NEW PRELIMINARY 2023 QCEW QUARTER DATA AND ANNUAL AVERAGE

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Cooperative Forecasting and Data Subcommittee
July 9, 2024

Metropolitan Washington
Council of Governments

2023 QCEW Data

Preliminary 2023 QCEW Quarters and Annual

Jurisdiction	1st Qtr. Average	2nd Qtr. Average	3rd Qtr. Average	4th Qtr. Average	2023 Annual
District of Columbia	750,751	760,064	758,426	761,867	757,777
Arlington County	176,638	178,783	180,537	181,018	179,244
City of Alexandria	81,465	81,632	81,028	81,155	81,320
Montgomery County	454,508	459,702	457,330	461,407	458,237
Prince George's County	312,509	319,513	319,855	321,389	318,316
Fairfax County	622,108	631,136	631,893	632,377	629,379
City of Fairfax	22,747	23,342	23,626	23,815	23,383
City of Falls Church	11,893	12,202	12,269	12,427	12,198
Loudoun County	184,320	188,941	190,832	192,030	189,030
Prince William County	135,564	140,621	140,874	141,386	139,611
City of Manassas	24,580	24,853	24,867	24,791	24,773
City of Manassas Park	4,436	4,448	4,386	4,059	4,332
Charles County	40,602	41,756	41,230	41,823	41,353
Frederick County	104,265	106,340	104,782	105,703	105,703
COG Region	**2,926,385**	**2,973,332**	**2,971,936**	**2,985,247**	**2,964,656**

QCEW Annual Averages

2018 – 2023 Annual Averages

Jurisdiction	2018	2019	2020	2021	2022	2023
District of Columbia	771,750	776,041	726,083	725,826	748,737	757,777
Arlington County	178,158	182,197	174,422	172,234	174,381	179,244
Alexandria City	91,915	90,924	83,919	84,081	84,602	81,320
Montgomery County	470,884	472,495	439,259	446,524	453,270	458,237
Prince George's County	320,443	322,168	295,521	301,912	311,391	318,316
Fairfax County	612,537	622,226	591,639	607,242	620,691	629,379
City of Fairfax	19,714	19,665	18,024	18,862	21,750	23,383
City of Falls Church	12,447	12,249	10,899	11,443	11,553	12,198
Loudoun County	169,077	175,497	165,166	172,484	180,628	189,030
Prince William County	130,335	133,237	125,254	130,075	133,867	139,611
City of Manassas	22,303	23,204	22,409	23,194	23,902	24,773
City of Manassas Park	3,653	3,741	3,738	3,974	4,411	4,332
Charles County	41,392	41,505	38,436	39,327	40,389	41,353
Frederick County	103,232	105,170	96,984	99,681	102,282	105,703
COG Region	2,947,840	2,980,319	2,791,753	2,836,859	2,911,854	2,964,656

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Loss of ~189,000 jobs between 2019 and 2020

Job Gain of ~173,000 jobs between 2020 and 2023

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2019 and 2020 Annual Average QCEW Data

Jurisdiction	2019	2020	Job Loss	% Loss
District of Columbia	776,041	726,083	-49,958	-6.4%
Arlington County	182,197	174,422	-7,775	-4.3%
Alexandria City	90,924	83,919	-7,005	-7.7%
Montgomery County	472,495	439,259	-33,236	-7.0%
Prince George's County	322,168	295,521	-26,647	-8.3%
Fairfax County	622,226	591,639	-30,587	-4.9%
City of Fairfax	19,665	18,024	-1,641	-8.3%
City of Falls Church	12,249	10,899	-1,350	-11.0%
Loudoun County	175,497	165,166	-10,331	-5.9%
Prince William County	133,237	125,254	-7,983	-6.0%
City of Manassas	23,204	22,409	-795	-3.4%
City of Manassas Park	3,741	3,738	-3	-0.1%
Charles County	41,505	38,436	-3,069	-7.4%
Frederick County	105,170	96,984	-8,186	-7.8%
COG Region	2,980,319	2,791,753	-188,566	-6.3%

Jurisdictional Job Loss between 2019 and 2020

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2020 and 2023 Annual Average QCEW Data

Jurisdiction	2020	2023	Job Gain	% Gain
District of Columbia	726,083	757,777	31,694	4.4%
Arlington County	174,422	179,244	4,822	2.8%
Alexandria City	83,919	81,320	-2,599	-3.1%
Montgomery County	439,259	458,237	18,978	4.3%
Prince George's County	295,521	318,316	22,795	7.7%
Fairfax County	591,639	629,379	37,740	6.4%
City of Fairfax	18,024	23,383	5,359	29.7%
City of Falls Church	10,899	12,198	1,299	11.9%
Loudoun County	165,166	189,030	23,864	14.4%
Prince William County	125,254	139,611	14,357	11.5%
City of Manassas	22,409	24,773	2,364	10.5%
City of Manassas Park	3,738	4,332	594	15.9%
Charles County	38,436	41,353	2,917	7.6%
Frederick County	96,984	105,703	8,719	9.0%
COG Region	2,791,753	2,964,656	172,903	6.2%

Jurisdictional Job Gain between 2020 and 2023

Job Recovery Ratio

Jurisdiction	Dec-19	Dec-23	Ratio
District of Columbia	782,927	759,939	97%
Arlington County	184,898	181,113	98%
Alexandria City	91,168	80,973	89%
Montgomery County	477,794	462,135	97%
Prince George's County	326,268	322,609	99%
Fairfax County	631,991	632,599	100%
City of Fairfax	19,593	23,749	121%
City of Falls Church	12,144	12,440	102%
Loudoun County	177,972	192,547	108%
Prince William County	134,141	141,443	105%
City of Manassas	23,402	24,811	106%
City of Manassas Park	3,737	3,942	105%
Charles County	42,836	42,172	98%
Frederick County	105,819	107,710	102%
COG Region	3,014,690	2,988,182	99%

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QCEW Monthly Data (COG Region) January 2019 – December 2023

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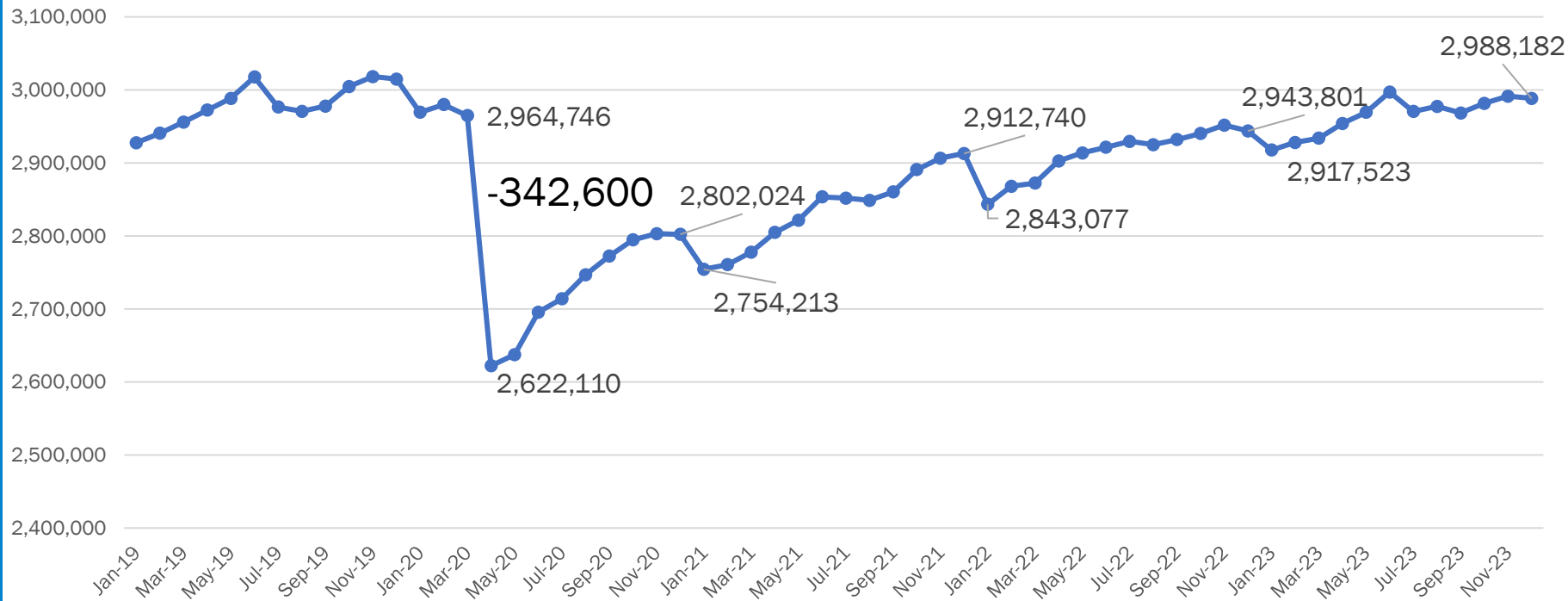
Preliminary 2023 QCEW Data

COG Region

2,964,656	QCEW Jobs (New 2023 Preliminary Estimate)
1.02	CES Adjustment Factor (Same as 2022)
1.06	Self-Employment Factor (Same as 2022)
63,940	Military Jobs (Same as 2022)

~3,385,792   Total Jobs for 2023

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Preliminary 2023 QCEW Data

- Round 10.0 Cooperative Forecasts are being used for the Visualize 2050 Plan Update.
- The final product using the Round 10.0 Cooperative Forecasts is the development of the Activity Centers Map update (completion fall of 2024)

Next Steps:

Later in the fall –

- Examine QCEW Data NAICS specific sectors

- Analyze and compare 2023 employment estimate with the Round 10.0 employment forecasts

- Future Committee Discussion - Are we meeting our short-term employment forecasts?

US CENSUS BUREAU'S POPULATION ESTIMATES FOR THE COG REGION VINTAGE 2023

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Annual Estimates of the Resident Population: April 1, 2020 to July 1, 2023

Geographic Area	April 1, 2020 Estimates Base	Population Estimate (as of July 1)			
		2020	2021	2022	2023
District of Columbia	689,548	670,839	669,037	670,949	678,972
Charles County, Maryland	166,621	166,741	168,927	170,111	171,973
Frederick County, Maryland	271,710	272,786	280,647	287,540	293,391
Frederick city, Maryland	78,190	78,360	79,962	82,292	85,793
Montgomery County, Maryland	1,062,065	1,060,904	1,056,193	1,053,067	1,058,474
Gaithersburg city, Maryland	69,640	69,484	69,177	68,984	69,563
Rockville city, Maryland	67,104	67,334	67,227	66,947	67,297
Takoma Park city, Maryland	17,636	17,602	17,489	17,412	17,464
Prince George's County, Maryland	967,215	965,365	956,451	946,980	947,430
Bladensburg town, Maryland	9,662	9,642	9,546	9,446	9,446
Bowie city, Maryland	58,340	58,242	57,737	57,192	57,254
College Park city, Maryland	34,749	34,698	34,502	34,186	34,187
Greenbelt city, Maryland	24,922	24,869	24,622	24,359	24,360
Hyattsville city, Maryland	21,188	21,139	20,916	20,677	20,662
Laurel city, Maryland	30,068	29,983	29,555	29,353	29,400
Arlington County, Virginia	238,642	238,814	233,436	233,678	234,162
Fairfax County, Virginia	1,150,294	1,148,627	1,142,203	1,139,309	1,141,878
Loudoun County, Virginia	420,957	422,705	428,764	432,792	436,347
Prince William County, Virginia	482,200	482,834	485,352	487,012	489,640
Alexandria city, Virginia	159,464	159,139	155,105	155,045	155,230
Fairfax city, Virginia	24,147	24,177	24,353	24,752	25,144
Falls Church city, Virginia	14,661	14,681	14,516	14,489	14,685
Manassas city, Virginia	42,773	42,692	42,764	42,673	42,696
Manassas Park city, Virginia	17,217	17,162	17,089	16,693	16,361
COG Region	**5,707,514**	**5,687,466**	**5,674,837**	**5,675,090**	**5,706,383**

Vintage 2023 data products are associated with Data Management System projects P-6000042, P-7501659, and P-7527355. The U.S. Census Bureau reviewed these data products for unauthorized disclosure of confidential information and approved the disclosure avoidance practices applied to this release (CBDRB-FY24-0085).

Note: The estimates are developed from a base that integrates the 2020 Census, Vintage 2020 estimates, and 2020 Demographic Analysis estimates. For population estimates methodology statements, see https://www.census.gov/programs-surveys/popest/technical-documentation/methodology.html. All geographic boundaries for the 2023 population estimates series are as of January 1, 2023.

Annual Estimates of the Resident Population: April 1, 2020 to July 1, 2023

Based on the latest Census Bureau's Population Estimate (as of July 1) 2023:

COG Region:

2020 (July 1, 2020) – 5.69 million people

2023 (July 1, 2023) – 5.71 million people

Based on the Round 10.0 Cooperative Forecasts:

COG Region:

2020 – 5.73 million people

2025 – 5.95 million people

Census Population Estimate Comparison with Round 10.0

Create a 2023 population estimate with the Round 10.0 Cooperative Forecasts:

2020 – 5.73 million people

2025 – 5.95 million people

2023 Population Estimate (Round 10.0 Cooperative Forecasts)

Formula (2025 Population – 2020 Population) = Growth Increment between 2020 and 2025 (222.9 Thousand People)

One Year of Growth Increment = Five years/222.9 Thousand People (Assuming the same amount growth for each year)

~44.6 Thousand People

Census Population Estimate Comparison with Round 10.0

Year 2023 represents three years of increment of population growth

~44.6 Thousand People * 3 Years = ~133.8 Thousand People

Add to 2020 Population Regional Population (5.73 Million People)

Round 10.0 Cooperative Forecasts = 2023 Population ~5.87 Million People

Census Population Estimate Comparison with Round 10.0

Round 10.0 Cooperative Forecasts = 2023 Population ~5.87 Million People

US Census Bureau Population Estimate for 2023 = 5.71 Million People

Difference of about 160,000 people or 2.7%

Census Population Estimate Comparison with Round 10.0

Difference of about 160,000 people or 2.7%

Findings:

- Year 2023 for Round 10.0 is a little more optimistic than the Census Population estimate for July 1, 2023

- Round 10.0 population forecast was developed during the fall of 2022

- It's now approaching the fall of 2024 – should we think about own individual jurisdictional forecasts and determine if the short-term still seem reasonable?

- What are we seeing at the jurisdictional level? [e.g. school enrollment, migration trends, or building permit activity] Do the short-term population forecasts and year 2025 still seem reasonable?

Census Population Estimate Comparison with Round 10.0

==Open Discussion about Census Estimates and future update to the Round 10.0 Cooperative Forecast==

- Round 10.0 Cooperative Forecasts are being used for the Visualize 2050 Plan Update.
- The final product using the Round 10.0 Cooperative Forecasts is the development of the Activity Centers Map update (completion fall of 2024)

Next Data Steps:

- The need to look at the Census Estimates Data - Components of Residential Population Change (especially net migration trends international/domestic)
- Other data points – Other Census products (most recent ACS results)
- Future presentations to help inform the committee.
- Discussion for later in the fall.

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