



# RATING *the* REGION

METROPOLITAN INDICATORS REPORT



June 2016

DELAWARE VALLEY  
**dvrpc**  
REGIONAL  
PLANNING COMMISSION



*The Delaware Valley Regional Planning Commission is dedicated to uniting the region’s elected officials, planning professionals, and the public with a common vision of making a great region even greater. Shaping the way we live, work, and play, DVRPC builds consensus on improving transportation, promoting smart growth, protecting the environment, and enhancing the economy. We serve a diverse region of nine counties: Bucks, Chester, Delaware, Montgomery, and Philadelphia in Pennsylvania; and Burlington, Camden, Gloucester, and Mercer in New Jersey. DVRPC is the federally designated Metropolitan Planning Organization for the Greater Philadelphia Region — leading the way to a better future.*



The symbol in our logo is adapted from the official DVRPC seal and is designed as a stylized image of the Delaware Valley. The outer ring symbolizes the region as a whole while the diagonal bar signifies the Delaware River. The two adjoining crescents represent the Commonwealth of Pennsylvania and the State of New Jersey.

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# TABLE OF CONTENTS

<b>INTRODUCTION .....</b>	<b>3</b>
<b>DEMOGRAPHICS .....</b>	<b>7</b>
<i>Race and Ethnicity.....</i>	<i>11</i>
<i>National Origin.....</i>	<i>11</i>
<i>Age and Dependency.....</i>	<i>14</i>
<i>Educational Attainment .....</i>	<i>16</i>
<i>Income .....</i>	<i>20</i>
<i>Poverty .....</i>	<i>24</i>
<i>Housing Tenure and Occupancy.....</i>	<i>25</i>
<b>THE ENVIRONMENT AND NATURAL RESOURCES .....</b>	<b>29</b>
<i>Parks.....</i>	<i>29</i>
<i>Air Quality.....</i>	<i>33</i>
<i>Clean Jobs.....</i>	<i>36</i>
<b>LIVABLE COMMUNITIES .....</b>	<b>39</b>
<i>Housing Value and Costs.....</i>	<i>39</i>
<i>Housing Affordability.....</i>	<i>42</i>
<i>Cost of Living .....</i>	<i>44</i>
<i>Crime .....</i>	<i>46</i>
<i>Arts, Culture, and Recreation .....</i>	<i>46</i>
<i>Educational Opportunity .....</i>	<i>48</i>
<i>Health Care.....</i>	<i>50</i>
<i>Governance.....</i>	<i>52</i>

<b>THE ECONOMY .....</b>	<b>55</b>
<i>Employment and Labor .....</i>	<i>55</i>
<i>Income and Earnings.....</i>	<i>60</i>
<i>Real Estate .....</i>	<i>62</i>
<i>Gross Domestic Product.....</i>	<i>66</i>
<i>Company Headquarters .....</i>	<i>66</i>
<i>Exports.....</i>	<i>69</i>
<i>Innovation .....</i>	<i>69</i>
<i>Internet Access and Literacy .....</i>	<i>73</i>
<b>TRANSPORTATION .....</b>	<b>77</b>
<i>Commuting .....</i>	<i>77</i>
<i>Congestion .....</i>	<i>79</i>
<i>Transit .....</i>	<i>82</i>
<i>Maritime Trade.....</i>	<i>83</i>
<i>Aviation .....</i>	<i>84</i>
<b>SUMMARY AND CONCLUSION .....</b>	<b>89</b>
<i>Quality of Life .....</i>	<i>89</i>
<i>Housing .....</i>	<i>89</i>
<i>Educational Attainment .....</i>	<i>90</i>
<i>Income .....</i>	<i>90</i>
<i>Access to Health Care .....</i>	<i>91</i>
<i>Economic Competitiveness .....</i>	<i>91</i>
<i>Transportation .....</i>	<i>92</i>
<i>Political Representation .....</i>	<i>92</i>
<i>Conclusion .....</i>	<i>92</i>

## Figures

• Figure 1: Population Change in the MSA, 2005–2014.....	9
• Figure 2: Population Change in the Primary City, 2005–2014.....	9
• Figure 3: Persons per Square Mile, 2014 .....	10
• Figure 4: Percentage of the Population Living in the Primary City, 2014 .....	10
• Figure 5: Percentage Foreign Born, 2014 .....	13
• Figure 6: Dependent Population, 2014 .....	16
• Figure 7: High School Drop-Out Rate, 2014 .....	19
• Figure 8: Change in Median Household Income, 2010–2014.....	21
• Figure 9: Difference in Median Household Income, Primary City versus the MSA, 2014.....	22
• Figure 10: Change in Per Capita Income, 2010–2014.....	23
• Figure 11: Housing Vacancy Rate, 2014 .....	26
• Figure 12: City Spending on Urban Parks and Recreation per City Resident, 2014 .....	30
• Figure 13: Overall Park Score, 2015.....	31
• Figure 14: Percentage of City Residents with Walkable Park Access, 2014.....	32
• Figure 15: Registered Nonprofits Dedicated to Environmental Causes per 10,000 Residents, 2015.....	33
• Figure 16: Days with an Unhealthy Air Quality Index, 2014.....	34
• Figure 17: CO <sub>2</sub> Production by Commuters in Automobiles During Congested Time Periods, 2012 .....	35
• Figure 18: Change in Median Housing Value, 2010–2014 .....	40
• Figure 19: Ratio of Median Housing Value to Median Household Income, 2014 .....	43
• Figure 20: Cost-of-Living Adjusted Wage, 2014 .....	45
• Figure 21: Effective Property Tax per \$1,000 of Home Value, 2013 .....	45

- Figure 22: Total Crimes per 100,000 Residents, 2013 ..... 46
- Figure 23: Percentage of Reported Crimes that Were Violent Crimes, 2013..... 47
- Figure 24: Registered Nonprofits Dedicated to Arts, Humanities, and Culture per 10,000 Residents, 2015..... 48
- Figure 25: School Spending in the Primary City, 2013..... 49
- Figure 26: Residents per Health Care Worker, 2010 ..... 50
- Figure 27: Food Hardship Rate, 2012 ..... 51
- Figure 28: Diversity Index, 2013 ..... 58
- Figure 29: Unemployment Rate, 2015..... 59
- Figure 30: Labor Force Participation Rate, 2013..... 60
- Figure 31: Change in Per Capita Income, 2004–2014 ..... 62
- Figure 32: Retail Vacancy Rate, 2015 ..... 64
- Figure 33: Change in Gross Domestic Product, 2004-2014..... 67
- Figure 34: Change in Per Capita Gross Domestic Product, 2004-2014..... 68
- Figure 35: Overall Innovation Index, 2010..... 70
- Figure 36: Average Annual Patents Issued per 1,000 Workers, 2007–2011 ..... 73
- Figure 37: Average Commute Time to Work, 2014 ..... 77
- Figure 38: Change in Percentage of Commuters Who Drove Alone, 2006–2013..... 79
- Figure 39: Freeway and Arterial Lane Miles per Capita, 2014 ..... 80
- Figure 40: Change in Maritime Trade, 2003 and 2013..... 84
- Figure 41: Airline Freight and Mail Volume, 2014 ..... 86

## Tables

- Table 1: Population, 2005–2014 ..... 8
- Table 2: Race and Ethnicity, 2014 ..... 12
- Table 3: Growth of the Foreign Born Population, 2006 and 2014..... 13
- Table 4: Percent of the Metro’s Foreign Born Residents Living in the Primary City, 2014 ..... 14
- Table 5: Age and Dependency, 2014..... 15
- Table 6: Highest Degree Attained by Adults Over the Age of 25, 2014..... 17
- Table 7: Disparity in Educational Attainment Between the Metro Area and Its Primary City, 2014..... 18
- Table 8: Median Household Income, 2010 and 2014 ..... 20
- Table 9: Median Household Income, Primary City versus the Metropolitan Area, 2014 ..... 21
- Table 10: Per Capita Income, 2010–2014 ..... 23
- Table 11: Poverty Status, 2014 ..... 24
- Table 12: People Living Below Poverty, Primary City versus Metropolitan Area, 2014..... 25
- Table 13: Homeownership Rates, 2006–2013..... 26
- Table 14: Urban Parkland, 2014 ..... 29
- Table 15: City Spending on Urban Parks and Recreation, 2014 ..... 30
- Table 16: Change in the Number of Days With an Unhealthy Air Quality Index, 2005 and 2014 ..... 35
- Table 17: Clean Jobs, 2010 ..... 36
- Table 18: Median Housing Value, 2010–2014 ..... 39
- Table 19: Owner-Occupied Housing Costs, 2014..... 40
- Table 20: Rental Housing Costs, 2014 ..... 41

- Table 21: Median Sales Price of Single-Family Homes, 2012 and 2014 ..... 42
- Table 22: Percentage of Income Spent on Housing plus Transportation Costs, 2015 ..... 43
- Table 23: Consumer Price Index, 2005 and 2014 ..... 44
- Table 24: Percentage of Violent Crimes Occurring in the Primary City versus the Percentage of the MSA Population Living in the City, 2013.. 47
- Table 25: Education and Knowledge Creation Workers, 2010..... 49
- Table 26: Residents per Health Care Worker by Type of Worker, 2010 ..... 51
- Table 27: Total Governments, 2012 ..... 52
- Table 28: Total Employment, 2004 and 2014..... 55
- Table 29: Employment by Industry Sector, 2013..... 56
- Table 30: Employment by Occupation, 2014..... 57
- Table 31: Over-the-Year Change in Unemployment, 2014–2015 ..... 59
- Table 32: Average Earnings per Job, 2004 and 2014 ..... 61
- Table 33: Per Capita Personal Income, 2004 and 2014..... 61
- Table 34: Office Market Statistics, 2015 ..... 63
- Table 35: Industrial Market Statistics, 2015..... 63
- Table 36: Housing Units Authorized by Residential Building Permits, 2010–2014 ..... 65
- Table 37: Residential Mortgage Foreclosure Rates, 2013 ..... 65
- Table 38: Gross Domestic Product (GDP), 2004 and 2014 ..... 66
- Table 39: Per Capita Gross Domestic Product (GDP), 2004 and 2014 ..... 67
- Table 40: Fortune 500 Headquarters and Large Companies, 2014 ..... 68
- Table 41: Exports, 2013..... 69
- Table 42: Innovation Index, 2010 ..... 71



- Table 43: Academic Research and Development Expenditures, 2011.....72
- Table 44: Venture Capital Investments, 2015 versus 2010 .....72
- Table 45: Households with Access to the Internet .....74
- Table 46: Most Literate Cities, 2013 .....74
- Table 47: Mode of Transportation to Work, 2014.....78
- Table 48: Average Daily Vehicle Miles Traveled (DVMT) Per Capita and Average Daily Traffic (ADT) per Freeway Lane Mile, 2012 .....80
- Table 49: Congestion Indicators, 2014 .....81
- Table 50: Annual Unlinked Transit Trips and Transit Passenger Miles, 2013 .....82
- Table 51: Total Combined Tonnage of Domestic and Foreign Maritime Trade, 2003 and 2013.....83
- Table 52: Annual Airport Passenger Volume, 2014 .....85
- Table 53: Dominant Airline Carrier Share, 2014 .....86

***Appendices***

- Appendix A: Component Counties, Principal Cities, and Primary Cities of Metropolitan Statistical Areas
- Appendix B: 2015 Metropolitan Statistical Area (MSA) Population Estimates





# INTRODUCTION

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## INTRODUCTION

Greater Philadelphia is one of the nation's largest labor, housing, and sales markets. In order to compete effectively, the region must compare itself against the nation's other large metropolitan areas, in order to identify its strengths and challenges. *Rating the Region* provides an objective, quantifiable analysis of the relative strengths and weaknesses of the Philadelphia region. Existing conditions and trends of the region are measured against other metropolitan regions around the country, by using data from the Census Bureau, other Federal agencies, and other research organizations. This effort will allow the region to identify how to best capitalize and build on its strengths while recognizing and working to resolve its weaknesses.

In 1993, the Delaware Valley Regional Planning Commission (DVRPC) published the first *Rating the Region* report, which compared the Philadelphia metropolitan statistical area (MSA) to the nation's nine other largest metros, plus Pittsburgh and Baltimore as regional competitors. That report found that Greater Philadelphia had one of the nation's most diverse economies; low unemployment; a low poverty rate; affordable housing; relatively low taxes; short average commute times; and a multitude of colleges, universities, and hospitals.

The original report was followed by a second *Rating the Region* analysis, completed in 2007. The 2007 report again compared the Philadelphia MSA to the nation's nine other largest metros, plus Baltimore and Pittsburgh. Compared to other large metropolitan areas, Greater Philadelphia continued to offer a diverse economy, affordable housing, a quality transportation network, short commute times, major airport and port facilities, a large number of colleges and universities, and an extensive health care network.

The current report uses the federal Office of Management and Budget's (OMB's) MSA definitions as the geographic base for data

from the U.S. Census Bureau and other federal agencies, as did the 1993 and 2007 reports. OMB's metropolitan areas are defined as having one or more urbanized cores of at least 50,000 people, plus adjacent areas that have a high degree of social and economic integration with the core as evidenced by commuting ties. These definitions provide a consistent geographic definition for all federal agencies to tabulate and publish data, and are the smallest area for which the greatest amount of data is available.

The report uses the definitions of MSAs released by the OMB in February 2013. Unlike the first two reports, the current report has been expanded to compare the nation's 25 largest metro areas (as of July 2014). The full name and component counties of the MSAs discussed in this report are detailed in Appendix A. The name of each MSA typically consists of the names of up to three of its principal cities and the name of each state into which the area extends.



*The Philadelphia Region*

The largest city in each MSA is designated by the U.S. Census Bureau as a "principal city". Additional cities within each MSA may also qualify as principal cities if they are incorporated or census-designated places that have a population of at least 250,000, with employment of at least 100,000; places with a population between 50,000 and 250,000, where the number of workers working in the place exceeds the number of resident workers; or places with a population between 10,000 and 50,000, where the number of workers working in the place exceeds the number of resident workers and that have at least one-third the population of the largest principal city.

For the purposes of this report, each metro area's largest principal city is referred to as its "primary city". Appendix A includes the principal cities of each of the MSAs (as defined by OMB), with the MSA's primary city illustrated in bold italics.

DVRPC's nine-county region is covered by two separate MSAs:

- the Philadelphia-Camden-Wilmington, PA-NJ-DE MSA (which includes DVRPC's member counties of Bucks, Chester, Delaware, Montgomery, and Philadelphia in Pennsylvania and Burlington, Camden, and Gloucester in New Jersey, plus New Castle County, Delaware; Salem County, New Jersey; and Cecil County, Maryland; and
- the Trenton-Ewing, NJ MSA, which includes only Mercer County, New Jersey.

Since much of the data analyzed in this report was available only at the MSA level, data for the Trenton-Ewing MSA, much smaller in population and land area than the Philadelphia MSA, is considered separately in many of the following tables. The most recently available data, including information from the 2014 American Community Survey, was reviewed. In addition to data for the metropolitan areas, comparable data was collected for the primary city for several of the variables, and is discussed in the report as appropriate. The results

indicate the advantages of the Greater Philadelphia region and, likewise, those areas most in need of improvement.

The report begins with a section on demographics. This section is followed by indicators and a discussion of each metro area's environmental and natural resources; livable communities; economy; and transportation system.

Note: On March 24, 2016 (after the data analysis for this report had been finalized), the U.S. Census Bureau released county and MSA population estimates for July 2015. Based on these most recent estimates, the Philadelphia metro is now the 7<sup>th</sup> most populous MSA, having been passed by the Washington, DC metro area between 2014 and 2015. The Pittsburgh MSA had dropped to 26<sup>th</sup>, with Florida's Orlando-Kissimmee-Sanford MSA moving in to the top 25 (ranking 24<sup>th</sup>). The 2015 population estimates are listed in Appendix B, but were not used for analysis and comparison for this report.



*Philadelphia's Benjamin Franklin Bridge*



# DEMOGRAPHICS

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## DEMOGRAPHICS

Figure 1 illustrates population change within each metropolitan area between 2005 and 2014, and Table 1 provides data on the population in each of the 25 largest metro areas and the percentage change since 2005. Table 1 also includes the population and percentage change in each metro area's primary city.

As of July 2014, the Philadelphia metro was the sixth largest MSA in the country, having increased its population by almost 7 percent between 2005 and 2014. Although eighth lowest among the metropolitan areas studied, and small compared to the fast-growing Sunbelt cities, this growth rate is nonetheless positive. Fast-growing regions include Houston, San Antonio, Charlotte, and Dallas-Fort Worth. Population growth in both the Philadelphia MSA and the Trenton-Ewing MSA area is comparable to Boston's. The region's population grew at a faster rate than did that of Baltimore, New York, Los Angeles, St. Louis, and Chicago, while two metro areas (Pittsburgh and Detroit) experienced population losses.

Figure 2 illustrates population growth in each region's primary city. When comparing the population change in the regions' principal cities, Philadelphia fared better than some other large cities. While significantly lower than fast growing cities such as Charlotte; Washington, DC; and Denver, the population of the City of Philadelphia grew by more than 7 percent between 2005 and 2014, a rate comparable to that of Minneapolis, and higher than that of Dallas, Phoenix, New York, and Los Angeles.

Several older cities continued to lose population over the decade, including Baltimore, Atlanta, Pittsburgh, Chicago, St. Louis, and Detroit. Like Philadelphia, the City of Trenton (the primary city in the Trenton-Ewing MSA and one of DVRPC's member governments) gained residents, with an increase of 8 percent.

Within DVRPC's nine-county region, growth rates vary significantly by county, as is typical in most major metropolitan areas. DVRPC has forecast an increase of 11 percent in the nine-county region's population between 2010 and 2040, ranging from a 2 percent increase in Delaware County, Pennsylvania (home to the region's older first generation suburbs) to 30 percent increases in Chester County, Pennsylvania, and Gloucester County, New Jersey (the region's fastest-growing suburban counties).

As noted in the report's introduction, on March 24, 2016 (after the data analysis for this report had been finalized), the U.S. Census Bureau released county and MSA population estimates for July 2015. Based on these most recent estimates, the Philadelphia metro is now the 7<sup>th</sup> most populous MSA, having been passed by the Washington, DC metro area between 2014 and 2015.

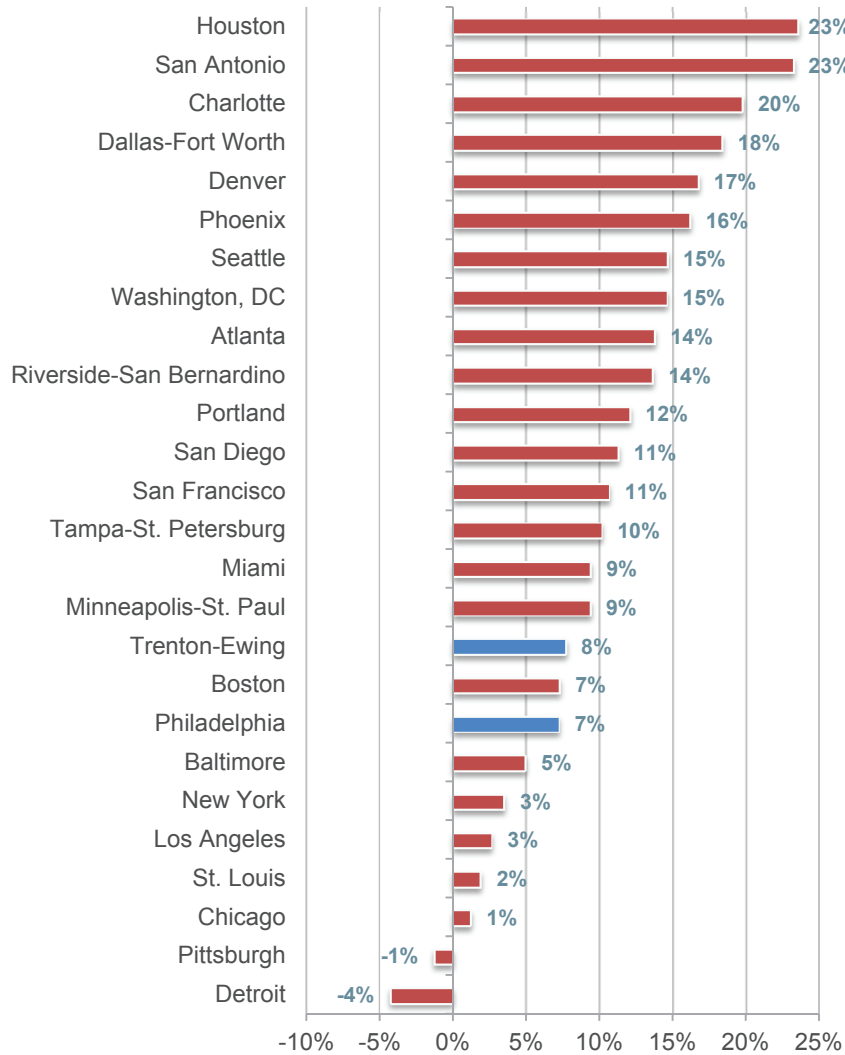


**TABLE 1: POPULATION, 2005–2014**

METROPOLITAN AREA	MSA POPULATION		CHANGE 2005-2014		PRIMARY CITY POPULATION		CHANGE 2005-2014	
	2005	2014	Percent	Rank	2005	2014	Percent	Rank
New York	19,415,655	20,092,883	3%	21 <sup>st</sup>	8,143,197	8,491,079	4%	19 <sup>th</sup>
Los Angeles	12,923,547	13,262,220	3%	22 <sup>nd</sup>	3,844,829	3,928,864	2%	20 <sup>th</sup>
Chicago	9,443,356	9,554,598	1%	24 <sup>th</sup>	2,842,518	2,722,389	-4%	23 <sup>rd</sup>
Dallas-Fort Worth	5,876,565	6,954,330	18%	4 <sup>th</sup>	1,213,825	1,281,047	6%	17 <sup>th</sup>
Houston	5,255,432	6,490,180	23%	1 <sup>st</sup>	2,016,582	2,239,558	11%	9 <sup>th</sup>
<b>Philadelphia</b>	<b>5,644,383</b>	<b>6,051,170</b>	<b>7%</b>	<b>19<sup>th</sup></b>	<b>1,463,281</b>	<b>1,560,297</b>	<b>7%</b>	<b>16<sup>th</sup></b>
Washington, DC	5,266,760	6,033,737	15%	7 <sup>th</sup>	550,521	658,893	20%	2 <sup>nd</sup>
Miami	5,422,200	5,929,819	9%	15 <sup>th</sup>	386,417	430,332	11%	10 <sup>th</sup>
Atlanta	4,935,837	5,614,323	14%	9 <sup>th</sup>	470,688	456,002	-3%	22 <sup>nd</sup>
Boston	4,411,835	4,732,161	7%	18 <sup>th</sup>	559,034	655,884	17%	4 <sup>th</sup>
San Francisco	4,152,688	4,594,060	11%	12 <sup>th</sup>	739,426	852,469	15%	7 <sup>th</sup>
Phoenix	3,865,077	4,489,109	16%	6 <sup>th</sup>	1,461,575	1,537,058	5%	18 <sup>th</sup>
Riverside-San Bernardino	3,909,954	4,441,890	14%	10 <sup>th</sup>	290,086	319,504	10%	11 <sup>th</sup>
Detroit	4,488,335	4,296,611	-4%	26 <sup>th</sup>	886,671	680,250	-23%	26 <sup>th</sup>
Seattle	3,203,314	3,671,478	15%	8 <sup>th</sup>	573,911	668,342	16%	5 <sup>th</sup>
Minneapolis-St. Paul	3,196,618	3,495,176	9%	16 <sup>th</sup>	372,811	407,207	9%	14 <sup>th</sup>
San Diego	2,933,462	3,263,431	11%	13 <sup>th</sup>	1,255,540	1,381,069	10%	12 <sup>th</sup>
Tampa-St. Petersburg	2,647,658	2,915,582	10%	14 <sup>th</sup>	325,989	358,699	10%	13 <sup>rd</sup>
St. Louis	2,754,288	2,806,207	2%	23 <sup>rd</sup>	344,362	317,419	-8%	25 <sup>th</sup>
Baltimore	2,655,675	2,785,874	5%	20 <sup>th</sup>	635,815	622,793	-2%	21 <sup>st</sup>
Denver	2,359,994	2,754,258	17%	5 <sup>th</sup>	557,917	663,862	19%	3 <sup>rd</sup>
Charlotte	1,988,130	2,380,314	20%	3 <sup>rd</sup>	610,949	809,958	33%	1 <sup>st</sup>
Pittsburgh	2,386,074	2,355,968	-1%	25 <sup>th</sup>	316,718	305,412	-4%	24 <sup>th</sup>
Portland	2,095,861	2,348,247	12%	11 <sup>th</sup>	533,427	619,360	16%	6 <sup>th</sup>
San Antonio	1,889,797	2,328,652	23%	2 <sup>nd</sup>	1,256,509	1,436,697	14%	8 <sup>th</sup>
<b>Trenton-Ewing</b>	<b>345,118</b>	<b>371,532</b>	<b>8%</b>	<b>17<sup>th</sup></b>	<b>77,471</b>	<b>84,047</b>	<b>8%</b>	<b>15<sup>th</sup></b>

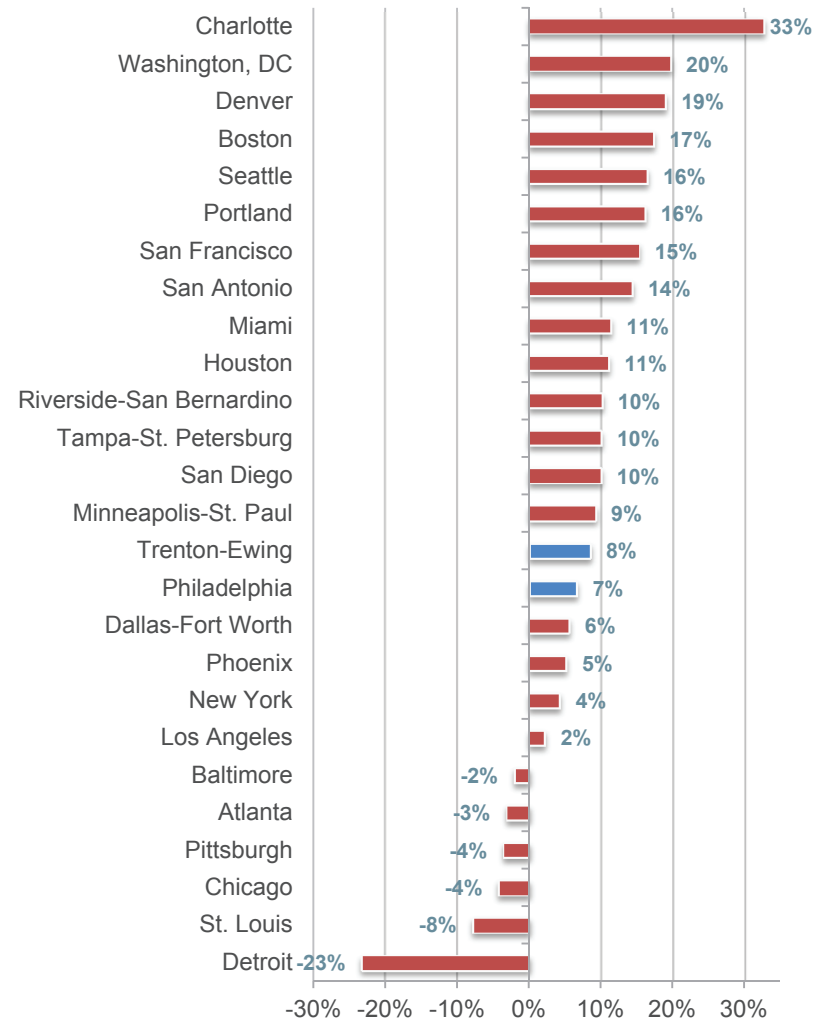
Source: U.S. Census Bureau, American Community Survey 2005 and 2014 One-Year Estimates. Full names and the component counties of the metropolitan statistical areas (MSAs) are listed in Appendix A, as well as each MSA's principal city (with their "primary city" noted in bold italics).

**FIGURE 1: POPULATION CHANGE IN THE MSA, 2005–2014**



Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates.

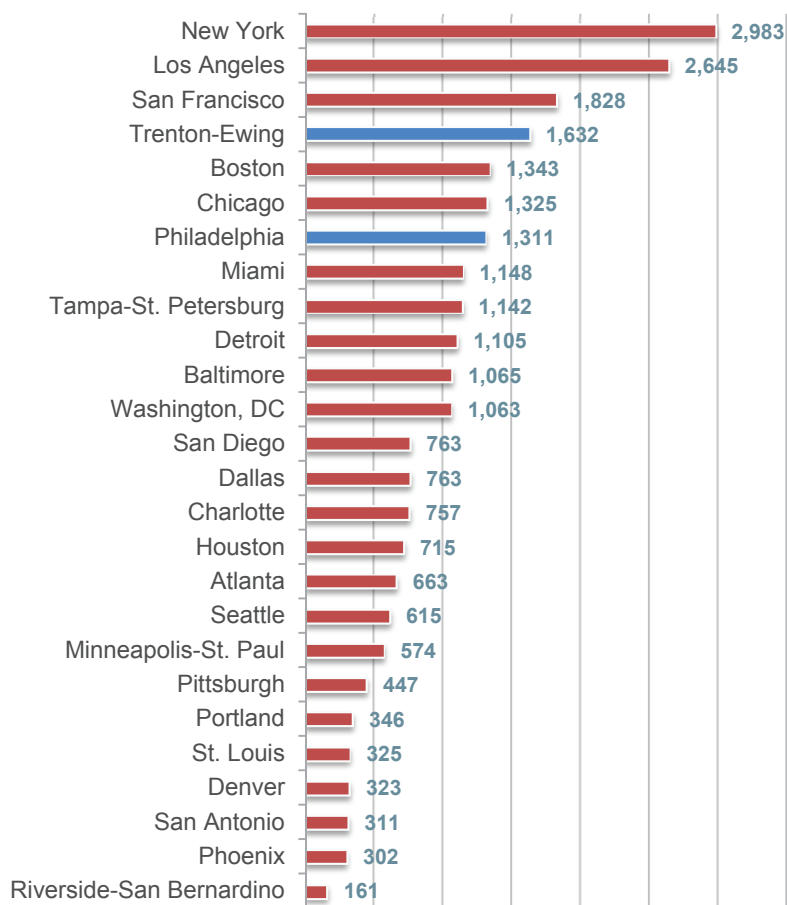
**FIGURE 2: POPULATION CHANGE IN THE PRIMARY CITY, 2005–2014**



Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates.

Figure 3 illustrates the population density in each metropolitan area. The Philadelphia metro is the seventh densest metro area (sixth densest among the 25 largest metros studied); the Trenton-Ewing MSA is the fourth densest area, behind only New York, Los Angeles, and San Francisco.

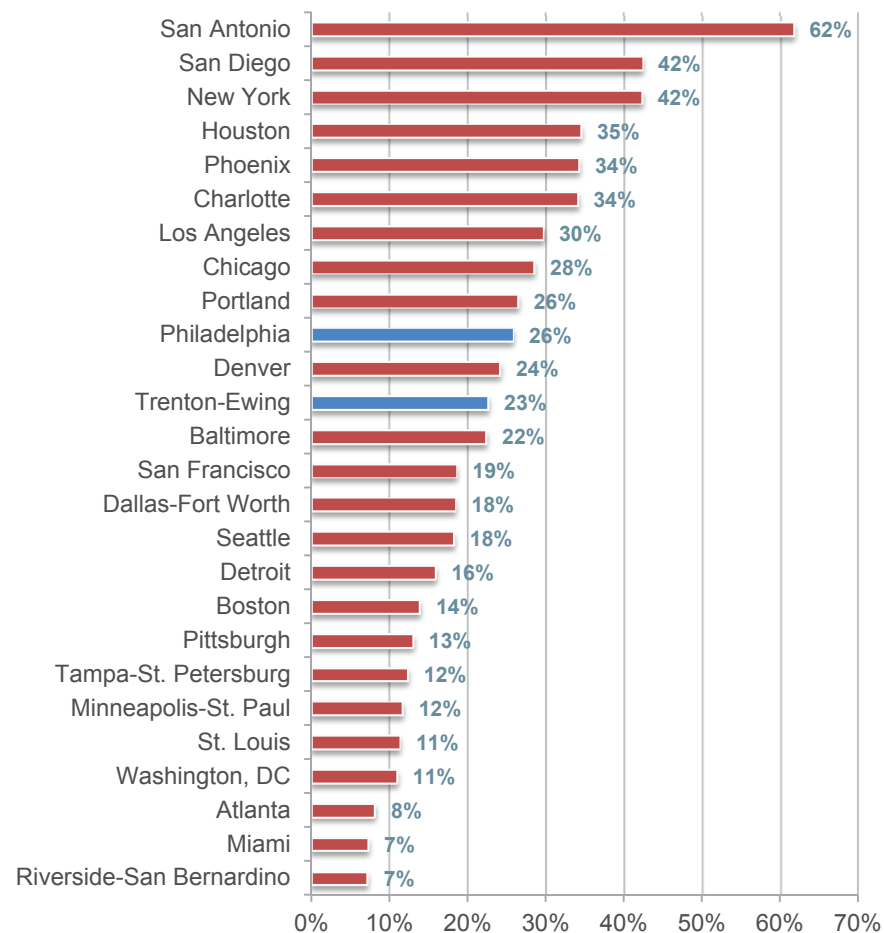
**FIGURE 3: PERSONS PER SQUARE MILE, 2014**



Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates.

Figure 4 illustrates the percentage of each region's population living in the primary city. Over 26 percent of the Philadelphia metro's population lives in the City of Philadelphia, the 10<sup>th</sup> highest share. In the Trenton-Ewing MSA, 23 percent of the population lives in the City of Trenton.

**FIGURE 4: PERCENTAGE OF THE POPULATION LIVING IN THE PRIMARY CITY, 2014**



Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates.

## ***Race and Ethnicity***

As illustrated in Table 2, 63 percent of the population in the Philadelphia region was both White and non-Hispanic in 2014, down from over 70 percent less than a decade earlier. This is largely the result of growth in the Hispanic population, as is the case nationally.

Table 2 ranks the metro areas by the absolute difference between the percent of minority residents in the primary city versus the metro area as a whole. For the purpose of this analysis, “minority resident” is defined as anyone who is any race except White or is both White and Hispanic.

In most metros, higher percentages of minority residents live in the primary cities, although in some, including San Antonio and Riverside, the primary city has a lower percentage of minority residents than does the metro as a whole. Both the Philadelphia and Trenton-Ewing metros have a disproportionately high number of minority residents living in their primary cities. Among metro areas where minorities are concentrated in the primary cities, Trenton-Ewing ranks second highest in this disparity (behind only Detroit), and Philadelphia ranks fifth, behind Detroit, Trenton, Portland, and Baltimore.

## ***National Origin***

Over the last two decades, immigrants have played an important role in offsetting population declines in many U.S. cities. The Philadelphia metro is home to more than 620,000 immigrants, who comprise approximately 10 percent of the population. An additional 77,000 foreign-born residents live in the Trenton-Ewing MSA, approximately 21 percent of its population.

The percentage of foreign born residents in Philadelphia is the seventh lowest of the metro areas studied, as illustrated in Figure 5. As indicated in Table 3, however, the percentage of foreign born residents in the MSA grew at the 7<sup>th</sup> highest rate between 2006 and 2014.

Table 4 compares the percentage of each region’s foreign-born population living in its primary city to the percentage of the overall population living in each city. In most of the metro areas, the foreign-born population is more heavily concentrated in the primary city than in the suburbs; in only five metro areas is the percentage of foreign-born residents in the city comparable to or higher than the percentage of the regional population.

In Philadelphia, 31 percent of the metro’s foreign-born residents live in the City of Philadelphia, as compared to 26 percent of the total metro population. In the Trenton-Ewing MSA, the foreign-born population is more evenly distributed, with 26 percent of the foreign born residents living in the City of Trenton versus 23 percent of the metro area’s overall population.

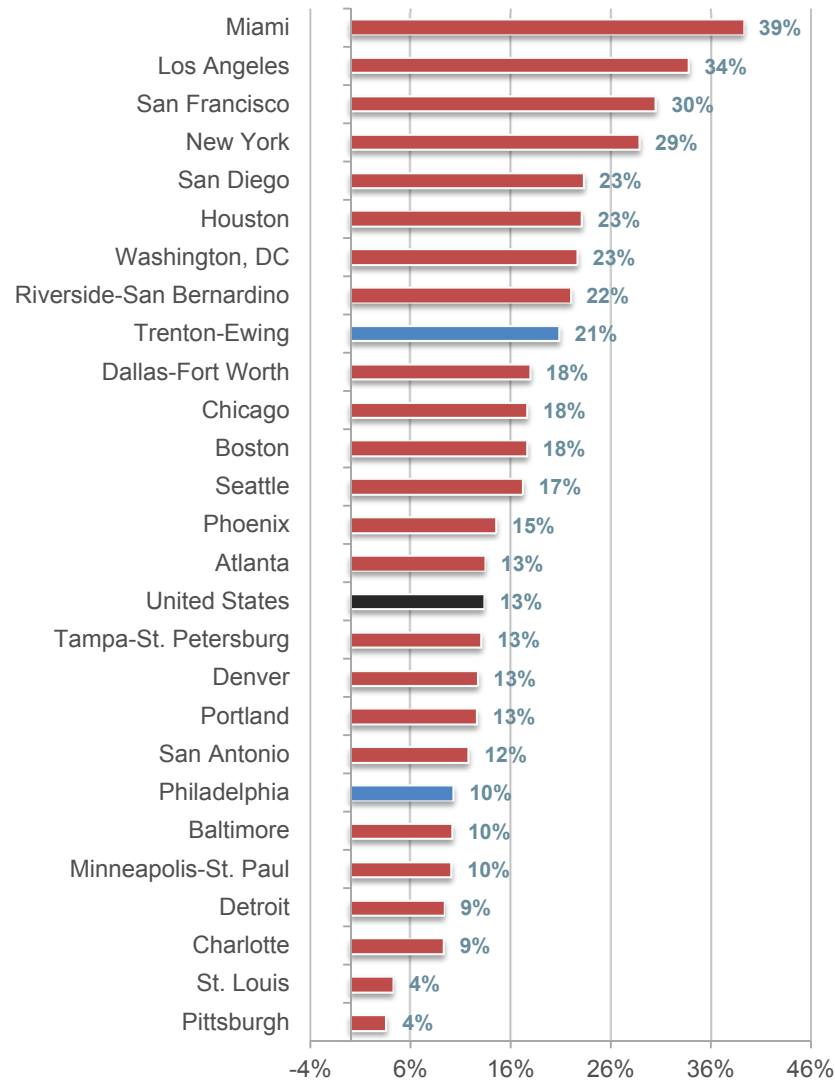


**TABLE 2: RACE AND ETHNICITY, 2014**

METROPOLITAN AREA	PERCENTAGE IN THE METRO AREA					DISPARITY IN PERCENTAGE MINORITY, CITY VERSUS METRO			
	White Not Hispanic	Black Not Hispanic	Asian Not Hispanic	Another Race or Two or More Races, Not Hispanic	Hispanic or Latino (Any Race)	Metro Area	Primary City	Difference (City versus Metro Area)	Rank (Based on Absolute Difference Between the City and the Metro)
New York	47%	16%	11%	2%	24%	53%	54%	1%	1 <sup>st</sup>
Dallas-Fort Worth	48%	15%	6%	3%	28%	52%	50%	-2%	2 <sup>nd</sup>
Seattle	66%	5%	12%	7%	10%	34%	29%	-5%	3 <sup>rd</sup>
St. Louis	74%	3%	6%	5%	12%	26%	21%	-5%	4 <sup>th</sup>
Tampa-St. Petersburg	65%	11%	3%	3%	18%	35%	40%	5%	5 <sup>th</sup>
Miami	32%	20%	3%	2%	43%	68%	62%	-6%	6 <sup>th</sup>
San Diego	46%	25%	10%	4%	15%	54%	61%	7%	7 <sup>th</sup>
Houston	38%	17%	7%	2%	36%	62%	55%	-7%	8 <sup>th</sup>
Chicago	53%	17%	6%	2%	22%	47%	55%	8%	9 <sup>th</sup>
San Francisco	41%	7%	25%	5%	22%	59%	51%	-8%	10 <sup>th</sup>
Minneapolis-St. Paul	77%	8%	6%	3%	6%	23%	32%	9%	11 <sup>th</sup>
Atlanta	49%	34%	5%	2%	10%	51%	61%	10%	12 <sup>th</sup>
Charlotte	62%	22%	3%	3%	10%	38%	49%	11%	13 <sup>th</sup>
Denver	65%	5%	4%	3%	23%	35%	23%	-12%	14 <sup>th</sup>
Washington, DC	47%	5%	11%	4%	33%	53%	38%	-15%	15 <sup>th</sup>
Boston	73%	7%	7%	3%	10%	27%	44%	17%	16 <sup>th</sup>
Pittsburgh	86%	8%	2%	2%	2%	14%	33%	19%	17 <sup>th</sup>
Phoenix	57%	5%	4%	4%	30%	43%	23%	-20%	18 <sup>th</sup>
<b>Philadelphia</b>	<b>63%</b>	<b>20%</b>	<b>6%</b>	<b>2%</b>	<b>9%</b>	<b>37%</b>	<b>58%</b>	<b>21%</b>	<b>19<sup>th</sup></b>
Los Angeles	30%	6%	15%	3%	46%	70%	45%	-25%	20 <sup>th</sup>
Baltimore	58%	29%	5%	3%	5%	42%	71%	29%	21 <sup>st</sup>
Portland	75%	18%	2%	2%	3%	25%	56%	31%	22 <sup>nd</sup>
<b>Trenton-Ewing</b>	<b>52%</b>	<b>20%</b>	<b>10%</b>	<b>2%</b>	<b>16%</b>	<b>48%</b>	<b>79%</b>	<b>31%</b>	<b>23<sup>rd</sup></b>
Riverside-San Bernardino	34%	7%	6%	3%	50%	66%	34%	-32%	24 <sup>th</sup>
San Antonio	35%	6%	2%	2%	55%	65%	28%	-37%	25 <sup>th</sup>
Detroit	67%	22%	4%	3%	4%	33%	91%	58%	26 <sup>th</sup>

Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates. For the purposes of this report, “minority” includes anyone who is any race except White or is both White and Hispanic. Metros are listed in order of the absolute difference between the percentage minority in the metro area and the primary city.

**FIGURE 5: PERCENTAGE FOREIGN BORN, 2014**



Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates.

**TABLE 3: GROWTH OF THE FOREIGN BORN POPULATION, 2006 AND 2014**

METROPOLITAN AREA	FOREIGN BORN		GROWTH OF FOREIGN BORN POPULATION 2006–2014		GROWTH OF THE TOTAL POPULATION 2006–2014	
	2006	2014	Percent	Rank	Percent	Rank
Charlotte	146,269	221,370	51%	1 <sup>st</sup>	50%	1 <sup>st</sup>
Baltimore	200,349	281,972	41%	2 <sup>nd</sup>	5%	19 <sup>th</sup>
San Antonio	207,907	273,420	32%	3 <sup>rd</sup>	19%	2 <sup>nd</sup>
Washington, DC	1,063,033	1,362,763	28%	4 <sup>th</sup>	14%	5 <sup>th</sup>
Houston	1,193,931	1,498,072	25%	5 <sup>th</sup>	17%	3 <sup>rd</sup>
Minneapolis	282,017	352,254	25%	6 <sup>th</sup>	10%	10 <sup>th</sup>
Philadelphia	504,317	620,158	23%	7 <sup>th</sup>	4%	20 <sup>th</sup>
Seattle	516,941	630,389	22%	8 <sup>th</sup>	13%	7 <sup>th</sup>
Boston	706,586	832,708	18%	9 <sup>th</sup>	6%	18 <sup>th</sup>
Pittsburgh	71,516	84,219	18%	10 <sup>th</sup>	-1%	24 <sup>th</sup>
Dallas	1,078,552	1,243,764	15%	11 <sup>th</sup>	16%	4 <sup>th</sup>
Miami	2,023,711	2,322,794	15%	12 <sup>th</sup>	9%	14 <sup>th</sup>
Tampa	334,981	380,338	14%	13 <sup>th</sup>	8%	16 <sup>th</sup>
San Francisco	1,235,778	1,398,127	13%	14 <sup>th</sup>	10%	11 <sup>th</sup>
Atlanta	665,297	751,859	13%	15 <sup>th</sup>	9%	15 <sup>th</sup>
<b>United States</b>	<b>37,547,789</b>	<b>42,391,794</b>	<b>13%</b>	<b>---</b>	<b>6%</b>	<b>---</b>
Denver	311,174	348,936	12%	16 <sup>th</sup>	14%	6 <sup>th</sup>
Portland	264,381	295,627	12%	17 <sup>th</sup>	10%	12 <sup>th</sup>
San Diego	686,117	757,937	10%	18 <sup>th</sup>	11%	8 <sup>th</sup>
St. Louis	108,794	118,936	9%	19 <sup>th</sup>	0%	22 <sup>nd</sup>
New York	5,304,270	5,791,236	9%	20 <sup>th</sup>	7%	17 <sup>th</sup>
Riverside	898,235	974,210	8%	21 <sup>st</sup>	10%	13 <sup>th</sup>
Detroit	378,304	401,917	6%	22 <sup>nd</sup>	-4%	25 <sup>th</sup>
Los Angeles	4,432,288	4,473,597	1%	23 <sup>rd</sup>	2%	21 <sup>st</sup>
Chicago	1,695,417	1,685,654	-1%	24 <sup>th</sup>	0%	23 <sup>rd</sup>
Phoenix	682,787	652,266	-4%	25 <sup>th</sup>	11%	9 <sup>th</sup>

Source: U.S. Census Bureau, American Community Survey One-Year Estimates. Comparable data is not available for the Trenton-Ewing metro area.

**TABLE 4: PERCENT OF THE METRO'S FOREIGN BORN RESIDENTS LIVING IN THE PRIMARY CITY, 2014**

METROPOLITAN AREA	PERCENT LIVING IN THE PRIMARY CITY		DIFFERENCE
	Metro's Foreign Born Residents	Metro's Total Population	
Seattle	18%	18%	0%
Riverside-San Bernardino	7%	7%	0%
San Francisco	21%	19%	2%
Tampa-St. Petersburg	14%	12%	2%
<b>Trenton-Ewing</b>	<b>26%</b>	<b>23%</b>	<b>3%</b>
Portland	29%	26%	3%
Los Angeles	33%	30%	3%
Miami	10%	7%	3%
Atlanta	4%	8%	-4%
Washington, DC	7%	11%	-4%
<b>Philadelphia</b>	<b>31%</b>	<b>26%</b>	<b>5%</b>
San Diego	47%	42%	5%
Baltimore	17%	22%	-5%
Minneapolis-St. Paul	17%	12%	5%
Denver	29%	24%	5%
Chicago	34%	28%	6%
Dallas-Fort Worth	24%	18%	6%
Houston	41%	35%	6%
Detroit	9%	16%	-7%
St. Louis	18%	11%	7%
Boston	21%	14%	7%
San Antonio	72%	62%	10%
New York	54%	42%	12%
Phoenix	46%	34%	12%
Pittsburgh	27%	13%	14%
Charlotte	53%	34%	19%

Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates. Listed in order of the absolute difference between the percentage of the foreign born and the total MSA population living in the primary city.

### *Age and Dependency*

As of 2014, the Philadelphia region had the ninth highest median age of the 26 areas studied, as indicated in Table 5. Also included in Table 5 is each metro area's age-dependency ratio, a measure created by the U.S. Census Bureau and calculated by dividing the combined number of residents under 18 years and residents age 65 years and over by the population between the ages of 18 and 64, and multiplying by 100. Philadelphia's age dependency ratio is comparable to that of Houston, and lower than in ten other metros, including Phoenix, Tampa, Riverside, San Antonio, St. Louis, Miami, Detroit, Pittsburgh, Charlotte, and Dallas.

Table 5 also provides the percentage of each region's population who are baby boomers (defined for the purposes of this analysis as people who were between the ages of 50 and 69 in 2014) and millennials (people between the ages of 15 and 34 in 2014). Changing demographics will have a profound impact on lifestyle preferences and travel trends in coming years, and are of special concern to land use and transportation planners and policy makers.

The Philadelphia region is home to a significant number of baby boomers. Today's baby boomers are different from previous generations of elderly: not only are there more of them than ever before, but they are also more diverse and mobile, and expect a range of housing and transportation options that will keep them independent and living at home for as long as possible. While some may prefer to live in the region's centers as they become empty-nesters, most expect to remain in the auto-dependent suburbs where they have spent most of their life. As people age, one of the greatest barriers to independence is mobility. Over time, the ability to drive safely decreases, and accessing goods and services can become difficult, especially in sprawling suburban areas with segregated land uses and limited alternatives to the automobile. This presents a challenge to planners and service providers.



**TABLE 5: AGE AND DEPENDENCY, 2014**

METROPOLITAN AREA	MEDIAN AGE	AGE DEPENDENCY RATIO	BABY BOOMERS	MILLENNIALS
Riverside	33.8	62.9	21%	30%
Houston	34.0	58.3	21%	29%
San Antonio	34.4	61.2	22%	29%
Dallas-Fort Worth	34.5	58.7	21%	28%
San Diego	35.3	53.9	22%	31%
Atlanta	35.8	56.7	22%	28%
Phoenix	35.9	64.5	22%	28%
Denver	36.1	54.9	23%	28%
Los Angeles	36.1	54.4	22%	30%
Washington, DC	36.4	53.1	23%	29%
Minneapolis-St. Paul	36.6	57.3	24%	28%
Chicago	36.8	57.4	23%	28%
Seattle	36.9	52.4	24%	28%
Charlotte	37.1	58.8	23%	27%
<b>United States</b>	<b>37.4</b>	<b>59.3</b>	<b>24%</b>	<b>27%</b>
Portland	37.7	55.8	24%	27%
New York	37.9	56.5	24%	28%
Baltimore	38.2	56.9	25%	28%
Philadelphia	38.3	58.3	24%	27%
Trenton-Ewing	38.4	55.5	25%	29%
San Francisco	38.6	52.4	24%	28%
Boston	38.7	53.7	24%	27%
St. Louis	39.0	60.4	25%	25%
Detroit	39.9	60.3	26%	26%
Miami	40.5	60.4	24%	26%
Tampa-St. Petersburg	42.1	64.5	26%	25%
Pittsburgh	43.0	60.3	28%	25%

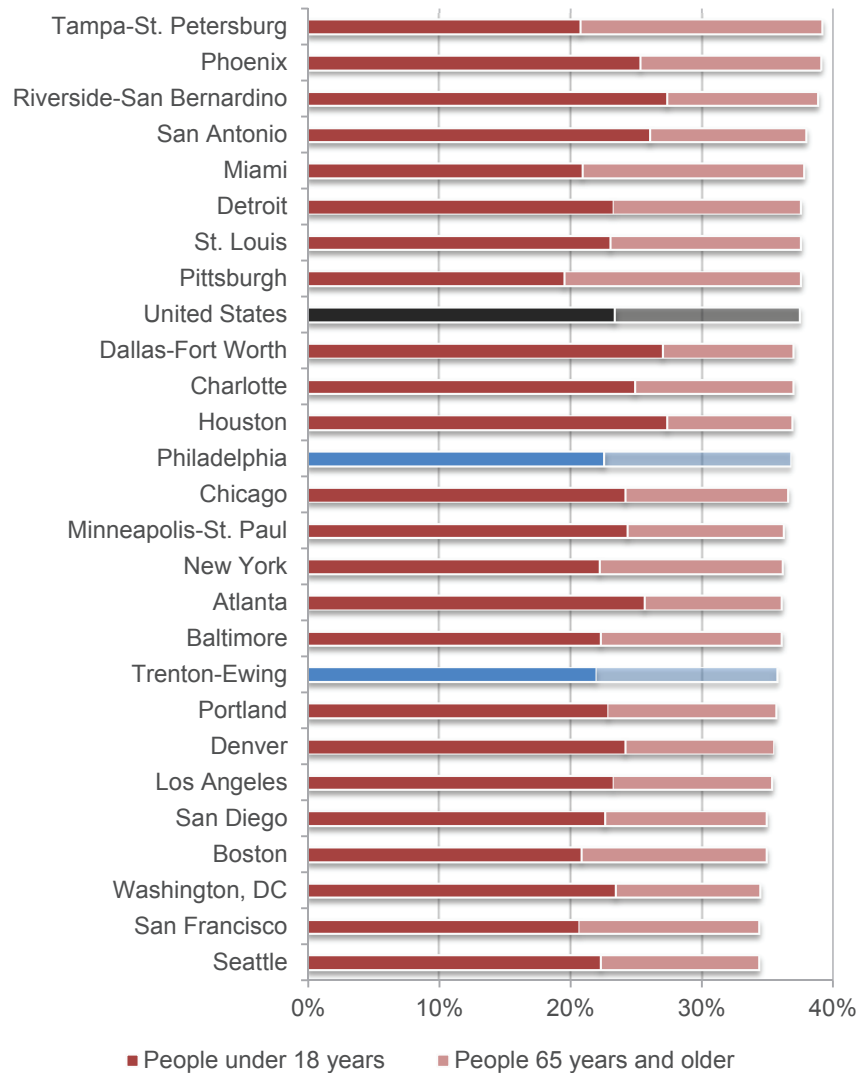
Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates. The age-dependency ratio equals the number of residents under 18 years plus residents 65 years and over divided by the population between the ages of 18 and 64. Baby boomers are people between the ages of 50 and 69 years in 2014; millennials are between the ages of 15 and 34.

Millennials comprise approximately 29 percent of the Trenton-Ewing metro’s population (4th highest among the metros studied, and higher than the national average), and 27 percent of the Philadelphia metro area’s population. This group is tech-savvy, often shopping and banking online and communicating with friends via text, e-mail, and Skype. Their travel habits are different than previous generations: they typically drive less; are more likely to use public transit, walk, or bike; and are more likely to prefer to live in compact, walkable places.

Figure 6 illustrates the percentage of each metro area’s population that is dependent, defined as persons under 18 years, or 65 years or older. At over 37 percent in 2014, the percentage of dependent residents in the Philadelphia metro is average among the metro areas studied and comparable to the national average. In many metros, including Riverside-San Bernardino, Houston, and Dallas, a higher share of the dependent population is related to higher percentages of children. The Philadelphia metro, however, is home to fewer children but a relatively high number of elderly residents; 14 percent of its population was over the age of 65 in 2014, a percentage comparable to Detroit and exceeded in only Tampa, Pittsburgh, Miami, and St. Louis.



**FIGURE 6: DEPENDENT POPULATION, 2014**



Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates.

### *Educational Attainment*

Table 6 provides data on the highest educational degree obtained by residents who are 25 years and older in each of the metropolitan areas. As of 2014, over 35 percent of the Philadelphia region’s adults age 25 and older had completed at least four years of college, ranking 14th among the 26 metropolitan areas studied. Conversely, only 10 percent of the region’s adults had not completed high school, 10th lowest of the metros.

While the percentages of high school and college graduates have generally improved during the last decade, and meet or exceed the national average in most of the major metros, the greatest challenges remain in the urban areas, where SAT scores and high school and college graduation rates are significantly lower than statewide or regional averages. As indicated in Table 7, in the City of Philadelphia in 2014, almost 19 percent of adults had not completed high school, compared to less than 10 percent in the region overall.

In Philadelphia, this disparity between the percent of students who fail to complete high school in the primary city versus the MSA as a whole is third highest among the metro areas studied, lower than only Detroit and Trenton-Ewing. The significant percentage difference in Trenton is likely due to the fact that the Trenton MSA is comprised of a single county with 13 separate municipalities, and, with limited land area, is home to fewer more highly-educated suburban residents to counter the lower educational attainment in the City of Trenton.

Interestingly, the percentage of residents of the City of Philadelphia with at least a bachelor’s degree is higher than in the metro area as a whole, with a ratio lower than only Portland and similar to Detroit and Pittsburgh. The data seems to indicate that while the City of Philadelphia is home to a large percentage of adults who have never completed high school, it has also been able to attract and retain a significant share of residents who are college-educated professionals.

**TABLE 6: HIGHEST DEGREE ATTAINED BY ADULTS OVER THE AGE OF 25, 2014**

METROPOLITAN AREA	Did Not Finish High School		High School Graduate (Including Equivalency)	Some College and/or Associate's Degree	Bachelor's Degree	Graduate or Professional Degree	Bachelor's Degree or Higher	
	Percent	Rank					Percent	Rank
Washington, DC	10%	7 <sup>th</sup>	19%	23%	25%	24%	49%	1 <sup>st</sup>
San Francisco	12%	12 <sup>th</sup>	17%	26%	27%	19%	46%	2 <sup>nd</sup>
Boston	9%	4 <sup>th</sup>	23%	22%	25%	20%	45%	3 <sup>rd</sup>
Denver	10%	8 <sup>th</sup>	20%	29%	26%	15%	41%	4 <sup>th</sup>
<b>Trenton-Ewing</b>	<b>14%</b>	<b>19<sup>th</sup></b>	<b>23%</b>	<b>22%</b>	<b>20%</b>	<b>21%</b>	<b>41%</b>	<b>5<sup>th</sup></b>
Minneapolis-St. Paul	7%	1 <sup>st</sup>	22%	31%	26%	14%	40%	6 <sup>th</sup>
Seattle	8%	3 <sup>rd</sup>	20%	32%	25%	15%	40%	7 <sup>th</sup>
New York	14%	20 <sup>th</sup>	25%	22%	22%	16%	38%	8 <sup>th</sup>
Baltimore	10%	9 <sup>th</sup>	27%	26%	21%	16%	37%	9 <sup>th</sup>
San Diego	13%	16 <sup>th</sup>	19%	31%	23%	14%	37%	10 <sup>th</sup>
Portland	9%	5 <sup>th</sup>	22%	34%	23%	13%	36%	11 <sup>th</sup>
Atlanta	12%	13 <sup>th</sup>	25%	28%	23%	13%	36%	12 <sup>th</sup>
Chicago	13%	17 <sup>th</sup>	25%	27%	22%	14%	36%	13 <sup>th</sup>
<b>Philadelphia</b>	<b>10%</b>	<b>10<sup>th</sup></b>	<b>30%</b>	<b>24%</b>	<b>21%</b>	<b>14%</b>	<b>35%</b>	<b>14<sup>th</sup></b>
Charlotte	12%	14 <sup>th</sup>	24%	31%	22%	11%	33%	15 <sup>th</sup>
St. Louis	9%	6 <sup>th</sup>	27%	32%	19%	13%	32%	16 <sup>th</sup>
Dallas-Fort Worth	16%	22 <sup>nd</sup>	23%	29%	21%	11%	32%	17 <sup>th</sup>
Los Angeles	21%	26 <sup>th</sup>	20%	27%	21%	11%	32%	18 <sup>th</sup>
Pittsburgh	7%	2 <sup>nd</sup>	35%	26%	19%	12%	31%	19 <sup>th</sup>
Houston	18%	24 <sup>th</sup>	23%	28%	20%	11%	31%	20 <sup>th</sup>
Detroit	11%	11 <sup>th</sup>	27%	32%	18%	12%	30%	21 <sup>st</sup>
Phoenix	13%	18 <sup>th</sup>	24%	34%	19%	11%	30%	22 <sup>nd</sup>
Miami	15%	21 <sup>st</sup>	28%	28%	19%	11%	30%	23 <sup>rd</sup>
<b>United States</b>	<b>14%</b>	<b>---</b>	<b>28%</b>	<b>29%</b>	<b>18%</b>	<b>11%</b>	<b>29%</b>	<b>---</b>
Tampa-St. Petersburg	12%	15 <sup>th</sup>	29%	32%	18%	10%	28%	24 <sup>th</sup>
San Antonio	16%	23 <sup>rd</sup>	26%	32%	17%	9%	26%	25 <sup>th</sup>
Riverside-San Bernardino	20%	25 <sup>th</sup>	27%	33%	13%	7%	20%	26 <sup>th</sup>

Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates. MSAs are listed in descending order by the percentage with a bachelor's degree or higher.

**TABLE 7: DISPARITY IN EDUCATIONAL ATTAINMENT BETWEEN THE METRO AREA AND ITS PRIMARY CITY, 2014**

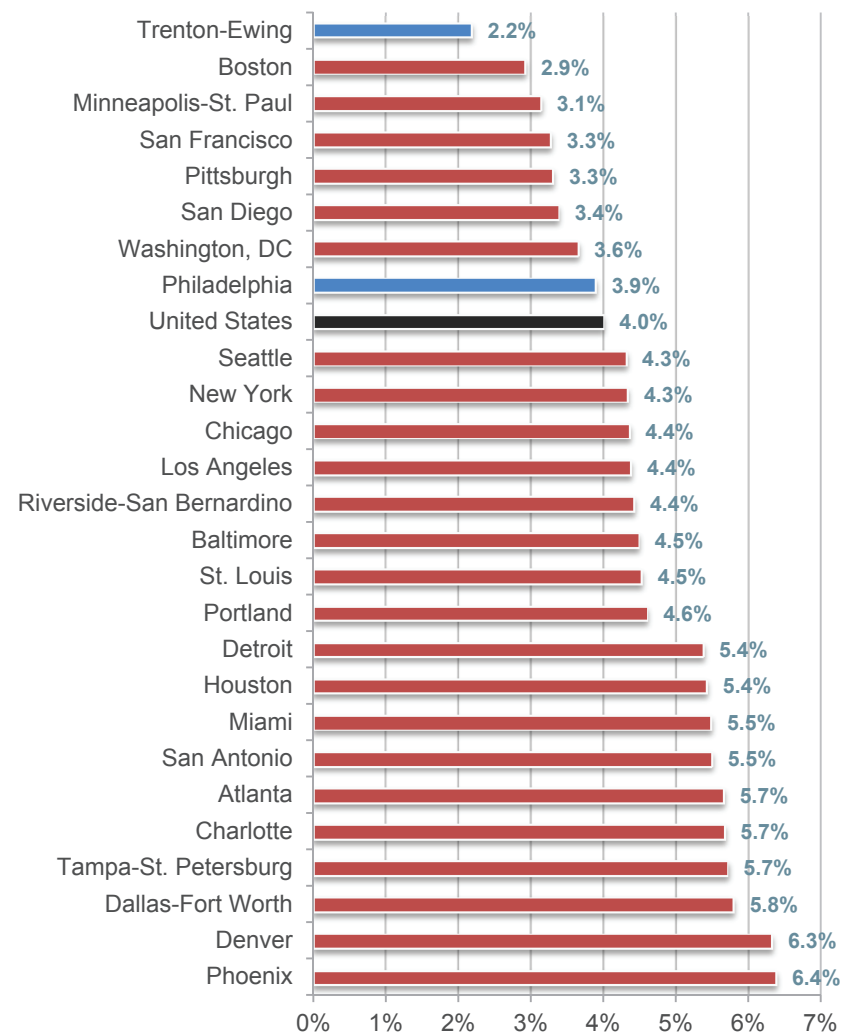
METROPOLITAN AREA	DID NOT FINISH HIGH SCHOOL				BACHELOR'S DEGREE OR HIGHER			
	Metro Area	Primary City	Ratio (Primary City to Metro Area)	Rank	Metro Area	Primary City	Ratio (Primary City to Metro Area)	Rank
Seattle	8%	7%	0.88	1 <sup>st</sup>	49%	53%	1.08	11 <sup>th</sup>
Portland	9%	9%	1.00	2 <sup>nd</sup>	40%	58%	1.45	1 <sup>st</sup>
San Diego	13%	13%	1.00	3 <sup>rd</sup>	28%	34%	1.21	5 <sup>th</sup>
Charlotte	12%	12%	1.00	4 <sup>th</sup>	32%	30%	0.94	19 <sup>th</sup>
San Francisco	12%	13%	1.08	5 <sup>th</sup>	37%	42%	1.14	9 <sup>th</sup>
Washington, DC	10%	11%	1.10	6 <sup>th</sup>	46%	53%	1.15	8 <sup>th</sup>
Riverside-San Bernardino	20%	22%	1.10	7 <sup>th</sup>	20%	22%	1.10	10 <sup>th</sup>
Tampa-St. Petersburg	12%	14%	1.17	8 <sup>th</sup>	26%	25%	0.96	18 <sup>th</sup>
San Antonio	16%	19%	1.19	9 <sup>th</sup>	31%	37%	1.19	6 <sup>th</sup>
Los Angeles	21%	25%	1.19	10 <sup>th</sup>	35%	25%	0.71	24 <sup>th</sup>
Pittsburgh	7%	9%	1.29	11 <sup>th</sup>	36%	44%	1.22	3 <sup>rd</sup>
Houston	18%	24%	1.33	12 <sup>th</sup>	30%	13%	0.43	25 <sup>th</sup>
Denver	10%	14%	1.40	13 <sup>th</sup>	34%	36%	1.06	13 <sup>th</sup>
New York	14%	20%	1.43	14 <sup>th</sup>	30%	24%	0.80	22 <sup>nd</sup>
Phoenix	13%	19%	1.46	15 <sup>th</sup>	41%	44%	1.07	12 <sup>th</sup>
Chicago	13%	19%	1.46	16 <sup>th</sup>	31%	30%	0.97	17 <sup>th</sup>
Baltimore	10%	15%	1.50	17 <sup>th</sup>	40%	47%	1.18	7 <sup>th</sup>
Atlanta	12%	18%	1.50	18 <sup>th</sup>	32%	30%	0.94	20 <sup>th</sup>
Minneapolis-St. Paul	7%	11%	1.57	19 <sup>th</sup>	30%	26%	0.87	21 <sup>st</sup>
Dallas-Fort Worth	16%	26%	1.63	20 <sup>th</sup>	45%	45%	1.00	14 <sup>th</sup>
Boston	9%	15%	1.67	21 <sup>st</sup>	32%	31%	0.97	16 <sup>th</sup>
Miami	15%	28%	1.87	22 <sup>nd</sup>	36%	35%	0.97	15 <sup>th</sup>
St. Louis	9%	17%	1.89	23 <sup>rd</sup>	36%	28%	0.78	23 <sup>rd</sup>
Philadelphia	10%	19%	1.90	24 <sup>th</sup>	33%	41%	1.24	2 <sup>nd</sup>
Detroit	11%	22%	2.00	25 <sup>th</sup>	37%	45%	1.22	4 <sup>th</sup>
Trenton-Ewing	14%	31%	2.21	26 <sup>th</sup>	41%	11%	0.27	26 <sup>th</sup>

Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates. Percentages are of adults age 25 years and older. The metropolitan areas are listed in ascending order of the ratio of adults who did not finish high school in the primary city versus the metro area as a whole

Figure 7 illustrates the high school drop-out rate in the metropolitan areas, defined as the percentage of people ages 16 to 19 not enrolled in school and who have not completed high school. The high school drop-out rate in the Trenton-Ewing MSA was the lowest of all the metros studied. Philadelphia's rate was lower than the national average and eighth lowest among the 26 metros, higher than only Trenton-Ewing; Boston; Minneapolis-St. Paul; San Francisco; Pittsburgh; San Diego; and Washington, DC.



**FIGURE 7: HIGH SCHOOL DROP-OUT RATE, 2014**



Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates. Based on people age 16 to 19 years who are not enrolled in school and who have not completed high school. Data is for the entire metropolitan area.

## Income

As noted in Table 8, the Philadelphia metropolitan area's median household income ranked 11<sup>th</sup> among the nation's largest metros. Median household income in the Trenton-Ewing MSA ranked fourth when compared to the larger metros, behind only Washington, DC; San Francisco; and Boston.

Figure 8 illustrates the change in median household income between 2010 and 2014 (two recent years for which the most comparable data is available). Median household income declined in the nation as a whole and in 12 of the metropolitan areas, including the Philadelphia MSA (where income declined by 1.5 percent) and the Trenton-Ewing MSA (with a decline of 1.9 percent). While this decline may be due to the recent recession and ongoing recovery, it may also be related, at least in part, to sampling error, given that the data are estimates based on the ongoing American Community Survey.

Table 9 provides data on the median household income in the primary city and the MSA as a whole, and includes a ratio calculated by dividing the median income in the city by the median income in the larger MSA (the lower the ratio, the greater the disparity between the two). With the exception of Riverside-San Bernardino, the median income in the primary city within each MSA is lower than that of the MSA as a whole.

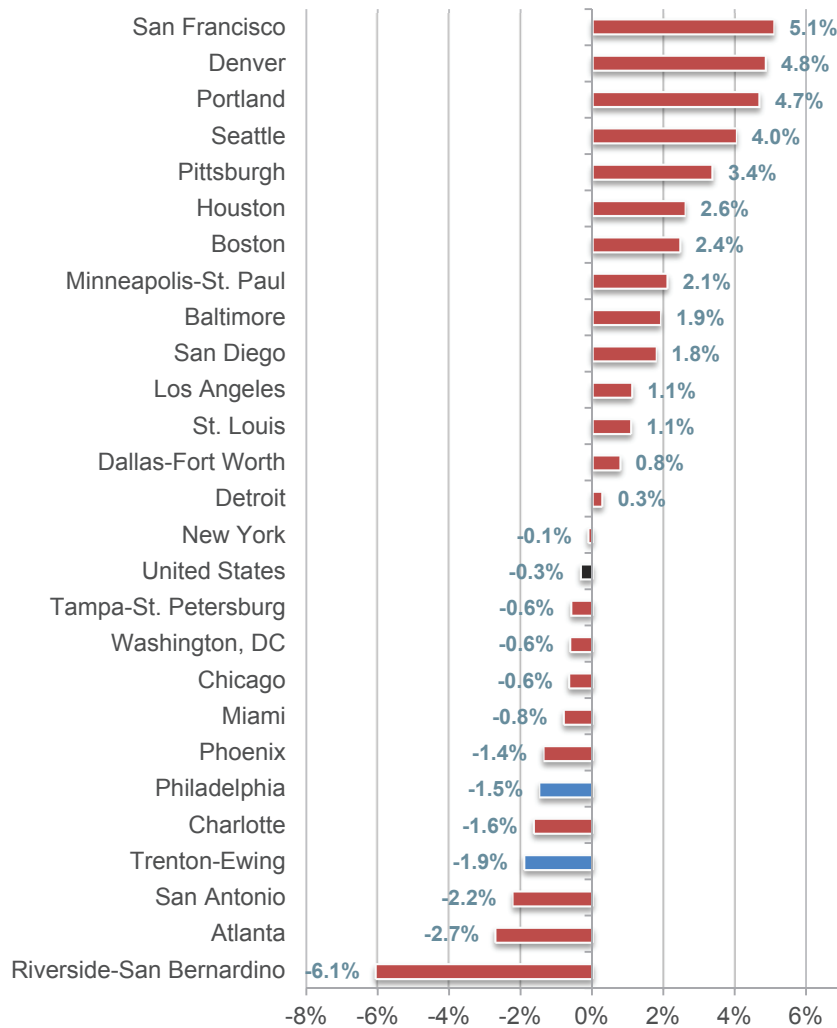
Based on this measure, the Philadelphia metro has the fourth highest income disparity, ahead of only Trenton-Ewing, Baltimore, and Detroit. This disparity is undoubtedly related to the similar disparity in educational attainment discussed previously. The greatest disparity is in the Trenton-Ewing MSA, although, as was the case with educational attainment, this difference may be overstated given the relatively fewer number of suburban households to balance against lower-income households living in the City of Trenton.

TABLE 8: MEDIAN HOUSEHOLD INCOME, 2010 AND 2014

METROPOLITAN AREA	2010	2014		2010-2014	
		Income	Rank	Percentage Change	Rank
Washington, DC	\$91,756	\$91,193	1 <sup>st</sup>	-0.6%	16 <sup>th</sup>
San Francisco	\$79,205	\$83,222	2 <sup>nd</sup>	5.1%	1 <sup>st</sup>
Boston	\$73,860	\$75,667	3 <sup>rd</sup>	2.4%	7 <sup>th</sup>
<b>Trenton-Ewing</b>	<b>\$76,432</b>	<b>\$74,961</b>	<b>4<sup>th</sup></b>	<b>-1.9%</b>	<b>23<sup>rd</sup></b>
Baltimore	\$70,166	\$71,501	5 <sup>th</sup>	1.9%	9 <sup>th</sup>
Seattle	\$68,516	\$71,273	6 <sup>th</sup>	4.0%	4 <sup>th</sup>
Minneapolis-St. Paul	\$67,698	\$69,111	7 <sup>th</sup>	2.1%	8 <sup>th</sup>
New York	\$67,143	\$67,066	8 <sup>th</sup>	-0.1%	15 <sup>th</sup>
Denver	\$63,777	\$66,870	9 <sup>th</sup>	4.8%	2 <sup>nd</sup>
San Diego	\$65,034	\$66,192	10 <sup>th</sup>	1.8%	10 <sup>th</sup>
<b>Philadelphia</b>	<b>\$63,102</b>	<b>\$62,171</b>	<b>11<sup>th</sup></b>	<b>-1.5%</b>	<b>21<sup>st</sup></b>
Chicago	\$61,996	\$61,598	12 <sup>th</sup>	-0.6%	17 <sup>th</sup>
Los Angeles	\$59,876	\$60,514	13 <sup>th</sup>	1.1%	11 <sup>th</sup>
Portland	\$57,555	\$60,248	14 <sup>th</sup>	4.7%	3 <sup>rd</sup>
Houston	\$58,556	\$60,072	15 <sup>th</sup>	2.6%	6 <sup>th</sup>
Dallas-Fort Worth	\$59,074	\$59,530	16 <sup>th</sup>	0.8%	13 <sup>th</sup>
Atlanta	\$57,727	\$56,166	17 <sup>th</sup>	-2.7%	25 <sup>th</sup>
St. Louis	\$54,946	\$55,535	18 <sup>th</sup>	1.1%	12 <sup>th</sup>
Riverside	\$58,103	\$54,586	19 <sup>th</sup>	-6.1%	26 <sup>th</sup>
<b>United States</b>	<b>\$53,856</b>	<b>\$53,657</b>	<b>---</b>	<b>-0.3%</b>	<b>---</b>
Charlotte	\$54,438	\$53,549	20 <sup>th</sup>	-1.6%	22 <sup>nd</sup>
Phoenix	\$54,100	\$53,365	21 <sup>st</sup>	-1.4%	20 <sup>th</sup>
San Antonio	\$53,886	\$52,689	22 <sup>nd</sup>	-2.2%	24 <sup>th</sup>
Detroit	\$52,323	\$52,462	23 <sup>rd</sup>	0.3%	14 <sup>th</sup>
Pittsburgh	\$50,591	\$52,293	24 <sup>th</sup>	3.4%	5 <sup>th</sup>
Miami	\$48,846	\$48,458	25 <sup>th</sup>	-0.8%	19 <sup>th</sup>
Tampa-St. Petersburg	\$47,160	\$46,876	26 <sup>th</sup>	-0.6%	18 <sup>th</sup>

Source: U.S. Census Bureau, American Community Survey 2014 and 2010 One-Year Estimates.

**FIGURE 8: CHANGE IN MEDIAN HOUSEHOLD INCOME, 2010–2014**



Source: U.S. Census Bureau, American Community Survey, 2014 One-Year Estimates

**TABLE 9: MEDIAN HOUSEHOLD INCOME, PRIMARY CITY VERSUS THE METROPOLITAN AREA, 2014**

METROPOLITAN AREA	MSA	PRIMARY CITY	RATIO OF CITY INCOME TO MSA INCOME
Riverside-San Bernardino	\$54,586	\$56,089	1.03
San Diego	\$66,192	\$65,753	0.99
Charlotte	\$53,549	\$53,274	0.99
Seattle	\$71,273	\$67,365	0.95
San Francisco	\$83,222	\$78,378	0.94
Tampa-St. Petersburg	\$46,876	\$43,740	0.93
Phoenix	\$53,365	\$46,881	0.88
San Antonio	\$52,689	\$46,317	0.88
Portland	\$60,248	\$53,230	0.88
Atlanta	\$56,166	\$46,439	0.83
Los Angeles	\$60,514	\$49,682	0.82
New York	\$67,066	\$52,737	0.79
Chicago	\$61,598	\$47,831	0.78
Pittsburgh	\$52,293	\$40,009	0.77
Denver	\$66,870	\$51,800	0.77
Washington, DC	\$91,193	\$69,235	0.76
Houston	\$60,072	\$45,728	0.76
Dallas-Fort Worth	\$59,530	\$43,359	0.73
Minneapolis-St. Paul	\$69,111	\$50,767	0.73
Boston	\$75,667	\$54,485	0.72
Miami	\$48,458	\$30,858	0.64
St. Louis	\$55,535	\$34,800	0.63
Philadelphia	\$62,171	\$37,460	0.60
Baltimore	\$71,501	\$41,819	0.58
Detroit	\$52,462	\$26,095	0.50
Trenton-Ewing	\$74,118	\$35,647	0.48

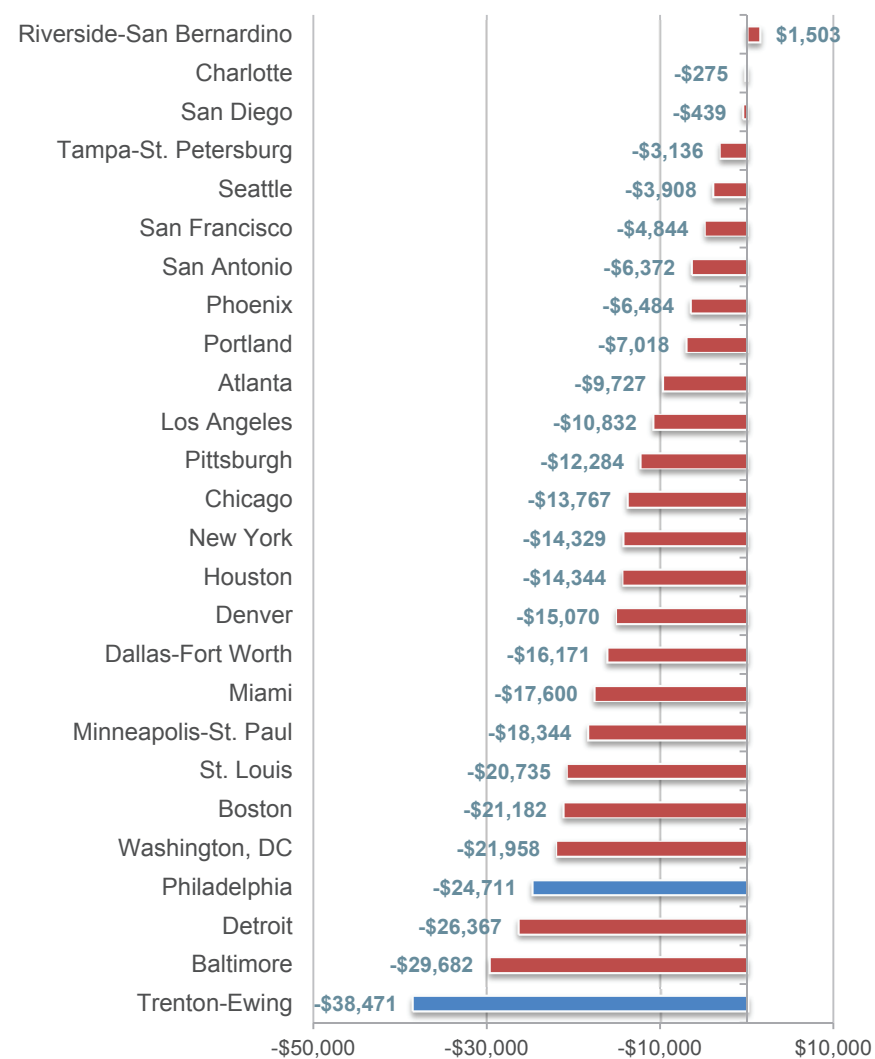
Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates.

Figure 9 illustrates even more clearly the difference between the median household income in the primary city and the MSA as a whole, by calculating the difference between the median household income of the primary city and its MSA. In the Riverside-San Bernardino MSA, the median income of Riverside City is over \$1,500 higher than the MSA as a whole. The median household income in the City of Philadelphia is almost \$25,000 less than the MSA as a whole, and in the Trenton-Ewing MSA, the difference is over \$38,000.

Table 10 and Figure 10 provide information on per capita income in each MSA and its change between 2010 and 2014. The results are comparable to the household income comparisons, with the per capita income of the Trenton-Ewing MSA ranked fourth highest (behind San Francisco; Washington, DC; and Boston) and the Philadelphia MSA's per capita income ranked 10<sup>th</sup> highest. Per capita income increased between 2010 and 2014 in both the Philadelphia and Trenton-Ewing metros, though at much slower rates than many other faster-growing metropolitan areas.



**FIGURE 9: DIFFERENCE IN MEDIAN HOUSEHOLD INCOME, PRIMARY CITY VERSUS THE MSA, 2014**



Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates.

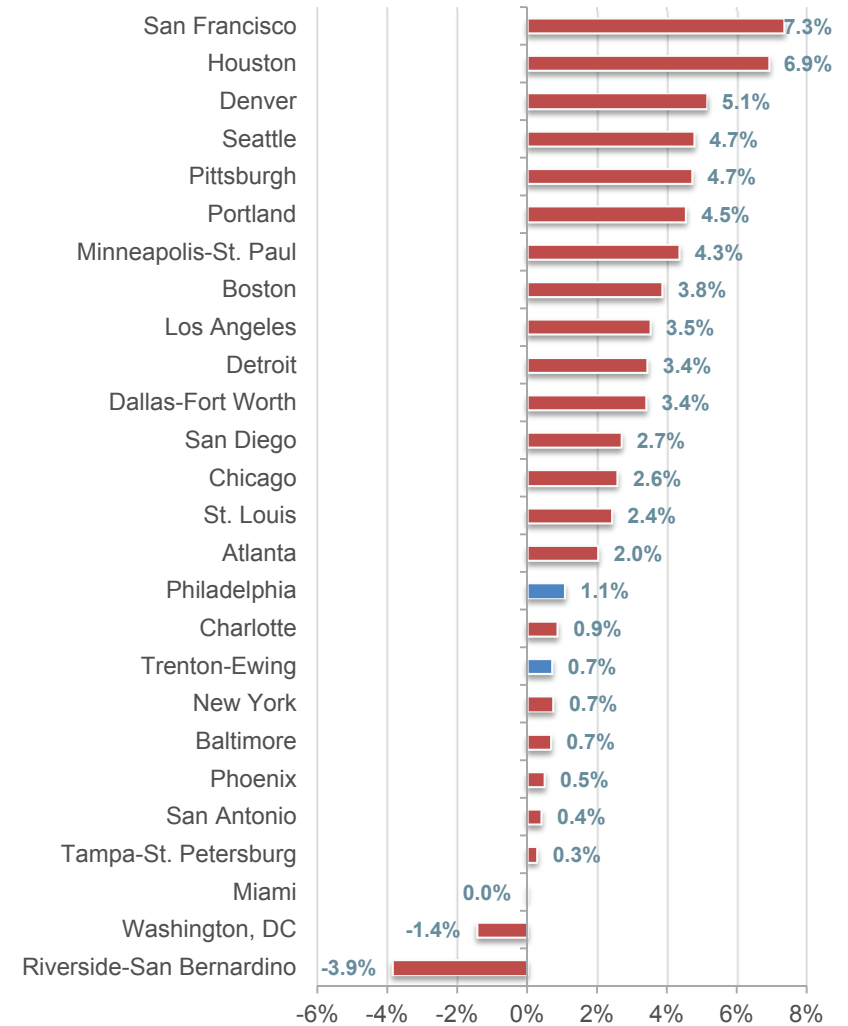


**TABLE 10: PER CAPITA INCOME, 2010–2014**

METROPOLITAN AREA	2010	2014		2010-2014	
		Income	Rank	Percentage Change	Rank
San Francisco	\$40,929	\$43,924	1 <sup>st</sup>	7.3%	1 <sup>st</sup>
Washington, DC	\$44,007	\$43,371	2 <sup>nd</sup>	-1.4%	25 <sup>th</sup>
Boston	\$39,090	\$40,593	3 <sup>rd</sup>	3.8%	8 <sup>th</sup>
<b>Trenton-Ewing</b>	<b>\$37,879</b>	<b>\$38,159</b>	<b>4<sup>th</sup></b>	<b>0.7%</b>	<b>18<sup>th</sup></b>
Seattle	\$35,183	\$36,854	5 <sup>th</sup>	4.7%	4 <sup>th</sup>
New York	\$36,059	\$36,323	6 <sup>th</sup>	0.7%	19 <sup>th</sup>
Minneapolis-St. Paul	\$34,173	\$35,652	7 <sup>th</sup>	4.3%	7 <sup>th</sup>
Baltimore	\$35,364	\$35,596	8 <sup>th</sup>	0.7%	20 <sup>th</sup>
Denver	\$33,543	\$35,256	9 <sup>th</sup>	5.1%	3 <sup>rd</sup>
<b>Philadelphia</b>	<b>\$32,847</b>	<b>\$33,196</b>	<b>10<sup>th</sup></b>	<b>1.1%</b>	<b>16<sup>th</sup></b>
Chicago	\$31,088	\$31,885	11 <sup>th</sup>	2.6%	13 <sup>th</sup>
San Diego	\$30,945	\$31,770	12 <sup>th</sup>	2.7%	12 <sup>th</sup>
Portland	\$29,808	\$31,155	13 <sup>th</sup>	4.5%	6 <sup>th</sup>
Pittsburgh	\$29,400	\$30,780	14 <sup>th</sup>	4.7%	5 <sup>th</sup>
Houston	\$28,710	\$30,689	15 <sup>th</sup>	6.9%	2 <sup>nd</sup>
Dallas-Fort Worth	\$29,335	\$30,325	16 <sup>th</sup>	3.4%	10 <sup>th</sup>
St. Louis	\$29,581	\$30,293	17 <sup>th</sup>	2.4%	14 <sup>th</sup>
Los Angeles	\$28,899	\$29,918	18 <sup>th</sup>	3.5%	9 <sup>th</sup>
Charlotte	\$28,945	\$29,193	19 <sup>th</sup>	0.9%	17 <sup>th</sup>
Atlanta	\$28,594	\$29,170	20 <sup>th</sup>	2.0%	15 <sup>th</sup>
<b>United States</b>	<b>\$28,296</b>	<b>\$28,889</b>	<b>---</b>	<b>2.1%</b>	<b>---</b>
Detroit	\$27,584	\$28,527	21 <sup>st</sup>	3.4%	11 <sup>th</sup>
Tampa-St. Petersburg	\$27,101	\$27,173	22 <sup>nd</sup>	0.3%	23 <sup>rd</sup>
Miami	\$27,127	\$27,126	23 <sup>rd</sup>	0.0%	24 <sup>th</sup>
Phoenix	\$26,940	\$27,069	24 <sup>th</sup>	0.5%	21 <sup>st</sup>
San Antonio	\$25,446	\$25,546	25 <sup>th</sup>	0.4%	22 <sup>nd</sup>
Riverside- San Bernardino	\$23,206	\$22,310	26 <sup>th</sup>	-3.9%	26 <sup>th</sup>

Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates.

**FIGURE 10: CHANGE IN PER CAPITA INCOME, 2010–2014**



Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates.

**TABLE 11: POVERTY STATUS, 2014**

METROPOLITAN AREA	RESIDENTS LIVING IN POVERTY	CHILDREN LIVING IN POVERTY	ADULTS 65 YEARS AND OLDER LIVING IN POVERTY
Washington, DC	9%	11%	7%
Minneapolis-St. Paul	10%	14%	7%
Boston	11%	14%	9%
Denver	11%	15%	7%
San Francisco	11%	13%	9%
Baltimore	11%	14%	8%
Seattle	11%	14%	9%
<b>Trenton-Ewing</b>	<b>12%</b>	<b>17%</b>	<b>10%</b>
Pittsburgh	12%	18%	8%
St. Louis	13%	18%	7%
<b>Philadelphia</b>	<b>13%</b>	<b>19%</b>	<b>9%</b>
Portland	14%	17%	8%
Chicago	14%	20%	9%
New York	15%	20%	12%
San Diego	15%	19%	10%
Dallas-Fort Worth	15%	22%	8%
Charlotte	15%	21%	9%
Houston	15%	22%	10%
<b>United States</b>	<b>16%</b>	<b>28%</b>	<b>9%</b>
Atlanta	16%	23%	9%
Tampa-St. Petersburg	16%	22%	11%
Detroit	16%	24%	9%
San Antonio	17%	24%	10%
Miami	17%	24%	15%
Phoenix	17%	25%	9%
Los Angeles	17%	25%	13%
Riverside-San Bernardino	19%	26%	11%

Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates.

## Poverty

As illustrated in Table 11, approximately 12 percent of the population of the Trenton-Ewing MSA and 13 percent of the population of the Philadelphia metropolitan area was living below the federally defined poverty level in 2014, ranking them eighth and 11<sup>th</sup>, respectively, among the metro areas studied.

Poverty, unfortunately, is concentrated in the younger populations. In Philadelphia, 19 percent of residents under the age of 18 lived in poverty in 2014, compared to 13 percent of the population overall; and in the Trenton-Ewing MSA, 17 percent of children lived in poverty, compared to 12 percent of the overall population. The percentage of the elderly living in poverty is lower than that of the overall population in all of the metropolitan areas, most likely due to the aging of wealthier baby boomers.

In all of the metropolitan areas studied, poverty is concentrated in the primary city. Table 12 describes the poverty rates in each metropolitan area and its primary city, and provides a ratio of poverty in the primary city versus the metro as a whole. With 27 percent of the city's population living below poverty in 2014, the Philadelphia metro area has the eighth highest ratio between the poverty rates of the city and the metro area, while the ratio in the Trenton-Ewing metro is the highest. As is the case with educational disparity, this higher disparity in poverty in the Trenton-Ewing metro area is likely due to a high concentration of residents living below poverty in the City of Trenton and proportionately fewer higher-income suburbanites than found in larger metro areas.

**TABLE 12: PEOPLE LIVING BELOW POVERTY, PRIMARY CITY VERSUS METROPOLITAN AREA, 2014**

METROPOLITAN AREA	PRIMARY CITY	METRO AREA	RATIO (PRIMARY CITY TO METRO AREA)
San Diego	16%	15%	1.07
Riverside-San Bernardino	20%	18%	1.09
Charlotte	17%	15%	1.13
San Francisco	13%	11%	1.18
Seattle	14%	12%	1.20
San Antonio	20%	17%	1.22
Los Angeles	22%	17%	1.31
Portland	18%	14%	1.32
Phoenix	23%	17%	1.36
Tampa-St. Petersburg	22%	16%	1.40
Houston	23%	16%	1.41
New York	21%	14%	1.45
Denver	18%	12%	1.52
Atlanta	25%	16%	1.61
Chicago	23%	14%	1.61
Dallas-Fort Worth	24%	15%	1.63
Miami	30%	17%	1.73
Pittsburgh	23%	12%	1.85
<b>Philadelphia</b>	<b>27%</b>	<b>13%</b>	<b>2.02</b>
St. Louis	28%	13%	2.10
Boston	22%	10%	2.11
Minneapolis-St. Paul	23%	11%	2.14
Washington, DC	18%	8%	2.17
Baltimore	24%	11%	2.20
Detroit	40%	17%	2.36
<b>Trenton-Ewing</b>	<b>28%</b>	<b>12%</b>	<b>2.43</b>

Source: U.S. Census Bureau, American Community Survey 2010–2014 Five-Year Estimates.

### *Housing Tenure and Occupancy*

The availability and affordability of quality housing is an important determinant of the attractiveness or competitiveness of a region. Homeownership rates in the nation’s largest metro areas vary from over 70 percent in Minneapolis-St. Paul to less than 48 percent in Los Angeles. As indicated in Table 13, in 2014, 67 percent of the Philadelphia metropolitan area’s occupied housing units were owner occupied, fifth highest among the metros studied and higher than the national average of 64 percent. Sixty-four percent of the occupied units in the Trenton-Ewing MSA were owner occupied, comparable to the national average and ranking eighth.

Table 13 also describes the change in homeownership rates between 2006 and 2013. The percentage of homeowners declined in both the Philadelphia and Trenton-Ewing metropolitan areas between 2006 and 2013, but at slower rates than many of the other metropolitan areas. Homeownership rates declined in all but one of the nation’s 100 largest metro areas between 2006 and 2013. In recent years, the Las Vegas, Nevada; and Phoenix, Arizona; metro areas, along with other areas experiencing large numbers of foreclosures, have experienced some of the largest reductions in homeownership. The national homeownership rate for the first quarter of 2015 fell below 64 percent, the lowest level in about two decades.

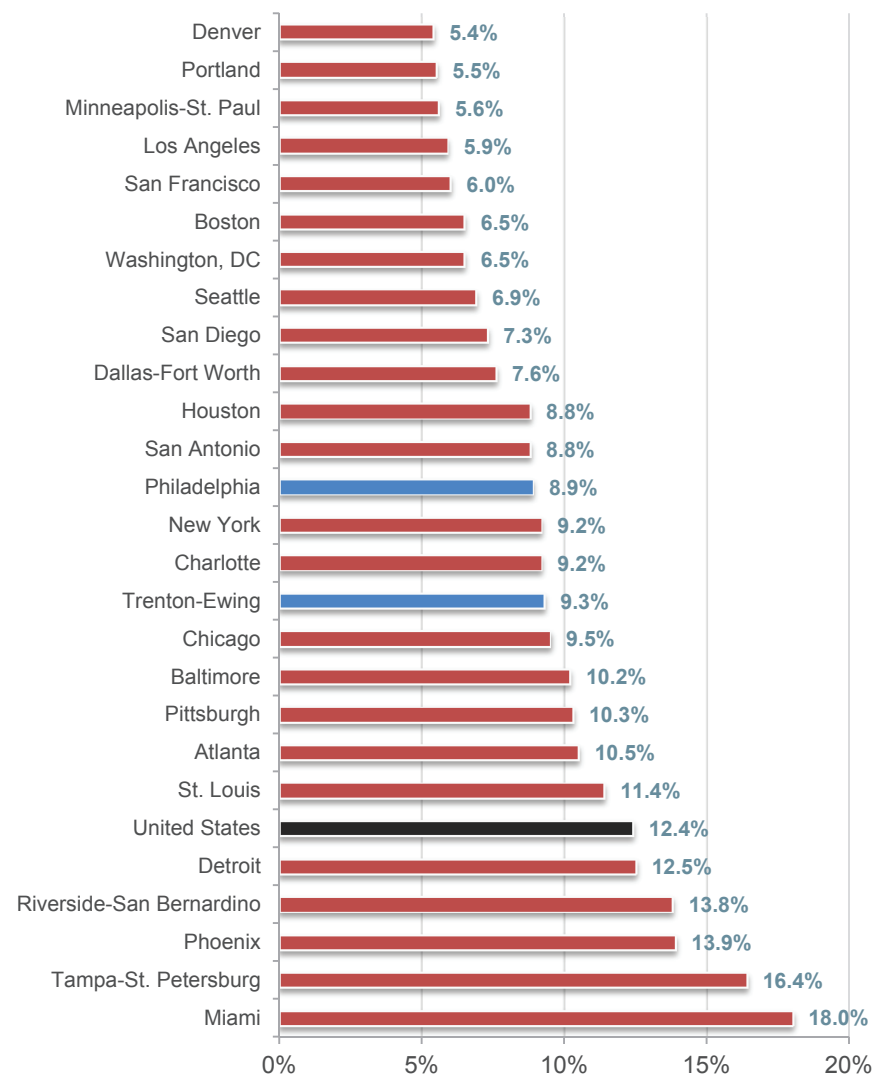
Housing vacancy rates were approximately 9 percent in both the Philadelphia and Trenton-Ewing metropolitan areas in 2014, as illustrated in Figure 11. While relatively high, these rates were comparable to the average rate of the metropolitan areas studied (ranking 13th and 16th, respectively) and lower than the national average of over 12 percent.

**TABLE 13: HOMEOWNERSHIP RATES, 2006–2013**

METROPOLITAN AREA	2006	2014		2006-2014	
		Rate	Rank	Change	Rank
Minneapolis-St. Paul	75%	70%	1 <sup>st</sup>	-5%	13 <sup>th</sup>
Pittsburgh	72%	69%	2 <sup>nd</sup>	-3%	1 <sup>st</sup>
St. Louis	73%	69%	3 <sup>rd</sup>	-4%	7 <sup>th</sup>
Detroit	75%	68%	4 <sup>th</sup>	-7%	21 <sup>st</sup>
<b>Philadelphia</b>	<b>71%</b>	<b>67%</b>	<b>5<sup>th</sup></b>	<b>-4%</b>	<b>5<sup>th</sup></b>
Baltimore	69%	66%	6 <sup>th</sup>	-3%	2 <sup>nd</sup>
Charlotte	70%	65%	7 <sup>th</sup>	-5%	11 <sup>th</sup>
<b>Trenton-Ewing</b>	<b>69%</b>	<b>64%</b>	<b>8<sup>th</sup></b>	<b>-5%</b>	<b>10<sup>th</sup></b>
<b>United States</b>	<b>67%</b>	<b>64%</b>	<b>---</b>	<b>-3%</b>	<b>---</b>
Chicago	69%	64%	9 <sup>th</sup>	-5%	12 <sup>th</sup>
Washington, DC	68%	63%	10 <sup>th</sup>	-5%	15 <sup>th</sup>
Tampa-St. Petersburg	71%	63%	11 <sup>th</sup>	-8%	23 <sup>rd</sup>
Denver	68%	62%	12 <sup>th</sup>	-6%	20 <sup>th</sup>
Atlanta	69%	62%	13 <sup>th</sup>	-7%	22 <sup>nd</sup>
Boston	64%	61%	14 <sup>th</sup>	-3%	3 <sup>rd</sup>
San Antonio	67%	61%	15 <sup>th</sup>	-6%	19 <sup>th</sup>
Riverside-San Bernardino	68%	61%	16 <sup>th</sup>	-7%	24 <sup>th</sup>
Portland	65%	60%	17 <sup>th</sup>	-5%	16 <sup>th</sup>
Miami	67%	60%	18 <sup>th</sup>	-7%	25 <sup>th</sup>
Phoenix	69%	60%	19 <sup>th</sup>	-9%	26 <sup>th</sup>
Houston	63%	59%	20 <sup>th</sup>	-4%	6 <sup>th</sup>
Seattle	63%	59%	21 <sup>st</sup>	-4%	9 <sup>th</sup>
Dallas-Fort Worth	64%	59%	22 <sup>nd</sup>	-5%	14 <sup>th</sup>
San Francisco	59%	53%	23 <sup>rd</sup>	-6%	17 <sup>th</sup>
San Diego	58%	52%	24 <sup>th</sup>	-6%	18 <sup>th</sup>
New York	54%	51%	25 <sup>th</sup>	-3%	4 <sup>th</sup>
Los Angeles	52%	48%	26 <sup>th</sup>	-4%	8 <sup>th</sup>

Source: Joint Center for Housing Studies of Harvard University. Data is based on tabulations of U.S. Census Bureau, American Community Survey data.

**FIGURE 11: HOUSING VACANCY RATE, 2014**



Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates.



**THE ENVIRONMENT**  
*and*  
**NATURAL RESOURCES**

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## THE ENVIRONMENT AND NATURAL RESOURCES

Open space, natural areas, farmland, and historic resources are essential to maintaining any region’s quality of life. In large metropolitan areas, however, many of these resources are endangered by sprawling development patterns. Open spaces naturally maintain air and water quality, support a thriving agricultural economy, offer habitat for wildlife, provide opportunities for recreation and healthy lifestyles, and are a cornerstone of a region’s character and quality of life

### Parks

A popular measure of a city’s quality of life is public parkland. Urban parks tend to be regularly used and accessible to diverse groups of people, and city recreation departments provide social services ranging from maintaining unique amenities, like an observatory or zoo, to organizing Ultimate Frisbee leagues and operating summer day camps. Many large cities have invested in expanding, refurbishing, or establishing new city parks.

The Trust for Public Land produces an annual survey on public parkland in the nation’s largest cities. As indicated in Table 14, the City of Philadelphia ranks 11<sup>th</sup> in terms of the percentage of city acres that are parkland, with almost 11,000 acres. Cities with the highest percentage of their total acres used as urban parkland include San Diego and Washington, DC (where almost 22 percent of the land area is dedicated to monuments, city parklands, or public spaces like museums). New York City, the densest city in the nation, dedicates over 20 percent of its total land area to public spaces.

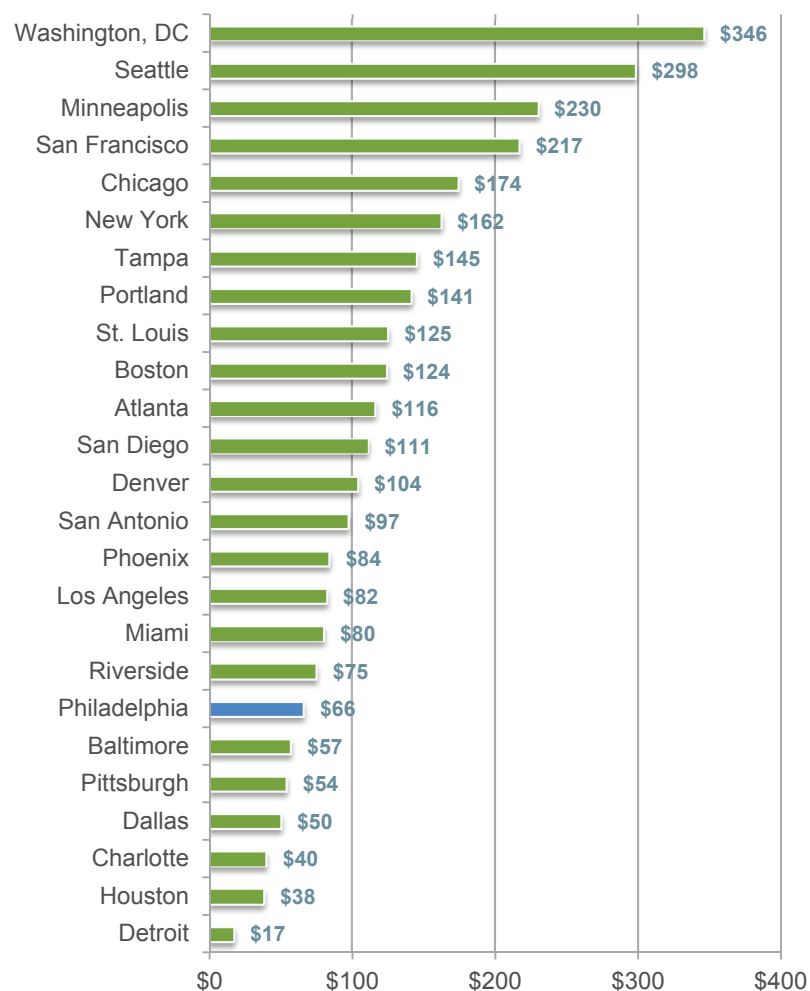
Figure 12 and Table 15 describe operating and capital expenditures for parks and recreation in the primary cities. The City of Philadelphia ranks near the bottom, with expenditures averaging \$66 per resident.

TABLE 14: URBAN PARKLAND, 2014

METROPOLITAN AREA	Park Acres		Park Acres as a Percentage of City Acres		Park Acres per 1,000 Residents	
	Acres	Rank	Percent	Rank	Acres	Rank
San Diego	48,405	3 <sup>rd</sup>	23.5%	1 <sup>st</sup>	35.7	1 <sup>st</sup>
Washington, DC	8,513	12 <sup>th</sup>	21.9%	2 <sup>nd</sup>	13.2	9 <sup>th</sup>
New York	39,006	4 <sup>th</sup>	20.8%	3 <sup>rd</sup>	4.6	23 <sup>rd</sup>
San Francisco	5,693	16 <sup>th</sup>	19.0%	4 <sup>th</sup>	6.8	22 <sup>nd</sup>
Portland	14,442	9 <sup>th</sup>	17.7%	5 <sup>th</sup>	23.7	4 <sup>th</sup>
Boston	4,919	19 <sup>th</sup>	16.9%	6 <sup>th</sup>	7.6	20 <sup>th</sup>
Phoenix	49,254	2 <sup>nd</sup>	15.0%	7 <sup>th</sup>	32.5	2 <sup>nd</sup>
Minneapolis	5,056	18 <sup>th</sup>	14.9%	8 <sup>th</sup>	12.6	10 <sup>th</sup>
Houston	52,915	1 <sup>st</sup>	14.3%	9 <sup>th</sup>	24.1	3 <sup>rd</sup>
Los Angeles	37,232	5 <sup>th</sup>	14.2%	10 <sup>th</sup>	9.3	16 <sup>th</sup>
<b>Philadelphia</b>	<b>10,815</b>	<b>11<sup>th</sup></b>	<b>13.0%</b>	<b>11<sup>th</sup></b>	<b>7.0</b>	<b>21<sup>st</sup></b>
Dallas	22,003	7 <sup>th</sup>	12.6%	12 <sup>th</sup>	21.6	5 <sup>th</sup>
Seattle	6,541	13 <sup>th</sup>	12.4%	13 <sup>th</sup>	10.0	14 <sup>th</sup>
Pittsburgh	2,983	24 <sup>th</sup>	9.8%	14 <sup>th</sup>	9.8	15 <sup>th</sup>
Baltimore	4,905	20 <sup>th</sup>	9.6%	15 <sup>th</sup>	7.9	19 <sup>th</sup>
St. Louis	3,684	23 <sup>rd</sup>	9.4%	16 <sup>th</sup>	11.6	12 <sup>th</sup>
Chicago	12,485	10 <sup>th</sup>	9.1%	17 <sup>th</sup>	4.6	24 <sup>th</sup>
San Antonio	25,423	6 <sup>th</sup>	8.7%	18 <sup>th</sup>	18.0	7 <sup>th</sup>
Denver	5,884	14 <sup>th</sup>	7.9%	19 <sup>th</sup>	9.1	17 <sup>th</sup>
Riverside	3,761	22 <sup>nd</sup>	7.3%	20 <sup>th</sup>	11.6	11 <sup>th</sup>
Tampa	4,818	21 <sup>st</sup>	6.9%	21 <sup>st</sup>	13.7	8 <sup>th</sup>
Detroit	5,748	15 <sup>th</sup>	6.4%	22 <sup>nd</sup>	8.2	18 <sup>th</sup>
Miami	1,442	25 <sup>th</sup>	6.3%	23 <sup>rd</sup>	3.5	25 <sup>th</sup>
Atlanta	5,159	17 <sup>th</sup>	6.1%	24 <sup>th</sup>	11.5	13 <sup>th</sup>
Charlotte	20,875	8 <sup>th</sup>	5.6%	25 <sup>th</sup>	21.1	6 <sup>th</sup>

Source: Trust for Public Land, 2015 City Park Facts. Data includes only parkland located within each metropolitan area’s primary city.

**FIGURE 12: CITY SPENDING ON URBAN PARKS AND RECREATION PER CITY RESIDENT, 2014**



Source: Trust for Public Land, 2012 City Park Facts. Total expenditures includes both operating and capital expenditures but excludes zoos, stadiums, museums, aquariums, and cemeteries. Data includes only parkland located within each metropolitan area's primary city.

**TABLE 15: CITY SPENDING ON URBAN PARKS AND RECREATION, 2014**

METROPOLITAN AREA	OPERATING EXPENDITURE PER RESIDENT	CAPITAL EXPENDITURE PER RESIDENT
Washington, DC	\$262	\$84
Seattle	\$161	\$88
Minneapolis	\$177	\$53
San Francisco	\$177	\$39
Chicago	\$130	\$44
New York	\$112	\$50
Tampa	\$103	\$42
Portland	\$121	\$20
St. Louis	\$98	\$27
Boston	\$88	\$36
Atlanta	\$93	\$23
San Diego	\$102	\$9
Denver	\$86	\$18
San Antonio	\$65	\$32
Phoenix	\$71	\$13
Los Angeles	\$66	\$16
Miami	\$74	\$6
Riverside	\$67	\$8
Philadelphia	\$54	\$12
Baltimore	\$57	\$0
Pittsburgh	\$49	\$5
Dallas	\$49	\$1
Charlotte	\$33	\$7
Houston	\$32	\$6
Detroit	\$16	\$1

Source: Trust for Public Land, 2015 City Park Facts. Total expenditures include both operating and capital expenditures but exclude zoos, stadiums, museums, aquariums, and cemeteries.



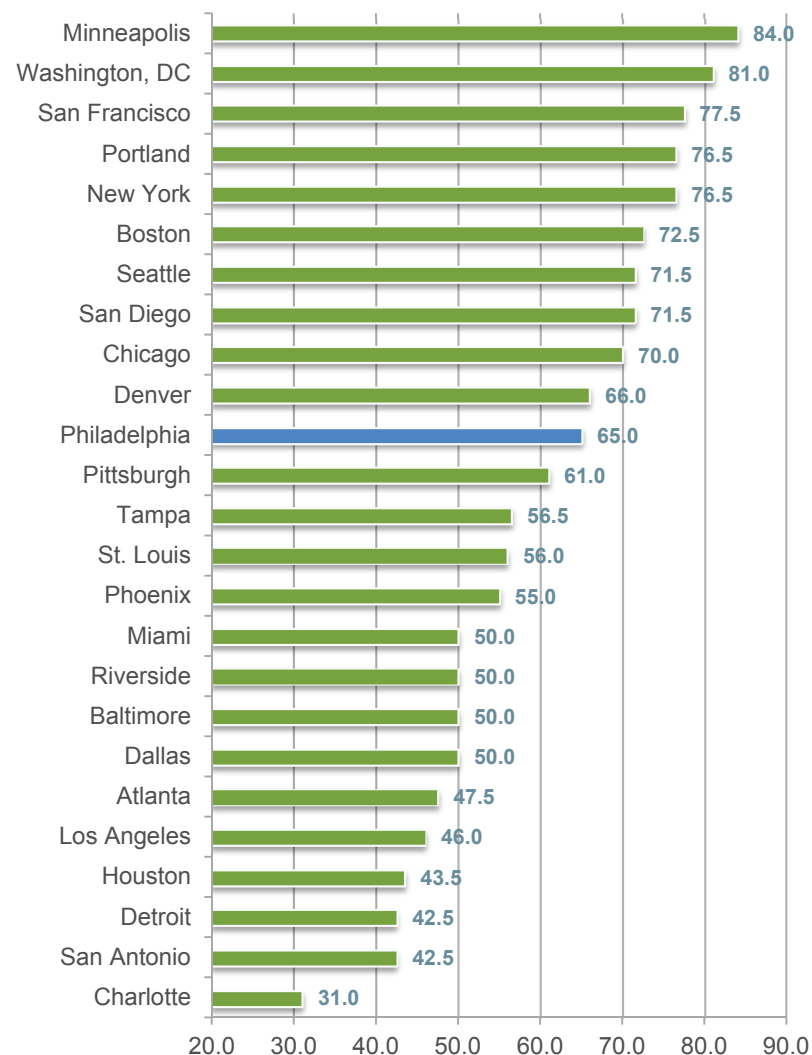
Philadelphia’s park expenditures include an average of \$54 per resident in operating expenditures and \$12 per resident in capital expenditures. These expenditures include funds spent by each city’s public agencies, but do not include any additional expenditures by nonprofits or private foundations.

Figure 13 illustrates an overall Park Score calculated by the Trust for Public Land for the primary cities within the metro areas. In evaluating park systems, the Trust for Public Land considers land owned by regional, state, and federal agencies within the 75 most populous U.S. cities—including school playgrounds open to the public and greenways that function as parks. Cities earn a maximum Park Score of 100, based on three important characteristics of an effective park system: acreage; facilities and investment; and access. Based on this analysis, the City of Philadelphia ranked 11th among the 26 metros studied.



*Gardens in Fairmount Park, Philadelphia*

**FIGURE 13: OVERALL PARK SCORE, 2015**



Source: Trust for Public Land, 2015. Score is for each metropolitan area’s primary city.

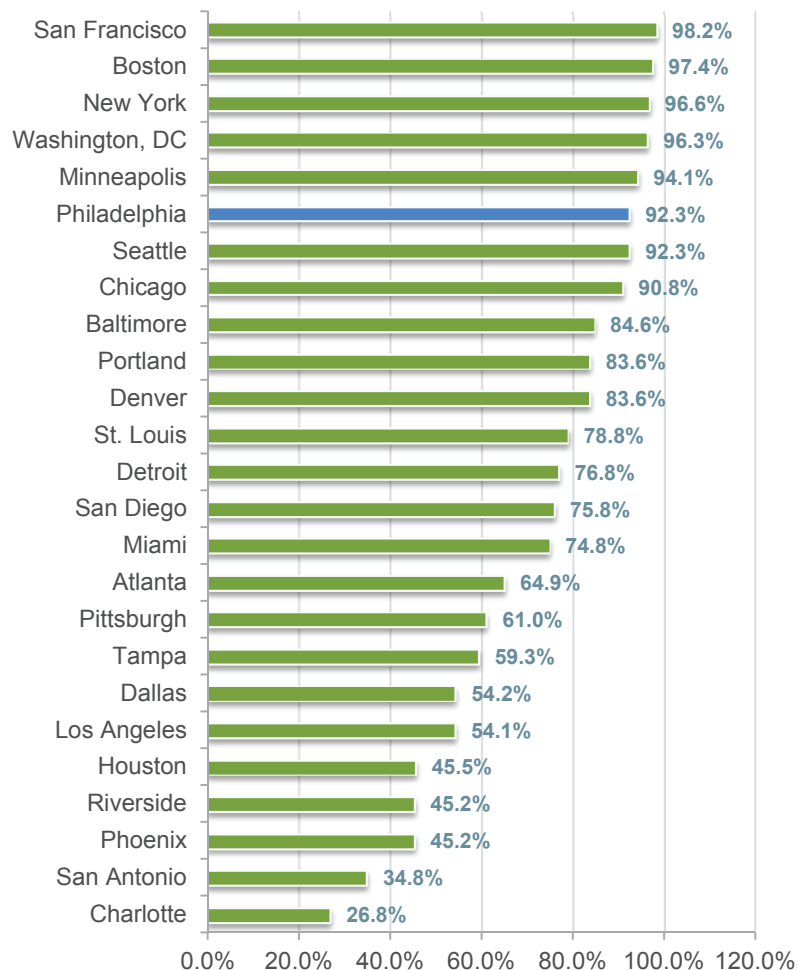
Figure 14 illustrates the percentage of city residents who have walkable park access, defined as the ability to reach a publicly owned park within a half-mile walk on the road network, unobstructed by freeways, rivers, fences, and other obstacles. By this measure, the City of Philadelphia ranks sixth among the primary cities, exceeded by only San Francisco; Boston; New York; Washington, D.C.; and Minneapolis.

The metropolitan area comparisons presented in this report are primarily quantifiable measures collected by numerous federal agencies. The availability of data that quantifies the commitment within a region to protecting environmental resources, however, is limited. Figure 15 illustrates the number of nonprofits per capita in each metro that listed their primary mission as “environmental and animals.” The Trenton-Ewing metro area was second in terms of the number of registered environmental nonprofits per resident (not surprising given the City of Trenton’s role as the state capital and center of government), and the Philadelphia metro ranked 12<sup>th</sup>.



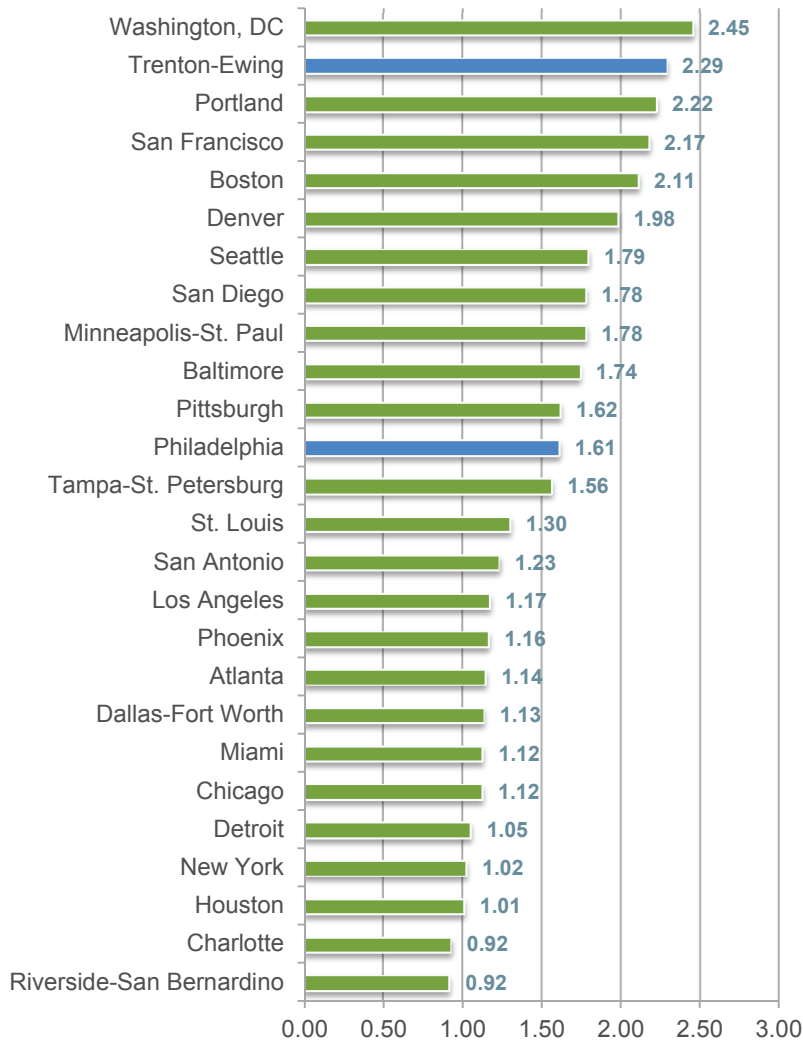
Rittenhouse Square, Philadelphia

**FIGURE 14: PERCENTAGE OF CITY RESIDENTS WITH WALKABLE PARK ACCESS, 2014**



Source: The Trust for Public Land, 2015 City Park Facts. Park access is the ability to reach a publicly owned park within a half-mile walk on the road network, unobstructed by freeways, rivers, fences, and other obstacles. Data was available for the nation’s 40 largest cities, which does not include all cities discussed in this report.

**FIGURE 15: REGISTERED NONPROFITS DEDICATED TO ENVIRONMENTAL CAUSES PER 10,000 RESIDENTS, 2015**



Source: National Center for Charitable Statistics, November 2015. Includes all nonprofits that listed “Environmental and Animals” as their primary mission.

### Air Quality

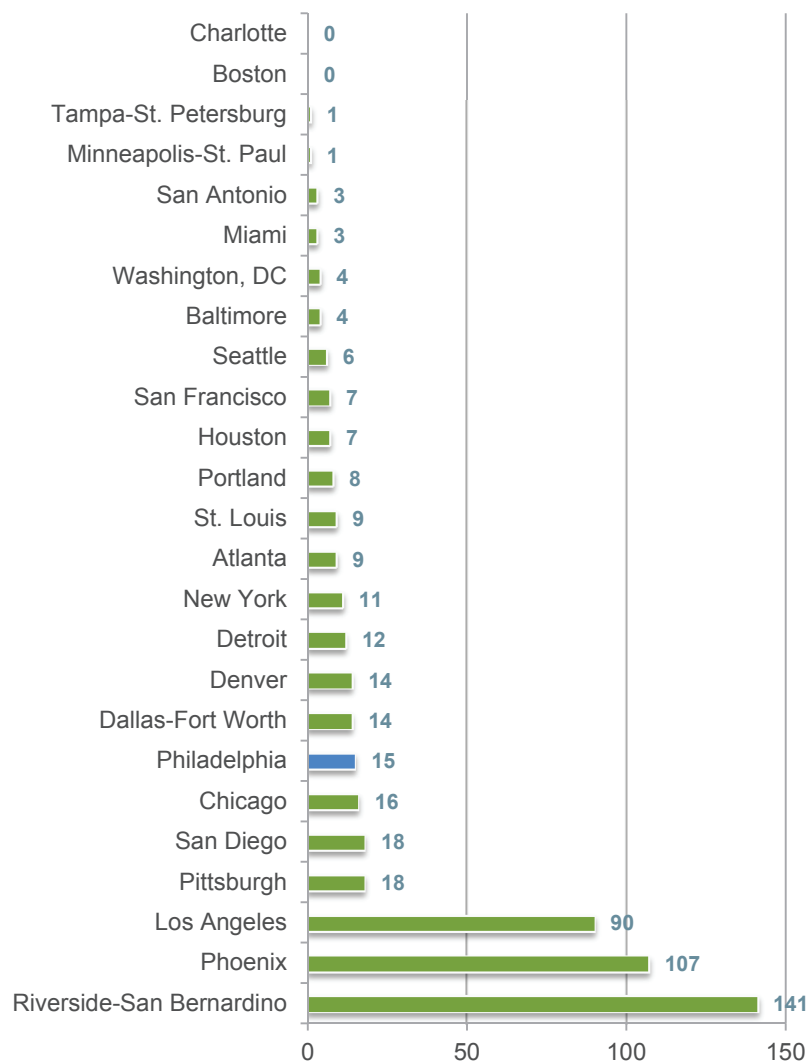
The 1990 Clean Air Act Amendments introduced a renewed federal commitment to air quality improvements and set the stage for states and regions to take action to protect the public health by reducing air pollution. Figure 16 provides data on the number of days that the metro areas exceeded National Ambient Air Quality Standards (NAAQS), including days rated as either “unhealthy for sensitive groups” (referred to as “code orange”) or “unhealthy” or “very unhealthy” for everyone (“code red”). With 15 days with an unhealthy air quality index, the Philadelphia metro area had the seventh highest number of days.

The Philadelphia region does not currently meet the NAAQS for ground-level ozone or fine particle (PM<sub>2.5</sub>) pollution. Ground-level ozone is the principal pollutant in the region. Both ozone and PM<sub>2.5</sub> levels are generally higher during the summer months, when weather conditions are conducive to ozone formation and local accumulation of PM<sub>2.5</sub> pollution; however, elevated levels of PM<sub>2.5</sub> have also occurred during the winter months.



*The Philadelphia skyline*

**FIGURE 16: DAYS WITH AN UNHEALTHY AIR QUALITY INDEX, 2014**



Source: U.S. Environmental Protection Agency's Air Explorer, 2014.

Air quality is greatly influenced by weather conditions, but the long-term trend indicates that pollution concentrations in the air are decreasing in the Philadelphia metro. Air quality monitoring shows that the frequency and duration of poor air quality episodes are also decreasing. The number of annual days of NAAQS violations for ozone or PM<sub>2.5</sub> pollution has trended downward, even while the standards were tightened.

Table 16 indicates the percentage change between 2005 and 2014 in the number of days with an unhealthy air quality index. With a reduction of 60 days annually, the Philadelphia region ranks seventh in absolute change. Since pollution concentrations in all years are compared against the most current NAAQS, the number of days shown to violate the air quality standards may be higher than the actual number of days that violated the standards that were in place during a given year.

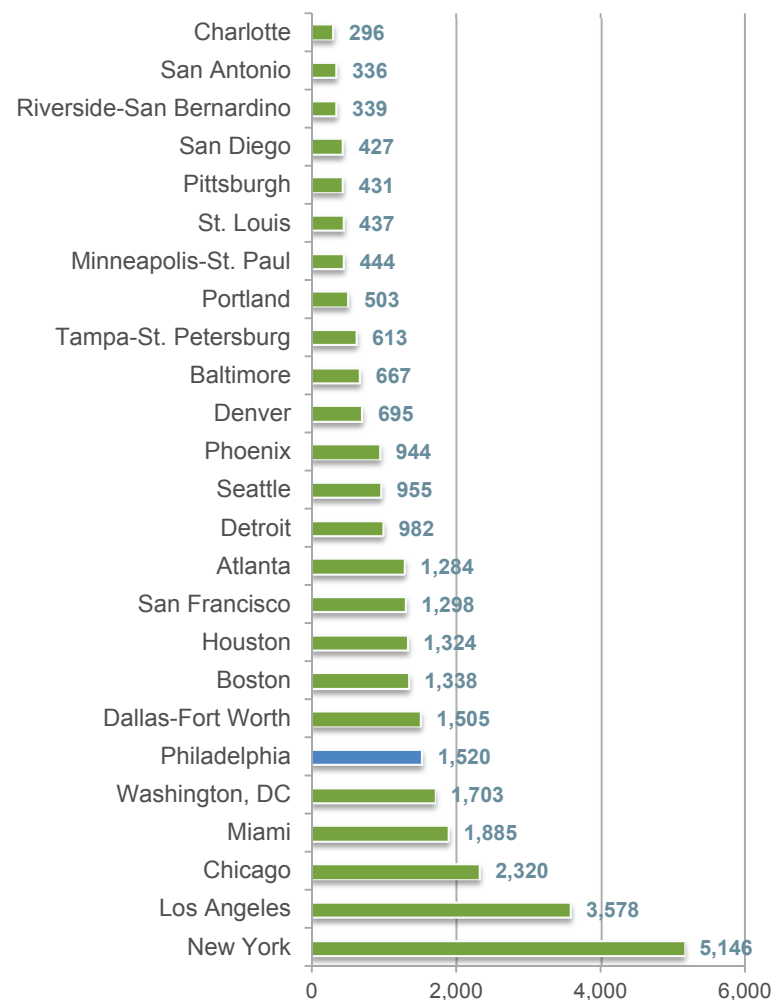
Figure 17 provides data on the amount of carbon dioxide produced by commuters driving automobiles during congested time periods. The Philadelphia metropolitan area ranks sixth highest, exceeded only by other large, densely developed metropolitan areas, including New York, Los Angeles, Chicago, Miami, and Washington, DC.

**TABLE 16: CHANGE IN THE NUMBER OF DAYS WITH AN UNHEALTHY AIR QUALITY INDEX, 2005 AND 2014**

METROPOLITAN AREA	2005	2014		CHANGE, 2005-2014			
		Days	Rank	Days	Rank	Percent	Rank
St. Louis	161	9	13 <sup>th</sup> (t)	-152	1 <sup>st</sup>	-94%	5 <sup>th</sup>
Pittsburgh	145	18	21 <sup>st</sup> (t)	-127	2 <sup>nd</sup>	-88%	10 <sup>th</sup>
Houston	102	7	10 <sup>th</sup> (t)	-95	3 <sup>rd</sup>	-93%	6 <sup>th</sup>
Detroit	98	12	16 <sup>th</sup>	-86	4 <sup>th</sup>	-88%	9 <sup>th</sup>
Dallas	85	14	17 <sup>th</sup> (t)	-71	5 <sup>th</sup>	-84%	12 <sup>th</sup>
Chicago	80	16	20 <sup>th</sup>	-64	6 <sup>th</sup>	-80%	14 <sup>th</sup> (t)
<b>Philadelphia</b>	<b>75</b>	<b>15</b>	<b>19<sup>th</sup></b>	<b>-60</b>	<b>7<sup>th</sup></b>	<b>-80%</b>	<b>14<sup>th</sup> (t)</b>
Tampa	56	1	3 <sup>rd</sup> (t)	-55	8 <sup>th</sup>	-98%	3 <sup>rd</sup>
Washington, DC	54	4	7 <sup>th</sup> (t)	-50	9 <sup>th</sup>	-93%	7 <sup>th</sup>
New York	61	11	15 <sup>th</sup>	-50	10 <sup>th</sup>	-82%	13 <sup>th</sup>
Atlanta	58	9	13 <sup>th</sup> (t)	-49	11 <sup>th</sup>	-84%	11 <sup>th</sup>
Baltimore	52	4	7 <sup>th</sup> (t)	-48	12 <sup>th</sup>	-92%	8 <sup>th</sup>
Charlotte	39	0	1 <sup>st</sup> (t)	-39	13 <sup>th</sup>	-100%	1 <sup>st</sup> (t)
Los Angeles	126	90	23 <sup>rd</sup>	-36	14 <sup>th</sup>	-29%	23 <sup>rd</sup>
Boston	31	0	1 <sup>st</sup> (t)	-31	15 <sup>th</sup>	-100%	1 <sup>st</sup> (t)
Minneapolis	19	1	3 <sup>rd</sup> (t)	-18	16 <sup>th</sup>	-95%	4 <sup>th</sup>
Seattle	23	6	9 <sup>th</sup>	-17	17 <sup>th</sup>	-74%	17 <sup>th</sup>
San Diego	34	18	21 <sup>st</sup> (t)	-16	18 <sup>th</sup>	-47%	19 <sup>th</sup>
Riverside	154	141	25 <sup>th</sup>	-13	19 <sup>th</sup>	-8%	24 <sup>th</sup>
San Antonio	15	3	5 <sup>th</sup> (t)	-12	20 <sup>th</sup>	-80%	14 <sup>th</sup> (t)
San Francisco	17	7	10 <sup>th</sup> (t)	-10	21 <sup>st</sup>	-59%	18 <sup>th</sup>
Denver	23	14	17 <sup>th</sup> (t)	-9	22 <sup>nd</sup>	-39%	22 <sup>nd</sup>
Portland	15	8	12 <sup>th</sup>	-7	23 <sup>rd</sup>	-47%	20 <sup>th</sup>
Miami	5	3	5 <sup>th</sup> (t)	-2	24 <sup>th</sup>	-40%	21 <sup>st</sup>
Phoenix	66	107	24 <sup>th</sup>	41	25 <sup>th</sup>	62%	25 <sup>th</sup>

Source: U.S. Environmental Protection Agency's Air Explorer, 2014. A (t) after the rank indicates a tie.

**FIGURE 17: CO<sub>2</sub> PRODUCTION BY COMMUTERS IN AUTOMOBILES DURING CONGESTED TIME PERIODS, 2012**



Source: Texas Transportation Institute 2012 Urban Mobility Report. Data is in millions of pounds. The data depicts the extra CO<sub>2</sub> emitted at reduced congested speeds rather than free-flow speed by private vehicles during peak travel times.

## Clean Jobs

Table 17 lists the number of clean jobs in each metro area as of 2010, as defined by the Brookings Institution. Clean industry employers, who together employ almost 2.7 million workers nationwide, are an important part of the national and regional economy. The goods and services produced and provided by clean businesses help reduce carbon emissions, and this growing sector offers above-average-wage jobs to workers with a wide range of skill levels. Given that over 73 percent of the green jobs in the Philadelphia metro region require less than a college degree yet offer an annual wage averaging over \$43,000, fostering growth in the sector can help to reduce income disparity between the city and its suburbs.<sup>1</sup>

The clean economy is comprised of a diverse set of businesses in a variety of industrial sectors. These companies are engaged in a wide range of activities, including both the manufacturing of clean products and public services, such as wastewater treatment and mass transit. The clean economy also includes newer alternative-energy-related industries, including solar photovoltaic (PV), wind, fuel cell, smart grid, biofuel, and battery industries.

Based on Brookings' definition, the Philadelphia metro area had over 54,000 clean jobs in 2010, ranking 5<sup>th</sup> (behind only New York, Los Angeles, Chicago, and Washington, DC). Clean economy jobs make up about two percent of all jobs in the region (ranking 6<sup>th</sup> among the major metros and approximately the same as the United States as a whole). The growth in clean jobs in the Philadelphia region, however, has not kept pace with growth in other major metro areas or the United States as a whole, with the percentage change in the region ranking 24<sup>th</sup>, well below the national growth rate of 3.6 percent and ahead of only St. Louis.

<sup>1</sup> Brookings Institution, "Sizing the Green Economy", July 2013.

TABLE 17: CLEAN JOBS, 2010

Metropolitan Area	Clean Jobs			Change In Clean Jobs, 2003-2010	
	Jobs	Percentage of all Jobs	Rank	Percentage	Rank
Portland	27,489	2.7%	1 <sup>st</sup>	4.1%	15 <sup>th</sup>
San Francisco	51,811	2.7%	2 <sup>nd</sup>	5.3%	5 <sup>th</sup>
Denver	27,929	2.3%	3 <sup>rd</sup>	4.7%	11 <sup>th</sup>
Washington, DC	70,828	2.3%	4 <sup>th</sup>	5.0%	10 <sup>th</sup>
Minneapolis-St. Paul	37,750	2.2%	5 <sup>th</sup>	5.2%	8 <sup>th</sup>
<b>Philadelphia</b>	<b>54,325</b>	<b>2.0%</b>	<b>6<sup>th</sup></b>	<b>1.9%</b>	<b>24<sup>th</sup></b>
<b>United States</b>	<b>2,675,545</b>	<b>2.0%</b>	<b>---</b>	<b>3.4%</b>	<b>---</b>
Riverside-San Bernardino	22,532	1.9%	7 <sup>th</sup>	4.0%	16 <sup>th</sup>
Pittsburgh	21,963	1.9%	8 <sup>th</sup>	3.7%	18 <sup>th</sup>
Charlotte	15,485	1.9%	9 <sup>th</sup>	4.7%	13 <sup>th</sup>
Atlanta	43,060	1.9%	10 <sup>th</sup>	5.9%	2 <sup>nd</sup>
Chicago	79,388	1.8%	11 <sup>th</sup>	3.7%	17 <sup>th</sup>
Seattle	31,340	1.8%	12 <sup>th</sup>	5.4%	4 <sup>th</sup>
New York	152,034	1.8%	13 <sup>th</sup>	5.5%	3 <sup>rd</sup>
Baltimore	22,619	1.7%	14 <sup>th</sup>	2.6%	23 <sup>rd</sup>
Boston	41,825	1.7%	15 <sup>th</sup>	3.0%	20 <sup>th</sup>
Los Angeles	89,592	1.7%	16 <sup>th</sup>	5.2%	7 <sup>th</sup>
San Diego	22,862	1.7%	17 <sup>th</sup>	6.9%	1 <sup>st</sup>
Houston	39,986	1.6%	18 <sup>th</sup>	5.3%	6 <sup>th</sup>
Tampa-St. Petersburg	15,347	1.3%	19 <sup>th</sup>	5.2%	9 <sup>th</sup>
Phoenix	22,904	1.3%	20 <sup>th</sup>	2.9%	22 <sup>nd</sup>
St. Louis	17,553	1.3%	21 <sup>st</sup>	1.5%	25 <sup>th</sup>
Dallas-Fort Worth	38,562	1.3%	22 <sup>nd</sup>	3.3%	19 <sup>th</sup>
San Antonio	10,634	1.2%	23 <sup>rd</sup>	4.3%	14 <sup>th</sup>
Detroit	20,323	1.2%	24 <sup>th</sup>	4.7%	12 <sup>th</sup>
Miami	24,194	1.1%	25 <sup>th</sup>	3.0%	21 <sup>st</sup>

Source: Brookings Institution, "Sizing the Green Economy", July 2013. "Clean jobs: are broadly defined by Brookings as jobs that produce goods and services that have an environmental benefit.



# LIVABLE COMMUNITIES

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## LIVABLE COMMUNITIES

Livable communities are places where people want to live, work, and play. Vibrant, mixed-use communities provide a unique sense of place, have existing infrastructure and institutions, and offer a high quality of life to their residents. This section considers variables that indicate how “livable” an area is, including housing costs and affordability; the cost of living; safety; arts, culture, and recreation; education; health care; and governance.

### *Housing Value and Costs*

As illustrated in Table 18, the median value of owner-occupied housing in 2014 in the Philadelphia metro was the 13<sup>th</sup> highest of the regions studied, just behind that in the Trenton-Ewing MSA. Housing value in Philadelphia was lower than the other East Coast metropolitan areas of Baltimore; Washington, DC; New York; and Boston. Figure 18 illustrates the change in median housing values between 2010 and 2014. When compared in constant 2010 dollars, housing values increased between 2010 and 2014 in 16 of the 26 metro areas studied, but decreased in Charlotte, Tampa, Baltimore, Atlanta, St. Louis, Minneapolis, Philadelphia (which, with a 5 percent decrease, ranked 23<sup>rd</sup>), New York, Trenton-Ewing, and Chicago.

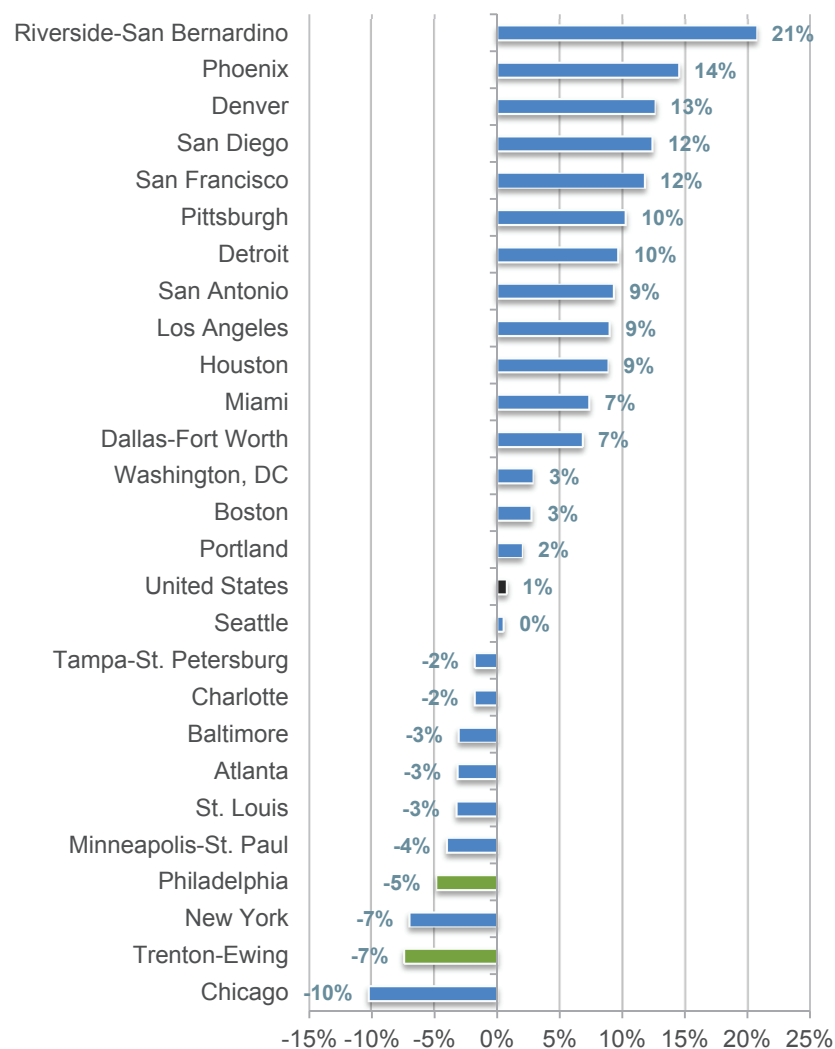
Table 19 provides data on the median monthly housing cost for owner-occupied housing units, ranking the metropolitan areas based on the percentage of owner occupants who pay 35 percent or more of their income towards their housing costs. At \$1,763 per month, the median monthly cost of homeownership in the Philadelphia metro is the 11<sup>th</sup> highest among the metros studied, but is still lower than in Baltimore; Boston; Washington, DC; Trenton-Ewing; and New York. When combined with each area’s median income, the Philadelphia metro area ranks 17<sup>th</sup>, with 25 percent of households that own their homes paying 35 percent or more of their income towards housing.

TABLE 18: MEDIAN HOUSING VALUE, 2010–2014

METROPOLITAN AREA	2010 (in \$1,000s)	2014		Change 2010-2014	
		Value	Rank	Percent	Rank
San Francisco	\$588.3	\$657.3	1 <sup>st</sup>	12%	4 <sup>th</sup>
Los Angeles	\$454.2	\$494.9	2 <sup>nd</sup>	9%	8 <sup>th</sup>
San Diego	\$407.0	\$457.3	3 <sup>rd</sup>	12%	5 <sup>th</sup>
New York	\$426.5	\$396.7	4 <sup>th</sup>	-7%	24 <sup>th</sup>
Washington, DC	\$376.2	\$386.9	5 <sup>th</sup>	3%	13 <sup>th</sup>
Boston	\$365.2	\$375.2	6 <sup>th</sup>	3%	14 <sup>th</sup>
Seattle	\$333.1	\$334.7	7 <sup>th</sup>	0%	16 <sup>th</sup>
Baltimore	\$288.7	\$279.9	8 <sup>th</sup>	-3%	19 <sup>th</sup>
Portland	\$271.7	\$277.1	9 <sup>th</sup>	2%	15 <sup>th</sup>
Denver	\$245.9	\$276.8	10 <sup>th</sup>	13%	3 <sup>rd</sup>
Riverside-San Bernardino	\$225.6	\$272.2	11 <sup>th</sup>	21%	1 <sup>st</sup>
Trenton-Ewing	<b>\$293.6</b>	<b>\$272.0</b>	<b>12<sup>th</sup></b>	<b>-7%</b>	<b>25<sup>th</sup></b>
Philadelphia	<b>\$246.3</b>	<b>\$234.4</b>	<b>13<sup>th</sup></b>	<b>-5%</b>	<b>23<sup>rd</sup></b>
Minneapolis-St. Paul	\$225.5	\$216.4	14 <sup>th</sup>	-4%	22 <sup>nd</sup>
Chicago	\$236.0	\$211.8	15 <sup>th</sup>	-10%	26 <sup>th</sup>
Miami	\$195.7	\$210.0	16 <sup>th</sup>	7%	11 <sup>th</sup>
Phoenix	\$172.9	\$197.9	17 <sup>th</sup>	14%	2 <sup>nd</sup>
<b>United States</b>	<b>\$179.9</b>	<b>\$181.2</b>	<b>---</b>	<b>0.7%</b>	<b>---</b>
Atlanta	\$175.9	\$170.3	18 <sup>th</sup>	-3%	20 <sup>th</sup>
Charlotte	\$172.5	\$169.4	19 <sup>th</sup>	-2%	17 <sup>th</sup>
Dallas-Fort Worth	\$150.4	\$160.6	20 <sup>th</sup>	7%	12 <sup>th</sup>
St. Louis	\$161.4	\$156.1	21 <sup>st</sup>	-3%	21 <sup>st</sup>
Houston	\$140.8	\$153.2	22 <sup>nd</sup>	9%	9 <sup>th</sup>
Tampa-St. Petersburg	\$152.2	\$149.5	23 <sup>rd</sup>	-2%	18 <sup>th</sup>
San Antonio	\$131.7	\$143.9	24 <sup>th</sup>	9%	10 <sup>th</sup>
Detroit	\$124.4	\$136.4	25 <sup>th</sup>	10%	6 <sup>th</sup>
Pittsburgh	\$122.2	\$134.7	26 <sup>th</sup>	10%	7 <sup>th</sup>

Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates. Values are in thousands of dollars.

**FIGURE 18: CHANGE IN MEDIAN HOUSING VALUE, 2010–2014**



Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates.

**TABLE 19: OWNER-OCCUPIED HOUSING COSTS, 2014**

METROPOLITAN AREA	Median Monthly Cost		Owner Households Paying 35 Percent or more of Their Income for Housing	
	Cost	Rank	Percent	Rank
Pittsburgh	\$1,227	1 <sup>st</sup>	17%	1 <sup>st</sup>
Minneapolis-St. Paul	\$1,594	11 <sup>th</sup>	18%	2 <sup>nd</sup>
St. Louis	\$1,314	3 <sup>rd</sup>	18%	3 <sup>rd</sup>
Charlotte	\$1,287	2 <sup>nd</sup>	19%	4 <sup>th</sup>
Denver	\$1,623	12 <sup>th</sup>	20%	5 <sup>th</sup>
San Antonio	\$1,351	7 <sup>th</sup>	20%	6 <sup>th</sup>
Houston	\$1,532	9 <sup>th</sup>	20%	7 <sup>th</sup>
Detroit	\$1,337	6 <sup>th</sup>	20%	8 <sup>th</sup>
Dallas-Fort Worth	\$1,544	10 <sup>th</sup>	20%	19 <sup>th</sup>
Washington, DC	\$2,202	21 <sup>st</sup>	21%	10 <sup>th</sup>
Phoenix	\$1,330	5 <sup>th</sup>	21%	11 <sup>th</sup>
Portland	\$1,679	14 <sup>th</sup>	22%	12 <sup>th</sup>
Atlanta	\$1,397	8 <sup>th</sup>	22%	13 <sup>th</sup>
<b>United States</b>	<b>\$1,454</b>	<b>---</b>	<b>23%</b>	<b>---</b>
Baltimore	\$1,842	18 <sup>th</sup>	23%	14 <sup>th</sup>
Seattle	\$1,950	19 <sup>th</sup>	23%	15 <sup>th</sup>
Boston	\$2,200	20 <sup>th</sup>	24%	16 <sup>th</sup>
<b>Philadelphia</b>	<b>\$1,763</b>	<b>16<sup>th</sup></b>	<b>25%</b>	<b>17<sup>th</sup></b>
Tampa-St. Petersburg	\$1,315	4 <sup>th</sup>	26%	18 <sup>th</sup>
Chicago	\$1,769	17 <sup>th</sup>	27%	19 <sup>th</sup>
San Francisco	\$2,637	26 <sup>th</sup>	29%	20 <sup>th</sup>
<b>Trenton-Ewing</b>	<b>\$2,291</b>	<b>24<sup>th</sup></b>	<b>30%</b>	<b>21<sup>st</sup></b>
San Diego	\$2,263	22 <sup>nd</sup>	32%	22 <sup>nd</sup>
Riverside-San Bernardino	\$1,681	15 <sup>th</sup>	32%	23 <sup>rd</sup>
New York	\$2,580	25 <sup>th</sup>	34%	24 <sup>th</sup>
Los Angeles	\$2,267	23 <sup>rd</sup>	35%	25 <sup>th</sup>
Miami	\$1,641	13 <sup>th</sup>	36%	26 <sup>th</sup>

Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates. This data includes only housing units with a mortgage.

As illustrated in Table 20, Philadelphia’s median monthly gross rent (which includes all utilities and fuels for which the renter is responsible), was \$1,020 in 2014, ranking as the 14th lowest of the metropolitan areas studied (again, lower than Trenton-Ewing; Baltimore; Boston; New York; and Washington, DC). Table 20 ranks the metros in order of the percentage of renter households who pay more than 35 percent of their income towards their rent. The fact that over 45 percent of the region’s renters paid 35 percent or more of their income towards housing is of concern, although this percentage is lower than Miami, Riverside, Los Angeles, and San Diego, and about the same as New York.

Rental housing affordability has declined both regionally and nationally since 1990. This may be the result of a number of factors, including a reduction in supply or an increased demand, as some renters who would historically move on to homeownership are unable to afford their first home. While the Philadelphia region continues to maintain its rank among large metropolitan areas as an affordable housing market, the cost of rental housing may be a cause for concern.

Table 21 lists the median sales price of single-family homes in 2012 and 2014, based on data from the National Association of Realtors. The sales price of single-family homes in the Philadelphia metro was the 13<sup>th</sup> highest among the 23 metros for which 2014 data was available. The region’s change in sales price since 2012, however, was the lowest among the 23 metros, having increased by only 3 percent since 2012. This lower percentage increase, however, may be due, at least in part, to the fact that the Philadelphia area was less impacted than other areas of the country when housing prices fell dramatically.

**TABLE 20: RENTAL HOUSING COSTS, 2014**

METROPOLITAN AREA	Median Monthly Cost		Rental Households Paying 35 Percent or More of Their Income for Housing	
	Cost	Rank	Percent	Rank
Pittsburgh	\$743	1 <sup>st</sup>	38%	1 <sup>st</sup>
Houston	\$937	6 <sup>th</sup>	39%	2 <sup>nd</sup>
Seattle	\$1,179	20 <sup>th</sup>	39%	3 <sup>rd</sup>
Charlotte	\$884	4 <sup>th</sup>	39%	4 <sup>th</sup>
Minneapolis-St. Paul	\$938	7 <sup>th</sup>	39%	5 <sup>th</sup>
Washington, DC	\$1,525	25 <sup>th</sup>	39%	6 <sup>th</sup>
St. Louis	\$817	2 <sup>nd</sup>	40%	7 <sup>th</sup>
Boston	\$1,247	21 <sup>st</sup>	40%	8 <sup>th</sup>
Dallas-Fort Worth	\$949	8 <sup>th</sup>	40%	9 <sup>th</sup>
Denver	\$1,078	15 <sup>th</sup>	40%	10 <sup>th</sup>
San Antonio	\$899	5 <sup>th</sup>	40%	11 <sup>th</sup>
Phoenix	\$969	10 <sup>th</sup>	40%	12 <sup>th</sup>
San Francisco	\$1,519	25 <sup>th</sup>	41%	13 <sup>th</sup>
Baltimore	\$1,166	19 <sup>th</sup>	42%	14 <sup>th</sup>
<b>United States</b>	<b>\$954</b>	<b>---</b>	<b>43%</b>	<b>---</b>
Atlanta	\$982	11 <sup>th</sup>	43%	15 <sup>th</sup>
Chicago	\$990	12 <sup>th</sup>	43%	16 <sup>th</sup>
Portland	\$1,009	13 <sup>th</sup>	44%	17 <sup>th</sup>
Trenton-Ewing	<b>\$1,142</b>	<b>16<sup>th</sup></b>	<b>44%</b>	<b>18<sup>th</sup></b>
Detroit	\$853	3 <sup>rd</sup>	44%	19 <sup>th</sup>
Tampa-St. Petersburg	\$957	9 <sup>th</sup>	44%	20 <sup>th</sup>
Philadelphia	<b>\$1,020</b>	<b>14<sup>th</sup></b>	<b>45%</b>	<b>21<sup>st</sup></b>
New York	\$1,281	22 <sup>nd</sup>	45%	22 <sup>nd</sup>
San Diego	\$1,373	24 <sup>th</sup>	47%	23 <sup>rd</sup>
Los Angeles	\$1,309	23 <sup>rd</sup>	50%	24 <sup>th</sup>
Riverside-San Bernardino	\$1,159	18 <sup>th</sup>	51%	25 <sup>th</sup>
Miami	\$1,146	17 <sup>th</sup>	54%	26 <sup>th</sup>

Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates. Table lists both the actual number and the rank among the metros.

**TABLE 21: MEDIAN SALES PRICE OF SINGLE-FAMILY HOMES, 2012 AND 2014**

METROPOLITAN AREA	2010 (in \$1,000s)	2014		CHANGE	
		Value	Rank	Percent	Rank
Atlanta	\$101.4	\$159.5	21 <sup>st</sup>	36%	1 <sup>st</sup>
Riverside-San Bernardino	\$189.3	\$273.9	10 <sup>th</sup>	31%	2 <sup>nd</sup>
Los Angeles	\$327.5	\$449.5	3 <sup>rd</sup>	27%	3 <sup>rd</sup>
San Francisco	\$543.8	\$737.6	1 <sup>st</sup>	26%	4 <sup>th</sup>
Phoenix	\$147.6	\$198.5	16 <sup>th</sup>	26%	5 <sup>th</sup>
Miami	\$203.1	\$266.0	11 <sup>th</sup>	24%	6 <sup>th</sup>
San Diego	\$385.5	\$497.9	2 <sup>nd</sup>	23%	7 <sup>th</sup>
Charlotte	\$156.6	\$193.8	18 <sup>th</sup>	19%	8 <sup>th</sup>
Denver	\$252.4	\$310.2	8 <sup>th</sup>	19%	9 <sup>th</sup>
Portland	\$232.9	\$286.0	9 <sup>th</sup>	19%	10 <sup>th</sup>
Minneapolis-St. Paul	\$171.8	\$210.1	14 <sup>th</sup>	18%	11 <sup>th</sup>
Houston	\$164.8	\$198.4	17 <sup>th</sup>	17%	12 <sup>th</sup>
Seattle	\$300.4	\$356.6	7 <sup>th</sup>	16%	13 <sup>th</sup>
Baltimore	\$206.0	\$244.1	12 <sup>th</sup>	16%	14 <sup>th</sup>
Dallas-Fort Worth	\$159.3	\$188.3	19 <sup>th</sup>	15%	15 <sup>th</sup>
Chicago	\$175.3	\$205.9	15 <sup>th</sup>	15%	16 <sup>th</sup>
St. Louis	\$123.9	\$141.7	23 <sup>rd</sup>	13%	17 <sup>th</sup>
San Antonio	\$159.5	\$182.1	20 <sup>th</sup>	12%	18 <sup>th</sup>
Tampa-St. Petersburg	\$133.9	\$151.5	22 <sup>nd</sup>	12%	19 <sup>th</sup>
Boston	\$351.2	\$389.8	5 <sup>th</sup>	10%	20 <sup>th</sup>
Washington, DC	\$352.0	\$383.8	6 <sup>th</sup>	8%	21 <sup>st</sup>
New York	\$379.3	\$395.9	4 <sup>th</sup>	4%	22 <sup>nd</sup>
<b>Philadelphia</b>	<b>\$213.4</b>	<b>\$220.7</b>	<b>13<sup>th</sup></b>	<b>3%</b>	<b>23<sup>rd</sup></b>
Detroit	\$63.4	n/a	n/a	n/a	n/a
Pittsburgh	n/a	n/a	n/a	n/a	n/a

Source: National Association of Realtors. Metros are ranked by the percentage change between 2012 and 2014. Data was not available for Trenton-Ewing.

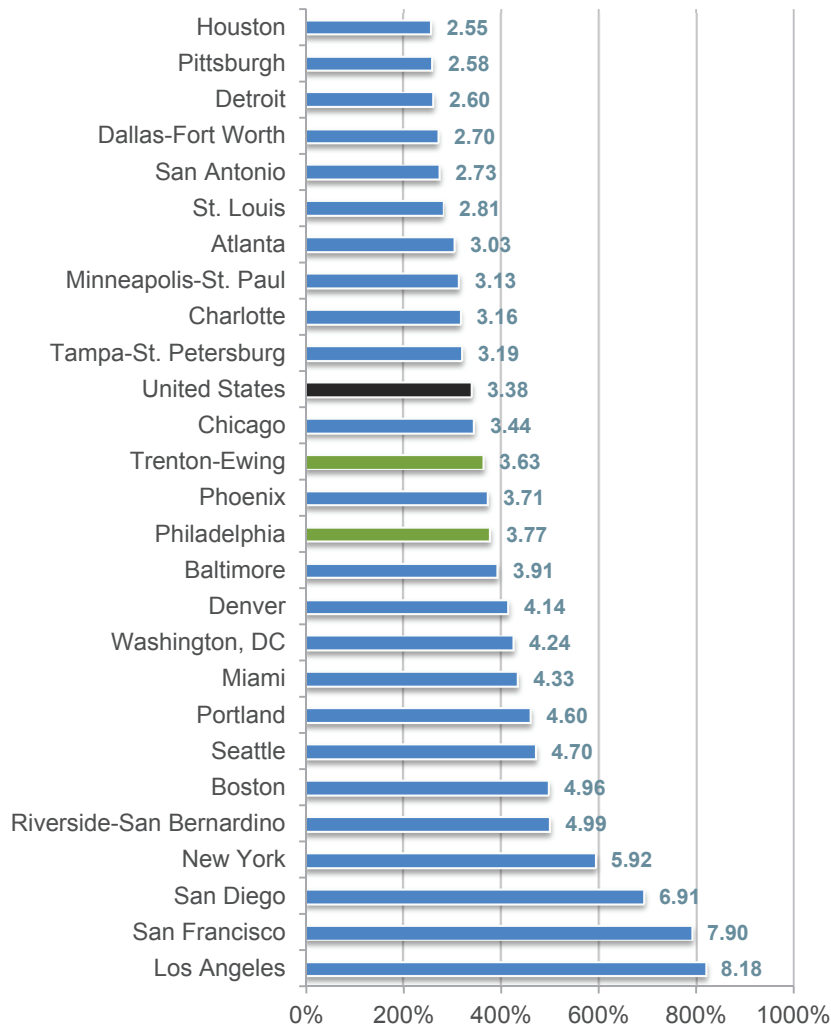
## Housing Affordability

Traditionally, housing affordability is measured in terms of the percentage of income that households pay toward their housing costs. The previous indicators discussed housing costs, and began to touch on affordability when considering the percentage of income spent towards housing in each metro. Figure 19 provides another indicator of affordability, illustrating the ratio between each area’s median housing value and its median household income. By this measure, Trenton-Ewing ranks 12<sup>th</sup> and the Philadelphia MSA ranks 14<sup>th</sup>, with ratios of 3.63 and 3.77, respectively.

More recently, planners and policy makers have recognized that considering only the percentage of income paid toward housing costs to benchmark affordability fails to take into account transportation costs, which are typically a household’s second largest expenditure. Transportation costs are largely a function of the characteristics of the neighborhood in which a household chooses to live. Dense, compact neighborhoods, that are pedestrian and bicycle friendly and offer access to jobs, transit, and a variety of businesses, are more efficient, affordable, and sustainable than the region’s typical low-density, auto-dependent suburbs.

The Center for Neighborhood Technology’s Housing and Transportation Index offers an expanded view of affordability, by combining housing and transportation costs and defining “affordable housing” as places where households pay no more than 45 percent of their income toward those combined costs. As indicated in Table 22, the Trenton-Ewing metro ranks eighth by this measure, and the Philadelphia metro ranks 10<sup>th</sup>, comparable to New York, at 51 percent. In Philadelphia, the relatively poor ranking for housing costs (17<sup>th</sup>) is countered by its 8<sup>th</sup> place ranking for average transportation costs. Based on the percent of the average household’s income spent on housing plus transportation, all of the top metros rank better than the United States average, primarily because of lower transportation costs.

**FIGURE 19: RATIO OF MEDIAN HOUSING VALUE TO MEDIAN HOUSEHOLD INCOME, 2014**



Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates.

**TABLE 22: PERCENTAGE OF INCOME SPENT ON HOUSING PLUS TRANSPORTATION COSTS, 2015**

METROPOLITAN AREA	HOUSING PLUS TRANSPORTATION COSTS	HOUSING COSTS		TRANSPORTATION COSTS	
		Percent	Rank	Percent	Rank
Washington, DC	42%	28%	2 <sup>nd</sup>	14%	1 <sup>st</sup>
Minneapolis-St. Paul	47%	28%	3 <sup>rd</sup>	20%	10 <sup>th</sup>
Baltimore	48%	30%	10 <sup>th</sup>	18%	6 <sup>th</sup>
Boston	49%	32%	16 <sup>th</sup>	17%	4 <sup>th</sup>
Denver	49%	29%	6 <sup>th</sup>	20%	11 <sup>th</sup>
San Francisco	50%	34%	20 <sup>th</sup>	16%	3 <sup>rd</sup>
Seattle	50%	31%	12 <sup>th</sup>	19%	7 <sup>th</sup>
<b>Trenton-Ewing</b>	<b>50%</b>	<b>33%</b>	<b>18<sup>th</sup></b>	<b>17%</b>	<b>5<sup>th</sup></b>
New York	51%	37%	23 <sup>rd</sup>	14%	2 <sup>nd</sup>
<b>Philadelphia</b>	<b>51%</b>	<b>32%</b>	<b>17<sup>th</sup></b>	<b>19%</b>	<b>8<sup>th</sup></b>
Pittsburgh	51%	27%	1 <sup>st</sup>	24%	20 <sup>th</sup>
St. Louis	51%	28%	4 <sup>th</sup>	23%	17 <sup>th</sup>
Dallas-Fort Worth	51%	29%	7 <sup>th</sup>	22%	15 <sup>th</sup>
Chicago	52%	33%	19 <sup>th</sup>	19%	9 <sup>th</sup>
Houston	52%	29%	8 <sup>th</sup>	22%	16 <sup>th</sup>
Portland	53%	31%	13 <sup>th</sup>	21%	13 <sup>th</sup>
San Antonio	53%	28%	5 <sup>th</sup>	25%	23 <sup>rd</sup>
Atlanta	54%	30%	11 <sup>th</sup>	23%	18 <sup>th</sup>
Charlotte	54%	29%	9 <sup>th</sup>	25%	24 <sup>th</sup>
Detroit	55%	31%	14 <sup>th</sup>	24%	21 <sup>st</sup>
Phoenix	55%	31%	15 <sup>th</sup>	24%	22 <sup>nd</sup>
San Diego	58%	37%	24 <sup>th</sup>	21%	14 <sup>th</sup>
Los Angeles	59%	38%	25 <sup>th</sup>	20%	12 <sup>th</sup>
Tampa-St. Petersburg	60%	35%	21 <sup>st</sup>	25%	25 <sup>th</sup>
Riverside-San Bernardino	61%	36%	22 <sup>nd</sup>	25%	26 <sup>th</sup>
Miami	64%	41%	26 <sup>th</sup>	23%	19 <sup>th</sup>
<b>United States</b>	<b>68%</b>	<b>33%</b>	<b>---</b>	<b>36%</b>	<b>---</b>

Source: Center for Neighborhood Technologies, December 2015. The percentages represent the percentage of income spent by a household earning the region's typical income.

## Cost of Living

Table 23 lists the consumer price index (CPI) for each metro area in 2005 and 2014, and ranks the metros by percentage change in the CPI. The CPI in the Philadelphia metro was the sixth highest of the 21 metros for which data is available, lower than only Seattle, San Francisco, Boston, New York, and San Diego. The Philadelphia metro ranks eighth, however, when considering the percentage change in the CPI between 2005 and 2014, with the CPI having increased by 20 percent over the decade.

Figure 20 shows the average cost-of-living adjusted wage, calculated by adjusting the average hourly earnings for all private-sector employees by the cost-of-living index published by the Council for Community and Economic Research. Adjusting wages for the cost of living better illustrates how far workers' paychecks will go in each metro area. Using this measure, the adjusted wage in the Philadelphia metro was the seventh lowest, but still ahead of Portland, San Francisco, Los Angeles, Miami, San Diego, and New York.

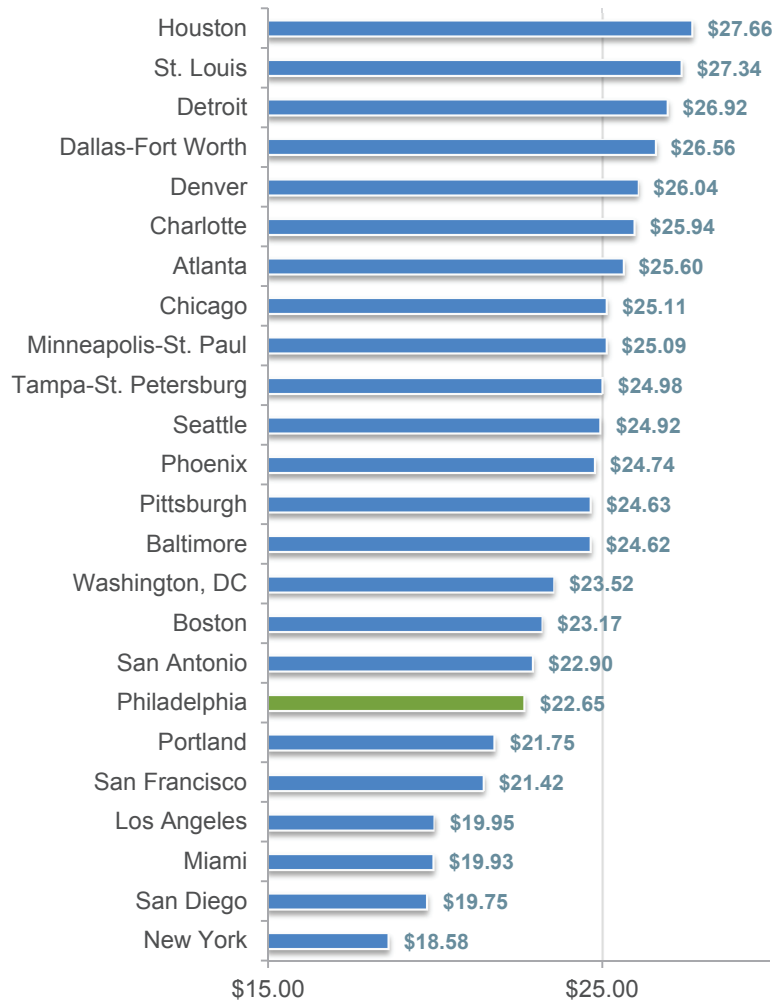
Another significant cost to residents in a region is their residential property taxes, whether they are homeowners who directly pay the tax, or renters, whose monthly rent incorporates it. Figure 21 illustrates the average property tax on each \$1,000 in home value, equalized to provide direct comparisons between the metros. With an average of \$16 per \$1,000 in home value, the Philadelphia area ranked 18th, while the Trenton-Ewing metro was the highest of the metros studied, with an average of \$25. These rates compare to a national average of \$12 per \$1,000 in home value; in Pennsylvania, the statewide average is \$15, while in New Jersey, the average is among the highest in the nation, at \$34.

**TABLE 23: CONSUMER PRICE INDEX, 2005 AND 2014**

METROPOLITAN AREA	2005	2014		CHANGE	
		CPI	Rank	Percent	Rank
Detroit	190.8	221.78	8 <sup>th</sup>	16%	1 <sup>st</sup>
Atlanta	188.9	220.97	7 <sup>th</sup>	17%	2 <sup>nd</sup>
Chicago	194.3	228.47	9 <sup>th</sup>	18%	3 <sup>rd</sup>
Boston	216.4	255.14	19 <sup>th</sup>	18%	4 <sup>th</sup>
Phoenix	108.3	127.82	1 <sup>st</sup>	18%	5 <sup>th</sup>
Dallas-Fort Worth	184.7	218.39	5 <sup>th</sup>	18%	6 <sup>th</sup>
St. Louis	186.2	220.22	6 <sup>th</sup>	18%	7 <sup>th</sup>
<b>Philadelphia</b>	<b>204.2</b>	<b>244.05</b>	<b>16<sup>th</sup></b>	<b>20%</b>	<b>8<sup>th</sup></b>
Los Angeles	201.8	242.43	14 <sup>th</sup>	20%	9 <sup>th</sup>
Minneapolis-St. Paul	193.1	232.01	10 <sup>th</sup>	20%	10 <sup>th</sup>
San Diego	220.6	265.15	21 <sup>st</sup>	20%	11 <sup>th</sup>
Houston	175.6	213.37	4 <sup>th</sup>	22%	12 <sup>th</sup>
New York	212.7	260.23	20 <sup>th</sup>	22%	13 <sup>th</sup>
Seattle	200.2	246.02	17 <sup>th</sup>	23%	14 <sup>th</sup>
Portland	196	241.22	13 <sup>th</sup>	23%	15 <sup>th</sup>
Denver	190.9	237.2	11 <sup>th</sup>	24%	16 <sup>th</sup>
San Francisco	202.7	251.99	18 <sup>th</sup>	24%	17 <sup>th</sup>
Washington, DC	124.3	154.85	2 <sup>nd</sup>	25%	18 <sup>th</sup>
Tampa-St. Petersburg	168.5	210.82	3 <sup>rd</sup>	25%	19 <sup>th</sup>
Miami	194.3	243.15	15 <sup>th</sup>	25%	20 <sup>th</sup>
Pittsburgh	189.8	238.96	12 <sup>th</sup>	26%	21 <sup>st</sup>
Baltimore	n/a	n/a	n/a	n/a	n/a
Charlotte	n/a	n/a	n/a	n/a	n/a
Riverside-San Bernardino	n/a	n/a	n/a	n/a	n/a
San Antonio	n/a	n/a	n/a	n/a	n/a

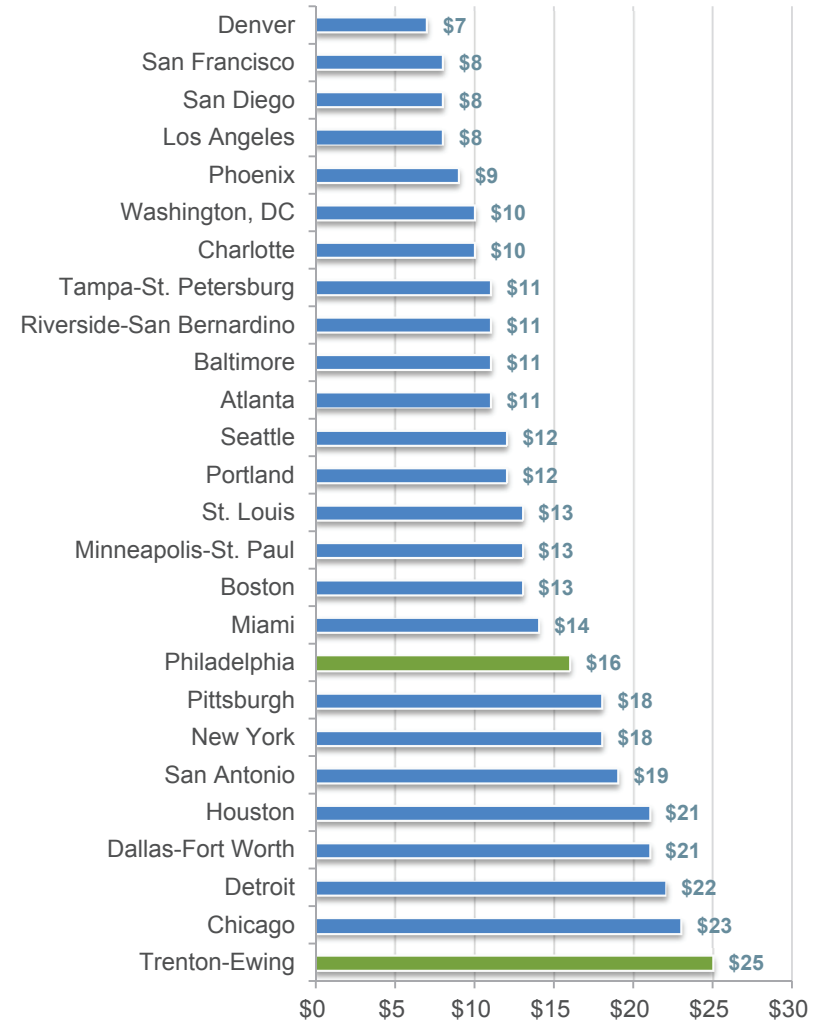
Source: U.S. Bureau of Labor Statistics (BLS). Number listed is for all items and all urban consumers. BLS does not calculate a separate CPI for the Trenton-Ewing MSA, but includes the area in the New York MSA.

**FIGURE 20: COST-OF-LIVING ADJUSTED WAGE, 2014**



Source: *Governing*, December 2015. The average hourly earnings for all private-sector employees were adjusted by the cost-of-living index published by the Council for Community and Economic Research. Adjusting wages for costs of living illustrates how far workers' paychecks will go in each metro area. Data was unavailable for the Riverside-San Bernardino and Trenton metro areas.

**FIGURE 21: EFFECTIVE PROPERTY TAX PER \$1,000 OF HOME VALUE, 2013**



Source: *Sperling's Best Places* (see <http://www.bestplaces.net/>).

## Crime

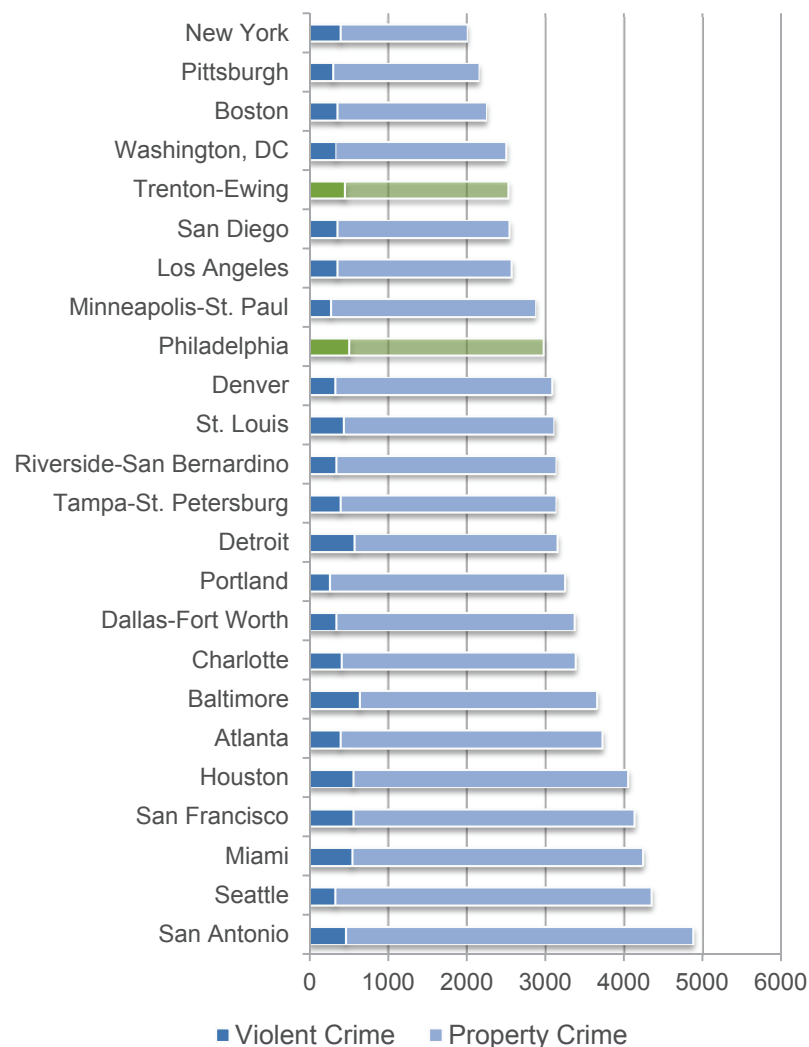
According to Federal Bureau of Investigation (FBI) statistics, the Trenton-Ewing metropolitan area has the fifth lowest crime rate of the regions studied (lower than only New York; Pittsburgh; Boston; and Washington, DC), and the Philadelphia region ranks ninth, as illustrated in Figure 22. The crime rate is reported as the number of crimes per 100,000 residents, including both violent crimes (murder, rape, robbery, and assault) and property crimes (larceny, burglary, and motor vehicle thefts). In all of the metros, the vast majority of crimes reported are property crimes, ranging from over 93 percent in Seattle to 80 percent in New York. As illustrated in Figure 23, the Trenton MSA had the third highest percentage of reported crimes that were violent crimes in 2013 (18 percent), and the Philadelphia MSA had the fifth highest percentage (17 percent).

Table 24 compares the percentage of each metro area's violent crimes that occurred in the primary city to the percentage of the metropolitan area's population living in the city. In Philadelphia, 57 percent of the metropolitan area's violent crimes occurred in the City of Philadelphia in 2013, even though only 26 percent of the region's population lived there. In the Trenton-Ewing MSA, 72 percent of violent crimes occurred in the City of Trenton, although only 22 percent of the region's population lived there.

## Arts, Culture, and Recreation

The metropolitan area comparisons presented in this report are primarily quantifiable measures collected by numerous federal agencies. Very little data is collected in any quantifiable form, however, for the arts and cultural resources that are so important when considering a region's quality of life. Figure 24 illustrates the number of registered nonprofits per capita that listed their primary mission as "arts, humanities, and culture." As was the case with environmental nonprofits, the Trenton-Ewing metro area ranks first and the Philadelphia metro ranks ninth.

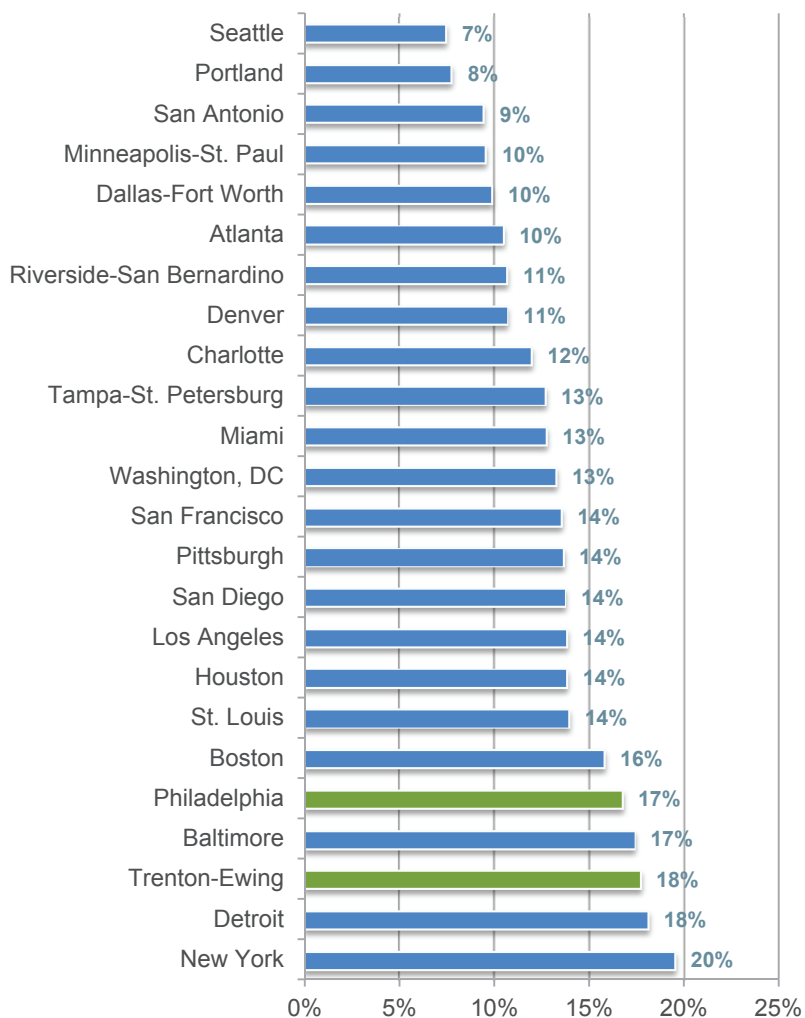
FIGURE 22: TOTAL CRIMES PER 100,000 RESIDENTS, 2013



Source: U.S. Federal Bureau of Investigation Uniform Crime Reports. Violent crime data for the Chicago MSA is unavailable, as is property crime data for the Phoenix MSA. Violent crimes include murder, manslaughter, rape, robbery, and aggravated assault.



**FIGURE 23: PERCENTAGE OF REPORTED CRIMES THAT WERE VIOLENT CRIMES, 2013**



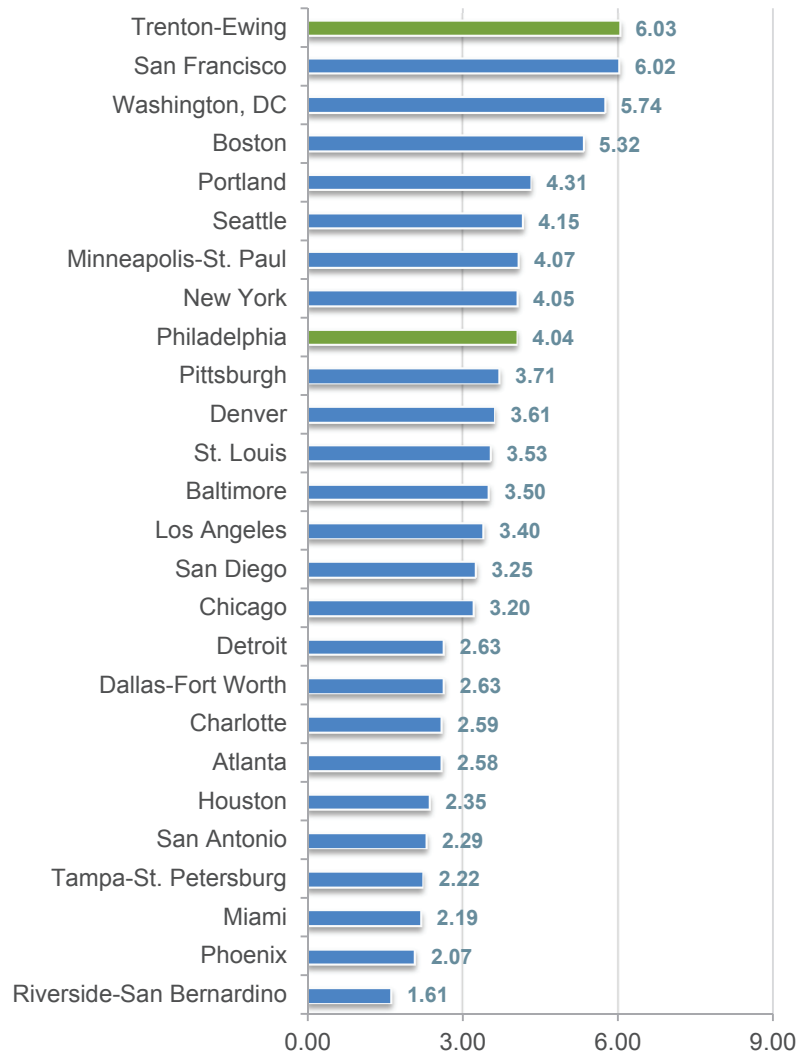
Source: U.S. Federal Bureau of Investigation Uniform Crime Reports. Violent crime data for the Chicago MSA is unavailable, nor is property crime data for the Phoenix MSA. Violent crimes include murder, manslaughter, rape, robbery, and aggravated assault.

**TABLE 24: PERCENTAGE OF VIOLENT CRIMES OCCURRING IN THE PRIMARY CITY VERSUS THE PERCENTAGE OF THE MSA POPULATION LIVING IN THE CITY, 2013**

PRIMARY CITY	PERCENTAGE OF THE MSA'S POPULATION	PERCENTAGE OF THE MSA'S VIOLENT CRIMES	DIFFERENCE
Riverside-San Bernardino	7%	9%	2%
San Diego	42%	47%	5%
Los Angeles	30%	36%	6%
Miami	7%	16%	9%
San Francisco	19%	28%	9%
Seattle	18%	32%	14%
Boston	14%	30%	16%
Atlanta	8%	26%	18%
Charlotte	36%	54%	18%
Dallas-Fort Worth	18%	36%	18%
Tampa-St. Petersburg	21%	39%	18%
Pittsburgh	13%	33%	20%
Phoenix	34%	55%	21%
Denver	24%	46%	22%
San Antonio	62%	85%	23%
Portland	26%	51%	24%
Houston	35%	60%	25%
New York	42%	67%	25%
Baltimore	23%	50%	27%
Washington, DC	11%	40%	29%
St. Louis	11%	42%	31%
Philadelphia	26%	57%	31%
Detroit	16%	59%	43%
Minneapolis-St. Paul	20%	66%	46%
Trenton-Ewing	22%	72%	50%

Source: U.S. Federal Bureau of Investigation Uniform Crime Reports. Violent crime data for the Chicago MSA is unavailable.

**FIGURE 24: REGISTERED NONPROFITS DEDICATED TO ARTS, HUMANITIES, AND CULTURE PER 10,000 RESIDENTS, 2015**



Source: National Center for Charitable Statistics, November 2015. Includes all nonprofits that listed “arts, humanities, and culture” as their primary mission.

### *Educational Opportunity*

The Philadelphia and Trenton-Ewing metro areas are home to a myriad of educational and research facilities that provide opportunities and resources to their residents, and the education and knowledge creation economic cluster is one of Philadelphia’s strongest. Table 25 lists the number of employees working for education and knowledge creation employers in 2010, and the number of education workers per 100 residents.

These employers include primary and secondary schools; colleges and universities; technical and trade schools; training facilities; education support services; and research and development institutions in life sciences, engineering, biotechnology, and social sciences. As of 2010, the Trenton-Ewing MSA boasts the second highest number of education workers per resident (behind only Boston), and the Philadelphia metro (which ranks sixth in the total number of education and knowledge creation workers), ranks tenth.



**University of Pennsylvania, Philadelphia**

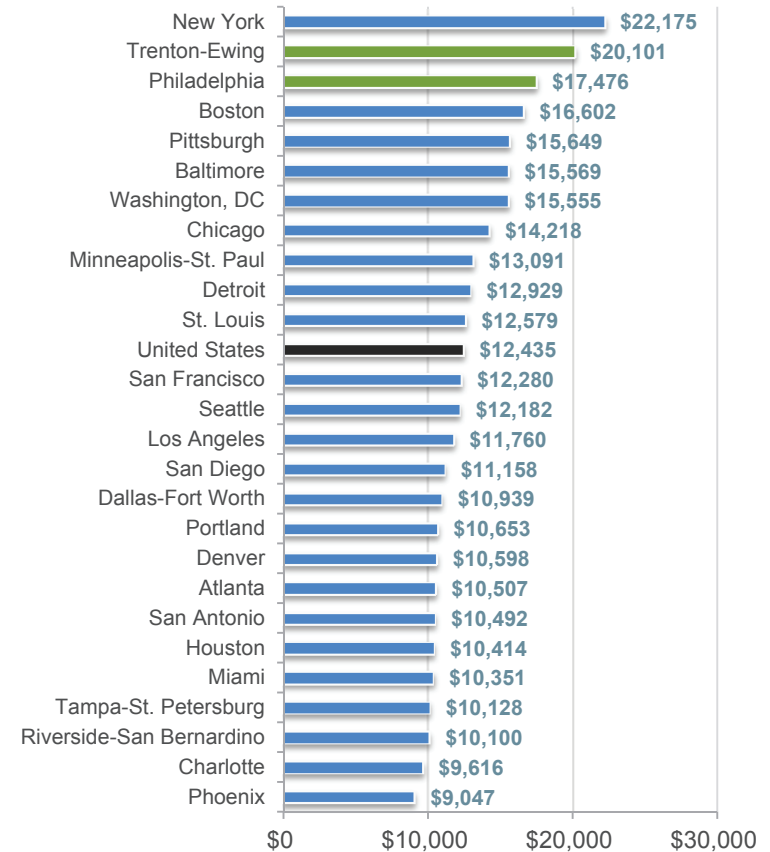
**TABLE 25: EDUCATION AND KNOWLEDGE CREATION WORKERS, 2010**

METROPOLITAN AREA	WORKERS		WORKERS PER 100 RESIDENTS	
	Number	Rank	Number	Rank
Boston	125,856	4 <sup>th</sup>	2.76	1 <sup>st</sup>
Trenton-Ewing	9,133	26 <sup>th</sup>	2.49	2 <sup>nd</sup>
Baltimore	63,767	12 <sup>th</sup>	2.35	3 <sup>rd</sup>
San Francisco	93,079	7 <sup>th</sup>	2.15	4 <sup>th</sup>
Washington, DC	118,105	5 <sup>th</sup>	2.10	5 <sup>th</sup>
Pittsburgh	47,271	17 <sup>th</sup>	2.01	6 <sup>th</sup>
New York	392,263	1 <sup>st</sup>	2.00	7 <sup>th</sup>
Seattle	67,841	11 <sup>th</sup>	1.97	8 <sup>th</sup>
Portland	43,208	18 <sup>th</sup>	1.94	9 <sup>th</sup>
Philadelphia	109,611	6 <sup>th</sup>	1.84	10 <sup>th</sup>
San Diego	55,784	16 <sup>th</sup>	1.80	11 <sup>th</sup>
Chicago	167,833	3 <sup>rd</sup>	1.77	12 <sup>th</sup>
Minneapolis-St. Paul	57,873	15 <sup>th</sup>	1.73	13 <sup>th</sup>
San Antonio	36,918	22 <sup>nd</sup>	1.72	14 <sup>th</sup>
Los Angeles	208,738	2 <sup>nd</sup>	1.63	15 <sup>th</sup>
Denver	39,512	20 <sup>th</sup>	1.55	16 <sup>th</sup>
Houston	87,735	8 <sup>th</sup>	1.48	17 <sup>th</sup>
St. Louis	40,117	19 <sup>th</sup>	1.44	18 <sup>th</sup>
Phoenix	59,969	13 <sup>th</sup>	1.43	19 <sup>th</sup>
Atlanta	71,485	10 <sup>th</sup>	1.35	20 <sup>th</sup>
Charlotte	29,797	25 <sup>th</sup>	1.34	21 <sup>st</sup>
Dallas-Fort Worth	81,255	9 <sup>th</sup>	1.26	22 <sup>nd</sup>
Tampa-St. Petersburg	32,298	23 <sup>rd</sup>	1.16	23 <sup>rd</sup>
Miami	59,128	14 <sup>th</sup>	1.06	24 <sup>th</sup>
Detroit	37,925	21 <sup>st</sup>	0.88	25 <sup>th</sup>
Riverside-San Bernardino	30,291	24 <sup>th</sup>	0.72	26 <sup>th</sup>

Source: DVRPC, "Data Snapshot 2:2: Regional Economic Cluster Analysis," October 2014. Data includes employees of educational and training institutions, related support services, and research and development institutions.

While school spending is obviously not a direct measure of school quality, the level of spending per student can indicate a level of public commitment towards providing quality education for its residents. As illustrated in Figure 25, the \$17,476 spent per student in the City of Philadelphia ranks third among the primary cities studied, and is well above the national average of \$12,435.

**FIGURE 25: SCHOOL SPENDING IN THE PRIMARY CITY, 2013**



Source: Sperling's Best Places (see [www.bestplaces.net/](http://www.bestplaces.net/)). The data is the dollar amount spent per student in the primary city; the national average is \$12,435.

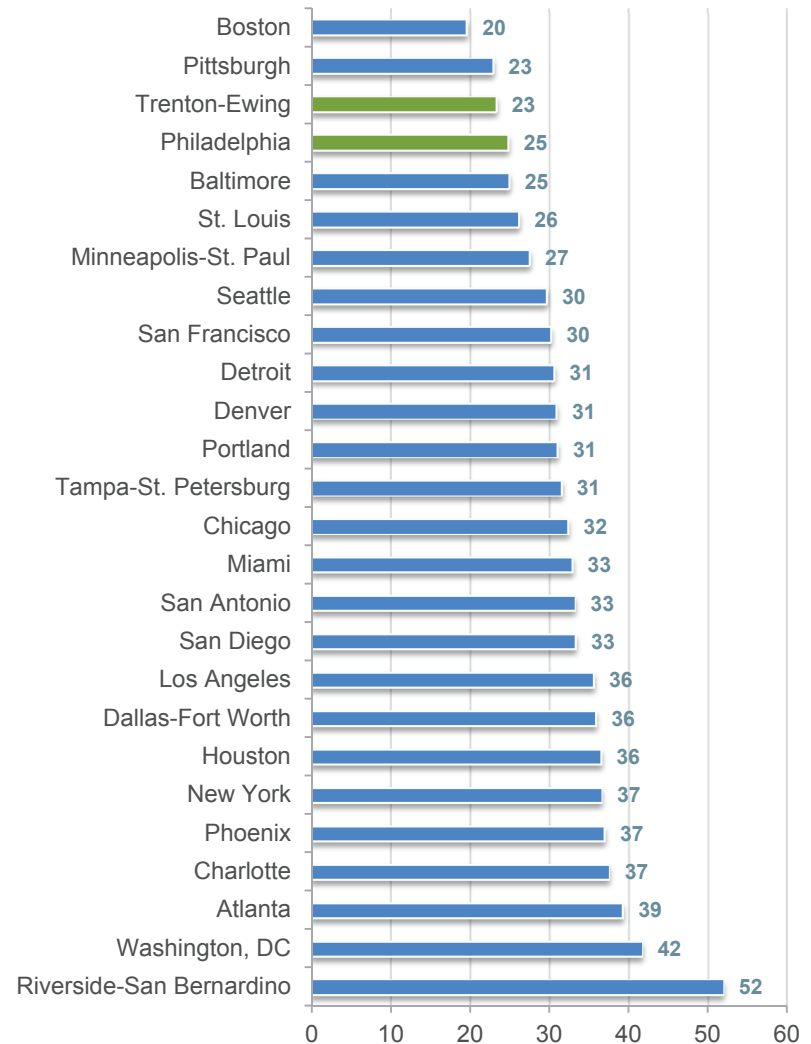
## Health Care

The Philadelphia and Trenton-Ewing metro areas are rich in health care resources. As illustrated in Figure 26, with only 23 and 25 residents per health care worker, respectively, the Trenton-Ewing and Philadelphia regions rank third and fourth, behind only Boston and Pittsburgh. The region also ranks second in the number of teaching hospitals and medical schools (behind only New York), with the majority of these teaching facilities concentrated in the City of Philadelphia.

Table 26 describes the number of residents per worker for three types of health care workers: physicians and medical scientists, medical technicians, and therapists and counselors. The Philadelphia MSA ranks second in the number of physicians or medical scientists per resident (behind only Boston), ninth in the number of medical technicians, and fourth in the number of therapists and counselors (behind Boston, Trenton-Ewing, and Pittsburgh).

Finally, as a related indicator of health and well-being, Figure 27 illustrates the 2012 “food hardship rate” for each of the nation’s 25 largest metropolitan areas. This rate indicates the percentage of households that reported, in response to a question posed by the Gallup organization, that there were times during the previous 12 months when they did not have enough money to buy the food that their household needed. The study, sponsored by the Food Research and Action Center, found that 17 percent of the nation’s households answered “yes” to the question. In the Philadelphia MSA, slightly fewer households than the national average (15.9 percent) experienced food hardship in 2012, ranking 12<sup>th</sup> among large metropolitan areas.

FIGURE 26: RESIDENTS PER HEALTH CARE WORKER, 2010



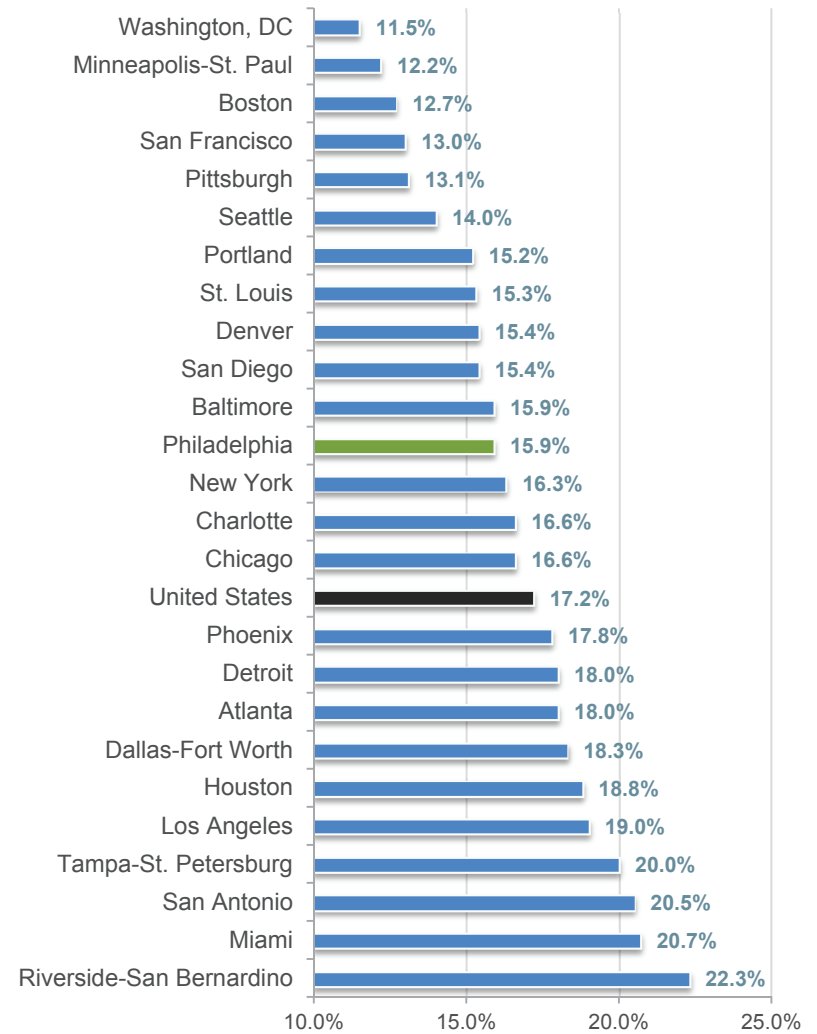
Source: Stats America, accessible at [www.statsamerica.com/innovation/anydata/index.asp](http://www.statsamerica.com/innovation/anydata/index.asp). “Health care workers” include physicians, medical scientists, medical technicians, therapists, counselors, and rehabilitation specialists.

**TABLE 26: RESIDENTS PER HEALTH CARE WORKER BY TYPE OF WORKER, 2010**

METROPOLITAN AREA	PHYSICIAN OR SCIENTIST		MEDICAL TECHNICIAN		THERAPIST OR COUNSELOR	
	Number	Rank	Number	Rank	Number	Rank
Boston	91	1 <sup>st</sup>	103	1 <sup>st</sup>	33	1 <sup>st</sup>
Philadelphia	119	2 <sup>nd</sup>	133	9 <sup>th</sup>	41	4 <sup>th</sup>
Baltimore	119	3 <sup>rd</sup>	123	3 <sup>rd</sup>	42	6 <sup>th</sup>
San Francisco	123	4 <sup>th</sup>	144	16 <sup>th</sup>	55	14 <sup>th</sup>
Trenton-Ewing	128	5 <sup>th</sup>	129	4 <sup>th</sup>	36	2 <sup>nd</sup>
Pittsburgh	130	6 <sup>th</sup>	110	2 <sup>nd</sup>	37	3 <sup>rd</sup>
San Diego	130	7 <sup>th</sup>	153	19 <sup>th</sup>	63	18 <sup>th</sup>
Minneapolis-St. Paul	139	8 <sup>th</sup>	129	5 <sup>th</sup>	47	7 <sup>th</sup>
New York	143	9 <sup>th</sup>	210	25 <sup>th</sup>	64	19 <sup>th</sup>
Seattle	144	10 <sup>th</sup>	138	15 <sup>th</sup>	51	8 <sup>th</sup>
Portland	147	11 <sup>th</sup>	137	14 <sup>th</sup>	55	13 <sup>th</sup>
St. Louis	149	12 <sup>th</sup>	136	12 <sup>th</sup>	41	5 <sup>th</sup>
Detroit	151	13 <sup>th</sup>	129	6 <sup>th</sup>	54	10 <sup>th</sup>
Chicago	155	14 <sup>th</sup>	171	22 <sup>nd</sup>	54	12 <sup>th</sup>
Los Angeles	157	15 <sup>th</sup>	156	20 <sup>th</sup>	65	21 <sup>st</sup>
Washington, DC	158	16 <sup>th</sup>	206	24 <sup>th</sup>	78	25 <sup>th</sup>
Denver	171	17 <sup>th</sup>	136	13 <sup>th</sup>	52	9 <sup>th</sup>
Houston	172	18 <sup>th</sup>	150	18 <sup>th</sup>	67	22 <sup>nd</sup>
Miami	173	19 <sup>th</sup>	131	7 <sup>th</sup>	59	16 <sup>th</sup>
Dallas-Fort Worth	173	20 <sup>th</sup>	149	17 <sup>th</sup>	65	20 <sup>th</sup>
Phoenix	174	21 <sup>st</sup>	134	10 <sup>th</sup>	72	23 <sup>rd</sup>
Tampa-St. Petersburg	177	22 <sup>nd</sup>	131	8 <sup>th</sup>	54	11 <sup>th</sup>
San Antonio	180	23 <sup>rd</sup>	134	11 <sup>th</sup>	58	15 <sup>th</sup>
Atlanta	181	24 <sup>th</sup>	164	21 <sup>st</sup>	72	24 <sup>th</sup>
Charlotte	209	25 <sup>th</sup>	189	23 <sup>rd</sup>	60	17 <sup>th</sup>
Riverside	279	26 <sup>th</sup>	221	26 <sup>th</sup>	90	26 <sup>th</sup>

Source: Stats America, accessible at [www.statsamerica.org/innovation/anydata/index.asp](http://www.statsamerica.org/innovation/anydata/index.asp).

**FIGURE 27: FOOD HARDSHIP RATE, 2012**



Source: Food Research and Action Center, 2012. Data indicates the percentage of families that responded “yes” to “Have there been times in the past twelve months when you did not have enough money to buy food that you or your family needed?” Comparable data for the Trenton-Ewing MSA is unavailable.

**TABLE 27: TOTAL GOVERNMENTS, 2012**

METROPOLITAN AREA	TOTAL GOVERNMENTS	PEOPLE PER GOVERNMENT		GOVERNMENTS PER 100,000 RESIDENTS					
				County		Local		Special Purpose	
				Number	Rank	Number	Rank	Number	Rank
Baltimore	40	67,762	1 <sup>st</sup>	0.22	16 <sup>th</sup>	0.74	2 <sup>nd</sup>	0.52	1 <sup>st</sup>
Washington, DC	154	36,599	2 <sup>nd</sup>	0.30	18 <sup>th</sup>	1.70	8 <sup>th</sup>	5.93	14 <sup>th</sup>
Los Angeles	466	27,530	3 <sup>rd</sup>	0.02	1 <sup>st</sup>	0.95	4 <sup>th</sup>	2.67	3 <sup>rd</sup>
Miami	288	19,322	4 <sup>th</sup>	0.05	3 <sup>rd</sup>	1.85	10 <sup>th</sup>	3.27	4 <sup>th</sup>
San Diego	163	18,990	5 <sup>th</sup>	0.03	2 <sup>nd</sup>	0.58	1 <sup>st</sup>	4.65	7 <sup>th</sup>
Phoenix	234	17,918	6 <sup>th</sup>	0.05	4 <sup>th</sup>	0.79	3 <sup>rd</sup>	4.75	8 <sup>th</sup>
Charlotte	124	17,879	7 <sup>th</sup>	0.45	23 <sup>rd</sup>	3.20	16 <sup>th</sup>	1.94	2 <sup>nd</sup>
Atlanta	360	14,685	8 <sup>th</sup>	0.55	26 <sup>th</sup>	2.70	15 <sup>th</sup>	3.56	5 <sup>th</sup>
Riverside	303	13,943	9 <sup>th</sup>	0.05	5 <sup>th</sup>	1.23	5 <sup>th</sup>	5.89	12 <sup>th</sup>
Tampa-St. Petersburg	204	13,643	10 <sup>th</sup>	0.14	10 <sup>th</sup>	1.26	6 <sup>th</sup>	5.93	13 <sup>th</sup>
San Antonio	171	12,529	11 <sup>th</sup>	0.37	22 <sup>nd</sup>	2.38	13 <sup>th</sup>	5.23	9 <sup>th</sup>
New York	1,701	11,503	12 <sup>th</sup>	0.10	9 <sup>th</sup>	3.27	18 <sup>th</sup>	5.33	11 <sup>th</sup>
Dallas-Fort Worth	561	11,455	13 <sup>th</sup>	0.20	15 <sup>th</sup>	3.22	17 <sup>th</sup>	5.31	10 <sup>th</sup>
San Francisco	382	11,349	14 <sup>th</sup>	0.09	6 <sup>th</sup>	1.50	7 <sup>th</sup>	7.22	17 <sup>th</sup>
Detroit	379	11,336	15 <sup>th</sup>	0.14	11 <sup>th</sup>	4.82	21 <sup>st</sup>	3.86	6 <sup>th</sup>
Trenton-Ewing	36	10,181	16 <sup>th</sup>	0.27	17 <sup>th</sup>	3.50	19 <sup>th</sup>	6.00	16 <sup>th</sup>
Seattle	341	10,087	17 <sup>th</sup>	0.09	7 <sup>th</sup>	2.27	12 <sup>th</sup>	7.56	19 <sup>th</sup>
Boston	473	9,625	18 <sup>th</sup>	0.09	8 <sup>th</sup>	4.33	20 <sup>th</sup>	5.97	15 <sup>th</sup>
Portland	293	7,597	19 <sup>th</sup>	0.31	20 <sup>th</sup>	2.65	14 <sup>th</sup>	10.20	21 <sup>st</sup>
Philadelphia	772	7,288	20 <sup>th</sup>	0.14	12 <sup>th</sup>	6.26	23 <sup>rd</sup>	7.32	18 <sup>th</sup>
Chicago	1,655	5,717	21 <sup>st</sup>	0.15	13 <sup>th</sup>	5.90	22 <sup>nd</sup>	11.45	22 <sup>nd</sup>
Houston	1,055	5,612	22 <sup>nd</sup>	0.15	14 <sup>th</sup>	2.09	11 <sup>th</sup>	15.57	23 <sup>rd</sup>
Minneapolis-St. Paul	669	5,006	23 <sup>rd</sup>	0.48	24 <sup>th</sup>	11.82	24 <sup>th</sup>	7.67	20 <sup>th</sup>
St. Louis	1,034	2,696	24 <sup>th</sup>	0.50	25 <sup>th</sup>	13.63	25 <sup>th</sup>	22.96	25 <sup>th</sup>
Pittsburgh	882	2,672	25 <sup>th</sup>	0.30	19 <sup>th</sup>	19.35	26 <sup>th</sup>	17.78	24 <sup>th</sup>
Denver	1,043	2,439	26 <sup>th</sup>	0.31	21 <sup>st</sup>	1.77	9 <sup>th</sup>	38.92	26 <sup>th</sup>

Source: U.S. Census Bureau, 2012 Census of Local Governments. Data includes both actual number and rank; metros are ranked by people per government.

## Governance

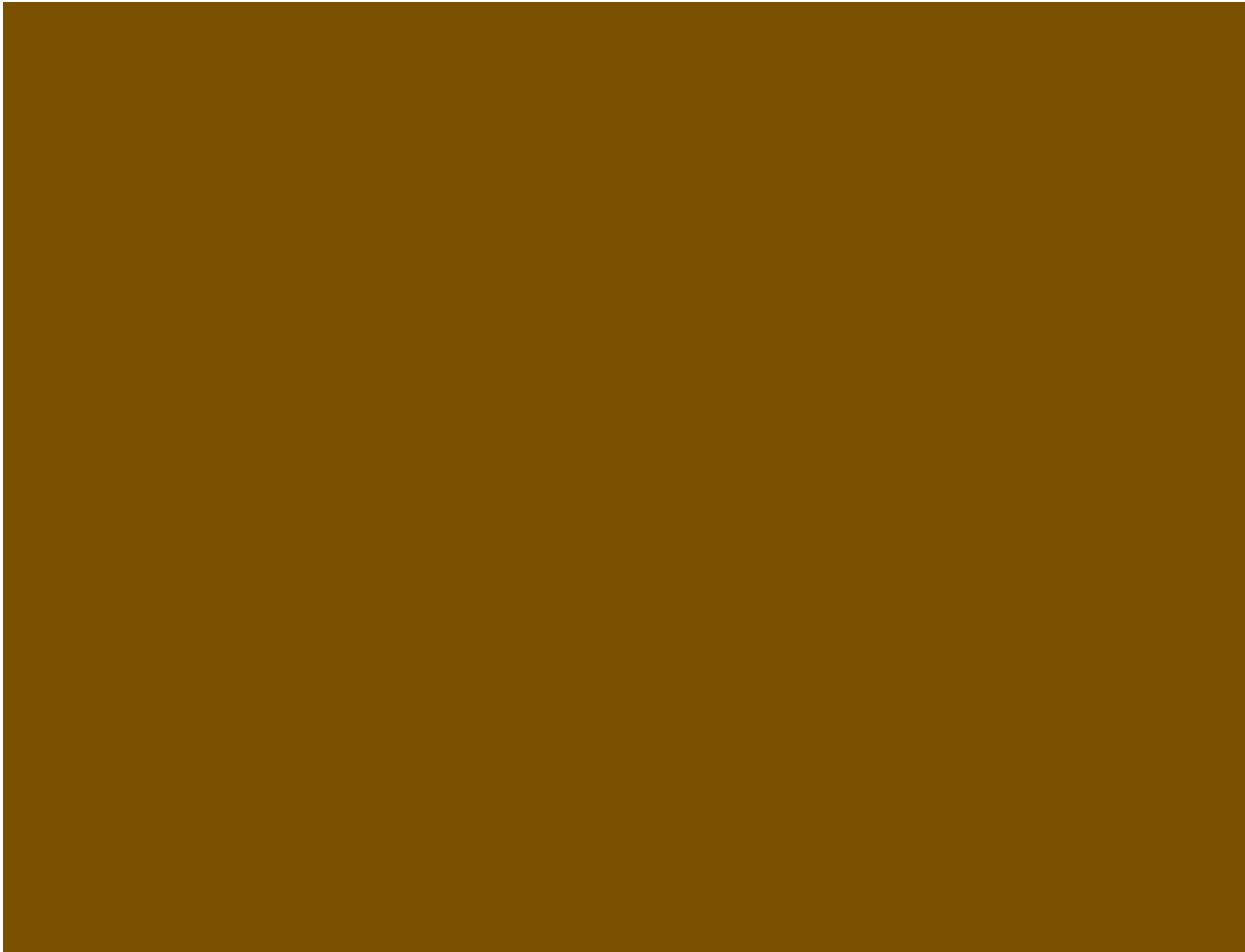
The Philadelphia region is politically fragmented, evidenced by its total number of governments, the number of governments per capita, and the number of people served by each government. As indicated in Table 27, only Pittsburgh, St. Louis, Denver, Houston, Chicago, and New York have more governmental entities than the Philadelphia region, and only Chicago, Houston, Minneapolis-St. Paul, St. Louis, Pittsburgh, and Denver have fewer people represented per government.

The majority of the governments in the Philadelphia region are municipal governments and other local governmental entities, including school districts, and water and sewer authorities. The region ranks 23rd in the number of local governments per capita, ahead of only Minneapolis-St. Paul, St. Louis, and Pittsburgh. Although home rule enhances the ability of local governments to effectively respond to their constituents' unique needs, having so many government agencies also poses a greater risk of institutional overlap and parochialism.

The background of the slide is a solid olive-green color. In the upper right corner, a silver pen nib is shown pointing towards the center. The background features faint, semi-transparent images of a line graph with several data points and a bar chart with vertical bars of varying heights. The text 'THE ECONOMY' is centered in the middle of the slide in a bold, white, sans-serif font. Below the title is a thin white horizontal line. Underneath the line is the logo for 'dvrpc', which consists of a white circle containing a stylized percentage sign followed by the lowercase letters 'dvrpc' in a white, sans-serif font.

# THE ECONOMY

 dvrpc





## THE ECONOMY

### *Employment and Labor*

As illustrated in Table 28, the Philadelphia metropolitan area ranked seventh in employment in 2014 (with over 3.5 million jobs), down from sixth in 2004 after being overtaken by Houston. Job growth in the Philadelphia MSA trailed that of many other large metros between 2004 and 2014, with the region ranking 19th among the major metropolitan areas studied.

Several of the metropolitan areas have concentrations of industries in specific sectors, as indicated in Table 29. Washington, DC, for example, has the highest concentration of public-sector jobs; Houston, Detroit, Seattle, and Portland lead in manufacturing and construction; and San Francisco, Boston, and New York have high concentrations of finance, insurance, real estate, and information jobs. The Philadelphia region continues to show strength in the service sectors, particularly health care and education, along with Trenton-Ewing, Boston, Pittsburgh, Baltimore, and New York.

Table 30 identifies the percentage of each metro's employees by occupation, rather than by traditional North American Industry Classification System (NAICS) industrial sector. Occupation cluster analysis is a relatively new approach in economic development that focuses on the knowledge, skills, and abilities of the workforce. The Trenton-Ewing metro boasts the fourth-highest percentage of its workforce employed in management, business, sciences, or arts occupations (behind only Washington, DC; San Francisco; and Boston); while the Philadelphia metro has the eighth-highest percentage in the same category.

**TABLE 28: TOTAL EMPLOYMENT, 2004 AND 2014**

METROPOLITAN AREA	2004	2014		Change	
		Employees	Rank	Percent	Rank
New York	10,617,027	12,094,064	1 <sup>st</sup>	14%	13 <sup>th</sup>
Los Angeles	7,426,691	8,158,392	2 <sup>nd</sup>	10%	16 <sup>th</sup>
Chicago	5,438,430	5,802,279	3 <sup>rd</sup>	7%	20 <sup>th</sup>
Dallas-Fort Worth	3,526,614	4,464,571	4 <sup>th</sup>	27%	3 <sup>rd</sup>
Washington, DC	3,639,717	4,075,889	5 <sup>th</sup>	12%	15 <sup>th</sup>
Houston	2,972,563	3,945,191	6 <sup>th</sup>	33%	2 <sup>nd</sup>
<b>Philadelphia</b>	<b>3,308,038</b>	<b>3,564,216</b>	<b>7<sup>th</sup></b>	<b>8%</b>	<b>19<sup>th</sup></b>
Miami	3,036,493	3,554,117	8 <sup>th</sup>	17%	7 <sup>th</sup>
Atlanta	2,890,010	3,374,779	9 <sup>th</sup>	17%	8 <sup>th</sup>
Boston	2,966,396	3,322,513	10 <sup>th</sup>	12%	14 <sup>th</sup>
San Francisco	2,676,462	3,064,300	11 <sup>th</sup>	14%	12 <sup>th</sup>
Phoenix	2,112,466	2,448,608	12 <sup>th</sup>	16%	10 <sup>th</sup>
Detroit	2,466,487	2,429,818	13 <sup>th</sup>	-1%	25 <sup>th</sup>
Minneapolis-St. Paul	3,036,493	2,369,366	14 <sup>th</sup>	-22%	26 <sup>th</sup>
Seattle	2,040,482	2,365,079	15 <sup>th</sup>	16%	11 <sup>th</sup>
San Diego	1,822,367	1,977,874	16 <sup>th</sup>	9%	18 <sup>th</sup>
Portland	1,247,324	1,936,488	17 <sup>th</sup>	55%	1 <sup>st</sup>
Riverside	1,598,258	1,866,302	18 <sup>th</sup>	17%	9 <sup>th</sup>
Denver	1,537,435	1,837,288	19 <sup>th</sup>	20%	6 <sup>th</sup>
Baltimore	1,597,635	1,754,218	20 <sup>th</sup>	10%	17 <sup>th</sup>
St. Louis	1,645,645	1,702,859	21 <sup>st</sup>	3%	24 <sup>th</sup>
Tampa-St. Petersburg	1,518,405	1,590,096	22 <sup>nd</sup>	5%	23 <sup>rd</sup>
Pittsburgh	1,378,420	1,445,889	23 <sup>rd</sup>	5%	22 <sup>nd</sup>
Charlotte	1,146,453	1,409,063	24 <sup>th</sup>	23%	5 <sup>th</sup>
San Antonio	1,035,764	1,308,059	25 <sup>th</sup>	26%	4 <sup>th</sup>
<b>Trenton-Ewing</b>	<b>256,862</b>	<b>271,817</b>	<b>26<sup>th</sup></b>	<b>6%</b>	<b>21<sup>st</sup></b>

Source: U.S. Bureau of Economic Analysis, Table CA 3: Economic Profile. This data includes both full- and part-time employment.

**TABLE 29: EMPLOYMENT BY INDUSTRY SECTOR, 2013**

METROPOLITAN AREA	WHOLESALE OR RETAIL TRADE	MANUFACTURING AND CONSTRUCTION	FINANCE, INSURANCE, REAL ESTATE, AND INFORMATION	PROFESSIONAL OCCUPATIONS AND MANAGEMENT	EDUCATION AND HEALTH CARE	ARTS, ENTERTAINMENT, RECREATION, ACCOMODATIONS, AND FOOD SERVICES	OTHER
New York	18%	8%	13%	12%	22%	11%	16%
Los Angeles	18%	14%	12%	11%	16%	13%	16%
Chicago	17%	13%	10%	12%	18%	11%	17%
Dallas-Fort Worth	17%	13%	12%	12%	14%	12%	19%
Washington, DC	13%	7%	10%	23%	16%	12%	20%
Houston	17%	17%	8%	14%	14%	11%	14%
<b>Philadelphia</b>	<b>17%</b>	<b>12%</b>	<b>11%</b>	<b>12%</b>	<b>24%</b>	<b>10%</b>	<b>19%</b>
Miami	22%	7%	10%	9%	18%	15%	20%
Atlanta	19%	11%	12%	13%	14%	12%	13%
Boston	15%	10%	13%	13%	25%	11%	20%
San Francisco	16%	11%	15%	14%	16%	13%	18%
Phoenix	18%	12%	12%	9%	18%	13%	16%
Detroit	17%	16%	9%	14%	18%	11%	15%
Minneapolis-St. Paul	16%	14%	12%	14%	18%	11%	15%
Seattle	16%	16%	13%	12%	16%	12%	18%
San Diego	18%	14%	10%	13%	16%	16%	16%
Portland	19%	16%	10%	12%	17%	12%	19%
Riverside-San Bernardino	22%	15%	6%	4%	17%	15%	15%
Denver	17%	11%	13%	14%	15%	13%	15%
Baltimore	17%	11%	9%	14%	23%	11%	19%
St. Louis	17%	13%	9%	12%	20%	13%	15%
Tampa-St. Petersburg	19%	10%	12%	11%	19%	13%	20%
Pittsburgh	16%	14%	9%	12%	24%	10%	16%
Charlotte	18%	14%	12%	10%	15%	12%	16%
San Antonio	17%	12%	13%	8%	18%	15%	15%
<b>Trenton-Ewing</b>	<b>17%</b>	<b>6%</b>	<b>12%</b>	<b>14%</b>	<b>30%</b>	<b>8%</b>	<b>17%</b>
<b>Peer Average</b>	<b>17%</b>	<b>12%</b>	<b>11%</b>	<b>12%</b>	<b>19%</b>	<b>12%</b>	<b>17%</b>

Source: U.S. Census Bureau, 2013 County Business Patterns.

**TABLE 30: EMPLOYMENT BY OCCUPATION, 2014**

METROPOLITAN AREA	MANAGEMENT, BUSINESS, SCIENCE, AND ARTS	SERVICES	SALES AND OFFICE OCCUPATIONS	NATURAL RESOURCES, CONSTRUCTION, AND MAINTENANCE	PRODUCTION, TRANSPORTATION, AND MATERIAL MOVING OCCUPATIONS
New York	41%	19%	23%	7%	9%
Los Angeles	37%	19%	25%	7%	12%
Chicago	38%	17%	25%	7%	13%
Dallas-Fort Worth	38%	16%	24%	9%	12%
Washington, DC	52%	16%	19%	7%	6%
Houston	37%	17%	23%	11%	12%
<b>Philadelphia</b>	<b>42%</b>	<b>17%</b>	<b>24%</b>	<b>7%</b>	<b>10%</b>
Miami	33%	21%	27%	9%	9%
Atlanta	40%	16%	25%	8%	11%
Boston	47%	17%	21%	6%	8%
San Francisco	48%	17%	21%	6%	8%
Phoenix	36%	19%	27%	9%	10%
Detroit	37%	18%	24%	7%	14%
Minneapolis-St. Paul	44%	16%	23%	6%	11%
Seattle	44%	17%	22%	7%	10%
Riverside-San Bernardino	29%	21%	25%	11%	15%
San Diego	42%	19%	23%	8%	8%
Denver	42%	17%	24%	9%	9%
Baltimore	45%	17%	23%	7%	8%
St. Louis	39%	17%	25%	7%	11%
Tampa-St. Petersburg	36%	19%	27%	8%	9%
Portland	40%	17%	23%	7%	12%
Pittsburgh	40%	17%	24%	8%	11%
Charlotte	38%	16%	25%	8%	13%
San Antonio	35%	19%	25%	10%	11%
<b>Trenton-Ewing</b>	<b>46%</b>	<b>18%</b>	<b>22%</b>	<b>5%</b>	<b>9%</b>
<b>Peer Average</b>	<b>40%</b>	<b>18%</b>	<b>24%</b>	<b>8%</b>	<b>10%</b>

Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates.

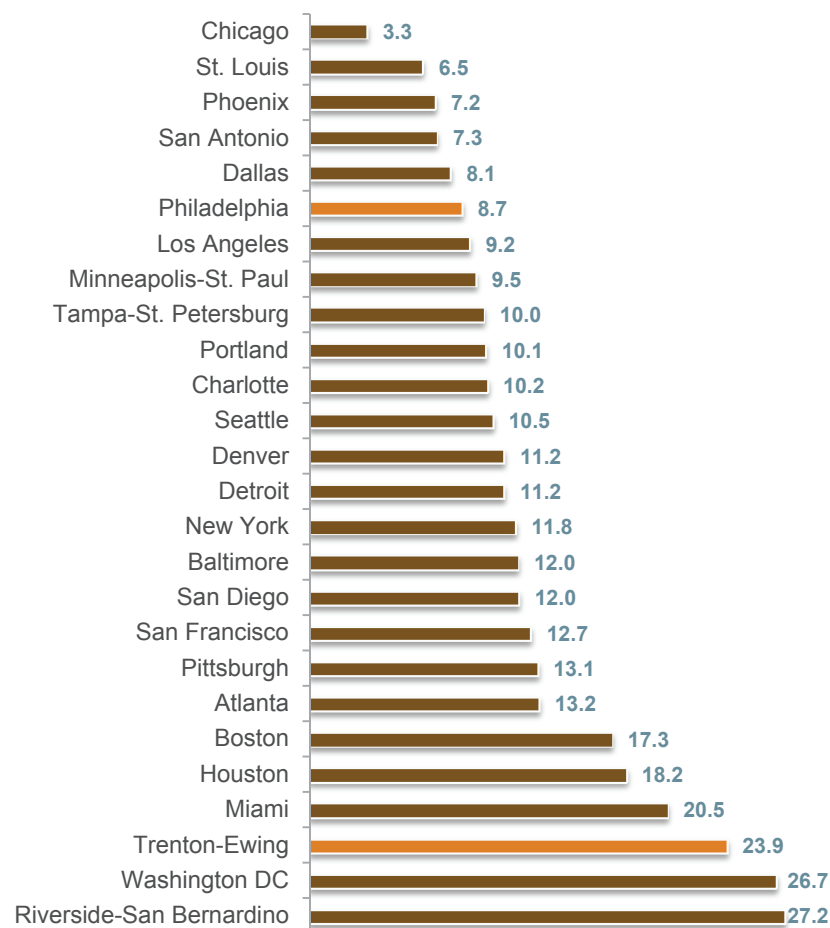
Philadelphia's strength, however, lies not in its dominance in any one industry but in its diversity. A diverse economy, while not "booming," is resilient, protected from the potential extremes in growth or decline that economies dependent on one or two primary industries often experience. Figure 28 illustrates a "diversity index", calculated by combining the absolute differences between the percentage of each metro's employment in the industrial sector employment categories listed in Table 29 and the average distribution among all of the metros studied. Based on this index, the Philadelphia region boasts the sixth most diverse regional economy.

Figure 29 and Table 31 present information on each metro area's unemployment rate. In 2015, the Philadelphia region's unemployment was 10<sup>th</sup> among the metros studied, at 4.6 percent, and the unemployment rate in the Trenton-Ewing MSA was slightly lower, at 4.2 percent. Both of these rates are below the average among all the metros and significantly less than other large metros such as Chicago, Los Angeles, Baltimore, and Detroit. Between November 2014 and November 2015, unemployment in all of the metros, except Houston, declined. With over-the-year decreases of 0.7 and 0.8 percent, respectively, the decrease in unemployment in both the Philadelphia and Trenton-Ewing metro areas was approximately the same as the average of the other metros.

Figure 30 illustrates the labor force participation rate in each metro area, defined as people between the ages of 16 and 64 who are either employed or unemployed but looking for work, but not including students, homemakers, or early retirees. At 64 percent, labor force participation in the Philadelphia metropolitan area is the seventh-lowest among the 25 metros, approximately the same as Miami (and the national rate) and ahead of only San Antonio, Los Angeles, New York, Phoenix, Tampa, and Detroit. Philadelphia's lower labor force participation rate is likely related to its older median age (as is the case in other metros with older populations, such as Detroit and Tampa), or

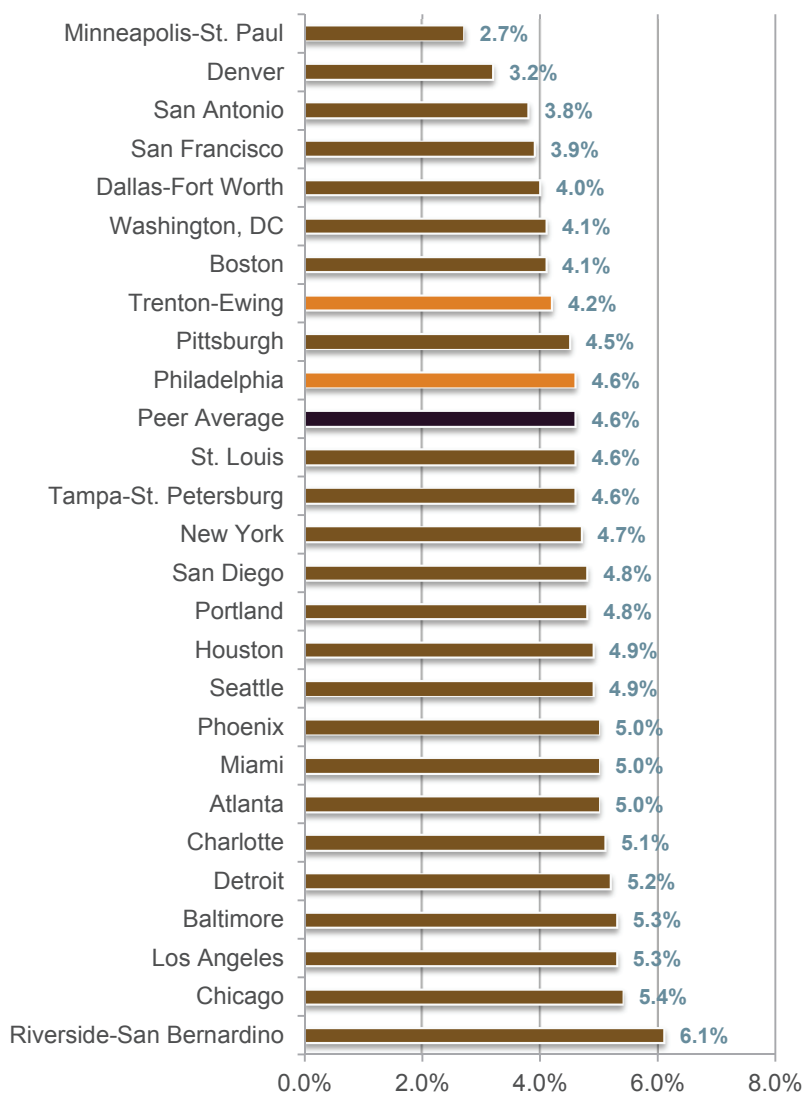
to relatively high urban unemployment, where larger percentages of adults are unemployed but not actively looking for work.

**FIGURE 28: DIVERSITY INDEX, 2013**



Source: Delaware Valley Regional Planning Commission, December 2015. Index indicates the absolute difference between the percent of each metro's employment in major sectors from the average employment distribution of all major metros; the lower the index, the more diverse the metro economy.

**FIGURE 29: UNEMPLOYMENT RATE, 2015**



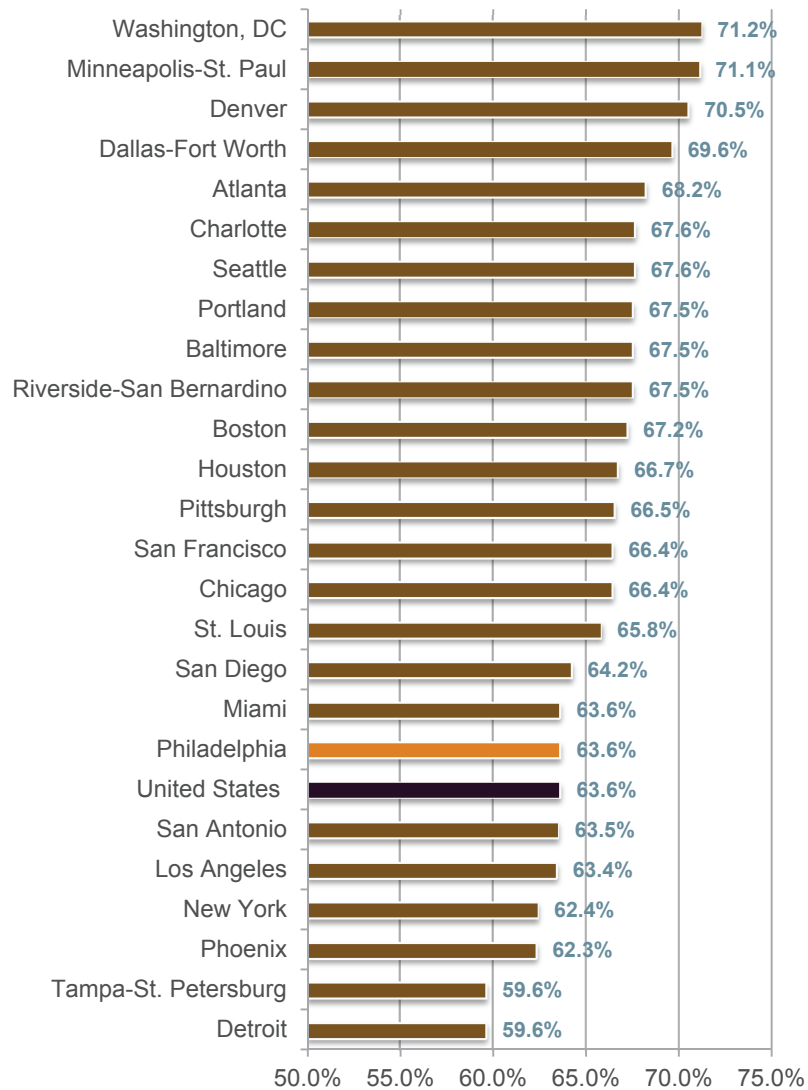
Source: U.S. Bureau of Labor Statistics, December 2015.

**TABLE 31: OVER-THE-YEAR CHANGE IN UNEMPLOYMENT, 2014–2015**

METROPOLITAN AREA	Nov-14	Nov-15		Change	
		Percent	Rank	Percent	Rank
Los Angeles	7.2%	5.3%	23 <sup>rd</sup>	-1.9%	1 <sup>st</sup>
Detroit	6.9%	5.2%	22 <sup>nd</sup>	-1.7%	2 <sup>nd</sup>
Riverside-San Bernardino	7.6%	6.1%	26 <sup>th</sup>	-1.5%	3 <sup>rd</sup>
Portland	6.0%	4.8%	14 <sup>th</sup>	-1.2%	4 <sup>th</sup>
San Diego	6.0%	4.8%	15 <sup>th</sup>	-1.2%	5 <sup>th</sup>
Atlanta	6.1%	5.0%	18 <sup>th</sup>	-1.1%	6 <sup>th</sup>
New York	5.8%	4.7%	13 <sup>th</sup>	-1.1%	7 <sup>th</sup>
Tampa-St. Petersburg	5.7%	4.6%	11 <sup>th</sup>	-1.1%	8 <sup>th</sup>
San Francisco	4.9%	3.9%	4 <sup>th</sup>	-1.0%	9 <sup>th</sup>
St. Louis	5.4%	4.6%	12 <sup>th</sup>	-0.8%	10 <sup>th</sup>
Denver	4.0%	3.2%	2 <sup>nd</sup>	-0.8%	11 <sup>th</sup>
Trenton-Ewing	5.0%	4.2%	8 <sup>th</sup>	-0.8%	12 <sup>th</sup>
Peer Average	5.4%	4.6%	---	-0.7%	---
Philadelphia	5.3%	4.6%	10 <sup>th</sup>	-0.7%	13 <sup>th</sup>
Miami	5.6%	5.0%	19 <sup>th</sup>	-0.6%	14 <sup>th</sup>
Phoenix	5.6%	5.0%	20 <sup>th</sup>	-0.6%	15 <sup>th</sup>
Chicago	5.9%	5.4%	25 <sup>th</sup>	-0.5%	16 <sup>th</sup>
Boston	4.6%	4.1%	6 <sup>th</sup>	-0.5%	17 <sup>th</sup>
Washington, DC	4.6%	4.1%	7 <sup>th</sup>	-0.5%	18 <sup>th</sup>
Baltimore	5.7%	5.3%	24 <sup>th</sup>	-0.4%	19 <sup>th</sup>
Dallas-Fort Worth	4.4%	4.0%	5 <sup>th</sup>	-0.4%	20 <sup>th</sup>
Minneapolis-St. Paul	3.1%	2.7%	1 <sup>st</sup>	-0.4%	21 <sup>st</sup>
Seattle	5.2%	4.9%	16 <sup>th</sup>	-0.3%	22 <sup>nd</sup>
Charlotte	5.3%	5.1%	21 <sup>st</sup>	-0.2%	23 <sup>rd</sup>
Pittsburgh	4.7%	4.5%	9 <sup>th</sup>	-0.2%	24 <sup>th</sup>
San Antonio	4.0%	3.8%	3 <sup>rd</sup>	-0.2%	25 <sup>th</sup>
Houston	4.3%	4.9%	17 <sup>th</sup>	0.6%	26 <sup>th</sup>

Source: U.S. Bureau of Labor Statistics, December 2015.

**FIGURE 30: LABOR FORCE PARTICIPATION RATE, 2013**



Source: U.S. Bureau of Labor Statistics, *Geographic Profile of Employment and Unemployment for Selected Metropolitan Areas, 2013*. Data was not available for the Trenton-Ewing MSA.

### *Income and Earnings*

Table 32 describes the average earnings per job in each of the metro areas (including both full- and part-time employment), and ranks the metros based on the percentage change in average earnings between 2004 and 2014. The Philadelphia region ranked eighth among the major metros in average earnings per job in 2014, and, at 25 percent, the growth in the region’s average wages was the eleventh highest. The average wage in the Trenton-Ewing metro was the fifth highest in 2014, behind only San Francisco; New York; Washington, DC; and Houston, while its growth rate between 2004 and 2014 (30 percent) was third highest, behind only Houston and Seattle. The 2014 average wage per job in the Philadelphia MSA was 13 percent higher than the average wage for the entire metropolitan portion of the United States (\$59,704), despite increasing at a slightly slower rate.

Table 33 and Figure 31 illustrate real per capita personal income, and the change in real per capita personal income between 2004 and 2014. In 2014, real per capita personal income in the Trenton-Ewing metro area was the fifth-highest among the 26 metros (having increased by 31 percent since 2004) and real per capita income in the Philadelphia metro was seventh (having increased by 36 percent).

Some caution is important in interpreting change in per capita personal income. The Bureau of Economic Analysis defines personal income as the income received by all persons from all sources, which is then divided by the number of residents. Price-adjusted estimates of per capita personal income are one of the best measures of overall economic prosperity, but it is only one measure and omits other aspects of quality of life and related measures. If the population of a metro area is falling, for example, the per capita personal income will increase even though there is no actual increase in total income. Similarly, high population growth areas may reflect lower per capita income growth.

**TABLE 32: AVERAGE EARNINGS PER JOB, 2004 AND 2014**

METROPOLITAN AREA	2004	2014		Change 2004-2014	
		Earnings	Rank	Percent	Rank
Houston	\$55,306	\$74,853	4 <sup>th</sup>	35%	1 <sup>st</sup>
Seattle	\$53,711	\$71,209	7 <sup>th</sup>	33%	2 <sup>nd</sup>
<b>Trenton-Ewing</b>	<b>\$57,362</b>	<b>\$74,819</b>	<b>5<sup>th</sup></b>	<b>30%</b>	<b>3<sup>rd</sup></b>
San Francisco	\$62,987	\$81,226	1 <sup>st</sup>	29%	4 <sup>th</sup>
San Antonio	\$40,182	\$51,627	23 <sup>rd</sup>	28%	5 <sup>th</sup>
Pittsburgh	\$46,311	\$59,458	16 <sup>th</sup>	28%	6 <sup>th</sup>
Washington, DC	\$60,184	\$77,018	3 <sup>rd</sup>	28%	7 <sup>th</sup>
Baltimore	\$49,809	\$63,149	11 <sup>th</sup>	27%	8 <sup>th</sup>
Boston	\$58,738	\$74,344	6 <sup>th</sup>	27%	9 <sup>th</sup>
Denver	\$51,164	\$64,384	9 <sup>th</sup>	26%	10 <sup>th</sup>
<b>United States</b>	<b>\$47,546</b>	<b>\$59,704</b>	<b>---</b>	<b>26%</b>	<b>---</b>
<b>Philadelphia</b>	<b>\$53,832</b>	<b>\$67,209</b>	<b>8<sup>th</sup></b>	<b>25%</b>	<b>11<sup>th</sup></b>
San Diego	\$50,065	\$62,501	13 <sup>th</sup>	25%	12 <sup>th</sup>
Minneapolis-St. Paul	\$49,630	\$61,796	15 <sup>th</sup>	25%	13 <sup>th</sup>
Dallas Fort Worth	\$50,360	\$62,680	12 <sup>th</sup>	24%	14 <sup>th</sup>
Tampa-St. Petersburg	\$40,780	\$50,568	24 <sup>th</sup>	24%	15 <sup>th</sup>
Portland	\$45,549	\$56,399	20 <sup>th</sup>	24%	16 <sup>th</sup>
St. Louis	\$45,303	\$55,896	21 <sup>st</sup>	23%	17 <sup>th</sup>
New York	\$62,506	\$77,037	2 <sup>nd</sup>	23%	18 <sup>th</sup>
Charlotte	\$47,130	\$57,483	18 <sup>th</sup>	22%	19 <sup>th</sup>
Phoenix	\$43,969	\$53,451	22 <sup>nd</sup>	22%	20 <sup>th</sup>
Chicago	\$53,005	\$63,687	10 <sup>th</sup>	20%	21 <sup>st</sup>
Los Angeles	\$52,689	\$61,926	14 <sup>th</sup>	18%	22 <sup>nd</sup>
Atlanta	\$49,807	\$57,168	19 <sup>th</sup>	15%	23 <sup>rd</sup>
Miami	\$43,344	\$49,709	25 <sup>th</sup>	15%	24 <sup>th</sup>
Detroit	\$52,791	\$58,738	17 <sup>th</sup>	11%	25 <sup>th</sup>
Riverside	\$41,773	\$46,330	26 <sup>th</sup>	11%	26 <sup>th</sup>

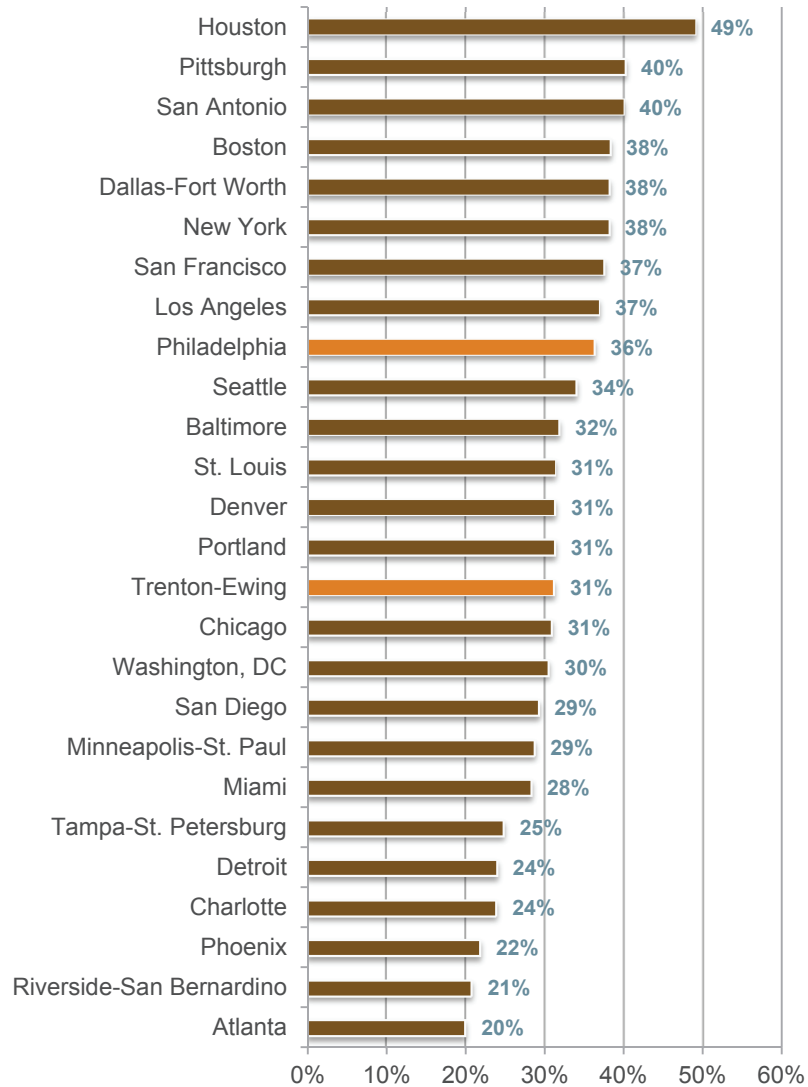
Source: U.S. Bureau of Economic Analysis (BEA), Table CA 30: Economic Profile. Data includes both full- and part-time employment. "United States" refers only to the metropolitan portion of the nation, as defined by BEA.

**TABLE 33: PER CAPITA PERSONAL INCOME, 2004 AND 2014**

METROPOLITAN AREA	2004	2014		Change 2004-2014	
		Income	Rank	Percent	Rank
San Francisco	\$52,642	\$72,364	1 <sup>st</sup>	37%	7 <sup>th</sup>
Boston	\$46,516	\$64,311	2 <sup>nd</sup>	38%	4 <sup>th</sup>
Washington, DC	\$48,269	\$62,975	3 <sup>rd</sup>	30%	17
New York	\$44,488	\$61,440	4 <sup>th</sup>	38%	5 <sup>th</sup>
<b>Trenton-Ewing</b>	<b>\$45,652</b>	<b>\$59,875</b>	<b>5<sup>th</sup></b>	<b>31%</b>	<b>12<sup>th</sup></b>
Seattle	\$43,460	\$58,205	6 <sup>th</sup>	34%	10 <sup>th</sup>
<b>Philadelphia</b>	<b>\$40,314</b>	<b>\$54,936</b>	<b>7<sup>th</sup></b>	<b>36%</b>	<b>9<sup>th</sup></b>
Houston	\$36,793	\$54,820	8 <sup>th</sup>	49%	1 <sup>st</sup>
Denver	\$41,119	\$53,983	9 <sup>th</sup>	31%	13 <sup>th</sup>
Baltimore	\$40,729	\$53,690	10 <sup>th</sup>	32%	11 <sup>th</sup>
Minneapolis-St. Paul	\$41,324	\$53,166	11 <sup>th</sup>	29%	18 <sup>th</sup>
San Diego	\$39,839	\$51,459	12 <sup>th</sup>	29%	19 <sup>th</sup>
Los Angeles	\$37,087	\$50,751	13 <sup>th</sup>	37%	8 <sup>th</sup>
Chicago	\$38,733	\$50,690	14 <sup>th</sup>	31%	14 <sup>th</sup>
Dallas Fort Worth	\$35,840	\$49,506	15 <sup>th</sup>	38%	6 <sup>th</sup>
Pittsburgh	\$35,210	\$49,349	16 <sup>th</sup>	40%	2 <sup>nd</sup>
Miami	\$37,599	\$48,224	17 <sup>th</sup>	28%	20 <sup>th</sup>
<b>United States</b>	<b>\$35,815</b>	<b>\$47,615</b>	<b>---</b>	<b>33%</b>	<b>---</b>
St. Louis	\$36,091	\$47,391	18 <sup>th</sup>	31%	15 <sup>th</sup>
Portland	\$34,895	\$45,794	19 <sup>th</sup>	31%	16 <sup>th</sup>
Detroit	\$35,914	\$44,500	20 <sup>th</sup>	24%	22 <sup>nd</sup>
Atlanta	\$36,248	\$43,472	21 <sup>st</sup>	20%	26 <sup>th</sup>
Charlotte	\$34,256	\$42,425	22 <sup>nd</sup>	24%	23 <sup>rd</sup>
San Antonio	\$29,562	\$41,372	23 <sup>rd</sup>	40%	3 <sup>rd</sup>
Tampa-St. Petersburg	\$33,091	\$41,296	24 <sup>th</sup>	25%	21 <sup>st</sup>
Phoenix	\$32,716	\$39,846	25 <sup>th</sup>	22%	24 <sup>th</sup>
Riverside	\$27,546	\$33,258	26 <sup>th</sup>	21%	25 <sup>th</sup>

Source: U.S. Bureau of Economic Analysis (BEA), Table CA 30: Economic Profile. "United States" refers only to the metropolitan portion of the nation, as defined by BEA.

**FIGURE 31: CHANGE IN PER CAPITA INCOME, 2004–2014**



Source: U.S. Bureau of Economic Analysis, Table CA 30: Economic Profile.

### *Real Estate*

Table 34 provides office vacancy rates and average leasing rates. As of the end of 2015, the office vacancy rate in the Philadelphia market was 10 percent; ranking 10<sup>th</sup> among the metros studied and lower than the national rate of 10.4 percent. The average lease rate of \$22.16 per square foot ranked 12<sup>th</sup>, lower than the national average and lower than the rate in several large competitors, including Chicago; Dallas-Fort Worth; Northern New Jersey; Houston; Los Angeles; Washington, DC; and New York.

Table 35 lists vacancy rates and average lease rates for industrial space, including flex space and warehouse space. Philadelphia’s industrial space vacancy rate of 7.5 percent is the sixth-highest among the largest metros, and is above the national average of 6.4 percent. The Philadelphia region’s average asking rate of \$4.58 is the 4<sup>th</sup> lowest, well below the national asking rate of \$5.76. Not surprisingly, asking rates per square foot are generally highest in metros with the lowest vacancy rates.





**TABLE 34: OFFICE MARKET STATISTICS, 2015**

METROPOLITAN AREA	Vacancy Rate		Lease Rate	
	Percent	Rank	Rate	Rank
San Francisco	7.1%	1 <sup>st</sup>	\$51.49	24 <sup>th</sup>
New York City	7.5%	2 <sup>nd</sup>	\$59.58	25 <sup>th</sup>
Portland	7.8%	3 <sup>rd</sup>	\$22.55	13 <sup>th</sup>
Seattle-Puget Sound	8.1%	4 <sup>th</sup>	\$30.66	20 <sup>th</sup>
Pittsburgh	8.3%	5 <sup>th</sup>	\$20.51	6 <sup>th</sup>
Minneapolis	8.8%	6 <sup>th</sup>	\$18.61	3 <sup>rd</sup>
Boston	8.8%	7 <sup>th</sup>	\$21.27	8 <sup>th</sup>
Charlotte	9.0%	8 <sup>th</sup>	\$21.87	9 <sup>th</sup>
Denver	9.5%	9 <sup>th</sup>	\$24.44	17 <sup>th</sup>
Philadelphia	10.0%	10 <sup>th</sup>	\$22.16	12 <sup>th</sup>
Miami-Dade County	10.1%	11 <sup>th</sup>	\$31.20	21 <sup>st</sup>
Tampa	10.1%	12 <sup>th</sup>	\$19.68	4 <sup>th</sup>
<b>United States</b>	<b>10.4%</b>	<b>---</b>	<b>\$23.38</b>	<b>---</b>
San Antonio	10.5%	13 <sup>th</sup>	\$20.08	5 <sup>th</sup>
Baltimore	10.6%	14 <sup>th</sup>	\$21.93	10 <sup>th</sup>
St. Louis	10.7%	15 <sup>th</sup>	\$18.30	1 <sup>st</sup>
Los Angeles	11.0%	16 <sup>th</sup>	\$31.60	22 <sup>nd</sup>
San Diego	11.3%	17 <sup>th</sup>	\$29.55	19 <sup>th</sup>
Atlanta	12.1%	18 <sup>th</sup>	\$20.70	7 <sup>th</sup>
Chicago	13.0%	19 <sup>th</sup>	\$23.28	14 <sup>th</sup>
Houston	13.6%	20 <sup>th</sup>	\$28.04	18 <sup>th</sup>
Northern New Jersey	14.1%	21 <sup>st</sup>	\$24.32	16 <sup>th</sup>
Dallas-Fort Worth	14.1%	22 <sup>nd</sup>	\$23.39	15 <sup>th</sup>
Washington, DC	14.3%	23 <sup>rd</sup>	\$34.42	23 <sup>rd</sup>
Detroit	14.4%	24 <sup>th</sup>	\$18.60	2 <sup>nd</sup>
Phoenix	16.3%	25 <sup>th</sup>	\$22.10	11 <sup>th</sup>

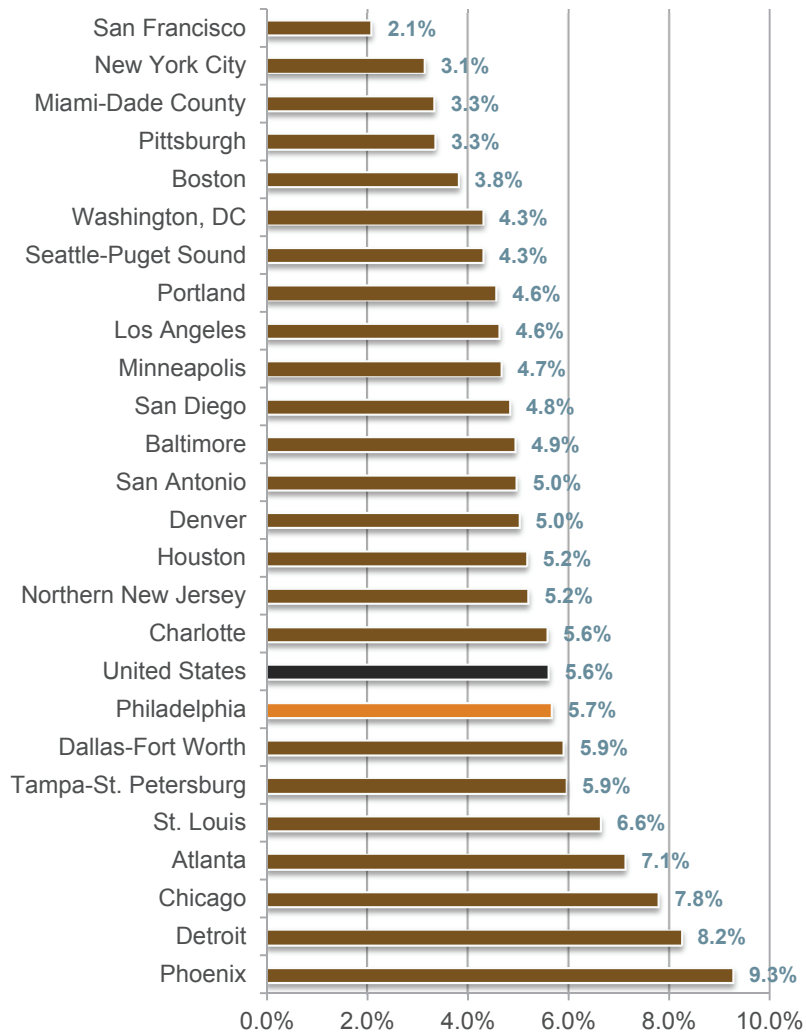
Source: CoStar Group, Inc. Lease rate is the average asking rate per square foot. Comparable data was not available for the Riverside or Trenton-Ewing metro areas; data was not available for the New York metro area but was available separately for New York City and Northern New Jersey.

**TABLE 35: INDUSTRIAL MARKET STATISTICS, 2015**

METROPOLITAN AREA	Vacancy Rate		Lease Rate	
	Percent	Rank	Rate	Rank
Los Angeles	2.4%	1 <sup>st</sup>	\$9.02	21 <sup>st</sup>
San Francisco	3.2%	2 <sup>nd</sup>	\$18.60	25 <sup>th</sup>
Long Island (New York)	3.6%	3 <sup>rd</sup>	\$12.79	24 <sup>th</sup>
Denver	4.4%	4 <sup>th</sup>	\$7.98	19 <sup>th</sup>
Seattle-Puget Sound	4.6%	5 <sup>th</sup>	\$7.43	18 <sup>th</sup>
Miami-Dade County	4.7%	6 <sup>th</sup>	\$9.01	20 <sup>th</sup>
Portland	4.8%	7 <sup>th</sup>	\$7.09	17 <sup>th</sup>
Houston	5.0%	8 <sup>th</sup>	\$6.48	14 <sup>th</sup>
San Diego	5.1%	9 <sup>th</sup>	\$11.61	23 <sup>rd</sup>
Detroit	5.3%	10 <sup>th</sup>	\$5.00	5 <sup>th</sup>
Minneapolis	5.6%	11 <sup>th</sup>	\$6.43	13 <sup>th</sup>
San Antonio	6.2%	12 <sup>th</sup>	\$5.94	11 <sup>th</sup>
<b>United States</b>	<b>6.4%</b>	<b>---</b>	<b>\$5.76</b>	<b>---</b>
St. Louis	6.8%	13 <sup>th</sup>	\$4.18	2 <sup>nd</sup>
Pittsburgh	6.8%	14 <sup>th</sup>	\$5.51	7 <sup>th</sup>
Tampa-St. Petersburg	6.8%	15 <sup>th</sup>	\$5.52	8 <sup>th</sup>
Dallas-Fort Worth	7.0%	16 <sup>th</sup>	\$5.22	6 <sup>th</sup>
Chicago	7.3%	17 <sup>th</sup>	\$5.58	9 <sup>th</sup>
Northern New Jersey	7.3%	18 <sup>th</sup>	\$6.29	12 <sup>th</sup>
Atlanta	7.4%	19 <sup>th</sup>	\$4.24	3 <sup>th</sup>
Philadelphia	7.5%	20 <sup>th</sup>	\$4.58	4 <sup>th</sup>
Charlotte	7.6%	21 <sup>st</sup>	\$3.94	1 <sup>st</sup>
Boston	7.7%	22 <sup>nd</sup>	\$6.52	15 <sup>th</sup>
Washington, DC	9.0%	23 <sup>rd</sup>	\$9.83	22 <sup>nd</sup>
Baltimore	9.8%	24 <sup>th</sup>	\$5.90	10 <sup>th</sup>
Phoenix	10.7%	25 <sup>th</sup>	\$6.74	16 <sup>th</sup>

Source: CoStar Group, Inc. Lease rate is the average asking rate per square foot. Comparable data was not available for the Riverside-San Bernardino, Trenton-Ewing, or New York metro areas, but was available separately for Long Island (New York) and Northern New Jersey.

**FIGURE 32: RETAIL VACANCY RATE, 2015**



Source: CoStar Group, Inc. Data is for year-end 2015. Comparable data was not available for the Riverside-San Bernardino, Trenton-Ewing, or New York metro areas, but was available for New York City and Northern New Jersey.

Figure 32 illustrates retail vacancy rates in each metro. As of the last quarter of 2015, the retail vacancy rate in the Philadelphia metro was 5.7 percent, approximately the same as the national rate but lower than only Dallas, Tampa, St. Louis, Atlanta, Chicago, Detroit, and Phoenix. Retail vacancy rates are significantly lower in many of the Philadelphia region’s Northeast competitors, including New York; Boston; Washington, DC; Baltimore; and Northern New Jersey.

Another indicator of the economic vitality of a region is its residential construction activity. As indicated in Table 36, almost 42,000 permits for residential units were issued in the Philadelphia metropolitan area between 2010 and 2014, ranking 14<sup>th</sup> among the 26 metro areas studied.

In order to better compare the relative impact of construction activity, the building permit data was also compared to each metro’s existing housing stock. The ratio of new units authorized by residential construction permits to the region’s existing housing is 1.7 in the Philadelphia metro, ranking 21<sup>st</sup> among the 26 metros. This number trails the nation’s faster-growing areas such as Houston, Dallas, and Charlotte, but is ahead of Los Angeles, Pittsburgh, New York, Chicago, and Detroit. Of the permits issued between 2010 and 2014 in the Philadelphia metropolitan area, almost 13,000 were in the City of Philadelphia, marking a significant turn-around for a city where only 16,000 permits were issued during the previous decade.

Table 37 provides residential mortgage foreclosure and serious delinquency rates for each of the metros. The foreclosure rate is the percentage of all mortgages in the foreclosure inventory, including both mortgages in foreclosure and bankruptcy foreclosures prior to the auction or trustee sale. As of 2013, the Philadelphia region had the sixth highest mortgage foreclosure rate (ranking 21<sup>st</sup> among the 26 metros) and the fifth highest serious delinquency rate (ranking 22<sup>nd</sup>). Both are higher than the average among the metros studied.

**TABLE 36: HOUSING UNITS AUTHORIZED BY RESIDENTIAL BUILDING PERMITS, 2010–2014**

METROPOLITAN AREA	Units Authorized 2010-2014		Units Issued as a Percentage of the Metro's Housing Stock	
	Units	Rank	Percent	Rank
Houston	180,672	1 <sup>st</sup>	7.4%	1 <sup>st</sup>
Dallas-Fort Worth	137,707	2 <sup>nd</sup>	5.2%	2 <sup>nd</sup>
Charlotte	45,081	10 <sup>th</sup>	4.6%	3 <sup>rd</sup>
Seattle	65,872	6 <sup>th</sup>	4.4%	4 <sup>th</sup>
Denver	45,062	11 <sup>th</sup>	4.0%	5 <sup>th</sup>
Washington, DC	91,488	4 <sup>th</sup>	4.0%	6 <sup>th</sup>
San Antonio	34,048	17 <sup>th</sup>	3.9%	7 <sup>th</sup>
Portland	33,224	19 <sup>th</sup>	3.5%	8 <sup>th</sup>
Phoenix	61,357	7 <sup>th</sup>	3.3%	9 <sup>th</sup>
Tampa-St. Petersburg	42,118	12 <sup>th</sup>	3.1%	10 <sup>th</sup>
Minneapolis-St. Paul	38,620	16 <sup>th</sup>	2.7%	11 <sup>th</sup>
Baltimore	30,887	21 <sup>st</sup>	2.7%	12 <sup>th</sup>
Atlanta	54,601	8 <sup>th</sup>	2.5%	13 <sup>th</sup>
San Diego	25,740	23 <sup>rd</sup>	2.2%	14 <sup>th</sup>
Riverside-San Bernardino	32,604	20 <sup>th</sup>	2.1%	15 <sup>th</sup>
St. Louis	26,266	22 <sup>nd</sup>	2.1%	16 <sup>th</sup>
Boston	39,159	15 <sup>th</sup>	2.1%	17 <sup>th</sup>
Miami	50,466	9 <sup>th</sup>	2.0%	18 <sup>th</sup>
San Francisco	34,039	18 <sup>th</sup>	1.9%	19 <sup>th</sup>
Trenton-Ewing	2,756	26 <sup>th</sup>	1.9%	20 <sup>th</sup>
Philadelphia	41,612	14 <sup>th</sup>	1.7%	21 <sup>st</sup>
Los Angeles	74,567	5 <sup>th</sup>	1.6%	22 <sup>nd</sup>
Pittsburgh	17,591	25 <sup>th</sup>	1.6%	23 <sup>rd</sup>
New York	123,650	3 <sup>rd</sup>	1.6%	24 <sup>th</sup>
Chicago	41,941	13 <sup>th</sup>	1.1%	25 <sup>th</sup>
Detroit	18,786	24 <sup>th</sup>	1.0%	26 <sup>th</sup>

Source: U.S. Census Bureau, Construction Statistics Division.

**TABLE 37: RESIDENTIAL MORTGAGE FORECLOSURE RATES, 2013**

METROPOLITAN AREA	Mortgage Foreclosures		Serious Delinquencies	
	Rate	Rank	Rate	Rank
Minneapolis-St. Paul	1.9%	1 <sup>st</sup>	3.4%	1 <sup>st</sup>
San Francisco	2.3%	2 <sup>nd</sup>	4.0%	2 <sup>nd</sup>
San Diego	2.4%	3 <sup>rd</sup>	4.7%	5 <sup>th</sup>
Houston	2.5%	4 <sup>th</sup>	5.0%	6 <sup>th</sup>
Phoenix	2.5%	5 <sup>th</sup>	4.6%	4 <sup>th</sup>
San Antonio	2.6%	6 <sup>th</sup>	5.2%	8 <sup>th</sup>
Los Angeles	2.6%	7 <sup>th</sup>	5.1%	7 <sup>th</sup>
Denver	2.6%	8 <sup>th</sup>	4.4%	3 <sup>rd</sup>
Washington, DC	2.9%	9 <sup>th</sup>	5.4%	9 <sup>th</sup>
Charlotte	2.9%	10 <sup>th</sup>	5.8%	10 <sup>th</sup>
Boston	3.0%	11 <sup>th</sup>	6.1%	12 <sup>th</sup>
Dallas-Fort Worth	3.1%	12 <sup>th</sup>	6.0%	11 <sup>th</sup>
Riverside-San Bernardino	3.2%	13 <sup>th</sup>	6.7%	16 <sup>th</sup>
Detroit	3.3%	14 <sup>th</sup>	7.0%	18 <sup>th</sup>
St. Louis	3.5%	15 <sup>th</sup>	6.5%	14 <sup>th</sup>
Seattle	3.5%	16 <sup>th</sup>	6.5%	15 <sup>th</sup>
Portland	3.9%	17 <sup>th</sup>	6.1%	13 <sup>th</sup>
Atlanta	3.9%	18 <sup>th</sup>	7.6%	19 <sup>th</sup>
Pittsburgh	4.0%	19 <sup>th</sup>	6.7%	17 <sup>th</sup>
<b>Peer Average</b>	<b>4.3%</b>	<b>---</b>	<b>7.3%</b>	<b>---</b>
Baltimore	5.0%	20 <sup>th</sup>	8.6%	20 <sup>th</sup>
Philadelphia	5.7%	21 <sup>st</sup>	9.3%	22 <sup>nd</sup>
Chicago	6.0%	22 <sup>nd</sup>	9.2%	21 <sup>st</sup>
New York	7.6%	23 <sup>rd</sup>	11.1%	23 <sup>rd</sup>
Trenton-Ewing	8.7%	24 <sup>th</sup>	12.9%	24 <sup>th</sup>
Tampa-St. Petersburg	10.9%	25 <sup>th</sup>	14.8%	25 <sup>th</sup>
Miami	11.6%	26 <sup>th</sup>	15.8%	26 <sup>th</sup>

Source: Local Initiatives Support Corporation (LISC), September 2013. "Serious delinquencies" include mortgages that are 90 or more days past due.

## Gross Domestic Product

As illustrated in Table 38, the gross domestic product (GDP) in the Philadelphia metro was the eighth-highest among the metro areas studied, having increased by over 36 percent between 2004 and 2014. This increase, while significant, is lower than that realized in many of the other metros (as illustrated in Figure 33) and also less than the national increase of 42 percent during the same time period (considering only the metropolitan portion of the nation). In the Trenton-Ewing metro, GDP grew at approximately the same rate as the national GDP during the decade.

To facilitate better comparisons between the metros, Table 39 provides data on GDP per capita in 2004 and 2014. The GDP per capita in the Trenton-Ewing metro was fourth-highest among the metros in 2014 (at \$73,719), while the Philadelphia metro's GDP per capita ranked 13<sup>th</sup>. Growth in GDP per capita in both the Trenton-Ewing metro (11 percent, 7<sup>th</sup> highest among the metros) and Philadelphia metro (5 percent, 13<sup>th</sup> highest) outpaced that of the nation (4 percent), as illustrated in Figure 34.

## Company Headquarters

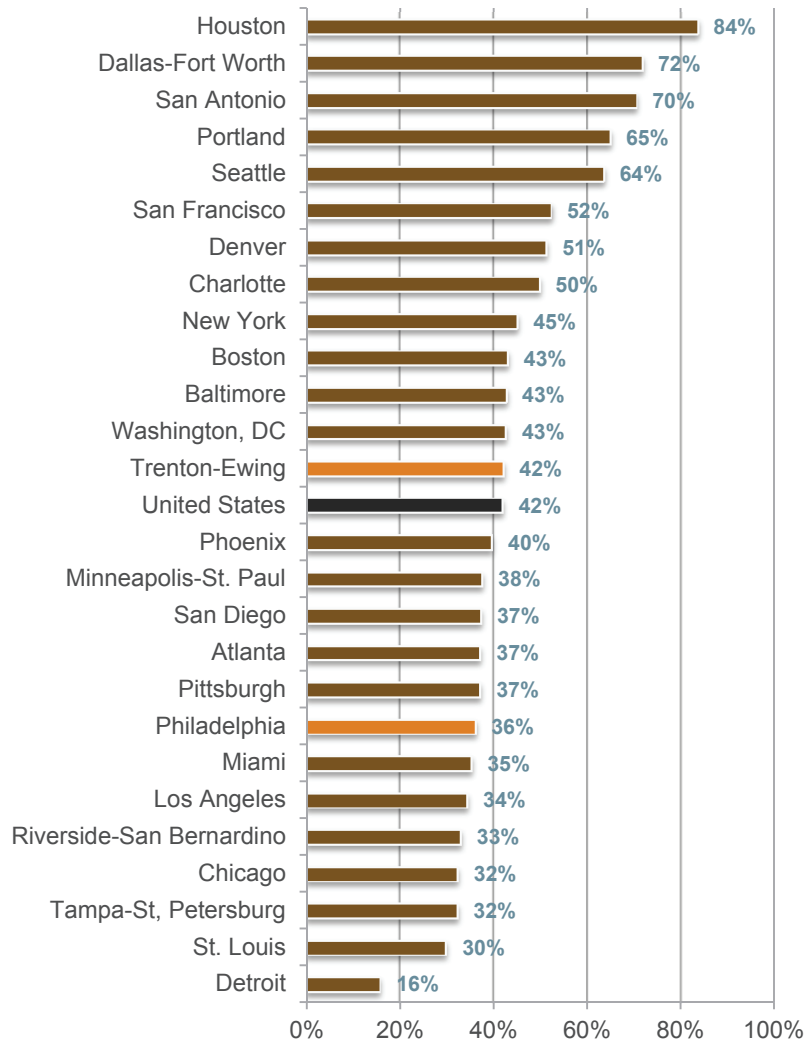
Another indicator of a region's economic health is the number of Fortune 500 headquarters and large companies located there. Table 40 lists the number of large companies from two different reputable sources. The Fortune 500 is a ranking of the nation's top 500 public corporations, based on gross revenues. Nine Fortune 500 companies were headquartered in the Philadelphia region in 2014, ranking fourth among the nation's largest 25 metropolitan areas, behind only New York, Chicago, and Los Angeles, and tied with Boston. Table 40 also identifies how many of the nation's largest private companies are located within each region, based on a Forbes survey conducted in 2014. The Philadelphia metro is home to ten companies identified by Forbes as the nation's largest 221 private employers, based on total revenue.

**TABLE 38: GROSS DOMESTIC PRODUCT (GDP), 2004 AND 2014**

METROPOLITAN AREA	2004	2014		Change	
		GDP	Rank	Percent	Rank
New York	\$1,074,764	\$1,558,518	1 <sup>st</sup>	45%	9 <sup>th</sup>
Los Angeles	\$645,354	\$866,745	2 <sup>nd</sup>	34%	21 <sup>st</sup>
Chicago	\$461,580	\$610,552	3 <sup>rd</sup>	32%	23 <sup>rd</sup>
Houston	\$286,223	\$525,397	4 <sup>th</sup>	84%	1 <sup>st</sup>
Dallas-Fort Worth	\$293,669	\$504,358	5 <sup>th</sup>	72%	2 <sup>nd</sup>
Washington, DC	\$330,646	\$471,584	6 <sup>th</sup>	43%	10 <sup>th</sup>
San Francisco	\$270,592	\$411,969	7 <sup>th</sup>	52%	6 <sup>th</sup>
<b>Philadelphia</b>	<b>\$287,484</b>	<b>\$391,118</b>	<b>8<sup>th</sup></b>	<b>36%</b>	<b>19<sup>th</sup></b>
Boston	\$267,492	\$382,459	9 <sup>th</sup>	43%	11 <sup>th</sup>
Atlanta	\$236,920	\$324,881	10 <sup>th</sup>	37%	16 <sup>th</sup>
Seattle	\$183,981	\$300,827	11 <sup>th</sup>	64%	5 <sup>th</sup>
Miami	\$221,273	\$299,161	12 <sup>th</sup>	35%	20 <sup>th</sup>
Detroit	\$204,408	\$236,500	13 <sup>th</sup>	16%	26 <sup>th</sup>
Minneapolis-St. Paul	\$171,425	\$235,733	14 <sup>th</sup>	38%	15 <sup>th</sup>
Phoenix	\$154,126	\$215,214	15 <sup>th</sup>	40%	14 <sup>th</sup>
San Diego	\$150,710	\$206,817	16 <sup>th</sup>	37%	17 <sup>th</sup>
Denver	\$123,716	\$187,111	17 <sup>th</sup>	51%	7 <sup>th</sup>
Baltimore	\$121,624	\$173,516	18 <sup>th</sup>	43%	12 <sup>th</sup>
Portland	\$96,635	\$159,328	19 <sup>th</sup>	65%	4 <sup>th</sup>
St. Louis	\$115,499	\$149,951	20 <sup>th</sup>	30%	25 <sup>th</sup>
Charlotte	\$95,890	\$143,628	21 <sup>st</sup>	50%	8 <sup>th</sup>
Pittsburgh	\$98,945	\$135,662	22 <sup>nd</sup>	37%	18 <sup>th</sup>
Riverside	\$100,795	\$133,983	23 <sup>rd</sup>	33%	22 <sup>nd</sup>
Tampa-St. Petersburg	\$96,967	\$128,201	24 <sup>th</sup>	32%	24 <sup>th</sup>
San Antonio	\$61,466	\$104,787	25 <sup>th</sup>	70%	3 <sup>rd</sup>
<b>Trenton-Ewing</b>	<b>\$20,984</b>	<b>\$29,809</b>	<b>26<sup>th</sup></b>	<b>42%</b>	<b>13<sup>th</sup></b>

Source: U.S. Bureau of Economic Analysis. Data listed is for all industries. Data is in millions of chained 2009 dollars (defined as dollar figures that were adjusted for inflation using 2009 as the base year).

**FIGURE 33: CHANGE IN GROSS DOMESTIC PRODUCT, 2004-2014**



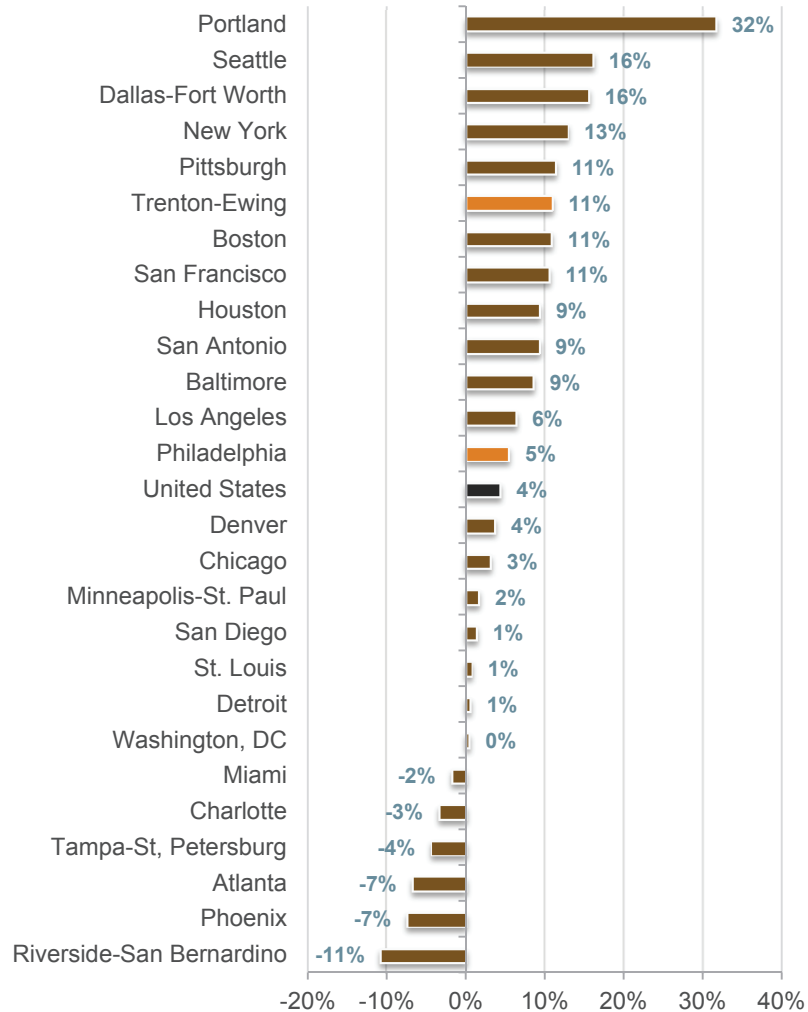
Source: U.S. Bureau of Economic Analysis. Data listed is for all industries; "United States" includes only the metropolitan portion.

**TABLE 39: PER CAPITA GROSS DOMESTIC PRODUCT (GDP), 2004 AND 2014**

METROPOLITAN AREA	2004	2014		Change	
		Per Capita GDP	Rank	Percent	Rank
San Francisco	\$72,939	\$80,643	1 <sup>st</sup>	11%	5 <sup>th</sup>
Seattle	\$65,364	\$75,874	2 <sup>nd</sup>	16%	2 <sup>nd</sup>
Boston	\$67,412	\$74,746	3 <sup>rd</sup>	11%	6 <sup>th</sup>
Trenton-Ewing	\$66,449	\$73,719	4 <sup>th</sup>	11%	7 <sup>th</sup>
Washington, DC	\$71,866	\$72,191	5 <sup>th</sup>	0%	20 <sup>th</sup>
New York	\$62,723	\$70,830	6 <sup>th</sup>	13%	4 <sup>th</sup>
Houston	\$64,081	\$70,097	7 <sup>th</sup>	9%	9 <sup>th</sup>
Dallas-Fort Worth	\$57,261	\$66,168	8 <sup>th</sup>	16%	3 <sup>rd</sup>
Portland	\$49,378	\$64,991	9 <sup>th</sup>	32%	1 <sup>st</sup>
Minneapolis-St. Paul	\$61,028	\$62,054	10 <sup>th</sup>	2%	16 <sup>th</sup>
Denver	\$59,688	\$61,903	11 <sup>th</sup>	4%	14 <sup>th</sup>
Los Angeles	\$56,557	\$60,148	12 <sup>th</sup>	6%	12 <sup>th</sup>
Philadelphia	\$56,165	\$59,240	13 <sup>th</sup>	5%	13 <sup>th</sup>
San Diego	\$57,753	\$58,540	14 <sup>th</sup>	1%	17 <sup>th</sup>
Chicago	\$56,592	\$58,375	15 <sup>th</sup>	3%	15 <sup>th</sup>
Baltimore	\$52,770	\$57,291	16 <sup>th</sup>	9%	10 <sup>th</sup>
Charlotte	\$57,049	\$55,114	17 <sup>th</sup>	-3%	22 <sup>nd</sup>
Atlanta	\$56,930	\$53,104	18 <sup>th</sup>	-7%	24 <sup>th</sup>
<b>United States</b>	<b>\$50,316</b>	<b>\$52,526</b>	<b>---</b>	<b>4%</b>	<b>---</b>
Pittsburgh	\$47,553	\$52,961	19 <sup>th</sup>	11%	8 <sup>th</sup>
Detroit	\$50,865	\$51,171	20 <sup>th</sup>	1%	18 <sup>th</sup>
St. Louis	\$48,516	\$48,885	21 <sup>st</sup>	1%	19 <sup>th</sup>
Miami	\$46,945	\$46,104	22 <sup>nd</sup>	-2%	21 <sup>st</sup>
Phoenix	\$47,616	\$44,102	23 <sup>rd</sup>	-7%	25 <sup>th</sup>
San Antonio	\$37,609	\$41,109	24 <sup>th</sup>	9%	11 <sup>th</sup>
Tampa-St. Petersburg	\$42,315	\$40,468	25 <sup>th</sup>	-4%	23 <sup>rd</sup>
Riverside	\$30,947	\$27,620	26 <sup>th</sup>	-11%	26 <sup>th</sup>

Source: U.S. Bureau of Economic Analysis. Data listed is for all industries. Per capita GDP is based on the U.S. Census Bureau's mid-year population estimates for each year. GDP is shown in chained 2009 dollars (defined as dollars that were adjusted for inflation using 2009 as the base year).

**FIGURE 34: CHANGE IN PER CAPITA GROSS DOMESTIC PRODUCT, 2004-2014**



Source: U.S. Bureau of Economic Analysis. Data listed is for all industries. Per capita GDP is based on the U.S. Census Bureau's mid-year population estimates for each year. GDP is shown in chained 2009 dollars, defined as inflation-adjusted dollars calculated with 2009 as the base year.

**TABLE 40: FORTUNE 500 HEADQUARTERS AND LARGE COMPANIES, 2014**

METROPOLITAN AREA	FORTUNE 500 HEADQUARTERS	FORBES' LARGEST PRIVATE COMPANIES
New York	27	70
Chicago	14	29
Los Angeles	12	19
Philadelphia	9	10
Boston	9	10
Dallas-Fort Worth	7	17
St. Louis	7	10
Houston	6	25
Minneapolis-St. Paul	5	18
Atlanta	5	14
Denver	5	10
San Francisco	4	17
Detroit	3	12
Pittsburgh	3	8
Phoenix	3	6
Miami	3	5
Washington, DC	2	18
Charlotte	2	7
Baltimore	2	0
San Antonio	1	5
San Diego	1	2
Riverside-San Bernardino	1	0
Seattle	0	8
Tampa-St. Petersburg	0	3
Portland	0	2

Sources: Fortune magazine; "America's Largest Private Companies, 2014", Forbes (<http://onforb.es/TjFYuK>), December 2014. Fortune 500 and Forbes ranking are based on revenue.

## Exports

Table 41 describes the value of exports for each of the metro areas. Almost \$25 billion in goods were exported from the Philadelphia metro area in 2013, ranking 10<sup>th</sup> among the nation's 25 largest metros. When considering the value of exports per capita, however, the Philadelphia region drops to 17<sup>th</sup>. This export data includes manufactured products and agricultural commodities.

## Innovation

Much of today's successful economic growth hinges on attracting or cultivating jobs that characterize the "innovation economy"—firms and occupations relying on talented workers whose skills are based on significant knowledge, insight, and creativity. The U.S. Economic Development Administration (EDA) has worked with others to develop tools to support strategic economic development planning, including tools to quantify and assess a region's capacity for innovation. The goal of this work is to help planners assess their region's comparative strengths and weaknesses with respect to fostering innovation-based growth. EDA's Innovation Index, which compares regional performance to the United States, is calculated from four component indexes:

- human capital, which considers the average high-tech employment share, technology-based occupations, the growth rate of young adult population, and educational attainment;
- economic dynamics, including establishment sizes, venture capital investment, broadband density and connections, and average establishment churn;
- productivity and employment, which considers GDP, the region's ratio of jobs-to-population growth, patents per 1,000 workers, and the change in the region's share of high-tech employment; and
- economic well-being, which considers income, wages, poverty, unemployment, and migration.

TABLE 41: EXPORTS, 2013

METROPOLITAN AREA	Exports (\$ billions)		Exports per Capita	
	Value	Rank	Value	Rank
Houston	\$115.00	1 <sup>st</sup>	\$18,216	1 <sup>st</sup>
Seattle	\$56.70	4 <sup>th</sup>	\$15,706	2 <sup>nd</sup>
Detroit	\$53.90	5 <sup>th</sup>	\$12,550	3 <sup>rd</sup>
San Antonio	\$19.30	13 <sup>th</sup>	\$8,474	4 <sup>th</sup>
Portland	\$17.60	16 <sup>th</sup>	\$7,602	5 <sup>th</sup>
Miami	\$41.80	7 <sup>th</sup>	\$7,172	6 <sup>th</sup>
Minneapolis-St. Paul	\$23.70	11 <sup>th</sup>	\$6,851	7 <sup>th</sup>
Los Angeles	\$76.30	3 <sup>rd</sup>	\$5,810	8 <sup>th</sup>
San Francisco	\$25.30	9 <sup>th</sup>	\$5,602	9 <sup>th</sup>
San Diego	\$17.90	15 <sup>th</sup>	\$5,574	10 <sup>th</sup>
New York	\$106.90	2 <sup>nd</sup>	\$5,359	11 <sup>th</sup>
Boston	\$22.20	12 <sup>th</sup>	\$4,739	12 <sup>th</sup>
Chicago	\$44.90	6 <sup>th</sup>	\$4,708	13 <sup>th</sup>
Charlotte	\$10.70	20 <sup>th</sup>	\$4,582	14 <sup>th</sup>
St. Louis	\$12.40	18 <sup>th</sup>	\$4,429	15 <sup>th</sup>
Pittsburgh	\$10.40	21 <sup>st</sup>	\$4,405	16 <sup>th</sup>
<b>Philadelphia</b>	<b>\$24.90</b>	<b>10<sup>th</sup></b>	<b>\$4,126</b>	<b>17<sup>th</sup></b>
Dallas-Fort Worth	\$27.60	8 <sup>th</sup>	\$4,051	18 <sup>th</sup>
Atlanta	\$18.80	14 <sup>th</sup>	\$3,403	19 <sup>th</sup>
Washington, DC	\$16.20	17 <sup>th</sup>	\$2,723	20 <sup>th</sup>
Phoenix	\$11.50	19 <sup>th</sup>	\$2,614	21 <sup>st</sup>
Tampa-St. Petersburg	\$6.70	23 <sup>rd</sup>	\$2,334	22 <sup>nd</sup>
Riverside-San Bernardino	\$9.60	22 <sup>nd</sup>	\$2,191	23 <sup>rd</sup>
Baltimore	\$5.90	24 <sup>th</sup>	\$2,129	24 <sup>th</sup>
Denver	\$3.60	25 <sup>th</sup>	\$1,335	25 <sup>th</sup>

Source: U.S. Department of Commerce, Office of Industry and Trade Information. Total exports are shown in millions of dollars; exports include both manufactured products and agricultural commodities.

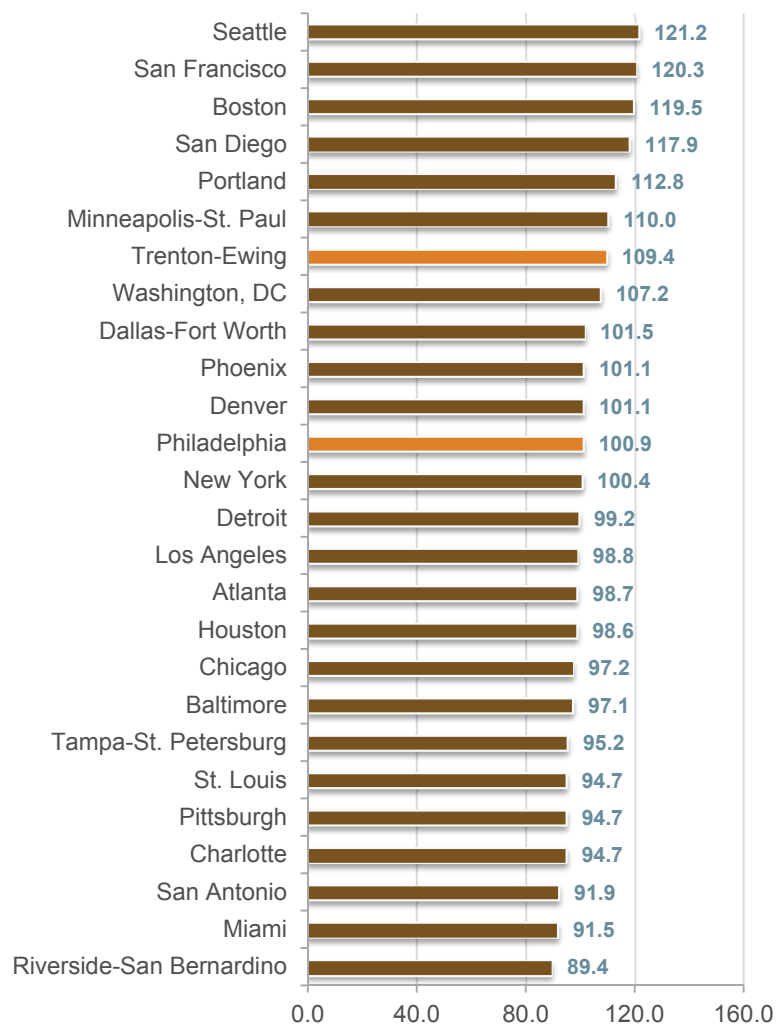
Figure 35 illustrates the innovation index for each of the 26 metros, and Table 42 provides details on the individual index components. The Philadelphia metro area's overall index of 100.9 ranks 12<sup>th</sup> and the Trenton-Ewing metro's index of 109.4 ranks 7<sup>th</sup>. According to EDA's methodology, the Philadelphia metro ranks well in economic dynamics, but scores relatively poorly in human capital.

Table 43 provides data on academic research and development (R&D) expenditures at the region's major academic institutions in 2011. R&D expenditures within the Philadelphia metro area ranked 10th nationally. This total does not include, however, expenditures at other major institutions in close proximity to the Philadelphia metro (including the University of Delaware and the main campus of Rutgers University), where some spending may occur within the Philadelphia metro.

Table 44 compares venture capital invested in the Philadelphia metro area with that of the other metros studied. In 2015, the region ranked 11<sup>th</sup> in terms of the amount of venture capital invested, with over \$516 million invested in 93 different start-up companies.



**FIGURE 35: OVERALL INNOVATION INDEX, 2010**



Source: U.S. Economic Development Administration; data accessed through StatsAmerica. The index compares each region's capacity for innovation to the United States as a whole, where the United States index equals 100.



**TABLE 42: INNOVATION INDEX, 2010**

METROPOLITAN AREA	Overall Index		Human Capital		Economic Dynamics		Productivity		Economic Well-Being	
	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank
Seattle	121.2	1 <sup>st</sup>	130.9	2 <sup>nd</sup>	104.6	4 <sup>th</sup>	133.9	1 <sup>st</sup>	103.7	7 <sup>th</sup>
San Francisco	120.3	2 <sup>nd</sup>	127.1	3 <sup>rd</sup>	105.8	3 <sup>rd</sup>	133.7	2 <sup>nd</sup>	103.7	8 <sup>th</sup>
Boston	119.5	3 <sup>rd</sup>	124.8	4 <sup>th</sup>	109.3	1 <sup>st</sup>	129.4	6 <sup>th</sup>	104.3	5 <sup>th</sup>
San Diego	117.9	4 <sup>th</sup>	122.5	5 <sup>th</sup>	105.9	2 <sup>nd</sup>	129.9	5 <sup>th</sup>	104.2	6 <sup>th</sup>
Portland	112.8	5 <sup>th</sup>	121.9	6 <sup>th</sup>	89.4	20 <sup>th</sup>	132.2	3 <sup>rd</sup>	97.7	20 <sup>th</sup>
Minneapolis-St. Paul	110.0	6 <sup>th</sup>	116.8	8 <sup>th</sup>	90.5	12 <sup>th</sup>	126.2	7 <sup>th</sup>	100.5	17 <sup>th</sup>
<b>Trenton-Ewing</b>	<b>109.4</b>	<b>7<sup>th</sup></b>	<b>109.9</b>	<b>12<sup>th</sup></b>	<b>90.4</b>	<b>13<sup>th</sup></b>	<b>130.6</b>	<b>4<sup>th</sup></b>	<b>101.0</b>	<b>15<sup>th</sup></b>
Washington, DC	107.2	8 <sup>th</sup>	135.7	1 <sup>st</sup>	88.2	24 <sup>th</sup>	97.9	17 <sup>th</sup>	106.7	2 <sup>nd</sup>
Dallas-Fort Worth	101.5	9 <sup>th</sup>	115.6	9 <sup>th</sup>	90.3	15 <sup>th</sup>	98.9	14 <sup>th</sup>	100.9	16 <sup>th</sup>
Phoenix	101.1	10 <sup>th</sup>	110.7	11 <sup>th</sup>	91.9	7 <sup>th</sup>	100.6	13 <sup>th</sup>	101.3	13 <sup>th</sup>
Denver	101.1	11 <sup>th</sup>	120.9	7 <sup>th</sup>	89.3	22 <sup>nd</sup>	92.6	21 <sup>st</sup>	102.8	10 <sup>th</sup>
<b>Philadelphia</b>	<b>100.9</b>	<b>12<sup>th</sup></b>	<b>104.5</b>	<b>14<sup>th</sup></b>	<b>93.0</b>	<b>6<sup>th</sup></b>	<b>103.8</b>	<b>11<sup>th</sup></b>	<b>102.2</b>	<b>11<sup>th</sup></b>
New York	100.4	13 <sup>th</sup>	102.6	19 <sup>th</sup>	95.5	5 <sup>th</sup>	104.2	9 <sup>th</sup>	97.5	21 <sup>st</sup>
Detroit	99.2	14 <sup>th</sup>	96.0	23 <sup>rd</sup>	89.7	18 <sup>th</sup>	115.3	8 <sup>th</sup>	89.0	26 <sup>th</sup>
Los Angeles	98.8	15 <sup>th</sup>	103.4	16 <sup>th</sup>	89.5	19 <sup>th</sup>	103.9	10 <sup>th</sup>	97.1	22 <sup>nd</sup>
Atlanta	98.7	16 <sup>th</sup>	112.2	10 <sup>th</sup>	90.9	10 <sup>th</sup>	94.2	19 <sup>th</sup>	95.1	24 <sup>th</sup>
Houston	98.6	17 <sup>th</sup>	100.9	20 <sup>th</sup>	88.8	23 <sup>rd</sup>	103.7	12 <sup>th</sup>	105.4	4 <sup>th</sup>
Chicago	97.2	18 <sup>th</sup>	102.9	17 <sup>th</sup>	90.8	11 <sup>th</sup>	98.6	15 <sup>th</sup>	94.6	25 <sup>th</sup>
Baltimore	97.1	19 <sup>th</sup>	104.0	15 <sup>th</sup>	85.9	26 <sup>th</sup>	98.2	16 <sup>th</sup>	107.0	1 <sup>st</sup>
Tampa-St. Petersburg	95.2	20 <sup>th</sup>	106.2	13 <sup>th</sup>	91.6	9 <sup>th</sup>	85.8	25 <sup>th</sup>	101.2	14 <sup>th</sup>
St. Louis	94.7	21 <sup>st</sup>	99.8	22 <sup>nd</sup>	89.4	21 <sup>st</sup>	93.7	20 <sup>th</sup>	97.8	19 <sup>th</sup>
Pittsburgh	94.7	22 <sup>nd</sup>	93.9	25 <sup>th</sup>	90.1	16 <sup>th</sup>	97.3	18 <sup>th</sup>	103.2	9 <sup>th</sup>
Charlotte	94.7	23 <sup>rd</sup>	102.9	18 <sup>th</sup>	91.9	8 <sup>th</sup>	86.9	22 <sup>nd</sup>	101.6	12 <sup>th</sup>
San Antonio	91.9	24 <sup>th</sup>	100.1	21 <sup>st</sup>	87.5	25 <sup>th</sup>	83.6	26 <sup>th</sup>	105.6	3 <sup>rd</sup>
Miami	91.5	25 <sup>th</sup>	96.0	24 <sup>th</sup>	90.4	14 <sup>th</sup>	86.5	23 <sup>rd</sup>	96.4	23 <sup>rd</sup>
Riverside-San Bernardino	89.4	26 <sup>th</sup>	89.1	26 <sup>th</sup>	90.1	17 <sup>th</sup>	85.9	24 <sup>th</sup>	98.4	18 <sup>th</sup>

Source: U.S. Economic Development Administration; data accessed through StatsAmerica. The index compares each region's capacity for innovation to the United States as a whole, where the United States index equals 100. In this table, the metros are listed in order of their overall index.

**TABLE 43: ACADEMIC RESEARCH AND DEVELOPMENT EXPENDITURES, 2011**

METROPOLITAN AREA	EXPENDITURES (MILLIONS)	NATIONAL RANK
New York	\$3,762.7	1 <sup>st</sup>
Los Angeles	\$2,466.8	2 <sup>nd</sup>
Baltimore	\$2,272.0	3 <sup>rd</sup>
Boston	\$2,239.6	4 <sup>th</sup>
Houston	\$1,832.7	5 <sup>th</sup>
San Francisco	\$1,800.8	6 <sup>th</sup>
Chicago	\$1,690.5	7 <sup>th</sup>
Washington, DC	\$1,666.7	8 <sup>th</sup>
San Diego	\$1,530.6	9 <sup>th</sup>
Philadelphia	\$1,467.2	10 <sup>th</sup>
Atlanta	\$1,354.5	11 <sup>th</sup>
Pittsburgh	\$1,161.4	12 <sup>th</sup>
Seattle	\$1,158.8	13 <sup>th</sup>
Minneapolis-St. Paul	\$857.5	14 <sup>th</sup>
St. Louis	\$832.2	15 <sup>th</sup>
Dallas-Fort Worth	\$721.4	17 <sup>th</sup>
Miami	\$509.2	18 <sup>th</sup>
Denver	\$483.5	20 <sup>th</sup>
Portland	\$402.1	22 <sup>nd</sup>
Tampa-St. Petersburg	\$399.3	23 <sup>rd</sup>
Phoenix	\$355.2	24 <sup>th</sup>
Detroit	\$288.1	25 <sup>th</sup>
San Antonio	\$259.9	26 <sup>th</sup>
Riverside-San Bernardino	\$185.4	27 <sup>th</sup>
Charlotte	\$34.6	29 <sup>th</sup>

Source: National Science Foundation. For this table, the Philadelphia region includes Mercer County, New Jersey

**TABLE 44: VENTURE CAPITAL INVESTMENTS, 2015 VERSUS 2010**

METROPOLITAN AREA	INVESTMENT (MILLIONS) 2010	INVESTMENT (MILLIONS) 2015	PERCENTAGE CHANGE 2010-2015	RANK
San Francisco	\$5,837	\$21,043	261%	5 <sup>th</sup>
New York	\$1,765	\$6,981	296%	4 <sup>th</sup>
Boston	\$2,374	\$5,582	135%	11 <sup>th</sup>
Los Angeles	\$1,415	\$4,482	217%	6 <sup>th</sup>
Seattle	\$594	\$1,172	97%	13 <sup>th</sup>
San Diego	\$848	\$1,167	38%	16 <sup>th</sup>
Chicago	\$669	\$1,104	65%	15 <sup>th</sup>
Washington, DC	\$747	\$924	24%	19 <sup>th</sup>
Atlanta	\$346	\$836	142%	10 <sup>th</sup>
Denver	\$189	\$540	186%	7 <sup>th</sup>
Philadelphia	\$376	\$516	37%	17 <sup>th</sup>
Baltimore	\$200	\$445	123%	12 <sup>th</sup>
Minneapolis-St. Paul	\$149	\$369	148%	9 <sup>th</sup>
Miami	\$118	\$301	154%	8 <sup>th</sup>
Charlotte	\$33	\$256	668%	1 <sup>st</sup>
St. Louis	\$37	\$254	586%	2 <sup>nd</sup>
Dallas-Fort Worth	\$319	\$212	-34%	24 <sup>th</sup>
Pittsburgh	\$164	\$199	21%	20 <sup>th</sup>
Portland	\$97	\$161	67%	14 <sup>th</sup>
Houston	\$284	\$161	-43%	25 <sup>th</sup>
Phoenix	\$91	\$96	5%	22 <sup>nd</sup>
Detroit	\$68	\$78	14%	21 <sup>st</sup>
Riverside-San Bernardino	\$9	\$60	586%	3 <sup>rd</sup>
San Antonio	\$76	\$53	-30%	23 <sup>rd</sup>
Tampa-St. Petersburg	\$29	\$37	28%	18 <sup>th</sup>
Trenton-Ewing	\$69	\$34	-51%	26 <sup>th</sup>

Source: Price Waterhouse-Coopers/National Venture Capital Association, Money Tree Report, 2016.

When considering the percentage change in venture capital invested in 2015 as compared to 2010, the Philadelphia metro ranks 17<sup>th</sup>, despite an increase of 37 percent. Several metros that have historically attracted more venture capital than the Philadelphia region have also realized higher growth rates, including San Francisco, New York, Boston, Los Angeles, and Atlanta. Other metros, including Charlotte, St. Louis, and Riverside-San Bernardino, have historically attracted less capital investment but since 2010 have seen significant growth.

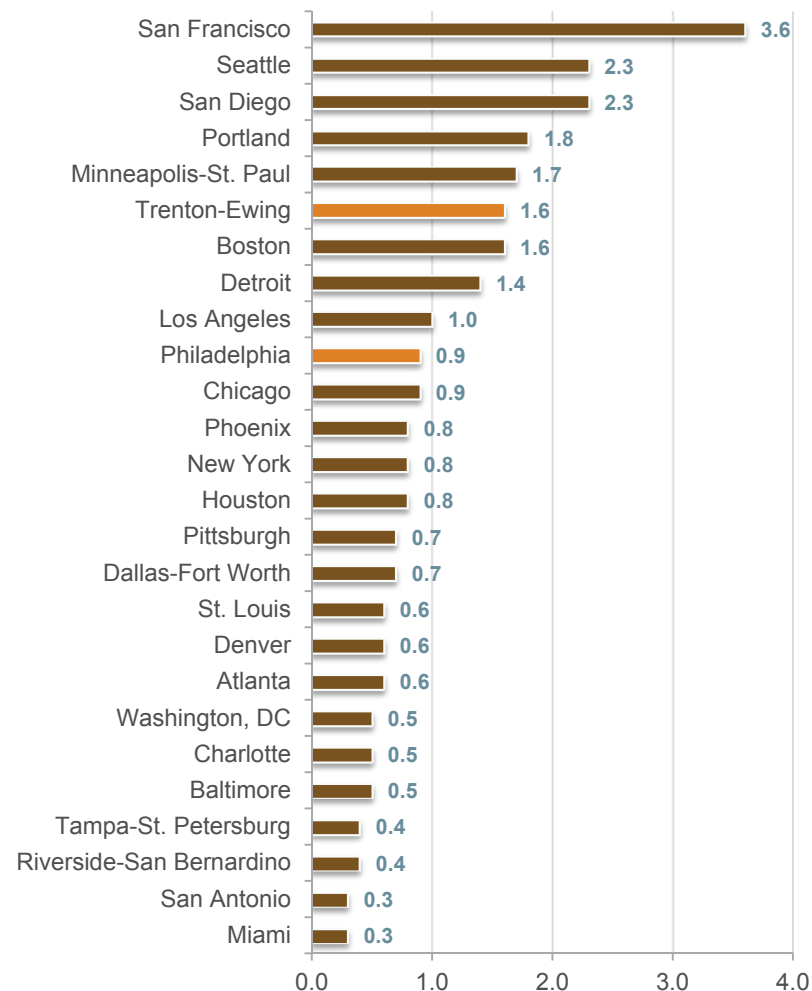
Another indicator of a region’s capacity to compete economically is its ability to take advantage of its R&D capabilities and commercialize new products and technologies, as measured by the number of patents issued. Figure 36 illustrates the average annual number of patents that were issued for every 1,000 workers, based on data for the years between 2007 and 2011. During that time period, the Trenton-Ewing metro ranked sixth and the Philadelphia metro ranked 10<sup>th</sup> in patents issued per worker, trailing places like San Francisco, Seattle, and San Diego but ahead of several other large metros, including New York, Houston, Dallas, Atlanta, and Washington, DC.

### **Internet Access and Literacy**

An educated and well-connected workforce is critical for maintaining and enhancing regional economic vitality. Table 45 provides data on the percentages of households in each region that have a computer, and that have Internet access at home. The Philadelphia and Trenton metro areas ranked 20<sup>th</sup> and 18<sup>th</sup>, respectively, in the percentage of homes with a computer, while Philadelphia ranks 20<sup>th</sup> and Trenton-Ewing ranks 21<sup>st</sup> in the percentage of homes with internet access.

Similarly, the Philadelphia metro ranked 34<sup>th</sup> in overall literacy in 2013 (18<sup>th</sup> among the 25 largest metros), as illustrated in Table 46. This ranking was based on analysis of six separate indicators: newspaper circulation, number of bookstores, library resources, periodical publishing resources, educational attainment, and Internet access.

**FIGURE 36: AVERAGE ANNUAL PATENTS ISSUED PER 1,000 WORKERS, 2007–2011**



Source: Brookings Institution, Metropolitan Policy Program, accessible at [www.brookings.edu/research/interactives/2013/metropatenting](http://www.brookings.edu/research/interactives/2013/metropatenting), Data represents an annual average calculated for 2007–2011.

**TABLE 45: HOUSEHOLDS WITH ACCESS TO THE INTERNET**

METROPOLITAN AREA	Households with a Computer		Households with Internet Access	
	Percent	Rank	Percent	Rank
Washington, DC	92%	1 <sup>st</sup>	88%	1 <sup>st</sup>
Seattle	92%	2 <sup>nd</sup>	88%	2 <sup>nd</sup>
Portland	92%	3 <sup>rd</sup>	88%	3 <sup>rd</sup>
Denver	92%	4 <sup>th</sup>	87%	6 <sup>th</sup>
San Diego	91%	5 <sup>th</sup>	88%	4 <sup>th</sup>
San Francisco	91%	6 <sup>th</sup>	88%	5 <sup>th</sup>
Minneapolis-St. Paul	90%	7 <sup>th</sup>	87%	7 <sup>th</sup>
Atlanta	90%	8 <sup>th</sup>	84%	9 <sup>th</sup>
Dallas-Fort Worth	89%	9 <sup>th</sup>	82%	13 <sup>th</sup>
Boston	89%	10 <sup>th</sup>	86%	8 <sup>th</sup>
Los Angeles	88%	11 <sup>th</sup>	83%	11 <sup>th</sup>
Baltimore	88%	12 <sup>th</sup>	84%	10 <sup>th</sup>
Charlotte	88%	13 <sup>th</sup>	83%	12 <sup>th</sup>
Riverside-San Bernardino	88%	14 <sup>th</sup>	82%	14 <sup>th</sup>
Houston	87%	15 <sup>th</sup>	81%	19 <sup>th</sup>
Phoenix	87%	16 <sup>th</sup>	82%	15 <sup>th</sup>
Chicago	86%	17 <sup>th</sup>	82%	16 <sup>th</sup>
Trenton-Ewing	87%	18 <sup>th</sup>	80%	21 <sup>st</sup>
New York	86%	19 <sup>th</sup>	82%	17 <sup>th</sup>
Philadelphia	86%	20 <sup>th</sup>	81%	20 <sup>th</sup>
Miami	86%	21 <sup>st</sup>	80%	22 <sup>nd</sup>
Tampa-St. Petersburg	86%	22 <sup>nd</sup>	82%	18 <sup>th</sup>
Detroit	85%	23 <sup>rd</sup>	80%	23 <sup>rd</sup>
San Antonio	85%	24 <sup>th</sup>	79%	25 <sup>th</sup>
<b>United States</b>	<b>85%</b>	<b>---</b>	<b>75%</b>	<b>---</b>
St. Louis	84%	25 <sup>th</sup>	80%	24 <sup>th</sup>
Pittsburgh	82%	26 <sup>th</sup>	79%	26 <sup>th</sup>

Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates.

**TABLE 46: MOST LITERATE CITIES, 2013**

PRIMARY CITY	NATIONAL RANK
Washington, DC	1 <sup>st</sup>
Seattle	2 <sup>nd</sup>
Minneapolis	3 <sup>rd</sup>
Atlanta	4 <sup>th</sup>
Pittsburgh	5 <sup>th</sup>
Denver	6 <sup>th</sup>
Boston	8 <sup>th</sup>
St. Louis	9 <sup>th</sup>
San Francisco	10 <sup>th</sup>
Portland	11 <sup>th</sup>
Baltimore	15 <sup>th</sup>
New York	16 <sup>th</sup>
Charlotte	24 <sup>th</sup>
Tampa	25 <sup>th</sup>
Chicago	29 <sup>th</sup>
Miami	31 <sup>st</sup>
San Diego	32 <sup>nd</sup>
Philadelphia	34 <sup>th</sup>
Dallas	37 <sup>th</sup>
Detroit	41 <sup>st</sup>
Houston	57 <sup>th</sup>
Phoenix	59 <sup>th</sup>
Riverside	61 <sup>st</sup>
Los Angeles	64 <sup>th</sup>
San Antonio	73 <sup>rd</sup>

Source(s): "America's Most Literate Cities, 2013," Central Connecticut State University (<http://bit.ly/1k5Y6d8>,). Rankings were based on six key indicators: newspaper circulation, number of bookstores, library resources, periodical publishing resources, educational attainment, and Internet resources.



# TRANSPORTATION

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## TRANSPORTATION

### Commuting

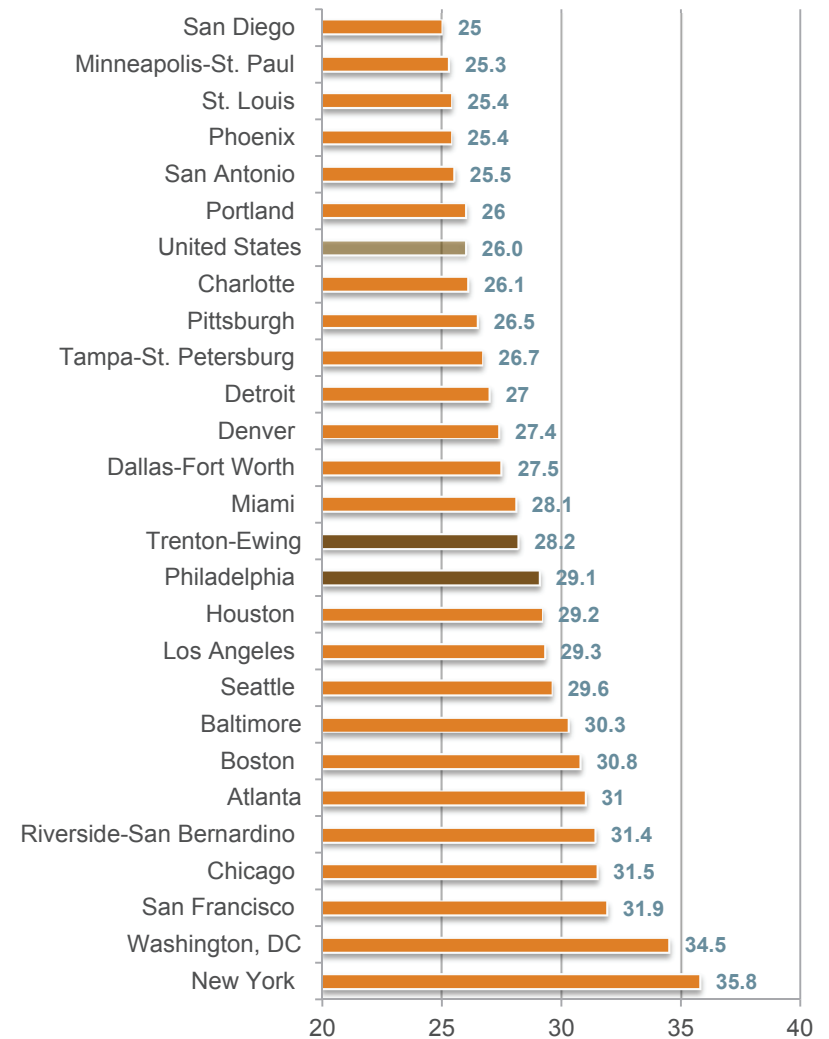
Figure 37 illustrates the average time (in minutes) that commuters in each region take to travel to work, regardless of how they get to work. At just over 29 minutes, the Delaware Valley ranks 15<sup>th</sup> in terms of average commute time, longer than many metros and the nation as a whole but still lower than large major metros such as New York; Washington, DC; Chicago; Atlanta; and Los Angeles.

Travel mode, described in Table 47, indicates how people are getting to work. In 2014, 73 percent of the Philadelphia region's commuters drove alone to work; 8 percent carpooled; 10 percent took public transportation; 4 percent walked to work; 2 percent traveled to work by some other means (including biking); and 4 percent worked at home.

The Philadelphia metro has the 9<sup>th</sup> lowest percentage of commuters who drove alone to work, and Trenton-Ewing ranks 8<sup>th</sup>, behind other metros with major transit systems, including New York; San Francisco; Washington, DC; Boston; Seattle; Portland; and Chicago. As illustrated in Figure 38, the percentage of commuters who drove alone declined in nine of the 26 metros, including Philadelphia. Other modes, including public transit, walking, and biking, simultaneously increased.

The Philadelphia metro also boasts the 4<sup>th</sup> highest percentage of commuters who walk to work (behind only New York, San Francisco, and Boston). The Trenton-Ewing metro has the 2<sup>nd</sup> highest percentage of workers who carpool, while the larger Philadelphia metro ranks 20<sup>th</sup>. Four percent of the workers in the Philadelphia metro worked at home in 2014 (lower than the national average of five percent), while six percent of Trenton-Ewing's workers worked at home.

FIGURE 37: AVERAGE COMMUTE TIME TO WORK, 2014



Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates.

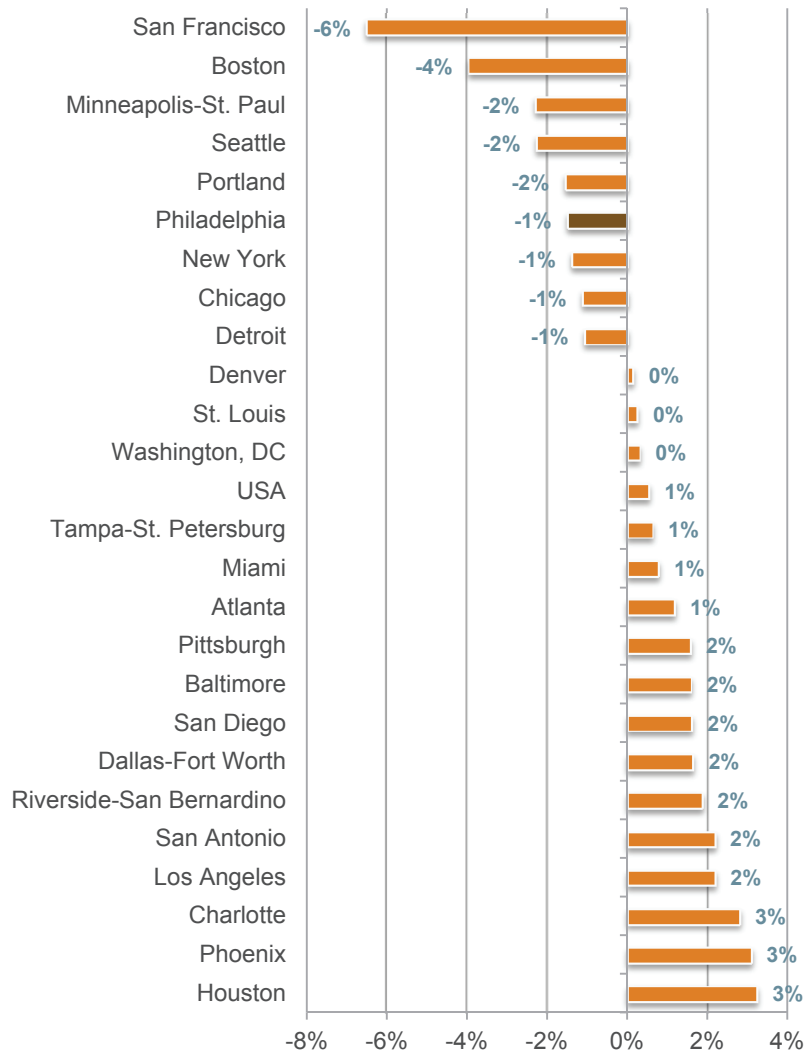
**TABLE 47: MODE OF TRANSPORTATION TO WORK, 2014**

METROPOLITAN AREA	DROVE ALONE		CARPOOLED		PUBLIC TRANSPORTATION		WALKED		OTHER MEANS (INCLUDING BIKING)	WORKED AT HOME
	Percent	Rank	Percent	Rank	Percent	Rank	Percent	Rank		
New York	50%	1 <sup>st</sup>	6%	26 <sup>th</sup>	31%	1 <sup>st</sup>	6%	1 <sup>st</sup>	2%	4%
San Francisco	59%	2 <sup>nd</sup>	9%	12 <sup>th</sup>	17%	2 <sup>nd</sup>	5%	2 <sup>nd</sup>	4%	6%
Washington, DC	66%	3 <sup>rd</sup>	10%	6 <sup>th</sup>	14%	3 <sup>rd</sup>	3%	6 <sup>th</sup>	2%	5%
Boston	68%	4 <sup>th</sup>	7%	23 <sup>rd</sup>	13%	4 <sup>th</sup>	5%	3 <sup>rd</sup>	2%	5%
Seattle	69%	5 <sup>th</sup>	10%	7 <sup>th</sup>	10%	6 <sup>th</sup>	4%	5 <sup>th</sup>	2%	6%
Portland	70%	6 <sup>th</sup>	10%	8 <sup>th</sup>	7%	9 <sup>th</sup>	3%	9 <sup>th</sup>	4%	6%
Chicago	71%	7 <sup>th</sup>	8%	19 <sup>th</sup>	12%	5 <sup>th</sup>	3%	7 <sup>th</sup>	2%	5%
<b>Trenton-Ewing</b>	<b>71%</b>	<b>8<sup>th</sup></b>	<b>11%</b>	<b>2<sup>nd</sup></b>	<b>8%</b>	<b>8<sup>th</sup></b>	<b>3%</b>	<b>8<sup>th</sup></b>	<b>1%</b>	<b>6%</b>
<b>Philadelphia</b>	<b>73%</b>	<b>9<sup>th</sup></b>	<b>8%</b>	<b>20<sup>th</sup></b>	<b>10%</b>	<b>7<sup>th</sup></b>	<b>4%</b>	<b>4<sup>th</sup></b>	<b>2%</b>	<b>4%</b>
Los Angeles	75%	10 <sup>th</sup>	10%	9 <sup>th</sup>	6%	11 <sup>th</sup>	3%	11 <sup>th</sup>	2%	5%
San Diego	76%	11 <sup>th</sup>	9%	12 <sup>th</sup>	3%	17 <sup>th</sup>	3%	13 <sup>th</sup>	2%	8%
Denver	76%	12 <sup>th</sup>	9%	14 <sup>th</sup>	5%	13 <sup>th</sup>	2%	14 <sup>th</sup>	2%	7%
Phoenix	77%	13 <sup>th</sup>	11%	3 <sup>rd</sup>	2%	20 <sup>th</sup>	2%	18 <sup>th</sup>	3%	6%
Baltimore	77%	14 <sup>th</sup>	8%	21 <sup>st</sup>	7%	10 <sup>th</sup>	3%	10 <sup>th</sup>	2%	4%
Minneapolis-St. Paul	77%	15 <sup>th</sup>	9%	15 <sup>th</sup>	5%	14 <sup>th</sup>	2%	21 <sup>st</sup>	2%	5%
<b>United States</b>	<b>77%</b>	<b>---</b>	<b>9%</b>	<b>---</b>	<b>5%</b>	<b>---</b>	<b>3%</b>	<b>---</b>	<b>1%</b>	<b>5%</b>
Riverside-San Bernardino	77%	16 <sup>th</sup>	13%	1 <sup>st</sup>	2%	19 <sup>th</sup>	2%	17 <sup>th</sup>	1%	5%
Pittsburgh	78%	17 <sup>th</sup>	8%	22 <sup>nd</sup>	6%	12 <sup>th</sup>	3%	12 <sup>th</sup>	1%	4%
Atlanta	78%	18 <sup>th</sup>	10%	10 <sup>th</sup>	3%	16 <sup>th</sup>	1%	22 <sup>nd</sup>	2%	6%
Miami	79%	19 <sup>th</sup>	9%	16 <sup>th</sup>	4%	15 <sup>th</sup>	2%	15 <sup>th</sup>	2%	5%
San Antonio	80%	20 <sup>th</sup>	11%	4 <sup>th</sup>	2%	21 <sup>st</sup>	2%	19 <sup>th</sup>	1%	4%
Houston	80%	21 <sup>st</sup>	11%	5 <sup>th</sup>	2%	22 <sup>nd</sup>	1%	23 <sup>rd</sup>	2%	3%
Dallas-Fort Worth	81%	22 <sup>nd</sup>	10%	11 <sup>th</sup>	2%	23 <sup>rd</sup>	1%	24 <sup>th</sup>	2%	5%
Charlotte	81%	23 <sup>rd</sup>	9%	17 <sup>th</sup>	2%	24 <sup>th</sup>	1%	25 <sup>th</sup>	1%	5%
Tampa-St. Petersburg	81%	24 <sup>th</sup>	7%	25 <sup>th</sup>	2%	26 <sup>th</sup>	2%	20 <sup>th</sup>	3%	6%
St. Louis	83%	25 <sup>th</sup>	7%	24 <sup>th</sup>	3%	18 <sup>th</sup>	2%	16 <sup>th</sup>	1%	4%
Detroit	84%	26 <sup>th</sup>	9%	18 <sup>th</sup>	2%	25 <sup>th</sup>	1%	26 <sup>th</sup>	1%	3%

Source: U.S. Census Bureau, American Community Survey 2014 One-Year Estimates. Metro areas are ranked from lowest to highest for “drove alone”, and from highest to lowest for all other modes.



**FIGURE 38: CHANGE IN PERCENTAGE OF COMMUTERS WHO DROVE ALONE, 2006–2013**



Source: U.S. Census Bureau, American Community Survey 2006–2013 One-Year Estimates.

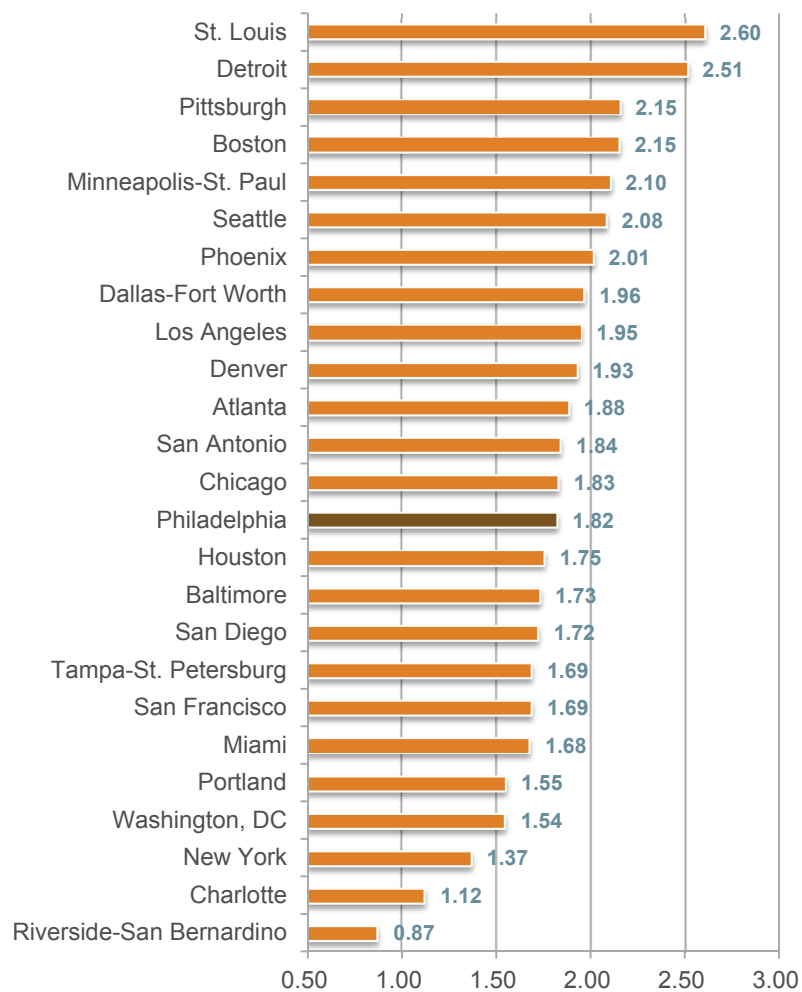
### Congestion

Figure 39, Table 48, and Table 49 present indicators of traffic congestion in each of the metro areas. The Philadelphia metro ranks 14<sup>th</sup> in arterial and freeway lanes miles per capita, as illustrated in Figure 39. On a per capita basis, the region ranks third for the lowest daily vehicle miles traveled (DVMT), as indicated in Table 48 (behind only New York and Pittsburgh). When comparing the DVMT to the miles of freeway, as another measure of congestion, the Philadelphia metropolitan area again ranks third, with fewer daily vehicles per freeway mile in only the Pittsburgh and St. Louis metro areas.

Table 49 lists additional congestion indicators for each region, including annual hours of delay caused by congestion, excess fuel consumed due to congestion, and the annual cost of congestion per commuter. The Philadelphia metro ranks 9<sup>th</sup> in both the annual hours of delay and increased costs, and ranks 12<sup>th</sup> in excess fuel consumed. The Philadelphia region ranks lower for these indicators than many smaller metros (including Pittsburgh and Baltimore) but better than other large North East metros, including Boston, New York, and Washington, DC.



**FIGURE 39: FREEWAY AND ARTERIAL LANE MILES PER CAPITA, 2014**



Source: Texas A&M Transportation Institute, 2015 Urban Mobility Study. Numbers are total lane miles per 1,000 residents.

**TABLE 48: AVERAGE DAILY VEHICLE MILES TRAVELED (DVMT) PER CAPITA AND AVERAGE DAILY TRAFFIC (ADT) PER FREEWAY LANE MILE, 2012**

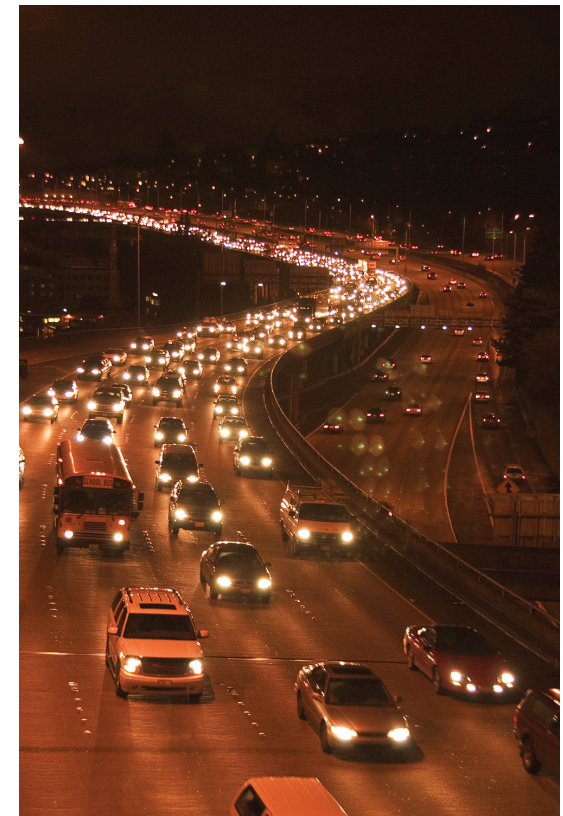
FEDERAL AID URBANIZED AREA	DAILY VEHICLE MILES TRAVELED PER CAPITA		AVERAGE DAILY TRAFFIC PER FREEWAY LANE MILE	
	VMT	Rank	ADT	Rank
New York-Newark	16.3	1 <sup>st</sup>	16,037	9 <sup>th</sup>
Pittsburgh	19.0	2 <sup>nd</sup>	6,893	1 <sup>st</sup>
Philadelphia	19.8	3 <sup>rd</sup>	14,276	3 <sup>rd</sup>
Chicago	21.1	4 <sup>th</sup>	17,282	17 <sup>th</sup>
Portland	21.9	5 <sup>th</sup>	16,794	15 <sup>th</sup>
Detroit	22.7	6 <sup>th</sup>	15,921	7 <sup>th</sup>
Los Angeles	23.1	7 <sup>th</sup>	23,135	24 <sup>th</sup>
San Francisco	23.8	8 <sup>th</sup>	20,447	22 <sup>nd</sup>
Boston	24.0	9 <sup>th</sup>	15,816	5 <sup>th</sup>
Washington, DC	24.7	10 <sup>th</sup>	17,603	19 <sup>th</sup>
San Diego	24.7	11 <sup>th</sup>	18,863	21 <sup>st</sup>
Minneapolis-St. Paul	24.8	12 <sup>th</sup>	16,204	10 <sup>th</sup>
Denver-Aurora	25.0	13 <sup>th</sup>	16,303	11 <sup>th</sup>
Miami	25.4	14 <sup>th</sup>	17,795	20 <sup>th</sup>
Baltimore	25.4	15 <sup>th</sup>	17,226	16 <sup>th</sup>
Seattle	25.9	16 <sup>th</sup>	16,020	8 <sup>th</sup>
Phoenix-Mesa	27.1	17 <sup>th</sup>	15,898	6 <sup>th</sup>
Houston	27.8	18 <sup>th</sup>	16,633	14 <sup>th</sup>
San Antonio	28.7	19 <sup>th</sup>	16,333	12 <sup>th</sup>
Tampa-St. Petersburg	29.5	20 <sup>th</sup>	15,659	4 <sup>th</sup>
Riverside-San Bernardino	29.5	21 <sup>st</sup>	21,558	23 <sup>rd</sup>
Dallas-Fort Worth	30.5	22 <sup>nd</sup>	16,522	13 <sup>th</sup>
St. Louis	32.0	23 <sup>rd</sup>	12,371	2 <sup>nd</sup>
Atlanta	37.1	24 <sup>th</sup>	17,465	18 <sup>th</sup>

Source: U.S. Department of Transportation, Federal Highway Administration, Highway Statistics, July 2014. The data was reported for federal urbanized aid areas, which do not exactly correspond to metropolitan statistical area geographies. Average daily traffic per freeway lane mile is ranked from lowest to highest.

**TABLE 49: CONGESTION INDICATORS, 2014**

METROPOLITAN AREA	Annual Hours of Delay per Automobile Commuter		Excess Fuel Consumed Due to Congestion		Average Annual Cost of Congestion per Commuter	
	Hours	Rank	Gallons	Rank	Cost	Rank
Pittsburgh	39	1 <sup>st</sup>	21	9 <sup>th</sup>	\$889	2 <sup>nd</sup>
Tampa-St. Petersburg	41	2 <sup>nd</sup>	18	5 <sup>th</sup>	\$907	3 <sup>rd</sup>
San Diego	42	3 <sup>rd</sup>	11	1 <sup>st</sup>	\$887	1 <sup>st</sup>
Charlotte	43	4 <sup>th</sup>	17	2 <sup>nd</sup>	\$963	4 <sup>th</sup>
St. Louis	43	5 <sup>th</sup>	21	10 <sup>th</sup>	\$1,020	6 <sup>th</sup>
San Antonio	44	6 <sup>th</sup>	20	7 <sup>th</sup>	\$1,002	5 <sup>th</sup>
Minneapolis-St. Paul	47	7 <sup>th</sup>	18	3 <sup>rd</sup>	\$1,035	7 <sup>th</sup>
Baltimore	47	8 <sup>th</sup>	21	8 <sup>th</sup>	\$1,115	10 <sup>th</sup>
<b>Philadelphia</b>	<b>48</b>	<b>9<sup>th</sup></b>	<b>23</b>	<b>12<sup>th</sup></b>	<b>\$1,112</b>	<b>9<sup>th</sup></b>
Denver	49	10 <sup>th</sup>	24	13 <sup>th</sup>	\$1,101	8 <sup>th</sup>
Phoenix	51	11 <sup>th</sup>	25	17 <sup>th</sup>	\$1,201	15 <sup>th</sup>
Atlanta	52	12 <sup>th</sup>	20	6 <sup>th</sup>	\$1,130	11 <sup>th</sup>
Miami	52	13 <sup>th</sup>	24	14 <sup>th</sup>	\$1,169	12 <sup>th</sup>
Detroit	52	14 <sup>th</sup>	25	15 <sup>th</sup>	\$1,183	13 <sup>th</sup>
Portland	52	15 <sup>th</sup>	29	21 <sup>st</sup>	\$1,273	16 <sup>th</sup>
Dallas-Fort Worth	53	16 <sup>th</sup>	22	11 <sup>th</sup>	\$1,185	14 <sup>th</sup>
<b>Peer Average</b>	<b>55</b>	<b>---</b>	<b>24</b>	<b>---</b>	<b>\$1,250</b>	<b>---</b>
Riverside-San Bernardino	59	17 <sup>th</sup>	18	4 <sup>th</sup>	\$1,316	17 <sup>th</sup>
Chicago	61	18 <sup>th</sup>	29	19 <sup>th</sup>	\$1,445	19 <sup>th</sup>
Houston	61	19 <sup>th</sup>	29	20 <sup>th</sup>	\$1,490	20 <sup>th</sup>
Seattle	63	20 <sup>th</sup>	28	18 <sup>th</sup>	\$1,491	21 <sup>st</sup>
Boston	64	21 <sup>st</sup>	30	22 <sup>nd</sup>	\$1,388	18 <sup>th</sup>
New York	74	22 <sup>nd</sup>	35	24 <sup>th</sup>	\$1,739	24 <sup>th</sup>
San Francisco	78	23 <sup>rd</sup>	33	23 <sup>rd</sup>	\$1,675	22 <sup>nd</sup>
Los Angeles	80	24 <sup>th</sup>	25	16 <sup>th</sup>	\$1,711	23 <sup>rd</sup>
Washington, DC	82	25 <sup>th</sup>	35	25 <sup>th</sup>	\$1,834	25 <sup>th</sup>

Source: Texas A&M Transportation Institute, 2015 Urban Mobility Study, August 2015.



## Transit

As evidenced in Table 47 (page 78), the Philadelphia region continues to have one of the higher percentages of commuters using public transit, exceeded significantly by New York and San Francisco and, to a lesser extent, Washington, DC; Boston; and Chicago. Table 50 indicates that the Philadelphia area ranked seventh in the number of passenger trips in 2013, significantly exceeded by New York and also behind Los Angeles, Chicago, Washington DC, San Francisco, and Boston. The data for trips is shown as “unlinked trips,” which count individual segments of a trip separately (including transfers). One single linked trip (or journey) may, therefore, include several unlinked trips. The region also ranks seventh in annual passenger miles (including both commuter rail and bus).



**TABLE 50: ANNUAL UNLINKED TRANSIT TRIPS AND TRANSIT PASSENGER MILES, 2013**

METROPOLITAN AREA	PASSENGER TRIPS (IN MILLIONS)		ANNUAL PASSENGER MILES (IN MILLIONS)	
	Trips	Rank	Trips	Rank
New York	4,178	1 <sup>st</sup>	21,435	1 <sup>st</sup>
Los Angeles	680	2 <sup>nd</sup>	3,405	3 <sup>rd</sup>
Chicago	664	3 <sup>rd</sup>	4,099	2 <sup>nd</sup>
Washington, DC	480	4 <sup>th</sup>	2,590	4 <sup>th</sup>
San Francisco	440	5 <sup>th</sup>	2,569	5 <sup>th</sup>
Boston	409	6 <sup>th</sup>	1,908	6 <sup>th</sup>
<b>Philadelphia</b>	<b>372</b>	<b>7<sup>th</sup></b>	<b>1,787</b>	<b>7<sup>th</sup></b>
Seattle	197	8 <sup>th</sup>	1,249	8 <sup>th</sup>
Miami	168	9 <sup>th</sup>	968	9 <sup>th</sup>
Atlanta	140	10 <sup>th</sup>	869	10 <sup>th</sup>
Portland	114	11 <sup>th</sup>	499	16 <sup>th</sup>
Baltimore	108	12 <sup>th</sup>	755	11 <sup>th</sup>
San Diego	102	13 <sup>th</sup>	608	12 <sup>th</sup>
Denver	99	14 <sup>th</sup>	542	14 <sup>th</sup>
Minneapolis-St. Paul	95	15 <sup>th</sup>	506	15 <sup>th</sup>
Houston	82	16 <sup>th</sup>	560	13 <sup>th</sup>
Dallas-Fort Worth	81	17 <sup>th</sup>	468	17 <sup>th</sup>
Phoenix	75	18 <sup>th</sup>	352	18 <sup>th</sup>
Pittsburgh	67	19 <sup>th</sup>	304	20 <sup>th</sup>
St. Louis	50	20 <sup>th</sup>	300	21 <sup>st</sup>
San Antonio	48	21 <sup>st</sup>	207	22 <sup>nd</sup>
Detroit	46	22 <sup>nd</sup>	309	19 <sup>th</sup>
Tampa-St. Petersburg	31	23 <sup>rd</sup>	147	23 <sup>rd</sup>
Charlotte	29	24 <sup>th</sup>	139	24 <sup>th</sup>
Riverside-San Bernardino	26	25 <sup>th</sup>	135	25 <sup>th</sup>

Source: U.S. Department of Transportation, National Transit Database, July 2015.

## Maritime Trade

The Philadelphia region's port facilities are among the busiest in the country. Table 51 provides the combined tonnage of domestic and foreign cargo of ports in the nation's largest combined metropolitan statistical areas. This data comes from the Federal Highway Administration's Freight Analysis Framework (FAF). The FAF uses multiple data sources to estimate freight commodity movements through international gateways, major metropolitan areas, regions, and states. Despite a 28 percent decrease in the tonnage of materials moving through the region's maritime ports between 2003 and 2013 (as illustrated in Figure 40), the region's ports continue to rank 4<sup>th</sup> nationally in total combined tonnage.



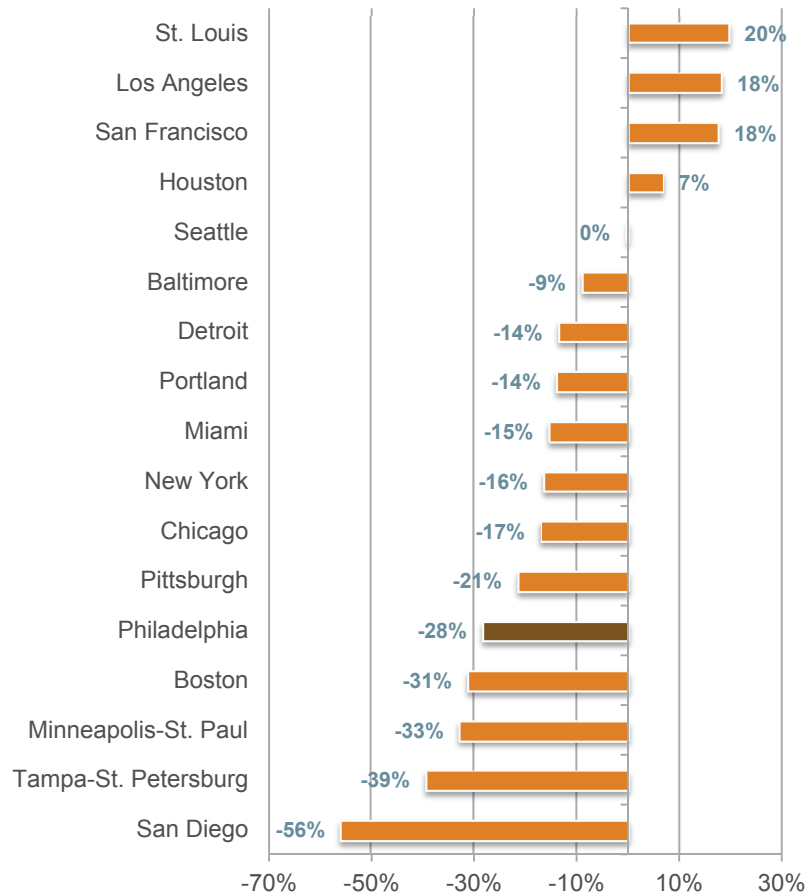
*Philadelphia, Pennsylvania/Gloucester, New Jersey Maritime Port*

**TABLE 51: TOTAL COMBINED TONNAGE OF DOMESTIC AND FOREIGN MARITIME TRADE, 2003 AND 2013**

METROPOLITAN AREA	2003	2013		CHANGE	
	Tons	Tons	Rank	Percentage	Rank
Houston	290.3	310.0	1 <sup>st</sup>	7%	4 <sup>th</sup>
Los Angeles	120.5	142.4	2 <sup>nd</sup>	18%	2 <sup>nd</sup>
New York	149.2	124.8	3 <sup>rd</sup>	-16%	10 <sup>th</sup>
Philadelphia	111	79.6	4 <sup>th</sup>	-28%	13 <sup>th</sup>
San Francisco	39.2	46.1	5 <sup>th</sup>	18%	3 <sup>rd</sup>
Chicago	55.1	45.8	6 <sup>th</sup>	-17%	11 <sup>th</sup>
Seattle	45.1	45.0	7 <sup>th</sup>	0%	5 <sup>th</sup>
St. Louis	32.4	38.8	8 <sup>th</sup>	20%	1 <sup>st</sup>
Baltimore	40.2	36.6	9 <sup>th</sup>	-9%	6 <sup>th</sup>
Tampa-St. Petersburg	58	35.1	10 <sup>th</sup>	-39%	16 <sup>th</sup>
Pittsburgh	41.7	32.7	11 <sup>th</sup>	-21%	12 <sup>th</sup>
Miami	36.6	31.0	12 <sup>th</sup>	-15%	9 <sup>th</sup>
Portland	33.4	28.8	13 <sup>th</sup>	-14%	7 <sup>th</sup>
Detroit	23.4	20.2	14 <sup>th</sup>	-14%	8 <sup>th</sup>
Boston	24.8	17.1	15 <sup>th</sup>	-31%	14 <sup>th</sup>
Minneapolis-St. Paul	6.9	4.6	16 <sup>th</sup>	-33%	15 <sup>th</sup>
San Diego	2.8	1.2	17 <sup>th</sup>	-56%	17 <sup>th</sup>
<b>Total Tonnage</b>	<b>1,110.60</b>	<b>1,039.8</b>	<b>---</b>	<b>-6%</b>	<b>---</b>

*Source: Delaware Valley Regional Planning Commission based on an analysis of U.S. Army Corps of Engineers principal port data. Data includes total tonnage for domestic and foreign maritime trade in millions of short tons, for all ports within each metropolitan area. Metropolitan areas otherwise included in this report but with no active ports are not listed.*

**FIGURE 40: CHANGE IN MARITIME TRADE, 2003 AND 2013**



Source: Delaware Valley Regional Planning Commission based on an analysis of U.S. Army Corps of Engineers principal port data. Data includes total tonnage for domestic and foreign maritime trade in millions of short tons, for all ports within each metropolitan area. Metropolitan areas otherwise included in this report but with no active ports are not listed.

## Aviation

Table 52 summarizes annual passenger volumes at each of the metro's major airports. Philadelphia International Airport (PHL) ranks 13<sup>th</sup> among the major metro areas studied. This volume represents an 8 percent increase in passenger traffic since 2004. Of the total volume, 11 percent were international passengers, ranking sixth.

Table 53 lists the dominant airline at each airport and the percentage share of the total passenger volume carried by that airline. Airports dependent on a single dominant air carrier may be more susceptible to economic downturns and changes within that particular airline. US Airways (now American Airlines) carried 42 percent of all passengers at PHL in 2014, 12<sup>th</sup> highest among the metros, but still significantly less than many other major airports.

Figure 41 illustrates the volume of air freight and mail that traveled through PHL in 2014 (in millions of pounds). Despite having decreased by 36 percent over the decade, PHL continues to rank fourth in air freight and mail, behind only Los Angeles, Newark Liberty International, Chicago's O'Hare International Airport, and Dallas.



**TABLE 52: ANNUAL AIRPORT PASSENGER VOLUME, 2014**

AIRPORT	2014 PASSENGER VOLUME					PERCENTAGE CHANGE SINCE 2004			
	Total Volume		Percent Domestic	International		Domestic	International	Total Passengers	
	Volume	Rank		Percent	Rank			Percent	Rank
Atlanta	40,221	1 <sup>st</sup>	93%	7%	12 <sup>th</sup>	10%	75%	14%	13 <sup>th</sup>
Chicago (O'Hare)	33,655	2 <sup>nd</sup>	92%	8%	9 <sup>th</sup>	-9%	15%	-8%	27 <sup>th</sup>
Dallas	27,587	3 <sup>rd</sup>	93%	7%	10 <sup>th</sup>	6%	49%	9%	19 <sup>th</sup>
Los Angeles	22,833	4 <sup>th</sup>	93%	7%	11 <sup>th</sup>	18%	44%	20%	10 <sup>th</sup>
Denver	19,970	5 <sup>th</sup>	98%	2%	21 <sup>st</sup>	27%	107%	29%	6 <sup>th</sup>
Phoenix	19,134	6 <sup>th</sup>	97%	3%	18 <sup>th</sup>	4%	20%	4%	22 <sup>nd</sup>
Minneapolis	17,144	7 <sup>th</sup>	94%	6%	14 <sup>th</sup>	-2%	3%	-2%	24 <sup>th</sup>
Detroit	16,690	8 <sup>th</sup>	91%	9%	8 <sup>th</sup>	-7%	-5%	-7%	26 <sup>th</sup>
Houston	16,667	9 <sup>th</sup>	85%	15%	4 <sup>th</sup>	6%	44%	11%	17 <sup>th</sup>
New York (Newark Liberty International)	14,080	10 <sup>th</sup>	81%	19%	3 <sup>rd</sup>	4%	51%	13%	14 <sup>th</sup>
Seattle	13,697	11 <sup>th</sup>	94%	6%	15 <sup>h</sup>	24%	40%	25%	7 <sup>th</sup>
San Francisco	13,499	12 <sup>th</sup>	88%	12%	5 <sup>th</sup>	48%	28%	46%	2 <sup>nd</sup>
<b>Philadelphia International</b>	<b>13,421</b>	<b>13<sup>th</sup></b>	<b>89%</b>	<b>11%</b>	<b>6<sup>th</sup></b>	<b>7%</b>	<b>18%</b>	<b>8%</b>	<b>20<sup>th</sup></b>
New York (JFK)	13,154	14 <sup>th</sup>	76%	24%	2 <sup>nd</sup>	25%	62%	34%	3 <sup>rd</sup>
Charlotte	12,387	15 <sup>th</sup>	94%	6%	13 <sup>th</sup>	72%	80%	73%	1 <sup>st</sup>
New York (LaGuardia)	11,909	16 <sup>th</sup>	98%	2%	20 <sup>th</sup>	8%	2%	8%	21 <sup>st</sup>
Miami (Miami International)	11,403	17 <sup>th</sup>	66%	34%	1 <sup>st</sup>	26%	46%	33%	4 <sup>th</sup>
Boston	11,365	18 <sup>th</sup>	95%	5%	16 <sup>th</sup>	22%	-5%	21%	9 <sup>th</sup>
Baltimore	9,714	19 <sup>th</sup>	99%	1%	25 <sup>th</sup>	10%	218%	12%	15 <sup>th</sup>
Washington, DC (Dulles International)	9,689	20 <sup>th</sup>	90%	10%	7 <sup>th</sup>	-20%	54%	-13%	28 <sup>th</sup>
Miami (Fort Lauderdale)	9,421	21 <sup>st</sup>	97%	3%	17 <sup>th</sup>	7%	361%	18%	11 <sup>th</sup>
Chicago (Midway)	9,199	22 <sup>nd</sup>	99%	1%	23 <sup>rd</sup>	10%	6%	10%	18 <sup>th</sup>
Tampa	8,271	23 <sup>rd</sup>	100%	>1%	28 <sup>th</sup>	0%	-79%	0%	23 <sup>rd</sup>
San Diego	8,079	24 <sup>th</sup>	100%	>1%	26 <sup>th</sup>	12%	185%	12%	16 <sup>th</sup>
Washington, DC (Ronald Reagan National)	7,568	25 <sup>th</sup>	99%	1%	24 <sup>th</sup>	32%	25%	32%	5 <sup>th</sup>
Pittsburgh	6,545	26 <sup>th</sup>	97%	3%	19 <sup>th</sup>	-41%	-79%	-42%	30 <sup>th</sup>
Portland	6,261	27 <sup>th</sup>	98%	2%	22 <sup>nd</sup>	24%	79%	25%	8 <sup>th</sup>
St. Louis	6,232	28 <sup>th</sup>	100%	>1%	29 <sup>th</sup>	-3%	-91%	-4%	25 <sup>th</sup>
San Antonio	3,260	29 <sup>th</sup>	100%	>1%	27 <sup>th</sup>	17%	352%	18%	12 <sup>th</sup>
Riverside-San Bernardino	3,231	30 <sup>th</sup>	100%	>1%	30 <sup>th</sup>	-38%	-69%	-38%	29 <sup>th</sup>

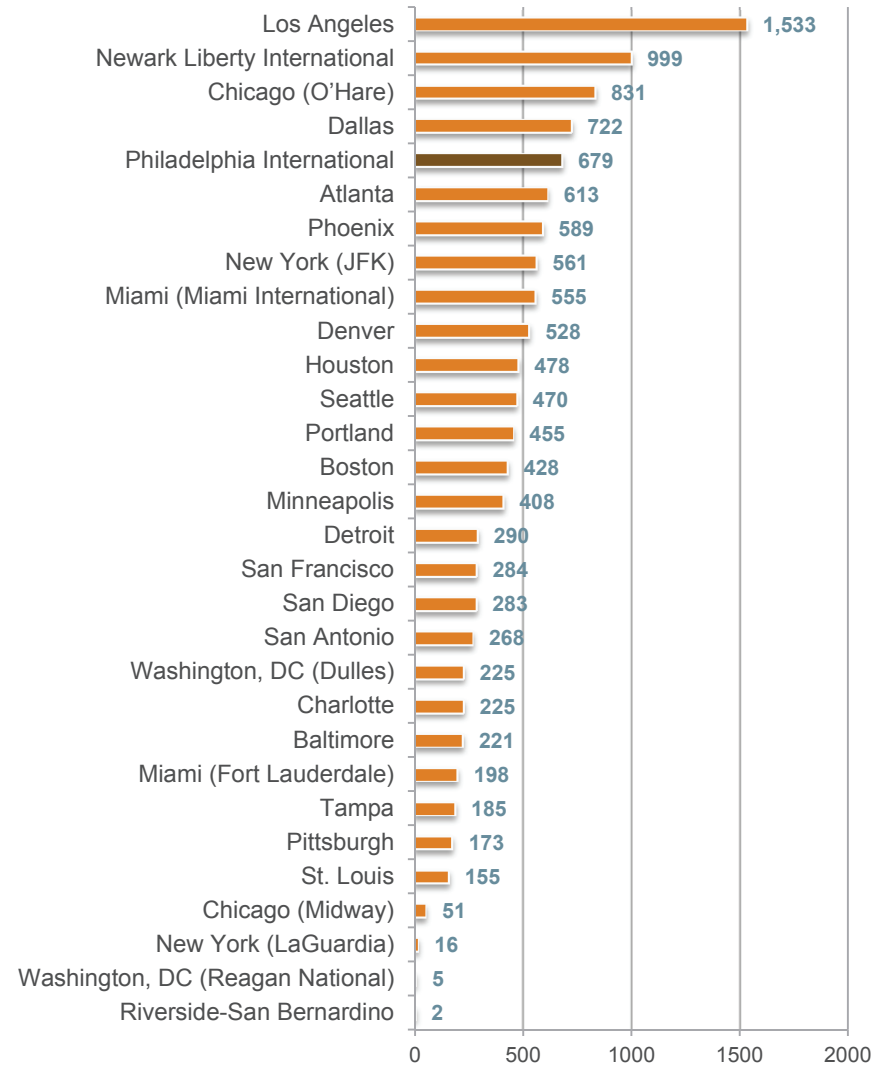
Source: U.S. Bureau of Transportation Statistics, Office of Airline Information. Passenger volume is shown in thousands of passengers.

**TABLE 53: DOMINANT AIRLINE CARRIER SHARE, 2014**

MAJOR AIRPORT	DOMINANT CARRIER	PERCENTAGE OF TOTAL VOLUME
Washington, DC (Ronald Reagan National)	US Airways	18%
Los Angeles	United	18%
Miami (Fort Lauderdale)	Southwest	21%
Portland	Alaska	21%
New York (LaGuardia)	Delta	21%
Pittsburgh	Southwest	23%
Chicago (O'Hare)	United	26%
Denver	Southwest	27%
Boston	Jet Blue	29%
Tampa	Southwest	33%
New York (JFK)	Jet Blue	36%
Phoenix	US Airways	39%
San Francisco	United	39%
San Diego	Southwest	40%
Washington, DC (Dulles)	United	40%
Seattle	Alaska	41%
San Antonio	Southwest	42%
Philadelphia	US Airways	42%
Detroit	Delta	47%
New York (Newark Liberty)	United	49%
Minneapolis	Delta	50%
St. Louis	Southwest	51%
Houston	United	53%
Charlotte	US Airways	59%
Miami International	American	68%
Baltimore	Southwest	69%
Dallas	American	70%
Atlanta	Delta	73%
Chicago (Midway)	Southwest	90%

Source: U.S. Bureau of Transportation Statistics, Research and Innovative Technology Administration. Data is not available for Riverside-San Bernardino. US Airways and American Airlines formally merged in December 2013, and US Airways flew its final flight under its own name in October 2015

**FIGURE 41: AIRLINE FREIGHT AND MAIL VOLUME, 2014**



Source: U.S. Bureau of Transportation Statistics, Research and Innovative Technology Administration. Data is in millions of pounds.





# SUMMARY *and* CONCLUSION

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## SUMMARY AND CONCLUSION

In 1993 and again in 2007, DVRPC published two separate *Rating the Region* reports, both of which compared the Philadelphia metropolitan area to the nation's nine other largest metros, plus Pittsburgh and Baltimore. The current report compares 26 metropolitan areas, including the nation's 25 largest metros (as of 2014) plus the Trenton-Ewing metro, which is part of DVRPC's planning area. As of 2014, the Philadelphia metro was the sixth largest MSA, behind New York, Los Angeles, Chicago, Dallas-Fort Worth, and Houston; based on the 2015 population estimates (released in March 2016), the region's population now ranks 7<sup>th</sup>, having fallen behind the Washington, DC metro area. The Philadelphia metro is also the 7<sup>th</sup> densest; when considered separately, the smaller Trenton-Ewing MSA is the fourth densest area, behind only New York, Los Angeles, and San Francisco.

The report again assesses the state of the Greater Philadelphia region by analyzing a number of indicators to compare it to the nation's other largest metro areas, and, by doing so, identify the region's relative strengths and weaknesses. Greater Philadelphia's strengths include its high quality of life; housing; educational resources and attainment; access to quality health; economic diversity; and transportation assets. Weaknesses, however, include lower educational achievement, income, and employment within its urban areas; relatively high tax burden; and the region's fragmented local governance.

### *Quality of Life*

Greater Philadelphia's residents enjoy a high quality of life, with access to excellent museums, cultural amenities, festivals, recreational venues, and important historical sites. The well-designed grids of small streets in the City of Philadelphia and many of the region's older communities have unmatched charm and function. Thirteen percent of the land area in the City of Philadelphia is dedicated to parks (11<sup>th</sup> among the metros studied), and many of its surrounding suburbs also

have exceptional park systems. The City boasts some of the oldest parks in the country, and Fairmont Park alone occupies over 900 acres in the heart of the City.

However, the City of Philadelphia ranks poorly in terms of capital and operating expenditures in its parks (spending just \$66 per city resident, and ranking 19<sup>th</sup>). This relatively low amount is offset somewhat by the over \$2.5 million spent annually by the Fairmount Park Conservancy, a non-profit foundation dedicated to supporting and improving the Philadelphia parks and recreation system, including both Fairmount Park and a multitude of smaller neighborhood parks.

Philadelphia is consistently ranked as one of the nation's most walkable cities. Over 92 percent of the City's residents have walkable access to parkland, ranking 6<sup>th</sup>, surpassed only by San Francisco, Boston, New York; Washington, DC; and Minneapolis. The Trenton-Ewing metro ranks 2<sup>nd</sup> and the larger Philadelphia metro ranks 12<sup>th</sup> in the number of registered nonprofits listing environmental causes as their primary mission.

The region's air quality continues to improve. Although the Philadelphia region does not currently meet the NAAQS for ground-level ozone or PM<sub>2.5</sub> pollution, the number of annual days of NAAQS violations for ozone or PM<sub>2.5</sub> pollution has trended downward, even while the standards were tightened. The Philadelphia metro had the seventh highest number of days with an unhealthy air quality index in 2014, but that number has declined dramatically since 2005 and is significantly less than the number of unhealthy days in Riverside-San Bernardino, Phoenix, and Los Angeles.

### *Housing*

Although over 50 percent of the average household's income is spent on the cost of housing plus transportation in the Philadelphia metro, this percentage is the 10<sup>th</sup> lowest among the 26 metros studied, lower than other large metros such as Los Angeles, Houston, Chicago, and

Dallas-Fort Worth, and comparable to both New York and Boston. The ratio of median housing value to household income in the Trenton-Ewing metro is 12<sup>th</sup> lowest among the metros studied, and the Philadelphia metro ranks 14<sup>th</sup>.

While the region has historically offered relatively affordable homeownership opportunities, rental housing costs remain a cause for concern. Additionally, although housing in the region as a whole is relatively affordable compared to other major metropolitan areas, much of the region's affordable housing stock is located in its core cities and older suburbs. Many of the region's largest employers, however, are located in suburban areas, where housing is relatively unaffordable (especially for entry- and mid-level employees). Limited affordable housing opportunities within a reasonable commute of the workplace affects workers' quality of life and can have significant consequences for employers, including difficulty in attracting and maintaining a qualified workforce, increased retraining costs, a need to pay disproportionately high wages, and decreased employee productivity.

### *Educational Attainment*

The Philadelphia metro ranks as one of the nation's leading centers for higher education. As of 2014, over 35 percent of adults over the age of 25 in the Philadelphia metro had completed at least four years of college, including 14 percent who had earned a graduate degree. The number of education and knowledge creation workers per capita in the Trenton-Ewing metro is the 2<sup>nd</sup> highest, and 10<sup>th</sup> highest in the Philadelphia metro.

Although the region has an extensive network of quality educational facilities and is home to a highly educated workforce overall, its greatest educational challenges remain in its core cities, where high school and college graduation rates and standardized test scores are significantly lower than statewide or national averages. The difference between the percent of adults who did not complete high school in the

city versus the metro as a whole is third-highest in the Philadelphia metro, and highest in the Trenton-Ewing metro. This is despite the fact that school spending in the cities of Trenton and Philadelphia rank second and third among the 26 metros, well above the national average.

The ratio between the percent of adults with at least a bachelor's degree in the city versus the suburb is likewise the worst in the Trenton-Ewing metro, with 41 percent of adults in the metro as a whole having earned a degree compared to only 11 percent of adults in the City of Trenton. There is also a discrepancy in the Philadelphia metro, although in Philadelphia's case, the percent of adults with at least a bachelor's degree in the city (at 41 percent) is higher than in the metro as a whole (33 percent).

### *Income*

The Philadelphia and Trenton-Ewing metros also have among the greatest disparities between the median household income in their primary cities (the cities of Philadelphia and Trenton) as compared to the metros overall. This income disparity is undoubtedly related to disparities in educational attainment, lower labor force participation, and higher unemployment. Poverty is likewise concentrated in the primary cities: 13 percent of the metro area's residents live in poverty, compared to 27 percent of the residents of the City of Philadelphia. The disparity is even greater in the Trenton-Ewing metro, with 28 percent of the City of Trenton's residents living in poverty, compared to only 12 percent of the metro as a whole.

The region's educational facilities provide an opportunity to improve the educational disparities between the region's suburbs and urban areas, and consequentially impact income disparity. Partnerships between the region's primary and secondary school systems, community colleges, technical schools, and universities can help the region accomplish its goals of improving and expanding the region's

educational and workforce training networks, providing post-secondary educational opportunities designed to meet the evolving needs of the region's employers, and preparing economically disadvantaged populations to actively participate in the workforce.

### ***Access to Health Care***

The Trenton-Ewing and Philadelphia metro areas are rich in health care resources, and rank third and fourth, respectively, in the number of residents per health care worker (behind only Boston and Pittsburgh). The Philadelphia MSA ranks second in the number of physicians or medical scientists per resident (behind only Boston), ninth in the number of medical technicians, and fourth in the number of therapists and counselors (behind Boston, Trenton-Ewing, and Pittsburgh).

An important demographic trend that is expected to accelerate in the next 25 years is the aging of the region's population. Only in Tampa; Pittsburgh; Miami; St. Louis; and Detroit was the percentage of people over the age of 65 years greater than in the Philadelphia metro in 2014. The number of elderly residents living in the region is expected to increase significantly by 2040, and the needs of these residents will change over time, as people live longer. The region's vast network of health care facilities and service providers can provide the support needed to meet the growing demands of its elderly residents.

### ***Economic Competitiveness***

Greater Philadelphia's economy is among the more diverse of the nation's largest major metropolitan areas, ranking 6<sup>th</sup> behind Chicago, St. Louis, Phoenix, San Antonio, and Dallas. A diverse economy, while not "booming," is resilient, protected from the potential extremes in growth or decline that economies dependent on one or two primary industries often experience. Another regional asset is the available office, industrial, and retail space: although vacancy rates remain

relatively high compared to the nation and to other large metros, the Philadelphia region offers competitive leasing rates.

Greater Philadelphia has a rich history of innovative thinking and bringing promising new technologies to market. Based on EDA's Innovation Index, the Trenton-Ewing metro ranks seventh and the Philadelphia metro ranks 12<sup>th</sup> in terms of the potential for innovation, considering human capital; economic dynamics; productivity and employment; and economic well-being.

An important driver of continued economic growth is the region's ability to transfer innovative discoveries from its many academic and research institutions to industry partners, and to commercialize new technologies to stimulate economic growth. The number of patents issued between 2007 and 2011 per worker in the Trenton-Ewing metro was sixth among the metros studied, and the larger Philadelphia metro area ranked 10<sup>th</sup>.

The Philadelphia region ranks 10<sup>th</sup> in academic research and development expenditures and 11<sup>th</sup> in venture capital investment. Both indicators are low, considering the high number of prestigious universities and research institutions in the region. The amount of venture capital invested in the Philadelphia metro has also increased at a slower rate than in several other major metros, resulting in a declining share of the capital available nationwide being invested here.

Another economic challenge facing the region is its relatively high tax burden. Property taxes present a challenge for the region's residents; the effective property tax rate in the Trenton-Ewing metro is the highest among the 26 areas studied, and the rate in the larger Philadelphia metro ranks as the ninth highest. Additionally, during the public outreach sessions and conversations with local business leaders conducted for the purpose of informing the 2014 regional Comprehensive Economic Development Strategy, numerous business owners cited an unfavorable tax burden as a deterrent to growth.

Although noting that they recognized the value of the public incentives, services, and amenities provided to them, and emphasizing that they are willing to pay their share, many believed that state, county, and local taxes present a major disincentive for growing their businesses.

### ***Transportation***

Greater Philadelphia has an enviable transportation network, including major highways; public transportation options; an international airport plus numerous regional airports; and several port facilities. The region's commuters have shorter average daily commutes than commuters in New York; Washington, DC; Chicago; Boston; and Baltimore. Ten percent of the metro's commuters take advantage of public transportation, and another four percent are able to walk, 4<sup>th</sup> highest among the metros studied.

Additionally, the region's average daily vehicle miles traveled is third lowest among the major metros (higher than only New York and Pittsburgh), and the average daily traffic per freeway lane mile (often cited as a measure of congestion) is also third lowest, behind only Pittsburgh and St. Louis. As one of the oldest cities in the nation, the City of Philadelphia has a compact, walkable downtown, as do the region's three other core cities and many of its older, first-generation suburbs.

The region's highway and transit infrastructure systems, however, are aging. Both require extensive investment to bring them up to a state of good repair, and even more to maintain them into the future. As in most other large metros, extensive maintenance needs in the region dictate that funding for improving or expanding the regional highway and transit infrastructure is most often diverted to rebuild the existing system, putting the region at a competitive disadvantage.

Additionally, although the region's maritime ports continue to rank 4<sup>th</sup> nationally based on total tonnage, the tonnage of materials moving

through the ports declined by 28 percent between 2003 and 2013, a trend which bears watching in the future.

### ***Political Representation***

The Philadelphia region is politically fragmented, with 772 governments in the Philadelphia MSA and an additional 36 governments in the Trenton-Ewing MSA. The persons-per-government ratio in the Philadelphia metro area is seventh-lowest among the 26 metro areas. The region ranks 23<sup>rd</sup> in the number of local governments per capita, ahead of only Minneapolis-St. Paul, St. Louis, and Pittsburgh.

The concept of home rule enhances the ability of local governments to effectively respond to their constituents' unique needs. Having so many government agencies, however, also poses a greater risk of institutional overlap and parochialism. This fragmentation can sometimes make cooperation, collaboration, and implementation of regional goals difficult.

Additionally, multilevel governmental regulations and review processes that unreasonably extend the time that it takes to reach a decision on a proposed development or that impose an unfair tax burden on prospective employers can dissuade businesses from expanding in or relocating to the region. To effectively compete in today's economy, the region's decision makers and policy makers must work cooperatively to make the region attractive to current and prospective employers. More efficient, effective, and collaborative local government is a regional priority.

### ***Conclusion***

Since 1965, DVRPC has addressed the emerging needs of the region through long-range plans that respond to the key issues of the day. *Rating the Region* provides an objective analysis of the state of the Greater Philadelphia region and identifies its relative strengths and

weaknesses compared to other major metropolitan areas. In addition to *Rating the Region*, a related study, *Tracking Progress, Regional Indicators for the Long-Range Plan*, is an ongoing, outcome-based effort to compile a meaningful time series data set that measures progress within the region toward meeting DVRPC's long-range planning goals.

Greater Philadelphia continues to offer a diverse economy, affordable housing opportunities, a quality highway and transit network, relatively short commute times, quality aviation and port facilities, a large number of colleges and universities, and an extensive health care network. The challenge now facing the region is capitalizing and building on these strengths while recognizing and working to address its identified weaknesses.

In comparison to other regions, our transportation network, diverse economic base, relatively low unemployment rate, and research and development capabilities position us for economic growth. These strengths, however, threaten to be checked by the disparities between city and suburban income, low labor force participation, and poor educational attainment in the core cities.

Likewise, our quality of life assets—the colleges and universities, extensive healthcare network, arts and cultural resources, and affordable housing—may be countered by challenges that include a rapidly aging population, limited recreational resource funding, and the fragmentation caused by a large number of government entities, which can at times make it difficult to achieve regional goals.

The region's extensive health care network will be of tremendous value as the region works to meet the needs and demands of its growing elderly population, and health care providers can continue to improve the delivery of services. The region must also continue to market its strengths, including its extensive educational resources, affordable

housing, arts and cultural opportunities, and short average commute times, to help attract and retain young, college-educated professionals.

One of the most serious issues facing the region is the disparity in education and income between the primary cities and the suburbs. Access to existing suburban employment centers must continue to be improved. Combined with job training and workforce development, improved mobility can help provide meaningful employment opportunities for city residents, increase labor force participation, and lower unemployment in the region's primary cities. Increased outreach and partnerships between the region's colleges and universities and the local elementary and secondary schools can increase the motivation and performance of students, particularly in the region's urban districts.

Together, *Rating the Region* and *Tracking Progress* lay the foundation for the development of the region's next Long Range Plan, *Connections 2045*. *Connections 2045* will consider many of the issues raised in this report, and establish a regional vision and goals through 2045. DVRPC's Greater Philadelphia's Futures Group will continue to identify and consider how external forces will impact the region's employers, residents, communities, and workers in the future.

In order to remain a desirable locale and grow in the future, the Greater Philadelphia region must be prepared to compete effectively with other major metros around the country and around the world for new residents, new jobs, and new capital. The strengths of the region will serve us well as we move toward 2045, provided we recognize and respond to our challenges.









# Appendix A



## COMPONENT COUNTIES, PRINCIPAL CITIES, AND PRIMARY CITIES OF METROPOLITAN STATISTICAL AREAS

POPULATION RANK	METROPOLITAN STATISTICAL AREA	COUNTY/CITY	STATE	PRINCIPAL CITIES (PRIMARY CITY IN BOLD ITALICS)
9	Atlanta-Sandy Springs-Roswell, GA	Barrow, Bartow, Butts, Carroll, Cherokee, Clayton, Cobb, Coweta, Dawson, DeKalb, Douglas, Fayette, Forsyth, Fulton, Gwinnett, Haralson, Heard, Henry, Jasper, Lamar, Meriwether, Morgan, Newton, Paulding, Pickens, Pike, Rockdale, Spalding, Walton (GA)	Georgia	<b>Atlanta, GA</b> ; Sandy Springs, GA; Roswell, GA; Alpharetta, GA; Marietta, GA
20	Baltimore-Columbia-Towson, MD	Anne Arundel, Baltimore, Baltimore City, Carroll, Harford, Howard, Queen Anne's (MD)	Maryland	<b>Baltimore, MD</b> ; Columbia, MD; Towson, MD
10	Boston-Cambridge-Newton, MA-NH	Essex, Middlesex, Norfolk, Plymouth, Suffolk (MA); Rockingham, Strafford (NH)	Massachusetts; New Hampshire	<b>Boston, MA</b> ; Cambridge, MA; Newton, MA; Framingham, MA; Waltham, MA
22	Charlotte-Concord-Gastonia, NC-SC	Cabarrus, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Union (NC); Chester, Lancaster, York (SC)	North Carolina, South Carolina	<b>Charlotte, NC</b> ; Concord, NC; Gastonia, NC; Rock Hill, SC
3	Chicago-Naperville-Elgin, IL-IN-WI	Cook, DeKalb, DuPage, Grundy, Kane, Kendall, Lake, McHenry, Will (IL); Jasper, Lake, Newton, Porter (IN); Kenosha (WI)	Illinois, Indiana, Wisconsin	<b>Chicago, IL</b> ; Naperville, IL; Elgin, IL; Gary, IN; Arlington Heights, IL; Evanston, IL; Schaumburg, IL; Skokie, IL; Des Plaines, IL; Hoffman Estates, IL
4	Dallas-Fort Worth-Arlington, TX	Collin, Dallas, Denton, Ellis, Hood, Hunt, Johnson, Kaufman, Parker, Rockwall, Somervell, Tarrant, Wise (TX)	Texas	<b>Dallas, TX</b> ; Fort Worth, TX; Arlington, TX; Plano, TX; Irving, TX; Denton, TX; Richardson, TX

POPULATION RANK	METROPOLITAN STATISTICAL AREA	COUNTY/CITY	STATE	PRINCIPAL CITIES (PRIMARY CITY IN BOLD ITALICS)
21	Denver-Aurora-Lakewood, CO	Adams, Arapaho, Broomfield, Clear Creek, Denver, Douglas, Elbert, Gilpin, Jefferson, Park (CO)	Colorado	<b>Denver, CO</b> ; Aurora, CO; Lakewood, CO; Broomfield, CO
14	Detroit-Warren-Dearborn, MI	Lapeer, Livingston, Macomb, Oakland, St. Clair, Wayne (MI)	Michigan	<b>Detroit, MI</b> ; Warren, MI; Dearborn, MI; Livonia, MI; Troy, MI; Farmington Hills, MI; Southfield, MI; Taylor, MI; Pontiac, MI; Novi, MI
5	Houston-The Woodlands-Sugar Land, TX	Austin, Brazoria, Chambers, Fort Bend, Galveston, Harris, Liberty, Montgomery, Waller (TX)	Texas	<b>Houston, TX</b> ; The Woodlands, TX; Sugar Land, TX; Baytown, TX; Conroe, TX
2	Los Angeles-Long Beach-Anaheim, CA	Los Angeles, Orange (CA)	California	<b>Los Angeles, CA</b> ; Long Beach, CA; Anaheim, CA; Santa Ana, CA; Irvine, CA; Glendale, CA; Torrance, CA; Pasadena, CA; Orange, CA; Costa Mesa, CA; Burbank, CA; Carson, CA; Santa Monica, CA; Newport Beach, CA; Tustin, CA; Monterey Park, CA; Gardena, CA; Arcadia, CA; Fountain Valley, CA
8	Miami-Fort Lauderdale-West Palm Beach, FL	Broward, Miami-Dade, Palm Beach (FL)	Florida	<b>Miami, FL</b> ; Fort Lauderdale, FL; West Palm Beach, FL; Pompano Beach, FL; Miami Beach, FL; Boca Raton, FL; Kendall, FL; Deerfield Beach, FL; Delray Beach, FL; Jupiter, FL

POPULATION RANK	METROPOLITAN STATISTICAL AREA	COUNTY/CITY	STATE	PRINCIPAL CITIES (PRIMARY CITY IN BOLD ITALICS)
16	Minneapolis-St. Paul-Bloomington, MN-WI	Anoka, Carver, Chisago, Dakota, Hennepin, Isanti, Le Sueur, Mille Lacs, Ramsey, Scott, Sherburne, Sibley, Washington, Wright (MN); Pierce, St. Croix (WI)	Minnesota, Wisconsin	<b>Minneapolis, MN</b> ; St. Paul, MN; Bloomington, MN; Plymouth, MN; Eagan, MN; Eden Prairie, MN
1	New York-Newark-Jersey City, NY-NJ-PA	Bergen, Essex, Hudson, Hunterdon, Middlesex, Monmouth, Morris, Ocean, Passaic, Somerset, Sussex, Union (NJ); Bronx, Dutchess, Kings, Nassau, New York, Orange, Putnam, Queens, Richmond, Rockland, Suffolk, Westchester (NY); Pike (PA)	New Jersey, New York, Pennsylvania	<b>New York, NY</b> ; Newark, NJ; Jersey City, NJ; White Plains, NY; New Brunswick, NJ; Lakewood, NJ
6	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	New Castle (DE); Cecil (MD); Burlington, Camden, Gloucester, Salem (NJ); Bucks, Chester, Delaware, Montgomery, Philadelphia (PA)	Delaware, Maryland, New Jersey, Pennsylvania	<b>Philadelphia, PA</b> ; Camden, NJ; Wilmington, DE
12	Phoenix-Mesa-Scottsdale, AZ	Maricopa, Pinal (AZ)	Arizona	<b>Phoenix, AZ</b> ; Mesa, AZ; Scottsdale, AZ; Tempe, AZ
23	Pittsburgh, PA	Allegheny, Armstrong, Beaver, Butler, Fayette, Washington, Westmoreland (PA)	Pennsylvania	<b>Pittsburgh, PA</b>
24	Portland-Vancouver-Hillsboro, OR-WA	Clackamas, Columbia, Multnomah, Washington, Yamhill, (OR); Clark, Skamania (WA)	Oregon, Washington	<b>Portland, OR</b> ; Vancouver, WA; Hillsboro, OR; Beaverton, OR

POPULATION RANK	METROPOLITAN STATISTICAL AREA	COUNTY/CITY	STATE	PRINCIPAL CITIES (PRIMARY CITY IN BOLD ITALICS)
13	Riverside-San Bernardino-Ontario, CA	Riverside, San Bernardino (CA)	California	<b>Riverside, CA</b> ; San Bernardino, CA; Ontario, CA; Corona, CA; Victorville, CA; Temecula, CA; Chino, CA; Redlands, CA
25	San Antonio-New Braunfels, TX	Atascosa, Bandera, Bexar, Comal, Guadalupe, Kendall, Medina, Wilson (TX)	Texas	<b>San Antonio, TX</b> ; New Braunfels, TX
17	San Diego-Carlsbad, CA	San Diego (CA)	California	<b>San Diego, CA</b> ; Carlsbad, CA
11	San Francisco-Oakland-Hayward, CA	Alameda, Contra Costa, Marin, San Francisco, San Mateo (CA)	California	<b>San Francisco, CA</b> ; Oakland, CA; Hayward, CA; Berkeley, CA; San Leandro, CA; Redwood City, CA; San Ramon, CA; Pleasanton, CA; Walnut Creek, CA; South San Francisco, CA; San Rafael, CA
15	Seattle-Tacoma-Bellevue, WA	Kings, Pierce, Snohomish (WA)	Washington	<b>Seattle, WA</b> ; Tacoma, WA; Bellevue, WA; Everett, WA; Kent, WA; Renton, WA; Auburn, WA; Lakewood, WA; Redmond, WA
19	St. Louis, MO-IL	Bond, Calhoun, Clinton, Jersey, Macoupin, Madison, Monroe, St. Clair (IL); Crawford, Franklin, Jefferson, Lincoln, St. Charles, St. Louis, Warren (MO)	Illinois, Missouri	<b>St. Louis, MO</b> ; St. Charles, MO
18	Tampa-St. Petersburg-Clearwater, FL	Hernando, Hillsborough, Pasco, Pinellas (FL)	Florida	<b>Tampa, FL</b> ; St. Petersburg, FL; Clearwater, FL; Largo, FL

POPULATION RANK	METROPOLITAN STATISTICAL AREA	COUNTY/CITY	STATE	PRINCIPAL CITIES (PRIMARY CITY IN BOLD ITALICS)
143	Trenton-Ewing	Mercer, NJ	New Jersey	<b>Trenton, NJ</b>
7	Washington-Arlington-Alexandria, DC-VA-MD-WV	District of Columbia (DC); Calvert, Charles, Frederick, Montgomery, Prince George's (MD); Alexandria City, Arlington, Clarke, Culpeper, Fairfax, Fairfax City, Falls Church City, Fauquier, Fredericksburg City, Loudoun, Manassas City, Manassas Park, Prince William, Rappahannock, Spotsylvania, Stafford, Warren (VA); Jefferson (WV)	District of Columbia, Maryland, Virginia, West Virginia	<b>Washington, DC</b> ; Arlington, VA; Alexandria, VA; Silver Spring, MD; Frederick, MD; Rockville, MD; Bethesda, MD; Gaithersburg, MD; Reston, VA

Source: U.S. Office of Management and Budget, February 2013. Primary city within each metropolitan area is noted in **bold italics**.







# Appendix B



## 2015 METROPOLITAN STATISTICAL AREA (MSA) POPULATION ESTIMATES

Metropolitan area	MSA Population			Rank		Change 2014-2015	
	2014	Adjusted 2014	2015	2014	2015	Absolute	Percentage
New York-Newark-Jersey City, NY-NJ-PA	20,092,883	20,095,119	20,182,305	1	1	87,186	0.4%
Los Angeles-Long Beach-Anaheim, CA	13,262,220	13,254,397	13,340,068	2	2	85,671	0.6%
Chicago-Naperville-Elgin, IL-IN-WI	9,554,598	9,557,294	9,551,031	3	3	-6,263	-0.1%
Dallas-Fort Worth-Arlington, TX	6,954,330	6,958,092	7,102,796	4	4	144,704	2.1%
Houston-The Woodlands-Sugar Land, TX	6,490,180	6,497,864	6,656,947	5	5	159,083	2.4%
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	6,051,170	6,053,720	6,069,875	6	7	16,155	0.3%
Washington-Arlington-Alexandria, DC-VA-MD-WV	6,033,737	6,033,891	6,097,684	7	6	63,793	1.1%
Miami-Fort Lauderdale-West Palm Beach, FL	5,929,819	5,937,100	6,012,331	8	8	75,231	1.3%
Atlanta-Sandy Springs-Roswell, GA	5,614,323	5,615,364	5,710,795	9	9	95,431	1.7%
Boston-Cambridge-Newton, MA-NH	4,732,161	4,739,385	4,774,321	10	10	34,936	0.7%
San Francisco-Oakland-Hayward, CA	4,594,060	4,595,980	4,656,132	11	11	60,152	1.3%
Phoenix-Mesa-Scottsdale, AZ	4,489,109	4,486,543	4,574,531	12	12	87,988	2.0%
Riverside-San Bernardino-Ontario, CA	4,441,890	4,438,715	4,489,159	13	13	50,444	1.1%
Detroit-Warren-Dearborn, MI	4,296,611	4,301,480	4,302,043	14	14	563	0.0%
Seattle-Tacoma-Bellevue, WA	3,671,478	3,672,866	3,733,580	15	15	60,714	1.7%
Minneapolis-St. Paul-Bloomington, MN-WI	3,495,176	3,495,656	3,524,583	16	16	28,927	0.8%
San Diego-Carlsbad, CA	3,263,431	3,265,700	3,299,521	17	17	33,821	1.0%
Tampa-St. Petersburg-Clearwater, FL	2,915,582	2,917,813	2,975,225	18	18	57,412	2.0%

Metropolitan area	MSA Population			Rank		Change 2014-2015	
	2014	Adjusted 2014	2015	2014	2015	Absolute	Percentage
St. Louis, MO-IL	2,806,207	2,806,191	2,811,588	19	20	5,397	0.2%
Baltimore-Columbia-Towson, MD	2,785,874	2,786,853	2,797,407	20	21	10,554	0.4%
Denver-Aurora-Lakewood, CO	2,754,258	2,755,856	2,814,330	21	19	58,474	2.1%
Charlotte-Concord-Gastonia, NC-SC	2,380,314	2,379,177	2,426,363	22	22	47,186	2.0%
Pittsburgh, PA	2,355,968	2,358,096	2,353,045	23	26	-5,051	-0.2%
Portland-Vancouver-Hillsboro, OR-WA	2,348,247	2,348,607	2,389,228	24	23	40,621	1.7%
San Antonio-New Braunfels, TX	2,328,652	2,332,790	2,384,075	25	25	51,285	2.2%
Orlando-Kissimmee-Sanford, FL	2,321,418	2,326,729	2,387,138	26	24	60,409	2.6%
Trenton, NJ	371,532	371,601	371,398	143	143	-203	-0.1%

Source: U.S. Census Bureau, Population Estimates Program, March 2016. On March 24, 2016, the Census Bureau released both 2015 and adjusted 2014 population estimates for counties and MSAs.

## Rating the Region

### Metropolitan Indicators Report

**Publication Number:** 16010

**Date Published:** June 2016

**Geographic Area Covered:**

The nation's 25 largest metropolitan statistical areas (New York; Los Angeles; Chicago; Dallas-Fort Worth; Houston; Philadelphia; Washington, DC; Miami; Atlanta; Boston; San Francisco; Phoenix; Riverside-San Bernardino; Detroit; Seattle; Minneapolis-St. Paul; San Diego; Tampa; St. Louis; Baltimore; Denver; Charlotte; Pittsburgh; Portland; and San Antonio) plus the Trenton-Ewing MSA.

**Key Words:**

Metropolitan statistical area (MSA), demographics, livable communities, the economy, transportation, race, ethnicity, national origin, age, dependency, educational attainment, income, housing, affordability, parks, air quality, clean jobs, safety, health care, arts, recreation, governance, employment, income, real estate, gross domestic product, exports, innovation, internet access, commuting, congestion, transit, maritime trade, aviation.

**Abstract:**

This report compares 26 metropolitan areas in terms of demographics, natural resources and the environment; livable communities; the economy; and transportation. The Philadelphia region's strengths include its diverse economy; relatively affordable housing, myriad of colleges, universities, and cultural opportunities; health care resources; extensive highway and transit network; and quality air and port facilities. These strengths, however, threaten to be checked by regional challenges, including urban concentrations of poverty and unemployment; low labor force participation; disparately low

educational attainment in its cities; an aging population; and fragmented local government. The challenge facing the region is identifying how to capitalize and build on its strengths while recognizing and working to resolve its identified weaknesses.

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