The Greater Baltimore
State of the Region Report, 2005

Produced Jointly By:

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About the Greater Baltimore Committee
The Greater Baltimore Committee (GBC) is the region's business leadership organization. It develops public policies and serves as a catalyst for action and initiatives to strengthen the region's business climate. The GBC also serves as an advocate for business in government and civic venues. Its top strategic priorities for 2005-06 include building life sciences businesses in the region, developing a fast, easy and reliable transit system, and strengthening minority-owned businesses in the region.

About the Economic Alliance of Greater Baltimore
The Economic Alliance of Greater Baltimore is the regional business development and marketing organization that focuses on bringing jobs and capital investment to Baltimore City, Anne Arundel, Baltimore, Carroll, Harford, and Howard Counties. The Economic Alliance provides an array of services to companies interested in relocating to the Greater Baltimore region. Its core focus is to build business cases for companies that have a strategic incentive to establish a location in Greater Baltimore.

About the Baltimore Metropolitan Council
The Baltimore Metropolitan Council is an organization of the elected executives of Baltimore City and Anne Arundel, Baltimore, Carroll, Harford and Howard counties. It is committed to identifying regional interests and developing collaborative initiatives to improve the region's quality of life and economic vitality. BMC provides technical support to the Baltimore Regional Transportation Board, and is also engaged in economic and demographic research, computer mapping, air and water quality programs, cooperative purchasing and rideshare coordination.

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Introduction

The **Greater Baltimore State of the Region 2005** report examines the relative health and economic performance of our region as compared to a group of metropolitan economies throughout the United States.

This report is a follow-up to previous State of the Region Reports in 1998, 2000 and 2003. It is a joint initiative between the Greater Baltimore Committee, the region's business leadership organization, and the Economic Alliance of Greater Baltimore, the region's economic development corporation, and the Baltimore Metropolitan Council. The project was launched with counsel and input from The Johns Hopkins Institute for Policy Studies. This report offers baseline and follow-up information on key measurements of the region's economic health and business climate. Its purpose is to provide an objective look at our region's competitive advantages and challenges as we work to develop regional strategies for success in the national and global economies.

The U.S. Bureau of the Census definition of the Baltimore Primary Metropolitan Statistical Area (PMSA) is used in this report, and identifies Greater Baltimore as Baltimore City, and the surrounding counties of Anne Arundel, Baltimore, Carroll, Harford, Howard and Queen Anne's. The terms metropolitan area and region are used interchangeably throughout this report.

Since the purpose of this report is to provide a resource for strengthening the business climate of Greater Baltimore, data from the Greater Baltimore region and the Washington, D.C. region are measured separately. We recognize, however, that the two are also widely recognized as an economically powerful combined metropolitan statistical area that comprises the nation's fourth largest market and we support business and government teamwork to strengthen the business climate of the combined region.

The most up-to-date, nationally published data and information sources covering metropolitan regions have been used in this report. The results provide a context for framing key questions about our community. How does Greater Baltimore compare to other regions as a place to live, work and operate a business? What does the data suggest about where we are and where we are going? Is Greater Baltimore well-positioned to participate fully and competitively in the present and future economy?

Selecting Regions for Comparison

In 1998, to begin the research process we selected 20 metropolitan regions, including Baltimore, from across the country in order to compare a wide variety of factors that relate to the economy and quality of life. The metropolitan areas studied include some of the fastest growing, most dynamic regions in the U.S., along with some older metropolitan areas that are going through economic transition.

Metro areas studied in the 2005 State of the Region Report:

Atlanta, GA
Austin, TX
Baltimore, MD
Boston, MA
Charlotte, NC
Cleveland, OH
Dallas, TX
Denver, CO
Indianapolis, IN
Minneapolis-St. Paul, MN
Philadelphia, PA
Pittsburgh, PA*
Portland. OR
Raleigh-Durham, NC
Richmond, VA
San Diego, CA
St. Louis, MO
Seattle, WA
Tampa, FL
Washington, D.C.

***** Added in 2005. Beginning with this report, one change has been made to the original list of regions studied. Pittsburgh has been added to the list instead of Greenville-Spartanburg.

Many other regions met our criteria, but the final list was determined to be a representative and diverse national sample. The largest U.S. metropolitan areas, such as New York, Chicago, and Los Angeles, were not included because their sizes would dramatically skew the comparison.

This report presents a set of indicators published by credible third parties that are important to gauge the health and performance of urban regions. The indicators do not tell us why something is the way it is, nor do they provide a detailed explanation of the condition we are examining.

The *Greater Baltimore State of the Region* project brings together the goals and interests of the Greater Baltimore Committee, the Economic Alliance of Greater Baltimore, and the Baltimore Metropolitan Council. The three organizations share the belief that strengthening regional ties and collaboration will benefit the entire region.

The data in this report was compiled primarily by the Baltimore Metropolitan Council with assistance from McDearman and Associates, the Greater Baltimore Committee, and the Economic Alliance of Greater Baltimore. Production, composition and editing of this report was managed by the Greater Baltimore Committee. The data was reviewed and analyzed by McDearman and Associates and a team of staff professionals from the three organizations. The data was compiled between May 2005 and September 2005.

Major changes since 2003 State of the Region Report that affect data collection:

- New metro area definitions were developed by the federal government in 2003. This makes comparisons of metro areas in previous reports more difficult because most metro areas had counties added or taken away. The biggest change affecting this report is that the combined Raleigh-Durham region was split into two separate regions. Some of the charts presented in this report reflect data gathered using the 1993 regional definitions and are indicated as such.

- Employment data is now reflects the North American Industry Classification System (NAICS). Previously the Standard Industrial Classification System (SIC) codes were used. Because of these changes, employment figures cannot be compared with prior reports. The new data was first released in 2003 and covers years back to 2001.

- The Pittsburgh region was added to the list of regions studied for this report, as noted above. It replaces the Greenville-Spartanburg region, which was among regions studied in previous State of the Region reports.

Summary of Findings

OVERVIEW OF RANKINGS

Of the 96 categories measured in this report, the Greater Baltimore region achieved top five rankings in 21 categories (up from 18 in 2003). It ranked in the bottom 5 in 11 categories (down from 16 in 2003). Some factors, such as racial make-up, were not evaluated as being either strengths or weaknesses. Other factors where Baltimore ranked in the bottom 5 could also be considered strengths, such as land area and median home prices.

Baltimore Region's Top Five Rankings (among 20 benchmark regions studied)

- #1: Academic R&D expenditures
- #1: Best Hospitals 2005
- #1: Contributions to Charities
- #2: Physicians 2004
- #2: Number of Top 50 Cancer Hospitals
- #2: Low Number of Local Government Units
- #3: Office Vacancy Rate 2004 (low)
- #3 Median Home Price Growth
- #3: Change in Air Quality 2000 to 2003
- #3: Property Crime Rate Change
- #4: Per capita personal income growth 2001-2003
- #4: Education and Health Care employment (as percent of total)
- #4: Entrepreneurial dynamism, 2005 (combined Baltimore-Washington region)
- #4: Average Air Fare
- #4: Violent Crime Rate Change
- #5: Change in Office Vacancy Rate
- #5: Government employment (as percent of total)
- #5: Population density
- #5: High Tech employment, by state (per 100,000 population)
- #5: Wholesale and Retail Trade employment growth, 2002 to 2004
- #5: Heavy Rail Transit Ridership

Baltimore Region's Bottom Five Rankings (among 20 benchmark regions studied)

- #16: High school education attainment
- #16: Median Home Prices (signifies high demand, which could be considered a positive)
- #17: Land Area
- #17: Housing starts 2004 (however, this is driven by growth controls in area counties, which could be considered a positive)
- #18: Manufacturing employment (as percent of total)
- #18: Average Travel Time to Work
- #19: Manufacturing employment growth, 2002 to 2004
- #19: Government employment growth, 2002 to 2004 (could be viewed as a positive)
- #19: Air Quality
- #20: Violent Crime Rate 2004
- #20: Information employment (as percent of total)

Greatest Changes from the 2003 Report

Baltimore is changing much faster than most of its peer metro areas, resulting in a number of significant shifts in the rankings. The region is evolving from a reasonably priced market, to a wealthier, but higher-priced market. The region is also evolving from a manufacturing-based economy, to one driven by professional and business services and new business formation. Most of the negative changes relate to increasing costs.

Positive Changes in Rank

- Per Capita Income; from 11 to 7
- Per Capita Income Change; from 10 to 4
- Entrepreneurial Dynamism; from 13 to 4 (new source; old source no longer published; however, methodology is similar)
- Office Vacancy Rate, Metro; from 7 to 3
- Change in Office Vacancy Rate, Metro; from 10 to 5
- Charitable Giving; from 16 to 1 (new source)

Negative Changes in Rank

- Manufacturing Employment Growth; from 9 to 19
- Office Lease Rates; from 8 to 18
- Air Passenger Growth; from 1 to 10
- Cost of Living, from 1 to 15
- Median Home Price; from 11 to 16
- Health Care Costs; from 2 to 10

NOTEWORTHY TRENDS

Changing Dynamics and Greater Baltimore

Greater Baltimore's economy has strengthened over the past few years with above average gains in employment and increases in income and home prices that were among the highest in the nation. These advances were driven by a number of trends, including the rapid growth of post 9-11 Washington, D. C., rising demand for homes, and the desire of more people to return to center cities. Greater Baltimore and its center city surged into the new millennium with newfound energy, leaving its rust-belt peers of St. Louis, Pittsburgh and Cleveland well behind. While it continues to have issues related to crime, social problems and its industrial past, the data reveals that more appropriate peers for Baltimore over the next decade might be regions such as Denver, Seattle, and Minneapolis.

Growth and Development in Baltimore's City Center

A recent retail assessment revealed that Baltimore's city center is among the strongest in the nation, based on a critical mass of business, residents, visitors, facilities and institutions. Using a 1-mile radius from the city center, Baltimore ranks 8^{th} nationally for population with over 36,000 residents and 8^{th} for the number of households earning $75,000+ annually.

Billions of dollars are being invested in new development in Baltimore City with new condo towers, hotels, and townhouse communities sprouting up near downtown on the Inner Harbor, on the West Side, on the East Side around Johns Hopkins, and in the Canton/Highlandtown areas. These trends and activities have positioned Baltimore City to attract national retail and signature developers to serve the growing market and further solidify the region's city center as a top U.S. destination.

Good-bye Rust Belt

Baltimore is often compared to the so-called "rust-belt" cities of the Midwest, including Cleveland, Pittsburgh and St. Louis. The large industrial firms that dominated these cities in the past left a dual legacy in each: 1) strong health care, education and cultural institutions endowed by past earnings; and 2) brownfields, grime and extreme difficulty adapting to the ever-changing dynamics of the global economy. Each region is making valiant efforts to revitalize and grow, however Baltimore is emerging from the pack and is well ahead of these 'peer' regions in many respects. Consider these facts:

- *Population Growth:* While Greater Baltimore realized average annual population growth that was just below the U.S. average from 2002 to 2004, Cleveland (19^{th}) and Pittsburgh (20^{th}) actually realized losses in regional population.

- *Employment Growth:* Average annual employment growth from 2002 to 2004 was above the U.S. average in Greater Baltimore, placing the region 10^{th} among the 20 benchmark regions. However, St. Louis (17^{th}), Cleveland (18^{th}) and Pittsburgh (19^{th}) all realized losses.

- *Manufacturing Towns:* Baltimore has made the transition from a 'manufacturing town' to a diversified industry and services hub. Among the 20 benchmarks, Cleveland (14.2%) continues to have the highest proportion of its workforce in manufacturing. St. Louis (10.9%) and Pittsburgh (9.1%) also rank among the top 10. Greater Baltimore places 18th among the 20 metros at only 6%, however much of this base is in high-tech manufacturing.

- *Highly Educated Population:* Greater Baltimore ranks 9th among the 20 benchmarks with 29.7% of the population having completed a bachelor's degree or more. In St. Louis (17th), Cleveland (18th) and Pittsburgh (19th) the figure is less than 25%.

- *Downtown Resurgence:* As discussed above, Downtown Baltimore is booming in terms of residential growth and development. While St. Louis, Cleveland and Pittsburgh are attempting to follow much the same path as Baltimore, their efforts are not producing similar results. Using a 1-mile radius from the city center, St. Louis ranks last among the top 25 metro areas for population, with only 6,907 residents. Cleveland (8,975) and Pittsburgh (17,140) are also well behind Baltimore (36,000+).

City Population: 1 Mile Radius
2005 Estimate

Rank Among Top 25	City	1 Mile Radius Pop 2005 Est
1	New York	169,308
2	San Francisco	105,100
3	Chicago	70,427
4	Philadelphia	62,530
5	Los Angeles	56,217
6	Seattle	51,486
7	Boston	37,468
8	Baltimore	36,980
9	Denver	28,114
10	Minneapolis	26,501
11	Washington, D.C.	25,866
12	San Diego	24,429
13	Portland	20,565
14	Atlanta	19,675
15	Pittsburgh	17,140
16	Houston	16,298
17	Phoenix	16,171
18	Cincinnati	15,158
19	Miami	14,642
20	Dallas	12,854
21	Cleveland	8,975
22	Detroit	7,857
23	Tampa	7,663
24	Kansas City	7,568
25	St. Louis	6,907

Source: McDearman & Associates, Baltimore Retail Market Assessment, Downtown Partnership of Baltimore, October 2005.

- *Sprawl:* While the metro area of Baltimore, Pittsburgh and St. Louis have about the same populations, they are quite different in land area. St. Louis (8,648 square miles) and Pittsburgh (5,279 square miles) and two to three times the size of Baltimore (2,608 square miles). This sprawl and lack of density makes it more difficult to develop a prosperous city center.

- *Surging Air Traffic:* Greater Baltimore's airport (BWI) places the region 9th among the 20 benchmarks (25th nationally) for passengers with 20.8 million in 2004, and 10th for passenger growth at 9.5% from 2002 to 2004. While low-fare airlines Southwest and AirTran have been expanding in Baltimore, American downsized its hub in St. Louis, resulting in a –47.8% decline to only 13.4 million annual passengers in 2004. US Airways downsized its hub in Pittsburgh resulting in a –26.4% decline to only 13.3 million.

Emerging Region; Changing Image

Greater Baltimore's improved economic position, along with its official designation as a combined metro area with Washington, has served to improve the region's image as evidenced by high rankings in many recent national publications. Baltimore is now ranked among the top regions for everything from travel, to living single, to academic research. These 'outside' rankings reinforce the positive changes taking place in the city and region and serve to create momentum that Baltimore has lacked since the opening of the Inner Harbor. Recent national rankings and designations include:

- Top 10 Up-and-Coming Destinations. *Frommers 2005*
- #6 for Entrepreneurial Dynamism (Washington-Baltimore), *Entrepreneur Magazine 2005*
- #11 for Top Arts Destinations, *American Style Magazine 2005*
- #5 Best Cities for Singles (Washington-Baltimore), *Forbes 2005*
- #20 Top Cities for Leisure, *Cities Ranked and Rated 2004*
- #1 Best Hospitals (Johns Hopkins), *U.S. News & World Report 2005*
- #3 Top "Salary Value" Cities, Salary.com 2005
- 5 Best Big City Mayors, *Time 2005*
- Top 5 Innovations in American Government (CitiStat), 2005; CitiStat visits by over 50 cities with coverage in many major newspapers.
- #10 Favorite U.S. City for African-Americans, *Black Enterprise Magazine, 2004*

9-11 and the Growth of Greater Washington

Greater Washington has become one of the wealthiest, fastest growing regions in the nation. This growth is having a major impact on Greater Baltimore, as residents and businesses move to the area in search of homes and office space that provide easy access to the Washington market, without the higher associated costs.

A recent report conducted for the Greater Washington Initiative (GWI), *Information Technology, Communications and New Media*, clarifies the power of the Washington region and what is driving its success. While other high-technology regions, such as Boston (-149,400) and San Francisco/San Jose (-362,400) realized huge employment losses from 2000 to 2004, after the dot.com bust and 9-11, Greater Washington actually realized a gain of 112,300. Job growth has driven demand and prices for housing that is among the highest in the nation, with the median home price in 2004 at $350,000.

The presence of the federal government and the development of Greater Washington as a technology hub are driving the region's growth. The region has technology industry employment of over 330,000, driven by billions of dollars in new federal spending for homeland security, defense and enhanced government performance. Much of this money will be paid to private-sector IT contractors for systems integration. Washington is also one of the nation's top regions for telecommunications and internet service providers. These firms need to be near Washington to build relationships with thousands of potential federal government clients and to have access to key industry regulators. After the dot.com bust, many technology firms began to shift their focus from business to government, realizing that long-term viability requires a diverse client base.

Washington (and by association, Baltimore) has also become one of the nation's top biotechnology hubs. A 2002 report by the Brookings Institute determined that while 80 percent of states and regions are pursuing biotech firms as key attraction targets, only 9 metro areas have potential to be major players in the industry. The Washington-Baltimore metro area is among those markets, with the strongest concentration being in the Maryland suburbs of D.C.

BIOTECHNOLOGY CENTERS
2002

Rank	Region	Brookings Classification
1	Boston	Biotechnology Center
1	San Diego	Biotechnology Center
1	Raleigh	Biotechnology Center
1	Seattle	Biotechnology Center
1	Philadelphia	Biotechnology Center
1	**Washington-Baltimore**	**Biotechnology Center**
2	St. Louis	Research Center
3	Atlanta	Median Biotech Center
3	Austin	Median Biotech Center
3	Cleveland	Median Biotech Center
3	Dallas	Median Biotech Center
3	Denver	Median Biotech Center
3	Indianapolis	Median Biotech Center
3	Minneapolis	Median Biotech Center
3	Pittsburgh	Median Biotech Center
3	Portland	Median Biotech Center
3	Richmond	Median Biotech Center
3	Tampa	Median Biotech Center
4	Charlotte	No Significant Biotech

Source: Brookings Institution, 2002.
"Signs of Life: The Growth of Biotechnology Centers
in the U.S." Regions based on 1993 OMB definitions.

Greater Baltimore has for many years gained great advantage through its ready access to the Washington market, as evidenced by the large number of national not-for-profits that have chosen to locate here for access to D.C. decision-makers. As Washington grows and expands, new opportunities for growth and wealth creation are emerging for Baltimore through this relationship. Perhaps the greatest impact has been on Baltimore's real estate market, which realized home appreciation of 33.4 percent from 2002 to 2004. This places Baltimore among the nation's most rapidly appreciating home markets.

TEN LARGEST U.S. MARKETS
2003

	Core Based Statistical Areas	Population 2003	Total Personal Income 2003 (millions of dollars)	Retail Sales 2002 (millions of dollars)
1	New York-Newark-Bridgeport, NY-NJ-CT-PA	21,766,731	895,763	222,176
2	Los Angeles-Long Beach-Riverside, CA	17,262,730	544,782	169,132
3	Chicago-Naperville-Michigan City, IL-IN-WI	9,549,014	336,346	102,540
4	**Washington-Baltimore-Northern Virginia, DC-MD-VA-WV**	**7,909,664**	**326,848**	**86,657**
5	San Jose-San Francisco-Oakland, CA	7,154,350	319,123	82,570
6	Philadelphia-Camden-Vineland, PA-NJ-DE-MD	5,922,253	217,806	68,995
7	Boston-Worcester-Manchester, MA-NH	5,815,222	238,297	70,662
8	Dallas-Fort Worth, TX	5,784,645	194,305	63,953
9	Detroit-Warren-Flint, MI	5,415,338	190,987	62,261
10	Houston-Baytown-Huntsville, TX	5,176,061	177,361	53,020

Sources:
Population: U.S.Census Bureau
Personal Income: U.S. Bureau of Economic Analysis
Retail Sales: U.S. Census Bureau

KEY FINDINGS BY CATEGORY

Demographics and Market

- Population: With a metropolitan population of more than 2.5 million, Greater Baltimore continues to rank 10th among the 20 benchmark metro areas included in this study. The region's annual population growth rate was 0.8 percent from 2000-2004 compared to the national average growth of 1.1 percent.

- Per capita income: Greater Baltimore ranks 23rd nationally and 7th among the 20 benchmark metros for per capita income at $36,733.

- Per capita income growth: Greater Baltimore ranks 4th among the 20 benchmarks for per capita income growth. From 2001 to 2003, the region's income grew 2.6 percent.

- Housing starts: Greater Baltimore ranks 17th among the 20 benchmark metros for housing starts, even though demand in the region has risen dramatically.

Economy

- Total employment: Greater Baltimore ranks 10th among benchmark regions for total employment. While Greater Baltimore realized a 0.46 percent gain in average annual employment from 2002 to 2004, this still placed the region 9th among the 20 benchmarks and just above the U.S. average of 0.44 percent.

- Educational and health services: Greater Baltimore ranks 4th among the 20 regions for educational and health care services, with 16.2 percent of employment in these sectors.

- High-tech employment: Maryland ranks 5th for high-tech employment among states with benchmark regions and 2nd for change in high-tech employment.

Tourism

- Leisure and hospitality employment: Employment in Greater Baltimore's leisure and hospitality sector increased by an average annual rate of 2.2 percent from 2002-2004, ranking the region 7th among the 20 regions and exceeding the 2.1 percent rate for the U.S. as a whole. The Baltimore region's 8.7 percent leisure and hospitality employment in 2004 ranks it 14th, compared to a ranking of 15th in 2002.

- Hotel rooms: The Baltimore metro area added 2,032 hotel rooms between 2002 and 2005. The region's 27,164 hotel rooms ranks it 14th – the same as in 2002.

Commercial Real Estate

- Office vacancy rate: Greater Baltimore ranks 3rd among the study regions for office vacancy with an index of 13.9, moving up two spots from 2002 and four spots from 2001.

- Office market size: Greater Baltimore's office market size ranks 9th in this report and 19th nationally.

Education

- Academic research and development: Greater Baltimore moved into first place for research and development funding at academic institutions with $1.637 billion invested in 2003. Boston was 2nd, well ahead of third place Philadelphia.

- College attainment: Greater Baltimore's college education attainment rate in 2004 of 29.7 percent ranks the region 9th, an improvement of two places from its rank of 11th in 2000.

- High school attainment: The Baltimore region's 2004 high school attainment of 82.4 percent ranks 16th – the same as its ranking in 2000.

Transportation

- Air passenger growth: BWI Thurgood Marshall Airport grew its passenger base by 9.5 percent from 2002 to 2004, placing Baltimore 10th among the 20 regions from air passenger growth.

- Mass Transit Use: Greater Baltimore ranks 6th for mass transit use among the 20 regions, with more than 640 million passenger miles and 113 million passenger trips.

- Transit ridership: The Baltimore region ranks 5th in transit ridership per capita.

Quality of Life

- Cost of living: The most significant change for Greater Baltimore from the 2003 to the 2005 report relates to cost of living. Greater Baltimore dropped from 3rd place among the 20 regions to 15th.

- Median home price and change: The primary driver of Greater Baltimore's dramatic cost of living increase is the rising cost of housing. The region ranks 16th among the 20 benchmarks with a median home price of $239,600 in 2004.

- Health care cost: The region ranked 2nd among the 20 benchmarks in the 2003 report with average costs below the U.S. average. In this report, the region ranks 11th with costs 6 percent above the U.S. average.

- Arts destination: Two recent rankings placed Greater Baltimore among the top arts destinations. Greater Baltimore ranks 11th nationally and 9th among the 20 benchmarks in American Style Magazine's 2005 reader's poll. The region ranks 19th nationally, and 8th among the 20 benchmarks, in Cities Ranked & Rated 2004.

- Violent Crime: Despite a significant drop in violent crime, Greater Baltimore continues to rank last among the 20 regions for violent crime rates in 2004, according to FBI Uniform Crime Reports.

- Change in violent crime rate: Greater Baltimore ranks 4th among the 20 benchmarks for drop in violent crime with an average annual decline of 4.5 percent between 2001 and 2004.

- Air quality: While Greater Baltimore ranks 19th among the 20 regions for overall air quality, the region ranks 3rd for most improvement based on an EPA Air Quality Index.

- Charitable contributions: The Baltimore region ranks 1st among the benchmark regions for median total contributions received by the region's charities, according to data from Charity Navigator compiled in summer 2005.

State of the Region Report Data

DEMOGRAPHICS AND MARKET CHARACTERISTICS

Population

With a metropolitan population of more than 2.5 million, Greater Baltimore continues to rank 10th among the 20 benchmark metro areas included in this study.

The region's annual population growth rate of 0.8 percent from 2000-2004 continued to be slow when compared to the other benchmark regions and to the national average of 1.1 percent. Six regions experienced growth rates in excess of 2 percent, while Greater Baltimore was one of six regions that grew at annual rates of less than 1 percent. Meanwhile, the Washington, D.C. metropolitan area grew at a 1.8 percent annual rate.

Greater Baltimore's median age of 36.9 ranks it 15th among the 20 benchmark regions, compared to 17th from 2000. Median ages range from 32 in Austin to 40.8 in Pittsburgh. Greater Baltimore ranks 13th for percentage of population aged 20 to 64.

Greater Baltimore ranks 3rd for black population, 13th for Asian population and 18th for Hispanic population.

MEDIAN AGE
2000 and 2004

2004 Rank	Region	2004 Estimated Median Age	2000 Rank	2000 Median Age
1	Austin	32.0	1	31.2
2	Dallas	32.7	2	32.0
3	Atlanta	33.6	3	32.9
4	Raleigh	33.7	4	33.2
5	San Diego	33.8	5	33.2
6	Charlotte	34.5	6	34.1
7	Denver	34.7	8	34.2
8	Indianapolis	34.9	9	34.4
9	Minneapolis	35.2	7	34.1
10	Portland	35.4	10	34.8
11	Washington, DC	35.6	11	34.9
12	Seattle	36.0	12	35.2
	U.S.	36.0		35.3
13	Richmond	36.5	13	36.1
14	St. Louis	36.9	14	36.1
15	**Baltimore**	**36.9**	**17**	**36.3**
16	Philadelphia	37.2	16	36.2
17	Boston	37.3	15	36.2
18	Cleveland	38.0	18	37.2
19	Tampa	40.4	20	40.0
20	Pittsburgh	40.8	19	39.7

Source: Claritas

METROPOLITAN POPULATION
2000 AND 2004

2004 Rank	National Rank	Region	2004 Population	2000 Rank	2000 Population
1	4	Philadelphia	5,800,614	1	5,687,141
2	5	Dallas	5,700,256	2	5,161,518
3	7	Washington, DC	5,139,549	3	4,796,182
4	9	Atlanta	4,708,297	5	4,248,018
5	11	Boston	4,424,649	4	4,392,342
6	15	Seattle	3,166,828	6	3,043,885
7	16	Minneapolis	3,116,206	7	2,968,817
8	17	San Diego	2,931,714	8	2,813,833
9	18	St. Louis	2,764,054	9	2,698,672
10	**19**	**Baltimore**	**2,639,213**	**10**	**2,552,994**
11	20	Tampa	2,587,967	11	2,396,013
12	21	Pittsburgh	2,401,575	12	2,431,087
13	22	Denver	2,330,146	13	2,179,347
14	23	Cleveland	2,137,073	14	2,148,010
15	24	Portland	2,064,336	15	1,927,881
16	35	Indianapolis	1,621,613	16	1,525,104
17	37	Charlotte	1,474,734	17	1,330,407
18	38	Austin	1,412,271	18	1,249,763
19	46	Richmond	1,154,317	19	1,096,957
20	54	Raleigh	914,680	20	797,026

Source: Bureau of the Census, 2005

POPULATION GROWTH
1998-2000 vs. 2000-2004

2000-2004 Rank	Region	Average Annual Growth Rate 2000-2004	1998-2000 Rank	Average Annual Growth Rate 1998-2000
1	Raleigh	3.7%	2	5.2%
2	Austin	3.3%	1	6.6%
3	Charlotte	2.7%	6	4.4%
4	Atlanta	2.7%	3	4.9%
5	Dallas	2.6%	4	4.5%
6	Tampa	2.0%	7	3.1%
7	Washington, DC	1.8%	9	2.8%
8	Portland	1.8%	10	2.7%
9	Denver*	1.7%	5	4.4%
10	Indianapolis	1.6%	8	3.0%
11	Richmond	1.3%	12	2.4%
12	Minneapolis	1.2%	11	2.4%
	U.S.	1.1%		2.1%
13	San Diego	1.0%	17	0.9%
14	Seattle	1.0%	13	2.2%
15	**Baltimore**	**0.8%**	**16**	**1.5%**
16	St. Louis	0.6%	18	0.8%
17	Philadelphia	0.5%	15	1.6%
18	Boston	0.2%	14	1.6%
19	Cleveland	-0.1%	19	0.6%
20	Pittsburgh	-0.3%	20	0.3%

Source: Bureau of the Census.

*Denver's boundaries changed in 2001 when Broomfield County was created out of portions of Adams, Boulder, Jefferson and Weld Counties. 1998 data may not be precisely comparable to other years.

WHITE POPULATION
2004

Rank	Region	% of Population
1	Pittsburgh	89.5%
2	Portland	88.1%
3	Denver	87.9%
4	Minneapolis	86.4%
5	Austin	85.7%
6	Boston	85.2%
7	Tampa	84.7%
8	Indianapolis	82.4%
9	San Diego	79.9%
10	Seattle	79.4%
11	Dallas	79.3%
12	St. Louis	78.8%
13	Cleveland	77.1%
14	Raleigh	74.7%
15	Philadelphia	73.8%
16	Charlotte	72.9%
17	**Baltimore**	**66.8%**
18	Richmond	65.6%
19	Atlanta	64.3%
20	Washington, DC	63.0%

Source: Bureau of the Census, 2005.

BLACK POPULATION
2004

Rank	Region	% of Population
1	Richmond	30.6%
2	Atlanta	30.3%
3	**Baltimore**	**28.3%**
4	Washington, DC	26.6%
5	Charlotte	23.2%
6	Philadelphia	20.8%
7	Raleigh	20.2%
8	Cleveland	19.8%
9	St. Louis	18.1%
10	Indianapolis	14.6%
11	Dallas	14.2%
12	Tampa	11.2%
13	Pittsburgh	8.2%
14	Austin	7.9%
15	Boston	7.6%
16	Minneapolis	6.2%
17	Denver	5.7%
18	San Diego	5.7%
19	Seattle	5.4%
20	Portland	2.8%

Source: Bureau of the Census, 2005.

ASIAN, HAWAIIAN OR OTHER PACIFIC ISLANDER 2004		
Rank	**Region**	**% of Population**
1	San Diego	10.0%
2	Seattle	9.8%
3	Washington, DC	8.0%
4	Boston	5.6%
5	Portland	5.2%
6	Minneapolis	4.8%
7	Dallas	4.5%
8	Austin	4.2%
9	Philadelphia	3.9%
10	Atlanta	3.9%
11	Raleigh	3.4%
12	Denver	3.3%
13	**Baltimore**	**3.3%**
14	Charlotte	2.5%
15	Tampa	2.4%
16	Richmond	2.3%
17	St. Louis	1.7%
18	Cleveland	1.6%
19	Indianapolis	1.5%
20	Pittsburgh	1.3%

Source: Bureau of the Census, 2005.

HISPANIC POPULATION 2004		
Rank	**Region**	**% of Population**
1	San Diego	29.0%
2	Austin	28.7%
3	Dallas	25.0%
4	Denver	21.1%
5	Tampa	12.6%
6	Washington, DC	10.7%
7	Portland	9.0%
8	Atlanta	8.2%
9	Raleigh	7.4%
10	Boston	7.3%
11	Charlotte	7.0%
12	Seattle	6.3%
13	Philadelphia	5.8%
14	Minneapolis	4.1%
15	Indianapolis	3.7%
16	Cleveland	3.7%
17	Richmond	2.9%
18	**Baltimore**	**2.5%**
19	St. Louis	1.8%
20	Pittsburgh	0.8%

Source: Bureau of the Census, 2005.

POPULATION AGE 20 TO 64 2004		
Rank	**Region**	**Percent of Population**
1	Austin	64.0%
2	Seattle	63.8%
3	Raleigh	63.5%
4	Washington, DC	63.1%
5	Atlanta	62.9%
6	Portland	62.5%
7	Denver	62.2%
8	Minneapolis	62.2%
9	Boston	62.0%
10	Charlotte	62.0%
11	Richmond	61.4%
12	Dallas	61.4%
13	**Baltimore**	**60.4%**
14	San Diego	60.1%
15	Indianapolis	60.0%
16	St. Louis	59.9%
17	Philadelphia	59.6%
18	Pittsburgh	58.8%
19	Cleveland	58.8%
20	Tampa	57.6%

Source: Bureau of the Census, 2005.

POPULATION AGED 65 AND OVER 2004		
Rank	**Region**	**Percent of Population**
1	Austin	7.3%
2	Atlanta	7.8%
3	Dallas	7.9%
4	Raleigh	8.0%
5	Denver	9.1%
6	Washington, DC	9.2%
7	Charlotte	9.6%
8	Minneapolis	9.7%
9	Seattle	10.2%
10	Portland	10.2%
11	Indianapolis	10.6%
12	San Diego	11.1%
13	Richmond	11.3%
14	**Baltimore**	**12.0%**
	U.S.	12.4%
15	Boston	12.5%
16	St. Louis	12.8%
17	Philadelphia	13.0%
18	Cleveland	14.4%
19	Pittsburgh	17.3%
20	Tampa	17.6%

Source: Bureau of the Census, 2005.

Market, Income and Area

Greater Baltimore ranks 23rd nationally and 7th among the 20 benchmark metros for per capita income at $36,733. Of the 20 markets, Washington, D.C. and Boston have the highest incomes, while Austin and Tampa are the only metros that fall below the U.S. average of $31,472.

Greater Baltimore ranks 4th among the 20 benchmarks for per capita income growth. From 2001 to 2003, the region's income grew 2.6 percent. St. Louis, Philadelphia and San Diego realized the greatest gains, while six regions registered declines.

Greater Baltimore ranks 17th among the 20 benchmark metros for housing starts, even though demand in the region has risen dramatically. As opposed to sprawling metros like Atlanta, Dallas and Washington, D.C., Baltimore is somewhat landlocked between Philadelphia, Washington and the Chesapeake Bay. The region is also limited in growth by its density and lack of available land for development. Many suburban counties have growth restrictions that are limiting housing starts. While this could be viewed as a negative, it is also helping to spur infill development and growth of the urban core and supports the State's smart growth efforts.

PER CAPITA PERSONAL INCOME 2003			
Rank	**National Rank 2003**	**Region**	**Per Capita Personal Income 2003**
1	4	Washington, DC	$44,056
2	5	Boston	$43,135
3	11	Denver	$39,203
4	12	Seattle	$39,009
5	14	Minneapolis	$38,601
6	21	Philadelphia	$37,059
7	**23**	**Baltimore**	**$36,733**
8	28	San Diego	$35,841
9	38	Dallas	$33,790
10	40	Raleigh	$33,627
11	42	Indianapolis	$33,618
12	45	St. Louis	$33,535
13	51	Atlanta	$33,308
14	52	Charlotte	$33,251
15	54	Cleveland	$33,196
16	56	Pittsburgh	$33,015
17	60	Richmond	$32,879
18	70	Portland	$32,152
		United States	$31,472
19	88	Austin	$31,135
20	125	Tampa	$29,881

Source: Bureau of Economic Analysis

PER CAPITAL PERSONAL INCOME PERCENTAGE CHANGE 2001-2003 vs. 1999-2001				
2001-2003 Rank	**Region**	**2001-2003 Average Annual Percent Change**	**1999-2001 Rank**	**1999-2001 Average Annual Percent Change**
1	St. Louis	3.2%	16	3.6%
2	Philadelphia	3.0%	7	4.9%
3	San Diego	2.8%	5	6.1%
4	**Baltimore**	**2.6%**	**4**	**6.1%**
5	Pittsburgh	2.3%	9	4.7%
6	Cleveland	2.2%	18	2.9%
7	Washington, DC	1.9%	3	6.2%
8	Indianapolis	1.7%	11	4.5%
9	Minneapolis	1.6%	14	4.2%
10	Seattle	1.6%	19	2.8%
11	Richmond	1.6%	6	5.6%
	United States	1.5%		4.7%
12	Charlotte	1.0%	17	3.5%
13	Tampa	0.9%	10	4.5%
14	Boston	0.7%	2	7.2%
15	Denver	-0.3%	1	7.6%
16	Portland	-0.3%	15	4.2%
17	Atlanta	-0.5%	12	4.3%
18	Raleigh	-0.7%	13	4.3%
19	Dallas	-0.7%	8	4.9%
20	Austin	-1.7%	20	1.9%

Source: Bureau of Economic Analysis

MEDIAN HOUSEHOLD EFFECTIVE BUYING INCOME 2004			
Rank	**National Ranking (of top 300)**	**Region**	**EBI**
1	6	Washington DC	$53,275
2	20	Boston	$47,905
3	22	Minneapolis	$47,632
4	25	Denver	$47,275
5	28	Raleigh	$45,738
6	29	Seattle	$45,698
7	32	Austin	$45,171
8	34	Atlanta	$45,074
9	43	Dallas	$44,240
10	53	San Diego	$43,346
11	54	**Baltimore**	**$43,167**
12	57	Philadelphia	$42,852
13	69	Charlotte	$42,055
14	70	Indianapolis	$42,003
15	84	Richmond	$41,112
16	85	Portland	$41,079
17	109	St. Louis	$39,668
		U.S.	$38,201
18	172	Cleveland	$38,169
19	264	Tampa	$35,780
20		Pittsburgh	$34,097

Source: Survey of Buying Power, 2004

HOUSING STARTS 2003 and 2004				
2004 Rank	**Region**	**Total Units Authorized 2004**	**2003 Rank**	**Total Units Aurhorized 2003**
1	Atlanta	73,995	1	66,377
2	Dallas	53,470	2	52,813
3	Washington DC	38,024	3	35,847
4	Tampa	29,557	4	29,281
5	Minneapolis	27,689	5	27,623
6	Seattle	23,847	7	20,601
7	Denver	21,770	10	17,359
8	Charlotte	21,551	8	18,833
9	Philadelphia	21,010	6	21,080
10	Austin	17,487	13	15,317
11	Portland	15,859	11	16,003
12	San Diego	15,587	9	18,031
13	St. Louis	15,457	14	14,754
14	Boston	15,423	15	14,041
15	Indianapolis	15,355	12	15,784
16	Raleigh	14,404	16	12,660
17	**Baltimore**	**10,282**	**17**	**11,133**
18	Richmond	9,298	18	9,177
19	Cleveland	7,409	19	7,040
20	Pittsburgh	6,855	20	6,513

Source: Bureau of the Census

RETAIL SALES OF ESTABLISHMENTS WITH PAYROLL 2002		
Rank	**Region**	**Retail Sales (000's)**
1	Philadelphia	$67,476,234
2	Dallas	$62,298,014
3	Washington DC	$55,882,147
4	Boston	$53,092,482
5	Atlanta	$52,509,412
6	Minneapolis	$38,699,748
7	Seattle	$37,994,312
8	San Diego	$31,586,056
9	Tampa	$30,089,543
10	St. Louis	$30,087,571
11	**Baltimore**	**$28,316,554**
12	Denver	$27,988,644
13	Pittsburgh	$25,138,463
14	Cleveland	$23,714,767
15	Portland	$21,750,097
16	Austin	$21,024,158
17	Indianapolis	$19,132,257
18	Charlotte	$17,091,039
19	Richmond	$12,657,431
20	Raleigh	$11,145,427

Source: Bureau of the Census.
2002 Economic Census, Geographic Area Series

GROSS METRO PRODUCT 2003			
Rank Among Benchmarks	**National Rank**	**Region**	**GMP ($billion) 2003**
1	4	Boston	298.0
2	5	Washington, DC	255.0
3	6	Philadelphia	201.0
4	8	Atlanta	188.2
5	9	Dallas	172.0
6	12	Minneapolis	135.0
7	14	San Diego	129.0
8	15	Seattle	125.4
9	**18**	**Baltimore**	**107.6**
10	22	Denver	102.7
11	23	St. Louis	96.0
12	24	Tampa	92.1
13	25	Cleveland	87.5
14	26	Pittsburgh	87.4
15	29	Portland	78.8
16	33	Charlotte	72.2
17	42	Indianapolis	64.4
18	49	Austin	51.1
19	52	Richmond	50.4
20	55	Raleigh	49.1

Source: U.S. Conference of Mayors, 2003
MSAs based on 1993 OMB definitions.

LAND AREA 2004		
Rank	**Region**	**Square Miles**
1	Dallas	8,989.6
2	St. Louis	8,648.6
3	Atlanta	8,376.4
4	Denver	8,369.1
5	Portland	6,683.8
6	Minneapolis	6,063.3
7	Seattle	5,893.8
8	Richmond	5,712.3
9	Washington, DC	5,625.9
10	Pittsburgh	5,279.5
11	Philadelphia	4,629.7
12	Austin	4,223.9
13	San Diego	4,200.0
14	Indianapolis	3,863.7
15	Boston	3,507.3
16	Charlotte	3,098.8
17	**Baltimore**	**2,608.5**
18	Tampa	2,554.1
19	Raleigh	2,115.8
20	Cleveland	2,004.2

Source: County & City Extra, Bernan, 2004.

POPULATION DENSITY		
2004		
2000 Rank	**Region**	**Population Per Square Mile**
1	Boston	1,261.5
2	Philadelphia	1,252.9
3	Cleveland	1,066.3
4	Tampa	1,013.3
5	**Baltimore**	**1,011.8**
6	Washington, DC	913.6
7	San Diego	698.0
8	Dallas	634.1
9	Atlanta	562.1
10	Seattle	537.3
11	Minneapolis	513.9
12	Charlotte	475.9
13	Pittsburgh	454.9
14	Raleigh	432.3
15	Indianapolis	419.7
16	Austin	334.3
17	St. Louis	319.6
18	Portland	308.9
19	Denver	278.4
20	Richmond	202.1

ECONOMY

New North American Industry Classification System Industry categories have been developed, so newly-defined industry classifications measured in this report are specifically highlighted and summarized in the Employment and Job Growth sub-section.

The breakup of the “services” industry into new categories helps to dispel the common notion that service jobs are mostly low wage positions. Many of the service sectors, such as professional and business services, education and health care services, and information, provide employment for highly educated workers.

Employment

Five newly-defined industry categories in this report are:

- *Educational and Health Services*: Greater Baltimore ranks 4th among the 20 regions for educational and health care services, with 16.2 percent of employment in these sectors. Pittsburgh, Boston and Philadelphia are the top three among metros measured, while Charlotte and Raleigh trail the group. Raleigh ranks low in this factor largely because its metro area is no longer statistically joined with Durham.

- *Financial Services*: With 6.5 percent of its employment in financial services, Greater Baltimore ranks 15th among the 20 regions, and above the U.S. average of 6.1 percent. The top markets studied are Charlotte and Denver. The bottom markets are Raleigh and Washington, D.C.

- *Leisure and Hospitality*: Greater Baltimore ranks 14th for employment in the leisure and hospitality sector, with 8.7 percent of total employment in this sector. San Diego, St. Louis, Denver and Austin are the top markets with more than 10 percent employed in the sector. Philadelphia ranks 20th.

- *Professional and Business Services*: Greater Baltimore ranks 12th among the 20 regions for professional and business services with 14.1 percent of total employment in this sector. Tampa (25.6 percent) and Washington, D.C. (21.5 percent) lead the group, while Pittsburgh (12.2 percent) and Cleveland (12.4 percent) rank 19th and 20th respectively.

- *Information Employment*: Greater Baltimore ranks 20th among the 20 benchmark regions for employment in information services, with only 1.7 percent. This sector includes publishing, internet, television and other information services. Top markets for this sector are Seattle, Denver and Atlanta.

The Greater Baltimore region ranks 10th for total employment among the 20 benchmark regions, as all regions experienced positive job growth.

Greater Baltimore ranks 4th for government employment, with 17.1 percent employed in the sector. Austin and Washington, D.C. rank first, with 22 percent, while Pittsburgh ranks 20th with 11.3

percent.

Meanwhile, high-tech employment figures have not been released for metro areas since a 1998 report called Cybercities. This information is not produced by a government agency and is considered expensive and difficult to gather by metro area. There is also less interest in high-tech rankings since the dot.com bust and there are debates as to what industry sectors are high tech.

Since high-tech employment information continues to be available by state we have included those rankings, though not for metro areas, in this report. Maryland ranks 5th among the benchmarks for high-tech employment concentration and 2nd for change in high-tech employment. The District of Columbia ranks 1st for both.

TOTAL NON-FARM EMPLOYMENT 2002 and 2004				
2004 Rank	**Region**	**2004 Annual Employment (000)s**	**2002 Rank**	**2002 Annual Employment (000)s**
1	Washington, DC	2847.9	2	2727.4
2	Philadelphia	2744.2	1	2739.3
3	Dallas	2695.9	3	2705.1
4	Boston	2398.9	4	2462.0
5	Atlanta	2264.5	5	2258.7
6	Minneapolis	1738.0	6	1721.1
7	Seattle	1590.0	7	1581.7
8	St. Louis	1322.8	8	1334.2
9	Tampa	1272.7	11	1212.2
10	**Baltimore**	**1263.1**	**9**	**1251.7**
11	San Diego	1258.6	10	1230.7
12	Denver	1167.6	12	1171.2
13	Pittsburgh	1134.7	13	1142.1
14	Cleveland	1073.4	14	1082.3
15	Portland	946.1	15	939.3
16	Indianapolis	878.7	16	857.6
17	Charlotte	773.4	17	769.2
18	Austin	666.1	18	658.4
19	Richmond	602.1	19	585.2
20	Raleigh	443.5	20	431.4

Source: Bureau of Labor Statistics

MANUFACTURING EMPLOYMENT 2002 and 2004				
2004 Rank	**Region**	**2004 Annual Employment (000)s**	**2002 Rank**	**2002 Annual Employment (000)s**
1	Dallas	293.9	1	310.1
2	Philadelphia	236.5	2	262.7
3	Boston	231.2	3	255.6
4	Minneapolis	202.7	4	211.3
5	Atlanta	176.8	5	186.0
6	Seattle	164.4	6	184.0
7	Cleveland	151.9	7	162.0
8	St. Louis	144.7	8	157.6
9	Portland	119.9	9	123.8
10	San Diego	104.2	11	112.3
11	Pittsburgh	103.3	10	115.1
12	Indianapolis	101.3	12	104.3
13	Charlotte	85.7	13	97.9
14	**Baltimore**	**76.1**	**14**	**85.5**
15	Denver	72.1	16	74.0
16	Tampa	71.7	15	75.6
17	Washington, DC	65.8	17	72.2
18	Austin	57.1	18	63.5
19	Richmond	46.3	19	51.1
20	Raleigh	30.2	20	32.9

Source: Bureau of Labor Statistics

MANUFACTURING EMPLOYMENT AS PERCENT OF TOTAL NON-FARM EMPLOYMENT 2002 and 2004				
2004 Rank	**Region**	**2004 Percent Manufacturing**	**2002 Rank**	**2002 Percent Manufacturing**
1	Cleveland	14.2%	1	15.0%
2	Portland	12.7%	2	13.2%
3	Minneapolis	11.7%	4	12.3%
4	Indianapolis	11.5%	5	12.2%
5	Charlotte	11.1%	3	12.7%
6	St. Louis	10.9%	6	11.8%
7	Dallas	10.9%	8	11.5%
	U.S.	10.9%		11.7%
8	Seattle	10.3%	7	11.6%
9	Boston	9.6%	9	10.4%
10	Pittsburgh	9.1%	10	10.1%
11	Philadelphia	8.6%	12	9.6%
12	Austin	8.6%	11	9.6%
13	San Diego	8.3%	13	9.1%
14	Atlanta	7.8%	15	8.2%
15	Richmond	7.7%	14	8.7%
16	Raleigh	6.8%	16	7.6%
17	Denver	6.2%	18	6.3%
18	**Baltimore**	**6.0%**	**17**	**6.8%**
19	Tampa	5.6%	19	6.2%
20	Washington, DC	2.3%	20	2.6%

Source: Bureau of Labor Statistics

FINANCIAL SERVICES EMPLOYMENT AS A PERCENT OF TOTAL NON-FARM EMPLOYMENT 2002 and 2004				
2004 Rank	**Region**	**2004 Percent Financial Services**	**2002 Rank**	**2002 Percent Financial Services**
1	Charlotte	8.8%	1	8.3%
2	Denver	8.4%	2	8.1%
3	Minneapolis	8.1%	5	7.9%
4	Philadelphia	8.0%	3	8.0%
5	Dallas	8.0%	6	7.9%
6	Richmond	7.8%	4	8.0%
7	Boston	7.6%	7	7.8%
8	Cleveland	7.6%	9	7.3%
9	Tampa	7.4%	8	7.6%
10	Indianapolis	7.2%	10	7.3%
11	Portland	6.9%	11	7.0%
12	Atlanta	6.7%	12	6.7%
13	Seattle	6.5%	14	6.4%
14	San Diego	6.5%	15	6.1%
15	**Baltimore**	**6.5%**	**13**	**6.4%**
16	Pittsburgh	6.1%	16	6.0%
	U.S.	6.1%		6.0%
17	Austin	6.0%	18	5.8%
18	St. Louis	5.9%	17	5.9%
19	Washington, DC	5.5%	19	5.5%
20	Raleigh	5.4%	20	5.2%

Source: Bureau of Labor Statistics

EDUCATIONAL AND HEALTH SERVICES EMPLOYMENT AS A PERCENT OF TOTAL NON-FARM EMPLOYMENT
2002 and 2004

2004 Rank	Region	2004 Percent Educational & Health Services	2002 Rank	2002 Percent Educational & Health Services
1	Pittsburgh	18.8%	1	18.1%
2	Boston	18.0%	3	17.1%
3	Philadelphia	17.8%	2	17.5%
4	**Baltimore**	**16.2%**	**4**	**15.5%**
5	Cleveland	15.3%	5	15.1%
6	St. Louis	14.8%	6	14.5%
	U.S.	12.9%		12.4%
7	Minneapolis	12.4%	8	11.7%
8	Portland	12.2%	7	11.8%
9	Indianapolis	12.1%	9	11.4%
10	Tampa	11.6%	10	11.4%
11	Seattle	11.1%	11	10.8%
12	Richmond	10.7%	16	9.7%
13	Washington, DC	10.6%	12	10.8%
14	Austin	10.2%	13	9.8%
15	Dallas	10.2%	15	9.7%
16	Denver	10.0%	17	9.4%
17	Atlanta	9.8%	18	9.2%
18	San Diego	9.6%	14	9.7%
19	Raleigh	9.2%	19	8.7%
20	Charlotte	8.4%	20	7.7%

Source: Bureau of Labor Statistics

INFORMATION EMPLOYMENT AS A PERCENT OF TOTAL NON-FARM EMPLOYMENT 2002 and 2004				
2004 Rank	**Region**	**2004 Percent Information**	**2002 Rank**	**2002 Percent Information**
1	Seattle	4.7%	2	4.8%
2	Denver	4.4%	1	5.0%
3	Atlanta	4.1%	3	4.6%
4	Raleigh	3.9%	5	4.2%
5	Washington, DC	3.8%	4	4.2%
6	Dallas	3.5%	6	4.0%
7	Austin	3.0%	7	3.4%
8	Boston	3.0%	8	3.4%
9	Charlotte	3.0%	9	3.1%
10	San Diego	2.9%	10	3.1%
11	Tampa	2.6%	11	3.0%
12	Minneapolis	2.5%	12	2.8%
	U.S.	2.4%		2.6%
13	Portland	2.4%	13	2.5%
14	St. Louis	2.2%	16	2.3%
15	Pittsburgh	2.1%	15	2.3%
16	Philadelphia	2.0%	14	2.5%
17	Cleveland	1.9%	18	2.0%
18	Indianapolis	1.9%	19	1.9%
19	Richmond	1.9%	17	2.1%
20	**Baltimore**	**1.7%**	**20**	**1.7%**

Source: Bureau of Labor Statistics

PROFESSIONAL AND BUSINESS SERVICES EMPLOYMENT AS A PERCENT OF TOTAL NON-FARM EMPLOYMENT 2002 and 2004				
2004 Rank	**Region**	**2004 Percent Professional & Business Services**	**2002 Rank**	**2002 Percent Professional & Business Services**
1	Tampa	25.6%	1	23.3%
2	Washington, DC	21.5%	2	20.6%
3	Atlanta	16.3%	4	16.2%
4	San Diego	16.3%	3	16.4%
5	Denver	15.7%	7	15.5%
6	Raleigh	15.7%	5	15.9%
7	Boston	15.6%	6	15.5%
8	Philadelphia	14.6%	11	14.0%
9	Charlotte	14.5%	9	14.6%
10	Richmond	14.4%	8	15.0%
11	Minneapolis	14.1%	10	14.2%
12	**Baltimore**	**14.1%**	**12**	**14.0%**
13	Dallas	13.6%	15	13.1%
14	St. Louis	13.6%	13	13.4%
15	Indianapolis	13.4%	18	12.5%
16	Austin	13.3%	14	13.2%
17	Seattle	12.8%	17	12.7%
18	Portland	12.8%	16	13.0%
	U.S.	12.5%		12.3%
19	Cleveland	12.4%	19	12.1%
20	Pittsburgh	12.2%	20	12.0%

Source: Bureau of Labor Statistics

WHOLESALE AND RETAIL TRADE EMPLOYMENT AS A PERCENT OF TOTAL NON-FARM EMPLOYMENT 2002 and 2004				
2004 Rank	**Region**	**2004 Percent Trade**	**2002 Rank**	**2002 Percent Trade**
1	Atlanta	17.6%	1.0	18.2%
2	Dallas	17.0%	2.0	17.7%
3	Charlotte	16.9%	4.0	16.8%
4	Portland	16.6%	6.0	16.5%
5	Pittsburgh	16.3%	7.0	16.1%
6	Raleigh	16.3%	5.0	16.6%
7	Indianapolis	16.2%	3.0	16.9%
8	Philadelphia	16.0%	8.0	16.0%
9	**Baltimore**	**15.8%**	**13.0**	**15.7%**
10	Denver	15.7%	9.0	16.0%
11	Seattle	15.7%	11.0	15.7%
12	Cleveland	15.7%	14.0	15.7%
13	Minneapolis	15.6%	12.0	15.7%
14	St. Louis	15.5%	16.0	15.3%
15	Richmond	15.4%	15.0	15.4%
16	Boston	15.0%	17.0	14.8%
17	Tampa	14.9%	10.0	15.8%
18	San Diego	14.8%	18.0	14.6%
19	Austin	14.5%	19.0	14.2%
	U.S.	13.7%		13.7%
20	Washington, DC	11.6%	20.0	11.7%

Source: Bureau of Labor Statistics

GOVERNMENT EMPLOYMENT AS A PERCENT OF TOTAL NON-FARM EMPLOYMENT 2002 and 2004				
2004 Rank	**Region**	**2004 Percent Government**	**2002 Rank**	**2002 Percent Government**
1	Austin	21.8%	2	22.0%
2	Washington, DC	21.8%	1	22.0%
3	Raleigh	19.2%	4	18.4%
4	Richmond	18.6%	3	18.8%
5	**Baltimore**	**17.1%**	**6**	**17.8%**
6	San Diego	17.1%	5	17.9%
	U.S.	16.4%		16.5%
7	Seattle	15.8%	7	15.7%
8	Denver	14.0%	8	14.0%
9	Portland	13.8%	10	13.7%
10	Minneapolis	13.8%	9	13.8%
11	Atlanta	13.4%	12	13.1%
12	Cleveland	13.2%	11	13.3%
13	Indianapolis	12.9%	13	13.0%
14	Philadelphia	12.9%	14	12.8%
15	Dallas	12.8%	16	12.3%
16	Charlotte	12.8%	17	12.2%
17	St. Louis	12.6%	15	12.6%
18	Boston	12.0%	19	12.1%
19	Tampa	11.6%	18	12.1%
20	Pittsburgh	11.3%	20	11.3%

Source: Bureau of Labor Statistics

WOMEN-OWNED FIRMS AS A PERCENT OF TOTAL FIRMS

1997

Rank	Region	Percent of Total Firms
1	Portland-Vancouver	29.9%
2	Washington, DC	29.8%
3	St. Louis	28.9%
4	**Baltimore**	**28.8%**
5	Minneapolis-St. Paul	28.5%
6	San Diego	28.5%
7	Seattle	28.4%
8	Denver	28.3%
9	Tampa	26.8%
10	Atlanta	26.6%
11	Boston	26.6%
12	Indianapolis	26.6%
13	Dallas	26.5%
14	Raleigh-Durham	26.4%
15	Richmond	26.1%
16	Cleveland	26.0%
17	Austin	26.0%
18	Charlotte	24.0%
19	Philadelphia	23.8%
20	Greenville-Spartanburg	23.8%

Source: Bureau of the Census, 1997 Economic Census
Note: Comprehensive updated data not yet available. Expected in early 2006.

MINORITY-OWNED FIRMS AS PERCENT OF TOTAL FIRMS

1997

Rank	Region	Percent of Total Firms
1	Washington, DC	25.2%
2	San Diego	23.2%
3	Dallas	18.3%
4	Atlanta	18.0%
5	Austin	16.8%
6	Richmond	16.1%
7	**Baltimore**	**15.6%**
8	Tampa	14.4%
9	Raleigh-Durham	13.2%
10	Seattle	12.3%
11	Philadelphia	10.7%
12	Charlotte	10.6%
13	Denver	10.5%
14	St. Louis	8.8%
15	Cleveland	8.5%
16	Boston	8.0%
17	Portland-Vancouver	7.6%
18	Indianapolis	7.4%
19	Greenville-Spartanburg	6.7%
20	Minneapolis-St. Paul	4.8%

Source: Bureau of the Census, 1997 Economic Census
Note: Comprehensive updated data not yet available. Expected in early 2006.

HIGH TECH EMPLOYMENT, BY STATE 2003			
Rank	**State**	**Region**	**High Tech Employment per 100,000 Population**
1	District of Columbia	Washington DC	5,908
2	Massachusetts	Boston	3,662
3	Colorado	Denver	3,565
4	Virginia	Richmond, DC suburbs	3,306
5	**Maryland**	**Baltimore, DC suburbs**	**2,813**
6	California	San Diego	2,580
7	Minnesota	Minneapolis	2,468
8	Washington	Seattle	2,459
9	Oregon	Portland	2,288
10	Texas	Austin, Dallas	2,016
11	Georgia	Atlanta	1,929
12	Pennsylvania	Philadelphia, Pittsburgh	1,648
13	North Carolina	Charlotte, Raleigh	1,618
14	Missouri	St. Louis	1,527
15	Florida	Tampa	1,521
16	Ohio	Cleveland	1,388
17	Indiana	Indianapolis	1,093

Source: Cyberstates 2005.
Data at the metropolitan area level not available.

Employment Growth by Sector

While Greater Baltimore realized a 0.46 percent gain in average annual employment from 2002 to 2004, this still placed the region 9th among the 20 benchmarks and just above the U.S. average of 0.44 percent. Six of the regions actually experienced job losses, with Boston, St. Louis, Cleveland and Pittsburgh taking the hardest hits. Tampa and Washington, D.C. realized the greatest growth at more than 2 percent.

Greater Baltimore experienced 0.7 percent growth between 2002-2004 in wholesale and retail trade employment, placing it 5th among the 20 metro areas. The U.S. average in this category registered a decline (-0.1 percent).

None of the 20 metros experienced growth in information employment, demonstrating the difficult market for publishing and media. While Greater Baltimore declined by –1.4 percent, that still placed the region 4th among those studied. Philadelphia (-8.8 percent) and Boston (-6.9 percent) realized the greatest declines.

With a 7.1 percent growth in high-tech employment between 2000 and 2003, Washington, D.C. was the only jurisdiction measured for this report that registered an increase in this category. Maryland, with a 4.6 percent employment decline in this sector, nevertheless is ranked 2nd among the 20 jurisdictions that include the regions in this study. States considered high-tech centers, such as Colorado, Texas, North Carolina, California and Massachusetts realized the greatest employment losses, with more than 17 percent declines in each.

TOTAL NON-FARM EMPLOYMENT GROWTH 2000-2002 vs. 2002-2004				
2004 Rank	**Region**	**2002-2004 Average Annual Growth**	**2002 Rank**	**2000-2002 Average Annual Growth**
1	Tampa	2.50%	5	0.1%
2	Washington, DC	2.21%	2	0.9%
3	Richmond	1.44%	8	-0.2%
4	Raleigh	1.40%	11	-0.4%
5	Indianapolis	1.23%	3	0.2%
6	San Diego	1.13%	1	1.5%
7	Austin	0.58%	15	-1.1%
8	Minneapolis	0.49%	13	-0.8%
9	**Baltimore**	**0.46%**	**6**	**0.0%**
	U.S.	0.44%		-0.5%
10	Portland	0.36%	17	-1.5%
11	Charlotte	0.27%	4	0.2%
12	Seattle	0.26%	19	-2.0%
13	Atlanta	0.13%	12	-0.7%
14	Philadelphia	0.09%	7	-0.1%
15	Denver	-0.15%	18	-1.6%
16	Dallas	-0.17%	14	-1.1%
17	Pittsburgh	-0.32%	9	-0.2%
18	Cleveland	-0.41%	20	-2.4%
19	St. Louis	-0.43%	10	-0.2%
20	Boston	-1.28%	16	-1.5%

Source: Bureau of Labor Statistics

MANUFACTURING EMPLOYMENT GROWTH 2000-2002 vs. 2002-2004				
2004 Rank	**Region**	**Average Annual Growth 2002-2004**	**2002 Rank**	**Average Annual Growth 2000-2002**
1	Denver	-1.3%	18	-7.4%
2	Indianapolis	-1.4%	1	-3.5%
3	Portland	-1.6%	16	-6.8%
4	Minneapolis	-2.0%	9	-5.3%
5	Atlanta	-2.5%	7	-5.1%
6	Tampa	-2.6%	11	-5.6%
7	Dallas	-2.6%	13	-6.0%
	U.S.	-3.0%		-5.8%
8	Cleveland	-3.1%	19	-8.8%
9	San Diego	-3.6%	2	-4.2%
10	St. Louis	-4.1%	3	-4.5%
11	Raleigh	-4.1%	15	-6.5%
12	Washington, DC	-4.4%	8	-5.3%
13	Richmond	-4.7%	4	-4.9%
14	Boston	-4.8%	17	-7.0%
15	Philadelphia	-5.0%	5	-4.9%
16	Austin	-5.0%	20	-11.7%
17	Pittsburgh	-5.1%	12	-5.6%
18	Seattle	-5.3%	14	-6.5%
19	**Baltimore**	**-5.5%**	**10**	**-5.5%**
20	Charlotte	-6.2%	6	-4.9%

Source: Bureau of Labor Statistics

FINANCIAL SERVICES EMPLOYMENT GROWTH 2000-2002 vs. 2002-2004				
2004 Rank	**Region**	**Average Annual Growth 2002-2004**	**2002 Rank**	**Average Annual Growth 2000-2002**
1	San Diego	4.3%	3	2.7%
2	Raleigh	3.4%	14	0.5%
3	Charlotte	3.0%	1	6.6%
4	Austin	2.5%	2	3.5%
5	Denver	2.0%	20	-0.8%
6	Minneapolis	1.9%	5	2.0%
7	Washington, DC	1.8%	6	1.9%
8	Tampa	1.4%	13	0.5%
	U.S.	1.3%		1.0%
9	Seattle	1.3%	15	0.4%
10	Cleveland	1.2%	16	0.2%
11	Indianapolis	0.9%	19	-0.5%
12	**Baltimore**	**0.8%**	**8**	**1.1%**
13	Pittsburgh	0.8%	10	0.9%
14	Dallas	0.4%	9	1.1%
15	Atlanta	0.4%	11	0.8%
16	Richmond	0.3%	7	1.8%
17	Philadelphia	0.1%	17	0.1%
18	Portland	0.0%	12	0.6%
19	St. Louis	-0.4%	4	2.1%
20	Boston	-2.4%	18	0.1%

Source: Bureau of Labor Statistics

EDUCATIONAL AND HEALTH SERVICES EMPLOYMENT GROWTH 2000-2002 vs. 2002-2004				
2004 Rank	**Region**	**Average Annual Growth 2002-2004**	**2002 Rank**	**Average Annual Growth 2000-2002**
1	Richmond	6.9%	3	4.8%
2	Raleigh	4.5%	1	7.2%
3	Charlotte	4.4%	2	5.1%
4	Indianapolis	4.1%	11	3.4%
5	Minneapolis	3.7%	6	4.0%
6	Tampa	3.2%	20	1.1%
7	Atlanta	3.1%	4	4.4%
8	Denver	3.0%	9	3.7%
9	**Baltimore**	**2.6%**	**18**	**1.9%**
10	Austin	2.5%	16	1.9%
	U.S.	2.3%		3.6%
11	Dallas	2.3%	8	3.8%
12	Portland	1.9%	7	3.9%
13	Pittsburgh	1.6%	15	2.2%
14	Seattle	1.4%	13	2.6%
15	Boston	1.2%	19	1.8%
16	Washington, DC	1.1%	10	3.5%
17	Philadelphia	1.0%	14	2.4%
18	San Diego	0.7%	17	1.9%
19	St. Louis	0.6%	12	3.4%
20	Cleveland	0.4%	5	4.3%

Source: Bureau of Labor Statistics

INFORMATION EMPLOYMENT GROWTH 2000-2002 vs. 2002-2004				
2004 Rank	**Region**	**Average Annual Growth 2002-2004**	**2002 Rank**	**Average Annual Growth 2000-2002**
1	Indianapolis	0.0%	8	-2.6%
2	Seattle	-0.4%	5	-2.2%
3	St. Louis	-0.8%	10	-2.8%
4	**Baltimore**	**-1.4%**	**19**	**-6.2%**
5	Charlotte	-1.5%	4	-2.2%
6	San Diego	-1.7%	3	-1.9%
7	Raleigh	-2.5%	2	-0.8%
8	Portland	-2.7%	13	-4.2%
9	Washington, DC	-3.2%	14	-4.5%
10	Pittsburgh	-3.5%	1	0.0%
11	Tampa	-3.6%	16	-4.9%
	U.S.	-3.8%		-3.2%
12	Cleveland	-4.1%	15	-4.7%
13	Richmond	-4.8%	6	-2.3%
14	Austin	-5.1%	12	-3.5%
15	Atlanta	-5.8%	11	-2.9%
16	Minneapolis	-6.0%	9	-2.8%
17	Dallas	-6.4%	17	-5.9%
18	Denver	-6.4%	20	-8.7%
19	Boston	-6.9%	18	-5.9%
20	Philadelphia	-8.8%	7	-2.4%

Source: Bureau of Labor Statistics

PROFESSIONAL AND BUSINESS SERVICES EMPLOYMENT GROWTH 2000-2002 vs. 2002-2004				
2004 Rank	**Region**	**Average Annual Growth 2002-2004**	**2002 Rank**	**Average Annual Growth 2000-2002**
1	Tampa	7.7%	1	2.4%
2	Indianapolis	4.9%	5	-0.2%
3	Washington, DC	4.7%	4	0.4%
4	Philadelphia	2.2%	7	-1.3%
5	Dallas	1.6%	17	-4.0%
	U.S.	1.4%		-2.1%
6	Austin	0.9%	10	-2.6%
7	Seattle	0.9%	15	-3.7%
8	**Baltimore**	**0.9%**	**3**	**0.7%**
9	San Diego	0.8%	2	1.7%
10	Pittsburgh	0.8%	6	-0.9%
11	Denver	0.7%	18	-4.1%
12	Raleigh	0.7%	9	-2.5%
13	Cleveland	0.6%	20	-4.2%
14	Atlanta	0.6%	13	-3.3%
15	St. Louis	0.2%	11	-2.6%
16	Minneapolis	0.2%	16	-3.7%
17	Charlotte	0.0%	12	-2.6%
18	Portland	-0.3%	14	-3.4%
19	Richmond	-0.5%	8	-2.3%
20	Boston	-1.1%	19	-4.2%

Source: Bureau of Labor Statistics

WHOLESALE AND RETAIL TRADE EMPLOYMENT GROWTH 2000-2002 vs. 2002-2004				
2004 Rank	**Region**	**Average Annual Growth 2002-2004**	**2002 Rank**	**Average Annual Growth 2000-2002**
1	San Diego	1.9%	1	1.9%
2	Washington, DC	1.8%	3	-0.4%
3	Richmond	1.5%	7	-0.6%
4	Austin	1.5%	10	-1.1%
5	**Baltimore**	**0.7%**	**6**	**-0.5%**
6	Raleigh	0.6%	18	-2.3%
7	Charlotte	0.6%	12	-1.2%
8	Portland	0.5%	17	-2.2%
9	Pittsburgh	0.4%	11	-1.1%
10	St. Louis	0.3%	5	-0.4%
11	Philadelphia	0.2%	8	-0.7%
12	Seattle	0.1%	19	-2.5%
13	Minneapolis	0.0%	4	-0.4%
	U.S.	-0.1%		-1.3%
14	Cleveland	-0.4%	20	-3.7%
15	Tampa	-0.4%	16	-2.1%
16	Boston	-0.6%	13	-1.3%
17	Indianapolis	-1.0%	2	-0.2%
18	Denver	-1.0%	14	-1.5%
19	Atlanta	-1.5%	15	-1.7%
20	Dallas	-2.3%	9	-0.9%

Source: Bureau of Labor Statistics

GOVERNMENT EMPLOYMENT GROWTH 2000-2002 vs. 2002-2004				
2004 Rank	**Region**	**Average Annual Growth 2002-2004**	**2002 Rank**	**Average Annual Growth 2000-2002**
1	Raleigh	3.5%	12	1.2%
2	Charlotte	2.5%	2	3.4%
3	Dallas	1.9%	6	2.8%
4	Washington, DC	1.7%	8	2.1%
5	Atlanta	1.6%	1	4.0%
6	Indianapolis	0.8%	11	1.3%
7	Portland	0.7%	13	1.1%
8	Richmond	0.7%	10	1.3%
9	Seattle	0.7%	7	2.6%
10	Minneapolis	0.4%	15	0.9%
11	Tampa	0.3%	9	1.4%
12	Philadelphia	0.3%	16	0.9%
	U.S.	0.2%		1.7%
13	Austin	0.2%	4	2.9%
14	Denver	0.0%	5	2.8%
15	St. Louis	-0.3%	17	0.9%
16	Pittsburgh	-0.4%	19	0.6%
17	Cleveland	-0.9%	14	1.1%
18	San Diego	-1.1%	3	3.2%
19	**Baltimore**	**-1.3%**	**18**	**0.7%**
20	Boston	-1.6%	20	-0.1%

Source: Bureau of Labor Statistics

CHANGE IN HIGH TECH EMPLOYMENT, BY STATE 2000 and 2003			
Rank	**State**	**Region**	**% Change in High Tech Employment 2000-2003**
1	District of Columbia	Washington, DC	7.1%
2	**Maryland**	**Baltimore, DC Md. suburbs**	**-4.6%**
3	Florida	Tampa	-8.3%
4	Washington	Seattle	-9.2%
5	Virginia	Richmond, **DC Va. suburbs**	-9.6%
6	Missouri	St. Louis	-13.5%
7	Ohio	Cleveland	-14.9%
8	Oregon	Portland	-15.0%
9	Indiana	Indianapolis	-15.2%
10	Pennsylvania	Philadelphia, Pittsburgh	-15.9%
11	Georgia	Atlanta	-16.1%
12	Minnesota	Minneapolis	-17.2%
13	Massachusetts	Boston	-17.8%
14	California	San Diego	-18.6%
15	North Carolina	Charlotte, Raleigh	-18.8%
16	Texas	Austin, Dallas	-18.9%
17	Colorado	Denver	-20.5%

Source: Cyberstates 2005.
Data at the metropolitan area level not available.

ANNUAL UNEMPLOYMENT RATE 2002 and 2004				
2004 Rank	**Region**	**2004 Rate**	**2002 Rank**	**2002 Rate**
1	Washington DC	3.3	1	3.8
2	Raleigh	3.8	9	5.2
3	San Diego	3.9	3	4.3
4	Tampa	4.1	8	5.0
5	Richmond	4.2	2	4.1
6	Minneapolis	4.4	4	4.4
7	Atlanta	4.7	7	5.0
7	Austin	4.7	15	5.7
7	Indianapolis	4.7	5	4.5
10	**Baltimore**	**4.8**	**6**	**4.9**
10	Boston	4.8	10	5.3
12	Philadelphia	5.2	11	5.3
	U.S. Average	5.5		5.8
13	Denver	5.6	16	6.0
13	Pittsburgh	5.6	13	5.4
13	Seattle	5.6	18	6.7
16	Cleveland	5.9	12	5.4
17	Charlotte	6.0	17	6.3
18	Dallas	6.1	19	6.8
19	St. Louis	6.2	14	5.5
20	Portland	7.2	20	8.0

Source: Bureau of Labor Statistics

Tourism and Conventions

Employment in Greater Baltimore's leisure and hospitality sector increased by an average annual rate of 2.2 percent from 2002-2004, ranking the region 7th among the 20 regions and exceeding the 2.1 percent rate for the U.S. as a whole. The region improved from a rank of 14th for its growth rate from 2000 to 2002.

The Baltimore region's 8.7 percent leisure and hospitality employment in 2004 ranks it 14th, compared to a ranking of 15th in 2002.

The Baltimore metro area added 2,032 hotel rooms between 2002 and 2005. The region's 27,164 hotel rooms ranks it 14th – the same as in 2002.

The Baltimore Convention Center's 300,000 square feet of exhibit space ranks 11th among the 20 regions.

No new data on tourism gross metro product was not available for this report. However, data from 2002 ranks Greater Baltimore's $2.8 billion tourism GMP 13th among the 20 benchmark metros for 2002. Atlanta, Washington, D.C., Dallas and Boston are among the top 10 markets nationally with tourism GMPs of more than $6 billion each.

LEISURE AND HOSPITALITY EMPLOYMENT AS A PERCENT OF NON-FARM EMPLOYMENT
2002 and 2004

2004 Rank	Region	2004 Percent Leisure & Hospitality	2002 Rank	2002 Percent Leisure & Hospitality
1	San Diego	11.5%	1	10.9%
2	St. Louis	10.3%	2	9.9%
3	Denver	10.1%	3	9.9%
4	Austin	10.1%	5	9.5%
5	Indianapolis	9.7%	4	9.6%
	U.S.	9.5%		9.2%
6	Atlanta	9.3%	10	8.9%
7	Dallas	9.3%	7	9.0%
8	Seattle	9.3%	9	9.0%
9	Pittsburgh	9.3%	8	9.0%
10	Portland	9.2%	6	9.0%
11	Charlotte	9.0%	14	8.5%
12	Minneapolis	8.9%	13	8.6%
13	Raleigh	8.8%	11	8.9%
14	**Baltimore**	**8.7%**	**15**	**8.4%**
15	Tampa	8.7%	12	8.8%
16	Boston	8.6%	18	8.2%
17	Cleveland	8.6%	16	8.4%
18	Washington, DC	8.5%	17	8.3%
19	Richmond	8.1%	19	7.6%
20	Philadelphia	7.7%	20	7.4%

Source: Bureau of Labor Statistics

LEISURE AND HOSPITALITY EMPLOYMENT GROWTH 2000-2002 vs. 2002-2004				
2004 Rank	**Region**	**Average Annual Growth 2002-2004**	**2002 Rank**	**Average Annual Growth 2000-2002**
1	Richmond	4.6%	15	0.2%
2	San Diego	4.3%	3	1.9%
3	Austin	3.9%	9	1.4%
4	Charlotte	3.5%	16	0.2%
5	Washington, DC	3.3%	10	1.4%
6	Atlanta	2.6%	12	1.1%
7	**Baltimore**	**2.2%**	**14**	**0.8%**
8	Minneapolis	2.1%	5	1.8%
	U.S.	2.1%		0.5%
9	Philadelphia	2.1%	6	1.6%
10	Seattle	2.0%	19	-1.2%
11	St. Louis	1.7%	13	1.0%
12	Tampa	1.7%	4	1.8%
13	Portland	1.6%	18	-0.6%
14	Indianapolis	1.5%	8	1.5%
15	Dallas	1.2%	11	1.3%
16	Pittsburgh	1.2%	1	2.9%
17	Denver	1.1%	17	0.0%
18	Boston	1.0%	6	1.6%
19	Cleveland	0.9%	20	-1.5%
20	Raleigh	0.9%	2	2.0%

Source: Bureau of Labor Statistics

TOTAL HOTEL ROOMS, METRO AREA 2005			
Rank	**Rank Among Major Markets**	**Region**	**Rooms**
1	5	Atlanta	92,087
2	6	Washington, DC	90,468
3	8	Dallas	70,298
4	10	San Diego	54,013
5	14	Boston	47,274
6	16	Tampa	40,664
7	17	Philadelphia	40,555
8	21	Seattle	36,837
9	22	Denver	36,337
10	23	St. Louis	35,545
11	24	Minneapolis	34,557
12	30	Charlotte	30,269
13	33	Indianapolis	27,933
14	**35**	**Baltimore**	**27,164**
15	36	Austin	25,429
16	38	Portland	24,866
17	43	Raleigh	23,357
18	45	Pittsburgh	22,115
19	46	Cleveland	21,771
20	49	Richmond	19,174

Source: Smith Travel
MSAs based on 1993 OMB definitions.

CONVENTION CENTER SIZE

2005

Rank Among Benchmarks	Metro Area	Square Feet Exhibit Space 2002
1	Atlanta	1,400,000
2	Dallas	930,000
3	Washington, D.C.	725,000
4	San Diego	525,000
5	St. Louis	502,000
6	Minneapolis	475,000
7	Philadelphia	440,000
8	Indianapolis	430,000
9	Cleveland	375,000
10	Pittsburgh	313,000
11	**Baltimore**	**300,000**
12	Denver	288,000
13	Charlotte	280,000
14	Portland-Vancouver	255,000
15	Austin	246,000
16	Seattle	205,000
17	Tampa	200,000
18	Boston	193,000
19	Richmond	180,000
20	Raleigh-Durham	50,000

Source: Baltimore Convention Center

TOURISM GROSS METRO PRODUCT 2002			
Rank Among Benchmarks	**National Rank**	**Metro Area**	**Tourism GMP ($ millions)**
1	5	Atlanta	9,770
2	6	Washington, D.C.	9,074
3	7	Dallas	8,301
4	10	Boston	6,302
5	14	Minneapolis	5,113
6	16	San Diego	4,397
7	18	Seattle	4,001
8	21	Philadelphia	3,449
9	22	Denver	3,729
10	23	Tampa	3,520
11	24	St. Louis	3,337
12	29	Indianapolis	2,888
13	**30**	**Baltimore**	**2,818**
14	34	Charlotte	2,238
15	37	Portland-Vancouver	2,310
16	42	Cleveland	1,877
17	46	Raleigh-Durham	1,497
18	48	Austin	1,476
19	56	Greenville-Spartanburg	1,074
20	64	Richmond	812

Source: DRI-WEFA, for the U.S. Conference of Mayors "The Role of Travel and Tourism in America's Top 100 Metropolitan Areas," October 2002

Innovation, New Market Opportunities

Greater Baltimore ranked 12th nationally and 5th among the benchmark regions in 2003 for entrepreneurial dynamism. When joined with Washington, the combined metro area ranks 6th nationally and 4th among the metros studied for starting and growing businesses.

The entrepreneurial dynamism ranking used in previous State of the Region reports is no longer produced. However the new ranking that combines the Baltimore and Washington regions uses the same basic methodology. The following section includes charts showing the latest separate rankings for the Baltimore and Washington regions (in 2003) as well as the most recent (2005) ranking that combines the two regions.

Greater Baltimore ranks 10th among the 20 regions for value added per manufacturing production worker based on the 2002 Census of Manufacturers. Richmond, Raleigh-Durham and Austin rank as the top three markets for productivity.

ENTREPRENEURIAL DYNAMISM
2005

Rank	**Region**	**National Rank 2005**
1	Charlotte	2
2	Raleigh	3
3	Indianapolis	5
4	**Washington-Baltimore**	**6**
5	Atlanta	7
6	Austin	9
7	Denver	14
8	St. Louis	21
9	Dallas	22
10	San Diego	23
11	Cleveland	24
12	Boston	31
13	Seattle	40
14	Portland	41
15	Tampa	43
16	Minneapolis	45
17	Philadelphia	48
18	Pittsburgh	50
	Richmond (1)	

Source: Entrepreneur and NPRC's 2005 Hot Cities for Entrepreneurs.
MSAs based on 1993 OMB definitions. Baltimore combined with Washington in the ranking.

(1) Richmond ranked 20 nationally in midsize cities.

ENTREPRENEURIAL DYNAMISM
2002 and 2003

2003 Rank	Region	National Rank 2003	2002 Rank	National Rank 2002
1	Minneapolis	1	5	15
2	Washington	2	1	1
3	Atlanta	3	4	11
4	Charlotte	9	8	25
5	**Baltimore**	**12**	**9**	**30**
6	San Diego	16	7	24
7	Austin	20	6	17
8	Boston	23	11	35
9	Dallas	24	2	2
10	Tampa	25	13	40
11	Denver	27	10	32
12	St. Louis	38	18	60
13	Raleigh	40	3	3
14	Indianapolis	44	15	51
15	Philadelphia	46	16	56
16	Seattle	50	12	36
17	Pittsburgh	53	14	46
18	Portland	54	17	57
19	Cleveland	57	19	61
	Richmond	Not ranked		Not ranked

Source: Entrepreneur and D&B's 2003 Best Cities for Entrepreneurs.
MSAs based on 1993 OMB definitions.

MANUFACTURING: TOTAL VALUE ADDED 2002		
Rank	**Region**	**Value Added by Manufacture ($000)**
1	Philadelphia	$41,862,973
2	Dallas	$37,123,089
3	Boston	$32,321,310
4	Atlanta	$25,538,098
5	Seattle	$24,511,175
6	Minneapolis	$23,901,942
7	St. Louis	$19,759,458
8	Portland	$19,270,095
9	Charlotte	$17,937,297
10	Cleveland	$17,421,183
11	Richmond	$16,784,211
12	Indianapolis	$16,728,071
13	San Diego	$14,187,121
14	Austin	$12,444,916
15	Pittsburgh	$11,846,449
16	**Baltimore**	**$11,095,515**
17	Denver	$8,591,224
18	Raleigh-Durham	$8,460,133
19	Washington, DC	$8,251,283
20	Tampa	$7,429,135

Source: Bureau of the Census, Census of Manufacturers: Area Series, 2002

MANUFACTURING PRODUCTIVITY VALUE ADDED PER PRODUCTION WORKER
2002

Rank	Region	Value Added per Production Worker	Rank Per Employee	Value Added per Employee
1	Richmond	$471,692	1	$337,812
2	Raleigh-Durham	$446,280	2	$293,388
3	Austin	$414,969	3	$251,555
4	Charlotte	$275,789	4	$195,376
5	Portland	$261,538	6	$173,976
6	Seattle	$258,344	8	$146,935
7	Indianapolis	$256,216	5	$180,378
8	Philadelphia	$251,579	7	$165,887
9	Boston	$246,694	10	$139,296
10	**Baltimore**	**$214,030**	**11**	**$134,592**
11	Dallas	$207,960	12	$132,333
12	San Diego	$207,018	14	$121,128
13	Atlanta	$205,508	9	$143,586
14	St. Louis	$183,275	13	$131,816
15	Minneapolis	$183,130	17	$113,818
16	Denver	$181,721	15	$116,691
17	Tampa	$161,947	20	$102,638
18	Pittsburgh	$161,669	18	$109,855
19	Cleveland	$150,183	19	$106,471
20	Washington, DC	$102,861	16	$116,371

Source: Bureau of the Census, Census of Manufacturers: Area Series, 2002

Commercial Real Estate

Greater Baltimore ranks 3rd among the study regions for office vacancy with an index of 13.9, moving up two spots from 2002 and four spots from 2001. Washington, D.C. (10.3) and San Diego (10.4) have the tightest markets, while Dallas (24.4) and Atlanta (23.1) had the lowest rankings among the 17 regions for which data was available.

Greater Baltimore's office market size ranks 9th in this report and 19th nationally.

RANK OF OFFICE MARKET SIZE
2nd Quarter 2003 and Second Quarter 2005

2005 Rank	Region	2005 Q2 National Rank	2003 Rank	2003 Q2 National Rank
1	Washington, DC	2	1	2
2	Dallas	4	3	6
3	Boston	6	2	5
4	Atlanta	8	4	7
5	Philadelphia	10	6	11
6	Denver	11	5	10
7	Seattle	13	8	14
8	Minneapolis	16	9	17
9	**Baltimore**	**19**	**10**	**21**
10	San Diego	21	11	23
11	St. Louis	23	12	25
12	Portland	26	13	29
13	Cleveland	30	14	30
14	Tampa	31	15	31
15	Austin	33	17	36
16	Charlotte	34	16	35
17	Indianapolis	38	18	38
	Pittsburgh	NA	7	12
	Raleigh	NA		NA
	Richmond	NA		NA

Source: CB Richard Ellis, National Office Vacancy Index

OFFICE VACANCY RATE, METRO AREA
2002 and 2004

2004 Rank	Region	Average of 2004 Quarterly Office Vacancy Index	2002 Rank	Average of 2002 Quarterly Office Vacancy Index
1	Washington, DC	10.3	1	9.0
2	San Diego	10.4	2	10.8
3	**Baltimore**	**13.9**	**5**	**13.6**
4	Charlotte	15.4	6	13.7
5	Portland	15.7	14	17.6
6	Seattle	16.1	9	15.2
7	Philadelphia	16.4	3	13.0
8	Tampa	16.7	7	14.3
9	St. Louis	17.3	13	17.3
10	Minneapolis	18.1	8	14.7
11	Indianapolis	18.5	15	18.4
12	Boston	18.9	4	13.4
13	Cleveland	19.8	12	16.8
14	Austin	20.3	10	15.7
15	Denver	20.4	11	16.6
16	Atlanta	23.1	16	20.6
17	Dallas	24.4	17	22.1
	Pittsburgh	NA		NA
	Raleigh	NA		NA
	Richmond	NA		NA

Source: CB Richard Ellis Office Vacancy Index.
Annual rates computed by averaging quarterly rates.

CHANGE IN OFFICE VACANCY RATE, METRO AREA 2002 and 2004				
2004 Rank	**Region**	**2002-2004 Net Change in Office Vacancy Rate**	**2002 Rank**	**2000-2002 Net Change in Office Vacancy Rate**
1	Portland	-1.9	15	10.3
2	San Diego	-0.4	2	4.5
3	St. Louis	0.0	12	6.9
4	Indianapolis	0.1	11	6.8
5	**Baltimore**	**0.3**	**6**	**5.5**
6	Seattle	0.9	17	11.1
7	Washington, DC	1.3	3	4.6
8	Charlotte	1.7	5	5.0
9	Dallas	2.4	10	6.8
10	Tampa	2.4	1	2.0
11	Atlanta	2.5	14	9.6
12	Cleveland	3.0	7	5.5
13	Minneapolis	3.3	8	6.1
14	Philadelphia	3.4	4	4.7
15	Denver	3.8	13	7.5
16	Austin*	4.6	9	6.7
17	Boston**	5.5	16	11.0
	Pittsburgh	NA		NA
	Raleigh	NA		NA
	Richmond	NA		NA

Source: CB Richard Ellis Office Vacancy Index.
2000 data for Austin based on 1 quarter.
**2000 data for Boston based on 3 quarters.

OFFICE VACANCY RATE, CENTRAL BUSINESS DISTRICT 2002 and 2004				
2004 Rank	**Region**	**Average of 2004 Quarterly Office Vacancy Index**	**2002 Rank**	**Average of 2002 Quarterly Office Vacancy Index**
1	Washington, DC	8.3	1	5.6
2	Charlotte	9.0	3	8.9
3	San Diego	9.3	4	9.4
4	Philadelphia	11.2	5	11.3
5	Portland	11.3	7	12.7
6	Boston	12.7	2	8.9
7	Seattle	15.3	9	14.3
8	Denver	15.6	11	14.5
9	Indianapolis	16.1	15	18.6
10	Tampa	16.9	10	14.4
11	**Baltimore**	**17.3**	**6**	**12.2**
12	St. Louis	20.1	16	19.2
13	Cleveland	20.6	12	14.8
14	Minneapolis	20.9	8	14.2
15	Atlanta	21.2	14	18.4
16	Austin	22.3	13	17.3
17	Dallas	24.7	17	24.3
	Pittsburgh	NA		NA
	Raleigh	NA		NA
	Richmond	NA		NA

Source: CB Richard Ellis Office Vacancy Index.
Annual rates computed by averaging quarterly rates.

OFFICE LEASE RATES 2005, 1st Half			
Rank	**Region**	**Rate Per Square Foot**	**% Change 12 Months**
1	Dallas	$ 17.68	1.6%
1	Denver	$ 17.68	0.1%
3	Charlotte	$ 18.31	-3.2%
4	Raleigh	$ 18.99	-2.0%
5	Minneapolis (CBD)	$ 19.00	17.4%
6	Austin	$ 19.06	3.5%
7	Indianapolis	$ 19.18	0.8%
8	Atlanta (suburban)	$ 19.57	0.8%
9	Tampa	$ 19.79	0.7%
10	Philadelphia	$ 20.63	4.2%
11	Atlanta (CBD)	$ 20.89	-0.5%
12	Portland	$ 21.22	-2.6%
13	Pittsburgh	$ 21.39	2.5%
14	St. Louis	$ 21.76	2.7%
15	Cleveland	$ 21.79	12.7%
16	Seattle (suburban)	$ 21.93	1.8%
17	Boston (suburban)	$ 22.53	8.8%
18	**Baltimore**	**$ 22.70**	**6.6%**
19	Seattle (CBD)	$ 24.71	-4.4%
20	Washington, DC (suburban)	$ 26.80	8.4%
21	San Diego	$ 31.49	11.4%
22	Boston (CBD)	$ 39.65	0.6%
23	Washington, DC (CBD)	$ 41.84	6.5%
	Richmond	NA	NA

Source: CB Richard Ellis Global Market Rates

EDUCATION AND WORKFORCE

Greater Baltimore moved into first place for research and development funding at academic institutions with $1.637 billion invested in 2003. Boston was 2nd, well ahead of third place Philadelphia. Indianapolis and Charlotte trailed the 20 benchmarks with little or no R&D investment.

Greater Baltimore's college education attainment rate in 2004 of 29.7 percent ranks the region 9th, an improvement of two places from its rank of 11th in 2000. The Baltimore region's high school attainment of 82.4 percent ranks 16th – the same as its ranking in 2000.

COLLEGE EDUCATION ATTAINMENT, PERSONS 25 AND OLDER 2004

Rank	Region	Percent Completed Bachelor's Degree or More
1	Washington, DC	42.3%
2	Raleigh	37.8%
3	Boston	36.8%
4	Austin	36.6%
5	Denver	34.5%
6	Minneapolis	33.2%
7	Seattle	32.5%
8	Atlanta	31.0%
9	**Baltimore**	**29.7%**
9	San Diego	29.7%
11	Dallas	29.2%
12	Portland	28.8%
13	Charlotte	28.4%
14	Philadelphia	28.0%
15	Richmond	27.7%
16	Indianapolis	27.1%
17	St. Louis	24.8%
18	Cleveland	24.0%
19	Pittsburgh	23.6%
20	Tampa	22.1%

Source: Claritas

HIGH SCHOOL EDUCATIONAL ATTAINMENT, PERSONS 25 AND OLDER 2004		
Rank	**Region**	**Percent Completed High School or More**
1	Minneapolis	90.7%
2	Seattle	89.3%
3	Portland	87.3%
4	Washington, DC	87.1%
5	Denver	86.8%
6	Boston	86.6%
7	Raleigh	86.4%
8	Austin	85.1%
9	Pittsburgh	85.0%
10	Indianapolis	84.7%
11	Atlanta	83.5%
12	St. Louis	83.2%
13	Cleveland	83.1%
14	Philadelphia	82.6%
15	San Diego	82.5%
16	**Baltimore**	**82.4%**
17	Charlotte	81.7%
17	Tampa	81.7%
19	Richmond	81.5%
20	Dallas	80.6%

Source: Claritas

TOTAL FULL-TIME EQUIVALENT ENROLLMENT IN COLLEGES AND UNIVERSITIES 2000-2001		
Rank	**Region**	**Total FTE Enrollment 2000-01**
1	Philadelphia	176,559
2	Boston	163,053
3	San Diego	140,027
4	Atlanta	138,548
5	Minneapolis	110,499
6	Washington, DC	109,337
7	Dallas	101,901
8	Pittsburgh	94,911
9	Seattle	94,786
10	Austin	82,568
11	Raleigh	78,112
12	**Baltimore**	**74,522**
13	St. Louis	71,002
14	Denver	67,340
15	Tampa	63,419
16	Portland	54,678
17	Cleveland	45,343
18	Charlotte	41,076
19	Indianapolis	33,278
	Richmond	NA

Source: Atlanta Regional Commission for Higher Education
Higher Education in America's Metropolitan Areas
Note: Regions are based on 1993 OMB definitions.

TOTAL COLLEGE ENROLLMENT PER 100,000 POPULATION 2000-2001		
Rank	**Region**	**Total FTE Enrollment Per 100,000 Population**
1	Austin	6,607
2	Raleigh	6,575
3	San Diego	5,378
4	Boston	4,786
5	Pittsburgh	4,024
6	Seattle	3,926
7	Minneapolis	3,722
8	Philadelphia	3,461
9	Atlanta	3,369
10	Denver	3,193
11	**Baltimore**	**2,919**
12	Dallas	2,896
13	Portland	2,851
14	Charlotte	2,740
15	St. Louis	2,727
16	Tampa	2,647
17	Washington, DC	2,221
18	Indianapolis	2,070
19	Cleveland	2,014
	Richmond	NA

Source: Atlanta Regional Commission for Higher Education
Higher Education in America's Metropolitan Areas
Note: Regions are based on 1993 OMB definitions.

ACADEMIC RESEARCH AND DEVELOPMENT EXPENDITURES BY METRO AREA FY 2003		
Rank	**Region**	**R&D Funding ($000)**
1	**Baltimore**	**1,637,156**
2	Boston	1,482,592
3	Philadelphia	939,700
4	Atlanta	794,807
5	San Diego	714,607
6	Seattle	684,814
7	Washington	663,031
8	Pittsburgh	602,883
9	St. Louis	545,436
10	Minneapolis	511,905
11	Dallas	368,835
12	Austin	343,854
13	Raleigh	287,286
14	Cleveland	265,699
15	Denver	261,601
16	Tampa	213,249
17	Portland	200,295
18	Richmond	135,697
19	Charlotte	12,599
20	Indianapolis	0

Source: National Science Foundation

TRANSPORTATION

BWI Thurgood Marshall Airport is the nation's 25th largest airport, serving over 20.8 million passengers in 2004. This ranks Baltimore 10th among the 20 benchmarks. Atlanta, Dallas and Denver have the largest airports among the 20 metro areas, while Richmond, Austin, Indianapolis and Raleigh have the smallest.

BWI Thurgood Marshall Airport grew its passenger base by 9.5 percent from 2002 to 2004, placing Baltimore 10th among the 20 regions from air passenger growth. Washington, D.C. realized the most growth at 28.9 percent, spurred by renewed flights at Reagan National and growth at Dulles. St. Louis (-47.8 percent) and Pittsburgh (-26.4 percent) realized the only declines among the 20 metros, with both airports struggling after their hubs were downsized by American and US Airways, respectively.

In a measurement newly added to the State of the Region reports, Greater Baltimore ranks 6th for mass transit use among the 20 regions, with more than 640 million passenger miles and 113 million passenger trips. This measure is based on all transit modes, including heavy rail, light rail, bus and trolley bus.

Greater Baltimore ranks 7th for average weekday trips for all modes, 5th for heavy rail (41,900 average weekday trips), 9th for light rail (14,500 average weekday trips), and 7th for bus and trolley (203,500 average weekday trips). Baltimore's light rail figures topped 28,000 in 2002, however this figure has dropped in half recently due to double-tracking work that closed the light rail line north of Baltimore.

The Baltimore region ranks 5th in transit ridership per capita.

Washington, D.C., Boston and Philadelphia have the largest transit systems among the 20 metros.

Meanwhile, the Greater Baltimore region continues to rank 18th among the 20 metros for average time of commute, which was 32.1 minutes in 2004. Only Atlanta and Washington, D.C. had longer commute times, while Indianapolis and Minneapolis ranked 1st and 2nd respectively.

AVERAGE AIR FARE YIELD, COST PER MILE
2003 Q1 and 2005 Q1

2005 Q1 Rank	Region	2005 Q1 (cents)	2003 Q1 Rank	2003 Q1 (cents)
1	Seattle	12.2	1	12.9
2	San Diego	12.5	3	13.5
2	Tampa	12.5	4	13.9
4	**Baltimore**	**12.8**	**2**	**13.3**
5	Indianapolis	13.1	5	14.3
6	Philadelphia	13.3	10	18.3
7	Boston	13.4	8	17.7
8	Portland	14.3	5	14.3
9	Denver	16.4	7	16.7
10	Minneapolis	16.6	13	19.1
10	Raleigh	16.6	8	17.7
12	Cleveland	16.9	12	18.8
12	Washington, DC	16.9	15	20.6
14	Austin	18.0	11	18.4
14	Pittsburgh	18.0	16	20.8
16	St. Louis	18.6	14	20.1
17	Atlanta	18.9	17	20.9
18	Dallas	19.3	18	22.7
19	Charlotte	27.2	19	27.3
20	Richmond	33.9	20	NA

*Total Revenue Divided by Total Revenue-Passenger-Miles
Source: U.S. Department of Transportation, Office of Aviation Analysis
MSAs based on 1993 OMB definitions.

TOTAL AIR PASSENGERS
2002 and 2004

2004 Rank	2004 National Rank	Region	2004 Total Passengers	2002 Rank	2002 Total Passengers
1	1	Atlanta (Hartsfield Atlanta Intl)	83,606,583	1	76,876,128
2	4 + 54	Dallas (Dallas/Ft. Worth Intl + Love Field)	65,301,973	2	58,451,327
3	5	Denver (Denver Intl)	42,393,766	3	35,651,098
4	21 + 30	Washington, DC (Dulles Intl & Reagan Natl)	38,592,303	5	29,947,850
5	9	Minneapolis (Minneapolis/St. Paul Intl)	36,713,173	4	32,628,331
6	16	Seattle (Seattle/Tacoma Intl)	28,804,554	6	26,690,843
7	17	Philadelphia (Philadelphia Intl)	28,507,420	8	24,799,470
8	18	Boston (Logan Intl)	26,142,516	10	22,696,141
9	19	Charlotte (Douglas Intl)	25,534,374	9	23,597,926
10	**25**	**Baltimore (BWI Thurgood Marshall)**	**20,818,133**	**11**	**19,012,529**
11	28	Tampa (Tampa Intl)	17,396,836	13	15,494,668
12	29	San Diego (San Diego Intl)	16,377,304	14	14,931,854
13	32	St. Louis (Lambert/St. Louis Intl)	13,384,757	7	25,626,114
14	33	Pittsburgh (Pittsburgh Intl)	13,271,709	12	18,027,165
15	34	Portland (Portland Intl)	13,038,057	15	12,241,975
16	35	Cleveland (Hopkins Intl)	11,264,937	16	10,455,204
17	43	Raleigh (Raleigh-Durham Intl)	8,599,564	17	8,514,861
18	45	Indianapolis (Indianapolis Intl)	8,025,051	18	6,896,418
19	46	Austin (Austin-Bergstrom Intl)	7,238,645	19	6,699,002
20	78	Richmond (Richmond Intl)	2,496,230	20	2,360,418

Source: Airports Council International

AIR PASSENGER GROWTH
2002 – 2004

2004 Rank	Region	Percent Change 2002-2004
1	Washington, DC (Reagan Natl & Dulles Intl)	28.9%
2	Denver (Denver Intl)	18.9%
3	Indianapolis (Indianapolis Intl)	16.4%
4	Boston (Logan Intl)	15.2%
5	Philadelphia (Philadelphia Intl)	15.0%
6	Minneapolis (Minneapolis/St. Paul Intl)	12.5%
7	Tampa (Tampa Intl)	12.3%
8	Dallas (Dallas/Ft. Worth Intl + Love Field)	11.7%
9	San Diego (San Diego Intl)	9.7%
10	**Baltimore (BWI Thurgood Marshall)**	**9.5%**
11	Atlanta (Hartsfield Atlanta Intl)	8.8%
12	Charlotte (Douglas Intl)	8.2%
13	Austin (Austin-Bergstrom Intl)	8.1%
14	Seattle (Seattle/Tacoma Intl)	7.9%
15	Cleveland (Hopkins Intl)	7.7%
16	Portland (Portland Intl)	6.5%
17	Richmond (Richmond Intl)	5.8%
18	Raleigh (Raleigh-Durham Intl)	1.0%
19	Pittsburgh (Pittsburgh Intl)	-26.4%
20	St. Louis (Lambert/St. Louis Intl)	-47.8%

Source: Airports Council International

WORKERS 16 AND OLDER USING PUBLIC TRANSPORTATION 2000 and 2004				
2004 Rank	**Region**	**2004 Percent**	**2000 Rank**	**2000 Percent**
1	Boston	11.2%	1	11.4%
2	Washington, DC	11.0%	1	11.4%
3	Philadelphia	8.7%	3	9.0%
4	Seattle	6.9%	4	7.0%
5	Portland	6.1%	5	6.3%
6	**Baltimore**	**5.9%**	**6**	**6.2%**
6	Pittsburgh	5.9%	7	6.0%
8	Denver	4.3%	8	4.5%
9	Minneapolis	4.2%	8	4.5%
10	Cleveland	4.1%	10	4.2%
11	San Diego	3.4%	12	3.4%
12	Atlanta	3.3%	11	3.6%
13	Austin	2.3%	13	2.6%
14	St. Louis	2.2%	14	2.3%
15	Richmond	1.9%	15	2.0%
16	Dallas	1.7%	16	1.8%
17	Charlotte	1.4%	17	1.5%
17	Tampa	1.4%	18	1.4%
19	Indianapolis	1.3%	18	1.4%
20	Raleigh	1.0%	20	1.1%

Source: Claritas

AVERAGE TRAVEL TIME TO WORK
2000 and 2004

Rank 2004	Region	2004 Minutes	Rank 2000	2000 Minutes
1	Indianapolis	26.0	1	25.9
2	Minneapolis	26.1	1	25.9
3	Cleveland	26.3	3	26.3
4	Portland	26.7	4	26.7
5	Richmond	27.2	5	27.1
6	San Diego	27.4	6	27.4
7	Pittsburgh	27.5	7	27.5
8	Tampa	27.8	7	27.5
9	St. Louis	27.9	9	27.7
10	Austin	28.2	9	27.7
11	Raleigh	28.3	11	28.2
12	Charlotte	28.5	12	28.3
13	Denver	29.3	13	29.0
14	Dallas	29.9	14	29.6
15	Seattle	30.0	15	29.9
16	Philadelphia	30.5	16	30.5
17	Boston	31.1	17	31.0
18	**Baltimore**	**32.1**	**18**	**32.0**
19	Atlanta	33.8	19	33.6
20	Washington, DC	35.9	20	35.7
Source: Claritas				

Source: Claritas

TRANSPORTATION RANKING
2004

Rank	Region	National Ranking
1	Denver	10
2	Dallas	11
3	Seattle	13
4	Boston	14
5	Atlanta	16
6	Philadelphia	20
7	Pittsburgh	23
8	St. Louis	44
9	Minneapolis	47
10	Portland	51
11	Washington, DC	83
12	Cleveland	88
13	San Diego	97
14	**Baltimore**	**125**
15	Tampa	160
16	Indianapolis	190
17	Austin	194
18	Charlotte	214
19	Richmond	219
20	Raleigh	258

Source: Cities Ranked & Rated, 2004
MSAs based on 1993 OMB definitions.

TRANSIT USE: PASSENGER TRIPS URBANIZED AREAS OVER 1,000,000 POPULATION FY 2003		
Rank	**Region**	**Unlinked Passenger Trips (000's)**
1	Washington, DC	434,313.1
2	Boston	394,926.8
3	Philadelphia	337,727.3
4	Seattle	151,784.7
5	Atlanta	148,976.7
6	**Baltimore**	**113,229.2**
7	Portland	105,635.0
8	San Diego	93,287.2
9	Dallas	85,791.9
10	Denver	78,584.3
11	Minneapolis	73,343.6
12	Pittsburgh	71,354.5
13	Cleveland	60,568.5
14	St. Louis	48,069.6
15	Tampa	20,076.5
16	Indianapolis	11,324.6
	Austin	NA
	Charlotte	NA
	Raleigh	NA
	Richmond	NA

Source: Federal Transit Administration
MSAs are based on 1993 OMB definitions.
Data for some areas may be understated since not all transit agencies report it; data for some areas may be overstated since some transit agencies serve other urbanized areas and only agency-total data are reported.

TRANSIT RIDERSHIP (ALL MODES)
First Quarter 2005

Rank	Region	Average Weekday Unlinked Trips All Modes
1	Washington, DC	1,155,200
2	Boston	1,130,800
3	Philadelphia	1,026,900
4	Atlanta	463,900
5	Seattle	356,200
6	Portland	312,400
7	**Baltimore**	**288,000**
8	Pittsburgh	233,000
9	Minneapolis	220,900
10	Denver	222,800
11	Cleveland	194,400
12	San Diego	215,400
13	Dallas	198,900
14	St. Louis	140,900
15	Austin	119,700
16	Charlotte	83,100
17	Tampa	35,800
18	Richmond	35,600
19	Indianapolis	25,900
	Raleigh	NA

Source: American Public Transportation Association
Data for some areas may be overstated or understated since some transit agencies serve other urbanized areas and only agency-total data are available.

TRANSIT RIDERSHIP PER CAPITA 2005				
Rank	Region	Ridership per 1,000 residents	Region population (1)	Average Weekday Transit Ridership (2)
1	Washington D.C.	294	3,933,920	1,155,200
2	Boston	280	4,032,484	1,130,500
3	Philadelphia	199	5,149,079	1,026,900
4	Portland-Vancouver	189	1,583,138	300,000
5	**Baltimore**	**139**	**2,076,354**	**288,000**
6	Pittsburgh	133	1,753,136	233,000
7	Austin	133	901,920	119,700
8	Atlanta	133	3,499,840	463,900
9	Seattle	131	2,712,205	356,200
10	Denver	112	1,984,889	222,800
11	Charlotte	109	758,927	83,100
12	Cleveland	109	1,786,617	194,400
13	Minneapolis- St. Paul	92	2,388,593	220,900
14	San Diego	81	2,674,436	215,400
15	St. Louis	68	2,077,662	140,900
16	Dallas	48	4,145,659	198,900
17	Richmond	43	818,836	35,600
18	Indianapolis	21	1,218,919	25,900
19	Tampa	17	2,062,339	35,800
	Raleigh-Durham	N/A	829,323	N/A

(1) U.S. Census, Population of Urbanized Areas, 2000
(2) American Public Transportation Association, First Quarter 2005

TRANSIT RIDERSHIP (HEAVY RAIL) First Quarter 2005			
Rank	**Region**	**Transit Agency**	**Average Weekday Unlinked Trips All Modes**
1	Washington, DC	Washington Metro Area TA	880,000
2	Boston	Massachusetts Bay Trp Auth	414,900
3	Philadelphia	Southeastern Pennsylvania TA	299,900
4	Atlanta	Metro Atlanta Rapid TA	225,200
5	**Baltimore**	**Maryland Transit Admin.**	**41,900**
6	Cleveland	Greater Cleveland Reg TA	18,200

Source: American Public Transportation Association

TRANSIT RIDERSHIP (LIGHT RAIL) First Quarter 2005			
Rank	**Region**	**Transit Agency**	**Average Weekday Unlinked Trips All Modes**
1	Boston	Massachusetts Bay Trp Auth	173,300
2	Portland	Tri-County Metro Trp Dist	95,500
3	San Diego	San Diego Trolley	80,000
4	Philadelphia	Southeastern Pennsylvania TA	63,500
5	Dallas	Dallas Area Rapid Transit	58,700
6	St. Louis	METRO	38,100
7	Pittsburgh	Port Authority of Allegheny Co	23,900
8	Minneapolis	Metro Transit	18,000
9	**Baltimore (1)**	**Maryland Transit Admin.**	**14,500**
10	Cleveland	Greater Cleveland Reg TA	8,700
11	Seattle	Sound Transit	3,400
12	Tampa	Hillsborough Area Reg TA	900
13	Denver	Regional Tran Dist	NA

Source: American Public Transportation Association

(1) Low figure due to line closures north of Baltimore for double tracking work. Average weekday ridership approx. 28,000 when entire system is up and running.

FAREBOX RECOVERY FOR RAIL SERVICE
2003

Rank		Mode(1)	Fare Revenues Earned (2)	Total Operating Expenses (2)	Farebox Recovery Percentage
1	Portland-Vancouver	LR	36,044,941	55,295,890	65%
2	San Diego	LR	22,071,207	38,985,869	57%
3	Boston	LR	49,244,588	103,742,323	47%
4	Denver	LR	7,463,388	20,068,211	37%
5	Philadelphia	LR	14,875,487	43,854,471	34%
6	St. Louis	LR	9,931,774	36,707,035	27%
7	Tampa	LR	407,683	1,844,780	22%
8	Pittsburgh	LR	5,904,385	31,907,803	19%
9	Cleveland	LR	2,033,341	12,694,206	16%
9	**Baltimore**	**LR**	**5,491,392**	**34,501,547**	**16%**
10	Seattle	LR	218,928	1,421,503	15%
11	Dallas	LR	7,566,368	57,543,280	13%
1	Washington D.C.	HR	292,800,830	487,504,822	60%
2	Philadelphia	HR	70,443,228	123,278,956	57%
3	Boston	HR	89,509,107	213,986,001	42%
4	Atlanta	HR	43,286,022	129,475,010	33%
5	**Baltimore**	**HR**	**9,824,623**	**40,944,954**	**24%**
6	Cleveland	HR	4,743,315	23,353,518	20%

(1) LR-Light Rail; HR-Heavy Rail
(2) From 2003 National Transit Database, Federal Transit Administration

QUALITY OF LIFE

Cost of Living

The most significant change for Greater Baltimore from the 2003 to the 2005 report relates to cost of living. Greater Baltimore dropped from 3rd place among the 20 regions to 15th. The region is beginning to resemble high priced markets, such as San Diego, Washington, D.C., and Boston. Indianapolis, Charlotte, Pittsburgh, Raleigh, Dallas, St. Louis, Austin, Atlanta and Tampa continue to have costs of living below the U.S. average.

The primary driver of Greater Baltimore's dramatic cost of living increase is housing. The region ranks 16th among the 20 benchmarks with a median home price of $239,600 in 2004. Greater Baltimore's home prices rose 33.4 percent from 2002 to 2004, ranking 3rd among the 20 markets, and this figure continued to rise during 2005. San Diego, Boston and Washington, D.C. are the most expensive markets among the 20 metros. Pittsburgh, Indianapolis, St. Louis and Cleveland are the least expensive markets.

HOMEOWNERSHIP RATES
2001 and 2004

Rank 2004	Region	Homeownership Rate 2004, %	Rank 2001	Homeownership Rate 2001, %
1	Pittsburgh	74.9	6	71.8
2	Philadelphia	74.1	2	73.6
3	Cleveland	73.9	5	72.8
3	Minneapolis	73.9	4	73.5
3	St. Louis	73.9	7	70.9
6	Indianapolis	73.1	7	70.9
7	Tampa	71.5	9	70.7
8	**Baltimore**	**71.3**	**11**	**68.0**
9	Denver	71.0	12	67.7
10	Charlotte	70.4	2	73.6
11	Washington, DC	69.7	10	69.5
12	Richmond	69.5	1	76.2
13	Atlanta	68.4	13	66.6
14	Raleigh	67.7	17	62.9
15	Portland	66.9	15	65.3
16	San Diego	65.7	16	64.0
17	Seattle	64.1	14	66.0
18	Dallas	63.0	18	62.8
19	Austin	62.1	20	57.7
20	Boston	59.4	19	59.0

Source: Bureau of the Census, Housing Vacancies and Homeownership Annual Statistics
MSAs based on 1993 OMB definitions.

COST OF LIVING Second Quarter 2005 and Third Quarter 2003				
2005 Rank	**Region**	**100% Composite Index, 2005**	**2003 Rank**	**100% Composit e Index, 2003**
1	Indianapolis	91.2	1	92.4
2	Charlotte	93.1	6	96.3
3	Pittsburgh	93.2	9	97.6
4	Raleigh	93.3	7	96.7
5	Dallas	94.4	5	96.0
6	St. Louis	96.8	12	103.8
7	Austin	97.1	2	93.0
8	Atlanta	97.3	8	96.9
9	Tampa	98.8	4	95.2
10	Cleveland	102.0	11	101.5
11	Denver	103.0	13	105.2
12	Richmond	105.2	10	100.3
13	Portland	115.6	15	111.9
14	Seattle	116.4	16	119.5
15	**Baltimore**	**118.5**	**3**	**94.0**
16	Philadelphia	125.4	17	120.4
17	Boston	137.4	18	135.0
18	Washington, DC	141.4	19	137.7
19	San Diego	152.1	20	138.0
	Minneapolis	NA	14	110.2

Source: ACCRA Cost of Living Index
Seattle is 2003 Q2 rather than Q3 data.

MEDIAN HOME PRICES
Existing Single-Family Homes
2002 and 2004

2004 Rank	Region	2004 ($000)	2002 Rank	2002 ($000)
1	Pittsburgh	111.9	1	101.5
2	Indianapolis	121.7	2	116.8
3	St. Louis	126.3	3	117.0
4	Cleveland	136.4		N/A
5	Dallas	138.2	5	135.2
6	Austin	154.7	10	156.5
7	Atlanta	156.9	8	146.5
8	Tampa	159.7	4	133.5
9	Charlotte	168.0	9	149.1
10	Richmond	170.7	6	142.3
11	Raleigh	182.9	11	172.2
12	Philadelphia	186.4	7	146.1
13	Portland	210.0	13	180.4
14	Minneapolis	217.4	14	185.0
15	Denver	239.1	15	228.1
16	**Baltimore**	**239.6**	**12**	**179.6**
17	Seattle	294.9	17	254.0
18	Washington DC	350.0	16	250.2
19	Boston	387.4		N/A
20	San Diego	551.6	18	364.2

Source: National Association of Realtors
MSAs based on 1993 OMB definitions.

GROWTH IN MEDIAN HOME PRICES
Existing Single-Family Homes
2002-2004

Rank	Region	% Change 2002-2004
1	San Diego	51.5%
2	Washington DC	39.9%
3	**Baltimore**	**33.4%**
4	Philadelphia	27.6%
5	Richmond	20.0%
6	Tampa	19.6%
7	Minneapolis	17.5%
8	Portland	16.4%
9	Seattle	16.1%
10	Charlotte	12.7%
11	Pittsburgh	10.2%
12	St. Louis	7.9%
13	Atlanta	7.1%
14	Raleigh	6.2%
15	Denver	4.8%
16	Indianapolis	4.2%
17	Dallas	2.2%
18	Austin	-1.2%
	Boston	N/A
	Cleveland	N/A

Source: National Association of Realtors
MSAs based on 1993 OMB definitions.

Health Care

Another significant cost of living change for Greater Baltimore was in health care. The region ranked 2nd among the 20 benchmarks in the 2003 report with average costs below the U.S. average. In this report, the region ranks 11th with costs 6 percent above the U.S. average. Boston and San Diego are the most expensive markets. Pittsburgh and St. Louis are least expensive.

Eight of the 20 benchmark metros have hospitals listed in U.S. News & World Report's 2005 best hospitals rankings. Greater Baltimore has the top-ranked hospital -- Johns Hopkins. Boston has two hospitals listed among the nation's best – Massachusetts General (No. 2 nationally) and Brigham and Women's Hospital (No. 12 nationally). Cleveland, St. Louis, Seattle, Boston, Pittsburgh and Philadelphia also have top hospitals.

The Baltimore region ranks 2nd in physicians per capita, up one place from its 3rd place ranking in 2000.

HEALTH CARE COST
2004

Rank	Region	National Ranking
1	Raleigh	65
2	Richmond	71
3	St. Louis	82
4	Portland	92
5	Seattle	162
6	Pittsburgh	165
7	Denver	179
8	Charlotte	188
9	Minneapolis	192
10	**Baltimore**	**212**
11	Washington, DC	223
12	Boston	235
13	Atlanta	244
14	Tampa	245
15	Cleveland	253
16	Austin	255
17	Philadelphia	279
18	Indianapolis	289
19	San Diego	300
20	Dallas	306

Source: Cities Ranked & Rated, 2004

PHYSICIANS
2004

2004 Rank	Region	2004 Physicians per 100,000 Population*
1	Boston	565
2	**Baltimore**	**490**
3	Cleveland	477
4	Philadelphia	468
5	Washington, DC	451
6	Pittsburgh	410
7	Indianapolis	400
8	Seattle	388
9	Richmond	365
10	San Diego	364
11	Portland	360
12	Denver	353
13	St. Louis	350
14	Tampa	324
15	Minneapolis	314
16	Atlanta	272
17	Charlotte	256
18	Dallas	250
19	Austin	244
20	Raleigh	238

Source: American Medical Association.
*Physicians Includes Generalists and Specialists

BEST HOSPITALS
2005

Rank	National Rank	Region	Hospital
1	**1**	**Baltimore**	**Johns Hopkins Hospital**
2	3	Boston	Massachusetts General Hospital
3	4	Cleveland	Cleveland Clinic
4	6	St. Louis	Barnes-Jewish Hospital/Washington University
5	9	Seattle	University of Washington Medical Center
6	12	Boston	Brigham and Women's Hospital
7	13	Pittsburgh	University of Pittsburgh Medical Center
8	15	Philadelphia	Hospital of the University of Pennsylvania

Source: U.S. News & World Report, July 18, 2005.

CANCER HOSPITALS IN THE TOP 50
2005

Rank	Region	Hospital	U.S. News & World Report Score
1	**Baltimore**	**Johns Hopkins Hospital**	**72.4**
2	Boston	Dana - Farber Cancer Institute	71.3
3	Pittsburgh	University of Pittsburgh Medical Center	39.7
4	Seattle	University of Washington Medical Center	39.5
5	Boston	Massachusetts General Hospital	39.1
6	Tampa	H. Lee Moffitt Cancer Center and Research Institute	38.9
6	Cleveland	Cleveland Clinic	38.9
8	Philadelphia	Fox Chase Cancer Center	38.8
9	Cleveland	University Hospitals of Cleveland	37.4
10	St. Louis	Barnes - Jewish Hospital/Washington University	37.3
11	Minneapolis	University of Minnesota Medical Center	36.2
12	Denver	University of Colorado Hospital	36.1
13	Philadelphia	Hospital of the University of Pennsylvania	35.6
14	Boston	Brigham and Women's Hospital	34.7
15	Washington, DC	Inova Fairfax Hospital	33.4
16	San Diego	University of California, San Diego Medical Center	33.1
17	Indianapolis	Clarian Health Partners (IU and Methodist Hospitals)	32.7
18	**Baltimore**	**Greater Baltimore Medical Center**	**32.6**

Source: U.S. News & World Report

CANCER DEATH RATES
2003

Rank	Region	2003 Cancer Deaths Per 1,000 Population
1	Austin (1)	1.2
2	Atlanta	1.3
3	Raleigh	1.3
4	Denver	1.3
5	Washington, DC (2)	1.5
6	Minneapolis	1.5
7	San Diego	1.6
8	Charlotte	1.6
9	Seattle	1.6
10	Portland	1.8
11	Indianapolis	1.8
12	Boston (3)	2.0
13	Richmond	2.0
14	**Baltimore**	**2.0**
15	St. Louis	2.1
16	Philadelphia	2.2
17	Cleveland (4)	2.4
18	Tampa	2.5
19	Pittsburgh	2.7
20	Dallas (1)	3.4

Sources: State Health Departments.
(1) Data is for 2002.
(2) DC data is for 2002; WV counties average of 1997-2001.
(3) NH counties are average of 1999-2001.
(4) Data is average of 2000-2002.

INFANT MORTALITY RATE
2003

Rank	Region	Infant Mortality Rate
1	Portland	4.2
2	Minneapolis (1)	4.5
3	San Diego	4.6
4	Austin (2)	4.7
5	Boston (3)	4.8
6	Seattle	5.3
7	Denver	5.8
8	Dallas (2)	6.4
9	Raleigh	6.8
10	Washington, DC (4)	7.2
11	Atlanta	7.2
12	Pittsburgh	7.5
13	Charlotte (5)	7.6
14	Philadelphia	7.7
15	Indianapolis	7.8
16	Tampa	8.2
17	Richmond	8.2
18	St. Louis	8.5
19	**Baltimore**	**8.6**
20	Cleveland (2)	9.2

Sources: State Health Departments.
(1) WI county data is for 2002.
(2) Data is for 2002.
(3) Excludes NH counties.
(4) DC data is for 2002; WV counties average of 1997-2001.
(5) SC county data is for 2002.

Arts, Culture and Recreation

Two recent rankings placed Greater Baltimore among the top arts destinations. Greater Baltimore ranks 11th nationally and 9th among the 20 benchmarks in American Style Magazine's 2005 reader's poll. The region ranks 19th nationally, and 8th among the 20 benchmarks, in Cities Ranked & Rated 2004. Among the 20 benchmarks, Washington, D.C. is the top arts region in both rankings.

ARTS CULTURE RANKING 2004		
Rank	**Region**	**National Ranking**
1	Washington, DC	2
2	Boston	4
3	Minneapolis	7
4	Pittsburgh	9
5	Philadelphia	12
6	Denver	16
7	Cleveland	17
8	**Baltimore**	**19**
9	Dallas	23
10	Seattle	24
11	Atlanta	28
12	Richmond	31
13	Portland	35
14	St. Louis	39
15	Indianapolis	42
16	San Diego	48
17	Tampa	59
18	Austin	60
19	Raleigh	68
20	Charlotte	98

Source: Cities Ranked & Rated, 2004
MSAs based on 1993 OMB definitions.

ARTS DESTINATION 2005			
Rank	**City**	**National Rank (Cities of 500,000 or more)**	**National Rank (Cities of 100,000 to 500,000)**
1	Washington, DC	4	
2	Atlanta		6
2	Seattle	6	
4	Boston	7	
5	Austin	8	
6	Philadelphia	9	
7	Pittsburgh		10
7	San Diego	10	
9	**Baltimore**	**11**	
10	Charlotte	12	
11	Cleveland		13
11	Dallas	13	
13	Denver	14	
13	Minneapolis		14
15	Portland	15	
16	St. Louis		16
17	Tampa		20
18	Indianapolis	24	
	Raleigh		Not in top 25
	Richmond		Not in top 25

Source: American Style Magazine, 2005.

LEISURE RANKING
2004

Rank	Region	National Ranking
1	Seattle	6
2	Washington, DC	8
3	Boston	9
4	San Diego	13
5	Philadelphia	14
6	**Baltimore**	**20**
7	Minneapolis	21
8	Cleveland	26
9	Atlanta	28
10	Denver	29
11	Tampa	32
12	Dallas	35
13	St. Louis	40
14	Pittsburgh	46
15	Portland	57
16	Indianapolis	82
17	Charlotte	114
18	Richmond	150
19	Austin	164
20	Raleigh	184

Source: Cities Ranked & Rated, 2004s
MSAs based on 1993 OMB definitions.

Social Distress and Crime

Despite a significant drop in violent crime, Greater Baltimore continues to rank last among the 20 regions for violent crime rates in 2004, according to FBI Uniform Crime Reports. The safest metro areas are Raleigh, Minneapolis, Portland, Austin and Pittsburgh.

Greater Baltimore ranks 4th among the 20 benchmarks for drop in violent crime with an average annual decline of 4.5 percent between 2001 and 2004. Raleigh ranks 1st among the 20 benchmarks with a 12.9 percent decline. However, this is likely due to the new definition of that region. When the new Census MSA definitions were enacted, Raleigh and Durham were divided, and Durham is the part of that region that has historically had the highest violent crime rates.

Comparison of previous years is difficult for most metro areas because of the new MSA definitions. However, this comparison provides a good gauge, since most MSAs only added smaller, suburban counties with relatively lower crime rates. While Seattle and Pittsburgh realized significant increases in violent crime, their rates are still less than half that of the Baltimore region.

For property crime, Greater Baltimore ranks 10th among the 20 benchmarks with a property crime rate in 2004 that is just above the U.S. average. Boston and Pittsburgh have the lowest property crime rates among the 20 markets. Charlotte, Dallas and Seattle the highest.

Greater Baltimore ranks 3rdnd for property crime rate change with an average annual decline of -5.8 percent between 2001 and 2004. Raleigh also places first in property crime change, largely due to its split with Durham. San Diego and Indianapolis ranked at the bottom of the group with increases of over 3.8 percent.

POVERTY 2004		
Rank	**Region**	**% Families with Income Below Poverty Level**
1	Minneapolis	4.4%
2	Washington, DC	5.3%
3	Denver	5.7%
4	Raleigh	6.1%
5	Boston	6.2%
6	Seattle	6.3%
7	Indianapolis	6.5%
8	Austin	6.7%
8	Portland	6.7%
10	Atlanta	7.0%
11	**Baltimore**	**7.1%**
11	Charlotte	7.1%
11	Richmond	7.1%
14	St. Louis	7.8%
15	Philadelphia	8.0%
15	Pittsburgh	8.0%
17	Cleveland	8.1%
17	Dallas	8.1%
17	Tampa	8.1%
20	San Diego	9.1%

Source: Claritas

SUICIDE 2003		
Rank	**Region**	**Suicide Deaths Per 100,000 Population**
1	Boston (1)	6.7
2	Washington, DC (2)	7.3
3	Minneapolis	8.5
4	**Baltimore**	**9.3**
5	Philadelphia	9.4
6	Dallas (3)	9.4
7	Raleigh	10.1
8	Atlanta	10.3
9	Charlotte	10.7
10	Cleveland (4)	10.8
11	San Diego	11.1
12	Indianapolis	11.2
13	Richmond	11.5
14	Pittsburgh	11.7
15	Austin (3)	11.9
16	St. Louis	12.1
17	Seattle	12.4
18	Portland	14.6
19	Denver	14.8
20	Tampa	15.5

Sources: State Health Departments.
(1) NH counties are average of 1999-2001.
(2) DC data is for 2002; WV counties average of 1997-2001.
(3) Data is for 2002.
(4) Data is average of 2000-2002.

VIOLENT CRIME 2004		
2004 Rank	**Region**	**2004 Rate Per 100,000 Population**
1	Raleigh	330.5
2	Minneapolis	338.8
3	Portland	341.5
4	Austin	364.5
5	Pittsburgh	368.7
6	Seattle	399.2
7	Boston	400.4
8	Richmond	431.7
9	Denver	434.0
10	Washington, DC	446.5
	U.S.	465.5
11	San Diego	468.4
12	St. Louis	490.2
13	Atlanta	521.9
14	Indianapolis	533.3
15	Cleveland (1992)	551.4
16	Dallas	554.9
17	Philadelphia (2003)	609.4
18	Charlotte	763.3
19	Tampa	785.7
20	**Baltimore**	**886.1**

Source: Federal Bureau of Investigation.
Uniform Crime Reports.

VIOLENT CRIME CHANGE 2001 and 2004				
Rank	**Region**	**2004 Rate Per 100,000 Population**	**2001 Rate Per 100,000 Population**	**% Annual Average Change**
1	Raleigh (1)	330.5	497.7	-11.2%
2	Dallas (1)	554.9	697.3	-6.8%
3	Boston (2002 and 2004) (1)	400.4	452.7	-5.8%
4	**Baltimore**	**886.1**	**1,026.0**	**-4.5%**
5	Tampa	785.7	904.1	-4.4%
6	St. Louis (1992 and 2004) (1)	490.2	1,003.4	-4.3%
7	Portland (1)	341.5	389.6	-4.1%
8	Washington, DC (1)	446.5	508.9	-4.1%
9	Richmond (1)	431.7	483.7	-3.6%
10	Charlotte (1998 and 2004) (1)	763.3	946.7	-3.2%
11	Atlanta (1)	521.9	570.1	-2.8%
12	San Diego	468.4	509.1	-2.7%
	U.S.	465.5	504.5	-2.6%
13	Indianapolis (1999 and 2004) (1)	533.3	589.6	-1.9%
14	Philadelphia (2001 and 2003) (1)	609.4	617.8	-0.7%
15	Austin	364.5	364.4	0.0%
16	Minneapolis	338.8	332.0	0.7%
17	Seattle (1)	399.2	371.1	2.5%
18	Pittsburgh (1)	368.7	337.7	3.1%
19	Denver (1)	434.0	394.8	3.3%
	Cleveland	NA	NA	

Source: Federal Bureau of Investigation.
Uniform Crime Reports.
(1) Boundaries changed between reporting years.

PROPERTY CRIME 2004		
2004 Rank	**Region**	**2004 Rate Per 100,000 Population**
1	Boston	2,326.9
2	Pittsburgh	2,370.7
3	Philadelphia (2003)	2,836.6
4	Raleigh	2,980.9
5	San Diego	3,285.0
	Washington, DC (2003)	3,375.2
6	Minneapolis	3,384.9
7	U.S.	3,517.1
8	Richmond	3,608.9
9	St. Louis	3,639.0
10	**Baltimore**	**3,660.4**
11	Cleveland (1992)	3,778.7
12	Indianapolis	4,090.1
13	Austin	4,210.5
14	Atlanta	4,224.8
15	Denver	4,288.0
16	Tampa	4,562.9
17	Portland	4,869.8
18	Dallas	4,953.9
19	Seattle	5,094.6
20	Charlotte	5,396.3

Source: Federal Bureau of Investigation.
Uniform Crime Reports.

PROPERTY CRIME CHANGE 2001 and 2004				
Rank	**Region**	**2004 Rate Per 100,000 Population**	**2001 Rate Per 100,000 Population**	**% Annual Average Change**
1	Raleigh (1)	2,980.9	4,660.8	-12.0%
2	Richmond (2002 and 2004) (1)	3,608.9	4,244.9	-7.5%
3	**Baltimore**	**3,660.4**	**4,438.7**	**-5.8%**
4	Philadelphia (2001 and 2003) (1)	2,836.6	3,120.9	-4.6%
5	Minneapolis	3,384.9	3,761.6	-3.3%
6	Tampa	4,562.9	5,004.6	-2.9%
7	Boston (1)	2,326.9	2,546.8	-2.9%
8	St. Louis (1992 and 2004) (1)	3,639.0	4,904.6	-2.2%
9	Austin	4,210.5	4,478.1	-2.0%
	U.S.	3,517.1	3,658.1	-1.3%
10	Dallas (1)	4,953.9	5,128.1	-1.1%
11	Washington, DC (2001 and 2003) (1)	3,375.2	3,443.1	-1.0%
12	Charlotte (1998 and 2004) (1)	5,396.3	5683.6	-0.8%
13	Portland (1)	4,869.8	4,967.7	-0.7%
14	Pittsburgh (1)	2,370.7	2,413.7	-0.6%
15	Atlanta (1)	4,224.8	4,255.6	-0.2%
16	Denver (1)	4,288.0	4,297.7	-0.1%
17	Seattle (1)	5,094.6	4,906.3	1.3%
18	San Diego	3,285.0	3,051.7	2.5%
19	Indianapolis (1999 and 2004) (1)	4,090.1	3,421.0	3.9%
	Cleveland	NA	NA	

Source: Federal Bureau of Investigation.
Uniform Crime Reports.
(1) Boundaries changed between reporting years.

Air Quality and Climate

While Greater Baltimore ranks 19th among the 20 regions for air quality, the region ranks 3rd for most improvement based on an EPA Air Quality Index. San Diego has the worst air quality among the 20 markets, but ranks first for change. Dallas, Boston, Minneapolis and Seattle have the cleanest air. Pittsburgh, Cleveland and Seattle realized the greatest declines in air quality.

AIR QUALITY
1990-2003

Rank	Region	Average # of Days with AQI Values Greater than 100 at Trend Sites (1990-2003)
1	Dallas	0.2
2	Boston	1.4
3	Minneapolis	1.7
4	Seattle	2.5
5	Austin	3.6
6	Denver	3.9
7	Tampa	4.1
8	Portland	4.5
9	Raleigh	9.4
10	Richmond	13.4
11	Indianapolis	14.4
12	Charlotte	20.1
13	Cleveland	20.2
14	St. Louis	22.2
15	Pittsburgh	28.1
16	Atlanta	28.1
17	Washington, DC	28.6
18	Philadelphia	32.4
19	**Baltimore**	**35.2**
20	San Diego	42.3

Source: U.S. Environmental Protection Agency.
MSAs are based on 1993 OMB definitions.

CHANGE IN AIR QUALITY 1990-1999 and 2000-2003				
Rank	**Region**	**Average # of Days with AQI Values Greater than 100 at Trend Sites (1990-1999)**	**Average # of Days with AQI Values Greater than 100 at Trend Sites (2000-2003)**	**Change in Average # of Days**
1	San Diego	49.1	25.3	-23.9
2	Atlanta	30.9	21.3	-9.7
3	**Baltimore**	**37.5**	**29.5**	**-8.0**
4	Washington, DC	30.8	23.0	-7.8
5	Philadelphia	34.2	27.8	-6.5
6	Charlotte	21.4	16.8	-4.7
7	Richmond	13.9	12.0	-1.9
8	Tampa	4.4	3.5	-0.9
9	Raleigh	9.6	8.8	-0.9
10	St. Louis	22.4	21.8	-0.6
11	Austin	3.7	3.5	-0.2
12	Indianapolis	14.4	14.3	-0.2
13	Portland	4.5	4.5	0.0
14	Dallas	0	0.8	0.8
15	Denver	3.6	4.5	0.9
16	Minneapolis	1.2	3.0	1.8
17	Boston	0.3	4.0	3.7
18	Seattle	1.2	5.8	4.6
19	Cleveland	18.6	24.3	5.7
20	Pittsburgh	21.9	43.5	21.6

Source: U.S. Environmental Protection Agency.
MSAs are based on 1993 OMB definitions.

AVERAGE DAILY TEMPERATURE		
Rank	**Region**	**Degrees F.**
1	Tampa	73.1
2	Austin*	68.5
3	Dallas	65.5
4	San Diego	64.4
5	Atlanta	62.1
6	Charlotte	61.4
7	Greenville-Spartanburg	60.0
8	Raleigh-Durham	59.6
9	Richmond	57.6
10	***Washington, DC Reagan***	57.5
11	St. Louis	56.3
12	Philadelphia	55.3
13	**Baltimore**	54.6
14	***Washington, DC Dulles***	54.2
15	Portland-Vancouver	53.5
16	Indianapolis	52.5
17	Seattle	52.3
18	Boston	51.6
19	Denver	50.1
20	Cleveland	49.6
21	Minneapolis-St. Paul	45.4

Based on airport data except where *.
Source: Southern Regional Climate Center, 1971-2000
http://www.srcc.lsu.edu/7100/tavg/USMap.html

SUNSHINE		
Rank	**Region**	**Percent Possible Sunshine**
1	Denver	69%
2	San Diego	68%
3	Tampa	66%
4	Richmond	63%
5	Charlotte	62%
6	Dallas	61%
7	Atlanta	60%
7	Austin	60%
7	Greenville-Spartanburg	60%
10	Boston	58%
10	Minneapolis-St. Paul	58%
10	Raleigh--Durham	58%
13	**Baltimore**	**57%**
13	St. Louis	57%
15	Philadelphia	56%
15	Washington, DC	56%
17	Indianapolis	55%
18	Cleveland	49%
19	Portland-Vancouver	48%
21	Seattle	47%

Source: Northeast Regional Climate Center, through 1998
http://www.nrcc.cornell.edu/ccd/pctpos98.html

AVERAGE ANNUAL PRECIPITATION		
Rank	**Region**	**Inches**
1	Greenville	50.24
2	Atlanta	50.20
3	Tampa	44.77
4	Richmond	43.91
5	Charlotte	43.51
6	Raleigh--Durham	43.05
7	Boston	42.53
8	Philadelphia	42.05
9	**Baltimore**	41.94
10	***Washington, DC Dulles***	41.80
11	Indianapolis	40.95
12	***Washington, DC Reagan***	39.35
13	St. Louis	38.75
14	Cleveland	38.71
15	Portland-Vancouver	37.07
16	Seattle	37.07
17	Dallas	37.05
18	Austin*	33.65
19	Minneapolis	29.41
20	Denver	15.81
21	San Diego	10.77

Based on airport data except where *.
Source: Southern Regional Climate Center, 1971-2000
http://www.srcc.lsu.edu/7100/prcp/USMap.html

GOVERNMENT AND COMMUNITY

The Greater Baltimore region ranks 2nd for the least number of local government units per 100,000 population and for total number of local government units in the region.

The Baltimore region ranks 1st among the benchmark regions for median total contributions received by the region's charities, according to data from Charity Navigator compiled in summer 2005. This ranking is different from previously-used United Way rankings in that it measures actual giving based on a study of tax returns, as opposed to giving to just one agency.

LOCAL GOVERNMENT UNITS 2002		
Rank	**Region**	**Total County and Subcounty Governments**
1	San Diego	19
2	**Baltimore**	**26**
3	Raleigh	30
3	Richmond	30
5	Tampa	39
6	Austin	49
7	Denver	52
8	Charlotte	60
9	Portland	65
10	Seattle	81
11	Washington, DC	109
12	Atlanta	161
13	Cleveland	167
14	Indianapolis	187
15	Boston	201
16	Dallas	211
17	Minneapolis	342
18	Philadelphia	385
19	St. Louis	395
20	Pittsburgh	464

Source: Bureau of the Census.
Census of Governments, 2002.

LOCAL GOVERNMENT UNITS PER 100,000 POPULATION 2002		
Rank	**Region**	**Units Per 100,000 Population**
1	San Diego	0.6
2	**Baltimore**	**1.0**
3	Tampa	1.5
4	Washington, DC	2.1
5	Denver	2.2
6	Seattle	2.6
6	Richmond	2.6
8	Portland	3.1
9	Raleigh	3.3
10	Atlanta	3.4
11	Austin	3.5
12	Dallas	3.7
13	Charlotte	4.1
14	Boston	4.5
15	Philadelphia	6.6
16	Cleveland	7.8
17	Minneapolis	11.0
18	Indianapolis	11.5
19	St. Louis	14.3
20	Pittsburgh	19.3

Source: Bureau of the Census.
Census of Governments, 2002.

CONTRIBUTIONS TO CHARITIES
2005

Rank	Region	National Rank	Median Total Contributions to Charities
1	**Baltimore**	**1**	**$7,300,974**
2	Denver	4	$6,091,039
3	Pittsburgh	5	$5,970,197
4	St. Louis	8	$5,521,700
5	Atlanta	12	$4,779,341
6	Indianapolis	14	$4,356,215
7	San Diego	15	$4,314,016
8	Cleveland	16	$4,275,298
9	Boston	17	$4,269,216
10	Minneapolis	18	$4,132,569
	U.S.		$3,677,001
11	Seattle	20	$3,654,586
12	Dallas	22	$3,414,513
13	Philadelphia	23	$3,359,999
14	Washington, DC	24	$3,310,913
	Austin	NA	NA
	Charlotte	NA	NA
	Portland	NA	NA
	Raleigh	NA	NA
	Richmond	NA	NA
	Tampa	NA	NA

Source: Charity Navigator, www.charitynavigator.org

FINANCIAL PRACTICES OF CHARITIES 2005			
Rank	**Region**	**National Rank**	**Overall Score**
1	San Diego	1	56.68
2	Minneapolis	2	55.87
3	Denver	4	54.88
4	Pittsburgh	5	54.63
5	St. Louis	10	53.89
6	Cleveland	12	53.64
7	Atlanta	13	53.44
8	Philadelphia	14	52.82
	U.S.		52.59
9	Washington, DC	18	51.67
10	Boston	19	50.33
11	Seattle	20	49.74
12	Indianapolis	23	48.34
13	**Baltimore**	**24**	**47.12**
14	Dallas	25	46.98
	Austin	NA	NA
	Charlotte	NA	NA
	Portland	NA	NA
	Raleigh	NA	NA
	Richmond	NA	NA
	Tampa	NA	NA

Source: Charity Navigator