

C. Market Size and Trends

Jurisdiction	Average Travel Time to Work (in minutes)	Residents Who Work in Own County	Workers Commuting Into the County	Workers Commuting Out of the County	Net Workers Commuting Into/ Out of the County
Baltimore City	31.1	154,463	187,535	94,910	92,625
Anne Arundel County	28.9	144,033	81,082	111,825	-30,743
Baltimore County	27.6	196,917	144,759	176,579	-31,820
Harford County	31.6	57,973	17,793	53,731	-35,938

Source: US Census

While the economy of metropolitan Baltimore has grown greatly over the last few decades, the City’s economic growth has not kept pace. Like many other struggling cities, Baltimore has been losing ground to its suburban competitors in terms of its share of regional job growth. The City must work to strengthen its position as the core of the region’s economy. Part of the reason for this trend is the fact that as middle-class City residents fled to the suburbs, employers often moved to be closer to the workers. This has led to a situation where many City residents (and even the most mobile of them), are often forced to work outside city limits. In 2005, it was estimated that 154,463 workers were living and working in Baltimore City, while 94,910 City residents worked outside the City. Current projections also suggest that the Baltimore region may well increase its employment totals by 50% by 2030. If the City, however, does not capture a more proportionate share of this regional growth, it will be in the unenviable position of having most of its residents forced to commute outside of the City limits to earn an income.

The port has been an enduring source of strength in this job market, supplying roughly 15,700 direct jobs with an average wage of \$59,000 in 2002. In addition, the Port supported an estimated 83,000 induced jobs in trades and services sustained by spending of the direct employees, and 8,900 indirect jobs sustained by the business purchases of direct employers in the Port. The total 33,000 direct, indirect and induced employees generated roughly \$216 million in State and local taxes in 2002. Faced with increasing competition for other desired uses along the waterfront the City has been and must continue taking action to preserve and enhance this major driving force in our economy.

To further strengthen the City’s economic role in the regional economy, the City has targeted six growth areas, in addition to our existing port-related services, in strengthening our overall economy. These “growth sectors” were identified on the basis of their a) wage potential, b) appropriateness for Baltimore’s workforce, and c) relation to existing strengths and identified

	Percentage of Employed Residents Who Work in Own County	Percentage of County Jobs Held by Residents
Baltimore City	61.90%	45.20%
Anne Arundel County	56.30%	64.00%
Baltimore County	52.70%	57.60%
Harford County	51.90%	76.50%

Source: Maryland Department of Planning

growth potential in the broader state and national contexts. This focused strategy will supplement the existing strength that resides in our port infrastructure, to build a more viable future for the current and future citizens of Baltimore.

D. Location

Baltimore's location along the Eastern Seaboard in the Mid-Atlantic region is a tremendous asset to the City's economy. The advantages of Baltimore's location are heightened by the extensive transportation network that serves the City, including a water, road and rail transportation network in which the Port again plays an integral role. This infrastructure, combined with the location, make the area important for manufacturing, warehousing and distribution businesses across the Mid-Atlantic and East Coast states. Interstate 95, for example, which stretches from Canada to Miami, helps connect the City to most other major Cities of the East Coast, while we also have strong connections West, via Interstate 70. In addition, the City is served by a major international airport, an extensive freight rail network as well as Amtrak passenger rail service.

Within the region, Baltimore remains the core location for business activity, as it has the area's downtown as well as many important shipping terminals. However, Baltimore's preeminence has been challenged by the trend of decentralization of employment that has been ongoing over a period of more than 50 years. This decentralization can be seen in the fact that in many of the area's suburban counties, workers are more likely to work in their home county or adjacent counties than to commute into the central city.

Beyond transportation advantages, Baltimore's waterfront location is also beneficial in that it provides a natural feature around which new business activities still have numerous opportunities to locate. The fact that Baltimore's waterfront remains a "frontier" that has yet to be fully utilized leaves room for future business innovation as the waterfront redevelops and its image is remade.

E. Competition

1. National and International - Baltimore's main competitors at the larger geographic scale are the other East Coast ports (Halifax, Boston, New York, Philadelphia, Norfolk, Savannah, Jacksonville, and Miami); the world's major medical and biotechnology centers, tourist destinations as well as other places that specialize in the industries in which Baltimore hopes to compete.

The Port of Baltimore is a major player at the national and international level, and has been designated number one in the nation (in the early years of 2000) for roll on/roll off cargo. This includes a broad array of construction and farm machinery, as well as trucks and automobiles. Among North Atlantic Coast ports the Port also ranked second in the import of forest products, and third in overall import and export of automobiles.

2. Regional - At the regional level, Baltimore competes with many other metropolitan areas of similar size in the mid-Atlantic Region, stretching from Norfolk to New York City. Baltimore's relatively low cost for office space makes it competitive with most urban areas in the region. Downtown office