Hampton Roads Regional Benchmarking Study

8th Edition

E13-01

HAMPTON ROADS PDC
PLANNING DISTRICT COMMISSION

January 2013

HAMPTON ROADS PLANNING DISTRICT COMMISSION

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GREG GROOTENDORST	CHIEF ECONOMIST
JAMES CLARY	ECONOMIST
KEITH NICHOLS	HRTPO SENIOR TRANSPORTATION ENGINEER
MICHAEL LONG	GENERAL SERVICES MANAGER
CHRISTOPHER W. VAIGNEUR	ASSISTANT GENERAL SERVICES MANAGER
JENNIFER COLEMAN	ADMINISTRATIVE ASSISTANT

Regional Benchmarking Study

Preparation of this report was included in the HRPDC Unified Planning Work Program for Fiscal Year 2012-2013, approved by the Hampton Roads Planning District Commission at its Quarterly Commission Meeting of April 19, 2012.

Prepared by the staff of the
Hampton Roads Planning District Commission

January 2013

Report Documentation

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Fiscal Year 2013

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GRANTS/SPONSORING AGENCY
Local Funds

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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 104 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

Prepared by the staff of the Hampton Roads Planning District Commission.

Preparation of this report was included in the HRPDC Unified Planning Work Program for Fiscal Year 2012-2013, approved by the Hampton Roads Planning District Commission at its Quarterly Commission Meeting of April 19, 2012.

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Introduction

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 the region in every direction. The complex nature of the economy can make it difficult to understand how changes in the economic environment might impact Hampton Roads. Unfortunately there is no single data point or indicator that effectively assesses the condition of the entire economy. However, information is available for a host of variables, 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 included in this benchmarking study are reported in six general categories. The first and largest category is the economy. This section includes employment, income, and labor force benchmarks. The second section focuses on industry clusters in Hampton Roads. The third section focuses on demographics in the region. The fourth section reviews the housing industry in Hampton Roads. The fifth section outlines the state of regional transportation. The sixth section contains a myriad of miscellaneous quality of life indicators, and the seventh compares the 16 localities of the HRPDC across a variety of metrics. By combining all seven 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.

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 a snapshot of 2010 American Community Survey Data and basic information on the sixteen jurisdictions that comprise Hampton Roads.

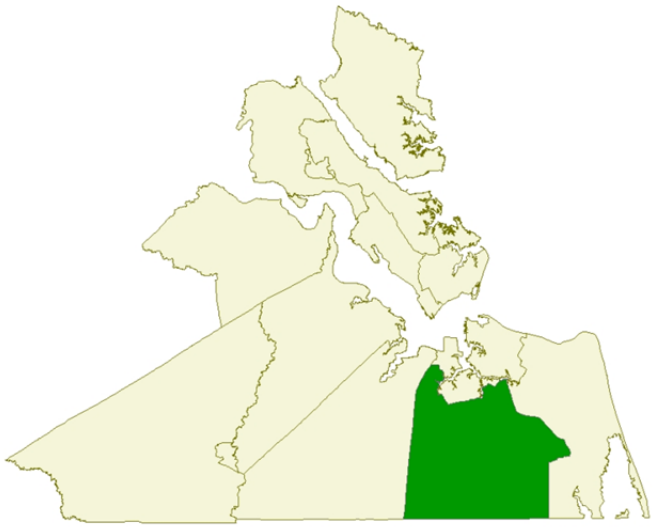
American Community Survey Data for Hampton Roads

Uses American Community Survey One Year Estimates 2010

Ranking is from largest value (ranked 1st) to smallest value (ranked 103rd)

Category	Hampton Roads Value	Hampton Roads Rank*	Median MSA Value
Median Age	35.7	**65**	36.7
% of Population 65 & Older	11.6%	**62**	12.1%
% of Population Who Are African American	31.3%	**8**	10.2%
% of Population Who Are White Non-Hispanic	57.0%	**70**	67.4%
% of Population Who Are Foreign Born	6.2%	**74**	8.6%
% of Population Who Moved in Past Year	17.4%	**30**	15.8%
Mean Travel Time to Work (Minutes)	23.7	**64**	24.1
% Who Traveled to Work by Public Transit	1.8%	**52**	1.8%
% Who Worked Outside County of Residence	47.9%	**5**	25.9%
% of Households With Children in Residence	33.4%	**49**	33.3%
Average Household Size	2.63	**37**	2.58
Birthrate per 1000 women (15 & 50 Years Old)	56	**42**	55
% of People Who Completed High School	89.6%	**21**	87.7%
% of People Who Have a Bachelor's Degree	28.5%	**56**	29.1%
% of People Who Have an Advanced Degree	10.8%	**45**	10.5%
% of Who Don't Speak English at Home	8.6%	**80**	13.3%
% of People in Poverty	10.6%	**93**	14.8%
% of Children Under 18 Years in Poverty	16.0%	**83**	21.1%
% of People With a Disability	11.0%	**64**	11.5%
% of the Civilian Population Who Are Veterans	18.1%	**1**	9.3%
% Labor Force Participation (16-64 Years Old)	67.7%	**28**	65.6%
% of Labor Force in the Armed Forces	4.9%	**2**	0.1%
% Who Moved Since 2005	46.9%	**51**	46.8%
Median Monthly Costs for Homeowners	$1,211	**20**	996
% of Housing Units that are Owner-Occupied	63.9%	**75**	66.8%
% Owners Spending >30% Income on Housing	40.6%	**32**	35.8%
% Renters Spending >30% Income on Housing	54.8%	**27**	52.3%
% without Health Insurance Coverage	11.9%	**70**	14.4%
% of Children without Health Insurance	5.4%	**62**	6.3%

**Rank & Median Value is for all MSAs with Populations greater then 500,000- 103 total*



Chesapeake

City Council:

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

Population - 2011	225,898
Land Area - 2011	340 Square Miles
Population Density - 2011	653 Persons Per Square Mile
Total Employment - 2011	122,324
Labor Force - 2011	119,508
Unemployment Rate - 2011	6.5%
Per Capita Income - 2011	$42,504
Total Personal Income - 2011	$9,565,620,000
Taxable Retail Sales - 2011	$2,927,041,905
Fair Market Value of Real Estate - 2010	$23,306,143,046

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

Population and Population Density- Weldon Cooper Center
Total Employment, Per Capita Income, and Total Personal Income- Bureau of Economic Analysis
Labor Force and Unemployment Rate- Virginia Employment Commission
Taxable Retail Sales and Fair Market Value of Real Estate- Virginia Department of Taxation

Franklin

City Council:

Ms. Raystine D. Johnson, Mayor
Mr. Barry Cheatham, Vice Mayor
Mr. Donald Blythe
Mr. Brenton D. Burgess
Mrs. Mary E. Hilliard
Ms. Mona Murphy
Mr. Greg McLemore

Population - 2011	8,680
Land Area - 2011	8 Square Miles
Population Density - 2011	1073 Persons Per Square Mile
Total Employment - 2011	5,336
Labor Force - 2011	3,913
Unemployment Rate - 2011	11.3%
Per Capita Income - 2011	$31,313
Total Personal Income - 2011	$271,804,042
Taxable Retail Sales - 2011	$149,028,981
Fair Market Value of Real Estate - 2010	$636,513,700

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

Population and Population Density- Weldon Cooper Center
Total Employment, Per Capita Income, and Total Personal Income- Bureau of Economic Analysis
Labor Force and Unemployment Rate- Virginia Employment Commission
Taxable Retail Sales and Fair Market Value of Real Estate- Virginia Department of Taxation

Gloucester

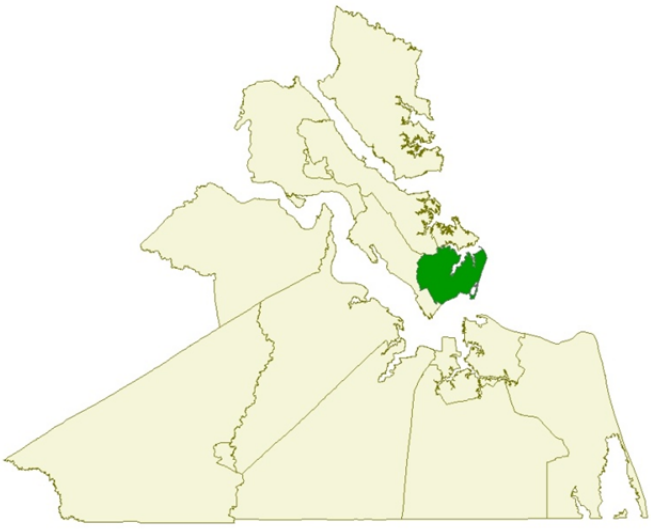
Board of Supervisors:

Ms. Louise Theberge, Chair
Mr. Robert Orth, Vice-Chair
Mr. Carter Borden
Mr. Ashley Chriscoe
Mr. Christopher Hutson
Mr. Andrew James
Mr. John Northstein

Population - 2011	36,987
Land Area - 2011	225 Square Miles
Population Density - 2011	164 Persons Per Square Mile
Total Employment - 2011	14,556
Labor Force - 2011	20,316
Unemployment Rate - 2011	5.9%
Per Capita Income - 2011	$38,886
Total Personal Income - 2011	$1,434,937,000
Taxable Retail Sales - 2011	$337,694,276
Fair Market Value of Real Estate - 2010	$4,322,969,200

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

Population and Population Density- Weldon Cooper Center
Total Employment, Per Capita Income, and Total Personal Income- Bureau of Economic Analysis
Labor Force and Unemployment Rate- Virginia Employment Commission
Taxable Retail Sales and Fair Market Value of Real Estate- Virginia Department of Taxation



Hampton

City Council:

Ms. Molly J. Ward, Mayor
Mr. George E. Wallace, Vice Mayor
Mr. Billy Hobbs Jr.
Mr. Will J. Moffett
Ms. Chris Osby Snead
Mr. Christopher G. Stuart
Mr. Donnie R. Tuck

Population - 2011	137,372
Land Area - 2011	52 Square Miles
Population Density - 2011	2643 Persons Per Square Mile
Total Employment - 2011	75,788
Labor Force - 2011	66,713
Unemployment Rate - 2011	8.4%
Per Capita Income - 2011	$40,001
Total Personal Income - 2011	$5,456,189,000
Taxable Retail Sales - 2011	$1,291,230,845
Fair Market Value of Real Estate - 2010	$11,455,711,400

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

Population and Population Density- Weldon Cooper Center
Total Employment, Per Capita Income, and Total Personal Income- Bureau of Economic Analysis
Labor Force and Unemployment Rate- Virginia Employment Commission
Taxable Retail Sales and Fair Market Value of Real Estate- Virginia Department of Taxation

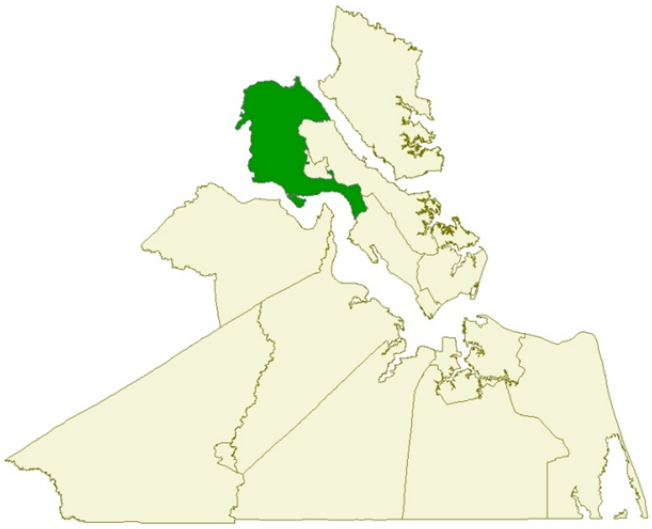
Isle of Wight

Board of Supervisors:
Ms. JoAnn W. Hall, Chair
Mr. Byron B. Bailey, Vice Chair
Mr. Rex Alphin
Mr. Al Casteen
Ms. Delores M. Darden

Population - 2011	35,457
Land Area - 2011	316 Square Miles
Population Density - 2011	112 Persons Per Square Mile
Total Employment - 2011	14,966
Labor Force - 2011	19,318
Unemployment Rate - 2011	6.5%
Per Capita Income - 2011	$42,883
Total Personal Income - 2011	$1,516,168,000
Taxable Retail Sales - 2011	$204,651,647
Fair Market Value of Real Estate - 2010	$4,683,659,000

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

Population and Population Density- Weldon Cooper Center
Total Employment, Per Capita Income, and Total Personal Income- Bureau of Economic Analysis
Labor Force and Unemployment Rate- Virginia Employment Commission
Taxable Retail Sales and Fair Market Value of Real Estate- Virginia Department of Taxation



James City County

Board of Supervisors:

Mr. James G. Kennedy, Chair
Mr. John J. McGlennon, Vice-Chair
Mr. James O. Icenhour Jr.
Ms. Mary K. Jones
Vacant

Population - 2011	68,874
Land Area - 2011	153 Square Miles
Population Density - 2011	438 Persons Per Square Mile
Total Employment - 2011	32,968
Labor Force - 2011	35,170
Unemployment Rate - 2011	5.3%
Per Capita Income - 2011	$52,228
Total Personal Income - 2011	$3,597,140,826
Taxable Retail Sales - 2011	$838,306,392
Fair Market Value of Real Estate - 2010	$11,320,396,100

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

Population and Population Density- Weldon Cooper Center
Total Employment, Per Capita Income, and Total Personal Income- Bureau of Economic Analysis
Labor Force and Unemployment Rate- Virginia Employment Commission
Taxable Retail Sales and Fair Market Value of Real Estate- Virginia Department of Taxation

Newport News

City Council:

Dr. McKinley L. Price, Mayor
Herbert H. Bateman, Jr., Vice Mayor
Mr. Robert S. Coleman
Ms. Sharon P. Scott
Ms. Tina L. Vick
Mr. Joseph C. Whitaker
Ms. Patricia P. Woodbury

Population - 2011	181,027
Land Area - 2011	70 Square Miles
Population Density - 2011	2582 Persons Per Square Mile
Total Employment - 2011	116,133
Labor Force - 2011	91,864
Unemployment Rate - 2011	7.8%
Per Capita Income - 2011	$34,752
Total Personal Income - 2011	$6,241,927,000
Taxable Retail Sales - 2011	$1,892,223,547
Fair Market Value of Real Estate - 2010	$14,980,721,967
Official Website	www.nngov.com

Population and Population Density- Weldon Cooper Center
Total Employment, Per Capita Income, and Total Personal Income- Bureau of Economic Analysis
Labor Force and Unemployment Rate- Virginia Employment Commission
Taxable Retail Sales and Fair Market Value of Real Estate- Virginia Department of Taxation

Norfolk

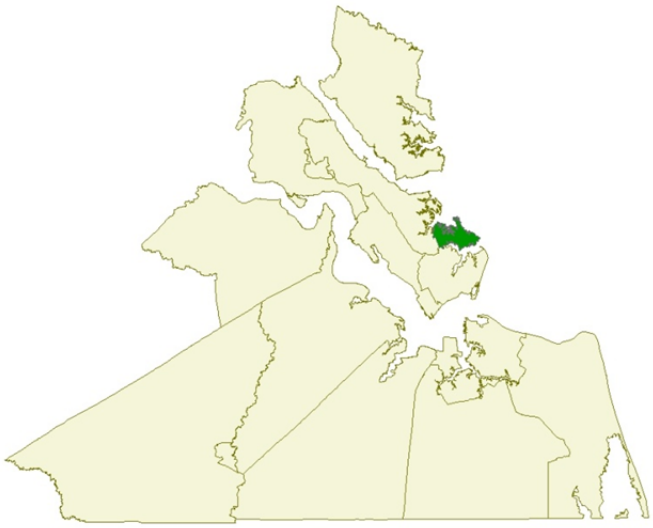
City Council:

Mr. Paul D. Fraim, Mayor
Mr. Anthony L. Burfoot, Vice Mayor
Mr. Andrew A. Protogyrou
Mr. Paul R. Riddick
Mr. Thomas R. Smigiel
Dr. Theresa W. Whibley
Ms. Angelia M. Williams
Mr. Barclay C. Winn

Population - 2011	243,985
Land Area - 2011	54 Square Miles
Population Density - 2011	4496 Persons Per Square Mile
Total Employment - 2011	209,930
Labor Force - 2011	107,278
Unemployment Rate - 2011	8.4%
Per Capita Income - 2011	$36,873
Total Personal Income - 2011	$8,946,520,000
Taxable Retail Sales - 2011	$2,589,607,975
Fair Market Value of Real Estate - 2010	$18,474,654,400

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

Population and Population Density- Weldon Cooper Center
Total Employment, Per Capita Income, and Total Personal Income- Bureau of Economic Analysis
Labor Force and Unemployment Rate- Virginia Employment Commission
Taxable Retail Sales and Fair Market Value of Real Estate- Virginia Department of Taxation



Poquoson

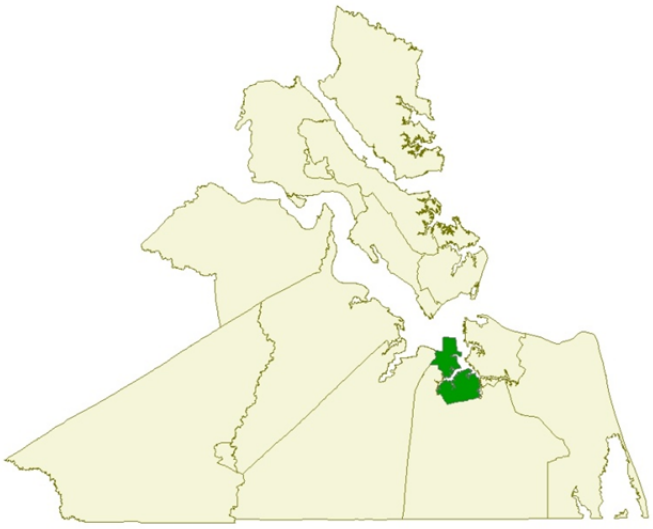
City Council:

Mr. W. Eugene Hunt Jr., Mayor
Mr. Carey L. Freeman, Vice Mayor
Ms. Traci-Dale Crawford
Mr. Herbert R. Green Jr.
Mr. Frank Kreiger
Mr. Charles M. Southall III
Mr. Raymond E. Vernall

Population - 2011	12,240
Land Area - 2011	16 Square Miles
Population Density - 2011	759 Persons Per Square Mile
Total Employment - 2011	3,259
Labor Force - 2011	6,658
Unemployment Rate - 2011	5.4%
Per Capita Income - 2011	$47,564
Total Personal Income - 2011	$582,195,251
Taxable Retail Sales - 2011	$43,773,528
Fair Market Value of Real Estate - 2010	$1,711,308,830

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

Population and Population Density- Weldon Cooper Center
Total Employment, Per Capita Income, and Total Personal Income- Bureau of Economic Analysis
Labor Force and Unemployment Rate- Virginia Employment Commission
Taxable Retail Sales and Fair Market Value of Real Estate- Virginia Department of Taxation



Portsmouth

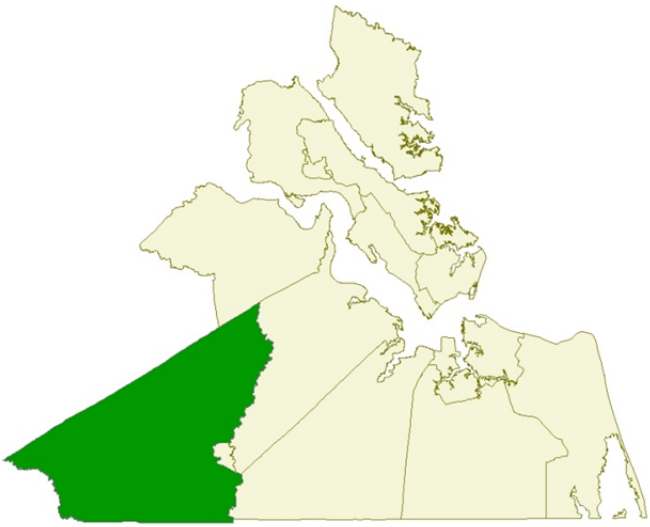
City Council:

Mr. Kenneth I. Wright, Mayor
Mr. Paige D. Cherry, Vice Mayor
Mr. Curtis E. Edmonds, Sr.
Mr. Danny W. Meeks
Mr. William E. Moody, Jr.
Ms. Elizabeth M. Psimas
Ms. Marlene W. Randall

Population - 2011	96,368
Land Area - 2011	33 Square Miles
Population Density - 2011	2895 Persons Per Square Mile
Total Employment - 2011	57,943
Labor Force - 2011	45,125
Unemployment Rate - 2011	8.7%
Per Capita Income - 2011	$37,583
Total Personal Income - 2011	$3,596,088,000
Taxable Retail Sales - 2011	$583,260,969
Fair Market Value of Real Estate - 2010	$7,226,951,423

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

Population and Population Density- Weldon Cooper Center
Total Employment, Per Capita Income, and Total Personal Income- Bureau of Economic Analysis
Labor Force and Unemployment Rate- Virginia Employment Commission
Taxable Retail Sales and Fair Market Value of Real Estate- Virginia Department of Taxation



Southampton

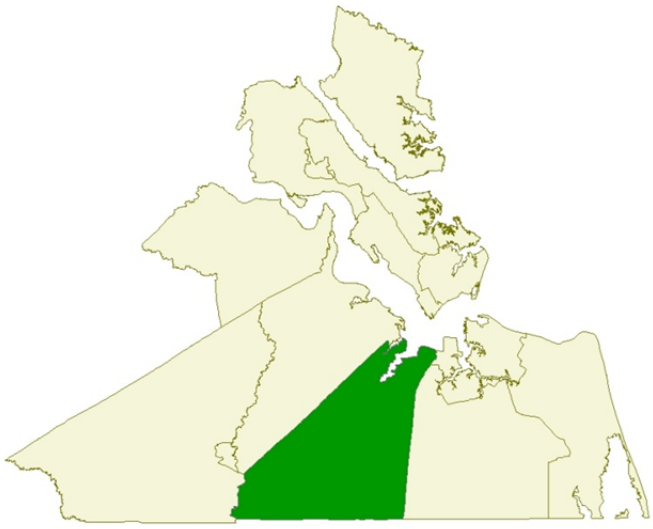
Board of Supervisors:

Mr. Dallas O. Jones , Chair
Dr. Alan W. Edwards, Vice-Chair
Mr. Carl J. Faison
Mr. S. Bruce Phillips
Mr. Barry T. Porter
Mr. Glenn H. Updike
Mr. Ronald M. West

Population - 2011	18,714
Land Area - 2011	600 Square Miles
Population Density - 2011	31 Persons Per Square Mile
Total Employment - 2011	6,006
Labor Force - 2011	8,233
Unemployment Rate - 2011	8.6%
Per Capita Income - 2011	$31,313
Total Personal Income - 2011	$585,986,472
Taxable Retail Sales - 2011	$45,345,887
Fair Market Value of Real Estate - 2010	$1,620,040,200

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

Population and Population Density- Weldon Cooper Center
Total Employment, Per Capita Income, and Total Personal Income- Bureau of Economic Analysis
Labor Force and Unemployment Rate- Virginia Employment Commission
Taxable Retail Sales and Fair Market Value of Real Estate- Virginia Department of Taxation



Suffolk

City Council:

Ms. Linda T. Johnson, Mayor
Mr. Charles F. Brown, Vice Mayor
Mr. Michael D. Duman
Mr. Roger W. Fawcett
Mr. Jeffrey L. Gardy
Mr. Curtis R. Milteer, Sr.
Mr. Charles D. Parr, Sr.
Mr. Lue R. Ward, Jr.

Population - 2011	85,692
Land Area - 2011	400 Square Miles
Population Density - 2011	211 Persons Per Square Mile
Total Employment - 2011	34,469
Labor Force - 2011	42,867
Unemployment Rate - 2011	7.1%
Per Capita Income - 2011	$39,279
Total Personal Income - 2011	$3,335,932,000
Taxable Retail Sales - 2011	$671,236,320
Fair Market Value of Real Estate - 2010	$9,685,243,300

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

Population and Population Density- Weldon Cooper Center
Total Employment, Per Capita Income, and Total Personal Income- Bureau of Economic Analysis
Labor Force and Unemployment Rate- Virginia Employment Commission
Taxable Retail Sales and Fair Market Value of Real Estate- Virginia Department of Taxation

Surry

Board of Supervisors:
Mr. John M. Seward, Chair
Mr. Ernest L. Blount, Vice-Chair
Kenneth R. Holmes
Ms. Judy S. Lyttle
Mr. Giron R. Wooden, Sr.

Population - 2011	6,968
Land Area - 2011	279 Square Miles
Population Density - 2011	25 Persons Per Square Mile
Total Employment - 2011	3,290
Labor Force - 2011	3,864
Unemployment Rate - 2011	7.8%
Per Capita Income - 2011	$34,860
Total Personal Income - 2011	$241,616,000
Taxable Retail Sales - 2011	$34,887,560
Fair Market Value of Real Estate - 2010	$872,027,400

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

Population and Population Density- Weldon Cooper Center
Total Employment, Per Capita Income, and Total Personal Income- Bureau of Economic Analysis
Labor Force and Unemployment Rate- Virginia Employment Commission
Taxable Retail Sales and Fair Market Value of Real Estate- Virginia Department of Taxation

Virginia Beach

City Council:

Mr. William D. Sessoms, Mayor
Mr. Louis R. Jones , Vice Mayor
Mr. Glenn R. Davis
Mr. Bill R. DeSteph
Mr. Bob Dyer
Ms. Barbara M. Henley
Mr. John D. Moss
Dr. Amelia Ross-Hammond
Mr. John E. Uhrin
Ms. Rosemary Wilson
Mr. James L. Wood

Population - 2011	441,246
Land Area - 2011	248 Square Miles
Population Density - 2011	1766 Persons Per Square Mile
Total Employment - 2011	238,578
Labor Force - 2011	230,961
Unemployment Rate - 2011	6.0%
Per Capita Income - 2011	$46,799
Total Personal Income - 2011	$20,718,174,000
Taxable Retail Sales - 2011	$4,738,333,394
Fair Market Value of Real Estate - 2010	$52,349,937,326

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

Population and Population Density- Weldon Cooper Center
Total Employment, Per Capita Income, and Total Personal Income- Bureau of Economic Analysis
Labor Force and Unemployment Rate- Virginia Employment Commission
Taxable Retail Sales and Fair Market Value of Real Estate- Virginia Department of Taxation

Williamsburg

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

Population - 2011	14,256
Land Area - 2011	9 Square Miles
Population Density - 2011	1563 Persons Per Square Mile
Total Employment - 2011	22,146
Labor Force - 2011	6,314
Unemployment Rate - 2011	14.0%
Per Capita Income - 2011	$52,228
Total Personal Income - 2011	$744,552,967
Taxable Retail Sales - 2011	$341,210,119
Fair Market Value of Real Estate - 2010	$1,827,509,200

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

Population and Population Density- Weldon Cooper Center
Total Employment, Per Capita Income, and Total Personal Income- Bureau of Economic Analysis
Labor Force and Unemployment Rate- Virginia Employment Commission
Taxable Retail Sales and Fair Market Value of Real Estate- Virginia Department of Taxation

York County

Board of Supervisors:

Mr.Walter Z. Zaremba , Chair
Mr. Donald E. Wiggins, Vice-Chair
Mr. George S. Hrichak
Ms. Sheila S. Noll
Mr. Thomas G. Shepperd

Population - 2011	65,973
Land Area - 2011	106 Square Miles
Population Density - 2011	618 Persons Per Square Mile
Total Employment - 2011	33,139
Labor Force - 2011	34,049
Unemployment Rate - 2011	5.4%
Per Capita Income - 2011	$47,564
Total Personal Income - 2011	$3,137,963,078
Taxable Retail Sales - 2011	$867,742,727
Fair Market Value of Real Estate - 2010	$9,020,255,734

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

Population and Population Density- Weldon Cooper Center
Total Employment, Per Capita Income, and Total Personal Income- Bureau of Economic Analysis
Labor Force and Unemployment Rate- Virginia Employment Commission
Taxable Retail Sales and Fair Market Value of Real Estate- Virginia Department of Taxation

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SECTION I

The Economy

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

Section I Table of Contents

Economy

Hampton Roads is known as a military bastion, due to the region's impressive concentration of defense installations and large military employment base. While the Department of Defense does play a large role in the region's economy, Hampton Roads also benefits from numerous industries that capitalize on the region's competitive advantages. Deep water access and well-connected rail services provide direct employment opportunities for the port, maritime, and transportation industries. Historic landmarks, theme parks, and sandy beaches help to support a thriving tourism industry. A network of Colleges, Universities, and research centers build human capital and expand opportunities throughout the region. The complex network of assets, employers, opportunities and employees supports just under one million jobs for nearly 1.7 million Hampton Roads residents.

The relative significance of the region's economy becomes especially evident when compared to other economies throughout the world. Hampton Roads' $80.4 billion in gross regional product (GRP) is similar in size to that of the Slovak Republic and Oman. The region is the 40th largest metropolitan economy in the United States.

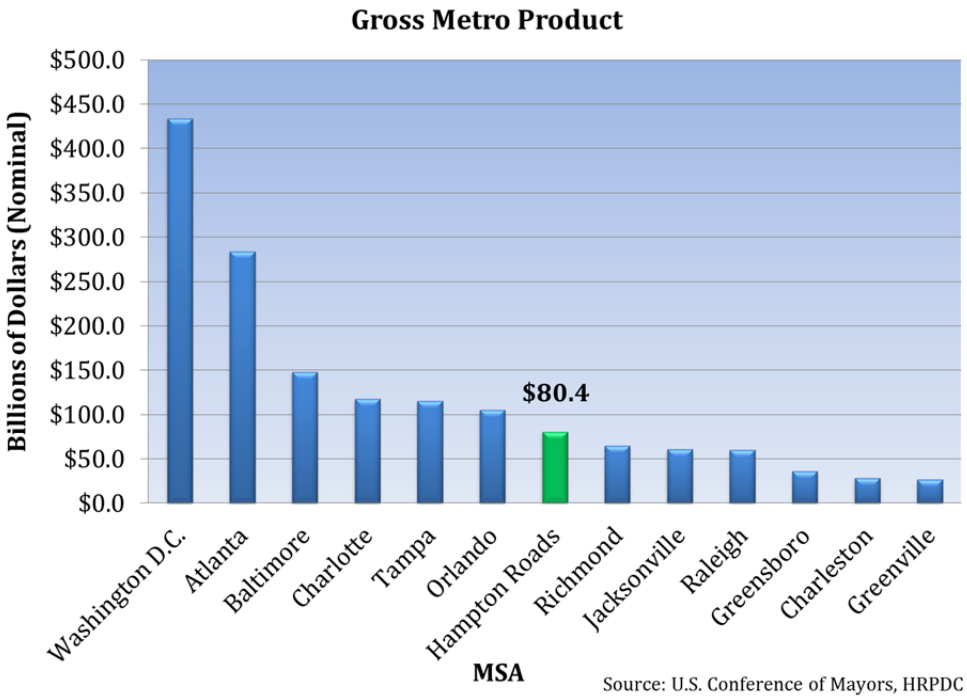
Hampton Roads has long been recognized as a region of moderation. Relatively stable federal dollars have not been a strong source of growth during periods of expansion, but have buoyed the region during periods of economic contraction. The region's diverse occupational and industrial mix is often reflective of national economic well-being. When compared to competitor regions, Hampton Roads' growth in terms of gross product and employment has been average over the past 3 -5 years. While growth has been average over the medium term, the loss of employment since the beginning of the recession has been enormous. Since July of 2007, Hampton Roads had lost in excess of 50,000 jobs. Over the past three years, only five of the region's industry sectors have managed to grow employment, and four of those either are government positions or industries that derive a majority of their revenue from the government. The region's manufacturing, retail, and construction sectors have seen the large employment declines, falling by 20,600 positions between 2008 and 2011, but professional and business services have also declined (-7,800).

Employment loss has taken a toll on the region's labor force. Although the unemployment rate in Hampton Roads continues to compare favorably to the national unemployment rate, the region has experienced a substantial rate increase from 2.5% in 2001 to 7.5% in December of 2009 and back down to 6.4% in October of 2012. Over the past three years, there has been a notable gulf developing between the regional and statewide unemployment rate.

Measures of income are important quality of life indicators, as increased income often reflects increased opportunity. While per capita income in Hampton Roads continues to lag behind the national average, the region has experienced considerable income growth over the past decade. The per capita income in Hampton Roads compares somewhat favorably to its competitor metro areas. However, when incomes are adjusted for this region's above average cost of living, the purchasing power of regional incomes remains one of the lowest among metro areas in the southeast.

This section of the Regional Benchmarking Study includes twenty four graphs on the regional economy.

Figure 1.1 Gross Regional 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 regional product is comparable to other regional MSAs including Tampa, Orlando, Richmond, and Jacksonville. The region's GRP is the 40th largest in the country, just behind Bridgeport, Connecticut and ahead of New Orleans.

Figure 1.2 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 remains a major economy on a world level, with an economy just smaller than that of Morocco, the Slovak Republic, and Iraq. It is greater than the economies of countries like Oman, Ecuador, and Luxemborg.

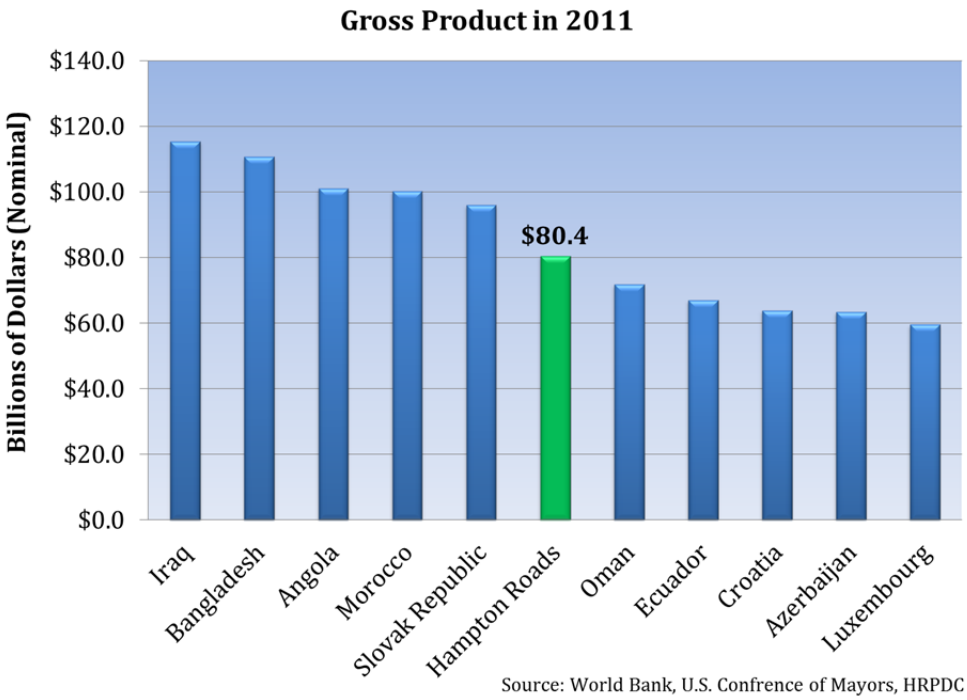
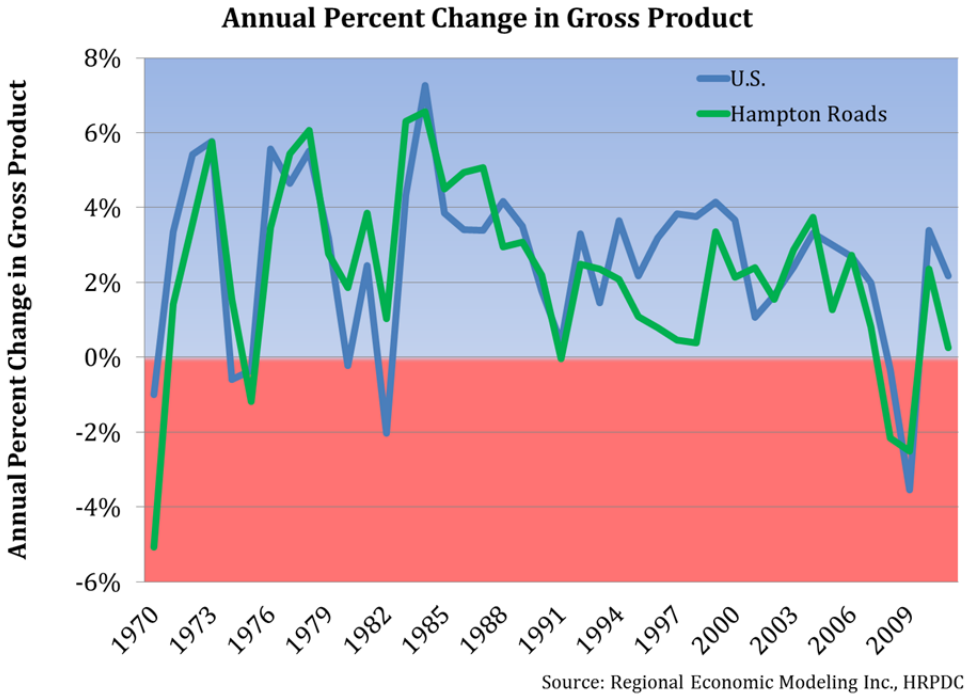


Figure 1.3 National and Regional Gross Product



Source: Regional Economic Modeling Inc., HRPDC

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 2009 Hampton Roads for the first time since 1991. Hampton Roads GRP tends to track the national experience.

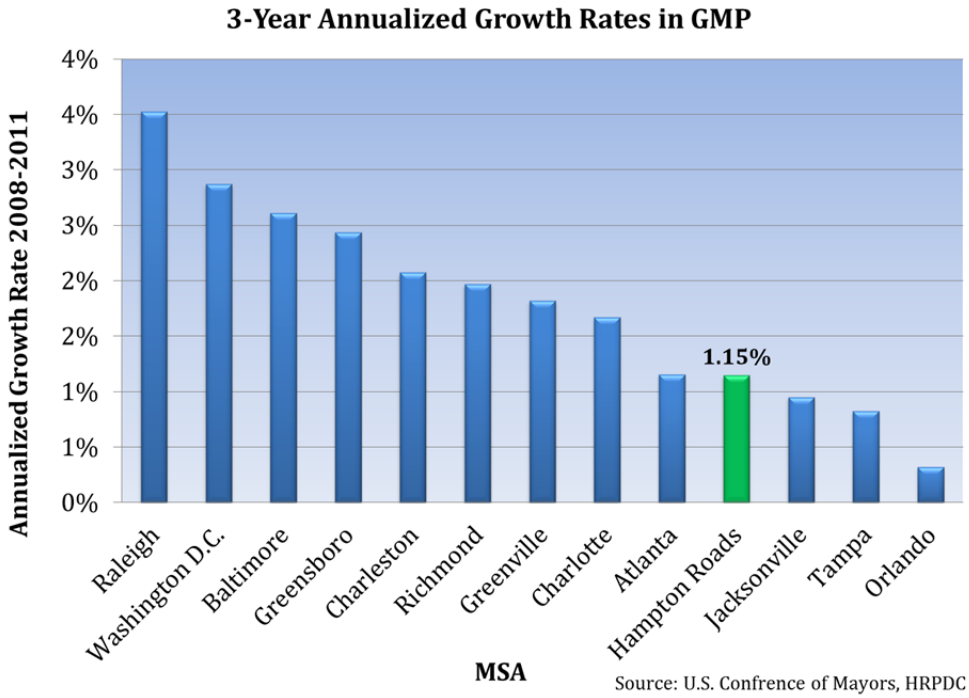
1.4 Growth in Gross Regional Product Comparison for Hampton Roads and Competing Metropolitan Areas from 2008 to 2011

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.

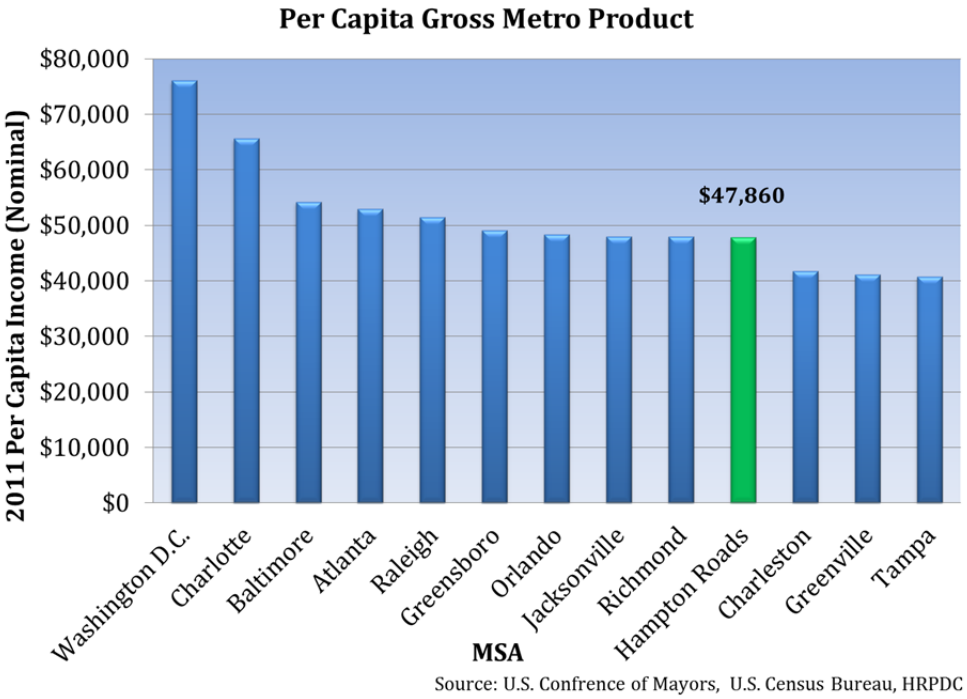
How are we doing?

Over the past three years the performance of Hampton Roads' economy has been below average. Slow population growth and increasingly constrained national defense spending have led the region to have a relatively weak economic recovery.



Source: U.S. Confrence of Mayors, HRPDC

1.5 Per Capita Gross Regional Product for Hampton Roads and Competing Metropolitan Areas



Source: U.S. Confrence of Mayors, U.S. Census Bureau, HRPDC

Why is it important?

Per Capita Gross Regional Product shows productivity in Hampton Roads and competing MSAs. Higher levels of productivity can spur economic growth and increase the quality of life.

How are we doing?

The Per Capita Gross Product in Hampton Roads is slightly below average for this region's competing MSAs. It is clear that Washington D.C. and Charlotte produce at a much higher level per person then the other MSAs with which Hampton Roads competes.

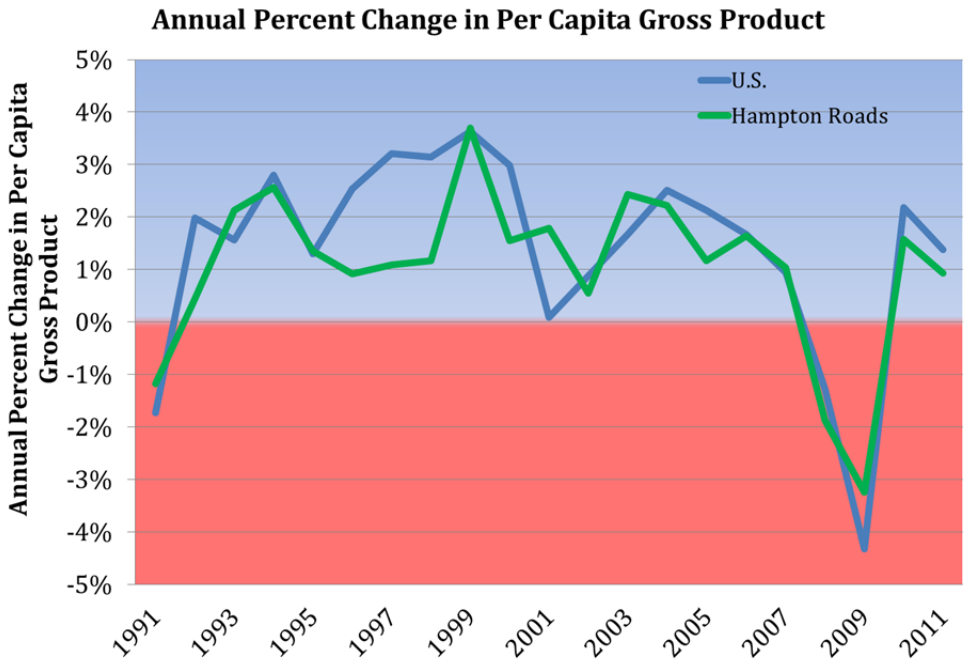
Figure 1.6 Annual Growth In Per Capita GDP And In Hampton Roads Per Capita GRP

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.

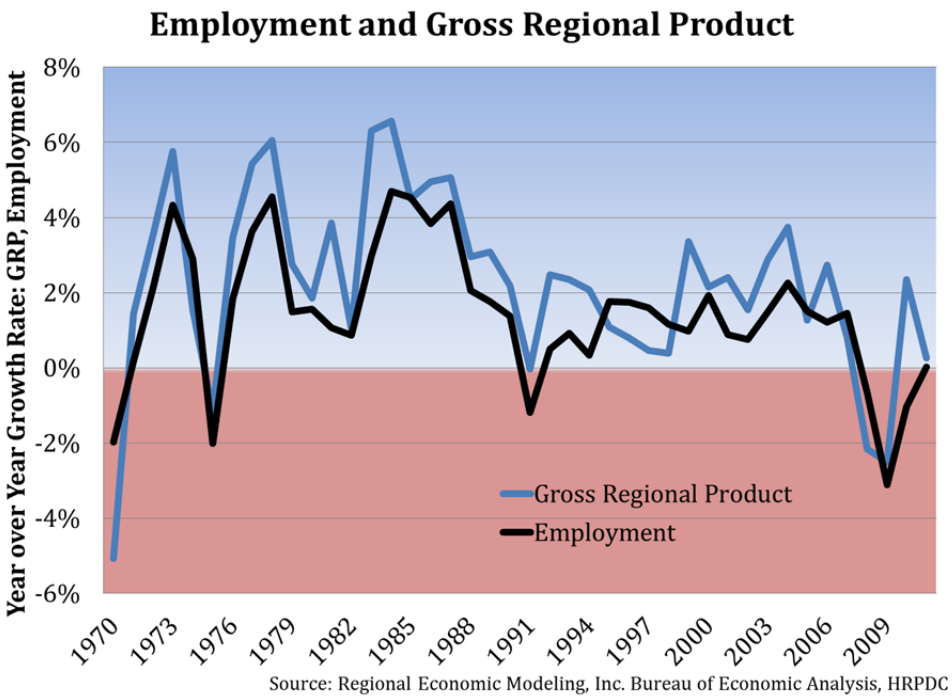
How are we doing?

While the region has fared relatively well since the 2007 recession, over a longer time horizon, productivity growth in Hampton Roads has not matched national growth. Extended periods of slow growth will reduce quality of life in the region. Individual productivity growth in the region has begun to lag the nation's over the past year.



Source: Regional Economic Modeling Inc., HRPDC

Figure 1.7 Employment and Gross Product in Hampton Roads



Source: Regional Economic Modeling, Inc. Bureau of Economic Analysis, HRPDC

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.

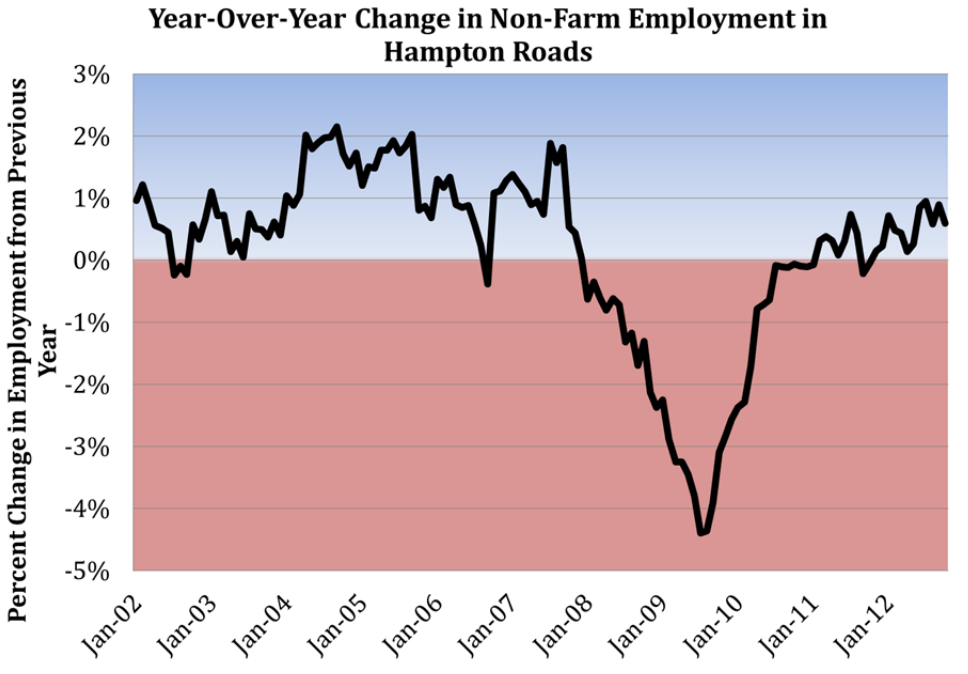
Figure 1.8 Year over Year Change in Hampton Roads' Monthly Employment

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.

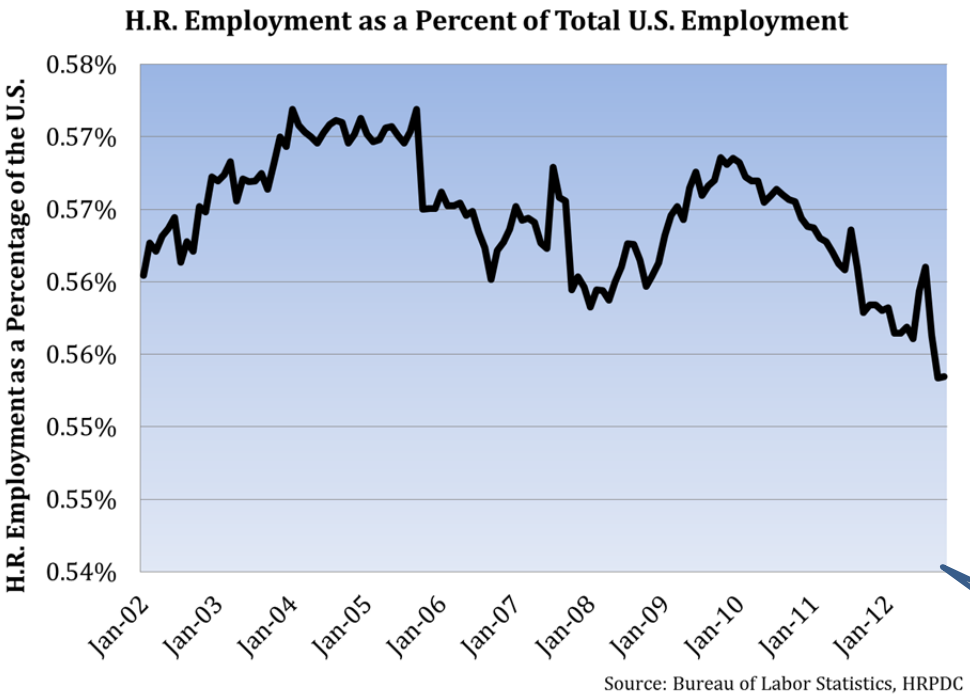
How are we doing?

Hampton Roads employment has declined significantly during the last recession and has not developed a sustainable trend towards recovery. The size of the trough shows the level of economic destruction with which the region (and nation) has been grappling, and represents a roughly 50,000 job decline in regional payrolls. The region has experienced a fitful recovery since the end of the recession.



Source: Bureau of Labor Statistics, HRPDC

Figure 1.9 Hampton Roads Monthly Employment as a Percent of the United States (Seasonally Adjusted)



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 has helped the region weather the national economic downturns, but Hampton Roads employment share has declined since October 2009.

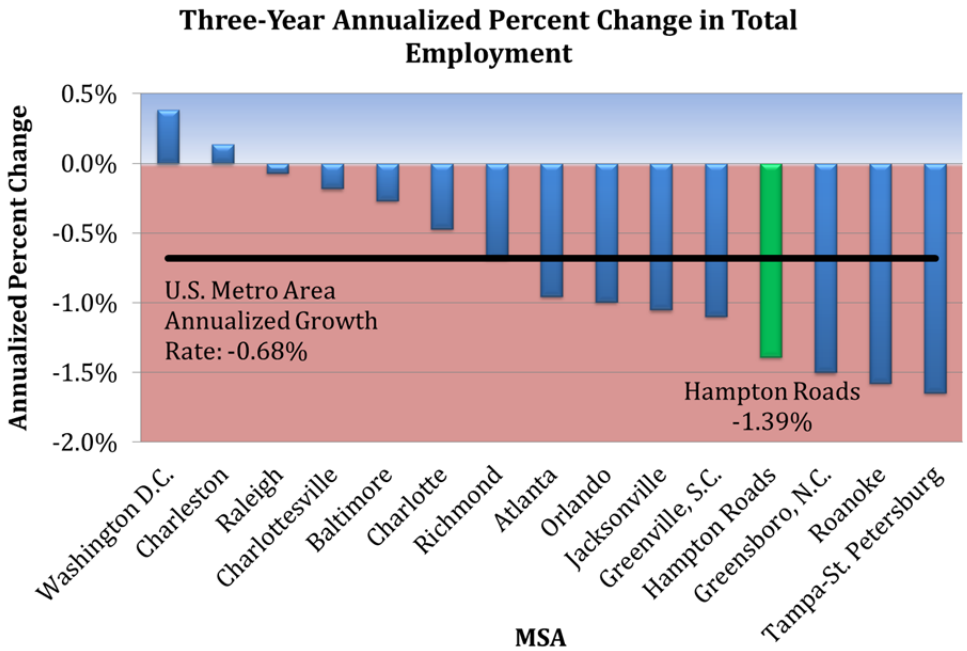
Figure 1.10 Recent Employment Growth in Hampton Roads and Competing Metropolitan Areas

Why is it important?

A change in the level of 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.

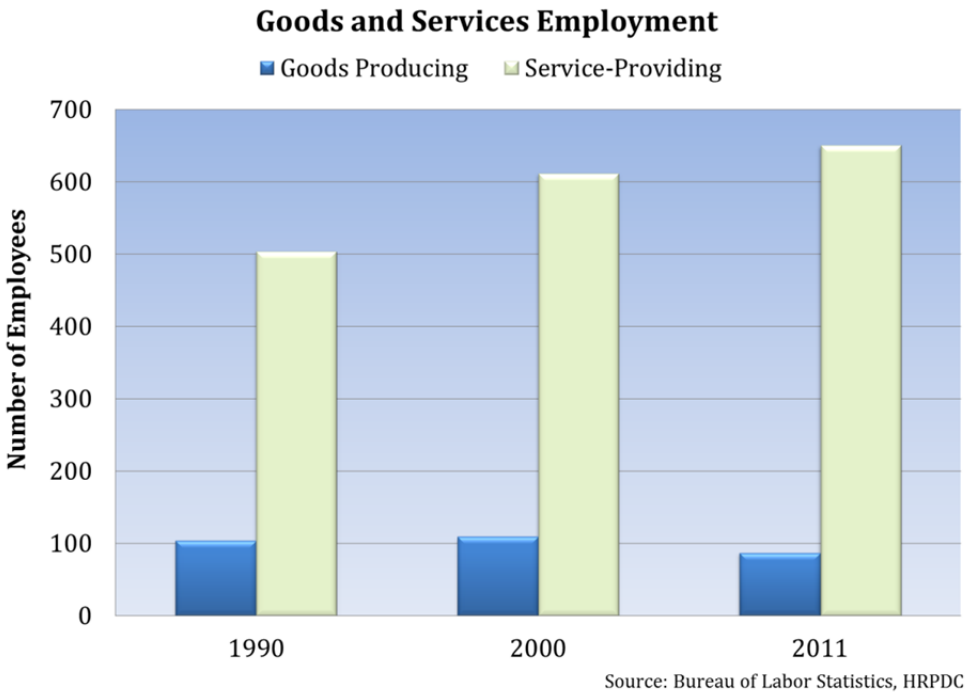
How are we doing?

Hampton Roads has experienced a level of growth below the US average during this three year period (2009-2011). While it is not uncommon for an area to have year to year fluctuations in employment, this sustained decline in employment indicates how weak the recession left the U.S. economy.



Source: Bureau of Economic Analysis, HRPDC

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, bringing in money from outside the region. Note that neither category captures active duty military employment.

How are we doing?

Hampton Roads participates in the trend of declining manufacturing growth. The U.S. experienced a 30% decline in goods producing employment vs. an 18.6% decline in the region (2000-2011).

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 had a large government component because of the numerous military bases in the region. While the government component remains significant, most of Hampton Roads' variation in employment comes from changes in private sector employment.

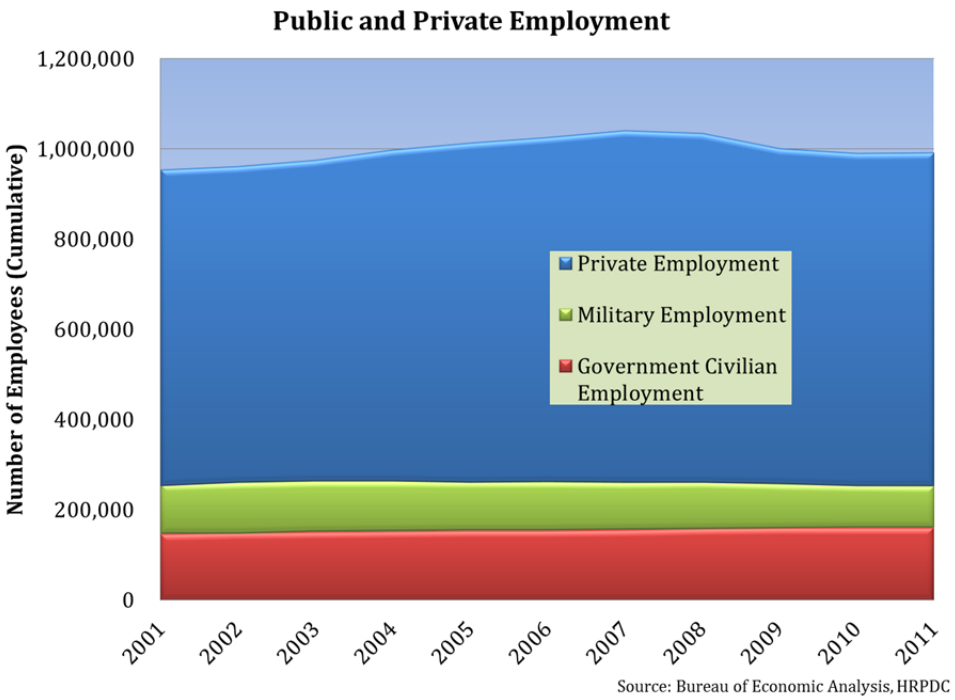
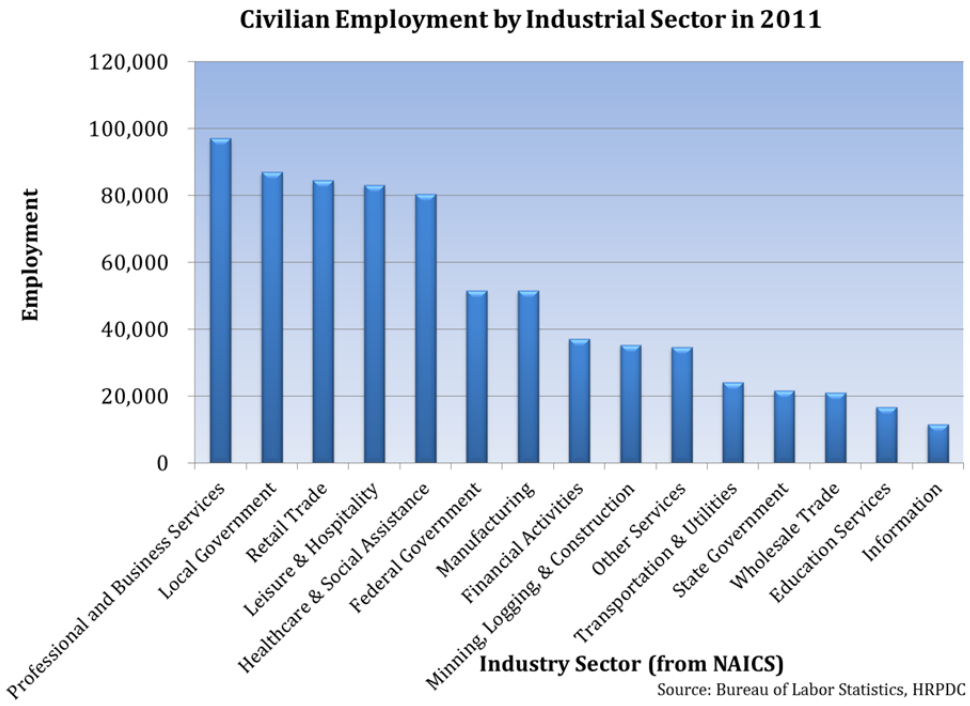


Figure 1.13 Distribution of Employment in Hampton Roads by Industry Sector



Source: Bureau of Labor Statistics, HRPDC

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 are the three largest employment sectors in Hampton Roads. Health Services have been growing in importance over the past decade, and was one of the few industries that kept expanding through the recession.

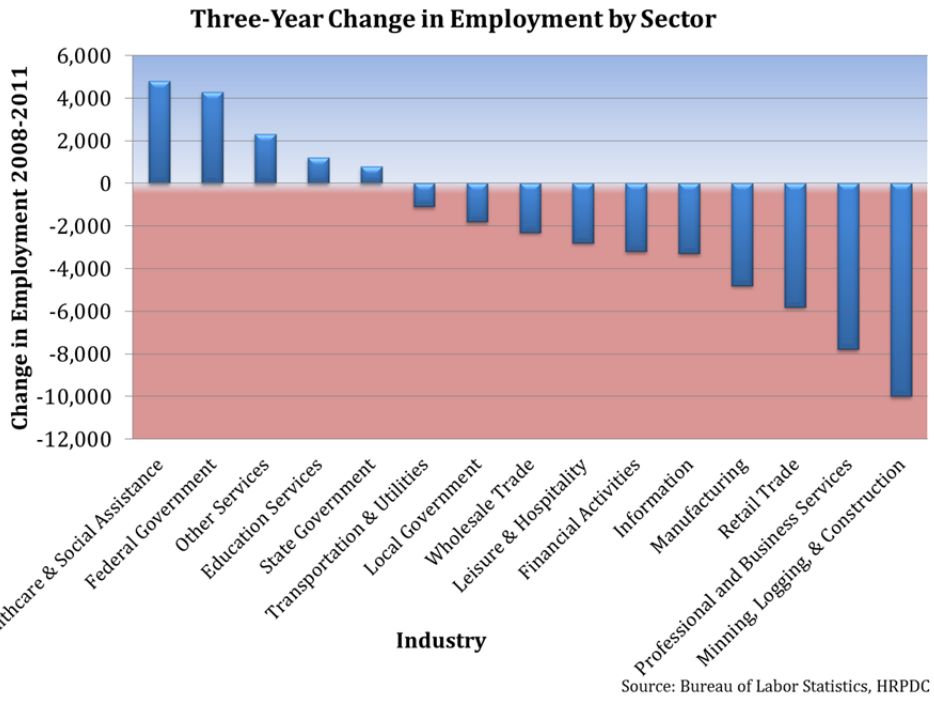
Figure 1.14 Change in Hampton Roads Employment by Industrial Sector from 2008 to 2011

Why is it important?

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

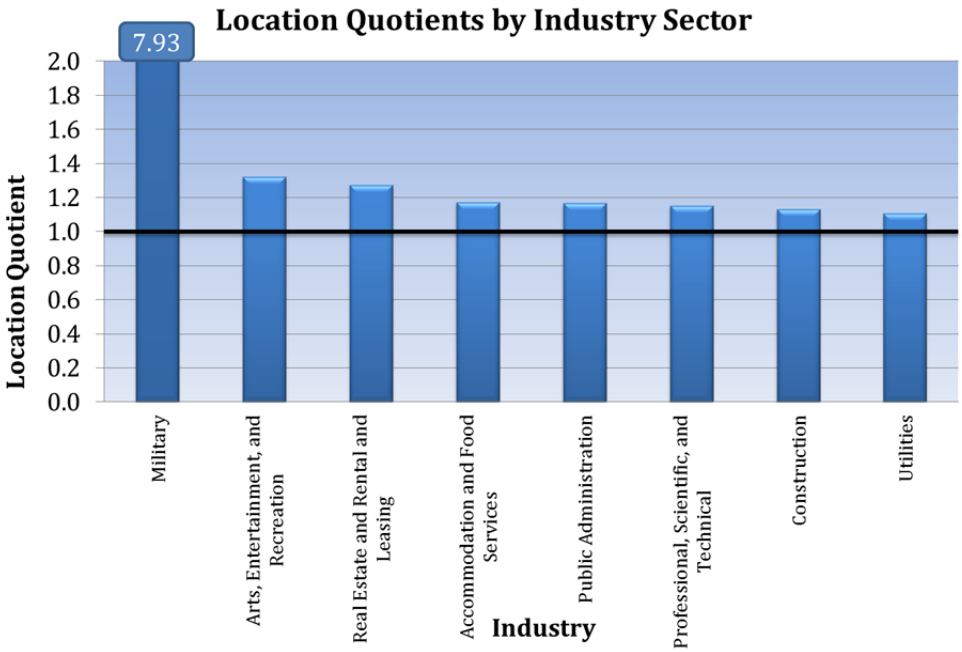
How are we doing?

Hampton Roads saw 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.



Source: Bureau of Labor Statistics, HRPDC

Figure 1.15 Hampton Roads Industrial Location Quotients in 2010



Source: Bureau of Labor Statistics, Virginia Employment Commission,

Why is it important?

Location quotients (LQ) 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.

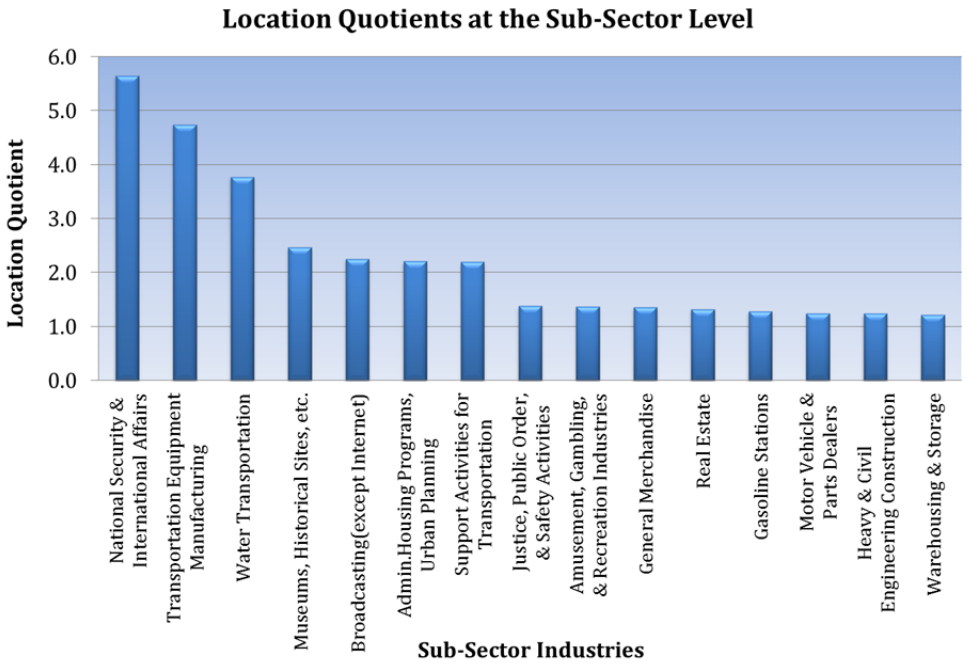
Figure 1.16 Hampton Roads Sub-Sector Location Quotients in 2010

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.

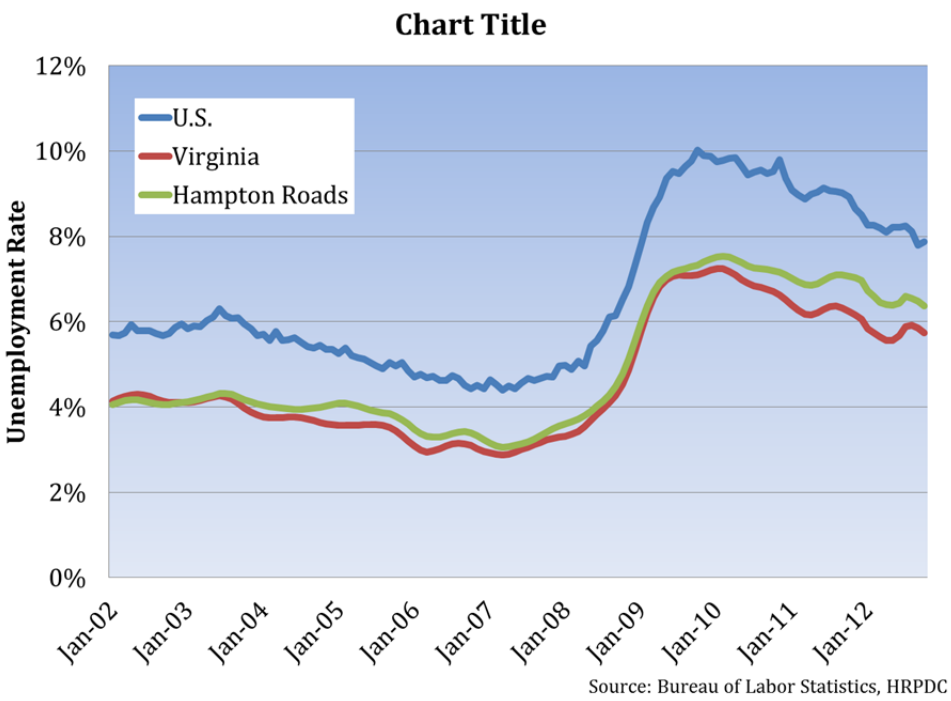
How are we doing?

Water transportation, transportation equipment manufacturing, and national security contractors have the three highest private sector industrial location quotients in Hampton Roads pointing to the economy clusters associated with the ports and the defense industry.



Source: Bureau of Labor Statistics, Virginia Employment Commission, HRPDC

Figure 1.17 Unemployment Rates in Hampton Roads, Virginia, and the United States (Seasonally Adjusted)



Source: Bureau of Labor Statistics, HRPDC

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 declined relatively slowly from the recent peak during the mose recent recession.

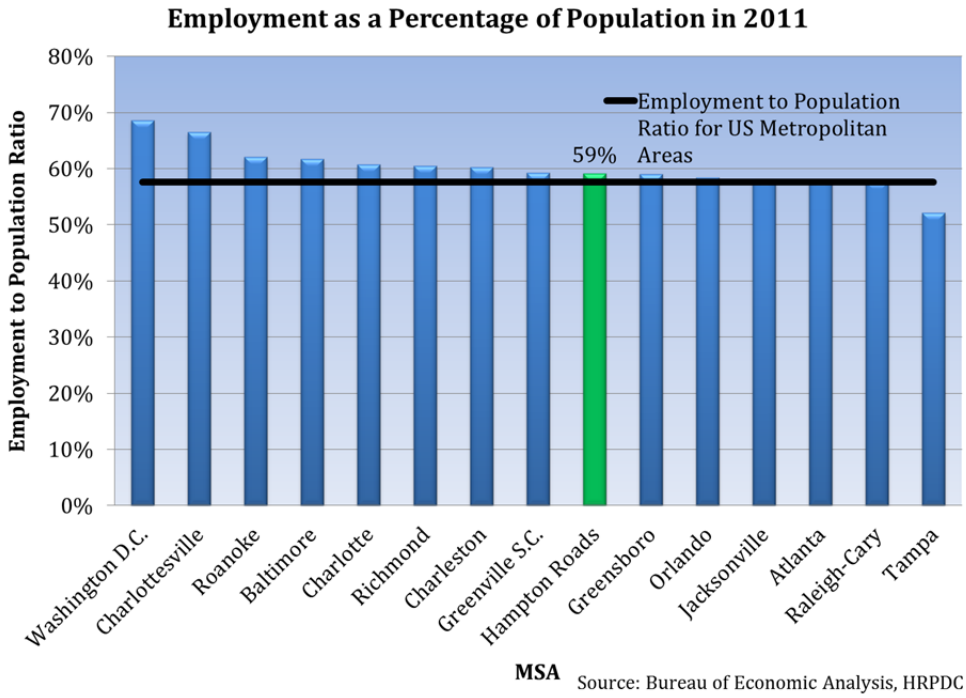
Figure 1.18 Employment to Population Ratios in Hampton Roads and Competing Metro Areas

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.

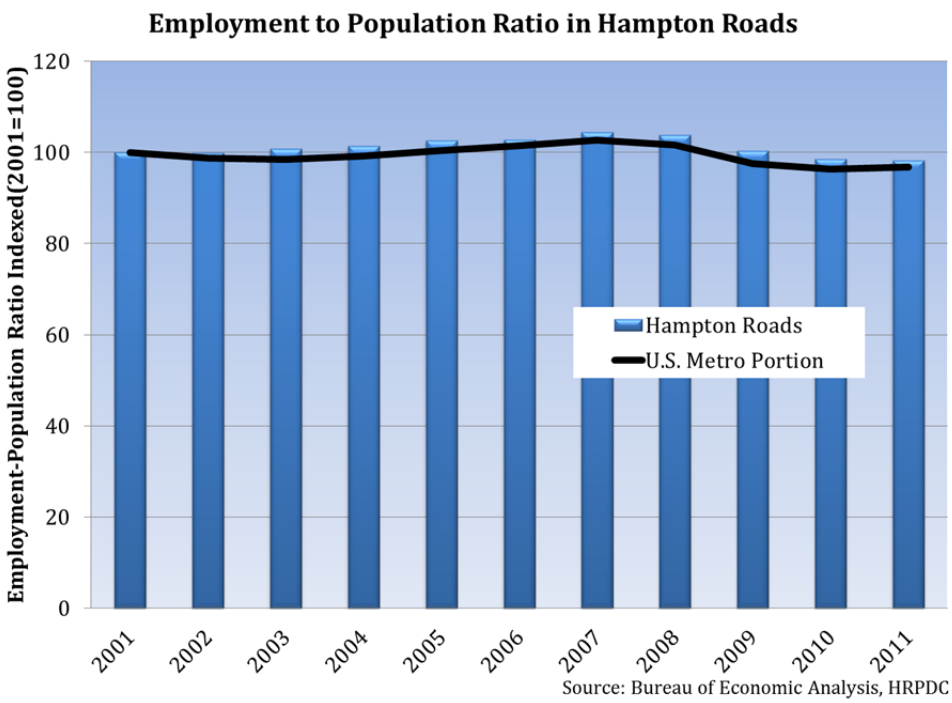
How are we doing?

At 59.9%, Hampton Roads' employment to population ratio is slightly above the average level of U.S. metropolitan areas.



Source: Bureau of Economic Analysis, HRPDC

Figure 1.19 Indexed Employment to Population Ratios in Hampton Roads and U.S. Metropolitan Portion



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 had increased during the previous decade but has declined recently as a result of the recession; this also shows how the region has outperformed the nation in recent years.

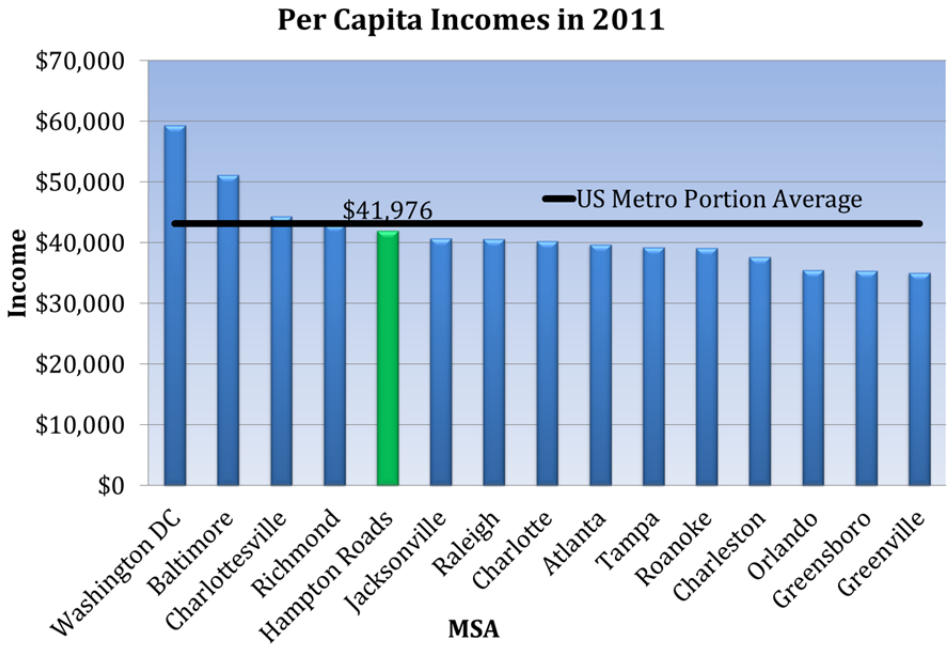
Figure 1.20 Per Capita Income in Hampton Roads and Competing Metro Areas

Why is it important?

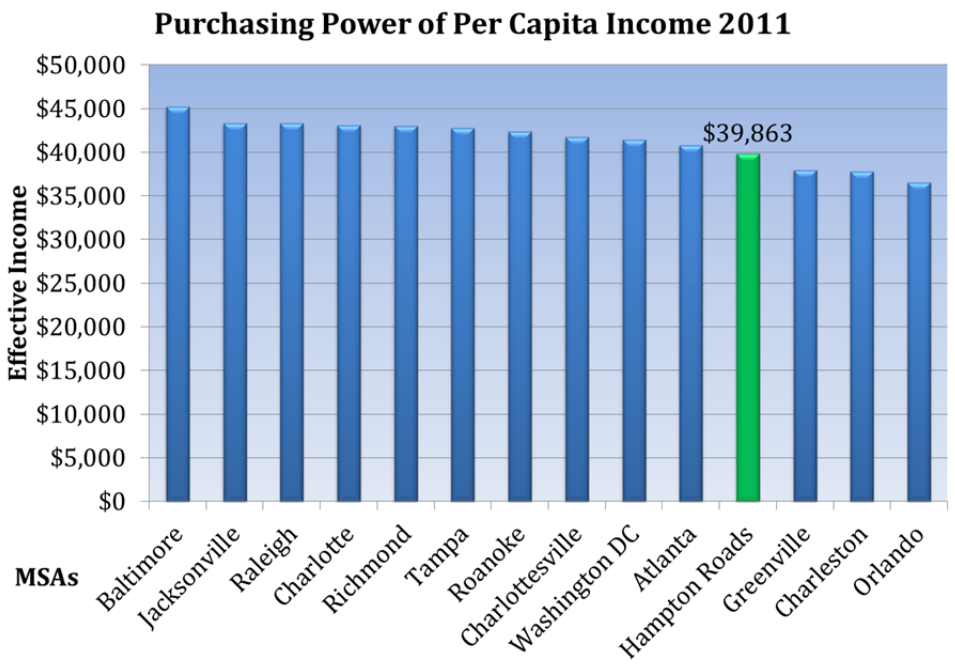
Per capita income is the most widely available statistic on economic well-being. Per capita income is estimated by dividing total personal income by the population of the region.

How are we doing?

Hampton Roads per capita income is slightly below the U.S. Metropolitan Portion Per Capita Income, but the region compares favorably to other Southeastern metropolitan areas.



1.21 Purchasing Power of Per Capita Income in Hampton Roads and Competing Metro Areas in 2011



Source: Bureau of Economic Analysis, The Council for Community and Economic Research, HRPDC

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 power parity.

How are we doing?

Regional increases in the cost of housing coupled with low income growth 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.

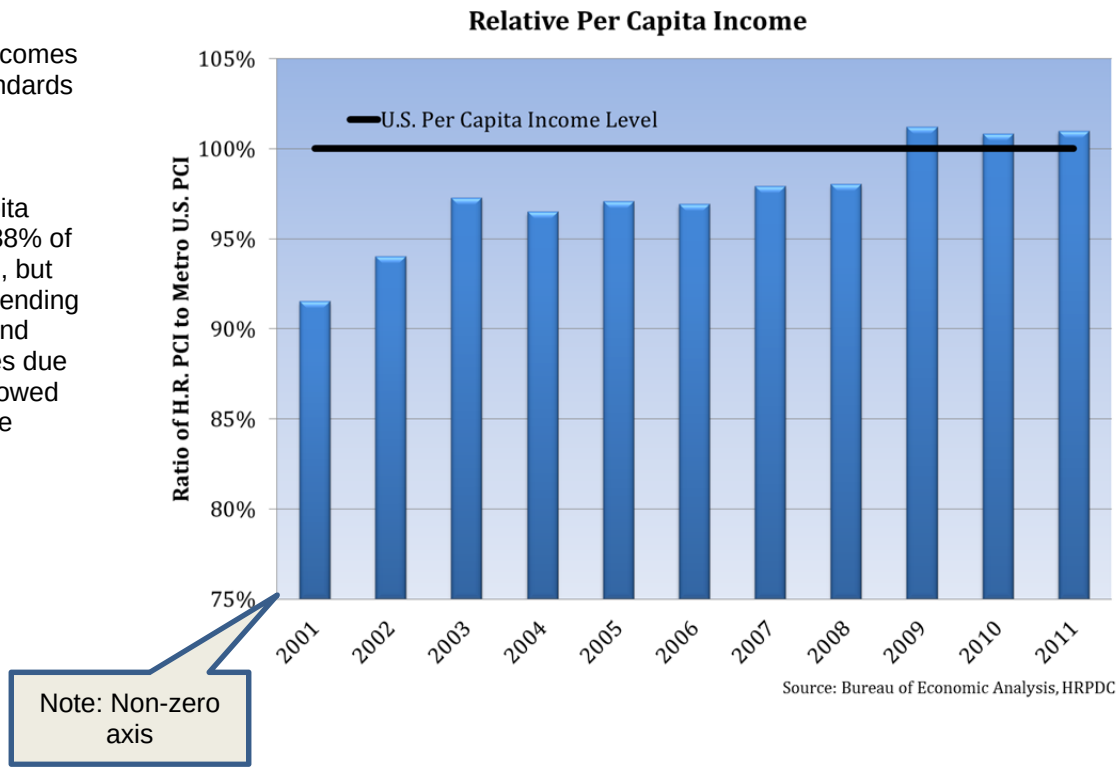
Figure 1.22 Hampton Roads Per Capita Income in Relation to the National Average

Why is it important?

Fluctuations in relative incomes reflect fluctuations in standards of living.

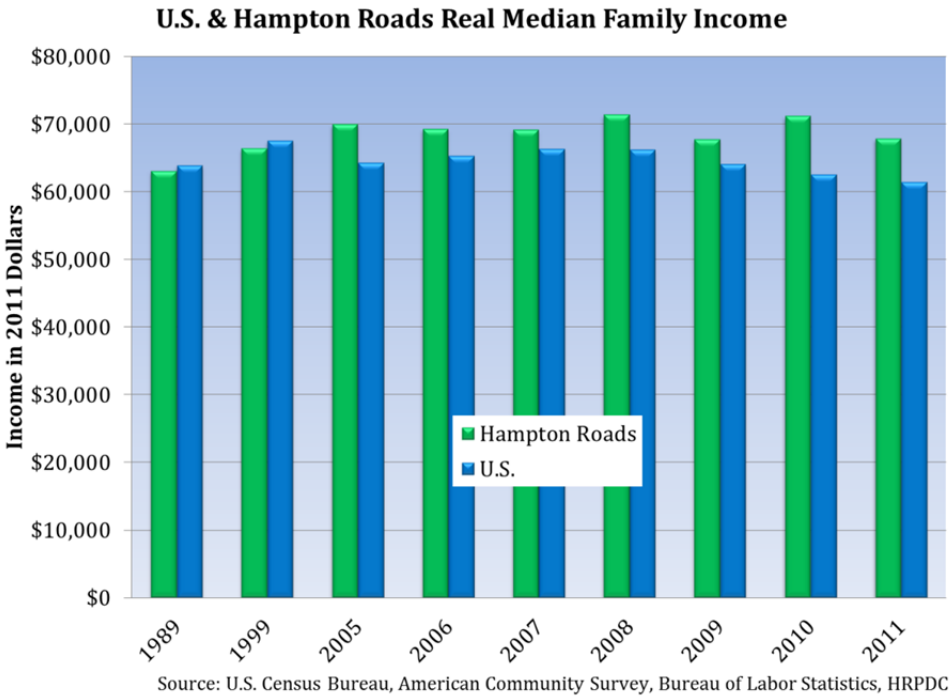
How are we doing?

Hampton Roads' per capita income (PCI) fell to just 88% of the national level in 2000, but high levels of defense spending during the past decade and stagnant national incomes due to the 2007 recession allowed this region to overtake the national income level.



Source: Bureau of Economic Analysis, HRPDC

Figure 1.23 Real Median Family Income



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

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. Regionally, families have maintained their income levels better than median family income on the national level.

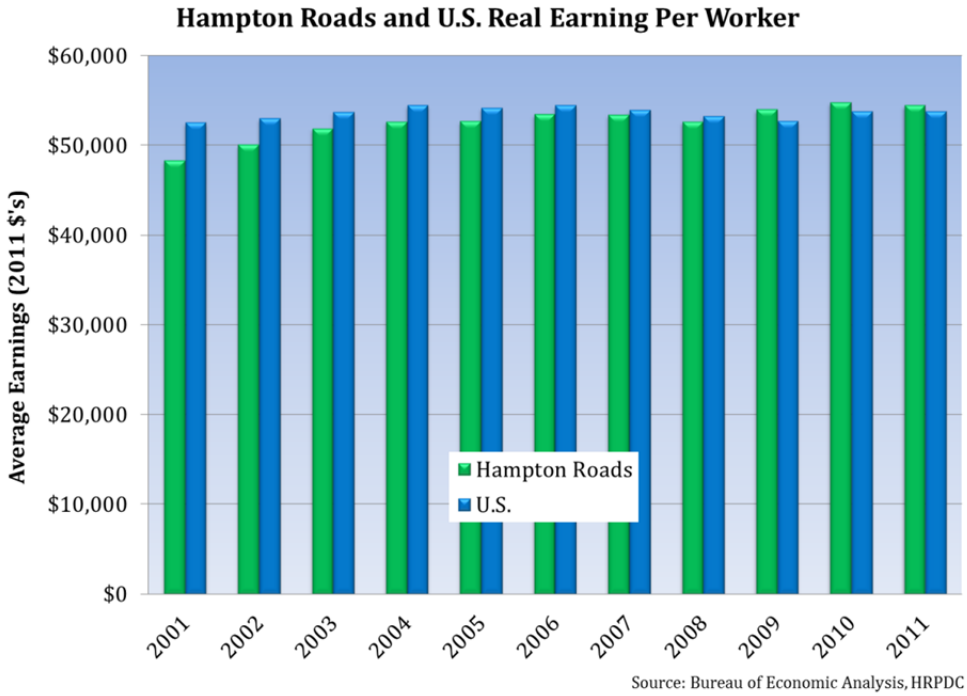
Figure 1.24 Earnings Per Worker in Constant Dollars

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 both signs of limited productivity.

How are we doing?

Inflation adjusted earnings-per-worker in Hampton Roads have made substantial gains over the past decade.



Source: Bureau of Economic Analysis, HRPDC

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SECTION II

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

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Industry

While attempts to diversify the regional economy continue, several industry clusters play a vital role in the economy. These basic sector industries bring vital outside dollars into the region providing an economic foundation and enabling economic growth within the region's non-basic sectors. Unfortunately, the relative importance of basic sector industries can make economies vulnerable to weakness when basic sector industries are in a state of decline (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 the Hampton Roads economy. While military employment as a percentage of total employment continues to decline, procurement dollars as well as the large wage and benefits packages military personnel receive, 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 disestablishment of Joint Forces Command (JFCOM) has emphasized the reality of defense cuts and the regional implications of the decision making process in Washington.

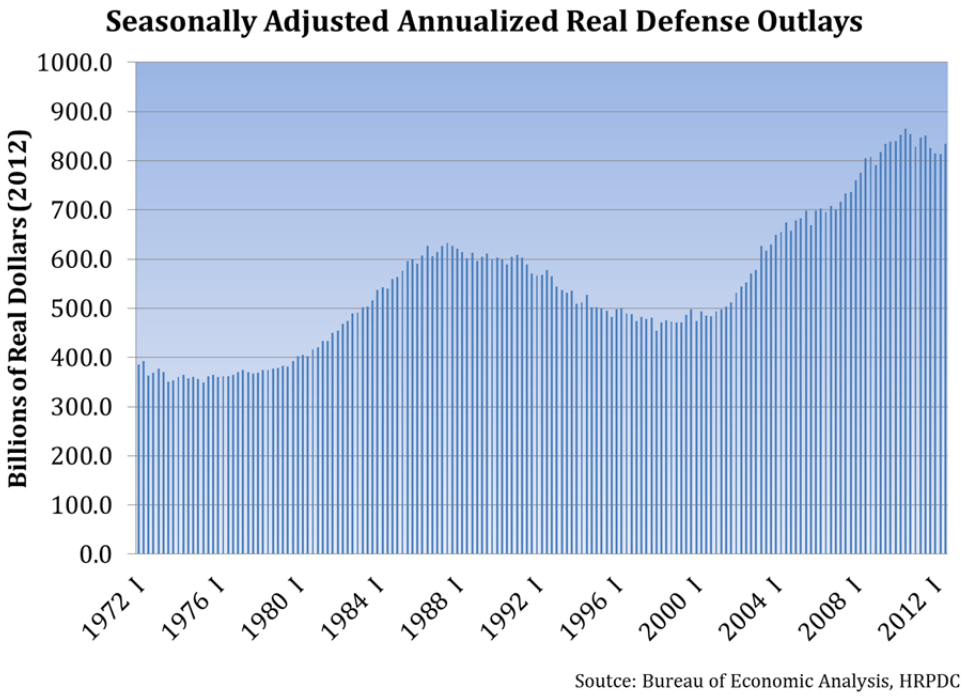
The ports represent another key industry for the region, generating direct employment at numerous port facilities across the region, as well as indirect employment in areas such as warehousing and logistics. The Port of Virginia experienced a significant decline in shipments as a result of the recession in 2001 and the recession that began in December 2007. The global economy is especially visible in port statistics as the decline in global demand is reflected in fewer vessel departures and a reduced number of twenty-foot-equivalent units being shipped. Coal loadings also rise and fall along with global demand and energy prices.

Another fundamental piece of the Hampton Roads economy is built upon the wealth of tourist venues in the region. The Historic Triangle, theme parks, and the region's significant water resources are a constant source of attraction both regionally, and from abroad. While belt tightening across the nation has had an impact on a number of the region's leisure and hospitality venues, tourism expenditures remain a strong source of employment opportunities and revenues.

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

This section of the Regional Benchmarking Study includes twenty three graphs that focus on several of the region's core industries.

Figure 2.1 Cycle of National Defense Spending



Soutce: Bureau of Economic Analysis, HRPDC

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 but has contracted recently in real terms as a result of the U.S. fiscal challenges.

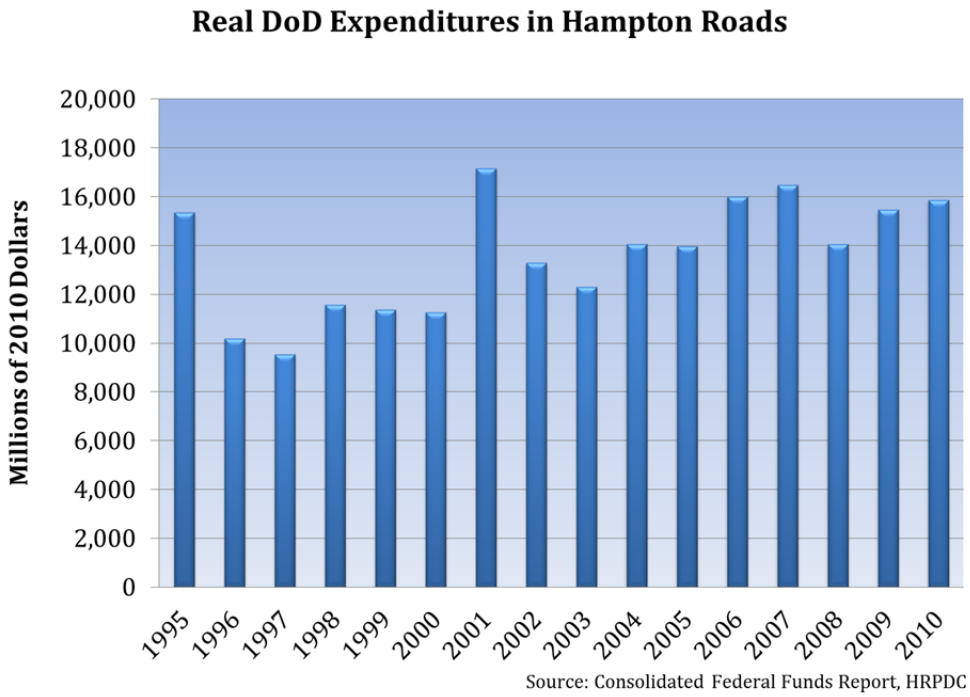
Figure 2.2 Inflation-Adjusted Department of Defense Spending in Hampton Roads

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.

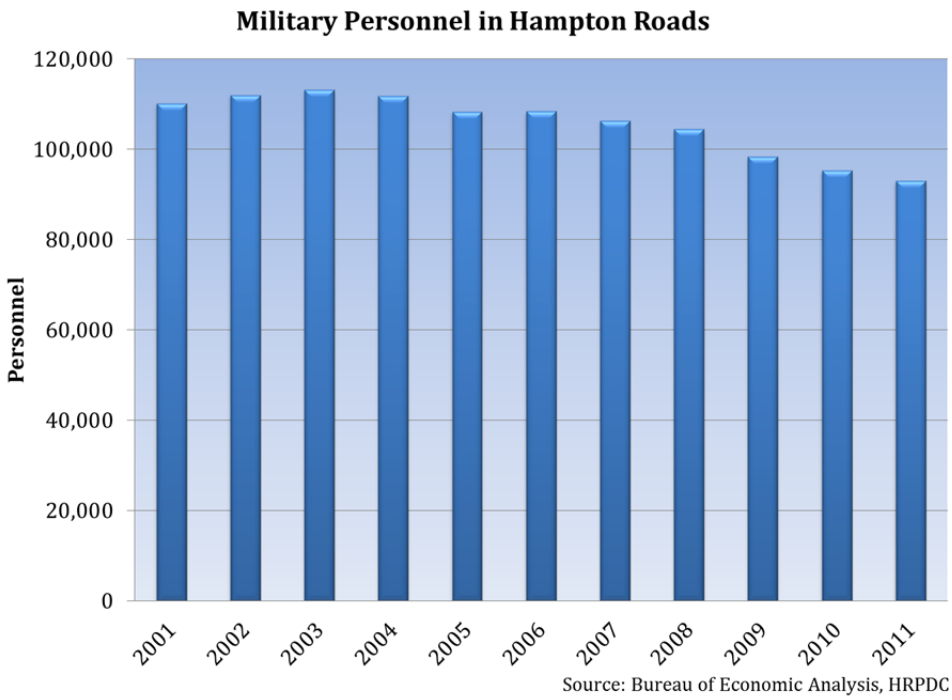
How are we doing?

Defense expenditures in Hampton Roads have stabilized the economy, and rising real defense spending in the region has moderated the effects of the current slowdown/recession. The disestablishment of JFCOM and efforts to move forces and ships based in Hampton Roads out of the regopm demonstrate the events that could significantly change defense spending in the region.



Source: Consolidated Federal Funds Report, HRPDC

Figure 2.3 Total Military Personnel 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, only to begin moderating again.

Figure 2.4 Concentration of Military Personnel

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 1994 to 1998. Military's percentage of total employment has been steadily declining for the past 10 years.

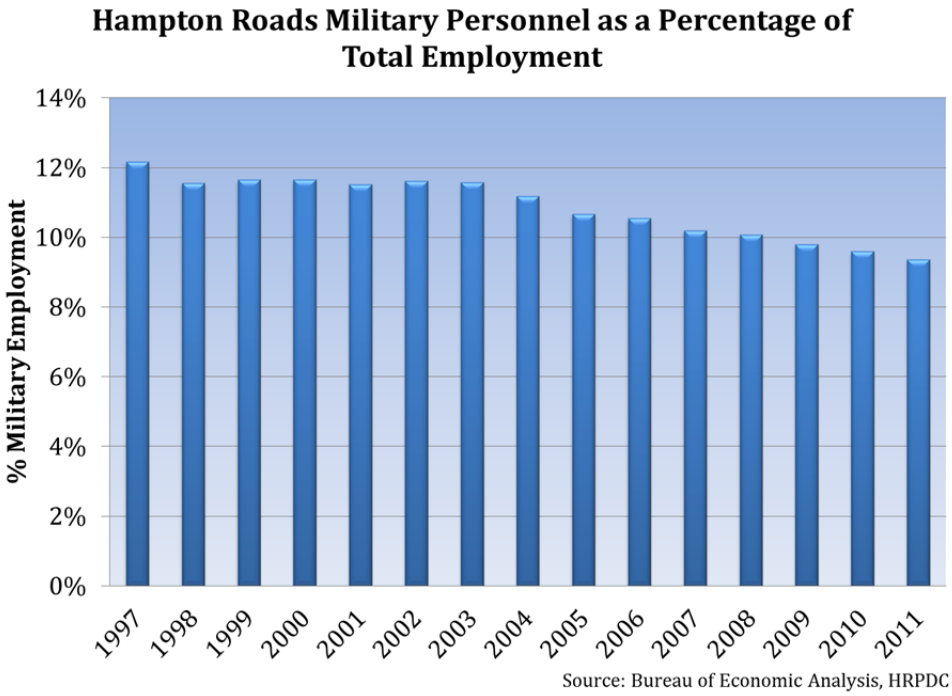
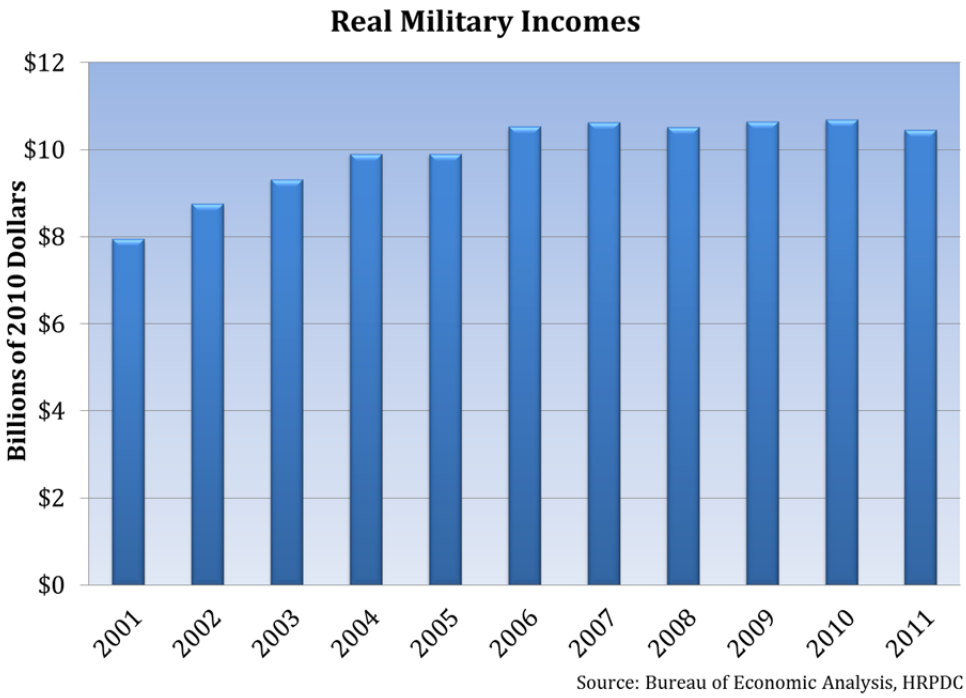


Figure 2.5 Inflation Adjusted Military Incomes



Source: Bureau of Economic Analysis, HRPDC

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 incomes increase, so do contributions to the local economy.

How are we doing?

Military incomes have risen substantially from 1998 due in part to increases in military pay, but real incomes did not rise between 2006 and 2008 due to nationwide inflation. Since then regional military incomes have held steady.

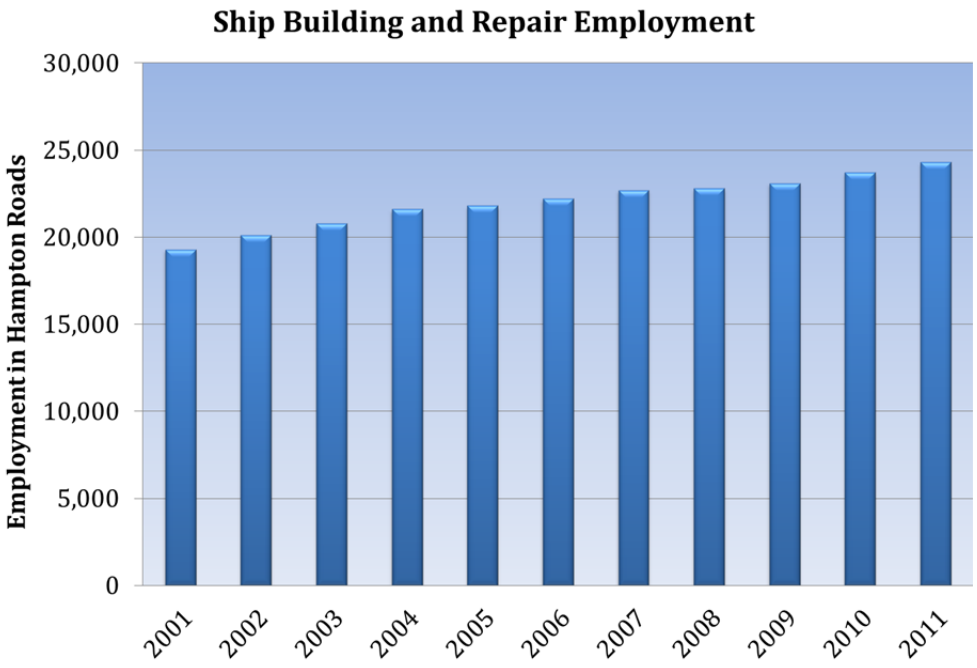
Figure 2.6 Total Ship Building and Repair Employment in Hampton Roads

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.

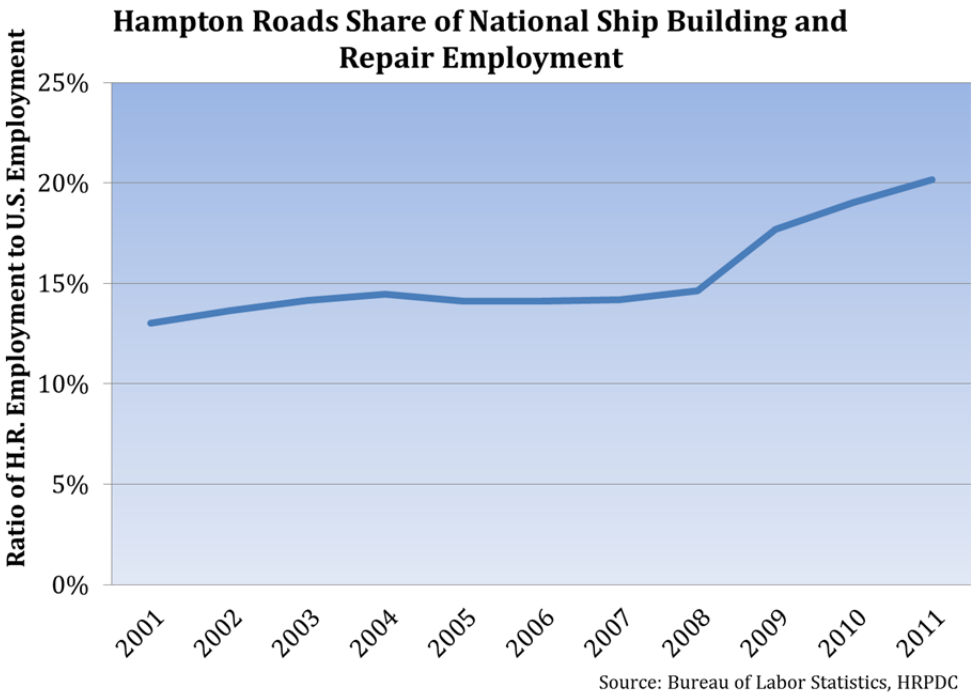
How are we doing?

Ship repair in Hampton Roads declined over the latter half of the nineties before beginning to grow slowly over the past 9 years. The shipbuilding and repair industry is closely tied to military contracts.



Source: Bureau of Labor Statistics, HRPDC

Figure 2.7 Concentration of Ship Building 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. specialized in ship repair.

How are we doing?

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

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?

11.8% 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.

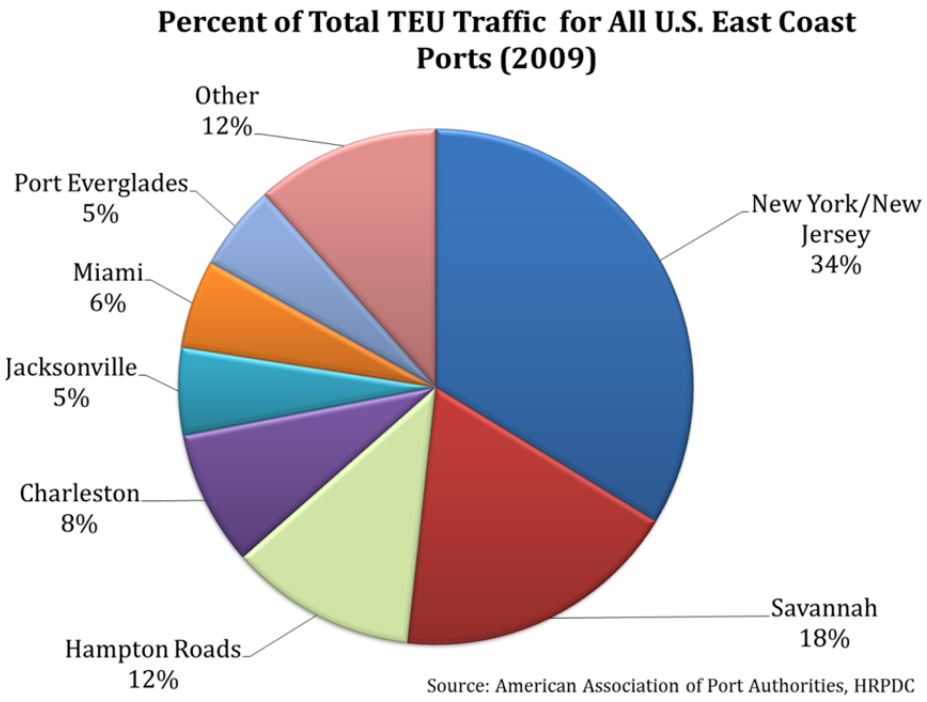
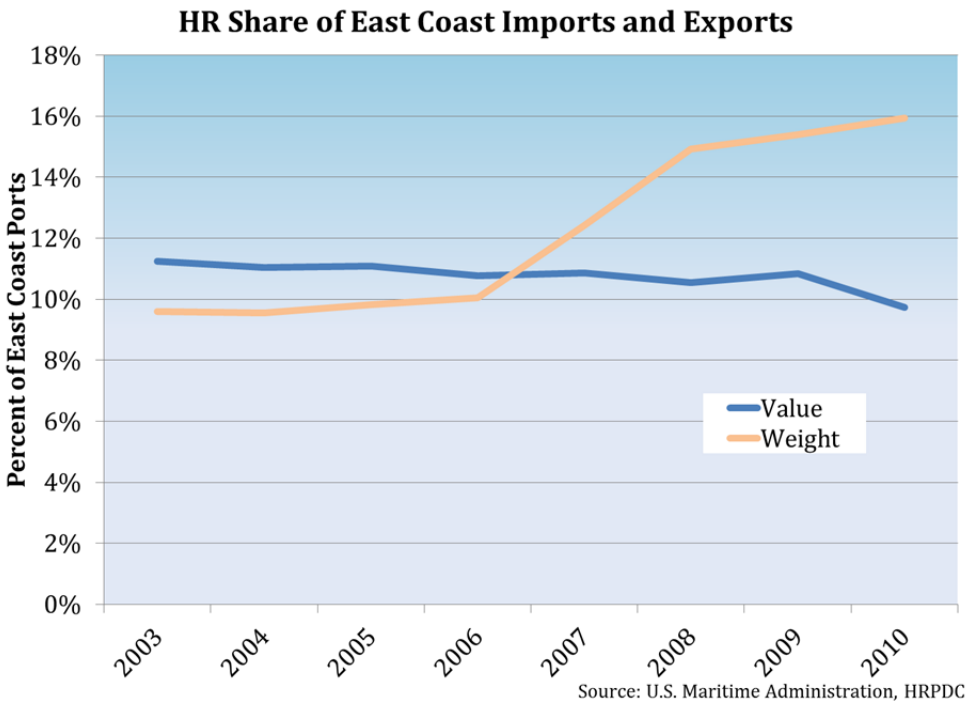


Figure 2.9 Hampton Roads Market Share of Imports and Exports at East Coast Ports



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. The large amount of coal that has been shipped out of the port explains why the region is gaining market share in weight of goods transported, but not in value.

Figure 2.10 Foreign and Domestic Vessel Calls in Hampton Roads

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 is largely tied to the global demand for goods which rests on the overall economic health of the world. There have been large declines in port calls during the past two recessions. The number of ships should stay flat even as cargo volumes increase as ships continue to get larger, as shippers take advantage of economies of scale.

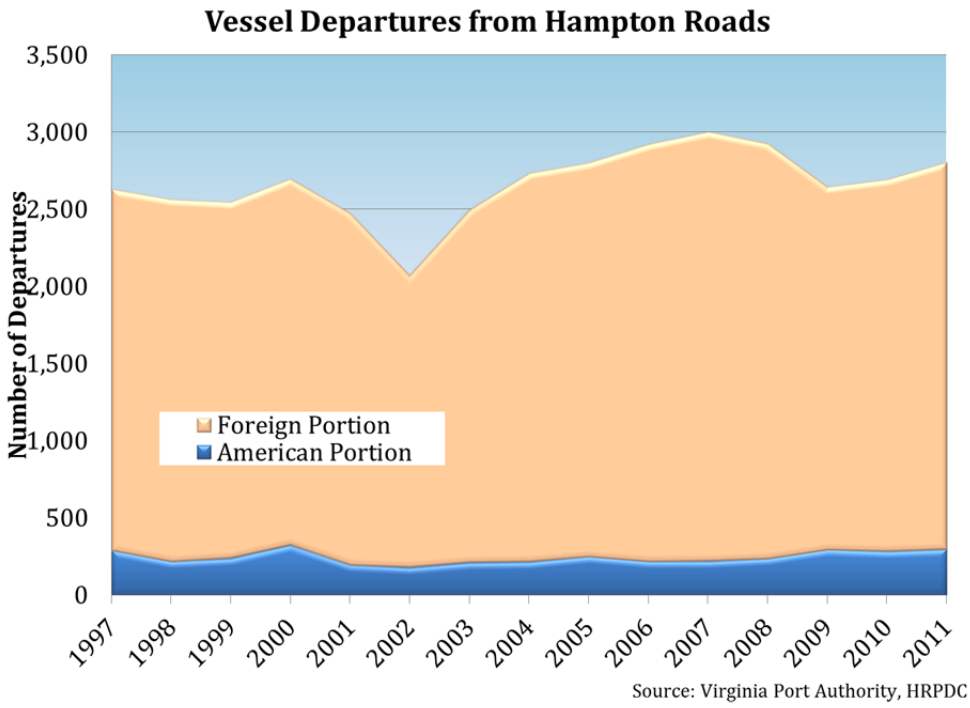
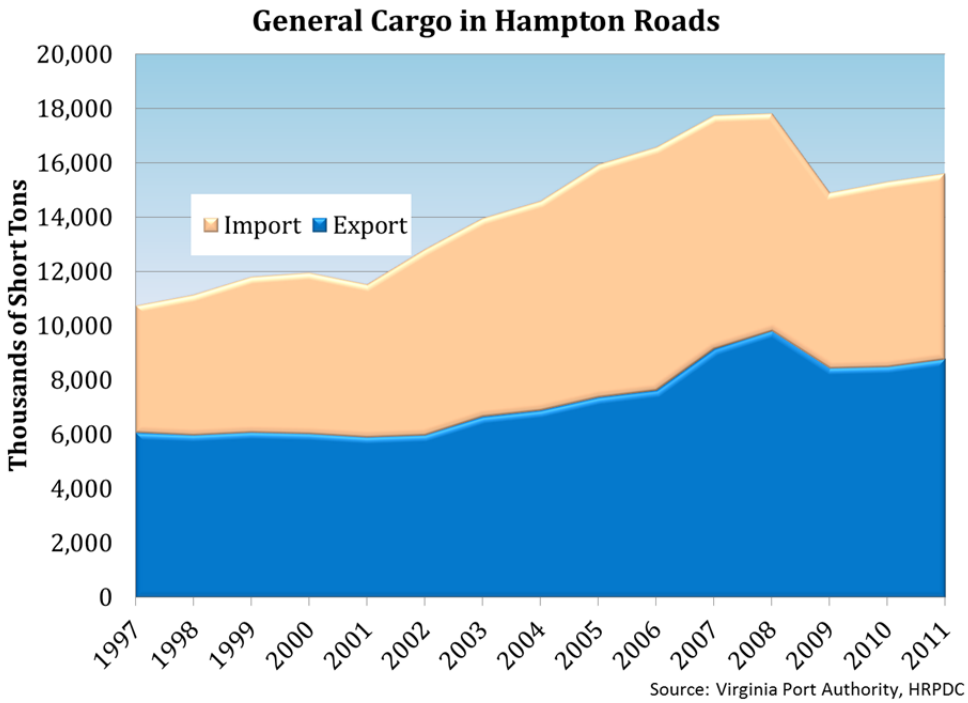


Figure 2.11 General Cargo Imports and Exports



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.They have been recovering over the past two years, but at a slower rate of growth than prior to the recession.

Figure 2.12 Twenty Foot Equivalent Units through the Port of Virginia

Why is it important?

Increasingly world trade is conducted through the use of containerized units that allow a high degree of automation for the shipping companies, and growth in TEUs shows that Hampton Roads continues to display a high level of productivity in that aspect of shipping.

How are we doing?

Container traffic followed a similar pattern to general cargo, with a decline in 2008 and a steeper fall in 2009 as a result of the recession. Container traffic has recovered somewhat over the past two years, but is still below the 2007 peak.

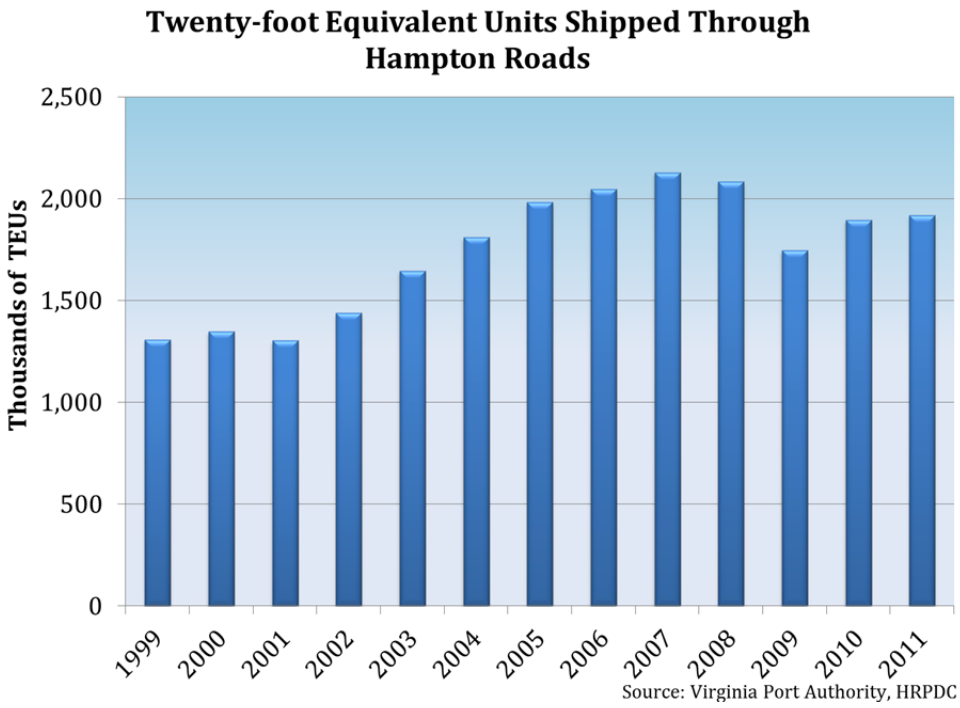
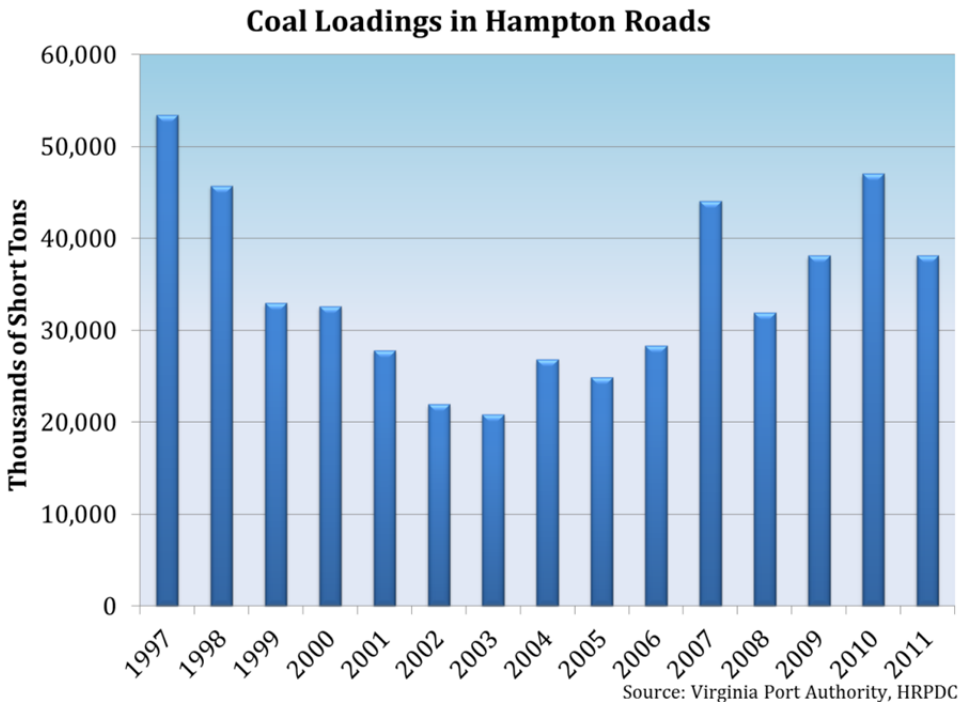


Figure 2.13 Coal Loadings



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. The demand for coal will be closely tied to the world economy and world energy prices, but it should remain a major export for Hampton Roads.

Figure 2.14 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 Hotel Sales, but that growth leveled out in August 2007, presumably because of the slowing economy and increasing fuel prices.

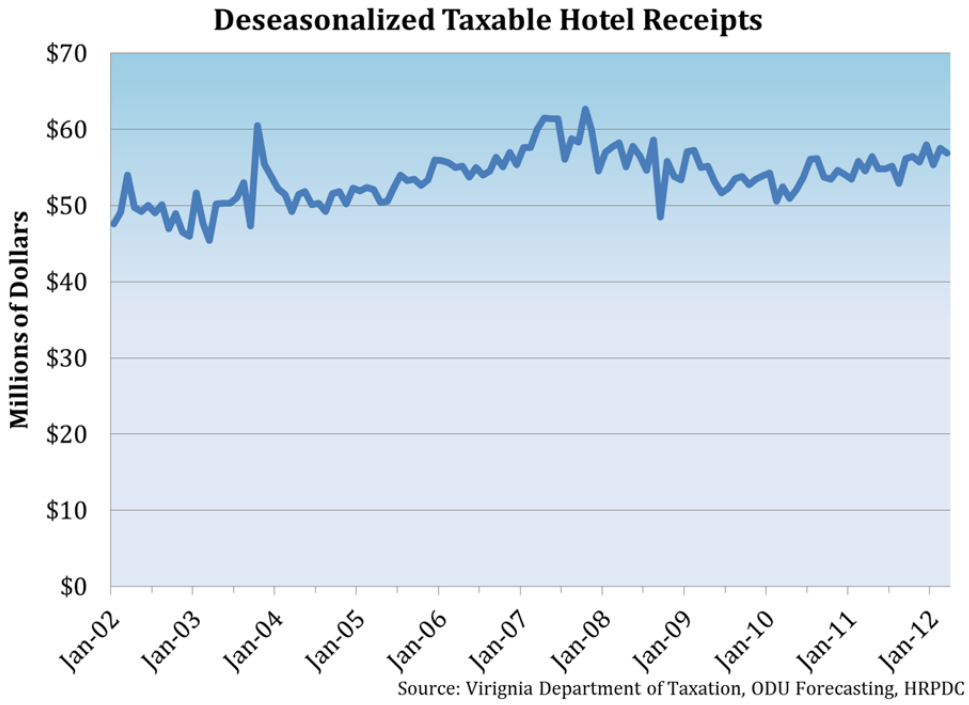


Figure 2.15 Employment in Hampton Roads Leisure and Hospitality Industry

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 regional leisure and hospitality industry had been steadily increasing since 2001, but has declined off the previous high due to the prolonged weakness from the recession.

Figure 2.16 Tourism Expenditures in Hampton Roads

Why is it important?

The Virginia Tourism Corporation estimates tourism expenditures in each locality, which measures the impact of the tourism industry on the local economy. As one of the region's major employment clusters, it is important that tourism continues to contribute to growing the regional economy.

How are we doing?

Following the same pattern as leisure and hospitality employment, tourism expenditures peaked in 2008 during the first year of the recession and have declined in 2009. They have recovered slightly in both 2010 and 2011.

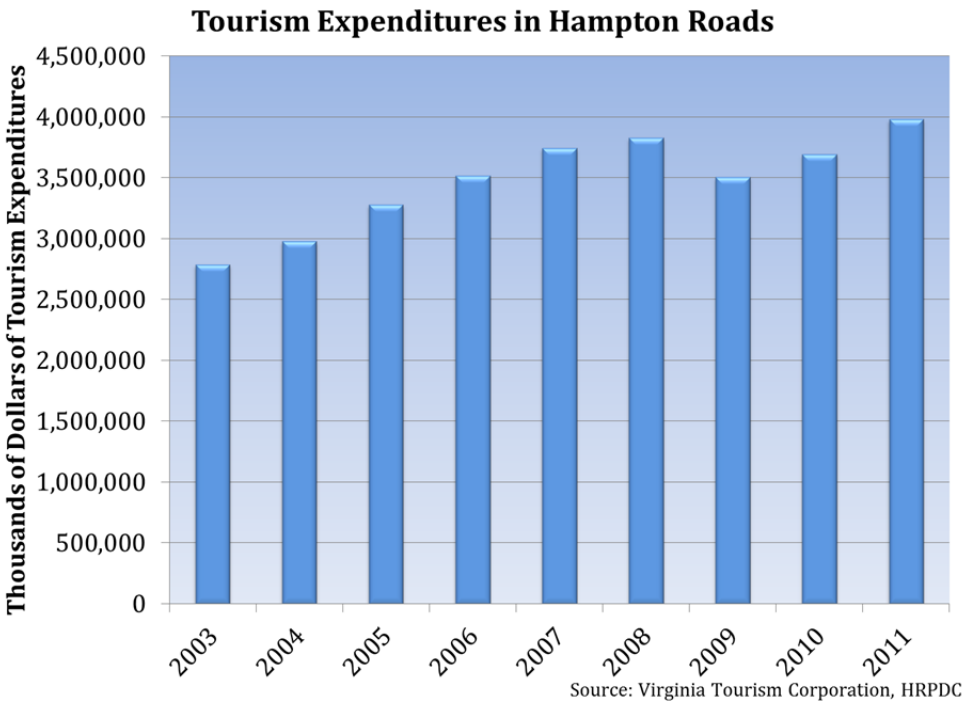


Figure 2.17 Construction Employment in Hampton Roads

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 from 2003 to 2006, construction employment did not surge, and this has led to a smaller decline than would be expected given the size of the housing correction, but the decline has continued even past the end of the national recession.

Figure 2.18 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.

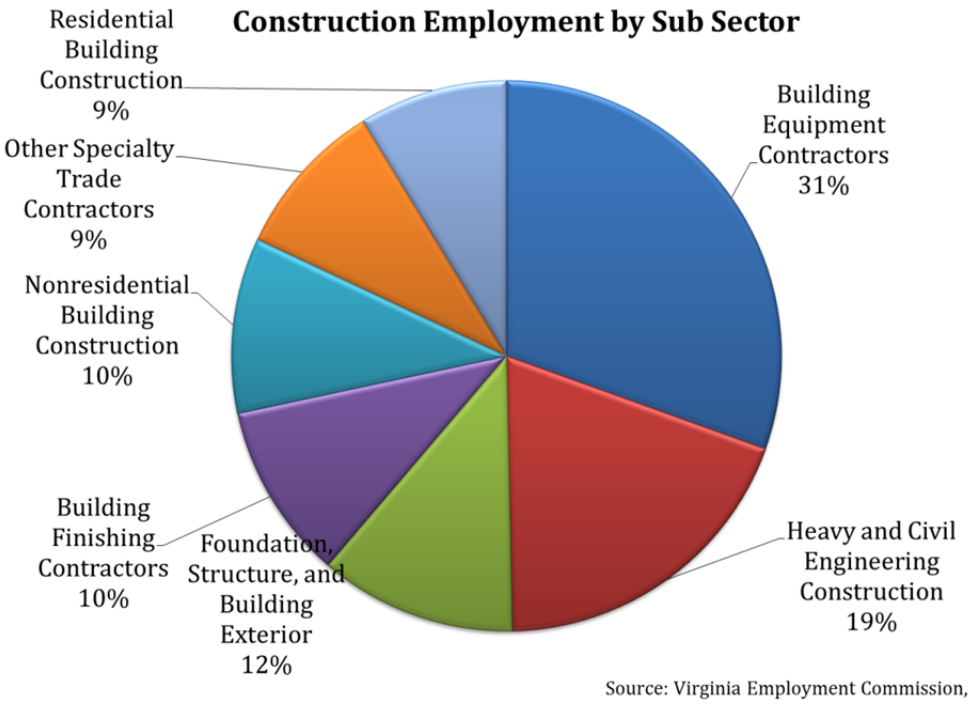
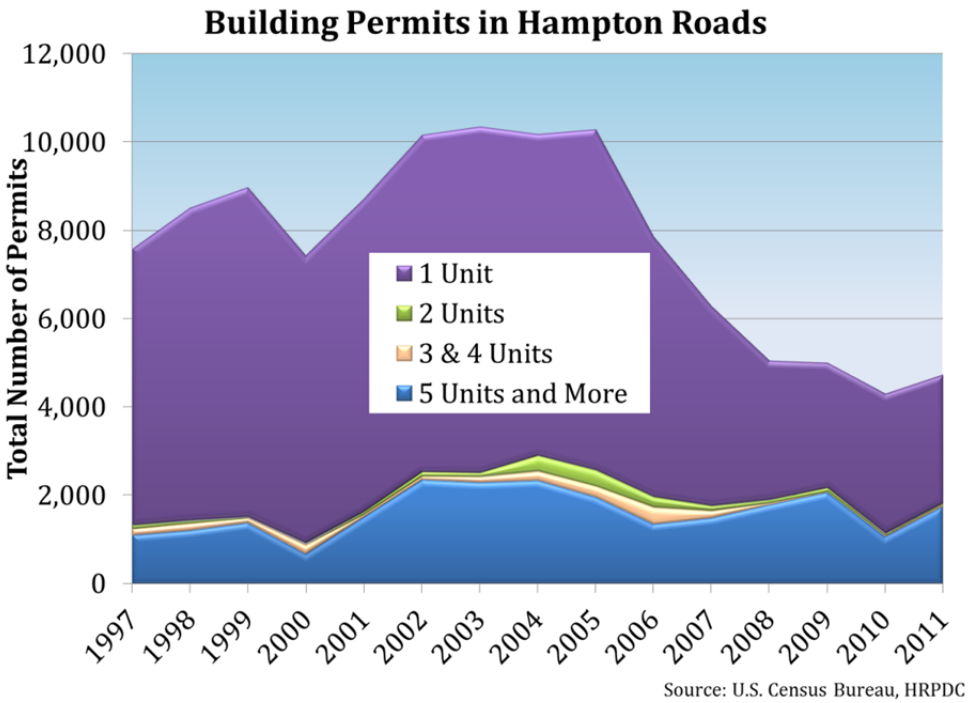


Figure 2.19 New Building Permits Issued in Hampton Roads



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 weakness in the residential construction market.

Figure 2.20 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 fell significantly after 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. The value of single family permits rebounded some in 2010 but declined in 2011.

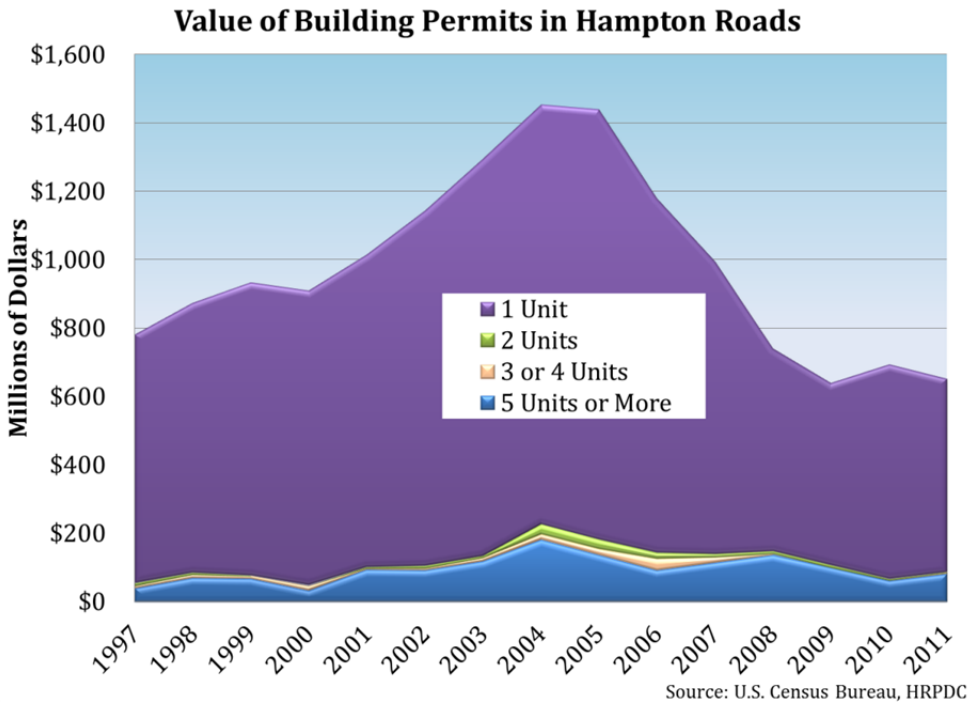
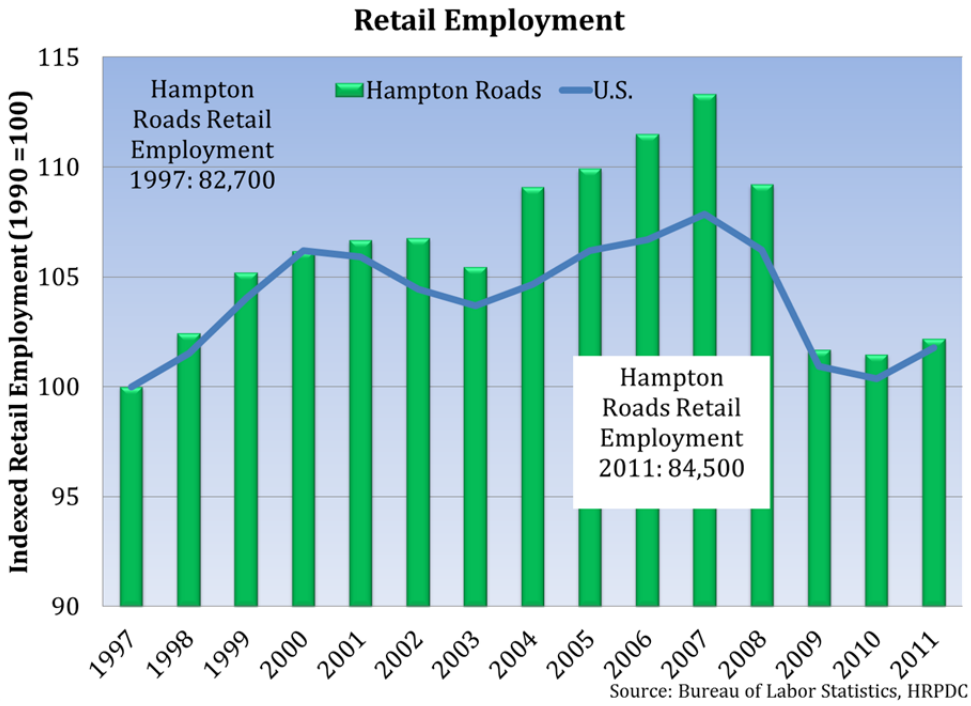


Figure 2.21 Total Retail Employment in Hampton Roads



Why is it important?

Retail employment tends to be very cyclical in nature, but the relative level of retail employment indicates the strength of the retail industry in the region.

How are we doing?

Employment in the retail sector remained relatively stable over the past two decades both nationally and in the region. The region only added 3,500 retail jobs over the past two decades. Retail employment has decreased substantially since 2007.

Figure 2.22 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.

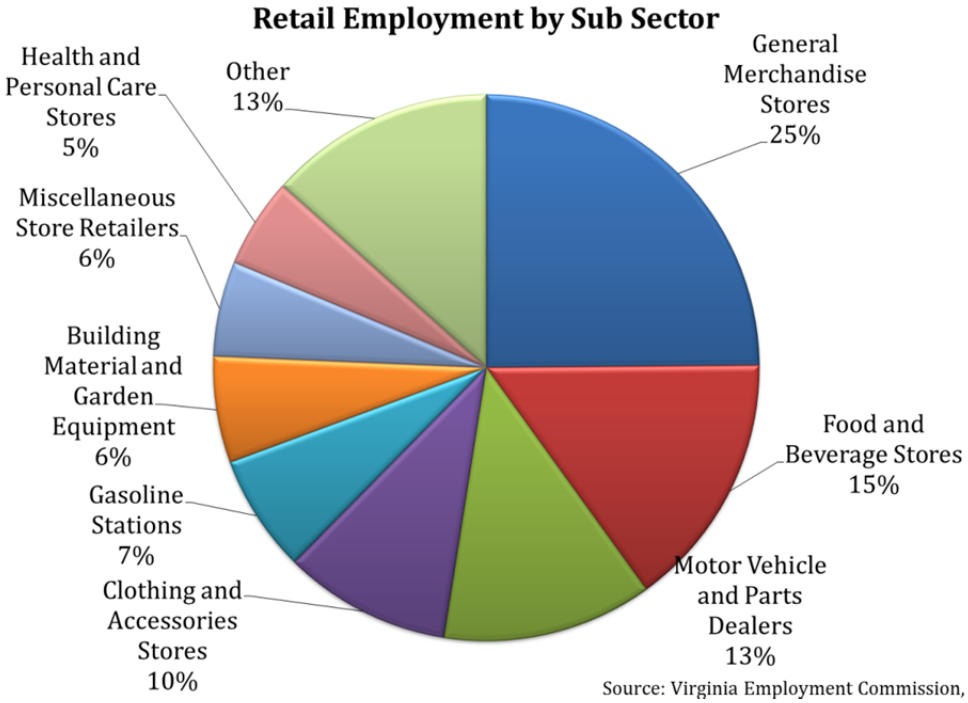
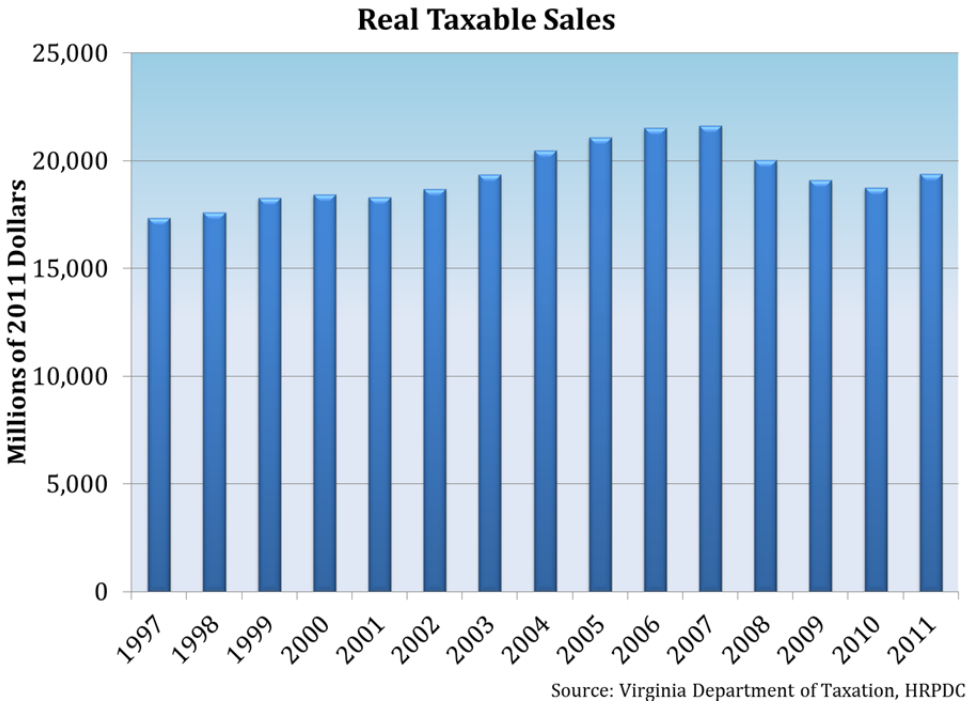


Figure 2.23 Inflation Adjusted Taxable Sales in Hampton Roads



Source: Virginia Department of Taxation, HRPDC

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 three years in a row as a result of the size and duration of the most recent recession, which further constrained local economic activity. 2011 was the first year that retail sales expanded since the 2007 recession.

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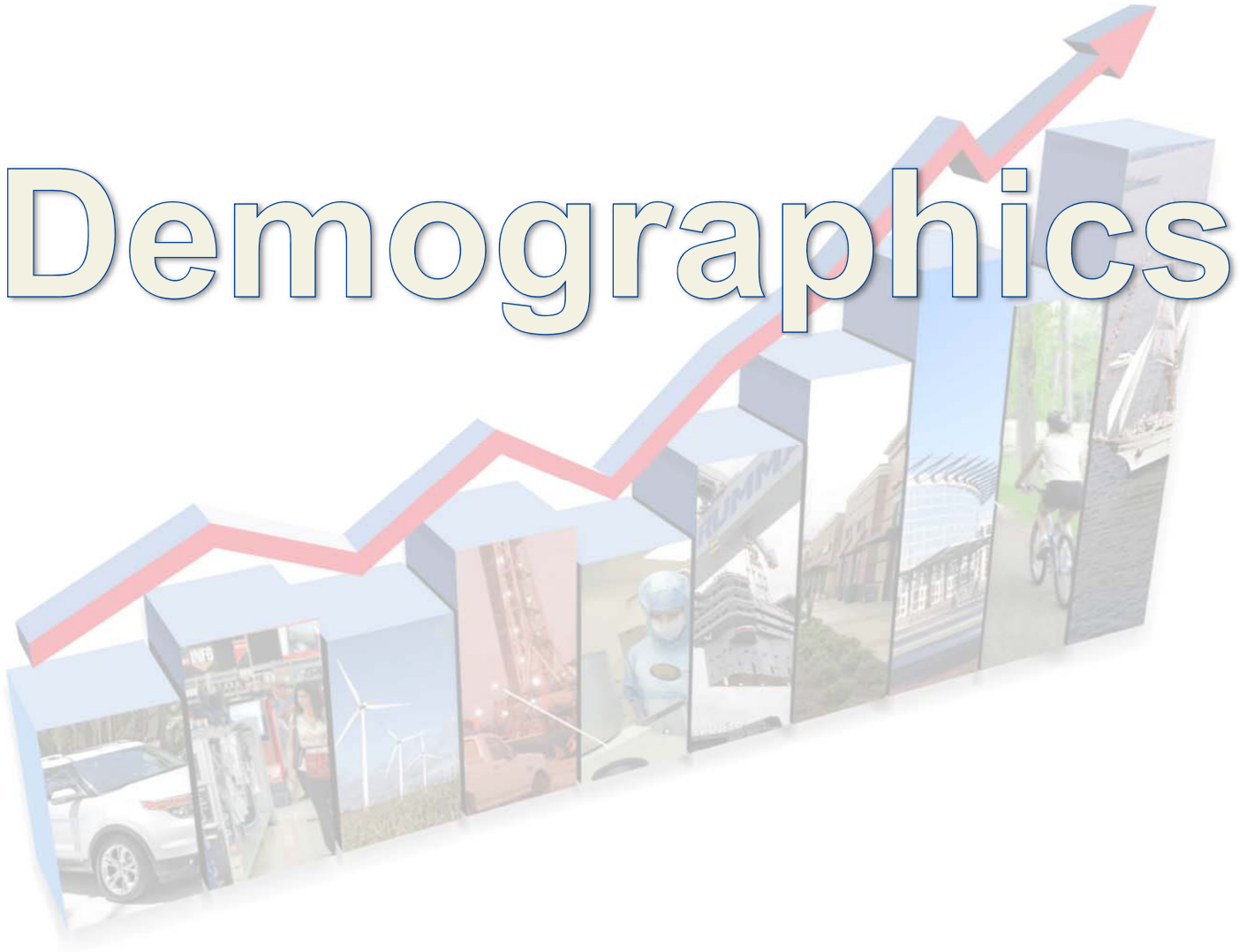
SECTION III



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

Section III Table of Contents

Demographics

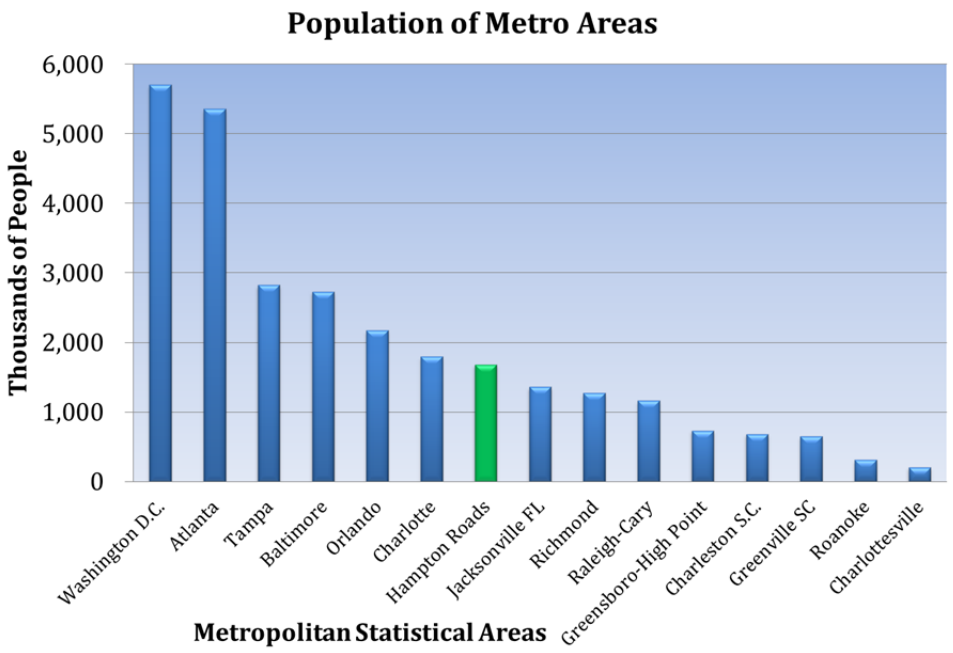
In 2011, Hampton Roads was the 36th largest metropolitan region in the United States in terms of population, down from 33rd just six years earlier. The region has experienced very moderate population growth, with regional growth rates below the national level for 14 of the past 15 years and a net out-migration for 11 of the past 15 years. 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 those aged 65 years 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 aged population (20-64).

Regionally, the number of females in Hampton Roads continues to be greater than the number of males by approximately 4.5%. During the past fifteen years, the African American population grew strongly, leveling off over the past five years. More recent data suggests that regional population growth has been relatively proportionate across demographic categories.

This section of the Regional Benchmarking Study includes ten graphs on demographic statistics in Hampton Roads.

Figure 3.1 Population of Hampton Roads and Competing Metro Areas in 2011



Source: U.S. Census Bureau, HRPDC

Why is it important?

Population provides a context for understanding many economic and social indicators.

How are we doing?

With a population of 1.679 million in 2011, 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.

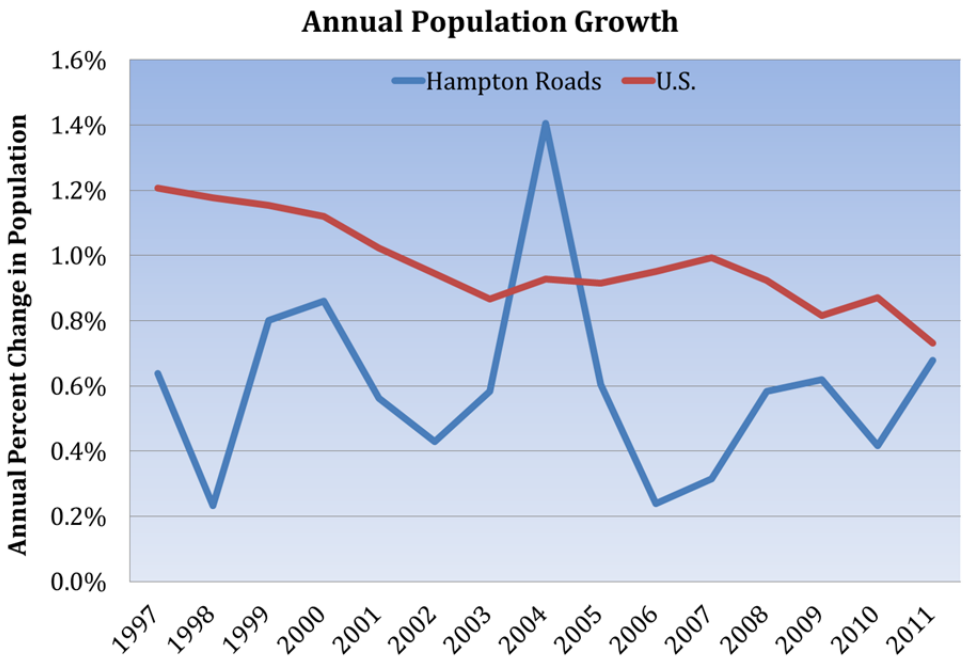
Figure 3.2 Population Growth Rates in Hampton Roads and the United States

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.

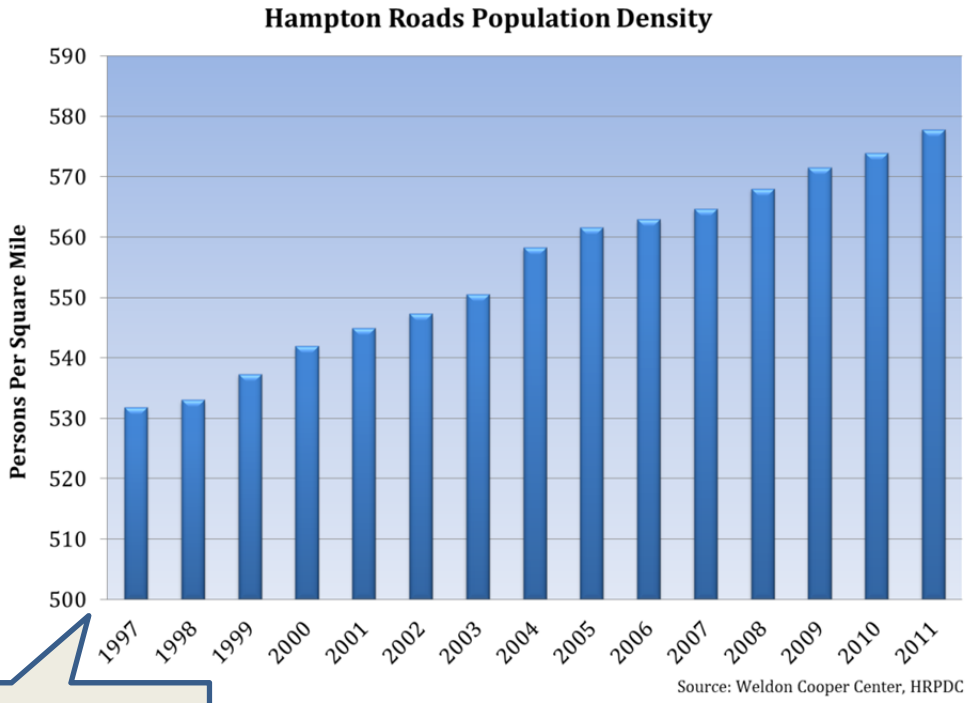
How are we doing?

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.



Source: Weldon Cooper Center, U.S. Census Bureau, HRPDC

Figure 3.3 Hampton Roads Population Density



Note: Non-zero axis

Why is it important?

Population density directly impacts the usage of government services in the region.

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 and the second half of the aughts with a period of high volatility between. This outmigration is the reason Hampton Roads has a low level of population growth.

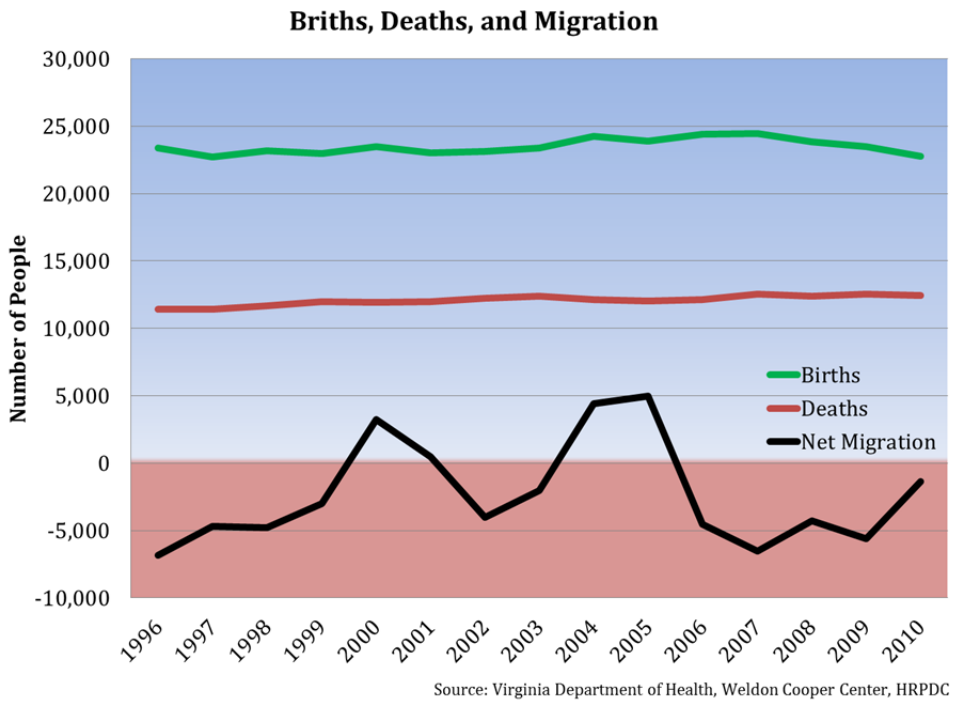
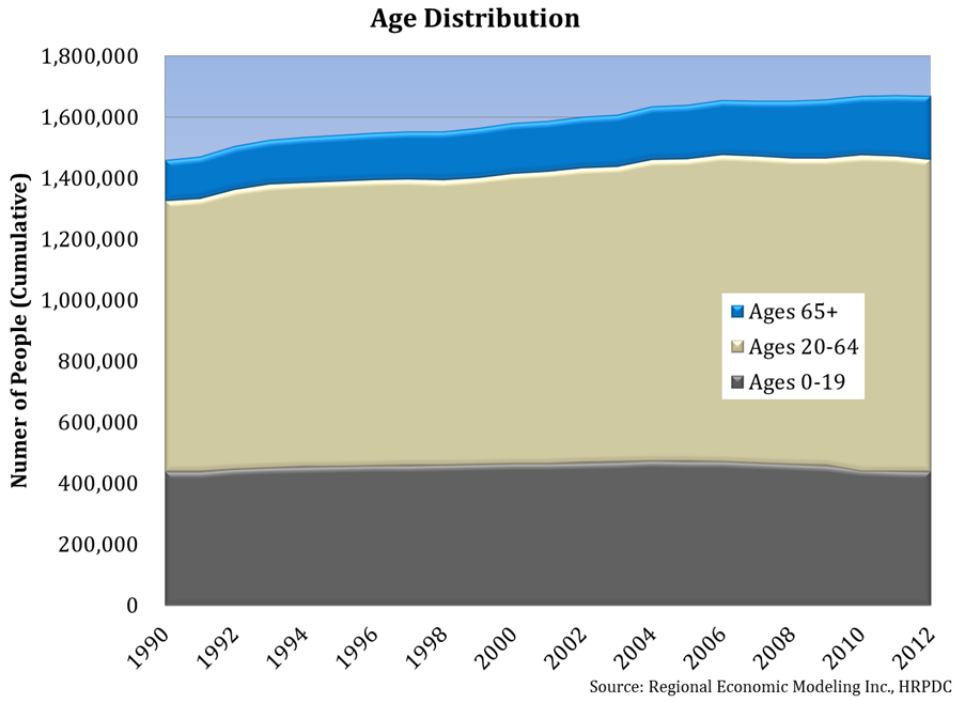


Figure 3.5 Age Distribution of Hampton Roads Population



Why is it important?

The age distribution of a region's population 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 Dependency Ratio in the U.S. and Hampton Roads

Why is it important?

This shows the extent to which the working age population supports dependents (both children and adults). The size of the dependency ratio has a causal link to GDP growth.

How are we doing?

Hampton Road's dependency ratio had been declining slowly since its peak in 1998, and then declined rapidly recently. The nation had seen a more significant decrease in the dependency ratio driven primarily by declining birthrates. The dependency ratio both in Hampton Roads and the nation will increase as the population ages.

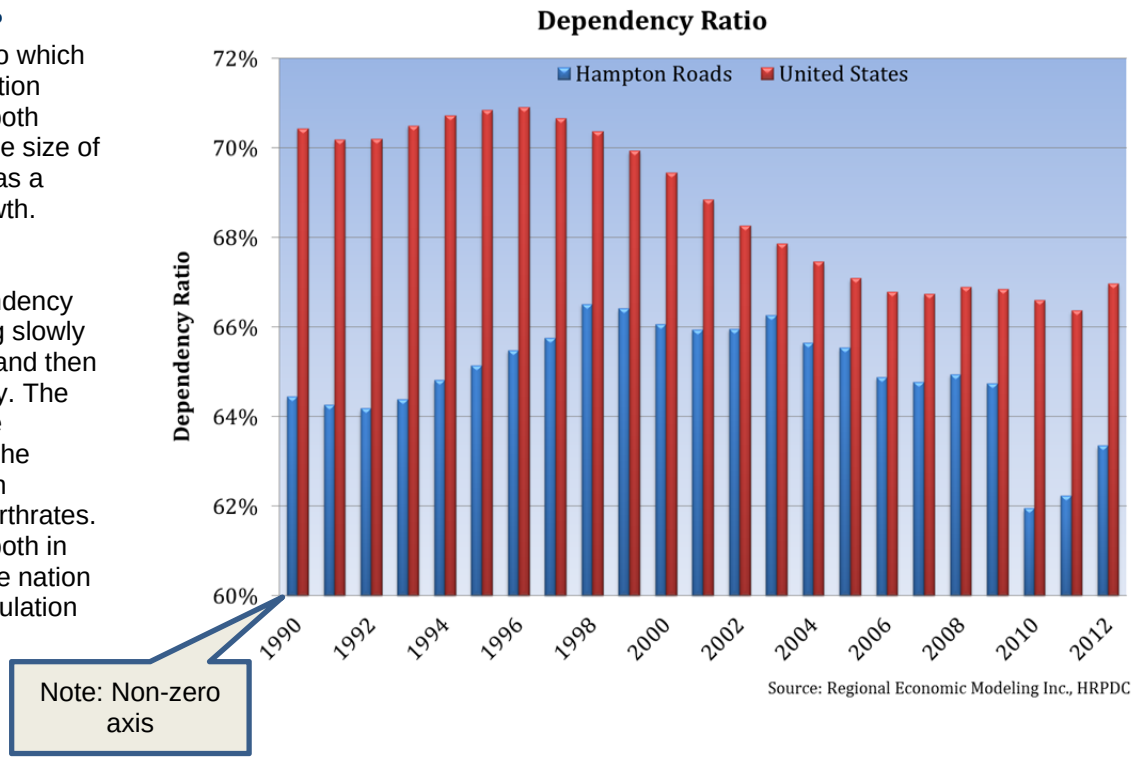
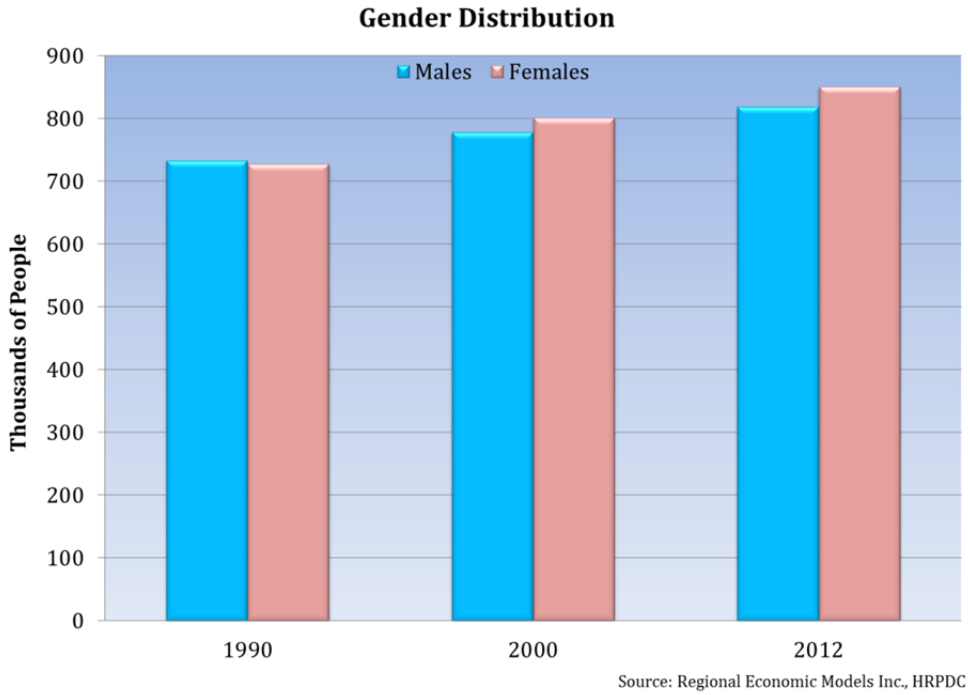


Figure 3.7 Gender Distribution for the Hampton Roads Population



Source: Regional Economic Models Inc., HRPDC

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.

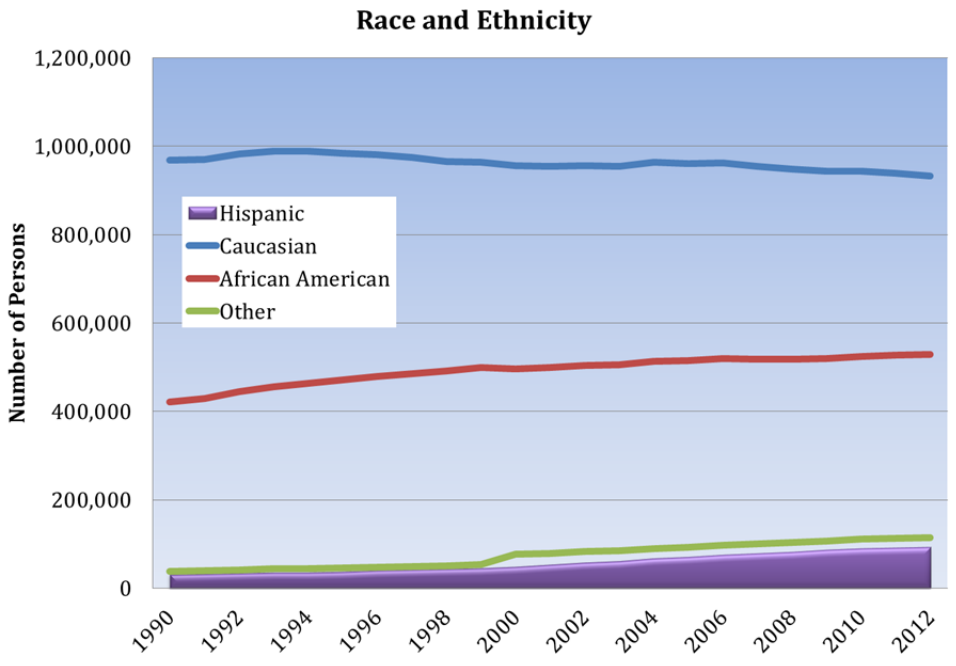
Figure 3.8 Race and Ethnicity in Hampton Roads

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.

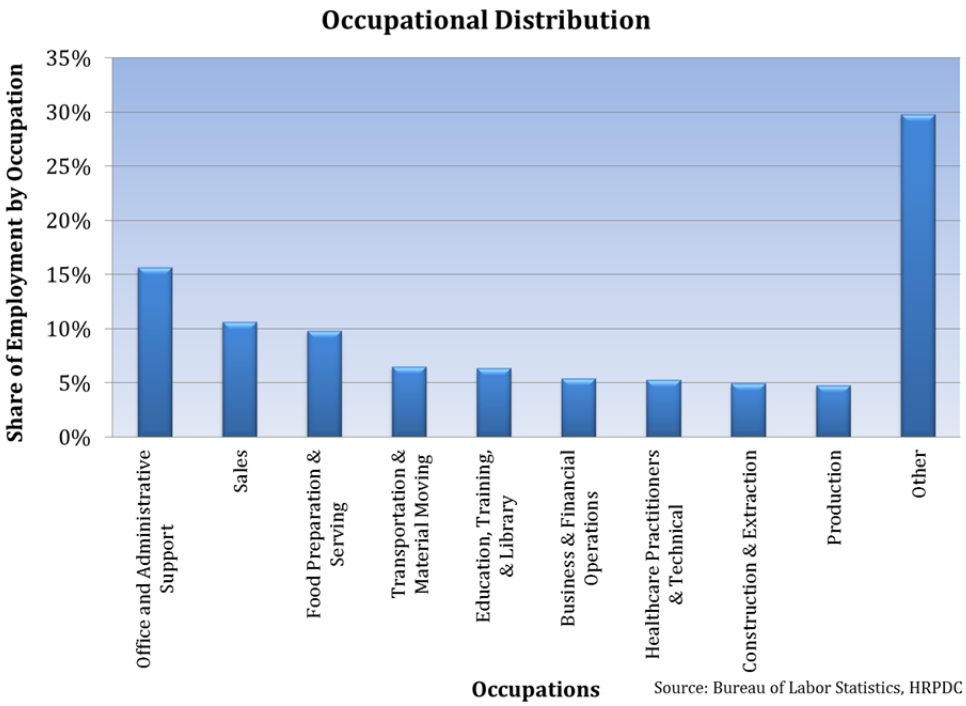
How are we doing?

Hampton Roads has an above average portion of African Americans when compared to other MSAs. Conversely, Hampton Roads population has very few other minorities or persons of Hispanic ethnicity.



Source: Regional Economic Modeling Inc., HRPDC

Figure 3.9 Distribution of Occupations in Hampton Roads



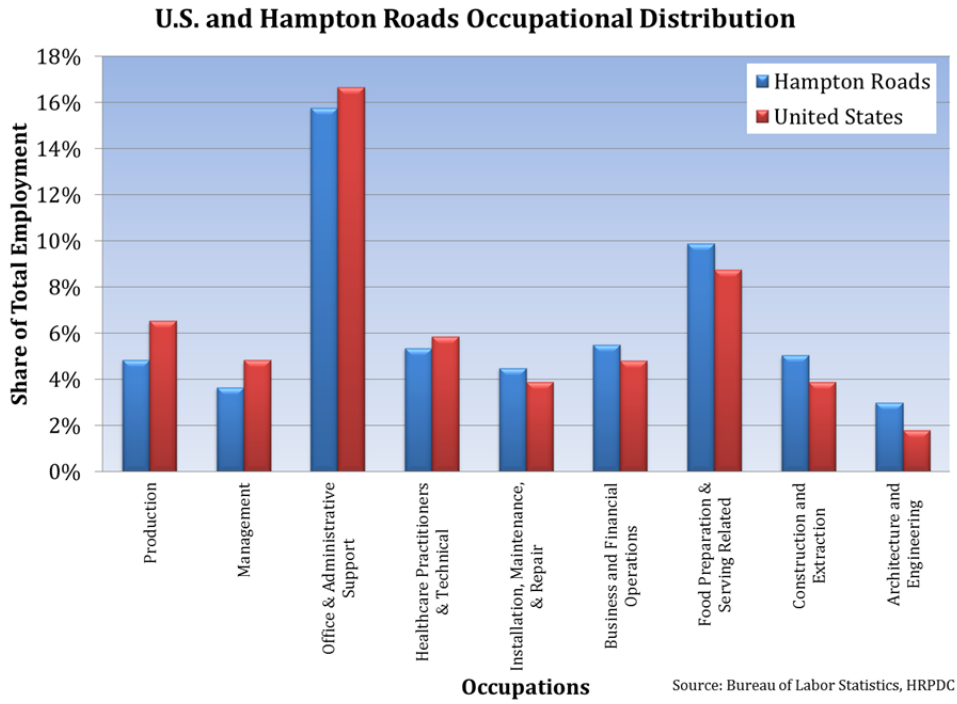
Why is it important?

Employment is often classified by industry, although persons seeking employment typically search by occupation. Figure 3.9 illustrates the occupational and skills distribution of persons working in Hampton Roads.

How are we doing?

Roughly 15.8% 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.

Figure 3.10 Comparative Occupation Percentage Hampton Roads and U.S.



Why is it important?

Employment is often classified by industry, although persons seeking employment typically search by occupation. The differences between the occupation mix in Hampton Roads and the U.S. indicate some of the differences in the underlying economy.

How are we doing?

Hampton Roads has fewer individuals in production, management, and office occupations than the nation as a whole, but a larger share of architecture and engineering occupations.

SECTION IV

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

Section IV Table of Contents

Housing

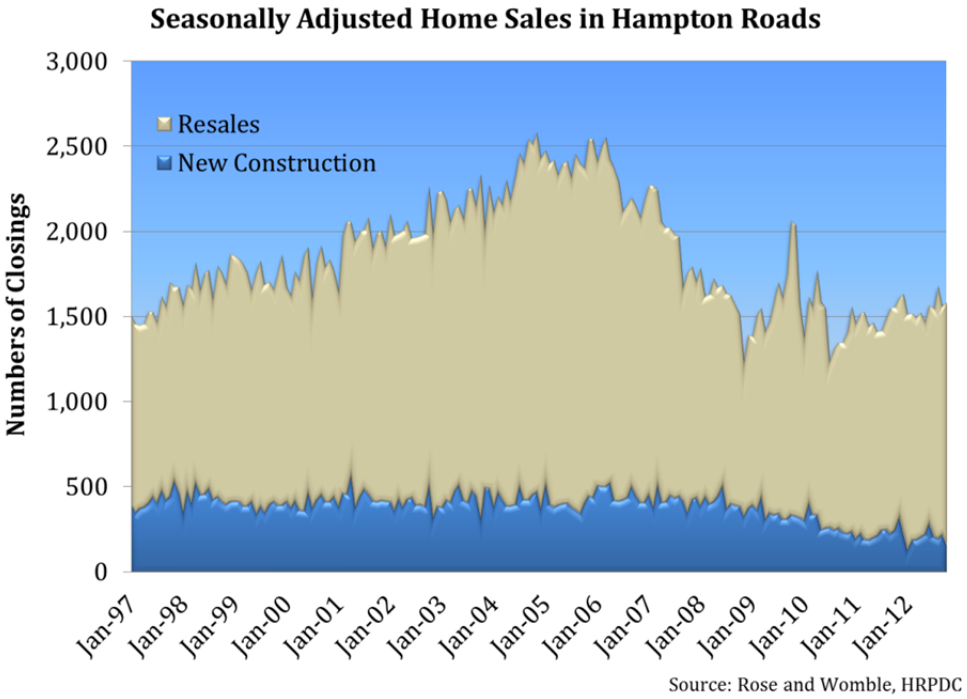
Construction and the housing market play a large role in the quality of life in a community. Residential construction traditionally plays a major role in bringing the nation and region out of recessions, as new home sales and the re-sale of existing homes contribute to spending on residential fixed investment 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.

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 spike in housing prices midway through the previous decade. 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.

This section of the Regional Benchmarking Study includes seven graphs related to housing in Hampton Roads.

Figure 4.1 Pre-Owned and New Construction Home Sales in Hampton Roads



Source: Rose and Womble, HRPDC

Why is it important?

Regional home sales react to both local and national market pressures. Large increases in new construction sales often point to an 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. Sales of existing and new homes have spiked several times because of the home buyer tax credit.

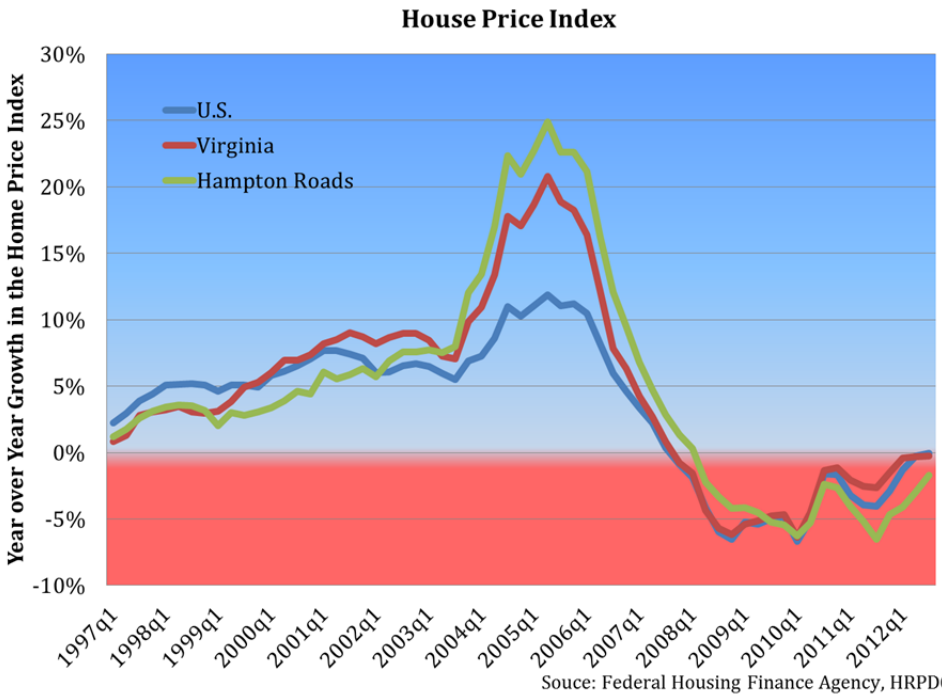
Figure 4.2 Housing Price Indices for Hampton Roads, Virginia, and the United States

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.

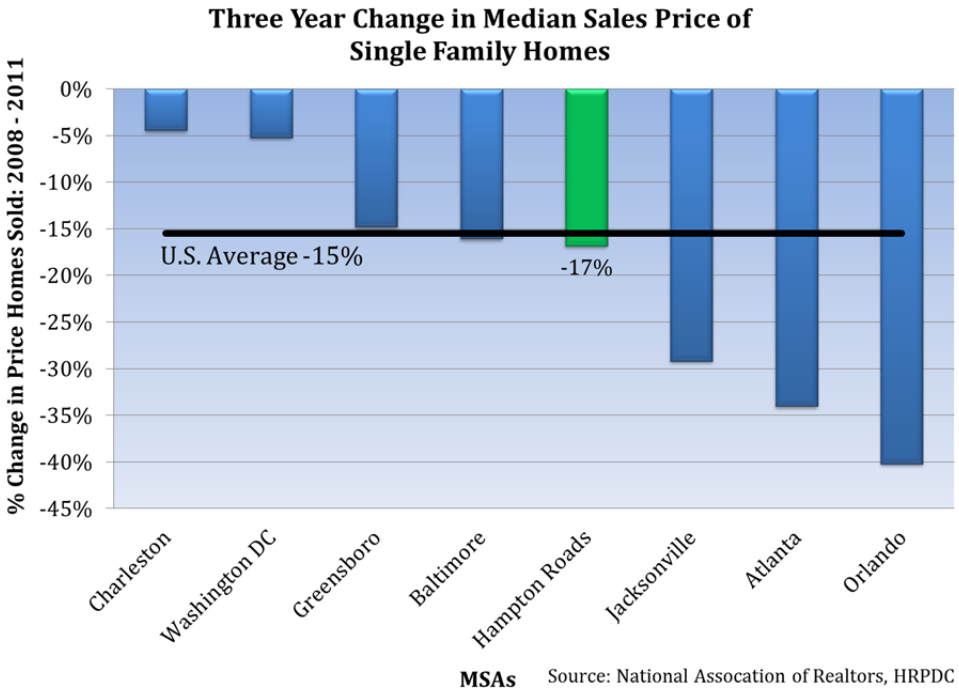
How are we doing?

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 seen since the early nineties.



Souce: Federal Housing Finance Agency, HRPDC

Figure 4.3 Housing Price Increases in Hampton Roads and Competing Metro Areas from 2008 to 2011



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 an 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 continues to experience a decline in the median value of home sales in 2011, but homes have still appreciated in the region 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, but has the negative effect of reducing labor mobility.

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 home ownership returning many to the rental market. Homeownership experienced a modest uptick in 2011.

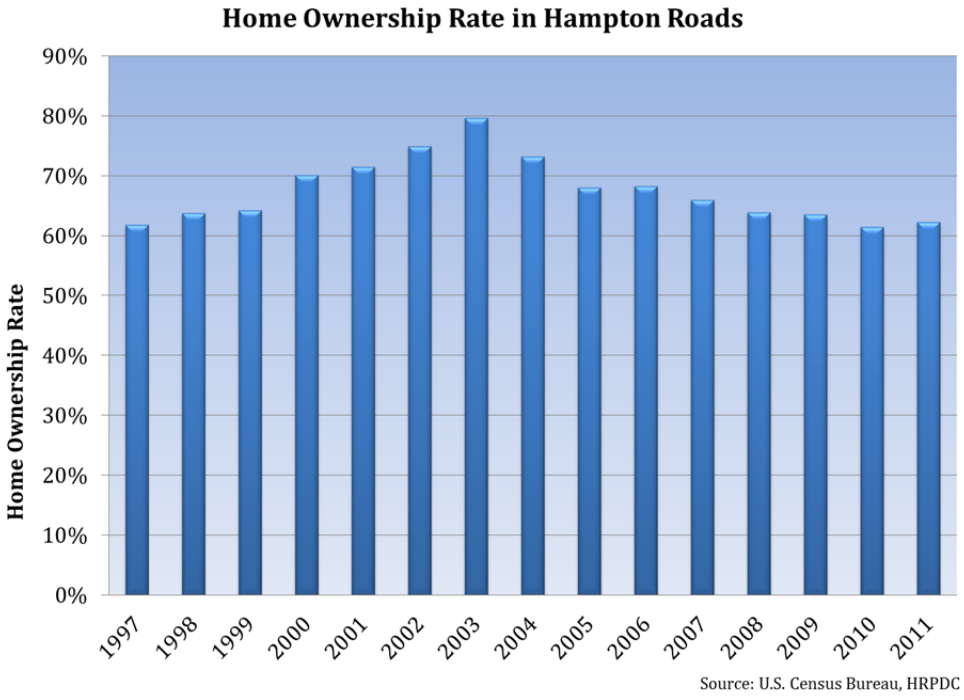
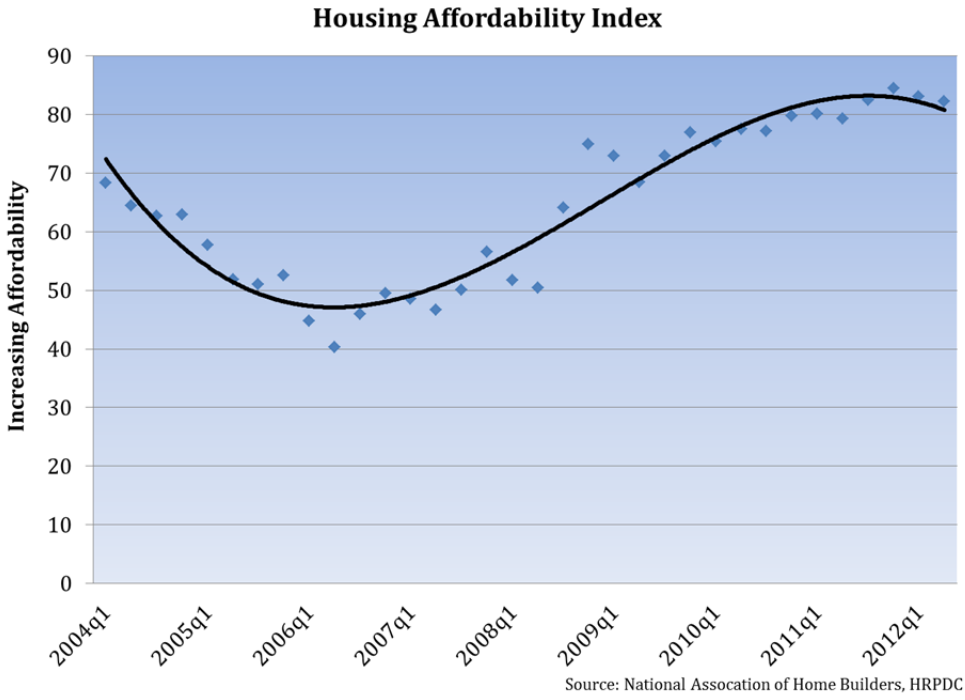


Figure 4.5 Hampton Roads Housing Opportunity Index



Source: National Assocation of Home Builders, HRPDC

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, housing has become more affordable. The record low mortgage rates have also served to make homes more affordable.

Figure 4.6 Housing Affordability in Hampton Roads

Why is it important?

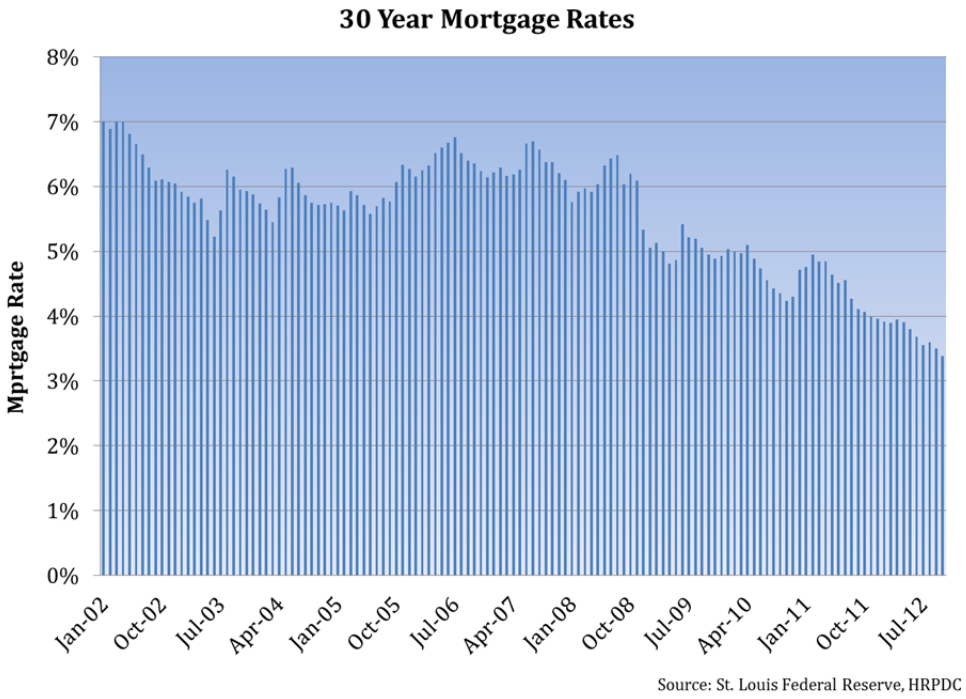
The availability of affordable housing ensures housing opportunities for persons of all income levels. Access to affordable housing prevents homelessness and allows a region to recruit a workforce. The affordability of a 2-bedroom apartment rental is an industry standard in determining affordability.

How are we doing?

As housing values increased in Hampton Roads, affordable housing became scarce, though this was slightly mitigated by the increase in the minimum wage. As families have been forced to leave their homes or have been unable to access credit to purchase a home, the rental market has seen increased demand increasing rents in the region.

Source: National Low Income Housing Coalition, HRPDC

Figure 4.7 Mortgage Rates



Source: St. Louis Federal Reserve, HRPDC

Why is it important?

National mortgage rates greatly influence local mortgage rates, and the overall affordability of the mortgage market. Continued low rates allow the market to continue to improve, but any major increase in mortgage rates could greatly impact the housing market.

How are we doing?

Mortgage Rates are now at the lowest levels in the history of the index.

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SECTION V

Transportation

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

Section V Table of Contents

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 and a decrease in air travel from Hampton Roads airports.

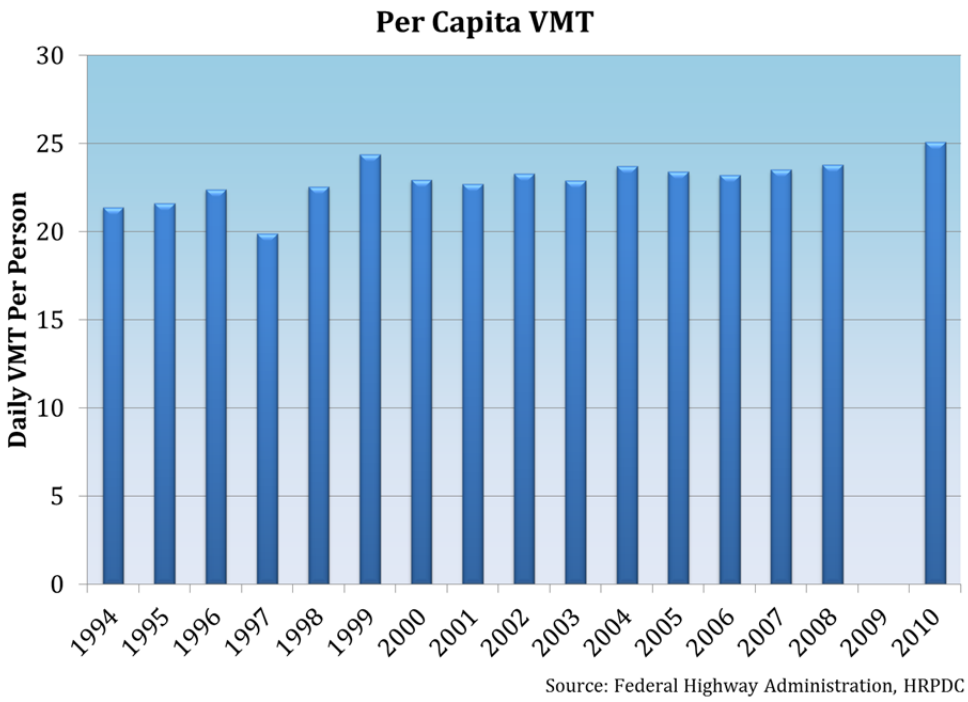
Over the last decade, Hampton Roads has experienced relatively little growth in terms of per capita vehicle miles traveled. In addition, the region also has a lower level of vehicle miles traveled per capita and a lower mean travel time to work than most of the other competitor regions.

In spite of relatively lower amounts of travel per capita in Hampton Roads than in the competitor regions, congestion is a significant issue in the region, particularly at the bridges and tunnels. According to Inrix, among competitor regions only Washington, DC, Baltimore, and Atlanta had a higher Inrix Index(which measures the extra amount of time trips take in each region during congested peak travel periods) than Hampton Roads did in 2011.

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 has completed building the region's first light rail line, running 7.4 miles from Eastern Virginia Medical Center to Newtown Road. Light rail has the capability to impact future land use decisions and encourage increased density in development.

This section of the Regional Benchmarking Study contains 14 graphs on transportation statistics in Hampton Roads.

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 traffic generated per person. Increased sprawl, higher employment to population ratios, and low transit usage can put upward pressure on a region's per capita VMT.

How are we doing?

Unfortunately no data was produced for 2009, but 2010 had a higher per capita VMT then the region had previously seen.

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 transit usage.

How are we doing?

Per capita VMT in Hampton Roads is relatively low when compared to other regions, suggesting that regional commuting distances are comparatively short .

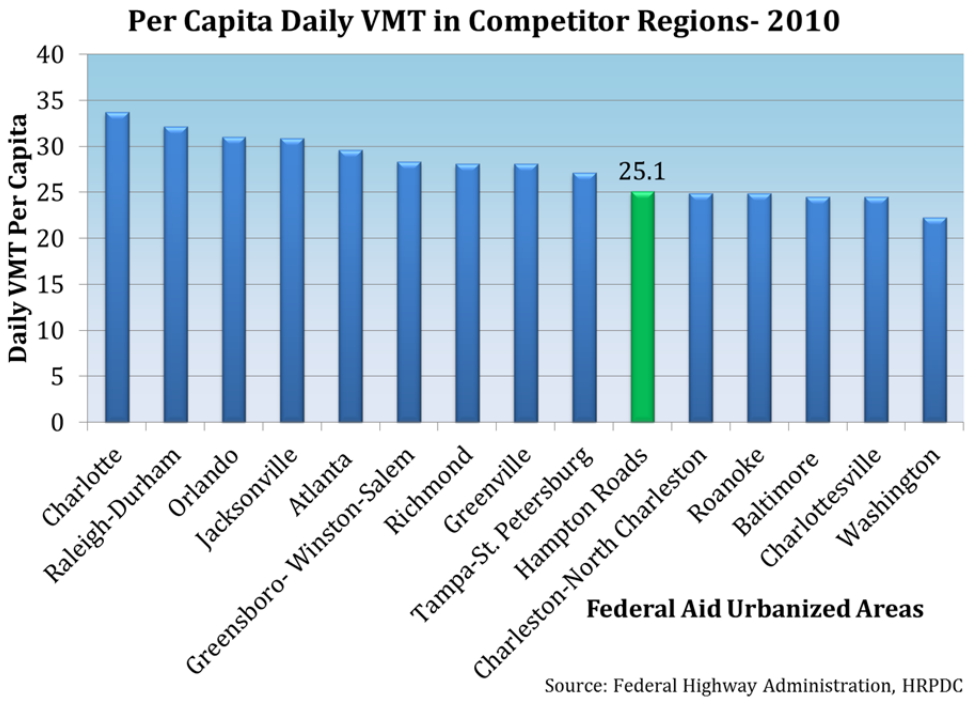
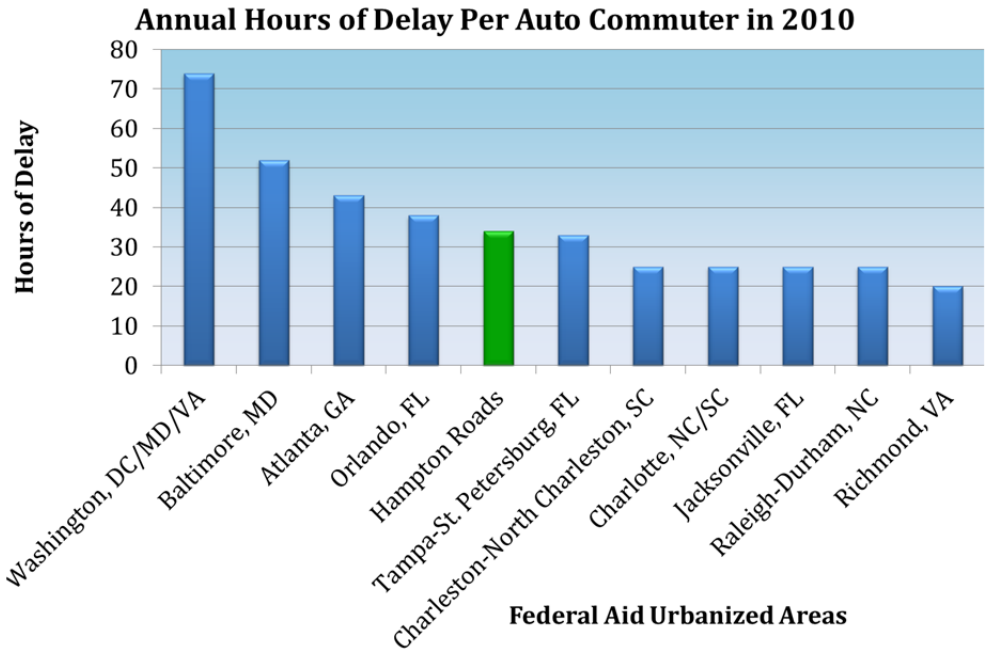


Figure 5.3 Annual Hours of Delay Per Auto Commuter in 2010 in Hampton Roads and Competing MSAs



Source: Texas Transportation Institute, HRPDC

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' hours of delay are in the middle of the region's competitors in the southeast; however, all of the regions that have worse delays have much larger population bases.

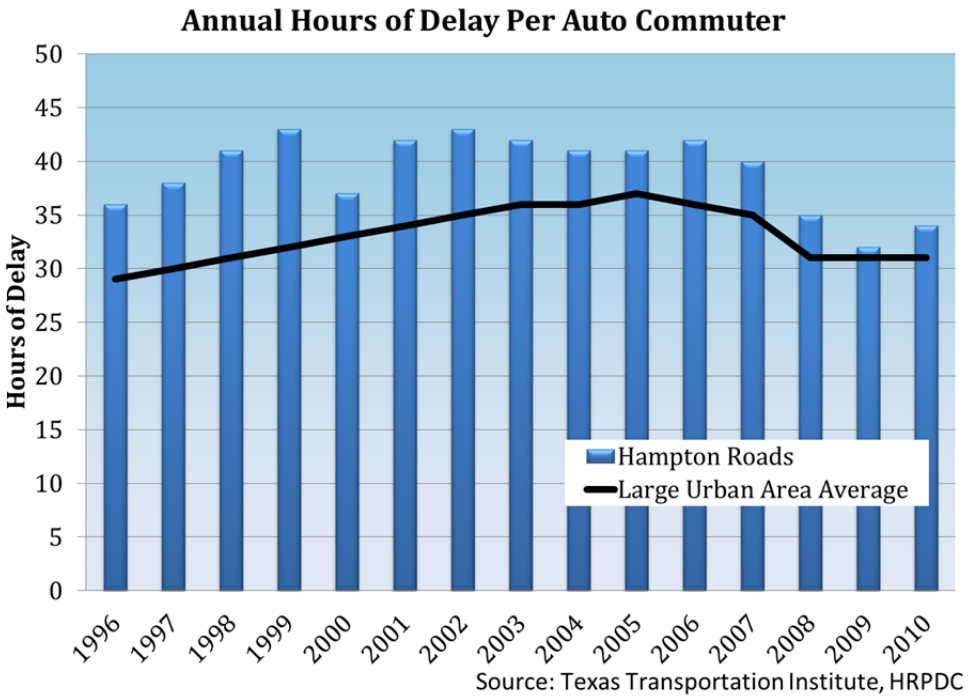
Figure 5.4 Annual Hours of Delay Per Auto Commuter in Hampton Roads

Why is it important?

Congestion trends are very important because of the large impact that congestion has on both the cost of businesses and quality of life. Residents and businesses base their estimation of congestion on prior commuting experiences when planning for the future.

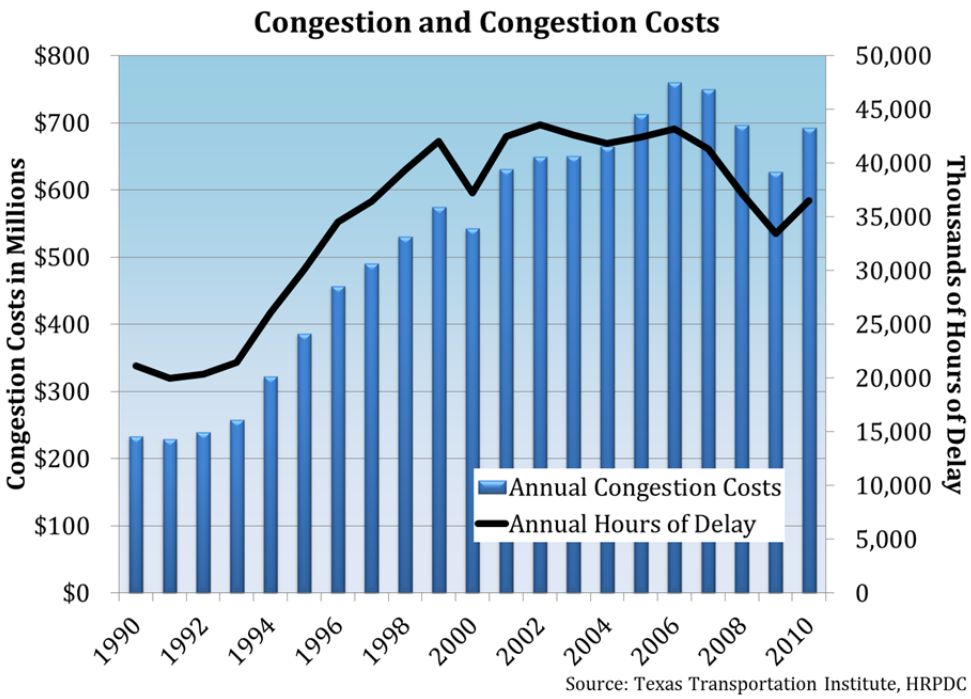
How are we doing?

While congestion continues to be an issue for this region, the hours of delay calculated by the Texas Transportation Institute declined significantly in 2008. This was also the year that TTI began to use actual data rather than estimates of congestion.



Source: Texas Transportation Institute, HRPDC

Figure 5.5 Hampton Roads Congestion and Congestion Costs



Source: Texas Transportation Institute, HRPDC

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 rose substantially through the nineties. In 2010 congestion costs in Hampton Roads reached $693 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.

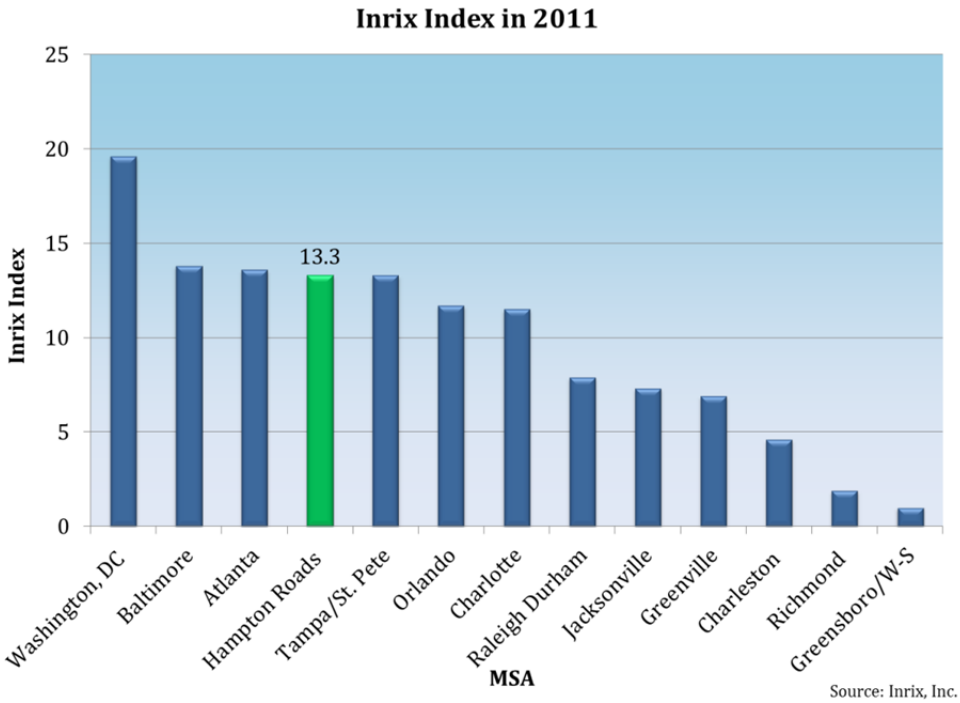
Figure 5.6 Peak Period Travel Time Tax (Measured by the Inrix Index)

Why is it important?

INRIX data combines real-time data from traditional sensors and over 4-million GPS-equipped vehicles to develop a database of traffic speeds and major traffic events. The Inrix Index (formerly the Travel Time Tax) effectively conveys the concept that traffic harms economic activity and vitality in a region.

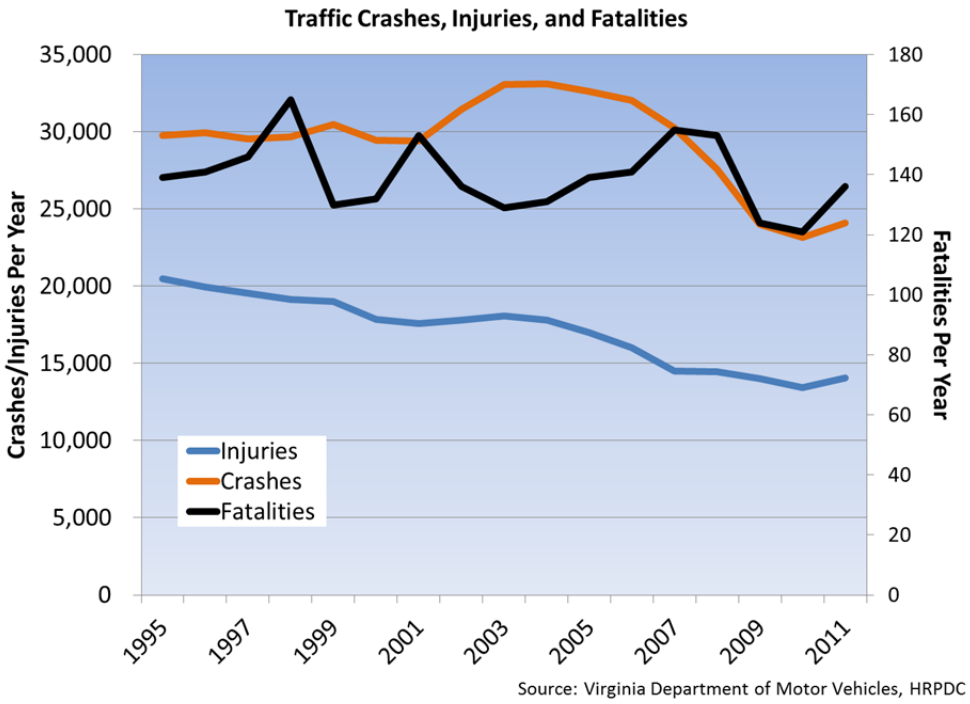
How are we doing?

The data indicates that Hampton Roads has the fourth worst peak period travel time among competitor regions.



Source: Inrix, Inc.

Figure 5.7 Hampton Roads Traffic Crashes



Source: Virginia Department of Motor Vehicles, HRPDC

Why is it important?

Today's society is very dependent on automotive transportation.

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 injuries and crashed can be attributed in part to improved safety standards for both roadways and automobiles, as well as reduced alcohol-related crashes.

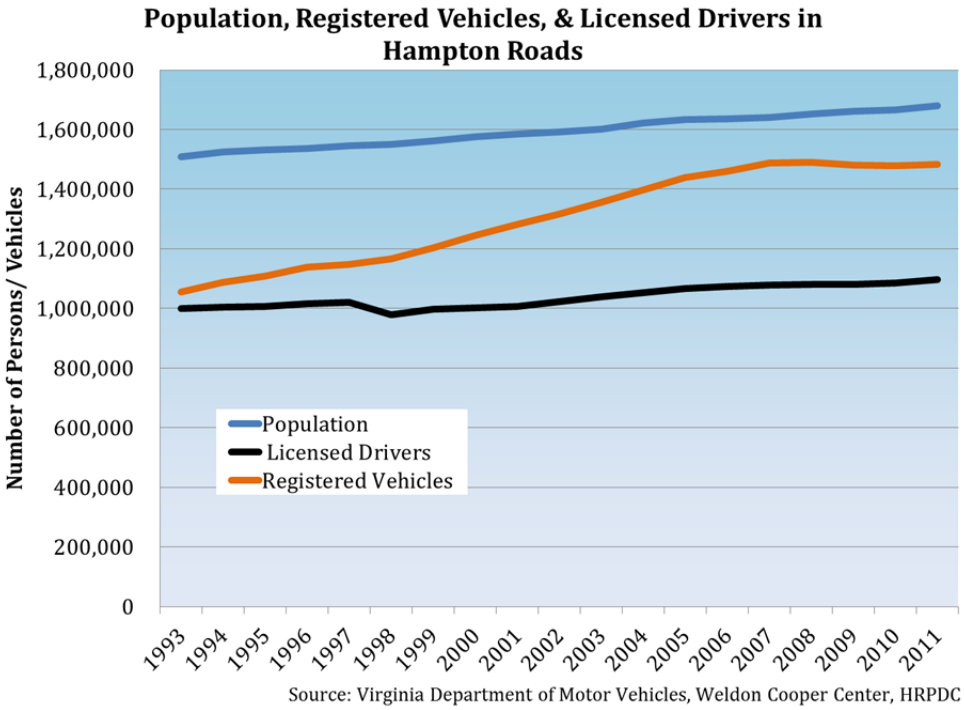
5.8 Hampton Roads Vehicle Registrations

Why is it important?

Population, the number of licensed drivers, and the availability of automobiles are all factors in determining automobile usage.

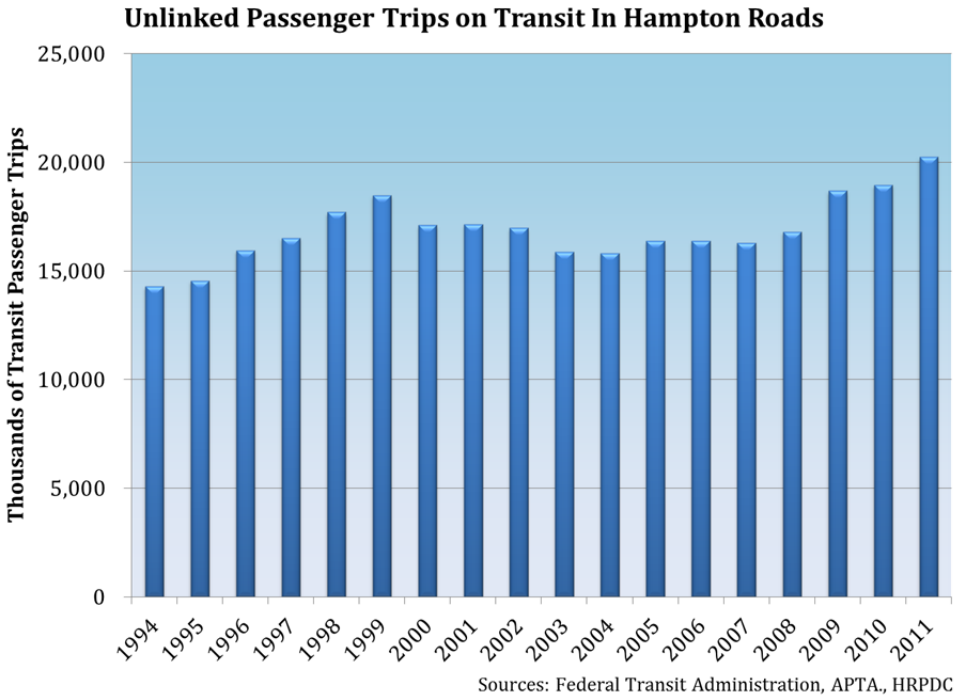
How are we doing?

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, though that growth leveled off since the recession.



Source: Virginia Department of Motor Vehicles, Weldon Cooper Center, HRPDC

Figure 5.9 Transit Passenger Trips 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 can also help to alleviate roadway congestion. Transit ridership is typically a function of availability, necessity and opportunity.

How are we doing?

Passenger trips taken on public transit increased through the latter half of the nineties and again during past four years.

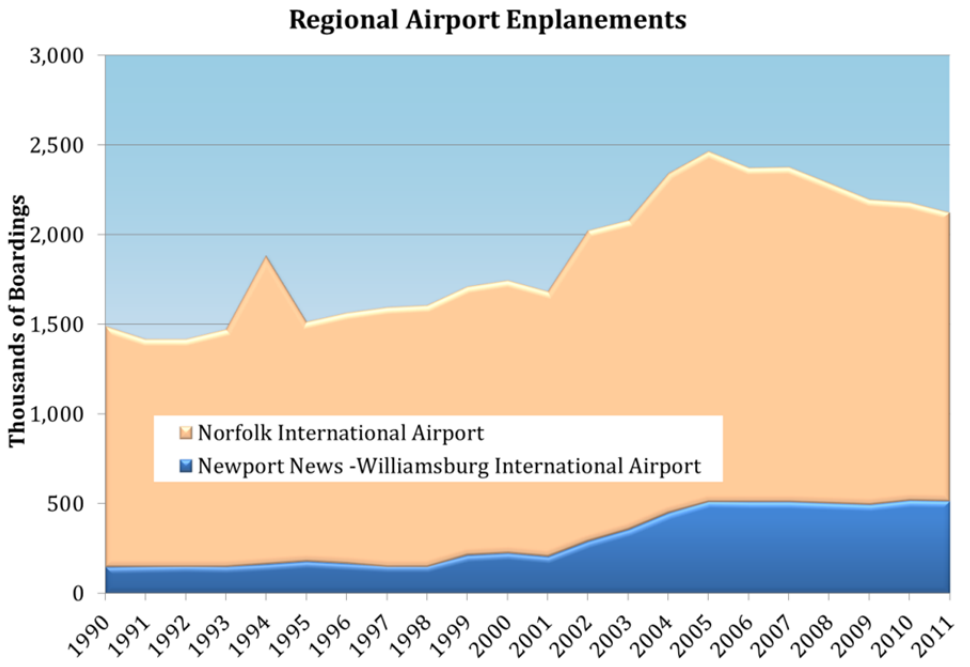
Figure 5.10 Airport Enplanements at Hampton Roads Major Airports

Why is it important?

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

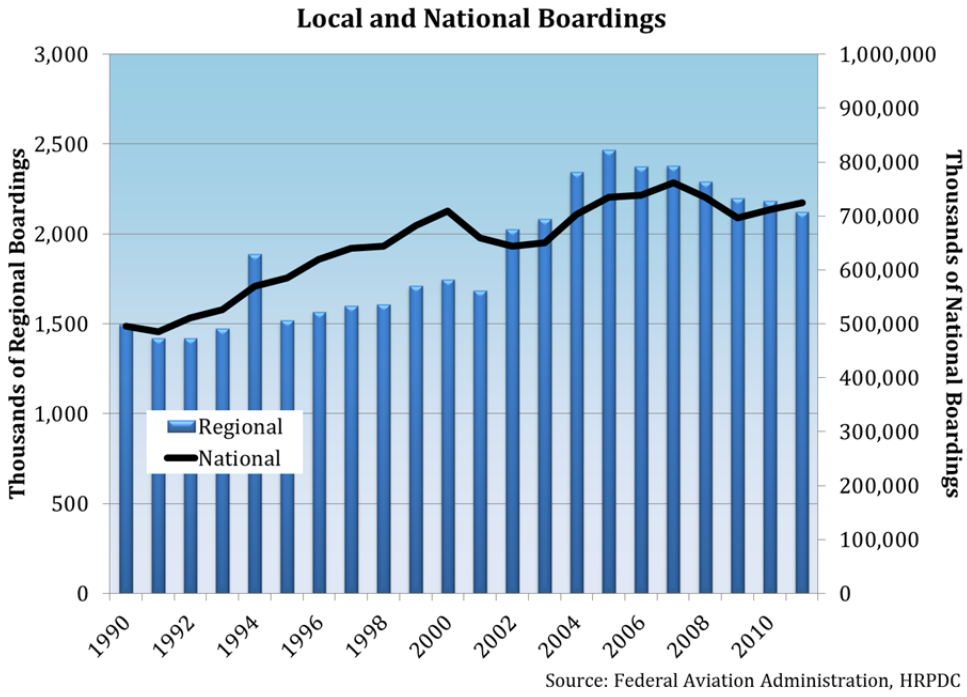
How are we doing?

Value priced airlines have increased competition in the Hampton Roads market, driving down prices and increasing air traffic. 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 recession and ongoing economic weakness.



Source: Federal Aviation Administration,

Figure 5.11 Enplanement Trend in Hampton Roads Compared to the National Enplanement Trend



Source: Federal Aviation Administration, HRPDC

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 of 'low cost carriers' has since bolstered local air travel, and regional boardings had a period of rapid growth before declining with the recession.

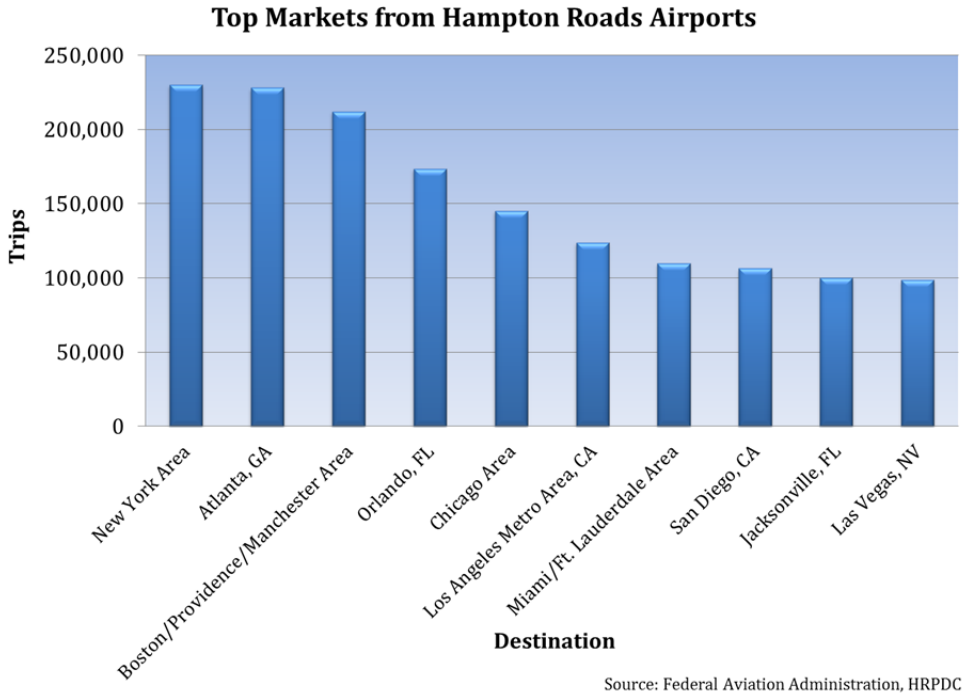
Figure 5.12 Top Markets from Hampton Roads Airports

Why is it important?

This graphic shows the top final destinations and points of orgin for air travel to and from this region, showing where there are commerce connections to Hampton Roads.

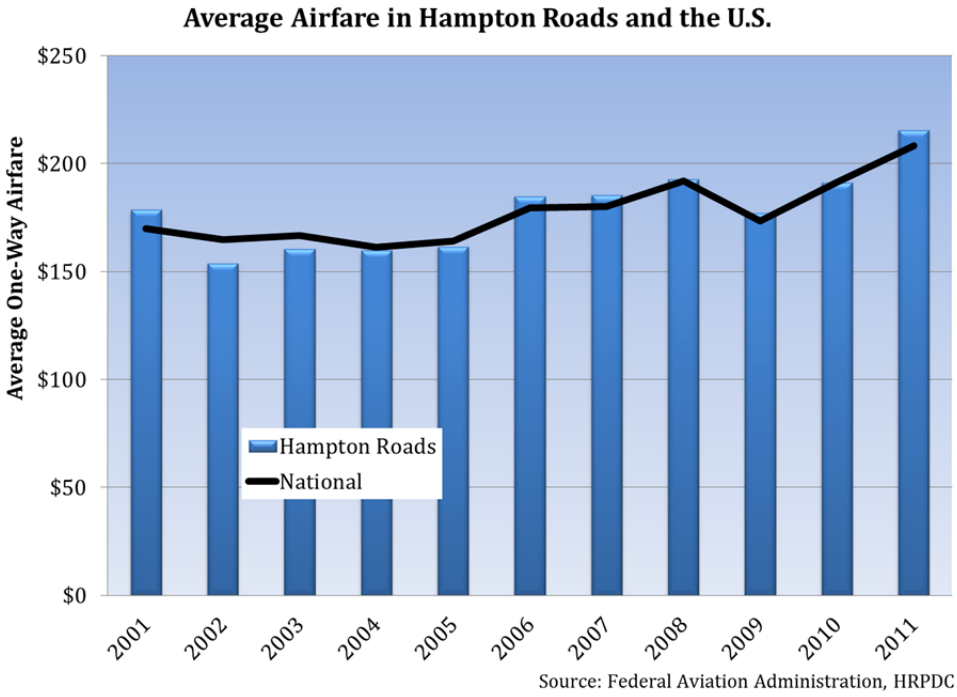
How are we doing?

The destinations that have the greatest number of Hampton Roads trips also have some of the highest populations. Notable exceptions are Orlando, a tourism hub, and Jacksonville which also has a strong military presence.



Source: Federal Aviation Administration, HRPDC

Figure 5.13 Average One-way Airfare in Hampton Roads & the U.S.



Why is it important?

Price is one of the most significant factors determining air travel demand. Several factors determine prices, including airline competition and oil prices.

How are we doing?

Recently Hampton Roads average airfares have tracked the national average airfares, signaling that this market has sufficient competition among airlines. As with all air travel, the price of oil will continue to have major impacts on this region's transportation network.

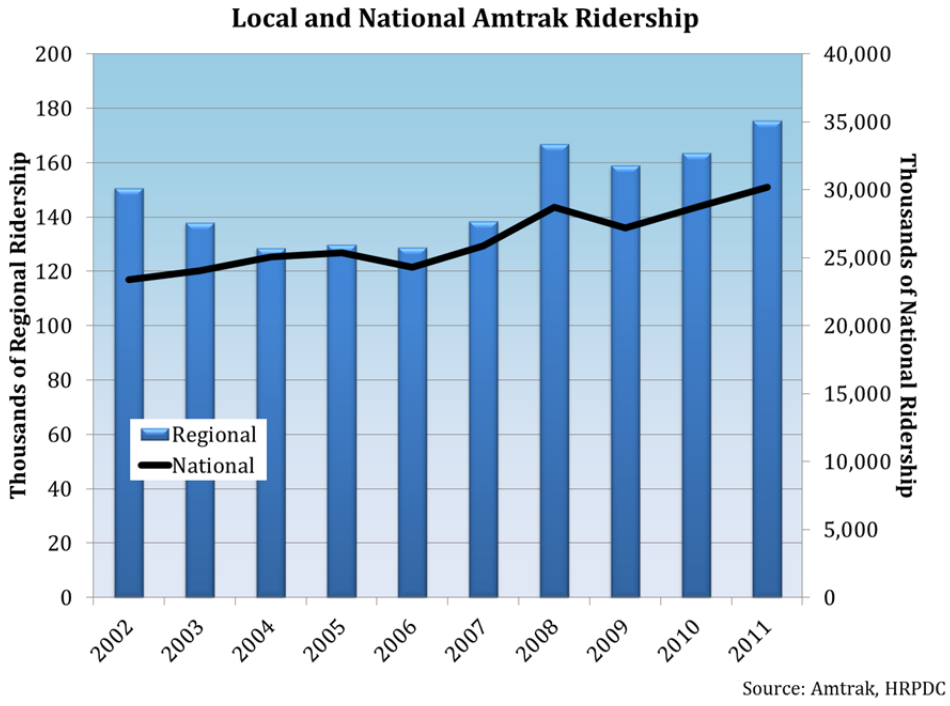
Figure 5.14 Local and National Amtrak Ridership Trend

Why is it important?

As increased attention is placed on transit and environmental issues, train ridership continues to be an area of focus with planners.

How are we doing?

Hampton Roads' passenger train ridership had outpaced the national trend for growth over the past 4 years, and there is room for further growth with the Norfolk service being added into the regional transportation mix.



SECTION VI

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

Section VI Table of Contents

Quality of Life

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

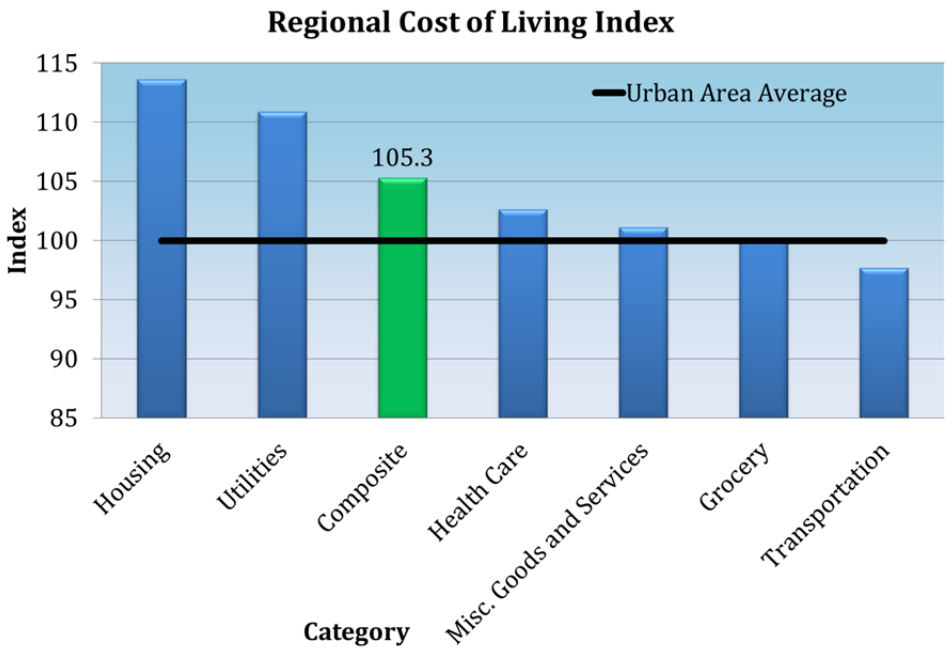
One key issue concerning the Hampton Roads economy is the high cost of living in this metropolitan area as compared to the average urban area. These costs are driven mainly by housing costs that are 13.6% over the urban area average. When one adjusts regional incomes for the high cost of living, the wages begin to fall into the lower end of Southeastern MSAs that compete with Hampton Roads.

Tax collections have begun to decrease in real per capita terms; a reflection of the current economic condition. Property tax collections decreased in the past year, as a result of declining property values. 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. Reduced local government revenues have cut government expenditures.

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 of the Regional Benchmarking Study contains sixteen graphs on quality of life statistics in Hampton Roads.

Figure 6.1 Hampton Roads Cost of Living Index



Source: The Council for Community and Economic Research, HRPDC

Why is it important?

Variations in the cost of living are not constant across the country but can vary by commodity from region to region and city to city.

How are we doing?

According to the most recent ACCRA survey, the cost of living in Hampton Roads is above the urban average, and the region's costs are above the national urban area average in each spending category except transporation. They are particularly high in housing costs.

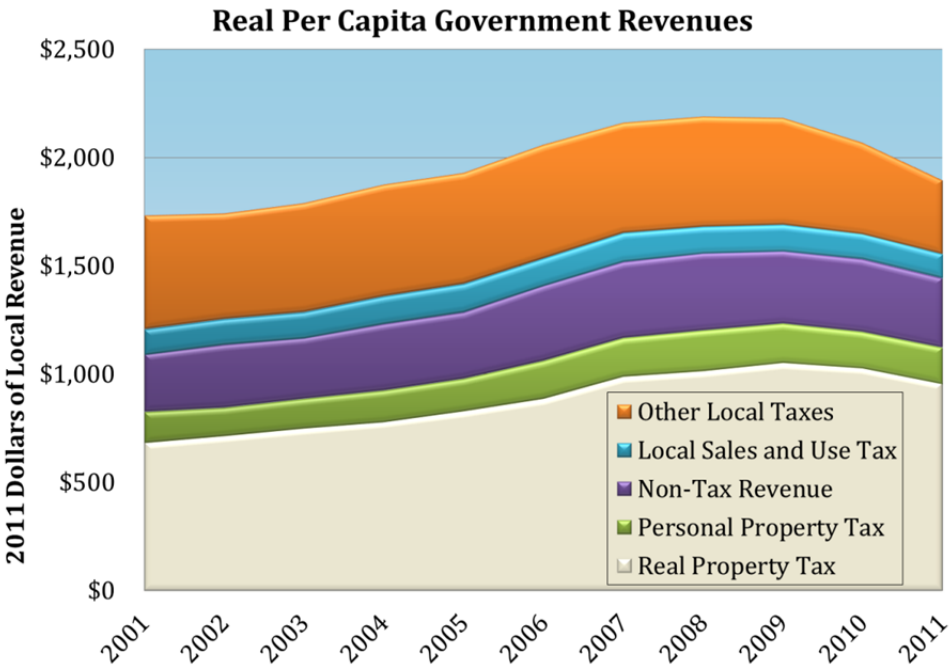
Figure 6.2 Revenue Sources for Local Governments in Hampton Roads

Why is it important?

Local governments generate revenues from a host of different sources. Virginia state law restricts the ability of local governments to tax, requiring localities to concentrate their efforts.

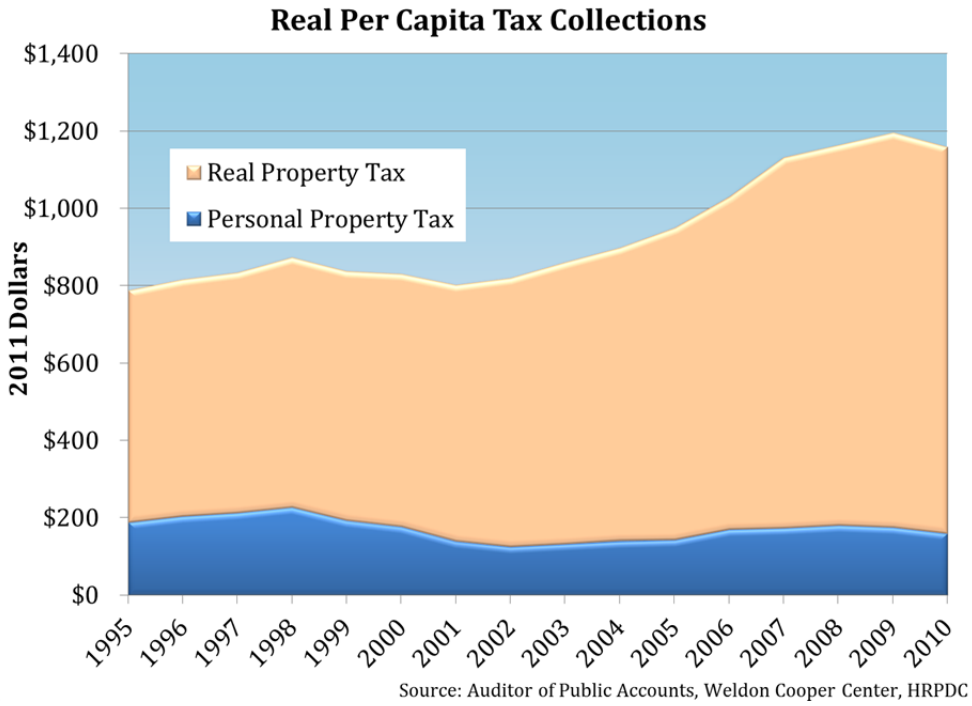
How are we doing?

The majority of Hampton Roads local government revenues are generated from real & personal property taxes. Other taxes, such as the BPOL tax (Business, Professional and Occupational License Tax) and the utility tax, contribute significantly as well. Local government revenues have experienced significant reductions in recent years.



Source: Auditor of Public Accounts, Weldon Cooper Center, HRPDC

Figure 6.3 Property Tax Collections in Hampton Roads



Source: Auditor of Public Accounts, Weldon Cooper Center, HRPDC

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, doubling between 2001 and 2009, but have fallen recemtly. Personal Property taxes have remained relatively flat over that time, although that is largely a result of shifting tax structures (including car tax relief) rather than stagnant personal property values.

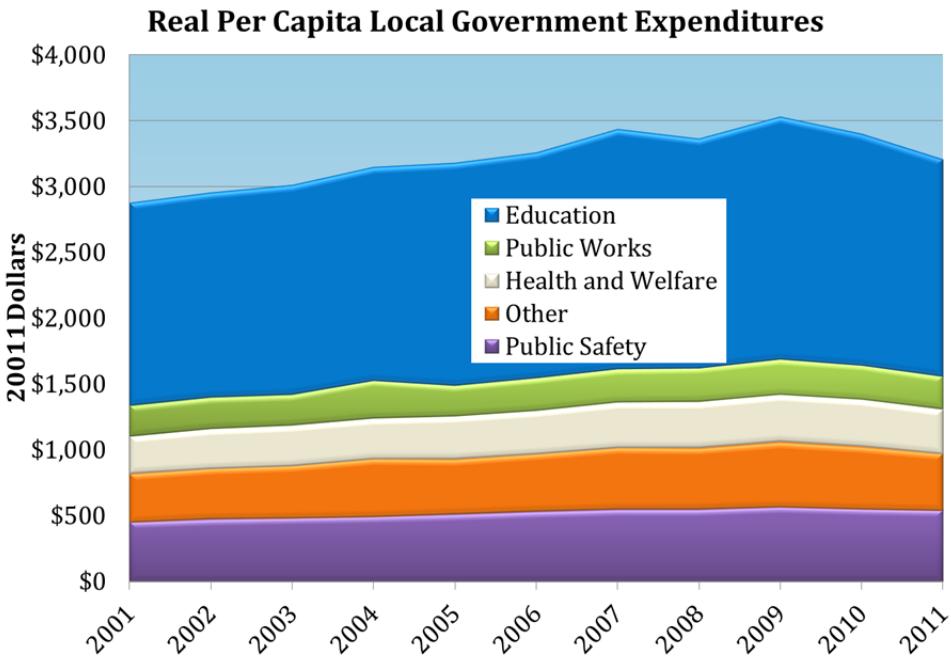
Figure 6.4 Expenditure Categories for Local Governments in Hampton Roads

Why is it important?

Local governments provide a variety of services to their citizenry. The provision of services is based on federal and state mandates and the demands from residents and businesses. Services are constrained by limited government revenues.

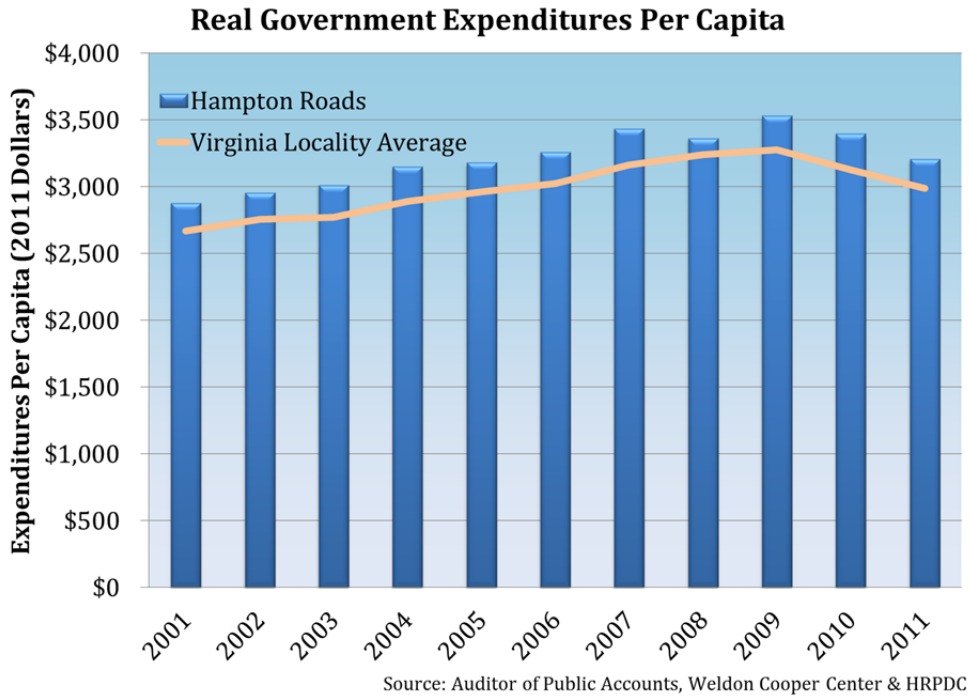
How are we doing?

Over half of all local government expenditures in Hampton Roads are spent on education. Recent decreases in revenues have reduced funding for public works and other projects.



Source: Auditor of Public Accounts, Weldon Cooper Center, HRPDC

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. Localities have absorbed an increasing share of education and other services, though reduced revenues are cutting back expenditures.

Figure 6.6 Distribution of Education Financing for Hampton Roads Jurisdictions in FY2011

Why is it important?

The local, state, and federal governments share the financial burden of funding education. All three governments utilize unique revenue streams to raise the substantial capital required for education.

How are we doing?

The distribution of education funding has shifted in recent years. The state share of education funding has declined while local and federal shares have increased.

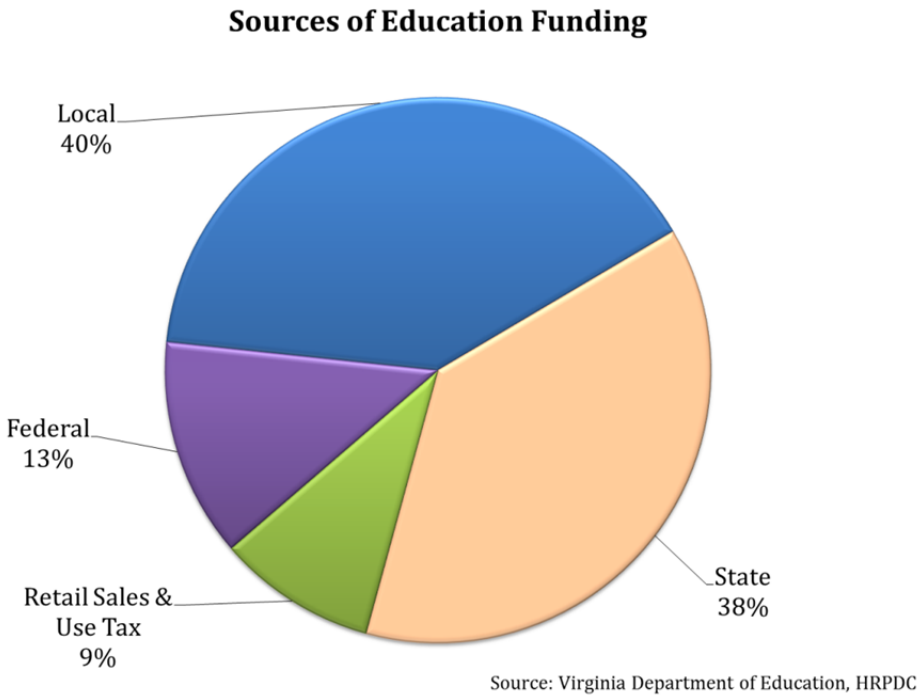
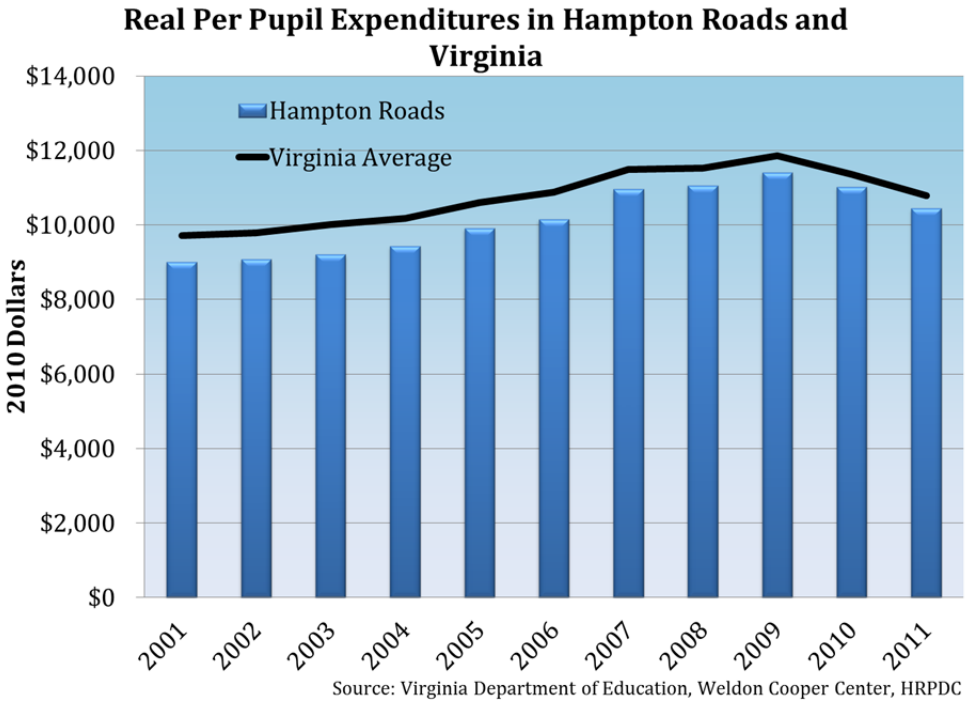


Figure 6.7 Expenditures Per Pupil in Hampton Roads and Virginia



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. Hampton Roads localities and the state have reduced spending on education over the past year which tracks students through the school system.

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 closes with the use of the new longitudinal study that the Virginia Department of Education has adopted.

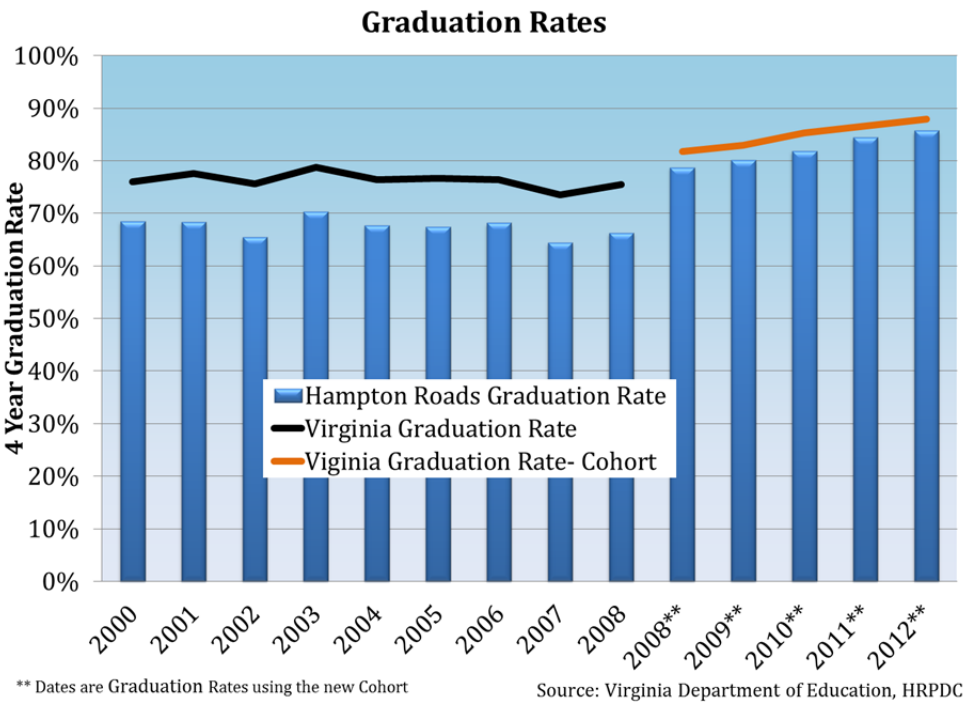
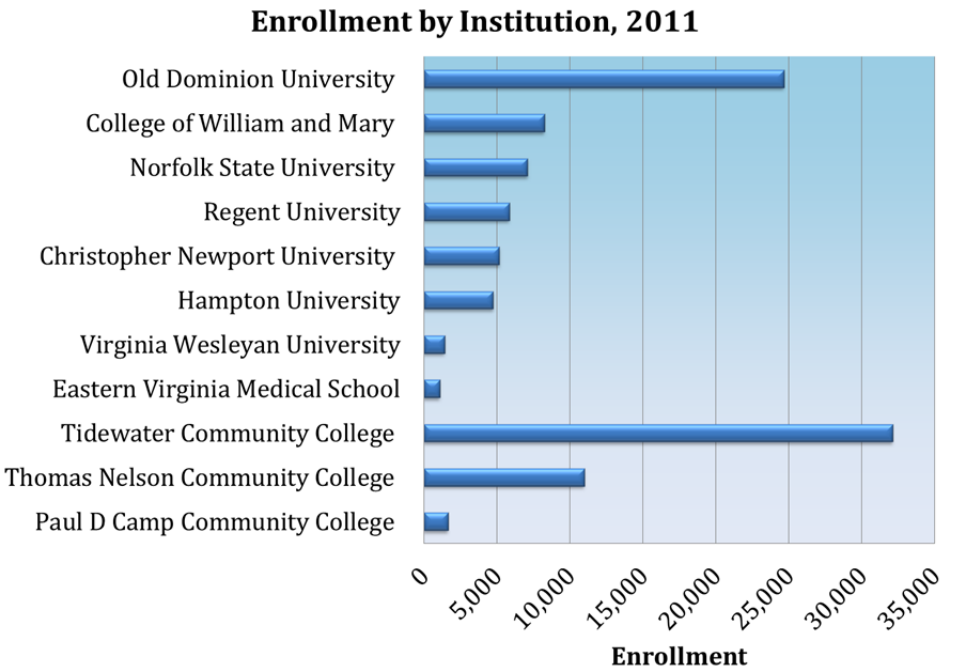


Figure 6.9 Number of Enrolled Students at Regional College & Universities



Source: State Council for Higher Education,

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.

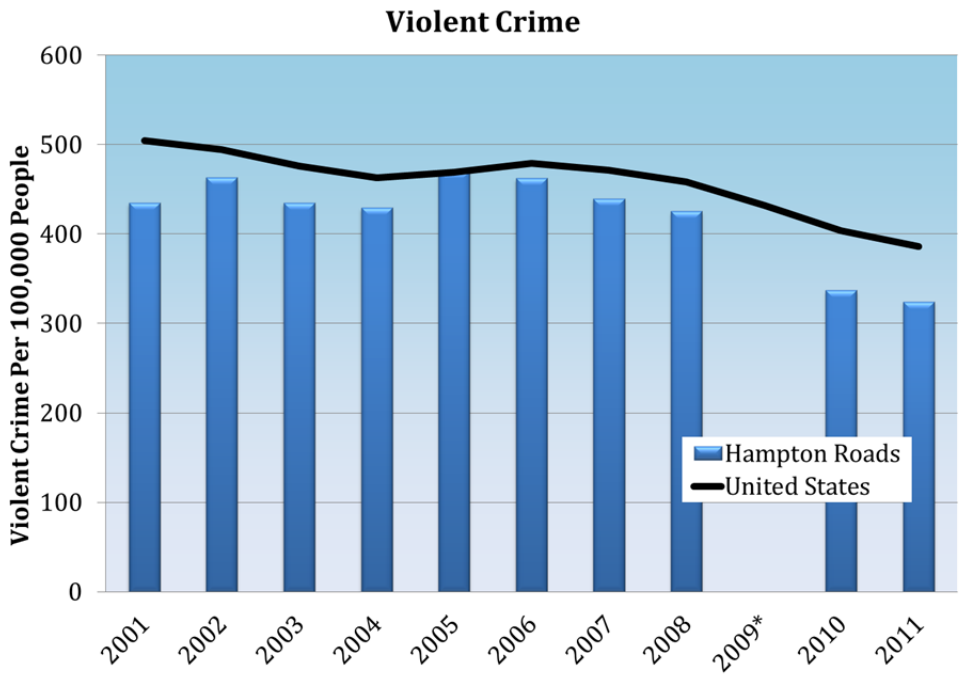
Figure 6.10 Violent Crime in Hampton Roads

Why is it important?

Crime statistics are a reflection of social conditions and quality of life. Crime trends reflect underlying social issues, including inequality and lack of opportunity.

How are we doing?

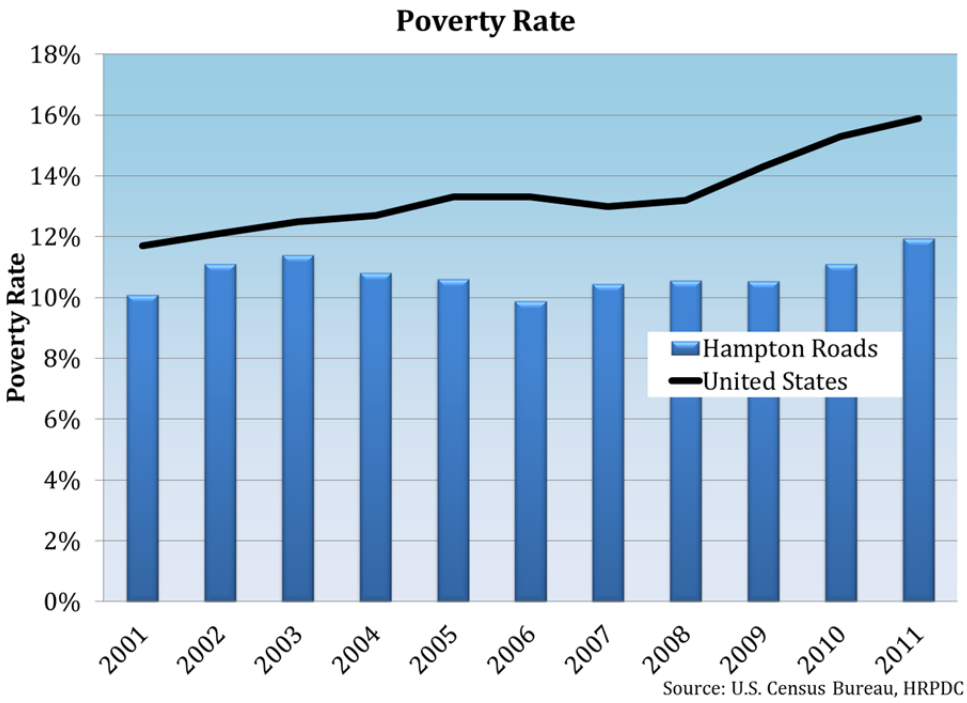
The rate of violent crime in Hampton Roads tends to be below the national average. In 2010 and 2011, Hampton Roads had significantly fewer crimes per 100,000 persons as compared to the nation.



*The FBI did not report data for Hampton Roads in 2009

Source: Federal Bureau of Investigations, HRPDC

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 had stayed flat in Hampton Roads while it rose nationally, but since 2008 the poverty rate in this region has begun to slowly increase.

Figure 6.12 Hampton Roads Air Quality in 2011

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 remaining at the edge of compliance with the primary standard of 75 parts per billion as set by the United States government.

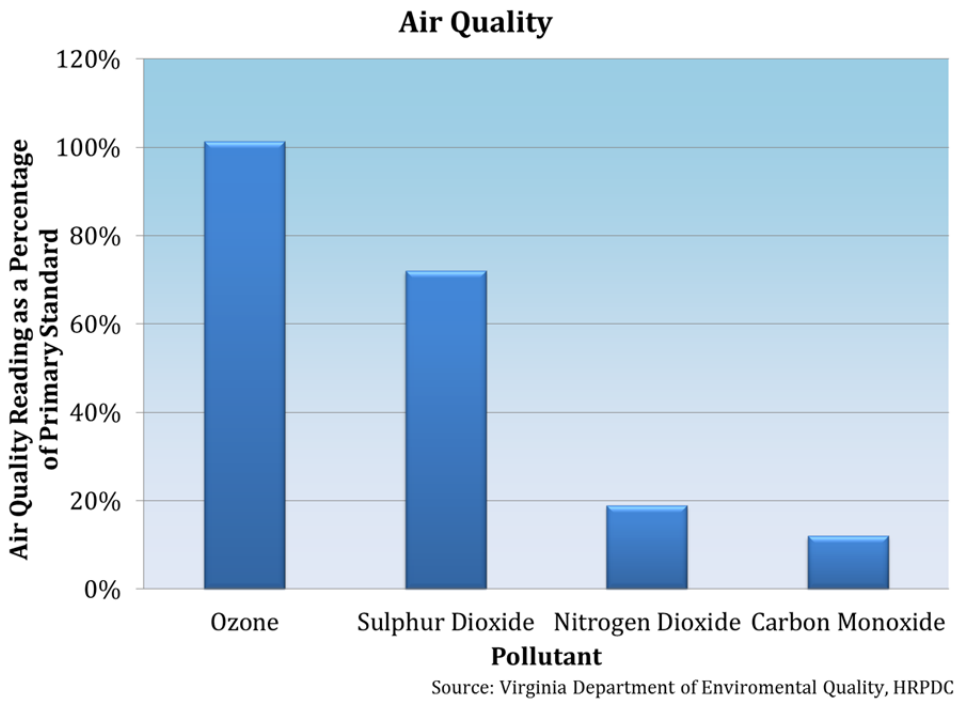
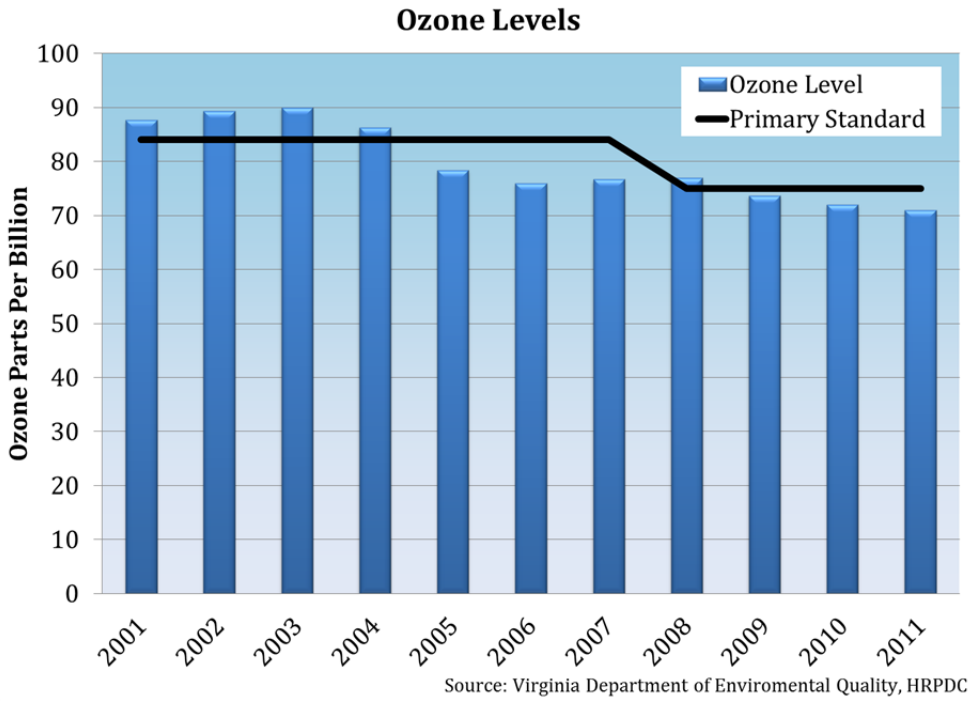


Figure 6.13 Ozone Levels in Hampton Roads Compared to the Primary Standard- 3 Year Moving Average



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 barely out of compliance in 2008 but since that time the region has met the three year moving average standard.

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%. It bounced up again during the recession, but the vacancy rate has begun declining again.

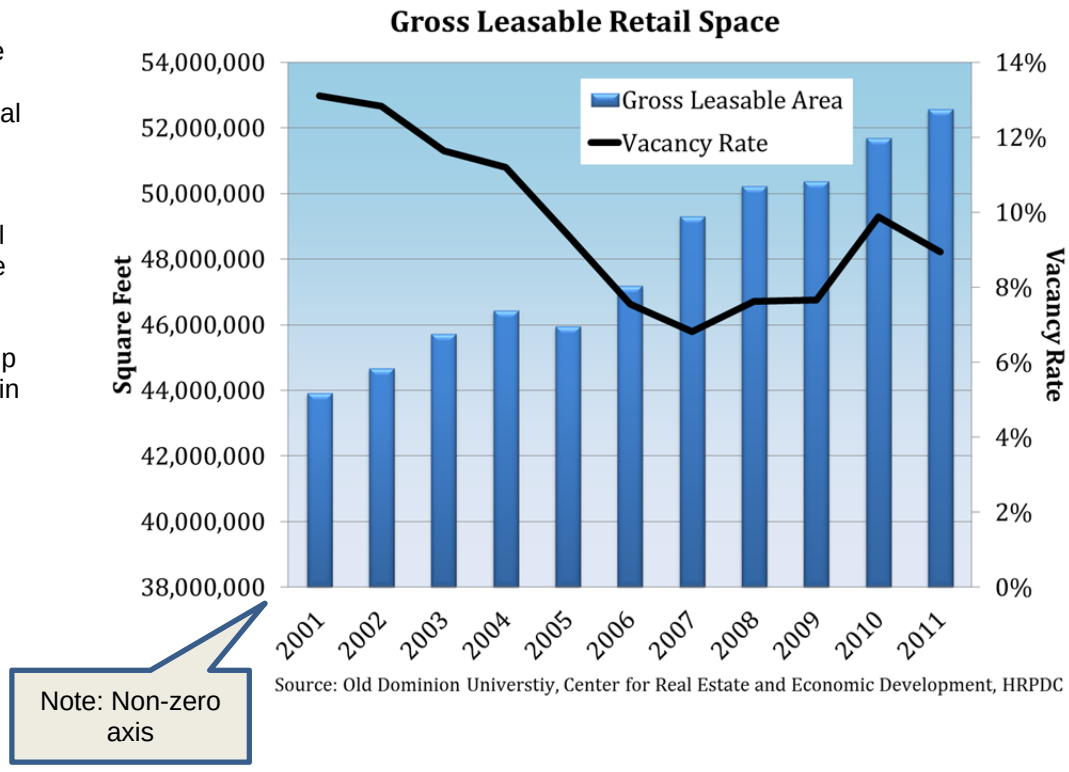
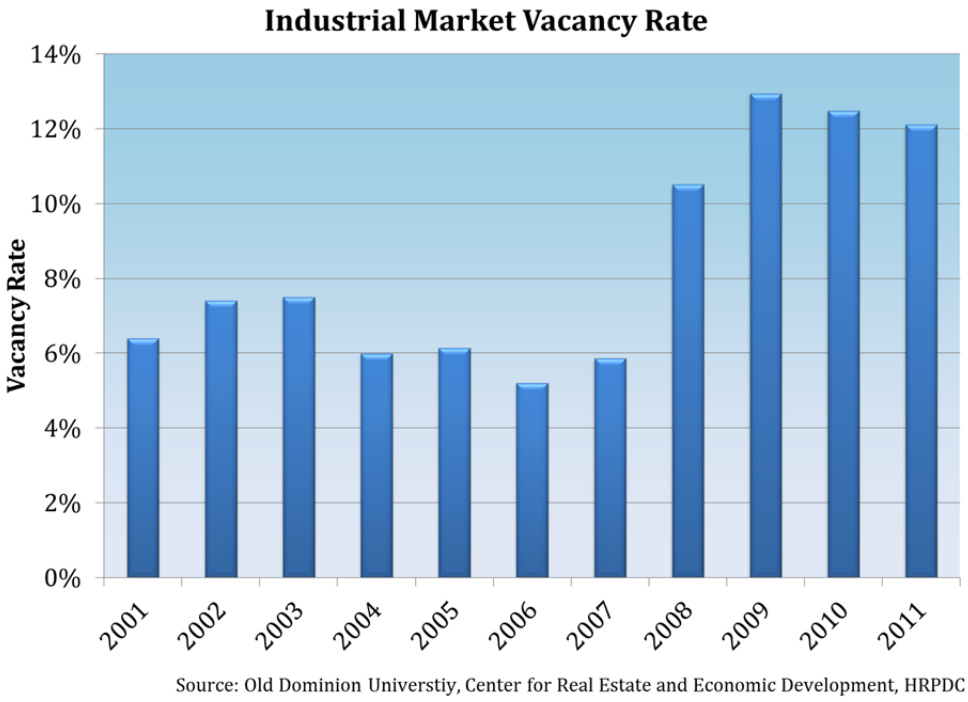


Figure 6.15 Hampton Roads Industrial Market Vacancy Rate



Source: Old Dominion Universtiy, Center for Real Estate and Economic Development, HRPDC

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 between 2007 and 2009, indicating weakness in Hampton Roads industrial sector that only began to ease in 2010 and was down again in 2011.

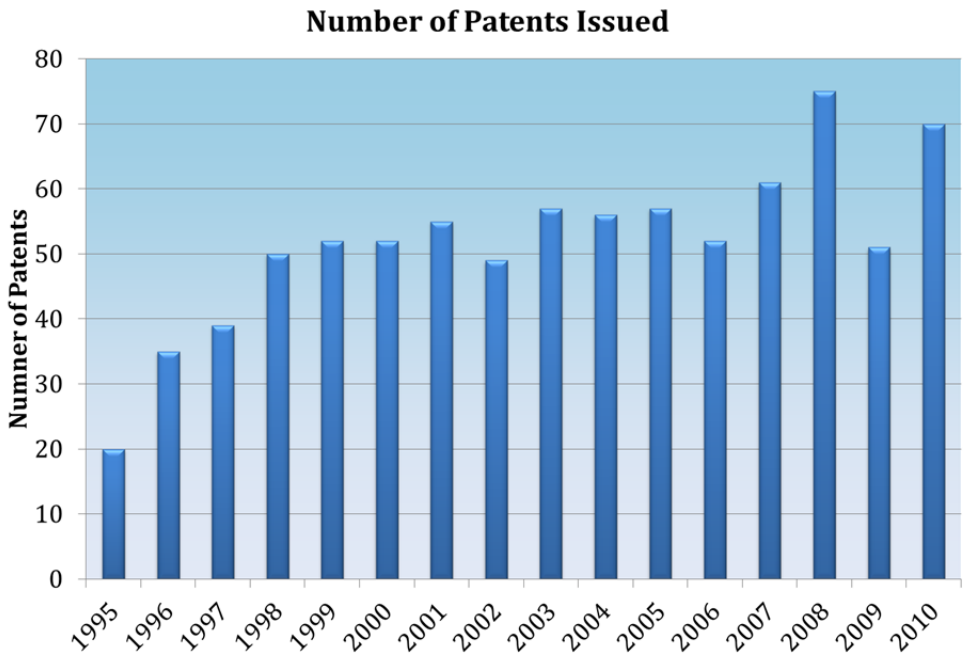
Figure 6.16 Number of Patents Issued in Hampton Roads

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.



Source: U.S. Patent and Trademark Office, HRPDC

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SECTION VI

Local Comparison

This section of the report includes graphic comparisons of the HRPDC localities on several important metrics.

Section VI Table of Contents

Local Comparisons

This section graphically compares the localities of the Hampton Roads Planning District by several important measures.

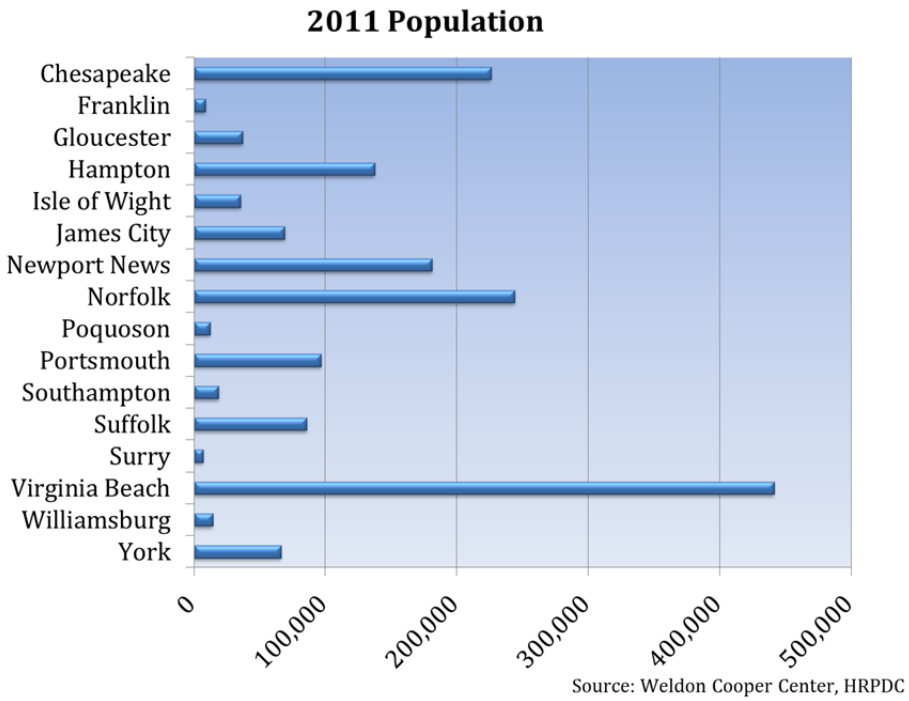
Population, Population Density, and Population Growth help to determine the character of the locality and shape the challenges that localities will encounter as engage in planning.

Per Capita Income, Employment, & Unemployment show a quick economic picture of the localities. Employment and high per capita income provide resources to the locality, while high levels of unemployment demand a greater level (and different types) or services that the locality would otherwise need to provide. Poverty rate another indicator of the needs of the local population.

Lastly, Fair Market Value of Real Estate and Retail Sales provide money to either the state or local governments.

This section of the Regional Benchmarking Study contains 10 graphs comparing the localities of Hampton Roads.

Figure 7.1 Population



Why is it important?
Higher population allows the cost of government services to be spread across more individuals, and can allow for more representation at the General Assembly. High population also demands greater investments.

Figure 7.2 Population Density

Why is it important?
Population density indicates both the room for development within a locality, as well as giving a guide to the type of development that exists currently: urban, suburban, or rural.

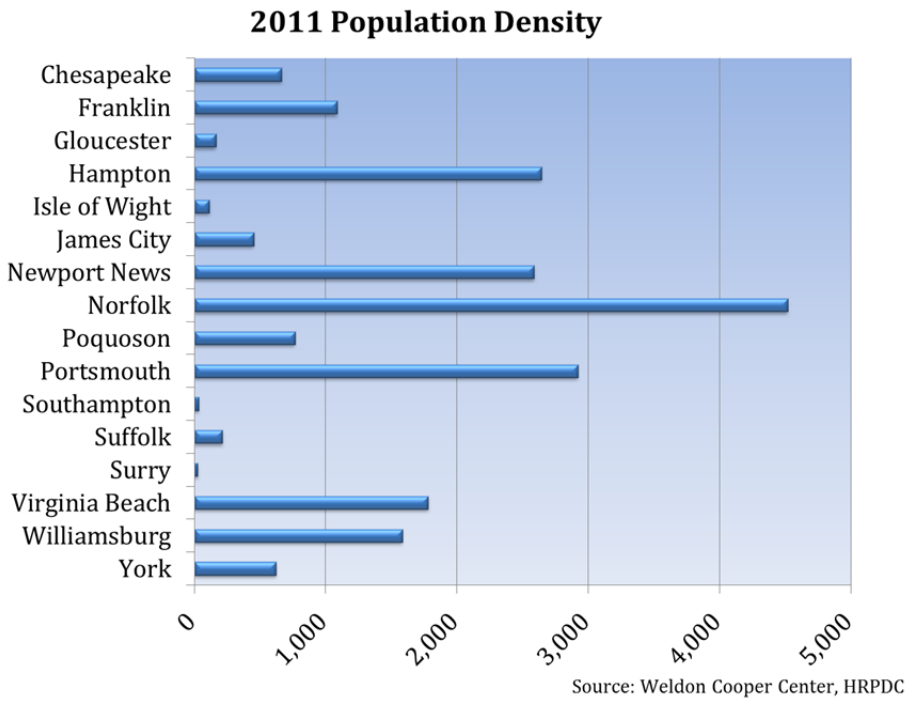
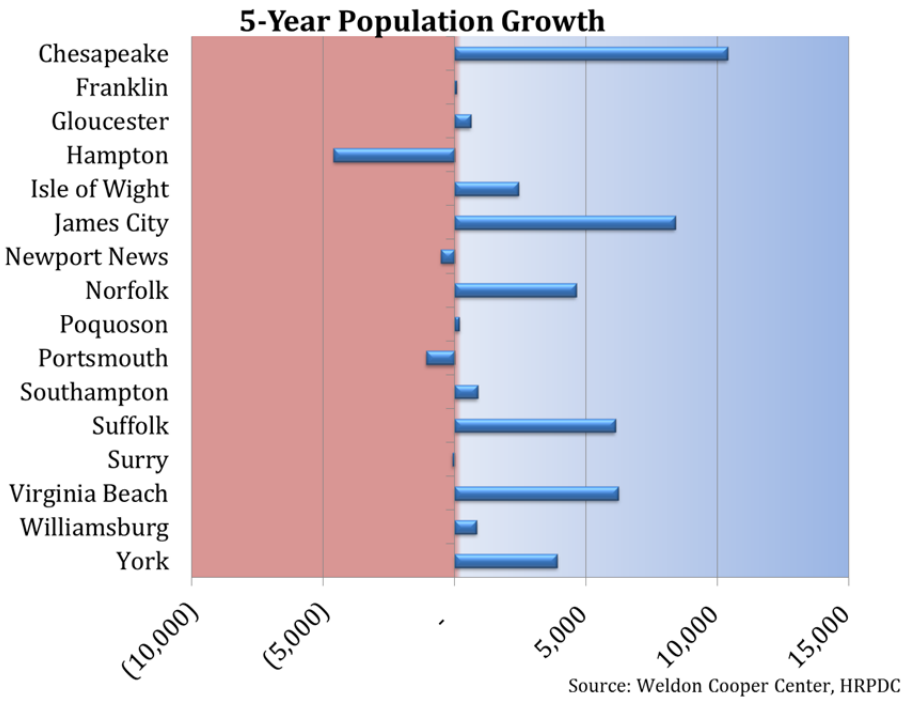


Figure 7.3 5 Year Population Growth



Source: Weldon Cooper Center, HRPDC

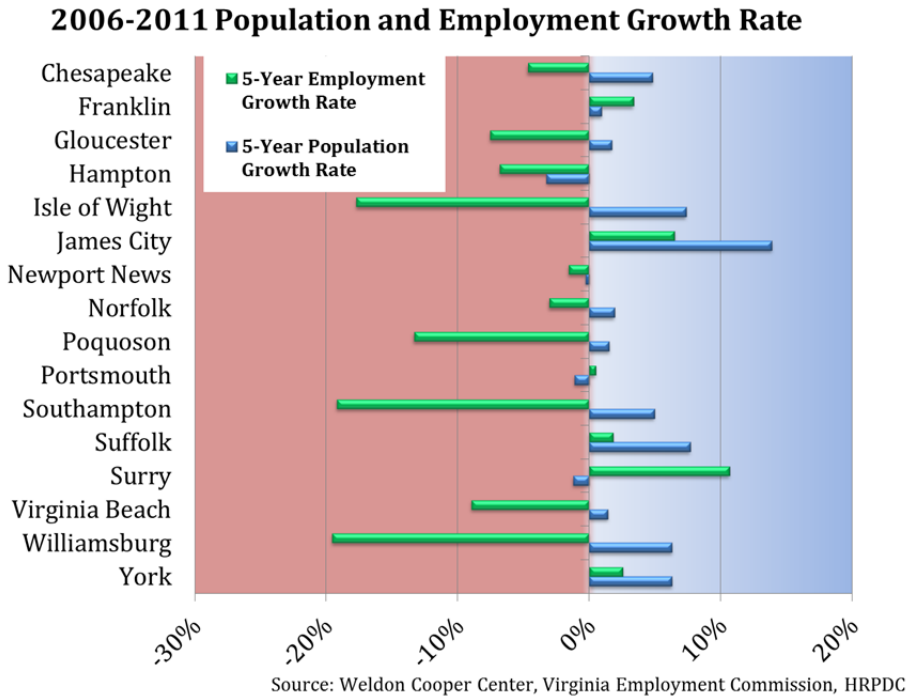
Why is it important?

The raw population growth shows how quickly a locality is growing, which is very important for planning what new infrastructure a region will require.

Figure 7.4 5 Year Population and Employment Growth Rates

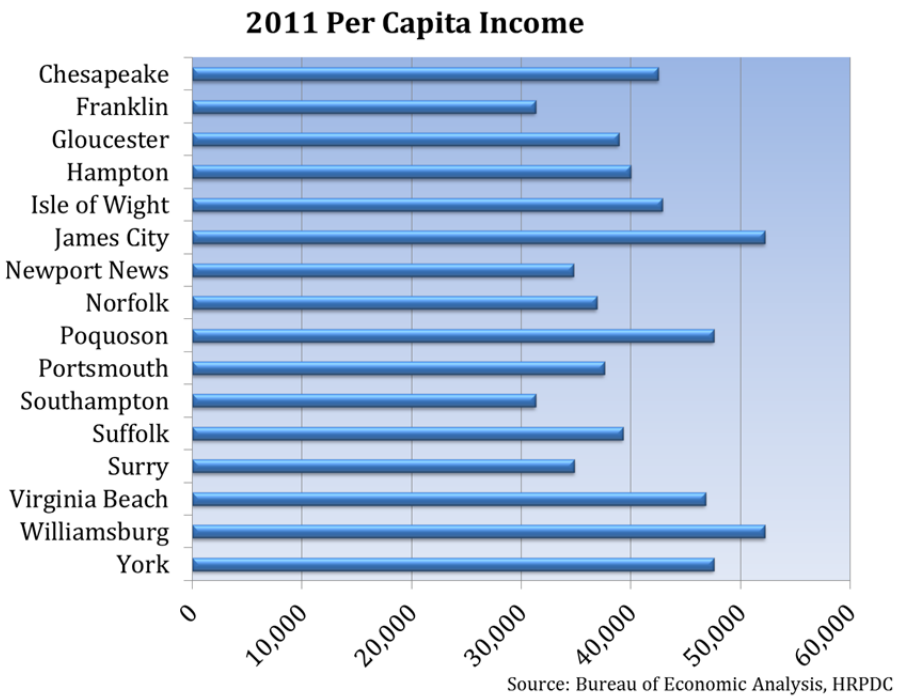
Why is it important?

Population growth and employment growth are usually linked within the region and localities. Raw growth is important for calculating immediate infrastructure requirements. Growth rate is important for long term projections on the changing nature of a locality.



Source: Weldon Cooper Center, Virginia Employment Commission, HRPDC

Figure 7.5 Per Capita Income



Source: Bureau of Economic Analysis, HRPDC

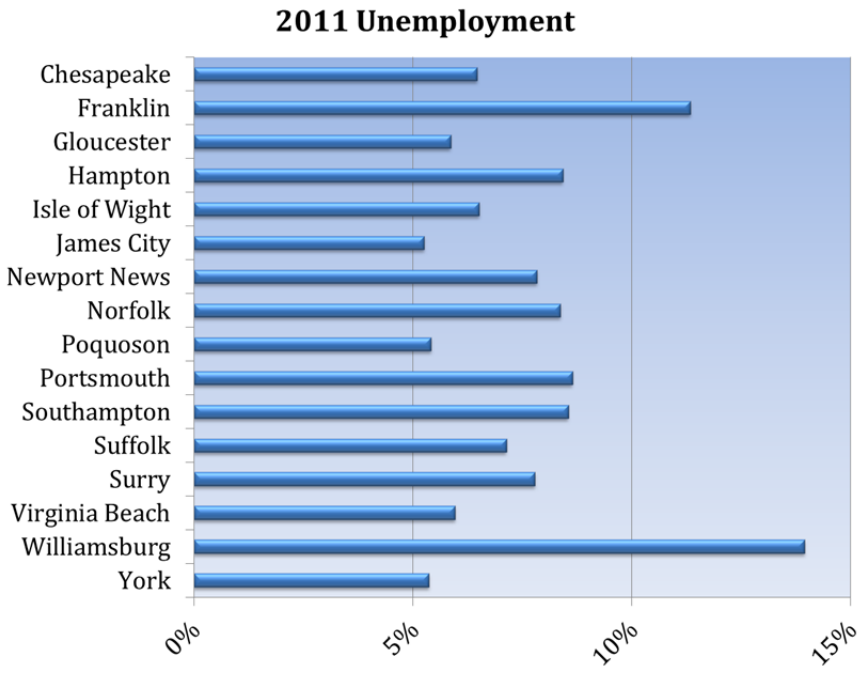
Why is it important?

Per Capita Income is a basic measure of well being within a locality. Higher levels of income indicate both a lower demand on many of the services a locality provides, but also revenue potential to pay for those resource. As a simple average, a locality could have a higher per capita income while still having a significant number of low income families.

Figure 7.6 Unemployment

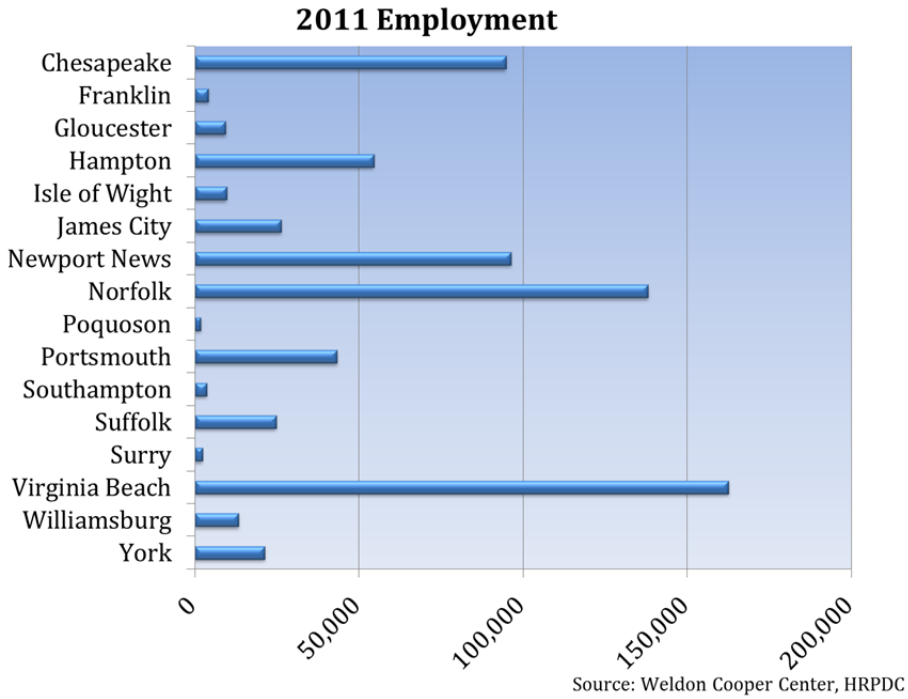
Why is it important?

Indicates the number of individuals in a locality who are looking for jobs but unable to find them. This serves as an indicator of the stress a local population experiences.



Source: Weldon Cooper Center, HRPDC

Figure 7.7 Employment



Why is it important?
Employment measures the number of jobs that are located within a locality, rather than the number of people within the locality who have jobs.

Figure 7.8 Poverty Rate

Why is it important?
The poverty rate measures the number of individuals in poverty per 1,000 people in a community. People in poverty as defined by the Census do not earn sufficient income to have an acceptable quality of life. Measures of poverty do not account for any government transfers disadvantaged individuals may receive.

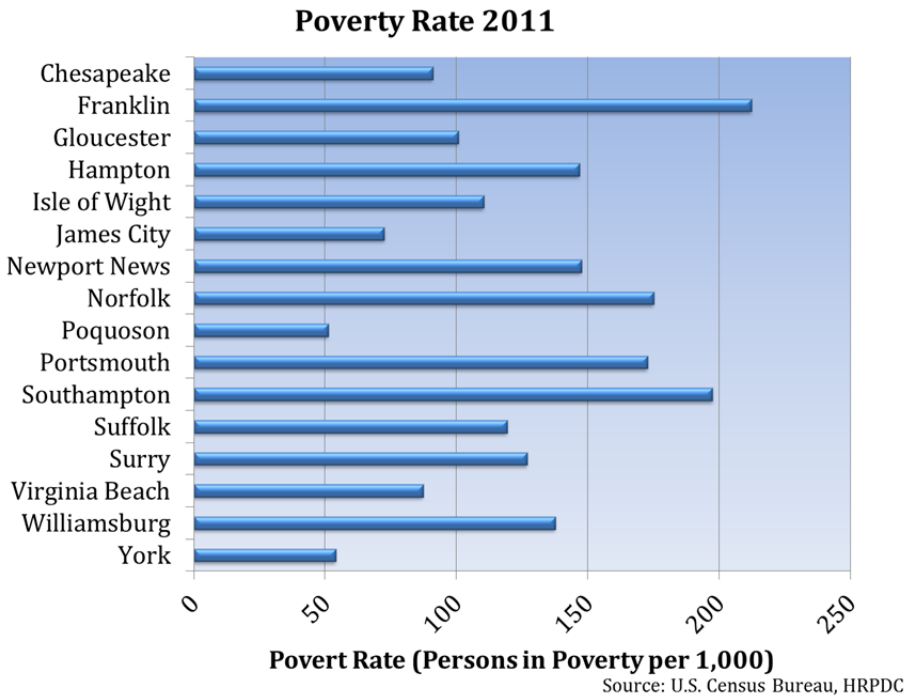
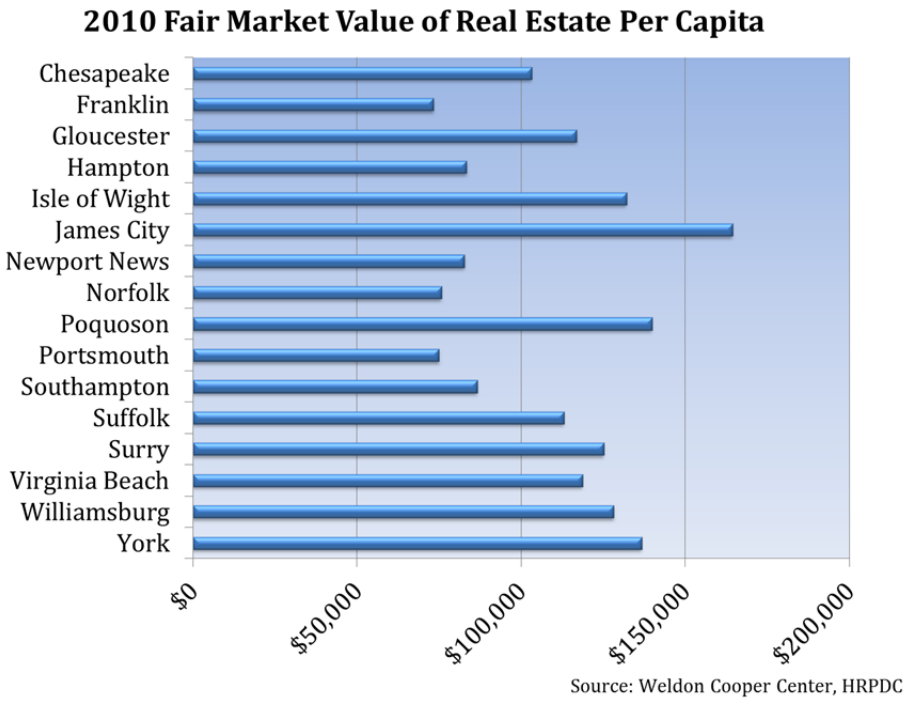


Figure 7.9 Fair Market Value of Real Estate



Why is it important?

Indicates the value of land within a locality. Real property is one of the most important ways that localities raise revenue, and thus fair market value of real estate indicates the resources available for investment within a locality.

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Figure 7.10 Retail Sales

Why is it important?

Retail sales indicate the level of economic activity occurring within a locality. While the importance of this has declined over time with the rise of the internet, more than 94% of all sales occur at brick and motor locations.

Data Tables

Figure 1.1: Gross Metro Product in 2011	
MSA	**Billions**
Washington D.C.	$433.9
Atlanta	$283.8
Baltimore	$148.0
Charlotte	$117.8
Tampa	$115.2
Orlando	$105.0
Hampton Roads	$80.4
Richmond	$65.2
Jacksonville	$60.9
Raleigh	$59.8
Greensboro	$35.9
Charleston	$28.5
Greenville	$26.6

Source: U.S. Conference of Mayors

Figure 1.2: Gross Metro Product in 2011	
MSA	**Billions**
Iraq	$115.4
Bangladesh	$110.6
Angola	$101.0
Morocco	$100.2
Slovak Republic	$96.0
Hampton Roads	$80.4
Oman	$71.8
Ecuador	$67.0
Croatia	$63.9
Azerbaijan	$63.4
Luxembourg	$59.5

Source: World Bank

Figure 1.3: National and Regional Gross Product Growth					
Year	U.S.	H.R.	Year	U.S.	H.R.
1970	-1%	-5%	1991	0%	0%
1971	3%	1%	1992	3%	2%
1972	5%	4%	1993	1%	2%
1973	6%	6%	1994	4%	2%
1974	-1%	2%	1995	2%	1%
1975	0%	-1%	1996	3%	1%
1976	6%	3%	1997	4%	0%
1977	5%	5%	1998	4%	0%
1978	6%	6%	1999	4%	3%
1979	3%	3%	2000	4%	2%
1980	0%	2%	2001	1%	2%
1981	2%	4%	2002	2%	2%
1982	-2%	1%	2003	2%	3%
1983	4%	6%	2004	3%	4%
1984	7%	7%	2005	3%	1%
1985	4%	5%	2006	3%	3%
1986	3%	5%	2007	2%	1%
1987	3%	5%	2008	0%	-2%
1988	4%	3%	2009	-4%	-3%
1989	4%	3%	2010	3%	2%
1990	2%	2%	2011	2%	0%

Source: Regional Economic Modeling Inc., HRPDC

Figure 1.4: Growth in Gross Regional Product For Select Metropolitan Areas From 2008 To	
Statistical Area	**Annualized Growth Rate**
Raleigh	4%
Washington D.C.	3%
Baltimore	3%
Greensboro	2%
Charleston	2%
Richmond	2%
Greenville	2%
Charlotte	2%
Atlanta	1%
Hampton Roads	1%
Jacksonville	1%
Tampa	1%
Orlando	0%

Source: U.S. Confrence of Mayors, HRPDC

Figure 1.5: Per Capita Gross Metro Product	
Statistical Area	**Per Capita Income**
Washington D.C.	$76,070
Charlotte	$65,609
Baltimore	$54,230
Atlanta	$52,956
Raleigh	$51,396
Greensboro	$49,113
Orlando	$48,357
Jacksonville	$47,976
Richmond	$47,932
Hampton Roads	$47,860
Charleston	$41,781
Greenville	$41,087
Tampa	$40,783

Source: U.S. Confrence of Mayors, U.S. Census Bureau, HRPDC

Figure 1.6: National and Regional Per Capita Gross Product Growth		
Year	U.S.	H.R.
1991	-2%	-1%
1992	2%	0%
1993	2%	2%
1994	3%	3%
1995	1%	1%
1996	3%	1%
1997	3%	1%
1998	3%	1%
1999	4%	4%
2000	3%	2%
2001	0%	2%
2002	1%	1%
2003	2%	2%
2004	3%	2%
2005	2%	1%
2006	2%	2%
2007	1%	1%
2008	-1%	-2%
2009	-4%	-3%
2010	2%	2%
2011	1%	1%

Source: Regional Economic Modeling Inc., HRPDC

Figure 1.7 Percent Growth in Employment and Gross Regional Product in Hampton Roads					
Year	Employment	GRP	Year	Employment	GRP
1970	-2%	-5%	1991	-1%	0%
1971	0%	1%	1992	0%	2%
1972	2%	4%	1993	1%	2%
1973	4%	6%	1994	0%	2%
1974	3%	2%	1995	2%	1%
1975	-2%	-1%	1996	2%	1%
1976	2%	3%	1997	2%	0%
1977	4%	5%	1998	1%	0%
1978	5%	6%	1999	1%	3%
1979	1%	3%	2000	2%	2%
1980	2%	2%	2001	1%	2%
1981	1%	4%	2002	1%	2%
1982	1%	1%	2003	1%	3%
1983	3%	6%	2004	2%	4%
1984	5%	7%	2005	2%	1%
1985	5%	5%	2006	1%	3%
1986	4%	5%	2007	1%	1%
1987	4%	5%	2008	-1%	-2%
1988	2%	3%	2009	-3%	-3%
1989	2%	3%	2010	-1%	2%
1990	1%	2%	2011	0%	0%

Source: Regional Economic Modeling Inc., Bureau of Economic Analysis, and HRPDC

Figure 1.8: Year over Year Change in Hampton Roads' Monthly Employment							
Period	Change	Period	Change	Period	Change	Period	Change
Jan-02	1%	Oct-04	2%	Jul-07	2%	Apr-10	-1%
Feb-02	1%	Nov-04	2%	Aug-07	2%	May-10	-1%
Mar-02	1%	Dec-04	2%	Sep-07	2%	Jun-10	-1%
Apr-02	1%	Jan-05	1%	Oct-07	1%	Jul-10	0%
May-02	1%	Feb-05	2%	Nov-07	0%	Aug-10	0%
Jun-02	0%	Mar-05	1%	Dec-07	0%	Sep-10	0%
Jul-02	0%	Apr-05	2%	Jan-08	-1%	Oct-10	0%
Aug-02	0%	May-05	2%	Feb-08	0%	Nov-10	0%
Sep-02	0%	Jun-05	2%	Mar-08	-1%	Dec-10	0%
Oct-02	1%	Jul-05	2%	Apr-08	-1%	Jan-11	0%
Nov-02	0%	Aug-05	2%	May-08	-1%	Feb-11	0%
Dec-02	1%	Sep-05	2%	Jun-08	-1%	Mar-11	0%
Jan-03	1%	Oct-05	1%	Jul-08	-1%	Apr-11	0%
Feb-03	1%	Nov-05	1%	Aug-08	-1%	May-11	0%
Mar-03	1%	Dec-05	1%	Sep-08	-2%	Jun-11	0%
Apr-03	0%	Jan-06	1%	Oct-08	-1%	Jul-11	1%
May-03	0%	Feb-06	1%	Nov-08	-2%	Aug-11	0%
Jun-03	0%	Mar-06	1%	Dec-08	-2%	Sep-11	0%
Jul-03	1%	Apr-06	1%	Jan-09	-2%	Oct-11	0%
Aug-03	1%	May-06	1%	Feb-09	-3%	Nov-11	0%
Sep-03	0%	Jun-06	1%	Mar-09	-3%	Dec-11	0%
Oct-03	0%	Jul-06	1%	Apr-09	-3%	Jan-12	1%
Nov-03	1%	Aug-06	0%	May-09	-3%	Feb-12	0%
Dec-03	0%	Sep-06	0%	Jun-09	-4%	Mar-12	0%
Jan-04	1%	Oct-06	1%	Jul-09	-4%	Apr-12	0%
Feb-04	1%	Nov-06	1%	Aug-09	-4%	May-12	0%
Mar-04	1%	Dec-06	1%	Sep-09	-4%	Jun-12	1%
Apr-04	2%	Jan-07	1%	Oct-09	-3%	Jul-12	1%
May-04	2%	Feb-07	1%	Nov-09	-3%	Aug-12	1%
Jun-04	2%	Mar-07	1%	Dec-09	-3%	Sep-12	1%
Jul-04	2%	Apr-07	1%	Jan-10	-2%	Oct-12	1%
Aug-04	2%	May-07	1%	Feb-10	-2%		
Sep-04	2%	Jun-07	1%	Mar-10	-2%		

Source: Bureau of Labor Statistics

Figure 1.9: Hampton Roads Monthly Employment as a Percent of the United States (Seasonally Adjusted)							
Period	Ratio	Period	Ratio	Period	Ratio	Period	Ratio
Jan-02	0.56%	Oct-04	0.57%	Jul-07	0.57%	Apr-10	0.57%
Feb-02	0.56%	Nov-04	0.57%	Aug-07	0.57%	May-10	0.57%
Mar-02	0.56%	Dec-04	0.57%	Sep-07	0.57%	Jun-10	0.57%
Apr-02	0.56%	Jan-05	0.57%	Oct-07	0.56%	Jul-10	0.57%
May-02	0.56%	Feb-05	0.57%	Nov-07	0.56%	Aug-10	0.57%
Jun-02	0.56%	Mar-05	0.57%	Dec-07	0.56%	Sep-10	0.57%
Jul-02	0.56%	Apr-05	0.57%	Jan-08	0.56%	Oct-10	0.57%
Aug-02	0.56%	May-05	0.57%	Feb-08	0.56%	Nov-10	0.56%
Sep-02	0.56%	Jun-05	0.57%	Mar-08	0.56%	Dec-10	0.56%
Oct-02	0.57%	Jul-05	0.57%	Apr-08	0.56%	Jan-11	0.56%
Nov-02	0.56%	Aug-05	0.57%	May-08	0.56%	Feb-11	0.56%
Dec-02	0.57%	Sep-05	0.57%	Jun-08	0.56%	Mar-11	0.56%
Jan-03	0.57%	Oct-05	0.56%	Jul-08	0.56%	Apr-11	0.56%
Feb-03	0.57%	Nov-05	0.57%	Aug-08	0.56%	May-11	0.56%
Mar-03	0.57%	Dec-05	0.57%	Sep-08	0.56%	Jun-11	0.56%
Apr-03	0.57%	Jan-06	0.57%	Oct-08	0.56%	Jul-11	0.56%
May-03	0.57%	Feb-06	0.57%	Nov-08	0.56%	Aug-11	0.56%
Jun-03	0.57%	Mar-06	0.57%	Dec-08	0.56%	Sep-11	0.56%
Jul-03	0.57%	Apr-06	0.57%	Jan-09	0.56%	Oct-11	0.56%
Aug-03	0.57%	May-06	0.56%	Feb-09	0.56%	Nov-11	0.56%
Sep-03	0.57%	Jun-06	0.56%	Mar-09	0.57%	Dec-11	0.56%
Oct-03	0.57%	Jul-06	0.56%	Apr-09	0.56%	Jan-12	0.56%
Nov-03	0.57%	Aug-06	0.56%	May-09	0.57%	Feb-12	0.56%
Dec-03	0.57%	Sep-06	0.56%	Jun-09	0.57%	Mar-12	0.56%
Jan-04	0.57%	Oct-06	0.56%	Jul-09	0.57%	Apr-12	0.56%
Feb-04	0.57%	Nov-06	0.56%	Aug-09	0.57%	May-12	0.56%
Mar-04	0.57%	Dec-06	0.56%	Sep-09	0.57%	Jun-12	0.56%
Apr-04	0.57%	Jan-07	0.57%	Oct-09	0.57%	Jul-12	0.56%
May-04	0.57%	Feb-07	0.56%	Nov-09	0.57%	Aug-12	0.56%
Jun-04	0.57%	Mar-07	0.56%	Dec-09	0.57%	Sep-12	0.55%
Jul-04	0.57%	Apr-07	0.56%	Jan-10	0.57%	Oct-12	0.55%
Aug-04	0.57%	May-07	0.56%	Feb-10	0.57%		
Sep-04	0.57%	Jun-07	0.56%	Mar-10	0.57%		

Source: Bureau of Labor Statistics

Figure 1.10 Recent Employment Growth In Hampton Roads And Competing Statistical Areas	
Statistical Area	Growth
Washington D.C.	0%
Charleston	0%
Raleigh	0%
Charlottesville	0%
Baltimore	0%
Charlotte	0%
Richmond	-1%
Atlanta	-1%
Orlando	-1%
Jacksonville	-1%
Greenville, S.C.	-1%
Hampton Roads	-1%
Greensboro, N.C.	-2%
Roanoke	-2%
Tampa-St. Petersburg	-2%

Source: Bureau of Economic Analysis, HRPDC

Figure 1.11 Comparison of Goods and Service Employment in Hampton Roads		
Year	Goods Producing	Service Providing
1990	103,900	503,700
2000	109,000	611,300
2011	86,800	650,000

Source: Bureau of Labor Statisics

Figure 1.12 Comparison of Public Sector and Private Sector Employment in Hampton Roads			
Year	Private Employment	Government Civilian Employment	Military Employment
2001	696,907	147,164	110,148
2002	699,962	149,444	111,995
2003	711,004	151,493	113,193
2004	733,411	152,829	111,830
2005	750,813	154,276	108,269
2006	762,870	154,489	108,375
2007	778,698	155,626	106,326
2008	771,379	158,149	104,370
2009	743,409	159,915	98,333
2010	735,244	160,422	95,239
2011	738,049	160,297	92,962

Source: Bureau of Economic Analysis

Figure 1.13 Distributon of Employment in Hampton Roads by Indsutry Sector	
Industry Sector	Employment
Professional and Business Services	97,100
Local Government	87,000
Retail Trade	84,500
Leisure & Hospitality	83,100
Healthcare & Social Assistance	80,400
Federal Government	51,600
Manufacturing	51,500
Financial Activities	37,000
Minning, Logging, & Construction	35,300
Other Services	34,600
Transportation & Utilities	24,100
State Government	21,600
Wholesale Trade	20,900
Education Services	16,700
Information	11,500

Source: Bureau of Labor Statistics

Figure 1.14 Change in Hampton Roads Employment by Industrial Sector: 2008-2011		
Industry	Change in Employment	Annualized Percent Change
Healthcare & Social Assistance	4800	2%
Federal Government	4300	3%
Other Services	2300	2%
Education Services	1200	3%
State Government	800	1%
Transportation & Utilities	-1100	-1%
Local Government	-1800	-1%
Wholesale Trade	-2300	-3%
Leisure & Hospitality	-2800	-1%
Financial Activities	-3200	-3%
Information	-3300	-8%
Manufacturing	-4800	-3%
Retail Trade	-5800	-2%
Professional and Business Services	-7800	-3%
Minning, Logging, & Construction	-10000	-8%
	Source: Bureau of Labor Statistics	

Figure 1.15 Hampton Roads Industrial Location Quotients in 2009	
Industry	LQ
Military	7.93
Arts, Entertainment, and Recreation	1.32
Real Estate and Rental and Leasing	1.27
Accommodation and Food Services	1.17
Public Administration	1.17
Professional, Scientific, and Technical	1.15
Construction	1.13
Utilities	1.11

Souce: Bureau of Labor Statistics, HRPDC

Figure 1.16 Hampton Roads Sub-Sector Location Quotients in 2010	
Industry Sub-Sector	LQ
National Security & International Affairs	5.6
Transportation Equipment Manufacturing	4.7
Water Transportation	3.8
Museums, Historical Sites, etc.	2.5
Broadcasting(except Internet)	2.3
Admin.Housing Programs, Urban Planning	2.2
Support Activities for Transportation	2.2
Justice, Public Order, & Safety Activities	1.4
Amusement, Gambling, & Recreation Industries	1.4
General Merchandise	1.4
Real Estate	1.3
Gasoline Stations	1.3
Motor Vehicle & Parts Dealers	1.2
Heavy & Civil Engineering Construction	1.2
Warehousing & Storage	1.2

Source: Bureau of Labor Statistics, Virginia Employment Commission

Figure 1.17 Unemployment Rates in Hampton Roads, Virginia, and the United States (S.A.)

Period	U.S.	Va.	H.R.	Period	U.S.	Va.	H.R.	Period	U.S.	Va.	H.R.	Period	U.S.	Va.	H.R.
Jan-02	5.7%	4.1%	4.1%	Jan-05	5.3%	3.6%	4.1%	Jan-08	5.0%	3.3%	3.6%	Jan-11	9.1%	6.4%	7.0%
Feb-02	5.7%	4.2%	4.1%	Feb-05	5.4%	3.6%	4.1%	Feb-08	4.9%	3.4%	3.7%	Feb-11	9.0%	6.3%	6.9%
Mar-02	5.7%	4.2%	4.2%	Mar-05	5.2%	3.6%	4.1%	Mar-08	5.1%	3.4%	3.7%	Mar-11	8.9%	6.2%	6.9%
Apr-02	5.9%	4.3%	4.2%	Apr-05	5.2%	3.6%	4.0%	Apr-08	5.0%	3.5%	3.8%	Apr-11	9.0%	6.2%	6.9%
May-02	5.8%	4.3%	4.2%	May-05	5.1%	3.6%	4.0%	May-08	5.4%	3.7%	3.9%	May-11	9.0%	6.2%	6.9%
Jun-02	5.8%	4.3%	4.1%	Jun-05	5.0%	3.6%	3.9%	Jun-08	5.6%	3.8%	4.0%	Jun-11	9.1%	6.3%	7.0%
Jul-02	5.8%	4.2%	4.1%	Jul-05	5.0%	3.6%	3.9%	Jul-08	5.8%	4.0%	4.1%	Jul-11	9.1%	6.4%	7.1%
Aug-02	5.7%	4.2%	4.1%	Aug-05	4.9%	3.6%	3.9%	Aug-08	6.1%	4.1%	4.3%	Aug-11	9.1%	6.4%	7.1%
Sep-02	5.7%	4.1%	4.1%	Sep-05	5.0%	3.5%	3.8%	Sep-08	6.1%	4.3%	4.5%	Sep-11	9.0%	6.3%	7.1%
Oct-02	5.7%	4.1%	4.1%	Oct-05	5.0%	3.4%	3.8%	Oct-08	6.5%	4.5%	4.8%	Oct-11	8.9%	6.2%	7.1%
Nov-02	5.9%	4.1%	4.1%	Nov-05	5.0%	3.3%	3.7%	Nov-08	6.8%	4.9%	5.1%	Nov-11	8.7%	6.2%	7.0%
Dec-02	6.0%	4.1%	4.1%	Dec-05	4.9%	3.2%	3.6%	Dec-08	7.3%	5.3%	5.6%	Dec-11	8.5%	6.1%	7.0%
Jan-03	5.8%	4.1%	4.1%	Jan-06	4.7%	3.1%	3.5%	Jan-09	7.8%	5.8%	6.0%	Jan-12	8.3%	5.8%	6.7%
Feb-03	5.9%	4.1%	4.2%	Feb-06	4.8%	3.0%	3.4%	Feb-09	8.3%	6.2%	6.4%	Feb-12	8.3%	5.7%	6.6%
Mar-03	5.9%	4.2%	4.2%	Mar-06	4.7%	3.0%	3.3%	Mar-09	8.7%	6.6%	6.7%	Mar-12	8.2%	5.6%	6.5%
Apr-03	6.0%	4.2%	4.2%	Apr-06	4.7%	3.0%	3.3%	Apr-09	8.9%	6.8%	6.9%	Apr-12	8.1%	5.6%	6.4%
May-03	6.1%	4.2%	4.3%	May-06	4.6%	3.0%	3.3%	May-09	9.4%	7.0%	7.1%	May-12	8.2%	5.6%	6.4%
Jun-03	6.3%	4.3%	4.3%	Jun-06	4.6%	3.1%	3.3%	Jun-09	9.5%	7.1%	7.2%	Jun-12	8.2%	5.7%	6.4%
Jul-03	6.2%	4.2%	4.3%	Jul-06	4.7%	3.1%	3.4%	Jul-09	9.5%	7.1%	7.2%	Jul-12	8.3%	5.9%	6.6%
Aug-03	6.1%	4.2%	4.3%	Aug-06	4.7%	3.2%	3.4%	Aug-09	9.6%	7.1%	7.2%	Aug-12	8.1%	5.9%	6.5%
Sep-03	6.1%	4.1%	4.2%	Sep-06	4.5%	3.1%	3.4%	Sep-09	9.8%	7.1%	7.3%	Sep-12	7.8%	5.9%	6.5%
Oct-03	6.0%	4.0%	4.2%	Oct-06	4.4%	3.1%	3.4%	Oct-09	10.0%	7.1%	7.3%	Oct-12	7.9%	5.7%	6.4%
Nov-03	5.8%	3.9%	4.1%	Nov-06	4.5%	3.0%	3.3%	Nov-09	9.9%	7.1%	7.4%				
Dec-03	5.7%	3.8%	4.1%	Dec-06	4.4%	3.0%	3.2%	Dec-09	9.9%	7.2%	7.5%				
Jan-04	5.7%	3.8%	4.0%	Jan-07	4.6%	2.9%	3.2%	Jan-10	9.7%	7.3%	7.5%				
Feb-04	5.6%	3.7%	4.0%	Feb-07	4.5%	2.9%	3.1%	Feb-10	9.8%	7.2%	7.5%				
Mar-04	5.8%	3.7%	4.0%	Mar-07	4.4%	2.9%	3.1%	Mar-10	9.8%	7.2%	7.5%				
Apr-04	5.6%	3.8%	4.0%	Apr-07	4.5%	2.9%	3.1%	Apr-10	9.8%	7.1%	7.5%				
May-04	5.6%	3.8%	4.0%	May-07	4.4%	2.9%	3.1%	May-10	9.6%	7.0%	7.4%				
Jun-04	5.6%	3.8%	4.0%	Jun-07	4.6%	3.0%	3.1%	Jun-10	9.4%	6.9%	7.3%				
Jul-04	5.5%	3.7%	3.9%	Jul-07	4.7%	3.1%	3.2%	Jul-10	9.5%	6.8%	7.3%				
Aug-04	5.4%	3.7%	4.0%	Aug-07	4.6%	3.1%	3.3%	Aug-10	9.6%	6.8%	7.2%				
Sep-04	5.4%	3.7%	4.0%	Sep-07	4.7%	3.2%	3.3%	Sep-10	9.5%	6.8%	7.2%				
Oct-04	5.5%	3.6%	4.0%	Oct-07	4.7%	3.2%	3.4%	Oct-10	9.5%	6.7%	7.2%				
Nov-04	5.4%	3.6%	4.0%	Nov-07	4.7%	3.3%	3.5%	Nov-10	9.8%	6.6%	7.2%				
Dec-04	5.4%	3.6%	4.1%	Dec-07	5.0%	3.3%	3.6%	Dec-10	9.4%	6.5%	7.1%				

Source: Bureau of Labor Statistics

Figure 1.18 Employment to Population Ratio in Hampton Roads and Competing Metro Areas	
Metro Area	Ratio
Washington D.C.	69%
Charlottesville	66%
Roanoke	62%
Baltimore	62%
Charlotte	61%
Richmond	60%
Charleston	60%
Greenville S.C.	59%
Hampton Roads	59%
Greensboro	59%
Orlando	58%
Jacksonville	58%
Atlanta	58%
Raleigh-Cary	58%
Tampa	52%

Source: Bureau of Economic Analysis

Figure 1.19 Indexed Employment to Population Ratio's		
Year	Hampton Roads	U.S. Metro Portion
2001	100.0	100.0
2002	99.8	98.7
2003	100.8	98.4
2004	101.4	99.2
2005	102.6	100.4
2006	102.8	101.5
2007	104.5	102.7
2008	103.9	101.6
2009	100.3	97.6
2010	98.6	96.3
2011	98.3	96.8

Source: Bureau of Economic Analysis

Figure 1.20 Per Capita Income In Hampton Roads And Competing Metro Areas	
Region	Per Capita Income
Washington DC	$59,345
Baltimore	$51,126
Charlottesville	$44,350
Richmond	$43,046
Hampton Roads	$41,976
Jacksonville	$40,709
Raleigh	$40,631
Charlotte	$40,223
Atlanta	$39,713
Tampa	$39,261
Roanoke	$39,115
Charleston	$37,685
Orlando	$35,535
Greensboro	$35,405
Greenville	$35,038
US Metro Portion Average	$43,169

Source: Bureau of Economic Analysis

Figure 1.21 Purchasing Power Of Per Capita Income In Hampton Roads And Competing Metro Areas In 2011	
Region	Purchasing Power of PCI
Baltimore	$45,204
Jacksonville	$43,354
Raleigh	$43,317
Charlotte	$43,111
Richmond	$43,003
Tampa	$42,768
Roanoke	$42,332
Charlottesville	$41,722
Washington DC	$41,413
Atlanta	$40,815
Hampton Roads	$39,863
Greenville	$37,961
Charleston	$37,798
Orlando	$36,521

Source: Bureau of Economic Analysis,
Center for Community and Economic Research

Figure 1.22 Hampton Roads Per Capita Income In Relation To The National	
Year	Ratio of HR to U.S. PCI
2001	91.5%
2002	94.0%
2003	97.3%
2004	96.5%
2005	97.1%
2006	96.9%
2007	97.9%
2008	98.0%
2009	101.2%
2010	100.8%
2011	101.0%

Source: Bureau of Economic Analysis

Figure 1.23 Real Median Family Incomes		
Year	Hampton Roads	U.S.
1989	$63,101	$63,899
1999	$66,410	$67,571
2005	$69,982	$64,305
2006	$69,342	$65,301
2007	$69,193	$66,365
2008	$71,389	$66,202
2009	$67,763	$64,044
2010	$71,189	$62,522
2011	$67,905	$61,455

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

Figure 1.24 Real Earnings Per Worker (2009 $'s)		
Year	Hampton Roads	U.S.
2001	$48,321	$52,524
2002	$50,080	$52,984
2003	$51,869	$53,667
2004	$52,648	$54,475
2005	$52,672	$54,199
2006	$53,476	$54,459
2007	$53,423	$53,915
2008	$52,630	$53,281
2009	$53,985	$52,704
2010	$54,786	$53,818
2011	$54,445	$53,768

Source: Bureau of Economic Analysis

Figure 2.1 Cycle Of National Defense Spending (2012 Dollars)							
Quarter	Billions	Quarter	Billions	Quarter	Billions	Quarter	Billions
1972 I	385.4	1983 I	490.4	1994 I	508.9	2005 I	678.3
1972 II	392.4	1983 II	501.8	1994 II	512.4	2005 II	682.7
1972 III	363.7	1983 III	504.1	1994 III	526.9	2005 III	698.8
1972 IV	369.3	1983 IV	515.5	1994 IV	502.4	2005 IV	669.4
1973 I	376.8	1984 I	536.4	1995 I	502.6	2006 I	698.6
1973 II	370.6	1984 II	542.3	1995 II	500.9	2006 II	702.1
1973 III	350.2	1984 III	539.4	1995 III	494.8	2006 III	696.0
1973 IV	353.2	1984 IV	560.2	1995 IV	482.2	2006 IV	707.6
1974 I	360.2	1985 I	564.3	1996 I	498.2	2007 I	700.7
1974 II	364.6	1985 II	576.1	1996 II	501.3	2007 II	717.1
1974 III	357.7	1985 III	595.8	1996 III	490.0	2007 III	734.1
1974 IV	359.9	1985 IV	600.6	1996 IV	487.5	2007 IV	736.3
1975 I	355.7	1986 I	590.0	1997 I	473.4	2008 I	759.8
1975 II	349.2	1986 II	607.1	1997 II	482.2	2008 II	775.2
1975 III	362.3	1986 III	627.1	1997 III	478.6	2008 III	805.1
1975 IV	365.1	1986 IV	606.1	1997 IV	481.1	2008 IV	808.0
1976 I	361.1	1987 I	614.9	1998 I	454.0	2009 I	791.0
1976 II	361.6	1987 II	626.9	1998 II	470.9	2009 II	818.0
1976 III	361.7	1987 III	632.9	1998 III	475.9	2009 III	834.3
1976 IV	364.2	1987 IV	626.8	1998 IV	472.5	2009 IV	839.0
1977 I	369.8	1988 I	621.6	1999 I	471.0	2010 I	839.9
1977 II	374.1	1988 II	614.6	1999 II	471.5	2010 II	853.4
1977 III	370.5	1988 III	602.3	1999 III	486.0	2010 III	865.8
1977 IV	367.4	1988 IV	612.9	1999 IV	498.0	2010 IV	853.9
1978 I	368.5	1989 I	596.5	2000 I	474.5	2011 I	829.5
1978 II	373.9	1989 II	604.3	2000 II	493.5	2011 II	847.6
1978 III	374.4	1989 III	611.2	2000 III	485.1	2011 III	851.7
1978 IV	377.5	1989 IV	599.1	2000 IV	484.4	2011 IV	825.5
1979 I	378.1	1990 I	603.6	2001 I	493.5	2012 I	815.0
1979 II	382.7	1990 II	599.3	2001 II	497.8	2012 II	813.3
1979 III	382.0	1990 III	589.0	2001 III	503.7	2012 III	834.5
1979 IV	392.3	1990 IV	604.7	2001 IV	511.4		
1980 I	402.7	1991 I	608.8	2002 I	531.7		
1980 II	404.9	1991 II	603.5	2002 II	544.0		
1980 III	402.4	1991 III	588.9	2002 III	552.3		
1980 IV	416.8	1991 IV	571.3	2002 IV	571.3		
1981 I	420.2	1992 I	567.2	2003 I	577.5		
1981 II	433.0	1992 II	568.6	2003 II	626.2		
1981 III	433.9	1992 III	577.7	2003 III	617.7		
1981 IV	449.6	1992 IV	565.5	2003 IV	629.1		
1982 I	454.6	1993 I	543.7	2004 I	649.0		
1982 II	467.7	1993 II	536.7	2004 II	655.2		
1982 III	473.3	1993 III	531.5	2004 III	674.0		
1982 IV	488.8	1993 IV	536.4	2004 IV	658.2		

Source: Bureau of Economic Analysis

Figure 2.2 Inflation-Adjusted Department Of Defense Spending In Hampton Roads	
Year	Millions of Dollars
1995	15,353.9
1996	10,183.3
1997	9,523.5
1998	11,567.3
1999	11,363.6
2000	11,258.1
2001	17,154.0
2002	13,286.5
2003	12,296.9
2004	14,063.6
2005	13,970.1
2006	16,002.3
2007	16,470.5
2008	14,039.9
2009	15,450.5
2010	15,866.8

Source: Consolidated Federal Funds Report

Figure 2.3 Total Military Personnel in Hampton Roads	
2001	110,148
2002	111,995
2003	113,193
2004	111,830
2005	108,269
2006	108,375
2007	106,326
2008	104,370
2009	98,333
2010	95,239
2011	92,962

Source: Bureau of Economic Analysis

Figure 2.4 Concentration of Military Employment	
Year	Percent
1997	12.2%
1998	11.6%
1999	11.7%
2000	11.7%
2001	11.5%
2002	11.6%
2003	11.6%
2004	11.2%
2005	10.7%
2006	10.5%
2007	10.2%
2008	10.1%
2009	9.8%
2010	9.6%
2011	9.4%

Source: Bureau of Economic Analysis

Figure 2.5 Inflation Adjusted Military Incomes	
Year	Billions of Dollars
2001	7.95
2002	8.75
2003	9.32
2004	9.90
2005	9.90
2006	10.53
2007	10.64
2008	10.52
2009	10.64
2010	10.69
2011	10.45

Source: Bureau of Economic Analysis

Figure 2.6 Total Ship Building And Repair Employment In Hampton Roads	
Year	Employment
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
2010	23,700
2011	24,300

Source: Bureau of Labor Statistics

Figure 2.7 Concentration Of Ship Building & Repair Employment- Hampton Roads	
Year	Share
2001	13%
2002	14%
2003	14%
2004	14%
2005	14%
2006	14%
2007	14%
2008	15%
2009	18%
2010	19%
2011	20%

Source: Bureau of Labor Statistics

Figure 2.8 Distribution of Market Share For East Coast Container Ports	
Port	Market Share
New York/New Jersey	33.7%
Savannah	18.0%
Hampton Roads	11.8%
Charleston	8.5%
Jacksonville	5.5%
Miami	5.6%
Port Everglades	5.4%
Other	11.6%

Source: American Association of Port Authorities

Figure 2.9 Hampton Roads Market Share Of Imports & Exports At East Coast Ports		
Year	Value	Weight
2003	11.2%	9.6%
2004	11.0%	9.6%
2005	11.1%	9.8%
2006	10.8%	10.1%
2007	10.9%	12.4%
2008	10.6%	14.9%
2009	10.8%	15.4%
2010	9.7%	15.9%

Source: Census Bureau's Foreign Trade Division

Figure 2.10 Foreign And Domestic Vessel Departures		
Year	American	Foreign
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	294	2353
2010	285	2410
2011	297	2507

Source: Virginia Port Authority

Figure 2.11 General Cargo Imports & Exports (Short Tons)		
Year	Exports	Imports
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
2010	8,501,716	6,820,986
2011	8,791,282	6,824,657

Source: Virginia Port Authority

Figure 2.12 Twenty-Foot Equivalent Units Handled by the Virginia Port Authority	
Year	TEUs
1998	1,251,891
1999	1,306,537
2000	1,347,517
2001	1,303,797
2002	1,437,779
2003	1,646,279
2004	1,808,933
2005	1,981,955
2006	2,046,285
2007	2,128,366
2008	2,083,278
2009	1,745,228
2010	1,895,018

Source: Virginia Port Authority

Figure 2.13 Coal Loadings	
Year	Thousands of Short Tons
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	28,340,278
2007	44,090,371
2008	31,898,482
2009	38,110,152
2010	47,054,362
2011	38,110,152

Source: Virginia Port Authority

Figure 2.14 Hampton Roads Deseasonalized Taxable Hotel Sales							
Month	Sales	Month	Sales	Month	Sales	Month	Sales
Jan-02	$ 47,602,057	Jul-04	$ 50,272,163	Jan-07	$ 57,634,724	Jul-09	$ 52,304,402
Feb-02	$ 49,115,129	Aug-04	$ 49,233,223	Feb-07	$ 57,576,233	Aug-09	$ 53,558,479
Mar-02	$ 53,975,678	Sep-04	$ 51,540,919	Mar-07	$ 60,031,867	Sep-09	$ 53,869,929
Apr-02	$ 49,781,823	Oct-04	$ 51,831,175	Apr-07	$ 61,488,232	Oct-09	$ 52,731,230
May-02	$ 49,208,296	Nov-04	$ 50,223,664	May-07	$ 61,399,457	Nov-09	$ 53,435,608
Jun-02	$ 50,050,502	Dec-04	$ 52,306,338	Jun-07	$ 61,383,867	Dec-09	$ 53,876,790
Jul-02	$ 49,073,999	Jan-05	$ 51,948,319	Jul-07	$ 56,097,284	Jan-10	$ 54,267,632
Aug-02	$ 50,146,441	Feb-05	$ 52,344,673	Aug-07	$ 58,779,167	Feb-10	$ 50,547,122
Sep-02	$ 46,979,066	Mar-05	$ 52,135,478	Sep-07	$ 58,321,678	Mar-10	$ 52,468,139
Oct-02	$ 48,940,399	Apr-05	$ 50,409,717	Oct-07	$ 62,711,711	Apr-10	$ 50,925,214
Nov-02	$ 46,516,135	May-05	$ 50,584,263	Nov-07	$ 59,882,760	May-10	$ 52,149,818
Dec-02	$ 45,972,474	Jun-05	$ 52,450,289	Dec-07	$ 54,525,944	Jun-10	$ 53,747,239
Jan-03	$ 51,666,662	Jul-05	$ 54,016,868	Jan-08	$ 56,949,313	Jul-10	$ 56,083,625
Feb-03	$ 47,569,690	Aug-05	$ 53,313,120	Feb-08	$ 57,690,060	Aug-10	$ 56,139,487
Mar-03	$ 45,433,164	Sep-05	$ 53,455,650	Mar-08	$ 58,279,643	Sep-10	$ 53,722,358
Apr-03	$ 50,256,527	Oct-05	$ 52,631,624	Apr-08	$ 55,056,852	Oct-10	$ 53,469,949
May-03	$ 50,322,636	Nov-05	$ 53,401,581	May-08	$ 57,777,877	Nov-10	$ 54,661,113
Jun-03	$ 50,297,576	Dec-05	$ 55,994,607	Jun-08	$ 56,530,848	Dec-10	$ 54,114,225
Jul-03	$ 51,069,821	Jan-06	$ 55,872,398	Jul-08	$ 54,646,578	Jan-11	$ 53,491,355
Aug-03	$ 52,978,054	Feb-06	$ 55,660,055	Aug-08	$ 58,642,925	Feb-11	$ 55,823,339
Sep-03	$ 47,361,577	Mar-06	$ 55,010,509	Sep-08	$ 48,473,245	Mar-11	$ 54,575,742
Oct-03	$ 60,472,390	Apr-06	$ 55,163,073	Oct-08	$ 55,800,936	Apr-11	$ 56,483,750
Nov-03	$ 55,440,029	May-06	$ 53,769,611	Nov-08	$ 53,867,906	May-11	$ 54,789,037
Dec-03	$ 53,852,620	Jun-06	$ 54,960,922	Dec-08	$ 53,329,779	Jun-11	$ 54,836,757
Jan-04	$ 52,242,511	Jul-06	$ 53,974,638	Jan-09	$ 57,062,597	Jul-11	$ 55,181,822
Feb-04	$ 51,457,286	Aug-06	$ 54,588,649	Feb-09	$ 57,296,033	Aug-11	$ 52,886,892
Mar-04	$ 49,223,236	Sep-06	$ 56,387,998	Mar-09	$ 55,036,544	Sep-11	$ 56,196,728
Apr-04	$ 51,478,832	Oct-06	$ 55,063,638	Apr-09	$ 55,139,843	Oct-11	$ 56,449,225
May-04	$ 51,848,547	Nov-06	$ 57,018,634	May-09	$ 53,141,823	Nov-11	$ 55,762,298
Jun-04	$ 50,170,834	Dec-06	$ 55,346,654	Jun-09	$ 51,650,537	Dec-11	$ 58,012,789

Sources: Virginia Department of Taxation, ODU Forecasting, HRPDC

Figure 2.15 Employment In The Hampton Roads Leisure And Hospitality Industry	
Year	Employment
1997	71,700
1998	72,400
1999	72,900
2000	74,200
2001	76,200
2002	76,500
2003	76,500
2004	79,000
2005	82,000
2006	84,500
2007	85,900
2008	85,900
2009	83,300
2010	83,400
2011	83,100

Source: Bureau of Labor Statistics

Figure 2.16 Estimates of Tourism Expenditures and Local Tax Reciepts in Hampton Roads (Thousands of $s)		
Year	Expenditures	Tax Reciepts
2003	2,786,324	107,535
2004	2,980,716	114,956
2005	3,279,009	123,741
2006	3,516,232	144,794
2007	3,743,069	139,344
2008	3,826,405	145,063
2009	3,506,024	132,786
2010	3,693,972	134,929
2011	3,979,361	140,670

Source: Virginia Tourism Corporation

Figure 2.17 Construction Employment In Hampton Roads	
Year	Employment
2001	46,172
2002	44,986
2003	45,791
2004	48,668
2005	50,170
2006	49,736
2007	47,968
2008	45,205
2009	38,246
2010	36,811
2011	35,347

Source: Virginia Employment Commision

Figure 2.18 Distribution Of Hampton Roads Construction Employment in 2009	
Sub Sector	Percent of Total
Building Equipment Contractors	29.9%
Heavy and Civil Engineering Construction	18.8%
Foundation, Structure, and Building Exterior	11.3%
Building Finishing Contractors	10.2%
Nonresidential Building Construction	10.1%
Other Specialty Trade Contractors	9.1%
Residential Building Construction	8.6%

Source: Virginia Employment Commision

Figure 2.19 New Building Permits Issued In Hampton Roads					
Year	Total	1 Unit	2 Units	3 & 4 Units	5 Units and More
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	10,290	7,719	358	251	1,962
2006	7,859	5,892	232	382	1,353
2007	6,276	4,519	112	164	1,491
2008	5,045	3,150	66	40	1,789
2009	5,000	2,830	82	7	2,081
2010	4,306	3,170	38	24	1,074
2011	4,732	2,903	22	38	1,769

Source: U.S. Census Bureau

Figure 2.20 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
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	$ 756	$ 593	$ 9	$ 3	$ 137
2009	$ 639	$ 531	$ 8	$ 1	$ 100
2010	$ 694	$ 626	$ 4	$ 2	$ 62
2011	$ 653	$ 565	$ 2	$ 4	$ 83

Source: U.S. Census Bureau

Figure 2.21 Total Retail Trade Employment for Hampton Roads and the U.S.		
Year	Hampton Roads	U.S.
1997	82,700	14,388,900
1998	84,700	14,609,300
1999	87,000	14,970,100
2000	87,800	15,279,800
2001	88,200	15,238,600
2002	88,300	15,025,100
2003	87,200	14,917,300
2004	90,200	15,058,200
2005	90,900	15,279,600
2006	92,200	15,353,300
2007	93,700	15,520,000
2008	90,300	15,283,000
2009	84,100	14,522,300
2010	83,900	14,440,400
2011	84,500	14,642,900

Source: Bureau of Labor Statistics

Figure 2.22 Distribution Of Hampton Roads Retail Employment	
Sector	Percent of Retail Employment
General Merchandise Stores	24.9%
Food and Beverage Stores	15.2%
Motor Vehicle and Parts Dealers	12.4%
Clothing and Clothing Accessories Stores	9.9%
Gasoline Stations	7.0%
Building Material and Garden Equipment and Su	6.3%
Miscellaneous Store Retailers	5.6%
Health and Personal Care Stores	5.3%
Other	13.4%

Source: Virginia Employment Commision

Figure 2.23 Inflation Adjusted Taxable Sales In Hampton Roads	
Year	Taxable Sales
1997	$ 17,326,160,357
1998	$ 17,605,380,202
1999	$ 18,270,472,023
2000	$ 18,433,722,657
2001	$ 18,284,982,865
2002	$ 18,674,999,407
2003	$ 19,361,068,272
2004	$ 20,463,480,900
2005	$ 21,067,502,100
2006	$ 21,515,716,938
2007	$ 21,623,326,966
2008	$ 20,010,353,965
2009	$ 19,095,630,662
2010	$ 18,755,138,300
2011	$ 19,381,230,500

Source: Virginia Department of Taxation

Figure 3.1 Population of Hampton Roads and Competing Metro Areas in 2011

Metro Area	Population
Washington D.C.	5,703,948
Atlanta	5,359,205
Tampa	2,824,724
Baltimore	2,729,110
Orlando	2,171,360
Charlotte	1,795,472
Hampton Roads	1,679,894
Jacksonville FL	1,360,251
Richmond	1,269,380
Raleigh-Cary	1,163,515
Greensboro-High Point	730,966
Charleston S.C.	682,121
Greenville SC	647,401
Roanoke	308,861
Charlottesville	203,882

Source: U.S. Census Bureau

Figure 3.2 Population Growth Rates in Hampton Roads and the United States

Year	Hampton Roads	U.S.
1997	0.6%	1.2%
1998	0.2%	1.2%
1999	0.8%	1.2%
2000	0.9%	1.1%
2001	0.6%	1.0%
2002	0.4%	0.9%
2003	0.6%	0.9%
2004	1.4%	0.9%
2005	0.6%	0.9%
2006	0.2%	1.0%
2007	0.3%	1.0%
2008	0.6%	0.9%
2009	0.6%	0.8%
2010	0.4%	0.9%
2011	0.7%	0.7%

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

Figure 3.3 Hampton Roads Population Density

Year	Persons Per Square Mile
1997	531.8
1998	533.0
1999	537.3
2000	541.9
2001	545.0
2002	547.3
2003	550.5
2004	558.2
2005	561.6
2006	563.0
2007	564.7
2008	568.0
2009	571.5
2010	573.9
2011	577.8

Source: Weldon Cooper Center

Figure 3.4 Components of Population Change in Hampton Roads

Year	Births	Deaths	Net Migration
1996	23,392	11,400	-6,842
1997	22,737	11,420	-4,667
1998	23,186	11,683	-4,803
1999	22,968	11,977	-2,991
2000	23,465	11,911	3,218
2001	23,047	11,964	461
2002	23,114	12,251	-4,005
2003	23,359	12,370	-2,032
2004	24,264	12,155	4,421
2005	23,885	12,029	4,991
2006	24,398	12,122	-4,553
2007	24,437	12,543	-6,507
2008	23,842	12,378	-4,273
2009	23,477	12,535	-5,625
2010	22,790	12,452	-1,346

Source: 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	465,418	951,078	162,962
2001	465,516	956,729	165,317
2002	469,095	965,058	167,436
2003	471,215	967,459	169,893
2004	475,126	986,315	172,438
2005	473,432	990,261	175,598
2006	473,108	1,004,113	178,428
2007	468,211	1,003,455	181,838
2008	463,494	1,001,731	187,090
2009	459,759	1,006,511	191,836
2010	445,151	1,030,584	193,341
2011	441,924	1,029,841	199,039
2012	438,651	1,022,115	208,905

Source: Regional Economic Modeling, Inc.

Figure 3.6 Dependency Ration in the U.S. and Hampton Roads		
Year	Hampton Roads	United States
1990	64%	70%
1991	64%	70%
1992	64%	70%
1993	64%	70%
1994	65%	71%
1995	65%	71%
1996	65%	71%
1997	66%	71%
1998	67%	70%
1999	66%	70%
2000	66%	69%
2001	66%	69%
2002	66%	68%
2003	66%	68%
2004	66%	67%
2005	66%	67%
2006	65%	67%
2007	65%	67%
2008	65%	67%
2009	65%	67%
2010	62%	67%
2011	62%	66%
2012	63%	67%

Source: Regional Economic Modeling, Inc.

Figure 3.7 Gender Distribution in Hampon Roads		
Year	Male	Female
1990	733	728
2000	778	801
2012	819	851

Source: Regional Economic Modeling, Inc.

Figure 3.8 Race and Ethnicity in Hampton Roads				
Year	Caucasian	African American	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	956,011	496,807	76,609	50,030
2001	954,767	499,061	79,057	54,677
2002	955,679	503,980	82,794	59,137
2003	954,223	506,128	85,548	62,666
2004	963,752	512,839	89,377	67,910
2005	960,221	514,603	93,288	71,180
2006	962,576	520,058	97,094	75,919
2007	954,871	518,995	100,302	79,335
2008	947,726	518,836	103,133	82,621
2009	943,847	520,081	107,291	86,887
2010	944,152	524,619	110,800	89,506
2011	939,775	527,101	112,557	91,372
2012	933,518	528,947	114,132	93,077

Source: Regional Economic Modeling, Inc.

Figure 3.9 Distribution of Hampton Roads Occupations	
Occupation	Employment
Office and Administrative Support	113,050
Sales	76,990
Food Preparation & Serving	70,790
Transportation & Material Moving	47,310
Education, Training, & Library	46,240
Business & Financial Operations	39,380
Healthcare Practitioners & Technical	38,360
Construction & Extraction	36,080
Production	34,740
Other	214,250

Source: Bureau of Labor Statistics

Figure 3.10 Differences Between U.S. and Hampton Roads Occupation Distribution		
Occupations	Hampton Roads	United States
Production	5%	7%
Management	4%	5%
Office & Administrative Support	16%	17%
Healthcare Practitioners & Technical	5%	6%
Installation, Maintenance, & Repair	4%	4%
Business and Financial Operations	5%	5%
Food Preparation & Serving Related	10%	9%
Construction and Extraction	5%	4%
Architecture and Engineering	3%	2%

Source: Bureau of Labor Statistics

Figure 4.1 Deseaonalized Pre-Owned and New Construction Home Sales in Hampton Roads

Date	New	Resale	Date	New	Resale	Date	New	Resale
Jan-97	417	1,113	May-02	390	1,638	Sep-07	311	1,263
Feb-97	414	1,111	Jun-02	395	1,525	Oct-07	337	1,413
Mar-97	388	1,081	Jul-02	503	1,573	Nov-07	327	1,372
Apr-97	390	1,080	Aug-02	424	1,578	Dec-07	320	1,273
May-97	413	1,126	Sep-02	424	1,605	Jan-08	305	1,400
Jun-97	338	1,090	Oct-02	453	1,760	Feb-08	404	1,182
Jul-97	385	1,069	Nov-02	468	1,681	Mar-08	339	1,233
Aug-97	348	1,145	Dec-02	373	1,846	Apr-08	336	1,317
Sep-97	396	1,142	Jan-03	514	1,862	May-08	251	1,231
Oct-97	412	1,260	Feb-03	396	1,769	Jun-08	260	1,183
Nov-97	393	1,143	Mar-03	378	1,653	Jul-08	261	1,267
Dec-97	393	1,213	Apr-03	394	1,658	Aug-08	246	1,226
Jan-98	415	1,228	May-03	401	1,648	Sep-08	260	1,181
Feb-98	376	1,215	Jun-03	404	1,659	Oct-08	235	1,135
Mar-98	418	1,268	Jul-03	379	1,843	Nov-08	227	920
Apr-98	362	1,298	Aug-03	362	1,777	Dec-08	239	1,020
May-98	360	1,212	Sep-03	344	1,711	Jan-09	199	994
Jun-98	467	1,301	Oct-03	405	2,024	Feb-09	228	1,147
Jul-98	377	1,287	Nov-03	444	1,537	Mar-09	195	1,109
Aug-98	422	1,191	Dec-03	437	1,787	Apr-09	192	1,111
Sep-98	452	1,356	Jan-04	507	1,738	May-09	201	1,128
Oct-98	413	1,348	Feb-04	504	1,738	Jun-09	215	1,250
Nov-98	414	1,298	Mar-04	501	1,735	Jul-09	246	1,360
Dec-98	441	1,454	Apr-04	521	1,917	Aug-09	249	1,307
Jan-99	386	1,439	May-04	419	1,803	Sep-09	225	1,438
Feb-99	460	1,426	Jun-04	416	1,930	Oct-09	247	1,729
Mar-99	457	1,423	Jul-04	425	1,959	Nov-09	324	1,712
Apr-99	563	1,370	Aug-04	438	1,981	Dec-09	227	1,262
May-99	381	1,250	Sep-04	500	2,124	Jan-10	133	1,088
Jun-99	444	1,432	Oct-04	445	2,061	Feb-10	192	1,215
Jul-99	484	1,444	Nov-04	410	2,116	Mar-10	189	1,225
Aug-99	460	1,343	Dec-04	410	2,061	Apr-10	206	1,439
Sep-99	417	1,310	Jan-05	452	1,962	May-10	223	1,334
Oct-99	412	1,252	Feb-05	380	2,010	Jun-10	286	1,294
Nov-99	420	1,372	Mar-05	511	2,041	Jul-10	210	982
Dec-99	415	1,474	Apr-05	409	1,940	Aug-10	198	1,073
Jan-00	414	1,258	May-05	412	1,998	Sep-10	217	1,091
Feb-00	359	1,251	Jun-05	450	2,012	Oct-10	160	1,117
Mar-00	429	1,351	Jul-05	434	1,944	Nov-10	199	1,189
Apr-00	380	1,355	Aug-05	444	2,097	Dec-10	169	1,322
May-00	427	1,501	Sep-05	415	2,059	Jan-11	205	1,265
Jun-00	438	1,445	Oct-05	349	1,970	Feb-11	185	1,292
Jul-00	394	1,246	Nov-05	423	2,105	Mar-11	204	1,334
Aug-00	398	1,393	Dec-05	438	2,107	Apr-11	228	1,255
Sep-00	384	1,468	Jan-06	387	1,910	May-11	207	1,269
Oct-00	506	1,381	Feb-06	440	1,996	Jun-11	218	1,201
Nov-00	321	1,422	Mar-06	401	2,056	Jul-11	161	1,175
Dec-00	385	1,334	Apr-06	411	1,906	Aug-11	177	1,244
Jan-01	380	1,267	May-06	444	1,954	Sep-11	169	1,330
Feb-01	420	1,516	Jun-06	506	1,873	Oct-11	192	1,309
Mar-01	408	1,608	Jul-06	373	1,698	Nov-11	191	1,291
Apr-01	475	1,495	Aug-06	400	1,723	Dec-11	210	1,406
May-01	508	1,564	Sep-06	394	1,703	Jan-12	232	1,384
Jun-01	419	1,554	Oct-06	383	1,706	Feb-12	209	1,328
Jul-01	409	1,527	Nov-06	326	1,675	Mar-12	240	1,308
Aug-01	478	1,626	Dec-06	373	1,775	Apr-12	212	1,321
Sep-01	448	1,490	Jan-07	394	1,818	May-12	214	1,248
Oct-01	317	1,581	Feb-07	365	1,891	Jun-12	182	1,285
Nov-01	493	1,589	Mar-07	443	1,732	Jul-12	229	1,337
Dec-01	490	1,503	Apr-07	310	1,650	Aug-12	236	1,485
Jan-02	384	1,693	May-07	350	1,611	Sep-12	220	1,349
Feb-02	471	1,620	Jun-07	337	1,574	Oct-12	217	1,424
Mar-02	427	1,560	Jul-07	343	1,549			
Apr-02	390	1,627	Aug-07	310	1,526			

Source: Rose and Womble Realty, HRPDC

Figure 4.2 % Change in Housing Price Indices For Hampton Roads, The Virginia, And The United States							
Period	U.S.	Va.	H.R.	Period	U.S.	Va.	H.R.
1997q1	2%	1%	1%	2005q1	11%	19%	23%
1997q2	3%	1%	2%	2005q2	12%	21%	25%
1997q3	4%	3%	3%	2005q3	11%	19%	23%
1997q4	4%	3%	3%	2005q4	11%	18%	23%
1998q1	5%	3%	3%	2006q1	10%	16%	21%
1998q2	5%	3%	4%	2006q2	8%	12%	16%
1998q3	5%	3%	4%	2006q3	6%	8%	12%
1998q4	5%	3%	3%	2006q4	5%	6%	10%
1999q1	5%	3%	2%	2007q1	3%	4%	7%
1999q2	5%	4%	3%	2007q2	2%	3%	5%
1999q3	5%	5%	3%	2007q3	0%	1%	3%
1999q4	5%	5%	3%	2007q4	-1%	-1%	1%
2000q1	6%	6%	3%	2008q1	-2%	-2%	0%
2000q2	6%	7%	4%	2008q2	-4%	-4%	-2%
2000q3	7%	7%	5%	2008q3	-6%	-6%	-3%
2000q4	7%	7%	4%	2008q4	-7%	-6%	-4%
2001q1	8%	8%	6%	2009q1	-5%	-5%	-4%
2001q2	8%	9%	6%	2009q2	-5%	-5%	-4%
2001q3	7%	9%	6%	2009q3	-5%	-5%	-5%
2001q4	7%	9%	6%	2009q4	-5%	-5%	-5%
2002q1	6%	8%	6%	2010q1	-7%	-6%	-6%
2002q2	6%	9%	7%	2010q2	-5%	-5%	-5%
2002q3	7%	9%	8%	2010q3	-2%	-1%	-2%
2002q4	7%	9%	8%	2010q4	-2%	-1%	-3%
2003q1	6%	8%	8%	2011q1	-3%	-2%	-4%
2003q2	6%	7%	8%	2011q2	-4%	-3%	-5%
2003q3	5%	7%	8%	2011q3	-4%	-3%	-7%
2003q4	7%	10%	12%	2011q4	-3%	-1%	-5%
2004q1	7%	11%	13%	2012q1	-1%	0%	-4%
2004q2	9%	13%	17%	2012q2	0%	0%	-3%
2004q3	11%	18%	22%	2012q3	0%	0%	-2%
2004q4	10%	17%	21%				

Source: Federal Housing Finance Agency

Figure 4.3 Housing Price Increases In Hampton Roads And Competing MSAs From 2008 To 2011	
MSA	Growth Rate
Charleston	-4%
Washington DC	-5%
Greensboro	-15%
Baltimore	-16%
Hampton Roads	-17%
Jacksonville	-29%
Atlanta	-34%
Orlando	-40%

Source: National Association of Realtors

Figure 4.4 Home Ownership Rates In Hampton Roads	
Year	Rate
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%
2010	61.4%
2011	62.3%

Source: U.S. Census Bureau

Figure 4.5 Hampton Roads Housing Opportunity Index			
Period	Index	Period	Index
2004q1	68.3	2008q2	50.4
2004q2	64.5	2008q3	64.1
2004q3	62.7	2008q4	74.9
2004q4	62.9	2009q1	72.9
2005q1	57.7	2009q2	68.4
2005q2	51.9	2009q3	72.9
2005q3	51.0	2009q4	76.9
2005q4	52.6	2010q1	75.4
2006q1	44.8	2010q2	77.5
2006q2	40.3	2010q3	77.2
2006q3	46.0	2010q4	79.8
2006q4	49.5	2011q1	80.1
2007q1	48.5	2011q2	79.3
2007q2	46.7	2011q3	82.5
2007q3	50.1	2011q4	84.5
2007q4	56.5	2012q1	83.1
2008q1	51.7	2012q2	82.2

Source: National Assocation 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
2000	$11.27	219%
2001	$12.54	243%
2002	$14.29	277%
2003	$14.38	279%
2004	$15.15	294%
2005	$15.60	303%
2006	$16.23	315%
2007	$17.38	297%
2008	$17.38	297%
2009	$17.38	265%
2010	$17.96	248%
2011	$18.56	256%
2012	$20.46	282%

Source: National Low Income Housing Coalition

Figure 4.7 30 Year Fixed Mortgage Rates					
Date	Rate	Date	Rate	Date	Rate
Jan-02	7.00%	Oct-05	6.07%	Jul-09	5.22%
Feb-02	6.89%	Nov-05	6.33%	Aug-09	5.19%
Mar-02	7.01%	Dec-05	6.27%	Sep-09	5.06%
Apr-02	6.99%	Jan-06	6.15%	Oct-09	4.95%
May-02	6.81%	Feb-06	6.25%	Nov-09	4.88%
Jun-02	6.65%	Mar-06	6.32%	Dec-09	4.93%
Jul-02	6.49%	Apr-06	6.51%	Jan-10	5.03%
Aug-02	6.29%	May-06	6.60%	Feb-10	4.99%
Sep-02	6.09%	Jun-06	6.68%	Mar-10	4.97%
Oct-02	6.11%	Jul-06	6.76%	Apr-10	5.10%
Nov-02	6.07%	Aug-06	6.52%	May-10	4.89%
Dec-02	6.05%	Sep-06	6.40%	Jun-10	4.74%
Jan-03	5.92%	Oct-06	6.36%	Jul-10	4.56%
Feb-03	5.84%	Nov-06	6.24%	Aug-10	4.43%
Mar-03	5.75%	Dec-06	6.14%	Sep-10	4.35%
Apr-03	5.81%	Jan-07	6.22%	Oct-10	4.23%
May-03	5.48%	Feb-07	6.29%	Nov-10	4.30%
Jun-03	5.23%	Mar-07	6.16%	Dec-10	4.71%
Jul-03	5.63%	Apr-07	6.18%	Jan-11	4.76%
Aug-03	6.26%	May-07	6.26%	Feb-11	4.95%
Sep-03	6.15%	Jun-07	6.66%	Mar-11	4.84%
Oct-03	5.95%	Jul-07	6.70%	Apr-11	4.84%
Nov-03	5.93%	Aug-07	6.57%	May-11	4.64%
Dec-03	5.88%	Sep-07	6.38%	Jun-11	4.51%
Jan-04	5.74%	Oct-07	6.38%	Jul-11	4.55%
Feb-04	5.64%	Nov-07	6.21%	Aug-11	4.27%
Mar-04	5.45%	Dec-07	6.10%	Sep-11	4.11%
Apr-04	5.83%	Jan-08	5.76%	Oct-11	4.07%
May-04	6.27%	Feb-08	5.92%	Nov-11	3.99%
Jun-04	6.29%	Mar-08	5.97%	Dec-11	3.96%
Jul-04	6.06%	Apr-08	5.92%	Jan-12	3.92%
Aug-04	5.87%	May-08	6.04%	Feb-12	3.89%
Sep-04	5.75%	Jun-08	6.32%	Mar-12	3.95%
Oct-04	5.72%	Jul-08	6.43%	Apr-12	3.91%
Nov-04	5.73%	Aug-08	6.48%	May-12	3.80%
Dec-04	5.75%	Sep-08	6.04%	Jun-12	3.68%
Jan-05	5.71%	Oct-08	6.20%	Jul-12	3.55%
Feb-05	5.63%	Nov-08	6.09%	Aug-12	3.60%
Mar-05	5.93%	Dec-08	5.33%	Sep-12	3.50%
Apr-05	5.86%	Jan-09	5.06%	Oct-12	3.38%
May-05	5.72%	Feb-09	5.13%		
Jun-05	5.58%	Mar-09	5.00%		
Jul-05	5.70%	Apr-09	4.81%		
Aug-05	5.82%	May-09	4.86%		
Sep-05	5.77%	Jun-09	5.42%		

Source: St. Louis Federal Reserve

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
2009	-
2010	25.1

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	32.2
Charlotte	33.7
Jacksonville	30.9
Orlando	31.0
Greensboro- Winston-Salem	28.4
Greenville	28.1
Richmond	28.1
Atlanta	29.6
Tampa-St. Petersburg	27.1
Charleston-North Charleston	24.9
Baltimore	24.5
Roanoke	24.9
Hampton Roads	25.1
Charlottesville	24.5
Washington	22.3

Source: Federal Highway Administration

Figure 5.3 Delay Per Auto Commuter For Hampton Roads And Competing Regions In 2010	
Urban Area	Annual Delay Per Traveler, 2010
Washington, DC/MD/VA	74
Baltimore, MD	52
Atlanta, GA	43
Orlando, FL	38
Hampton Roads	34
Tampa-St. Petersburg, FL	33
Charleston-North Charleston, SC	25
Charlotte, NC/SC	25
Jacksonville, FL	25
Raleigh-Durham, NC	25
Richmond, VA	20

Source: Texas Transportation Institute

Figure 5.4 Delay Per Peak Period Traveler In Hampton Roads		
Year	Hampton Roads	Large Urban Area Average
1996	36	29
1997	38	30
1998	41	31
1999	43	32
2000	37	33
2001	42	34
2002	43	35
2003	42	36
2004	41	36
2005	41	37
2006	42	36
2007	40	35
2008	35	31
2009	32	31
2010	34	31

Source: Texas Transportation Institute

Figure 5.5 Hampton Roads Congestion And Congestion Costs		
Year	Millions of Dollars	Annual Hours of Delay (000's)
1990	$ 233	21,172
1991	$ 229	19,998
1992	$ 239	20,349
1993	$ 258	21,475
1994	$ 322	26,075
1995	$ 386	30,135
1996	$ 457	34,530
1997	$ 490	36,434
1998	$ 530	39,405
1999	$ 575	42,018
2000	$ 543	37,195
2001	$ 631	42,472
2002	$ 649	43,577
2003	$ 650	42,631
2004	$ 665	41,843
2005	$ 713	42,444
2006	$ 760	43,203
2007	$ 750	41,324
2008	$ 697	37,133
2009	$ 627	33,469
2010	$ 693	36,538

Source: Texas Transportation Institute

Figure 5.6 Inrix Index in 2011	
Jurisdiction	Inrix Index
Washington, DC	19.6
Baltimore	13.8
Atlanta	13.6
Hampton Roads	13.3
Tampa/St. Pete	13.3
Orlando	11.7
Charlotte	11.5
Raleigh Durham	7.9
Jacksonville	7.3
Greenville	6.9
Charleston	4.6
Richmond	1.9
Greensboro/W-S	1.0

Source: INRIX, Inc

Figure 5.7 Hampton Roads Traffic Crashes			
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
2010	13,449	23,142	121
2011	14,038	24,115	136

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	1,661,754	1,079,710	1,480,500
2010	1,666,310	1,084,462	1,478,292
2011	1,679,737	1,096,466	1,484,023

Sources: Virginia Department of Motor Vehicles, Weldon Cooper Center

Figure 5.9 Unlinked Passenger Trips on Transit In Hampton Roads (000's)	
Year	Transit Passenger Trips
1994	14,302
1995	14,547
1996	15,940
1997	16,512
1998	17,704
1999	18,478
2000	17,109
2001	17,149
2002	16,982
2003	15,860
2004	15,813
2005	16,366
2006	16,392
2007	16,290
2008	16,797
2009	18,686
2010	18,962
2011	20,239

Sources: Federal Transit Administration, APTA

Figure 5.10 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	504,292	1,786,594
2009	498,205	1,701,246
2010	519,906	1,663,294
2011	516,789	1,606,695

Source: Federal Aviation Administration

Figure 5.11 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	696,156,304
2010	2,183,200	712,045,421
2011	2,123,484	724,158,444

Source: Federal Aviation Administration

Table 5.12 Final Destinations of Hampton Roads Airport Boardings		
Region	Trips	Share
New York Area	230,080	6.7%
Atlanta, GA	228,210	6.6%
Boston/Providence/Manchester Area	211,990	6.2%
Orlando, FL	173,580	5.1%
Chicago Area	145,190	4.2%
Los Angeles Metro Area, CA	123,870	3.6%
Miami/Ft. Lauderdale Area	109,800	3.2%
San Diego, CA	106,290	3.1%
Jacksonville, FL	100,180	2.9%
Las Vegas, NV	98,550	2.9%
Other	1,905,870	55.5%
Total	3,433,610	

Source: Federal Aviation Administration

Table 5.13 Average One-way Plane Fair in Hampton Roads and the U.S.		
Year	Hampton Roads	National
2001	$178.63	$169.80
2002	$153.63	$164.91
2003	$160.32	$166.68
2004	$159.80	$161.15
2005	$161.47	$164.15
2006	$184.81	$179.50
2007	$185.48	$180.19
2008	$192.68	$191.98
2009	$177.12	$173.43
2010	$191.32	$191.29
2011	$215.63	$208.24

Source: Federal Aviation Aministration

Figure 5.14 Boardings and Alightings at Amtrak Stations In Hampton Roads Compared To The National Trend

Year	Regional Ridership	National Ridership
2002	150,575	23,406,597
2003	137,835	24,028,119
2004	128,511	25,053,564
2005	129,832	25,374,998
2006	128,837	24,306,965
2007	138,414	25,847,531
2008	166,839	28,716,407
2009	158,914	27,167,014
2010	163,405	28,716,857
2011	175,494	30,186,733

Source: Amtrak

Figure 6.1 Hampton Roads Cost Of Living Index

Category	Index
Housing	113.6
Utilities	110.9
Composite	**105.3**
Health Care	102.6
Misc. Goods and Services	101.1
Grocery	100.2
Transportation	97.7

Source: Council for Community and Economic Research

Figure 6.3 Per Capita Property Tax Collections In Hampton Roads (2011 Dollars)

Year	Real Property Tax	Personal Property Tax
1995	$ 601	$ 188
1996	$ 612	$ 204
1997	$ 622	$ 213
1998	$ 647	$ 228
1999	$ 644	$ 194
2000	$ 653	$ 178
2001	$ 663	$ 140
2002	$ 693	$ 127
2003	$ 728	$ 133
2004	$ 757	$ 142
2005	$ 805	$ 145
2006	$ 860	$ 170
2007	$ 958	$ 175
2008	$ 983	$ 181
2009	$ 1,020	$ 177
2010	$ 997	$ 161

Source: Auditor of Public Accounts

Figure 6.2 Revenue Sources Per Capita For Local Governments In Hampton Roads (2011 Dollars)

Year	Real Property Tax	Personal Property Tax	Non-Tax Revenue	Local Sales and Use Tax	Other Local Taxes
2001	$ 684	$ 145	$ 262	$ 119	$ 523
2002	$ 715	$ 131	$ 291	$ 119	$ 486
2003	$ 751	$ 137	$ 279	$ 120	$ 502
2004	$ 781	$ 146	$ 305	$ 127	$ 514
2005	$ 831	$ 150	$ 306	$ 130	$ 512
2006	$ 887	$ 176	$ 345	$ 128	$ 524
2007	$ 989	$ 180	$ 349	$ 133	$ 510
2008	$ 1,014	$ 187	$ 357	$ 124	$ 507
2009	$ 1,052	$ 182	$ 334	$ 123	$ 491
2010	$ 1,029	$ 166	$ 336	$ 116	$ 420
2011	$ 956	$ 168	$ 318	$ 114	$ 339

Source: Auditor of Public Accounts

Figure 6.4 Per Capita Local Governments Expenditures In Hampton Roads (2011 Dollars)					
Year	Education	Public Safety	Public Works	Health and Welfare	Other
2001	$ 1,541	$ 450	$ 235	$ 281	$ 373
2002	$ 1,553	$ 476	$ 241	$ 302	$ 385
2003	$ 1,587	$ 484	$ 237	$ 308	$ 398
2004	$ 1,618	$ 493	$ 288	$ 309	$ 442
2005	$ 1,688	$ 511	$ 236	$ 325	$ 421
2006	$ 1,709	$ 532	$ 250	$ 329	$ 440
2007	$ 1,818	$ 547	$ 255	$ 343	$ 471
2008	$ 1,738	$ 547	$ 261	$ 348	$ 469
2009	$ 1,841	$ 568	$ 271	$ 357	$ 494
2010	$ 1,751	$ 550	$ 263	$ 357	$ 477
2011	$ 1,645	$ 541	$ 256	$ 334	$ 432

Source: Auditor of Public Accounts

Figure 6.5 Real Per Capita Local Government Expenditures In Hampton Roads And Virginia		
Year	Hampton Roads	Virginia Average
2001	$ 2,879.92	$ 2,667.59
2002	$ 2,956.28	$ 2,758.13
2003	$ 3,012.98	$ 2,771.68
2004	$ 3,148.77	$ 2,891.33
2005	$ 3,181.43	$ 2,964.04
2006	$ 3,260.44	$ 3,022.75
2007	$ 3,435.14	$ 3,163.36
2008	$ 3,363.01	$ 3,240.09
2009	$ 3,530.94	$ 3,278.70
2010	$ 3,398.38	$ 3,129.94
2011	$ 3,207.09	$ 2,988.56

Source: Auditor of Public Accounts

Figure 6.6 Distribution Of Education Financing For Hampton Roads Jurisdictions In FY 2011	
Source	Percent of Total
Local	39.8%
State	37.7%
Retail Sales & Use Tax	9.4%
Federal	13.0%

Source: Virginia Department of Education

Figure 6.7 Real Per Pupil Expenditures in Hampton Roads And Virginia		
Year	Hampton Roads	Virginia
2001	$ 8,996.88	$ 9,713.00
2002	$ 9,070.53	$ 9,797.48
2003	$ 9,205.40	$ 10,007.59
2004	$ 9,437.47	$ 10,183.85
2005	$ 9,910.97	$ 10,598.49
2006	$ 10,159.52	$ 10,884.53
2007	$ 10,958.00	$ 11,482.18
2008	$ 11,056.66	$ 11,531.12
2009	$ 11,407.86	$ 11,864.66
2010	$ 11,027.65	$ 11,366.56
2011	$ 10,437.43	$ 10,793.04

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**	78.8%	81.8%
2009**	80.2%	83.0%
2010**	81.9%	85.3%
2011**	84.5%	86.7%
2012**	85.8%	88.0%

**From the new Logitudinal Study

Source: Virginia Department of Education

Figure 6.9 Number of Enrolled Students at Regional Universities In Fall 2011

Institution	Enrollment
Paul D Camp Community College	1,661
Thomas Nelson Community College	10,999
Tidewater Community College	32,101
Eastern Virginia Medical School	1,098
Virginia Wesleyan University	1,431
Hampton University	4,754
Christopher Newport University	5,168
Regent University	5,864
Norfolk State University	7,100
College of William and Mary	8,258
Old Dominion University	24,670

Source: State Council for Higher Education

Figure 6.10 Violent Crime Rate In Hampton Roads (Per 100,000 Persons)

Year	Hampton Roads	United States
2001	434.8	504.5
2002	463.1	494.4
2003	434.9	475.8
2004	429.3	463.2
2005	470.3	469.0
2006	462.3	479.3
2007	439.9	471.8
2008	425.5	458.6
2009*		431.9
2010	336.9	403.6
2011	324.4	386.3

Source: Federal Bureau of Investigation

*Hampton Roads not included on 2009 Data

Figure 6.11 Poverty Rates For Hampton Roads And The United States

Year	Hampton Roads	United States
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%
2009	10.5%	14.3%
2010	11.1%	15.3%
2011	11.9%	15.9%

Source: U.S. Census Bureau

Figure 6.12 Hampton Roads Air Quality In 2011	
Pollutant	Percent of Primary Standard
Ozone	101.3%
Sulphur Dioxide	72.0%
Nitrogen Dioxide	18.9%
Carbon Monoxide	12.0%

Source: Virginia Department of Environmental Quality

Figure 6.13 Ozone Levels In Hampton Roads	
Year	Ozone Parts Per Billion- 3 Year Average
2001	88
2002	89
2003	90
2004	86
2005	78
2006	76
2007	77
2008	77
2009	74
2010	72
2011	71

Source: Virginia Department of Environmental Quality

Figure 6.14 Gross Leasable Retail Space In Hampton Roads		
Year	Gross Leasable Area	Vacancy Rate
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%
2011	52,567,962	8.9%

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
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	12.94%
2010	12.48%

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
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
2010	70

Source: U.S. Patent and Trademark Office

Figure 7.1 Population	
Locality	2011
Chesapeake	225,898
Franklin	8,680
Gloucester	36,987
Hampton	137,372
Isle of Wight	35,457
James City	68,874
Newport News	181,027
Norfolk	243,985
Poquoson	12,240
Portsmouth	96,368
Southampton	18,714
Suffolk	85,692
Surry	6,968
Virginia Beach	441,246
Williamsburg	14,256
York	65,973

Souce: Weldon Cooper Center

Figure 7.2 Population Density	
Locality	2011
Chesapeake	664
Franklin	1,085
Gloucester	164
Hampton	2,642
Isle of Wight	112
James City	450
Newport News	2,586
Norfolk	4,518
Poquoson	765
Portsmouth	2,920
Southampton	31
Suffolk	214
Surry	25
Virginia Beach	1,779
Williamsburg	1,584
York	622

Souce: Weldon Cooper Center

Figure 7.3 5-Year Population Growth	
Locality	2006-2011
Chesapeake	10,394
Franklin	82
Gloucester	626
Hampton	(4,607)
Isle of Wight	2,438
James City	8,406
Newport News	(519)
Norfolk	4,630
Poquoson	183
Portsmouth	(1,084)
Southampton	886
Suffolk	6,126
Surry	(85)
Virginia Beach	6,245
Williamsburg	845
York	3,905

Souce: Weldon Cooper Center

Figure 7.4 5-Year Population & Employment Growth Rate (2006-2011)		
Locality	Population	Employment
Chesapeake	5%	-5%
Franklin	1%	3%
Gloucester	2%	-8%
Hampton	-3%	-7%
Isle of Wight	7%	-18%
James City	14%	6%
Newport News	0%	-2%
Norfolk	2%	-3%
Poquoson	2%	-13%
Portsmouth	-1%	0%
Southampton	5%	-19%
Suffolk	8%	2%
Surry	-1%	11%
Virginia Beach	1%	-9%
Williamsburg	6%	-20%
York	6%	3%

ouce: Weldon Cooper Center< Virginia Employment Commission

Figure 7.5 Per Capita Income	
Locality	2011
Chesapeake	$42,504
Franklin	$31,313
Gloucester	$38,886
Hampton	$40,001
Isle of Wight	$42,883
James City	$52,228
Newport News	$34,752
Norfolk	$36,873
Poquoson	$47,564
Portsmouth	$37,583
Southampton	$31,313
Suffolk	$39,279
Surry	$34,860
Virginia Beach	$46,799
Williamsburg	$52,228
York	$47,564

Source: Bureau of Economic Analysis

Figure 7.6 Unemployment	
Locality	2011
Chesapeake	6.5%
Franklin	11.3%
Gloucester	5.9%
Hampton	8.4%
Isle of Wight	6.5%
James City	5.3%
Newport News	7.8%
Norfolk	8.4%
Poquoson	5.4%
Portsmouth	8.7%
Southampton	8.6%
Suffolk	7.1%
Surry	7.8%
Virginia Beach	6.0%
Williamsburg	14.0%
York	5.4%

Source: Virginia Employment Commission

Figure 7.7 Employment	
Locality	2011
Chesapeake	94,724
Franklin	4,094
Gloucester	9,406
Hampton	54,537
Isle of Wight	9,677
James City	26,373
Newport News	96,307
Norfolk	138,060
Poquoson	1,771
Portsmouth	43,284
Southampton	3,601
Suffolk	24,765
Surry	2,343
Virginia Beach	162,575
Williamsburg	13,382
York	21,321

Source: Virginia Employment Commission

Figure 7.8 Poverty Rate	
Locality	2011
Chesapeake	91
Franklin	212
Gloucester	101
Hampton	147
Isle of Wight	110
James City	72
Newport News	148
Norfolk	175
Poquoson	51
Portsmouth	173
Southampton	198
Suffolk	119
Surry	127
Virginia Beach	87
Williamsburg	138
York	54

Source: U.S. Census Bureau

Figure 7.9 Fair Market Value of Real Estate Per Capita	
Locality	2010
Chesapeake	$23,306.1
Franklin	$636.5
Gloucester	$4,323.0
Hampton	$11,455.7
Isle of Wight	$4,683.7
James City	$11,320.4
Newport News	$14,980.7
Norfolk	$18,474.7
Poquoson	$1,711.3
Portsmouth	$7,227.0
Southampton	$1,620.0
Suffolk	$9,685.2
Surry	$872.0
Virginia Beach	$52,349.9
Williamsburg	$1,827.5
York	$9,020.3

Source: Virginia Auditor of Puclic Accountrs
Weldon Cooper Center

Figure 7.10 Retail Sales Per Capita	
Locality	2011
Chesapeake	$12,957
Franklin	$17,169
Gloucester	$9,130
Hampton	$9,400
Isle of Wight	$5,772
James City	$12,172
Newport News	$10,453
Norfolk	$10,614
Poquoson	$3,576
Portsmouth	$6,052
Southampton	$2,423
Suffolk	$7,833
Surry	$5,007
Virginia Beach	$10,739
Williamsburg	$23,935
York	$13,153

Source: Virginia Department of Taxation,
Weldon Cooper Center