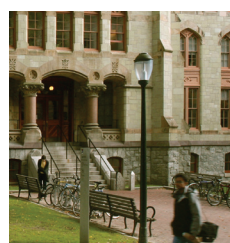


THE IMPACT OF HIGHER EDUCATION IN THE GREATER PHILADELPHIA REGION

- OCTOBER 2010 -



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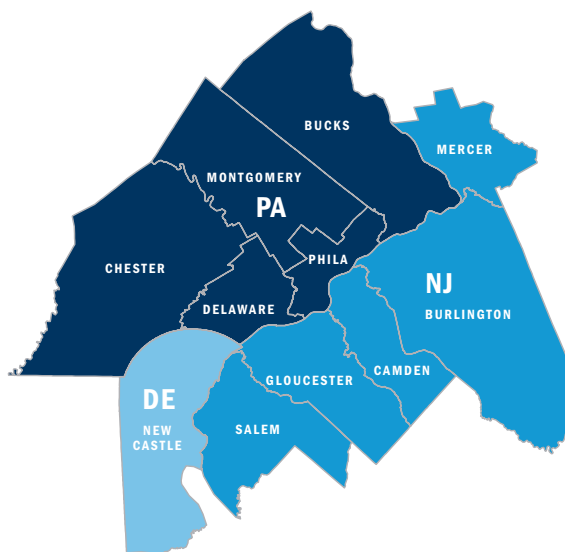
Saul Ewing
LLP

Greater Philadelphia's 101 colleges and universities are important engines for our regional economy.

The strength of the higher education sector is a competitive advantage of our region, employing our regional residents, educating our regional workforce and raising our region's reputation worldwide by exporting high level talent nationally and internationally. This report documents the economic impact of the colleges and universities in our region, focusing on impacts in four key areas:

- *Supporting Greater Philadelphia's economy*
- *Educating Greater Philadelphia's workforce*
- *Employing Greater Philadelphia's residents*
- *Improving Greater Philadelphia's communities*

There are 101 degree-granting institutions with 144 campuses in the Greater Philadelphia Region (GPR) that offer an Associate's degree or higher.¹



Data sources used in measuring the significance and impact of higher education in the region include: the Integrated Post-Secondary Educational Data System (IPEDS) maintained by the U.S. Department of Education, survey responses received from 38 of the largest regional institutions of higher learning, interviews with ten leaders from regional universities, census data from our region and comparable metro areas, school websites and budget documents, and other education research organizations such as Carnegie Commission on Higher Education and the College Board.

The 38 institutions that responded to the survey included the largest in the region and collectively these schools accounted for: 66.9% of total full-time equivalent (FTE) enrollment²; 74.7% of total annual operations spending; and 61.6% of all certificates and degrees awarded.

¹ The criteria for institutions of higher education included in this study were schools whose highest certificate or degree awarded was at least an Associate's degree; were accredited by the Middle States Commission on Higher Education; and, were located in the **11-county** GPR region. Using these criteria, 101 institutions were identified. This represents an increase over the 90 institutions included in the last study due to the inclusion of institutions (particularly nursing schools) that offer a certificate higher than an Associate's degree, existing schools that began awarding an Associate's degree, and the several schools whose main campuses are outside the region that began offering courses at locations in the region (e.g., Delaware State University and Wesley University.)

² Full time equivalent students (FTE) is a measure which translates all part-time students into their full-time equivalents and adds to that figure all full-time students. The region had 379,378 full- and part-time students in 2008.

Here are some of the major impacts of those 101 colleges, universities and technical schools:

SUPPORTING GREATER PHILADELPHIA'S ECONOMY

- **\$13.86 billion in total direct operations spending** during the 2007/08 academic year.³
- **\$2.41 billion in total student spending**, or \$8,137 per FTE enrolled student.
- **A \$14.96 billion total contribution to the Gross Regional Product (GRP)** in 2010 from the combined operations and student spending, or 4.1%.
- \$16.3 million in total expenditures per 10,000 residents ranked the region 3rd among the 25 largest metropolitan statistical areas (MSAs), behind only Boston and Baltimore.
- The responding schools plan to spend approximately \$2.93 billion in capital projects over the next five years, or an average of \$584.8 million which represents an increase from our prior study in 2007. This level of annual spending will generate a total increase in regional employment of 7,153 jobs along with \$447.7 million in total labor income.
- Colleges and universities in the region reported that they spent \$1.23 billion in research activities; this is funding that employs researchers and lab assistants and fuels the commercialization of ideas to accelerate new company formation and job growth in our region.

EDUCATING GREATER PHILADELPHIA'S WORKFORCE

- **379,378 students** in our region, **125,663 part-time** and **253,715 full-time, resulting in FTE enrollment of 295,603.** This ranked Greater Philadelphia 4th among the top 25 MSAs.
- A total of **80,533 certificates and degrees** were awarded; 78.6% of which were Bachelor's or higher; and 30.2% of which were advanced degrees or certificates.
- A rate of 124.3 certificates and degrees awarded per 10,000 residents ranked the GPR 3rd highest among the 25 largest MSAs based on their 2008 population.

EMPLOYING GREATER PHILADELPHIA'S RESIDENTS

- IPEDs data indicated total employment of the schools included in this study was **90,665 full-and part-time jobs** or 70,357 full-time equivalents, and GPR's higher education institutions paid a total of **\$6.36 billion in wages and salaries.**

IMPROVING GREATER PHILADELPHIA'S COMMUNITIES

- Community engagement programs sponsored by higher education institutions in the region are on the rise, with more schools creating centers for civic engagement and service learning. During 2007/08 these schools reported to IPEDS total public service spending⁴ of **\$151.3 million** and 29 institutions reported in the 2010 survey awarding more than **\$462 million in grants and scholarships to residents of the 11-county region alone.**

Across key measures, the positive impact of Greater Philadelphia's higher education institutions has grown. The table below compares the significant direct effects of higher education presented in this analysis with those presented in our 2007 study.

KEY IMPACTS OF HIGHER EDUCATION ON THE REGION		
INDICATOR	2007 STUDY	2010 STUDY
NUMBER OF FTE STUDENTS	275,811	295,603
NUMBER OF CERTIFICATES AND DEGREES AWARDED	71,041	80,533
TOTAL OPERATIONS SPENDING	\$12.29 BILLION	\$13.86 BILLION
TOTAL STUDENT SPENDING	\$2.28 BILLION	\$2.41 BILLION
TOTAL EMPLOYMENT AT THE SCHOOLS (FTES)	66,006	70,357
AVERAGE ANNUAL CAPITAL SPENDING – NEXT 5 YRS	\$528.5 MILLION (2007\$)	\$584.8 MILLION (2010\$)

[NOTE: Figures presented above in the two columns are presented for the 2005/06 and 2007/08 academic year unless otherwise noted.]

³ The base year in this study for data obtained from external sources such as IPEDs was the **2007/08 academic year**; the economic impact figures are presented in current 2010 dollars so as to be consistent with the survey results. Direct effects such as enrollment, spending, and employment were adjusted when necessary to include only educational programs that were provided within the study area. Unless noted otherwise, numbers presented in this report are for the 2007/08 academic year.

⁴ Public service spending is a category captured by IPEDS, and includes spending by schools for activities that provide non-instructional services beneficial to individuals and groups external to the institution. Examples are conferences, institutes, general advisory service, reference bureaus, and similar services provided to sectors of the community. Not included in public service spending are: municipal services, volunteer hours, cash and in-kind services to support charity care, unreimbursed Medicare and Medicaid, subsidized health services, local procurement programs or a number of other economic development initiatives fostered by institutions. Public service spending is, therefore, only a partial measure of community participation and impact.

Higher Education... Educating Greater Philadelphia's (and the Nation's) Workforce

Our regional schools educate our region's workforce. According to the responses from the 38 schools, 58.3% of their students are from the region and studies show that most of these students stay in the region after graduation.⁵ Students represent the talent pipeline that our companies need to build their businesses. And, they serve as a lure for companies considering various locations where the availability of talent can be a tipping point.

In the 2007/08 academic year there were **379,378 students** attending a college or university in our region, **125,663 part-time and 253,715 full-time**, an increase over the 2005/06 academic year. Translated as 295,603 full-time equivalent students, Greater Philadelphia ranked fourth among the top 25 MSAs in the total number of enrolled students and fifth among the 10 largest MSAs based on its FTE enrollment per 10,000 residents.

With **80,533 certificates and degrees** granted, Greater Philadelphia **ranked third** in the number of degrees granted per 10,000 residents at **124.3**.

FULL-TIME EQUIVALENT ENROLLMENT RATES - 2007/08 ACADEMIC YEAR	
MSA	FTE'S/ PER 10,000 RESIDENTS
BOSTON	616.4
SAN FRANCISCO	513.0
LOS ANGELES	510.5
PITTSBURGH	501.2
GREATER PHILADELPHIA	497.3
DENVER	495.8
SAN DIEGO	492.9
BALTIMORE	475.4
MINNEAPOLIS	465.7
WASHINGTON	459.8

FTE = full-time equivalent enrollment

Calculated as full-time students + part-time students*1/3

ASSOCIATE AND HIGHER CERTIFICATES AND DEGREES AWARDED PER 10,000 RESIDENTS - 2007/08 ACADEMIC YEAR	
MSA	TOTAL AWARDS PER 10,000
BOSTON	159.9
PITTSBURGH	128.5
GREATER PHILADELPHIA	124.3
SAN DIEGO	122.3
BALTIMORE	112.1
WASHINGTON	111.6
DENVER	110.4
MINNEAPOLIS	105.4
NEW YORK	104.7
CHICAGO	100.9

Our region also **granted more first professional degrees** (MDs, MBAs, JDs, etc.) per 10,000 residents **than any other metro area in the country**, ahead of Boston and Chicago. And, we can boast the **second highest award rate** for bachelor's degrees, behind only Boston.

The certificates and degrees awarded by the region's schools are concentrated in a few areas of study. The top five in 2007/08 based on the first or primary area of study were:

- Business, Management, Marketing and related: 14,838 awards, 18.7% of the total;
- Health Professions: 12,458 awards, 15.7% of the total;
- Education: 8,799 awards, 11.1% of the total;
- Liberal Arts and Sciences, Humanities: 5,199 awards, 6.6% of the total; and
- Social Sciences: 3,721 awards, and 4.7% of the total.

These five areas of study accounted for 56.7% of first certificates and degrees awarded that year. The top 10 areas of study – which includes Visual and Performing Arts, Psychology, Engineering, Biology and Law – accounted for 73.9% of all certificates and degrees awarded.

⁵ According to a 2004 study by the Knowledge Industry Partnership, 86% of graduates originally from the area stay in the area.

Higher Education... Employing Greater Philadelphia's Residents

Colleges and universities are labor-intensive organizations, employing high-level researchers and academics, as well as service workers, healthcare workers, administrative support and construction workers. The wide range and large number of jobs generated by our higher education sector have significant economic impacts. According to IPEDs, regional colleges and universities directly employed a total of 90,655 persons during 2007/08 academic year and paid a total \$6.36 billion in wages and salaries.

The table to the right presents the distribution of higher education employment by major occupational category in that year. Not surprisingly, education, training and library support occupations rank first accounting for 43.8% of total employment, followed by office and administrative workers with a 19.7% share. As a whole, the higher education sector requires workers with above-average levels of education and training, resulting in above-average wages for the sector. A detailed analysis showed that, in 2008, 59.3%

TOP 5 HIGHER EDUCATION EMPLOYMENT SHARES BY MAJOR OCCUPATION - 2008	
MAJOR OCCUPATIONAL CATEGORY	% OF TOTAL EMPLOYMENT
EDUCATION, TRAINING, AND LIBRARY	43.8%
OFFICE AND ADMINISTRATIVE SUPPORT	19.7%
MANAGEMENT	6.1%
BUSINESS AND FINANCIAL OPERATIONS	4.5%
BUILDING AND GROUNDS CLEANING AND MAINTENANCE	3.6%

of the occupations needed by the higher education sector required workers with a Bachelor's degree or higher, and 41.4% of the occupations required advanced degrees.

Higher Education... Supporting Greater Philadelphia's Regional Economy

The 101 higher education institutions in our region educate our workforce and employ our residents. They sustain our economy in a variety of other ways as well. With \$13.86 billion in total higher education expenditures during 2007/08, economic multiplier effects from that spending flow throughout our economy. Universities employ workers who purchase goods and services sustaining other

regional businesses. Students rent apartments, eat in restaurants and buy clothes and school supplies, furthering the impact that the schools have in their communities. In a comparison of the top 25 metro areas, Greater Philadelphia ranked third in spending per 10,000 residents, behind only Boston and Baltimore.

ECONOMIC IMPACTS OF ANNUAL SPENDING GENERATED BY COLLEGES AND UNIVERSITIES IN THE GREATER PHILADELPHIA REGION - 2010			
	OPERATIONS SPENDING	STUDENT SPENDING	TOTAL ANNUAL IMPACTS
EMPLOYMENT (ACTUAL NUMBER OF JOBS)			
DIRECT	107,627	27,889	135,516
INDIRECT	20,891	4,591	25,482
INDUCED	32,830	5,391	38,221
TOTAL	161,348	37,871	199,219
EMPLOYMENT MULTIPLIER	1.50	1.36	1.47
% OF REGION IN 2010	4.4%	1.0%	5.4%
GROSS REGIONAL PRODUCT (MILLIONS OF \$)			
DIRECT	\$6,799.6	\$1,858.8	\$8,658.4
TOTAL	\$12,142.5	\$2,815.2	\$14,957.7
% OF REGION IN 2010	3.3%	0.8%	4.1%
LABOR INCOME (MILLIONS OF \$)			
DIRECT	\$5,790.0	\$877.6	\$6,667.5
TOTAL	\$8,787.5	\$1,435.4	\$10,222.9
% OF REGION IN 2010	3.0%	0.5%	3.5%

The table on page 5 presents the total economic impacts of direct spending⁶ in three ways:

- Operations (impacts related to running a college or university)
- Student spending (impacts related to what students spend to live in the region while going to school, excluding tuition, fees and room and board paid to the schools)
- Total impacts which adds the two direct spending effects

This illustrates that direct spending by colleges and universities generates increases in total regional employment of 199,219 jobs, \$14.96 billion in total gross regional product (2010\$), and \$10.22 billion in labor income (2010\$). These increases are equivalent to 5.4% of total employment, 4.1% of GRP and 3.5% of labor income in 2010.

Student spending, even more than university and college spending, is more likely to occur locally, given what students spend their money on. Food, entertainment, rent and personal services are typically purchased from local businesses here and the money spent at those businesses stays here.

As noted, total student spending is up from just under \$2.3 billion in the 2005/06 academic year. The table to the right presents the composition of total student spending during

2007/08. The amounts and spending proportions by students in three different housing situations – in university-owned housing; in off-campus housing not owned by the school, but not at the parent’s home; and living at home – were determined using survey responses to the 2007 and 2010 studies, from data in published studies; and data sources such as IPEDs and the College Board.

COMPOSITION OF STUDENT SPENDING - 2007/08		
GOOD OR SERVICE PURCHASED	AMOUNT (MILLIONS OF \$)	%
BOOKS AND SUPPLIES	399.2	16.6
RENT AND UTILITIES	698.9	29.1
FOOD	318.3	13.2
CLOTHING	164.1	6.8
ENTERTAINMENT	266.0	11.1
TRANSPORTATION	257.1	10.7
OTHER	301.7	12.5
TOTAL	2,405.4	100.0
ANNUAL SPENDING PER FTE	8,137	

Higher Education... Improving Greater Philadelphia’s Neighborhoods and Quality of Life

Universities and colleges contribute to all areas of regional improvement from safety and healthcare to childhood education and environmental sustainability, and many programs and service areas in between. The commitment to community participation is part of the core mission of most institutions and there is an increasing interest in service learning and community engagement on the part of the student body as well. Data from regional schools demonstrates how central community participation is:

- **Regional institutions of higher education provided \$1.34 billion in total student grants in the 2007/08 academic year.** In the current survey, 29 schools reported offering \$462 million in grants and scholarships to regional residents alone.
- **Public service spending by regional institutions totaled \$151.3 million in 2008.** Public service spending includes all operating expenses associated with activities that provide non-instructional services beneficial to those outside of the academic institution. Examples are conferences, general advisory services and community services.
- **36 of our region’s largest universities responded to the survey regarding their community participation programs.***

A majority of these institutions provide some arts and culture opportunities (80.6%); education & health services (55.6%); business services (55.6%) and recreational opportunities (55.6%) for free to community members. In addition, institutions provide these programs and services to students, staff and faculty for free and to the community for a fee and/or subsidized.

SERVICES PROVIDED BY COLLEGES AND UNIVERSITIES FOR UNAFFILIATED COMMUNITY MEMBERS - 2010			
SERVICE	FOR A FEE	SUBSIDIZED	FREE
ARTS & CULTURE	69.4%	27.8%	80.6%
EDUCATION & HEALTH SERVICES	55.6%	36.1%	55.6%
BUSINESS SERVICES	41.7%	41.7%	55.6%
RECREATIONAL OPPORTUNITIES	55.6%	52.8%	55.6%
GOVERNMENT SERVICES	5.6%	5.6%	22.2%
VOLUNTEER OPPORTUNITIES	2.8%	2.8%	41.7%

* Note: 36 of the 38 responding institutions provided community participation information.

⁶ Direct impacts include those goods and services schools and students purchase directly for themselves. Indirect impacts include the additional goods and services that businesses serving schools and students have to purchase from their suppliers. And induced spending is the spending by employees at local businesses who then in turn buy goods and services from their suppliers.

Community engagement and participation activities at colleges and universities tend to fall into the six categories displayed on page 6, each of which has a profound social and economic impact on communities and local governments:

- ▶ **Arts and Culture:** As noted previously, 80.6% colleges and universities surveyed provide free arts and culture offerings to those outside the university community. From plays and concerts to art exhibits, colleges and universities add to the breadth and depth of the cultural offerings in the region. Moore College of Art and Design focuses its community participation on the arts in particular, as might be expected. In addition to presenting exhibitions and programs featuring nationally and internationally recognized artists, designers and arts professionals that are free and open to the public, Moore has permanently endowed two galleries at the Kimmel Center for the Performing Arts, exhibiting works by faculty, students and alumnae. Programs for youth include Young Artist Workshops on Saturdays and in the summer are made accessible to under-served boys and girls through funded scholarships. In-classroom K-12 art instruction and teacher training offered through a collaboration between the galleries and Moore's Art Education Department, along with school tours, hands-on activities related to exhibitions, and annual exhibitions of K-12 student work in Moore's galleries. Other activities for the community include free after-school art classes for youth at The Philadelphia Center for Arts & Technology, Family Fun Days, and student and alumnae volunteer projects to support area charities.
- ▶ **Education and Health Services:** Health and education assistance is often top of the list of university and college assistance to local neighborhoods, especially those universities with schools of education or medical and nursing schools. Temple's College of Education provided 23,186 hours of assistance to local communities in 2008 and the school valued its volunteer assistance to educational institutions in the city at \$1,301,751.
- ▶ **Business Services:** These programs include, but are not limited to: Procurement programs to ensure that colleges and universities purchase from neighborhood vendors; Scholarship programs that provide tuition grants focused especially on regional residents; and Business Improvement Initiatives to ensure that neighborhoods are clean and safe, with healthy retail options. For example, Rowan University has partnered with its host community of Glassboro to create a mixed-use, business and university-housing corridor – a “campus village” – linking the

University to the historic downtown. In addition, faculty and staff have been encouraged to purchase homes in Glassboro with the University offering employees \$1,500 a year for 10 years if they buy homes in the borough. More than 100 employees have taken advantage of the program.

- ▶ **Recreational Opportunities:** Colleges and universities supplement local recreational opportunities in a variety of ways. Many offer memberships to their recreation centers at reduced fees to community members. Camps and after-school programs are often offered, again, at reduced rates to neighborhood children and staffed by college coaches and players. And, schools are increasingly supplementing their neighborhoods' outdoor and recreational amenities as many grow their campuses. A local library and adjacent park in Camden were dilapidated and unusable by the neighborhood. After becoming owner of the site in 1985, Rutgers University-Camden restored the historic Johnson Park to its original Victorian-era beauty, and is working to similarly restore the library. Both serve as centers for community and campus activity and recreation.
- ▶ **Government Services:** Many institutions provide services that alleviate local municipalities from providing assistance to often large swaths of their locales. A sample of just 11 schools estimates their community contribution towards municipal-related services to be \$518 million annually. For example, the University of Pennsylvania employs the largest private police force in the Commonwealth of Pennsylvania, and the third largest private department in the country. These dedicated resources add to the safety of the West Philadelphia community.
- ▶ **Volunteerism:** Of the 295,603 FTE students in the region, a large portion volunteer as part of a service learning project, a sorority or fraternity initiative, through some other student group or simply on their own. Many schools have addressed students' interest in volunteering by providing a formal coordinating office for linking students with organizations that need volunteers. For example, the University of Delaware conducted a study that showed their students volunteering 142,943 hours in 2008/09 to help local community groups and individuals and the Office of Service Learning now coordinates student volunteer activity.

This report was produced by Select Greater Philadelphia in collaboration with the Greater Philadelphia Chamber of Commerce's Regional Colleges and Universities Presidents' Council and updates a similar 2007 study. To download the report, or for additional information, go to www.selectgreaterphiladelphia.com

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Community College of Philadelphia	Rowan University
Delaware County Community College	Rutgers, The State University of New Jersey
Delaware Valley College	Saint Joseph's University
DeVry University	Salus University
Drexel University	Strayer University
Eastern University	Swarthmore College
Gloucester County College	Temple University
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