

PHILADELPHIA EMPLOYMENT NODES: WHERE RESIDENTS WORK



BASICS

 Center City (CC) refers to Philadelphia's downtown

CC employed

267,331

workers in 2008



BASICS

 Center City (CC) refers to Philadelphia's downtown

CC workers earned

\$12.1B

in total salaries in 2008



HISTORY OF EMPLOYMENT RESEARCH

- 2003 & 2005 Studies
 - Partnered with Dept of Revenue
 - Unable to achieve employee totals
 - Time consuming
 - Arduous to revise or replicate
 - Wage Tax



Center City's Office Sector: Restarting the Engine for Growth

Philadelphia's civic and polisical leaders have been srapped in a picky comandam that give scome compenies compenies easien neighborhood visellay, forcing a false choice beaven cuesing business saxes and funding municipal services. As a city when has been lossing jobs and residenss for more than 51 years, Philadelphia needs to put aside divisive debates and develop a consensus strategy so espand bosh private-sector jobs and municipal services. This teport, based on original research by CPDC on where employees work and live, offers new information essential to such a strategy.¹

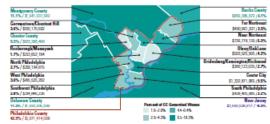
Looking Bac

A censury ago, Philadelphia was the largest, most diversified industrial city in North America. More than 16,000 factories in Fishwan, Kensingson, Nicesown, Germanown, North, Souah and Wess Philadelphia generated a quarter-million jobs for rowhouse residents. But in the last 50 years, these jobs have almost entirely vanished from Northeaseem cities and from North America. Once 52% of the city's workforce was engaged in manufaceuring odds, it's only 6%.

Major public investments, begun in the 1950s, enabled Philadelphia to reposition itself as the national economy shifted to service-sector employment. Today, 70% of Philadelphia's private-sector jobs are in office buildings, in education and health care, or in leisure and hospitality. While downcown comprises just 3% of the city's land area, its jobs accounts for 47% of all private-sector wages paid citywide. They generate 56 billion in annual salaries to Philadelphia residents and another 50 billion in salaries to hruscholds in surrounding counties. The institutions of University Giy accounts for an additional 10% of all private-sector wages paid citywide and generate 5774 million in annual salaries to Philadelphia residents and another \$1.1 billion in salaries to obose in surrounding counties, in sum, 57% of the city's consonny can be found between Front and 40th Streets, Spring Garden to South Street.²

Jus is Stesson Has, Midwile-Heppensull Seed and Cramp Shiparth were the economic behave of our neighborboods as the start of the 20th centure, poss-industrial jobs in offices, houghed, houred and educational institutions are the economic lifethood of the 21st century. They offer a broad range of opportunities from entry-lovel, so enchanical, to highskill, high-wage jobs, As a result, CHPC's research shows that downsome employers pay \$500 million in annual starties to households of Philadelphia's Northwess, \$495 million to New Philadelphia's readents, \$910 million to Amount of the the Part Northeass, \$418 million to South Philadelphia residents and \$550 million to households in North Philadelphia residents and \$550 million to households in North Philadelphia resi-

SALARIES PAID BY CENTER CITY EMPLOYERS: \$12,921,542,574 TOTA



Residents of Philadelphia sam 42.9% of downtown income. The malderts of the Pennsylvania suborts in Burks, Phoetier Delawars and Montgomery counties together cam 22.0 f Center City income; residents of New Jersey suborts sam 18.2%.

HISTORY OF EMPLOYMENT RESEARCH

Estimates

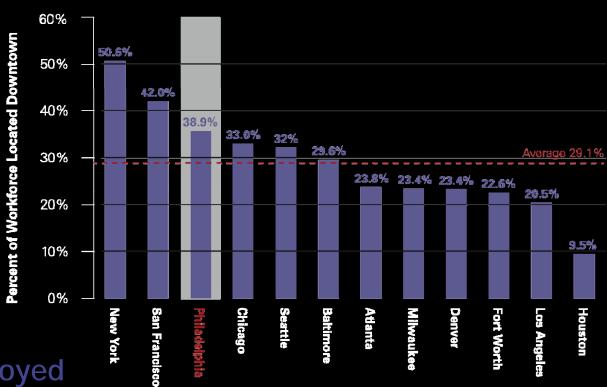
- Reliable for large employers (Eds & Meds)
- Doable for Office and Hospitality
- No standard for other sectors

GOALS FOR 2010 STUDY

- Identify Employment Nodes
- Determine Total Employment
- Where Workers Live
- Total Salaries by Node and Sector
- Combat Misconceptions



NATIONAL COMPARISON



Philadelphia employed

557,388

Private-sector workers in 2008



CENTER CITY EMPLOYMENT

Type of Employment	Total Employment	Source
Private Sector Partnerships Public Sector	216,937 7,000 43,394	OnTheMap Philadelphia Dept of Revenue Self-Reported
TOTAL EMPLOYMENT	267,331	



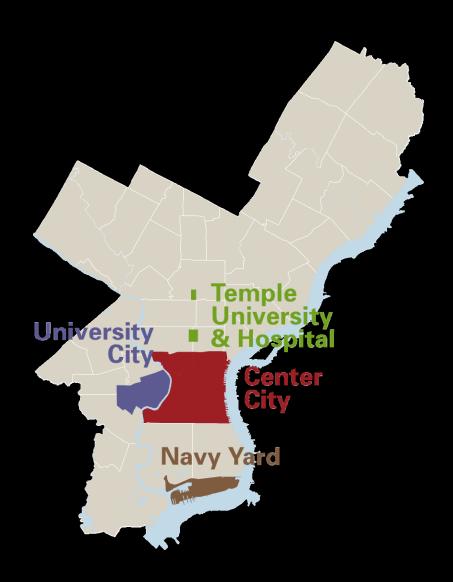
EMPLOYMENT NODES

- Not inclusive
- Most well-known
- High employment concentrations

These nodes represent

52.3%

of total private-sector Philadelphia employment





- CC provides over 210,000 jobs
- Office sector provides over 50% of jobs

	Center City		University City		Temple University		Navy Yard	
Industry Sectors	Total	Percent	Total	Percent	Total	Percent	Total	Percent
Office Sector								
Financial Services & Real Estate	35,534	16.38%	1,151	2.09%	206	1.35%	44	1.07%
Management, Professional & Technical Services	50,400	23.23%	1,827	3.31%	135	0.88%	983	23.99%
Information	11,125	5.13%	333	0.60%	70	0.46%	20	0.49%
Administration & Support	13,336	6.15%	1,087	1.97%	93	0.61%	1,198	29.24%
Office Sector Total	110,395	50.89%	4,398	7.97%	504	3.29%	2,245	54.80%
Educational & Health Services	43,753	20.17%	44,636	80.88%	13,587	88.80%	410	10.01%
Leisure & Hospitality	26,846	12.38%	3,346	6.06%	737	4.82%	9	0.22%
Retail Trade	10,262	4.73%	1,049	1.90%	249	1.63%	1	0.02%
Manufacturing & Construction	7,322	3.38%	513	0.93%	35	0.23%	967	23.60%
Wholesale, Transportation & Utilities	6,717	3.10%	337	0.61%	105	0.69%	452	11.03%
Other Services (excluding Public Administration)	11,642	5.37%	908	1.65%	84	0.55%	13	0.32%
Total	216,937		55,187		15,301		4,097	

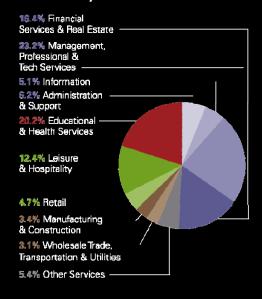
Source: LED, On the Map Application, BLS/US Census Bureau

- 1 in 5 jobs are in Eds & Meds
- Equal to University City in Eds & Meds
- Most diverse node

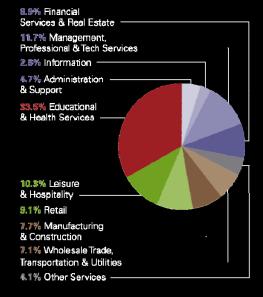
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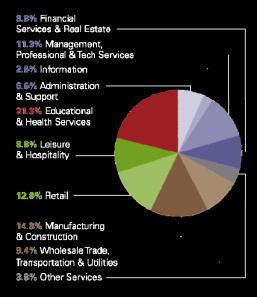
Center City



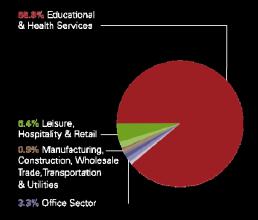
Philadelphia



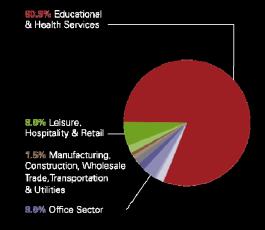
Philadelphia Region



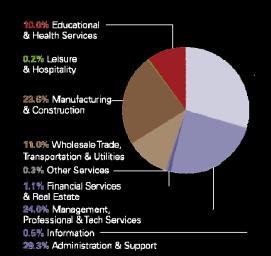
Temple University & Hospital



University City

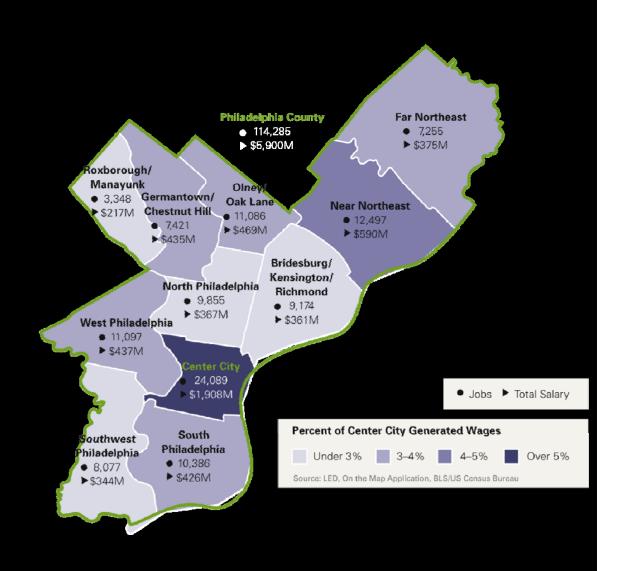


Navy Yard



WHERE WORKERS LIVE & SALARIES PAID

- Divided Philadelphia into 11 neighborhoods by ZIP Code
- Performed a Paired Analysis
- Applied BLS Annual Avg Salary by Sector

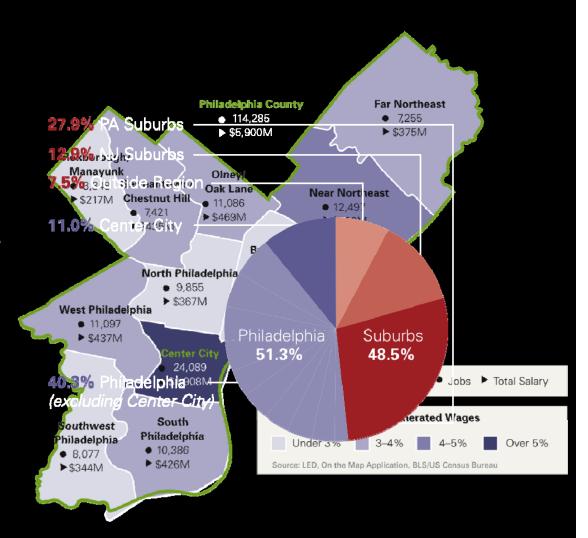




WHERE WORKERS LIVE & SALARIES PAID

- 51% of jobs held by Philadelphians
- \$12.1B in salaries
- CC holds 11% of the jobs and 16% of salaries

No single suburban county held more jobs in Center City or earned as much as Center City residents





IMPLICATIONS

Analysis by Councilmanic District

Combat misconceptions on CC decline

Importance of Office Sector to CC

Mass transit route adjustments over time



DRAWBACKS

No data source is perfect

Prone to large swings at small geographies

Not as useful in a time series



FUTURE STUDY

Add CC employment by Councilmanic District

Calculate percent of total neighborhood wages earned in CC

National downtown employment study

