Hampton Roads Regional Benchmarking Study

HAMPTON ROADS
PLANNING DISTRICT COMMISSION

December 2010

E10-02

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Regional Benchmarking Study

Preparation of this report was included in the HRPDC Unified Planning Work Program for Fiscal Year 2010-2011, approved by the Hampton Roads Planning District Commission at its Executive Committee Meeting of June 16, 2010.

Prepared by the staff of the
Hampton Roads Planning District Commission

December 2010

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ABSTRACT

The Hampton Roads Regional Benchmarking Study is an annual publication designed to evaluate regional progress across a broad range of categories. The publication includes a locality profile for each of the region's 16 jurisdictions as well as graphical illustrations for 83 regional benchmarks covering the economy, demographics, housing, transportation, and various quality of life indicators. Each graph is accompanied by a brief explanation regarding the purpose of the benchmark and the current condition in Hampton Roads. Complete data tables for each of the data sets are included in the appendix.

ACKNOWLEDGMENTS

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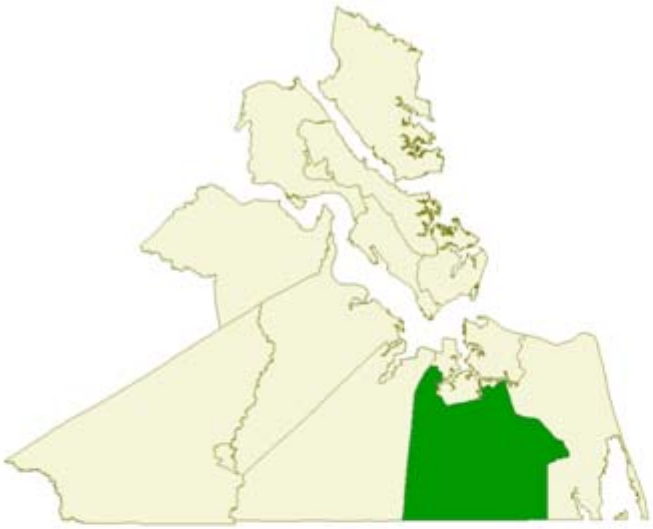
INTRODUCTION

Three words can be used to describe the Hampton Roads economy: intricate, vibrant, and unique. The local economy is influenced by a seemingly infinite number of variables that are constantly pushing and pulling in every direction. The diverse grouping of market pressures can make it difficult to understand how changes to the economic environment might impact on Hampton Roads. Unfortunately there is no crystal ball that would allow one to peer inside the economy. However, information is available enabling one to be more informed during the decision making process. The goal of this benchmarking study is to inform the leadership on trends and conditions in Hampton Roads. This report has been designed to capitalize on available information by collecting timely, relevant, and reliable data and presenting it in a simple and convenient manner.

The first step toward achieving this goal was to develop a list of guidelines for selecting appropriate indicators. Information age technologies have resulted in the ability to collect and publish an ever-increasing number of statistics. Of course not all data sources can be considered valid or legitimate. Data used throughout this report has been screened for accuracy and consistency, ensuring that it came from a reliable source, and was comparable from year to year.

Indicators that are included in this benchmarking report fit under five general categories. The first and largest category is the economy. This section includes employment, income, and industry benchmarks. The second section focuses on demographics in the region. The third section reviews the housing industry in Hampton Roads. The fourth section outlines the state of regional transportation. The final section contains a myriad of miscellaneous quality of life indicators. By combining all five sections we hope to provide a comprehensive view of the socio-economic climate in Hampton Roads and how that climate has changed in recent years is provided

The format of this report includes both current and historical statistics. Graphs that depict a single point in time provide a snapshot of current or recent conditions. By contrast, dynamic statistics are employed to evaluate data over time, exhibiting recent trends or patterns. In order to emphasize certain cycles (as opposed to trends), some graphics do not have a zero-origin axis. This introduction concludes by providing basic information on the sixteen jurisdictions that comprise Hampton Roads.



Chesapeake

City Council:

Dr. Alan Krasnoff, Mayor
Dr. John deTriquet, Vice Mayor
Mr. Lonnie Craig
Ms. Susan H. Kelly
Mr. Clifton Hayes Jr.
Mr. Scott W. Matheson
Ms. Debbie Ritter
Dr. Ella Ward
Mr. Richard West

Population - 2009	219,960
Land Area - 2009	340 Square Miles
Population Density - 2009	647 Persons Per Square Mile
Total Employment - 2008	125,697
Labor Force - 2009	116,866
Unemployment Rate - 2009	6.3%
Per Capita Income - 2008	$39,988
Total Personal Income - 2008	$8,810,046,000
Taxable Retail Sales - 2009	$2,897,360,063
Fair Market Value of Real Estate - 2008	$24,594,427,236

Official Website . . . . . http://www.chesapeake.va.us/

Franklin

City Council:

Mr. James Councill III, Mayor
Ms. Raystine Johnson, Vice Mayor
Mr. Donald Blythe
Mr. Brenton Burgess
Mr. Barry Cheatham
Mrs. Mary Hilliard
Mr. Greg McLemore

Population - 2009	8,362
Land Area - 2009	8 Square Miles
Population Density - 2009	1045 Persons Per Square Mile
Total Employment - 2008	6,391
Labor Force - 2009	3,954
Unemployment Rate - 2009	10.2%
Per Capita Income - 2008	$31,035
Total Personal Income - 2008	$263,654,810
Taxable Retail Sales - 2009	$149,254,304
Fair Market Value of Real Estate - 2008	$673,049,100

Official Website . . . . . http://www.franklinva.com/

Gloucester

Board of Supervisors:

Ms. Louise Theberge, Chair
Mr. Christian Rilee, Vice-Chair
Mr. Carter Borden
Ms. Robert Crewe
Mr. John Northstein
Ms. Michelle Ressler
Mr. Gregory Woodard

Population - 2009	36,647
Land Area - 2009	225 Square Miles
Population Density - 2009	163 Persons Per Square Mile
Total Employment - 2008	15,260
Labor Force - 2009	21,116
Unemployment Rate - 2009	5.9%
Per Capita Income - 2008	$35,255
Total Personal Income - 2008	$1,364,129,000
Taxable Retail Sales - 2009	$333,790,286
Fair Market Value of Real Estate - 2008	$4,019,518,900

Official Website . . . . . http://www.gloucesterva.info/

Hampton

City Council:

Ms. Molly Ward, Mayor
Mr. George E. Wallace, Vice Mayor
Mr. Ross Kearney II
Ms. Angela Leary
Mr. Will Moffett
Mr. Christopher Stuart
Mr. Donnie Tuck

Population - 2009	144,749
Land Area - 2009	52 Square Miles
Population Density - 2009	2783 Persons Per Square Mile
Total Employment - 2008	81,410
Labor Force - 2009	69,807
Unemployment Rate - 2009	7.7%
Per Capita Income - 2008	$35,903
Total Personal Income - 2008	$5,215,071,000
Taxable Retail Sales - 2009	$1,192,612,862
Fair Market Value of Real Estate - 2008	$11,676,924,000

Official Website . . . . . http://www.hampton.gov/

Isle of Wight

Board of Supervisors:
Mr. Thomas J. Wright III, Chair
Vice-Chair (Vacant)
Mr. Kenneth Bunch
Mr. Al Casteen
Mr. Stan Clark
Ms. JoAnn Hall

Population - 2009	34,977
Land Area - 2009	316 Square Miles
Population Density - 2009	111 Persons Per Square Mile
Total Employment - 2008	17,118
Labor Force - 2009	19,148
Unemployment Rate - 2009	6.2%
Per Capita Income - 2008	$38,495
Total Personal Income - 2008	$1,368,597,000
Taxable Retail Sales - 2009	$200,079,929
Fair Market Value of Real Estate - 2008	$4,791,549,100

Official Website . . . . . http://www.co.isle-of-wight.va.us/

James City County

Board of Supervisors:

Mr. James Kennedy, Chair
Ms. Mary Jones, Vice-Chair
Mr. Bruce Goodson
Mr. James Icenhour Jr.
Mr. John McGlennon

Population - 2009	63,696
Land Area - 2009	153 Square Miles
Population Density - 2009	416 Persons Per Square Mile
Total Employment - 2008	39,155
Labor Force - 2009	32,373
Unemployment Rate - 2009	5.3%
Per Capita Income - 2008	$51,244
Total Personal Income - 2008	$3,161,740,009
Taxable Retail Sales - 2009	$787,049,384
Fair Market Value of Real Estate - 2008	$11,131,104,700

Official Website . . . . . http://www.jccegov.com/

Newport News

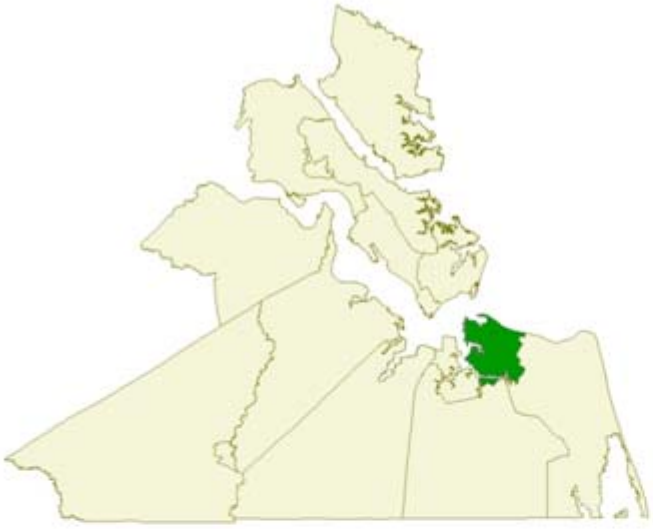
City Council:

Dr. McKinley Price, Mayor
Ms. Madeline McMillan , Vice Mayor
Mr. Herbert Bateman Jr.
Ms. Sharon Scott
Ms. Tina Vick
Mr. Joseph Whitaker
Dr. Patricia Woodbury

Population - 2009	193,172**
Land Area - 2009	70 Square Miles
Population Density - 2009	2760 Persons Per Square Mile
Total Employment - 2008	119,127
Labor Force - 2009	90,087
Unemployment Rate - 2009	7.6%
Per Capita Income - 2008	$30,752
Total Personal Income - 2008	$5,941,588,000
Taxable Retail Sales - 2009	$1,933,222,912
Fair Market Value of Real Estate - 2008	$15,274,403,420

**Census Estimates for Newport News

Official Website . . . . . www.nngov.com



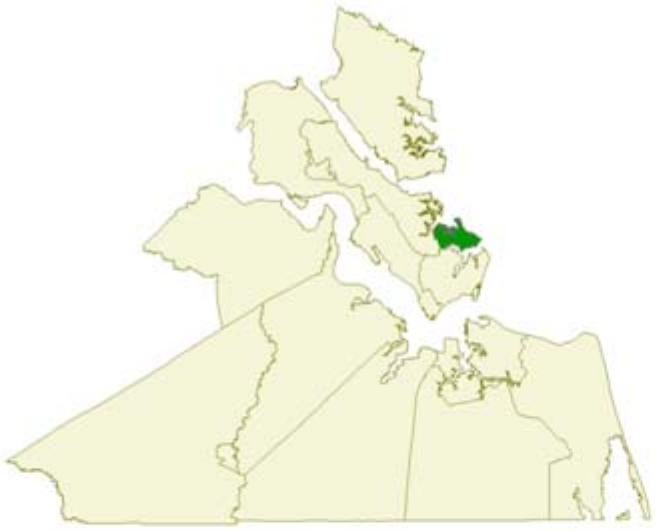
Norfolk

City Council:

Mr. Paul Fraim, Mayor
Mr. Anthony Burfoot, Vice Mayor
Mr. Andrew Protogyrou
Mr. Paul Riddick
Mr. Thomas Smigiel
Dr. Theresa Whibley
Mr. Donald Williams
Mr. Barclay Winn

Population - 2009	237,764
Land Area - 2009	54 Square Miles
Population Density - 2009	4403 Persons Per Square Mile
Total Employment - 2008	223,550
Labor Force - 2009	101,847
Unemployment Rate - 2009	8.4%
Per Capita Income - 2008	$36,065
Total Personal Income - 2008	$8,462,734,000
Taxable Retail Sales - 2009	$2,597,753,733
Fair Market Value of Real Estate - 2008	$18,583,731,469

Official Website . . . . . http://www.norfolk.gov/



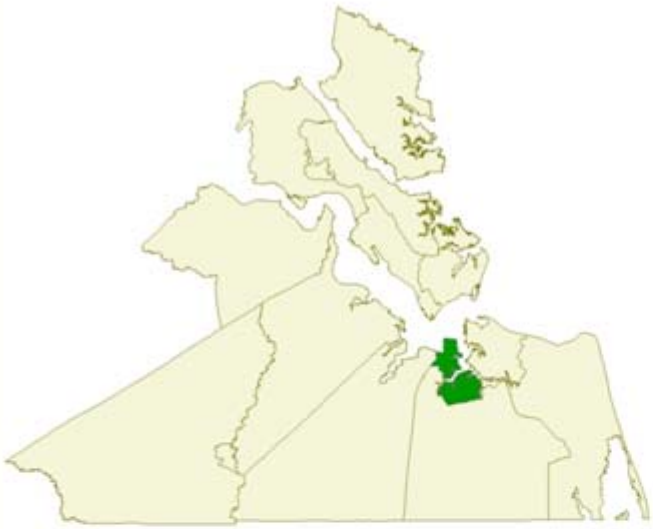
Poquoson

City Council:

Mr. Gordon C. Helsel, Jr., Mayor
Mr. W. Eugene Hunt Jr., Vice Mayor
Ms. Traci-Dale Crawford
Mr. Carey Freeman
Mr. Frank Kreiger
Mr. E. Thomas Meree
Mr. Charles Southall III

Population - 2009	11,881
Land Area - 2009	16 Square Miles
Population Density - 2009	743 Persons Per Square Mile
Total Employment - 2008	3,300
Labor Force - 2009	6,391
Unemployment Rate - 2009	5.1%
Per Capita Income - 2008	$54,458
Total Personal Income - 2008	$608,376,997
Taxable Retail Sales - 2009	$43,129,623
Fair Market Value of Real Estate - 2008	$1,685,314,440

Official Website . . . . . http://www.poquoson-va.gov



Portsmouth

City Council:

Mr. Kenneth Wright, Mayor
Mr. Charles Whitehurst Sr., Vice Mayor
Mr. Paige Cherry
Dr. Curtis Edmonds, Sr.
Mr. Stephen Heretick
Mr. William Moody
Ms. Marlene Randall

Population - 2009	98,124
Land Area - 2009	33 Square Miles
Population Density - 2009	2973 Persons Per Square Mile
Total Employment - 2008	57,760
Labor Force - 2009	46,999
Unemployment Rate - 2009	8.3%
Per Capita Income - 2008	$34,102
Total Personal Income - 2008	$3,394,538,000
Taxable Retail Sales - 2009	$626,320,512
Fair Market Value of Real Estate - 2008	$7,422,683,650

Official Website . . . . . http://www.portsmouthva.gov/

Southampton

Board of Supervisors:

Mr. Dallas Jones , Chair
Mr. Walter Young Jr., Vice-Chair
Mr. Walter Brown III
Mr. Carl Faison
Ms. Anita Felts
Mr. Ronald West
Mr. Moses Wyche

Population - 2009	18,620
Land Area - 2009	600 Square Miles
Population Density - 2009	31 Persons Per Square Mile
Total Employment - 2008	6,302
Labor Force - 2009	8,054
Unemployment Rate - 2009	8.1%
Per Capita Income - 2008	$29,714
Total Personal Income - 2008	$562,077,190
Taxable Retail Sales - 2009	$42,834,335
Fair Market Value of Real Estate - 2008	$1,579,246,600

Official Website . . . . . http://www.southamptoncounty.org/

Suffolk

City Council:

Ms. Linda Johnson, Mayor
Mr. Curtis Milteer Sr., Vice Mayor
Mr. Robert C. Barclary IV
Mr. Joseph Barlow
Mr. Leroy Bennett
Mr. Charles Brown
Mr. Jeffrey Gardy
Mr. Charles Parr Sr.

Population - 2009	83,006
Land Area - 2009	400 Square Miles
Population Density - 2009	208 Persons Per Square Mile
Total Employment - 2008	34,303
Labor Force - 2009	41,009
Unemployment Rate - 2009	6.6%
Per Capita Income - 2008	$36,157
Total Personal Income - 2008	$2,980,023,000
Taxable Retail Sales - 2009	$632,874,977
Fair Market Value of Real Estate - 2008	$9,723,630,800

Official Website . . . . . http://www.suffolk.va.us/

Surry

Board of Supervisors:

Mr. Reginald Harrison, Chair
Mr. John Seward, Vice-Chair
Mr. Ernest Blount
Mr. M Sherlock Holmes
Ms. Judy Lyttle

Population - 2009	7,164
Land Area - 2009	279 Square Miles
Population Density - 2009	26 Persons Per Square Mile
Total Employment - 2008	2,990
Labor Force - 2009	3,843
Unemployment Rate - 2009	7.4%
Per Capita Income - 2008	$31,430
Total Personal Income - 2008	$223,024,000
Taxable Retail Sales - 2009	$33,281,244
Fair Market Value of Real Estate - 2008	$846,230,500

Official Website . . . . . http://www.surrycountyva.gov/

Virginia Beach

City Council:

Mr. William D. Sessoms, Mayor
Mr. Louis Jones , Vice Mayor
Ms. Rita Sweet Bellitto
Ms. Glenn R. Davis
Mr. Bill DeSteph
Mr. Harry Diezel
Mr. Robert Dyer
Ms. Barbara Henley
Mr. John Uhrin
Ms. Rosemary Wilson
Mr. James Wood

Population - 2009	434,412
Land Area - 2009	248 Square Miles
Population Density - 2009	1752 Persons Per Square Mile
Total Employment - 2008	254,780
Labor Force - 2009	226,003
Unemployment Rate - 2009	5.9%
Per Capita Income - 2008	$45,022
Total Personal Income - 2008	$19,459,762,000
Taxable Retail Sales - 2009	$4,638,871,814
Fair Market Value of Real Estate - 2008	$57,138,330,304

Official Website . . . . . http://www.vbgov.com

Williamsburg

City Council:

Dr. Clyde Haulman, Mayor
Mr. Paul Freiling, Vice Mayor
Mr. Scott Foster
Ms. Judy Knudson
Mr. Douglas Pons

Population - 2009	13,572
Land Area - 2009	9 Square Miles
Population Density - 2009	1508 Persons Per Square Mile
Total Employment - 2008	21,677
Labor Force - 2009	5,588
Unemployment Rate - 2009	14.8%
Per Capita Income - 2008	$41,428
Total Personal Income - 2008	$544,647,991
Taxable Retail Sales - 2009	$321,601,815
Fair Market Value of Real Estate - 2008	$1,851,350,800

Official Website . . . . . http://www.williamsburgva.gov/

York County

Board of Supervisors:
Mr. Donald Wiggins, Chair
Mr. George Hrichak, Vice-Chair
Ms. Sheila Noll
Mr. Thomas Shepperd Jr.
Mr. Walter Zaremba

Population - 2009	65,964
Land Area - 2009	106 Square Miles
Population Density - 2009	622 Persons Per Square Mile
Total Employment - 2008	35,721
Labor Force - 2009	31,237
Unemployment Rate - 2009	5.3%
Per Capita Income - 2008	$45,472
Total Personal Income - 2008	$2,820,389,003
Taxable Retail Sales - 2009	$897,426,613
Fair Market Value of Real Estate - 2008	$8,890,823,207

Official Website . . . . . http://www.yorkcounty.gov/

American Community Survey Data for Hampton Roads

Uses American Community Survey One Year Estimates 2009
Ranking is from largest value to smallest

Category*	Hampton Roads Value	Hampton Roads Rank**	Average MSA Value
Median Age	34.7	**77**	36.5
% of Population 65 & Older	11.6%	**58**	12.6%
% of Population Who Are African American	31.2%	**8**	12.7%
% of Population Who Are White Non-Hispanic	58.4%	**70**	63.8%
% of Population Who Are Foreign Born	5.8%	**72**	13.2%
% of Population Who Moved in Past Year	17.9%	**15**	15.1%
Mean Travel Time to Work (Mins)	23.2	**59**	25.3
% Who Traveled to Work by Public Transit	1.4%	**62**	5.3%
% Who Worked Outside County of Residence	48.6%	**4**	27.0%
% of Households With Children in Residence	35.2%	**31**	33.7%
Average Household Size	2.59	**48**	2.64
Ratio of Unmarried Men to Unmarried Women	115.5	**27**	112.1
Birthrate per 1000 women (15 & 50 Years Old)	59	**38**	57
% of People Who Completed High School	89.4%	**22**	85.5%
% of People Who Have a Bachelor's Degree	27.2%	**67**	28.8%
% of People Who Have an Advanced Degree	10.0%	**57**	10.7%
% of Who Don't Speak English at Home	7.9%	**79**	20.9%
% of People in Poverty	10.3%	**84**	14.1%
% of Children Under 18 Years in Poverty	15.8%	**75**	19.7%
% of People With a Disability	10.5%	**71**	11.6%
% of the Civilian Population Who Are Veterans	17.2%	**2**	9.3%
% Labor Force Participation (16-64 Years Old)	78.2%	**20**	75.4%
Employment/Population (16-64 Years Old)	65.4%	**75**	67.2%
% Who Moved Since 2005	44.3%	**39**	41.1%
Median Monthly Costs for Home Owners	1679	**29**	1547
% of Housing Units that are Owner-Occupied	63.2%	**81**	65.3%
% Owners Spending >30% Income on Housing	42.1%	**26**	37.8%
% Renters Spending >30% Income on Housing	48.7%	**42**	48.2%
% without Health Insurance Coverage	11.7%	**69**	15.1%
% of Children without Health Insurance	5.8%	**57**	8.5%

**For full descriptions of each category, see appendix page* *112*
***Rank is for Top 100 MSAs by Population*

SECTION I

This section on the Hampton Roads economy includes graphics and analysis evaluating the region's performance with regards to gross product, employment, labor force, and income.

Economy

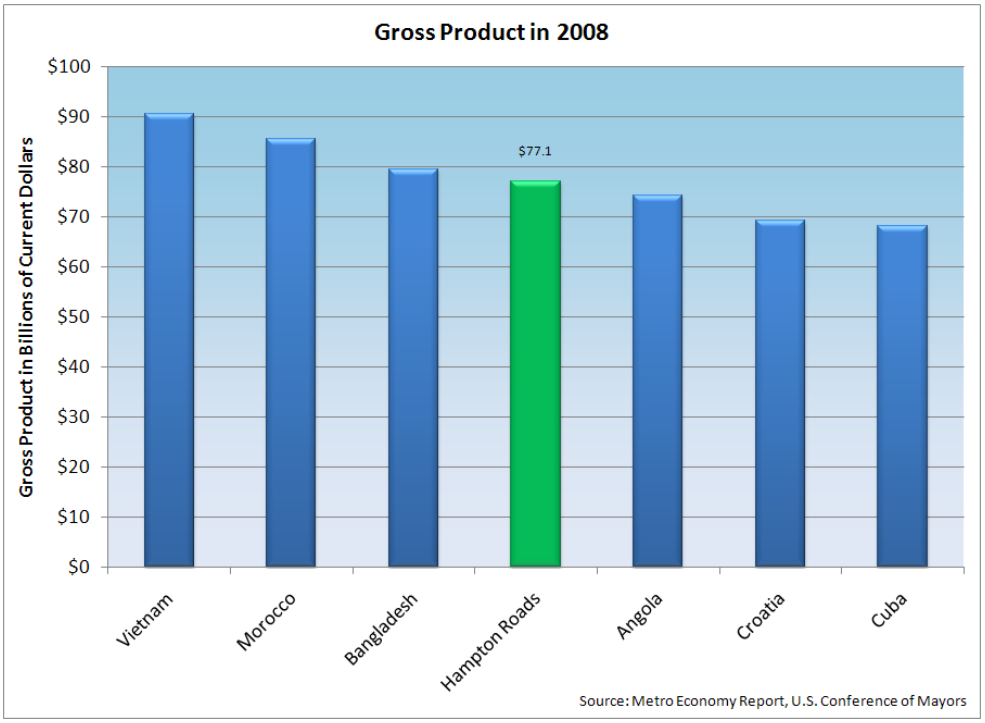
The size of the Hampton Roads Economy is impressive, with a gross product equivalent to that of most medium sized countries. While the Hampton Roads MSA still has the 39th largest gross regional product (also known as gross metro product) in the USA, last year the region experienced its first decline in gross regional product since 1991. This followed a long period of strong and steady growth, but the economic difficulties have begun to affect all aspects of the regional economy.

Employment and gross product tend to move together. This past recession caused a significant pull back in regional employment, and year over year employment growth began increasing after two and a half years of decline in the second half of 2010. Hampton Roads has yet to catch up to the recent employment growth of competitor MSAs, despite weathering this recession better than most areas outside of Washington and San Antonio. While manufacturing employment has been declining in the region since 2005, the region's service sectors' decline of 2.6% in 2009 actually cost the region more jobs than three years of falling manufacturing employment. The only industries that have been adding jobs in the region over the past 3 years are either one of the levels of government or industries that receive a large portion of their funding from the government (health care and education).

The unemployment rate in the region remains elevated at 7.3% on a seasonally adjusted basis, significantly higher than the 4.5% average unemployment rate that persisted over the past two decades. This level of unemployment will have a long-term effect on the regional economy, and the role that it plays in employment to population ratios will require examination in the near future.

One area that has been a source of strength for Hampton Roads is regional income, which relates to the high paying federal jobs in the region that continued to receive pay increases throughout the recession. We do not expect this trend to continue as there is increased attention being paid to federal spending. In 2009, the regional per capita income exceeded that of the nation for the first time on record, but it also marks the first year that real family incomes declined.

FIGURE 1.1 GROSS PRODUCT IN HAMPTON ROADS COMPARED TO FOREIGN ECONOMIES OF SIMILAR SIZE



Why is it important:
A comparison of the Hampton Roads economy relative to foreign economies of a similar size provides perspective as to the magnitude and potential influence of the regional market.

How are we doing:
The Hampton Roads economy ranks as the 39th largest metro economy in the United States. On an international scale, the economy is comparable to countries such as Angola and Bangladesh.

FIGURE 1.2 GROSS METRO PRODUCT IN HAMPTON ROADS AND COMPETING METROPOLITAN AREAS

Why is it important:
It is important to understand the relative size of metro economies when making direct comparisons. This graphic illustrates the broad range in the size of Hampton Roads' competing metropolitan areas.

How are we doing:
Hampton Roads' gross metro product is comparable to Tampa, Orlando, Richmond, and Jacksonville.

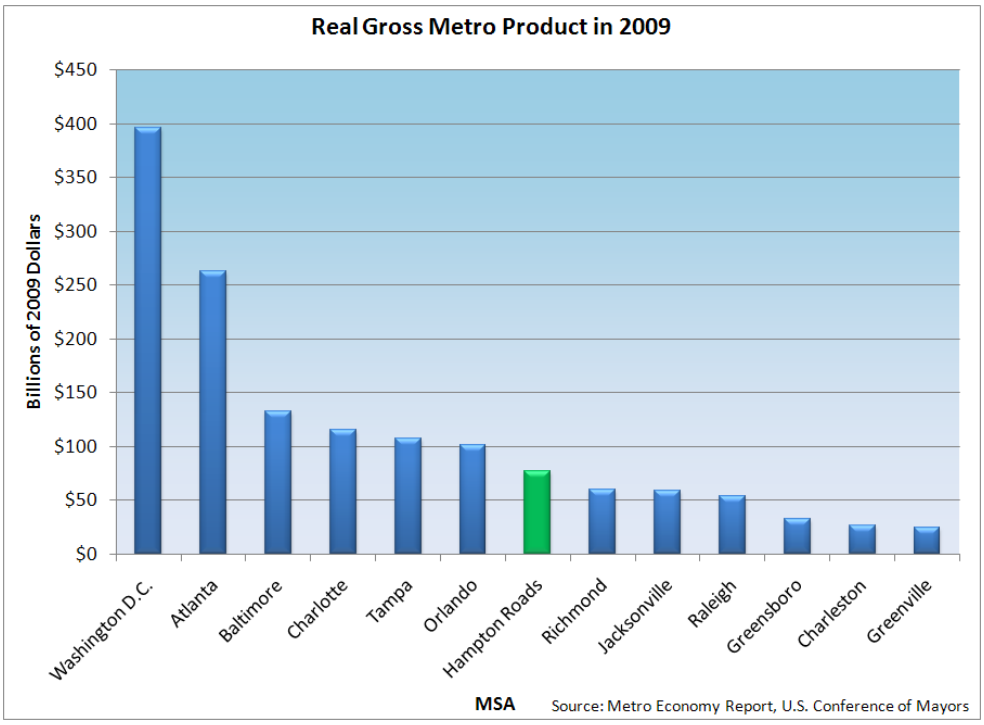
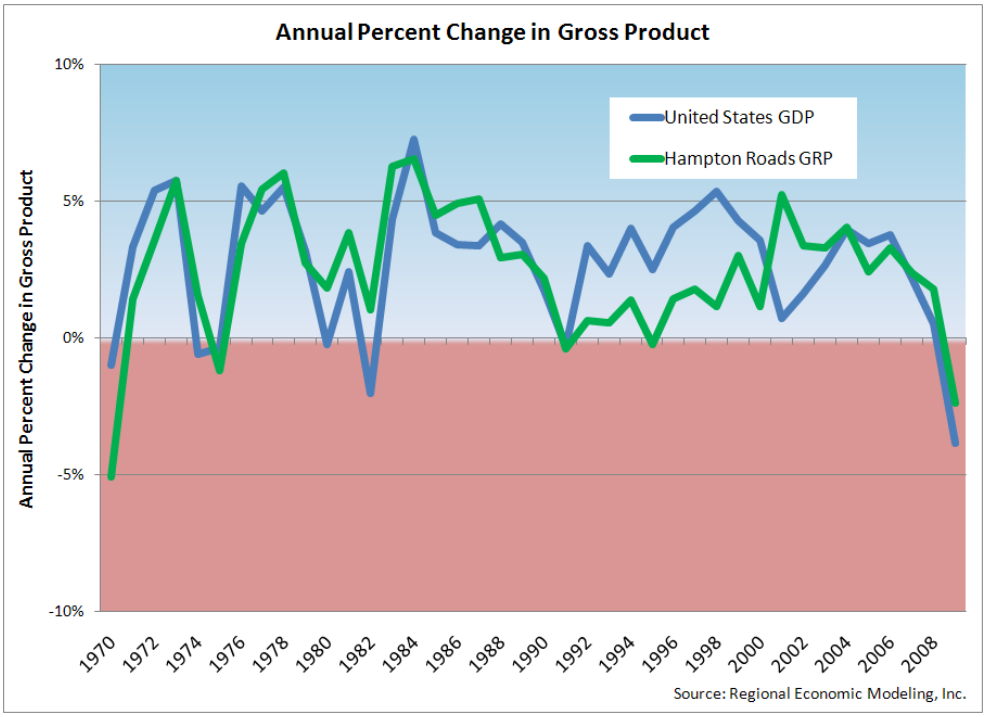


FIGURE 1.3 NATIONAL AND REGIONAL GROSS PRODUCT



Why is it important:
There are a multitude of variables that influence the direction of an economy. Comparing the gross regional product (GRP) to the national GDP provides perspective from which to view the local economy.

How are we doing:
The Gross Regional Product declined in Hampton Roads for the first time since 1991, but as consistent with regional trends, the economy did not experience the business cycle to the same extent as the nation.

FIGURE 1.4 GROSS REGIONAL PRODUCT COMPARISON FOR HAMPTON ROADS AND COMPETING METROPOLITAN AREAS FROM 2005 TO 2009

Why is it important:
Competing statistical areas are subject to many of the same pressures that influence economic conditions in HR. Benchmarking local economic growth against growth in competing metros allows one to assess a region's performance irrespective of market conditions.

How are we doing:
Over the past four years the performance of Hampton Roads' economy has been below average. Slow population growth has somewhat limited the impact of increased defense spending.

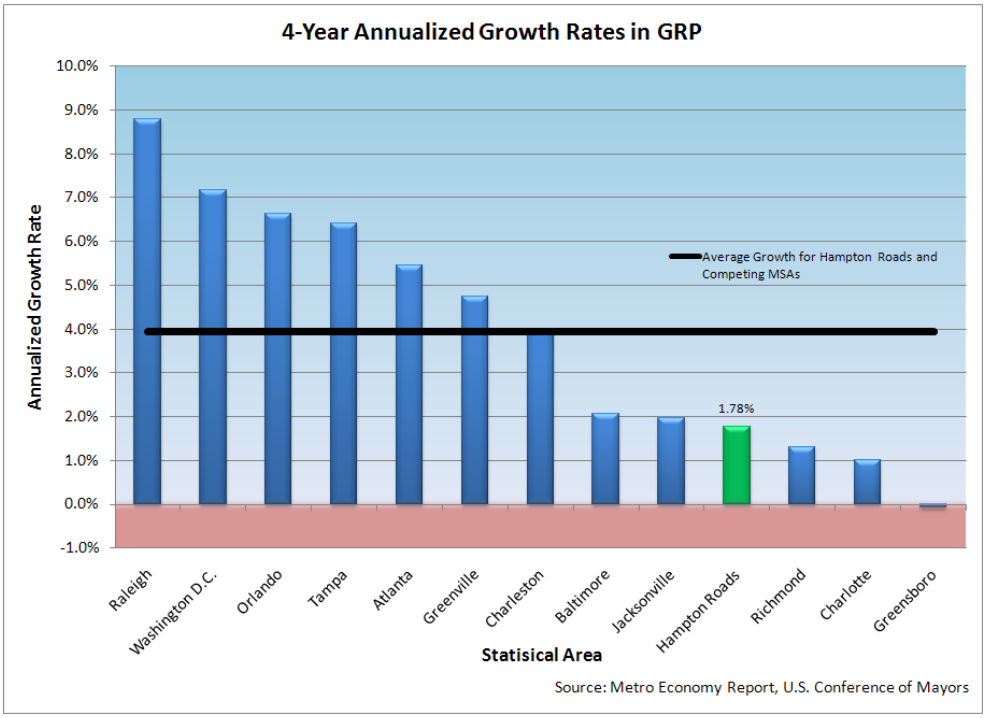
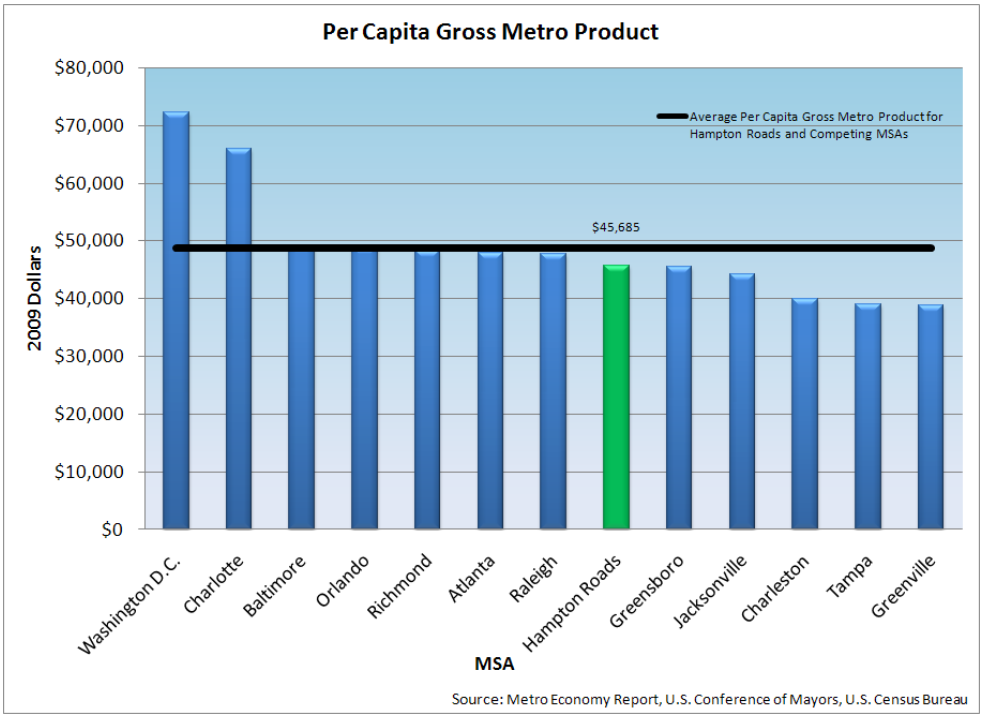


FIGURE 1.5 PER CAPITA GROSS METRO PRODUCT IN HAMPTON ROADS AND COMPETING METROPOLITAN AREAS



Why is it important:
Per capita gross metro product shows the average productivity for the Hampton Roads economy and for competing MSAs. Productivity is a measure of competitiveness.

How are we doing:
The per capita gross product in Hampton Roads is slightly below the average of our competing MSAs. It is clear that Washington D.C. and Charlotte produce at a much higher level per person than the other MSAs with which Hampton Roads competes.

FIGURE 1.6 ANNUAL GROWTH IN PER CAPITA GDP AND IN HAMPTON ROADS PER CAPITA GRP

Why is it important:
Growth in per capita GRP shows the level of progress and technological development in the region, and provides a benchmark for where the region will be in the near future as a measure of productivity growth.

How are we doing:
While the region has fared relatively well during this crises; over a longer time horizon, productivity growth in Hampton Roads has not kept pace with national growth.

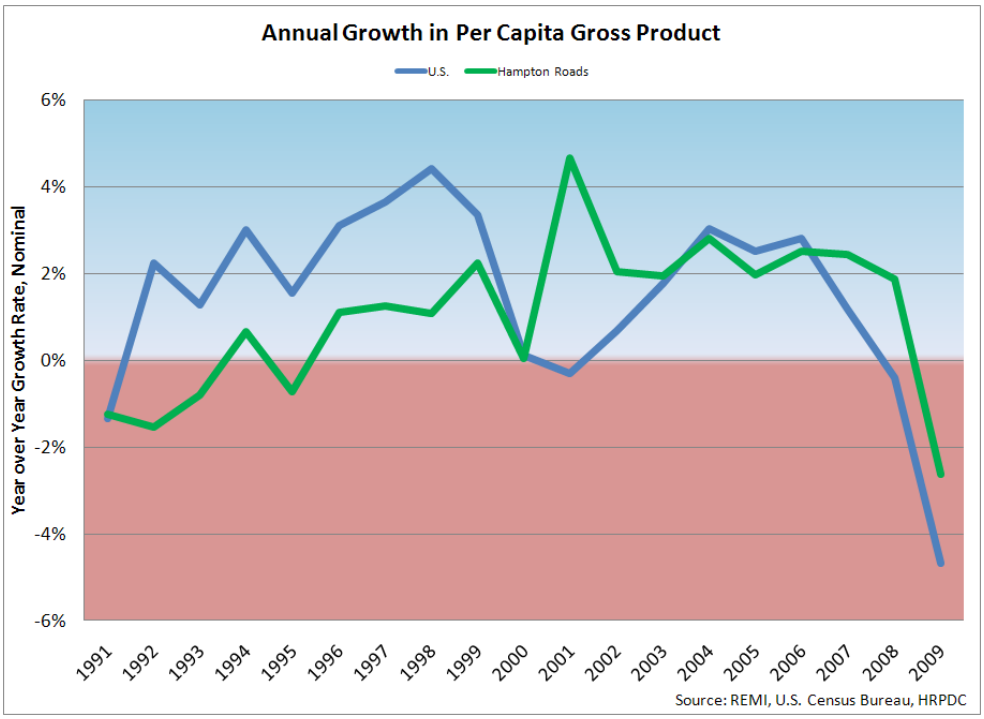
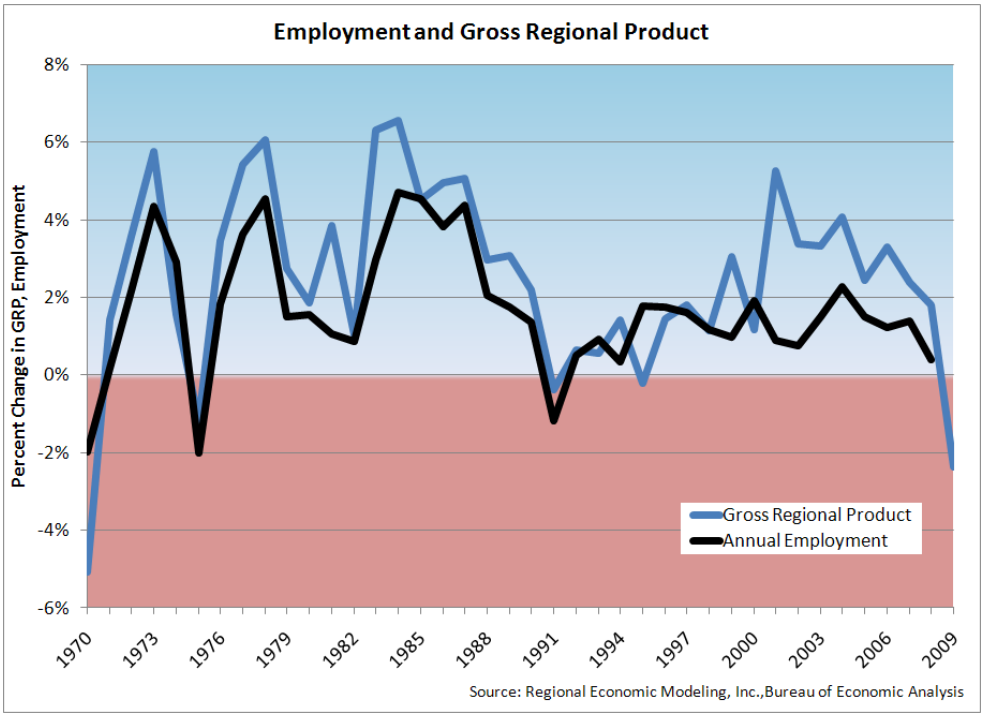


FIGURE 1.7 EMPLOYMENT AND GROSS PRODUCT IN HAMPTON ROADS



Why is it important:
Employment figures typically track gross product statistics, however, employment statistics are more readily available from a host of reliable sources. It is common practice to use employment information as a general indicator of economic well-being.

How are we doing:
The growth rate in gross product closely tracks the growth in Employment in Hampton Roads, suggesting that the regional level of employment is closely tied to economic prosperity.

FIGURE 1.8 YEAR OVER YEAR CHANGE IN HAMPTON ROADS' MONTHLY EMPLOYMENT

Why is it important:
Monthly data is naturally deseasonalized when compared to the same month of the previous year. This illustration removes the seasonal significance of monthly employment conditions.

How are we doing:
Hampton Roads employment has declined significantly during the last recession, but has recently returned to growth and at the current rate, should be able to return to old levels of employment in a few years. The size of the trough shows the magnitude of the recession that the region and nation has been grappling with.

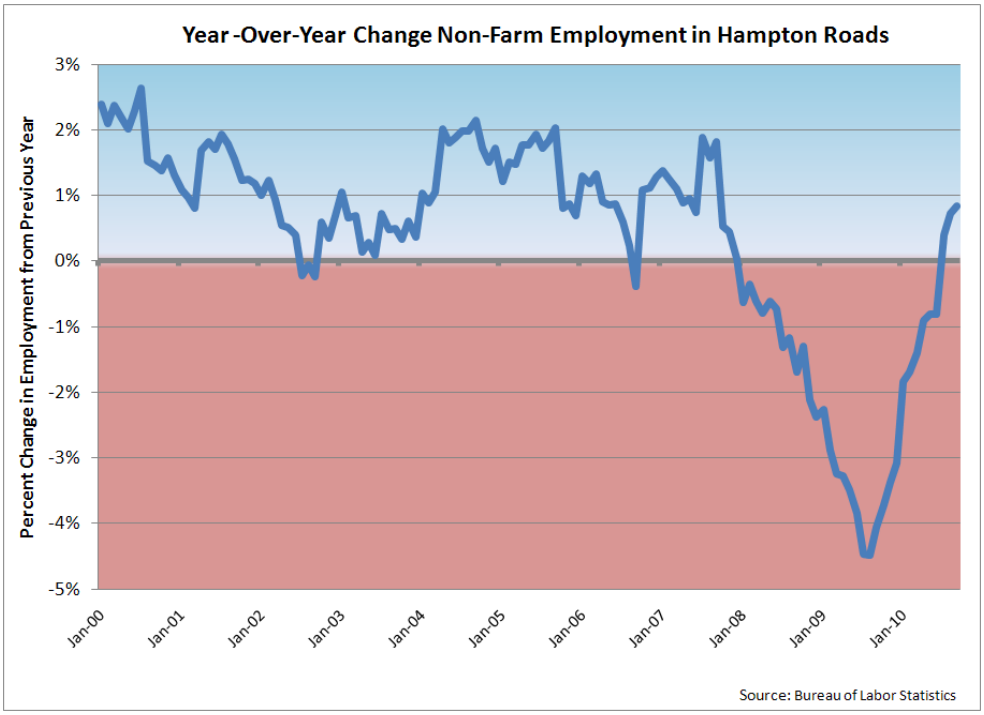
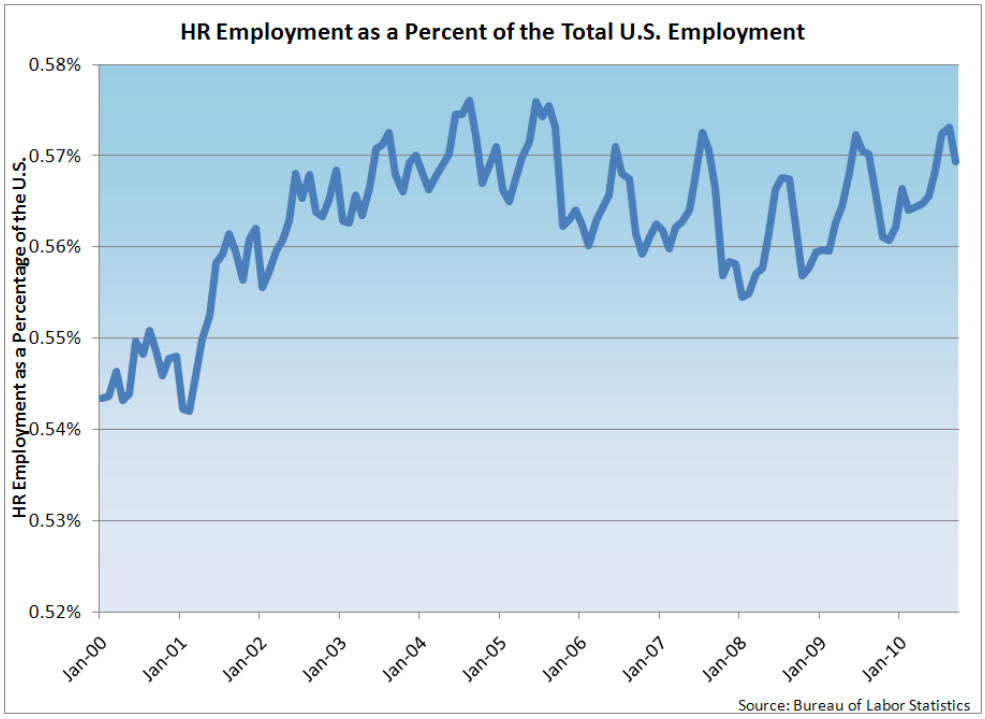


FIGURE 1.9 HAMPTON ROADS MONTHLY EMPLOYMENT AS A PERCENT OF THE UNITED STATES



Why is it important:
The local business cycle influences relative growth rates. Comparing local employment figures to national employment figures reveals how the local business cycle deviates from the national business cycle.

How are we doing:
Local employment growth out-paced U.S. employment growth between 2001 and 2005, and again during the first half of the current recession. Military spending helped the region weather the national economic downturns.

FIGURE 1.10 RECENT EMPLOYMENT GROWTH IN HAMPTON ROADS AND COMPETING METROPOLITAN AREAS

Why is it important:
A change in the level or regional employment often coincides with growth or declines in regional output. Comparing Hampton Roads to other southeastern metropolitan areas creates an opportunity to assess the competitive strength and growth prospects for the regional economy.

How are we doing:
Hampton Roads has experienced a level of growth below the US average during this time period. This data set (2005-2008) includes only the beginning of the recession, and Hampton Roads has weathered this recession better than most other regions.

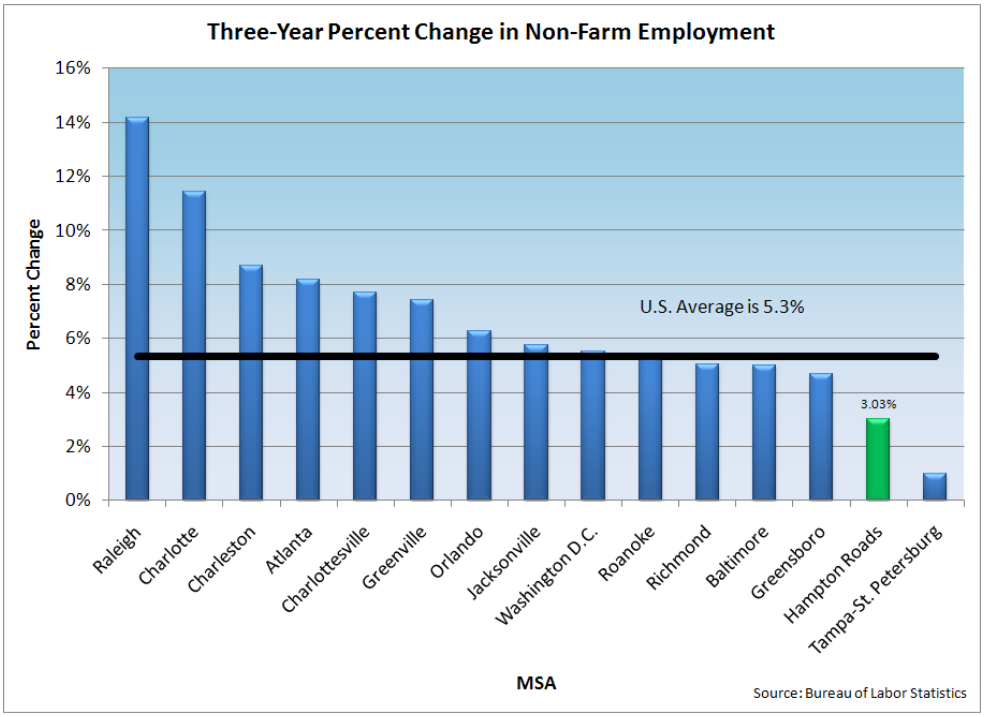
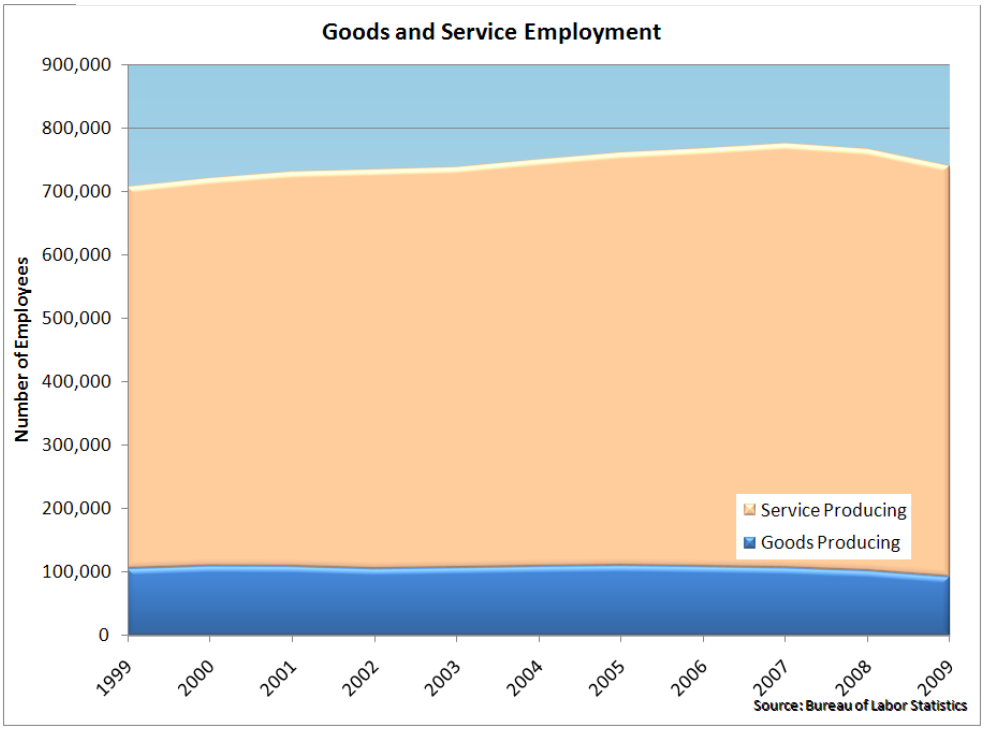


FIGURE 1.11 COMPARISON OF GOODS AND SERVICE EMPLOYMENT IN HAMPTON ROADS



Why is it important:
Historically, the goods sector has been large, playing a dominant role in the region's economy. In recent years, the service sector has grown more important. Services are now part of the export industry, brining in money from outside the region.

How are we doing:
Hampton Roads participates in the trend of declining manufacturing growth. The U.S. experienced a 23.9% decline in goods producing employment vs. a 12.4% decline in the region (1999-2009).

FIGURE 1.12 COMPARISON OF PUBLIC SECTOR AND PRIVATE SECTOR EMPLOYMENT IN HAMPTON ROADS

Why is it important:
Stable government employment can insulate an economy from volatile markets. Conversely, changes in government can exacerbate or counter market forces.

How are we doing:
Hampton Roads' employment has a large government component because of the numerous military bases in the region. While the government component remains significant, most of the employment growth in Hampton Roads has been in private sector jobs.

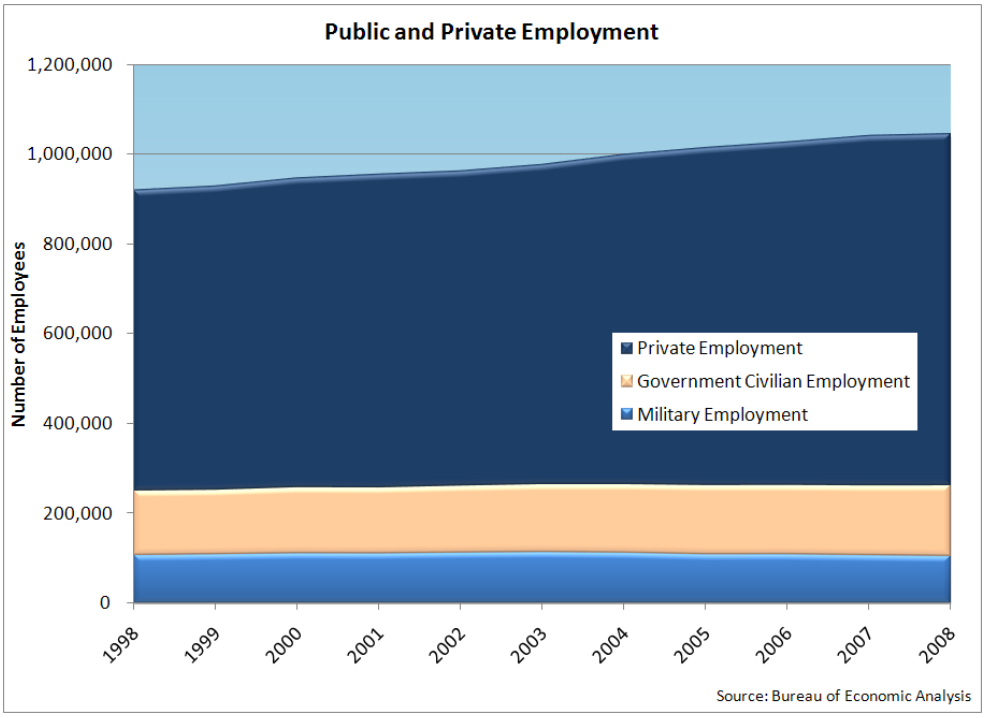
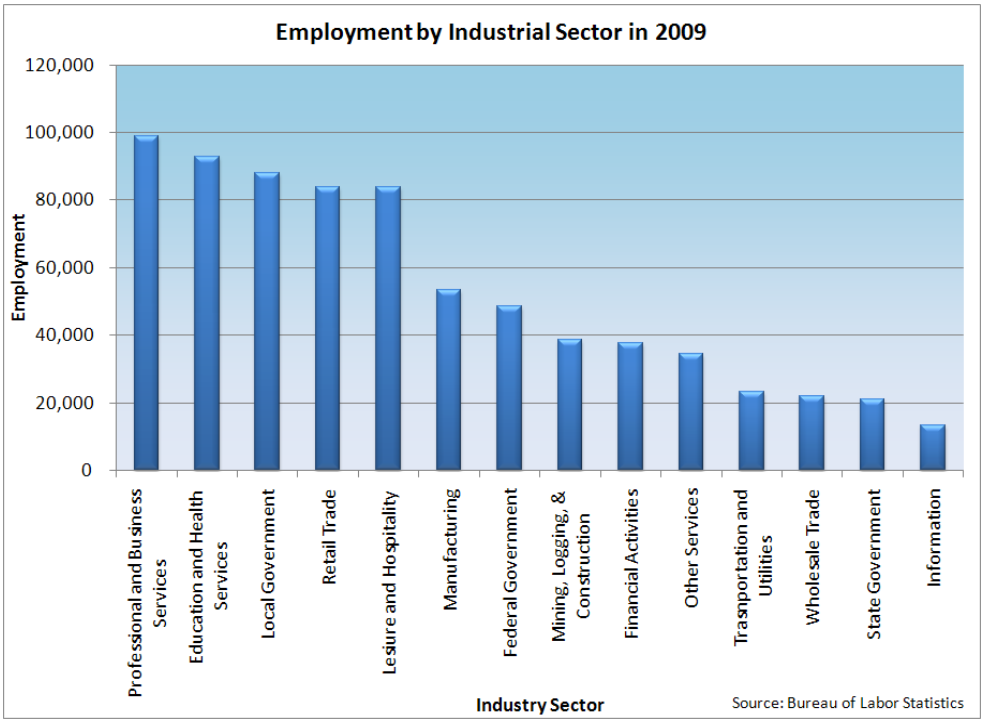


FIGURE 1.13 DISTRIBUTION OF EMPLOYMENT IN HAMPTON ROADS BY INDUSTRY SECTOR



Why is it important:
Regional economic behavior is heavily influenced by its sector composition. The current industrial make-up of a region will influence future economic growth.

How are we doing:
Professional and business services, retail trade, and local government employment have been the three largest employment sectors in Hampton Roads. Recently education and health services moved up to the top three.

FIGURE 1.14 CHANGE IN HAMPTON ROADS EMPLOYMENT BY INDUSTRIAL SECTOR FROM 2006 TO 2009

Why is it important:
Industrial employment is influenced by the business cycle. One can observe local trends by tracking changes in regional industrial employment.

How are we doing:
Hampton Roads realized a significant decline in employment in most of the regional industry base. Following a national pattern, all recent job growth occurred in government jobs, as well as the education and health industries that receive significant funding from the government.

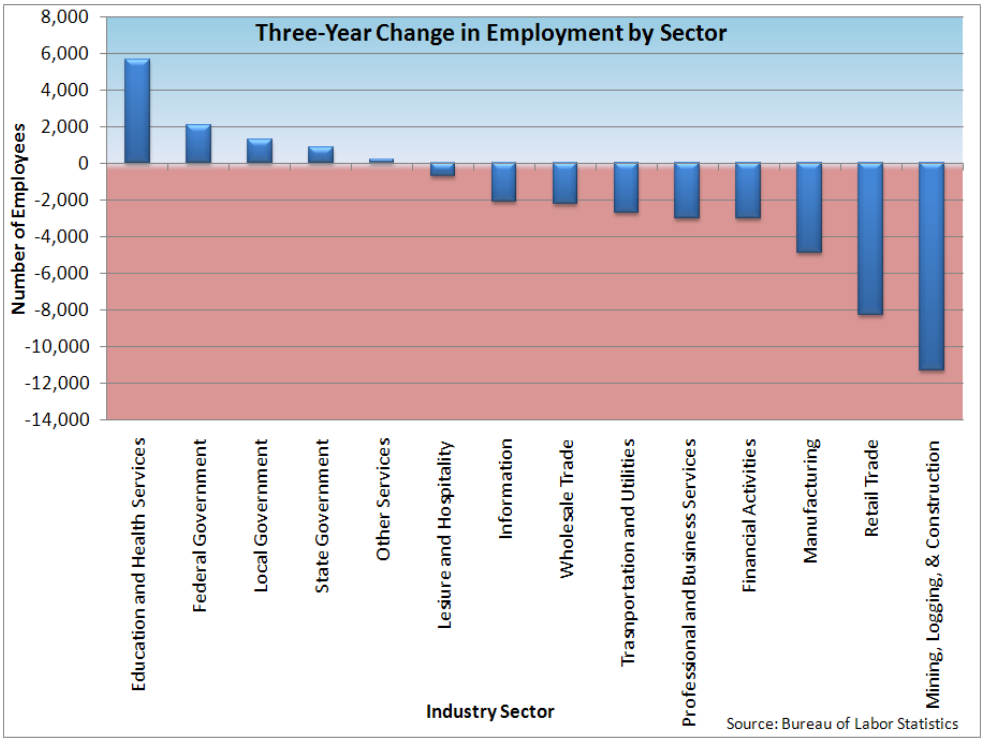
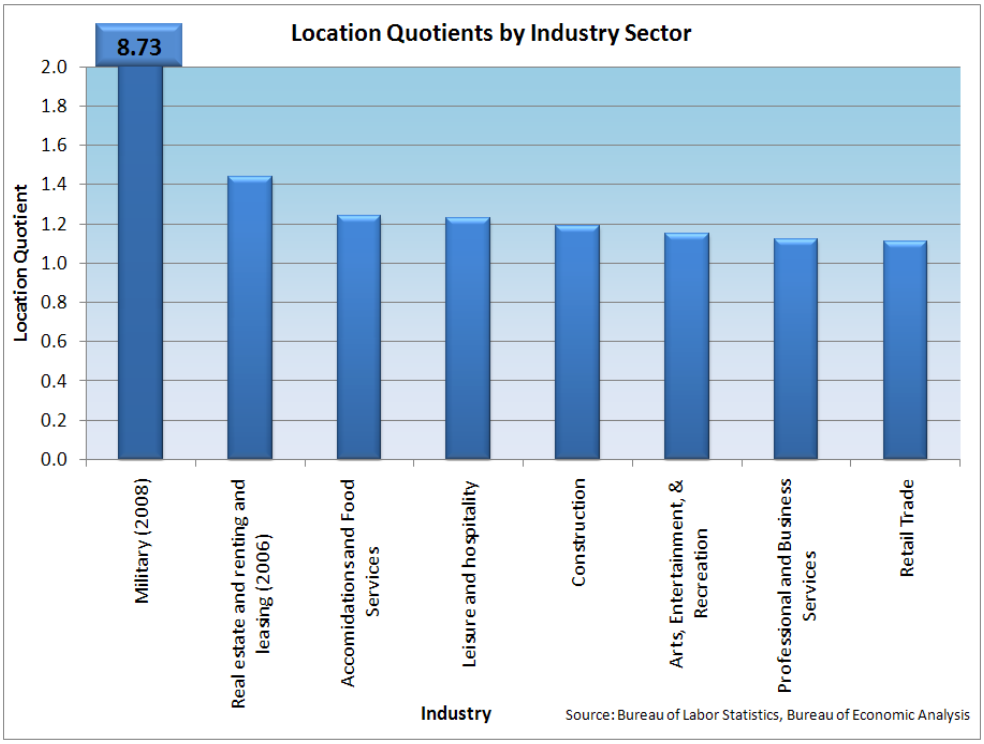


FIGURE 1.15 HAMPTON ROADS INDUSTRIAL LOCATION QUOTIENTS IN 2009



Why is it important:

Location quotient (LQ) are ratios that reveal the relative concentration of industry sector relative to a larger reference area.Location quotients identify competitive advantages by comparing regional employment distributions to national employment distributions. LQs greater than one suggest a comparative advantage.

How are we doing:

It is well known that Hampton Roads has a large concentration of military personnel, as is evident from its location quotient. Figure 1.15 also illustrates high concentrations in other industries associated with tourism, the ports, retail, and construction.

FIGURE 1.16 HAMPTON ROADS SUB-SECTOR LOCATION QUOTIENTS IN 2009

Why is it important:

Sub-sector location quotients reveal specific industries that have a high regional concentration. The industries listed in Figure 1.16 all have a location quotient above 1. These sub-sector industries represent the backbone of the private sector economy in Hampton Roads.

How are we doing:

Water transportation, attractions, and transportation equipment manufacturing have the three highest private sector industrial location quotients in Hampton Roads pointing to the economy clusters associated with the ports and the region's tourism industry.

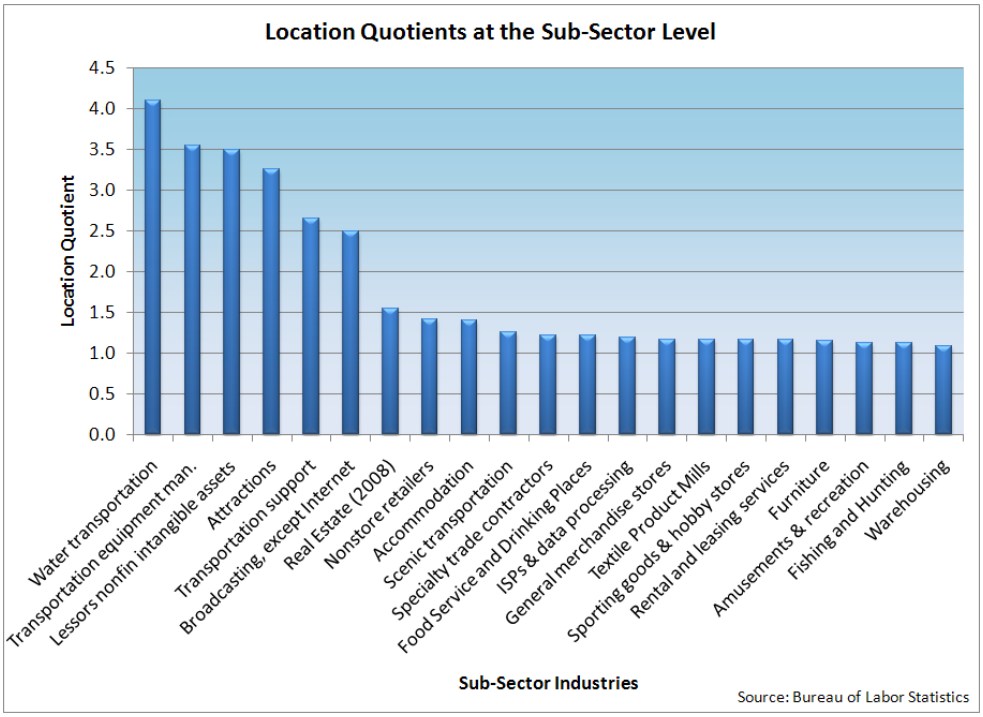
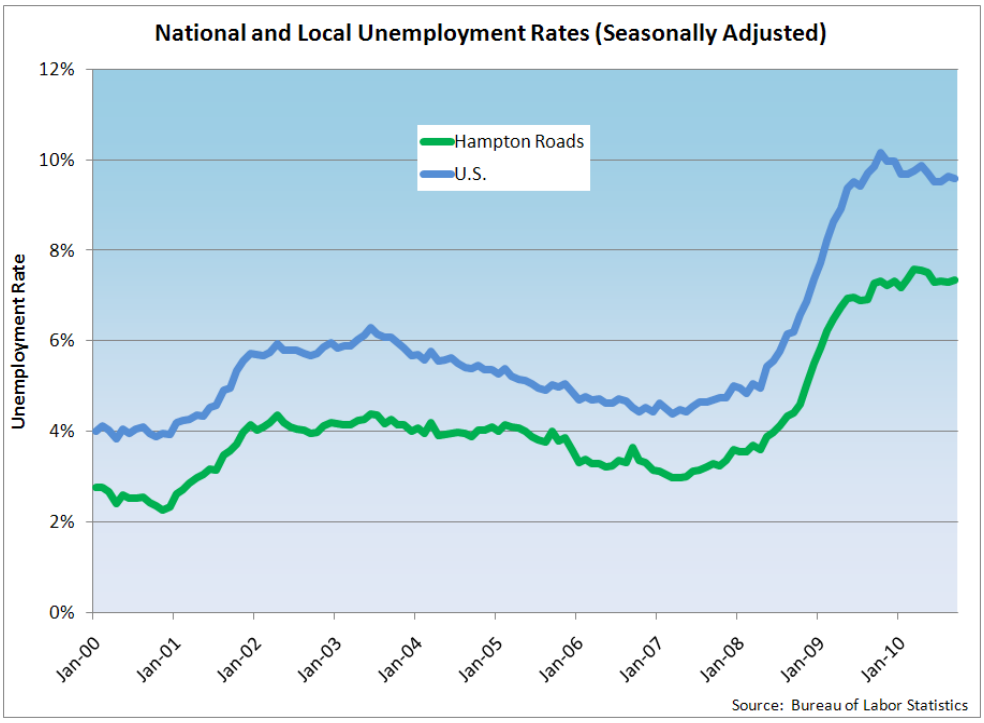


FIGURE 1.18 EMPLOYMENT TO POPULATION RATIOS IN HAMPTON ROADS AND COMPETING METRO AREAS



Why is it important:
Unemployment rates reflect both the general well-being of the labor force and the ability of the labor force to meet the needs of employers. Comparing the regional unemployment rate to the national rate enables one to assess the condition of the regional labor market over time.

How are we doing:
Hampton Roads has historically had low unemployment rates, though the unemployment rate has climbed recently on both the national and regional level.

FIGURE 1.17 DESEASONALIZED UNEMPLOYMENT RATES IN HAMPTON ROADS AND THE UNITED STATES

Why is it important:
Hampton Roads competes with other metro areas at a number of levels. When comparing employment and income statistics, it is important to consider the employment to population ratios. A small increase or decrease in this ratio can drastically alter other benchmarking indicators.

How are we doing:
At 62.6%, Hampton Roads' employment to population ratio is slightly below the average of reference metro areas.

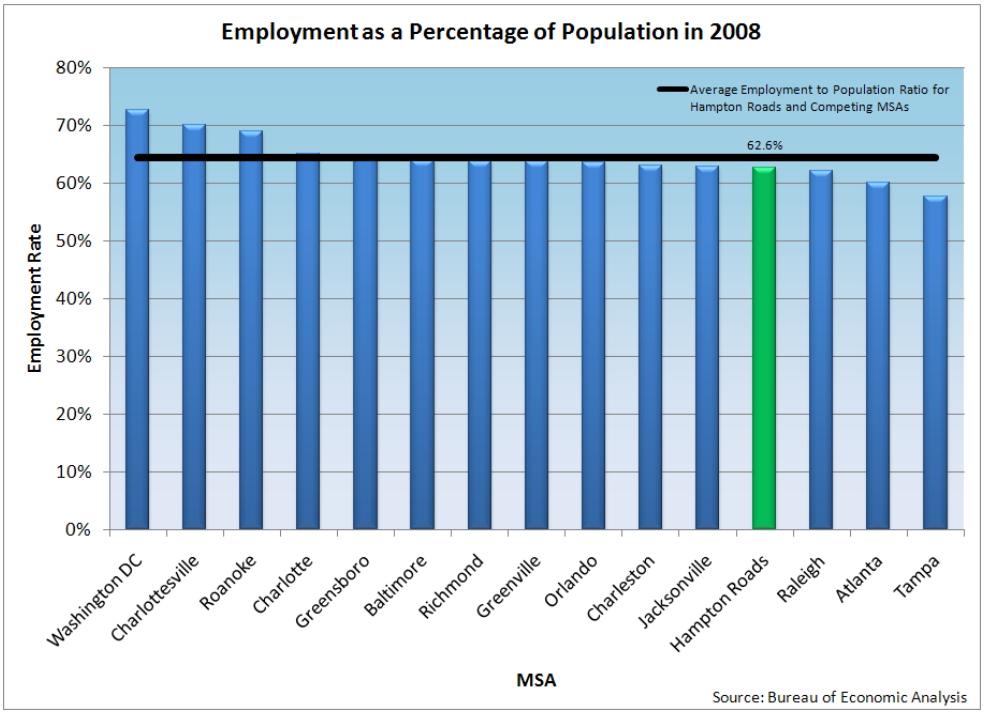
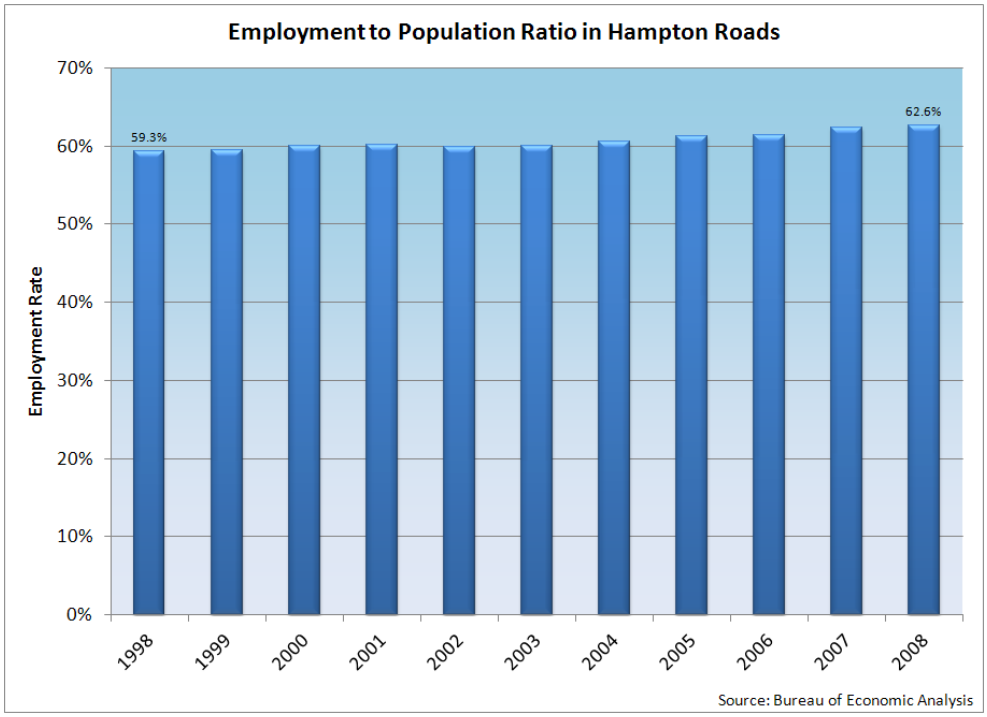


FIGURE 1.19 HISTORIC EMPLOYMENT TO POPULATION RATIOS IN HAMPTON ROADS



Why is it important:
Changing employment to population ratios can be the result of either economic or demographic changes. Considering changes in the employment to population ratio in combination with demographic and economic changes will result in a better understanding of the market.

How are we doing:
The ratio has increased steadily since 2005, but it is poised to decline as the baby boom generation begins to retire and limited employment opportunities remove employees from the market.

FIGURE 1.20 PER CAPITA INCOME IN HAMPTON ROADS AND COMPETING METRO AREAS

Why is it important:
Per capita income is the most widely available statistic on economic well-being. Per capita income is estimated by dividing total personal income by the population of the region.

How are we doing:
Hampton Roads per capita income just passed the national average for the first time in our records. Growth in D.O.D. related income at the regional level and declining incomes throughout the U.S. have enabled the region to gain parity with the nation.

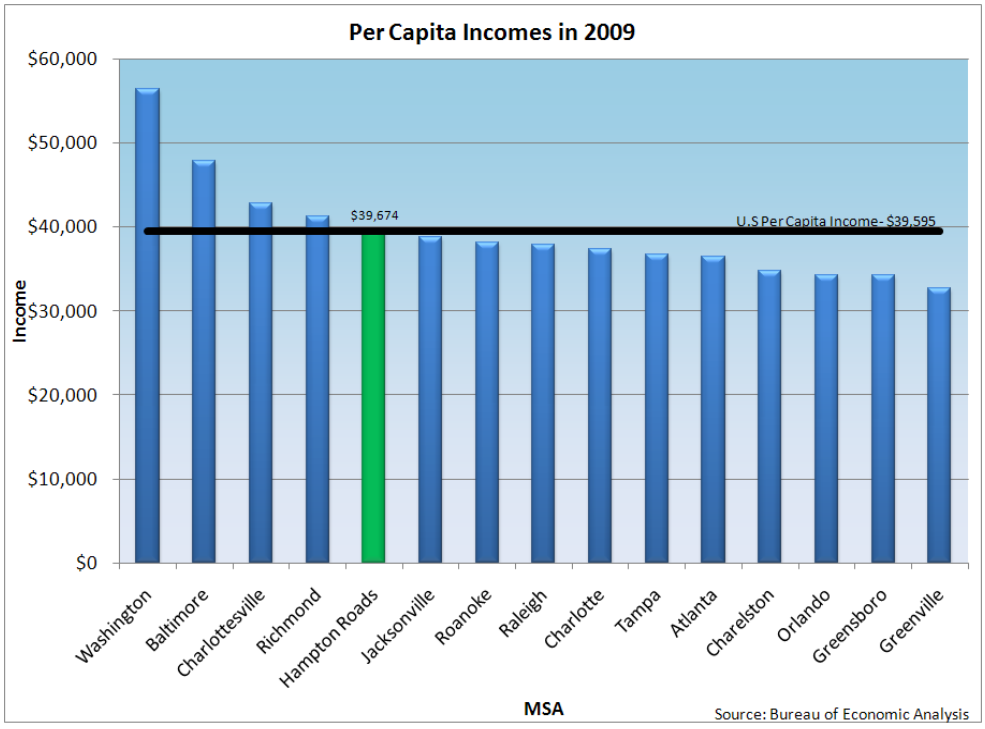
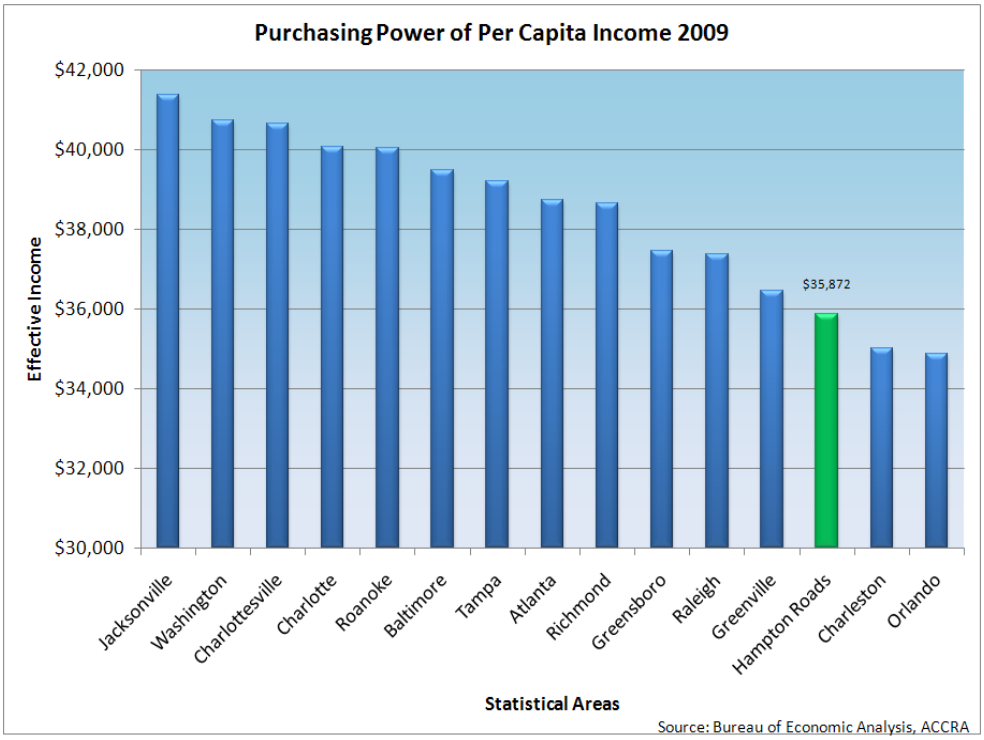


FIGURE 1.21 PURCHASING POWER OF PER CAPITA INCOME IN HAMPTON ROADS AND COMPETING METRO AREAS IN 2009



Why is it important:
The cost of living can vary substantially between metropolitan areas. Understanding incomes within the context of the cost of living provides a clearer picture as to real purchasing

How are we doing:
Regional increases in the cost of housing coupled with modest income grow have diminished the purchasing power of Hampton Roads' residents. When the cost of living increases at a faster rate than wages, real income decreases and residents are left with less purchasing power.

FIGURE 1.22 HAMPTON ROADS PER CAPITA INCOME IN RELATION TO THE NATIONAL AVERAGE

Why is it important:
Fluctuations in relative incomes reflect the fluctuations in standards of living.

How are we doing:
Hampton Roads' per capita income (PCI) has been consistently below the national average. Military pay increases as well as increased defense spending helped to close the gap in the first half of this decade, and Hampton Roads relatively strong performance during the first year of the recession allowed the region to finally reach the nationwide average.

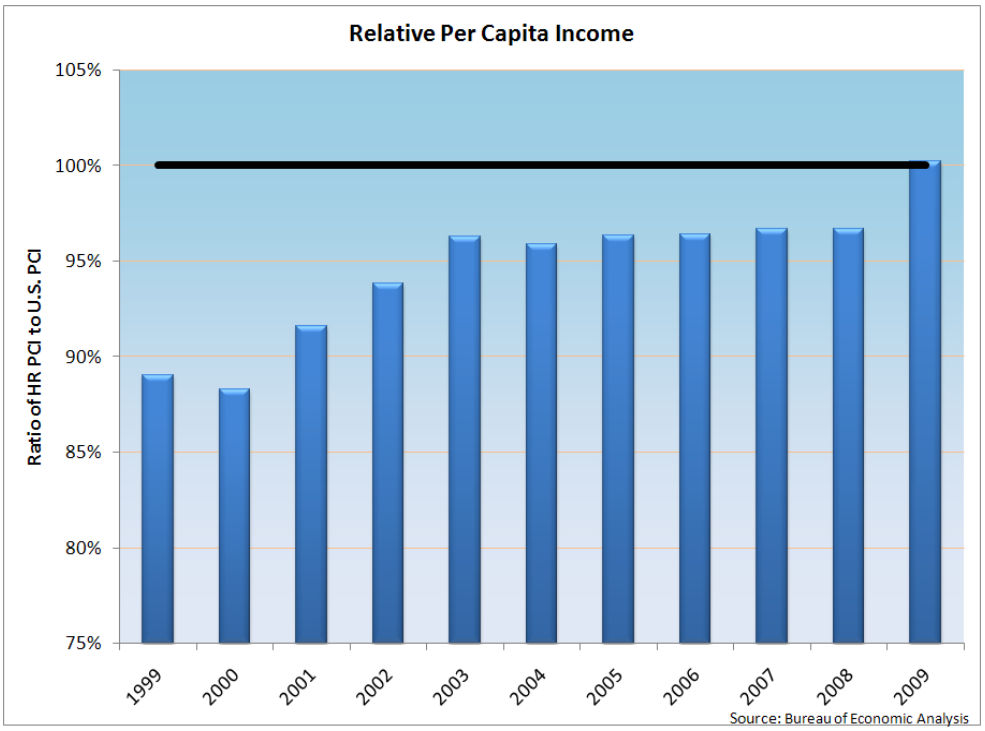
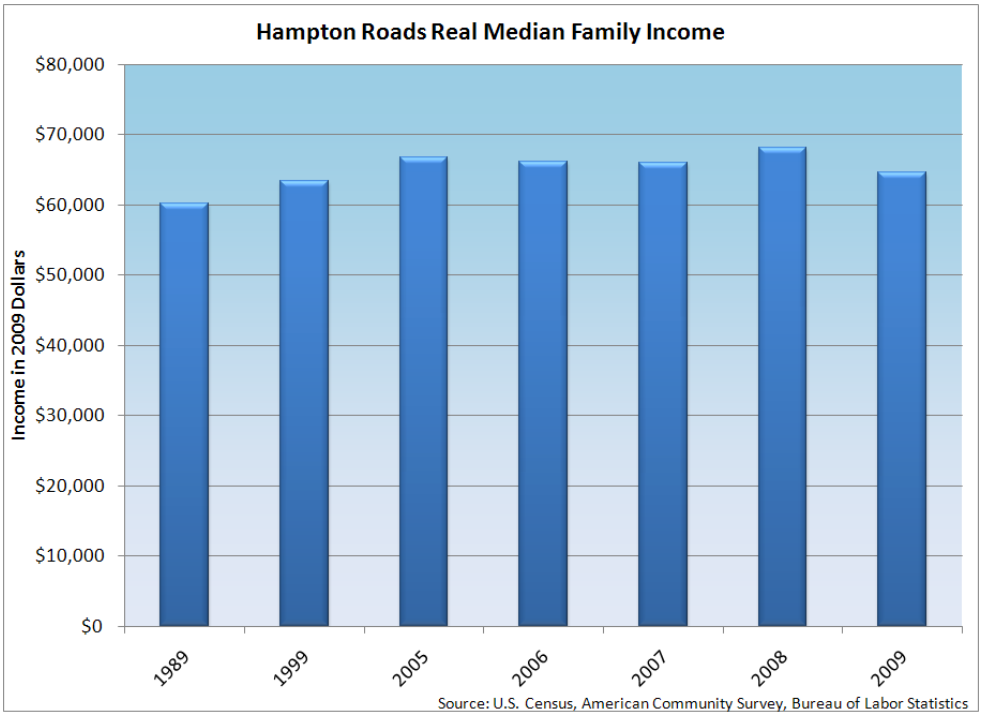


FIGURE 1.23 MEDIAN FAMILY INCOME IN HAMPTON ROADS



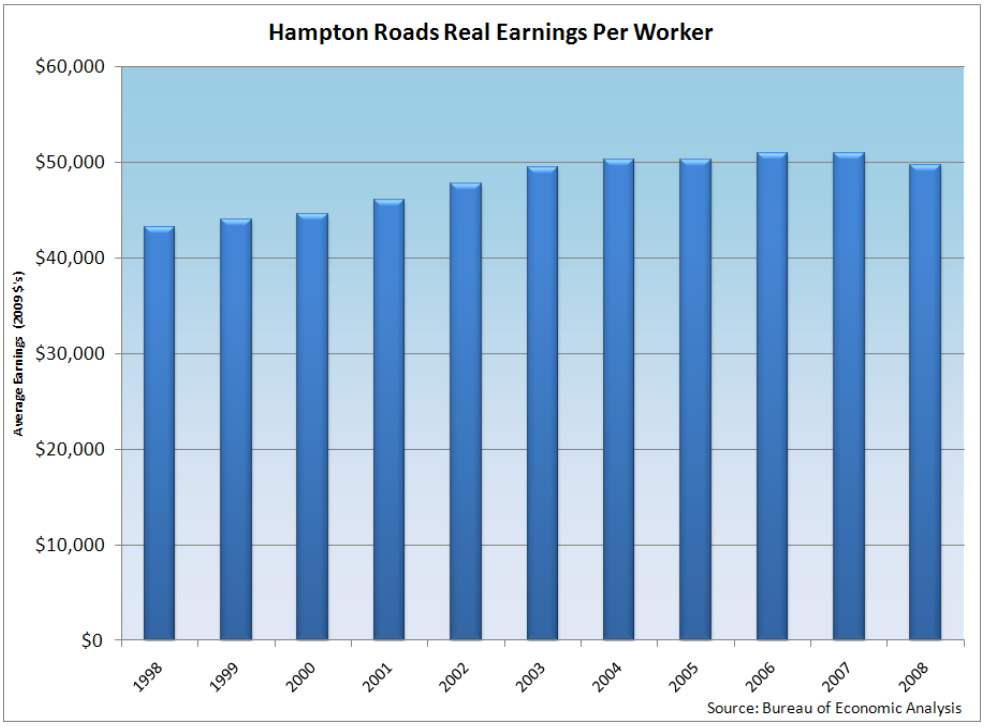
Why is it important:
The median family income represents the general wellbeing of regional households. Families are the fundamental purchasing unit for many products and services.

How are we doing:
Real median family incomes have remained fairly constant over the last two decades, though they have declined off record highs as a result of the recession.

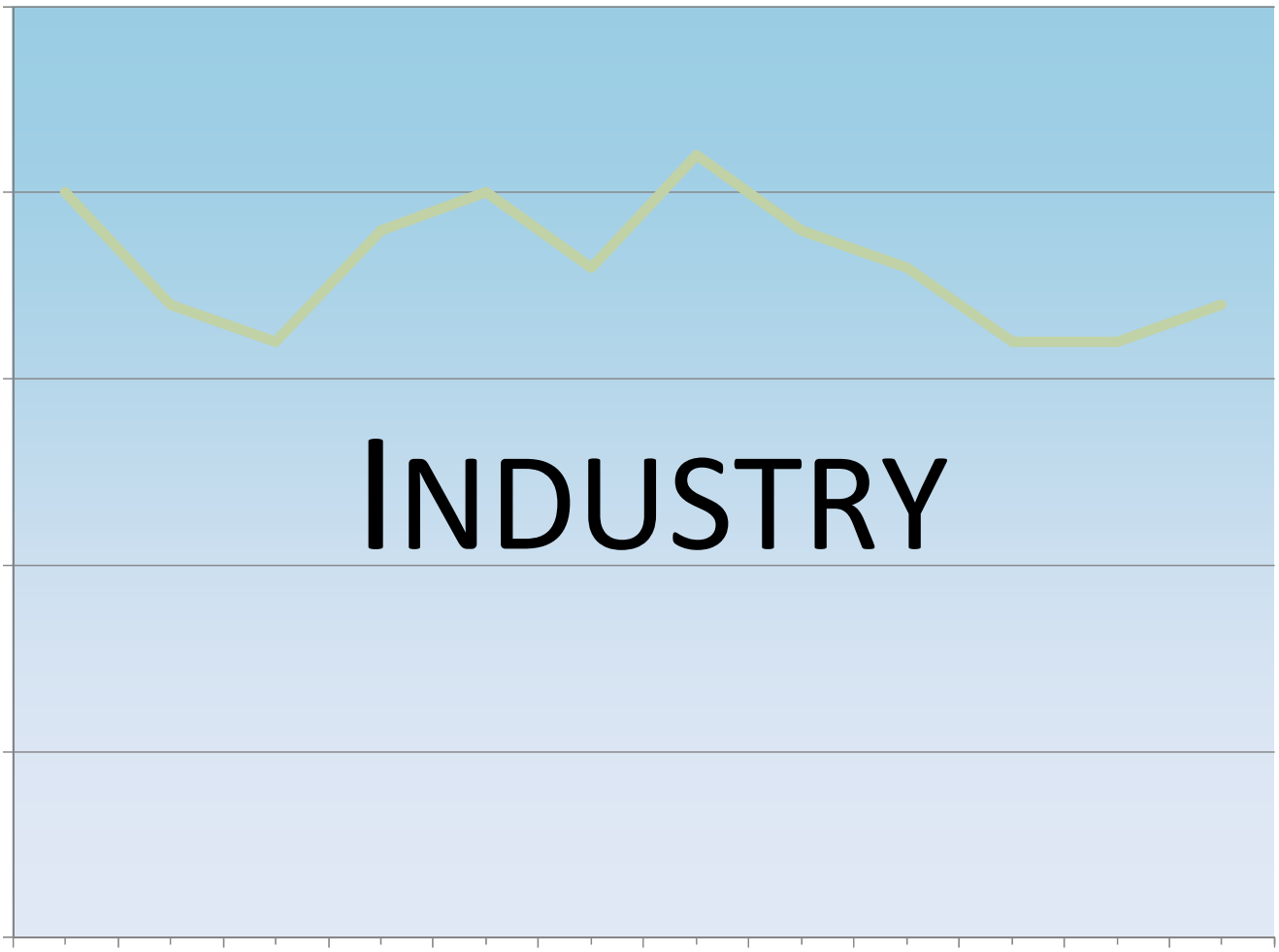
FIGURE 1.24 EARNINGS PER WORKER IN CONTSTANT DOLLARS

Why is it important:
One indicator of productivity is earnings-per-worker. Employment shifts from low to high paying jobs along with increased salaries both suggest increased productivity. Stable employment and slow growth in earnings are a sign of limited productivity.

How are we doing:
Inflation adjusted earnings-per-worker in Hampton Roads have been slowly increasing since the mid nineties until this past years decline.



SECTION II



The Industry section reviews the current state of several important industries in the region, including: the military, shipbuilding, the ports, and tourism.

Industry

While attempts to diversify the regional economy continue, several industry clusters play a vital role in the economy. These basic sector industries bring outside dollars into the region and enable economic growth within the region's non-basic sectors. Unfortunately, declining basic sector industries leave the region vulnerable to weakness throughout the economy (the effects of the steel industry on the rust belt and the car industry on the state of Michigan are excellent cautionary tales of industry dependence).

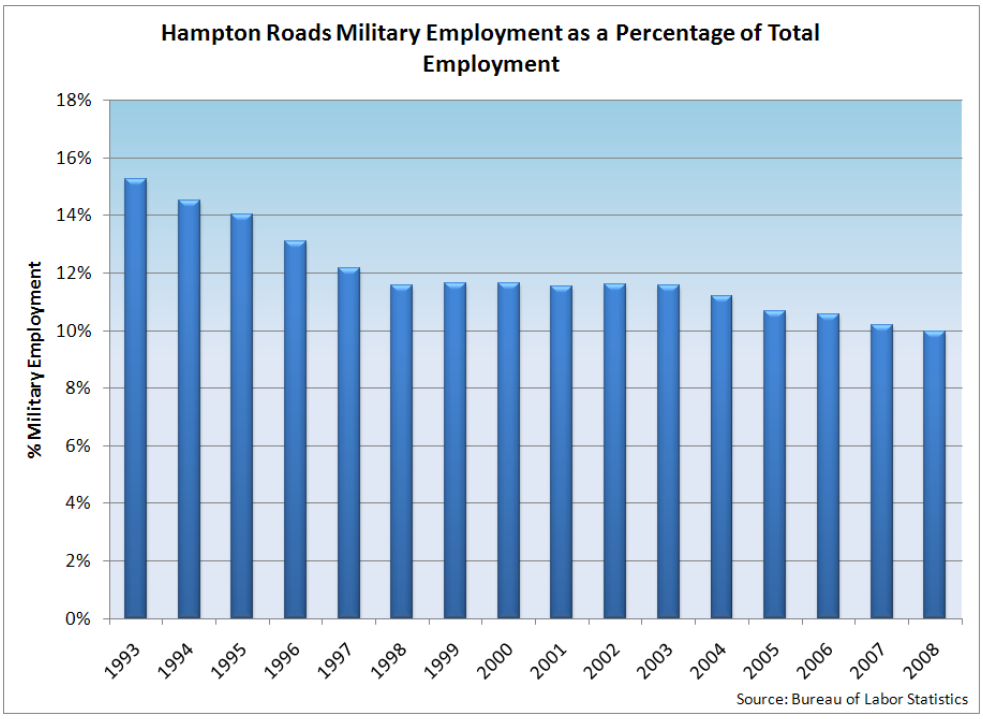
The Defense Sector, both through direct military employment and through contractors and civilian employees, continues to have the greatest impact on this region's growth. While military employment as a percentage of total employment continues to decline, the large wage and benefits packages military personnel receive, as well as the consistent pay increases, have maintained Hampton Roads' economy through the past several downturns. While real defense outlays have been increasing over the past decade, concerns over the budget as well as the political process will continue to place Hampton Roads' military assets at risk. The shipbuilding and repair contractors in the region are also tied to the defense industry, as military vessels comprise the vast majority of the shipbuilding and repair industry.

Another key industry for the region are the Ports, which interact with a variety of shipping and logistics companies. The port experienced a significant decline in shipments as a result of the recession that began in December 2007. The decline in the global demand was reflected in global trade, a process that accelerated in the 4th quarter of 2008.

In addition to the port, Hampton Roads benefits from a wealth of tourist venues. The Historic Triangle and the region's significant water resources are a constant source of attraction both regionally, and from abroad. Belt tightening across the nation has impacted the region's leisure and hospitality industries. Declining hotel receipts have reflected the reduced travel expenditures of both tourists and businesses alike.

Finally, the construction industry continues to face strong headwinds with the housing market. The lack of demand for housing coupled with a significant adjustment to real estate prices will not allow the construction industry to play its usual role in bringing both the nation and this region out of recession.

FIGURE 2.1 CONCENTRATION OF MILITARY EMPLOYMENT



Why is it important:
The Hampton Roads metro area houses one of the largest assemblies of military personnel in the world. The Department of Defense is the single largest employer in Hampton Roads. As a result, military employment plays a critical role in the economy.

How are we doing:
Decreasing military employment coupled with increasing employment in the private sector reduced the concentration of military in Hampton Roads from 1993 to 1998 and from 2003-2008.

FIGURE 2.2 CYCLE OF NATIONAL DEFENSE SPENDING

Why is it important:
Defense expenditures in Hampton Roads are closely tied to federal defense outlays. National defense spending has a direct impact on the regional economy.

How are we doing:
National defense spending increased during the Reagan administration and fell during the collapse of the USSR. Defense spending began increasing again around the turn of the century, helping Hampton Roads to avoid recession. With real defense outlays approaching a peak, and increasing talks of curbing defense expenditures, this level of spending seems to be unsustainable.

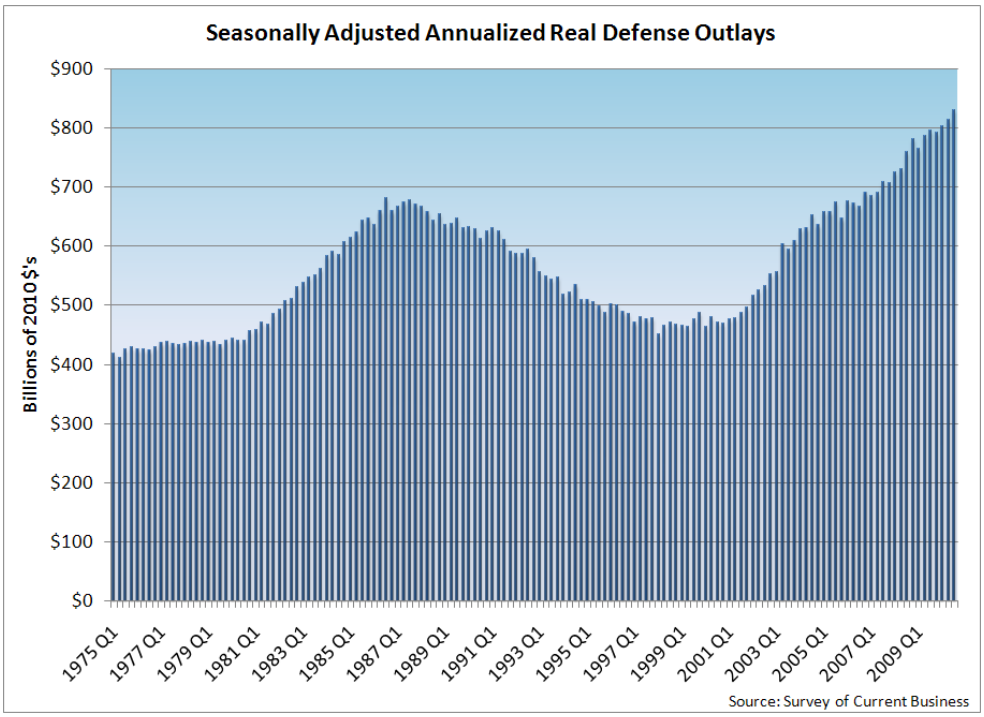
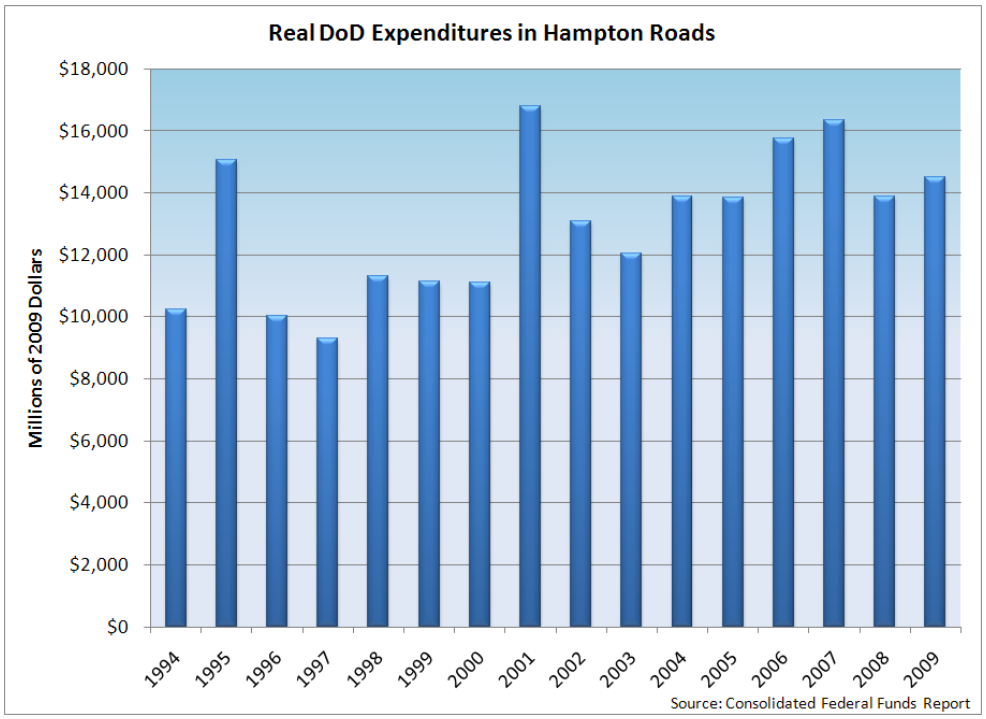


FIGURE 2.3 INFLATION-ADJUSTED DEPARTMENT OF DEFENSE SPENDING IN HAMPTON ROADS



Why is it important:
Department of Defense spending in Hampton Roads is one of the region's primary expenditure streams. As a result, changes in defense spending can have a significant impact on the regional business cycle.

How are we doing:
Defense expenditures in Hampton Roads have stabilized the economy, and rising real defense spending in the region has moderate dthe effects of the current slowdown/recession. There have been several efforts to reallocate Hampton Roads facilities and forces to other parts of the country.

FIGURE 2.4 TOTAL MILITARY EMPLOYMENT IN HAMPTON ROADS

Why is it important:
The largest employment sector in Hampton Roads is the military. Trends in military employment are used in forecasting regional economic growth and in interpreting historical economic changes.

How are we doing:
After losing a significant number of military personnel in the nineties, military employment in Hampton Roads saw a modest increase in the early part of this decade. Since 2003 military employment has declined as a percentage of Hampton Roads employment.

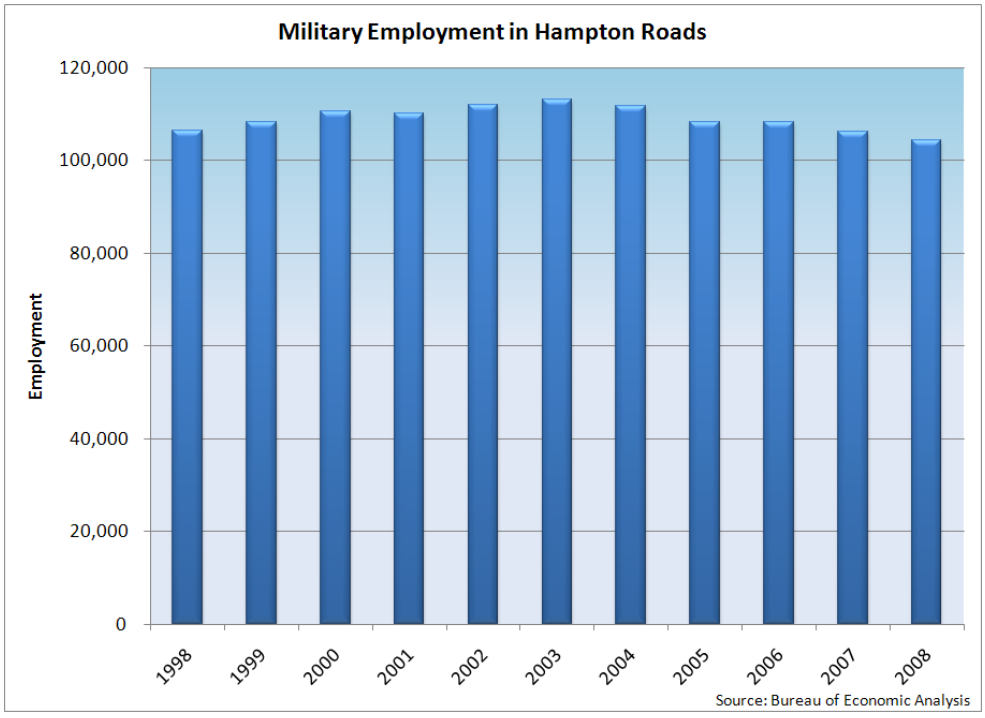
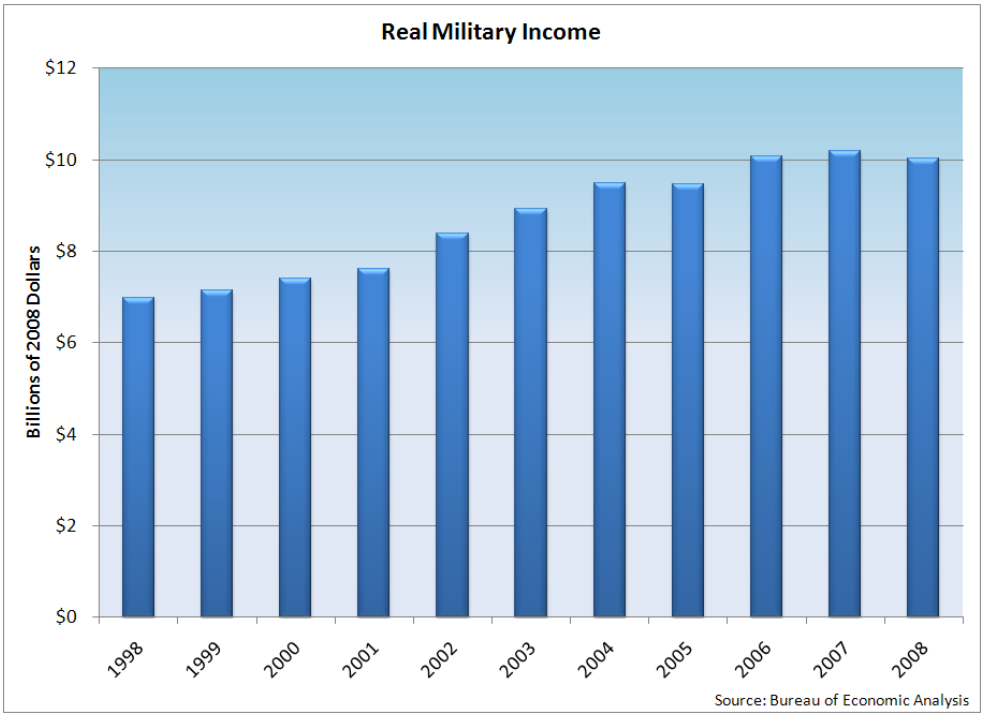


FIGURE 2.5 INFLATION ADJUSTED MILITARY INCOME



Why is it important:
The economic benefit of military employment in Hampton Roads is directly related to military incomes and the resulting expenditures by military personnel. As income increase, so do contributions to the local economy.

How are we doing:
Military incomes have risen substantially since 1998 due in part to increases in military pay, but real incomes did not rise between 2006 and 2008 due to nationwide inflation. Real military incomes should rise in 2009.

FIGURE 2.6 CONCENTRATION OF SHIPBUILDING AND REPAIR EMPLOYMENT IN HAMPTON ROADS

Why is it important:
The shipbuilding and repair industry in Hampton Roads was a direct result of the region's disposition as a natural harbor. Over the years there has been a decline in the national shipbuilding and repair industry, as foreign markets have become more competitive. Today Hampton Roads remains one of the few areas in the U.S. specializing in ship repair.

How are we doing:
Shipbuilding and repair in Hampton Roads are closely tied to DoD contracts, and future demand by the Navy will determine the level of employment in the shipbuilding field.

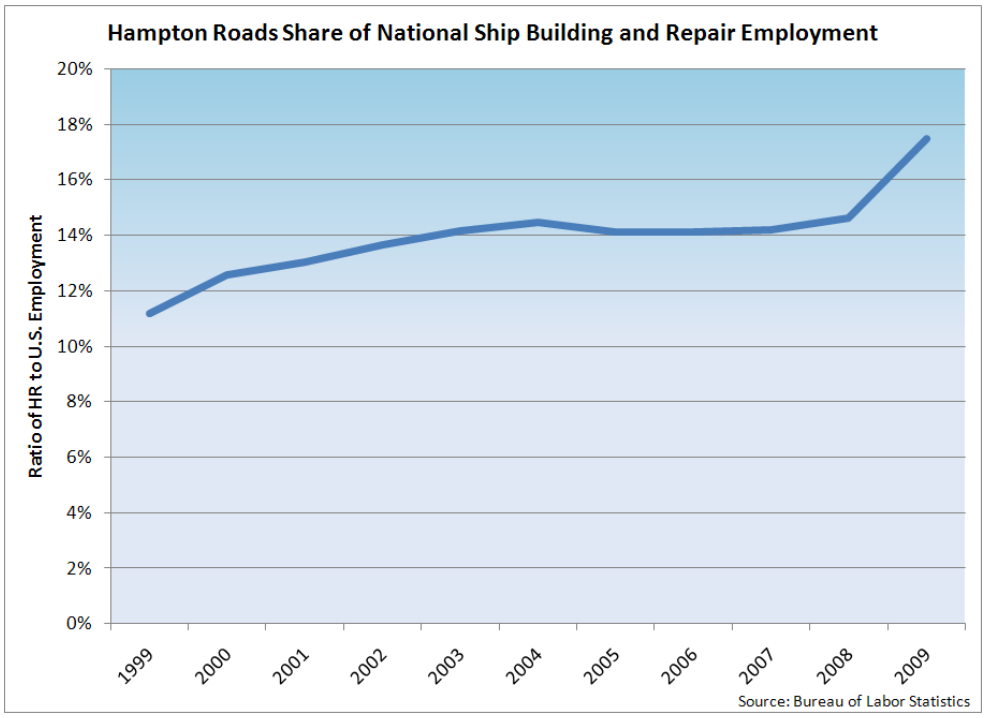
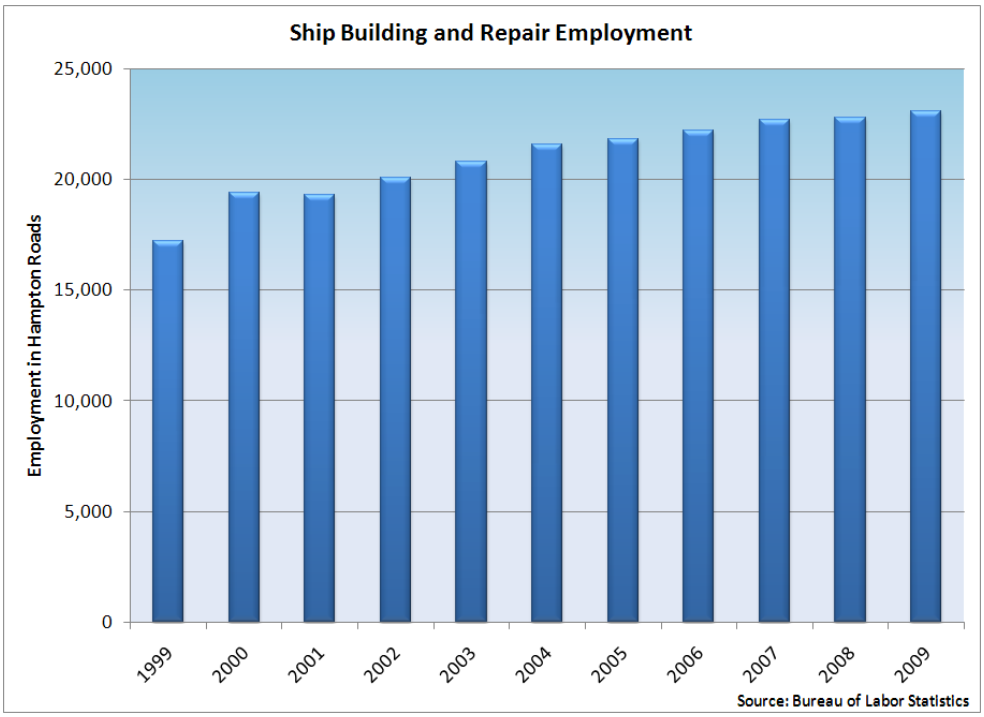


FIGURE 2.7 TOTAL SHIPBUILDING AND REPAIR EMPLOYMENT IN HAMPTON ROADS



Why is it important:
As a major industry in Hampton Roads, trends in the ship-building and repair industry play an important role in the economic strength of the region.

How are we doing:
Ship building and repair in Hampton Roads declined over the latter half of the nineties before beginning to grow slowly over the past 6 years. The shipbuilding and repair industry is closely tied to military contracts.

FIGURE 2.8 DISTRIBUTION OF MARKET SHARE FOR EAST COAST PORTS

Why is it important:
The Port of Hampton Roads is a vital part of the region's economic engine. There is constant competition for port traffic on the east coast. Figure 2.8 identifies the major east coast ports and their market share.

How are we doing:
12.6% of the total east coast container traffic flowed through the Hampton Roads region last year, making it the third largest container port on the Atlantic. The Port of Virginia has averaged 13.1% of East Coast Markets since 1990.

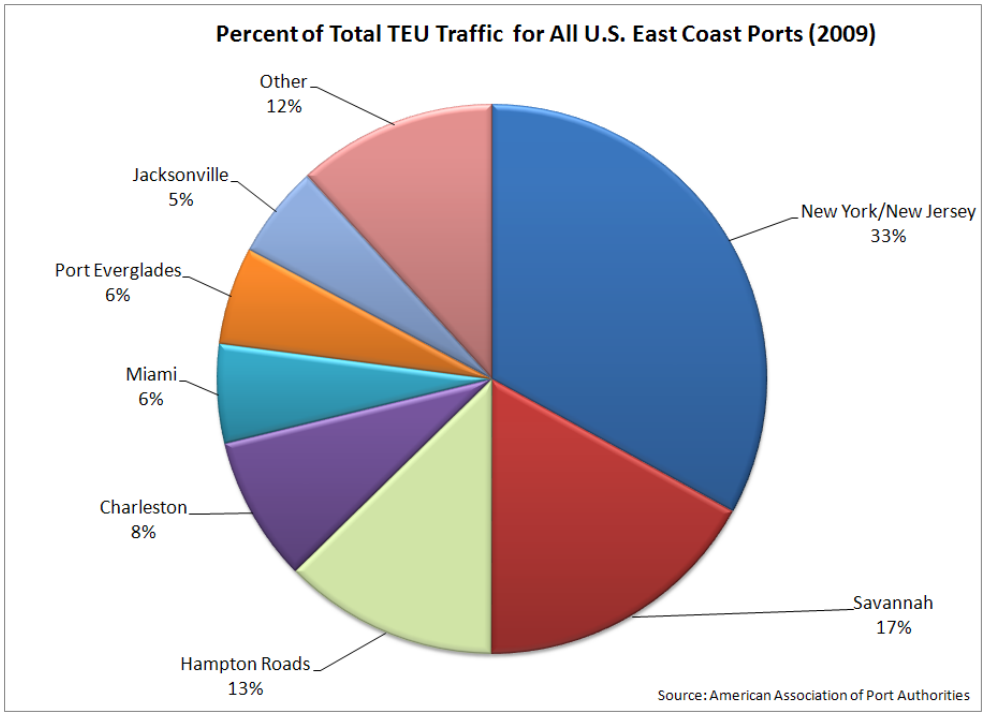
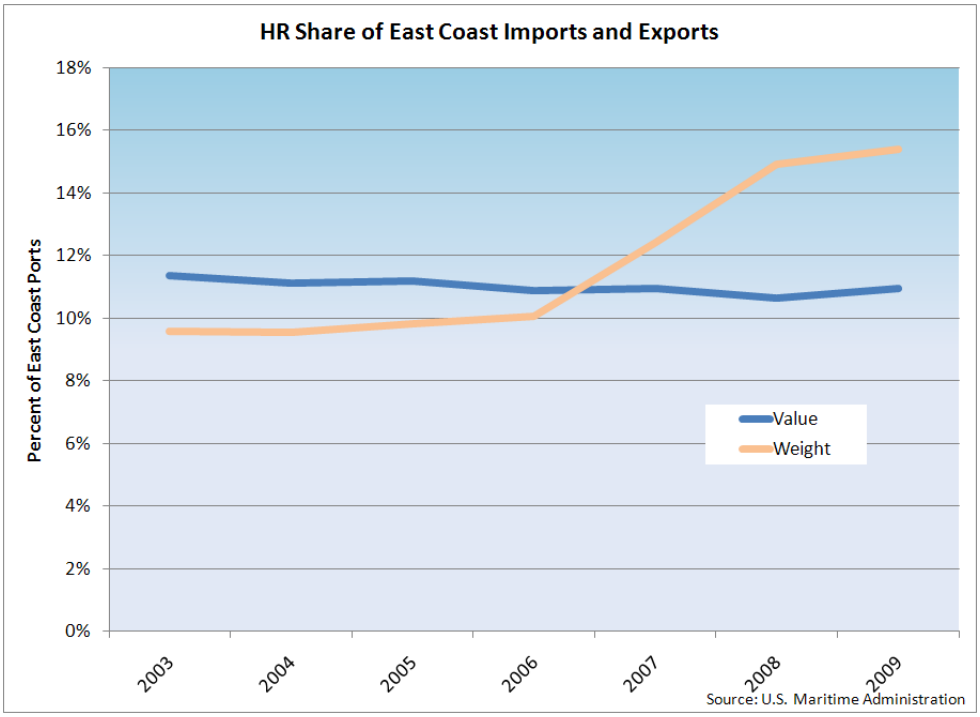


FIGURE 2.9 HAMPTON ROADS MARKET SHARE OF IMPORTS & EXPORTS AT EAST COAST PORTS



Why is it important:
In order to remain a viable industry in Hampton Roads, the Port of Virginia must be competitive with other east coast ports.

How are we doing:
The value of Hampton Roads' market share has held relatively constant over the past decade. Capacity at the ports is expected to grow, though there may be transportation infrastructure limitations to the total level of growth.

FIGURE 2.10 FOREIGN AND DOMESTIC VESSEL DEPARTURES

Why is it important:
In order to better understand trends in the demand for port services it is important to recognize the source and destination of port traffic.

How are we doing:
The number of vessels moving through Hampton Roads largely rests on the global economic climate and the global demand for goods. There have been large declines in port calls during the past two recessions.

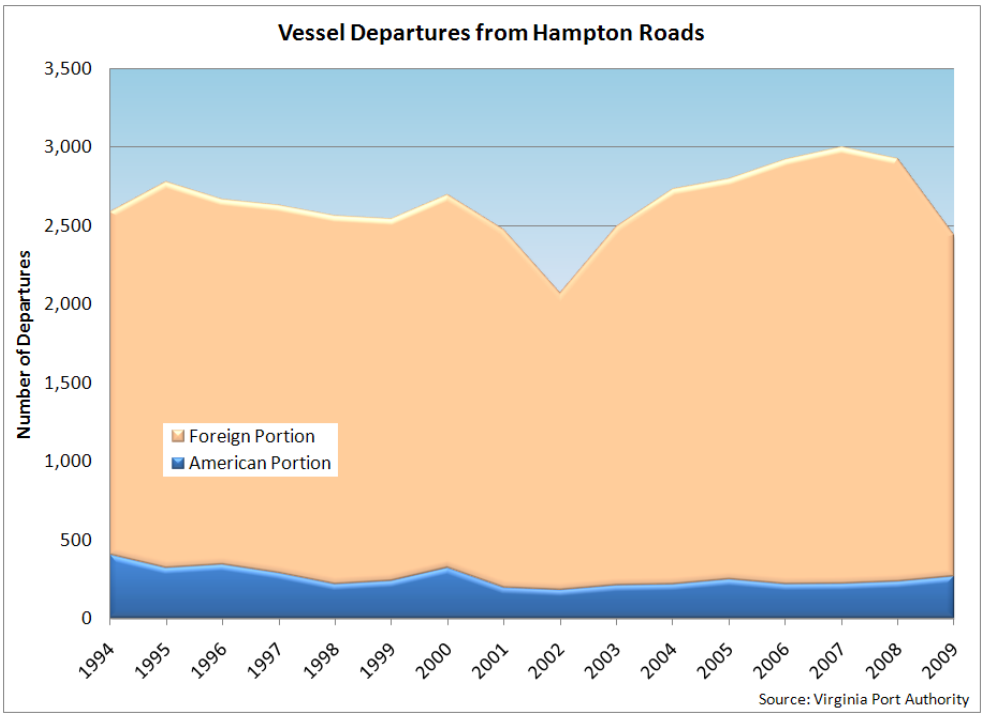
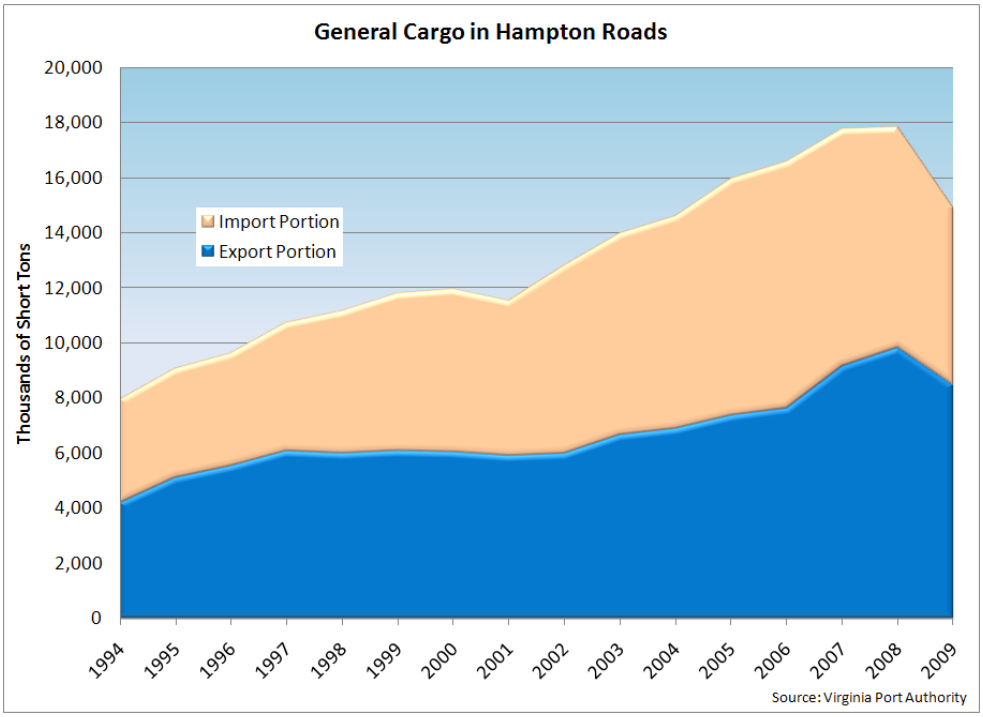


FIGURE 2.11 GENERAL CARGO IMPORTS & EXPORTS



Why is it important:
General cargo includes both containerized and break-bulk cargo. The ability to attract and manage general cargo is vital to the port's future.

How are we doing:
General cargo imports and exports had been steadily increasing in Hampton Roads, but peaked during the second year of the recession and declined significantly between 2008 and 2009.

FIGURE 2.12 COAL LOADINGS

Why is it important:
Coal loadings have remained a major source of Hampton Roads' port traffic, especially during the early nineties.

How are we doing:
The drop in world-wide demand for U.S. coal is evident in the decline in coal loading in Hampton Roads. While there was a brief spike in coal traffic during the recent spike in energy prices, it subsided as energy demand and prices fell.

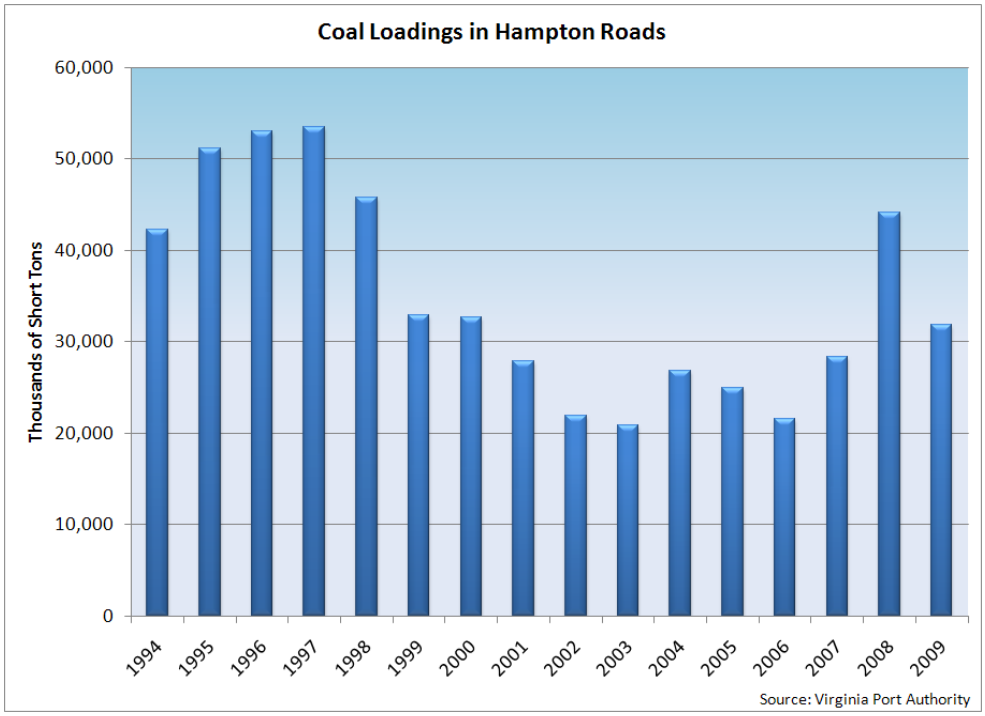
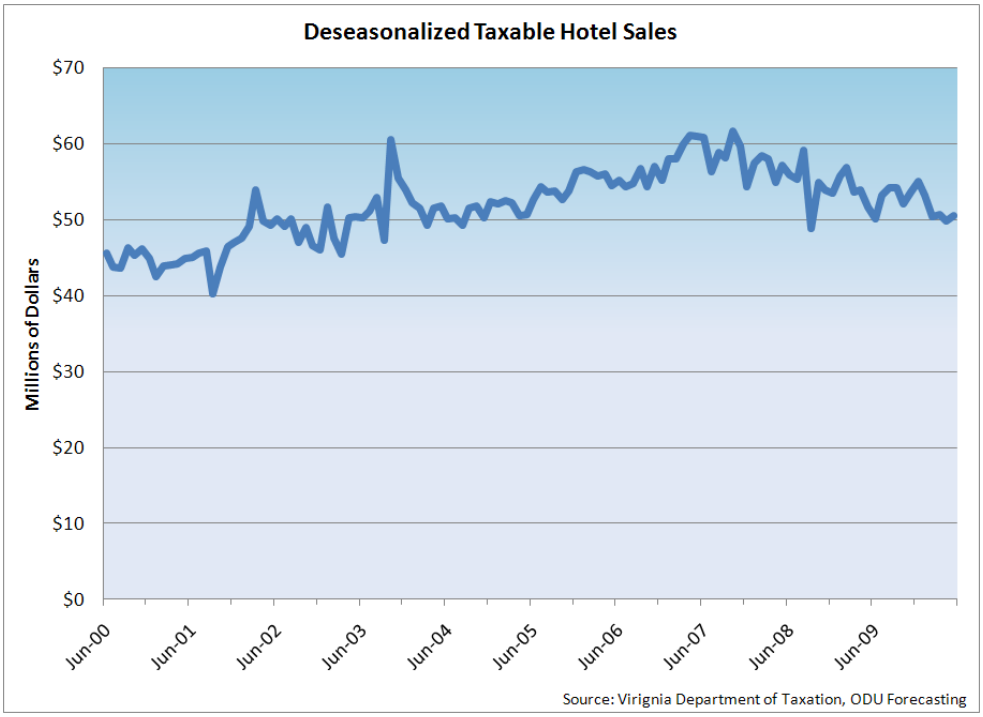


FIGURE 2.13 HAMPTON ROADS DESEASONALIZED TAXABLE HOTEL SALES



Why is it important:
Taxable hotel sales provide a good measure of the number of tourists that vacation in Hampton Roads, providing a consistent source with which to gauge tourist expenditures.

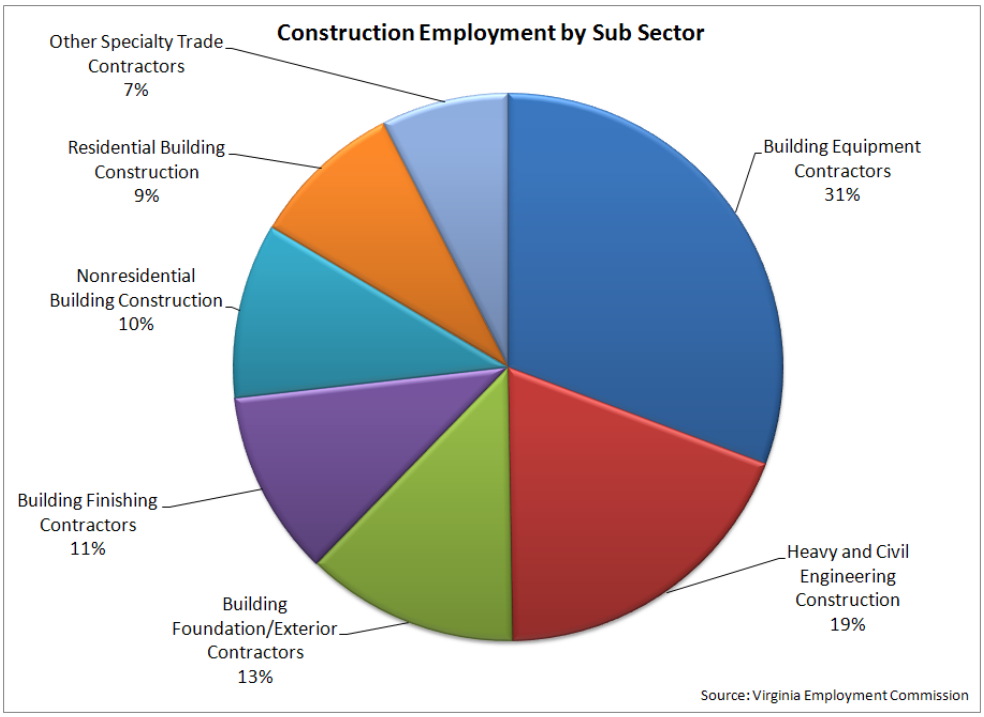
How are we doing:
The tourism industry had been growing steadily for most of the decade as demonstrated by taxable hotel sales, but that growth leveled out in August 2007, presumably because of the slowing economy and increasing fuel prices.

FIGURE 2.14 EMPLOYMENT IN THE HAMPTON ROADS LEISURE AND HOSPITALITY INDUSTRY

Why is it important:
Increases in tourist activity are reflected in the level of employment in the leisure and hospitality industry.

How are we doing:
Employment in the local leisure and hospitality industry had been steadily increasing since 2001, but has begun to decline with the prolonged weakness of the last recession.

FIGURE 2.15 DISTRIBUTION OF HAMPTON ROADS CONSTRUCTION EMPLOYMENT



Why is it important:
The value of construction and construction employment are often used as economic growth indicators. The distribution of construction employment indicates the concentration of various types of construction in Hampton Roads by sub sector.

How are we doing:
The majority of construction employment in Hampton Roads is in various specialty trades, with residential and nonresidential construction having relatively equal distributions in the region.

FIGURE 2.16 NEW BUILDING PERMITS ISSUED IN HAMPTON ROADS

Why is it important:
Building permit information reflects on the general wellbeing of the residential construction industry. Large increases or decreases in the number of building permits have both social and economic implications.

How are we doing:
The number of building permits issued, particularly for single family housing, has fallen precipitously since 2005. This clearly demonstrates the slowing of the residential construction market.

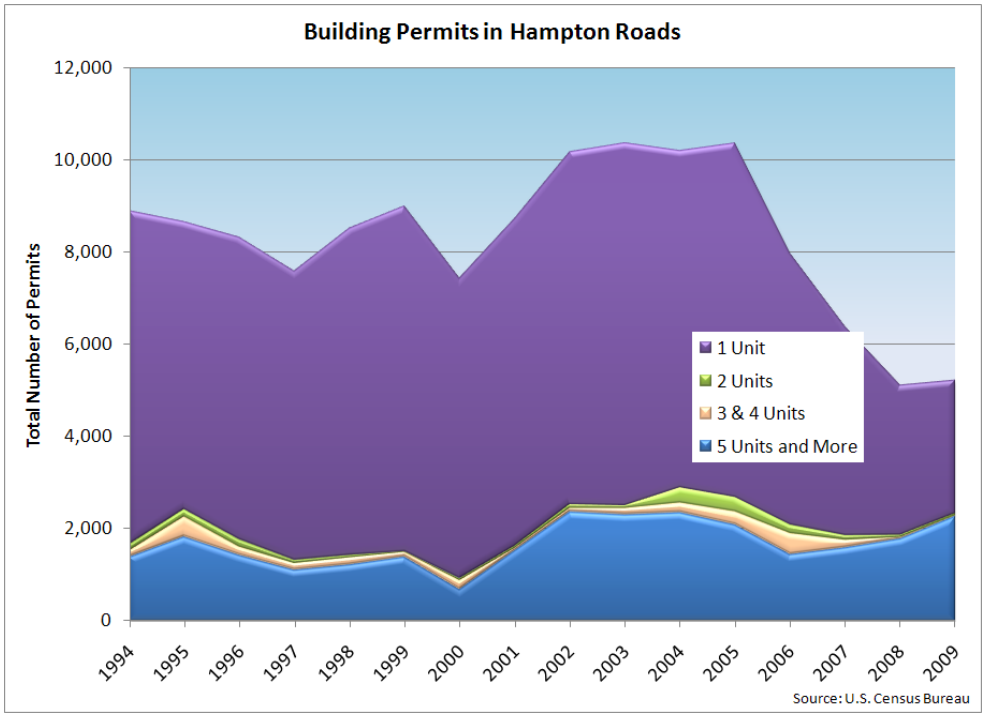
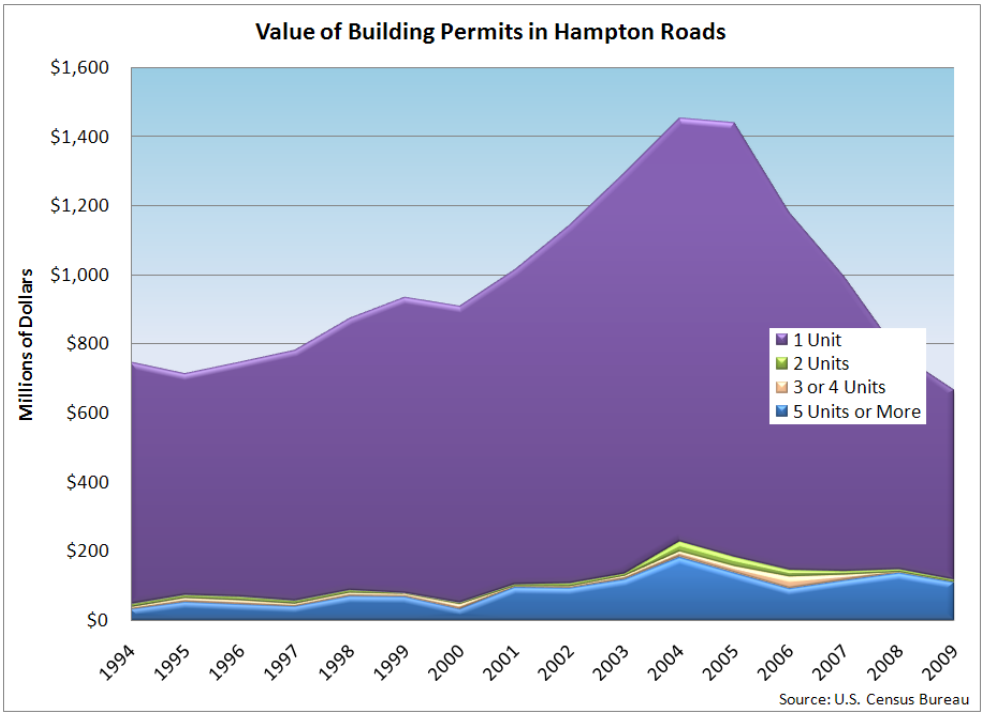


FIGURE 2.17 VALUE OF NEW BUILDING PERMITS ISSUED IN HAMPTON ROADS



Why is it important:
The value of building permits is an excellent indicator of residential construction activity. Both the number and the value of building permits reflect the demand for housing in relation to the price of housing.

How are we doing:
The value of housing permits has fallen since 2005, representing both a drop in the total number of permits and a drop in the value of those permits that are being issued. Much of the increase in permit values in the housing boom was the result of the demand for high end housing.

FIGURE 2.18 CONSTRUCTION EMPLOYMENT IN HAMPTON ROADS

Why is it important:
Construction employment reveals trends in both the commercial and residential construction industries. Increasing construction employment is indicative of a healthy economic climate.

How are we doing:
Despite the increase in permitting activity during the middle of this decade, construction employment did not surge, and this has lead to a smaller then expected decline in construction employment despite the housing correction.

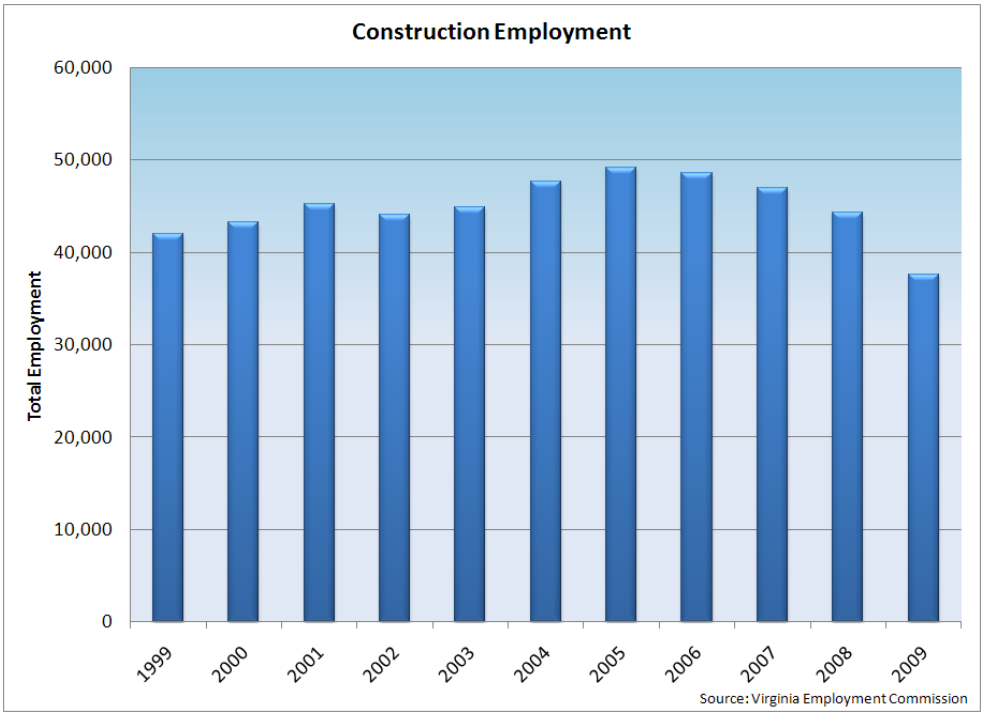
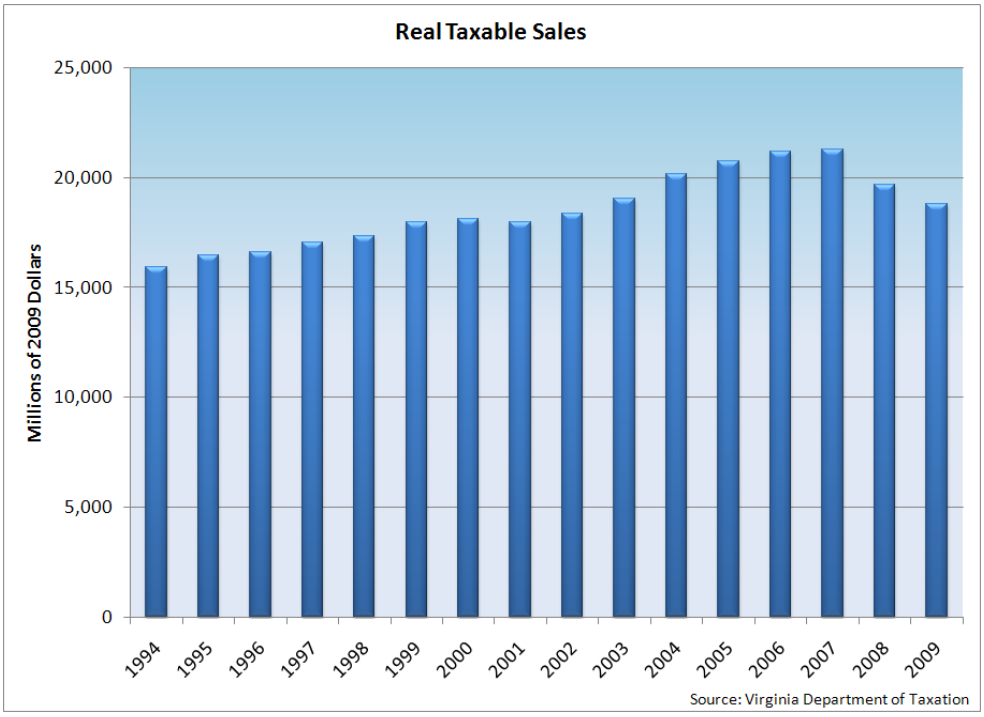


FIGURE 2.19 INFLATION ADJUSTED TAXABLE SALES IN HAMPTON ROADS



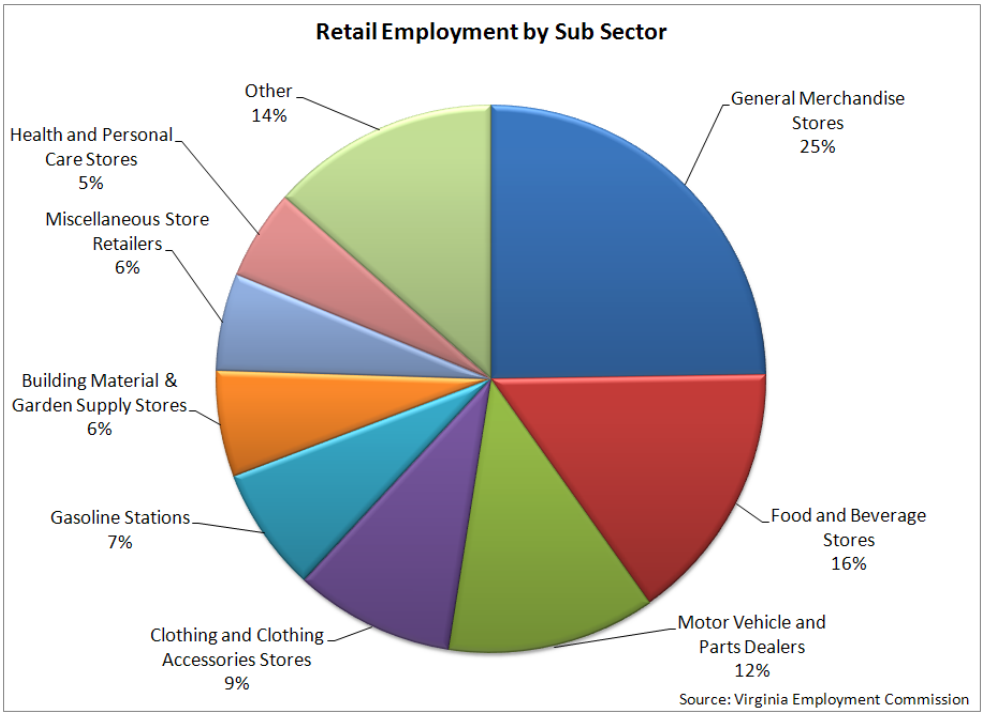
Why is it important:
Retail trade is Hampton Roads' second largest industry. Trends in taxable sales exhibit the interaction between consumer expenditures and the retail trade industry. Strong retail sales imply that consumer confidence is high and that there is a healthy market for retail trade.

How are we doing:
Taxable sales declined for the second year in a row on the back of the recession, and are now back to 2003 levels. This will reduce state and local, revenue for the near term.

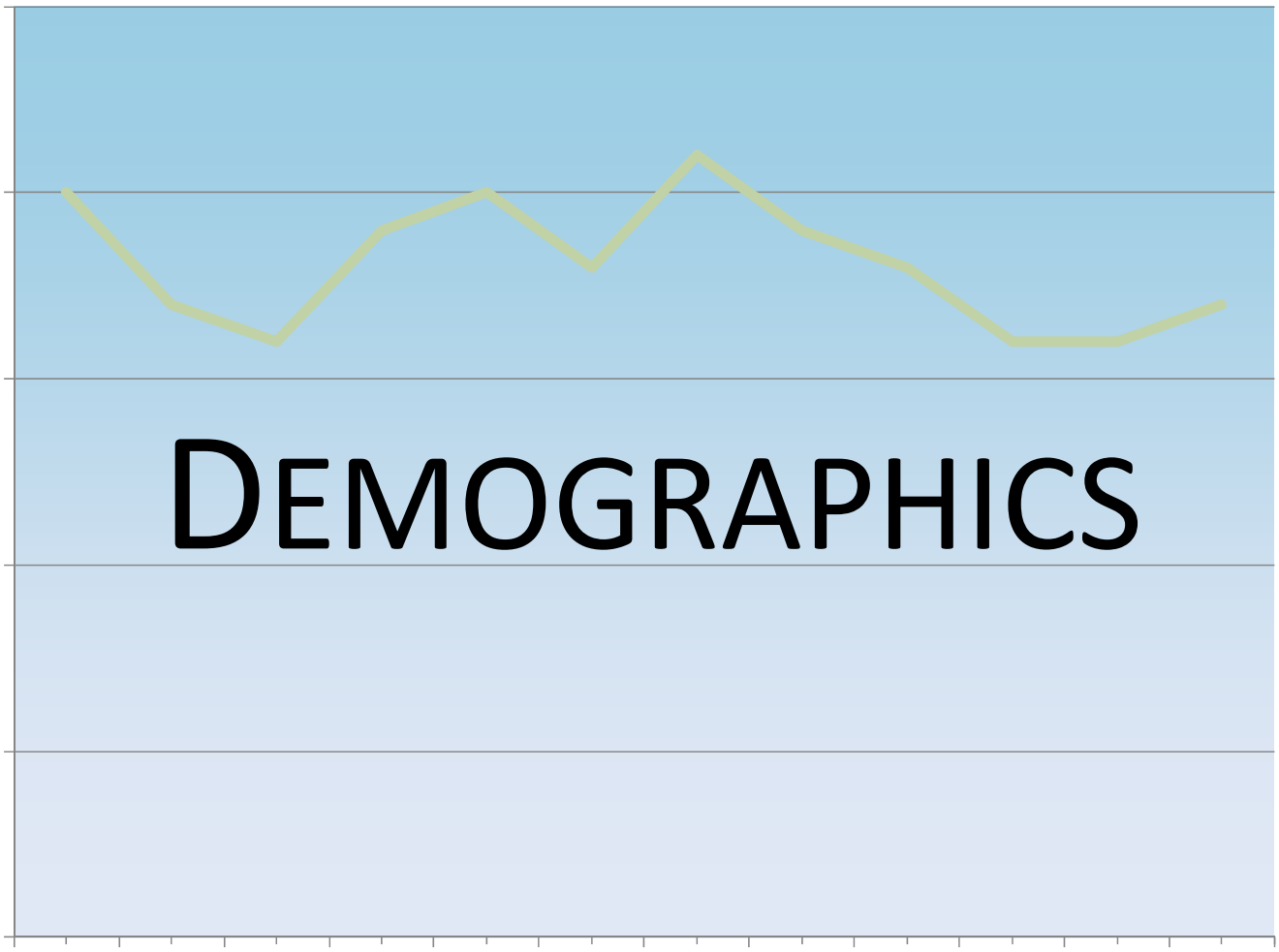
FIGURE 2.20 DISTRIBUTION OF HAMPTON ROADS RETAIL EMPLOYMENT

Why is it important:
The retail sector consists of a variety of sub sectors each of which are subject to unique market forces. In order to appreciate how market changes might affect the retail industry, it is important to understand the composition of the retail industry.

How are we doing:
General merchandise and food & beverage stores account for the majority of the retail industry in Hampton Roads. The remainder is comprised of a diverse grouping of smaller sub sectors.



SECTION III



The Demographics section of this report includes charts on population, population growth, population density, births, deaths, age & gender distributions, race & ethnicity, and occupations.

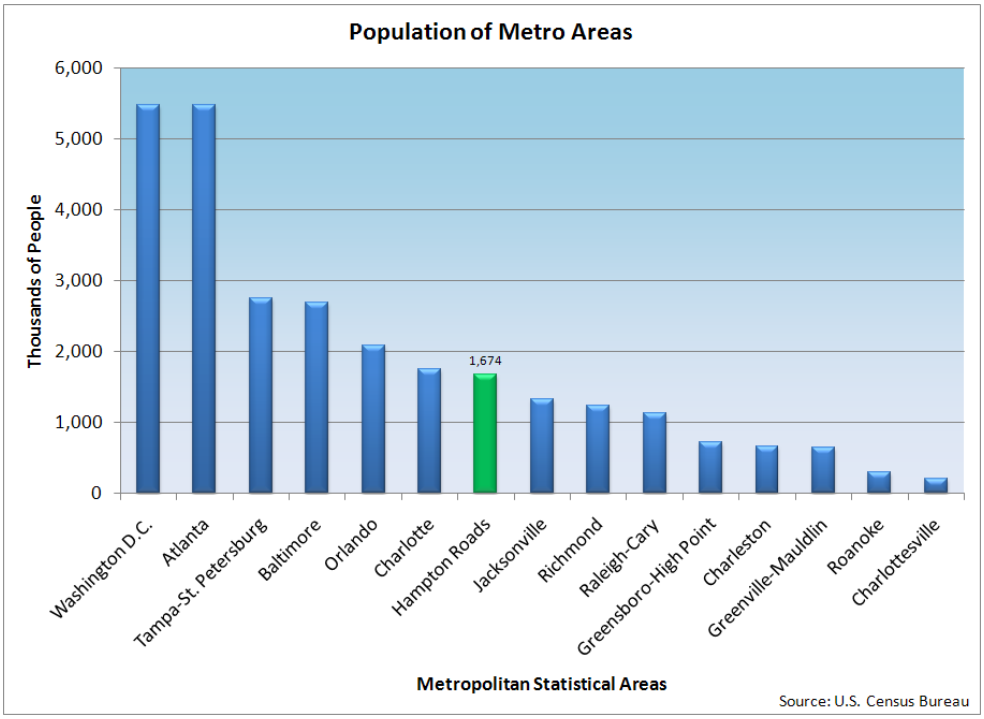
Demographics

Hampton Roads was the 36th largest region in the U.S. in terms of population in 2009, but has been growing at a significantly slower rate than the nation for quite some time. The slow population growth is partially related to out-migration, as the region has had strong natural population growth (births – deaths) for over two decades. There has not been sufficient research to determine the cause of out-migration in Hampton Roads, though there is strong evidence to suggest that migration patterns are closely tied to economic opportunity.

The population has aged slightly over the last few years, as the only population category that has continued to grow throughout the decade consists of the cohort of 65 and older. The age cohort under nineteen is now below its previous high from the middle part of the decade, and the same is true of the working age population (20-64).

Regionally, the number of females in Hampton Roads continues to be greater than the number of males by 4.4% over the past five years. During the past fifteen years, the African American population had grown strongly, leveling off over the past five years. Recent data suggests that population growth has been relatively proportionate across all demographics.

FIGURE 3.1 POPULATION OF HAMPTON ROADS AND COMPETING METRO AREAS IN 2009



Why is it important:
Population provides a context for understanding many economic and social indicators.

How are we doing:
With a population of 1.674M in 2009, Hampton Roads was the 36th most populated metropolitan statistical area in the United States. While Washington and Atlanta are much bigger, Hampton Roads population level is average for Southeastern metro areas.

FIGURE 3.2 POPULATION GROWTH RATES IN HAMPTON ROADS AND THE UNITED STATES

Why is it important:
Population growth tracks closely with other expressions of economic growth. Changes in population can have very significant impacts on employment and income statistics.

How are we doing:
By its nature, regional population growth has a significantly higher level of volatility then the nation. Hampton Roads' population has grown at a slower rate than the nation for 14 out of the last 15 years.

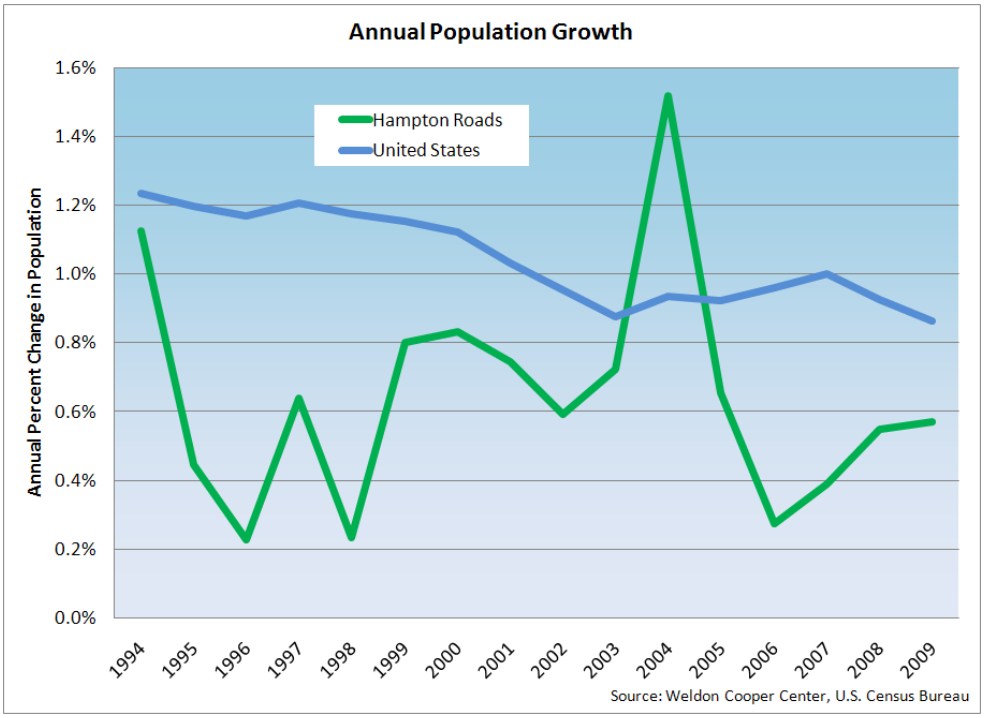
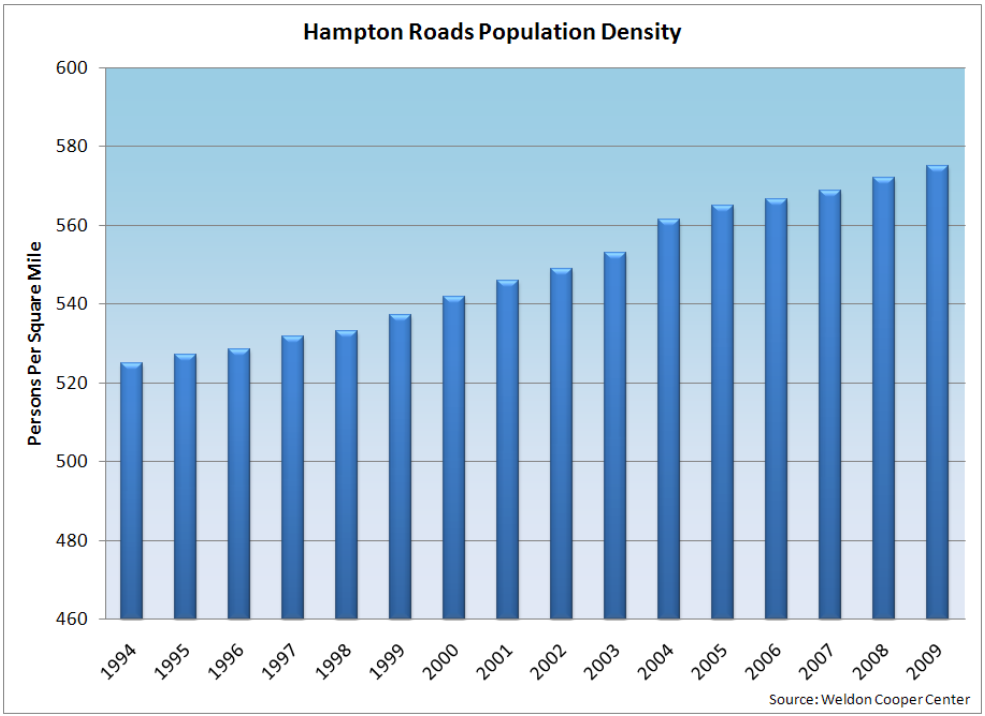


FIGURE 3.3 HAMPTON ROADS POPULATION DENSITY



Why is it important:
Population density directly impacts the usage of government services in the region. (Note, this graph does not start at 0).

How are we doing:
Population density in the region has grown at the same measured rate as overall population growth.

FIGURE 3.4 COMPONENTS OF POPULATION CHANGE IN HAMPTON ROADS

Why is it important:
Changes in regional population are due to births, deaths, and migration. Reviewing the components of population provides a clearer picture as to changes in a region's demographics.

How are we doing:
There was significant net out migration during the second half of the nineties, but there has been a high level of volatility in net migration in the new millennium with little cumulative impact on the total population level.

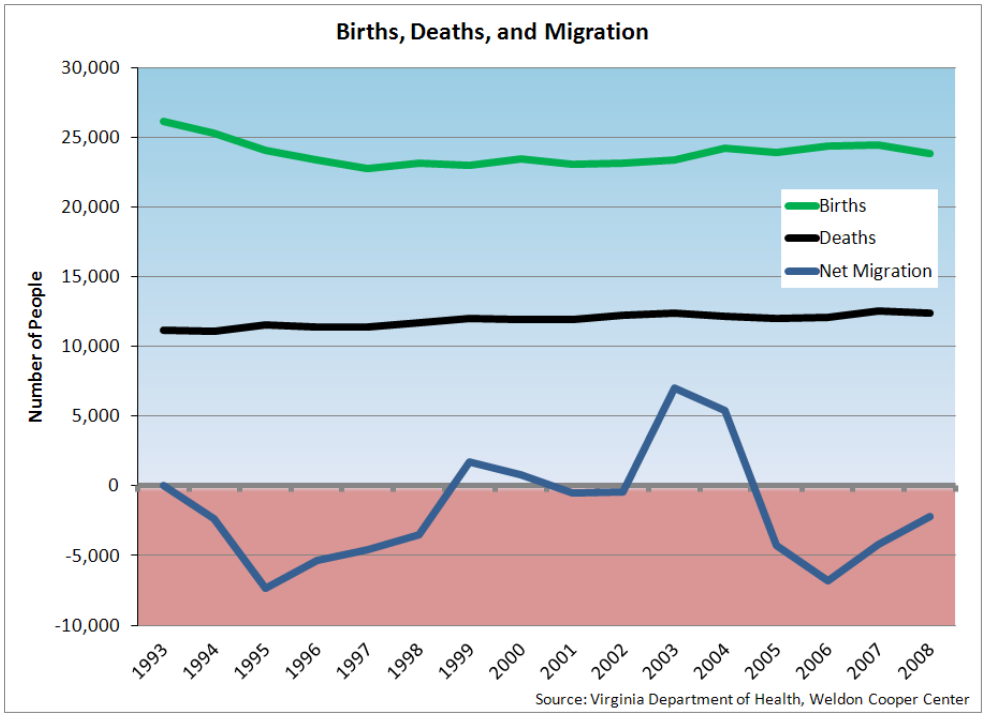
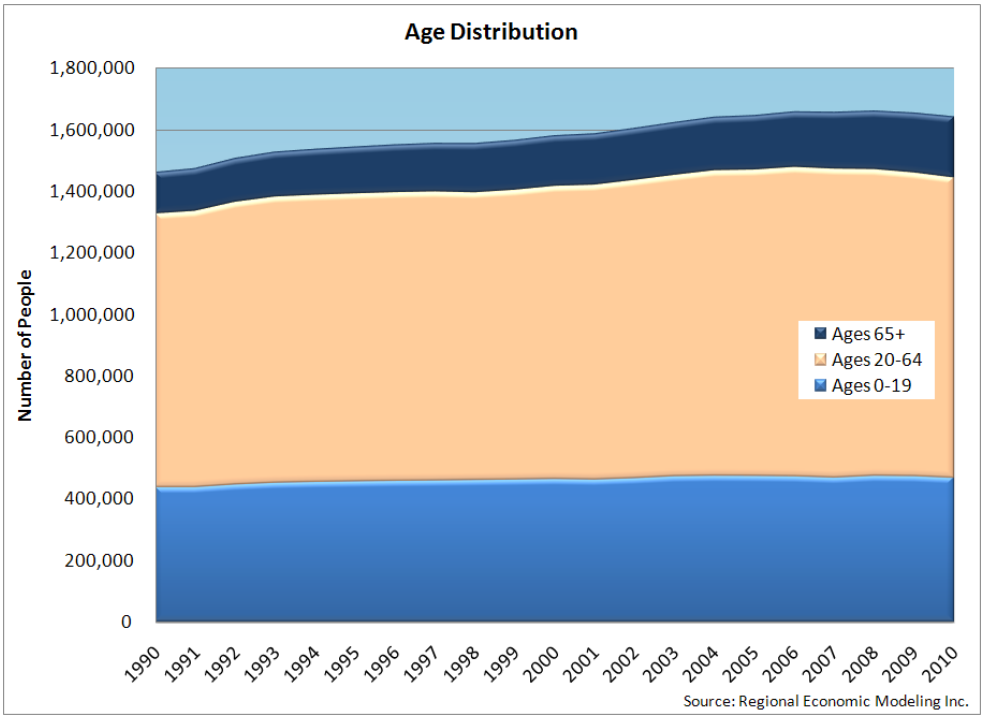


FIGURE 3.5 AGE DISTRIBUTION OF THE HAMPTON ROADS POPULATION



Why is it important:
The age distribution of a region has both social and economic implications. It provides insight into the need for family and senior services, as well as indicating the availability of labor.

How are we doing:
The age distribution has remained stable in the region. The 65+ group is expected to start expanding rapidly as the baby boomers continue to age.

FIGURE 3.6 GENDER DISTRIBUTION FOR THE HAMPTON ROADS POPULATION

Why is it important:
Men and women require distinctive services, tend to pursue different occupations, and impact the social and economic landscape in a unique manner.

How are we doing:
Since 1992, the number of women in Hampton Roads has surpassed the number of men. Females in Hampton Roads now outnumber males by a substantial margin.

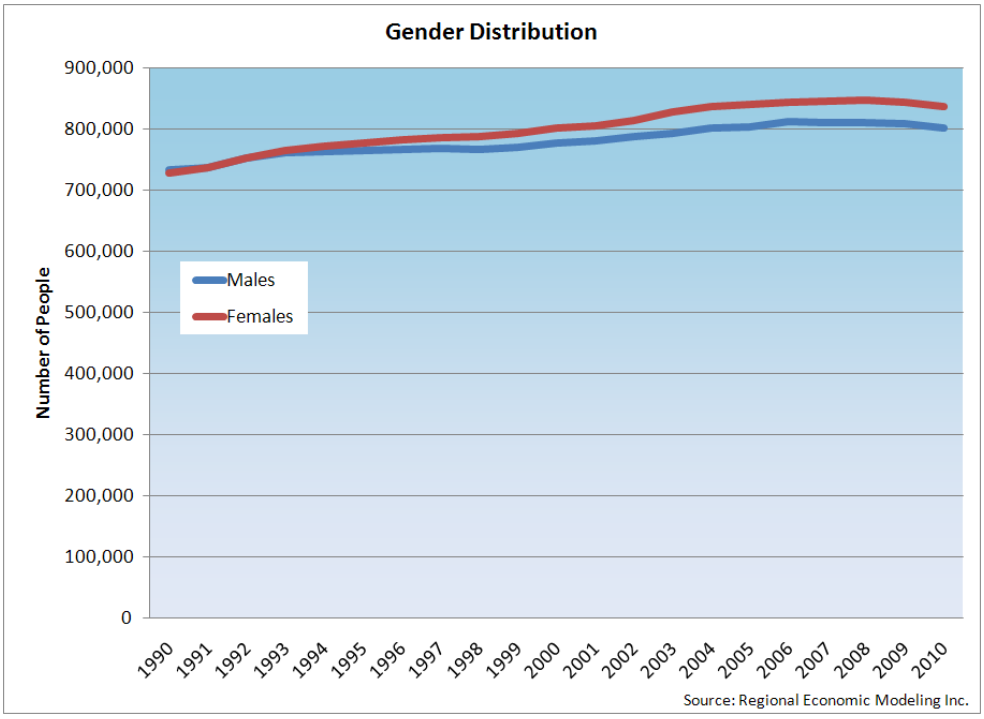
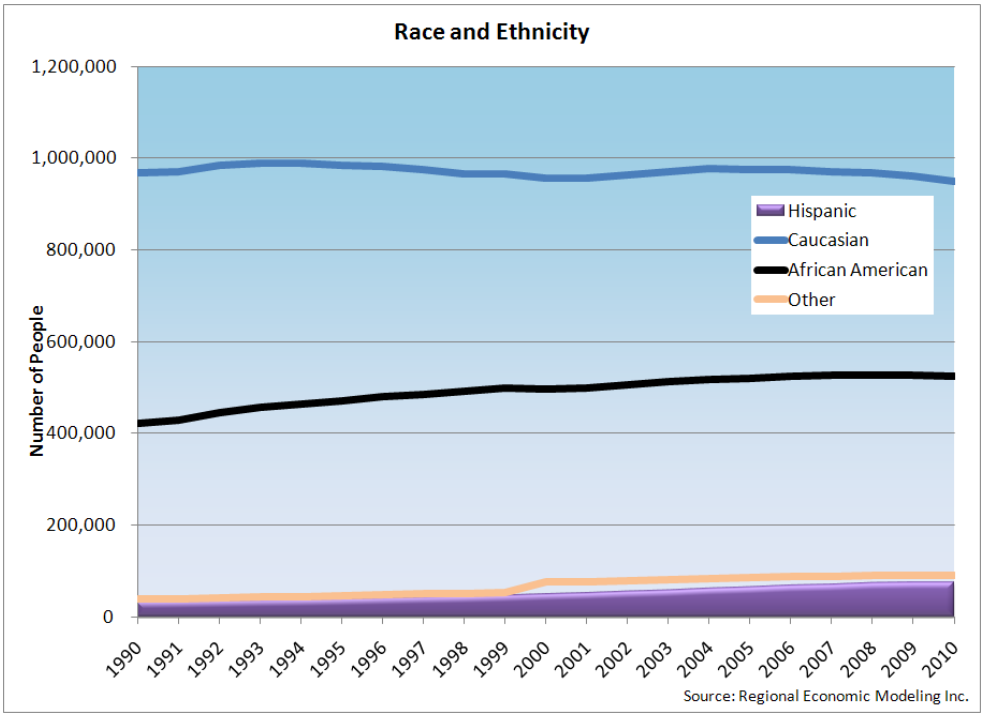


FIGURE 3.7 RACE AND ETHNICITY IN HAMPTON ROADS



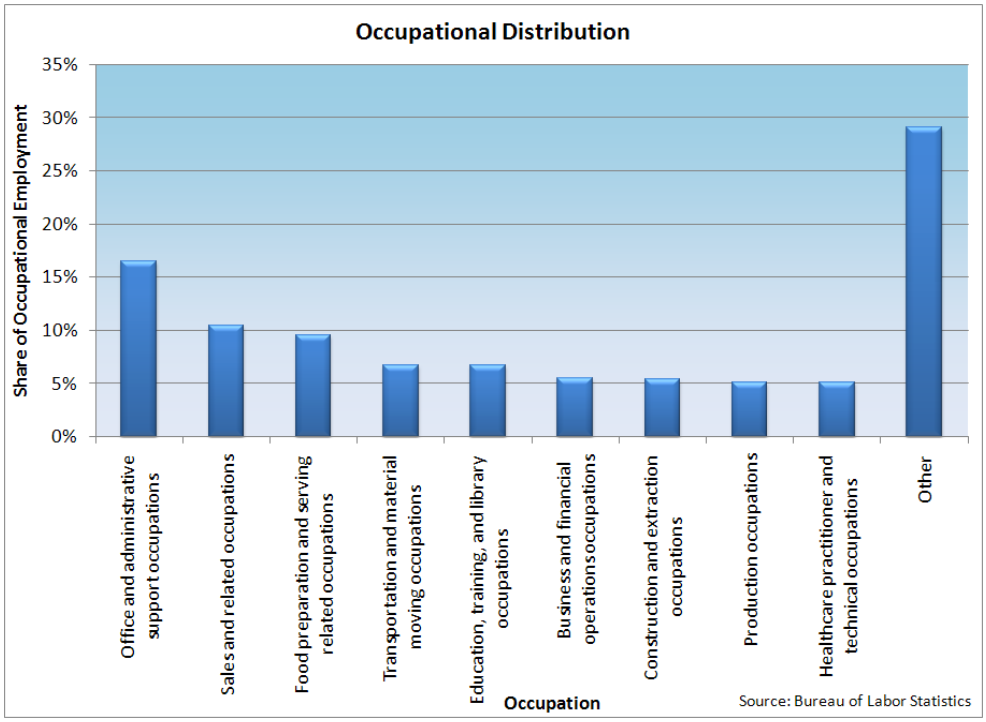
Why is it important:
Understanding racial and ethnic diversity is important in order to ensure equal opportunities for all persons. One should employ localized diversity statistics when evaluating regional employment trends.

How are we doing:
Hampton Roads has an above average portion of African Americans when compared to other MSAs. Conversely, Hampton Roads population has relatively few other minorities or persons of Hispanic ethnicity.

FIGURE 3.8 DISTRIBUTION OF OCCUPATIONS IN HAMPTON ROADS

Why is it important:
Employment is often classified by industry, although persons seeking employment typically search by occupation. Figure 2.8 illustrates the occupational and skills distribution of persons working in Hampton Roads.

How are we doing:
Roughly 16.5% of workers in Hampton Roads are employed in office and administrative support occupations. Sales and food related occupations round out the top three occupational categories.



SECTION IV

The Housing section of this report includes information on home sales, housing prices, home ownership rates, and housing affordability.

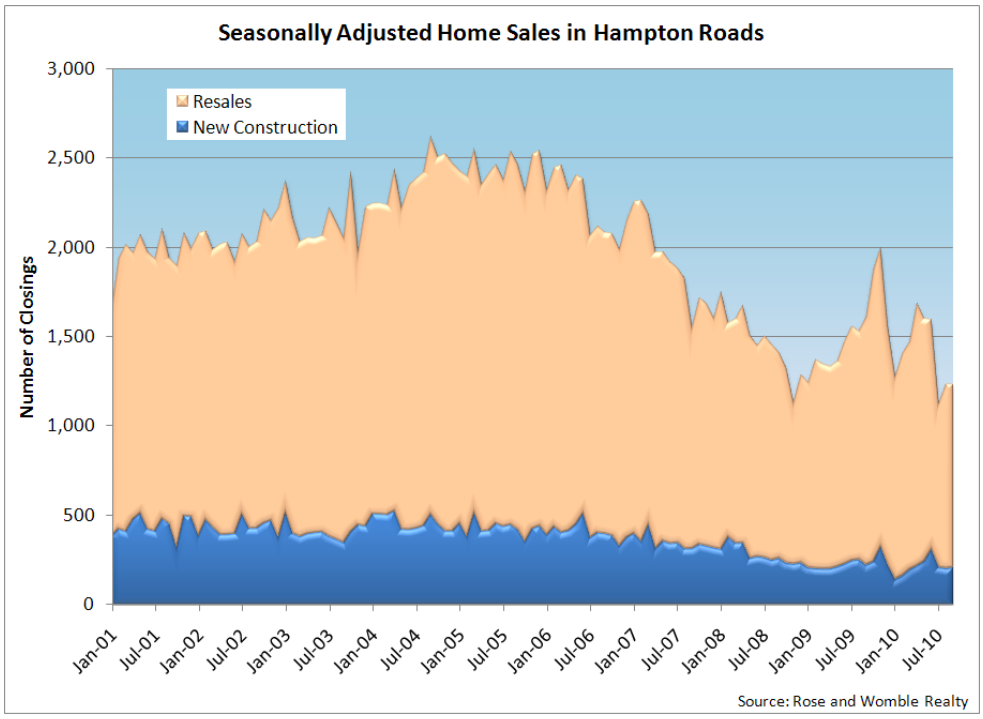
Housing

Construction and the housing market play a large role in the quality of life in a community. Housing traditionally plays a major role bringing the nation and region out of recessions, as new home sales and the re-sale of existing homes contribute to spending on residential fixed investment and other home purchases such as furnishings. A healthy housing market would see home sales continue at historic rates, with small adjustments for demographic changes in the regional population. Too few home sales indicate that the housing market cannot achieve equilibrium as a result of either limited access to credit or market prices that have not been established by buyers and sellers. Home re-sales have been almost 16% below the long term average, and 33% below the average sales during the peak over the past year. This includes the elevated number of closings in April, May, and June as a result of the home buyer's tax credit.

The lower sales in the region suggest that there continues to be uncertainty about the economy, but also that the home prices in the region have failed to fully adjust for the massive increases seen in figure 4.2. The home price index shows how quickly home prices have changed for the same quality of home (controlling for 'house' inflation in home prices), and it appears that there still exists room for home prices to decline further. Home values are still up 90% over the past decade, compared to a modest 26% during the nineties.

Homeownership rates in the region have been declining since 2003, and this relates both to the expense of homes during the housing bubble as well as the changing perspective in American's view of home ownership since price adjustments first started in the housing market. The housing affordability index has been increasing since 2006 as a result of both historically low interest rates and recent declines in house prices.

FIGURE 4.1 PRE-OWNED AND NEW CONSTRUCTION HOME SALES IN HAMPTON ROADS



Why is it important:
Regional home sales react to both local and national market pressures. Increasing new construction sales often point to increasing population, while increases in housing resales can be attributed to a variety of factors, including economic growth.

How are we doing:
The region had seen a steady decline in existing home sales since July 2005, driven at first by a combination of increased mortgage rates and higher home prices. Existing home sales have started rising, but it is unclear what role foreclosures play in the increased level of sales in the region.

FIGURE 4.2 HOUSING PRICE INDICES FOR HAMPTON ROADS, VIRGINIA, AND THE UNITED STATES

Why is it important:
The cost of mortgages or renting represent the single largest expense for the majority of American households. As a result, increases in the price of housing are directly correlated with increases in the cost of living.

How are we doing:
Housing prices spiked in Hampton Roads between 2000 and 2006, increasing to an even greater extent than US housing prices. They have since subsided and entered a period of price declines not realized since the early nineties.

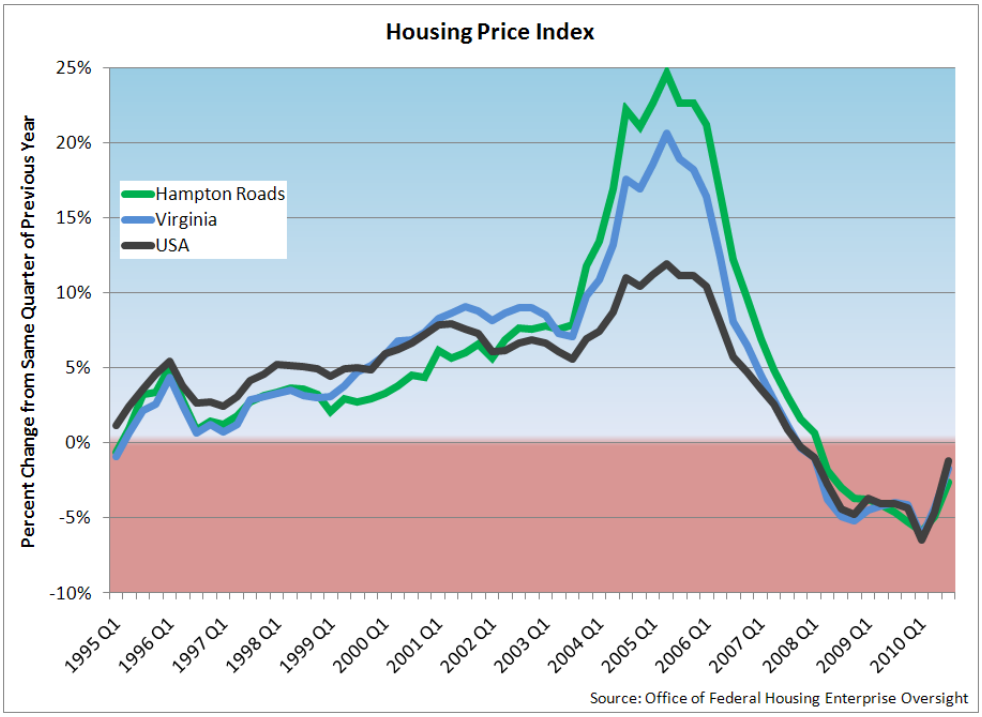
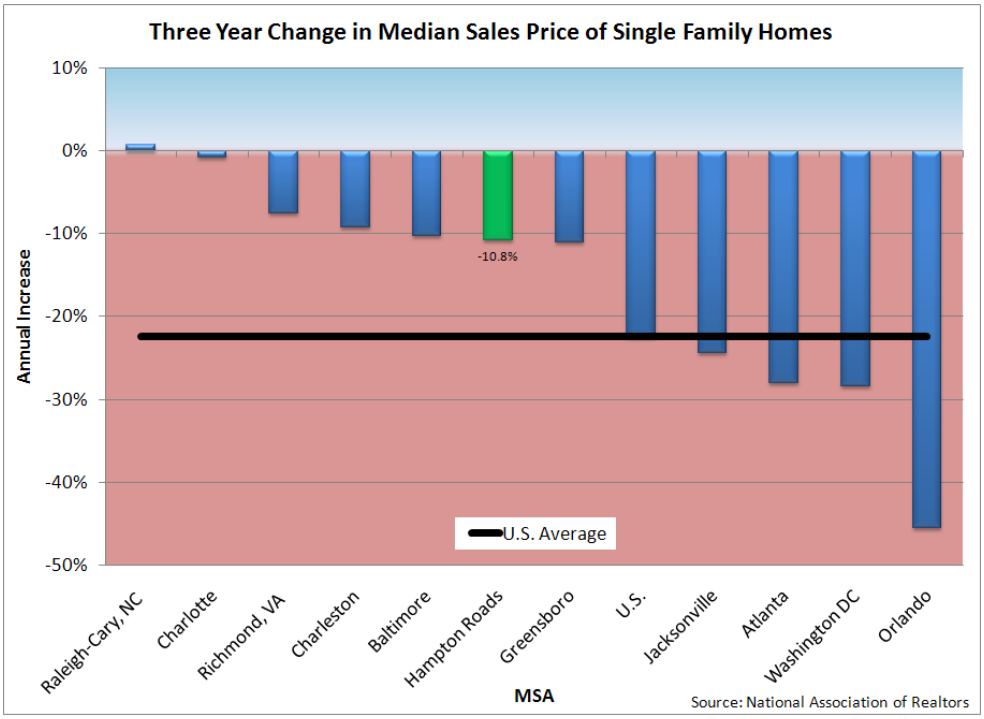


FIGURE 4.3 HOUSING PRICE INCREASES IN HAMPTON ROADS AND COMPETING METRO AREAS FROM 2006 TO 2009



Why is it important:
Housing is a major component of the cost of living, affecting how the Hampton Roads region can compete for employment with other metro areas. Also, real property taxes are important part of local government finances, and changes in home values can impact the level of services that a locality can provide.

How are we doing:
Hampton Roads continued to experience a decline in the median value of home sales in 2009, but homes have still appreciated in the region when evaluated over longer time horizons.

FIGURE 4.4 HOME OWNERSHIP RATES IN HAMPTON ROADS

Why is it important:
As is so often stated by the Department of Housing and Urban Development, homeownership is part of the American Dream. Increased home ownership builds wealth and creates stable communities.

How are we doing:
Due in part to changes in military housing, home ownership rates in Hampton Roads increased until 2003. The appreciation of housing prices between 2003 and 2006, and the subsequent recession has reduced affordability returning many to the rental market.

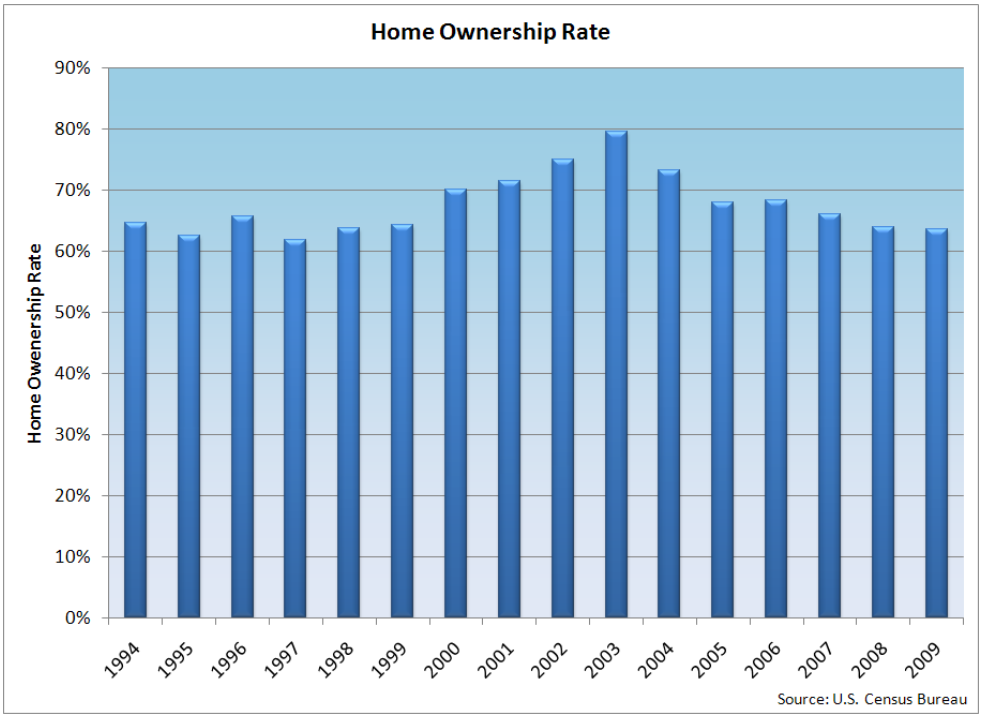
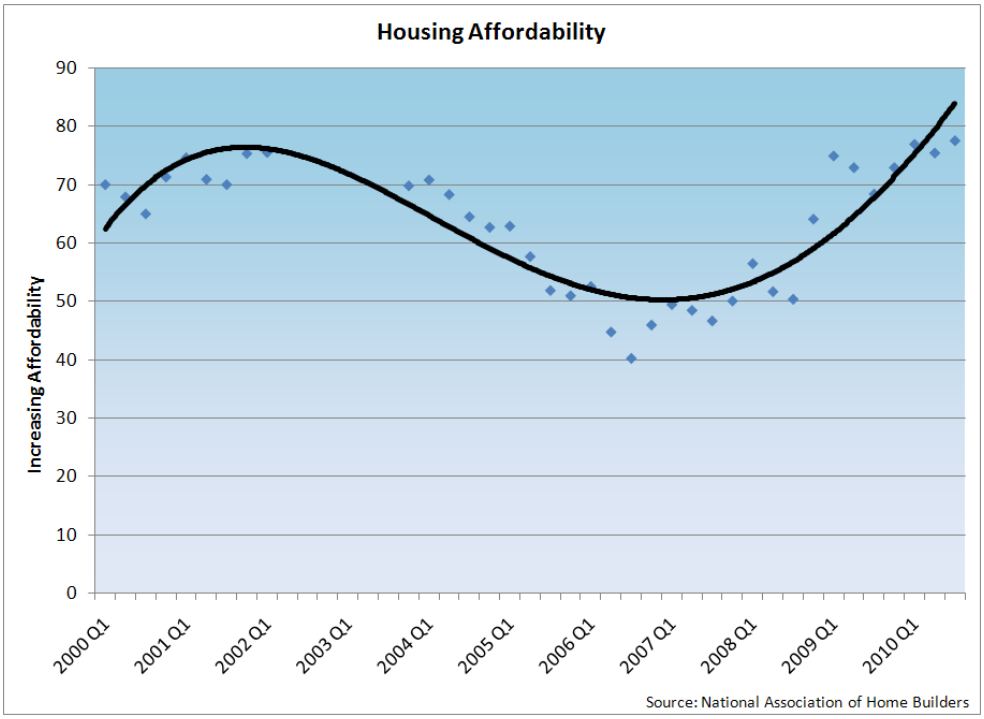


FIGURE 4.5 HAMPTON ROADS HOUSING OPPORTUNITY INDEX



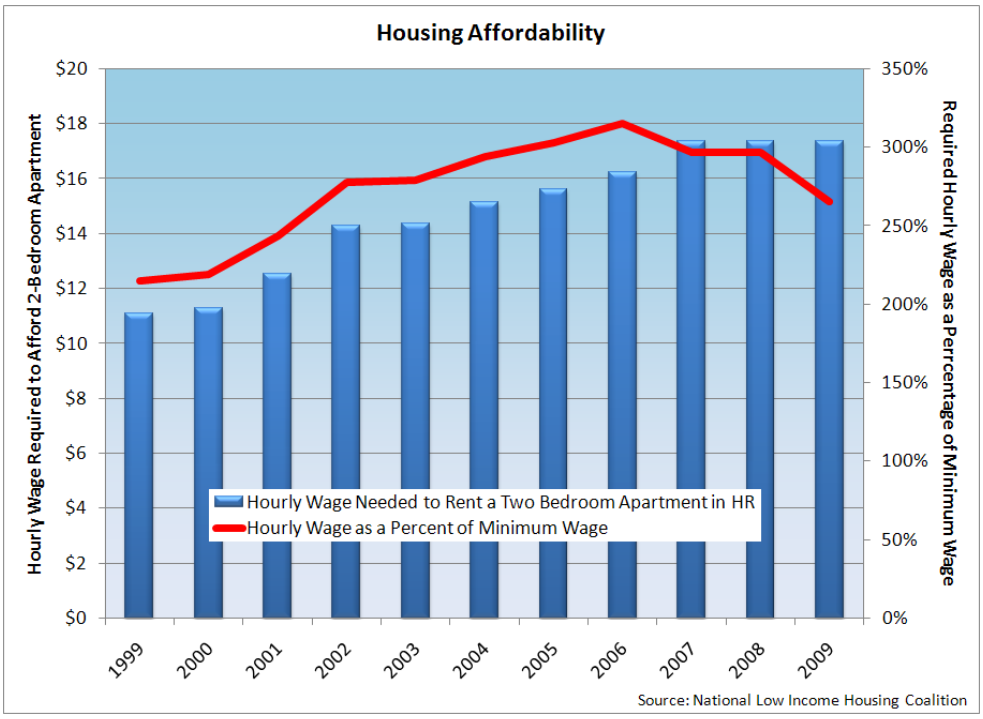
Why is it important:
The ability to purchase housing improves the quality of life by offering individuals the opportunity to take advantage of the benefits associated with homeownership.

How are we doing:
Housing became less affordable as housing prices increased during the boom, but as a result of both the market correction and low interest rates, affordability is increasing.

FIGURE 4.6 HOUSING AFFORDABILITY IN HAMPTON ROADS

Why is it important:
The availability of affordable housing ensures housing opportunities for persons of all income levels. Access to affordable housing reduces homelessness and assists in workforce recruitment. The affordability of a 2-bedroom apartment rental is an industry standard in determining affordability.

How are we doing:
As housing values increased in Hampton Roads, housing affordability decreased through 2007. Increases in the minimum wage have helped to increased relative affordability, though rental rates remain elevated.



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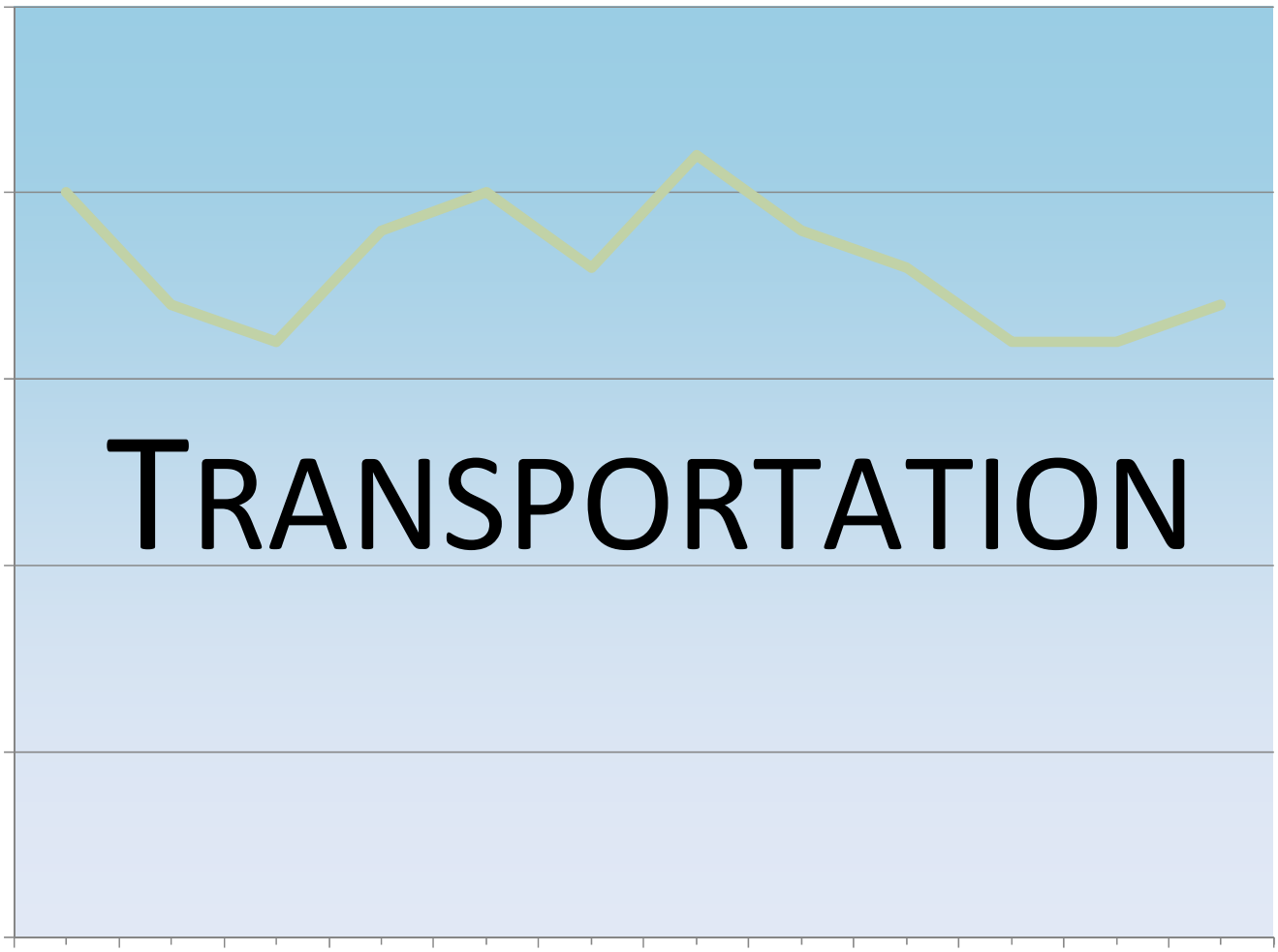
SECTION V



The transportation section of this report includes information on vehicle miles traveled, congestion, traffic crashes, transit usage, and air travel.

Transportation

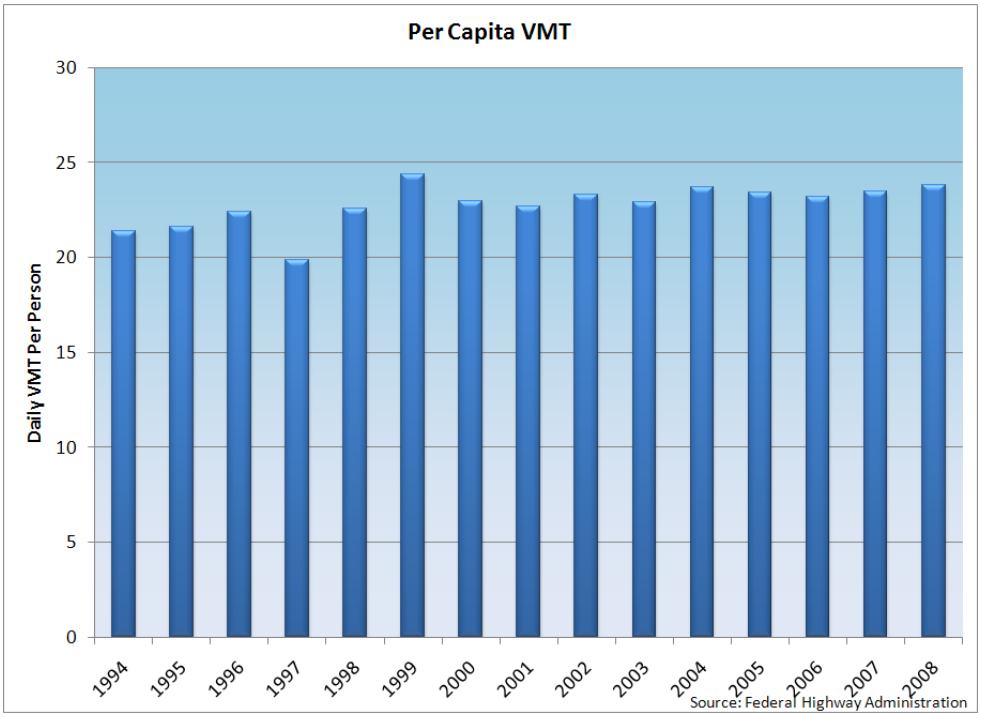
The transportation network in Hampton Roads has garnered considerable attention as aging infrastructure and traffic congestion are closely tied to the economy and to quality of life within the region. The recent downturn in the economy has affected many aspects of the Hampton Roads transportation system, with growth in roadway travel coming to a halt, less usage of public transportation, and a decrease in air travel from Hampton Roads airports.

Over the last decade, Hampton Roads has experienced relatively little growth in terms of per capita vehicle miles traveled. In addition, the region also has a lower level of vehicle miles traveled per capita and a lower mean travel time to work than most of the other competitor regions.

Despite a lower amount of travel per capita in Hampton Roads than in the competitor regions, congestion is definitely an issue in the region, particularly at the notorious bridges and tunnels. According to Inrix, among competitor regions only Washington, DC had a higher Travel Time Tax (which measures the extra amount of time trips take in each region during congested peak travel periods) than Hampton Roads did in 2009.

Public transportation continues to play a small role in the region when compared to some other areas of similar size due in part to low population density. Norfolk is currently building the region's first light rail line and Virginia Beach is taking the initial steps in terms of planning for an extension to the oceanfront. Light rail has the capacity to impact future land use decisions and encourage increased density in development.

FIGURE 5.1 PER CAPITA DAILY VEHICLE MILES TRAVELED IN HAMPTON ROADS



Why is it important:
Per capita vehicle miles traveled (VMT) is the industry standard in determining the amount of travel generated per person. Increased sprawl, higher employment to population ratios, and low usage of alternative modes of transportation can put upward pressure on a region's per capita VMT.

How are we doing:
Hampton Roads' per capita VMT remained relatively constant over the past several years despite changes in commuting and land development patterns.

FIGURE 5.2 PER CAPITA DAILY VEHICLE MILES TRAVELED IN HAMPTON ROADS AND COMPETING METRO AREAS

Why is it important:
Traffic patterns and congestion have a bearing on regional competitiveness and quality of life. Per capita VMT is a reflection of a region's commuting distance, density, and usage of alternative transportation modes.

How are we doing:
Per capita VMT in Hampton Roads is relatively low when compared to other regions, suggesting that regional commuting distances are shorter than in other competitor regions.

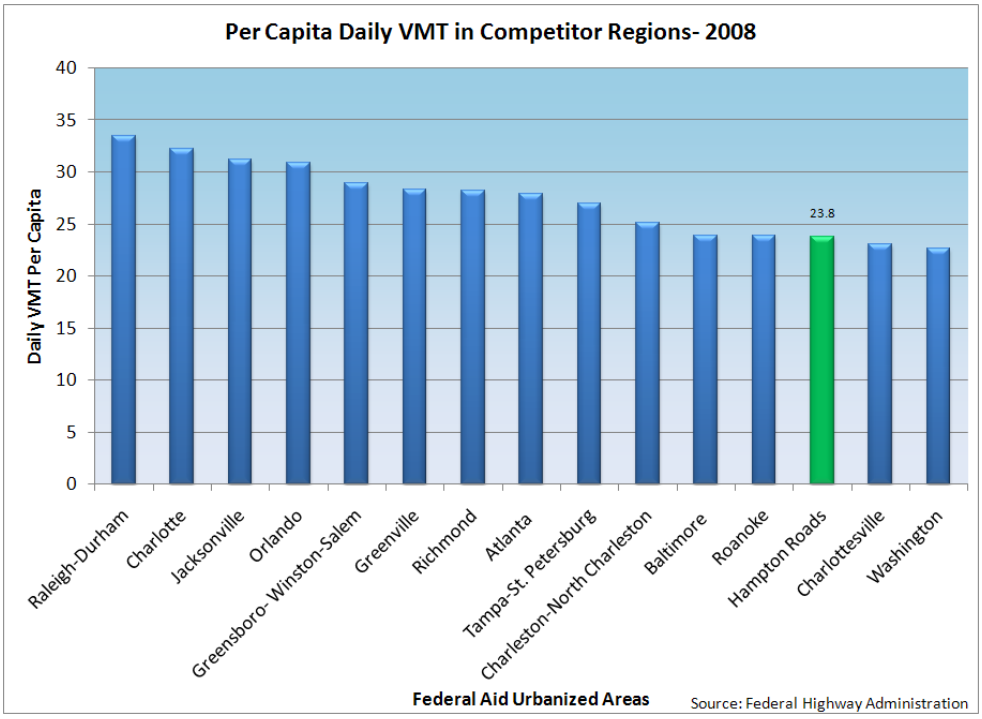
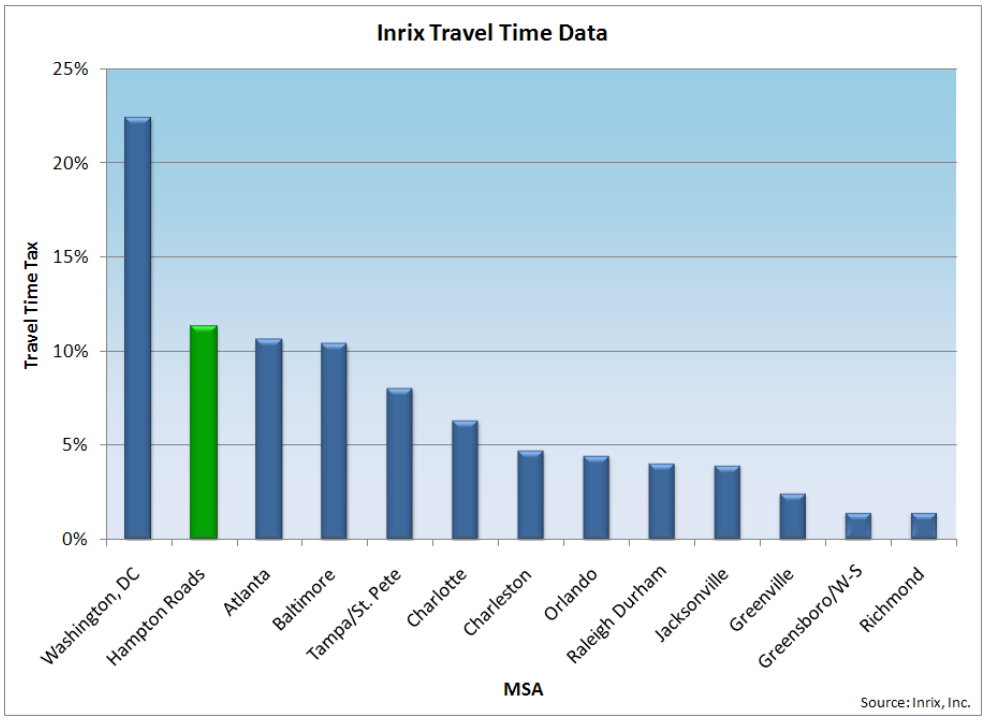


FIGURE 5.3 INRIX TRAVEL TIME TAX FOR HAMPTON ROADS AND COMPETING METROS, 2009



Why is it important:
Inrix, Inc. uses a Travel Time Tax to compare congestion in MSAs during peak travel periods. It calculates the extra travel time a trip takes during peak travel periods compared to uncongested conditions.

How are we doing:
Hampton Roads performs worse on this metric then on other measures of travel time delay, and this is related to the severity of congestion at bottlenecks in this region.

FIGURE 5.4 DELAY PER PEAK PERIOD TRAVELER IN HAMPTON ROADS

Why is it important:
While VMT refers to the distance traveled, annual hours of delay reflects the degree of congestion. Figure 5.3 illustrates how local congestion compares with congestion in competing metro areas.

How are we doing:
Hampton Roads' congestion problems appear to compare favorably with other competing metro areas. The methodology used to determine delay, however, fails to take into account the additional congestion that occurs at the bridges, tunnels, and bottlenecks that are unique to this region.

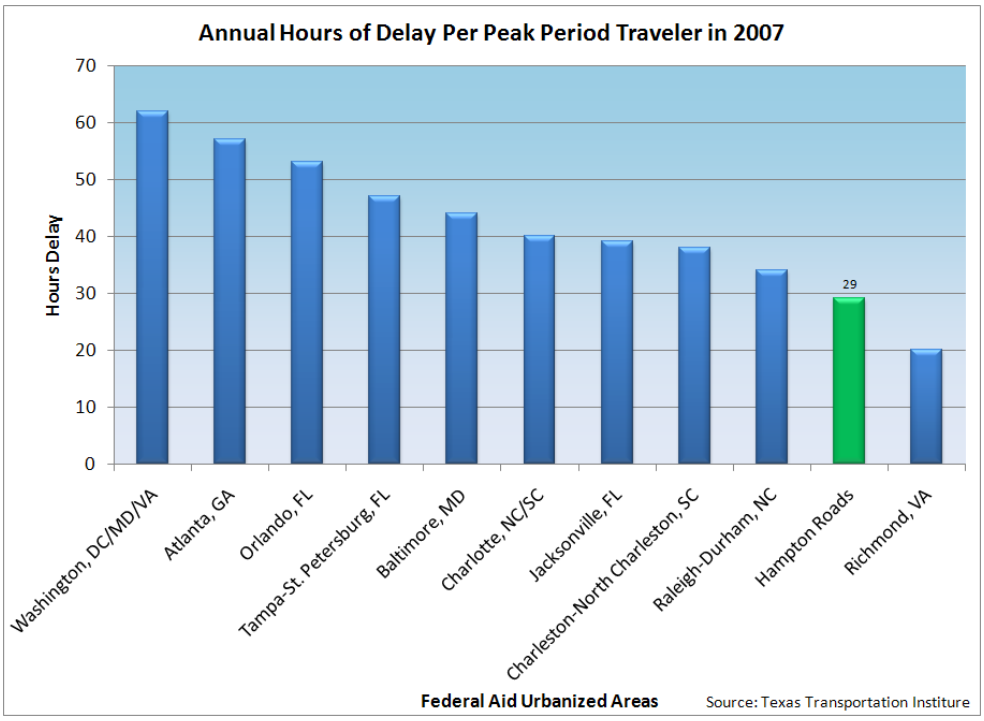
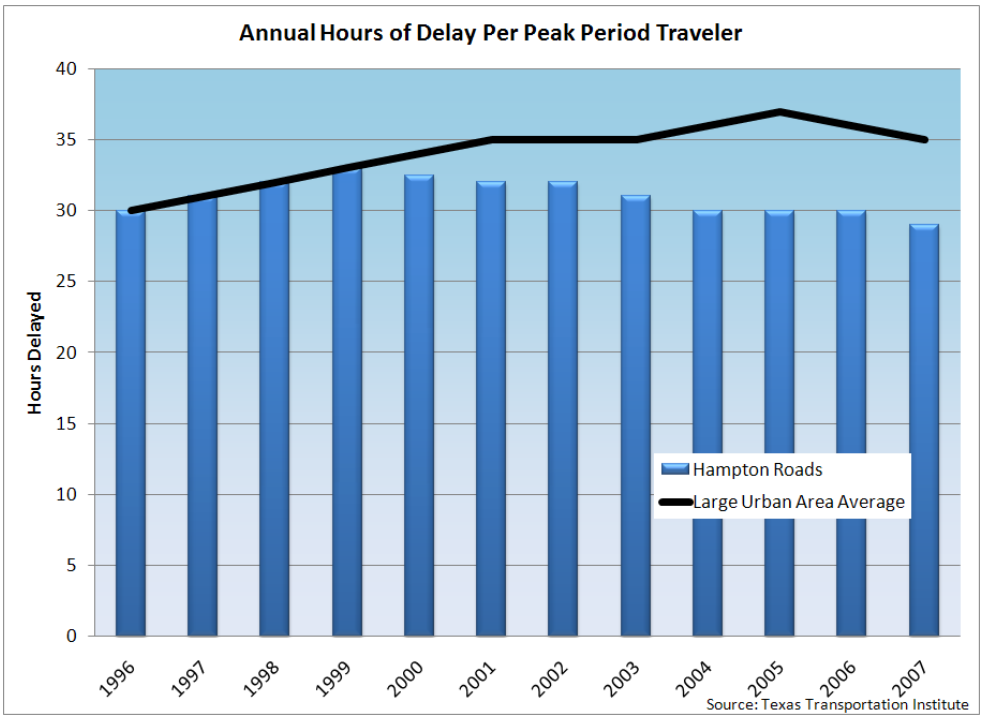


FIGURE 5.5 DELAY PER PEAK PERIOD TRAVELER IN HAMPTON ROADS



Why is it important:
Time spent in traffic comes at a cost for both residents and businesses. Increased congestion adds to the cost of doing business and decreases the quality of life.

How are we doing:
Congestion costs have risen substantially over the last two decades. In 2007 congestion costs in Hampton Roads reached $501 million dollars. Continued congestion will inhibit the ability of the port to be competitive, restrict the flow of tourists, and reduce the quality of life for Hampton Roads residents.

FIGURE 5.6 HAMPTON ROADS CONGESTION AND CONGESTION COSTS

Why is it important:
Time spent in traffic comes at a cost for both residents and businesses. Increased congestion adds to the cost of doing business and decreases the quality of life.

How are we doing:
Congestion costs have risen substantially over the last two decades. In 2007 congestion costs in Hampton Roads reached $501 million dollars. Continued congestion will inhibit the ability of the port to be competitive, restrict the flow of tourists, and reduce the quality of life for Hampton Roads residents.

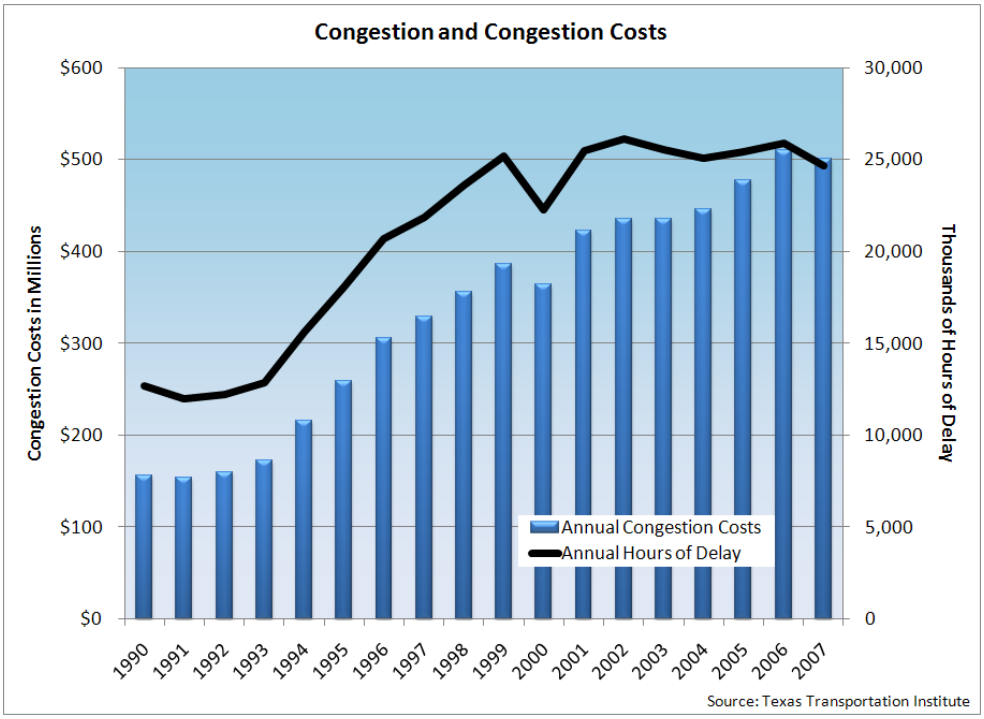
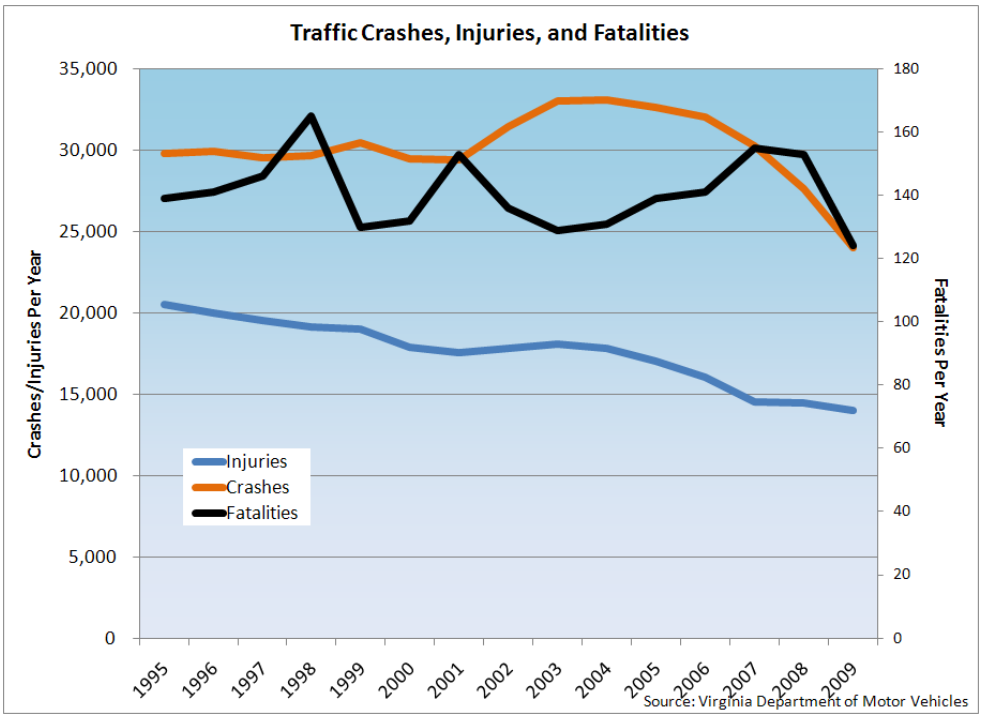


FIGURE 5.7 HAMPTON ROADS TRAFFIC CRASHES



Why is it important:
Today's society is very dependent on automotive transportation. As automobile use increases, so do traffic safety concerns.

How are we doing:
Fatalities due to traffic crashes in Hampton Roads have averaged 140 per year over the past decade, roughly 8.5 deaths per 100,000 residents. The decrease in the numbers of crashes and injuries can be attributed in part to improved safety standards for both roadways and automobiles.

FIGURE 5.8 HAMPTON ROADS VEHICLE REGISTRATIONS

Why is it important:
Population, the number of licensed drivers, and the availability of automobiles are all factors in determining automobile usage.

How are we doing:
As the Hampton Roads population increases, so do the number of licensed drivers. Precipitous growth in the number of registered vehicles has increased the availability of automobiles, subsequently increasing the number of vehicles on the road.

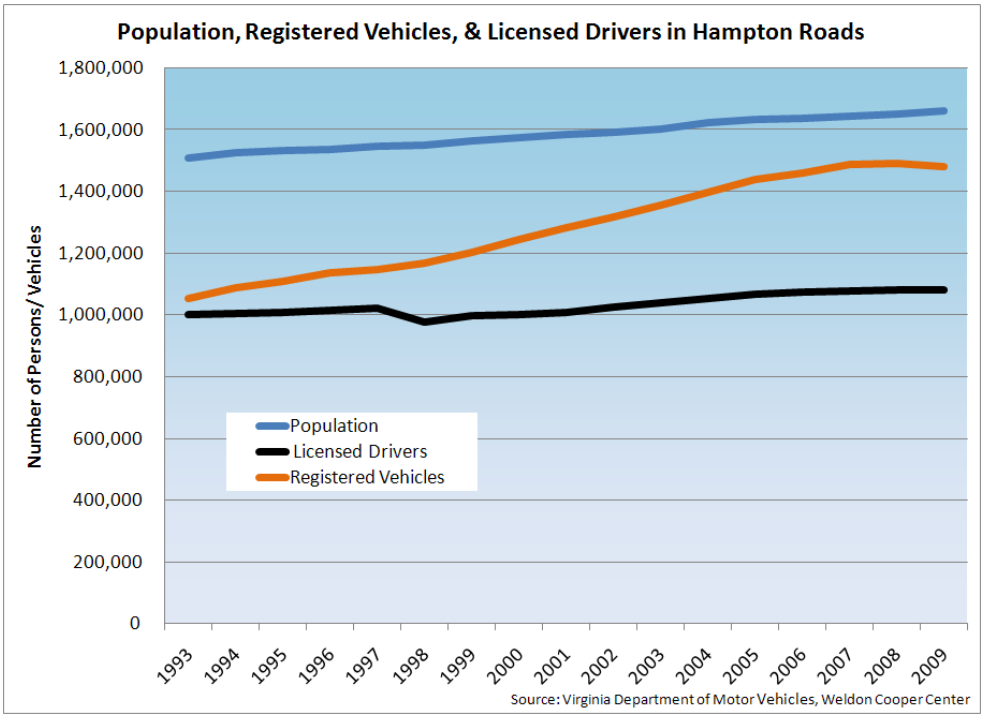
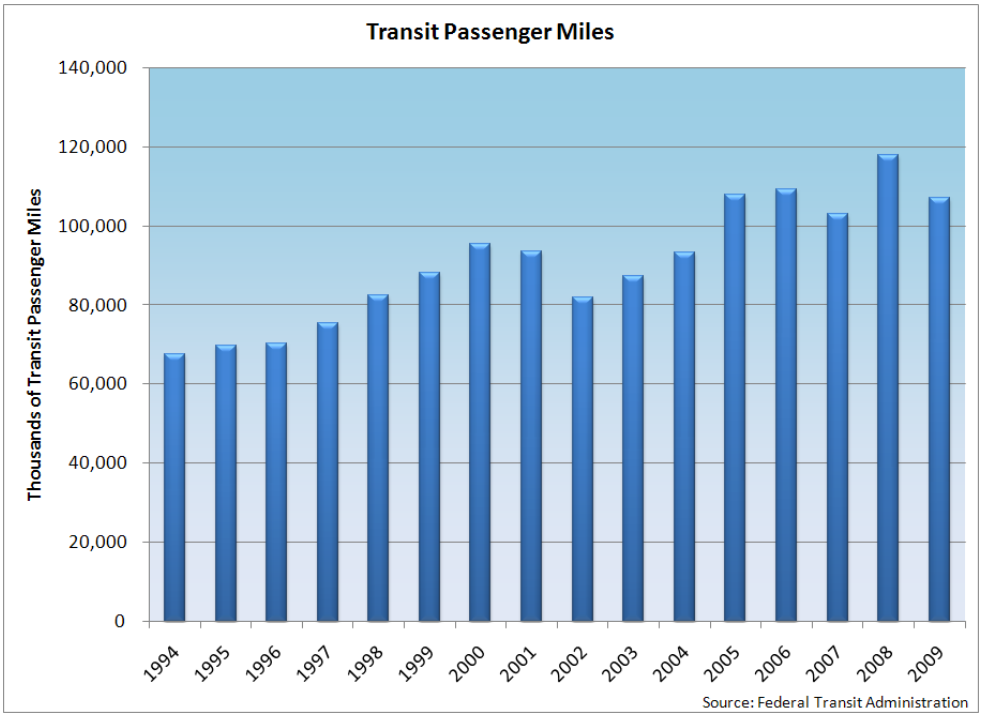


FIGURE 5.9 TRANSIT PASSENGER MILES IN HAMPTON ROADS



Why is it important:
Public transit serves both as primary transportation for those without cars and an alternate source of transportation for commuters. Transit ridership is typically a function of availability, necessity and opportunity.

Passenger miles taken on public transit increased through the latter half of the nineties and again during the middle of this decade. The growth of transit usage will be tightly correlated to both gas prices and congestion levels.

FIGURE 5.10 TRANSIT PASSENGER MILES IN HAMPTON ROADS AND COMPETING METRO AREAS

Why is it important:
Transit passenger miles tend to increase along with the size and density of a metro area. Figure 5.9 illustrates transit usage in Hampton Roads compared to other metro areas.

How are we doing:
Transit usage is relatively low in Hampton Roads due in part to the region's low population density and wide geographical dispersion of employment centers. This is consistent with other low density metro areas, as well as those areas that lack fixed guide-way transit.

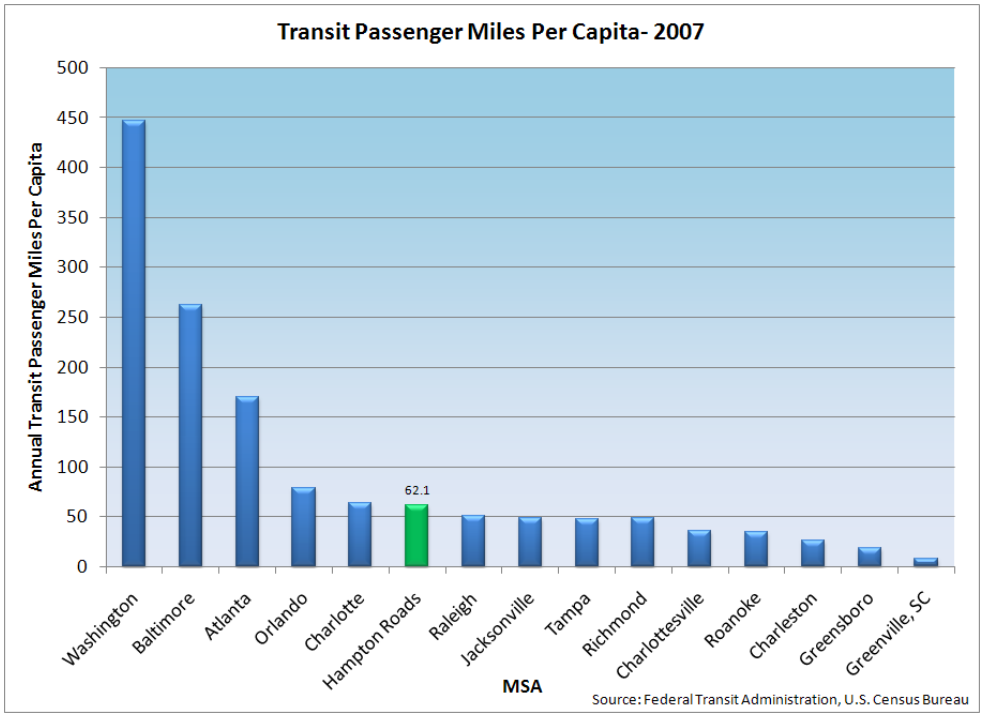
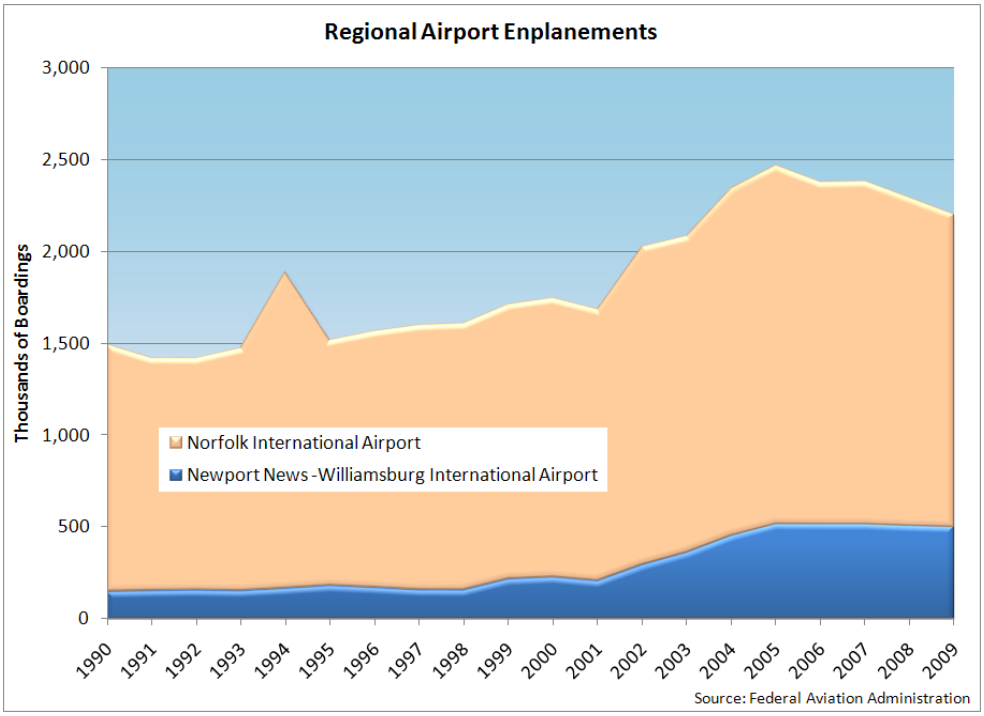


FIGURE 5.11 AIRPORT ENPLANEMENTS AT HAMPTON ROADS AIRPORTS



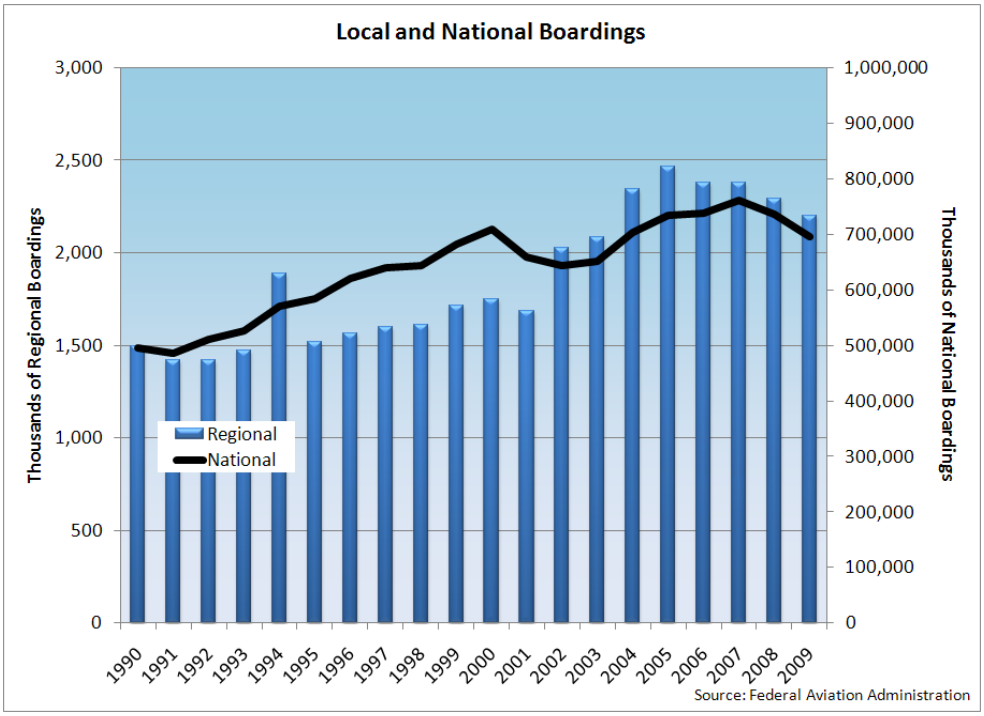
Why is it important:
As the world inches ever closer to a global economy, access to airports and air travel becomes increasingly important.
air

How are we doing:
Value priced airlines have increased competition in the Hampton Roads market, driving down prices and increasing air travel. Evidence of the effect that prices have on the demand for travel is apparent after a price war in 1994 brought about a surge in air travel. Enplanements have declined as a result of the current recession.

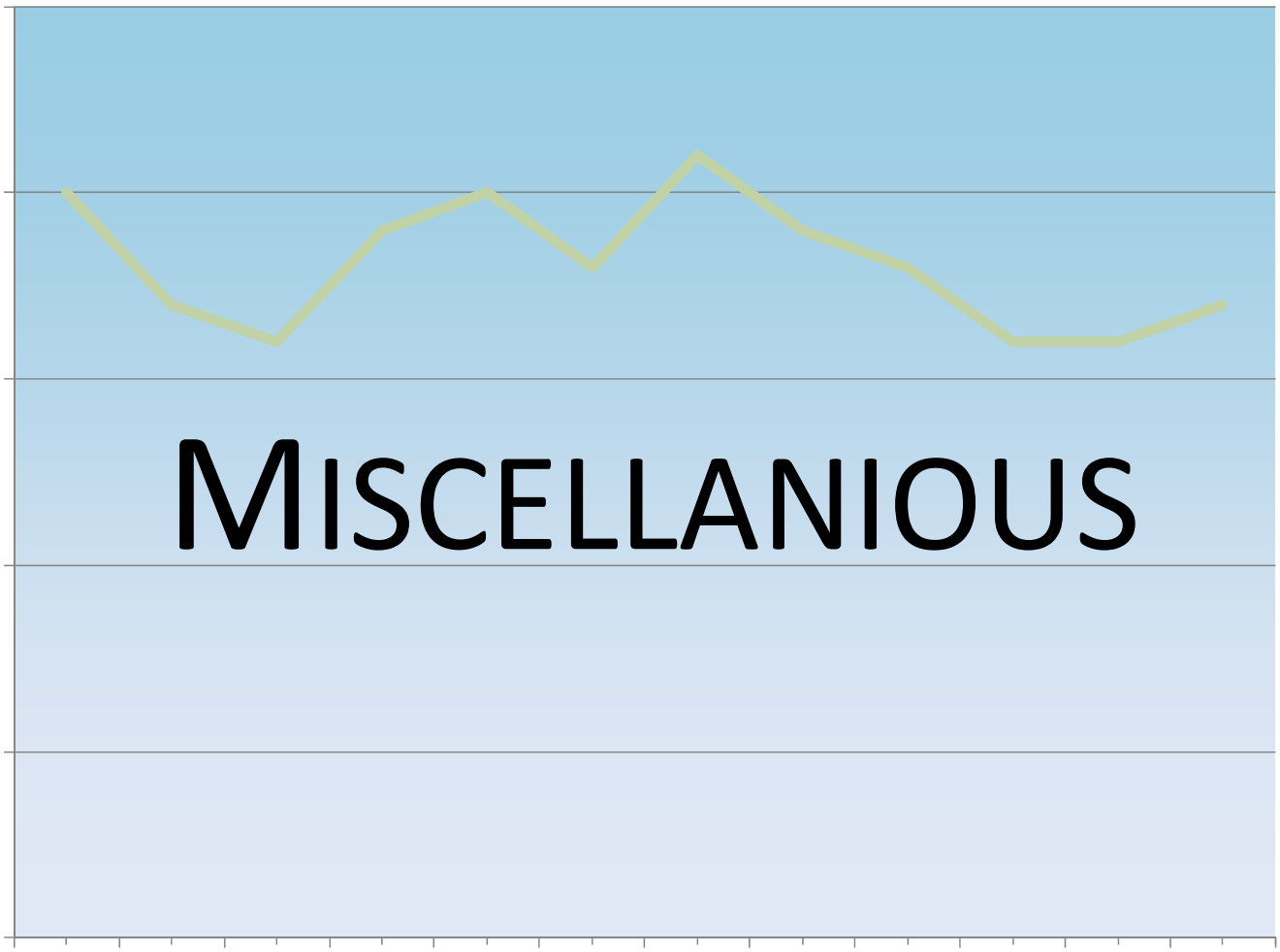
FIGURE 5.12 ENPLANEMENT TREND IN HAMPTON ROADS COMPARED TO THE NATIONAL ENPLANEMENT TREND

Why is it important:
The market for air travel is influenced by several factors including price and consumer confidence. Referencing national air travel trends provides a context with which to better understand regional air travel.

How are we doing:
Following the events of 9/11, the demand for air travel fell and leveled off nationally for three years. The increased service provided by 'low cost carriers' bolstered local air travel and regional boardings before declining with the recession.



SECTION VI



This section of the report includes information on local government revenues and expenditures, education, education, crime, poverty, and the environment.

Miscellaneous

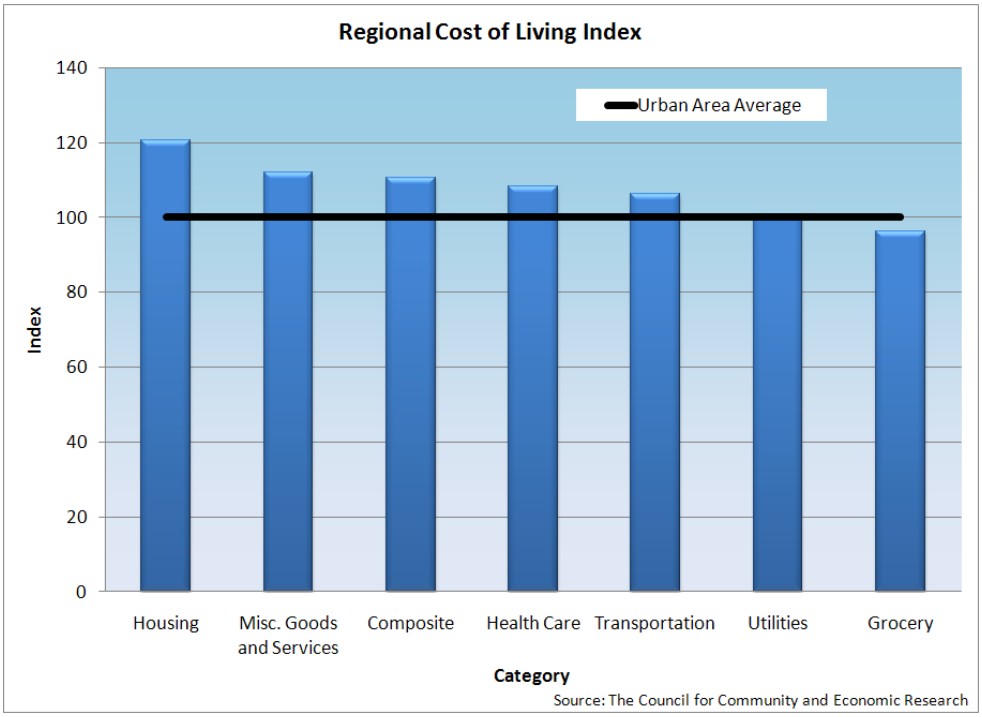
This section focuses on a variety of data related to both the economy and the quality of life in Hampton Roads.

One key issue concerning the Hampton Roads economy is the high cost of living in this metropolitan area as compared to the average urban area. These costs are driven mainly by housing costs that are 20% over the urban area average. When one adjusts regional incomes for the high cost of living, the wages begin to fall into the lower end of Southeastern MSAs that compete with Hampton Roads.

Tax collections have continued to increase in real per capita terms; a reflection of economic growth in excess of the inflation rate. While property tax collections have increased in recent years, it is likely that newer information will reflect declining property values and, subsequently, declining tax revenues for FY2010 and FY2011. It should also be noted that localities in the region devote a large portion of revenue to fund education, with public safety and public works trailing the investments in the school system.

Graduation rates in the region continue to improve, but lag behind the Virginia average. The use of a more accurate cohort measuring method shows the gap between regional and state achievement was not as great as previous measurements indicated. This section also includes data on violent crimes, college enrollment, air quality, retail and industrial space, and regional patents received.

FIGURE 6.1 HAMPTON ROADS COST OF LIVING INDEX



Why is it important:
Variations in the cost of living are not constant across regions but vary by commodity from city to city.

How are we doing:
According to the most recent Council for Community and Economic Research Cost of Living Index, the cost of living in Hampton Roads is well above the Urban Average.

FIGURE 6.2 REVENUE SOURCES FOR LOCAL GOVERNMENTS IN HAMPTON ROADS

Why is it important:
Local governments generate revenues from a variety of different sources. Virginia state law restricts the ability of local governments to tax, requiring localities to heavily utilize the channels available to them.

How are we doing:
The majority of Hampton Roads local government revenues are generated from real & personal property taxes. Other taxes, such as BPOL tax and the utility tax, contribute significantly as well. Increased residential real estate values have boosted local revenue in recent years, though lean times are expected for the near future.

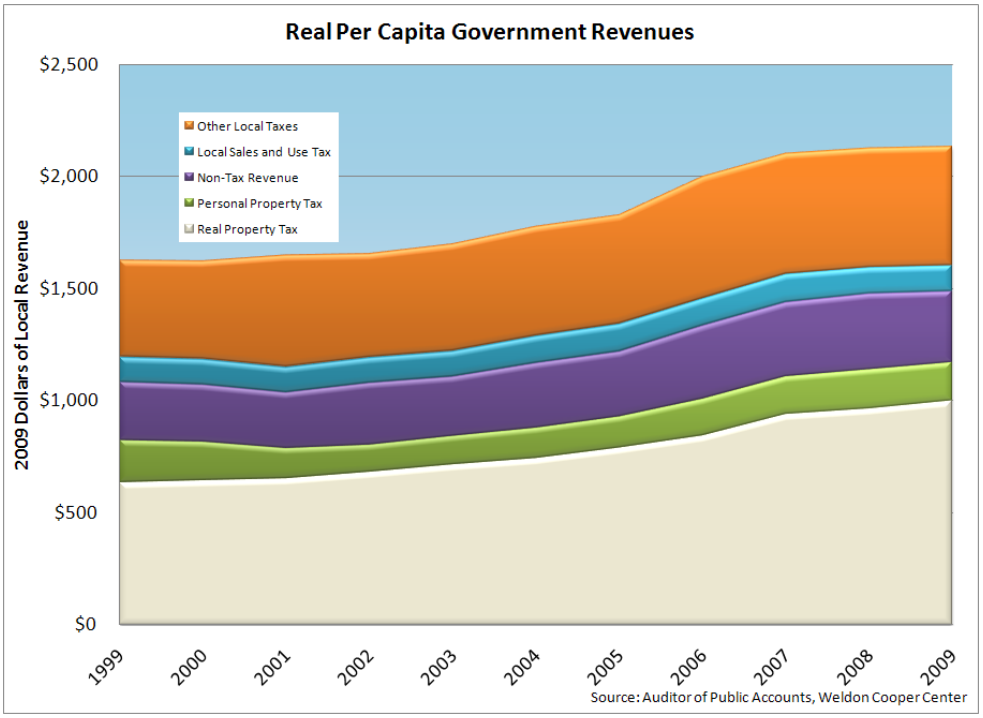
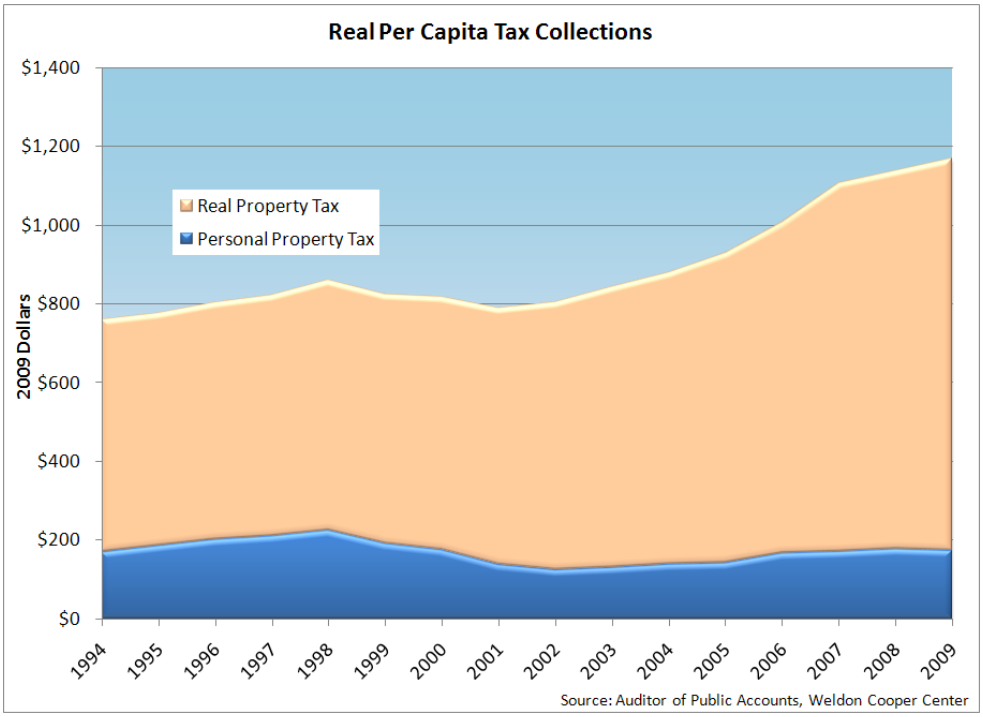


FIGURE 6.3 PROPERTY TAX COLLECTIONS IN HAMPTON ROADS



Why is it important:
The majority of local government revenues are generated from real and personal property tax collections. As a result, local government expenditures are sensitive to variability in either category.

How are we doing:
Real Property Tax collections rose rapidly through the real estate boom. Personal Property taxes have remained relatively flat following a shift in the car tax structure.

FIGURE 6.4 EXPENDITURE CATEGORIES FOR LOCAL GOVERNMENTS IN HAMPTON ROADS

Why is it important:
Local government provides a variety of services to their citizenry. The provision of services is based on state mandates and the demands from residents and businesses. Services are constrained by limited government revenues.

How are we doing:
Over half of all local government expenditures in Hampton Roads are spent on education. Increases in revenues had enabled localities to increase funding for public works and other projects. Recent declines in local government revenue will limit expenditures.

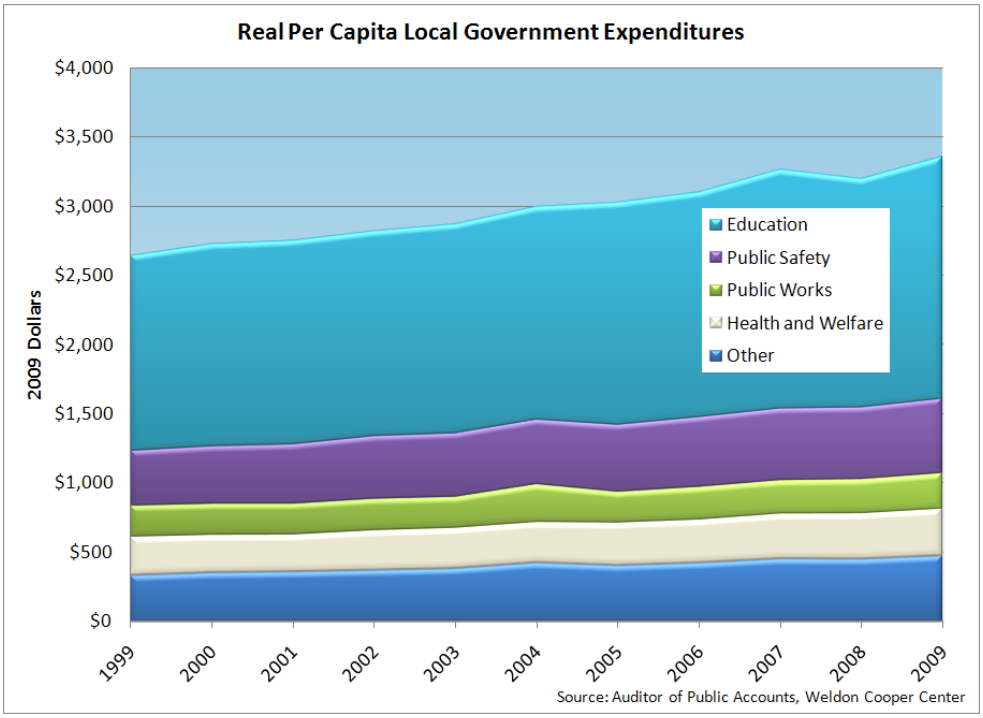
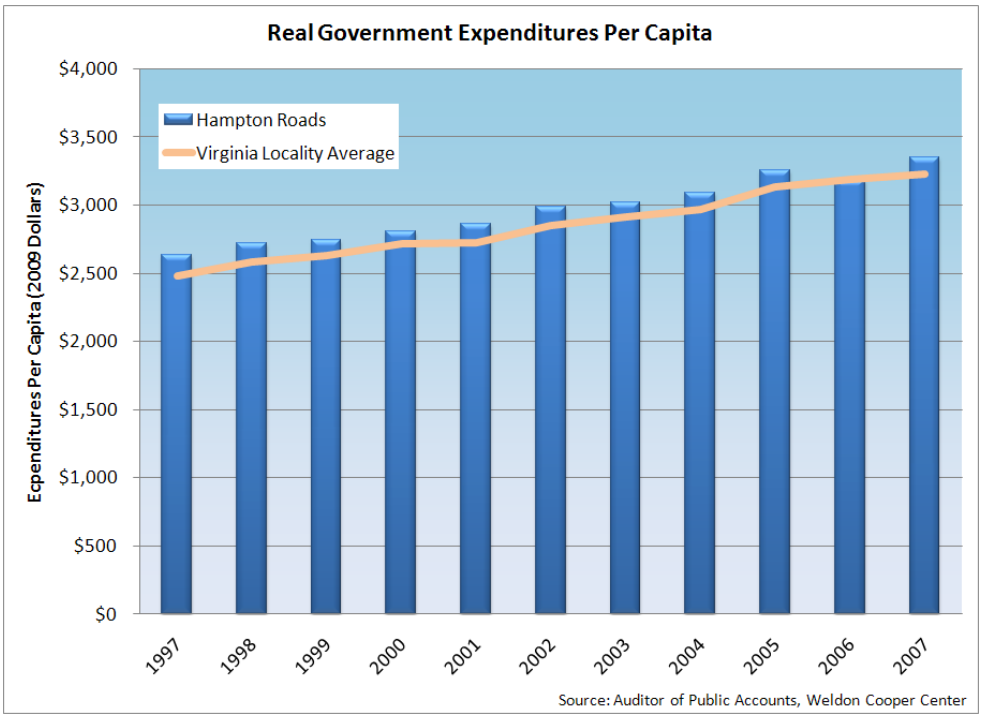


FIGURE 6.5 PER CAPITA LOCAL GOVERNMENT EXPENDITURES IN HAMPTON ROADS AND VIRGINIA



Why is it important:
Figure 6.5 illustrates the per person cost of local government in Hampton Roads and across Virginia. As costs and requests for services increase, so do expenditures.

How are we doing:
Over the past decade, per person expenditures by local governments in Hampton Roads have exceeded the state average. Expenditures continue to increase as localities absorb an increasing share of education and other services.

FIGURE 6.6 SOURCES OF EDUCATION FINANCING FOR HAMPTON ROADS JURISDICTIONS IN FY2009

Why is it important:
The local, state, and federal governments share the financial burden of funding education. All three levels of government utilize unique revenue streams to raise the substantial capital required for education.

How are we doing:
The distribution of education funding has remained relatively constant over the past couple of years. All three levels of government have contributed to the increase in funding for education.

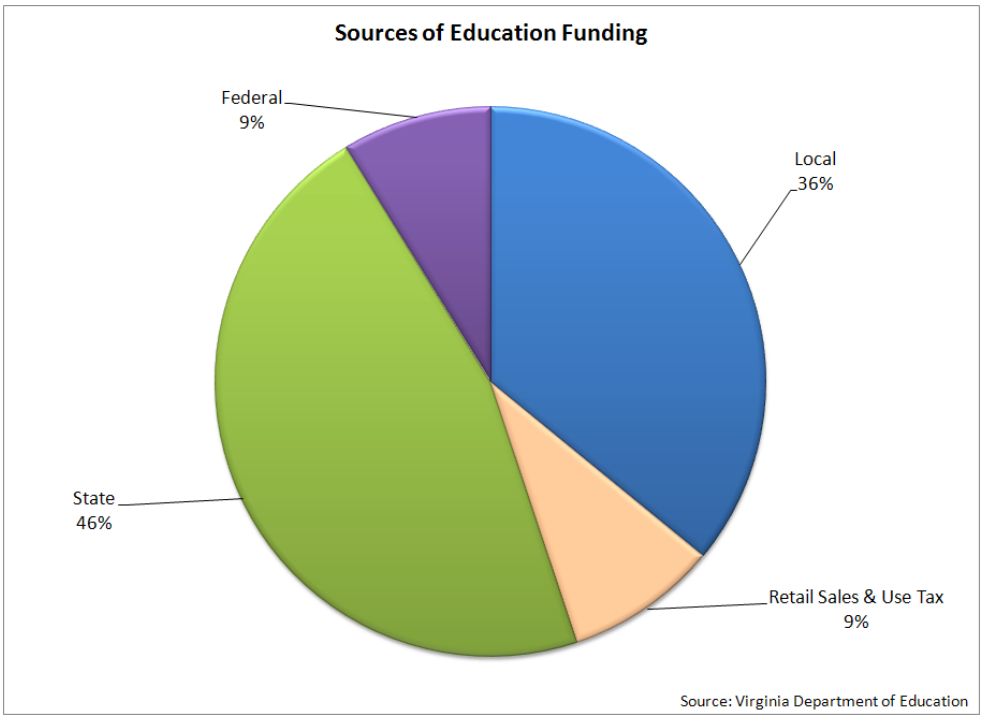
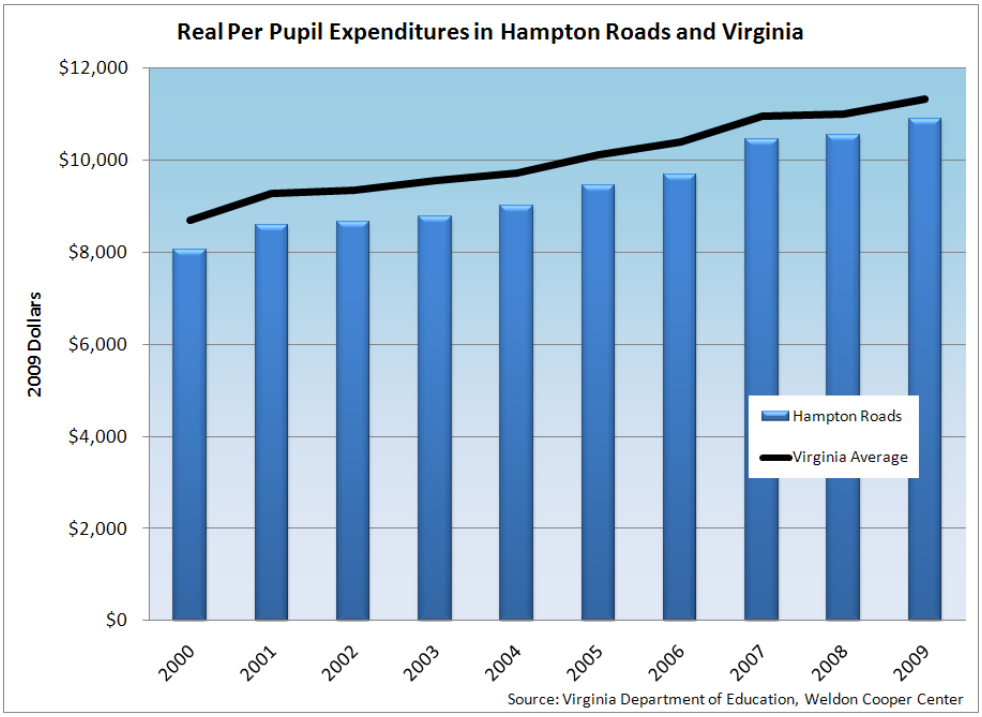


FIGURE 6.7 EXPENDITURES PER PUPIL IN HAMPTON ROADS AND VIRGINIA



Why is it important:
Education expenditures reflect on the cost and priorities of the service area. Figure 6.7 illustrates how local expenditures compare to the state average.

How are we doing:
Per pupil education expenditures in Hampton Roads remain lower than the state average, though Hampton Roads and the state continue to increase spending on education.

FIGURE 6.8 GRADUATION RATES IN HAMPTON ROADS AND VIRGINIA

Why is it important:
Graduation rates are a reflection of a school system's ability to retain and educate students. High graduation rates contribute to a more educated workforce and an increased quality of life.

How are we doing:
Graduation rates in Hampton Roads have consistently lagged behind the state average; however, this gap has narrowed with the use of the new longitudinal study that the Virginia Department of Education has adopted.

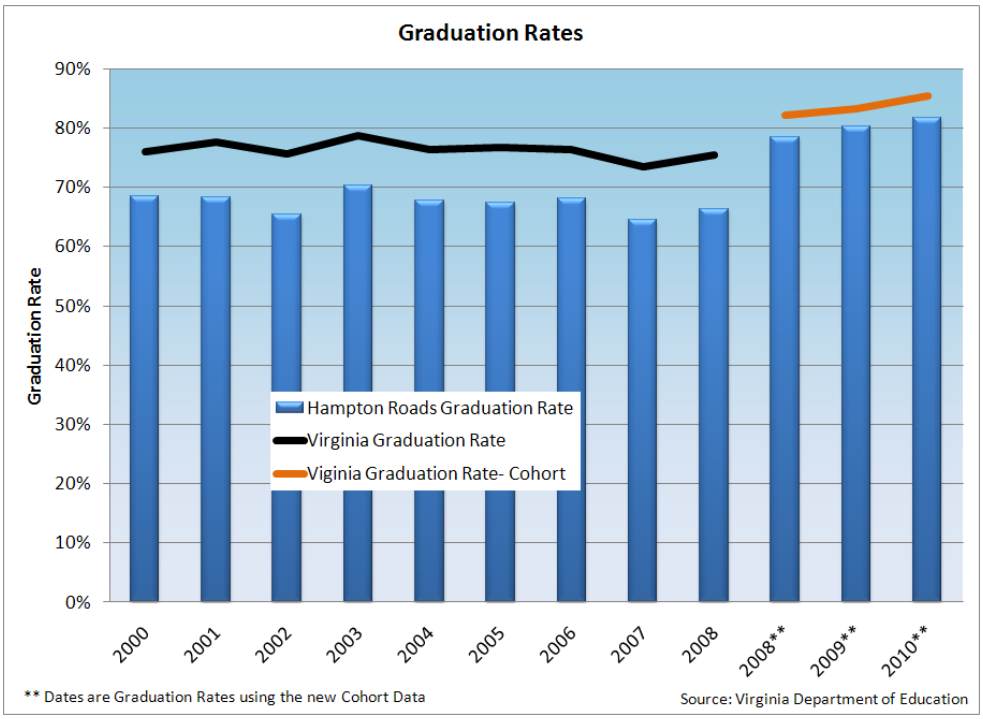
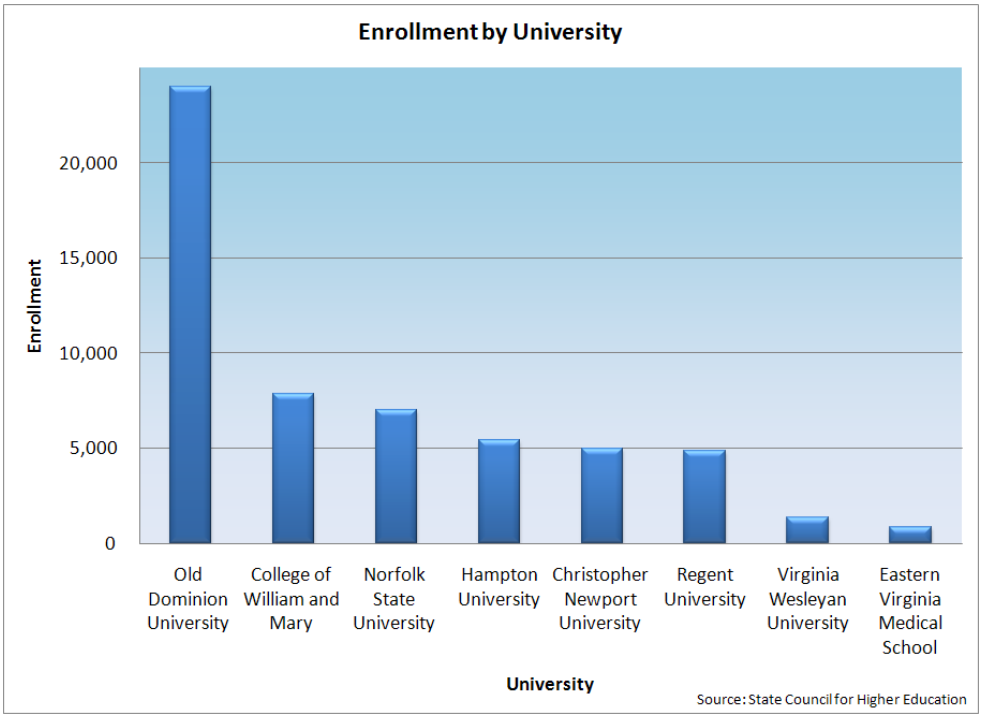


FIGURE 6.9 NUMBER OF ENROLLED STUDENTS AT REGIONAL UNIVERSITIES IN 2009



Why is it important:
Institutions of higher learning provide the education and skills that are necessary for today's advanced workforce. Colleges and universities also tend to contribute to the business and entertainment community of their local environs, boosting the quality of life.

How are we doing:
Hampton Roads is host to numerous institutions of higher education that provide a wide range of degrees and job skills.

FIGURE 6.10 VIOLENT CRIME IN HAMPTON ROADS

Why is it important:
Crime statistics are a reflection of social conditions and quality of life. Crime tends reflect underlying social issues, including inequality and lack of opportunity.

How are we doing:
The rate of violent crime in Hampton Roads tends to be below the national average. In 2008, Hampton Roads had significantly fewer violent crimes per 100,000 persons as compared to the nation.

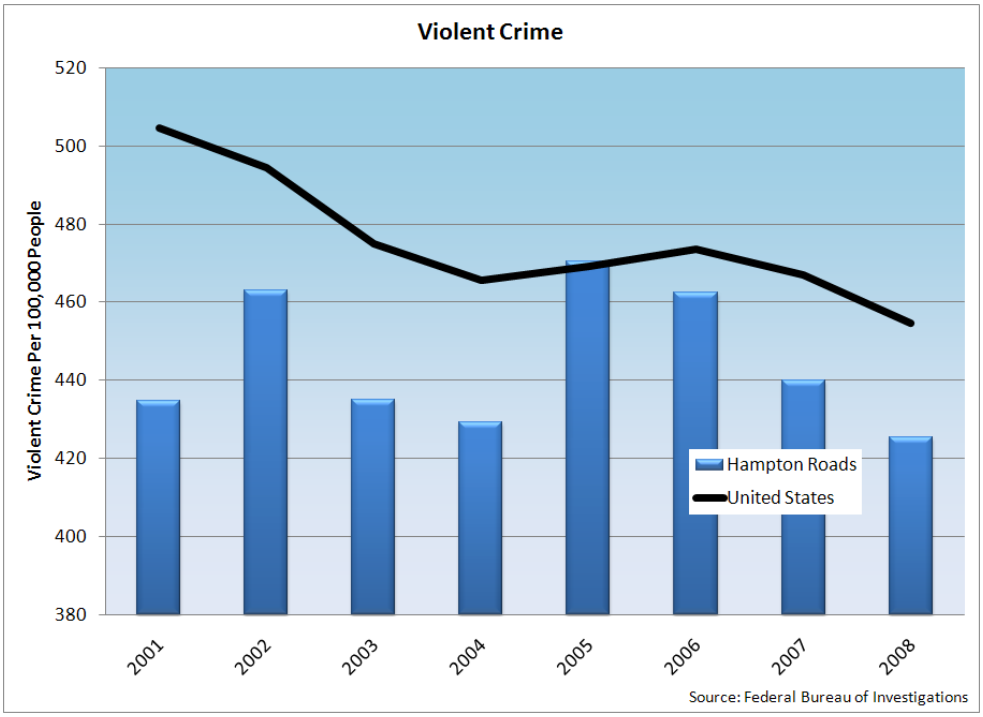
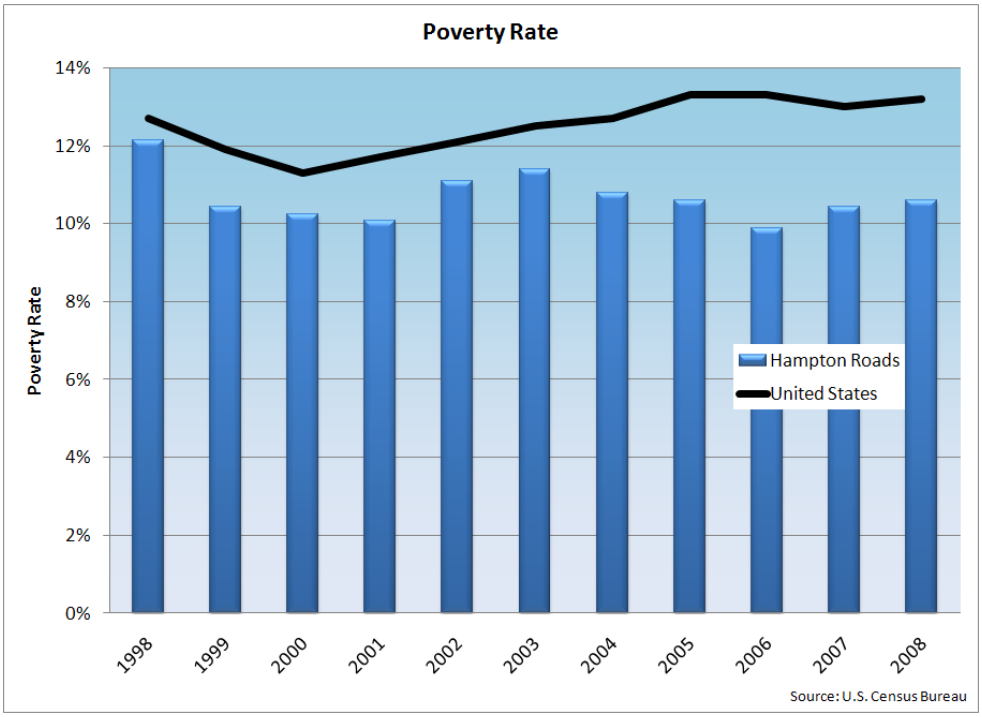


FIGURE 6.11 POVERTY RATES FOR HAMPTON ROADS AND THE UNITED STATES



Why is it important:
Impoverished persons lack the means to acquire adequate food, clothing, and shelter. Poverty rates are indicative of a region's ability to combat the social and economic conditions that result in poverty.

How are we doing:
Historically, poverty rates in Hampton Roads tended to follow the national trend. The region's poverty rate has been below the national average since 1997. The poverty rate has increased slightly in Hampton Roads over the past two years.

FIGURE 6.12 HAMPTON ROADS AIR QUALITY IN 2009

Why is it important:
The Environmental Protection Agency and the Virginia Department of Environmental Quality (DEQ) monitor air quality to protect the health and welfare of the public.

How are we doing:
Of the four air pollutants monitored by Virginia's DEQ, only ozone approaches the primary standard of 75 parts per billion as set by the United States government.

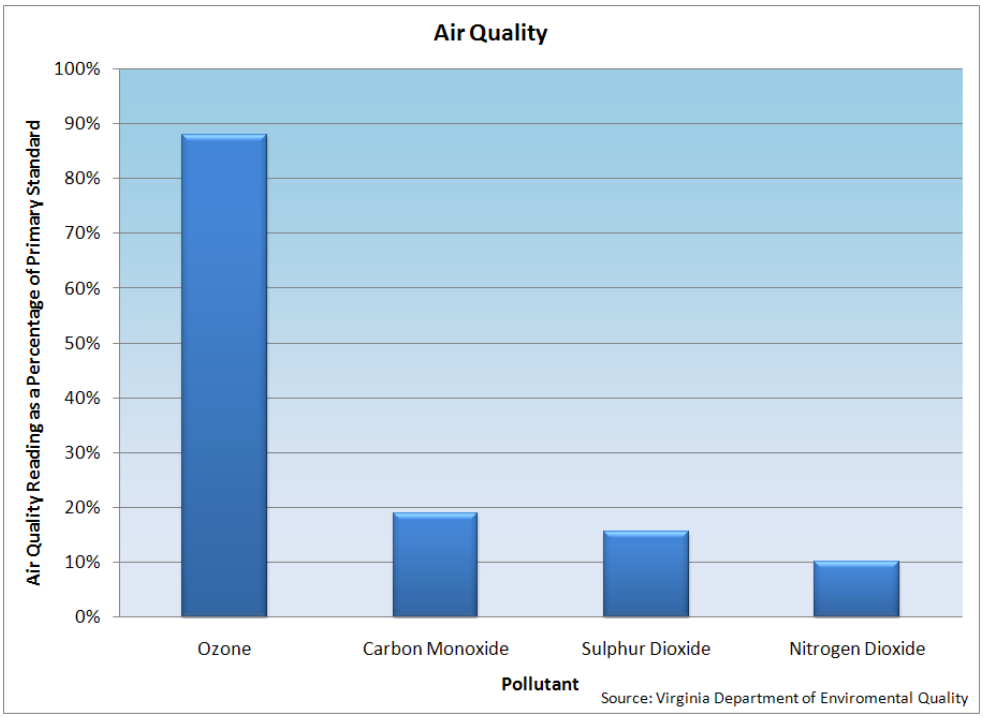
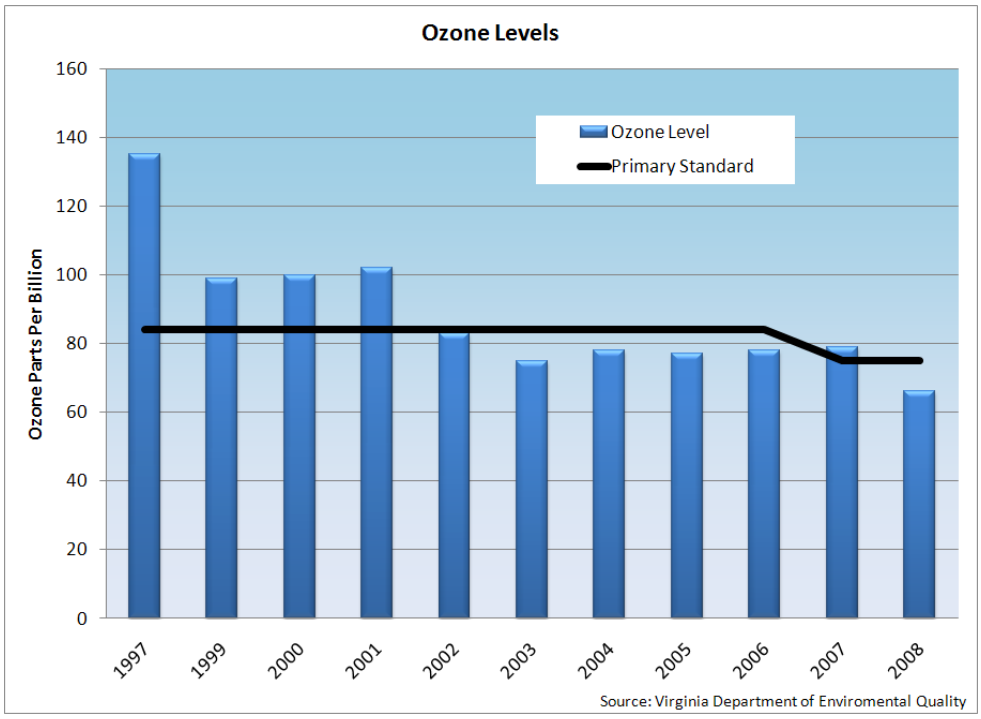


FIGURE 6.13 OZONE LEVELS IN HAMPTON ROADS COMPARED TO THE PRIMARY STANDARD



Why is it important:
According to the National Institute of Environmental Health Sciences, short-term exposure to ambient ozone can have serious health implications.

How are we doing:
The U.S. increased the air quality standard for ozone, lowering the acceptable level to 75ppb (versus 80ppb); this tighter standard has moved Hampton Roads out of compliance, but the region has applied for several exclusions due to the June 2008 Dismal Swamp wild fires. Hampton Roads regained compliance in 2010.

FIGURE 6.14 GROSS LEASABLE RETAIL SPACE IN HAMPTON ROADS

Why is it important:
The availability of retail space reflects market conditions, speculation, and access to real estate.

How are we doing:
Regional gross leasable retail space has grown slowly since 2000. During that time, expanding retail business caused the vacancy rate to dip below 6%. Vacancy rates have started to increase during the current economic weakness and is now back to 2004 levels.

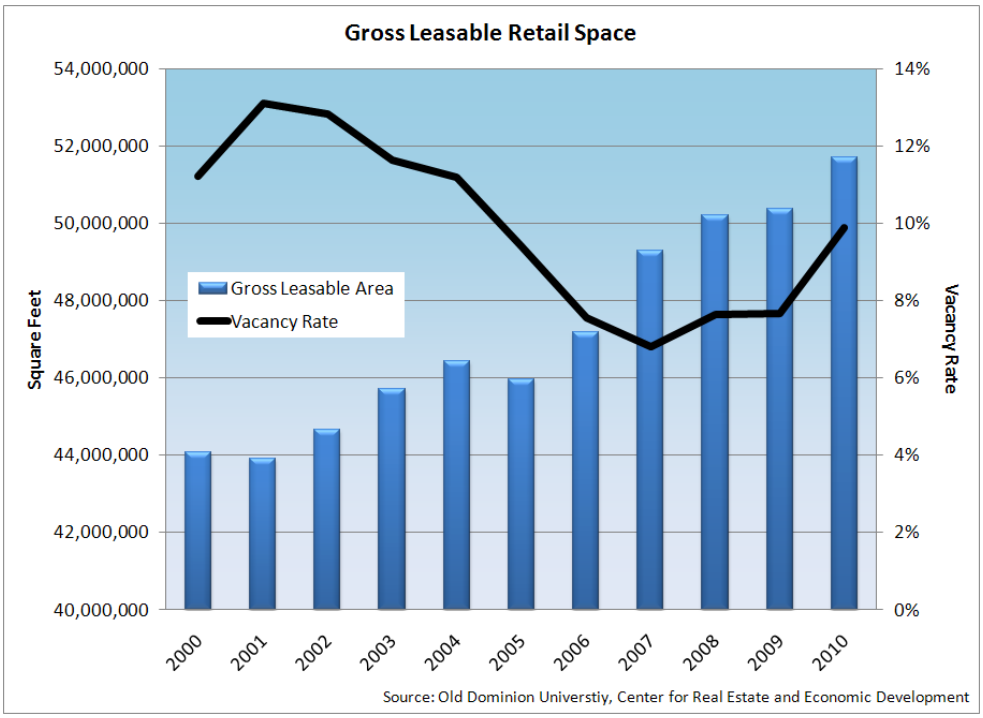
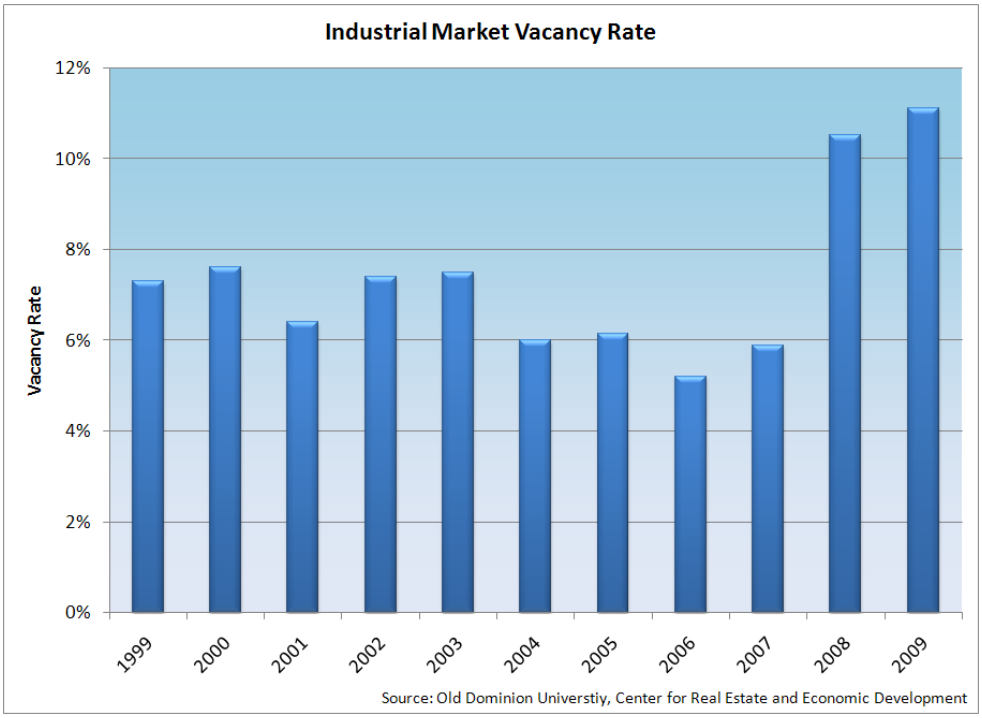


FIGURE 6.15 HAMPTON ROADS INDUSTRIAL MARKET VACANCY RATE



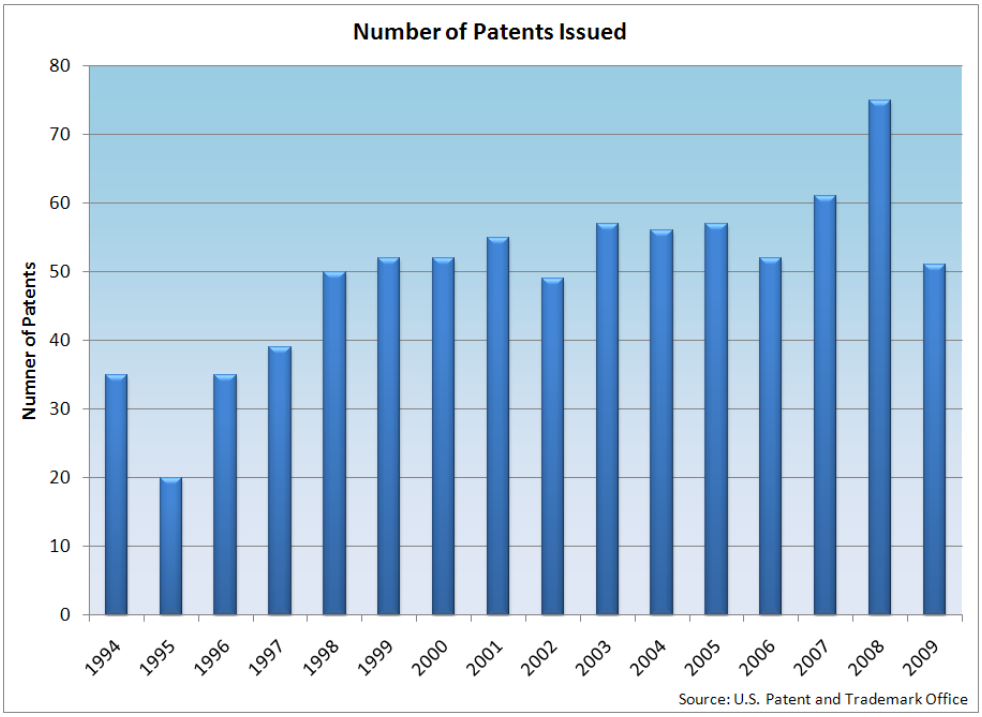
Why is it important:
The industrial market vacancy rate signals the availability of industrial space for area employers. Sudden large changes in the vacancy rate can indicate the arrival or departure of a major employer. Sustained changes are indicative of trends in the industrial market place.

How are we doing:
Industrial vacancy rates have shot up in the past two years, indicating weakness in Hampton Roads industrial sector.

FIGURE 6.16 NUMBER OF PATENTS ISSUED IN HAMPTON ROADS

Why is it important:
The number of patents reflects on the pace of innovation and the entrepreneurial spirit in a community. Entrepreneurs spawn new businesses, which, in turn, contribute to economic growth.

How are we doing:
The level of patenting in Hampton Roads is low compared to other metro areas, suggesting limited entrepreneurial activity. Regional economic development initiatives targeting entrepreneurs hope to spur business development and increase the number of new businesses.



1975	1,958,783,648	81,329,606	22,813,237	288,217,947
1976	2,075,649,073	90,462,854	24,579,808	306,090,198
1977	2,075,444,360	86,604,633	26,084,787	306,668,081
1978	2,232,332,258	91,184,374	27,992,458	326,127,089
1979	2,384,571,308	89,396,151	29,560,286	347,995,428
1980	2,530,238,128	96,931,636	34,615,104	373,846,819
1981	2,652,559,589	106,409,109	36,427,308	389,641,070
1982	2,791,289,042	113,411,626	41,286,583	426,218,377
1983	3,008,808,048	111,344,454	45,792,216	450,948,855
1984	3,194,333,373	118,382,857	48,625,648	480,459,420
1985	3,436,275,863	122,965,956	54,023,829	524,662,880
1986	3,592,070,850	129,811,542	56,971,704	561,728,452
1987	3,761,683,288	140,905,023	62,777,169	605,501,235
1988	3,944,126,907	140,607,407	62,664,562	633,065,853
1989	4,291,144,481	196,879,913	64,733,952	671,204,802
1990	193,809,618	163,929,657	1,086,609,482	80,336,410
1991	197,388,146	177,110,647	1,151,856,957	86,353,806
199				5,477
199				9,694
199				8,230
199				4,716
1996	236,497,524	253,401,050	1,433,417,675	117,462,038
1997	246,153,474	269,392,077	1,491,100,796	115,132,248
1998	257,575,365	308,697,047	1,618,736,342	122,789,185
1999	273,207,893	338,072,319	1,704,225,527	127,957,815
2000	285,444,796	344,074,839	1,842,139,436	139,282,692
2001	293,191,912	350,358,117	1,922,083,355	145,403,387
2002	306,075,163	383,944,022	1,976,431,813	155,892,209
2003	310,376,475	402,767,256	2,076,834,110	171,447,892
2004	392,887,823	420,490,533	2,204,360,674	183,655,374

TABLES

Figure 1.1 Comparable Gross Product in 2008	
Country / Region	Billions of U.S. Dollars
Vietnam	$90.6
Morocco	$85.6
Bangladesh	$79.6
Hampton Roads	$77.1
Angola	$74.3
Croatia	$69.3
Cuba	$68.2

Source: Metro Economy Report, U.S. Conference of Mayors

Figure 1.2 Gross Metro Product in 2009	
Metropolitan Area	(billions)
Washington D.C.	$396.2
Atlanta	$262.7
Baltimore	$132.0
Charlotte	$115.0
Tampa	$107.4
Orlando	$101.6
Hampton Roads	$76.5
Richmond	$59.8
Jacksonville	$58.6
Raleigh	$53.8
Greensboro	$32.5
Charleston	$26.3
Greenville	$24.8

Source: Metro Economy Report, U.S. Conference of Mayors

Figure 1.3 National and Regional Gross Product		
Year	United States GDP	Hampton Roads GRP
1970	-1.00%	-5.08%
1971	3.35%	1.43%
1972	5.43%	3.57%
1973	5.77%	5.75%
1974	-0.59%	1.55%
1975	-0.36%	-1.17%
1976	5.57%	3.47%
1977	4.64%	5.43%
1978	5.51%	6.06%
1979	3.18%	2.76%
1980	-0.23%	1.86%
1981	2.45%	3.85%
1982	-2.03%	1.03%
1983	4.33%	6.30%
1984	7.26%	6.57%
1985	3.85%	4.50%
1986	3.42%	4.95%
1987	3.40%	5.07%
1988	4.17%	2.95%
1989	3.51%	3.08%
1990	1.76%	2.19%
1991	-0.29%	-0.39%
1992	3.40%	0.65%
1993	2.36%	0.56%
1994	4.02%	1.42%
1995	2.51%	-0.22%
1996	4.06%	1.44%
1997	4.64%	1.80%
1998	5.37%	1.15%
1999	4.28%	3.04%
2000	3.60%	1.17%
2001	0.73%	5.26%
2002	1.64%	3.37%
2003	2.67%	3.32%
2004	4.00%	4.07%
2005	3.46%	2.44%
2006	3.79%	3.31%
2007	2.19%	2.38%
2008	0.53%	1.79%
2009	-3.86%	-2.37%

Source: Regional Economic Modeling, Inc.

Figure 1.4 Growth in Real Gross Regional Product For Hampton Roads And Competing Metropolitan Areas From 2005 To 2009	
Statistical Area	Anualized Growth Rate
Raleigh	8.80%
Washington D.C.	7.17%
Orlando	6.63%
Tampa	6.40%
Atlanta	5.46%
Greenville	4.75%
Charleston	3.98%
Baltimore	2.07%
Jacksonville	1.97%
Hampton Roads	1.78%
Richmond	1.30%
Charlotte	1.00%
Greensboro	-0.08%

Source: Metro Economy Report, U.S. Conference of Mayors

Figure 1.5 Per Capita Gross Metro Product	
MSA	2009
Washington D.C.	$72,349
Charlotte	$65,883
Baltimore	$49,054
Orlando	$48,789
Richmond	$48,296
Atlanta	$47,980
Raleigh	$47,787
Hampton Roads	$45,685
Greensboro	$45,469
Jacksonville	$44,122
Charleston	$39,897
Tampa	$39,093
Greenville	$38,773

Sources: Metro Economy Report, U.S. Conference of Mayors, U.S. Census Bureau

Figure 1.6 Annual Growth in Per Capita GDP		
Year	U.S.	Hampton Roads
1991	-1.35%	-1.24%
1992	2.23%	-1.55%
1993	1.27%	-0.80%
1994	3.00%	0.67%
1995	1.55%	-0.74%
1996	3.11%	1.11%
1997	3.64%	1.24%
1998	4.41%	1.09%
1999	3.35%	2.24%
2000	0.12%	0.03%
2001	-0.30%	4.67%
2002	0.68%	2.05%
2003	1.77%	1.95%
2004	3.03%	2.80%
2005	2.51%	1.98%
2006	2.80%	2.50%
2007	1.17%	2.43%
2008	-0.40%	1.88%
2009	-4.68%	-2.62%

Sources: REMI, HRPDC, U.S. Census Bureau

Figure 1.7 Employment And Gross Product In Hampton Roads		
Year	Percent Change GRP	Percent Change Employment
1970	-5.08%	-1.97%
1971	1.43%	0.17%
1972	3.57%	2.16%
1973	5.75%	4.34%
1974	1.55%	2.90%
1975	-1.17%	-2.02%
1976	3.47%	1.85%
1977	5.43%	3.63%
1978	6.06%	4.55%
1979	2.76%	1.49%
1980	1.86%	1.56%
1981	3.85%	1.07%
1982	1.03%	0.86%
1983	6.30%	2.97%
1984	6.57%	4.70%
1985	4.50%	4.53%
1986	4.95%	3.83%
1987	5.07%	4.37%
1988	2.95%	2.06%
1989	3.08%	1.76%
1990	2.19%	1.37%
1991	-0.39%	-1.19%
1992	0.65%	0.49%
1993	0.56%	0.91%
1994	1.42%	0.33%
1995	-0.22%	1.77%
1996	1.44%	1.75%
1997	1.80%	1.60%
1998	1.15%	1.16%
1999	3.04%	0.97%
2000	1.17%	1.92%
2001	5.26%	0.89%
2002	3.37%	0.75%
2003	3.32%	1.49%
2004	4.07%	2.26%
2005	2.44%	1.51%
2006	3.31%	1.22%
2007	2.38%	1.40%
2008	1.79%	0.39%
2009	-2.37%	

Sources: Regional Economic Modeling, Inc., Bureau of Economic Analysis

Figure 1.8 Year-Over-Year Change in Hampton Roads Monthly Employment					
Date	Percent Change	Date	Percent Change	Date	Percent Change
Oct-00	1.38%	Feb-04	0.88%	Jun-07	0.74%
Nov-00	1.57%	Mar-04	1.05%	Jul-07	1.88%
Dec-00	1.32%	Apr-04	2.01%	Aug-07	1.57%
Jan-01	1.09%	May-04	1.80%	Sep-07	1.81%
Feb-01	0.97%	Jun-04	1.89%	Oct-07	0.53%
Mar-01	0.81%	Jul-04	1.97%	Nov-07	0.44%
Apr-01	1.68%	Aug-04	1.98%	Dec-07	0.04%
May-01	1.82%	Sep-04	2.15%	Jan-08	-0.63%
Jun-01	1.70%	Oct-04	1.71%	Feb-08	-0.36%
Jul-01	1.94%	Nov-04	1.51%	Mar-08	-0.61%
Aug-01	1.79%	Dec-04	1.73%	Apr-08	-0.80%
Sep-01	1.56%	Jan-05	1.21%	May-08	-0.62%
Oct-01	1.23%	Feb-05	1.51%	Jun-08	-0.72%
Nov-01	1.25%	Mar-05	1.48%	Jul-08	-1.32%
Dec-01	1.18%	Apr-05	1.77%	Aug-08	-1.17%
Jan-02	1.00%	May-05	1.77%	Sep-08	-1.70%
Feb-02	1.22%	Jun-05	1.93%	Oct-08	-1.31%
Mar-02	0.93%	Jul-05	1.72%	Nov-08	-2.12%
Apr-02	0.55%	Aug-05	1.84%	Dec-08	-2.37%
May-02	0.52%	Sep-05	2.02%	Jan-09	-2.26%
Jun-02	0.40%	Oct-05	0.81%	Feb-09	-2.88%
Jul-02	-0.23%	Nov-05	0.87%	Mar-09	-3.25%
Aug-02	-0.07%	Dec-05	0.68%	Apr-09	-3.27%
Sep-02	-0.24%	Jan-06	1.30%	May-09	-3.48%
Oct-02	0.59%	Feb-06	1.17%	Jun-09	-3.85%
Nov-02	0.35%	Mar-06	1.33%	Jul-09	-4.47%
Dec-02	0.69%	Apr-06	0.90%	Aug-09	-4.49%
Jan-03	1.05%	May-06	0.85%	Sep-09	-4.06%
Feb-03	0.65%	Jun-06	0.88%	Oct-09	-3.71%
Mar-03	0.69%	Jul-06	0.59%	Nov-09	-3.38%
Apr-03	0.14%	Aug-06	0.23%	Dec-09	-3.08%
May-03	0.28%	Sep-06	-0.39%	Jan-10	-1.83%
Jun-03	0.08%	Oct-06	1.08%	Feb-10	-1.69%
Jul-03	0.72%	Nov-06	1.11%	Mar-10	-1.40%
Aug-03	0.47%	Dec-06	1.28%	Apr-10	-0.92%
Sep-03	0.50%	Jan-07	1.38%	May-10	-0.82%
Oct-03	0.34%	Feb-07	1.24%	Jun-10	-0.81%
Nov-03	0.61%	Mar-07	1.11%	Jul-10	0.39%
Dec-03	0.36%	Apr-07	0.89%	Aug-10	0.72%
Jan-04	1.04%	May-07	0.94%	Sep-10	0.84%
				Source: Bureau of Labor Statistics	

Figure 1.10 Recent Employment Growth In Hampton Roads And Competing Statistical Areas	
Statistical Area	Percent Change
Raleigh	14.15%
Charlotte	11.44%
Charleston	8.70%
Atlanta	8.17%
Charlottesville	7.71%
Greenville	7.40%
Orlando	6.25%
Jacksonville	5.74%
Washington D.C.	5.51%
Roanoke	5.37%
Richmond	5.02%
Baltimore	5.00%
Greensboro	4.69%
Hampton Roads	3.03%
Tampa-St. Petersburg	0.99%

Source: Bureau of Labor Statistics

Figure 1.11 Comparison Of Goods And Service Employment In Hampton Roads		
Year	Goods Employment	Service Employment
1999	105,000	601,700
2000	109,100	611,300
2001	108,500	622,100
2002	104,700	629,300
2003	106,500	631,200
2004	108,500	641,300
2005	109,900	650,900
2006	108,200	659,100
2007	106,200	669,100
2008	101,600	664,800
2009	92,000	647,500

Source: Bureau of Labor Statistics

Figure 1.13 Distribution of Employment in Hampton Roads by Industry Sector	
Industry Sector	Employment
Professional and Business Services	99,000
Education and Health Services	92,900
Local Government	88,000
Retail Trade	83,900
Lesiure and Hospitality	83,800
Manufacturing	53,500
Federal Government	48,400
Mining, Logging, & Construction	38,500
Financial Activities	37,700
Other Services	34,300
Trasnportation and Utilities	23,300
Wholesale Trade	21,900
State Government	21,000
Information	13,300

Source: Bureau of Labor Statistics

Figure 1.14 Change In Hampton Roads Employment By Industrial Sector From 2006 To 2009	
Industry Sector	Change in Employment
Education and Health Services	5,700
Federal Government	2,100
Local Government	1,300
State Government	900
Other Services	200
Lesiure and Hospitality	(700)
Information	(2,100)
Wholesale Trade	(2,200)
Trasnportation and Utilities	(2,700)
Professional and Business Services	(3,000)
Financial Activities	(3,000)
Manufacturing	(4,900)
Retail Trade	(8,300)
Mining, Logging, & Construction	(11,300)

Source: Bureau of Labor Statistics

Figure 1.15 Hampton Roads Industrial Location Quotients In 2009	
Industry	LQ
Military (2008)	8.73
Real estate and renting and leasing (2006)	1.44
Accomidations and Food Services	1.24
Leisure and hospitality	1.23
Construction	1.19
Arts, Entertainment, & Recreation	1.15
Professional and Business Services	1.12
Retail Trade	1.11

Sources: Bureau of Economic Analysis
Bureau of Labor Statistics, HRPDC

Figure 1.16 Hampton Roads Sub-Sector Location Quotients In 2009	
Sub-Sector Industry	LQ
Water transportation	4.10
Transportation equipment man.	3.55
Lessors nonfin intangible assets	3.49
Attractions	3.26
Transportation support	2.65
Broadcasting, except Internet	2.50
Real Estate (2008)	1.54
Nonstore retailers	1.41
Accommodation	1.40
Scenic transportation	1.26
Specialty trade contractors	1.21
Food Service and Drinking Places	1.21
ISPs & data processing	1.19
General merchandise stores	1.17
Textile Product Mills	1.17
Sporting goods & hobby stores	1.16
Rental and leasing services	1.16
Furniture	1.15
Amusements & recreation	1.13
Fishing and Hunting	1.12
Warehousing	1.08

Source: Bureau of Labor Statistics

Figure 1.17 Deseasonalized Unemployment Rates In Hampton Roads And The United States								
Month	U.S.	HR	Month	U.S.	HR	Month	U.S.	HR
Jan-00	4.01%	2.8%	Aug-03	6.07%	4.2%	Mar-07	4.39%	3.0%
Feb-00	4.11%	2.8%	Sep-03	6.09%	4.3%	Apr-07	4.49%	3.0%
Mar-00	4.03%	2.7%	Oct-03	5.95%	4.1%	May-07	4.43%	3.0%
Apr-00	3.84%	2.4%	Nov-03	5.83%	4.1%	Jun-07	4.55%	3.1%
May-00	4.04%	2.6%	Dec-03	5.67%	4.0%	Jul-07	4.65%	3.2%
Jun-00	3.96%	2.5%	Jan-04	5.70%	4.1%	Aug-07	4.64%	3.2%
Jul-00	4.04%	2.5%	Feb-04	5.57%	4.0%	Sep-07	4.69%	3.3%
Aug-00	4.11%	2.5%	Mar-04	5.78%	4.2%	Oct-07	4.75%	3.2%
Sep-00	3.95%	2.4%	Apr-04	5.56%	3.9%	Nov-07	4.74%	3.4%
Oct-00	3.88%	2.3%	May-04	5.58%	3.9%	Dec-07	5.00%	3.6%
Nov-00	3.94%	2.3%	Jun-04	5.62%	4.0%	Jan-08	4.95%	3.5%
Dec-00	3.93%	2.3%	Jul-04	5.51%	4.0%	Feb-08	4.84%	3.5%
Jan-01	4.19%	2.6%	Aug-04	5.41%	3.9%	Mar-08	5.06%	3.7%
Feb-01	4.24%	2.7%	Sep-04	5.38%	3.9%	Apr-08	4.96%	3.6%
Mar-01	4.27%	2.9%	Oct-04	5.45%	4.0%	May-08	5.44%	3.9%
Apr-01	4.37%	3.0%	Nov-04	5.35%	4.0%	Jun-08	5.55%	4.0%
May-01	4.34%	3.1%	Dec-04	5.36%	4.1%	Jul-08	5.76%	4.1%
Jun-01	4.52%	3.2%	Jan-05	5.26%	4.0%	Aug-08	6.15%	4.3%
Jul-01	4.58%	3.1%	Feb-05	5.38%	4.1%	Sep-08	6.19%	4.4%
Aug-01	4.91%	3.5%	Mar-05	5.21%	4.1%	Oct-08	6.57%	4.6%
Sep-01	4.96%	3.6%	Apr-05	5.15%	4.1%	Nov-08	6.87%	5.0%
Oct-01	5.34%	3.7%	May-05	5.13%	4.0%	Dec-08	7.37%	5.5%
Nov-01	5.55%	4.0%	Jun-05	5.04%	3.9%	Jan-09	7.73%	5.8%
Dec-01	5.72%	4.1%	Jul-05	4.96%	3.8%	Feb-09	8.23%	6.2%
Jan-02	5.69%	4.0%	Aug-05	4.90%	3.8%	Mar-09	8.63%	6.5%
Feb-02	5.68%	4.1%	Sep-05	5.04%	4.0%	Apr-09	8.93%	6.7%
Mar-02	5.75%	4.2%	Oct-05	4.97%	3.8%	May-09	9.37%	6.9%
Apr-02	5.94%	4.3%	Nov-05	5.04%	3.9%	Jun-09	9.51%	6.9%
May-02	5.79%	4.2%	Dec-05	4.85%	3.6%	Jul-09	9.42%	6.9%
Jun-02	5.80%	4.1%	Jan-06	4.70%	3.3%	Aug-09	9.71%	6.9%
Jul-02	5.79%	4.1%	Feb-06	4.77%	3.4%	Sep-09	9.85%	7.3%
Aug-02	5.73%	4.0%	Mar-06	4.69%	3.3%	Oct-09	10.15%	7.3%
Sep-02	5.67%	4.0%	Apr-06	4.72%	3.3%	Nov-09	9.98%	7.2%
Oct-02	5.72%	4.0%	May-06	4.62%	3.2%	Dec-09	9.97%	7.3%
Nov-02	5.87%	4.1%	Jun-06	4.62%	3.2%	Jan-10	9.69%	7.2%
Dec-02	5.96%	4.2%	Jul-06	4.73%	3.4%	Feb-10	9.69%	7.4%
Jan-03	5.84%	4.2%	Aug-06	4.68%	3.3%	Mar-10	9.75%	7.6%
Feb-03	5.90%	4.1%	Sep-06	4.52%	3.6%	Apr-10	9.86%	7.6%
Mar-03	5.88%	4.2%	Oct-06	4.43%	3.4%	May-10	9.70%	7.5%
Apr-03	6.04%	4.2%	Nov-06	4.52%	3.3%	Jun-10	9.51%	7.3%
May-03	6.11%	4.3%	Dec-06	4.44%	3.2%	Jul-10	9.51%	7.3%
Jun-03	6.30%	4.4%	Jan-07	4.63%	3.1%	Aug-10	9.64%	7.3%
Jul-03	6.15%	4.4%	Feb-07	4.51%	3.1%	Sep-10	9.58%	7.3%

Source: Bureau of Labor Statistics

Figure 1.18 Employment To Population Ratios In Hampton Roads And Competing Metro Areas	
Metro Area	Employment to Population Ratio
Washington DC	72.6%
Charlottesville	70.1%
Roanoke	69.0%
Charlotte	65.1%
Greensboro	64.8%
Baltimore	63.9%
Richmond	63.8%
Greenville	63.7%
Orlando	63.6%
Charleston	63.0%
Jacksonville	62.8%
Hampton Roads	62.6%
Raleigh	62.1%
Atlanta	60.1%
Tampa	57.7%

Source: Bureau of Economic Analysis

Figure 1.19 Historic Employment To Population Ratios In Hampton Roads	
Year	Employment to Population Ratio
1998	59.3%
1999	59.5%
2000	60.0%
2001	60.2%
2002	59.9%
2003	60.0%
2004	60.6%
2005	61.2%
2006	61.5%
2007	62.3%
2008	62.6%

Source: Bureau of Economic Analysis

Figure 1.20 Per Capita Income In Hampton Roads And Competing Metro Areas	
Region	Per Capita Income
Washington	$ 56,442
Baltimore	$ 47,962
Charlottesville	$ 42,857
Richmond	$ 41,242
Hampton Roads	$ 39,674
Jacksonville	$ 38,801
Roanoke	$ 38,166
Raleigh	$ 37,849
Charlotte	$ 37,372
Tampa	$ 36,780
Atlanta	$ 36,482
Charelston	$ 34,797
Orlando	$ 34,315
Greensboro	$ 34,300
Greenville	$ 32,773
United States	$ 39,595

Source: Bureau of Economic Analysis

Figure 1.21 Purchasing Power Of Per Capita Income In Hampton Roads And Competing Metro Areas In 2008	
Metro Area	Purchasing Power of PCI
Jacksonville	$41,366
Washington	$40,723
Charlottesville	$40,661
Charlotte	$40,056
Roanoke	$40,048
Baltimore	$39,475
Tampa	$39,211
Atlanta	$38,728
Richmond	$38,652
Greensboro	$37,445
Raleigh	$37,363
Greenville	$36,455
Hampton Roads	$35,872
Charleston	$35,007
Orlando	$34,873

Sources: Bureau of Economic Analysis
Center for Community and Economic Research

Figure 1.22 Hampton Roads Per Capita Income In Relation To The National Average	
Year	Ratio of HR to U.S. PCI
1999	89.0%
2000	88.3%
2001	91.6%
2002	93.8%
2003	96.3%
2004	95.9%
2005	96.4%
2006	96.4%
2007	96.7%
2008	96.7%
2009	100.2%

Source: Bureau of Economic Analysis

Figure 1.23 Real Family Incomes		
Year	Median Income	Magin of Error
1989	$60,183	
1999	$63,339	
2005	$66,746	+/- 1,031
2006	$66,135	+/- 965
2007	$65,993	+/- 1,303
2008	$68,088	+/- 1,124
2009	$64,629	+/- 1,324

Sources: U.S. Census, American Community Survey
Bureau of Labor Statistics, HRPDC

Figure 1.24 Real Earnings Per Worker (2009 $'s)	
Year	HR Earnings Per Worker
1998	$43,258
1999	$44,052
2000	$44,619
2001	$46,086
2002	$47,764
2003	$49,470
2004	$50,214
2005	$50,236
2006	$51,003
2007	$50,926
2008	$49,716

Source Bureau of Economic Analysis

Figure 2.1 Concentration Of Military Employment		
Year	HR Military Employment as a Percent of Total Employment	Military Employment
1993	15.3%	131,794
1994	14.5%	125,553
1995	14.0%	123,577
1996	13.1%	117,290
1997	12.2%	110,795
1998	11.6%	106,541
1999	11.7%	108,382
2000	11.7%	110,522
2001	11.5%	110,148
2002	11.6%	111,995
2003	11.6%	113,193
2004	11.2%	111,830
2005	10.7%	108,269
2006	10.5%	108,375
2007	10.2%	106,300
2008	10.0%	104,414

Source: Bureau of Labor Statistics

Figure 2.2 Cycle Of National Defense Spending (2009 Dollars)									
Quarter	Billions	Quarter	Billions	Quarter	Billions	Quarter	Billions	Quarter	Billions
1975 Q1	$418.7	1982 Q2	$507.5	1989 Q3	$646.0	1996 Q4	$485.1	2004 Q1	$628.3
1975 Q2	$411.6	1982 Q3	$510.6	1989 Q4	$630.7	1997 Q1	$470.4	2004 Q2	$629.9
1975 Q3	$426.2	1982 Q4	$531.3	1990 Q1	$632.6	1997 Q2	$479.9	2004 Q3	$651.4
1975 Q4	$429.1	1983 Q1	$538.1	1990 Q2	$629.4	1997 Q3	$475.5	2004 Q4	$635.7
1976 Q1	$425.3	1983 Q2	$547.3	1990 Q3	$613.0	1997 Q4	$477.7	2005 Q1	$658.5
1976 Q2	$425.0	1983 Q3	$549.9	1990 Q4	$624.1	1998 Q1	$450.4	2005 Q2	$658.2
1976 Q3	$424.1	1983 Q4	$560.9	1991 Q1	$630.3	1998 Q2	$465.7	2005 Q3	$673.7
1976 Q4	$429.8	1984 Q1	$583.9	1991 Q2	$625.5	1998 Q3	$470.7	2005 Q4	$646.9
1977 Q1	$435.5	1984 Q2	$589.9	1991 Q3	$610.5	1998 Q4	$466.8	2006 Q1	$676.3
1977 Q2	$438.8	1984 Q3	$585.4	1991 Q4	$590.5	1999 Q1	$465.8	2006 Q2	$672.8
1977 Q3	$434.1	1984 Q4	$606.8	1992 Q1	$586.1	1999 Q2	$463.6	2006 Q3	$667.4
1977 Q4	$432.7	1985 Q1	$614.2	1992 Q2	$586.3	1999 Q3	$476.9	2006 Q4	$689.7
1978 Q1	$434.2	1985 Q2	$622.6	1992 Q3	$593.3	1999 Q4	$487.2	2007 Q1	$684.0
1978 Q2	$438.0	1985 Q3	$642.8	1992 Q4	$579.6	2000 Q1	$463.6	2007 Q2	$689.7
1978 Q3	$436.0	1985 Q4	$645.9	1993 Q1	$556.4	2000 Q2	$479.8	2007 Q3	$708.4
1978 Q4	$439.2	1986 Q1	$636.0	1993 Q2	$547.9	2000 Q3	$470.9	2007 Q4	$706.2
1979 Q1	$436.9	1986 Q2	$660.1	1993 Q3	$542.9	2000 Q4	$469.0	2008 Q1	$724.1
1979 Q2	$437.8	1986 Q3	$681.2	1993 Q4	$547.0	2001 Q1	$476.5	2008 Q2	$730.5
1979 Q3	$432.2	1986 Q4	$658.9	1994 Q1	$518.6	2001 Q2	$478.8	2008 Q3	$759.4
1979 Q4	$440.1	1987 Q1	$666.5	1994 Q2	$521.9	2001 Q3	$486.6	2008 Q4	$781.3
1980 Q1	$444.1	1987 Q2	$674.2	1994 Q3	$534.2	2001 Q4	$495.7	2009 Q1	$765.4
1980 Q2	$440.4	1987 Q3	$678.2	1994 Q4	$509.7	2002 Q1	$516.1	2009 Q2	$785.9
1980 Q3	$439.5	1987 Q4	$670.6	1995 Q1	$508.8	2002 Q2	$524.4	2009 Q3	$796.3
1980 Q4	$456.0	1988 Q1	$667.0	1995 Q2	$505.0	2002 Q3	$532.1	2009 Q4	$792.6
1981 Q1	$459.0	1988 Q2	$657.4	1995 Q3	$498.7	2002 Q4	$551.7	2010 Q1	$802.1
1981 Q2	$471.1	1988 Q3	$643.6	1995 Q4	$486.2	2003 Q1	$556.1	2010 Q2	$813.5
1981 Q3	$467.8	1988 Q4	$653.1	1996 Q1	$500.9	2003 Q2	$603.4	2010 Q3	$830.8
1981 Q4	$485.8	1989 Q1	$635.4	1996 Q2	$500.3	2003 Q3	$595.0		
1982 Q1	$493.4	1989 Q2	$638.5	1996 Q3	$489.4	2003 Q4	$609.5		

Sources: Bureau of Economic Analysis, Bureau of Labor Statistics, HRPDC

Figure 2.3 Inflation-Adjusted Department Of Defense Spending In Hampton Roads	
Year	Millions of Dollars
1994	$ 10,241
1995	$ 15,075
1996	$ 10,020
1997	$ 9,303
1998	$ 11,298
1999	$ 11,157
2000	$ 11,121
2001	$ 16,800
2002	$ 13,069
2003	$ 12,058
2004	$ 13,890
2005	$ 13,853
2006	$ 15,753
2007	$ 16,336
2008	$ 13,867
2009	$ 14,495

Source: Consolidated Federal Funds Report

Figure 2.4 Total Military Employment In Hampton Roads	
Year	Employment
1998	106,541
1999	108,382
2000	110,522
2001	110,148
2002	111,995
2003	113,193
2004	111,830
2005	108,269
2006	108,375
2007	106,300
2008	104,414

Source: Bureau of Economic Analysis

Figure 2.5 Inflation Adjusted Military Incomes	
Year	Billions of Dollars
1998	$6.98
1999	$7.15
2000	$7.40
2001	$7.61
2002	$8.38
2003	$8.92
2004	$9.48
2005	$9.47
2006	$10.08
2007	$10.18
2008	$10.04

Source: Bureau of Economic Analysis

Figure 2.6 Concentration Of Ship Building And Repair Employment In Hampton Roads	
Year	HR Share of National Employment
1999	11.2%
2000	12.6%
2001	13.0%
2002	13.6%
2003	14.1%
2004	14.5%
2005	14.1%
2006	14.1%
2007	14.2%
2008	14.6%
2009	17.5%

Source: Bureau of Labor Statistics

Figure 2.7 Total Ship Building And Repair Employment In Hampton Roads	
Year	Employment
1999	17,200
2000	19,400
2001	19,300
2002	20,100
2003	20,800
2004	21,600
2005	21,800
2006	22,200
2007	22,700
2008	22,800
2009	23,100

Source: Bureau of Labor Statistics

Figure 2.8 Distribution of Market Share For East Coast Container Ports	
Port	Market Share
New York/New Jersey	33.0%
Savannah	17.0%
Hampton Roads	12.6%
Charleston	8.5%
Miami	5.8%
Port Everglades	5.8%
Jacksonville	5.5%
Other	11.7%

Source: American Association of Port Authorities

Figure 2.9 Hampton Roads Market Share Of Imports & Exports At East Coast Ports		
Year	Value	Weight
2003	11.4%	9.6%
2004	11.1%	9.6%
2005	11.2%	9.8%
2006	10.9%	10.1%
2007	11.0%	12.4%
2008	10.7%	14.9%
2009	10.9%	15.4%

Source: Census Bureau's Foreign Trade Division

Figure 2.10 Foreign And Domestic Vessel Departures		
Year	American	Foreign
1994	407	2181
1995	322	2459
1996	344	2325
1997	290	2342
1998	219	2346
1999	240	2305
2000	323	2376
2001	197	2279
2002	182	1892
2003	212	2285
2004	218	2517
2005	250	2550
2006	219	2704
2007	222	2780
2008	236	2691
2009	269	2172

Source: Virginia Port Authority

Figure 2.11 General Cargo Imports & Exports (Short Tons)		
Year	Exports	Imports
1994	4,191,937	3,770,654
1995	5,111,799	3,974,419
1996	5,539,072	4,101,667
1997	6,085,257	4,663,576
1998	6,000,501	5,169,144
1999	6,093,460	5,719,588
2000	6,048,584	5,920,522
2001	5,916,152	5,630,328
2002	5,992,936	6,831,494
2003	6,668,908	7,314,709
2004	6,896,749	7,711,766
2005	7,373,355	8,590,662
2006	7,632,798	8,950,681
2007	9,155,856	8,610,395
2008	9,829,139	8,004,007
2009	8,458,851	6,449,641

Source: Virginia Port Authority

Figure 2.12 Coal Loadings	
Year	Thousands of Short Tons
1994	42,304,108
1995	51,145,891
1996	52,999,164
1997	53,459,811
1998	45,724,231
1999	32,944,738
2000	32,619,006
2001	27,831,820
2002	21,939,775
2003	20,865,282
2004	26,804,489
2005	24,903,074
2006	21,587,423
2007	28,340,278
2008	44,090,371
2009	31,898,482

Source: Virginia Port Authority

Figure 2.13 Hampton Roads Deseasonalized Taxable Hotel Sales

Month	Sales	Month	Sales	Month	Sales	Month	Sales
Jun-00	$ 45,646,084	Dec-02	$ 45,993,711	Jun-05	$ 52,641,077	Dec-07	$ 54,373,014
Jul-00	$ 43,830,300	Jan-03	$ 51,676,800	Jul-05	$ 54,337,756	Jan-08	$ 57,410,544
Aug-00	$ 43,587,847	Feb-03	$ 47,574,888	Aug-05	$ 53,628,271	Feb-08	$ 58,386,442
Sep-00	$ 46,279,782	Mar-03	$ 45,425,652	Sep-05	$ 53,769,936	Mar-08	$ 58,056,068
Oct-00	$ 45,292,631	Apr-03	$ 50,234,190	Oct-05	$ 52,646,880	Apr-08	$ 54,890,316
Nov-00	$ 46,127,787	May-03	$ 50,321,955	Nov-05	$ 53,777,193	May-08	$ 57,097,596
Dec-00	$ 44,929,670	Jun-03	$ 50,295,328	Dec-05	$ 56,337,637	Jun-08	$ 55,879,108
Jan-01	$ 42,516,201	Jul-03	$ 51,061,779	Jan-06	$ 56,542,363	Jul-08	$ 55,309,066
Feb-01	$ 43,864,784	Aug-03	$ 52,972,457	Feb-06	$ 56,365,529	Aug-08	$ 59,193,644
Mar-01	$ 44,024,771	Sep-03	$ 47,346,571	Mar-06	$ 55,715,471	Sep-08	$ 48,779,294
Apr-01	$ 44,250,880	Oct-03	$ 60,506,890	Apr-06	$ 56,069,364	Oct-08	$ 54,895,712
May-01	$ 44,821,150	Nov-03	$ 55,470,293	May-06	$ 54,463,711	Nov-08	$ 53,864,722
Jun-01	$ 44,962,629	Dec-03	$ 53,905,353	Jun-06	$ 55,236,760	Dec-08	$ 53,472,929
Jul-01	$ 45,637,163	Jan-04	$ 52,254,099	Jul-06	$ 54,304,090	Jan-09	$ 55,675,383
Aug-01	$ 45,898,210	Feb-04	$ 51,471,474	Aug-06	$ 54,825,461	Feb-09	$ 56,842,705
Sep-01	$ 40,272,518	Mar-04	$ 49,214,192	Sep-06	$ 56,723,873	Mar-09	$ 53,692,217
Oct-01	$ 43,777,911	Apr-04	$ 51,449,594	Oct-06	$ 54,384,991	Apr-09	$ 53,884,532
Nov-01	$ 46,409,252	May-04	$ 51,839,842	Nov-06	$ 57,010,128	May-09	$ 51,628,071
Dec-01	$ 46,997,821	Jun-04	$ 50,164,070	Dec-06	$ 55,234,428	Jun-09	$ 50,148,453
Jan-02	$ 47,610,298	Jul-04	$ 50,285,006	Jan-07	$ 57,963,563	Jul-09	$ 53,275,239
Feb-02	$ 49,115,307	Aug-04	$ 49,231,507	Feb-07	$ 57,971,635	Aug-09	$ 54,176,833
Mar-02	$ 53,969,436	Sep-04	$ 51,525,802	Mar-07	$ 60,017,939	Sep-09	$ 54,169,132
Apr-02	$ 49,777,467	Oct-04	$ 51,740,670	Apr-07	$ 61,080,504	Oct-09	$ 52,029,692
May-02	$ 49,210,590	Nov-04	$ 50,307,296	May-07	$ 60,992,513	Nov-09	$ 53,582,381
Jun-02	$ 50,044,458	Dec-04	$ 52,403,148	Jun-07	$ 60,881,314	Dec-09	$ 55,018,516
Jul-02	$ 49,066,258	Jan-05	$ 52,012,829	Jul-07	$ 56,254,440	Jan-10	$ 53,205,993
Aug-02	$ 50,142,380	Feb-05	$ 52,474,366	Aug-07	$ 58,908,729	Feb-10	$ 50,415,663
Sep-02	$ 46,980,649	Mar-05	$ 52,275,013	Sep-07	$ 58,156,903	Mar-10	$ 50,705,645
Oct-02	$ 48,957,345	Apr-05	$ 50,515,924	Oct-07	$ 61,636,706	Apr-10	$ 49,797,778
Nov-02	$ 46,530,228	May-05	$ 50,600,251	Nov-07	$ 59,731,994	May-10	$ 50,483,546

Sources: Virginia Department of Taxation, ODU Forecasting, HRPDC

Figure 2.14 Employment In The Hampton Roads Leisure And Hospitality Industry	
Year	Employment
1994	65,400
1995	67,900
1996	69,500
1997	71,700
1998	72,400
1999	72,900
2000	74,200
2001	76,200
2002	76,500
2003	76,400
2004	79,000
2005	82,000
2006	84,500
2007	85,900
2008	85,900
2009	83,800

Source: Bureau of Labor Statistics

Figure 2.15 Distribution Of Hampton Roads Construction Employment in 2009	
Sub Sector	Percent of
Building Equipment Contractors	30.8%
Heavy and Civil Engineering Construction	19.0%
Building Foundation/Exterior Contractors	12.5%
Building Finishing Contractors	10.9%
Nonresidential Building Construction	10.3%
Residential Building Construction	9.0%
Other Specialty Trade Contractors	7.5%

Source: Virginia Employment Commision

Figure 2.16 New Building Permits Issued In Hampton Roads					
Year	Total	1 Unit	2 Units	3 & 4 Units	5 Units and More
1994	8,887	7,227	144	139	1,377
1995	8,648	6,227	176	427	1,818
1996	8,314	6,543	170	180	1,421
1997	7,581	6,256	74	149	1,102
1998	8,508	7,077	58	157	1,216
1999	8,988	7,478	20	106	1,384
2000	7,429	6,499	42	204	684
2001	8,716	7,089	54	54	1,519
2002	10,159	7,632	100	72	2,355
2003	10,353	7,850	78	133	2,292
2004	10,186	7,294	350	203	2,339
2005	11,360	7,667	330	278	2,075
2006	7,689	5,880	198	452	1,437
2007	6,276	4,519	112	164	1,583
2008	5,114	3,246	60	32	1,776
2009	5,223	2,887	64	7	2,265

Source: U.S. Census Bureau

Figure 2.17 Value Of New Building Permits Issued In Hampton Roads (Millions of Dollars)					
Year	Total	1 Unit	2 Units	3 & 4 Units	5 Units and More
1994	$ 748	$ 702	$ 7	$ 6	$ 33
1995	$ 714	$ 641	$ 8	$ 11	$ 54
1996	$ 747	$ 679	$ 9	$ 11	$ 47
1997	$ 781	$ 725	$ 7	$ 7	$ 41
1998	$ 874	$ 787	$ 7	$ 10	$ 70
1999	$ 935	$ 857	$ 1	$ 8	$ 69
2000	$ 909	$ 859	$ 3	$ 14	$ 34
2001	$ 1,014	$ 911	$ 5	$ 3	$ 96
2002	$ 1,143	$ 1,037	$ 8	$ 5	$ 93
2003	$ 1,295	$ 1,161	$ 6	$ 10	$ 118
2004	$ 1,453	$ 1,226	$ 30	$ 16	$ 181
2005	$ 1,440	$ 1,257	$ 27	$ 19	$ 136
2006	$ 1,240	$ 1,035	$ 19	$ 34	$ 92
2007	$ 994	$ 853	$ 10	$ 16	$ 115
2008	$ 771	$ 624	$ 8	$ 2	$ 136
2009	$ 666	$ 549	$ 7	$ 1	$ 109

Source: U.S. Census Bureau

Figure 2.18 Construction Employment In Hampton Roads	
Year	Employment
1999	42,012
2000	43,275
2001	45,259
2002	44,083
2003	44,858
2004	47,667
2005	49,109
2006	48,592
2007	46,984
2008	44,350
2009	37,531

Source: Virginia Employment Commision

Figure 2.19 Inflation Adjusted Taxable Sales In Hampton Roads	
Year	Taxable Sales
1994	$ 15,916,566,725
1995	$ 16,443,054,209
1996	$ 16,618,245,275
1997	$ 17,046,549,806
1998	$ 17,321,263,586
1999	$ 17,975,622,118
2000	$ 18,136,238,203
2001	$ 17,989,898,783
2002	$ 18,373,621,216
2003	$ 19,048,618,262
2004	$ 20,133,240,094
2005	$ 20,727,513,566
2006	$ 21,168,495,087
2007	$ 21,274,368,499
2008	$ 19,687,425,746
2009	$ 18,787,464,300

Source: Virginia Department of Taxation

Figure 2.20 Distribution Of Hampton Roads Retail Employment	
Sector	Percent of Retail Employment
General Merchandise Stores	24.7%
Food and Beverage Stores	15.5%
Motor Vehicle and Parts Dealers	12.2%
Clothing and Clothing Accessories Stores	9.4%
Gasoline Stations	7.4%
Building Material & Garden Supply Stores	6.3%
Miscellaneous Store Retailers	5.7%
Health and Personal Care Stores	5.3%
Other	13.5%

Source: Virginia Employment Commision

Figure 3.1 Population Of Hampton Roads And Competing Metro Areas In 2007	
Metro Area	Population
Washington D.C.	5,476,241
Atlanta	5,475,213
Tampa-St. Petersburg	2,747,272
Baltimore	2,690,886
Orlando	2,082,421
Charlotte	1,745,524
Hampton Roads	1,674,498
Jacksonville	1,328,144
Richmond	1,238,187
Raleigh-Cary	1,125,827
Greensboro-High Point	714,765
Charleston	659,191
Greenville-Mauldlin	639,617
Roanoke	300,399
Charlottesville	196,766

Source: U.S. Census Bureau

Figure3.2 Population Growth Rates In Hampton Roads And The United States		
Year	Hampton Roads	United States
1994	1.13%	1.23%
1995	0.45%	1.20%
1996	0.23%	1.17%
1997	0.64%	1.21%
1998	0.23%	1.18%
1999	0.80%	1.15%
2000	0.83%	1.12%
2001	0.74%	1.03%
2002	0.59%	0.95%
2003	0.72%	0.88%
2004	1.52%	0.94%
2005	0.65%	0.92%
2006	0.27%	0.96%
2007	0.39%	1.00%
2008	0.55%	0.93%
2009	0.57%	0.86%

Sources: Weldon Cooper Center, U.S. Census Bureau

Figure 3.3 Hampton Roads Population Density	
Year	Persons Per Square Mile
1994	524.9
1995	527.2
1996	528.4
1997	531.8
1998	533.0
1999	537.3
2000	541.8
2001	545.8
2002	549.0
2003	553.0
2004	561.4
2005	565.1
2006	566.6
2007	568.8
2008	571.9
2009	575.2

Source: Weldon Cooper Center

Figure 3.4 Components Of Population Change In Hampton Roads			
Year	Births	Deaths	Net Migration
1993	26,176	11,146	20
1994	25,290	11,069	(2,321)
1995	24,094	11,568	(7,376)
1996	23,392	11,400	(5,342)
1997	22,737	11,420	(4,617)
1998	23,186	11,683	(3,503)
1999	22,968	11,977	1,718
2000	23,465	11,911	817
2001	23,047	11,964	(537)
2002	23,114	12,251	(399)
2003	23,359	12,370	6,995
2004	24,264	12,155	5,423
2005	23,885	12,029	(4,279)
2006	24,398	12,122	(6,831)
2007	24,437	12,543	(4,165)
2008	23,842	12,378	(2,192)

Sources: Virginia Department of Health
Weldon Cooper Center

Figure 3.5 Age Distribution Of The Hampton Roads Population			
Year	Ages 0-19	Ages 20-64	Ages 65+
1990	438,339	888,082	133,986
1991	438,354	896,429	137,754
1992	446,964	916,812	141,529
1993	452,663	928,184	144,988
1994	455,420	931,247	148,144
1995	457,239	933,910	151,095
1996	458,873	936,152	154,150
1997	460,009	937,483	156,500
1998	461,593	932,957	158,957
1999	463,151	939,588	160,853
2000	464,885	950,612	163,075
2001	462,975	956,285	165,513
2002	467,501	967,056	167,760
2003	473,868	977,023	170,264
2004	475,439	990,320	172,675
2005	474,796	993,123	175,682
2006	473,470	1,003,077	179,109
2007	469,261	1,001,534	183,311
2008	475,325	994,025	188,857
2009	473,962	984,389	193,271
2010	468,389	973,723	197,278

Source: Regional Economic Modeling, Inc.

Figure 3.6 Gender Distribution For The Hampton Roads		
Year	Males	Females
1990	732,568	727,839
1991	736,718	735,819
1992	752,862	752,443
1993	760,906	764,929
1994	762,711	772,100
1995	764,668	777,576
1996	766,477	782,698
1997	767,512	786,480
1998	765,673	787,834
1999	770,253	793,339
2000	777,740	800,832
2001	780,355	804,418
2002	787,764	814,553
2003	792,741	828,414
2004	802,282	836,152
2005	802,735	840,865
2006	811,396	844,260
2007	809,583	844,523
2008	811,123	847,084
2009	807,852	843,771
2010	802,010	837,380

Source: Regional Economic Modeling, Inc.

Figure 3.7 Race And Ethnicity In Hampton Roads				
Year	Caucasian	African	Other	Hispanic
1990	968,696	420,974	38,031	32,706
1991	969,883	429,511	39,548	33,595
1992	983,276	445,070	41,969	34,990
1993	989,604	456,022	43,793	36,416
1994	988,570	463,851	44,959	37,431
1995	984,790	471,877	46,542	39,035
1996	980,843	479,252	48,163	40,917
1997	975,446	485,909	49,832	42,805
1998	966,306	491,631	51,200	44,370
1999	964,522	499,352	53,291	46,427
2000	955,930	497,082	76,215	49,345
2001	956,013	499,556	77,574	51,630
2002	962,123	505,517	79,810	54,867
2003	969,805	511,951	82,048	57,351
2004	976,404	516,770	84,055	61,205
2005	973,897	520,233	85,502	63,968
2006	975,613	525,005	87,377	67,661
2007	969,696	525,967	88,957	69,486
2008	968,547	526,311	90,440	72,908
2009	960,993	525,778	90,765	74,087
2010	950,029	524,688	90,498	74,175

Source: Regional Economic Modeling, Inc

Figure 3.8 Distribution Of Occupations In Hampton Roads	
Occupation	Percent of Total
Office and administrative support occupations	16.5%
Sales and related occupations	10.5%
Food preparation and serving related occupations	9.6%
Transportation and material moving occupations	6.7%
Education, training, and library occupations	6.7%
Business and financial operations occupations	5.5%
Construction and extraction occupations	5.4%
Production occupations	5.1%
Healthcare practitioner and technical occupations	5.1%
Other	29.1%

Source: Bureau of Labor Statistics

Figure 4.1 Deseasonalized Pre-Owned And New Construction Home Sales In Hampton Roads								
Month	New Construction	Resales	Month	New Construction	Resales	Month	New Construction	Resales
Jan-01	379	1268	Apr-04	521	1918	Jul-07	345	1539
Feb-01	420	1516	May-04	419	1803	Aug-07	311	1514
Mar-01	408	1608	Jun-04	417	1930	Sep-07	312	1242
Apr-01	475	1495	Jul-04	425	1959	Oct-07	336	1382
May-01	508	1564	Aug-04	439	1979	Nov-07	326	1358
Jun-01	419	1554	Sep-04	502	2118	Dec-07	316	1287
Jul-01	409	1528	Oct-04	446	2058	Jan-08	309	1442
Aug-01	478	1626	Nov-04	410	2114	Feb-08	376	1201
Sep-01	448	1490	Dec-04	410	2059	Mar-08	342	1257
Oct-01	318	1580	Jan-05	451	1975	Apr-08	343	1333
Nov-01	494	1589	Feb-05	377	2020	May-08	258	1247
Dec-01	490	1503	Mar-05	511	2041	Jun-08	268	1183
Jan-02	383	1694	Apr-05	409	1941	Jul-08	261	1243
Feb-02	472	1620	May-05	413	1999	Aug-08	247	1207
Mar-02	427	1561	Jun-05	451	2012	Sep-08	258	1153
Apr-02	390	1627	Jul-05	435	1944	Oct-08	231	1092
May-02	390	1638	Aug-05	445	2094	Nov-08	226	906
Jun-02	395	1525	Sep-05	416	2047	Dec-08	234	1054
Jul-02	503	1573	Oct-05	350	1966	Jan-09	205	1037
Aug-02	424	1578	Nov-05	422	2098	Feb-09	201	1170
Sep-02	425	1604	Dec-05	438	2104	Mar-09	199	1148
Oct-02	453	1760	Jan-06	387	1935	Apr-09	199	1133
Nov-02	468	1681	Feb-06	433	2012	May-09	210	1150
Dec-02	373	1846	Mar-06	401	2059	Jun-09	226	1246
Jan-03	512	1863	Apr-06	412	1910	Jul-09	245	1313
Feb-03	396	1769	May-06	447	1957	Aug-09	251	1279
Mar-03	378	1653	Jun-06	507	1874	Sep-09	220	1389
Apr-03	394	1659	Jul-06	373	1695	Oct-09	239	1635
May-03	401	1648	Aug-06	400	1718	Nov-09	321	1680
Jun-03	405	1659	Sep-06	395	1687	Dec-09	219	1336
Jul-03	379	1843	Oct-06	384	1692	Jan-10	140	1138
Aug-03	363	1776	Nov-06	325	1664	Feb-10	161	1244
Sep-03	345	1710	Dec-06	373	1775	Mar-10	195	1276
Oct-03	405	2023	Jan-07	396	1859	Apr-10	216	1473
Nov-03	443	1537	Feb-07	351	1911	May-10	241	1360
Dec-03	437	1787	Mar-07	444	1743	Jun-10	307	1287
Jan-04	505	1739	Apr-07	312	1660	Jul-10	208	919
Feb-04	504	1743	May-07	354	1620	Aug-10	201	1034
Mar-04	500	1736	Jun-07	340	1576	Sep-10	207	1024

Source: Rose and Womble Realty

Figure 4.2 % Change in Housing Price Indices For Hampton Roads, The South Atlantic Region, And The United States							
Quarter	Hampton Roads	South Atlantic Division	United States	Quarter	Hampton Roads	South Atlantic Division	United States
1995 Q1	-0.60%	-0.94%	1.18%	2003 Q1	7.79%	8.50%	6.64%
1995 Q2	0.97%	0.69%	2.42%	2003 Q2	7.59%	7.33%	6.10%
1995 Q3	3.25%	2.14%	3.61%	2003 Q3	7.89%	7.05%	5.55%
1995 Q4	3.39%	2.61%	4.61%	2003 Q4	11.82%	9.77%	6.96%
1996 Q1	5.07%	4.36%	5.45%	2004 Q1	13.41%	10.90%	7.43%
1996 Q2	2.85%	2.52%	3.80%	2004 Q2	16.91%	13.23%	8.74%
1996 Q3	0.86%	0.69%	2.67%	2004 Q3	22.18%	17.57%	11.03%
1996 Q4	1.45%	1.24%	2.72%	2004 Q4	21.04%	16.94%	10.46%
1997 Q1	1.27%	0.75%	2.43%	2005 Q1	22.64%	18.58%	11.20%
1997 Q2	1.79%	1.26%	3.10%	2005 Q2	24.67%	20.63%	11.90%
1997 Q3	2.74%	2.91%	4.15%	2005 Q3	22.66%	18.91%	11.18%
1997 Q4	3.17%	3.09%	4.61%	2005 Q4	22.64%	18.21%	11.15%
1998 Q1	3.39%	3.27%	5.22%	2006 Q1	21.24%	16.43%	10.42%
1998 Q2	3.67%	3.53%	5.16%	2006 Q2	16.58%	12.38%	8.03%
1998 Q3	3.61%	3.14%	5.09%	2006 Q3	12.23%	8.08%	5.72%
1998 Q4	3.22%	3.00%	4.97%	2006 Q4	9.67%	6.51%	4.73%
1999 Q1	2.05%	3.08%	4.41%	2007 Q1	6.96%	4.50%	3.55%
1999 Q2	2.96%	3.78%	4.98%	2007 Q2	4.89%	2.90%	2.61%
1999 Q3	2.71%	4.76%	5.04%	2007 Q3	3.10%	1.15%	0.89%
1999 Q4	2.92%	5.13%	4.90%	2007 Q4	1.55%	-0.35%	-0.27%
2000 Q1	3.30%	5.88%	5.93%	2008 Q1	0.63%	-0.98%	-0.95%
2000 Q2	3.81%	6.78%	6.25%	2008 Q2	-1.87%	-3.75%	-2.80%
2000 Q3	4.51%	6.90%	6.68%	2008 Q3	-2.98%	-4.91%	-4.38%
2000 Q4	4.38%	7.34%	7.23%	2008 Q4	-3.66%	-5.21%	-4.74%
2001 Q1	6.16%	8.31%	7.87%	2009 Q1	-3.80%	-4.49%	-3.68%
2001 Q2	5.66%	8.65%	7.93%	2009 Q2	-4.14%	-4.19%	-4.06%
2001 Q3	6.00%	9.10%	7.61%	2009 Q3	-4.59%	-3.97%	-4.05%
2001 Q4	6.56%	8.82%	7.29%	2009 Q4	-5.23%	-4.09%	-4.33%
2002 Q1	5.68%	8.16%	6.11%	2010 Q1	-5.90%	-6.24%	-6.49%
2002 Q2	6.90%	8.62%	6.14%	2010 Q2	-4.91%	-4.33%	-4.64%
2002 Q3	7.63%	9.03%	6.69%	2010 Q3	-2.59%	-1.66%	-1.19%
2002 Q4	7.61%	9.03%	6.88%				

Figure 4.3 Housing Price Increases In Hampton Roads And Competing Metro Areas From 2006 To 2009	
Metro Area	Increase in Price
Raleigh-Cary, NC	0.7%
Charlotte	-0.8%
Richmond, VA	-7.6%
Charleston	-9.3%
Baltimore	-10.3%
Hampton Roads	-10.8%
Greensboro	-11.1%
U.S.	-22.4%
Jacksonville	-24.4%
Atlanta	-28.1%
Washington DC	-28.4%
Orlando	-45.5%

Source: National Association of Realtors

Figure 4.4 Home Ownership Rates In Hampton Roads	
Year	Home Ownership Rate
1994	64.7%
1995	62.5%
1996	65.6%
1997	61.8%
1998	63.8%
1999	64.2%
2000	70.1%
2001	71.5%
2002	74.9%
2003	79.6%
2004	73.2%
2005	68.0%
2006	68.3%
2007	66.0%
2008	63.9%
2009	63.5%

Source: U.S. Census Bureau

Figure 4.5 Hampton Roads Housing Opportunity Index			
Quarter	Index	Quarter	Index
2000 Q1	70.0	2005 Q3	51.9
2000 Q2	67.9	2005 Q4	51.0
2000 Q3	65.0	2006 Q1	52.6
2000 Q4	71.3	2006 Q2	44.8
2001 Q1	74.6	2006 Q3	40.3
2001 Q2	70.9	2006 Q4	46.0
2001 Q3	70.0	2007 Q1	49.5
2001 Q4	75.3	2007 Q2	48.5
2002 Q1	75.5	2007 Q3	46.7
2002 Q2	No Data	2007 Q4	50.1
2002 Q3	No Data	2008 Q1	56.5
2002 Q4	No Data	2008 Q2	51.7
2003 Q1	No Data	2008 Q3	50.4
2003 Q2	No Data	2008 Q4	64.1
2003 Q3	No Data	2009 Q1	74.9
2003 Q4	69.8	2009 Q2	72.9
2004 Q1	70.8	2009 Q3	68.4
2004 Q2	68.3	2009 Q4	72.9
2004 Q3	64.5	2010 Q1	76.9
2004 Q4	62.7	2010 Q2	75.4
2005 Q1	62.9	2010 Q3	77.5
2005 Q2	57.7		

Source: National Association of Home Builders

Figure 4.6 Housing Affordability In Hampton Roads		
Year	Hourly Wage Needed to Rent a Two Bedroom Apartment in HR	Hourly Wage as a Percent of Minimum Wage
1999	11.08	215%
2000	11.27	219%
2001	12.54	243%
2002	14.29	277%
2003	14.38	279%
2004	15.15	294%
2005	15.6	303%
2006	16.23	315%
2007	17.38	297%
2008	17.38	297%
2009	17.38	265%

Source: National Low Income Housing Coalition

Figure 5.1 Per Capita Daily Vehicle Miles Traveled In Hampton Roads	
Year	Daily VMT/Capita
1994	21.4
1995	21.6
1996	22.4
1997	19.9
1998	22.5
1999	24.4
2000	23.0
2001	22.7
2002	23.3
2003	22.9
2004	23.7
2005	23.4
2006	23.2
2007	23.5
2008	23.8

Source: Federal Highway Administration

Figure 5.2 Per Capita Daily Vehicle Miles Traveled In Hampton Roads And Competing Metro Areas	
Metro Area	Daily VMT/Capita
Raleigh-Durham	33.5
Charlotte	32.2
Jacksonville	31.2
Orlando	30.9
Greensboro- Winston-Salem	28.9
Greenville	28.3
Richmond	28.2
Atlanta	27.9
Tampa-St. Petersburg	27.0
Charleston-North Charleston	25.1
Baltimore	23.9
Roanoke	23.9
Hampton Roads	23.8
Charlottesville	23.0
Washington	22.6

Source: Federal Highway Administration

Figure 5.3 Inrix Travel Time Tax	
Durisdiction	Travel Time Tax
Washington, DC	22.4%
Hampton Roads	11.3%
Atlanta	10.6%
Baltimore	10.4%
Tampa/St. Pete	8.0%
Charlotte	6.3%
Charleston	4.7%
Orlando	4.4%
Raleigh Durham	4.0%
Jacksonville	3.9%
Greenville	2.4%
Greensboro/W-S	1.4%
Richmond	1.4%

Source: INRIX, Inc

Figure 5.4 Delay Per Peak Period Traveler For Hampton Roads And Competing Regions In 2007

Urban Area	Annual Delay Per Traveler, 2007
Washington, DC/MD/VA	62
Atlanta, GA	57
Orlando, FL	53
Tampa-St. Petersburg, FL	47
Baltimore, MD	44
Charlotte, NC/SC	40
Jacksonville, FL	39
Charleston-North Charleston, SC	38
Raleigh-Durham, NC	34
Hampton Roads	29
Richmond, VA	20

Source: Texas Transportation Institute

Figure 5.5 Delay Per Peak Period Traveler In Hampton Roads

Year	Hampton Roads	Large Urban Area Average
1996	30.0	30.0
1997	31.0	31.0
1998	32.0	32.0
1999	33.0	33.0
2000	32.5	34.0
2001	32.0	35.0
2002	32.0	35.0
2003	31.0	35.0
2004	30.0	36.0
2005	30.0	37.0
2006	30.0	36.0
2007	29.0	35.0

Source: Texas Transportation Institute

Figure 5.6 Hampton Roads Congestion And Congestion Costs

Year	Millions of Dollars	Annual Hours of Delay (000's)
1990	$ 156	12,696
1991	$ 154	11,991
1992	$ 160	12,202
1993	$ 173	12,877
1994	$ 216	15,636
1995	$ 259	18,070
1996	$ 306	20,705
1997	$ 329	21,847
1998	$ 356	23,629
1999	$ 386	25,196
2000	$ 364	22,303
2001	$ 423	25,468
2002	$ 435	26,130
2003	$ 436	25,563
2004	$ 446	25,091
2005	$ 478	25,451
2006	$ 510	25,906
2007	$ 501	24,665

Source: Texas Transportation Institute

Figure 5.7 Hampton Roads Traffic Accidents

Year	Injuries	Crashes	Fatalities
1995	20,504	29,783	139
1996	19,963	29,954	141
1997	19,531	29,553	146
1998	19,155	29,666	165
1999	19,011	30,462	130
2000	17,860	29,432	132
2001	17,563	29,393	153
2002	17,785	31,442	136
2003	18,065	33,047	129
2004	17,815	33,108	131
2005	16,999	32,629	139
2006	16,026	32,019	141
2007	14,494	30,276	155
2008	14,465	27,599	153
2009	14,004	24,005	124

Source: Virginia Department of Motor Vehicles

Figure 5.8 Hampton Roads Vehicle Registrations			
Year	Population	Licensed Drivers	Registered Vehicles
1993	1,508,800	999,351	1,054,301
1994	1,525,800	1,003,585	1,087,907
1995	1,532,600	1,006,359	1,107,876
1996	1,536,100	1,015,005	1,137,807
1997	1,545,900	1,021,590	1,147,227
1998	1,549,500	978,401	1,167,361
1999	1,561,900	997,468	1,202,672
2000	1,575,348	1,002,643	1,244,998
2001	1,584,200	1,006,433	1,281,810
2002	1,591,000	1,023,995	1,317,220
2003	1,600,300	1,039,634	1,355,215
2004	1,622,800	1,053,065	1,398,328
2005	1,632,610	1,066,382	1,439,344
2006	1,636,514	1,073,176	1,459,511
2007	1,641,673	1,078,411	1,487,396
2008	1,651,250	1,080,528	1,489,584
2009	1,661,489	1,079,710	1,480,500

Sources: Virginia Department of Motor Vehicles, Weldon Cooper Center

Figure 5.9 Transit Passenger Miles In Hampton Roads (000's)	
Year	Transit Passenger Miles
1994	67,642
1995	69,808
1996	70,316
1997	75,395
1998	82,390
1999	88,090
2000	95,426
2001	93,622
2002	81,970
2003	87,433
2004	93,252
2005	107,836
2006	109,111
2007	103,014
2008	117,881
2009	107,056

Source: Federal Transit Administration

Figure 5.10 Transit Passenger Miles In Hampton Roads And Competing Metro Areas	
Metro Area	Transit Passenger Miles Per Capita
Washington	446.6
Baltimore	262.8
Atlanta	170.1
Orlando	78.4
Charlotte	64.1
Hampton Roads	62.1
Raleigh	51.4
Jacksonville	49.1
Tampa	48.2
Richmond	48.6
Charlottesville	36.2
Roanoke	34.6
Charleston	26.1
Greensboro	18.5
Greenville, SC	7.6

Sources: Federal Transit Administration
U.S. Census Bureau

Figure 5.11 Airport Enplanements At Hampton Roads Major Airports		
Year	Newport News - Williamsburg International Airport	Norfolk International Airport
1990	149,978	1,345,571
1991	154,331	1,266,060
1992	157,168	1,261,896
1993	153,460	1,320,542
1994	166,786	1,721,333
1995	181,971	1,335,378
1996	171,367	1,394,658
1997	158,502	1,440,680
1998	157,647	1,450,994
1999	217,047	1,494,396
2000	227,635	1,518,552
2001	206,750	1,478,687
2002	293,181	1,731,105
2003	360,018	1,722,999
2004	450,943	1,892,016
2005	514,361	1,953,003
2006	513,367	1,862,325
2007	513,381	1,867,307
2008	504,311	1,786,594
2009	498,205	1,701,246

Source: Federal Aviation Administration

Figure 5.12 Enplanement Trend In Hampton Roads Compared To The National Enplanement Trend		
Year	Regional Boardings	National Boardings
1990	1,495,549	495,005,528
1991	1,420,391	485,046,484
1992	1,419,064	510,681,119
1993	1,474,002	525,675,232
1994	1,888,119	570,346,146
1995	1,517,349	584,688,039
1996	1,566,025	619,795,370
1997	1,599,182	640,188,563
1998	1,608,641	643,300,000
1999	1,711,443	682,614,094
2000	1,746,187	708,638,875
2001	1,685,437	659,422,828
2002	2,024,286	643,776,534
2003	2,083,017	650,808,785
2004	2,342,959	702,997,034
2005	2,467,364	734,681,934
2006	2,375,692	738,364,097
2007	2,380,688	761,503,056
2008	2,290,886	735,032,434
2009	2,199,451	695,911,762

Source: Federal Aviation Administration

Figure 6.1 Hampton Roads Cost Of Living Index	
Category	Index
Housing	120.6
Misc. Goods and Services	112.0
Composite	**110.6**
Health Care	108.3
Grocery	106.4
Utilities	100.9
Transportation	96.4

Source: Council for Community and Economic Research

Figure 6.2 Revenue Sources Per Capita For Local Governments In Hampton Roads (2009 Dollars)					
Year	Real Property Tax	Personal Property Tax	Non-Tax Revenue	Local Sales and Use Tax	Other Local Taxes
1999	$ 633	$ 191	$ 260	$ 112	$ 431
2000	$ 643	$ 175	$ 256	$ 114	$ 436
2001	$ 651	$ 138	$ 249	$ 113	$ 498
2002	$ 680	$ 124	$ 277	$ 113	$ 462
2003	$ 713	$ 130	$ 265	$ 114	$ 477
2004	$ 741	$ 139	$ 289	$ 120	$ 488
2005	$ 787	$ 142	$ 290	$ 123	$ 486
2006	$ 841	$ 167	$ 327	$ 121	$ 543
2007	$ 936	$ 171	$ 331	$ 126	$ 538
2008	$ 961	$ 177	$ 338	$ 118	$ 532
2009	$ 997	$ 173	$ 316	$ 116	$ 530

Source: Auditor of Public Accounts

Figure 6.3 Per Capita Property Tax Collections In Hampton Roads (2009 Dollars)		
Year	Real Property Tax	Personal Property Tax
1994	$ 591	$ 169
1995	$ 591	$ 185
1996	$ 602	$ 201
1997	$ 612	$ 210
1998	$ 636	$ 224
1999	$ 633	$ 191
2000	$ 643	$ 175
2001	$ 651	$ 138
2002	$ 680	$ 124
2003	$ 713	$ 130
2004	$ 741	$ 139
2005	$ 787	$ 142
2006	$ 841	$ 167
2007	$ 936	$ 171
2008	$ 961	$ 177
2009	$ 997	$ 173

Source: Auditor of Public Accounts

Figure 6.4 Per Capita Local Governments Expenditures In Hampton Roads (2009 Dollars)					
Year	Education	Public Safety	Public Works	Health and Welfare	Other
1999	$ 1,410	$ 398	$ 226	$ 280	$ 330
2000	$ 1,462	$ 417	$ 227	$ 273	$ 349
2001	$ 1,473	$ 430	$ 225	$ 268	$ 356
2002	$ 1,482	$ 454	$ 230	$ 288	$ 367
2003	$ 1,512	$ 461	$ 226	$ 293	$ 379
2004	$ 1,540	$ 469	$ 274	$ 294	$ 421
2005	$ 1,606	$ 486	$ 224	$ 310	$ 400
2006	$ 1,625	$ 506	$ 238	$ 313	$ 419
2007	$ 1,727	$ 520	$ 243	$ 326	$ 448
2008	$ 1,652	$ 520	$ 249	$ 330	$ 446
2009	$ 1,751	$ 540	$ 258	$ 340	$ 470

Source: Auditor of Public Accounts

Figure 6.5 Real Per Capita Local Government Expenditures In Hampton Roads And Virginia		
Year	Hampton Roads	Virginia Average
1999	$ 2,633.54	$ 2,482.64
2000	$ 2,718.22	$ 2,581.40
2001	$ 2,742.43	$ 2,626.46
2002	$ 2,810.63	$ 2,715.12
2003	$ 2,860.56	$ 2,723.50
2004	$ 2,986.17	$ 2,849.29
2005	$ 3,015.70	$ 2,916.28
2006	$ 3,089.52	$ 2,971.25
2007	$ 3,252.70	$ 3,132.10
2008	$ 3,185.51	$ 3,187.70
2009	$ 3,346.35	$ 3,225.79

Source: Auditor of Public Accounts

Figure 6.6 Distribution Of Education Financing For Hampton Roads Jurisdictions In FY 2009	
Source	Percent of Total
Local	35.9%
Retail Sales & Use Tax	8.9%
State	46.3%
Federal	8.8%

Source: Virginia Department of Education

Figure 6.7 Real Per Pupil Expenditures in Hampton Roads And Virginia		
Year	Hampton Roads	Virginia
2000	$ 8,056.48	$ 8,701.42
2001	$ 8,580.55	$ 9,263.53
2002	$ 8,650.79	$ 9,344.11
2003	$ 8,779.42	$ 9,544.49
2004	$ 9,000.75	$ 9,712.59
2005	$ 9,452.35	$ 10,108.05
2006	$ 9,689.39	$ 10,380.85
2007	$ 10,450.92	$ 10,950.85
2008	$ 10,545.01	$ 10,997.52
2009	$ 10,880.32	$ 11,316.00

Source: Virginia Department of Education

Figure 6.8 Graduation Rates In Hampton Roads And Virginia		
Year	Hampton Roads	Virginia
2000	68.5%	76.0%
2001	68.4%	77.6%
2002	65.5%	75.7%
2003	70.4%	78.7%
2004	67.7%	76.3%
2005	67.4%	76.7%
2006	68.2%	76.4%
2007	64.5%	73.6%
2008	66.3%	75.5%
2008**	78.5%	82.2%
2009**	80.4%	83.2%
2010**	81.7%	85.5%

**From the new Logitudinal Study

Source: Virginia Department of Education

Figure 6.9 Number of Enrolled Students at Regional Universities In Fall 2009	
Institution	Enrollment
Old Dominion University	24,013
College of William and Mary	7,874
Norfolk State University	6,993
Hampton University	5,402
Christopher Newport University	4,952
Regent University	4,850
Virginia Wesleyan University	1,336
Eastern Virginia Medical School	827

Source: State Council for Higher Education

Figure 6.10 Violent Crime Rate In Hampton Roads		
Year	Hampton Roads	United States
2001	434.8	504.5
2002	463.1	494.4
2003	434.9	475.0
2004	429.3	465.5
2005	470.3	469.2
2006	462.3	473.5
2007	439.9	466.9
2008	425.5	454.5

Source: Federal Bureau of Investigation

Figure 6.11 Poverty Rates For Hampton Roads And The United States		
Year	Hampton Roads	United States
1998	12.1%	12.7%
1999	10.4%	11.9%
2000	10.2%	11.3%
2001	10.1%	11.7%
2002	11.1%	12.1%
2003	11.4%	12.5%
2004	10.8%	12.7%
2005	10.6%	13.3%
2006	9.9%	13.3%
2007	10.4%	13.0%
2008	10.6%	13.2%

Source: U.S. Census Bureau

Figure 6.12 Hampton Roads Air Quality In 2009	
Pollutant	Percent of Primary Standard
Ozone	88.0%
Carbon Monoxide	18.9%
Sulphur Dioxide	15.6%
Nitrogen Dioxide	10.0%

Source: Virginia Department of Environmental Quality

Figure 6.13 Ozone Levels In Hampton Roads	
Year	Ozone Parts Per Billion- 3 Year Average
1997	135
1999	99
2000	100
2001	102
2002	83
2003	75
2004	78
2005	77
2006	78
2007	79
2008	66

Source: Virginia Department of Environmental Quality

Figure 6.14 Gross Leasable Retail Space In Hampton Roads		
Year	Gross Leasable Area	Vacancy Rate
2000	44,066,000	11.2%
2001	43,914,485	13.1%
2002	44,666,973	12.8%
2003	45,726,776	11.6%
2004	46,430,427	11.2%
2005	45,954,173	9.4%
2006	47,189,668	7.5%
2007	49,302,916	6.8%
2008	50,219,239	7.6%
2009	50,377,040	7.7%
2010	51,696,243	9.9%

Source: Old Dominion University
Center for Real Estate and Economic Development

Figure 6.15 Hampton Roads Industrial Market Vacancy Rate	
Year	Industrial Market Vacancy Rate
1999	7.30%
2000	7.60%
2001	6.40%
2002	7.40%
2003	7.50%
2004	5.99%
2005	6.13%
2006	5.20%
2007	5.87%
2008	10.51%
2009	11.10%

Source: Old Dominion University
Center for Real Estate and Economic Development

Figure 6.16 Number Of Patents Issued In Hampton Roads	
Year	Number of Patents
1994	35
1995	20
1996	35
1997	39
1998	50
1999	52
2000	52
2001	55
2002	49
2003	57
2004	56
2005	57
2006	52
2007	61
2008	75
2009	51

Source: U.S. Patent and Trademark Office

Full Description of American Community Survey Categories

Median Age
% of the Total Population Who Are 65 Years and Over
% of the Total Population Who Are Black or African American Alone
% of the Total Population Who Are White Alone, Not Hispanic or Latino
% of People Who Are Foreign Born
% of People 1 Year and Over Who Lived in a Different House 1 Year Ago
Mean Travel Time to Work
% Who Traveled to Work by Public Transportation
% Who Worked Outside County of Residence
% of Households With One or More People Under 18 Years
Average Household Size
Ratio of Unmarried Men 15 to 44 Years per 100 Unmarried Women 15 to 44 Years
Women 15 to 50 Years Old Who Had a Birth in the Past 12 Months (Per 1,000 Women)
% of People 25 Years and Over Who Have Completed High School
% of People 25 Years and Over Who Have Completed a Bachelor's Degree
% of People 25 Years and Over Who Have Completed an Advanced Degree
% of People 5 Years and Over Who Speak a Language Other Than English at Home
% of People Below Poverty Level in the Past 12 Months
% of Children Under 18 Years Below Poverty Level in the Past 12 Months
% of People With a Disability (Noninstitutionalized)
% of the Civilian Population 18 Years and Over Who Are Veterans
% of People 16 to 64 Years Who Are in the Labor Force (Including Armed Forces)
Employment/Population Ratio for the Population 16 to 64 Years Old
% of Occupied Housing Units That Were Moved Into in 2005 or Later
Median Monthly Housing Costs for Owner-Occupied Housing Units With a Mortgage
% of Occupied Housing Units that are Owner-Occupied
% of Mortgaged Owners Spending >30% of Household Income on Owner Costs
% of Renter-Occupied Units Spending >30% of Household Income on Rent and Utilities
% without Health Insurance Coverage (Noninstitutionalized)
% of Children without Health Insurance Coverage