

HUD PD&R Regional Reports

Region 3: Mid-Atlantic



Quick Facts About Region 3

Wilmington, Delaware

By [Nancy Smith](#) | 1st Quarter 2025

Sales market conditions—

First quarter 2025: mixed (balanced to slightly tight)
Fourth quarter 2024: mixed (balanced to slightly tight)
First quarter 2024: mixed (balanced to slightly tight)

Apartment market conditions—

First quarter 2025: mixed (soft to slightly tight)
Fourth quarter 2024: mixed (soft to slightly tight)
First quarter 2024: mixed (soft to balanced)

Overview

As of the first quarter of 2025, economic growth in the Mid-Atlantic region moderated from a year earlier. Nonfarm payroll jobs increased 0.9 percent, slower than the 1.5-percent rate a year earlier and less than the 1.3-percent rate for the nation, but similar to the average pace of growth for the region during the 2010s. Population growth in the region from 2023 to 2024 accelerated compared with the growth from 2022 to 2023. Home sales market conditions in the region were mixed, ranging from balanced to slightly tight, unchanged from a year ago. Regionwide, home sales declined during the 12 months ending February 2025, although at a slower pace compared with a year ago, and the average home sales price increased at a faster pace compared with the 12 months ending February 2024. Apartment market conditions in the region were mixed as of the first quarter of 2025, ranging from soft to slightly tight, with vacancy rates decreasing in three of the eight metropolitan areas highlighted in this report (CoStar Group).

- As of the first quarter of 2025, 6 of the 11 nonfarm payroll sectors in the region added jobs, led by the education

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and health services sector, which accounted for nearly 72 percent of the net job gains in the region.

- The population of the region increased 0.7 percent from 2023 to 2024, with growth occurring in four of the five states and the District of Columbia (U.S. Census Bureau population estimates as of July 1).

Economic Conditions

As of the first quarter of 2025, the economy in the Mid-Atlantic region expanded from a year ago. Nonfarm payrolls averaged 15.13 million jobs, reflecting an increase of 131,700 jobs, or 0.9 percent, from the first quarter of 2024, slowing from payroll growth of 1.5 percent a year earlier. Although regionwide nonfarm payrolls as of the first quarter of 2025 were 2.5 percent above the level as of the first quarter of 2020, before the most significant impacts of the COVID-19 pandemic, payrolls in the District of Columbia were 4.5 percent below prepandemic levels. Payrolls in Delaware, Maryland, Pennsylvania, Virginia, and West Virginia exceeded prepandemic levels by 5.9, 2.1, 2.2, 4.6, and 0.9 percent, respectively. Job growth in the region as of the first quarter of 2025 was slower than in the nation, where nonfarm payrolls increased 1.3 percent year over year, and jobs were 2.5 percent higher than the level as of the first quarter of 2020.

Job gains in 6 of the 11 nonfarm payroll sectors in the region offset losses in 5 sectors. As of the first quarter of 2025, the education and health services and the transportation and

- As of the first quarter of 2025, construction of sales housing in the region, as measured by the number of single-family homes permitted, decreased 3 percent from the first quarter of 2024, falling in four states and the District of Columbia. However, multifamily building activity increased 15 percent in the region from a year ago, with production rising in three states and the District of Columbia.

utilities sectors led the growth in the region, increasing 3.4 and 1.5 percent, or by 94,800 and 9,900 jobs, respectively. However, growth rates in those sectors were below the national increases of 3.6 and 2.6 percent, respectively. The education and health services sector led the region with the fastest rate of growth and the largest year-over-year job gain, accounting for nearly 72 percent of net job additions in the region. Job gains in the sector occurred in every state in the region and the District of Columbia, with growth ranging from 1.0 percent in the District of Columbia to 4.4 percent in Virginia. By comparison, year-over-year job gains in the transportation and utilities sector occurred in Maryland, Pennsylvania, and Virginia, with increases of 500, 3,900, and 8,400 jobs, or 0.4, 1.2, and 5.1 percent, respectively. Partially offsetting job gains in the region, the professional and business services sector decreased by 8,700 jobs, or 0.4 percent, a slightly faster rate than the 0.3-percent decrease nationally. The largest declines in the sector were in Maryland and Virginia, where the job losses totaled 6,800 and 4,300, or 1.4 and 0.5 percent, respectively.

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Nonfarm payrolls increased in the Mid-Atlantic region year over year as of the first quarter of 2025, led by growth in the education and health services sector.

	First Quarter		Year-Over-Year Change	
	2024 (Thousands)	2025 (Thousands)	Absolute (Thousands)	Percent
Total Nonfarm Payrolls	15,001.1	15,132.8	131.7	0.9
Goods-Producing Sectors	1,729.7	1,721.9	-7.8	-0.5
Mining, Logging, & Construction	739.3	738.6	-0.7	-0.1
Manufacturing	990.4	983.3	-7.1	-0.7
Service-Providing Sectors	13,271.3	13,410.9	139.6	1.1
Wholesale & Retail Trade	1,847.3	1,842.3	-5.0	-0.3
Transportation & Utilities	670.6	680.5	9.9	1.5
Information	226.9	221.9	-5.0	-2.2
Financial Activities	798.5	799.1	0.6	0.1
Professional & Business Services	2,414.9	2,406.2	-8.7	-0.4
Education & Health Services	2,790.3	2,885.1	94.8	3.4
Leisure & Hospitality	1,383.6	1,393.8	10.2	0.7
Other Services	688.9	696.5	7.6	1.1
Government	2,450.2	2,485.6	35.4	1.4

Note: Numbers may not add to totals due to rounding.

Source: U.S. Bureau of Labor Statistics



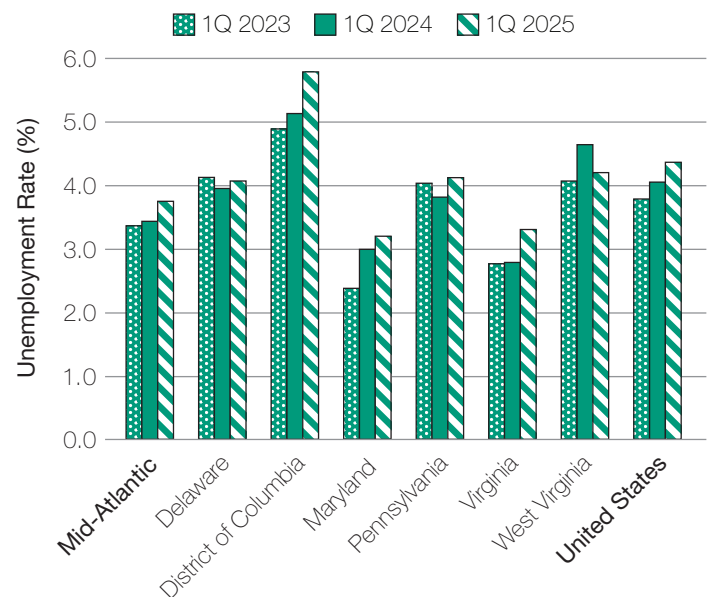
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As of the first quarter of 2025—

- Pennsylvania added the most jobs and had the highest rate of growth in the region, up by 74,100 jobs, or 1.2 percent, year over year to 6.14 million, accelerating from a gain of 59,200 jobs, or 1.0 percent, a year earlier. The education and health services sector led year-over-year job gains in the state, rising by 44,000, or 3.2 percent, and the other services sector had the fastest rate of growth, rising by 3.4 percent, or 8,600 jobs, from a year earlier.
- Job growth decelerated in Delaware, Maryland, and Virginia, with increases of 1.0, 0.3, and 1.2 percent representing job gains of 4,800, 8,400, and 48,500, respectively, from a year earlier. Job losses in the professional and business services sector contributed to decelerating growth in Delaware and Maryland, with declines of 200 and 9,400 jobs, or 0.4 and 2.0 percent, respectively, and the manufacturing sector declined by 2,100 jobs, or 0.9 percent, in Virginia.
- In West Virginia, the total number of nonfarm payrolls declined by 2,300, or 0.3 percent, from a year earlier. The leisure and hospitality and the government sectors led job losses in the state, decreasing by 3,200 and 2,000, or 4.6 and 1.3 percent, respectively, from a year earlier. However, a gain of 5,000 jobs, or 3.6 percent, in the education and health services sector partially offset statewide losses.
- In the District of Columbia, the number of jobs decreased by 1,800, or 0.2 percent, from a year earlier, because job losses in four of the nonfarm payroll sectors outpaced job gains in five sectors and jobs in two sectors were unchanged from a year ago. The professional and business services sector led job losses, declining by 2,300 jobs, or 1.3 percent, from a year earlier, whereas the leisure and hospitality sector added the most jobs, increasing by 1,400, or 1.8 percent, from the first quarter of 2024.

- The regional unemployment rate averaged 3.8 percent, up from 3.4 percent as of the first quarter of 2024. The largest increase regionwide was in the District of Columbia, where the unemployment rate rose from 5.1 percent in the first quarter of 2024 to 5.8 percent as of the first quarter of 2025. West Virginia was the only state where the average unemployment rate fell, declining year over year by nearly one-half of a percentage point to 4.2 percent currently.

As of the first quarter of 2025, the unemployment rate increased from a year ago in the District of Columbia and four of the five states in the region, although the regional average stayed below the national rate.



1Q = first quarter.

Source: U.S. Bureau of Labor Statistics

Population

Population growth in the Mid-Atlantic region accelerated from 2023 to 2024 compared with growth from 2022 to 2023, but the rate of growth was less than for the nation, partially because of the comparatively slower economic growth in the region. From 2023 to 2024, the regionwide population grew by approximately 213,600, or 0.7 percent, to nearly 31.68 million, whereas the population grew by nearly 131,400, or 0.4 percent, from 2022 to 2023 (U.S. Census Bureau population estimates as of July 1). By comparison, the population of the nation increased 1.0 percent from 2023 to 2024 and 0.8 percent from 2022 to 2023. The region accounted for approximately 9 percent of the total population in the nation in 2024, identical to the share in 2023. During the

most recent 12-month period, population growth occurred in every state in the Mid-Atlantic region except West Virginia, where the population was relatively unchanged from a year earlier. Regionwide, net in-migration of approximately 201,600 people accounted for 94 percent of the population growth, and net natural increase accounted for the remaining 6 percent. International net in-migration of nearly 214,000 people was partially offset by domestic net out-migration of 12,400 people.

During the 12 months ending July 2024—

- The fastest population growth rate in the nation was in the District of Columbia, where the population expanded by

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nearly 14,950, or 2.2 percent. The increase reflected net natural increase and net in-migration of approximately 2,750 and 12,200 people, respectively, with international net in-migration accounting for all of the net in-migration.

- Virginia had the largest numerical population gain in the region, increasing by 76,500, or 0.9 percent, with net in-migration accounting for approximately 80 percent of the population gain and net natural increase accounting for the remainder.
- Delaware had the third fastest growth rate in the nation, tied with North Carolina. The population of Delaware

increased by 15,500, or 1.5 percent, to approximately 1.05 million, similar to the growth from 2022 to 2023, when the population rose by 15,800, or 1.5 percent.

- The population in Pennsylvania increased by approximately 61,050, or 0.5 percent, to nearly 13.08 million, with net in-migration accounting for all of the population growth. In contrast, the population of West Virginia was relatively unchanged from a year earlier at 1.77 million, falling by approximately 500, because net natural decline totaling approximately 7,850 people outpaced net in-migration in the state.

The population in the Mid-Atlantic region increased from July 2023 to July 2024 from a year earlier, and West Virginia was the only state in the region where the population was virtually unchanged.

	Population Estimate (as of July 1)			Percentage Change	
	2022	2023	2024	2022 to 2023	2023 to 2024
United States	334,017,321	336,806,231	340,110,988	0.8	1.0
Mid-Atlantic Region	31,332,316	31,463,710	31,677,312	0.4	0.7
Delaware	1,020,625	1,036,423	1,051,917	1.5	1.5
District of Columbia	676,725	687,324	702,250	1.6	2.2
Maryland	6,192,440	6,217,062	6,263,220	0.4	0.7
Pennsylvania	12,984,990	13,017,721	13,078,751	0.3	0.5
Virginia	8,683,414	8,734,685	8,811,195	0.6	0.9
West Virginia	1,774,122	1,770,495	1,769,979	-0.2	0.0

Source: U.S. Census Bureau

Sales Market Conditions

As of the first quarter of 2025, home sales market conditions in the Mid-Atlantic region were mixed, ranging from balanced to slightly tight, similar to conditions as of the first quarter of 2024. The inventory of homes for sale in the region declined to 2.2 months of supply as of March 2025, down from 2.6 months in March 2024 (Redfin, a national real estate brokerage, with adjustments by the analyst). The supply of homes for sale in the region was lower than in the nation, which had a 3.1-month supply in March 2025, up from 2.6 months a year earlier. The inventories of homes for sale as of March 2025 were relatively low across all states in the region. Inventories fell in West Virginia, Pennsylvania, and Virginia to 2.6, 2.3, and 1.9 months, respectively, in March 2025. However, in the District of Columbia, Delaware, and Maryland, the supply increased to 5.2, 3.1, and 2.2 months, respectively, in March 2025, and the inventory in the District of Columbia was at the highest level since at least 2014.

Relatively low levels of for-sale inventory and elevated mortgage interest rates hindered home sales. The average interest rate for a 30-year, fixed-rate mortgage in the nation was 6.8 percent during the first quarter of 2025, up from 6.4 percent during

the first quarter of 2024 and much higher than the 2.9-percent average in the first quarter of 2021 (Freddie Mac). Sales of new and existing homes in the region fell 4 percent to 426,100 during the 12 months ending February 2025, following a 17-percent decrease a year earlier (Cotality, with adjustments by the analyst). Home sales declined in all five states in the region and the District of Columbia, ranging from a 6-percent decrease in West Virginia to 3-percent decreases in Maryland and Pennsylvania. In four of the five states in the region and the District of Columbia, the declines in home sales have slowed from a year earlier, when year-over-year decreases in home sales ranged from 3 to 21 percent. Home sales decreased in seven of the eight metropolitan areas cited in this report, with declines ranging from 2 to 7 percent during the 12 months ending February 2025 compared with declines ranging from 10 to 20 percent during the 12 months ending February 2024.

The average home price in the region was \$389,900 during the 12 months ending February 2025, up 7 percent from a year earlier, compared with a 2-percent increase during the previous 12 months. Average home prices rose in all states in the region

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Average home sales prices increased throughout the Mid-Atlantic region during the 12 months ending February 2025, whereas home sales declined, albeit at a slower rate than a year ago, in every highlighted metropolitan area in the region except Morgantown.

	12 Months Ending	Number of Homes Sold				Price		
		2024	2025	Percent Change	Average	2024 (\$)	2025 (\$)	Percent Change
Baltimore-Columbia-Towson, MD	February	42,950	41,150	-4	AVG	\$376,300	\$410,800	9
Dover, DE	February	3,225	3,000	-7	AVG	\$320,800	\$341,600	6
Morgantown, WV	February	1,850	1,850	0	AVG	\$260,000	\$278,700	7
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	February	79,250	77,850	-2	AVG	\$375,200	\$404,500	8
Pittsburgh, PA	February	32,800	31,550	-4	AVG	\$242,300	\$257,000	6
Richmond, VA	February	21,150	20,200	-4	AVG	\$390,000	\$423,200	9
Virginia Beach-Chesapeake-Norfolk, VA-NC	February	30,150	28,850	-4	AVG	\$376,800	\$397,600	6
Washington-Arlington-Alexandria, DC-VA-MD-WV	February	77,200	74,950	-3	AVG	\$634,200	\$666,400	5

AVG = average.

Notes: All figures are rounded. Data include new and existing single-family homes, townhomes, and condominiums.

Source: Cotality, with adjustments by the analyst

and the District of Columbia. Increases ranged from 3 percent in the District of Columbia to 10 percent in West Virginia, where prices averaged \$809,600 and \$200,700, respectively. The average home prices in Pennsylvania and Virginia increased 7 percent each to \$303,900 and \$467,500, respectively, accelerating from price increases of 3 and 4 percent a year earlier. In Maryland and Delaware, the average home prices rose 8 and 9 percent to \$456,800 and \$436,700, respectively, accelerating from 1- and 5-percent increases during the 12 months ending February 2024. Average home prices rose in all metropolitan areas cited in this report, ranging from 5 percent in the Washington-Arlington-Alexandria, DC-VA-MD-WV (hereafter, Washington) metropolitan area to 9 percent each in the Baltimore-Columbia-Towson, MD (hereafter, Baltimore) and Richmond, VA metropolitan areas.

The share of seriously delinquent mortgages and real estate owned properties in the region was 1.2 percent in February 2025, up slightly from 1.1 percent in February 2024 but below the 1.6-percent prepandemic rate in February 2020 (Cotality). The rates ranged from 0.8 percent in Virginia to 1.4 percent each in Maryland and the District of Columbia, and both Pennsylvania and West Virginia had rates of 1.3 percent in February 2025.

As of the first quarter of 2025, homebuilding activity in the region, as measured by the number of single-family homes permitted, declined from the first quarter of 2024 at a rate similar to the decrease in new and existing home sales.

As of the first quarter of 2025 (preliminary data)—

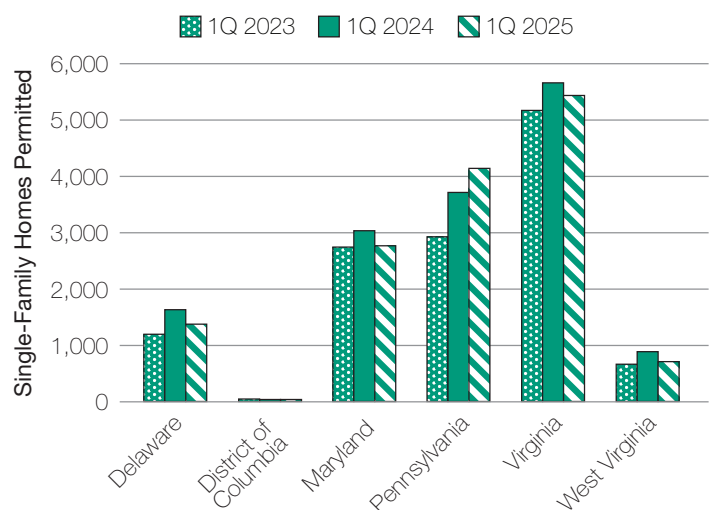
- Single-family permitting in the region decreased to approximately 14,500 homes, down by 500 homes, or

3 percent, from the number of homes permitted during the first quarter of 2024 (preliminary data).

- Homebuilding activity fell the most in Maryland, declining by 270 homes, or 9 percent, from a year ago, when single-family homebuilding activity increased 11 percent from the first quarter of 2023. A portion of the statewide decrease was due to an 18-percent decline in homebuilding activity in the Baltimore metropolitan area from a year ago.

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Single-family home permitting decreased in the Mid-Atlantic region as of the first quarter of 2025 compared with a year ago, with declines in the District of Columbia and every state except Pennsylvania.



1Q = first quarter.

Note: Based on preliminary data.

Source: U.S. Census Bureau, Building Permits Survey

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- Homebuilding activity in Delaware, Virginia, and West Virginia fell by 250, 230, and 170 homes, or 15, 4, and 20 percent, respectively, from a year ago, when single-family home permitting increased 36, 9, and 33 percent, respectively. Single-family permitting in the District of Columbia fell by fewer than 10 homes, or 15 percent, from a year ago, when homebuilding activity fell 6 percent from the first quarter of 2023.
- Offsetting some of the declines in the region, single-family home permitting in Pennsylvania increased to 4,150 homes, up 12 percent from a year ago, when single-family homebuilding increased 27 percent from the first quarter of 2023. A decrease in homebuilding activity in the Pittsburgh metropolitan area of 2 percent from the first quarter of 2024 to 890 homes permitted contributed to the slower increase in single-family home permitting statewide.

Apartment Market Conditions

Conditions in apartment markets in the Mid-Atlantic region were mixed as of the first quarter of 2025, ranging from soft to slightly tight. Apartment vacancy rates decreased in three of the eight metropolitan areas highlighted in this report during the past year. Average apartment rents increased in all eight markets, with rent growth ranging from 2 to 3 percent, and the rents increased at a faster pace than a year ago in five markets (CoStar Group).

As of the first quarter of 2025, conditions were soft or slightly soft in four of the eight metropolitan areas cited in this report, with conditions in each market unchanged from a year ago. Conditions were soft in the Richmond metropolitan area, with a vacancy rate of 9.2 percent, up from 8.9 percent as of the first quarter of 2024, and the average rent rose 2 percent to \$1,565. The vacancy rate rose because the completion of 4,000 units outpaced the absorption of 3,325 units. Slightly soft conditions persisted in the Baltimore metropolitan area, where the vacancy rate was unchanged at 7.2 percent, but the average rent increased 3 percent to \$1,723, and the absorption of units increased. Conditions in the Philadelphia-Camden-Wilmington (hereafter, Philadelphia) and the Washington metropolitan areas were also slightly soft as of the first quarter

of 2025. The vacancy rate in the Philadelphia metropolitan area fell 0.1 percentage point from a year ago to 7.5 percent as of the first quarter of 2025, partly because the number of units absorbed exceeded completions by approximately 540 units. The average rent in the Philadelphia metropolitan area was \$1,809, up 2 percent from the first quarter of 2024. In contrast, the vacancy rate in the Washington metropolitan area increased to 7.5 percent as of the first quarter of 2025 from 7.1 percent a year ago, partly because 2,625 units were completed, outpacing a slight increase in absorption. The average rent in the Washington metropolitan area increased 3 percent year over year as of the first quarter of 2025 to \$2,272, the highest rent among areas cited in this report.

Conditions were balanced in the Pittsburgh and the Virginia Beach-Chesapeake-Norfolk (hereafter, Virginia Beach) metropolitan areas, with vacancy rates of 6.1 and 6.4 percent, respectively. The vacancy rate in the Pittsburgh metropolitan area declined from 6.6 percent a year ago, and the average rent rose 3 percent to \$1,376. The vacancy rate in the Virginia Beach metropolitan area increased from 6.2 percent a year ago, and the pace of rent growth was unchanged from the first quarter of 2024 at 3 percent, with rents rising to an average of \$1,545.

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As of the first quarter of 2025, average rents increased from a year ago throughout the major metropolitan areas in the Mid-Atlantic region.

	Market Condition	Vacancy Rate			Average Monthly Rent		
		1Q 2024 (%)	1Q 2025 (%)	Percentage Point Change	1Q 2024 (\$)	1Q 2025 (\$)	Percent Change
Baltimore-Columbia-Towson, MD	Slightly Soft	7.2	7.2	0	1,675	1,723	3
Dover, DE	Slightly Tight	3.2	3.7	0.5	1,545	1,584	3
Morgantown, WV	Slightly Tight	5.3	3.5	-1.8	1,031	1,067	3
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	Slightly Soft	7.6	7.5	-0.1	1,773	1,809	2
Pittsburgh, PA	Balanced	6.6	6.1	-0.5	1,336	1,376	3
Richmond, VA	Soft	8.9	9.2	0.3	1,527	1,565	2
Virginia Beach-Chesapeake-Norfolk, VA-NC	Balanced	6.2	6.4	0.2	1,501	1,545	3
Washington-Arlington-Alexandria, DC-VA-MD-WV	Slightly Soft	7.1	7.5	0.4	2,208	2,272	3

1Q = first quarter.

Sources: Market condition—Economic and Market Analysis Division; vacancy rate and average monthly rent—CoStar Group



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Apartment market conditions in the Morgantown metropolitan area tightened from balanced conditions a year ago, when the vacancy rate was 5.3 percent, and the market was slightly tight as of the first quarter of 2025, with a vacancy rate of 3.5 percent. The average rent was \$1,067, up 3 percent year over year, accelerating from a 1-percent increase a year earlier. Slightly tight conditions continued from a year ago in the Dover metropolitan area, where the vacancy rate was 3.7 percent, up from 3.2 percent a year ago. The increase occurred because the number of apartment completions was 16 percent greater than the number of units absorbed in the past year.

Multifamily building activity in the Mid-Atlantic region, as measured by the number of units permitted, increased as of the first quarter of 2025 from the same period a year earlier, with declines in Delaware and Maryland offset by increases in the other three states in the region and the District of Columbia.

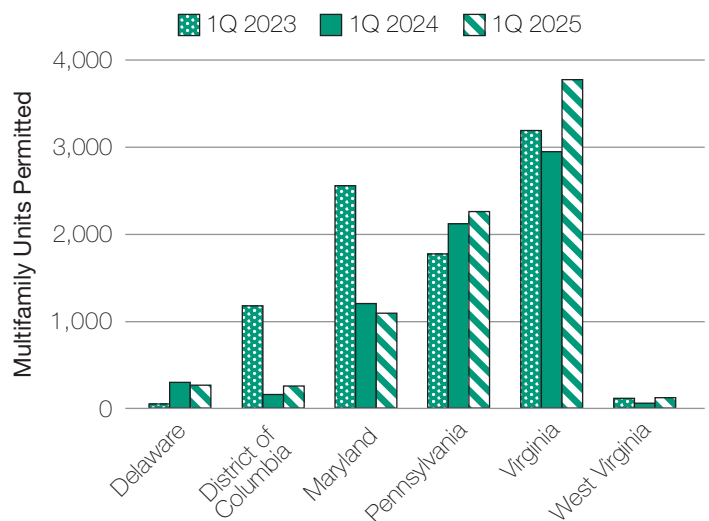
As of the first quarter of 2025 (preliminary data)—

- Approximately 7,775 multifamily units were permitted in the region, reflecting a 15-percent increase from the first quarter of 2024, when multifamily permitting decreased 23 percent from a year earlier (preliminary data). The rise in multifamily permitting activity in the region was due to increases in the District of Columbia, Pennsylvania, Virginia, and West Virginia.
- The largest rise in multifamily units permitted was in Virginia, which increased by approximately 820 units, or 28 percent, from a year ago to 3,775 units, accounting for approximately 84 percent of the net increase in multifamily permitting in the region. Much of the rise occurred in the Richmond metropolitan area, where 1,325 units were permitted, more than doubling from the first quarter of 2023.
- In the District of Columbia, Pennsylvania, and West Virginia, the number of multifamily units permitted rose by 90, 140, and 60 from the first quarter of 2024 to 260, 2,250, and

130 units, respectively. By comparison, multifamily permitting a year earlier in the District of Columbia and West Virginia declined 86 and 45 percent, to 165 and 65 units, respectively, and multifamily permitting in Pennsylvania increased 20 percent from the first quarter of 2023 to 2,125 units.

- The number of multifamily units permitted in Delaware and Maryland declined 9 percent each, or by 110 and 30 units, from the first quarter of 2024 to 1,100 and 270 units, respectively. Partly offsetting the statewide decreases, permitting in the Baltimore metropolitan area approximately doubled from the first quarter of 2024 to 1,025 units, and multifamily permitting activity in the Dover metropolitan area rose from 10 units as of the first quarter of 2024 to 50 units as of the first quarter of 2025.

Multifamily permitted increased in four of the six areas in the Mid-Atlantic region as of the first quarter of 2025.



1Q = first quarter.

Note: Based on preliminary data.

Source: U.S. Census Bureau, Building Permits Survey

Terminology Definitions and Notes

A. Definitions

Absorption	The net change, positive or negative, in the number of occupied units in a given geographic range.
Apartment Vacancy Rate/Average Monthly Rent	Data are for market-rate and mixed market-rate and affordable general occupancy apartment properties with five or more units, including those that are stabilized and in lease up.
Building Permits	Building permits do not necessarily reflect all residential building activity. Some units are constructed or created without a building permit or are issued a different type of building permit. For example, some units classified as commercial structures are not reflected in the residential building permits. As a result, the analyst, through diligent fieldwork, makes an estimate of this additional construction activity. Some of these estimates are included in the discussions of single-family and multifamily building permits.
Home Sales/Home Sales Prices	Includes single-family home, townhome, and condominium sales.
Net Natural Decline	Resident deaths are greater than resident births.
Net Natural Increase	Resident births are greater than resident deaths.
Seriously Delinquent Mortgages	Mortgages 90 or more days delinquent or in foreclosure.

B. Notes on Geography

1.	The metropolitan statistical area definitions noted in this report are based on the delineations established by the Office of Management and Budget (OMB) in the OMB Bulletin dated July 21, 2023.
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