

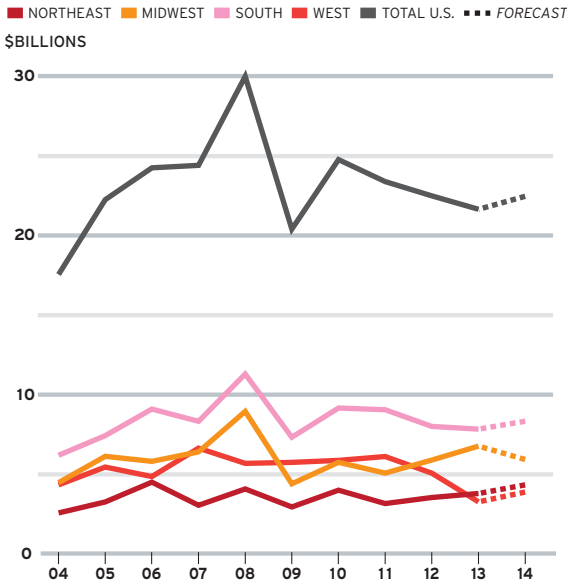
MARKET FOCUS

HEALTH CARE

Health-care construction starts have been hampered by questions concerning the ramifications of the Affordable Care Act. But the market should soon pick up to meet the growing demands of an aging population.

Health-Care Starts by Region

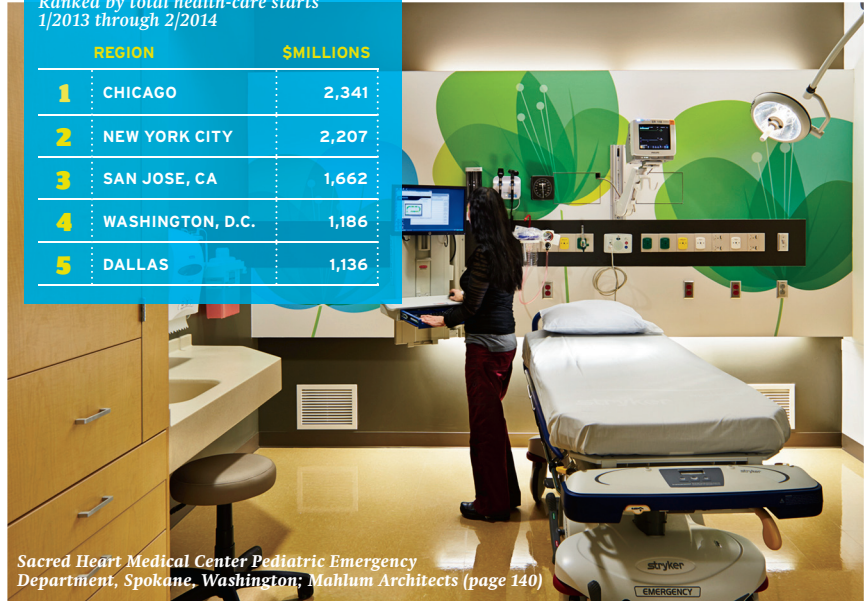
In addition to U.S. total and 2014 forecast figures



Top Metro-Area Markets

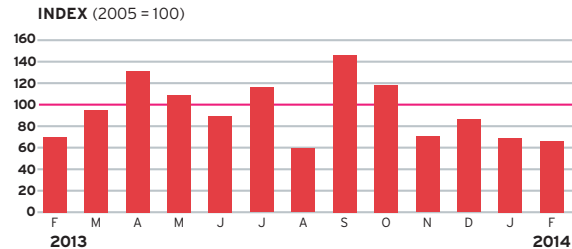
Ranked by total health-care starts 1/2013 through 2/2014

Rank	Region	\$Millions
1	CHICAGO	2,341
2	NEW YORK CITY	2,207
3	SAN JOSE, CA	1,662
4	WASHINGTON, D.C.	1,186
5	DALLAS	1,136



Sacred Heart Medical Center Pediatric Emergency Department, Spokane, Washington; Mahlum Architects (page 140)

The Dodge Index for Health-care Construction 2/2013-2/2014



The index is based on seasonally adjusted data for U.S. health-care construction starts. The average dollar value of projects in 2005 serves as the index baseline.

Top 5 Design Firms

Ranked by health-care construction starts 1/2011 through 2/2014

- 1 **NBBJ**
- 2 **Rafael Viñoly Architects**
- 3 **Earl Swenson Associates**
- 4 **H+L Architecture**
- 5 **ZGF Architects**

Top 5 Projects

Ranked by health-care construction starts 1/2013 through 2/2014

- \$830 MILLION**
PROJECT: New Stanford Hospital
ARCHITECT: Rafael Viñoly Architects
LOCATION: Palo Alto, CA
- \$550 MILLION**
PROJECT: The Ability Institute of RIC
ARCHITECTS: HDR, Gensler
LOCATION: Chicago
- \$537 MILLION**
PROJECT: Fort Bliss Replacement Hospital
ARCHITECT: HDR
LOCATION: El Paso, TX
- \$450 MILLION**
PROJECT: Stamford Hospital
ARCHITECT: WHR Architects
LOCATION: Stamford, CT
- \$340 MILLION**
PROJECT: Sanford Medical Center
ARCHITECT: HKS Architects
LOCATION: Fargo, ND

MOMENTUM INDEX SLIPS AGAIN

In March, the Momentum Index retreated for a second month in a row, falling 0.8% to 113.8. Despite the drop, the long-term outlook for construction is still a positive one.

The Dodge Momentum Index is a leading indicator of construction spending. The information is derived from first-issued planning reports in McGraw Hill Construction's Dodge Reports database. The data lead the U.S. Commerce Department's nonresidential spending by a full year. In the graph to the right, the index has been shifted forward 12 months to reflect its relationship with the Commerce data.

