



GROWING

GREATER PHILADELPHIA

comprehensive economic
development strategy

Comprehensive Economic Development Strategy

Fiscal Years 2024-2028





The Delaware Valley Regional Planning Commission (DVRPC) is the federally designated Metropolitan Planning Organization for the Greater Philadelphia region, established by an Interstate Compact between the Commonwealth of Pennsylvania and the State of New Jersey. Members include Bucks, Chester, Delaware, Montgomery, and Philadelphia counties, plus the City of Chester, in Pennsylvania; and Burlington, Camden, Gloucester, and Mercer counties, plus the cities of Camden and Trenton, in New Jersey.

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Introduction

The Comprehensive Economic Development Strategy (CEDS) is the region’s strategy-driven framework to increase economic productivity, diversify local wealth, improve the culture for underrepresented businesses, and increase individual prosperity for the region’s residents. This CEDS covers a nine-county region—Bucks, Chester, Delaware, Montgomery, and Philadelphia in Pennsylvania, and Burlington, Camden, Gloucester, and Mercer in New Jersey. The CEDS was developed through guidance and support by an Economic Development Committee made up of public-and private-sector representatives.

As the Economic Development District, DVRPC manages the regional Comprehensive Economic Development Strategy (CEDS) for Greater Philadelphia, satisfying provisions of the U.S. Economic Development Administration (EDA). The first Greater Philadelphia Economic Development Framework was formally approved by EDA as the regional CEDS in 2009 and recently updated in 2019.

To remain eligible for EDA funding, the CEDS must be updated every 5 years. DVRPC convenes partners to develop an economic development strategy that serves as the required vehicle through which U.S. Economic Development Administration (EDA) evaluates grant requests. Without an EDA-approved CEDS, applicants in the region are ineligible to receive EDA funding.

Preparing the CEDS

This CEDS document, *Growing Greater Philadelphia*, is the result of a 24-month process of conducting research and gathering information from planning partners, stakeholders, and elected officials.

Workshops were held in spring 2023 for interested participants to take part in the regional assessment of strengths, weaknesses, opportunities, and threats (SWOT). Based on feedback from the workshops and the regional assessment, draft goals and strategies were developed in the summer 2023. A follow-up meeting was held in August 2023 to present the results of the SWOT, discuss the state of the regional economy, and refine the draft goals and objectives. Further refinement of the goals and strategies took place over the winter and spring of 2024. A final public comment period took place in spring 2024.

Growing Greater Philadelphia acts as a regional framework for economic development partners to prioritize U.S. EDA economic development investments over the next five years. The report adheres to U.S. Economic Development Administration guidelines and includes a regional snapshot of the most current population, employment, and business data; a regional assessment of the region’s strengths, weaknesses, opportunities, and threats; an analysis of economic trends and sectors; updated goals and strategies as part of a regional action plan; and an analysis of the region’s economic vulnerability.



Chapter 1. Regional Assessment

Regional Assessment: Residents & Workers

STRENGTHS

- ❖ Strong presence of higher educational institutions
- ❖ Diverse mix of ethnic nationalities
- ❖ Access to health care systems and options

WEAKNESSES

- ❖ Government fragmentation does not allow for cohesive planning
- ❖ Entrenched poverty in urban areas requires attention
- ❖ Political leadership is divisive
- ❖ Childcare affordability

OPPORTUNITIES

- ❖ Influx of new immigrant populations contributes to quality of life for residents and businesses
- ❖ New multimodal infrastructure investments
- ❖ Entrenched poverty in urban areas requires attention
- ❖ Infrastructure investments can expand career paths

THREATS

- ❖ Aging workforce presents challenges to sector pipelines
- ❖ Lack of sustainable funding for schools puts a larger burden on communities and individuals
- ❖ Increase in Class A office vacancy
- ❖ Increase in crime/violence

Data Highlights: Residents & Workers

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1. Change in Regional Population (2015-2020)
2. Change in Regional Population by Age (2015-2020)
3. Regional Educational Attainment (2020)
4. Change in Regional Median Household Income (HHI) (2015-2020)
5. Income Required to Afford Median Housing Costs by County: Compared to Average Wages by Sector (2020)
6. Regional Labor Force Participation Rate (2020)
7. Labor Force by Age & County (2020)
8. Health Insurance Coverage (2020)

Figures

1. Population & Employment Change by County (2010-2020)

Population (Table 1)

Greater Philadelphia residents are growing older but also becoming increasingly diverse. The largest net growth was in the *two or more-race* population group (+62%) followed by the *Other Race* population group (+16.9%). The largest decrease was in the *Hawaiian/Pacific Islander* population group (-11%), followed by the *Hispanic/Latino* population group (-3.1%). The White population group also had a large decrease of 112,673 persons (-3%)

Age (Table 2)

The age 70 to 74 group grew by 22%, followed by the 65 to 69 age group, which grew by 19.4%. The largest decreases are found between the ages 40 and 54. The 45-49 age group decreased by 9.4%, followed by the 50-54 age group, which decreased by 9.2%.

Household Income (HHI) (Table 4)

Household income growth increased in all ethnic and racial groups except within the *Other* cohort, which fell by 2.4%. The largest HHI growth is among the Black and Latino population groups, with 19.6% and 14.1%, respectively.

Labor Force (Table 7)

The highest participation rates include workers between the ages 25 and 59. While the region is growing older, the labor force participation rate for the age group between 65 and 74 population remains above 20%.

Figure 1: Population & Employment Change by County (2010-2020)

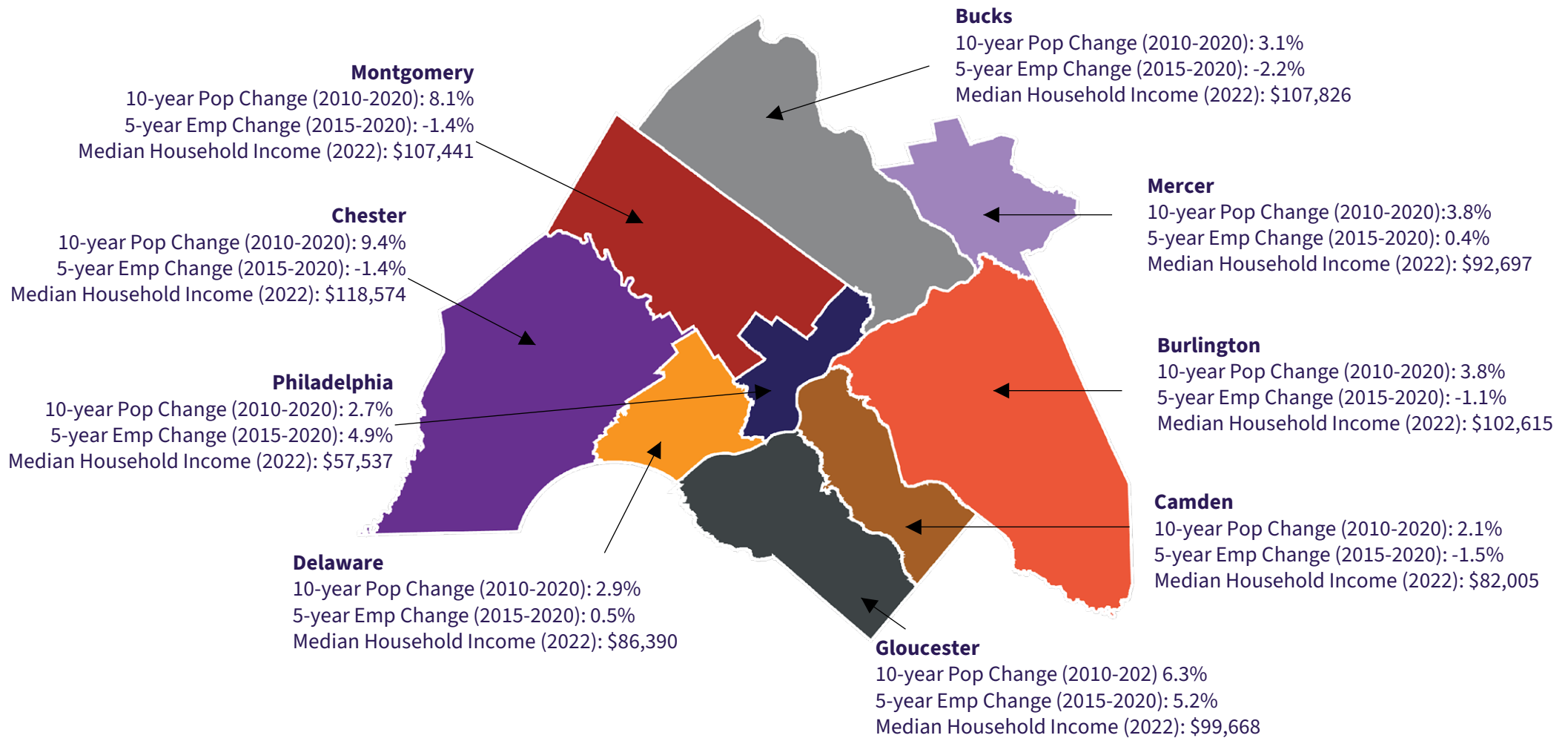
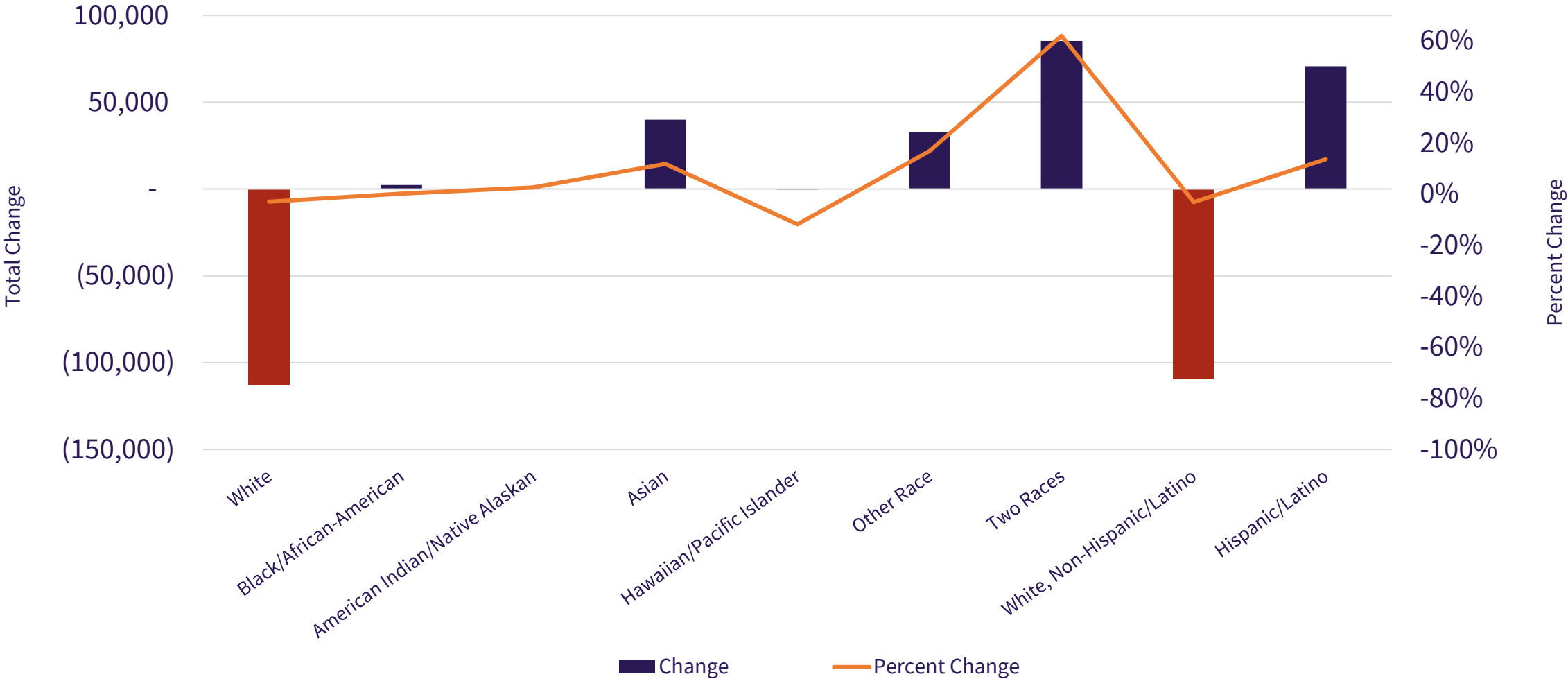
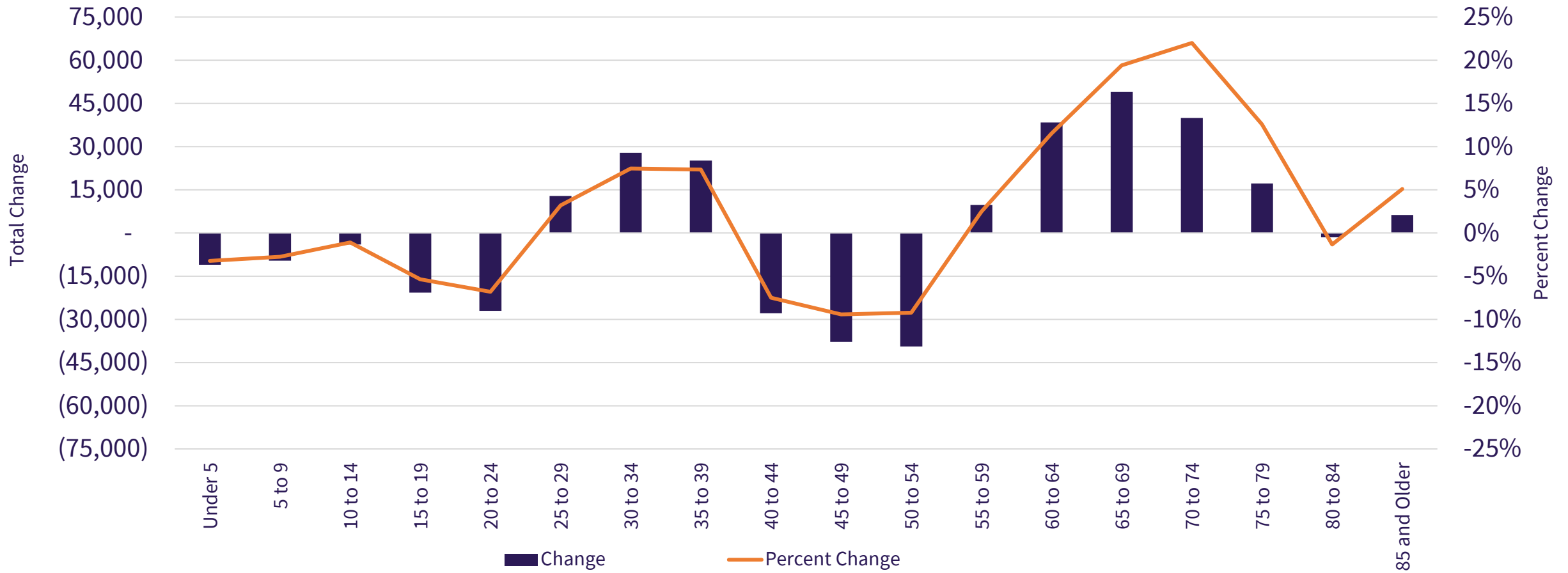


Table 1: Change in Regional Population (2015-2020)



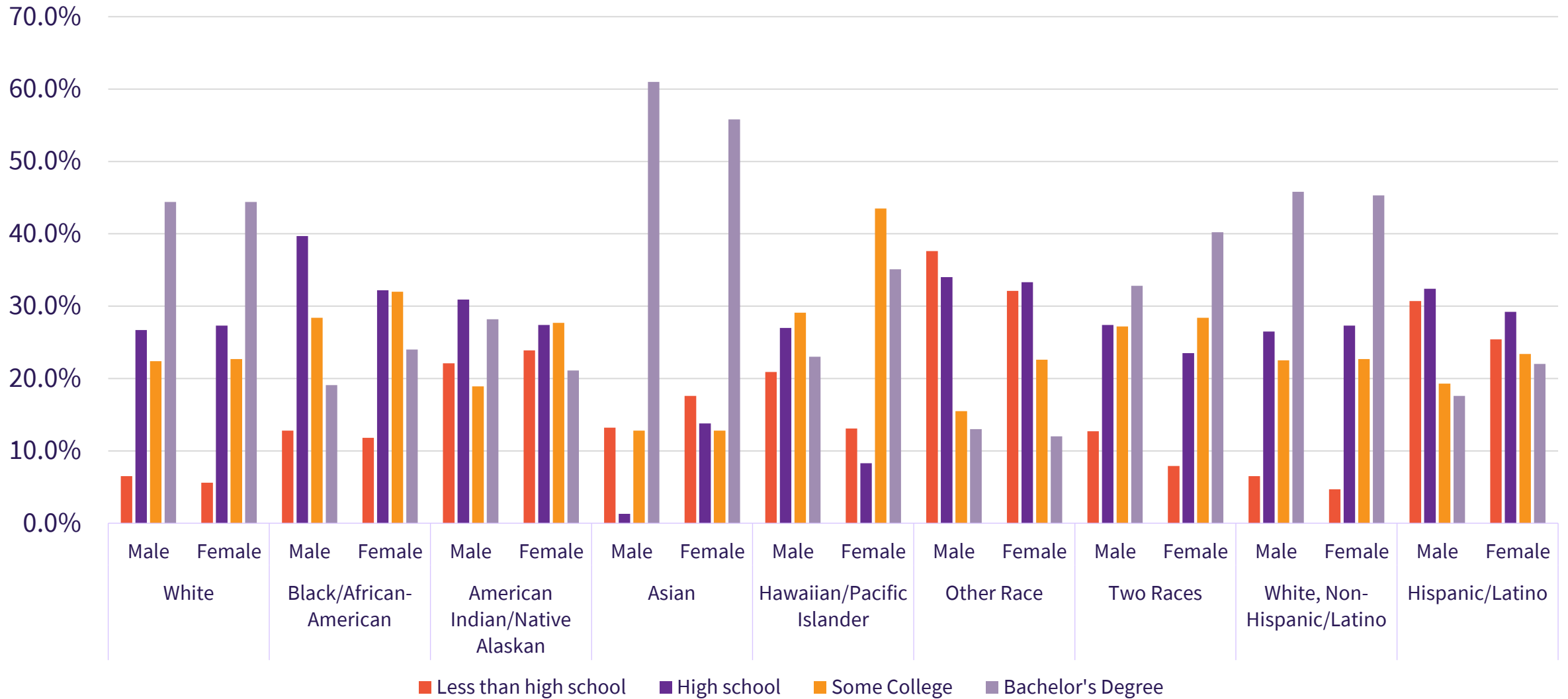
Data Source: ACS 5-Year Estimates (2011-2015, 2016-2020)

Table 2: Change in Regional Population by Age (2015-2020)



Data Source: ACS, 5-Year Estimates (2016-2020)

Table 3: Regional Educational Attainment (2020)



Data Source: ACS 5-Year Estimates (2016-2020)

Table 4: Change in Regional Median Household Income (2015-2020)

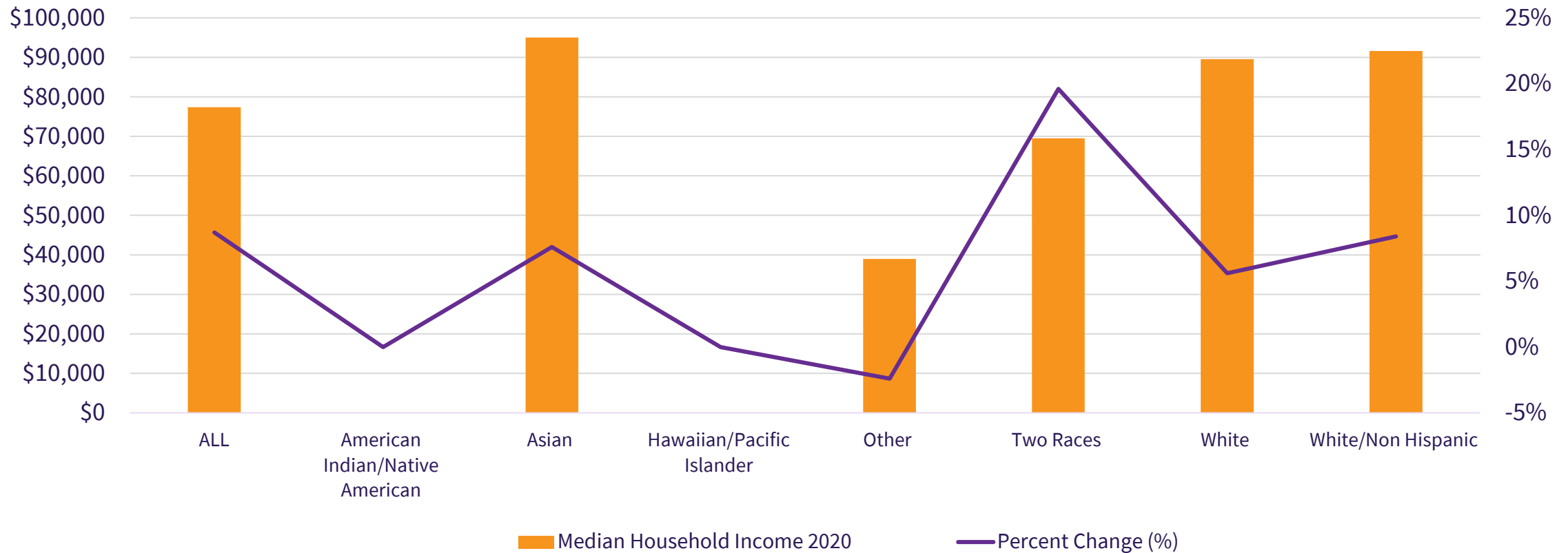
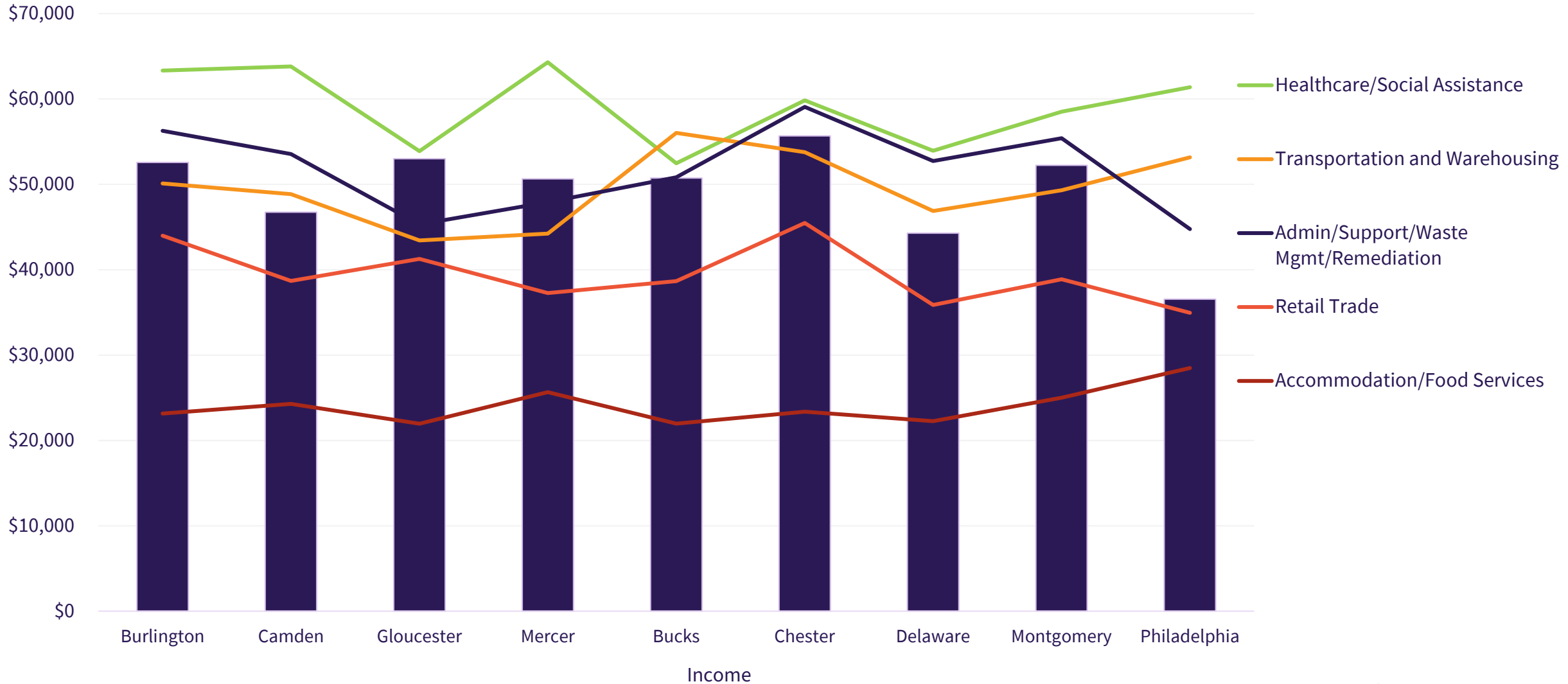
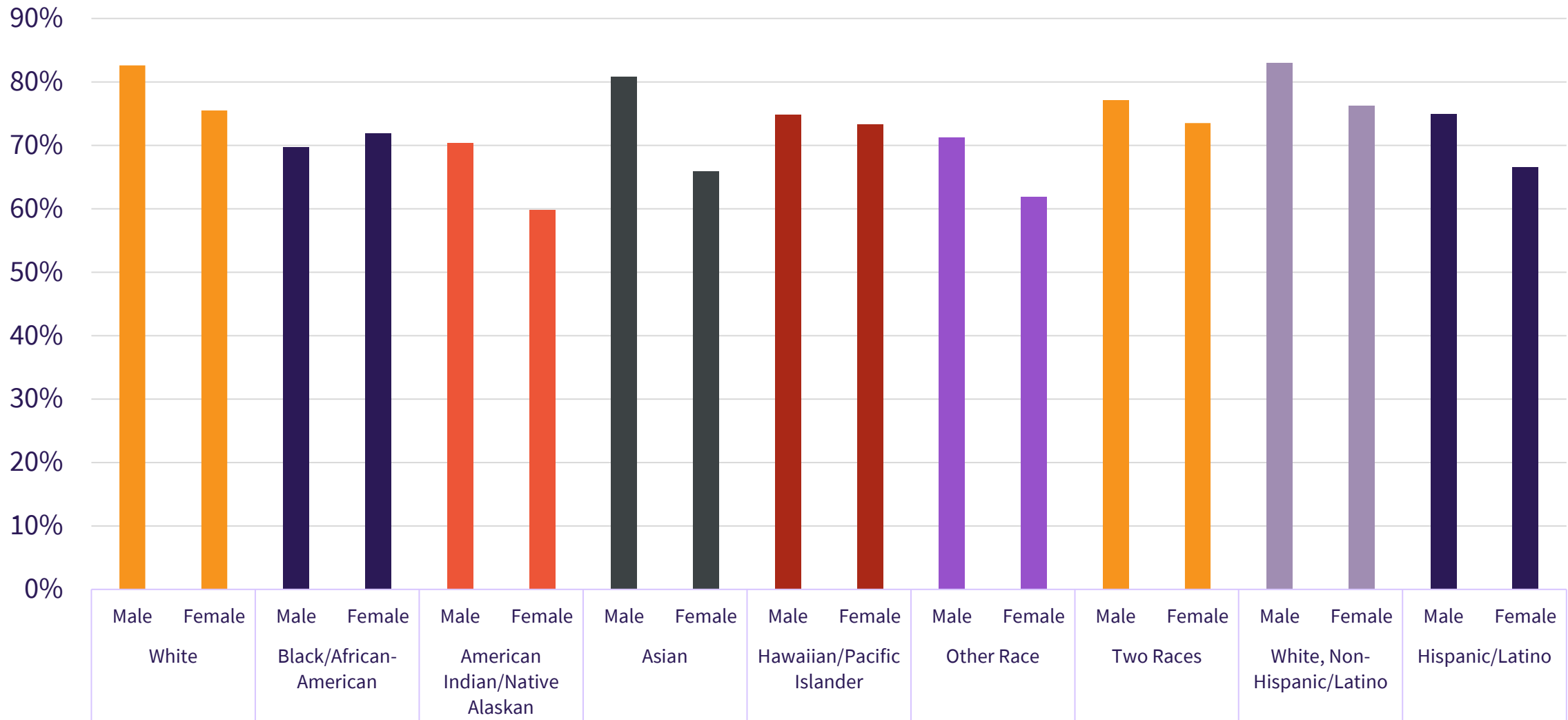


Table 5: Income Required to Afford Median Housing Costs by County: Compared to Average Wages by Sector (2020)



Data Source: Bureau of Economic Analysis (BEA) (2016-2020)

Table 6: Regional Labor Force Participation Rate (2020)



Data Source: ACS 5-Year Estimates (2016-2020)

Table 7: Labor Force by Age & County (2020)

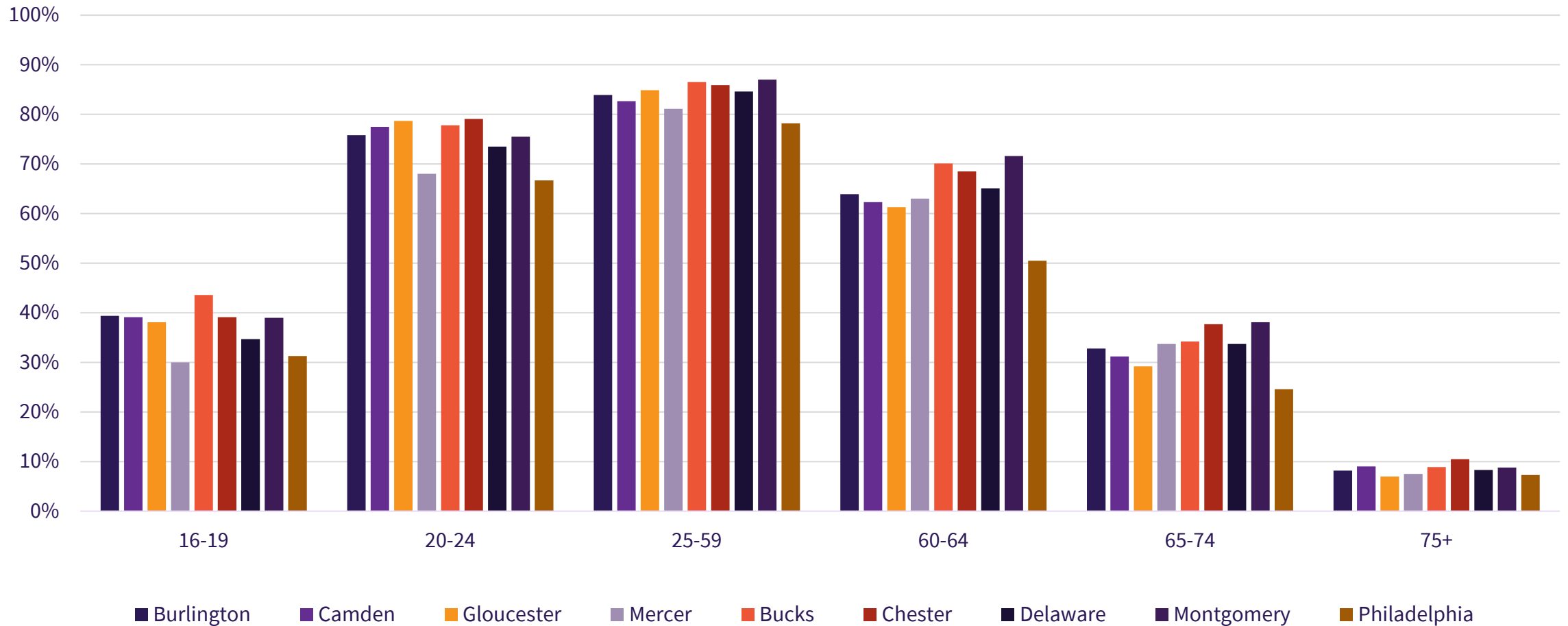
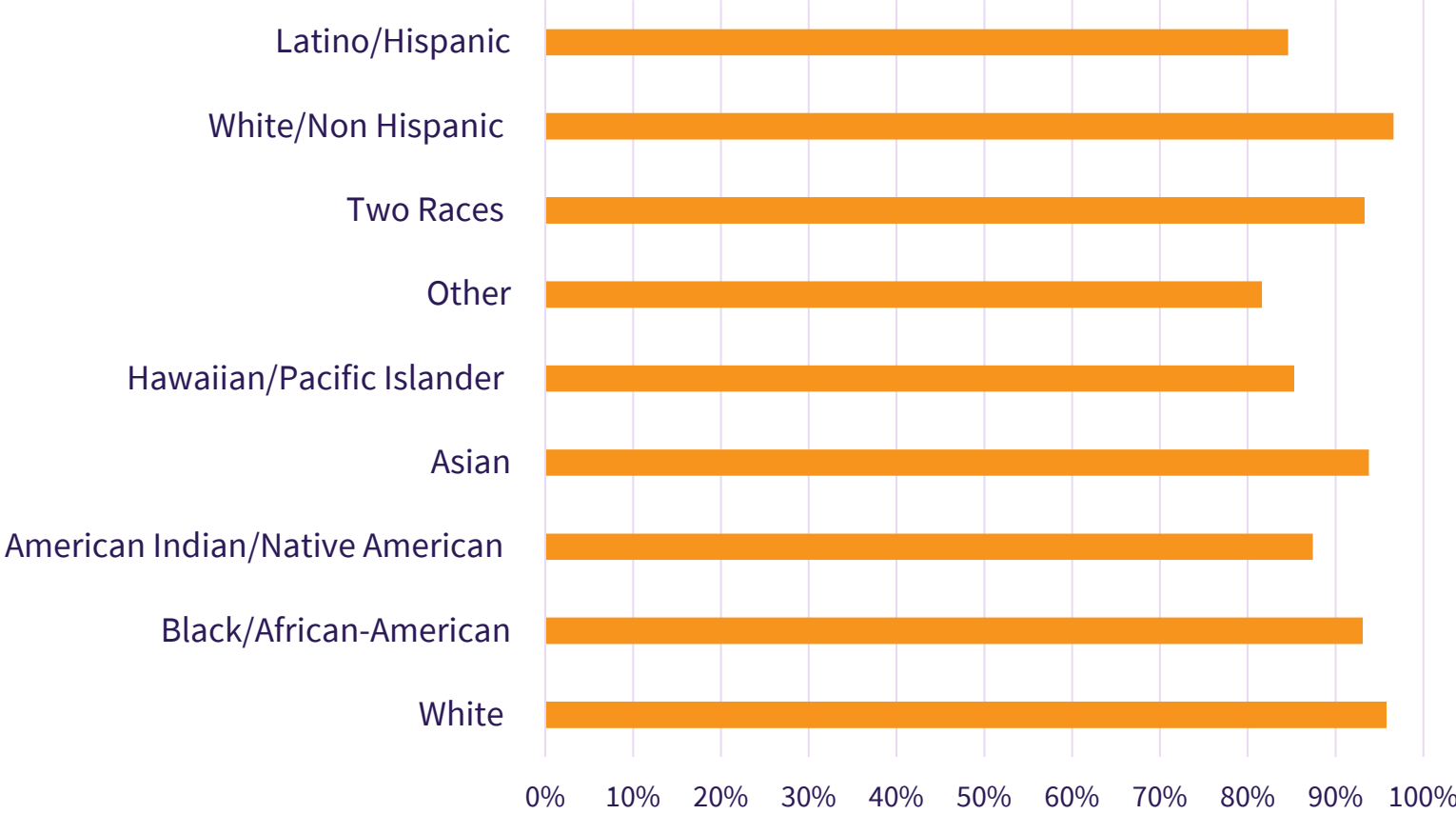


Table 8: Health Insurance Coverage (2020)



Data Source: ACS 5-Year Estimates (2016-2020)

Regional Assessment: Quality of Life/Place Based Dynamics

STRENGTHS

- ❖ Transit accessibility
- ❖ Access to cultural amenities and open spaces
- ❖ Historic sense of place
- ❖ Central location along East Coast

WEAKNESSES

- ❖ Government fragmentation does not allow for cohesive planning
- ❖ Aging housing stock
- ❖ Cost of utility transition for homeowners
- ❖ Aging infrastructure (water, sewer, and roads) in need of expensive repairs

OPPORTUNITIES

- ❖ New efficient industrial sectors are providing new job types that respond to changing economy and workforce
- ❖ Expansion of broadband service and speeds
- ❖ Ability to expand tourism

THREATS

- ❖ Increase in weather events
- ❖ Airport location near low elevation and wetlands
- ❖ Lack of affordable housing is a major challenge for recruiting, retaining, and attracting workers

Data Highlights: Quality of Life/Place Based Dynamics

Clean Economy Sector (Table 9)

The Clean Economy Sector includes the *Electric Power Generation, Transmission and Distribution, and Other Scientific and Technical Consulting Services* industry groups. The *Other Scientific and Technical Consulting* industry group is the largest of the regional clean economy industries with nearly 3,500 employees. Less than 1% (.016%) of the region's total employment is within the Clean Economy sector.

Air Quality (Table 11)

The *Utilities* sector had the highest emissions with 5.7 million metric tons, followed by the *Manufacturing* sector with 4 million metric tons. In 2022, there were no recorded unhealthy days in the Philadelphia MSA. (BLS: "The Utilities sector comprises establishments engaged in the provision of the following utility services: electric power, natural gas, steam supply, water supply, and sewage removal.")

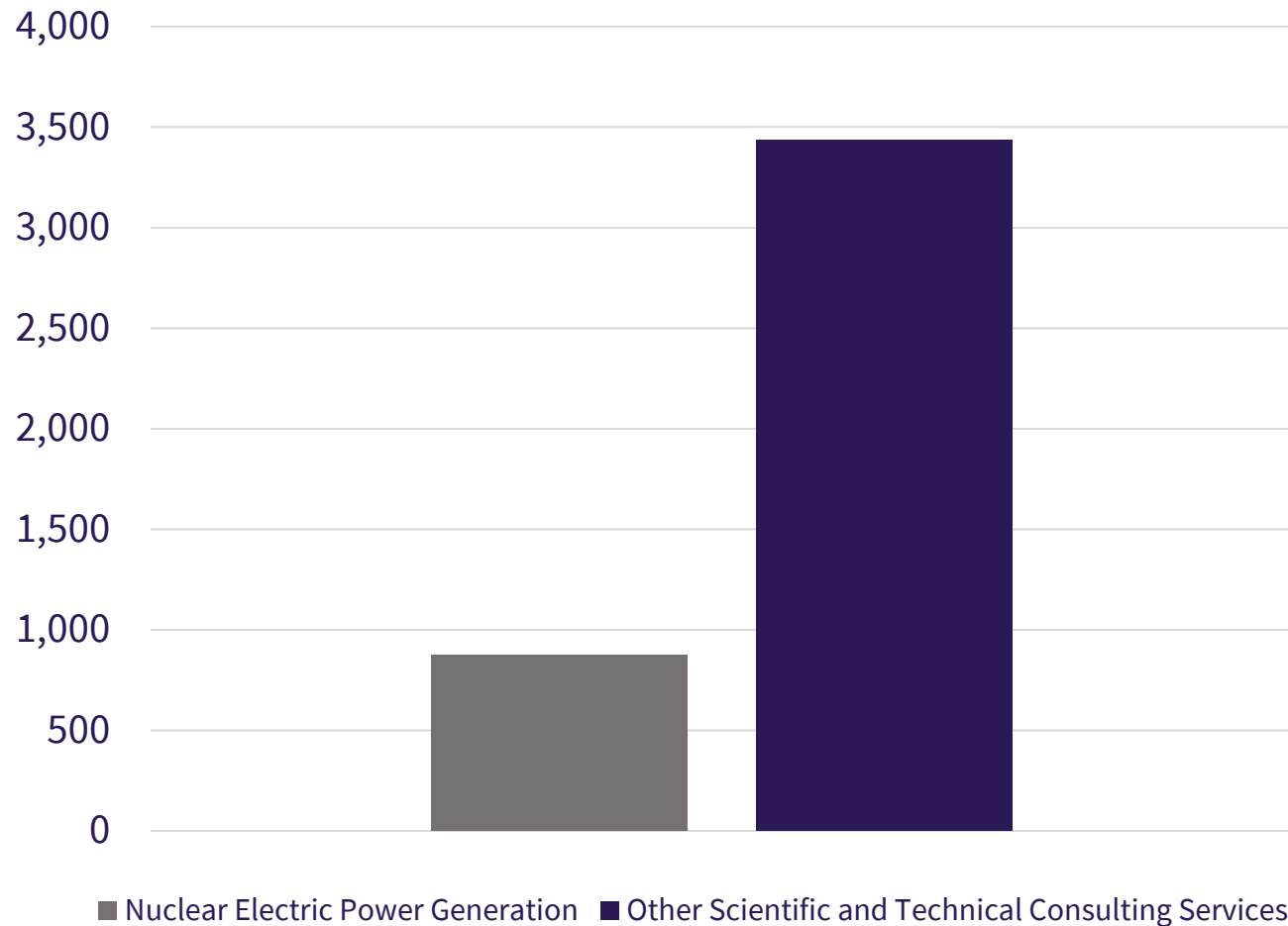
Housing (Table 12, 13, 14)

Over 45% of the region's housing stock was built before 1959 and most of the housing stock are single family, detached units. Approximately 17% of the region's residents are severely housing cost burdened.

Tables

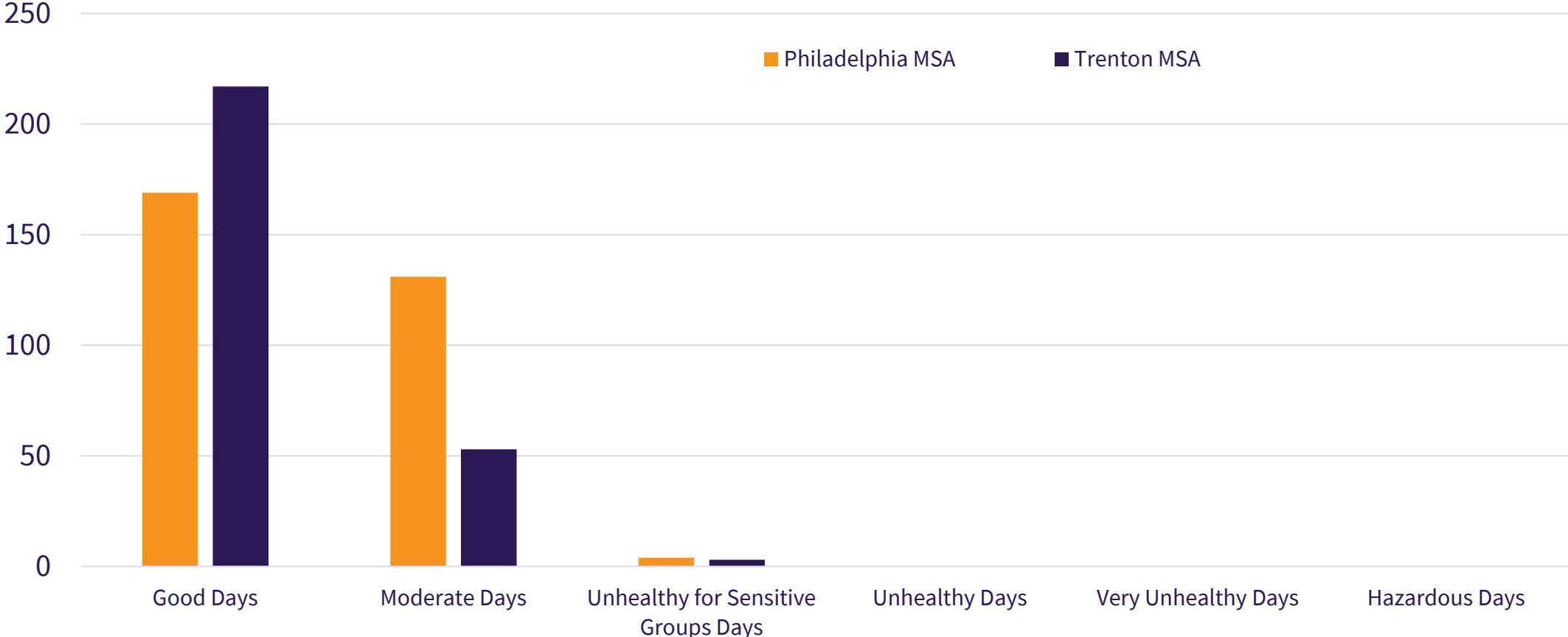
9. Clean Economy Sector Employment (2020)
10. Number of Unhealthy Days (2022)
11. Housing Unit Distribution (2021)
12. Regional Housing Cost Burden (2020)
13. Home Fuel Heating Sources (2020)
14. Age of Housing Stock (2020)
15. Commuting by Public Transit (2020)
16. Internet & Broadband Access (2020)

Table 9: Clean Economy Sector Employment (2020)



This chart shows regional employment in clean industries, which includes the *Electric Power Generation, Transmission and Distribution and Other Scientific and Technical Consulting Services* industry groups. The *Other Scientific and Technical Consulting* industry group is the largest of the clean economy industries with nearly 3,500 employees.

Table 10: Number of Unhealthy Days (2022)



Data Source: U.S. EPA Air Quality Index by CBSA (2020)

Table 11: Housing Unit Distribution (2021)

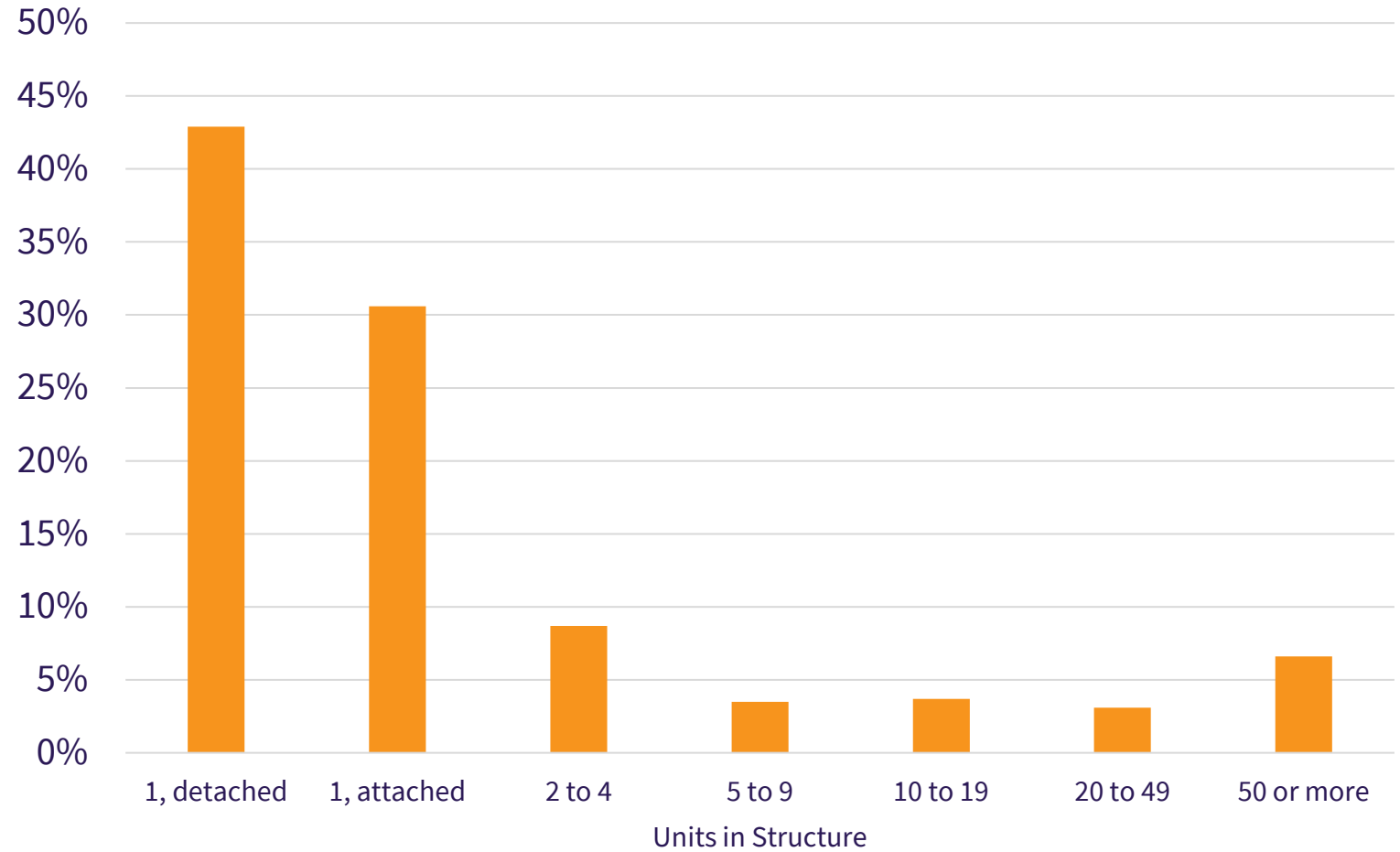
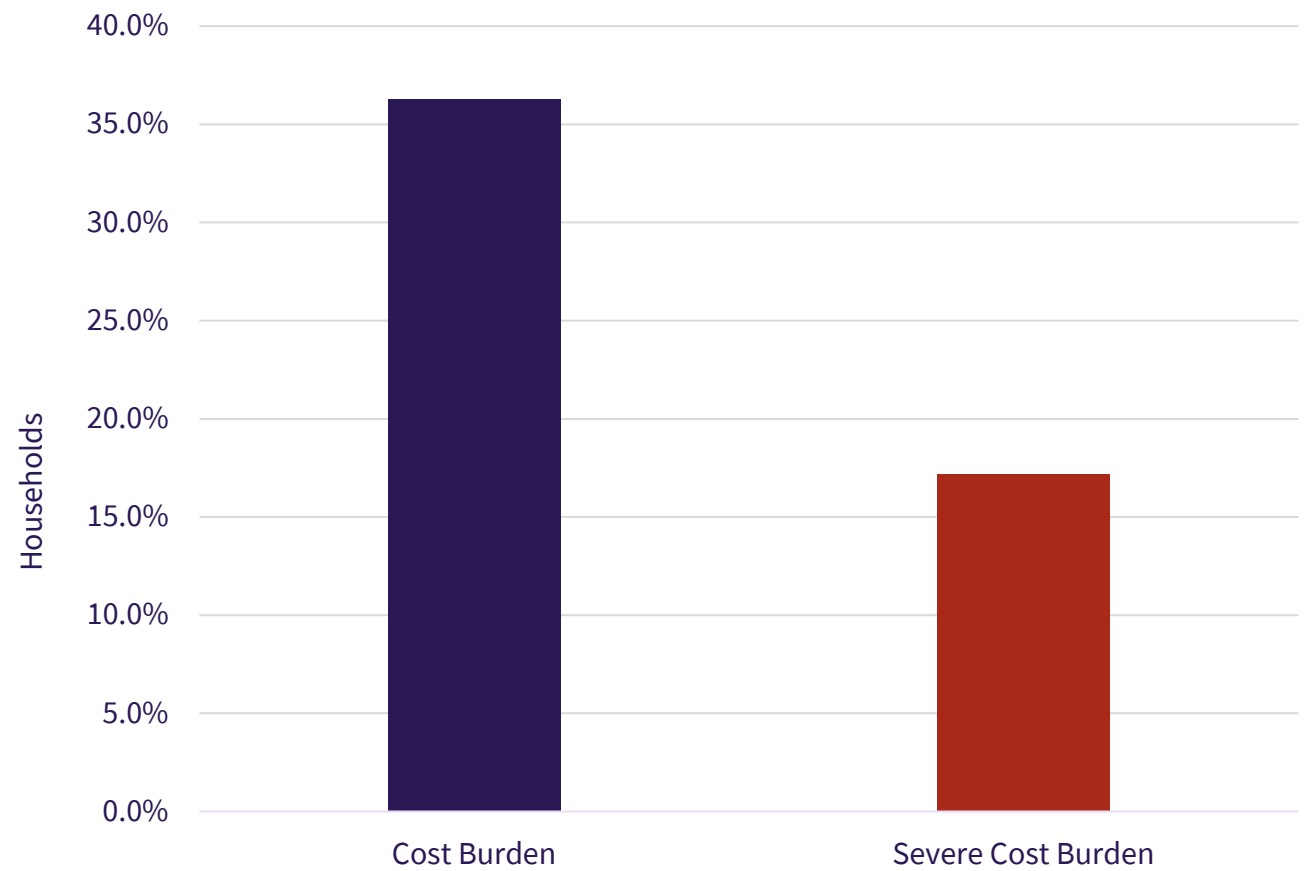


Table 12: Regional Housing Cost Burden (2020)

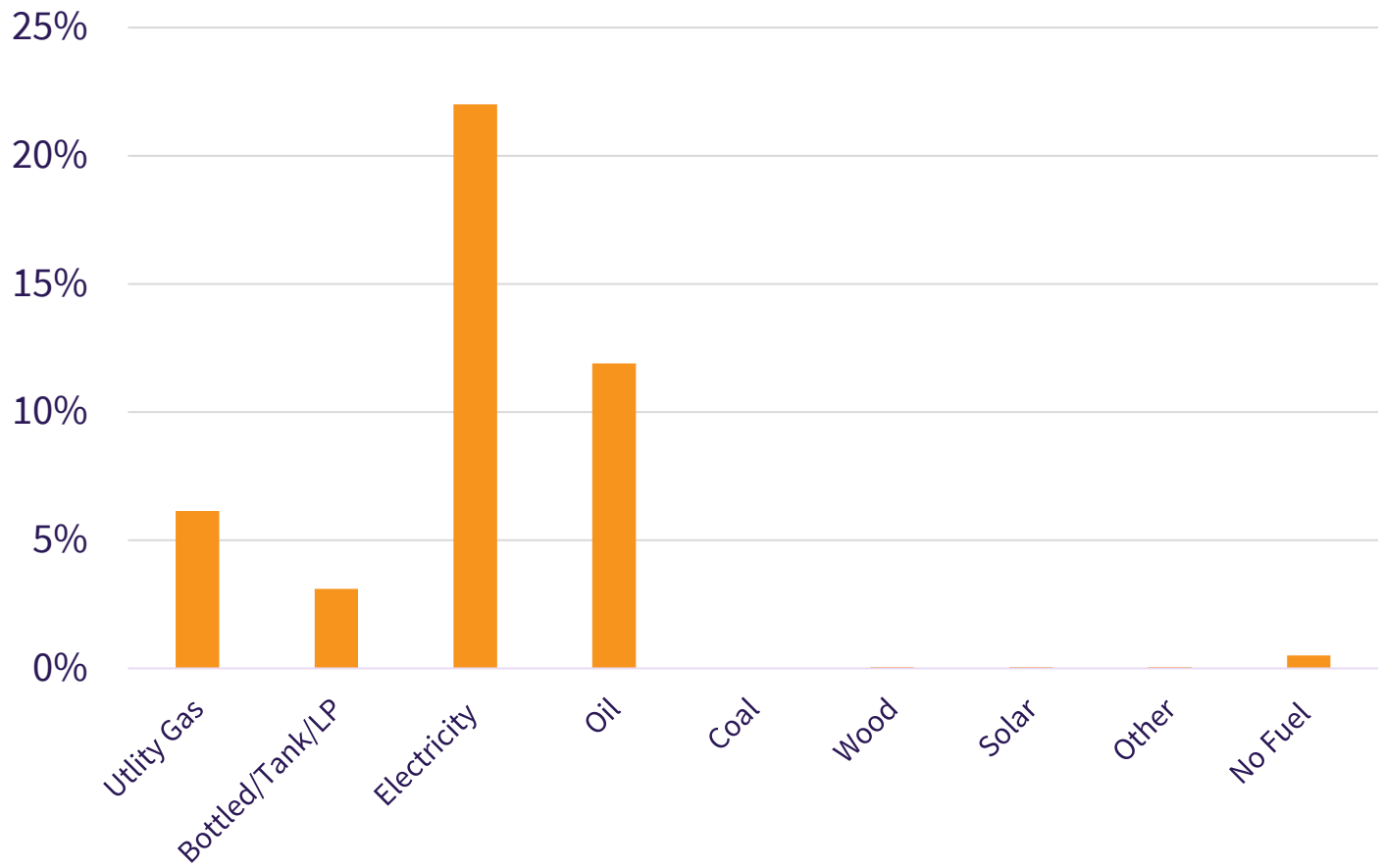
Cost Burden: household spends at least 30 percent of its income on housing costs and utilities.

Severe Cost Burden: household spends at least 50 percent of its income on housing costs and utilities.



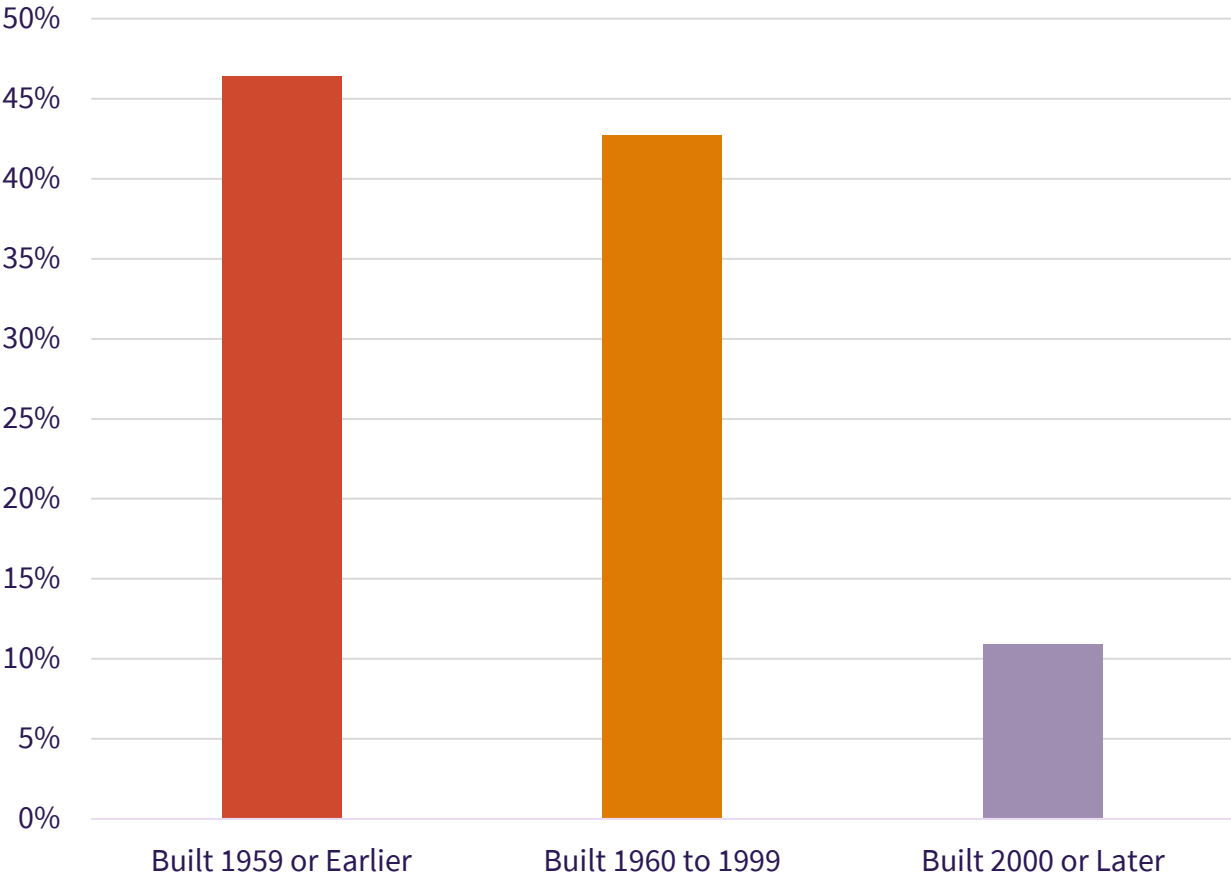
Data Source: ACS 5-Year Estimates (2011-2015, 2016-2020)

Table 13: Home Fuel Heating Sources (2020)



Data Source: ACS 5-Year Estimates (2016-2020)

**Table 14:
Age of Housing
Stock (2020)**



Data Source: ACS 5-Year Estimates (2016-2020)

Table 15: Commuting by Public Transit (2020)

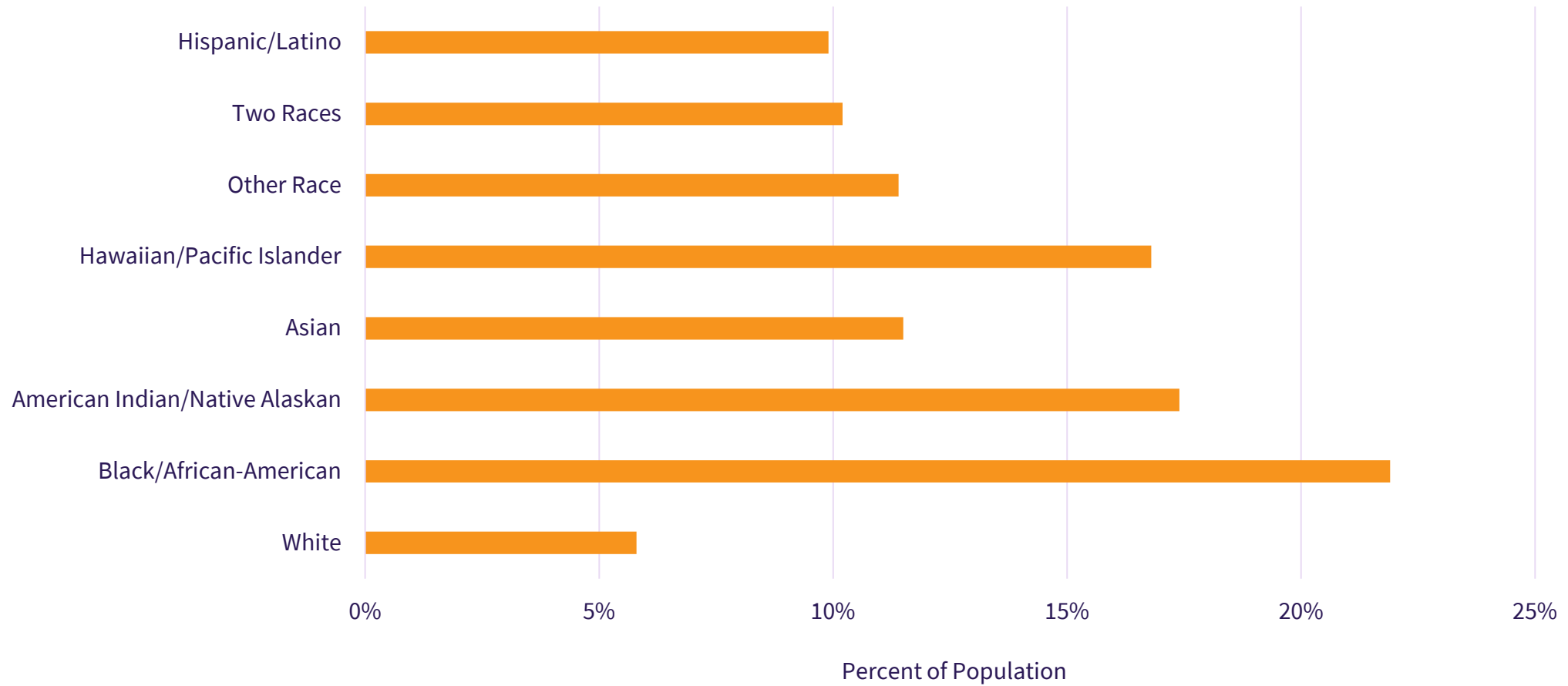
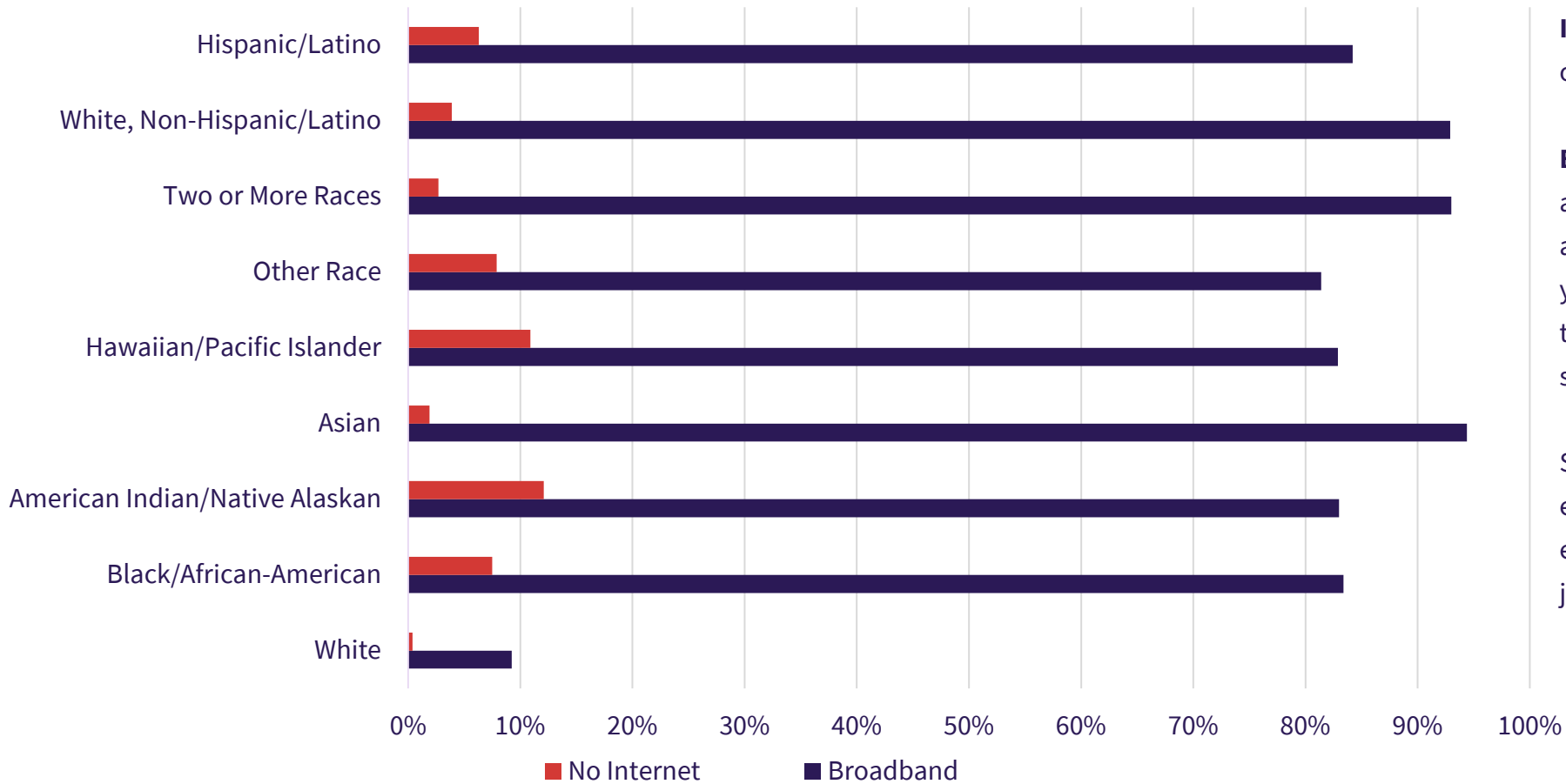


Table 16: Internet & Broadband Access (2020)



Internet: The internet is the worldwide system of connected computers and servers.

Broadband: Broadband refers to the fast, always-on connection that delivers internet to an individual’s home or business. It’s the *how* you access the internet. Common broadband types include fiber optic, cable, DSL, and satellite.

Strong broadband infrastructure drives economic growth by boosting productivity, enabling innovation, and connecting people to jobs and services.

Regional Assessment: Employment & Wealth-Creation

STRENGTHS

- ❖ Positioned to advance innovation and entrepreneurship
- ❖ Designated as a regional tech hub (PROPEL) for precision medicine University City Innovation Center

WEAKNESSES

- ❖ Unclear path for social and economic mobility
- ❖ Political leadership is divisive
- ❖ Limited venture capital Investments
- ❖ Skill mismatch with employment opportunities

OPPORTUNITIES

- ❖ Expand opportunities entrepreneurs and businesses
- ❖ Water ports enable an increase in foreign and domestic investments and expansion
- ❖ Abandoned industrial sites are available for redevelopment
- ❖ International airport and ability to become global player

THREATS

- ❖ Supply chain challenges and risk of automation (ecommerce)
- ❖ Aging labor force will increase the number of retirements
- ❖ Regional talent drain from regional universities
- ❖ Increase in automation and digitization of regional sectors may disrupt employment

Data Highlights: Employment & Wealth-Creation

Per Capita Income (Table 17)

Seven of the region's nine counties experienced a double-digit percent increase in per capita income between 2016 and 2020. Delaware County had largest increase in per capita income (+16.3%). Chester County has the highest per capita income at \$95,483 and Philadelphia has the lowest per capita income at \$60,869.

Wages (Table 18)

The highest weighted annual wages are found in the *Management of Companies/Enterprises* sector (+\$170K), followed by the *Utilities* sector (+\$150K). Conversely, the *Accommodation/Food Services* and *Retail Trade* sectors have the lowest weighted annual wages (\$25K, \$39K), respectively.

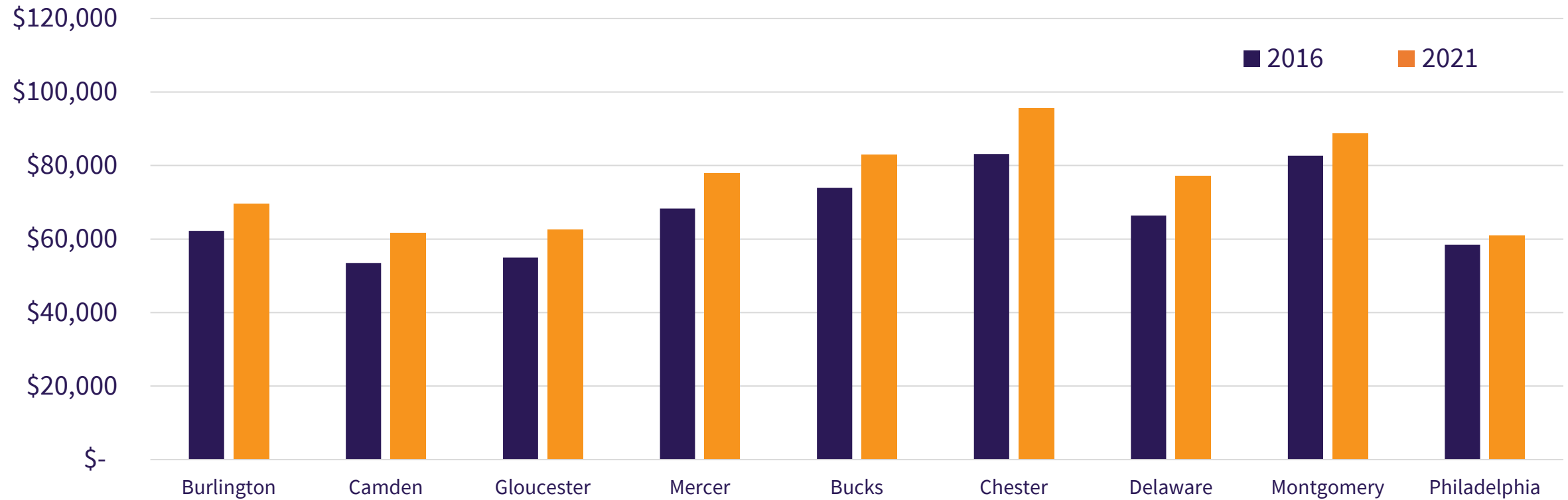
Competitive Sectors (Table 22, 23)

The region's economic strength continues to be the Eds and Meds sectors. *Educational Services* is the region's most competitive sector followed by *Health Care/Social Assistance*. Together, these sectors account for 64.5% of the region's basic jobs. During the COVID-19 pandemic, the region was able to rely on the *Educational Services* and *Health Care/Social Assistance* sectors due to their presence as anchor institutions. The *Mining* sector increased by 31% by 2016, followed by *Management of Companies* (+9.4%) and *Transportation/Warehousing* (+6.4 %)

Tables

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18. Regional Weighted Average Annual Wage by Sector (2020)
19. Change in Regional Employment by Sector (2016-2020)
20. Top Sectors by Location Quotient (LQ) (2020)
21. Largest Location Quotient (LQ) Change (2016-2020)
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23. Competitive Sectors: Basic Employment (2020)
24. Employment, LQ, & Change in Basic Jobs (2020)
25. Shift-Share Analysis: Educational Services(2020)
26. Shift Share Analysis: Management of Companies/Enterprises (2020)
27. Shift Share Analysis: Arts'/Entertainment/ Recreation (2020)
28. Shift Share Analysis: Financial Activities (2020)
29. Shift Share Analysis: Healthcare/Social Assistance (2020)
30. Shift Share Analysis: Professional/Business Services (2020)
31. Shift Share Analysis: Wholesale Trade (2020)
32. Shift Share Analysis: Other Services (2020)
33. Unemployment Rate (%) by Sex, Race, & Ethnicity (2020)
34. Small-Scale Manufacturing Employees (2020)
35. Change in Small-Scale Manufacturing Companies (2016-2020)
36. County Business Ownership by Gender (2017)

Table 17: Changes in Per Capita Income (2016–2021)



2016 values are inflation-adjusted using CPI's
Inflation Calculator (January 2016 to January 2021)

Data Source: Bureau of Economic Analysis (BEA) (2016, 2021)

Table 18: Regional Weighted Average Annual Wage by Sector (2020)

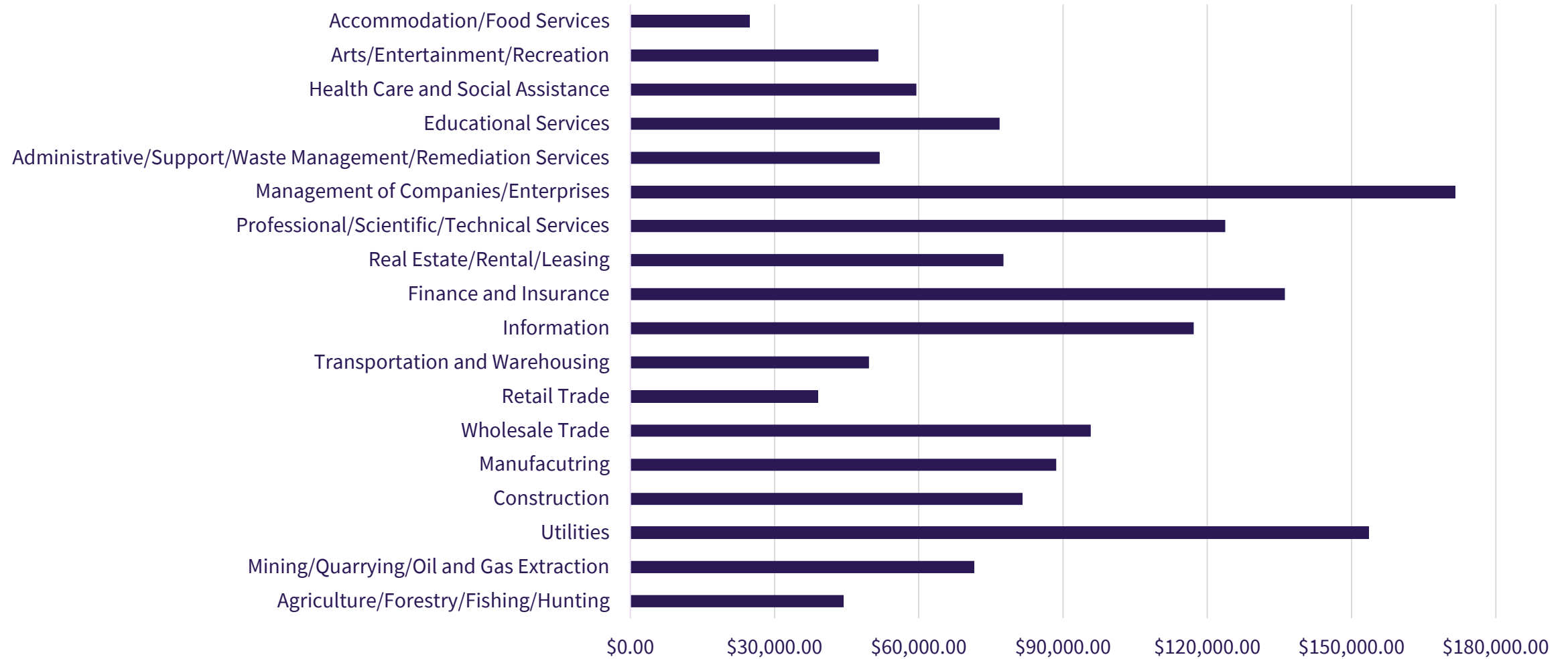


Table 19: Change in Regional Employment by Sector (2016–2020)

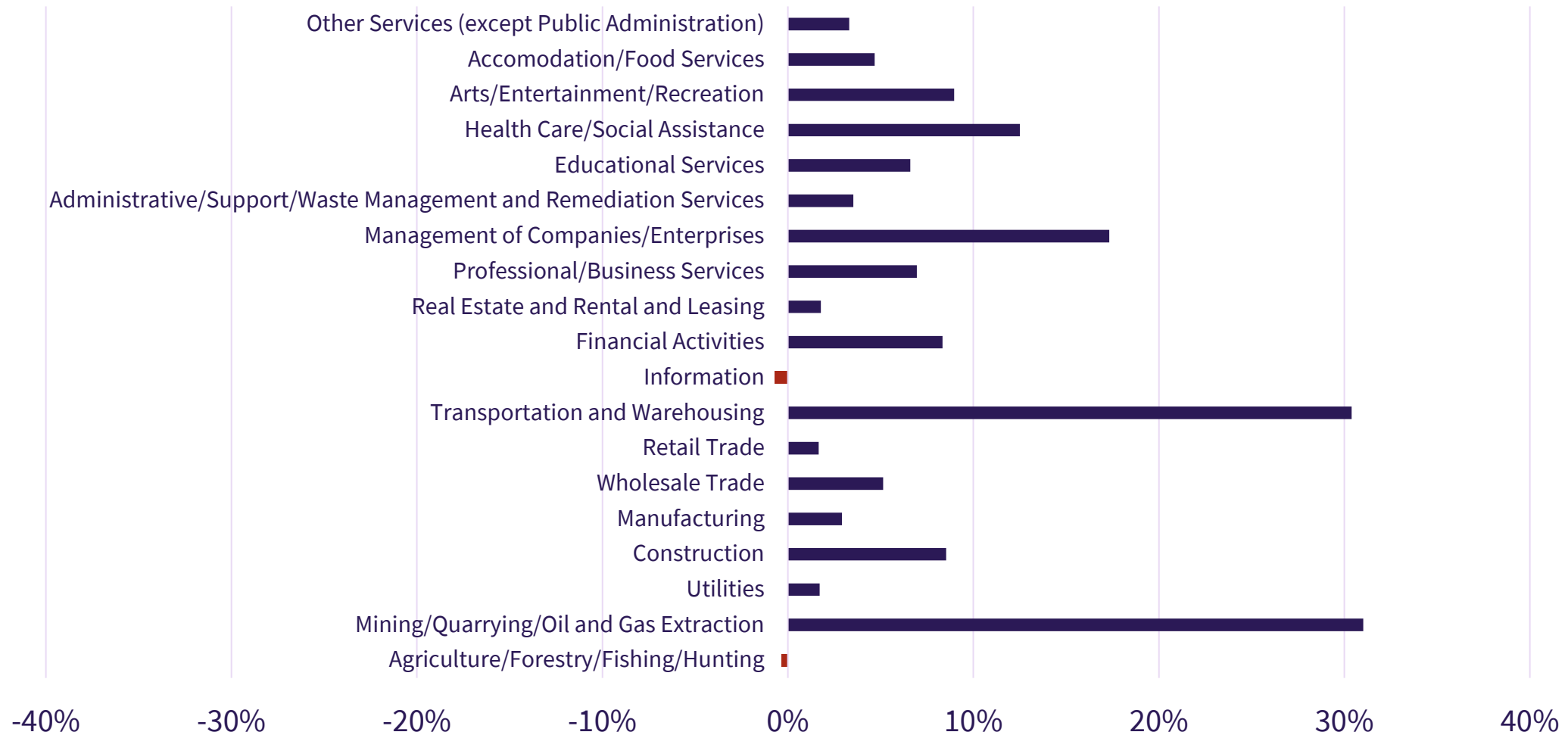


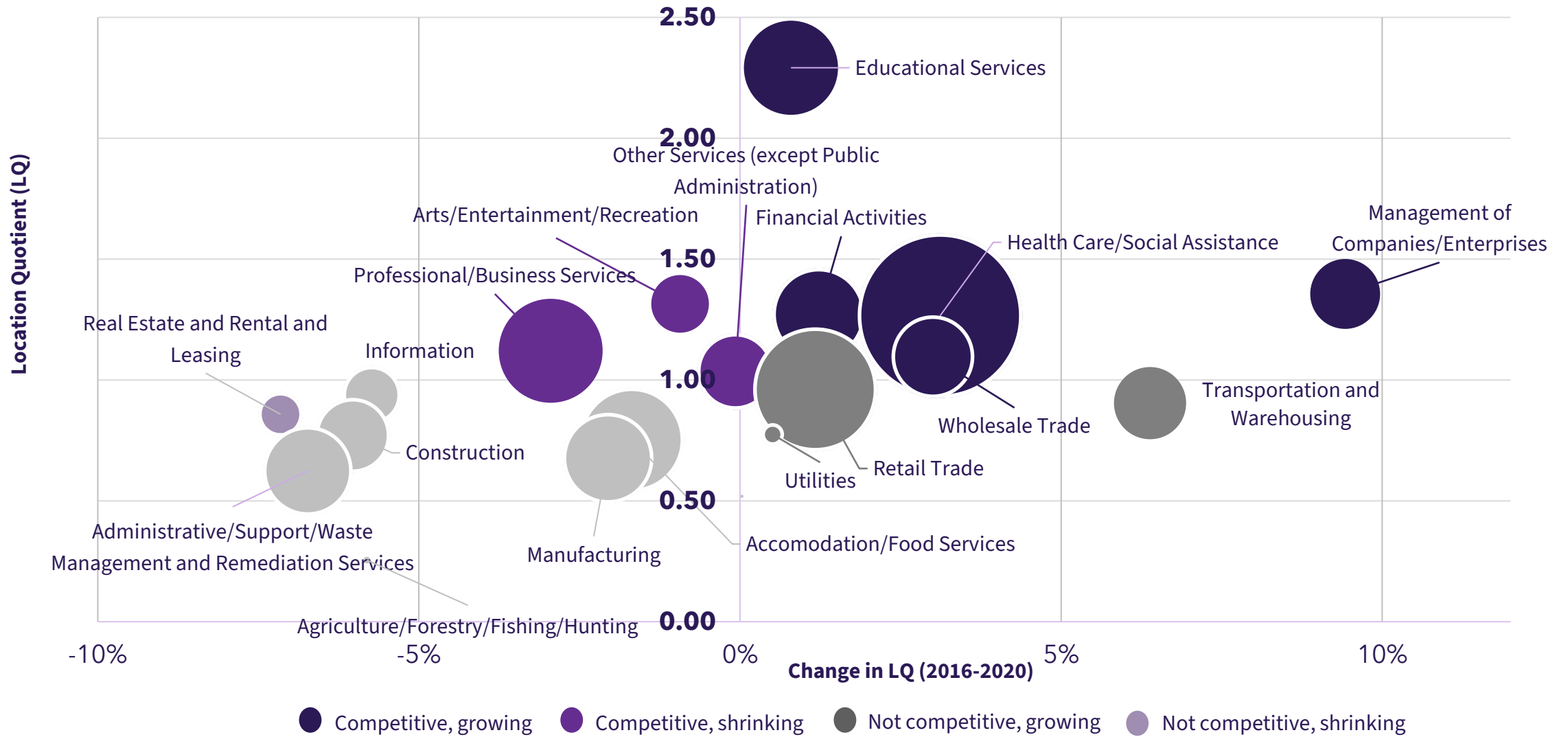
Table 20: Top Sectors by Location Quotient (LQ) (2020)

Sector	Location Quotient (LQ)
Educational Services	2.29
Management of Companies/Enterprises	1.36
Arts/Entertainment/Recreation	1.31
Financial Activities	1.27
Health Care/Social Assistance	1.27
Professional/Business Services	1.12
Wholesale Trade	1.10
Other Services (except Public Administration)	1.04
Retail Trade	0.96
Information	0.94

Table 21: Largest Location Quotient (LQ) Change (2016–2020)

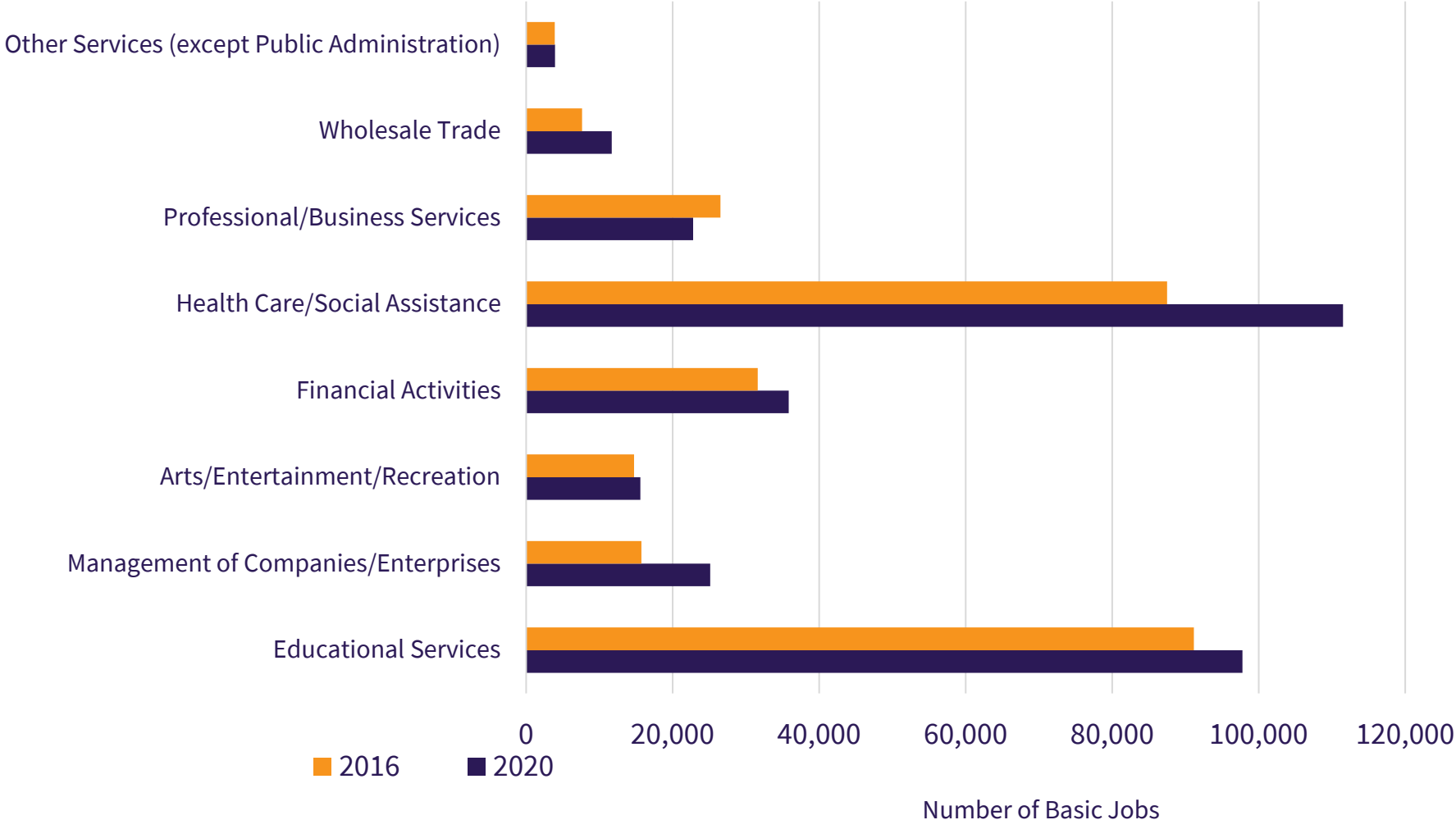
Sector	2016	2020	% Change
Mining/Quarrying/Oil and Gas Extraction	0.05	0.06	31.10%
Management of Companies/Enterprises	1.24	1.36	9.40%
Transportation and Warehousing	0.85	0.9	6.40%
Health Care/Social Assistance	1.23	1.27	3.10%
Wholesale Trade	1.06	1.1	3.00%
Information	0.99	0.94	-5.70%
Agriculture/Forestry/Fishing/Hunting	0.27	0.25	-5.80%
Construction	0.82	0.77	-6.00%
Administrative/Support/Waste Management & Remediation Services	0.67	0.62	-6.70%
Real Estate and Rental and Leasing	0.92	0.86	-7.20%

Table 22: Economic Sector Competitiveness (2020)



Data Source: County Business Patterns (2016, 2020)

Table 23: Competitive Sectors: Basic Employment (2020)



Basic employment is made up of industries that rely on external factors to fuel demand; thus, measuring demands from beyond our region.

For instance, mining, logging, and many large manufacturing companies are considered *basic* employers because their goods are shipped outside the location where they are sourced.

Data Source: County Business Patterns (2016, 2020)

Table 24: Employment, LQ, & Change in Basic Jobs (2020)

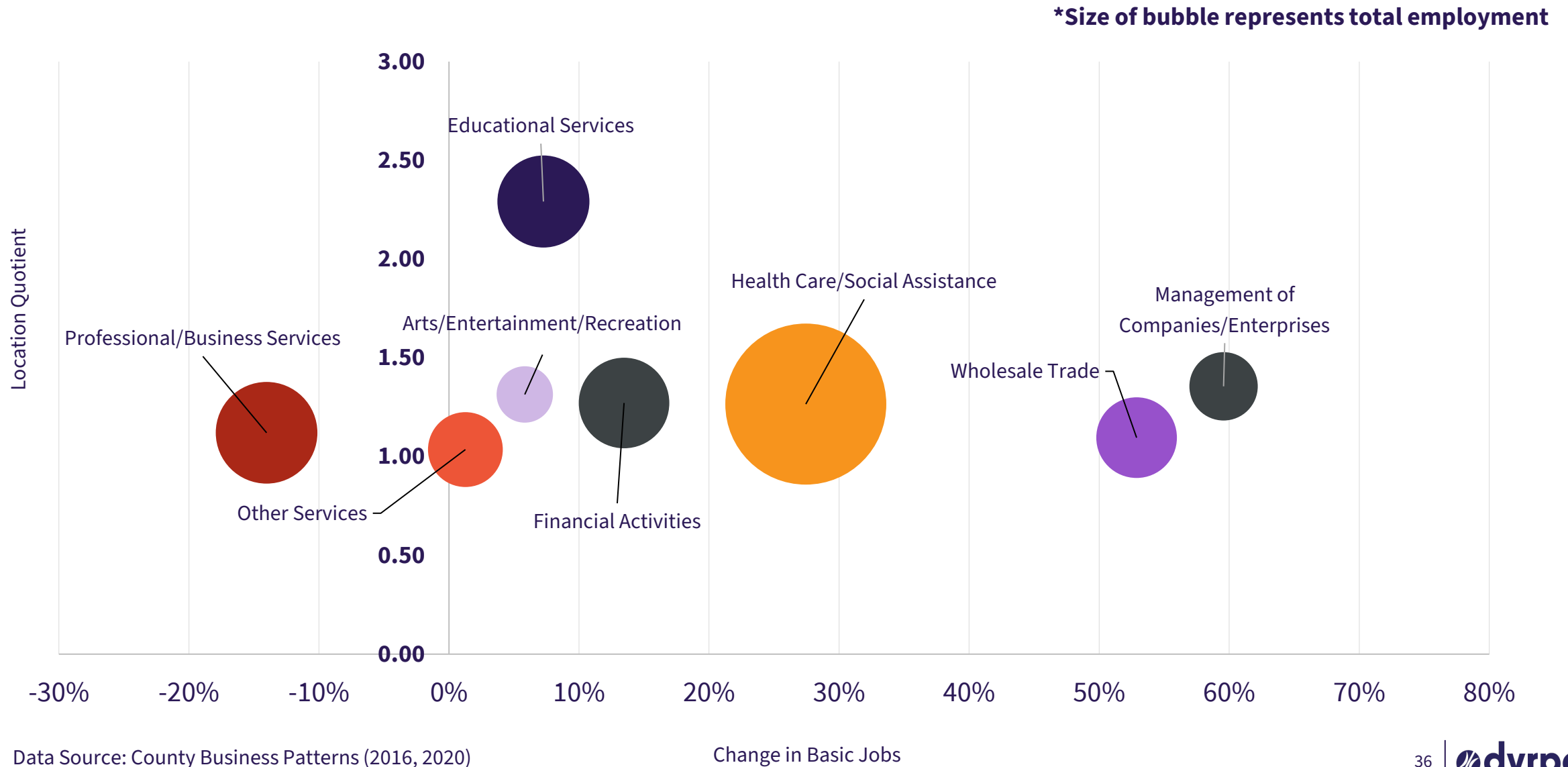


Table 25: Shift-Share Analysis: Educational Services (2020)

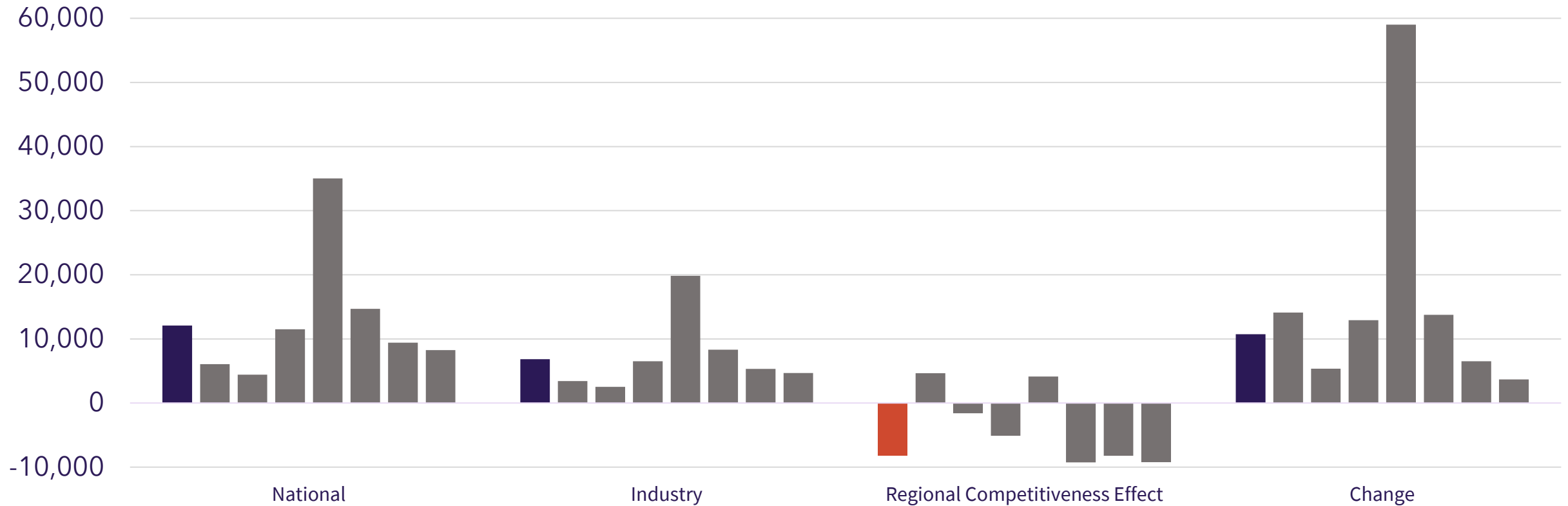
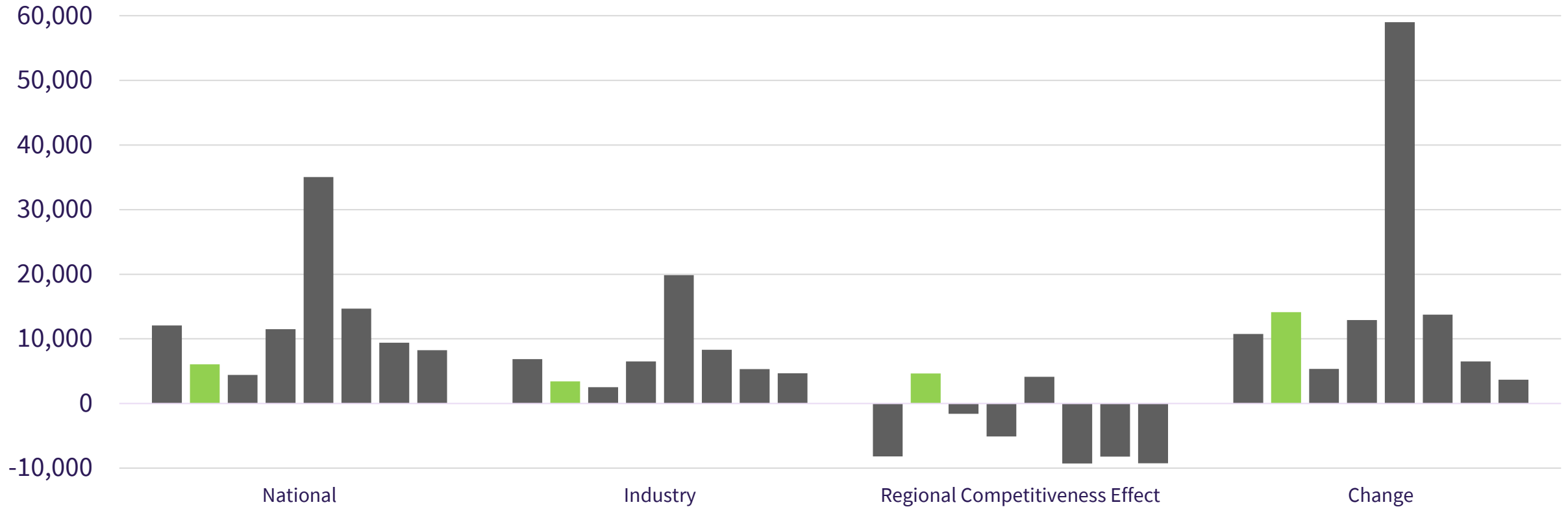


Table 26: Shift-Share Analysis: Management of Companies/Enterprises (2020)



Data Source: County Business Patterns (2016, 2020)

Table 27: Shift-Share Analysis: Arts/Entertainment/Recreation (2020)

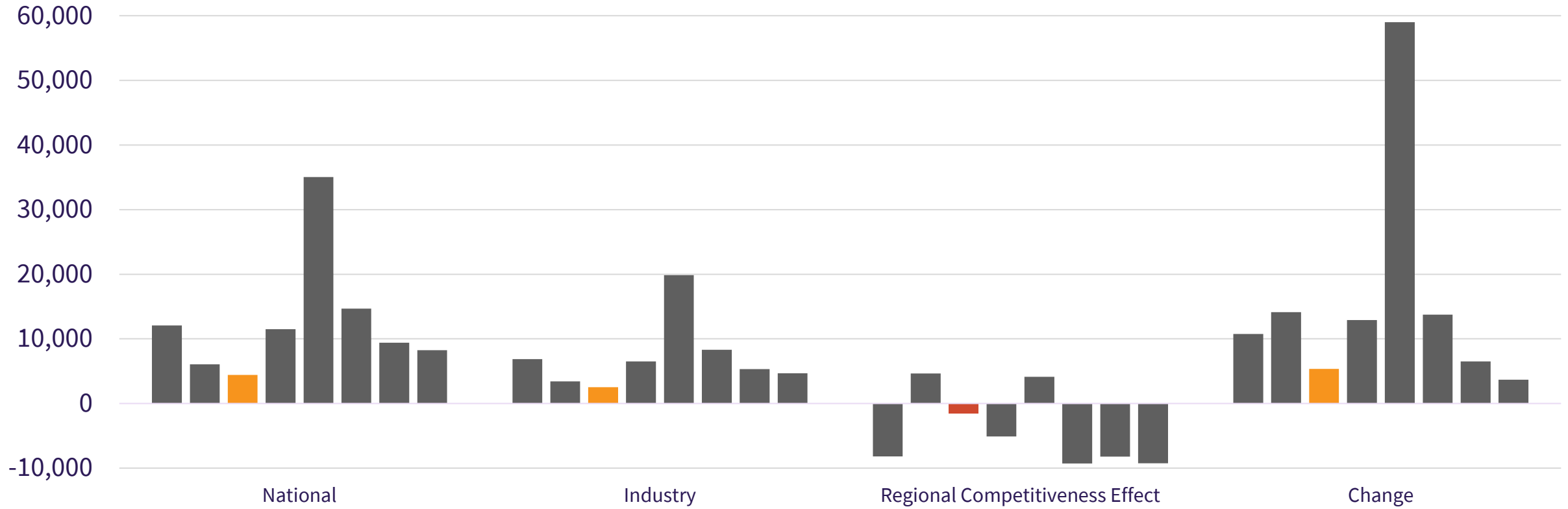


Table 28: Shift-Share Analysis: Financial Activities (2020)

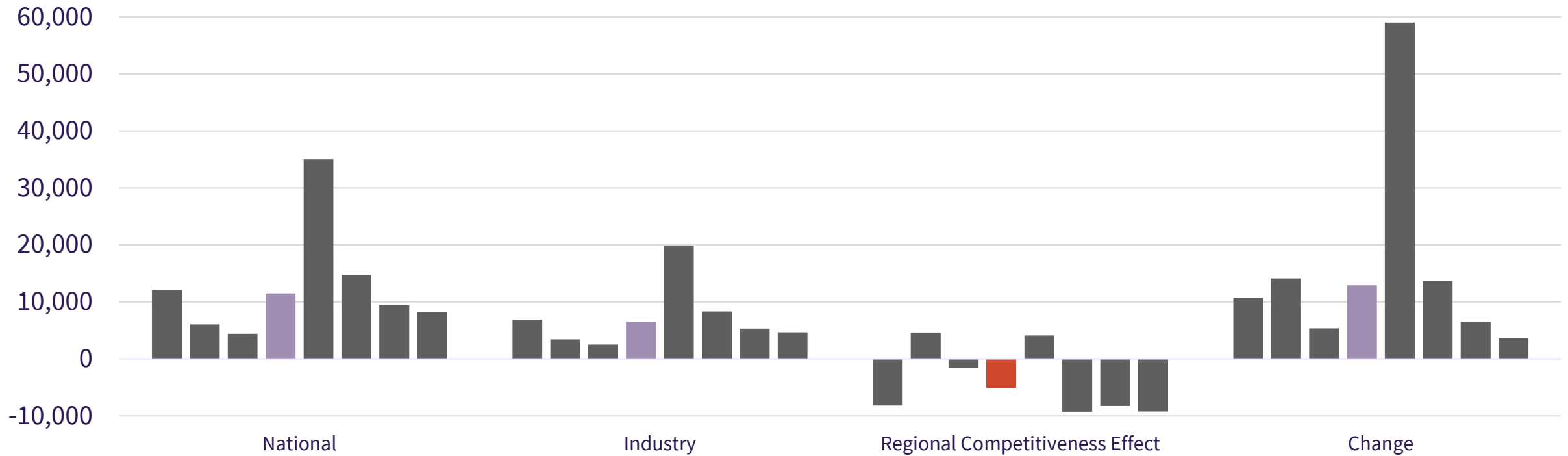
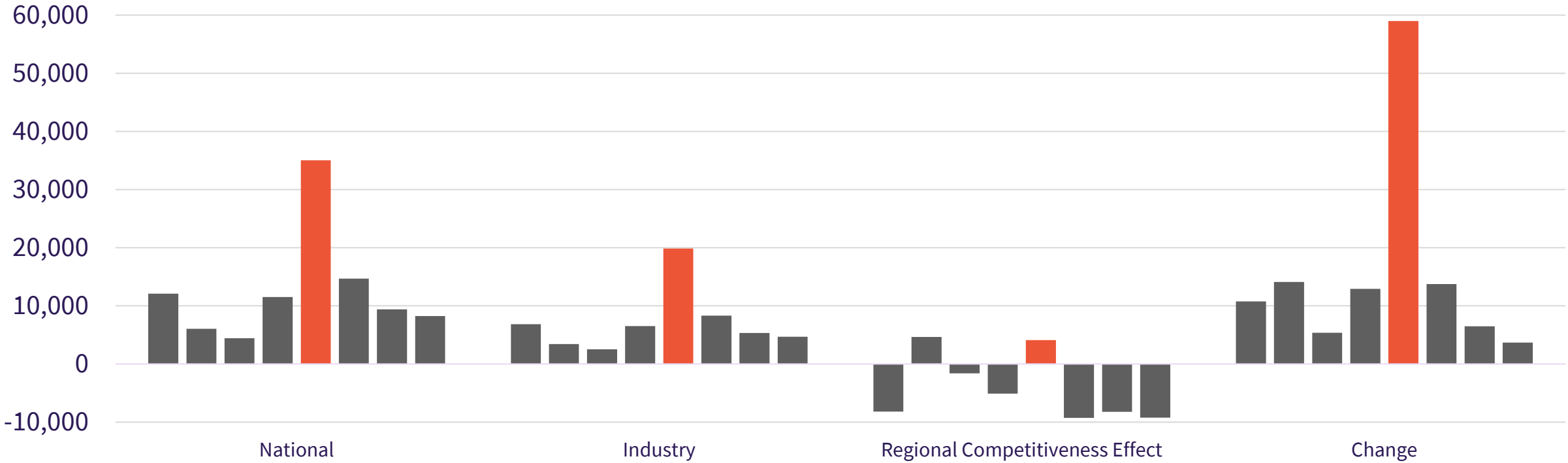


Table 29: Shift-Share Analysis: Health Care/Social Assistance (2020)



Data Source: County Business Patterns (2016, 2020)

Table 30: Shift-Share Analysis: Professional/Business Services (2020)

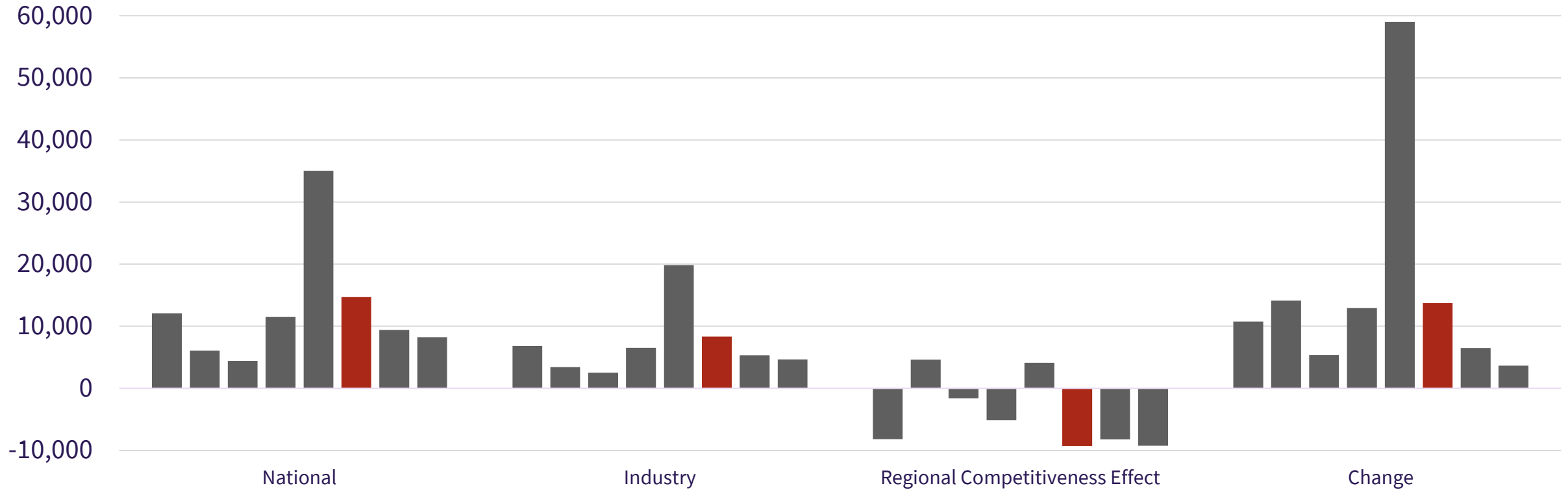


Table 31: Shift-Share Analysis: Wholesale Trade (2020)

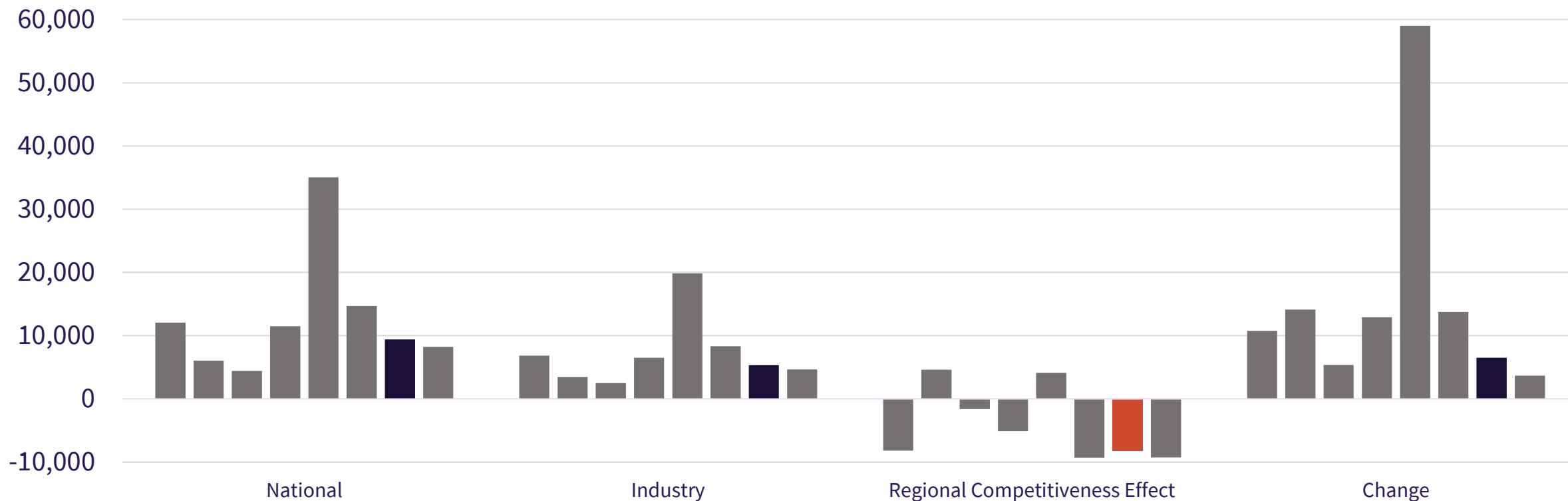
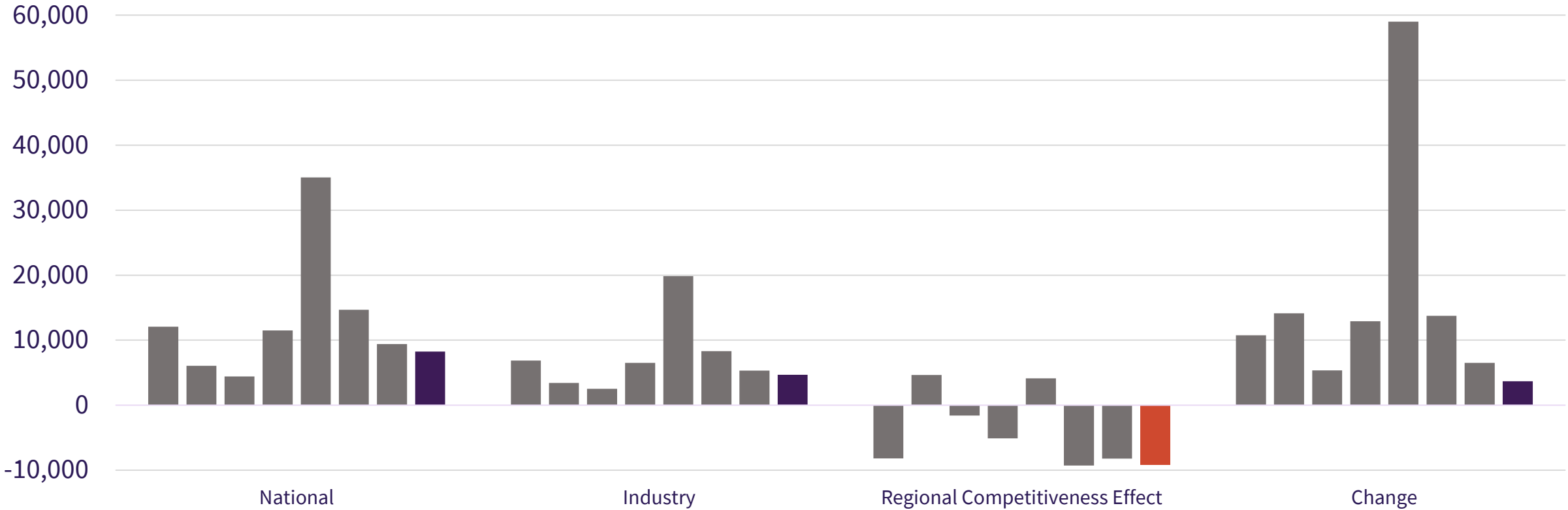
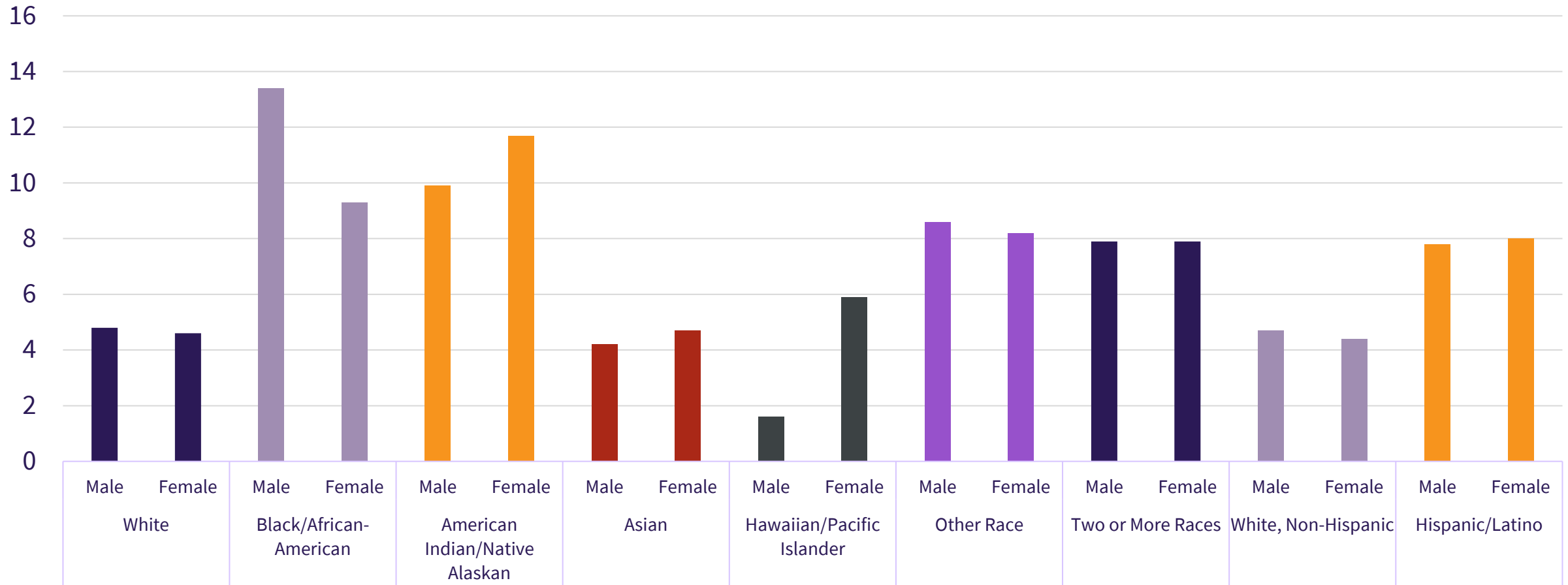


Table 32: Shift-Share Analysis: Other Services (2020)



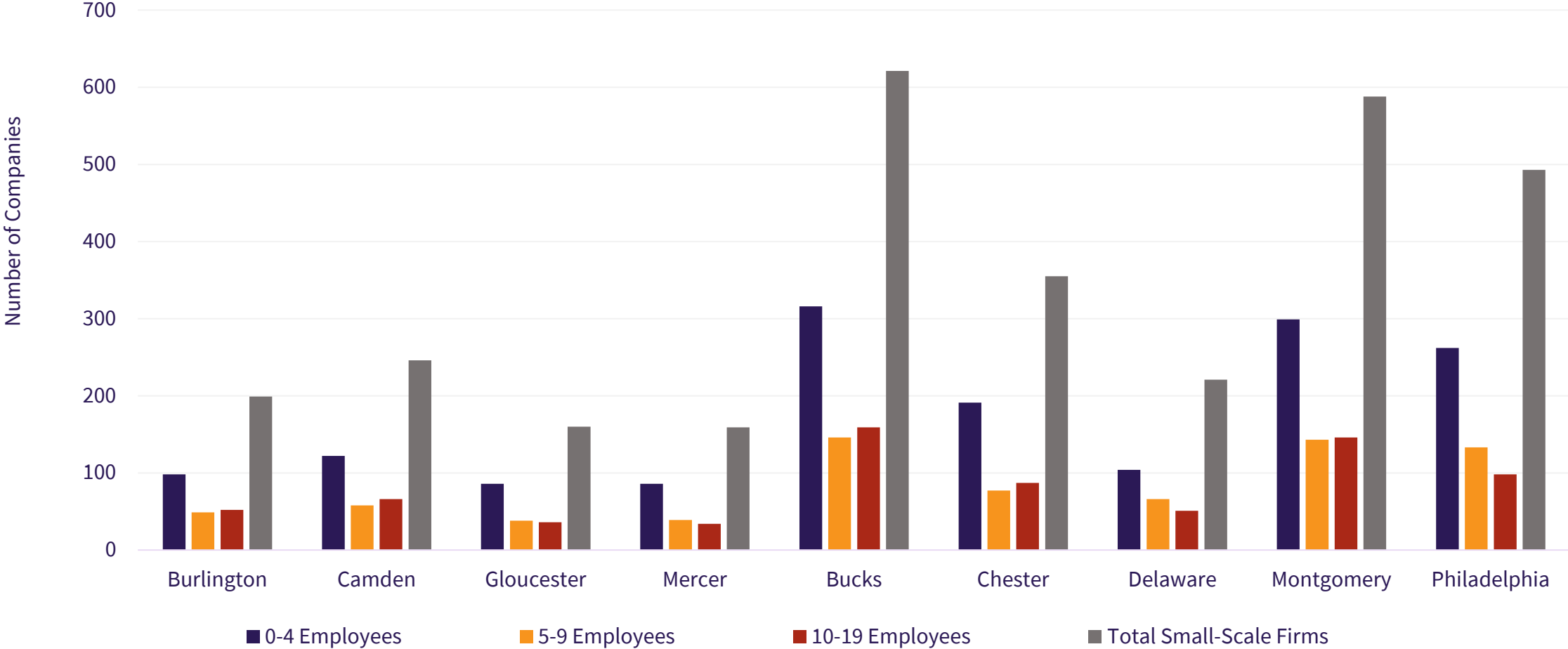
Data Source: County Business Patterns (2016, 2020)

Table 33: Unemployment Rate (2020)



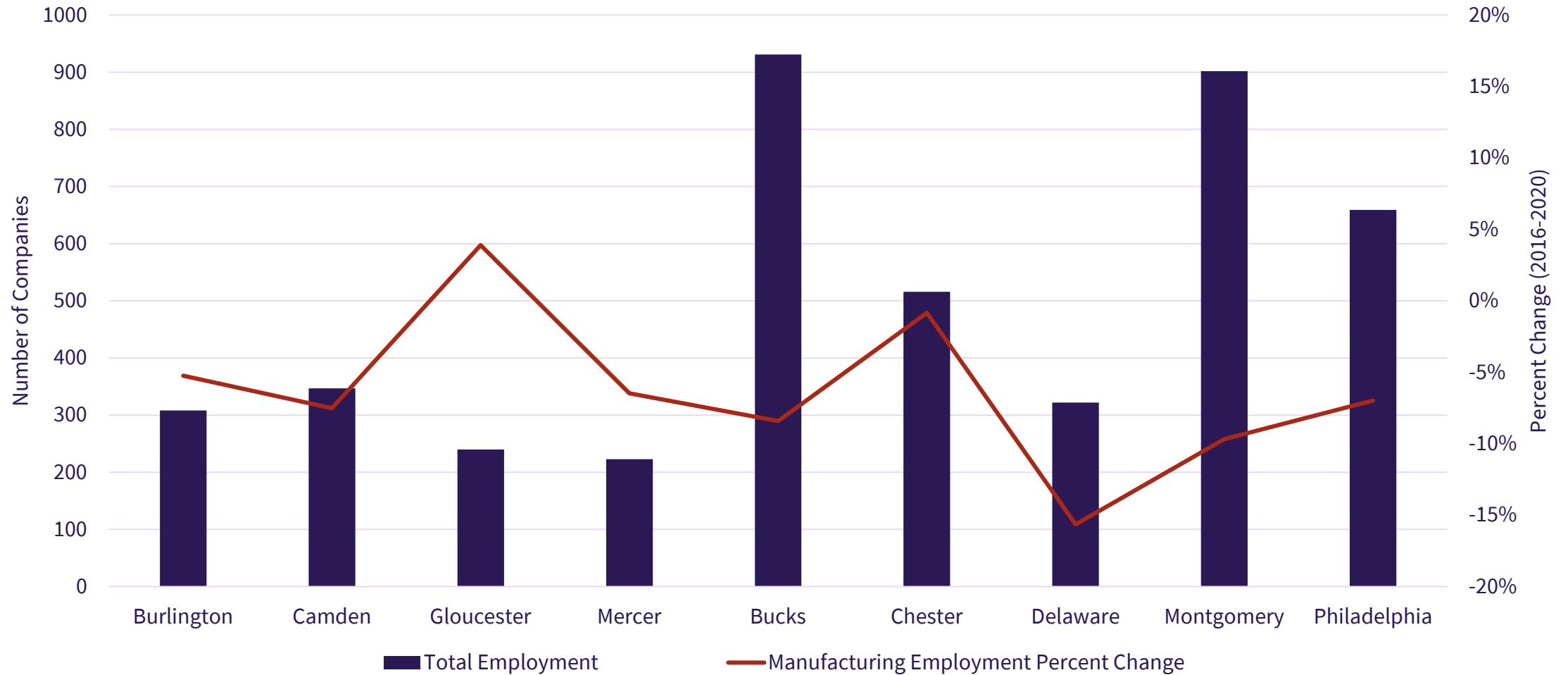
Data Source: ACS 5-Year Estimates (2016-2020)

Table 34: Small-Scale Manufacturing Employees (2020)



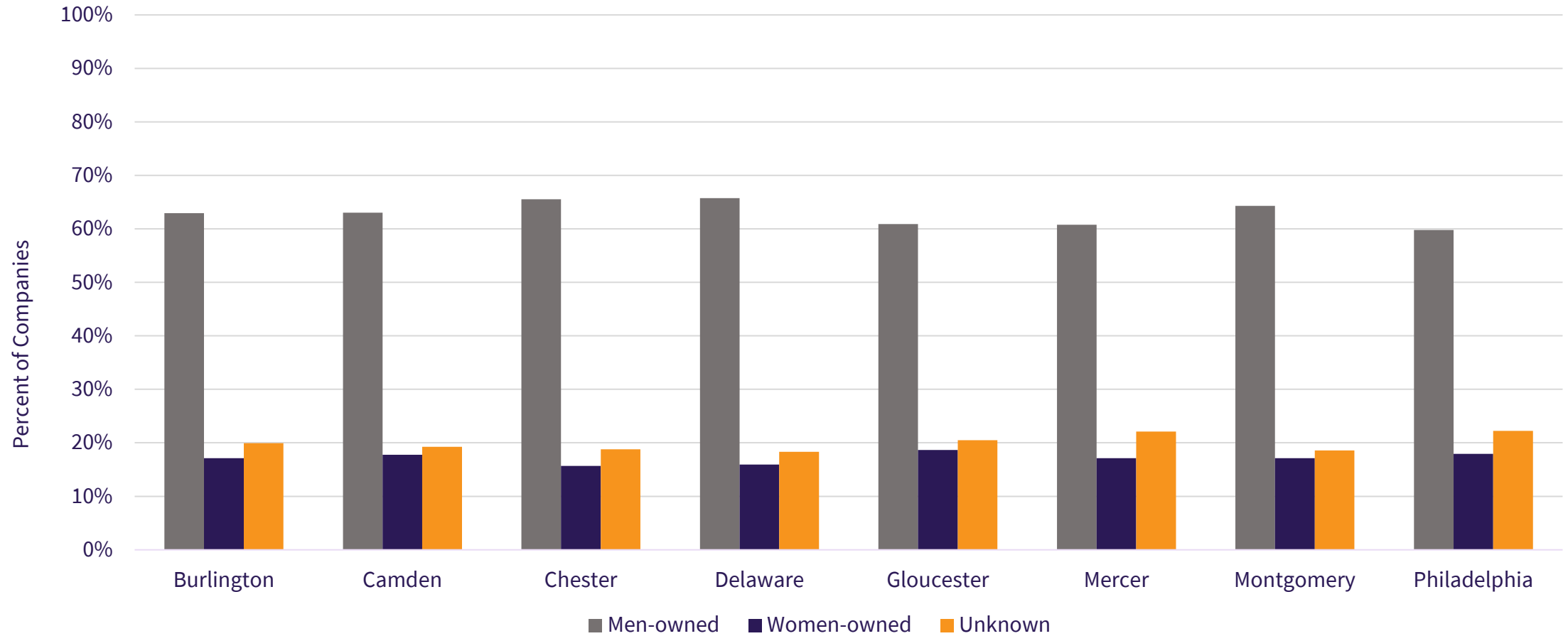
Data Source: County Business Patterns (2016, 2020)

Table 35: Change in Small-Scale Manufacturing Employment (2016–2020)



Data Source: County Business Patterns (2016, 2020)

Table 36: County Business Ownership by Gender (2017)





Chapter 2. Regional Economic Trends

Regional Economic Trends

	Lower Automation Risk	Higher Automation Risk
Higher Telework Capacity	<ul style="list-style-type: none"> • Finance & Insurance • Information • Management of Companies and Enterprise • Professional, Scientific, and Technical Services 	<ul style="list-style-type: none"> • Administrative/Support Services/Water Management and remediation Services • Real Estate and Rental and Leasing
Lower Telework Capacity	<ul style="list-style-type: none"> • Educational Services • Health and Social Assistance • Other Services • Utilities 	<ul style="list-style-type: none"> • Arts/Entertainment, and recreation • Accommodation and Food Services • Agriculture, Forestry, Fishing, and Hunting • Construction • Manufacturing • Mining, Quarrying, and Oil and Gas Extraction • Retail Trade • Transportation and Warehousing • Wholesale Trade

The rapid advancement of digital technologies is reshaping where and how work is performed (telework), as well as how goods and services are produced and delivered (automation). The extent to which telework and automation can be adopted varies widely across occupations and industries. To capture these differences, *Growing Greater Philadelphia* highlights the region’s key economic sectors and evaluates each in terms of automation risk and telework capacity. (Shown in the matrix)

The following slides outline the methodology used to determine these measures and explore how ongoing digitization may affect the regional economy and its workforce.

Determining Telework Capacity & Automation Risk

Telework Capacity

Released in November 2022, the U.S. Bureau of Labor Statistics' (BLS) Occupational Requirements Survey (ORS) provides estimates on a range of requirements at the occupational level. Each requirement falls within one of seven categories: physical demands, environmental conditions, education, training, and experience, as well as cognitive and mental requirements.

Due to gaps in the ORS, the BLS' Business Response Survey (BRS) was used to determine telework capacity at the sector-level. However, since the BRS defines telework capacity as establishments with employees teleworking either all the time, some of the time, and or rarely or never, the following formula was developed to quantify telework capacity:

*Telework Score = ((Percent of establishments with employees teleworking all the time * 10) + (Percent of establishments with employees teleworking some of the time * 5) + (Percent of establishments with employees teleworking rarely or never * 1))/1000*

Automation Risk

The Oxford Martin School's publication, *The Future of Employment*, sought to quantify the degree to which specific occupations are susceptible to computerization. The analysis was done utilizing data from the U.S. Department of Labor's online platform, O*NET Resource Center. Sector-level risk was calculated by determining the occupational employment composition of each sector and then multiplying each occupation's automation risk by its percentage of total employment within each subsector. The values were then summed to calculate its automation risk by sector.

Telework Capacity

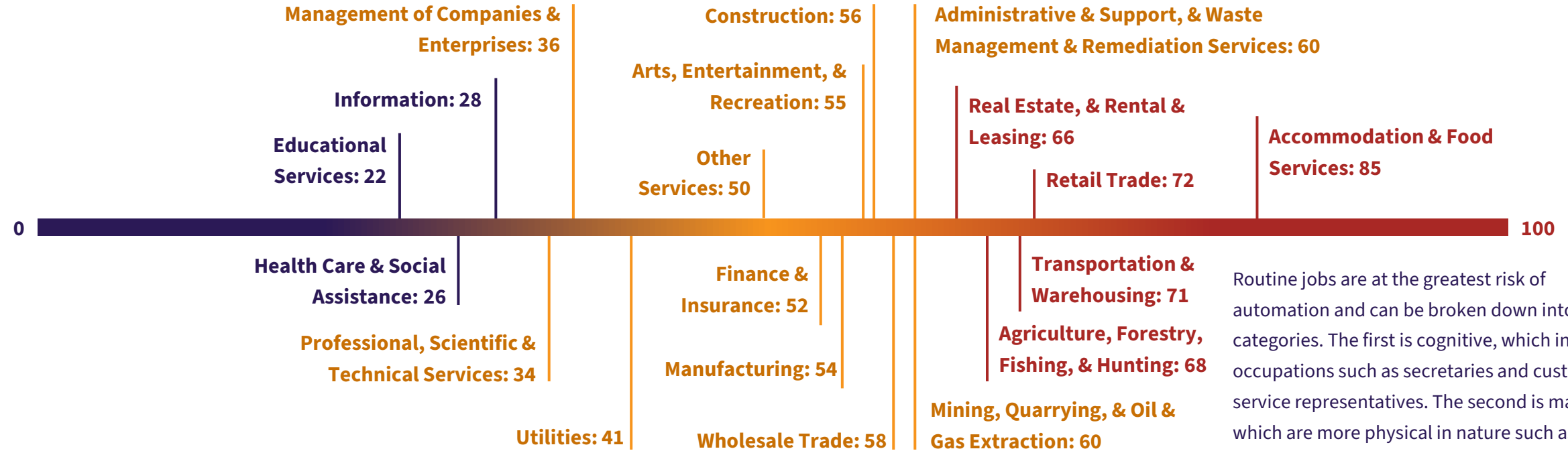
Scores by Sector



Increased telework capacity and opportunities mean that employers now have access to a national, or even global, talent pool. This also means that workers are no longer constrained by the job market in their city, or the housing market in the city in which their job is located. However, telework capacity is greater in some sectors of the economy than others, meaning some occupations are still tethered to the physical location of their job. Shown is the automation capacity scores for the region's top economic sectors.

Automation Risk

Scores by Sector

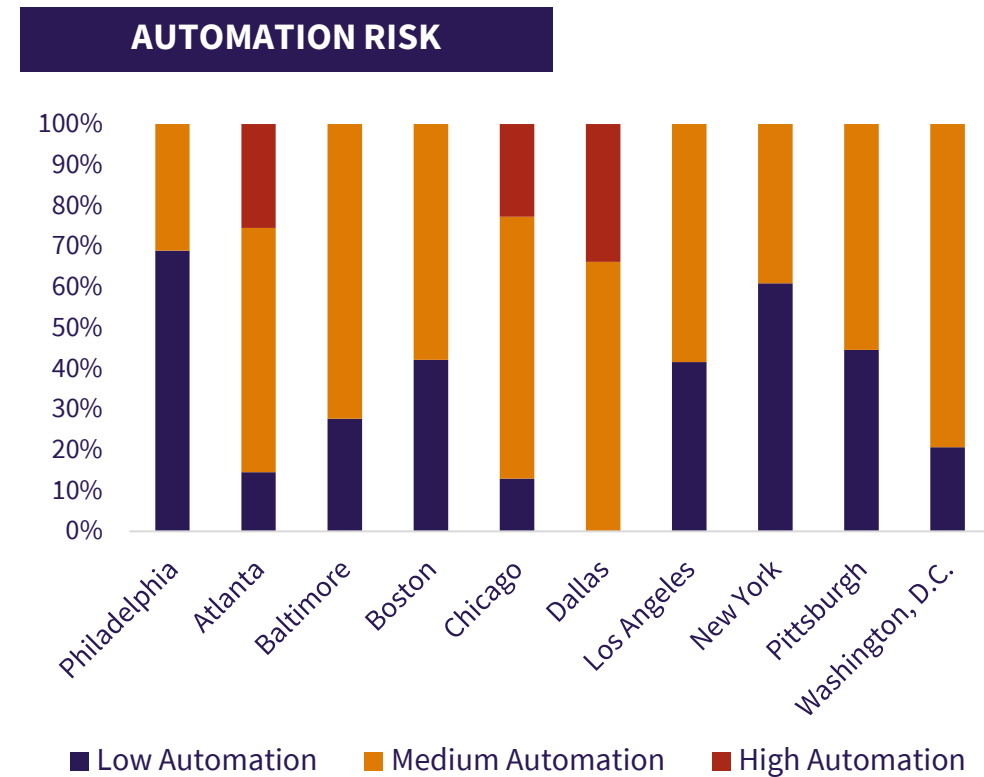
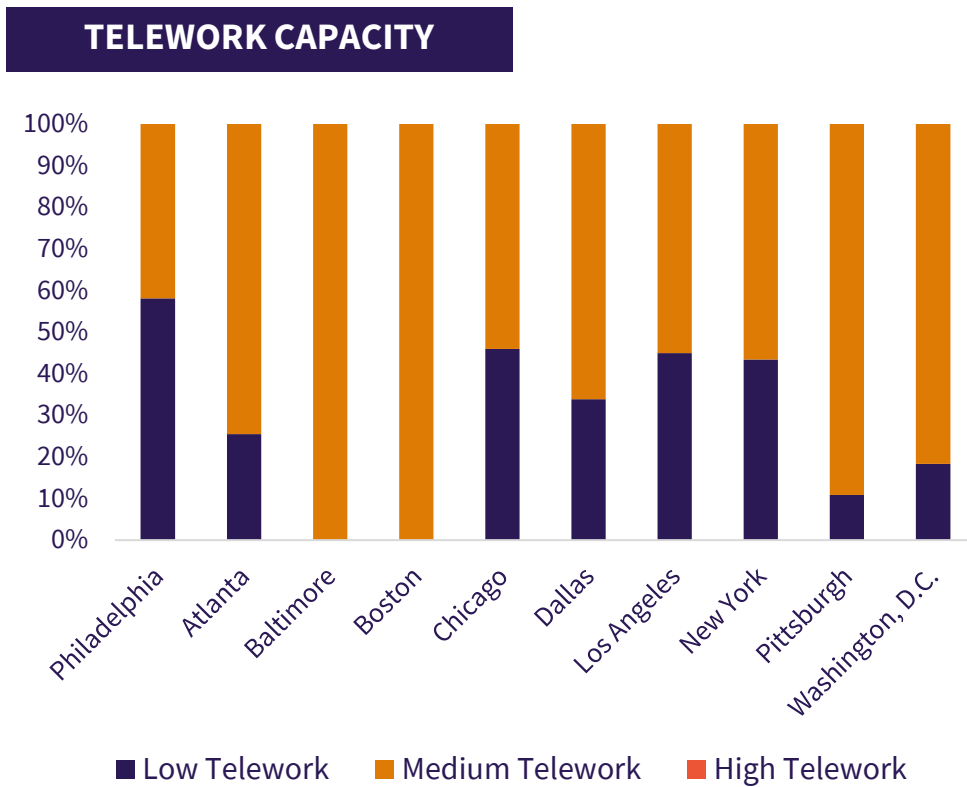


Routine jobs are at the greatest risk of automation and can be broken down into two categories. The first is cognitive, which includes occupations such as secretaries and customer service representatives. The second is manual, which are more physical in nature such as a factory worker. Both types can be found throughout each sector at varying degrees. As a result, the workforces in some sectors are at greater risk of automation than others. Shown is the automation risk for the top economic sectors in Greater Philadelphia.

Regional Comparisons

Competitive Sector Employment as Share of Total Employment

Regional economies built upon sectors with higher Telework Capacity will need to adopt policies aimed at talent retention and quality of life improvements. Conversely, regions where economies are more reliant on sectors with greater Automation Risk will more likely face challenges related to the reskilling and upskilling of a displaced workforce. DVRPC's Rating the Region dashboard provides a deeper analysis of these trends by sector and region.



Regionally Competitive Sectors

Scores by Sector

Greater Philadelphia's most competitive sectors (based on LQ) are outlined below. Those that are competitive and growing are highlighted in **dark purple**. Those that are regionally-competitive are highlighted in **light purple**. Those in which the region is not competitive, but the sector is growing are highlighted in **red**. The Telework Capacity and Automation Risk scores for each sector, and for the top three occupations within each of these sectors, are detailed in the slides that follow to better anticipate the future implications of digitalization for Greater Philadelphia's economy.

COMPETITIVE

Educational Services

Arts, Entertainment, & Recreation

Finance & Insurance

REGIONALLY COMPETITIVE

Management of Companies &

Enterprises

Health Care & Social Assistance

NOT COMPETITIVE - GROWING

Retail

Transportation & Warehousing

Utilities

Total Employment: 152,823
Share of Regional Employment: 6.15%

TOP OCCUPATIONS

Telework
Capacity

22

Automation
Risk

35

1. Elementary School Teachers, Except Special Education

Total Regional Employment: 27,340
Annual Mean Wage: \$71,390

Telework
Capacity

00

Automation
Risk

00

2. Secondary School Teachers, Except Special and Career / Technical Education

Total Regional Employment: 27,240
Annual Mean Wage: \$74,380

Telework
Capacity

N/A

Automation
Risk

01

3. Teaching Assistants, Except Postsecondary

Total Regional Employment: 26,370
Annual Mean Wage: \$28,650

Telework
Capacity

00

Automation
Risk

N/A

Total Employment: 89,087
Share of Regional Employment: 3.58%

TOP OCCUPATIONS

1. General and Operations Managers

Total Regional Employment: 58,980
Annual Mean Wage: \$143,140

Telework Capacity: **26**
Automation Risk: **01**

2. Customer Service Representative

Total Regional Employment: 57,530
Annual Mean Wage: \$44,170

Telework Capacity: **21**
Automation Risk: **55**

3. Accountants and Auditors

Total Regional Employment: 32,580
Annual Mean Wage: \$87,000

Telework Capacity: **45**
Automation Risk: **94**

Telework Capacity

36

Automation Risk

35

Total Employment: 47,419
Share of Regional Employment: 1.91%

TOP OCCUPATIONS

1. Amusement and Recreation Attendants

Total Regional Employment: 6,720
Annual Mean Wage: \$26,510

Telework Capacity: **00**
Automation Risk: **72**

2. Exercise Trainers and Group Fitness Instructors

Total Regional Employment: 5,750
Annual Mean Wage: \$47,140

Telework Capacity: **N/A**
Automation Risk: **09**

3. Landscaping and Groundskeeping Workers

Total Regional Employment: 18,580
Annual Mean Wage: \$38,910

Telework Capacity: **00**
Automation Risk: **95**

Telework Capacity

52

Automation Risk

22

Total Employment: 515,666

Share of Regional Employment: 20.75%

TOP OCCUPATIONS

1. Home Health and Personal Care Aides

Total Regional Employment: 112,040
Annual Mean Wage: \$26,220

Telework Capacity: **00**
Automation Risk: **39**

2. Registered Nurses

Total Regional Employment: 73,350
Annual Mean Wage: \$87,830

Telework Capacity: **03**
Automation Risk: **01**

3. Nursing Assistants

Total Regional Employment: 34,110
Annual Mean Wage: \$31,670

Telework Capacity: **00**
Automation Risk: **N/A**

Telework Capacity

26

Automation Risk

26

Total Employment: 164,624
Share of Regional Employment: 6.62%

TOP OCCUPATIONS

1. Customer Service Representative

Total Regional Employment: 57,530
Annual Mean Wage: \$44,170

Telework Capacity	Automation Risk
21	55

2. Insurance Sales Agents

Total Regional Employment: 8,260
Annual Mean Wage: \$80,770

Telework Capacity	Automation Risk
35	92

3. Securities, Commodities, and Financial Services Sales Agents

Total Regional Employment: 13,840
Annual Mean Wage: \$87,710

Telework Capacity	Automation Risk
N/A	02

Telework Capacity

52

Automation Risk

35

Total Employment: 287,058
Share of Regional Employment: 11.55%

TOP OCCUPATIONS

1. Retail Salesperson

Total Regional Employment: 68,930
Annual Mean Wage: \$30,810

Telework Capacity: **01**
Automation Risk: **92**

2. Cashiers

Total Regional Employment: 61,460
Annual Mean Wage: \$27,840

Telework Capacity: **00**
Automation Risk: **97**

3. Stockers and Order Fillers

Total Regional Employment: 51,490
Annual Mean Wage: \$34,780

Telework Capacity: **00**
Automation Risk: **N/A**

Telework Capacity

18

Automation Risk

72

Total Employment: 101,293
Share of Regional Employment: 4.08%

TOP OCCUPATIONS

1. Heavy and Tractor-Trailer Truck Drivers

Total Regional Employment: 33,270
Annual Mean Wage: \$57,000

Telework Capacity: **00**
Automation Risk: **79**

2. Laborers, and Freight, Stock, and Material Movers, Hand

Total Regional Employment: 59,600
Annual Mean Wage: \$39,560

Telework Capacity: **00**
Automation Risk: **85**

3. Light Truck Drivers

Total Regional Employment: 21,000
Annual Mean Wage: \$46,570

Telework Capacity: **00**
Automation Risk: **69**

Telework Capacity

22

Automation Risk

71

Total Employment: 9,686

Share of Regional Employment: 0.39%

TOP OCCUPATIONS

1. Electrical Power-Line Installers and Repairers

Total Regional Employment: 1,400
Annual Mean Wage: \$93,690

Telework
Capacity

00

Automation
Risk

01

2. Customer Service Representative

Total Regional Employment: 57,530
Annual Mean Wage: \$44,170

Telework
Capacity

21

Automation
Risk

55

**Telework
Capacity**

27

**Automation
Risk**

41

3. Power Plant Operators

Total Regional Employment: 360
Annual Mean Wage: \$96,570

Telework
Capacity

N/A

Automation
Risk

85

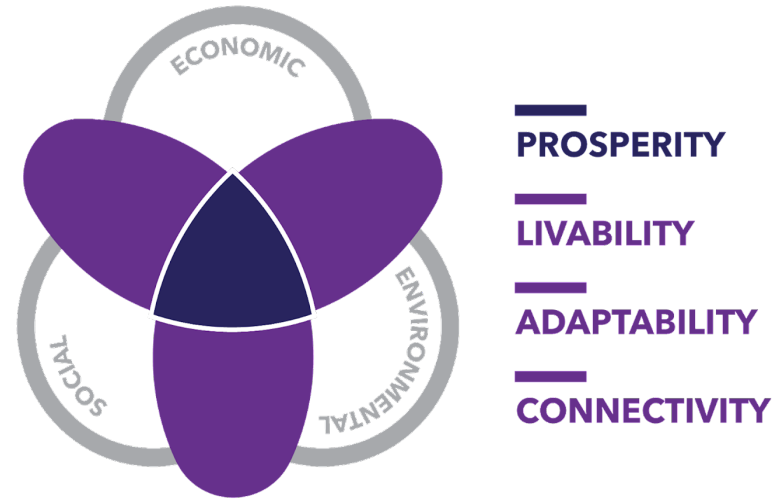


Chapter 3. Strategic Framework

Strategic Framework Focus Areas

Greater Philadelphia is a large and complex region, covering portions of two states, with hundreds of municipalities responsible for individual development decisions. The region's economy is similarly diverse and multifaceted, with dozens of public- and private-sector organizations seeking to promote or attract a wide variety of sectors or specific interests. Thus, there is no single process or simple strategy that will fully address the opportunities and challenges that the region faces.

Although each county and municipality approaches the economic development process differently, they are united in advancing common goals: investing in their people, creating attractive places, and supporting businesses. Continued coordination across state lines, municipal and county lines, employment sectors, and the public and private sectors is essential to maintain a broad regional perspective and to create a thriving region.



Growing Greater Philadelphia focuses on the intersection of community and economic development in the following areas: Prosperity, Livability, Adaptability, and Connectivity. Within each focus area, there is a goal statement with strategies, and performance metrics are listed.

Focus Area: Prosperity

Residents and businesses have access to the educational, technological, and capital resources needed for financial and economic mobility.

Metrics:

Annual Wage Growth, Educational Attainment, Technology-Based Occupations, Number of Job/Skills Training Programs, Employment Growth, Research and Development Investments, Exports/Imports, Regional Startups

Regional Strategies



1. Foster a regulatory ecosystem that supports the cultivation of a diverse and local entrepreneurial talent pool.
2. Support the region's innovation districts and PROPEL Tech Hub, while seeking research and development investments to enable creativity and economic diversification.
3. Equip the regional workforce with the relevant skills needed to be able to adapt to advancements in production and distribution.

Focus Area: Livability

Quality of life improvements lead to talent and resident and business retention and greater reliability in workforce productivity.

Metrics:

Net migration, number of community farms/buy local programs, tourism visitation, tourism-related jobs, historic protected properties, arts/culture venues, housing units, tax credits in use, housing and transportation index, brown/greyfield sites.

Regional Strategies



- ✓ Employ placemaking initiatives that leverage and enhance the region's unique identity, natural environment, and cultural amenities.
- ✓ Support the development of a variety of housing types to preserve regional affordability and meet the needs of a wider range of households.
- ✓ Pursue opportunities to assess and clean up contaminated properties throughout the region.
- ✓ Promote primary prevention strategies and healthy built environments as ways to reduce healthcare needs.

Focus Area: Adaptability

The region remains economically competitive while anticipating and mitigating the adverse impacts of weather events and global forces.

Metrics:

Number of regional unhealthy days, acres of open space, LEED buildings, flood insurance claims, clean economy industry employment, emissions by industry, home fuel heating sources, air and water quality data

Regional Strategies



- ✓ Diversify economic sectors to reduce the impacts of future economic downturns, regardless of causality.
- ✓ Prevent future development patterns from encroaching into ecologically sensitive and agriculturally productive areas.
- ✓ Invest in adaptation and enhance resilience in the natural and built environment, including the relocation of at-risk structures.

Focus Area: Connectivity

Residents and businesses have enhanced access to regional, national, and global economies.

Metrics:

Broadband density, broadband providers, investments in public infrastructure, transportation industry jobs, port investments, electric vehicle investments, home weatherization investments, home electrification investments, solar installments, foreign investment, air passengers, air freight, port tonnage

Regional Strategies



- ✓ Expand and adopt new telecommunications infrastructure and technologies.
- ✓ Support multimodal transportation investments to improve job access, quality housing, and education.
- ✓ Modernize the region's freight infrastructure to increase supply chain efficiencies and connectivity.
- ✓ Support the transition to an efficient and electric based economy.



Chapter 4. Economic Resilience

Preparing for Economic Shocks

A resilient economy is one that can withstand an initial economic shock, recover quickly from a shock, and avoid the shock altogether. It involves the protection of and physical recovery of damaged infrastructure and the creation of support systems for businesses as they work to recover and return to full productivity.

Disruptions to the economic base of a region are generally caused by one or more of three occurrences:

- a downturn or significant event in the national economy that impacts demand for locally produced goods and consumer spending;
- a downturn in particular industries that are critical components of the region's economic activity; and/or
- an external event, natural or manmade disaster, the closure of one or more military bases, or the loss of a major employer.

Resilience Initiatives

To establish resilience, either locally or regionally, stakeholders need to anticipate potential risk, evaluate how that risk can impact key economic assets, and build a response.

Resilience initiatives fall into two categories: steady-state (long-term) and responsive (short-term). In the event of disruption of the region's economy, it is important that specific roles and responsibilities are assigned to regional economic development practitioners and organizations such as acting as the focal point for coordination, distributing timely information, leading injury responses, and acting as the grant administrator for federally funded recovery projects.

Steady-State Resilience Initiatives

Steady-state resilience initiatives focus on long-term efforts to bolster the ability to withstand or avoid a shock. As weather events increase, the frequency, severity, and extent of disasters, community planning and development is critical.

Proactive investments at the local level such as creating flexible land use policies, ensuring public sector and private sector capabilities and partnerships, and engaging the entire community in making decisions about the future can help mitigate potential economic losses from an economic shock.



Integrating larger planning efforts (e.g., hazard mitigation plans) and funding sources into local comprehensive plans and regulatory documents.



Maintaining municipal business licenses, tax information, and other business establishment databases with GIS and other digital tools.



Measuring redundancy in telecommunications and broadband networks to protect commerce and public safety in the event of natural or manmade disasters.



Employing safe development practices such as locating structures outside of floodplains, preserving natural lands that act as buffers from storms, and protecting downtowns from the impacts of extreme weather.



Conducting vulnerability assessments to understand at-risk populations should a weather event take place.

Responsive Initiatives

Responsive initiatives focus on short-term actions to increase capacity to respond and recover from a shock. Established communication networks and information collection protocols can speed up a region's response and increase effectiveness. Agencies listed below can assist with regional responses.

Business Emergency Operation Centers serve as a hub of business-to-business collaboration and communication.

Small Business Development Centers (SBDC) provide small business owners a variety of free business consulting and low-cost training services.

Workforce Investment Boards provide opportunities to retrain workers to meet the evolving needs of the region's emergency employers.

Transportation/Incident Management Groups provide a forum for regional partners to work together.



Defining key stakeholders, roles, responsibilities, and key actions.



Adopting a process for regular communication, monitoring, and updating of business community needs and issues to be used after an incident.



Identifying key local, regional, state, and federal officials to lead communication for business needs and coordinate assessment efforts.



Requiring business succession plans for short-, intermediate-, and long-term recovery needs.

Table 38: Natural Hazard Risks by County

	Flooding	Drought	Wildfire	Extreme Weather	Water Quality	Transportation Related	Health Pandemic	Environmental Hazards
Bucks	○	○		○		○	○	
Burlington	○	○	○	○			○	○
Camden	○	○	○	○			○	○
Chester	○				○		○	
Delaware	○			○		○	○	○
Gloucester							○	
Mercer	○	○		○			○	○
Montgomery	○	○		○		○	○	
Philadelphia	○			○			○	○

The Federal Emergency Management Agency (FEMA) and EDA are helping local and regional partners identify opportunities to align their process to better anticipate and mitigate natural and economic shocks.. The factors listed in the corresponding table were identified through each county’s Hazard Mitigation Plan as those with a moderate-high risk of occurrence. The following slides illustrate potential disasters and show a mix of steady-state and responsive actions that may be undertaken.

Closure of Major Employer Scenario

This scenario assumes the temporary or permanent closure of an employer that comprises a large percentage of local jobs.

IMPACT

- ✓ Increase in unemployment rate and needed assistance
- ✓ Decreased local spending
- ✓ Greater need for social and emotional support services
- ✓ Potential home foreclosure and rental payment delinquencies

PREPARATION

- ✓ Create business retention and expansion plans to determine employer needs and concerns
- ✓ Develop an effective talent supply and retraining pipelines

RECOVERY STEPS

- ✓ Determine if employees' rights were violated by employer
- ✓ Determine if the employer is eligible for reduced reporting requirements or other allowances to government agencies
- ✓ Help laid-off employees to file initial application for unemployment benefits
- ✓ Initiate Trade Adjustment Act (U.S. Department of Labor) support services, including training, job search, and relocation allowances (if applicable)

RESOURCES

- ✓ PA Department of Labor and Industry Rapid Response
- ✓ PA Worker Adjustment and Retraining Notification (WARN)
- ✓ NJ Worker Adjustment and Retraining Notification (WARN)
- ✓ NJ Department of Labor and Workforce Development

Public Health Event Scenario

Public health events can be short or long-term, but either is able to cause significant disruptions in everyday tasks and workforce capacity, ultimately threatening the viability of a business.

IMPACT

- ✓ Long-term illness and loss of life
- ✓ Increased health care costs and associated burdens
- ✓ Severe pressure on healthcare system, utilization, and capacity
- ✓ Workforce shortages
- ✓ Business slowdowns and closures
- ✓ Changes to built environment to accommodate protective measures
- ✓ Increased regulatory and code enforcement burdens

PREPARATION

- ✓ Ensure public health support with adequate personnel levels and necessary programs
- ✓ Confirm an Incident Response Framework is in place and plan for public health events
- ✓ Build up reserves of materials such as face masks, vaccines, ventilators, and other equipment for future health emergencies.

RECOVERY STEPS

- ✓ Follow state and federal protocols for immediate incident response
- ✓ Share accurate information with the public
- ✓ Take prescribed action to prevent spread of disease, if applicable
- ✓ Follow guidelines for public quarantines and business shutdowns
- ✓ Work with officials to get necessary supplies to those in need

RESOURCES

- ✓ PA Health Alert Network
- ✓ NJ Health Services Portal
- ✓ CDC-Emergency Preparedness and Response
- ✓ Public Health Emergency Response Teams (PHERST)
- ✓ PA Department of Health
- ✓ NJ Department of Health

Catastrophic Flooding Scenario

This scenario assumes an unprecedented rainfall floods hundreds or thousands of acres of homes, infrastructure, and businesses.

IMPACT

- ✓ Long-term illness and loss of life
- ✓ Damage/destruction of housing would exacerbate existing shortages
- ✓ Damage /destruction of office, commercial, and industrial facilities would adversely impact economic growth
- ✓ Damage/ destruction of natural and man-made tourism amenities could affect visitation rates
- ✓ Road drainage systems may not be adequate to handle increased runoff, debris, and sediment during and after

PREPARATION

- ✓ Conduct home and business assessments to determine flood potential
- ✓ Coordinate outreach to residents, landlords, and businesses to procure necessary flood insurance policies, as necessary and available
- ✓ Develop and update coordinated response plans

RECOVERY STEPS

- ✓ Identify temporary shelter, food, medicine, and other pressing resident issues
- ✓ Assess damage to homes and businesses to determine safety
- ✓ Identify special clean up benefits for residents/businesses
- ✓ Identify technical assistance and funding to rebuild property and inventories
- ✓ Work with government agencies to apply and secure funding

RESOURCES

- ✓ Federal Emergency Management Agency (FEMA)
- ✓ Health and Human Services Office of the Assistant Secretary for Preparedness and Response (ASPR)
- ✓ ASPR-Technical Resources Assistance Center and Information Exchange (TRACIE)
- ✓ PA Emergency Management Agency (PEMA)
- ✓ NJ Mitigation Assistance
- ✓ American Institute of Architects Hazard Mitigation Resources

Wildfire Scenario

This scenario assumes an uncontrolled fire destroys hundreds or thousands of acres of forest land, homes, infrastructure.

IMPACT

- ✓ Damage or destruction of housing would exacerbate existing shortages
- ✓ Damage or destruction of office, commercial, and industrial buildings and facilities would adversely impact economic growth
- ✓ Damage or destruction of natural and man-made tourism amenities could affect visitation rates
- ✓ Wildfire can result in soil erosion that limits regrowth potential
- ✓ Road drainage systems may not be adequate to handle increased runoff, debris, and sediment after a fire

PREPARATION

- ✓ Conduct home and business assessments to determine levels of fire safety
- ✓ Work with US Forest Service to ensure all proactive measures are taken to prevent against the spread and impact of fire, including soil erosion control measures
- ✓ Coordinate outreach to residents, landlords, and businesses to procure necessary fire insurance policies, as necessary and available
- ✓ Develop and update coordinated response plans in case of fire emergency

RECOVERY STEPS

- ✓ Identify temporary shelter, food and other pressing resident issues
- ✓ Assess damage to homes and businesses to determine if they are safe to reenter
- ✓ Assess natural and manmade resources to determine the extent of damage and estimated recovery time and cost
- ✓ Assist landowners with reforestation, replanting and other resource conservation practices
- ✓ Work with businesses to identify technical assistance and funding

RESOURCES

- ✓ PA Department of Conservation and Natural Resources
- ✓ NJ Forest Fire Service
- ✓ U.S. Fire Administration
- ✓ National Fire Protection Association (NFPA)
- ✓ Red Cross
- ✓ SmokeyBear.com
- ✓ Ready.gov
- ✓ Wildland Fires (U.S.D.A.)



Chapter 5. Report Summary

Report Summary

Greater Philadelphia is a large and complex region, covering portions of two states, with hundreds of municipalities responsible for individual development decisions. The region's economy is similarly diverse and multifaceted, with dozens of public and private economic development organizations, each seeking to promote or attract a wide variety of sectors or specific interests. Thus, there is no single process or simple strategy that will fully address all the opportunities and challenges that the region faces. Although each county and city approaches the economic development process differently, they are united in advancing common goals around four focus areas:

- Prosperity
- Livability
- Adaptability
- Connectivity

Continued coordination across state lines, across city and county lines, across employment sectors, and across the public and private sectors is essential to maintaining a broad regional perspective and identifying and working toward a common vision. Greater Philadelphia presents tremendous potential for continued economic growth. Over the next five years, DVRPC will manage the regional CEDS and coordinate ongoing economic development efforts and prepare and submit annual reviews as required by EDA. Working closely with the Economic Development Committee and economic development partners, the CEDS strategies for achieving the region's goals will continue to be promoted and performance measures will be refined and analyzed.

Data Sources

Slides 5-47

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U.S. Census Bureau, American Community Survey (ACS), 5-Year Estimates (2011-2015) (2016-2020)

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Delaware County Hazard Mitigation Plan, 2016

Gloucester County Hazard Mitigation Plan, 2021

Montgomery County Hazard Mitigation Plan, 2017

Philadelphia Hazard Mitigation Plan, 2022

Abstract

Title of Report

Growing Greater Philadelphia: FY 2024-2028 Comprehensive Economic Development Strategy

Publication Number: 24108

Date Published: September 2024

Geographic Area Covered: DVRPC Nine-County Region

Key Words:

Comprehensive Economic Development Strategy (CEDS), U.S. Economic Development Administration (EDA), economy, employment, economic clusters, performance measures, economic resilience, regional assessment, economic sectors

Abstract:

This report was created to provide the required five-year update to Greater Philadelphia's Regional Comprehensive Economic Development Strategy (CEDS). The report includes background demographic, economic, and land use data; identifies regional strengths, weaknesses, opportunities, and threats; discusses economic resilience; identifies regional economic development goals, and strategies; and identifies potential performance measures. The regional CEDS was developed under the guidance of a Review Committee that includes representatives of the county planning and economic development agencies, regional economic development organizations, educational institutions, and the private sector.

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Vision

A Greater Philadelphia region that provides:

- A safe, modern, multimodal **transportation** network for all
- An innovative and connected **economy** with opportunity and shared prosperity
- Healthy, walkable, and vibrant **communities**
- A preserved and restored natural **environment** with thriving ecological systems
- Clean, reliable, and affordable **infrastructure and utility services** resilient to the effects of extreme weather

Mission

As the Metropolitan Planning Organization (MPO) for Greater Philadelphia, the Delaware Valley Regional Planning Commission (DVRPC) builds consensus for a shared regional vision; enables data-based, community-centered solutions; and helps put plans into action.



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