

Impact MetroWest Regional Overview

Summary of Key Trends

January, 2020

Prepared for:

The Foundation for MetroWest

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Acknowledgements

CGR thanks the Foundation for MetroWest for the opportunity to work on this study, especially Chief Operating Officer Jay Kim and Director of Programs Caroline Murphy, for their assistance and insights throughout the project.

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Introduction

The Foundation for MetroWest engaged the Center for Governmental Research (CGR) in December 2018 to develop a community indicators website and conduct a stakeholder engagement process for the MetroWest region of Massachusetts. Both efforts were intended to inform community efforts and grantmaking, while also building a strong resource for donors, nonprofits and community members to better understand the region's strengths and challenges, and to create solutions.

The website compiles 50 indicators and analysis to help community leaders and the public use quantitative data to better understand their region. The engagement process is an important qualitative complement to the website, providing nuance, context and themes that are difficult to capture with numbers and statistics alone. A companion report to this one, *Impact MetroWest – Stakeholder Perspectives*, summarizes the themes from that community engagement process.

ImpactMetroWest.org will launch publicly in January 2020. Indicator categories for the website include Children & Families, Community Life, Demographics & Diversity, Economy & Workforce, Education and Financial Security.

Regional Overview of Key Trends

A Seeming Land of Plenty, where Some Struggle to Thrive

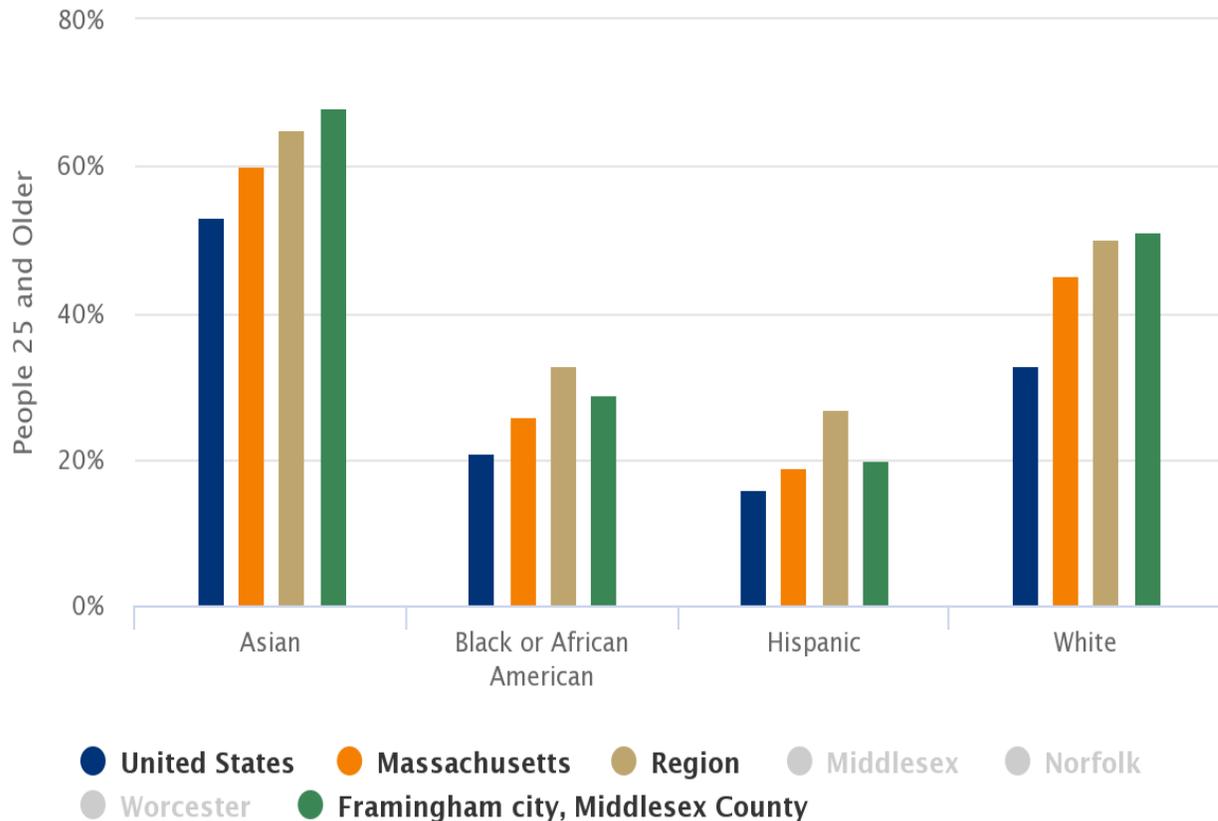
The data available from national and state sources show that the MetroWest region is in many ways a thriving, high-tech sector with an extremely well-educated workforce, growing diversity and much wealth. But the region's residents also face increasing pressures to live comfortably, including a lack of affordable housing, few options for getting around if you don't have a car, and rising income inequality.

MetroWest is experiencing similar trends as the rest of the United States, including racial disparity and the consequences of the opioid drug epidemic. But some of the region's statistics are striking:

- Housing affordability is a bigger challenge: the ratio of median home value to median income in the region is 4.5, 28% higher than the nation's 3.4. In Framingham, where poverty is higher, the ratio is even worse at 4.9.
- Opioid-related overdoses have grown from 235 in 2007 to nearly 800 in 2018, though that was down from more than 850 in 2016.

- The region's workforce is extremely well-educated, with 50% of adults having at least a, up from 39% in 2000 and far above the national rate of 31%. However, those rates are much lower among people of color, 33% for African American residents of the region and 27% of Hispanic residents, reflecting the disparities in educational opportunity that are widespread in our country.

Education Levels of Adults, by Race/Ethnicity



Demographics & Diversity

The MetroWest region is home to more than 3 million residents, with small but fast-growing minority groups, a high proportion of foreign-born residents in some local areas, and an overall aging population. Demographic trends are important to understand because they impact the economy, health care needs and outcomes, what services government and nonprofits provide, and many other local and national concerns.

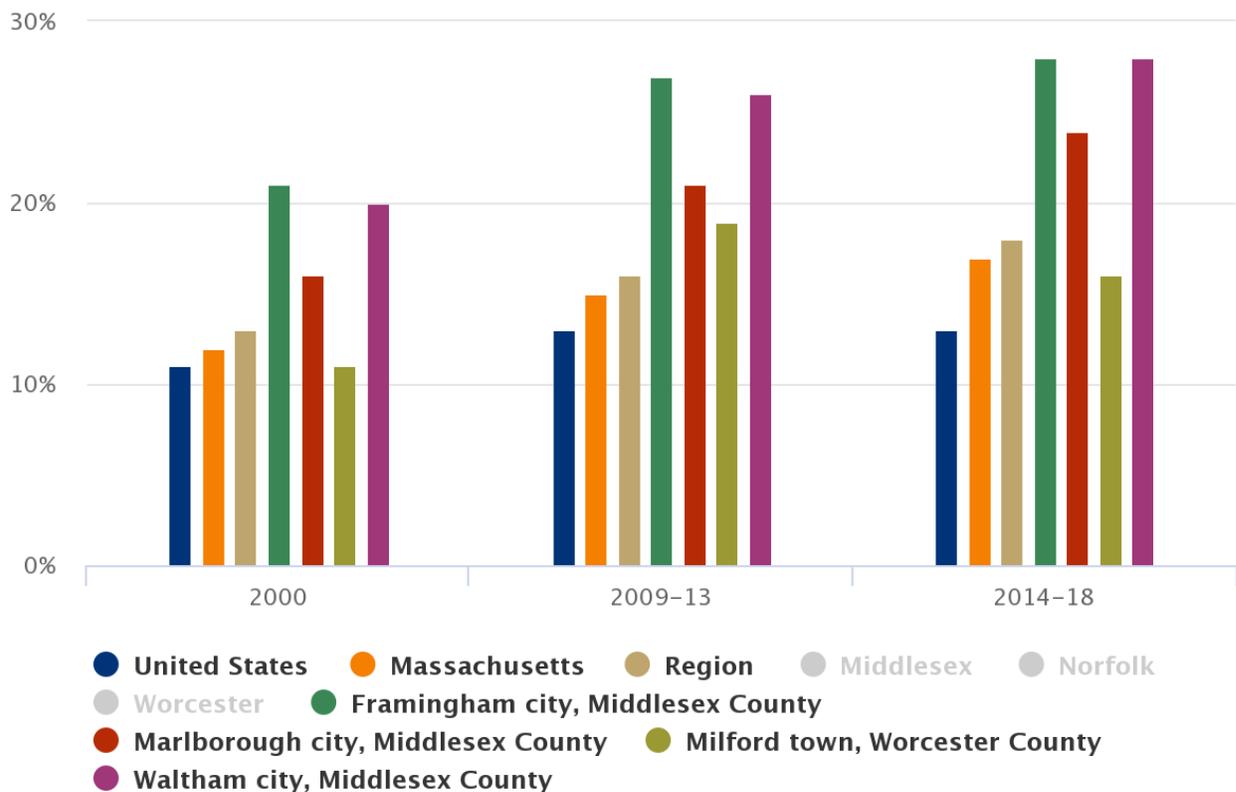
"MetroWest" is not a formal set of government boundaries, but a name adopted for a set of communities lying west of Boston. Different groups have their own definitions of what is included, but our definition of MetroWest encompasses 39 cities and towns: Acton, Ashland, Bedford, Bellingham, Boxborough, Carlisle, Concord, Dedham, Dover,

Framingham, Franklin, Groton, Harvard, Holliston, Hopkinton, Hudson, Lexington, Lincoln, Littleton, Marlborough, Maynard, Medfield, Medway, Milford, Millis, Natick, Needham, Sherborn, Southborough, Stow, Sudbury, Walpole, Waltham, Wayland, Wellesley, Westborough, Westford, Weston, and Westwood.

Though Framingham, with 73,000 people, and Waltham, with 63,000, are the largest localities in MetroWest, they are not the fastest growing: Hopkinton, Boxborough and Littleton all grew more than 25% between 2000 and 2018.

Waltham, Framingham, Lexington and Westborough are all centers of diversity and immigration, with foreign-born residents making up between 27-28% of the population. Immigration is a driver of population growth and the diversity of these communities likely reflects a welcoming climate while also pointing to the need to continue to engage diverse populations in local government and decision-making.

Share of Residents who are Foreign-Born



The region's population overall has grown 10% since 2000, similar to the state but below the national rate of growth (16%). Growth was fastest among Asian residents (105%), African Americans (95%) and Hispanics (92%), though the region as a whole

remained majority white (78%). Overall, 18% of the region's population was foreign-born and 23% spoke a foreign language at home – both a bit higher than state and national rates and up since 2000.

Like the state and nation, the region's population is aging, with the fastest growing group being people ages 60-84. This group increased in size by 37% from 2000 to 2014-18, illustrating the need for robust social and health related support services for aging residents to live in their homes or have access to affordable alternatives and care. The population between 20 and 39 has increased by 7% nationally, but decreased by 1% in MetroWest. The percentage of residents over 65 living alone is 39%, consistent with state and national rates.

Economy & Workforce

MetroWest appears to have recovered well from the 2008-09 recession. The unemployment rate in MetroWest was 3.0% in 2018 – compared to state and national rates of 3.3% and 3.9%, respectively. This was a continuation of the steady decline seen in unemployment rates since the peak rate of 7.5% in 2009 and 2010. This rate is still 0.7 percentage point higher than it was in 2000, however.

Share of Jobs Considered High-Tech



Notably, MetroWest is doing well as a regional center of high-tech jobs. High-tech jobs are not only seen as the future of employment, but tend to command higher salaries and benefits. In 2018, 19% of jobs in the region were considered high-tech, clearly higher than both the state (14%) and national (10%) rates. Middlesex is home to the majority of these jobs.

The share of jobs by sector is a key indicator of the structure of the economy in a region. The largest sectors in MetroWest in 2018 were Professional and Business Services, with 20% of jobs, followed by Trade, Transportation and Utilities (16%), Health Care and Social Assistance (12%), Financial Activities (10%), and Leisure and Hospitality and Government, both at about 8.5%. Compared to the state as a whole and the nation, MetroWest has a higher proportion of jobs in Professional and Business Services and a lower proportion in Leisure and Hospitality and in Government. In other sectors, MetroWest is similar to Massachusetts as a whole.

Among large sectors, MetroWest has seen the greatest growth in the Financial Activities (49%), Healthcare and Social Assistance (46%) and Leisure and Hospitality (45%) sectors.

The biggest decline among major sectors was in Manufacturing, where jobs fell 34%. Some smaller sectors had large gains or declines: Agriculture, with 0.2% of total jobs, grew 27% since 2001, and Education, with 6% of all jobs, grew 32%. Trends in MetroWest were very similar to statewide and national trends.

Yearly salaries in MetroWest averaged \$75,000 in 2018. The highest-paid sectors in the region were Information (\$135,000), Professional and Business Services (\$115,000), Manufacturing (\$99,000), and Financial Activities (\$100,000). The lowest-paid sector was Leisure and Hospitality (\$26,000). This was similar to the state and nation, where the Financial Activities and Information sectors were the two highest earning sectors.

In MetroWest, as in the state and nation, women's earnings tended to lag men's earnings. In 2014-18, women in the MetroWest region earned 65 cents for every dollar earned by men (a female to male earnings ratio of 0.65). This ratio was up 12% from 58 cents in 2000.

Financial Security

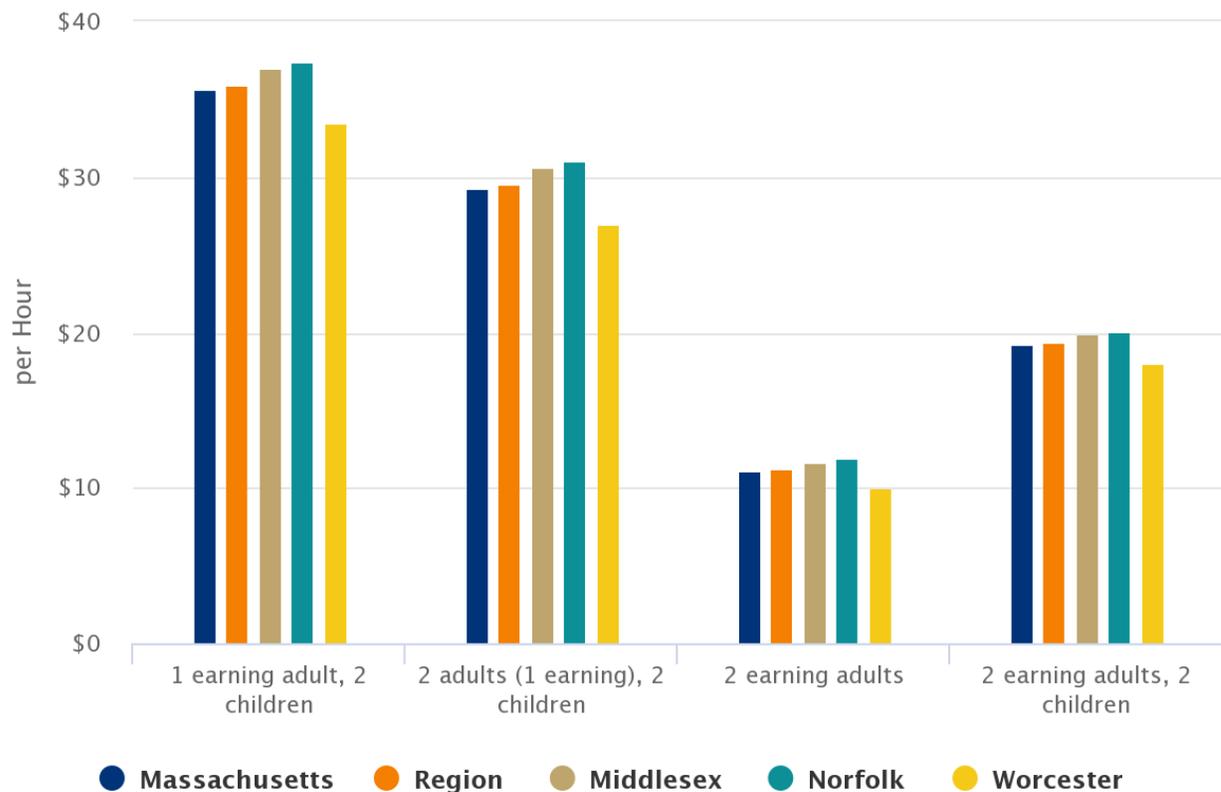
While in many ways, MetroWest is a high-income region with much wealth, people in areas throughout the region struggle to make ends meet. The high cost of living, extremely expensive housing and myriad difficulties with transportation combine to put a financially secure lifestyle out of reach for many residents of MetroWest.

While the region's overall poverty rate of 8% is below the state and nation, rates are higher in both Framingham (10%) and Waltham (11%) and rates are higher among Hispanic (22%) and African American (16%) residents. Education matters: while 21% of residents without a high school diploma had incomes at or below the poverty level, just 4% of those with at least a bachelor's degree did.

And others living above the poverty threshold struggle to make ends meet. While the overall median household income in MetroWest was \$89,000 in 2014-18, median incomes for Hispanic and African American households were substantially lower at \$52,000 and \$59,000.

A living wage in MetroWest requires \$78,600 for a family of four with two earners or \$73,000 for a family of three with one earner, certainly out of reach for many of our residents.

Living Wage Hourly Rates, by Varying Family Types



Federal food assistance is needed at a high level among some populations. In 2014-18, 26% of Hispanic residents and 20% of African Americans participated in the federal SNAP program, higher than Asian (9%) and white (7%) residents.

And people of color in MetroWest (as well as the state and nation) have less access to financial services. Unbanked or underbanked rates in the three MetroWest counties are roughly 30-40% among Hispanic and African Americans.

Homeownership is an important factor for neighborhood stability and civic participation and, in 2014-18, the homeownership rate in the MetroWest region was 65%, exceeding both the state and national rates. However, while rates were 68% among whites and 58% among Asians, they were 35% for African Americans and 31% for Hispanics.

Owning a home is simply out of reach for many residents of MetroWest. The ratio of home value to median income was 4.5 in 2014-18, well above the 2-3 range considered affordable. It is even higher in some communities, including Lincoln and Weston, where the ratio was 7.1 and 6.7, respectively. Rent, too, is unaffordable in some communities, including Walpole, Holliston & Needham, which all had rates over 40%, above the 30% considered affordable.

Homelessness is a growing concern in MetroWest. While the rate has declined a bit from a high in 2014, it was up 45% since 2007, with 6,200 homeless people counted during the annual tally in January in 2018.

Children & Families

More children in the MetroWest region are living in poverty, compared to 2000, with rates especially high among children of color and in some local areas. While as a whole MetroWest children are in some ways better off than the children across the state and nation, the data show that there are deep racial and ethnic disparities, which reflect current and historic differences in socioeconomic status and access to resources, as well as public policies with discriminatory or inequitable outcomes. Poverty, domestic violence and single-parent families are all conditions that can impact children's ability to thrive, and in our region, children have different burdens to bear depending in part on where they live.

Socioeconomic status also plays a critical role in shaping a child's future. Children raised in poverty are at higher risk for various health and social problems, including difficulty in school, which can diminish their chances for successful adult lives. In 2014-18, about 60,000 children in MetroWest were living in poverty, or 9% of all children under 18 – up slightly from 8% in 2000. While in some communities in our region very few children are living in poverty, other areas have especially high rates, such as the 13% child poverty rate in Framingham. Across the region, poverty rates were much higher among Hispanic (27%) and African American (21%) children than among white (7%) and Asian (8%) children.

Whether a young person is in school or working also is an indicator of future success. In 2014-18, 4% of MetroWest youth between the ages of 16 and 19 were not in school nor working, similar to the state rate and less than the national rate of 7%.

Children in single-parent families are far more likely to grow up in low-income households than those living with two parents. In 2014-18, 25% of families with children under 18 in the MetroWest region were headed by one parent, well below the national rate of 34% and the statewide rate of 32%. In MetroWest, the share was highest among Black or African American (55%) and Hispanic families (51%), followed by white (29%) and Asian (15%) families. Rates were higher for all racial and ethnic groups at the state level.

A healthy pregnancy is one of the earliest factors that shapes a child's future. Early, high-quality prenatal care can improve chances that pregnancy results in a healthy, full-term baby. In 2018, MetroWest women initiated prenatal care in the first trimester at slightly higher rates than Massachusetts as a whole. Rates varied by race and ethnicity: Prenatal care was initiated in 74% of births to Black or African American mothers, 82% of Hispanic or Latina births, 86% of Asian and 88% of white births. These differences mirrored racial and ethnic disparities at the state and national level. There has been little progress on narrowing these gaps at the regional level since 2012.

Domestic violence has uniquely negative effects on victims and families. Domestic violence has increased from 1.7 reported victims per 1,000 residents in the region in 2000 to 2.7 in 2018, or nearly 8,500 reported victims. The region's 2018 rate was lower than Massachusetts' rate (3.6). The rate was highest in Marlborough (4.8) and lowest in Wayland (0.1) and Weston (0.3). Often, domestic violence still goes unreported.

Community Life

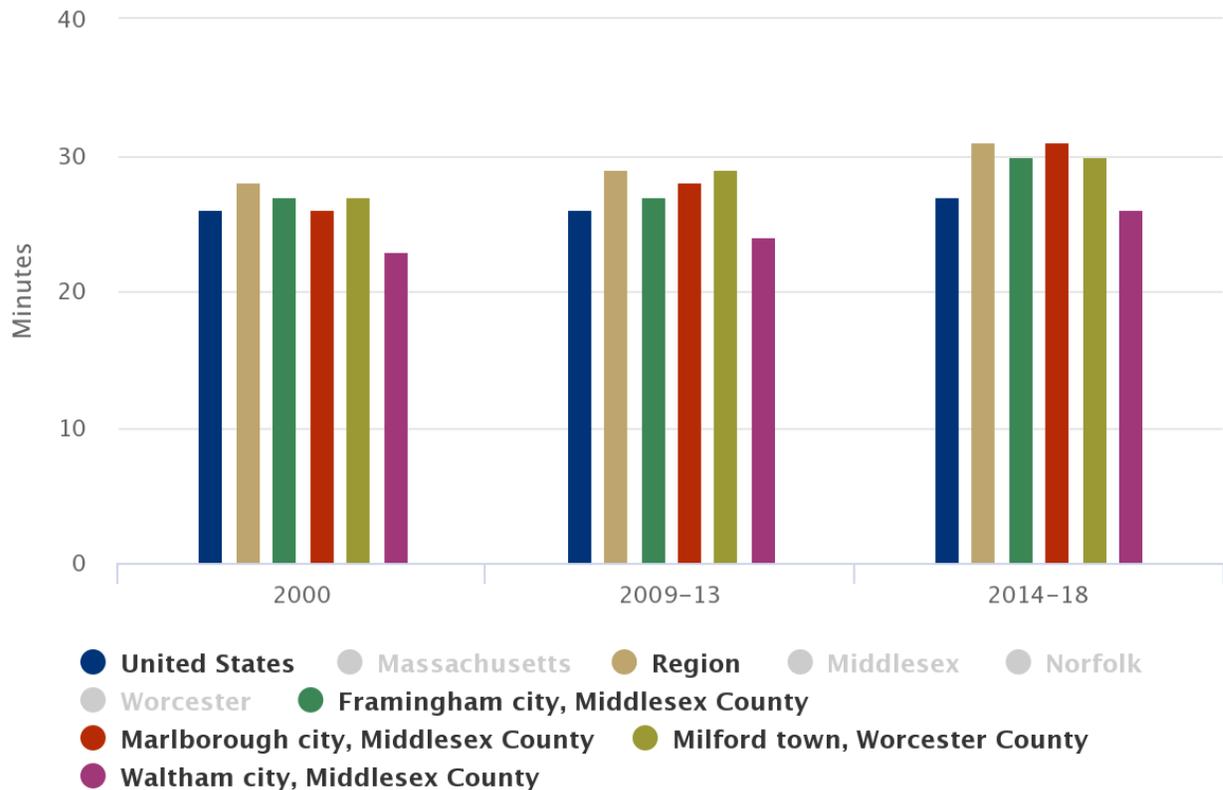
Quality of life encompasses a wide range of attributes – here, we examine factors including the arts, transportation, public safety, and civic engagement. In MetroWest, challenges in these areas include drug addiction and transportation difficulties, while a growing arts sector, protected open spaces and falling crime rates are areas of strength.

Drug-related deaths are not only an individual tragedy, but also profoundly affect surviving relatives and friends. Overdoses in MetroWest have skyrocketed more than 200% since 2007 to a rate of 25 deaths per 100,000 residents in 2018, a bit lower than the state rate of 30.

Getting around MetroWest poses daily challenges for many residents. About 1 in 10 residents in 2014-18 reported having no access to a vehicle, making it difficult to get to work and access a variety of other resources. Commuting to work continues to be

done mainly by car, though the share of residents driving alone to work fell slightly since 2000 to 75% in 2014-18 as public transit, biking and walking all increased slightly. The average travel time to work in the region rose 3 minutes during this period, to 31 minutes, which was slightly higher than the state average. The longest commute times were in Sherborn (40 minutes), Boxborough (39 minutes), and Medfield, Hopkinton, and Holliston (all at 38 minutes), while the shortest was in Waltham (26 minutes).

Average Commutes



Arts and cultural institutions attract visitors and investment, contributing to the vitality of a region. In 2018, MetroWest had somewhat fewer establishments in the Arts, Entertainment and Recreation sector (5.2 per 10,000 residents) than the state as a whole (5.8), but the regional sector has grown since 2000.

Protection of open space preserves valuable habitat and natural resources while providing public access to nature. As of 2013, about 21% of all land in MetroWest was classified as “protected” under the Massachusetts Land Protection Program, slightly less than the state as a whole (25%). The share of protected land in local communities varied widely, ranging from 3% in Milford to 40% in Lincoln.

Today, internet access is a crucial indicator to assess quality of life. In 2014-18, 87% of households in MetroWest had access to the Internet, slightly above the state rate of 85%.

Voting participation and charitable giving are two indicators that speak to levels of civic engagement. In MetroWest, voter participation has increased overall since 2000 in both midterm and presidential elections: 52% of MetroWest voted in the 2018 midterm elections and 64% in the 2016 presidential elections, both slightly higher than the statewide rate. Turnout in MetroWest in 2016 was substantially higher than at the national level (55%).

In 2017, MetroWest residents contributed 2.2% of income, or just under \$4 billion to charity, up 1.8% from 2011 and similar to the statewide rate.

Crime detracts from the quality of life and fortunately it is decreasing in MetroWest. There were 7.3 crimes per 1,000 MetroWest residents in 2018, a bit lower than the statewide rate of 9.1 and down 15% since 2012.

Incarceration rates vary widely across racial and ethnic groups both in MetroWest and throughout the state. In 2015, the incarceration rate for Hispanic or Latino residents in MetroWest was 4 times higher than that of white residents; among African American residents, the rate was 3 times higher than among white residents.

Education

Education is a point of pride for the MetroWest region, which has overall high elementary reading scores and high school graduation rates as well as an extremely well-educated adult population and strong, varied educational institutions including Wellesley College, Bentley University, Framingham State University and Massachusetts Bay Community College.

But the educational benefits of the region do not pertain to all in MetroWest – all educational metrics are lower for economically disadvantaged students and adults of color. The reasons for such disparities are complex and have historical roots, including inequitable access to high quality schools.

Consider:

- Third-grade reading proficiency – which is critical to overall academic success – is at 74% among Asian students, 63% among white students, and just 36% and 34% among black or African American students and Hispanic or Latino students, respectively. In Framingham, just 20% of economically disadvantaged students and

23% of Hispanic or Latino students achieved proficiency, while 50% of students identified as not economically disadvantaged achieved proficiency

- High school graduation rates are 87% among African American students and 80% among Latino students, lower than the rates for Asian students and white students (96% and 94%).
- A fabulous 50% of adults in MetroWest hold at least a bachelor's degree, up from 39% in 2000 and far above the national rate of 31%. Yet much lower shares of people of color have bachelor's or higher degrees: 33% of African American residents of the region and 27% of Hispanic residents.

Prekindergarten helps prepare children both socially and academically for school, and can be especially important in preparing low-income children for kindergarten. In MetroWest in 2018, 53% of 4-year-olds were enrolled in public or private prekindergarten programs, up from 37% in 2002 and about level with the state rate. The vast majority of these children, or 74%, were enrolled in public prekindergarten programs.

School attendance also is critical to students' ability to develop key skills and their future success in school. In 2017, 10% of students were chronically absent in MetroWest, below the state rate (14%). Rates were highest (14%) in Milford, Framingham and Marlborough, and lowest (3%) in Lexington. Absence rates decreased most since 2009 in Waltham (5 percentage points) and Ashland (4 points).