

**Economic Trends in
Metropolitan Washington
1998 - 2002**

July 9, 2003

**Metropolitan Washington Council of Governments
Department of Human Services, Planning, and Public Safety**



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AGENCY: The Metropolitan Washington Council of Governments (COG) is the regional organization of the Washington area's major local governments and their elected officials. COG works toward solutions on such regional issues as growth, transportation, affordable housing, air pollution, water supply, water quality, and economic development. COG serves as the regional planning organization for metropolitan Washington.

**REPORT
ABSTRACT:** This report provides information on the Washington, D.C., region's population, employment, federal spending, construction, retail sales, inflation, mortgage rates, and number of passengers served by the area's major airports.

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Economic Trends in Metropolitan Washington, 1998 - 2002

Population - The region grew by more than 409,100 people between 1998 and 2002. The inner suburbs grew the most in terms of the absolute number of people, but the outer suburbs had the greatest percentage increase in population. According to COG's Draft Round 6.3 Cooperative Forecasts, the number of people in the region will grow by more than 34 percent by the year 2030.

Employment - After increasing from 2.32 million jobs in 1997 to 2.37 million in 1998, the number of jobs in the area rose to 2.58 million in 2002. According to COG's Draft Round 6.3 Cooperative Forecasts, the number of jobs in the region will grow by more than 46.3 percent by the year 2030.

Federal Spending - The federal government spent \$87.5 billion in the region in 2002, up from \$79.2 billion in 2001. For the sixth time, local federal procurement exceeded salaries and wages. The District of Columbia was home to \$33.5 billion of federal spending, Northern Virginia received \$31 billion, and suburban Maryland received \$22.9 billion.

Labor Force - Between 1998 and 2002, unemployment in the region's workforce increased from 3.2 percent to 3.7 percent. Unemployment in the District of Columbia, at 6.4 percent in 2002, remained higher than in the suburban jurisdictions, which averaged 3.3 percent.

Construction - Construction in the metropolitan Washington region increased slightly during 2002. Developers broke ground on nearly 33.6 million square feet of commercial projects — an increase of nearly 1.4 million square feet from 2001. Led by Loudoun County, local governments issued building permits for more than 34,967 new housing units, up slightly from 2001.

Mortgage Rates, Home Sales, and Housing-Related Inflation – Mortgage rates continued to fall in 2002 to a low of 6.2 percent (fourth quarter), averaging approximately 6.7 percent for the year. The number of homes sold in the region was nearly 93,053 in 2002. Housing-related inflation, as measured by the housing component of the Consumer Price Index for All Urban Consumers (CPI-U), decreased from 3.8 percent between 2000 and 2001 to 2.4 percent between 2001 and 2002.

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 declined from 2.6 percent between 2000 and 2001 to 2.4 percent between 2001 and 2002. The decline was due to lower costs of apparel and transportation (motor fuel).

Income - Total personal income in the Washington region grew by an average of 8.4 percent per year between 1997 and 2001, leading to a 2001 total of \$199.5 billion. On a per capita basis, 2001 income varied greatly by jurisdiction, with a regional average of \$42,726.

Retail Sales - Retail sales in the region increased both in current and real terms between 1998 and 2002. The area's 2002 total annual retail sales of \$60.5 billion was slightly greater than the total in 2001 of \$59.5 billion, and slightly more than the 2000 total of \$60.2 billion.

Airline Passengers - More than 49 million passengers flew into or out of the Washington region's three major airports in 2002, a 5.4 percent increase from 1998.

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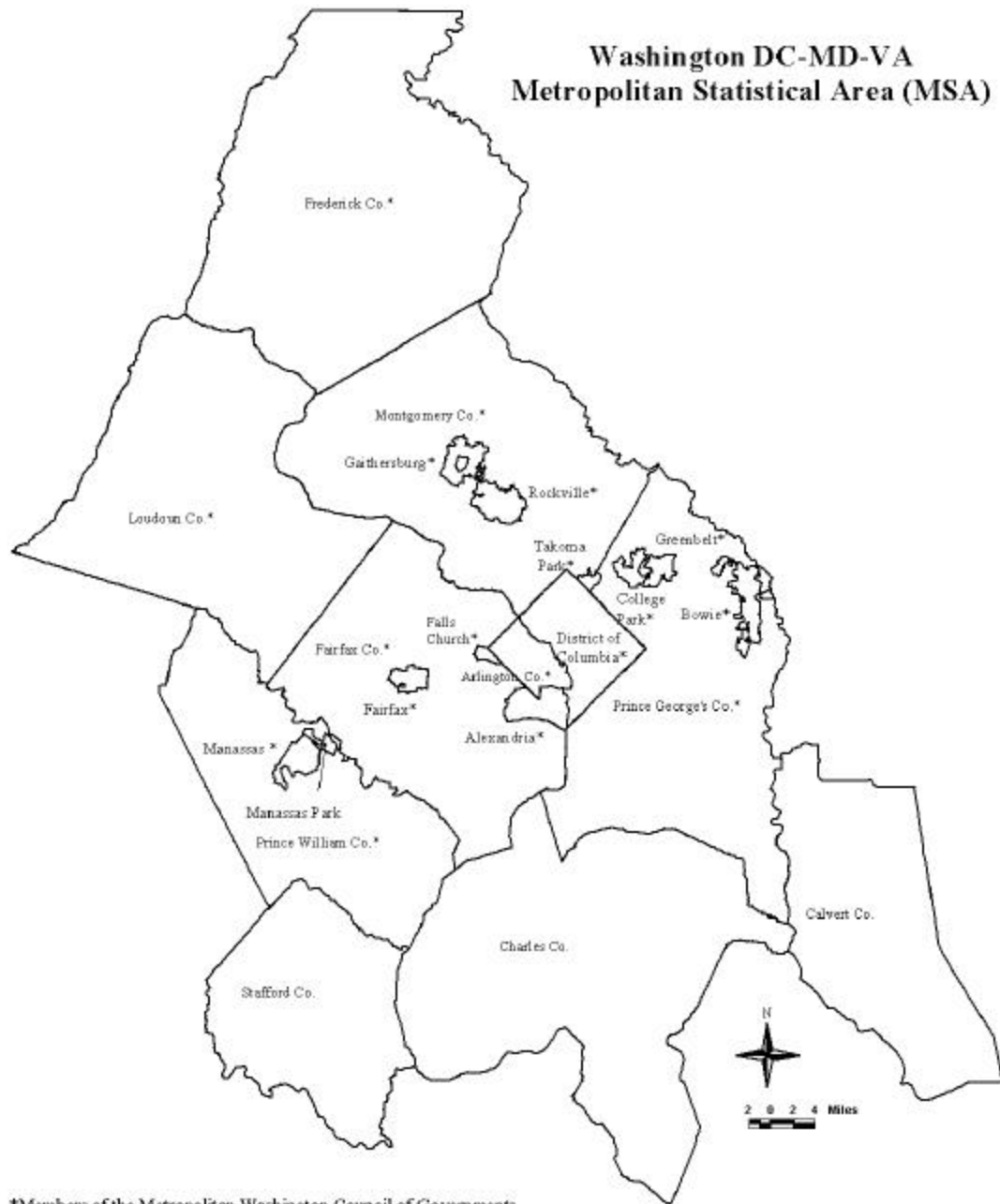
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MAP OF THE WASHINGTON DC-MD-VA MSA



*Members of the Metropolitan Washington Council of Governments MSA as defined by the U.S. Office of Management and Budget, 1983

Overview of Economic Trends in Metropolitan Washington, 1998 - 2002

INTRODUCTION

Economic Trends in Metropolitan Washington is an annual publication of the Metropolitan Washington Council of Governments. This year's report focuses on economic trends between the years 1998 and 2002, and is divided into sections covering population, employment, federal expenditures and obligations, labor force, construction, retail sales, mortgage rates and home sales, personal income, inflation, and transportation.

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

The Membership of the Metropolitan Washington Council of Governments (Jurisdictions with an asterisk in the map)

Members of the Metropolitan Washington Council of Governments are the District of Columbia; Frederick County, Montgomery County, Prince George's County, and the Cities of Bowie, College Park, Gaithersburg, Greenbelt, Rockville, and Takoma Park in Maryland; and Arlington County, Fairfax County, Loudoun County, Prince William County, and the Cities of Alexandria, Fairfax, Falls Church, and Manassas in Virginia.

The Washington DC-MD-VA Metropolitan Statistical Area (MSA) (see map), as defined by the Office of Management and Budget in 1983, extends beyond the membership of the Council of Governments. It includes the District of Columbia; Calvert County, Charles County, Frederick County, Montgomery County, and Prince George's County in Maryland; and

Arlington County, Fairfax County, Loudoun County, Prince William County, Stafford County, and the Cities of Alexandria, Fairfax, Falls Church, Manassas, and Manassas Park in Virginia. Note that different data items are available for different levels of geographic specificity. See Appendix A for more details.

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.

Washington Primary Metropolitan Statistical Area (PMSA)

As a result of the 1990 Census, the Office of Management and Budget (OMB) has modified the definition of metropolitan areas for federal statistical purposes. Under the new definition, the Washington PMSA, the Baltimore PMSA, and the Hagerstown PMSA have been combined into a new Consolidated Metropolitan Statistical Area (CMSA). The individual PMSAs are now expanded and separately recognized as PMSAs. Unless otherwise noted, this report continues to use the 1983 OMB definition of the MSA.

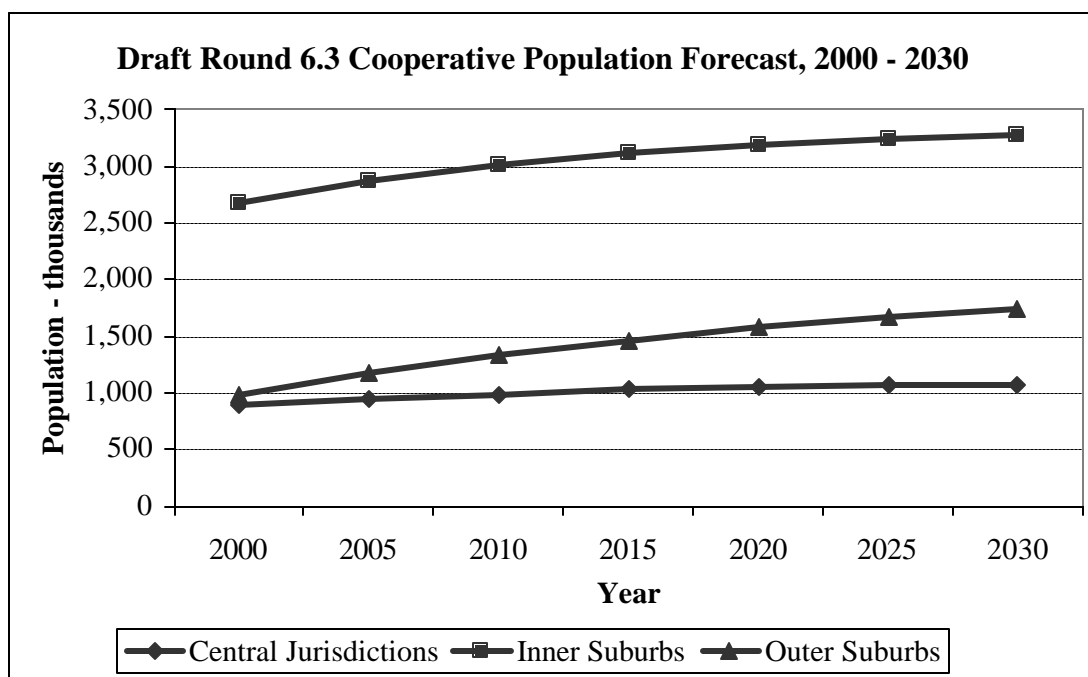
OVERVIEW

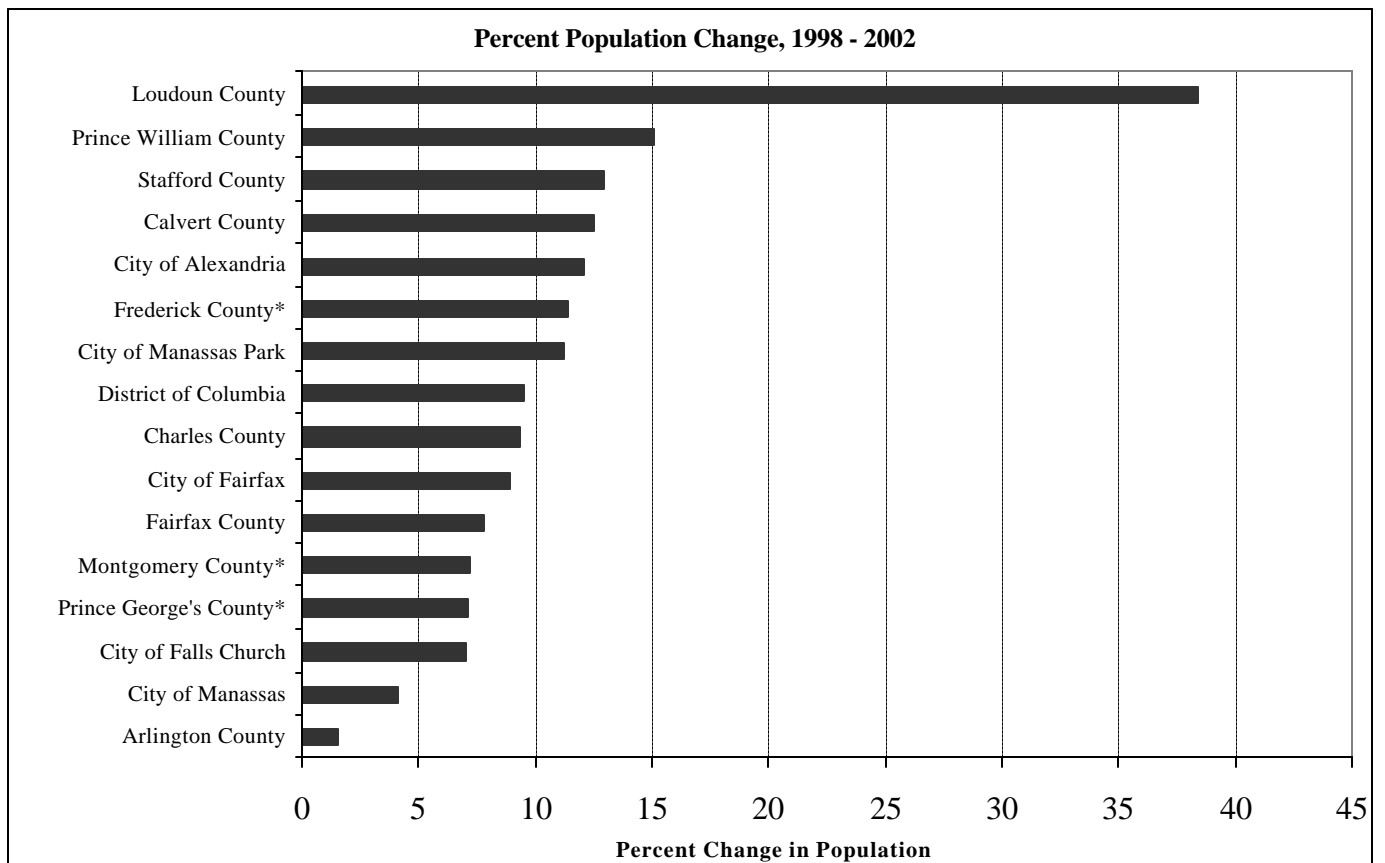
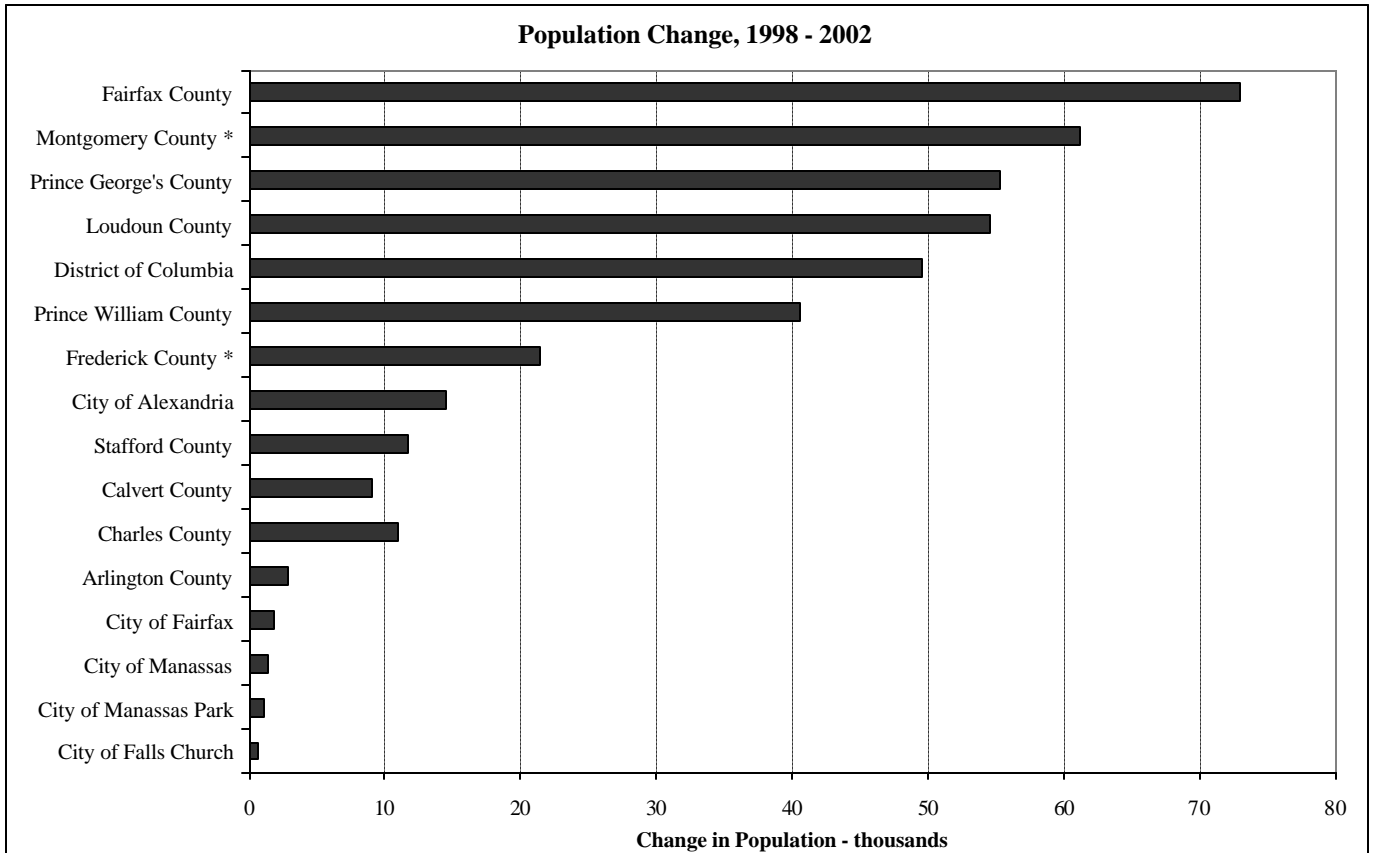
POPULATION

The region grew by more than 409,100 people between 1998 and 2002. The majority of this growth in absolute numbers occurred in the region's inner suburbs, which increased by 191,700 people or 7.4 percent. The region's central jurisdictions had a net gain of 66,800 people, or 8.1 percent. The outer suburbs had the greatest percentage increase in the region, 16.3 percent, with the addition of 150,600 people.

Despite the dramatic growth rate in the outer suburbs, population remains anchored in the inner suburbs, where 59 percent of the region's population lives.

According to COG's Draft Round 6.3 Cooperative Forecasts, the inner suburbs will remain the most populous "ring" of the region well into the next decade. COG forecasts that in the year 2030, the region will hold more than 6.1 million people (34 percent more than the 2000 population). A full 54 percent of the 2030 population is expected to live in the inner suburbs.





*Data for Maryland cities are included in appropriate county totals.

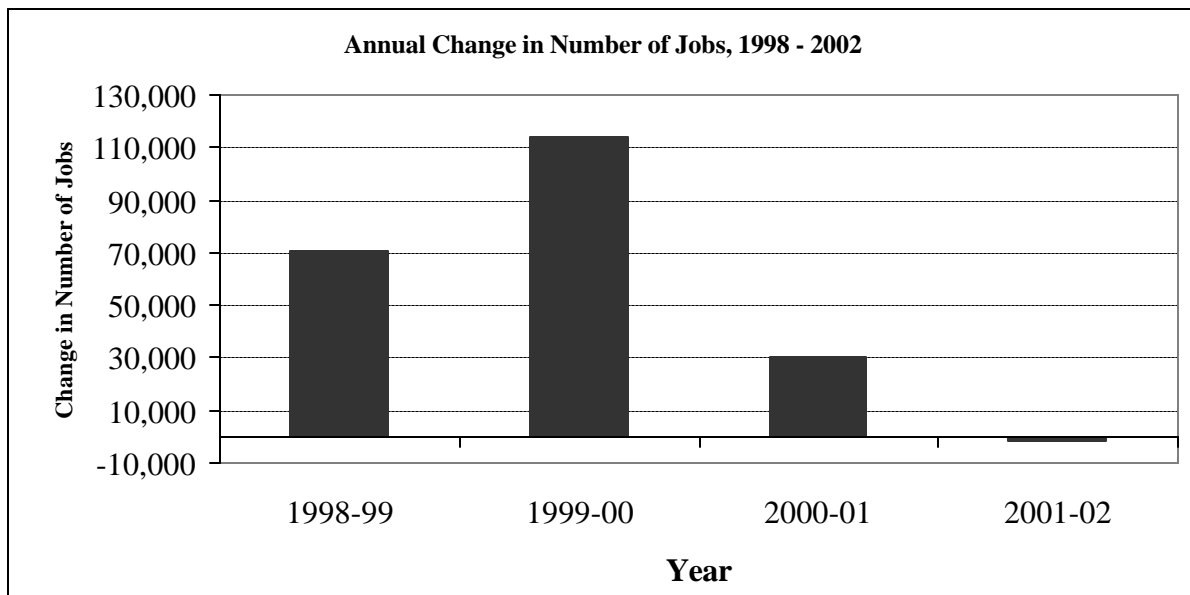
OVERVIEW

EMPLOYMENT¹

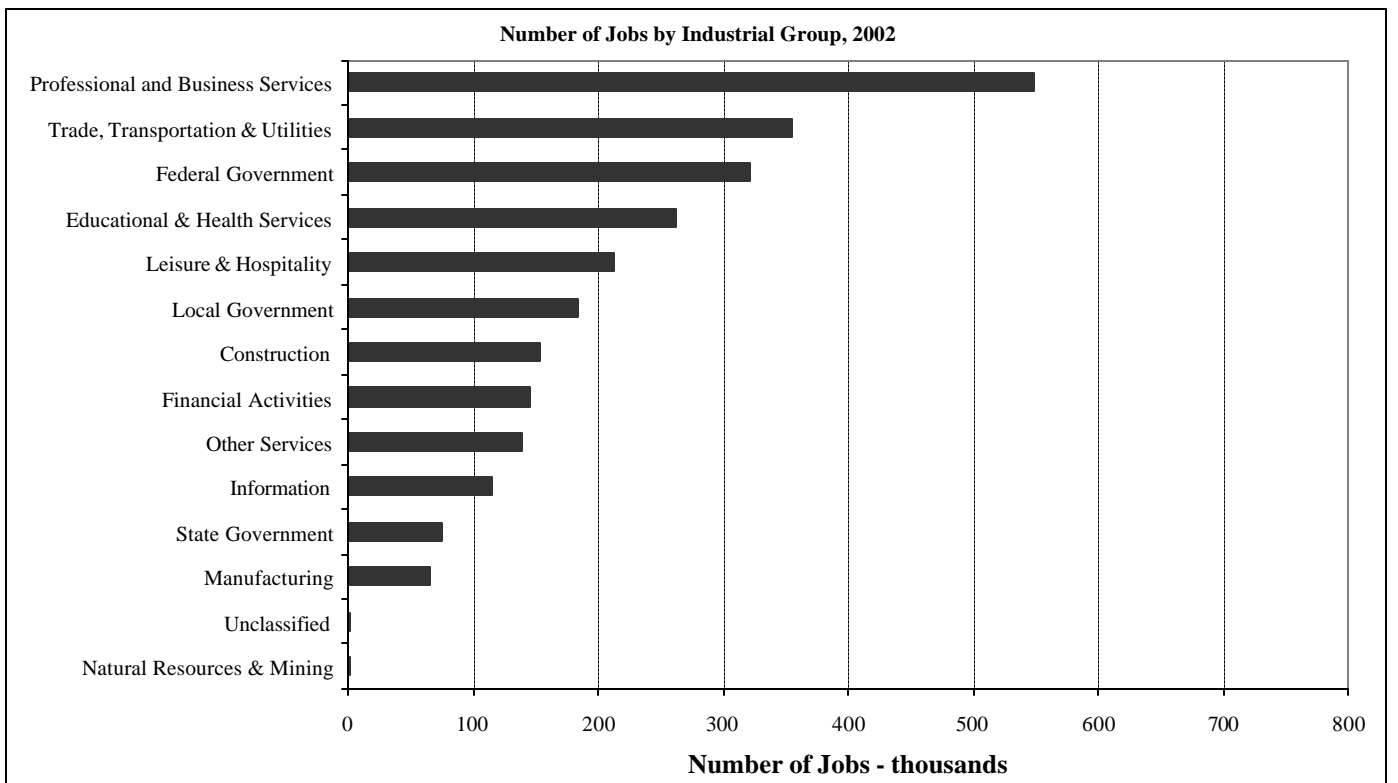
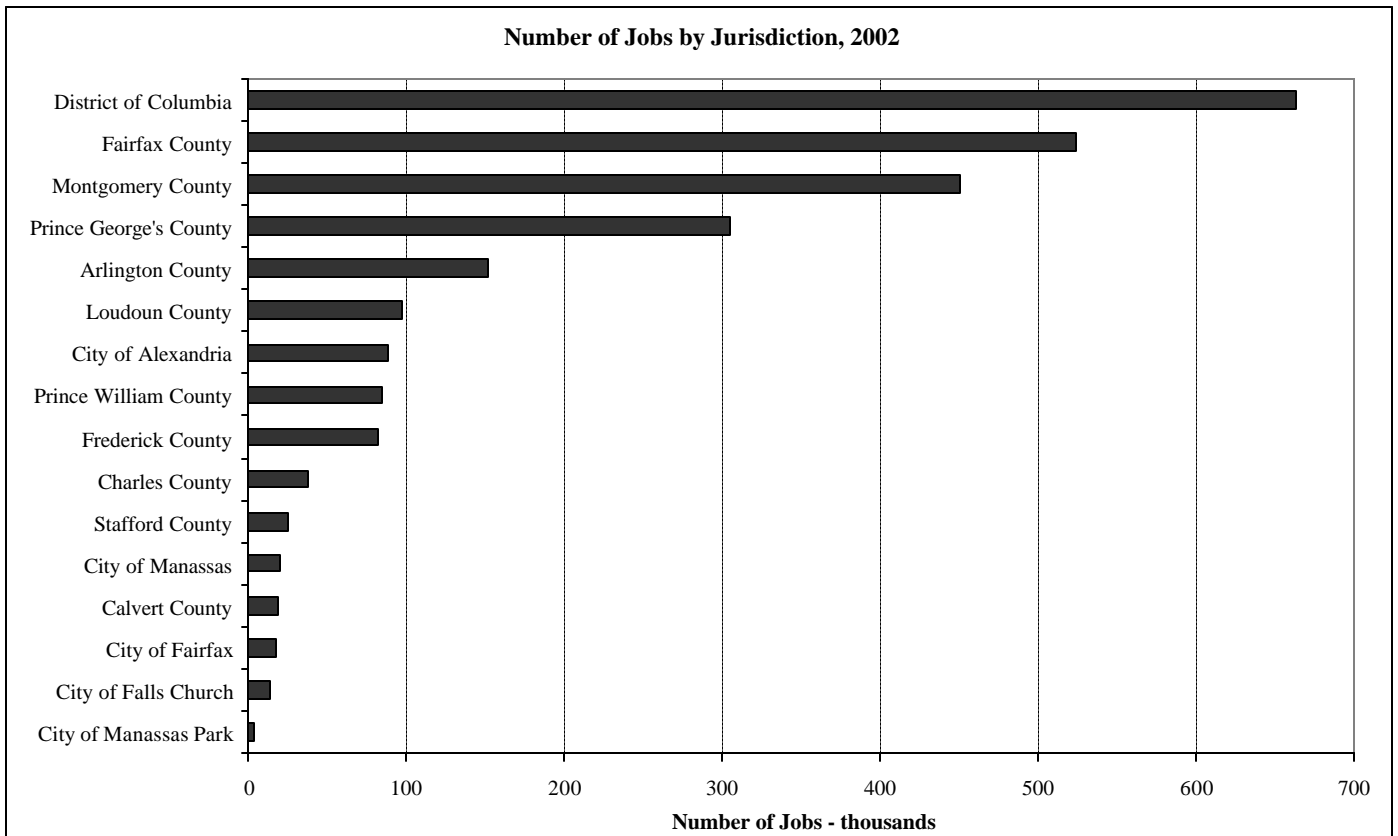
While minor growth in employment took place during the first half of 2002, employment declined during the second half of the year resulting in an overall job decline in 2002 compared to 2001. From 2000 to 2001, the Washington region added 30,258 jobs. Between 2001 and 2002, the region lost 1,989 jobs. As a result, the total number of jobs remained at 2.58 million in 2002.

Between 1998 and 2002, more than 44 percent of the total job growth occurred within the inner suburbs, followed by the outer suburbs with 33 percent and the central jurisdictions with 23 percent. More than 51 percent of the region's jobs, 1.3 million, remain in the inner suburbs.

According to COG's Draft Round 6.3 Cooperative Forecasts, the inner suburbs and central jurisdictions will remain the region's employment center into the next decade. In the year 2030, 31 percent of all jobs will be in the central jurisdictions, around 50 percent in the inner suburbs, and 19 percent in the outer suburbs.



¹ At-Place Employment indicates the number of jobs located within a given area. Therefore, At-Place Employment estimates will differ from Labor Force Employment, which represents the number of area residents working.



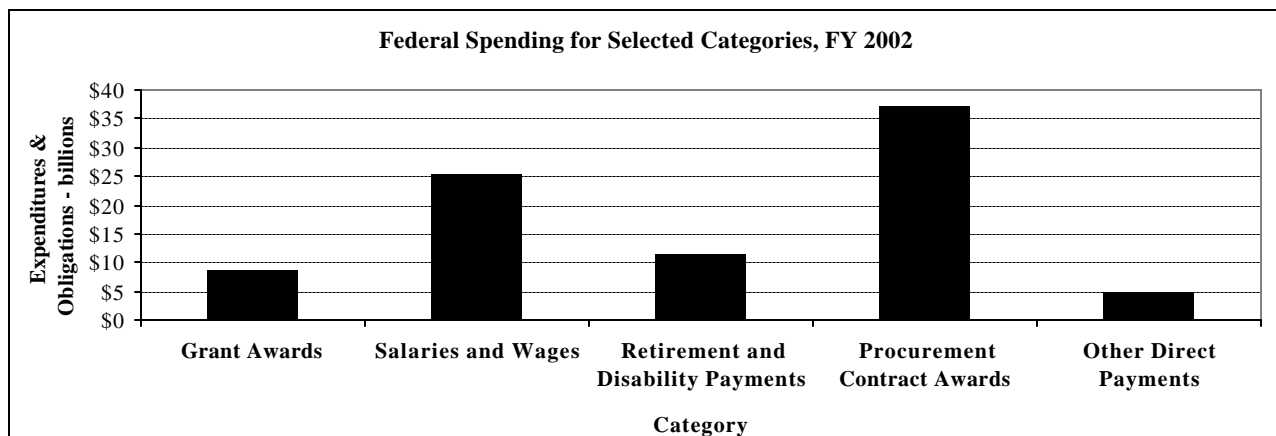
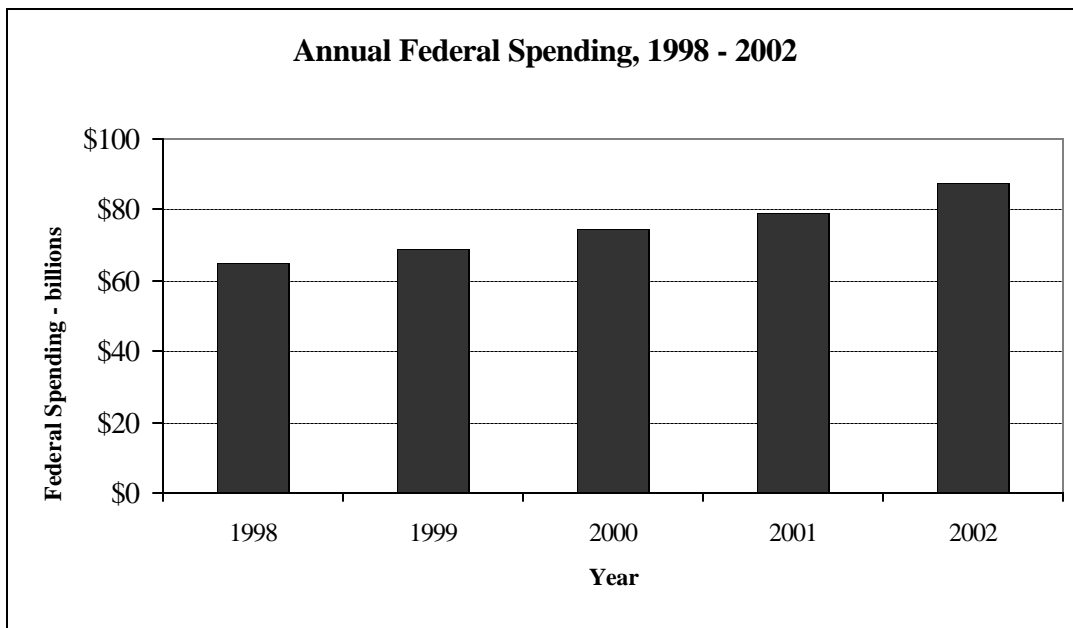
NOTE: 2002 figures for Maryland and Virginia jurisdictions are estimates based on the first three quarters.

OVERVIEW

FEDERAL SPENDING

Federal spending in the Washington region increased to \$87.5 billion in 2002, from \$79.2 billion in 2001. More than 42.7 percent, or \$37.3 billion, came in procurement contract awards that, for the sixth time, exceeded expenditures in the region for salaries and wages. Nearly \$25.3 billion, or more than 28.9 percent of the spending, for salaries and wages. More than 27 percent of the region's federal spending was from the Department of Defense.

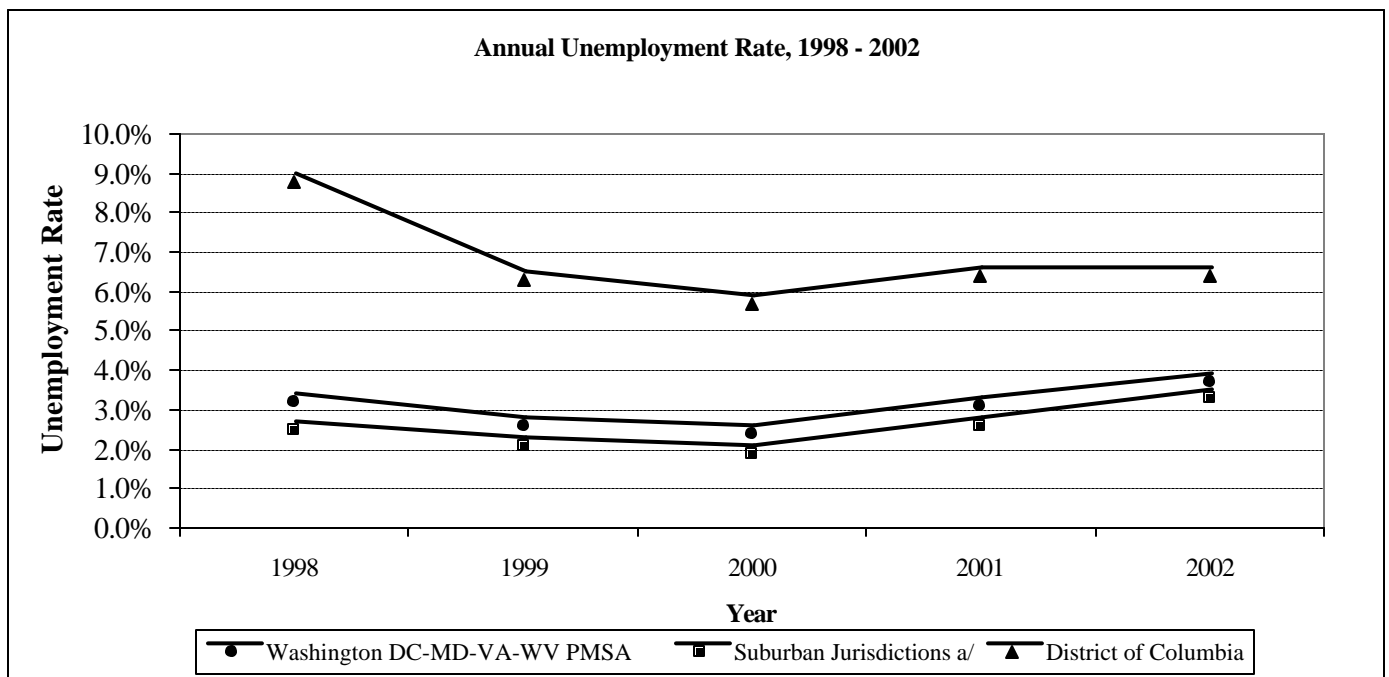
The District of Columbia received more federal spending than either Northern Virginia or suburban Maryland, with less than half of the District total going toward salaries and wages. Northern Virginia received a large percentage of its federal funds from procurement contract awards, while suburban Maryland's total was split among procurement, retirement and disability payments, and salaries and wages.



LABOR FORCE²

Between 1998 and 2002 the civilian labor force in the Washington DC-MD-VA-WV PMSA increased by 264,000 people, to a total of 2,823,000. Of that number, 2,719,800 were employed and 103,200 were unemployed, putting the unemployment rate for the civilian labor force in the Washington DC-MD-VA-WV PMSA at 3.7 percent in 2002. The unemployment rate in the region has increased steadily during the last five years, from 3.2 percent in 1998 to the 2002 figure of 3.7 percent.

Unemployment in the District of Columbia, at 6.4 percent in 2002, remained higher than in suburban jurisdictions, which averaged 3.3 percent.



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

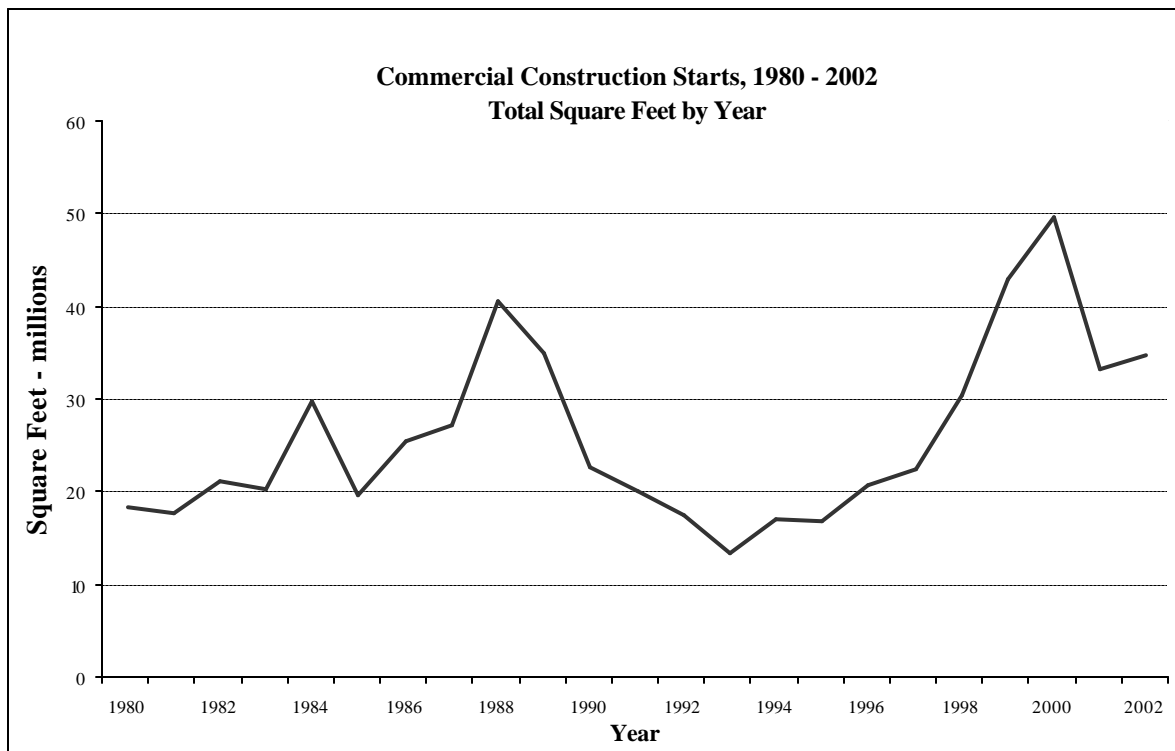
² Labor Force Employment indicates the number of area residents working. Therefore, Labor Force Employment figures will differ from At-Place Employment figures, which represent the number of jobs located within an area.

OVERVIEW

CONSTRUCTION

Commercial construction in the metropolitan Washington region increased slightly during 2002, with developers breaking ground on more than 33.6 million square feet of space. In 2002, commercial construction in the region increased from the 2001 total of 32.2 million, but far below the 2000 total of 48.6 million. Montgomery County saw the most new commercial construction with more than 7.9 million square feet, followed by the District of Columbia with more than 6.5 million square feet.

The number of new, privately, owned housing units authorized in the region increased slightly from 32,775 in 2001 to 34,967 in 2002. Of the permits that were issued in 2002, over half were in the outer suburbs.



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

Mortgage Rates

Mortgage rates continued to fall between 1998 and 2002 to a low of 6.2 percent in 2002 (fourth quarter). Average rates fell from 7.2 percent in 2001 to 6.7 percent in 2002.

Homes Sold

The number of homes sold in the region jumped dramatically between 1998 and 2002, from 63,281 units in 1998 to 93,053 units in 2002. Fairfax County had the most homes sold in 2002 with 22,303.

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 3.8 percent between 2000 and 2001 to 2.4 percent between 2001 and 2002. Nationally, housing inflation increased from 4.0 percent between 2000 and 2001 to 2.2 percent between 2001 and 2002. This measure accounts for price changes in rents and mortgage payments, owner costs, fuels, furnishings, and household supplies.



OVERVIEW

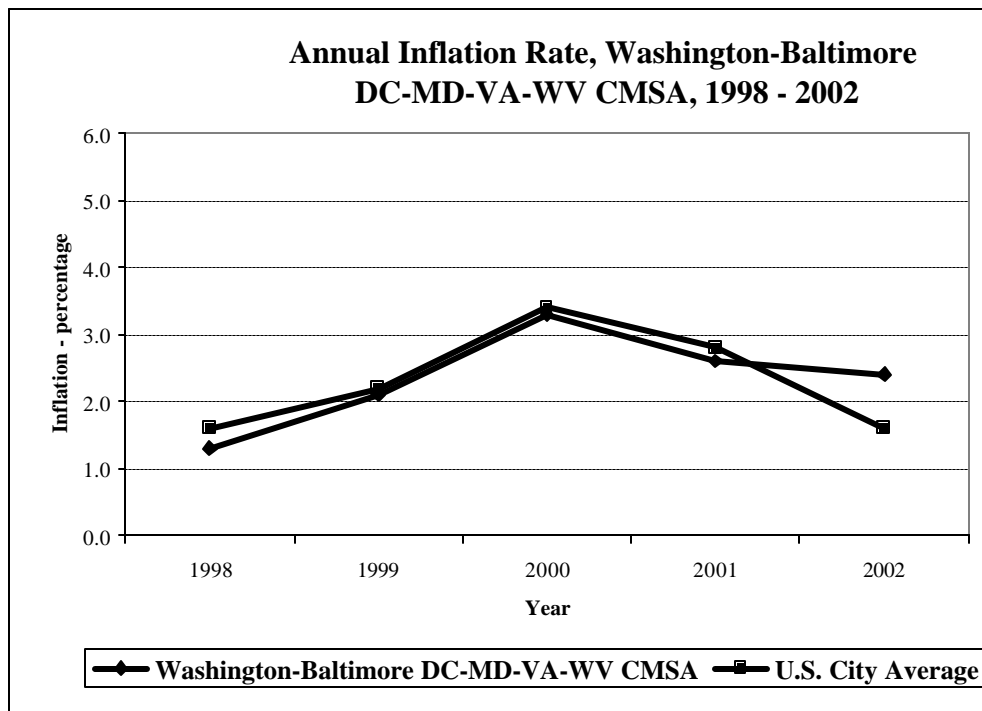
INFLATION

The rate of change in the Consumer Price Index for All Urban Consumers (CPI-U) for the Washington-Baltimore DC-MD-VA-WV CMSA declined from 2.6 percent between 2000 and 2001 to 2.4 percent between 2001 and 2002. Nationally, the rate of change declined from 2.8 percent between 2000 and 2001 to 1.6 percent between 2001 and 2002. The following topical changes were behind the regional inflation rate:

Food and Beverages ¹	2.8 %
Housing ¹	3.8 %
Apparel ¹	-6.3 %
Transportation ¹	-1.9 %
Medical Care ¹	3.5 %
Recreation ²	1.5 %
Education and Communications ²	3.3 %
Other Goods and Services ¹	6.6 %

¹Index is on a November 1996=100 base

²Index is on a December 1997=100 base

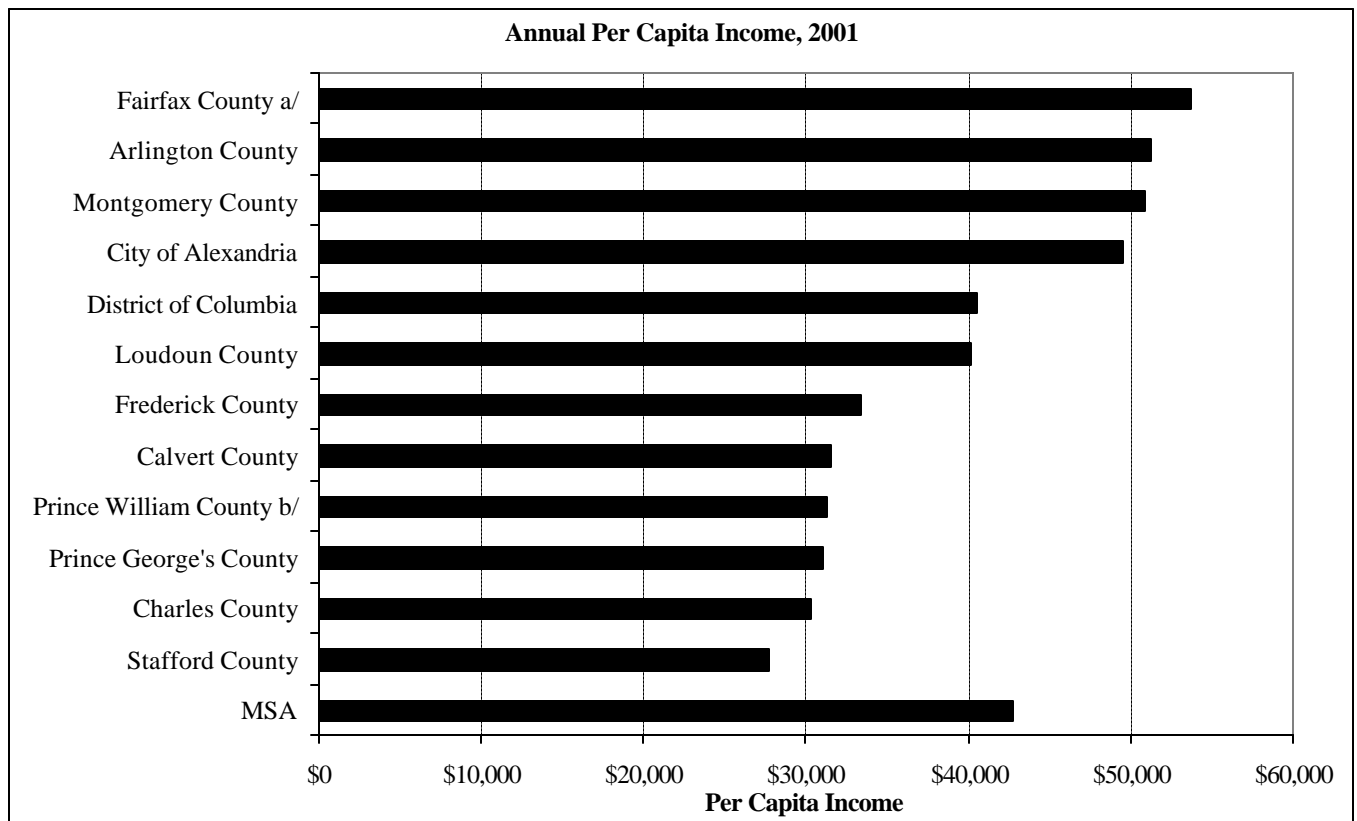


*CPI data for the Washington DC-MD-VA MSA no longer was published separately after December 1997. Beginning in 1998, the metropolitan Washington region became a component of the Washington-Baltimore DC-MD-VA-WV CMSA.

INCOME

Total personal income in the Washington region grew by an average annual rate of 8.4 percent between 1997 and 2001, leading to a 2001 total of \$199.5 billion. Total income growth was fastest in the outer suburbs, where income increased by an average of 10.8 percent per year.

On a per capita basis, income varied greatly by jurisdiction. Fairfax County topped the region in per capita income at \$53,721. Stafford County had the lowest per capita income at \$27,726. The per capita income for the region was \$42,726 in 2001.



Source: U.S. Department of Commerce, Bureau of Economic Analysis, Regional Economic Information System. Data released May 6, 2003.

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

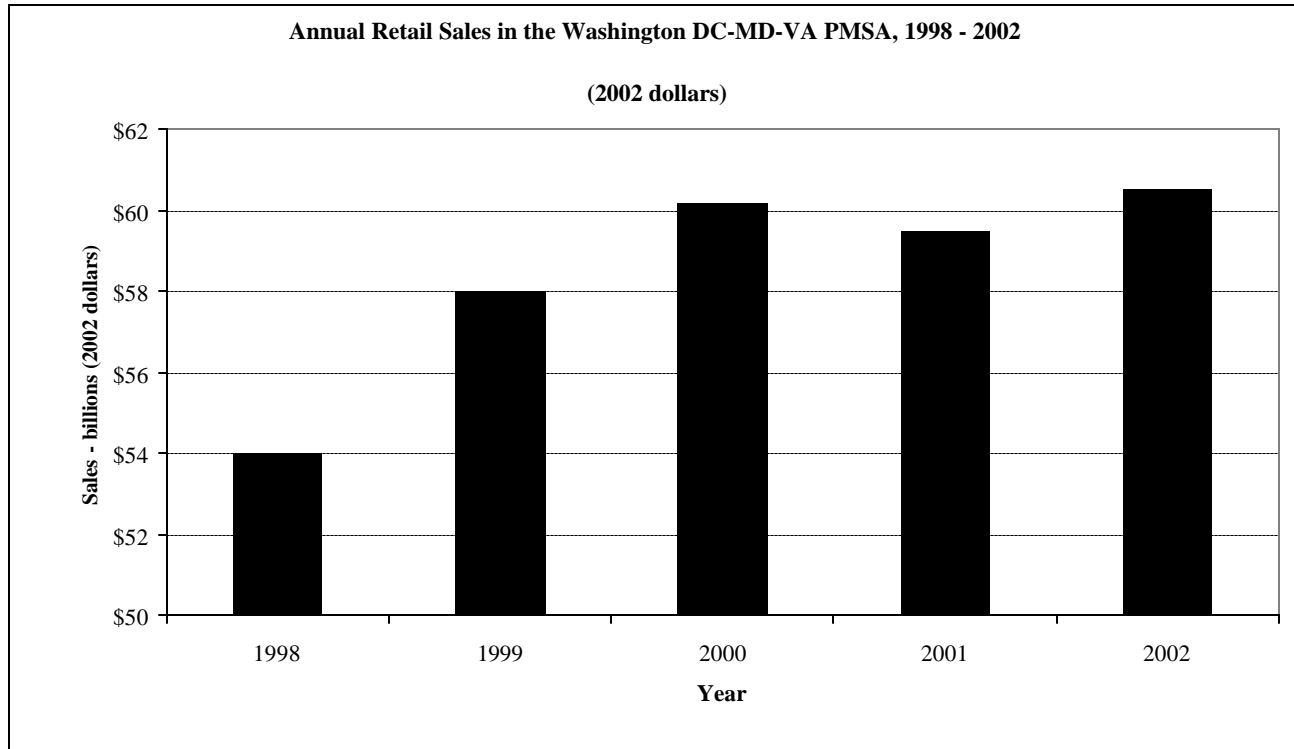
b/ Data for the Cities of Manassas and Manassas Park is included in Prince William County.

OVERVIEW

RETAIL SALES

Retail sales in the region increased both in current and real terms between 1998 and 2002. However, the area's 2002 total of \$60.5 billion, when adjusted for inflation, was greater than total annual retail sales in 2001, \$59.5 billion, and slightly more than the 2000 total of \$60.2 billion.

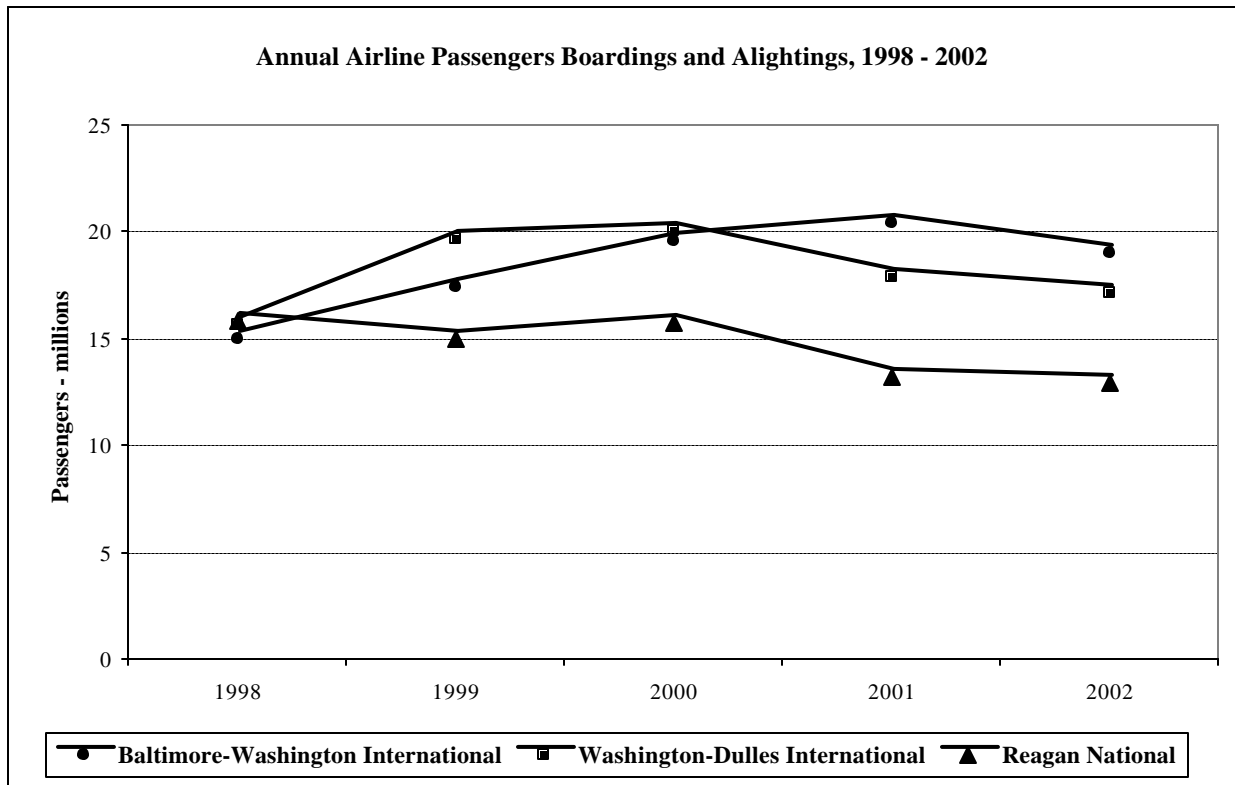
When adjusted for inflation, retail sales in the region increased by 12 percent between 1998 and 2002. Nationally, sales increased by 10.9 percent.



*Published data from the Census Bureau for retail sales for the Washington DC-MD-VA PMSA are no longer available after 1996. Data for 1998 - 2002 are estimated by The Center for Regional Analysis, George Mason University.

AIRLINE PASSENGERS

More than 49 million passengers flew into or out of the Washington region's three major airports in 2002, a 5.4 percent increase from 1998. Baltimore-Washington International led the three airports in total airline passengers served, with 19 million. 17.1 million passengers passed through Washington-Dulles International, while Reagan National served 12.9 million. Reagan National continued to experience the effects of the September 11th attack, with commercial passenger service down by 18 percent since 2000.



POPULATION

Detailed Data by Jurisdiction: Economic Trends in Metropolitan Washington, 1998 - 2002

POPULATION³

The region grew by more than 409,100 people between 1998 and 2002. The majority of this growth in absolute numbers occurred in the region's inner suburbs, which increased by 191,700 people or 7.4 percent. The region's central jurisdictions had a net gain of 66,800 people, or 8.1 percent. The outer suburbs had the greatest percentage increase in the region, 16.3 percent, with the addition of 150,600 people.

Despite the dramatic growth rate in the outer suburbs, the population remains anchored in the inner suburbs, where 59 percent of the region's population lives.

According to COG's Draft Round 6.3 Cooperative Forecasts, the inner suburbs will remain the most populous "ring" of the region well into the next decade. COG forecasts that in the year 2030, the region will hold more than 6.1 million people (34 percent more than the 2000 population). A full 54 percent of the 2030 population is expected to live in the inner suburbs.

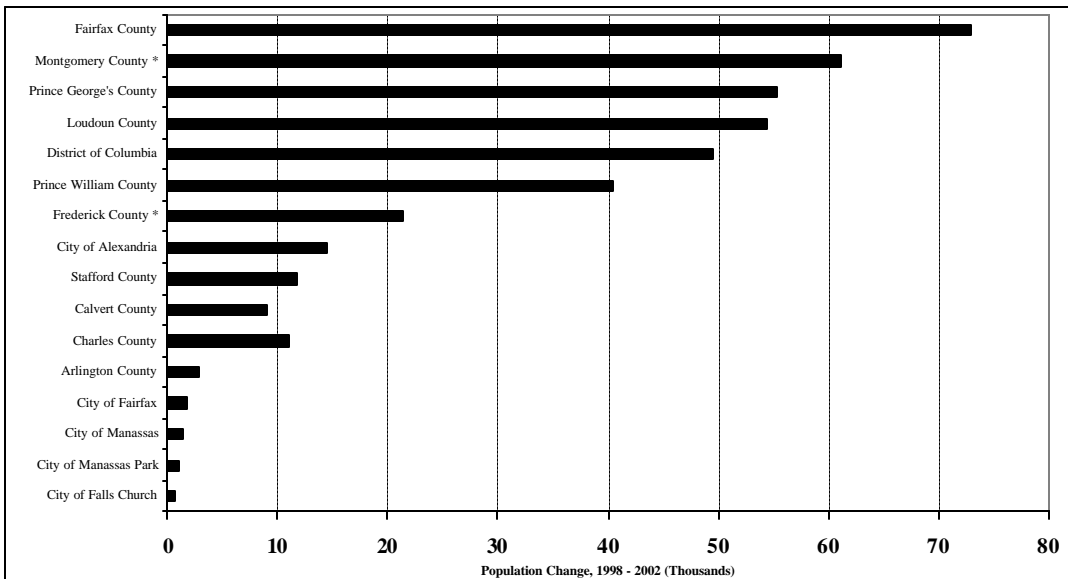
³ Narrative in this section is the same as in the Overview section.

POPULATION

Table 1. Population of the Washington DC-MD-VA MSA, by Jurisdiction, 1998 – 2002

(Thousands of People)

JURISDICTIONS	Year					Change 1998 - 2002	
	1998	1999	2000	2001	2002	Number	Percentage
District of Columbia	521.4	519.0	572.1	571.8	570.9	49.5	9.5%
Calvert County	71.9	74.0	74.6	78.3	80.9	9.0	12.5%
Charles County	118.0	120.9	120.5	125.4	129.0	11.0	9.3%
Frederick County	187.6	192.7	195.3	203.8	209.0	21.4	11.4%
City of Frederick*	49.7	52.8	52.8	53.0	54.9	5.2	10.5%
Montgomery County	849.0	862.0	873.3	895.0	910.2	61.2	7.2%
City of Gaithersburg*	49.5	50.0	52.6	54.0	54.0	4.5	9.1%
City of Rockville*	48.4	48.9	47.4	49.8	51.5	3.1	6.4%
City of Takoma Park*	18.6	18.6	17.3	17.3	17.3	-1.3	-7.0%
Prince George's County	777.8	781.8	801.5	816.8	833.1	55.3	7.1%
City of Bowie*	48.7	49.2	50.3	51.4	52.7	4.0	8.2%
City of College Park*	24.9	24.9	24.7	24.7	26.4	1.5	6.0%
City of Greenbelt*	22.1	22.2	21.5	21.2	21.3	-0.8	-3.6%
Maryland Suburbs	2,004.3	2,031.4	2,065.2	2,119.3	2,162.2	157.9	7.9%
Arlington County	187.1	188.1	189.5	190.4	189.9	2.8	1.5%
City of Alexandria	119.5	121.7	128.3	132.7	134.0	14.5	12.1%
Fairfax County	931.5	946.4	969.7	984.4	1,004.4	72.9	7.8%
City of Fairfax	20.3	20.7	21.5	21.7	22.1	1.8	8.9%
City of Falls Church	10.0	10.2	10.4	10.4	10.5	0.5	5.0%
Loudoun County	141.8	156.4	169.6	184.9	196.3	54.5	38.4%
Prince William County	268.9	277.4	280.8	294.8	309.4	40.5	15.1%
City of Manassas	34.5	35.0	35.1	35.5	35.9	1.4	4.1%
City of Manassas Park	9.8	9.3	10.3	11.0	10.9	1.1	11.2%
Stafford County	91.0	95.7	92.4	98.0	102.7	11.7	12.9%
Virginia Suburbs	1,814.4	1,860.9	1,907.6	1,963.8	2,016.1	201.7	11.1%
MSA Total	4,340.1	4,411.3	4,544.9	4,654.9	4,749.2	409.1	9.4%
Central Jurisdictions	828.0	828.8	889.9	894.9	894.8	66.8	8.1%
Inner Suburbs	2,588.6	2,621.1	2,676.4	2,728.3	2,780.3	191.7	7.4%
Outer Suburbs	923.5	961.4	978.6	1,031.7	1,074.1	150.6	16.3%



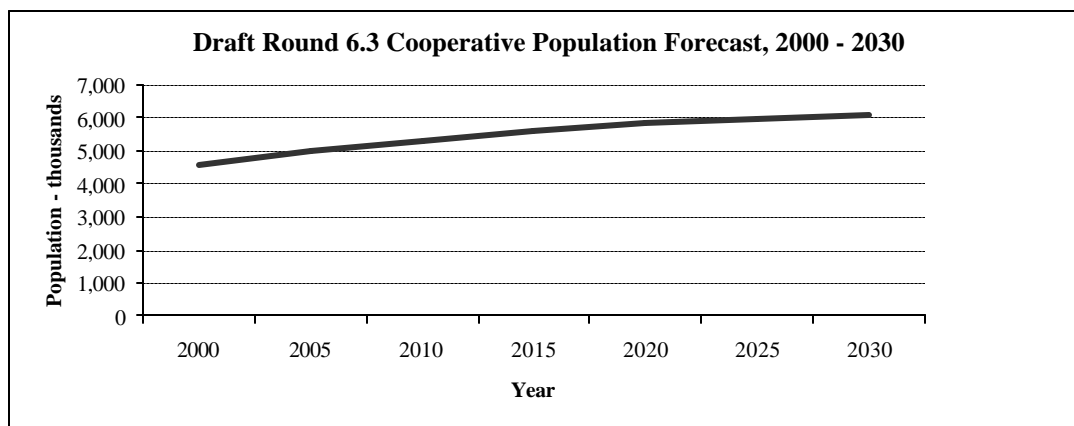
Source: For the year 2000, U.S. Dept. of Commerce, Bureau of the Census, Census 2000. For the years 1998 – 99 and 2001 – 02, either Bureau of Census estimate or jurisdiction estimate. *Persons in Maryland cities are included in appropriate county totals.

POPULATION

Table 2. Summary of Forecast of Population, by Jurisdiction
Draft Round 6.3 Cooperative Forecasts for the Washington DC-MD-VA MSA

(Thousands of People)

JURISDICTIONS	Year							Change 2000 - 2030	
	2000	2005	2010	2015	2020	2025	2030	Number	Percentage
District of Columbia	572.1	607.0	627.0	673.7	688.1	702.4	702.4	130.3	22.8%
Calvert County	74.6	80.6	86.6	91.1	95.6	100.0	104.4	29.8	39.9%
Charles County	120.6	134.0	147.4	165.2	183.0	194.0	205.0	84.4	70.0%
Frederick County	195.3	216.6	238.3	260.0	281.9	299.6	324.6	129.3	66.2%
Montgomery County	873.3	925.0	975.0	1,020.0	1,050.0	1,070.0	1080	206.7	23.7%
City of Rockville a/	47.4	53.7	60.4	62.8	63.3	63.5	64.4	17.0	35.9%
Prince George's County	808.0	856.6	881.1	907.7	932.3	952.1	967.8	159.8	19.8%
Maryland Suburbs	2,071.8	2,212.8	2,328.4	2,444.0	2,542.8	2,615.7	2,681.8	610.0	29.4%
Arlington County	189.5	197.4	202.5	209.1	215.5	219.5	221.9	32.4	17.1%
City of Alexandria	128.3	136.5	142.9	145.9	147.8	150.0	151.7	23.4	18.2%
Fairfax County b/	969.8	1,046.9	1,116.1	1,151.8	1,176.6	1,189.4	1199.4	229.6	23.7%
City of Fairfax	21.4	22.4	23.0	23.3	23.6	23.4	23.2	1.8	8.4%
City of Falls Church	10.4	10.6	11.3	11.6	11.9	12.1	12.2	1.8	17.3%
Loudoun County	169.6	239.3	300.4	351.2	393.7	423.0	441.9	272.3	160.6%
Prince William County	280.8	339.9	376.2	400.6	414.8	425.9	433.1	152.3	54.2%
City of Manassas	35.7	36.7	37.5	37.6	37.7	37.9	38.1	2.4	6.7%
City of Manassas Park	10.3	14.8	15.3	15.5	15.7	15.7	15.8	5.5	53.4%
Stafford County c/	92.5	110.2	127.9	141.3	154.7	167.5	180.4	87.9	95.0%
Virginia Suburbs	1,908.3	2,154.7	2,353.1	2,487.9	2,592.0	2,664.4	2,717.7	809.4	42.4%
MSA Total	4,552.2	4,974.5	5,308.5	5,605.6	5,822.9	5,982.5	6,101.9	1,549.7	34.0%
Central Jurisdictions	889.9	940.9	972.4	1,028.7	1,051.4	1,071.9	1,076.0	186.1	20.9%
Inner Suburbs	2,682.9	2,861.5	3,006.5	3,114.4	3,194.4	3,247.0	3,282.6	599.7	22.4%
Outer Suburbs	979.4	1,172.1	1,329.6	1,462.5	1,577.1	1,663.6	1,743.3	763.9	78.0%



Source: COG Draft Round 6.3 Cooperative Forecast. The Metropolitan Development Policy Committee approved Draft Round 6.3 on March 12, 2003. Draft Round 6.3 will be presented to the COG Board for action at their September 2003 meeting.

a/ Included in Montgomery County total.

b/ Includes Fairfax County group quarters population in the Massey Complex.

c/ Source: Rappahannock Area Development Commission (RADCO), March 2003. The estimates for 2010, 2020, and 2030 are control totals provided by the Virginia Employment Commission (VEC) and should be used only for transportation purposes. Incremental five-year estimates (2005, 2015, and 2025) have been developed by COG for transportation modeling and air quality analysis.

EMPLOYMENT⁴

While there was minor growth in employment that took place during the first half of 2002, employment declined during the second half of the year resulting in an overall job decline in 2002 compared to 2001. From 2000 to 2001, the Washington region added 30,258 jobs. Between 2001 and 2002, the region lost 1,989 jobs. As a result, the total number of jobs remained at 2.58 million in 2002.

Between 1998 and 2002, more than 44 percent of the total job growth occurred within the inner suburbs, followed by the outer suburbs with 33 percent and the central jurisdictions with 23 percent. More than 51 percent of the region's jobs, 1.3 million, remain in the inner suburbs.

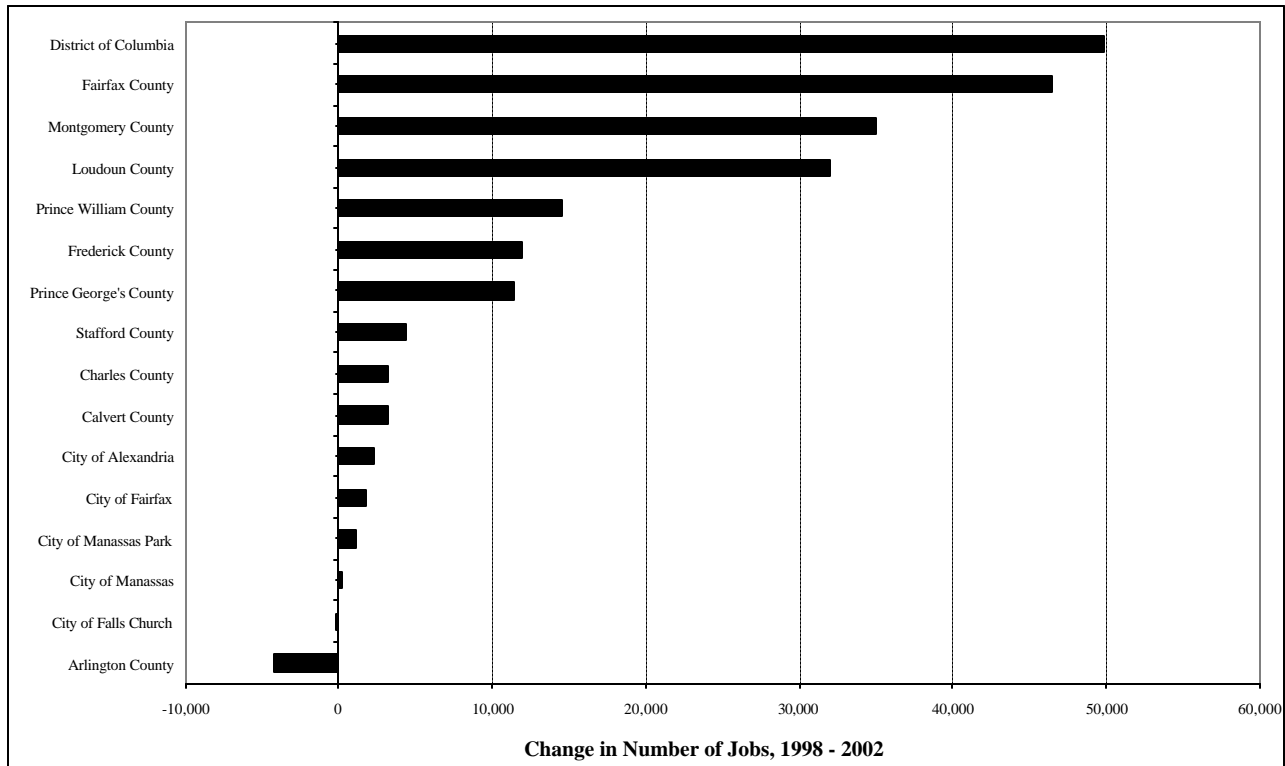
According to COG's Draft Round 6.3 Cooperative Forecasts, the inner suburbs and central jurisdictions will remain the region's employment center into the next decade. In the year 2030, 31 percent of all jobs will be in the central jurisdictions, around 50 percent in the inner suburbs, and 19 percent in the outer suburbs.

⁴ At-Place Employment indicates the number of jobs located within a given area. Therefore, At-Place Employment estimates will differ from Labor Force Employment, which represents the number of area residents working.

EMPLOYMENT

Table 3. At-Place Employment in the Washington DC-MD-VA MSA, by Jurisdiction, 1998 – 2002

JURISDICTIONS	Year					Change 1998 - 2002
	1998	1999	2000	2001	2002*	
District of Columbia	613,200	627,200	650,200	650,700	663,100	49,900
Calvert County	15,798	16,473	16,909	18,026	18,965	3,167
Charles County	34,169	34,998	36,155	36,987	37,369	3,200
Frederick County	69,867	73,052	77,120	79,463	81,828	11,961
Montgomery County	415,226	426,066	447,744	449,853	450,197	34,971
Prince George's County	293,957	298,162	303,060	305,176	305,318	11,361
Maryland Suburbs	829,017	848,751	880,988	889,505	893,677	64,660
Arlington County	155,560	151,809	157,699	159,175	151,376	-4,184
City of Alexandria	85,780	86,922	91,242	91,330	88,065	2,285
Fairfax County	476,996	500,059	532,606	537,726	523,431	46,435
City of Fairfax	16,193	16,217	16,595	16,988	17,913	1,720
City of Falls Church	14,223	14,174	14,409	14,137	14,096	-127
Loudoun County	64,751	75,396	85,187	94,544	96,739	31,988
Prince William County	70,047	73,266	76,577	81,518	84,521	14,474
City of Manassas	19,881	19,872	19,829	19,382	20,095	214
City of Manassas Park	2,624	3,356	3,761	3,663	3,721	1,097
Stafford County	20,178	22,083	23,984	24,667	24,612	4,434
Virginia Suburbs	926,233	963,154	1,021,889	1,043,130	1,024,569	98,336
MSA Total	2,368,450	2,439,105	2,553,077	2,583,335	2,581,346	212,896
Central Jurisdictions	854,540	865,931	899,141	901,205	902,541	48,001
Inner Suburbs	1,216,595	1,254,678	1,314,414	1,323,880	1,310,955	94,360
Outer Suburbs	297,315	318,496	339,522	358,250	367,850	70,535



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; and Virginia Employment Commission, Economic Information Services Division.

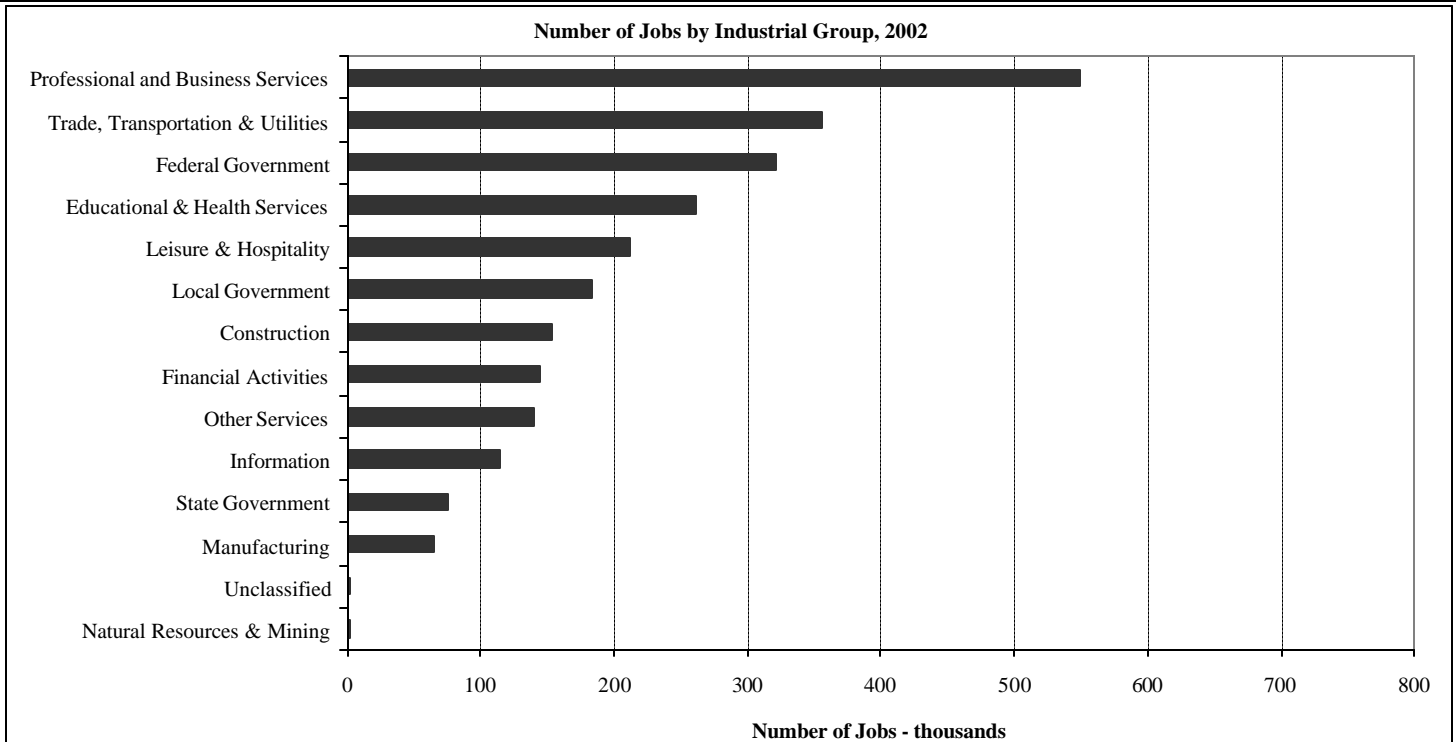
Figures do not include estimates of military personnel, selfemployed, and other workers. Figures may not sum to total due to rounding.

*2002 Figures for Maryland and Virginia jurisdictions are estimates based on the first three quarters.

EMPLOYMENT

Table 4. At-Place Employment in the Washington DC-MD-VA MSA, by Industrial Group, 1998 - 2002

SIC - INDUSTRIAL GROUP	Year					NAICS - INDUSTRIAL GROUP
	1998	1999	2000	2001*	2002*	
Manufacturing	87,096	81,898	85,336	-	65,521	Natural Resources & Mining
Construction	122,496	128,790	141,573	-	153,589	Manufacturing
T.C.U. a/	109,576	119,089	126,267	-	355,634	Construction
Wholesale Trade	74,049	75,773	78,617	-	114,892	Trade, Transportation & Utilities
Retail Trade	363,653	366,532	378,194	-	145,168	Information
F.I.R.E. b/	133,715	138,689	141,923	-	549,145	Financial Activities
Services	920,020	966,587	1,026,670	-	261,520	Professional and Business Services
				-	212,515	Educational & Health Services
				-	139,600	Leisure & Hospitality
Federal Government	324,717	322,908	324,550	-	321,382	Other Services
Local Government	160,157	166,172	171,251	-	183,963	Federal Government
State Government	63,077	62,080	64,861	-	75,209	Local Government
Other/Unclassifiable ¹	9,894	10,587	13,835	-	1,774	State Government
						Unclassified
Total	2,368,450	2,439,105	2,553,077	2,583,335	2,581,346	



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; and Virginia Employment Commission, Economic Information Services Division. Figures do not include estimates of military personnel, selfemployed, and other workers. Figures may not sum to total due to rounding.

* The Bureau of Labor Statistics has replaced the Standard Industrial Classification (SIC) system with the North American Industry Classification System (NAICS). For CY 2001, the District of Columbia and the Commonwealth of Virginia reported employment by the SIC system and the State of Maryland reported employment by the NAICS system. For this reason, comparing employment by Industrial Group between the two classifications is not possible. For CY 2002, the District of Columbia, Commonwealth of Virginia, and the State of Maryland reported employment by the NAICS system. Future editions of this report will state employment prior to 2002 under the NAICS system as the data become available.

a/ T.C.U. stands for Transportation, Communications, and Public Utilities.

b/ F.I.R.E. stands for Finance, Insurance, and Real Estate.

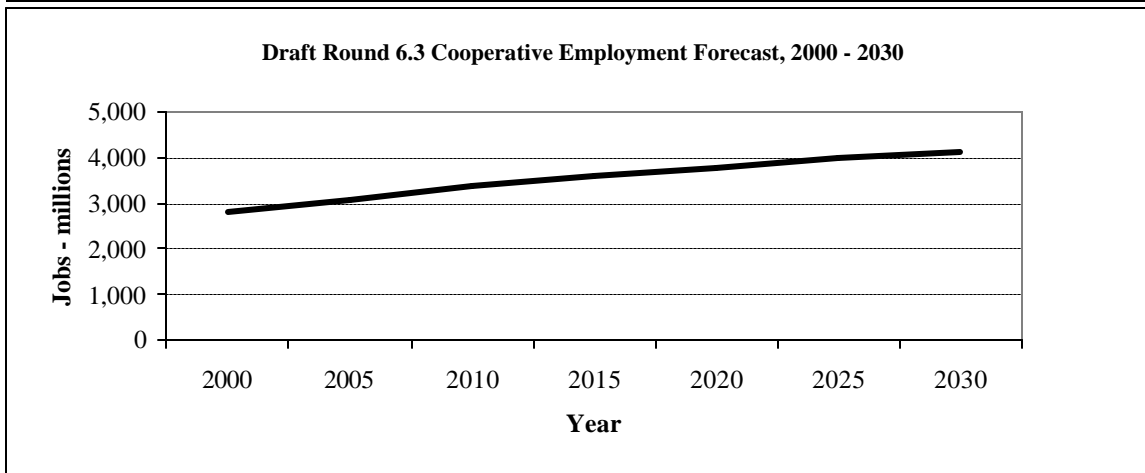
¹ (Other – Maryland’s miscellaneous employment) and (Unclassifiable – Virginia’s miscellaneous employment)

EMPLOYMENT

**Table 5. Summary of Forecast of Employment, by Jurisdiction
Draft Round 6.3 Cooperative Forecast for the Washington DC-MD-VA MSA**

(Thousands of Jobs)

JURISDICTIONS	Year							Change 2000 - 2030	
	2000	2005	2010	2015	2020	2025	2030	Number	Percentage
District of Columbia	678.0	720.4	752.0	783.7	807.1	831.2	831.2	153.2	22.6%
Calvert County a/	25.9	29.4	32.9	33.7	34.5	35.1	35.6	9.7	37.5%
Charles County	50.1	56.5	62.9	64.8	66.8	67.9	69.1	19.0	37.9%
Frederick County	99.7	109.2	120.7	134.6	148.5	162.5	177.8	78.1	78.3%
Montgomery County b/	545.0	585.0	630.0	660.0	680.0	695.0	705.0	160.0	29.4%
City of Rockville c/	68.7	80.6	92.8	98.3	101.3	102.4	103.5	34.8	50.7%
Prince George's County	327.5	357.9	399.9	426.4	465.0	516.8	550.0	222.5	67.9%
Maryland Suburbs	1,048.2	1,138.0	1,246.4	1,319.5	1,394.8	1,477.3	1,537.5	489.3	46.7%
Arlington County	201.7	209.7	236.0	255.0	274.1	293.2	301.9	100.2	49.7%
City of Alexandria	98.6	104.1	120.7	128.3	137.0	141.9	148.1	49.5	50.2%
Fairfax County	532.8	595.0	653.2	678.4	708.5	736.5	758.9	226.1	42.4%
City of Fairfax d/	30.8	32.7	34.8	34.8	34.8	34.8	34.8	4.0	13.0%
City of Falls Church	9.4	9.5	10.0	10.3	10.5	10.6	10.7	1.3	13.8%
Loudoun County	87.0	109.9	137.1	166.2	195.3	224.0	253.6	166.6	191.5%
Prince William County	91.6	106.3	124.0	139.4	152.8	164.4	173.5	81.9	89.4%
City of Manassas	19.9	20.7	21.4	21.7	21.9	21.9	21.9	2.0	10.1%
City of Manassas Park	2.7	3.0	4.7	4.9	5.1	5.2	5.2	2.5	92.6%
Stafford County e/	23.1	29.0	34.9	39.9	44.8	49.6	54.4	31.3	135.5%
Virginia Suburbs	1,097.6	1,219.9	1,376.8	1,478.9	1,584.8	1,682.1	1,763.0	665.4	60.6%
MSA Total	2,823.8	3,078.3	3,375.2	3,582.1	3,786.7	3,990.6	4,131.7	1,307.9	46.3%
Central Jurisdictions	978.3	1,034.2	1,108.7	1,167.0	1,218.2	1,266.3	1,281.2	302.9	31.0%
Inner Suburbs	1,445.5	1,580.1	1,727.9	1,809.9	1,898.8	1,993.7	2,059.4	613.9	42.5%
Outer Suburbs	400.0	464.0	538.6	605.2	669.7	730.6	791.1	391.1	97.8%



Source: COG Draft Round 6.3 Cooperative Forecasts. The Metropolitan Development Policy Committee approved Draft Round 6.3 on March 12, 2003. Draft Round 6.3 will be presented to the COG Board for action at their September 2003 meeting.

Includes forecast of military, selfemployed, mining, and other jobs.

a/ Tri-County Council for Southern Maryland develops 10-year incremental population, housing unit, and employment forecasts for Calvert County, Charles County, and St. Mary's County.

b/ Forecasts for years 2000 to 2030 include all of Takoma Park.

c/ Included in Montgomery County total.

d/ Totals for all years include Fairfax County government employees working in the Massey Complex.

e/ Source: Rappahannock Area Development Commission (RADCO), March 2003.

FEDERAL SPENDING

Federal spending in the Washington region increased to \$87.5 billion in 2002, from \$79.2 billion in 2001. More than 42.7 percent, or \$37.3 billion, came in procurement contract awards which, for the sixth time, exceeded expenditures in the region for salaries and wages. Nearly \$25.3 billion, or more than 28.9 percent of the spending, for salaries and wages. More than 27 percent of the region's federal spending came from the Department of Defense.

The District of Columbia received more federal spending than either Northern Virginia or suburban Maryland, with less than half of the District total going toward salaries and wages. Northern Virginia received a large percentage of its federal funds from procurement contract awards, while suburban Maryland's total was split among procurement, retirement and disability payments, and salaries and wages.

FEDERAL SPENDING

**Table 6. Direct Federal Expenditures and Obligations
in the Washington DC-MD-VA MSA by Jurisdiction, FY 2002**

(Thousands of Dollars)

JURISDICTIONS	Grant Awards	Salaries and Wages	Retirement and Disability Payments	Procurement Contract Awards	Other Direct Payments	Total	2002 Total	
							Department of Defense	Non-Defense
District of Columbia	\$4,832,314	\$13,820,584	\$1,876,039	\$10,874,704	\$2,129,539	\$33,533,180	\$3,453,520	\$30,079,660
Calvert County	14,536	12,943	183,711	6,201	45,318	\$262,709	31,373	231,336
Charles County	38,680	151,350	321,288	40,625	78,157	\$630,100	200,695	429,405
Frederick County	76,850	211,071	403,092	394,369	122,981	\$1,208,363	453,778	754,585
Montgomery County	834,742	3,344,378	2,076,037	5,001,343	643,016	\$11,899,516	1,955,047	9,944,469
Prince George's County	1,417,105	2,047,089	1,963,319	2,913,897	574,583	\$8,915,993	1,654,604	7,261,389
Maryland Suburbs	\$2,381,913	\$5,766,831	\$4,947,447	\$8,356,435	\$1,464,055	\$22,916,681	\$4,295,497	\$18,621,184
Arlington County	333,022	2,819,083	478,862	3,807,073	144,279	\$7,582,319	3,973,262	3,609,057
City of Alexandria	245,831	595,532	578,522	1,448,825	140,977	\$3,009,687	1,592,805	1,416,882
Fairfax County	444,190	1,116,041	2,094,471	7,961,338	519,516	\$12,135,556	6,036,786	6,098,770
City of Fairfax	93,054	63,817	300,867	2,324,946	51,359	\$2,834,043	1,273,213	1,560,830
City of Falls Church	123,381	272,560	86,112	639,027	40,241	\$1,161,321	632,188	529,133
Loudoun County	39,861	280,433	287,084	972,290	48,769	\$1,628,437	897,350	731,087
Prince William County	128,190	485,851	555,535	396,810	63,130	\$1,629,516	945,950	683,566
City of Manassas	21,218	39,860	130,007	515,671	33,371	\$740,127	465,884	274,243
City of Manassas Park	9,768	2,016	2,825	997	343	\$15,949	1,396	14,553
Stafford County	16,326	47,815	193,587	22,016	24,140	\$303,884	85,425	218,459
Virginia Suburbs	\$1,454,841	\$5,723,008	\$4,707,872	\$18,088,993	\$1,066,125	\$31,040,839	\$15,904,259	\$15,136,580
MSA Total	\$8,669,068	\$25,310,423	\$11,531,358	\$37,320,132	\$4,659,719	\$87,490,700	\$23,653,276	\$63,837,424
Percentage of Total	9.9%	28.9%	13.2%	42.7%	5.3%	100.0%	27.0%	73.0%
Central Jurisdictions	5,411,167	17,235,199	2,933,423	16,130,602	2,414,795	44,125,186	9,019,587	35,105,599
Inner Suburbs	2,912,472	6,843,885	6,520,806	18,840,551	1,828,715	36,946,429	11,551,838	25,394,591
Outer Suburbs	345,429	1,231,339	2,077,129	2,348,979	416,209	6,419,085	3,081,851	3,337,234

Federal Spending for Selected Categories, FY 2002



Source: U.S. Dept. of Commerce, Economics and Statistics Administration, Bureau of the Census, Consolidated Federal Funds Report, FY 2002.

NOTE: Grant locations represent location of initial recipient. Salary and wage location 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.

LABOR FORCE⁵

Between 1998 and 2002 the civilian labor force in the Washington DC-MD-VA-WV PMSA increased by 264,000 people, to a total of 2,823,000. Of that number, 2,719,800 were employed and 103,200 were unemployed, putting the unemployment rate for the civilian labor force in the Washington DC-MD-VA-WV PMSA at 3.7 percent in 2002. The unemployment rate in the region has increased steadily during the last five years, from 3.2 percent in 1998 to the 2002 figure of 3.7 percent.

Unemployment in the District of Columbia, at 6.4 percent in 2002, remained higher than in suburban jurisdictions, which averaged 3.3 percent.

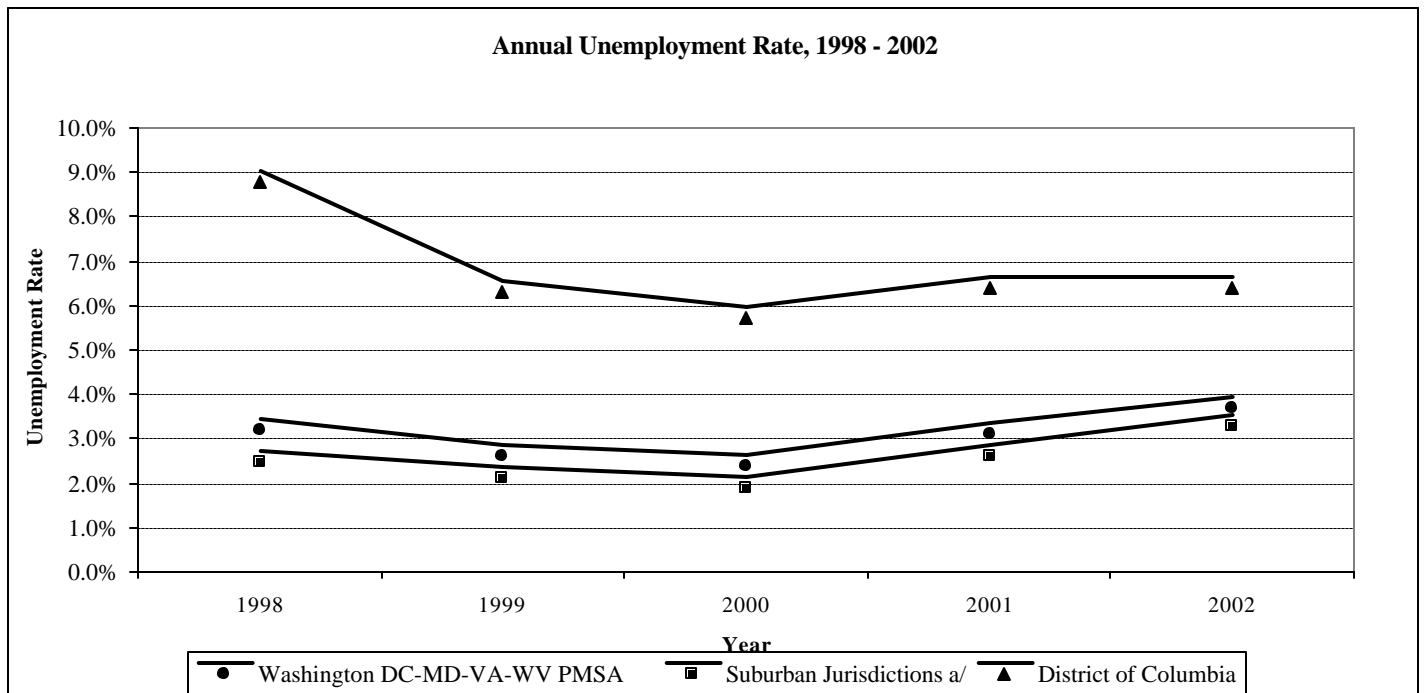
⁵ Labor Force Employment indicates the number of area residents working. Therefore, Labor Force Employment figures will differ from At-Place Employment figures, which represent the number of jobs located within an area.

LABOR FORCE

Table 7. Labor Force Data, by Place of Residence in the Washington, DC-MD-VA-WV PMSA, 1998 – 2002

(Thousands)

Jurisdictional Group	Structure Type	Year					Change 1998 - 2002	
		1998	1999	2000	2001	2002	Number	Percentage
Washington DC-MD-VA-WV PMSA	Civilian Labor Force	2,559.0	2,623.1	2,698.5	2,782.2	2,823.0	264.0	10.3%
	Employment	2,477.3	2,555.3	2,634.3	2,696.8	2,719.8	242.5	9.8%
	Unemployment	81.6	67.8	64.2	85.5	103.2	21.6	26.5%
	Unemployment Rate b/	3.2%	2.6%	2.4%	3.1%	3.7%		
Suburban Jurisdictions a/	Civilian Labor Force	2,291.0	2,342.3	2,388.1	2,469.6	2,518.9	227.9	9.9%
	Employment	2,233.1	2,292.2	2,341.6	2,404.2	2,435.2	202.1	9.1%
	Unemployment	57.9	50.2	46.5	65.4	83.7	25.8	44.6%
	Unemployment Rate b/	2.5%	2.1%	1.9%	2.6%	3.3%		
District of Columbia	Civilian Labor Force	268.0	280.8	310.4	312.6	304.1	36.1	13.5%
	Employment	244.9	263.2	292.7	292.5	284.6	39.7	16.2%
	Unemployment	23.7	17.6	17.7	20.1	19.5	-4.2	-17.7%
	Unemployment Rate b/	8.8%	6.3%	5.7%	6.4%	6.4%		



Source: District of Columbia Department of Employment Services, Labor Market Information Staff.

Figures may not sum to total due to rounding.

a/ Includes all jurisdictions within the Washington DC-MD-VA-WV PMSA except the District of Columbia

b/ Seasonally unadjusted

CONSTRUCTION

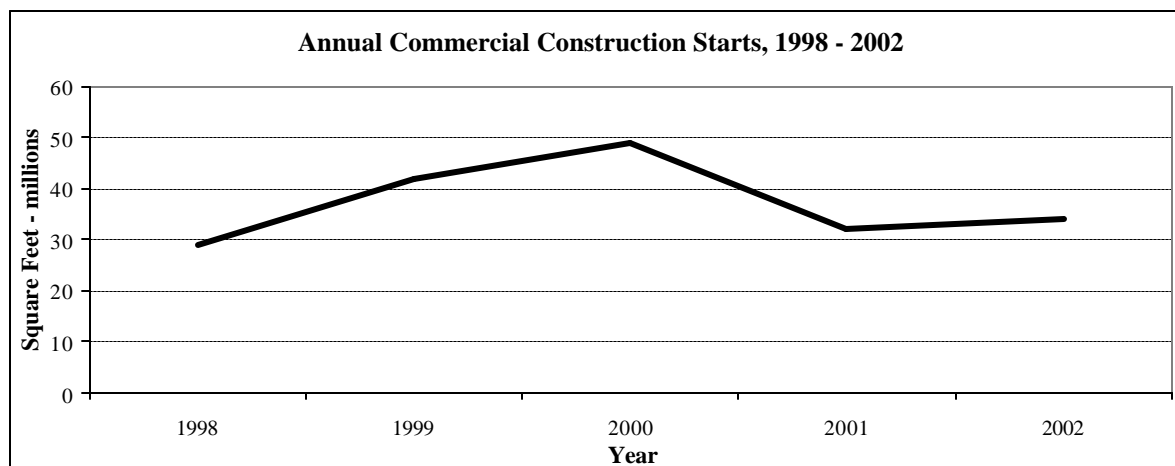
Commercial construction in the metropolitan Washington region increased slightly during 2002, with developers breaking ground on more than 33.6 million square feet of space. In 2002, commercial construction in the region increased from the 2001 total of 32.2 million, but far below the 2000 total of 48.6 million. Montgomery County saw the most new commercial construction with more than 7.9 million square feet, followed by the District of Columbia with more than 6.5 million square feet.

The number of new, privately, owned housing units authorized in the region increased slightly from 32,775 in 2001 to 34,967 in 2002. Of the permits that were issued in 2002, nearly half were in the outer suburbs.

CONSTRUCTION

Table 8. Total Square Feet of Commercial Construction Started by Jurisdiction, 1998 – 2002

JURISDICTIONS	Year					Total 1998 - 2002
	1998	1999	2000	2001	2002	
District of Columbia	4,270,489	7,327,373	7,106,863	4,737,705	6,518,860	29,961,290
Calvert County	a/	a/	a/	a/	a/	a/
Charles County	632,100	491,065	635,595	144,270	249,777	2,152,807
Frederick County	1,493,029	1,302,340	2,080,722	1,590,022	948,061	7,414,174
City of Frederick*	1,357,354	697,450	603,283	736,714	502,680	3,897,481
Montgomery County	4,282,856	7,940,943	7,717,025	6,527,438	7,908,651	34,376,913
City of Gaithersburg*	723,323	790,616	253,436	641,465	739,423	3,148,263
City of Rockville*	636,997	846,688	1,966,835	2,033,414	812,857	6,296,791
City of Takoma Park*	0	0	0	0	98,038	98,038
Prince George's County	2,651,753	3,027,744	3,615,921	4,013,984	2,125,407	15,434,809
City of Bowie*	262,819	444,206	617,043	219,184	102,807	1,646,059
City of College Park*	66,758	963,506	933,844	686,134	0	2,650,242
City of Greenbelt*	0	180,000	133,000	86,340	0	399,340
Maryland Suburbs	9,059,738	12,762,092	14,049,263	12,275,714	11,231,896	59,378,703
Arlington County	767,806	1,674,327	1,614,190	867,266	2,248,000	7,171,589
City of Alexandria	769,717	1,161,550	1,016,030	697,231	4,312,836	7,957,364
Fairfax County	6,710,346	11,047,667	10,813,067	7,611,227	4,472,477	40,654,784
City of Fairfax	106,758	136,000	39,000	106,267	63,486	451,511
City of Falls Church	14,600	0	55,468	14,570	15,500	100,138
Loudoun County	5,234,257	6,182,705	11,229,627	4,558,831	2,490,593	29,696,013
Prince William County b/	2,390,652	1,496,397	2,711,814	1,322,491	2,286,088	7,921,354
Stafford County	a/	a/	a/	a/	a/	a/
Virginia Suburbs	15,994,136	21,698,646	27,479,196	15,177,883	15,888,980	96,238,841
Region Total	29,324,363	41,788,111	48,635,322	32,191,302	33,639,736	185,578,834
Central Jurisdictions	5,808,012	10,163,250	9,737,083	6,302,202	13,079,696	45,090,243
Inner Suburbs	13,766,313	22,152,354	22,240,481	18,273,486	14,585,521	91,018,155
Outer Suburbs	9,750,038	9,472,507	16,657,758	7,615,614	5,974,519	49,470,436



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

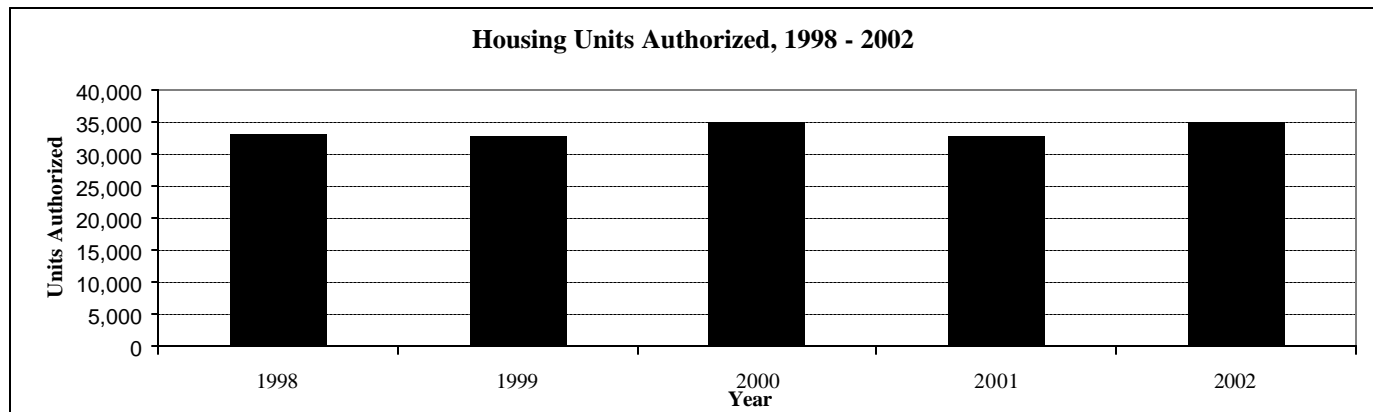
a/ The Commercial Construction Inventory does not include data for Calvert or Stafford County

b/ Includes the Cities of Manassas and Manassas Park

Source: COG Commercial Construction Indicators 2002 Annual Summary, July 2002.

Table 9. New Privately Owned Housing Units Authorized in the Washington DC-MD-VA MSA, by Jurisdiction 1998 – 2002

JURISDICTIONS	1998		1999		2000		2001		2002	
	Total	Single Family	Total	Single Family	Total	Single Family	Total	Single Family	Total	Single Family
District of Columbia	429	n/a	683	n/a	806	187	896	131	1,591	383
Calvert County	845	n/a	983	n/a	931	906	886	886	928	855
Charles County	1,517	n/a	1,211	n/a	1,233	1,143	1,368	1,368	1,470	1,404
Frederick County	1,903	n/a	2,667	n/a	2,747	2,695	1,983	1,721	1,578	1,352
City of Frederick*	584	n/a	1,032	n/a	802	786	542	530	14	14
Montgomery County	5,315	n/a	3,801	n/a	4,950	2,931	5,249	3,191	5,013	2,909
City of Gaithersburg*	825	n/a	577	n/a	568	336	572	375	523	414
City of Rockville*	655	n/a	452	n/a	592	252	1,131	491	1,127	496
City of Takoma Park*	0	n/a	0	n/a	0	n/a	0	n/a	0	n/a
Prince George's County	4,376	n/a	2,615	n/a	3,456	3,179	3,049	3,049	2,563	2,485
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
Maryland Suburbs	13,956	n/a	11,277	n/a	13,317	10,854	12,535	10,215	11,552	9,005
Arlington County	459	n/a	970	n/a	811	59	920	171	17	17
City of Alexandria	1,300	n/a	1,090	n/a	1,100	386	1,329	401	1,244	380
Fairfax County	7,144	n/a	7,494	n/a	5,816	3,818	6,121	3,498	5,979	2,982
City of Fairfax	58	n/a	79	n/a	166	166	191	95	27	27
City of Falls Church	2	n/a	2	n/a	1	1	2	2	2	2
Loudoun County	5,433	n/a	6,071	n/a	6,300	5,131	4,753	3,436	6,108	4,659
Prince William County	2,825	n/a	3,776	n/a	4,758	3,816	4,301	3,950	6,014	4,998
City of Manassas	74	n/a	64	n/a	54	54	155	155	142	142
City of Manassas Park	148	n/a	247	n/a	207	207	30	30	213	65
Stafford County	1,455	n/a	1,228	n/a	1,694	1,101	1,542	1,468	2,078	1,692
Virginia Suburbs	18,898	n/a	21,021	n/a	20,907	14,739	19,344	13,206	21,824	14,964
MSA Total	33,283	n/a	32,981	n/a	35,030	25,780	32,775	23,552	34,967	24,352
Central Jurisdictions	2,188	n/a	2,743	n/a	2,717	632	3,145	703	2,852	780
Inner Suburbs	16,895	n/a	13,991	n/a	14,389	10,095	14,612	9,835	13,584	8,405
Outer Suburbs	14,200	n/a	16,247	n/a	17,924	15,053	15,018	13,014	18,531	15,167



Source: U.S. Department of Commerce, Bureau of the Census, 2002 Annual Report, *Permit Authorized Construction in Permit-issuing Places by Metropolitan Area*.

*Included in county total.

MORTGAGE RATES, HOME SALES, AND INFLATION

MORTGAGE RATES, HOME SALES, AND HOUSING-RELATED INFLATION

Mortgage Rates

Mortgage rates continued to fall between 1998 and 2002 to a low of 6.2 percent in 2002 (fourth quarter). Average rates fell from 7.2 percent in 2001 to 6.7 percent in 2002.

Homes Sold

The number of homes sold in the region jumped dramatically between 1998 and 2002, from 63,281 units in 1998 to 93,053 units in 2002. Fairfax County had the most homes sold in the region in 2002, with 22,303.

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 3.8 percent between 2000 and 2001 to 2.4 percent between 2001 and 2002. Nationally, housing inflation decreased from 4.0 percent between 2000 and 2001 to 2.2 percent between 2001 and 2002. This measure accounts for price changes in rents and mortgage payments, owner costs, fuels, furnishings, and household supplies.

MORTGAGE RATES, HOME SALES, AND INFLATION

**Table 10. Terms on Conventional Home Mortgages, Averages for Closed Loans
In the Washington-Baltimore DC-MD-VA-WV CMSA, 1998 - 2002**

Quarter	Year				
	1998	1999	2000	2001	2002
First Quarter	7.2	7.0	8.1	7.3	7.0
Second Quarter	7.2	7.1	8.2	7.3	6.9
Third Quarter	7.1	7.4	8.1	7.2	6.5
Fourth Quarter	6.9	7.7	7.9	6.8	6.2

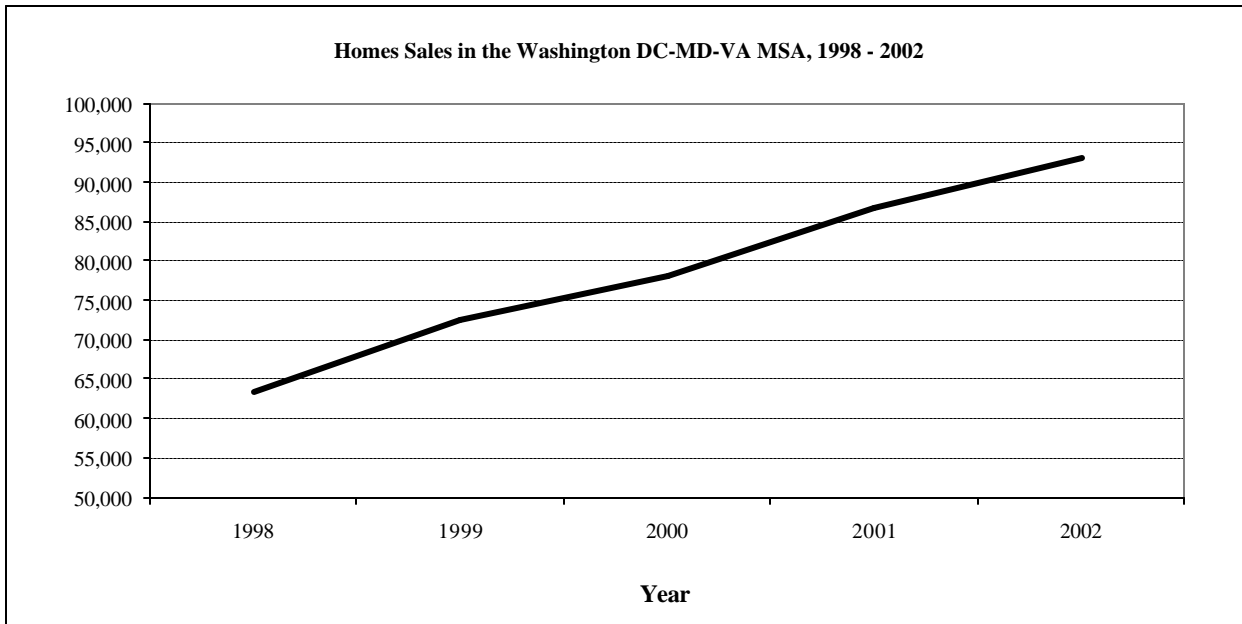


Source: Federal Housing Finance Board News report. Terms on Conventional Home Mortgages, Table IV – Average for Major Metropolitan Areas: Loans Closed.

MORTGAGE RATES, HOME SALES, AND INFLATION

Table 11. Net Home Sales in the Washington DC-MD-VA MSA, by Jurisdiction, 1998 – 2002

JURISDICTIONS	Year					Change 1998 - 2002	
	1998	1999	2000	2001	2002	Number	Percentage
District of Columbia	6,709	7,680	7,654	7,648	8,219	1,510	22.5%
Calvert County	1,236	1,244	1,302	1,621	1,631	395	32.0%
Charles County	1,552	1,762	1,677	2,192	2,486	934	60.2%
Frederick County	2,583	2,874	3,178	3,795	4,061	1,478	57.2%
Montgomery County	13,082	14,706	14,779	15,489	16,030	2,948	22.5%
Prince George's County	7,317	8,832	9,601	11,276	12,119	4,802	65.6%
Maryland Suburbs	25,770	29,418	30,537	34,373	36,327	10,557	41.0%
Arlington County	2,900	3,083	2,976	3,083	3,397	497	17.1%
City of Alexandria	2,091	2,419	2,713	2,973	3,074	983	47.0%
Fairfax County	16,789	18,713	19,894	21,181	22,303	5,514	32.8%
City of Fairfax	268	299	294	332	346	78	29.1%
City of Falls Church	216	201	185	172	211	-5	-2.3%
Loudoun County	2,995	3,855	5,019	6,179	6,735	3,740	124.9%
Prince William County	3,744	4,707	6,193	7,674	8,871	5,127	136.9%
City of Manassas	516	600	719	897	978	462	89.5%
City of Manassas Park	124	167	257	269	321	197	158.9%
Stafford County	1,159	1,356	1,557	2,032	2,271	1,112	95.9%
Virginia Suburbs	30,802	35,400	39,807	44,792	48,507	17,705	57.5%
Region Total	63,281	72,498	77,998	86,813	93,053	29,772	47.0%
Central Jurisdictions	11,700	13,182	13,343	13,704	14,690	2,990	25.6%
Inner Suburbs	37,672	42,751	44,753	48,450	51,009	13,337	35.4%
Outer Suburbs	13,909	16,565	19,902	24,659	27,354	13,445	96.7%

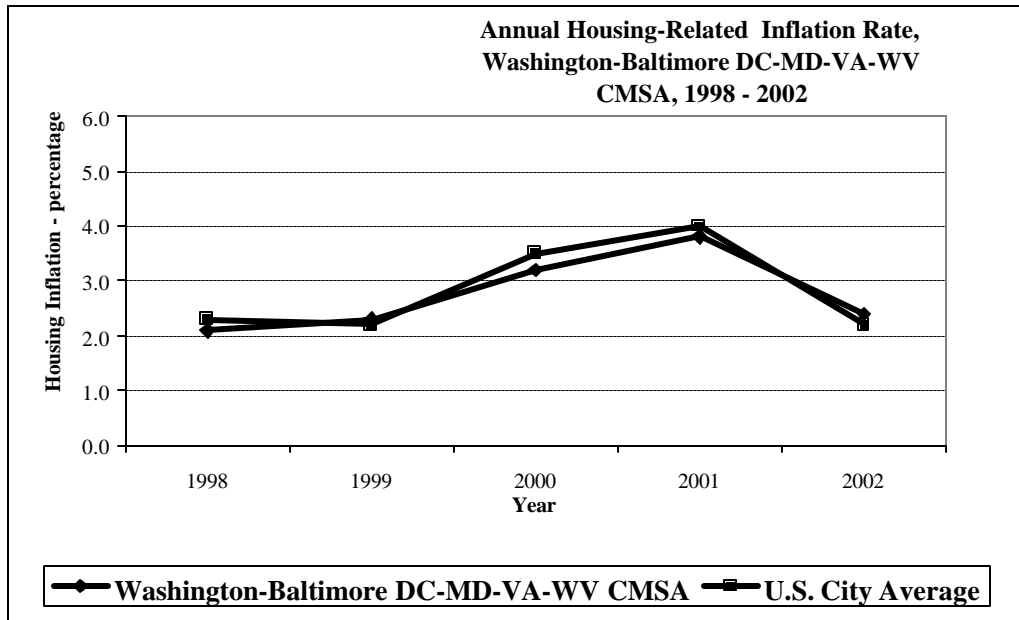


Source: Metropolitan Regional Information Systems, Inc., June 2003.

MORTGAGE RATES, HOME SALES, AND INFLATION

Table 12. Housing Component of the Consumer Price Index
All Urban Consumers, Washington-Baltimore DC-MD-VA-WV CMSA, 1998 - 2002

	Year				
	1998	1999	2000	2001	2002
Washington-Baltimore DC-MD-VA-WV CMSA					
CPI-U, Housing (Annual Average)	103.1	105.5	108.9	113.0	113.0
Housing Inflation Rate (%) - % Change	2.1	2.3	3.2	3.8	2.4
U.S. City Average					
CPI-U, Housing (Annual Average)	160.4	163.9	169.6	176.4	180.3
Housing Inflation Rate (%) - % Change	2.3	2.2	3.5	4.0	2.2



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.

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

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

INFLATION

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 declined from 2.6 percent between 2000 and 2001 to 2.4 percent between 2001 and 2002. Nationally, the rate of change declined from 2.8 percent between 2000 and 2001 to 1.6 percent between 2001 and 2002. The following topical changes were behind the regional inflation rate:

	1998*	1999	2000	2001	2002
Washington Metropolitan Region					
CPI-U (Annual Average)	102.1	104.2	107.6	110.4	113.0
Inflation Rate (%) - % Change	1.3	2.1	3.3	2.6	2.4
Expenditure Category					
Food and Beverages¹	101.6	103.1	105.5	108.7	111.7
Inflation Rate (%) - % Change	1.5	1.5	2.3	3.0	2.8
Housing¹	103.1	105.5	108.9	113.0	117.3
Inflation Rate (%) - % Change	2.1	2.3	3.2	3.8	3.8
Apparel¹	99.3	98.3	98.2	98.6	92.4
Inflation Rate (%) - % Change	0.8	-1	-0.1	0.4	-6.3
Transportation¹	98.4	100.3	107.3	107.7	105.7
Inflation Rate (%) - % Change	-1.9	1.9	7	0.4	-1.9
Medical Care¹	104.4	106.9	109.7	111.0	114.9
Inflation Rate (%) - % Change	2.3	2.4	2.6	1.2	3.5
Recreation²	101.4	102.8	103.7	105.2	106.8
Inflation Rate (%) - % Change	NA	1.4	0.9	1.4	1.5
Education and Communications²	101.4	102.6	104	107.9	111.5
Inflation Rate (%) - % Change	NA	1.2	1.4	3.8	3.3
Other Goods and Services¹	106.6	114.7	120.7	124.4	132.6
Inflation Rate (%) - % Change	3.9	7.6	5.2	3.1	6.6

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

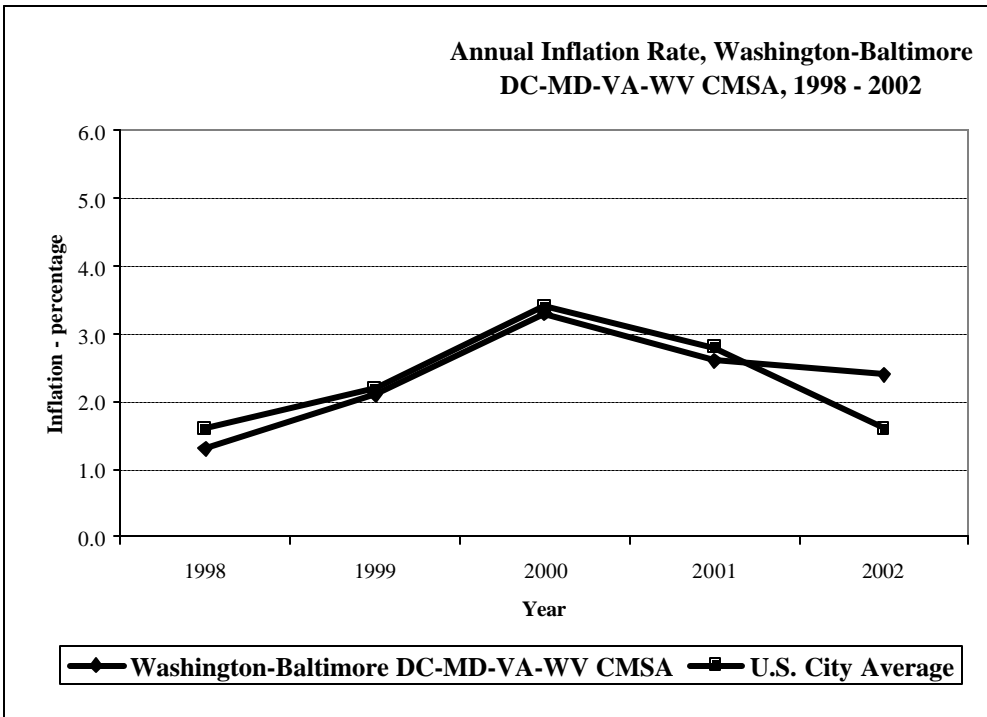
NOTE: CPI data for the Washington DC-MD-VA MSA no longer was published separately after December 1997. Beginning in 1998, the metropolitan Washington region became a component of the Washington-Baltimore DC-MD-VA-WV CMSA.

¹ Index is on a November 1996=100 base.

² Index is on a November 1997=100 base.

Table 13. Consumer Price Index and Inflation – All Urban Consumers in the Washington DC-MD-VA CMSA, 1998 - 2002

	Year				
	1998	1999	2000	2001	2002
Washington Metropolitan Region					
CPI-U (Annual Average)	102.1	104.2	107.6	110.4	113.0
Inflation Rate (%) - % Change	1.3	2.1	3.3	2.6	2.4
U.S. City Average					
CPI-U (Annual Average)	163.0	166.6	172.2	177.1	179.9
Inflation Rate (%) - % Change	1.6	2.2	3.4	2.8	1.6



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.

NOTE: CPI data for the Washington DC-MD-VA MSA no longer was published separately after December 1997.

Beginning in 1998, the metropolitan Washington 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

INCOME

Total personal income in the Washington region grew by an average annual rate of 8.4 percent between 1997 and 2001, leading to a 2001 total of \$200 billion. Total income growth was fastest in the outer suburbs, where income increased by an average of 11 percent per year.

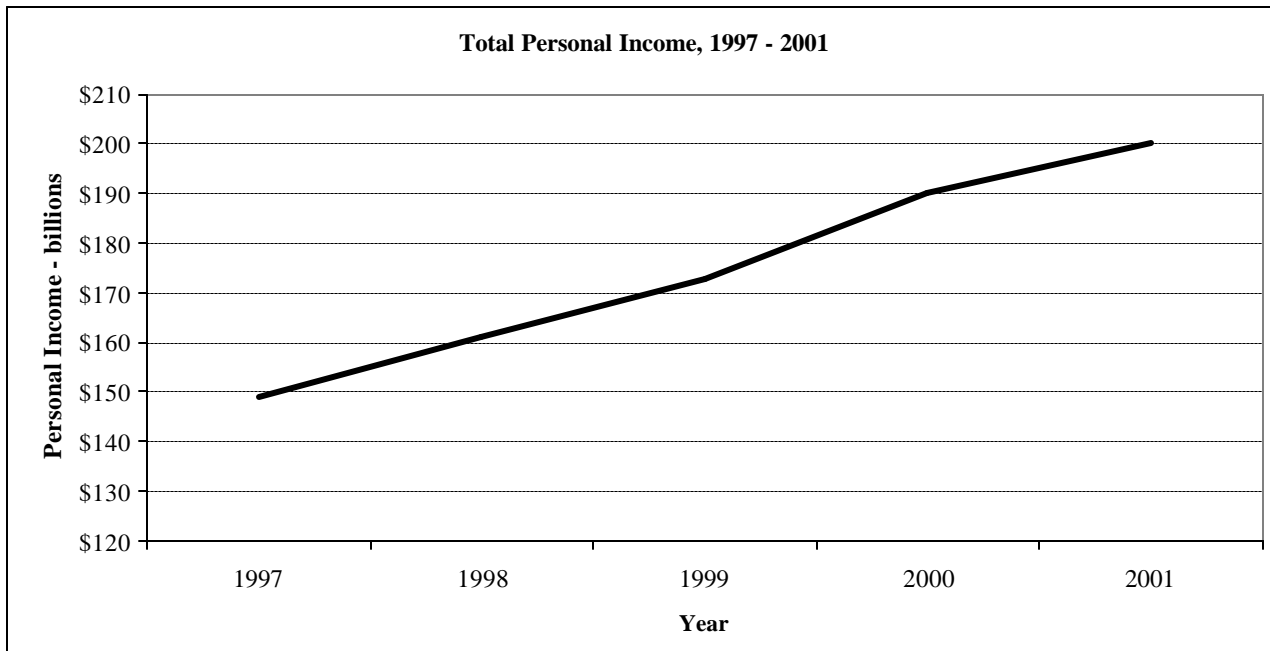
On a per capita basis, income varied greatly by jurisdiction. Fairfax County topped the region in per capita income at \$53,721. Stafford County had the lowest per capita income at \$27,726. The per capita income for the region was \$42,726 in 2001.

INCOME

**Table 14. Total Personal Income in the Washington DC-MD-VA MSA,
by Jurisdiction, 1997 – 2001**

(Thousands of Dollars)

JURISDICTIONS	Year					Avg. Annual Percentage Change 1997 - 2001
	1997	1998	1999	2000	2001	
District of Columbia	\$19,134,994	\$20,255,369	\$20,785,253	\$22,848,624	\$23,262,315	5.4%
Calvert County	1,815,564	1,916,009	2,034,379	2,275,910	2,453,086	8.8%
Charles County	2,956,769	3,103,154	3,263,241	3,586,853	3,794,581	7.1%
Frederick County	4,978,269	5,411,750	5,784,912	6,317,577	6,766,108	9.0%
Montgomery County	33,702,721	36,703,345	39,152,318	43,112,963	45,573,769	8.8%
Prince George's County	20,616,650	21,712,782	22,635,806	24,394,332	25,444,370	5.9%
Maryland Suburbs	\$64,069,973	\$68,847,040	\$72,870,656	\$79,687,635	\$84,031,914	7.8%
Arlington County	7,603,407	8,163,306	8,587,245	9,412,172	9,736,773	7.0%
City of Alexandria	4,984,432	5,392,014	5,714,399	6,258,166	6,482,861	7.5%
Fairfax County a/	39,409,355	42,952,335	47,658,036	51,991,928	54,859,481	9.8%
Loudoun County	4,372,597	5,069,284	5,847,791	6,794,171	7,641,832	18.7%
Prince William County b/	7,803,691	8,308,177	8,957,178	10,087,985	10,782,623	9.5%
Stafford County	1,949,116	2,055,005	2,222,974	2,523,545	2,736,670	10.1%
Virginia Suburbs	\$66,122,598	\$71,940,121	\$78,987,623	\$87,067,967	\$92,240,240	9.9%
MSA Total	\$149,327,565	\$161,042,530	\$172,643,532	\$189,604,226	\$199,534,469	8.4%
Central Jurisdictions	\$31,722,833	\$33,810,689	\$35,086,897	\$38,518,962	\$39,481,949	6.1%
Inner Suburbs	\$93,728,726	\$101,368,462	\$109,446,160	\$119,499,223	\$125,877,620	8.6%
Outer Suburbs	\$23,876,006	\$25,863,379	\$28,110,475	\$31,586,041	\$34,174,900	10.8%



Source: U.S. Department of Commerce, Bureau of Economic Analysis, Regional Economic System.
Data Released May 6, 2003.

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.

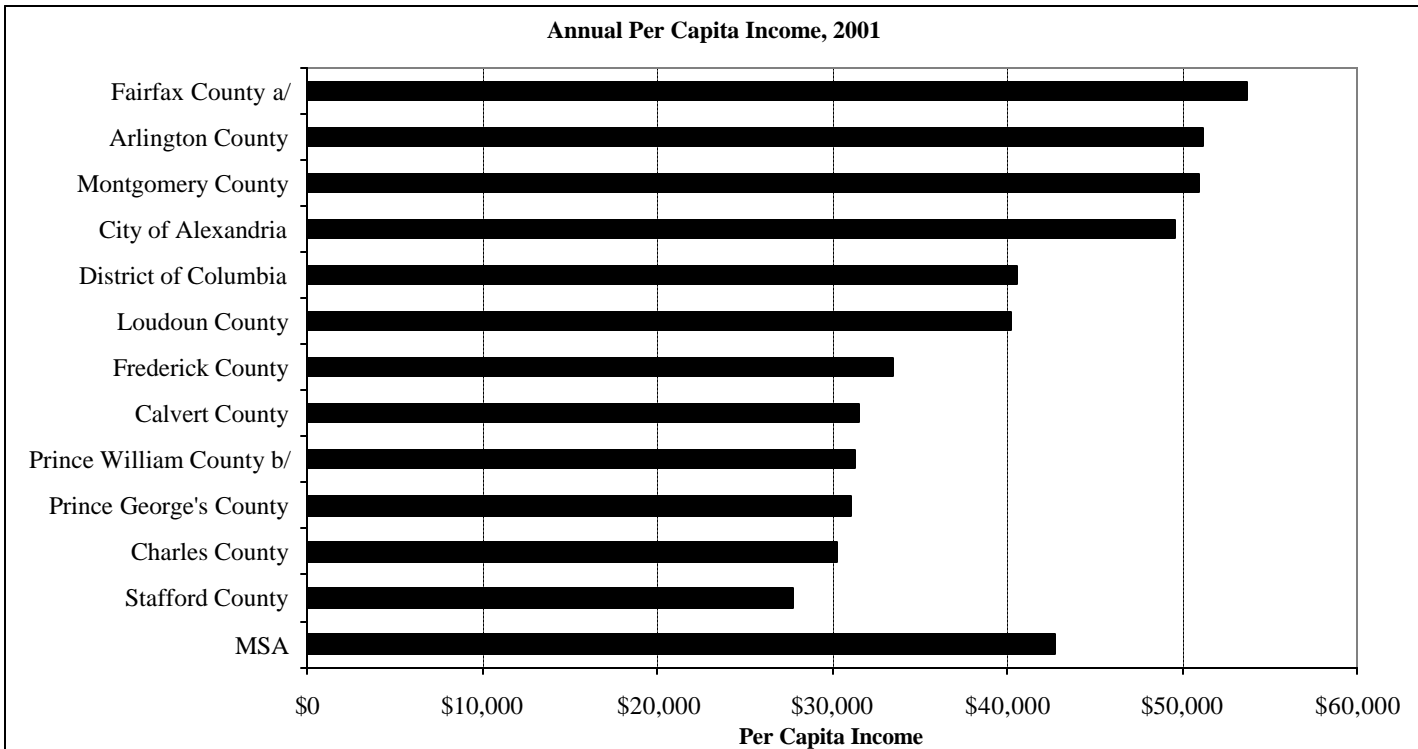
INCOME

**Table 15. Per Capita Income in the Washington DC-MD-VA MSA,
by Jurisdiction, 1997 - 2002**

(Dollars)

JURISDICTIONS	Year					Avg. Annual Percentage Change 1997 - 2001	Ratio to MSA 2001
	1997	1998	1999	2000	2001		
District of Columbia	\$33,704	\$35,836	\$36,452	\$39,970	\$40,539	5.1%	94.9%
Calvert County	26,450	26,979	27,923	30,268	31,563	4.8%	73.9%
Charles County	26,036	26,711	27,521	29,574	30,300	4.1%	70.9%
Frederick County	27,161	28,918	30,192	32,134	33,423	5.8%	78.2%
Montgomery County	40,342	43,303	45,402	49,107	50,919	6.6%	119.2%
Prince George's County	26,409	27,518	28,471	30,340	31,037	4.4%	72.6%
Maryland Suburbs	\$32,333	\$34,236	\$35,713	\$38,403	\$39,634	5.6%	92.8%
Arlington County	41,151	43,726	45,504	49,683	51,221	6.1%	119.9%
City of Alexandria	41,561	44,143	45,472	48,427	49,553	4.8%	116.0%
Fairfax County a/	41,267	44,362	48,271	51,596	53,721	7.5%	125.7%
Loudoun County	32,301	34,691	36,981	39,055	40,182	6.1%	94.0%
Prince William County b/	26,107	27,053	28,235	30,602	31,244	4.9%	73.1%
Stafford County	23,490	23,805	24,855	26,953	27,726	4.5%	64.9%
Virginia Suburbs	\$37,212	\$39,691	\$42,319	\$45,263	\$46,678	6.4%	109.2%
MSA	\$34,517	\$36,660	\$38,561	\$41,487	\$42,726	5.9%	100.0%

Annual Per Capita Income, 2001



Source: U.S. Department of Commerce, Bureau of Economic Analysis (BEA), Regional Economic Information System.
Data Released May 6, 2003.

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.

RETAIL SALES

Retail sales in the region increased both in current and real terms between 1998 and 2002. However, the area's 2002 total of \$60.5 billion, when adjusted for inflation, was greater than the total annual retail sales in 2001, \$59.5 billion, and slightly more than the 2000 total of \$60.2 billion.

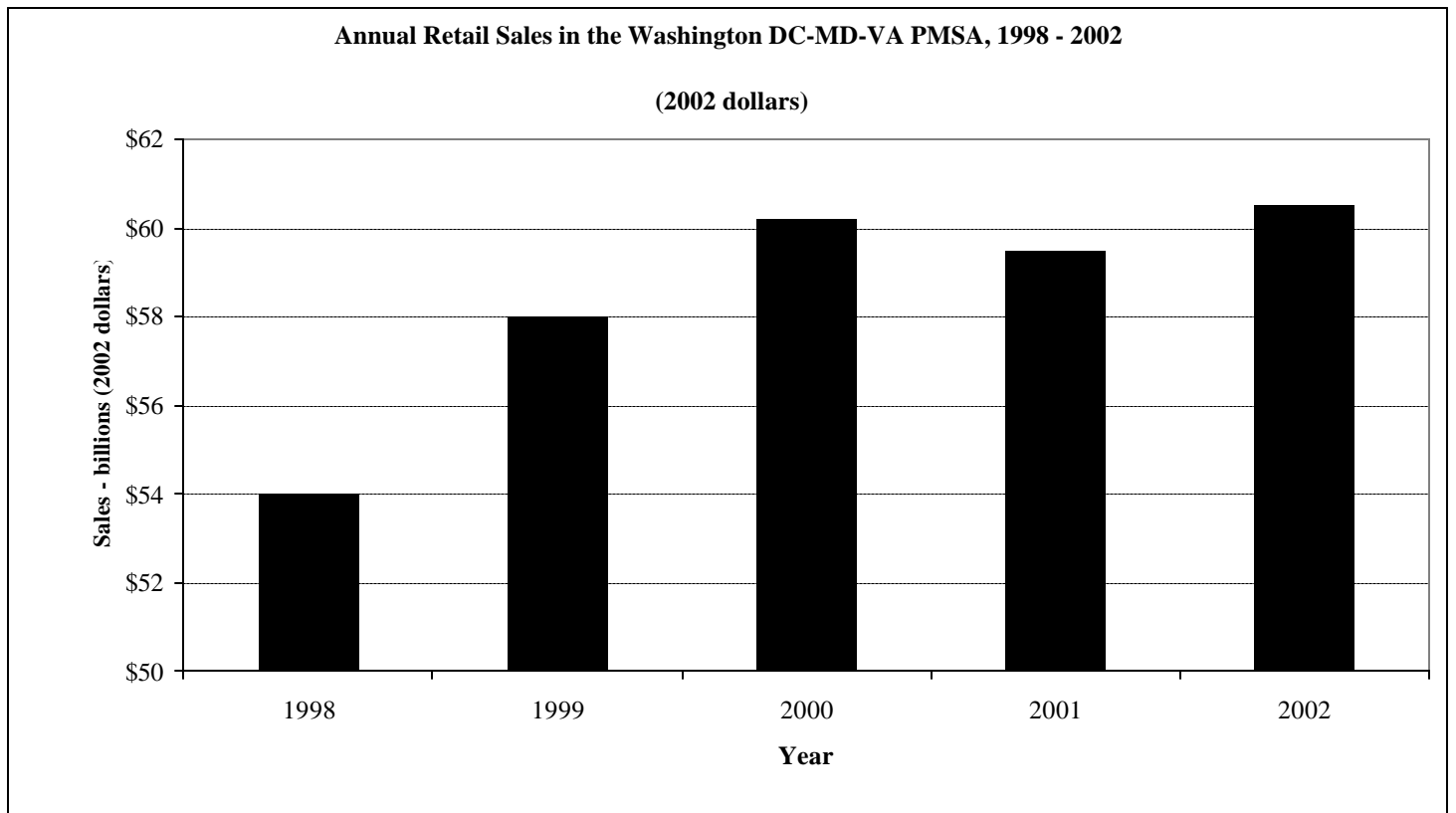
When adjusted for inflation, retail sales in the region increased by 12 percent between 1998 and 2002. Nationally, sales increased by 10.9 percent.

RETAIL SALES

Table 16. Estimated Total Annual Retail Sales in the Washington DC-MD-VA PMSA, 1998 - 2002

(Millions of Dollars)

	Year					Change 1998 - 2002	
	1998	1999	2000	2001	2002	Number	Percentage
Washington DC-MD-VA PMSA							
Sales estimated (Current Dollars)	\$48,829	\$53,608	\$57,529	\$58,432	\$60,506	\$11,677	23.9%
Sales estimated (2002 dollars)	\$54,014	\$58,017	\$60,240	\$59,503	\$60,506	\$6,492	12.0%
United States							
Sales reported (Current Dollars)	\$2,644,951	\$2,878,424	\$3,071,692	\$3,153,315	\$3,245,407	\$600,456	22.7%
Sales reported (2002 dollars)	\$2,925,831	\$3,115,177	\$3,216,431	\$3,211,115	\$3,245,407	\$319,576	10.9%



Source: U.S. Department of Commerce, Bureau of the Census, *Annual Benchmark Report for Retail Trade and Food Services: January 1992 Through March 2002*.
 NOTE: Published data from the Census Bureau for retail sales for the Washington DC-MD-VA MSA no longer are available after 1996. Data for 1998 - 2002 are estimated by The Center for Regional Analysis, George Mason University.

AIRLINE PASSENGERS

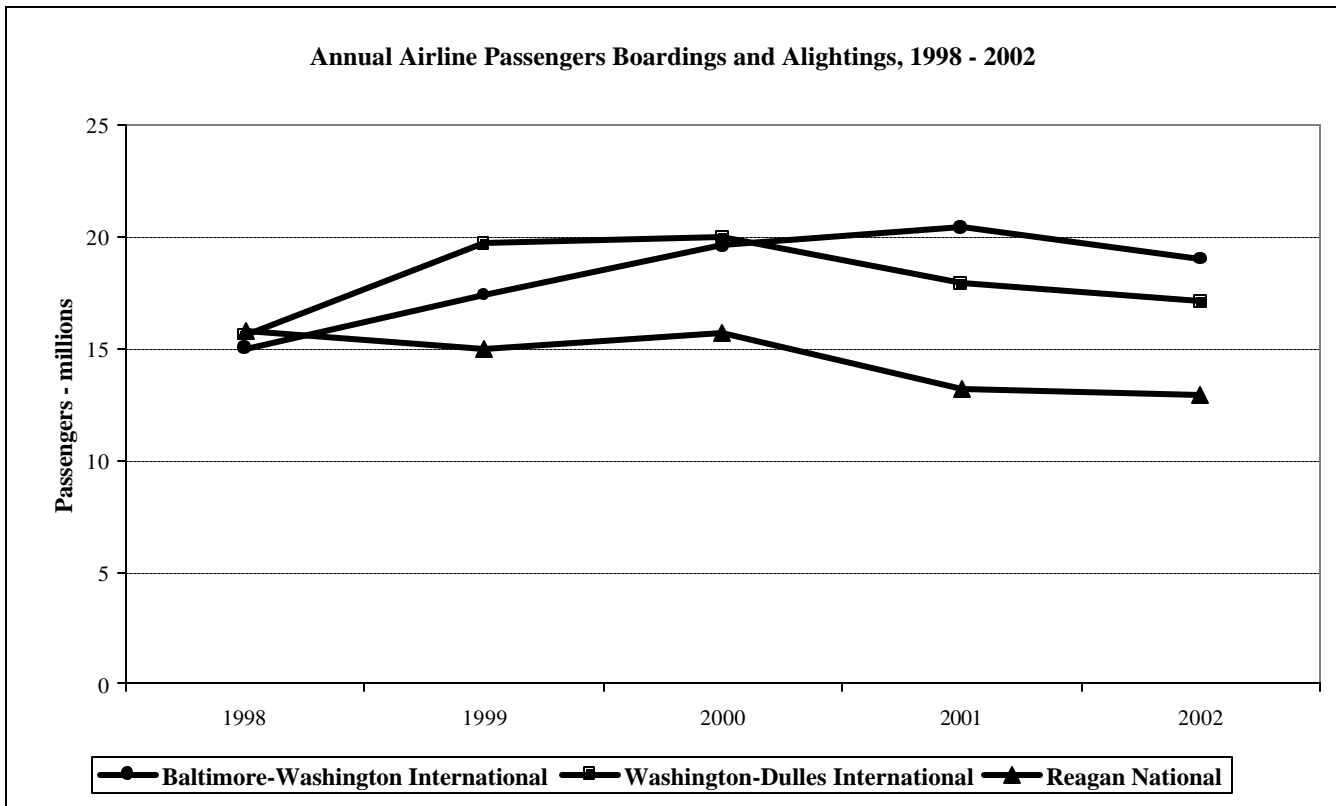
More than 49 million passengers flew into or out of the Washington region's three major airports in 2002, a 5.4 percent increase from 1998. Baltimore-Washington International led the three airports in total airline passengers served, with 19 million. 17.1 million passengers passed through Washington-Dulles International, while Reagan Washington National Airport served 12.9 million. Reagan National continued to experience the effects of the September 11th attack, with commercial passenger service down by 18 percent since 2000.

AIRLINE PASSENGERS

Table 17. Number of Air Passengers Traveling to or from BWI, Dulles, and Reagan National Airports, 1998 – 2002

(Thousands of Passengers)

	Year					Change 1998 - 2002	
	1998	1999	2000	2001	2002	Passengers	Percentage
Baltimore-Washington International Airport	15,004	17,438	19,603	20,370	19,013	4,009	26.7%
Washington-Dulles International Airport	15,619	19,652	19,971	17,860	17,075	1,456	9.3%
Ronald Reagan Washington National Airport	15,809	15,021	15,725	13,168	12,872	-2,937	-18.6%
Total Air Passengers	46,432	52,111	55,299	51,398	48,960	2,528	5.4%



Source: Research & Analysis, Office of Marketing and Development, Maryland Aviation Administration, Maryland Department of Transportation, *Washington Area Comparative Activity Summary Report Calendar Year 2002*.

Appendix A. Geographic Specificity of Economic Trends Data

The data presented in this report come from a variety of sources, each with its own methodology and area of coverage. COG works to ensure that the data are presented for as many local governments as possible. Wherever possible, data prepared by COG — including population and commercial construction — include information for all COG member local governments. COG relies on other data sources, however, for much of the other information in this report and is dependent on the geography used by them.

Data Item	Geographic Specificity of Economic Trends Data		
	Region	Counties & Virginia Ind. Cities a/	All COG Members
Population, 1998 - 2002	X	X	X
Population Forecast, 2000 - 2030	X	X b/	
Employment, 1998 - 2002	X	X	
Employment Forecast, 2000 - 2030	X	X b/	
Federal Spending, 1998 - 2002	X	X	
Labor Force, 1998 - 2002	X		
Commercial Construction Starts, 1998 - 2002	X	X	X
New Homes Permitted, 1998 - 2002	X	X	X c/
Effective Mortgage Rates, 1998 - 2002	X		
Home Sales, 1998 - 2002	X	X d/	
Housing-Related Inflation, 1998 - 2002	X		
Inflation, 1998 - 2002	X		
Total Personal Income, 1997 - 2001	X	X e/	
Per Capita Income, 1997 - 2001	X	X e/	
Retail Sales, 1998 - 2002	X		
Air Passengers, 1998 - 2002	X		

a/ Independent cities in the Commonwealth of Virginia are distinct and separate from the counties that may surround them. As a result, most government data sources report information separately for these Virginia cities and counties. Because cities in Maryland remain a part of their counties, these same government sources do not report data out separately for the city and county, but rather include the city in county totals.

b/ The City of Rockville is the only Maryland city that participates in COG’s Cooperative Forecasting Process.

c/ The Census Bureau reports permit data for some, but not all, Maryland cities.

d/ Housing Data reports combine Arlington and Alexandria, and include the Cities of Fairfax and Falls Church.

e/ The Bureau of Economic Analysis includes the Cities of Fairfax and Falls Church in Fairfax County income data, and Manassas and Manassas Park in Prince William County data.

APPENDIX B

**Appendix Table 1. Direct Federal Expenditures and Obligations
in the Washington DC-MD-VA MSA by Jurisdiction, FY 2001**

(Thousands of Dollars)

JURISDICTIONS	Grant Awards	Salaries and Wages	Retirement and Disability Payments	Procurement Contract Awards	Other Direct Payments	Total	2001 Total	
							Department of Defense	Non-Defense
District of Columbia	\$4,020,260	\$12,646,499	\$1,834,560	\$10,262,726	\$2,176,612	\$30,940,657	\$2,871,230	\$28,069,428
Calvert County	33,206	6,606	170,290	6,535	44,337	\$260,974	27,683	233,291
Charles County	58,373	135,474	303,708	40,472	88,920	\$626,947	198,511	428,435
Frederick County	93,323	194,120	381,905	271,422	117,051	\$1,057,821	302,930	754,891
Montgomery County	857,456	3,101,538	2,023,885	3,941,614	702,083	\$10,626,576	1,745,373	8,881,202
Prince George's County	1,369,851	1,868,131	1,872,303	2,219,721	630,166	\$7,960,172	1,227,304	6,732,867
Maryland Suburbs	\$2,412,209	\$5,305,869	\$4,752,091	\$6,479,764	\$1,582,557	\$20,532,490	\$3,501,801	\$17,030,686
Arlington County	293,307	2,672,044	475,074	3,163,259	155,652	\$6,759,336	3,114,726	3,644,610
City of Alexandria	185,936	533,958	570,857	1,199,127	158,198	\$2,648,076	1,468,071	1,180,005
Fairfax County	337,901	1,000,056	2,008,863	7,174,693	757,863	\$11,279,376	5,610,855	5,668,522
City of Fairfax	60,573	45,462	288,319	2,154,933	56,021	\$2,605,308	1,158,551	1,446,757
City of Falls Church	98,692	213,466	88,492	538,877	38,256	\$977,783	432,894	544,889
Loudoun County	19,973	274,343	265,603	551,327	52,913	\$1,164,159	520,578	643,581
Prince William County	97,881	411,236	519,908	348,513	68,934	\$1,446,472	837,062	609,409
City of Manassas	16,735	28,145	120,225	444,936	34,086	\$644,127	425,181	218,948
City of Manassas Park	7,831	732	2,365	1,817	1,466	\$14,211	2,438	11,773
Stafford County	11,976	9,713	173,965	13,112	23,514	\$232,280	68,520	163,759
Virginia Suburbs	\$1,130,805	\$5,189,155	\$4,513,671	\$15,590,594	\$1,346,903	\$27,771,128	\$13,638,876	\$14,132,253
MSA Total	\$7,563,274	\$23,141,523	\$11,100,322	\$32,333,084	\$5,106,072	\$79,244,275	\$20,011,907	\$59,232,367
Percentage of Total	9.5%	29.2%	14.0%	40.8%	6.4%	100.0%	25.3%	74.7%
Central Jurisdictions	4,499,503	15,852,501	2,880,491	14,625,112	2,490,462	40,348,069	7,454,027	32,894,043
Inner Suburbs	2,724,473	6,228,653	6,281,862	16,029,838	2,184,389	33,449,215	10,174,977	23,274,237
Outer Suburbs	339,298	1,060,369	1,937,969	1,678,134	431,221	5,446,991	2,382,903	3,064,087

Source: U.S. Dept. of Commerce, Economics and Statistics Administration, Bureau of the Census, Consolidated Federal Funds Report, 2001.

NOTE: Grants 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.

**Appendix Table 2. Direct Federal Expenditures and Obligations
in the Washington DC-MD-VA MSA by Jurisdiction, FY 2000**

(Thousands of Dollars)

Source: U.S. Dept. of Commerce, Economics and Statistics Administration, Bureau of the Census, Consolidated Federal Funds Report, 2000.

JURISDICTIONS	Grant Awards	Salaries and Wages	Retirement and Disability Payments	Procurement Contract Awards	Other Direct Payments	Total	2000 Total	
							Department of Defense	Non-Defense
District of Columbia	\$4,674,655	\$12,207,957	\$1,768,405	\$7,490,511	\$2,112,903	\$28,254,431	\$2,521,127	\$25,733,305
Calvert County	32,132	6,780	152,996	9,082	41,033	\$242,023	24,675	217,348
Charles County	60,249	137,629	276,650	47,117	84,012	\$605,657	205,592	400,065
Frederick County	92,362	194,330	348,374	162,837	108,312	\$906,215	249,891	656,323
Montgomery County	794,575	3,223,314	1,883,761	3,835,155	643,609	\$10,380,414	1,714,984	8,665,430
Prince George's County	666,692	2,014,673	1,734,176	2,343,907	582,519	\$7,341,967	1,316,166	6,025,802
Maryland Suburbs	\$1,646,010	\$5,576,726	\$4,395,957	\$6,398,098	\$1,459,485	\$19,476,276	\$3,511,308	\$15,964,968
Arlington County	309,316	2,922,955	455,754	2,659,125	136,404	\$6,483,554	3,046,031	3,437,522
City of Alexandria	149,439	534,356	480,828	1,182,923	159,074	\$2,506,620	1,484,348	1,022,272
Fairfax County	336,704	941,143	1,879,886	6,666,990	579,238	\$10,403,961	4,830,230	5,573,732
City of Fairfax	66,783	48,758	229,443	2,028,874	63,975	\$2,437,833	905,762	1,532,071
City of Falls Church	27,926	231,182	77,502	1,584,009	35,076	\$1,955,695	1,441,224	514,471
Loudoun County	21,265	248,942	242,322	434,407	48,558	\$995,494	365,962	629,532
Prince William County	52,865	393,875	472,246	267,249	64,086	\$1,250,321	717,069	533,252
City of Manassas	30,639	23,187	95,061	515,240	33,211	\$697,338	491,233	206,106
City of Manassas Park	6,429	835	2,190	198	1,466	\$11,118	971	10,147
Stafford County	44,601	8,763	152,075	4,168	21,649	\$231,256	53,701	177,555
Virginia Suburbs	\$1,045,967	\$5,353,996	\$4,087,307	\$15,343,183	\$1,142,737	\$26,973,190	\$13,336,531	\$13,636,660
MSA Total	\$7,366,632	\$23,138,679	\$10,251,669	\$29,231,792	\$4,715,125	\$74,703,897	\$19,368,966	\$55,334,933
Percentage of Total	9.9%	31.0%	13.7%	39.1%	6.3%	100.0%	25.9%	74.1%
Central Jurisdictions	5,133,410	15,665,268	2,704,987	11,332,559	2,408,381	37,244,605	7,051,506	30,193,099
Inner Suburbs	1,892,680	6,459,070	5,804,768	16,458,935	1,904,417	32,519,870	10,208,366	22,311,506
Outer Suburbs	340,542	1,014,341	1,741,914	1,440,298	402,327	4,939,422	2,109,094	2,830,328

NOTE: Grants 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.

APPENDIX B

**Appendix Table 3. Direct Federal Expenditures and Obligations
in the Washington DC-MD-VA MSA by Jurisdiction, FY 1999**

(Thousands of Dollars)

JURISDICTIONS	Grant Awards	Salaries and Wages	Retirement and Disability Payments	Procurement Contract Awards	Other Direct Payments	Total	1999 Total	
							Department of Defense	Non-Defense
District of Columbia	\$5,292,757	\$11,975,166	\$1,717,753	\$6,403,378	\$1,644,611	\$27,033,665	\$2,562,349	\$24,471,316
Calvert County	22,877	7,724	147,239	5,344	37,525	\$220,709	25,139	195,570
Charles County	56,373	159,074	252,157	55,292	64,317	\$587,213	231,051	356,162
Frederick County	75,577	165,701	317,130	86,136	97,065	\$741,609	165,139	576,469
Montgomery County	672,096	2,748,403	1,802,106	3,443,908	544,300	\$9,210,813	1,708,861	7,501,952
Prince George's County	530,375	1,723,376	1,602,423	2,538,211	480,221	\$6,874,606	1,333,655	5,540,953
Maryland Suburbs	\$1,357,298	\$4,804,278	\$4,121,055	\$6,128,891	\$1,223,428	\$17,634,950	\$3,463,845	\$14,171,106
Arlington County	145,585	2,578,364	433,343	2,403,252	108,549	\$5,669,093	3,205,309	2,463,784
City of Alexandria	93,179	490,016	527,259	1,130,147	133,369	\$2,373,970	1,473,121	900,849
Fairfax County	240,452	882,681	1,656,103	6,940,051	537,813	\$10,257,100	5,117,231	5,139,869
City of Fairfax	66,737	42,495	242,889	1,701,316	40,939	\$2,094,376	882,588	1,211,786
City of Falls Church	122,142	217,130	90,436	504,491	32,504	\$966,703	480,395	486,309
Loudoun County	17,451	221,197	185,653	286,065	40,060	\$750,426	185,691	564,736
Prince William County	59,263	393,142	416,161	286,308	50,974	\$1,205,848	779,892	425,955
City of Manassas	37,798	21,337	85,738	435,998	25,732	\$606,603	403,483	203,120
City of Manassas Park	6,312	840	813	1,691	323	\$9,979	2,335	7,645
Stafford County	20,631	8,459	147,711	17,450	19,474	\$213,725	60,964	152,761
Virginia Suburbs	\$809,550	\$4,855,661	\$3,786,106	\$13,706,769	\$989,737	\$24,147,823	\$12,591,009	\$11,556,814
MSA Total	\$7,459,605	\$21,635,105	\$9,624,914	\$26,239,038	\$3,857,776	\$68,816,438	\$18,617,203	\$50,199,236
Percentage of Total	10.8%	31.4%	14.0%	38.1%	5.6%	100.0%	27.1%	72.9%
Central Jurisdictions	5,531,521	15,043,546	2,678,355	9,936,777	1,886,529	35,076,728	7,240,779	27,835,949
Inner Suburbs	1,631,802	5,614,085	5,393,957	15,127,977	1,635,777	29,403,598	9,522,730	19,880,869
Outer Suburbs	296,282	977,474	1,552,602	1,174,284	335,470	4,336,112	1,853,694	2,482,418

Source: U.S. Dept. of Commerce, Economics and Statistics Administration, Bureau of the Census, Consolidated Federal Funds Report, 1999.
NOTE: Grants 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.

**Appendix Table 4. Direct Federal Expenditures and Obligations
in the Washington DC-MD-VA MSA by Jurisdiction, FY 1998**

(Thousands of Dollars)

JURISDICTIONS	Grant Awards	Salaries and Wages	Retirement and Disability Payments	Procurement Contract Awards	Other Direct Payments	Total	1998 Total	
							Department of Defense	Non-Defense
District of Columbia	\$4,101,064	\$11,435,809	\$1,682,581	\$5,200,075	\$1,614,878	\$24,034,407	\$2,273,659	\$21,760,748
Calvert County	21,694	7,131	140,292	5,818	40,899	\$215,834	24,485	191,349
Charles County	51,809	159,312	237,869	44,185	75,087	\$568,262	219,725	348,537
Frederick County	68,297	150,944	299,424	81,303	100,258	\$700,226	163,110	537,116
Montgomery County	645,072	2,618,081	1,731,163	3,497,512	590,187	\$9,082,015	1,733,188	7,348,826
Prince George's County	552,437	1,620,212	1,592,348	2,511,389	541,932	\$6,818,318	1,284,888	5,533,430
Maryland Suburbs	\$1,339,309	\$4,555,680	\$4,001,096	\$6,140,207	\$1,348,363	\$17,384,655	\$3,425,396	\$13,959,258
Arlington County	131,727	2,559,419	431,132	2,279,530	132,292	\$5,534,100	3,072,714	2,461,387
City of Alexandria	85,526	451,776	455,462	1,063,993	145,482	\$2,202,239	1,297,666	904,573
Fairfax County	272,185	860,218	1,584,946	7,120,328	561,386	\$10,399,063	5,580,838	4,818,225
City of Fairfax	55,131	44,351	213,282	1,354,231	70,052	\$1,737,047	741,981	995,065
City of Falls Church	162,781	208,259	81,901	386,207	32,996	\$872,144	417,585	454,559
Loudoun County	18,149	207,933	167,311	134,464	45,973	\$573,830	97,002	476,829
Prince William County	55,972	330,615	394,726	205,323	62,740	\$1,049,376	612,673	436,703
City of Manassas	22,292	20,856	76,191	511,942	29,997	\$661,278	457,548	203,730
City of Manassas Park	1,598	752	770	2,600	1,483	\$7,203	3,059	4,144
Stafford County	25,865	7,697	134,223	11,369	20,683	\$199,837	50,235	149,602
Virginia Suburbs	\$831,226	\$4,691,876	\$3,539,944	\$13,069,987	\$1,103,084	\$23,236,117	\$12,331,301	\$10,904,817
MSA Total	\$6,271,599	\$20,683,365	\$9,223,621	\$24,410,269	\$4,066,325	\$64,655,179	\$18,030,356	\$46,624,823
Percentage of Total	9.7%	32.0%	14.3%	37.8%	6.3%	100.0%	27.9%	72.1%
Central Jurisdictions	4,318,317	14,447,004	2,569,175	8,543,598	1,892,652	31,770,746	6,644,039	25,126,708
Inner Suburbs	1,687,606	5,351,121	5,203,640	14,869,667	1,796,553	28,908,587	9,758,480	19,150,105
Outer Suburbs	265,676	885,240	1,450,806	997,004	377,120	3,975,846	1,627,837	2,348,010

Source: U.S. Dept. of Commerce, Economics and Statistics Administration, Bureau of the Census, Consolidated Federal Funds Report, 1998.

NOTE: Grants 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.

APPENDIX C

APPENDIX C – Local and State Government Economic Development Offices

CITY OF ALEXANDRIA, VIRGINIA

Alexandria Economic
Development Partnership, Inc.
1729 King Street, Suite 410
Alexandria, VA 22314
(703) 739-3820
(703) 739-1384 (fax)
www.alexecon.org (Web)
alexecon@erols.com (e-mail)

ARLINGTON COUNTY, VIRGINIA

Department of Economic Development
1100 North Glebe Road, Suite 1500
Arlington, VA 22201
(703) 228-0808
(703) 228-0804 (fax)
www.arlingtonvirginiausa.com (Web)
arlington@smartplace.org (e-mail)

CITY OF BOWIE, MARYLAND

Department of Planning
and Economic Development
2614 Kenhill Drive
Bowie, MD 20715
(301) 809-3047
(301) 809-2315 (fax)
www.cityofbowie.org (Web)
cmcgee@cityofbowie.org (e-mail)

CALVERT COUNTY, MARYLAND

Department of Economic Development
Courthouse
Prince Frederick, MD 20678
(410) 535-4583
(410) 535-4585 (fax)
www.co.cal.md.us/cced (Web)
cced@co.cal.md.us (e-mail)

CHARLES COUNTY, MARYLAND

Economic Development Commission
8730 Mitchell Road
P.O. Box 910
La Plata, MD 20646
(301) 934-7633
(301) 934-7656 (fax)
www.ccbiz.org (Web)

CITY OF COLLEGE PARK, MARYLAND

Planning, Community, and Economic Development
4500 Knox Road
College Park, MD 20740
(301) 277-3445
(301) 887-0558 (fax)
rcate@ci.college-park.md.us (e-mail)

DISTRICT OF COLUMBIA

Deputy Mayor for Planning and
Economic Development
John A. Wilson Building
1350 Pennsylvania Avenue, N.W., Suite 317
Washington, DC 20004
(202) 727-6365
(202) 727-6703 (fax)
www.dcbiz.dc.gov (Web)

FAIRFAX COUNTY, VIRGINIA

Economic Development Authority
8300 Boone Boulevard, Suite 450
Vienna, VA 22182
(703) 790-0600
(703) 893-1269 (fax)
www.fairfaxcountyleda.org (Web)

CITY OF FAIRFAX, VIRGINIA

Office of Economic Development
10455 Armstrong Street
Fairfax, VA 22030
(703) 385-7851
(703) 385-7811 (fax)
www.ci.fairfax.va.us (Web)
eberner@ci.fairfax.va.us (e-mail)

CITY OF FALLS CHURCH, VIRGINIA

Economic Development Authority
119 Rowell Court
Falls Church, VA 22046
(703) 538-7079
(703) 538-7161 (fax)
www.fallschurcheda.org (Web)
info@fallschurcheda.org (e-mail)

FREDERICK COUNTY, MARYLAND

Office of Economic Development
1800 N. Market Street, Suite 200
Frederick, MD 21701
(301) 694-1058
(301) 631-2340 (fax)
www.discoverfrederickmd.com (Web)
info@discoverfrederickmd.com (e-mail)

CITY OF GAITHERSBURG, MARYLAND

Office of Economic Development
City Hall
31 S. Summit Avenue
Gaithersburg, MD 20877
(301) 258-6300
(301) 948-6149 (fax)
www.ci.gaithersburg.md.us (Web)
ttomasello@ci.gaithersburg.md.us (e-mail)

CITY OF GREENBELT, MARYLAND

Department of Planning and Community
Development
25 Crescent Road
Greenbelt, MD 20770
(301) 345-5417
(301) 345-5418
www.ci.greenbelt.md.us (Web)
thruby@ci.greenbelt.md.us (e-mail)

LOUDOUN COUNTY, VIRGINIA

Department of Economic
Development
1 Harrison Street, SE – 5th Floor
Leesburg, VA 20177
P.O. Box 7000
(703) 777-0426
Metro: (703) 478-8434
(703) 771-5363 (fax)
www.loudoun.gov/business (Web)
good4biz@loudoun.gov (e-mail)

CITY OF MANASSAS, VIRGINIA

Office of Community & Economic Development
9027 Center Street, Room 202
P.O. Box 560
Manassas, VA 20108
(703) 257-8223
(703) 257-5117 (fax)
www.manassacity.org (Web)
evia@ci.manassas.va.us (e-mail)

MONTGOMERY COUNTY, MARYLAND

Department of Economic Development
101 Monroe Street, Suite 1500
Rockville, MD 20850
(240) 777-2000
(240) 777-2001 (fax)
www.montgomerycountymd.gov (Web)
arnetta.quarles@montgomerycountymd.gov (e-mail)

PRINCE GEORGE'S COUNTY, MARYLAND

Economic Development Corporation
4640 Forbes Boulevard, Suite 200
Lanham, MD 20706
(301) 429-3044
(301) 429- 8762 (fax)
www.pgcedc.com (Web)
info@pgcedc.com (e-mail)

PRINCE WILLIAM COUNTY, VIRGINIA

Department of Economic Development
10530 Linden Lake Plaza, Suite 105
Manassas, VA 20109
(703) 392-0330
(703) 392-0302 (fax)
www.pwcecondev.org (Web)
econdev@pwgov.org (e-mail)

CITY OF ROCKVILLE, MARYLAND

Greater Rockville Partnership, Inc.
401 North Washington Street, Suite 160
Rockville, MD 20850
(301) 315-8096
(301) 315-8097 (fax)
www.greaterrockville.org (Web)
lara@greaterrockville.org (e-mail)

SPOTSYLVANIA COUNTY, VIRGINIA

Office of Economic Development
4704 Southpoint Parkway
Fredericksburg, VA 22407-2657
(540) 891-2602
(540) 891-2605 (fax)
www.spotsylvania.org (Web)
spotsyed@aol.com (e-mail)

APPENDIX C

STAFFORD COUNTY, VIRGINIA

Department of Economic Development
1300 Courthouse Road
P.O. Box 339
Stafford, VA 22555
(540) 658-8681
(540) 658-6651 (fax)
www.co.stafford.va.us/econdev/ (Web)
economicdev@co.stafford.va.us (e-mail)

CITY OF TAKOMA PARK, MARYLAND

Economic and Community Development
7500 Maple Avenue
Takoma Park, MD 20912
(301) 270-1700 ext. 217
(301) 270-4568 (fax)
www.cityoftakomapark.org/ecd/ (Web)

STATE OF MARYLAND

Department of Business and Economic Development
217 E. Redwood Street
Baltimore, MD 21202
(410) 767-6300
(410) 333-6792 (fax)
www.choosemaryland.org (Web)

COMMONWEALTH OF VIRGINIA

Virginia Economic Development Partnership
8300 Boone Boulevard, Suite 450
Vienna, VA 22182
(703) 506-1032
(703) 506-1033 (fax)
www.exportvirginia.org (Web)
infonova@yesvirginia.org (e-mail)

THE GREATER WASHINGTON INITIATIVE

1725 Eye Street, N.W., Suite 200
Washington, DC 20036
(202) 857-5999
(202) 466-4980 (fax)
www.greaterwashington.org (Web)
greaterwashingtoninitiative@bot.org (e-mail)

METROPOLITAN WASHINGTON COUNCIL OF GOVERNMENTS

777 North Capitol Street, N.E., Suite 300
Washington, DC 20002-4239
(202) 962-3200
(202) 962-3201 (fax)
www.mwcog.org (Web)
infocntr@mwcog.org (e-mail)