

2015 MERC PUBLICATION

**FRAMINGHAM  
EMPLOYMENT REPORT**



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Prepared for  
**Framingham Community and Economic Development  
Division**

February 2015



**Framingham**  
State University

MetroWest Economic  
Research Center



# Framingham

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## State University

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# FRAMINGHAM EMPLOYMENT REPORT

## INTRODUCTION

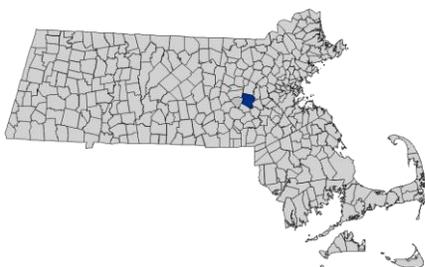
Anchoring the powerful innovation economy of the Greater MetroWest Region\* (GMW), Framingham, the largest of the 13 GMW communities, boasts a highly skilled labor force, high wage employment, and a diversified industrial base built on research and development, corporate headquarters, health services and trade.

With an estimated resident population of 70,448 in 2013, the town of Framingham offers a highly educated, skilled labor force. Half of the population 25 years and older, 49% or 22,200 residents, hold a Bachelor's degree, exceeding Massachusetts (40%) and the U.S. (30%). One-fifth of this population, approximately 9,300 residents, possess a graduate or professional degree, exceeding the state (18%) and nation (11%). In 2013 the Framingham labor force included 38,587 individuals. The 2013 Framingham annual unemployment rate of 5.4% fell well below Massachusetts (7.1%) and the U.S. (7.4%).

Located halfway between Boston and Worcester, Framingham is well serviced by two exits on I-90 (Massachusetts Turnpike), and Routes 9, 30, 126 and 135, Amtrak and MBTA commuter rail train stops, and express bus service from Logan Airport. Framingham provides convenient access for residents, businesses, and employees.

In 2013 Framingham's 2,260 establishments generated 46,600 jobs, a record total payroll of \$3.5 billion, and a record average annual wage of \$74,700. Framingham ranked first in the region in employment, payroll and establishments and fourth highest in average wage.

A highly diversified economy, five different industry supersectors: Professional and Business Services, Education and Health, Trade, Transportation, and Utilities, Public and Manufacturing produce over 80% of the town's employment and payroll. Framingham establishments range from corporate headquarters of Staples, TJX, and Gulf-Cumberland, to science and engineering leaders Genzyme and BOSE, startups like Boston Heart Diagnostics and Jack's Abby Brewery, the Shoppers World retail trade center, and medical and educational institutions like MetroWest Medical Center, Framingham State University, and Mass Bay Community College.



This *Framingham Employment Report*, prepared for the Framingham Division of Community and Economic Development and the Framingham EDIC, includes the most recent annual data for the town of Framingham on employment, payroll, wages and establishments as well as comparisons with the region and state.

The MetroWest Economic Research Center (MERC) at Framingham State University creates and maintains economic databases on a number of city, town, and regional economies in the state. For more information, please contact MERC.

\*The Greater MetroWest Region (GMW) includes: Ashland, Framingham, Holliston, Hopkinton, Hudson, Marlborough, Natick, Northborough, Sherborn, Southborough, Sudbury, Wayland, Westborough.

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# FRAMINGHAM EMPLOYMENT REPORT

## UNDERSTANDING EMPLOYMENT DATA<sup>1</sup>

The MetroWest Economic Research Center (MERC) at Framingham State University maintains an employment database for the MetroWest CCSA™, the Greater Marlborough Region, the South Shore CCSA™, the 495/MetroWest Region, and other substate economies. MERC has documented remarkable growth in regional employment and wages as well as major changes in industrial structure and employment since 1980. For this 2015 publication MERC has developed employment data for the town of Framingham.

MERC research relies on the Massachusetts Executive Office of Labor and Workforce Development (MA EOLWD) ES-202 series to develop time series for employment, payroll, wages and establishments in Framingham. ES-202 data are derived from quarterly census reports filed by all employers subject to unemployment laws, both state and federal, and cover 98% of all U.S. jobs. More than 150,000 MA employers subject to unemployment compensation laws participate in the quarterly census.

For the first time in 2002 employers were classified by industry solely in accordance with the North American Industry Classification System (NAICS). NAICS groups together establishments that use the same processes to produce goods and services. NAICS permanently replaced the Standard Industrial Classification (SIC) system which was in use for the previous 70 years. Because the criteria for the classification of establishments differs between NAICS and the SIC system, time series data for industrial sectors prior to 2001 cannot be provided. For a more detailed description of NAICS categories as used in this publication, please see the Appendix.

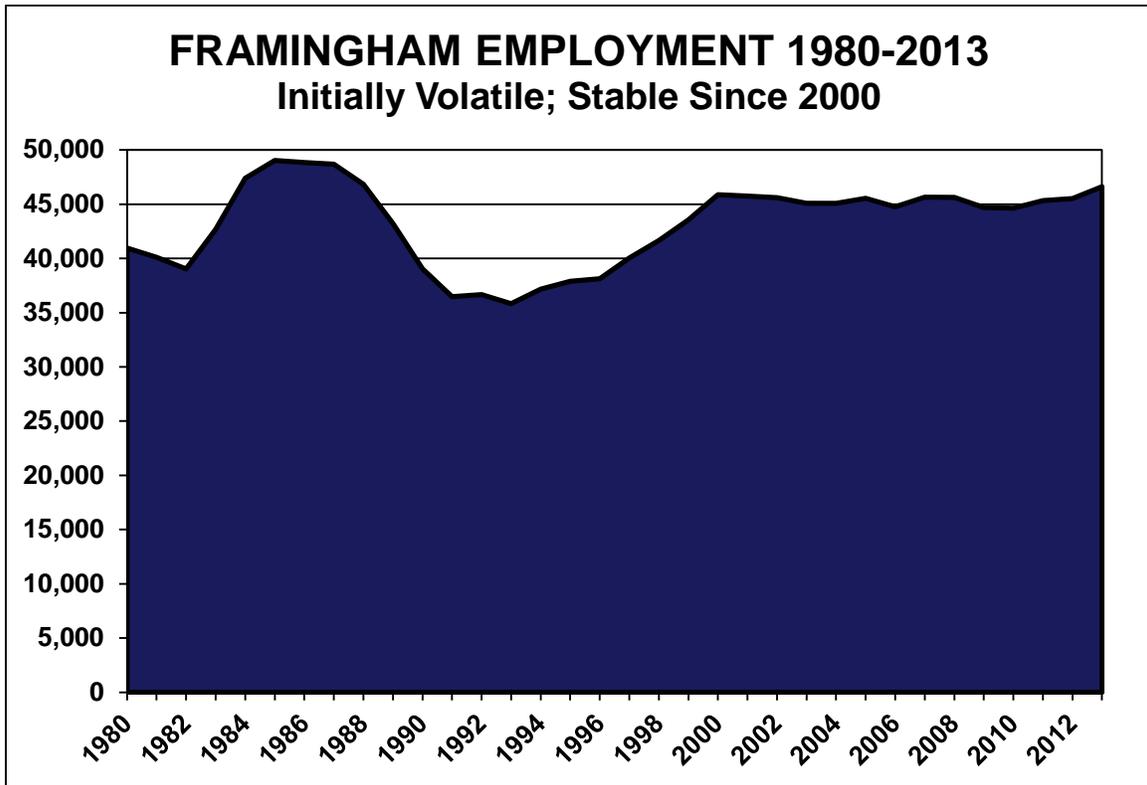
In the ES-202 series **employment** refers to the count of all persons on the payroll of establishments subject to the law, who worked full-time or part-time for establishments sited within Framingham. Annual **payroll** includes all wages and salaries paid to covered employees including commissions, bonuses, stock options, overtime and sick pay. The **average annual wage** is derived by dividing the gross annual payroll by the average annual employment. **Establishment** or place of work refers to an economic unit that produces goods or services at a single location and is engaged in one type of economic activity. A firm, therefore, may have one or more establishments where work is produced. More complete definitions are included in the Appendix.

Please note that data and analysis included in this report refer to business establishments, *not* residents, located within Framingham or a larger region. Please also note that totals may not always add due to rounding.

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<sup>1</sup>The definitions of terms are based on those in the *Handbook of U.S. Labor Statistics* (1998), *Employment and Wages in Massachusetts and the Major Metropolitan Statistical Areas Annual Averages 1993-1996*, the *North American Industry Classification System - United States, 2002*, [www.bls.gov/cew](http://www.bls.gov/cew), and MA EOLWD, *Employment and Wages by Industry and Area (ES202)*.

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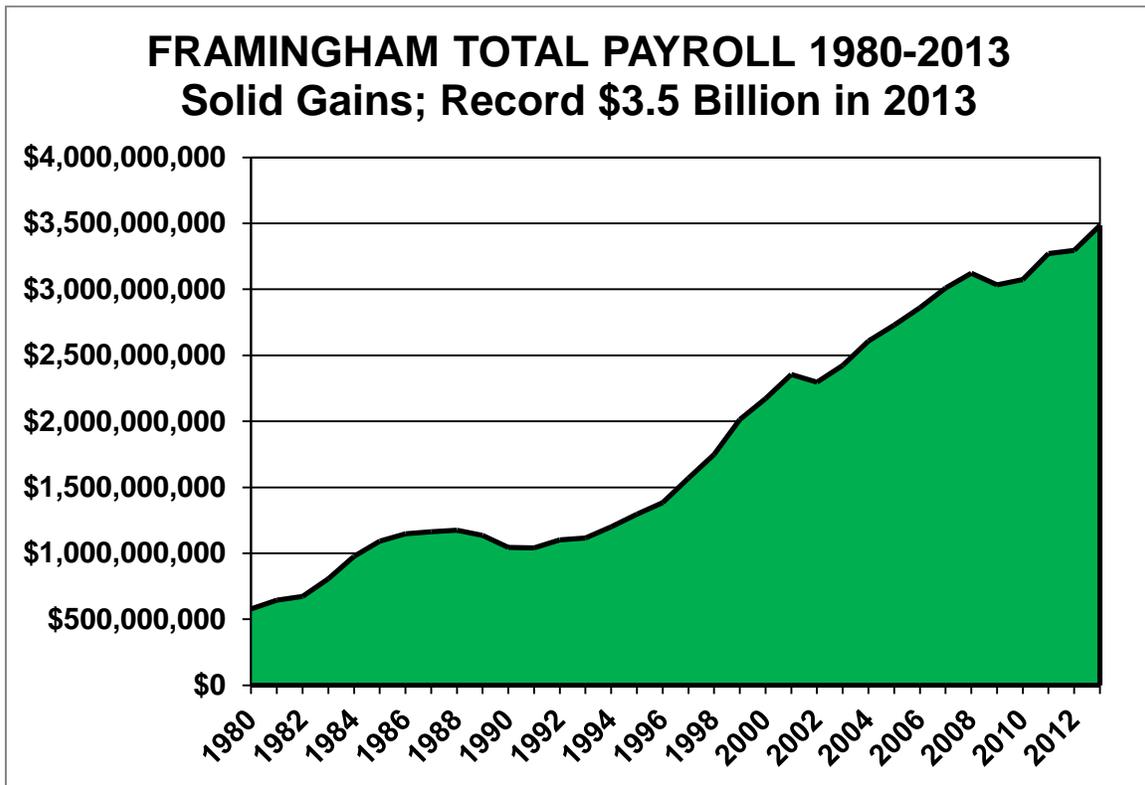


Source: MA EOLWD, MERC

- Total Framingham employment rose from 40,950 jobs in 1980 to 46,620 jobs in 2013, a gain of 5,660 jobs or 14%.
- Over the period Framingham employment grew at an average annual rate of 0.4%, lower than the Greater MetroWest Region (GMW) (1.4%), Massachusetts (0.7%), and U.S. (1.2%) rates of growth.
- Framingham experienced two distinct periods of volatility and stability. Employment soared 26% from 39,030 in 1982 to its historical peak of 49,030 jobs in 1985, then fell 27% to its historical low of 35,830 jobs in 1993. After rising to 45,880 jobs in 2000, Framingham employment has remained relatively stable for over a decade.
- In 2013 Framingham employment reached 46,620 jobs, its highest level of employment in 25 years.

Year	Number of Jobs	Year	Number of Jobs
1980	40,950	2000	45,880
1985	49,030 (high)	2005	45,540
1990	39,050	2010	44,630
1993	35,830 (low)	2013	46,620
1995	37,890		

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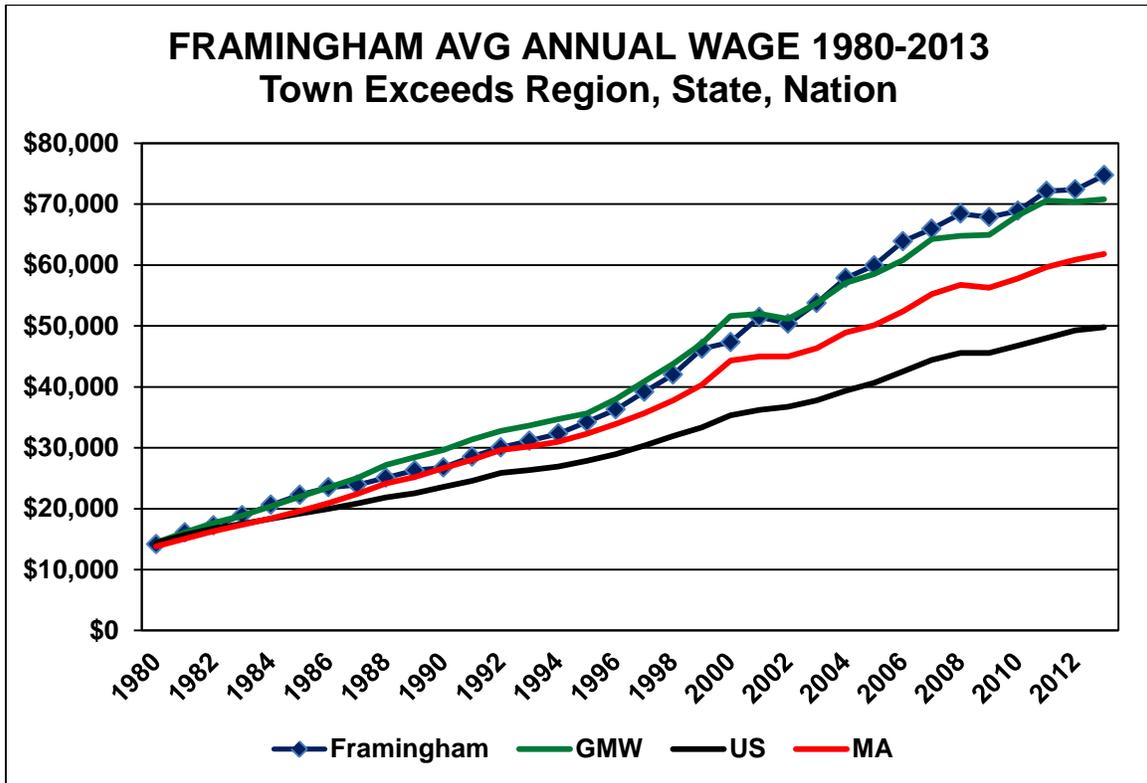


Source: MA EOWLD, MERC

- Framingham total nominal payroll, or payroll not corrected for inflation, climbed from \$579 million in 1980 to a record \$3.5 billion in 2013, a 502% or a sixfold increase over 3 decades, exceeding the percentage gains in the state and national payrolls of 468% and 420%, respectively.
- Framingham total nominal payroll grew at an annual average rate of 5.6%, lower than the Greater MetroWest Region (GMW) rate of 6.5%, but higher than the Massachusetts rate and U.S. rates of 5.4% and 5.1%, respectively.
- Over the 33 years total Framingham payroll rose steadily with the three declines in total payroll occurring in 1989-91, 2001, and 2008 during recessions.

Year	Total Payroll	Year	Total Payroll
1980	\$579 million (low)	2000	\$2.2 billion
1985	\$1.1 billion	2005	\$2.7 billion
1990	\$1 billion	2010	\$3.1 billion
1995	\$1.3 billion	2013	\$3.5 billion (high)

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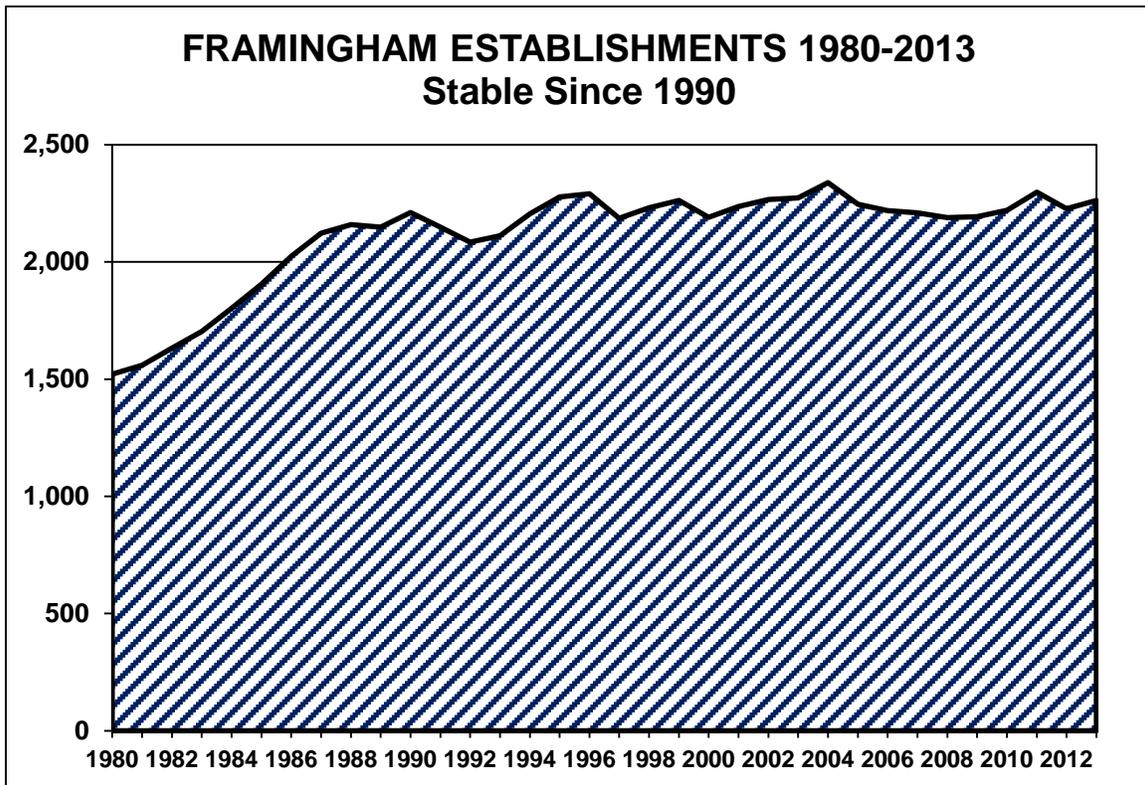


Source: MA EOLWD, MERC

- For three decades the Framingham average annual wage exceeded those of the state and nation, and since 2004 exceeded the Greater MetroWest Region (GMW) average annual wage.
- The Framingham average annual wage rose from \$14,100 in 1980 to a record \$74,700 in 2013, a gain of 429%. The Framingham average wage rose at a 5.2% annual rate, exceeding the region (4.9%), state (4.6%) and nation (3.8%).
- In 2013 the Framingham average annual wage exceeded the GMW average wage by 6%, the MA average wage by 21% and the U.S. average annual wage by 50%.
- In 2013 Framingham establishments offered the fourth highest average annual wage among the 13 GMW communities.

Year	Framingham	GMW	MA	US
1980	\$14,100	\$14,400	\$13,800	\$14,400
1990	\$26,800	\$29,600	\$26,700	\$23,600
2000	\$47,300	\$51,600	\$44,300	\$35,300
2010	\$68,900	\$68,200	\$57,800	\$46,800
2013	\$74,700 (high)	\$70,800	\$61,800	\$49,800

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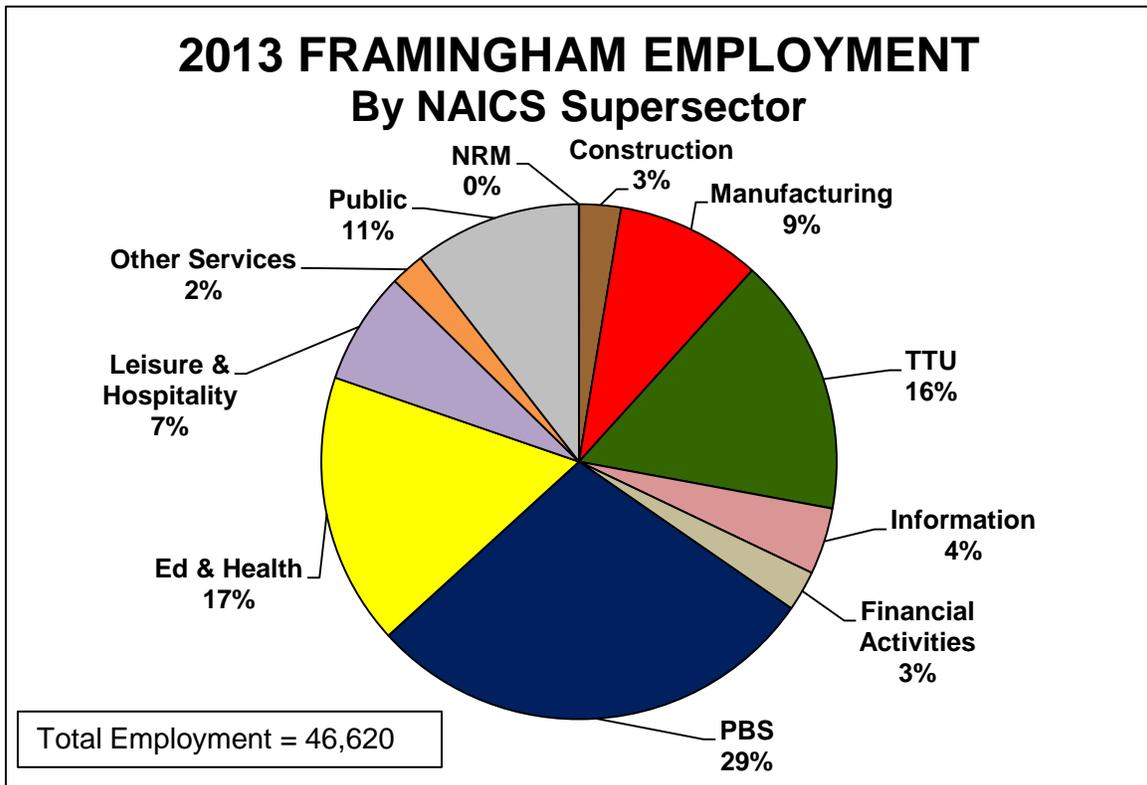


Source: MA EOLWD, MERC

- The total number of Framingham establishments or separate places of work rose from 1,520 establishments in 1980 to 2,260 establishments in 2013, a gain of 49%.
- Much of the increase in Framingham establishments occurred during 1980-90. Since 1990 the number of Framingham establishments has oscillated around 2,200 with the historical peak of 2,340 reached in 2004.
- Over the entire period the number of Framingham establishments climbed at a 1.2% average annual rate, lower than the rates of the Greater MetroWest Region (GMW) (2.3%), state (1.9%) and nation (2%).
- In 1980 nearly one-third, or 32%, of all GMW establishments were located in Framingham. By 2013 over one-fifth of GMW establishments, or 22%, were sited in Framingham.

Year	Number of Establishments	Year	Number of Establishments
1980	1,520 (low)	2005	2,250
1990	2,210	2010	2,220
2000	2,190	2013	2,260
2004	2,340 (high)		

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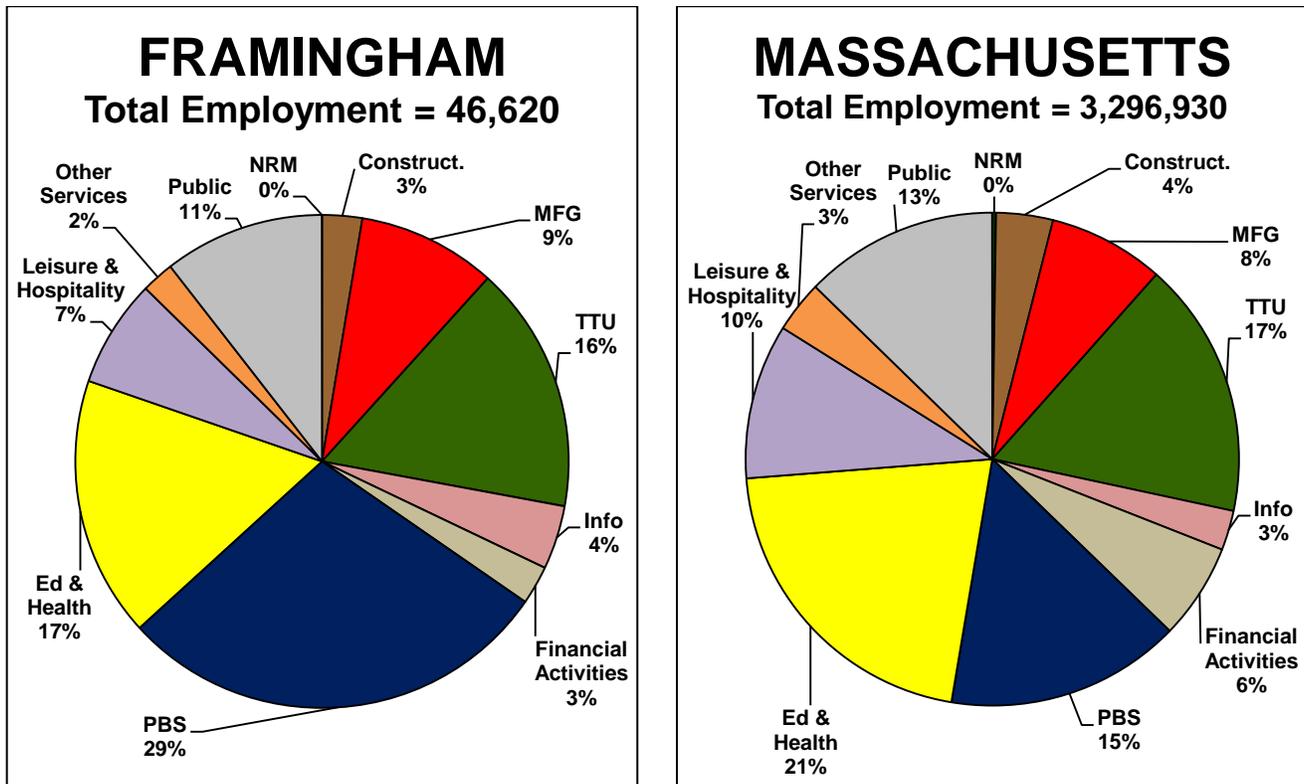
Source: MA EOLWD, MERC

- In 2013 Framingham employment totaled 46,620 jobs, an increase of 1,100 jobs, or 2.4%, from 2012.
- Professional and Business Services (PBS) generated the highest percentage of Framingham employment at 29% or 13,330 jobs, followed by private sector Education and Health at 17% or 7,960 jobs and Trade, Transportation, and Utilities (TTU) at 16% or 7,660 jobs.
- Five supersectors: PBS, Education and Health, TTU, Public and Manufacturing combined to produce over 80% or four-fifths of total Framingham employment.

Supersector	Employment	Supersector	Employment
PBS	13,330	Information	1,950
Education & Health	7,960	Financial Activities	1,180
TTU	7,660	Construction	1,220
Public	4,900	Other Services	1,000
Manufacturing	4,230	Natural Resources (NRM)	7
Leisure & Hospitality	3,300	<b>Total Framingham</b>	<b>46,620</b>

## FRAMINGHAM EMPLOYMENT REPORT

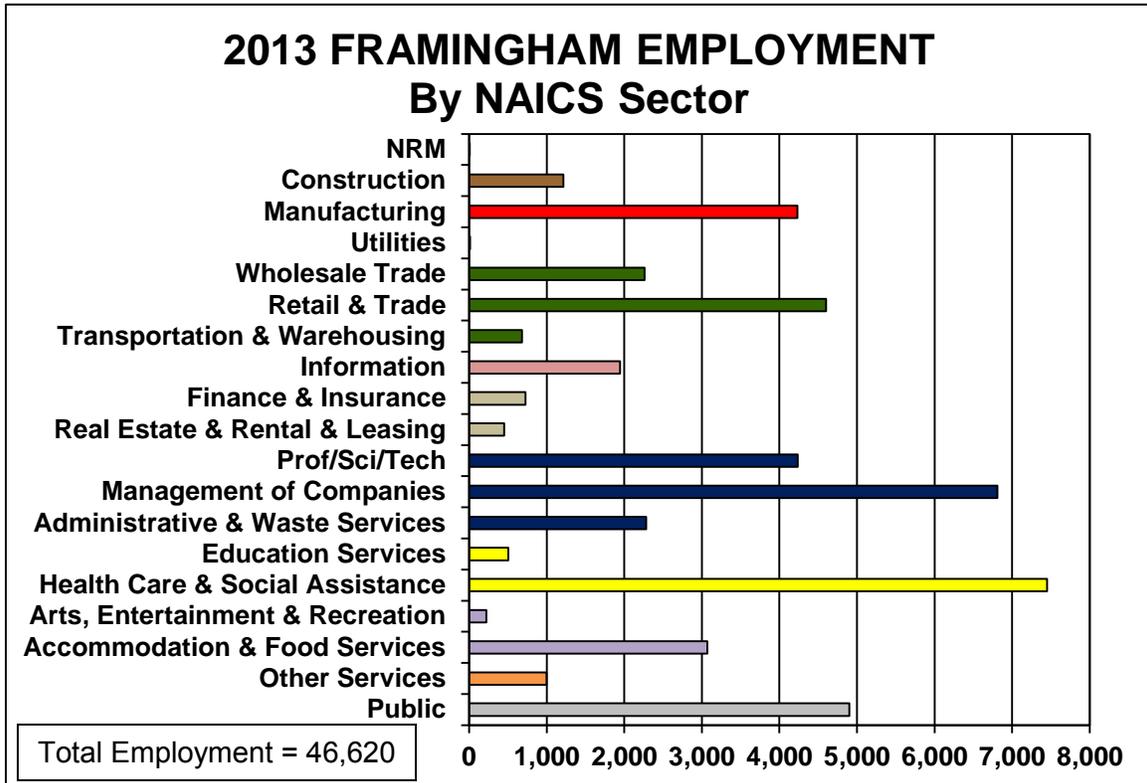
### 2013 EMPLOYMENT BY NAICS SUPERSECTORS Framingham vs. MA



Source: MA EOLWD, MERC

- In 2013 Framingham employment totaled 46,620 jobs, up 2.4% from 2012. In contrast, Massachusetts employment totaled 3,296,930 jobs in 2013, up 1.6% from the previous year.
- Three NAICS supersectors generated 62% of total Framingham employment: Professional and Business Services (PBS) (29%), Education & Health (17%) and Trade Transportation & Utilities (TTU) (16%).
- In Massachusetts four NAICS supersectors dominated state employment generating two-thirds of the state's total employment. These supersectors included Education & Health (21%), TTU (17%), PBS (15%), and Public (13%).
- Three supersectors: Manufacturing, Information, and PBS produced higher percentage shares of community employment than state employment in 2013.
- In 2013 Massachusetts had higher percentage shares of employment compared to Framingham in seven supersectors: Construction, TTU, Financial Activities, Education & Health, Leisure & Hospitality, Other Services, and Public.

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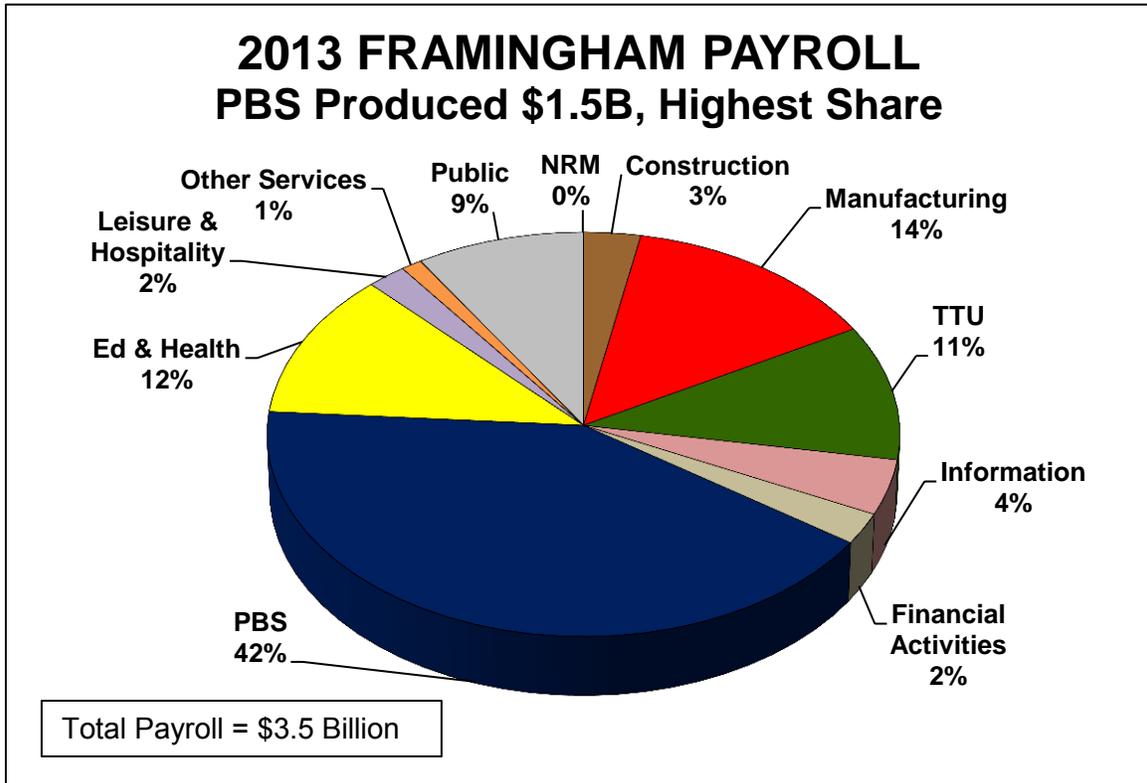
Source: MA EOLWD, MERC

- The NAICS supersectors are also further subdivided into 19 NAICS sectors shown here.
- In 2013 Framingham employment totaled 46,620 jobs. Among the 19 NAICS sectors Health Care & Social Assistance (HC&SA) produced the largest number of jobs, 7,450 or 16% of Framingham employment. Management of Companies, the second largest sector, followed with 6,810 jobs or 15%.
- Six NAICS sectors: HC&SA, Management of Companies, Public, Retail Trade, Professional, Scientific and Technical (Prof/Sci/Tech), and Manufacturing generated 32,230 jobs or 69% of total employment.
- The remaining NAICS sectors each supplied fewer than 3,100 jobs.

NAICS Sector	Number of Jobs	Percentage of Total
Health Care & Social Assistance	7,450	16%
Management of Companies	6,810	15%
Public	4,900	11%
Retail Trade	4,600	10%
Prof/Sci/Tech	4,240	9%
Manufacturing	4,230	9%

Note: Complete NAICS sector data is on page 28.

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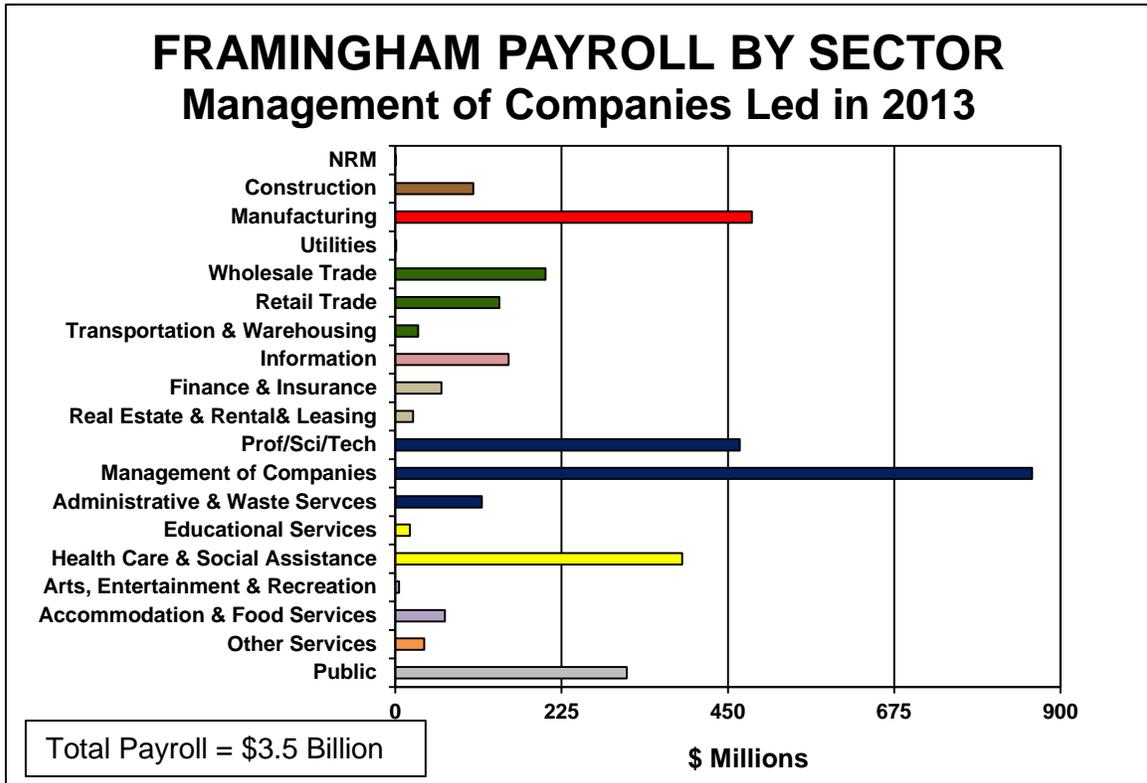


Source: MA EOLWD, MERC

- In 2013 Framingham payroll totaled \$3.5 billion, up 6% from 2012.
- Among the NAICS supersectors Professional and Business Services (PBS) dominated, contributing the largest share of payroll, \$1.5 billion (42%), followed by Manufacturing, \$483 million (14%). Combined, these two supersectors generated over 55 % of total Framingham payroll.
- Five supersectors: PBS, Manufacturing, Education & Health, Trade, Transportation & Utilities (TTU) and Public combined to produce 87%, or over four-fifths of total Framingham payroll.
- The remaining six supersectors each supplied less than 5% of total Framingham payroll.

Supersector	Payroll (Millions)	Supersector	Payroll (Millions)
PBS	\$1,445	Construction	\$106
Manufacturing	\$483	Financial Activities	\$87
Education & Health	\$408	Leisure & Hospitality	\$73
TTU	\$377	Other Services	\$39
Public	\$313	Natural Resources	\$0.2
Information	\$153	<b>Total Framingham</b>	<b>\$3,484</b>

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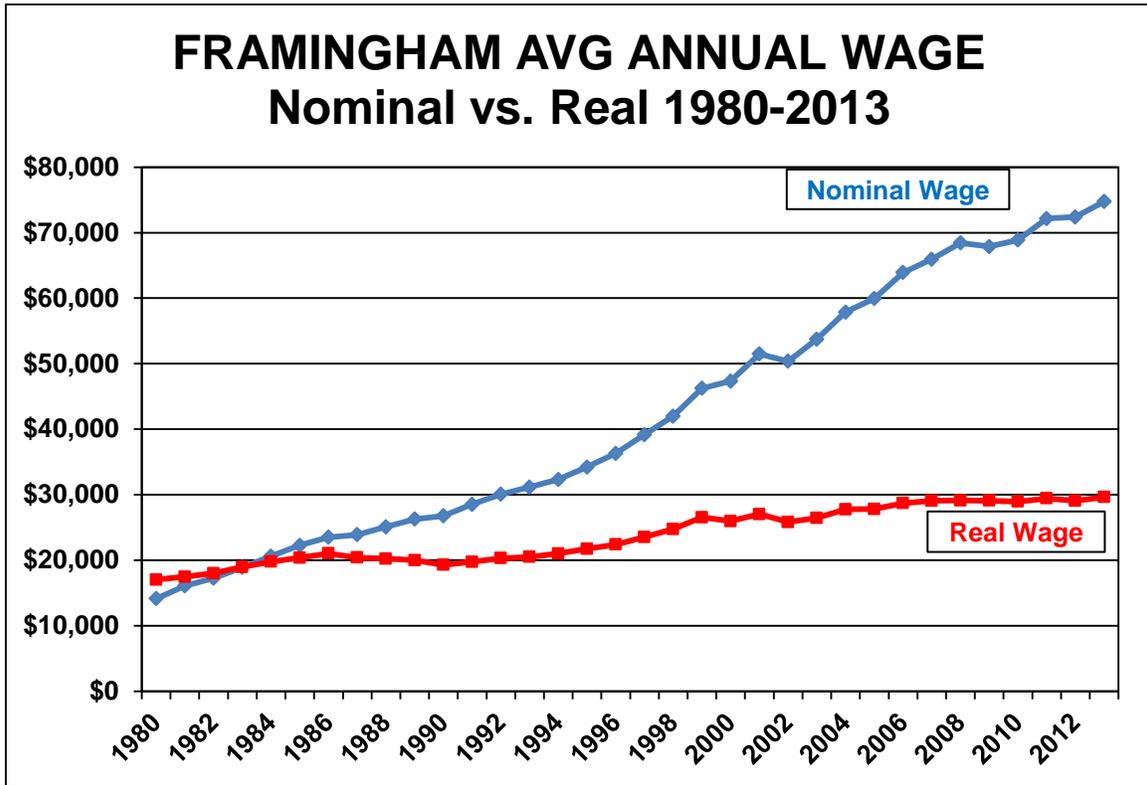
Source: MA EOLWD, MERC

- In 2013 Framingham payroll totaled \$3.5 billion, up 6% from 2012.
- Among the 19 NAICS sectors Management of Companies generated the largest share of payroll in Framingham at \$862 million or 25%, followed by Manufacturing at \$483 million or 14%, and Professional, Scientific and Technical (Prof/Sci/Tech) at \$466 million or 13%.
- These top three payroll sectors produced a combined payroll of \$1.8 billion, over half (52%) of the community's total payroll.
- Health Care & Social Assistance and Public followed at \$388 million and \$313 million, respectively.
- The remaining sectors each contributed less than \$205 million to Framingham payroll.

NAICS Sector	Payroll (Millions)	Percentage of Total
Management of Companies	\$862	25%
Manufacturing	\$483	14%
Prof/Sci/Tech	\$466	13%
Health Care & Social Assistance	\$388	11%
Public	\$313	9%

Note: Complete NAICS sector data is on page 28.

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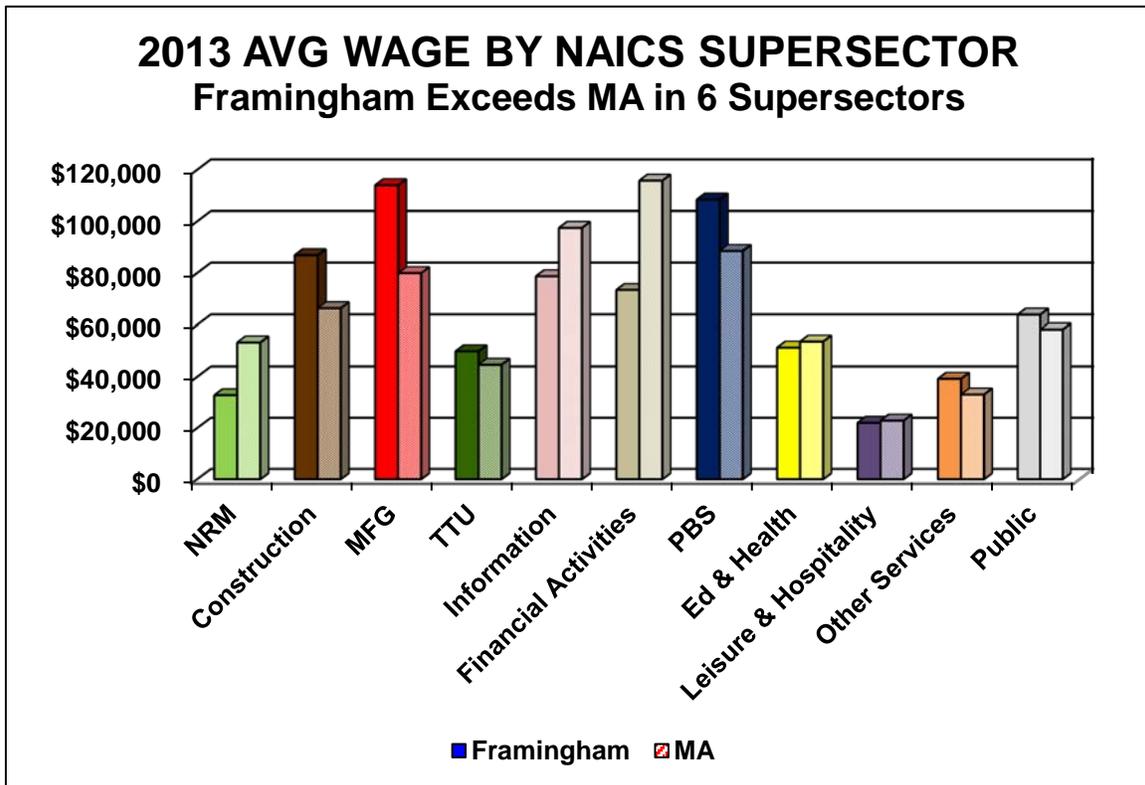


Source: U.S. BLS, MA EOLWD, MERC

- Framingham’s nominal average annual wage rose from \$14,100 in 1980 to a historical peak of \$74,700 in 2013, a gain of 429%. This wage is not corrected for inflation.
- Framingham’s real average annual wage, or the nominal average wage corrected for inflation, increased from \$17,000 in 1980 to \$29,600 in 2013, a gain of 74%. Framingham’s real wage is calculated using the Boston Consumer Price Index (CPI) for all Urban Wage Earners and Clerical Workers which uses 1982-1984 as the base year in correcting for inflation.
- Both Framingham’s nominal average wage and real average wage reached record highs in 2013.

Framingham	1980	1990	2000	2005	2010	2013
Nominal Wage	\$14,100	\$26,800	\$47,300	\$59,900	\$68,900	\$74,700
Real Wage	\$17,000	\$19,300	\$26,000	\$27,800	\$28,900	\$29,600

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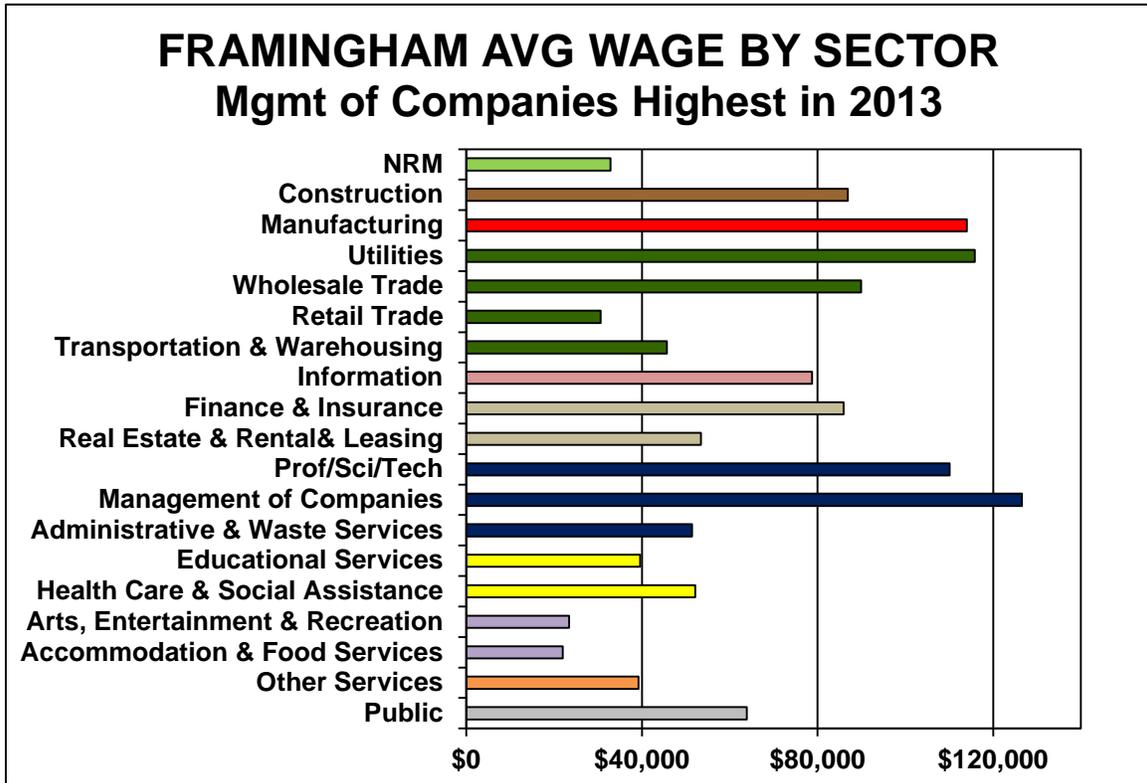


Source: MA EOLWD, MERC

- Among all Framingham supersectors (solid bars) in 2013, Manufacturing (MFG) generated the top average annual wage, \$114,000, followed by Professional and Business Services (PBS) (\$108,400), Construction (\$86,900) and Information (\$78,700). Leisure and Hospitality offered the lowest average annual wage, \$22,100.
- Among all Massachusetts supersectors (striped bars), Financial Activities produced the highest average annual wage, \$115,800, followed by Information (\$97,500), PBS (\$88,500), and Manufacturing (\$80,000). The lowest average annual wage occurred in Leisure and Hospitality, \$22,900.
- The Framingham average annual wage exceeded the MA average annual wage in six supersectors: Construction, Manufacturing, Trade, Transportation & Utilities (TTU), PBS, Other Services, and Public.

Supersector	Framingham Average Wage	Supersector	Framingham Average Wage
Manufacturing	\$114,000	Education & Health	\$51,300
PBS	\$108,400	TTU	\$49,900
Construction	\$86,900	Other Services	\$39,200
Information	\$78,700	Natural Resources	\$32,800
Financial Activities	\$73,400	Leisure & Hospitality	\$22,100
Public	\$63,900	<b>Total Framingham</b>	<b>\$74,700</b>

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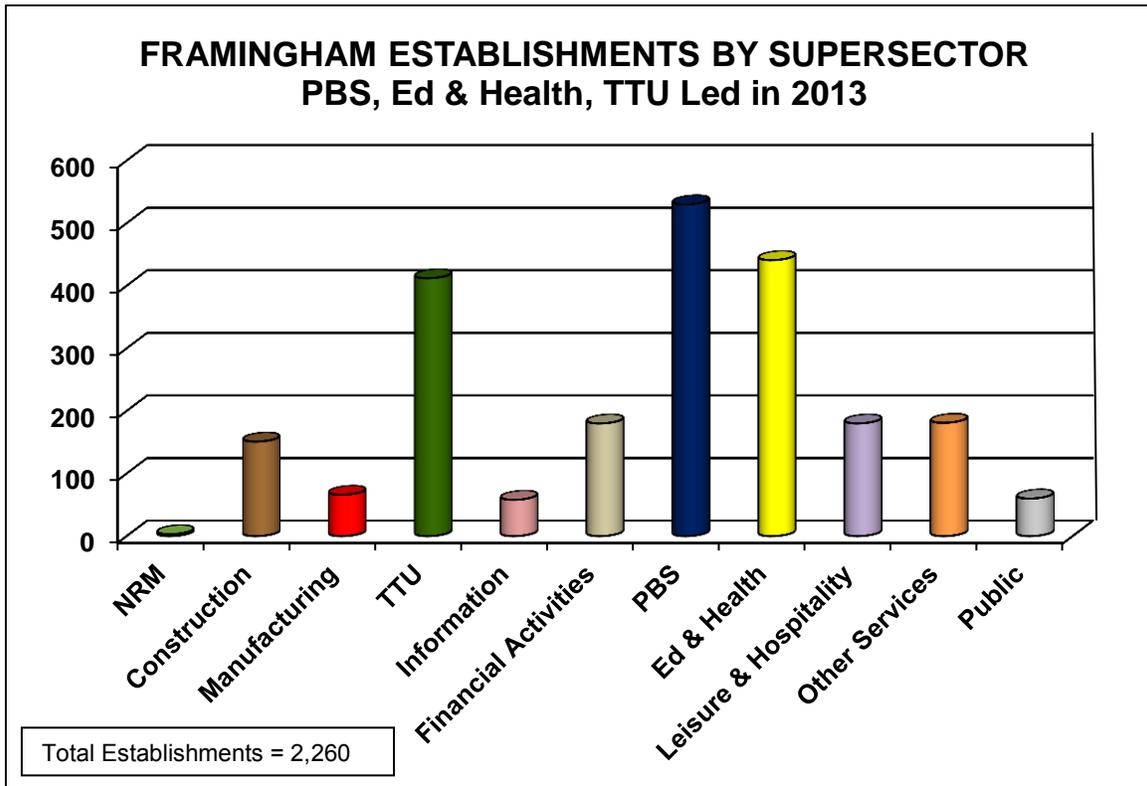
Source: MA EOLWD, MERC

- In 2013 the Framingham average annual wage recorded a historical high of \$74,700, a 3.3% increase from 2012.
- Among the NAICS sectors Management of Companies posted the highest average annual wage of \$126,500, followed by Utilities (\$115,800), Manufacturing (\$114,000), Professional/Scientific/Technical (Prof/Sci/Tech) (\$110,100), Wholesale Trade (\$89,900), Construction (\$86,900), and Finance & Insurance (\$85,900).
- Six sectors: Transportation & Warehousing, Information, Real Estate & Rental, Administrative & Waste Services, Health Care & Social Assistance and Public produced average wages between \$40,000 and \$80,000.
- Two sectors: Arts, Entertainment & Recreation and Accommodation & Food Services each produced average annual wages less than \$23,500, less than one-fifth of the average wage in Management of Companies.

NAICS Sector	Average Wage
Management of Companies	\$126,500
Utilities	\$115,800
Manufacturing	\$114,000
Prof/Sci/Tech	\$110,100

Note: Complete NAICS sector data is on page 28.

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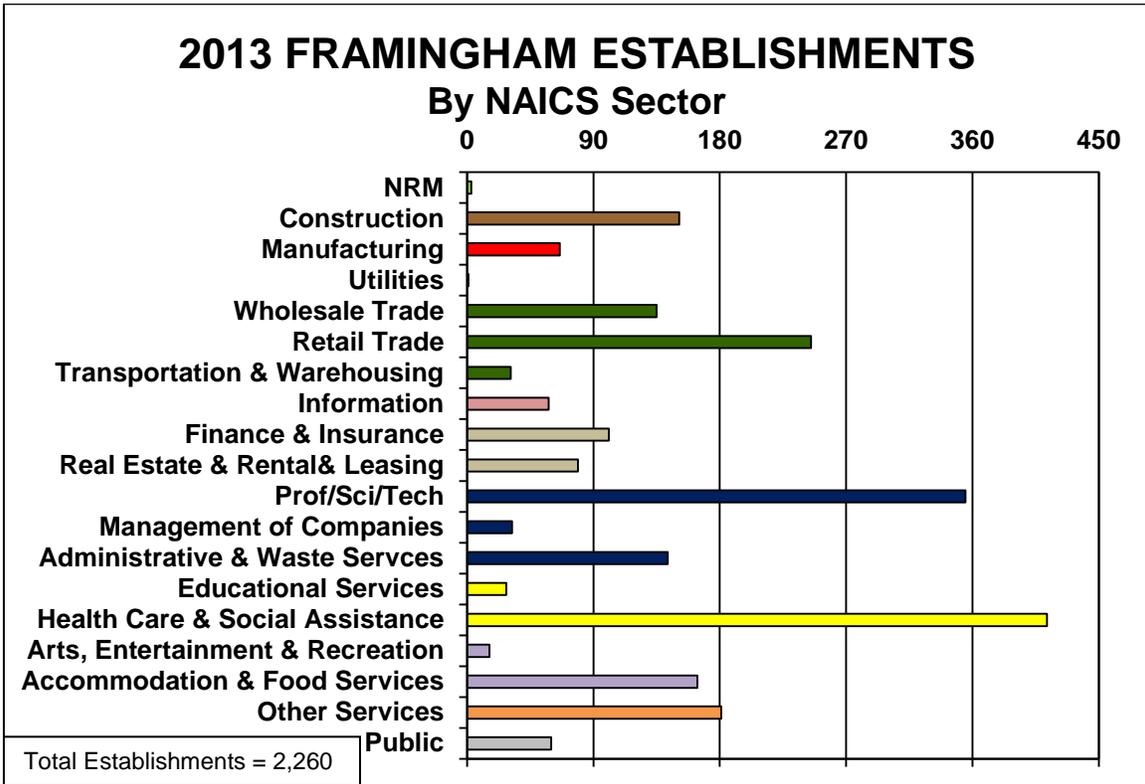


Source: MA EOLWD, MERC

- In 2013 the total number of establishments or separate places of work in Framingham was 2,260, up 1.6% from 2012.
- Professional and Business Services (PBS) led all supersectors with the largest number of establishments, 530, followed by private sector Education & Health Services (Ed & Health), 440, and Trade, Transportation and Utilities (TTU), 410.
- Over sixty percent of Framingham's establishments were in three supersectors; PBS, Education & Health Services, and TTU.
- Four supersectors: Natural Resources & Mining (NRM), Manufacturing, Information and Public each had fewer than 75 establishments sited in Framingham.

Supersector	Establishments	Supersector	Establishments
PBS	530	Construction	150
Education & Health	440	Manufacturing	70
TTU	410	Information	60
Financial Activities	180	Public	60
Leisure & Hospitality	180	NRM	3
Other Services	180	<b>Total Framingham</b>	<b>2,260</b>

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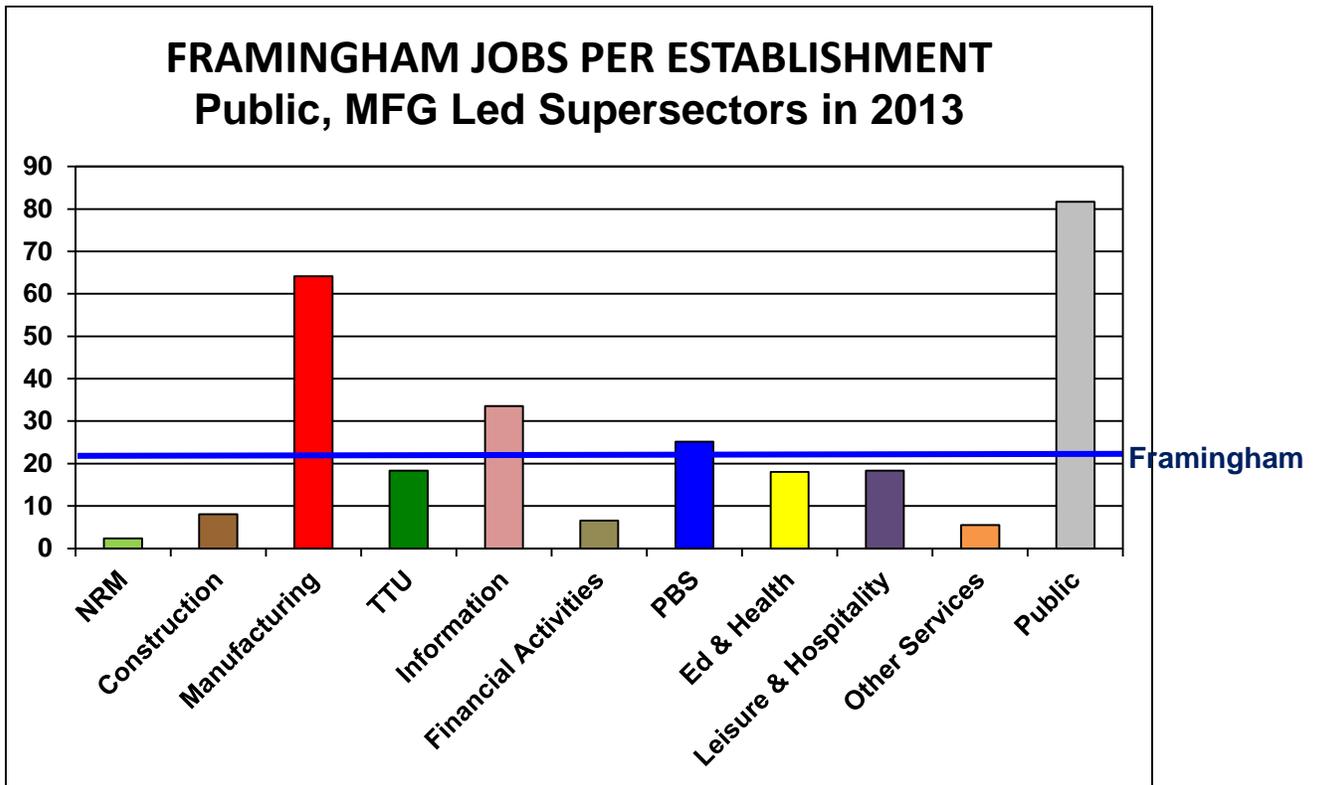
Source: MA EOLWD, MERC

- In 2013 Framingham establishments totaled 2,260, up 1.6% from 2012.
- Among all NAICS sectors Health Care & Social Assistance led with 410 establishments, followed by Professional, Scientific and Technical (Prof/Sci/Tech), 360, and Retail Trade, 250. These three sectors were home to 45% of Framingham's establishments.
- Six sectors had between 90 and 180 establishments: Construction, Wholesale Trade, Finance & Insurance, Administrative & Waste Services, Accommodation & Food Services and Other Services.

NAICS Sector	Establishments	% of Total
Health Care & Social Assistance	410	18%
Prof/Sci/Tech	360	16%
Retail Trade	250	11%
Other Services	180	8%
Accommodation & Food Services	160	7%
Construction	160	7%

Note: Complete NAICS sector data is on page 28.

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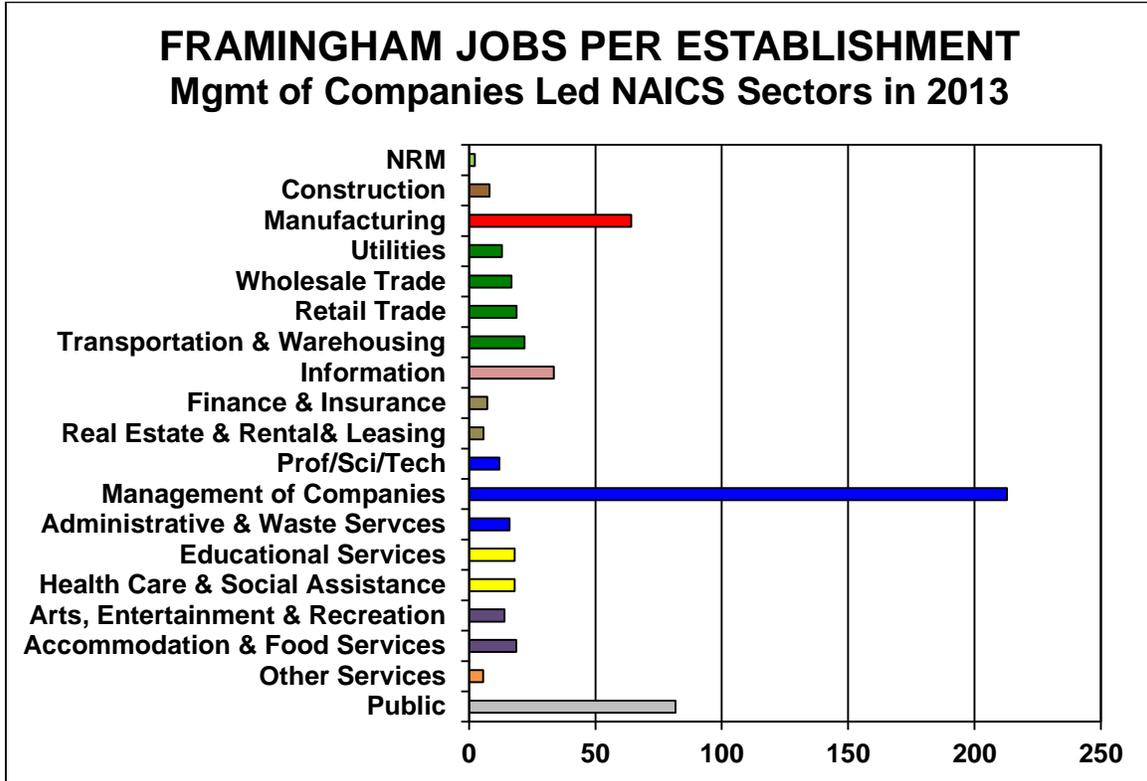


Source: MA EOLWD, MERC

- In 2013 Framingham establishments or separate places of work averaged 20.6 jobs per establishment, higher than the average for the Greater MetroWest Region (GMW) (17.5), Massachusetts (14.7), and the United States (14.6).
- Among all NAICS supersectors Public led with 82 jobs per establishment, followed by Manufacturing (MFG) with 64, Information with 34, and Professional and Business Services (PBS) with 25.
- All the remaining supersectors averaged 18 or fewer jobs per establishment.

Supersector	# Jobs per Establishment	Supersector	# Jobs per Establishment
Public	82	Leisure & Hospitality	18
Manufacturing	64	Construction	8
Information	34	Financial Activities	7
PBS	25	Other Services	6
Trade, Transportation & Utilities (TTU)	18	Natural Resources & Mining (NRM)	2
Ed & Health	18	<b>Framingham</b>	21

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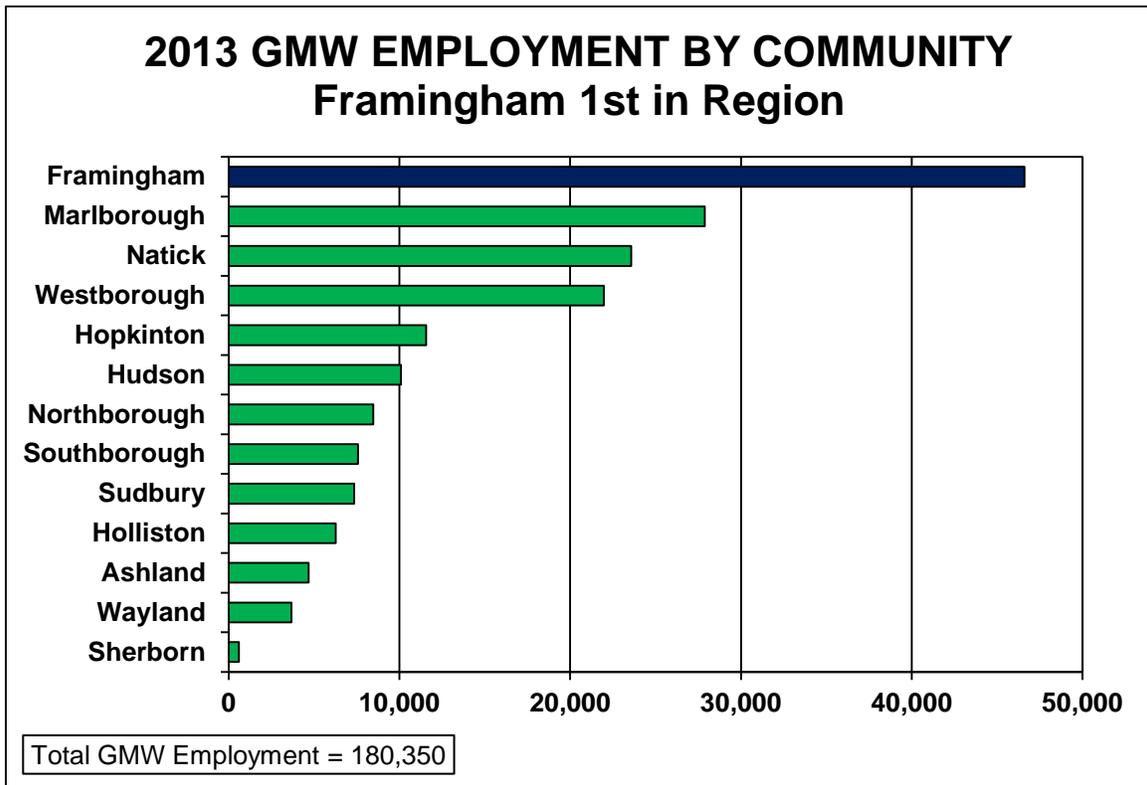
Source: MA EOLWD, MERC

- In 2013 Framingham establishments or separate places of work averaged 20.6 jobs per establishment.
- Among the 19 NAICS sectors Management of Companies led with 213 jobs per establishment in Framingham greatly exceeding all other sectors.
- Public had the second highest number of jobs per establishment (82), followed by Manufacturing (64), Information (34) and Transportation & Warehousing (22), and Retail Trade (19).
- Five sectors: Natural Resources & Mining (NRM), Construction, Finance & Insurance, Real Estate & Rental & Leasing, and Other Services each had fewer than 10 jobs per establishments.

NAICS Sector	# Jobs per Establishment
Management of Companies	213
Public	82
Manufacturing	64
Information	34
Transportation & Warehousing	22
Retail Trade	19

Note: Complete NAICS Sector data is on page 28.

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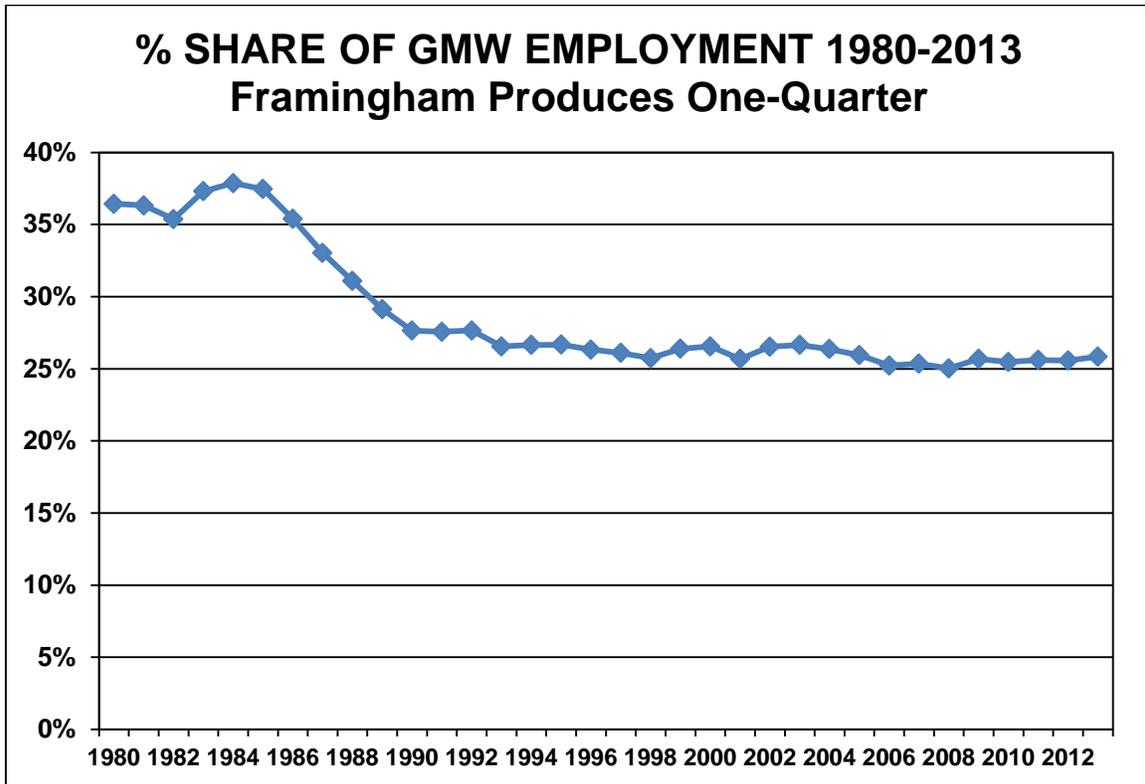


Source: MA EOWLD, MERC

- In 2013 Greater MetroWest Region (GMW) employment totaled 180,350 jobs, up 1.3% from 2012.
- Among the thirteen GMW communities in 2013, Framingham generated the highest number of jobs, 46,620 or 26% of regional employment.
- The top four communities, Framingham, Marlborough, Natick, and Westborough produced two-thirds of the region's employment in 2013.

Communities	Number of Jobs	Communities	Number of Jobs
<b>Framingham</b>	<b>46,620</b>	Southborough	7,570
Marlborough	27,890	Sudbury	7,350
Natick	23,580	Holliston	6,270
Westborough	21,970	Ashland	4,690
Hopkinton	11,570	Wayland	3,680
Hudson	10,090	Sherborn	600
Northborough	8,480	<b>GMW</b>	<b>180,350</b>

## FRAMINGHAM EMPLOYMENT REPORT

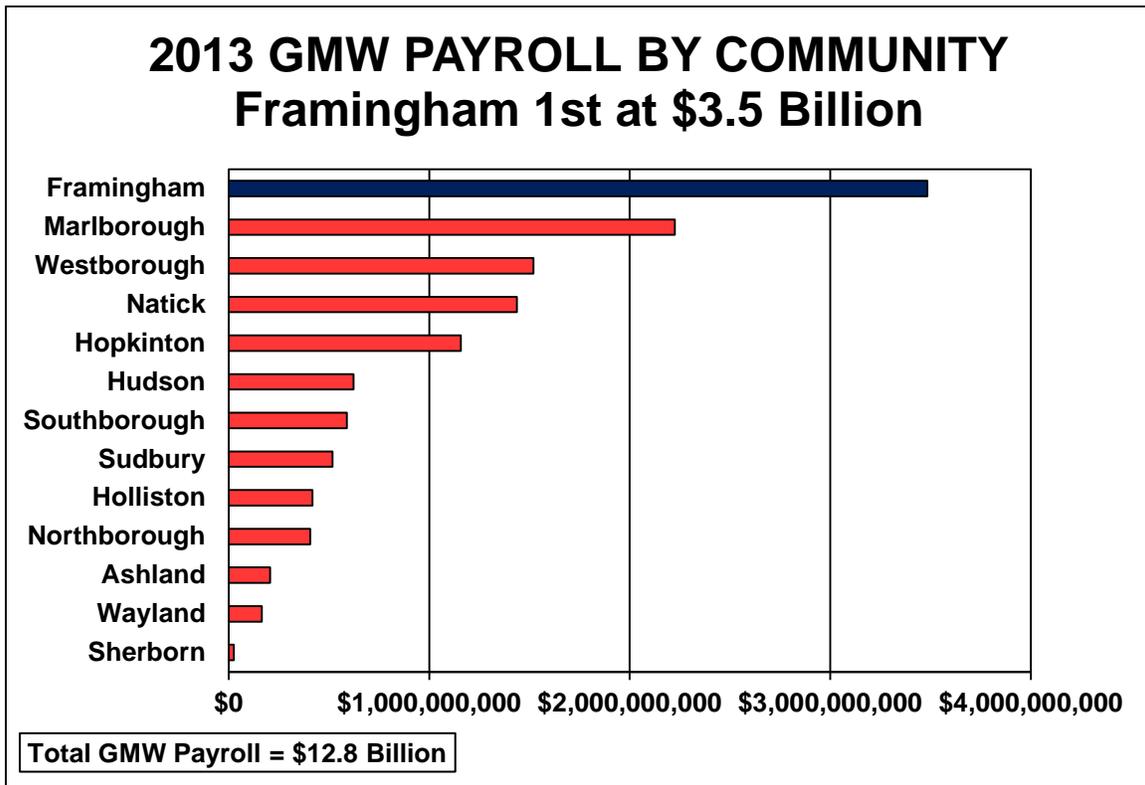


Source: MA EOLWD, MERC

- In 2013 Framingham produced 46,620 jobs, 26% or approximately one-quarter of the 180,350 jobs in establishments located within the Greater MetroWest Region (GMW).
- In 1980 employment in the Greater MetroWest Region (GMW) totaled 112,400 jobs. Framingham generated 40,950 jobs, 36% of total employment within the GMW region in 1980.
- In 1984 Framingham reached its highest percentage share of GMW employment at 38%. Subsequently, Framingham's share declined sharply to 27% in 1993 during a very severe recession.
- Since 1993 Framingham's share of GMW employment has varied between 25% and 27%.

Year	Framingham Employment	GMW employment	Framingham's % share of GMW employment
1980	40,950	112,390	36%
1990	39,050	141,250	28%
2000	45,880	172,790	27%
2010	44,630	175,240	25%
2013	46,620	180,350	26%

## FRAMINGHAM EMPLOYMENT REPORT

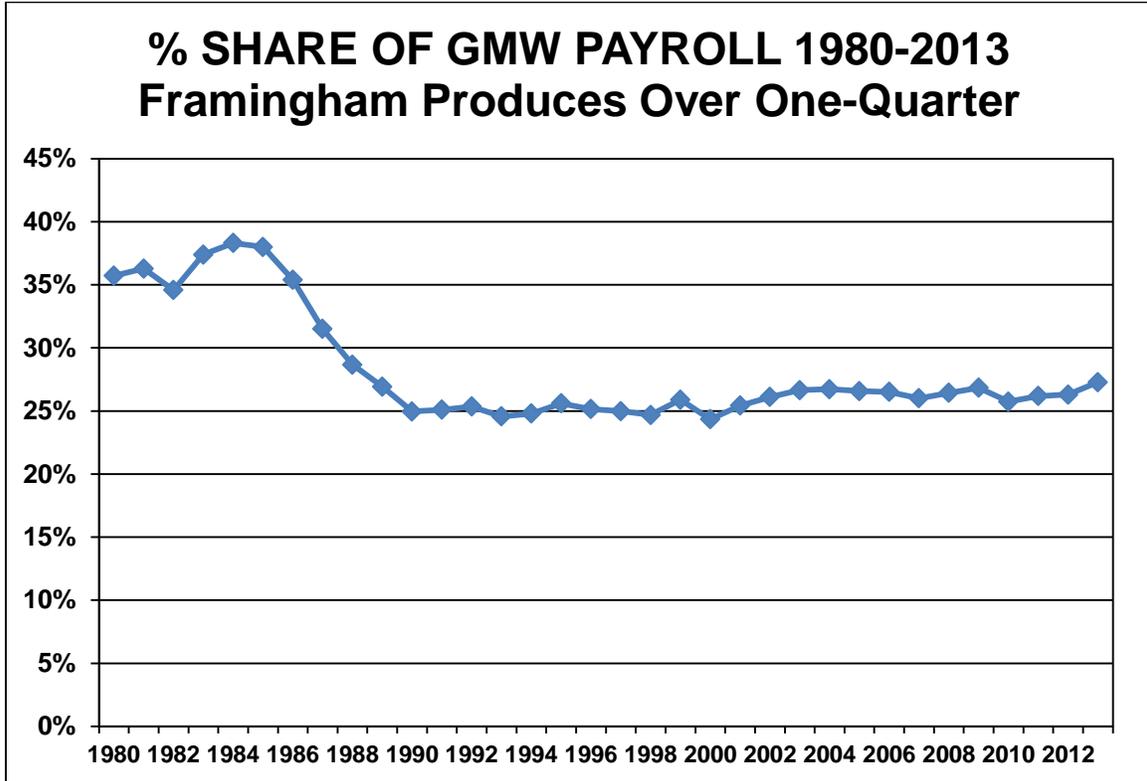


Source: MA EOLWD, MERC

- In 2013 payroll in the Greater MetroWest Region (GMW) totaled \$12.8 billion, a gain of 1.9% from 2012.
- Among the thirteen communities Framingham contributed the largest share of payroll, \$3.5 billion, or 27% of regional payroll.
- The five top communities: Framingham, Marlborough, Westborough, Natick and Hopkinton, generated over three-quarters of regional payroll.

Communities	Payroll	Communities	Payroll
<b>Framingham</b>	<b>\$3.5 billion</b>	Sudbury	\$517 million
Marlborough	\$2.2 billion	Holliston	\$418 million
Westborough	\$1.5 billion	Northborough	\$407 million
Natick	\$1.4 billion	Ashland	\$206 million
Hopkinton	\$1.2 billion	Wayland	\$165 million
Hudson	\$622 million	Sherborn	\$25 million
Southborough	\$589 million	<b>GMW</b>	<b>\$12.8 billion</b>

## FRAMINGHAM EMPLOYMENT REPORT

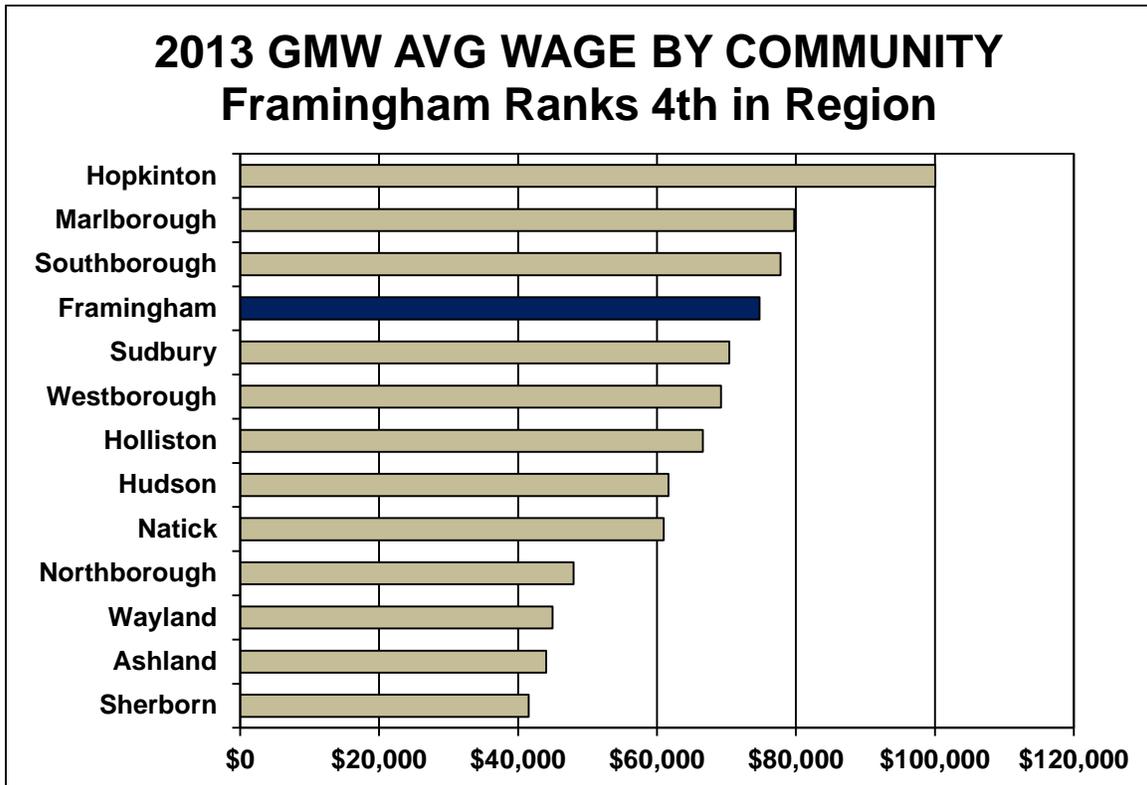


Source: MA EOLWD, MERC

- In 2013 payroll in Framingham totaled \$3.5 billion, 27% or more than one-quarter of the Greater MetroWest Region’s (GMW) payroll of \$12.8 billion.
- In 1980 Framingham produced a total payroll of \$579 million, more than one-third (36%) of the total GMW payroll of \$1.6 billion.
- In 1984 Framingham reached its highest percentage share of GMW payroll, 38%. Framingham’s share then declined sharply to 25% in 1990 during a major recession.
- Since 1990 Framingham’s share of GMW payroll has varied between 24% and 27%.

Year	Framingham Payroll	GMW Payroll	Framingham’s % share of GMW payroll
1980	\$579 million	\$1.6 billion	36%
1990	\$1 billion	\$4.2 billion	25%
2000	\$2.2 billion	\$8.9 billion	24%
2010	\$3.1 billion	\$11.9 billion	26%
2013	\$3.5 billion	\$12.8 billion	27%

## FRAMINGHAM EMPLOYMENT REPORT

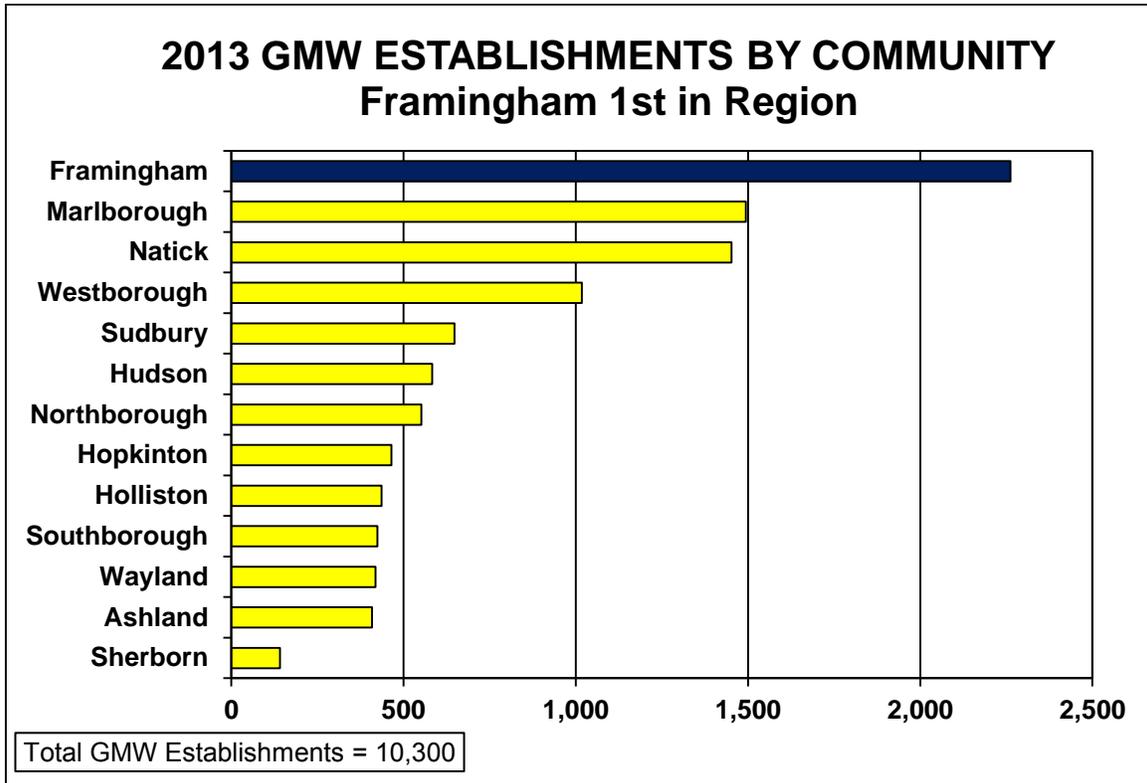


Source: MA EOWLD, MERC

- In 2013 the Greater MetroWest Region (GMW) produced a nominal average annual wage of \$70,800, up 0.6% from 2012.
- Among the thirteen GMW communities Framingham produced the fourth highest average annual wage, \$74,700, up 3.3% from 2012.
- The 2013 Framingham average annual wage exceeded the GMW average wage of \$70,800 by 6%, the Massachusetts average wage of \$61,800 by 21% and the U.S average wage of \$49,800 by 50%.

Communities	Average Wage	Communities	Average Wage
Hopkinton	\$100,100	Natick	\$61,000
Marlborough	\$79,800	Northborough	\$48,000
Southborough	\$77,800	Wayland	\$44,900
<b>Framingham</b>	<b>\$74,700</b>	Ashland	\$44,100
Sudbury	\$70,400	Sherborn	\$41,500
Westborough	\$69,200	<b>GMW</b>	\$70,800
Holliston	\$66,600	<b>MA</b>	\$61,800
Hudson	\$61,700	<b>US</b>	\$49,800

## FRAMINGHAM EMPLOYMENT REPORT

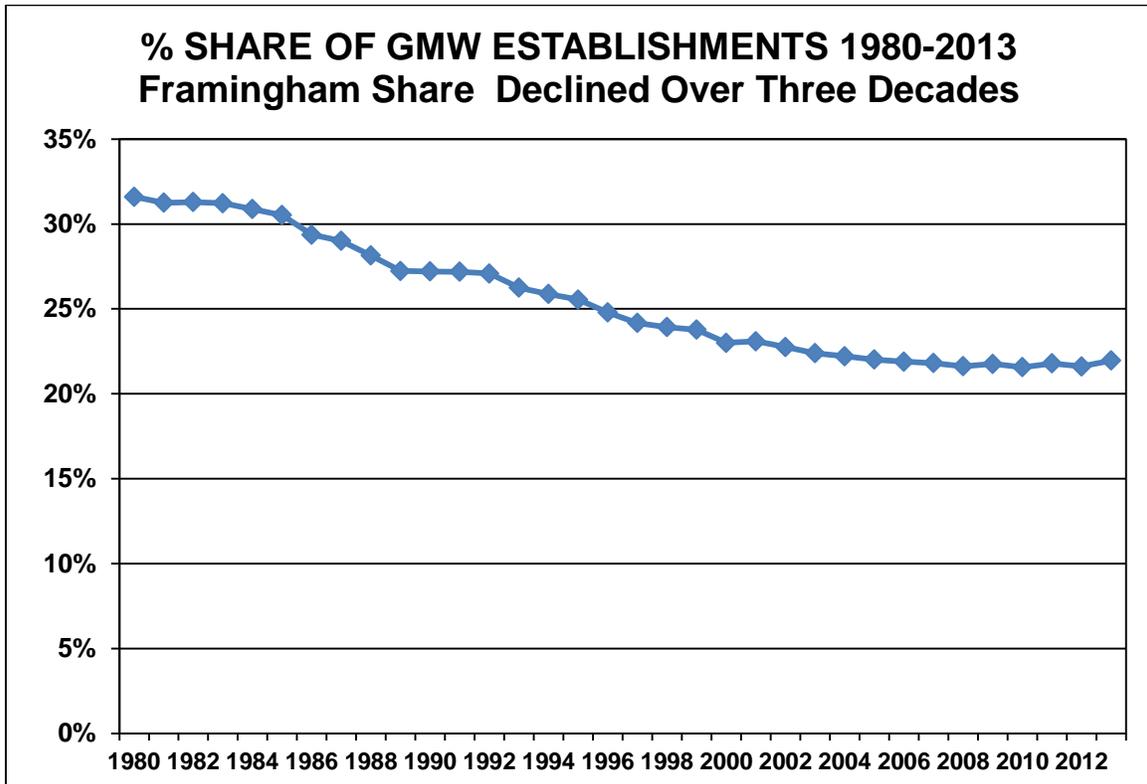


Source: MA EOWLD, MERC

- In 2013 the number of establishments or separate places of work in the Greater MetroWest Region (GMW) totaled 10,300, unchanged since 2012.
- Among the thirteen GMW communities Framingham recorded the highest number of establishments, 2,260 establishments, or 22% of the region's total establishments.
- Sixty percent of all GMW establishments were sited in four communities: Framingham, Marlborough, Natick, and Westborough.

Communities	Establishments	Communities	Establishments
<b>Framingham</b>	<b>2,260</b>	Hopkinton	460
Marlborough	1,490	Holliston	440
Natick	1,450	Southborough	420
Westborough	1,020	Wayland	420
Sudbury	650	Ashland	410
Hudson	580	Sherborn	140
Northborough	550	<b>GMW</b>	<b>10,300</b>

## FRAMINGHAM EMPLOYMENT REPORT



Source: MA EOLWD, MERC

- In 2013 the total number of Framingham establishments or separate places of work was 2,260, representing 22% of the Greater MetroWest Region's (GMW) 10,300 establishments. In 1980 Framingham was home to 1,520 of GMW's 4,820 establishments.
- Over the three decades the Framingham percentage share of GMW establishments or separate places of work declined steadily from a 32% share in 1980 to a 22% share in 2013.
- Since 1980 the number of GMW establishments increased by 114% while the number of Framingham establishments rose by 49%.

Year	Framingham Establishments	GMW Establishments	Framingham's % share of GMW Establishment
1980	1,520	4,820	32%
1990	2,210	8,130	27%
2000	2,190	9,520	23%
2010	2,220	10,300	22%
2013	2,260	10,300	22%

## FRAMINGHAM EMPLOYMENT REPORT

### NAICS Employment Data By Supersector Framingham 2013

NAICS Supersector	Number of Jobs*	Average Wage*	Total Payroll* (Millions)	Number of Establishments*
Natural Resources & Mining (NRM)	7	\$32,800	\$0.2	3
Construction	1,220	\$86,900	\$106	150
Manufacturing	4,230	\$114,000	\$483	65
Trade, Transportation & Utilities (TTU)	7,560	\$49,900	\$377	410
Information	1,950	\$78,700	\$153	60
Financial Activities	1,180	\$73,400	\$87	180
Professional & Business Services (PBS)	13,330	\$108,400	\$1,445	530
Education & Health	7,960	\$51,300	\$408	440
Leisure & Hospitality	3,300	\$22,100	\$73	180
Other Services	1,000	\$39,200	\$39	180
Public	4,900	\$63,900	\$313	60
<b>Total Framingham</b>	<b>46,620</b>	<b>\$74,700</b>	<b>\$3.5 Billion</b>	<b>2,260</b>
Greater MetroWest Region (GMW)	180,350	\$70,800	\$12.8 Billion	10,300
Massachusetts (MA)	3,296,930	\$61,800	\$203.8 Billion	223,670
United States	133,968,434	\$49,800	\$6,673 Billion	9,205,890

Source: MA EOLWD, MERC \*Rounded

## FRAMINGHAM EMPLOYMENT REPORT

### NAICS Employment Data by Sector Framingham 2013

NAICS Sector	Number of Jobs*	Average Wage*	Total Payroll* (Millions)	Number of Establishments*
Natural Resources & Mining (NRM)	7	\$32,800	\$0.2	3
Construction	1,220	\$86,900	\$106	150
Manufacturing	4,230	\$114,000	\$483	65
TTU**-Utilities	13	\$115,800	\$1.5	1
TTU**-Wholesale Trade	2,260	\$89,900	\$204	135
TTU**-Retail Trade	4,600	\$30,600	\$141	245
TTU**-Transportation & Warehousing	680	\$45,700	\$31	30
Information	1,950	\$78,700	\$153	60
Financial Activities**- Finance & Insurance	730	\$85,900	\$62	100
Financial Activities**- Real Estate & Rental & Leasing	450	\$53,400	\$24	80
PBS**-Professional/Scientific/Technical	4,240	\$110,100	\$466	355
PBS**-Management of Companies	6,810	\$126,500	\$862	30
PBS**-Administrative & Waste Services	2,280	\$51,400	\$117	145
Ed & Health**- Educational Services	510	\$39,600	\$20	30
Ed & Health**- Health Care & Social Assistance	7,450	\$52,100	\$388	415
Leisure & Hospitality**- Arts, Entertainment & Recreation	220	\$23,400	\$5	15
Leisure & Hospitality**- Accommodation & Food Service	3,070	\$22,000	\$67	165
Other Services	1,000	\$39,200	\$39	180
Public	4,900	\$63,900	\$313	60

Sources: MA EOLWD, MERC \* Rounded \*\* 5 NAICS supersectors are further subdivided into sectors: TTU (Transportation, Trade & Utilities), Financial Activities, PBS (Professional & Business Services), Ed & Health (Education & Health Services), Leisure & Hospitality.

# FRAMINGHAM EMPLOYMENT REPORT

## APPENDIX

### North American Industry Classification System (NAICS)

In 2001 the North American Industry Classification System (NAICS) permanently replaced the Standard Industrial Classification (SIC) system in use for seventy years. NAICS is an industrial classification system that groups establishments into industries based on the activities in which they are primarily engaged. It is a comprehensive system covering the entire field of economic activities, both producing and non-producing. NAICS has twenty separate industrial sectors that are described in this appendix. These twenty sectors are grouped into eleven supersectors. NAICS data used in this publication are presented by supersectors and by sectors.

### NAICS Supersectors\*

#### Goods-Producing Domain (GPD)

##### Natural Resources and Mining Supersector

- 11 Agriculture, Forest, Fishing and Hunting
- 21 Mining

##### Construction Supersector

- 23 Construction

##### Manufacturing Supersector

- 31-33 Manufacturing

#### Service Producing Domain (SPD)

##### Trade, Transportation and Utilities Supersector

- 22 Utilities
- 42 Wholesale Trade
- 44-45 Retail Trade
- 48-49 Transportation and Warehousing

##### Information Supersector

- 51 Information

##### Financial Activities Supersector

- 52 Finance and Insurance
- 53 Real Estate and Rental and Leasing

##### Professional and Business Services Supersector \*\*

- 54 Professional, Scientific and Technical Services
- 55 Management of Companies and Enterprises
- 56 Administrative and Support and Waste Management and Remediation Services

##### Education and Health Services Supersector

- 61 Educational Services
- 62 Health Care and Social Assistance

##### Leisure and Hospitality Supersector

- 71 Arts, Entertainment, and Recreation
- 72 Accommodation and Food Services

##### Other Services Supersector

- 81 Other Services (except Public Administration)

**Public Supersector\*** as used in this publication, includes the Public Administration NAICS sector defined below, plus all other jobs in federal, state and local government.

# **FRAMINGHAM EMPLOYMENT REPORT**

## **NAICS Sectors**

### **Natural Resources and Mining Supersector:**

**11-Agriculture, Forestry, Fishing and Hunting** comprises establishments primarily engaged in crop growing, animal raising, and timber and fish harvesting.

**21-Mining** comprises establishments that extract naturally occurring mineral solids, liquid minerals, and gases.

### **Construction Supersector:**

**23-Construction** comprises establishments primarily engaged in the construction of buildings or engineering projects.

### **Manufacturing Supersector:**

**31-33-Manufacturing** comprises establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products.

### **Trade, Transportation and Utilities Supersector:**

**22-Utilities** comprises establishments engaged in the provision of the following utility services: electric power, natural gas, steam supply, water supply and sewage removal, through a permanent infrastructure of lines, mains, and pipes.

**42-Wholesale Trade** comprises establishments engaged in wholesaling merchandise, generally without transformation, and rendering services incidental to the sale of merchandise, including the outputs of agriculture, mining, manufacturing, and certain information industries, such as publishing. The wholesaling process is an intermediate step in the distribution of merchandise.

**44-45-Retail Trade** comprises establishments engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. The retailing process is the final step in the distribution of merchandise; retailers are, therefore, organized to sell merchandise in small quantities to the general public. This sector comprises two main types of retailers: store and nonstore retailers.

**48-49-Transportation and Warehousing** comprises industries providing transportation of passengers and cargo, warehousing and storage for goods, scenic and sightseeing transportation, and support activities related to modes of transportation (air, rail, water, road, and pipeline).

### **Information Supersector:**

**51-Information** comprises establishments engaged in producing and distributing information and cultural products, providing the means to transmit these products, and processing data.

# **FRAMINGHAM EMPLOYMENT REPORT**

## **Financial Activities Supersector:**

**52-Finance and Insurance** comprises establishments primarily engaged in financial transactions (transactions involving the creation, liquidation, or change in ownership of financial assets) and/or in facilitating financial transactions.

**53-Real Estate and Rental and Leasing** comprises establishments primarily engaged in renting, leasing, or otherwise allowing the use of tangible or intangible assets.

## **Professional and Business Services Supersector\*\*:**

**54-Professional, Scientific, and Technical Services** comprises the performing of professional, scientific, and technical activities for others. These activities require a high degree of expertise and training. Some activities performed include: legal advice and representation, accounting, engineering services, computer services, research services, advertising services, and veterinary services.

**55-Management of Companies and Enterprises** comprises establishments that either hold the securities of companies for the purpose of owning a controlling interest or influencing management decisions, or establishments that administer, oversee, and manage establishments of the company and that normally undertake the organizational planning and decision making role of the company.

**56-Administrative and Support and Waste Management and Remediation Services** include establishments performing routine support activities for the day-to-day operations of other organizations. Activities performed include: office administration, hiring and placing of personnel, document preparation and similar clerical services, solicitation, collection, security and surveillance services, cleaning, and waste disposal services.

## **Education and Health Services Supersector:**

**61-Educational Services** comprises establishments that provide instruction and training to a wide variety of subjects. This instruction and training provided by specialized establishments, such as schools, colleges, universities, and training centers.

**62-Health Care and Social Assistance** comprises establishments that provide health care and social assistance for individuals.

## **Leisure and Hospitality Supersector:**

**71-Arts, Entertainment, and Recreation** comprises a wide range of establishments that operate facilities or provide services to meet varied cultural, entertainment, and recreational interests of their patrons.

**72-Accommodation and Food Services** comprises establishments providing customers with lodging and/or preparing meals, snacks, and beverages for immediate consumption.

## **Other Services Supersector:**

**81-Other Services** (except Public Administration) comprises establishments engaged in providing services not specifically provided for elsewhere in the classification system. Establishments in this sector are primarily engaged in activities, such as equipment repairing, administering religious activities, grantmaking, advocacy, and providing laundry services, personal care services, death care services, pet care services, photofinishing services, temporary parking services, and dating services.

## ***FRAMINGHAM EMPLOYMENT REPORT***

**Public Supersector\*** as used in this publication, includes the Public Administration NAICS sector defined below, plus all other jobs in federal, state and local government.

**Public Administration** The Public Administration sector consists of establishments of federal, state, and local government agencies that administer, oversee, and manage public programs and have executive, legislative, or judicial authority over other institutions within a given area.

**\*\*Professional and Business Services Supersector:** In this and other MERC publications MERC uses the acronyms **PBS** and **BPS** interchangeably to refer to this NAICS supersector.

# **FRAMINGHAM EMPLOYMENT REPORT**

## **SOURCES**

- United States Bureau of Labor Statistics, U. S. Department of Labor (BLS)
- Massachusetts Executive Office of Employment and Workforce Development (MA EOLWD), ES 202 Series
- MetroWest Economic Research Center (MERC), Framingham State University
- United States Census Bureau, U. S. Department of Commerce (US CENSUS), American Community Survey 2013 (1 year estimates)

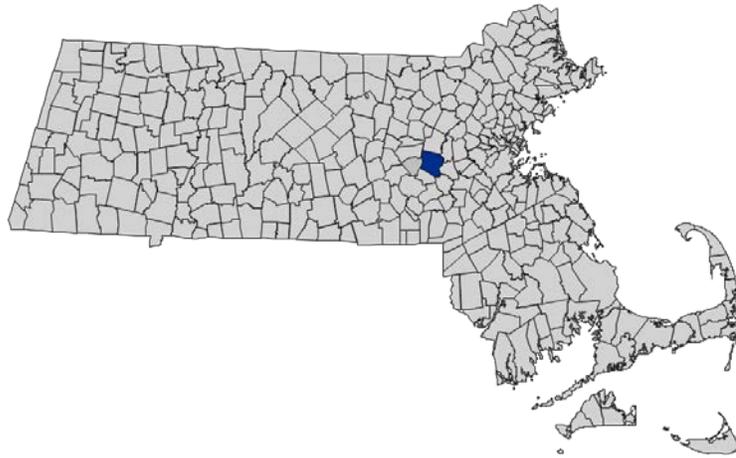
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