



GREATER PHILADELPHIA

BUSINESS IS GREATER HERE



TABLE OF CONTENTS

2 Overview

4 Workforce

6 Innovation & Entrepreneurship

8 Life Sciences

10 Value & Opportunity

12 Transformations

14 Energy

16 Access to Market

18 Technology

20 Livability

22 Connections

24 About Select



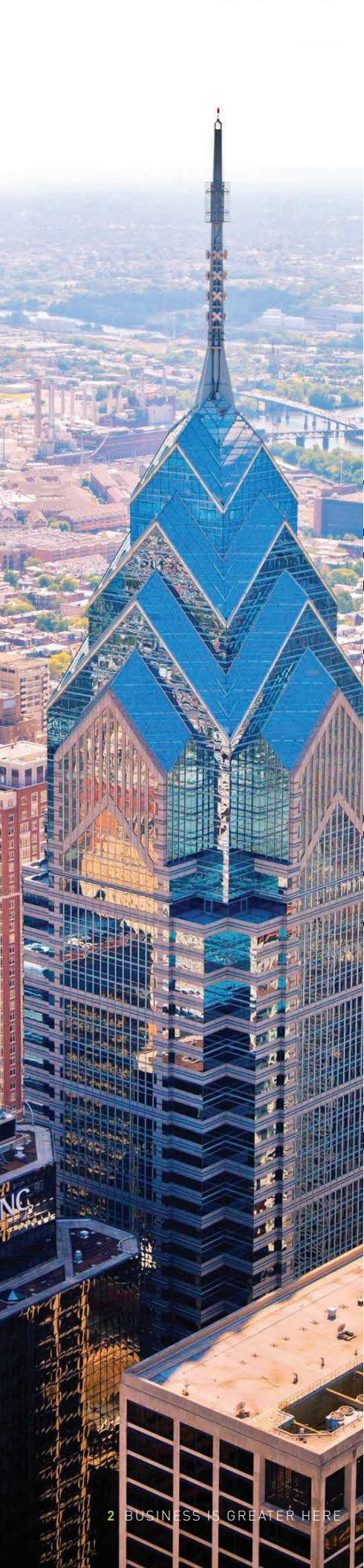
There's something special happening here.

Right here, right now, Greater Philadelphia is exploding with new energy, excitement, and prospects. Our region's business climate is the best it's been in decades, and the outlook – fueled by collaboration, creativity, inclusion, investment, and innovation – is brighter than ever.

It's driven by our ecosystem of nearly 100 colleges and universities that are awarding over 90,000 degrees every year.¹ The graduates are staying and returning, attracted by our flourishing technology and innovation scene, our diverse economy, and by a quality of life that is – in a word – remarkable.

You can feel the energy, and see it too. Cranes dot the skylines from Camden, NJ to Philadelphia, PA and Newark, DE. Across Greater Philadelphia, over 5 million square feet of new prime industrial and office space is set to be delivered in 2019, with demand in both sectors set to increase in the near-term in our region.² Our universities are collaborating with civic and community leaders to build innovation districts, our corporate leaders are investing in new headquarters, and our developers are transforming industrial sites that are ripe for reinvestment into vibrant spaces.

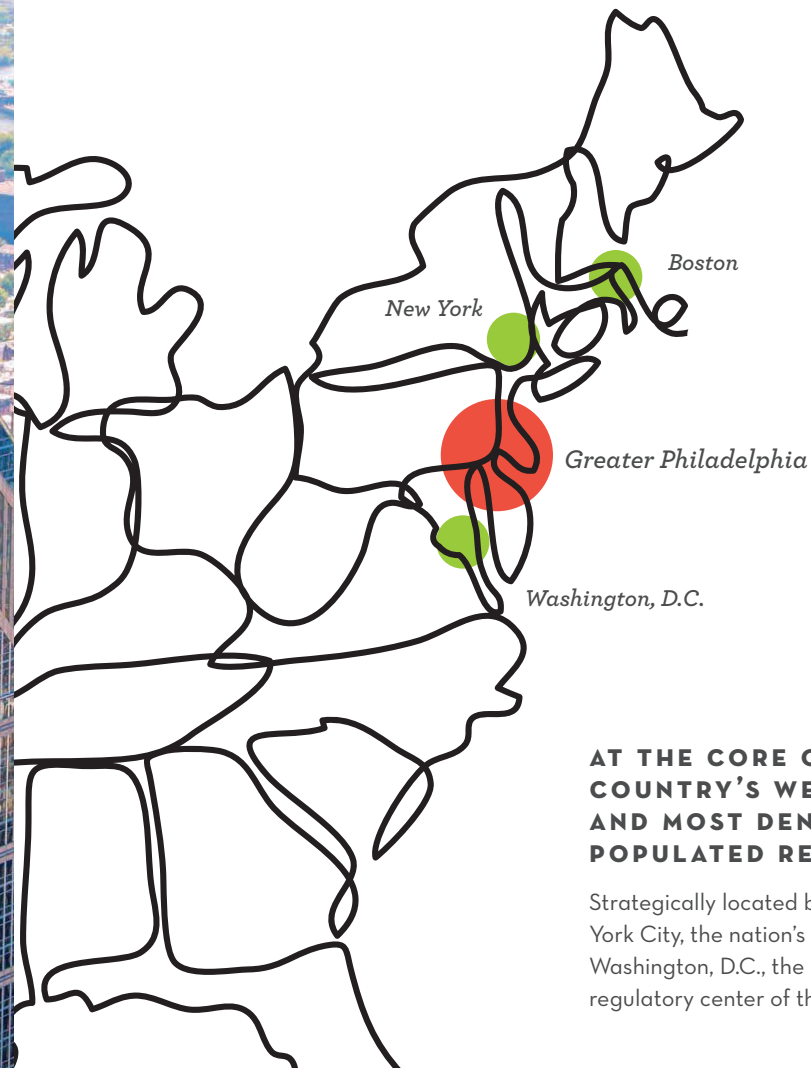
This is a place where ideas meet courage, where initiative is applauded, and where the entrepreneurial spirit is strong and passionate. In a place that is so well positioned for companies to locate and grow their operations, and for employees from all levels and industry sectors to establish and grow their careers, it is not surprising that scores of startups are flocking here, and that major Fortune 1000 leaders from around the globe call Greater Philadelphia home. If you are looking for opportunity, **Select Greater Philadelphia.**



OVERVIEW

Greater Philadelphia encompasses an 11-county neighborhood across northern Delaware, southern New Jersey, and southeastern Pennsylvania.

The region is a thriving mega-market with all the must-haves for success: a deep talent pool, unparalleled global access, a favorable cost of doing business, a robust infrastructure, a huge market of customers, and an incredible quality of life.



AT THE CORE OF THE COUNTRY'S WEALTHIEST AND MOST DENSELY POPULATED REGION

Strategically located between New York City, the nation's financial hub, and Washington, D.C., the legislative and regulatory center of the U.S.

LEADING THE NATION

- **#1 LOWEST OFFICE RENTAL RATES** among top metros³
- **3RD LARGEST METRO IN THE NORTHEAST** with \$445 billion in Gross Regional Product⁴
- **6TH LARGEST REGIONAL POPULATION** with 6.4 million people⁵
- **7TH LARGEST WORKFORCE** of 3.3 million, including highly-skilled talent in key industries: life sciences, energy and manufacturing, technology, financial services, and more⁶

the ELEVEN COUNTIES OF GREATER PHILADELPHIA



Bucks County



Burlington County



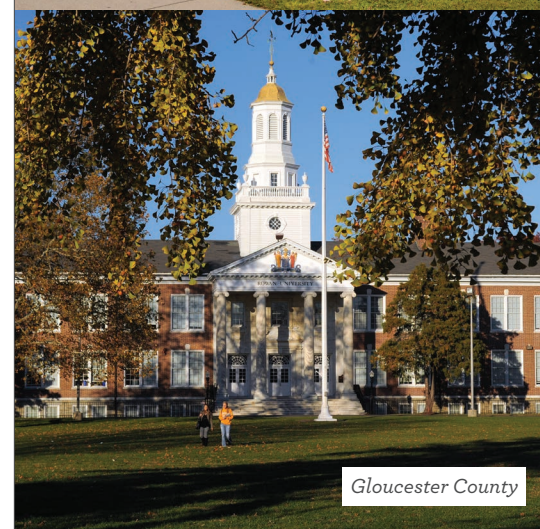
Camden County



Chester County



Delaware County



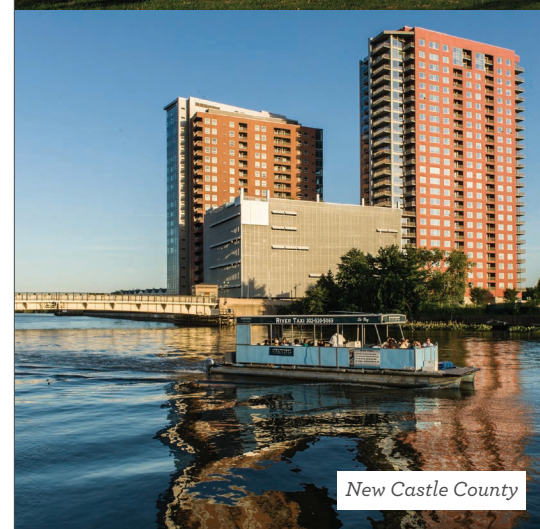
Gloucester County



Mercer County



Montgomery County



New Castle County



Philadelphia County



Salem County

WORKFORCE

*Highly educated,
ready-made for tomorrow*

Greater Philadelphia has a massive, talented labor force—the 7th largest in the U.S. Our 3.3 million workers are highly educated, with **38% holding a bachelor's degree or higher**—compared to 32% for the national average. But it's more than smarts that make our talent so exceptional—it's a spirit of cooperation, a passion for learning, creating, and innovating, and a drive to get things done.

Greater Philadelphia is home to **nearly 100 colleges and universities with half a million students**. That's the sixth largest university population among all U.S. metropolitan areas. Eager learners from around the world are **earning over 90,000 degrees annually** from research, engineering, business, entrepreneurial, liberal arts, and technology programs that set the standard of excellence in higher education. Drawn by our vibrant quality of life, **54% of 2010-2014 alumni chose to stay here to establish and grow their career and their families—compare that to the Greater Boston area, where recent alumni retention is only 42%.**⁷

The #1 Business School in the U.S.⁸

- University of Pennsylvania (Wharton)

Two of the top 20 colleges and universities in the world⁹

- Princeton University
- University of Pennsylvania

Three of the top 30 liberal arts colleges in the U.S.¹⁰

- Swarthmore College
- Haverford College
- Bryn Mawr College



FURTHER LISTENING

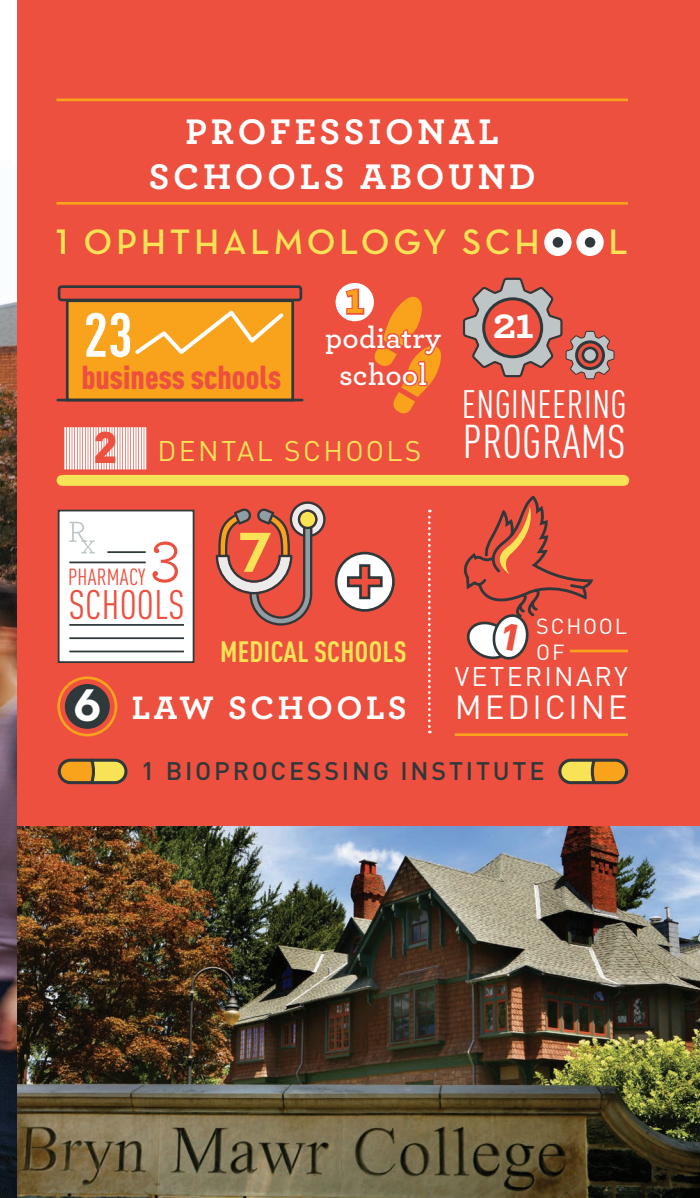


S1 Episode 08, The Human Condition: Learn how Saxbys and Think Company retain our region's top talent with an effective company culture.

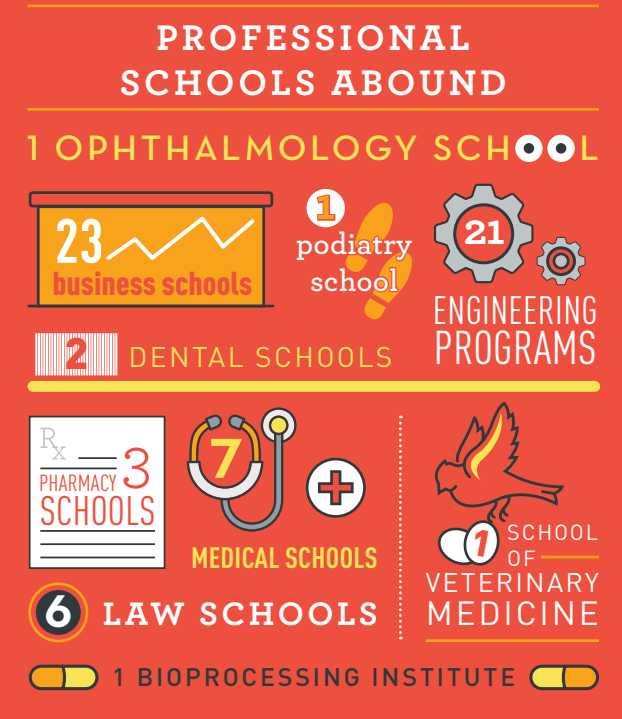


S1 Episode 10, Not What it Seems: Hear about Ernst & Young's inclusive hiring process.

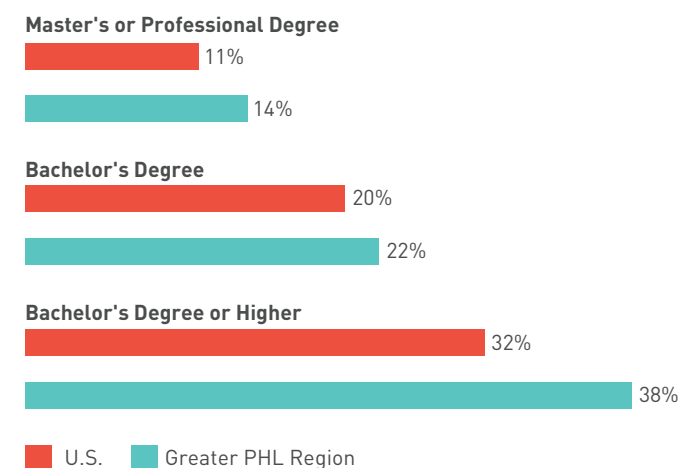
Listen at [SelectGreaterPHL.com/Podcast](https://selectgreaterphl.com/podcast) or wherever you get your podcasts.



L-R: A Benjamin Franklin statue in front of College Hall at the University of Pennsylvania; the statue of Drexel University's school mascot "Mario the Magnificent;" and the entrance to Bryn Mawr College in Montgomery County, PA.

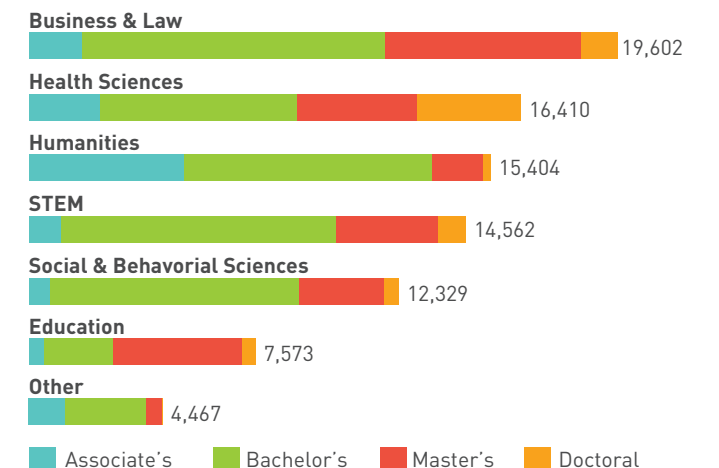


EDUCATIONAL ATTAINMENT IN THE U.S. AND GREATER PHILADELPHIA



Census Bureau; The Chamber of Commerce for Greater Philadelphia. Data as of September 13, 2018.

DEGREES AWARDED BY COLLEGES AND UNIVERSITIES IN THE REGION



Census Bureau; The Chamber of Commerce for Greater Philadelphia. Data as of September 13, 2018.

INNOVATION & ENTREPRENEURSHIP

Inventing the Future

Greater Philadelphia's innovation ecosystem is an inclusive community where networks are created and collaborations are forged. It's where entrepreneurs who have achieved their dreams encourage others to follow theirs. It's where business leaders, investors, and private angel funds interact with startup owners and service providers like never before.

Over the past 5 years, **venture capital funding** in Greater Philadelphia's health care and Internet sectors **totaled \$3 billion**, led by companies in biotechnology, drug development, Internet and software, among others.¹¹ Startups are being launched at over **85 incubators, accelerators, and co-working spaces**. Philadelphia has over 900,000 square-feet of co-working space, leased by 22 different service providers, with 555,000 square feet added to Center City over the past two years.¹² University programs for entrepreneurs at Delaware, Drexel, Penn, Rowan, Temple, Villanova, and others are encouraging innovative thinking by their students who are choosing to stay here.

We have the talent. We have the institutions. We have the investments. We also have the confidence, the acumen, collaborative spirit, and creative thinking needed for new business ventures. Greater Philadelphia is now one of the most attractive regions in the world for entrepreneurs and investors looking to establish and grow a business.

INVESTING BILLIONS IN UNIVERSITY INNOVATION

In 2017, the Brookings Institution issued *Connect to Compete*, a study of the opportunities to leverage Philadelphia's University City-Center City innovation district to grow jobs and increase economic competitiveness across our collective community. Leading the way in this effort are anchor institutions including the University of Pennsylvania and Drexel University. **The University of Pennsylvania's Pennovation Works is a 23-acre project, including the 58,000 square-foot Pennovation Center** that is bringing together private sector business leaders with academic researchers like never before. Nearby is the uCity Square neighborhood, home to the University City Science Center, an incubator community of scores of businesses of all sizes and industries. And just a few blocks away is **Drexel University's** Close School of Entrepreneurship, its Center for Functional Fabrics, and its novel **Schuylkill Yards project, a new 14-acre, \$3.5 billion gateway to University City** that is under development with Brandywine Realty Trust.

HIGHLY RATED FOR INNOVATION AND STARTUPS

- Philadelphia:** One of the **TOP 10 RISING CITIES FOR STARTUPS** *Forbes, The Top 10 Rising Cities for Startups. October 1, 2018.*
- Trenton:** One of the **12 MOST INNOVATIVE CITIES IN AMERICA** *24/7 Wall St., America's Most Innovative Cities. October 30, 2018.*
- Wilmington:** One of the **TOP SMALL CITIES TO START A SMALL BUSINESS** *Verizon Communications, The Best Small Cities to Start a Small Business. August 30, 2018.*



UNIVERSITY ENTREPRENEURIAL PROGRAMS AND TECHNOLOGY CAMPUSES

- Drexel University's Close School of Entrepreneurship and their Expressive and Creative Interaction Technologies (ExCITe) Center
- Rowan University's South Jersey Technology Park
- Temple University's Fox School of Business' Innovation & Entrepreneurship Institute
- University of Delaware's STAR Campus & JP Morgan Innovation Center
- University of Pennsylvania's Penn Center for Innovation
- Villanova University's Innovation, Creativity, and Entrepreneurship (ICE) Institute



FURTHER LISTENING

S1 Episode 06, Innovation at Pennovation: Learn more about the remarkable advances happening at University of Pennsylvania's Pennovation Center.

S1 Episode 30, Start to Finish: Hear how Lia Diagnostics has revolutionized the pregnancy test business.

Listen at **SelectGreaterPHL.com/Podcast** or wherever you get your podcasts.

TOP 10 METRO ACADEMIC R&D EXPENDITURES IN THE NATION



National Science Foundation, National Center for Science and Engineering Statistics, *Higher Education Research & Development Survey*. FY 2017; The Chamber of Commerce for Greater Philadelphia. Data as of November 20, 2018.



Above: the new Rohrer College of Business building at Rowan University in Gloucester County, NJ. Opposite page: rendering of the Schuylkill Yards development project in West Philadelphia.



LIFE SCIENCES

*World-Class,
World-Renowned*

Greater Philadelphia has an unmatched network of world-renowned research institutions, global inventors of medicines, medical devices and diagnostics, along with biotech and contract research organizations, and 14 major health systems. It's no surprise that our Tri-State community is a national leader in clinical trials, or that we are pioneering cell and gene therapies and personalized medicine, or that medical miracles are taking place here, like the world's first pediatric double hand transplant at the Children's Hospital of Philadelphia.

“We looked at all the major biotech hubs and academic centers and we chose Philadelphia because we found it to be the most exciting and vibrant of all the hubs in the country...There’s a great coordination taking place between the industry and the academic centers and the hospitals and the city and state.”

— JOHN F. CROWLEY, CHAIRMAN AND CEO OF AMICUS THERAPEUTICS¹³

Left: A stunning spiral staircase in the Padadakis Integrated Sciences Building at Drexel University. Opposite page: a rendering of the Discovery Labs, a large-scale workplace of lab and office space located in King of Prussia, PA.

CELL AND GENE THERAPY

Greater Philadelphia is recognized around the world as a leader in cell and gene therapies – 75% of the known vectors used in all cell and immune-therapy research were identified at the University of Pennsylvania, and the region is home to the world's first in-vivo gene therapy manufacturing. So, whether it's R&D or biopharmaceutical manufacturing, the region excels, equipped with more than **30 companies and over 60 labs specifically engaged in cell and gene therapies.**¹⁴ Moreover, the industry continues to receive a robust pipeline of talent with close to 500 biomedical engineering degrees last year from just six of our region's nearly 100 colleges and universities. To this point, **no county in the entire nation produces as many degrees in biomedical engineering as Philadelphia County.**

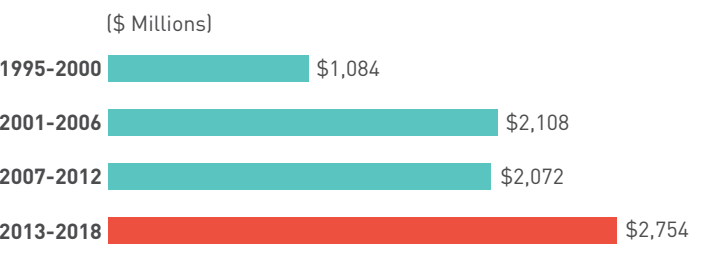
“For young scientists, Greater Philadelphia is a great place to be, especially because of the many innovation centers that help bring ideas to life.”

— CARL H. JUNE, MD, UNIVERSITY OF PENNSYLVANIA, PERELMAN SCHOOL OF MEDICINE

PRECISION MEDICINE


Advances in diagnostic computing technology, genetic sequencing and new bioinformatics tools continue to shape the developing field of precision medicine, with Greater Philadelphia at the forefront. **Our region is a leader in the field of “connected health,”** a subset of precision medicine that uses digital technology to enhance the delivery of high-quality health care via streamlined clinical care, data and records – fueled by novel patient and care giver communications. The region's deep roots in medical excellence have flourished into a budding life sciences ecosystem that's attracting record levels of venture capital funding across everything from disease diagnostics and medical devices, to state-of-the-art drug manufacturing and delivery.


VENTURE CAPITAL FUNDING IN HEALTH CARE SECTOR





PricewaterhouseCoopers, MoneyTree Report; The Chamber of Commerce for Greater Philadelphia. Data as of March 27, 2019.


GREATER PHILADELPHIA IS HOME TO:


**118**
HOSPITALS

A BIOPROCESSING INSTITUTE
A FIRST IN NORTH AMERICA

**7** CHILDREN'S HOSPITALS





**4** National Cancer Institute designated cancer centers



FURTHER LISTENING

S1 Episode 13, Partnering for Impact: Hear how the

Relay Network and Independence Blue Cross created a mobile health insurance communication program.

S1 Episode 36, Transforming Health

Care: Learn how Dan Hilferty of Independence Blue Cross is shaping the future of health care.

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VALUE & OPPORTUNITY

Your Money Goes Further

The best value in the Northeast United States can be found in Greater Philadelphia. Compared to Boston, New York City and Washington, D.C., **our region has a lower cost of doing business, lower office rental rates, lower cost of labor, and more affordable housing.** Your dollar goes further in Greater Philadelphia. This enables you to take on new and exciting opportunities that are only available here. Our region is dedicated to keeping our housing costs low and annual wages high while preserving our historic metropolitan roots.

Looking at regional price indexes, we can compare the local prices residents pay for goods and services against the national average. Overall, looking at all goods, services, and rents, Greater Philadelphia is only 5% above the national average, compared to 22% in New York City, and 12% in Boston. When it comes to prices paid for goods, Greater Philadelphians pay less than a 1% premium compared to the national average, whereas the D.C. and Seattle regions pay at least a 5% premium on goods.

REGIONAL PRICE PARITIES

Rank	Metro	% Above National Average
1	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	5
2	Baltimore-Columbia-Towson, MD	7
3	Miami-Fort Lauderdale-West Palm Beach, FL	8
4	Boston-Cambridge-Newton, MA-NH	12
5	Seattle-Tacoma-Bellevue, WA	12
6	San Diego-Carlsbad, CA	16
7	Los Angeles-Long Beach-Anaheim, CA	17
8	Washington-Arlington-Alexandria, DC-VA-MD-WV	18
9	New York-Newark-Jersey City, NY-NJ-PA	22
10	San Francisco-Oakland-Hayward, CA	28

Bureau of Economic Analysis; The Chamber of Commerce for Greater Philadelphia. Data as of May 16, 2019.

Along with diversity and opportunity, Greater Philadelphia offers security, with the price of housing seeing more stability than other cities. Our 11-county community has a varied economic base offering a wide variety of job opportunities for spouses, partners, and families of executives and professionals moving to the area. While Greater Philadelphia has the 6th largest population in the U.S., the value of living here, the exceptional educational options – from K-12 through post-graduate – as well as career, entrepreneurial, and business opportunities are unmatched.

LOW RENTAL RATES, HIGH QUALITY OF LIFE

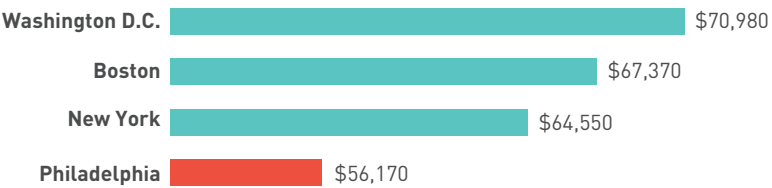
- **#1 LOWEST OFFICE RENTAL RATES** among top metros
Jones Lang LaSalle, Office Outlook Q4-2018. January 24, 2019.
- Philadelphia **#3 IN NATION FOR BEST CITIES FOR WOMEN IN THE TECHNOLOGY SECTOR**, based on gender pay gap, income after housing costs, percent of workforce, and employment growth
SmartAsset, The Best Cities for Women in Tech in 2019. March 26, 2019.



Above: a scenic view of Wilmington, DE, along the Christiana River. Opposite page: historic Philadelphia rowhomes on Spring Garden Street.

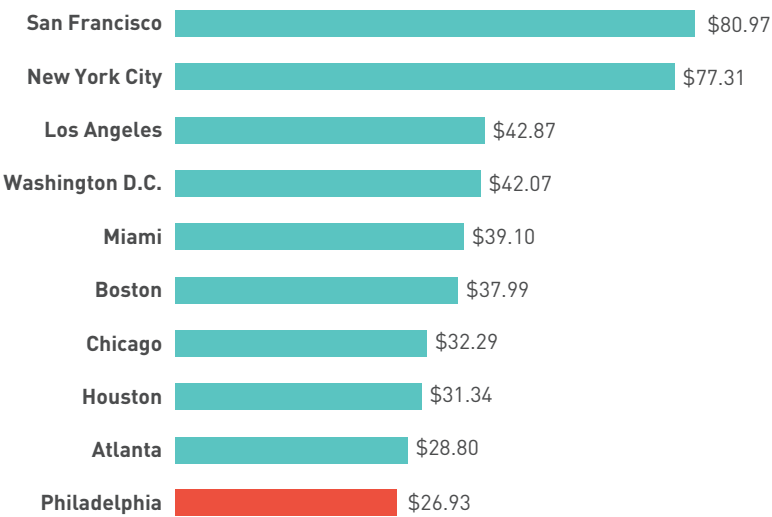


AVERAGE ANNUAL WAGES BY METRO



Bureau of Labor Statistics. Data as of March 29, 2019.

AVERAGE OFFICE RENTAL RATES (\$/SQF) Q4-2018



Jones Lang LaSalle, Office Outlook Q4-2018. Data as of January 24, 2019.



FURTHER LISTENING

S1 Episode 39, Declaring Their Independence: Hear

from homegrown companies Coral Homes and Smith Flooring Inc. on making their start in Greater Philadelphia.

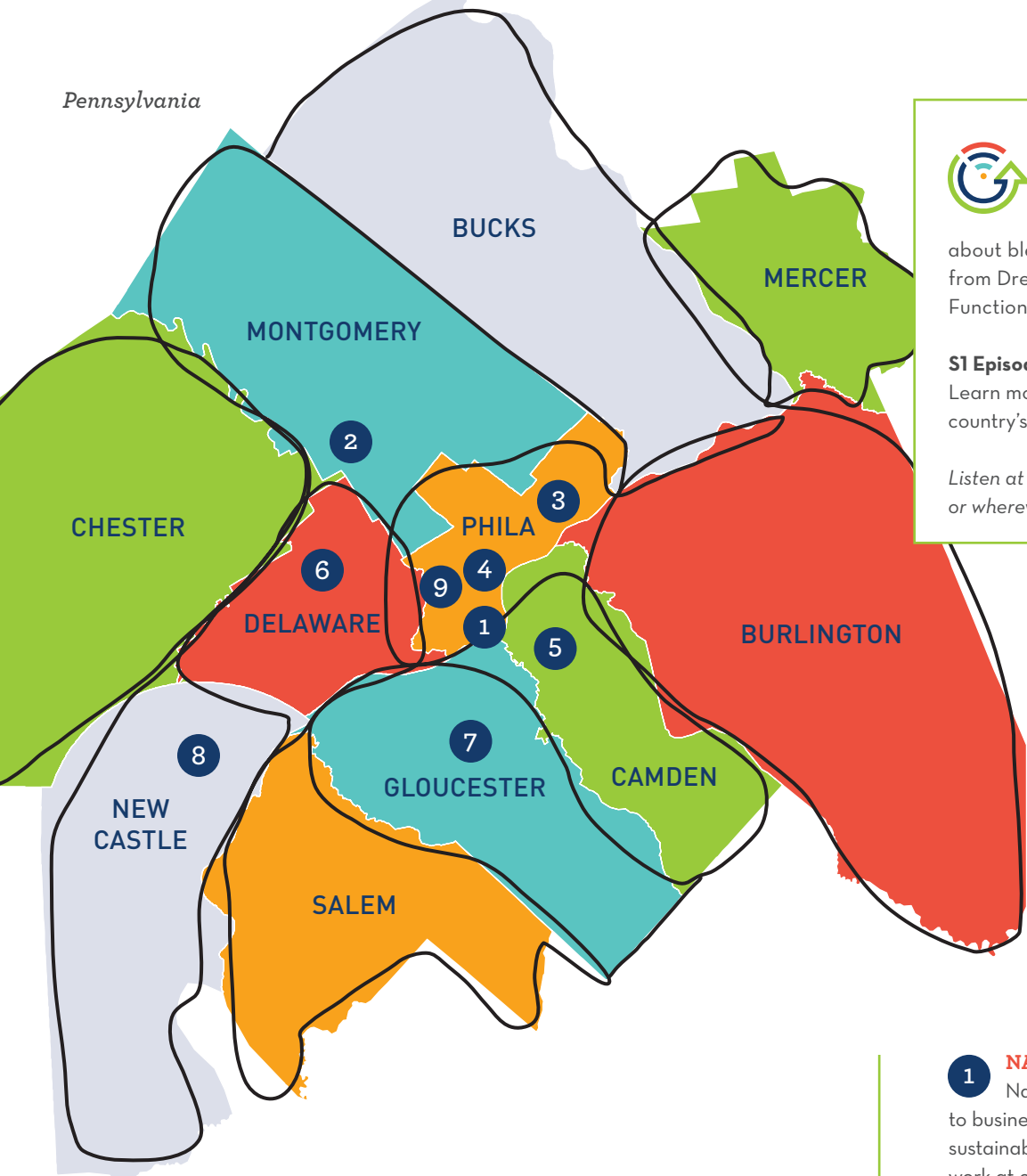
S2 Episode 02, A Race Against Time:

Hear from the CEO of Group K Diagnostics, Brianna Wronko, who created a device that can deliver blood test results in 20 minutes.

Listen at **SelectGreaterPHL.com/Podcast** or wherever you get your podcasts.



Pennsylvania



Delaware



FURTHER LISTENING

S1 Episode 12, Invention Reinvented:

Learn more about blending technology with textiles from Drexel University's Center for Functional Fabrics.

S1 Episode 21, From Concept to Reality:

Learn more about the evolution of our country's first urban research park.

Listen at [SelectGreaterPHL.com/Podcast](https://selectgreaterphl.com/podcast) or wherever you get your podcasts.

New Jersey

TRANSFORMATIONS

Growing Greater Philadelphia

Corporate developments, company relocations, and new work-live-play areas are changing the face of our communities—from Camden, Philadelphia, and Wilmington, to Ambler, Newtown Square, Malvern, King of Prussia, and Fairless Hills. Never before has the region experienced so many positive transformations. Across Greater Philadelphia, over 5 million square feet of new prime industrial and office space is set to be delivered in 2019, with demand in both sectors set to increase in the near-term in our region.

1 NAVY YARD: The Philadelphia Navy Yard is 1,200-acres dedicated to business growth, innovation, and sustainability. Nearly 14,000 employees work at over 165 companies—including GSK, Urban Outfitters, and WuXi AppTec—that operate in historic, industrial, and newly-constructed buildings along the Delaware River front.

2 KING OF PRUSSIA: Known as a regional commercial powerhouse, King of Prussia is home to more than 4,000 office, industrial, hospitality, dining, residential, and retail operations, including the King of Prussia Mall and new Town Center. Accessibility to public transportation, unmatched amenities, and hundreds of businesses makes King of Prussia a great place to live, work, play, educate, and innovate.

3 NORTH BROAD: Philadelphia's North Broad Street is being reimagined in historic ways. Stretching

from City Hall to Hunting Park and beyond and led by Temple University and several development partners, this community is actively transforming every day, creating new opportunities for businesses, arts and culture, residential living, dining destinations, education, health care, life science, and technology.

4 EAST MARKET: In the heart of Center City and home of modern urban living is East Market. This prime location, bounded by Market Street, Chestnut Street, City Hall, and the Historic District, has stimulated business growth, job creation, tourism, and demand for downtown living—thanks in part to a dynamic \$600 million master development plan.

5 CAMDEN: Just across the Delaware River is Camden, NJ, which continues its transformation into a welcoming and resilient business community. Remaining true to its roots as a

center of innovation and entrepreneurship, Camden is home to Cooper University Health Care, Campbell's Soup, Rutgers University, Subaru of America, American Water Company, Holtec International, and many others.

6 ELLIS PRESERVE: Located less than 20 miles southwest of Center City Philadelphia in Newtown Square, Delaware County is the new Ellis Preserve complex, a 218-acre development that offers dynamic and diverse residential, restaurant, retail, and office options to support growth and innovation.

7 SJ TECH PARK: Rowan University's South Jersey Tech Park welcomes entrepreneurs, inventors, researchers, students, and professors. It's home to the Samuel H. Jones Innovation Center, a 45,000 square-foot LEED Certified building with over 22,000 square feet of laboratory and office space for technology-focused research.

8 FIRST STATE CROSSING: A mixed use redevelopment in Northern Delaware, First State Crossing will connect highways and rail lines for commercial and residential uses. This revitalization of a former steel mill will stimulate economic growth in the Claymont area with its new \$54 million SEPTA transit center, Class A office, retail space, light industry, and 1,200 residential units on the Delaware River.

9 LOWER SCHUYLKILL / PENNOVATION: The revitalization of the Lower Schuylkill area is expected to create 6,500 new jobs and have a \$63 billion economic impact. The University of Pennsylvania's Pennovation Works, a 23-acre innovation and development property, attracts researchers, innovators, and entrepreneurs from around the country to the Lower Schuylkill area.



Clockwise from top left: an outside seating area in South Philadelphia's Navy Yard; the Samuel H. Jones Innovation Center in the South Jersey Tech Park at Rowan University; the Pennovation Center in the University of Pennsylvania's Pennovation Works; and the King of Prussia Mall, located right outside of Philadelphia and home to more than 450 stores.

ENERGY

Safe, Reliable and Affordable

With a diversified energy mix that boasts major investments in infrastructure and new technologies, **Greater Philadelphia is the epicenter for strategic energy generation, processing, and distribution in the Northeast Corridor**—and along the Eastern Seaboard—of the U.S. In addition to the region’s close proximity to an abundant natural gas supply, local electric and natural gas utilities are focused on delivering safe, reliable, clean, and affordable service for industrial, commercial and residential customers.

Abundant natural gas supplies from the Marcellus and Utica Shale regions will **continue to provide stable pricing for years to come, with commercial and residential prices near their lowest prices in 15 years.**¹⁵ Customers also continue to see more affordable electricity prices as lower-cost natural gas continues to be used in power generation. Customers in southeastern Pennsylvania also have the advantage of **choosing their electric and natural gas generation supplier**, providing options that fit the needs of their business and support their bottom line.

ENERGIZING THE FUTURE

Leading the way in Greater Philadelphia is PECO, an Exelon Company. As one of the premier providers of gas and electric service in the region, PECO is developing new programs that are transforming the energy experience for all customers, including smart grid and meter technology that offer new energy efficiency solutions, enhanced service reliability and customized energy options. Other energy milestones include:

- **Philadelphia Gas Works’ (PGW)** Pipeline Improvement Program is restoring 6,000 miles of pipeline, ensuring reliable natural gas is distributed safely and efficiently.
- The Navy Yard is a designated federal Energy Innovation Hub and houses the **GridSTAR Smart Grid Experience Center, a collaboration led by Penn State.**
- Due to the population growth in Delaware, Exelon Corporation-owned **Delmarva Power** is investing \$7 million into upgrading state substations.
- Through **PECO’s** System 2020 plan, \$274 million will be invested for the installation of advanced equipment to reinforce the local electric system.
- The **Adelphia Gateway Pipeline** is bringing enhanced access to natural gas along Eastern Pennsylvania, including to communities in southeastern Pennsylvania.
- National and international energy experts with decades of experience including **UGI** and **PJM Interconnection** are joined by novel start-ups like **Ameresco** and **Blue Sky Power** in calling Greater Philadelphia home.

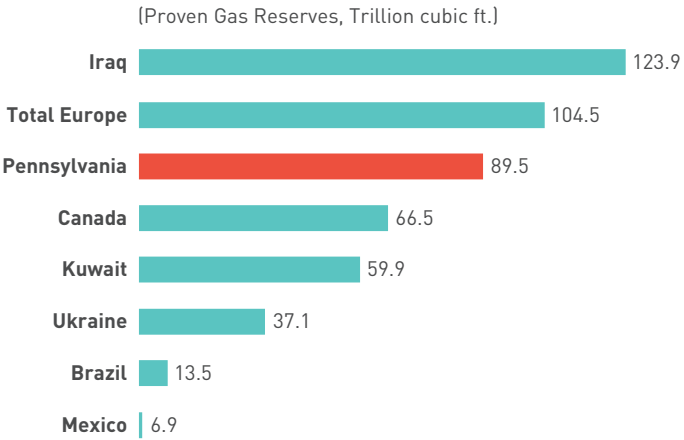
“Greater Philadelphia has the human capital, the intellectual capital, the physical infrastructure, and the funding to be the next Global Energy Hub.”

—DANIEL YERGIN, AUTHOR OF THE PRIZE: A HISTORY OF THE ENERGY BUSINESS

Above: construction workers build a new energy pipeline in Pennsylvania.
Opposite page: Holt Logistics’ solar panels at the Gloucester Marine Terminal in New Jersey.



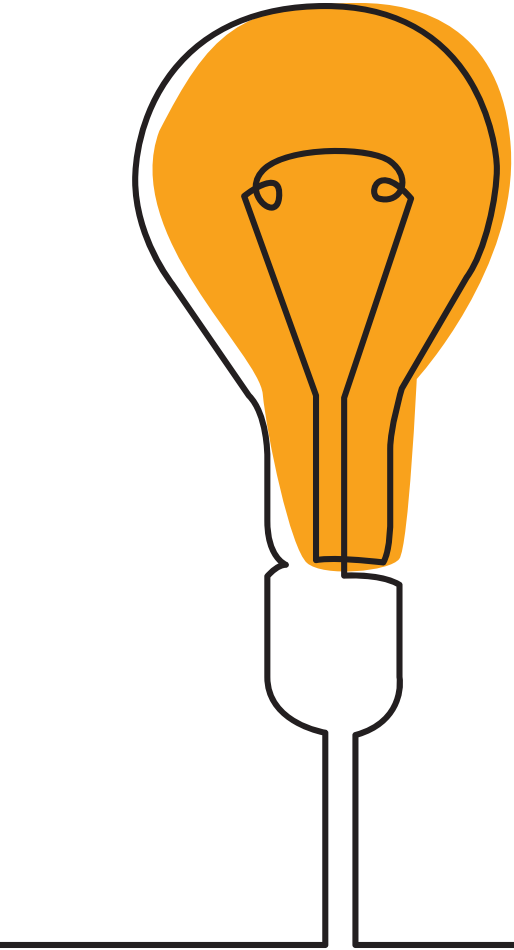
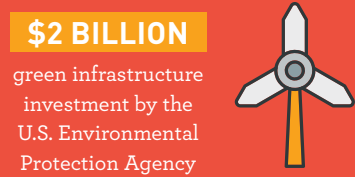
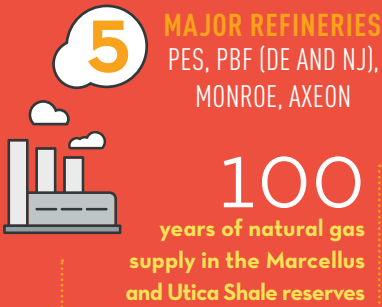
PA SHALE GAS: RESERVES TO SPARE



U.S. Energy Information Administration; BP plc, *Statistical Review of World Energy 2018*; The Chamber of Commerce for Greater Philadelphia. Data as of November 28, 2018.

The enormous economic implications of the Marcellus and Utica Shale plays cannot be understated. Technological advances in horizontal drilling and hydraulic fracturing have made Pennsylvania, and the surrounding region, a global energy player in its own right.

BECOMING AN ENERGY HUB



FURTHER LISTENING
S1 Episode 42, Evolving the Energy Ecosystem: Hear how Greater Philadelphia’s energy industry is fueling economic growth throughout the region and beyond.

S2 Episode 03, The Energy Backbone: Learn more about efficiently deploying renewable gas throughout our region and the world with Philadelphia Gas Works & UGI Corporation.

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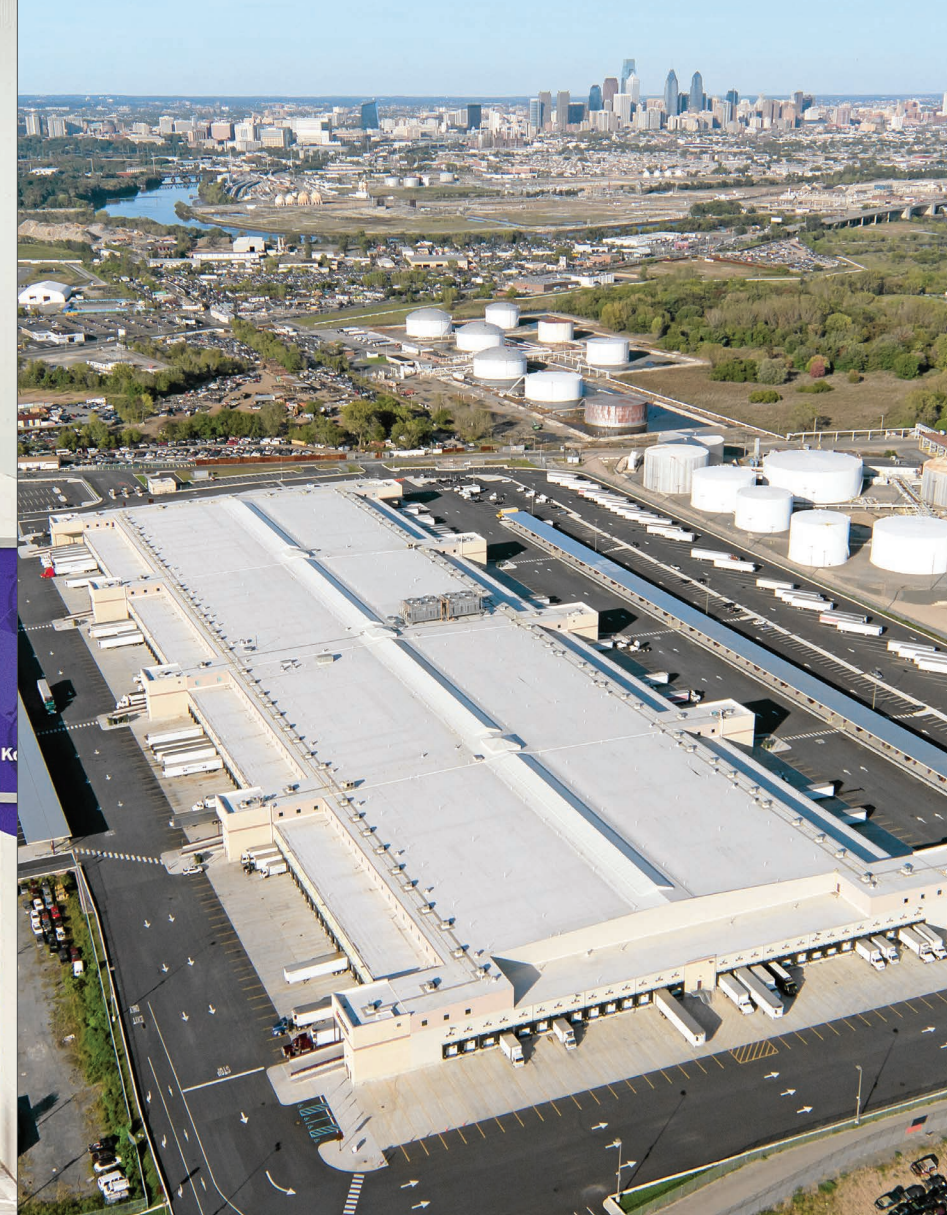
ACCESS TO MARKET

East Coast Gateway to the World

Any company interested in getting its people, products, and information around the U.S. and the world will find Greater Philadelphia's location and infrastructure unparalleled. Our northern Delaware, southern New Jersey, and southeastern Pennsylvania community is a key gateway to reach the U.S. market—and to reach Europe, Asia, and South America—making it one of the top distribution channels for global trade.

Greater Philadelphia is at the heart of one of the largest economic regions in the world—the total gross regional product within a 200-mile radius of our region would rank 4th in the world if considered a single national economy. With **40% of the U.S. population within a day's drive of Greater Philadelphia and 60% of the U.S. and Canadian populations accessible via a 2-hour flight**,¹⁶ it's no wonder why Philadelphia is considered one of the top 10 cities in the country to open a distribution center.¹⁷

For over a century, Greater Philadelphia has been a hub for food distribution and is home to the largest fully enclosed, fully refrigerated produce distribution terminal in the world, the **Philadelphia Wholesale Produce Market**. That said, cold storage in the region goes beyond foods and beverages—it supports the health care sector with a technologically advanced cold storage and transportation network, capable of delivering temperature sensitive medicines and therapies from across the region. Add in Philadelphia's close proximity to other high population centers on the East Coast and its ability to ship products efficiently to Western Europe and Canada, and you have the foundation for a global logistics hub.



L-R: the Philadelphia Wholesale Produce Market is the largest fully enclosed, fully refrigerated wholesale produce terminal in the world; an overhead view of the Philadelphia Wholesale Produce Market; and the Port of Philadelphia on Packer Avenue in South Philadelphia.



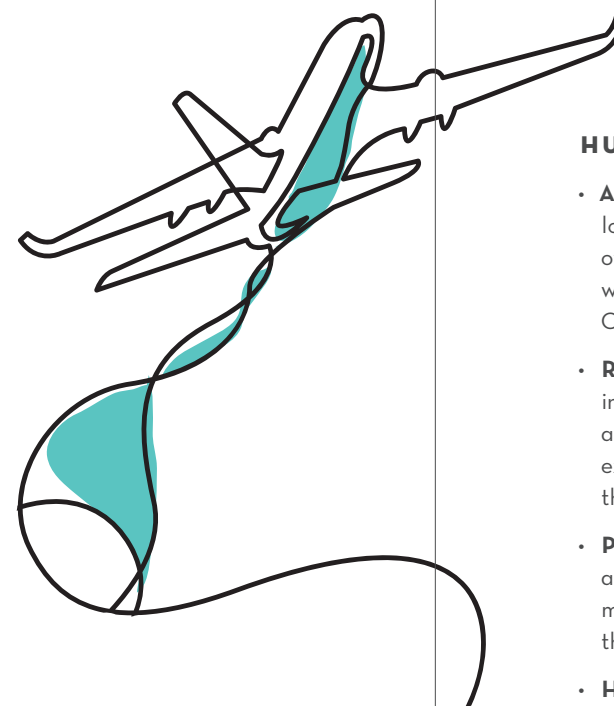
FURTHER LISTENING

S1 Episode 23, Engineering the Future:

Learn more about our region's infrastructure and accessibility from Paulsboro Marine Terminal and Pennoni.

S1 Episode 26, The Golden Door: Hear how Saint-Gobain Corporation is serving a wide variety of markets throughout the region and the world, from transportation, to infrastructure, to industrial, and more.

Listen at [SelectGreaterPHL.com/Podcast](https://selectgreaterphl.com/podcast) or wherever you get your podcasts.



HUNDREDS OF DISTRIBUTION CENTERS MAKE THEIR HOME IN GREATER PHILADELPHIA

- **Amazon** operates 21 fulfillment, distribution, and sortation locations across the Greater Philadelphia region, covering over 7.7 million square feet. This includes seven massive warehouses across Mercer, Gloucester, Burlington, and New Castle counties.
- **RLS Logistics** opened a state-of-the-art cold storage facility in Delanco, New Jersey that showcases some of the most advanced technologies and practices in cold storage and is expected to have a direct impact on pharmaceutical trade through both Philadelphia and New Jersey ports.
- **Philadelphia International Airport's** acquisition of a 135-acre parcel adjacent to the airport for the development of a massive air-freight complex will increase volume for carriers in the region.
- **Holt Logistics**, operator of the Packer Avenue Marine Terminal in South Philadelphia, became the first independent port

operator to conduct a pilot of blockchain-based global trade digitization solutions by Maersk and IBM. The investment in the blockchain platform illustrates Greater Philadelphia's logistical leadership.

- **The Port of Philadelphia, Port of Wilmington, and the Port of Paulsboro** are major import-export gateways fueling growth across the 11-county region. The Port of Philadelphia is the 15th-largest seaport in the U.S. by value of goods traded and tonnage.¹⁸

The \$330 million project to deepen the Delaware River set into motion the opening of the Port of Paulsboro in Gloucester County, New Jersey in 2016—the first new port to be built on the Delaware River in 50 years, bringing miles of new rail lines and an anticipated 2,000 jobs to southern New Jersey and our collective community.

EXPERT INFRASTRUCTURE



5 INTERNATIONAL AIRPORTS WITHIN A 90-MINUTE DRIVE



3RD busiest AMTRAK station in the U.S.

2 Class I freight railroads



100+ INTERSTATE HIGHWAY INTERCHANGES



3 MAJOR SHIPPING PORTS ALONG THE DELAWARE RIVER

ROBUST PIPELINE INFRASTRUCTURE



Small cell and 5G investments that offer reliable, comprehensive wireless access





TECHNOLOGY

Creating Tomorrow Today

Greater Philadelphia is a choice destination for both technology companies and the skilled talent that sustains them. It starts with a highly skilled labor force of science, technology, and engineering experts along with technicians and workers professionally trained at scores of trade schools, technical colleges, and top universities. Philadelphia is home to leading companies in areas such as robotics, advanced logistics, ecommerce, software, biotechnology, financial technology (fintech), and telecommunications.

Industry leader **Comcast NBCUniversal's newly opened \$1.5 billion Technology Center provides 1.8 million square feet of new space** for the company's growing workforce of more than 4,000 technologists, engineers, and software architects, and serves as the dedicated home for Comcast's LIFT Labs—an incubator space for local technology startups.

As technology innovation and digitization intensity increases, companies across all industries are increasingly in need of high-tech talent. Greater Philadelphia is no exception, with occupations across information security, software, and data scientists driving high-tech job growth.

FINTECH

Mobile banking and investments, peer-to-peer lending and payments, mobile fraud detection—these are just some of the financial technology (fintech) innovations transforming the financial services sector. Existing financial services companies in Greater Philadelphia have been investing and acquiring new technologies to support their mobile offerings, while start-ups continue to foster new sub-industries and opportunities for job growth in our region.

Greater Philadelphia is home to world-class financial services companies like **Vanguard, SEI, Radian, Delaware Investments, Lincoln Financial, FS Investments, Chubb** and **Colonial Penn**, as well as innovative fintech and financial startups like **Vertex Inc., eMoney Advisor, Wirecard, and Amino Payments**. Located at the heart of one of the wealthiest regions in the world, banks and investment houses, large and small, have deep roots here, or have established operations in this market, including: **Bank of America, Bank of NY Mellon, Capital One, JP Morgan Chase, Janney Montgomery Scott, Citizens Bank, PNC Bank, TD Bank, WSFS** and **Wells Fargo**.

TALENT FOR TOMORROW

- Philadelphia: **TOP 25 MARKET FOR TECH TALENT** in the U.S. and Canada CBRE, *Scoring Tech Talent*. July 2018.
- Philadelphia: **ONE OF THE MOST INNOVATIVE CITIES IN THE WORLD** based on human infrastructure 2thinknow, *Innovation Cities™ Program*. 2018.
- Greater Philadelphia is **HOME TO SOME OF THE BEST COMPUTER SCIENCE PROGRAMS IN THE COUNTRY**: Princeton University (#8), University of Pennsylvania (#19), University of Delaware (#68), Drexel University (#82) U.S. News & World Report, *Best Computer Science Programs*. March 2018.



FURTHER LISTENING

S1 Episode 11, Kitty Hawk:

Learn more about our region's entrepreneurial spirit from two innovative startups, Aerial Applications and Astarte Medical Partners.

S1 Episode 37, The Long Game:

Hear how we're training our region's next generation of skilled tech workers from Tech Impact and Wick Fisher White.

Listen at [SelectGreaterPHL.com/Podcast](https://selectgreaterphl.com/podcast) or wherever you get your podcasts.

PREPARING HIGH-TECH WORKERS

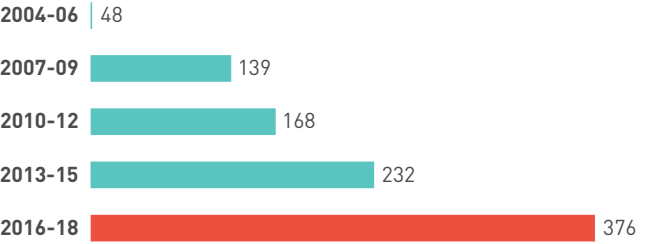
Collaboration is creating a pipeline of skilled high-tech workers that can thrive in a new digital era of big data, blockchain, and cyber intrusion. County governments and local organizations have partnered to form incubators and accelerators to foster growth in new technologies and services. Likewise, a new alliance between industry and educational institutions is providing students with advanced skills for exciting, high-tech careers. This includes jobs in information security, software, hardware and data science, which continue to grow at a steady rate in our region. The bottom line: public/private partnerships are infusing a new economic vibrancy across the region by creating high-tech jobs and training students to fill them.

GROWING VENTURE CAPITAL

Over the past three years, the Philadelphia Metro Area's Internet sector has attracted \$376 million dollars in venture capital funding, a 62% increase over the prior three-year period and nearly eight times the levels seen during 2004-2006. Investments were largely focused on Internet software and services companies, as well as several ecommerce deals.

VENTURE CAPITAL FUNDING IN INTERNET SECTOR

(\$ Millions)



PricewaterhouseCoopers, *MoneyTree Report*; The Chamber of Commerce for Greater Philadelphia. Data as of February 14, 2019.

LEADING IN DIGITAL HEALTH

Greater Philadelphia is home to one of the most comprehensive health care ecosystems in the nation. Digital health startups are supported by the region's accelerators, investors, and research institutions, and many of the established players have begun to develop and invest in digital health care technologies as well. **Penn, Drexel, Temple, Jefferson, Princeton, Christiana Care, Comcast, Quil, Relay Network, and Independence Blue Cross** are among Greater Philadelphia's leading experts that are investing in—and transforming—access to data through tele-health to improve health outcomes.

THE REGION'S HIGH-TECH JOBS

Job Category	2013	2018	2019*	2013-19
Information Security	2,543	2,591	2,693	4%
Data Scientists	5,181	5,378	5,450	5%
Software	54,229	56,145	56,633	4%
Hardware	44,254	45,466	45,624	3%
Total High-Tech	106,207	109,580	110,346	4%

*Forecast by JobsEQ. Data are for the 4th-quarter in respective years. The Chamber of Commerce for Greater Philadelphia; JobsEQ; Bureau of Labor Statistics. Data as of January 4, 2019.

Left: the new Comcast Technology Center skyscraper in downtown Philadelphia.
Above: the Thomas Jefferson University Hospital skyway over top of 10th Street in Philadelphia.



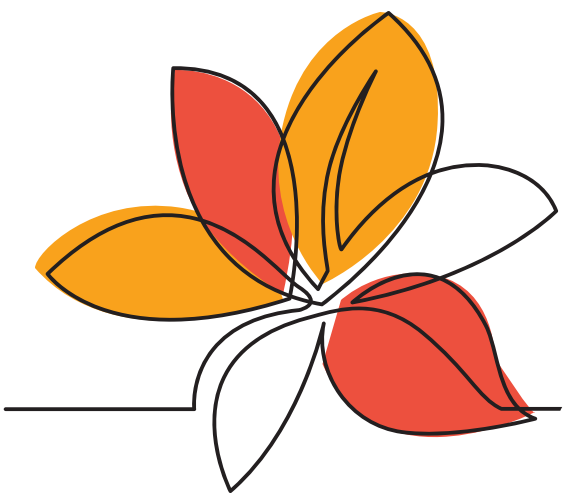
LIVABILITY

A Place to Call Home

Dynamic, modern, cutting-edge—the vibe in our region is one of pure excitement, and for good reason. **Home to the nation's first zoo, botanical garden, and art museum**, the Greater Philadelphia region has a rich legacy of arts and culture, outdoor life, sports, food, and entertainment. We embrace new restaurants, music venues and cultural festivals with the same fervor as our **eight professional sports teams**. That's right, eight teams—including the Philadelphia Fusion, an esports team, which is part of the Overwatch League. The Fusion's new \$50 million facility is a 3,500 seat arena that is set to be located in the heart of the South Philadelphia Sports Complex, making it the largest newly constructed, dedicated esports arena in the Western Hemisphere.

Our historic sites and museums, including Valley Forge National Historic Park, Longwood Gardens, and the world-renowned Barnes Foundation, have put Greater Philadelphia on the map as one of the premier cultural destinations in the world. In 2015, **Philadelphia was named the first World Heritage City in the U.S.**, further enhancing the region's global profile. In 2017, the groundbreaking new Museum of the American Revolution opened its doors, adding to our cultural assets and our pride.

For adults and children alike, there's a never-ending list of things to do, see, and learn.



EXPLORING THE GREATER OUTDOORS

- Home to 30 public gardens in 30 miles including Chester County's iconic **Longwood Gardens** and Philadelphia's **Bartram's Garden**, the oldest still-living botanical garden in all of North America.
- With 300 miles of interconnected trails, the **Circuit Trails** span nine counties in southeastern Pennsylvania and southern New Jersey and are one of the largest trail networks in the country, with plans to expand to 750 miles.
- **Philadelphia's Fairmount Park**, one of the world's largest city park systems, has over 9,200 acres of waterfront, woodlands, and parks for residents and visitors to enjoy.
- Greater Philadelphia residents and visitors are a short drive from the **beaches and boardwalks of Delaware and the Jersey Shore**, as well as lakes and slopes of **Pennsylvania's Pocono Mountains**, offering all-season activities for the entire family.

WORLD-CLASS ELEMENTARY AND HIGH SCHOOLS

- Greater Philadelphia is **home to many of the top-ranked K-12 school districts in the nation**: Tredyffrin-Easttown #4 (Chester County), Radnor Township #5 (Delaware County), Lower Merion #18 (Montgomery County), Wallingford-Swarthmore #22 (Delaware County), Princeton Public Schools #26 (Mercer County). *Niche.com, Best School Districts in America*. March 2019.
- Greater Philadelphia has roughly 2,700 K-12 schools including **some of the top-rated high schools in the nation**: Downingtown STEM Academy (#34), Julia R. Masterman Secondary School (#86). *U.S. News & World Report, Best High Schools*. March 2019.
- Our region also has some of the **best STEM schools in the nation**: West Windsor-Plainsboro High School South (#17), Charter School of Wilmington (#19), West-Windsor-Plainsboro High School North (#40), Conestoga High School (#46). *U.S. News & World Report, Best STEM Schools*. March 2019.

K-12 SCHOOLS IN GREATER PHILADELPHIA

Public		Private			
Bucks		Burlington		Camden	
123	144	131	66	148	82
Chester		Delaware		Gloucester	
108	125	109	141	86	38
Mercer		Montgomery		New Castle	
99	76	157	229	123	112
Philadelphia		Salem		TOTAL	
309	235	34	2	1,427	1,250

PA/NJ/DE Departments of Education, privateschoolreview.com.

Left: the soon-to-be constructed Philadelphia Fusion esports arena in the South Philadelphia Sport Complex. This page: Bartram's Garden, a National Historical Landmark located in Southwest Philadelphia.

TOP CULTURAL DESTINATION

- Philadelphia ranks **#4 BEST HISTORIC DESTINATION** in the U.S. *U.S. News & World Report*, March 2019.
- Philadelphia ranks **6TH IN THE WORLD FOR FOOD AND 7TH FOR DRINK** *Out Magazine and Tapestry Research*, March 11, 2019.
- **#11 MOST VIBRANT ARTS COMMUNITIES IN AMERICA**—Philadelphia. National Center for Arts Research at South Methodist University, *The Top 40 Most Vibrant Arts Communities in America*. July 2, 2018.
- Philadelphia's Zahav is named the **2019 #1 RESTAURANT IN AMERICA BY THE JAMES BEARD AWARDS**



FURTHER LISTENING

S1 Episode 03, Cue Montage: Learn more about our region's diverse neighborhoods and how they're attracting professionals to live, work, and thrive.

S1 Episode 32, The Philly Special: Hear how IMS Technology Services masterminded the Philadelphia Eagles Super Bowl Parade.

Listen at SelectGreaterPHL.com/Podcast or wherever you get your podcasts.

CONNECTIONS

The Ultimate Collaborators

The people of Greater Philadelphia are perhaps best known for their expertise at collaborating and connecting with others within the region—and around the country and the world—to develop and implement on a vision. This spirit of collaboration is in our DNA and goes well beyond the founding of modern democracy and of the United States of America in the late 1700s. It extends to business, education, research, discovery, and more.

COLLABORATIVE SUCCESSES ARE IN OUR GENES

- U.S. regulatory approval of the world's first genetically engineered immune therapy, a T-cell treatment for pediatric leukemia developed at the **University of Pennsylvania** in collaboration with **Children's Hospital of Philadelphia**, and **Novartis**. It's fitting that the U.S. FDA referred to their endorsement of this new gene therapy as a "historic action," as it continues Philadelphia's lineage of major milestones in medical research and life sciences.
- Formed in 1927 by utility leaders in Pennsylvania, New Jersey, and Maryland, **PJM Interconnection** today is the world's largest distributor of electricity, serving 65 million people in 14 states. With access to massive amounts of natural gas being extracted from Pennsylvania's shale rock formations, collaborations in the energy sector being fueled by industry leaders **PECO**, **PGW**, **UGI**, and others continue to drive economic growth and job creation.
- Johnson & Johnson established its first-ever JPOD in Greater Philadelphia to connect regional innovators to the **Johnson & Johnson Innovation** network in order to identify and accelerate the development of early-stage health care solutions from the life science ecosystem of northern Delaware, southern New Jersey, and southeastern Pennsylvania.
- With dynamic, creative leaders that include **Comcast**, **Jefferson Health**, **Independence Blue Cross**, **University of Pennsylvania**, **Drexel University**, **Temple**, and more, the Chamber's **CEO Council for Growth's** precision medicine initiative is harnessing the region's expertise in cell and gene therapy to shape and define the future of health care and life sciences R&D to benefit patients around the globe.

Greater Philadelphia's collaborative community is exemplified in the **Action Teams of the Chamber of Commerce for Greater Philadelphia**. These focused cohorts of outcomes-oriented, industry leaders collaborate on substantive work that directly impacts their businesses and our community. Each action team organizes around a clear vision for the region:

- Education & Talent:** Greater Philadelphia will be a premier talent hub through innovative and cross-sector collaborative partnerships.
- Energy:** Greater Philadelphia will be a leading destination in manufacturing, fueled by an advanced, affordable, diversified, low-carbon energy economy.
- Health Care:** Greater Philadelphia will collaborate to leverage its health care and technology assets and be recognized as the global leader in health care innovation.
- Middle Market:** Greater Philadelphia is a top U.S. region for the middle market with sustained, double-digit growth.
- Roadmap for Growth:** A pro-growth, pro-jobs common agenda to lift and improve Philadelphia's economic and civic life.

There is something special about our business, civic, and academic community that inspires a coming together rarely seen in other regions. We work together not because we have to, but because we want to, knowing that our collaborative style will produce results that benefit all.



FURTHER LISTENING

S1 Episode 41, Team Spirit:

Learn about connecting sponsors with youth sports leagues from the novel tech start-up, LeagueSide.

S2 Episode 07, Energizing the Economy:

Learn more about how our region's infrastructure is ultimately driving economic growth from NJR Energy Services and Buchanan Ingersoll & Rooney PC.

Listen at **SelectGreaterPHL.com/Podcast** or wherever you get your podcasts.



ECONOMIC DEVELOPMENT PARTNERS

Select Greater Philadelphia serves as a gateway to academic, business and civic leaders who can help advance an expansion project from concept to implementation. We deliver on this goal in part by partnering with state and county economic development teams—all of whom can help you and can be reached directly.

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Top: the Benjamin Franklin Bridge connecting Philadelphia, PA to Camden, NJ. Below: a skyline view of Wilmington, DE.



ABOUT SELECT

Let Us Be Your Guide

Select Greater Philadelphia is the business attraction organization for the 11-county region of northern Delaware, southern New Jersey, and southeastern Pennsylvania. We are focused on shaping and showcasing the image and reputation of Greater Philadelphia by telling the story of our region and its business assets through a clear narrative that positions our neighborhood nationally and globally—and regionally too, encouraging businesses to establish and grow their operations in our community. The Select team delivers comprehensive services that drive our mission and add value for our investors, partners and prospects, including:

MARKETING & COMMUNICATIONS

We tell the story of working, growing, living, and playing in the 11-county region, encouraging companies to locate or expand their operations in our community. Paid advertising, media relations, online messaging, and events that bring partners and prospects together are examples of the wide-ranging communications activities Select develops and implements.

BUSINESS EXPANSION SERVICES

Select is the “go to” team for companies, site selectors, and real estate representatives working on behalf of organizations from around the world seeking to locate or expand in our region. We listen, understand, advise, and guide the course of location and expansion activities.

CONNECTOR & COLLABORATOR SERVICES

We connect organizations seeking to locate or expand in the region with economic development teams, real estate professionals, business experts, academic and civic leaders, and others as needed to help move plans and ideas from concept to reality.

RESEARCH SERVICES

Select’s professional researcher provides comprehensive regional data to help site selectors, economic development teams, real estate professionals and others make informed decisions related to locating and expanding across the 11-county region.

GROWING GREATER

Select Greater Philadelphia’s podcast and television show—**Growing Greater**—takes you on a journey with innovators, entrepreneurs, and academic, business, and civic leaders from diverse industries who share stories of turning concepts into reality, developing business relationships, and creating impact. *Growing Greater* shares success stories of businesses large and small with thousands of listeners and viewers across our region, nation, and world. To listen, tune in wherever you get your podcasts and at slctphl.co/Podcast. To watch Select’s collaboration with NBC10, visit slctphl.co/YouTube.

Left: Philadelphia’s Chinese Lantern Festival in Franklin Square.

SELECT ADVISORY BOARD

Select’s Advisory Board is an exclusive team of c-suite leaders who help guide Select’s operations, promote the region and Select, and help attract new businesses and new jobs to northern Delaware, southern New Jersey, and southeastern Pennsylvania.

Anthony Bartolomeo President & CEO, Pennoni <i>(Vice Chair, Select Advisory Board)</i>	Ernest J. Dianastasis CEO, The Precisionists, Inc.	Dr. Patrick T. Harker President & CEO, Federal Reserve Bank of Philadelphia	William R. Sasso, Esq. Chairman, Stradley Ronon <i>(Chair, Select Advisory Board)</i>
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Craig R. Carnaroli Executive Vice President, University of Pennsylvania	Daniel K. Fitzpatrick President of Citizens Bank of PA/NJ/DE, Head of National Mid-Corporate Industry Verticals, Citizens Bank	Tom Harper Division Manager, Wells Fargo	Robert C. Wonderling President & CEO, The Chamber of Commerce for Greater Philadelphia
Stephen Clark EVP & Chief Commercial Banking Officer, WSFS Bank	John A. Fry President, Drexel University	Joseph G. Meterchick Regional President, PNC	William C. Yoh Chairman, Yoh Co., Co-Owner, Day & Zimmermann
Nicholas DeBenedictis Chairman Emeritus, Aqua America, Inc.	William P. Hankowsky Chairman, President, & CEO, Liberty Property Trust	Denis P. O’Brien Senior Executive Vice President, Exelon Corporation	

YOU CAN HELP GROW OUR COLLECTIVE COMMUNITY THROUGH THE EMISSARY PROGRAM

Our Emissary Program is a team of diverse academic, business and civic leaders who are passionate about living, working, and innovating in Greater Philadelphia, and who want to serve as focused, highly engaged advocates to promote our community as the place to establish and grow a business and a career to a national and global audience. By helping to position the unique and dynamic business assets of our community, Select’s Emissaries help drive the economic vibrancy of our collective community through attracting new businesses and new jobs to our 11-county region. You too can become a Select Emissary. Learn more here: slctphl.co/Emissaries.

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p. 2: One Liberty Observation Deck courtesy of One Liberty Observation Deck; p.3: Chester County’s Longwood Gardens – B. Krist for Visit Philadelphia; Gloucester County’s Rowan University courtesy of Rowan University; p.5: Drexel University – Paul Loftland for PHLCVB; p.6: Schuylkill Yards rendering courtesy of SHoP Architects PC and West 8; Rowan University Business Building courtesy of Rowan University; p.8: Padadakis Integrated Sciences Building at Drexel – University Communications for PHLCVB; p.9: Discovery Labs rendering courtesy of Genster; p.13: South Jersey Tech Park courtesy of Rowan University; King of Prussia rendering courtesy of Simon Property Group; p. 14: energy pipeline – George Sheldon/Shutterstock.com; Holt Logistics solar panels courtesy of Holt Logistics; p.16: PHL Wholesale Produce Market – Heather DiPiazza Photography; p.17: Holt Logistics refrigerated warehouse – Heather DiPiazza Photography; p.18: Thomas Jefferson University Hospital skyway courtesy of Thomas Jefferson University; p.20: Fusion Arena rendering courtesy of Comcast Spectacor; p.21: Bartram’s Garden – R. Kennedy for Visit Philadelphia; p.24: Philadelphia Chinese Lantern Festival – K. Huff for PHLCVB

THANKS TO OUR SUPPORTERS

Select acknowledges with appreciation the following partners that have invested in Select's efforts to market the region and attract businesses, jobs, and talent to Greater Philadelphia.

DEVELOPER & CULTIVATOR



BUILDER



CONSTRUCTOR

American Executive Centers	Berkshire Hathaway	Coral Homes	JLL
American Solutions for Business	HomeServices, Fox & Roach Realtors	Cushman & Wakefield	The Precisionists, Inc.
Associated Builders & Contractors of Eastern Pennsylvania	Blank Rome LLP	Day & Zimmermann	Rowan University
BDO	Buchanan Ingersoll & Rooney	Diversified Search, Inc.	Tierney
	Carroll Engineering	IntePros Consulting	The Wistar Institute
	CBRE	Invest: Philadelphia	W.L. Gore & Associates, Inc.



SELECT GREATER PHILADELPHIA, a Council of The Chamber of Commerce for Greater Philadelphia, is the business attraction marketing organization for the 11-county region of northern Delaware, southern New Jersey, and southeastern Pennsylvania. Through a dedicated focus on marketing and communications activities, Select showcases Greater Philadelphia to a regional, national, and international audience with the goal of growing the economic vibrancy of our collective community by creating new jobs through attracting new businesses to the area and supporting the expansion of existing organizations.

Select Greater Philadelphia Council
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SelectGreaterPHL.com • +1 (215) 790-3653

SUPPORT SELECT

Select Greater Philadelphia Council is supported by business and civic leaders who want to infuse a new economic vibrancy across our region by creating new jobs and attracting new businesses to our community. To learn more about ways to engage with Select, please contact Matt Cabrey at mcabrey@selectgreaterphl.com or at +1 (215) 790-3727.

SPECIAL THANKS TO:

