2018 LMA THEMES

• Workforce Powerhouse for the City and State

• Transformative Growth for the Region

• Epicenter of Innovation and Healthcare

• Students Build the State’s Economy

• Community Centered Focus

• Transportation System Remains Virtually the Same
Workforce Powerhouse for the City and State
TOTAL DAILY POPULATION: 112,000

Fills 560 two-car Green Line Trains

- Employees & Workers: 51%
- Students: 26%
- Patients & Visitors: 23%

Legend:
- Employees & Workers
- Patients & All Visitors
- All Students
48,400 payroll employees

• 700 new employees every year

• 1.5% increase since 2013

• 32% are Boston residents

8,500+ non-payroll researchers, physicians, contractors
• Total revenues of $10b were offset by expenses of $9.8b
• Net revenues were $202.7m – 92% medical
• Net patient service revenue was $5.26b
• LMA payroll of over $2.89b
  o Payroll generated ~ $184m in state tax revenues
  o Including estimated payroll generated through research funding
Transformative Growth for the Region
THE LMA IS A REGIONAL POWERHOUSE AT 24.6 MSF
LMA = 20 MILLION SQUARE FEET

- Doubled 4 times since 1900
- Doubled over the past 30 years

Transportation Infrastructure Still Substantially the Same
ON-SITE: INCREASED BY 6% SINCE 2013
NEAR-SITE: INCREASED 10% to 1.56 MSF
• 32% more people and 36% more development than Kendall Sq. (not including visitors)
• 80% more people than Seaport; same amount of development (with visitors)
THE LMA HAS GROWN SUSTAINABLY (2018)

LEED Buildings (28)

- LEED Gold (12)
- LEED Silver (4)
- LEED Certifiable* (8)
- Planned or Certification Pending (4)
- Green roof or green space over building (9)

* Built to LEED standards per City of Boston Article 80 requirements
Epicenter of Innovation and Healthcare
PATIENTS: 2.3 MILLION

2.2 million Outpatients

Nearly 92,900 Inpatient admissions

Of all Boston hospitals & clinics:
• 41% of outpatient visits to the LMA
• 43% of inpatient admissions to the LMA
• 48% of all staffed beds are in the LMA

LMA length of stay increased to 6.64
• 1.78 days higher than state avg.

LMA Avg. Occ. Rate reduced 1%
• 12% higher than state avg.

11,689 births
NIH RESEARCH FUNDING INCREASED

- MA: $2.57 Billion
  - Increased by 8%
- MA is #2 after CA
- LMA: nearly $1.1 Billion
  - Increased by 8%
- If LMA were a state it would be #7, after TX, before MD
- Over $2 billion, when including private, industry and other research funding
Students Build the State’s Economy
• 29,000 students in the LMA

• 20,000 Colleges of the Fenway  
  ○ 2,500 fully on-line students

• 7,047 dormitory beds  
  ○ Increase of 4.1% since 2013
COLLEGES OF THE FENWAY (COF) BUILD THE STATE’S ECONOMY

• Over half COF students from MA
  o 64% of Alumni stay in MA

• Over 1/3rd out-of-state

• 6% International
• Graduate students: 39%
• 4% increase in on-campus residential undergraduates
• 19% of Boston’s college & university enrollment
• Over 54% of Boston’s 4-yr small college enrollment
Community Centered Focus
- 589 Programs offered to youth and adults
- 15,300 Participants
- 35% Increase in participants in medical members workforce programs
- $2.9 Million invested annually in programs
COMMUNITY BENEFITS

PILOT contributions to the City were $22.3 million*
• Up 70% since 2013, 200% in 6 yrs.

Scholarships (all institutions): $194 million
• COF: $163 million, 31% increase

Meds contributed $177m in State community benefits
• Nearly $78m in Net Charity Care, up 5%

*Of which $9.3m was cash, and nearly $13m in community benefits credits
Transportation System Remains Virtually the Same
LMA employees come from across the state & New England

North Corridor
3,400 / 7.2%

Northwest Corridor
557 / 1.2%

Upper West – Route 2 Corridor
2,276 / 4.8%

Lower West – I-90 Corridor
1,029 / 2.2%

Metrowest – Rte 9 Corridor
1,366 / 2.9%

Southwest Corridor
3,466 / 7.3%

South Corridor
2,547 / 5.4%

Northeast Corridor
2,817 / 6.0%

Cambridge/Somerville Corridor
3,494 / 7.4%

Brookline/Newton Corridor
5,692 / 12.1%

Boston Corridor
15,038 / 31.9%

Southeast Corridor
4,002 / 8.5%
2016 LMA COMMUTING MODE SPLIT

- Drive Alone, 29%
- Public Transit, 48%
- Bicycle, 4%
- Walk, 10%
- Carpool/Vanpool, 4%
- Other, 5%

- Nearly 50% take transit
- Added 2,100 employees
INSTITUTIONS INCREASE FINANCIAL SUPPORT OF PUBLIC TRANSPORTATION

- $26.9 million in total spending on T-passes (245,900 passes)
  - $13.7 million by institutions, 24% increase
  - $13.2 million by employees, 22% increase
  - 10.4% growth in annual T-passes sold (over 2013)
- MBTA service supplemented by $10.6 million in privately funded transportation
- $8.5m funding for MASCO shuttles
DISTRIBUTION OF SUBWAY & BUS RIDERS

37% Come from South, 25% from West
DISTRIBUTION OF COMMUTER RAIL RIDERS

- Framingham/Worcester Line: 18%
- Lowell & Haverhill Lines: 13%
- Newburyport/Rockport Line: 12%
- North Station: 28%
- JFK/UMass: 13%
- Middleboro, Kingston/Plymouth & Greenbush Lines: 13%
- Yawkey: 13%
- Needham, Franklin & Providence/Stoughton Lines: 41%
- Fitchburg Line: 3%

28% come through North Station