

# State of the South Shore – Retrospective Analysis of Demographic and Economic Trends

May 2025



UMassAmherst

Donahue Institute  
Economic and  
Public Policy Research

# State of the South Shore

Prepared by the UMass Donahue Institute's  
Economic & Public Policy Research Group

---

**Project Leader**

Branner Stewart, Senior Research  
Manager

**Project Staff**

Lily Harris, Senior Research Analyst  
Rye McKenzie, Research Analyst

**Research Assistants**

Sofia Molina

**Unit Director**

Mark Melnik, Director of Economic & Public  
Policy Research

---

Established in 1971, the UMass Donahue Institute is a public service, research, and economic development arm of the University of Massachusetts. Our mission is to foster healthy communities and support economies that alleviate poverty and promote opportunity. In collaboration with partner organizations and clients, we carry out our mission through research, education and training, capacity building, and direct services to strengthen our collective impact. For more information:

[www.donahue.umass.edu](http://www.donahue.umass.edu).

The Institute's Economic & Public Policy Research (EPPR) group provides clients in Massachusetts, New England, and beyond with impartial analyses on economic and other policy matters. EPPR is at the front lines of action-oriented public policy research examining the social determinants of health and work, as well as broad issues of inequality, community vitality, economic opportunity, and upward mobility. Featuring mixed methods research approaches including economic modeling, population projections, geospatial analysis, surveys, interviews, focus groups, and secondary data analysis, EPPR helps clients make informed decisions about strategic policy, planning, and investment priorities. Since 2003, EPPR has been the officially designated State Data Center for Massachusetts and serves as the state's liaison to the Population Division of the U.S. Census Bureau. Additionally, EPPR produces *MassBenchmarks*, an economic journal that presents timely information on the performance and strategic direction of the Massachusetts economy.

---

UMassAmherst

Donahue Institute  
Economic and  
Public Policy Research

## Table of Contents

---

Introduction .....	6
South Shore Demographic Profile .....	7
Education .....	14
Housing.....	17
Shore Economy – Income and Industry Characteristics.....	21
The Healthcare Sector in the South Shore as an Economic Development Opportunity..	32
Progress on 2014 Policy Priorities .....	35
Appendix.....	36

## List of Tables

---

Table 1 Population Growth by Race 2010-2020 .....	11
Table 2 Top Employers in the South Shore for Jobs Postings .....	29
Table 3 Commute time, 2023 .....	30
Table 4 Healthcare Industry in South Shore .....	32

## List of Figures

---

Figure 1 Projected Population Growth 2020-2030 .....	7
Figure 2 Age Composition of South Shore 2020-2050.....	8
Figure 3 Projected Population Change 2020-2050 .....	9
Figure 4 South Shore 2050 Projection by City and Town .....	10
Figure 5 2020 Race and Ethnicity Shares .....	10
Figure 6 Per Capita Income Index, 1990-2021.....	12
Figure 7 Median Household Income 2012 and 2022 .....	13
Figure 8 Share of Low Income Students in 2022 – South Shore Compared to Massachusetts.....	14
Figure 9 Graduation Rates by Region, 2022 – South Shore Compared to Massachusetts and U.S.....	15
Figure 10 Dropout Rate by Region, 2022 .....	15
Figure 11 Educational Attainment by Region .....	16
Figure 12 Building permits per 1,000 Residents, 2023 .....	17
Figure 13 South Shore Commute Modes of Transportation.....	18
Figure 14 2023 Gross Median Rent.....	19
Figure 15 2023 Median Single Family Home Sales Price .....	19
Figure 16 Job Growth Index 2003-2023 .....	21
Figure 17 Employment in South Shore .....	22
Figure 18 Labor Force Size: Norfolk and Plymouth Counties Labor Force, Annual Average 2018-2023 ....	22
Figure 19 South Shore Labor Force Participation Rate, 2013 to 2023.....	23
Figure 20 South Shore Unemployment Rate, 2013 to 2023 .....	23
Figure 21 South Shore Industry Mix Compared to Massachusetts, 2023.....	24
Figure 22 South Shore Industry Concentrations (Location Quotients) Compared to Massachusetts, 2023 .....	25
Figure 23 Growing Industries in South Shore, 2013-2023 .....	26
Figure 24 Declining Industries in South Shore, 2013-2023.....	27
Figure 25 Aging Workers - Share of Workers Age 55+ by 2 Digit Industry Sector, 2023 .....	28
Figure 26 Average Earnings Per Job, 2023 .....	29
Figure 27 Commuting Patterns in South Shore 2022 .....	30
Figure 28 South Shore Hospitals .....	33
Figure 29 Population Growth.....	36
Figure 30 Projected Population Growth .....	36
Figure 31 Share of Low Income Students .....	36
Figure 32 Graduation Rate.....	37
Figure 33 Dropout Rate.....	37

# Introduction

---

The South Shore Chamber of Commerce commissioned the UMass Donahue Institute to conduct a study of the South Shore region with a particular focus on how the region has performed economically and demographically over the last ten years. The “State of the South Shore” updates a study performed by Market Street in 2014. The South Shore Chamber of Commerce identified the need for an updated and in-depth analysis of the region in order to inform strategies to move the Massachusetts South Shore forward in coming years. By providing a shared understanding of the region, the study will help provide an empirically backed foundation for establishing priorities at the South Shore Chamber of Commerce that will help the region to better capitalize on its assets and become more competitive in the future.

The Massachusetts South Shore encompasses an area that includes much of Plymouth and Norfolk counties, stretching from MBTA Red Line (or adjacent) communities in the north and then following Route 3 almost to the Cape Cod Canal to the south, a distance of about 50 miles. As such, the region is diverse in nature, including dense inner urban cities like Quincy, affluent suburbs like Milton, Hingham, Scituate, Marshfield, and Duxbury, inland agricultural areas, and popular visitor destinations like Plymouth. Over half of the South Shore’s communities face the Massachusetts coastline, an asset that makes the area attractive to homeowners and tourists alike. Today, the 25 cities and towns within the South Shore Chamber of Commerce’s coverage area comprise 8.4 percent of the Massachusetts population (about 590,000 people living in the South Shore and 7.0 percent of the state’s total jobs (about 286,000 people working at South Shore establishments). The South Shore region tends to be highly educated with a substantially greater share of its adult population having a bachelor’s degree or higher than the U.S. average. The South Shore, reflective of its education levels and proximity to high paying jobs in the Boston core, also has high income levels overall.

As in the rest of the state, South Shore confronts issues with housing affordability with both high rents and high home values. However, the South Shore’s housing production levels, while lagging the nation’s, are still substantially higher than the state’s. That, in conjunction with a strong construction industry in the South Shore, may point to the region as a location for home-building that could help address the state’s imbalance between housing supply and housing demand. Along with construction, other concentrated sectors in the South Shore economy are generally related to meeting resident demand – namely healthcare, retail, and leisure and hospitality, though the latter sector also supports a vibrant tourism industry in the region. The region has sectoral strength in finance and insurance, with major office facilities for companies like State Street Bank and Blue Cross Blue Shield, among others. In contrast, the region does not possess the same intensity in sectors like professional and technical services or manufacturing – both cornerstones of the Massachusetts tech economy. That said, a look at the past ten years does show growth research and development jobs in the region and the region is seeing development in areas like submersible-related technologies.

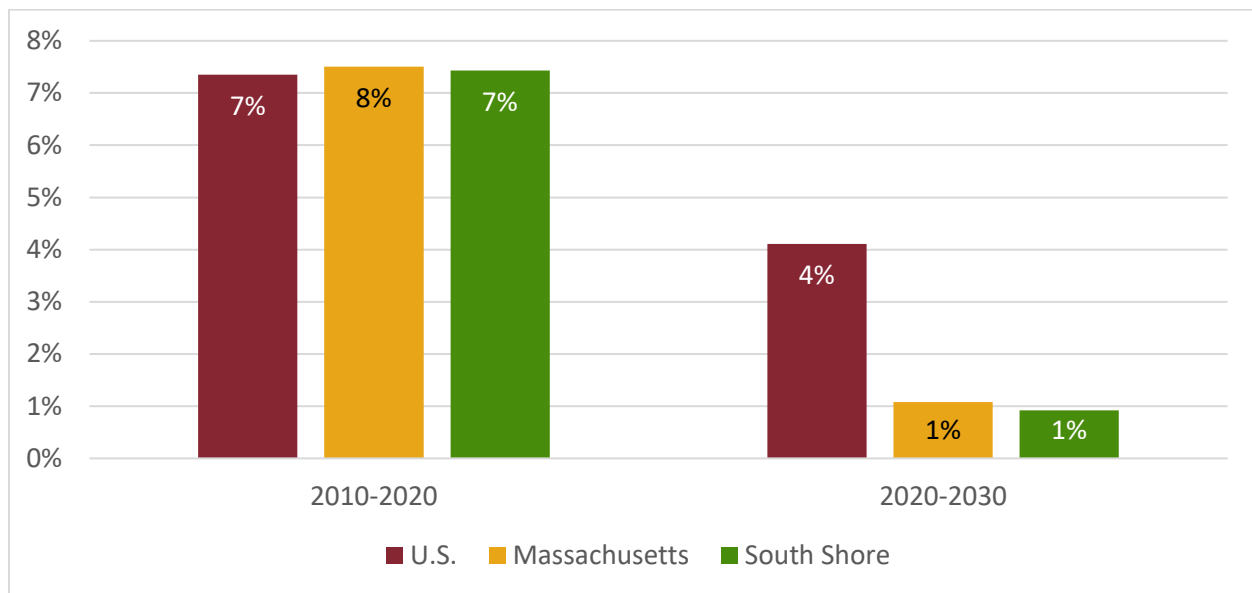
This study takes a retrospective look at the past ten years in the South Shore region, essentially describing existing conditions. With the current report serving as a foundation, future work for the South Shore Chamber of Commerce will look at the region, strategically, in the post-pandemic environment. A goal of future work will be to develop policy recommendations for growing the South Shore economy in the context of an aging labor supply and adapting the region favorably to the high incidence of remote and hybrid work that has been a structural post-COVID change (considerations may include competing for young workers, transportation, housing, community amenities, etc.).

---

## South Shore Demographic Profile

Over the past ten years, South Shore has experienced steady population growth in line with state and national trends. However, while the 2010s saw robust expansion, **Figure 1** below demonstrates that growth is expected to slow considerably in the coming decades—mirroring broader statewide patterns that lag behind national trends—and the overall population may even decline, though only slightly. Lower fertility rates, an aging of the population, and net domestic outmigration all contribute to this pattern, counterbalanced somewhat by international migration which can be inconsistent due, in part, to changing federal policies.

**Figure 1 Projected Population Growth 2020-2030**

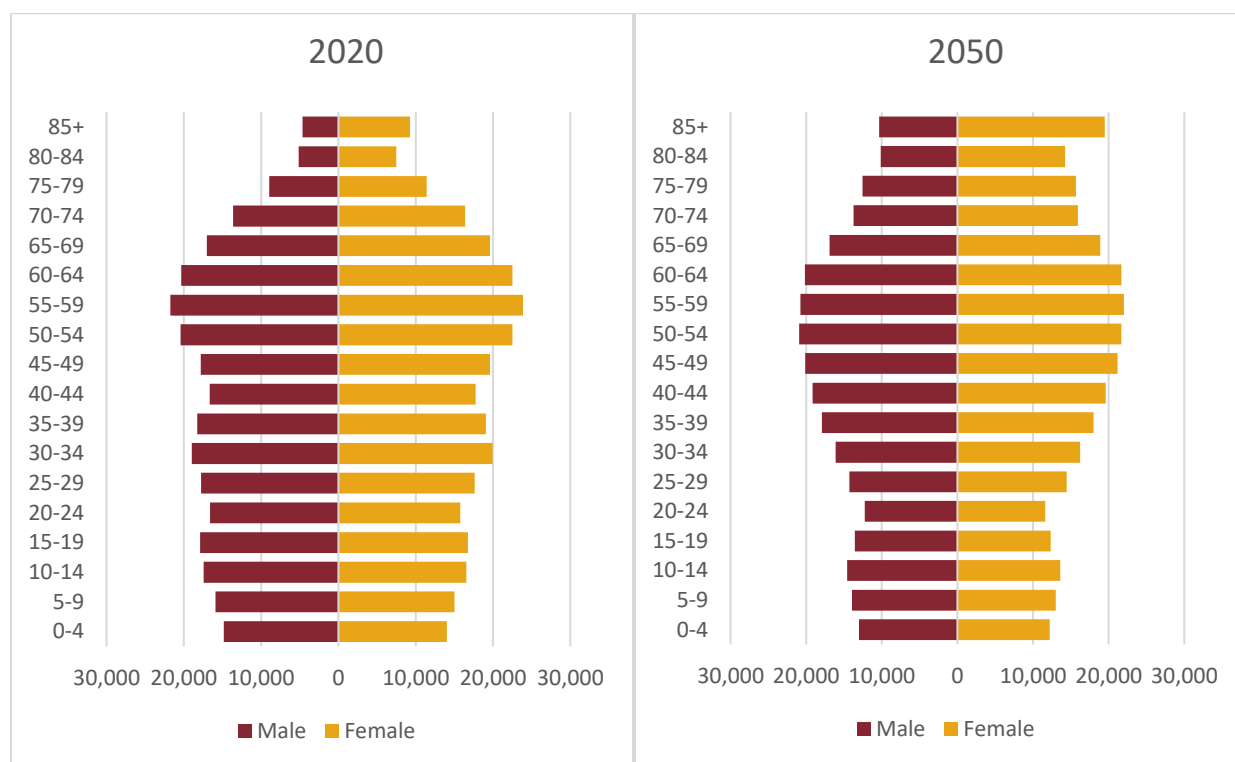


Source: UMass Donahue Institute MassDOT Vintage 2022 Population Projections. November 2022. (UMDI-DOT V2022)

South Shore faces several emerging challenges. Projections shown in **Figure 2** indicate a significant shift in the age distribution, with the largest current age group being 50–59 and part of a noticeable bulge just before retirement. Meanwhile, forecasts for 2050 suggest a much smaller population under 30 and a considerably larger cohort over 80, with women in the latter group poised to become one of the

largest segments. This aging trend, coupled with a shrinking younger workforce, has important implications for workforce development, housing, and social services.

**Figure 2 Age Composition of South Shore 2020-2050**

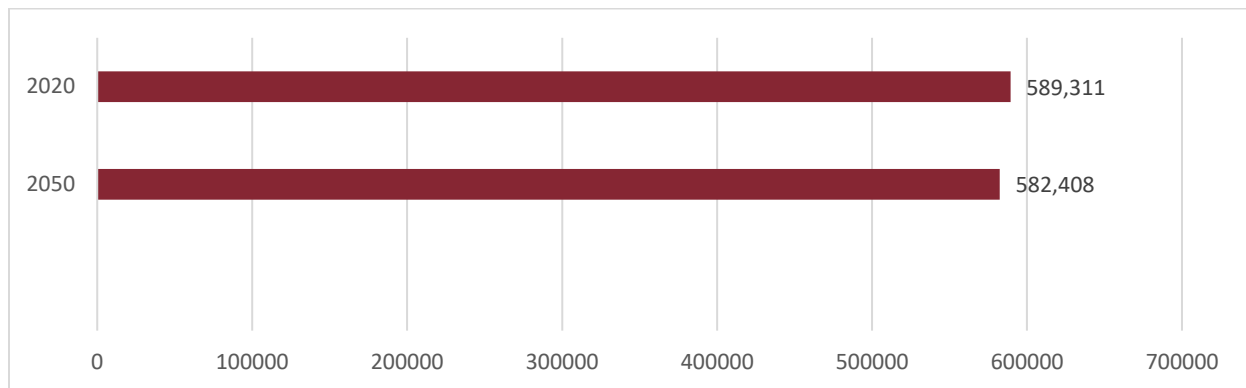


Source: UMass Donahue Institute MassDOT Vintage 2022 Population Projections. November 2022. (UMDI-DOT V2022)

In addition to these demographic shifts, this section discusses recent changes in racial and ethnic composition along with economic indicators such as rising per capita and median household incomes to provide further context to the region's overall profile and performance. Together, these trends underscore the need for comprehensive planning to address South Shore's future needs and framing strategies to capitalize on future opportunities. The following analysis explores these key trends, offering insights into how the region's population has changed over the past decade and may continue to evolve over time.



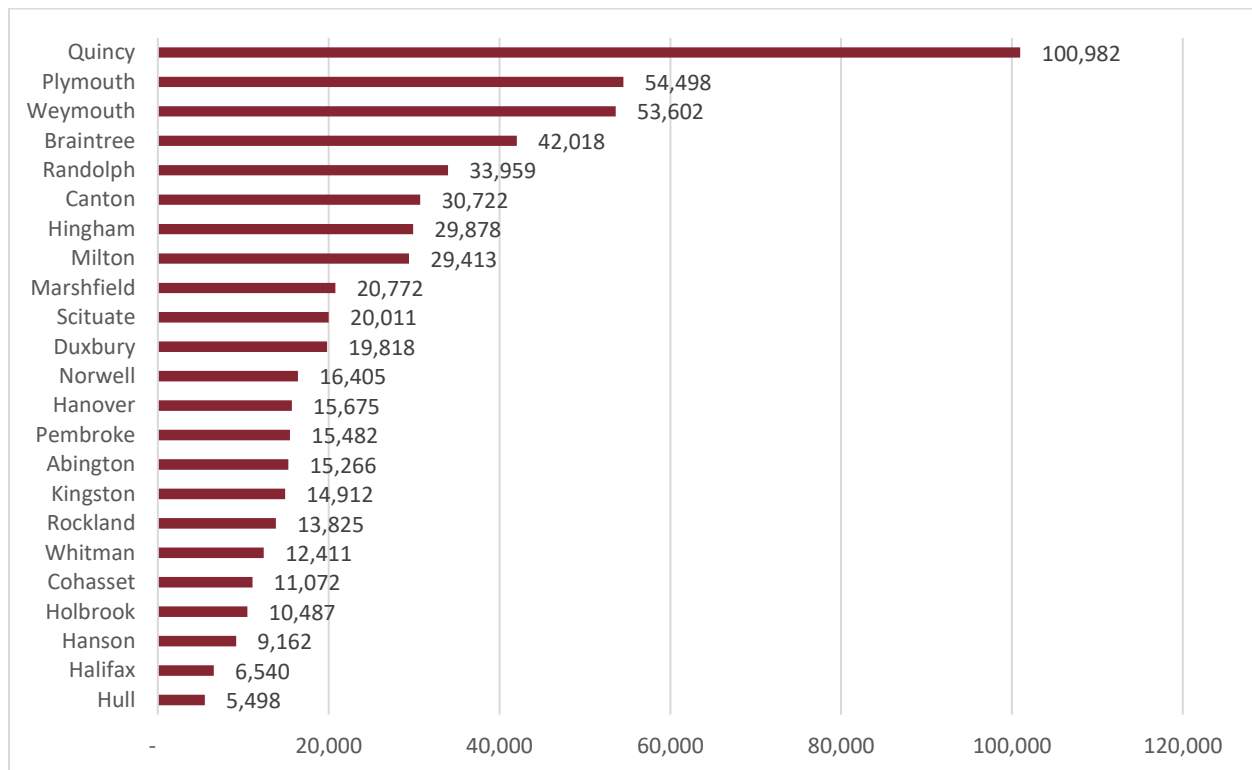
**Figure 3 Projected Population Change 2020-2050**



*Source: UMass Donahue Institute MassDOT Vintage 2022 Population Projections. November 2022. (UMDI-DOT V2022)*

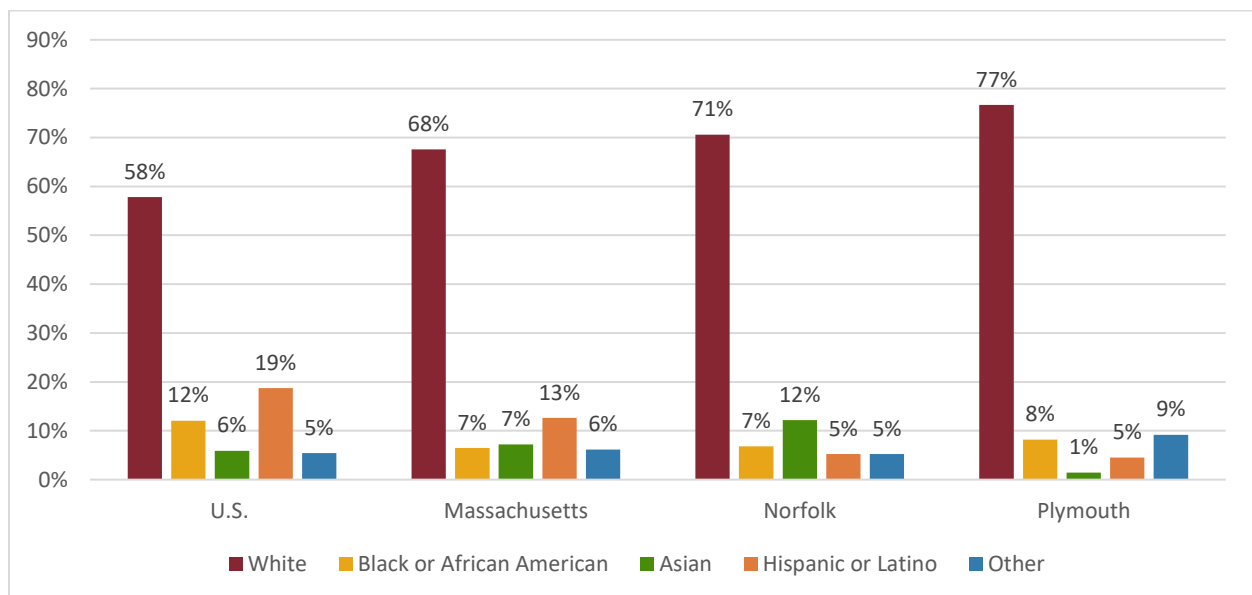
South Shore's overall population is expected to decline slightly over the next thirty years, with around 7,000 fewer residents by 2050. **Figure 4** below shows that the region's largest population centers are not expected to change, with Quincy maintaining a population of just over 100,000 and making up around a sixth of South Shore's population. Note that Quincy's population reached a record 101,636 in 2020, but the projections, currently, are expecting no growth due to declining fertility (the Massachusetts fertility rate has declined substantially over the past 20 years) and uncertainties about international in-migration. That said, the introduction of new multi-family apartment buildings and a continued inflow of international residents would push Quincy's population higher than what is shown in today's projections. The remaining population will continue to be fairly spread out, with Plymouth and Weymouth maintaining populations above 50,000, and Braintree above 40,000, with most other towns around 30,000 or lower.

**Figure 4 South Shore 2050 Projection by City and Town**



Source: UMass Donahue Institute MassDOT Vintage 2022 Population Projections. November 2022. (UMDI-DOT V2022)

**Figure 5 2020 Race and Ethnicity Shares**



Source: U.S. Census Bureau 2020 Decennial Census

Because race and ethnicity data were unavailable for exclusively the South Shore region, we used the combination of Norfolk and Plymouth Counties as a proxy (a geography commonly used in the 2013 Market Street report as a representation of the South Shore). **Figure 5** shows that both counties are over 70 percent white, which is a higher share than the state as a whole, with Plymouth being nearly 80 percent white. The other race and ethnicity groups are under all under 10 percent of the population aside from the Asian population in Norfolk County, which is 12 percent.

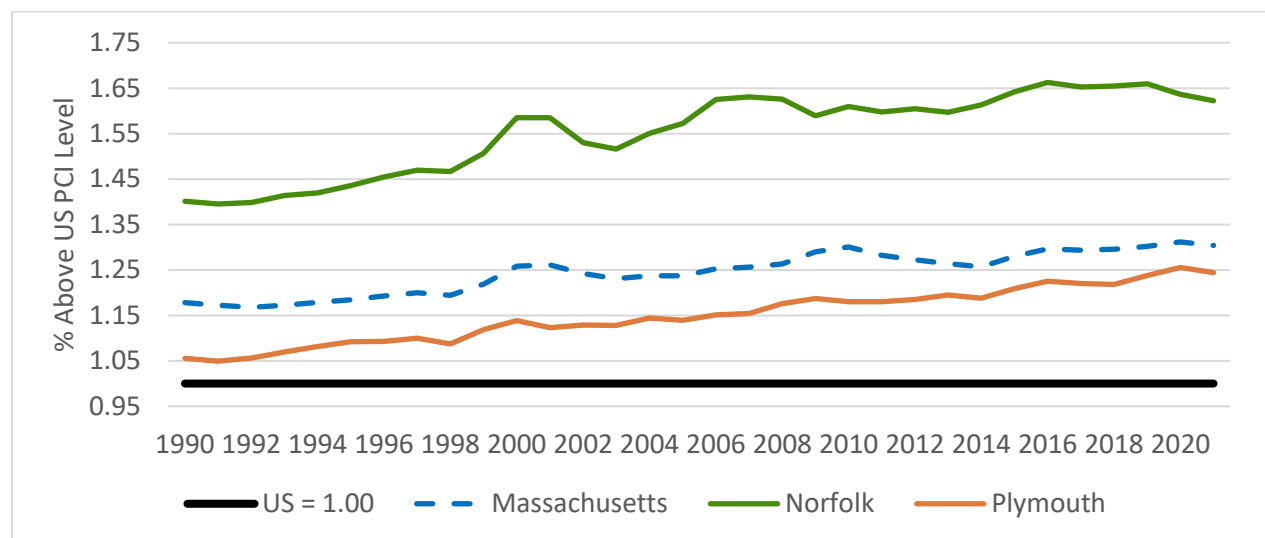
**Table 1 Population Growth by Race 2010-2020**

	U.S.	Massachusetts	Norfolk	Plymouth
White	-5,119,905 (-3%)	-235,903 (-5%)	-26,337 (-5%)	-8,422 (-2%)
Black or African American	2,254,490 (6%)	65,362 (17%)	12,982 (36%)	9,491 (28%)
Asian	5,153,595 (36%)	157,405 (45%)	30,615 (53%)	1,765 (30%)
Hispanic or Latino	11,602,450 (23%)	260,031 (41%)	16,106 (73%)	8,333 (53%)
Other	8,668,070 (127%)	236,644 (169%)	21,840 (168%)	24,985 (21%)

Source: U.S. Census Bureau 2020 Decennial Census

The largest change in population by race and ethnicity across all geographies between 2010 and 2020 was an increase in the Other category, which includes those that identify as a race not given as an option on the Census or Two or More races. **Table 1** above shows that there were increases across all race and ethnicity groups except the white population, which declined slightly in both counties. Since the white population share is much larger than the other race and ethnicity shares, a small percentage change represents a comparatively larger number of people than the other population changes. However, said losses were still easily made up for by growth in other population groups, particularly the Hispanic and Latino population, which grew over 50 percent in Plymouth and almost 75 percent in Norfolk over a very short period of time.

**Figure 6 Per Capita Income Index, 1990-2021**

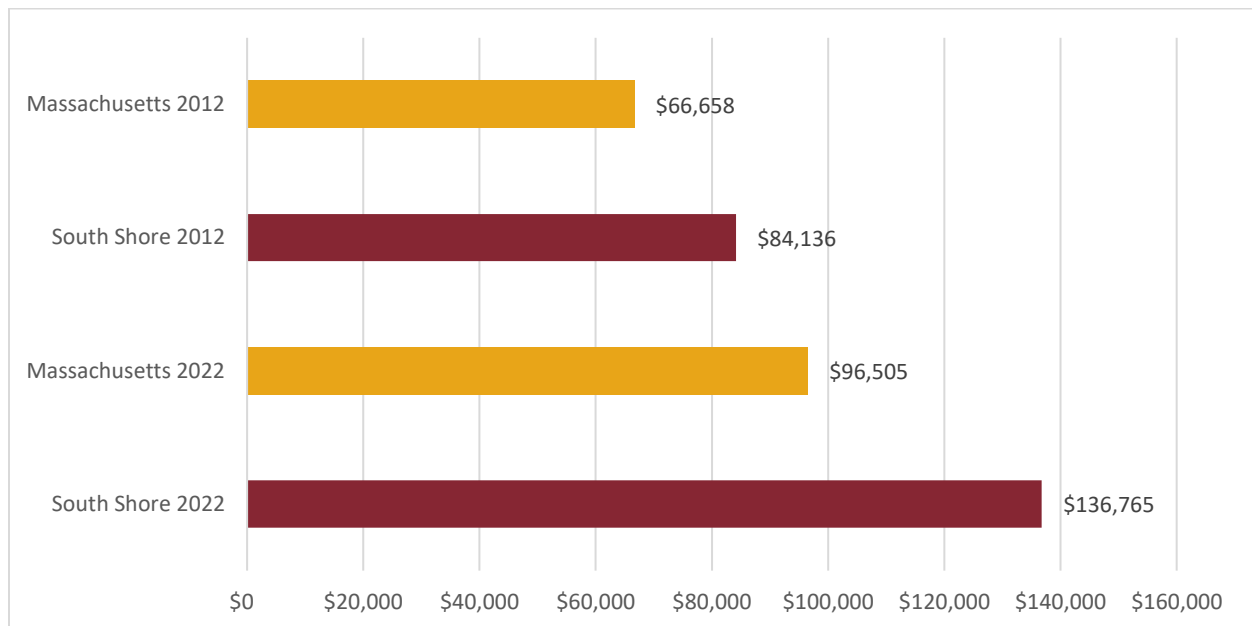


*Source: Bureau of Economic Analysis Per Capita Income*

The per capita income index, seen in **Figure 6** above, shows the percent difference between Massachusetts and the United States (=1.00 in the index) in terms of per capita income. Massachusetts is consistently trending above the US as a whole, increasing its income advantage significantly over the 30 years shown. In recent years Massachusetts has been vying with Connecticut as the wealthiest state in the country in terms of per capita income. The per capita income indices for Plymouth and Norfolk counties generally track with Massachusetts, though Norfolk County (amongst the wealthiest counties in the country) has an overall higher per capita income and Plymouth County is below Massachusetts, and both counties have been increasing faster relative to the country as a whole. The statewide and regional growth in per capita income represents a positive trend, economically, indicating longer-term shifts towards higher wage levels and accumulated wealth.

Plymouth County median incomes by city and town are generally higher than the state averages, but Brockton is large and significantly lower, leading to the trend seen in Figure 7. The diverse demographics of Plymouth County (a county that also includes affluent communities like Duxbury, Marshfield, and Scituate) make it difficult to use it as a stand in for South Shore, but again some data is only available at the county level.

**Figure 7 Median Household Income 2012 and 2022**



*Source: U.S. Census Bureau. American Community Survey, ACS 5-Year Estimates*

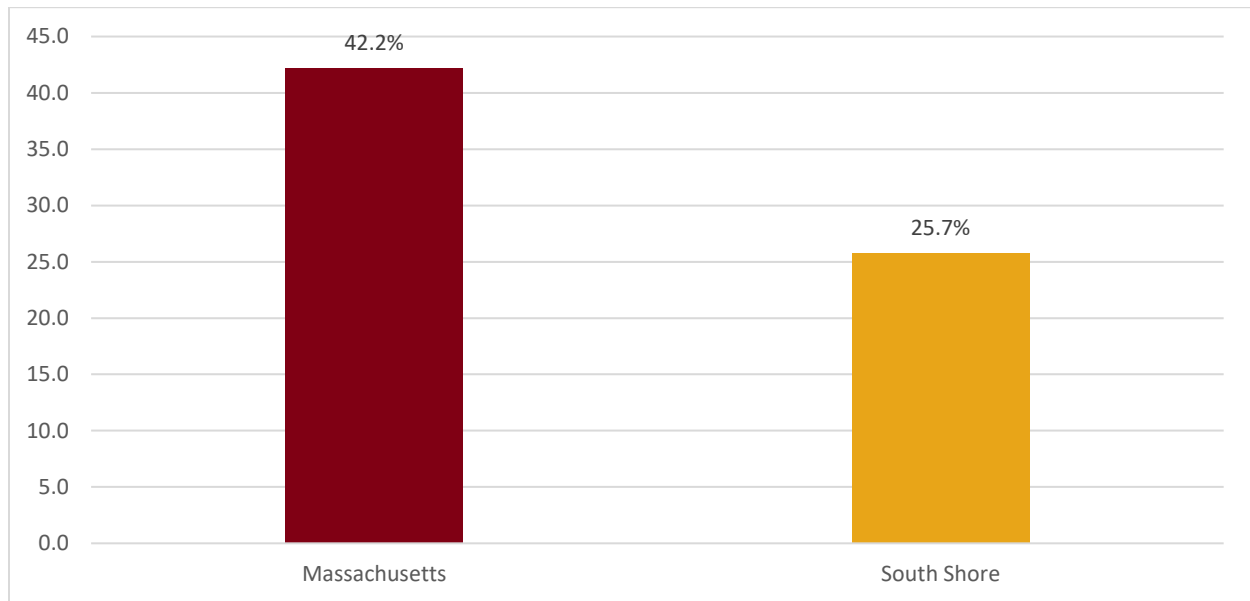
South Shore saw rapid growth in Median Household Income between 2012 and 2022, with income growing 63 percent from \$84,136 to \$136,765. Median Household Income in the state overall is much lower and grew only 44 percent from \$66,658 per year to \$96,505 per year.

## Education

---

The South Shore region consistently demonstrates strong K–12 performance, as evidenced by relatively low shares of low-income students, higher-than-average graduation rates, and lower dropout rates compared to both the state and the nation. At the same time, the region varies significantly in postsecondary educational attainment, with different outcomes across its two counties.

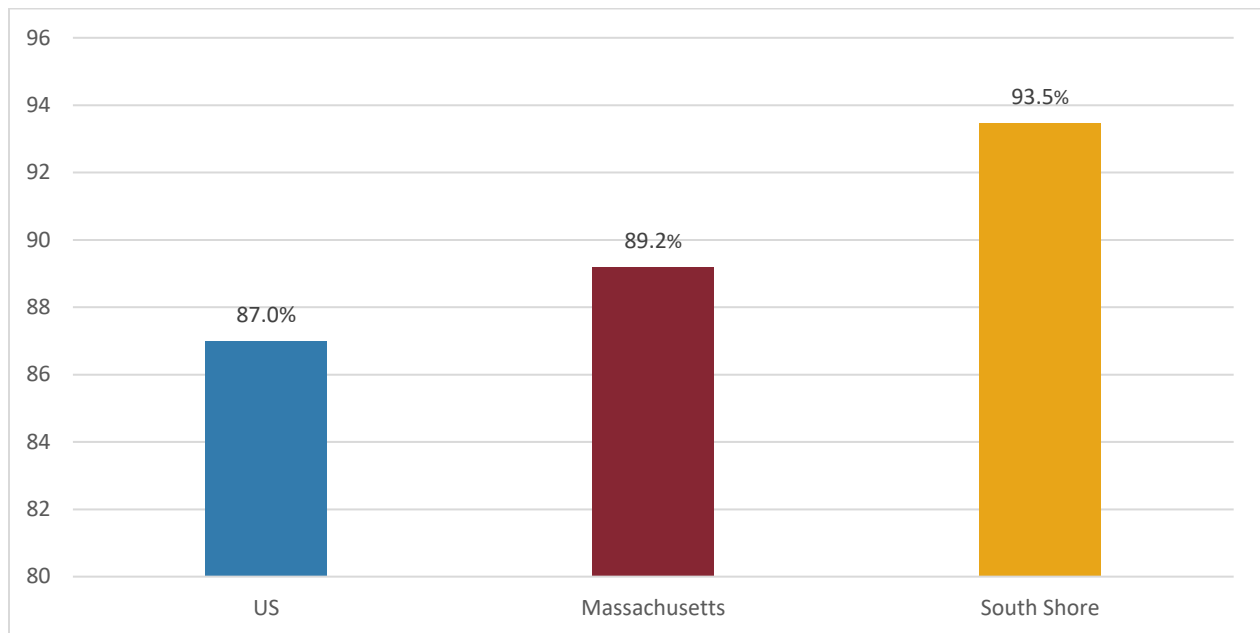
**Figure 8 Share of Low Income Students in 2022 – South Shore Compared to Massachusetts**



*Source: Massachusetts Department of Elementary and Secondary Education*

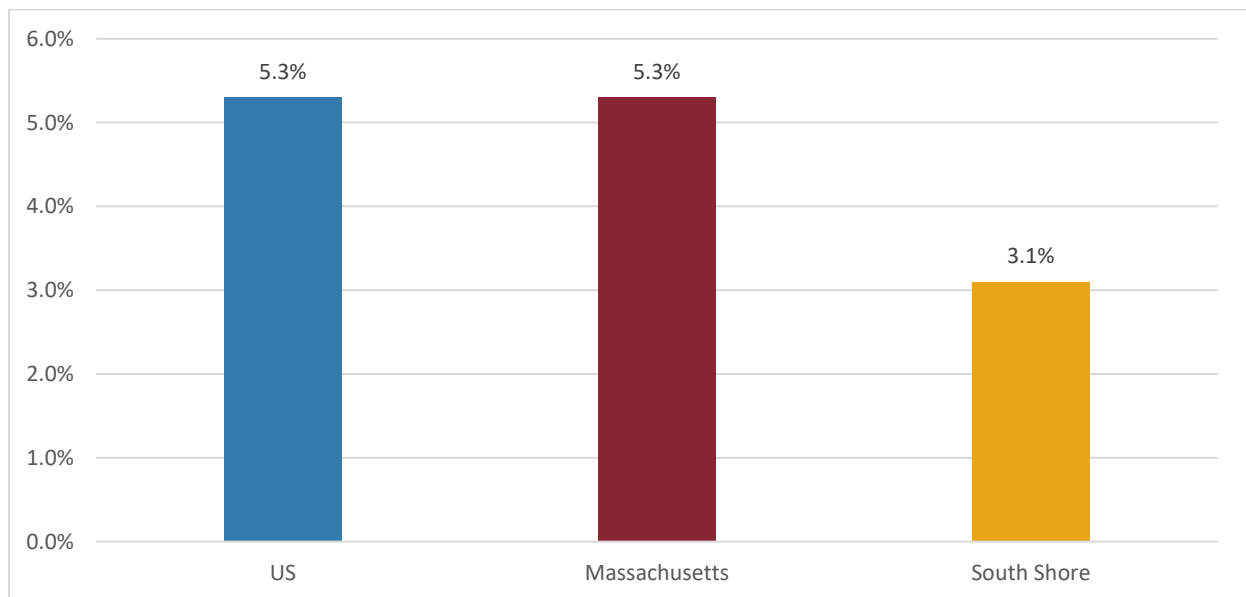
The share of low-income students in the South Shore region is just over a quarter of the student population. This is significantly lower than the state overall at 42 percent. This makes sense with the relatively high median incomes of most of the towns in the region.

**Figure 9 Graduation Rates by Region, 2022 – South Shore Compared to Massachusetts and U.S.**



*Source: Massachusetts Department of Elementary and Secondary Education, National Center for Education Statistics*

**Figure 10 Dropout Rate by Region, 2022**

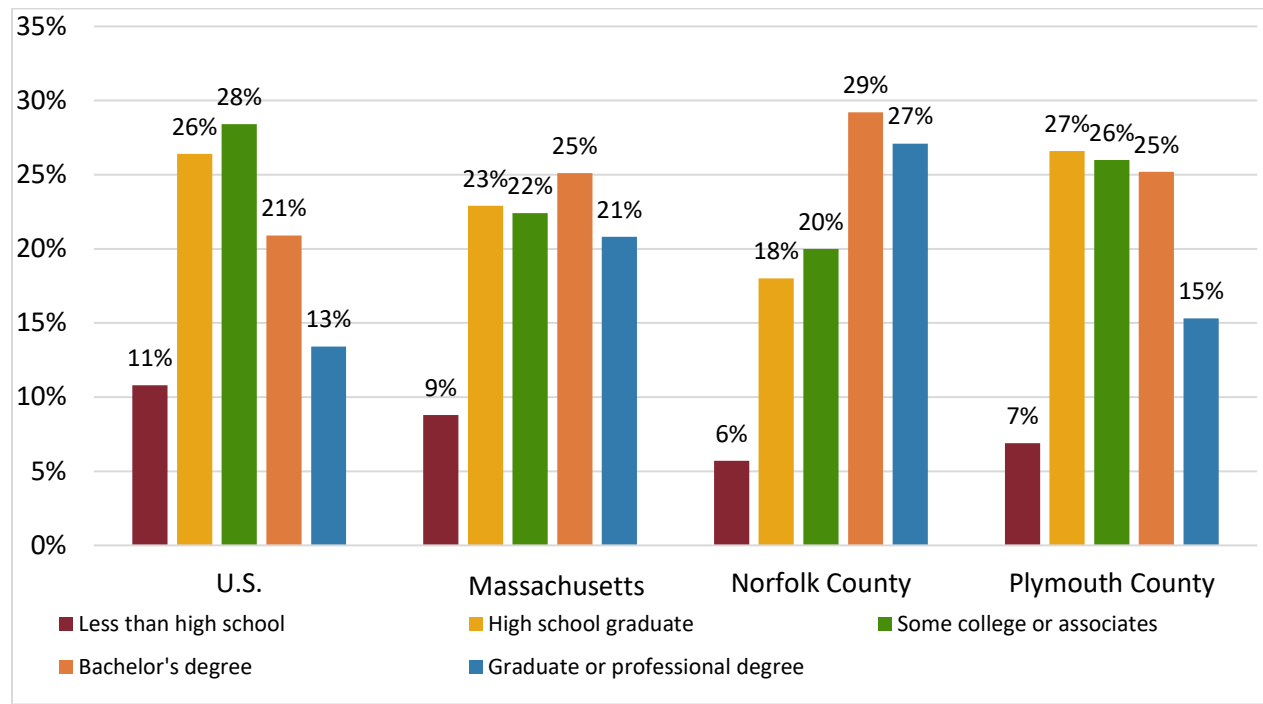


*Source: Massachusetts Department of Elementary and Secondary Education, National Center for Education Statistics*

The South Shore region has a high school graduation rate of 93.5 percent. This is four percentage points higher than the state as a whole and six percentage points above the national average as visualized in **Figure 9**. The relatively high graduation rate of the region combined with the low dropout rate shown in **Figure 10** below indicates high quality secondary schools. This is also reflected in the relatively higher

share of the population that are high school graduates in Plymouth and Norfolk counties compared with the nation and the state as shown in **Figure 11**.

**Figure 11 Educational Attainment by Region**



Source: U.S. Census Bureau. American Community Survey, ACS 5-Year Estimates

Norfolk County has higher educational attainment than both the state and the country, as shown by their relatively low shares of those with less than a high school education and high shares with a bachelor's degree or higher in **Figure 11**. Plymouth county has a smaller share of the population with less than high school, but lags behind Norfolk County and the state as a whole when looking at the percentage of the population with a bachelor's degree or higher. The main takeaway, however, is that both Plymouth County and Norfolk County are highly educated relative to the nation, indicating a workforce that is adaptable for high-skill professions.

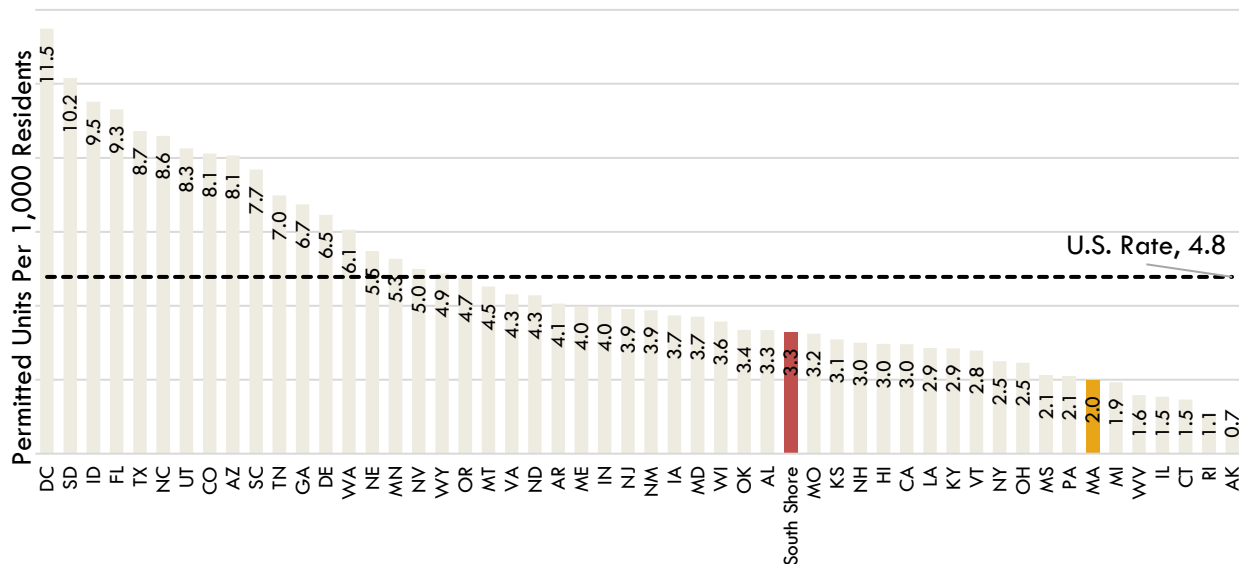


## Housing

South Shore's past and future demographic changes will require a comprehensive housing strategy to address specific needs for people at varying ages and life stages. Families and young professionals seeking high-quality schools need affordable, family-friendly housing options; meanwhile, an older population may require more specialized and accessible units to age in place. Ensuring that residents across all ages and income levels can find suitable housing is essential to sustaining the region's economic competitiveness, retaining a skilled workforce, and maintaining population levels. The need for an adequate supply of affordable housing has been identified, also, as a competitive deficiency for the state which is now being actively addressed (note that as statewide plan for housing, "A Home for Everyone: A Comprehensive Housing Plan for Massachusetts", was just released in early February 2025).

In this section, we examine how South Shore compares to state and national housing trends in areas such as building permits, rental costs, and home prices. Although the region permits new housing at a higher rate than Massachusetts overall, it remains below the national average, suggesting that more development may be needed for supply to better meet demand. Furthermore, the disparity in rent and home prices between Norfolk and Plymouth Counties represent challenges to any future housing goals, as a single region-wide, homogenous strategy may not serve an umbrella of needs.

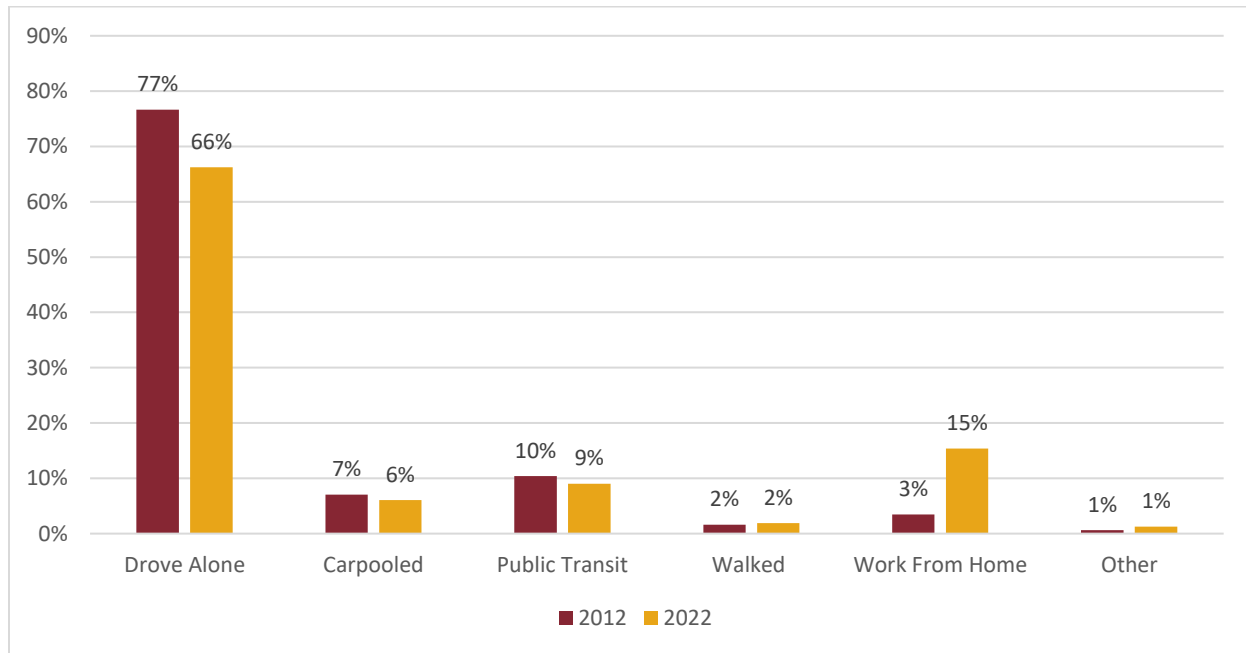
**Figure 12 Building permits per 1,000 Residents, 2023**



**Figure 12** shows permitted units to be built per 1000 residents for each state and the South Shore region with the U.S. rate as a benchmark. In terms of building permits per 1,000 residents, the South Shore region is lower than the national average, but higher than Massachusetts by a notable margin. This indicates that the South Shore region is developing its residential units at a higher rate than the state as a whole but still may be significantly behind where it needs to be to meet demand. The higher housing production rate, however, may also indicate that the South Shore may be better positioned than some

other parts of Massachusetts to further increase the supply of homes and address identified shortages in the state.

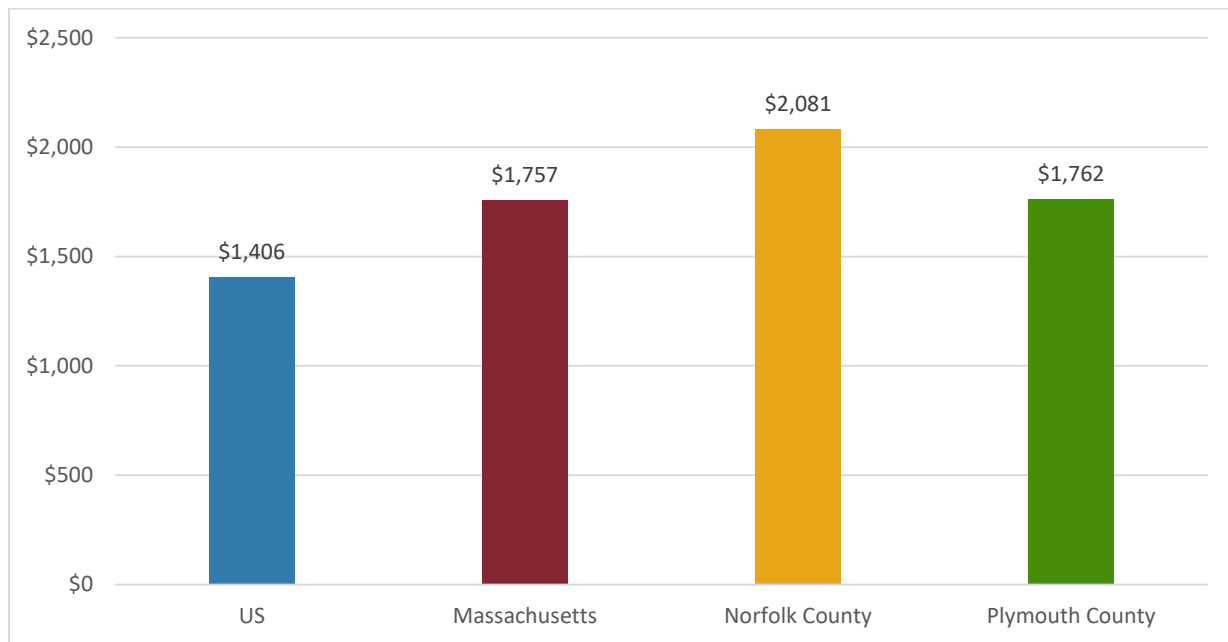
**Figure 13 South Shore Commute Modes of Transportation**



Source: U.S. Census Bureau. American Community Survey, ACS 5-Year Estimates

Reflective of its dispersed suburban land use patterns (with Quincy as an exception) and popularity as a place to live in Greater Boston, the South Shore favors vehicles as a means for getting to work. As seen in **Figure 13**, all commute modes of transportation have decreased in share from 2012 to 2022 in favor of working from home. The largest decrease was in driving alone, which dropped by 11 percentage points. The share of working from home had a large increase from 3 percent to 15 percent. This large change can be attributed to structural changes in how people work connected to the COVID-19 pandemic. From a policy perspective, working from home, while dissipating from its peak as people return to employer locations, is here to stay and the South Shore can develop strategies that focuses on providing community amenities that cater to those working from home or working in a hybrid-type fashion (e.g., three days a week at home and two days at the workplace).

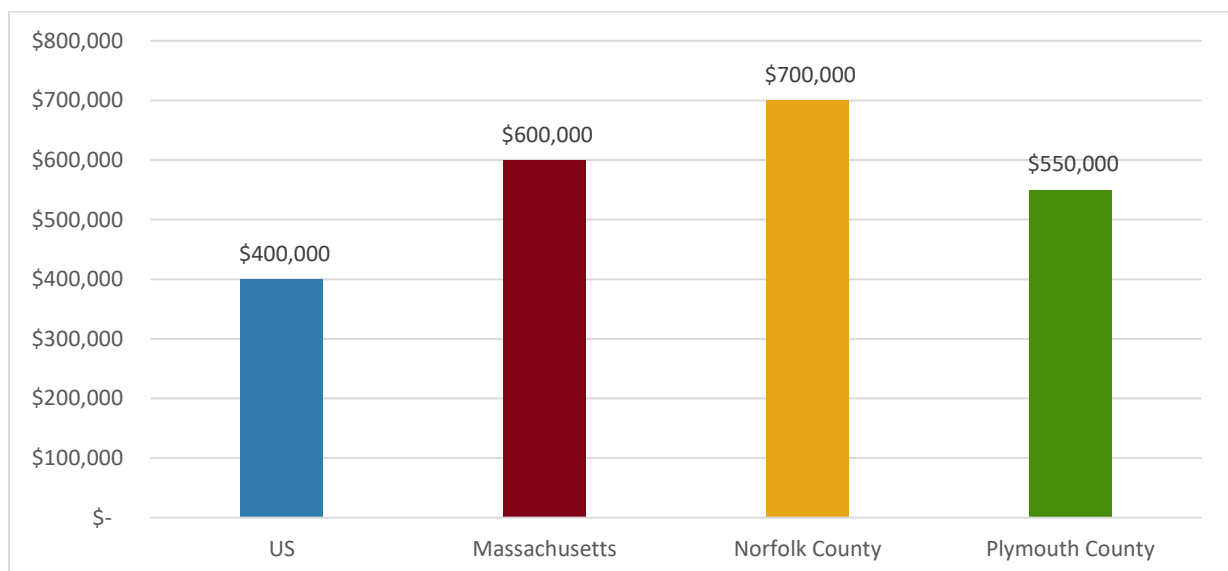
**Figure 14 2023 Gross Median Rent**



Source: U.S. Census Bureau. American Community Survey, ACS 1-Year Estimates

Housing affordability goes hand-in-hand with low levels of housing construction and the South Shore among U.S. markets is expensive for both ownership and renting, as shown in **Figure 14**. Massachusetts, Norfolk County and Plymouth County have higher median rents than the U.S. overall. Plymouth County is within ten dollars of the state median, while Norfolk County is over three hundred dollars higher.

**Figure 15 2023 Median Single Family Home Sales Price**



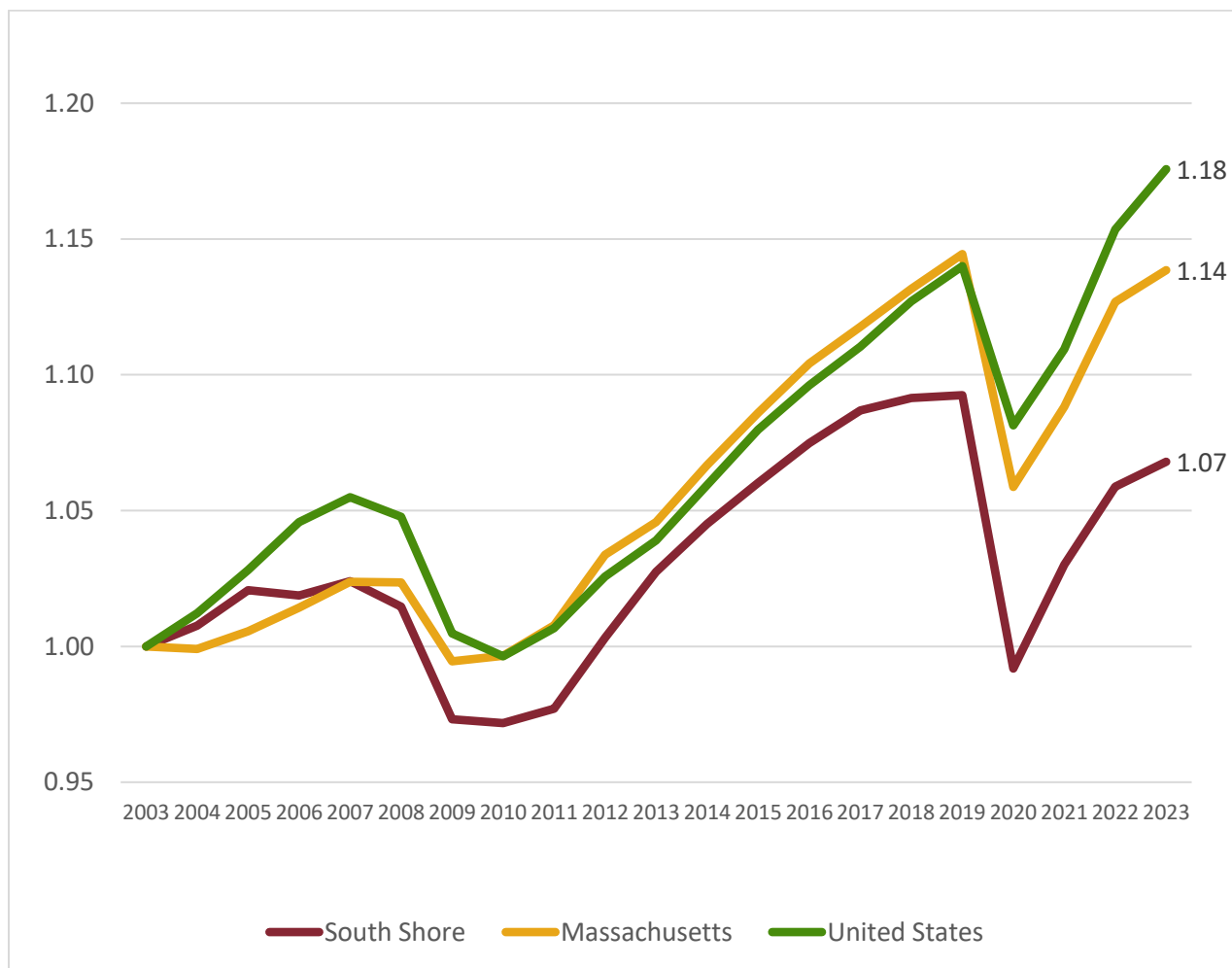
Source: Warren Group, Massachusetts Association of Realtors, National Association of Realtors

Massachusetts as a whole had a median single family home price of \$600,000, which was over \$200,000 higher than the national median. As shown above in **Figure 15**, Norfolk County's median single family home price was \$100,000 higher than the Massachusetts median at \$700,000. Plymouth County was slightly lower than the Massachusetts median at \$550,000, indicating that prices in much of South Shore may be slightly more affordable than in other parts of the state. In conjunction with higher levels of home building permits, the more affordable prices further underscore that Plymouth County in particular may be an outlet for increasing housing supply in the region and state.

## Shore Economy – Income and Industry Characteristics

The Massachusetts South Shore forms part of the greater Boston metropolitan area, one of the largest economies in the United States. The region generally follows state and national cycles in economic growth but has a distinct economy of its own with a particular concentration in finance and insurance and construction. South Shore's overall jobs growth has been somewhat slower than the state's and nation's since 2013 but still experienced steady growth during the 2010s. However, the pandemic hit the region particularly hard, with employment in 2020 dropping to near 2008 recession levels. South Shore has also been much slower to recover, with employment in 2023 still below pre-pandemic levels.

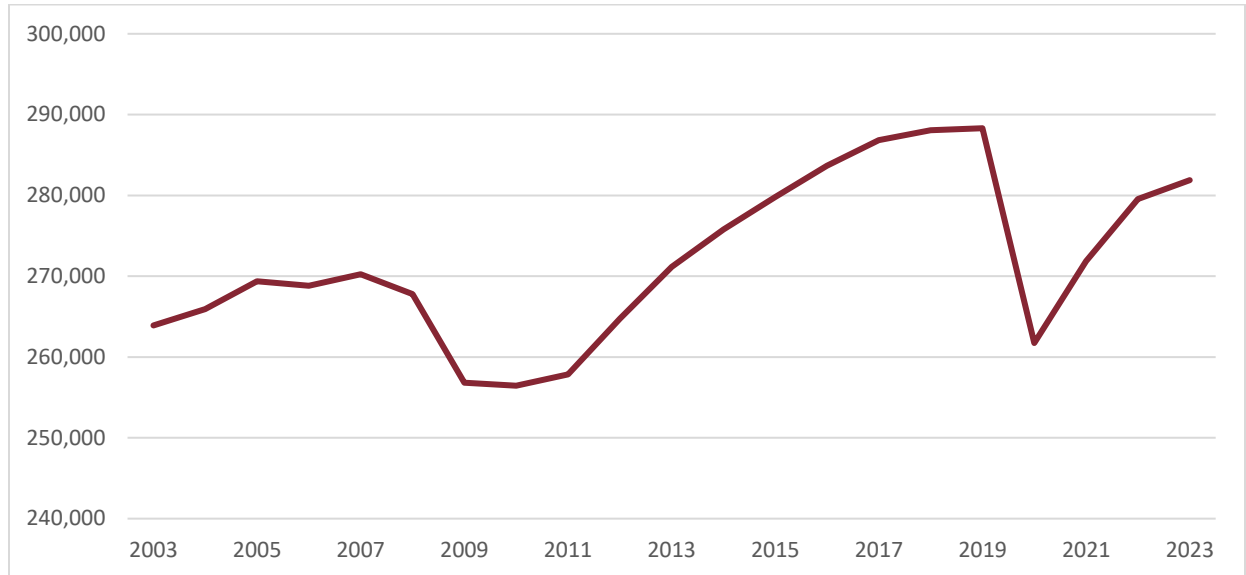
**Figure 16 Job Growth Index 2003-2023**



Source: Lightcast

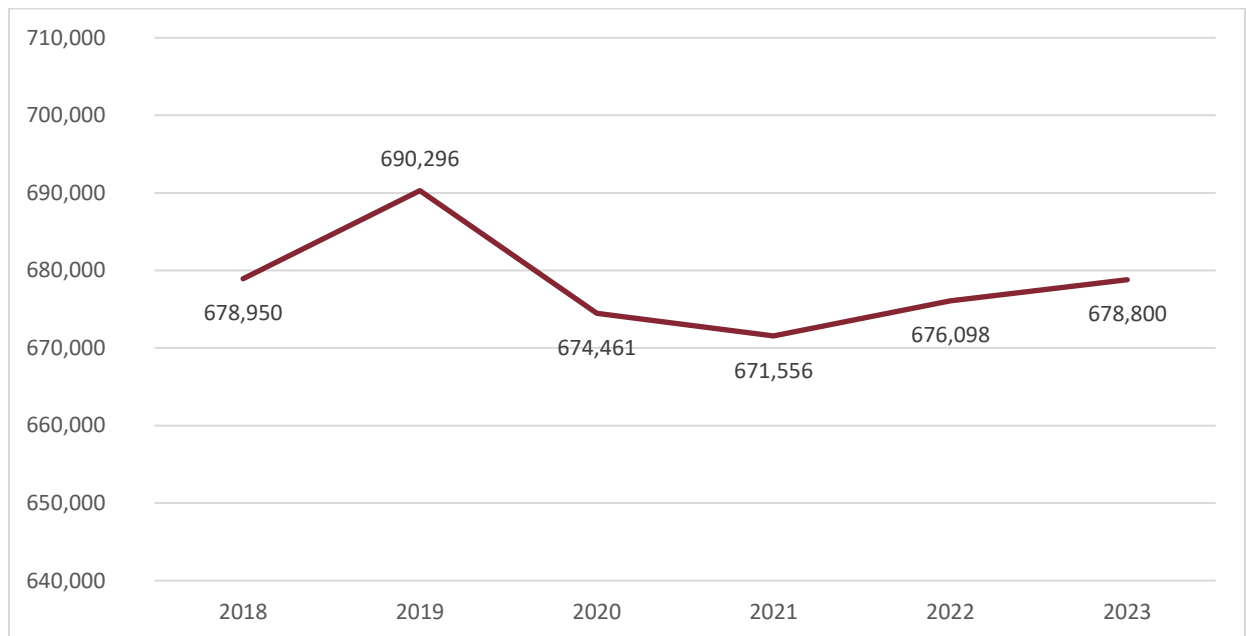
In terms of absolute numbers, **Figure 17** below shows that employment peaked at just under 290,000 in 2019 before dropping to just above 260,000 during the pandemic. Recovery has been slow, with current job numbers in the South Shore hovering just above 280,000.

**Figure 17 Employment in South Shore**



Source: Lightcast

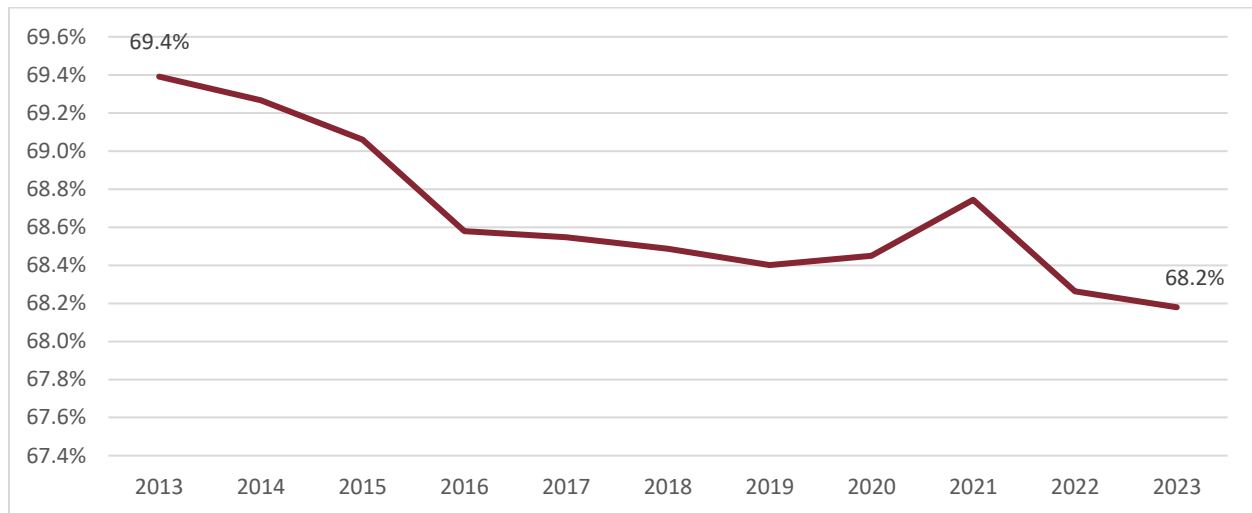
**Figure 18 Labor Force Size: Norfolk and Plymouth Counties Labor Force, Annual Average 2018-2023**



Source: U.S. Census Bureau. American Community Survey, ACS 5-Year Estimates

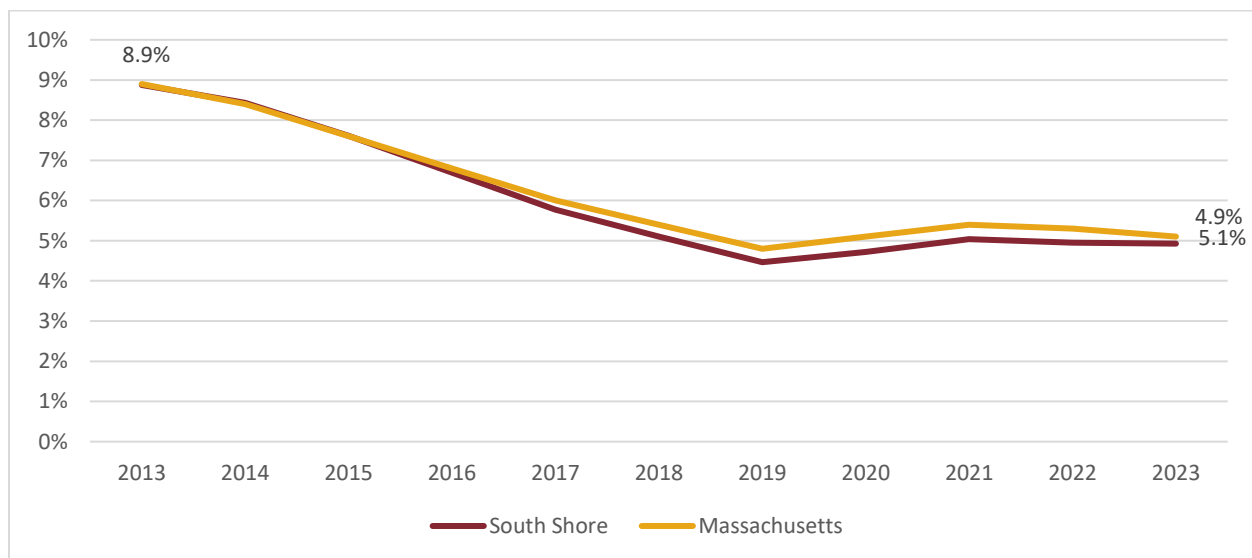
The labor force in Norfolk and Plymouth Counties peaked in 2019 before declining rapidly during the pandemic and has yet to recover to 2019 levels. **Figure 19** below shows that labor force participation rate was on a slow but steady decline between 2013 and 2023, other than a small bump in 2021, and fell just over one percentage point during the decade. However, labor force participation in the region is still significantly higher than the state overall despite the small decline.

**Figure 19 South Shore Labor Force Participation Rate, 2013 to 2023**



Source: U.S. Census Bureau. American Community Survey, ACS 5-Year Estimates

**Figure 20 South Shore Unemployment Rate, 2013 to 2023**

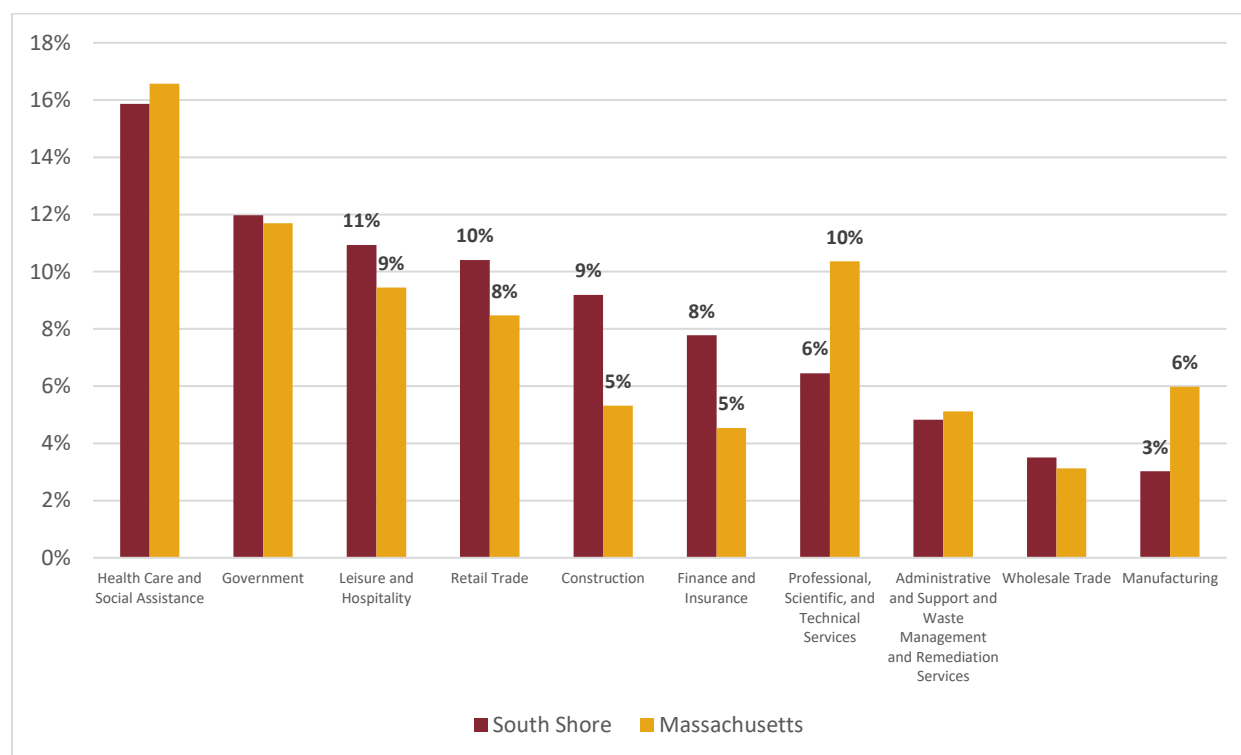


Source: U.S. Census Bureau. American Community Survey, ACS 5-Year Estimates

Note: Using ACS 5-Year data was necessary to obtain unemployment for South Shore. Because these rates are averaged over five years, they will be much higher than monthly BLS data.

The unemployment rate in South Shore declined gradually from 2013 as the US emerged from the Great Recession, hitting a low of 4.5 percent just before the pandemic. Unemployment has been relatively flat since, changing by only half of a percentage point, and has maintained at around 2018 levels. Unemployment in Massachusetts overall has been slightly higher on average.

**Figure 21 South Shore Industry Mix Compared to Massachusetts, 2023**

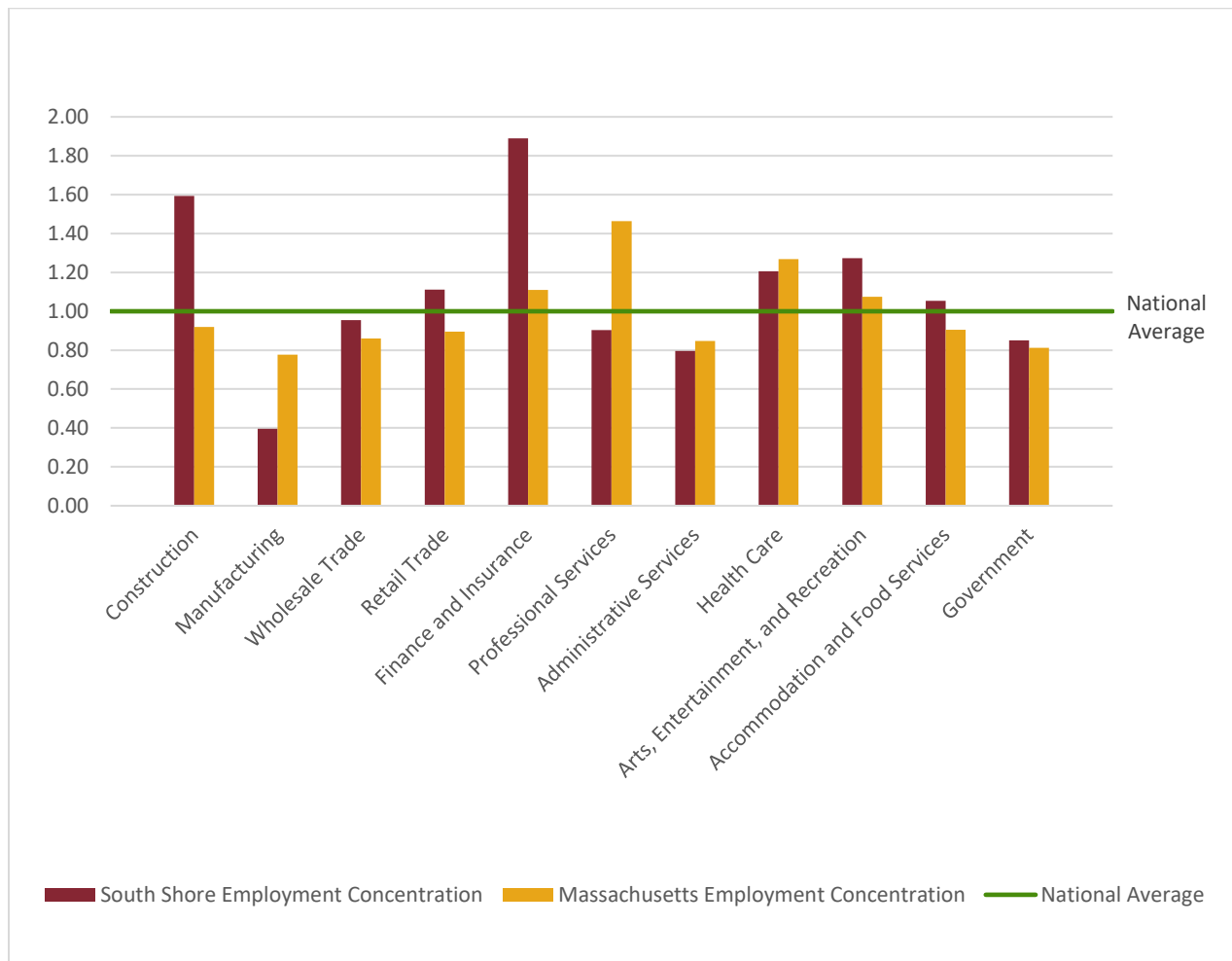


Source: Lightcast, industry mix based on jobs

South Shore holds a particular advantage over Massachusetts in the construction industry and finance and insurance, with construction employment making up almost double the percentage of the industry mix in the region compared to the state. Relatively large concentrations in construction, leisure and hospitality, and retail trade are indicative of a suburban region catering to residential needs and demands. The region's leisure and hospitality industry is further buttressed by coastal and history-related tourism. **Figure 21** shows that most other industries are relatively comparable, though the state holds a significant advantage in the industry sectors most connected to the tech economy, especially in professional, scientific, and technical services, as well as in manufacturing (note that manufacturing is diverse, ranging from food products to pharmaceuticals and semiconductors, and that Massachusetts, overall has a particular concentration on the high tech side of manufacturing).



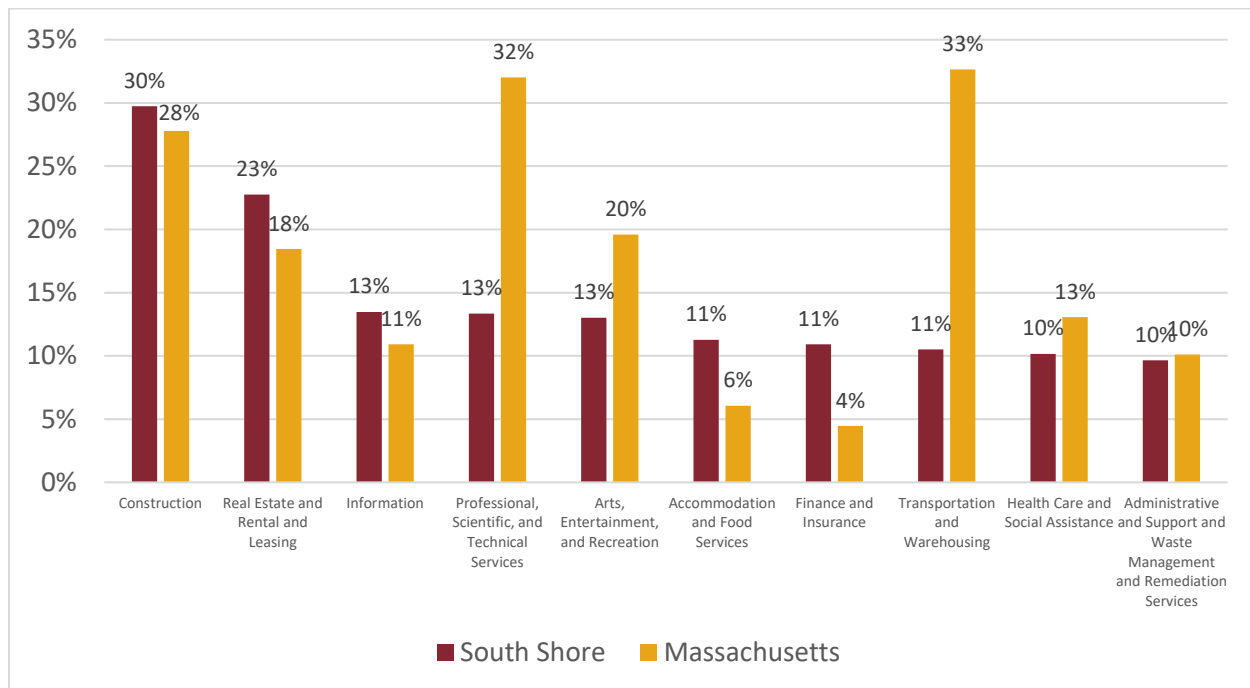
**Figure 22 South Shore Industry Concentrations (Location Quotients) Compared to Massachusetts, 2023**



Source: Lightcast

Location quotient, in this case specifically employment concentration, is calculated by comparing an industry's share of regional employment with the same industry's share of national employment. South Shore exceeds the national average in construction, retail trade, finance and insurance, health care, arts and entertainment, and accommodation and food services. As mentioned earlier in the study, this ties to an economy generally focused on residential needs as well as tourism. **Figure 22** above shows that the two standout sectors are finance and insurance and construction, both of which are typically export industries when they have high location quotients, indicating that they are bringing outside money into the region.

**Figure 23 Growing Industries in South Shore, 2013-2023**



Source: Lightcast

The construction sector in South Shore saw substantial growth across the board between 2013 and 2023. Commercial construction jobs led the way with over 50 percent growth (adding 600 jobs), followed by infrastructure-related construction, which grew nearly 40 percent (200 jobs). Residential construction also expanded, with single-family housing jobs increasing by 10 percent (80 jobs), and multifamily housing seeing an impressive 150 percent growth—although this translated to just 42 new jobs. These trends generally align with statewide patterns, though single-family housing construction in South Shore far outpaced the state, where growth was only 1 percent.

Growth in real estate and rental leasing was largely driven by commercial and equipment leasing rather than residential property activity. The information sector experienced rapid expansion, led by Software Publishers, which grew by 90 percent, adding over 1,000 jobs. A significant increase was also seen in businesses providing internet services to homes and businesses (180 percent growth, 640 jobs), likely linked to the broader construction and real estate boom in the region.

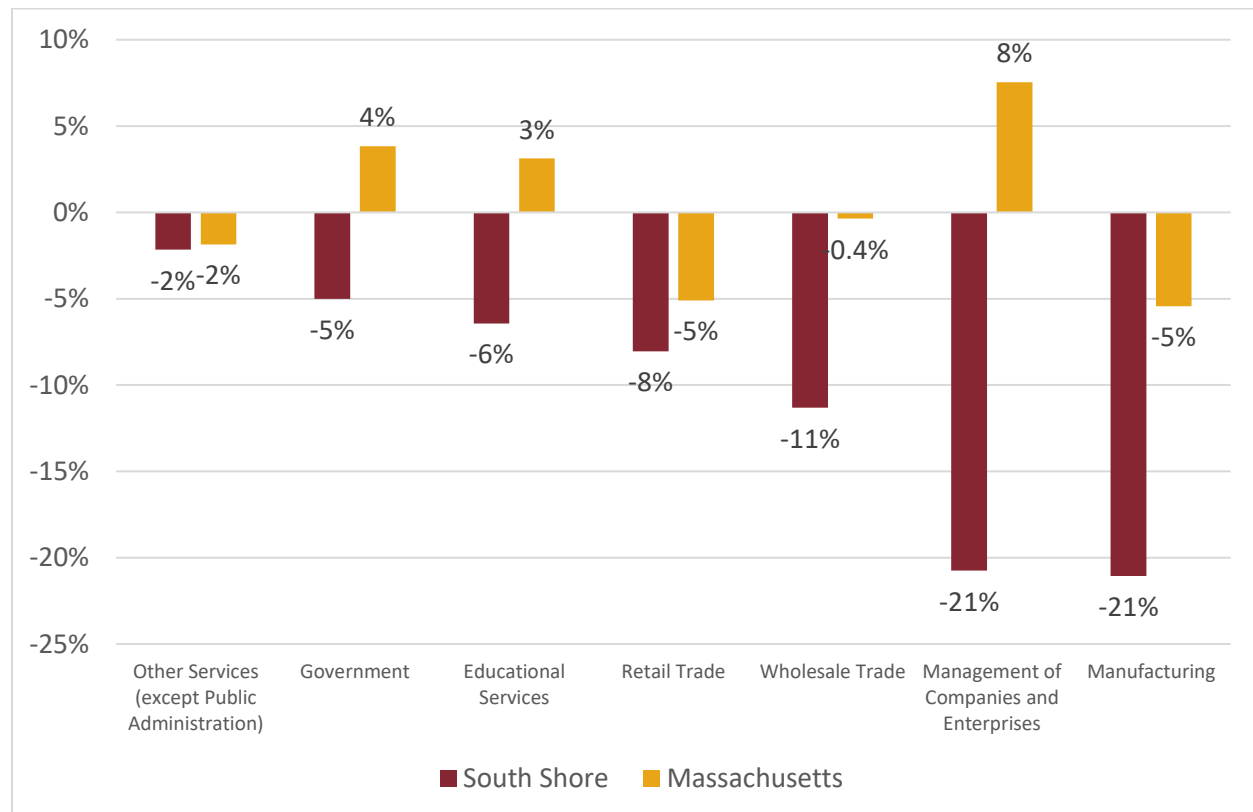
In professional, scientific, and technical services, South Shore's trends deviated notably from the state. While biotech jobs grew 90 percent (375 jobs) and research & development jobs rose 85 percent (200 jobs), these sectors remain relatively small, ranking 10th and 14th among subsectors. When looking at number of jobs, slower-growing consulting and legal firms dominate the region, whereas statewide, biotech and R&D are among the largest drivers of growth. Growth, however, in areas like biotech and R&D do indicate that the South Shore is participating in the growth of the Massachusetts tech economy.

In the finance and insurance sector, job growth was dominated by health insurance, which surged by 180 percent, adding 4,300 jobs. Statewide growth in the subsector was far smaller, with a net gain of only 2,700 jobs. This discrepancy suggests large-scale expansion or the possible relocation of a major health insurance company from a different part of Massachusetts to South Shore. Quincy, in particular, is home to a concentration of companies in finance and insurance, including Arbella Insurance, State Street Bank, and Blue Cross Blue Shield.

The South Shore's transportation and warehousing sector's growth focused on smaller-scale industries such as limousine services, courier operations, and local delivery, contrasting with statewide gains driven by larger-scale sectors like general warehousing, freight trucking, and air transportation. Arts, entertainment, and recreation saw moderate growth due to increases in jobs at amusement parks and country clubs. The 20 percent growth in the statewide sector was driven largely by gambling legalization, which did not have a notable impact on the South Shore industry mix.

Health care and social assistance closely mirrored statewide trends, though growth in South Shore was more concentrated in subsectors serving the elderly. In administrative services, the largest gains came from security guard and landscaping jobs, each adding over 500 positions, possibly tied to the expansion of country clubs and commercial developments across the region.

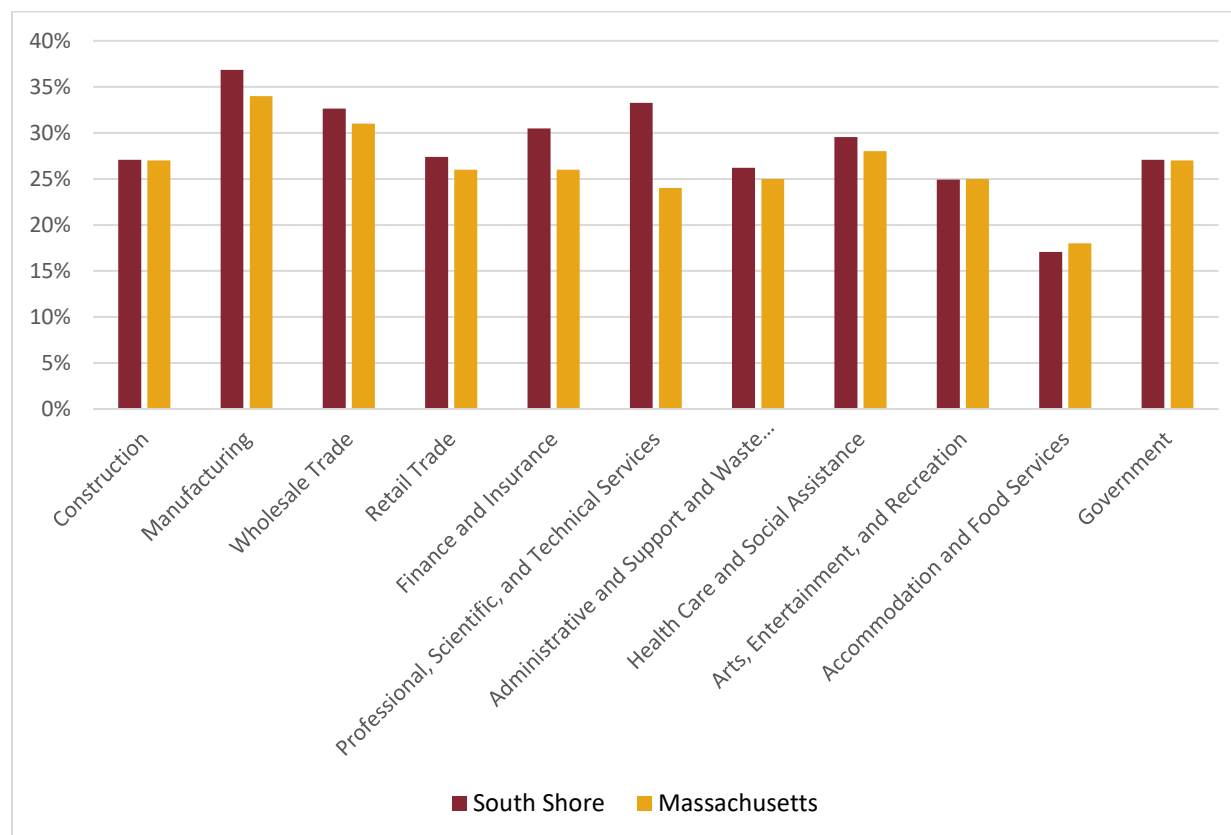
**Figure 24 Declining Industries in South Shore, 2013-2023**



Source: Lightcast

Most declining industries in South Shore saw parallel declines statewide, as shown in **Figure 24**, and those that did grow statewide (but shrank in the South Shore) typically grew by only small percentages. The most notable declines were in management of companies and enterprises and manufacturing, which saw more than 20 percent reduction in the labor force between 2013 and 2023. Declines were across the board, in both traditional manufacturing like textile mills and advanced manufacturing like electronics and computer products. As mentioned earlier in the study, the South Shore does not have a particularly high industry concentration in manufacturing. That said, manufacturing did see some growth in the region between 2013 and 2023 in discrete industries like sheet metals and breweries.

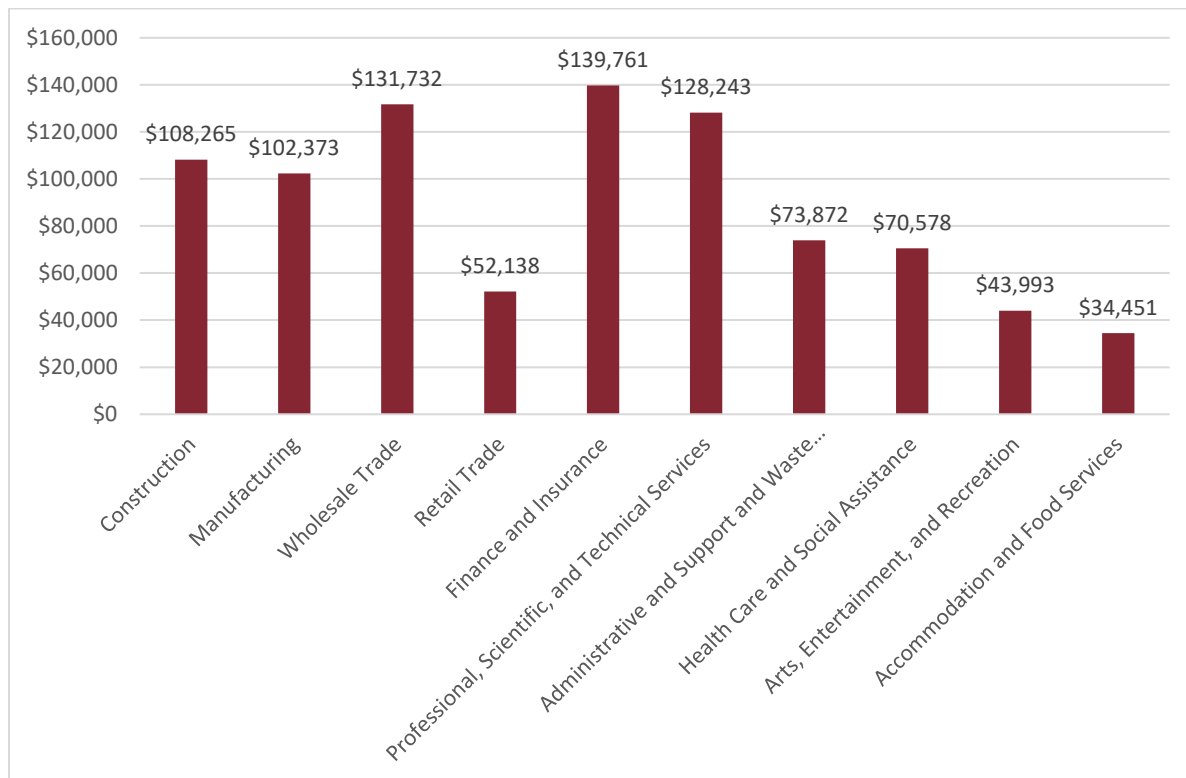
**Figure 25 Aging Workers - Share of Workers Age 55+ by 2 Digit Industry Sector, 2023**



Source: Lightcast

The South Shore workforce is generally older than the Massachusetts workforce, with 28 percent of workers over the age of 55 compared to 26 percent in the state overall. **Figure 25** shows that the most obvious difference is in professional, scientific, and technical services (an economic sector closely tied to the tech industry), with 33 percent of industry workers in South Shore over 55 compared to 24 percent in Massachusetts overall. This may be reflective of the difference in industry composition mentioned earlier, with older legal and consulting firms that dominate the regional industry tending to hire and retain older employees compared to the biotech and R&D firms that dominate the statewide industry.

**Figure 26 Average Earnings Per Job, 2023**



Source: Lightcast

Of the two industries that the South Shore holds a significant comparative advantage in, finance sees the highest average earnings per job, while accomodation and food services sees the lowest. However, **Figure 26** shows that half of the top industries in South Shore pay on average over \$100,000 per year, indicating that good jobs are available to qualified workers.

**Table 2 Top Employers in the South Shore for Jobs Postings**

Company	Total Postings (Dec 2023 - Nov 2024)	Unique Postings (Dec 2023 - Nov 2024)
South Shore Health	4,588	1,264
Beth Israel Lahey Health	2,901	1,226
CVS Health	5,600	1,178
Clean Harbors	3,093	904
State Street Corporation	2,392	808
Signature Healthcare	3,112	684
GPAC	1,432	661
State of Massachusetts	1,406	657
Moderna Therapeutics	2,063	627
Walmart	1,379	618

Source: Lightcast

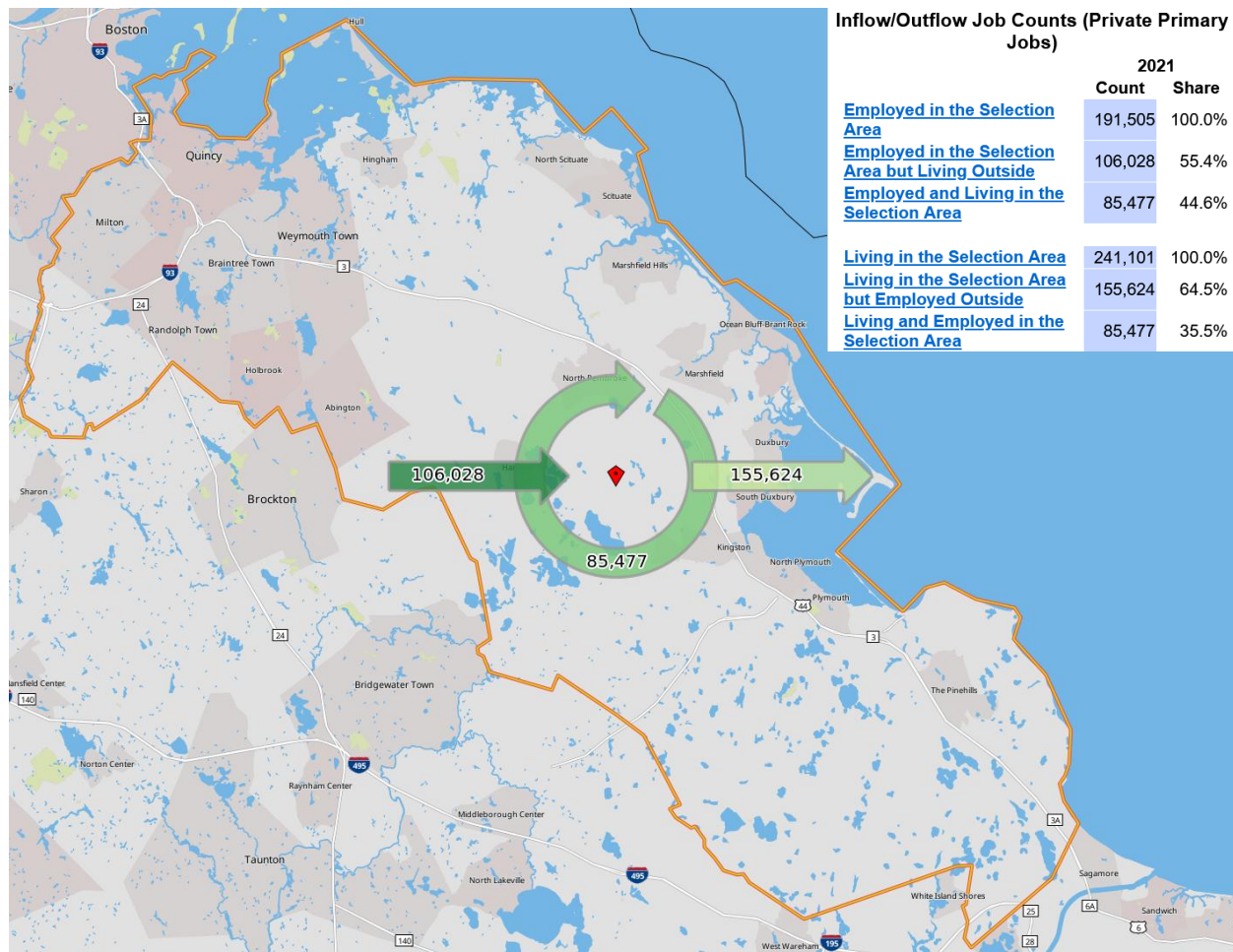
The health industry was the most active in the job market over the past year, making up the top three hirers and half of the top ten. Other notable hirers in **Table 2** include Clean Harbors, a waste management company; GPAC, a digital recruitment company; the State of Massachusetts; and Walmart.

**Table 3 Commute time, 2023**

County Name	Mean Commute Time (Minutes)
Norfolk County, MA	33.8
Plymouth County, MA	34.6

Source: U.S. Census Bureau. American Community Survey, ACS 1-Year Estimates

**Figure 27 Commuting Patterns in South Shore 2022**



Source: US Census Bureau, OnTheMap

The majority of employed residents of South Shore work outside of the region, with nearly two-thirds commuting out of the region each day. However, the region still has a significant number of inbound commuters, which make up over half of the daily workforce in the region. This indicates that residents

are not commuting to places like Boston due to a lack of jobs, but are choosing to live on the South Shore and commute to employers that reflect their skills. The relative lack of professional, scientific, and technical services jobs, combined with the highly educated population, suggests that outbound (and likely highly educated) workers may be headed into Boston to work more highly skilled jobs, while lower skilled workers enter the region for jobs in health care, construction, and leisure and hospitality roles. This type of split is not unique to South Shore and is also visible in other suburban regions bordering Boston. The commuting patterns in the South Shore region underscore the region's desirability as a place to live, including its advantageous access to Boston and Route 95/128 employers. As discussed, earlier, there is a linkage for the South Shore to maintain and support this asset, including efforts with housing and community amenities for workers who are now more likely to be mixing work from home with work at employer locations. As seen in **Table 3**, commuting time across Norfolk and Plymouth was nearly the same, with under a minute of difference between the two, so ease of transportation likely has little influence on inflow or outflow.

## The Healthcare Sector in the South Shore as an Economic Development Opportunity

Healthcare is the South Shore's largest industry in terms of employment and among the fastest growing. Combined with the industry's sheer size in the region and its proximity to the world-class healthcare cluster in Boston, known for its research, teaching hospitals, and sophisticated medical care, the South Shore region can strategically align itself for future growth in both applied healthcare and life sciences.

The healthcare industry in the South Shore is strong relative to the national average, with an employment concentration<sup>1</sup> of 1.22 (indicates that the industry's share of employment in the region is 22 percent higher than the national average). The South Shore region has six major hospitals, three acute and three non-acute. Collectively, these hospitals employed over 4,300 people in 2023. Nursing and Residential Care Facilities, along with Social Assistance, have the largest comparative advantage, with employment concentrations of 1.62 and 1.75 respectively, and employing more than 20,000 people. Ambulatory Health Care Services, which include doctor's and dentist's offices, outpatient care centers, medical laboratories, and home health care services, employs more than 16,000 people, with an above average employment concentration of 1.24.

**Table 4 Healthcare Industry in South Shore**

Sub-Industry	2013 Jobs	2023 Jobs	2013 - 2023 % Change	2013 Employment Concentration	2023 Employment Concentration
<b>Healthcare and Social Assistance</b>	<b>38,624</b>	<b>42,396</b>	<b>10%</b>	<b>1.23</b>	<b>1.22</b>
Ambulatory Health Care Services	14,635	16,866	15%	1.29	1.24
Social Assistance	10,774	12,888	20%	1.86	1.75
Nursing and Residential Care Facilities	8,379	8,332	(1%)	1.47	1.62
Hospitals	4,836	4,310	(11%)	0.58	0.50

Source: Lightcast

In recent years, the expansion of healthcare and medical facilities has been driving economic growth in the South Shore. Boston-based hospitals, like Beth Israel Deaconess and Massachusetts General Brigham are diversifying their expansions and services from the traditional city center which is now benefiting the South Shore with the broadening and enlargement of available medical services. The availability of more affordable housing in the South Shore as compared to Boston and its inner suburbs is an advantage for healthcare staffing—an issue that has become more pronounced since the onset of Covid-19 in 2020. As such, the South Shore can capitalize on the advantages it has for recruiting staff to facilitate the growth of healthcare and medical-related research in the region.

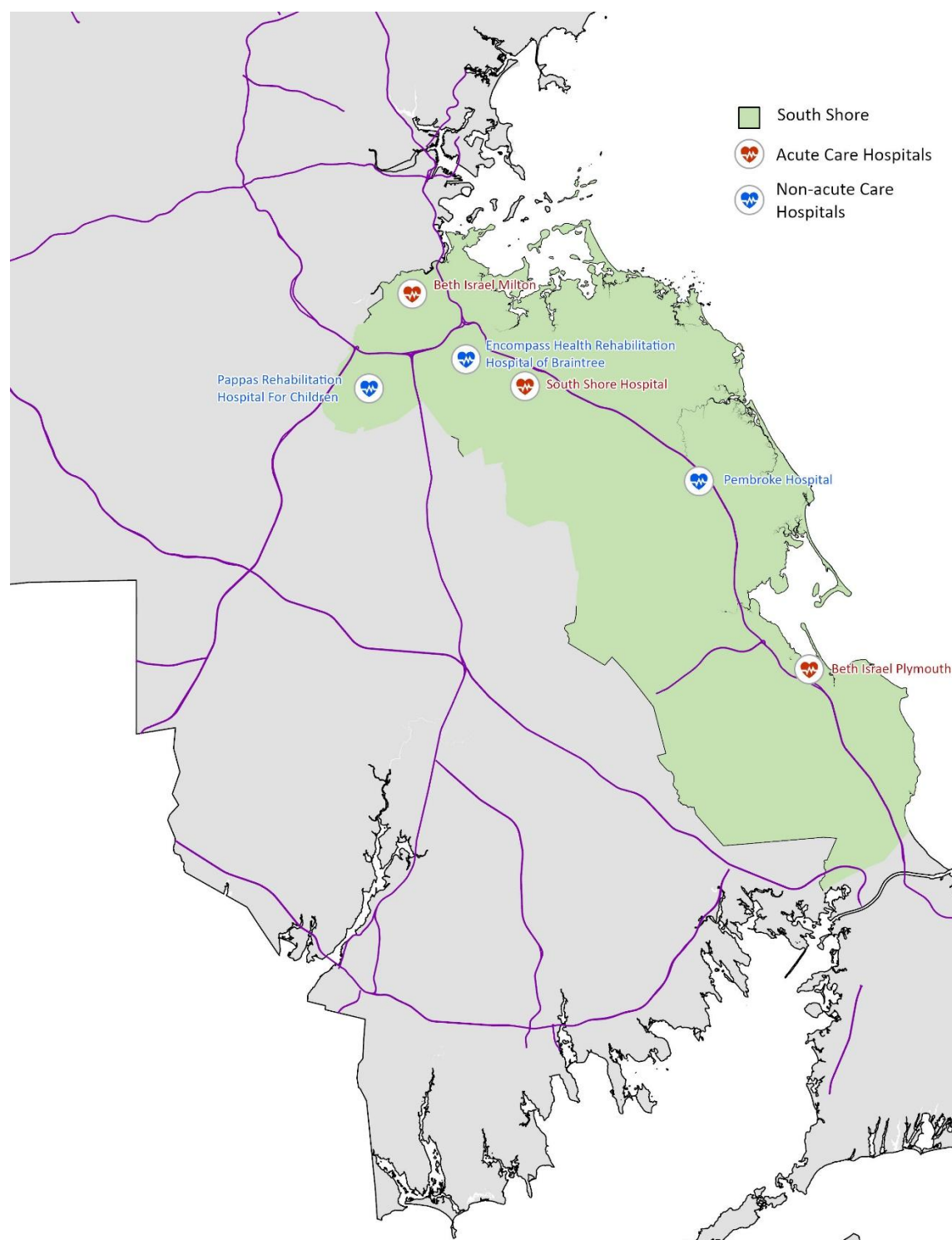
---

<sup>1</sup> Employment Concentration (also known as Location Quotient) quantifies the concentration of employed workers in a region relative to the national average. It can reveal what makes a particular region “unique” in comparison to the national average. For example, if the leather products manufacturing industry accounts for .02% of jobs in your area but .01% of jobs nationally, then the area's leather-producing industry has a concentration of  $.02 \div .01 = 2.0$  in your area (as compared to the nation). So in your area, leather manufacturing accounts for a larger than average “share” of total workers — the share is twice as big as normal.

---



**Figure 28 South Shore Hospitals**



As shown on the map in Figure 28, the principal medical facilities in the region are located along a spine stretching along I-93 and US-3 from Milton to Plymouth and benefit from their access to Boston whether by highway or rail (MBTA Red Line and commuter rail). The recent growth in medical facilities includes expansions at Beth Israel Deaconess Plymouth (including the development of a satellite facility at Cordage Park) and Beth Israel Deaconess Milton (a doubling in size of their emergency room). In the areas adjacent to the South Shore Hospital in Weymouth, a number of medical offices and specialty areas are available or have opened. The South Shore Hospital has clinical relationships and collaborations with Mass General Brigham which helps bring the most advanced care to the region, including being able to participate in advanced trial drug research which can benefit cancer patients. Medical providers either at South Shore Hospital or located nearby include the Dana-Farber Cancer Institute, Mass. Eye and Ear, Shields MRI, and Boston Children's Weymouth. With these offerings as well as the presence of numerous other medical specialty offices, parts of Route 18 in Weymouth have developed into a concentrated area of diverse medical services, including research.

The South Shore, in coming years, can continue to grow healthcare services and related life sciences industries through both the attraction and retention of skilled labor (with housing, transportation, an identifiable healthcare services cluster, and proximity to Boston all seen as pluses for the region) as well as taking advantage of its available building sites for housing and commercial development. Unlike the inner urban core of Boston, the South Shore has acreage and shovel-ready sites to accommodate expansion in both housing and industry which would feed into the further development of healthcare and related industries in the region. Locations like Union Point in Weymouth can accommodate both housing (single and multi-family) and commercial development (e.g., medical devices, pharmaceuticals, and life sciences related research). Healthcare can be seen as an economic development opportunity for future growth as well as a community service in the Massachusetts South Shore region.

## Progress on 2014 Policy Priorities

---

When judging progress on the key takeaways noted in the 2014 study, a one-to-one comparison is difficult due to the lack of a survey in our study. However, we were able to pull out five main measures of progress that align with said takeaways and compare data between them to give a picture of the changing policy landscape in South Shore over the past decade.

### REGIONAL IDENTITY & COHESION

- The population remains clustered in the northern part of the region, with Quincy containing 1 in 6 residents.
- The two counties that the region stretches across, Norfolk and Plymouth, have large differences in educational attainment and housing costs.

### WORKFORCE & ECONOMY

- White collar industries, a key focus of the 2014 study, show mixed results. Finance and Insurance jobs are highly concentrated in the region, but Professional, Scientific, and Technical Services jobs lag far behind the state overall and are even below the national average. This is particularly striking given the region's proximity to Boston, one of the most highly concentrated regions for Professional, Scientific, and Technical Services in the country.
- The population is ageing and along with it the workforce. South Shore already has a higher share of workers age 55+ in every industry other than Accommodations and Food Services, and the population is projected to become more concentrated around the retirement age by 2050.

### AFFORDABILITY & HOUSING

- Housing costs remain a concern. While Plymouth County overall shows similar or even slightly lower housing costs compared to the state overall, Norfolk County, in which Quincy is located, is significantly more expensive than the state average.
- While relatively more building permits are issued in South Shore compared to the state overall, the rate is still well below the national average.

### EDUCATION QUALITY & DISPARITIES

- We saw consistently high-quality K-12 education in the region compared to the 2014 study, indicating the region has made progress in this metric. Norfolk County continues to have much higher educational attainment on average than Plymouth County when looking at post-secondary education. Plymouth County is, however, far more educated than the U.S. average.

### TRANSPORTATION & MOBILITY

- Average commuting times for Norfolk County and Plymouth County, identified as a key issue for the region in the 2014 study, have increased slightly in both counties. Census data shows that the average commute time for Norfolk and Plymouth in 2013 were 32.9 minutes and 32.3 minutes, respectively. This increased to 33.8 and 34.6 minutes in 2023. The increase is not surprising, given the Boston area's recognized high levels of congestion.

## Appendix

---

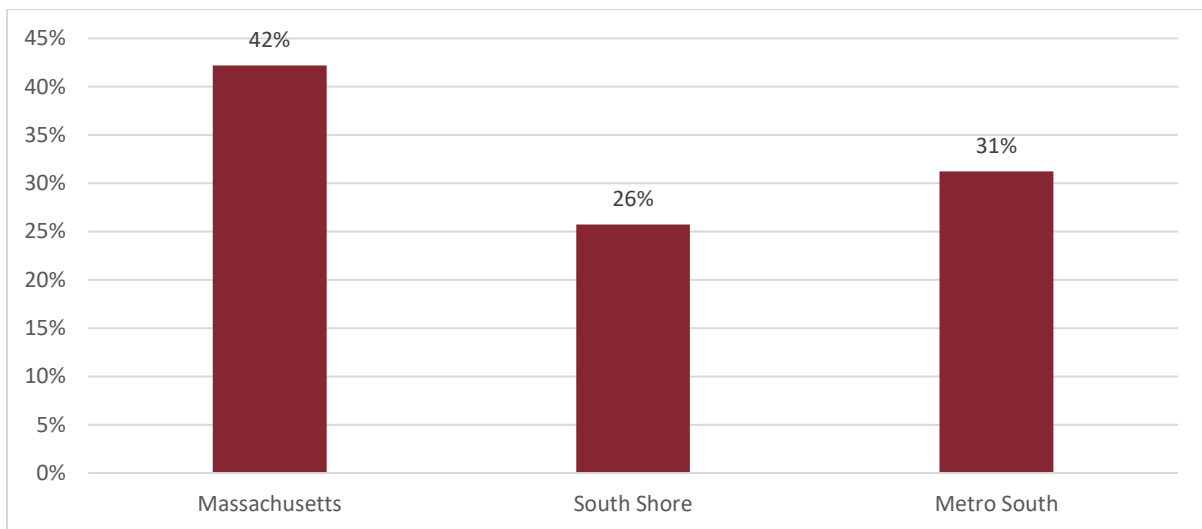
**Figure 29 Population Growth**

Location	Population Growth (2010-2020)	2010 Population	2020 Population
Massachusetts	8%	6,547,629	7,039,147
South Shore	7%	548,550	589,311
Metro South	9%	409,536	445,875

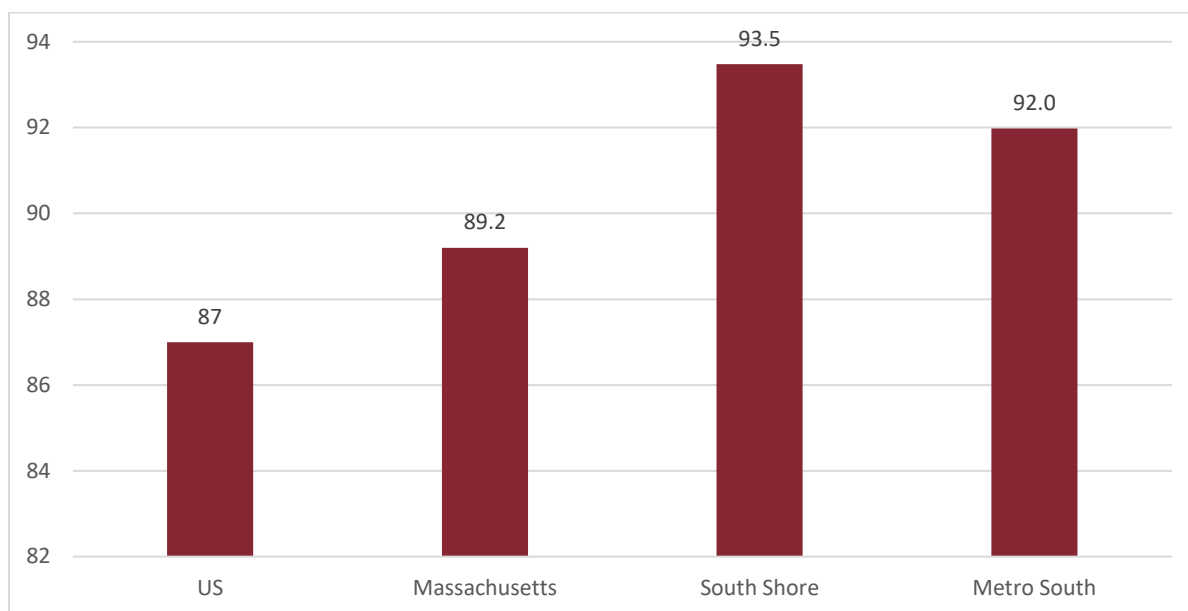
**Figure 30 Projected Population Growth**

Location	Projected Growth 2020-2050	2020 Population	2050 Projection
Massachusetts	-0.3%	7,039,147	7,021,497
South Shore	-1.2%	589,311	582,408
Metro South	3.9%	445,875	463,109

**Figure 31 Share of Low Income Students**



**Figure 32 Graduation Rate**



**Figure 33 Dropout Rate**

