

**2016 MERC PUBLICATION**

**MARLBOROUGH  
EMPLOYMENT REPORT**



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**Framingham**  
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MetroWest Economic  
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# Framingham State University

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# MARLBOROUGH EMPLOYMENT REPORT

## INTRODUCTION

A major player in the powerful innovation economy of the Greater MetroWest region\* (GMW), Marlborough boasts a highly skilled labor force, high wage employment, and a diversified industrial base built on manufacturing, professional, scientific and technical services, trade, health services, and financial activities.

With an estimated resident population of 39,141, the city of Marlborough offers a highly educated, skilled labor force. Over one-third of the population 25 years and older, 39% or 11,000 residents, holds a Bachelor's degree, similar to Massachusetts (40%) and exceeding the U.S. (30%) rate. Fifteen percent of this population possesses a graduate or professional degree, similar to the state (17%), but higher than the nation (12%). In 2014 the Marlborough labor force included 23,146 individuals. The 2014 Marlborough annual unemployment rate of 4.8% fell well below the rates of both Massachusetts (5.7%) and the U.S. (6.2%).

Located between Boston and Worcester and served directly by I-495, I-290 and Routes 20 and 85, Marlborough residents, businesses, and employees have additional convenient access via I-495 to the Massachusetts Turnpike (I-90) and Route 9.

In 2014 Marlborough's 1,550 establishments generated 28,640 jobs, a record total payroll of \$2.5 billion, and a record average annual wage of \$86,000. Marlborough ranked second in the region in employment, payroll, average wage, and establishments.

A highly diversified economy, five different industry supersectors, Professional and Business Services; Trade, Transportation, and Utilities; Manufacturing; Education and Health; and Leisure and Hospitality, produce almost 80% of the city's employment and three-fourths of total payroll. Marlborough establishments include: Raytheon Company, Boston Scientific, TJX, Quest Diagnostics, Ken's Foods, Acosta, Dow Chemical, Hologic, Sunovion Pharmaceuticals, UMASS Marlborough Hospital, GE Healthcare Life Sciences, Rewalk Robotics, Digital Federal Credit Union, and ADP.



This *Marlborough Employment Report*, prepared for the Marlborough Economic Development Corporation, includes the most recent annual data for the city of Marlborough on employment, payroll, wages, and establishments as well as comparisons with the region and state.

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

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

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# MARLBOROUGH EMPLOYMENT REPORT

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

The MetroWest Economic Research Center (MERC) at Framingham State University maintains an employment database for the MetroWest CCSA™, the Greater Marlborough Region, the South Shore CCSA™, the 495/MetroWest region, and other substate economies. MERC has documented remarkable growth in regional employment and wages as well as major changes in industrial structure and employment since 1980. For this 2016 publication, MERC has developed employment data for the city of Marlborough.

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

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

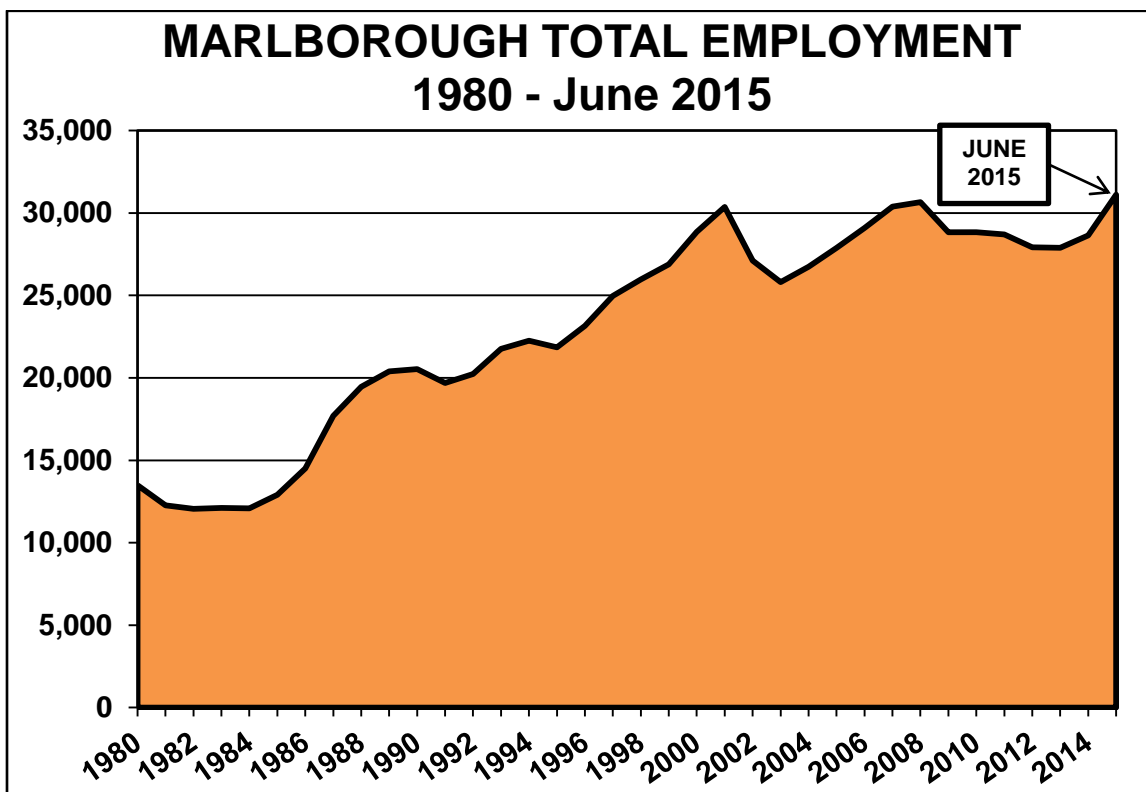
In the ES-202 series **employment** refers to the count of all persons on the payroll of establishments subject to the law, who worked full-time or part-time for establishments sited within Marlborough. Annual **payroll** includes all wages and salaries paid to covered employees including commissions,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

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

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

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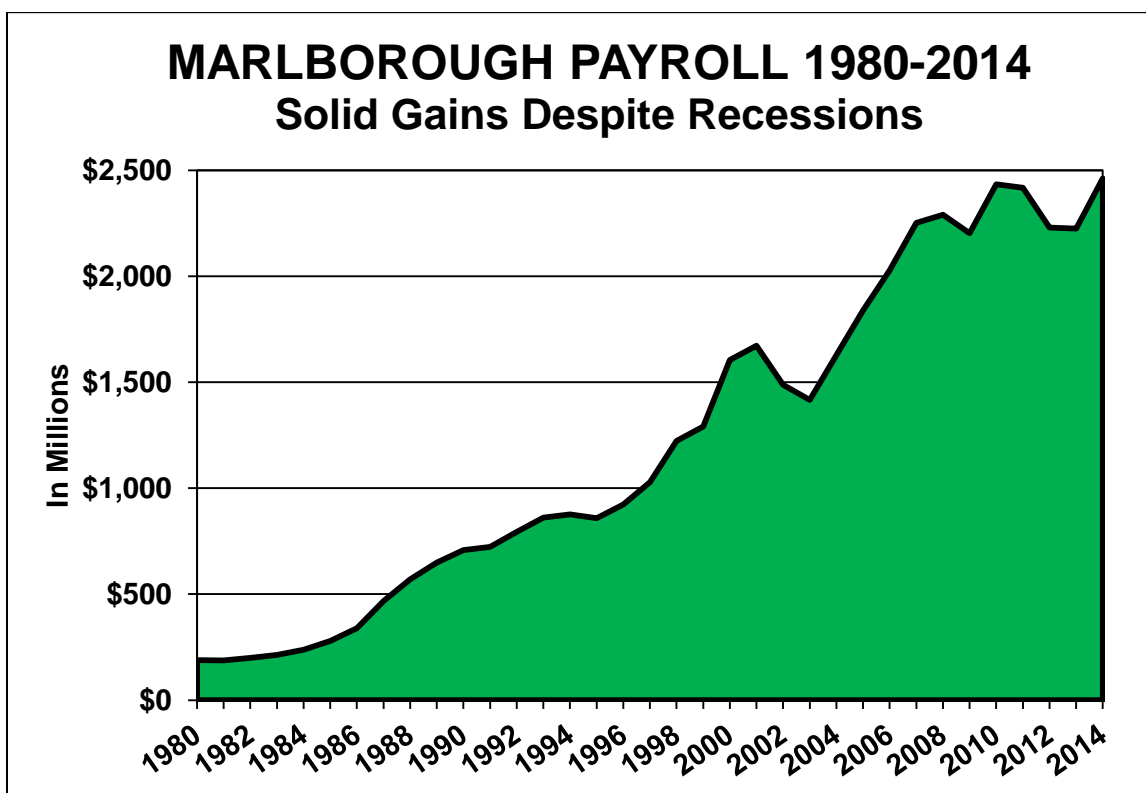


Source: MA EOLWD, MERC

- Total Marlborough employment rose from 13,490 jobs in 1980 to 28,640 jobs in 2014, a gain of 15,150 jobs, an increase of 112%.
- Total employment in 2014 was 6.6% below its most recent peak of 30,660 jobs in 2008. However, as of June 2015, employment had rebounded to 31,110 jobs surpassing that peak, an increase of 5.7% from June 2014.
- Between 1980 and 2014, employment in the city grew at an average annual rate of 2.2%, higher than the rates for Greater MetroWest (GMW) (1.5%), Massachusetts (0.8%), and the U.S. (1.3%).
- Marlborough employment grew steadily with two minor dips from its low of 12,060 jobs in 1982 to 30,370 jobs in 2001, a gain of over 150%. After 2001 two recessions impacted the city. Employment fell 15% in the 2001-03 dot-com recession before rebounding to its 2008 record high. With the Great Recession, employment fell 9% from 2008-13 before recovering.

Year	Number of Jobs	Year	Number of Jobs
1980	13,490	2001	30,370 (peak)
1985	12,910	2005	27,880
1990	20,530 (peak)	2008	30,660 (peak)
1995	21,850	2010	28,830
2000	28,860	2014	28,640

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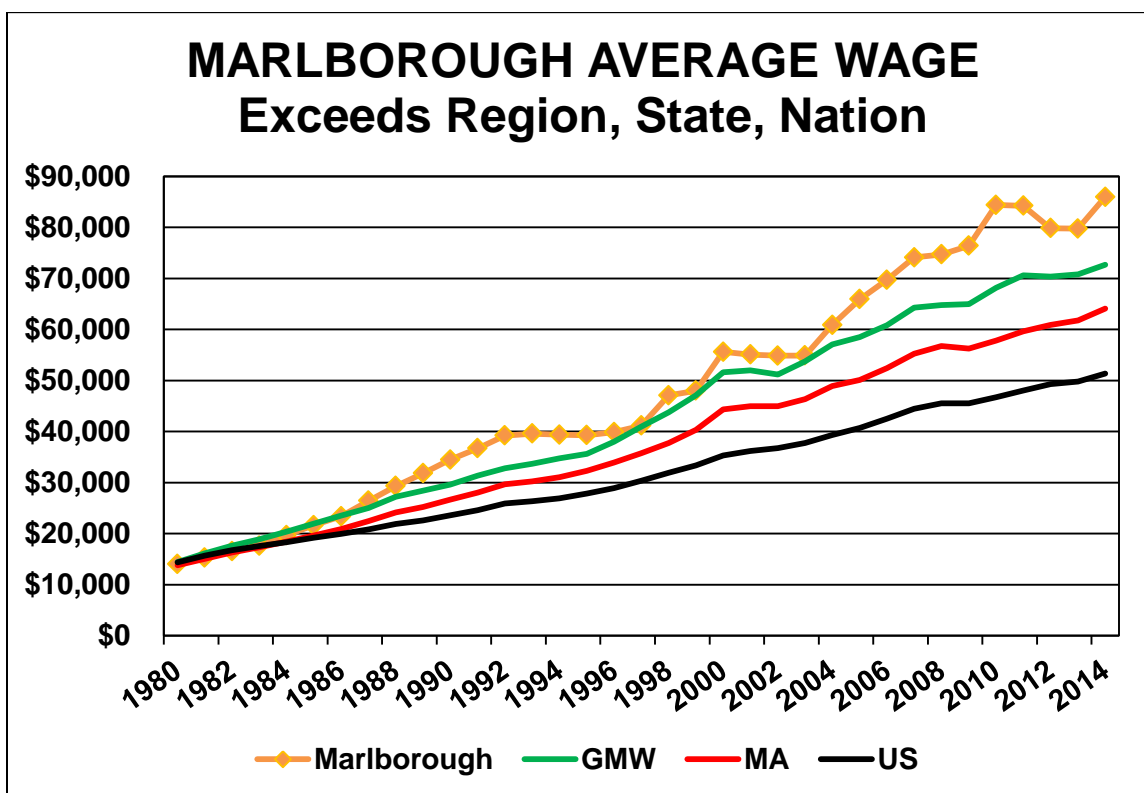
Source: MA EOWLD, MERC

- Marlborough's total nominal payroll, or payroll not corrected for inflation, climbed from \$188.8 million in 1980 to a record \$2.5 billion in 2014, a thirteen-fold increase over the 34 years. In contrast, total payroll in Greater MetroWest (GMW) increased by a factor of 8, while payrolls at the state and national levels were 6 times and 5.5 times larger, respectively.
- Total nominal payroll in Marlborough grew at an annual average rate of 7.8%, above the rates of the Greater MetroWest region (GMW) at 6.4%, Massachusetts at 5.4%, and the nation as a whole at 5.1%.
- Marlborough's total payroll rose steadily from 1980 to 2001, increasing from \$188.8 million to almost \$1.7 billion. The dot-com recession of 2001-03 caused a 15.3% payroll decline before recovery and expansion. Following the Great Recession of 2009 Marlborough payroll has hovered around \$2.4 billion.

Year	Total Payroll	Year	Total Payroll
1980	\$188.8 million	2000	\$1.6 billion
1985	\$279.2 million	2005	\$1.8 billion
1990	\$708.0 million	2010	\$2.4 billion
1995	\$858.5 million	2014	\$2.5 billion (high)



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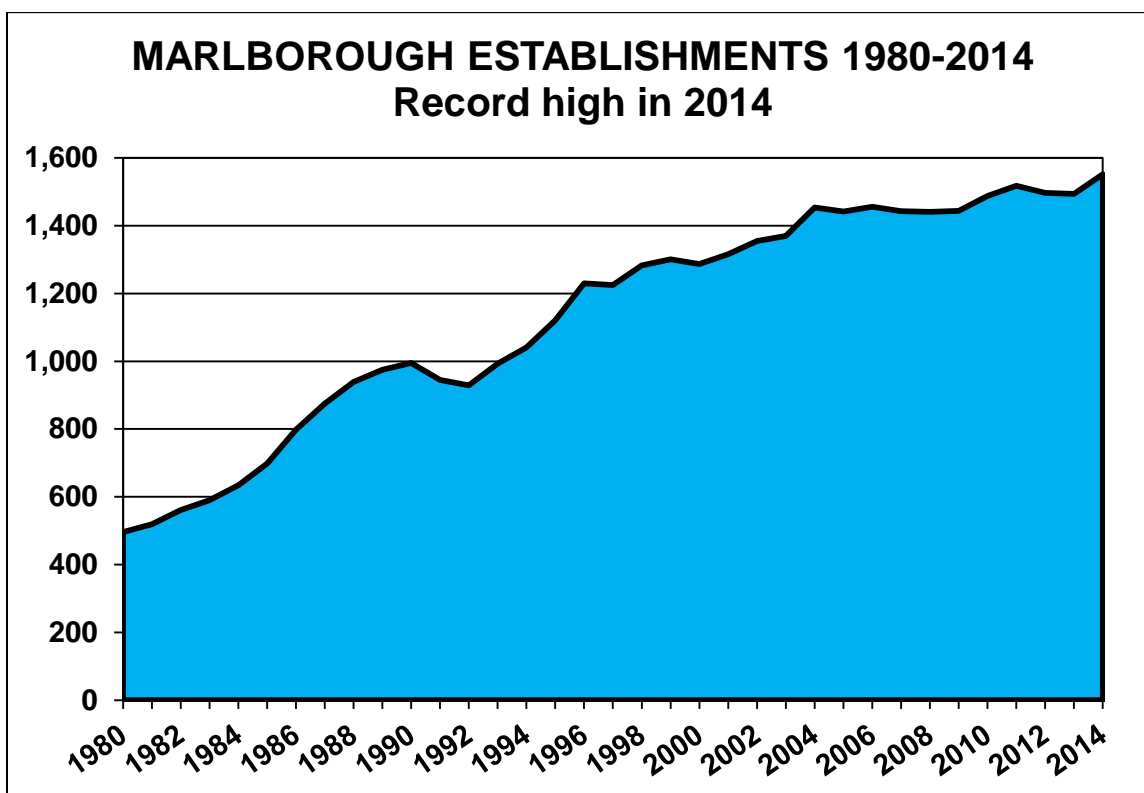


Source: MA EOLWD, MERC

- For the entire period from 1980 to 2014, the average annual wage in Marlborough exceeded those of the state and nation. Since 1987 it also exceeded the Greater MetroWest region's (GMW) average wage as well.
- The Marlborough average annual wage rose from just under \$14,000 in 1980 to a record \$86,000 in 2014, a gain of 514%. Over the 34-year period the average wage in the city rose at a 5.5% annual rate, exceeding the rates for the region (4.9%), the state (4.6%), and the nation (3.8%).
- In 2014 the Marlborough average annual wage was 18% above the GMW average wage, 34% above the MA average wage, and 67% higher than the U.S. average annual wage.

Year	Marlborough	GMW	MA	US
1980	\$14,000	\$14,400	\$13,800	\$14,400
1990	\$34,500	\$29,600	\$26,700	\$23,600
2000	\$55,600	\$51,600	\$44,300	\$35,300
2010	\$84,400	\$68,200	\$57,800	\$46,800
2014	\$86,000 (high)	\$72,700	\$64,100	\$51,400

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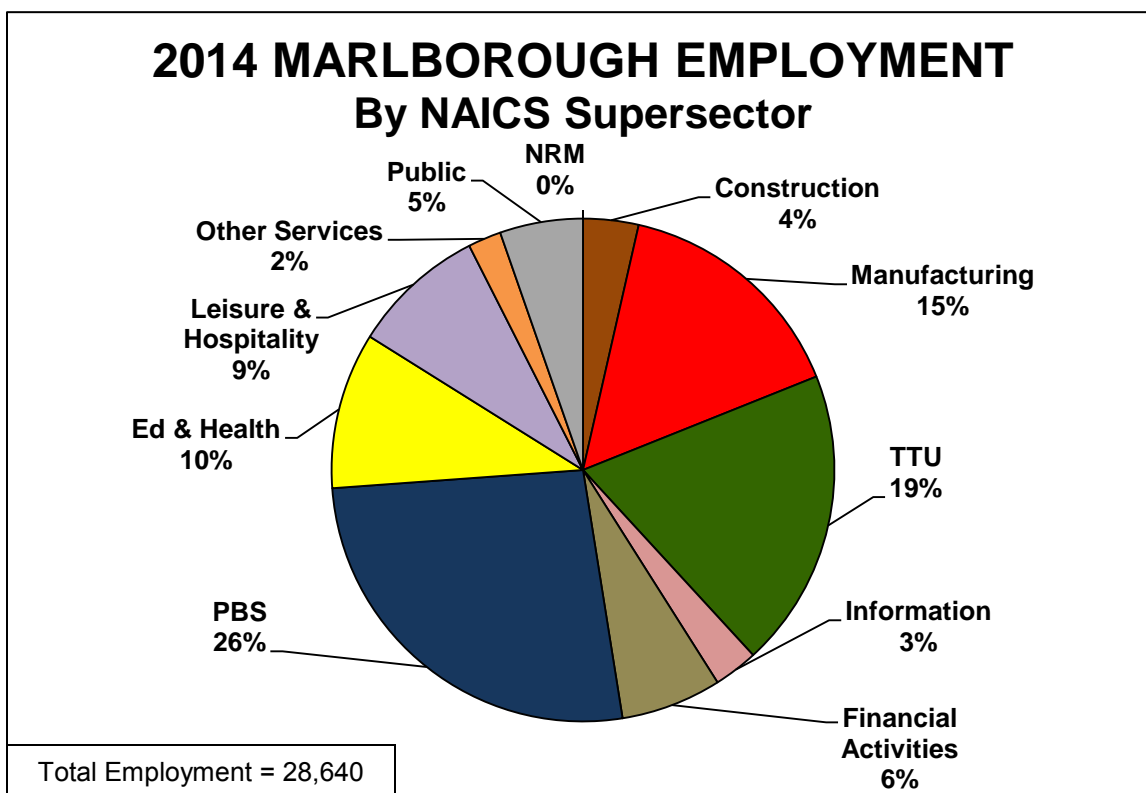


Source: MA EOLWD, MERC

- The total number of establishments or separate places of work in Marlborough rose from 500 establishments in 1980 to a record high 1,550 establishments in 2014, an average gain of 3.4% per year.
- This 3.4% average annual increase in the number of establishments in the city exceeded the corresponding rates of the Greater MetroWest region (GMW) (2.4%), the state (2.0%), and nation (2.0%).
- While the growth in the number of establishments was remarkably steady over this period, there was one significant decline. Between 1990 and 1992 the number of establishments fell from 995 to 930, a 6.6% drop.
- In 1980 Marlborough's 500 establishments represented slightly more than 10% of all the establishments located in GMW. By 2014 Marlborough's share of GMW establishments had risen to 14.4%.

Year	Number of Establishments	Year	Number of Establishments
1980	500 (low)	2000	1,290
1985	700	2005	1,440
1990	995 (peak)	2010	1,490
1995	1,120	2014	1,550 (high)

## MARLBOROUGH EMPLOYMENT REPORT



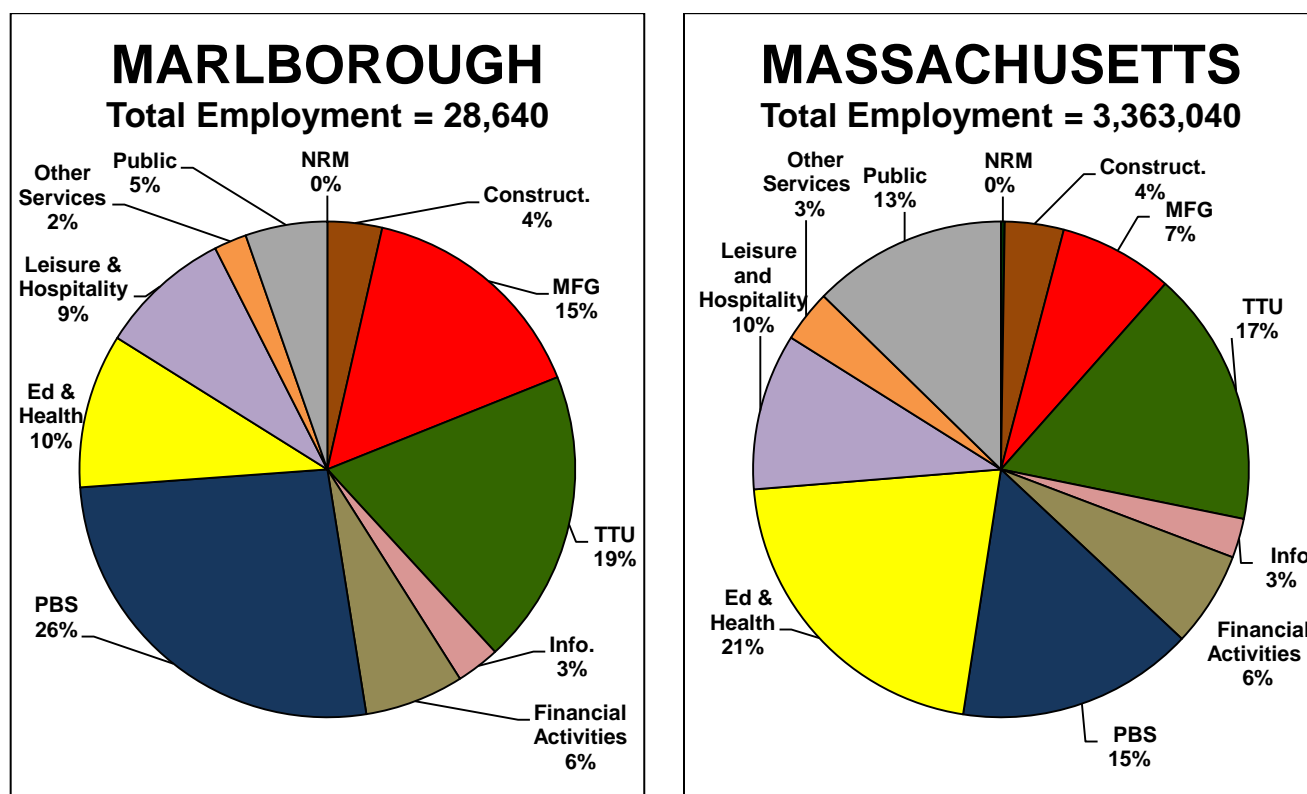
Source: MA EOLWD, MERC

- In 2014 Marlborough employment totaled 28,640 jobs, an increase of 750 jobs, or 2.7%, from 2013.
- Five NAICS supersectors formed the core of Marlborough's diverse economic base.
- Professional and Business Services (PBS) generated the largest percentage of Marlborough employment at 26% or 7,550 jobs, followed by Trade, Transportation, and Utilities (TTU) at 19% or 5,510 jobs and Manufacturing at 15% or 4,400 jobs.
- Five supersectors, PBS, TTU, Manufacturing, Education & Health, and Leisure & Hospitality, combined to produce 80% of Marlborough jobs.
- In 2014 95% of Marlborough employment occurred in the private sector.

Supersector	Employment	Supersector	Employment
PBS	7,550	Public	1,530
TTU	5,510	Construction	1,020
Manufacturing	4,400	Information	810
Education & Health	2,880	Other Services	610
Leisure & Hospitality	2,470	Natural Resources (NRM)	0
Financial Activities	1,850	<b>Total Marlborough</b>	<b>28,640</b>

## MARLBOROUGH EMPLOYMENT REPORT

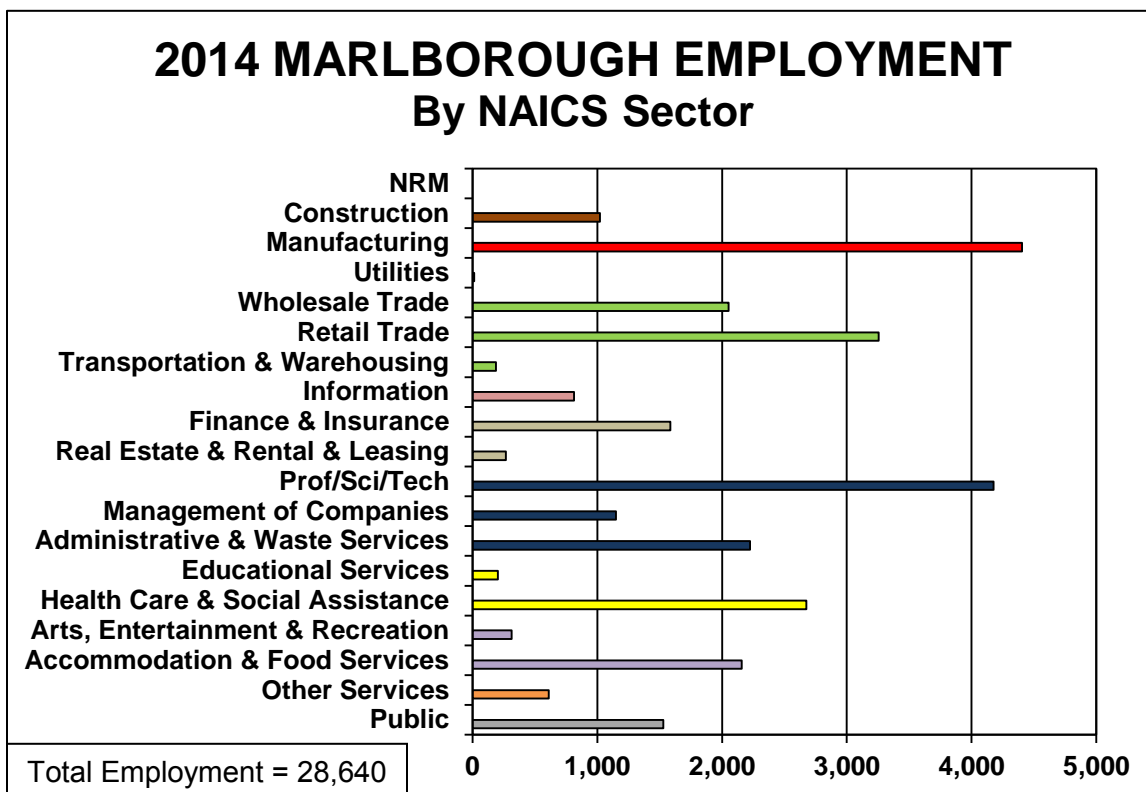
### 2014 EMPLOYMENT BY NAICS SUPERSECTORS Marlborough vs. Massachusetts



Source: MA EOLWD, MERC

- In 2014 Marlborough employment totaled 28,640 jobs, up 2.7% from 2013. In contrast, Massachusetts employment totaled 3,363,040 jobs in 2014, an increase of 2.0% from the previous year.
- Three NAICS supersectors generated 60% of total Marlborough employment: Professional and Business Services (PBS) (26%), Trade Transportation & Utilities (TTU) (19%), and Manufacturing (15%).
- In Massachusetts four NAICS supersectors dominated state employment, generating two-thirds of the state's total employment. These supersectors included Education & Health (21%), TTU (17%), PBS (15%), and Public (13%).
- Four supersectors, Manufacturing, TTU, Information, and PBS, produced higher percentage shares of community employment than state employment in 2014.
- In 2014 Massachusetts had higher percentage shares of employment compared to Marlborough in five supersectors: Construction, Education & Health, Leisure & Hospitality, Other Services, and Public.

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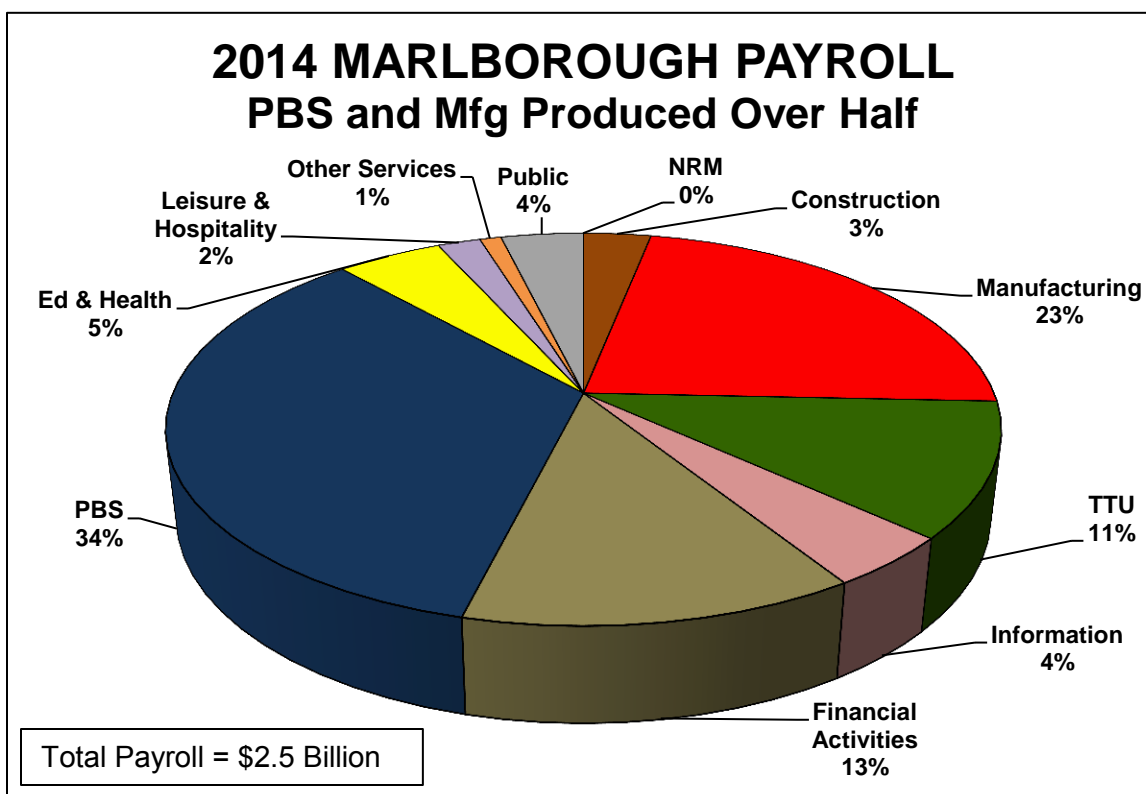
Source: MA EOLWD, MERC

- The 11 NAICS supersectors are further subdivided into 19 NAICS sectors shown here.
- In 2014 Marlborough employment totaled 28,640 jobs. Among the 19 NAICS sectors, Manufacturing led with 4,400 jobs or 15% of community employment followed by Professional, Scientific and Technical (Prof/Sci/Tech) (4,180 jobs or 15%) and Retail Trade (3,260 jobs or 11%).
- Employment in seven NAICS sectors exceeded 2,000 jobs. Combined, Manufacturing, Prof/Sci/Tech, Retail Trade, Health Care & Social Assistance, Administration & Waste Services, Accommodation & Food Service, and Wholesale Trade generated 20,950 jobs, 73% of total employment. The 12 remaining NAICS sectors each supplied fewer than 1,600 jobs.

NAICS Sector	Number of Jobs	Percentage of Total
Manufacturing	4,400	15%
Prof/Sci/Tech	4,180	15%
Retail Trade	3,260	11%
Health Care & Social Assistance	2,680	9%
Admin. & Waste Services	2,220	8%
Accommodation & Food Services	2,160	8%
Wholesale Trade	2,050	7%

Note: Complete NAICS sector data is on page 39.

## MARLBOROUGH EMPLOYMENT REPORT



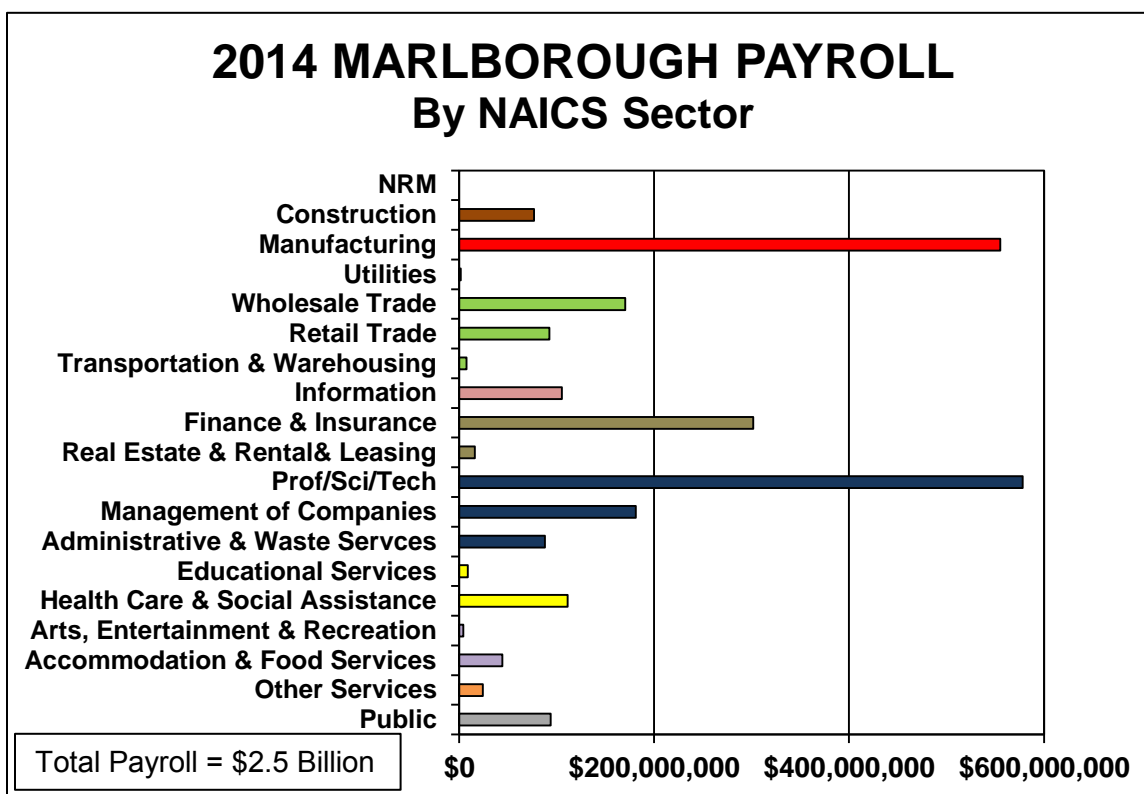
Source: MA EOLWD, MERC

- In 2014 Marlborough payroll totaled \$2.5 billion, up 10.7% from 2013.
- Among the NAICS supersectors Professional and Business Services (PBS) generated the highest payroll, \$848 million or 34%, followed by Manufacturing with \$555 million (23%). Together, these two supersectors generated over half (57%) of the total Marlborough payroll.
- Two supersectors, Financial Activities with \$318 million (13%) and Trade, Transportation and Utilities (TTU) with \$272 million (11%), combined to produced an additional 24% of total Marlborough payroll.
- The remaining six supersectors each supplied less than 5% of Marlborough's total payroll.

Supersector	Payroll (Millions)	Supersector	Payroll (Millions)
PBS	\$848	Public	\$94
Manufacturing	\$555	Construction	\$77
Financial Activities	\$318	Leisure & Hospitality	\$49
TTU	\$272	Other Services	\$24
Education & Health	\$120	Natural Resources (NRM)	\$0*
Information	\$105	<b>Total Marlborough</b>	<b>\$2,462</b>

\*Note: Natural Resources and Mining (NRM) had no employment in 2014.

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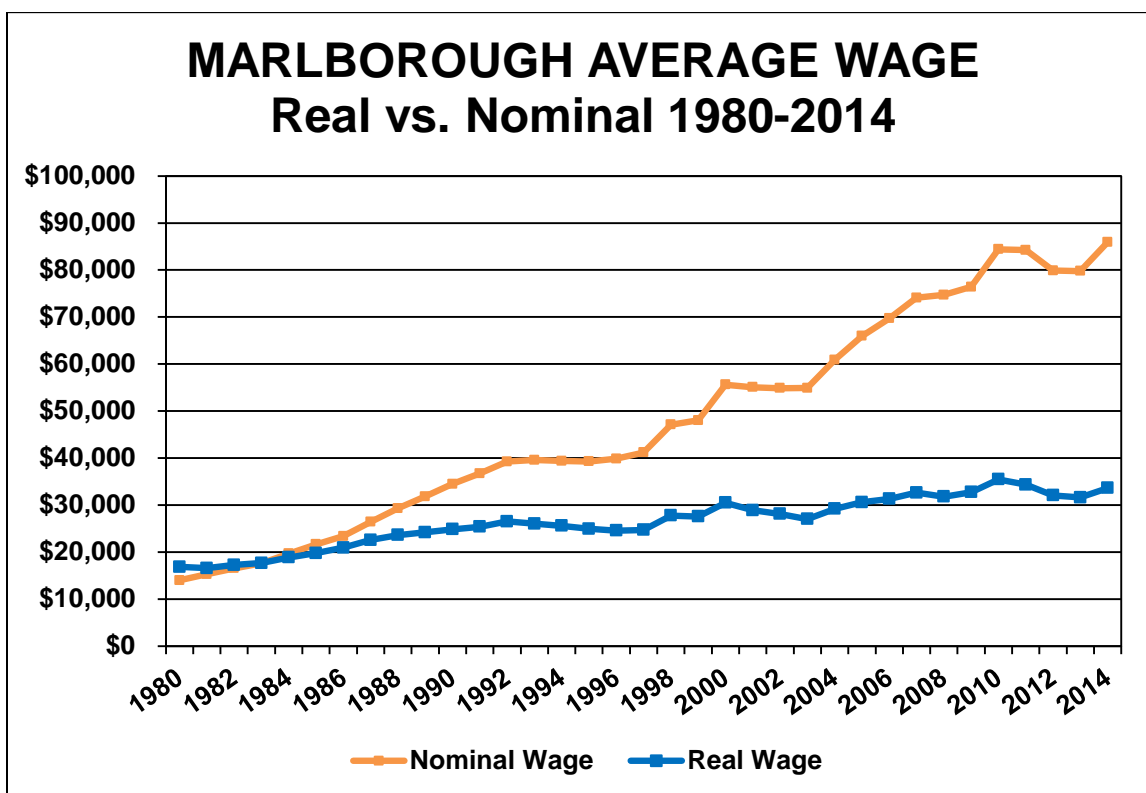
Source: MA EOLWD, MERC

- In 2014 the total payroll generated by Marlborough firms was \$2.5 billion, up 10.7% from 2013.
- Among the 19 NAICS sectors Professional, Scientific and Technical (Prof/Sci/Tech) and Manufacturing generated the largest shares of payroll at \$578 million (23%) and \$555 million (22%), respectively. Combined they produced 46% or nearly half of Marlborough payroll.
- Three sectors, Finance & Insurance (\$302 million), Management of Companies (\$181 million), and Wholesale Trade (\$170 million), followed. Combined, these three sectors produced \$653 million or 27% of Marlborough payroll.
- The remaining sectors each contributed less than \$111 million to Marlborough's payroll. Their shares of total payroll were all 4% or less.

NAICS Sector	Payroll (Millions)	Percentage of Total
Prof/Sci/Tech	\$578	23%
Manufacturing	\$555	22%
Finance & Insurance	\$302	12%
Management of Companies	\$181	7%
Wholesale Trade	\$170	7%

Note: Complete NAICS sector data is on page 39.

## MARLBOROUGH EMPLOYMENT REPORT



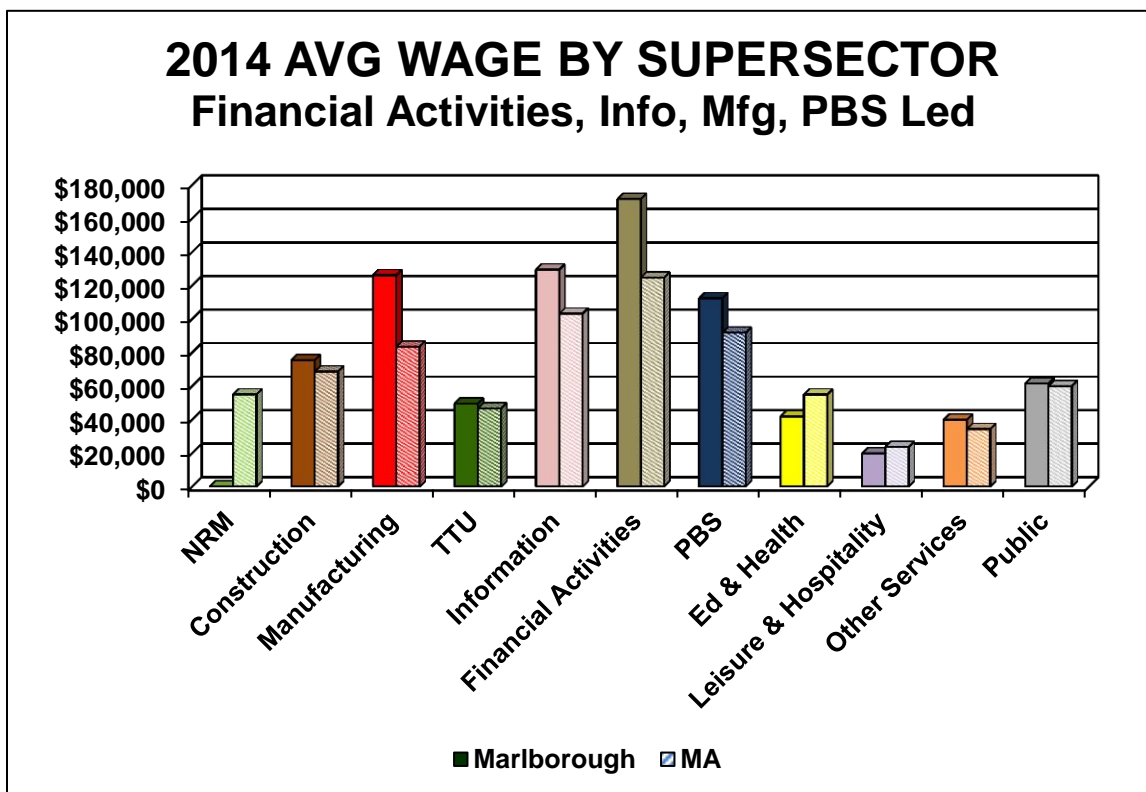
Source: U.S. BLS, MA EOLWD, MERC

- Marlborough's nominal average annual wage in orange rose from \$14,000 in 1980 to a historical peak of \$86,000 in 2014, a gain of 514%. This wage is not corrected for inflation.
- The city's real average annual wage, or the nominal average wage corrected for inflation in blue, increased from \$16,900 in 1980 to \$33,600 in 2014, a gain of 99%. This represents an average rate of increase of 2.1% per year. Marlborough's real wage is calculated using the Boston Consumer Price Index (CPI) for all Urban Wage Earners and Clerical Workers which uses 1982-1984 as the base year in correcting for inflation.
- Marlborough's nominal average wage reached a new high in 2014. However, Marlborough's real average wage was \$1,800 below its 2010 peak.

Marlborough	1980	1990	2000	2005	2010	2014
Nominal Wage	\$14,000	\$34,500	\$55,600	\$65,900	\$84,400	\$86,000
Real Wage	\$16,900	\$24,800	\$30,500	\$30,600	\$35,500	\$33,600



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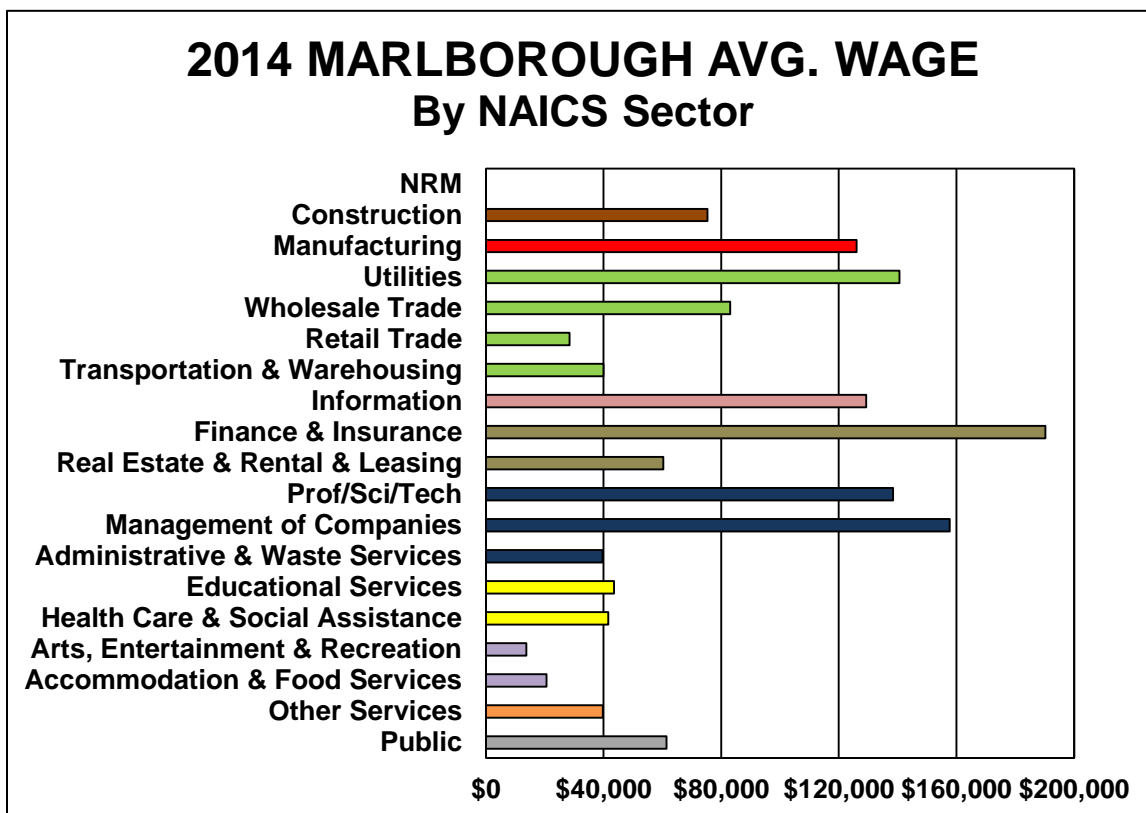
Source: MA EOLWD, MERC

- The 2014 Marlborough average annual wage of \$86,000 exceeded the MA average annual wage of \$64,100 by 34%.
- Among all Marlborough supersectors (solid bars) in 2014, Financial Activities generated the top average annual wage, \$171,500, followed by Information (\$129,300), Manufacturing (\$126,000) and Professional Business Services (PBS) (\$112,300). Leisure and Hospitality offered the lowest average wage, \$19,700.
- Among all Massachusetts supersectors (striped bars), Financial Activities led with an average annual wage of \$124,600, followed by Information (\$103,100), PBS (\$91,700), and Manufacturing (\$83,400).
- Marlborough exceeded the MA average annual wages in all but three supersectors: NRM, Education and Health, and Leisure and Hospitality.

Supersector	Marlborough Average Wage	Supersector	Marlborough Average Wage
Financial Activities	\$171,500	TTU	\$49,400
Information	\$129,300	Education & Health	\$41,700
Manufacturing	\$126,000	Other Services	\$39,800
PBS	\$112,300	Leisure & Hospitality	\$19,700
Construction	\$75,300	Natural Resources	*
Public	\$61,400	<b>Total Marlborough</b>	<b>\$86,000</b>

\*Note: Natural Resources and Mining (NRM) had no employment in 2014.

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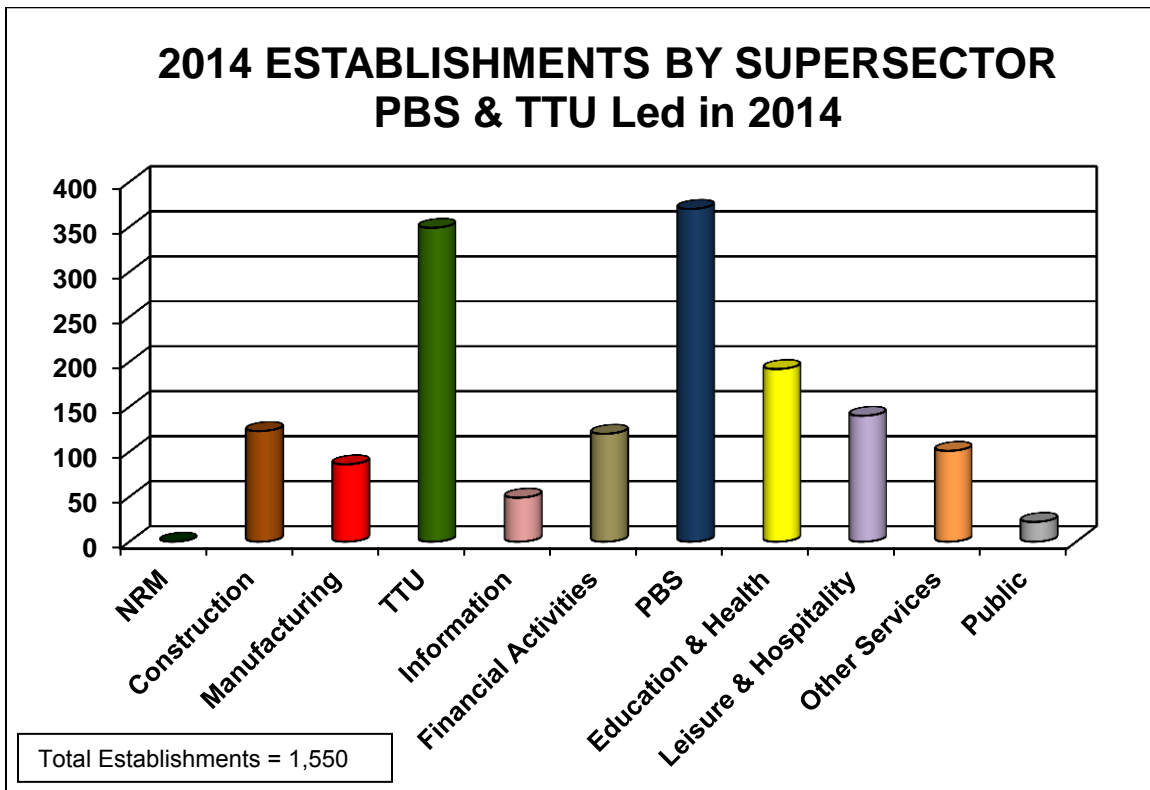
Source: MA EOLWD, MERC

- In 2014 the Marlborough average annual wage recorded a historical high of \$86,000, a 7.8% increase from 2013.
- Among the NAICS sectors, Finance & Insurance posted the highest average annual wage of \$190,300, followed by Management of Companies (\$157,700) and Utilities (\$140,600).
- Average wages in three additional sectors exceeded \$120,000: Professional/Scientific/Technical (Prof/Sci/Tech) (\$138,500), Information (\$129,300), and Manufacturing (\$126,000).
- Three sectors, Arts, Entertainment & Recreation, Accommodation & Food Services, and Retail Trade, each produced average annual wages less than \$28,500.
- Average wages in the remaining sectors ranged from \$39,600 to \$83,000.

NAICS Sector	Average Wage
Finance & Insurance	\$190,300
Management of Companies	\$157,700
Utilities	\$140,600
Prof/Sci/Tech	\$138,500

Note: Complete NAICS sector data is on page 39.

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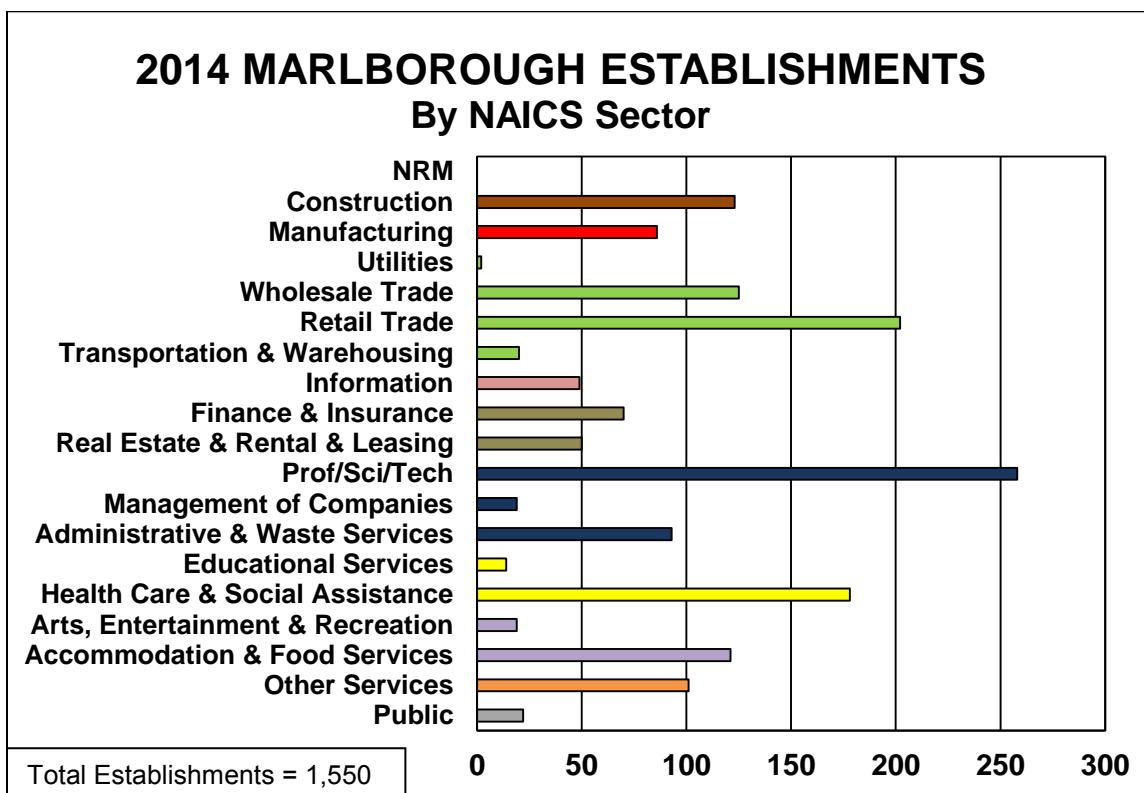


Source: MA EOLWD, MERC

- In 2014 the total number of establishments or separate places of work in Marlborough was 1,550, up 3.9% from 2013.
- Together, the two largest supersectors, Professional and Business Services (PBS) with 370 establishments and Trade, Transportation and Utilities with 350, had 46% of all Marlborough establishments.
- Education & Health, Leisure & Hospitality, Financial Activities, and Construction had between 100 and 200 establishments. Combined, they were home to 37% of all Marlborough places of work.
- The remaining four supersectors, Manufacturing, Information, Public, and Natural Resources and Mining, each had fewer than 100 establishments sited in Marlborough.

Supersector	Establishments	Supersector	Establishments
PBS	370	Other Services	100
TTU	350	Manufacturing	90
Education & Health	190	Information	50
Leisure & Hospitality	140	Public	20
Construction	120	NRM	0
Financial Activities	120	<b>Total Marlborough</b>	<b>1,550</b>

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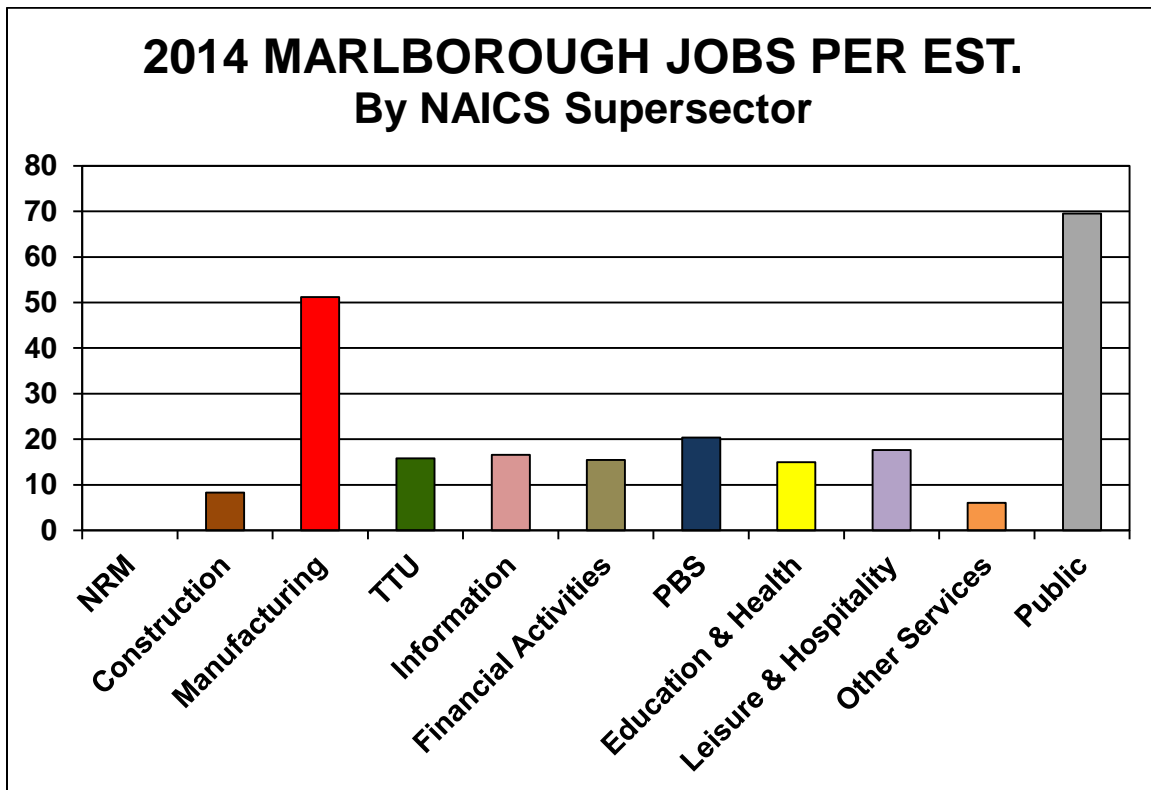
Source: MA EOLWD, MERC

- In 2014 1,550 establishments or separate places of work were located in Marlborough, an increase of 3.9% from 2013.
- Among all NAICS sectors, Professional, Scientific and Technical (Prof/Sci/Tech) led with 260 establishments, followed by Retail Trade with 200 and Health Care & Social Assistance with 180. These three sectors were home to 41% of Marlborough's establishments.
- Four other sectors had more than 100 establishments: Wholesale Trade, Construction, Accommodation & Food Services, and Other Services. Utilities had the smallest number of establishments in Marlborough: 2.

NAICS Sector	Establishments	% of Total
Prof/Sci/Tech	260	17%
Retail Trade	200	13%
Health Care & Social Assistance	180	12%
Wholesale Trade	125	8%
Construction	120	8%
Accommodation & Food Services	120	8%

Note: Complete NAICS sector data is on page 39.

## MARLBOROUGH EMPLOYMENT REPORT



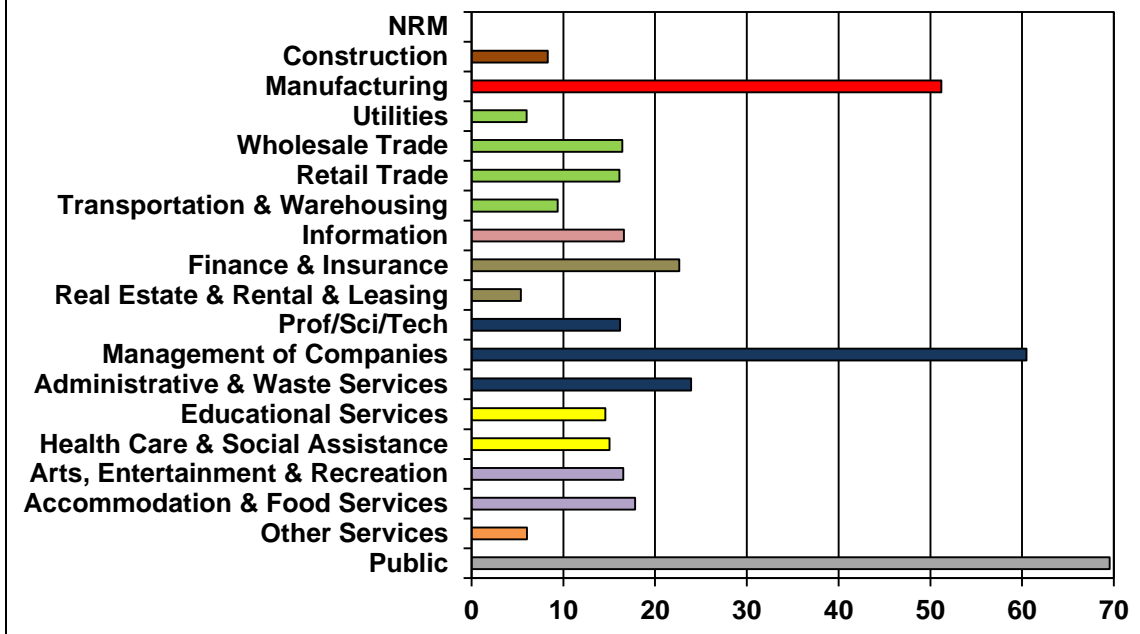
Source: MA EOLWD, MERC

- In 2014 establishments or separate places of work sited in Marlborough averaged 18.5 jobs per establishment, higher than the average for the Greater MetroWest region (GMW) (17.2), Massachusetts (14.3), and the United States (14.6).
- Among all NAICS supersectors, Public led with 69 jobs per establishment, followed by Manufacturing with 51, and Professional and Business Services (PBS) with 20 jobs.
- All the remaining supersectors averaged fewer than 20 per establishment.

Supersector	# Jobs per Establishment	Supersector	# Jobs per Establishment
Public	69	Financial Activities	15
Manufacturing	51	Ed & Health	15
PBS	20	Construction	8
Leisure & Hospitality	18	Other Services	6
Information	17	Natural Resources & Mining (NRM)	0
Trade, Transportation & Utilities (TTU)	16	<b>Marlborough</b>	<b>18</b>

## MARLBOROUGH EMPLOYMENT REPORT

### 2014 MARLBOROUGH JOBS PER EST. By NAICS Sector



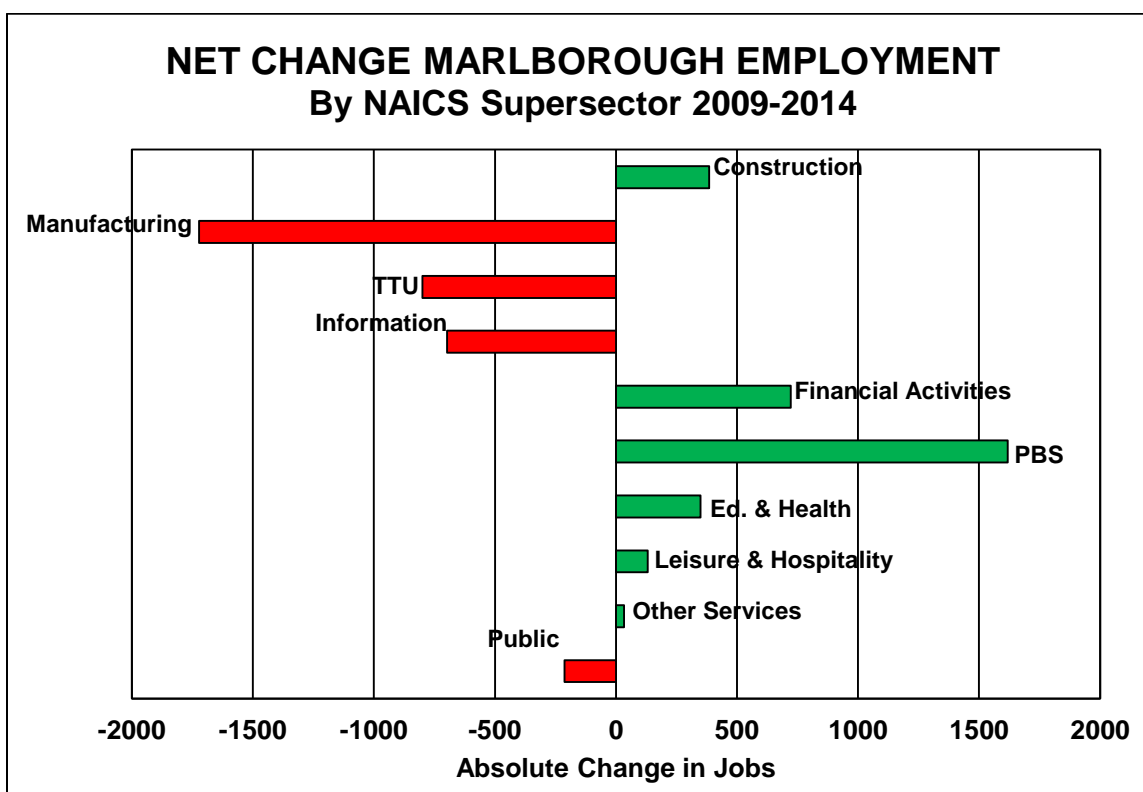
Source: MA EOLWD, MERC

- In 2014 Marlborough establishments or separate places of work averaged 18 jobs per establishment.
- Among the 19 NAICS sectors Public led with 70 jobs per establishment followed by Management of Companies (60) and Manufacturing (51).
- Five sectors, Transportation & Warehousing, Construction, Other Services, Utilities, and Real Estate & Rental & Leasing, each had fewer than 10 jobs per establishment.
- The number of jobs per establishment in the remaining sectors ranged from 24 in Administrative & Waste Services to 15 in Educational Services.

NAICS Sector	# Jobs per Establishment
Public	69
Management of Companies	60
Manufacturing	51
Administrative & Waste Services	24
Finance & Insurance	23
Accommodation & Food Services	18

Note: Complete NAICS Sector data is on page 39.

## MARLBOROUGH EMPLOYMENT REPORT



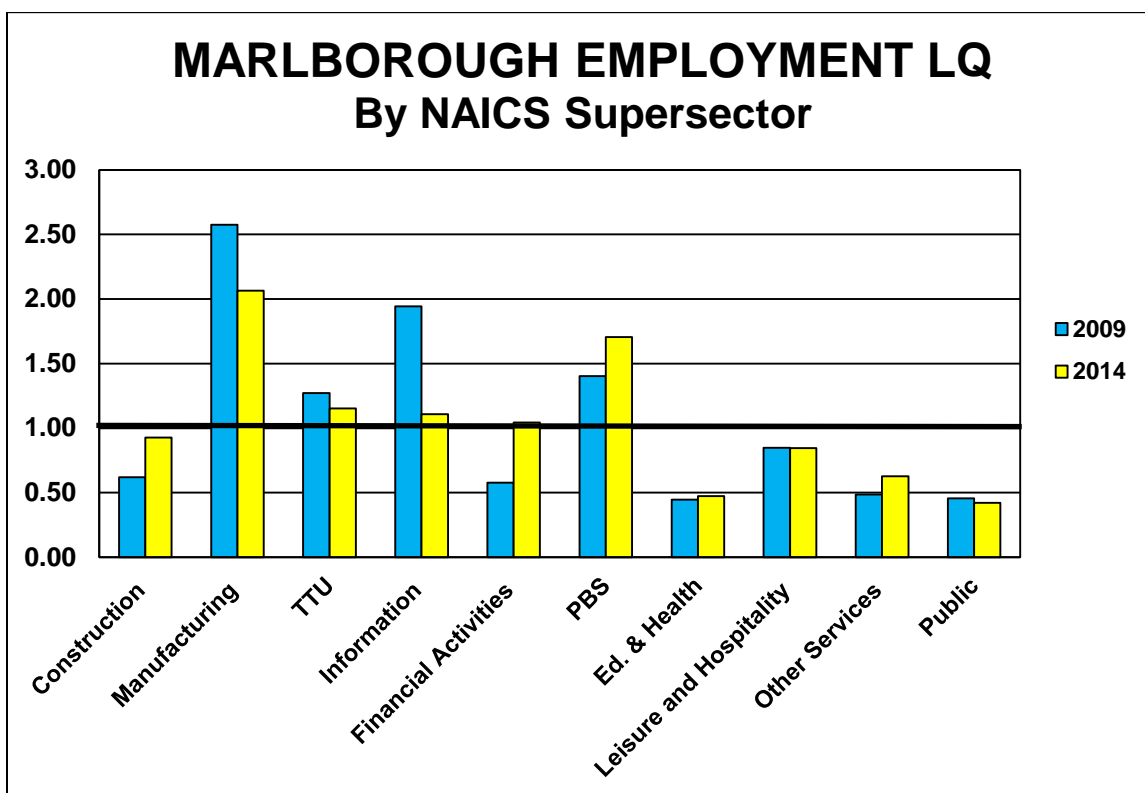
Source: MA EOLWD, MERC

- Total employment in Marlborough declined from 28,800 jobs in 2009 to 28,600 jobs in 2014, a decrease of 200 jobs or -0.7%.
- Six supersectors gained jobs. Professional and Business Services (PBS) generated the largest absolute gain adding 1,620 jobs or 27%, followed by Financial Activities up 720 jobs or 64%. Construction experienced the second highest percentage gain, up 390 jobs or 61%.
- Four supersectors lost jobs. Manufacturing lost 1,720 jobs or -28%, followed by Trade, Transportation & Utilities (TTU) down 800 jobs or -13%, Information down 700 jobs or -46%, and Public down 210 jobs or -12%.

Supersector	Absolute Change	% Change	Supersector	Absolute Change	% Change
Construction	390	61%	PBS	1,620	27%
Manufacturing	-1,720	-28%	Ed. & Health	350	14%
TTU	-800	-13%	Leisure & Hospitality	130	6%
Information	-700	-46%	Other Services	30	6%
Financial Activities	720	64%	Public	-210	-12%

Note: Natural Resources and Mining (NRM) had no employment and is not included.

## MARLBOROUGH EMPLOYMENT REPORT



Source: MA EOLWD, MERC

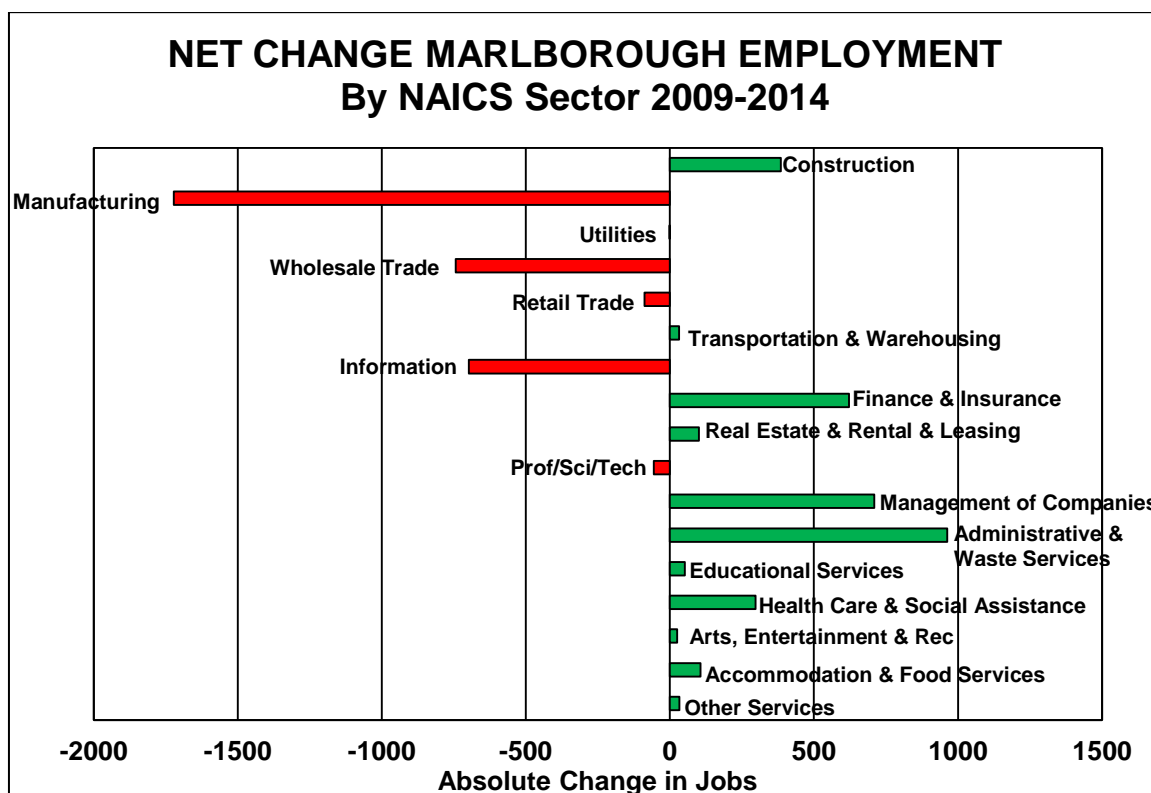
- Location quotients (LQ) compare the regional industry share of total private employment to the state share for the same industry in the same year.
- A regional LQ greater than 1.0 shows an industry concentration higher than that of the state. In both 2009 and 2014, four Marlborough supersectors had LQs exceeding 1.0: Manufacturing, Professional and Business Services (PBS), Trade, Transportation & Utilities (TTU), and Information.
- In both 2009 and 2014, Manufacturing achieved the highest LQ at 2.57 and 2.06, respectively, or a 157% and 106% greater concentration of Manufacturing jobs in Greater MetroWest (GMW) than existed statewide.

Supersector	2009 LQ	2014 LQ
Manufacturing	2.57	2.06
PBS	1.40	1.70
TTU	1.27	1.15
Information	1.94	1.11
Financial Activities	0.58	1.04
Construction	0.62	0.93

Note: Complete NAICS sector data on page 40.



## MARLBOROUGH EMPLOYMENT REPORT



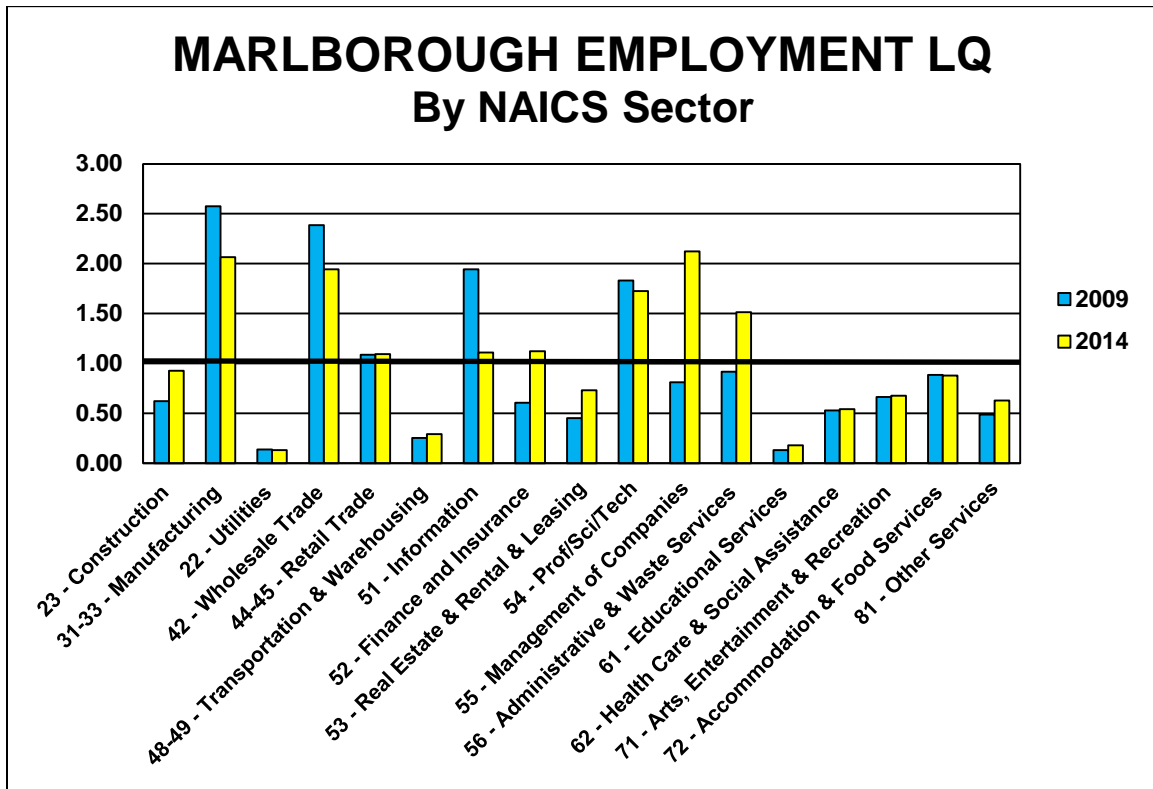
Source: MA EOLWD, MERC

- Total employment in Marlborough declined from 28,800 jobs in 2009 to 28,600 jobs in 2014, a decrease of 200 jobs or -0.7%.
- Employment in 11 NAICS sectors rose from 2009-2014. Administrative & Waste Services provided the largest absolute gain in employment at 960 jobs or 76%. Management of Companies generated the largest percentage change, up 162% (710 jobs). Finance & Insurance added 620 jobs or 65%.
- Employment declined in six sectors, with the largest absolute losses in Manufacturing, down 1,720 jobs (-28%), Wholesale Trade, down 740 jobs (-27%), and Information, down 700 jobs (-46%).

Sector	Absolute Change	% Change
Administrative & Waste Services	960	76%
Management of Companies	710	162%
Finance and Insurance	620	65%
Construction	390	61%
Health Care & Social Assistance	300	12%

Note: Complete NAICS sector data on page 41.

## MARLBOROUGH EMPLOYMENT REPORT



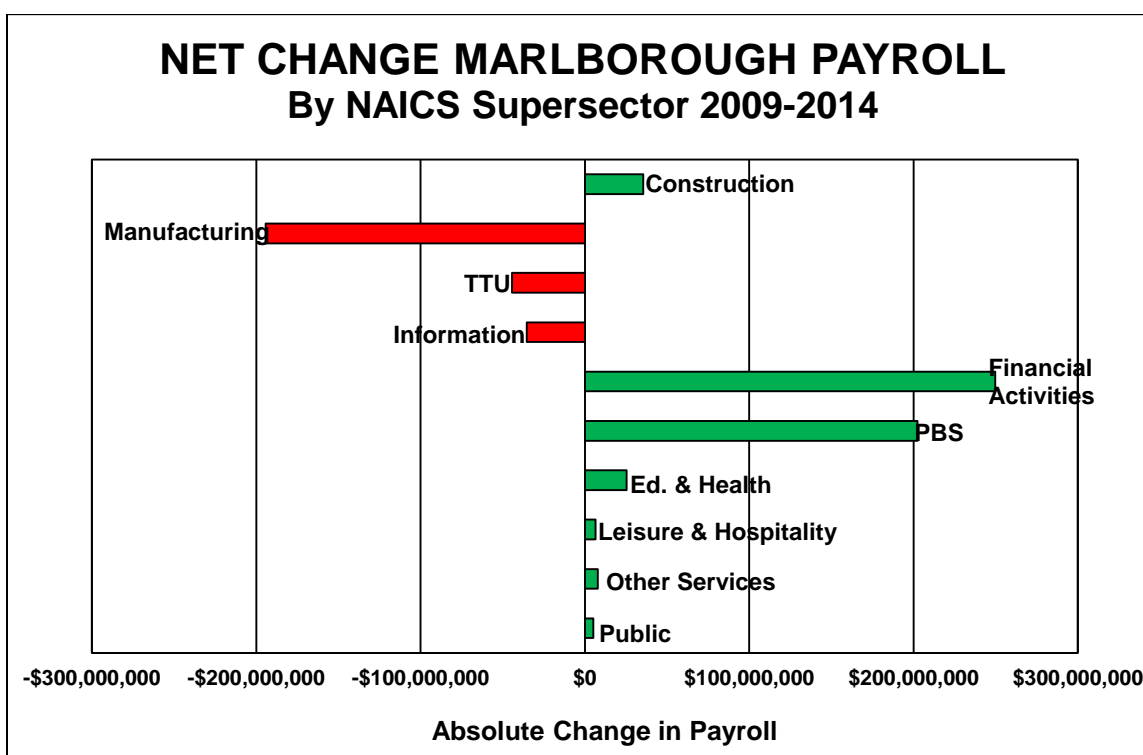
Source: MA EOLWD, MERC

- Location quotients (LQ) compare the regional industry share of total private employment to the state share for the same industry in the same year.
- A regional LQ greater than 1.0 shows an industry concentration higher than that of the state. In both 2009 and 2014, five Marlborough sectors had LQs exceeding 1.0: Manufacturing, Wholesale Trade, Professional, Scientific and Technical Services (Prof/Sci/Tech), Information and Retail Trade.
- A regional LQ less than 1.0 shows an industry concentration lower than that of the state. Marlborough had nine sectors with LQs less than 1.0 in 2014, down from 12 sectors in 2009.
- Declines in LQs occurred in the Manufacturing, Wholesale Trade, and Information sectors. Strong gains occurred in the Management of Companies, Administrative & Waste Services and Finance & Insurance sectors.

Sector	2009 LQ	2014 LQ
Management of Companies	0.81	2.12
Manufacturing	2.57	2.06
Wholesale Trade	2.39	1.94
Prof/Sci/Tech	1.83	1.73
Administrative & Waste	0.92	1.51
Finance and Insurance	0.61	1.12

Note: Complete NAICS sector data on page 40.

## MARLBOROUGH EMPLOYMENT REPORT

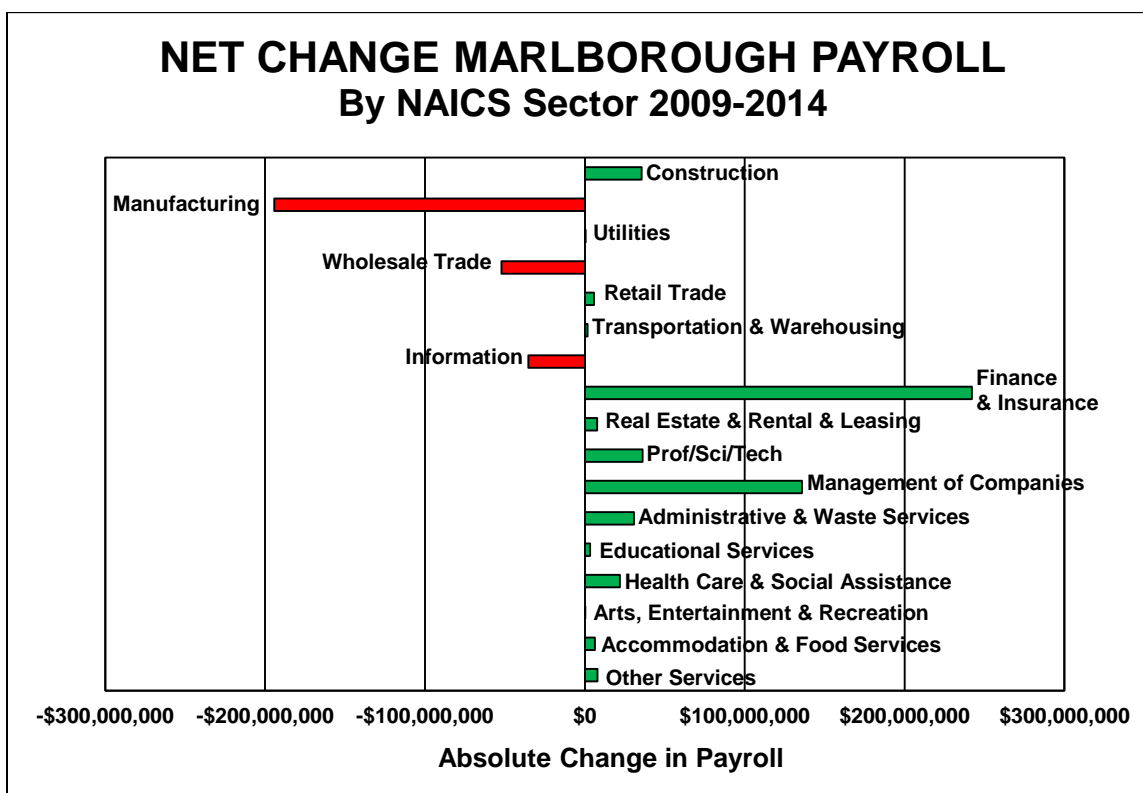


Source: MA EOLWD, MERC

- Total payroll in Marlborough rose from \$2.2 billion in 2009 to \$2.5 billion in 2014, an increase of \$300 million or 11.7%.
- Seven supersectors experienced gains in payroll. Among them Financial Activities generated the largest gain at \$250 million or 368%, followed by Professional and Business Services (PBS) at \$202 million or 31%.
- Three supersectors lost payroll. Manufacturing suffered the largest absolute and percentage losses with a decrease of \$194 million or -26%, followed by Trade, Transportation & Utilities (TTU) at -\$44 million (-14%) and Information at -\$35 million (-25%).

Supersector	Absolute Change (Millions)	% Change	Supersector	Absolute Change (Millions)	% Change
Construction	\$36	86%	PBS	\$202	31%
Manufacturing	-\$194	-26%	Ed. & Health	\$25	27%
TTU	-\$44	-14%	Leisure & Hospitality	\$7	16%
Information	-\$35	-25%	Other Services	\$8	48%
Financial Activities	\$250	368%	Public	\$5	6%

## MARLBOROUGH EMPLOYMENT REPORT



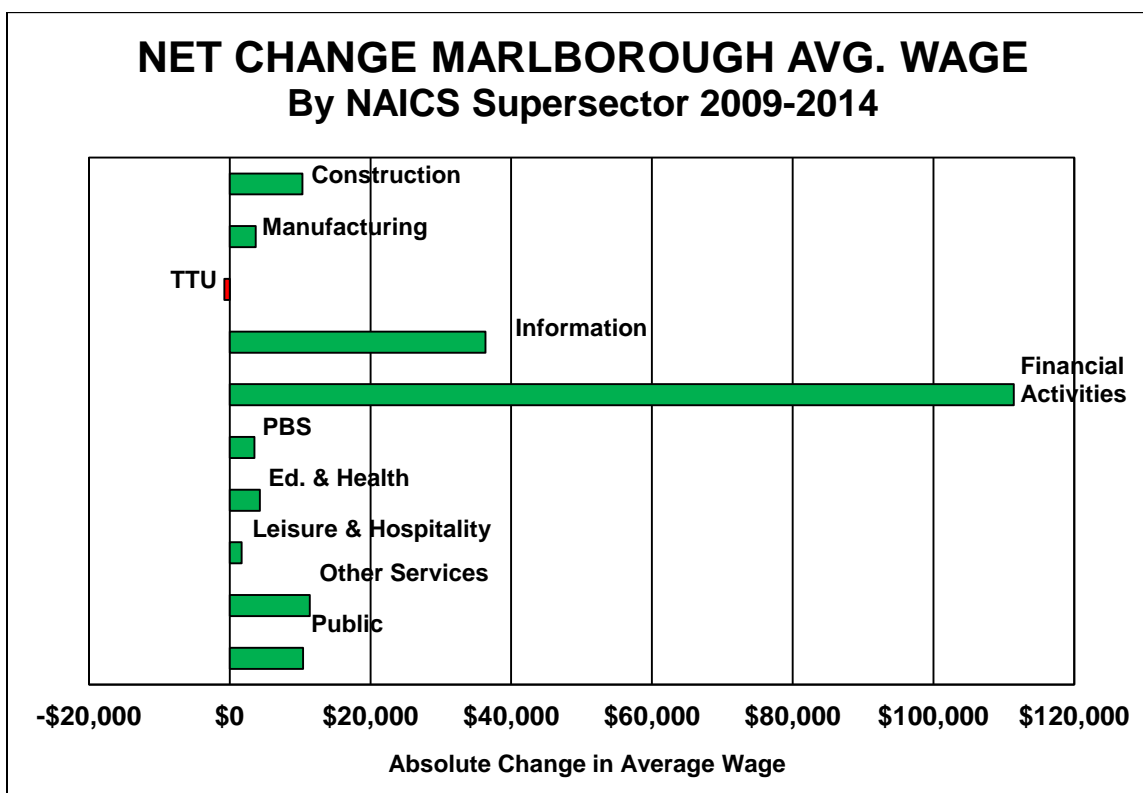
Source: MA EOLWD, MERC

- Total payroll in Marlborough rose from \$2.2 billion in 2009 to \$2.5 billion in 2014, an increase of \$300 million or 11.7%.
- Fourteen NAICS sectors gained payroll. Finance and Insurance provided the largest absolute and percentage gains with an increase of \$242 million or 407%, followed by Management of Companies up \$136 million or 298%.
- Three sectors experienced losses in payroll: Manufacturing with a loss of \$194 million or -26%, Wholesale Trade with a loss of \$52 million or -23%, and Information down \$35 million or -25%.

Sector	Absolute Change	% Change
Finance and Insurance	\$242 million	407%
Management of Companies	\$136 million	298%
Prof/Sci/Tech	\$36 million	7%
Construction	\$36 million	86%
Administrative & Waste Services	\$31 million	53%

Note: Complete NAICS sector data on page 41.

## MARLBOROUGH EMPLOYMENT REPORT

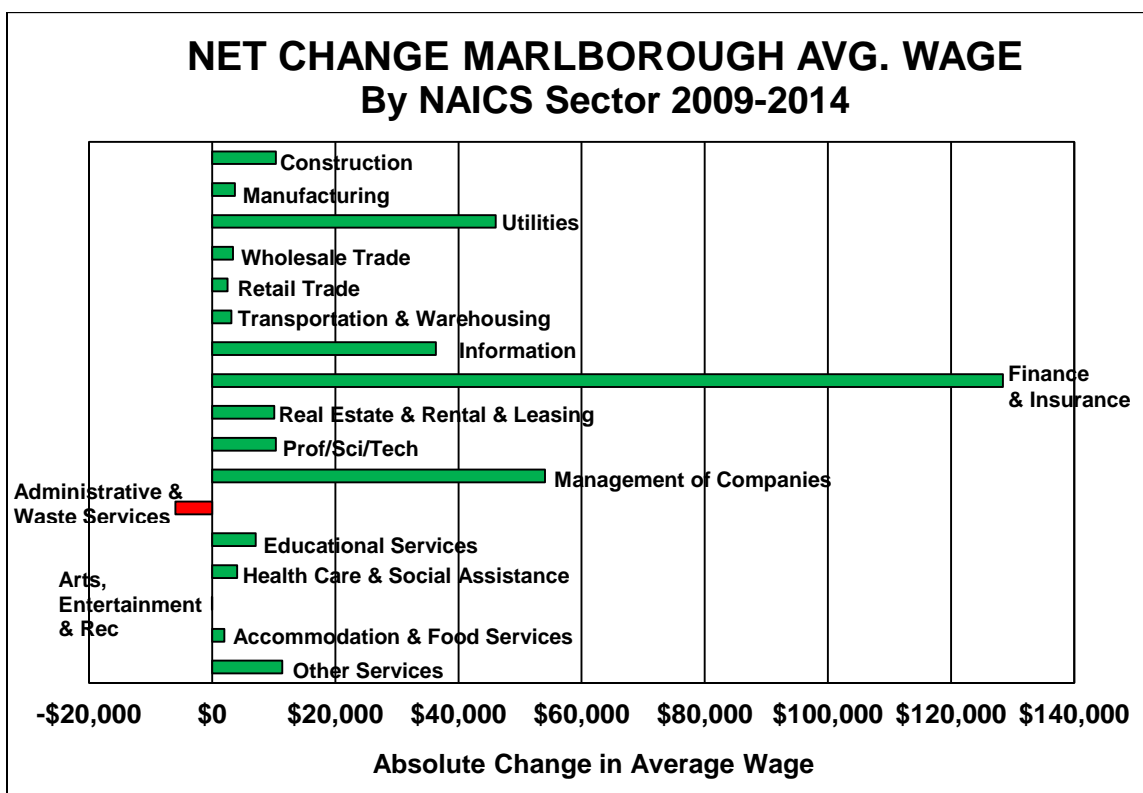


Source: MA EOLWD, MERC

- The Marlborough average annual wage rose from \$76,400 in 2009 to \$86,000 in 2014, an increase of \$9,500 or 12.5%.
- The average annual wage in nine supersectors rose. The largest absolute and percentage increases occurred in the Financial Activities supersector, up \$111,400 or 186%, followed by Information up \$36,400 or 39%, and Other Services, up \$11,400 or 40%.
- Trade, Transportation & Utilities (TTU) was the only NAICS supersector to experience absolute and percentage losses in average annual wage, declining by \$700 or -1.5%.

Supersector	Absolute Change	% Change	Supersector	Absolute Change	% Change
Construction	\$10,300	16%	PBS	\$3,500	3%
Manufacturing	\$3,700	3%	Ed. & Health	\$4,300	11%
TTU	-\$700	-1.5%	Leisure & Hospitality	\$1,700	9%
Information	\$36,400	39%	Other Services	\$11,400	40%
Financial Activities	\$111,400	186%	Public	\$10,400	20%

## MARLBOROUGH EMPLOYMENT REPORT



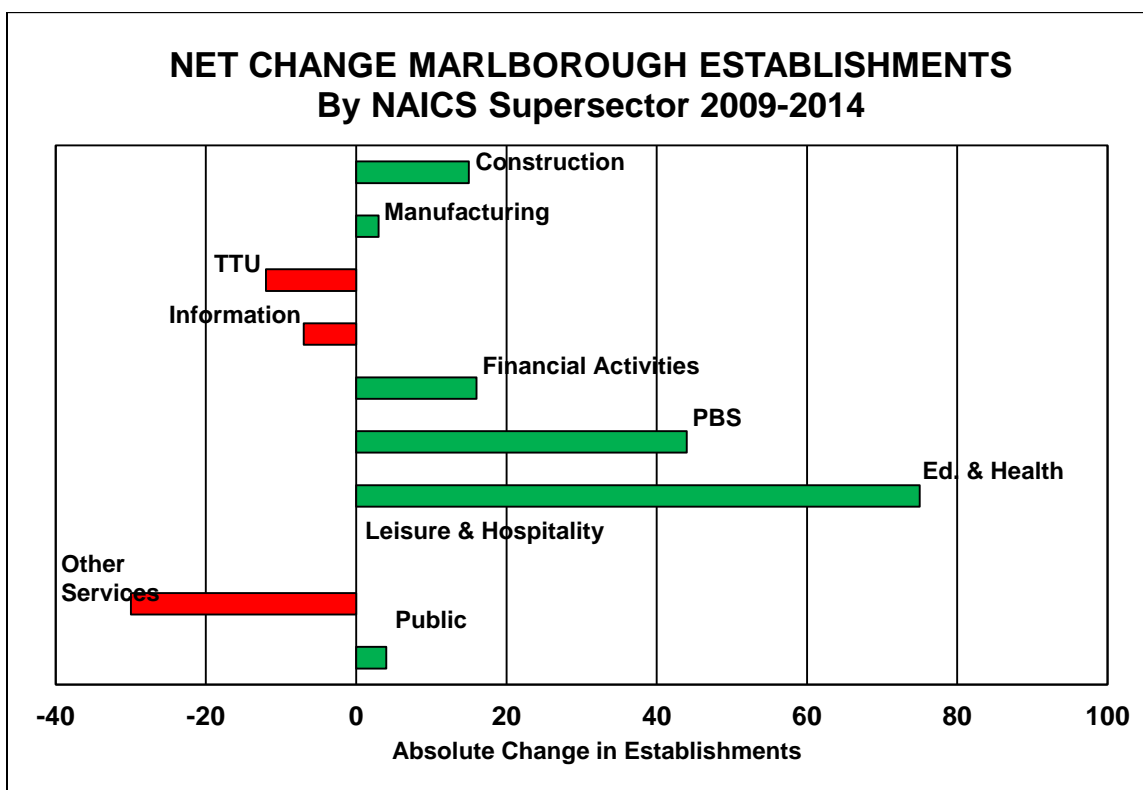
Source: MA EOLWD, MERC

- The Marlborough average annual wage rose from \$76,400 in 2009 to \$86,000 in 2014, an increase of \$9,500 or 12.5%.
- All but two sectors generated gains in average wage. Finance and Insurance generated the largest wage gain with an increase of \$128,500 or 208%. Management of Companies provided the second highest wage gain, up \$54,100 or 52.0%, followed by Utilities, up \$46,100 or 49%.
- Administrative & Waste Services and Arts, Entertainment & Recreation were the only two sectors to experience losses in average annual wage, with decreases of -\$6,000 or -13% and -\$30 or -0.2%.

Sector	Absolute Change	% Change
Finance and Insurance	\$128,500	208%
Management of Companies	\$54,100	52%
Utilities	\$46,100	49%
Information	\$36,400	39%
Other Services	\$11,400	40%

Note: Complete NAICS sector data on page 42.

## MARLBOROUGH EMPLOYMENT REPORT

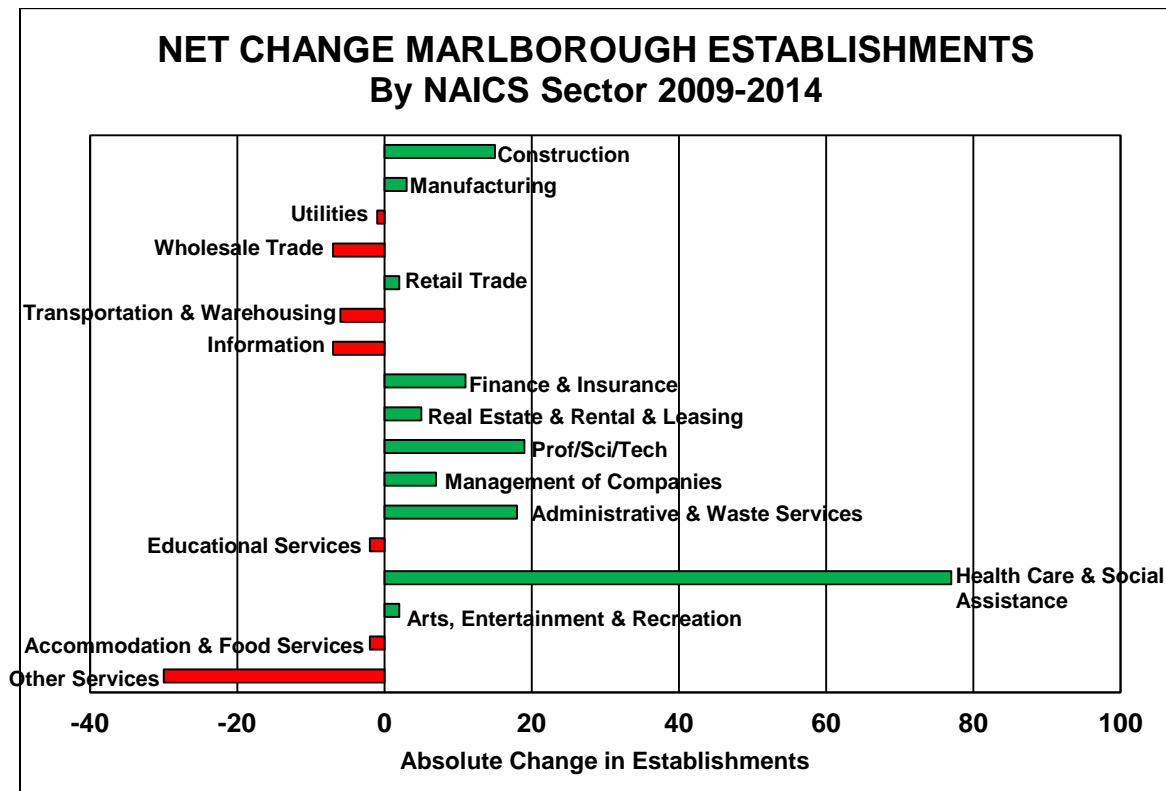


Source: MA EOLWD, MERC

- From 2009 to 2014, the number of establishments in Marlborough increased from 1,440 to 1,550, an increase of 110 establishments or 7.5%.
- Among all NAICS supersectors, Education & Health Services generated the largest absolute and percentage net changes, increasing by 75 establishments or 64%, followed by Professional and Business Services (PBS) up 40 establishments or 14%.
- Three supersectors experienced decreases in establishments. Other Services provided the largest loss with a decline of 30 establishments or -23%, followed by Trade, Transportation & Utilities (TTU) (-10 establishments or -3%) and Information (-10 establishments or -13%).

Supersector	Absolute Change	% Change	Supersector	Absolute Change	% Change
Construction	15	14%	PBS	40	14%
Manufacturing	3	4%	Ed. & Health	75	64%
TTU	-10	-3%	Leisure & Hospitality	0	0%
Information	-10	-13%	Other Services	-30	-23%
Financial Activities	20	15%	Public	4	-22%

## MARLBOROUGH EMPLOYMENT REPORT



Source: MA EOLWD, MERC

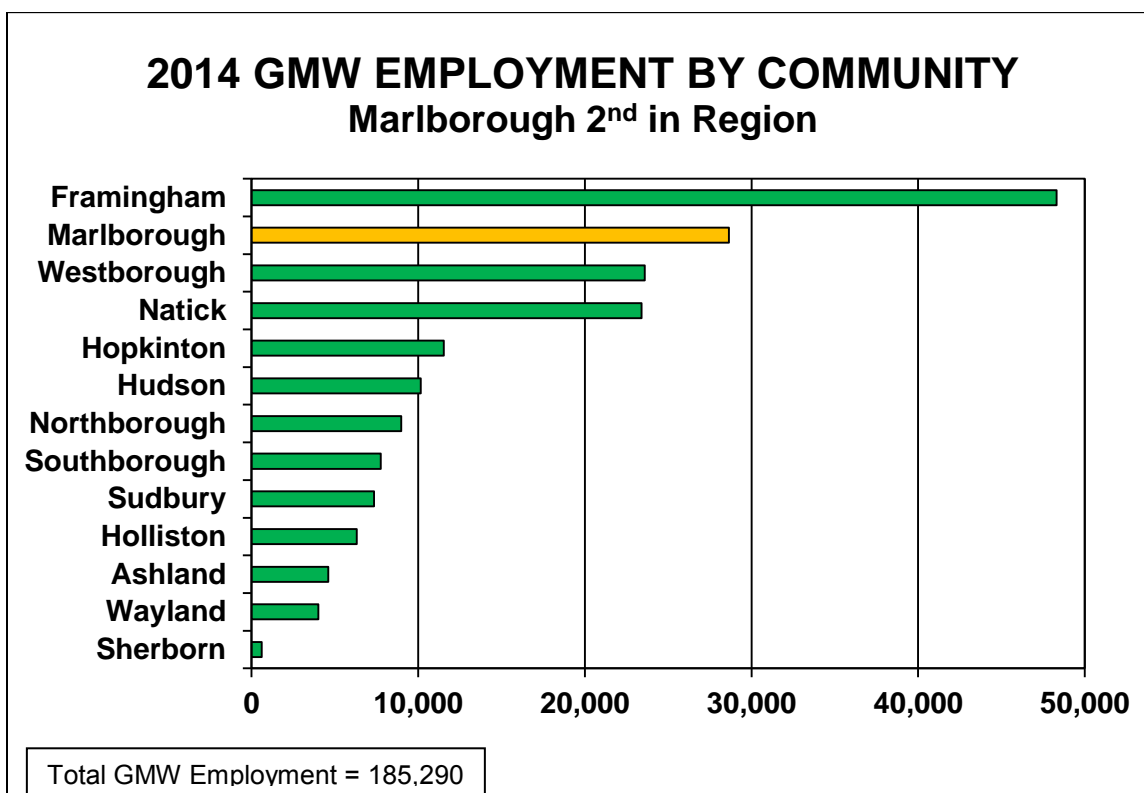
- From 2009 to 2014, the number of establishments in Marlborough increased from 1,440 to 1,550, an increase of 110 establishments or 7.5%.
- Among all NAICS sectors, Health Care & Social Assistance generated the largest absolute and percentage gains with an increase of 80 establishments or 76%, followed by Professional, Scientific & Technical Services (Prof/Sci/Tech) at 20 establishments (8%).
- Seven sectors experienced absolute and percentage losses with Other Services generating the largest absolute loss with -30 establishments. Utilities provided the largest percentage loss at -33%.

Sector	Absolute Change	% Change
Health Care & Social Assistance	80	76%
Prof/Sci/Tech	20	8%
Administrative & Waste Services	20	24%
Construction	15	14%
Finance and Insurance	10	19%

Note: Complete NAICS sector data on page 42.



## MARLBOROUGH EMPLOYMENT REPORT

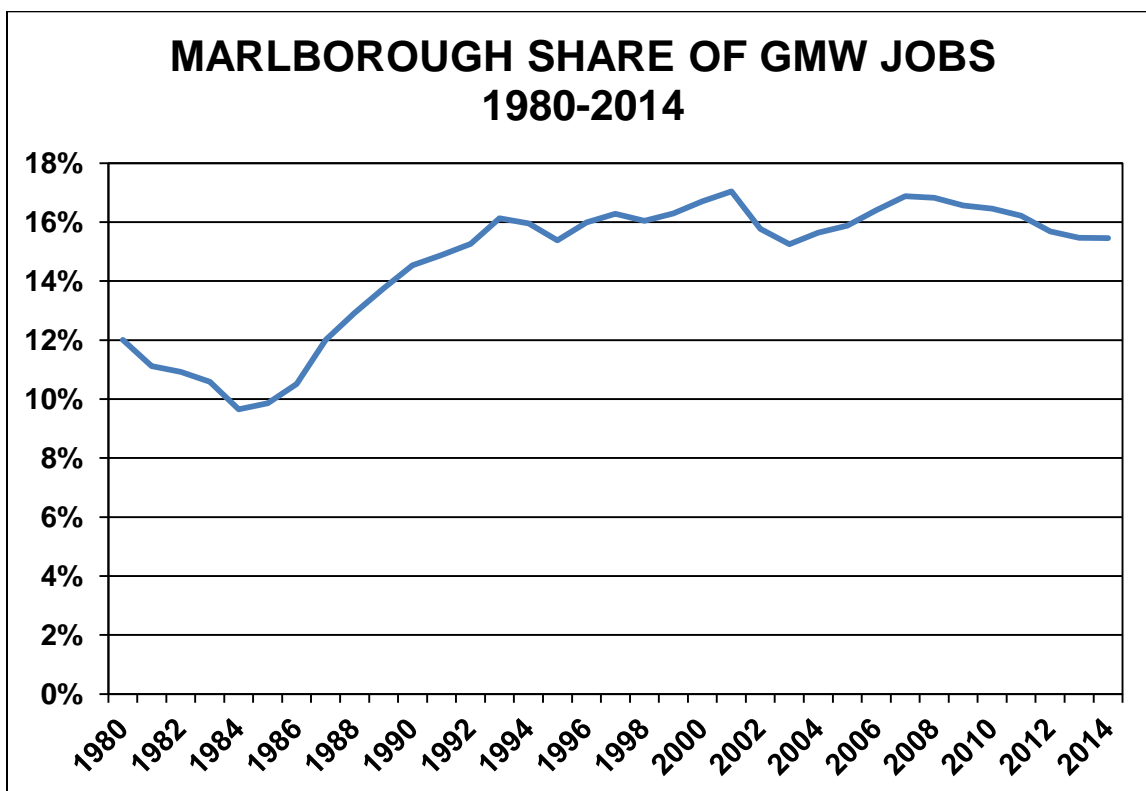


Source: MA EOWLD, MERC

- In 2014 Greater MetroWest region (GMW) employment totaled 185,290 jobs, up 2.7% from 2013.
- Among the thirteen GMW communities in 2014, 28,640 jobs were located in Marlborough. This was the second-highest number of jobs in the region and represented 15.5% of regional employment.
- Together Framingham, Marlborough, Westborough and Natick produced almost 124,000 jobs, or two-thirds of the region's total jobs in 2014.

Communities	Number of Jobs	Communities	Number of Jobs
Framingham	48,310	Southborough	7,750
<b>Marlborough</b>	<b>28,640</b>	Sudbury	7,350
Westborough	23,600	Holliston	6,320
Natick	23,400	Ashland	4,610
Hopkinton	11,540	Wayland	4,010
Hudson	10,160	Sherborn	620
Northborough	8,980	<b>GMW</b>	<b>185,290</b>

## **MARLBOROUGH EMPLOYMENT REPORT**

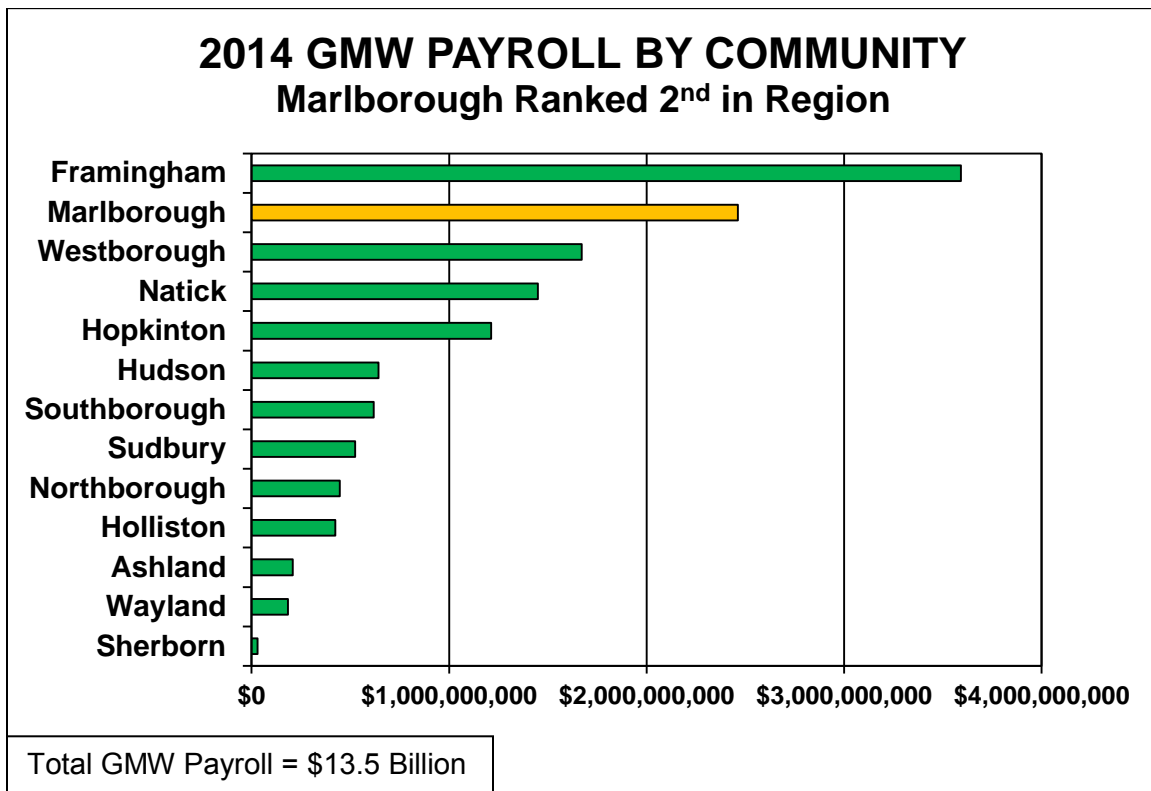


Source: MA EOLWD, MERC

- In 2014 the 28,640 jobs located in Marlborough represented 15.5% of the 185,290 jobs in establishments located within the 13 Greater MetroWest region (GMW) communities.
- The fraction of GMW jobs located in Marlborough was 12.0% in 1980, fell to 9.7% in 1984 and then rose to 16.1% in 1993. Since that time, it has fluctuated between 15 and 17 percent.
- Marlborough's largest percentage share of GMW employment occurred in 2001, when 17% of the total number of jobs in the 13 GMW communities were located in the city.

Year	Marlborough Employment	GMW Employment	Marlborough's Share of GMW Employment
1980	13,490	112,390	12.0%
1990	20,530	141,250	14.5%
2000	28,860	172,790	16.7%
2010	28,830	175,240	16.5%
2014	28,640	185,290	15.5%

## MARLBOROUGH EMPLOYMENT REPORT

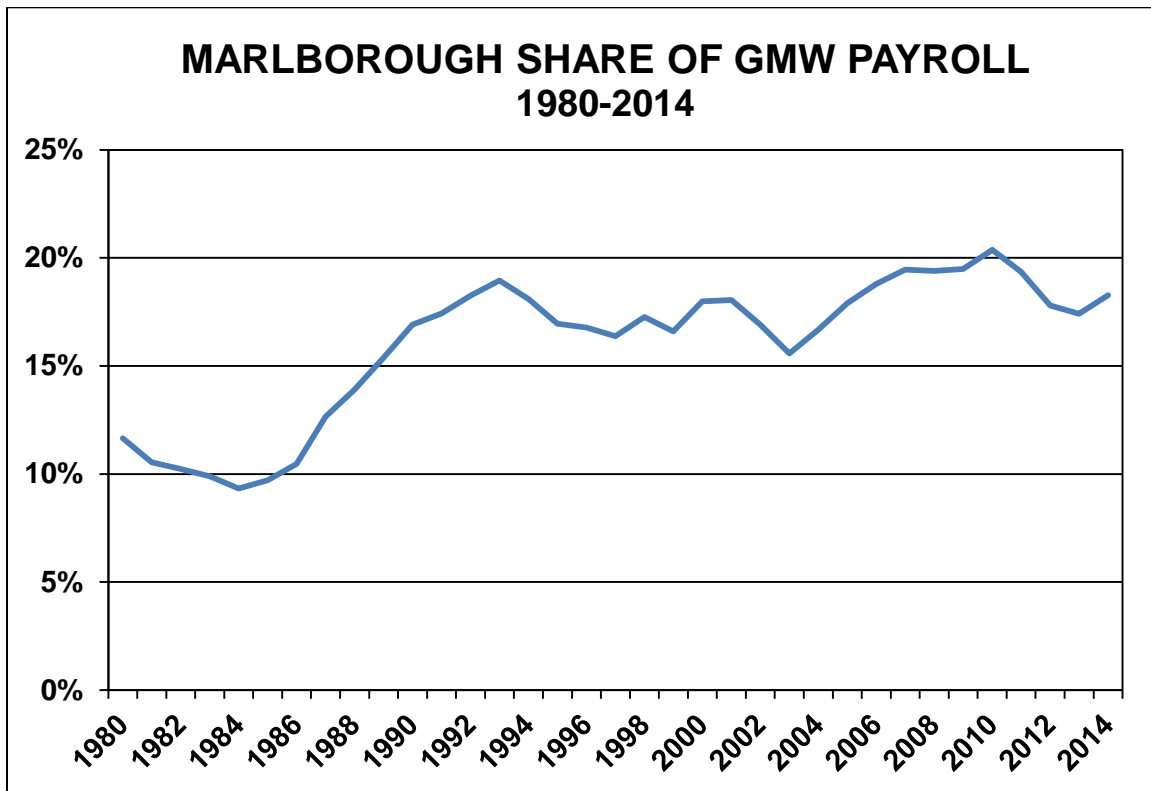


Source: MA EOLWD, MERC

- In 2014 payroll in the Greater MetroWest region (GMW) totaled \$13.5 billion, a gain of 5.4% from 2013.
- Among the thirteen communities, Marlborough businesses produced the second largest share of the region's payroll, \$2.5 billion, or just over 18% of regional payroll.
- The five top communities, Framingham, Marlborough, Westborough, Natick, and Hopkinton, generated over \$10 billion in payroll. This was about 77% of regional payroll.

Communities	Payroll	Communities	Payroll
Framingham	\$3.6 billion	Sudbury	\$525 million
<b>Marlborough</b>	<b>\$2.5 billion</b>	Northborough	\$446 million
Westborough	\$1.7 billion	Holliston	\$424 million
Natick	\$1.5 billion	Ashland	\$208 million
Hopkinton	\$1.2 billion	Wayland	\$184 million
Hudson	\$642 million	Sherborn	\$30 million
Southborough	\$618 million	<b>GMW</b>	<b>\$13.5 billion</b>

## MARLBOROUGH EMPLOYMENT REPORT

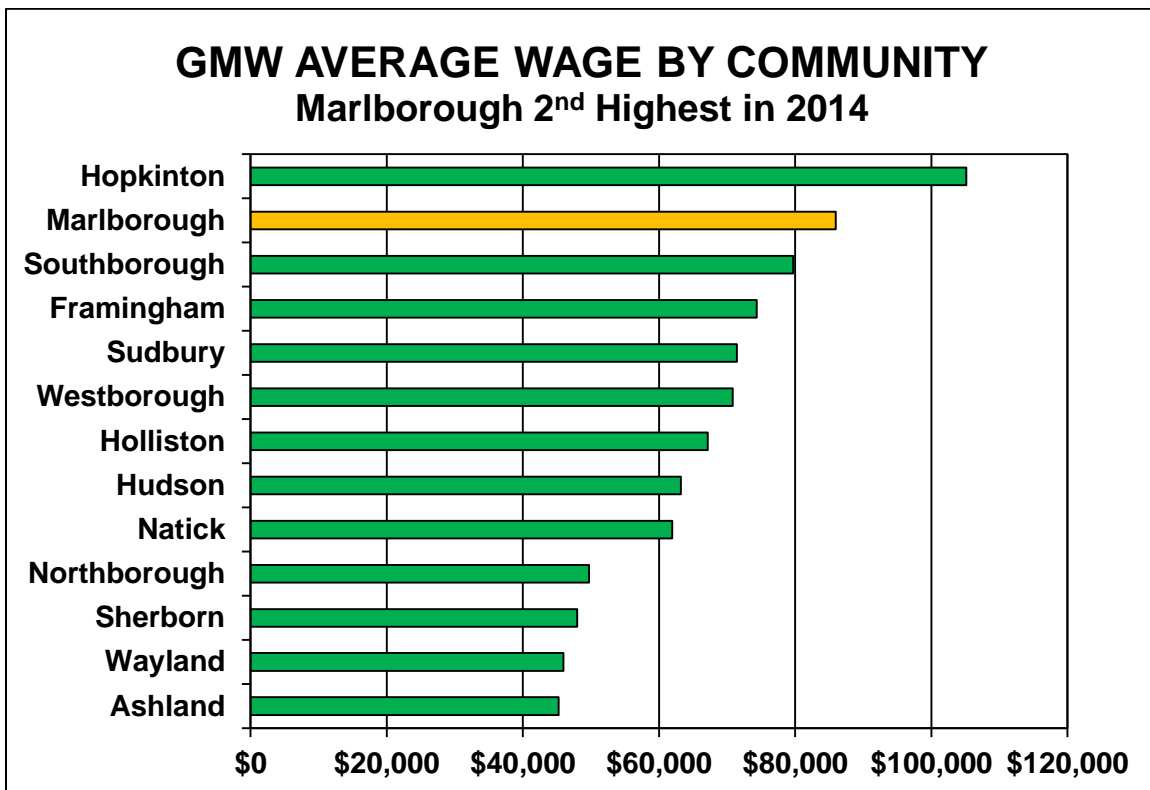


Source: MA EOLWD, MERC

- In 2014 payroll in Marlborough totaled \$2.5 billion, slightly more than 18% of the Greater MetroWest region's (GMW) payroll of \$13.5 billion.
- Businesses located in Marlborough produced a total payroll of \$189 million in 1980, 12% of the total GMW payroll of \$1.6 billion.
- In 2010 Marlborough's share of total GMW payroll reached its peak; in that year the city's firms generated a total payroll of \$2.4 billion, 20% of total regional payroll. Marlborough's share then declined to 17% in 2013 before recovering to slightly over 18% in 2014.
- Since 1990 Marlborough's share of GMW payroll has varied between 16% and 20%.

Year	Marlborough Payroll	GMW Payroll	Marlborough's % Share of GMW Payroll
1980	\$189 million	\$1.6 billion	12%
1990	\$708 million	\$4.2 billion	17%
2000	\$1.6 billion	\$8.9 billion	18%
2010	\$2.4 billion	\$11.9 billion	20%
2014	\$2.5 billion	\$13.5 billion	18%

## MARLBOROUGH EMPLOYMENT REPORT

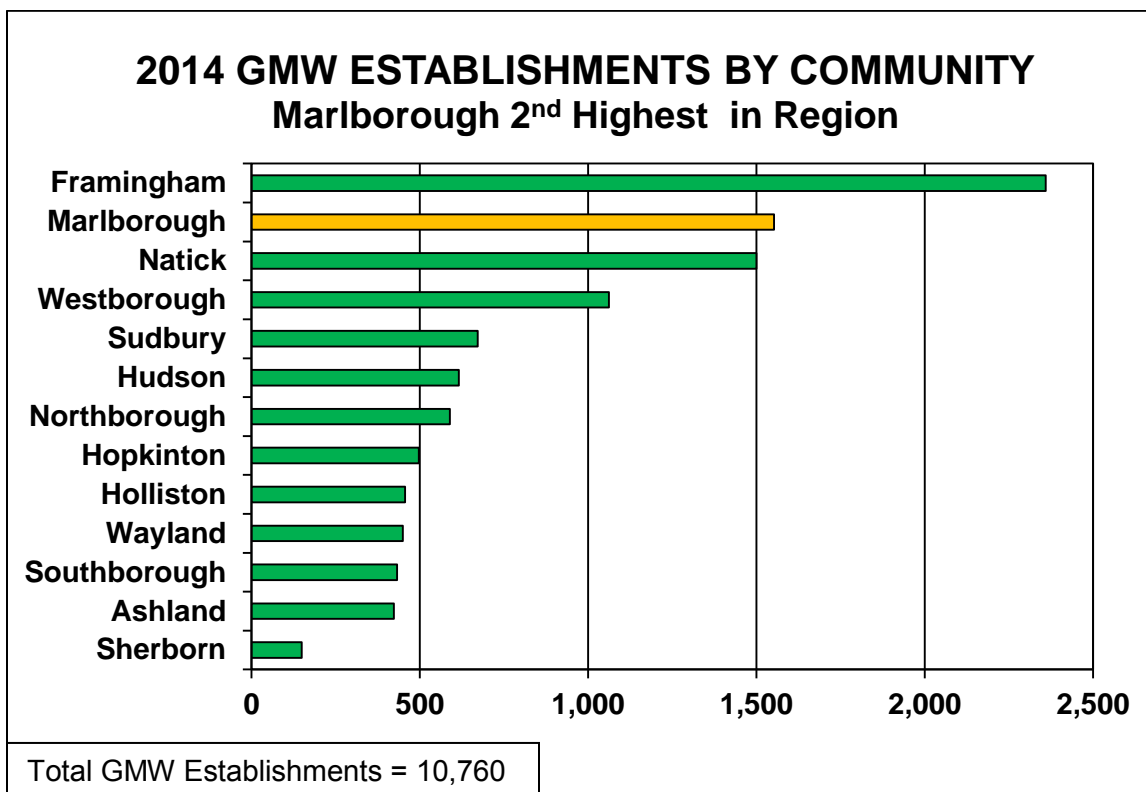


Source: MA EOWLD, MERC

- In 2014 the average annual wage in the Greater MetroWest region (GMW) was \$72,700, up 2.6% from \$70,800 in 2013.
- Among the thirteen GMW communities, Marlborough produced the second highest average annual wage, \$86,000, up 7.8% from 2013.
- The 2014 the average annual wage in Marlborough exceeded the GMW average wage of \$72,700 by 18%, the Massachusetts average wage of \$64,100 by 34%, and the U.S. average wage of \$51,400 by 67%.

Communities	Average Wage	Communities	Average Wage
Hopkinton	\$105,200	Natick	\$62,000
<b>Marlborough</b>	<b>\$86,000</b>	Northborough	\$49,700
Southborough	\$79,700	Sherborn	\$48,000
Framingham	\$74,300	Wayland	\$45,900
Sudbury	\$71,400	Ashland	\$45,200
Westborough	\$70,800	<b>GMW</b>	<b>\$72,700</b>
Holliston	\$67,200	<b>MA</b>	<b>\$64,100</b>
Hudson	\$63,200	<b>U.S.</b>	<b>\$51,400</b>

## MARLBOROUGH EMPLOYMENT REPORT

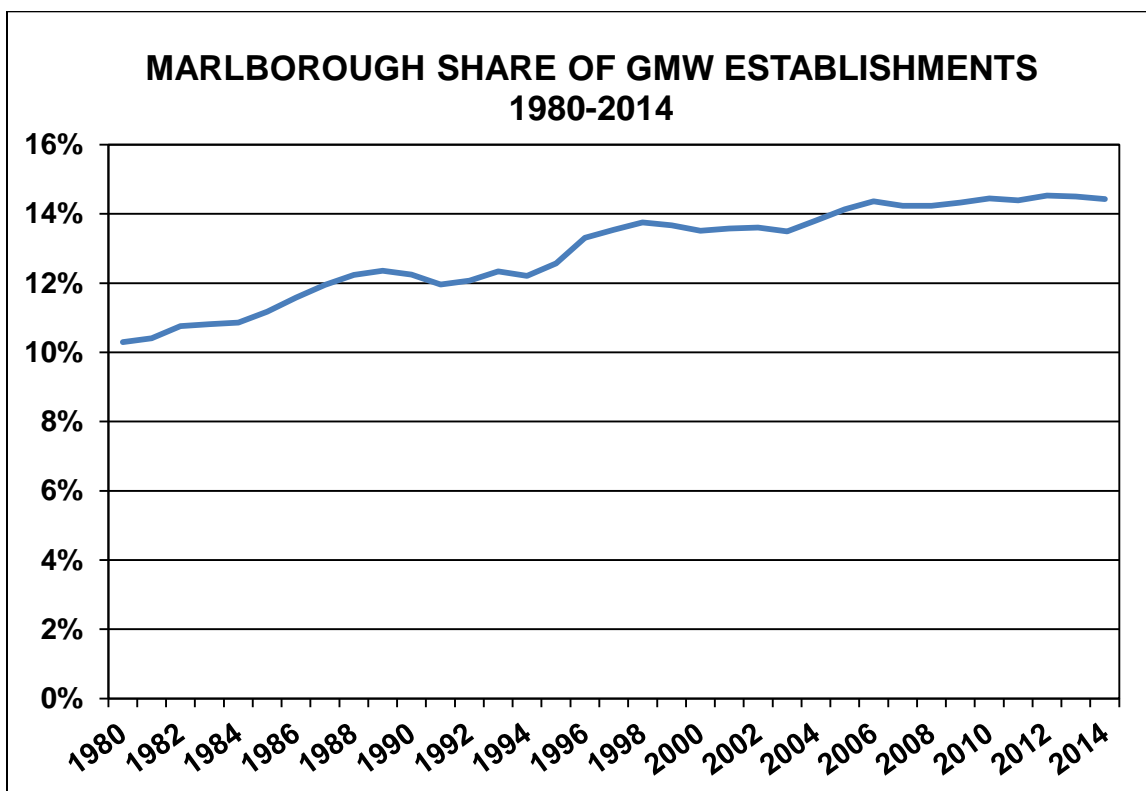


Source: MA EOWLD, MERC

- In 2014 the number of establishments or separate places of work in the Greater MetroWest region (GMW) totaled 10,760, an increase of 460 establishments (4.4%) since 2013.
- A total of 1,550 establishments were located in Marlborough. This was the second highest number among the thirteen GMW communities and represented 14% of the region's total establishments.
- Sixty percent of all GMW establishments were sited in four communities: Framingham, Marlborough, Natick, and Westborough.

Communities	Establishments	Communities	Establishments
Framingham	2,360	Hopkinton	500
<b>Marlborough</b>	<b>1,550</b>	Holliston	460
Natick	1,500	Wayland	450
Westborough	1,060	Southborough	430
Sudbury	670	Ashland	420
Hudson	620	Sherborn	150
Northborough	590	<b>GMW</b>	<b>10,760</b>

## MARLBOROUGH EMPLOYMENT REPORT



Source: MA EOLWD, MERC

- In 1980 Marlborough was home to 500 (10%) of the Greater MetroWest region's (GMW) 4,820 establishments or separate places of work. By 2014 the total number of establishments in the city was 1,550, representing 14% of the region's 10,760 establishments.
- From 1980 to 2004 Marlborough's share of GMW establishments rose slowly and steadily from 10% to 14%. Since that time the city's share has remained essentially constant at 14%.
- Since 1980 the number of GMW establishments increased by 123% while the number of establishments located in Marlborough rose by 213%, resulting in the increase in the city's share of the total number of establishments in the region.

Year	Marlborough Establishments	GMW Establishments	Marlborough's % Share of GMW Establishment
1980	500	4,820	10%
1990	1,000	8,130	12%
2000	1,290	9,520	14%
2010	1,490	10,300	14%
2014	1,550	10,760	14%

## MARLBOROUGH EMPLOYMENT REPORT

### NAICS Employment Data By Supersector Marlborough 2014

NAICS Supersector	Number of Jobs*	Average Wage*	Total Payroll* (Millions)	Number of Establishments*
Natural Resources & Mining (NRM)	0	\$0	\$0	0
Construction	1,020	\$75,300	\$77	120
Manufacturing	4,400	\$126,000	\$555	90
Trade, Transportation & Utilities (TTU)	5,510	\$49,400	\$272	350
Information	810	\$129,300	\$105	50
Financial Activities	1,850	\$171,500	\$318	120
Professional & Business Services (PBS)	7,550	\$112,300	\$848	370
Education & Health	2,880	\$41,700	\$120	190
Leisure & Hospitality	2,470	\$19,700	\$49	140
Other Services	610	\$39,800	\$24	100
Public	1,530	\$61,400	\$94	20
<b>Total Marlborough</b>	<b>28,640</b>	<b>\$86,000</b>	<b>\$2.5 Billion</b>	<b>1,550</b>
Greater MetroWest Region (GMW)	185,280	\$72,700	\$13.5 Billion	10,760
Massachusetts (MA)	3,363,040	\$64,100	\$215.6 Billion	234,700
United States	136,613,609	\$51,400	\$7,017 Billion	9,361,354

Source: MA EOLWD, MERC \*Rounded



# MARLBOROUGH EMPLOYMENT REPORT

## NAICS Employment Data by Sector Marlborough 2014

NAICS Sector	Number of Jobs*	Average Wage*	Total Payroll* (Millions)	Number of Establishments*
Natural Resources & Mining (NRM)	0	\$0	\$0	0
Construction	1,020	\$75,300	\$77	120
Manufacturing	4,400	\$126,000	\$555	90
TTU**-Utilities	10	\$140,600	\$2	2
TTU**-Wholesale Trade	2,050	\$83,000	\$170	125
TTU**-Retail Trade	3,260	\$28,400	\$92.5	200
TTU**-Transportation & Warehousing	190	\$39,900	\$7.5	20
Information	810	\$129,300	\$105	50
Financial Activities**-Finance & Insurance	1,590	\$190,300	\$302	70
Financial Activities**-Real Estate & Rental & Leasing	270	\$60,300	\$16	50
PBS**-Professional/Scientific/Technical	4,180	\$138,500	\$578	260
PBS**-Management of Companies	1,150	\$157,700	\$181	20
PBS**-Administrative & Waste Services	2,220	\$39,600	\$88	90
Ed & Health**-Educational Services	200	\$43,500	\$9	10
Ed & Health**-Health Care & Social Assistance	2,680	\$41,600	\$111	180
Leisure & Hospitality**-Arts, Entertainment & Recreation	310	\$13,800	\$4	20
Leisure & Hospitality**-Accommodation & Food Service	2,160	\$20,600	\$44	120
Other Services	610	\$39,800	\$24	100
Public	1,530	\$61,400	\$94	20

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

## **MARLBOROUGH EMPLOYMENT REPORT**

### **NAICS Employment Location Quotients by Sector Marlborough 2009 vs. 2014**

<b>NAICS Sector</b>	<b>2009</b>	<b>2014</b>
Natural Resources & Mining (NRM)	-	-
Construction	0.62	0.93
Manufacturing	2.57	2.06
TTU*-Utilities	0.14	0.13
TTU*-Wholesale Trade	2.39	1.94
TTU*-Retail Trade	1.09	1.09
TTU*-Transportation & Warehousing	0.25	0.29
Information	1.94	1.11
Financial Activities*-Finance & Insurance	0.61	1.12
Financial Activities*-Real Estate & Rental & Leasing	0.45	0.73
PBS*-Professional/ Scientific/Technical	1.83	1.73
PBS*-Management of Companies	0.81	2.12
PBS*-Administrative & Waste Services	0.92	1.51
Ed & Health*-Educational Services	0.13	0.18
Ed & Health*-Health Care & Social Assistance	0.53	0.54
Leisure & Hospitality*-Arts, Entertainment & Recreation	0.66	0.68
Leisure & Hospitality*-Accommodation & Food Service	0.88	0.88
Other Services	0.49	0.63
Public	0.46	0.42

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

## **MARLBOROUGH EMPLOYMENT REPORT**

### **NAICS Net Changes by Sector for Employment, Payroll Marlborough**

<b>NAICS Sector</b>	<b>Employment Absolute*</b>	<b>Employment % Change*</b>	<b>Payroll Abs.* (Millions)</b>	<b>Payroll % Change*</b>
Natural Resources & Mining (NRM)	-	-	-	-
Construction	390	61%	\$36	86%
Manufacturing	-1,720	-28 %	-\$194	-26%
TTU**-Utilities	-1	-8%	\$0.5	37%
TTU**-Wholesale Trade	-740	-27%	-\$52	-23%
TTU**-Retail Trade	-90	-3%	\$6	7%
TTU**-Transportation & Warehousing	30	21%	\$2	31%
Information	-700	-47%	-\$35	-25%
Financial Activities**- Finance & Insurance	620	65%	\$242	407%
Financial Activities**- Real Estate & Rental & Leasing	100	61%	\$8	93%
PBS**-Professional/Scientific/Technical	-60	-1%	\$36	7%
PBS**-Management of Companies	710	162%	\$136	298%
PBS**-Administrative & Waste Services	960	76%	\$31	53%
Ed & Health**- Educational Services	50	34%	\$3	60%
Ed & Health**- Health Care & Social Assistance	300	12%	\$22	25%
Leisure & Hospitality**- Arts, Entertainment & Recreation	30	9%	\$0.3	8%
Leisure & Hospitality**- Accommodation & Food Service	110	5%	\$6	16%
Other Services	30	6%	\$8	48%
Public	-210	-12%	\$5	6%

*Sources: MA EOLWD, MERC \*Rounded; based on 2009 vs. 2014 data \*\*5 NAICS supersectors are further subdivided into sectors: TTU (Transportation, Trade & Utilities), Financial Activities, PBS (Professional & Business Services), Ed & Health (Education & Health Services), Leisure & Hospitality.*

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### **NAICS Net Changes by Sector for Avg. Wage, Establishments Marlborough**

<b>NAICS Sector</b>	<b>Avg. Wage Absolute*</b>	<b>Avg. Wage % Change*</b>	<b>Establishments Absolute Chg.</b>	<b>Establishments % Change*</b>
Natural Resources & Mining (NRM)	-	-	-	-
Construction	\$10,300	16%	15	14%
Manufacturing	\$3,700	3%	3	4%
TTU**-Utilities	\$46,100	49%	-1	-33%
TTU**-Wholesale Trade	\$3,400	4%	-7	-5%
TTU**-Retail Trade	\$2,500	10%	2	1%
TTU**-Transportation & Warehousing	\$3,100	9%	-6	-23%
Information	\$36,400	39%	-7	-13%
Financial Activities**- Finance & Insurance	\$128,500	208%	11	19%
Financial Activities**- Real Estate & Rental & Leasing	\$10,100	20%	5	11%
PBS**-Professional/Scientific/Technical	\$10,400	8%	19	8%
PBS**-Management of Companies	\$54,100	52%	7	58%
PBS**-Administrative & Waste Services	-\$6,000	-13%	18	24%
Ed & Health**- Educational Services	\$7,100	19%	-2	-13%
Ed & Health**- Health Care & Social Assistance	\$4,100	11%	77	76%
Leisure & Hospitality**- Arts, Entertainment & Recreation	-\$29	-0.2%	2	12%
Leisure & Hospitality**- Accommodation & Food Service	\$2,000	11%	-2	-2%
Other Services	\$11,400	40%	-30	-23%
Public	\$10,400	20%	4	22%

*Sources: MA EOLWD, MERC \*Rounded; based on 2009 vs. 2014 data \*\*5 NAICS supersectors are further subdivided into sectors: TTU (Transportation, Trade & Utilities), Financial Activities, PBS (Professional & Business Services), Ed & Health (Education & Health Services), Leisure & Hospitality.*

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## **APPENDIX**

### **North American Industry Classification System (NAICS)**

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

### **NAICS Supersectors\***

#### **Goods-Producing Domain (GPD)**

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

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

##### **Construction Supersector**

- 23 Construction

##### **Manufacturing Supersector**

- 31-33 Manufacturing

#### **Service Producing Domain (SPD)**

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

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

##### **Information Supersector**

- 51 Information

##### **Financial Activities Supersector**

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

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

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

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

- 61 Educational Services
- 62 Health Care and Social Assistance

##### **Leisure and Hospitality Supersector**

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

##### **Other Services Supersector**

- 81 Other Services (except Public Administration)

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

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## **NAICS Sectors**

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

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

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

### **Construction Supersector:**

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

### **Manufacturing Supersector:**

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

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

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

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

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

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

### **Information Supersector:**

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

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## **Financial Activities Supersector:**

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

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

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

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

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

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

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

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

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

## **Leisure and Hospitality Supersector:**

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

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

## **Other Services Supersector:**

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

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

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

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



# ***MARLBOROUGH EMPLOYMENT REPORT***

## **SOURCES**

- United States Bureau of Labor Statistics, U. S. Department of Labor (BLS)
- Massachusetts Executive Office of Labor and Workforce Development (MA EOLWD), ES-202 Series
- MetroWest Economic Research Center (MERC), Framingham State University
- United States Census Bureau, U. S. Department of Commerce (US CENSUS), American Community Survey 2014 (1 year estimates)

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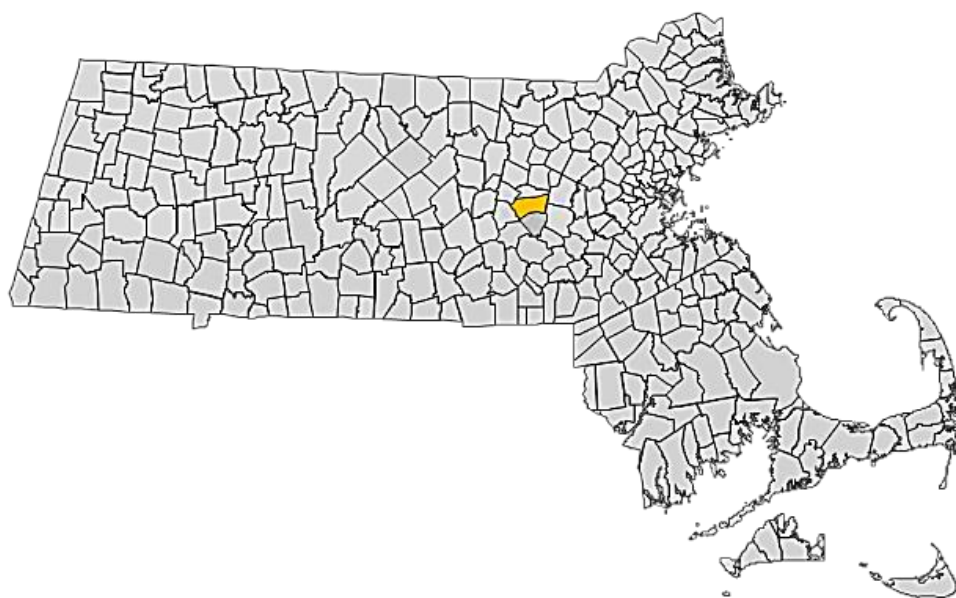
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