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Health Care & Education

In 2020, Philadelphia's health care institutions were the epicenter of the response to the COVID-19 epidemic. Jefferson Health and Penn Medicine converted parking lots to walk-in and drive-in testing sites and then deployed multiple vaccination sites across the city and region. Temple University converted the Liacouras Center into an overflow hospital for coronavirus cases, before transforming it into a site for vaccinations. Hospital beds and personnel were consumed by the treatment of serious cases.

In 2019, health care and education provided 242,800 jobs citywide in the public and private sectors, approximately one-third of all payroll employment in Philadelphia. In Center City, these sectors accounted for 18% of employment with 55,000 jobs. During the prior decade, private health care employment growth in Philadelphia reflected the expansion of ambulatory care services – offices of doctors and other health care practitioners, outpatient care centers, laboratories, and home health care services. From 2009 to 2019, private ambulatory care employment increased 42%, while hospital employment increased 1% and nursing and residential care facilities declined 8%.

In 2020, while front-line workers staffed hospitals 24-7, professional, technical and administrative staff in hospitals and academic institutions worked remotely, like other office employees. Classes shifted online and telemedicine replaced office visits. Closed buildings reduced demand for administrative and support personnel. As a result, employment in health care and education declined in 2020. Health care and social assistance employment was down by 6,000 between March and December, with losses primarily in social assistance jobs. Educational institutions shed 9,400 jobs during this period. As students return to the classroom this fall, doctors' offices reopen and day care and other social services resume, most of these jobs should be restored. However, the broader decentralizing trends that bring services closer to where people live are likely to continue.

Center City's 12 institutions of higher education collectively enrolled 30,934 undergraduate and graduate students in the fall of 2019, including 16,000 at Community College of Philadelphia and 8,000 at Thomas Jefferson University. The Center City campuses of Drexel University and Temple University enrolled an additional 2,100 and 700, respectively. Including nearby

institutions – Temple’s main campus in North Philadelphia, and the University of Pennsylvania, Drexel University, and the University of the Sciences in University City – the total higher education enrollment in or near Center City exceeded 110,000 in 2019.

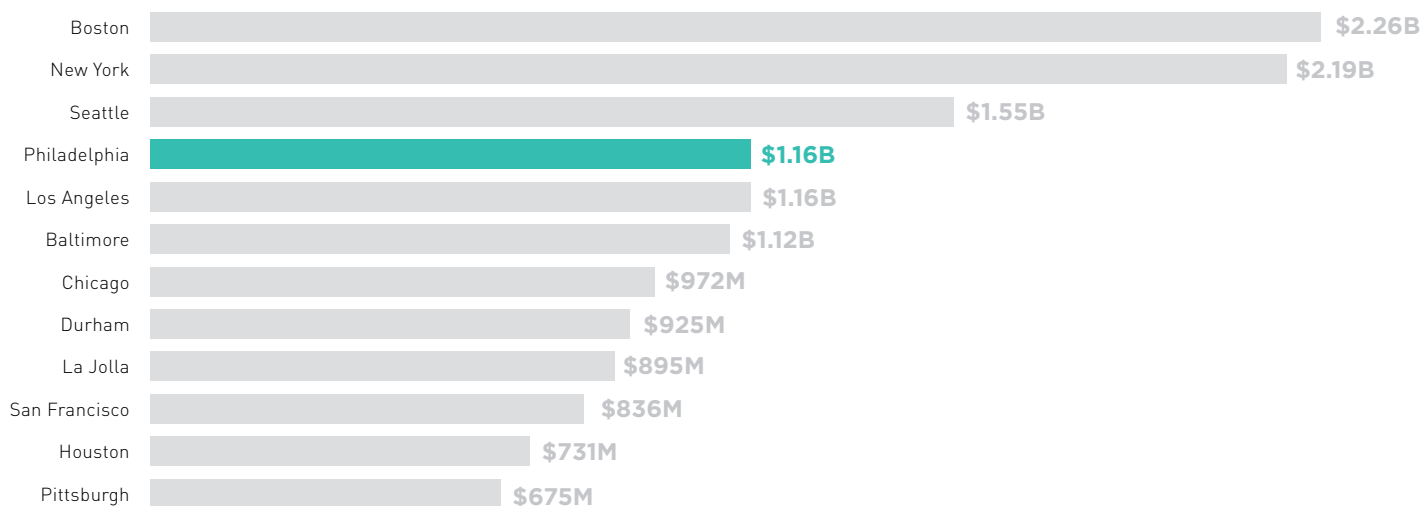
While the pandemic forced many institutions to transition to virtual learning, colleges and universities located in or near Center City estimate that 80% of students who previously lived in Philadelphia, on campus or off, returned to the city in fall 2020. Temple University reported more than 12,000 students living on and around campus in the 2020-2021 academic year, with 1,000 residing in ZIP codes of 19123 and 19130. The presence of students helped sustain both the apartment market and downtown retail, making up 13% of the adult population in Greater Center City.

Graduates of these institutions form a critical mass of well-educated workers, creating a powerful lure for Philadelphia’s growth industries. Health sciences are the major for 28% of local college graduates; science, technology engineering and math (STEM) accounts for another 20%; business degrees are earned by 19%. A growing number of college graduates have been staying in Philadelphia, contributing to the 44% increase since 2000 in Greater Center City of residents in the 20-34 age group. They now number more than 70,000.

In 2020, Philadelphia’s research institutions attracted \$1.1 billion in National Institutes of Health funding, the fourth-highest total among major U.S. cities. Combined research spending at Drexel, Temple, Jefferson, and Penn totaled \$2 billion in 2018. In 2020, the University of Pennsylvania, in partnership with Children’s Hospital of Philadelphia and The Wistar Institute, began research on the health impacts of COVID-19 on children.

These academic, research and medical institutions have helped Philadelphia emerge as a national center for life sciences, fostering new startups and attracting new businesses. While most growth is concentrated in University City, several older buildings in Center City that can support heavy floor loads and have good ventilation are attracting lab space. Venture capital has played a large part in the explosive growth of these small labs. According to Bridge Bank, in 2010 there were 113 deals in Philadelphia. That number surged to 260 in 2019 and reached a high of 221 in 2020, despite the pandemic. Health care and education have therefore remained not only a mainstay of today’s economy, they are laying the groundwork for Philadelphia’s next economy.

National Institutes of Health Funding, 2020



Source: U.S. Department of Health and Human Services, National Institutes of Health

Private Employment in Education and Health Care, Philadelphia City and Pennsylvania Suburbs, 2009-2019

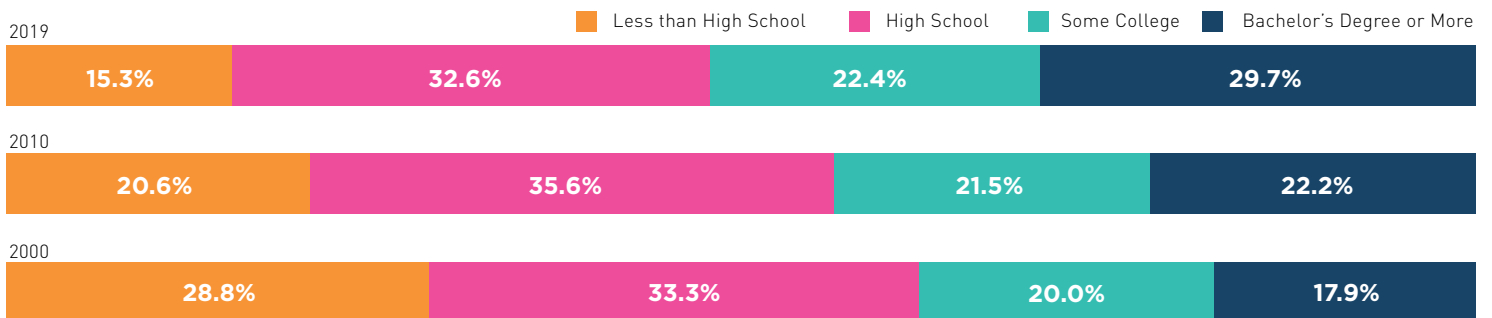
	PHILADELPHIA			SURROUNDING COUNTIES (PA)		
	2009	2019	% CHANGE	2009	2019	% CHANGE
Educational service, health care and social assistance	191,325	227,005	19%	201,017	247,609	23%
Educational services	57,477	58,359	2%	34,030	33,266	-2%
Health care and social assistance	133,848	168,646	26%	166,987	214,343	28%
Ambulatory health care services	29,869	42,342	42%	59,507	76,951	29%
Hospitals	61,295	62,059	1%	38,867	38,892	0%
Nursing and residential care facilities	19,103	17,556	-8%	45,491	49,886	10%
Social assistance	25,821	49,391	91%	23,122	48,615	110%
ALL INDUSTRIES	518,304	595,612	15%	1,046,599	1,149,587	10%

Note: Pennsylvania suburbs include Bucks, Chester, Delaware, and Montgomery counties.

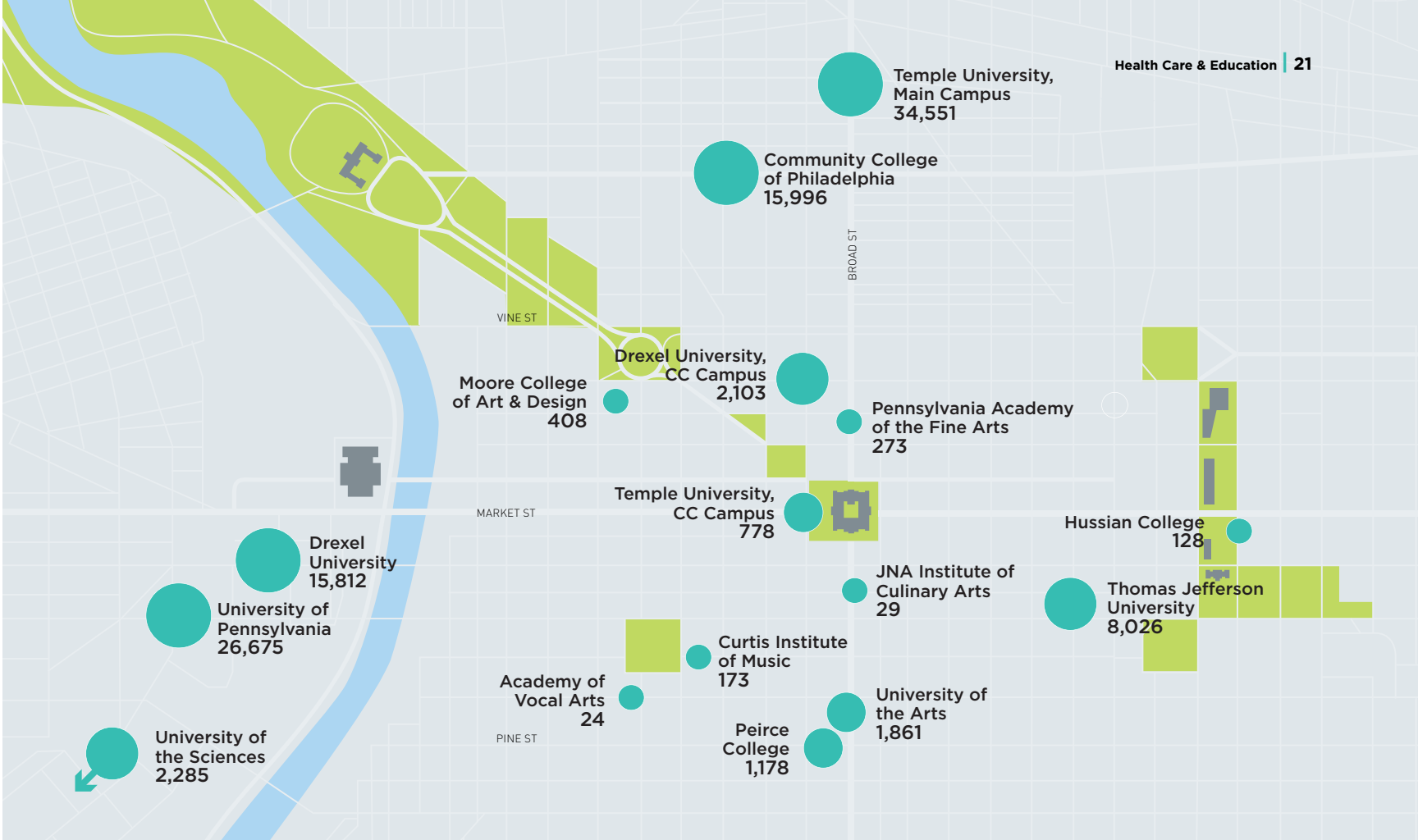
Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages

In the last 20 years, there has been a significant increase in the number of adults with college degrees and a dramatic decline of those without a high school diploma.

Educational Attainment of Philadelphia Residents, Age 25 and Older



Source: U.S. Census Bureau, 2000 and 2010 decennial census, and American Community Survey 2019 five-year estimate



Higher Education Enrollment, Fall 2019

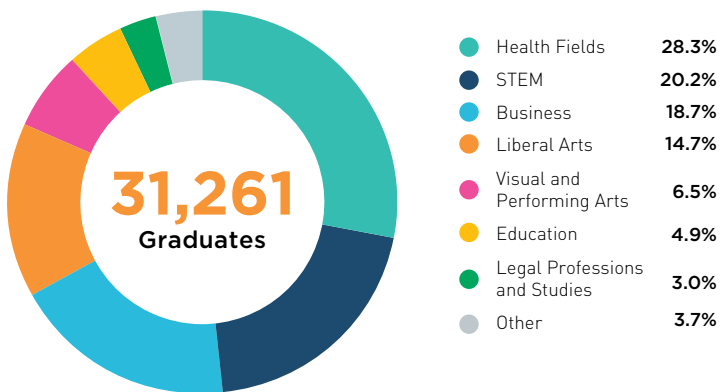
110,300 students

enrolled in higher education institutions in and around Center City

Sources: Temple University Fact Book; Drexel University Factbook, 2018-2019; National Center for Education Statistics.



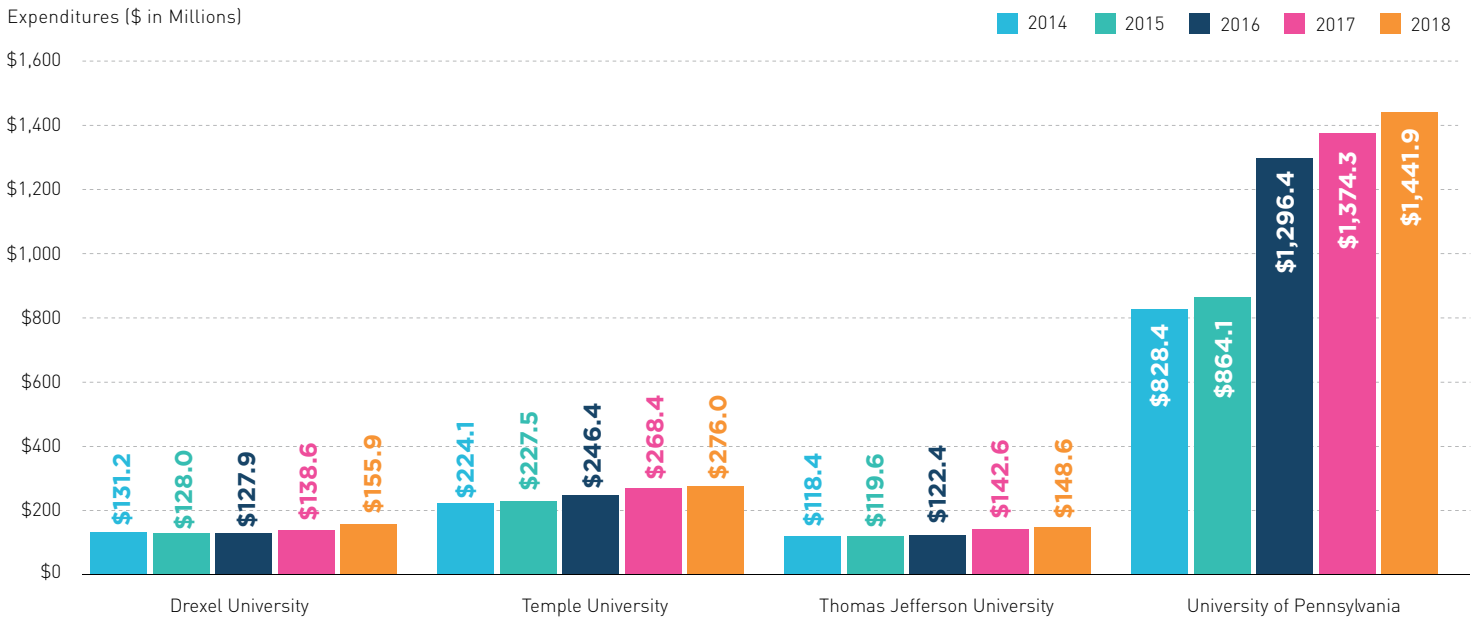
Degrees Conferred by Type, 2019



Source: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System

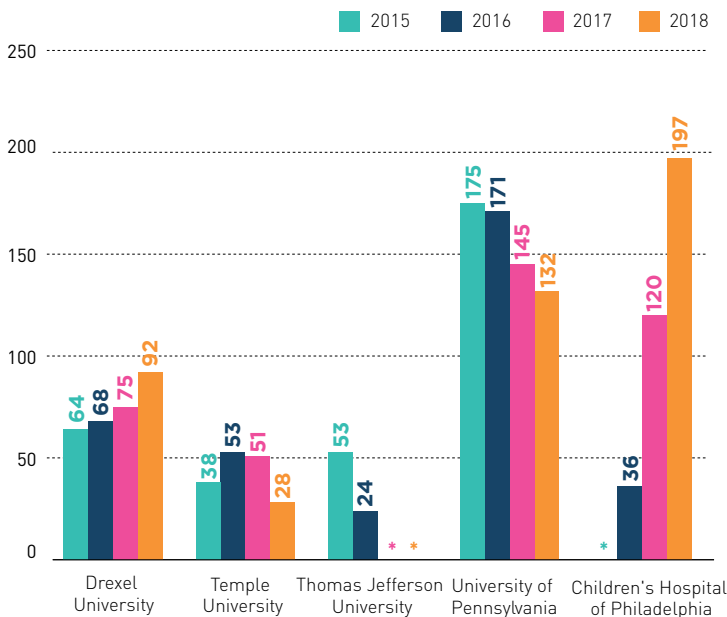
Nearly half of recent college graduates have degrees in health, science, technology, engineering and math.

Research Expenditures at Center City and Adjacent Universities



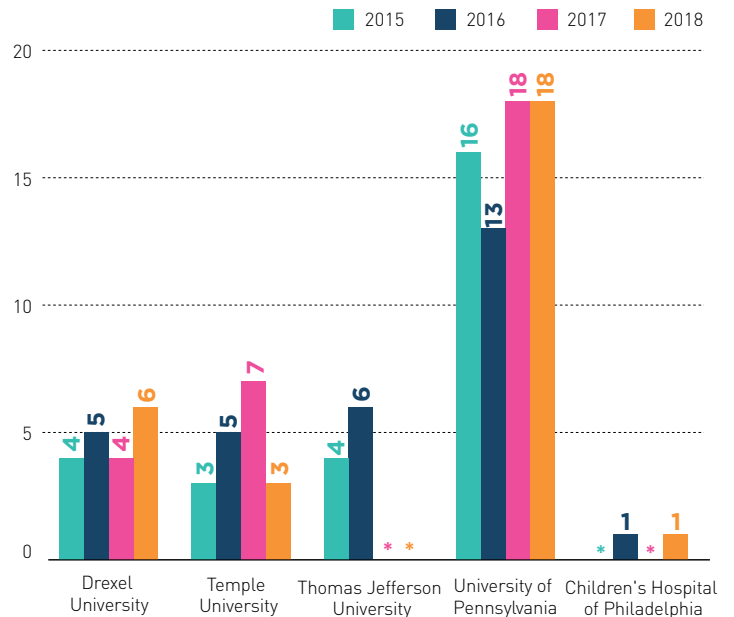
Source: National Science Foundation, National Center for Science & Engineering Statistics, Higher Education R&D Survey

New Patent Applications



Source: Association of Technology Managers, Licensing Activity Survey 2018

Startups



Source: Association of Technology Managers, Licensing Activity Survey 2018