

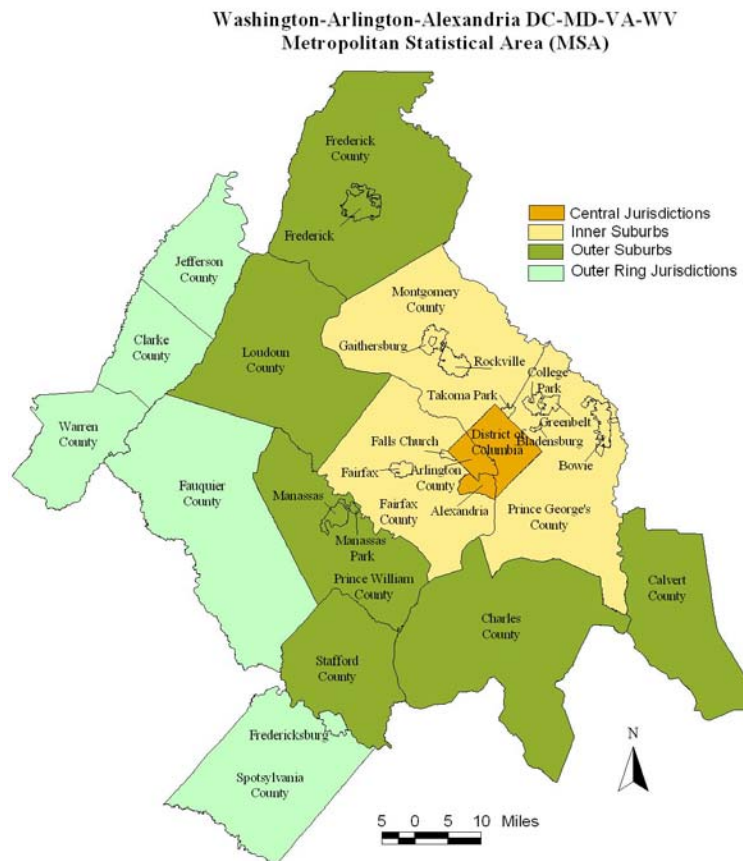
in Metropolitan Washington: 2005-2009

Economic Trends in Metropolitan Washington

This is an annual publication of the Metropolitan Washington Council of Governments. This year's report focuses on economic trends between 2005 and 2009, and is divided into sections covering population, employment, federal expenditures and obligations, labor force, construction, retail sales, mortgage rates and new home sales, personal income, inflation, and transportation.

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Throughout the report, information is presented at different levels of geographic specificity. These levels and their components are outlined below:

The Metropolitan Washington Council of Governments (COG) Region:

The 21 members of COG include the District of Columbia, Frederick County, Montgomery County, Prince George's County, and the Cities of Bowie, College Park, Frederick, Gaithersburg, Greenbelt, Rockville, and Takoma Park and the Town of Bladensburg in Maryland; and Arlington County, Fairfax County, Loudoun County, Prince William County, and the Cities of Alexandria, Fairfax, Falls Church, Manassas, and Manassas Park in Virginia.

The Washington-Arlington-Alexandria DC-MD-VA-WV Metropolitan Statistical Area (MSA)

(see map): As defined by the Office of Management and Budget (OMB) in 2003, extends beyond the membership of COG to include Calvert and Charles counties in Maryland; Clarke, Warren, Fauquier, Stafford, and Spotsylvania Counties and the City of Fredericksburg in Virginia; and Jefferson County in West Virginia.

(see back page for additional geographic definitions)

Executive Summary

ECONOMIC TRENDS *AT A GLANCE*

■ POPULATION

The population of the Washington region (2003 MSA) in 2009 was approximately 5.4 million people. The region grew by more than 218,200 people between 2005 and 2009. The majority of this growth occurred in the region's outer suburbs, which increased by 8.7 percent or 98,100 people. The outer ring jurisdictions added 18,300 people or 6.1 percent. The inner suburbs, with the addition of 61,200 people, grew by 2.2 percent. The region's central jurisdictions gained 40,600 people, or 4.4 percent.

■ EMPLOYMENT

Between 2005 and 2009, the region added 17,880 jobs. As a result, the total number of jobs rose to 2.86 million in 2009. During the same time period, the region's top job growth occurred in three jurisdictions: the District of Columbia (20,900 jobs), Loudoun County (9,207 jobs), and Fairfax County (5,753 jobs). The following jurisdictions lost jobs: Montgomery County (-15,363 jobs), Prince George's County (-8,673 jobs), and the city of Fairfax (-3,622 jobs).

■ FEDERAL SPENDING*

Federal spending in the Washington region increased to \$136.1 billion in FY 2008, up from \$125.5 billion in FY 2007. More than 50.9 percent, or \$69.3 billion, came in procurement contract awards which, for the ninth time, exceeded expenditures in the region for salaries and wages.

■ LABOR FORCE

Between 2005 and 2009, the civilian labor force in the Washington region increased by 151,900 people, to a total of 3.05 million. Of that number, 2.87 million were employed and 182,900 were unemployed, putting the unemployment rate for the civilian labor force in the Washington region at 6.0 percent in 2009.

■ CONSTRUCTION

Commercial construction in the metropolitan Washington region decreased significantly during 2009 with developers breaking ground on more than 15.5 million square feet of space. In 2009, commercial construction in the region increased from the 2008 total of 37.3 million square feet, and was far below the 2000 peak of 48.6 million. The number of new, privately owned housing units authorized in the region decreased from 13,732 in 2008 to 12,329 in 2009.

■ MORTGAGE RATES, HOME SALES, AND HOUSING-RELATED INFLATION

Mortgage rates continued to edge down between 2005 and 2009 to a low of 5.0 percent in 2009 (first and second quarters). Average rates dropped from 6.1 percent in 2005 to 5.1 percent in 2009. The number of homes sold in the region dropped dramatically between 2005 and 2009, from 113,544 units in 2005 to 70,355 units in 2009. The rate of change in the Consumer Price Index for housing in the Washington-Baltimore DC-MD-VA-WV CMSA decreased from 4.7 percent between 2007 and 2008 to 1.7 percent between 2008 and 2009.

■ INFLATION

The rate of change in the Consumer Price Index for All Urban Consumers (CPI-U) for the Washington-Baltimore DC-MD-VA-WV CMSA increased from 4.5 percent between 2007 and 2008 to 0.2 percent between 2008 and 2009.

■ INCOME*

Total personal income in the Washington region grew by an average annual rate of 6.3 percent between 2004 and 2008, leading to a 2008 total of \$305.6 billion. On a per capita basis, income varied greatly by jurisdiction, with a regional average of \$56,824.

■ RETAIL SALES*

Retail sales in the region increased in current terms between 2004 and 2008. The region's 2008 total of \$76.4 billion, when adjusted for inflation, was less than the total annual retail sales in 2007, \$76.6 billion, and more than the 2006 total of \$75.7 billion.

■ AIRLINE PASSENGERS

More than 61 million passengers flew into or out of the Washington region's three major airports in 2009, a 4.4 percent decrease from 2005.

***Please Note: 2008 is the latest release year for federal spending, income, and retail sales related data for the report.**

Population

Population of the Washington-Arlington-Alexandria DC-MD-VA MSA, by Jurisdiction, 2005–2009

(Thousands of People)

The region grew by more than 218,200 people between 2005 and 2009. The majority of this growth occurred in the region's outer suburbs, which increased by 8.7 percent or 98,100 people. The outer ring jurisdictions added 18,300 people, or 6.1 percent. The inner suburbs, with the addition of 61,200 people, grew by 2.2 percent. The region's central jurisdictions gained 40,600 people, or 4.4 percent.

Despite the dramatic growth rate in the outer suburbs, the population remains anchored in the inner suburbs, where 53.6 percent of the region's population lives.

According to COG's Draft Round 8.0 Cooperative Forecasts, the inner suburbs will remain the most populous "ring" of the region. COG forecasts that in the year 2040, the region (MSA 2003) will hold more than 7.3 million people (40.5 percent more than the 2005 population). About 47 percent of the 2040 population is expected to live in the inner suburbs.

JURISDICTIONS	Year					Change 2005 - 2009	
	2005	2006	2007	2008	2009	Number	Percentage
District of Columbia	582.0	585.4	587.9	591.8	599.7	17.6	3.0%
Arlington County	199.3	201.0	202.8	206.7	209.3	10.0	5.0%
City of Alexandria	137.1	138.2	140.2	144.6	150.0	12.9	9.4%
Central Jurisdictions	918.4	924.7	930.9	943.1	959.0	40.6	4.4%
Montgomery County	928.9	935.2	941.5	953.7	971.6	42.7	4.6%
City of Gaithersburg*	58.0	57.8	58.8	57.4	57.8	-0.1	-0.2%
City of Rockville*	59.6	60.1	61.2	61.9	62.3	2.7	4.6%
City of Takoma Park*	17.3	17.3	17.3	17.3	17.3	0.0	0.0%
Prince George's County	838.2	834.7	828.8	830.5	834.6	-3.6	-0.4%
City of Bowie*	54.6	55.5	55.6	55.7	55.8	1.2	2.3%
City of College Park*	27.2	28.3	28.3	28.3	29.0	1.8	6.6%
City of Greenbelt*	20.9	20.9	20.9	20.9	20.9	0.0	0.0%
Town of Bladensburg*	7.7	7.7	7.7	7.7	7.7	0.0	0.0%
Fairfax County	1,033.6	1,037.3	1,041.5	1,045.3	1,052.0	18.4	1.8%
City of Fairfax	21.9	22.8	23.3	23.9	24.7	2.7	12.5%
City of Falls Church	10.9	10.9	11.0	11.4	11.9	1.0	9.3%
Inner Suburbs	2,833.5	2,840.8	2,846.1	2,864.8	2,894.7	61.2	2.2%
Loudoun County	247.3	262.6	271.2	278.6	283.3	36.0	14.6%
Prince William County	354.4	371.2	381.2	388.3	392.9	38.5	10.9%
City of Manassas	37.0	38.1	37.6	36.7	35.9	-1.1	-3.0%
City of Manassas Park	13.3	13.9	14.0	14.1	14.0	0.7	5.5%
Stafford County	116.7	118.5	120.8	122.1	124.2	7.5	6.4%
Frederick County	223.0	228.3	231.5	232.7	234.4	11.4	5.1%
City of Frederick*	59.1	60.7	61.5	61.8	62.2	3.1	5.3%
Charles County	137.1	139.2	140.2	140.8	142.2	5.1	3.7%
Calvert County	86.8	88.0	89.5	90.0	90.7	3.9	4.5%
Outer Suburbs	1,128.8	1,171.7	1,196.4	1,213.1	1,227.0	98.1	8.7%
MSA (1983) Total	4,880.7	4,937.2	4,973.4	5,021.0	5,080.6	199.9	4.1%
City of Fredericksburg	21.3	22.0	22.4	22.7	23.2	1.9	9.0%
Spotsylvania County	114.9	117.7	118.8	120.0	121.0	6.1	5.3%
Fauquier County	64.3	65.7	66.4	67.2	68.0	3.7	5.8%
Warren County	35.0	35.8	36.3	36.7	36.7	1.7	5.0%
Clarke County	14.0	14.3	14.5	14.6	14.6	0.6	4.1%
Jefferson County	48.5	49.7	51.0	51.9	52.8	4.3	8.8%
Outer Ring Jurisdictions	298.0	305.2	309.5	313.2	316.2	18.3	6.1%
MSA (2003) Total	5,178.7	5,242.4	5,282.8	5,334.2	5,396.9	218.2	4.2%

Sources: Census Bureau annual population estimates for the District of Columbia, Charles County, the City of Alexandria, Stafford County, Prince George's County, the City of Fairfax, and the Outer Ring Jurisdictions; Census 2000 population count for Takoma Park and Bladensburg; local government estimates for all other jurisdictions.

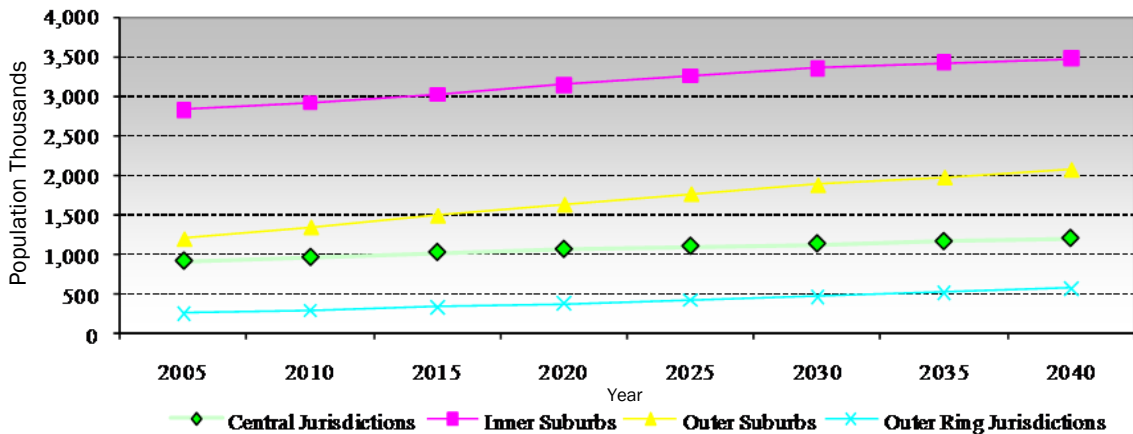
* Persons in Maryland cities are included in appropriate county totals.

Population

Summary of Forecast of Population, by Jurisdiction,
Draft Round 8.0 Cooperative Forecasts for the Washington-Arlington-Alexandria DC-MD-VA-WV MSA
(Thousands of People)

JURISDICTIONS	Year								Change 2005 - 2040	
	2005	2010	2015	2020	2025	2030	2035	2040	Number	Percentage
District of Columbia	582.0	605.5	651.5	669.8	693.8	711.9	730.4	760.5	178.5	30.7%
Arlington County	199.2	212.3	224.8	235.5	241.4	247.3	249.6	252.0	52.8	26.5%
City of Alexandria	135.9	145.0	149.1	158.5	166.9	173.3	180.9	188.3	52.4	38.6%
Central Jurisdictions	917.1	962.8	1,025.4	1,063.8	1,102.1	1,132.5	1,160.8	1,200.8	283.7	30.9%
Montgomery County	929.1	980.0	1,017.0	1,065.0	1,109.0	1,152.0	1,182.0	1,199.0	269.9	29.0%
City of Rockville a/	59.6	62.5	67.3	71.8	74.5	77.6	80.8	83.9	24.3	40.8%
City of Gaithersburg a/	57.2	58.3	62.0	67.2	72.1	76.7	81.0	84.6	27.5	48.0%
Prince George's County	835.7	846.2	873.1	895.7	913.4	928.3	939.9	950.1	114.4	13.7%
Fairfax County b/	1,033.6	1,056.4	1,094.1	1,147.2	1,195.1	1,232.2	1,263.4	1,281.3	247.6	24.0%
City of Fairfax	22.4	23.9	25.6	26.9	27.2	25.7	28.3	29.2	6.7	30.0%
City of Falls Church	10.6	11.3	12.9	13.9	14.7	15.1	15.5	15.7	5.1	48.1%
Inner Suburbs	2,831.5	2,917.7	3,022.7	3,148.7	3,255.1	3,429.2	3,427.3	3,475.2	643.8	22.7%
Loudoun County	247.3	290.0	318.7	357.7	397.1	419.0	431.2	439.7	192.4	77.8%
Prince William County	354.8	396.5	443.6	479.4	510.2	535.6	556.2	572.5	217.7	61.3%
City of Manassas	37.6	40.4	41.8	43.3	44.9	46.5	48.1	49.7	12.1	32.1%
City of Manassas Park	12.9	15.0	15.8	16.5	16.7	16.8	16.9	17.0	4.2	32.3%
Stafford County c/	108.1	132.2	156.2	177.0	197.7	218.0	238.2	258.5	150.4	139.2%
Frederick County	220.9	243.2	265.6	287.9	311.1	340.0	371.7	406.4	185.5	84.0%
Charles County	136.4	144.6	160.1	176.0	191.5	202.6	213.7	224.9	88.5	64.9%
Calvert County	86.5	91.7	96.5	100.5	103.3	105.1	107.0	108.9	22.4	25.9%
Outer Suburbs	1,204.4	1,353.6	1,498.1	1,639.3	1,772.4	1,883.6	1,982.9	2,077.6	873.2	72.5%
MSA (1983) Total	4,953.0	5,234.2	5,546.2	5,850.8	6,134.0	6,371.2	6,572.9	6,753.6	1,800.6	36.4%
City of Fredericksburg c/	22.6	23.2	23.7	25.3	26.8	28.3	29.9	31.4	8.8	39.1%
Spotsylvania County c/	113.8	134.3	154.8	175.8	196.6	216.8	236.9	257.1	143.4	126.0%
Fauquier County	64.9	74.8	86.2	99.4	114.7	132.3	152.6	175.9	111.0	170.9%
Warren County d/	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Clarke County	14.1	15.4	16.2	16.9	17.9	18.8	19.8	20.8	6.8	48.2%
Jefferson County	46.7	51.2	56.7	62.1	68.9	75.6	83.1	91.4	44.7	95.7%
Outer Ring Jurisdictions	262.1	298.8	337.5	379.6	424.8	471.8	522.2	576.6	314.6	120.0%
MSA (2003) Total	5,215.1	5,533.0	5,883.8	6,230.4	6,558.8	6,843.0	7,095.1	7,330.2	2,115.1	40.6%

Draft 8.0 Cooperative Population Forecast, 2005-2040



a/ Included in Montgomery County total.

b/ Includes Fairfax County group quarters population at the Fairfax County Public Safety Center.

c/ Source: GWRC/FAMPO Regional Demographic Control Forecasts for 2035 CLRP Socioeconomic Data, June 2008.

d/ Warren County does not participate in COG's Cooperative Forecasting Program.

Employment

At-Place Employment in the Washington-Arlington-Alexandria DC-MD-VA-WV MSA, by Jurisdiction, 2005–2009

JURISDICTIONS	Year					Change 2005 - 2009
	2005	2006	2007	2008	2009	
District of Columbia	682,300	687,700	693,800	703,900	703,200	20,900
Arlington County	154,077	158,232	153,373	156,288	158,684	4,607
City of Alexandria	93,538	94,128	100,079	100,555	98,182	4,644
Central Jurisdictions	929,915	940,060	947,252	960,743	960,066	30,151
Montgomery County	458,639	464,833	459,346	457,518	443,305	-15,363
Prince George's County	312,668	312,943	315,696	313,396	303,966	-8,673
Fairfax County	565,179	574,640	584,922	587,820	570,932	5,753
City of Fairfax	23,692	23,118	21,779	20,533	20,070	-3,622
City of Falls Church	14,609	14,666	12,574	12,638	12,546	-2,063
Inner Suburbs	1,374,787	1,390,200	1,394,317	1,391,905	1,350,819	-23,968
Loudoun County	120,420	125,599	129,090	132,769	129,627	9,207
Prince William County	100,751	104,037	103,624	103,715	102,008	1,257
City of Manassas	24,399	24,762	24,772	24,151	23,060	-1,339
City of Manassas Park	3,832	3,936	3,715	3,300	3,001	-831
Stafford County	30,003	31,824	34,113	35,037	34,858	4,855
Frederick County	91,079	92,024	94,913	93,971	91,570	491
Charles County	40,769	41,970	42,248	42,113	40,484	-285
Calvert County	20,810	21,434	21,838	21,855	21,168	358
Outer Suburbs	432,063	445,586	454,313	456,911	445,776	13,713
MSA (1983) Total	2,736,765	2,775,846	2,795,882	2,809,599	2,756,661	19,896
City of Fredericksburg	26,453	26,909	26,689	25,419	25,688	-765
Spotsylvania County	28,506	29,768	29,816	29,885	28,741	235
Fauquier County	21,579	22,023	21,710	21,419	20,271	-1,308
Warren County	11,006	11,507	11,668	12,132	11,729	723
Clarke County	4,407	4,364	4,374	4,303	4,017	-390
Jefferson County	14,354	14,541	14,807	14,292	13,843	-511
Outer Ring Jurisdictions	106,305	109,112	109,064	107,450	104,289	-2,016
MSA (2003) Total	2,843,070	2,884,958	2,904,946	2,917,009	2,860,950	17,880

Source: Compiled by COG from the District of Columbia Department of Employment Services, Labor Market Information Staff; Maryland Department of Labor, Licensing and Regulation, Employment and Payrolls Reports; Virginia Employment Commission, Economic Information Services Division; and WORKFORCE West Virginia, Research, Information, and Analysis.

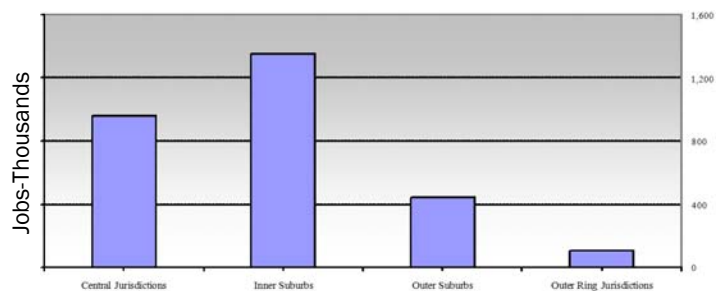
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Persons in Maryland cities are included in appropriate county totals.

Between 2005 and 2009, the region added 17,880 jobs. As a result, the total number of jobs rose to 2.86 million in 2009.

In 2009, more than 47 percent of the total jobs were within the inner suburbs, 34 percent within the central jurisdictions, the outer suburbs with 16 percent, and the outer ring jurisdictions with four percent. During the same time period, the region's top job growth occurred in three jurisdictions: the District of Columbia (20,900 jobs), Loudoun County (9,207 jobs), and Fairfax County (5,753 jobs). The following jurisdictions lost jobs: Montgomery County (-15,363 jobs), Prince George's County (-8,673 jobs), and the city of Fairfax (-3,622 jobs).

Total Number of Jobs in 2009

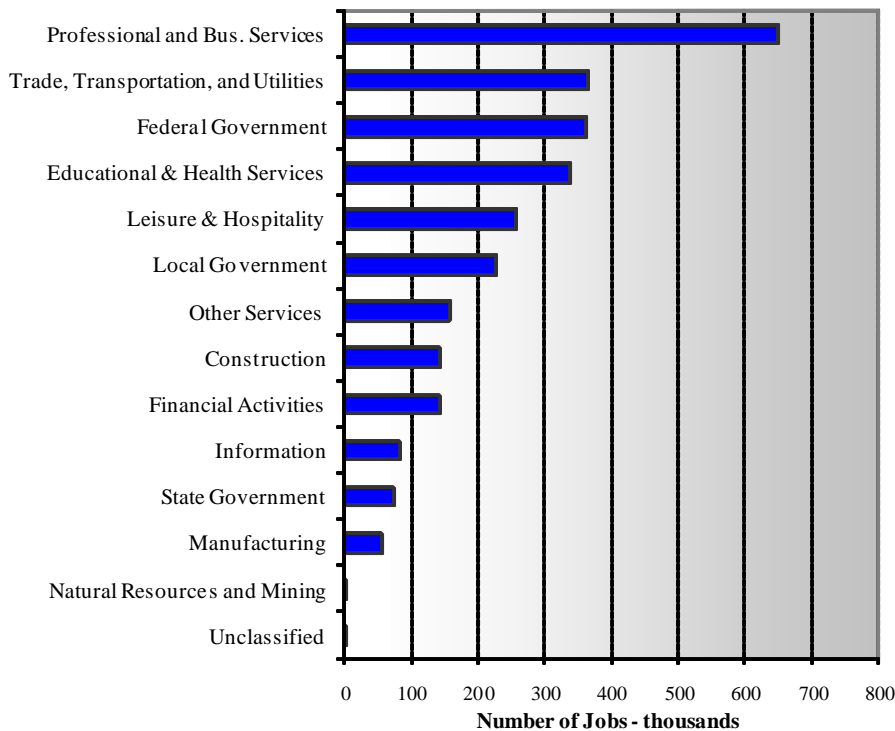


Employment

At-Place Employment in the Washington-Arlington-Alexandria DC-MD-VA-WV MSA, by Industrial Group, 2005 - 2009

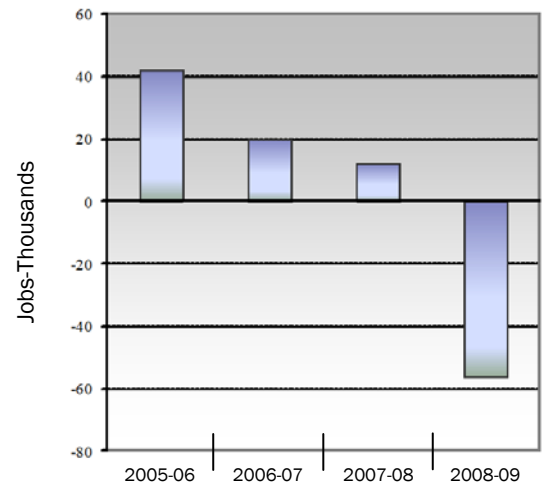
NAICS - INDUSTRIAL GROUP	Year					Change 2005 - 2009	
	2005	2006	2007	2008	2009	Number	Percentage
Natural Resources & Mining	3,706	3,805	3,831	3,869	3,418	-288	-7.8%
Manufacturing	66,120	64,745	63,625	62,079	57,719	-8,401	-12.7%
Construction	181,142	185,938	178,904	166,975	143,743	-37,399	-20.6%
Trade, Transportation & Utilities	394,892	392,332	392,044	385,712	365,028	-29,864	-7.6%
Information	98,019	95,822	91,968	89,894	82,022	-15,997	-16.3%
Financial Activities	157,838	157,054	154,502	149,268	142,857	-14,981	-9.5%
Professional and Business Services	623,029	646,738	655,962	659,865	650,560	27,531	4.4%
Educational & Health Services	298,077	306,193	317,783	327,398	338,664	40,587	13.6%
Leisure & Hospitality	248,295	248,586	253,516	261,139	257,102	8,807	3.5%
Other Services	150,232	152,484	156,043	160,818	156,675	6,443	4.3%
Federal Government	339,445	341,459	341,777	348,485	361,049	21,604	6.4%
State Government	71,295	72,994	74,295	74,826	75,440	4,145	5.8%
Local Government	210,163	216,197	220,006	226,084	226,493	16,330	7.8%
Unclassified	817	611	690	597	180	-637	-78.0%
Total	2,843,070	2,884,958	2,904,946	2,913,952	2,860,950	17,880	0.6%

Number of Jobs by Industrial Group, 2009



Annual Change in Number of Jobs

2005-2009



Source: Compiled by COG from the District of Columbia Department of Employment Services, Labor Market Information Staff; Maryland Department of Labor, Licensing and Regulation, Employment and Payrolls Reports; Virginia Employment Commission, Economic Information Services Division; and WORKFORCE West Virginia, Research, Information, and Analysis.

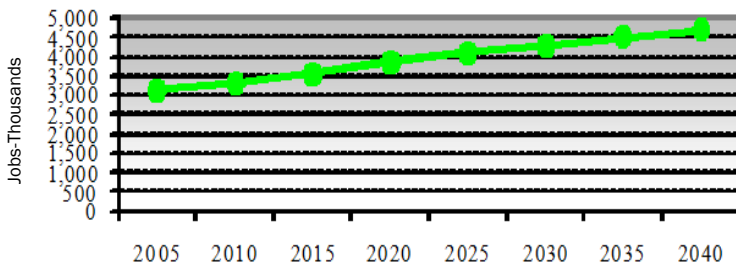
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Employment

Summary of Forecast of Employment, by Jurisdiction Draft Round 8.0 Cooperative Forecast for the Washington-Arlington-Alexandria DC-MD-VA-WV MSA (Thousands of Jobs)

JURISDICTIONS	Year								Change 2005 - 2040	
	2005	2010	2015	2020	2025	2030	2035	2040	Number	Percentage
District of Columbia	750.2	786.0	822.9	868.3	897.9	924.0	950.1	977.2	226.9	30.2%
Arlington County	195.2	205.2	219.0	244.0	262.5	268.8	278.5	281.3	86.1	44.1%
City of Alexandria	105.8	108.9	117.7	124.1	135.4	142.3	153.6	160.4	54.7	51.7%
Central Jurisdictions	1,051.2	1,100.1	1,159.6	1,236.4	1,295.8	1,335.0	1,382.3	1,418.9	367.8	35.0%
Montgomery County a/ City of Rockville b/	500.0	506.0	540.0	585.0	628.0	673.0	703.0	723.0	223.0	44.6%
City of Gaithersburg b/	76.6	74.5	83.6	91.6	96.8	99.4	102.4	105.4	28.8	37.6%
Prince George's County	48.8	50.4	54.9	62.5	67.1	72.6	79.6	83.4	34.6	70.9%
Fairfax County	347.9	358.4	370.1	383.6	399.6	419.6	444.1	474.6	126.8	36.4%
City of Fairfax	601.9	641.3	684.8	743.6	781.4	812.2	837.6	861.7	259.8	43.2%
City of Falls Church	26.1	27.3	28.7	30.6	32.4	34.0	35.7	37.5	11.4	43.7%
Inner Suburbs	1,487.2	1,544.4	1,635.7	1,757.1	1,857.6	1,956.4	2,038.4	2,115.1	627.9	42.2%
Loudoun County	125.6	143.7	167.6	206.5	236.3	257.2	271.5	285.4	159.8	127.3%
Prince William County	113.1	115.4	134.8	155.3	174.8	195.9	217.8	240.8	127.7	112.8%
City of Manassas	23.3	24.6	27.3	28.8	30.3	31.8	33.3	34.8	11.5	49.1%
City of Manassas Park	3.0	4.5	4.6	4.7	4.8	4.9	5.0	5.1	2.2	73.0%
Stafford County c/	35.6	42.1	48.6	54.6	60.4	65.1	69.6	74.2	38.6	108.6%
Frederick County	122.2	142.4	151.5	158.3	136.5	167.3	171.1	175.1	52.9	43.3%
Charles County d/	58.6	62.2	68.4	71.7	74.7	77.5	80.3	83.1	24.5	41.9%
Calvert County d/	32.4	35.2	41.1	44.5	46.3	47.2	48.1	49.0	16.6	51.1%
Outer Suburbs	513.7	570.2	643.8	724.3	791.1	846.9	896.6	947.5	433.8	84.4%
MSA (1983) Total	3,052.1	3,214.7	3,439.1	3,717.8	3,944.6	4,138.3	4,317.3	4,481.6	1,429.5	46.8%
City of Fredericksburg c/	25.4	28.4	31.3	34.8	38.3	41.0	43.7	46.4	20.9	82.2%
Spotsylvania County c/	31.3	37.5	43.5	49.0	54.2	58.5	62.6	66.7	142.2	123.7%
Fauquier County	19.7	22.3	24.9	29.2	32.2	35.4	39.0	42.9	23.2	117.7%
Warren County e/	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Clarke County	4.7	5.1	5.4	5.7	6.0	6.4	6.7	7.1	2.4	50.0%
Jefferson County	14.8	16.8	18.8	20.8	22.6	24.5	26.4	28.5	13.8	93.1%
Outer Ring Jurisdictions	95.9	110.0	123.9	139.6	153.4	165.8	178.4	191.8	95.8	99.9%
MSA (2003) Total	3,148.1	3,324.7	3,563.0	3,857.4	4,097.9	4,304.1	4,495.7	4,673.4	1,525.3	48.5%

Draft 8.0 Cooperative Employment Forecast, 2005-2040



According to COG's Draft Round 8.0 Cooperative Forecasts, the inner suburbs and central jurisdictions will remain the region's employment center. In the year 2040, 30.3 percent of all jobs will be in the central jurisdictions, around 45.3 percent in the inner suburbs, 20.3 percent in the outer suburbs, and 4.1 percent in the outer ring jurisdictions.

Source: Draft Round 8.0 Cooperative Forecasts (063010). The COG Board of Directors will take action on the Draft Round 8.0 in November 2010.

Includes forecasts of military, self-employed, mining, and other jobs.

a/ Forecasts for years 2005 to 2040 include all of Takoma Park.

b/ Included in Montgomery County total.

c/ Source: GWRC/FAMPO Regional Demographic Control Forecasts for 2035 CLRP Socioeconomic Data, June 2008.

d/ Tri-County Council for Southern Maryland develops ten-year incremental population, housing unit, and employment forecasts for Calvert County, Charles County, and St. Mary's County.

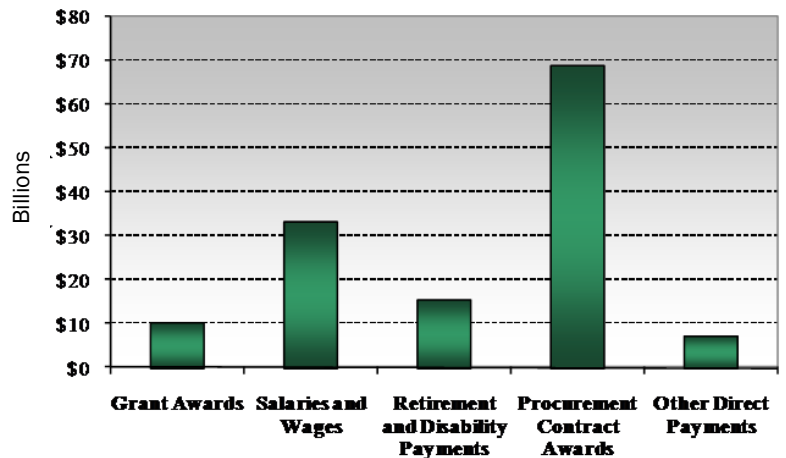
e/ Warren County does not participate in COG's Cooperative Forecasting Program.

Federal Spending

Federal spending in the Washington region increased to \$136.1 billion in FY 2008, from \$125.5 billion in 2007. More than 50.9 percent, or \$69.3 billion, came in procurement contract awards which, for the ninth time, exceeded expenditures in the region for salaries and wages. More than 31.9 percent of the region's federal spending was from the Department of Defense.

The central jurisdictions were home to more federal spending (\$65.4 billion) than either the inner suburbs or the outer suburbs. A majority of the federal spending occurred in the District of Columbia with more than \$47.2 billion. The inner suburbs received \$55.8 billion in federal spending with Fairfax County receiving \$21.8 billion. The outer suburbs received \$13.1 billion in federal spending with Prince William County receiving \$4.0 billion. The outer ring jurisdictions received \$1.9 billion in federal spending with Jefferson County receiving \$520 million.

Federal Spending for Selected Categories, FY 2008



Direct Federal Expenditures and Obligations
in the Washington-Arlington-Alexandria DC-MD-VA-WV MSA, by Jurisdiction, FY 2008
(Thousands of Dollars)

JURISDICTIONS	Grant Awards	Salaries and Wages	Retirement and Disability Payments	Procurement Contract Awards	Other Direct Payments	Total	2008 Total	
							Department of Defense	Non-Defense
District of Columbia	\$6,162,720	\$19,027,144	\$2,268,526	\$16,540,676	\$3,203,770	\$47,202,836	\$6,731,543	\$40,471,293
Arlington County	497,781	3,103,276	528,885	8,215,307	256,036	12,601,285	6,213,833	6,387,452
City of Alexandria	227,749	1,255,278	536,441	3,288,311	246,946	5,554,725	2,505,046	3,049,679
Central Jurisdictions	\$6,888,250	\$23,385,698	\$3,333,852	\$28,044,294	\$3,706,752	\$65,358,846	\$15,450,422	\$49,908,424
Montgomery County	1,437,074	3,997,250	2,593,361	7,954,761	1,078,934	17,061,380	3,051,261	14,010,119
Prince George's County	917,349	2,591,073	2,641,529	5,004,812	899,137	12,053,900	2,227,286	9,826,614
Fairfax County	443,762	1,338,530	2,605,047	16,979,596	481,132	21,848,067	12,863,263	8,984,804
City of Fairfax	203,639	78,657	295,706	1,914,777	80,195	2,572,974	1,248,641	1,324,333
City of Falls Church	18,867	416,754	67,435	1,652,951	63,950	2,219,957	1,529,980	689,977
Inner Suburbs	\$3,020,691	\$8,422,264	\$8,203,078	\$33,506,897	\$2,603,348	\$55,756,278	\$20,920,431	\$34,835,847
Loudoun County	75,236	343,068	479,086	2,909,238	75,036	3,881,664	2,616,178	1,265,486
Prince William County	120,488	573,930	757,407	2,460,174	102,397	4,014,396	2,837,079	1,177,317
City of Manassas	29,757	38,702	190,995	353,838	43,000	656,292	327,241	329,220
City of Manassas Park	11,326	133	5,467	-28,382	794	-10,662	-28,465	17,855
Stafford County	27,792	12,717	317,187	76,005	40,615	474,316	105,206	369,110
Frederick County	204,743	215,583	555,179	1,338,823	186,510	2,500,838	444,270	2,056,568
Charles County	88,025	147,574	492,241	245,467	128,831	1,102,138	434,793	667,345
Calvert County	45,495	10,802	288,015	16,390	73,540	434,242	52,906	381,336
Outer Suburbs	\$602,862	\$1,342,509	\$3,085,577	\$7,371,553	\$650,723	\$13,053,224	\$6,789,208	\$6,264,237
MSA (1983) Total	\$10,511,803	\$33,150,471	\$14,622,507	\$68,922,744	\$6,960,823	\$134,168,348	\$43,160,061	\$91,008,508
City of Fredericksburg	21,038	26,654	208,492	26,097	71,987	354,268	86,800	267,468
Spotsylvania County	28,485	6,024	237,902	80,691	34,610	387,712	92,249	295,463
Fauquier County	29,049	46,663	195,012	57,891	52,199	380,814	37,434	343,380
Warren County	16,247	14,796	105,201	5,850	34,496	176,590	7,127	169,463
Clarke County	8,272	3,853	42,399	9,031	14,698	78,253	2,635	75,618
Jefferson County	39,506	54,120	167,639	203,745	54,558	519,568	14,310	505,328
Outer Ring Jurisdictions	\$142,597	\$152,110	\$956,645	\$383,305	\$262,548	\$1,897,205	\$240,555	\$1,656,650
MSA (2003) Total	\$10,654,400	\$33,302,581	\$15,579,152	\$69,306,049	\$7,223,371	\$136,065,553	\$43,400,616	\$92,665,158

Source: U.S. Dept. of Commerce, Economics and Statistics Administration, Bureau of the Census, Consolidated Federal Funds Report, FY 2008.

NOTE: Grant locations represent location of initial recipient. Salary and wage locations represent place of employment. Procurement location is the place of performance, and other data are assigned to the recipient location. Figures may not sum to total due to rounding.

*Please Note: 2008 is the latest release year for federal spending data for the report.

Labor Force

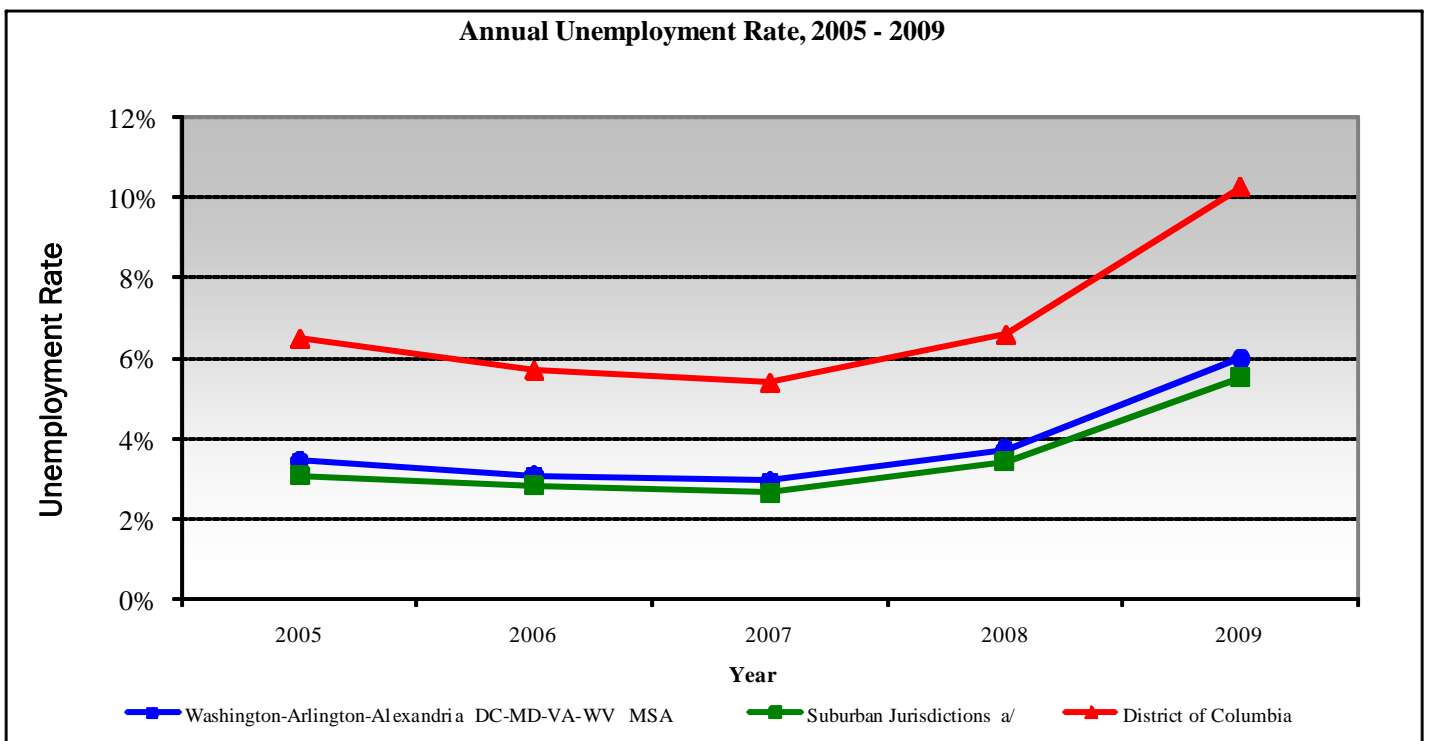
Between 2005 and 2009 the civilian labor force in the Washington region increased by 151,900 people, to a total of 3.05 million. Of that number, 2.87 million were employed and 182,900 were unemployed, putting the unemployment rate for the civilian labor force in the Washington region at 6.0 percent in 2009. The unemployment rate in the region has remained relatively steady between 2005 and 2007, but beginning in 2008 the rate has jumped to a high of 6.0 percent in 2009.

Unemployment in the District of Columbia, 10.2 percent in 2009, remained higher than in suburban jurisdictions, which averaged 5.5 percent.

Labor Force by Place of Residence in the Washington-Arlington-Alexandria DC-MD-VA-WV MSA, 2005 - 2009
(Thousands)

Jurisdictional Group	Structure Type	Year					Change 2005 - 2009	
		2005	2006	2007	2008	2009	Number	Percentage
Washington-Arlington-Alexandria DC-MD-VA-WV MSA	Civilian Labor Force	2,903.2	2,967.4	3,002.3	3,045.5	3,055.1	151.9	5.2%
	Employment	2,803.1	2,876.2	2,913.8	2,932.2	2,872.2	69.1	2.5%
	Unemployment	100.2	91.2	88.5	113.4	182.9	82.7	82.5%
	Unemployment Rate b/	3.4%	3.1%	2.9%	3.7%	6.0%		
Suburban Jurisdictions a/	Civilian Labor Force	2,583.9	2,645.2	2,674.2	2,711.4	2,723.1	111.1	4.3%
	Employment	2,504.5	2,572.4	2,603.4	2,620.0	2,574.3	69.8	2.8%
	Unemployment	79.5	72.8	70.8	91.4	148.9	69.4	87.3%
	Unemployment Rate b/	3.1%	2.8%	2.6%	3.4%	5.5%		
District of Columbia	Civilian Labor Force	319.3	322.2	328.1	334.1	332.0	12.7	4.0%
	Employment	298.6	303.8	310.4	312.2	297.9	-0.7	-0.2%
	Unemployment	20.7	18.4	17.7	22.0	34.0	13.3	64.3%
	Unemployment Rate b/	6.5%	5.7%	5.4%	6.6%	10.2%		

Annual Unemployment Rate, 2005 - 2009



Source: U.S. Department of Labor, Bureau of Labor Statistics.

Figures may not sum to total due to rounding.

a/ Includes all jurisdictions within the Washington-Arlington-Alexandria DC-MD-VA-WV MSA except the District of Columbia.

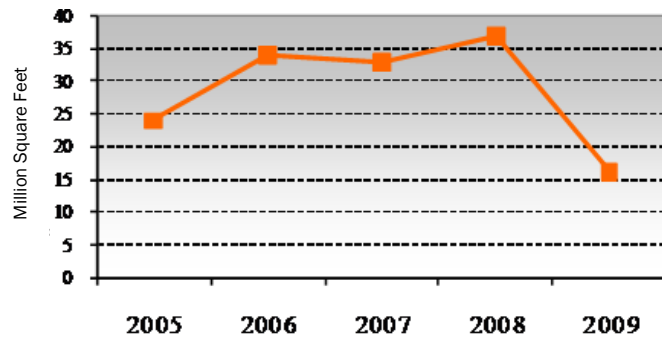
b/ Seasonally unadjusted

Construction

Commercial construction in the metropolitan Washington region decreased significantly during 2009, with developers breaking ground on more than 15.5 million square feet of space. In 2009, commercial construction in the region decreased from the 2008 total of 37.2 million, and was far below the 2000 total of 48.6 million. Fairfax County saw the most new commercial construction with more than 2.2 million square feet, followed by the city of Alexandria (2.1 million square feet) and Frederick County and Prince William County each with 1.9 million square feet.

The number of new, privately-owned housing units authorized in the region decreased from 13,732 in 2008 to 12,329 in 2009. Of the permits that were issued in 2009, more than 53 percent were in the outer suburbs.

Annual Commercial Construction Starts, 2005-2009



Total Square Feet of Commercial Construction Started by Jurisdiction, 2005-2009

JURISDICTIONS	Year					Total 2005-2009
	2005	2006	2007	2008	2009	
District of Columbia	3,978,259	6,508,477	4,861,953	9,771,919	1,655,645	26,776,253
Arlington County	586,032	1,625,386	652,561	1,652,187	1,237,503	5,753,669
City of Alexandria	367,606	384,258	977,102	755,513	2,103,290	4,587,769
Central Jurisdictions	4,931,897	8,518,121	6,491,616	12,179,619	4,996,438	37,117,691
Montgomery County	4,017,020	3,719,278	4,743,518	5,212,364	1,194,753	18,886,933
City of Gaithersburg*	550,814	398,029	176,978	576,784	470,026	2,172,631
City of Rockville*	1,066,919	1,054,320	623,671	1,820,755	171,477	4,737,142
City of Takoma Park*	4,996	0	0	33,385	0	38,381
Prince George's County	3,872,345	2,571,980	4,003,676	3,722,317	1,271,783	15,442,101
City of Bowie*	215,500	380,966	189,351	55,533	202,939	1,044,289
City of College Park*	0	358,526	126,500	401,577	200,000	1,086,603
City of Greenbelt*	0	0	106,340	45,300	0	151,640
Town of Bladensburg*	0	30,100	0	0	0	30,100
Fairfax County	2,993,703	7,410,803	6,621,567	7,418,104	2,297,769	26,741,946
City of Fairfax	262,487	0	139,000	12,000	25,000	438,487
City of Falls Church	169,000	11,850	0	43,300	0	224,150
Inner Suburbs	11,314,555	13,713,911	15,507,761	16,408,085	4,789,305	61,733,617
Loudoun County	2,792,474	3,674,313	3,682,756	3,618,528	1,560,250	15,328,321
Prince William County	2,476,152	3,859,302	4,698,227	2,624,200	1,922,876	15,580,757
City of Manassas	192,000	0	662,248	92,280	57,310	1,003,838
City of Manassas Park	0	0	0	0	0	0
Stafford County	a/	a/	a/	a/	a/	a/
Frederick County	2,099,670	3,801,012	962,153	2,034,393	1,946,721	10,843,949
City of Frederick*	550,160	2,025,257	519,513	1,046,780	1,484,929	5,626,639
Charles County	613,934	348,324	753,790	337,297	293,065	2,346,410
Calvert County	a/	a/	a/	a/	a/	a/
Outer Suburbs	8,174,230	11,682,951	10,759,174	8,706,698	5,780,222	45,103,275
MSA (1983) Total	24,420,682	33,914,983	32,758,551	37,294,402	15,565,965	143,954,583
City of Fredericksburg	a/	a/	a/	a/	a/	a/
Spotsylvania County	a/	a/	a/	a/	a/	a/
Fauquier County	a/	a/	a/	a/	a/	a/
Warren County	a/	a/	a/	a/	a/	a/
Clarke County	a/	a/	a/	a/	a/	a/
Jefferson County	a/	a/	a/	a/	a/	a/
Outer Ring Jurisdictions	a/	a/	a/	a/	a/	a/
MSA (2003) Total	24,420,682	33,914,983	32,758,551	37,294,402	15,565,965	143,954,583

*Starts in Maryland cities are included in appropriate county totals.

a/ The Commercial Construction Inventory does not include data for Calvert County, Stafford County, and the Outer Ring Jurisdictions.

Source: COG Commercial Construction Indicators 2009 Annual Summary, July 2010.

Construction

New Privately-Owned Housing Units Authorized in the Washington-Arlington-Alexandria DC-MD-VA-WV MSA, by Jurisdiction 2005 - 2009

JURISDICTIONS	2005		2006		2007		2008		2009	
	Total	Single Family	Total	Single Family	Total	Single Family	Total	Single Family	Total	Single Family
District of Columbia	2,860	125	2,105	126	1,910	576	536	248	1,126	151
Arlington County	1,275	166	2,960	203	2,121	151	1,179	119	614	156
City of Alexandria	1,017	195	1,050	137	354	93	467	65	236	35
Central Jurisdictions	5,152	486	6,115	466	4,385	820	2,182	432	1,976	342
Montgomery County	3,591	1,700	3,031	1,237	3,459	1,408	1,476	997	862	862
City of Gaithersburg*	196	124	94	74	137	73	67	57	72	72
City of Rockville*	802	20	43	43	529	57	154	8	0	0
City of Takoma Park*	0	n/a	0	n/a	0	n/a	0	n/a	0	n/a
Prince George's County	3,425	3,255	3,033	2,918	2,183	1,462	1,306	1,264	1,259	811
City of Bowie*	0	n/a	0	n/a	0	n/a	0	n/a	0	n/a
City of College Park*	0	n/a	0	n/a	0	n/a	0	n/a	0	n/a
City of Greenbelt*	0	n/a	0	n/a	0	n/a	0	n/a	0	n/a
Town of Bladensburg*	0	n.a	0	n/a	0	n/a	0	n/a	0	n/a
Fairfax County	4,353	2,276	2,089	1,423	1,518	1,268	1,385	892	769	769
City of Fairfax	28	28	27	27	30	30	9	9	14	14
City of Falls Church	24	24	19	19	14	14	13	13	12	12
Inner Suburbs	11,421	7,283	8,199	5,624	7,204	4,182	4,189	3,175	2,916	2,468
Loudoun County	5,199	4,716	3,284	2,937	2,878	2,479	2,457	1,468	2,154	1,638
Prince William County	5,427	5,140	3,191	3,007	2,491	2,478	2,139	1,887	2,099	1,729
City of Manassas	154	154	137	137	95	95	55	55	40	40
City of Manassas Park	188	81	0	0	0	0	0	0	0	0
Stafford County	1,639	1,452	874	818	792	732	419	371	459	455
Frederick County	1,872	1,414	1,300	1,098	1,288	1,003	619	535	839	749
City of Frederick*	728	344	357	231	234	167	106	69	156	146
Charles County	1,309	931	1,327	1,114	908	671	706	435	714	558
Calvert County	488	488	305	305	333	333	252	252	260	260
Outer Suburbs	16,276	14,376	10,418	9,448	8,785	7,791	6,647	5,003	6,565	5,429
MSA (1983) Total	32,849	22,145	24,732	15,538	20,374	12,793	13,018	8,610	11,457	8,239
City of Fredericksburg	410	410	278	278	101	101	88	88	245	88
Spotsylvania County	1,665	1,511	1,266	1,174	588	580	131	131	258	258
Fauquier County	706	706	700	506	304	289	105	105	106	106
Warren County	398	398	348	348	245	245	127	127	66	66
Clarke County	221	221	80	80	58	56	44	41	24	24
Jefferson County	527	527	554	547	789	487	219	219	173	173
Outer Ring Jurisdictions	3,927	3,773	3,226	2,933	2,085	1,758	714	711	872	715
MSA (2003) Total	36,776	25,918	27,958	18,471	22,459	14,551	13,732	9,321	12,329	8,954

Source: U.S. Department of Commerce, Bureau of the Census, 2009 Annual Report, "Permit Authorized Construction in Permit-issuing Places by Metropolitan Area."

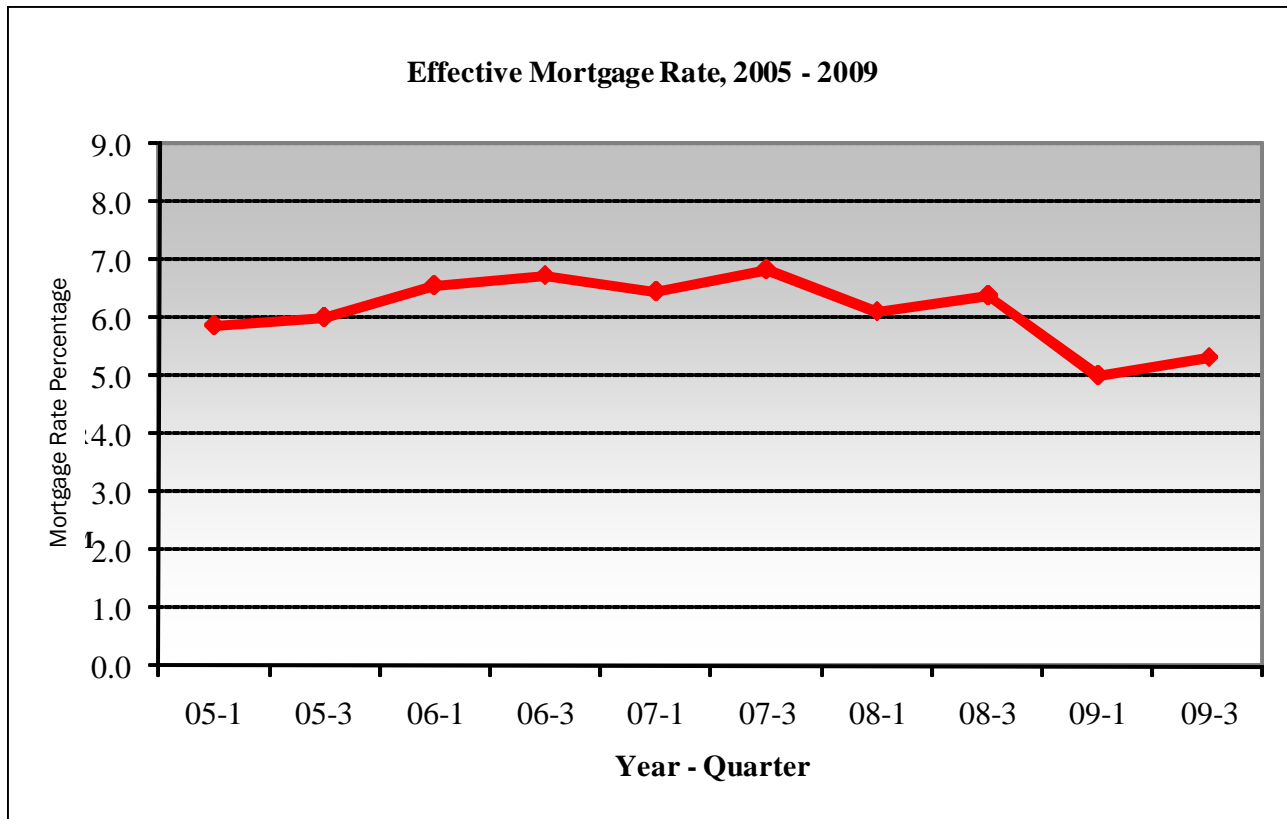
* Included in county total.

Mortgage Rates

Mortgage rates continued to edge down between 2005 and 2009 to a high of 5.3 percent in 2009 (third quarter). Average rates rose from 6.1 percent in 2005 to 5.1 percent in 2009.

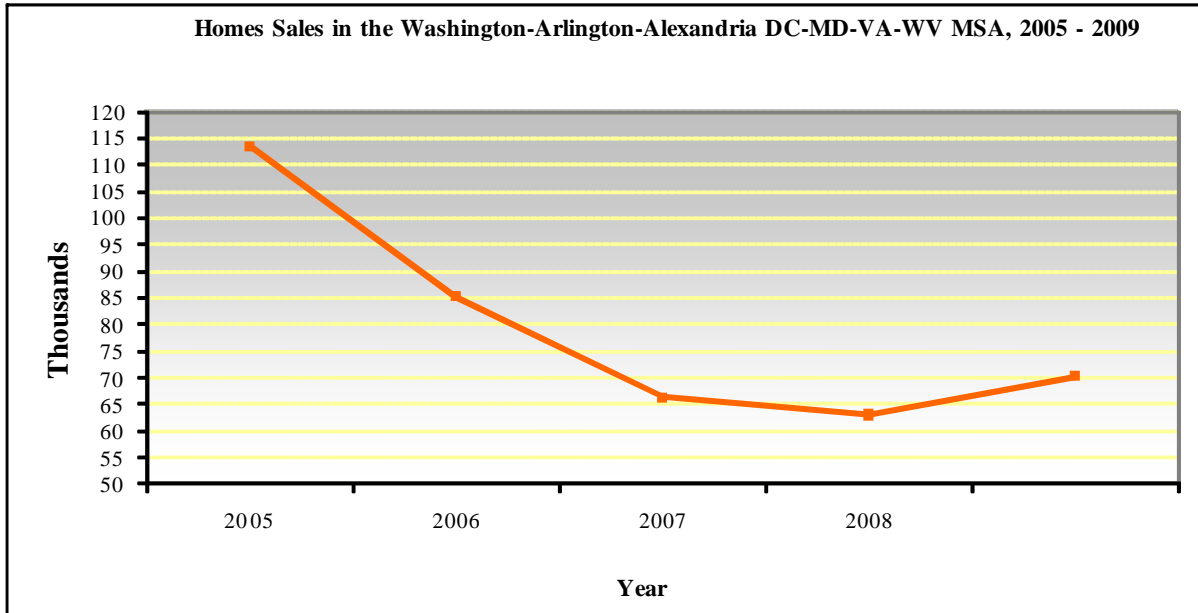
Terms on Conventional Home Mortgages, Average for Closed Loans
in the Washington-Baltimore DC-MD-VA-WV CMSA, 2005 - 2009

Quarter	Year				
	2005	2006	2007	2008	2009
First	5.9	6.6	6.5	6.1	5.0
Second	5.9	6.7	6.5	6.2	5.0
Third	6.0	6.7	6.8	6.4	5.3
Fourth	6.5	6.4	6.5	6.0	5.1



Source: Federal Housing Finance Board News Report. Terms on Conventional Home Mortgages, Table V -Averages for Major Metropolitan Areas: Loans Closed.

The number of homes sold in the region dropped dramatically between 2005 and 2009, from 113,544 units in 2005 to 70,355 units in 2009. Fairfax County had the most homes sold in the region in 2009, with 15,298.



Net Home Sales in the Washington-Arlington-Alexandria DC-MD-VA-WV MSA, by Jurisdiction, 2005 - 2009

JURISDICTIONS	Year					Change 2005 - 2009	
	2005	2006	2007	2008	2009	Number	Percentage
District of Columbia	9,179	7,751	7,422	5,563	6,438	-2,741	-29.9%
Arlington County	3,490	3,082	3,090	2,386	2,656	-834	-23.9%
City of Alexandria	3,256	2,544	2,286	1,829	1,989	-1,267	-38.9%
Central Jurisdictions	15,925	13,377	12,798	9,778	11,083	-4,842	-30.4%
Montgomery County	17,011	13,523	10,360	8,516	10,371	-6,640	-39.0%
Prince George's County	15,067	13,116	7,568	4,916	7,029	-8,038	-53.3%
Fairfax County	23,114	16,315	13,557	13,979	15,298	-7,816	-33.8%
City of Fairfax	424	292	283	271	294	-130	-30.7%
City of Falls Church	196	145	147	133	167	-29	-14.8%
Inner Suburbs	55,812	43,391	31,915	27,815	33,159	-22,653	-40.6%
Loudoun County	9,123	5,919	5,224	5,506	5,407	-3,716	-40.7%
Prince William County	11,920	7,302	5,127	9,243	8,743	-3,177	-26.7%
City of Manassas	1,194	708	435	1,092	861	-333	-27.9%
City of Manassas Park	480	267	148	507	434	-46	-9.6%
Stafford County	2,962	2,032	1,473	1,614	1,835	-1,127	-38.0%
Frederick County	4,672	3,712	2,680	2,159	2,565	-2,107	-45.1%
Charles County	3,157	2,727	1,895	1,269	1,379	-1,778	-56.3%
Calvert County	1,675	1,257	1,039	705	921	-754	-45.0%
Outer Suburbs	35,183	23,924	18,021	22,095	22,145	-13,038	-37.1%
MSA (1983) Total	106,920	80,692	62,734	59,688	66,387	-40,533	-37.9%
City of Fredericksburg	313	233	250	191	231	-82	-26.2%
Spotsylvania County	3,023	2,073	1,523	1,576	1,805	-1,218	-40.3%
Fauquier County	1,223	857	688	613	735	-488	-39.9%
Warren County	895	639	463	365	488	-407	-45.5%
Clarke County	234	160	125	122	114	-120	-51.3%
Jefferson County	936	734	549	525	595	-341	-36.4%
Outer Ring Jurisdictions	6,624	4,696	3,598	3,392	3,968	-2,656	-40.1%
MSA (2003) Total	113,544	85,388	66,332	63,080	70,355	-43,189	-38.0%

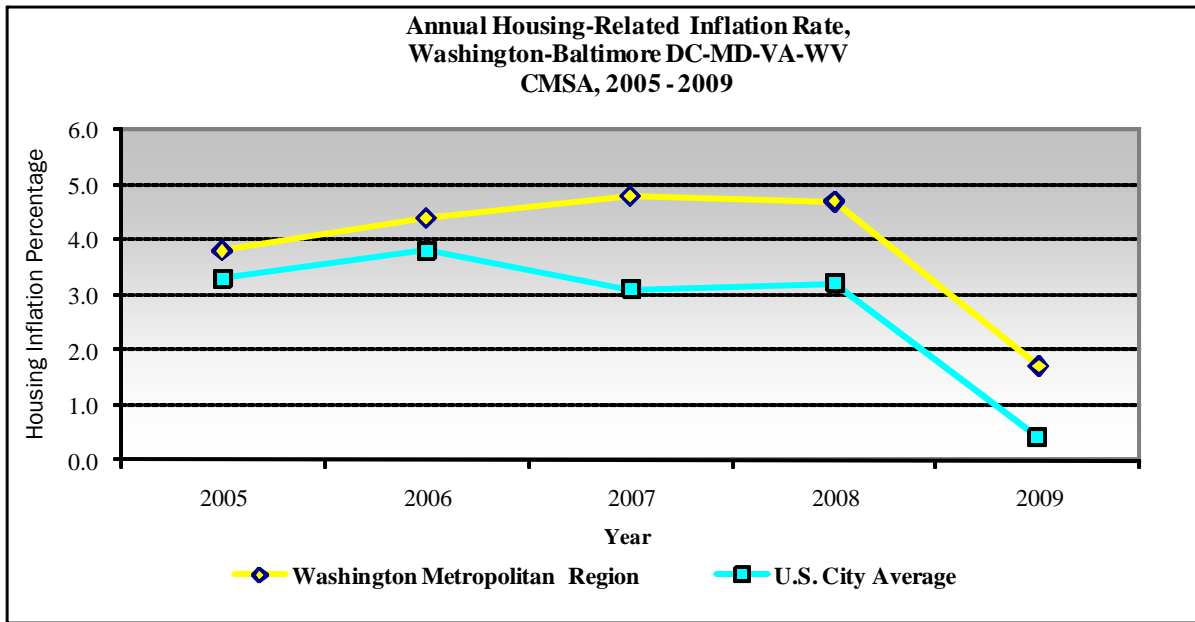
Source: Metropolitan Regional Information Systems, Inc., June 2010.

Housing-Related Inflation

The rate of change in the Consumer Price Index for housing in the Washington-Baltimore DC-MD-VA-WV CMSA decreased from 4.7 percent between 2007 and 2008 to 1.7 percent between 2008 and 2009. Nationally, housing inflation decreased during the same time frame. This measure accounts for price changes in rents and mortgage payments, owner costs, fuels, furnishings, and household supplies.

Housing Component of the Consumer Price Index*
All Urban Consumers, Washington-Baltimore DC-MD-VA-WV CMSA, 2005 - 2009

	Year				
	2005	2006	2007	2008	2009
Washington-Baltimore DC-MD-VA-WV CMSA					
CPI-U, Housing (Annual Average)	130.7	136.4	143.0	149.6	152.1
Housing Inflation Rate (%) - % Change	3.8	4.4	4.8	4.7	1.7
U.S. City Average					
CPI-U, Housing (Annual Average)	195.7	203.2	209.6	216.3	217.1
Housing Inflation Rate (%) - % Change	3.3	3.8	3.1	3.2	0.4



Source: U.S. Department of Labor, Bureau of Labor Statistics, "CPI Detailed Reports" for selected years.

For U.S. City Average, index is on a 1982-84=100 base.

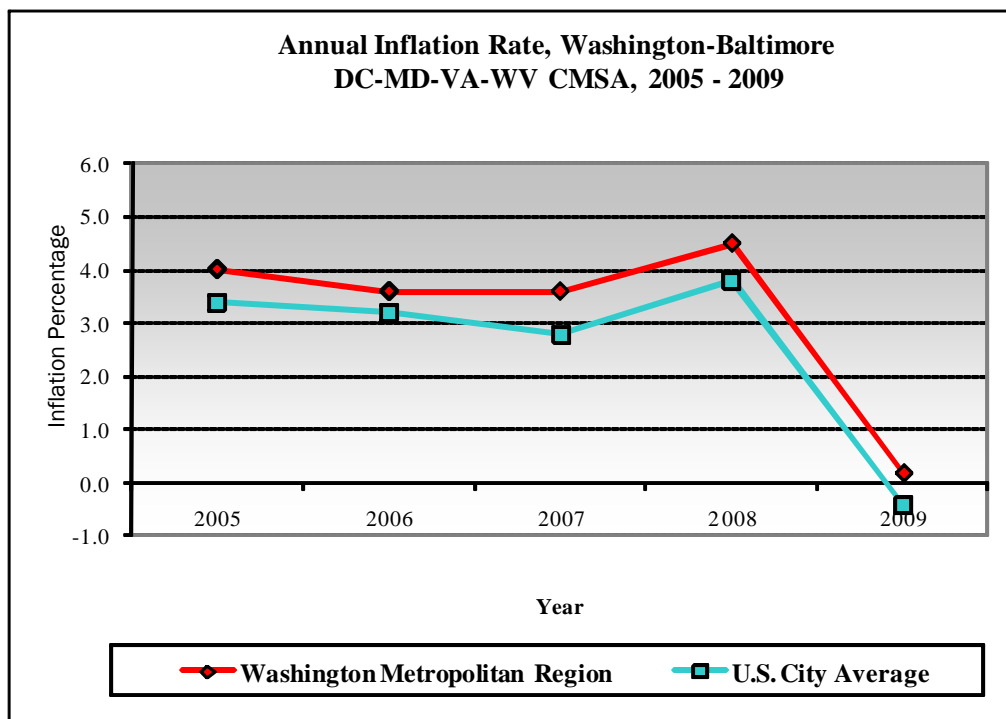
* CPI data for the Washington DC-MD-VA MSA was no longer published separately after December 1997. Beginning in 1998, the Washington metropolitan region became a component of the Washington-Baltimore DC-MD-VA-WV CMSA.

For Washington-Baltimore, index is on a November 1997 = 100 base.

The rate of change in the Consumer Price Index for All Urban Consumers (CPI-U) for the Washington-Baltimore DC-MD-VA-WV CMSA decreased from 4.5 percent between 2007 and 2008 to 0.2 percent between 2008 and 2009. Nationally, the rate of change decreased from 3.8 percent between 2007 and 2008 to -0.4 percent between 2008 and 2009.

**Consumer Price Index* and Inflation - All Urban Consumers
in the Washington DC-MD-VA-WV CMSA, 2005 - 2009**

	Year				
	2005	2006	2007	2008	2009
Washington-Baltimore DC-MD-VA-WV CMSA					
CPI-U (Annual Average)	124.3	128.8	133.5	139.5	139.8
Inflation Rate (%) - % Change	4.0	3.6	3.6	4.5	0.2
U.S. City Average					
CPI-U (Annual Average)	195.3	201.6	207.3	215.3	214.5
Inflation Rate (%) - % Change	3.4	3.2	2.8	3.8	-0.4



Source: U.S. Department of Labor, Bureau of Labor Statistics, "CPI Detailed Reports" for selected years.

For U.S. City Average, index is on a 1982-84=100 base.

* CPI data for the Washington DC-MD-VA MSA was no longer published separately after December 1997. Beginning in 1998, the Washington metropolitan region became a component of the Washington-Baltimore DC-MD-VA-WV CMSA.

For Washington-Baltimore, index is on a November 1996=100 base.

Income

Total personal income in the Washington region grew by an average annual rate of 6.3 percent between 2004 and 2008, leading to a 2008 total of \$305.6 billion. Total income growth was fastest in the outer suburbs, where income increased by an average of 8.3 percent per year.

On a per capita basis, income varied greatly by jurisdiction. Arlington County topped the region in per capita income at \$72,317. Jefferson County, WV had the lowest per capita income at \$36,889. The per capita income for the region was \$56,824 in 2008.

Total Personal Income in the Washington–Arlington–Alexandria, DC-MD-VA-WV MSA, by Jurisdiction, 2004 - 2008

(Thousands of Dollars)

JURISDICTIONS	Year					Avg. Annual Percentage Change 2004 2008
	2004	2005	2006	2007	2008	
District of Columbia	\$29,820,860	\$32,168,858	\$35,172,226	\$37,553,653	\$39,131,118	7.8%
Arlington County	11,709,018	12,605,920	13,624,824	14,610,378	15,200,658	7.5%
City of Alexandria	8,012,726	8,618,889	9,454,566	10,035,724	10,441,443	7.6%
Central Jurisdictions	\$49,542,604	\$53,393,667	\$58,251,616	\$62,199,755	\$64,773,219	7.7%
Montgomery County	52,392,771	56,016,278	60,472,607	62,901,647	64,403,687	5.7%
Prince George's County	28,222,982	29,518,546	30,412,449	31,658,181	32,761,012	4.0%
Fairfax County a/	60,711,811	65,331,356	69,215,469	72,330,171	73,716,386	5.4%
Inner Suburbs	\$141,327,564	\$150,866,180	\$160,100,525	\$166,889,999	\$170,881,085	5.2%
Loudoun County	9,344,756	10,766,422	12,277,900	13,690,330	14,701,535	14.3%
Prince William County b/	13,703,067	14,986,283	16,056,949	16,932,501	17,566,024	7.0%
Stafford County	3,699,510	4,032,565	4,301,889	4,653,501	4,813,261	7.5%
Frederick County	8,172,925	8,680,092	9,294,162	9,835,116	10,205,776	6.2%
Charles County	4,827,691	5,151,103	5,467,270	5,737,513	5,955,286	5.8%
Calvert County	3,089,394	3,291,470	3,501,026	3,705,299	3,836,426	6.0%
Outer Suburbs	\$42,837,343	\$46,907,935	\$50,899,196	\$54,554,260	\$57,078,308	8.3%
MSA (1983) Total	\$233,707,511	\$251,167,782	\$269,251,337	\$283,644,014	\$292,732,612	6.3%
Spotsylvania County c/	4,260,251	4,694,642	5,084,455	5,375,217	5,587,914	7.8%
Fauquier County	2,753,403	3,034,591	3,255,845	3,364,034	3,402,174	5.9%
Warren County	1,069,920	1,176,103	1,270,007	1,331,430	1,389,709	7.5%
Clarke County	471,546	502,849	549,738	558,628	566,593	5.0%
Jefferson County	1,481,397	1,592,137	1,745,654	1,860,892	1,915,824	7.3%
Outer Ring Jurisdictions	\$10,036,517	\$11,000,322	\$11,905,699	\$12,490,201	\$12,862,214	7.0%
MSA (2003) Total	\$243,744,028	\$262,168,104	\$281,157,036	\$296,134,215	\$305,594,826	6.3%

Source: U.S. Department of Commerce, Bureau of Economic Analysis, Regional Economic Information System. Data released April 22, 2010.

*Please Note: 2008 is the latest release year for income related data for the report.

a/ Data for the Cities of Fairfax and Falls Church are included in Fairfax County.

b/ Data for the Cities of Manassas and Manassas Park are included in Prince William County.

c/ Data for the City of Fredericksburg is included in Spotsylvania County.

Per Capita Income in the Washington–Arlington–Alexandria, DC-MD-VA-WV MSA, by Jurisdiction, 2004 - 2008

(Dollars)

JURISDICTIONS	Year					Avg. Annual Percentage Change 2004 - 2008	Ratio to MSA 2008
	2004	2005	2006	2007	2008		
District of Columbia	\$51,433	\$55,268	\$60,229	\$64,040	\$66,316	7.2%	116.7%
Arlington County	59,150	63,105	67,896	71,650	72,317	5.6%	127.3%
City of Alexandria	58,643	62,636	68,394	71,565	72,220	5.8%	127.1%
Central Jurisdictions	\$54,181	\$58,074	\$63,119	\$66,841	\$68,554	6.6%	120.6%
Montgomery County	56,889	60,303	64,665	66,811	67,531	4.7%	118.8%
Prince George's County	33,755	35,120	36,351	38,019	39,447	4.2%	69.4%
Fairfax County a/	58,971	63,106	67,033	69,556	69,885	4.6%	123.0%
Inner Suburbs	\$50,717	\$53,791	\$57,090	\$59,305	\$60,190	4.7%	105.9%
Loudoun County	39,402	42,499	46,290	49,342	50,674	7.2%	89.2%
Prince William County b/	35,908	38,053	40,158	41,607	42,620	4.7%	75.0%
Stafford County	32,659	34,563	36,318	38,521	39,424	5.2%	69.4%
Frederick County	37,765	39,560	41,861	43,716	45,054	4.8%	79.3%
Charles County	35,877	37,550	39,225	40,786	42,103	4.3%	74.1%
Calvert County	36,201	37,930	39,962	42,049	43,320	4.9%	76.2%
Outer Suburbs	\$36,664	\$38,857	\$41,296	\$43,332	\$44,561	5.4%	78.4%
MSA (1983) Total	\$47,996	\$50,933	\$54,287	\$56,688	\$57,798	5.1%	101.7%
Spotsylvania County c/	\$32,320	34,474	36,388	38,036	39,150	5.3%	68.9%
Fauquier County	43,976	47,204	49,554	50,655	50,597	3.8%	89.0%
Warren County	31,400	33,625	35,523	36,679	37,872	5.2%	66.6%
Clarke County	34,538	35,877	38,521	38,907	38,909	3.2%	68.5%
Jefferson County	31,501	32,828	35,091	36,472	36,889	4.3%	64.9%
Outer Ring Jurisdictions	\$34,707	\$36,919	\$39,009	\$40,368	\$41,072	4.6%	72.3%
MSA (2003) Total	\$47,251	\$50,135	\$53,401	\$55,737	\$56,824	5.1%	100.0%

Source: U.S. Department of Commerce, Bureau of Economic Analysis (BEA), Regional Economic Information System.
Data released April 22, 2010.

*Please Note: 2008 is the latest release year for income related data for the report.

a/ Data for the Cities of Fairfax and Falls Church are included in Fairfax County.

b/ Data for the Cities of Manassas and Manassas Park are included in Prince William County.

c/ Data for the City of Fredericksburg is included in Spotsylvania County.

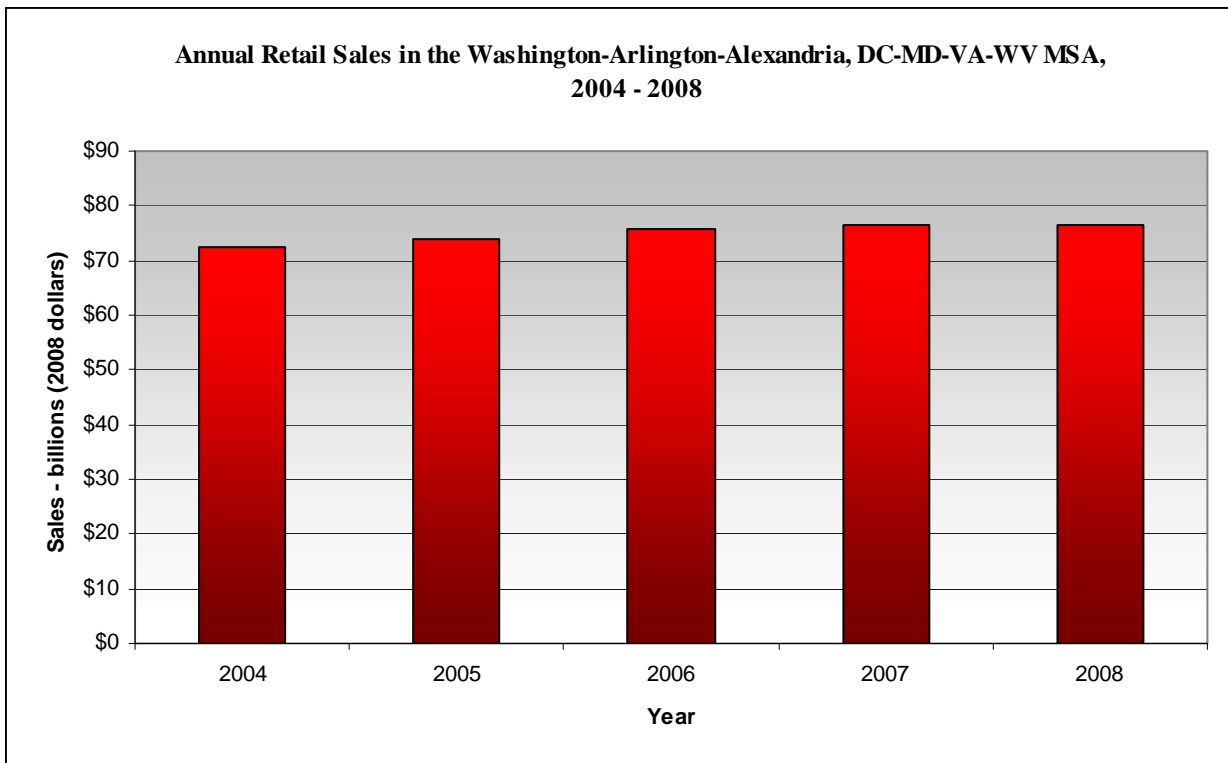
Retail Sales

Retail sales in the region increased in current terms between 2004 and 2008. The region's 2008 total of \$76.4 billion, when adjusted for inflation, was less than the total annual retail sales in 2007, \$76.6 billion, and more than the 2006 total of \$75.7 billion.

When adjusted for inflation, retail sales in the region increased by 5.6 percent between 2004 and 2008. Nationally, sales increased by 1.0 percent.

Estimated Total Annual Sales in the Washington-Arlington-Alexandria, DC-MD-VA-WV MSA, 2004 - 2008
(Millions of Dollars)

	Year					Change 2004 - 2008	
	2004	2005	2006	2007	2008	Number	Percentage
Washington DC-MD-VA PMSA							
Sales estimated (Current Dollars)	\$64,099	\$67,675	\$71,642	\$74,574	\$76,396	\$12,297	19.2%
Sales estimated (2008 dollars)	\$72,347	\$73,881	\$75,732	\$76,643	\$76,396	\$4,049	5.6%
United States							
Sales reported (Current Dollars)	\$3,474,340	\$3,687,364	\$3,869,536	\$3,994,823	\$3,959,957	\$485,617	14.0%
Sales reported (2008 dollars)	\$3,921,377	\$4,025,507	\$4,090,419	\$4,105,676	\$3,959,957	\$38,580	1.0%



Source: U.S. Department of Commerce, Bureau of the Census, Annual Benchmark Report for Retail Trade and Food Services: Sales and Inventories - January 1992 Through March 2009.

*Published data from the Census Bureau for retail sales for the Washington DC-MD-VA MSA is no longer available after 1996. Data for 2004 - 2008 are estimated by The Center for Regional Analysis, George Mason University.

Airline Passengers

More than 61 million passengers flew into or out of the Washington region's three major airports in 2009, a 4.4 percent decrease from 2005. Washington-Dulles International led the three airports in total airline passengers served, with 23.1 million. Nearly 21.0 million passengers passed through Baltimore-Washington International, while Reagan Washington National Airport served 17.6 million.

Number of Air Passengers Traveling to or from BWI, Dulles, and Reagan National Airports, 2005 - 2009
(Thousands of Passengers)

	Year					Change 2005 - 2009	
	2005	2006	2007	2008	2009	Passengers	Percentage
Baltimore-Washington International Thurgood Marshall Airport	19,742	20,699	21,044	20,489	20,954	1,212	6.1%
Washington-Dulles International Airport	26,843	22,813	24,525	23,704	23,074	-3,769	-14.0%
Ronald Reagan Washington National Airport	17,844	18,546	18,671	18,020	17,568	-276	-1.5%
Total Air Passengers	64,429	62,058	64,240	62,213	61,596	-2,833	-4.4%



Source: Office for Financial Analysis and Planning, Division of Aviation Statistics and Analysis, Maryland Aviation Administration, Maryland Department of Transportation, Monthly Statistical Report Summary Passengers and Cargo For the Month of December 2009 and Calendar Year 2009.

Economic Trends in Metropolitan Washington, 2005—2009

(Continued from front page)

Central Jurisdictions

The central jurisdictions are defined as the District of Columbia, Arlington County, and the City of Alexandria.

Inner Suburbs

The inner suburbs are Montgomery County, Prince George's County, Fairfax County, and the Cities of Fairfax and Falls Church.

Outer Suburbs

The outer suburbs are defined as Calvert County, Charles County, Frederick County, Loudoun County, Prince William County, Stafford County, and the Cities of Manassas and Manassas Park.

Outer Ring Jurisdictions

The outer ring jurisdictions are defined as Spotsylvania County, Fauquier County, Warren County, Clarke County, Jefferson County and the City of Fredericksburg.

Washington Primary Metropolitan Statistical Area (PMSA) and Consolidated Metropolitan Statistical Area (CMSA)

As a result of the 1990 Census, Office of Management and Budget has modified the definition of metropolitan areas for federal statistical purposes. Under this definition the Washington PMSA, the Baltimore PMSA and the Hagerstown PMSA have been combined into a new Consolidated Metropolitan Statistical Area (CMSA) - Washington-Baltimore DC-MD-VA-WV CMSA. The individual PMSAs are expanded and separately recognized as PMSAs. Unless otherwise noted, this report uses the 2003 definition of the MSA.

Washington DC-MD-VA Metropolitan Statistical Area (MSA)

As defined by the Office of Management and Budget (OMB) in 1983, extends beyond the membership of the COG to include Calvert and Charles counties in Maryland; and Stafford County in Virginia.



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