

Economic Indicators for Montgomery County and Surrounding Jurisdictions

January 2024 Update

Bill 28-17, Human Rights and Civil Liberties – County Minimum Wage – Amount – Annual Adjustment enacted November 7, 2017, phases in increases to the County’s minimum wage so that by 2024 the minimum wage for all businesses operating in the County will be \$15 an hour. Subsequently, the law requires the CAO to adjust the wage to keep pace with inflation, subject to certain economic conditions determined by the Director of Finance.

Bill 28-17 also requires that the Office of Legislative Oversight (OLO) prepare a report to the Council by January 31 of each year “related to implementation of the County minimum wage and the local economy.” The Council wanted a way to monitor how Montgomery County businesses and the County’s economy as a whole may be impacted by the minimum wage increases. The Council envisioned an annual report that could provide an early warning to the Council about any adverse economic changes. Accordingly, in 2019 OLO identified 17 high-level economic indicators that could be used to monitor the County’s economic performance and compare it with the performance of the nine jurisdictions, listed below.

| District of Columbia | Maryland Jurisdictions | Virginia Jurisdictions |
|--|--|--|
| <ul style="list-style-type: none"> • Washington | <ul style="list-style-type: none"> • Anne Arundel County • Baltimore County • Frederick County • Howard County • Prince George’s County | <ul style="list-style-type: none"> • Arlington County • Fairfax County • Loudoun County |

The chart on the next page lists each indicator with its data source, a brief explanation of why the indicator was selected, and the most recent data for Montgomery County. In general, the indicators monitor trends in three areas:

- Community Economic Well-Being and Public Assistance (5 indicators);
- Household and Workplace Economic Activity (5 indicators); and,
- Low-Wage Industry Sectors and Occupational Groups (7 indicators).

These indicators are not meant to measure the effects of the minimum wage; rather, if the County’s indicators begin to diverge from those of the surrounding jurisdictions, the Council may decide additional economic research is warranted.

This report is OLO’s fifth update of the 2019 baseline economic indicators. **Note: Some of the economic indicators in this report compare Calendar Year 2022 or 2023 data with the previous year, and so, reflect the volatile effects of the pandemic on economic conditions.**

According to U.S. Census Bureau data, Montgomery County median household income in 2022 rose 5.0 percent above the 2021 level while the poverty rate for those under 18 decreased to 9.7 percent in 2022, down from 9.7 percent in 2021. In addition, the percentage of County residents receiving

Supplemental Nutrition Assistance Program (SNAP) benefits rose to 7.4 percent in 2021, likely a result of the economic disruptions caused by the pandemic.

The County's unemployment rate dropped from 2.7 percent in 2022 to 1.7 percent in 2023.

Wage and salary employment increased by 2.5 percent from 2021 to 2022 but still remained 14,000 jobs below the 2019 pre-pandemic level.

The Low-Wage Occupational Groups indicator showed gains in the number of jobs in Montgomery County from April 2022 to December 2023. Maryland Department of Labor and Licensing Regulation (DLLR) data for Montgomery County show an increase of 3,360 Food Preparation jobs (up 13.4 percent); Building and Grounds and Cleaning and Maintenance jobs increased by 200 jobs (up 1.3 percent); and the number of Personal Care and Service jobs in the County rose by 590 (up 5.4 percent). The same data set shows that entry level and median wages for these occupational groups increased over the same time period in Montgomery County. Median wages increased by \$1.31 per hour (9.2 percent) for Food Preparation jobs; increased by \$1.00 per hour (6.2 percent) for Building and Grounds and Cleaning and Maintenance jobs; and increased by \$1.35 per hour (9.2 percent) for Personal Care and Service jobs.

SUMMARY OF OLO ECONOMIC INDICATORS FOR MONTGOMERY COUNTY

| # | (Change from prior year) * | Data Source | Significance/Rationale | Most recent County datapoint | Change from previous year |
|---|----------------------------|-------------|------------------------|------------------------------|---------------------------|
|---|----------------------------|-------------|------------------------|------------------------------|---------------------------|

INDICATORS OF COMMUNITY ECONOMIC WELL-BEING AND PUBLIC ASSISTANCE

| | | | | | |
|---|---|---------------------------------|---|-----------|------|
| 1 | Total County Population | BEA, Commerce | Provides a basis for benchmarking. | 1,052,251 | DOWN |
| 2 | Total Population as a Percentage of State Population | BEA, Commerce | Provides a basis for benchmarking. | 17.1% | FLAT |
| 3 | Median Household Income | SAIPE, Census | Provides measure of economic well-being. | \$118,020 | UP |
| 4 | Poverty Rate for Children Under 18 | SAIPE, Census | Percentage of children in households with incomes below federal poverty thresholds measures families facing economic hardship. | 9.7% | DOWN |
| 5 | Percentage of Residents Receiving Supplemental Nutrition Assistance Program (SNAP) benefits | SAIPE, Census and BEA, Commerce | SNAP eligibility is household income <130 percent of the federal poverty threshold. The resident percent measures need for public assistance, although changes in eligibility rules may lessen this connection. | 7.4% | UP |

INDICATORS OF HOUSEHOLD AND WORKPLACE ECONOMIC ACTIVITY

| | | | | | |
|----|---|---------------|---|---------|------|
| 6 | Resident Civilian Labor Force (Employed plus unemployed) | LAUS, BLS | Measure of a community's potential working adult population. | 548,457 | UP |
| 7 | Resident Unemployment Rate | LAUS, BLS | Percentage of adults age 16 and over looking for work measures local economic health and opportunity. | 1.7% | DOWN |
| 8 | Total Workplace Employment (Employees plus Self-Employed Contractors) | BEA, Commerce | Sole proprietorships and employees of local private businesses, nonprofits or public agencies broadly measures economic opportunity and well-being. | 741,956 | UP |
| 9 | Wage and Salary Employment (Number of full-time and part-time jobs, by workplace) | BEA, Commerce | Measures changes in economic opportunity. | 506,550 | UP |
| 10 | Number of Private Establishments | QCEW, BLS | Measures changes in economic activity. | 34,513 | UP |

INDICATORS FOR LOW-WAGE INDUSTRY SECTORS AND OCCUPATIONAL GROUPS

| | | | | | |
|----|--|-----------|---|-----------|-----------------------|
| 11 | Retail Trade: Workplace Employment | BEA | Measures economic activity for an industry sector with a high percentage of minimum wage workers. | 52,622 | UP |
| 12 | Retail Trade: Employee Compensation | BEA | Measures economic activity for an industry sector with a high percentage of minimum wage workers. | \$2.29B | UP |
| 13 | Retail Trade: Number of Establishments | QCEW, BLS | Measures economic activity for an industry sector with a high percentage of minimum wage workers. | 2,373 | DOWN |
| 14 | Accommodations & Food Services: Workplace Employment | BEA | Measures economic activity for an industry sector with a high percentage of minimum wage workers. | 35,809 | UP |
| 15 | Accommodations & Food Services: Employee Compensation | BEA | Measures economic activity for an industry sector with a high percentage of minimum wage workers. | \$1.37B | UP |
| 16 | Accommodations & Food Services: Number of Establishments | QCEW, BLS | Measures economic activity for an industry sector with a high percentage of minimum wage workers. | 1,930 | UP |
| 17 | Maryland Employment and Wages by Major Occupational Group: Entry, mean, and median wages | DLLR | Measures wages for three occupational groups with a high percentage of minimum wage workers. | (various) | Jobs: UP Wages: UP |

Office of Legislative Oversight Report 2024-3

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Chapter 1. Authority, Scope, Methodology, and Acknowledgements

Authority

OLO prepared this report at the request of the Montgomery County Council under the following authorizations:

- Bill No. 28-17 (Sec. 27-70A), *Concerning: Human Rights and Civil Liberties – County Minimum Wage – Amount – Annual Adjustment*, enacted Nov. 7, 2017, and effective July 1, 2018.
- Council Resolution 19-1331, *Fiscal Year 2023 Work Program of the Office of Legislative Oversight*, adopted July 26, 2022.

Purpose, Scope, and Methodology

Montgomery County Code Sec. 27-70A requires that OLO provide to the Council, by January 31 of each year, a report containing data related to the implementation of the County minimum wage and the local economy. To fulfill that requirement, in 2019 OLO assembled a set of 17 economic indicators for Montgomery County and compared them with eight counties in the surrounding area, Washington, D.C., and the nation where applicable. This report updates those indicators as previously published in January 2019, January 2020, January 2021, January 2022, and January 2023. If County trends for individual indicators diverge from surrounding areas or the nation over time, the Council may seek additional analysis to explain possible causes.

This report is organized as follows:

Chapter 2 provides a brief history of federal, state, and local minimum wage rates and lists the current minimum wage rate for Montgomery County, surrounding jurisdictions, and the State of Maryland.

Chapter 3 presents economic indicators with the following components: a definition of the indicator, an explanation of how the indicator could relate to minimum wage rates, the data source, a data figure, and a data table.

OLO used the following criteria to select economic indicators for this report series:

- Data are collected and published by a reliable government source.
- Data are updated predictably and regularly to allow for comparisons over time.
- Data are available for individual counties, as well as larger statistical areas and the nation, to allow for comparisons between jurisdictions.

OLO gathered information from the following federal statistical agencies.¹

- Bureau of Labor Statistics (BLS), within the U.S. Department of Labor. BLS' Quarterly Census of Employment and Wages (QCEW) derives data on employment and wages from tabulations of

monthly employment and quarterly total wages of workers covered by state unemployment insurance programs and the unemployment compensation for federal employees.

- Bureau of Economic Analysis (BEA), within the U.S. Department of Commerce. BEA uses BLS' QCEW data on employment, wages, and salaries, with additional adjustments to account for employment not covered by public unemployment insurance (such as farm labor contractors, and employees of private schools).
- Bureau of the Census (Census Bureau), within the U.S. Department of Commerce. In addition to the decennial census and quinquennial economic census, the Census Bureau conducts more frequent surveys that collect employment and payroll data.

The U.S. Office of Management and Budget (OMB) defines the industry categories, occupational groups, and geographic statistical areas used by federal statistical agencies.

Federal statistical agencies report data on the U.S. economy using the North American Industry Classification System (NAICS), categorizing the economy into 20 industry sectors. Economic indicators in this report focus on two industry sectors likely to employ workers with wages low enough to be affected by the higher minimum wage: Retail Trade (NAICS Sector 44-45), and Accommodation and Food Services (NAICS Sector 72).

Federal statistical agencies also report economic data using the Standard Occupational Classification (SOC) system, categorizing workers into 23 major occupational groups. Every industry sector employs workers from many occupational groups, and workers in any occupational group are employed across industry sectors. This report provides economic indicators for three major occupational groups that typically have occupations with lower wages.²

Economic data tabulated at the local level for an industry sector and/or an occupational group can sometimes be too specific to avoid disclosure of confidential business information. In these cases, federal statistical agencies publish economic data only for a larger area.

Throughout this report, unless otherwise indicated, all years refer to calendar years.

This 2024 update was prepared by Aron Trombka, Senior Legislative Analyst.

Chapter 2. Minimum Wage Rates in Montgomery County and Surrounding Jurisdictions

This chapter provides a brief overview of federal, state, and Montgomery County minimum wage rates.

Federal Minimum Wage

The U.S. Fair Labor Standards Act (FLSA) of 1938 first established a federal minimum hourly wage rate. Since 1938, the FLSA has been amended dozens of times to raise the rate and/or expand the workers covered by the law. The last rate increase was in 2007 when the federal minimum wage was set at its current level of \$7.25 per hour. FLSA covers most, but not all, employees in the public and private sectors. FLSA includes exemptions that allow subminimum wages for some classes of workers.

State of Maryland Minimum Wage

States may set labor standards that are more protective of employees than federal statutes. Most states and the District of Columbia have a minimum wage above the federal minimum rate of \$7.25 per hour. Maryland has had an established state minimum wage since the 1960s. The Maryland Minimum Wage Act of 2014 enacted a multi-year phase-in of higher state rates through July 1, 2018. In March 2019, Maryland enacted a new set of scheduled increases to the state minimum wage rate. Effective June 1, 2019, Senate Bill 280/House Bill 166 incrementally increases the state minimum wage rate over a multiyear period. On January 1, 2023, the state rate became \$13.25 per hour for employers with 15 or more employees and \$12.80 for employers with 14 or fewer employees. On January 1, 2024, the rate increased to \$15.00 per hour for all employers.³

Montgomery County Minimum Wage

In 2013, the County enacted a local minimum wage rate higher than the Maryland (and federal) rates. Bill 27-13 increased wage rates over a three-year period from an initial rate of \$8.40 per hour (effective October 1, 2014) to a final rate of \$11.50 per hour (effective July 1, 2017). In 2017, Montgomery County enacted a new set of scheduled increases to the minimum wage rate, contingent on certain economic conditions. Bill 28-17 increased wage rates over several years. Small, mid-size, and large employers have different schedules to eventually reach \$15.00 per hour. When rates reach \$15.00 per hour, increases are indexed with inflation. Table 2-1 outlines the County's rate schedule.⁴

Table 2-1. Montgomery County Hourly Minimum Wage Transition Schedule

| Date | Large Employers (50+ employees) | Mid-Sized Employers (11-50 employees) | Small Employers (10 or fewer employees) |
|----------|------------------------------------|--|--|
| 7/1/2021 | \$15.00 | \$14.00 | \$13.50 |
| 7/1/2022 | \$15.00 + Inflation | \$14.50 | \$14.00 |
| 7/1/2023 | 2022 rate + Inflation | \$15.00 | \$14.50 |
| 7/1/2024 | 2023 rate + Inflation | \$15.00 + Inflation + Adjustment* | \$15.00 |
| 7/1/2025 | 2024 rate + Inflation | 2024 rate + Inflation + Adjustment* | \$15.00 + Inflation + Adjustment* |

* The minimum wage adjusts annually (beginning in 2024 for mid-sized employers and in 2025 for small employers) by the annual average increase, if any, in the CPI-W for the previous calendar year plus, if the CPI-W increase is less than \$0.50, one percent of the minimum wage required for the prior year, up to a total increase of \$0.50.

In 2018, Montgomery County enacted Bill 34-18, Human Rights and Civil Liberties – County Minimum Wage – Definitions – Employer, to apply the County minimum wage to any entity that employs one or more persons in the County in addition to the owners.

Table 2-2 displays scheduled minimum wage rate increases for Montgomery County, the State of Maryland, surrounding jurisdictions, and the nation.

Table 2-2. Statutory Minimum Wage Rate Per Hour, by Jurisdiction⁵

| | 7/1/2019 | 7/1/2020 | 7/1/2021 | 7/1/2022 | 7/1/2023 | 7/1/2024 |
|---------------------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|------------------------|
| Federal Government ⁶ | \$7.25 | \$7.25 | \$7.25 | \$7.25 | \$7.25 | \$7.25 |
| District of Columbia ⁷ | \$14.00 | \$15.00 | \$15.20 | \$16.10 | \$17.00 | prior year + inflation |
| State of Virginia | \$7.25 | \$7.25 | \$9.50 | \$11.00 | \$12.00 | \$12.00 |
| Montgomery County, MD: | | | | | | |
| Large Employers (51+ employees) | \$13.00 | \$14.00 | \$15.00 | \$15.65 | \$16.70 | prior year + inflation |
| Mid-sized Employers (11-50 employees) | \$12.50 | \$13.25 | \$14.00 | \$14.50 | \$15.00 | prior year + inflation |
| Small Employers (<10 employees) | \$12.50 | \$13.00 | \$13.50 | \$14.00 | \$14.50 | \$15.00 |
| State of Maryland: ⁸ | | | | | | |
| Large Employers (15+ employees) | \$10.10 | \$11.00 | \$11.75 | \$12.50 | \$13.25 | \$15.00 |
| Small Employers (<15 employees) | \$10.10 | \$11.00 | \$11.60 | \$12.20 | \$12.80 | \$15.00 |
| Anne Arundel County, MD* | State rates apply |
| Baltimore County, MD* | State rates apply |
| Carroll County, MD* | State rates apply |
| Frederick County, MD* | State rates apply |
| Howard County, MD* | State rates apply |
| Prince George’s County, MD* | \$11.50 | \$11.50 | State rates apply | State rates apply | State rates apply | State rates apply |

*County uses Maryland minimum wage rates.

Chapter 3. Economic Indicators

Montgomery County Code Sec. 27-70A requires that OLO provide to the Council, by January 31 of each year, a report containing data related to the implementation of the County minimum wage and the local economy.^{9,10} To fulfill that requirement, OLO developed a set of 17 economic indicators for Montgomery County and compared them with eight counties in the surrounding area plus Washington, D.C. and the nation where applicable. The indicators in this report update those published in January 2023.¹¹ OLO cautions that these indicators, by themselves, are not meant to measure the effects of the minimum wage; rather, if the County's indicators begin to diverge from those of the surrounding jurisdictions, the Council may decide additional economic research is warranted.

OLO's presentation of each indicator includes: a definition of the indicator, an explanation of how the indicator could relate to minimum wage rates, the data source, a data figure, and a data table. The economic indicators OLO selected reflect tradeoffs that arose because of the criteria described in Chapter 1. For example, although workplace wage data for specific low-wage occupations would have been a useful indicator, the BLS provides this data for metropolitan divisions but not for counties. While the Maryland Department of Labor, Licensing and Regulation (DLLR) provides more specific occupational data at the county level, DLLR advises that it should not be used in a time series.

OLO gathered data from the following federal statistical agencies¹²:

- Bureau of Labor Statistics (BLS), within the U.S. Department of Labor. BLS' Quarterly Census of Employment and Wages (QCEW) derives data on employment and wages from tabulations of monthly employment and quarterly total wages of workers covered by state unemployment insurance programs and the unemployment compensation for federal employees.
- Bureau of Economic Analysis (BEA), within the U.S. Department of Commerce. BEA uses BLS' QCEW data on employment, wages and salaries, with additional adjustments to account for employment not covered by public unemployment insurance (such as farm labor contractors, and employees of private schools).¹³
- Bureau of the Census, within the U.S. Department of Commerce. In addition to the decennial census and quinquennial economic census, the Census Bureau conducts more frequent surveys that collect employment and payroll data.

The U.S. Office of Management and Budget (OMB) defines the industry categories, occupational groups, and geographic statistical areas used by federal statistical agencies.

Federal statistical agencies report data on the U.S. economy using the North American Industry Classification System (NAICS), categorizing the economy into 20 industry sectors. Economic indicators in this report focus on two industry sectors likely to employ low-wage workers: Retail Trade (NAICS Sector 44-45), and Accommodation and Food Services (NAICS Sector 72). Note that economic data tabulated at a local level for an industry sector can sometimes be too specific to avoid disclosure of

confidential business information, as indicated with a notation (D) in the data tables. In these cases, federal statistical agencies publish economic data only for a larger area.

Federal statistical agencies also report economic data using the Standard Occupational Classification (SOC) system, categorizing workers into 23 major occupational groups. Every industry sector employs workers from many occupational groups, and workers in any major occupational group are employed across industry sectors. This report provides economic indicators for three major occupational groups that typically include occupations with lower wages¹⁴:

- Food Preparation and Serving-Related Occupations (SOC code 35-0000);
- Building and Grounds Cleaning and Maintenance Occupations (SOC code 37-0000); and
- Personal Care and Service Occupations (SOC code 39-0000).

The occupational employment statistics (OES) survey data are provided for selected Maryland workforce regions, as reported by the Maryland DLLR.

Economic Indicators #1 and #2: Population (Total Number) and Population as a Percentage of State

Definition:

Population represents the number of individuals (both civilian and military) of all ages who reside in a given area.

Indicators' relationship to the local economy and the minimum wage:

This report begins with two population indicators to give context to the subsequent economic indicators and facilitate comparison between jurisdictions of different population sizes. Population and the economy can be interrelated. For example, some economists have argued that the co-location of related economic activities and assets in more densely populated cities amplifies economic activity and innovation.¹⁵

Figure 3-1 depicts data for the total population (all ages) of Montgomery County and surrounding jurisdictions in the region for the 2007-2022 period.

Figure 3-2 depicts changing percentages of the state's population for Montgomery County, five other Maryland counties and the City of Baltimore for the 2007-2022 period.

As of 2022, Montgomery County had a total population of approximately 1.05 million. The County has the largest population among Maryland counties, and accounts for 17.1 percent of Maryland's total population. The County's population grew steadily over the 2006-2020 period but experienced a decline of 0.3 percent (3,400 residents) from 2020 to 2021.

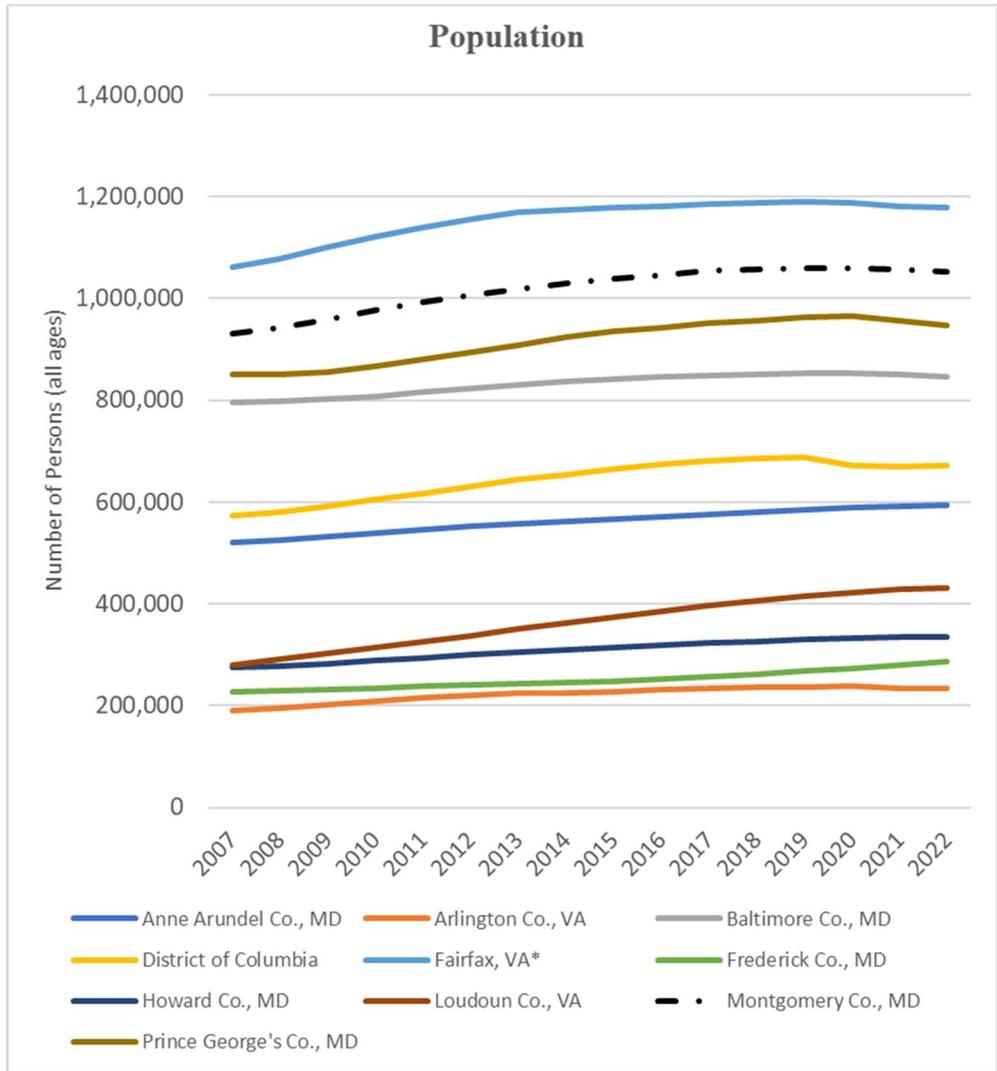
Current data and trends:

The data in Table 3-1 show that most jurisdictions in the region experienced less than a one percent change in population from 2021 to 2022. The largest population increase occurred in Frederick County (up 2.4 percent); the largest decrease occurred in Prince George's County (down 1.0 percent). The State of Maryland also experienced a population decline (down 0.2 percent) from 2021 to 2022.

Source of data:

Regional Economic Accounts, Bureau of Economic Analysis (BEA), U.S. Department of Commerce.¹⁶ BEA's data comes from Census Bureau midyear population estimates. Estimates for 2010-2020 reflect county population estimates available as of November 2023.

Figure 3-1. Population, 2007-2022.



*BEA modifies the FIPS Codes to combine Fairfax County (FIPS 51059), Fairfax City (FIPS 51600) and Falls Church (FIPS 51610) into a single FIPS Code 51919. Separate estimates for the jurisdictions making up 51919 are not available.

Data source: Regional Economic Accounts, Bureau of Economic Analysis (BEA), U.S. Department of Commerce.

Table 3-1. Population, 2007-2022.

Population (Number of persons) 1/

Source: Regional Economic Data (CAINC1), Bureau of Economic Analysis, U.S. Department of Commerce

| FIPS | Name | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------|---------------------------|----------------|----------------|----------------|----------------|----------------|------------------|------------------|------------------|
| 24003 | Anne Arundel Co., MD | 520,503 | 525,304 | 532,395 | 539,453 | 545,610 | 551,832 | 557,604 | 561,995 |
| 51013 | Arlington Co., VA | 190,759 | 196,305 | 202,637 | 209,293 | 215,943 | 221,365 | 224,754 | 225,792 |
| 24005 | Baltimore Co., MD | 796,073 | 798,651 | 801,808 | 807,307 | 816,320 | 824,205 | 831,114 | 836,593 |
| 11000 | District of Columbia | 574,404 | 580,236 | 592,228 | 604,795 | 617,794 | 631,132 | 644,755 | 654,557 |
| 51919 | Fairfax, VA* | 1,060,356 | 1,077,509 | 1,099,347 | 1,121,179 | 1,138,607 | 1,156,467 | 1,168,505 | 1,173,146 |
| 24021 | Frederick Co., MD | 227,463 | 229,286 | 230,942 | 234,405 | 238,172 | 241,244 | 243,449 | 246,433 |
| 24027 | Howard Co., MD | 275,196 | 278,405 | 283,061 | 288,722 | 294,123 | 300,187 | 304,998 | 308,843 |
| 51107 | Loudoun Co., VA | 279,704 | 292,570 | 303,661 | 315,487 | 326,360 | 337,909 | 350,009 | 362,340 |
| 24031 | Montgomery Co., MD | 931,694 | 942,748 | 959,013 | 975,856 | 992,526 | 1,007,497 | 1,018,706 | 1,029,222 |
| 24033 | Prince George's Co., MD | 849,916 | 850,167 | 856,161 | 867,724 | 881,089 | 894,632 | 908,318 | 923,267 |

| | | | | | | | | | |
|-------|----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| 24000 | Maryland | 5,653,408 | 5,684,965 | 5,730,388 | 5,791,559 | 5,854,282 | 5,913,919 | 5,962,350 | 6,008,975 |
| 51000 | Virginia | 7,751,000 | 7,833,496 | 7,925,937 | 8,025,030 | 8,107,628 | 8,196,915 | 8,269,638 | 8,333,578 |

| FIPS | Name | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|--------------|---------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 24003 | Anne Arundel Co., MD | 566,320 | 571,245 | 575,799 | 580,715 | 585,606 | 589,054 | 592,052 | 593,286 |
| 51013 | Arlington Co., VA | 228,283 | 231,078 | 234,337 | 235,683 | 237,280 | 238,799 | 233,574 | 234,000 |
| 24005 | Baltimore Co., MD | 841,912 | 845,780 | 848,498 | 850,780 | 853,436 | 853,325 | 850,634 | 846,161 |
| 11000 | District of Columbia | 665,633 | 673,833 | 680,945 | 685,632 | 687,408 | 670,868 | 668,791 | 671,803 |
| 51919 | Fairfax, VA* | 1,177,517 | 1,181,265 | 1,186,137 | 1,186,528 | 1,189,209 | 1,187,410 | 1,180,582 | 1,177,752 |
| 24021 | Frederick Co., MD | 248,808 | 251,668 | 256,219 | 261,703 | 267,471 | 272,765 | 280,410 | 287,079 |
| 24027 | Howard Co., MD | 313,735 | 318,371 | 322,678 | 326,647 | 330,188 | 332,786 | 335,287 | 335,411 |
| 51107 | Loudoun Co., VA | 374,185 | 385,764 | 397,207 | 405,982 | 414,881 | 422,669 | 428,435 | 432,085 |
| 24031 | Montgomery Co., MD | 1,038,524 | 1,045,476 | 1,054,403 | 1,056,926 | 1,060,230 | 1,060,230 | 1,055,924 | 1,052,521 |
| 24033 | Prince George's Co., MD | 935,295 | 943,423 | 950,736 | 956,772 | 962,586 | 965,290 | 956,254 | 946,971 |

| | | | | | | | | | |
|-------|----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| 24000 | Maryland | 6,049,289 | 6,079,669 | 6,112,835 | 6,138,786 | 6,163,628 | 6,173,205 | 6,174,610 | 6,164,660 |
| 51000 | Virginia | 8,389,864 | 8,444,688 | 8,502,578 | 8,547,016 | 8,597,339 | 8,636,471 | 8,657,365 | 8,683,619 |

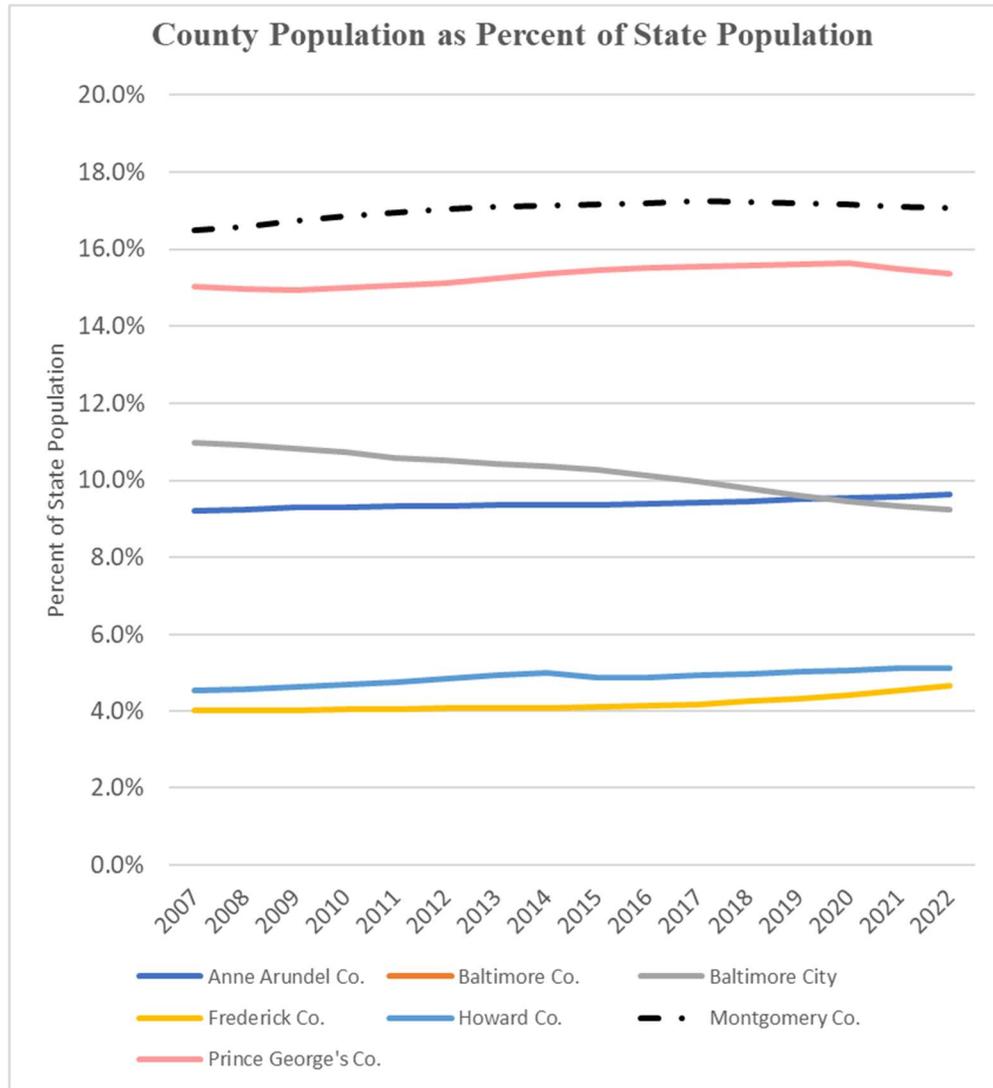
Legend / Footnotes:

1/ Census Bureau midyear population estimate. BEA produced intercensal annual county population statistics for 2010 to 2019 that are tied to the Census Bureau decennial counts for 2010 and 2020.

* Virginia combination areas consist of one or two independent cities with 1980 populations of less than 100,000 combined with an adjacent county. BEA modifies the FIPS Codes to combine Fairfax County (FIPS 51059), Fairfax City (FIPS 51600) and Falls Church (FIPS 51610) into a single FIPS Code 51919. Separate estimates for the jurisdictions making up 51919 are not available.

Last updated: November 16, 2023- new statistics for 2022; revised statistics for 2007-2021

Figure 3-2. County Population as a Percentage of State Population, 2007-2022.



Data source: Regional Economic Accounts, Bureau of Economic Analysis (BEA), U.S. Department of Commerce.

Table 3-2. County Population as a Percentage of State Population, 2007-2022.

Population as Percent of State Population 1/

Source: Regional Economic Data (CAINC1), Bureau of Economic Analysis, U.S. Department of Commerce

| FIPS | Name | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 24003 | Anne Arundel Co. | 9.2% | 9.2% | 9.3% | 9.3% | 9.3% | 9.3% | 9.4% | 9.4% |
| 24510 | Baltimore City | 11.0% | 10.9% | 10.8% | 10.7% | 10.6% | 10.5% | 10.4% | 10.4% |
| 24005 | Baltimore Co. | 14.1% | 14.0% | 14.0% | 13.9% | 13.9% | 13.9% | 13.9% | 13.9% |
| 24021 | Frederick Co. | 4.0% | 4.0% | 4.0% | 4.0% | 4.1% | 4.1% | 4.1% | 4.1% |
| 24027 | Howard Co. | 4.5% | 4.6% | 4.6% | 4.7% | 4.8% | 4.9% | 4.9% | 5.0% |
| 24031 | Montgomery Co. | 16.5% | 16.6% | 16.7% | 16.8% | 17.0% | 17.0% | 17.1% | 17.1% |
| 24033 | Prince George's Co. | 15.0% | 15.0% | 14.9% | 15.0% | 15.1% | 15.1% | 15.2% | 15.4% |

| FIPS | Name | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|--------------|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 24003 | Anne Arundel Co. | 9.4% | 9.4% | 9.4% | 9.5% | 9.5% | 9.5% | 9.6% | 9.6% |
| 24510 | Baltimore City | 10.3% | 10.1% | 10.0% | 9.8% | 9.6% | 9.4% | 9.3% | 9.2% |
| 24005 | Baltimore Co. | 13.9% | 13.9% | 13.9% | 13.9% | 13.8% | 13.8% | 13.8% | 13.7% |
| 24021 | Frederick Co. | 4.1% | 4.1% | 4.2% | 4.3% | 4.3% | 4.4% | 4.5% | 4.7% |
| 24027 | Howard Co. | 4.9% | 4.9% | 4.9% | 5.0% | 5.0% | 5.1% | 5.1% | 5.1% |
| 24031 | Montgomery Co. | 17.2% | 17.2% | 17.2% | 17.2% | 17.2% | 17.2% | 17.1% | 17.1% |
| 24033 | Prince George's Co. | 15.5% | 15.5% | 15.6% | 15.6% | 15.6% | 15.6% | 15.5% | 15.4% |

Legend / Footnotes:

1/ Census Bureau midyear population estimate. BEA produced intercensal annual county population statistics for 2010 to 2019 that are tied to the Census Bureau decennial counts for 2010 and 2020.

Last updated: November 16, 2023- new statistics for 2022; revised statistics for 2007-2021

Economic Indicator #3: Median Household Income

Definition:

Median household income (MHI) represents the annual income amount for which one-half of all households in a defined area have income above that level and the other half below. The U.S. Census Bureau determines the MHI for a defined geographic area based on the income of all households in that area, including those with no income. The Census Bureau defines a household as all of the people who occupy a housing unit, including all related family members as well as unrelated people such as household employees. A person who lives alone is counted as a household. The definition of household income includes all sources received by all household members during the previous calendar year. Common sources of income are salaries and wages, interest, dividends, rent, alimony and child support.

Indicator's relationship to the local economy and the minimum wage:

Studies of economic trends often include measures of household income because they can provide a broadly defined measure of an area's economic well-being. Household income for a defined area can be represented as a distribution, a mean, or a median. The median is useful because it is less affected by outliers such as a small number of households with exceptionally high income.

MHI in an area can change due to many factors, including changes in the minimum wage rate. A change in MHI can also be affected by changes in household size or living arrangements. For example, young people who continue to live at home with their parents could both slow the rate of new household formations and increase the household income. Other factors that could affect MHI include: changes in the overall mix of younger and older households; an increase in elderly households on fixed incomes due to the aging of the population; wage stagnation (e.g., increased automation reducing demand for labor); changing family patterns that could affect the number of wage earners (e.g., an increase in single parent households); and the overall state of the regional and national economy.

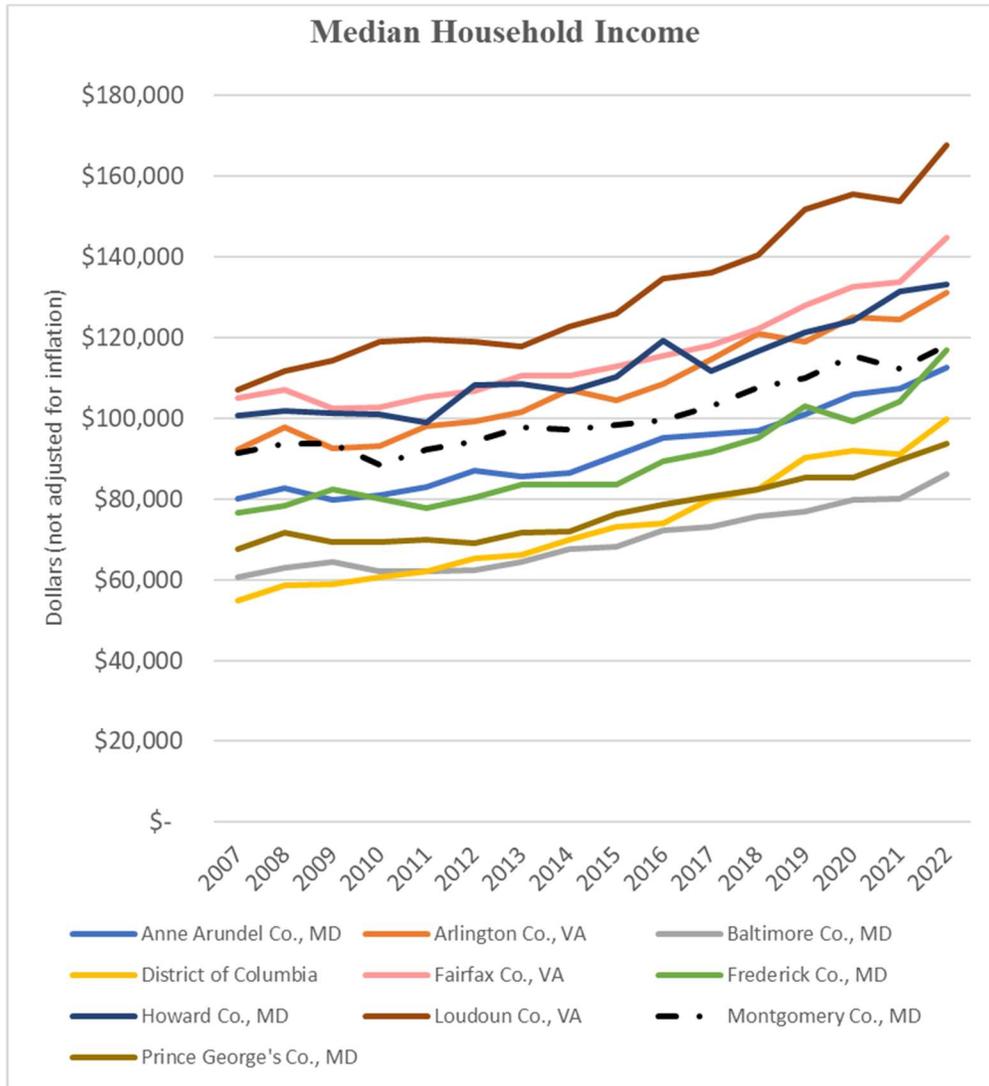
Current data and trends:

Figure 3-3 and Table 3-3 display Medium Household Income (MHI) data for 2007-2022. A comparison of the most recent three years of data shows Montgomery County's MHI declined 2.6 percent (from \$115,394 to \$112,352) from 2020 to 2021, likely a result of the pandemic's effect on the economy. However, in 2022, the County's MHI rebounded to \$118,020, a 5.0 percent increase. All jurisdictions in this survey saw their 2022 MHI exceed pre-pandemic levels.

Source of data:

Small Area Income and Poverty Estimates (SAIPE), Census Bureau, U.S. Department of Commerce.¹⁷

Figure 3-3. Median Household Income, 2007-2022.



Data source: Small Area Income and Poverty Estimates (SAIPE), Census Bureau, U.S. Department of Commerce.

Table 3-3. Median Household Income, 2007-2022.

Median Household Income (in Dollars)

Source: Small Area Income and Poverty Estimates (SAIPE), Census Bureau, U.S. Department of Commerce

| FIPS | Name | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------|---------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 24003 | Anne Arundel Co., MD | \$ 80,158 | \$ 82,616 | \$ 79,843 | \$ 80,908 | \$ 82,980 | \$ 87,083 | \$ 85,685 | \$ 86,654 |
| 51013 | Arlington Co., VA | \$ 92,345 | \$ 97,871 | \$ 92,703 | \$ 93,231 | \$ 98,060 | \$ 99,255 | \$ 101,533 | \$ 107,143 |
| 24005 | Baltimore Co., MD | \$ 60,828 | \$ 63,078 | \$ 64,629 | \$ 62,300 | \$ 62,309 | \$ 62,413 | \$ 64,624 | \$ 67,766 |
| 11000 | District of Columbia | \$ 54,812 | \$ 58,553 | \$ 58,906 | \$ 60,729 | \$ 62,087 | \$ 65,231 | \$ 66,326 | \$ 69,992 |
| 51059 | Fairfax Co., VA | \$ 104,984 | \$ 107,075 | \$ 102,325 | \$ 102,726 | \$ 105,409 | \$ 106,690 | \$ 110,658 | \$ 110,507 |
| 24021 | Frederick Co., MD | \$ 76,802 | \$ 78,437 | \$ 82,598 | \$ 80,216 | \$ 77,872 | \$ 80,427 | \$ 83,489 | \$ 83,698 |
| 24027 | Howard Co., MD | \$ 100,744 | \$ 101,867 | \$ 101,417 | \$ 100,992 | \$ 99,040 | \$ 108,234 | \$ 108,503 | \$ 106,871 |
| 51107 | Loudoun Co., VA | \$ 107,200 | \$ 111,582 | \$ 114,200 | \$ 119,075 | \$ 119,525 | \$ 118,934 | \$ 117,680 | \$ 122,641 |
| 24031 | Montgomery Co., MD | \$ 91,440 | \$ 93,895 | \$ 93,774 | \$ 88,559 | \$ 92,288 | \$ 94,365 | \$ 97,873 | \$ 97,279 |
| 24033 | Prince George's Co., MD | \$ 67,706 | \$ 71,696 | \$ 69,545 | \$ 69,524 | \$ 70,114 | \$ 69,258 | \$ 71,682 | \$ 71,904 |

| | | | | | | | | | |
|-------|---------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| 24000 | Maryland | \$ 67,989 | \$ 70,482 | \$ 69,193 | \$ 68,933 | \$ 70,075 | \$ 71,169 | \$ 72,482 | \$ 73,851 |
| 51000 | Virginia | \$ 59,575 | \$ 61,210 | \$ 59,372 | \$ 60,665 | \$ 61,877 | \$ 61,782 | \$ 62,745 | \$ 64,923 |
| 0 | United States | \$ 50,740 | \$ 52,029 | \$ 50,221 | \$ 50,046 | \$ 50,502 | \$ 51,371 | \$ 52,250 | \$ 53,657 |

| FIPS | Name | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|--------------|---------------------------|------------------|------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| 24003 | Anne Arundel Co., MD | \$ 90,825 | \$ 95,297 | \$ 96,133 | \$ 97,051 | \$ 100,916 | \$ 105,979 | \$ 107,281 | \$ 112,525 |
| 51013 | Arlington Co., VA | \$ 104,354 | \$ 108,635 | \$ 114,705 | \$ 120,950 | \$ 118,986 | \$ 125,004 | \$ 124,474 | \$ 131,020 |
| 24005 | Baltimore Co., MD | \$ 68,317 | \$ 72,305 | \$ 73,309 | \$ 75,836 | \$ 76,972 | \$ 79,974 | \$ 80,159 | \$ 86,198 |
| 11000 | District of Columbia | \$ 73,115 | \$ 74,093 | \$ 80,153 | \$ 82,533 | \$ 90,395 | \$ 91,957 | \$ 91,072 | \$ 99,897 |
| 51059 | Fairfax Co., VA | \$ 112,844 | \$ 115,518 | \$ 117,989 | \$ 122,035 | \$ 127,898 | \$ 132,509 | \$ 133,845 | \$ 144,632 |
| 24021 | Frederick Co., MD | \$ 83,746 | \$ 89,541 | \$ 91,727 | \$ 95,196 | \$ 102,951 | \$ 99,254 | \$ 104,253 | \$ 116,796 |
| 24027 | Howard Co., MD | \$ 110,224 | \$ 119,386 | \$ 111,576 | \$ 116,719 | \$ 121,329 | \$ 124,042 | \$ 131,412 | \$ 133,068 |
| 51107 | Loudoun Co., VA | \$ 125,900 | \$ 134,609 | \$ 136,191 | \$ 140,382 | \$ 151,806 | \$ 155,362 | \$ 153,716 | \$ 167,505 |
| 24031 | Montgomery Co., MD | \$ 98,314 | \$ 99,604 | \$ 102,944 | \$ 107,758 | \$ 110,012 | \$ 115,394 | \$ 112,352 | \$ 118,020 |
| 24033 | Prince George's Co., MD | \$ 76,366 | \$ 78,680 | \$ 80,858 | \$ 82,445 | \$ 85,357 | \$ 85,246 | \$ 89,689 | \$ 93,833 |

| | | | | | | | | | |
|-------|---------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| 24000 | Maryland | \$ 75,784 | \$ 78,787 | \$ 80,711 | \$ 83,076 | \$ 86,644 | \$ 88,589 | \$ 90,129 | \$ 94,957 |
| 51000 | Virginia | \$ 66,263 | \$ 68,127 | \$ 71,518 | \$ 72,600 | \$ 76,471 | \$ 79,154 | \$ 80,926 | \$ 85,838 |
| 0 | United States | \$ 53,657 | \$ 55,775 | \$ 57,617 | \$ 60,336 | \$ 61,937 | \$ 65,712 | \$ 67,340 | \$ 74,755 |

Economic Indicator #4: Poverty Rate for Persons Under Age 18

Definition:

Poverty can be defined using an absolute or a relative measure. Federal statistical agencies use a table of Federal Poverty Thresholds (FPTs) to calculate poverty statistics. FPTs vary by family size, number of related children, and age of householder, but not by geographic region of the country. The Census Bureau updates the FPTs annually to reflect changes in the cost of living.

The Census Bureau determines poverty status by comparing a household's total annual before-tax income to the FPTs applicable to that household. Sources of income include wages, salaries, social security, pensions, alimony, child support, and public assistance. The value of noncash benefits such as housing subsidies, Medicaid, or SNAP (Food Stamp) benefits are not counted as household income.

If household income is below the FPT, then the household is considered to be in poverty. All family members in a household, including any children under age 18, have the same poverty status. For individuals not living in families, poverty status is determined by comparing the individual's total income to their FPT. The 2022 FPT for a family of four with two children under age 18 was \$29,678; the 2020 FPT for a single person under age 65 was \$15,225.¹⁸ Because retirees or elderly households with fixed incomes below the FPT would be unaffected by minimum wage laws, this indicator uses the poverty rate for children under age 18, which reflects the poverty status for all household members.¹⁹

The poverty rate for people under age 18 is based on an annual household survey conducted by the Census Bureau to provide poverty estimates for counties and school districts.

Current data and trends:

Table 3-4 shows that Montgomery County's poverty rate for people under age 18 was 9.7 percent in 2022. In the region, the highest 2022 poverty rate for people under age 18 was in the District of Columbia (20.0 percent) and the lowest was in Loudoun County (3.7 percent). The 2022 rate in Montgomery County fell below the Maryland statewide rate of 12.1 percent. All regional jurisdictions with the exception of Baltimore County experienced a decrease in the poverty rate from 2021 to 2022 as the effect of the pandemic on the economy lessened.

Indicator's relationship to the local economy and the minimum wage:

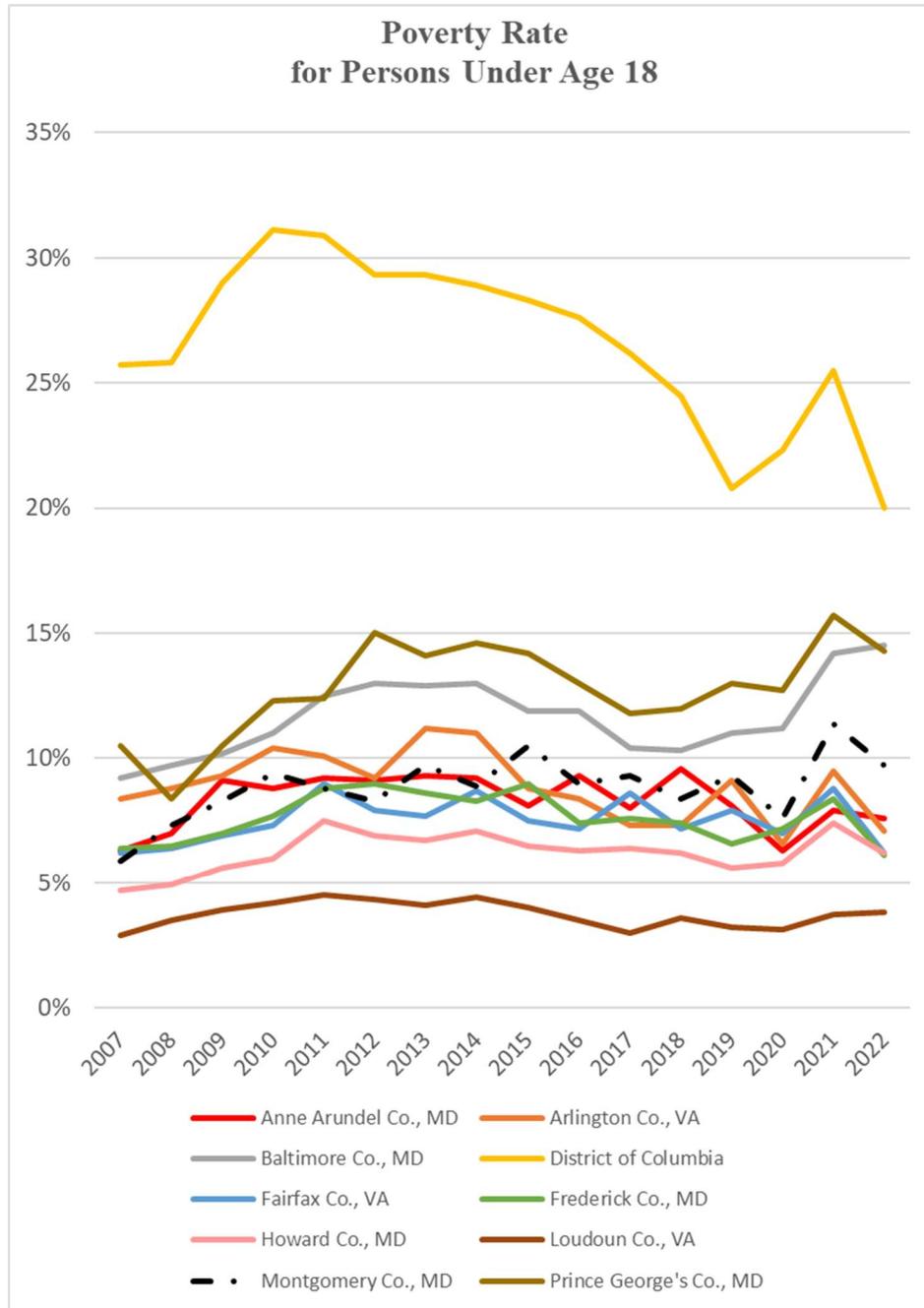
A drop in an area's poverty rate for children under age 18 might indicate that increased minimum wage rates are moving some households – including any children in that household - out of poverty. A person working 40 hours a week for 52 weeks a year at the current federal minimum wage rate of \$7.25 per hour would earn about \$15,000, an income just above the 2021 FPT for an individual and well below the FPT for a family of four. In contrast, a person working 40 hours a week for 52 weeks a year at a minimum wage rate of \$12.25 would earn over \$25,000 for the year. Yet, determining the relationship between changes in the minimum wage rate and the poverty rate is challenging because poverty is also affected by many other factors. Factors that affect the poverty rate include job

availability in the local economy, the wage structure of available jobs, the number of hours worked, barriers to higher education, rates of unintended pregnancies, and rates of labor force participation. Moreover, many families with incomes below the FPT are not in the labor market.

Source of data:

Small Area Income and Poverty Estimates (SAIPE), Census Bureau, U.S. Department of Commerce.²⁰

Figure 3-4. Poverty Rate for Persons Under Age 18, 2007-2022.



Data source: Small Area Income and Poverty Estimates (SAIPE), Census Bureau, U.S. Department of Commerce.

Table 3-4. Poverty Rate for Persons Under Age 18, 2007-2022.

Poverty Rate (Percent) for Persons Under Age 18

Source: Small Area Income and Poverty Estimates (SAIPE), Census Bureau, U.S. Department of Commerce

| FIPS | Name | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------|---------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| 24003 | Anne Arundel Co., MD | 6.3% | 7.0% | 9.1% | 8.8% | 9.2% | 9.1% | 9.3% | 9.2% |
| 51013 | Arlington Co., VA | 8.4% | 8.8% | 9.3% | 10.4% | 10.1% | 9.2% | 11.2% | 11.0% |
| 24005 | Baltimore Co., MD | 9.2% | 9.7% | 10.2% | 11.0% | 12.5% | 13.0% | 12.9% | 13.0% |
| 11000 | District of Columbia | 25.7% | 25.8% | 29.0% | 31.1% | 30.9% | 29.3% | 29.3% | 28.9% |
| 51059 | Fairfax Co., VA | 6.2% | 6.4% | 6.9% | 7.3% | 9.0% | 7.9% | 7.7% | 8.7% |
| 24021 | Frederick Co., MD | 6.4% | 6.5% | 7.0% | 7.7% | 8.8% | 9.0% | 8.6% | 8.3% |
| 24027 | Howard Co., MD | 4.7% | 4.9% | 5.6% | 6.0% | 7.5% | 6.9% | 6.7% | 7.1% |
| 51107 | Loudoun Co., VA | 2.9% | 3.5% | 3.9% | 4.2% | 4.5% | 4.3% | 4.1% | 4.4% |
| 24031 | Montgomery Co., MD | 5.9% | 7.3% | 8.3% | 9.4% | 8.8% | 8.3% | 9.7% | 8.9% |
| 24033 | Prince George's Co., MD | 10.5% | 8.4% | 10.5% | 12.3% | 12.4% | 15.0% | 14.1% | 14.6% |

| | | | | | | | | | |
|-------|---------------|-------|-------|-------|-------|-------|-------|-------|-------|
| 24000 | Maryland | 10.6% | 10.4% | 11.8% | 13.1% | 13.9% | 14.1% | 13.9% | 13.8% |
| 51000 | Virginia | 12.9% | 13.6% | 14.0% | 14.6% | 15.6% | 15.5% | 15.7% | 15.9% |
| 0 | United States | 18.0% | 18.2% | 20.0% | 21.6% | 22.5% | 22.6% | 22.2% | 21.7% |

| FIPS | Name | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|--------------|---------------------------|--------------|-------------|-------------|-------------|-------------|-------------|--------------|-------------|
| 24003 | Anne Arundel Co., MD | 8.1% | 9.3% | 8.0% | 9.6% | 8.1% | 6.3% | 7.9% | 7.6% |
| 51013 | Arlington Co., VA | 8.8% | 8.4% | 7.3% | 7.3% | 9.1% | 6.6% | 9.5% | 7.1% |
| 24005 | Baltimore Co., MD | 11.9% | 11.9% | 10.4% | 10.3% | 11.0% | 11.2% | 14.2% | 14.5% |
| 11000 | District of Columbia | 28.3% | 27.6% | 26.2% | 24.5% | 20.8% | 22.3% | 25.5% | 20.0% |
| 51059 | Fairfax Co., VA | 7.5% | 7.2% | 8.6% | 7.2% | 7.9% | 7.0% | 8.8% | 6.2% |
| 24021 | Frederick Co., MD | 9.0% | 7.4% | 7.6% | 7.4% | 6.6% | 7.2% | 8.4% | 6.1% |
| 24027 | Howard Co., MD | 6.5% | 6.3% | 6.4% | 6.2% | 5.6% | 5.8% | 7.4% | 6.2% |
| 51107 | Loudoun Co., VA | 4.0% | 3.5% | 3.0% | 3.6% | 3.2% | 3.1% | 3.7% | 3.8% |
| 24031 | Montgomery Co., MD | 10.5% | 9.0% | 9.3% | 8.4% | 9.3% | 7.6% | 11.4% | 9.7% |
| 24033 | Prince George's Co., MD | 14.2% | 13.0% | 11.8% | 12.0% | 13.0% | 12.7% | 15.7% | 14.3% |

| | | | | | | | | | |
|-------|---------------|-------|-------|-------|-------|-------|-------|-------|-------|
| 24000 | Maryland | 13.9% | 13.0% | 12.4% | 12.1% | 12.3% | 11.2% | 14.0% | 12.1% |
| 51000 | Virginia | 15.0% | 14.3% | 14.0% | 13.8% | 13.3% | 12.2% | 13.3% | 12.8% |
| 0 | United States | 20.7% | 19.5% | 18.4% | 18.0% | 16.8% | 15.7% | 16.9% | 16.3% |

Economic Indicator #5: Percentage of Residents Receiving SNAP (Food Stamp) Benefits

Definition:

The Supplemental Nutrition Assistance Program (SNAP), formerly known as the Food Stamp Program, is a federal aid program that provides food-purchasing assistance for low- and no-income people. To receive SNAP benefits, a household must meet certain requirements that include resource and income limits. The federal government updates these eligibility limits annually. (Special SNAP rules apply to households with elderly or disabled members.)²¹ SNAP income limits are set at about 130 percent of the FPLs. The SNAP program reports the number of people and the number of households who receive benefits.

Indicator's relationship to the local economy and the minimum wage:

Eligibility for SNAP is a common measure of income adequacy and whether an individual or a household is earning enough to avoid serious economic deprivation. SNAP enrollment numbers are also useful because they track the strength of the local economy. The number of beneficiaries increases during an economic recession and drops as the economy recovers. Since SNAP is a federal entitlement benefit, enrollment numbers reflect need and not budget allocations.

Economic research on the effects of minimum wage laws sometimes uses the number of people or households eligible for SNAP as a measure of income adequacy since it includes a larger number of low-wage workers who are likely to benefit from a minimum wage increase than the number of people the poverty rate counts.²² Other research has found a relationship between higher minimum wage rates and lower SNAP enrollment levels: one study of state and federal minimum wage increases over a 20-year period calculated that a 10 percent increase in the minimum wage reduced SNAP enrollment by about 3 percent on average. Therefore, this report includes both the child poverty rate and the percentage of people receiving SNAP benefits as economic indicators.

Source of data:

Small Area Income and Poverty Estimates (SAIPE), Census Bureau, U.S. Department of Commerce.²³

Current data and definitional changes to the indicator:

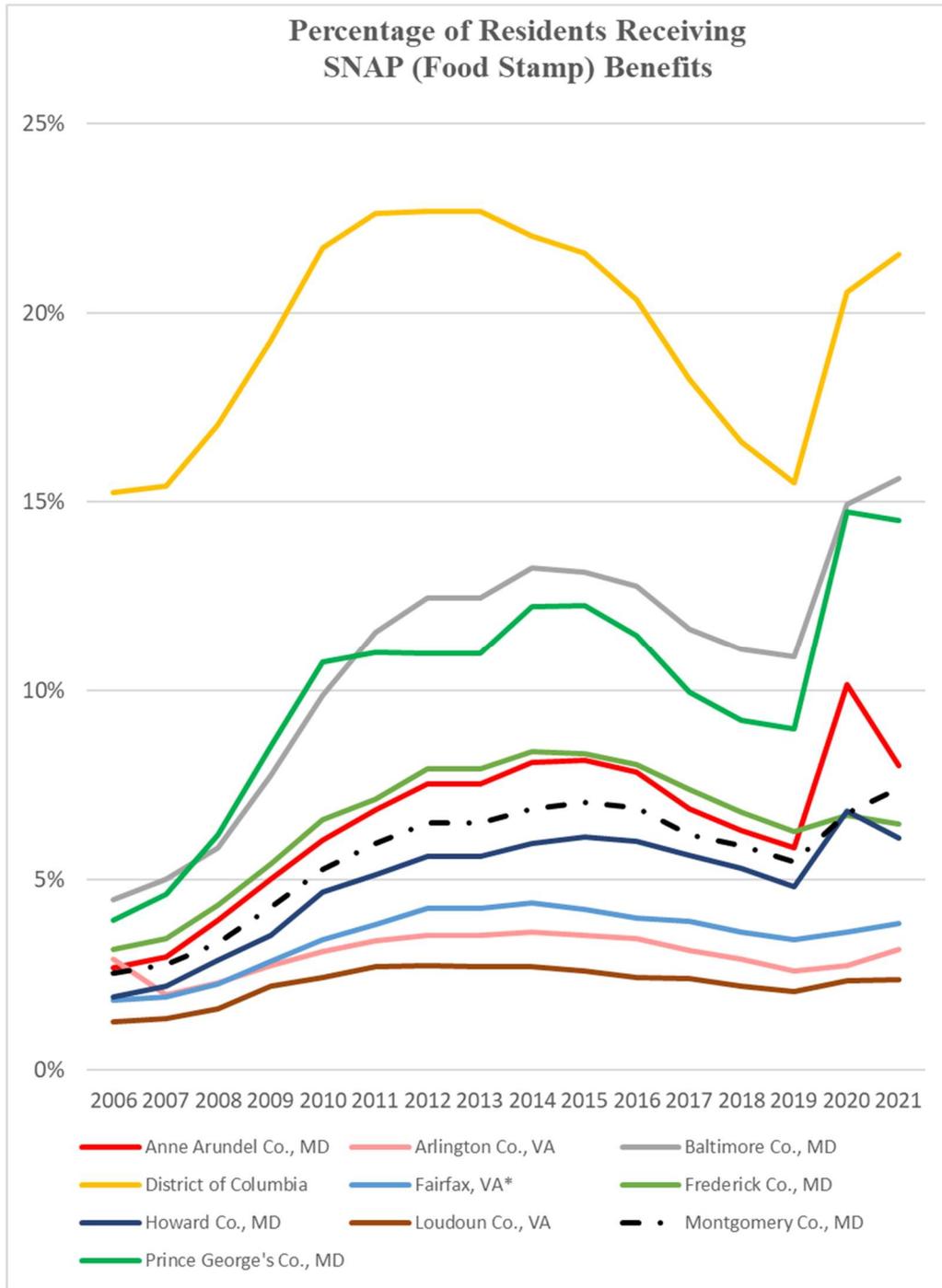
Note: The most recent County level SNAP data published by the Census Bureau is from July 2021 when the economy was still affected by the pandemic.

Figure 3-5 and Table 3-5 reflect Census Bureau revisions to the numbers for 2021. From 2020 to 2021, the percentage of Montgomery County residents receiving SNAP benefits rose from 6.8 percent to 7.4 percent. The Montgomery County 2021 SNAP rate was higher than the rates in Arlington, Fairfax, Frederick, Howard, and Loudoun Counties, but lower than the rates in Anne Arundel, Baltimore, and Prince George's Counties.

In December 2019, the U.S. Department of Agriculture finalized new rules for the SNAP program. Previously, federal rules limited participation for a subset of SNAP beneficiaries, i.e., Able Bodied Adults Without Dependents (ABAWD) between the ages of 18 and 49, unless an individual was working and/or participating in a work program to maintain their eligibility for benefits. However, these rules also gave states the discretion to waive some or all of these requirements in areas where sufficient jobs were not available. According to USDA, as of December 2019, nearly half of ABAWD receiving SNAP live in waived areas.²⁴

The rule changes took effect April 1, 2020. Because the new federal rules place limits on states' exemption criteria, they are expected to reduce the eligibility of current ABAWD participants. This change may reduce the usefulness of SNAP beneficiaries as a proxy for estimating the number of low-wage working adults likely to benefit from minimum wage increases.

Figure 3-5. Percentage of Residents Receiving SNAP (Food Stamp) Benefits, 2006-2021.



Data source: Small Area Income and Poverty Estimates (SAIPE), Census Bureau, U.S. Department of Commerce.

Table 3-5. Percentage of Residents Receiving SNAP (Food Stamp) Benefits, 2006-2021.

Percentage of Residents Receiving SNAP (Food Stamp) Benefits

Source: Small Area Income and Poverty Estimates (SAIPE), Census Bureau, U.S. Department of Commerce
Regional Economic Data (CAINC1), Bureau of Economic Analysis, U.S. Department of Commerce
July 2006 - July 2021

| FIPS | Name | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|--------------|---------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| 24003 | Anne Arundel Co., MD | 2.7% | 3.0% | 3.9% | 5.0% | 6.1% | 6.9% | 7.5% | 7.5% |
| 51013 | Arlington Co., VA | 2.9% | 2.0% | 2.3% | 2.8% | 3.1% | 3.4% | 3.5% | 3.5% |
| 24005 | Baltimore Co., MD | 4.5% | 5.0% | 5.8% | 7.8% | 9.9% | 11.5% | 12.5% | 12.5% |
| 11000 | District of Columbia | 15.2% | 15.4% | 17.0% | 19.3% | 21.7% | 22.6% | 22.7% | 22.7% |
| 51919 | Fairfax, VA* | 1.8% | 1.9% | 2.3% | 2.9% | 3.4% | 3.8% | 4.3% | 4.3% |
| 24021 | Frederick Co., MD | 3.2% | 3.4% | 4.3% | 5.4% | 6.6% | 7.1% | 7.9% | 7.9% |
| 24027 | Howard Co., MD | 1.9% | 2.2% | 2.9% | 3.5% | 4.7% | 5.1% | 5.6% | 5.6% |
| 51107 | Loudoun Co., VA | 1.2% | 1.3% | 1.6% | 2.2% | 2.4% | 2.7% | 2.7% | 2.7% |
| 24031 | Montgomery Co., MD | 2.5% | 2.8% | 3.4% | 4.3% | 5.3% | 6.0% | 6.5% | 6.5% |
| 24033 | Prince George's Co., MD | 3.9% | 4.6% | 6.2% | 8.5% | 10.7% | 11.0% | 11.0% | 11.0% |

| | | | | | | | | | |
|-------|----------|------|------|------|------|-------|-------|-------|-------|
| 24000 | Maryland | 5.5% | 6.1% | 7.5% | 9.3% | 11.2% | 12.1% | 12.8% | 12.8% |
| 51000 | Virginia | 6.7% | 6.9% | 7.8% | 9.6% | 10.5% | 11.1% | 11.4% | 11.4% |

| FIPS | Name | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|--------------|---------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| 24003 | Anne Arundel Co., MD | 8.1% | 8.2% | 7.8% | 6.9% | 6.3% | 5.9% | 10.2% | 8.0% |
| 51013 | Arlington Co., VA | 3.6% | 3.5% | 3.5% | 3.1% | 2.9% | 2.6% | 2.8% | 3.2% |
| 24005 | Baltimore Co., MD | 13.3% | 13.2% | 12.8% | 11.6% | 11.1% | 10.9% | 14.9% | 15.6% |
| 11000 | District of Columbia | 22.0% | 21.6% | 20.3% | 18.2% | 16.6% | 15.5% | 20.5% | 21.6% |
| 51919 | Fairfax, VA* | 4.4% | 4.2% | 4.0% | 3.9% | 3.6% | 3.4% | 3.6% | 3.9% |
| 24021 | Frederick Co., MD | 8.4% | 8.3% | 8.0% | 7.4% | 6.8% | 6.3% | 6.7% | 6.5% |
| 24027 | Howard Co., MD | 6.0% | 6.1% | 6.0% | 5.6% | 5.3% | 4.8% | 6.8% | 6.1% |
| 51107 | Loudoun Co., VA | 2.7% | 2.6% | 2.4% | 2.4% | 2.2% | 2.0% | 2.4% | 2.4% |
| 24031 | Montgomery Co., MD | 6.9% | 7.0% | 6.9% | 6.2% | 5.9% | 5.5% | 6.8% | 7.4% |
| 24033 | Prince George's Co., MD | 12.2% | 12.2% | 11.5% | 10.0% | 9.2% | 9.0% | 14.7% | 14.5% |

| | | | | | | | | | |
|-------|----------|-------|-------|-------|-------|-------|-------|-------|-------|
| 24000 | Maryland | 13.3% | 13.1% | 12.6% | 11.6% | 10.9% | 10.3% | 13.4% | 13.9% |
| 51000 | Virginia | 11.3% | 10.5% | 10.0% | 9.4% | 8.8% | 8.3% | 8.8% | 8.7% |

* Virginia combination areas consist of one or two independent cities with 1980 populations of less than 100,000 combined with an adjacent county. BEA modifies the FIPS Codes to combine Fairfax County (FIPS 51059), Fairfax City (FIPS 51600) and Falls Church (FIPS 51610) into a single FIPS Code 51919. Separate estimates for the jurisdictions making up 51919 are not available.

Data source: Small Area Income and Poverty Estimates (SAIPE), Census Bureau, U.S. Department of Commerce

Overview of Economic Indicators for Labor Force, Unemployment, and Employment (#6-9)

Jobs and earnings in a local economy can be measured in many ways. Data may be collected using a census or a survey. Data may be reported by place of residence or by place of work (sometimes called establishment-based data, or payroll data.) Data sets may vary based on the types of employment included.

Some commonly used federal measures of county-level employment and wages include:²⁵

- *Bureau of Labor Statistics: Quarterly Census of Employment and Wages (QCEW)*. QCEW statistics are derived from tabulations of monthly employment and quarterly total wages of workers covered by public unemployment insurance (UI). QCEW reports statistics by place of work.
- *Census Bureau: County Business Patterns (CBP)*. Census Bureau employment and payroll statistics are published in the CBP series. CBP reports statistics by place of work. CBP statistics differ from QCEW statistics primarily because the CBP statistics exclude most government employees, whereas QCEW statistics include civilian government employees.²⁶
- *Bureau of Labor Statistics: Local Area Unemployment Statistics (LAUS)*. The LAUS program measures the labor force (employed and unemployed people) by place of residence. LAUS data are based on a survey of households conducted by the Census Bureau.
- *Bureau of Economic Analysis (BEA): Regional Economic Accounts Data*. BEA reports regional statistics including employment and wage and salary disbursements by industry. QCEW statistics from BLS comprise 95 percent of BEA's wage and salary income estimates, but BEA estimates can differ from the QCEW because BEA adjusts include employment and wages not covered by UI. (For example, QCEW statistics do not include domestic servants in private households or employees of religiously affiliated private schools.) BEA adjusts personal income statistics to represent it as place of residence statistics. Therefore, some BEA data sets are by place of work, and some are by place of residence.

The specific data source used for each economic indicator are shown on the pages that follow.

Economic Indicator #6: Resident Labor Force

Definition:

The LAUS program defines the civilian labor force as the sum of unemployed and employed people 16 years of age and older in a defined area.²⁷ The labor force is smaller than the population as a whole; it is also smaller than the population of working age persons since some people may be unable to work due to a disability, and some may voluntarily choose not to be in the labor force (such as while they are in school).

Indicator's relationship to the local economy and minimum wage:

Increases in the minimum wage rate could result in more persons of working age entering the labor force as either a job seeker or a job holder. However, since many minimum wage laws exempt workers under the age of 19, knowing whether any change in overall labor force size could be attributed to individuals in this cohort joining the labor force in response to changes to the minimum wage would require further research.

Source of data:

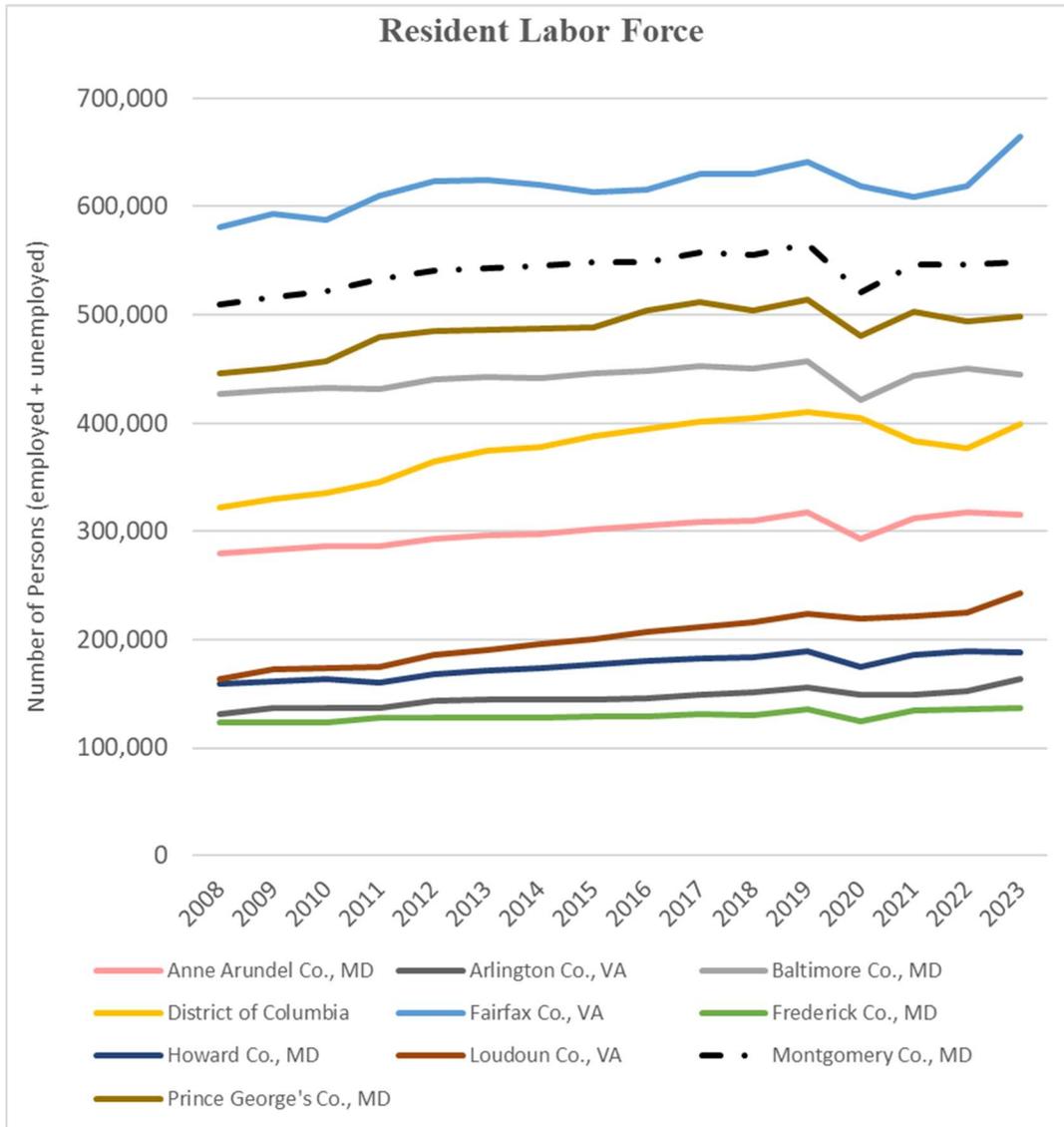
Local Area Unemployment Statistics (LAUS), Bureau of Labor Statistics, U.S. Department of Labor. LAUS data are based on a survey of households conducted by the Census Bureau. The LAUS program measures the labor force (employed persons plus unemployed persons) by place of residence. (Note that labor force estimates may vary among federal statistical agencies because of differences in methodology, design, and data collection.)

Current data and trends:

Figure 3-6 and Table 3-6 reflect September 2023 LAUS data, as well as BLS revisions to LAUS data for prior years. LAUS data show growth in the resident labor forces for Montgomery County and most other jurisdictions in the region.

Figure 3-6 and Table 3-6 show that in 2023, the regional resident labor force had, for the most part, returned to pre-pandemic levels. Nonetheless, the regional resident labor force changed at different rates in the region from 2022 to 2023. The three Virginia counties, Arlington, Fairfax, and Loudoun, experienced increases in the resident labor force of 7.6 percent, 7.5 percent, and 7.9 percent, respectively. The District of Columbia saw a 6.1 percent growth in its resident labor force from 2022 to 2023. In contrast, the resident labor force grew much more modestly in Maryland counties; the rate of resident labor force growth did not exceed one percent in any of the Maryland counties shown in Figure 3-6 and Table 3-6. The resident labor force in Montgomery County rose from 546,400 in 2022 to 548,457 in 2023, a 0.4 percent increase.

Figure 3-6. Resident Labor Force, 2008-2023.



Data source: Local Area Unemployment Statistics (LAUS), Bureau of Labor Statistics, U.S. Department of Labor.

Table 3-6. Resident Labor Force, 2008-2023.

Resident Labor Force /1

Source: Local Area Unemployment Statistics (LAUS), Bureau of Labor Statistics, U.S. Department of Labor (September 2023).

| LAUSCode (CN) | Name | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|----------------------|---------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| 2400300000000 | Anne Arundel Co., MD | 279,882 | 283,135 | 286,650 | 286,058 | 293,690 | 296,541 | 297,831 | 301,862 |
| 5101300000000 | Arlington Co., VA | 131,366 | 136,705 | 137,201 | 137,368 | 144,012 | 145,047 | 144,531 | 144,282 |
| 2400500000000 | Baltimore Co., MD | 427,026 | 430,124 | 432,708 | 431,512 | 440,254 | 442,215 | 442,036 | 446,382 |
| 1100100000000 | District of Columbia | 322,237 | 330,544 | 335,672 | 346,065 | 364,989 | 374,126 | 378,380 | 388,057 |
| 5105900000000 | Fairfax Co., VA | 581,377 | 592,899 | 587,584 | 610,521 | 623,843 | 624,266 | 619,812 | 613,618 |
| 2402100000000 | Frederick Co., MD | 123,692 | 123,410 | 124,142 | 127,907 | 128,605 | 128,453 | 128,206 | 128,928 |
| 2402700000000 | Howard Co., MD | 159,215 | 161,287 | 163,780 | 160,630 | 168,214 | 171,319 | 173,617 | 177,290 |
| 5110700000000 | Loudoun Co., VA | 163,971 | 173,148 | 174,290 | 175,439 | 186,073 | 191,048 | 195,972 | 200,054 |
| 2403100000000 | Montgomery Co., MD | 509,769 | 515,987 | 522,421 | 532,549 | 540,427 | 543,124 | 545,005 | 549,111 |
| 2403300000000 | Prince George's Co., MD | 445,492 | 450,361 | 457,576 | 479,606 | 484,964 | 486,011 | 486,971 | 488,148 |

| LAUSCode | Name | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|----------------------|---------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| 2400300000000 | Anne Arundel Co., MD | 305,361 | 309,214 | 309,603 | 317,780 | 293,081 | 312,500 | 317,711 | 315,291 |
| 5101300000000 | Arlington Co., VA | 146,166 | 149,627 | 151,720 | 155,769 | 149,122 | 149,402 | 152,125 | 163,710 |
| 2400500000000 | Baltimore Co., MD | 447,980 | 453,197 | 450,366 | 457,555 | 421,912 | 444,224 | 450,345 | 445,354 |
| 1100100000000 | District of Columbia | 394,586 | 400,894 | 404,610 | 409,969 | 404,522 | 383,024 | 376,477 | 399,274 |
| 5105900000000 | Fairfax Co., VA | 615,851 | 629,698 | 630,229 | 641,034 | 619,346 | 608,914 | 618,793 | 665,108 |
| 2402100000000 | Frederick Co., MD | 129,447 | 131,266 | 130,831 | 135,761 | 124,797 | 135,111 | 136,282 | 137,044 |
| 2402700000000 | Howard Co., MD | 180,344 | 182,804 | 183,889 | 189,135 | 174,409 | 186,506 | 189,843 | 188,649 |
| 5110700000000 | Loudoun Co., VA | 206,982 | 211,626 | 216,433 | 224,573 | 219,658 | 221,504 | 225,276 | 242,963 |
| 2403100000000 | Montgomery Co., MD | 548,401 | 557,412 | 554,989 | 565,866 | 520,463 | 546,313 | 546,400 | 548,457 |
| 2403300000000 | Prince George's Co., MD | 503,489 | 511,766 | 504,423 | 513,953 | 480,502 | 502,720 | 493,782 | 498,315 |

1/ Labor Force = Employed persons + Unemployed persons, by place-of-residence.

Economic Indicator #7: Resident Unemployment Rate

Definition:

The unemployment rate is the ratio of unemployed persons to the civilian labor force expressed as a percent. The Census Bureau classifies persons ages 16 and older as unemployed if they are jobless and have actively looked for work in the past month and are currently available for work. Persons are also included as unemployed if they were not working and waiting to be recalled to a job from which they had been temporarily laid off. Whether a person receives unemployment insurance benefits has no bearing on whether the Census Bureau classifies a person as unemployed.²⁸

Frictional unemployment occurs when employees leave their job to find a better one or reenter the workforce after a voluntary period of joblessness (such as while attending school). Structural unemployment occurs when workers' skills or income requirements no longer match the jobs available.²⁹

Indicator's relationship to the local economy and the minimum wage:

Minimum wage rates could affect unemployment rates in a variety of ways. Higher labor costs due to the minimum wage could cause employers who employ low-wage workers to cut jobs, increasing the unemployment rate. Higher minimum wage rates could motivate persons not currently in the labor force to enter it, which could increase the unemployment rate. Businesses facing higher labor costs may try to raise prices to cover those costs, and if they are able to do so there may be no effect on the unemployment rate. Higher minimum wage rates could lead to higher employee productivity, offsetting the higher labor costs for businesses. A higher minimum wage rate could increase the buying power of low-wage workers, stimulating overall economic activity and causing a net gain in jobs in the economy.³⁰

Many other factors can affect unemployment rates. Economic conditions that create a downturn in consumer demand for products can lead employers to lay off workers. Economic conditions that increase consumer demand for products could reduce unemployment if employers add jobs, but such conditions could also increase frictional unemployment if more employees leave jobs for better ones.

Source of data:

Local Area Unemployment Statistics (LAUS), Bureau of Labor Statistics, U.S. Department of Labor.

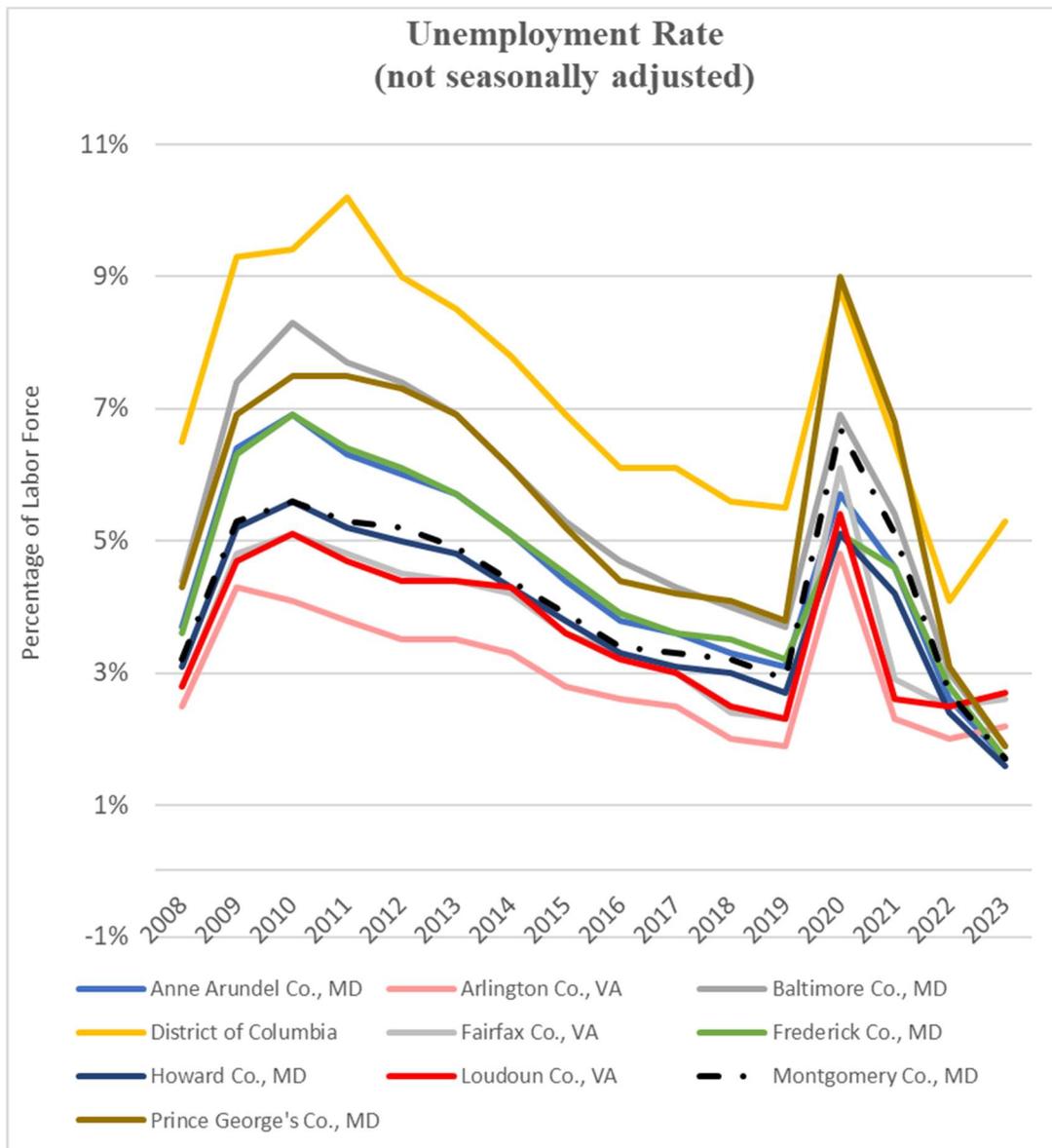
The LAUS program measures the labor force (employed and unemployed people) by place of residence. LAUS data are based on a survey of households conducted by the Census Bureau.

Current data and trends:

Figure 3-7 and Table 3-7 reflect September 2023 LAUS data, as well as BLS revisions to LAUS data for prior years.

Unemployment rates rose sharply in 2020 as the pandemic eliminated jobs throughout the economy. Figure 3-7 shows that unemployment rates returned to pre-pandemic levels in 2021 and 2022 and dropped even lower in 2023. The unemployment rate in Montgomery County rose from 2.9 percent in September 2019 to 6.7 percent in September 2020. The County’s unemployment rate dropped back to 2.7 in September 2022 and fell even further to 1.7 percent in September 2023. A similar pattern occurred in most other area jurisdictions with Maryland counties having lower 2023 unemployment rates than Virginia counties.

Figure 3-7. Unemployment Rate (not seasonally adjusted), 2008-2023.



Data source: Local Area Unemployment Statistics (LAUS), Bureau of Labor Statistics, U.S. Department of Labor.

Table 3-7. Unemployment Rate (not seasonally adjusted), 2008-2023

Unemployment Rate (%)

Source: Local Area Unemployment Statistics (LAUS), Bureau of Labor Statistics, U.S. Department of Labor (September 2023).

| LAUSCode (CN) | Name | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|----------------------|---------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| 2400300000000 | Anne Arundel Co., MD | 3.7% | 6.4% | 6.9% | 6.3% | 6.0% | 5.7% | 5.1% | 4.4% |
| 5101300000000 | Arlington Co., VA | 2.5% | 4.3% | 4.1% | 3.8% | 3.5% | 3.5% | 3.3% | 2.8% |
| 2400500000000 | Baltimore Co., MD | 4.4% | 7.4% | 8.3% | 7.7% | 7.4% | 6.9% | 6.1% | 5.3% |
| 1100100000000 | District of Columbia | 6.5% | 9.3% | 9.4% | 10.2% | 9.0% | 8.5% | 7.8% | 6.9% |
| 5105900000000 | Fairfax Co., VA | 2.8% | 4.8% | 5.1% | 4.8% | 4.5% | 4.4% | 4.2% | 3.6% |
| 2402100000000 | Frederick Co., MD | 3.6% | 6.3% | 6.9% | 6.4% | 6.1% | 5.7% | 5.1% | 4.5% |
| 2402700000000 | Howard Co., MD | 3.1% | 5.2% | 5.6% | 5.2% | 5.0% | 4.8% | 4.3% | 3.8% |
| 5110700000000 | Loudoun Co., VA | 2.8% | 4.7% | 5.1% | 4.7% | 4.4% | 4.4% | 4.3% | 3.6% |
| 2403100000000 | Montgomery Co., MD | 3.2% | 5.3% | 5.6% | 5.3% | 5.2% | 4.9% | 4.4% | 3.9% |
| 2403300000000 | Prince George's Co., MD | 4.3% | 6.9% | 7.5% | 7.5% | 7.3% | 6.9% | 6.1% | 5.2% |

| LAUSCode | Name | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|----------------------|---------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| 2400300000000 | Anne Arundel Co., MD | 3.8% | 3.6% | 3.3% | 3.1% | 5.7% | 4.6% | 2.6% | 1.7% |
| 5101300000000 | Arlington Co., VA | 2.6% | 2.5% | 2.0% | 1.9% | 4.8% | 2.3% | 2.0% | 2.2% |
| 2400500000000 | Baltimore Co., MD | 4.7% | 4.3% | 4.0% | 3.7% | 6.9% | 5.4% | 3.0% | 1.9% |
| 1100100000000 | District of Columbia | 6.1% | 6.1% | 5.6% | 5.5% | 8.8% | 6.5% | 4.1% | 5.3% |
| 5105900000000 | Fairfax Co., VA | 3.3% | 3.0% | 2.4% | 2.3% | 6.1% | 2.9% | 2.5% | 2.6% |
| 2402100000000 | Frederick Co., MD | 3.9% | 3.6% | 3.5% | 3.2% | 5.1% | 4.6% | 2.8% | 1.7% |
| 2402700000000 | Howard Co., MD | 3.3% | 3.1% | 3.0% | 2.7% | 5.1% | 4.2% | 2.4% | 1.6% |
| 5110700000000 | Loudoun Co., VA | 3.2% | 3.0% | 2.5% | 2.3% | 5.4% | 2.6% | 2.5% | 2.7% |
| 2403100000000 | Montgomery Co., MD | 3.4% | 3.3% | 3.2% | 2.9% | 6.7% | 5.1% | 2.7% | 1.7% |
| 2403300000000 | Prince George's Co., MD | 4.4% | 4.2% | 4.1% | 3.8% | 9.0% | 6.8% | 3.1% | 1.9% |

Economic Indicator #8: Total Workplace Employment

Definition:

BEA estimates total employment as the number of full-time and part-time wage and salary jobs, sole proprietorships, and individual general partners (but not unpaid family workers or volunteers).³¹

Many sole proprietorships are self-employed individuals earning income as independent contractors or freelancers. Self-employed individuals are not subject to the Montgomery County minimum wage law. Sole proprietorships have been a growing category of employment over the last decade.³² Research by the Stephen S. Fuller Institute has found that non-farm proprietors' income now accounts for ten percent of all earnings by place of work in the Washington, D.C. region. The contribution of this income source is particularly striking in Montgomery County where it accounts for 23 percent of earnings by place of work.³³

Indicator's relationship to the local economy and the minimum wage:

This report includes two general employment indicators: statistics for total employment and statistics for the subset of employment that is wage and salary jobs. Total employment captures more types of employment than wage and salary employment.

Current data and trends:

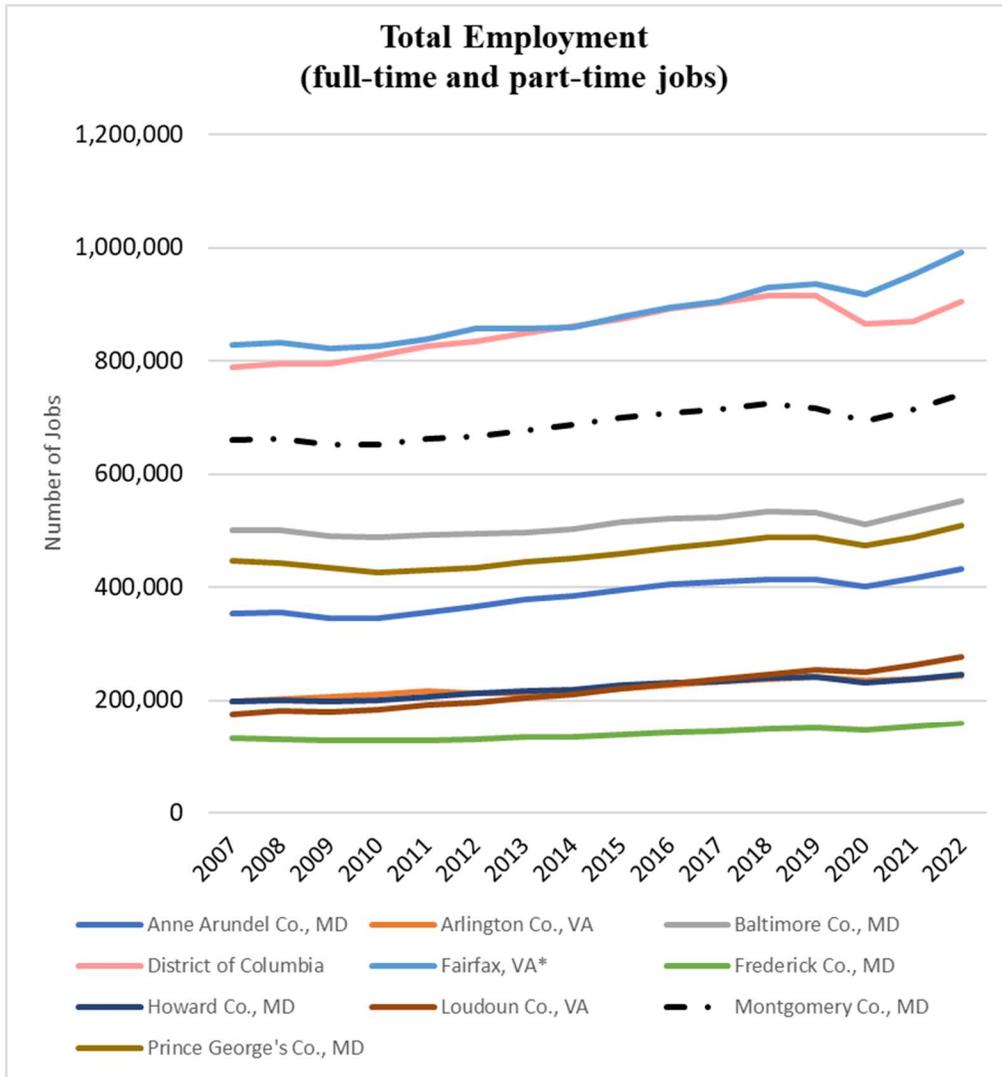
As reflected in Figure 3-8 and Table 3-8, the BEA measured the size of Montgomery County's total employment base at 741,956 jobs in 2022, an increase of 3.8 percent (27,096 jobs) compared to 2021. All jurisdictions in the region experienced employment growth from 2021 to 2022. The largest rate of employment growth occurred in Loudoun (5.5 percent), Frederick (4.3 percent), Prince George's (4.2 percent), and Fairfax (4.2 percent) Counties.

Source of data:

Regional Economic Accounts, Bureau of Economic Analysis (BEA), U.S. Department of Commerce.

The Quarterly Census of Employment and Wages (QCEW) statistics from BLS comprises 95 percent of BEA's wage and salary income estimates, but BEA estimates can differ from QCEW statistics because BEA adjusts employment and wages not covered by public unemployment insurance programs. (For example, QCEW data does not include domestic servants in private households, nor does it count employment in religiously affiliated private schools.)

Figure 3-8. Total Workplace Employment, 2007-2022.



*BEA modifies the FIPS Codes to combine Fairfax County (FIPS 51059), Fairfax City (FIPS 51600) and Falls Church (FIPS 51610) into a single FIPS Code 51919. Separate estimates for the jurisdictions making up 51919 are not available.

Data source: Regional Economic Accounts, Bureau of Economic Analysis (BEA), U.S. Department of Commerce.

Table 3-8. Total Workplace Employment, 2007-2022.

Total Employment (Number of jobs) 1/

Source: Regional Economic Data (CAEMP25N), Bureau of Economic Analysis, U.S. Department of Commerce

| FIPS | Name | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------|---------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| 24003 | Anne Arundel Co., MD | 353,880 | 354,876 | 345,913 | 345,618 | 355,144 | 365,034 | 379,189 | 385,251 |
| 51013 | Arlington Co., VA | 198,545 | 202,775 | 205,930 | 210,386 | 215,762 | 212,248 | 212,978 | 213,861 |
| 24005 | Baltimore Co., MD | 500,525 | 501,097 | 490,819 | 487,862 | 491,560 | 494,593 | 497,571 | 503,404 |
| 11000 | District of Columbia | 788,410 | 794,912 | 795,912 | 809,137 | 826,761 | 834,413 | 848,226 | 860,669 |
| 51919 | Fairfax, VA* | 827,412 | 832,867 | 822,361 | 825,687 | 838,615 | 858,111 | 857,784 | 860,180 |
| 24021 | Frederick Co., MD | 131,069 | 129,844 | 127,808 | 127,543 | 127,197 | 129,332 | 132,846 | 133,891 |
| 24027 | Howard Co., MD | 198,183 | 200,059 | 198,351 | 200,426 | 206,672 | 213,578 | 217,454 | 219,363 |
| 51107 | Loudoun Co., VA | 176,203 | 181,061 | 179,822 | 183,855 | 190,953 | 195,925 | 203,895 | 209,683 |
| 24031 | Montgomery Co., MD | 659,374 | 661,376 | 651,521 | 651,834 | 663,362 | 666,825 | 676,396 | 688,124 |
| 24033 | Prince George's Co., MD | 447,324 | 443,519 | 433,377 | 426,807 | 430,315 | 433,821 | 444,117 | 450,103 |

| | | | | | | | | | |
|-------|----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| 24000 | Maryland | 3,440,607 | 3,430,882 | 3,359,485 | 3,345,423 | 3,394,831 | 3,438,880 | 3,493,921 | 3,537,654 |
| 51000 | Virginia | 4,869,348 | 4,870,415 | 4,758,119 | 4,743,189 | 4,802,678 | 4,856,886 | 4,898,765 | 4,953,354 |

| FIPS | Name | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|--------------|---------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| 24003 | Anne Arundel Co., MD | 394,134 | 405,375 | 410,464 | 414,689 | 413,611 | 400,616 | 416,390 | 432,915 |
| 51013 | Arlington Co., VA | 221,664 | 227,326 | 233,652 | 237,183 | 241,498 | 236,381 | 236,959 | 243,081 |
| 24005 | Baltimore Co., MD | 514,457 | 520,546 | 523,756 | 534,865 | 532,051 | 511,473 | 531,652 | 551,655 |
| 11000 | District of Columbia | 873,204 | 892,796 | 902,843 | 914,319 | 915,212 | 866,085 | 869,738 | 904,759 |
| 51919 | Fairfax, VA* | 877,354 | 893,516 | 905,880 | 929,240 | 935,511 | 917,964 | 951,872 | 992,170 |
| 24021 | Frederick Co., MD | 137,890 | 141,942 | 144,428 | 148,508 | 150,579 | 145,342 | 151,927 | 158,423 |
| 24027 | Howard Co., MD | 227,369 | 231,230 | 234,009 | 238,602 | 240,797 | 230,475 | 238,132 | 245,933 |
| 51107 | Loudoun Co., VA | 220,460 | 229,515 | 237,377 | 246,567 | 254,198 | 250,122 | 263,128 | 277,683 |
| 24031 | Montgomery Co., MD | 700,355 | 708,656 | 714,098 | 724,379 | 716,607 | 693,996 | 714,860 | 741,956 |
| 24033 | Prince George's Co., MD | 459,200 | 469,946 | 477,695 | 487,783 | 488,470 | 473,669 | 488,401 | 508,718 |

| | | | | | | | | | |
|-------|----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| 24000 | Maryland | 3,602,930 | 3,659,063 | 3,696,841 | 3,752,933 | 3,744,535 | 3,621,705 | 3,750,161 | 3,886,891 |
| 51000 | Virginia | 5,060,270 | 5,156,659 | 5,229,126 | 5,299,069 | 5,329,577 | 5,224,726 | 5,392,698 | 5,599,585 |

Legend / Footnotes:

1/ The estimates of employment for 2001-2006 are based on the 2002 North American Industry Classification System (NAICS). The estimates for 2007-2010 are based on the 2007 NAICS. The estimates for 2011-2016 are based on the 2012 NAICS. The estimates for 2017 forward are based on the 2017 NAICS.

* Virginia combination areas consist of one or two independent cities with 1980 populations of less than 100,000 combined with an adjacent county. BEA modifies the FIPS Codes to combine Fairfax County (FIPS 51059), Fairfax City (FIPS 51600) and Falls Church (FIPS 51610) into a single FIPS Code 51919. Separate estimates for the jurisdictions making up 51919 are not available.

Last updated: November 16, 2023-- new statistics for 2022; revised statistics for 2007-2021.

Economic Indicator #9: Wage and Salary Employment (by Place of Work)

Definition:

BEA's wage and salary employment statistics count the number of full-time and part-time jobs for which wages and salaries are paid. This estimate measures the number of jobs in each area by place of work, averaged over the year.³⁴ Wages and salaries include commissions, tips, and bonuses.³⁵

Indicator's relationship to the local economy and the minimum wage:

This indicator does not target only those jobs for which the hourly wage would likely be lower in the absence of a statutory minimum hourly rate. Nevertheless, this indicator may be more specific to those jobs than the broader indicator of total employment and can serve as one indicator of the general strength of an area economy.

Changes to the minimum wage rate could affect wage and salary jobs that currently pay below that minimum rate for many of the same reasons discussed above for the unemployment rate. Higher labor costs due to the minimum wage could cause employers who employ low-wage workers to cut the number of wage and salary jobs. Higher minimum wage rates could motivate persons not currently in the labor force to enter it, filling currently unfilled positions. Businesses facing higher labor costs may try to raise prices to cover those costs, and if they are able to do so there may be no effect on the number of wage and salary jobs. Higher minimum wage rates could lead to higher employee productivity, offsetting the higher labor costs for businesses. A higher minimum wage rate could increase the buying power of low-wage workers, stimulating overall economic activity and causing a net gain in wage and salary jobs in the economy.

Over time, changes to the minimum wage rate could also influence the relative proportion of jobs in different employment categories, such as salaried jobs versus jobs done under a contract with a sole proprietor.

Current data and trends:

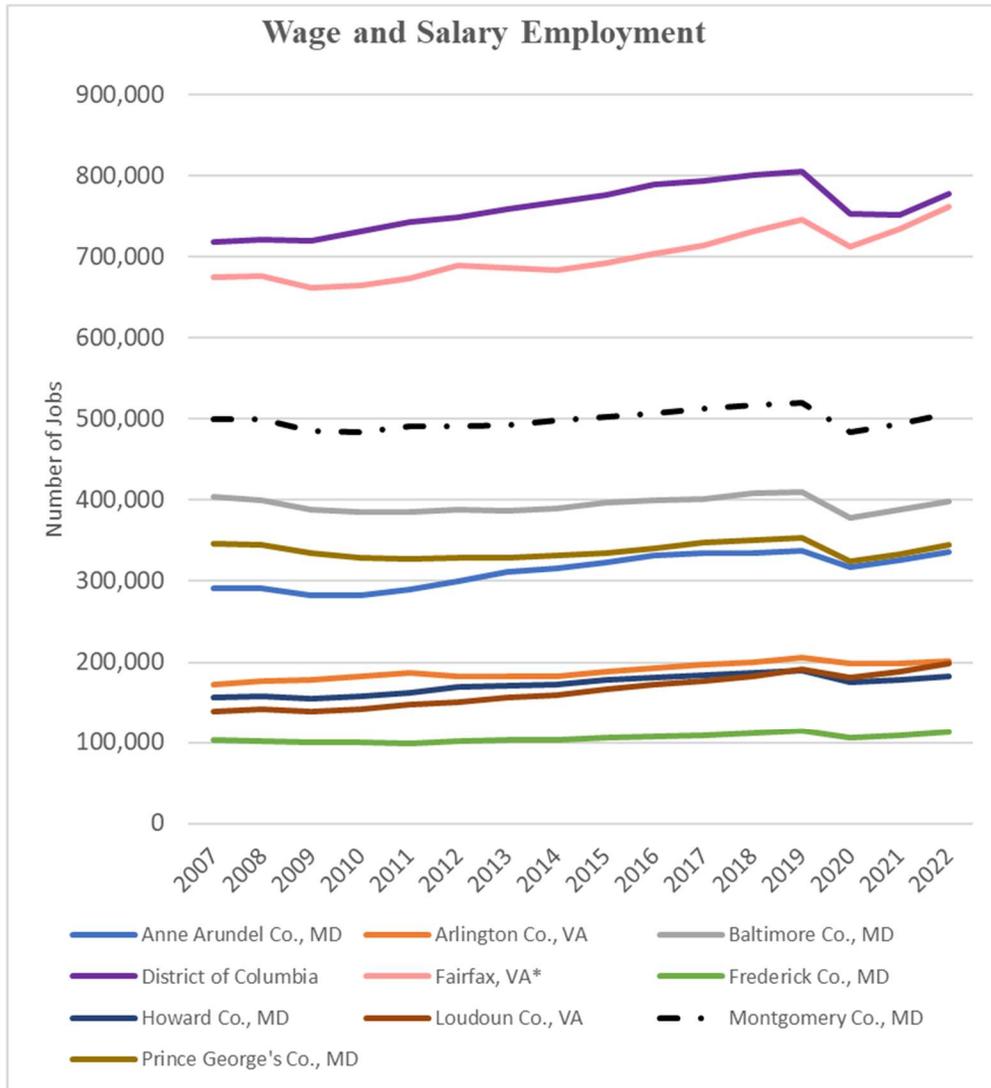
As reflected in Figure 3-9 and Table 3-9, BEA data show increases from 2021 to 2022 in wage and salary employment by place of work for Montgomery County and all jurisdictions in the surrounding area. From 2021 to 2022, wage and salary employment in Montgomery County rose by 2.5 percent, an addition of 12,506 jobs, almost restoring the number of wage and salary jobs to the pre-pandemic level. In the region, Loudoun County experienced the greatest percent wage and salary employment increase with 5.2 percent growth.

Source of data:

Regional Economic Accounts, Bureau of Economic Analysis (BEA), U.S. Department of Commerce.

The Quarterly Census of Employment and Wages (QCEW) statistics comprises 95 percent of BEA's wage and salary income estimates, but BEA estimates can differ from the QCEW statistics because BEA adjusts employment and wages not covered by public unemployment insurance programs.

Figure 3-9. Wage and Salary Employment, 2007-2022.



*BEA modifies the FIPS Codes to combine Fairfax County (FIPS 51059), Fairfax City (FIPS 51600) and Falls Church (FIPS 51610) into a single FIPS Code 51919. Separate estimates for the jurisdictions making up 51919 are not available.

Data source: Regional Economic Accounts, Bureau of Economic Analysis (BEA), U.S. Department of Commerce.

Table 3-9. Wage and salary employment, 2007-2022.

Wage and Salary Employment (Number of Jobs)

Source: Regional Economic Data (CAINC4), Bureau of Economic Analysis, U.S. Department of Commerce

| FIPS | Name | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------|---------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| 24003 | Anne Arundel Co., MD | 291,071 | 292,003 | 282,621 | 282,829 | 290,026 | 300,158 | 311,460 | 316,170 |
| 51013 | Arlington Co., VA | 173,088 | 176,207 | 178,389 | 182,675 | 187,670 | 183,283 | 182,787 | 182,442 |
| 24005 | Baltimore Co., MD | 404,186 | 400,650 | 388,574 | 385,402 | 385,362 | 388,060 | 386,933 | 390,087 |
| 11001 | District of Columbia | 718,308 | 721,890 | 719,705 | 731,389 | 742,832 | 749,247 | 758,641 | 767,306 |
| 51919 | Fairfax, VA* | 674,791 | 676,747 | 661,733 | 665,417 | 674,306 | 690,259 | 687,041 | 683,286 |
| 24021 | Frederick Co., MD | 103,068 | 102,109 | 99,821 | 100,058 | 99,081 | 100,978 | 103,077 | 103,643 |
| 24027 | Howard Co., MD | 156,946 | 158,220 | 155,264 | 157,478 | 162,641 | 169,433 | 171,784 | 172,517 |
| 51107 | Loudoun Co., VA | 138,490 | 141,998 | 139,239 | 142,560 | 147,796 | 151,431 | 157,212 | 160,056 |
| 24031 | Montgomery Co., MD | 500,339 | 499,329 | 485,194 | 484,033 | 490,982 | 491,037 | 492,602 | 498,762 |
| 24033 | Prince George's Co., MD | 345,962 | 345,026 | 334,865 | 329,409 | 327,861 | 328,812 | 328,497 | 331,572 |

| FIPS | Name | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|--------------|---------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| 24003 | Anne Arundel Co., MD | 322,559 | 331,360 | 334,153 | 335,421 | 336,973 | 316,999 | 325,524 | 335,596 |
| 51013 | Arlington Co., VA | 188,705 | 192,700 | 197,713 | 200,546 | 206,193 | 199,152 | 198,004 | 201,711 |
| 24005 | Baltimore Co., MD | 396,737 | 399,886 | 401,575 | 409,102 | 410,412 | 378,557 | 388,650 | 398,329 |
| 11001 | District of Columbia | 775,951 | 789,591 | 794,340 | 801,809 | 805,843 | 753,721 | 751,720 | 778,627 |
| 51919 | Fairfax, VA* | 692,744 | 704,577 | 714,516 | 732,035 | 746,133 | 712,556 | 735,296 | 761,806 |
| 24021 | Frederick Co., MD | 106,445 | 107,835 | 109,197 | 112,188 | 114,671 | 105,969 | 109,241 | 112,921 |
| 24027 | Howard Co., MD | 178,089 | 181,623 | 183,739 | 186,440 | 189,827 | 175,739 | 178,652 | 182,146 |
| 51107 | Loudoun Co., VA | 166,902 | 172,223 | 177,363 | 183,070 | 191,023 | 180,593 | 189,144 | 198,921 |
| 24031 | Montgomery Co., MD | 502,873 | 507,438 | 513,064 | 516,781 | 520,063 | 484,174 | 494,044 | 506,550 |
| 24033 | Prince George's Co., MD | 334,688 | 340,886 | 348,401 | 350,498 | 353,193 | 325,168 | 333,242 | 344,713 |

Legend / Footnotes:

* Virginia combination areas consist of one or two independent cities with 1980 populations of less than 100,000 combined with an adjacent county. BEA modifies the FIPS Codes to combine Fairfax County (FIPS 51059), Fairfax City (FIPS 51600) and Falls Church (FIPS 51610) into a single FIPS Code 51919. Separate estimates for the jurisdictions making up 51919 are not available.

Last updated: November 16, 2023 -- new statistics for 2022; revised statistics for 2007-2021.

Economic Indicator #10: Number of Private Establishments

Definition:

BLS defines an establishment as a single physical location at which business is conducted or services or industrial operations are performed. A company or enterprise may consist of one or more establishments.

Indicator's relationship to the local economy and the minimum wage:

If the local economy expands or contracts, it may be reflected in the number of establishments. However, other factors may affect this indicator. For example, if more work is done remotely, or if work done at multiple locations is consolidated into one location, the number of establishments would decrease without necessarily lowering employment. If more work is automated in response to higher labor costs, it could result in a drop in employment without changing the number of establishments.

Source of data:

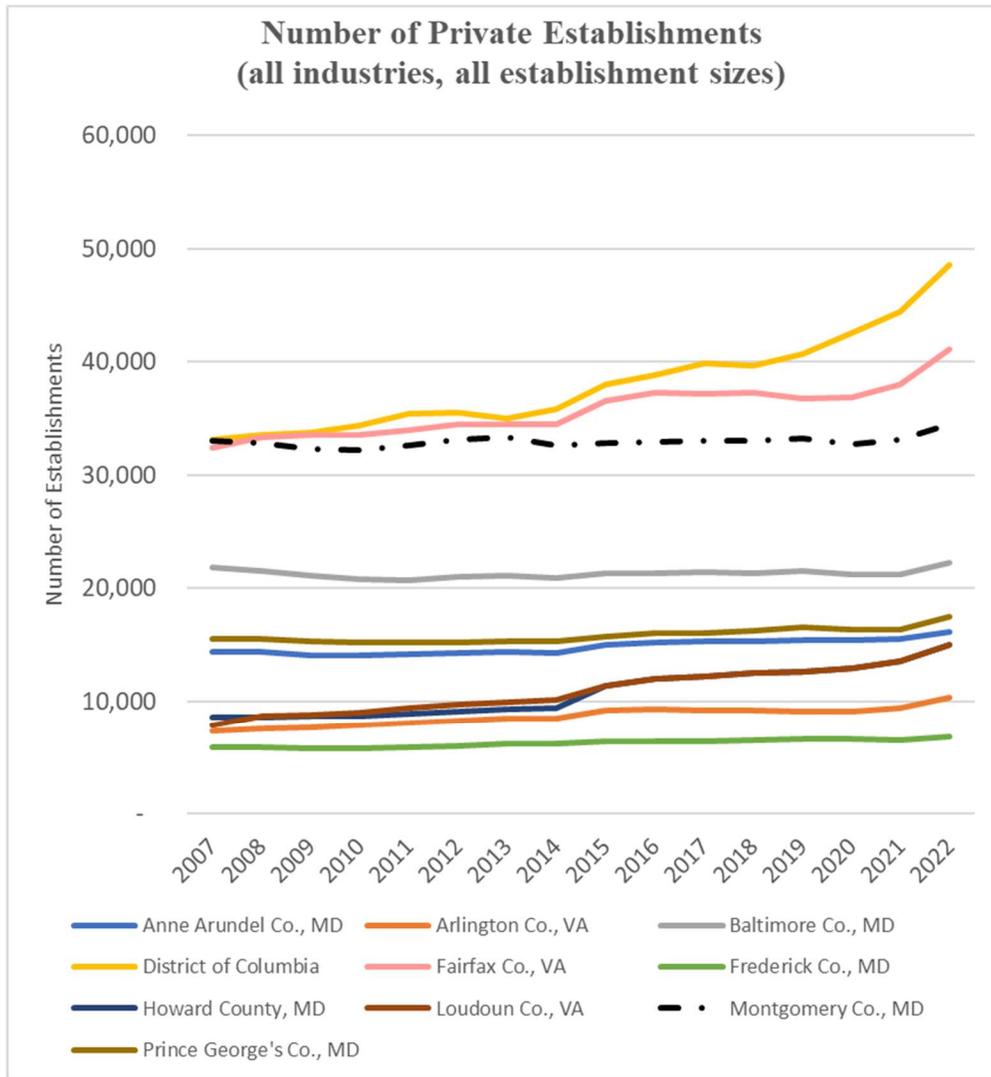
Quarterly Census of Employment and Wages (QCEW), Bureau of Labor Statistics, U.S. Department of Labor.³⁶

QCEW statistics are derived from tabulations of monthly employment and quarterly total wages of workers covered by public unemployment insurance. QCEW statistics are classified by place of work.

Current data and trends:

The data in Figure 3-10 and Table 3-10 show that Montgomery County recorded 34,513 private establishments in 2022, a 4.3 percent increase above the 2021 level, Montgomery County and all area jurisdictions exceeded their pre-pandemic 2019 levels of private establishments. Arlington County, Howard County, Loudoun County, each saw 2021 to 2022 increases near ten percent.

Figure 3-10. Number of Private Establishments (all industries, all est. sizes), 2007-2022.



Data source: Quarterly Census of Employment and Wages (QCEW), Bureau of Labor Statistics, U.S. Department of Labor

Table 3-10. Number of Private Establishments (all industries, all est. sizes), 2007-2022.

Number of Private Establishments (all industries, all sizes)

Source: Quarterly Census of Employment and Wages (QCEW), Bureau of Labor Statistics, U.S. Department of Labor

Series: Number of Establishments

Industry: Total, all industries

Owner: Private

Size: All establishment sizes

| FIPS | Name | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------|---------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| 24003 | Anne Arundel Co., MD | 14,344 | 14,345 | 14,125 | 14,074 | 14,144 | 14,288 | 14,444 | 14,330 |
| 51013 | Arlington Co., VA | 7,334 | 7,568 | 7,665 | 7,823 | 8,032 | 8,329 | 8,494 | 8,462 |
| 24005 | Baltimore Co., MD | 21,851 | 21,507 | 21,165 | 20,830 | 20,760 | 20,982 | 21,107 | 20,890 |
| 11000 | District of Columbia | 33,162 | 33,574 | 33,723 | 34,387 | 35,417 | 35,584 | 35,010 | 35,871 |
| 51059 | Fairfax Co., VA | 32,448 | 33,396 | 33,567 | 33,590 | 33,996 | 34,541 | 34,529 | 34,495 |
| 24021 | Frederick Co., MD | 5,935 | 5,888 | 5,785 | 5,797 | 5,931 | 6,044 | 6,161 | 6,183 |
| 24027 | Howard County, MD | 8,543 | 8,641 | 8,655 | 8,682 | 8,861 | 9,110 | 9,327 | 9,389 |
| 51107 | Loudoun Co., VA | 7,912 | 8,644 | 8,801 | 9,001 | 9,372 | 9,701 | 9,888 | 10,178 |
| 24031 | Montgomery Co., MD | 33,005 | 32,847 | 32,337 | 32,266 | 32,590 | 33,120 | 33,309 | 32,593 |
| 24033 | Prince George's Co., MD | 15,566 | 15,508 | 15,362 | 15,230 | 15,210 | 15,230 | 15,364 | 15,285 |

| | | | | | | | | | |
|-------|----------|---------|---------|---------|---------|---------|---------|---------|---------|
| 24000 | Maryland | 163,763 | 162,591 | 160,752 | 160,241 | 161,200 | 164,145 | 165,535 | 163,723 |
| 51000 | Virginia | 222,884 | 221,916 | 222,700 | 224,817 | 230,479 | 230,479 | 230,312 | 232,611 |

| FIPS | Name | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|--------------|---------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| 24003 | Anne Arundel Co., MD | 15,036 | 15,181 | 15,305 | 15,343 | 15,482 | 15,412 | 15,498 | 16,185 |
| 51013 | Arlington Co., VA | 9,221 | 9,348 | 9,226 | 9,205 | 9,132 | 9,143 | 9,448 | 10,382 |
| 24005 | Baltimore Co., MD | 21,318 | 21,373 | 21,395 | 21,359 | 21,516 | 21,204 | 21,213 | 22,248 |
| 11000 | District of Columbia | 37,997 | 38,866 | 39,939 | 39,695 | 40,713 | 42,535 | 44,401 | 48,564 |
| 51059 | Fairfax Co., VA | 36,590 | 37,312 | 37,195 | 37,276 | 36,766 | 36,839 | 37,985 | 41,142 |
| 24021 | Frederick Co., MD | 6,363 | 6,435 | 6,433 | 6,482 | 6,574 | 6,578 | 6,531 | 6,818 |
| 24027 | Howard County, MD | 11,395 | 11,987 | 12,244 | 12,575 | 12,677 | 12,933 | 13,591 | 14,965 |
| 51107 | Loudoun Co., VA | 11,395 | 11,987 | 12,244 | 12,575 | 12,677 | 12,933 | 13,591 | 14,965 |
| 24031 | Montgomery Co., MD | 32,862 | 32,962 | 33,044 | 33,041 | 33,242 | 32,753 | 33,103 | 34,513 |
| 24033 | Prince George's Co., MD | 15,751 | 16,015 | 16,099 | 16,230 | 16,568 | 16,397 | 16,408 | 17,478 |

| | | | | | | | | | |
|-------|----------|---------|---------|---------|---------|---------|---------|---------|---------|
| 24000 | Maryland | 168,788 | 170,931 | 172,188 | 173,354 | 176,160 | 174,807 | 176,625 | 189,482 |
| 51000 | Virginia | 254,270 | 264,329 | 270,073 | 278,349 | 280,066 | 282,884 | 297,191 | 327,821 |

Overview of Statistics Categorized by Industry Sector (Indicators #11-16)

The U.S. Office of Management and Budget (OMB) defines the industry categories, occupational groups, and geographic statistical areas used by federal statistical agencies. Federal statistical agencies report data on the U.S. economy using the North American Industry Classification System (NAICS), which categorizes the economy into 20 industry sectors. Federal statistical agencies also report economic data using the Standard Occupational Classification (SOC) system, which categorizes workers into 23 major occupational groups. Every industry sector employs workers from many occupational groups, and workers in an occupational group may be employed across many industry sectors.

Economic indicators in this report focus on two industry sectors likely to employ low-wage workers: Retail Trade (NAICS Sector 44-45), and Accommodation and Food Services (NAICS Sector 72).

**Economic Indicators #11-13:
Employment, Compensation, and Number of Establishments for the
Retail Trade Industry Sector (NAICS Sector 44-45)**

Definition:

The Retail Trade NAICS sector comprises establishments engaged in retailing merchandise as well as establishments offering services incidental to the sale of merchandise. This sector includes store and non-store retailers.

Store retailers operate fixed point-of-sale locations designed to attract a high volume of walk-in customers. As a general rule, establishments engaged in retailing merchandise and providing after sales services are classified in this sector.

Non-store retailers are also organized to serve the general public, but their retailing methods differ from store retailers. The establishments of this subsector reach customers and market merchandise with methods such as direct response advertising, paper and electronic catalogs, door-to-door solicitations, in-home demonstrations, selling from portable stalls (street vendors, except food), and distribution through vending machines. Establishments engaged in the direct sale (non-store) of products, such as home heating oil dealers and home delivery newspaper routes, are also included.³⁷

Indicators' relationship to the local economy and the minimum wage:

Industry data for the Retail Trade sector (NAICS Code 44-45) are included as economic indicators because that industry sector is likely to employ low-wage workers for whom the hourly rate would be lower in the absence of a minimum wage.

Figure 3-11 and Table 3-11 depict BEA statistics on employment (number of jobs) in the Retail Trade sector (NAICS Code 44-45) for 2007-2022.

Figure 3-12 and Table 3-12 depict BEA statistics on compensation to employees in the Retail Trade sector (NAICS Code 44-45) for 2007-2022. Note that dollars are shown in thousands.

Figure 3-13 and Table 3-13 depict BLS statistics on the number of private establishments of any size in the Retail Trade sector (NAICS Code 44-45) for 2007-2022.

Current data and trends:

For 2022, NAICS data on employment and establishments in the Retail Trade Sector show Montgomery County had 874 more jobs (up 1.7 percent) but 35 fewer private establishments (down 1.5 percent) than in 2021. While all regional jurisdictions experienced a rise in the number of retail jobs, Montgomery County's rate of increase was the smallest in the survey.

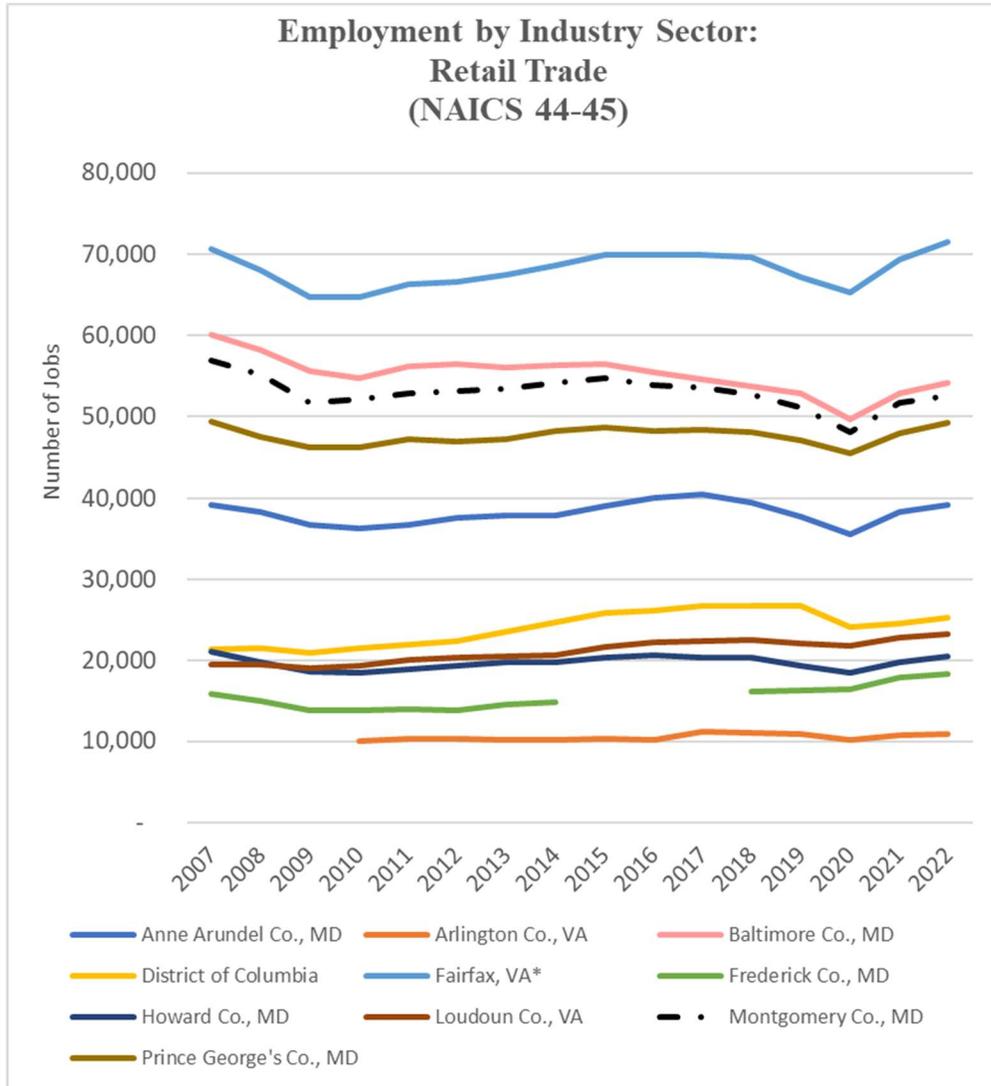
The decline in the number of retail establishments began before the pandemic in most jurisdictions and accelerated during the pandemic-driven economic disruptions. Most regional jurisdictions experienced an increase in retail establishments from 2021 to 2022. Only Montgomery County, Anne Arundel County (down 0.3 percent), and Baltimore County (down 0.3 percent) saw a decrease in retail establishments during that time period.

Compared to the previous year, the 2022 NAICS data for compensation to employees in the Retail Trade Sector show Montgomery County's compensation for employees in the retail trade industry increased \$106.4 million (up 4.9 percent) from the 2021 pandemic-influenced level.

Sources of data:

Regional Economic Accounts, Bureau of Economic Analysis (BEA), U.S. Department of Commerce³⁸ and the U.S. Bureau of Labor Statistics.³⁹

Figure 3-11. Employment by Industry Sector: Retail Trade (NAICS 44-45), 2007-2022.



*BEA modifies the FIPS Codes to combine Fairfax County (FIPS 51059), Fairfax City (FIPS 51600) and Falls Church (FIPS 51610) into a single FIPS Code 51919. Separate estimates for the jurisdictions making up 51919 are not available. Data source: Regional Economic Accounts, Bureau of Economic Analysis (BEA), U.S. Department of Commerce.

Table 3-11. Employment by Industry Sector: Retail Trade (NAICS 44-45), 2007-2022.

Private Non-Farm Employment: Retail Trade (Number of Jobs) NAICS Sector 44-45

CAEMP25N Total Full-Time and Part-Time Employment by NAICS Industry 1/

Regional Economic Data, Bureau of Economic Analysis, U.S. Department of Commerce

| FIPS | Name | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------|---------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| 24003 | Anne Arundel Co., MD | 39,233 | 38,339 | 36,680 | 36,287 | 36,773 | 37,632 | 37,883 | 37,910 |
| 51013 | Arlington Co., VA | 10,664 | (D) | (D) | 9,967 | 10,302 | 10,338 | 10,154 | 10,176 |
| 24005 | Baltimore Co., MD | 60,059 | 58,252 | 55,606 | 54,828 | 56,134 | 56,518 | 56,063 | 56,302 |
| 11000 | District of Columbia | 21,424 | 21,573 | 21,020 | 21,593 | 22,059 | 22,494 | 23,545 | 24,710 |
| 51919 | Fairfax, VA* | 70,570 | 68,029 | 64,749 | 64,674 | 66,255 | 66,605 | 67,521 | 68,554 |
| 24021 | Frederick Co., MD | 15,977 | 14,996 | 13,931 | 13,845 | 14,076 | 13,870 | 14,562 | 14,847 |
| 24027 | Howard Co., MD | 21,073 | 19,833 | 18,646 | 18,579 | 18,904 | 19,410 | 19,847 | 19,818 |
| 51107 | Loudoun Co., VA | 19,499 | 19,584 | 19,060 | 19,402 | 20,116 | 20,446 | 20,481 | 20,756 |
| 24031 | Montgomery Co., MD | 56,885 | 55,261 | 51,712 | 52,157 | 52,830 | 53,114 | 53,418 | 54,211 |
| 24033 | Prince George's Co., MD | 49,390 | 47,528 | 46,285 | 46,267 | 47,231 | 46,912 | 47,213 | 48,307 |

| | | | | | | | | | |
|-------|----------|---------|---------|---------|---------|---------|---------|---------|---------|
| 24000 | Maryland | 362,543 | 350,624 | 334,361 | 330,859 | 337,724 | 340,102 | 340,102 | 341,932 |
| 51000 | Virginia | 508,576 | 495,859 | 474,222 | 469,984 | 478,681 | 481,663 | 488,364 | 492,920 |

| FIPS | Name | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|--------------|---------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| 24003 | Anne Arundel Co., MD | 38,969 | 40,068 | 40,434 | 39,498 | 37,777 | 35,528 | 38,352 | 39,180 |
| 51013 | Arlington Co., VA | 10,340 | 10,171 | 11,145 | 10,974 | 10,828 | 10,163 | 10,660 | 10,911 |
| 24005 | Baltimore Co., MD | 56,469 | 55,492 | 54,633 | 53,769 | 52,827 | 49,715 | 52,946 | 54,252 |
| 11000 | District of Columbia | 25,842 | 26,128 | 26,794 | 26,775 | 26,750 | 24,204 | 24,559 | 25,358 |
| 51919 | Fairfax, VA* | 69,945 | 69,879 | 69,876 | 69,690 | 67,209 | 65,311 | 69,291 | 71,517 |
| 24021 | Frederick Co., MD | (D) | (D) | (D) | 16,265 | 16,358 | 16,464 | 17,963 | 18,389 |
| 24027 | Howard Co., MD | 20,338 | 20,717 | 20,372 | 20,356 | 19,391 | 18,499 | 19,881 | 20,526 |
| 51107 | Loudoun Co., VA | 21,719 | 22,258 | 22,388 | 22,564 | 22,074 | 21,808 | 22,823 | 23,289 |
| 24031 | Montgomery Co., MD | 54,768 | 53,926 | 53,655 | 52,807 | 51,196 | 48,177 | 51,748 | 52,622 |
| 24033 | Prince George's Co., MD | 48,748 | 48,291 | 48,386 | 48,168 | 47,045 | 45,501 | 47,998 | 49,261 |

| | | | | | | | | | |
|-------|----------|---------|---------|---------|---------|---------|---------|---------|---------|
| 24000 | Maryland | 348,697 | 347,350 | 346,825 | 342,215 | 333,787 | 320,156 | 343,556 | 351,570 |
| 51000 | Virginia | 500,369 | 501,495 | 503,345 | 496,900 | 484,722 | 487,579 | 507,333 | 519,275 |

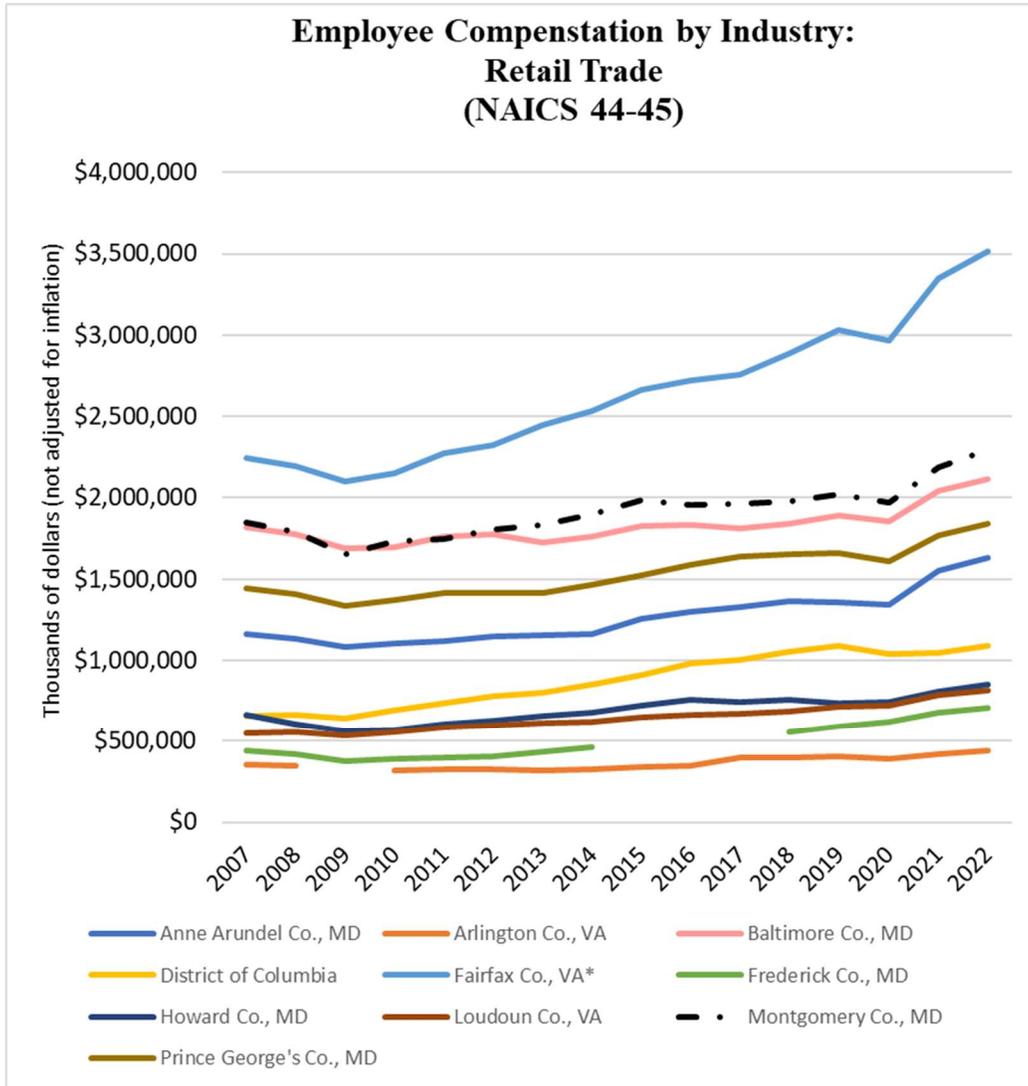
1/ The estimates of employment for 2001-2006 are based on the 2002 NAICS. The estimates for 2007-2010 are based on the 2007 NAICS. The estimates for 2011-2016 are based on the 2012 NAICS. The estimates for 2017 forward are based on the 2017 NAICS.

* BEA modifies the FIPS Codes to combine Fairfax County (FIPS 51059), Fairfax City (FIPS 51600) and Falls Church (FIPS 51610) into a single FIPS Code 51919; Separate estimates are not available

(D) Not shown to avoid disclosure of confidential information; estimates are included in higher-level totals.

Last updated: November 16, 2023-- new statistics for 2022; revised statistics for 2007-2021.

Figure 3-12. Compensation of Employees by Industry Sector: Retail Trade (NAICS 44-45), 2007-2022.



*BEA modifies the FIPS Codes to combine Fairfax County (FIPS 51059), Fairfax City (FIPS 51600) and Falls Church (FIPS 51610) into a single FIPS Code 51919. Separate estimates for the jurisdictions making up 51919 are not available. Data source: Regional Economic Accounts, Bureau of Economic Analysis (BEA), U.S. Department of Commerce.

Table 3-12. Compensation of Employees by Industry Sector: Retail Trade (NAICS 44-45), 2007-2022.

Private Non-Farm Compensation, Retail Trade (NAICS Sector 44-45)

(Thousands of Dollars)

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

CAINC6N Compensation of Employees by NAICS Industry

| FIPS | Name | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------|---------------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|
| 24003 | Anne Arundel Co., MD | \$1,161,111 | \$1,133,482 | \$1,085,019 | \$1,105,769 | \$1,120,209 | \$1,147,229 | \$1,158,634 | \$1,163,212 |
| 51013 | Arlington Co., VA | \$350,946 | \$350,045 | (D) | \$321,755 | \$326,062 | \$328,766 | \$319,437 | \$325,618 |
| 24005 | Baltimore Co., MD | \$1,819,459 | \$1,776,877 | \$1,692,049 | \$1,697,468 | \$1,759,900 | \$1,774,505 | \$1,725,784 | \$1,762,843 |
| 11001 | District of Columbia | \$659,036 | \$662,869 | \$639,463 | \$696,773 | \$740,232 | \$778,204 | \$801,680 | \$854,511 |
| 51919 | Fairfax Co., VA* | \$2,248,827 | \$2,194,400 | \$2,102,240 | \$2,151,654 | \$2,276,467 | \$2,328,161 | \$2,450,316 | \$2,530,883 |
| 24021 | Frederick Co., MD | \$442,420 | \$416,475 | \$377,649 | \$392,819 | \$399,701 | \$401,229 | \$432,013 | \$462,304 |
| 24027 | Howard Co., MD | \$661,581 | \$607,674 | \$566,531 | \$574,113 | \$603,918 | \$628,627 | \$657,150 | \$676,644 |
| 51107 | Loudoun Co., VA | \$552,054 | \$556,795 | \$534,472 | \$556,613 | \$582,621 | \$600,542 | \$617,347 | \$620,702 |
| 24031 | Montgomery Co., MD | \$1,846,207 | \$1,789,097 | \$1,655,705 | \$1,730,909 | \$1,749,842 | \$1,802,212 | \$1,836,267 | \$1,896,714 |
| 24033 | Prince George's Co., MD | \$1,444,220 | \$1,405,617 | \$1,335,797 | \$1,369,922 | \$1,414,448 | \$1,414,830 | \$1,411,973 | \$1,464,146 |

| | | | | | | | | | |
|-------|----------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 24000 | Maryland | \$10,352,208 | \$10,046,524 | \$9,505,215 | \$9,678,250 | \$9,943,553 | \$10,112,426 | \$10,201,708 | \$10,480,816 |
| 51000 | Virginia | \$13,177,835 | \$13,064,765 | \$12,578,542 | \$12,673,569 | \$12,922,997 | \$13,230,410 | \$13,693,129 | \$13,983,359 |

| FIPS | Name | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|--------------|---------------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|
| 24003 | Anne Arundel Co., MD | \$1,259,682 | \$1,300,666 | \$1,330,445 | \$1,361,962 | \$1,355,209 | \$1,340,664 | \$1,553,343 | \$1,628,949 |
| 51013 | Arlington Co., VA | \$339,781 | \$348,551 | \$394,954 | \$394,530 | \$403,176 | \$390,056 | \$420,187 | \$444,398 |
| 24005 | Baltimore Co., MD | \$1,830,036 | \$1,832,413 | \$1,808,862 | \$1,841,099 | \$1,891,482 | \$1,852,993 | \$2,040,149 | \$2,115,362 |
| 11001 | District of Columbia | \$911,874 | \$981,824 | \$1,004,704 | \$1,051,308 | \$1,088,022 | \$1,037,870 | \$1,050,247 | \$1,088,527 |
| 51919 | Fairfax Co., VA* | \$2,662,651 | \$2,722,283 | \$2,755,125 | \$2,885,902 | \$3,030,237 | \$2,965,310 | \$3,349,433 | \$3,514,815 |
| 24021 | Frederick Co., MD | (D) | (D) | (D) | \$555,993 | \$590,396 | \$617,774 | \$676,421 | \$705,928 |
| 24027 | Howard Co., MD | \$720,113 | \$755,196 | \$744,292 | \$755,649 | \$739,870 | \$745,180 | \$810,451 | \$849,549 |
| 51107 | Loudoun Co., VA | \$650,730 | \$664,470 | \$673,884 | \$686,641 | \$716,905 | \$720,466 | \$789,318 | \$816,795 |
| 24031 | Montgomery Co., MD | \$1,983,941 | \$1,953,974 | \$1,964,556 | \$1,978,745 | \$2,024,525 | \$1,970,111 | \$2,187,439 | \$2,293,871 |
| 24033 | Prince George's Co., MD | \$1,526,775 | \$1,586,589 | \$1,638,141 | \$1,653,230 | \$1,658,419 | \$1,613,059 | \$1,765,849 | \$1,843,171 |

| | | | | | | | | | |
|-------|----------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 24000 | Maryland | \$10,978,585 | \$11,145,552 | \$11,232,889 | \$11,430,648 | \$11,671,927 | \$11,602,274 | \$12,877,106 | \$13,435,187 |
| 51000 | Virginia | \$14,503,858 | \$14,689,726 | \$14,953,760 | \$15,290,097 | \$15,834,601 | \$16,336,401 | \$18,000,522 | \$18,820,728 |

All dollar estimates are in thousands of current dollars (not adjusted for inflation).

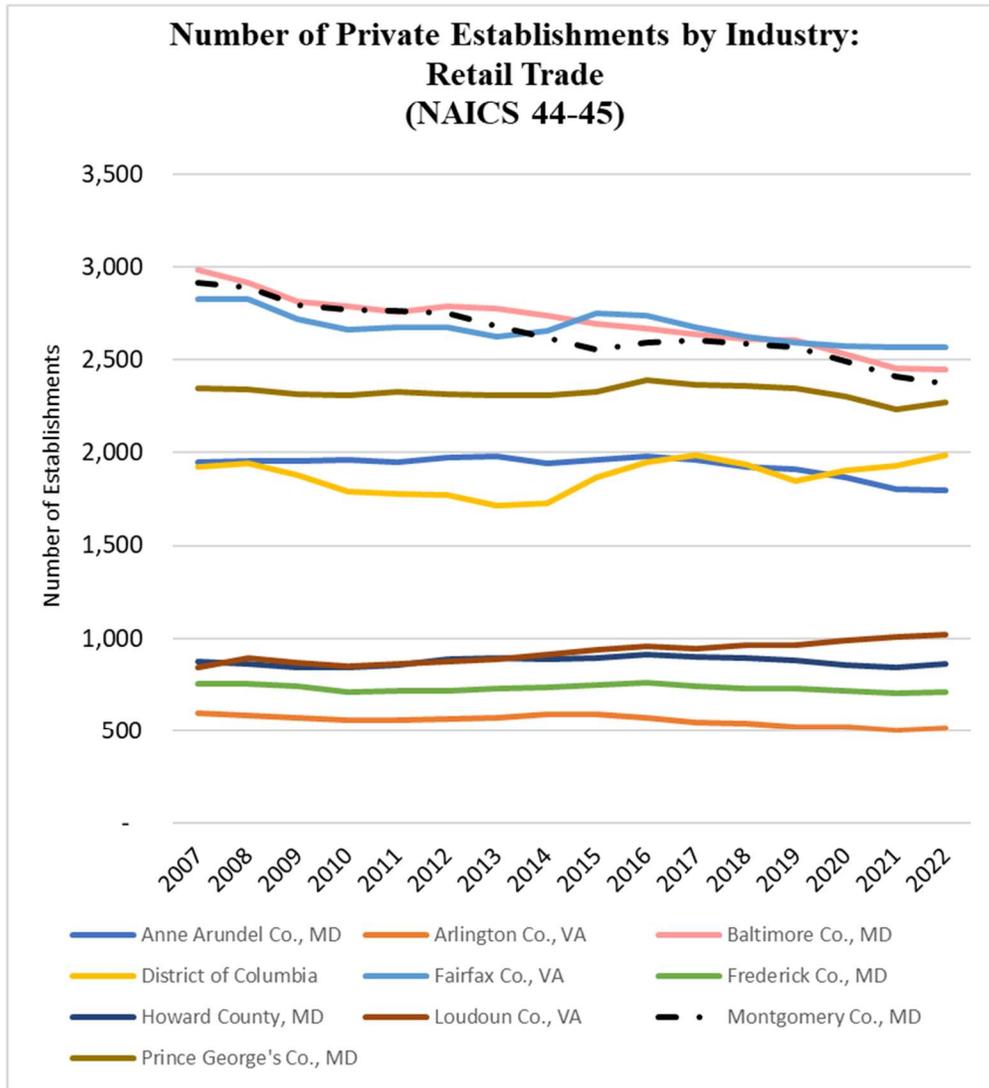
The estimates for 2011-2016 are based on the 2012 NAICS. The estimates for 2017 forward are based on the 2017 NAICS.

* BEA modifies the FIPS Codes to combine Fairfax County (FIPS 51059), Fairfax City (FIPS 51600) and Falls Church (FIPS 51610) into a single FIPS Code 51919; Separate estimates are not available

(D) Not shown to avoid disclosure of confidential information; estimates are included in higher-level totals.

Last updated: November 16, 2023-- new statistics for 2022; revised statistics for 2007-2021.

Figure 3-13. Number of Establishments by Industry: Retail Trade (NAICS 44-45), 2007-2022



Data source: Quarterly Census of Employment and Wages (QCEW), Bureau of Labor Statistics, U.S. Department of Labor

Table 3-13. Number of Establishments by Industry: Retail Trade (NAICS 44-45), 2006-2021.

Number of Establishments by Industry: Retail Trade (NAICS44-45) for all establishment sizes

Source: Quarterly Census of Employment and Wages (QCEW), Bureau of Economic Analysis, U.S. Department of Commerce

Industry: NAICS 44-45 Retail Trade

Owner: Private

Size: All establishment sizes

| FIPS | Name | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------|---------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 24003 | Anne Arundel Co., MD | 1,948 | 1,957 | 1,956 | 1,960 | 1,952 | 1,974 | 1,978 | 1,941 |
| 51013 | Arlington Co., VA | 596 | 587 | 569 | 560 | 560 | 566 | 571 | 588 |
| 24005 | Baltimore Co., MD | 2,986 | 2,917 | 2,813 | 2,787 | 2,760 | 2,787 | 2,774 | 2,738 |
| 11000 | District of Columbia | 1,921 | 1,945 | 1,877 | 1,788 | 1,777 | 1,773 | 1,716 | 1,728 |
| 51059 | Fairfax Co., VA | 2,828 | 2,827 | 2,721 | 2,664 | 2,676 | 2,674 | 2,624 | 2,654 |
| 24021 | Frederick Co., MD | 754 | 757 | 740 | 713 | 718 | 720 | 731 | 739 |
| 24027 | Howard County, MD | 875 | 862 | 844 | 842 | 858 | 887 | 892 | 889 |
| 51107 | Loudoun Co., VA | 844 | 892 | 867 | 849 | 862 | 874 | 891 | 911 |
| 24031 | Montgomery Co., MD | 2,913 | 2,887 | 2,796 | 2,770 | 2,761 | 2,750 | 2,682 | 2,616 |
| 24033 | Prince George's Co., MD | 2,344 | 2,343 | 2,317 | 2,309 | 2,326 | 2,317 | 2,308 | 2,311 |

| | | | | | | | | | |
|-------|----------|--------|--------|--------|--------|--------|--------|--------|--------|
| 24000 | Maryland | 19,661 | 19,523 | 19,148 | 18,928 | 18,938 | 18,985 | 18,887 | 18,610 |
| 51000 | Virginia | 27,050 | 27,110 | 26,403 | 25,928 | 25,784 | 25,776 | 25,553 | 25,483 |

| FIPS | Name | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|--------------|---------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 24003 | Anne Arundel Co., MD | 1,963 | 1,980 | 1,960 | 1,921 | 1,912 | 1,865 | 1,801 | 1,796 |
| 51013 | Arlington Co., VA | 588 | 570 | 545 | 539 | 521 | 520 | 505 | 517 |
| 24005 | Baltimore Co., MD | 2,696 | 2,672 | 2,636 | 2,612 | 2,603 | 2,527 | 2,455 | 2,447 |
| 11000 | District of Columbia | 1,869 | 1,947 | 1,986 | 1,939 | 1,848 | 1,903 | 1,933 | 1,989 |
| 51059 | Fairfax Co., VA | 2,754 | 2,740 | 2,673 | 2,624 | 2,593 | 2,573 | 2,570 | 2,571 |
| 24021 | Frederick Co., MD | 752 | 763 | 742 | 733 | 731 | 718 | 705 | 708 |
| 24027 | Howard County, MD | 895 | 911 | 902 | 897 | 884 | 858 | 844 | 864 |
| 51107 | Loudoun Co., VA | 941 | 956 | 946 | 966 | 962 | 986 | 1,008 | 1,022 |
| 24031 | Montgomery Co., MD | 2,558 | 2,591 | 2,604 | 2,584 | 2,565 | 2,491 | 2,408 | 2,373 |
| 24033 | Prince George's Co., MD | 2,327 | 2,391 | 2,364 | 2,359 | 2,344 | 2,303 | 2,233 | 2,268 |

| | | | | | | | | | |
|-------|----------|--------|--------|--------|--------|--------|--------|--------|--------|
| 24000 | Maryland | 18,562 | 18,719 | 18,561 | 18,434 | 18,352 | 17,884 | 17,399 | 17,593 |
| 51000 | Virginia | 26,104 | 26,089 | 25,901 | 25,844 | 25,546 | 25,506 | 25,886 | 26,084 |

**Economic Indicators #14-16:
Employment, Compensation, and Number of Establishments for
Accommodation and Food Services Industry Sector (NAICS Sector 72)**

Definition:

The Accommodation and Food Services NAICS sector comprises establishments providing customers with lodging, meals, snacks, and/or beverages for immediate consumption. The sector includes both accommodation and food services establishments because those activities may be combined at the same establishment.⁴⁰

Indicators' relationship to the local economy and the minimum wage:

Industry statistics for the Accommodation and Food Services sector (NAICS Code 72) are included as economic indicators because that industry sector is likely to employ low wage workers whose hourly rate would be lower in the absence of a minimum wage.

Figure 3-14 and Table 3-14 depict BEA statistics on employment (number of jobs) in the Accommodation and Food Services sector (NAICS Code 72) for 2007-2022.

Figure 3-15 and Table 3-15 depict BEA statistics on compensation to employees in the Accommodation and Food Services sector (NAICS Code 72) for 2007-2022. Note that dollars are in thousands.

Figure 3-16 and Table 3-16 depict BLS statistics on the number of private establishments of any size in the Accommodation and Food Services sector (NAICS Code 72) for 2007-2022.

Current data and trends:

For 2022, NAICS data on employment and establishments in the Accommodation and Food Services sector show Montgomery County had 3,433 more jobs (up 10.6 percent) and 50 more private establishments (up 2.7 percent) compared to 2021. From 2021 to 2022, all regional jurisdictions experienced a rise in the number of Accommodation and Food Services jobs, with the largest rate of increase occurring in the District of Columbia (up 34.5 percent) and the smallest rates of increase occurring in Anne Arundel and Baltimore Counties (both up 6.4 percent).

The 2022 NAICS data show a reversal in the decline in the number of Accommodation and Food Services establishments during the pandemic. From 2021 to 2022, all regional jurisdictions (except Anne Arundel County) experienced a rise in the number of Accommodation and Food Services establishments, with the largest rate of increase occurring in Fairfax County (up 6.4 percent) and the smallest rate of increase occurring in Prince George's County (up 0.8 percent).

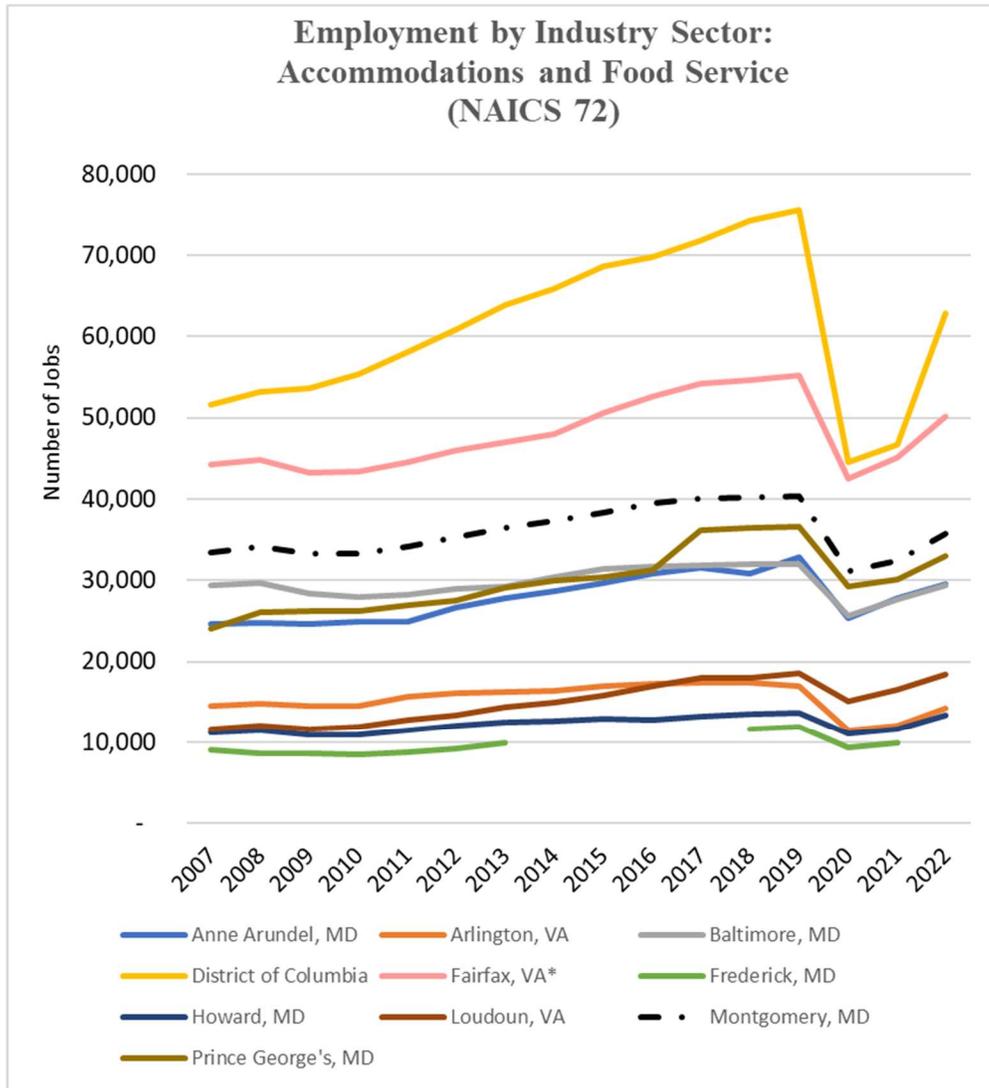
Compared to the previous year, the 2022 NAICS data show that compensation in the Accommodation and Food Services Sector for employees in Montgomery County increased \$233.3 million (up 20.4 percent) from the 2021 pandemic-influenced level.

Source of data:

Statistics on employment (number of jobs) and employee compensation comes from the Regional Economic Accounts, Bureau of Economic Analysis (BEA), U.S. Department of Commerce.⁴¹

Statistics on the number of establishments come from the Quarterly Census of Employment and Wages (QCEW), Bureau of Labor Statistics, U.S. Department of Labor.⁴² QCEW statistics are derived from tabulations of monthly employment and quarterly total wages of workers covered by public unemployment insurance. QCEW statistics are classified by place of work.

Figure 3-14. Employment by Industry: Accommodation & Food Services (NAICS 72), 2007-2022.



*BEA modifies the FIPS Codes to combine Fairfax County (FIPS 51059), Fairfax City (FIPS 51600) and Falls Church (FIPS 51610) into a single FIPS Code 51919. Separate estimates for the jurisdictions making up 51919 are not available. Data source: Regional Economic Accounts, Bureau of Economic Analysis (BEA), U.S. Department of Commerce.

Table 3-14. Employment by Industry: Accommodation & Food Services (NAICS 72), 2007-2022.

Private Non-Farm Employment: Accommodation & Food Service (Number of Jobs) NAICS Sector 72

CAEMP25N Total Full-Time and Part-Time Employment by NAICS Industry 1/

Regional Economic Data, Bureau of Economic Analysis, U.S. Department of Commerce

| FIPS | Name | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------|-----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| 24003 | Anne Arundel, MD | 24,644 | 24,803 | 24,633 | 24,913 | 24,960 | 26,645 | 27,859 | 28,600 |
| 51013 | Arlington, VA | 14,494 | 14,839 | 14,498 | 14,592 | 15,605 | 16,145 | 16,319 | 16,384 |
| 24005 | Baltimore, MD | 29,396 | 29,680 | 28,317 | 27,905 | 28,265 | 28,982 | 29,239 | 30,356 |
| 11000 | District of Columbia | 51,609 | 53,218 | 53,607 | 55,375 | 58,094 | 60,823 | 63,849 | 65,860 |
| 51919 | Fairfax, VA* | 44,211 | 44,807 | 43,313 | 43,456 | 44,608 | 46,001 | 46,933 | 47,988 |
| 24021 | Frederick, MD | 9,019 | 8,614 | 8,562 | 8,396 | 8,762 | 9,188 | 9,882 | (D) |
| 24027 | Howard, MD | 11,201 | 11,440 | 10,848 | 10,972 | 11,503 | 12,063 | 12,560 | 12,700 |
| 51107 | Loudoun, VA | 11,586 | 12,019 | 11,574 | 11,885 | 12,762 | 13,382 | 14,327 | 14,923 |
| 24031 | Montgomery, MD | 33,411 | 34,136 | 33,291 | 33,303 | 34,106 | 35,275 | 36,440 | 37,387 |
| 24033 | Prince George's, MD | 24,033 | 26,041 | 26,234 | 26,233 | 26,875 | 27,540 | 29,035 | 29,966 |

| | | | | | | | | | |
|-------|----------|---------|---------|---------|---------|---------|---------|---------|---------|
| 24000 | Maryland | 212,654 | 215,136 | 210,368 | 209,486 | 214,167 | 222,362 | 229,814 | 235,156 |
| 51000 | Virginia | 317,527 | 320,770 | 313,871 | 313,576 | 322,396 | 329,873 | 336,965 | 344,219 |

| FIPS | Name | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|--------------|-----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| 24003 | Anne Arundel, MD | 29,645 | 30,790 | 31,520 | 30,864 | 32,880 | 25,311 | 27,739 | 29,518 |
| 51013 | Arlington, VA | 16,944 | 17,282 | 17,366 | 17,339 | 16,935 | 11,496 | 12,068 | 14,263 |
| 24005 | Baltimore, MD | 31,347 | 31,740 | 31,839 | 31,993 | 32,030 | 25,568 | 27,621 | 29,397 |
| 11000 | District of Columbia | 68,675 | 69,824 | 71,897 | 74,293 | 75,655 | 44,564 | 46,717 | 62,847 |
| 51919 | Fairfax, VA* | 50,636 | 52,633 | 54,178 | 54,645 | 55,291 | 42,454 | 45,166 | 50,117 |
| 24021 | Frederick, MD | (D) | (D) | (D) | 11,604 | 11,885 | 9,351 | 9,967 | (D) |
| 24027 | Howard, MD | 12,878 | 12,722 | 13,226 | 13,448 | 13,692 | 11,021 | 11,644 | 13,424 |
| 51107 | Loudoun, VA | 15,886 | 17,014 | 17,918 | 18,014 | 18,552 | 15,072 | 16,491 | 18,348 |
| 24031 | Montgomery, MD | 38,375 | 39,455 | 40,106 | 40,245 | 40,290 | 31,132 | 32,376 | 35,809 |
| 24033 | Prince George's, MD | 30,440 | 31,321 | 36,176 | 36,494 | 36,656 | 29,251 | 30,147 | 33,017 |

| | | | | | | | | | |
|-------|----------|---------|---------|---------|---------|---------|---------|---------|---------|
| 24000 | Maryland | 241,463 | 246,650 | 255,759 | 256,856 | 260,433 | 204,950 | 219,504 | 235,416 |
| 51000 | Virginia | 355,761 | 367,764 | 376,396 | 379,938 | 381,502 | 311,383 | 334,572 | 361,453 |

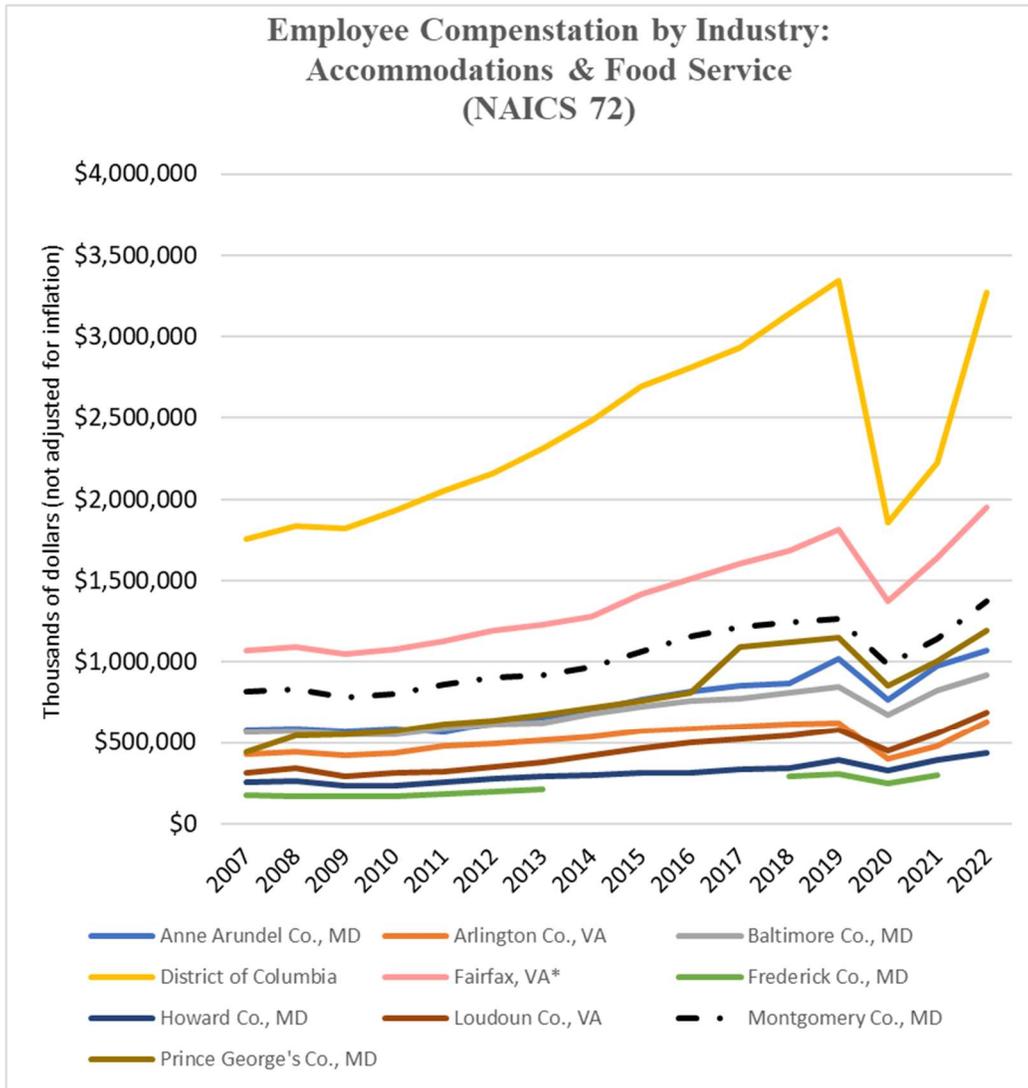
1/ The estimates of employment for 2001-2006 are based on the 2002 NAICS. The estimates for 2007-2010 are based on the 2007 NAICS. The estimates for 2011-2016 are based on the 2012 NAICS. The estimates for 2017 forward are based on the 2017 NAICS.

* BEA modifies the FIPS Codes to combine Fairfax County (FIPS 51059), Fairfax City (FIPS 51600) and Falls Church (FIPS 51610) into a single FIPS Code 51919; Separate estimates are not available

(D) Not shown to avoid disclosure of confidential information; estimates are included in higher-level totals.

Last updated: November 16, 2023-- new statistics for 2022; revised statistics for 2007-2020.

Figure 3-15. Compensation of Employees by Industry: Accommodation & Food Services, 2007-2022.



*BEA modifies the FIPS Codes to combine Fairfax County (FIPS 51059), Fairfax City (FIPS 51600) and Falls Church (FIPS 51610) into a single FIPS Code 51919. Separate estimates for the jurisdictions making up 51919 are not available. Data source: Regional Economic Accounts, Bureau of Economic Analysis (BEA), U.S. Department of Commerce.

Table 3-15. Compensation of Employees by Industry: Accommodation & Food Services (NAICS 72), 2007-2022.

Private Non-Farm Compensation, Accommodations & Food Service (NAICS Sector 72)

(Thousands of Dollars)

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

CAINC6N Compensation of Employees by NAICS Industry

| FIPS | Name | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------|---------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 24003 | Anne Arundel Co., MD | \$578,925 | \$586,957 | \$575,929 | \$590,065 | \$564,196 | \$625,887 | \$660,800 | \$700,508 |
| 51013 | Arlington Co., VA | \$425,439 | \$440,669 | \$423,290 | \$433,834 | \$476,229 | \$495,234 | \$513,302 | \$536,256 |
| 24005 | Baltimore Co., MD | \$567,931 | \$576,231 | \$550,512 | \$554,524 | \$585,682 | \$617,143 | \$623,409 | \$679,276 |
| 11001 | District of Columbia | \$1,753,170 | \$1,832,169 | \$1,820,253 | \$1,929,956 | \$2,049,288 | \$2,162,907 | \$2,309,266 | \$2,488,288 |
| 51919 | Fairfax, VA* | \$1,069,142 | \$1,088,936 | \$1,048,828 | \$1,076,396 | \$1,127,384 | \$1,194,381 | \$1,227,904 | \$1,283,551 |
| 24021 | Frederick Co., MD | \$174,481 | \$168,564 | \$169,191 | \$169,089 | \$180,937 | \$196,462 | \$212,406 | (D) |
| 24027 | Howard Co., MD | \$254,591 | \$261,308 | \$233,657 | \$236,149 | \$256,849 | \$279,897 | \$292,225 | \$300,089 |
| 51107 | Loudoun Co., VA | \$314,996 | \$338,947 | \$292,494 | \$312,316 | \$321,806 | \$346,298 | \$378,559 | \$423,070 |
| 24031 | Montgomery Co., MD | \$815,092 | \$830,661 | \$781,297 | \$800,269 | \$862,706 | \$902,386 | \$922,367 | \$968,462 |
| 24033 | Prince George's Co., MD | \$440,014 | \$543,068 | \$548,555 | \$575,504 | \$613,499 | \$637,833 | \$672,360 | \$714,353 |

| | | | | | | | | | |
|-------|----------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| 24000 | Maryland | \$4,432,888 | \$4,570,513 | \$4,443,612 | \$4,523,362 | \$4,734,657 | \$5,089,503 | \$5,268,851 | \$5,556,706 |
| 51000 | Virginia | \$6,173,265 | \$6,328,314 | \$6,166,860 | \$6,277,085 | \$6,548,678 | \$6,973,777 | \$7,202,219 | \$7,579,466 |

| FIPS | Name | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|--------------|---------------------------|--------------------|--------------------|--------------------|--------------------|--------------------|------------------|--------------------|--------------------|
| 24003 | Anne Arundel Co., MD | \$768,409 | \$817,083 | \$851,446 | \$868,961 | \$1,018,615 | \$764,582 | \$977,446 | \$1,068,943 |
| 51013 | Arlington Co., VA | \$573,533 | \$590,367 | \$604,826 | \$617,421 | \$622,883 | \$402,142 | \$478,734 | \$627,043 |
| 24005 | Baltimore Co., MD | \$727,060 | \$758,318 | \$772,107 | \$814,385 | \$846,759 | \$672,890 | \$823,780 | \$920,982 |
| 11001 | District of Columbia | \$2,692,369 | \$2,810,738 | \$2,933,414 | \$3,138,691 | \$3,342,793 | \$1,857,791 | \$2,228,486 | \$3,272,392 |
| 51919 | Fairfax, VA* | \$1,414,498 | \$1,508,599 | \$1,608,254 | \$1,687,394 | \$1,813,930 | \$1,371,518 | \$1,640,060 | \$1,949,239 |
| 24021 | Frederick Co., MD | (D) | (D) | (D) | \$288,298 | \$305,483 | \$247,434 | \$298,897 | (D) |
| 24027 | Howard Co., MD | \$309,891 | \$313,456 | \$333,967 | \$344,941 | \$392,656 | \$324,970 | \$389,134 | \$437,390 |
| 51107 | Loudoun Co., VA | \$465,499 | \$498,155 | \$520,818 | \$541,292 | \$576,340 | \$449,421 | \$561,188 | \$690,436 |
| 24031 | Montgomery Co., MD | \$1,061,068 | \$1,156,458 | \$1,213,711 | \$1,245,429 | \$1,263,416 | \$987,289 | \$1,141,223 | \$1,374,536 |
| 24033 | Prince George's Co., MD | \$758,692 | \$814,266 | \$1,089,130 | \$1,119,377 | \$1,149,733 | \$857,237 | \$1,005,524 | \$1,192,023 |

| | | | | | | | | | |
|-------|----------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| 24000 | Maryland | \$5,986,712 | \$6,331,813 | \$6,828,985 | \$7,077,102 | \$7,451,257 | \$5,836,293 | \$7,105,699 | \$8,010,256 |
| 51000 | Virginia | \$8,180,072 | \$8,639,113 | \$8,983,265 | \$9,336,788 | \$9,758,600 | \$7,937,198 | \$9,849,657 | \$11,488,177 |

All dollar estimates are in thousands of current dollars (not adjusted for inflation).

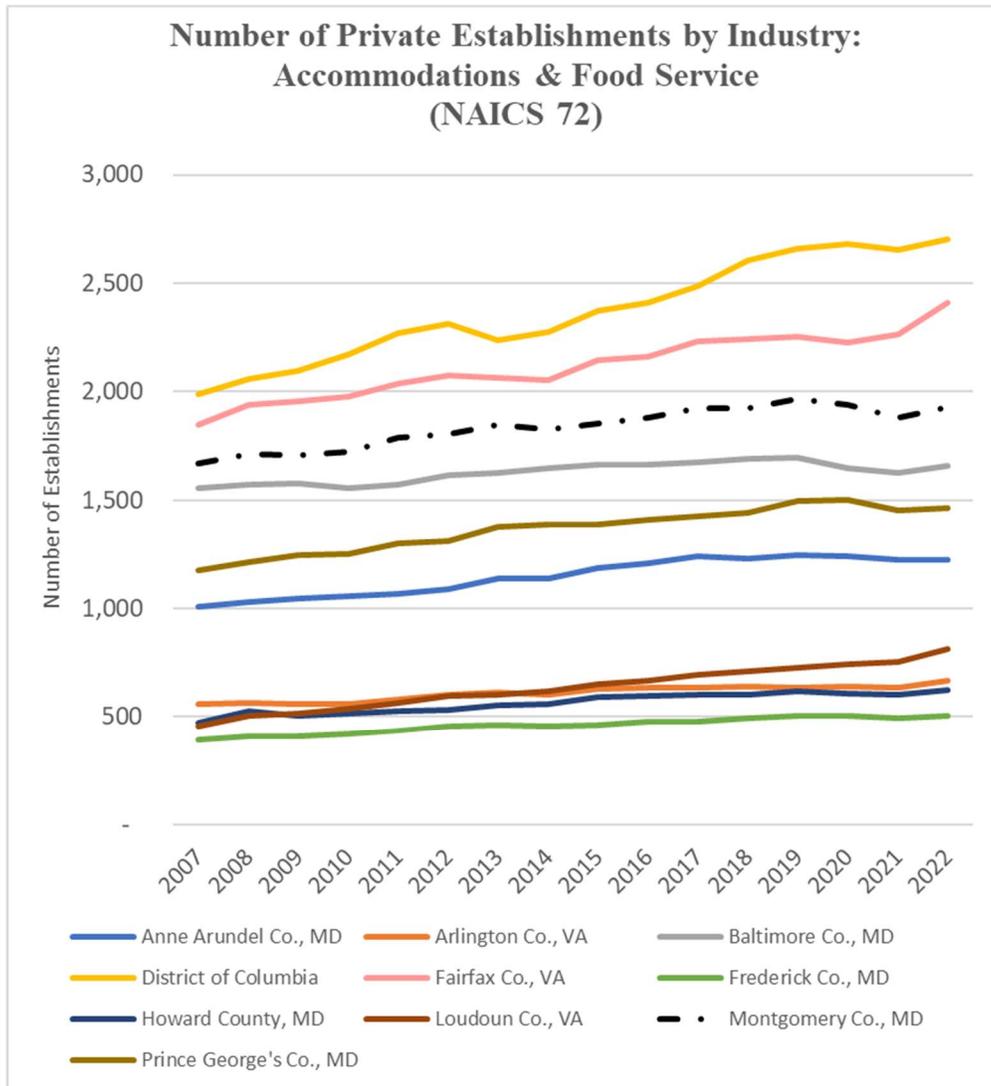
The estimates for 2011-2016 are based on the 2012 NAICS. The estimates for 2017 forward are based on the 2017 NAICS.

* BEA modifies the FIPS Codes to combine Fairfax County (FIPS 51059), Fairfax City (FIPS 51600) and Falls Church (FIPS 51610) into a single FIPS Code 51919; Separate estimates are not available

(D) Not shown to avoid disclosure of confidential information; estimates are included in higher-level totals.

Last updated: November 16, 2023-- new statistics for 2022; revised statistics for 2007-2020.

Figure 3-16. Number of Establishments by Industry: Accommodation and Food Services (NAICS 72), 2007-2022.



Data source: Quarterly Census of Employment and Wages (QCEW), Bureau of Labor Statistics, U.S. Department of Labor

Table 3-16: Number of Establishments by Industry: Accommodation and Food Services (NAICS 72), 2007-2022.

Number of Establishments by Industry: Accommodations and Food Service (NAICS 72) for all establishment sizes

Source: Quarterly Census of Employment and Wages (QCEW), Bureau of Economic Analysis, U.S. Department of Commerce

Industry: NAICS 72 Accommodations and Food Service

Owner: Private

Size: All establishment sizes

| FIPS | Name | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------|---------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 24003 | Anne Arundel Co., MD | 1,009 | 1,028 | 1,047 | 1,060 | 1,068 | 1,088 | 1,137 | 1,139 |
| 51013 | Arlington Co., VA | 559 | 564 | 558 | 559 | 582 | 600 | 611 | 603 |
| 24005 | Baltimore Co., MD | 1,556 | 1,573 | 1,577 | 1,553 | 1,571 | 1,615 | 1,628 | 1,648 |
| 11000 | District of Columbia | 1,989 | 2,058 | 2,096 | 2,172 | 2,268 | 2,316 | 2,240 | 2,278 |
| 51059 | Fairfax Co., VA | 1,848 | 1,942 | 1,957 | 1,979 | 2,039 | 2,076 | 2,064 | 2,055 |
| 24021 | Frederick Co., MD | 393 | 408 | 407 | 418 | 433 | 455 | 464 | 456 |
| 24027 | Howard County, MD | 473 | 528 | 506 | 517 | 527 | 535 | 555 | 562 |
| 51107 | Loudoun Co., VA | 458 | 505 | 515 | 537 | 566 | 595 | 603 | 617 |
| 24031 | Montgomery Co., MD | 1,668 | 1,713 | 1,706 | 1,725 | 1,787 | 1,806 | 1,850 | 1,824 |
| 24033 | Prince George's Co., MD | 1,176 | 1,215 | 1,247 | 1,253 | 1,303 | 1,313 | 1,376 | 1,389 |

| | | | | | | | | | |
|-------|----------|--------|--------|--------|--------|--------|--------|--------|--------|
| 24000 | Maryland | 10,820 | 11,025 | 11,079 | 11,150 | 11,389 | 11,623 | 11,863 | 11,777 |
| 51000 | Virginia | 14,776 | 15,404 | 15,324 | 15,357 | 15,713 | 16,029 | 15,939 | 16,001 |

| FIPS | Name | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|--------------|---------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 24003 | Anne Arundel Co., MD | 1,185 | 1,210 | 1,239 | 1,230 | 1,248 | 1,242 | 1,225 | 1,225 |
| 51013 | Arlington Co., VA | 629 | 636 | 635 | 640 | 637 | 640 | 637 | 667 |
| 24005 | Baltimore Co., MD | 1,664 | 1,664 | 1,677 | 1,689 | 1,694 | 1,646 | 1,625 | 1,661 |
| 11000 | District of Columbia | 2,374 | 2,413 | 2,485 | 2,603 | 2,662 | 2,683 | 2,657 | 2,704 |
| 51059 | Fairfax Co., VA | 2,145 | 2,163 | 2,233 | 2,241 | 2,252 | 2,229 | 2,266 | 2,411 |
| 24021 | Frederick Co., MD | 464 | 478 | 480 | 497 | 506 | 503 | 494 | 505 |
| 24027 | Howard County, MD | 591 | 596 | 602 | 601 | 617 | 609 | 605 | 624 |
| 51107 | Loudoun Co., VA | 653 | 670 | 695 | 710 | 728 | 742 | 754 | 815 |
| 24031 | Montgomery Co., MD | 1,852 | 1,881 | 1,921 | 1,925 | 1,966 | 1,939 | 1,880 | 1,930 |
| 24033 | Prince George's Co., MD | 1,387 | 1,411 | 1,426 | 1,443 | 1,496 | 1,500 | 1,454 | 1,465 |

| | | | | | | | | | |
|-------|----------|--------|--------|--------|--------|--------|--------|--------|--------|
| 24000 | Maryland | 11,945 | 12,104 | 12,268 | 12,268 | 12,522 | 12,324 | 12,031 | 12,297 |
| 51000 | Virginia | 16,691 | 16,965 | 17,277 | 17,277 | 17,581 | 17,653 | 18,140 | 19,269 |

Economic Indicators #17-19: Maryland Employment and Wage Estimates Categorized by Major Occupational Group

Definition:

The U.S. Office of Management and Budget (OMB) defines the industry categories, occupational groups, and geographic statistical areas used by federal statistical agencies. Federal statistical agencies report data on the U.S. economy using the North American Industry Classification System (NAICS), which categorizes the economy into 20 industry sectors. Federal statistical agencies also report economic data using the Standard Occupational Classification (SOC) system, which categorizes workers into 23 major occupational groups. Every industry sector employs workers from many occupational groups, and workers in a major occupational group may be employed across many industry sectors.

The economic indicators for this report focus on three major occupational groups likely to have low hourly wages:

- Food Preparation and Serving Related Occupations (SOC code 35-0000)
- Building and Grounds Cleaning and Maintenance Occupations (SOC code 37-0000)
- Personal Care and Service Occupations (SOC code 39-0000)

Food Preparation and Serving Related Occupations. This major occupational group includes occupations such as: Chefs; Supervisors of Food Preparation and Serving Workers; Restaurant, Fast Food, and Short Order Cooks; Institutional and Cafeteria Cooks; Food Preparation Workers; Fast Food Workers; Counter Attendants for Cafeteria, Food Concession, and Coffee Shops; Waiters and Waitresses; Bartenders; Dining Room and Cafeteria Attendants and Bartender Helpers; Dishwashers; and Restaurant and Lounge Hosts and Hostesses.

Building and Grounds Cleaning and Maintenance Occupations. This major occupational group includes occupations such as: First-Line Supervisors of Housekeepers, Janitors and Groundskeepers; Janitors, Maids and Housekeeping Cleaners; Pest Control Workers; Landscaping and Groundskeeping Workers; Pesticide Handlers, Sprayers, and Applicators; and Tree Trimmers and Pruners.

Personal Care and Service Occupations. This major occupational group includes occupations such as: First-Line Supervisors of Gaming Workers and Personal Service Workers; Animal Trainers; Nonfarm Animal Caretakers; Gaming Dealers and Service Workers; Projectionists; Ushers and Ticket Takers; Amusement and Recreation Attendants and Workers; Locker Room, Coatroom, and Dressing Room Attendants; Embalmers; Funeral Attendants; Morticians, Undertakers, and Funeral Directors; Barbers; Hairdressers, Hairstylists, and Cosmetologists; Manicurists and Pedicurists; Shampooers; Skincare Specialists; Porters and Bellhops; Concierges; Tour and Travel Guides; Childcare Workers; Personal Care Aides; Fitness Trainers and Aerobics Instructors; and Residential Advisors.

Indicators' relationship to the local economy and the minimum wage:

The economic indicators for this report focus on three major occupational groups likely to employ workers paid a low hourly wage, of which a significant portion will have higher wages as a result of the County and state minimum wage increases. Increases to the minimum hourly wage rate could reduce total employment in the lower-wage occupational groups if employers reduce the number of jobs in response to higher labor costs. However, employers might also respond to higher labor costs by reducing the number of hours of employment for each job while keeping the number of jobs constant. A reduction of hours at a higher hourly pay rate could result in a net decrease or increase in total annual wages for any individual worker. Employers might also respond to higher hourly labor costs by passing the costs on through higher prices for goods and services.

Sources of data:

Maryland Occupational Wages Estimates for Workforce Regions. Office of Workforce Information & Performance, Maryland Department of Labor, Licensing and Regulation (DLLR).

DLLR data for the Maryland workforce region estimates is generated from the Maryland Occupational Employment Statistics (OES) Program and the Quarterly Census of Employment and Wages (QCEW) Program, both of which are conducted in cooperation with BLS. All DLLR statistics are based on place of work and represent number of jobs, both full-time and part-time. Occupations covered reflect the Standard Occupational Classification (SOC) System.

Current data:

Table 3-17 shows DLLR data by workforce region as of December 2023 for the three major occupational groups for five Maryland counties: Montgomery, Prince George's, Baltimore, Anne Arundel, and Frederick. Table 3-18 shows DLLR data as of December 2023 and Table 3-19 compares the December 2023 data to April 2022 data, the most recent update from DLLR. Of note,

- For **Food Preparation and Serving Related Occupations**, from April 2022 through December 2023, Montgomery County gained 3,630 jobs, a 13.4 percent increase, the highest rate of increase for the five counties shown in this survey. Frederick County experienced the second highest rate of job growth (7.2 percent) while Baltimore County had the smallest rate of growth (3.2 percent). For food preparation and serving workers in Montgomery County, the median hourly wage increased in 2023 by 9.2 percent to \$15.60 per hour, the highest of the five counties and just slightly above the median hourly wage in Prince George's County of \$15.53 per hour.
- For **Buildings and Grounds and Cleaning and Maintenance Occupations**, of the five jurisdictions, Baltimore, Frederick, and Montgomery Counties experienced increases in total jobs from April 2022 to December 2023. Baltimore County had the highest rate of buildings and grounds and cleaning and maintenance job growth (up 3.6 percent) while Montgomery County jobs grew by a more modest rate (1.3 percent). Anne Arundel County suffered the greatest job loss (down 4.7 percent). For buildings and grounds and cleaning and maintenance

workers in Montgomery County, the median hourly wage increased in 2023 by 6.2 percent to \$17.21 per hour, the second lowest median hourly wage of the five counties surveyed. The highest median hourly wage in December 2023 was in Prince George’s County at \$17.81 per hour.

- For the **Personal Care and Service Occupations**, all five counties enjoyed increases in total jobs from April 2022 to December 2023. Montgomery County gained 590 personal care and service jobs, a 5.4 percent increase from April 2022. Average median hourly wages rose in all five counties. In Montgomery County, personal care and service workers earned a median hourly salary increase in December 2023 of \$16.03 per hour, the highest of the five counties surveyed.

Table 3-17. Maryland Employment and Wage Estimates by Major Occupational Group, 2023.

Employment and Wage Estimates by Major Occupational Group December 2023 Estimates)

Source: Maryland Department of Labor, Licensing and Regulation (DLLR)

Occupational Employment Statistics Program

Standard Occupational Classification (SOC) Codes: 35-0000, 37-0000, 39-0000.

| Major Occupational Group | | | | | |
|---|-----------------|-----------------|------------------|--------------|-----------|
| | Montgomery | Prince George's | Baltimore County | Anne Arundel | Frederick |
| Food Preparation and Serving-Related Occupations (SOC 35-0000) | | | | | |
| Estimated employment | 30,740 | 23,790 | 26,560 | 23,640 | 9,360 |
| Entry wage - hourly | \$13.47 | \$13.59 | \$13.07 | \$13.06 | \$13.37 |
| Entry wage - annual | \$28,026 | \$27,272 | \$27,183 | \$27,164 | \$27,814 |
| Mean wage - hourly | \$17.20 | \$17.26 | \$16.13 | \$16.34 | \$17.10 |
| Mean wage - annual | \$35,776 | \$35,911 | \$33,548 | \$33,996 | \$35,578 |
| Median wage - hourly | \$15.60 | \$15.53 | \$14.18 | \$14.19 | \$15.39 |
| Median wage - annual | \$32,455 | \$32,292 | \$29,498 | \$29,518 | \$32,013 |
| Buildings and Grounds Cleaning and Maintenance Occupations (SOC 37-0000) | | | | | |
| Estimated employment | 15,820 | 9,550 | 9,310 | 7,440 | 3,560 |
| Entry wage - hourly | \$14.36 | \$14.40 | \$13.60 | \$13.52 | \$14.56 |
| Entry wage - annual | \$29,874 | \$29,957 | \$28,298 | \$28,119 | \$30,290 |
| Mean wage - hourly | \$18.31 | \$18.95 | \$17.53 | \$17.69 | \$18.94 |
| Mean wage - annual | \$38,078 | \$39,426 | \$36,470 | \$36,793 | \$39,400 |
| Median wage - hourly | \$17.21 | \$17.81 | \$16.73 | \$17.24 | \$17.61 |
| Median wage - annual | \$35,799 | \$37,044 | \$34,805 | \$35,868 | \$36,620 |
| Personal Care and Service Occupations (SOC 39-0000) | | | | | |
| Estimated employment | 11,490 | 6,440 | 9,040 | 5,920 | 2,740 |
| Entry wage - hourly | \$14.10 | \$13.28 | \$13.17 | \$13.08 | \$13.27 |
| Entry wage - annual | \$29,332 | \$27,613 | \$27,297 | \$27,200 | \$27,611 |
| Mean wage - hourly | \$18.41 | \$17.73 | \$17.96 | \$18.30 | \$18.22 |
| Mean wage - annual | \$38,287 | \$36,884 | \$37,358 | \$38,060 | \$37,908 |
| Median wage - hourly | \$16.03 | \$15.55 | \$15.26 | \$14.91 | \$15.47 |
| Median wage - annual | \$33,337 | \$32,353 | \$31,748 | \$31,017 | \$32,175 |

Table 3-18. Maryland Employment and Wage Estimates by Major Occupational Group, 2022.

Employment and Wage Estimates by Major Occupational Group (April 2022 Estimates)

Source: Maryland Department of Labor, Licensing and Regulation (DLLR)

Occupational Employment Statistics Program

Standard Occupational Classification (SOC) Codes: 35-0000, 37-0000, 39-0000.

| Major Occupational Group | Workforce Region | | | | |
|---|------------------|-----------------|------------------|--------------|-----------|
| | Montgomery | Prince George's | Baltimore County | Anne Arundel | Frederick |
| Food Preparation and Serving-Related Occupations (SOC 35-0000) | | | | | |
| Estimated employment | 27,110 | 22,320 | 25,730 | 22,730 | 8,730 |
| Entry wage - hourly | \$12.59 | \$12.60 | \$11.85 | \$11.84 | \$12.38 |
| Entry wage - annual | \$26,180 | \$26,204 | \$24,640 | \$24,620 | \$25,761 |
| Mean wage - hourly | \$16.14 | \$15.96 | \$14.91 | \$14.99 | \$15.83 |
| Mean wage - annual | \$33,563 | \$33,200 | \$31,005 | \$31,169 | \$32,932 |
| Median wage - hourly | \$14.29 | \$14.29 | \$13.64 | \$13.64 | \$14.20 |
| Median wage - annual | \$29,721 | \$29,725 | \$28,378 | \$28,378 | \$29,537 |
| Buildings and Grounds Cleaning and Maintenance Occupations (SOC 37-0000) | | | | | |
| Estimated employment | 15,620 | 9,890 | 8,990 | 7,810 | 3,450 |
| Entry wage - hourly | \$13.56 | \$13.72 | \$12.83 | \$12.71 | \$13.60 |
| Entry wage - annual | \$28,204 | \$28,541 | \$26,687 | \$26,432 | \$28,298 |
| Mean wage - hourly | \$17.63 | \$18.19 | \$17.06 | \$17.08 | \$18.38 |
| Mean wage - annual | \$36,671 | \$37,840 | \$35,484 | \$35,517 | \$38,222 |
| Median wage - hourly | \$16.21 | \$17.22 | \$14.77 | \$14.82 | \$17.54 |
| Median wage - annual | \$33,725 | \$35,813 | \$30,715 | \$30,828 | \$36,476 |
| Personal Care and Service Occupations (SOC 39-0000) | | | | | |
| Estimated employment | 10,900 | 5,520 | 8,900 | 5,600 | 2,670 |
| Entry wage - hourly | \$12.95 | \$12.56 | \$12.17 | \$11.76 | \$12.54 |
| Entry wage - annual | \$26,935 | \$26,115 | \$25,319 | \$24,461 | \$26,093 |
| Mean wage - hourly | \$17.69 | \$17.35 | \$16.77 | \$16.36 | \$17.14 |
| Mean wage - annual | \$36,801 | \$36,098 | \$34,879 | \$34,024 | \$35,661 |
| Median wage - hourly | \$14.68 | \$14.45 | \$14.23 | \$13.93 | \$14.85 |
| Median wage - annual | \$30,539 | \$30,046 | \$29,608 | \$28,971 | \$30,888 |

Table 3-19. Maryland Employment and Wage Estimates by Major Occupational Group, Change from April 2022 to December 2023.

**Employment and Wage Estimates by Major Occupational Group
(Change from from April 2022 to December 2023)**

Source: Maryland Department of Labor, Licensing and Regulation (DLLR)

Occupational Employment Statistics Program

Standard Occupational Classification (SOC) Codes: 35-0000, 37-0000, 39-0000.

| Major Occupational Group | Workforce Region | | | | |
|---|------------------|-----------------|------------------|--------------|-----------|
| | Montgomery | Prince George's | Baltimore County | Anne Arundel | Frederick |
| Food Preparation and Serving-Related Occupations (SOC 35-0000) | | | | | |
| Estimated employment | 3,630 | 1,470 | 830 | 910 | 630 |
| Entry wage - hourly | \$0.88 | \$0.99 | \$1.22 | \$1.22 | \$0.99 |
| Entry wage - annual | \$1,846 | \$1,068 | \$2,543 | \$2,544 | \$2,053 |
| Mean wage - hourly | \$1.06 | \$1.30 | \$1.22 | \$1.35 | \$1.27 |
| Mean wage - annual | \$2,213 | \$2,711 | \$2,543 | \$2,827 | \$2,646 |
| Median wage - hourly | \$1.31 | \$1.24 | \$0.54 | \$0.55 | \$1.19 |
| Median wage - annual | \$2,734 | \$2,567 | \$1,120 | \$1,140 | \$2,476 |
| Buildings and Grounds Cleaning and Maintenance Occupations (SOC 37-0000) | | | | | |
| Estimated employment | 200 | -340 | 320 | -370 | 110 |
| Entry wage - hourly | \$0.80 | \$0.68 | \$0.77 | \$0.81 | \$0.96 |
| Entry wage - annual | \$1,670 | \$1,416 | \$1,611 | \$1,687 | \$1,992 |
| Mean wage - hourly | \$0.68 | \$0.76 | \$0.47 | \$0.61 | \$0.56 |
| Mean wage - annual | \$1,407 | \$1,586 | \$986 | \$1,276 | \$1,178 |
| Median wage - hourly | \$1.00 | \$0.59 | \$1.96 | \$2.42 | \$0.07 |
| Median wage - annual | \$2,074 | \$1,231 | \$4,090 | \$5,040 | \$144 |
| Personal Care and Service Occupations (SOC 39-0000) | | | | | |
| Estimated employment | 590 | 920 | 140 | 320 | 70 |
| Entry wage - hourly | \$1.15 | \$0.72 | \$1.00 | \$1.32 | \$0.73 |
| Entry wage - annual | \$2,397 | \$1,498 | \$1,978 | \$2,739 | \$1,518 |
| Mean wage - hourly | \$0.72 | \$0.38 | \$1.19 | \$1.94 | \$1.08 |
| Mean wage - annual | \$1,486 | \$786 | \$2,479 | \$4,036 | \$2,247 |
| Median wage - hourly | \$1.35 | \$1.10 | \$1.03 | \$0.98 | \$0.62 |
| Median wage - annual | \$2,798 | \$2,307 | \$2,140 | \$2,046 | \$1,287 |

Appendix A. Acronyms

| | |
|--------|---|
| ANSI | American National Standards Institute; defines uniform codes for geographic entities. |
| BEA | Bureau of Economic Analysis, within the U.S. Department of Commerce. |
| BLS | Bureau of Labor Statistics, within the U.S. Department of Labor. |
| CBSA | Core Based Statistical Area; defined by U.S. OMB. |
| CES | Current Employment Statistics survey; establishment-based data published by BLS. |
| CPS | Current Population Survey; residence-based data collected by the Census Bureau. |
| CSA | Combined Statistical Area; a subdivision of core based statistical areas defined by U.S. OMB. |
| DLLR | Maryland Department of Labor, Licensing and Regulation. |
| ESS | Employment Standards Service; a unit within DLLR. |
| FIPS | Federal Information Processing Series; includes commonly used geographic codes. |
| GDP | Gross Domestic Product. |
| GNIS | Geographic Names Information System. |
| INCITS | InterNational Committee for Information Technology Standards. |
| ISO | International Organization for Standardization. |
| LAUS | Local Area Unemployment Statistics; residence-based data published by BLS. |
| MSA | Metropolitan Statistical areas; distinct from Metropolitan Divisions; both defined by U.S. OMB. |
| NAICS | North American Industry Classification System. |
| NBER | National Bureau of Economic Research; a private, nonprofit, nonpartisan organization. |
| OES | Occupational Employment Statistics. |
| OMB | U.S. Office of Management and Budget; OMB manages the 13 federal statistical agencies. |
| PCPI | Per Capita Personal Income. |
| PPI | Producer Price Index; a measure of inflation. |
| QCEW | Quarterly Census of Employment and Wages program; place of work data published by BLS. |
| SAIPE | Small Area Income and Poverty Estimates; U.S. Census Bureau. |
| SOC | Standard Occupational Classifications; used by federal statistical agencies. |
| UI | Unemployment Insurance programs; used for QCEW data. |

Appendix B. Glossary of Economic Terms

Bureau of Labor Statistics (BLS): BLS is housed with the U.S. Department of Labor. BLS publishes three different establishment-based employment measures:

- Quarterly Census of Employment and Wages (QCEW) - a count of unemployment insurance (UI) administrative records submitted by 10 million establishments.
- Business Employment Dynamics (BED) - a count of longitudinally linked UI administrative records from 8 million private-sector employers.
- Current Employment Statistics (CES) - a sample survey of 651,000 establishments.

These measures use quarterly UI employment reports to produce data. Major exclusions from UI coverage include: self-employed workers; most agricultural workers on small farms; all members of the Armed Forces; elected officials in most states; most employees of railroads; some domestic workers; most student workers at schools; and employees of certain small nonprofit organizations.

Census: A census collects information about every member of the population. In contrast, a survey collects data from a sample of the population.

Current Employment Statistics (CES): CES is a BLS program that produces detailed industry estimates of nonfarm employment, hours, and earnings of workers on payrolls. CES data are collected through monthly surveys of business establishments and government agencies at about 651,000 individual worksites. CES data are based on place of work (establishment-based) and categorized using NAICS industry codes. CES National Estimates produces data for the nation; CES State and Metro Area produces estimates for all 50 States, the District of Columbia, Puerto Rico, the Virgin Islands, and about 450 metropolitan areas and divisions.⁴³ *CES data are not currently available at the County level.*

Current Population Survey (CPS): The CPS is a monthly survey of about 60,000 households (nationally) conducted by the Census Bureau for the Bureau of Labor Statistics. CPS data are based on place of residence. The CPS provides comprehensive data on the labor force, employment, unemployment, persons not in the labor force, hours of work, earnings, and other demographic and labor force characteristics.

Economic Census: Every five years, the U.S. Census Bureau conducts an official count that serves as the foundation for the measurement of U.S. businesses and their economic impact. Businesses of all sizes covering most industries and all geographic areas of the United States receive surveys tailored to their primary business activity. In addition to the quinquennial economic census, the Census Bureau conducts numerous economic surveys.

Economic Output (gross domestic product - GDP): Total value of goods and services produced by a county economy, also known as GDP. BEA is developing County-level GDP statistics starting in December 2019.⁴⁴

Enterprise: An enterprise (or "company") is a business organization consisting of one or more domestic establishments under common ownership or control. For single-establishment firms, the enterprise and the establishment are the same. A multi-establishment company forms one enterprise.

Establishment: An establishment is a single physical location at which business is conducted or operations are performed. An enterprise (company) may consist of one or more establishments.

Household: "Household" data (as from the Current Population Survey) pertain to individuals where they reside. In contrast, "establishment" data pertain to jobs (persons on payrolls) where those jobs are located.

Industry: see NAICS.

Jobs: Jobs may be full-time or part-time, temporary or permanent. A count of jobs is not necessarily a count of employed people.

Local Area Unemployment Statistics (LAUS) program: LAUS is a federal-state cooperative effort in which monthly estimates of total employment and unemployment are prepared for states, counties, metropolitan divisions, and metropolitan statistical areas. LAUS data are published by BLS. Concepts and definitions underlying LAUS data come from the Current Population Survey (CPS), which is the household survey that generates the national unemployment rate. To produce the LAUS, BLS models combine current and historical data from the CPS, the Current Employment Statistics (CES) survey, and state unemployment insurance (UI) systems.⁴⁵

National Bureau of Economic Research (NBER): NBER is a private, non-profit, non-partisan organization that conducts economic research and disseminates research findings among academics, public policy makers, and business professionals. Montgomery County Bill No. 28-17 (Sec. 27-70A), *Concerning: Human Rights and Civil Liberties – County Minimum Wage – Amount – Annual Adjustment*, provides that minimum wage increases are contingent on certain economic conditions that include a determination by NBER as to whether the U.S. economy is in recession.

Nominal value: The value of anything expressed simply as the dollars of the day. Money can lose value over time as a result of inflation causing nominal figures to be misleading when comparing dollars in different periods. When nominal dollars have been adjusted for inflation, they are called real (or constant) dollars.

North American Industry Classification System (NAICS): NAICS is the system used by federal statistical agencies to classify business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. NAICS is organized hierarchically. The 2017 NAICS divides the economy into 20 sectors (two-digit level), 99 subsectors (three-digit level), 311 industry groups (four-digit level), and 709 industries (five-digit level).⁴⁶

Peak: The highest annual value of an economic indicator (the lowest for the unemployment rate) between two selected points in time.

Poverty: Federal poverty thresholds (FPTs) are used to calculate all federal poverty population statistics. FPTs vary by family size, number of related children, and age of householder. Federal poverty thresholds do not vary geographically. The thresholds are updated by the Census Bureau annually to reflect changes in the cost of living. Federal poverty guidelines (FPGs) are a simplified version of FPTs used to determine household eligibility for certain public benefits. According to the U.S. Department of Health and Human Services, “The poverty guidelines are sometimes loosely referred to as the “federal poverty level” (FPL), but that phrase is ambiguous and should be avoided, especially in situations (e.g., legislative or administrative) where precision is important.”⁴⁷

Quarterly Census of Employment and Wages (QCEW) program: The Bureau of Labor Statistics (within the U.S. Dept. of Labor) derives QCEW data from quarterly tax reports submitted to state workforce agencies by employers who are subject to state and federal unemployment insurance laws. Each quarter, state agencies send the information to BLS’ national office in Washington, DC. QCEW statistics are categorized using the NAICS codes. The QCEW program provides the most complete set of monthly employment and quarterly wage data by 6-digit industry at the national, state, combined metropolitan statistical area and County levels. These data have broad economic significance for the evaluation of labor market trends and major industry developments, for time-series analyses, and for interindustry comparisons.⁴⁸ QCEW statistics are not designed as a time series. Establishments can move in or out of a county or industry for a number of reasons that reflect economic events or administrative changes.⁴⁹

Real value: Nominal values (such as dollars) that have been adjusted for inflation. Money can lose value over time as a result of inflation causing nominal figures to be misleading when comparing dollars in different periods. Real dollars may also be referred to as constant dollars.

Recession: An economic downturn. The National Bureau of Economic Research (NBER), a private nonprofit organization, is one entity that defines the start and end of U.S. economic recessions.

Standard Occupational Classification (SOC) system: The SOC system is a federal statistical standard used by federal agencies to classify workers into occupational categories for the purpose of collecting, calculating, or disseminating data. All workers are classified into one of 867 detailed occupations according to their occupational definition. To facilitate classification, detailed occupations are combined to form hundreds of broad occupations, about one hundred minor groups, and 23 major groups.⁵⁰ The SOC system helps ensure that occupational data produced across the federal statistical system are comparable and can be used together in analysis.

Survey: A survey is data collection from a sample of the population. In contrast, a census collects information about every member of the population.

Survey of Business Owners and Self-Employed Persons (SBO): The Census Bureau conducts the SBO every five years as part of the Economic Census. The Annual Survey of Entrepreneurs (ASE) is a supplement to the SBO. The SBO samples both employer and non-employer firms, while the ASE samples only employer firms. ASE estimates are published in less detail than the SBO, with ASE

statistics available only at the U.S., state, and top fifty metro areas level of geography, and at the 2-digit industry sector.⁵¹

Trough: The lowest annual value of an economic indicator (the highest for the unemployment rate) between two selected points in time.

Unemployment Rate: The proportion of the civilian labor force that is unemployed in an economy. Persons are classified as unemployed if they do not have a job, have actively looked for work in the prior four weeks and are currently available for work. The monthly Current Population Survey of households is the source of federal data on the unemployment rate.

Appendix C. Glossary of Geographic Units and Terms

Combined Statistical Area: The U.S. OMB may group adjacent Metropolitan and Micropolitan Statistical Areas into complementary Combined Statistical Areas.⁵²

Core Based Statistical Areas (CBSAs)⁵³: The U.S. Office of Management and Budget (OMB) delineates Core Based Statistical Areas (CBSAs) to provide consistency for federal statistics across geographic areas. A CBSA is a geographic entity associated with at least one urban area core and adjacent territory with a high degree of social and economic integration.⁵⁴ Subdivisions of CBSAs include Metropolitan Statistical Areas, Micropolitan Statistical Areas, and Metropolitan Divisions.⁵⁵

Federal Information Processing Series (FIPS) codes: FIPS codes were developed by the federal government to help ensure computer security and interoperability where industry standards did not exist. FIPS geographic codes provide unique identifiers for geographic areas. For example, the FIPS code for Fairfax County is 51059; BEA modifies the FIPS Codes to combine Fairfax County (FIPS 51059), Fairfax City (FIPS 51600) and Falls Church (FIPS 51610) into a single FIPS Code 51919. In this example, the FIPS codes clarify that similarly named geographic entities may be distinct: data for FIPS 51059 is not necessarily identical to FIPS 51919. The American National Standards Institute (ANSI) continues to publish FIPS codes, but the federal government is in the process of replacing FIPS geographic codes with codes defined by the International Organization for Standardization (ISO) and the International Committee for Information Technology Standards (INCITS).

Metropolitan Division: A grouping of counties. U.S. OMB may subdivide a Metropolitan Statistical Area into smaller groupings of counties called Metropolitan Divisions. *Metropolitan Divisions can be directly compared with each other but not with Metropolitan Statistical Areas.*⁵⁶ Examples include:

- **Silver Spring-Frederick-Rockville, MD Metropolitan Division** (FIPS Code 43524), comprised of: Montgomery County, MD and Frederick County, MD.
- **Washington-Arlington-Alexandria, DC-VA-MD-WV Metropolitan Division** (FIPS Code 47894), comprised of the District of Columbia and 20 surrounding jurisdictions.
- **Baltimore-Columbia-Towson, MD Metropolitan Division** (FIPS Code 12580), comprised of Baltimore City and six surrounding counties.

Metropolitan Statistical Area: A grouping of entities, including counties and other types of jurisdictions, with at least one urbanized area with a population of at least 50,000, plus adjacent territory that has a high degree of social and economic integration and a core with commuting ties. For example, the **Washington-Arlington-Alexandria, DC-VA-MD-WV Metropolitan Statistical Area** (FIPS Code 47900) comprised of: D.C., Montgomery County, and 23 additional counties.

Endnotes

- ¹ For a more detailed discussion of the different ways that federal statistical agencies measure county employment and wages, see: *What is the difference between BEA employment and wages and BLS and Census employment and wages?* (U.S. Bureau of Economic Analysis, FAQ, 2006); retrieved from www.bea.gov/help/faq/104.
- ² Occupational Employment Statistics: May 2017 Occupational Employment and Wage Estimates for the Silver Spring-Frederick-Rockville, MD Metropolitan Division.
- ³ <https://www.dllr.state.md.us/labor/wages/minimumwagelaw.pdf>
- ⁴ https://www.montgomerycountymd.gov/humanrights/Resources/Files/Wage-NOTICE-Flyer_2021.pdf
- ⁵ For a complete list of all state and local minimum wage rates higher than the federal minimum wage, see the Economic Policy Institute's Minimum Wage Tracker; www.epi.org/minimum-wage-tracker/#/min_wage.
- ⁶ The federal minimum wage provisions are contained in the Fair Labor Standards Act (FLSA). See U.S. Department of Labor website: www.dol.gov/whd/minimumwage.htm
- ⁷ Code of the District of Columbia Chapter 10 Section 32-1003
- ⁸ Labor and Employment Article, Title 3, Subtitle 4, Annotated Code of Maryland; see website for DLLR, www.dllr.state.md.us/labor/wages/wagehrfacts.shtml
- ⁹ County Council Bill No. 28-17, *Concerning: Human Rights and Civil Liberties – County Minimum Wage – Amount – Annual Adjustment*, enacted Nov. 7, 2017, effective July 1, 2018; https://apps.montgomerycountymd.gov/ccclims/DownloadFilePage?FileName=1454_1_612_Bill_28-17_Signed_20171115.pdf.
- ¹⁰ Montgomery County Code Sec. 27-70A.
- ¹¹ *Economic Indicators for Montgomery County and Surrounding Jurisdictions*, OLO Report 2023-2 (January 24, 2022) https://www.montgomerycountymd.gov/OLO/Resources/Files/2023_reports/OLOReport2023-2.pdf.
- ¹² For a more detailed discussion of the different ways that federal statistical agencies measure county employment and wages, see: *What is the difference between BEA employment and wages and BLS and Census employment and wages?* (U.S. Bureau of Economic Analysis, FAQ, 2006); retrieved from www.bea.gov/help/faq/104.
- ¹³ Bureau of Economic Analysis Data Availability retrieved from <https://www.bls.gov/cew/about-data/data-availability.htm>.
- ¹⁴ Occupational Employment Statistics: Occupational Employment and Wage Estimates for the Silver Spring-Frederick-Rockville, MD Metropolitan Division, https://www.bls.gov/regions/mid-atlantic/md_bethesda_md.htm.
- ¹⁵ R. Florida, *The Power of Density* (The Atlantic, Sept. 8, 2010); retrieved from www.theatlantic.com/business/archive/2010/09/the-power-of-density/62569/.
- ¹⁶ Interactive Data Tables: Regional Economic Accounts, Bureau of Economic Analysis, U.S. Dept. of Commerce; <https://apps.bea.gov/iTable/iTable.cfm?reqid=70&step=1&isuri=1>.
- ¹⁷ Small Area Income and Poverty Estimates (SAIPE) data sets, Census Bureau, U.S. Department of Commerce; retrieved from www.census.gov/programs-surveys/saipe.html.
- ¹⁸ Census Bureau annual tables of federal poverty thresholds by size of family and number of children are available from www.census.gov/data/tables/time-series/demo/income-poverty/historical-poverty-thresholds.html.
- ¹⁹ *What Does the Minimum Wage Do?* D. Belman and P.J. Wolfson, (W.E. Upjohn Institute for Employment Research, Upjohn Institute Press, 2014), Introduction: p. 2 https://research.upjohn.org/cgi/viewcontent.cgi?article=1245&context=up_press.
- ²⁰ Poverty estimates in this report are from the Small Area Income and Poverty Estimates (SAIPE) derived from ongoing household surveys by the Census Bureau. In selecting a data source, the Census Bureau recommends using: the SAIPE for county estimates, the American Community Survey (ACS) for state estimates, and the Annual Social and Economic Supplement to the Current Population Survey (CPS ASEC) for national estimates. For a longer discussion, see: U.S. Census Bureau, Guidance, "Poverty: Which Data Source to Use?" retrieved from www.census.gov/topics/income-poverty/guidance/data-sources.html.
- ²¹ USDA Food and Nutrition Service; retrieved from <https://www.fns.usda.gov/snap/eligibility>.
- ²² *What Does the Minimum Wage Do?* D. Belman and P.J. Wolfson, (W.E. Upjohn Institute for Employment Research, Upjohn Institute Press, 2014), Introduction: p. 2 and p. 8.
- ²³ Small Area Income and Poverty Estimates (SAIPE), Census Bureau, U.S. Department of Commerce retrieved from www.census.gov/data/datasets/time-series/demo/saipe/model-tables.html.

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- ²⁴USDA, “Regulatory Reform at a Glance, Final Rule: Employment for Work-Capable Adults,” December 2019, <https://www.usda.gov/sites/default/files/documents/abawd-factsheet.pdf> .
- ²⁵ Bureau of Economic Analysis (U.S. Dept. of Commerce): *What is the difference between BEA employment and wages and BLS and Census employment and wages?*; retrieved from www.bea.gov/help/faq/104.
- ²⁶ Ibid, p. II-8.
- ²⁷ Bureau of Labor Statistics, U.S. Dept of Labor, Economic News Release: State Employment and Unemployment Technical Note (version last modified November 19, 2021); retrieved from www.bls.gov/news.release/laus.tn.htm.
- ²⁸ The Census Bureau (U.S. Dept. of Commerce) collects unemployment data through the monthly Current Population Survey (CPS). For a discussion of measuring employment versus unemployment, see: J. Shiskin, “Employment and unemployment: The doughnut or the hole?” (*Monthly Labor Review*, 1976); retrieved from www.bls.gov/opub/mlr/1976/article/employment_and_unemployment_the_doughnut.htm.
- ²⁹ *Economy Stats: Seven Causes of Unemployment*, K. Amadeo (The Balance, Oct. 31, 2018); retrieved from www.thebalance.com/causes-of-unemployment-7-main-reasons-3305596.
- ³⁰ *The Curse of Econ 101: Economism and the Minimum Wage*, J. Kwak (*The Atlantic*, Jan. 14, 2017); retrieved from www.theatlantic.com/business/archive/2017/01/economism-and-the-minimum-wage/513155/.
- ³¹ Bureau of Economic Analysis (U.S. Dept. of Commerce): Regional Definitions, <https://www.bea.gov/taxonomy/term/691>.
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