

**Economic Trends in
Metropolitan Washington
1992 - 1996**

July 9, 1997

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



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TITLE: Economic Trends in Metropolitan Washington, 1992 - 1996

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Metropolitan Washington Council of Governments

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, 1992 - 1996

SUMMARY

Population - The region grew by more than 192,000 people between 1992 and 1996. The inner suburbs grew the most in terms of the absolute number of people, while the outer suburbs had the greatest percentage increase in population. The District of Columbia lost 55,200 people between 1992 and 1996. According to COG's Cooperative Forecasts, the number of people in the region will grow by more than 43 percent by the year 2020.

Employment - After dropping from 2.15 million jobs in 1991 to 2.14 million in 1992, the number of jobs in the region rose to 2.54 million in 1996. Losses of federal jobs slowed overall employment growth, while the services industries remained the core of the region's job market.

Federal Spending - The federal government spent nearly \$59.4 billion in the region in 1996, up from \$58.7 billion in 1995. The District of Columbia was home to almost \$23 billion of spending, Northern Virginia received \$21 billion, and suburban Maryland received \$16 billion.

Construction - Construction in the Washington increased significantly in the region during 1996. Developers broke ground on 19.8 million square feet of commercial projects -- an increase of just over 4 million from the 1995 total and the greatest amount of new space started in any year since 1990. Led by Fairfax County, local governments issued building permits for more than 26,600 new housing units, up somewhat from the 1995 figure.

New Home Sales, Mortgage Rates, and Housing Inflation - The number of new homes sold was almost 19,000, only 12 more than in 1995. After falling in 1995, mortgage rates rose slightly in 1996, from 7.3 percent to 7.8 percent in the first and fourth quarters. Housing inflation, as measured by the housing component of the Consumer Price Index for All Urban Consumers (CPI-U), increased slightly to 1.9 percent.

Inflation - Overall inflation in the Washington region also increased slightly to 2.8 percent in 1996, largely due to increases in the costs of educational and other personal services. The region's inflation rate in 1996 was just below the national rate of 3.0 percent.

Income - Total personal income in the Washington region grew by an average of 4.7 percent per year between 1990 and 1994, leading to a 1994 total of \$121.6 billion. On a per capita basis, 1994 income varied greatly by jurisdiction, with a regional average of \$29,966.

Retail Sales - Retail sales in the region increased in both nominal and real terms between 1992 and 1996. After slipping from \$43.7 billion in 1994 to \$43.2 billion in 1995, retail sales rose to \$44.0 billion in 1996 (all figures in 1996 dollars).

Airline Passengers - More than 41 million passengers flew into or out of the Washington region's three major airports in 1996, a 14.6 percent increase from 1992.

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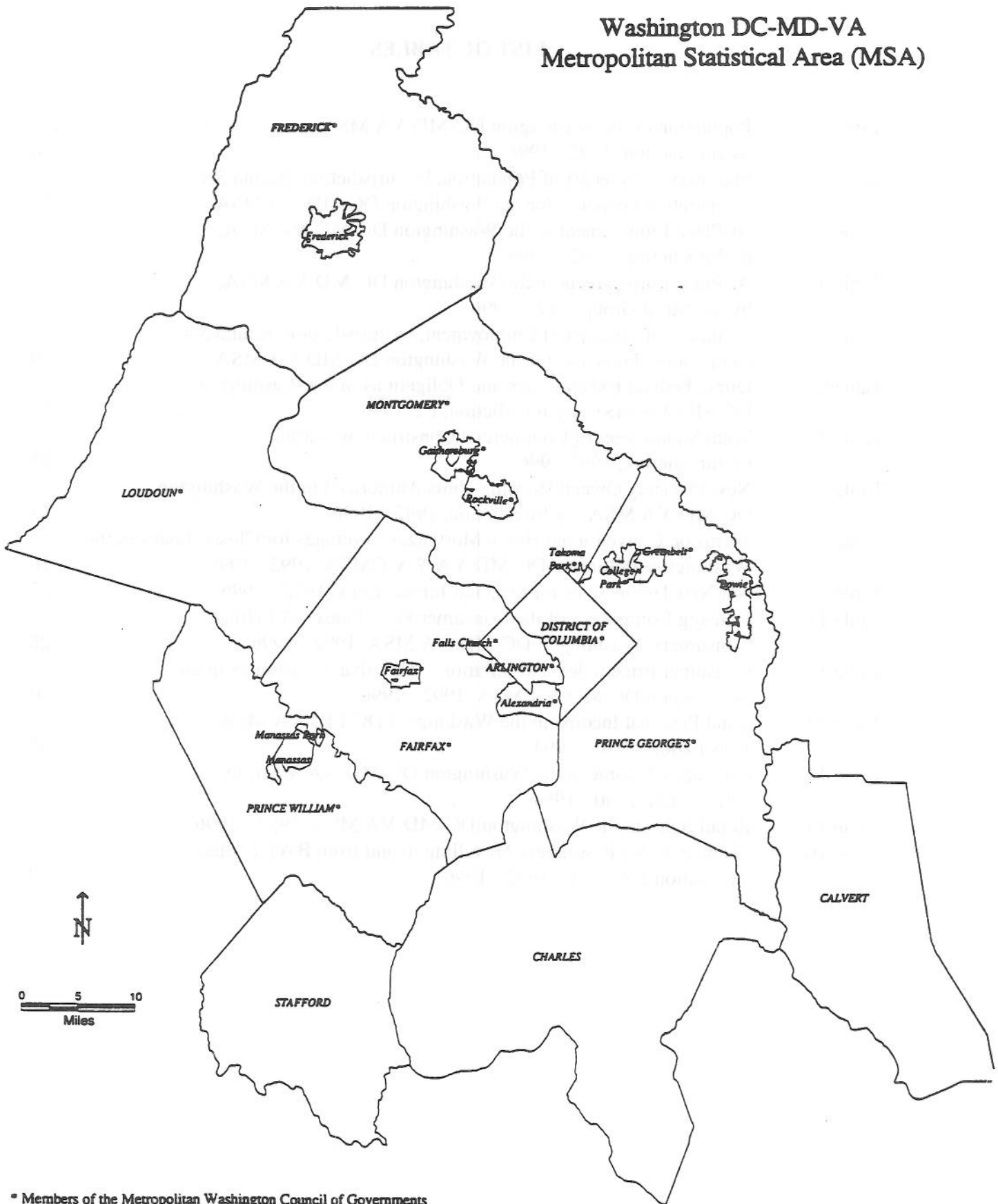
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Washington DC-MD-VA
Metropolitan Statistical Area (MSA)



* 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, 1992 - 1996

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 1992 and 1996, and is divided into sections covering population, employment, federal expenditures and obligations, construction, retail sales, mortgage rates and new 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, Frederick, Gaithersburg, Greenbelt, Rockville, and Takoma Park in Maryland; and Arlington County, Fairfax County, Loudoun County, Prince William County, and the Cities of Alexandria, Fairfax, and Falls Church 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)

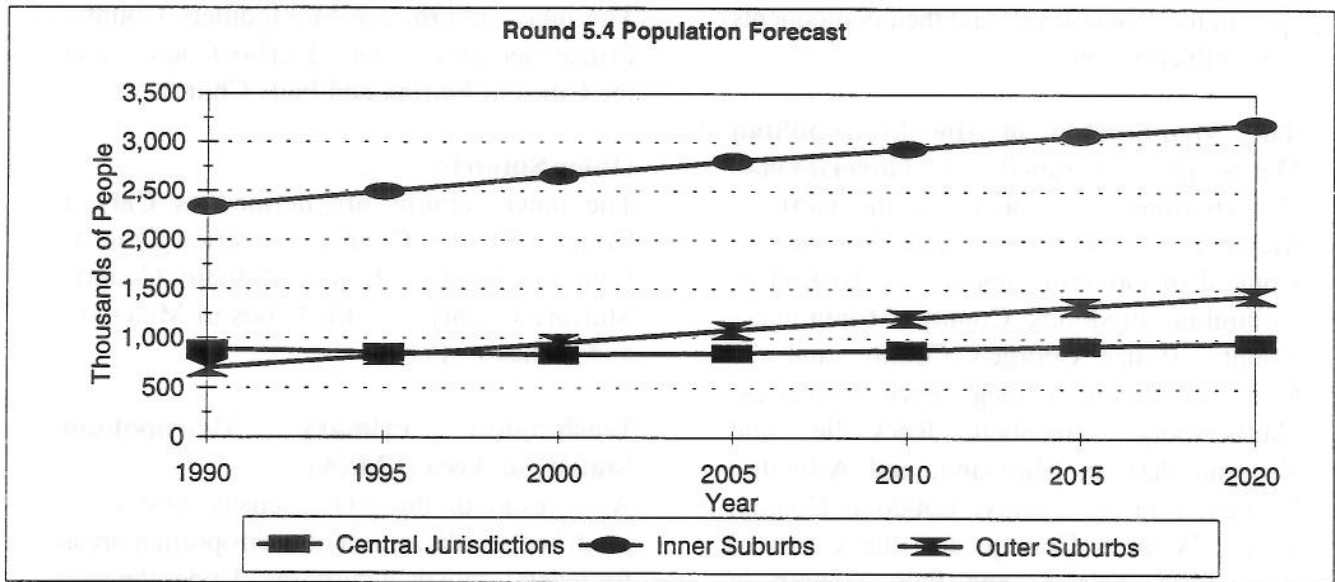
As a result of the 1990 Census, OMB has modified the definition of metropolitan areas for federal statistical purposes. Under the new definition, the Washington PMSA, the Baltimore PMSA, and the Hagerstown PMSA have been combined into a new Consolidated Metropolitan Statistical Area (CMSA). The individual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

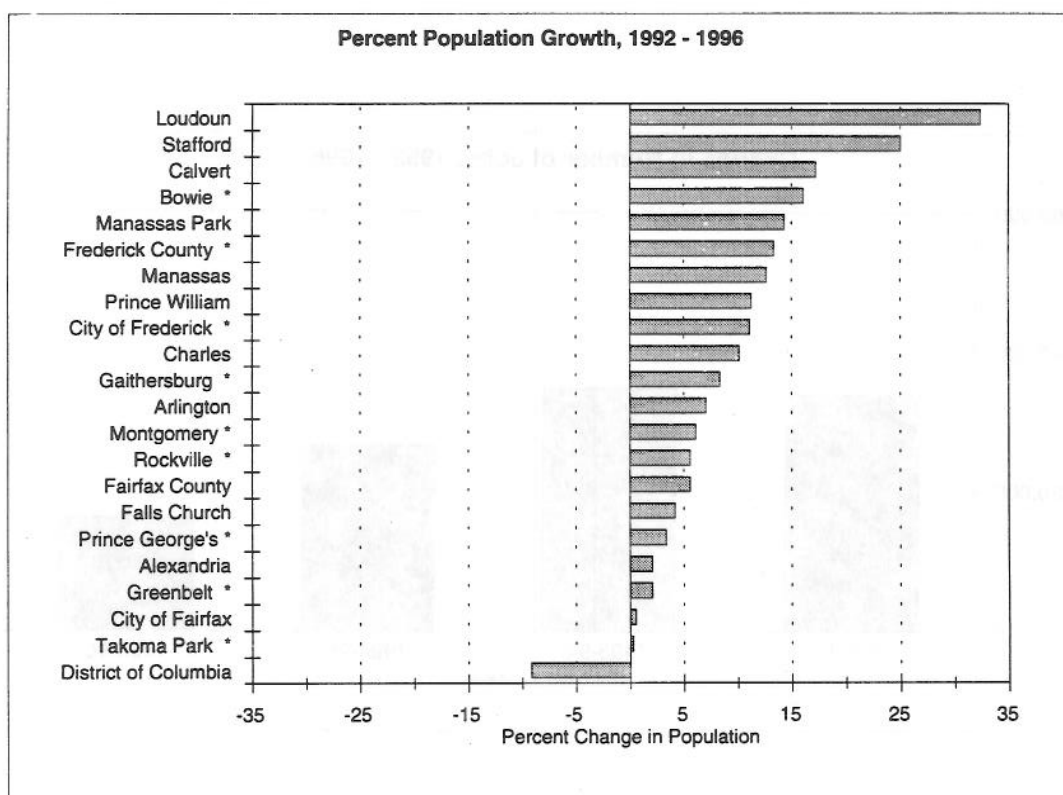
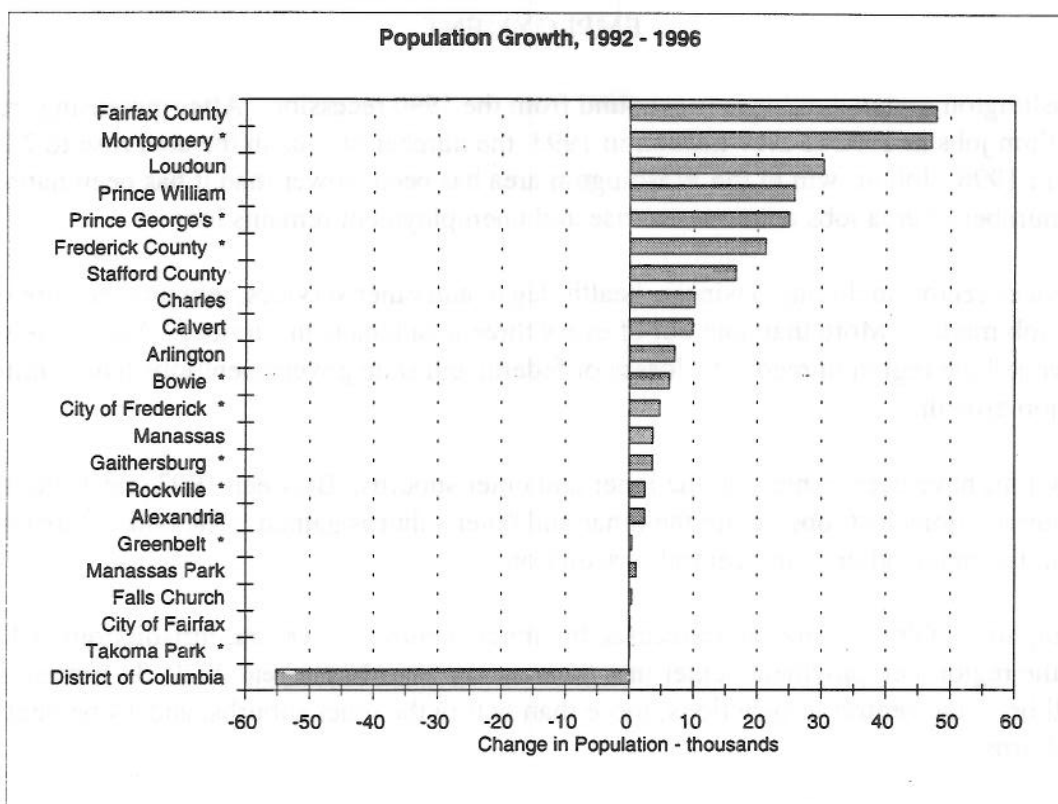
POPULATION

The region grew by more than 192,000 people between 1992 and 1996. The majority of this growth occurred in the region's inner suburbs, which increased by 5.0 percent or 120,000 people. The outer suburbs, with the addition of 118,000 people, grew by 15.9 percent. The region's central jurisdictions had a net loss of 45,900 people, or 5.1 percent, with population decline in the District offsetting increases in Arlington and Alexandria.

Despite the dramatic growth rate in the outer suburbs, the population remains anchored in the inner suburbs, where 60 percent of the region's population lives.

According to COG's Cooperative Forecasts, the inner suburbs will remain the most populous "ring" of the region well into the next century. COG forecasts that in the year 2020, the region will hold approximately 5.6 million people (43.1 percent more than the 1992 population). A full 57 percent of the 2020 population is expected to live in the inner suburbs.





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

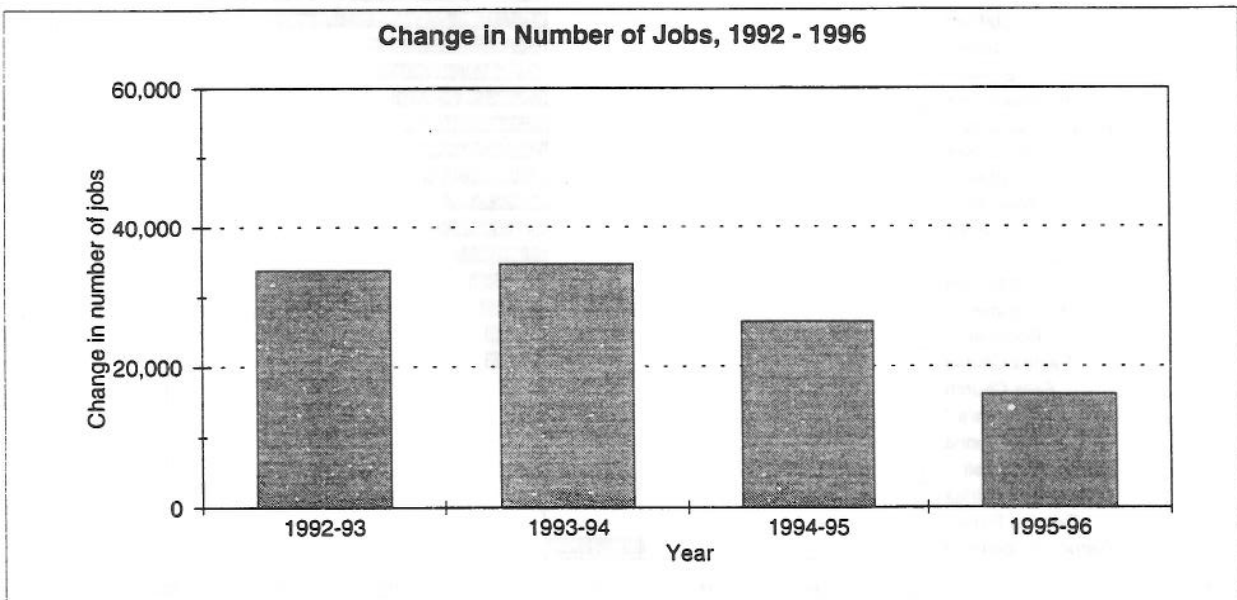
EMPLOYMENT

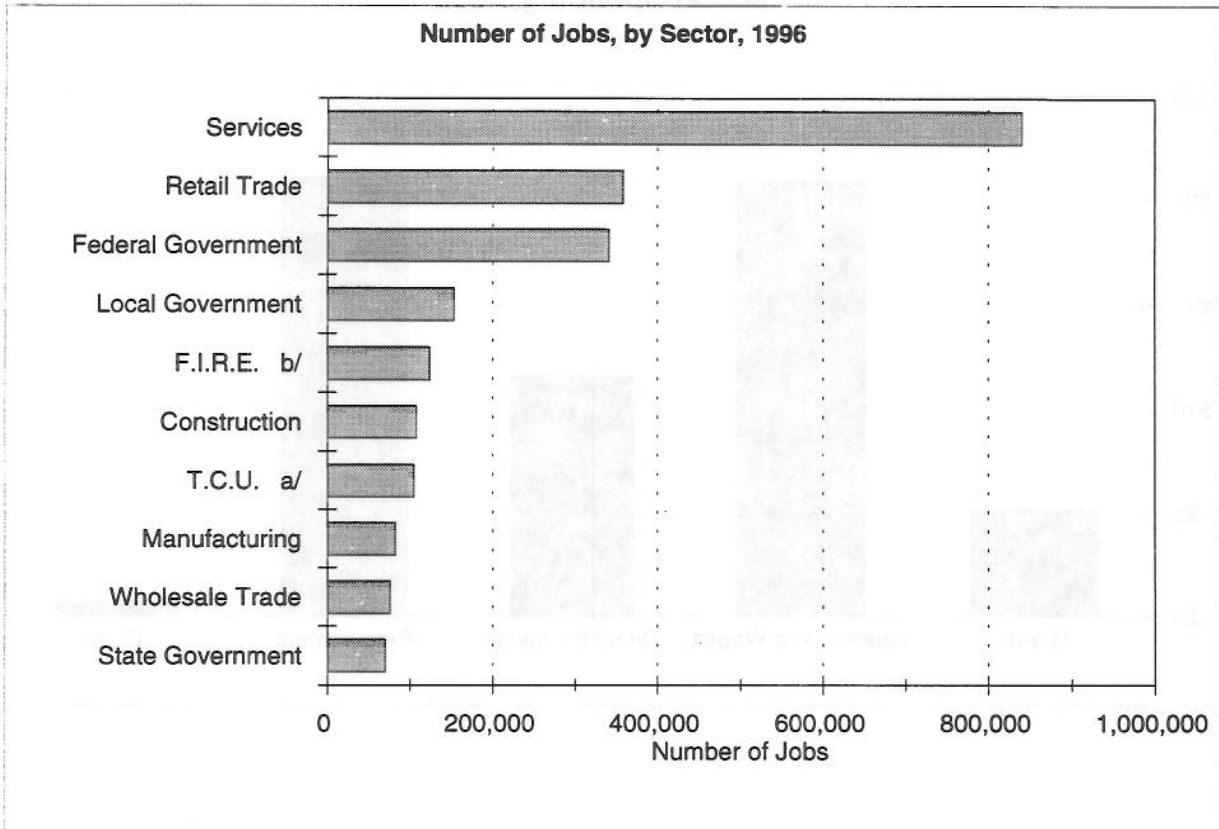
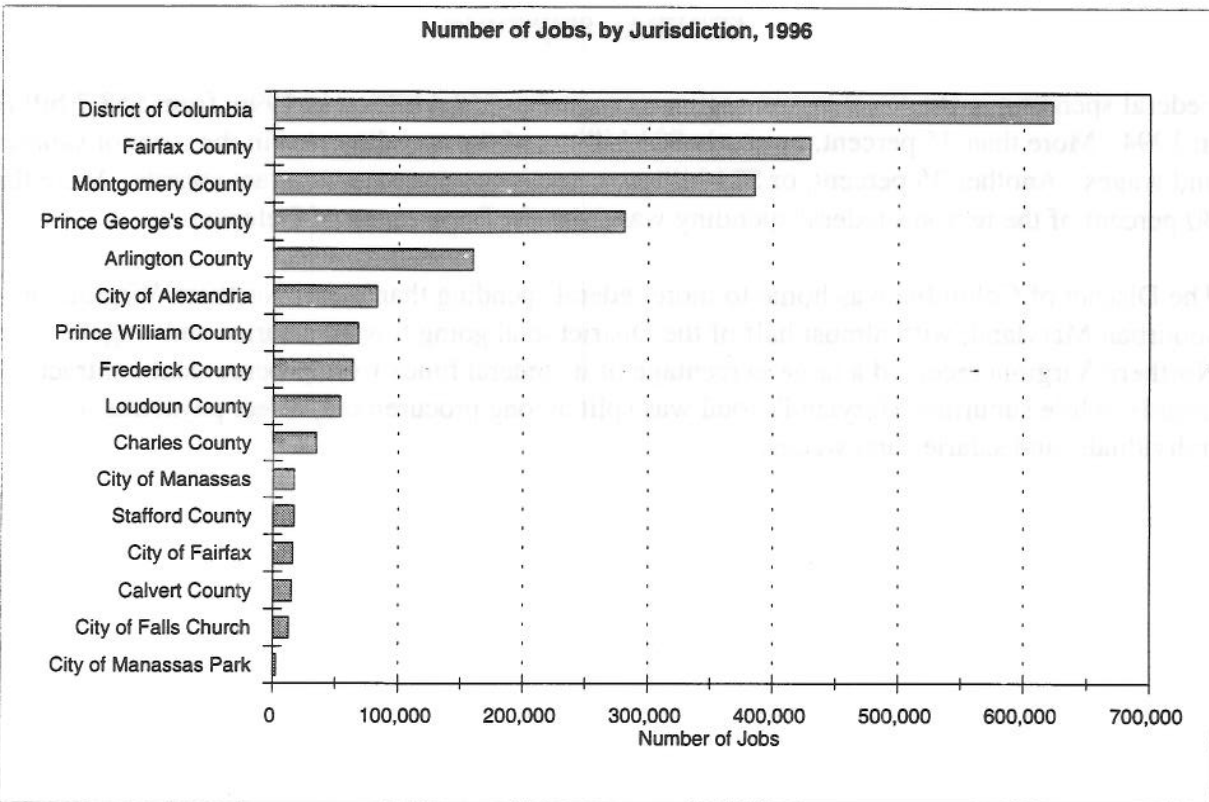
The Washington region continues to rebound from the 1990 recession. After increasing from 2.14 million jobs in 1992 to 2.17 million in 1993, the number of jobs in the area rose to 2.254 million in 1996. Job growth in the Washington area has been slower than it has been nationally, but the number of area jobs continues to rise and unemployment remains low.

The services sector, including business, health, legal, and other services, remains the core of the region's job market. More than one out of every three area jobs is in services. And while service jobs have led the region in recovery, losses of federal and state government jobs have limited overall job growth.

The new jobs have been coming to the inner and outer suburbs. Between 1992 and 1996, the central jurisdictions lost jobs, while the inner and outer suburbs gained. The bulk of area jobs remain in the inner suburbs and central jurisdictions.

According to COG's Cooperative Forecasts, the inner suburbs and central jurisdictions will remain the region's employment center into the next century. In the year 2020, 34 percent of all jobs will be in the central jurisdictions, more than half in the inner suburbs, and 14 percent in the outer suburbs.

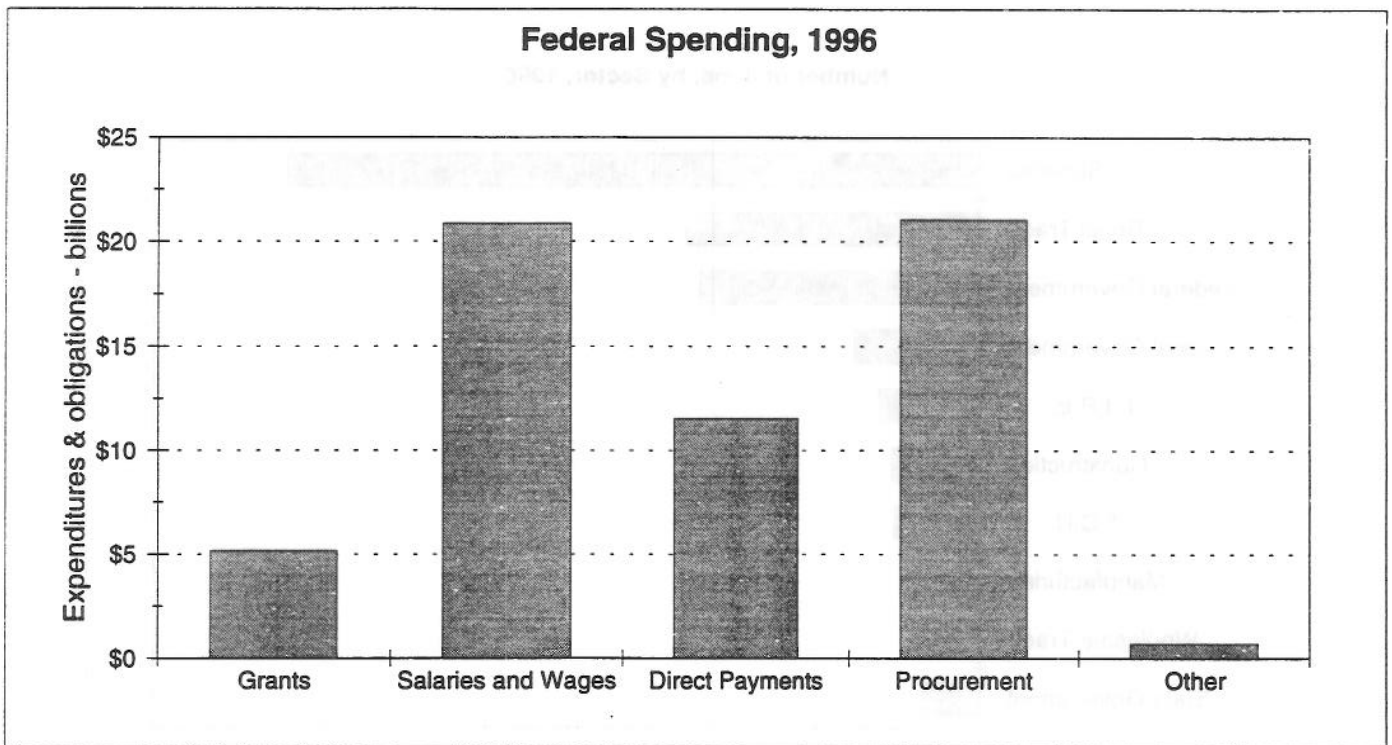




FEDERAL SPENDING

Federal spending in the Washington region increased to \$59.4 billion in 1996, from \$58.7 billion in 1994. More than 35 percent, or nearly \$21 billion, of the spending was in the form of salaries and wages. Another 35 percent, or \$21 billion, came in procurement contract awards. More than 30 percent of the region's federal spending was from the Department of Defense.

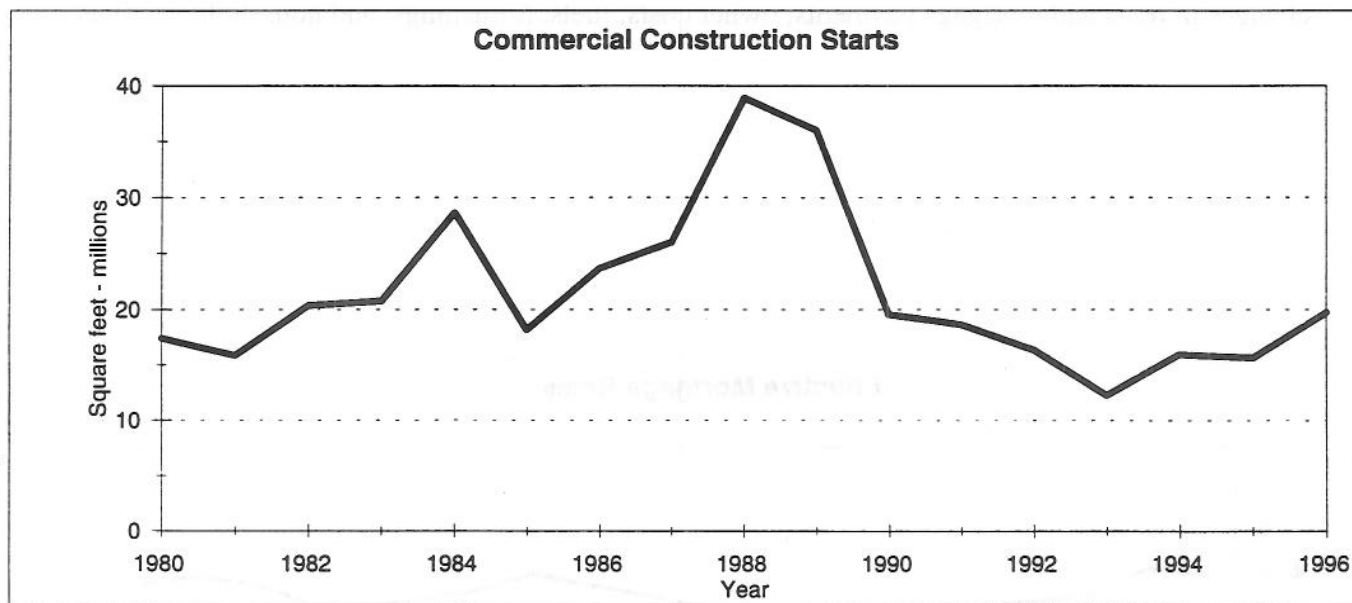
The District of Columbia was home to more federal spending than either Northern Virginia or suburban Maryland, with almost half of the District total going toward salaries and wages. Northern Virginia received a large percentage of its federal funds from procurement contract awards, while suburban Maryland's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



CONSTRUCTION

Construction in the metropolitan Washington region increased significantly during 1996, with developers breaking ground on more than 19.7 million square feet of commercial space. This was the greatest amount of new commercial development started in the region in any year since 1989. Prince George's County saw the most new commercial construction with nearly 4.8 million square feet.

The number of new privately owned housing units authorized in the region increased from 25,922 in 1995 to 26,631 in 1996. Of the permits that were issued in 1996, more than half were in the inner suburbs.



NEW HOME SALES, MORTGAGE RATES,
AND HOUSING INFLATION

Mortgage Rates

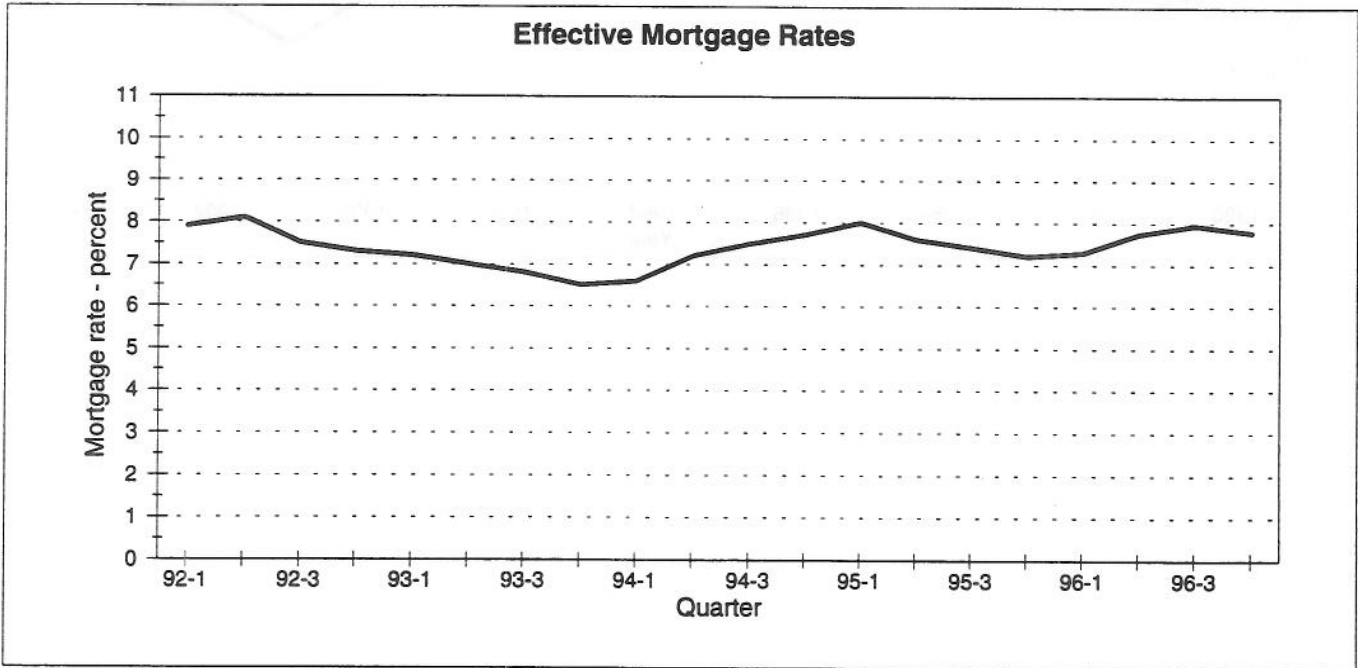
After falling in 1995, mortgage rates rose slightly in 1996, from 7.3 percent to 7.8 percent.

New Homes Sold

The number of new homes sold in the region remained fairly constant, increasing from 18,836 in 1995 to 18,848 in 1996. However, only Loudoun, Montgomery, Frederick and Prince William counties saw increases in the number of new homes sold.

Housing-related Inflation

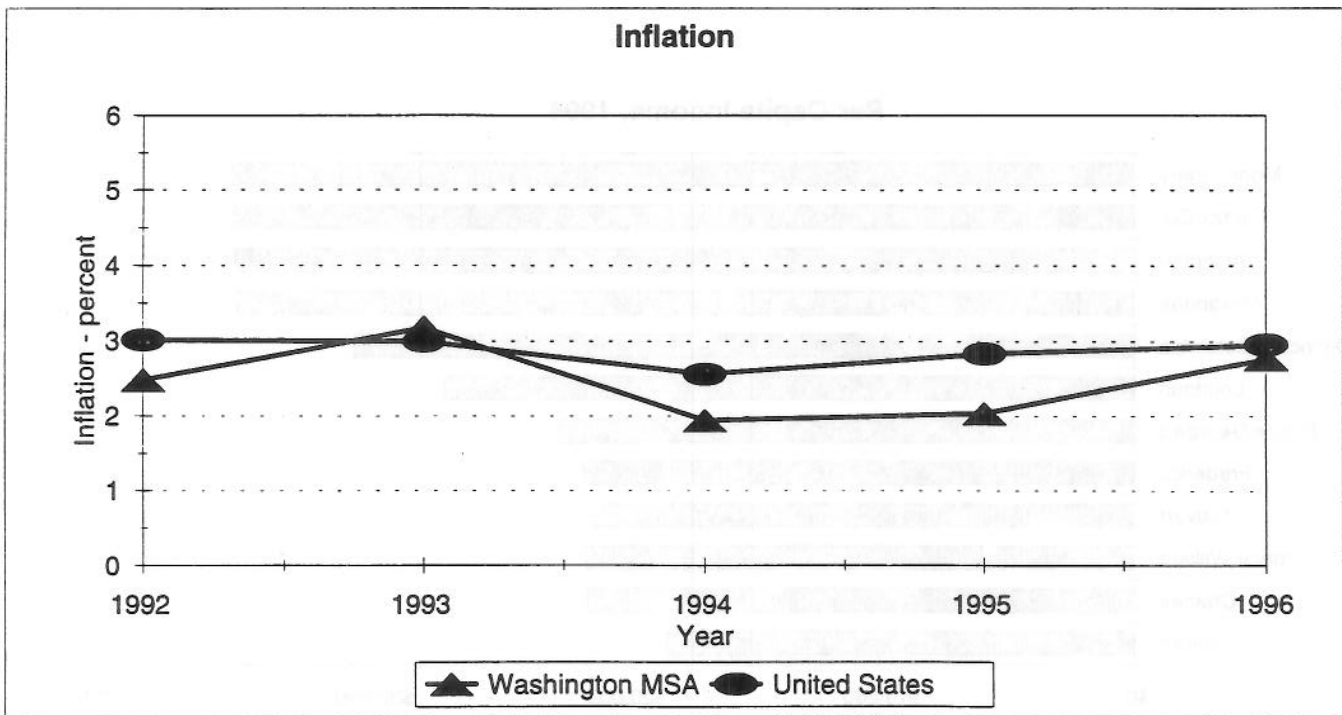
Housing-related inflation in the region increased slightly to 1.9 percent in 1996 from 1.5 percent in 1995. Nationally, housing inflation was 2.9 percent in 1996. This measure accounts for price changes in rents and mortgage payments, owner costs, fuels, furnishings, and household supplies.



INFLATION

The national Consumer Price Index for All Urban Consumers (CPI-U) increased by only 3.0 percent between 1995 and 1996. Regionally, there was only a 2.8 percent increase. Behind the regional inflation rate were the following topical changes:

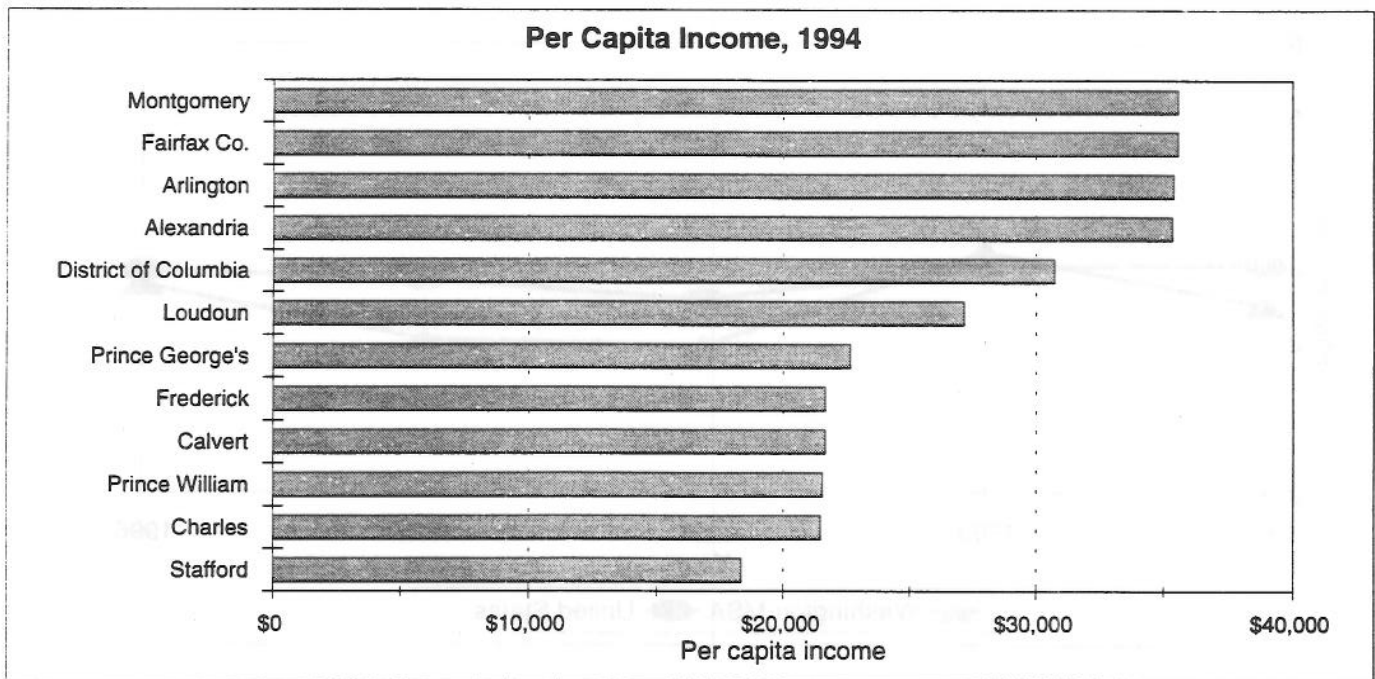
Entertainment	3.7 %
Medical care	4.1 %
Other goods and services	6.0 %
Transportation	3.1 %
Food and beverages	3.6 %
Housing	1.9 %
Apparel and upkeep	-0.4 %



INCOME

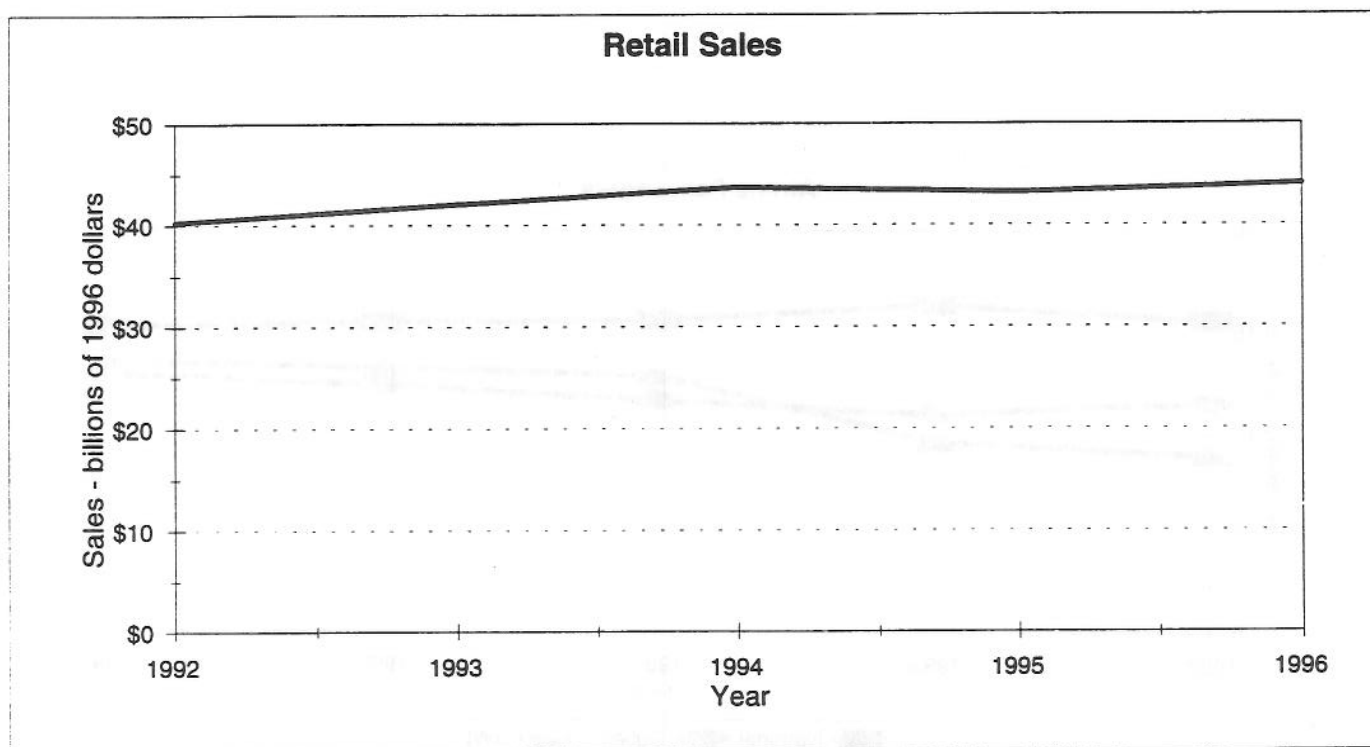
Total personal income in the Washington region grew by an average annual rate of 4.7 percent between 1990 and 1994, leading to a 1994 total of \$121 billion. Total income growth was fastest in the outer suburbs, which increased by an average of 6.1 percent per year.

On a per capita basis, income varied greatly by jurisdiction. Montgomery County, Arlington County, and the City of Alexandria topped the region in per capita income, all with incomes of approximately \$35,000 per person. Stafford County had the lowest per capita income at \$18,353. The per capita income for the region was \$29,966 in 1994.



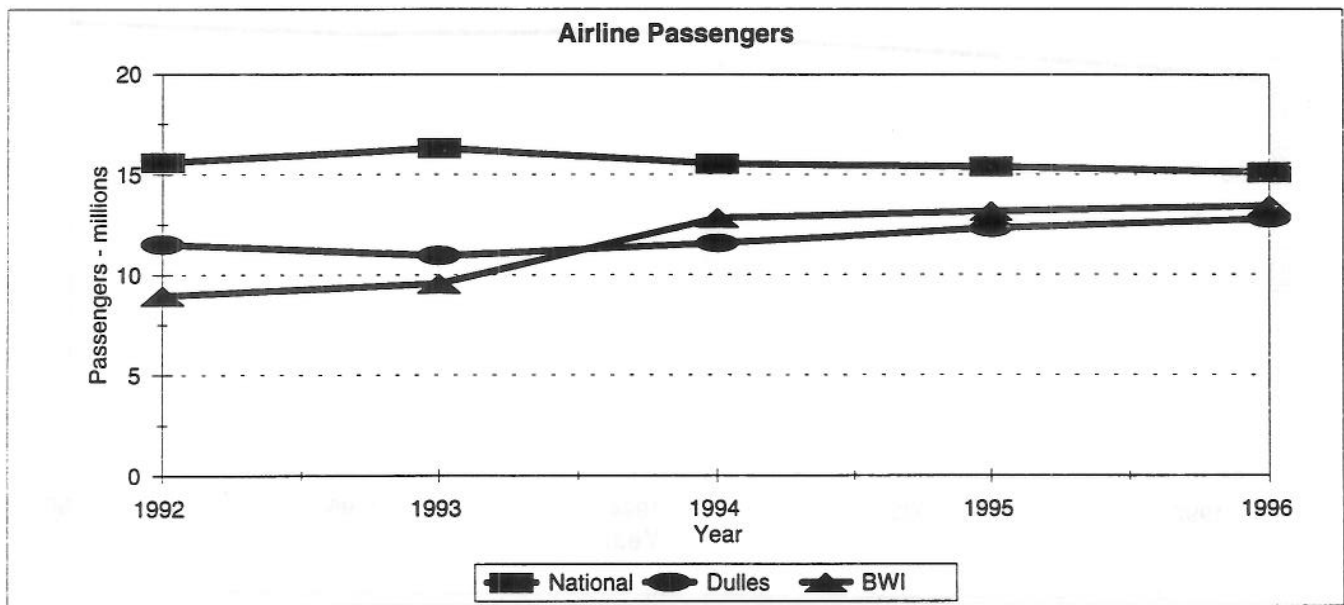
RETAIL SALES

Retail sales in the region increased in both nominal and real terms between 1992 and 1996. After slipping from \$43.7 billion in 1994 to \$43.2 billion in 1995, local retail sales rose to \$44.0 billion in 1996 (all figures in 1996 dollars). National retail sales also rose again in 1996 after declining (in real terms) between 1994 and 1995.



AIRLINE PASSENGERS

More than 41 million passengers flew into or out of the Washington region's three major airports in 1996, a 14.6 percent increase from 1992. Washington National, with 15.1 million passengers, led the three airports. Baltimore-Washington International served 13.4 million and Dulles served 12.8 million passengers.



Detailed Data by Jurisdiction: Economic Trends in Metropolitan Washington, 1992 - 1996

POPULATION¹

The region grew by more than 192,000 people between 1992 and 1996. The majority of this growth occurred in the region's inner suburbs, which increased by 5.0 percent or 120,000 people. The outer suburbs, with the addition of 118,000 people, grew by 15.9 percent. The region's central jurisdictions had a net loss of 45,900 people, or 5.1 percent, with population decline in the District offsetting increases in Arlington and Alexandria.

Despite the dramatic growth rate in the outer suburbs, the population remains anchored in the inner suburbs, where 60 percent of the region's population lives.

According to COG's Cooperative Forecasts, the inner suburbs will remain the most populous "ring" of the region well into the next century. COG forecasts that in the year 2020, the region will hold approximately 5.6 million people (43.1 percent more than the 1992 population). A full 57 percent of the 2020 population is expected to live in the inner suburbs.

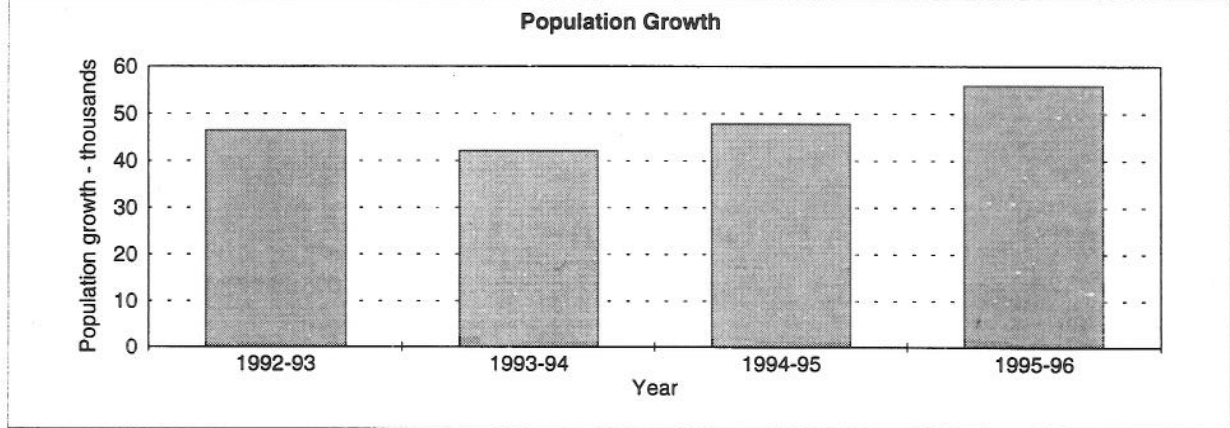
¹ Narrative in this section is the same as in the Overview section.

Region Grew by 192,000 People Between 1992 and 1996

Table 1. Population of the Washington DC-MD-VA MSA, by Jurisdiction, 1992 - 1996

(Thousands of people)

JURISDICTIONS	1992	1993	1994	1995	1996	Change 1992 - 1996	
						Number	Percent
District of Columbia	598.4	593.6	567.1	554.3	543.2	-55.2	-9.2
Calvert County	57.0	60.0	62.2	64.6	66.8	9.8	17.2
Charles County	103.5	110.0	110.6	111.3	113.6	10.1	9.7
Frederick County *	159.6	162.8	172.6	174.2	180.8	21.2	13.3
City of Frederick *	42.8	43.8	45.2	46.2	47.5	4.7	11.1
Montgomery County *	772.0	777.7	798.0	810.0	819.0	47.0	6.1
City of Gaithersburg *	43.7	44.7	45.8	46.2	47.3	3.6	8.3
City of Rockville *	45.0	45.0	47.1	47.2	47.5	2.5	5.6
City of Takoma Park * a/	17.5	17.4	16.9	17.5	17.5	0.0	0.2
Prince George's County *	749.0	752.8	764.1	767.4	773.8	24.8	3.3
City of Bowie *	39.2	40.2	43.2	44.9	45.5	6.3	16.0
City of College Park *	22.2	21.9	21.3	21.3	23.7	1.5	6.8
City of Greenbelt *	20.3	20.3	20.6	20.6	20.7	0.4	2.0
Maryland Suburbs	1,841.1	1,863.3	1,907.5	1,927.5	1,953.9	112.8	6.1
Arlington County	178.5	180.1	183.4	184.0	185.5	7.0	3.9
City of Alexandria	115.0	116.0	116.4	117.0	117.3	2.3	2.0
Fairfax County	851.9	865.0	863.1	879.4	899.7	47.8	5.6
City of Fairfax	19.9	20.0	20.0	20.0	20.0	0.1	0.5
City of Falls Church	9.6	9.8	9.8	10.0	10.0	0.4	4.2
Loudoun County	93.5	97.7	103.5	112.5	123.8	30.3	32.4
Prince William County	227.9	235.8	243.6	250.0	253.5	25.6	11.2
City of Manassas	29.5	30.2	30.9	31.7	33.2	3.7	12.6
City of Manassas Park	7.0	7.1	7.3	8.0	8.0	1.0	14.3
Stafford County	66.0	66.1	74.2	80.3	82.5	16.5	25.0
Virginia Suburbs	1,598.8	1,627.8	1,652.2	1,692.9	1,733.4	134.6	8.4
MSA. Total	4,038.3	4,084.7	4,126.8	4,174.7	4,230.5	192.2	4.8
Central Jurisdictions	891.9	889.7	866.9	855.3	846.0	-45.9	-5.1
Inner Suburbs	2,402.4	2,425.3	2,455.0	2,486.8	2,522.5	120.0	5.0
Outer Suburbs	744.0	769.7	804.9	832.6	862.1	118.1	15.9



Source: Local government estimates.

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

a/ Figure includes portions in both Prince George's and Montgomery counties.

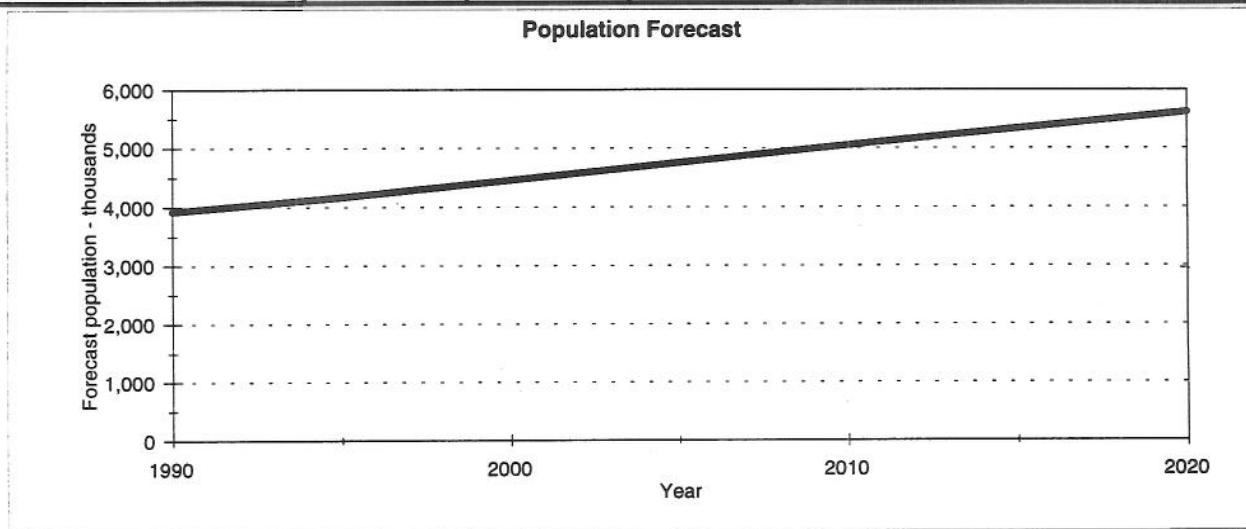
Population Growth Forecast to be Fastest in Suburbs

Table 2. Summary of Forecast of Population, by Jurisdiction
Round 5.4 Cooperative Forecasts for the Washington DC-MD-VA MSA

(Thousands of people)

JURISDICTIONS	1990	Forecast			Change 1990 - 2020	
		2000	2010	2020	Number	Percent
District of Columbia	606.9	523.3	560.3	624.8	17.9	2.9
Calvert County	51.4	75.0	95.0	122.5	71.1	138.3
Charles County	101.2	123.2	150.1	182.9	81.7	80.7
Frederick County	150.2	203.2	243.6	267.1	116.9	77.8
Montgomery County	757.0	855.0	945.0	1,000.0	243.0	32.1
City of Rockville a/	44.8	51.8	59.1	60.0	15.2	33.9
Prince George's County	729.3	812.1	888.7	967.4	238.1	32.6
Maryland Suburbs	1,789.0	2,068.5	2,322.4	2,539.9	750.9	42.0
Arlington County	170.9	191.0	201.1	207.5	36.6	21.4
City of Alexandria	111.2	120.0	127.0	132.0	20.8	18.7
Fairfax County	818.6	954.3	1,069.9	1,206.3	387.7	47.4
City of Fairfax b/	19.6	21.3	22.8	22.8	3.2	16.3
City of Falls Church	9.6	10.4	10.7	10.9	1.3	13.5
Loudoun County	86.1	145.9	212.6	285.9	199.8	232.1
Prince William County	215.7	280.3	367.2	428.6	212.9	98.7
Independent Cities	34.7	45.1	47.4	50.0	15.3	44.1
Stafford County c/	61.2	76.8	92.4	105.6	44.4	72.5
Virginia Suburbs	1,527.6	1,845.1	2,151.1	2,449.6	922.0	60.4
MSA Total	3,923.5	4,436.9	5,033.8	5,614.3	1,690.8	43.1
Central Jurisdictions	889.0	834.3	888.4	964.3	75.3	8.5
Inner Suburbs	2,334.1	2,653.1	2,937.1	3,194.6	860.5	36.9
Outer Suburbs	700.5	949.5	1,208.3	1,442.6	742.1	105.9

Population Forecast



Source: COG, Round 5.4 Cooperative Forecasts.

a/ Included in Montgomery County total.

b/ Includes Fairfax County group quarters in the Massey Complex, located within the boundaries of the City of Fairfax.

c/ Source: "COG/TPB Models Development Program: Land Activity Forecasts of Jurisdictions Added in the Cordon Expansion." COG/TPB, December 1994.

EMPLOYMENT

The Washington region continues to rebound from the 1990 recession. After increasing from 2.14 million jobs in 1992 to 2.17 million in 1993, the number of jobs in the area rose to 2.254 million in 1996. Job growth in the Washington area has been slower than it has been nationally, but the number of area jobs continues to rise and unemployment remains low.

The services sector, including business, health, legal, and other services, remains the core of the region's job market. More than one out of every three area jobs is in services. And while service jobs have led the region-in recovery, losses of federal and state government jobs have limited overall job growth.

The new jobs have been coming to the inner and outer suburbs. Between 1992 and 1996, the central jurisdictions lost jobs, while the inner and outer suburbs gained. The bulk of area jobs remain in the inner suburbs and central jurisdictions.

According to COG's Cooperative Forecasts, the inner suburbs and central jurisdictions will remain the region's employment center into the next century. In the year 2020, 34 percent of all jobs will be in the central jurisdictions, more than half in the inner suburbs, and 14 percent in the outer suburbs.

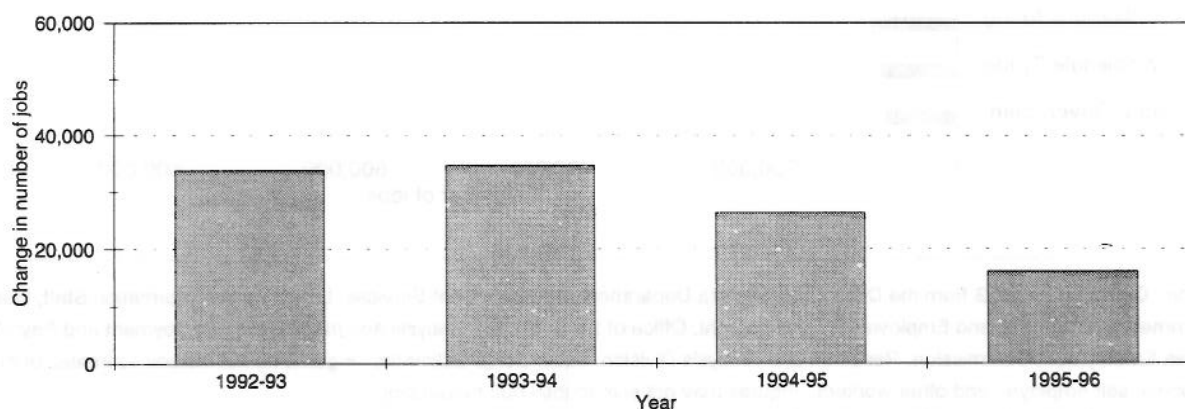
Outer Suburbs Experienced Fastest Job Growth in 1996

Table 3. At-place Employment in the Washington DC-MD-VA MSA, by Jurisdiction, 1992-1996

(Nonagricultural wage and salary jobs - annual average)

JURISDICTIONS	1992	1993	1994	1995	1996 /1	Percent Change 1995-1996
District of Columbia	673,310	670,300	658,700	643,300	623,000	-3.2
Calvert County	12,039	12,668	12,939	13,912	14,465	4.0
Charles County	28,991	30,339	31,587	33,010	33,741	2.2
Frederick County	52,629	55,122	58,235	60,201	62,857	4.4
Montgomery County	365,451	369,125	376,871	381,454	384,171	0.7
Prince George's County	262,643	267,544	271,294	276,519	280,268	1.4
Maryland Suburbs	721,753	734,798	750,926	765,096	775,502	1.4
Arlington County	148,320	150,206	151,018	155,704	159,793	2.6
City of Alexandria	77,535	79,246	80,375	81,695	82,547	1.0
Fairfax County	370,732	382,393	401,043	414,952	428,806	3.3
City of Fairfax	16,484	16,197	16,895	16,155	15,742	-2.6
City of Falls Church	12,727	12,901	12,460	12,564	12,106	-3.6
Loudoun County	38,750	42,067	45,760	49,907	53,906	8.0
Prince William County	54,149	58,529	62,769	64,820	67,504	4.1
City of Manassas	17,276	16,623	16,598	16,790	16,971	1.1
City of Manassas Park	1,370	1,583	1,632	1,994	2,146	7.6
Stafford County	11,480	12,859	14,207	15,819	16,882	6.7
Virginia Suburbs	748,823	772,604	802,757	830,400	856,403	3.1
MSA Total	2,143,886	2,177,702	2,212,383	2,238,796	2,254,905	0.7
Central Jurisdictions	899,165	899,752	890,093	880,699	865,340	-1.7
Inner Suburbs	1,028,037	1,048,160	1,078,563	1,101,644	1,121,093	1.8
Outer Suburbs	216,684	229,790	243,727	256,453	268,472	4.7

Change in Number of Jobs



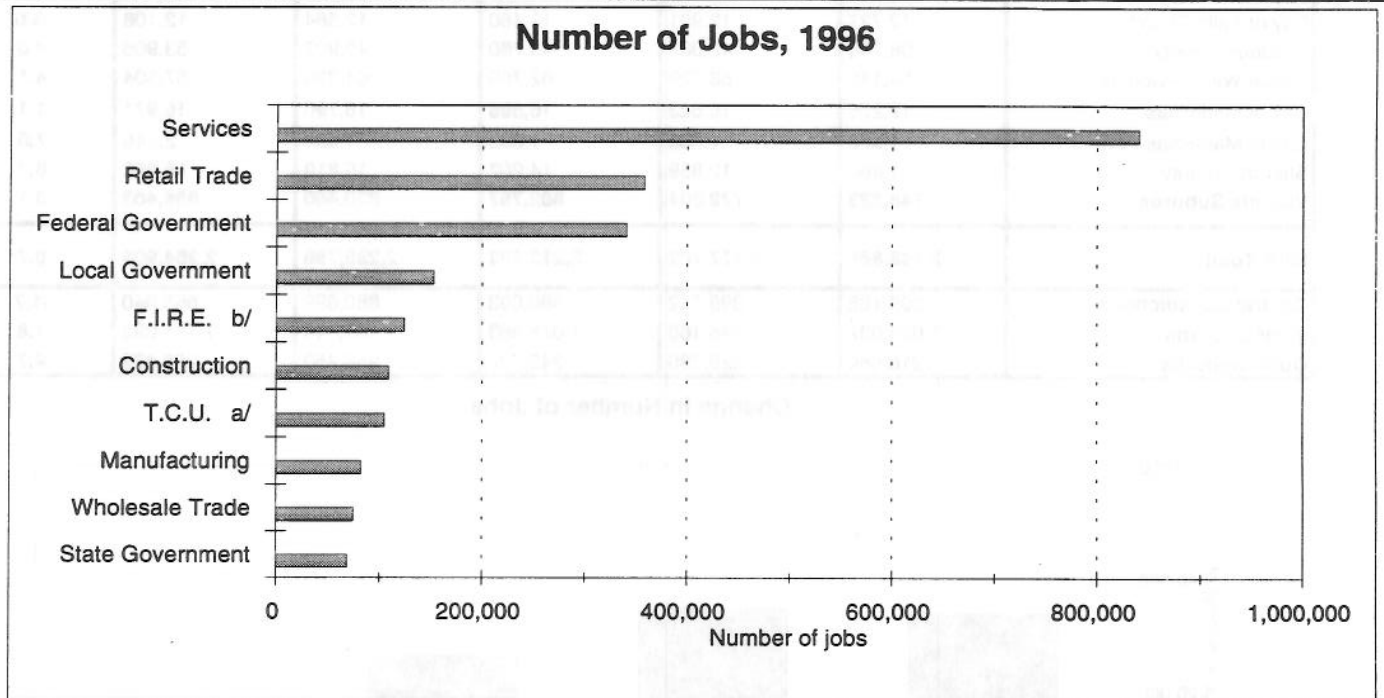
Source: Compiled by COG from the District of Columbia Department of Employment Services, Labor Market Information Staff; Maryland Department of Economic and Employment Development, Office of Labor Market Analysis and Information, Employment and Payrolls Reports; Virginia Employment Commission, Research and Analysis Division, Labor Force Estimates. Figures do not include estimates of military personnel, self-employed and other workers. Figures may not sum to total due to rounding.
/1 1996 figures for Maryland and Virginia jurisdictions are estimates based on the first three quarters.

Services Employment Grew, Federal Government Shrank in 1996

Table 4. At-place Employment in the Washington DC-MD-VA MSA, by Industrial Group, 1992-1996

(Nonagricultural wage and salary jobs - annual average)

INDUSTRY SECTOR	1992	1993	1994	1995	1996*	Percent Change 1995-1996
Manufacturing	79,099	79,239	80,831	80,277	81,888	2.0
Construction	95,332	97,450	103,910	105,716	108,048	2.2
T.C.U. a/	103,560	102,676	103,547	104,826	104,515	-0.3
Wholesale Trade	69,859	69,105	71,707	75,438	75,028	-0.5
Retail Trade	336,005	338,041	348,137	357,170	357,992	0.2
F.I.R.E. b/	125,581	127,655	133,096	127,549	124,275	-2.6
Services	737,142	762,779	783,470	814,795	840,032	3.1
Federal Government	379,208	379,736	365,644	351,016	341,136	-2.8
Local Government	141,330	142,968	145,924	150,139	152,731	1.7
State Government	76,770	78,053	76,117	71,870	69,260	-3.6
Total	2,143,886	2,177,702	2,212,383	2,238,796	2,254,905	0.7



Source: Compiled by COG from the District of Columbia Department of Employment Services, Labor Market Information Staff; Maryland Department of Economic and Employment Development, Office of Labor Market Analysis and Information, Employment and Payrolls Reports; Virginia Employment Commission, Research and Analysis Division, Labor Force Estimates. Figures do not include estimates of military personnel, self-employed and other workers. Figures may not sum to total due to rounding.

* 1996 figures for Maryland and Virginia jurisdictions are estimates based on the first three quarters.

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

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

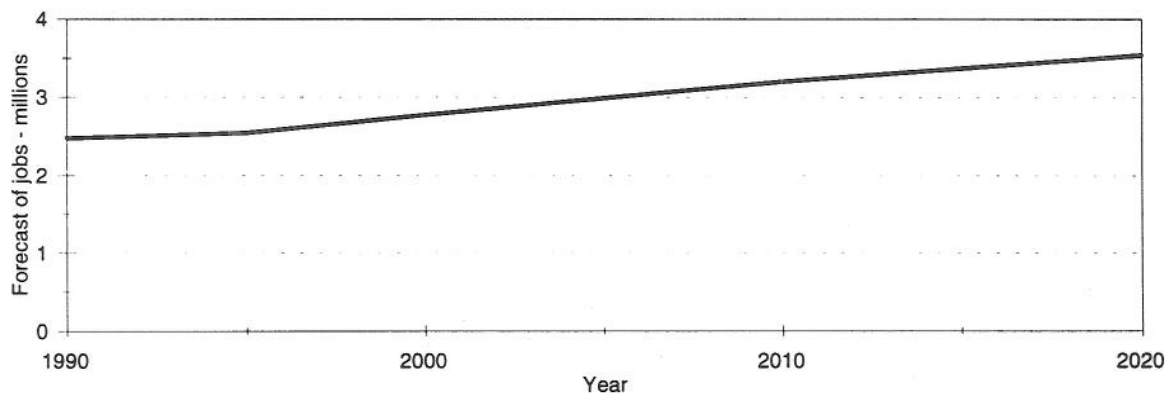
Number of Jobs in Region Forecast to Increase by 43 Percent

Table 5. Summary of Forecast of Employment, by Jurisdiction
Round 5.4 Cooperative Forecasts for the Washington DC-MD-VA MSA

(Thousands of Jobs)

JURISDICTIONS	1990				Change 1990 - 2020	
		2000	2010	2020	Number	Percent
District of Columbia	747.3	719.3	759.4	806.3	59.0	7.9
Calvert County	14.7	19.1	21.5	24.0	9.3	63.3
Charles County	38.7	43.4	52.5	60.1	21.4	55.3
Frederick County	54.0	82.0	106.0	116.0	62.0	114.8
Montgomery County	465.5	500.0	580.0	630.0	164.5	35.3
City of Rockville a/	56.9	73.0	83.0	86.6	29.7	52.2
Prince George's County	310.4	353.0	419.6	476.2	165.8	53.4
Maryland Suburbs	883.3	997.5	1,179.6	1,306.3	423.0	47.9
Arlington County	183.1	234.3	264.6	281.0	97.9	53.5
City of Alexandria	92.2	94.3	102.8	110.7	18.5	20.1
Fairfax County	407.8	511.5	612.9	678.4	270.6	66.4
City of Fairfax b/	26.9	30.3	30.9	31.4	4.5	16.9
City of Falls Church	9.2	9.4	9.5	9.6	0.4	4.3
Loudoun County	39.3	59.8	82.7	112.6	73.3	186.5
Prince William County	65.8	87.6	120.2	161.3	95.5	145.1
Independent Cities	18.7	21.6	24.7	25.4	6.7	35.8
Stafford County c/	5.7	10.1	14.5	18.9	13.2	231.6
Virginia Suburbs	848.7	1,058.9	1,262.8	1,429.4	580.7	68.4
MSA Total	2,479.3	2,775.7	3,201.8	3,542.0	1,062.7	42.9
Central Jurisdictions	1,022.6	1,047.9	1,126.8	1,198.1	175.5	17.2
Inner Suburbs	1,219.7	1,404.2	1,652.8	1,825.7	606.0	49.7
Outer Suburbs	236.9	323.6	422.1	518.3	281.4	118.8

Employment Forecast



Source: COG, Round 5.4 Cooperative Forecasts. Includes forecasts of military, self-employed, mining and other jobs.

a/ Included in Montgomery County total.

b/ Totals for all years include Fairfax County government employees working in the Massey Complex, located within the City of Fairfax boundaries.

c/ Source: "COG/TPB Models Development Program: Land Activity Forecasts of Jurisdictions Added in the Cordon Expansion". COG/TPB, December 1994.

FEDERAL SPENDING

Federal spending in the Washington region increased to \$59.4 billion in 1996, from \$58.7 billion in 1994. More than 35 percent, or nearly \$21 billion, of the spending was in the form of salaries and wages. Another 35 percent, or \$21 billion, came in procurement contract awards. More than 30 percent of the region's federal spending was from the Department of Defense.

The District of Columbia was home to more federal spending than either Northern Virginia or suburban Maryland, with almost 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, direct payments to individuals, and salaries and wages.

Region	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030																																																																																									
Washington Region	58.7	59.4	60.1	60.8	61.5	62.2	62.9	63.6	64.3	65.0	65.7	66.4	67.1	67.8	68.5	69.2	69.9	70.6	71.3	72.0	72.7	73.4	74.1	74.8	75.5	76.2	76.9	77.6	78.3	79.0	79.7	80.4	81.1	81.8	82.5	83.2	83.9	84.6	85.3	86.0	86.7	87.4	88.1	88.8	89.5	90.2	90.9	91.6	92.3	93.0	93.7	94.4	95.1	95.8	96.5	97.2	97.9	98.6	99.3	100.0																																																																		
District of Columbia	15.2	15.5	15.8	16.1	16.4	16.7	17.0	17.3	17.6	17.9	18.2	18.5	18.8	19.1	19.4	19.7	20.0	20.3	20.6	20.9	21.2	21.5	21.8	22.1	22.4	22.7	23.0	23.3	23.6	23.9	24.2	24.5	24.8	25.1	25.4	25.7	26.0	26.3	26.6	26.9	27.2	27.5	27.8	28.1	28.4	28.7	29.0	29.3	29.6	29.9	30.2	30.5	30.8	31.1	31.4	31.7	32.0	32.3	32.6	32.9	33.2	33.5	33.8	34.1	34.4	34.7	35.0	35.3	35.6	35.9	36.2	36.5	36.8	37.1	37.4	37.7	38.0	38.3	38.6	38.9	39.2	39.5	39.8	40.1	40.4	40.7	41.0	41.3	41.6	41.9	42.2	42.5	42.8	43.1	43.4	43.7	44.0	44.3	44.6	44.9	45.2	45.5	45.8	46.1	46.4	46.7	47.0	47.3	47.6	47.9	48.2	48.5	48.8	49.1	49.4	49.7	50.0									
Northern Virginia	12.5	12.8	13.1	13.4	13.7	14.0	14.3	14.6	14.9	15.2	15.5	15.8	16.1	16.4	16.7	17.0	17.3	17.6	17.9	18.2	18.5	18.8	19.1	19.4	19.7	20.0	20.3	20.6	20.9	21.2	21.5	21.8	22.1	22.4	22.7	23.0	23.3	23.6	23.9	24.2	24.5	24.8	25.1	25.4	25.7	26.0	26.3	26.6	26.9	27.2	27.5	27.8	28.1	28.4	28.7	29.0	29.3	29.6	29.9	30.2	30.5	30.8	31.1	31.4	31.7	32.0	32.3	32.6	32.9	33.2	33.5	33.8	34.1	34.4	34.7	35.0	35.3	35.6	35.9	36.2	36.5	36.8	37.1	37.4	37.7	38.0	38.3	38.6	38.9	39.2	39.5	39.8	40.1	40.4	40.7	41.0	41.3	41.6	41.9	42.2	42.5	42.8	43.1	43.4	43.7	44.0	44.3	44.6	44.9	45.2	45.5	45.8	46.1	46.4	46.7	47.0	47.3	47.6	47.9	48.2	48.5	48.8	49.1	49.4	49.7	50.0
Suburban Maryland	10.0	10.2	10.4	10.6	10.8	11.0	11.2	11.4	11.6	11.8	12.0	12.2	12.4	12.6	12.8	13.0	13.2	13.4	13.6	13.8	14.0	14.2	14.4	14.6	14.8	15.0	15.2	15.4	15.6	15.8	16.0	16.2	16.4	16.6	16.8	17.0	17.2	17.4	17.6	17.8	18.0	18.2	18.4	18.6	18.8	19.0	19.2	19.4	19.6	19.8	20.0	20.2	20.4	20.6	20.8	21.0	21.2	21.4	21.6	21.8	22.0	22.2	22.4	22.6	22.8	23.0	23.2	23.4	23.6	23.8	24.0	24.2	24.4	24.6	24.8	25.0	25.2	25.4	25.6	25.8	26.0	26.2	26.4	26.6	26.8	27.0	27.2	27.4	27.6	27.8	28.0	28.2	28.4	28.6	28.8	29.0	29.2	29.4	29.6	29.8	30.0																									

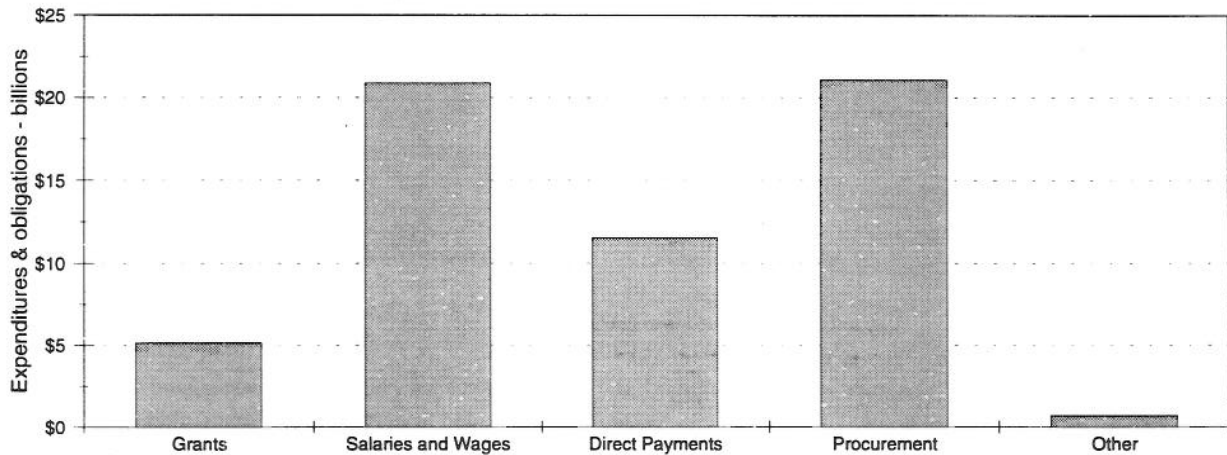
\$59.4 Billion of Federal Spending in the Region in 1996

**Table 6. Direct Federal Expenditures and Obligations
in the Washington DC-MD-VA MSA, by Jurisdiction, FY1996**

(Thousands of Dollars)

JURISDICTIONS	Grant Awards	Salaries and Wages	Direct Payments for Individuals	Procurement Contract Awards	Other	Total	1996 Total	
							Department of Defense	Non-Defense
District of Columbia	3,408,183	11,304,118	2,728,453	4,579,905	657,464	22,678,123	2,491,501	20,186,622
Calvert County	17,431	6,131	154,050	16,423	416	194,451	19,692	174,759
Charles County	36,655	148,082	276,169	70,924	740	532,570	227,490	305,080
Frederick County	79,639	128,797	358,064	71,934	2,501	640,935	153,774	487,161
Montgomery County	560,437	2,570,398	2,134,399	3,149,883	7,613	8,422,730	2,029,468	6,393,262
Prince George's County	406,526	1,469,136	1,916,304	2,156,232	9,244	5,957,442	1,259,688	4,697,754
Maryland Suburbs	1,100,688	4,322,544	4,838,986	5,465,396	20,514	15,748,128	3,690,112	12,058,016
Arlington County	136,923	2,954,753	534,163	1,995,203	3,476	5,624,518	3,556,669	2,067,849
City of Alexandria	73,294	589,035	522,190	1,039,566	4,091	2,228,176	1,410,904	817,272
Fairfax County	188,251	961,782	1,749,935	5,701,263	10,042	8,611,273	5,271,631	3,339,642
City of Fairfax	46,112	52,597	254,873	1,022,964	736	1,377,282	509,735	867,547
City of Falls Church	111,720	169,270	115,494	562,364	561	959,409	594,627	364,782
Loudoun County	20,825	187,580	166,514	162,711	4,190	541,820	57,910	483,910
Prince William County	37,024	310,502	415,119	197,062	1,055	960,762	611,787	348,975
City of Manassas	26,731	22,984	90,863	331,199	994	472,771	288,464	184,307
City of Manassas Park	1,389	416	2,567	599	0	4,971	881	4,090
Stafford County	10,134	6,859	131,283	1,698	249	150,223	32,978	117,245
Virginia Suburbs	652,403	5,255,778	3,983,001	11,014,629	25,394	20,931,205	12,335,586	8,595,619
MSA Total	5,161,274	20,882,440	11,550,440	21,059,930	703,372	59,357,456	18,517,199	40,840,257
Percent of Total	8.7	35.2	19.5	35.5	1.2	100.0	31.2	68.8
Central Jurisdictions	3,618,400	14,847,906	3,784,806	7,614,674	665,031	30,530,817	7,459,074	23,071,743
Inner Suburbs	1,313,046	5,223,183	6,171,005	12,592,706	28,196	25,328,136	9,665,149	15,662,987
Outer Suburbs	229,828	811,351	1,594,629	852,550	10,145	3,498,503	1,392,976	2,105,527

Federal Spending, 1996



Source: U.S. Dept. of Commerce, Economics and Statistics Administration, Bureau of the Census, Consolidated Federal Funds Report, FY1996.

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 is assigned to the recipient location.

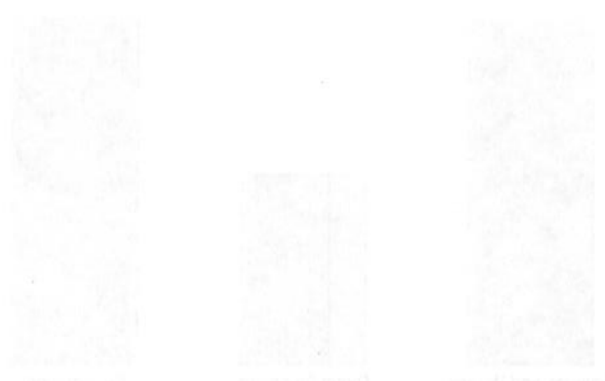
CONSTRUCTION

Construction in the metropolitan Washington region increased significantly during 1996, with developers breaking ground on more than 19.7 million square feet of commercial space. This was the greatest amount of new commercial development started in the region in any year since 1989. Prince George's County saw the most new commercial construction with nearly 4.8 million square feet.

The number of new privately owned housing units authorized in the region increased from 25,922 in 1995 to 26,631 in 1996. Of the permits that were issued in 1996, more than half were in the inner suburbs.

Year	Commercial	Industrial	Office	Other	Total
1995	12,500,000	1,500,000	5,000,000	1,000,000	20,000,000
1996	19,700,000	1,800,000	5,500,000	1,200,000	28,200,000

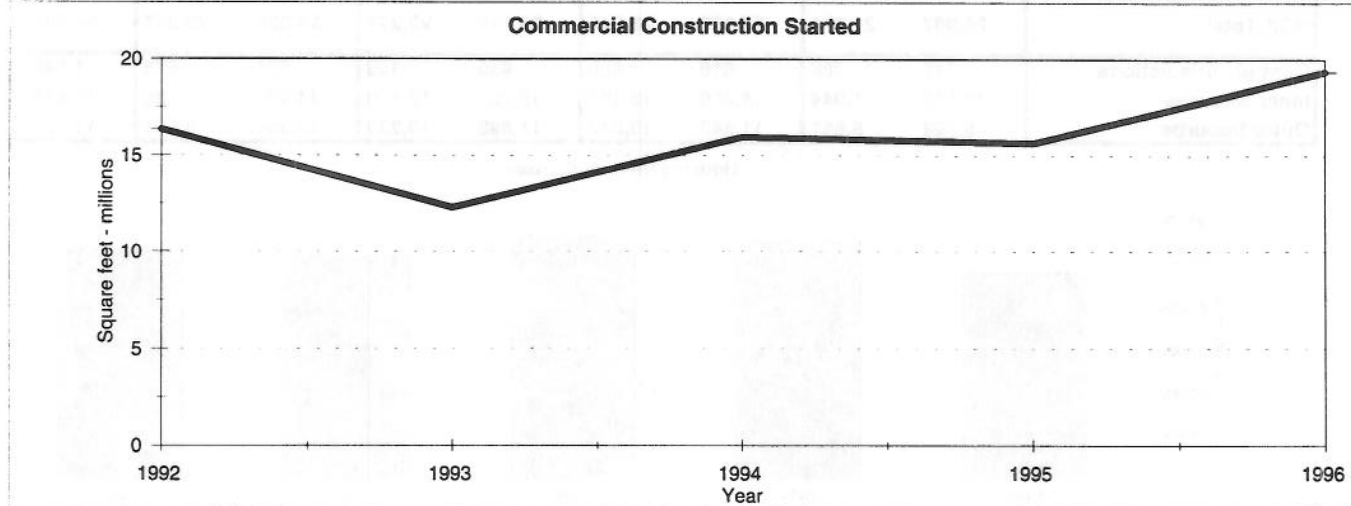
Table 1. Commercial Construction



Commercial Construction Increased in 1996

Table 7. Total Square Feet of Commercial Construction Started, by Jurisdiction, 1992-1996

JURISDICTIONS	1992	1993	1994	1995	1996	Total 1992-1996
District of Columbia	2,085,336	1,138,339	2,055,248	1,562,112	3,658,324	10,499,359
Calvert County	a/	a/	a/	a/	a/	a/
Charles County	309,104	549,430	360,073	316,501	500,585	2,035,693
Frederick County*	804,560	1,423,005	1,223,810	1,797,975	1,272,502	6,521,852
City of Frederick*	n/a	n/a	708,700	295,548	166,065	n/a
Montgomery County*	2,218,373	1,830,469	1,481,769	1,357,582	2,011,428	8,899,621
City of Gaithersburg*	n/a	n/a	236,025	148,269	49,350	n/a
City of Rockville*	n/a	n/a	212,000	79,948	310,363	n/a
City of Takoma Park (pt)*	n/a	n/a	0	0	0	n/a
Prince George's County*	2,183,481	1,623,356	2,974,816	2,783,595	4,775,211	14,340,459
City of Bowie*	n/a	n/a	31,441	328,400	379,835	n/a
City of College Park*	n/a	n/a	23,750	316,610	914,282	n/a
City of Greenbelt*	n/a	n/a	3,000	7,900	7,536	n/a
City of Takoma Park (pt)*	n/a	n/a	10,000	0	0	n/a
Maryland Suburbs	5,515,518	5,426,260	6,040,468	6,255,653	8,559,726	31,797,625
Arlington County	563,285	116,948	2,740,753	711,106	304,636	4,436,728
City of Alexandria	1,358,341	106,226	45,100	208,988	916,958	2,635,613
Fairfax County	4,252,502	3,019,215	2,614,577	3,424,528	3,139,504	16,450,326
City of Fairfax	1,859	14,300	195,600	55,310	38,000	305,069
City of Falls Church	18,700	41,000	0	15,233	0	74,933
Loudoun County	891,760	1,300,216	1,307,033	1,319,049	2,027,147	6,845,205
Prince William County b/	1,661,227	1,119,125	956,349	2,108,601	1,079,812	6,925,114
Stafford County	a/	a/	a/	a/	a/	a/
Virginia Suburbs	8,747,674	5,717,030	7,859,412	7,842,815	7,506,057	37,672,988
Region Total	16,348,528	12,281,629	15,955,128	15,660,580	19,724,107	79,969,972
Central Jurisdictions	4,006,962	1,361,513	1,361,513	2,482,206	4,879,918	14,092,112
Inner Suburbs	8,674,915	6,528,340	7,266,762	7,636,248	9,964,143	40,070,408
Outer Suburbs	3,666,651	4,391,776	3,847,265	5,542,126	4,880,046	22,327,864



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

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

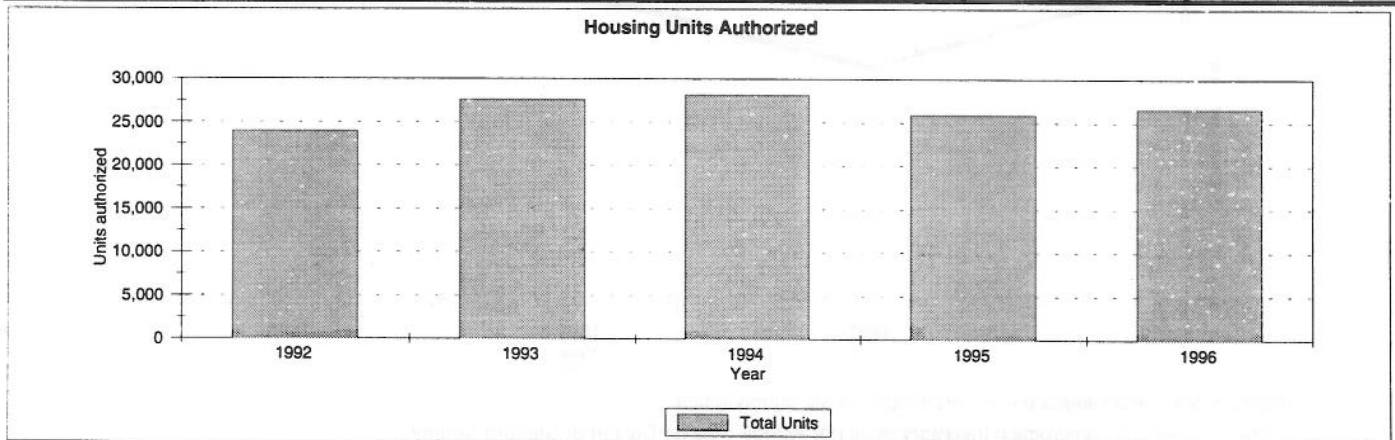
b/ Includes the Cities of Manassas and Manassas Park.

Source: COG Major Commercial Construction Inventory, June, 1997.

Majority of New Housing in Inner Suburbs

Table 8. New Privately Owned Housing Units Authorized in the Washington DC-MD-VA MSA, by Jurisdiction, 1992-1996

JURISDICTIONS	1992		1993		1994		1995		1996	
	Total	Single Family	Total	Single Family	Total	Single Family	Total	Single Family	Total	Single Family
District of Columbia	132	92	304	98	210	96	35	35	0	0
Calvert County	866	862	957	777	880	856	1,210	764	813	n/a
Charles County	941	819	1,094	1,094	1,060	1,046	1,051	1,051	1,175	n/a
Frederick County*	2,208	2,064	2,488	2,012	1,891	1,601	1,525	1,340	1,646	n/a
City of Frederick*	591	516	493	373	607	384	314	278	323	n/a
Montgomery County*	3,485	2,889	3,132	2,698	3,590	2,976	3,682	2,833	2,843	n/a
City of Gaithersburg*	379	245	404	360	333	291	191	135	171	n/a
City of Rockville*	44	44	77	77	49	49	23	23	88	n/a
City of Takoma Park (pt)*	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Prince George's County*	4,638	4,248	5,359	4,675	4,242	3,800	3,584	3,474	3,471	n/a
City of Bowie*	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
City of College Park*	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
City of Greenbelt*	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
City of Takoma Park (pt)*	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Maryland Suburbs	12,138	10,882	13,030	11,256	11,663	10,279	11,052	9,462	9,948	n/a
Arlington County	496	110	251	241	344	168	618	328	471	n/a
City of Alexandria	84	84	263	157	285	189	251	215	1,071	n/a
Fairfax County	5,434	4,791	6,775	6,028	7,795	5,688	7,226	4,446	7,187	n/a
City of Fairfax	9	9	0	0	92	92	132	70	107	n/a
City of Falls Church	7	7	0	0	2	2	3	3	6	n/a
Loudoun County	2,424	2,309	3,018	2,773	3,811	3,046	2,802	2,450	3,191	n/a
Prince William County	1,909	1,459	2,161	1,755	2,309	2,095	2,574	1,837	2,999	n/a
City of Manassas	205	197	225	205	219	209	201	201	166	n/a
City of Manassas Park	64	64	0	0	107	107	48	48	93	n/a
Stafford County	1,085	1,067	1,603	1,431	1,316	1,270	980	962	1,392	n/a
Virginia Suburbs	11,717	10,097	14,296	12,590	16,280	12,866	14,835	10,560	16,683	n/a
MSA Total	23,987	21,071	27,630	23,944	28,153	23,241	25,922	20,057	26,631	n/a
Central Jurisdictions	712	286	818	496	839	453	904	578	1,542	n/a
Inner Suburbs	13,573	11,944	15,266	13,401	15,721	12,558	14,627	10,826	13,614	n/a
Outer Suburbs	9,702	8,841	11,546	10,047	11,593	10,230	10,391	8,653	11,475	n/a



Source: U.S. Department of Commerce, Bureau of the Census, C-40 Reports, "Permit Authorized Construction in Selected Permit-issuing Places."

* Construction starts in Maryland cities are included in appropriate county totals.

NEW HOME SALES, MORTGAGE RATES,
AND HOUSING INFLATION

Mortgage Rates

After falling in 1995, mortgage rates rose slightly in 1996, from 7.3 percent to 7.8 percent.

New Homes Sold

The number of new homes sold in the region remained fairly constant, increasing from 18,836 in 1995 to 18,848 in 1996. However, only Loudoun, Montgomery, Frederick and Prince William counties saw increases in the number of new homes sold.

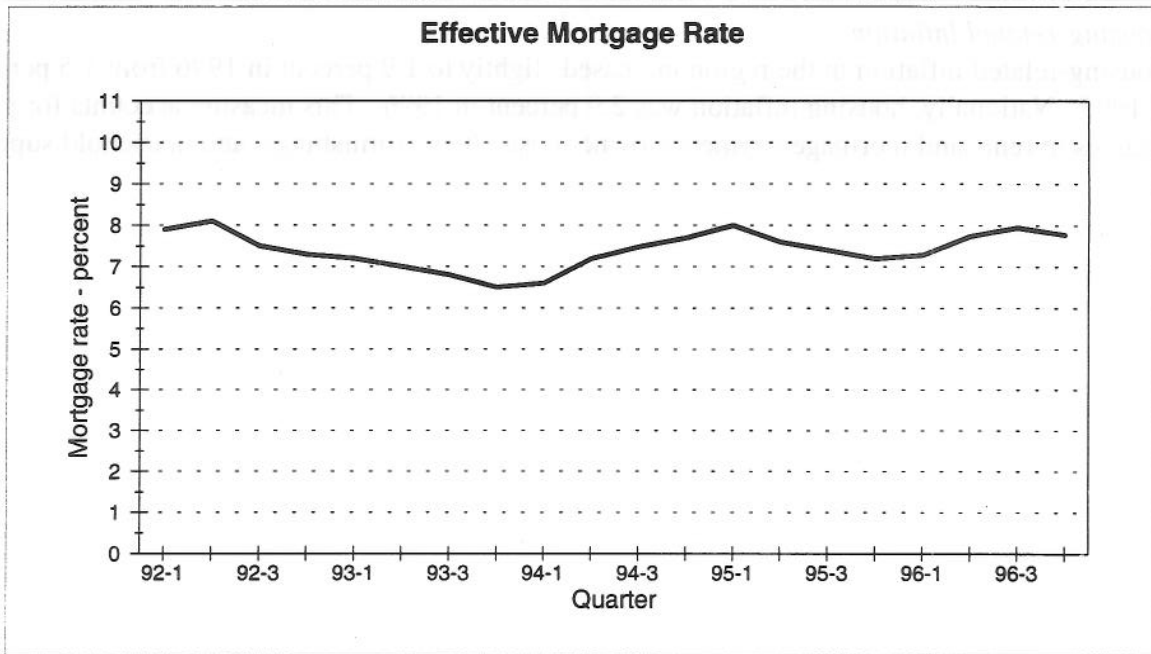
Housing-related Inflation

Housing-related inflation in the region increased slightly to 1.9 percent in 1996 from 1.5 percent in 1995. Nationally, housing inflation was 2.9 percent in 1996. This measure accounts for price changes in rents and mortgage payments, owner costs, fuels, furnishings, and household supplies.

Mortgage Rates Increased Slightly During 1996

Table 9. Terms on Conventional Home Mortgages, Averages for Closed Loans in the Washington-Baltimore DC-MD-VA-WV CMSA, 1992-1996

Quarter	Year				
	1992	1993	1994	1995	1996
First Quarter	7.9	7.2	6.6	8.0	7.3
Second Quarter	8.1	7.0	7.2	7.6	7.7
Third Quarter	7.5	6.8	7.5	7.4	8.0
Fourth Quarter	7.3	6.5	7.7	7.2	7.8



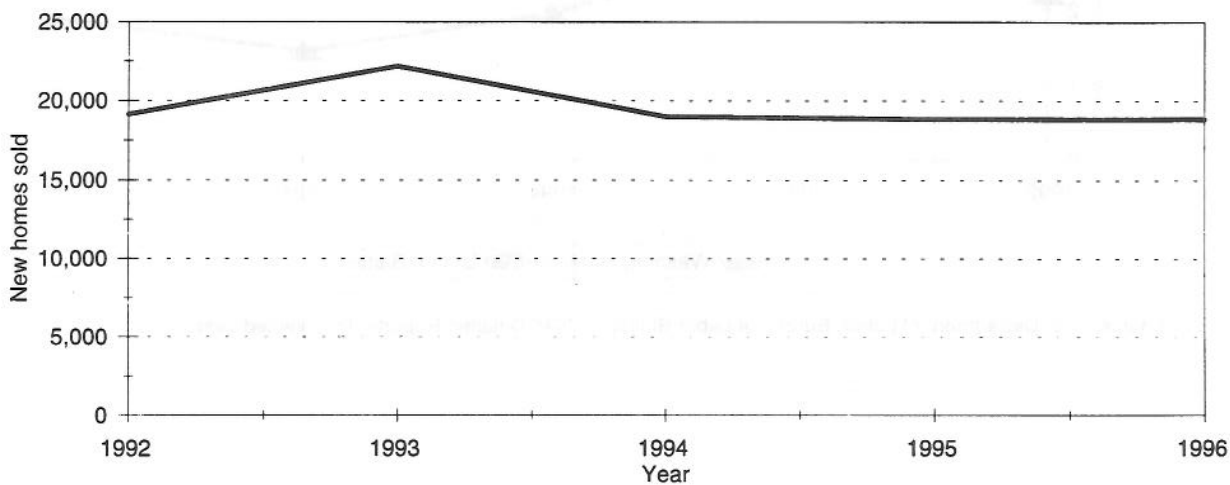
Source: Federal Housing Finance Board News Report. Terms on Conventional Home Mortgages, Averages for Major Metropolitan Areas: Loans Closed

The Number of New-Home Sales Remained Steady in 1996

Table 10. Net New-Home Sales for Selected Jurisdictions, 1992-1996

JURISDICTIONS	Year					Change 1995-1996	
	1992	1993	1994	1995	1996	Number	Percent
District of Columbia	340	389	271	220	290	70	31.8
Calvert County	a/	a/	a/	a/	a/	a/	a/
Charles County	507	681	649	659	590	-69	-10.5
Frederick County	1,336	1,502	1,205	1,286	1,411	125	9.7
Montgomery County	3,027	3,246	2,752	2,545	2,760	215	8.4
Prince George's County	3,880	4,116	3,169	3,154	3,111	-43	-1.4
Maryland Suburbs	8,750	9,545	7,775	7,644	7,872	228	3.0
Alexandria/Arlington b/	719	862	747	743	529	-214	-28.8
Fairfax County c/	4,391	5,240	4,537	4,520	4,175	-345	-7.6
Loudoun County	2,090	2,776	2,610	2,566	2,793	227	8.8
Prince William County d/	2,035	2,243	2,218	2,420	2,472	52	2.1
Stafford County	813	1,118	854	723	717	-6	-0.8
Virginia Suburbs	10,048	12,239	10,966	10,972	10,686	-286	-2.6
Region Total	19,138	22,173	19,012	18,836	18,848	12	0.1
Central Jurisdictions	1,059	1,251	1,018	963	819	-144	-15.0
Inner Suburbs	11,298	12,602	10,458	10,219	10,046	-173	-1.7
Outer Suburbs	6,781	8,320	7,536	7,654	7,983	329	4.3

New Homes Sold



Source: Housing Data Reports, Inc., 1996. Includes single-family, townhomes, and condominiums.

a/ Data not available.

b/ Data could not be broken down for individual jurisdiction.

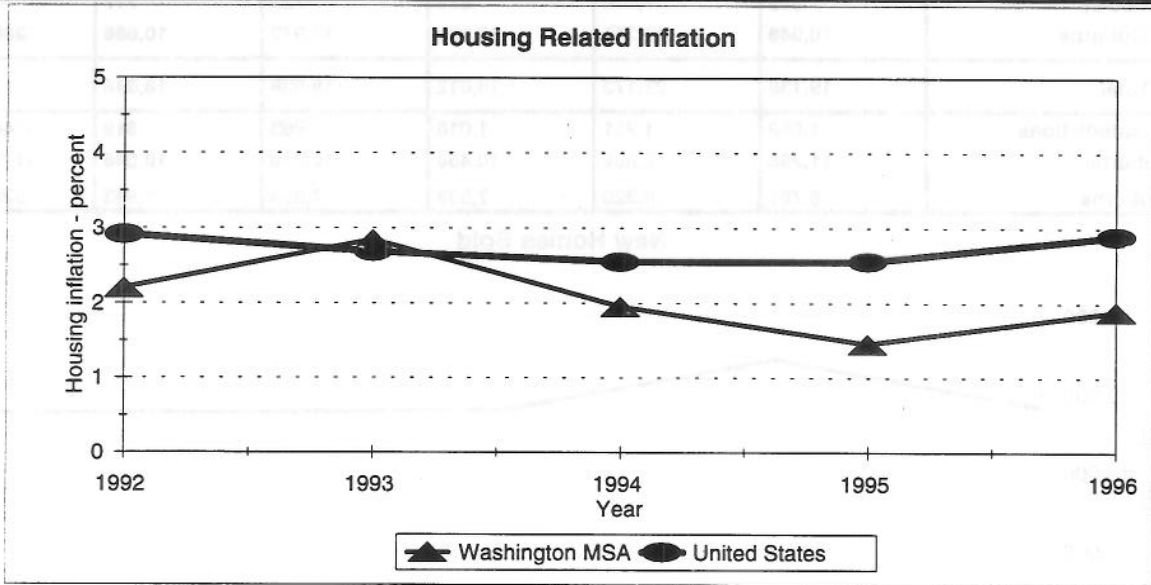
c/ Includes Cities of Falls Church and Fairfax

d/ Includes Cities of Manassas and Manassas Park

Housing-Related Inflation Low in 1996

Table 11. Housing Component of Consumer Price Index
 All Urban Consumers, Washington DC-MD-VA MSA, 1992-1996
 (1982-1984=100)

	1992	1993	1994	1995	1996
Washington DC-MD-VA MSA					
CPI-U, Housing	143.9	148.0	150.9	153.1	156.0
Housing Inflation Rate (%)	2.2	2.8	2.0	1.5	1.9
United States					
CPI-U, Housing	137.5	141.2	144.8	148.5	152.8
Housing Inflation Rate (%)	2.9	2.7	2.5	2.6	2.9

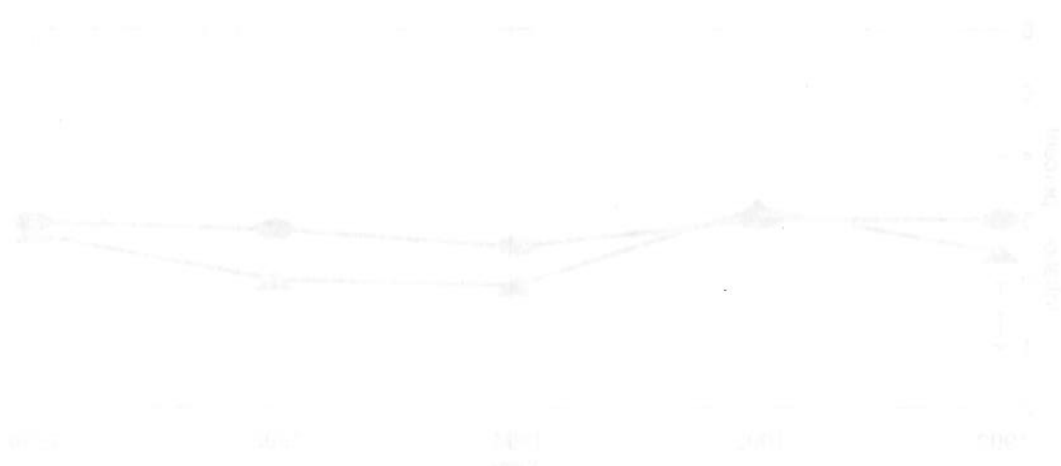


Source: U.S. Department of Labor, Bureau of Labor Statistics, "CPI Detailed Reports" for selected years.

INFLATION

The national Consumer Price Index for All Urban Consumers (CPI-U) increased by only 3.0 percent between 1995 and 1996. Regionally, there was only a 2.8 percent increase. Behind the regional inflation rate were the following topical changes:

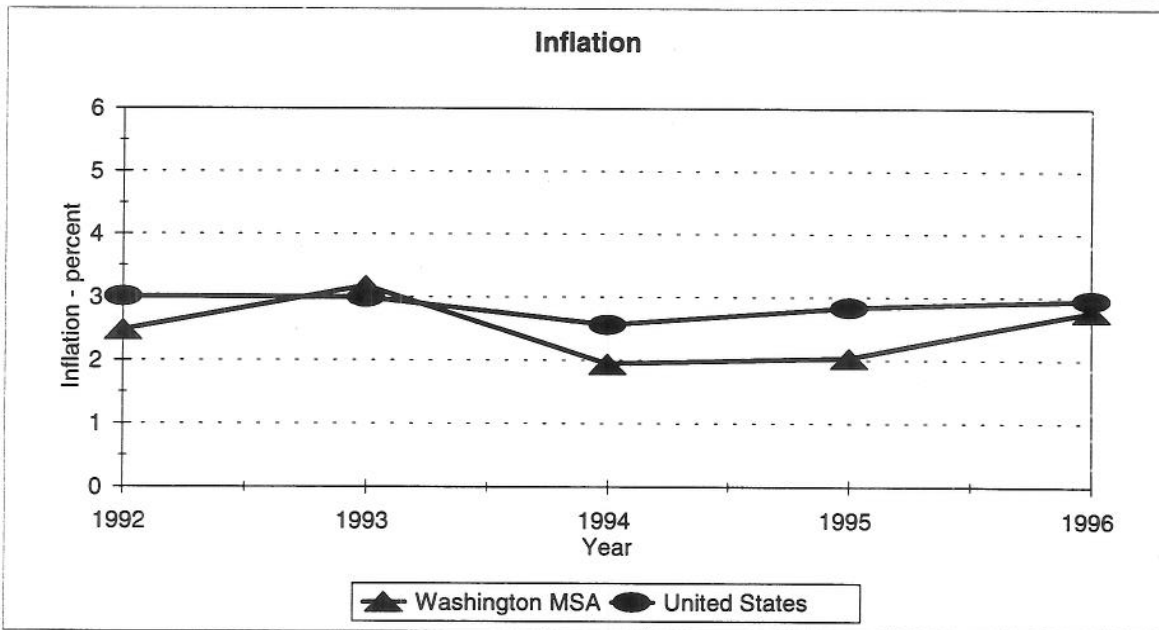
Category	Change (%)
Entertainment	3.7 %
Medical care	4.1 %
Other goods and services	6.0 %
Transportation	3.1 %
Food and beverages	3.6 %
Housing	1.9 %
Apparel and upkeep	-0.4 %



Regional Inflation Rate Was 2.8 Percent in 1996

**Table 12. Consumer Price Index and Inflation - All Urban Consumers
in the Washington DC-MD-VA MSA, 1992-1996
(1982-1984=100)**

	1992	1993	1994	1995	1996
Washington DC-MD-VA MSA					
CPI-U	144.7	149.3	152.2	155.3	159.6
Inflation Rate (%)	2.5	3.2	1.9	2.0	2.8
United States					
CPI-U	140.3	144.5	148.2	152.4	156.9
Inflation Rate (%)	3.0	3.0	2.6	2.8	3.0



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

INCOME

Total personal income in the Washington region grew by an average annual rate of 4.7 percent between 1990 and 1994, leading to a 1994 total of \$121 billion. Total income growth was fastest in the outer suburbs, which increased by an average of 6.1 percent per year.

On a per capita basis, income varied greatly by jurisdiction. Montgomery County, Arlington County, and the City of Alexandria topped the region in per capita income, all with incomes of approximately \$35,000 per person. Stafford County had the lowest per capita income at \$18,353. The per capita income for the region was \$29,966 in 1994.

Jurisdiction	1990	1991	1992	1993	1994
Montgomery County	32,000	33,000	34,000	35,000	35,000
Arlington County	32,000	33,000	34,000	35,000	35,000
City of Alexandria	32,000	33,000	34,000	35,000	35,000
Stafford County	18,353	18,353	18,353	18,353	18,353
Region	29,966	29,966	29,966	29,966	29,966



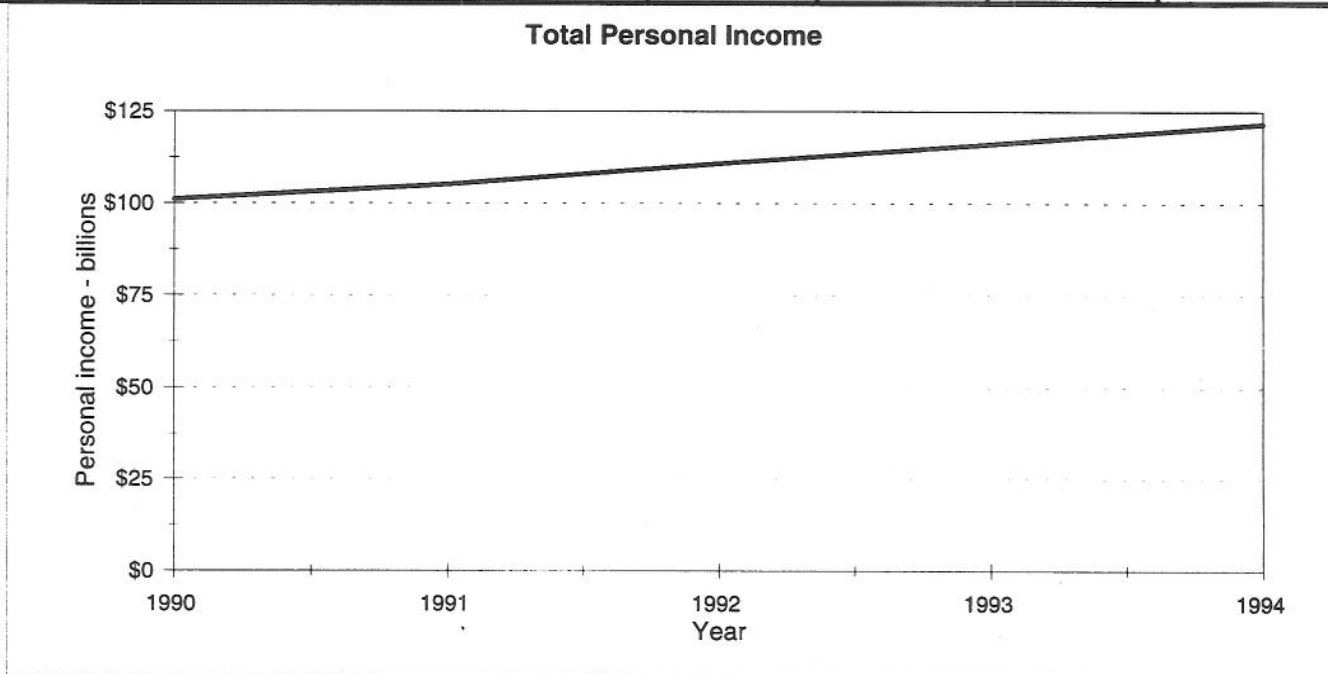
Personal Income Growth Averaged Nearly Five Percent Per Year

Table 13. Total Personal Income in the Washington DC-MD-VA MSA, by Jurisdiction, 1990-1994

(Thousands of dollars)

JURISDICTIONS	Year					Avg. Annual Percent Change 1990-1994
	1990	1991	1992	1993	1994	
District of Columbia	\$14,878,019	\$15,445,501	\$16,401,954	\$17,009,119	\$17,400,594	4.0
Calvert County	1,066,143	1,104,363	1,167,553	1,258,714	1,345,010	6.0
Charles County	1,953,615	2,012,419	2,122,089	2,241,650	2,347,695	4.7
Frederick County	2,949,008	3,026,071	3,251,441	3,469,182	3,711,653	5.9
Montgomery County	24,149,722	24,952,184	26,051,722	27,242,542	28,525,598	4.3
Prince George's County	14,881,282	15,191,619	15,805,799	16,474,195	17,204,500	3.7
Maryland Suburbs	\$44,999,770	\$46,286,656	\$48,398,604	\$50,686,283	\$53,134,456	4.2
Arlington County	5,166,294	5,367,561	5,663,235	5,900,671	6,176,701	4.6
City of Alexandria	3,387,146	3,520,963	3,707,588	3,839,950	3,988,382	4.2
Fairfax County a/	24,590,804	26,043,923	27,579,844	29,091,823	30,560,975	5.6
Loudoun County	2,141,431	2,230,413	2,418,064	2,658,778	2,938,163	8.2
Prince William County b/	4,854,955	5,042,546	5,360,669	5,678,620	5,999,498	5.4
Stafford County	1,056,746	1,111,788	1,203,380	1,321,191	1,426,251	7.8
Virginia Suburbs	\$41,197,376	\$43,317,194	\$45,932,780	\$48,491,033	\$51,089,970	5.5
Region Total	\$101,075,165	\$105,049,351	\$110,733,338	\$116,186,435	\$121,625,020	4.7
Central Jurisdictions	\$23,431,459	\$24,334,025	\$25,772,777	\$26,749,740	\$27,565,677	4.1
Inner Suburbs	63,621,808	66,187,726	69,437,365	72,808,560	76,291,073	4.6
Outer Suburbs	14,021,898	14,527,600	15,523,196	16,628,135	17,768,270	6.1

Total Personal Income



Source: U.S. Department of Commerce, Bureau of Economic Analysis, Regional Economic Information System.
Data released June 1996.

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.

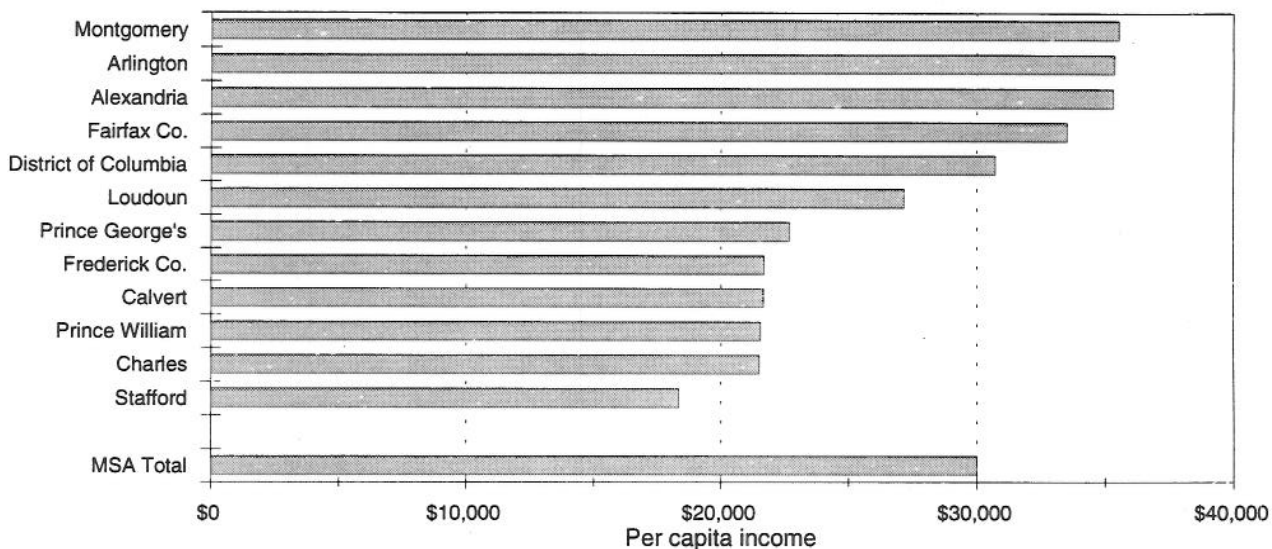
Per Capita Income Varied by Jurisdiction

Table 14. Per Capita Income in the Washington DC-MD-VA MSA, by Jurisdiction, 1990-1994

(Dollars)

JURISDICTIONS	Year					Avg. Annual Percent Change 1990-1994	Ratio to MSA 1994
	1990	1991	1992	1993	1994		
District of Columbia	\$24,648	\$25,988	\$27,998	\$29,427	\$30,684	5.6	102%
Calvert County	20,514	20,265	20,458	21,083	21,631	1.3	72%
Charles County	19,188	19,333	20,053	20,849	21,480	2.9	72%
Frederick County	19,489	19,494	20,329	20,917	21,671	2.7	72%
Montgomery County	31,793	32,423	33,367	34,377	35,536	2.8	119%
Prince George's County	20,345	20,480	21,136	21,932	22,645	2.7	76%
Maryland Suburbs	\$24,082	\$25,054	\$25,363	\$26,288	\$27,202	3.1	91%
Arlington County	30,255	31,431	33,937	34,089	35,376	4.0	118%
City of Alexandria	30,355	31,214	32,126	33,631	35,333	3.9	118%
Fairfax County a/	28,902	30,076	31,292	32,445	33,529	3.8	112%
Loudoun County	24,575	24,786	25,682	26,349	27,176	2.5	91%
Prince William County b/	19,239	19,531	20,168	20,793	21,544	2.9	72%
Stafford County	16,987	16,858	17,394	17,977	18,353	2.0	61%
Virginia Suburbs	\$26,749	\$27,494	\$28,890	\$29,967	\$31,070	3.8	104%
MSA	\$25,929	\$26,753	\$27,876	\$28,919	\$29,966	3.7	100%

Per Capita Income, 1994



Source: U.S. Department of Commerce, Bureau of Economic Analysis, Regional Economic Information System.

Data released June 1996.

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.

RETAIL SALES

Retail sales in the region increased in both nominal and real terms between 1992 and 1996. After slipping from \$43.7 billion in 1994 to \$43.2 billion in 1995, local retail sales rose to \$44.0 billion in 1996 (all figures in 1996 dollars). National retail sales also rose again in 1996 after declining (in real terms) between 1994 and 1995.

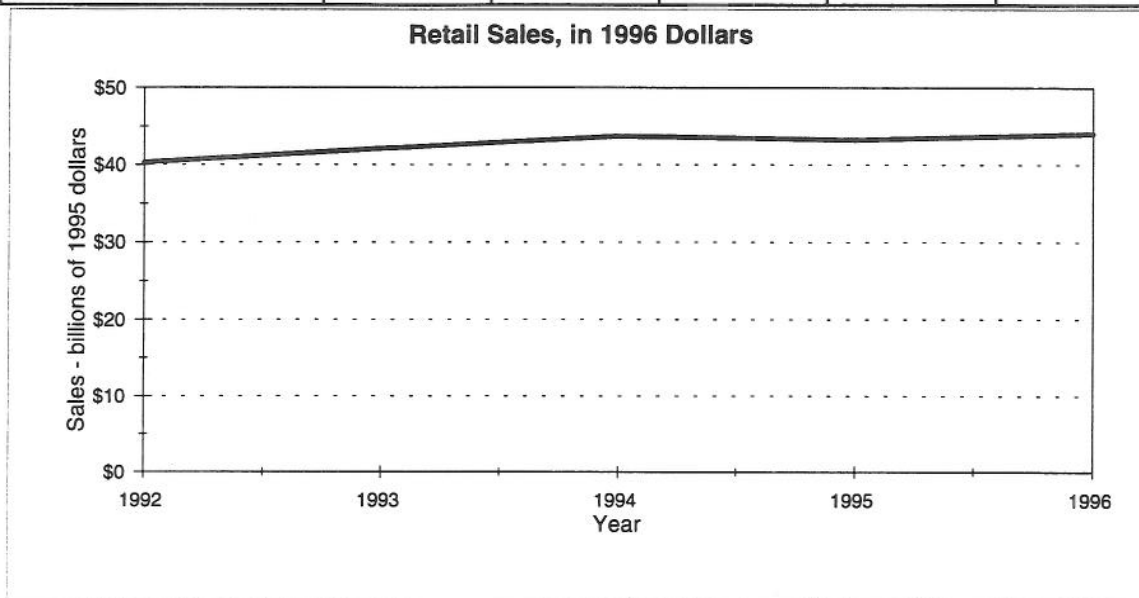
Year	Region	1992	1993	1994	1995	1996
1992	Region	43.7	43.7	43.7	43.7	43.7
1993	Region	43.7	43.7	43.7	43.7	43.7
1994	Region	43.7	43.7	43.7	43.7	43.7
1995	Region	43.7	43.7	43.7	43.2	43.2
1996	Region	43.7	43.7	43.7	43.2	44.0
1992	National	43.7	43.7	43.7	43.7	43.7
1993	National	43.7	43.7	43.7	43.7	43.7
1994	National	43.7	43.7	43.7	43.7	43.7
1995	National	43.7	43.7	43.7	43.7	43.7
1996	National	43.7	43.7	43.7	43.7	43.7

Retail Sales Increased in Both Nominal and Real Dollars

Table 15. Retail Sales in the Washington DC-MD-VA MSA, 1992 - 1996

(Millions of dollars)

	1992	1993	1994	1995	1996
Washington DC-MD-VA MSA					
Sales reported	\$35,636	\$38,145	\$40,886	\$42,033	\$44,042
Sales reported (1996 dollars)	\$40,280	\$42,073	\$43,707	\$43,197	\$44,042
United States					
Sales reported	\$1,951,589	\$2,075,083	\$2,231,233	\$2,340,817	\$2,464,706
Sales reported (1996 dollars)	\$2,248,196	\$2,320,602	\$2,422,702	\$2,409,936	\$2,464,706



Source: U.S. Department of Commerce, Bureau of the Census, Combined Annual and Revised Monthly Retail Trade, 1996.

AIRLINE PASSENGERS

More than 41 million passengers flew into or out of the Washington region's three major airports in 1996, a 14.6 percent increase from 1992. Washington National, with 15.1 million passengers, led the three airports. Baltimore-Washington International served 13.4 million and Dulles served 12.8 million passengers.

Year	Washington National	Baltimore-Washington International	Dulles	Total
1992	13.5	11.5	10.5	35.5
1996	15.1	13.4	12.8	41.3

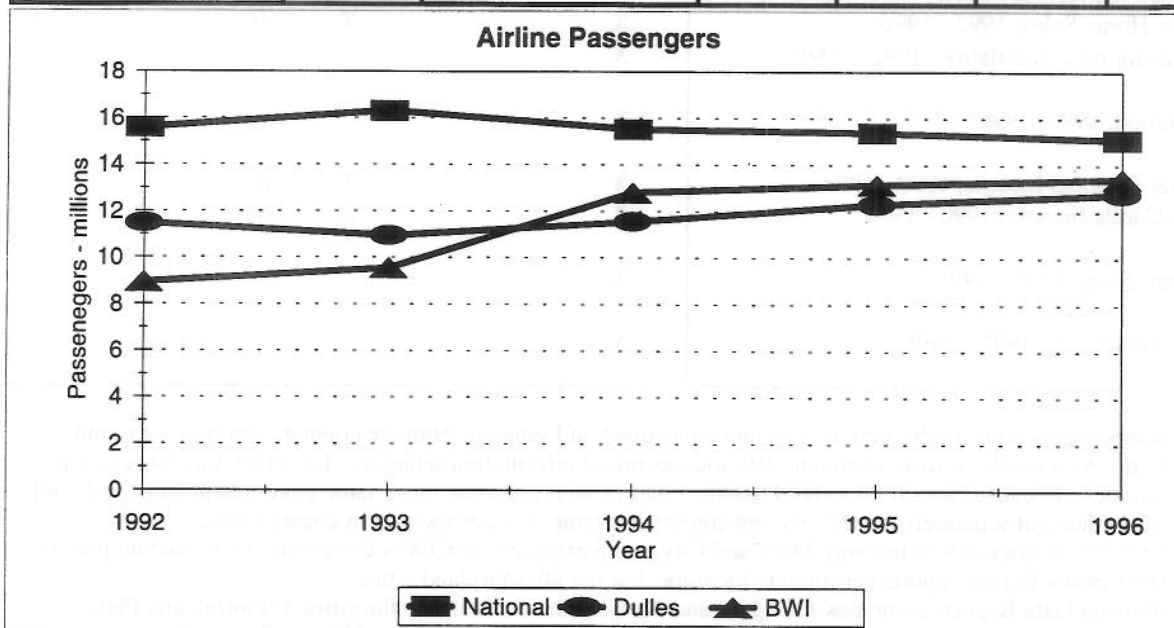


Dulles and BWI Volume Increased in 1996, National Still Highest

Table 16. Number of Air Passengers Traveling To or From BWI, Dulles, and National Airports, 1992-1996

(Thousands of Passengers)

	Year					Total Change 1992-1996	
	1992	1993	1994	1995	1996	Passenger	Percent
Baltimore-Washington International	8,956	9,548	12,817	13,163	13,432	4,476	50.0
Washington-Dulles International	11,496	10,947	11,561	12,321	12,774	1,278	11.1
Washington National	15,594	16,308	15,517	15,386	15,096	-498	-3.2
Total Air Passengers	36,046	36,803	39,895	40,870	41,302	5,256	14.6



Source: Federal Aviation Administration and Maryland State Aviation Administration, BWI Airport Comparative Summary Activity; Dulles International Airport, Monthly Air Traffic Summary; Washington National Airport Traffic Summary.

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 is presented for as many local governments as possible. Wherever possible, data prepared by COG - including population and commercial construction - includes 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 Indep. Cities a/	All COG members
Population, 1992 - 1996	X	X	X
Population Forecast, 1990 - 2020	X	X b/	
Employment, 1992 - 1996	X	X	
Employment Forecast, 1990 - 2020	X	X b/	
Federal Spending, 1992 - 1996	X	X	
Commercial Construction Starts, 1992 - 1996	X	X	X
New Homes Permitted, 1992 - 1996	X	X	X c/
Effective Mortgage Rates, 1992 - 1996	X		
New Home Sales, 1992 - 1996	X	X d/	
Housing-related Inflation, 1992 - 1996	X		
Inflation, 1992 - 1996	X		
Total Personal Income, 1990 - 1994	X	X e/	
Per Capita Income, 1990 - 1994	X	X e/	
Retail Sales, 1992 - 1996	X		
Air Passengers, 1992 - 1996	X		

- a/ Independents cities in the state 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 combines Arlington and Alexandria, and includes the cities of Fairfax and Falls Church in Fairfax County data and Manassas and Manassas Park in Prince William County data.
- 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 Table 1. Direct Federal Expenditures and Obligations
in the Washington DC-MD-VA MSA, by Jurisdiction, FY1995**

(Thousands of Dollars)

JURISDICTIONS	Grant Awards	Salaries and Wages	Direct Payments for Individuals	Procurement Contract Awards	Other	Total	1995 Total	
							Department of Defense	Non-Defense
District of Columbia	3,045,893	11,393,771	2,685,702	4,092,937	694,101	21,912,505	2,142,583	19,769,922
Calvert County	16,702	6,824	135,296	3,198	223	163,244	19,070	144,174
Charles County	39,606	138,087	252,730	51,759	757	482,916	199,860	283,056
Frederick County	80,013	126,526	329,667	66,728	1,995	604,930	133,026	471,904
Montgomery County	612,983	2,527,775	2,040,579	3,326,603	8,070	8,516,009	1,964,544	6,551,465
Prince George's County	455,023	1,423,616	1,769,884	2,409,929	9,968	8,068,420	1,366,401	6,702,019
Maryland Suburbs	1,204,327	4,222,828	4,528,156	5,858,217	21,013	17,835,519	3,682,901	14,152,618
Arlington County	141,726	2,792,101	498,016	1,837,544	2,854	5,271,969	3,281,120	1,990,849
City of Alexandria	63,705	65,715	548,587	858,220	4,173	2,125,400	1,257,978	867,422
Fairfax County	244,798	877,860	1,828,969	4,752,279	12,108	7,516,012	4,213,568	3,302,444
City of Fairfax	49,785	46,008	243,966	1,315,518	749	1,658,027	531,745	1,126,282
City of Falls Church	125,282	168,824	121,557	123,599	575	539,836	198,089	341,747
Loudoun County	17,807	192,089	181,035	103,987	4,858	478,577	63,831	414,746
Prince William County	78,825	303,900	372,182	165,710	998	821,616	564,373	257,243
City of Manassas	19,727	22,011	94,513	265,019	3,379	404,648	249,768	154,880
City of Manassas Park	3,928	0	5,982	285,019	0	8,924	3,359	5,565
Stafford County	10,253	6,277	124,995	2,456	276	144,257	34,664	109,593
Virginia Suburbs	755,836	4,474,785	4,019,802	9,709,351	29,970	18,969,266	10,398,495	8,570,771
MSA Total	5,006,056	20,091,384	11,233,660	19,660,505	745,084	58,717,290	16,223,979	42,493,311
Percent of Total	8.5	34.2	19.1	33.5	1.3	100.0	27.6	72.4
Central Jurisdictions	3,251,324	14,251,587	3,732,305	6,788,701	701,128	29,309,874	6,681,681	22,628,193
Inner Suburbs	1,487,871	5,044,083	6,004,955	11,927,928	31,470	26,298,304	8,274,347	18,023,957
Outer Suburbs	266,861	795,714	1,496,400	943,876	12,486	3,109,112	1,267,951	1,841,161

Source: U.S. Dept. of Commerce, Economics and Statistics Administration, Bureau of the Census, Consolidated Federal Funds Report, FY1995.

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 is located at the recipient location.

Appendix Table 2. Direct Federal Expenditures and Obligations
in the Washington DC-MD-VA MSA, by Jurisdiction, FY1994

(Thousands of Dollars)

JURISDICTIONS	Grant Awards	Salaries and Wages	Direct Payments for Individuals	Procurement Contract Awards	Other	Total	1994 Total	
							Department of Defense	Non-Defense
District of Columbia	3,173,517	11,415,021	2,613,049	4,103,030	858,335	22,162,952	2,328,902	19,834,050
Calvert County	17,864	11,433	139,102	6,462	188	175,048	21,127	153,921
Charles County	42,307	143,045	236,893	59,054	709	482,007	203,359	278,648
Frederick County	68,186	126,613	304,832	72,694	1,370	573,696	139,296	434,400
Montgomery County	650,674	2,587,321	2,217,125	2,751,439	3,728	8,210,286	1,975,569	6,234,717
Prince George's County	346,313	1,441,003	1,771,792	2,551,508	3,914	6,114,530	1,470,551	4,643,979
Maryland Suburbs	1,125,344	4,309,415	4,669,744	5,441,157	9,909	15,555,567	3,809,902	11,745,665
Arlington County	134,123	2,852,867	581,516	1,580,445	1,475	5,150,426	3,251,910	1,898,516
City of Alexandria	78,109	662,246	591,250	744,080	3,821	2,079,505	1,178,478	901,027
Fairfax County	211,637	1,009,086	1,747,100	4,725,201	4,619	7,697,643	4,007,808	3,689,835
City of Fairfax	47,323	43,035	209,002	636,378	269	936,006	361,131	574,875
City of Falls Church	117,676	192,737	137,368	123,381	192	571,354	194,735	376,619
Loudoun County	9,752	171,274	157,585	71,242	2,004	411,857	69,715	342,142
Prince William County	114,570	346,543	359,205	142,451	699	963,468	546,989	416,479
City of Manassas	19,984	17,846	72,233	305,642	2,984	418,688	306,312	112,376
City of Manassas Park	3,868	4,946	6,072	185	0	15,071	3,474	11,597
Stafford County	10,775	23,695	114,664	3,118	229	152,482	33,358	119,124
Virginia Suburbs	747,817	5,324,275	3,975,995	8,332,123	16,292	18,396,500	9,953,910	8,442,590
MSA Total	5,046,678	21,048,711	11,258,788	17,876,310	884,536	56,115,019	16,092,714	40,022,305
Percent of Total	9.0	37.5	20.1	31.9	1.6	100.0	28.7	71.3
Central Jurisdictions	3,385,749	14,930,134	3,785,815	6,427,555	863,631	29,392,883	6,759,290	22,633,593
Inner Suburbs	1,373,623	5,273,182	6,082,387	10,787,907	12,722	23,529,819	8,009,794	15,520,025
Outer Suburbs	287,306	845,395	1,390,586	660,848	8,183	3,192,317	1,323,630	1,868,687

Source: U.S. Dept. of Commerce, Economics and Statistics Administration, Bureau of the Census, Consolidated Federal Funds Report, FY1994.

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 is located at the recipient location.

**Appendix Table 3. Direct Federal Expenditures and Obligations
in the Washington DC-MD-VA MSA, by Jurisdiction, FY1993**

(Thousands of Dollars)

JURISDICTIONS	Grant Awards	Salaries and Wages	Direct Payments for Individuals	Procurement Contract Awards	Other	Total	1993 Total	
							Department of Defense	Non-Defense
District of Columbia	3,128,433	10,236,174	2,511,535	4,011,913	829,600	20,717,655	2,807,408	17,910,247
Calvert County	17,117	11,777	123,844	16,851	276	169,866	30,982	138,884
Charles County	34,361	141,748	213,365	72,413	671	462,558	215,103	247,455
Frederick County	45,731	131,838	279,823	63,323	2,141	522,856	129,090	393,766
Montgomery County	458,643	2,432,471	2,076,154	2,716,396	4,037	7,687,703	1,715,996	5,971,707
Prince George's County	304,039	1,420,454	1,665,890	1,901,360	7,419	5,299,162	1,208,545	4,090,617
Maryland Suburbs	859,891	4,138,288	4,359,076	4,770,343	14,544	14,142,145	3,299,716	10,842,429
Arlington County	153,607	2,792,745	556,678	1,428,793	1,477	4,933,299	3,126,637	1,806,662
City of Alexandria	71,518	678,495	556,327	633,482	4,152	1,943,973	1,105,086	838,887
Fairfax County	232,495	1,010,863	1,630,382	4,051,394	9,640	6,934,773	3,493,822	3,440,951
City of Fairfax	43,593	27,514	216,596	622,088	0	909,791	313,815	595,976
City of Falls Church	115,222	192,213	134,354	115,459	453	557,700	195,295	362,405
Loudoun County	28,881	191,366	136,931	48,904	4,182	410,263	45,693	364,570
Prince William County	34,804	328,071	333,021	120,483	1,425	817,803	492,116	325,687
City of Manassas	8,767	8,392	63,010	334,777	1,359	416,305	296,418	119,887
City of Manassas Park	3,959	4,870	8,285	98	0	17,213	5,898	11,315
Stafford County	10,883	23,444	103,114	1,815	256	139,512	32,396	107,116
Virginia Suburbs	703,729	5,257,973	3,738,698	7,357,293	22,944	17,080,632	9,107,176	7,973,456
MSA Total	4,692,053	19,632,435	10,609,309	16,139,549	867,088	51,940,432	15,214,300	36,726,132
Percent of Total	9.0	37.8	20.4	31.1	1.7	100.0	29.3	70.7
Central Jurisdictions	3,353,558	13,707,414	3,624,540	6,074,188	835,229	27,594,927	7,039,131	20,555,796
Inner Suburbs	1,153,992	5,083,515	5,723,376	9,406,697	21,549	21,389,129	6,927,473	14,461,656
Outer Suburbs	184,503	841,506	1,261,393	658,664	10,310	2,956,376	1,247,696	1,708,680

Source: U.S. Dept. of Commerce, Economics and Statistics Administration, Bureau of the Census, Consolidated Federal Funds Report, FY1993.

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 is assigned to the recipient location.

**Appendix Table 4. Direct Federal Expenditures and Obligations
in the Washington DC-MD-VA MSA, by Jurisdiction, FY1992**
(Thousands of Dollars)

JURISDICTIONS	Grant Awards	Salaries and Wages	Direct Payments for Individuals	Procurement Contract Awards	Other	Total	1992 Total	
							Department of Defense	Non-Defense
District of Columbia	2,829,868	10,058,885	2,420,647	4,198,862	832,991	20,341,253	2,729,066	17,612,185
Calvert County	14,634	10,687	114,670	10,164	118	150,274	22,912	127,362
Charles County	26,695	136,894	178,695	44,539	439	387,260	181,076	206,184
Frederick County	44,311	123,836	260,150	61,461	3,386	493,143	123,390	369,753
Montgomery County	387,251	2,262,360	1,957,148	2,746,029	2,253	7,355,041	1,685,940	5,669,101
Prince George's County	307,677	1,394,081	1,584,944	1,914,297	3,975	5,204,973	1,366,915	3,838,058
Maryland Suburbs	780,568	3,927,858	4,095,607	4,776,490	10,171	13,590,691	3,380,233	10,210,458
Arlington County	132,041	2,666,194	539,951	1,187,165	287	4,525,636	2,868,459	1,657,177
City of Alexandria	73,565	653,926	523,460	682,307	3,136	1,936,395	1,061,187	875,208
Fairfax County	204,936	979,495	1,523,582	3,560,276	5,004	6,273,293	3,023,795	3,249,498
City of Fairfax	33,573	21,920	205,850	485,326	3	746,672	252,893	493,779
City of Falls Church	113,188	179,755	129,679	286,422	194	709,237	325,122	384,115
Loudoun County	10,570	103,089	131,404	24,217	1,011	270,292	28,070	242,222
Prince William County	20,949	321,338	296,713	123,051	699	762,749	479,290	283,459
City of Manassas	4,496	7,142	59,095	275,477	789	346,999	269,762	77,237
City of Manassas Park	3,202	4,400	7,374	37	0	15,013	5,148	9,865
Stafford County	9,366	19,975	83,092	978	168	113,579	27,794	85,785
Virginia Suburbs	605,886	4,957,234	3,500,200	6,625,256	11,291	15,699,865	8,341,520	7,358,345
MSA Total	4,216,322	18,943,977	10,016,454	15,600,608	854,453	49,631,809	14,450,821	35,180,988
Percent of Total	8.5	38.2	20.2	31.4	1.7	100.0	29.1	70.9
Central Jurisdictions	3,035,474	13,379,005	3,484,058	6,068,334	836,414	26,803,284	6,658,714	20,144,570
Inner Suburbs	1,046,625	4,837,611	5,401,203	8,992,350	11,429	20,289,216	6,654,665	13,634,551
Outer Suburbs	134,223	727,361	1,131,193	539,924	6,610	2,539,309	1,137,442	1,401,867

Source: U.S. Dept. of Commerce, Economics and Statistics Administration, Bureau of the Census, Consolidated Federal Funds Report, FY1992.
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 is assigned to the recipient location.

APPENDIX B - Local Government Economic Development Offices

CITY OF ALEXANDRIA, VIRGINIA

Alexandria Economic
Development Program, Inc.
99 Canal Center Plaza
Suite 4 River Level
Alexandria, VA 22314
(703) 739-3820

ARLINGTON COUNTY, VIRGINIA

Economic Development Division
2100 Clarendon Blvd., Rm. 608
Arlington, VA 22201
(703) 358-3520

CITY OF BOWIE, MARYLAND

City of Bowie Department of Planning
and Economic Development
2614 Kenhill Drive
Bowie, MD 20715
(301) 262-6200

CHARLES COUNTY, MARYLAND

Charles County Economic
Development Commission
Box "V"
LaPlata, MD 20646
(301) 932-6066
Metro: (301) 870-2324

DISTRICT OF COLUMBIA

Office of Assistant City Administrator for
Economic Development
441 4th St., N.W., Suite 1140
Washington, DC 20005
(202) 727-6365

FAIRFAX COUNTY, VIRGINIA

Fairfax County Economic
Development Authority
The Americana Center,
Tysons Corner
8300 Boone Blvd., Suite 450
Vienna, VA 22180
(703) 790-0600

CITY OF FALLS CHURCH, VIRGINIA

Economic Development Coordinator
Harry E. Wells Building
300 Park Avenue
Falls Church, VA 22046
(703) 241-5101

FREDERICK COUNTY, MARYLAND

Economic and Community
Development Commission
Winchester Hall
12 East Church Street
Frederick, MD 21701
(301) 694-1058

CITY OF FAIRFAX, VIRGINIA

Economic Development Coordinator
10455 Armstrong Street
Fairfax, VA 22030
(703) 385-7850

LOUDOUN COUNTY, VIRGINIA

Loudoun County Department of Economic
Development
1 Harrison Street, SE - Suite 500
Leesburg, VA 20177
(703) 777-0426
Metro: (703) 478-1850 x426

CITY OF MANASSAS, VIRGINIA

Office of Community Development
9027 Center Street
Manassas, VA 22110
(703) 257-8223

MONTGOMERY COUNTY, MARYLAND

Office of Economic Development
101 Monroe Street, Suite 1500
Rockville, MD 20850
(301) 217-2345

PRINCE GEORGE'S COUNTY, MARYLAND

Prince George's County Economic
Development Corporation
9200 Basil Court, Suite 200
Landover, MD 20785
(301) 386-5600

PRINCE WILLIAM COUNTY, VIRGINIA

Office of Economic Development
4349 Ridgewood Center Dr., Suite 100
Prince William, VA 22192-5308
(703) 631-1480

CITY OF ROCKVILLE, MARYLAND

Economic Development Division
Maryland Avenue & Vinson St.
Rockville, MD 20850
(301) 309-3240

SPOTSYLVANIA COUNTY, VIRGINIA

Office of Economic Development
4704 Southport Parkway
Fredericksburg, VA 22407-2657
(703) 891-2602

STAFFORD COUNTY, VIRGINIA

Economic Development Department
P.O. Box 339
Stafford, VA 22554-0339
(703) 659-8681
Metro: (703) 690-8222 x681

STATE OF MARYLAND

Department of Economic and Employment
Development of Maryland
217 E. Redwood St., 10th Flr.
Baltimore, MD 21202
(410) 767-6795

COMMONWEALTH OF VIRGINIA

Department of Economic Development
2214 Rock Hill Road, Suite 500
Herndon, VA 22071
(703) 689-3058

THE GREATER WASHINGTON INITIATIVE

1129 20th St., N.W.
Suite 200
Washington, DC 20036
(202) 466-4980

**METROPOLITAN WASHINGTON
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777 North Capitol St., N.E. Suite 300
Washington, DC 20002-4226
(202) 962-3282