



RESEARCH REPORT

A publication providing statistical information on Howard County demographics, socioeconomic and employment trends and patterns. Available from the Department of Planning and Zoning by calling (410) 313-4370.

Howard County Employment Growth – 1990 to 2000

Introduction

The Department of Planning and Zoning (DPZ) typically updates its employment database every five years. This update results in a comprehensive list of current at place employment *by location* in Howard County. It is primarily used as a basis for small area employment projections as part of the Baltimore Metropolitan Council (BMC) cooperative forecasting effort, which in turn is used for regional transportation modeling. Research Report Issue 2 provided an overview of 2000 employment in Howard County. ***This current report discusses job growth in the County from 1990 to 2000 based on data from the five year updates.*** Special consideration is given to the geographic concentration and types of new jobs that came to the County over the decade.

Background and Methodology

As indicated in Research Report 2, the State Department of Labor, Licensing and Regulation (DLLR) and the U.S. Bureau of Economic Analysis (BEA) track jobs on a regular basis. However, jobs by location within counties are not readily available through these sources. Rather, only total countywide job estimates are provided. For that reason, to obtain jobs by location other data sources must be used.

For 1990, a Master Establishment File (MEF) was provided by the Baltimore Metropolitan Council. Based on Maryland State income tax and withholding information, this MEF file contained the employers, number of employees, the Standard Industrial Classification (SIC) code and the location of the employment site by Census Tract and Block. This file was consolidated by statistical areas, and employees were distributed by major employment category.¹ An increment was added to each statistical area based on population to equal the 1990 BEA estimate of 106,262 jobs which also includes the self-employed and others not included in the MEF.

For 1995, Dunn and Bradstreet data was used as a base to determine employment by location. This file, purchased by BMC, was modified, corrected and updated by BMC and DPZ. Similar

¹ The Research Division has broken the County into 127 statistical areas for demographic, land use, and employment reporting purposes. These areas have evolved over time and roughly correspond to Census boundaries.

to the 1990 MEF, DPZ distributed the data into major employment categories by location and estimated additional employment to correct for the difference between the total number of jobs listed in the file and the total employment as estimated at that time by the Maryland Office of Planning (123,600 jobs).

Please refer to Research Report Issue 2 regarding the methodology in determining the base job levels by location for the latest 2000 employment update.

Total Employment

The first table below shows the employment totals for 1990, 1995 and 2000. The second table shows the incremental growth over five year periods as well as the total growth over the decade. There were 106,262 jobs in Howard County in 1990. By 1995 the total was 123,600 jobs, an increase of about 17,300 jobs. In 2000, the estimated total was 160,000, a five year increase of 36,400 jobs, about double the 1990 to 1995 job growth amount. Over the entire decade from 1990 to 2000, close to 54,000 jobs were created in Howard County. This represents about a 50 percent growth rate and is an average of 5,400 new jobs per year.

The share of total jobs among the four Development Monitoring System (DMS) employment areas in the County remained relatively consistent from 1990 to 2000. (See Map 1 on Page 4 for a delineation of these areas.) About half of the Countywide jobs are located in Columbia, one quarter in the I-95 Corridor, 15 percent in Ellicott City and the remaining 10 percent in the West. Over the decade, Columbia received about 30,900 new jobs and the I-95 Corridor had an additional 14,400 new jobs. This is followed by Ellicott City and the West with about 4,800 and 3,600 new jobs, respectively. The charts on the next page shows these results graphically.

Total Jobs by Employment Area -- 1990 to 2000

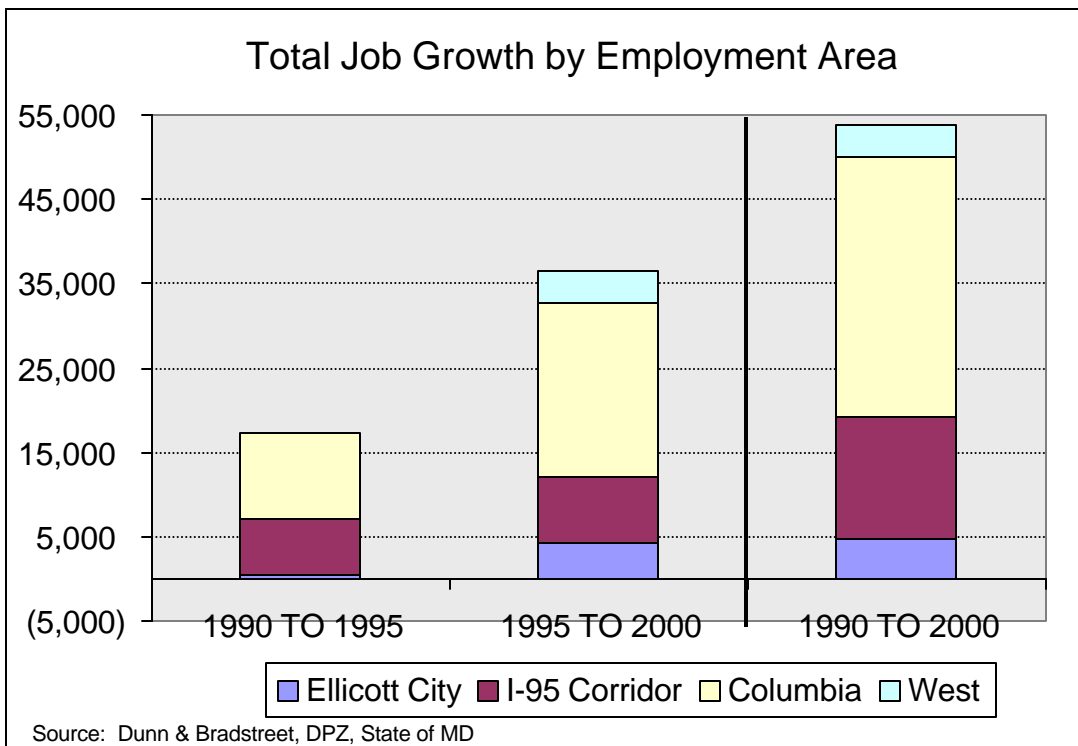
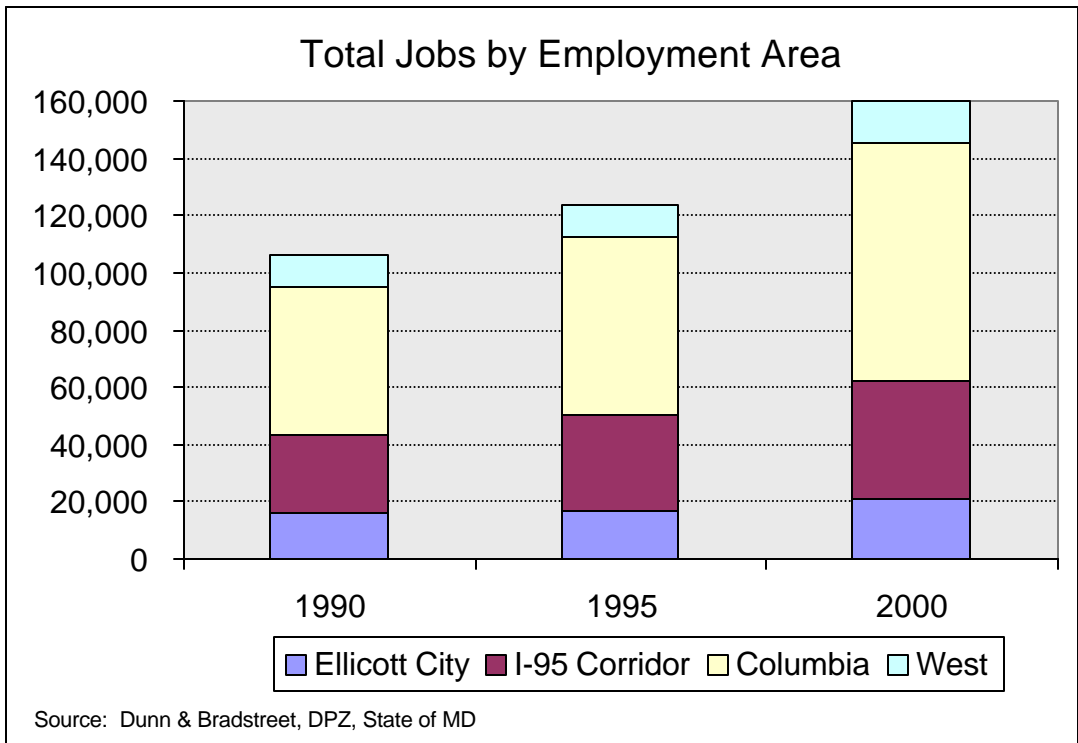
DMS Area	1990		1995		2000	
	Jobs	Percent	Jobs	Percent	Jobs	Percent
Ellicott City	16,285	15%	16,813	14%	21,063	13%
I-95 Corridor	26,727	25%	33,357	27%	41,155	26%
Columbia	51,939	49%	62,174	50%	82,845	52%
West	11,311	11%	11,256	9%	14,937	9%
Total	106,262	100%	123,600	100%	160,000	100%

Source: Dunn & Bradstreet, Howard County DPZ, State of MD

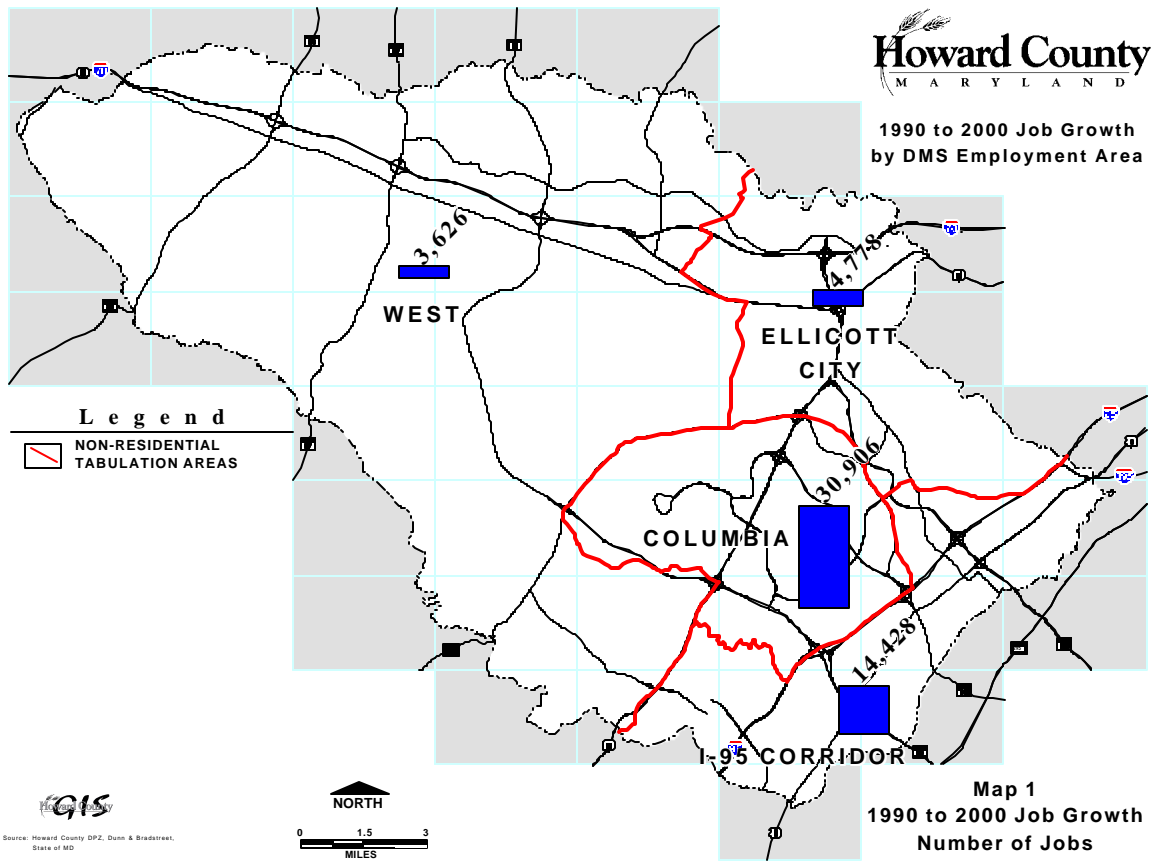
Total Job Growth by Employment Area -- 1990 to 2000

DMS Area	1990 to 1995		1995 to 2000		1990 to 2000	
	Jobs	% Growth	Jobs	% Growth	Jobs	% Growth
Ellicott City	528	3%	4,250	25%	4,778	29%
I-95 Corridor	6,630	25%	7,798	23%	14,428	54%
Columbia	10,235	20%	20,671	33%	30,906	60%
West	(55)	0%	3,681	33%	3,626	32%
Total	17,338	16%	36,400	29%	53,738	51%

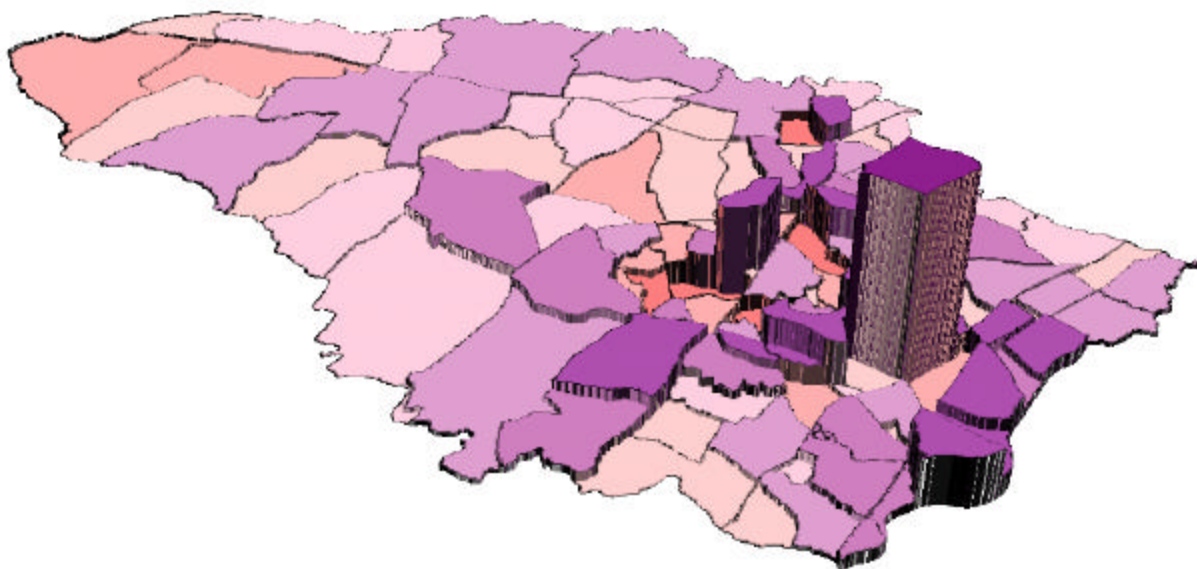
Source: Dunn & Bradstreet, Howard County DPZ, State of MD



The maps on the next page shows the ten year job growth in Howard County. The first map shows the overall growth by each of the DMS employment areas. The second *prism* map shows the extent of this employment growth by smaller statistical area.



Map 2 – Howard County Employment Growth, 1990 to 2000



Source: Dunn & Bradstreet, DPZ, State of MD

The prism map clearly shows that the most significant growth occurred in the Columbia Gateway Business Park located southwest of the I-95 and MD 175 interchange. In fact, about 25 percent, or 13,300 of the total 53,700 net new jobs in Howard County over the decade, were located in Columbia Gateway. Other growth areas include Columbia Town Center, the Oakland Ridge Industrial Park (in north Columbia), the Guilford Industrial Park and surrounding areas (in south Columbia) and areas along the I-95 Corridor primarily east of Route 1. Note that the statistical areas shown in shades of red/orange had a net decrease in jobs.

Employment by Job Type – 1990, 1995 & 2000

The tables below show the employment broken down by *job type* for 1990, 1995 and 2000.

1990 Jobs by Employment Area by Job Type

DMS Area	Retail	Service	FIRE (1)	Govt. & Inst.	Manufac-turing	Extensive Industrial	TOTAL	
Ellicott City	3,909	3,255	2,016	3,581	419	3,105	16,285	15%
I-95 Corridor	3,507	3,538	1,363	2,199	3,197	12,923	26,727	25%
Columbia	9,497	13,315	5,270	8,639	5,172	10,046	51,939	49%
West	682	5,112	948	1,287	177	3,105	11,311	11%
Total	17,595	25,220	9,597	15,706	8,965	29,179	106,262	100%
Percent	17%	24%	9%	15%	8%	27%	100%	

(1) Finance, Insurance, and Real Estate

Source: *State of MD, DPZ*

1995 Jobs by Employment Area by Job Type

DMS Area	Retail	Service	FIRE (1)	Govt. & Inst.	Manufac-turing	Extensive Industrial	TOTAL	
Ellicott City	5,074	3,049	1,480	4,525	715	1,970	16,813	14%
I-95 Corridor	4,581	4,591	660	2,119	4,591	16,815	33,357	27%
Columbia	10,624	17,179	7,094	11,915	3,557	11,805	62,174	50%
West	1,121	4,669	394	2,066	105	2,901	11,256	9%
Total	21,400	29,488	9,628	20,625	8,968	33,491	123,600	100%
Percent	17%	24%	8%	17%	7%	27%	100%	

(1) Finance, Insurance, and Real Estate

Source: *Dunn & Bradstreet, DPZ*

2000 Jobs by Employment Area by Job Type

DMS Area	Retail	Service	FIRE (1)	Govt. & Inst.	Manufac-turing	Extensive Industrial	TOTAL	
Ellicott City	5,690	5,369	1,587	5,424	603	2,390	21,063	13%
I-95 Corridor	5,550	6,550	704	3,256	5,640	19,455	41,155	26%
Columbia	11,750	28,002	8,218	13,974	7,013	13,888	82,845	52%
West	1,510	6,392	357	2,646	217	3,815	14,937	9%
Total	24,500	46,313	10,866	25,300	13,473	39,548	160,000	100%
Percent	15%	29%	7%	16%	8%	25%	100%	

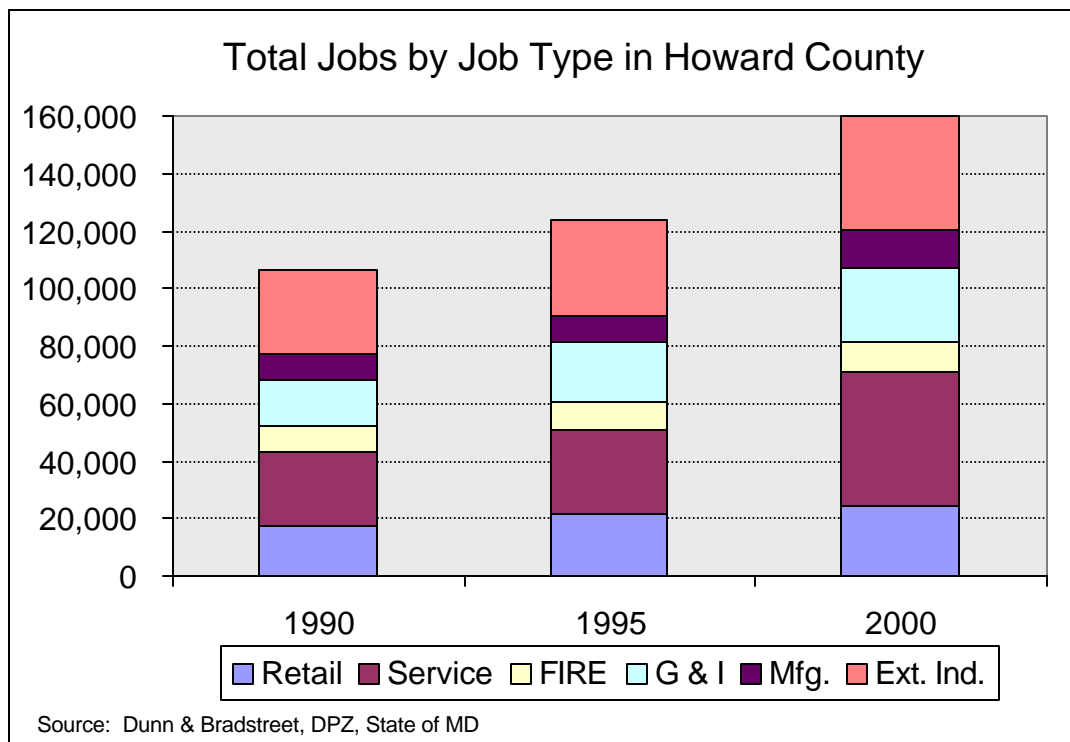
(1) Finance, Insurance, and Real Estate

Source: *Dunn & Bradstreet, DPZ*

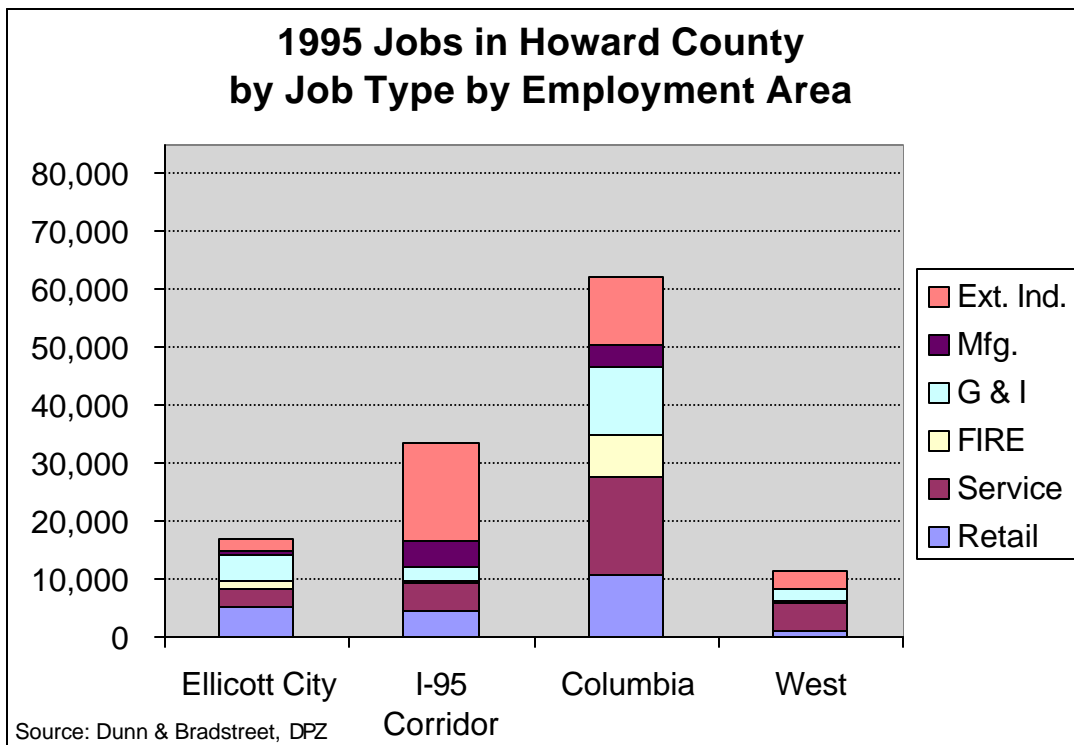
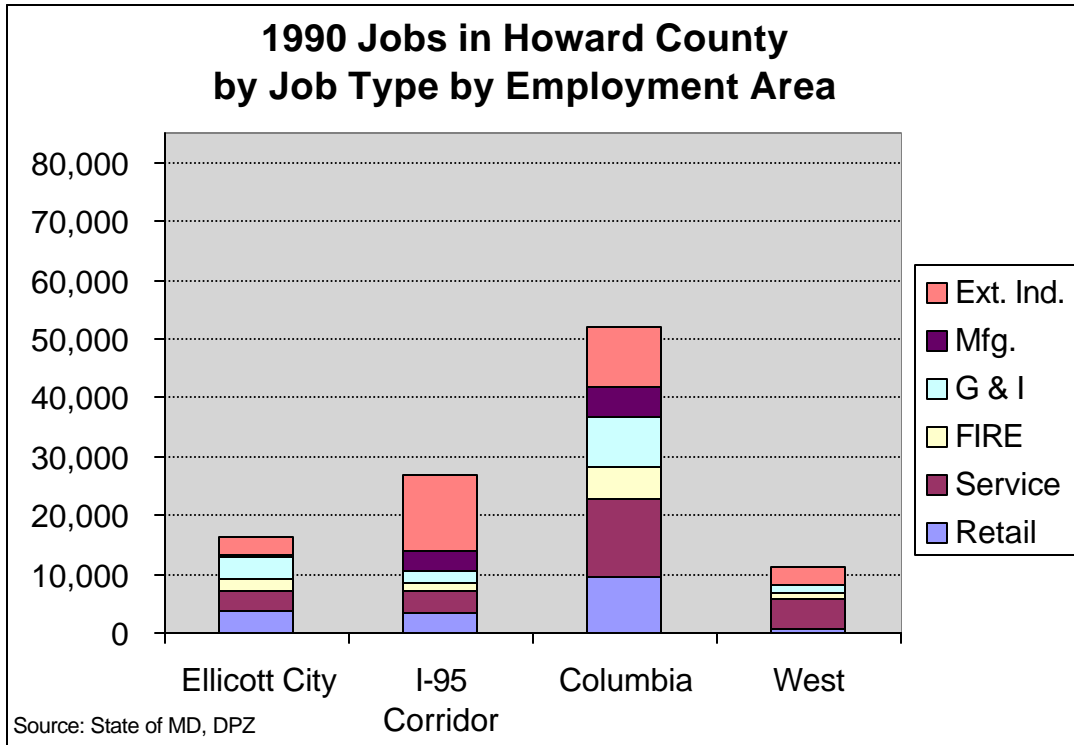
In general, the share of jobs by type has remained relatively consistent since 1990. In 1990, 17 percent of all jobs were in the retail sector. By 2000, this percentage drops only slightly to 15 percent. Service jobs represented 24 percent of total jobs in 1990 increasing to 29 percent by 2000. This increase in the service sector is consistent with statewide and national trends. The service category includes personal and business services, hotels, auto and other repair services, legal and engineering services, among other jobs.

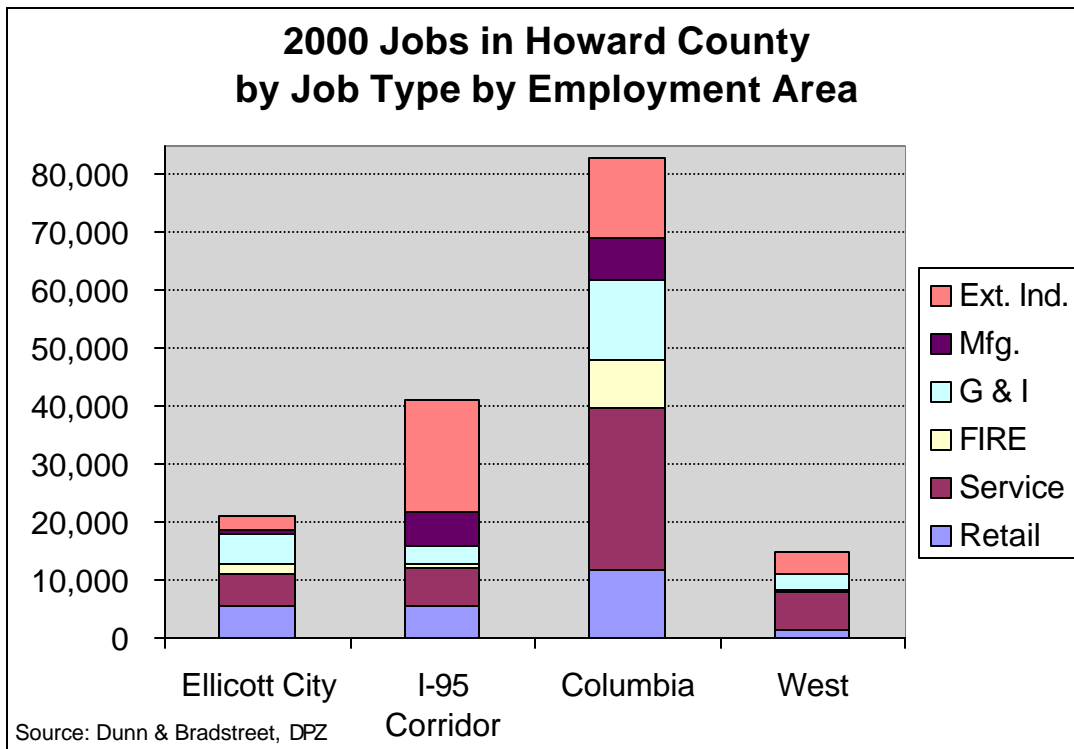
The finance, insurance and real estate sector decreased slightly from 9 percent of all jobs in 1990 to 7 percent in 2000. Government and institutional jobs increased only one percentage point, from 15 percent in 1990 to 16 percent in 2000. Manufacturing jobs remained the same at 8 percent of total jobs in both 1990 and 2000, although there was a slight dip in percentage in 1995. The last category, extensive industrial, represented 27 percent of total jobs in 1990 compared to a lower 25 percent in 2000. This category, the second largest after service jobs in 2000, includes construction, transportation and public utilities, warehousing, agricultural, forestry, and mining jobs. (The Appendix at the end of this report on Page 17 shows the detailed groupings by Standard Industrial Classification (SIC) for each of the six job categories listed in the tables.)

The chart below summarizes the total jobs by job type in Howard County for the three time periods. It is clear from this chart that all job sectors have seen an increase in employment, with the service sector experiencing the most growth over the decade.



The charts below show the employment broken down by job type for 1990, 1995 and 2000 – a graphical representation of the three tables on Page 5.





As indicated in Research Report Issue 2, which provided an overview of employment in 2000, the Howard County job base is diverse and covers a broad spectrum of manufacturing, service, retail, government, institutional and other industries. This diversity helps protect the County against adverse impacts during national or regional economic downturns. As a case in point, the impact of the latest national recession beginning in March 2001, has not been as sharply felt in Howard County compared to other parts of the country.

Employment by Job Type – 1990 to 2000 Growth

The tables below show the change in jobs by job type for each employment area. The first table shows the changes from 1990 to 1995, the second table from 1995 to 2000 and the third table from 1990 to 2000. Numbers in red indicated job declines.

1990 to 1995 Job Growth by Employment Area by Job Type

DMS Area	Retail	Service	FIRE (1)	Govt. & Inst.	Manufac- turing	Extensive Industrial	TOTAL	
Ellicott City	1,165	(206)	(536)	944	296	(1,135)	528	3.0%
I-95 Corridor	1,074	1,053	(703)	(80)	1,394	3,892	6,630	38.2%
Columbia	1,127	3,864	1,824	3,276	(1,615)	1,759	10,235	59.0%
West	439	(443)	(554)	779	(72)	(204)	(55)	-0.3%
Total	3,805	4,268	31	4,919	3	4,312	17,338	100.0%
Percent	21.9%	24.6%	0.2%	28.4%	0.0%	24.9%	100.0%	

(1) Finance, Insurance, and Real Estate

Source: State of MD, Dunn & Bradstreet, DPZ

1995 to 2000 Job Growth by Employment Area by Job Type

DMS Area	Retail	Service	FIRE (1)	Govt. & Inst.	Manufac-turing	Extensive Industrial	TOTAL	
Ellicott City	616	2,320	107	899	(112)	420	4,250	11.7%
I-95 Corridor	969	1,959	44	1,137	1,049	2,640	7,798	21.4%
Columbia	1,126	10,823	1,124	2,059	3,456	2,083	20,671	56.8%
West	389	1,723	(37)	580	112	914	3,681	10.1%
Total	3,100	16,825	1,238	4,675	4,505	6,057	36,400	100.0%
Percent	8.5%	46.2%	3.4%	12.8%	12.4%	16.6%	100.0%	

(1) Finance, Insurance, and Real Estate

Source: Dunn & Bradstreet, DPZ

1990 to 2000 Job Growth by Employment Area by Job Type

DMS Area	Retail	Service	FIRE (1)	Govt. & Inst.	Manufac-turing	Extensive Industrial	TOTAL	
Ellicott City	1,781	2,114	(429)	1,843	184	(715)	4,778	8.9%
I-95 Corridor	2,043	3,012	(659)	1,057	2,443	6,532	14,428	26.8%
Columbia	2,253	14,687	2,948	5,335	1,841	3,842	30,906	57.5%
West	828	1,280	(591)	1,359	40	710	3,626	6.7%
Total	6,905	21,093	1,269	9,594	4,508	10,369	53,738	100.0%
Percent	12.8%	39.3%	2.4%	17.9%	8.4%	19.3%	100.0%	

(1) Finance, Insurance, and Real Estate

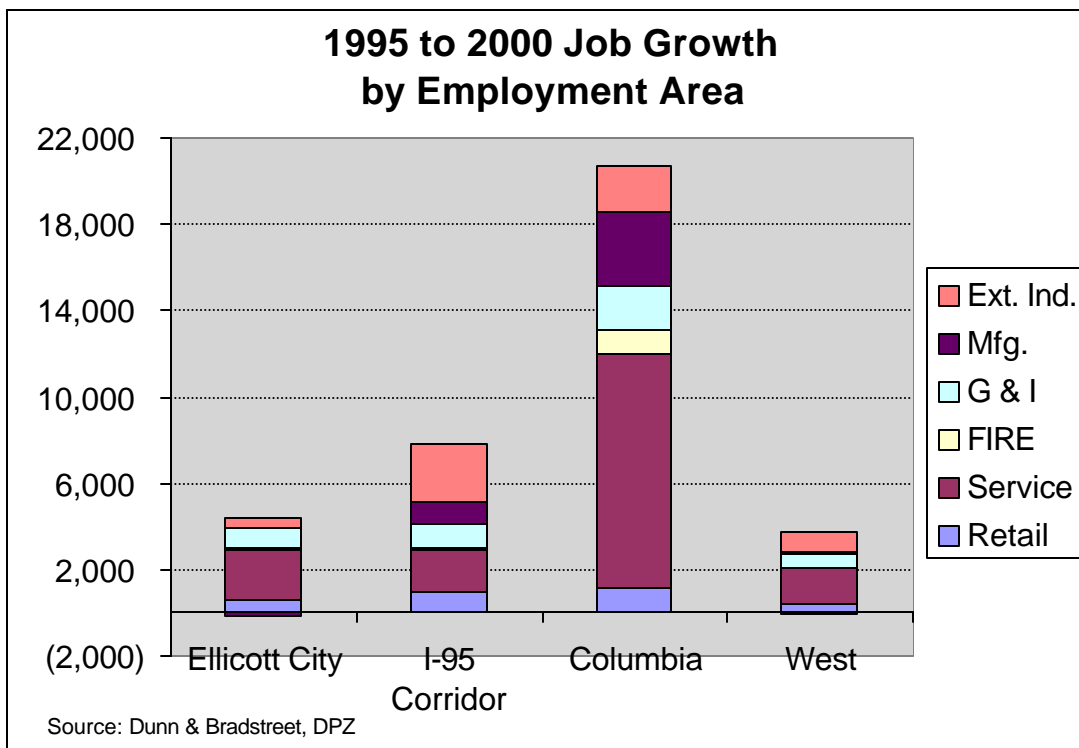
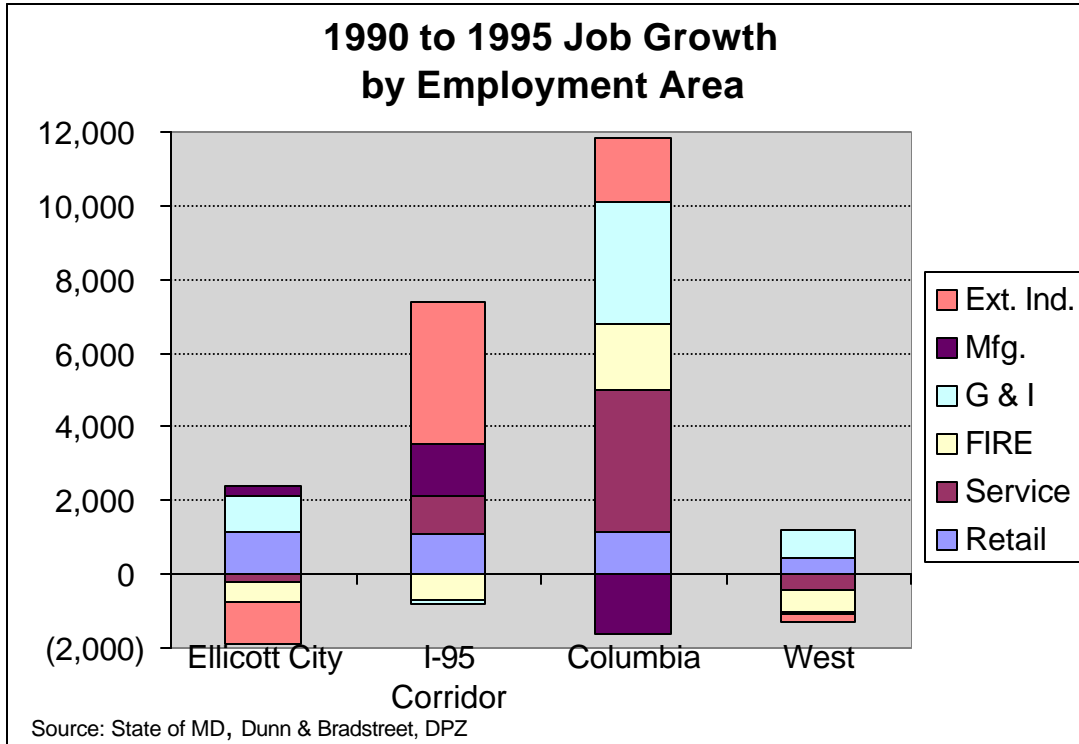
Source: Dunn & Bradstreet, State of MD, DPZ

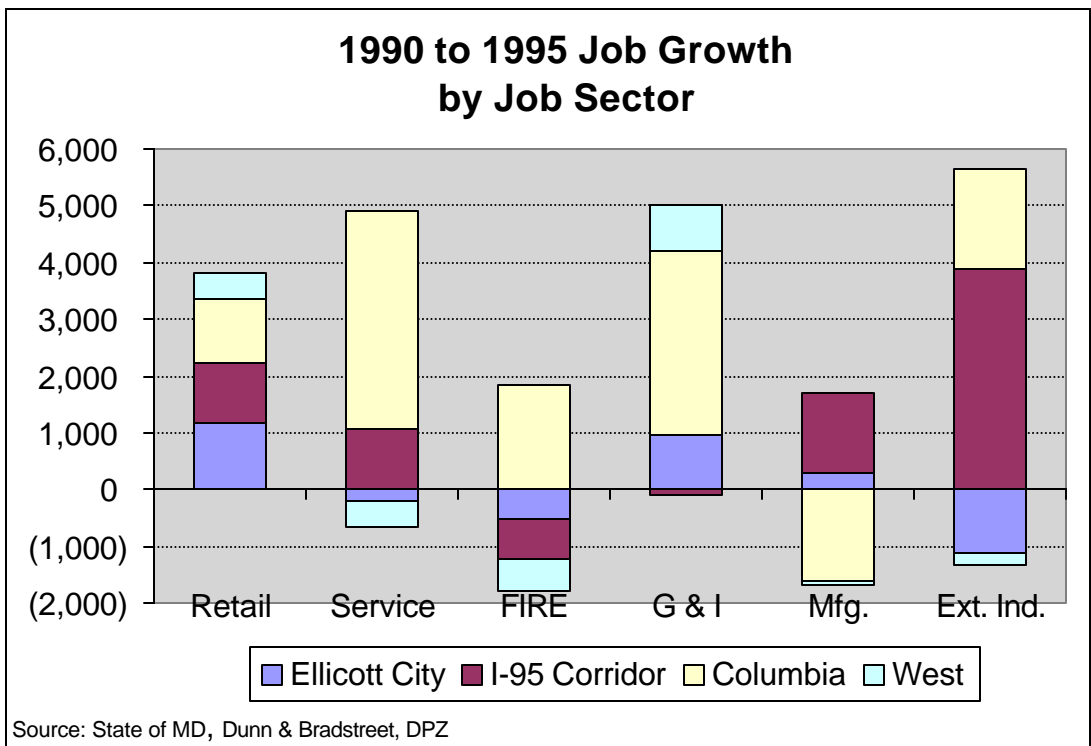
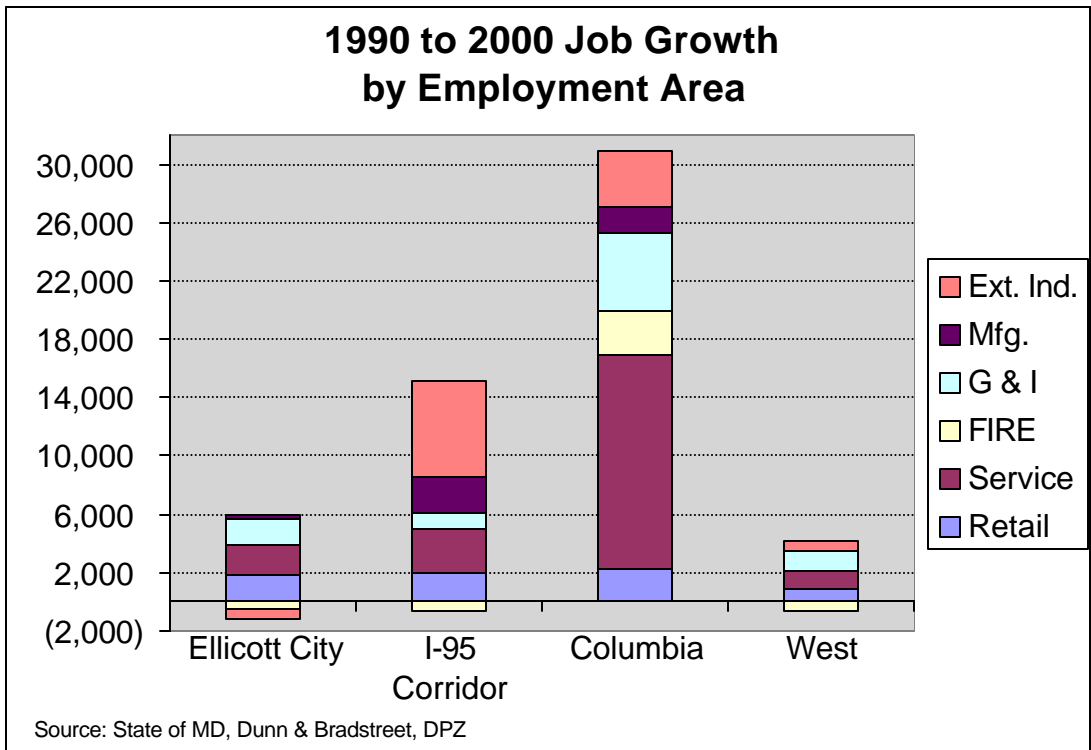
Although growth occurred in all job sectors over the decade *at the countywide level*, for particular subareas within the County there were job declines in some sectors. This was particularly the case from 1990 to 1995, most likely due to the recession of the early 1990's and the associated economic restructuring. As indicated in the first table above, the biggest five year declines occurred in the manufacturing sector in Columbia and the extensive industrial sector in Ellicott City. The finance, insurance and real estate (FIRE) sector also had notable declines in Ellicott City, the I-95 Corridor and the West. The growth of this sector in Columbia, however, compensated for these losses resulting in a net increase of 31 FIRE jobs countywide. There was also a decline in service sector jobs in the West and Ellicott City. A relatively large increase of service sector jobs in Columbia and the I-95 Corridor more than compensated for these losses, however.

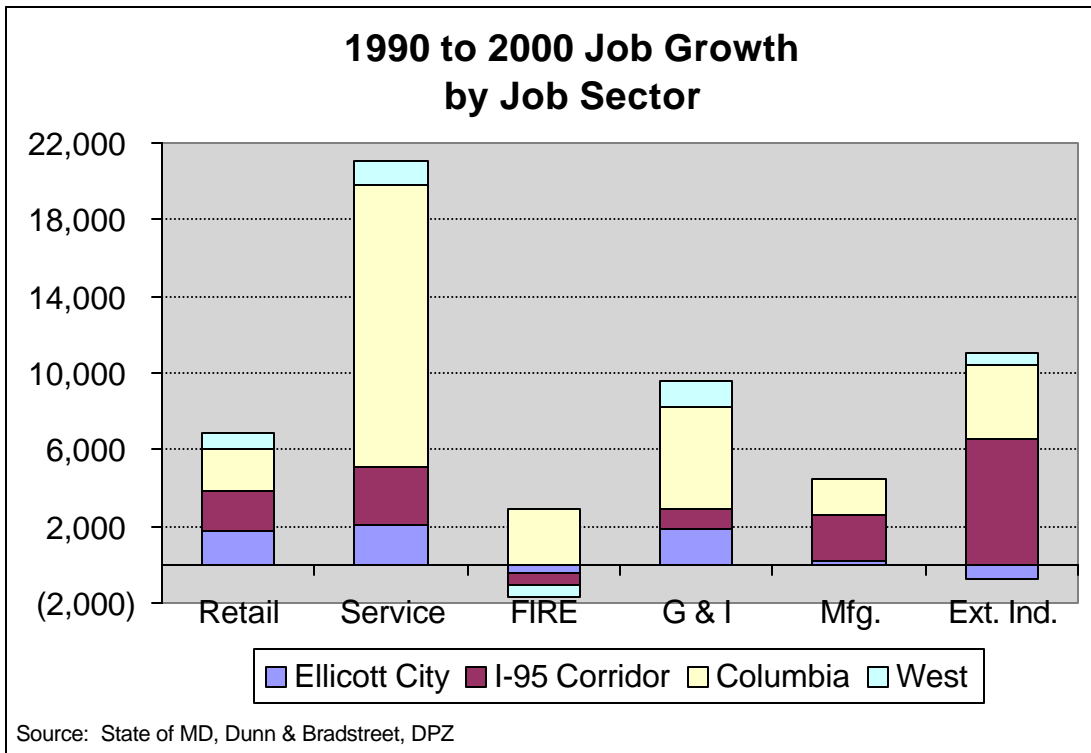
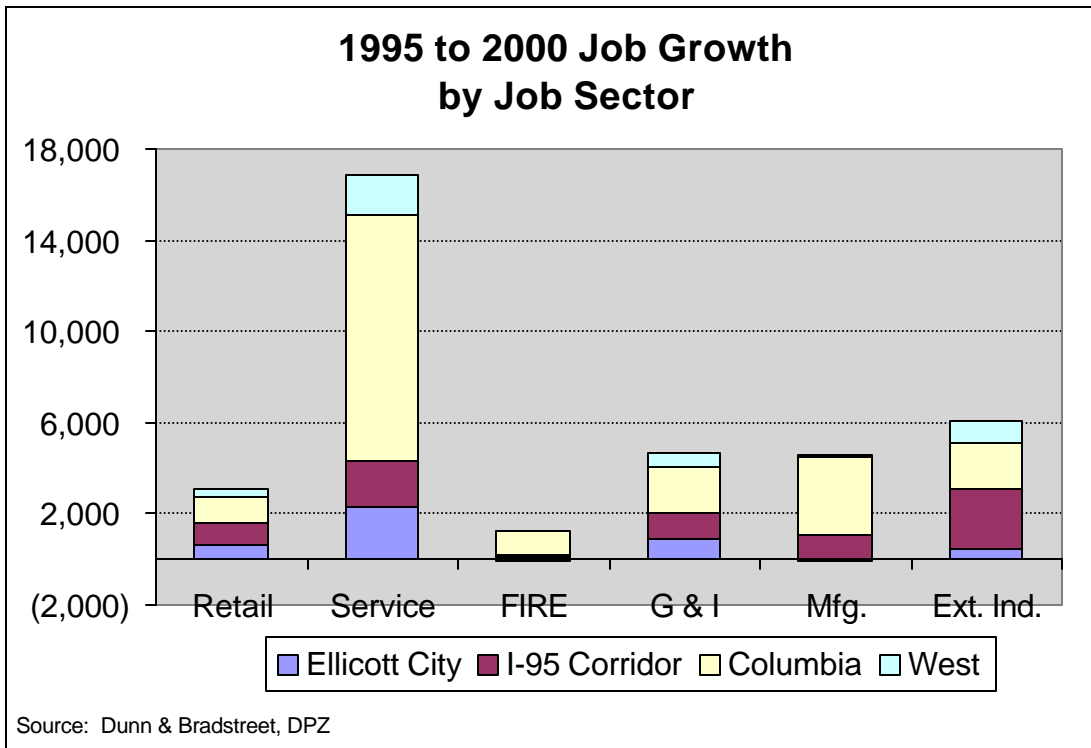
From 1995 to 2000, there were only two areas that had minor losses – Ellicott City lost some manufacturing jobs and the West lost some FIRE jobs. The most significant job increases occurred in Columbia with close to 10,800 new service jobs, more than half of Columbia's job growth over that period and about 30 percent of the total countywide job growth. Overall, there was an increase of 16,825 service jobs in the County from 1995 to 2000, the most of any sector.

For the entire decade from 1990 to 2000, the most apparent change in terms of losses and gains was the shift of FIRE jobs out of the I-95 Corridor, Ellicott City and the West, where there was a combined loss of 1,679 jobs, and into Columbia which saw a gain of 2,948 FIRE jobs. The net results was a gain of 1,269 FIRE jobs countywide. Ellicott City also experienced a net loss of 715 extensive industrial jobs over the decade, although had a net increase of 4,778 new jobs made up by the remaining sectors.

The changes discussed above are shown graphically in the charts below. The first three charts show the results *by employment area* along the horizontal axis. The next three charts allow a different comparison inverting the results by showing them *by job sector* along the horizontal axis.

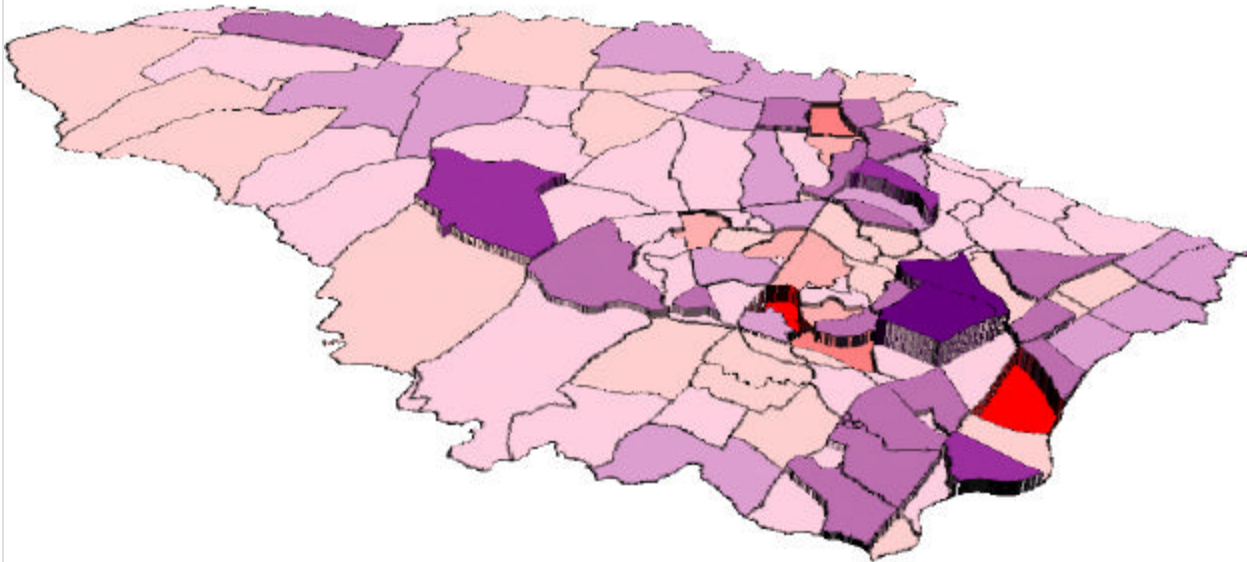






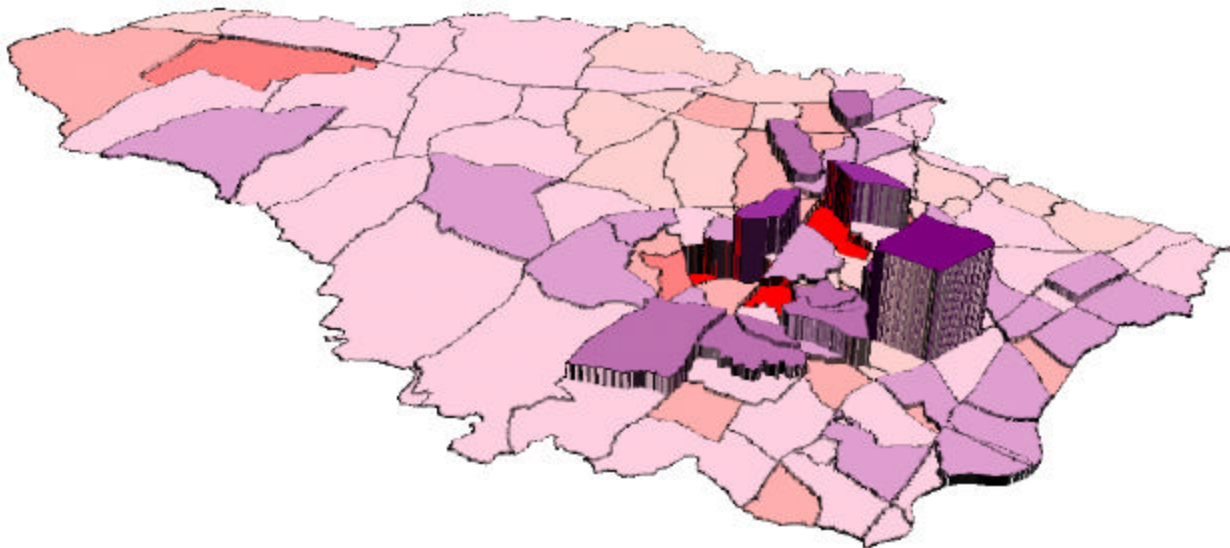
The prism maps below depict the change in employment from 1990 to 2000 by smaller statistical area for *each job sector*. Similar to Map 2 on Page 4, which showed the net change in total jobs, shades of red/orange on the maps below represent a net decrease in jobs (or no change in the case of zero employment) and shades of purple indicate where there was a net increase in jobs.

Map 3 – Howard County Retail Job Growth, 1990 to 2000



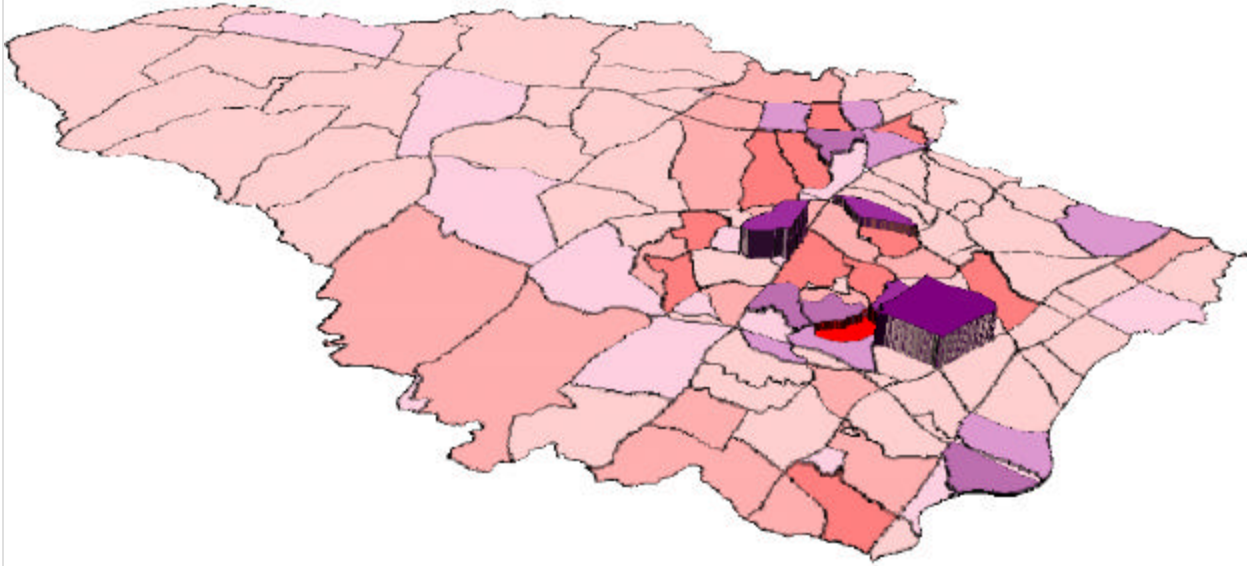
Source: Dunn & Bradstreet, DPZ, State of MD

Map 4 – Howard County Service Job Growth, 1990 to 2000



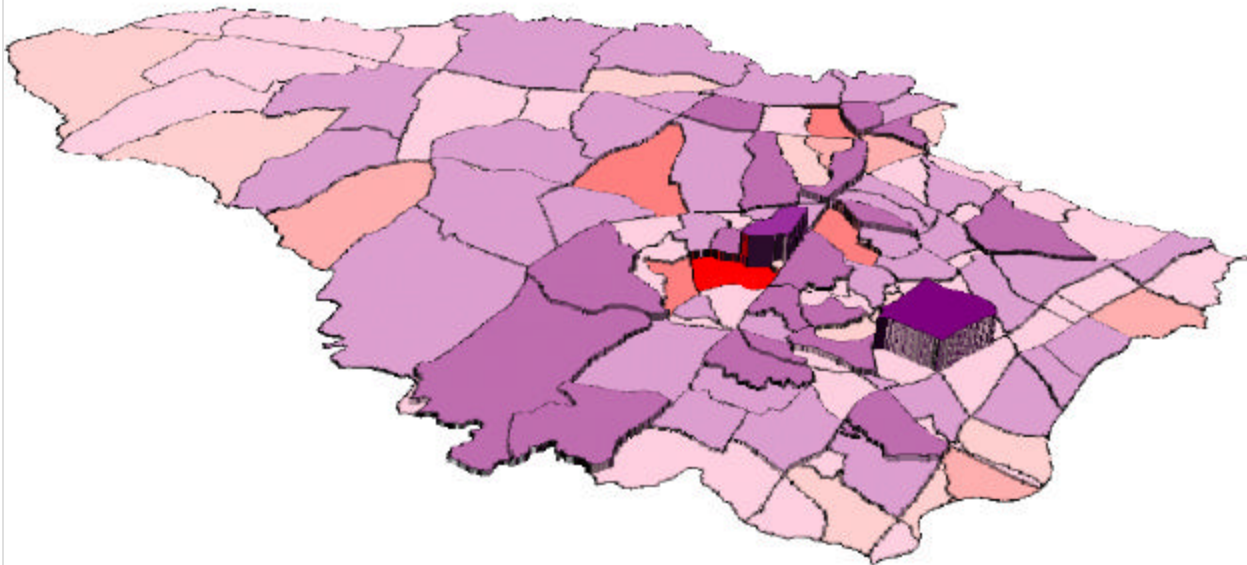
Source: Dunn & Bradstreet, DPZ, State of MD

Map 5 – Howard County FIRE Job Growth, 1990 to 2000



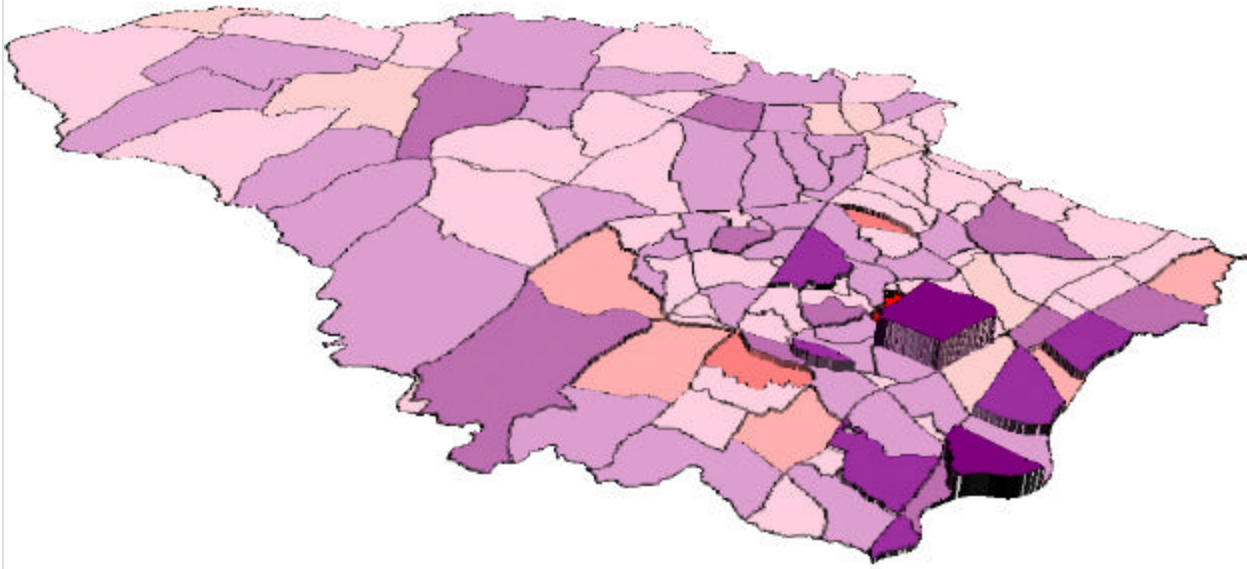
Source: Dunn & Bradstreet, DPZ, State of MD

Map 6 – Howard County Govt. & Inst. Job Growth, 1990 to 2000



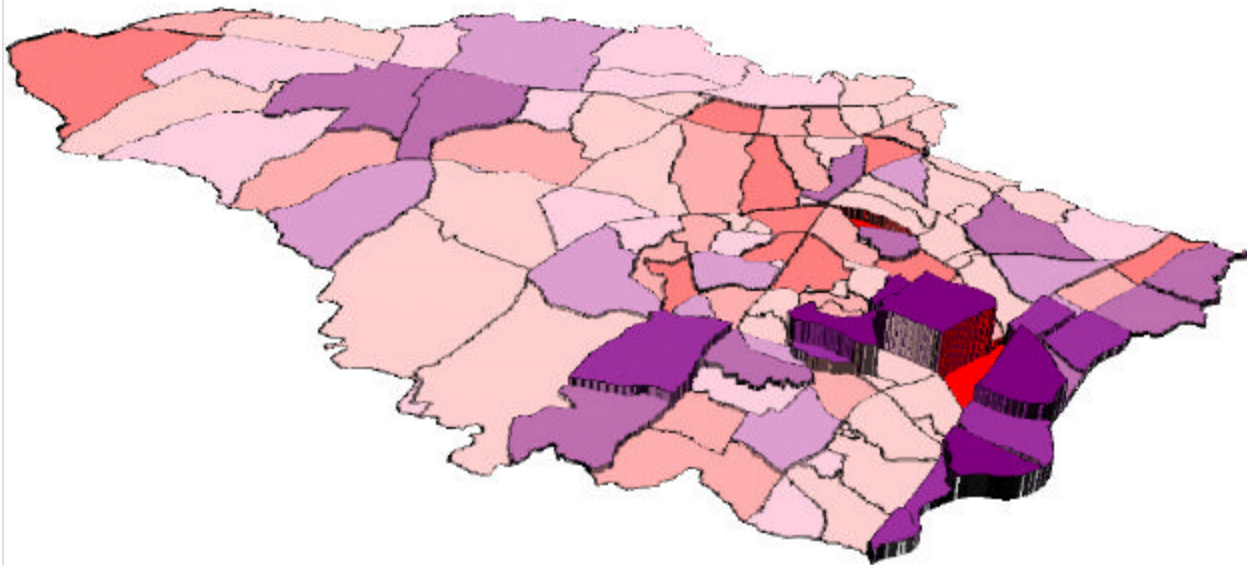
Source: Dunn & Bradstreet, DPZ, State of MD

Map 7 – Howard County Manufacturing Job Growth, 1990 to 2000



Source: Dunn & Bradstreet, DPZ, State of MD

Map 8 – Howard County Extensive Industrial Job Growth, 1990 to 2000



Source: Dunn & Bradstreet, DPZ, State of MD

Closing Thoughts

As indicated in Research Report Issue 2, the job base in Howard County continues to be strong. The growth achieved over the last decade with the addition of close to 54,000 jobs has strengthened and diversified the County's tax base and economy as a whole. The strong diversity in jobs with a particular focus and growth in contemporary service related jobs has helped create a positive cycle of opportunity and prosperity. With continued foresight and proactive planning the County is in a strong position to maintain and build upon its diverse job base.

Appendix – Detailed Employment Groupings

The table below summarizes the employment categories discussed in this report. The detailed industries are listed below each of the six major categories.

SIC Code	RETAIL	SIC Code	MANUFACTURING
52	Building Materials and Garden Supplies	20	Food and Kindred Products
53	General Merchandise Stores	21	Tobacco Products
54	Food Stores	22	Textile Mill Products
55	Automotive Dealers & Service Stations	23	Apparel and Other Textile Products
56	Apparel and Accessory Stores	24	Lumber and Wood Products
57	Furniture and Homefurnishings Stores	25	Furniture and Fixtures
58	Eating and Drinking Places	26	Paper and Allied Products
59	Miscellaneous Retail	27	Printing and Publishing
SIC Code	SERVICE	28	Chemicals and Allied Products
70	Hotels and Other Lodging Places	29	Petroleum and Coal Products
72	Personal Services	30	Runner and Misc. Plastics Products
73	Business Services	31	Leather and Leather Products
75	Auto Repair, Services, and Parking	32	Stone, Clay, and Glass Products
76	Miscellaneous Repair Services	33	Primary Metal Industries
78	Motion Pictures	34	Fabricated Metal Products
79	Amusement and Recreation Services	35	Industrial Machinery and Equipment
81	Legal Services	36	Electronic and Other Electric Equipment
82	Educational Services	37	Transportation Equipment
87	Engineering and Management Services	38	Instruments and Related Products
88	Private Households	39	Miscellaneous Manufacturing Products
89	Services, NEC	SIC Code	EXTENSIVE INDUSTRIAL
SIC Code	FINANCE, INSUR., & REAL ESTATE	01	Agricultural Production - Crops
60	Depository Institutions	02	Agricultural Production - Livestock
61	Nondepository Institutions	07	Agricultural Services
62	Security and Commodity Brokers	08	Forestry
63	Insurance Carriers	09	Fishing, Hunting, and Trapping
64	Insurance Agents, Brokers & Service	10	Metal Mining
65	Real Estate	12	Coal Mining
67	Holding and Other Investment Offices	13	Oil and Gas Extraction
SIC Code	GOVERNMENT & INSTITUTIONAL	14	Nonmetallic Minerals, Except Fuels
43	U.S. Postal Service	15	General Building Contractors
80	Health Services	16	Heavy Construction, Ex Building
83	Social Services	17	Special Trade Contractors
84	Museums, Botanical, Zoological Gardens	40	Railroad Transportation
86	Memberships and Organizations	41	Local and Interurban Passenger Transit
91	Executive, Legislative, and General	42	Trucking and Warehousing
92	Justice, Public Order, and Safety	44	Water Transportation
93	Finance, Taxation, and Monetary Policy	45	Transportation By Air
94	Administration of Human Resources	46	Pipelines, Except Natural Gas
95	Environmental Quality and Housing	47	Transportation Services
96	Administration of Economic Programs	48	Communications
97	National Security and International Affairs	49	Electric, Gas, and Sanitary Services
		50	Durable Goods
		51	Nondurable Goods

Notes: SIC stands for Standard Industrial Classification, the traditional coding system used by federal, state, and private groups to analyze economic data. Conversion to the new North American Industry Classification System (NAICS) is currently underway by agencies and private data gathering vendors. The new NAICS codes will better classify contemporary industries and businesses.