Economic Trends in the District
Job Change
District of Columbia, 2002-2017

Annual Change
Annual Month-Over-Year Change
Mar 17 = +6.2

Sources: U.S. Bureau of Labor Statistics (Not Seasonally Adjusted), The Stephen S. Fuller Institute at the Schar School, GMU

Job Change by Sector

Total = 28,900

Ranked by Size in 2016
Federal Govt
Prof. & Business Services
Edu. & Health Services
Leisure & Hospitality
Other Services
State & Local Govt
Financial Activities
Retail Trade
Information
Construction
Wholesale Trade
Transportation & Utilities
Manufacturing

(000s)

Sources: U.S. Bureau of Labor Statistics (Seasonally Adjusted), The Stephen S. Fuller Institute at the Schar School, GMU

= 71% of gains
= 48% of all jobs in 2016
Average Wage per Job District of Columbia, 2015 (in 000s)

Ranked by Size in 2016
- Federal Govt: 107.5
- Prof. & Business Services: 108.2
- Edu. & Health Services: 60.6
- Leisure & Hospitality: 36.8
- Other Services: 104.3
- State & Local Govt: 101.2
- Financial Activities: 103.1
- Retail Trade: 70.7
- Information: 102.7
- Construction: 101.2
- Wholesale Trade: 94.1
- Transportation & Utilities: 100.2
- Manufacturing: 71.6

Average = $88.2


Population Growth by Sub-State Area Washington Region, 2010 to 2016

- D.C.
- Northern Virginia
- Washington Region
- Suburban Maryland

Sources: U.S. Census Bureau (v2016 Population Estimates); The Stephen S. Fuller Institute at the Schar School, GMU
Economic Trends in the Washington Region

15 Largest U.S. Job Markets

Washington: +55,600

Sources: U.S. Bureau of Labor Statistics (Not Seasonally Adjusted), The Stephen S. Fuller Institute at the Schar School, GMU
### The Washington Region’s Advanced Industrial Clusters
March 2016

<table>
<thead>
<tr>
<th>Cluster</th>
<th>As a % of All Private Sector Jobs</th>
<th>In the Washington Region</th>
<th>In the U.S.</th>
<th>Location Quotient</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advocacy</td>
<td>5.0%</td>
<td>1.3%</td>
<td>3.8</td>
<td></td>
</tr>
<tr>
<td>Information Communications Technology</td>
<td>8.8%</td>
<td>3.1%</td>
<td>2.9</td>
<td></td>
</tr>
<tr>
<td>Business Services</td>
<td>7.9%</td>
<td>4.5%</td>
<td>1.8</td>
<td></td>
</tr>
<tr>
<td>Science &amp; Security Technology</td>
<td>4.4%</td>
<td>2.5%</td>
<td>1.7</td>
<td></td>
</tr>
<tr>
<td>Media &amp; Information</td>
<td>1.2%</td>
<td>0.8%</td>
<td>1.5</td>
<td></td>
</tr>
<tr>
<td>Business &amp; Leisure Travel</td>
<td>3.1%</td>
<td>2.8%</td>
<td>1.1</td>
<td></td>
</tr>
<tr>
<td>Biological &amp; Health Technology</td>
<td>0.6%</td>
<td>0.8%</td>
<td>0.7</td>
<td></td>
</tr>
<tr>
<td><strong>All Clusters</strong></td>
<td><strong>30.9%</strong></td>
<td><strong>15.8%</strong></td>
<td><strong>2.0</strong></td>
<td></td>
</tr>
</tbody>
</table>

Sources: U.S. Bureau of Labor Statistics (QCEW), The Stephen S. Fuller Institute at the Schar School, GMU

### The Washington Region’s Advanced Industrial Clusters: Average Wage in 2015

<table>
<thead>
<tr>
<th>Cluster</th>
<th>Average Wage 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Private Jobs</td>
<td>$68,150</td>
</tr>
<tr>
<td>Private, Non-Cluster</td>
<td>$51,810</td>
</tr>
<tr>
<td>Private, Cluster</td>
<td>$103,780</td>
</tr>
<tr>
<td>Business &amp; Leisure Travel</td>
<td>$53,360</td>
</tr>
<tr>
<td>Science &amp; Security Tech.</td>
<td>$93,450</td>
</tr>
<tr>
<td>Advocacy</td>
<td>$95,530</td>
</tr>
<tr>
<td>Media &amp; Information</td>
<td>$106,160</td>
</tr>
<tr>
<td>Business Services</td>
<td>$114,220</td>
</tr>
<tr>
<td>Info. Comm. Tech.</td>
<td>$121,010</td>
</tr>
<tr>
<td>Biological &amp; Health Tech.</td>
<td>$132,190</td>
</tr>
</tbody>
</table>

Sources: U.S. Bureau of Labor Statistics (Quarterly Census of Employment and Wages); The Stephen S. Fuller Institute at the Schar School, GMU
Growth Rates of the Washington Region’s Advanced Industrial Clusters, Mar 2014 – Mar 2016

Sources: U.S. Bureau of Labor Statistics (QCEW), The Stephen S. Fuller Institute at the Schar School, GMU

Average Wage in the Washington Region

Source: U.S. Bureau of Labor Statistics (Quarterly Census of Employment and Wages); The Stephen S. Fuller Institute at the Schar School, GMU
Outlook and Headwinds

The Direct Effect of the Trump Blueprint on Federal Jobs in the Region

<table>
<thead>
<tr>
<th>Region</th>
<th>Federal Jobs</th>
<th>As a % of Federal Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Low</td>
<td>High</td>
</tr>
<tr>
<td>District of Columbia</td>
<td>(14,000)</td>
<td>(15,000)</td>
</tr>
<tr>
<td>Suburban Maryland</td>
<td>(5,500)</td>
<td>(6,000)</td>
</tr>
<tr>
<td>Northern Virginia</td>
<td>(500)</td>
<td>(3,600)</td>
</tr>
<tr>
<td>Washington Region</td>
<td>(20,000)</td>
<td>(24,600)</td>
</tr>
</tbody>
</table>

Source: The Stephen S. Fuller Institute at the Schar School, GMU
Employment Forecast Scenarios
Washington Region

Sources: BLS, IHS Economics, The Stephen S. Fuller Institute at the Schar School, GMU (forecast as of April 2017)
(a) Incorporating spending reductions providing for in the Budget Control Act of 2011.
(b) Reflecting federal spending reductions in Trump FY 2018 Budget Blueprint released March 16, 2017

Employment Change by Sub-State Area
Baseline Forecast (000s)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>D.C.</td>
<td>5.2</td>
<td>15.9</td>
<td>13.0</td>
<td>8.9</td>
<td>5.3</td>
<td>4.9</td>
<td>4.5</td>
<td>3.5</td>
</tr>
<tr>
<td>Sub. MD</td>
<td>10.2</td>
<td>12.5</td>
<td>14.4</td>
<td>14.4</td>
<td>12.7</td>
<td>10.9</td>
<td>8.0</td>
<td>5.7</td>
</tr>
<tr>
<td>No. VA</td>
<td>0.8</td>
<td>29.8</td>
<td>31.0</td>
<td>23.9</td>
<td>26.6</td>
<td>19.7</td>
<td>13.7</td>
<td>12.9</td>
</tr>
<tr>
<td>REGION</td>
<td>18.6</td>
<td>57.7</td>
<td>55.6</td>
<td>45.9</td>
<td>41.3</td>
<td>33.1</td>
<td>27.9</td>
<td>24.0</td>
</tr>
</tbody>
</table>

Average Annual Change 1990-2010 = 36,300

Sources: BLS, IHS Economics, The Stephen S. Fuller Institute at the Schar School, GMU (forecast as of April 2017)
NOTE: The regional totals include Jefferson, WV.
Population by Age
Washington Region, 2015

Sources: U.S. Census Bureau; v2015 Population Estimates; The Stephen S. Fuller Institute at the Schar School, GMU

Questions?

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