

# **Camden and Its Region: Economic Structure and Trends in the 1990s**

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*Section 1*

## **Introduction and Summary**

### **Purpose**

Recent planning for economic development in Camden has provided useful guidance on general principles and approaches (see, for example, City of Camden, 2000), but there is clearly a need to go farther in spelling out a strategy, including identifying specific industries that might be the focus for business attraction, retention, and growth.

In particular, there is a need to think more carefully about how to reintegrate Camden in the regional economy. Economic development professionals are now clear that planners in cities like Camden will surely miss the point if they look only at the job generating activities that exist within the City's borders. Potentials for internal job growth will depend heavily on what happens to economic activity in surrounding areas. The city's economy will do well only if: (a) the economy of its region does well, and (b) the city itself plays roles that best fit its competitive strengths within the region.

Camden's strategy should thus emphasize understanding and supporting the development of its surrounding region, and then competing to increase its own share of regional growth. To learn how to do this, local planners need a much better understanding of the economic structure and trends in the region than they have today. This report aims to contribute to that understanding. It examines regional data from County Business Patterns (a reliable source of trends for detailed industry categories) for the middle of the boom period in the 1990s: 1992/93 through 1997 (the last year for which comparable data are available).

This report does not attempt to offer a complete economic development strategy. But by identifying a large number of promising industries it provides a listing of ingredients from which such a strategy could be created.

## **Organization**

This report has four additional sections corresponding to the steps taken in conducting the research:

- Section 2 defines the region and major component subregions and then provides background understanding of the regional economy - structure and trends for major traditional sectors in each subregion
- Section 3 focuses on the analysis on promising economic clusters - groupings of linked activities that cut across traditional sectors that are likely to drive the region's economy in the future. It discusses how the cluster concept should be regarded in terms of strategy for Camden and then both defines the clusters and provides data on overall trends.
- Section 4 identifies and reviews characteristics of industries within each of the clusters individually -- key strengths, new potentials, and threatened industries
- Section briefly assesses what these regional opportunities may mean for enhancing employment opportunities for Camden residents.

## **Major Findings and Conclusions**

With employment remaining fairly constant (about 21,000 private nonfarm jobs) through most of the 1990s, Camden City's economy might be characterized as stagnant. Potentials look more hopeful, however, when it is recognized that Camden is still the center of a quite dynamic subregional economy. Metro Camden (including Camden, Gloucester, and Burlington Counties), had 396,000 jobs in 1997, a total which had grown at an annual rate of 2.2% from 1992 to 1997.

That rate is substantially above the growth rates of the states of New Jersey and Pennsylvania as a whole (1.4%-1.5%), and stands in even sharper contrast to the performance of City of Philadelphia which hardly grew at all over the period (+0.1% per year). The

comparable growth rate of other nearby subregions (Philadelphia's suburbs and the other counties in South Jersey), however, was about the same as that for Metro Camden (2.1%).

The service sector dominated Metro Camden's employment growth at this time, (accounting for exactly half of the 8,100 average net increase per year), but there was some growth as well in most other traditional sectors including manufacturing. A more useful way to look at the economy, however, is to examine trends in the *clusters* that are likely to drive the region's growth in the future. Clusters include the major exporters (services as well as goods) and the linked activities that support them.

We identified nine such clusters that are important in the broader region. Their local importance is a function of their comparative size, growth rate, and export orientation. The latter is measured their Location Quotient (LQ); an LQ of 2.0, for example, means that the local cluster or industry's share of total employment is twice the national average (anything above 1.0 can be thought of as being export oriented). Four of these clusters in Metro Camden are strong on all these counts. Local economic development strategists should publicize these strengths and study the factors behind them to better support them in future:

**Business Services:** 33,500 jobs, 7.4% growth/year, LQ = 1.12 (Key component industries include: credit reporting and collection; management and public relations, legal services; engineering and architectural services; mailing, reproduction and stenographic services; and personnel supply services and professional organizations)

**Biomedical Products:** 3,900 jobs, 8.2% growth/year, LQ = 1.30 (Key components include: ophthalmic goods, pharmaceutical production, and testing laboratories)

**Health Services:** 47,000 jobs, 2.5% growth/year, LQ = 1.10 (Key components include: osteopathic physicialns; home helath care services; offices of other health practitioners; offices and clinics of dentists; nursing and personal care facilities; and offices and clinics of medical doctors)

**Transportation/Logistics:** 35,500 jobs, 2.6% growth/year, LQ = 1.22 (Key components include: deep sea transport; public warehousing and storage; water transportation services; miscellaneous transportation services; trucking/courier services, except air; and wholesalers specializing in a variety of types of goods).

Two other clusters are important exporters in Metro Camden, but their employment was declining in the 1990s. Here, local planners should be working to understand and then repair the reasons behind these losses.

**Information Technology:** 18,600 jobs, 1.2% loss/year, LQ = 1.18. (Key components include: search and navigation equipment; telegraph and other communications; communications equipment; computer and data processing services; computer and office equipment; and communications services not elsewhere classified)

**Media/Printing:** 16,000 jobs, 4.1% loss/year, LQ = 1/13 (Key components include: manifold business forms; printing trade services; commercial printing; blankbooks and bookbinding; periodicals; and cable and other pay TV services).

The remaining three clusters are strong elsewhere in the broader region but in Metro Camden they have LQ's below 1.0 and have been declining. They are: finance/insurance (strong in both Philadelphia and its suburbs); universities/research (notable although declining strength in Philadelphia); and tourism/recreation (booming on the South Jersey coast). Local planners should assess the worth of gaining linkages and providing services to these activities.

It should be recognized, however, that Camden does have a strong university base on its own. To take advantage of this base in economic development, it should probably be examined from the point of view as to how it might best serve the other economic clusters in the subregion rather than seeing them as a separate cluster with independent export potential.

The first part of our concluding section evidence suggesting that, even though education levels in Camden City are low compared to those in surrounding jurisdictions, this does not mean the types of jobs being generated by Metro Camden clusters are inaccessible to most Camden residents. Studies elsewhere show that much of the expected job growth even in the advanced clusters can still be handled by persons that have no formal training beyond high school: e.g., 47% for the Biomedical cluster, 50% for the Information Technology cluster, 66% for the Business Services cluster. The emphasis must be squarely on strengthening Camden's workforce development system to link people to the new jobs and enhance their skills over time so they can advance in their careers.

Finally, three themes are offered as key ingredients in the next wave of strategic planning for economic development in the area: (1) the strategy should consider opportunities region-wide but emphasize the critical potential a revitalized Camden City economy would have on the region's prospects; (2) strategic planning should be organized by cluster and deeply involve business leaders within each cluster as key stakeholders and innovators; and (3) actors in the workforce development system (neighborhood and city-wide) should participate in all parts of the process and be accountable for adapting their system to respond to the new strategy.

*Section 2*

## **Regional Structure and Trends**

### **Camden's Region and Subregions**

Through most of the 1990s, the U.S. government defined the metropolitan area of southern New Jersey and southeastern Pennsylvania to include 8 counties, that can be grouped into three subregions (refer to Map 1):

- Metro Camden - Camden, Burlington, and Gloucester Counties
- Philadelphia County
- Pennsylvania suburbs - Bucks, Chester, Delaware, and Montgomery Counties

Because of its interaction with Metro Camden, the counties that surround it (mostly along the coast) and make up the rest of South Jersey, should also be included as a separate subregion. (Map 1)

- Coastal - Ocean, Atlantic, Cape May, Cumberland, and Salem Counties

### **Size and Trends - Subregion Economies**

Each of the four subregions represent sizeable economies in and of themselves (see 1997 data in Table 1 - all mention of employment in this report refers to private non-agricultural employment only; i.e., employment in agriculture and the public sector is not included).

- South Jersey
  - Metro Camden - 396,000 employees (17%)
  - Coastal Counties - 309,000 employees (13%)
- Pennsylvania
  - Philadelphia - 578,000 employees (24%)
  - Suburbs - 1,079,000 employees (46%)

From 1992 to 1997, total employment in the two South Jersey subregions and Philadelphia's Suburbs grew at about the same annual rate (2.1-2.2% range), much faster than the states of Pennsylvania and New Jersey as a whole (1.4% and 1.5% respectively), although slower than the U.S. on average (2.6%). Employment growth in Philadelphia was negligible over that period (0.1% annually).

Camden County had 173,800 employees in 1997 (43% of Metro Camden), with a slower annual growth rate than the subregion (1.6%). The City of Camden then had 21,400 employees (5% of Metro Camden), a number that had remained fairly stable since 1974.

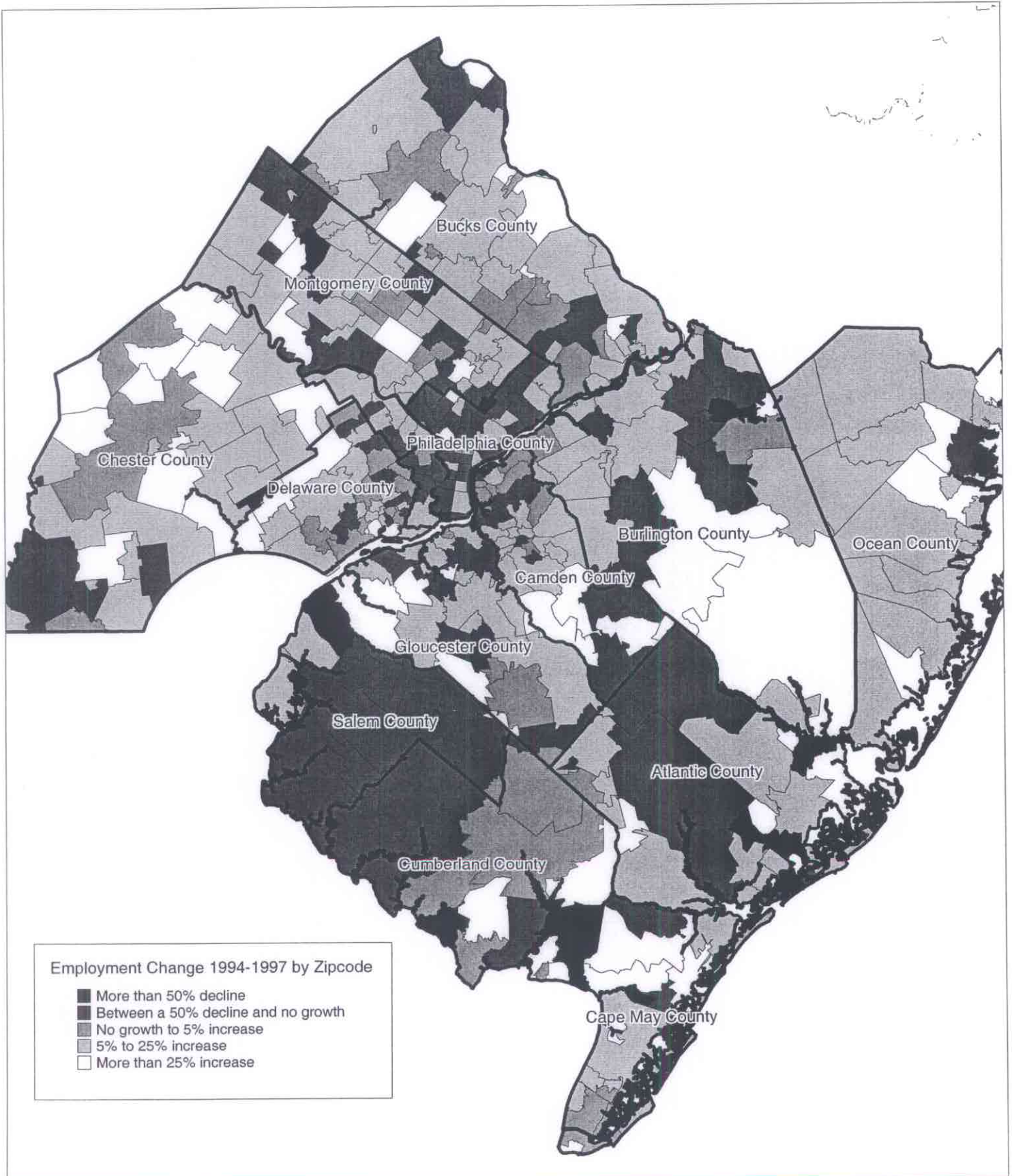
Metro Camden's positive performance in the 1990s was an extension, albeit accelerated, of a much longer period of sustained economic growth. From 1969 through 1997, the area's employment base had grown by 39%. Hughes and Seneca (1999) point out that Metro Camden was not the leader in the state of New Jersey over that period, noting that a group of mid-state counties they refer to as the "wealth belt" had done better (Hunterdon, Mercer, Middlesex, Monmouth, Morris and Somerset, which together experienced a 72 percent growth in employment between 1969 and 1997). Nonetheless, Metro Camden still gained in its share of total state employment over that period: from 11.4% to 12.7%.

Map 1 shows shows 1994-97 employment trends in the region at the zip code level. The picture is clearly not one of uniformity within counties and subregions. In fact there are major differences within all counties. There are some growing areas and some declining areas in each of them, the balances of course differing to yield the subregion averages noted above.

Three of Camden City's zip areas are in the stable category (no growth to 5% increase) and the fourth experienced modest growth over the period. Most of the other areas in Camden County were in one of the growth categories (red) but there was a band of blue (decline) just below the City and another cluster of decline just above the County's southern border. Most of the areas in the rest of the Metro Camden subregion, Gloucester and Burlington Counties, had also grown over the period although they too had some areas of decline.



Map 1: Employment Growth Rates in Camden Region



Source: Zipcode Business Patterns

Among the other subregions, as would be expected given the numbers above, the County with the largest proportion of its zip areas experiencing decline was Philadelphia, but there were also patterns of decline in areas of Delaware and Bucks Counties adjacent to Philadelphia and in some other locations farther west as well. The remaining South Jersey Counties show patterns of great contrast with almost uniform growth in Ocean County and along the coast in general, but with large areas of decline in central Atlantic County and in sizeable portions of Salem and Cumberland Counties.

### **Structure and Growth - Traditional Sectors**

Metro Camden's share of total employment in several sectors is the same as for the region overall (Table 1): 6% in extraction/construction, 14% in manufacturing, 5% in transportation/communication, and 6-7% in finance/insurance/real estate. Metro Camden has higher shares than the region in wholesale trade (10% vs. 6%) and retail trade (23% vs. 19%), but a lower share in services (36% vs. 42%). The largest subcomponents of its service sector are in business services and health services (both at 12% of total employment)

Compared to Metro Camden, the economies of both the South Jersey Coastal Counties and the City of Philadelphia have smaller shares in manufacturing (10-11%) with compensatingly larger shares in services (46%, 51%). Within the service sector Philadelphia has the largest concentrations in business and health, whereas, for the Coastal Counties, the sector is dominated by tourism related employment (particularly in the Atlantic City hotels), with health services placing being a distant second. The sectoral structure of the Suburbs on the Pennsylvania side is more similar to that of Metro Camden, but with a somewhat higher share in manufacturing (16% vs. 14%), modestly more in services and less in trade.

Between 1992 and 1997, Metro Camden was the only one of the four subregions to gain employment in all sectors (Table 2). The most rapid growth occurred in miscellaneous services (7.9% per year), construction (3.9%) and wholesale trade (3.7%).

Growth patterns in the other subregions were quite distinct. In Philadelphia, notable losses in construction, manufacturing, and both wholesale and retail trade were just barely compensated for by increases in various service categories and transportation/communication. The Coastal Counties saw the most rapid increases in construction and health and tourism services, with gains marginally offset by losses in manufacturing and finance/insurance/real estate. The Pennsylvania Suburbs experienced growth dominantly in services (business, tourism and health) accompanied by modest losses in manufacturing.

Table 1  
CAMDEN IN THE REGIONAL ECONOMY, 1997

|                                    | South Jersey  |              |                  | Pennsylvania  |              |
|------------------------------------|---------------|--------------|------------------|---------------|--------------|
|                                    | Camden County | Metro Camden | Coastal Counties | Philadel-phia | Suburbs      |
| <b>Employment (thousands)</b>      |               |              |                  |               |              |
| Extraction/Construction            | 10            | 23           | 19               | 11            | 65           |
| Manufacturing                      | 24            | 57           | 31               | 61            | 178          |
| Transportation/Communic.           | 8             | 20           | 19               | 39            | 41           |
| Wholesale Trade                    | 13            | 38           | 11               | 25            | 78           |
| Retail Trade                       | 37            | 92           | 75               | 85            | 201          |
| Finance/Insur./Real Estate         | 10            | 25           | 14               | 65            | 88           |
| <b>Services</b>                    | <b>72</b>     | <b>141</b>   | <b>141</b>       | <b>293</b>    | <b>428</b>   |
| Business/Professional              | 23            | 49           | 18               | 77            | 165          |
| Tourism/Recreation                 | 4             | 8            | 59               | 15            | 22           |
| Health Services                    | 25            | 47           | 42               | 103           | 122          |
| Other Services                     | 20            | 37           | 22               | 97            | 119          |
| <b>Total</b>                       | <b>174</b>    | <b>396</b>   | <b>309</b>       | <b>578</b>    | <b>1,079</b> |
| <b>Percent of Total Employment</b> |               |              |                  |               |              |
| Extraction/Construction            | 6             | 6            | 6                | 2             | 6            |
| Manufacturing                      | 14            | 14           | 10               | 11            | 16           |
| Transportation/Communic.           | 4             | 5            | 6                | 7             | 4            |
| Wholesale Trade                    | 8             | 10           | 4                | 4             | 7            |
| Retail Trade                       | 21            | 23           | 24               | 15            | 19           |
| Finance/Insur./Real Estate         | 6             | 6            | 4                | 11            | 8            |
| <b>Services</b>                    | <b>41</b>     | <b>36</b>    | <b>46</b>        | <b>51</b>     | <b>40</b>    |
| Business/Professional              | 13            | 12           | 6                | 13            | 15           |
| Tourism/Recreation                 | 2             | 2            | 19               | 3             | 2            |
| Health Services                    | 15            | 12           | 13               | 18            | 11           |
| Other Services                     | 11            | 9            | 7                | 17            | 11           |
| <b>Total</b>                       | <b>100</b>    | <b>100</b>   | <b>100</b>       | <b>100</b>    | <b>100</b>   |

Source: County Business Patterns

Table 2  
CAMDEN REGION EMPLOYMENT CHANGE, 1992-97

|   | South Jersey  |                     |                  | Penn. Side    |         |
|---|---------------|---------------------|------------------|---------------|---------|
|   | Camden County | All Metro. Counties | Coastal Counties | Philadel-phia | Suburbs |
| <i>Percent change in employment per year, 1992-97</i>         |               |                     |                  |               |         |
| Extraction/Construction                                       | 3.4%          | 3.8%                | 5.2%             | -2.5%         | 3.0%    |
| Manufacturing   | 0.6%          | 0.5%                | -0.7%            | -3.2%         | -0.9%   |
| Transportation/Communic.                                      | -0.1%         | 2.6%                | -0.1%            | 1.1%          | 2.8%    |
| Wholesale Trade   | -1.8%         | 3.7%                | 2.8%             | -3.8%         | 2.5%    |
| Retail Trade  | 0.5%          | 1.4%                | 2.4%             | -0.9%         | 1.4%    |
| Finance/Insur./Real Estate                                    | -2.9%         | 0.7%                | -3.2%            | 1.1%          | 1.8%    |
| Services  | 4.0%          | 3.1%                | 2.5%             | 1.3%          | 3.8%    |
| Business/Professional   | 1.7%          | 1.4%                | 1.3%             | 2.9%          | 6.4%    |
| Tourism/Recreation  | -1.0%         | 0.5%                | 2.6%             | 6.1%          | 4.7%    |
| Health Services   | 2.9%          | 2.4%                | 2.6%             | 2.0%          | 3.0%    |
| Other Services  | 10.5%         | 7.9%                | 3.3%             | -1.0%         | 1.2%    |
| Total   | 1.6%          | 2.2%                | 2.1%             | 0.1%          | 2.1%    |
| <i>Change in number of jobs (thousands) per year, 1992-97</i> |               |                     |                  |               |         |
| Extraction/Construction                                       | 0.3           | 0.8                 | 0.8              | (0.3)         | 1.8     |
| Manufacturing   | 0.1           | 0.3                 | (0.2)            | (2.2)         | (1.7)   |
| Transportation/Communic.                                      | (0.0)         | 0.5                 | (0.0)            | 0.4           | 1.1     |
| Wholesale Trade   | (0.2)         | 1.3                 | 0.3              | (1.1)         | 1.8     |
| Retail Trade  | 0.2           | 1.2                 | 1.7              | (0.7)         | 2.7     |
| Finance/Insur./Real Estate                                    | (0.3)         | 0.2                 | (0.5)            | 0.7           | 1.5     |
| Services  | 2.6           | 4.1                 | 3.3              | 3.8           | 14.5    |
| Business/Professional   | 0.4           | 0.7                 | 0.2              | 2.1           | 8.8     |
| Tourism/Recreation  | (0.0)         | 0.0                 | 1.4              | 0.8           | 0.9     |
| Health Services   | 0.7           | 1.0                 | 1.0              | 1.9           | 3.4     |
| Other Services  | 1.5           | 2.3                 | 0.7              | (1.0)         | 1.4     |
| Total   | 2.6           | 8.2                 | 5.4              | 0.6           | 21.6    |

Source: County Business Patterns

Overall, services dominated the region's growth in the 1990s (as it did in most of the U.S.). The sector accounted for 71% of the 36,000 average annual net increase in employment region-wide from 1992 to 1997.

*Section 3*

## **Economic Clusters Defined**

### **Identifying the Region's Economic Growth Clusters**

When planning economic development, it is important to distinguish between industries that export goods and services outside the region (the industries that create growth) and those that primarily serve current residents (for example, much of construction, retail trade, and personal services).

In recent years, the value in looking at the exporters as linked *clusters* of activity has been recognized. For example, the cluster that is driven by the export of electronic equipment and software (information technology) would include all of the competing producers plus all of the firms that have become specialized in supporting them -- trucking and wholesaling enterprises, retailers, lawyers and engineers, university departments, etc., that focus on serving the hi-tech sector.

Looking at the cluster as a whole helps you identify gaps in service provision and barriers to expansion. The most effective local actions to expand exports of electronic equipment, for example, might lie in strengthening other activities in the cluster (establishing a new institute at a local university, facilitating the expansion of capacity in specialized warehousing and distribution enterprises, etc.) rather than actions dealing with the producers directly.

A U.S. sponsored study in the mid-1990s (DRI/McGraw Hill, 1995) identified 19 clusters judged most likely to drive the national economy over the coming decade. The study pointed out

that these 19 clusters employed 57% of the nation's workforce, but accounted for 61% of its total output and 78% of its international exports.

The study rated all U.S. metropolitan regions on their strength with respect to each of these clusters. The greater Philadelphia region came out as one of the top 20 areas in the nation for 13 of these clusters, but it had only been experiencing growth in seven. We see these seven as major engines of the region's future growth. But there are two others from the 19 (\*\* below) we would also put in that category because of positive growth in the region more recently (also identified as "Growth Clusters" for New Jersey by the State Government – see State Research and Planning Division, 2000.). The leading role of service industries, highlighted by the sectoral data noted earlier, stands out. These nine are:

1. Business Services
2. Finance/Insurance
3. Media/Printing
4. Universities/Research
5. Information Technology\*\*
6. Biomedical Products
7. Health Services
8. Tourism/Recreation
9. Transportation/Logistics\*\*

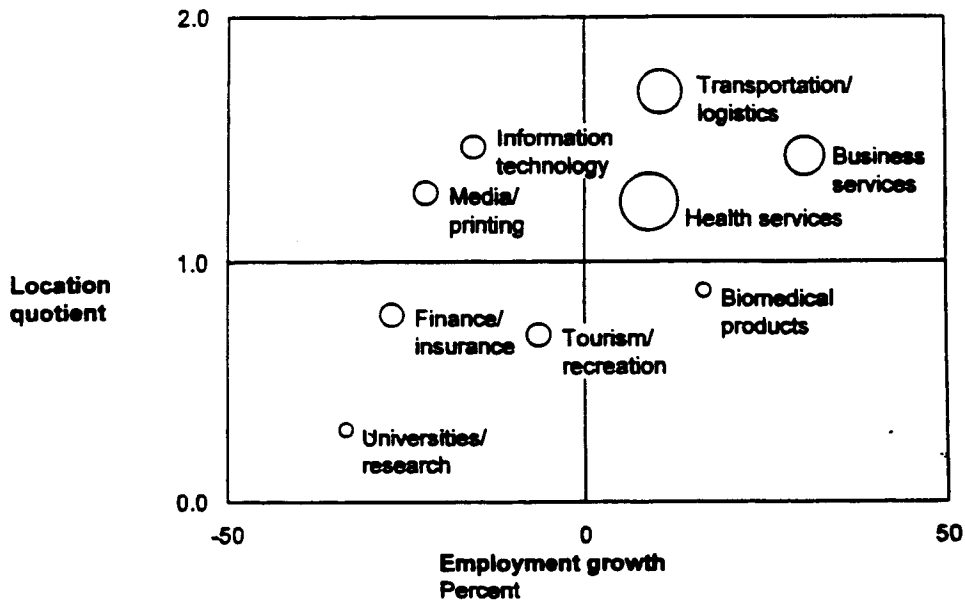
### **Strategic Approach for Camden - Overview**

Economic development should focus on cluster opportunities, but not exclusively so. In fact, Metro Camden should simultaneously follow three strategic approaches:

1. Further strengthen activity in growth clusters where it already has a competitive advantage.
2. Strengthen activity in ways that support growth clusters that are more powerful in other parts of the region.
3. Capture a larger share of the resident serving activity generated by the overall growth of the regional economy: e.g., construction, retail.

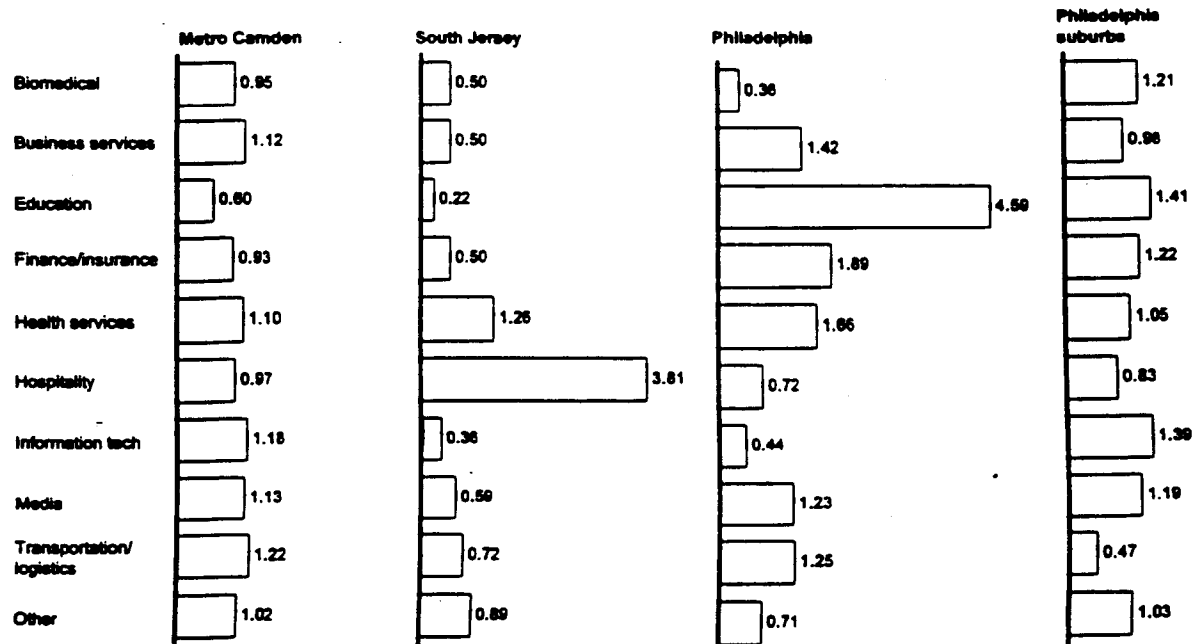
Camden should seek to increase its share of all economic activities it can perform effectively regardless of whether they are "glamour" industries" or not. For example, attractive industries may be both "high-wage" and "low-wage." Often having a mix of the latter is important

**IMPORTANT CLUSTERS IN METRO CAMDEN'S\* ECONOMY**



Note: Size of circle represents total employment  
 \* Metro Camden includes Camden, Burlington, and Gloucester counties

**LOCATION QUOTIENTS ACROSS REGION**





**Table 3**  
**CLUSTERS IN THE ECONOMY OF CAMDEN'S REGION**

| Clusters                 | South Jersey        |                      |                  |                     |                      |                  | Pennsylvania        |                      |                  |                     |                      |                  |
|--------------------------|---------------------|----------------------|------------------|---------------------|----------------------|------------------|---------------------|----------------------|------------------|---------------------|----------------------|------------------|
|                          | Metro Camden        |                      |                  | Coastal             |                      |                  | Philadelphia        |                      |                  | Suburbs             |                      |                  |
|                          | Employ.<br>(000) 97 | Location<br>Quot. 97 | Gr.Rate<br>93-97 | Employ.<br>(000) 97 | Location<br>Quot. 97 | Gr.Rate<br>93-97 | Employ.<br>(000) 97 | Location<br>Quot. 97 | Gr.Rate<br>93-97 | Employ.<br>(000) 97 | Location<br>Quot. 97 | Gr.Rate<br>93-97 |
| Business Services        | 33.5                | 1.12                 | 7.4%             | 11.5                | 0.50                 | 2.0%             | 61.8                | 1.42                 | 2.4%             | 80.0                | 0.98                 | 5.5%             |
| Finance/Insurance        | 17.1                | 0.93                 | -0.7%            | 7.1                 | 0.50                 | -8.4%            | 50.6                | 1.89                 | -2.2%            | 61.1                | 1.22                 | 2.1%             |
| Media/Printing/Publish.  | 16.0                | 1.13                 | -4.1%            | 6.5                 | 0.59                 | 2.3%             | 25.3                | 1.23                 | 1.8%             | 45.9                | 1.19                 | 5.5%             |
| Universities/Research    | 1.0                 | 0.16                 | -5.5%            | 1.0                 | 0.22                 | -9.7%            | 40.6                | 4.59                 | -4.4%            | 23.3                | 1.41                 | 4.4%             |
| Information Technology   | 18.6                | 1.18                 | -1.2%            | 4.4                 | 0.36                 | 0.0%             | 10.2                | 0.44                 | -3.2%            | 59.8                | 1.39                 | 4.0%             |
| Biomedical Products      | 3.9                 | 1.30                 | 8.2%             | 2.0                 | 0.87                 | -4.8%            | 1.7                 | 0.38                 | 8.0%             | 14.3                | 1.75                 | 1.5%             |
| Health Services          | 47.0                | 1.10                 | 2.5%             | 42.0                | 1.26                 | 2.0%             | 103.4               | 1.66                 | 1.9%             | 121.7               | 1.05                 | 3.0%             |
| Tourism/Recreation       | 28.2                | 0.91                 | -0.3%            | 98.4                | 4.07                 | 9.5%             | 32.3                | 0.71                 | 0.0%             | 68.0                | 0.80                 | 1.5%             |
| Transportation/Logistics | 35.5                | 1.22                 | 2.6%             | 14.2                | 0.62                 | 0.2%             | 37.7                | 0.88                 | 0.0%             | 73.5                | 0.92                 | 2.9%             |
| Total                    | 200.8               |                      | 1.6%             | 187.2               |                      | 4.6%             | 363.6               |                      | 0.1%             | 547.8               |                      | 3.4%             |
| Cluster % of total       | 50.8                |                      |                  | 60.6                |                      |                  | 62.9                |                      |                  | 50.8                |                      |                  |
| Other Sectors            | 194.8               |                      | 2.8%             | 121.5               |                      | -1.9%            | 214.4               |                      | 0.2%             | 531.3               |                      | 0.9%             |
| Total                    | 395.6               |                      | 2.2%             | 308.7               |                      | 1.8%             | 578.0               |                      | 0.1%             | 1,078.9             |                      | 2.1%             |

to attracting the former. Also, people starting with low skills normally move up from low- to middle- to high-wage jobs, rather than gaining a high wage job initially.

Strength in any cluster or industry can be measured by: (1) its absolute size (large number of employees); (2) recent trend (positive growth rate); and (3) level of specialization/export orientation. The latter, in many ways, is most important. It is measured by the Location Quotient (LQ): the share of any area's total employment in a specific cluster or industry divided by the comparable share for the nation as a whole.

- For example, Metro Camden has an LQ of 2.73 in "printing trade services" which means it has 2.73 times as many jobs in that industry as it would have if its share had been the same as the national average (any LQ above 1.0 suggests the local industry is likely to be an exporter in that field).

### **Cluster Potentials -- Main Themes**

Taking all four subregions together, the nine clusters account for 55 percent of total employment. They had a 1993-97 annual employment growth rate of 2.3%, well above the 0.7% rate for all other sectors of the economy. (Derived from Table 3). It should be emphasized that the methods used to allocate industries to clusters do not permit fine precision (e.g., we could not divide accountants up according to the specific clusters they serve), but it should serve as a reasonably good approximation for planning purposes -- see Annex A.

In Metro Camden itself, the overall clusters exhibiting the greatest strength are: biomedical (LQ=1.30), transportation/logistics (LQ=1.22), business services (LQ=1.12), and health services (LQ=1.10) -- all four of which evidenced notable growth in the 1990s (see Table 3, and Figures 2 and 3). It is of interest that Metro Camden is the only one of the four subregions other than the Pennsylvania suburbs, in which information technology is a true specialization (LQ=1.18), although that cluster lost employment modestly in the area between 1992 and 1997. The cluster focused around media/printing is also a traditional strength in Metro Camden (LQ=1.13) but it suffered a more sizeable decline there over the period.

The strongest clusters elsewhere in the region (toward which Metro Camden might try to relate more effectively in future) are also those that both have high LQs and experienced growth in the 1990s.

- Business services (Philadelphia), media/printing (Philadelphia and its Suburbs); finance/insurance, universities/research, and information technology (only in the

Pennsylvania Suburbs); tourism/recreation (Coastal Counties); and health services (all subregions).

There are two other clusters in Philadelphia with very high LQs that should also be paid attention to, however, even though they were losing employment over 1992-97: universities/research (highest LQ on the table at 4.59) and finance/insurance.

#### Section 4

## Cluster Potentials

Planning a complete strategy for economic development requires working with leaders and analysts in each cluster to examine strengths, weaknesses, opportunities and threats, considering the cluster's component industries and their interactions comprehensively. Looking at summary data on the components, however, can be a useful starting point (see Tables A1 through A9 in the Appendix). In the following sections, we note key industries, and some strategic implications for Camden, for each of the region's growth clusters.

To simplify our review of cluster performance, it may help to consider individual component industries according to where they fall in charts like Figure 2.

- **Key strengths.** Industries in the upper right-hand box can be viewed as *key strengths*, in that they are both important export specialties (LQ above 1.0) and have experienced growth in employment.
- **New potentials.** Industries in the lower right box are worth watching because they belong to the cluster and, although they do not yet have LQs above 1.0, they have been growing.
- **Threatened.** Industries in the upper left-hand box can be considered as possible threats meriting policy concern because, on the one hand, they are important to the area's export base (LQ above 1.0) but, on the other, they have been losing employment.

- Industries in the lower left-hand box generally warrant less attention because they do not have major importance as exporters (low LQ), and their employment levels have been declining.

### **Business Services**

Metro Camden has a number of key strengths in business services (Table A1). Credit reporting and collection stands out because of its high LQ and growth rate. However three additional groups are larger and have been performing quite well: management and public relations, legal services, and engineering and architectural services. Although smaller, mailing, reproduction and stenographic services also fall into the key strength group. The cluster's only threatened group by the above definition is miscellaneous equipment rental and leasing. New potentials include personnel supply services and professional organizations.

In the overall region, the business services cluster is also strong in Philadelphia and its suburbs. In the suburbs, key strengths include all of the industries in that status in Metro Camden (except legal services) and there are no threatened industries. In Philadelphia itself the key strengths are engineering and architectural services; accounting, auditing and bookkeeping; and mailing and reproduction. Some very large traditional strengths there are now in the threatened category, however, including legal and professional services and management and public relations. This cluster does not have a high LQ in the Coastal Counties subregion.

### **Finance/Insurance**

The Finance/Insurance cluster has been traditionally powerful in the overall region, particularly on the Pennsylvania side, although it appears to have lost ground in the 1990s (Table A2). Metro Camden does have some reasonably large key strengths, however: mortgage bankers and brokers; business credit institutions; fire, marine, and casualty insurance. One large threatened sector is commercial banks, but all other threatened industries and new potentials are fairly small.

Philadelphia has been losing employment in some very important subcomponents (e.g., commercial banks, life insurance) but does have key strengths in medical service and health insurance, and security and commodity services. The suburbs have also suffered an important loss in life insurance but have made impressive gains in such sectors as investment offices; fire, marine, and casualty insurance; mortgage bankers and brokers; miscellaneous investing;

holding offices; and business credit institutions. Again, South Jersey's Coastal Counties are not much of a player in this cluster.

### **Media/Printing**

This cluster too has been one of the economic foundations of all three metropolitan subregions (Table A3). Recent performance appears to have favored the Pennsylvania side. Philadelphia has sizeable key strengths in miscellaneous printing, books, miscellaneous business services, motion picture production, and cable and other pay TV services. Its only important threat is newspapers. Key strengths for the Pennsylvania suburbs are periodicals, blankbooks and bookbinding, and miscellaneous business services.

Metro Camden has only one large key strength in this cluster (commercial printing) but several smaller industries look promising (blankbooks and bookbinding, periodicals, cable and other pay TV services). It has two important subindustries that have been losing employment of late, however: manifold business forms, and printing trade services. Vitality in the latter is particularly important to the local health of the cluster overall.

### **Universities/Research**

The data on this cluster as defined in Table A4 shows that Philadelphia has dominated the region in this field but has been losing ground in it of late. Although vocational schools represent a key strength in both New Jersey subregions, only the Philadelphia suburbs have been gaining employment in the aggregate. The problem, however, is that these data do not include public instructional and research institutions and without them it is very difficult to assess strengths and weaknesses reliably.

Aside from this data problem, we think that as far as Metro Camden is concerned this cluster should be looked at in a different way from the others. Although they may not have the national prominence of the major Philadelphia universities, Rutgers, Rowan, and the Community College in Metro Camden are extremely important assets. To take advantage of them in economic development, they should probably be examined from the point of view as to how they might best serve the other economic clusters in the subregion rather than seeing them as a separate cluster with independent export potential.

## Information Technology

As noted earlier, this cluster as a whole has an LQ above 1.0 only in Metro Camden, where it has been declining, and the Pennsylvania suburbs, where it has been growing (Table A5). In Metro Camden, its only key strengths as we have defined them are in fairly small industries: telegraph and other communications, and communications services not elsewhere classified. The subregion should probably focus instead on how to become more competitive in its larger threatened industries (large and losing employment in the 1990s): computer and data processing services; search and navigation equipment; communications equipment; telephone communication; and computer and office equipment. Electronic components/accessories, however, is one new potential that should be paid attention to.

Employment in this cluster in the Pennsylvania suburbs adds to 59,800; just over three times the size of the cluster in Metro Camden. The computer and data processing services there, alone, has 33,100 employees. Clearly, this represents Camden's local competition. Study is warranted to understand how Camden can gain back some of the market share it was losing in the mid-1990s.

## Biomedical

The Biomedical cluster is still small in Metro Camden (3,900 jobs) but it exhibited probably the best performance of all clusters in the subregion in the 1990s (overall LQ of 1.30 and 8.2% annual growth rate -- Table A6). Three component industries had LQ's above 1.0: ophthalmic goods, pharmaceuticals, and testing laboratories. The local competition in this field is again the Pennsylvania suburbs (LQ of 1.75) although the cluster was not growing as rapidly there as it was in Metro Camden (only 1.5% per year).

## Health Services

This cluster is the largest of the nine in the region as a whole (314,200 jobs) and in all three metropolitan subregions (Table A7). It has an LQ above 1.0 in all subregions, the highest being 1.66 in Philadelphia (compared to 1.10 in Metro Camden). Mid-90s annual employment growth rates in the cluster, however, were fastest for Metro Camden (2.5%) and the Pennsylvania suburbs (3.0%).

Metro Camden also has some impressive specialties in this mix. Key strengths, where its LQs are higher than for any other subregions, are osteopathic physicians (LQ = 7.92), home

health care services (1.43), offices of other health practitioners (1.24), offices and clinics of dentists (1.23). Other key strengths include nursing and personal care facilities and offices and clinics of medical doctors (both at 1.06). By far the largest subsector in Metro Camden is hospitals (18,800 out of 47,000 jobs), but it does not have a high export orientation (1.00).

### **Tourism/Recreation**

The only subregion with significant power in this cluster (LQ above 1.0) is South Jersey's Coastal Counties. Employment in the cluster there totals 98,400 (43 percent of the total in the broader region) with an LQ of 4.07; 77,200 of these jobs are in one industry, hotels and motels (LQ = 16.02).

### **Transportation/Logistics**

This is the cluster in which Metro Camden is most specialized (LQ of 1.22 compared to levels well below 1.0 in the other three subregions) and which is its second largest cluster employer (35,500 jobs -- Table A9). It has a surprisingly large number of key strengths, including: deep sea transport (domestic and foreign); public warehousing and storage; miscellaneous transportation services; trucking and courier services, except air (the largest component industry); and wholesalers specializing in a variety of types of goods. The specific wholesaling specialties that qualify in this regard are: paper and paper products, furniture and home furnishings; motor vehicles, parts and supplies; lumber and construction materials; professional and commercial equipment; miscellaneous durable goods; and hardware, plumbing and heating equipment. The threatened industries in this group include water transportation services and wholesaling specialized in electrical goods, chemicals and allied products, and drugs, proprietaries and sundries. The cluster also has some interesting new potentials in Metro Camden: particularly, freight transportation arrangement, and wholesaling in petroleum and petroleum products.



*Section 5*

## **Conclusions – Jobs for Camden Residents**

This concluding section does two things. First, it responds to the question as to whether Camden residents are likely to be qualified to access the types of new jobs being generated in the Metro Camden subregion. Finding that there appear to be no major mismatches in this regard, it goes on to suggest some themes for future strategic planning for economic development in Metro Camden.

### **Camden Residents and Metro Camden Job Growth**

With employment remaining fairly constant (about 21,000 private nonfarm jobs) through most of the 1990s, Camden City's economy might be characterized as stagnant. Potentials look more hopeful, however, when it is recognized that Camden is still the center of a quite dynamic subregional economy. Metro Camden's job base grew at an attractive rate in the 1990s.

The purpose behind this report, however, is to contribute to economic development that can realistically benefit the residents of Camden City, not regional economic development per se. A critical question then, is whether the job growth in the clusters and other economic sectors in Metro Camden discussed in earlier sections is truly accessible to Camden City residents, large portions of whom face substantial barriers to employment. In 1990, only 46% of Camden City residents over the age of 16 were employed; above the 40% average for Philadelphia's high-poverty neighborhoods, but well below the 66% average for rest of Metro Camden. At that

time, exactly half of Camden City residents above the age of 25 had not graduated from high school; a rate slightly better than the 51% average for high-poverty neighborhoods in Philadelphia, but considerably worse than the 20% average for the suburban portions of Metro Camden).

Even so, two pieces of evidence suggest that types of new jobs being generated in Metro Camden are not out of range for many City job-seekers. The first is the fact that suprisingly large shares of the new jobs generated in even the leading clusters in our economy (as noted above) can be handled by workers who do not have advanced education and training beyond the high school level. Clearly, education to significantly develop the skills of those who live in Camden's tough neighborhoods warrants a very high priority, but for a number of years to come the economy will be producing many jobs that can be handled by workers without advanced training.

The U.S. Bureau of Labor Statistics (BLS) estimates future employment growth for detailed occupations within each industry at the national level (sources are cited in Annex A). A recent study for metropolitan Washington (Turner, Rubin and Kingsley, 1998) translated those estimates into tables showing expected new jobs by the training levels required to handle them in clusters defined similarly to those identified above. The study found that, on average, 63% of the expected job growth in these leading clusters could be handled by workers that had some on-the-job training or work experience, but no formal training beyond the high school level (compared with a yet higher average of 75% in the more traditional sectors of the economy).

The share in this category (no formal training beyond high school required) was 37% for the Universities/Research cluster, 47% for the Biomedical cluster, 50% for the Information Technology cluster, 66% for the Business Services cluster, 77% for the Media/Printing cluster, and 91% for the Tourism/Recreation cluster.

If the the same translation was performed for Metro Camden the exact results would turnout somewhat differently, but it is unlikely that the overall proportions would vary substantially from those just stated since the composition of the clusters is similar. It is most probable that the majority of new jobs created in Metro Camden over the next several years can be filled by workers without formal training beyond high school.

The second relevant piece of evidence, is that Camden City residents did indeed benefit from the economic boom of the 1990s, even if not to the same extent as those of neighboring communities. According to BLS estimates, Camden's unemployment rate remained outrageously high in 1999: 13.2%, more than three times the 4.2% national rate. However, 13.2% still represents a marked improvement from Camden's peak unemployment rate of 24.2%

in 1992 (which also was about three times the national rate at that time). In other words, a significant share of unemployed Camden residents did obtain jobs during that period, many of them presumably in the surrounding counties.

To be sure, 13.2% is an extremely high unemployment rate, suggesting that many Camden residents are not now competing successfully in the Metro Camden employment market. High priority is indeed warranted for actions that will further reduce the City's still high unemployment: (1) substantially strengthening local workforce development programs; (2) effective economic development initiatives that will allow the City to capture a larger share of Metro Camden's growth within its own boundaries; and (3) a serious examination of transportation options that would help City job-seekers gain access to a larger share of the job openings in the surrounding counties. And Metro Camden needs to better organize to sustain its dynamism as the national economy is cooling off. Nonetheless, it seems doubtful that *the types of jobs* being generated in Metro Camden represent a major problem in this regard. Trying to attract more businesses that have yet lower skill requirements than the current average would not seem an attractive approach.

### Themes for Future Strategic Planning

This report is not the place to suggest in any detail how strategic planning for economic development in the Camden region should proceed. However, keeping in mind the importance of the issue discussed above (jobs for Camden residents), we suggest three themes we believe should be key guideposts in that process.

**1. *The strategy should consider opportunities region-wide but emphasize the critical potential a revitalized Camden City economy would have on the region's prospects.*** Because of the many social, economic, and physical problems of the City of Camden in recent years, there has been a tendency for some civic and business leaders outside of the city to promote the doughnut and say as little as possible about the hole. Ultimately, this approach sure to fail. To succeed in this era of global competition, regional economies need healthy urban centers. Most effective clusters include some types of activities that perform best in high-density urban settings working hand-in-hand with others that find suburban settings more hospitable. A good example, is information-technology where routine production activities usually locate in the suburbs, but have a strong dependence on a continuing stream of creative "content development" which normally does best in urban environments (where face-to-face communication is easier and urban amenities attract the younger workers who make up much of the content development workforce).

Recent studies suggest that the barriers to Camden City's revitalization can realistically be addressed (McKinsey and Company and the Annie E. Casey Foundation, 2001). The next wave of strategic planning for economic development in Metro Camden ought to focus on understanding the linkages between economic functions that perform best in different types of locations within the region, and then give emphasis to revitalizing the center in a way that contributes most effectively to the competitive position of the region as a whole.

**2. Strategic planning should be organized by cluster and deeply involve business leaders within each cluster as key stakeholders and innovators.** Across America's regions, business leaders are increasingly playing leading roles in economic development. Lessons from a number of cities suggest that this works best when the planning process is organized by cluster. This usually means a series of meetings that focus on problems and opportunities in each cluster separately, followed by a few combined meetings and staff work that bring together findings and recommendations from the different clusters and forge them into a coherent action program.

The separate cluster meetings often bring together key players who, although they all may be contributors to the same set of economic product outcomes, have never met each other before: producers, suppliers, distributors, specialized professionals (lawyers, accountants, public marketers), etc. Because they are the people who best understand different aspects of the same economic process, their joint discussion of issues and barriers to expansion is likely to be both pragmatic and creative. They will see opportunities for change that the most skilled economic development generalist would miss and they will be able to identify corrective actions that are more likely to be workable.

And they will start thinking of themselves and their roles differently. One set of meetings of the Tourism/Recreation cluster in Washington DC, for example, brought together for the first time hotel people, restaurant people, museum people, theater people, neighborhood culture people, arts people, etc. They had never before thought about their linkages to each other and their common objectives, but once they met, their understanding of a new joint-mission was almost immediate.

**3. Actors in the workforce development system (neighborhood and city-wide levels) should participate in all parts of the process and be accountable for adapting their system to respond to the new strategy.** Historically, theories of economic development tended to focus on influencing patterns of capital investment. Today, front and foremost is the recognition that the quality of an area's workforce may well have more impact on its future economic growth. We have said above that many of the types of jobs being created in Metro Camden have comparatively low skill requirements and should be accessible to large numbers of

Camden residents. Nonetheless, there is little doubt that the low current skill levels of so many Camden residents acts as a drag on the economy of the Metro Camden region overall. Improving resident capacities in the City must be among the highest priorities of the local economic development program.

Implementing this theme will require that workforce development issues feature prominently in the discussions of all working groups in the planning process (individual clusters and overall) and that people who a part of the workforce development system at all levels participate directly in the process throughout.

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## ANNEX A

# **Cluster and BLS Methodologies**

### **The Cluster Approach**

As promoted by Porter (1996) and others, the cluster concept has become one of the most popular frameworks for understanding local economies in the context of strategic planning. Among the primary benefits is that the examination of the linkages between detailed industries helps to point out both opportunities and threats to performance that might otherwise be buried in the data. It helps to identify institutional and technical gaps that need to be filled to improve any cluster's competitive position.

The concept, however, is difficult to implement in practice. First, you would need measures (employment, sales, etc.) for activity groups at a very fine level of detail. For example, you would like to be able to separate accountants that specialize in work for biotech firms from those that service real estate developers. This might require you to have data for different groups even within one firm. Available economic data are never broken down this finely. Second, you would need to know the linkages; i.e., how much each of the detailed activity groups sells to all other groups. This sort of information has been provided by input-output studies in the past, but almost never at a subnational level and never at this level of detail. Given these barriers, analysts doing cluster studies have had to take some short cuts. The most ambitious projects have examined national input-output tables and made plausible inferences about relationships between groups defined at a more detailed level than displayed in those tables. Some have also conducted local interviews or undertaken other special surveys to learn more about linkages between key groups.

In this study (like most work of this kind) we have used simpler methods for allocating industries to clusters; industries being defined at the 3-digit level of the Standard Industrial Classification (SIC) system. First, for all but one of the clusters reviewed here we relied on cross-walks already developed for the HUD sponsored study noted earlier and others -- studies which did originally involve analysis of national input-output data (see adaptations discussed in Turner, Rubin and Kingsley, 1998). These clusters are: Business Services, Finance/Insurance, Media/Printing, Universities/Research, Information Technology, Biomedical Products, and Health Services, and Tourism/Recreation. For the remaining cluster, Transportation/Logistics, the

authors made the allocation judgementally based on our knowledge of the way the cluster operates. (The resulting allocations are found in Tables A1 through A9 which follow).

In the original county level data set used for this work, an employment class or range is given for some industries instead of an exact number because of the disclosure limitation practices of County Business Patterns. Where this was the case, we have used the mid-point of the range in all aggregations and subsequent calculations.

For a discussion of the advantages of the County Business Patterns data set in relation to other sources of local economic data, see Cortright and Reamer, 1998.

### **BLS (Bureau of Labor Statistics) Industry/Occupation Projections**

The BLS recurrently makes projections of employment by detailed industry and occupation categories, most recently for the 1998-2008 period. The results are found in the National Industry-Occupation Matrix which is made available publicly on the BLS web site. The most recent version contains data for over 240 industry groups and more than 500 occupation categories. Furthermore, the detailed occupation groups are also categorized by the level of training they require (based on analysis of usual and education and training requirements conducted while developing information for their *Occupational Outlook Handbook*). The Matrix and information about it can be found at <http://stats.bls.gov/asp/oep/nioem/empioan.asp>.



**Table A1**  
**Business Services**

|   | Employ.<br>(000) 97 | Location<br>Quot 97 | Gr. Rate<br>93-97 |   | Employ.<br>(000) 97 | Location<br>Quot 97 | Gr Rate<br>93-97 |
|---|---------------------|---------------------|-------------------|---|---------------------|---------------------|------------------|
| <b>Metro Camden Total</b>                   | <b>33,488</b>       | <b>1.12</b>         | <b>33%</b>        | <b>Coastal Total</b>                        | <b>11,539</b>       | <b>0.50</b>         | <b>8%</b>        |
| 7320 Credit reporting and collection        | 1,839               | 4.23                | 54%               | 8100 Legal services                         | 3,100               | 1.09                | 0%               |
| 7350 Misc. equipment rental and leasing     | 1,650               | 1.90                | -8%               | 7320 Credit reporting and collection        | 311                 | 0.92                | -5%              |
| 7330 Mailing, reproduction, stenographic    | 1,876               | 1.61                | 23%               | 8710 Engineering and architectural services | 2,023               | 0.75                | 41%              |
| 8100 Legal services                         | 5,624               | 1.54                | 16%               | 7330 Mailing, reproduction, stenographic    | 642                 | 0.71                | 10%              |
| 8710 Engineering and architectural services | 5,140               | 1.48                | 22%               | 8720 Accounting, auditing, and bookkeep     | 1,338               | 0.70                | 30%              |
| 8740 Management and public relations        | 5,136               | 1.22                | 61%               | 8610 Business associations                  | 200                 | 0.67                | 32%              |
| 7310 Advertising                            | 867                 | 0.95                | -25%              | 8740 Management and public relations        | 1,787               | 0.54                | 6%               |
| 7360 Personnel supply services              | 9,496               | 0.79                | 82%               | 7350 Misc. equipment rental and leasing     | 356                 | 0.53                | -28%             |
| 8620 Professional organizations             | 196                 | 0.66                | 130%              | 7310 Advertising                            | 294                 | 0.41                | 96%              |
| 8720 Accounting, auditing, and bookkeep     | 1,487               | 0.61                | -12%              | 8620 Professional organizations             | 84                  | 0.36                | -7%              |
| 8610 Business associations                  | 153                 | 0.40                | -33%              | 7360 Personnel supply services              | 1,404               | 0.15                | -13%             |
| <b>Philadelphia Total</b>                   | <b>61,847</b>       | <b>1.42</b>         | <b>10%</b>        | <b>Suburbs Total</b>                        | <b>79,969</b>       | <b>0.88</b>         | <b>24%</b>       |
| 8710 Engineering and architectural services | 18,510              | 3.65                | 154%              | 7320 Credit reporting and collection        | 2,102               | 1.77                | 21%              |
| 8100 Legal services                         | 16,604              | 3.11                | -5%               | 7330 Mailing, reproduction, stenographic    | 4,961               | 1.56                | 50%              |
| 8620 Professional organizations             | 700                 | 1.60                | -30%              | 8740 Management and public relations        | 16,916              | 1.47                | 30%              |
| 8720 Accounting, auditing, and bookkeeping  | 4,885               | 1.37                | 13%               | 8620 Professional organizations             | 1,037               | 1.27                | 182%             |
| 8740 Management and public relations        | 7,312               | 1.18                | -47%              | 8710 Engineering and architectural services | 11,197              | 1.18                | -6%              |
| 7330 Mailing, reproduction, stenographic    | 1,996               | 1.17                | 17%               | 7350 Misc. equipment rental and leasing     | 2,445               | 1.04                | 16%              |
| 7310 Advertising                            | 1,521               | 1.12                | -8%               | 8720 Accounting, auditing, and bookkeeping  | 6,083               | 0.91                | 22%              |
| 8610 Business associations                  | 489                 | 0.88                | -7%               | 7310 Advertising                            | 2,200               | 0.87                | 14%              |
| 7320 Credit reporting and collection        | 465                 | 0.73                | -24%              | 7360 Personnel supply services              | 25,355              | 0.78                | 41%              |
| 7350 Misc. equipment rental and leasing     | 636                 | 0.66                | 15%               | 8100 Legal services                         | 7,308               | 0.73                | 9%               |
| 7360 Personnel supply services              | 8,527               | 0.49                | 18%               | 8610 Business associations                  | 365                 | 0.35                | -7%              |

**Table A2**  
**Finance/Insurance**

|   | Employ<br>(000) 97 | Location<br>Quot 97 | Gr.Rate<br>93-97 |   | Employ<br>(000) 97 | Location<br>Quot 97 | Gr Rate<br>93-97 |
|---|--------------------|---------------------|------------------|---|--------------------|---------------------|------------------|
| <b>Metro Camden Total</b>                 | <b>17,135</b>      | <b>0.93</b>         | <b>-3%</b>       | <b>Coastal Total</b>                      | <b>7,133</b>       | <b>0.60</b>         | <b>-30%</b>      |
| 6010 Central reserve depository           | 375                | 4.11                | 0%               | 6020 Commercial banks                     | 3,633              | 0.82                | -2%              |
| 6160 Mortgage bankers and brokers         | 3,515              | 3.61                | 27%              | 6310 Life insurance                       | 1,100              | 0.73                | -74%             |
| 6150 Business credit institutions         | 1,207              | 3.07                | 73%              | 6360 Title insurance                      | 80                 | 0.67                | 300%             |
| 6350 Surety insurance                     | 75                 | 1.76                | 275%             | 6160 Mortgage bankers and brokers         | 380                | 0.50                | 3%               |
| 6330 Fire, marine, and casualty insurance | 2,890              | 1.23                | 59%              | 6090 Functions closely related to banking | 92                 | 0.46                | 11%              |
| 6370 Pension, health, and welfare funds   | 139                | 1.09                | -78%             | 6210 Security brokers and dealers         | 624                | 0.45                | 67%              |
| 6020 Commercial banks                     | 4,416              | 0.78                | -31%             | 6060 Credit unions                        | 209                | 0.42                | 8%               |
| 6710 Holding offices                      | 402                | 0.71                | 47%              | 6140 Personal credit institutions         | 200                | 0.37                | -3%              |
| 6320 Medical service and health insurance | 857                | 0.68                | 2%               | 6710 Holding offices                      | 100                | 0.23                | 16%              |
| 6790 Miscellaneous investing              | 130                | 0.57                | 46%              | 6730 Trusts                               | 30                 | 0.23                | -47%             |
| 6090 Functions closely related to banking | 145                | 0.56                | 9%               | 6280 Security and commodity services      | 119                | 0.22                | 25%              |
| 6210 Security brokers and dealers         | 976                | 0.56                | 96%              | 6370 Pension, health, and welfare funds   | 20                 | 0.20                | -75%             |
| 6280 Security and commodity services      | 360                | 0.52                | 169%             | 6330 Fire, marine, and casualty insurance | 369                | 0.20                | -8%              |
| 6140 Personal credit institutions         | 339                | 0.49                | -14%             | 6110 Federal and Fed.-sponsored credit    | 10                 | 0.17                | 0%               |
| 6310 Life insurance                       | 921                | 0.48                | -56%             | 6790 Miscellaneous investing              | 27                 | 0.15                | -66%             |
| 6730 Trusts                               | 80                 | 0.47                | -53%             | 6320 Medical service and health insurance | 130                | 0.13                | 8%               |
| 6360 Title insurance                      | 70                 | 0.46                | -24%             | 6150 Business credit institutions         | 10                 | 0.03                | -88%             |
| 6220 Commodity contracts brokers/dealers  | 20                 | 0.33                | 100%             |   |                    |                     |                  |
| 6060 Credit unions                        | 196                | 0.31                | 12%              |   |                    |                     |                  |
| 6720 Investment offices                   | 10                 | 0.20                | 0%               |   |                    |                     |                  |
| 6110 Federal and Fed.-sponsored credit    | 10                 | 0.13                | 0%               |   |                    |                     |                  |
|   |                    |                     |                  |   |                    |                     |                  |
| <b>Philadelphia Total</b>                 | <b>50,610</b>      | <b>1.89</b>         | <b>-9%</b>       | <b>Suburbs Total</b>                      | <b>61,114</b>      | <b>1.22</b>         | <b>9%</b>        |
| 6010 Central reserve depository           | 1,750              | 13.13               | 0%               | 6720 Investment offices                   | 3,760              | 27.66               | 9541%            |
| 6230 Security and commodity exchanges     | 375                | 10.23               | 0%               | 6310 Life insurance                       | 13,149             | 2.50                | -19%             |
| 6310 Life insurance                       | 10,825             | 3.84                | -34%             | 6330 Fire, marine, and casualty insurance | 12,754             | 1.99                | 64%              |
| 6320 Medical service and health insurance | 5,329              | 2.91                | 35%              | 6160 Mortgage bankers and brokers         | 4,478              | 1.69                | 16%              |
| 6350 Surety insurance                     | 175                | 2.85                | -53%             | 6790 Miscellaneous investing              | 1,011              | 1.62                | 87%              |
| 6370 Pension, health, and welfare funds   | 419                | 2.26                | -45%             | 6710 Holding offices                      | 2,356              | 1.53                | 26%              |
| 6330 Fire, marine, and casualty insurance | 6,859              | 2.00                | 11%              | 6350 Surety insurance                     | 171                | 1.49                | 90%              |
| 6090 Functions closely related to banking | 750                | 2.00                | -14%             | 6370 Pension, health, and welfare funds   | 490                | 1.42                | -37%             |
| 6020 Commercial banks                     | 15,143             | 1.82                | -7%              | 6280 Security and commodity services      | 2,273              | 1.20                | -49%             |
| 6280 Security and commodity services      | 1,750              | 1.73                | 30%              | 6150 Business credit institutions         | 1,214              | 1.13                | 17%              |
| 6360 Title insurance                      | 375                | 1.67                | 0%               | 6360 Title insurance                      | 402                | 0.96                | 57%              |
| 6210 Security brokers and dealers         | 3,851              | 1.50                | 20%              | 6210 Security brokers and dealers         | 4,245              | 0.89                | 134%             |
| 6730 Trusts                               | 334                | 1.35                | -54%             | 6140 Personal credit institutions         | 1,648              | 0.88                | 33%              |
| 6060 Credit unions                        | 936                | 1.00                | 25%              | 6090 Functions closely related to banking | 542                | 0.77                | 143%             |
| 6710 Holding offices                      | 820                | 0.99                | 99%              | 6320 Medical service and health insurance | 2,605              | 0.76                | -16%             |
| 6720 Investment offices                   | 60                 | 0.82                | 50%              | 6060 Credit unions                        | 1,118              | 0.64                | 19%              |
| 6790 Miscellaneous investing              | 175                | 0.52                | 1%               | 6020 Commercial banks                     | 8,652              | 0.56                | -24%             |
| 6390 Insurance carriers, n.e.c.           | 10                 | 0.52                |                  | 6730 Trusts                               | 190                | 0.41                | -68%             |
| 6150 Business credit institutions         | 175                | 0.30                | -68%             | 6230 Security and commodity exchanges     | 10                 | 0.15                | -50%             |
| 6140 Personal credit institutions         | 224                | 0.22                | -37%             | 6220 Commodity contracts brokers/dealers  | 16                 | 0.10                | -77%             |
| 6160 Mortgage bankers and brokers         | 245                | 0.17                | 40%              | 6110 Federal and Fed.-sponsored credit    | 20                 | 0.09                | -33%             |
| 6220 Commodity contracts brokers/dealers  | 10                 | 0.11                | -83%             | 6080 Foreign bank and branches/agencies   | 10                 | 0.03                | 0%               |
| 6110 Federal and Fed.-sponsored credit    | 10                 | 0.09                | -94%             |   |                    |                     |                  |
| 6080 Foreign bank and branches/agencies   | 10                 | 0.05                | 0%               |   |                    |                     |                  |

Table A3  
Media/Printing

|   | Employ<br>(000) 97 | Location<br>Quot 97 | Gr. Rate<br>93-97 |   | Employ<br>(000) 97 | Location<br>Quot 97 | Gr. Rate<br>93-97 |
|---|--------------------|---------------------|-------------------|---|--------------------|---------------------|-------------------|
| <b>Metro Camden Total</b>                     | <b>15,996</b>      | <b>1.13</b>         | <b>-16%</b>       | <b>Coastal Total</b>                          | <b>6,460</b>       | <b>0.59</b>         | <b>9%</b>         |
| 2760 Manifold business forms                  | 586                | 3.55                | -20%              | 4840 Cable and other pay TV services          | 769                | 1.51                | 37%               |
| 2790 Printing trade services                  | 526                | 2.73                | -28%              | 2710 Newspapers                               | 1,230              | 1.07                | 5%                |
| 2770 Greeting cards                           | 175                | 2.17                | 0%                | 2740 Miscellaneous publishing                 | 175                | 0.89                | 150%              |
| 2750 Commercial printing                      | 4,745              | 2.11                | 15%               | 4830 Radio and television broadcasting        | 565                | 0.79                | -6%               |
| 2780 Blankbooks and bookbinding               | 439                | 1.80                | 11%               | 7380 Miscellaneous business services          | 2,765              | 0.61                | 11%               |
| 2720 Periodicals                              | 637                | 1.42                | 30%               | 2720 Periodicals                              | 188                | 0.54                | 15%               |
| 4840 Cable and other pay TV services          | 749                | 1.15                | 23%               | 2780 Blankbooks and bookbinding               | 80                 | 0.42                | -38%              |
| 2710 Newspapers                               | 1,466              | 0.99                | 10%               | 2750 Commercial printing                      | 559                | 0.32                | -5%               |
| 7380 Miscellaneous business services          | 5,643              | 0.97                | -40%              | 2730 Books                                    | 70                 | 0.17                | -13%              |
| 2740 Miscellaneous publishing                 | 207                | 0.82                | 32%               | 2790 Printing trade services                  | 20                 | 0.13                | 0%                |
| 7810 Motion picture production and services   | 530                | 0.59                | -1%               | 7820 Motion picture distribution and services | 10                 | 0.08                | 0%                |
| 7820 Motion picture distribution and services | 70                 | 0.41                | 600%              | 7810 Motion picture production and services   | 29                 | 0.04                | -3%               |
| 2730 Books                                    | 120                | 0.23                | -6%               |   |                    |                     |                   |
| 4830 Radio and television broadcasting        | 99                 | 0.11                | -24%              |   |                    |                     |                   |
|   |                    |                     |                   |   |                    |                     |                   |
| <b>Philadelphia Total</b>                     | <b>25,272</b>      | <b>1.23</b>         | <b>8%</b>         | <b>Suburbs</b>                                | <b>45,859</b>      | <b>1.19</b>         | <b>24%</b>        |
| 2740 Miscellaneous publishing                 | 1,251              | 3.38                | 73%               | 2710 Periodicals                              | 4,213              | 3.44                | 16%               |
| 2730 Books                                    | 2,436              | 3.14                | 13%               | 2720 Printing trade services                  | 1,508              | 2.87                | -10%              |
| 2710 Newspapers                               | 4,097              | 1.90                | -8%               | 2730 Manifold business forms                  | 1,275              | 2.83                | -4%               |
| 2770 Greeting cards                           | 175                | 1.49                | 0%                | 2740 Blankbooks and bookbinding               | 1,047              | 1.57                | 26%               |
| 4830 Radio and television broadcasting        | 1,737              | 1.25                | -5%               | 2750 Miscellaneous business services          | 21,797             | 1.37                | 41%               |
| 7380 Miscellaneous business services          | 9,052              | 1.07                | 41%               | 2760 Commercial printing                      | 8,169              | 1.33                | -1%               |
| 7810 Motion picture production and services   | 1,386              | 1.05                | 23%               | 2770 Newspapers                               | 3,461              | 0.86                | 4%                |
| 4840 Cable and other pay TV services          | 974                | 1.02                | 30%               | 2780 Miscellaneous publishing                 | 507                | 0.73                | -38%              |
| 2790 Printing trade services                  | 274                | 0.97                | -43%              | 2790 Cable and other pay TV services          | 1,287              | 0.72                | 58%               |
| 2720 Periodicals                              | 635                | 0.97                | -30%              | 4830 Motion picture distribution and services | 328                | 0.71                | 64%               |
| 2750 Commercial printing                      | 2,937              | 0.89                | -26%              | 4840 Radio and television broadcasting        | 1,258              | 0.50                | 65%               |
| 2780 Blankbooks and bookbinding               | 246                | 0.69                | -36%              | 7380 Books                                    | 474                | 0.33                | 84%               |
| 2760 Manifold business forms                  | 60                 | 0.25                | -41%              | 7810 Greeting cards                           | 60                 | 0.27                | 0%                |
| 7820 Motion picture distribution and services | 10                 | 0.04                | 0%                | 7820 Motion picture production and services   | 475                | 0.19                | 27%               |

Table A4  
Universities/Research

|                                      | Employ<br>(000) 97 | Location<br>Quot 97 | Gr. Rate<br>93-97 |                                      | Employ<br>(000) 97 | Location<br>Quot 97 | Gr. Rate<br>93-97 |
|--------------------------------------|--------------------|---------------------|-------------------|--------------------------------------|--------------------|---------------------|-------------------|
| <b>Metro Camden Total</b>            | <b>973</b>         | <b>0.16</b>         | <b>-20%</b>       | <b>Coastal Total</b>                 | <b>1,018</b>       | <b>0.22</b>         | <b>-34%</b>       |
| 8240 Vocational schools              | 355                | 1.06                | 10%               | 8240 Vocational schools              | 320                | 1.23                | 281%              |
| 8230 Libraries                       | 80                 | 0.91                | 27%               | 8732 Commercial nonphysical research | 245                | 0.69                | 20%               |
| 8733 Noncommercial research org's    | 205                | 0.66                | -16%              | 8230 Libraries                       | 38                 | 0.56                | -58%              |
| 8732 Commercial nonphysical research | 150                | 0.33                | -65%              | 8220 Colleges and universities       | 395                | 0.10                | -65%              |
| 8220 Colleges and universities       | 183                | 0.04                | 19%               | 8733 Noncommercial research org's    | 20                 | 0.08                | 0%                |
|                                      |                    |                     |                   |                                      |                    |                     |                   |
| <b>Philadelphia Total</b>            | <b>40,650</b>      | <b>4.69</b>         | <b>-17%</b>       | <b>Suburbs Total</b>                 | <b>23,252</b>      | <b>1.41</b>         | <b>19%</b>        |
| 8220 Colleges and universities       | 37,199             | 5.23                | -17%              | 8240 Vocational schools              | 4,041              | 4.43                | 620%              |
| 8733 Noncommercial research org's    | 1,750              | 3.84                | -11%              | 8732 Commercial nonphysical research | 4,213              | 3.42                | -4%               |
| 8230 Libraries                       | 342                | 2.68                | 51%               | 8230 Libraries                       | 460                | 1.93                | 10%               |
| 8240 Vocational schools              | 703                | 1.44                | -35%              | 8220 Colleges and universities       | 14,338             | 1.08                | 4%                |
| 8732 Commercial nonphysical research | 556                | 0.84                | -5%               | 8733 Noncommercial research org's    | 200                | 0.24                | -43%              |

**Table A5**  
**Information Technology**

|  | Employ.<br>(000) 97 | Location<br>Quot. 97 | Gr. Rate<br>93-97 |  | Employ.<br>(000) 97 | Location<br>Quot. 97 | Gr. Rate<br>93-97 |
|--|---------------------|----------------------|-------------------|--|---------------------|----------------------|-------------------|
| <b>Metro Camden Total</b>                | <b>18,584</b>       | <b>1.18</b>          | <b>-5%</b>        | <b>Coastal Total</b>                     | <b>4,404</b>        | <b>0.36</b>          | <b>0%</b>         |
| 3810 Search and navigation equipment     | 3,810               | 5.80                 | 0%                | 4810 Telephone communication             | 1,885               | 0.67                 | -11%              |
| 4820 Telegraph and other communications  | 60                  | 5.59                 | 500%              | 4890 Communication services, n.e.c.      | 50                  | 0.51                 | 150%              |
| 3660 Communications equipment            | 2,252               | 2.29                 | -9%               | 7370 Computer and data processing svcs   | 1,558               | 0.36                 | 9%                |
| 7370 Computer and data processing svcs   | 6,709               | 1.23                 | -8%               | 3670 Electronic components/accessories   | 513                 | 0.30                 | -8%               |
| 4890 Communication services, n.e.c.      | 149                 | 1.20                 | 521%              | 3820 Measuring and controlling devices   | 228                 | 0.29                 | 63%               |
| 3570 Computer and office equipment       | 991                 | 1.04                 | -4%               | 3690 Misc. electrical equipment/supplies | 60                  | 0.14                 | 0%                |
| 4810 Telephone communication             | 2,951               | 0.82                 | -7%               | 3860 Photographic equipment and supplies | 20                  | 0.11                 | 0%                |
| 3860 Photographic equipment and supplies | 120                 | 0.50                 | 71%               | 3660 Communications equipment            | 70                  | 0.09                 | 600%              |
| 3670 Electronic components/accessories   | 1,051               | 0.48                 | 18%               | 3810 Search and navigation equipment     | 20                  | 0.04                 | -71%              |
| 3690 Misc. electrical equipment/supplies | 180                 | 0.33                 | 0%                |  |                     |                      |                   |
| 3820 Measuring and controlling devices   | 311                 | 0.31                 | -43%              |  |                     |                      |                   |
| <b>Philadelphia Total</b>                | <b>10,181</b>       | <b>0.44</b>          | <b>-12%</b>       | <b>Suburbs Total</b>                     | <b>59,841</b>       | <b>1.39</b>          | <b>17%</b>        |
| 4810 Telephone communication             | 6,193               | 1.18                 | -17%              | 3570 Measuring and controlling devices   | 6,391               | 2.34                 | -7%               |
| 3820 Measuring and controlling devices   | 966                 | 0.66                 | -9%               | 3660 Computer and data processing svcs   | 33,069              | 2.21                 | 39%               |
| 4820 Telegraph and other communications  | 10                  | 0.64                 | 0%                | 3670 Misc. electrical equipment/supplies | 2,489               | 1.66                 | -40%              |
| 3690 Misc. electrical equipment/supplies | 352                 | 0.44                 | -12%              | 3690 Computer and office equipment       | 2,474               | 0.95                 | 44%               |
| 4890 Communication services, n.e.c.      | 60                  | 0.33                 | 500%              | 3810 Telephone communication             | 7,830               | 0.80                 | 14%               |
| 7370 Computer and data processing svcs   | 2,270               | 0.28                 | 14%               | 3820 Communications equipment            | 2,039               | 0.76                 | -13%              |
| 3670 Electronic components/accessories   | 223                 | 0.07                 | -49%              | 3860 Telegraph and other communications  | 20                  | 0.68                 | -31%              |
| 3660 Communications equipment            | 87                  | 0.06                 | -50%              | 4810 Electronic components/accessories   | 3,928               | 0.66                 | 0%                |
| 3860 Photographic equipment and supplies | 10                  | 0.03                 | -60%              | 4820 Photographic equipment and supplies | 420                 | 0.64                 | 38%               |
| 3570 Computer and office equipment       | 10                  | 0.01                 | 43%               | 4890 Communication services, n.e.c.      | 213                 | 0.63                 | 492%              |
|  |                     |                      |                   | 7370 Search and navigation equipment     | 968                 | 0.54                 | -17%              |

**Table A6**  
**Biomedical Products+A217**

|                                       | Employ.<br>(000) 97 | Location<br>Quot. 97 | Gr. Rate<br>93-97 |                                       | Employ.<br>(000) 97 | Location<br>Quot. 97 | Gr. Rate<br>93-97 |
|---------------------------------------|---------------------|----------------------|-------------------|---------------------------------------|---------------------|----------------------|-------------------|
| <b>Metro Camden Total</b>             | <b>3,884</b>        | <b>1.30</b>          | <b>37%</b>        | <b>Coastal Total</b>                  | <b>2,031</b>        | <b>0.87</b>          | <b>-18%</b>       |
| 3850 Ophthalmic goods                 | 491                 | 4.61                 | 101%              | 3850 Ophthalmic goods                 | 185                 | 2.22                 | 164%              |
| 2830 Pharmaceuticals                  | 1,794               | 2.24                 | 74%               | 2830 Pharmaceuticals                  | 1,170               | 1.88                 | -33%              |
| 8734 Testing laboratories             | 489                 | 1.57                 | -6%               | 8734 Testing laboratories             | 140                 | 0.58                 | -37%              |
| 3840 Medical instruments and supplies | 847                 | 0.82                 | 7%                | 3840 Medical instruments and supplies | 343                 | 0.43                 | 16%               |
| 8731 Commercial physical research     | 263                 | 0.35                 | 9%                | 8731 Commercial physical research     | 193                 | 0.33                 | 48%               |
| <b>Philadelphia Total</b>             | <b>1,674</b>        | <b>0.38</b>          | <b>36%</b>        | <b>Suburbs Total</b>                  | <b>14,287</b>       | <b>1.75</b>          | <b>6%</b>         |
| 8731 Commercial physical research     | 667                 | 0.61                 | 190%              | 2830 Pharmaceuticals                  | 7,050               | 3.24                 | 12%               |
| 2830 Pharmaceuticals                  | 530                 | 0.45                 | 2%                | 8731 Commercial physical research     | 3,263               | 1.60                 | 35%               |
| 3850 Ophthalmic goods                 | 60                  | 0.39                 | -25%              | 8734 Testing laboratories             | 1,041               | 1.23                 | -4%               |
| 3840 Medical instruments and supplies | 360                 | 0.24                 | -9%               | 3840 Medical instruments and supplies | 2,863               | 1.02                 | -21%              |
| 8734 Testing laboratories             | 57                  | 0.13                 | 470%              | 3850 Ophthalmic goods                 | 70                  | 0.24                 | -34%              |

**Table A7**  
**Health Services**

|   | Employ<br>(000) 97 | Location<br>Quot. 97 | Gr. Rate<br>93-97 |   | Employ<br>(000) 97 | Location<br>Quot. 97 | Gr Rate<br>93-97 |
|---|--------------------|----------------------|-------------------|---|--------------------|----------------------|------------------|
| <b>Metro Camden Total</b>                   | <b>47,011</b>      | <b>1.10</b>          | <b>10%</b>        | <b>Coastal Total</b>                        | <b>42,009</b>      | <b>1.26</b>          | <b>8%</b>        |
| 8030 Offices of osteopathic physicians      | 1,611              | 7.92                 | 6%                | 8030 Offices of osteopathic physicians      | 610                | 3.84                 | 20%              |
| 8080 Home health care services              | 4,969              | 1.43                 | 86%               | 8040 Offices of other health practitioners  | 1,913              | 1.61                 | 34%              |
| 8040 Offices of other health practitioners  | 1,896              | 1.24                 | 23%               | 8050 Nursing and personal care facilities   | 9,156              | 1.55                 | 25%              |
| 8020 Offices and clinics of dentists        | 3,036              | 1.23                 | 16%               | 8010 Offices and clinics of medical doctors | 5,936              | 1.25                 | 26%              |
| 8070 Medical and dental laboratornes        | 833                | 1.12                 | -12%              | 8060 Hospitals                              | 17,199             | 1.17                 | -14%             |
| 8050 Nursing and personal care facilities   | 8,053              | 1.06                 | 39%               | 8020 Offices and clinics of dentists        | 2,252              | 1.17                 | 16%              |
| 8010 Offices and clinics of medical doctors | 6,442              | 1.06                 | 2%                | 8070 Medical and dental laboratornes        | 656                | 1.13                 | 27%              |
| 8060 Hospitals                              | 18,825             | 1.00                 | -5%               | 8080 Home health care services              | 2,884              | 1.06                 | 112%             |
| 8090 Health and allied services, n.e.c      | 1,346              | 0.76                 | 5%                | 8090 Health and allied services, n.e.c      | 1,403              | 1.01                 | 54%              |
| <b>Philadelphia Total</b>                   | <b>103,427</b>     | <b>1.66</b>          | <b>8%</b>         | <b>Suburbs Total</b>                        | <b>121,701</b>     | <b>1.05</b>          | <b>13%</b>       |
| 8030 Offices of osteopathic physicians      | 1,266              | 4.26                 | -8%               | 8030 Offices of osteopathic physicians      | 1,811              | 3.26                 | -6%              |
| 8090 Health and allied services, n.e.c      | 6,416              | 2.47                 | 36%               | 8070 Medical and dental laboratornes        | 3,975              | 1.96                 | 22%              |
| 8060 Hospitals                              | 63,375             | 2.31                 | 1%                | 8040 Offices of other health practitioners  | 6,268              | 1.51                 | 28%              |
| 8040 Offices of other health practitioners  | 2,719              | 1.22                 | 87%               | 8050 Nursing and personal care facilities   | 29,554             | 1.43                 | 62%              |
| 8050 Nursing and personal care facilities   | 12,962             | 1.17                 | 28%               | 8020 Offices and clinics of dentists        | 7,740              | 1.15                 | 10%              |
| 8010 Offices and clinics of medical doctors | 8,744              | 0.98                 | -9%               | 8010 Offices and clinics of medical doctors | 18,592             | 1.12                 | 18%              |
| 8080 Home health care services              | 4,470              | 0.88                 | 82%               | 8090 Health and allied services, n.e.c      | 5,088              | 1.05                 | 1%               |
| 8020 Offices and clinics of dentists        | 2,849              | 0.79                 | 7%                | 8080 Home health care services              | 8,185              | 0.86                 | 63%              |
| 8070 Medical and dental laboratornes        | 626                | 0.58                 | -29%              | 8060 Hosprtais                              | 40,488             | 0.79                 | -13%             |

**Table A8**  
**Tourism/Recreation**

|   | Employ.<br>(000) 97 | Location<br>Quot 97 | Gr.Rate<br>93-97 |   | Employ.<br>(000) 97 | Location<br>Quot 97 | Gr Rate<br>93-97 |
|---|---------------------|---------------------|------------------|---|---------------------|---------------------|------------------|
| <b>Metro Camden Total</b>                   | <b>28,207</b>       | <b>0.91</b>         | <b>-1%</b>       | <b>Coastal Total</b>                        | <b>98,394</b>       | <b>4.07</b>         | <b>44%</b>       |
| 5640 Children's and infants' wear stores    | 338                 | 2.64                | 11%              | 7010 Hotels and motels                      | 77,240              | 16.02               | 60%              |
| 8420 Botanical and zoological gardens       | 175                 | 2.49                | -53%             | 7030 Camps and recreational vehicle parks   | 292                 | 2.92                | -3%              |
| 7930 Bowling centers                        | 541                 | 1.66                | 75%              | 5640 Children's and infants' wear stores    | 213                 | 2.13                | 79%              |
| 5630 Women's accessory/specialty stores     | 296                 | 1.51                | 11%              | 5720 Household appliance stores             | 370                 | 2.00                | -15%             |
| 7910 Dance studios, schools, and halls      | 161                 | 1.50                | 5%               | 5690 Misc. apparel and accessory stores     | 207                 | 1.85                | -11%             |
| 5620 Women's clothing stores                | 1,589               | 1.34                | -35%             | 7930 Bowling centers                        | 382                 | 1.50                | 53%              |
| 7940 Commercial sports                      | 531                 | 1.33                | -40%             | 5620 Women's clothing stores                | 1,371               | 1.49                | -11%             |
| 5660 Shoe stores                            | 913                 | 1.31                | -10%             | 7910 Dance studios, schools, and halls      | 116                 | 1.38                | 30%              |
| 7830 Motion picture theaters                | 526                 | 1.16                | 55%              | 5610 Men's and boys' clothing stores        | 327                 | 1.25                | -29%             |
| 5610 Men's and boys' clothing stores        | 384                 | 1.15                | -22%             | 5660 Shoe stores                            | 664                 | 1.22                | -9%              |
| 5310 Department stores                      | 8,885               | 1.14                | -4%              | 7990 Misc. amusement, recreation services   | 3,671               | 1.16                | 0%               |
| 5940 Miscellaneous shopping goods stores    | 3,689               | 1.14                | 14%              | 7020 Rooming and boarding houses            | 27                  | 1.16                | 17%              |
| 5720 Household appliance stores             | 254                 | 1.07                | -6%              | 5310 Department stores                      | 6,723               | 1.11                | 27%              |
| 5730 Radio, television, and computer stores | 1,288               | 1.04                | 18%              | 7830 Motion picture theaters                | 390                 | 1.10                | 7%               |
| 5690 Misc. apparel and accessory stores     | 136                 | 0.96                | -25%             | 5940 Miscellaneous shopping goods stores    | 2,581               | 1.02                | 2%               |
| 5650 Family clothing stores                 | 1,337               | 0.96                | 40%              | 5650 Family clothing stores                 | 1,081               | 0.99                | -5%              |
| 5710 Furniture and homefurnishings stores   | 1,672               | 0.94                | 4%               | 5710 Furniture and homefurnishings stores   | 1,337               | 0.96                | 3%               |
| 7030 Camps and recreational vehicle parks   | 104                 | 0.81                | 27%              | 5630 Women's accessory/specialty stores     | 137                 | 0.89                | -7%              |
| 7990 Misc. amusement, recreation services   | 3,109               | 0.77                | 13%              | 8410 Museums and art galleries              | 162                 | 0.77                | -36%             |
| 7020 Rooming and boarding houses            | 20                  | 0.67                | -23%             | 5730 Radio, television, and computer stores | 746                 | 0.77                | 29%              |
| 7920 Producers, orchestras, entertainers    | 205                 | 0.32                | 159%             | 7920 Producers, orchestras, entertainers    | 228                 | 0.46                | -39%             |
| 7010 Hotels and motels                      | 1,972               | 0.32                | -20%             | 7940 Commercial sports                      | 119                 | 0.38                | -42%             |
| 8410 Museums and art galleries              | 80                  | 0.30                | 33%              | 8420 Botanical and zoological gardens       | 10                  | 0.18                |                  |
| <b>Philadelphia Total</b>                   | <b>32,323</b>       | <b>0.71</b>         | <b>-2%</b>       | <b>Suburbs Total</b>                        | <b>68,003</b>       | <b>0.80</b>         | <b>6%</b>        |
| 8410 Museums and art galleries              | 1,750               | 4.46                | 0%               | 8420 Botanical and zoological gardens       | 455                 | 2.37                | 78%              |
| 8420 Botanical and zoological gardens       | 375                 | 3.65                | 0%               | 5640 Children's and infants' wear stores    | 674                 | 1.93                | 25%              |
| 5640 Children's and infants' wear stores    | 390                 | 2.09                | -35%             | 7940 Commercial sports                      | 1,814               | 1.66                | 119%             |
| 5610 Men's and boys' clothing stores        | 967                 | 1.98                | 0%               | 5620 Women's clothing stores                | 3,705               | 1.15                | -28%             |
| 7920 Producers, orchestras, entertainers    | 1,650               | 1.77                | 5%               | 5630 Women's accessory/specialty stores     | 607                 | 1.13                | 19%              |
| 7940 Commercial sports                      | 804                 | 1.38                | 20%              | 5940 Miscellaneous shopping goods stores    | 9,257               | 1.05                | 1%               |
| 7020 Rooming and boarding houses            | 60                  | 1.37                | -56%             | 5610 Men's and boys' clothing stores        | 917                 | 1.01                | -17%             |
| 5660 Shoe stores                            | 1,175               | 1.15                | -11%             | 5650 Family clothing stores                 | 3,708               | 0.98                | 44%              |
| 5620 Women's clothing stores                | 1,979               | 1.15                | -33%             | 7990 Misc. amusement, recreation services   | 10,686              | 0.97                | 48%              |
| 5650 Family clothing stores                 | 2,041               | 1.00                | 27%              | 5710 Furniture and homefurnishings stores   | 4,571               | 0.94                | 10%              |
| 5690 Misc. apparel and accessory stores     | 174                 | 0.83                | -34%             | 5660 Shoe stores                            | 1,734               | 0.91                | -6%              |
| 7010 Hotels and motels                      | 6,985               | 0.77                | 43%              | 5310 Department stores                      | 17,914              | 0.84                | 0%               |
| 5630 Women's accessory/specialty stores     | 205                 | 0.72                | -26%             | 5730 Radio, television, and computer stores | 2,784               | 0.82                | 22%              |
| 5940 Miscellaneous shopping goods stores    | 3,293               | 0.70                | -13%             | 5720 Household appliance stores             | 521                 | 0.81                | -63%             |
| 7830 Motion picture theaters                | 425                 | 0.64                | -14%             | 5690 Misc. apparel and accessory stores     | 310                 | 0.79                | 17%              |
| 5730 Radio, television, and computer stores | 1,026               | 0.57                | -9%              | 7910 Dance studios, schools, and halls      | 216                 | 0.74                | 13%              |
| 5710 Furniture and homefurnishings stores   | 1,352               | 0.52                | -17%             | 7020 Rooming and boarding houses            | 56                  | 0.69                | -38%             |
| 7990 Misc. amusement, recreation services   | 2,703               | 0.46                | 37%              | 7830 Motion picture theaters                | 836                 | 0.68                | -13%             |
| 5720 Household appliance stores             | 157                 | 0.45                | -56%             | 7930 Bowling centers                        | 424                 | 0.48                | -10%             |
| 5310 Department stores                      | 4,603               | 0.40                | -21%             | 7920 Producers, orchestras, entertainers    | 763                 | 0.44                | -28%             |
| 7930 Bowling centers                        | 167                 | 0.35                | -14%             | 8410 Museums and art galleries              | 301                 | 0.41                | 58%              |
| 7910 Dance studios, schools, and halls      | 32                  | 0.20                | -63%             | 7010 Hotels and motels                      | 5,639               | 0.33                | -3%              |
| 7030 Camps and recreational vehicle parks   | 10                  | 0.05                | 0%               | 7030 Camps and recreational vehicle parks   | 111                 | 0.32                | -26%             |

**Table A9**  
**Transportation/Distribution**

|   | Employ.<br>(000) 97 | Location<br>Quot. 97 | Gr. Rate<br>93-97 |   | Employ.<br>(000) 97 | Location<br>Quot. 97 | Gr. Rate<br>93-97 |
|---|---------------------|----------------------|-------------------|---|---------------------|----------------------|-------------------|
| <b>Metro Camden Total</b>                   | <b>35,606</b>       | <b>1.22</b>          | <b>11%</b>        | <b>Coastal Total</b>                        | <b>14,200</b>       | <b>0.62</b>          | <b>1%</b>         |
| 4420 Deep sea domestic transport./freight   | 185                 | 3.83                 | 0%                | 4780 Miscellaneous transportation services  | 395                 | 2.94                 | 295%              |
| 4410 Deep sea foreign transport./freight    | 175                 | 2.48                 | 1650%             | 4490 Water transportation services          | 680                 | 2.14                 | -69%              |
| 5110 Paper and paper products               | 2,204               | 1.92                 | 48%               | 4220 Public warehousing and storage         | 626                 | 1.66                 | 148%              |
| 5020 Furniture and homefurnishings          | 1,363               | 1.86                 | 16%               | 4520 Air transportation, nonscheduled       | 120                 | 1.29                 | 50%               |
| 5010 Motor vehicles, parts, and supplies    | 3,713               | 1.80                 | 10%               | 5030 Lumber and construction materials      | 871                 | 1.24                 | 36%               |
| 4220 Public warehousing and storage         | 856                 | 1.78                 | 6%                | 4410 Deep sea foreign transport./freight    | 60                  | 1.09                 | 0%                |
| 5030 Lumber and construction materials      | 1,529               | 1.70                 | 5%                | 5070 Hardware, plumbing and heating equip   | 820                 | 1.00                 | 33%               |
| 5040 Professional and commercial equipmen   | 4,419               | 1.57                 | 20%               | 5020 Furniture and homefurnishings          | 459                 | 0.80                 | 21%               |
| 4490 Water transportation services          | 634                 | 1.56                 | -50%              | 5170 Petroleum and petroleum products       | 320                 | 0.75                 | -32%              |
| 5060 Electrical goods                       | 3,057               | 1.51                 | -8%               | 4210 Trucking/courier services, except air  | 3,875               | 0.73                 | -2%               |
| 5160 Chemicals and allied products          | 904                 | 1.42                 | -1%               | 5010 Motor vehicles, parts, and supplies    | 1,170               | 0.72                 | 30%               |
| 5090 Miscellaneous durable goods            | 1,864               | 1.42                 | 47%               | 5090 Miscellaneous durable goods            | 729                 | 0.71                 | 14%               |
| 4740 Rental of railroad cars                | 10                  | 1.30                 |                   | 5110 Paper and paper products               | 606                 | 0.68                 | 26%               |
| 4610 Pipelines, except natural gas          | 70                  | 1.24                 | 0%                | 5160 Chemicals and allied products          | 249                 | 0.50                 | 2%                |
| 5120 Drugs, proprietaries, and sundnes      | 915                 | 1.23                 | -11%              | 4730 Freight transportation arrangement     | 189                 | 0.45                 | -13%              |
| 5070 Hardware, plumbing and heating equip   | 1,206               | 1.15                 | 13%               | 5080 Machinery, equipment, and supplies     | 944                 | 0.41                 | 13%               |
| 4780 Miscellaneous transportation services  | 195                 | 1.13                 | 81%               | 4480 Water transportation of passengers     | 30                  | 0.40                 | -57%              |
| 4210 Trucking/courier services, except air  | 7,070               | 1.04                 | 12%               | 5040 Professional and commercial equipmen   | 806                 | 0.37                 | 17%               |
| 4730 Freight transportation arrangement     | 525                 | 0.98                 | 96%               | 5120 Drugs, proprietaries, and sundnes      | 198                 | 0.34                 | -16%              |
| 5170 Petroleum and petroleum products       | 531                 | 0.97                 | 43%               | 5060 Electrical goods                       | 507                 | 0.32                 | 6%                |
| 5080 Machinery, equipment, and supplies     | 2,838               | 0.97                 | 13%               | 5050 Metals and minerals, except petroleum  | 150                 | 0.30                 | -25%              |
| 5050 Metals and minerals, except petroleum  | 552                 | 0.86                 | -10%              | 4420 Deep sea domestic transport./freight   | 10                  | 0.26                 |                   |
| 4440 Water transportation of freight, n e c | 20                  | 0.48                 | 100%              | 4510 Air transportation, scheduled          | 346                 | 0.18                 | 13%               |
| 4510 Air transportation, scheduled          | 610                 | 0.25                 | 11%               | 5150 Farm-product raw materials             | 40                  | 0.14                 | 0%                |
| 4480 Water transportation of passengers     | 20                  | 0.21                 | -71%              |   |                     |                      |                   |
| 5150 Farm-product raw materials             | 30                  | 0.08                 | 0%                |   |                     |                      |                   |
| 4520 Air transportation, nonscheduled       | 10                  | 0.08                 | -50%              |   |                     |                      |                   |
|   |                     |                      |                   |   |                     |                      |                   |
| <b>Philadelphia Total</b>                   | <b>37,701</b>       | <b>0.88</b>          | <b>0%</b>         | <b>Suburbs Total</b>                        | <b>73,648</b>       | <b>0.92</b>          | <b>12%</b>        |
| 4420 Deep sea domestic transport./freight   | 375                 | 5.31                 | 114%              | 5120 Drugs, proprietaries, and sundnes      | 5,370               | 2.65                 | 16%               |
| 4520 Water transportation services          | 1,282               | 2.16                 | 15%               | 5160 Chemicals and allied products          | 3,931               | 2.27                 | 53%               |
| 5030 Pipelines, except natural gas          | 175                 | 2.12                 | 0%                | 4210 Deep sea domestic transport./freight   | 245                 | 1.86                 | -36%              |
| 5080 Air transportation, scheduled          | 7,214               | 2.02                 | 30%               | 4220 Rental of railroad cars                | 30                  | 1.43                 | 50%               |
| 5010 Furniture and homefurnishings          | 1,378               | 1.29                 | -12%              | 5060 Electrical goods                       | 7,485               | 1.35                 | 30%               |
| 5170 Freight transportation arrangement     | 1,006               | 1.28                 | 4%                | 5050 Metals and minerals, except petroleum  | 2,299               | 1.31                 | 30%               |
| 4780 Chemicals and allied products          | 1,157               | 1.25                 | 50%               | 5040 Professional and commercial equipmen   | 9,447               | 1.23                 | 5%                |
| 4220 Paper and paper products               | 2,065               | 1.23                 | -15%              | 5070 Hardware, plumbing and heating equip   | 3,285               | 1.15                 | -12%              |
| 5060 Miscellaneous durable goods            | 1,934               | 1.01                 | -3%               | 5020 Furniture and homefurnishings          | 2,289               | 1.15                 | 8%                |
| 5040 Trucking/courier services, except air  | 10,010              | 1.01                 | 8%                | 4410 Freight transportation arrangement     | 1,622               | 1.11                 | 72%               |
| 4410 Hardware, plumbing and heating equip   | 1,271               | 0.83                 | -36%              | 5010 Motor vehicles, parts, and supplies    | 6,130               | 1.09                 | 32%               |
| 5120 Metals and minerals, except petroleum  | 767                 | 0.82                 | -16%              | 5080 Machinery, equipment, and supplies     | 8,684               | 1.09                 | 5%                |
| 4480 Water transportation of passengers     | 111                 | 0.79                 | 85%               | 5030 Lumber and construction materials      | 2,605               | 1.06                 | 14%               |
| 5050 Drugs, proprietaries, and sundnes      | 753                 | 0.69                 | 69%               | 5110 Paper and paper products               | 3,276               | 1.05                 | 19%               |
| 5070 Deep sea foreign transport./freight    | 60                  | 0.58                 | -84%              | 4420 Air transportation, nonscheduled       | 305                 | 0.94                 | 307%              |
| 4210 Professional and commercial equipmen   | 2,376               | 0.58                 | -13%              | 4440 Public warehousing and storage         | 1,153               | 0.88                 | 15%               |
| 5090 Electrical goods                       | 1,667               | 0.56                 | -19%              | 5090 Miscellaneous durable goods            | 3,096               | 0.86                 | -3%               |
| 5110 Public warehousing and storage         | 332                 | 0.47                 | -34%              | 4480 Pipelines, except natural gas          | 130                 | 0.84                 | 86%               |
| 5160 Miscellaneous transportation services  | 114                 | 0.45                 | -37%              | 4490 Water transportation of passengers     | 185                 | 0.71                 | 131%              |
| 4730 Petroleum and petroleum products       | 357                 | 0.45                 | 6%                | 5170 Petroleum and petroleum products       | 1,041               | 0.70                 | 17%               |
| 5020 Motor vehicles, parts, and supplies    | 1,225               | 0.41                 | -11%              | 4510 Miscellaneous transportation services  | 255                 | 0.54                 | 65%               |
| 4510 Machinery, equipment, and supplies     | 1,652               | 0.39                 | -17%              | 4520 Trucking/courier services, except air  | 8,767               | 0.47                 | 6%                |
| 4610 Lumber and construction materials      | 407                 | 0.31                 | -47%              | 4510 Air transportation, scheduled          | 1,649               | 0.25                 | -32%              |
| 4490 Air transportation, nonscheduled       | 13                  | 0.07                 | -48%              | 4730 Water transportation services          | 130                 | 0.12                 | -74%              |
|   |                     |                      |                   | 5150 Farm-product raw materials             | 109                 | 0.11                 | 30%               |
|   |                     |                      |                   | 4740 Deep sea foreign transport./freight    | 20                  | 0.10                 | 100%              |
|   |                     |                      |                   | 4780 Water transportation of freight, n e c | 10                  | 0.09                 | -83%              |