

2001 POTOMAC INDEX

**Measuring
Progress
in the
Greater
Washington
Region**





Dear Reader:

We are pleased to present the *2001 Potomac Index*, a joint project of the Potomac Conference and a research team led by the Brookings Greater Washington Research Program. The Potomac Conference designed the *Index* both as a descriptive tool to help citizens and leaders of the Greater Washington Region understand how the region is changing and as a set of measurements outlining the region's progress on key economic and social issues.

The *Index* focuses on the following five strategic commitments that the leaders participating in the Potomac Conference have adopted as priority goals for the region:

- **innovation and entrepreneurship**
- **inclusion and participation**
- **education and lifelong learning**
- **quality of life**
- **regional thinking and action**

The *2001 Potomac Index* continues the work of the *2000 Index* and builds on the latter's strong foundation, retaining the five strategic commitments as a framework for charting the Greater Washington Region's progress but refining the measurements and adding new indicators in order to take an even broader inventory of the issues affecting the region.

Several, but not all, of the indicators reflect the events of September 11 and their impact on the region. Most of the indicators in the *Index* are based on annual data, and comparative figures concerning the last three and a half months of 2001 are not yet widely available. Even so, whenever possible, the text does incorporate information related to the terrorist attacks' economic and social aftermath in the Greater Washington Region.

The region – and indeed, the entire nation – suffered a horrific shock on September 11, but our belief remains unwavering that the region is fundamentally strong and healthy. As the *Index* shows, the Washington region has a resilient entrepreneurial and productive economy cushioned against economic downturns by the federal sector, a highly educated populace, and a range of vigorous educational, philanthropic, and nonprofit activity. In addition, the *Index* identifies certain challenges confronting the region. Thus, citizens and leaders alike should find the publication useful for creating a dialogue about how the region can maintain and build on its considerable assets and at the same time effectively address the challenges that lie ahead.

Sincerely,

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The Brookings Greater Washington Research Program welcomes the opportunity to work with the Potomac Conference on the second Potomac Index. We fully support the Potomac Conference’s goal of convening private, public and nonprofit sector leaders to address regional issues. We see the Index as a chance to bring together the region’s leading researchers to help define the area’s progress and challenges. We were fortunate in being able to assemble a knowledgeable and talented team to work with us on the Index, and we are deeply indebted to them for their hard work and many contributions. (Please see the research team listed on the back cover.) We also especially appreciate the efforts of Martha Ross of Brookings Greater Washington, who worked tirelessly as a project coordinator, researcher and editor.

Alice M. Rivlin and
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COVER PHOTO:
A River Runs Through It: Teamwork on the Potomac

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GREATER WASHINGTON REGION

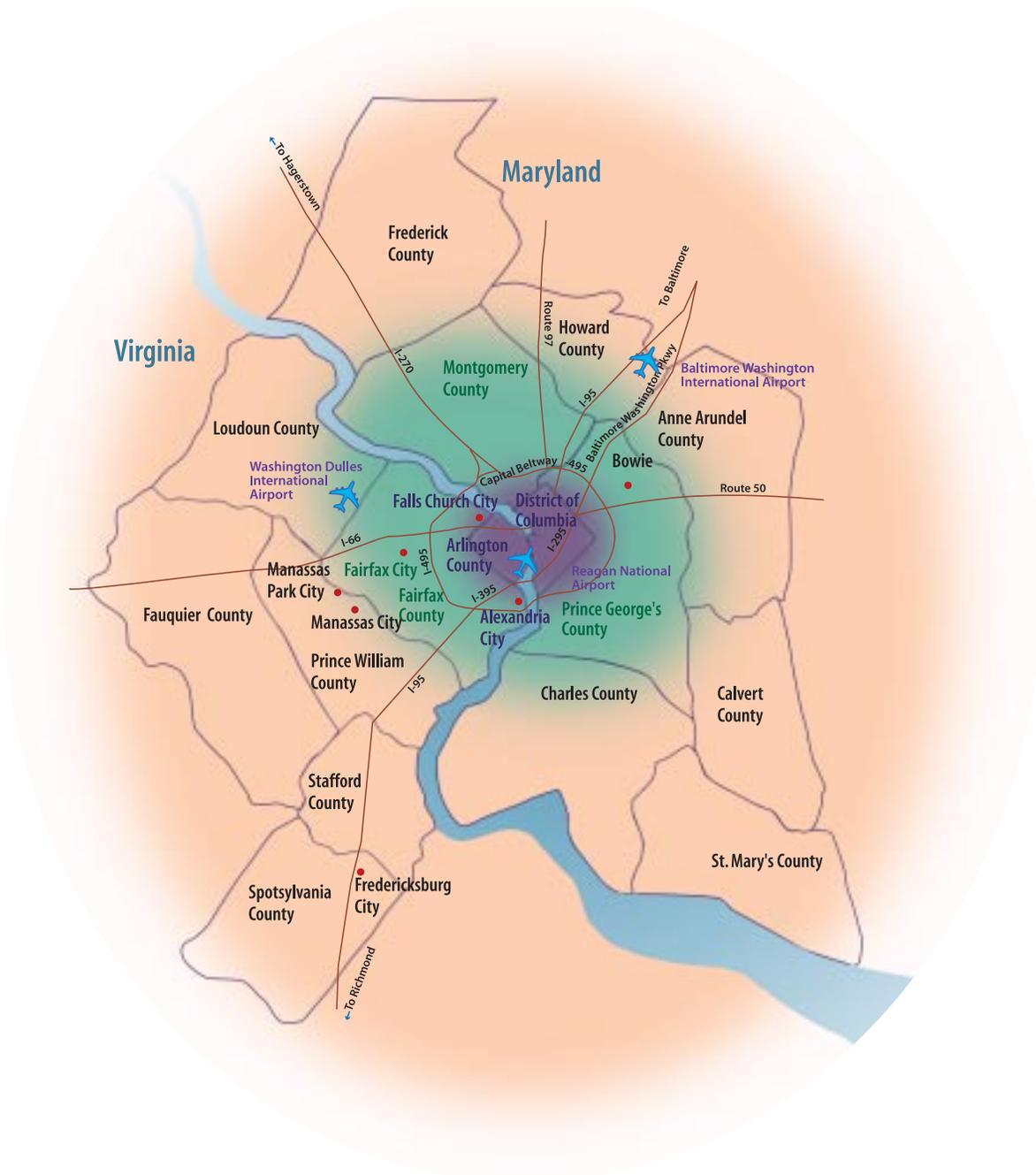
Total Area: 5,000 square miles
 Composition: Three jurisdictions (District of Columbia, Maryland, and Virginia)
 Total population: 5.5 million
 Total employment: 3,160,000 private-sector and 749,000 public-sector

The Potomac Index is based upon a definition of the Greater Washington Region which reflects Greater Washington Initiative member jurisdictions and differs somewhat from traditional government definitions of the Washington metropolitan area. The Greater Washington Initiative is the regional marketing affiliate of The Greater Washington Board of Trade.

- OUTER RING**
- MIDDLE RING**
- INNER RING**

Geographic Rings: For the purposes of this *Index*, the region is grouped into three geographic rings – inner, middle and outer.

See page 36 for a list of jurisdictions by geographic ring.



ECONOMIC HIGHLIGHTS

- From 1992 to 2000, private-sector employment increased 27 percent; total government employment decreased 11 percent. In 1991, one in six workers was a federal employee, compared to one in eight in 2000.
- The service sector is the largest industry with 1,126,700 employees. Retail trade is next with 410,400 employees, and the federal government is the third-largest employer with 333,100 employees.
- Services is one of the fastest growing sectors, employing 350,900 more workers since 1991, a 45 percent increase.
- In 2000, 69 percent of the region's technology-intensive employment was in service areas such as software development and systems integration, 17 percent was in bioscience and research/testing, 10 percent was in tech-intensive manufacturing, and 4 percent was in aerospace.
- Average wages in 2000 were \$43,191 for the private-sector and \$67,453 for federal, state and local government employees. From 1992 to 2000, both private-sector wages and government wages increased 17 percent.
- The federal government paid the highest average wages in 2000, at \$86,408, followed by wholesale trade at \$66,528.

A FEW NOTES ABOUT DATA

Some caveats are in order before discussing all of these findings in detail. First, despite every attempt to obtain the most recent annual data, there nonetheless exists an unavoidable time lag before data become available. Thus, the most recent annual data for most indicators are for 2000 and do not reflect certain key 2001 events - namely, the national recession, the weakening of the technology sector, and the terrorist attacks of September 11. Newer data are incorporated into the text when possible in order to discuss the impact of these events. For example, two household surveys were conducted for the *2001 Potomac Index*. The first was in August 2001. Following

DEMOGRAPHIC HIGHLIGHTS

- The population increased from 4.7 million in 1990 to 5.5 million in 2000, representing a 17 percent increase in total population.
- In 2000, the total population was composed of 58 percent whites, 25 percent blacks, 8 percent Hispanics, 7 percent Asian and Pacific Islanders and 3 percent two or more races.
- The two fastest-growing ethnic/racial groups are Asian/Pacific Islander and Hispanics. From 1990 to 2000, the Hispanic and Asian/Pacific Islander populations grew at an average annual rate of approximately 8 percent. Both segments constituted 15 percent of total population in 2000.



the events of September 11, many of the questions were updated and new subject matter was added in a November follow-up survey. Both surveys are referred to in the text.

Second, the ability to gauge the region's progress against the 2000 *Index* is limited because of the modifications the report has undergone. The changes to the indicators mean that a comparison with the previous *Index* is not always possible. Even so, the revised indicators still allow an examination of the region's progress, because whenever possible the data are presented for multiple points in time.

Third, available data do not always conform exactly to the geographic definition for the region set by the Potomac Conference. *The Potomac Index* is based on a definition of the Greater Washington Region that reflects Greater Washington Initiative member jurisdictions and differs somewhat from traditional government definitions of the Washington metropolitan area. The appendix lists the sources for the report and specifies the geographic area covered by the data for each indicator.

OVERVIEW

The goal for the Potomac Index is to provide a clear-eyed view of the Greater Washington Region's assets and challenges. By charting the region's performance on key economic and social indicators, the Index will assist the Potomac Conference in its work of realizing its vision for the region: "The Vision foresees the region as having an outstanding quality of life and a prosperous economy with a strong, safe, vibrant core surrounded by strong core communities that provide excellent opportunities and choices for all who live and work in the region. Further, the region should become a cooperative, inter-jurisdictional community supporting economic benefits for all levels of society and a region that capitalizes on the strengths of its diversity."

This *2001 Potomac Index* tracks the Washington area's progress since the inaugural report in 2000 and examines some new measures of the region's health. In short, this report finds that:

THE WASHINGTON REGION IS STRONG, HEALTHY AND GROWING...

The private-sector continues to diversify and add a remarkable number of jobs. The private-sector grew steadily during the 1990s, adding 668,000 jobs to the economy of the Greater Washington Region between 1992-2000. Service sector jobs in the region continue to command higher salaries than the national average, indicating high levels of productivity. In 2000, the average service sector salary in the region was 26 percent higher than the national average. The region's transition to a more private-sector oriented economy means the region has been able to benefit from the new economy boom of the last decade.

Federal government spending continues to fuel the region's economic growth. Federal procurement of professional and technology services in the region, as well as federal contracting of research and development services, increased during the 1990s, spurring dramatic growth in information and technology companies. With federal spending projected to grow as a result of the war on terrorism, the federal sector's role is likely to become more prominent in the regional economy and to provide a cushion against the effects of the national recession.

Innovation is fueled by a diversified high-technology sector, federal research spending and a strong university sector. Venture capital investment skyrocketed in the mid-1990s and reached record highs in 2000, and federal research and development contracting has also poured billions of dollars into the region through the 1990s. The number of fast-growth "gazelle" companies, those that derive a majority of their sales revenue from new products and services, fell in 2000 but remains higher than in the early 1990s. Private-sector patents have also risen dramatically since the early 1990s.

Residents, foundations and businesses all actively donate time and money to nonprofit organizations in the region. Donations from individuals totaled approximately \$4.8 billion in 1999, with residents contributing an estimated 3.4 percent of their adjusted gross income to charity, compared with the national rate of 2.8 percent. Donations from foundations based in the region more than doubled between 1992 and 1999, increasing from almost \$250 million to more than \$530 million. Donations from the top twenty-five corporate donors almost doubled since 1997, from \$54 million to \$94 million in 2000.

Household incomes have risen at all income levels and for all racial and ethnic groups. The gap between high-and low-income groups has diminished slightly, and the wide income gap between whites and African-Americans has begun to narrow. The region's median income in 1999 was \$68,000, up from \$43,000 in 1990.

The region has an increasingly highly educated population and a strong university sector. Adults older than 25 with at least a bachelor's degree increased from 36 percent in 1991 to 42 percent in 2000, a percent far in excess of the 26 percent national rate in 2000. The region has a strong higher-education infrastructure: approximately 260,000 students were enrolled in the region's 28 major four-year colleges, community colleges or graduate programs in the 1999 school year. One of every dozen adults older than 25 in the region is actively pursuing post-secondary education.

YET INCLUSION MUST BE BROADENED AND QUALITY OF LIFE IMPROVED.

Low-income residents face a shortage of affordable housing.

In 1998, there were twice as many households (176,809) with annual incomes below \$16,000 as there were affordable housing units (87,826). The vast majority of low-income residents face a serious cost burden in paying for housing.

The region's air quality failed to meet federal standards throughout the 1990s. Compliance with federal standards is important on two counts. First, high ozone levels cause a variety of health and respiratory problems. Second, if the region does not meet federal standards by 2005, transportation planners will need to offset any "excess" emissions above the limit by adopting measures to reduce car use, or else jeopardize federal transportation funding.

The Anacostia River is in poor condition. Sewage and other pollutants have reduced oxygen levels in the water, seriously compromising the river's ability to support aquatic life. Although oxygen levels have increased during the past decade, they still frequently fall below levels considered healthy.

The region's highways are some of the most congested in the country. Residents experienced an annual delay of 46 hours because of traffic congestion in 1999, up from 41 hours in 1994. Two-thirds of the residents in the region say that traffic congestion has an impact on the quality of their life, with 30 percent saying it has a "serious" impact and another 35 percent saying it has "somewhat" of an impact.

Despite the region's diversity, many people live in largely homogenous neighborhoods. The residential separation of blacks from whites, although somewhat less pronounced than during the early 1990s, remains substantial. The residential separation between whites and Hispanics as well as between whites and Asians has been much less marked than the separation between whites and blacks, but is nonetheless intensifying as the Hispanic and Asian presence in the region grows.

Although there have been recent improvements, income inequality continues. Income gains in the 1990s were not distributed equally. In 1999, the top 20 percent of households in the region enjoyed incomes of \$115,259 and higher, up 68 percent since 1990, while the bottom 20 percent had incomes below \$30,790, up only 40 percent from the 1990 level. Median incomes for nonwhite households remain lower than for white households.

REGIONAL LEADERSHIP IS A CONTINUING CHALLENGE.

The regional decision-making capacity to address the challenges outlined above needs strengthening. The federal government is a dominant presence in the region and is often concerned about national and international issues at the expense of local issues. In addition, the District of Columbia is a federal district without a state government or full state powers. The suburbs are divided up between two strong states, Maryland and Virginia, that often do not agree on either the area's problems or the solutions to them.

Nonetheless, a strong base clearly exists for enhancing efforts to think and act regionally. Citizens are interested in greater regional collaboration and there are already numerous examples of such efforts. Indeed, the Potomac Conference is one initiative to bring the public, private and nonprofit sectors together to address regional concerns. And the events of September 11 spurred unprecedented action to bring greater coordination and communication among the local, state and federal agencies and organizations in the region.

Innovation and Entrepreneurship

Vision:

“Develop an economy that builds on the inherent strengths of the region’s assets and enhances the opportunities for entrepreneurship and innovation in order to ensure continuing growth and prosperity.”

The Greater Washington Region’s inherent economic strengths lie in the link between the region’s national-capital functions and its private-sector. The interdependencies of the regional economy’s core industries — government, technology, international business, hospitality, and construction — have protected the economy from the full force of cyclical downturns in the past and will continue to do so. This synergy among the area’s core industries provides a relatively stable market and one conducive to innovation and entrepreneurship. Along with the national economy, the region’s economy has slowed since mid-2000, but at a much more moderate rate.

Federal spending on technology services has attracted new firms to the region and has helped to build a productive capacity that now markets new technology-based and knowledge-based services to the global market. Federal research and development spending has underwritten the innovation process, transforming ideas into applications and products. Federal research and development spending, while dominated by defense systems, also comprises expenditures on a broad mix of medical, space, transportation, agricultural, educational, and general scientific technologies. Federal purchases of technology and professional services have emphasized information technology, telecommunications and computational services, and a broad range of technology-based services and have contributed to building a diversified private-sector.

As the region has become increasingly attractive to venture capital, new businesses have emerged, the success of which is demonstrated by their rapid revenue growth. The private-sector expands by adding new firms and growing existing businesses and by creating an increasing share of high-value-added jobs relative to competing economies.

The expansion of federal procurement spending following the September 11 attacks will have important immediate impacts on the region’s economy, with job and income growth disproportionately favoring technology-intensive services and firms located in Northern Virginia, where such services have become increasingly concentrated during the past decade. In the long term, increased federal spending may reinforce the Greater Washington Region’s overall technology advantage.

Despite this increase in federal spending, however, the regional economy nevertheless experienced immediate and possibly long-term damage as a result of these horrific events. In the short term, the hospitality industry was crippled, with a substantial immediate cost in lost jobs and income. Still, the bigger economic threat is the damage that has been done to Washington’s image as a good place to visit and in which to live and conduct business.

Repairing the region’s image and convincing the world that Washington is a safe place to visit and in which to invest will be critical to the recovery of the hospitality industry, the continued growth of the region’s private-sector, and the latter’s position as a center of innovation and entrepreneurship in an increasingly competitive world economy.

1. Public – Private Sector Job Mix

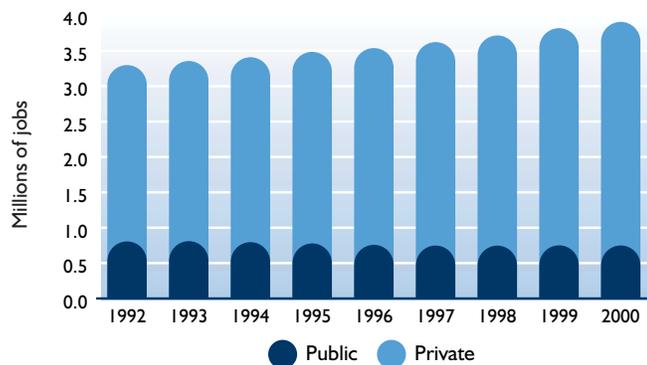
The mix of jobs between the governmental sector and the private-sector affects whether the region's economy will be driven by changes in government programs and service requirements or by market forces. A government-dominated economy tends to be more stable; in contrast, an economy dominated by the private-sector grows faster during periods of economic expansion but contracts faster during economic downturns. The regional economy's stability and its potential for innovation and growth depend on finding the appropriate balance between public and private-sector jobs.

A Shift of Jobs to the Private-Sector Speeds Regional Growth at Decade's End

Between 1992 and 2000, the percentage of public-sector jobs in the Greater Washington Region declined from 24.4 percent of total jobs to 19.2 percent, or a decrease of 57,000 jobs. Meanwhile, the private-sector added 668,000 jobs during this same eight-year period, with a large part of this increase stemming from federal spending. Between 1993 and 2000, federal procurement increased by about \$13 billion, accounting for an estimated 110,600 new private-sector jobs, or 24 percent of the total job increases in the private-sector in that seven-year period.

The continuing shift of jobs to the private-sector has enabled the economy to benefit from the private-sector's accelerating growth at the end of the decade. This advantage, however, may become a disadvantage during the current national recession.

Percentage of Public and Private Sector Jobs in the Greater Washington Region, 1992-2000

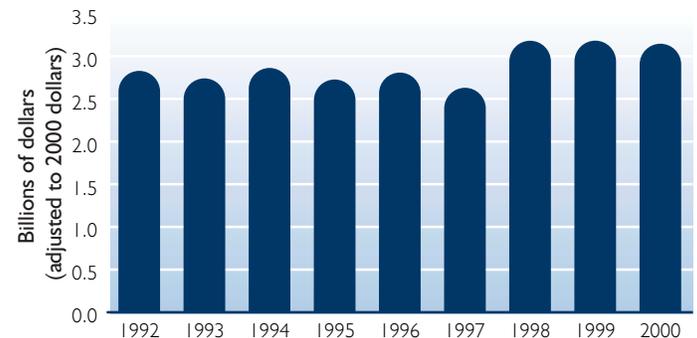


Source: U.S. Department of Commerce, Bureau of Economic Analysis

2. Federal R&D (Research and Development) Contracting

Spending for research and development (R&D) supports the growth of innovative firms and firms that employ new technologies, underwriting the transformation of ideas into processes and products. The federal government is the primary source of R&D outlays in the Greater Washington Region. These federally funded research activities cut across all sectors of the economy, and as a result the region has attracted a research-oriented workforce and has built a research capacity that gives it a comparative advantage over other regions.

Federal Research and Development Contracting in the Greater Washington Region, 1992-2000



Source: General Services Administration (GSA), Federal Procurement Data Center

Federal Research and Development Outlays Increase Sharply in Late 1990s

Federal contract awards for R&D remained relatively steady from 1992 to 1996 and dropped 6 percent in 1997 due to a one-year decrease in defense system and space R&D awards to area firms. Between 1997 and 1999, federal R&D contracting increased 21 percent to \$3.2 billion but again decreased slightly to \$3.15 billion in 2000. These contracts were received by for-profit and not-for-profit organizations located within the Greater Washington Region, including universities and hospitals. Federal research and development has embraced a broad range of research areas, including defense systems, space, and medicine. This spending provides opportunities to convert government-sponsored research into products and services marketable to the private-sector.

3. Patents

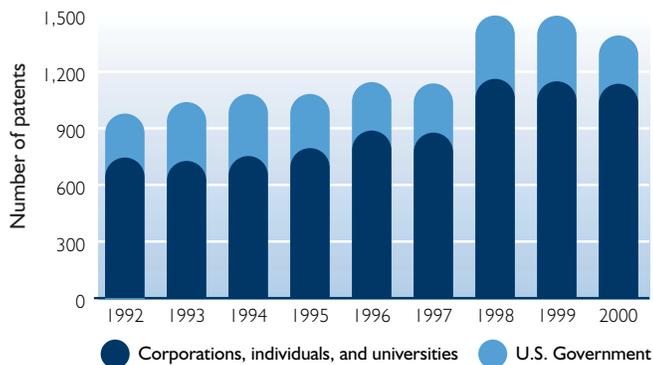
Patents reflect the initial discovery and registration of innovative concepts. Strong patent activity usually reflects significant research activity in a given area. A key motivator for obtaining patent protection is the potential marketability of any products or processes deriving from that innovative concept. Patent activity often heralds important discoveries that can lead to further innovations with market impact.

Private-Sector Increasingly Generates Patents

The total number of patents issued in the Greater Washington Region decreased by 7 percent in 2000. This decline, the first significant drop since 1992, is attributable largely to a 26.4 percent decline in patent activity associated with the federal government. Patents generated by corporations, individuals, and universities declined by only 1.1 percent in 2000, and the share of patents accounted for by the private-sector increased to 80 percent, up from the 70 percent or 75 percent recorded in past years.

Since 1992, the number of patents generated by the private-sector has grown by 52.5 percent, while the number generated by the federal government has grown by only 9.9 percent. This increasing dominance of the private sector in the region's patent output underscores the private sector's growing importance as a source of innovation.

Patents Issued in the Greater Washington Region, 1992-2000



Source: U.S. Patent and Trademark Office

NOTE: The increase in 1998 may be due to changes made in 1995 to General Agreement on Tariff and Trade regulations defining patents. These changes resulted in a surge of patent applications in 1996 and 1997, which begin to appear as patent approvals in 1998.

4. Venture Capital Investment

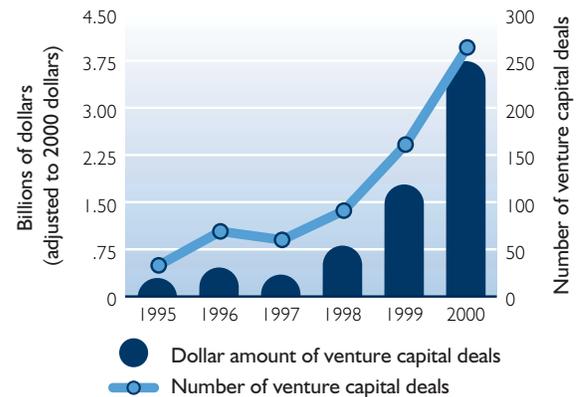
Venture capital investment is a bottom-line indicator of market-driven investment in entrepreneurial ventures with high-growth expectations. Typically, only firms with potential for exceptionally high rates of growth over a five to ten year period will attract venture capital.

Venture Capital Investment Doubles in 2000

The value of venture capital investment in the Greater Washington Region more than doubled in 2000 to a total of \$3.7 billion involving 264 deals, up from about \$1.75 billion and 161 deals in 1999.

This increase extended the pattern of year-to-year doubling in value to a third year. The value of venture capital investments in the Greater Washington Region in 2000 was almost 13 times greater than in 1995, and the number of deals was eight times greater.

Dollar Amount and Number of Venture Capital Deals in the Greater Washington Region, 1995-2000



Source: PricewaterhouseCoopers Money Tree Survey in Partnership with Venture One

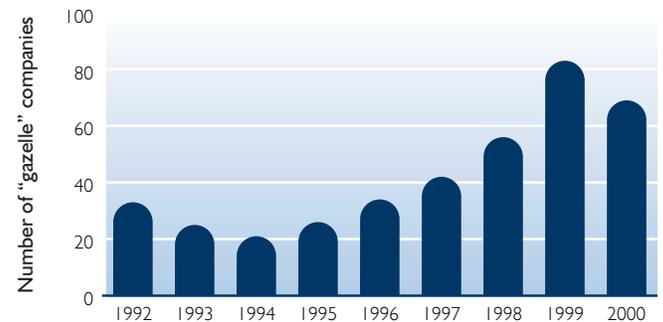
5. Fast-Growth “Gazelle” Companies

Fast-growth “gazelle” companies, which derive a majority of their sales revenue from new products and services, are typically highly innovative. Specifically, gazelle companies are ones that increase their sales at an average annual compound rate of 20 percent or more over four consecutive years. Often associated with significant job creation and outputs, these growth-oriented companies have dynamic work environments that become training grounds for entrepreneurs.

Gazelle Companies Decline in Number in 2000 but Are Still Historically High

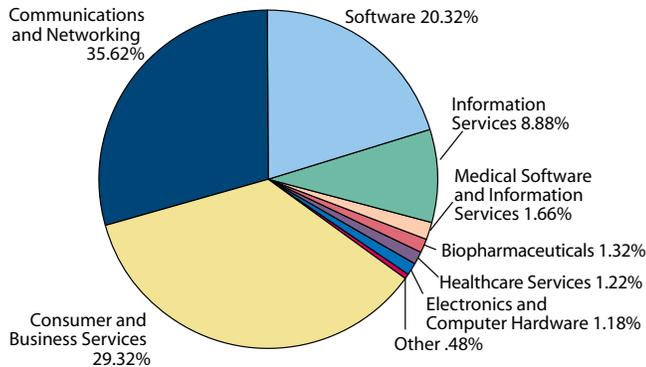
The number of publicly traded gazelle companies declined 17 percent to 69 firms in 2000 from the peak level of 83 such firms in 1999. Still, the 69 gazelle companies in 2000 were 109 percent greater in number than those in 1992. The lower number of gazelles in 2000 points to the economy’s transition from a period of rapid expansion to one of more moderate growth.

Number of Publicly Traded “Gazelle” Companies in the Greater Washington Region, 1992-2000



Source: Standard and Poors

Distribution of Venture Capital Investment Dollars in the Greater Washington Region, 2000



Source: PricewaterhouseCoopers Money Tree Survey in Partnership with Venture One.

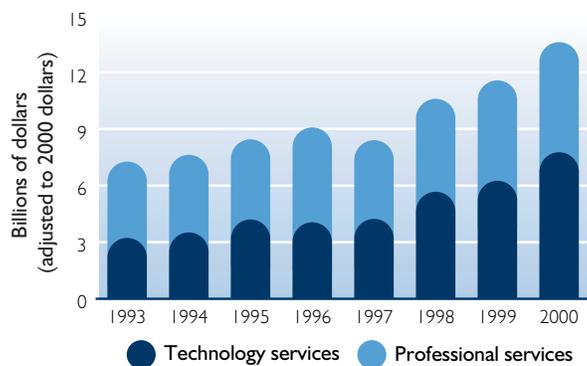
Venture capital investment in 2000 reflected a more diversified mix than in 1999, with a decreasing share going to information technology, communications, and software services (from 78 percent to 66 percent of the total dollar amount invested).

Initial data for 2001 indicate that venture capital investments have declined from the record-breaking levels of 2000. Although the attacks of September 11 intensified the climate of economic uncertainty, the decline had already started before the attacks because of a downturn in the technology sector and the weakening of the national economy.

6. Federal Procurement of Technology and Professional Services

Much of the strength of the Greater Washington Region's economy has come from the growth of its knowledge workers who support the region's core industries. The federal government is a major source of high-value-added job growth in the region through its procurement of technology and professional services. This procurement has helped to establish the region as one of the nation's primary centers of information technology and technology-intensive professional services and has provided the region with a strong economic base for future private-sector growth.

Federal Procurement Spending for Technology and Professional Services in the Greater Washington Region, 1993-2000



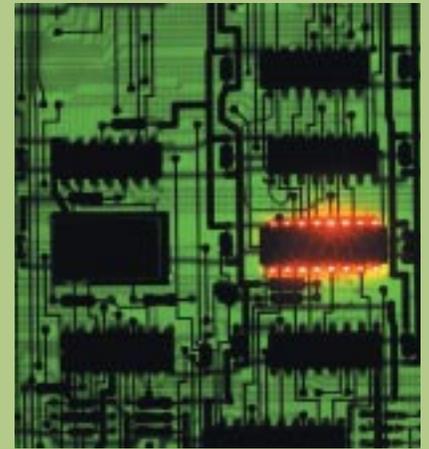
Source: General Services Administration (GSA), Federal Procurement Data Center

Federal Procurement Continues to Fuel Growth of Technology and Services

Federal procurement spending on technology and professional services from firms located in the Greater Washington Region totaled \$13.6 billion in fiscal year 2000, up from \$11.6 billion in 1999, an annual gain of 17.5 percent and an increase of 87 percent since 1992. Technology purchases have been especially important, growing 141 percent from \$3.2 billion in 1992 to \$7.8 billion in 1999. This disproportionate gain in procurement of technology services reflects the region's maturation as one of the nation's major centers of technology and of technology-intensive professional services.

7. Service Sector Productivity Advantage

Advanced economies are characterized by high-value-added and high-productivity jobs that support above-average levels of personal earnings. In the "new" economy, the largest sources of jobs with above-average incomes have been in the increasingly technology-intensive business services

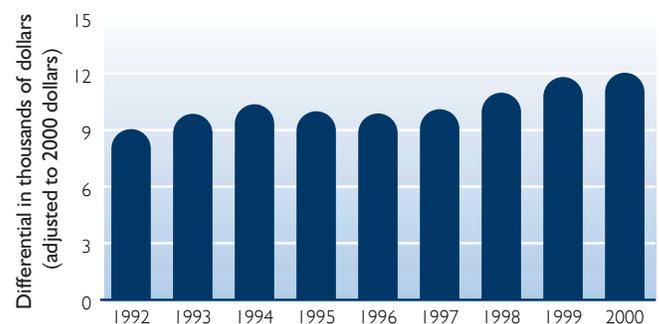


sector and the engineering services and management services sub-sectors. An economy having higher average incomes in the service sector will be an economy able to support faster growth and a higher future standard of living.

Higher Earnings Reflect Region's Value-Added Advantage

In 2000, the average salary for a service sector job in the Greater Washington Region was \$45,065 — or \$12,038 greater than the national average of \$33,027. From 1992 to 2000, the difference between the regional average and the national average grew by 33 percent, showing that the region has continued to enjoy productivity and value-added advantages relative to the national economy. These higher earnings in the regional service sector result from the higher-paying jobs in growing technology-intensive business activities, a highly educated workforce, and an economic environment favorable to entrepreneurial activity.

Difference between Service Sector Salaries in the Greater Washington Region and in the United States, 1992-2000



Source: U.S. Department of Commerce, Bureau of Economic Analysis

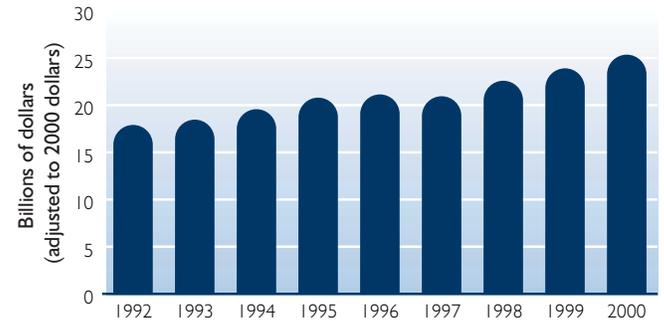
8. Spending by Nonprofits

The nonprofit sector is a major component of the region's economy, with expenditures accounting for approximately 10 percent of the gross regional product. Besides supporting jobs and generating personal income, the expenditures of the nonprofit sector reflect a commitment by the region's nongovernmental organizations to addressing the social, cultural, educational, health, and safety needs of the region's residents.

Nonprofit Spending Increases

Expenditures by the nonprofit sector totaled \$25.4 billion in 2000, up 6 percent from 1999. These expenditures have grown during the past eight years, increasing each year except in 1997. Since 1992, they have increased by 41.6 percent. In 2000, health and education programs accounted for 21 percent and 19 percent of these expenditures respectively, and arts and culture, human services, and science and technology services accounted for approximately 8.5 percent each. The remaining 35 percent is distributed across a wide range of other service areas. Nonprofit organizations located in the District of Columbia accounted for 56 percent of these expenditures, while those in Northern Virginia and Suburban Maryland accounted for 24 percent and 20 percent, respectively.

Spending by Nonprofit Organizations in the Greater Washington Region, 1992-2000



Source: The Urban Institute, National Center for Charitable Statistics

Inclusion and Participation

Vision:

“Foster a climate in which people from all socio-economic groups and geographic communities can participate in the region’s well-being, because inclusion not only promotes greater equity but also expands opportunities for all residents to contribute to the region’s future.”

Economic security for families and individuals is crucial to the region’s long-term ability to foster inclusiveness and citizen participation. In recent years, **household incomes have risen substantially at all income levels**, the gap between high- and low-income groups has diminished slightly, and the wide income gap between whites and African-Americans has begun to narrow. Although the vast majority of the region’s households enjoy decent and affordable housing, **the region’s poorest families and individuals still face housing expenses they cannot meet.**

An important facet of economic security is whether people have the opportunities and resources to participate in the economic and social mainstream. During the 1990s, **rates of homeownership and Internet access both increased**, particularly among minorities, and rates of minority business ownership also rose.

The events of September 11 and their aftermath, however, have compounded the economic insecurity of many residents. In particular, workers in the travel-related and hospitality sectors, many of whom have low incomes, have suffered job losses.

Another aspect of inclusiveness is how the region adapts to its increasing diversity, one of its greatest strengths as well as one of its most difficult challenges. The region has historically been home to a large African-American community, and in recent years it has also attracted large and growing numbers of immigrants from all over the world. **In 1970, one out of 22 metro residents was foreign-born, a figure that climbed to one in six by 2000.** This growing racial and ethnic diversity clearly adds to the richness of life in the region and contributes to its overall vitality.

Within the framework of the Washington region’s growing diversity, however, many people still live in neighborhoods that are largely homogeneous in racial and ethnic terms. The residential separation of blacks from whites, although somewhat less pronounced than during the early 1990s, remains especially noteworthy. The separation of Hispanics and Asians from whites is not as clear-cut but appears to be on the increase. If minorities and whites continue to live in separate neighborhoods, their opportunities to interact as neighbors, friends, and schoolmates are limited, and opportunities are lost for creating greater racial and ethnic understanding, harmony, and equity.

An additional dimension of inclusiveness is civic engagement — the connections between individuals and the region’s community, social, and political structures. The majority of the region’s adult residents express their commitment to civic engagement by registering to vote (although voter turnout has fallen in recent years). Moreover, **approximately 70 percent of residents contribute either time or money to nonprofit and charitable organizations.** In fact, volunteering and charitable giving rates, already high, surged even higher after September 11.

9. HOUSEHOLD INCOME DISTRIBUTION

Household income provides a basic gauge of how individuals and families are faring economically. Measuring how the region's households are distributed – from the lowest to the highest income levels – provides information on median household income and identifies those at the upper and lower income levels. Information on the gap between those at the bottom of the income distribution – the 20th percentile – and those at the top – the 80th percentile – shows the extent of income inequality in the region. The dollar amounts shown reflect income for all members of the household and include wages, investments, social security, and welfare payments.

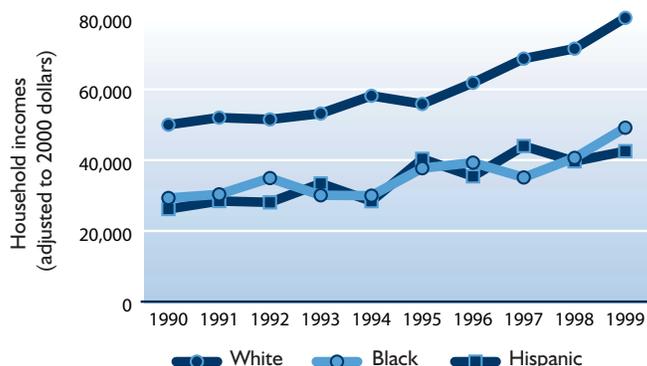
Incomes Increase at All Levels — Gap between High and Low Earners Narrowed Slightly in Late 1990s

Median Household Income

From 1990 to 1999 (the most recent year for which data are available), the median annual income for households in the Greater Washington Region rose steadily from \$43,198 to \$68,229 (adjusted to year 2000 dollars). Household incomes increased across all levels, including the bottom 20 percent of the distribution.

Nevertheless, households at upper income levels experienced greater income growth than did those at lower income levels. As of 1999, the top 20 percent of households in the region enjoyed incomes of \$115,259 and higher, up 68 percent since 1990, while the bottom 20 percent had incomes below \$30,790, up only 40 percent from the 1990 level. The income gap between the region's wealthiest 20 percent and its poorest 20 percent widened from a

Median Household Income by Race and Ethnicity in the Greater Washington Region, 1990-1999



Source: U.S. Census Bureau, Current Population Survey

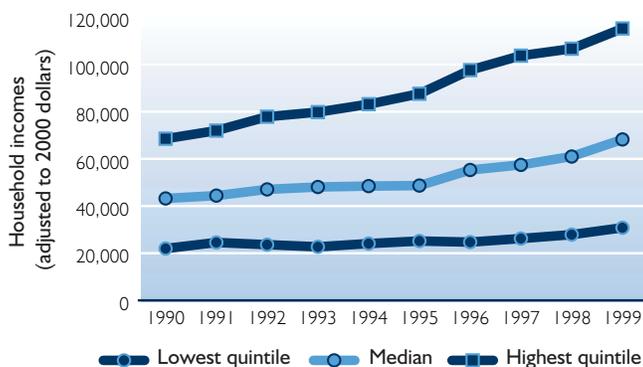
ratio of 3.1 to 1 in 1990 to a peak of 4.0 to 1 in 1997. In 1998 and 1999 this gap closed slightly, with the ratio now at 3.7 to 1.

Even with real growth in income since 1990 for all racial and ethnic groups, median incomes for nonwhite households remain lower than for white households. Over the decade, however, the gap between minority and white incomes narrowed slightly.

Receipt of the Earned Income Tax Credit

Another indicator of household income is the Earned Income Tax Credit (EITC), a refundable income tax credit designed to make work pay for low-income families. The EITC is available to families whose earnings range from below the federal poverty line to about double the poverty line (approximately \$29,000). According to an analysis by the Brookings Institution, in 1998 about 11 percent of taxpayers in the region, or almost 240,000 households, filed for the EITC. This figure is comparable to the percentage of EITC filers in metropolitan areas nationally. About 80 percent of EITC filers in the region live outside the District of Columbia, with many clustered in the close-in jurisdictions of Prince George's County, Arlington County, and Alexandria. (To see the full report, please go to www.brookings.edu/es/urban/eitc/abstract.htm.)

Household Income Distribution in the Greater Washington Region, 1990-1999



Source: U.S. Census Bureau, Current Population Survey

10. HOUSING AFFORDABILITY AND HOMEOWNERSHIP

The monthly rent or mortgage payment is typically the single biggest item in a household's budget, and the ability to afford decent housing is a critical indicator of economic security and well-being. Moreover, homeownership provides opportunities for families to build wealth and to have a long-term stake in their communities. High housing costs can constrain the choice of areas in which low- and moderate-income households can afford to live, limiting their ability to reside in locales with rapid job growth, high-quality schools, and neighborhood amenities.

Low-Income Residents Face Housing Shortage and High-Cost Burdens

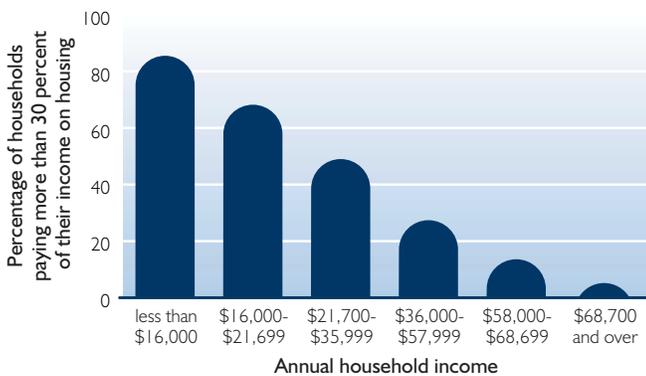
Housing Affordability and Availability

Across the region, incomes have grown faster than housing costs, and few middle- and upper-income households face difficulty in finding affordable housing. But finding affordable housing is a problem for many low-income households, both in terms of the supply of affordable housing units and the cost burden of paying for housing.

In 1998, there were twice as many households (176,809) with incomes below the poverty line (up to \$16,000 per year) as there were units that they could reasonably afford (87,826). A housing unit is considered affordable if it consumes no more than 30 percent of a household's monthly income. Residents with incomes up to about \$22,000 face a similar shortage (240,418 households but only 179,042 affordable housing units). Such shortages of low-cost housing are typical of metropolitan areas nationwide.

A majority of low-income residents face a cost burden in paying for housing. Eighty-five percent of households that earn less than \$16,000 per year and almost 70 percent of those earning less than \$22,000 per year devote more than a third of their income to housing.

Percentage of Households Paying More than 30 Percent of Their Earnings on Housing in the Greater Washington Region, by Income Group, 1998



Source: American Housing Survey, U.S. Census Bureau

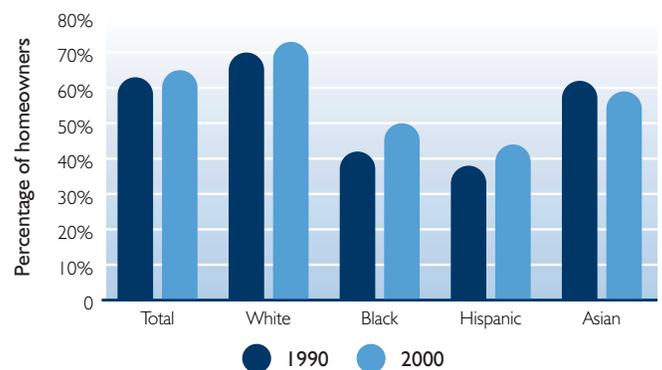
In addition, a major consideration in choosing housing is its proximity to employment. The *Potomac Index* household survey indicates significant subregional differences among residents regarding their satisfaction with the region based on whether they can find a good job near where they live. The vast majority of residents of Fairfax County (82 percent) rate the region highly on this measure, compared with 66 percent in Montgomery County, 57 percent in the District of Columbia and 51 percent in Prince George's County. Those with higher incomes also rate the region higher on the proximity of good jobs to where they live, as compared with those having annual incomes below \$50,000.

Homeownership

Total homeownership rates in the region rose slightly between 1990 and 2000, but African-Americans and Hispanics showed the biggest gains, with increases in homeownership of 8 and 6 percentage points, respectively. Growth in homeownership among whites was slower, although whites did start from a higher base rate. Among Asians, the rate of homeownership declined slightly. In 2000, the regional rates of total homeownership and homeownership among whites were roughly comparable to national figures. Rates among Asians and African-Americans surpassed the national average, while Hispanics lagged the national average by two percentage points.

As calculated by the National Association of Home Builders' Housing Opportunity Index, the share of homes affordable for purchase by median income households in the region increased during the 1990s, from 66 percent in 1992 to 77.5 percent in the first quarter of 2001. But within this picture, affordability did begin to decline somewhat in the late 1990s, following a high of 80 percent in 1998.

Homeownership Rates by Race and Ethnic Group in the Greater Washington Region, 1990 and 2000

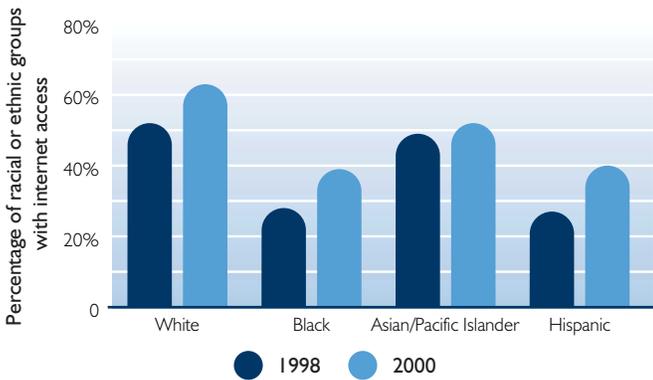


Source: U.S. Census Bureau, 1990 and 2000 Census

11. INTERNET ACCESS

As information and services become increasingly available on line, Internet access is becoming more critical for people's full participation in the economic and social mainstream. Those without Internet access are excluded from a range of activities — communication, information gathering, and private and governmental transactions — that others take for granted.

Internet Access at Home or Outside of Home, by Race or Ethnicity in the Greater Washington Region, 1998 and 2000



Source: U.S. Census Bureau, Current Population Survey, 2000 August and 1998 December Internet and Computer Use Supplement

Washington Residents Are Increasingly Connected to the Internet

More than half of Greater Washington Region residents (55 percent) had access to the Internet at home or outside the home in 2000, up from 45 percent in 1998. In both years, the regional rate surpassed the national rate by more than ten percentage points. Access has increased among all races and ethnicities in the region, with the biggest increases among African-Americans and Hispanics. In 1998, 53 percent of whites were connected to the Internet at home or away from home, as were 49 percent of Asians, 29 percent of African-Americans and 28 percent of Hispanics. By 2000, these figures had grown to 63 percent of whites, 53 percent of Asians, 40 percent of African-Americans and 40 percent of Hispanics.

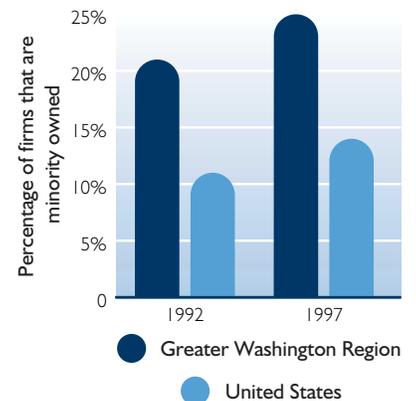
12. MINORITY BUSINESS OWNERSHIP

As the Greater Washington Region becomes increasingly diverse, the composition of private-sector business ownership and leadership provides an important indicator of inclusion. The number of minority-owned businesses is a measure of whether minorities have the opportunities and resources to participate in the economic mainstream. Minority-owned businesses are those owned by African-Americans, Hispanics, Asians and Pacific Islanders, or American Indians and Alaskan Natives.

Number of Minority-Owned Businesses Increases

The share of minority-owned businesses in the Washington region increased from 22 percent in 1992 to 25 percent in 1997. In both years, the regional rate far surpassed the national rate, which in 1992 was 11 percent and in 1997 was 15 percent. Rates of minority business ownership in the District of Columbia surpassed both the regional and national rates, with about one-third of businesses under minority ownership in both 1992 and 1997. In 1997, African-Americans accounted for the largest share — 49 percent — of minority-owned businesses. Next were Asians and Pacific Islanders, with about 31 percent of all minority-owned businesses; Hispanics, with about 20 percent; and American Indians and Alaskan Natives, with 1.6 percent.

Percentage of Minority-Owned Firms in the Greater Washington Region and in the United States, 1992 and 1997



Source: 1992 and 1997 Economic Census. 1997 data include all nonfarm businesses filing tax forms as sole proprietorships, partnerships, or any type of corporation. 1992 data include only subchapter S corporations in addition to partnerships and sole proprietorships.

13. RACIAL/ETHNIC DIVERSITY

The Greater Washington Region is a mosaic of individual neighborhoods and communities with varying characteristics and resources. People’s place of residence affects their ability to access the region’s assets and opportunities. When lower-income and minority households are included in all neighborhoods, their opportunities to benefit fully from the region’s resources are increased. The region becomes more socially and racially integrated, providing opportunities for economic and civic interaction.

Region Is Home to Immigrants from Around the World

According to a Brookings Institution report, between 1990 and 1998 nearly 250,000 legal immigrants from 193 countries and territories moved to the Greater Washington Region. In 1998, the region was the fifth most common destination for legal immigrants to the U.S. The nationalities of the immigrants who came to the Greater Washington Region in the 1990s are highly diverse: no one country of origin dominates among the newcomers. The largest immigrant group, from El Salvador, constitutes only 10.5 percent. Immigrants are dispersed throughout the region, with 87 percent living in suburban areas. *(To read the full report, please go to <http://www.brook.edu/es/urban/immigration/abstract.htm> .)*

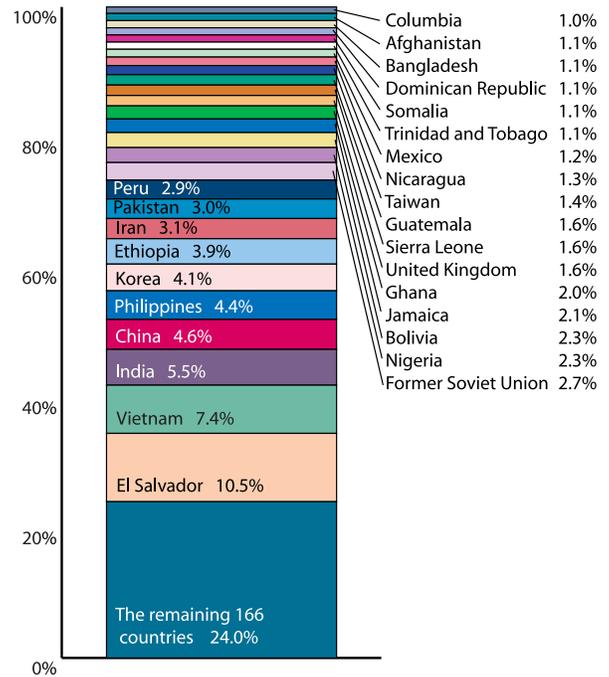
African-Americans and Whites Still Mostly Live Apart

The Greater Washington Region is indeed growing more and more diverse, but many people live in neighborhoods characterized more by racial homogeneity than by racial diversity. The average white resident of the metro area lives in a census tract that is 71 percent white, and the average black resident lives in a tract that is 59 percent black. In contrast, Hispanics and Asians are more likely to live in neighborhoods in which other racial and ethnic groups predominate.

During the 1990s, the residential separation of whites and blacks declined slightly but remained high as compared with other groups, according to the “dissimilarity index,” a standard measure used to show how evenly racial/ethnic groups are residentially distributed across a metropolitan area. In comparing the black and white populations, the index fell from 65.7 in 1990 to 63.1 percent in 2000, meaning that in 2000, 63 percent of blacks would need to move out of their neighborhood in order to achieve an “even” residential pattern, one in which every individual neighborhood reflects the overall racial/ethnic composition of the region. Residential separation between whites and Hispanics as well as between whites and Asians is less pronounced than the separation between whites and blacks but is nonetheless intensifying as the Hispanic and Asian presence in the region grows.

High concentrations of African-Americans live in the eastern section of the region, especially in parts of the District of Columbia and Prince George’s County, where a number of neighborhoods are more

Composition of New Immigrants to the Greater Washington Region by Country of Origin, 1990-1998



than 90 percent African-American. However, African-Americans also live, in lesser concentrations, throughout the region. The Asian and Hispanic populations are neither as widely dispersed throughout the region nor as densely concentrated in particular areas as African-Americans. There are only a few neighborhoods where Asians or Hispanics make up more than 50 percent of the population.

Asians are clustered mostly in the inner suburban jurisdictions of Arlington, Fairfax, and Montgomery counties, with some also in Prince George’s and Howard counties. Only a small proportion live in the District of Columbia. Hispanics are also clustered mostly in the inner jurisdictions, including the District of Columbia, with the highest concentrations in Alexandria, Arlington and Fairfax counties, and a corridor in Montgomery County extending into Prince George’s County.

To see maps showing the residential patterns of African-Americans, Hispanics and Asians in the region, please go to the Potomac Conference website, at www.potomacconference.org.

14. VOLUNTEERING AND PHILANTHROPIC GIVING

People who volunteer their time and who provide financial support to local organizations are making important investments in their communities and in the region. Their donations of time and money show that they are willing to contribute to making their communities better places to live. Their financial contributions are significant: individual donations are, both nationally and regionally, the largest source of philanthropic dollars.

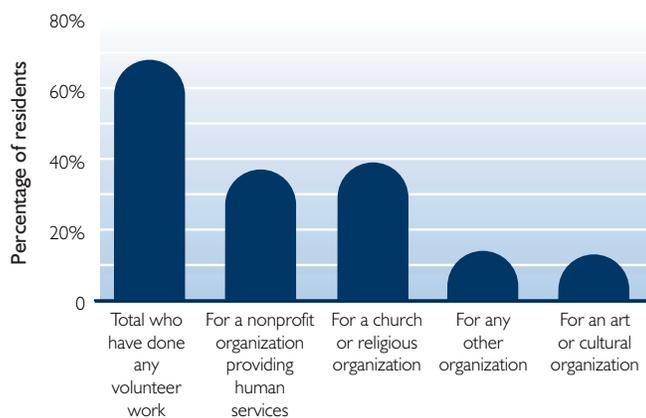
In addition to individual givers, foundation and corporations play a critical role in making investments in the region to improve the quality of life for all residents.

Individuals, Foundations and Corporations Actively Donate Time and Money

Volunteering

Sixty-nine percent of the region's residents have volunteered in the past year, exceeding the national rate of 44 percent as calculated by Independent Sector, a national coalition of nonprofit organizations. Washington area residents volunteer at a wide array of organizations. Volunteers for churches and religious organizations are the most active. Volunteering increases with higher educational attainment, with the notable exception of volunteers for churches and religious organizations, which draw equally upon people of all educational levels.

Percentage of Residents Who Have Volunteered in the Past Twelve Months in the Greater Washington Region, 2001



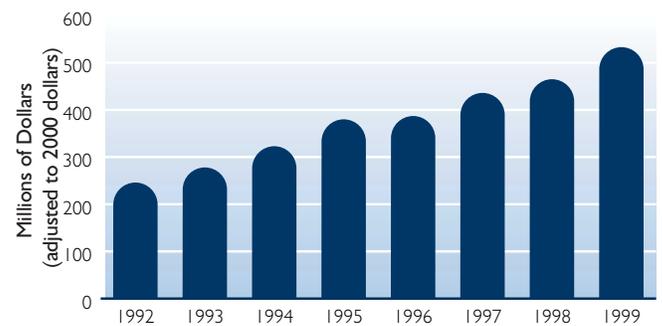
Source: Greater Washington Region Adult Population Survey, August 2001

Household Donations

A similarly high percentage of the region's households – 73 percent – made charitable donations to local organizations in the last year, compared with the national figure of 89 percent as calculated by Independent Sector. Again, they make donations to a variety of organizations, with 57 percent giving to human-services organizations, 39 percent giving to churches or religious organizations, 27 percent to educational institutions, and 16 percent to arts or cultural organizations. One-third of the region's residents make donations through combined-giving campaigns, such as the United Way or the Combined Federal Campaign. Although giving does increase with income, there is still a substantial level of giving at lower income levels: 58 percent of those who earn less than \$25,000 annually made a charitable contribution in the past year.

In 1999, according to calculations made by the Urban Institute for the Washington Regional Association of Grantmakers, individual donations from residents of the region totaled an estimated \$4.8 billion. Across the region, residents contributed an estimated 3.4 percent of their adjusted gross income to charity, surpassing the national rate of 2.8 percent. (To read the full report on regional philanthropic giving, please go to www.washingtongrantmakers.org.)

Total Charitable Giving by Foundations Based in the Greater Washington Region, 1992-1999



Source: Foundation Center

NOTE: Includes independent, operating, corporation and community foundations based in the Greater Washington Region, although giving is not limited to organizations in the area.

Foundation and Corporate Giving

Donations from independent, operating, corporate, and community foundations based in the region more than doubled between 1992 and 1999, increasing from almost \$250 million to more than \$530 million.

A survey conducted by the *Washington Business Journal* shows that total giving by the top twenty-five corporate donors in the region almost doubled since 1997, from \$54 million to \$94 million in 2000 (figures adjusted to 2000 dollars). This giving consists of donations through both corporate foundations and corporate giving programs.

Charitable Activity in the Wake of September 11

In response to the events of September 11, there was an immediate upsurge in volunteering and charitable giving. About 14,000 people registered as volunteers on the website of Greater DC Cares (the largest coordinator of volunteer services in the Washington region) in less than a week. Two-thirds of area residents donated to an emergency relief fund, and businesses and foundations donated an unprecedented \$55 million to projects and funds addressing the effects of the attacks.

The region's nonprofit and philanthropic sectors have expressed some concern that donations and volunteerism may focus on direct relief efforts, bypassing the thousands of nonprofits in the region and the services they offer, even as the need for safety-net programs may be increasing due to the downturn in the travel and tourism industries. In a December 2001 survey of its member organizations conducted by the Washington Council of Agencies, 28 percent reported an increased demand for services.

In the November *Potomac Index* household survey, nearly one-fifth of residents (19 percent) said they are giving more to charity compared with a "couple months ago," while only 6 percent are giving less because of concerns about the economy. However, it appears that the events of September 11 have prompted some to redirect their giving: about one in ten residents (11 percent) is changing his or her giving priorities.

Donations made through The Community Foundation of the National Capital Region are another indicator of how individuals are continuing to support their communities post-September 11. Giving through the foundation for the period of September, 2001 to January, 2002 increased 111 percent from the same period the previous year, from \$6.2 million to more than \$13 million. This did not include September 11-related giving, in which donors of the foundation added another \$4.9 million in gifts during the five month period. The experience of The Community Foundation suggests that individuals are continuing to give and to give more in the wake of September 11.

15. VOTER REGISTRATION

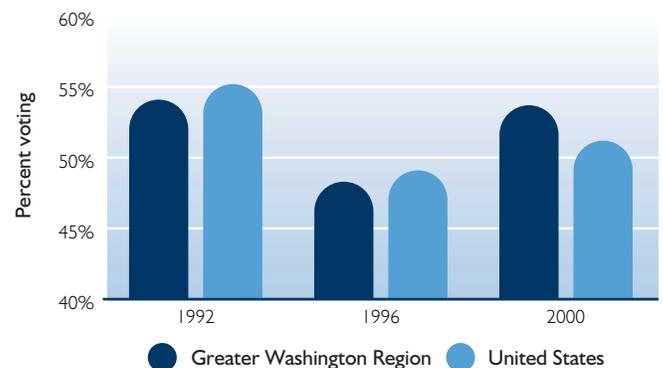
Voting is a fundamental measure of democratic participation. By voting, people engage in the political process, signaling their belief that their opinions matter in policymaking. Voter participation measures the percentage of the population 18 and older who cast votes in a given election — in this case the presidential elections of 1992, 1996 and 2000.

Voter Participation Improves, Surpassing the National Level

Voter participation in the 1992 and 2000 presidential elections reached almost 55 percent in the Greater Washington Region (although in 1996, voter participation was less than 48 percent). In the 2000 election, Virginia's Loudoun County and city of Falls Church and Maryland's Howard County had the highest turnout, ranging from 63 percent to 71 percent. The District of Columbia, Maryland's Prince George's County and Virginia's city of Manassas had the lowest rates, ranging from 37 percent to 47 percent.

In the August *Potomac Index* household survey, 84 percent of the region's residents responded that they are registered to vote. Registration rates increase with higher levels of education and income, as well as with the length of time people have lived in the region.

Percentage of the Voting Age Population of the Greater Washington Region and of the United States that Voted in 1992, 1996, and 2000



Source: Maryland State Board of Elections; Washington, D.C., Board of Elections and Ethics; Virginia State Board of Elections; the U.S. Census Bureau; and the U.S. Federal Election Commission

Vision:

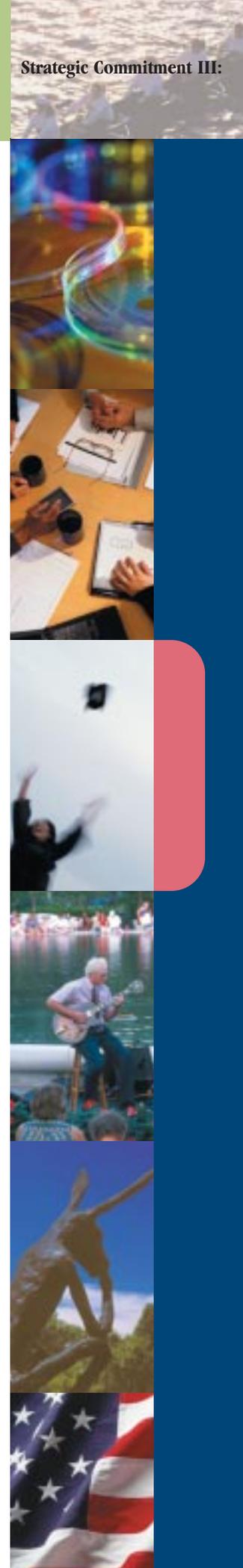
“Create a region that empowers all residents to become lifelong learners, because education and ongoing learning are necessary for access to opportunity in the New Economy.”

We do not live in a K-to-12 educational world any longer. Today, schooling beyond a high school degree is essential for attaining specialized skills, financial security and tools for lifelong learning. **As the economy has become more knowledge-based, individuals with higher levels of educational attainment have more career options** and are much more likely to gain employment that offers opportunities for advancement and higher earnings, while lower-skilled workers are placed at an increasing disadvantage. Similarly, regions with highly educated workforces are better able to attract and retain high-skill industries with the most potential for growth, such as information technology and professional services.

The Greater Washington Region has one of the most well-educated populations in the country: 42 percent of adults 25 and older have at least a bachelor’s degree.

We are second only to the Silicon Valley, CA region in educational attainment. Our region also has a strong higher-education infrastructure: about 260,000 students were enrolled in the region’s 28 major post-secondary institutions in the 1999 school year. Both enrollment and the number of post-secondary degrees awarded in the region increased in the 1990s. A third of area adults have been enrolled in a wide range of continuing education, job training or other post-secondary activities in the past year.

A strong K-to-12 educational system is also critical to the region’s well-being. Such a system attracts businesses and families to the area and is also a determining factor in positioning the region’s youth to continue their education, whether in the region with its wealth of post-secondary resources or elsewhere. **The regional high school dropout rate in the 1998–1999 school year was 3.6 percent, an improvement from the previous year’s 4.1 percent.** But dropout percentages do vary among jurisdictions: the District of Columbia’s rate is higher than rates in Suburban Maryland and Northern Virginia. The percentage of public high school seniors in Northern Virginia and Suburban Maryland who plan to continue their education remains steady, while the percentage is lower, but increasing in the District of Columbia. Meanwhile, the technological capacity of area schools is improving, as schools are lowering the ratio of the number of students per available instructional computer.



16. HIGH SCHOOL DROPOUT RATES

The high school dropout rate is a risk measurement of how many youth are leaving school without a degree, ill prepared to enter the job market. With a growing knowledge-based and technology-intensive economy, the region's quality jobs require a high school diploma at a minimum, if not a college degree. The region's school systems must provide the conditions necessary to foster this basic student achievement. Additionally, high-performing schools are a magnet for residents and families who want to ensure that their children receive a high-quality education. When schools are successful, the dropout rate declines within the region.

Dropout Rates in Northern Virginia and Suburban Maryland are Below the National Average; District of Columbia's Rate Is Higher

The use of federal rather than local data allows the calculation of a uniform dropout rate across the region, as Suburban Maryland, Northern Virginia and District of Columbia educational systems all calculate their dropout rates differently. The federal definition of a dropout is a nongraduating public school student in grades 9-12 who does not enroll the next year and has no extenuating reason for his or her departure.

In the 1998-1999 school year, the regional dropout rate was 3.6 percent, an improvement over the 1997-1998 rate of 4.1 percent. The regional rate is below the national rate, which in the 1997-1998 school year was estimated to be 5 percent. (More recent national data are not available.) Dropout rates do, however, vary among jurisdictions. About 1 in 8 District of Columbia high school pupils dropped out in the 1997-1998 school year and about 1 in 12 did so in 1998-1999, while the figure for suburban jurisdictions remained constant over the two years at about 1 in 30.

High School Dropout Rates in the Greater Washington Region, 1996-1999

	1996-1997	1997-1998	1998-1999
District of Columbia	—	12.8%	8.2%
Suburban Maryland	3.7%	3.2%	3.0%
Northern Virginia	3.8%	3.7%	3.9%
Greater Washington Region	—	4.1%	3.6%

Source: U.S. Department of Education, National Center for Education Statistics, Common Core of Data.

17. K-TO-12 TECHNOLOGY CAPACITY

For many of our youth, the foundation for technological literacy begins in our schools. To build this fundamental skill in each student, school districts need to give technology a central place throughout the school day in the lives of students and their teachers. School districts have to ensure that there is sufficient access to technology for every student and that the technology is not obsolete. The complexity and newness of technology's presence in the schools make it difficult to construct a single measure by which to assess student technological competency or the use of technology in schools. This year's measure, the number of students per available instructional computer in schools, will be reassessed in future years to determine if new data and measurements are available.

Northern Virginia Schools Lead in Providing Instructional Computers

The number of students for each instructional computer is a basic indicator of the ready availability of technology. This ratio of enrolled students to total number of computers available for instructional usage is a typical measure used nationally. But a students-to-computer ratio cannot assess the many other school-based factors involved in the integration of technology into all aspects of learning, such as the sophistication of the computers, the availability of software on the computers, the proportion of the computers connected to the Internet, and the frequency of their usage within classroom instruction or curricula.

Suburban Maryland and Northern Virginia have lowered the number of students per instructional high-end computer in the past two years. Data for only one year are available for the District of Columbia, making it impossible to show change over time. During the 2001-2002 school year, there were on average 5.2 students per instructional computer – including both high- and mid-capacity computers – in the District of Columbia.

A national survey by the National Center for Education Statistics (NCES) found that in 2000 the average ratio of students to instructional computers in public schools was 5 to 1, and the average ratio of students to instructional computers with Internet access was 7 to 1. According to the NCES, the 5 to 1 ratio is considered “a reasonable level for the effective use of computers within the schools.”

Number of Students per Instructional Computer in the Greater Washington Region, 1999-2001

	1999-2000	2000-2001	2001-2002
District of Columbia	—	—	5.2
Suburban Maryland	11	8.3	—
Northern Virginia	9.4	4.8	—

Source: District of Columbia Public Schools; Maryland State Department of Education; Virginia Department of Education.

NOTE: The District of Columbia and Suburban Maryland school districts tabulated both Internet-ready and Internet-connected computers. Northern Virginia school districts only counted Internet-connected computers. The District of Columbia tabulated both high- and mid-capacity computers, while Suburban Maryland and Northern Virginia tabulated only high-capacity computers. They all count computers within classrooms, libraries, labs, and media centers, collectively categorized as instructional computers.

18. POST-SECONDARY EDUCATIONAL ATTAINMENT

The educational attainment of the population represents the region's capacity to train and attract a highly educated workforce. Because many jobs and career paths require at least a college degree, information on residents' educational attainment levels shows how much of the workforce is likely to gain employment offering opportunities for advancement and earnings growth. Educational attainment also is an indicator of the state of the economy, since a highly skilled workforce is a draw for many industries.

Residents' Educational Levels, Already High, Continue to Rise

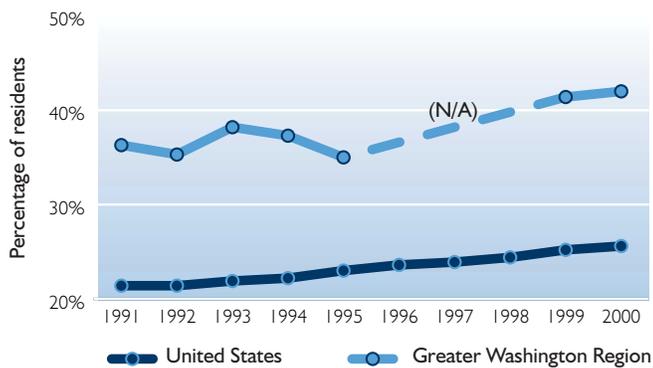
The Greater Washington Region has an extremely well-educated population. In 2000, 42 percent of the region's adults 25 and older held a bachelor's or higher degree, compared with a national rate of 25.6 percent. Only the San José region of California has a higher percentage of bachelor's degree holders among its residents, at 42.4 percent. The percentage of residents in the region with a bachelor's degree or higher has risen throughout the 1990s, increasing from 36.2 percent in 1991.



Additional information on educational attainment beyond the bachelor's degree is available from the *Potomac Index* household survey of area residents. As of 2001, 19 percent of the region's residents have taken graduate-level courses or hold a graduate degree. Educational attainment varies by race and ethnicity. Approximately 24 percent of the region's whites have taken graduate

courses or have a graduate degree, compared with 8 percent of African-Americans and 14 percent of Hispanics. Whites are also more likely than African-Americans and Hispanics to report that a bachelor's degree is their highest education level, at 29 percent, 16 percent, and 20 percent, respectively. Hispanics and African-Americans continue to face obstacles to higher-education opportunities, as personal financial restrictions and reduced access to college preparatory courses in high school hamper college attendance.

Percentage of Adults with a Bachelor's Degree or Higher in the Greater Washington Region, 1991-2000



Source: U.S. Census Bureau, Current Population Survey

The Top 15 Metropolitan Areas with the Highest Percentage of Adults with a Bachelor's Degree or Higher, 2000



Source: U.S. Census Bureau, 2000 Current Population Survey

19. COLLEGE AND UNIVERSITY ENROLLMENTS AND DEGREES CONFERRED

Regions with good systems for higher education provide an opportunity to train, attract, and retain talent, whether that talent originates locally or from another region. Institutions of higher education spawn business incubator centers, attract talent from around the world, provide educational resources for existing residents, support affiliated teaching hospitals, sponsor cultural activities and speakers' series, exert stabilizing influences upon neighborhoods, invest in infrastructure, and in other ways enrich the metropolitan area. Enrollment figures and the number of degrees conferred provide a measure of the robustness of the higher-education sector in the region.

Enrollment and Degrees Increase in the 1990s



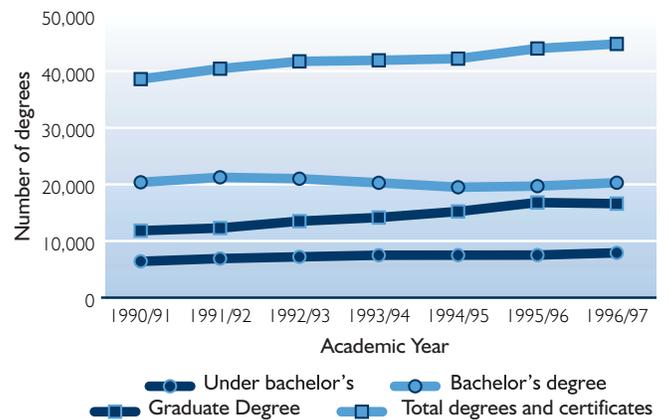
In the fall of 1999, 258,351 students were enrolled in the area's 28 major universities, four-year colleges, and community colleges. Students at four-year colleges accounted for a bit more than 40 percent of the total, followed by students at community colleges (37 percent) and students in graduate programs (22 percent). Enrollment dipped in the mid-to-late 1990s, but

overall the total number of enrolled students increased slightly (2.5 percent) during the decade from 252,150 in 1990.

The number of degrees conferred has also grown throughout the 1990s, with an 18 percent increase from 38,052 in the 1989-1990 school year to 44,811 in the 1996-1997 school year, the most recent year for which comparable data are available. Bachelor's degrees consistently account for the largest portion of the total number of degrees granted.

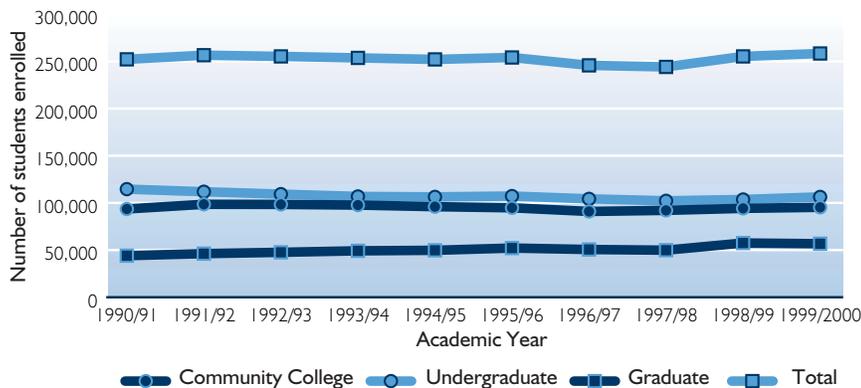
According to the Greater Washington Initiative's Higher Education Degrees Study (*available at www.greaterwashington.org*), the region's colleges and universities enrolled 285,000 students and graduated 48,861 students in the 1999-2000 fiscal year. These figures differ from the figures quoted above due to the use of different methodologies. The *Index* enrollment calculations were based on a smaller number of schools than the GWI figures, since time-series data were not available for all institutions. The degrees awarded figures differ because the *Index* and the GWI report used different sources.

Number and Type of College and University Degrees Granted in the Greater Washington Region, 1990-1997



Source: National Science Foundation, WebCASPAR

College and University Enrollment by Type of Institution in the Greater Washington Region, 1990-2000



Source: Maryland Higher Education Commission; National Center for Educational Statistics, Integrated Post-Secondary Data System; National Science Foundation, WebCASPAR; and the State Council of Higher Education for Virginia

20. CONTINUING EDUCATION

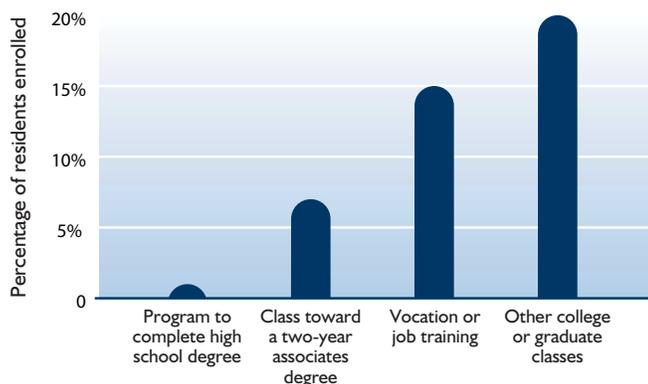
Post-secondary and continuing education programs play an important role in the educational infrastructure of the region. A variety of educational choices provided in flexible ways permits adult learners to upgrade skills, receive job training, make mid-career changes, and enhance professional credentials. In the regional household survey completed for the *Index*, continuing education included enrollment in a GED program, job or vocational training, classes toward a two-year associate's degree, or other college or graduate classes.

Residents Actively Continue Their Education; African-Americans and Hispanics Enroll at High Rates

In 2001, 33 percent of Greater Washington Region residents reported that they have enrolled in at least one of the aforementioned types of educational program, with nearly 10 percent of residents enrolled in more than one such program. The distribution is as follows: 1 percent of residents have participated in GED programs to complete their high school degree, 15 percent have participated in job or vocational training, 7 percent have taken courses toward a two-year associate's degree, and 20 percent have taken college or graduate classes.

Enrollment in post-secondary and continuing education varied by race and ethnicity, with higher rates among Hispanics and African-Americans than whites. For example, 28 percent of Hispanics, 29 percent of African-Americans, and 18 percent of whites were enrolled in college or graduate classes. Hispanics (16 percent) and African-Americans (10 percent) also enrolled in classes toward a two-year associate's degree at higher rates than did whites (six percent).

Percentage of Adults in the Greater Washington Region Enrolled in Continuing or Post-Secondary Education in the Past Year, 2001



Source: Greater Washington Region Adult Population Survey, August 2001

21. COLLEGE-BOUND SENIORS

A student's decision to attend college upon graduation from high school suggests that the educational system has been successful in its task of preparing its students for higher education. The college-bound seniors indicator provides an assessment of the educational aspirations of high school graduates emerging from the region's public schools. The District of Columbia, Suburban Maryland and Northern Virginia collect similar information on seniors' post-graduation plans, including attendance at two-year or four-year colleges and universities, whether full-time or part-time.

College-Bound Public High School Seniors in the Greater Washington Region, 1998-2001

	1998-1999	1999-2000	2000-2001
District of Columbia	—	63.8%	68.3%
Suburban Maryland	77.6%	76.4%	—
Northern Virginia	78.6%	77.8%	—

Source: District of Columbia Public Schools; Maryland State Department of Education; Virginia Department of Education.

NOTE: Northern Virginia and Suburban Maryland school districts survey only graduating seniors, while the District includes some non-graduating seniors in its survey. Adjustments were made to accommodate these differences.

Proportion of College-Bound Students Increases in District of Columbia Schools, Remains Steady in Suburban Maryland and Northern Virginia

In the 1998-99 and 1999-2000 school years, a little over 75 percent of graduating high school seniors in both Suburban Maryland and Northern Virginia reported plans to continue their education. Data for the District of Columbia (which cover different years and also include some non-graduating seniors in its calculations), show an increase in the number of college-bound seniors. In the 1999-2000 school year, 64 percent of District of Columbia seniors indicated that they planned to continue their education, a figure that rose to 68 percent in 2000-2001.

Quality of Life

Vision:

“Build a region that residents and visitors alike believe to be a safe and desirable place to live, work, and play.”

Clean air, clean water, and an abundance of well-maintained public parks and green spaces are some of the basic environmental qualities that regions must have in order to attract and retain businesses and residents. **The Greater Washington Region continues to face challenges in reducing the ozone levels in the air we breathe and in improving the water quality of the Anacostia River.** But the region has maintained almost 234,000 acres of parkland, providing recreational resources and environmental benefits to the region and to its residents. Residents are concerned, however, about the pace of development in the region and the amount of time they spend stuck in traffic. Recent studies show that **the region is consuming land at a faster rate than population growth and has one of the worst traffic congestion problems in the country.**

In contrast, **the region’s public transit system is one of the best in the country and has experienced strong ridership increases since the mid-1990s.** In fact, Metrorail is straining to meet those ridership demands in some areas: weekday ridership on the recently completed Green Line approached 30,000 a day in the first two weeks of operation, surpassing the six-month projection of 22,000 riders per day.

The September 11 terrorist attacks and subsequent events may affect the region’s quality of life. Concern about personal safety now encompasses fear of further terrorist acts. The November *Potomac Index* survey showed that the public is split in its perception of the region’s readiness to handle security emergencies, with roughly equal numbers saying that they believe the region is prepared to deal with threats like terrorist attacks and anthrax (43 percent) as those who say they do not believe the region is prepared (about 40 percent). How deeply these safety concerns will affect the long-term view of quality of life in the region cannot yet be determined.

However, concerns about September 11 and its aftermath are not prompting people to leave. **Residents are still committed to the region, apparently even more now than previously.** In November, 77 percent of residents said they plan to continue living here for the foreseeable future, up from 72 percent who said so in early August. Those who plan to leave do not mention security concerns when asked why they might go, and are most likely to mention job changes or retirement.

22. AIR QUALITY

High ozone levels in the air we breathe trigger a variety of health and respiratory problems, can cause permanent lung damage after long-term exposure, and damage plants and ecosystems. Ozone is a pollutant created when volatile organic compounds and nitrogen oxides are exposed to sunlight. Motor vehicle exhaust and industrial emissions, gasoline vapors, and chemical solvents are some of the major sources of the chemicals that react with each other to form ozone. In the Greater Washington Region, transportation sources account for about one-third of the air pollutants that cause high ozone levels. High levels of ozone typically occur during the warmer months of May through September.

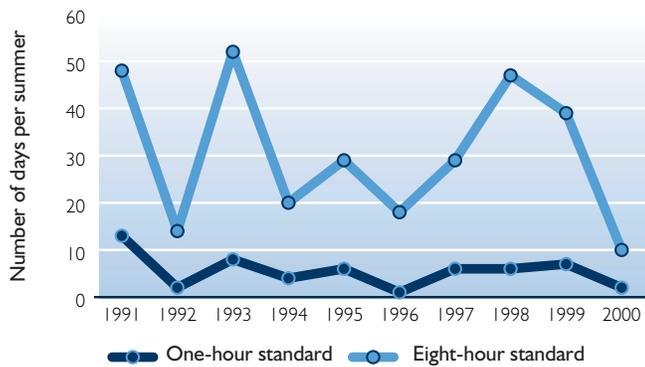
Region Continues to Violate Federal Standards but Has Made Some Improvements in Recent Years

Like many major metropolitan areas, the Greater Washington Region was in violation of the federal air quality standards regularly throughout the 1990s. The region violated the eight-hour ozone standard an average of 31 times and the one-hour standard an average of 5.5 times per summer between 1991 and 2000. The 2000 figures for both the eight-hour and one-hour standard violations represent an improvement from previous years, but the improvement is probably due to that summer's unusually cool and rainy weather — conditions that do not encourage the production of ground level ozone.

Nevertheless, the region's ozone levels have improved throughout the 1990s: in 1991, 57 percent of air quality monitors met the air quality standards, a figure that rose to 84 percent in 2001.

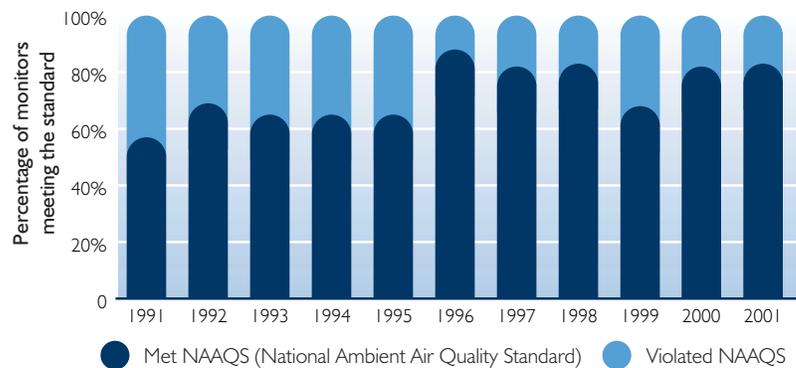
Addressing the air pollution problem is important not only for health reasons. The region's transportation plan stipulates that the region must be in compliance with the ozone limits by 2005. If the region exceeds the emissions target, transportation planners would need to offset any "excess" emissions above the limit by adopting measures to reduce car use, in order to avoid jeopardizing federal transportation funding.

Number of Days per Summer the Greater Washington Region Exceeded the One-Hour and Eight-Hour Ozone Standards, 1991-2000



Source: Metropolitan Washington Council of Governments, Department of Environmental Programs

Percentage of Air Quality Monitors Meeting the One-Hour Air Quality Standard in the Greater Washington Region, 1991-2001



Source: Metropolitan Washington Council of Governments, Department of Environmental Program

Note: The standard shown is the one-hour National Ambient Air Quality Standard (NAAQS) set by the Clean Air Act Amendments of 1990. Air quality monitors throughout the region collect hourly data of ground level ozone. The average highest daily ozone reading from each monitor is calculated every hour. To meet the standard, this one-hour ozone design value must remain below the threshold set by the U.S. EPA.

23. WATER QUALITY

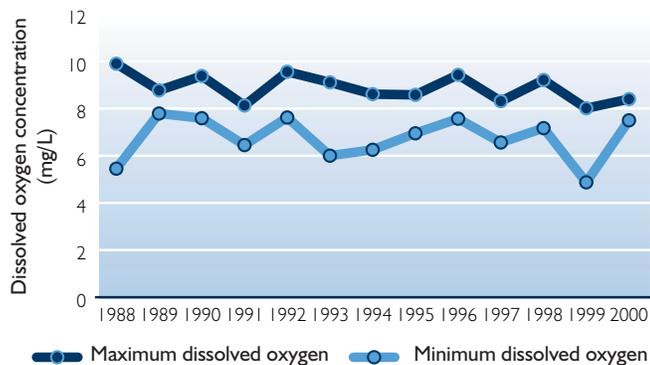


The concentration of dissolved oxygen in our rivers is one of the key indicators of water quality, since almost all aquatic organisms need oxygen to live. Low levels of dissolved oxygen are indicative of poor water quality conditions. The presence of sewage and other organic pollutants in the water

is an important factor causing low oxygen levels, as more oxygen in the water is consumed in decomposing the pollutants than can be produced through photosynthesis and atmospheric sources.

Fish become threatened when dissolved-oxygen levels drop below 3.0 milligrams per liter (mg/L). Water quality standards for oxygen typically are about 4.0 mg/L to 5.0 mg/L for a daily or monthly average. Because the amount of oxygen in water decreases with increasing temperature, conditions are typically at their worst in the summertime.

Water Quality of the Potomac River at Key Bridge: Summer Months' Average Maximum & Minimum Dissolved Oxygen Levels, 1988-2000



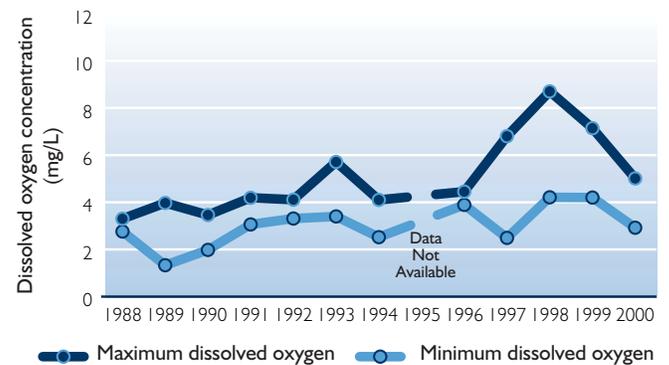
Source: Metropolitan Washington Council of Governments, Department of Environmental Programs

Potomac River Is Healthy, but the Anacostia River Needs Improvement

The Potomac River has exhibited good dissolved-oxygen concentrations during the summer months, with monthly average conditions higher than 5.0 mg/L. Several decades ago, the Potomac River had low oxygen levels, but significant improvements at Blue Plains and other wastewater treatment plants have greatly improved the river's water quality.

In the Anacostia River, conditions continue to be poor, with monthly average conditions often below 4 mg/L and sometimes below 3 mg/L. Low flow rates limit the river's ability to flush itself of oxygen-consuming pollutants. Even so, there is a positive trend of increasing dissolved-oxygen concentrations during the past twelve years. Statistical estimates indicate that these levels are increasing at a rate of approximately 0.15 mg/L to 0.22 mg/L per year. Much of this increase is attributable to improvements in the combined sewer system in the District of Columbia, as well as to other watershed-wide efforts to reduce pollutants to the river.

Water Quality of the Anacostia River at Seafarer's Marina: Summer Months' Average Maximum and Minimum Dissolved Oxygen Levels, 1988-2000



Source: Metropolitan Washington Council of Governments, Department of Environmental Programs

24. PARKS AND OPEN SPACE

Parks are recreational resources and environmental assets within a community. They have social as well as environmental benefits. Attractive, safe, and usable parks offer clear advantages to their surrounding neighborhoods. They provide a public space for a host of uses, such as sports and recreation, community events, and festivals. Additionally, they offer green spaces in urban settings and protect natural resources.

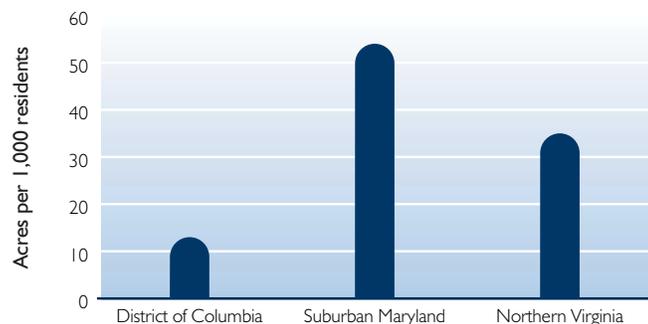
Residents Rate the Region Highly on Parkland

In 2001, the amount of parkland in the area included in excess of 157,000 acres in Suburban Maryland, a bit more than 70,000 acres in Northern Virginia, and more than 7,000 acres in the District of Columbia.

Measured against other high-density urban areas, the District ranks second in the nation in terms of the amount of parkland that it offers its residents. An analysis by the Trust for Public Land found that only the city of Minneapolis has more acres of parks and open space per 1,000 residents. *(For more information, please visit the Trust for Public Land's website at <http://www.tpl.org>.)*

Residents think highly of the amount of parks and open space in the region, with 55 percent rating the region as better than other areas on this issue. Residents in the inner and middle rings rate the region more highly than do those in the outer ring.

**Acres of Parkland per 1,000 Residents:
District of Columbia, Suburban Maryland,
and Northern Virginia, 2001**



Source: Metropolitan Washington Council of Governments, Department of Human Services, Planning, and Public Safety

25. LAND USE, GROWTH, AND DENSITY

American metropolitan areas are getting larger, and most are getting less dense, as people and businesses move to once-open land – and the Greater Washington Region is no exception. As a result, the region is finding that it needs to balance the interest in building housing, roads, and other development to accommodate population growth with the desire to protect farmlands and pastures and preserve the existing character of communities.

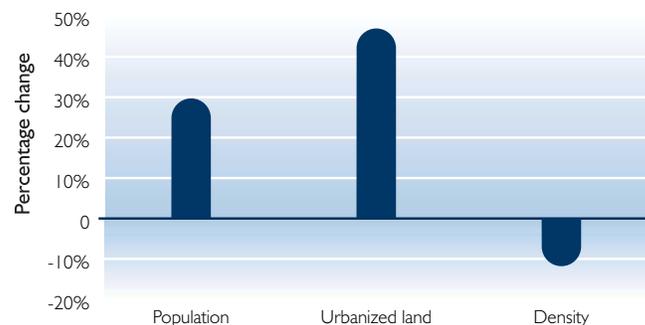
Of course, suburban areas grow for many reasons. People and businesses move in search of large homes, good schools, skilled labor pools, and cheaper land. But this decentralization of residential and employment patterns comes with a price, such as traffic congestion, longer commuting times and the loss of open space.

Developed Land Increases Faster than Population

One way to assess the region's growth and development is to assess its density, with "density" defined as the development of urbanized land relative to population growth, or the number of people per developed acre. Urbanized land consists of built-up areas, such as land developed for residential, industrial, or commercial purposes.

Between 1982 and 1997, the population of the Greater Washington Region grew by nearly 30 percent. During the same period, the land developed to accommodate that growth increased by 47 percent to 741,300 acres. Therefore, the region's density *decreased* by 12 percent from 6.67 persons per developed acre to 5.88. Density for the entire United States decreased by 20 percent during the same period.

**Percentage Change in Population, Urbanized Land,
and Density in the Greater Washington Region,
1982-1997**

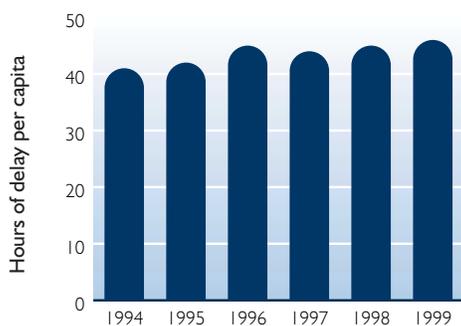


Source: 1997 National Resources Inventory, Department of Agriculture; 1990 and 2000 Census, with estimates of 1982 and 1997 population data

26. TRAFFIC CONGESTION

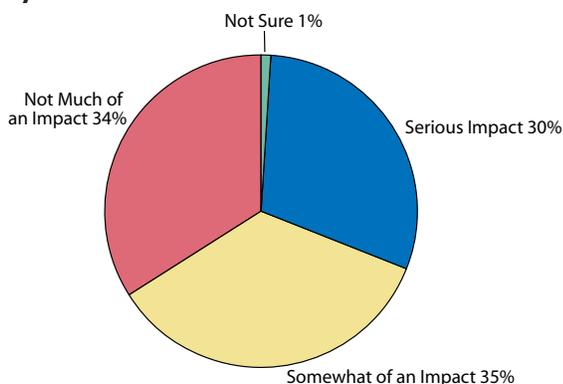
Traffic congestion is a prevailing condition in numerous metropolitan areas and a source of frustration for many residents in the Greater Washington Region. Time spent sitting in traffic is time lost from other pursuits, work, recreational activities, and family and friends. It affects residents' perceptions of the region as an attractive place to live and work. Additionally, congestion translates into significant increases in the air pollutants that contribute to violations of the ozone standard.

Annual Vehicle Hours of Delay Per Capita Due to Traffic Congestion, Greater Washington Region, 1994-1999



Source: Texas Transportation Institute

Percentage of Residents in the Greater Washington Region Who Say Traffic Congestion Impacts Their Quality of Life



Source: Greater Washington Region Adult Population Survey, August 2001.

Traffic Delays Continue to Increase

The Greater Washington Region has one of the most congested highway systems among major metropolitan areas in the country. According to data from the Texas Transportation Institute, residents experienced an annual delay of 46 hours from traffic congestion in 1999, up from 41 hours five years earlier, in 1994. Compared with other metropolitan areas, the Greater Washington Region ranks fifth in per capita vehicle hours of delay, in a tie with Dallas and behind Los Angeles, Seattle-Everett, Atlanta, and Houston. (For more information, please visit the Texas Transportation Institute's website at <http://mobility.tamu.edu>.)

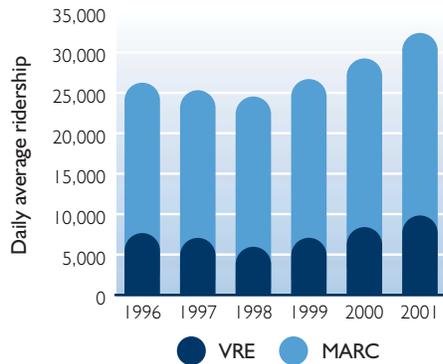
Two-thirds of the region's residents say that traffic congestion has an impact on the quality of their life. Residents also report making a number of changes compared with a few years ago due to congestion: 43 percent are leaving for work earlier in the morning, 34 percent are spending less time with their families, 26 percent are taking public transit more, and 28 percent are considering moving out of the area.

In addition to the Texas Transportation Institute's analysis, a measurement calculated by the Surface Transportation Policy Project includes transit use in determining the effects of congestion. According to the Project, although the Greater Washington Region suffers from major congestion, the region's extensive transit network lessens the burden of congestion by providing alternatives to driving. Because about 450,000 commuters in the region (approximately 20 percent of the total) travel to work by means other than driving, the region's ranking drops from 4th to 31st in rush hour congestion. (For more information, please visit the Surface Transportation Policy Project's website at <http://www.transact.org/Reports/tti2001/default.html>.)

27. TRANSIT USE

Mass transit is an integral part of the Greater Washington Region's transportation network. The region's subway, bus, and commuter rail systems provide transportation alternatives to automobile use, as well as crucial mobility and access to jobs for those residents who do not own cars. Transit use reduces emissions and eases congestion on our highway network by taking vehicles off the road.

Average Daily Ridership for the Maryland Commuter Rail (MARC) and the Virginia Railway Express (VRE), 1996-2001



Source: Virginia Railway Express and Maryland Mass Transit Administration.

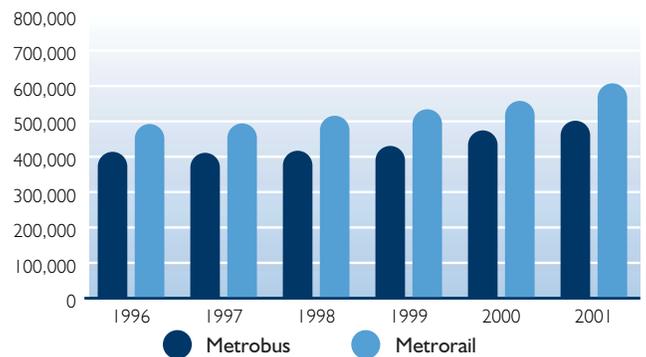
Transit Ridership Continues Rapid Increase

About 45 percent of all commuting trips to downtown Washington, D.C., are made by transit. The region's Metrorail system carried more than 600,000 riders per day in 2001 and is second only to the New York metropolitan area in subway ridership. The Metrobus system carried more than 500,000 riders per day that same year. Between fiscal years 1996 and 2001, the Metrorail and Metrobus systems experienced increases in daily ridership of 21 percent and 23 percent, respectively.

A number of local bus systems augment the Metrobus system, including Alexandria's DASH system, Montgomery County's Ride On system, and the city of Fairfax's CUE system. Additionally, the region is served by the Virginia Railway Express and Maryland Commuter Rail networks, which combined serve more than 32,000 passengers daily and have increased their ridership since 1996 by 28 percent (VRE) and 21 percent (MARC).

Nineteen percent of residents say that they use the transit system once a week or every day, and 15 percent respond that they use transit several times a month, for a total of 34 percent who make consistent use of the region's public transportation system. Residents of the inner and middle rings, with better access to public transit, report significantly higher rates of ridership than do residents of the outer ring. In the inner ring, almost 60 percent of residents use transit regularly, as do 36 percent in the middle ring, and 17 percent in the outer ring.

Average Daily Ridership for Metrorail and Metrobus, 1996-2001



Source: Washington Metropolitan Area Transit Authority (WMATA)

28. VIOLENT-CRIME RATE

The levels and perception of violent crime can undermine individuals' sense of security and the stability of neighborhoods and communities. An environment in which people feel safe greatly improves the quality of life in a community.

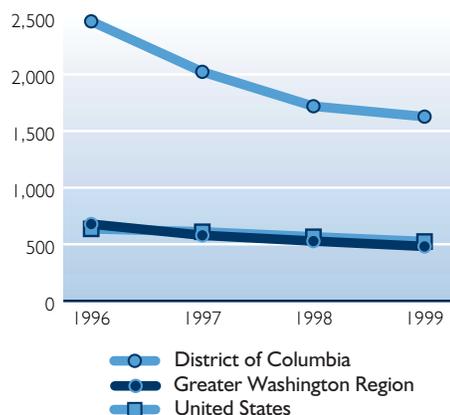
Violent Crime Continues to Decline

The rate of violent crime continuously declined in the Greater Washington Region from 1996 to 1999, from 678 per 100,000 people in 1996 to 482 crimes per 100,000 in 1999, a decline of almost 30 percent. The crime rate in the District of Columbia, although substantially higher than that of the region as a whole, experienced a larger decline of 34 percent.

Overall, residents in the region do not report a high level of fear of violent crime: 10 percent say they "worry a lot" about violent crime in their neighborhood and 40 percent say they "worry a little." African-Americans and Hispanics are more likely than whites to be concerned about crime. Residents living in the inner ring as well as those earning less than \$50,000 per year are also more likely to be worried about crime.

Since September 11, parts of the region have experienced an upswing in crime. Statistics from the Metropolitan Police Department of the District of Columbia confirm that in the period of September 11 to December 31, 2001, rates of homicides, robberies, burglaries, and auto thefts were higher than in the same time period in 2000. But as the *Potomac Index* goes to press, no data are yet available to assess the cause of the increase.

Number of Violent Crimes Annually per 100,000 Residents in the Greater Washington Region, the District of Columbia, and the United States, 1996-1999



Source: FBI, Uniform Crime Reports as prepared by the National Archive of Criminal Justice Data

29. PARTICIPATION IN THE CULTURAL ARTS

Cultural arts and activities are an important element in the quality of life enjoyed by individuals and communities. The diversity, creativity, and dynamism of a community are often expressed and understood through cultural activities.



High Numbers of Residents Take Part in Cultural Activities

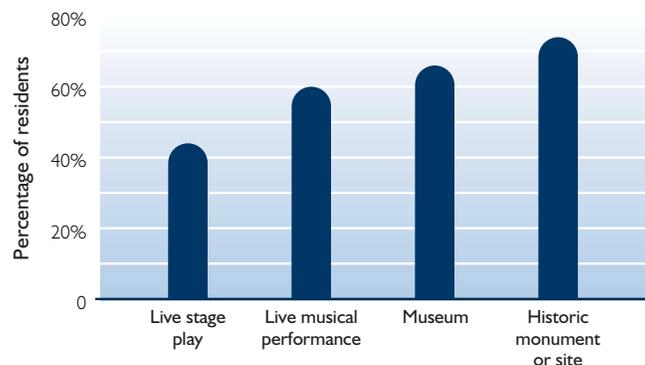
The Greater Washington Region offers world class cultural resources, such as museums, historical sites, and a plethora of performing arts spaces and organizations. The region's residents clearly are taking advantage of the vast array of cultural opportunities available in the region.

The most popular cultural activities are visits to museums or historic monuments or sites, most likely a reflection of the region's special status as home to numerous national monuments and the Smithsonian Museum.

Survey results showed that people at higher income levels attend more cultural activities. However, a number of options exist for free and low-cost arts events in the Greater Washington Region. For instance, the Kennedy Center's Millennium Stage offers free performances every day and the Stages for All Ages program offers families discounted tickets every spring.

In addition to attending arts programs, residents also give their time and money to arts organizations and events. Thirteen percent of survey respondents indicated that they volunteer for an arts or cultural organization, and 16 percent said they have made a donation to such an organization.

Percentage of Residents in the Greater Washington Region Who Have Attended a Cultural Arts Activity in the Last Twelve Months, by Type of Event, 2001



Source: Greater Washington Region Adult Population Survey, August 2001

Vision:

“Cultivate regional thinking and action that enable residents and the private, public, and nonprofit sectors to work together, for collaboration is the only way to address the economic and social concerns that bind the region together.”

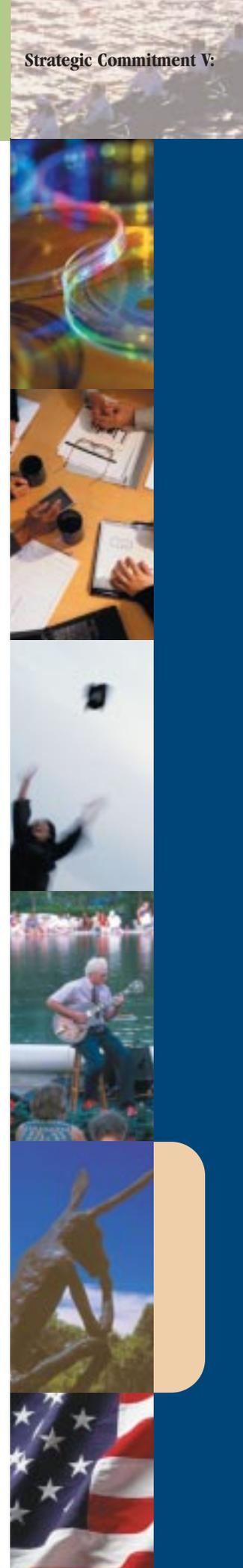
A shared regional identity is based on the recognition that the Greater Washington Region, although comprising different state and local political entities, is bound together by shared economic and social interests. **The numbers of residents who identify with the region, already high, surged even higher after the events of September 11.** Indeed, residents are showing more pride about living in the region, with more residents rating the region favorably after September 11.

Regional collaboration refers to the network of relationships across political and geographic boundaries that is the basis of initiatives to support and sustain the vitality of the region and its component jurisdictions. Fundamental to efforts addressing regional issues is the web of relationships among local governments, residents, and business, political, and nonprofit leaders that crosses political boundaries and spans jurisdictions.

Although the events of September 11 dramatically highlighted the need for further regional cooperation, **local governments were already actively cooperating with each other on a wide number of issues** prior to that day. For instance, federal law mandates that the region work together on transportation planning. The existence of long-standing mutual-assistance agreements among local public-safety agencies made possible the rapid response of emergency services personnel from virtually all the local jurisdictions when the Pentagon was attacked.

The events of that day did, however, expose the gaps in regional planning, communication, and cooperation. The lack of communication among the myriad federal, state, and local agencies and organizations in the region became undeniably clear as decisions about office, school, and road closings were made with little coordination. When the federal government sent its workers home, for example, there was no plan for organizing the resulting mass exodus of workers from their offices.

Since then, regional leaders have actively collaborated to increase the region’s preparedness for future emergencies. The Greater Washington Board of Trade and the Washington Metropolitan Council of Governments have both launched major initiatives to integrate preparedness and communications plans for government, business and the nonprofit sector.



30. SHARED REGIONAL IDENTITY

A shared regional identity is grounded in the belief that the different localities in the area are connected by economic and social interests, that residents share common concerns, and that they care about the health and quality of life of the region. This sense of interconnectedness is the foundation for efforts to address issues that cross jurisdictional boundaries.

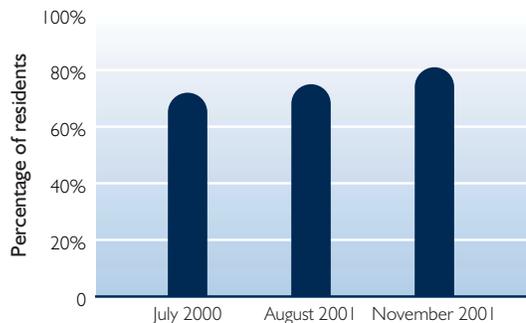
Residents Continue to Identify with the Greater Washington Region in High Numbers

Although the region crosses two state lines and the District of Columbia, 75 percent of respondents to the August 2001 *Potomac Index* survey said they feel part of the Greater Washington Region. This figure is up slightly from 72 percent in 2000, confirming that a large portion of residents continues to identify with the region.

Several patterns emerge in both the 2000 and 2001 survey data. Those in the core and middle rings of the region are significantly more likely to feel a sense of belonging in the region than those in the outer ring. Additionally, education and earning levels are also tied to regional identity: those with higher education and income levels are more likely to identify with the region.

The November 2001 *Potomac Index* survey found that the number of residents reporting that they feel part of the region had surged to 81 percent. Residents as far from the region's core as Fredericksburg and St. Mary's County are increasingly likely to say they feel part of the Greater Washington Region.

Percentage of Residents Who Feel that They Belong to the Greater Washington Region, 2000 and 2001

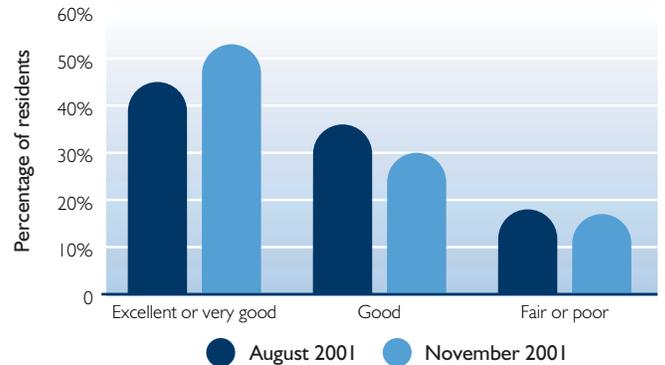


Source: Greater Washington Region Adult Population Survey, July 2000, August 2001, and November 2001

31. RATING THE REGION AS A PLACE TO LIVE

How residents rate the region as a place to live is a basic measure of their overall satisfaction (or dissatisfaction) with the region. It provides a snapshot of residents' perceptions as to whether the region provides them with the quality of life they desire.

Rating the Greater Washington Region as a Place to Live: August 2001 and November 2001



Source: Greater Washington Region Adult Population Survey, August 2001 and November 2001

Most Residents Rate the Region Highly

In the August 2001 survey, 81 percent of residents in the Greater Washington Region rate it favorably as a place to live. Specifically, 45 percent call the region an "excellent" or "very good" place to live, and another 36 percent rate the region as "good."

Residents in the core and the middle ring of the region are significantly more likely to rate the region highly than are those in the outer ring. Those who do not feel they are part of the region are much more likely to offer a negative rating, with 37 percent calling the region a "fair" or "poor" place to live, compared with only 12 percent of those who do feel part of the region.

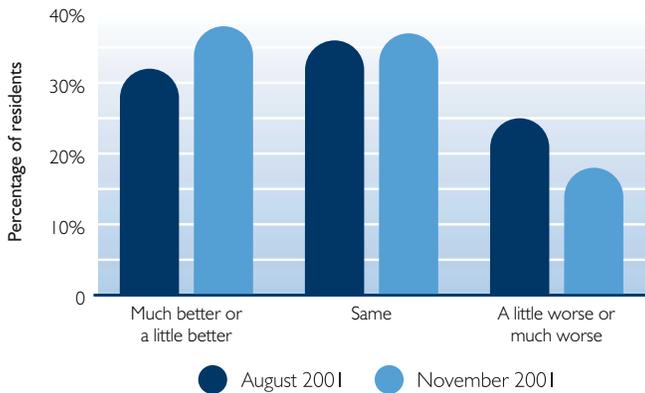
Additionally, individuals who are homeowners and who have higher levels of education and income are significantly more likely to rate the region highly than are the region's lower-income and less-educated citizens.

The November 2001 survey found that residents were expressing more pride about living in the region than just three months previously, with 53 percent calling it an "excellent" or "very good" place to live, compared with 45 percent in August.

32. RATING THE EFFECTIVENESS OF THE REGION'S LEADERSHIP IN ADDRESSING REGIONAL PROBLEMS

A number of issues critical to the region — such as a healthy environment, efficient transportation systems, and economic growth — are impossible for any one jurisdiction to resolve acting alone. Effectively addressing cross-jurisdictional concerns requires strong relationships within the region that are not limited by political and geographic lines.

Rating the Effectiveness of the Region's Leadership in Addressing Regional Problems, Compared with Leaders in Other Areas, August 2001 and November 2001



Source: Greater Washington Region Adult Population Survey, August 2001 and November 2001

Regional Leaders Are Rated Higher after September 11

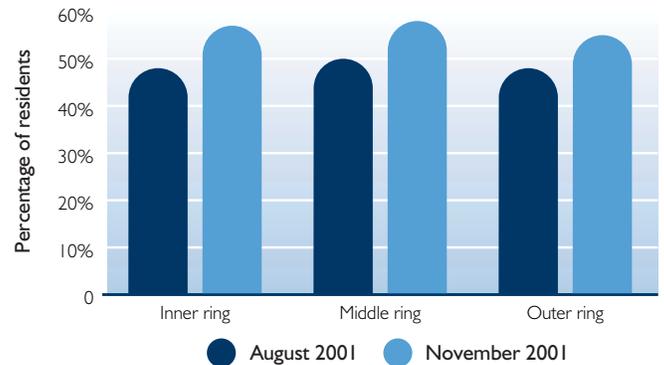
In the August survey, only 32 percent of area residents rated the region's leaders as more effective on regional issues than leaders in other metropolitan areas. An additional 36 percent rated them as effective as leaders in other areas, for a total of 68 percent giving favorable ratings. The relatively low percentage of residents giving regional leaders high ratings on regional issues in the August survey suggested that residents were dissatisfied with the level of regional cooperation and were interested in greater collaboration among regional leaders.

But findings from the November survey suggest that residents acknowledge the efforts of regional leaders to address the challenges of emergency response, economic recovery and public-health hazards. A total of 75 percent gave favorable ratings in the November survey, up from 68 percent three months earlier.

33. INTEREST IN REGIONAL ACTION ON TRANSPORTATION ISSUES

Planning and maintaining the regional public transit system and the road and highway network require multi-jurisdictional cooperation, because of the scale of the investment required and because transportation networks by their very nature move people and goods across political boundaries. A considerable amount of collaboration on transportation issues is already taking place around the region, the most prominent examples being the Metrorail and bus system. However, some have proposed that an independent, regional transportation authority with the power to undertake road and transit projects would enhance the area's ability to undertake a regional approach to transportation planning. The level of support for a regional transportation authority with the power to spend tax dollars across jurisdictional boundaries provides one threshold measurement of the public's willingness to act regionally.

Support for a Regional Transportation Authority with the Ability to Spend Tax Dollars on Roads and Transit Projects throughout the Region, by Subregion, August 2001 and November 2001



Source: Greater Washington Region Adult Population Survey, August 2001 and November 2001

A Majority of Residents Support Regional Action on Transportation

In August, 57 percent of the region's residents supported the idea of a new regional transportation authority empowered to undertake regional transportation projects, with 27 percent opposed and 16 percent undecided. Among the jurisdictions, support was highest in Virginia at 62 percent, followed by Maryland at 54 percent and the District of Columbia at 49 percent.



These August responses were more mixed in regard to a second question on a regional transportation authority, this one specifying that the authority would have the power to use a resident's tax dollars on road and transit projects outside of his or her home jurisdiction. In August, 49 percent were in favor and 42 percent opposed, suggesting more hesitancy about regional collaboration when it would involve the possibility of directing public dollars away from a person's own jurisdiction.

Support was strongest among Northern Virginia residents, at 54 percent, followed by Suburban Maryland residents at 47 percent and District of Columbia residents at 43 percent.

The November survey found a noticeable upsurge in support for regional transportation action. In this follow-up survey, 57 percent said they would be willing to support a regional transportation authority with the ability to redirect money across jurisdictional lines for road and transit projects, as compared with 49 percent three months earlier. The region appears to be experiencing increased interest in cooperation on cross-jurisdictional matters.

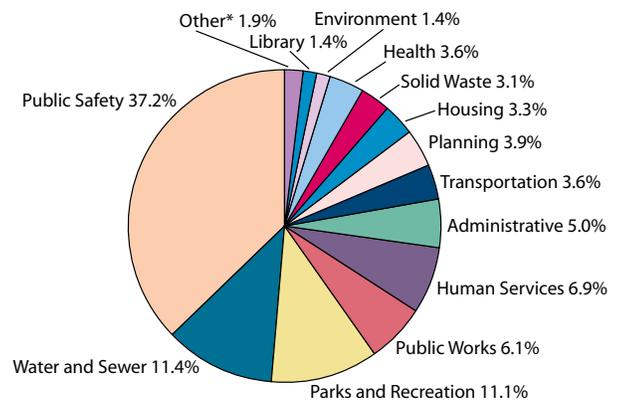
34. LOCAL INTERGOVERNMENTAL COOPERATION

The Greater Washington Region is served by different state, county, and municipal governments, but it is an area with common needs and with many shared economic and social interests. Local governments often work together to address common concerns or to coordinate the delivery of services important to their residents and to the region as a whole, such as water supply, sewage treatment, mass transit and public safety.

The Region Has Many Intergovernmental Agreements

A mail survey of local government agencies identified 360 local intergovernmental agreements. These agreements cover a wide range of functions and services and illustrate how actively governments in the region cooperate with each other.

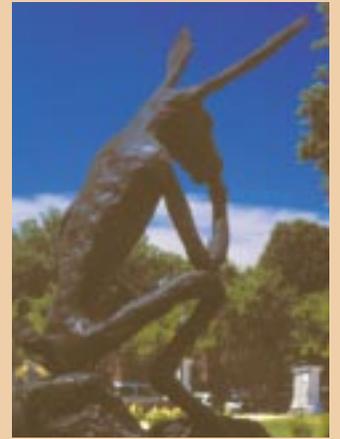
Categories of Intergovernmental Agreements in the Greater Washington Region



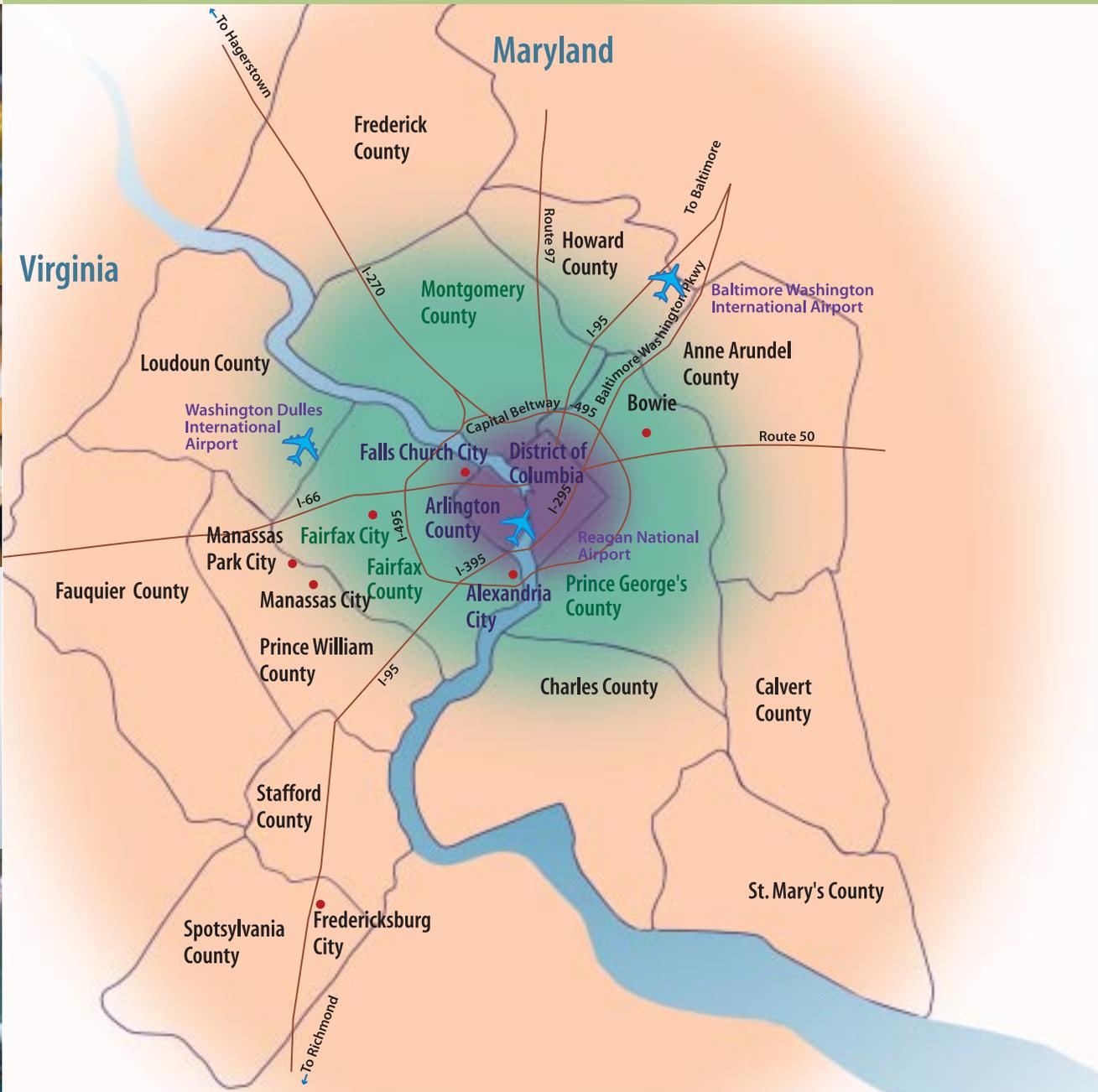
Source: Survey of Intergovernmental Agreements, August 2001.
* Economic development, multipurpose, and workforce agreements.

The agreements vary greatly in their scale and range of activities. The Washington Metropolitan Area Transit Authority, created by interstate compact in 1966, involves billions of dollars and serves hundreds of thousands of area residents on a daily basis. The 1999 Anacostia Restoration Agreement, signed by the District of Columbia, the state of Maryland, and Prince George's and Montgomery counties, outlines six goals promoting a healthy river and watershed. Other intergovernmental efforts, to name only a few, include planning and maintenance of regional park systems in Suburban Maryland and Northern Virginia, a water conservation/drought plan adopted by the Metropolitan Washington Council of Governments, and information sharing among Northern Virginia jurisdictions on human-services requests in order to forecast future human-services needs. All of these agreements contribute to making the Greater Washington Region a safer and better place for its residents.

About a quarter of the agreements are between counties and their municipalities, delineating the division of services between the county and municipal governments, which, although an indication of intergovernmental cooperation, are not particularly significant in terms of cooperation across the region. Most agreements are between jurisdictions within the state of Maryland or Virginia; there is more intergovernmental cooperation within the individual subregions of Suburban Maryland and Northern Virginia than between the two states. Only about 10 percent of the 360 agreements are interstate, meaning that they involve local governments from at least two of the three Greater Washington Region jurisdictions — the District of Columbia, Maryland and Virginia.



Data Sources



Counties and Independent Cities by Geographic Ring

INNER RING

Alexandria, VA
 Arlington County, VA
 District of Columbia
 Falls Church, VA

MIDDLE RING

Fairfax County, VA
 Fairfax City, VA
 Montgomery County, MD
 Prince George's County, MD

OUTER RING

Anne Arundel County, MD
 Calvert County, MD
 Charles County, MD
 Fauquier County, VA
 Frederick County, MD
 Fredericksburg, VA
 Howard County, MD
 Loudoun County, VA
 Manassas/Manassas Park, VA
 Prince William County, VA
 St. Mary's County, MD
 Spotsylvania County, VA
 Stafford County, VA

The following surveys were developed to collect data for the *Potomac Index*.

Greater Washington Region Adult Population Surveys

The Greater Washington adult perceptions surveys were conducted by Potomac Incorporated of Bethesda, Maryland. Potomac Inc. interviewed 1,033 adult residents at random during the period July 30 – August 10, 2001, including 100 interviews among Hispanic residents to bring that subgroup up to a statistically significant sample size. Following the events of September 11, many of the questions were updated and new subject matter was added during a follow-up survey of 800 residents November 16 – 26, 2001. Additionally, results from a 2000 survey conducted by Potomac Inc. for the *2000 Potomac Index* are referred to in this year's *Index*. That survey was conducted during the period July 24 – 31, 2000. The sample size was 1,000, including 100 Hispanics.

A “random digit dialing” methodology was used, meaning that phone numbers were computer generated and dialed at random. This method eliminates the bias that comes from using listed numbers only.

At the conclusion of each survey period the data were weighted to ensure their geographic and demographic characteristics properly reflected the make-up of the region's population.

The margin of sampling error for the August survey is +/- 3.3 percent at a 95 percent confidence level; for the November sample, the margin of error is +/- 3.5 percent. This means that 95 percent of the time, the survey results would differ by no more than these percentages had all adult residents of the region been interviewed. For the July 2000 survey, the margin of error was +/-3.3 percent at a 95 percent confidence level.

Survey of Intergovernmental Agreements

The Survey of Intergovernmental Agreements was a joint project of Brookings Greater Washington Research Program and the Metropolitan Washington Council of Governments (COG). The survey was sent to COG member jurisdictions and several other regional organizations in the summer of 2001.

Jurisdictions that received the survey:

District of Columbia

In Virginia:

City of Alexandria, Arlington County, City of Fairfax, Fairfax County, City of Falls Church, Loudoun County, and Prince William County.

In Maryland:

City of Bowie, Calvert County, Charles County, City of College Park, Frederick County, City of Gaithersburg, City of Greenbelt, Montgomery County, Prince George's County, City of Rockville, and the City of Takoma Park.

Specifically, it was sent to the following offices or departments within the above COG jurisdictions: county/city managers or executives, housing, public health, police, fire, transportation, environment/natural resources, social services, libraries, parks and recreation and school superintendents. However, in Charles County and Calvert County, surveys were sent only to the planning offices.

The survey was also mailed to the following organizations or agencies: District of Columbia Water and Sewer Authority, Maryland-National Capital Park and Planning Commission, Metropolitan Washington Airports Authority, National Capital Planning Commission, Northern Virginia Transportation Commission, Potomac and Rappahannock Transportation Commission, Washington Metropolitan Area Transit Authority, Washington Suburban Transit Commission, Virginia State Police, Virginia Department of Transportation, Virginia Department of Aviation, Virginia Department of Public Works and the Maryland Office of Planning.

A total of 216 surveys were mailed out, and 69 recipients responded, for a response rate of 32 percent. Because a number of local agencies did not respond to the survey, it is likely that the count of 360 agreements underestimates the actual number of local intergovernmental agreements within the region.

Unless otherwise noted, data cover the geographic area defined as the Greater Washington Region by the Greater Washington Initiative and the Potomac Conference.

STRATEGIC COMMITMENT I: INNOVATION AND ENTREPRENEURSHIP

1. Sectoral Job Mix

U.S. Department of Commerce, Bureau of Economic Analysis. In addition to wage and salary employees, these figures include self-employed workers, partnerships, and workers in start-ups and very small firms. A service-based economy, such as that of the Greater Washington Region, has many such consultants and contractors. Because the Bureau of Economic Analysis includes these workers, its figures provide a more accurate reflection of the public-private sector mix than do the Department of Labor's monthly employment figures, which undercount such workers.

2. Federal R&D (Research and Development) Contracting

General Services Administration, Federal Procurement Data Center. Data cover the Washington primary metropolitan statistical area (PMSA) as defined by the U.S. Office of Management and Budget.

3. Patents

U.S. Patent and Trademark Office.

4. Venture Capital Investment

PricewaterhouseCooper's Money Tree Survey in partnership with Venture One. Industry category designations are determined by PricewaterhouseCoopers. PricewaterhouseCoopers retabulated its dataset on venture capital investments since the last edition of the *Index*, making this year's figures different from those listed in last year's edition.

5. Fast-Growth "Gazelle" Companies

The number of gazelle companies is derived from a special data run conducted by Standard & Poor's Compustat of publicly traded companies headquartered in the Greater Washington Region. This dataset tracks all publicly traded companies filing 10K and 10Q reports with the Securities and Exchange Commission.

6. Federal Procurement of Technology and Professional Services

General Services Administration, Federal Procurement Data Center. Data cover the Washington primary metropolitan statistical area (PMSA) as defined by the U.S. Office of Management and Budget.

7. Service Sector Earnings Advantage

U.S. Department of Commerce, Bureau of Economic Analysis.

8. Spending by Nonprofits

Urban Institute, National Center for Charitable Statistics.

STRATEGIC COMMITMENT II: INCLUSION AND PARTICIPATION

9. Household Income Distribution

U.S. Census Bureau, March 2001 Supplement to the Current Population Survey. Data cover the Washington primary metropolitan statistical area (PMSA) as defined by the U.S. Office of Management and Budget.

Data on EITC filings are from "Rewarding Work: The Impact of the Earned Income Tax Credit in Greater Washington, D.C.," June 2001, by the Brookings Institution's Center on Urban and Metropolitan Policy. Data cover the Washington primary metropolitan statistical area (PMSA) as defined by the U.S. Office of Management and Budget, minus Jefferson and Berkeley counties in West Virginia.

10. Housing Affordability and Homeownership

Information on housing affordability is provided by the 1998 American Housing Survey. Data cover the Washington primary metropolitan statistical area (PMSA) as defined by the U.S. Office of Management and Budget.

Information on residents' perception of whether they can find a good job near where they live is from the Greater Washington Region Adult Population Survey, August 2001.

Data on homeownership are provided by the 1990 and 2000 Decennial Census and cover the Washington primary metropolitan statistical area (PMSA) as defined by the U.S. Office of Management and Budget.

The Housing Opportunity Index is calculated by the National Association of Homebuilders. Data cover the Washington primary metropolitan statistical area (PMSA) as defined by the U.S. Office of Management and Budget.

11. Internet Access

U.S. Census Bureau's Current Population Survey, 1998 and 2000 Internet Computer Use Supplement. Data cover the Washington metropolitan statistical area (MSA) as defined by the U.S. Office of Management and Budget.

12. Minority Business Ownership

U.S. Census Bureau, the 1992 and 1997 Economic Census. Data cover the Washington primary metropolitan statistical area (PMSA) as defined by the U.S. Office of Management and Budget.

13. Racial/Ethnic Diversity

Data on immigration patterns are derived from a report by the Brookings Institution's Center on Urban and Metropolitan Policy, "The World in a Zip Code: Greater Washington, D.C. as a New Region of Immigration," April 2001. Data cover the Washington metropolitan statistical area (MSA) as defined by the U.S. Office of Management and Budget, but excludes Calvert County, MD and Stafford County, VA.

The “dissimilarity percent” is derived from the 1990 and 2000 Census, and information on the residential patterns of different racial/ethnic groups is from the 2000 Census. Data cover the Washington primary metropolitan statistical area (PMSA) as defined by the U.S. Office of Management and Budget.

14. Volunteering and Philanthropic Giving

Data on the percentage of residents who volunteered and made charitable donations in the past year are from the Greater Washington Region Adult Population Survey, August 2001. Data on residents’ charitable activity after September 11, 2001 are from the Greater Washington Region Adult Population Survey, November 2001.

The estimate of the aggregate sum of individual donations in the region was calculated by the Urban Institute’s National Center for Charitable Statistics. Data cover the Washington primary metropolitan statistical area (PMSA) as defined by the U.S. Office of Management and Budget, excluding Berkeley and Jefferson Counties in West Virginia.

Data on foundation giving is from the Foundation Center. These donations, while made by foundations based in the region, do not necessarily all flow into the region. Based on available data, there is no way to separate out donations that are made to organizations within the region and those outside the region. Data cover the Washington primary metropolitan statistical area (PMSA) as defined by the U.S. Office of Management and Budget.

Data on corporate giving is from the *Washington Business Journal*. Data cover the District of Columbia, Montgomery and Prince George’s counties in Maryland, the city of Alexandria, and Arlington, Fairfax, Loudoun, and Prince William counties in Virginia. Corporate givers made their donations both through corporate foundations and corporate giving programs.

15. Voter Participation

Maryland State Board of Elections; D.C. Board of Elections and Ethics, Virginia State Board of Elections; the U.S. Census Bureau, and the U.S. Federal Election Commission.

Voter participation was chosen over another commonly used measure, “voter turnout,” which measures the percent of those registered to vote who turn out to vote, for several reasons. First, the rolls of registered voters are not regularly purged of those who fail to vote, meaning that individuals who move away or die are not immediately removed, producing underestimates of voter turnout. Secondly, the measure provides an indication of those who have opted out of the process all together by not registering to vote.

STRATEGIC COMMITMENT III: EDUCATION AND LIFELONG LEARNING

16. High School Dropout Rates

U.S. Department of Education, National Center for Education Statistics, Common Core of Data.

17. K-to-12 Technology Capacity

Data on the local student-to-computer ratios are from the District of Columbia Public Schools, Maryland State Department of Education, and the Virginia Department of Education. The three jurisdictions independently tabulate their school systems’ computer inventories.

Information on the national student-to-computer ratio is from the U.S. Department of Education, National Center for Education Statistics (NCES), “Internet Access in U.S. Public Schools and Classrooms: 1994-2000,” May 2001.

18. Post-Secondary Educational Attainment

Data on the number of individuals with bachelors degree and higher are derived from the U.S. Census Bureau, Current Population Survey. Data cover the Washington primary metropolitan statistical area (PMSA). The missing sequence during the mid-1990s results from definitional problems that the Census Bureau had during that time with metro regions.

Data on educational attainment beyond a bachelor’s degree are from the Greater Washington Region Adult Population Survey, August 2001.

19. College and University Enrollment and Degrees Conferred

Data sources for enrollment figures include the Integrated Postsecondary Education Data System of the National Center for Education Statistics; National Science Foundation, WebCASPAR; Maryland Higher Education Commission; and State Council of Higher Education for Virginia. Postsecondary enrollment totals include both full- and part-time enrollment in two-, four-, or graduate degree public and private academic programs. The need for varied data sources resulted from lags in availability of current or archival data from agency to agency.

Enrollment was calculated for 28 major institutions in the region, which represent the bulk of the enrollments of the approximately 150 universities, four- and two-year colleges, community colleges, and private career schools in the region. The institutions not included are estimated to enroll about 30,000 additional students, for a total enrollment of 288,000 in 1999. Institutions are excluded if their enrollment data were unavailable or available only intermittently.

Figures for degree attainment are from the National Science Foundation, WebCASPAR.

20. Post-Secondary and Continuing Education

Greater Washington Region Adult Population Survey, August 2001.

21. College-Bound Seniors

District of Columbia Public Schools, Maryland State Department of Education, and the Virginia Department of Education. The three jurisdictions independently survey their high school seniors regarding their plans upon graduation, introducing some variation into the methodology. Adjustments were made to accommodate these differences.

STRATEGIC COMMITMENT IV: QUALITY OF LIFE

22. Air Quality

Metropolitan Washington Council of Governments, Department of Environmental Programs. Data cover the Washington primary metropolitan statistical area (PMSA) as defined by the U.S. Office of Management and Budget.

23. Water Quality

Metropolitan Washington Council of Governments, Department of Environmental Programs. The data shown in these graphs represent monthly average concentrations. Periodically, conditions can exist that cause daily “sags” in dissolved-oxygen levels.

24. Parks and Open Space

Metropolitan Washington Council of Governments, Department of Human Services, Planning and Public Safety. Data cover federal, state, regional and local parkland. Data include the region as defined by the Potomac Conference, excluding St. Mary’s County, Spotsylvania County, and the cities of Falls Church, Manassas Park and Fredericksburg. Federal parkland may be slightly overstated in the Maryland suburbs, since it was not possible to exclude Washington and Allegheny counties. Data on residents’ perception of parkland in the region are from the Greater Washington Region Adult Population Survey, August 2001.

25. Land Use, Growth, and Density

Brookings Institution’s Center on Urban and Metropolitan Policy, “Who Sprawls the Most? How Growth Patterns Differ Across the U.S.,” July 2001. Data are calculated for the Washington metropolitan statistical area (MSA).

26. Traffic Congestion

Data on vehicle hours of delay are from the Texas Transportation Institute, Texas A&M University System, “The 2001 Urban Mobility Report.” Because of changes in methodology, the figures in the 2001 report by the Texas Transportation Institute are different from their 1999 report that was used in the *2000 Potomac Index*. Data are calculated for the Washington metropolitan statistical area (MSA).

Data on the impact of traffic congestion are from the Greater Washington Region Adult Population Survey, August 2001.

Data on how public transit reduces the burden of congestion in the region are from the Surface Transportation Policy Project, “Easing the Burden: A Companion Analysis of the Texas Transportation Institute’s Congestion Study,” May 2001. Data are calculated for the Washington metropolitan statistical area (MSA).

27. Transit Use

Data on the percentage of commuting trips to downtown Washington, D.C. that are made on public transit are from the Metropolitan Washington Council of Governments/ Transportation Board Household Travel Survey, Summary of Major Findings, January 1998.

Data on Metrorail and Metrobus ridership are provided by the Washington Metropolitan Area Transit Authority. Data on Virginia Railway Express ridership are provided by Virginia Railway Express. Data on MARC ridership are provided by the Maryland Mass Transit Administration.

Data on how often residents use public transportation are provided by the Greater Washington Region Adult Population Survey, August 2001.

28. Violent-Crime Rate

Federal Bureau of Investigation, Uniform Crime Reports, as prepared by the National Archive of Criminal Justice Data. Regional data are calculated for the Washington primary metropolitan statistical area (PMSA).

Data on residents’ fear of crime is provided by the Greater Washington Region Adult Population Survey, August 2001.

29. Participation in the Cultural Arts

Greater Washington Region Adult Population Survey, August 2001.

STRATEGIC COMMITMENT V: REGIONAL THINKING AND ACTION

30. Shared Regional Identity

Greater Washington Region Adult Population Survey: July 2000; August 2001, and November 2001.

31. Rating the Region as a Place to Live

Greater Washington Region Adult Population Survey: August 2001 and November 2001.

32. Rating the Effectiveness of the Region’s Leadership in Addressing Regional Problems

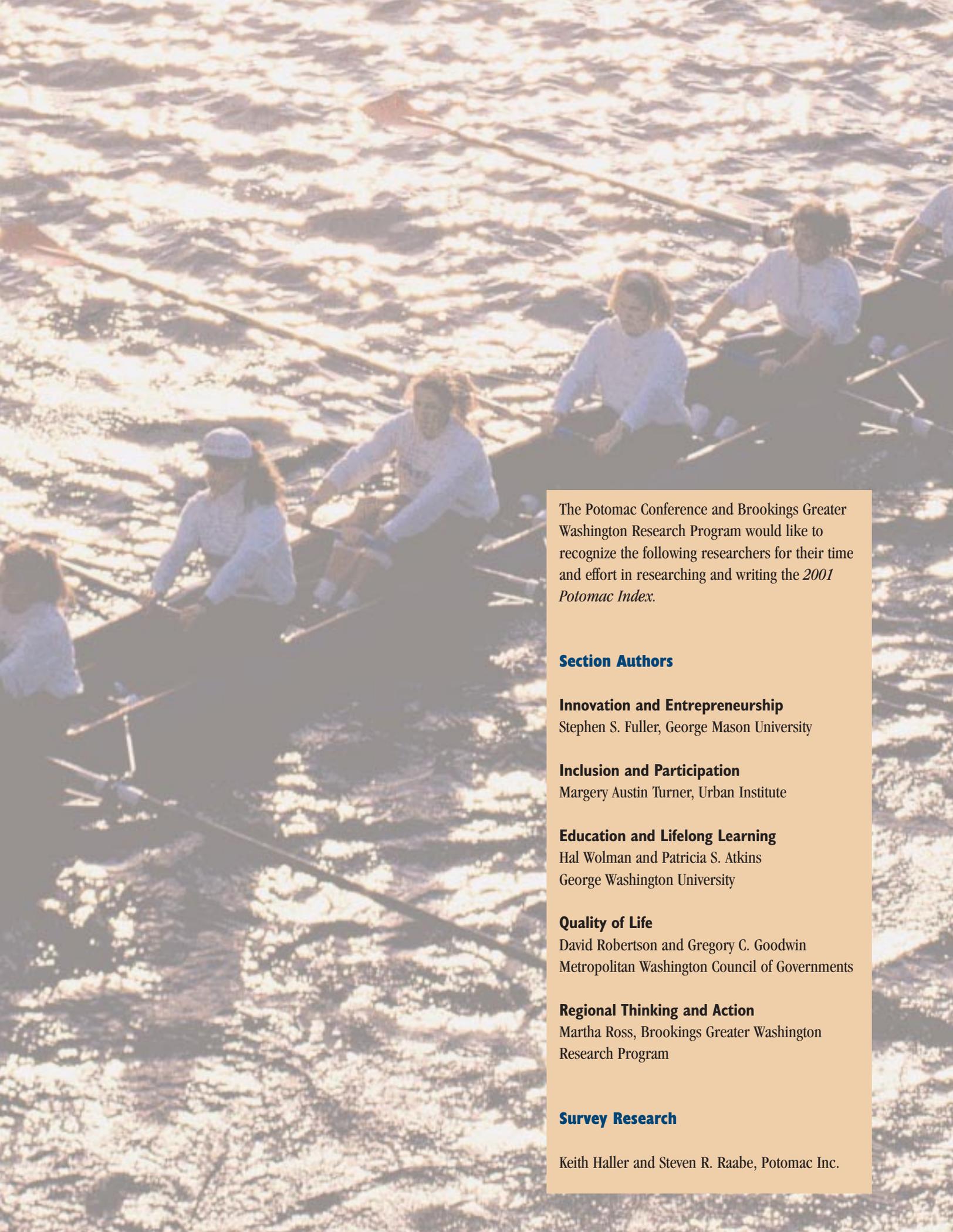
Greater Washington Region Adult Population Survey: August 2001 and November 2001.

33. Interest in Regional Action on Transportation Issues

Greater Washington Region Adult Population Survey: August 2001 and November 2001.

34. Local Intergovernmental Cooperation

Survey of Intergovernmental Agreements, August 2001.



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