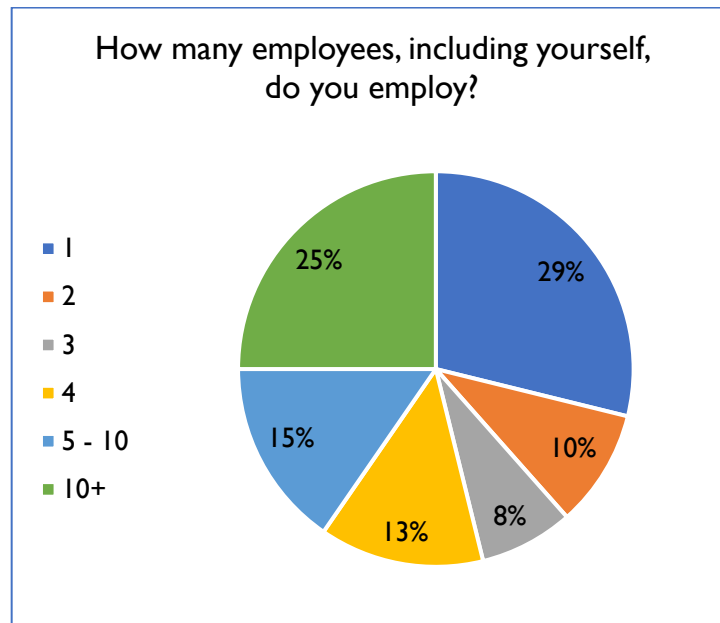
Question #3 asked respondents to report their hours of operation. Most respondents (11) work the standard 9:00 A.M. to 5:00 P.M., with some variation on starting and closing hours. Multiple respondents reported that their business operates 24 hours (5), and some businesses also reported operating on the weekends (5).

M-F 5:00AM to 8:00PM	1
M-F 6:00AM to 5:00PM	1
M-F 7:00AM to 3:30PM	2
M-F 7:00AM to 7:00PM	1
M-F 8:00AM to 4:00PM	1
M-F 8:00AM to 5:00 PM	2
M-F 8:00AM to 6:00 PM	2
M-F 8:00AM to 7:00PM	1
M-F 8:00AM to 10:00PM	1
M-F 8:30AM to 5:00PM	1

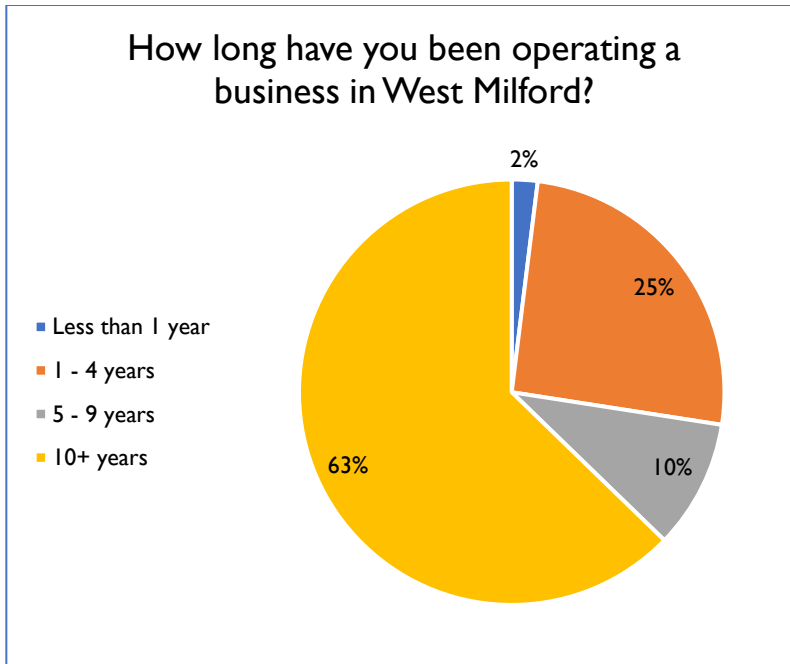
M-F 9:00AM to 5:00PM	11
M-F 9:00AM to 6:00PM	1
M-F 9:30AM to 6:00PM	2
M-F 9:30AM to 9:00PM	2
M-F 10:00AM to 5:00PM	2
M-F 10:00AM to 6:00PM	3
M-F 11:00AM to 7:00PM	1
M-F 11:30AM to 8:30PM	1
Weekends	5
24 Hours	5
Varied	7
By Appointment	3

Question 4 asked respondents whether they own or lease their business operates in. 64% of respondents said that they owned the building, while the remaining said they lease.

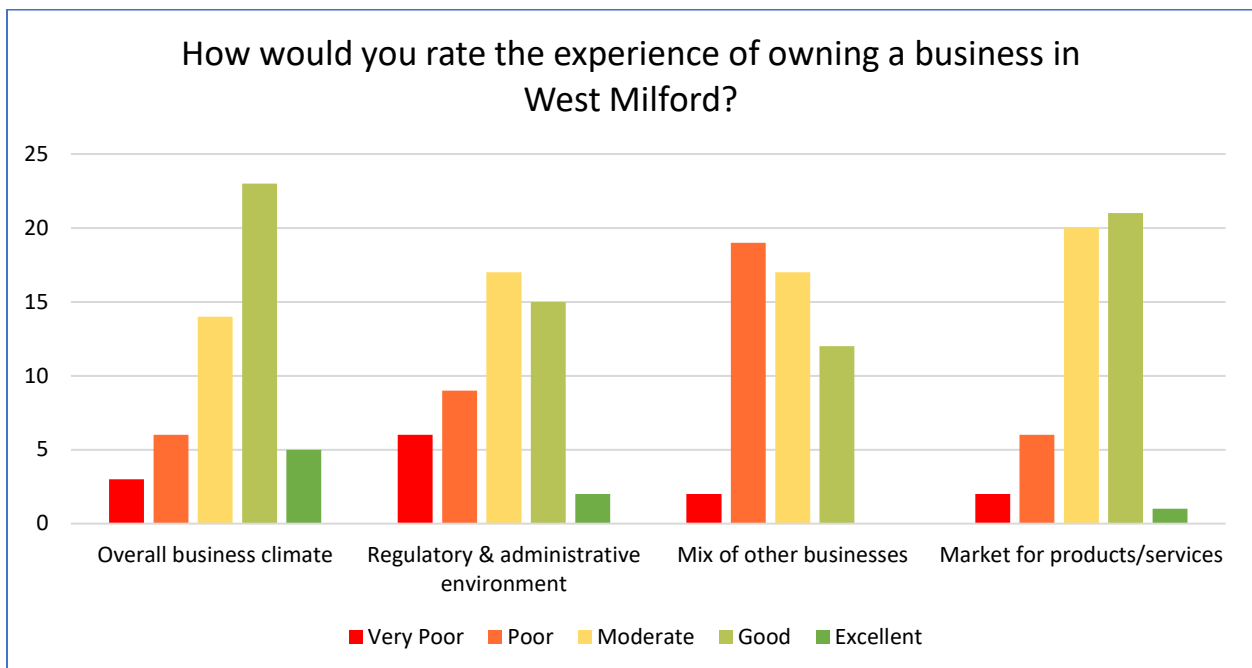
Question 5 asked respondents to indicate how many how many employees, including themselves, they employ. Most (29%) work for themselves, and the next largest response was 10+ employees (25%).



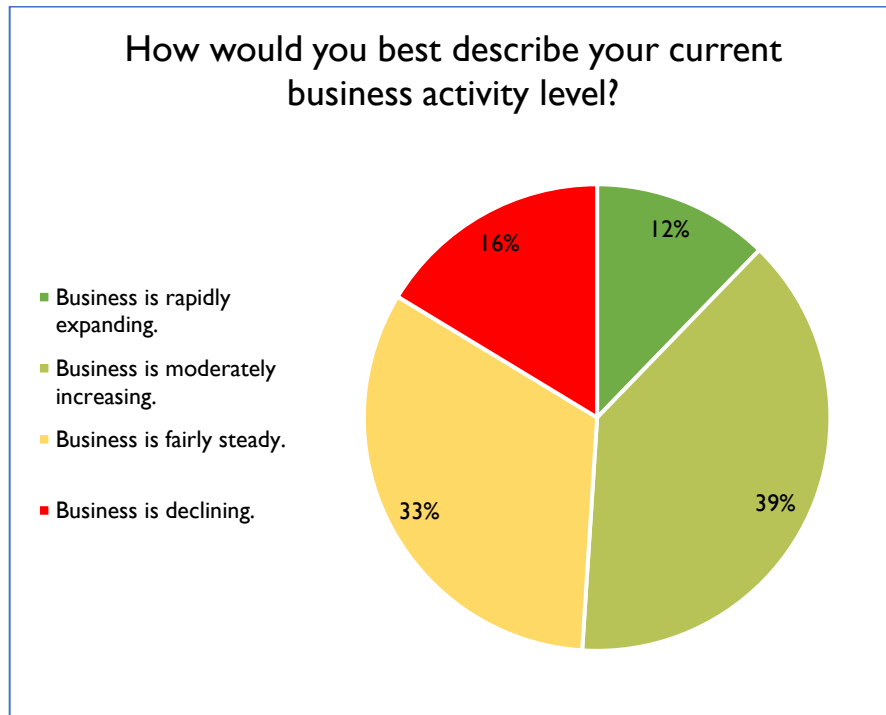
Question 6 asked respondents to indicate how long they have been operating a business in the Township. 63% indicated that they have been operating a business in the Township for 10 or more years. 25% of respondents answered that they have been operating a business in the Township for 1 – 4 years. Only one respondent indicated they have been in the Township for less than one year.



Question 7 asked respondents to rate various aspects of owning a business in West Milford. Generally, respondents rated the overall business climate as “moderate” to “good.” This category also had the highest number of positive ratings (5 “excellent” and 23 “good”) The regulatory and administrative environment had the most varied responses, with “moderate” being the most popular rating. The “mix of other businesses” category had the most negative responses (19 “poor” and 2 “very poor”) of the four categories.



Question 8 asked respondents to describe the current activity level of the business that they own. Just over half (51%) of respondents indicated that their business’s activity level is moderately or rapidly increasing. 33% of respondents described their activity level as fairly steady, and 16% described the activity level as declining.



Question 9 asked where the majority of their customers or clients come from. 56% of respondents indicated that most of their clients come from West Milford, and 23% of respondents indicated that the majority of their clients are tourists, second-home-owners, or nonresidents. Respondents who checked “Other” included the following responses:

- “Northern New Jersey”
- “All over the area”
- “Large NJ Companies”
- “Northern NJ, NY area”

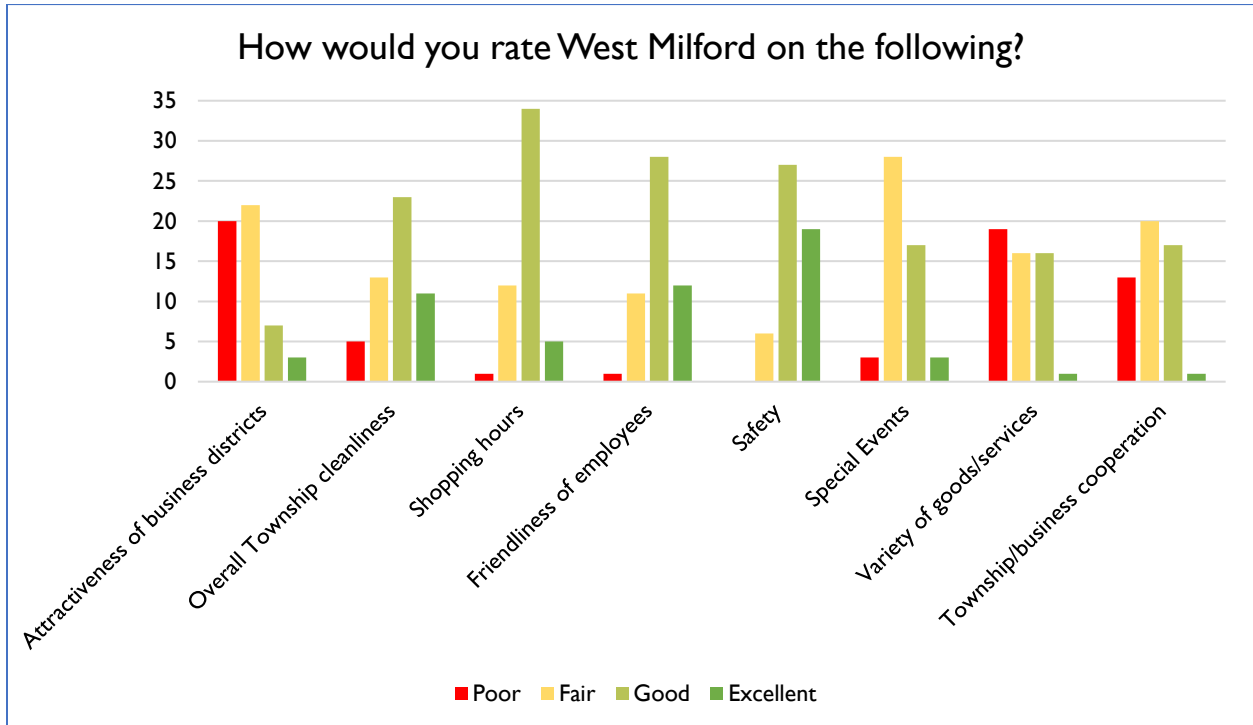
Question 11 had respondents describe disadvantages of conducting business within the Township. The most frequently occurring issues involved the permitting process around starting and growing a business, lack of regulation and ordinance enforcement, and little to no advertisement, visibility, and promotion of local businesses.



Question 12 asked business owners which businesses they feel would attract more visitors to the Township. These results echo those from the customer survey as well as stakeholder meetings. Responses to this question include home improvement stores, a variety of restaurants and food stores, and an emphasis on recreation and tourism.



Question 13 asked respondents to rate West Milford on the following categories: attractiveness of business districts, overall Township cleanliness, shopping hours, friendliness of employees, safety, special events, variety of goods/services, and Township/business cooperation. The category, “attractiveness of business districts,” received the highest number of negative responses (20 “poor” and 22 “moderate”), and “shopping hours” received the highest number of positive responses (34 “good” and 5 “excellent”). “Safety,” “friendliness of employees,” and “overall Township cleanliness” generally received “good” responses. The category, “variety of goods and services” received the 19 “poor” and 16 “moderate” responses, and “Township/business cooperation” received 13 “poor” and 20 “moderate” responses.



Postcard

The image below was sent out to businesses throughout West Milford to raise awareness about the survey.

YOUR BUSINESS. YOUR VOICE.

The West Milford Planning Department is asking those that own a business in the Township their opinions and attitudes towards key issues. The results of this survey will be used to determine economic development strategies that benefit business owners, consumers, and residents.

Visit the link or snap a photo of the QR Code to make sure your voice is heard!

For more information, contact

Christopher Garcia, Chairman, West Milford Planning Board
Tel: 973.728.2798

SCAN ME



OR VISIT

<https://forms.gle/MNMH8o1U1UqNjWqP9>

Appendix C: Commercial Properties

West Milford Village Center / Town Center

Block	Lot	Address	Owner	Acreage
5701	1	1502-14 UNION VALLEY RD	HLP UNION VALLEY RD LLC	1.60
5701	3	4 MARSHALL HILL RD	PETRO TWO INC	0.37
5701	4	10 MARSHALL HILL RD	PETRO TWO INC	1.10
5701	5	14 MARSHALL HILL RD	PETRO 3,INC A N.J.CORP.	0.29
5701	6	16-22 MARSHALL HILL ROAD	GDS ENTERPRISES LLC	0.75
5701	7	24 MARSHALL HILL RD	AIAZZONE PAUL & GRACE	0.14
6301	5	1554 UNION VALLEY RD	LAPEER LLC	0.52
6301	6	1560 UNION VALLEY	WEST MILFORD POSTAL PROPERTIES LLC	1.20
6303	14	41 MARSHALL HILL RD.	MCDONALDS USA LLC	0.46
6303	15	9-35 MARSHALL HILL	INSERRA WEST MILFORD II LLC	12.50
6303	16	1530 UNION VALLEY RD	FIRST NAT'L BANK C/O THOMSON REUTER	2.00
6303	17	1542 UNION VALLEY RD	PRIMO PROPERTIES LLC	1.30
6303	18	1546 UNION VALLEY	MR WONTON LLC	0.55
7520	1	1433 UNION VALLEY ROAD	UVR ASSOCIATES LLC	1.15
7521	1	1411 UNION VALLEY	EARL, GARY & BONNIE	1.19
7601	1.01	1467 UNION VALLEY RD	WEST MILFORD LLC	0.29
7601	1.02	1465 UNION VALLEY ROAD	RANDA INVESTMENTS LLC	0.49
7601	2	1463 UNION VALLEY RD	RANDA INVESTMENTS LLC	1.37
7601	4	1451 UNION VALLEY	RANDA INVESTMENTS LLC	0.36
7601	5	1449 UNION VALLEY RD	TOWN COMMONS OF WEST MILFORD LLC	0.43
7601	6	1441-1447 UNION VALLEY RD	TOWN COMMONS OF WEST MILFORD LLC	0.83
7601	8	1435 UNION VALLEY ROAD	TOWN COMMONS OF WEST MILFORD LLC	1.05
7620	2	1549 UNION VALLEY RD	BSP REALTY LLC	0.46
7620	3	1543 UNION VALLEY RD	HJELMAR ROY J & PHYLLIS	0.23
7620	4	1539 UNION VALLEY RD	TRAVIESO SHARON	0.23
7620	5	2 ORCHARD LANE	FLYNN COLLEEN	0.23
7621	1	1527 UNION VALLEY RD	LAKELAND STATE BANK	0.93
7621	2	1521 UNION VALLEY RD	SHOTMEYER ALBERT	0.53
7621	3.01	1501 UNION VALLEY ROAD	COLUMBIA SAV BANK C/O ROBYN WELLS	1.49
7621	3.02	1499 UNION VALLEY ROAD	J&J ASSOCIATES	1.49
7621	4	1495 UNION VALLEY	WM PROPERTIES LLC	0.32
7621	5	1489 UNION VALLEY	TAZ ENTERPRISES LLC	0.59
7621	6	1483-85 UNION VALLEY RD	BRIKE LLC	0.37
7621	7	1477 UNION VALLEY RD	TOWNSHIP OF WEST MILFORD	0.95
7621	8	UNION VALLEY & VISTA	WEST MILFORD,LLC%JANINE LASINSKI	0.30
7903	8	1422 UNION VALLEY RDE	MOELLER AUTOMOTIVE INC	0.35
7903	9	1432 UNION VALLEY RD	STRENGTHEN OUR SISTERS INC	4.40
7903	10	1440 UNION VALLEY RD	RICHARDS FUNERAL HOME INC	2.33

Hewitt Village Center

Block	Lot	Address	Owner	Acreage
3501	2			
3610	26	1975 GRNWD LK TPK	BROWNS POINT LAKE SERVICES LLC	3.30
3611	1	GRNWD LK TPKE	STATE OF NJ/DIV OF PARKS & FORESTRY	10.70
6701	7			
3503	24	1935 UNION VALLEY RD	DREYHAUPT BARBARA	0.59
3503	12	9 LAKESIDE RD	LEND MORE LLC	0.67
3504	2	5 LAKESIDE RD	LINDSAY MARK D	0.34
3509	17	2020 GRNWD LAKE TPKE	ALEXANDER SONYA,LLC	1.60
3504	3	1 LAKESIDE RD	L&B PROSPERO C/O CATTANI INC.	0.36
6701	10	1938 UNION VALLEY RD	WEST MILFORD SHOPPING PLAZA	13.62
3504	1	1943 UNION VALLEY RD	GRANT PROPERTIES II LLC	0.69
6701	13	1946 UNION VALLEY ROAD	PEN LLC%MOUNTAIN LAKES AUTO WASH	2.74
3610	25	RINGWOOD LANE	ELEANOR HOEHNER LIVING TRUST	0.52
6701	8	1910 UNION VALLEY	1910 UNION VALLEY W.MILFORD%GETTY	0.67
3503	23	1939 UNION VALLEY RD	RICK ESAK 101,LLC A N.J.LLC	0.09
3504	4			
3509	16	2 LAKESIDE RD	SKS INC	0.39
3509	14	2012 GRNWD LK TPKE	WALSH, C	1.10
3603	7	2019 GRNWD LK TPK	ADELO CORPORATION	0.68
3603	8	2007-11 GRNWD LK TPK	SLATER,GLENN,&PAULOUICH,JOHN	1.10
3601	1	1952 UNION VALLEY	1952 UNION VALLEY RD LLC	1.33
3601	2	STAINSBY RD.	ADELO CORPORATION	0.16
3610	26	1975 GRNWD LK TPK	BROWNS POINT LAKE SERVICES LLC	3.3
3610	29	1941 GRNWD LK TPKE	CZARNECKI,PETE & IRENE	1.02
3610	30	GREENWOOD LAKE TPKE	538 LAKESIDE ROAD LLC	1.50
3610	27.01	GREENWOOD LK TPKE	TOWNSHIP OF WEST MILFORD	2.21
3610	27.02	GR LK TPK	NEW JERSEY TRANSIT CORP	2.21
3610	28	GREENWOOD LAKE TPKE.	STATE OF NJ-TRANSIT AUTHORITY	1.20
3610	31	1925 GRNWD LK TPKE	BEYJOUN, ANISE	0.59
3705	5	1894 GRNWD LK TPKE	FASS,ELIZABETH & PATRICK	0.27
3704	1	1891 GREENWOOD LK TPKE.	ALEX AND AMRIK GAS, LLC	0.38

Route 23 Corridor

Block	Lot	Address	Owner	Acreage
14701	49	58 OLD ROUTE 23	CARBAJAL GINO	0.43
14701	50	62 OLD ROUTE 23	BRC 123 LLC	0.70
14701	51	ROUTE 23	CITY OF NEWARK-DIV SEWER&WATER UTIL	0.20
14701	53	76 OLD ROUTE 23	STRENGTHEN OUR SISTERS INC	1.56
14702	2	ROUTE 23	WEST MILFORD TOWNSHIP LIBRARY	0.26
14702	4	2 KANOUSE ROAD	JBT PROPERTY MANAGEMENT LLC	0.97
14703	1	ROUTE 23	CITY OF NEWARK-DIV SEWER&WATER UTIL	8.70
15505	1	2899 ROUTE 23	SAP MANAGEMENT INC	1.30
15505	2.02			
15507	1	ROUTE 23	CITY OF NEWARK-DIV SEWER&WATER UTIL	2.40
15701	1	2950 RTE. 23	HOOK 2950 LLC	2.46
15701	4	2962 ROUTE 23	TREWEEKE THOMAS & JILL	0.76

15701	7	2974 ROUTE 23	CHRISTOPHER CAROL A & ANDREW	0.43
15701	34	5 ALLISON AVE	SLS INVESTMENT GROUP LLC	0.41
15701	35	2986 ROUTE 23	DOWN KEVIN	1.53
15701	37	3002 ROUTE 23	THOMAS & JEANNE DAYON FAMILY TRUST	4.23
15703	1	2940 ROUTE 23	W M TWSP FIRST AID SQUAD	0.15
15803	1	2969 ROUTE 23	O'BRIEN DAVID& BARR,GUNNER C/O OBAR	0.71
15803	2	2963 ROUTE 23	TRACED2963 LLC	0.90
15803	3	ROUTE 23	CITY OF NEWARK-DIV SEWER&WATER UTIL	0.23
15803	4	4 OAK RIDGE RD.	ANSABOANI23 LLC	0.52
15803	10	38 OAK RIDGE RD.	KIMBLE PROPERTIES LLC	2.11
15803	11	46 OAK RIDGE ROAD	KIMBLE RICHARD H.	0.65
15803	12	52 OAK RIDGE RD.	ABZ HOLDING CO LLC	1.34
15804	6	39 OAK RIDGE ROAD	THIRTY NINE OAK RIDGE RD REALTY,LLC	0.48
15804	7	35 OAK RIDGE RD.	35 OAK RIDGE ROAD LLC	0.87
15804	12	7 OAK RIDGE ROAD	J.T.MASE PROPERTIES L.L.C.	1.34
15804	14	2925 ROUTE 23	STRUS GEORGE & D.&STRUS,G.N.	4.60
16001	1	ROUTE 23	TOWNSHIP OF WEST MILFORD	0.12
16001	2	ROUTE 23	SCHAFFER, EDWARD J.	0.52
16001	3	3055 ROUTE 23	3055 RT 23 HOLDINGS LLC	0.55
16001	4	3051 RT 23	HARI OM RAJ,INC	0.42
16001	5	3043 ROUTE 23	LA SALANDRA, G. & RIGGIO	0.47
16001	6	ROUTE 23	FREDERICK FUEL & HEATING SCV	0.45
16001	7	3031 ROUTE 23	3031 RT 23 LLC	0.39
16001	8	3025 ROUTE 23	HPLAY OF WEST MILFORD LLC	0.24
16001	9	3021 ROUTE 23	3023 ROUTE 23 CORP.LLC	0.27
16605	22	3050 ROUTE 23	KATTNER ENTERPRISES LLC	2.12
16605	24	3060 ROUTE 23	CCCMB MANAGEMENT LLC	1.99
16606	1	3034 ROUTE 23	CRANE,DEWAYNE & GAYLE	0.15
16606	2	3036 ROUTE 23	TATRO,MICHAEL & AMY	0.24
16606	10	3022 ROUTE 23	WHITTY TRANSMISSIONS INC	0.73