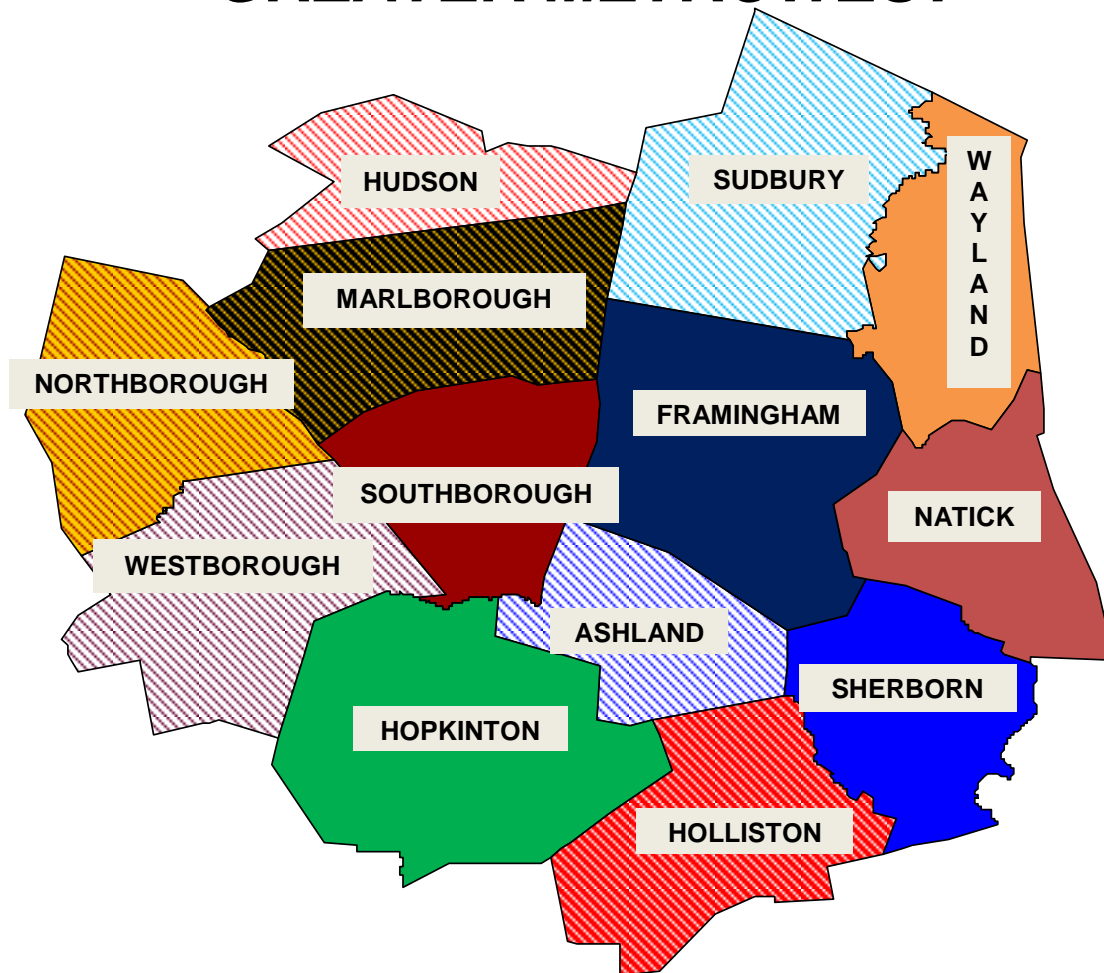


MERC

LABOR FORCE STUDY

GREATER METROWEST



By: Marcella Bentes, B.S. 2015
Christina Padovano, B.S. 2015
Professor Martha Meaney
with assistance from Herbert Kyles, B.S. 2014

SPRING 2015



Framingham

State University

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METROWEST ECONOMIC RESEARCH CENTER

Framingham State University
Towers Hall, 100 State Street
Framingham, MA 01701-9101
508-626-4033 FAX: 508-626-4018
www.merc-online.org

MERC Co-Directors:

Donald MacRitchie, M.A.
Martha Meaney, M.A.

MERC Executive Board:

Maureen Dunne, M.B.A.
Donald MacRitchie, M.A.
Martha Meaney, M.A.
Fahlino Sjuib, Ph.D.

GREATER METROWEST LABOR FORCE STUDY 2015

Population, household and labor force characteristics play a major role in business location and economic analysis. The MetroWest Economic Research Center (MERC) on the campus of Framingham State University conducted a labor force study of Greater MetroWest, a sub-state economy located between Worcester and Boston. Greater MetroWest, an aggregate of two of MERC's smaller regions, MetroWest and Greater Marlborough, is comprised of the following thirteen Massachusetts communities: Ashland, Framingham, Holliston, Hopkinton, Hudson, Marlborough, Natick, Northborough, Sherborn, Southborough, Sudbury, Wayland and Westborough. MERC researchers have previously demonstrated that the Greater MetroWest region has a distinct economic profile, different from the state or Greater Boston.

Using data from the U. S. Census Bureau, Census 2000, 2010 and the American Community Survey 2009-13, and from the Massachusetts Executive Office of Labor and Workforce Development, MERC's Greater MetroWest Labor Force Study 2015 provides a detailed description and analysis of several resident population characteristics including: educational attainment, labor force participation rates and median household income in comparison to the Commonwealth of Massachusetts and the United States averages. These demographics describe the composition of Greater MetroWest residents and households and provide relevant and necessary data for businesses and municipalities in the region.

This study provides households and businesses with descriptive economic information to understand their municipality and provides city and town officials with relevant data to help make informed choices.

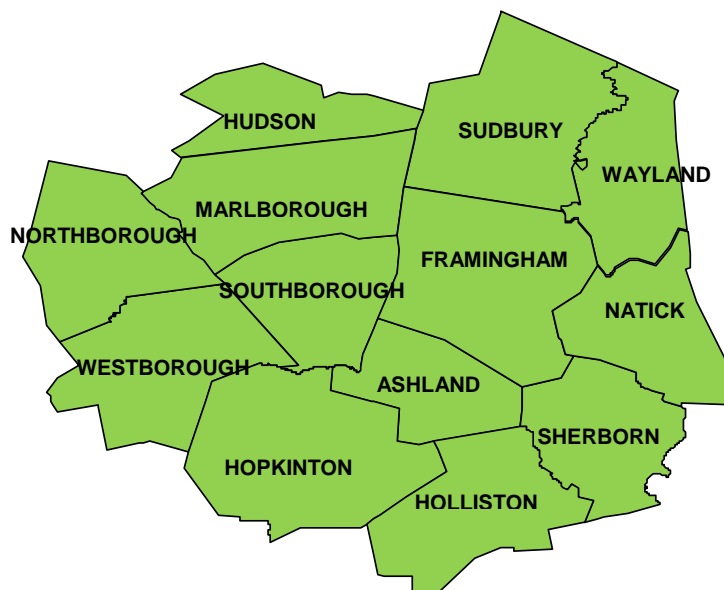


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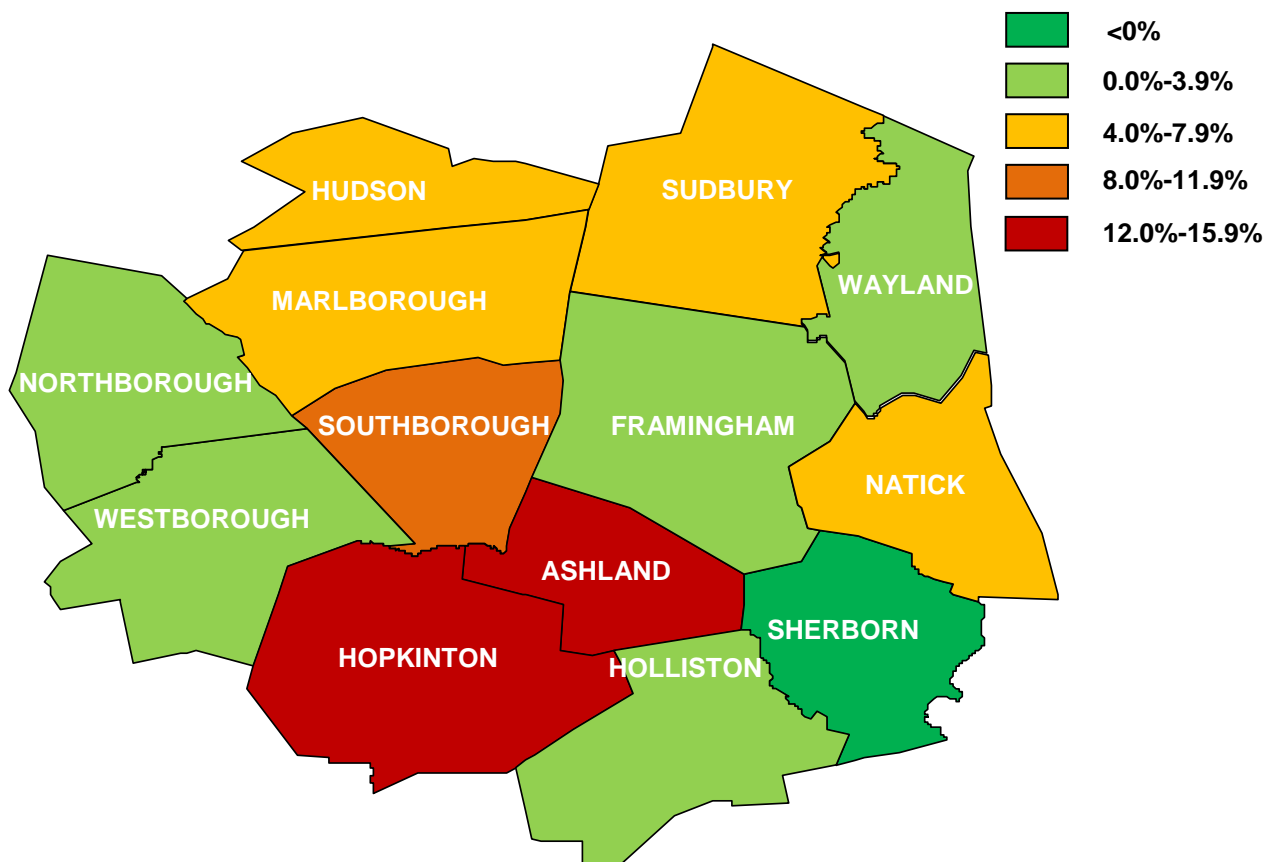
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GREATER METROWEST – POPULATION CHARACTERISTICS

POPULATION CHARACTERISTICS

The Greater MetroWest (GMW) population is 284,865 individuals. This estimate was gathered using the American Community Survey (ACS) estimates for 2009 to 2013. Framingham accounts for 24% of the regional population, while Marlborough comprised 14%. Natick made up 12%, and together, these 3 communities totaled 50% of GMW's population. The other ten towns each comprised between 1.5% and 6.8% of the total. The region is generally less racially and ethnically diverse than the state and nation. However, a greater portion of the region's population is Asian than in the state or the nation. The region's population is well educated. About 55% of the region's individuals over 25 years old hold a bachelor's degree or higher. Meanwhile, almost 25% hold a graduate or professional degree. The next six pages describe these results in greater detail.

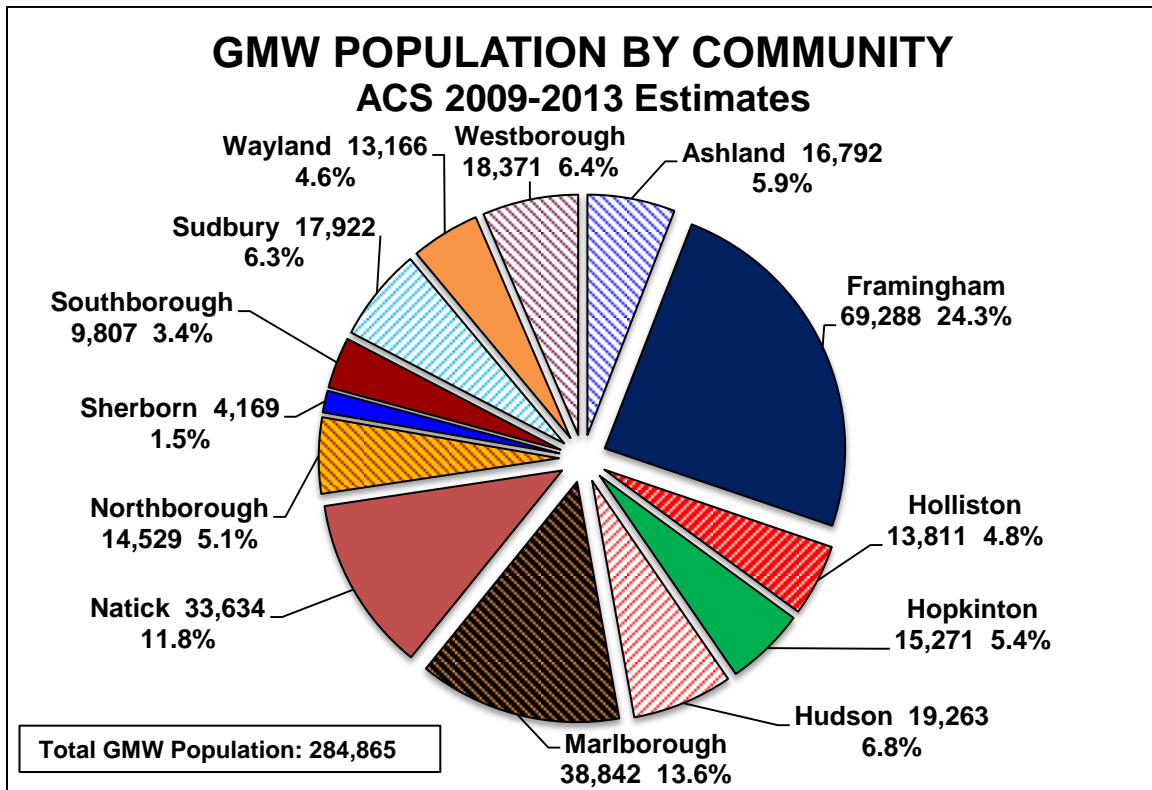
GREATER METROWEST POPULATION GROWTH 2000 TO 2013



Source: Census 2000, ACS 2009-2013 and MERC



GREATER METROWEST – POPULATION CHARACTERISTICS

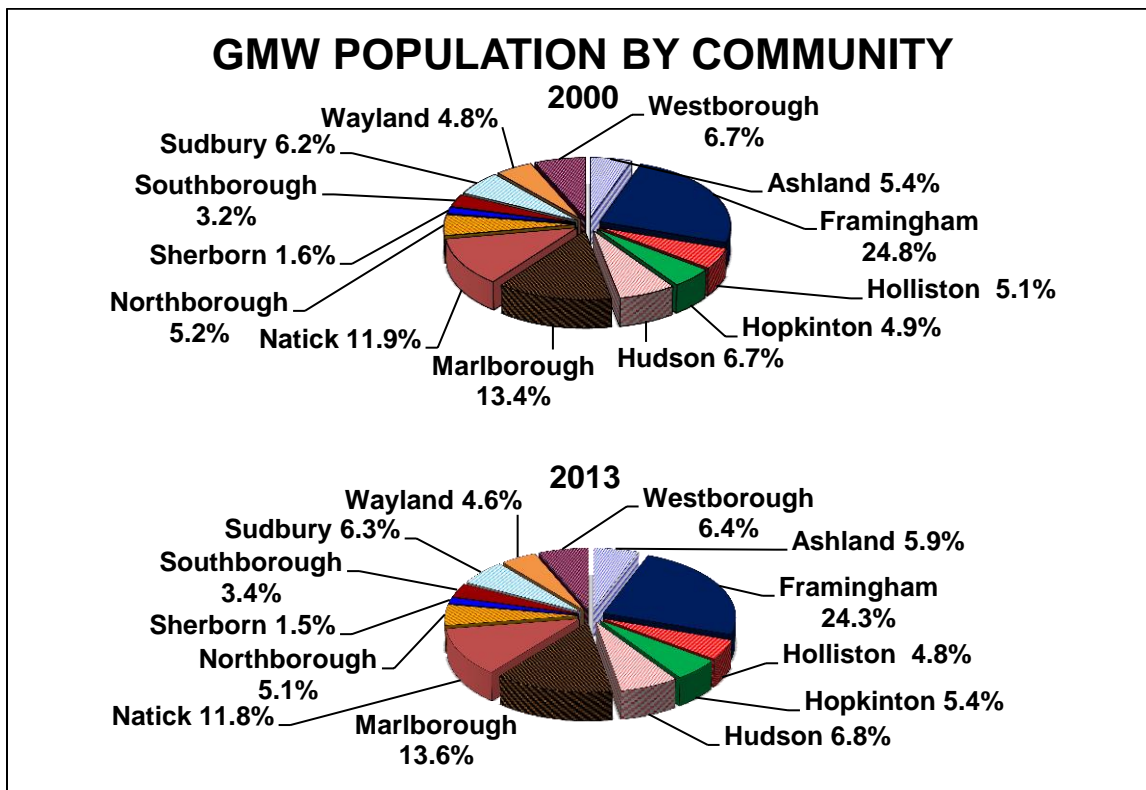


Source: ACS 2009-13 and MERC

ACS estimated that 284,865 individuals lived in Greater MetroWest (GMW) on average between 2009 and 2013. The graph above displays the percentage distribution of those individuals among the thirteen communities in the region. Framingham had the region's largest population with 24.3% of the GMW population or 69,288 civilians. Marlborough had the second largest population at 13.6%, which amounts to 38,842 individuals. Together, these two communities make up over 1/3 of the overall GMW population. The third largest community by population size was Natick, at 11.8%. These three communities together made up about half of GMW's total population. The smallest share of the population resided in Sherborn at 1.5%, accounting for 4,169 residents.

Community	Population	% of GMW
Framingham	69,288	24.3%
Marlborough	38,842	13.6%
Natick	33,634	11.8%
Sherborn	4,169	1.5%
GMW	284,865	100.0%

GREATER METROWEST – POPULATION CHARACTERISTICS

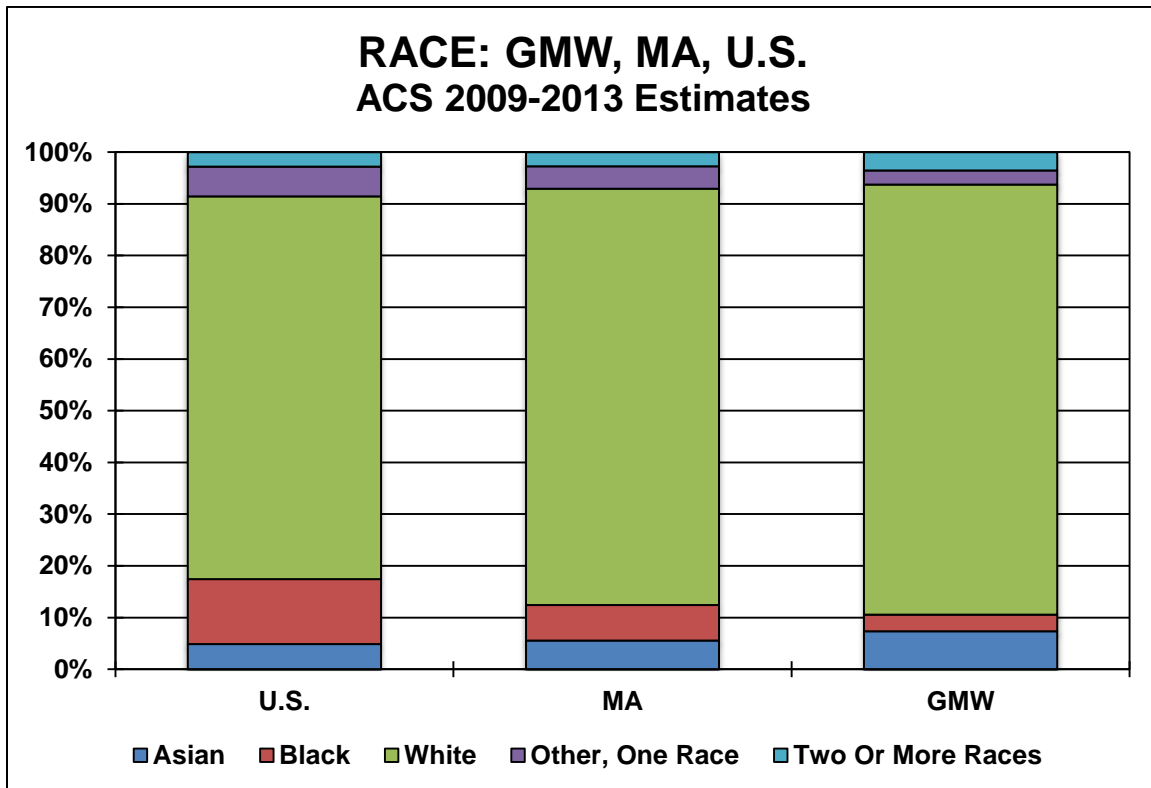


Source: Census 2000 (SF1) and ACS 2009-13 and MERC

According to U.S. Census and ACS, Greater MetroWest's (GMW) population increased by more than 14,600 individuals from 270,201 residents in 2000 to 284,865 residents in 2013. Except for Sherborn, the GMW communities experienced increases in total population over the time period. The percentage composition of total GMW population, measured in terms of community shares, remained approximately the same over the decade.

Community	2000 Population	% of GMW 2000	2013 Population	% of GMW 2013	Pop. Growth
Ashland	14,674	5.4%	16,792	5.9%	14.4%
Framingham	66,910	24.8%	69,288	24.3%	3.6%
Holliston	13,801	5.1%	13,811	4.8%	0.1%
Hopkinton	13,346	4.9%	15,271	5.4%	14.4%
Hudson	18,113	6.7%	19,263	6.8%	6.3%
Marlborough	36,255	13.4%	38,842	13.6%	7.1%
Natick	32,170	11.9%	33,634	11.8%	4.6%
Northborough	14,013	5.2%	14,529	5.1%	3.7%
Sherborn	4,200	1.6%	4,169	1.5%	-0.7%
Southborough	8,781	3.2%	9,807	3.4%	11.7%
Sudbury	16,841	6.2%	17,922	6.3%	6.4%
Wayland	13,100	4.8%	13,166	4.6%	0.5%
Westborough	17,997	6.7%	18,371	6.4%	2.1%
GMW	270,201	100.0%	284,865	100.0%	5.4%

GREATER METROWEST – POPULATION CHARACTERISTICS

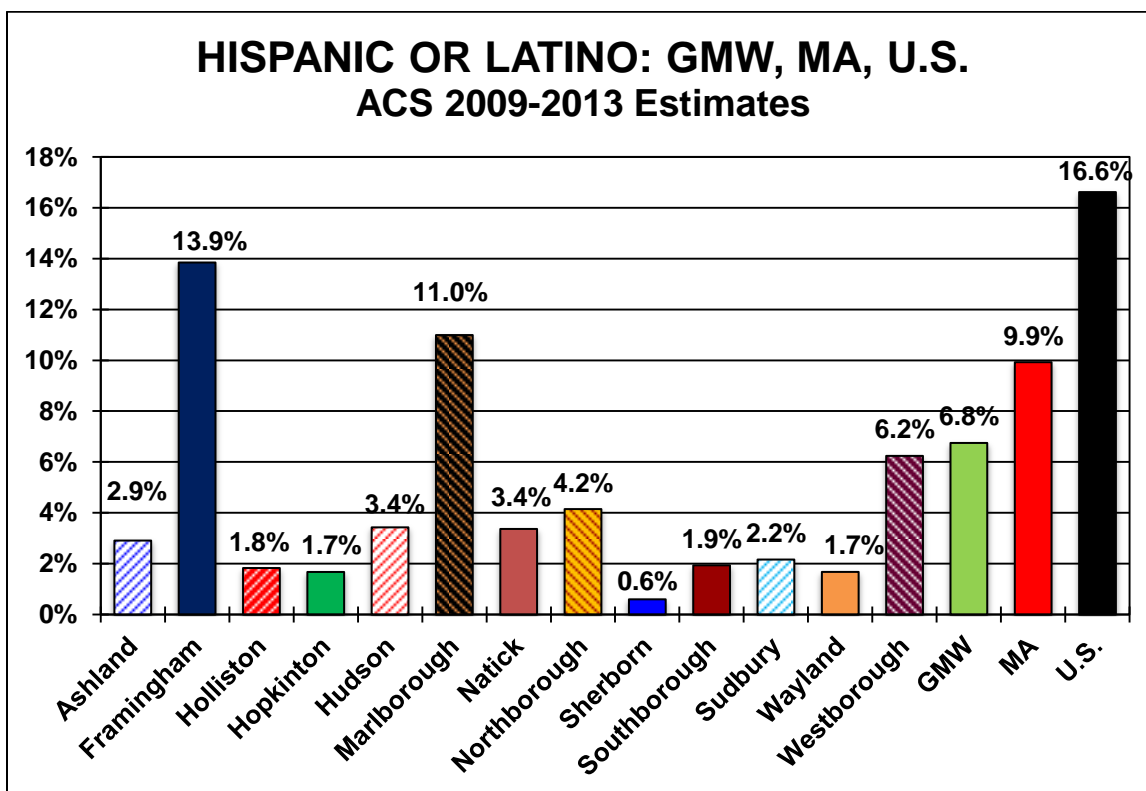


Source: ACS 2009-13 and MERC

The graph above accounts for 100% of the respective populations of the U.S., Massachusetts (MA), and Greater MetroWest (GMW), and uses ACS data collected on the basis of self-identification within racial categories. White comprised 83.2% of the regional population. This is a greater portion than in either state or nation, with 80.5% and 74.0%, respectively. The second biggest self-identified race in GMW was Asian at 7.4%. Similarly, this is a greater percentage than of the state with 5.6%, and of the nation with 4.9%. Black or African American comprised 3.2% of the regional population compared to 6.9% in the state and 12.6% in the nation. People who self-identified as having two or more races made up 3.5% of the GMW population and 2.7% of the GMW population identified themselves as fitting into One Race other than White, Asian, or Black.

	U.S.	MA	GMW
Asian	4.9%	5.6%	7.4%
Black Or African American	12.6%	6.9%	3.2%
White	74.0%	80.5%	83.2%
Other, One Race	5.7%	4.3%	2.7%
Two Or More Races	2.8%	2.7%	3.5%
Population	311,536,594	6,605,058	284,865

GREATER METROWEST – POPULATION CHARACTERISTICS

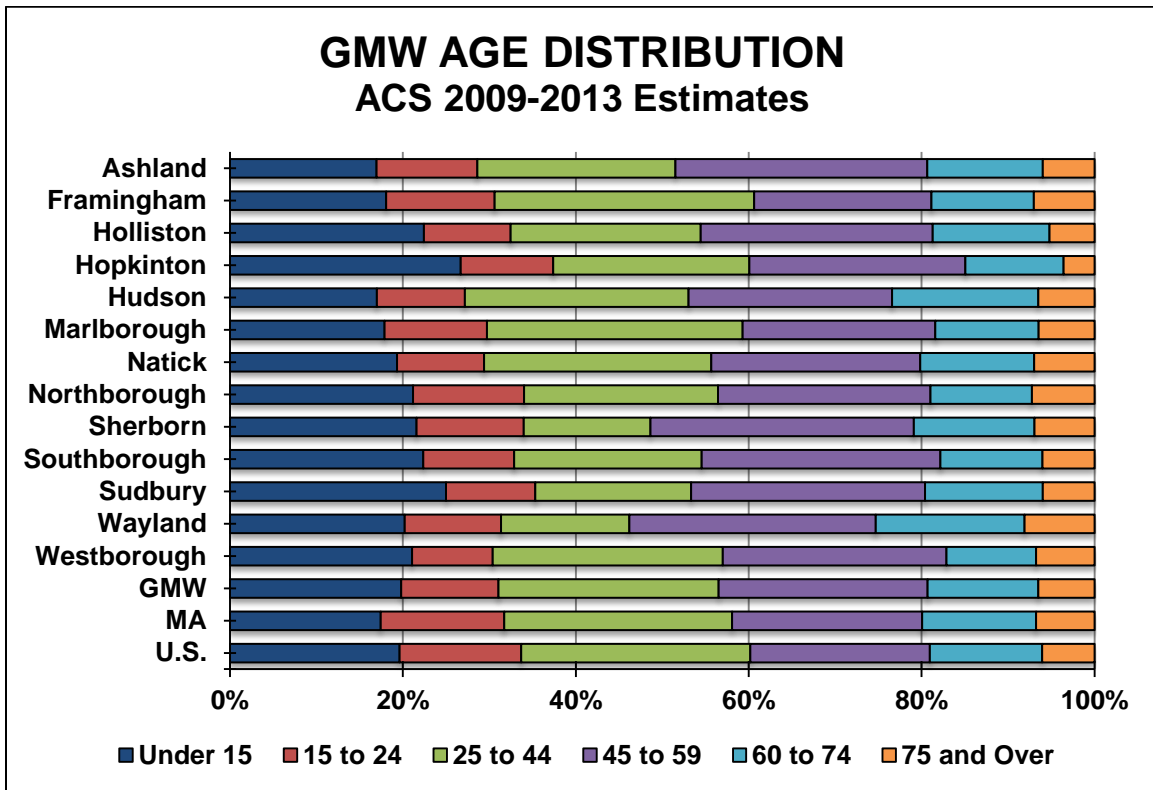


Source: ACS 2009-13 and MERC

In Greater MetroWest (GMW), Sherborn had the lowest regional percentage, or 0.6% of individuals who identified themselves as Hispanic or Latino. Hopkinton and Wayland shared the second lowest regional percentage of 1.7% or about 1 in 59 individuals. Two communities in GMW, Framingham and Marlborough, had percentages higher than the region at 6.8% and the state at 9.9%. In Framingham, Hispanic or Latino comprised 13.9% of the population; this was about 1 in 7 individuals living in the community. Marlborough registered 11.0% of Hispanic or Latino, or 1 in 9 individuals. The only percentage higher than Framingham's was the nation's at 16.6%, or 1 in 6 individuals. Westborough had the third highest regional percentage of Hispanic or Latino individuals in GMW at 6.2%. That is about 1 in 16 individuals living in the town. All other towns in the region recorded less than 4.3% for Hispanic or Latino.

Communities	Total Population	Hispanic or Latino (of any race)	% of Hispanic or Latino
GMW	284,865	19,236	6.8%
MA	6,605,058	655,863	9.9%
U.S.	311,536,594	51,786,591	16.6%

GREATER METROWEST – POPULATION CHARACTERISTICS



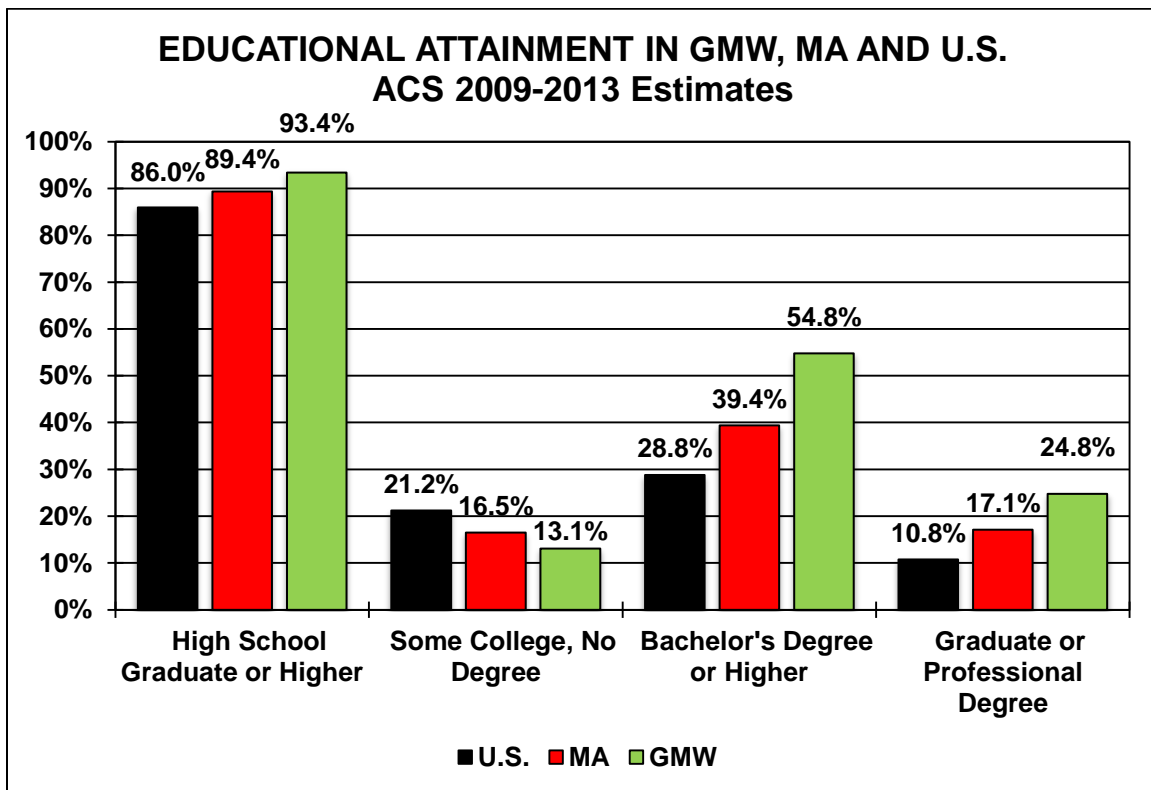
Source: ACS 2009-13 and MERC

The graph above shows the demographic age profile for Greater MetroWest (GMW), its communities, Massachusetts and the United States for six age groups, covering 100% of the respective populations. The under-15-years-of-age category is shown in dark blue. GMW, at 19.8%, had a greater proportion of children less than 15 years of age than Massachusetts, and an equivalent percentage to the nation. Portrayed in purple on the graph, 24.2% of GMW residents were between 45 and 59 years of age, compared with about 22.0% in Massachusetts, and 20.8% in the U.S. Among the 45 to 59 years of age category, the individual towns ranged from 30.5% in Sherborn to 20.5% in Framingham. Three communities, Hudson, Sherborn and Wayland, had percentages greater than 20% of the population for individuals 60 years and over. This is displayed by the combination of both light blue and orange colors on the graph.

Age Group	GMW	MA	U.S.
Under 15	19.8%	17.4%	19.6%
15 to 24	11.3%	14.3%	14.1%
25 to 44	25.5%	26.4%	26.5%
45 to 59	24.2%	22.0%	20.8%
60 to 74	12.8%	13.1%	13.0%
75 and Over	6.5%	6.8%	6.1%



GREATER METROWEST – POPULATION CHARACTERISTICS



Source: ACS 2009-13 and MERC

This graph highlights educational attainment in the region, state and nation. Greater MetroWest (GMW) registered the highest percentage of high school graduate or higher completion at 93.4% of the population. This was higher than both the state and the nation, at 89.4% and 86.0%, respectively. GMW also topped the state and the nation's bachelor degree or higher attainment at 54.8% of the population. This compares to 10 in 18 adults, as opposed to, 10 in 25 for Massachusetts and 10 in 35 for the U.S. Likewise, GMW surpassed the U.S. and Massachusetts graduate or professional degree achievement at 24.8% or about 1 in 4 adults living in the region.

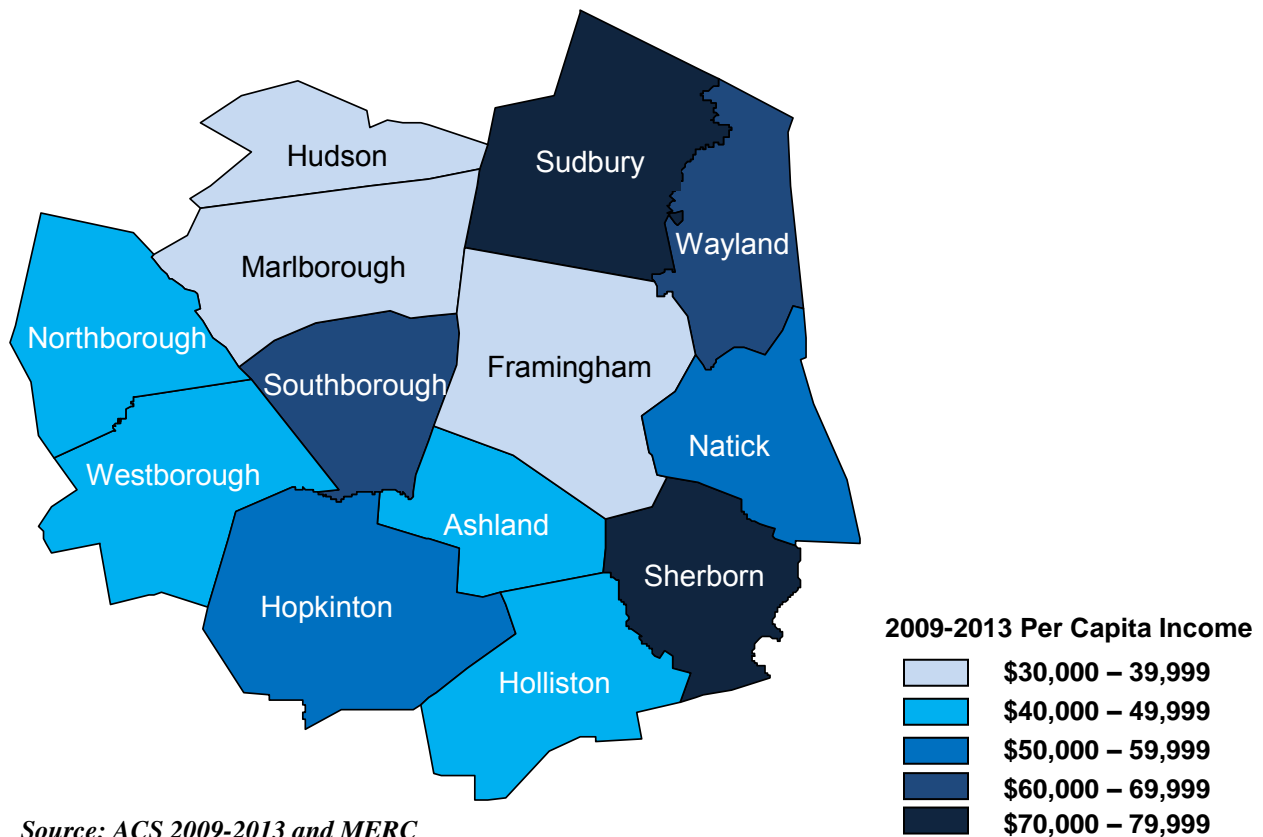
Communities	Population (25+)	High School Graduate or Higher	Some College, No Degree	Bachelor's Degree or Higher	Graduate or Professional Degree
U.S.	206,587,852	86.0%	21.2%	28.8%	10.8%
MA	4,510,714	89.4%	16.5%	39.4%	17.1%
GMW	196,360	93.4%	13.1%	54.8%	24.8%

GREATER METROWEST – HOUSEHOLD CHARACTERISTICS

HOUSEHOLD CHARACTERISTICS

The Greater MetroWest region is comprised of 107,937 households according to the ACS 2009-2013 estimates. This represents an increase of 6.2% or 6,290 households from Census 2000. The increase in the number of households in the time period ranged from 0% in Sherborn to more than 17% in Ashland. Framingham, Marlborough and Natick account for 50.2% of the regions households; the other eleven communities comprise between 1.3% and 12.7% of the regional total. MetroWest households experience higher household incomes compared to the state and the nation. Per capita income for the region is \$45,540 which is 27.3% higher than the Commonwealth and 61.8% higher than the nation. The median household income in every Greater MetroWest community is higher than both the state and the nation. The next five pages describe these results in greater detail.

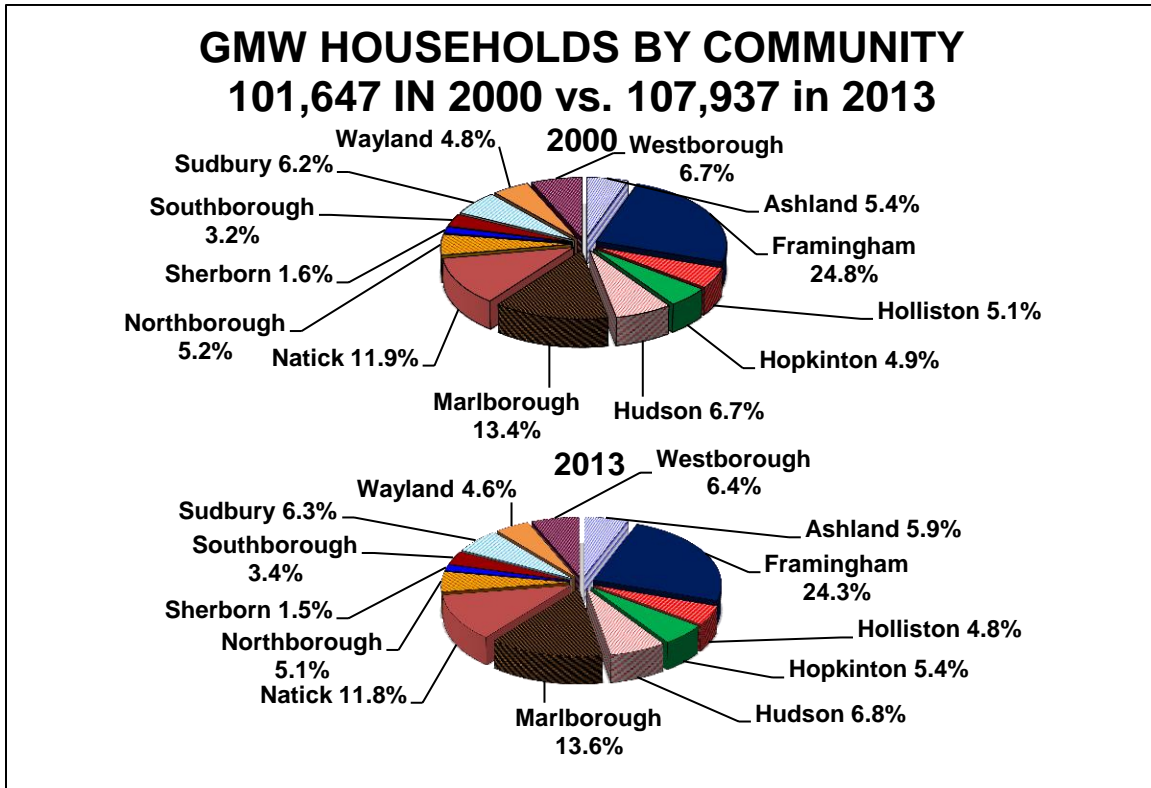
GREATER METROWEST PER CAPITA INCOME ACS 2009-2013 Estimates



Source: ACS 2009-2013 and MERC



GREATER METROWEST – HOUSEHOLD CHARACTERISTICS

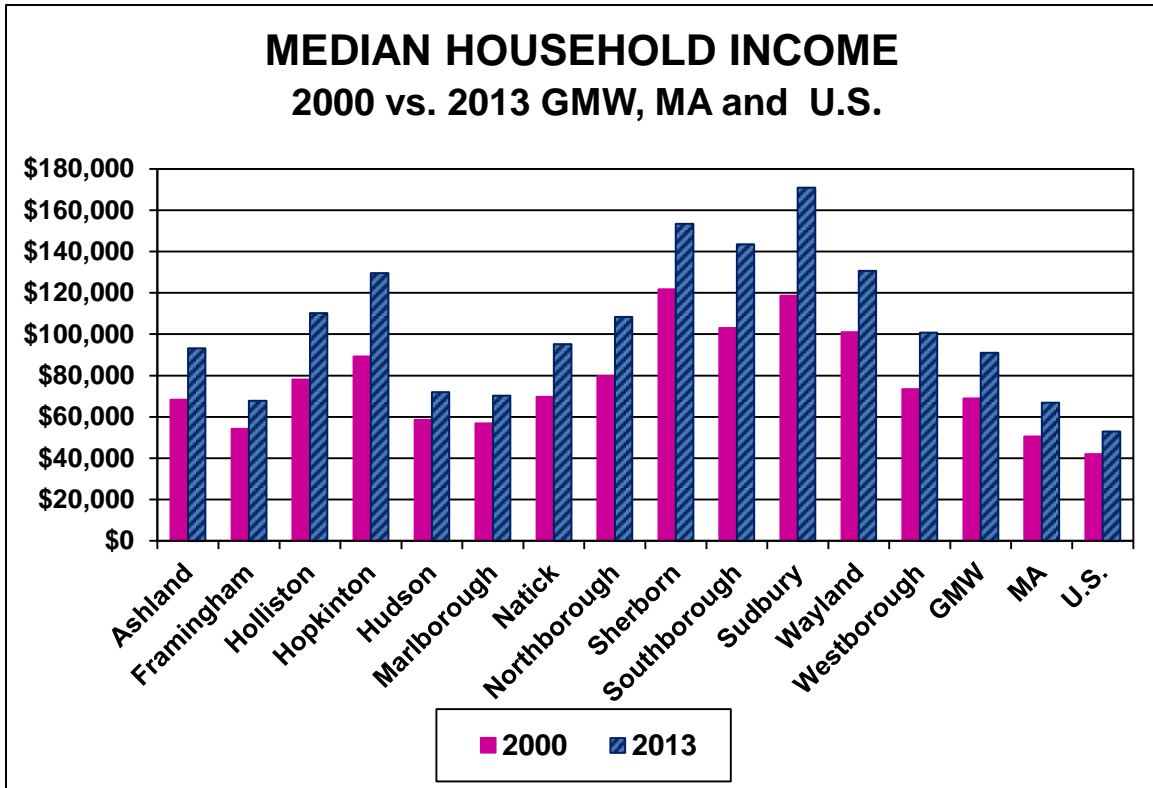


Source: Census 2000 and ACS 2009-13 and MERC

The number of households in Greater MetroWest increased from 2000 to 2013 by 6.19% from 101,647 to an estimated 107,937 households. In 2013 about 69% of total households were designated family households, and 31% non-family households, compared to 71% of family households in 2000. As in 2000, Framingham and Marlborough have the highest number of households in 2013, together accounting for 39.2% of the regional total. This is up from 37.9% in 2000. All Greater MetroWest communities, except for Sherborn, experienced an increase in the number of households from 2000 to 2013 with growth rates varying from 1.35% in Framingham and 16.98% in Ashland. Hopkinton at 14.67% and Southborough at 11.54% also have notable percentage increases in the number of households.

Selected Communities	# Households 2000	# Households 2013	Change in # Households	% Change in # Households
Ashland	5,729	6,702	973	16.98%
Framingham	26,147	26,501	354	1.35%
Hopkinton	4,423	5,072	649	14.67%
Marlborough	14,516	15,730	1,214	8.36%
Sherborn	1,427	1,427	0	0.00%
Southborough	2,928	3,266	338	11.54%
GMW	101,647	107,937	6,290	6.19%

GREATER METROWEST – HOUSEHOLD CHARACTERISTICS



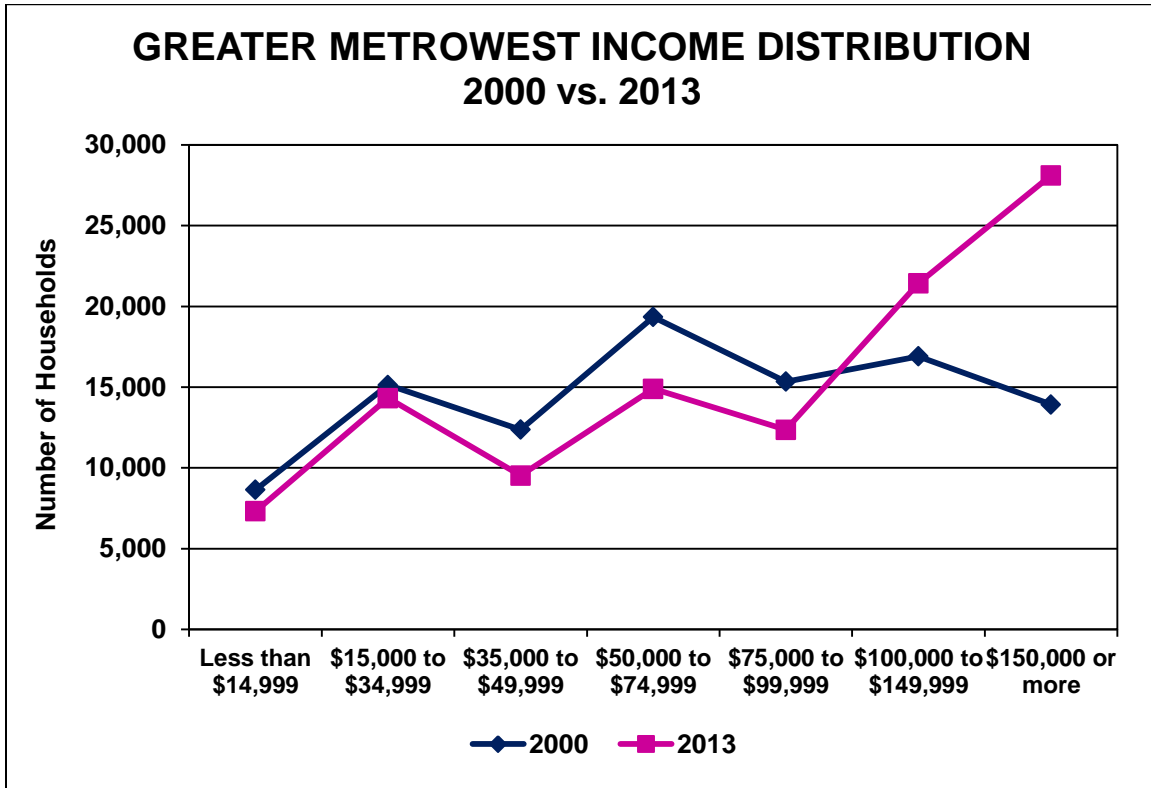
Source: Census 2000 and ACS 2009-13 and MERC

Median household income in 2013 in Greater MetroWest is estimated at \$91,020. The Greater MetroWest value exceeded that of both Massachusetts at \$66,866 and the United States at \$53,046. All thirteen Greater MetroWest communities have median incomes above both the state and the nation. According to the ACS 2009-2013 estimates, median household income in 2013 ranges from \$67,915 in Framingham to \$170,924 in Sudbury. Notably, seven other communities have 2013 estimated median household incomes above \$100,000. The increase in median household income from 2000 to 2013, unadjusted for inflation, was more than \$22,041 in GMW, compared to \$16,364 for the state and \$11,052 for the nation.

Communities	2000 Median HH Income	2013 Median HH Income	Increase in Median HH Income	% Change in Median HH Income
GMW	\$68,979	\$91,020	\$22,041	31.95%
MA	\$50,502	\$66,866	\$16,364	32.40%
U.S.	\$41,994	\$53,046	\$11,052	26.32%



GREATER METROWEST – HOUSEHOLD CHARACTERISTICS

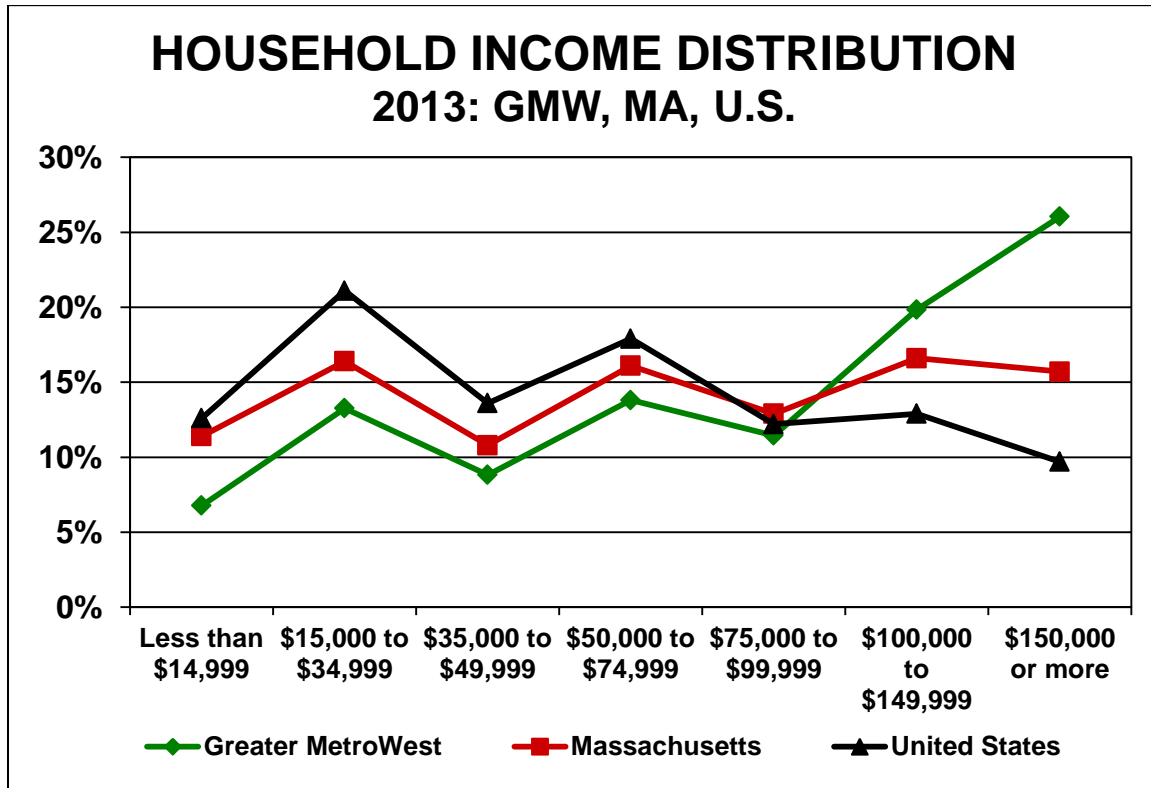


Source: Census 2000 and ACS 2009-13 and MERC

According to the ACS 2009-2013 estimates, the income distribution for Greater MetroWest is skewed toward the upper income ranges. In 2013 about 20% or about 21,631 Greater MetroWest households had household income less than \$35,000 compared to 23% or 23,777 GMW households in 2000. An estimated 26% or 28,107 GMW households have household incomes of \$150,000 or more compared to about 14% and 13,919 households in year 2000. Compared to 2000, the number of households with incomes greater than \$150,000 more than doubled. The largest number of households in 2000 fell into the \$50,000 to \$74,999 category while the largest number of households in 2013 fell in the \$150,000 or more category.

INCOME GROUP	2000 HOUSEHOLDS	2013 HOUSEHOLDS
Less than \$14,999	8,647	7,315
\$15,000 to \$34,999	15,130	14,316
\$35,000 to \$49,999	12,365	9,524
\$50,000 to \$74,999	19,339	14,896
\$75,000 to \$99,999	15,344	12,356
\$100,000 to \$149,999	16,903	21,423
\$150,000 or more	13,919	28,107
Total Households	101,647	107,937
Median HH Income	68,979	91,020
Per Capita Income	39,397	45,540

GREATER METROWEST – HOUSEHOLD CHARACTERISTICS

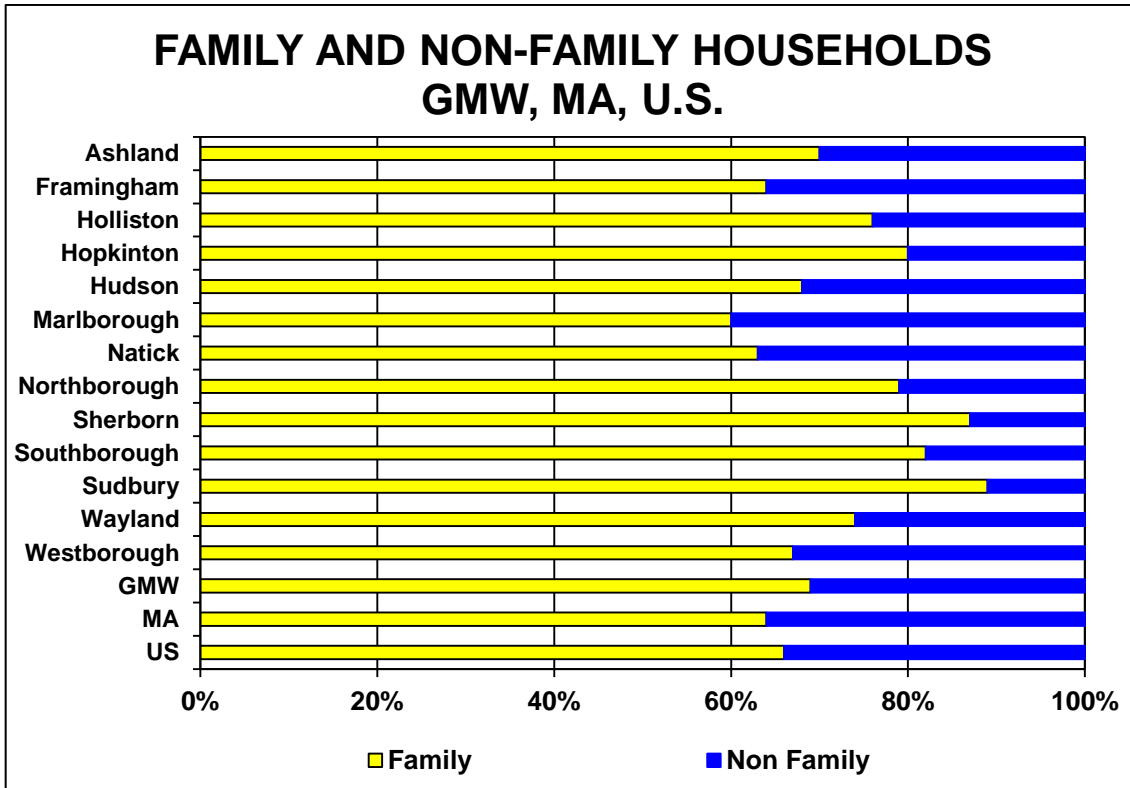


Source: ACS 2009-13 and MERC

The income distribution based on the ACS 2009-2013 estimates for Greater MetroWest, Massachusetts and the United States are compared in the graph, and below in the table. Greater MetroWest residents experience household incomes in the upper income categories at much higher rates than those in the state and nation. Greater MetroWest has its highest number of households in the \$150,000 or more category while Massachusetts has its highest number in the \$100,000 to \$149,000 category. In the nation, more than 21% of households fall in the \$15,000 to \$34,999 category. Fewer than 12% of Commonwealth households and fewer than 7% of Greater MetroWest households fall in the lowest income group. In the highest income group, \$150,000 or more, Greater MetroWest's proportion is almost three times that of the nation, and more than 1.5 times that of the Commonwealth.

INCOME GROUP	GMW	MA	U.S.
Less than \$14,999	6.78%	11.40%	12.60%
\$15,000 to \$34,999	13.26%	16.40%	21.10%
\$35,000 to \$49,999	8.82%	10.80%	13.60%
\$50,000 to \$74,999	13.80%	16.10%	17.90%
\$75,000 to \$99,999	11.45%	12.90%	12.20%
\$100,000 to \$149,999	19.85%	16.60%	12.90%
\$150,000 or more	26.04%	15.70%	9.70%
Total Households	107,937	2,530,147	115,610,216
Median HH Income	\$91,020	\$66,866	\$53,046

GREATER METROWEST – HOUSEHOLD CHARACTERISTICS



Source: ACS 2009-13 and MERC

A greater portion of families occupy households in Greater MetroWest than in Massachusetts or the United States: 68.7% in GMW compared to 63.5% in the state and 66.4% in the nation, as indicated by the yellow bar above. This percent varied in GMW from 59.5% in Marlborough to 88.9% in Sudbury.

	# Households	# Family Households	Family HH as % of all HH
Ashland	6,702	4,723	70.5%
Framingham	26,501	16,925	63.9%
Holliston	4,877	3,703	75.9%
Hopkinton	5,072	4,044	79.7%
Hudson	7,746	5,244	67.7%
Marlborough	15,730	9,363	59.5%
Natick	13,690	8,635	63.1%
Northborough	5,079	4,021	79.2%
Sherborn	1,427	1,240	86.9%
Southborough	3,266	2,682	82.1%
Sudbury	5,783	5,142	88.9%
Wayland	5,084	3,769	74.1%
Westborough	6,980	4,696	67.3%
GMW	107,937	74,187	68.7%
MA	2,530,147	1,607,082	63.5%
U.S.	115,610,216	76,744,358	66.4%

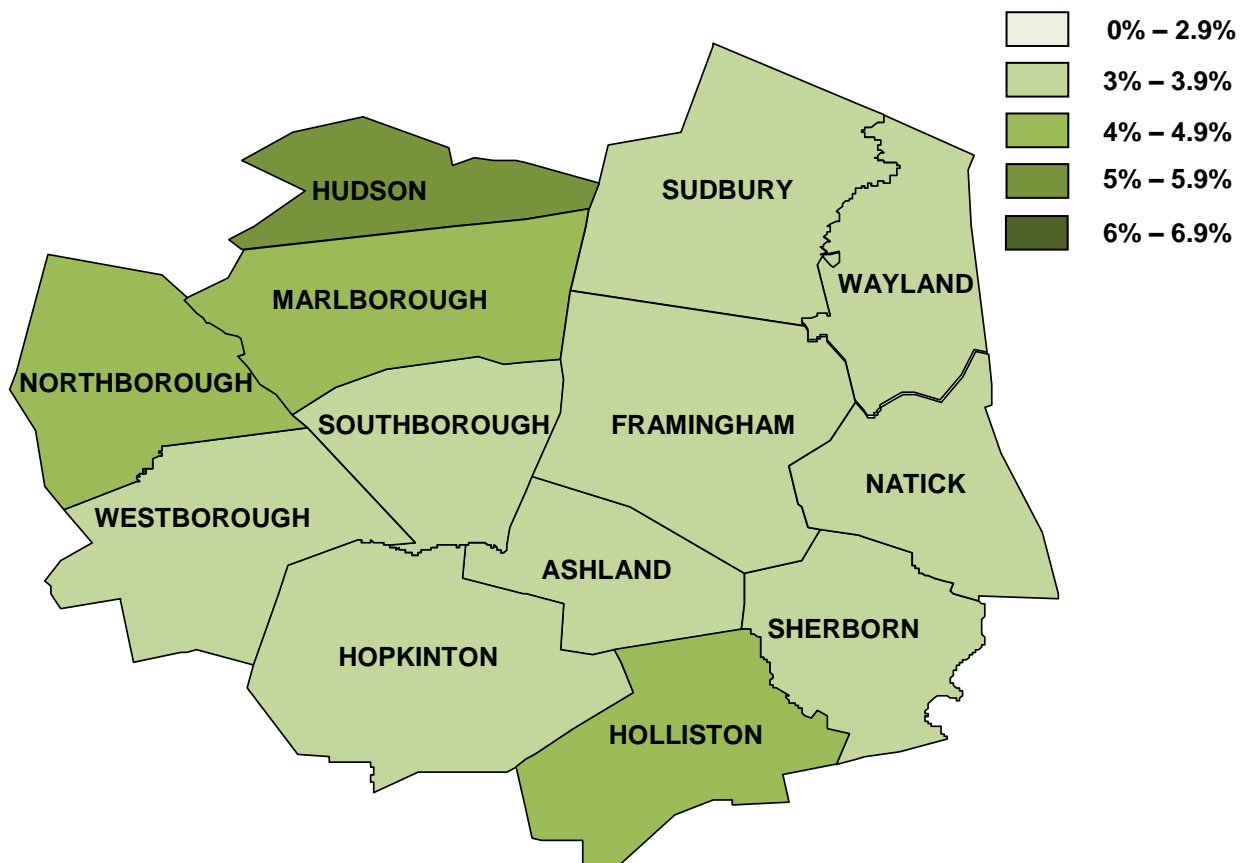


GREATER METROWEST – LABOR FORCE OVERVIEW

LABOR FORCE OVERVIEW

The Greater MetroWest (GMW) 2014 annual average labor force consisted of 159,336 residents currently employed or unemployed. Framingham dominates the labor force with 24.6% of the regional total. Marlborough follows with 14.6%. Over the business cycle of the last ten years, the GMW unemployment rate remained characteristically lower than the state and nation's annual unemployment rates. The regional monthly unemployment rates across January 2005 to 2015 reached the lowest point in the fourth quarter of 2007 and a high in the first quarter of 2010. According to the 2009 - 2013 ACS estimates, labor force participation rates are higher for the region's residents, both male and female, than for either the state or nation. The next seven pages describe these results in greater detail.

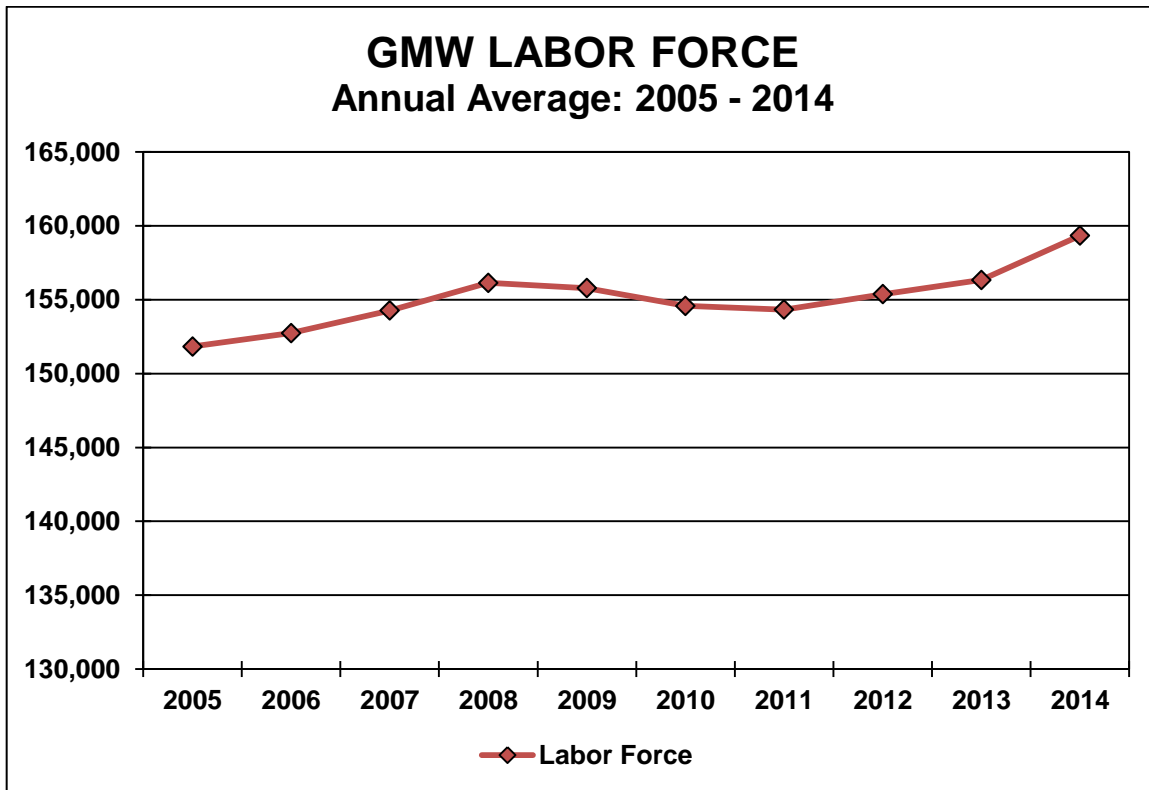
GMW UNEMPLOYMENT RATES FOR FEBRUARY 2015



Source: MA EOLWD and MERC



GREATER METROWEST – LABOR FORCE OVERVIEW



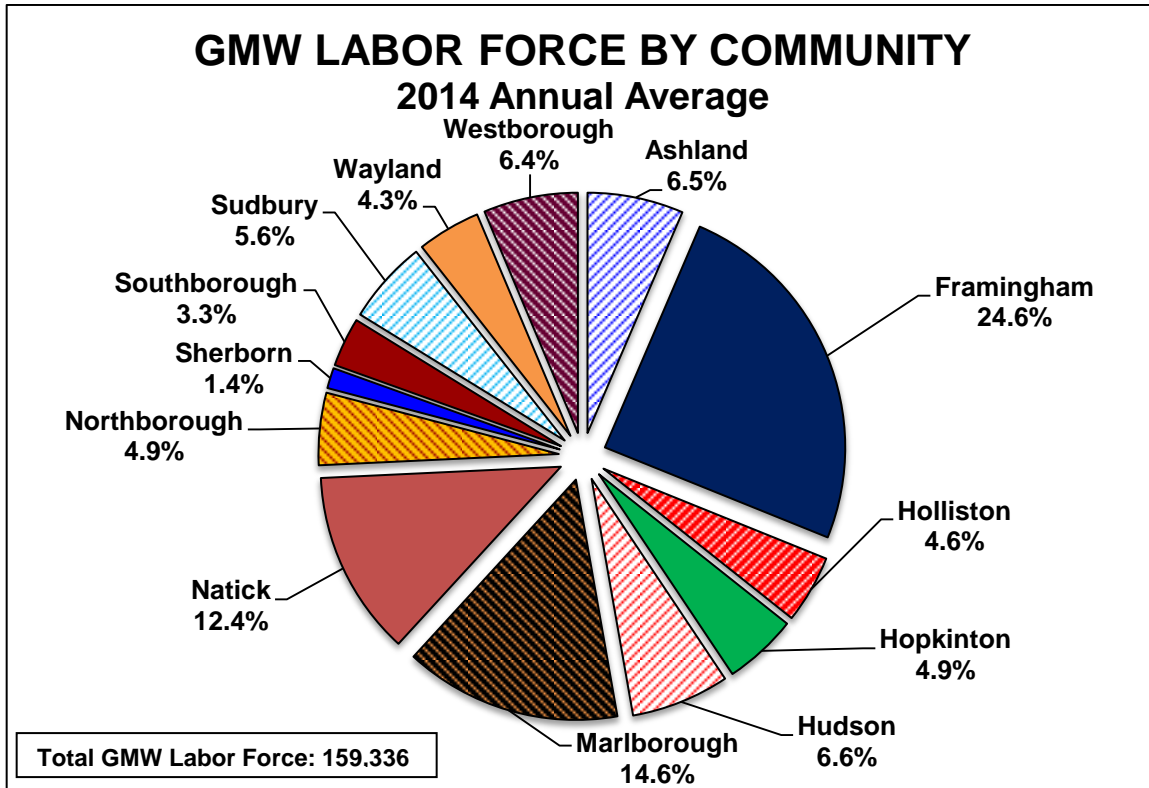
Source: MA EOLWD and MERC

The total number of individuals in the labor force is made up of residents in Greater MetroWest (GMW) currently employed or unemployed. The GMW labor force grew by about 4.9% throughout 9 years, from 151,800 in 2005 to 159,300 in 2014. The GMW labor force has grown steadily throughout these past 9 years, aside from slight declines in 2009, 2010, and 2011.

Year	Labor Force	Annual % Change
2005	151,827	N/A
2006	152,745	0.6%
2007	154,272	1.0%
2008	156,142	1.2%
2009	155,781	-0.2%
2010	154,585	-0.8%
2011	154,327	-0.2%
2012	155,369	0.7%
2013	156,334	0.6%
2014	159,336	1.9%



GREATER METROWEST – LABOR FORCE OVERVIEW



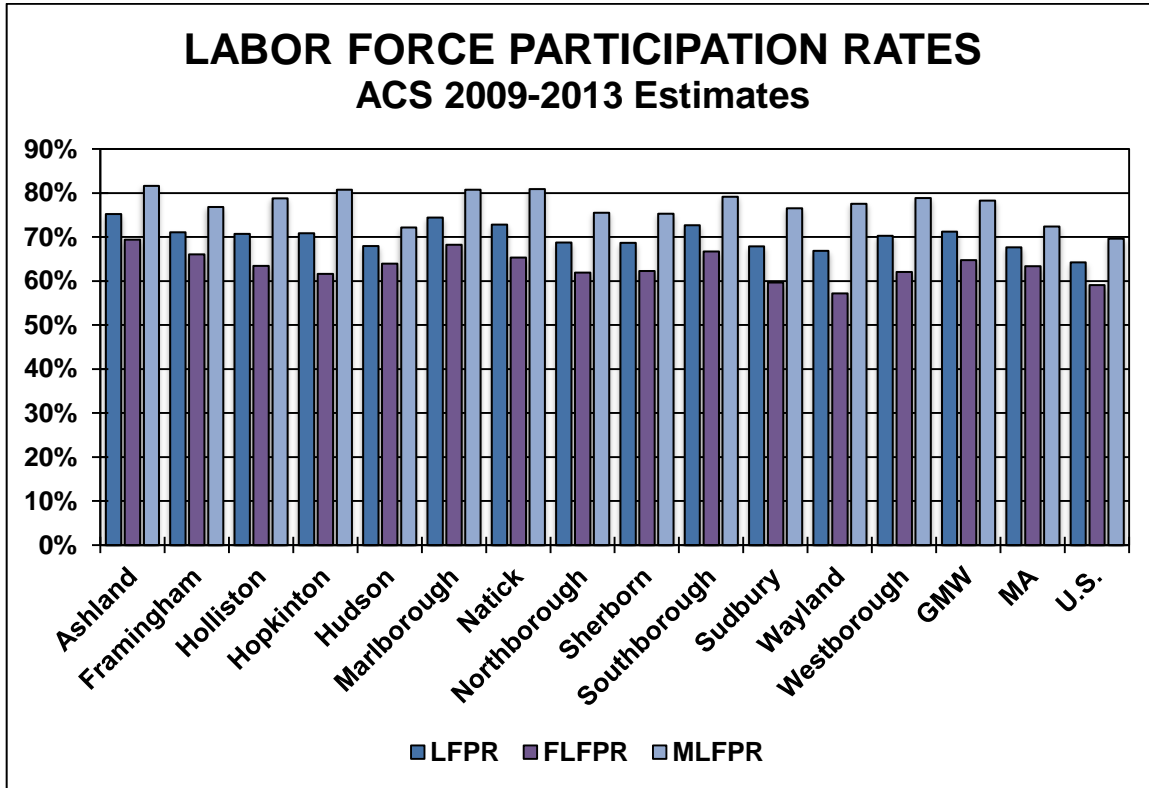
Source: MA EOLWD and MERC

In 2014, the annual average of individuals in the labor force in Greater MetroWest (GMW) was 159,336. Among the communities in GMW, Framingham was the largest contributor to the labor force with 24.6%, or 39,271 individuals. The second largest contributor was Marlborough with 14.6% of the total, adding up to 23,230 individuals. Natick followed with 12.4% of the labor force, or 19,814 individuals. These three communities together accounted for over half of the total labor force in GMW. The smallest contributor to the GMW labor force was Sherborn with 1.4%, or 2,184 individuals.

Communities	Labor Force 2014	% of GMW
Ashland	10,296	6.5%
Framingham	39,271	24.6%
Holliston	7,287	4.6%
Hopkinton	7,879	4.9%
Hudson	10,532	6.6%
Marlborough	23,230	14.6%
Natick	19,814	12.4%
Northborough	7,744	4.9%
Sherborn	2,184	1.4%
Southborough	5,264	3.3%
Sudbury	8,933	5.6%
Wayland	6,780	4.3%
Westborough	10,122	6.4%



GREATER METROWEST – LABOR FORCE OVERVIEW



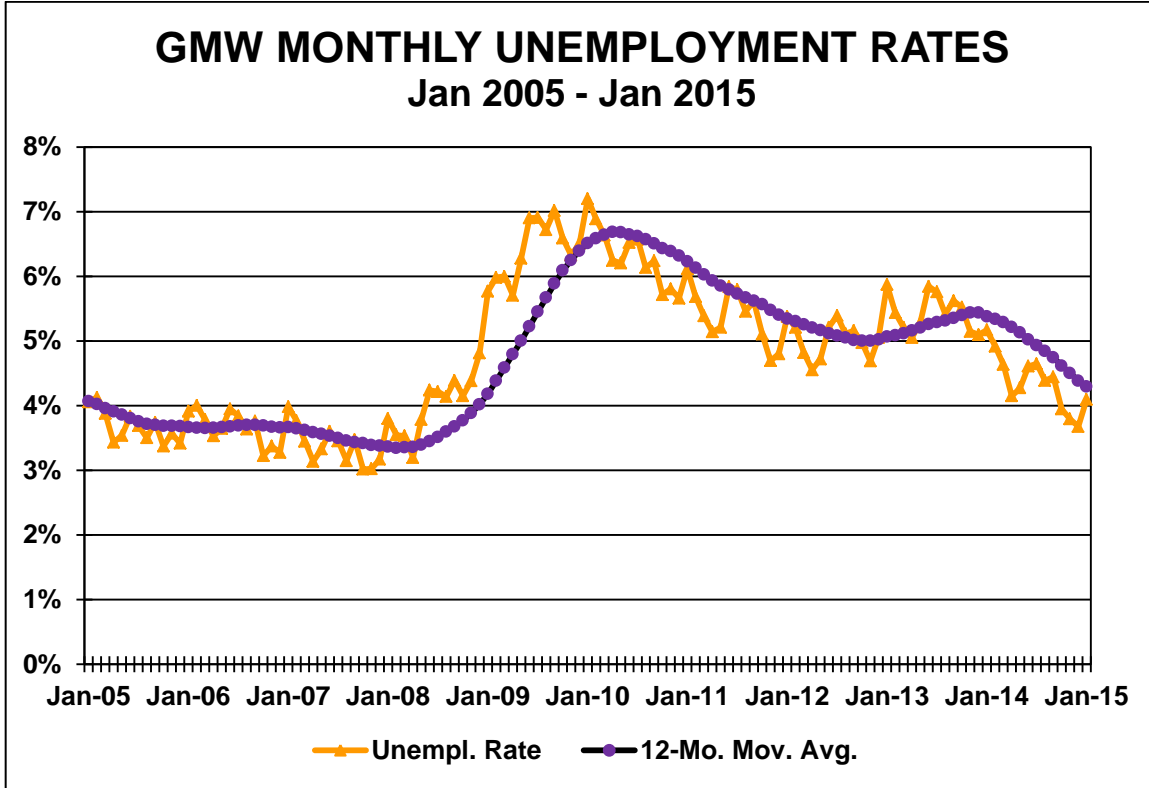
Source: ACS 2009-13 and MERC

Residents in Greater MetroWest (GMW) participate in the labor force at higher rates than their state and national counterparts. About 71.3% of the GMW population 16 years and older are labor force participants. This can be compared to 67.7% for Massachusetts, and 64.3% for the United States. In general, females have lower participation rates than males. For both females and males, labor force participation rates are higher in GMW than in either the state or nation. Participation rates for Massachusetts are higher than those for the United States. Labor force participants include those who work or are actively seeking work during the reference time period.

	Population (16+)	LFPR	Females (16+)	FLFPR	Males (16+)	MLFPR
GMW	224,362	71.3%	116,621	64.8%	107,741	78.3%
MA	5,371,252	67.7%	2,804,230	63.4%	2,567,022	72.4%
U.S.	246,191,954	64.3%	126,347,728	59.1%	119,844,226	69.7%



GREATER METROWEST – LABOR FORCE OVERVIEW



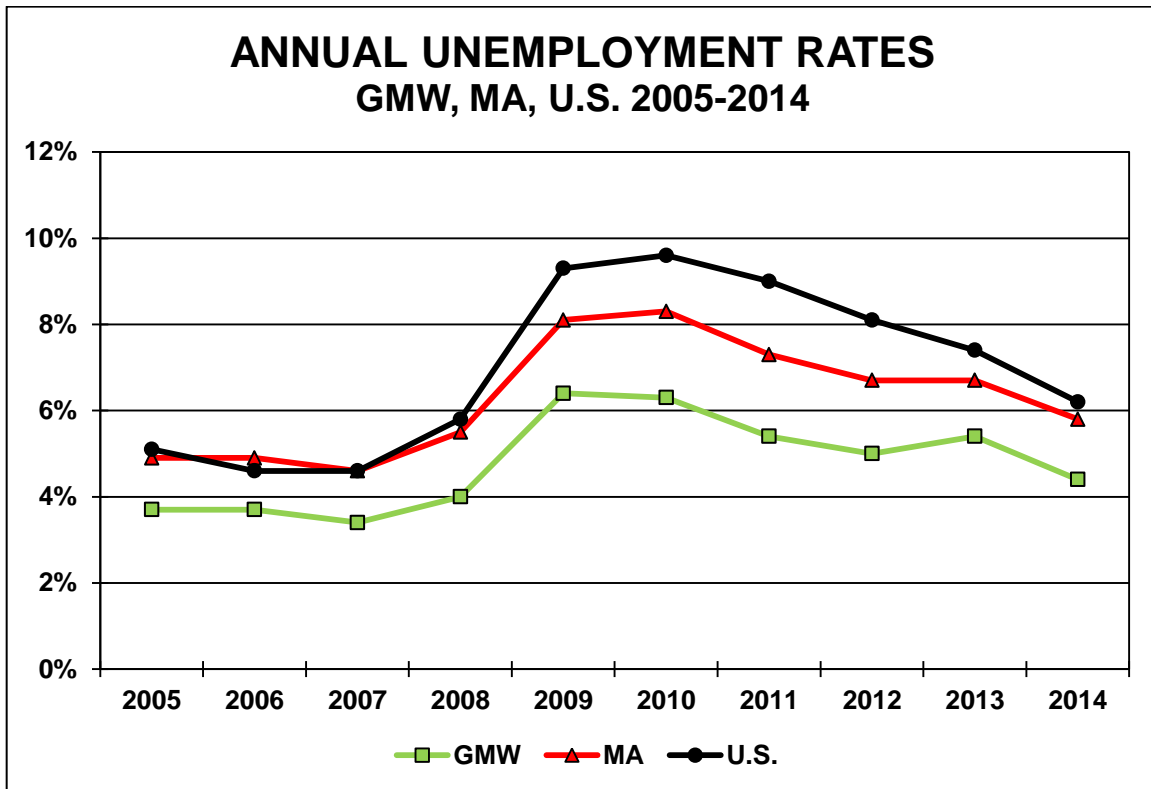
Source: MA EOLWD and MERC

Monthly unemployment rates and the 12-month moving average are displayed for Greater MetroWest (GMW) from January 2005 to January 2015. The monthly rates vary during the year due to seasonal considerations. The 12-month moving average evens out the month-to-month variation of the data. During this period, GMW reached its lowest unemployment rate of 3.0% in both October and November of 2007. In the most recent recession, the monthly GMW unemployment rate reached the peak in January 2010 at 7.2%.

Year	Monthly Unemployment Rates			
	January	April	July	October
2005	4.1%	3.4%	3.7%	3.4%
2006	3.9%	3.5%	3.8%	3.2%
2007	4.0%	3.1%	3.5%	3.0%
2008	3.8%	3.2%	4.2%	4.2%
2009	5.8%	5.7%	6.9%	6.6%
2010	7.2%	6.2%	6.6%	5.7%
2011	6.1%	5.1%	5.8%	5.1%
2012	5.4%	4.6%	5.4%	5.0%
2013	5.9%	5.1%	5.8%	5.5%
2014	5.2%	4.2%	4.6%	3.9%
2015	4.1%	---	---	---



GREATER METROWEST – LABOR FORCE OVERVIEW



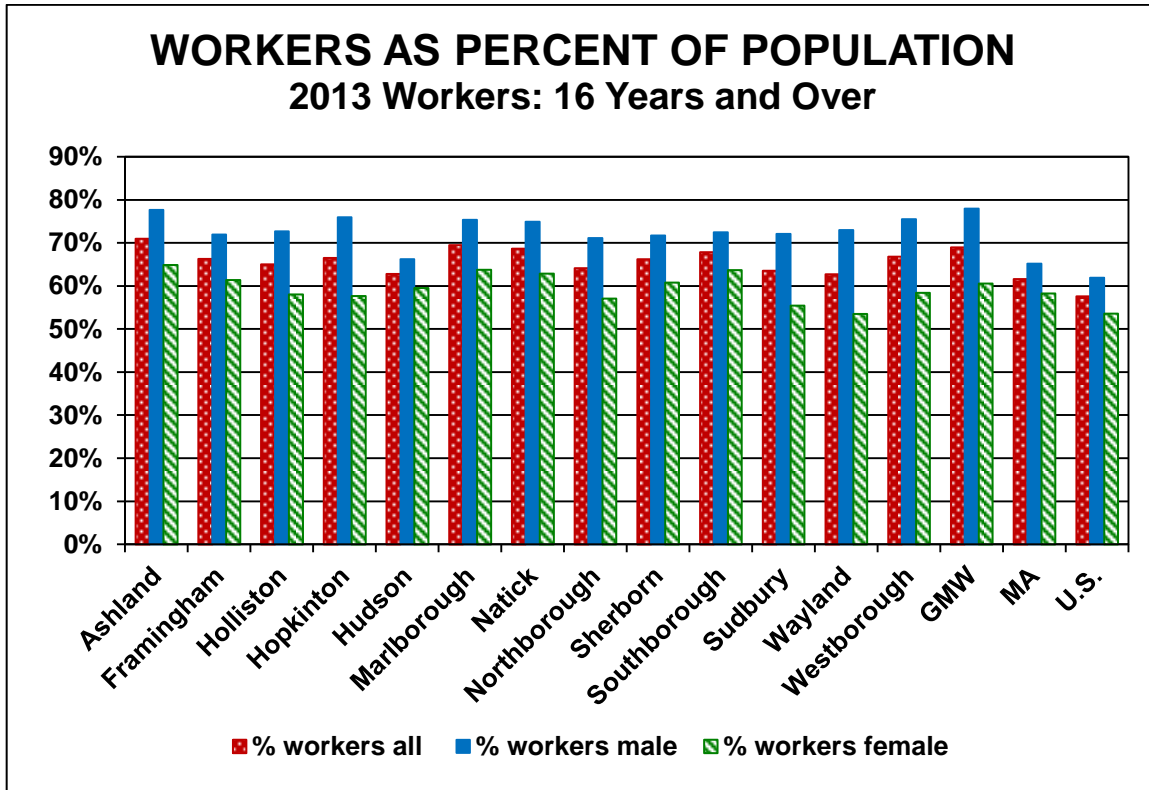
Source: MA EOLWD and MERC

Greater MetroWest (GMW) residents experienced lower annual unemployment rates than either Massachusetts or the United States from 2005 through 2014. GMW recorded the highest annual unemployment rate in 2009 at 6.4%. While the unemployment rate in MA and the U.S. were highest in 2010, at 8.3% and 9.6%, respectively. The unemployment rate in all three regions attained a low in 2007: GMW at 3.4%, Massachusetts at 4.6%, and the United States at 4.6%.

Year	GMW	MA	U.S.
2005	3.7%	4.9%	5.1%
2006	3.7%	4.9%	4.6%
2007	3.4%	4.6%	4.6%
2008	4.0%	5.5%	5.8%
2009	6.4%	8.1%	9.3%
2010	6.3%	8.3%	9.6%
2011	5.4%	7.3%	9.0%
2012	5.0%	6.7%	8.1%
2013	5.4%	6.7%	7.4%
2014	4.4%	5.8%	6.2%



GREATER METROWEST – LABOR FORCE OVERVIEW



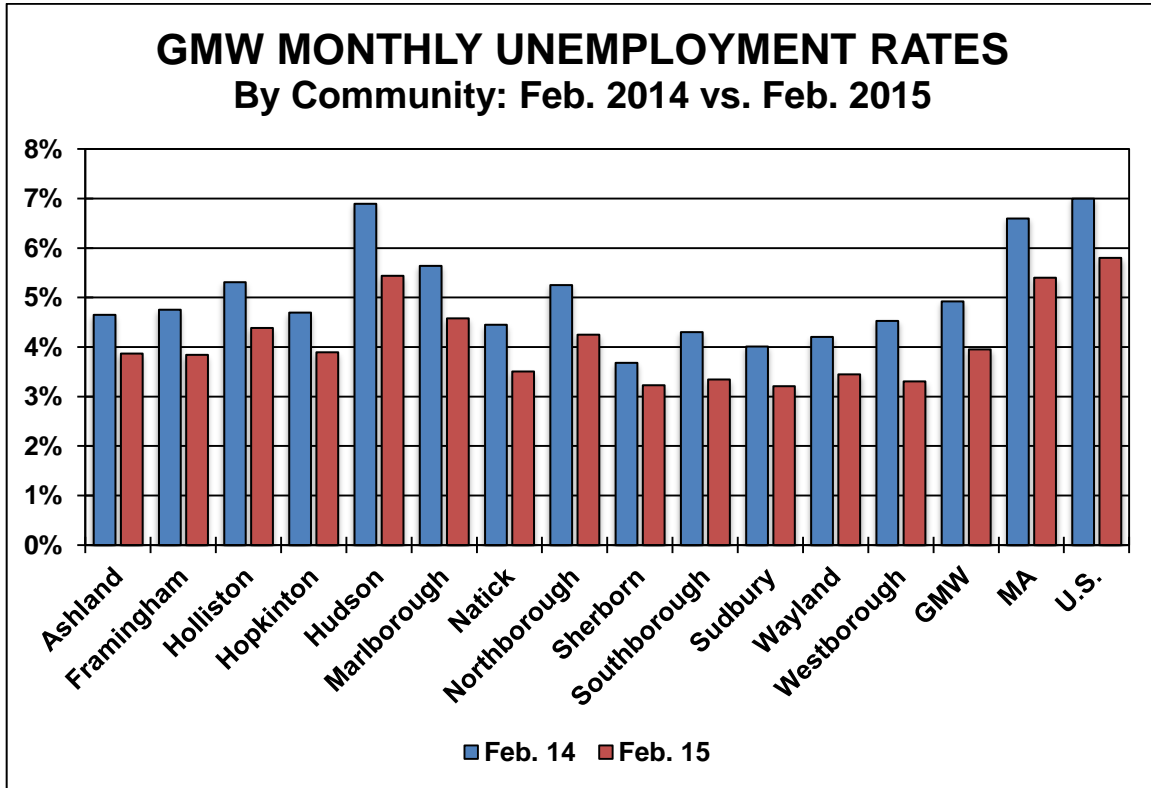
Source: ACS 2009-13 and MERC

A greater portion of Greater MetroWest (GMW) residents 16 years and over, both male and female worked at some point during 2013 than their state and national counterparts. About 78% of GMW males and more than 60% of females worked in 2013. Almost 69% of all persons aged 16 years and over in Greater MetroWest worked in 2013, compared to 61.6% in MA and 57.6% in the U.S.

	% of Population (16+) Who Worked in 2013		
	All	Male	Female
Ashland	71.0%	77.7%	64.9%
Framingham	66.3%	71.9%	61.4%
Holliston	65.0%	72.7%	58.1%
Hopkinton	66.5%	76.0%	57.7%
Hudson	62.8%	66.2%	59.5%
Marlborough	69.5%	75.4%	63.8%
Natick	68.6%	74.9%	62.8%
Northborough	64.1%	71.1%	57.1%
Sherborn	66.2%	71.7%	60.8%
Southborough	67.9%	72.5%	63.7%
Sudbury	63.6%	72.1%	55.5%
Wayland	62.7%	73.0%	53.5%
Westborough	66.8%	75.5%	58.4%
GMW	68.9%	78.0%	60.6%
MA	61.6%	65.2%	58.3%
U.S.	57.6%	61.9%	53.6%



GREATER METROWEST – LABOR FORCE OVERVIEW



Source: MA EOLWD and MERC

In February 2014, most of the communities in the Greater MetroWest (GMW) posted lower unemployment rates than the Massachusetts rate and the United States rate of 6.6% and 7.0% respectively. Hudson was the only community that posted a higher unemployment rate than the state, at 6.9%; yet lower than the rate of the nation in February 2014. Similarly, in February 2015, most of the communities in GMW posted lower rates than the state and the nation at 5.4% and 5.8% respectively. In February 2015, Hudson posted an equivalent rate to the state, at 5.4%, which was a lower unemployment rate than the U.S. Throughout the GMW communities, the decline in the unemployment rate from February 2014 to February 2015 varied from -0.5% in Sherborn to -1.5% in Hudson. Moreover, the GMW change in unemployment rate from February 2014 to February 2015 was positioned in the middle of this range at -0.9%.

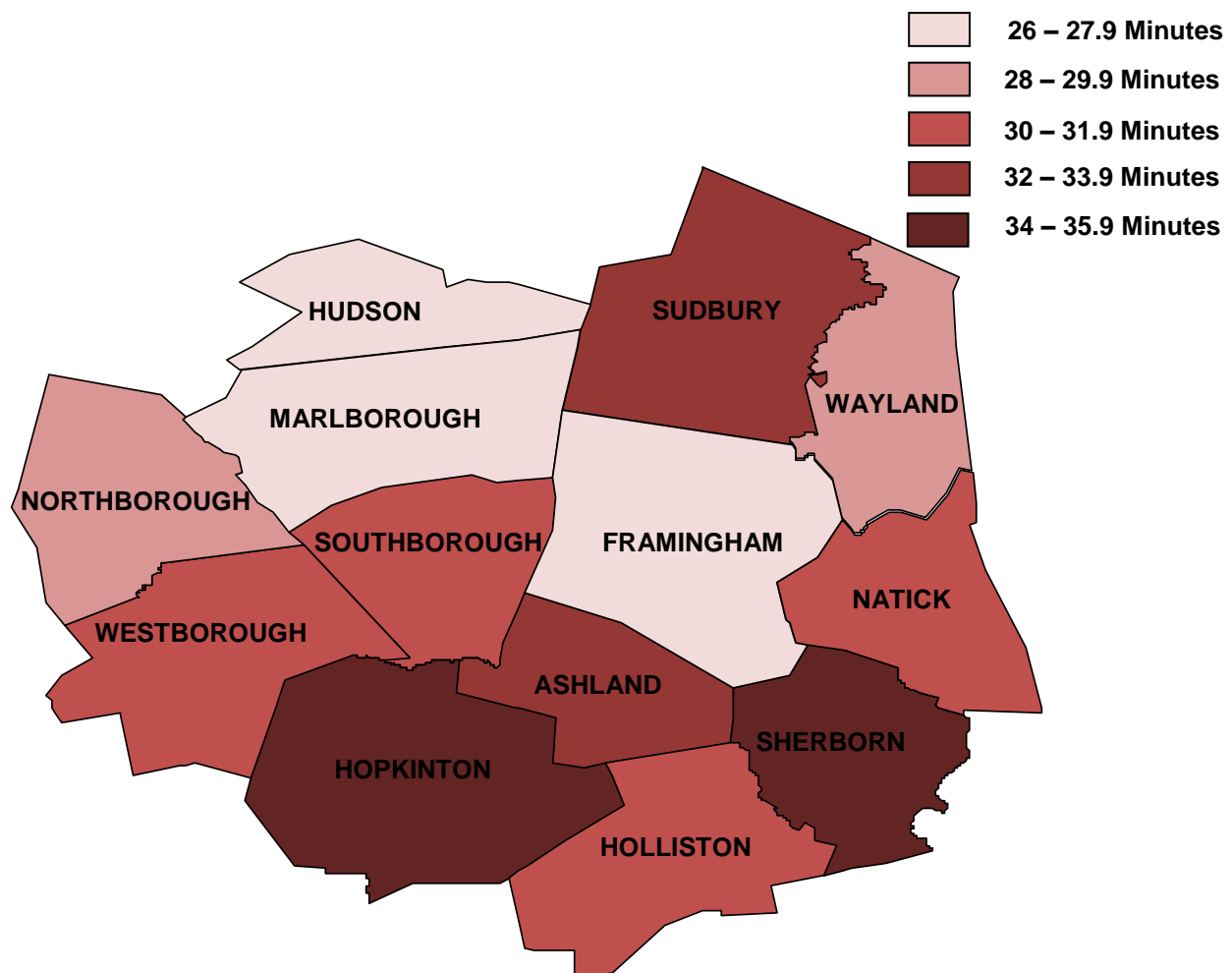
Communities	Monthly Unemployment Rates		
	February 2014	February 2015	Change in Unemployment Rate
GMW	4.9%	4.0%	-0.90%
MA	6.6%	5.4%	-1.20%
U.S.	7.0%	5.8%	-1.20%

GREATER METROWEST – LABOR FORCE CHARACTERISTICS

LABOR FORCE CHARACTERISTICS

Greater MetroWest (GMW) paid employees are more likely to be in the private sector than their state and national counterparts, less likely to hold jobs in the public sector, and more likely to be self-employed. Proportionately more GMW workers drive alone to work than workers in Massachusetts and the United States. One way mean travel time to work for GMW workers is 29.5 minutes, higher than Massachusetts and the United States. Employees who live in GMW are more likely than state employees to be affiliated with the Professional and Business Services, Information, Manufacturing and Financial Activities industries. More than 51% of GMW employees are in management and professional occupations. The next seven pages describe these results in greater detail.

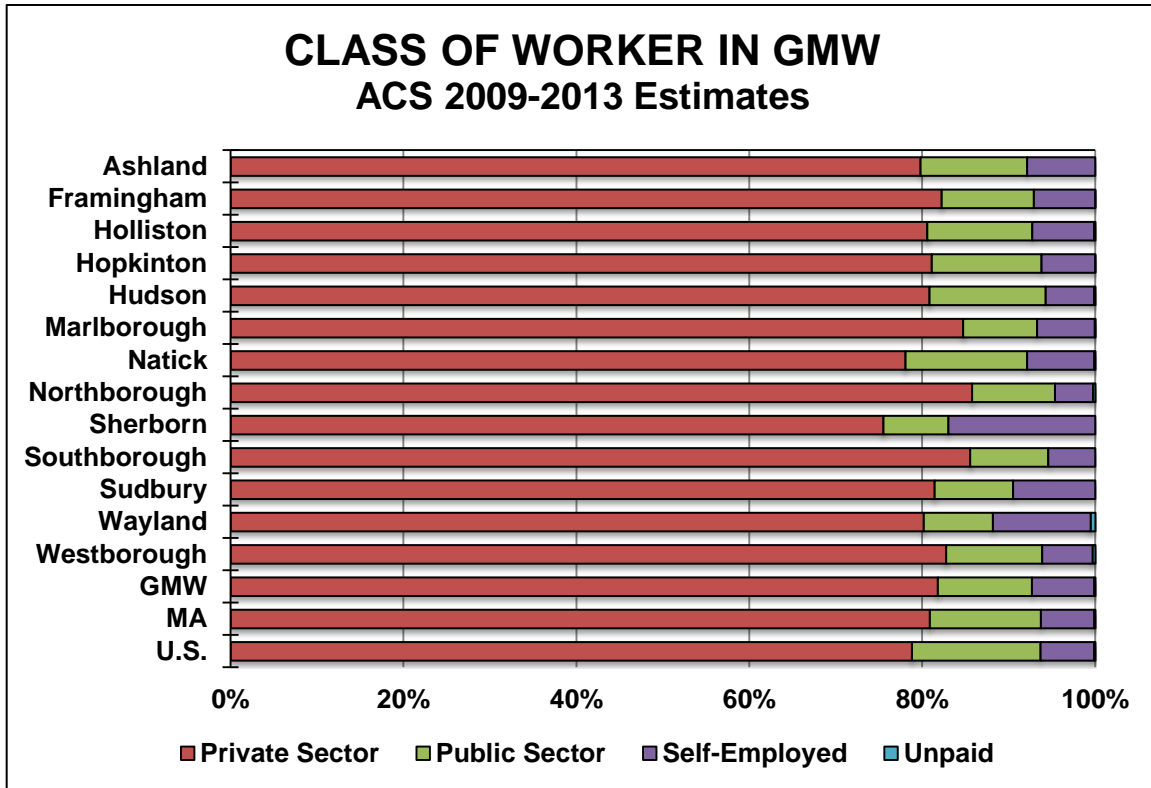
GMW MEAN TRAVEL TIME TO WORK ACS 2009-2013 Estimates



Source: Census 2000, ACS 2009-2013 and MERC



GREATER METROWEST – LABOR FORCE CHARACTERISTICS



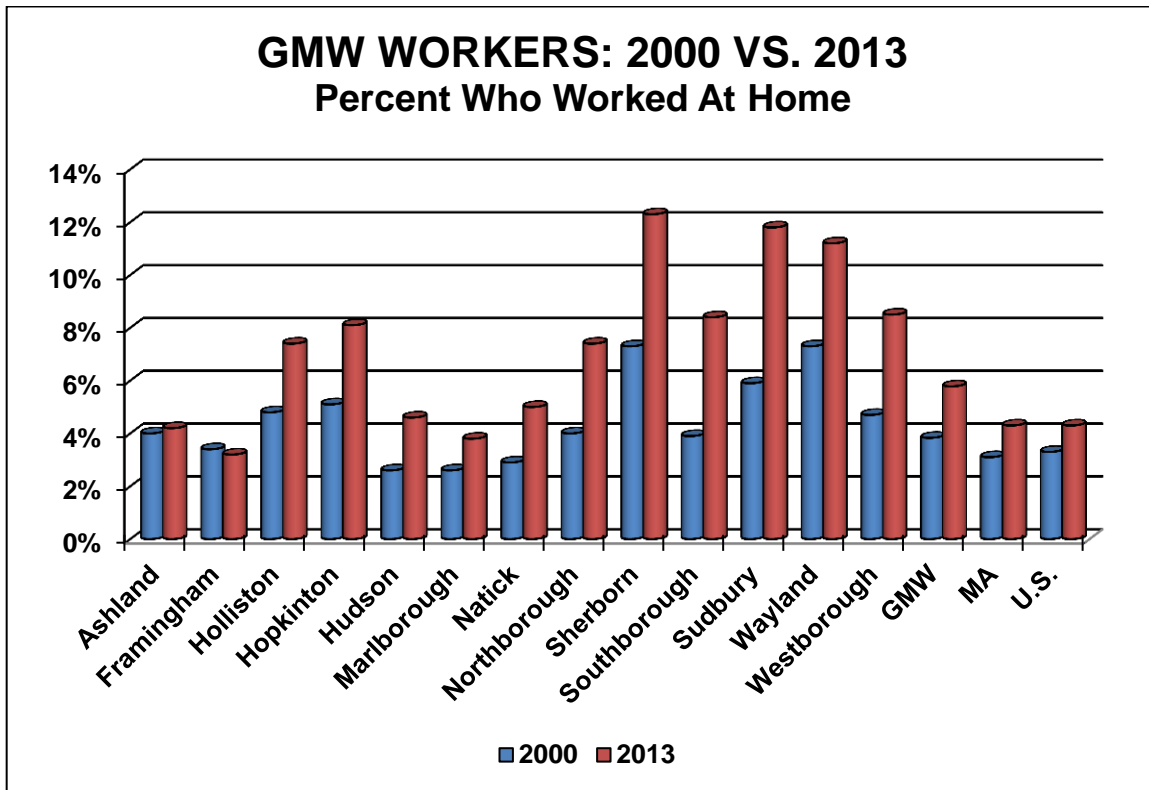
Source: ACS 2009-13 and MERC

Employees aged 16 years and over are more likely to work in the private sector in Greater MetroWest (GMW) at 81.8% than in the state, 80.9%, or the nation, 78.8%. This is displayed in red on the graph. GMW workers were less likely to work in the public sector at 10.9%, than in the state and nation, at 12.8% and 14.9%, respectively. This can be seen in green. Displayed in purple, GMW has a greater portion of self-employed people than in Massachusetts and the U.S. Self-employed workers account for 7.2% of GMW’s total employees. This can be compared to 6.2% in the state and nation. This value for the region’s communities ranged from 4.4% in Northborough to 17% in Sherborn, or 1 in 6 workers in Sherborn.

Community	Employed Persons (16+)	Private Sector	Public Sector	Self-Employed	Unpaid
GMW	149,556	122,331	16,298	10,782	145
MA	3,308,547	2,675,474	424,978	204,585	3,510
U.S.	141,864,697	111,790,351	21,087,459	8,775,721	211,166



GREATER METROWEST – LABOR FORCE CHARACTERISTICS



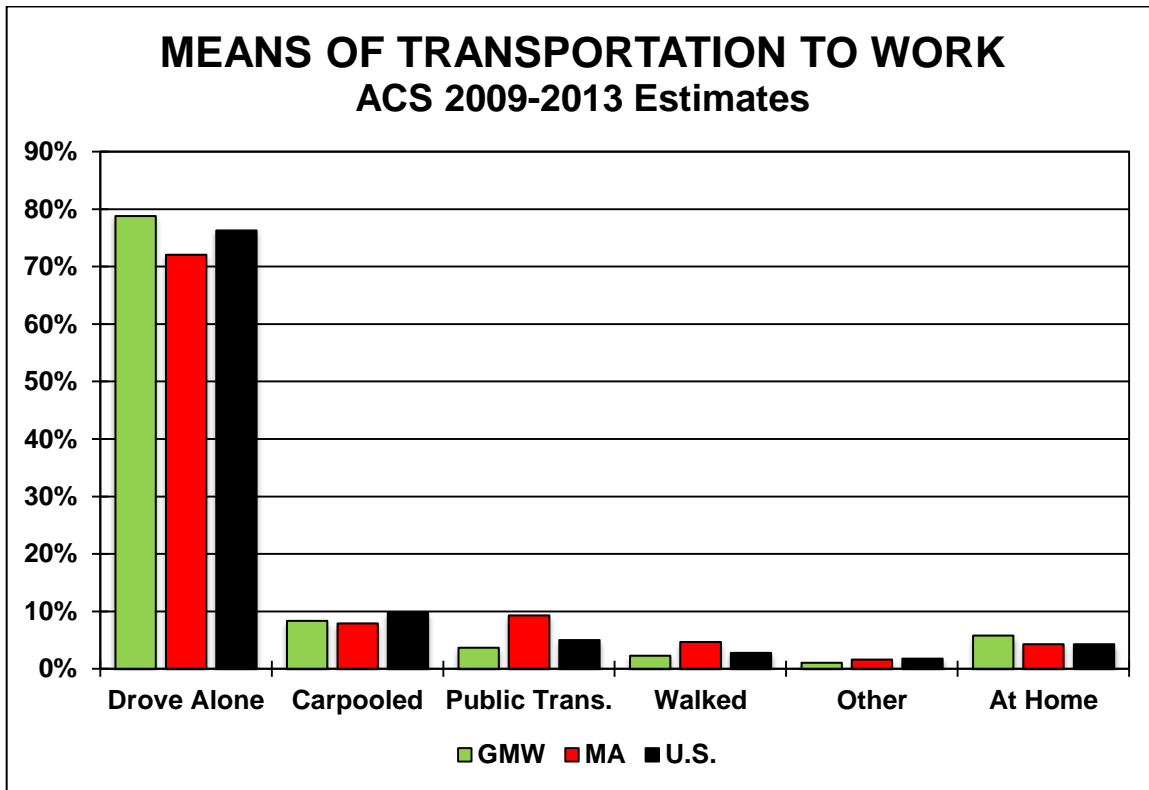
Source: Census 2000 (SF3) and ACS 2009-13 and MERC

From 2000 to 2013, there has been an increase in workers aged 16 years and over who work at home in the United States, Massachusetts, Greater MetroWest (GMW) and in most GMW communities. Only Framingham experienced a decline over time in the percentage of at home workers, going from 3.4% in 2000 to 3.2% in 2013. About 5.8% of GMW workers performed their job at home in 2013, up from 3.8% in 2000. Comparable 2013 rates of at home workers were 4.3% both in the state and nation. In 2013, three of GMW communities had percentages greater than 10% for at home workers. Sherborn had the highest percentage with 12.3% of employees who worked at home. Sudbury and Wayland shortly followed, with 11.8% and 11.2%, respectively.

Community	Workers (16+)	At Home	% At Home	Workers (16+)	At Home	% At Home
	2000	2000	2000	2013	2013	2013
GMW	140,438	5,382	3.8%	147,014	8,499	5.8%
MA	3,102,837	97,504	3.1%	3,239,623	140,256	4.3%
U.S.	128,279,228	4,184,223	3.3%	139,786,639	6,046,385	4.3%



GREATER METROWEST – LABOR FORCE CHARACTERISTICS

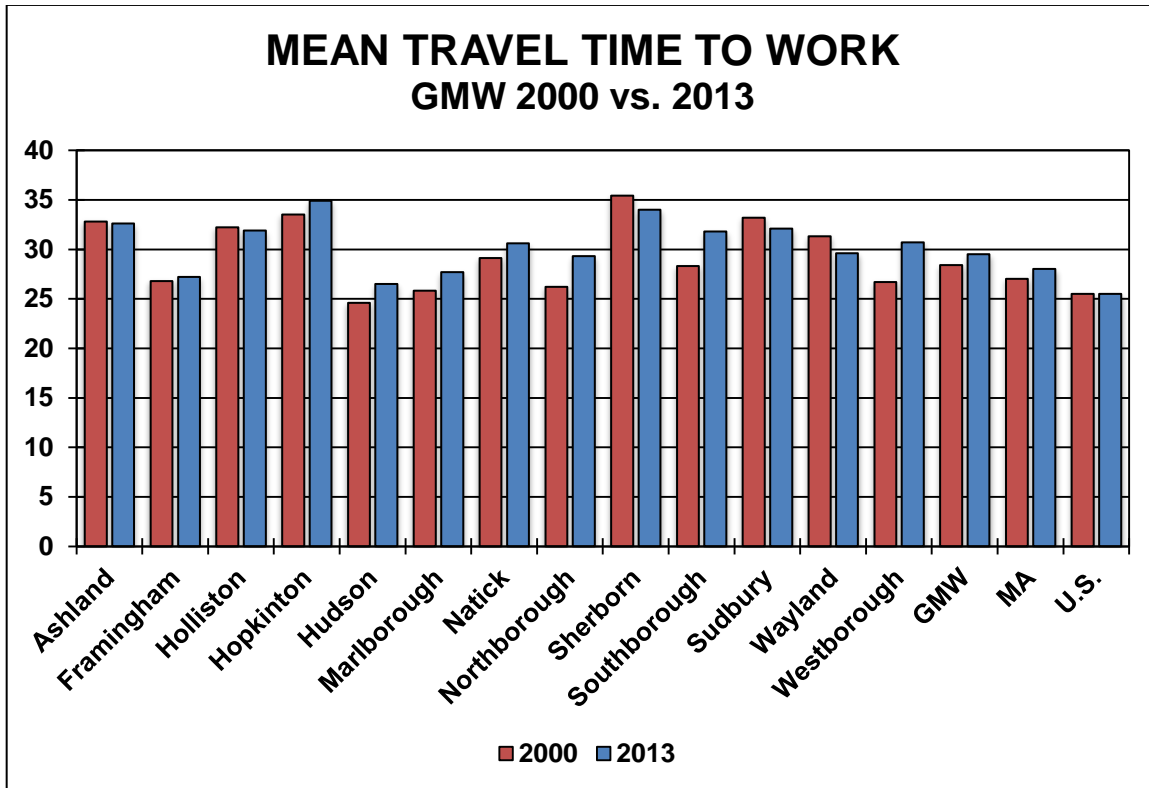


Source: ACS 2009-13 and MERC

About 79% of Greater MetroWest (GMW) workers aged 16 years and over drove to work alone. This was a greater proportion than of the state, at 72%, and the nation, at 76%. About 8% of workers carpooled in GMW and Massachusetts. The United States had a greater percentage of carpooling workers, almost 10%. The percentage of workers who took public transportation and walked to work in GMW falls short when compared to the state and nation. The proportion of GMW workers, who worked at home, 5.8%, is greater than that of the Commonwealth and the United States, both at 4.3%.

	GMW	MA	U.S.
Population (16+)	224,362	5,371,252	246,191,954
Workers (16+)	147,014	3,239,623	139,786,639
% Drove Alone	78.8%	72.1%	76.3%
% Carpooled	8.4%	7.9%	9.8%
% Public Trans.	3.7%	9.3%	5.0%
% Walked	2.3%	4.7%	2.8%
% Other	1.1%	1.6%	1.8%
% At Home	5.8%	4.3%	4.3%

GREATER METROWEST – LABOR FORCE CHARACTERISTICS



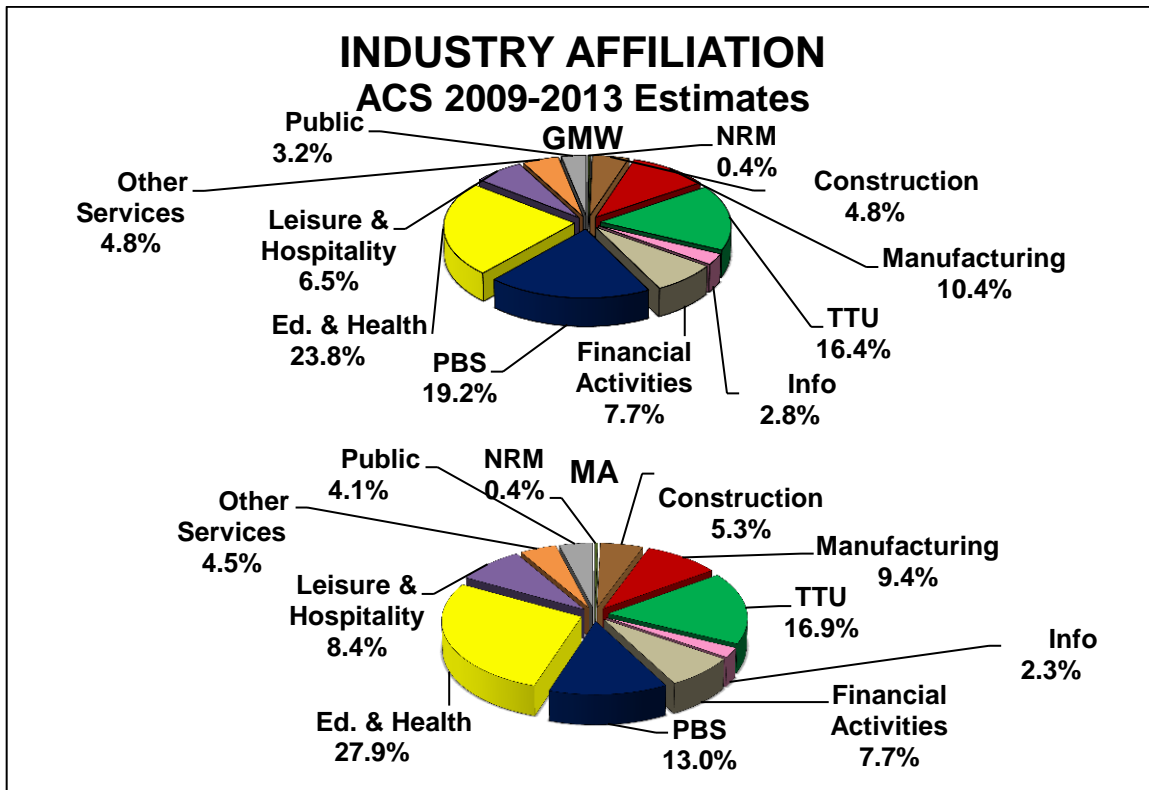
Source: Census 2000 (SF3) and ACS 2009-13 and MERC

Greater MetroWest (GMW) workers spend more time commuting to work than their state and national counterparts. In 2013, the mean travel time for GMW workers was 29.5 minutes, 1.5 minutes longer than for Massachusetts workers and 4 minutes longer than for workers in the United States. Throughout the years, the mean travel time for GMW and Massachusetts workers has increased, while in the United States it has remained the same. Throughout the GMW communities, most mean travel times have also increased, except for the towns of Ashland, Holliston, Sherborn, Sudbury and Wayland.

Communities	Mean Travel Time	
	2000	2013
GMW	28.4	29.5
MA	27.0	28.0
U.S.	25.5	25.5



GREATER METROWEST – LABOR FORCE CHARACTERISTICS

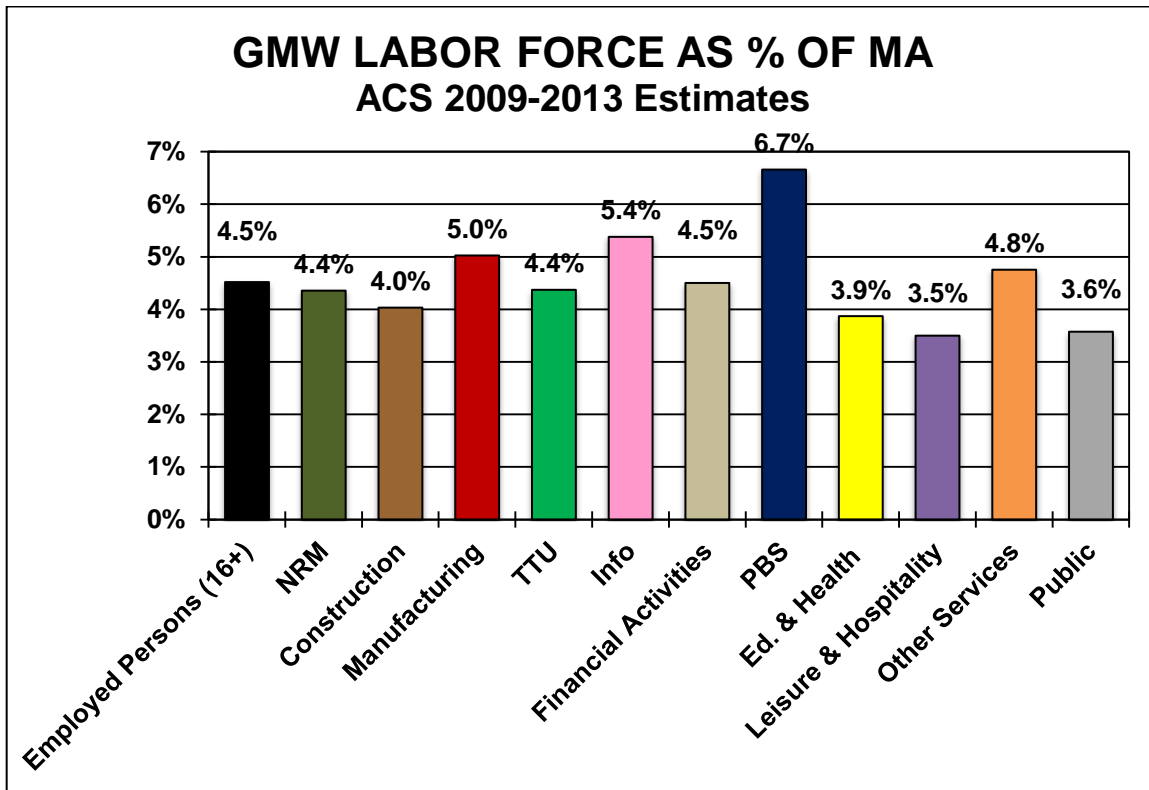


Source: ACS 2009-13 and MERC

The industry affiliations of employed persons 16 years and over in Greater MetroWest (GMW) are proportionately similar to the industry affiliations in the Commonwealth with two notable exceptions. More than 19% of GMW workers, or one in five, are affiliated with the Professional and Business Services (PBS) industry, compared to 13% in Massachusetts. The Educational and Health Services industry accounts for 23.8% of GMW employees, or one in four, compared to 27.9% for the state.

Industry Affiliations	GMW	MA	U.S.
Natural Resources & Mining (NRM)	553	12,691	2,731,302
Construction	7,133	176,818	8,864,481
Manufacturing	15,611	310,577	14,867,423
Trade, Transportation & Utilities (TTU)	24,562	561,646	27,363,730
Information	4,160	77,307	3,056,318
Financial Activities	11,488	255,085	9,469,756
Professional & Business Services (PBS)	28,739	431,414	15,300,528
Education & Health Services	35,578	918,826	32,871,216
Leisure & Hospitality Services	9,763	278,905	13,262,892
Other Services	7,127	149,870	7,043,003
Public	4,842	135,408	7,034,048
Employed persons 16+	149,556	3,308,547	14,186,697

GREATER METROWEST – LABOR FORCE CHARACTERISTICS

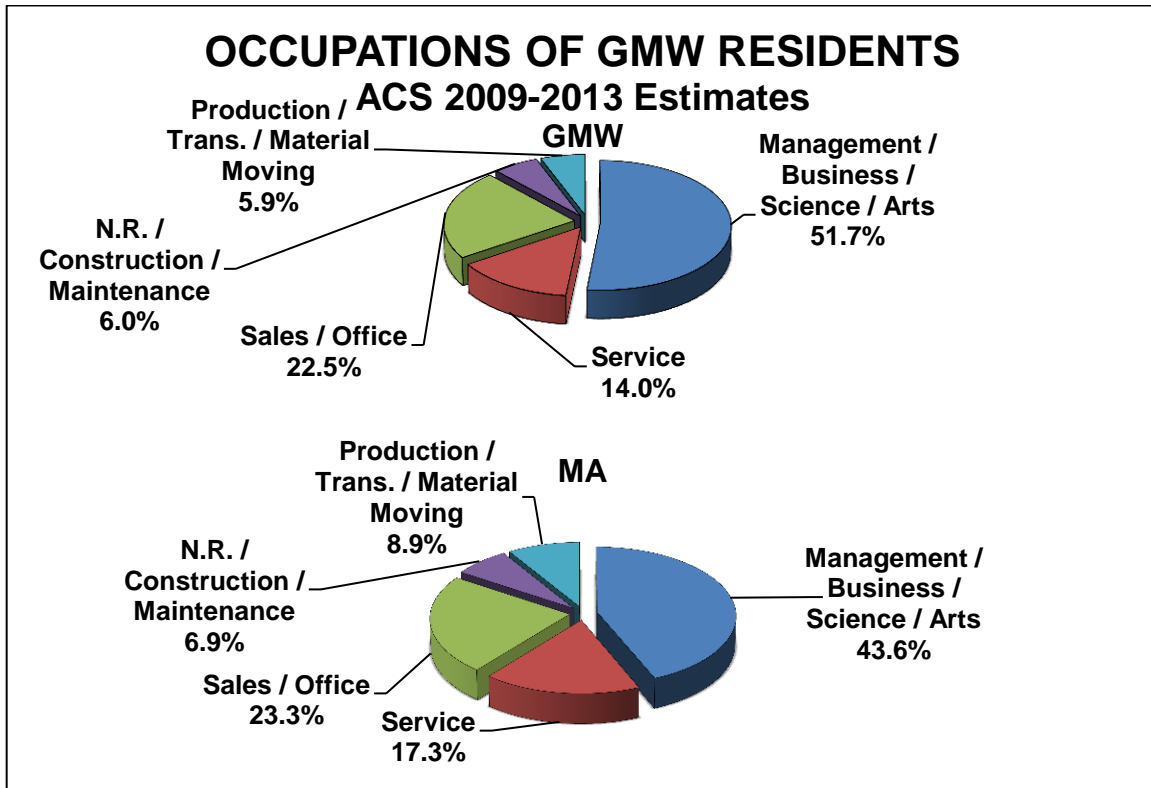


Source: ACS 2009-13 and MERC

Greater MetroWest (GMW) is home to about 4.5% of all Massachusetts employed persons aged 16 years and over. The region's residents comprise 6.7% of workers in the state's Professional and Business Services (PBS), and 5.4% of workers in the Commonwealth's Information industry. Other industries in which GMW residents constitute 4.5% or more of industry workers include Manufacturing, Other Services, and Financial Activities.

Industry Affiliations	GMW	GMW Labor Force as % of MA	MA
Employed Persons (16+)	149,556	4.5%	3,308,547
Natural Resources and Mining (NRM)	553	4.4%	12,691
Construction	7,133	4.0%	176,818
Manufacturing	15,611	5.0%	310,577
Trade, Transportation & Utilities (TTU)	24,562	4.4%	561,646
Information	4,160	5.4%	77,307
Financial Activities	11,488	4.5%	255,085
Professional & Business Services (PBS)	28,739	6.7%	431,414
Education & Health Services	35,578	3.9%	918,826
Leisure & Hospitality Services	9,763	3.5%	278,905
Other Services	7,127	4.8%	149,870
Public	4,842	3.6%	135,408

GREATER METROWEST – LABOR FORCE CHARACTERISTICS



Source: ACS 2009-13 and MERC

More than half of employed regional workers are in management and professional occupation categories, or 51.7%. This compares to 43.6% for the state and 36.2% for the nation. Greater MetroWest (GMW) employees are less likely than the state and nation to be in service, sales and office, construction, and production occupations.

	GMW	MA	U.S.
Employed Persons (16+)	149,556	3,308,547	141,864,697
Management/Business/Science/Arts	51.7%	43.6%	36.2%
Service	14.0%	17.3%	18.1%
Sales/Office	22.5%	23.3%	24.6%
Natural Resources/Construction/Maintenance	6.0%	6.9%	9.1%
Production/Transportation/Material Moving	5.9%	8.9%	12.0%

APPENDIX

This report uses U.S. Census data from both the Census 2000 and Census 2010, and from the American Community Survey (ACS) 2009-2013 estimates.

The 2000 Census of Population and Housing was conducted in the spring of 2000 and refers to population and housing characteristics in place on April 1, 2000 while the 2010 Census of Population and Housing was conducted in the spring of 2010 and refers to population and housing characteristics on April 1, 2010. The ACS 2009-2013 estimates were released in December 2014.

The U.S. Census Bureau reports that the Census data (2000 and 2010) is compiled from questions asked of all people and every housing unit; hence it is called 100% data. For example, the demographic profile includes data on sex, age, race, Hispanic or Latino, household relationship, household type, group quarters population, housing occupancy, and housing tenure for all persons and households. For the ACS estimates, this publication uses the point estimates; the corresponding margins of error are reported on the Census website.

The definitions of most data categories used in this report are straightforward, and can be found on the U.S. Census site. Care must be used when using data recording ethnicity and race. All respondents self-identify in the ethnic and racial categories. The Census compiled data on the Total Population for Race and on Hispanic or Latino and Not Hispanic or Latino by Race. Both data sets allowed persons to elect more than one race.

Complete information on the U.S. Census Bureau's definitions, methods and technical documentation can be found on the Census website: www.census.gov

Also, each month the MetroWest Economic Research Center (MERC) at Framingham State University calculates a composite unemployment rate for the Greater MetroWest region which includes MetroWest and the Greater Marlborough Region. The unemployment rate is household-based and reflects the labor market status of the residents of the regions. The information for the rate is obtained from the Massachusetts Executive Office of Labor and Workforce Development (MA EOLWD) which provides monthly estimates of the size of the local labor force, the number of employed and unemployed residents, and the unemployment rates for all Massachusetts cities and towns.

SOURCES

- Bureau of Labor Statistics, U.S. Department of Labor (U.S.B.L.S.)
- U.S. Census Bureau, U.S. Department of Commerce: Census 2000; Census 2010; and ACS 2009-2013 Estimates
- Massachusetts Executive Office of Labor and Workforce Development (MA EOLWD)
- MetroWest Economic Research Center (MERC)

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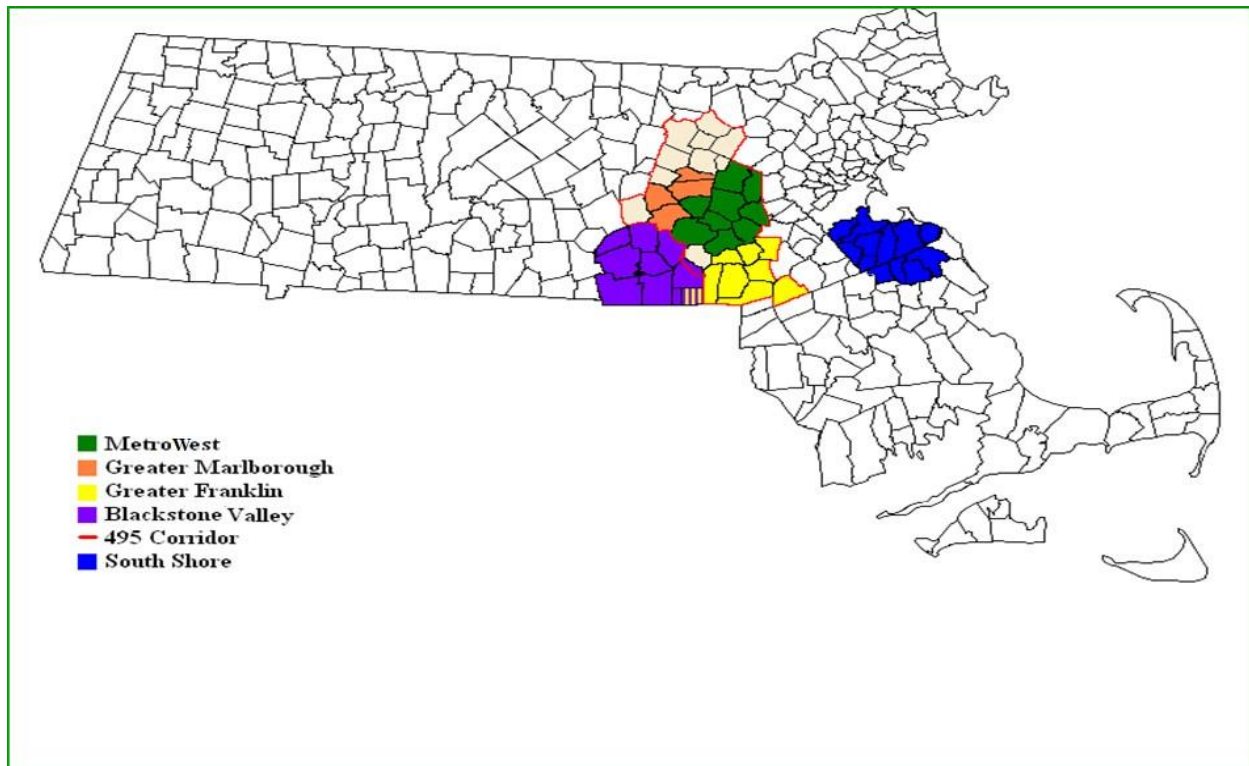
Kristen Hurley, B.S. 2015

Ginger Conti, MERC Office Manager

Professor Donald MacRitchie

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Framingham State University
merc@framingham.edu



Framingham
State University

MetroWest Economic
Research Center

METROWEST ECONOMIC RESEARCH CENTER

at Framingham State University

Towers Hall, 100 State Street, Framingham, MA 01701-9101

508-626-4033 FAX: 508-626-4018

www.merc-online.org