

2018 LMA FACT REPORT



2018 LMA THEMES

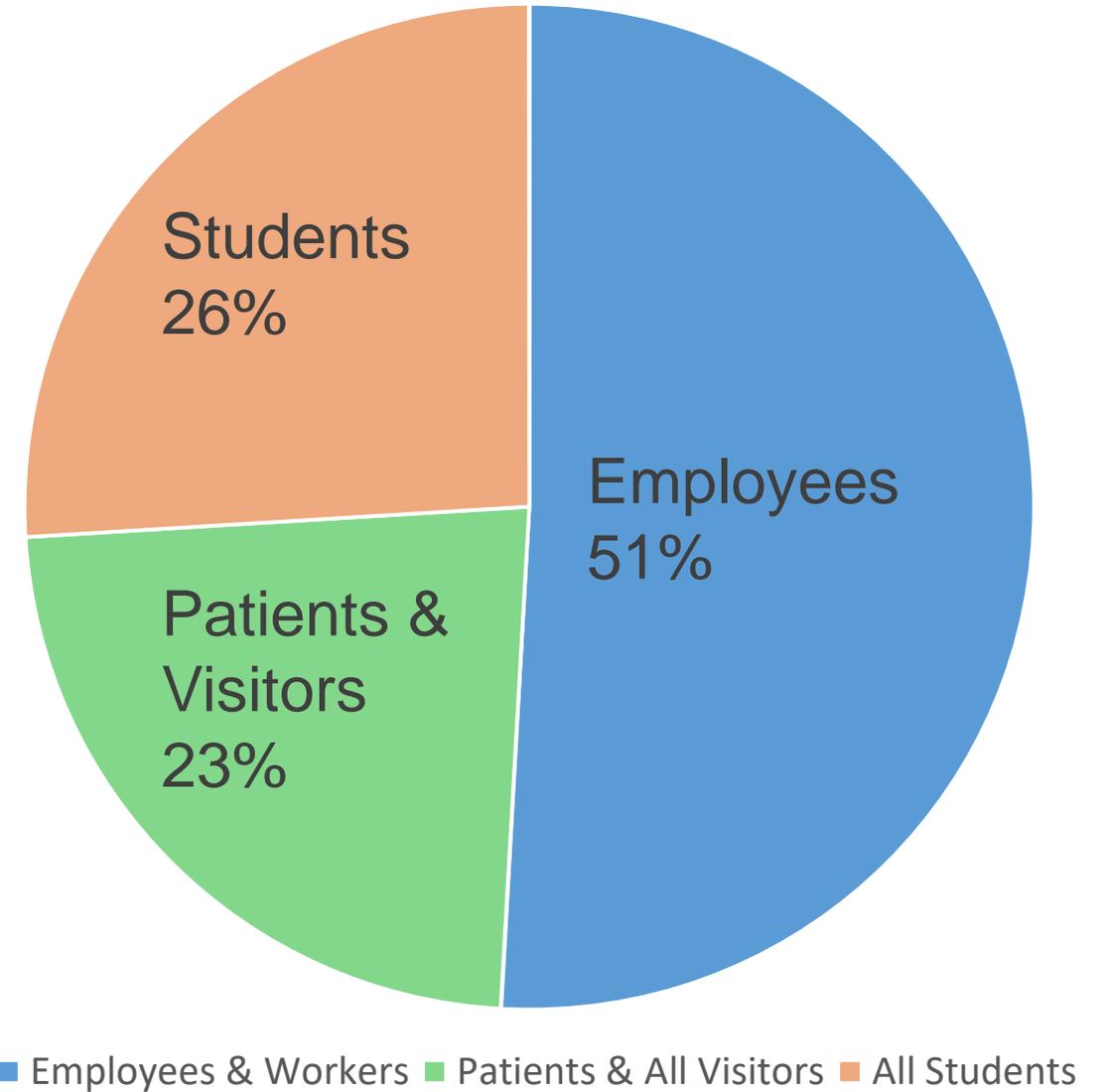
- Workforce Powerhouse for the City and State
- Transformative Growth for the Region
- Epicenter of Innovation and Healthcare
- Students Build the State's Economy
- Community Centered Focus
- Transportation System Remains Virtually the Same

Workforce Powerhouse for the City and State



TOTAL DAILY POPULATION: 112,000

Fills 560 two-car
Green Line Trains

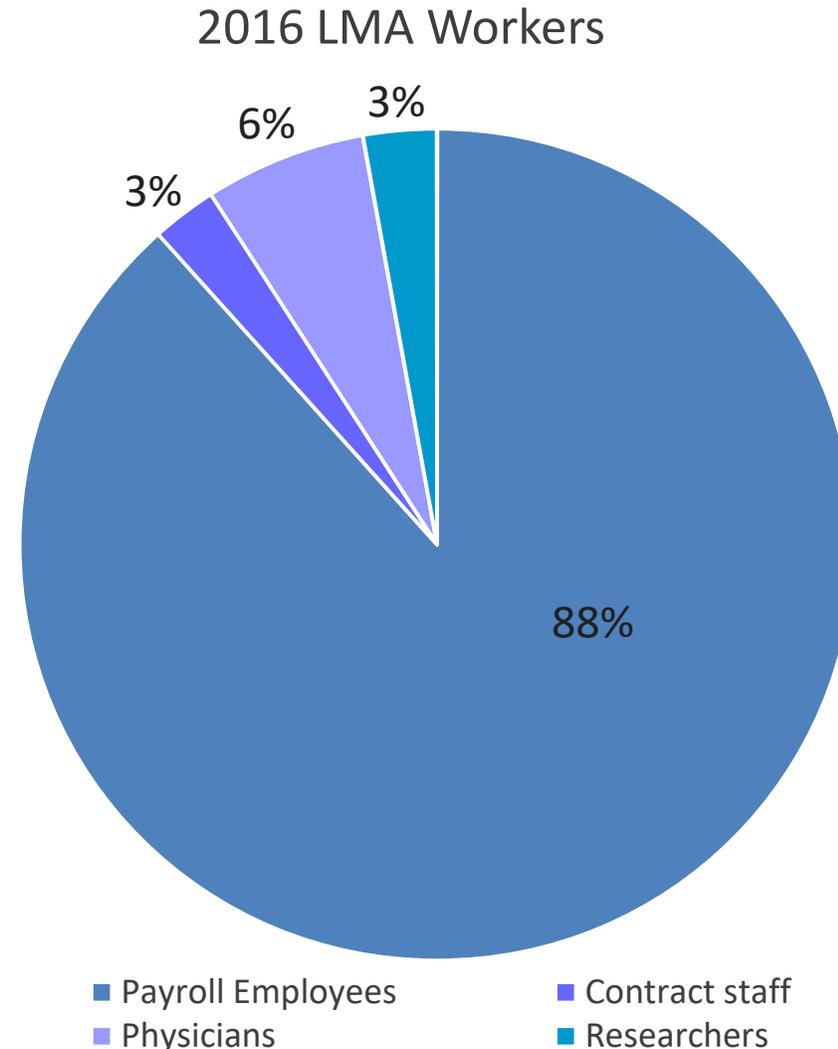


WORKFORCE INCREASES YEARLY – 57,000 WORKERS

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



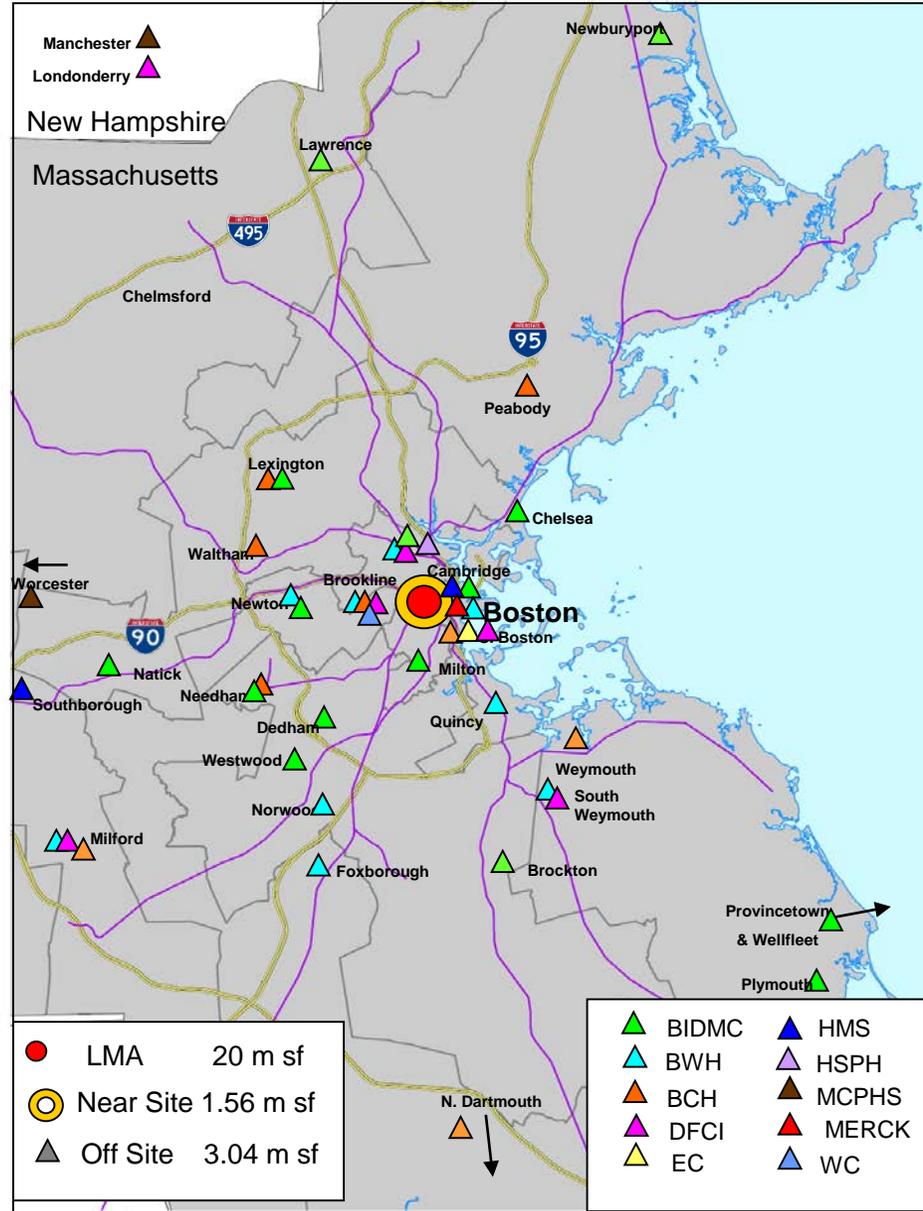
FINANCIAL - \$184M IN STATE TAX REVENUES

- 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
 - Payroll generated ~ \$184m in state tax revenues
 - Including estimated payroll generated through research funding

Transformative Growth for the Region

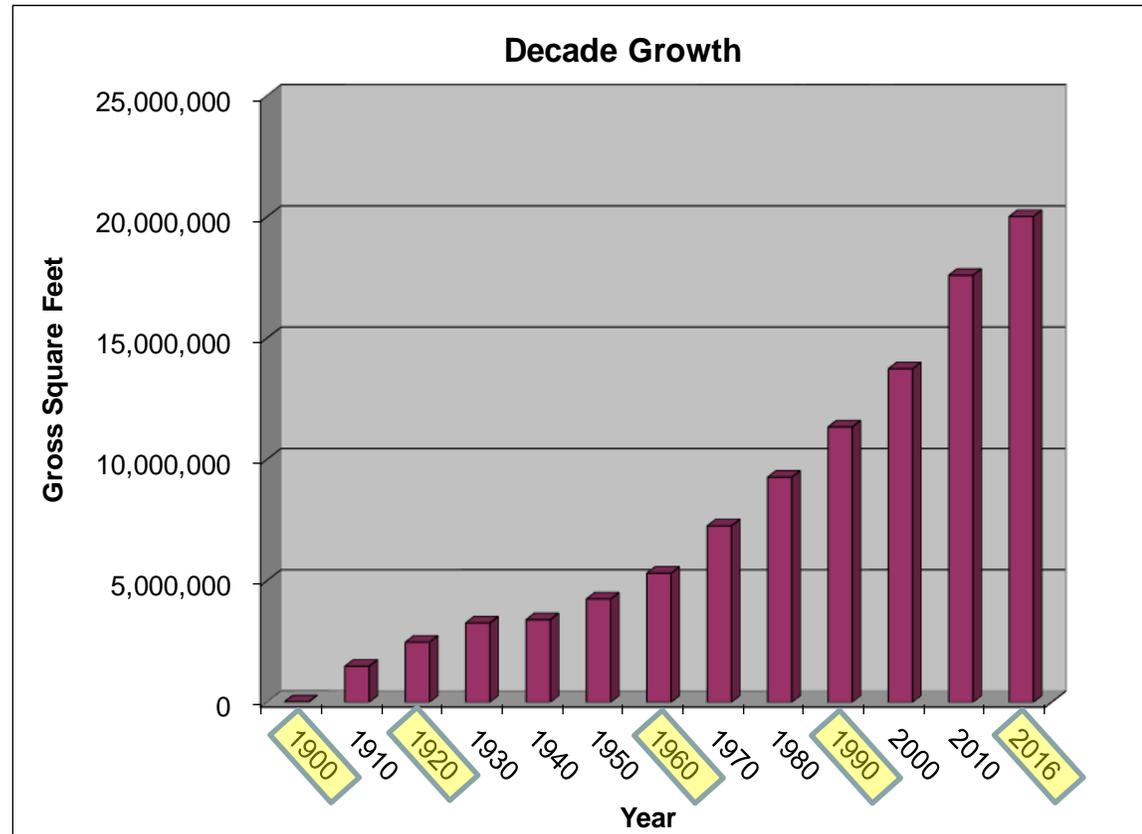


THE LMA IS A REGIONAL POWERHOUSE AT 24.6 MSF



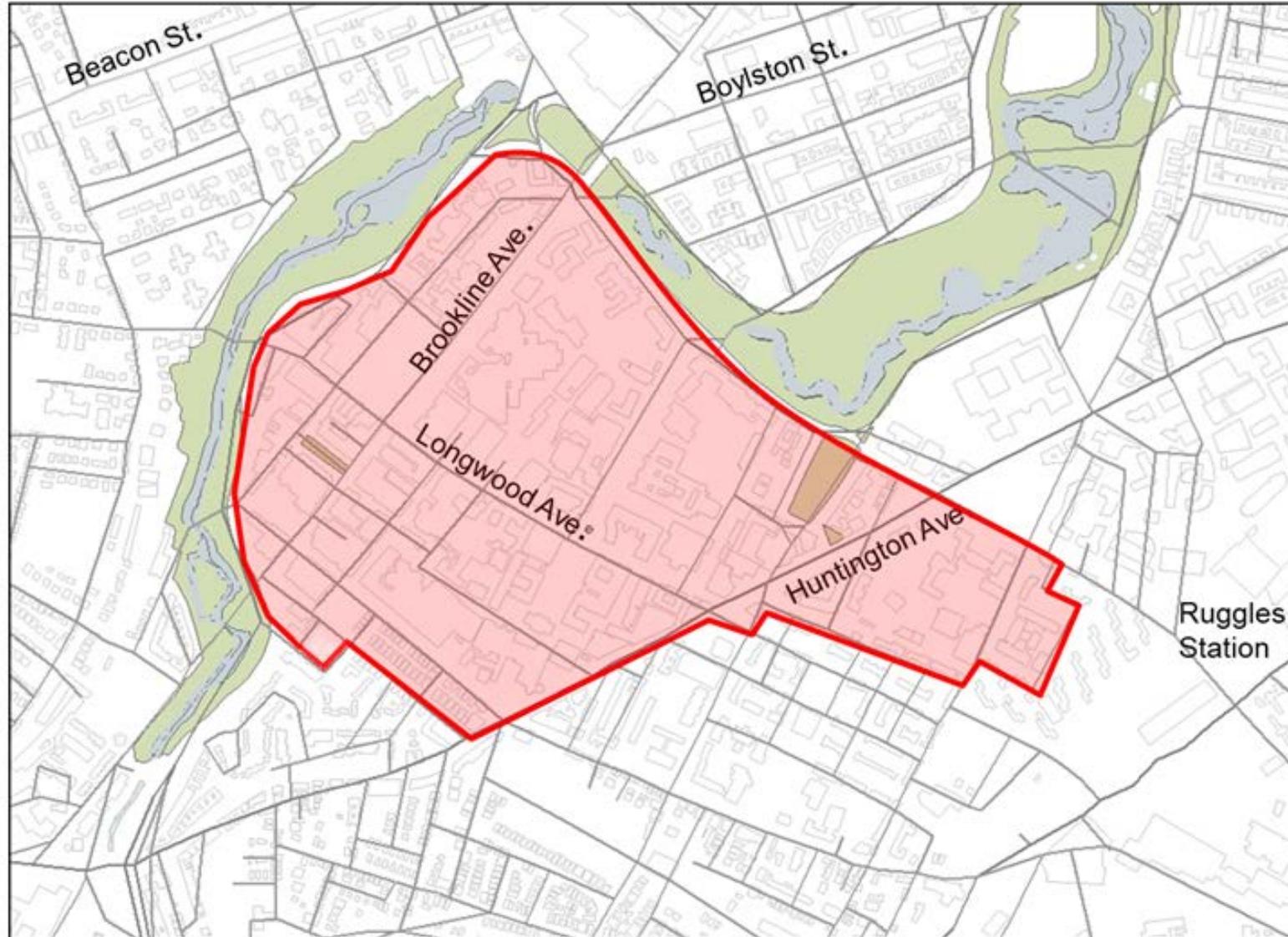
LMA = 20 MILLION SQUARE FEET

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

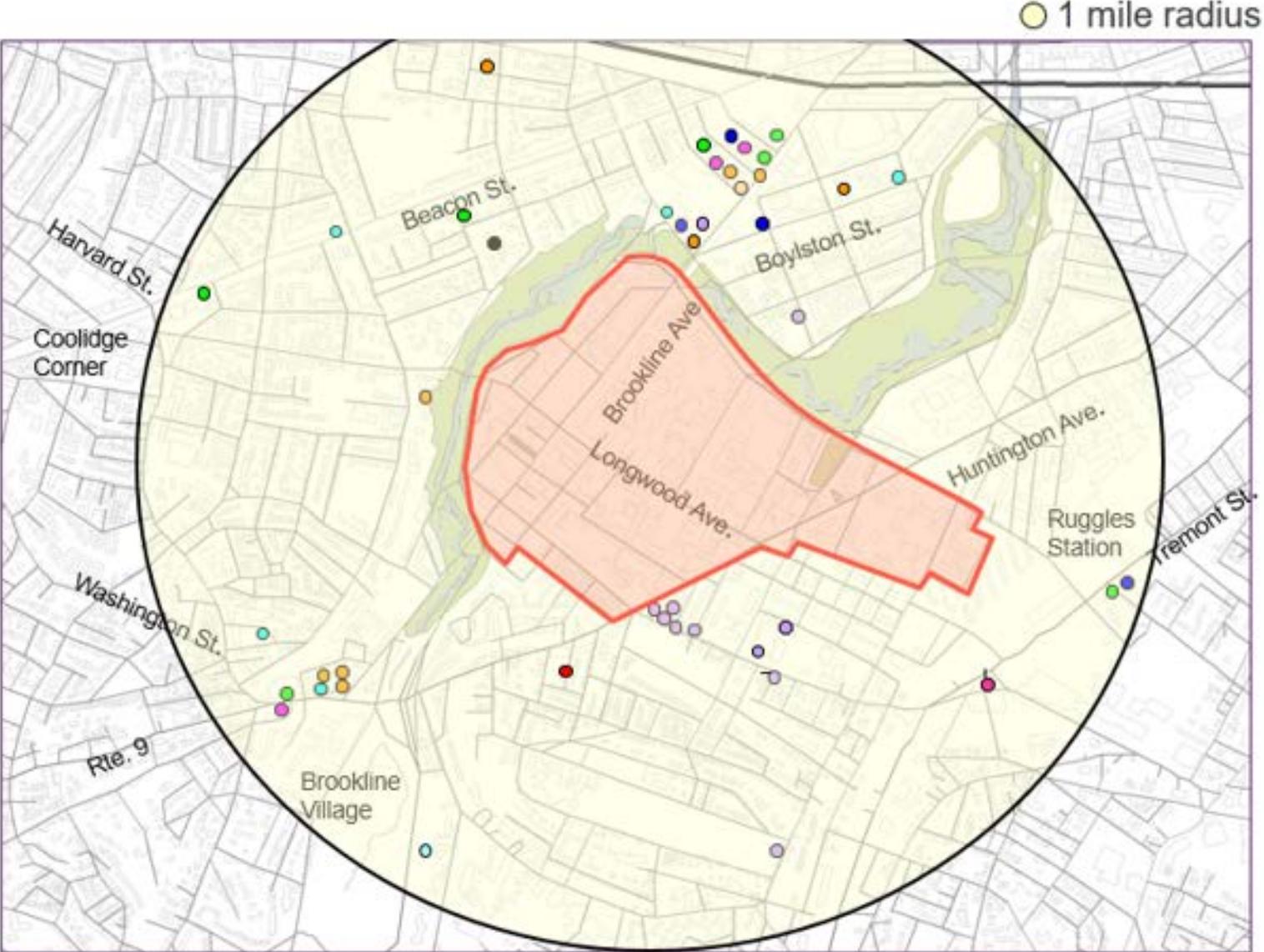


Transportation Infrastructure Still Substantially the Same

ON-SITE: INCREASED BY 6% SINCE 2013



NEAR-SITE: INCREASED 10% to 1.56 MSF



- BIDMC
- BCH
- BWH
- DFCI
- HSPH
- HMS
- JDC
- MEEI
- WC

LMA COMPARABLES - DENSITY

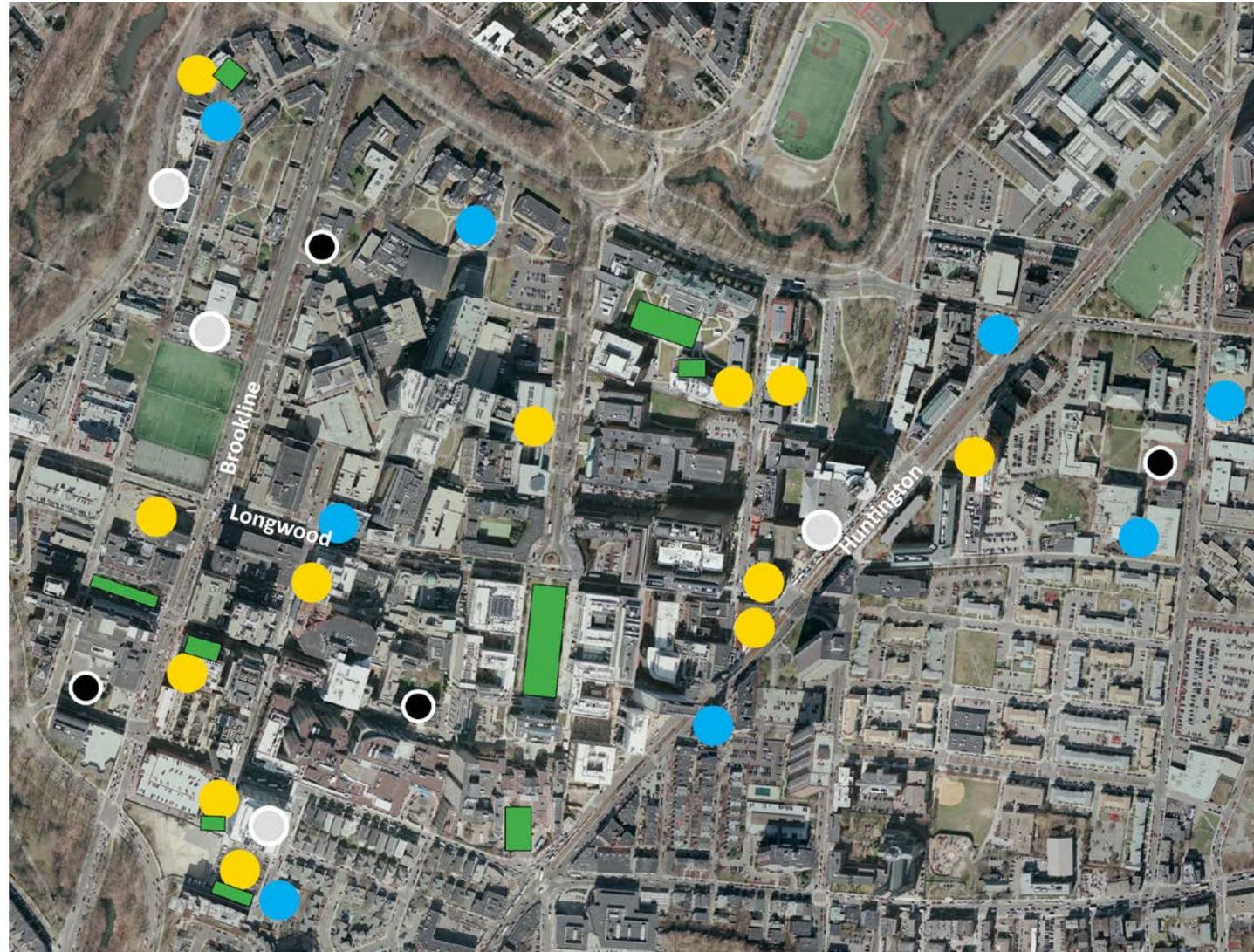


- 32% more people and 36% more development than Kendall Sq. (not including visitors)
- 80% more people than Seaport; same amount of development (with visitors)

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

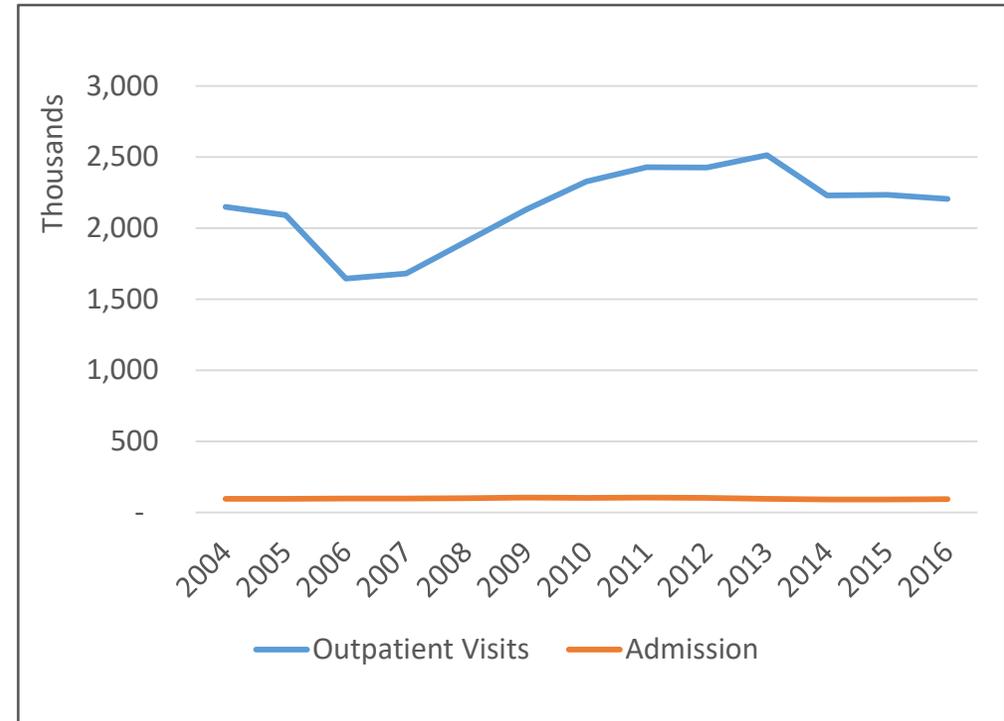
LMA length of stay increased to 6.64

- 1.78 days higher than state avg.

LMA Avg. Occ. Rate reduced 1%

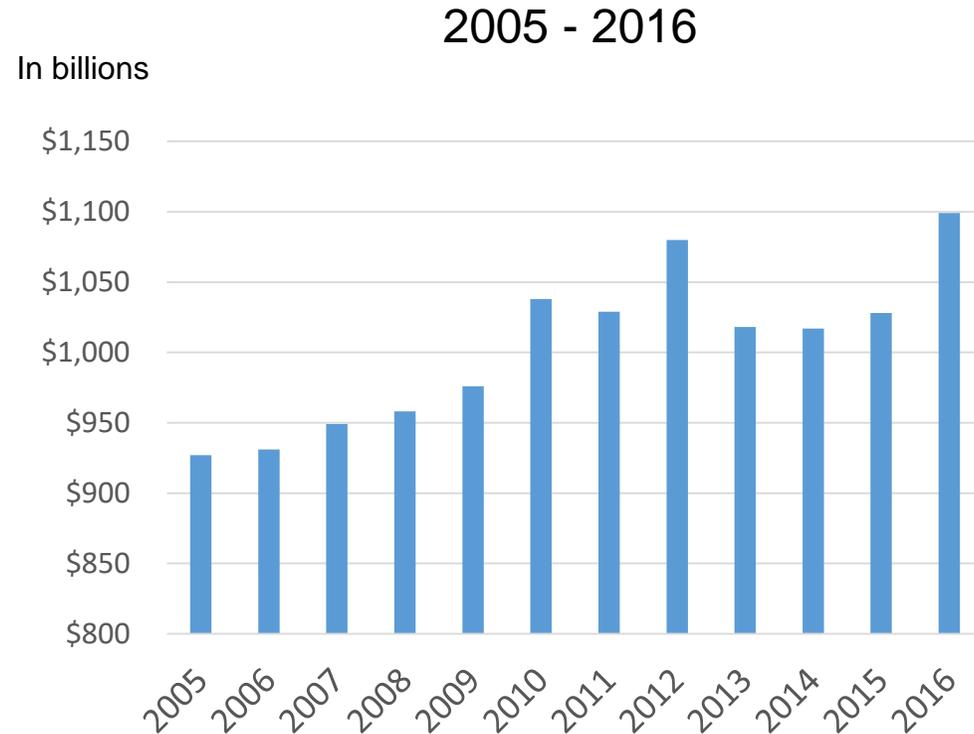
- 12% higher than state avg.

11,689 births



NIH RESEARCH FUNDING INCREASED

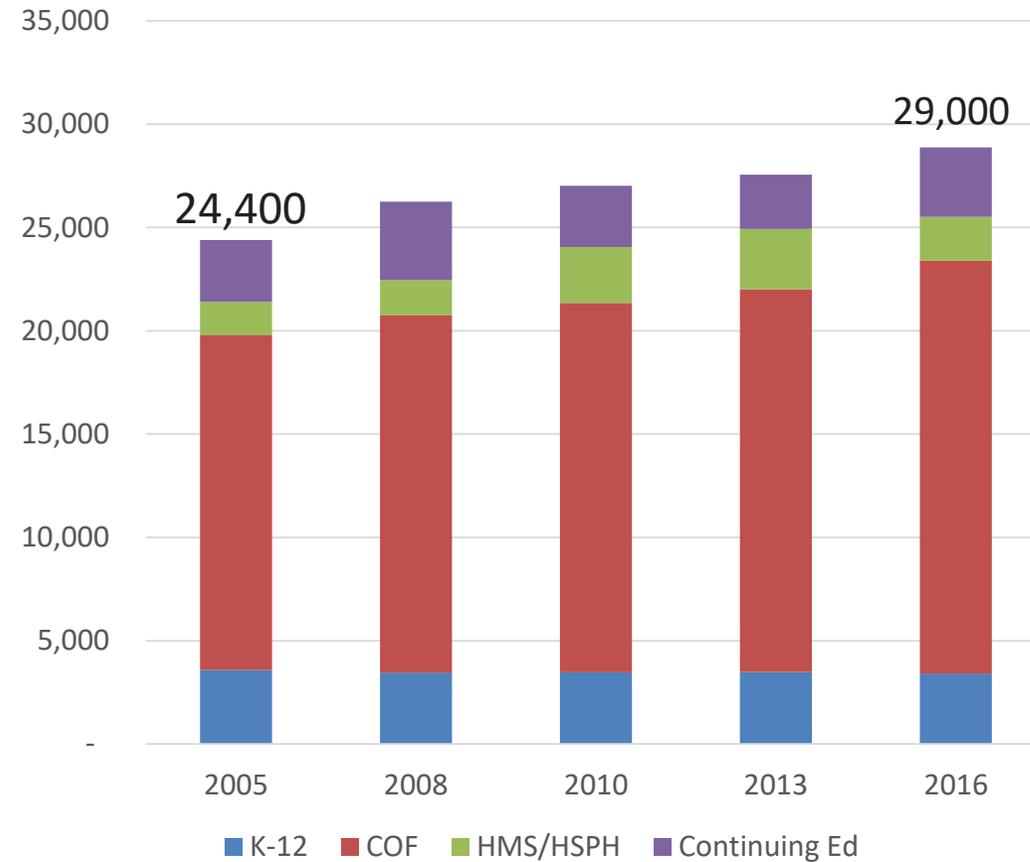
- MA: \$2.57 Billion
 - Increased by 8%
- MA is #2 after CA
- LMA: nearly \$1.1 Billion
 - Increased by 8%
- If LMA were a state it would be #7, after TX, before MD
- Over \$2 billion, when including private, industry and other research funding



Students Build the State's Economy

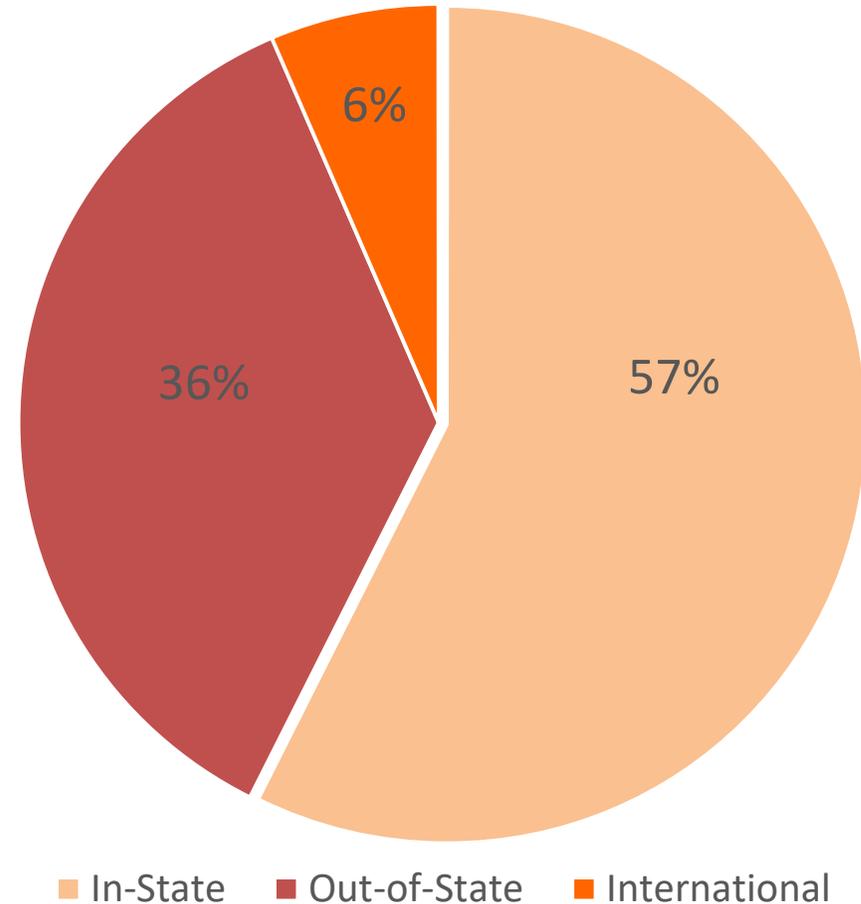
LMA STUDENTS

- 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
 - 64% of Alumni stay in MA
- Over 1/3rd out-of-state
- 6% International



20,000 COLLEGES OF THE FENWAY STUDENTS

- 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



WORKFORCE DEVELOPMENT

- 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

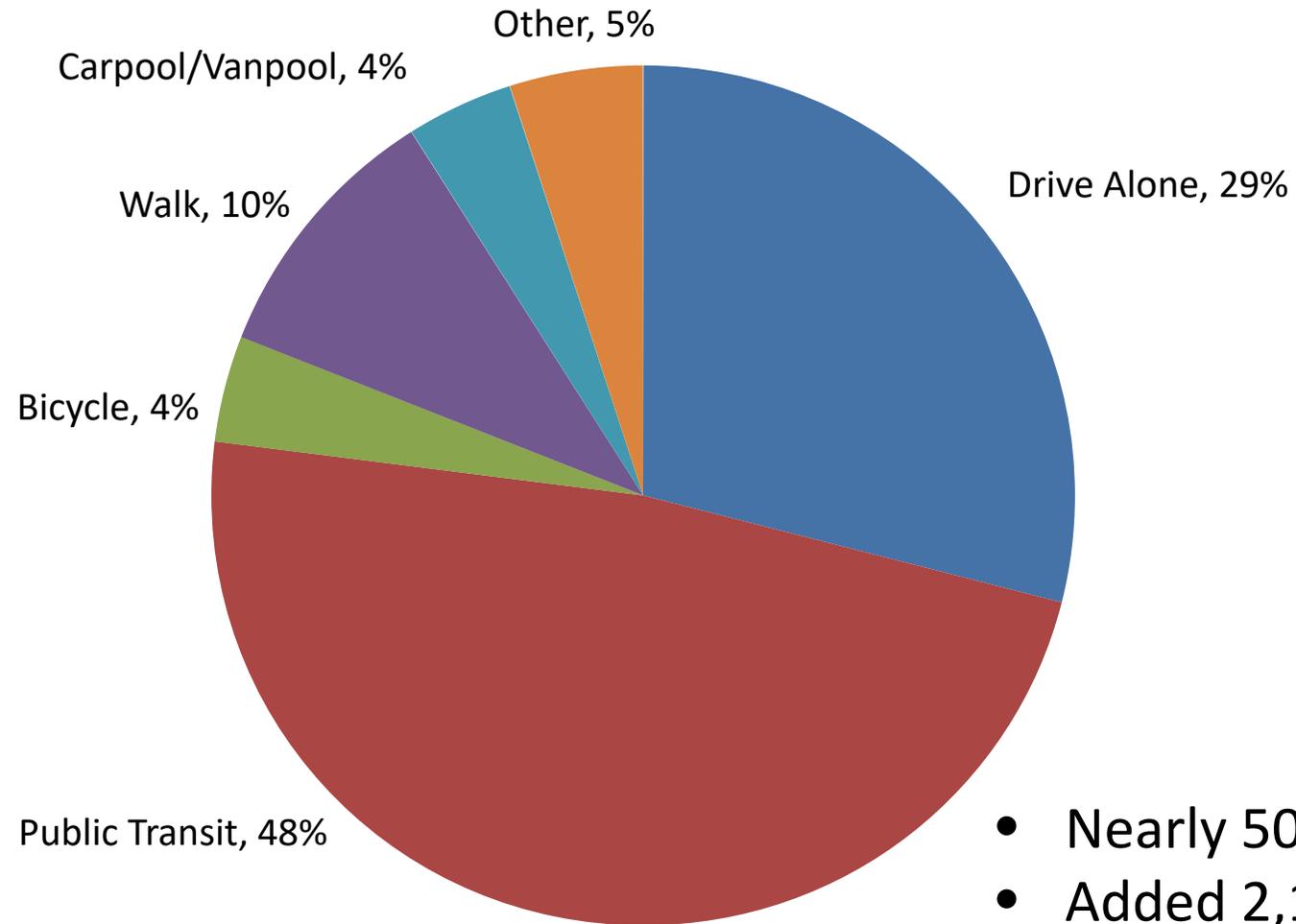
- Nearly \$78m in Net Charity Care, up 5%

*Of which \$9.3m was cash, and nearly \$13m in community benefits credits

Transportation System Remains Virtually the Same



2016 LMA COMMUTING MODE SPLIT

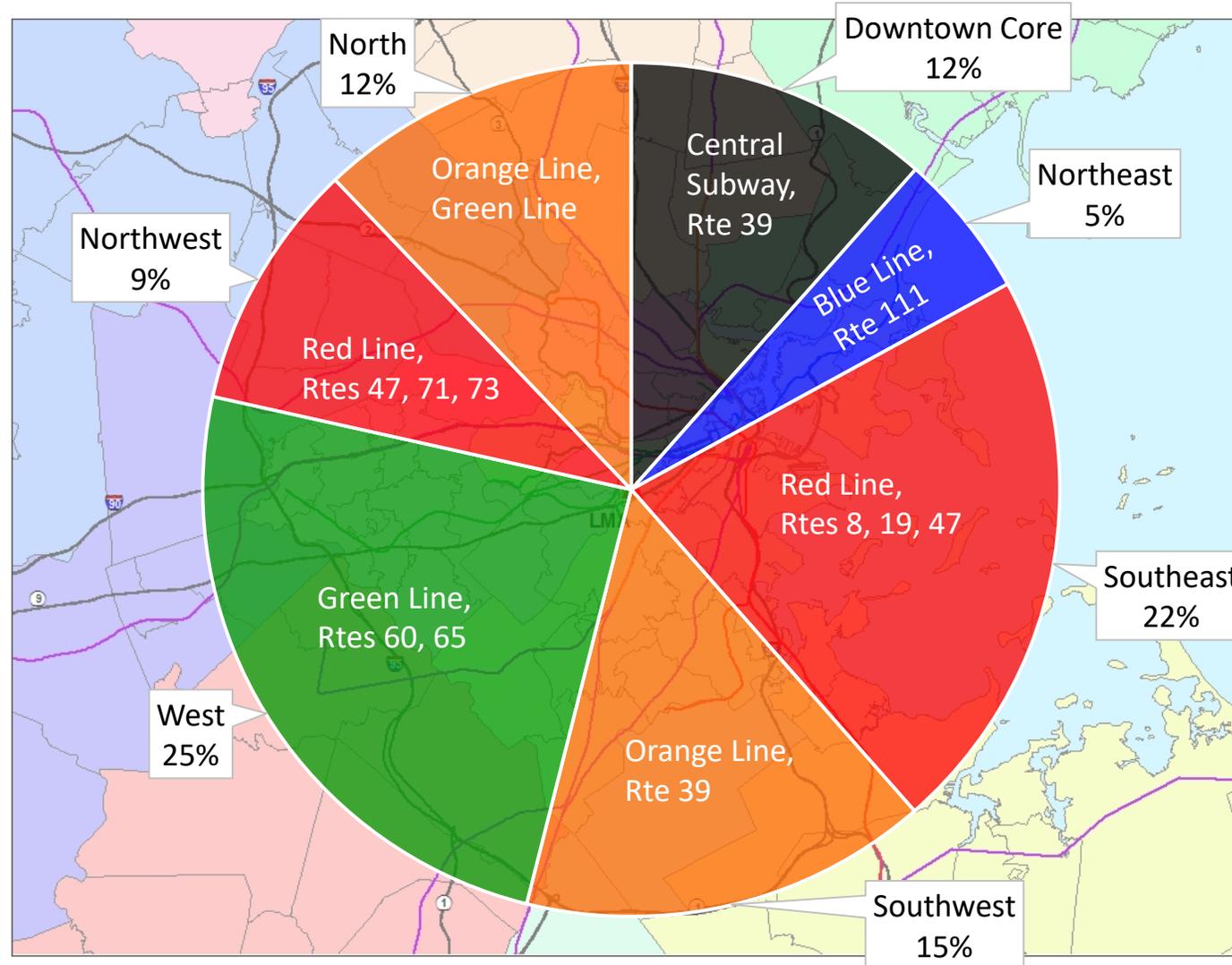


- Nearly 50% take transit
- Added 2,100 employees

INSTITUTIONS INCREASE FINANCIAL SUPPORT OF PUBLIC TRANSPORTATION

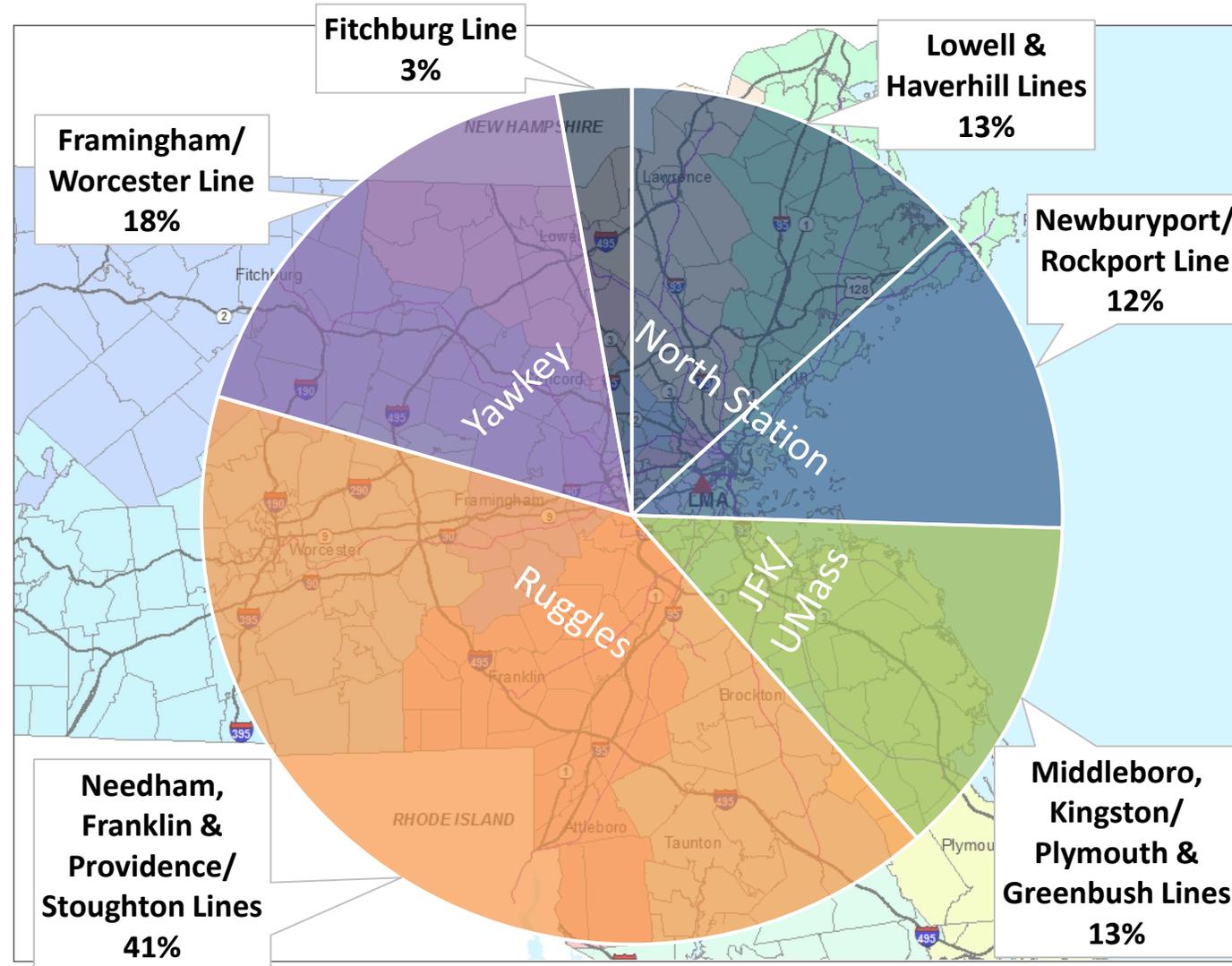
- \$26.9 million in total spending on T-passes (245,900 passes)
 - \$13.7 million by institutions, 24% increase
 - \$13.2 million by employees, 22% increase
 - 10.4% growth in annual T-passes sold (over 2013)
- MBTA service supplemented by \$10.6 million in privately funded transportation
- \$8.5m funding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

DISTRIBUTION OF SUBWAY & BUS RIDERS



37% Come from South, 25% from West

DISTRIBUTION OF COMMUTER RAIL RIDERS



28% come through North Station