

# Economic Indicators for Montgomery County and Surrounding Jurisdictions

Bill 28-17, enacted in November 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"> <li>• Washington</li> </ul>	<ul style="list-style-type: none"> <li>• Anne Arundel County</li> <li>• Baltimore County</li> <li>• Frederick County</li> <li>• Howard County</li> <li>• Prince George’s County</li> </ul>	<ul style="list-style-type: none"> <li>• Arlington County</li> <li>• Fairfax County</li> <li>• Loudoun County</li> </ul>

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 is OLO’s second annual report. In brief, the current data show the County’s economic indicators generally moved in tandem with those of the surrounding jurisdictions and did not diverge from the overall pattern for the region.

Compared to last year, most of the ten County indicators in the categories of Community Economic Well-Being and Public Assistance and Household and Workplace Economic Activity show positive trends. For example, County median household income and County employment rose while the poverty rate for those under 18 and the resident unemployment rate fell.

The seven indicators in the category of Low-Wage Industry Sectors and Occupational Groups paint a mixed picture. Department of Labor and Licensing Regulation (DLLR) data for Montgomery County show a loss of 3,890 Food Preparation jobs (down 12.2 percent), a gain of 810 Building and Grounds and Cleaning and Maintenance jobs (up 4.5 percent) and a gain of 670 Personal Care and Service jobs (up 4.3 percent). DLLR data for the other four regions show a mix of gains and losses in the Food Preparation and Building job groups. All four regions saw gains in Personal Care jobs. In OLO’s view, these trends merit monitoring but they do not signal the need for an in-depth examination of underlying causes.

Finally, the report highlights one policy change and two technical changes that occurred in 2019. They include:

- An updated table of statutory minimum wage rates per hour, by jurisdiction (Table 2-2 on page 4) that reflects the new, higher State minimum wage rates enacted in March 2019.
- New U.S. Department of Agriculture rules for the Supplemental Nutrition Assistance Program (SNAP) that take effect in April 2020 that may reduce the usefulness of using SNAP beneficiaries as a proxy for low-wage workers.
- A decision by BLS to no longer report Occupational Employment Statistics (OES) survey data for the Silver Spring-Frederick-Rockville Maryland Division of the Washington DC Metropolitan Statistical Area (MSA).

OLO will examine the effects of these changes, including whether to propose new indicators, in next year’s report.

## OLO ECONOMIC INDICATORS for 2020

#	Indicator (Change from prior year) <sup>1</sup>	Data Source	Significance/Rationale	Most recent County datapoint	Change from last year
<b>INDICATORS OF COMMUNITY ECONOMIC WELL-BEING AND PUBLIC ASSISTANCE</b>					
1	Total County Population	BEA, Commerce	Provides a basis for benchmarking.	1,052,567	UP
2	Total Population as a Percentage of State Population			17.4%	FLAT
3	Median Household Income	SAIPE, Census	Provides measure of economic well-being.	\$107,758	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.	8.4%	DN
5	Percentage of Residents Receiving Supplemental Nutrition Assistance Program (SNAP) benefits	SAIPE, Census and BEA, Commerce	SNAP eligibility is household income <130% of the federal poverty threshold. The resident % measures need for public assistance, although changes in eligibility rules may lessen this connection.	5.9%	NA
<b>INDICATORS OF HOUSEHOLD AND WORKPLACE ECONOMIC ACTIVITY</b>					
6	Resident Civilian Labor Force (Employed plus unemployed)	LAUS, BLS	Measure of a community's potential working adult population.	554,989	UP
7	Resident Unemployment Rate	LAUS, BLS	Percentage of adults age 16 and over looking for work measures local economic health and opportunity.	3.2%	DN
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.	728,259	UP
9	Wage and Salary Employment (Number of full-time and part-time jobs, by workplace)	BEA, Commerce	Measures changes in economic opportunity.	517,537	UP
10	Number of Private Establishments	QCEW, BLS	Measures changes in economic activity.	32,680	FLAT
<b>INDICATORS FOR LOW-WAGE INDUSTRY SECTORS AND OCCUPATIONAL GROUPS</b>					
11	Retail Trade: Workplace Employment	BEA	Measures economic activity for an industry sector with a high percentage of minimum wage workers.	52,716	DN
12	Retail Trade: Employee Compensation	BEA		\$1.970B	UP
13	Retail Trade: Number of Establishments	QCEW, BLS		2,584	FLAT
14	Accomm. & Food Services: Workplace Employment	BEA	Measures economic activity for an industry sector with a high percentage of minimum wage workers.	40,323	UP
15	Accomm. & Food Services: Employee Compensation	BEA		\$1.22B	UP
16	Accomm. & Food Services: Number of Establishments	QCEW, BLS		1,925	FLAT
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)	NA

<sup>1</sup> Change compares the current data to to the prior year data and notes whether is higher (UP), lower (DN) or nearly the same (FLAT).

# Office of Legislative Oversight Report 2020-2

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# Chapter 1. Authority, Scope, Methodology, and Acknowledgements

## A. 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.<sup>1</sup>
- Council Resolution 19-173, *Fiscal Year 2020 Work Program of the Office of Legislative Oversight*, adopted July 23, 2019.

## B. 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.<sup>2,3</sup> 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.<sup>4</sup> This report updates those indicators as initially published in January 2019. 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.<sup>5</sup>

- 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).<sup>6</sup>
- 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.<sup>7</sup>

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.

### **C. Acknowledgements**

This project was conducted by OLO staff members Sue Richards, Senior Legislative Analyst, and Carl Scruggs, Research Associate, with assistance from: Victoria (Tori) H. Hall, Legislative Analyst, and Kelli Robinson, OLO Administrative Specialist.

## Chapter 2. Minimum Wage Rates in Montgomery County and Other Jurisdictions

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

### A. 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.<sup>8</sup> 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.

### B. State of Maryland Minimum Wage

States may set labor standards that are more protective of employees than federal statutes. Under this authority, most states and the District of Columbia have minimum wage rates above the federal minimum rate of \$7.25 per hour.<sup>9,10</sup>

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, 2020, the State rate became \$11.00 per hour. By January 1, 2025, the rate will increase to \$15.00 per hour for employers with 15 or more employees.<sup>11</sup>

### C. 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 increases 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.<sup>12</sup>

Date	Large Employers (51+)	Mid-Sized Employers (11-50)	Small Employers (≤10)
7/1/2018	\$12.25	\$12.00	\$12.00
7/1/2019	\$13.00	\$12.50	\$12.50
7/1/2020	\$14.00	\$13.25	\$13.00
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 + Inflation + Adjustment	\$15.00 + Inflation + Adjustment

In 2018, Montgomery County enacted Bill 34-18 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.

<b>Table 2-2. Statutory Minimum Wage Rate Per Hour, by Jurisdiction<sup>13</sup></b>						
	<b>7/1/2018</b>	<b>7/1/2019</b>	<b>7/1/2020</b>	<b>7/1/2021</b>	<b>7/1/2022</b>	<b>7/1/2023</b>
Federal Government <sup>14</sup>	\$7.25	\$7.25	\$7.25	\$7.25	\$7.25	\$7.25
District of Columbia <sup>15</sup>	\$13.25	\$14.00	\$15.00	\$15 + inflation	prior year + inflation	prior year + inflation
State of Virginia (and counties) *	\$7.25	\$7.25	\$7.25	\$7.25	\$7.25	\$7.25
<b>Montgomery County, MD:</b>	<b>7/1/2018</b>	<b>7/1/2019</b>	<b>7/1/2020</b>	<b>7/1/2021</b>	<b>7/1/2022</b>	<b>7/1/2023</b>
Large Employers (51+ employees)	\$12.25	\$13.00	\$14.00	\$15.00	\$15 + inflation	prior year + inflation
Mid-sized Employers (11-50 employees)	\$12.00	\$12.50	\$13.25	\$14.00	\$14.50	\$15.00
Small Employers (≤10)	\$12.00	\$12.50	\$13.00	\$13.50	\$14.00	\$14.50
	<b>7/1/2018</b>	<b>7/1/2019</b>	<b>7/1/2020</b>	<b>1/1/2021</b>	<b>1/1/2022</b>	<b>1/1/2023</b>
Prince George's County, MD**	\$11.50	\$11.50	\$11.50	New State rates apply	New State rates apply	New State rates apply
<b>State of Maryland:<sup>16*</sup></b>	<b>7/1/2018</b>	<b>7/1/2019</b>	<b>1/1/2020</b>	<b>1/1/2021</b>	<b>1/1/2022</b>	<b>1/1/2023</b>
• Large Employers (15+ employees)	\$10.10	\$10.10	\$11.00	\$11.75	\$12.50	\$13.25
• Small Employers (<15 employees)	\$10.10	\$10.10	\$11.00	\$11.60	\$12.20	\$12.80
Anne Arundel County, MD**	\$10.10	\$10.10	New State rates apply	New State rates apply	New State rates apply	New State rates apply
Baltimore County, MD**	\$10.10	\$10.10	New State rates apply	New State rates apply	New State rates apply	New State rates apply
Carroll County, MD**	\$10.10	\$10.10	New State rates apply	New State rates apply	New State rates apply	New State rates apply
Frederick County, MD**	\$10.10	\$10.10	New State rates apply	New State rates apply	New State rates apply	New State rates apply
Howard County, MD**	\$10.10	\$10.10	New State rates apply	New State rates apply	New State rates apply	New State rates apply
* Virginia uses the federal minimum wage. **County uses or will use 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.<sup>17,18</sup> To fulfill that requirement, in 2019 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 2019.<sup>19</sup> 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 agencies<sup>20</sup>:

- 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).<sup>21</sup>
- 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 wages<sup>22</sup>:

- 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 Department of Labor, Licensing and Regulation (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.<sup>23</sup>

Figure 3-1 depicts data for the total population (all ages) of Montgomery County and surrounding jurisdictions in the region for the 2003-2018 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 2003-2018 period.

As of 2018, Montgomery County had a total population of approximately 1.1 million. It has the largest population among Maryland counties and it accounts for 17.4 percent of Maryland's total population. The County's population grew steadily over the 2003-2018 period.

### *Current data and trends:*

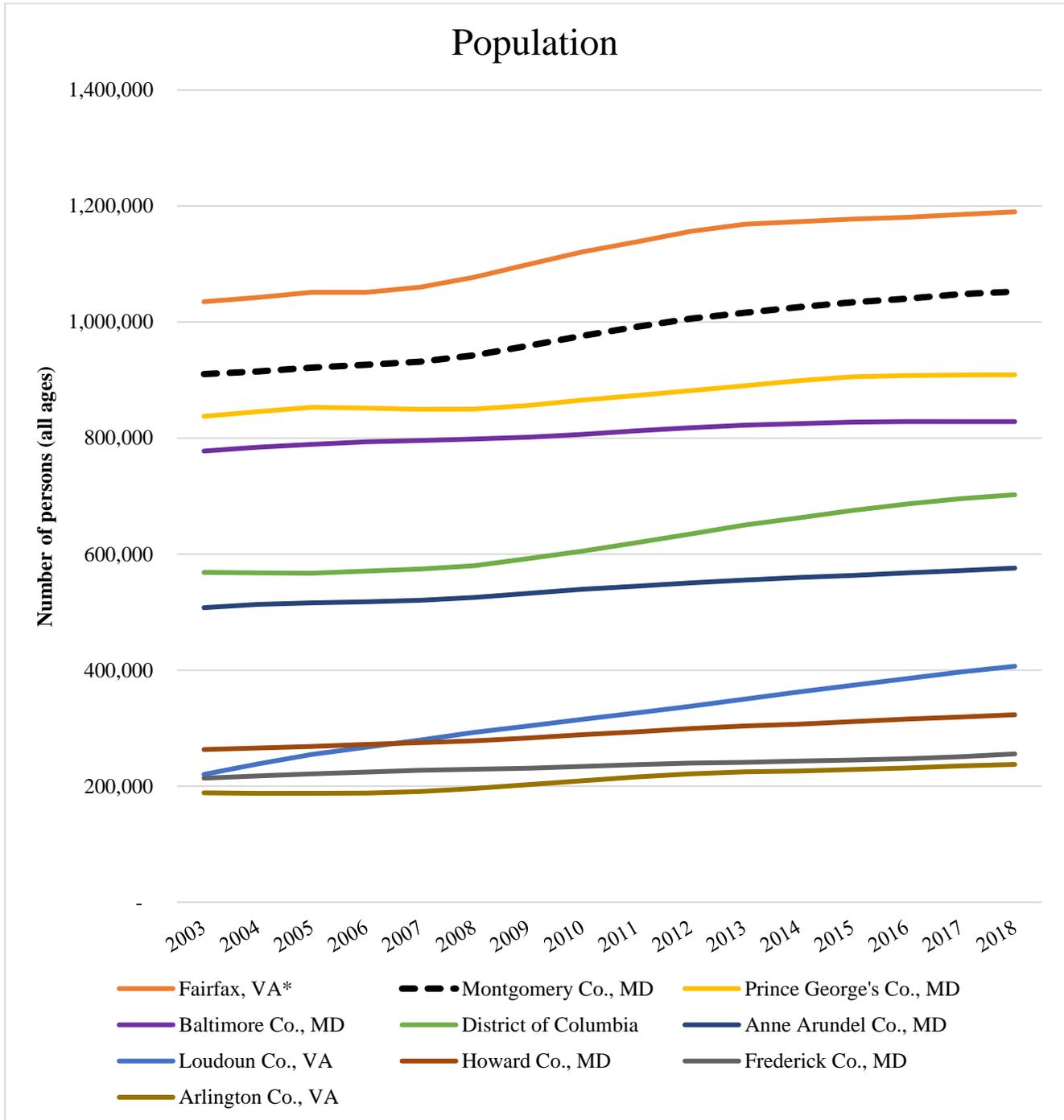
Compared to the prior year, the 2018 data in Table 3-1 show that every jurisdiction in the region except Baltimore County saw population growth. The State of Virginia's population grew 0.6 percent, the District of Columbia's population was up 1.0 percent and the State of Maryland's increased 0.3 percent.

In Maryland, Montgomery County's population rose 0.4 percent (+ 4,323 people) and Prince George's County's increased 0.1 percent (+ 507). Three smaller jurisdictions had growth rates of 0.8 percent or more, including Anne Arundel County (up 0.8 percent, +4,439), Howard County (+1.2 percent, +3,822), and Frederick County (+1.9 percent, +4,689).

### *Source of data:*

Regional Economic Accounts, Bureau of Economic Analysis (BEA), U.S. Department of Commerce.<sup>24</sup> BEA's data comes from Census Bureau midyear population estimates. Estimates for 2010-2018 reflect county population estimates available as of March 2019.

**Figure 3-1. Population, 2003-2018.**



\*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.

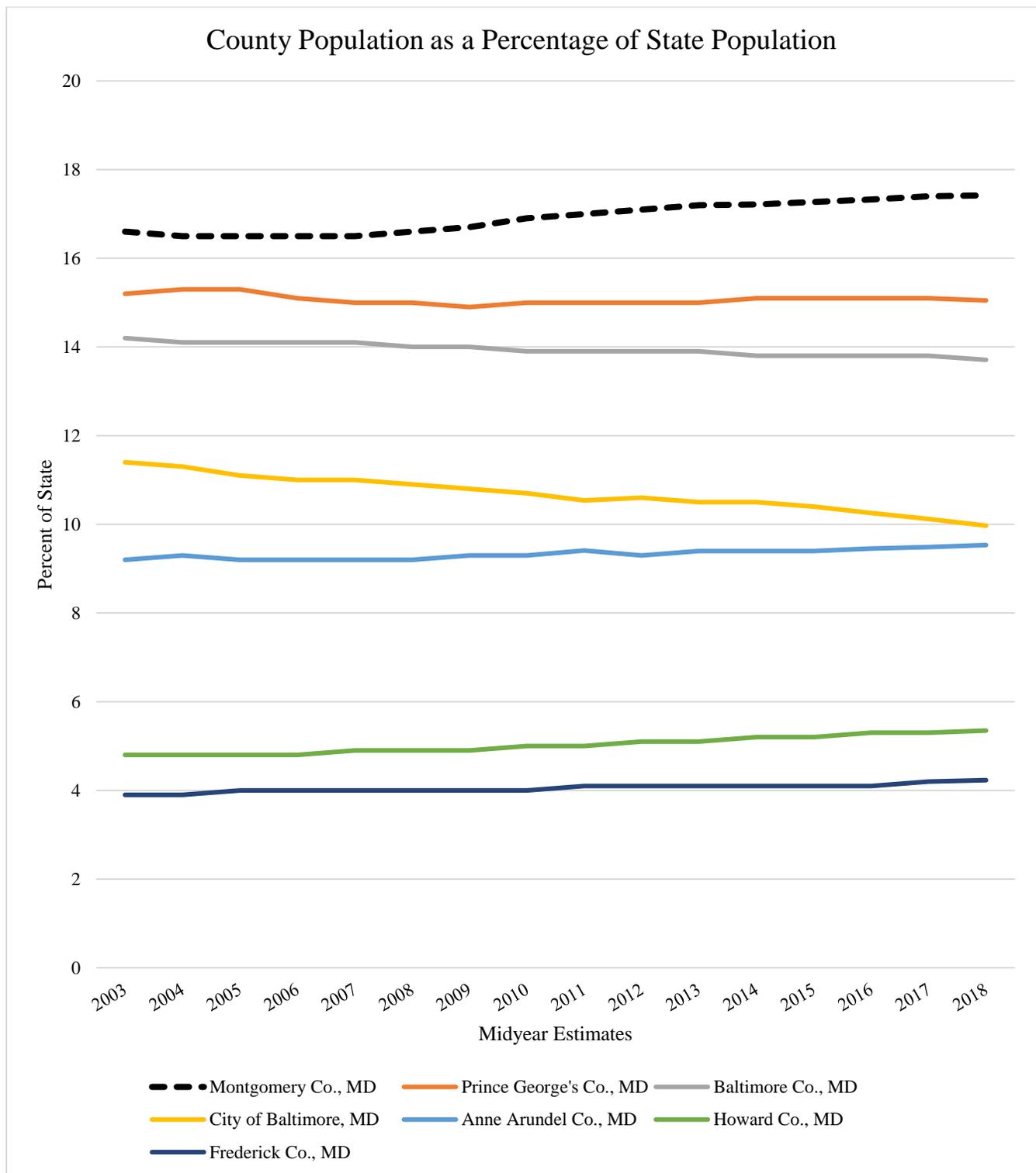
Data source: Regional Economic Accounts, Bureau of Economic Analysis (BEA), U.S. Department of Commerce.

**Table 3-1. Population, 2003-18.**

<b>Population (Number of persons) 1/</b>									
<b>Source: Regional Economic Data (CAINC1), Bureau of Economic Analysis, U.S. Department of Commerce</b>									
<b>FIPS</b>	<b>Name</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
51919	Fairfax, VA*	1,035,184	1,042,687	1,051,190	1,051,240	1,060,356	1,077,509	1,099,347	1,121,176
24031	Montgomery Co., MD	910,498	914,991	921,531	926,492	931,694	942,748	959,013	976,287
24033	Prince George's Co., MD	837,648	845,950	853,271	852,097	849,916	850,167	856,161	865,747
24005	Baltimore Co., MD	777,756	784,371	789,110	793,733	796,073	798,651	801,808	806,560
11000	District of Columbia	568,502	567,754	567,136	570,681	574,404	580,236	592,228	605,085
24003	Anne Arundel Co., MD	507,769	513,259	516,171	517,698	520,503	525,304	532,395	539,277
51107	Loudoun Co., VA	220,366	238,299	254,909	267,194	279,704	292,570	303,661	315,479
24027	Howard Co., MD	263,186	265,919	268,590	271,793	275,196	278,405	283,061	288,628
24021	Frederick Co., MD	213,827	217,776	221,201	224,211	227,463	229,286	230,942	234,204
51013	Arlington Co., VA	188,735	187,901	187,760	188,176	190,759	196,305	202,637	209,287
51000	Virginia	7,366,977	7,475,575	7,577,105	7,673,725	7,751,000	7,833,496	7,925,937	8,023,680
24000	Maryland	5,496,269	5,546,935	5,592,379	5,627,367	5,653,408	5,684,965	5,730,388	5,788,642
<b>FIPS</b>	<b>Name</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>
51919	Fairfax, VA*	1,138,530	1,156,496	1,168,622	1,173,342	1,177,440	1,180,846	1,185,534	1,190,141
24031	Montgomery Co., MD	991,833	1,005,852	1,016,064	1,025,617	1,033,994	1,040,245	1,048,244	1,052,567
24033	Prince George's Co., MD	873,679	881,870	890,117	899,223	905,737	907,939	908,801	909,308
24005	Baltimore Co., MD	812,797	818,023	822,238	825,006	827,471	828,616	828,603	828,431
11000	District of Columbia	619,602	634,725	650,431	662,513	675,254	686,575	695,691	702,455
24003	Anne Arundel Co., MD	544,744	550,311	555,438	559,691	563,502	567,665	571,592	576,031
51107	Loudoun Co., VA	326,319	337,881	349,978	362,290	374,054	385,524	396,995	406,850
24027	Howard Co., MD	293,579	299,213	303,583	306,998	311,449	315,619	319,374	323,196
24021	Frederick Co., MD	237,263	239,643	241,143	243,417	245,114	247,224	250,959	255,648
51013	Arlington Co., VA	215,972	221,463	224,938	226,043	228,746	231,582	235,121	237,521
51000	Virginia	8,100,469	8,185,229	8,253,053	8,312,076	8,362,907	8,410,946	8,465,207	8,517,685
24000	Maryland	5,838,991	5,887,072	5,923,704	5,958,165	5,986,717	6,004,692	6,024,891	6,042,718

**Legend / Footnotes:**  
1/ Census Bureau midyear population estimates. Estimates for 2010-2018 reflect county population estimates available as of March 2019.  
\* 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 14, 2019-- new statistics for 2018; revised statistics for 2001-2017.

**Figure 3-2. County Population as a Percentage of State Population, 2003-2018.**



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, 2003-2018.**

<b>Population (percent of state population) 1/</b>									
<b>Source: Regional Economic Data (CAINC1), Bureau of Economic Analysis, U.S. Department of Commerce</b>									
<b>Selected Maryland Counties:</b>									
<b>FIPS</b>	<b>Name</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
24031	Montgomery Co.	16.6	16.5	16.5	16.5	16.5	16.6	16.7	16.9
24033	Prince George's Co.	15.2	15.3	15.3	15.1	15.0	15.0	14.9	15.0
24005	Baltimore Co.	14.2	14.1	14.1	14.1	14.1	14.0	14.0	13.9
24510	City of Baltimore	11.4	11.3	11.1	11.0	11.0	10.9	10.8	10.7
24003	Anne Arundel Co.	9.2	9.3	9.2	9.2	9.2	9.2	9.3	9.3
24027	Howard Co.	4.8	4.8	4.8	4.8	4.9	4.9	4.9	5.0
24021	Frederick Co.	3.9	3.9	4.0	4.0	4.0	4.0	4.0	4.0
<b>FIPS</b>	<b>Name</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>
24031	Montgomery Co.	17.0	17.1	17.2	17.2	17.3	17.3	17.4	17.4
24033	Prince George's Co.	15.0	15.0	15.0	15.1	15.1	15.1	15.1	15.0
24005	Baltimore Co.	13.9	13.9	13.9	13.8	13.8	13.8	13.8	13.7
24510	City of Baltimore	10.5	10.6	10.5	10.5	10.4	10.3	10.1	10.0
24003	Anne Arundel Co.	9.4	9.3	9.4	9.4	9.4	9.5	9.5	9.5
24027	Howard Co.	5.0	5.1	5.1	5.2	5.2	5.3	5.3	5.3
24021	Frederick Co.	4.1	4.1	4.1	4.1	4.1	4.1	4.2	4.2
<b>Legend / Footnotes:</b>									
1/ Census Bureau midyear population estimates. Estimates for 2010-2018 reflect county population estimates available as of March 2019.									
Last updated: November 14, 2019-- new statistics for 2018; revised statistics for 2001-2017.									

### **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:*

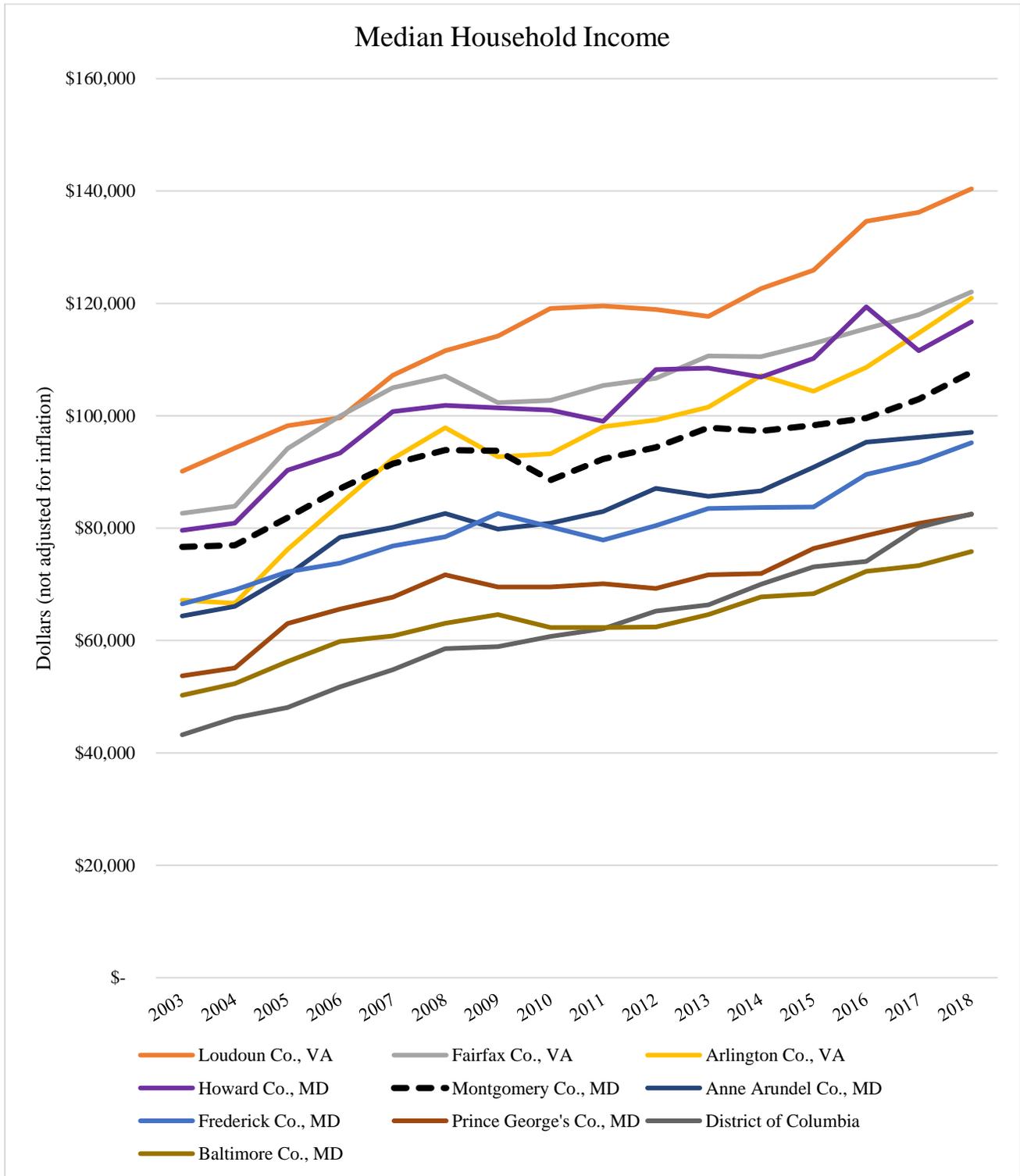
Figure 3-3 and Table 3-3 display MHI data for the 2003-2018 period. A comparison to the prior year shows Montgomery County's Medium Household Income (MHI) was up 4.7 percent (from \$102,944 in 2017 to \$107,758 in 2018). Montgomery County's MHI growth exceeded Maryland's MHI increase which rose 2.9 percent. Among the five other Maryland jurisdictions, the MHI data show:

- Three jurisdictions saw year over year increases that exceeded the statewide increase but were below that of Montgomery County. These increases were in Howard County (up 4.6 percent), Frederick County (up 3.8 percent) and Baltimore County (up 3.4 percent).
- Two jurisdictions saw increases that lagged the statewide increase. These increases were in Prince George's County (up 2.0 percent) and Anne Arundel County (up 1.0 percent).

#### *Source of data:*

Small Area Income and Poverty Estimates (SAIPE), Census Bureau, U.S. Department of Commerce.<sup>25</sup>

**Figure 3-3. Median Household Income, 2003-2018.**



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

**Table 3-3. Median Household Income, 2003-2018.**

<b>Median Household Income (in Dollars)</b>									
Source: Small Area Income and Poverty Estimates (SAIPE), Census Bureau, U.S. Department of Commerce									
<b>FIPS</b>	<b>Name</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
51107	Loudoun Co., VA	\$ 90,122	\$ 94,225	\$ 98,245	\$ 99,619	\$107,200	\$111,582	\$114,200	\$119,075
51059	Fairfax Co., VA	\$ 82,648	\$ 83,890	\$ 94,173	\$ 99,934	\$104,984	\$107,075	\$102,325	\$102,726
51013	Arlington Co., VA	\$ 67,161	\$ 66,626	\$ 76,196	\$ 84,316	\$ 92,345	\$ 97,871	\$ 92,703	\$ 93,231
24027	Howard Co., MD	\$ 79,607	\$ 80,904	\$ 90,311	\$ 93,349	\$100,744	\$101,867	\$101,417	\$100,992
24031	Montgomery Co., MD	\$ 76,669	\$ 76,957	\$ 81,874	\$ 87,019	\$ 91,440	\$ 93,895	\$ 93,774	\$ 88,559
24003	Anne Arundel Co., MD	\$64,362	\$66,087	\$71,609	\$78,389	\$80,158	\$82,616	\$79,843	\$80,908
24021	Frederick Co., MD	\$66,514	\$69,005	\$72,205	\$73,765	\$76,802	\$78,437	\$82,598	\$80,216
24033	Prince George's Co., MD	\$53,716	\$55,129	\$63,005	\$65,611	\$67,706	\$71,696	\$69,545	\$69,524
11000	District of Columbia	\$43,215	\$46,211	\$48,078	\$51,746	\$54,812	\$58,553	\$58,906	\$60,729
24005	Baltimore Co., MD	\$50,256	\$52,308	\$56,256	\$59,864	\$60,828	\$63,078	\$64,629	\$62,300
24000	Maryland	\$ 54,302	\$ 57,019	\$ 61,546	\$ 65,041	\$ 67,989	\$ 70,482	\$ 69,193	\$ 68,933
51000	Virginia	\$ 50,028	\$ 51,103	\$ 54,207	\$ 56,297	\$ 59,575	\$ 61,210	\$ 59,372	\$ 60,665
0	United States	\$ 43,318	\$ 44,334	\$ 46,242	\$ 48,451	\$ 50,740	\$ 52,029	\$ 50,221	\$ 50,046
<b>FIPS</b>	<b>Name</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>
51107	Loudoun Co., VA	\$119,525	\$118,934	\$117,680	\$122,641	\$125,900	\$134,609	\$136,191	\$140,382
51059	Fairfax Co., VA	\$105,409	\$106,690	\$110,658	\$110,507	\$112,844	\$115,518	\$117,989	\$122,035
51013	Arlington Co., VA	\$ 98,060	\$ 99,255	\$101,533	\$107,143	\$104,354	\$108,635	\$114,705	\$120,950
24027	Howard Co., MD	\$ 99,040	\$108,234	\$108,503	\$106,871	\$110,224	\$119,386	\$111,576	\$116,719
24031	Montgomery Co., MD	\$ 92,288	\$ 94,365	\$ 97,873	\$ 97,279	\$ 98,314	\$ 99,604	\$102,944	\$107,758
24003	Anne Arundel Co., MD	\$82,980	\$87,083	\$85,685	\$86,654	\$90,825	\$95,297	\$96,133	\$97,051
24021	Frederick Co., MD	\$77,872	\$80,427	\$83,489	\$83,698	\$83,746	\$89,541	\$91,727	\$95,196
24033	Prince George's Co., MD	\$70,114	\$69,258	\$71,682	\$71,904	\$76,366	\$78,680	\$80,858	\$82,445
11000	District of Columbia	\$62,087	\$65,231	\$66,326	\$69,992	\$73,115	\$74,093	\$80,153	\$82,533
24005	Baltimore Co., MD	\$62,309	\$62,413	\$64,624	\$67,766	\$68,317	\$72,305	\$73,309	\$75,836
24000	Maryland	\$ 70,075	\$ 71,169	\$ 72,482	\$ 73,851	\$ 75,784	\$ 78,787	\$ 80,711	\$83,076
51000	Virginia	\$ 61,877	\$ 61,782	\$ 62,745	\$ 64,923	\$ 66,263	\$ 68,127	\$ 71,518	\$72,600
0	United States	\$ 50,502	\$ 51,371	\$ 52,250	\$ 53,657	\$ 55,775	\$ 57,617	\$ 60,336	\$61,937

## **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 FPT 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 2018 FPT for a family of four with two children under age 18 was \$25,465; the 2018 FPT for a single person under age 65 was \$13,064.<sup>26</sup> 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.<sup>27</sup>

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:*

Figure 3-4 and Table 3-4 show that Montgomery County's poverty rate declined 0.9 percentage points, (from 9.3 to 8.4 percent), between 2017 and 2018. The District of Columbia's rate fell 1.7 points (from 26.2 to 24.5 percent) and Fairfax County's rate fell 1.4 points (from 8.6 to 7.2 percent.)

Across the ten local jurisdictions in Table 3-4, three saw an increase in the poverty rate for people under age 18 (Loudoun County, Anne Arundel County, and Prince George's County), one saw no change (Arlington County), and six saw a decrease in the poverty rate (including Montgomery County).

Among the six jurisdictions where rates fell, the District of Columbia, Fairfax County and Montgomery County saw the largest decreases. These declines were much larger than those in Howard County, Frederick County and Baltimore County which saw decreases of 0.2 percentage points or less.

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

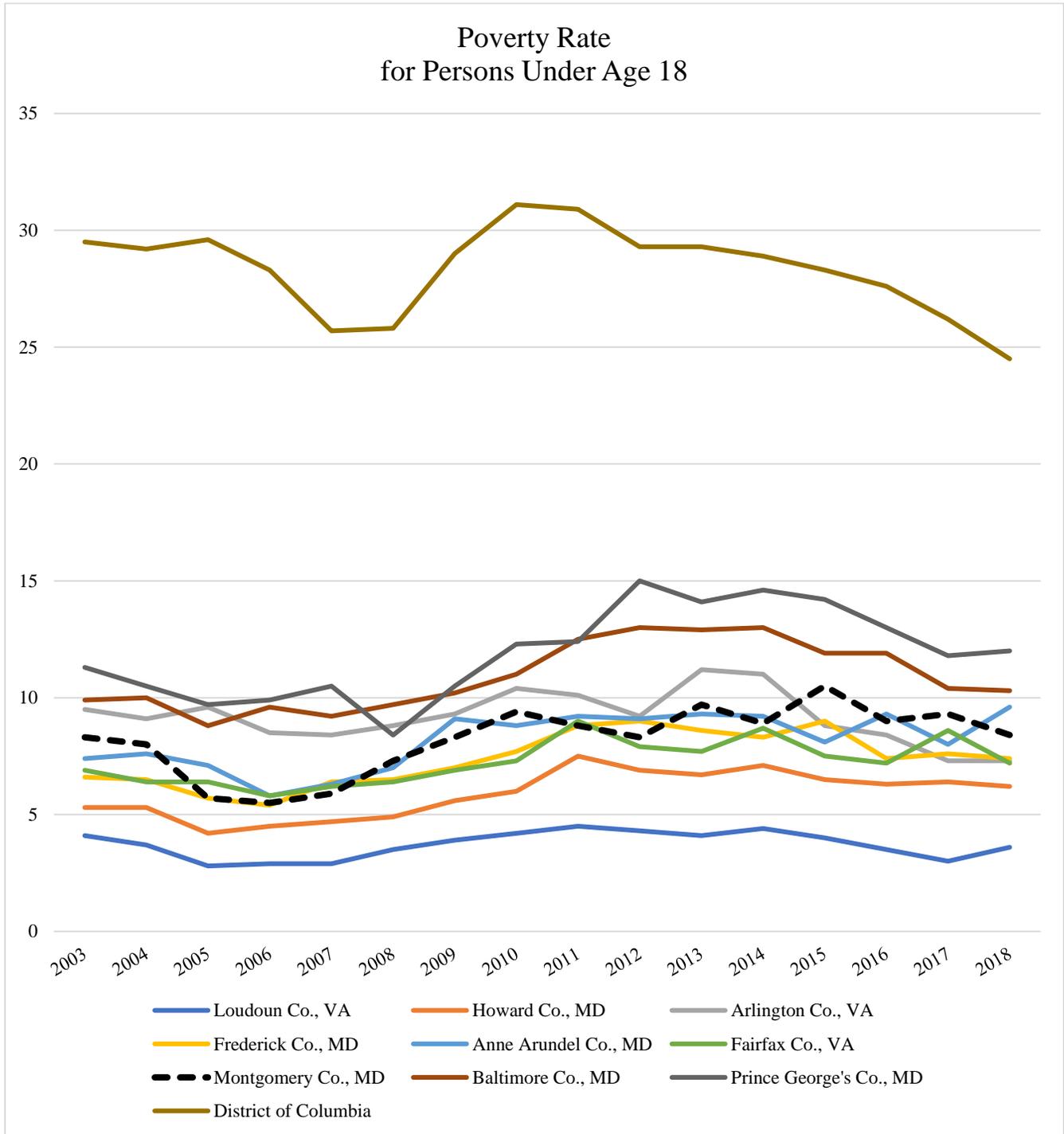
A drop in an area's poverty rate for children under age 18 might indicate that increased minimum wage rates are moving some households – including any children in that household -- out of poverty. A person working 40 hours a week for 52 weeks a year at the current federal minimum wage rate of \$7.25 per hour would earn about \$15,000, an income just above the 2018 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.

**Figure 3-4. Poverty Rate for Persons Under Age 18, 2003-2018.**



Data source: Small Area Income and Poverty Estimates (SAIPE), Census Bureau, U.S. Department of Commerce.<sup>28</sup>

**Table 3-4. Poverty Rate for Persons Under Age 18, 2003-2018.**

<b>Poverty Rate (Percent) for Persons Under Age 18</b>									
Source: Small Area Income and Poverty Estimates (SAIPE), Census Bureau, U.S. Department of Commerce									
<b>FIPS</b>	<b>Name</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
51107	Loudoun Co., VA	4.1	3.7	2.8	2.9	2.9	3.5	3.9	4.2
24027	Howard Co., MD	5.3	5.3	4.2	4.5	4.7	4.9	5.6	6.0
51013	Arlington Co., VA	9.5	9.1	9.6	8.5	8.4	8.8	9.3	10.4
24021	Frederick Co., MD	6.6	6.5	5.7	5.4	6.4	6.5	7.0	7.7
24003	Anne Arundel Co., MD	7.4	7.6	7.1	5.8	6.3	7.0	9.1	8.8
51059	Fairfax Co., VA	6.9	6.4	6.4	5.8	6.2	6.4	6.9	7.3
24031	Montgomery Co., MD	8.3	8.0	5.7	5.5	5.9	7.3	8.3	9.4
24005	Baltimore Co., MD	9.9	10.0	8.8	9.6	9.2	9.7	10.2	11.0
24033	Prince George's Co., MD	11.3	10.5	9.7	9.9	10.5	8.4	10.5	12.3
11000	District of Columbia	29.5	29.2	29.6	28.3	25.7	25.8	29.0	31.1
24000	Maryland	11.5	11.1	10.9	10.1	10.6	10.4	11.8	13.1
51000	Virginia	13.6	12.2	13.3	12.3	12.9	13.6	14.0	14.6
0	United States	17.6	17.8	18.5	18.3	18.0	18.2	20.0	21.6
<b>FIPS</b>	<b>Name</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>
51107	Loudoun Co., VA	4.5	4.3	4.1	4.4	4.0	3.5	3.0	3.6
24027	Howard Co., MD	7.5	6.9	6.7	7.1	6.5	6.3	6.4	6.2
51013	Arlington Co., VA	10.1	9.2	11.2	11.0	8.8	8.4	7.3	7.3
24021	Frederick Co., MD	8.8	9.0	8.6	8.3	9.0	7.4	7.6	7.4
24003	Anne Arundel Co., MD	9.2	9.1	9.3	9.2	8.1	9.3	8.0	9.6
51059	Fairfax Co., VA	9.0	7.9	7.7	8.7	7.5	7.2	8.6	7.2
24031	Montgomery Co., MD	8.8	8.3	9.7	8.9	10.5	9.0	9.3	8.4
24005	Baltimore Co., MD	12.5	13.0	12.9	13.0	11.9	11.9	10.4	10.3
24033	Prince George's Co., MD	12.4	15.0	14.1	14.6	14.2	13.0	11.8	12.0
11000	District of Columbia	30.9	29.3	29.3	28.9	28.3	27.6	26.2	24.5
24000	Maryland	13.9	14.1	13.9	13.8	13.9	13.0	12.4	12.1
51000	Virginia	15.6	15.5	15.7	15.9	15.0	14.3	14.0	13.8
0	United States	22.5	22.6	22.2	21.7	20.7	19.5	18.4	18.0

## **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.)<sup>29</sup> SNAP income limits are set at about 130 percent of the federal poverty thresholds. 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.<sup>30</sup> 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.<sup>31</sup>

### *Current data and definitional changes to the indicator*

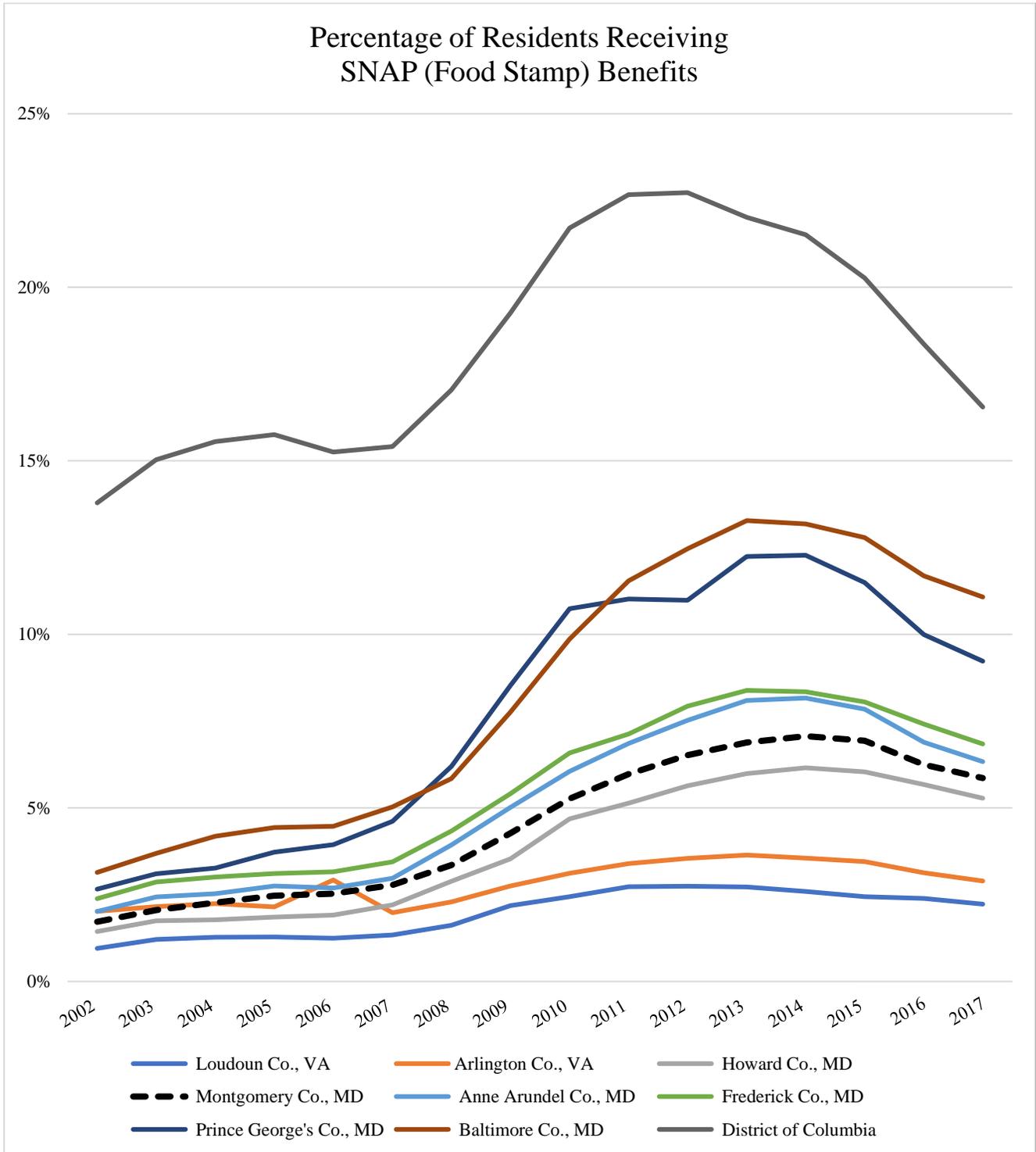
Figure 3-5 and Table 3-5 reflect Census Bureau revisions to the numbers for 2017. Data for 2018 are not displayed because, as of January 2020, the Census Bureau had published only six months of data.

From 2016 to 2017, every jurisdiction saw declines in the percentage of residents receiving SNAP benefits. The District of Columbia saw the largest decrease (down 1.8 percentage points). Maryland, Virginia and six local jurisdictions saw declines of one percentage point or less. They include Prince George's County (down 0.8 points), Maryland (down 0.7 points), decreases of 0.6 points in Anne Arundel County, Baltimore County, Frederick County and Virginia and declines of 0.4 points in Howard County and Montgomery County.

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 ABAWDs receiving SNAP live in waived areas.<sup>32</sup>

The rule changes take 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. As a result, in next year's report, OLO may revise or replace this indicator.

**Figure 3-5. Percentage of Residents Receiving SNAP (Food Stamp) Benefits, 2002-2017.**



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, 2002-2017.**

<b>Percentage of Residents Receiving SNAP (Food Stamp) Benefits</b>									
Data source: Small Area Income and Poverty Estimates (SAIPE) from the Census Bureau, and Regional Economic Data from the Bureau of Economic Analysis, U.S. Department of Commerce.									
<b>FIPS</b>	<b>Name</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>
51107	Loudoun Co., VA	1.0%	1.2%	1.3%	1.3%	1.2%	1.3%	1.6%	2.2%
51013	Arlington Co., VA	2.0%	2.2%	2.2%	2.2%	2.9%	2.0%	2.3%	2.8%
24027	Howard Co., MD	1.4%	1.7%	1.8%	1.9%	1.9%	2.2%	2.9%	3.5%
24031	Montgomery Co., MD	1.7%	2.1%	2.3%	2.5%	2.5%	2.8%	3.4%	4.3%
24003	Anne Arundel Co., MD	2.0%	2.4%	2.5%	2.8%	2.7%	3.0%	3.9%	5.0%
24021	Frederick Co., MD	2.4%	2.9%	3.0%	3.1%	3.2%	3.4%	4.3%	5.4%
24033	Prince George's Co., MD	2.7%	3.1%	3.3%	3.7%	3.9%	4.6%	6.2%	8.5%
24005	Baltimore Co., MD	3.1%	3.7%	4.2%	4.4%	4.5%	5.0%	5.8%	7.8%
11000	District of Columbia	13.8%	15.0%	15.6%	15.8%	15.2%	15.4%	17.0%	19.3%
51000	Virginia	5.2%	5.9%	6.5%	6.6%	6.7%	6.9%	7.8%	9.6%
24000	Maryland	4.5%	4.9%	5.1%	5.4%	5.5%	6.1%	7.5%	9.3%
<b>FIPS</b>	<b>Name</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>
51107	Loudoun Co., VA	2.4%	2.7%	2.7%	2.7%	2.6%	2.4%	2.4%	2.2%
51013	Arlington Co., VA	3.1%	3.4%	3.5%	3.6%	3.6%	3.5%	3.1%	2.9%
24027	Howard Co., MD	4.7%	5.1%	5.6%	6.0%	6.2%	6.0%	5.7%	5.3%
24031	Montgomery Co., MD	5.3%	6.0%	6.5%	6.9%	7.1%	6.9%	6.2%	5.9%
24003	Anne Arundel Co., MD	6.1%	6.9%	7.5%	8.1%	8.2%	7.8%	6.9%	6.3%
24021	Frederick Co., MD	6.6%	7.1%	7.9%	8.4%	8.3%	8.1%	7.4%	6.8%
24033	Prince George's Co., MD	10.7%	11.0%	11.0%	12.2%	12.3%	11.5%	10.0%	9.2%
24005	Baltimore Co., MD	9.9%	11.5%	12.5%	13.3%	13.2%	12.8%	11.7%	11.1%
11000	District of Columbia	21.7%	22.7%	22.7%	22.0%	21.5%	20.3%	18.4%	16.6%
51000	Virginia	10.5%	11.2%	11.4%	11.3%	10.5%	10.0%	9.4%	8.8%
24000	Maryland	11.2%	12.1%	12.8%	13.3%	13.1%	12.7%	11.6%	10.9%

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 are as follows:<sup>33</sup>

- *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 County Business Patterns (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.<sup>34</sup>
- *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 makes adjustments to 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 indicated 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.<sup>35</sup> 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 people 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 the 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 and 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:*

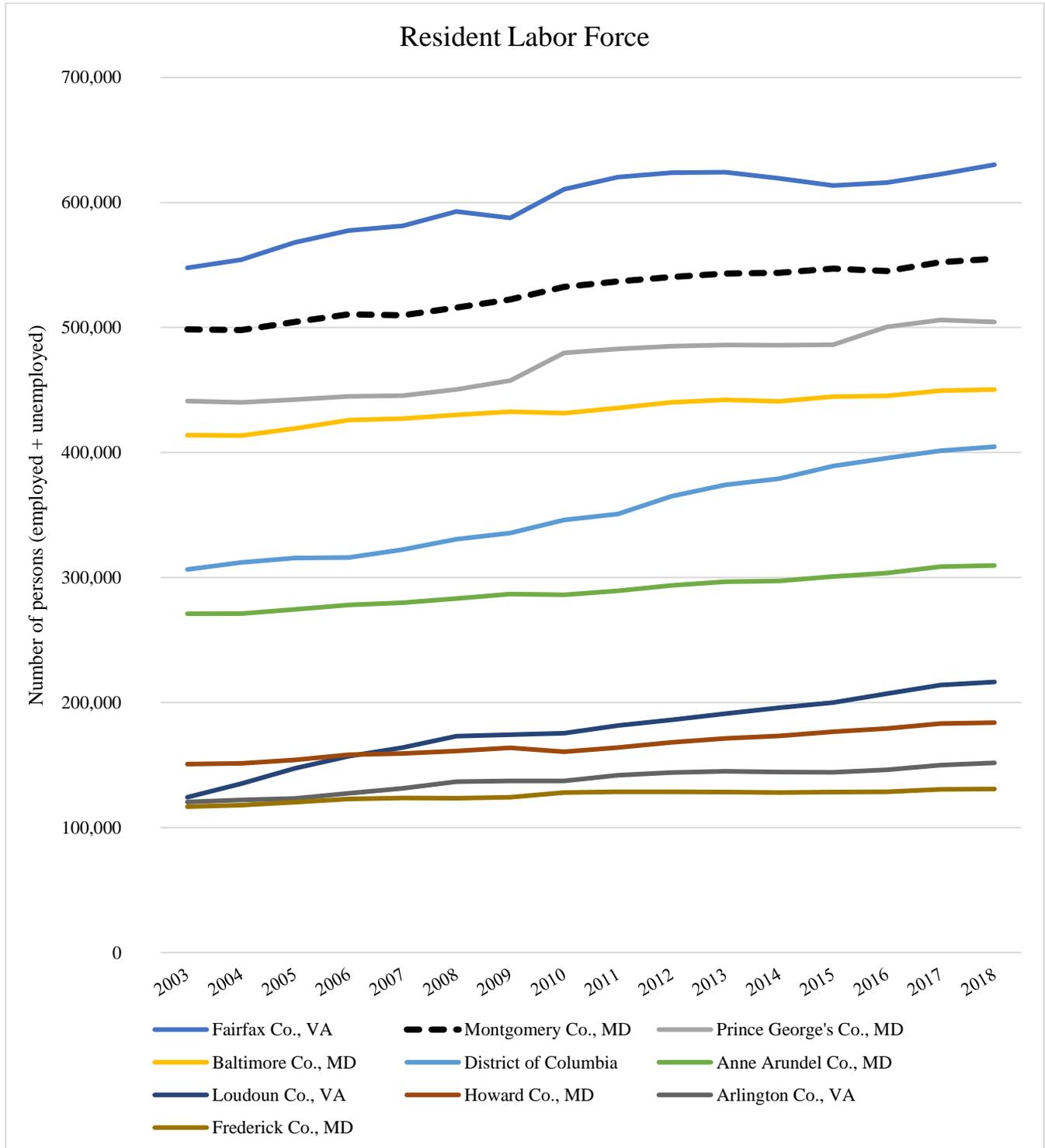
Figure 3-6 and Table 3-6 reflect new April 2019 LAUS data, as well as BLS revisions to LAUS data for prior years. LAUS data continue to show steady growth in the resident labor forces for Montgomery County and the surrounding area.

Figure 3-6 shows that between 2017 and 2018, the rankings of the 10 jurisdictions by labor force size stayed the same, with the District of Columbia's labor force continuing to close in on Baltimore County's.

A comparison of resident labor force growth rates shows that increases in Virginia outpaced those in the District of Columbia or Maryland.

- In Virginia, Fairfax County's resident labor force increased by 1.2 percent (+7,475 people), Arlington County's labor force increased by 1.3 percent (+1,884 people) and Loudoun County's labor force increased by 1.1 percent (+2,429 people.).
- The District of Columbia's resident labor force increased by 0.8 percent (+3,160 people).
- In Maryland, Montgomery County's labor force growth was up 0.5 percent (+2,676 people). By comparison, labor force increases in Howard County, Anne Arundel and Baltimore County were 0.4 percent or less, and Prince George's County saw a decline of 0.3 percent.

**Figure 3-6. Resident Labor Force, 2003-2018.**



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

**Table 3-6. Resident Labor Force, 2003-2018.**

<b>Resident Labor Force /1</b>									
Source: Local Area Unemployment Statistics (LAUS), Bureau of Labor Statistics, U.S. Department of Labor (April 19, 2019).									
<b>LAUSCode</b>	<b>Name</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
CN5105900000000	Fairfax Co., VA	547,743	554,326	568,187	577,489	581,377	592,899	587,584	610,521
CN2403100000000	Montgomery Co., MD	498,402	497,950	504,410	510,593	509,769	515,987	522,421	532,572
CN2403300000000	Prince George's Co., MD	441,104	440,080	442,341	444,907	445,492	450,361	457,576	479,626
CN2400500000000	Baltimore Co., MD	413,908	413,537	419,256	425,938	427,026	430,124	432,708	431,530
CN1100100000000	District of Columbia	306,422	312,027	315,616	316,083	322,237	330,544	335,672	346,065
CN2400300000000	Anne Arundel Co., MD	271,014	271,155	274,457	277,964	279,882	283,135	286,650	286,070
CN5110700000000	Loudoun Co., VA	124,224	135,147	147,280	156,992	163,971	173,148	174,290	175,439
CN2402700000000	Howard Co., MD	150,740	151,348	154,170	158,285	159,215	161,287	163,780	160,638
CN5101300000000	Arlington Co., VA	120,433	121,992	123,328	127,332	131,366	136,705	137,201	137,368
CN2402100000000	Frederick Co., MD	116,690	117,954	120,349	122,779	123,692	123,410	124,142	127,913
<b>LAUSCode</b>	<b>Name</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>
CN5105900000000	Fairfax Co., VA	620,197	623,843	624,266	619,387	613,502	615,850	622,754	630,229
CN2403100000000	Montgomery Co., MD	536,858	540,440	543,131	543,806	547,058	545,139	552,313	554,989
CN2403300000000	Prince George's Co., MD	482,936	484,976	486,017	485,869	486,296	500,516	506,033	504,423
CN2400500000000	Baltimore Co., MD	435,564	440,264	442,221	441,060	444,695	445,314	449,508	450,366
CN1100100000000	District of Columbia	350,778	364,989	374,126	379,123	389,218	395,424	401,450	404,610
CN2400300000000	Anne Arundel Co., MD	289,348	293,697	296,544	297,176	300,734	303,551	308,684	309,603
CN5110700000000	Loudoun Co., VA	181,515	186,073	191,048	195,838	200,016	206,982	214,004	216,433
CN2402700000000	Howard Co., MD	163,953	168,218	171,321	173,235	176,626	179,270	183,114	183,889
CN5101300000000	Arlington Co., VA	141,853	144,012	145,047	144,432	144,256	146,165	149,836	151,720
CN2402100000000	Frederick Co., MD	128,573	128,608	128,454	127,923	128,447	128,673	130,528	130,831
1/ Labor Force = Employed persons + Unemployed persons, by place-of-residence.									
<a href="http://www.bls.gov/lau/">www.bls.gov/lau/</a>									

## **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.<sup>36</sup>

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.<sup>37</sup>

### *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.<sup>38</sup>

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:*

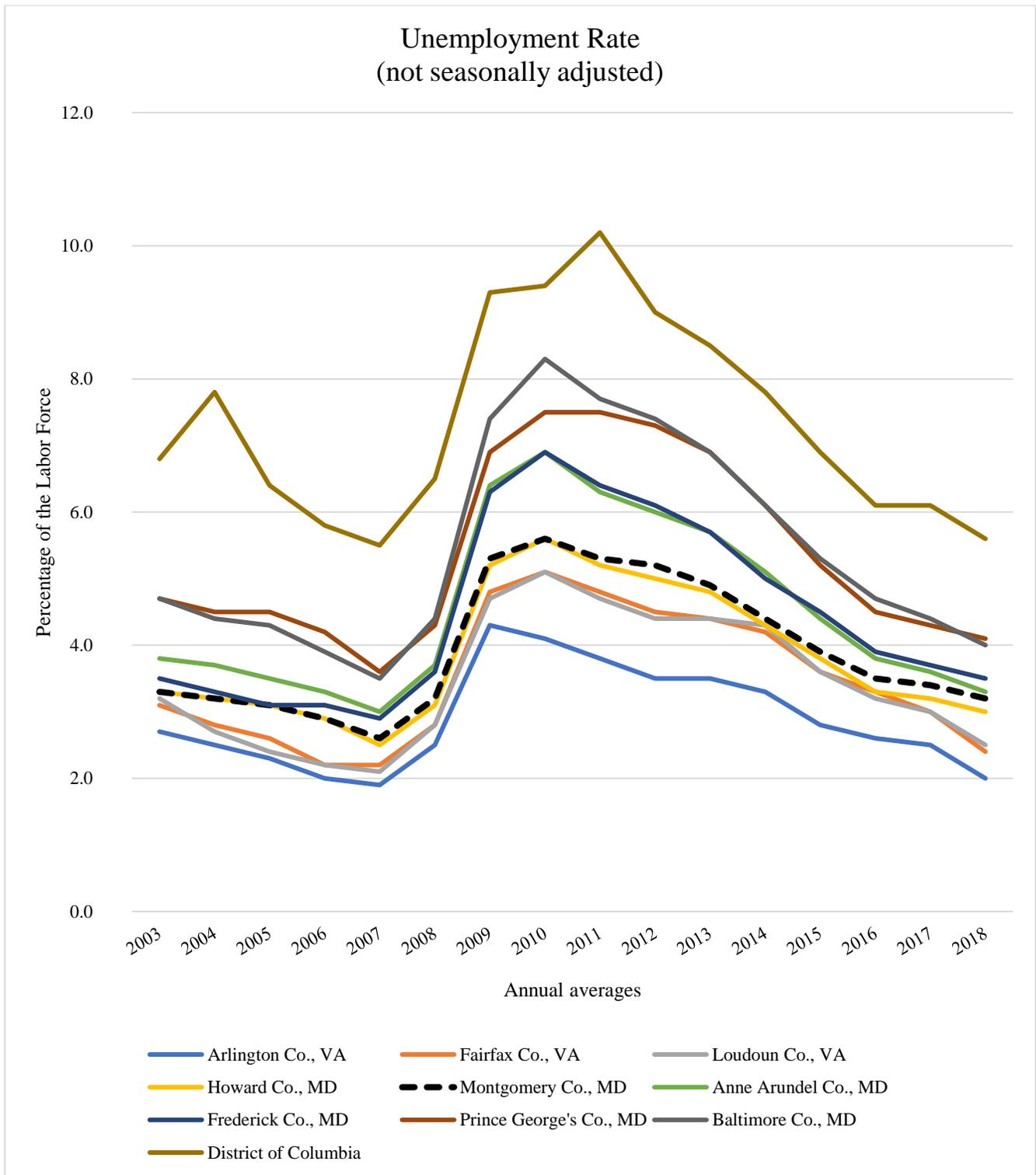
Local Area Unemployment Statistics (LAUS), Bureau of Labor Statistics, U.S. Department of Labor.

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 new April 2019 LAUS data, as well as BLS revisions to LAUS data for prior years. Resident unemployment rates across the jurisdictions show a steady decline since 2010. From 2017 to 2018, Fairfax County's unemployment rate fell 0.6 percentage points to 2.4 percent. Rates in Arlington County and Loudoun County dropped 0.5 points each to 2.0 percent and 2.5 percent respectively. The District of Columbia's rate declined 0.5 points, from 6.1 percent to 5.6 percent and Montgomery County's rate declined 0.2 points from 3.4 percent to 3.2 percent.

**Figure 3-7. Unemployment Rate (not seasonally adjusted), 2003-2018.**



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

**Table 3-7. Unemployment Rate (not seasonally adjusted), 2003-2018.**

<b>Unemployment Rate (%) /1</b>									
Source: Local Area Unemployment Statistics (LAUS), Bureau of Labor Statistics, U.S. Department of Labor (April 19, 2019)									
<b>LAUSCode</b>	<b>Name</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
CN5101300000000	Arlington Co., VA	2.7	2.5	2.3	2.0	1.9	2.5	4.3	4.1
CN5191900000000	Fairfax Co., VA	3.1	2.8	2.6	2.2	2.2	2.8	4.8	5.1
CN5110700000000	Loudoun Co., VA	3.2	2.7	2.4	2.2	2.1	2.8	4.7	5.1
CN2402700000000	Howard Co., MD	3.3	3.2	3.1	2.9	2.5	3.1	5.2	5.6
CN2403100000000	Montgomery Co., MD	3.3	3.2	3.1	2.9	2.6	3.2	5.3	5.6
CN2400300000000	Anne Arundel Co., MD	3.8	3.7	3.5	3.3	3.0	3.7	6.4	6.9
CN2402100000000	Frederick Co., MD	3.5	3.3	3.1	3.1	2.9	3.6	6.3	6.9
CN2403300000000	Prince George's Co., MD	4.7	4.5	4.5	4.2	3.6	4.3	6.9	7.5
CN2400500000000	Baltimore Co., MD	4.7	4.4	4.3	3.9	3.5	4.4	7.4	8.3
CN1100100000000	District of Columbia	6.8	7.8	6.4	5.8	5.5	6.5	9.3	9.4
<b>LAUSCode</b>	<b>Name</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>
CN5101300000000	Arlington Co., VA	3.8	3.5	3.5	3.3	2.8	2.6	2.5	2.0
CN5191900000000	Fairfax Co., VA	4.8	4.5	4.4	4.2	3.6	3.3	3.0	2.4
CN5110700000000	Loudoun Co., VA	4.7	4.4	4.4	4.3	3.6	3.2	3.0	2.5
CN2402700000000	Howard Co., MD	5.2	5.0	4.8	4.3	3.8	3.3	3.2	3.0
CN2403100000000	Montgomery Co., MD	5.3	5.2	4.9	4.4	3.9	3.5	3.4	3.2
CN2400300000000	Anne Arundel Co., MD	6.3	6.0	5.7	5.1	4.4	3.8	3.6	3.3
CN2402100000000	Frederick Co., MD	6.4	6.1	5.7	5.0	4.5	3.9	3.7	3.5
CN2403300000000	Prince George's Co., MD	7.5	7.3	6.9	6.1	5.2	4.5	4.3	4.1
CN2400500000000	Baltimore Co., MD	7.7	7.4	6.9	6.1	5.3	4.7	4.4	4.0
CN1100100000000	District of Columbia	10.2	9.0	8.5	7.8	6.9	6.1	6.1	5.6

1/ Annual averages, not seasonally adjusted.

## **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).<sup>39</sup>

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 has been a growing category of employment over the last decade.<sup>40</sup> 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.<sup>41</sup>

### *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:*

BEA statistics for 2018 estimate the size of the County's total employment base at 728,259 jobs (Table 3-8) and the size of its wage and salary employment at 517,537 jobs (Table 3-9). Compared to the data available last year, the total employment base added roughly 13,500 jobs and grew by 1.9 percent.

The growth of Montgomery County's total employment base lagged that of Fairfax County which added 25,000 jobs and expanded by 2.8 percent. But, total employment growth in Montgomery County outpaced that of the District of Columbia which added 12,700 jobs and grew by 1.4 percent.

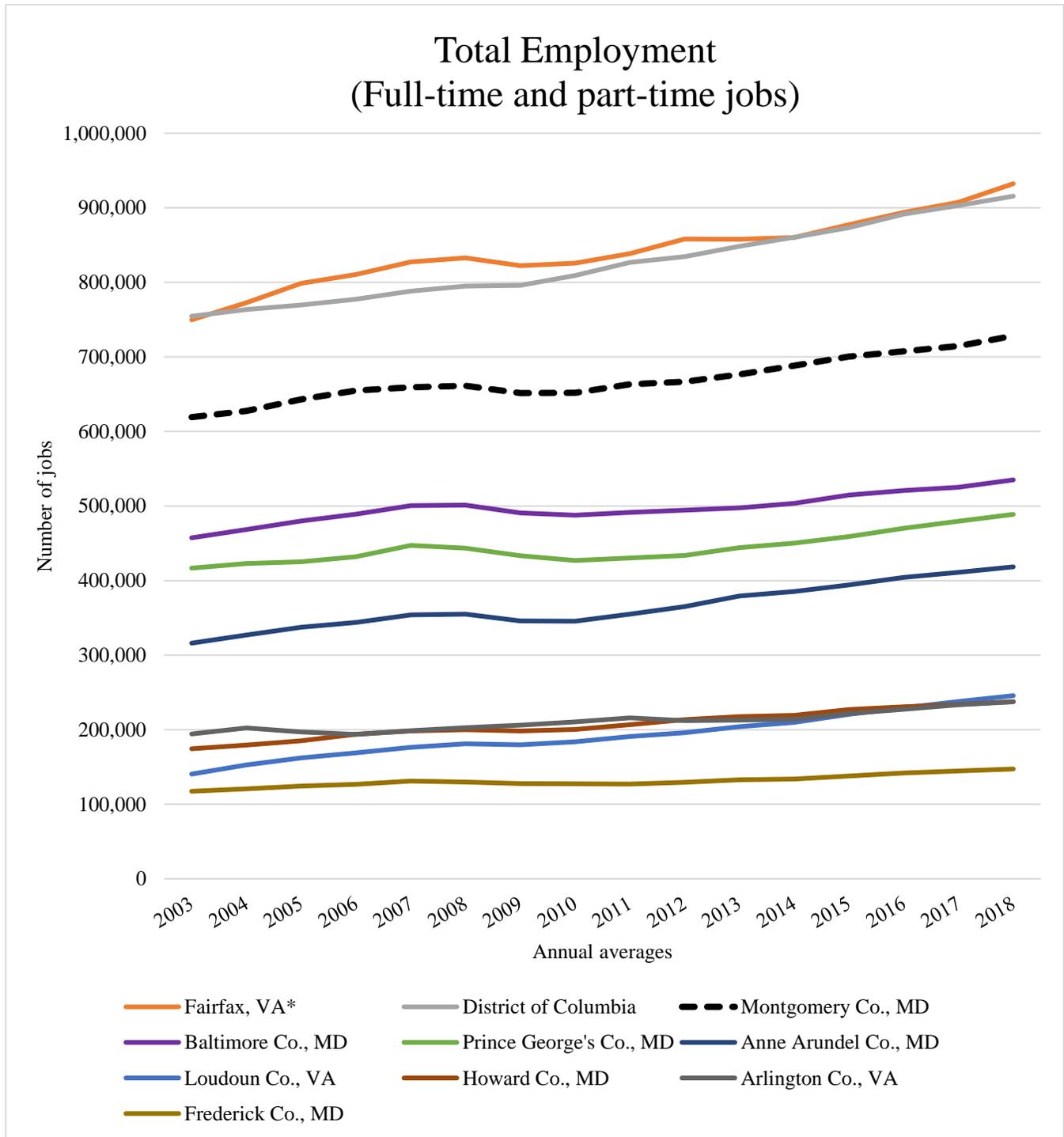
### *Source of data:*

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 the QCEW statistics because BEA makes adjustments to include 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, 2003-2018.**

\*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, 2003-2018.**

<b>Total Employment (Number of jobs)</b>									
<b>CAEMP25N Total Full-Time and Part-Time Employment 1/</b>									
<b>Source: Regional Economic Accounts, Bureau of Economic Analysis (BEA), U.S. Department of Commerce.</b>									
<b>FIPS</b>	<b>Name</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
51919	Fairfax, VA*	749,746	772,605	798,631	810,456	827,412	832,867	822,361	825,687
11000	District of Columbia	754,602	763,470	769,796	777,525	788,410	794,912	795,912	809,137
24031	Montgomery Co., MD	619,216	627,510	642,914	654,699	659,374	661,376	651,521	651,834
24005	Baltimore Co., MD	457,341	468,364	479,855	489,082	500,525	501,097	490,819	487,862
24033	Prince George's Co., MD	416,696	423,023	425,276	432,115	447,324	443,519	433,377	426,807
24003	Anne Arundel Co., MD	316,065	327,006	337,487	343,831	353,880	354,876	345,913	345,618
51107	Loudoun Co., VA	140,449	152,780	162,117	168,881	176,203	181,061	179,822	183,855
24027	Howard Co., MD	174,407	179,546	185,045	193,851	198,183	200,059	198,351	200,426
51013	Arlington Co., VA	194,238	202,405	197,039	193,707	198,545	202,775	205,930	210,386
24021	Frederick Co., MD	117,372	120,696	124,443	126,817	131,069	129,844	127,808	127,543
51000	Virginia	4,467,387	4,587,103	4,701,063	4,781,825	4,869,348	4,870,415	4,758,119	4,743,189
24000	Maryland	3,191,309	3,247,756	3,310,820	3,378,396	3,440,607	3,430,882	3,359,485	3,345,423
<b>FIPS</b>	<b>Name</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>
51919	Fairfax, VA*	838,615	858,111	857,784	860,180	877,427	893,849	907,332	932,345
11000	District of Columbia	826,761	834,413	848,226	860,669	873,193	891,451	902,940	915,637
24031	Montgomery Co., MD	663,362	666,825	676,398	688,127	700,374	707,590	714,788	728,259
24005	Baltimore Co., MD	491,560	494,593	497,574	503,410	514,668	520,752	525,330	535,059
24033	Prince George's Co., MD	430,315	433,821	444,116	450,101	459,158	470,070	479,769	488,809
24003	Anne Arundel Co., MD	355,144	365,034	379,189	385,251	394,296	404,361	410,968	418,428
51107	Loudoun Co., VA	190,953	195,925	203,898	209,689	220,484	229,517	237,826	245,650
24027	Howard Co., MD	206,672	213,578	217,451	219,357	227,027	230,885	233,913	237,767
51013	Arlington Co., VA	215,762	212,248	212,978	213,861	221,688	227,205	233,308	237,379
24021	Frederick Co., MD	127,197	129,332	132,844	133,884	137,922	142,010	144,645	147,281
51000	Virginia	4,802,678	4,856,886	4,898,765	4,953,354	5,060,545	5,142,525	5,229,218	5,325,308
24000	Maryland	3,394,831	3,438,880	3,493,921	3,537,654	3,602,938	3,656,163	3,702,196	3,762,122
<b>Legend / Footnotes:</b>									
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 14, 2019-- new statistics for 2018; revised statistics for 2001-2017.									

## **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.<sup>42</sup> Wages and salaries include commissions, tips, and bonuses.<sup>43</sup>

### *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:*

Current BEA data show modest increases in wage and salary employment by place of work for Montgomery County and the surrounding area. From 2017 to 2018, growth of the County's wage and salary job base kept pace with the District of Columbia's base but lagged that of Fairfax County:

- Montgomery County added 5,800 wage and salary jobs for a growth rate of 1.1 percent;
- The District of Columbia added 8,200 jobs for a growth rate of 1.0 percent; and
- Fairfax County added 17,500 jobs for a growth rate of 2.4 percent.

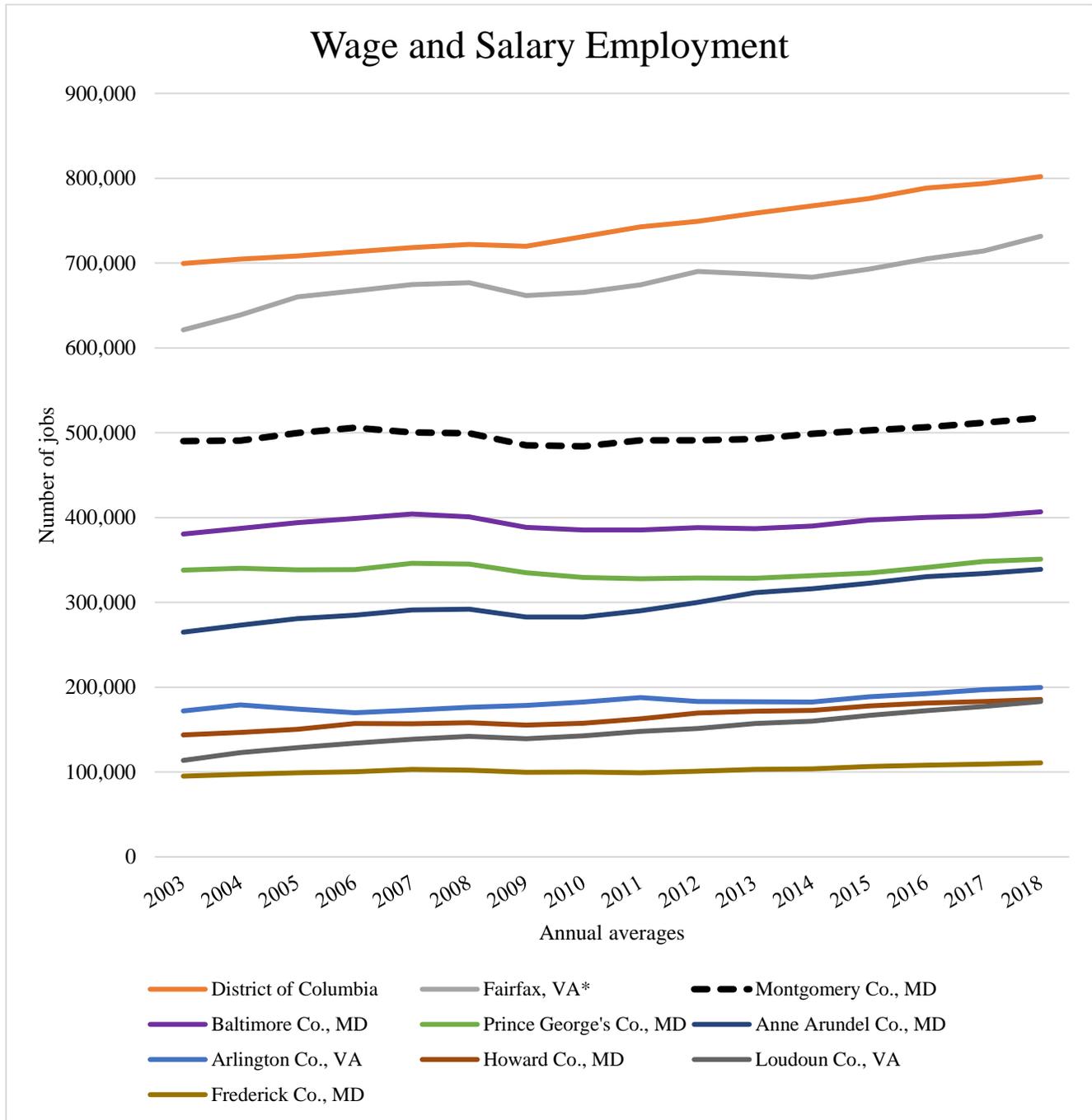
### *Source of data:*

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

The Quarterly Census of Employment and Wages (QCEW) statistics from the Bureau of Labor Statistics comprises 95 percent of BEA's wage and salary income estimates, but BEA estimates can differ from

the QCEW statistics because BEA makes adjustments to include employment and wages not covered by public unemployment insurance programs. (For example, QCEW statistics do not include domestic servants in private households or employees of religiously-affiliated private schools.)

**Figure 3-9. Wage and Salary Employment, 2003-2018.**



\*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, 2003-2018.**

<b>Wage and salary employment (Number of jobs)</b>									
Source: Regional Economic Accounts (CAINC4), Bureau of Economic Analysis (BEA), U.S. Department of Commerce.									
<b>FIPS</b>	<b>Name</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
11001	District of Columbia	699,519	704,817	708,380	713,309	718,308	721,890	719,705	731,389
51919	Fairfax, VA*	621,190	638,932	660,274	667,303	674,791	676,747	661,733	665,417
24031	Montgomery Co., MD	490,198	490,654	499,566	505,780	500,339	499,329	485,194	484,033
24005	Baltimore Co., MD	380,554	387,127	393,948	398,866	404,186	400,650	388,574	385,402
24033	Prince George's Co., MD	338,040	340,052	338,285	338,729	345,962	345,026	334,865	329,409
24003	Anne Arundel Co., MD	264,872	273,000	280,982	284,714	291,071	292,003	282,621	282,829
51013	Arlington Co., VA	172,059	179,268	174,150	169,884	173,088	176,207	178,389	182,675
24027	Howard Co., MD	143,767	146,798	150,296	157,070	156,946	158,220	155,264	157,478
51107	Loudoun Co., VA	113,718	122,748	128,747	134,060	138,490	141,998	139,239	142,560
24021	Frederick Co., MD	95,146	97,237	99,006	100,282	103,068	102,109	99,821	100,058
<b>FIPS</b>	<b>Name</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>
11001	District of Columbia	742,832	749,247	758,641	767,306	775,927	788,290	793,692	801,884
51919	Fairfax, VA*	674,306	690,259	687,041	683,286	692,836	704,859	714,099	731,590
24031	Montgomery Co., MD	490,982	491,037	492,602	498,762	502,893	506,373	511,694	517,537
24005	Baltimore Co., MD	385,362	388,060	386,933	390,087	396,945	400,087	401,592	406,707
24033	Prince George's Co., MD	327,861	328,812	328,497	331,572	334,648	341,018	348,194	350,934
24003	Anne Arundel Co., MD	290,026	300,158	311,460	316,170	322,725	330,350	334,055	338,956
51013	Arlington Co., VA	187,670	183,283	182,787	182,442	188,732	192,567	197,081	199,684
24027	Howard Co., MD	162,641	169,433	171,784	172,517	177,763	181,298	183,281	185,528
51107	Loudoun Co., VA	147,796	151,431	157,212	160,056	166,919	172,211	177,368	183,133
24021	Frederick Co., MD	99,081	100,978	103,077	103,643	106,500	107,926	109,189	110,769
<b>Legend / Footnotes:</b>									
* 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 14, 2019-- new statistics for 2018; revised statistics for 2001-2017.									

## **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:*

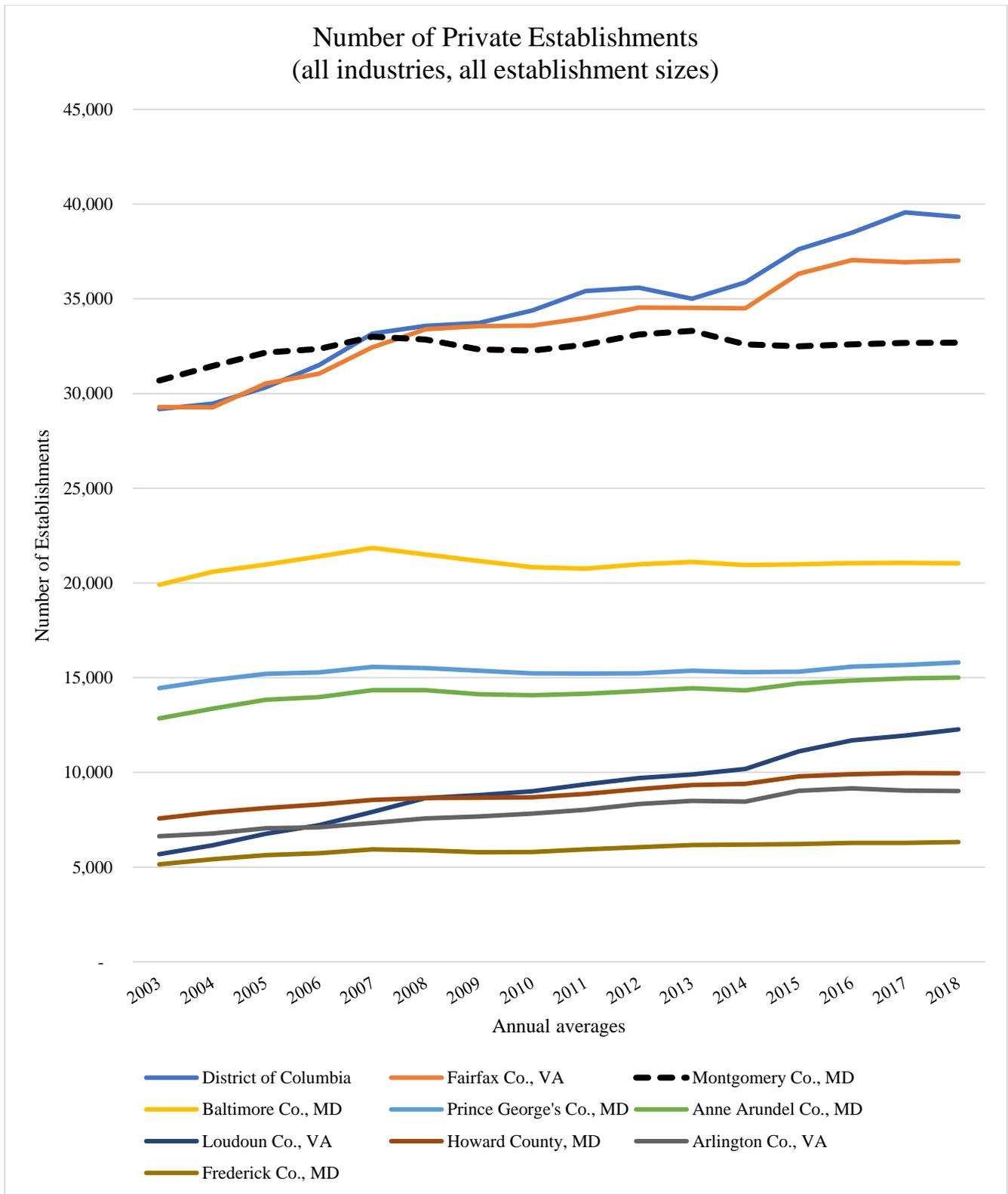
Quarterly Census of Employment and Wages (QCEW), Bureau of Labor Statistics, U.S. Department of Labor.<sup>44</sup>

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 little change, as compared to last year, in the number of private establishments in Montgomery County and the surrounding jurisdictions. About half of the jurisdictions saw a decline, five saw an increase and Montgomery County was virtually unchanged. The District of Columbia, with a loss of 240 private establishments, saw the biggest decline. Loudoun County, which added 139 establishments, saw the biggest increase.

**Figure 3-10. Number of Private Establishments (all industries, all est. sizes), 2003-2018.**



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), 2003-2018.**

<b>Number of Private Establishments (all industries, all sizes)</b>									
Source: Quarterly Census of Employment and Wages (QCEW), Bureau of Labor Statistics, U.S. Department of Labor									
Series:	Number of Establishments in Private Total, all industries for All establishment sizes -- Statewide, NSA								
Industry:	Total, all industries								
Owner:	Private								
Size:	All establishment sizes								
Series Id:	ENU2400020510								
FIPS	Name	2003	2004	2005	2006	2007	2008	2009	2010
11000	District of Columbia	29,180	29,464	30,322	31,513	33,162	33,574	33,723	34,387
51059	Fairfax Co., VA	29,291	29,271	30,532	31,052	32,448	33,396	33,567	33,590
24031	Montgomery Co., MD	30,689	31,453	32,163	32,360	33,005	32,847	32,337	32,266
24005	Baltimore Co., MD	19,903	20,594	20,977	21,402	21,851	21,507	21,165	20,830
24033	Prince George's Co., MD	14,447	14,876	15,200	15,272	15,566	15,508	15,362	15,230
24003	Anne Arundel Co., MD	12,849	13,358	13,829	13,974	14,344	14,345	14,125	14,074
51107	Loudoun Co., VA	5,680	6,150	6,761	7,211	7,912	8,644	8,801	9,001
24027	Howard County, MD	7,566	7,888	8,111	8,305	8,543	8,641	8,655	8,682
51013	Arlington Co., VA	6,629	6,771	7,048	7,099	7,334	7,568	7,665	7,823
24021	Frederick Co., MD	5,145	5,412	5,624	5,728	5,935	5,888	5,785	5,797
24000	State of Maryland	148,573	152,972	156,958	159,792	163,763	162,591	160,752	160,241
51000	State of Virginia	193,857	198,259	206,050	209,294	219,242	222,884	221,916	222,700
FIPS	Name	2011	2012	2013	2014	2015	2016	2017	2018
11000	District of Columbia	35,417	35,584	35,010	35,871	37,619	38,491	39,565	39,325
51059	Fairfax Co., VA	33,996	34,541	34,529	34,495	36,323	37,046	36,930	37,016
24031	Montgomery Co., MD	32,590	33,120	33,309	32,593	32,501	32,599	32,679	32,680
24005	Baltimore Co., MD	20,760	20,982	21,107	20,950	20,986	21,042	21,062	21,031
24033	Prince George's Co., MD	15,210	15,230	15,364	15,285	15,318	15,582	15,669	15,803
24003	Anne Arundel Co., MD	14,144	14,288	14,444	14,330	14,699	14,845	14,966	15,005
51107	Loudoun Co., VA	9,372	9,701	9,888	10,178	11,105	11,695	11,950	12,269
24027	Howard County, MD	8,861	9,110	9,327	9,389	9,786	9,906	9,964	9,954
51013	Arlington Co., VA	8,032	8,329	8,494	8,462	9,023	9,156	9,035	9,014
24021	Frederick Co., MD	5,931	6,044	6,161	6,183	6,209	6,279	6,278	6,321
24000	State of Maryland	161,200	164,145	165,535	163,723	165,290	167,398	168,653	169,835
51000	State of Virginia	224,817	230,479	230,312	232,611	246,747	256,825	262,446	270,687

## **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.<sup>45</sup>

*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 2003-2018.

Figure 3-12 and Table 3-12 depict BEA statistics on compensation to employees in the Retail Trade sector (NAICS Code 44-45) for 2003-2018. 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 2003-2018.

*Current data and trends:*

Compared to last year, the 2018 NAICS data on employment and establishments in the Retail Trade Sector show Montgomery County had 940 fewer retail trade jobs (down 1.8 percent) and 20 fewer private establishments (down 0.8 percent.)

Across the jurisdictions, every jurisdiction except Loudoun County also saw declines in retail trade jobs and private establishments.

- **Retail jobs.** Two other Maryland jurisdictions besides Montgomery County lost more than 500 retail job. Baltimore County lost 700 jobs (down 1.3 percent) and Prince George’s County lost 677 jobs (down 1.7 percent).

Outside of Maryland, the District of Columbia lost 233 jobs (down 0.9 percent) and Arlington County lost 173 jobs (down 1.6 percent). Fairfax County and Howard County each lost fewer than 100 jobs and Loudoun County added 65 jobs.

- **Private establishments.** Declines in the number of private establishments among the jurisdictions included the loss of 49 establishments in Fairfax County (down 1.8 percent), 47 establishments in the District of Columbia (down 2.4 percent), 39 establishments in Anne Arundel County (down 2.0 percent) and 24 establishments in Baltimore County (down 0.9 percent).

Compared to last year, the 2018 NAICS data for compensation to employees in the Retail Trade Sector show Montgomery County’s compensation for employees in the retail trade industry increased \$18.5M (up 0.9 percent).

Montgomery County’s employee compensation was smaller and grew more slowly than the four other Maryland jurisdictions that reported compensation data. (There was no 2017 compensation data for Frederick County).

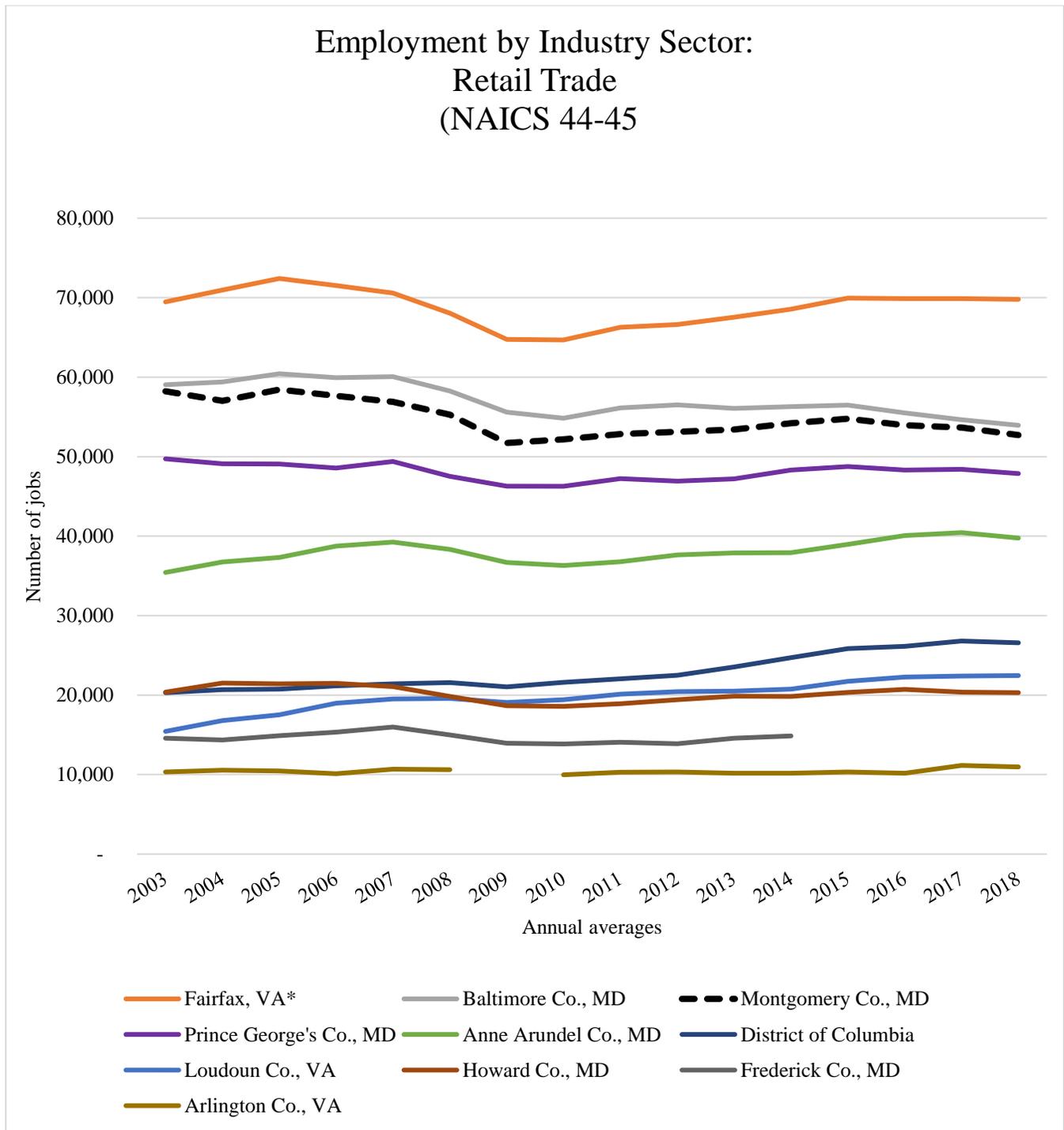
Ranked by total amount, Baltimore County’s compensation increased \$39.6M (up 2.2 percent), Anne Arundel County’s was up \$34.3M (up 2.6 percent%), Prince George’s County’s increased \$20M (up 1.2 percent) and Howard County’s grew \$13.1M (up 1.8 percent).

In Fairfax County, employee compensation for retail trade was up \$133.2M or 4.8 percent. In the District of Columbia, it increased \$44.4M or 4.4 percent.

*Source of data:*

Regional Economic Accounts, Bureau of Economic Analysis (BEA), U.S. Department of Commerce.<sup>46</sup>

**Figure 3-11. Employment by Industry Sector: Retail Trade (NAICS 44-45), 2003-2018.**



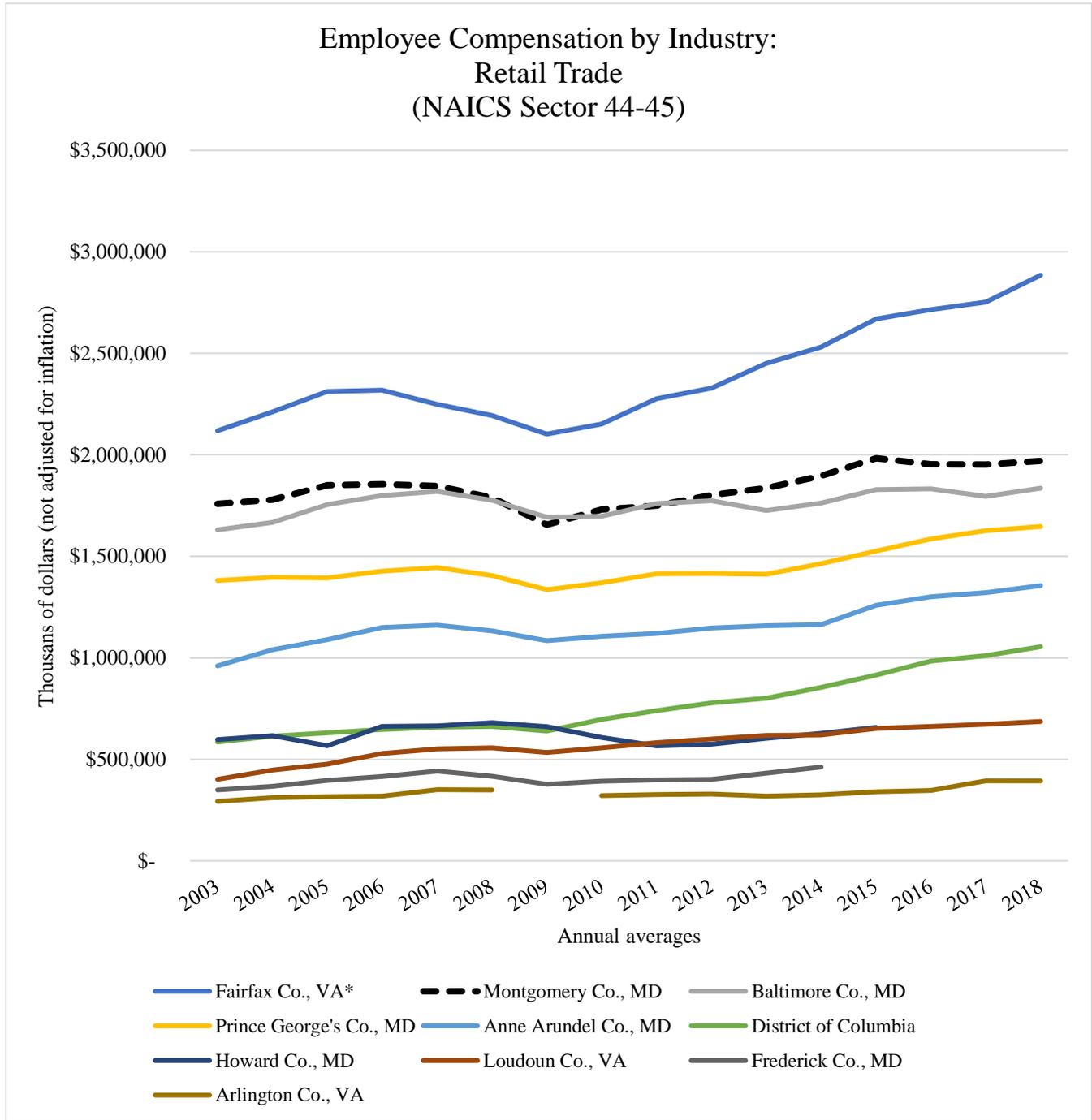
\*BEA modifies the FIPS Codes to combine Fairfax County (FIPS 51059), Fairfax City (FIPS 51600) and Falls Church (FIPS 51610) into a single FIPS Code 51919. Separate estimates for the jurisdictions making up 51919 are not available.

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), 2003-2018.**

<b>Private nonfarm employment: Retail trade (Number of jobs) NAICS Industry Sector 44-45</b>									
CAEMP25N Total Full-Time and Part-Time Employment by NAICS Industry 1/									
Source: Regional Economic Accounts, Bureau of Economic Analysis (BEA), U.S. Department of Commerce.									
FIPS	Name	2003	2004	2005	2006	2007	2008	2009	2010
51919	Fairfax, VA*	69,478	70,945	72,408	71,540	70,570	68,029	64,749	64,674
24005	Baltimore Co., MD	59,058	59,400	60,424	59,942	60,059	58,252	55,606	54,828
24031	Montgomery Co., MD	58,234	57,030	58,437	57,659	56,885	55,261	51,712	52,157
24033	Prince George's Co., MD	49,719	49,101	49,068	48,554	49,390	47,528	46,285	46,267
24003	Anne Arundel Co., MD	35,426	36,744	37,327	38,729	39,233	38,339	36,680	36,287
11000	District of Columbia	20,301	20,688	20,756	21,167	21,424	21,573	21,020	21,593
51107	Loudoun Co., VA	15,429	16,789	17,520	18,985	19,499	19,584	19,060	19,402
24027	Howard Co., MD	20,378	21,511	21,426	21,470	21,073	19,833	18,646	18,579
24021	Frederick Co., MD	14,581	14,355	14,888	15,317	15,977	14,996	13,931	13,845
51013	Arlington Co., VA	10,318	10,545	10,459	10,118	10,664	10,610	(D)	9,967
51000	Virginia	480,774	490,295	499,079	503,912	508,576	495,859	474,222	469,984
24000	Maryland	349,903	353,173	358,329	359,833	362,543	350,624	334,361	330,859
FIPS	Name	2011	2012	2013	2014	2015	2016	2017	2018
51919	Fairfax, VA*	66,255	66,605	67,521	68,554	69,949	69,881	69,878	69,788
24005	Baltimore Co., MD	56,134	56,518	56,063	56,302	56,469	55,495	54,637	53,937
24031	Montgomery Co., MD	52,830	53,114	53,418	54,211	54,768	53,930	53,656	52,716
24033	Prince George's Co., MD	47,231	46,912	47,213	48,307	48,748	48,293	48,390	47,862
24003	Anne Arundel Co., MD	36,773	37,632	37,883	37,910	38,969	40,070	40,439	39,762
11000	District of Columbia	22,059	22,494	23,545	24,710	25,845	26,132	26,800	26,567
51107	Loudoun Co., VA	20,116	20,446	20,481	20,756	21,719	22,259	22,390	22,455
24027	Howard Co., MD	18,904	19,410	19,847	19,818	20,338	20,719	20,373	20,301
24021	Frederick Co., MD	14,076	13,870	14,562	14,847	(D)	(D)	(D)	16,330
51013	Arlington Co., VA	10,302	10,338	10,154	10,176	10,340	10,171	11,146	10,973
51000	Virginia	478,681	481,663	488,364	492,920	500,367	501,513	503,371	499,888
24000	Maryland	337,724	340,102	341,932	345,019	348,697	347,368	346,845	343,025
<b>Legend / Footnotes:</b>									
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 14, 2019-- new statistics for 2018; revised statistics for 2001-2017.									

**Figure 3-12. Compensation of Employees by Industry Sector: Retail Trade (NAICS 44-45), 2003-2018.**



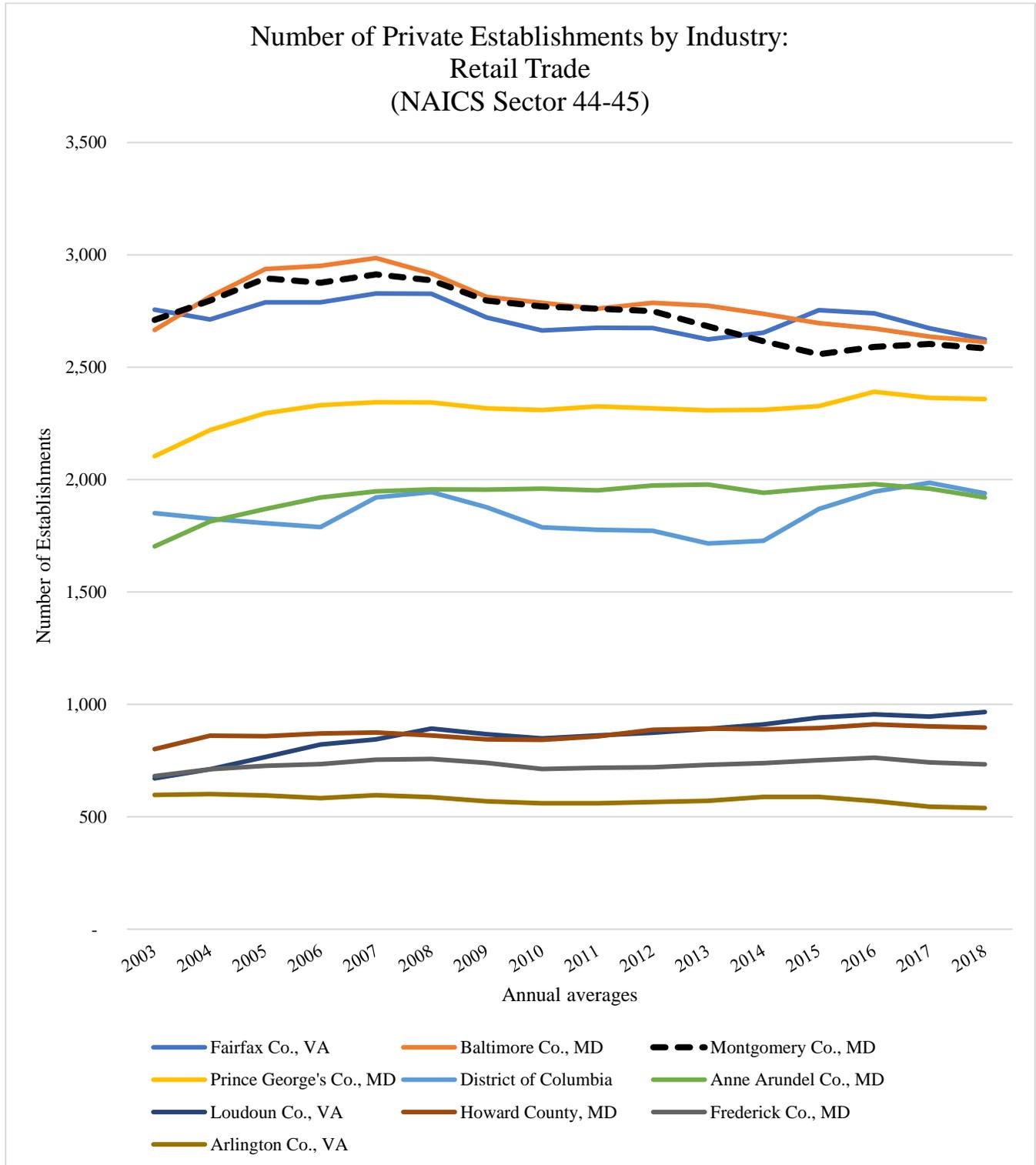
\*BEA modifies the FIPS Codes to combine Fairfax County (FIPS 51059), Fairfax City (FIPS 51600) and Falls Church (FIPS 51610) into a single FIPS Code 51919. Separate estimates for the jurisdictions making up 51919 are not available.

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), 2003-2018.**

<b>Private nonfarm compensation: Retail trade (NAICS Sector 44-45)</b>									
<b>(Thousands of dollars)</b>									
Source: Regional Economic Accounts, Bureau of Economic Analysis (BEA), U.S. Department of Commerce.									
CAINC6N Compensation of Employees by NAICS Industry									
FIPS	Name	2003	2004	2005	2006	2007	2008	2009	2010
51919	Fairfax Co., VA*	\$2,118,397	\$2,211,025	\$2,311,553	\$2,318,592	\$2,248,827	\$2,194,400	\$2,102,240	\$2,151,654
24031	Montgomery Co., MD	\$1,758,239	\$1,779,015	\$1,851,004	\$1,855,978	\$1,846,207	\$1,789,097	\$1,655,705	\$1,730,909
24005	Baltimore Co., MD	\$1,630,668	\$1,667,218	\$1,754,742	\$1,799,405	\$1,819,459	\$1,776,877	\$1,692,049	\$1,697,468
24033	Prince George's Co., MD	\$1,381,020	\$1,396,124	\$1,393,951	\$1,426,561	\$1,444,220	\$1,405,617	\$1,335,797	\$1,369,922
24003	Anne Arundel Co., MD	\$960,675	\$1,040,803	\$1,090,373	\$1,149,271	\$1,161,111	\$1,133,482	\$1,085,019	\$1,105,769
11001	District of Columbia	\$585,691	\$614,644	\$630,449	\$646,881	\$659,036	\$662,869	\$639,463	\$696,773
24027	Howard Co., MD	\$566,634	\$662,523	\$665,370	\$680,531	\$661,581	\$607,674	\$566,531	\$574,113
51107	Loudoun Co., VA	\$401,991	\$446,855	\$476,887	\$529,325	\$552,054	\$556,795	\$534,472	\$556,613
24021	Frederick Co., MD	\$349,561	\$367,742	\$396,131	\$415,586	\$442,420	\$416,475	\$377,649	\$392,819
51013	Arlington Co., VA	\$293,140	\$310,917	\$316,185	\$318,698	\$350,946	\$350,045	(D)	\$321,755
51000	Virginia	\$11,379,330	\$12,024,724	\$12,581,543	\$12,930,324	\$13,177,835	\$13,064,765	\$12,578,542	\$12,673,569
24000	Maryland	\$ 9,246,263	\$ 9,684,991	\$ 9,973,732	\$10,218,975	\$10,352,208	\$10,046,524	\$ 9,505,215	\$ 9,678,250
FIPS	Name	2011	2012	2013	2014	2015	2016	2017	2018
51919	Fairfax Co., VA*	\$2,276,467	\$2,328,161	\$2,450,316	\$2,530,883	\$2,669,650	\$2,714,811	\$2,751,630	\$2,884,825
24031	Montgomery Co., MD	\$1,749,842	\$1,802,212	\$1,836,267	\$1,896,714	\$1,982,998	\$1,953,620	\$1,951,691	\$1,970,149
24005	Baltimore Co., MD	\$1,759,900	\$1,774,505	\$1,725,784	\$1,762,843	\$1,829,078	\$1,832,009	\$1,796,108	\$1,835,693
24033	Prince George's Co., MD	\$1,414,448	\$1,414,830	\$1,411,973	\$1,464,146	\$1,525,975	\$1,586,263	\$1,626,775	\$1,646,724
24003	Anne Arundel Co., MD	\$1,120,209	\$1,147,229	\$1,158,634	\$1,163,212	\$1,259,031	\$1,300,402	\$1,321,431	\$1,355,694
11001	District of Columbia	\$740,232	\$778,204	\$801,680	\$854,511	\$916,000	\$984,271	\$1,010,582	\$1,055,016
24027	Howard Co., MD	\$603,918	\$628,627	\$657,150	\$676,644	\$719,772	\$755,061	\$739,671	\$752,806
51107	Loudoun Co., VA	\$582,621	\$600,542	\$617,347	\$620,702	\$652,679	\$662,361	\$673,077	\$686,581
24021	Frederick Co., MD	\$399,701	\$401,229	\$432,013	\$462,304	(D)	(D)	(D)	\$553,923
51013	Arlington Co., VA	\$326,062	\$328,766	\$319,437	\$325,618	\$340,756	\$347,523	\$394,365	\$394,292
51000	Virginia	\$12,922,997	\$13,230,410	\$13,693,129	\$13,983,359	\$14,552,224	\$14,638,540	\$14,935,564	\$15,291,613
24000	Maryland	\$9,943,553	\$10,112,426	\$10,201,708	\$10,480,816	\$10,972,910	\$11,143,098	\$11,154,096	\$11,385,761
*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.									
BEA Notes: All dollar estimates are in thousands of current dollars (not adjusted for inflation). Statistics presented in thousands of dollars do not indicate more precision than statistics presented in millions of dollars.									
Last updated: November 14, 2019-- new statistics for 2018; revised statistics for 2001-2017.									
(D) Not shown to avoid disclosure of confidential information; estimates are included in higher-level totals.									

**Figure 3-13. Number of Establishments by Industry: Retail Trade (NAICS 44-45), 2003-2018**



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), 2003-2018.**

Series:	<b>Number of Establishments in private Retail Trade (NAICS 44-45) for all establishment sizes.</b>								
Source:	<b>Quarterly Census of Employment and Wages (QCEW), Bureau of Labor Statistics (BLS), U.S. Department of Labor</b>								
Industry:	NAICS 44-45 Retail trade								
Owner:	Private								
Size:	All establishment sizes								
Type:	Number of Establishments								
Series Id:	ENU[FIPS]20544-45								
FIPS	Name	2003	2004	2005	2006	2007	2008	2009	2010
51059	Fairfax Co., VA	2,756	2,713	2,789	2,789	2,828	2,827	2,721	2,664
24005	Baltimore Co., MD	2,666	2,814	2,937	2,951	2,986	2,917	2,813	2,787
24031	Montgomery Co., MD	2,710	2,797	2,896	2,876	2,913	2,887	2,796	2,770
24033	Prince George's Co., MD	2,104	2,220	2,295	2,331	2,344	2,343	2,317	2,309
11000	District of Columbia	1,851	1,826	1,806	1,789	1,921	1,945	1,877	1,788
24003	Anne Arundel Co., MD	1,703	1,814	1,869	1,921	1,948	1,957	1,956	1,960
51107	Loudoun Co., VA	671	711	766	821	844	892	867	849
24027	Howard County, MD	801	861	859	871	875	862	844	842
24021	Frederick Co., MD	681	712	727	734	754	757	740	713
51013	Arlington Co., VA	597	601	595	583	596	587	569	560
24000	State of Maryland	18,059	18,797	19,284	19,467	19,661	19,523	19,148	18,928
51000	State of Virginia	26324	26413	26845	26804	27050	27110	26,403	25,928
FIPS	Name	2011	2012	2013	2014	2015	2016	2017	2018
51059	Fairfax Co., VA	2,676	2,674	2,624	2,654	2,754	2,740	2,673	2,624
24005	Baltimore Co., MD	2,760	2,787	2,774	2,738	2,696	2,672	2,636	2,612
24031	Montgomery Co., MD	2,761	2,750	2,682	2,616	2,558	2,591	2,604	2,584
24033	Prince George's Co., MD	2,326	2,317	2,308	2,311	2,327	2,391	2,364	2,359
11000	District of Columbia	1,777	1,773	1,716	1,728	1,869	1,947	1,986	1,939
24003	Anne Arundel Co., MD	1,952	1,974	1,978	1,941	1,963	1,980	1,960	1,921
51107	Loudoun Co., VA	862	874	891	911	941	956	946	966
24027	Howard County, MD	858	887	892	889	895	911	902	897
24021	Frederick Co., MD	718	720	731	739	752	763	742	733
51013	Arlington Co., VA	560	566	571	588	588	570	545	539
24000	State of Maryland	18,938	18,985	18,887	18,610	18,562	18,719	18,561	18,434
51000	State of Virginia	25,784	25,776	25,553	25,483	26,104	26,089	25,901	25,844

**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.<sup>47</sup>

*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 Tables 3-14 depict BEA statistics on employment (number of jobs) in the Accommodation and Food Services sector (NAICS Code 72) for 2003-2018.

Figure 3-15 and Tables 3-15 depict BEA statistics on compensation to employees in the Accommodation and Food Services sector (NAICS Code 72) for 2003-2018. Note that dollars are in thousands.

Figure 3-16 and Tables 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 2003-2018.

*Current data and trends:*

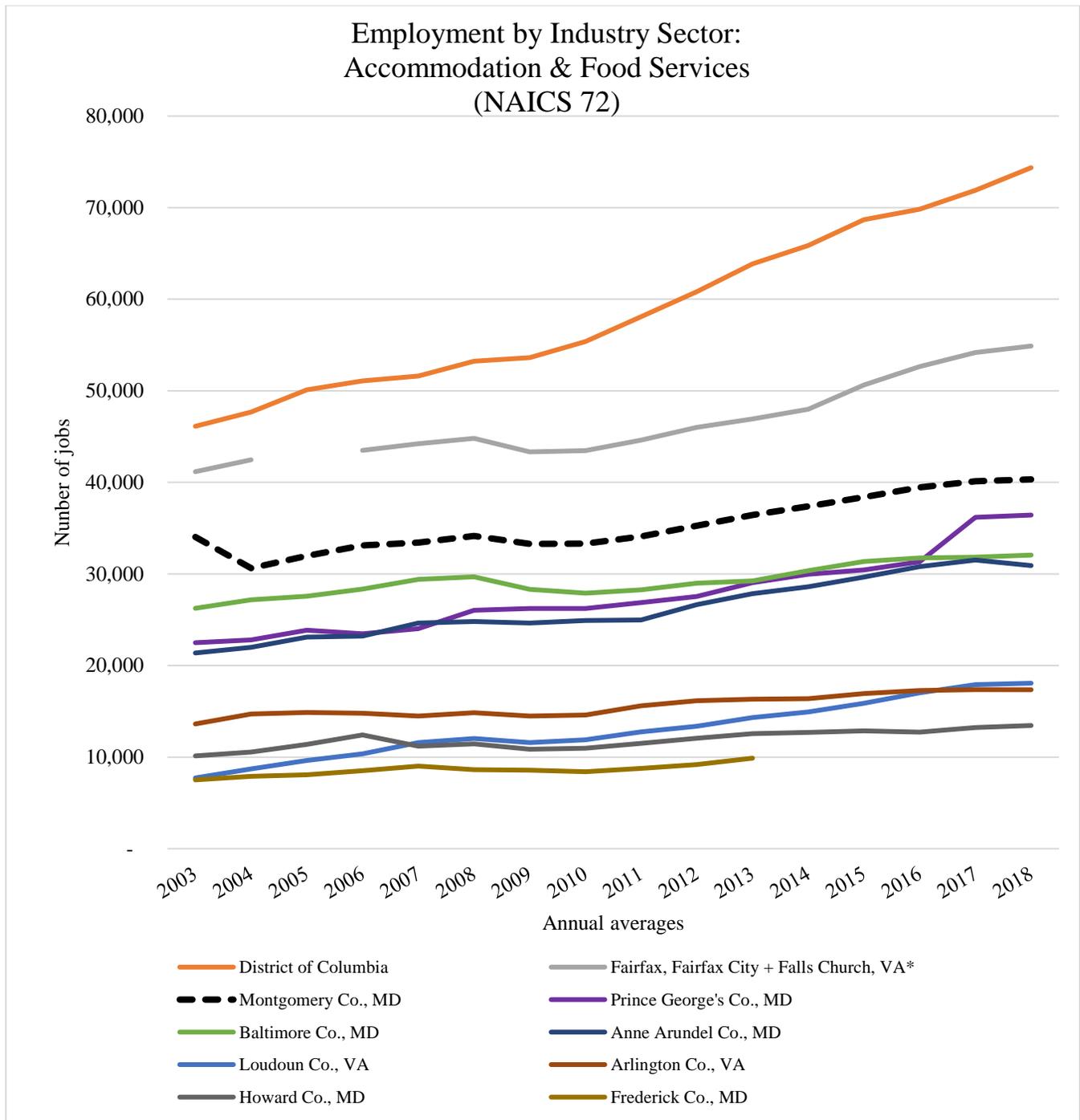
Compared to the prior year, the 2018 data show Montgomery County's Accommodation and Food Services sector added 217 jobs (up 0.5 percent) and four private establishments. The District of Columbia saw the largest increases, adding 2,462 jobs (up 3.4 percent) and 118 private establishments (up 4.7 percent). Prince George's County added 254 jobs (up 0.7 percent) and 17 establishments (up 1.2 percent). Fairfax County added 705 jobs (up 1.3 percent) and eight establishments (up 0.4 percent).

In Montgomery County, employee compensation grew by \$34.8M or 2.9 percent. Growth in Arlington County (up 2.3 percent) and Anne Arundel County (up 2.7 percent) also fell below 3.0 percent. In six jurisdictions total compensation increases exceeded 3.0 percent, including an increase of \$205.3M (up 7.1 percent) in the District of Columbia and an increase of \$80.4M (up 5.1 percent) in Fairfax County.

*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.<sup>48</sup> 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.<sup>49</sup> 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), 2003-2018.**



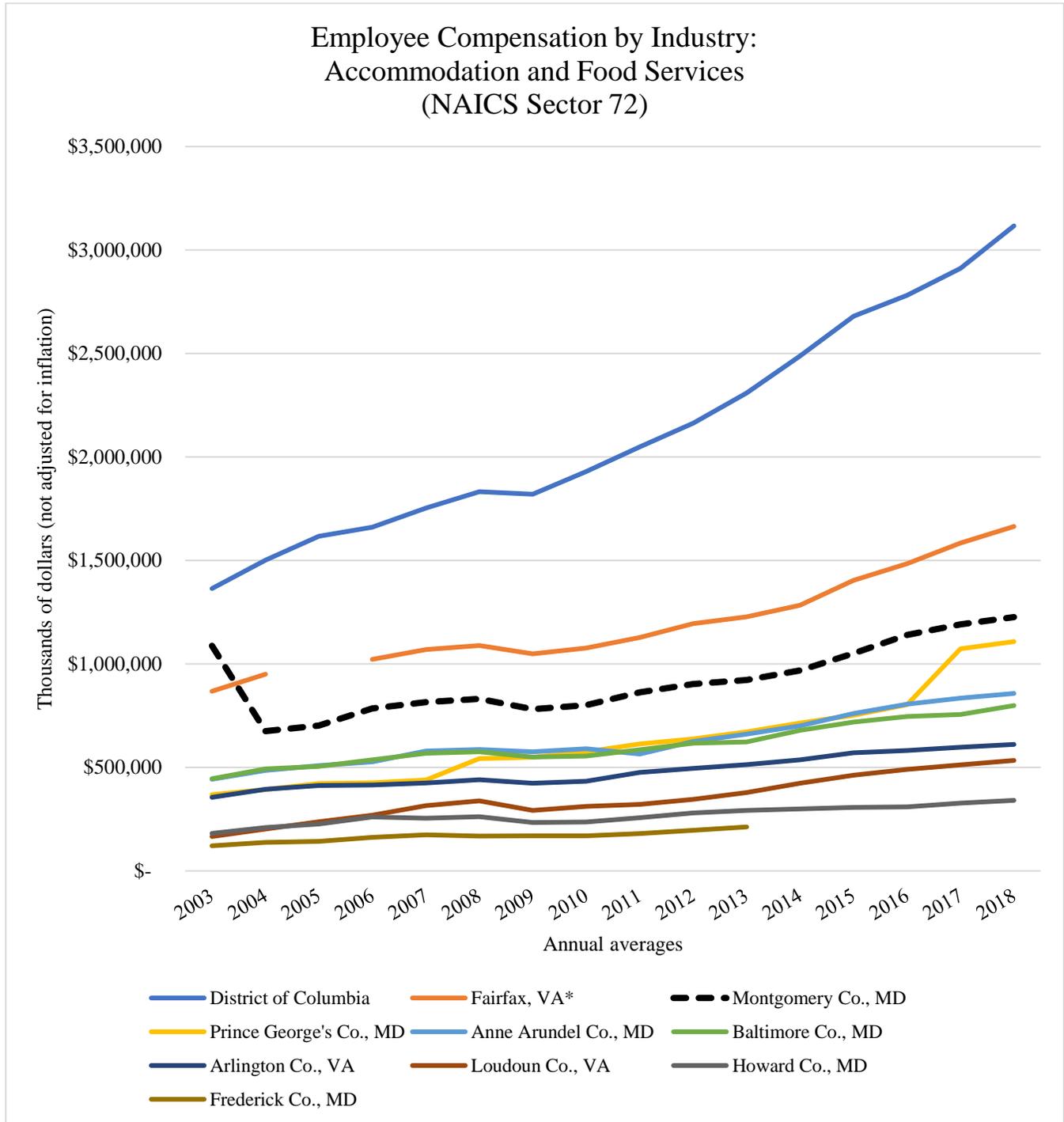
\*BEA modifies the FIPS Codes to combine Fairfax County (FIPS 51059), Fairfax City (FIPS 51600) and Falls Church (FIPS 51610) into a single FIPS Code 51919. Separate estimates for the jurisdictions making up 51919 are not available.

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), 2003-2018.**

<b>Private nonfarm employment: Accommodation &amp; Food Services (Number of jobs) in NAICS 72</b>									
CAEMP25N Total Full-Time and Part-Time Employment by NAICS Industry 1/									
Source: Bureau of Economic Analysis, U.S. Department of Commerce									
FIPS	Name	2003	2004	2005	2006	2007	2008	2009	2010
11001	District of Columbia, DC	46,125	47,671	50,101	51,094	51,609	53,218	53,607	55,375
51919	Fairfax Co., VA*	41,165	42,474	(D)	43,498	44,211	44,807	43,313	43,456
24031	Montgomery, MD	34,027	30,632	31,977	33,131	33,411	34,136	33,291	33,303
24033	Prince George's, MD	22,492	22,805	23,869	23,463	24,033	26,041	26,234	26,233
24005	Baltimore, MD	26,249	27,165	27,565	28,349	29,396	29,680	28,317	27,905
24003	Anne Arundel, MD	21,373	22,001	23,113	23,224	24,644	24,803	24,633	24,913
51107	Loudoun, VA	7,729	8,720	9,641	10,343	11,586	12,019	11,574	11,885
51013	Arlington, VA	13,623	14,706	14,872	14,790	14,494	14,839	14,498	14,592
24027	Howard, MD	10,133	10,541	11,375	12,417	11,201	11,440	10,848	10,972
24021	Frederick, MD	7,514	7,900	8,059	8,506	9,019	8,614	8,562	8,396
51000	Virginia	282,472	293,508	301,958	311,341	317,527	320,770	313,871	313,576
24000	Maryland	198,116	198,399	204,281	208,627	212,654	215,136	210,368	209,486
FIPS	Name	2011	2012	2013	2014	2015	2016	2017	2018
11001	District of Columbia, DC	58,094	60,823	63,849	65,860	68,677	69,824	71,897	74,359
51919	Fairfax Co., VA*	44,608	46,001	46,933	47,988	50,637	52,635	54,179	54,884
24031	Montgomery, MD	34,106	35,275	36,440	37,387	38,376	39,455	40,106	40,323
24033	Prince George's, MD	26,875	27,540	29,035	29,966	30,440	31,321	36,176	36,430
24005	Baltimore, MD	28,265	28,982	29,239	30,356	31,347	31,740	31,839	32,061
24003	Anne Arundel, MD	24,960	26,645	27,859	28,600	29,646	30,790	31,520	30,909
51107	Loudoun, VA	12,762	13,382	14,327	14,923	15,886	17,015	17,918	18,071
51013	Arlington, VA	15,605	16,145	16,319	16,384	16,944	17,283	17,366	17,362
24027	Howard, MD	11,503	12,063	12,560	12,700	12,878	12,722	13,226	13,450
24021	Frederick, MD	8,762	9,188	9,882	(D)	(D)	(D)	(D)	11,647
51000	Virginia	322,396	329,873	336,965	344,219	355,765	367,764	376,396	380,982
24000	Maryland	214,167	222,362	229,814	235,156	241,466	246,651	255,759	257,449
<b>Legend / Footnotes:</b>									
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.									
*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.									
(D) Not shown to avoid disclosure of confidential information; estimates are included in higher-level totals.									
Last updated: November 14, 2019-- new statistics for 2018; revised statistics for 2001-2017.									

**Figure 3-15. Compensation of Employees by Industry: Accommodation & Food Services, 2003-2018**



\*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), 2003-2018.**

<b>Private nonfarm compensation: Accommodation &amp; Food Services (NAICS Sector 72)</b>									
<b>(Thousands of dollars)</b>									
Data Source: Regional Economic Accounts, Bureau of Economic Analysis (BEA), U.S. Department of Commerce.									
CAINC6N Compensation of Employees by NAICS Industry									
FIPS	Name	2003	2004	2005	2006	2007	2008	2009	2010
11001	District of Columbia	\$1,364,194	\$1,501,580	\$1,616,662	\$1,661,304	\$1,753,170	\$1,832,169	\$1,820,253	\$1,929,956
51919	Fairfax, VA*	\$868,108	\$950,226	(D)	\$1,021,891	\$1,069,142	\$1,088,936	\$1,048,828	\$1,076,396
24031	Montgomery Co., MD	\$1,088,402	\$675,216	\$701,620	\$785,489	\$815,092	\$830,661	\$781,297	\$800,269
24033	Prince George's Co., MD	\$368,530	\$393,718	\$422,252	\$426,186	\$440,014	\$543,068	\$548,555	\$575,504
24003	Anne Arundel Co., MD	\$443,026	\$485,936	\$509,048	\$526,676	\$578,925	\$586,957	\$575,929	\$590,065
24005	Baltimore Co., MD	\$445,453	\$492,579	\$505,553	\$536,659	\$567,931	\$576,231	\$550,512	\$554,524
51013	Arlington Co., VA	\$355,560	\$394,470	\$412,970	\$415,187	\$425,439	\$440,669	\$423,290	\$433,834
51107	Loudoun Co., VA	\$166,187	\$202,365	\$238,090	\$268,913	\$314,996	\$338,947	\$292,494	\$312,316
24027	Howard Co., MD	\$181,201	\$209,516	\$226,154	\$260,146	\$254,591	\$261,308	\$233,657	\$236,149
24021	Frederick Co., MD	\$121,272	\$137,505	\$142,049	\$162,056	\$174,481	\$168,564	\$169,191	\$169,089
24000	Maryland	\$3,948,034	\$3,792,190	\$3,963,421	\$4,213,944	\$4,432,888	\$4,570,513	\$4,443,612	\$4,523,362
51000	Virginia	\$4,846,051	\$5,311,762	\$5,572,548	\$5,840,958	\$6,173,265	\$6,328,314	\$6,166,860	\$6,277,085
FIPS	Name	2011	2012	2013	2014	2015	2016	2017	2018
11001	District of Columbia	\$2,049,288	\$2,162,907	\$2,309,266	\$2,488,288	\$2,680,114	\$2,780,668	\$2,911,342	\$3,116,637
51919	Fairfax, VA*	\$1,127,384	\$1,194,381	\$1,227,904	\$1,283,551	\$1,404,655	\$1,484,177	\$1,583,781	\$1,664,151
24031	Montgomery Co., MD	\$862,706	\$902,386	\$922,367	\$968,462	\$1,051,571	\$1,139,876	\$1,191,520	\$1,226,341
24033	Prince George's Co., MD	\$613,499	\$637,833	\$672,360	\$714,353	\$752,175	\$803,468	\$1,073,613	\$1,108,072
24003	Anne Arundel Co., MD	\$564,196	\$625,887	\$660,800	\$700,508	\$761,001	\$805,006	\$834,873	\$857,414
24005	Baltimore Co., MD	\$585,682	\$617,143	\$623,409	\$679,276	\$719,672	\$746,586	\$756,021	\$798,921
51013	Arlington Co., VA	\$476,229	\$495,234	\$513,302	\$536,256	\$570,323	\$582,159	\$597,302	\$611,148
51107	Loudoun Co., VA	\$321,806	\$346,298	\$378,559	\$423,070	\$462,189	\$490,059	\$512,713	\$533,840
24027	Howard Co., MD	\$256,849	\$279,897	\$292,225	\$300,089	\$306,805	\$308,715	\$327,199	\$340,898
24021	Frederick Co., MD	\$180,937	\$196,462	\$212,406	(D)	(D)	(D)	(D)	\$283,449
24000	Maryland	\$4,734,657	\$5,089,503	\$5,268,851	\$5,556,706	\$5,931,020	\$6,240,938	\$6,703,168	\$6,976,025
51000	Virginia	\$6,548,678	\$6,973,777	\$7,202,219	\$7,579,466	\$8,128,497	\$8,497,559	\$8,844,374	\$9,204,917

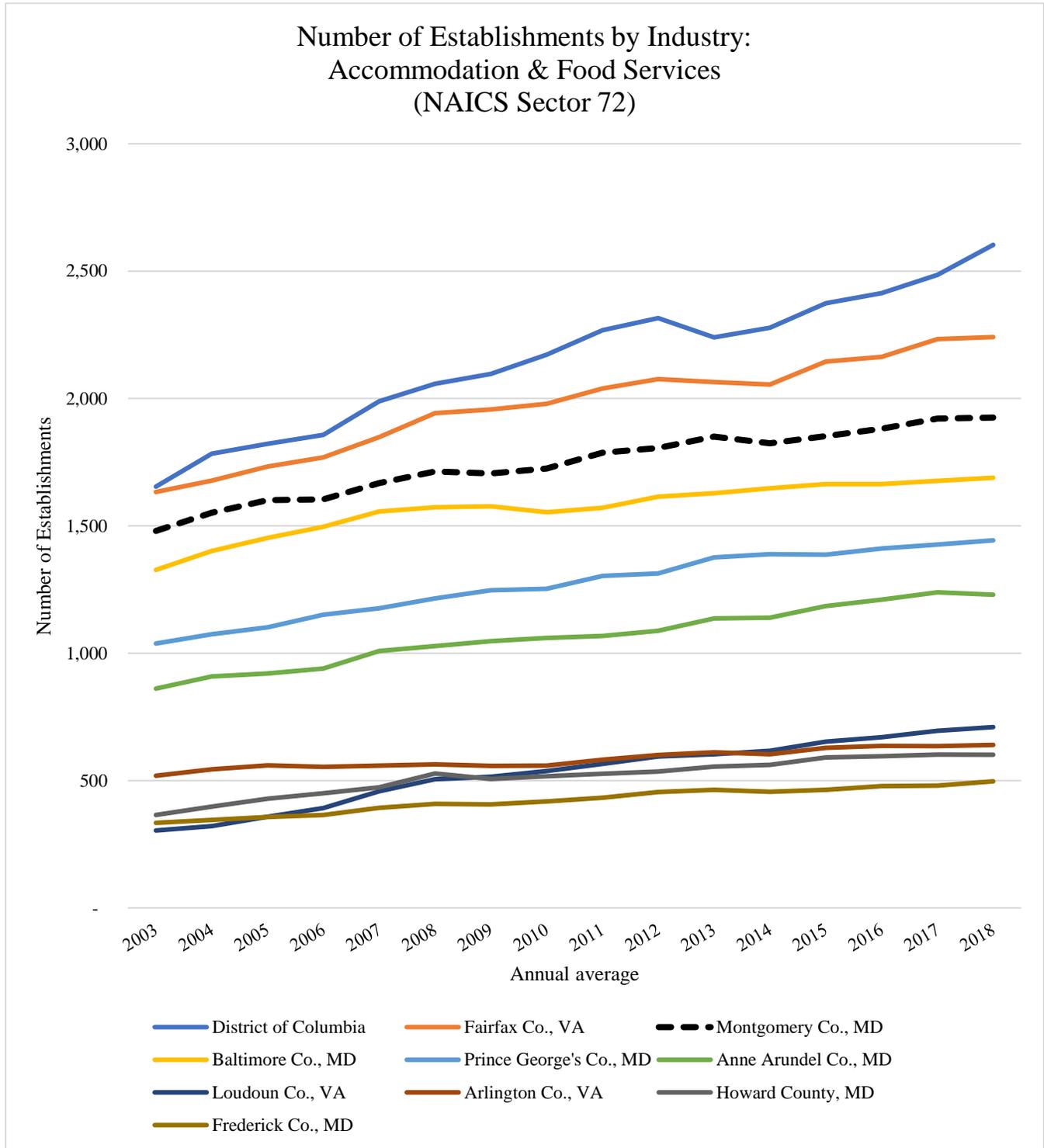
(D) Not shown to avoid disclosure of confidential information; estimates are included in higher-level totals.

\*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.

Note-- All dollar estimates are in thousands of current dollars (not adjusted for inflation). Statistics presented in thousands of dollars do not indicate more precision than statistics presented in millions of dollars.

Last updated: November 14, 2019-- new statistics for 2018; revised statistics for 2001-2017.

**Figure 3-16. Number of Establishments by Industry: Accommodation and Food Services (NAICS 72), 2003-2018.**



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), 2001-2018**

<b>Series: Number of Establishments in private Accommodation &amp; Food Services (NAICS 72) for all establishment sizes</b>									
Series Id:	ENU[FIPS]20572								
Industry:	NAICS 72 Accommodation and food services								
Owner:	Private								
Size:	All establishment sizes								
Type:	Number of Establishments								
Source:	Quarterly Census of Employment and Wages (QCEW), Bureau of Labor Statistics (BLS), U.S. Department of Labor.								
FIPS	Name	2003	2004	2005	2006	2007	2008	2009	2010
11000	District of Columbia	1,654	1,783	1,822	1,857	1,989	2,058	2,096	2,172
51059	Fairfax Co., VA	1,633	1,678	1,733	1,769	1,848	1,942	1,957	1,979
24031	Montgomery Co., MD	1,480	1,552	1,601	1,604	1,668	1,713	1,706	1,725
24005	Baltimore Co., MD	1,327	1,401	1,453	1,496	1,556	1,573	1,577	1,553
24033	Prince George's Co., MD	1,038	1,075	1,102	1,151	1,176	1,215	1,247	1,253
24003	Anne Arundel Co., MD	861	909	920	940	1,009	1,028	1,047	1,060
51107	Loudoun Co., VA	304	321	358	392	458	505	515	537
51013	Arlington Co., VA	519	544	560	554	559	564	558	559
24027	Howard County, MD	365	398	429	450	473	528	506	517
24021	Frederick Co., MD	334	345	357	365	393	408	407	418
24000	State of Maryland	9,503	9,827	10,115	10,376	10,820	11,025	11,079	11,150
51000	State of Virginia	12,914	13,386	13,887	14,210	14,776	15,404	15,324	15,357
FIPS	Name	2011	2012	2013	2014	2015	2016	2017	2018
11000	District of Columbia	2,268	2,316	2,240	2,278	2,374	2,413	2,485	2,603
51059	Fairfax Co., VA	2,039	2,076	2,064	2,055	2,145	2,163	2,233	2,241
24031	Montgomery Co., MD	1,787	1,806	1,850	1,824	1,852	1,881	1,921	1,925
24005	Baltimore Co., MD	1,571	1,615	1,628	1,648	1,664	1,664	1,677	1,689
24033	Prince George's Co., MD	1,303	1,313	1,376	1,389	1,387	1,411	1,426	1,443
24003	Anne Arundel Co., MD	1,068	1,088	1,137	1,139	1,185	1,210	1,239	1,230
51107	Loudoun Co., VA	566	595	603	617	653	670	695	710
51013	Arlington Co., VA	582	600	611	603	629	636	635	640
24027	Howard County, MD	527	535	555	562	591	596	602	601
24021	Frederick Co., MD	433	455	464	456	464	478	480	497
24000	State of Maryland	11,389	11,623	11,863	11,777	11,945	12,104	12,268	12,298
51000	State of Virginia	15,713	16,029	15,939	16,001	16,691	16,965	17,277	17,378

## **Economic Indicator #17: 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<sup>50</sup>:

- 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.** As of May 2017, BLS' OES program data showed that 25 percent of workers in Food Preparation and Serving-Related Occupations in the Silver Spring-Frederick-Rockville, Maryland Metropolitan Division (FIPS 43524) were paid less than \$9.50 per hour.<sup>2</sup> 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 Shop; 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.** As of May 2017, BLS' OES program data showed that 25 percent of workers in Buildings and Grounds Cleaning and Maintenance Occupations in the Silver Spring-Frederick-Rockville, Maryland Metropolitan Division (FIPS 43524) were paid less than \$10.75 per hour. 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.** As of May 2017, BLS' OES program data showed that 25 percent of workers in Personal Care and Service Occupations in the Silver Spring-Frederick-Rockville, Maryland Metropolitan Division (FIPS 43524) were paid less than \$9.75 per hour. 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;

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<sup>2</sup>

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:*

- Occupational Employment Statistics (OES) Survey Data, Bureau of Labor Statistics (BLS), U.S. Department of Labor.  
*Technical note:* Because BLS' OES data for 2017 showed that within the Silver Spring-Frederick-Rockville, Maryland Metropolitan Division a relatively large percentage of the occupations in three major occupational groups (SOC codes 35-0000, 37-0000, and 39-0000) earned less than the County minimum wage, OLO focused on these occupational groups to report employment and wage estimates from DLLR. However, BLS no longer reports OES data in this geographic detail. Because the OES sample has been reduced, the level of detail available has been reduced. In March 2019, BLS announced that it will only publish OES program data for the larger Washington-Arlington-Alexandria, DC-VA-MD-WV metropolitan region. As a result, OLO may need to revise this indicator in future years.
- Maryland Occupational Wages Estimates for Workforce Regions (May 2017 and May 2018), 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 numbers of jobs, both full-time and part-time. Occupations covered reflect the Standard Occupational Classification (SOC) System.

Regarding the Workforce Region OES estimates, DLLR has provided several extensions to the official OES data series (which were developed in cooperation with BLS). These additional products have not been validated by BLS and are not, therefore, official BLS data series. DLLR feels, however, that they provide additional information that is useful to the users of DLLR statistics.<sup>51</sup>

*Current data:*

Table 3-17 shows DLLR data by workforce region as of May 2018 for the three major occupational groups. Table 3-18 shows that DLLR data as of May 2017 and Table 3-19 compares the 2018 data to the 2017 data. Of note,

- For **Food Preparation and Serving Related Occupations**, three workforce regions (Montgomery County, Baltimore County and Frederick County) saw declines in total jobs and increases in entry hourly wages.
  - In terms of jobs, Baltimore County saw the steepest decline with a loss of 3,910 jobs (down 13.1 percent) followed by Montgomery County with a loss of 3,890 jobs (down 12.2 percent) and Frederick with a loss of 1,050 jobs (down 7.6 percent).
  - In terms of wages, entry hourly wages were up 39 cents (4.2 percent) in Baltimore County, 74 cents (7.8 percent) in Montgomery County and 54 cents (5.9 percent) in Frederick County.
- Two jurisdictions saw increases in total jobs and in entry hourly wages for **Food Preparation Occupations**. Prince George’s County added 3,820 jobs (up 14.5 percent) and its entry hourly wage increased 70 cents (7.3 percent). Anne Arundel County added 2,270 jobs (up 6.2 percent) and its entry hourly wage rose 39 cents (up 4.3 percent).
- For **Buildings and Grounds and Cleaning and Maintenance Occupations**, two regions (Montgomery County and Baltimore County) saw increases in jobs and in entry hourly wages, while three workforce regions saw declines in total jobs and increases in entry hourly wages.
  - Montgomery County’s 810 new jobs (up 4.5 percent) and its hourly wage increase of 67 cents (up 6.5 percent) outpaced Baltimore County’s growth which saw 420 new jobs (up 3.1 percent) and an hourly wage increase of 50 cents (up 5.2 percent).
  - Among the regions with job declines and wage increases, Prince George’s saw the steepest job declines, losing 1,560 jobs (down 13.9 percent) followed by Frederick which lost 230 jobs (down 5.1 percent) and Anne Arundel which lost 130 jobs (down 1.6 percent).
  - Wage growth was highest in Frederick which saw an hourly increase of 93 cents (up 9.1 percent) followed by Prince George’s increase of 61 cents (up 5.9 percent) and Anne Arundel’s increase of 55 cents (up 5.4 percent).
- For the **Personal Care and Service Occupations**, all five workforce regions saw increases in total jobs and in entry hourly wages.
  - Montgomery County’s 670 new jobs (up 4.3 percent) trailed Prince George’s gain of 1,250 jobs (up 11.9 percent), Anne Arundel’s gain of 540 jobs (up 6.9 percent) and Baltimore County’s gain of 910 jobs (6.8 percent).
  - Montgomery County’s hourly wage increase of 87 cents (up 9.0 percent) exceeded gains elsewhere, including Frederick County’s gain of 67 cents (up 7.1 percent), Baltimore County’s increase of 45 cents (up 4.6 percent), Anne Arundel County’s increase of 38 cents (up 4.1 percent) and Prince George’s County (up 3.4 percent).

**Table 3-17. Maryland Employment and Wage Estimates by Major Occupational Group, May 2018.**

<b>Employment and Wage Estimates by Major Occupational Group</b>					
Source: Maryland Department of Labor, Licensing and Regulation (DLLR)					
Occupational Employment Statistics Program					
Standard Occupational Classification (SOC) Codes: 35-0000, 37-0000, 39-0000.					
(Estimates as of May 2018; updated April 2019; retrieved December 2019)					
Major Occupational Group	Workforce Region				
	Montgomery	Prince George's	Baltimore County	Anne Arundel	Frederick
<b>Food Preparation and Serving-Related Occupations (SOC 35-0000)</b>					
Estimated employment	28,710	30,150	26,030	38,840	12,720
Entry wage - hourly	\$10.19	\$10.35	\$9.66	\$9.54	\$9.77
Entry wage - annual	\$21,193	\$21,525	\$20,089	\$19,833	\$20,324
Mean wage - hourly	\$13.80	\$13.45	\$12.06	\$12.09	\$12.90
Mean wage - annual	\$28,707	\$27,984	\$25,093	\$25,137	\$26,823
Median wage - hourly	\$11.86	\$11.73	\$10.76	\$10.37	\$11.68
Median wage - annual	\$24,676	\$24,404	\$22,371	\$21,578	\$24,289
<b>Buildings and Grounds Cleaning and Maintenance Occupations (SOC 37-0000)</b>					
Estimated employment	18,830	9,650	13,860	7,950	4,310
Entry wage - hourly	\$11.02	\$10.92	\$10.20	\$10.79	\$11.16
Entry wage - annual	\$22,912	\$22,712	\$21,219	\$22,450	\$23,220
Mean wage - hourly	\$15.16	\$16.31	\$14.15	\$15.29	\$15.10
Mean wage - annual	\$31,530	\$33,917	\$29,432	\$31,807	\$31,398
Median wage - hourly	\$13.81	\$14.13	\$12.63	\$14.07	\$13.81
Median wage - annual	\$28,715	\$29,380	\$26,261	\$29,258	\$28,734
<b>Personal Care and Service Occupations (SOC 39-0000)</b>					
Estimated employment	16,190	11,780	14,220	8,310	4,160
Entry wage - hourly	\$10.59	\$9.47	\$10.23	\$9.69	\$10.13
Entry wage - annual	\$22,025	\$19,702	\$21,289	\$20,165	\$21,080
Mean wage - hourly	\$15.17	\$13.16	\$15.24	\$14.50	\$16.31
Mean wage - annual	\$31,546	\$27,370	\$31,700	\$30,166	\$33,933
Median wage - hourly	\$12.89	\$9.77	\$12.51	\$11.94	\$11.89
Median wage - annual	\$26,819	\$20,332	\$26,027	\$24,833	\$24,736

**Table 3-18. Maryland Employment and Wage Estimates by Major Occupational Group, May 2017.**

<b>Employment and Wage Estimates by Major Occupational Group</b>					
Source: Maryland Department of Labor, Licensing and Regulation (DLLR)					
Occupational Employment Statistics Program					
Standard Occupational Classification (SOC) Codes: 35-0000, 37-0000, 39-0000.					
(Estimates as of May 2017; updated April 2018; retrieved January 2019)					
Major Occupational Group	Workforce Region				
	Montgomery	Prince George's	Baltimore County	Anne Arundel	Frederick
<b>Food Preparation and Serving-Related Occupations (SOC 35-0000)</b>					
Estimated employment	32,600	26,330	29,940	36,570	13,770
Entry wage - hourly	\$9.45	\$9.65	\$9.27	\$9.15	\$9.23
Entry wage - annual	\$19,666	\$20,076	\$19,289	\$19,041	\$19,192
Mean wage - hourly	\$13.19	\$13.52	\$11.93	\$11.77	\$12.12
Mean wage - annual	\$27,446	\$28,114	\$24,821	\$24,482	\$25,219
Median wage - hourly	\$11.14	\$11.15	\$10.20	\$9.83	\$10.62
Median wage - annual	\$23,180	\$23,188	\$21,223	\$20,452	\$22,080
<b>Buildings and Grounds Cleaning and Maintenance Occupations (SOC 37-0000)</b>					
Estimated employment	18,020	11,210	13,440	8,080	4,540
Entry wage - hourly	\$10.35	\$10.31	\$9.70	\$10.24	\$10.23
Entry wage - annual	\$21,521	\$21,437	\$20,173	\$21,306	\$21,272
Mean wage - hourly	\$14.44	\$16.04	\$13.70	\$14.88	\$14.43
Mean wage - annual	\$30,038	\$33,354	\$28,498	\$30,944	\$30,018
Median wage - hourly	\$12.84	\$13.69	\$12.46	\$13.40	\$13.31
Median wage - annual	\$26,699	\$28,471	\$25,992	\$27,876	\$27,684
<b>Personal Care and Service Occupations (SOC 39-0000)</b>					
Estimated employment	15,520	10,530	13,310	7,770	4,030
Entry wage - hourly	\$9.72	\$9.16	\$9.78	\$9.31	\$9.46
Entry wage - annual	\$20,226	\$19,051	\$20,338	\$19,358	\$19,685
Mean wage - hourly	\$15.33	\$12.55	\$14.94	\$14.07	\$15.35
Mean wage - annual	\$31,889	\$26,098	\$31,070	\$29,259	\$31,924
Median wage - hourly	\$12.34	\$9.90	\$12.62	\$11.75	\$11.53
Median wage - annual	\$25,658	\$20,600	\$26,260	\$24,443	\$23,983

**Table 3-19. Maryland Employment and Wage Estimates by Major Occupational Group, Changes from May 2017 to 2018**

<b>Employment and Wage Estimates by Major Occupational Group</b>					
Source: Maryland Department of Labor, Licensing and Regulation (DLLR)					
Occupational Employment Statistics Program					
Standard Occupational Classification (SOC) Codes: 35-0000, 37-0000, 39-0000.					
(Estimates as of May 2018; updated April 2019; retrieved December 2019)					
Major Occupational Group	Workforce Region				
	Montgomery	Prince George's	Baltimore County	Anne Arundel	Frederick
<b>Food Preparation and Serving-Related Occupations (SOC 35-0000)</b>					
Estimated employment	-3,890	+3,820	-3,910	+2,270	-1,050
Entry wage - hourly	+\$0.74	+\$0.70	+\$0.39	+\$0.39	+\$0.54
Entry wage - annual	+\$1,527	+\$1,449	+\$800	+\$792	+\$1,132
Mean wage - hourly	+\$0.61	-\$0.07	+\$0.13	+\$0.32	+\$0.78
Mean wage - annual	+\$1,261	-\$130	+\$272	+\$655	+\$1,604
Median wage - hourly	+\$0.72	+\$0.58	+\$0.56	+\$0.54	+\$1.06
Median wage - annual	+\$1,496	+\$1,216	+\$1,148	+\$1,126	+\$2,209
<b>Buildings and Grounds Cleaning and Maintenance Occupations (SOC 37-0000)</b>					
Estimated employment	+810	-1,560	+420	-130	-230
Entry wage - hourly	+\$0.67	+\$0.61	+\$0.50	+\$0.55	+\$0.93
Entry wage - annual	+\$1,391	+\$1,275	+\$1,046	+\$1,144	+\$1,948
Mean wage - hourly	+\$0.72	+\$0.27	+\$0.45	+\$0.41	+\$0.67
Mean wage - annual	+\$1,492	+\$563	+\$934	+\$863	+\$1,380
Median wage - hourly	+\$0.97	+\$0.44	+\$0.17	+\$0.67	+\$0.5
Median wage - annual	+\$2,016	+\$909	+\$269	+\$1,382	+\$1,050
<b>Personal Care and Service Occupations (SOC 39-0000)</b>					
Estimated employment	+670	+1,250	+910	+540	+130
Entry wage - hourly	+\$0.87	+\$0.31	+\$0.45	+\$0.38	+\$0.67
Entry wage - annual	+\$1,799	+\$651	+\$951	+\$807	+\$1,395
Mean wage - hourly	-\$0.16	+\$0.61	+\$0.30	+\$0.43	+\$0.96
Mean wage - annual	-\$343	+\$1,272	+\$630	+\$907	+\$2,009
Median wage - hourly	+\$0.55	-\$0.13	-\$0.11	+\$0.19	+\$0.36
Median wage - annual	+\$1,161	-\$268	-\$233	+\$390	+\$753

## 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 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 unemployment insurance (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.

**Business Dynamics Statistics (BDS):** BDS provides annual measures of business dynamics (such as job creation and destruction, establishment births and deaths, and firm startups and shutdowns) for the economy and aggregated by establishment and firm characteristics. The BDS series provides annual statistics for 1977–2016 for the nation, states, and Metro/Non-metro and MSA.

**Business Employment Dynamics (BED):** BED is a set of statistics generated from the Quarterly Census of Employment and Wages (QCEW) program. BED measures the net change in employment at the establishment level. These quarterly data series consist of statistics from 1992 forward. These data help to provide a picture of the dynamic state of the labor market.

**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.<sup>52</sup> *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.<sup>53</sup>

**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.<sup>54</sup>

**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).<sup>55</sup> In 2016, for establishments with one or more paid employees in Montgomery County, NAICS Sector 44-45 (Retail trade) and NAICS Sector 72 (Accommodation and food services) had relatively low average payroll per employee.<sup>56</sup>

**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 (FPTSs) 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.”<sup>57</sup>

**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, metropolitan statistical area, and county levels. Data have broad economic significance for the evaluation of labor market trends and major industry developments, for time-series analyses, and for interindustry comparisons.<sup>58</sup> 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.<sup>59</sup>

**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.<sup>60</sup> 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.<sup>61</sup>

**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.<sup>62</sup>

**Core based statistical areas (CBSAs)<sup>63</sup>:** 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.<sup>64</sup> Subdivisions of CBSAs include Metropolitan Statistical Areas, Micropolitan Statistical Areas, and Metropolitan Divisions.<sup>65</sup>

**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.*<sup>66</sup> 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

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<sup>1</sup> 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/ccllms/bill\\_details.aspx?doc=1454&hl=3360](https://apps.montgomerycountymd.gov/ccllms/bill_details.aspx?doc=1454&hl=3360)

<sup>2</sup> 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/ccllms/bill\\_details.aspx?doc=1454&hl=3360](https://apps.montgomerycountymd.gov/ccllms/bill_details.aspx?doc=1454&hl=3360)

<sup>3</sup> Montgomery County Code Sec. 27-70A. Annual impact analysis; retrieved from [http://library.amlegal.com/nxt/gateway.dll/Maryland/montgom/partiilocallawsordinancesresolutionsetc/chapter27humanrightsandcivilliberties?f=templates\\$fn=default.htm\\$3.0\\$vid=amlegal:montgomeryco\\_md\\_mc\\$anc=JD\\_27-70A](http://library.amlegal.com/nxt/gateway.dll/Maryland/montgom/partiilocallawsordinancesresolutionsetc/chapter27humanrightsandcivilliberties?f=templates$fn=default.htm$3.0$vid=amlegal:montgomeryco_md_mc$anc=JD_27-70A).

<sup>4</sup> *Economic Indicators for Montgomery County and Surrounding Jurisdictions*, OLO Report 2019-1 (January 15, 2019).

<sup>5</sup> 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](http://www.bea.gov/help/faq/104).

<sup>6</sup> Bureau of Economic Analysis Data Availability retrieved from <https://apps.bea.gov/regional/docs/DataAvailability.cfm>.

<sup>7</sup> Occupational Employment Statistics: May 2018 Occupational Employment and Wage Estimates for the Silver Spring-Frederick-Rockville, MD Metropolitan Division, retrieved from [XXX].

<sup>8</sup> *The Federal Minimum Wage: In Brief*, by D.H. Bradley, Specialist in Labor Economics, Congressional Research Service, June 2, 2017 (R43089); retrieved from [www.crs.gov](http://www.crs.gov).

<sup>9</sup> *The Federal Minimum Wage: In Brief*, by D.H. Bradley, Specialist in Labor Economics, Congressional Research Service, June 2, 2017 (R43089) p. 6; retrieved from [www.crs.gov](http://www.crs.gov).

<sup>10</sup> *State Minimum Wages: 2018 Minimum Wage by State (as of July 1, 2018)*, National Conference of State Legislatures (contact: Jackson Brainerd); retrieved from [www.ncsl.org/research/labor-and-employment/state-minimum-wage-chart.aspx#Table](http://www.ncsl.org/research/labor-and-employment/state-minimum-wage-chart.aspx#Table).

<sup>11</sup> Labor and Employment Article, Title 3, Subtitle 4, Annotated Code of Maryland. For a more detailed discussion of the 2019 change to the Maryland minimum wage rate, see: *The 90 Day Report: A Review of the 2019 Legislative Session* (Department of Legislative Services, April 12, 2019), pp. H-28-29; retrievable from <http://dls.maryland.gov/pubs/prod/RecurRpt/2019rs-90-day-report.pdf>

<sup>12</sup> Memorandum: Minimum Wage Economic Indicators, From: Jenna Bauer, To: OLO Staff, Summer 2018.

<sup>13</sup> 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](http://www.epi.org/minimum-wage-tracker/#/min_wage).

<sup>14</sup> 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](http://www.dol.gov/whd/minimumwage.htm)

<sup>15</sup> Code of the District of Columbia Chapter 10 Section 32-1003

<sup>16</sup> Labor and Employment Article, Title 3, Subtitle 4, Annotated Code of Maryland (<http://mgaleg.maryland.gov/webmga/frmStatutesText.aspx?article=gle&section=3-401&ext=html&session=2018RS&tab=subject5>); also see website for DLLR, which enforces the Montgomery County minimum wage: [www.dllr.state.md.us/labor/wages/wagehrfacts.shtml](http://www.dllr.state.md.us/labor/wages/wagehrfacts.shtml)

<sup>17</sup> 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/ccllms/bill\\_details.aspx?doc=1454&hl=3360](https://apps.montgomerycountymd.gov/ccllms/bill_details.aspx?doc=1454&hl=3360).

<sup>18</sup> Montgomery County Code Sec. 27-70A. Annual impact analysis; retrieved from [http://library.amlegal.com/nxt/gateway.dll/Maryland/montgom/partiilocallawsordinancesresolutionsetc/chapter27humanrightsandcivilliberties?f=templates\\$fn=default.htm\\$3.0\\$vid=amlegal:montgomeryco\\_md\\_mc\\$anc=JD\\_27-70A](http://library.amlegal.com/nxt/gateway.dll/Maryland/montgom/partiilocallawsordinancesresolutionsetc/chapter27humanrightsandcivilliberties?f=templates$fn=default.htm$3.0$vid=amlegal:montgomeryco_md_mc$anc=JD_27-70A).

<sup>19</sup> *Economic Indicators for Montgomery County and Surrounding Jurisdictions*, OLO Report 2019-1 (January 15, 2019).

<sup>20</sup> 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](http://www.bea.gov/help/faq/104).

<sup>21</sup> Bureau of Economic Analysis Data Availability retrieved from <https://apps.bea.gov/regional/docs/DataAvailability.cfm>.

<sup>22</sup> Occupational Employment Statistics: May 2017 Occupational Employment and Wage Estimates for the Silver Spring-Frederick-Rockville, MD Metropolitan Division.

<sup>23</sup> 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/](http://www.theatlantic.com/business/archive/2010/09/the-power-of-density/62569/).

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- <sup>24</sup> Interactive Data Tables: Regional Economic Accounts, Bureau of Economic Analysis, U.S. Dept. of Commerce; retrieved from [www.bea.gov/data/economic-accounts/regional](http://www.bea.gov/data/economic-accounts/regional).
- <sup>25</sup> 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](http://www.census.gov/programs-surveys/saipe.html).
- <sup>26</sup> 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](http://www.census.gov/data/tables/time-series/demo/income-poverty/historical-poverty-thresholds.html).
- <sup>27</sup> *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.
- <sup>28</sup> 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](http://www.census.gov/topics/income-poverty/guidance/data-sources.html).
- <sup>29</sup> USDA Food and Nutrition Service; retrieved from <https://www.fns.usda.gov/snap/eligibility>.
- <sup>30</sup> *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.
- <sup>31</sup> Small Area Income and Poverty Estimates (SAIPE), Census Bureau, U.S. Department of Commerce (Release date: December 2018); retrieved from [www.census.gov/data/datasets/time-series/demo/saipe/model-tables.html](http://www.census.gov/data/datasets/time-series/demo/saipe/model-tables.html).
- <sup>32</sup> USDA, “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>. (accessed January 13, 2020).
- <sup>33</sup> 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](http://www.bea.gov/help/faq/104).
- <sup>34</sup> *Ibid*, p. II-8.
- <sup>35</sup> Bureau of Labor Statistics, U.S. Dept of Labor, Economic News Release: State Employment and Unemployment Technical Note (version last modified Nov. 16, 2018); retrieved from [www.bls.gov/news.release/laus.tn.htm](http://www.bls.gov/news.release/laus.tn.htm).
- <sup>36</sup> 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](http://www.bls.gov/opub/mlr/1976/article/employment_and_unemployment_the_doughnut.htm).
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- <sup>38</sup> *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/](http://www.theatlantic.com/business/archive/2017/01/economism-and-the-minimum-wage/513155/).
- <sup>39</sup> Bureau of Economic Analysis (U.S. Dept. of Commerce): Regional Definitions
- <sup>40</sup> *Tracking the gig economy: New numbers*, I. Hathaway and M. Muro (Brookings, October 13, 2016); retrieved from [www.brookings.edu/research/tracking-the-gig-economy-new-numbers/](http://www.brookings.edu/research/tracking-the-gig-economy-new-numbers/).
- <sup>41</sup> *Earnings Without a Salary: Trends in Proprietors’ Income in the Washington Region*, E. Harpel (The Stephen S. Fuller Institute for Research on the Washington Region’s Economic Future, April 30, 2018) p. 1.
- <sup>42</sup> Bureau of Economic Analysis (U.S. Dept. of Commerce): Regional Definitions
- <sup>43</sup> Bureau of Economic Analysis (U.S. Dept. of Commerce), *State Personal Income and Employment: Concepts, Data Sources, and Statistical Methods* (September 2018), pdf p.23; retrieved from [www.bea.gov/system/files/2018-11/SPI2017.pdf](http://www.bea.gov/system/files/2018-11/SPI2017.pdf).
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- <sup>45</sup> Definition from Bureau of Economic Analysis website: <https://apps.bea.gov/regional/definitions/>.
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- <sup>47</sup> Definition from Bureau of Economic Analysis website: <https://apps.bea.gov/regional/definitions/>.
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- <sup>57</sup> Poverty Guidelines, Office of the Assistant Secretary for Planning and Evaluation, U.S. Department of Health and Human Services; retrieved from <https://aspe.hhs.gov/poverty-guidelines>.
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- <sup>63</sup> U.S. OMB delineates CBSAs and their subdivisions according to published standards and periodically revises these delineations; [www.census.gov/programs-surveys/metro-micro/about.html](http://www.census.gov/programs-surveys/metro-micro/about.html)
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