DOWNTOWNDC

Downtown DC Employment Study

April 19, 2022 (Final)

ESI ECONSULT SOLUTIONS INC.
economics | strategy | insight

THE RIDDLE COMPANY
Strategy | Implementation | Impact



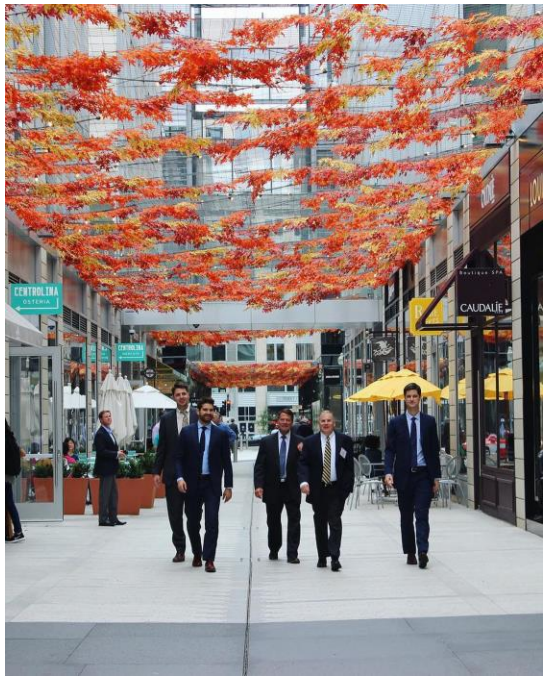
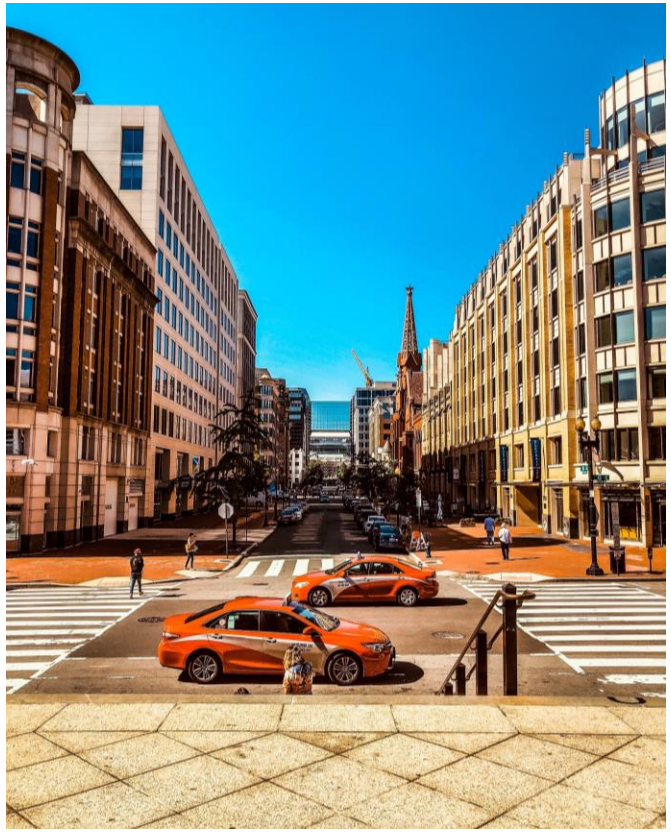






Table of Contents

The Team	3
Introduction	4
Executive Summary	5
Definitions and Methodologies	6
DowntownDC BID	7
Geographies Used in The Analysis	8
Employment Analysis	10
DowntownDC BID Workforce Analysis	20
Residential Analysis	23
Commuter Shed Comparative Analysis	26
SWOT: Strengths, Weaknesses, Opportunities & Threats	30
Appendix	33





The Team

Econsult Solutions, Inc. provides businesses and public policy makers with consulting services in economics, real estate, transportation, public infrastructure, public policy and finance, community and neighborhood development, planning, as well as expert witness services for litigation support. Our portfolio of work covers a diverse range of economic and fiscal related issues, including economic and fiscal impacts, tax policy, real estate development, infrastructure investment, workforce development and labor force issues, education and healthcare and intergovernmental relations (local, county, and state). Our technical expertise ranges from big data analysis to GIS based spatial analytics, sophisticated benefit-cost analysis to pro forma based project feasibility analysis.

Our real estate practice is based on sound economic analysis, academic-level rigor, and real-world experience with the real estate development community. We frequently assist private sector and government clients in a wide range of analyses, advice, planning and presentation. The firm's talents marry well with the needs of many entities, including developers trying to demonstrate the value of their proposed project to the community, urban planners interested in which types of uses are economically feasible for a redevelopment area, regional business coalitions that want to illustrate the value of a desired public feature such as open space, governments investigating the economic and financial feasibility of a proposed development and attorneys litigating a real estate-related matter.

The Riddle Company, LLC is DC-based real estate and economic development marketing consulting practice. The Riddle Company provides an array of services to support business attraction and economic investment including strategic marketing and planning, market and client research, business attraction strategies, and media and public relations. Since inception in 1991, The Riddle Company, a woman-owned company, has established a diverse portfolio of private and public clients which includes real estate development companies, brokers and investors, economic development organizations, and downtown development organizations.

Key to all client consultant relationships is strategic planning. The business and strategic plans we have developed and executed range in value from $50K to $5 million. The firm has completed business and retail marketing and attraction strategies for almost every major market on the East Coast and smaller communities and neighborhoods including Miami, Atlanta, Washington, Baltimore, Philadelphia, Newark, Boston, Ohio City, Media and Frederick. This work has resulted in nearly $1 billion of new investment, 7,250 net new jobs, and over 7 million square feet of new retail. Key Areas of Specialization include: retail market studies, competitive market analyses & comparative analyses, consumer & market surveys, economic feasibility & impact studies, economic development marketing & positioning, business attraction & investment, downtown marketing & planning.

Introduction

The overall goal of the DowntownDC BID Employment Study is to understand (1) the size and makeup of employment within the DowntownDC BID and (2) the contribution of employment in the BID to the District of Columbia's and the region's total employment. To that end, this study provides a snapshot of existing employment conditions in the BID.

The employment estimates are broken out by major industry categories for Downtown DC and several other geographies. These geographies include the District of Columbia, the Maryland Suburbs (Montgomery and Prince George's Counties), and the Northern Virginia (Arlington and Fairfax Counties and the cities of Alexandria, Fairfax and Falls Church) and DC Metro Region (which is defined as the District plus the locations include in Northern Virginia and Suburban Maryland). We also provided the salary of workers and the location of employee residence to be able to say how many employees live in each of DC's Wards, Northern Virginia and the Maryland Suburbs, based on 2019 data as provided by the U.S. Census Bureau's Longitudinal Employer-Household Dynamics (LEHD) dataset. Complementing these data is a commuter shed for Downtown DC. This data provides insight into who are the potential workers for current employers and those companies considering a location in Downtown DC.

This report relies on various data sources. A large share of the demographic and economic data is from Esri Business Analyst, which incorporates 2019 American Community Survey and Census Data for past years and applies projections to these numbers for future years including 2021 and 2026. Data from the U.S. Census Bureau's Longitudinal Employer-Household Dynamics (LEHD) provides granular industry-level employment information through 2019, although some federal employment is suppressed for national security reasons. The Bureau of Labor Statistics offers the most up-to-date employment data at the city and county level, which can be used in combination with other sources to estimate employment within Downtown DC. Together, these datasets provide a baseline understanding of current employment in Downtown DC and the region. It is important to note there are some gaps due to lack of available data. For example, without proprietary information, it is difficult break out the details of federal and local jobs classified as 'public service' within the DowntownDC BID geography. This difficulty is due to delay in data reporting, as well as incomplete reporting at the federal level for jobs that are classified. Federal and local jobs estimates for the DowntownDC BID area are based on a combination of sources, including office square footage estimates from the DowntownDC BID and LEHD data. Gaps and resources are noted with each table.

Executive Summary

Downtown DC is a significant employment cluster in the District of Columbia and the metro region, with 74.6 million square feet of office space. Downtown DC is also home to some of the region's largest entertainment anchors (DC Convention Center and Capital One Arena) and related uses including restaurants and hotels.

At present there are over 175,000 workers within the DowntownDC BID, representing approximately 24% of the District of Columbia's overall workforce. The largest cluster of workers by industry in 2021 is within public administration (37%) followed by professional, scientific and technical services (24%). Workers in professional scientific and technical services remained nearly the same from 2019 to 2021, with a decrease of just 120 workers out of a total of 42,500 in 2019. The Downtown DC workforce has retracted by more than 10,000 since 2019 (13,310), in part due to the pandemic, and then the move to a more hybrid work environment. The greatest loss, 9,160 jobs, is in accommodation and food services (hospitality, restaurants, etc.), and is a direct result of the pandemic. Many of these jobs are expected to return as the recovery and return to work continues. The District overall lost 54,100 jobs between 2019 and 2021. Despite the recent loss of jobs, the percent of jobs by industry classification has remained largely the same over this time period.

Downtown DC boasts the best educated workforce in the DC Metro Region, with more than 48% of its existing workforce and 77% of the potential workforce with a Bachelor's degree or above. Sixty percent of workers in Downtown are between the ages of 30-54, as compared to 58% in DC and 56% in the DC Metro Region. The workers in Downtown DC who reside in DC come primarily from Ward 6 (20%), Ward 1 (16%), Wards 2 & 5 (13%) and Ward 4 (12%).



Definitions & Methodology

Definitions

DC Metro Region: includes Washington, DC, Arlington and Fairfax Counties and the cities of Fairfax, Falls Church and Alexandria in Virginia, and Montgomery and Prince George's Counties in Maryland.

Northern Virginia (NoVa): Arlington and Fairfax Counties and the cities of Fairfax, Falls Church, and Alexandria in Virginia.

Maryland Suburbs: Montgomery and Prince George's Counties in Maryland.

25-Minute Walk Time: is a twenty-five minute walk time from the intersection of 9th & G Streets, NW in DC. This includes commuters that walk and those that utilize public transit within that boundary.

30-Minute Drive Time: is commuters within a 30-minute drive in all directions from the intersection of 9th & G Streets, NW in DC. This includes commuters that utilize public transit within that boundary.

45-Minute Drive Time: is commuters within a 45-minute drive in all directions from the intersection of 9th & G Streets, NW in DC. This includes commuters that utilize public transit within that boundary.

Other services (except public administration): This designation corresponds to NAICS code 81, which includes repair and maintenance; personal and laundry services; and religious, grantmaking, civic, professional, and similar organizations.

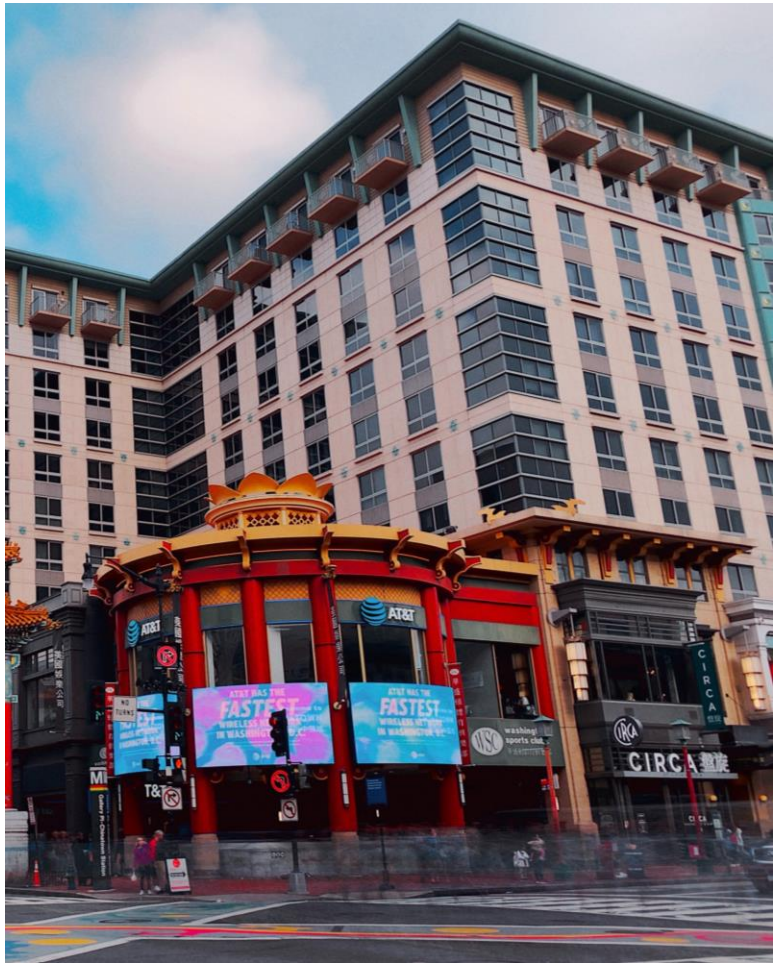
Methodologies

Three main data sources were used in the preparation of this report: the Bureau of Labor Statistics (BLS, particularly the Quarterly Census of Employment and Wages), U.S. Census Bureau's Longitudinal Employer-Household Dynamics (LEHD) dataset, and Esri Business Analyst. These three sources use different methodologies and are not directly comparable with each other. The BLS and LEHD both use administrative data records among other sources, while Esri uses U.S. Census Bureau American Community Survey (ACS) data to estimate current levels of employment and other data. LEHD and Esri both allow for analysis of custom geographies (like the DowntownDC BID area), although certain data is suppressed for national security reasons.

Because of this limitation, the overall employment count and industry breakdowns use BLS employment numbers for private sector, federal, and local/state government jobs, and applies the industry breakdowns from the LEHD to all geographies. These industry breakdowns are only available at the two-digit NAICS code level. To supplement this data (including subdividing Accommodation and Food Service into two categories and Public Service into federal and local/state government), these breakdowns were found through BLS, Esri, and an analysis from the DowntownDC BID of federal and local government office square footage within the BID's boundaries. These sources were also used to project the 2019 industry breakdowns from the LEHD forward to 2021, as 2019 is the most recent year available through LEHD.

Note that while the industry breakdowns provide the most comprehensive values for employment at the relevant geographies, it is not possible to similarly analyze worker demographics, given data limitations. In some sections of this report, job counts will be lower than those given by the BLS. However, the percent breakdowns between different categories should be understood to be accurate within the constraints of data availability.

DowntownDC BID



The DowntownDC Business Improvement District (BID) is a private nonprofit organization that provides capital improvements, resources, and research that keep the BID area clean, safe, economically and environmentally strong, and accessible.

Founded in 1997, the BID encompasses a 138-block area of approximately 520 properties from Massachusetts Avenue on the north to Constitution Avenue on the south, and from Louisiana Avenue on the east to 16th Street on the west.

The DowntownDC BID is a significant employment cluster in the District of Columbia and the metro region, with 74.6 million square feet of office space. The DowntownDC BID is also home to some of the region's largest entertainment anchors (DC Convention Center and Capital One Arena) and related uses including restaurants and hotels.

Downtown DC Locational Advantages

Downtown DC boasts the best educated workforce in the Washington Metro Region, with over 48% of its existing workforce and 77% of the potential workforce with a Bachelor's degree or above.

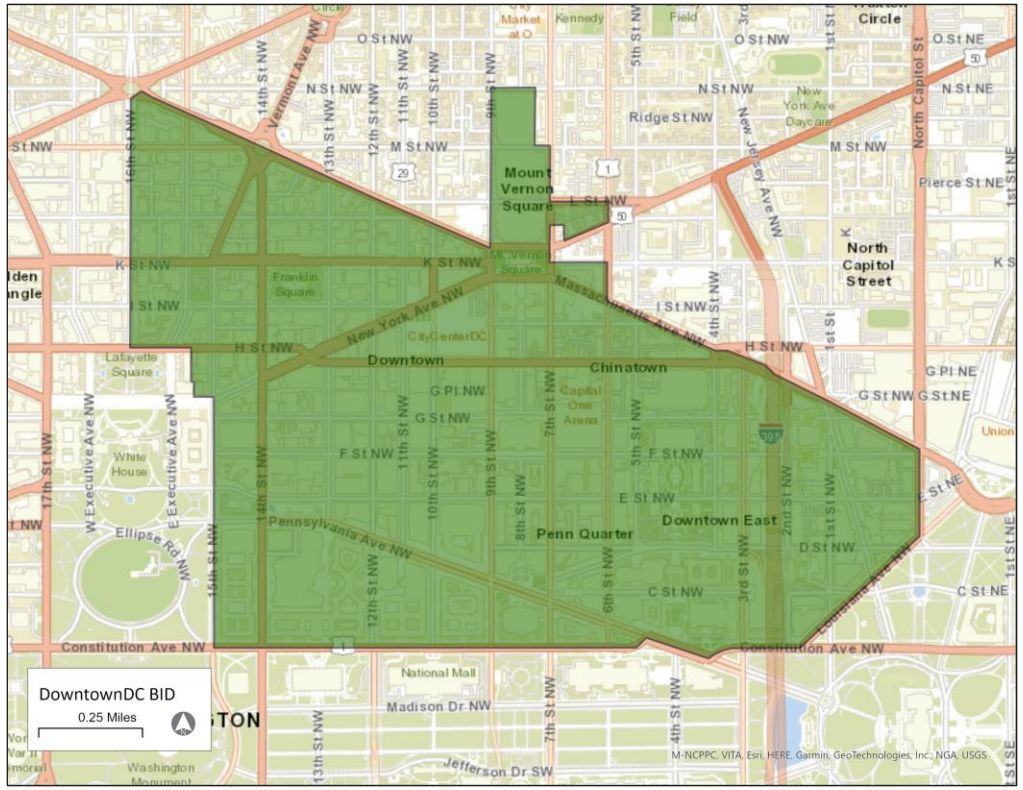
Downtown DC's level of connectivity exceeds that of any office market in the region, achieved by a diverse nexus of public transit and walkability, with an average Walk Score over 90.

Employers and employees alike have access to the most abundant assortment of amenities from restaurants, open space, and cultural facilities, to retail and entertainment, in the region.

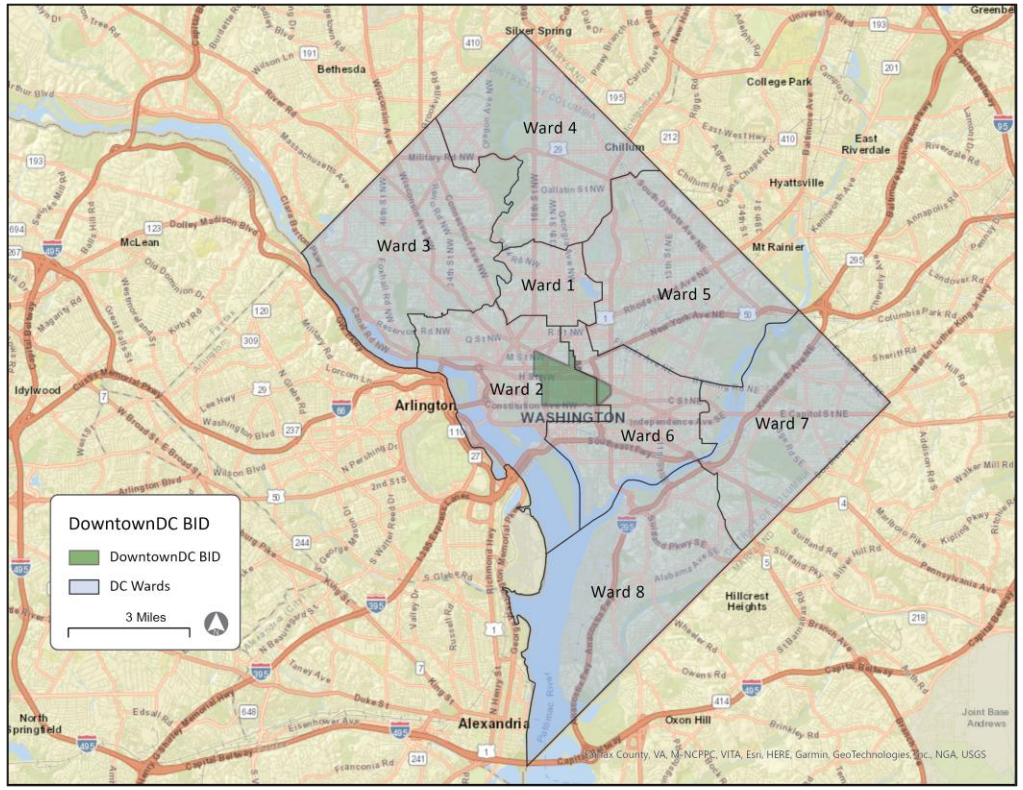
Geographies for The Analysis

The primary geographies for the employment analysis are the boundaries of the DowntownDC BID and the District of Columbia as shown here, as well as the DC Wards (boundaries pre-2022 changes). In addition, the DC Metro Region has been defined in this study as Washington, DC, Arlington & Fairfax Counties, the cities of Fairfax, Falls Church and Alexandria in Northern Virginia, and Montgomery and Prince George's Counties in Maryland. Finally, a commuter shed (next slide) has been used where available for the primary employment analysis for comparison purposes.

DowntownDC BID Boundary



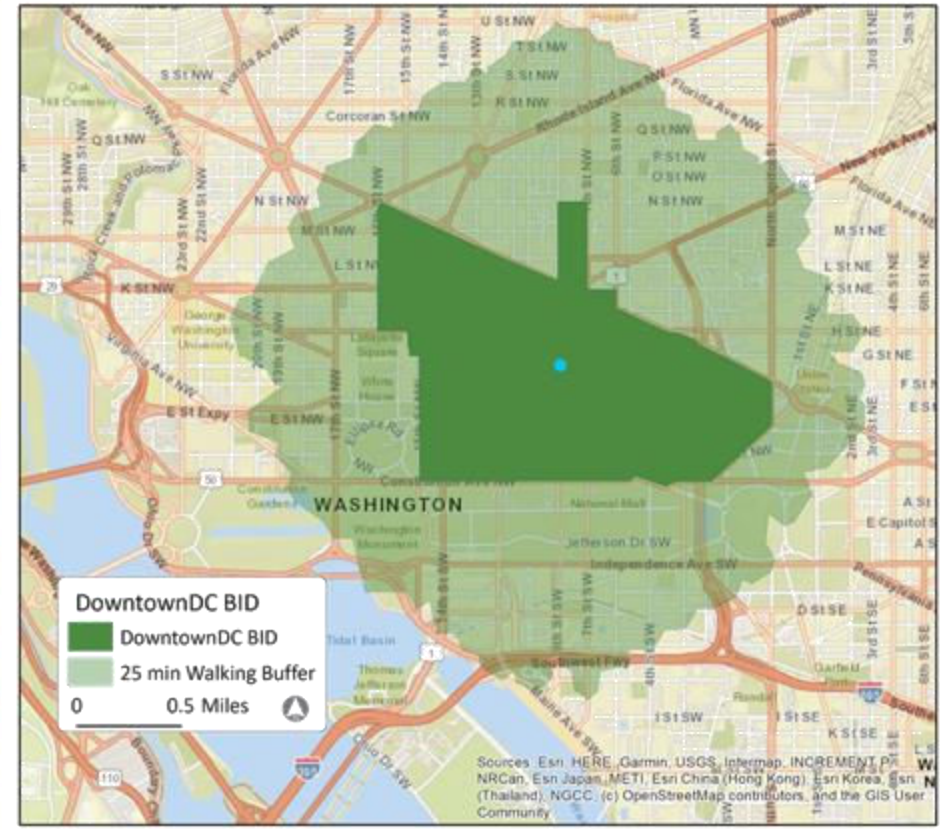
Washington, DC – Ward Map



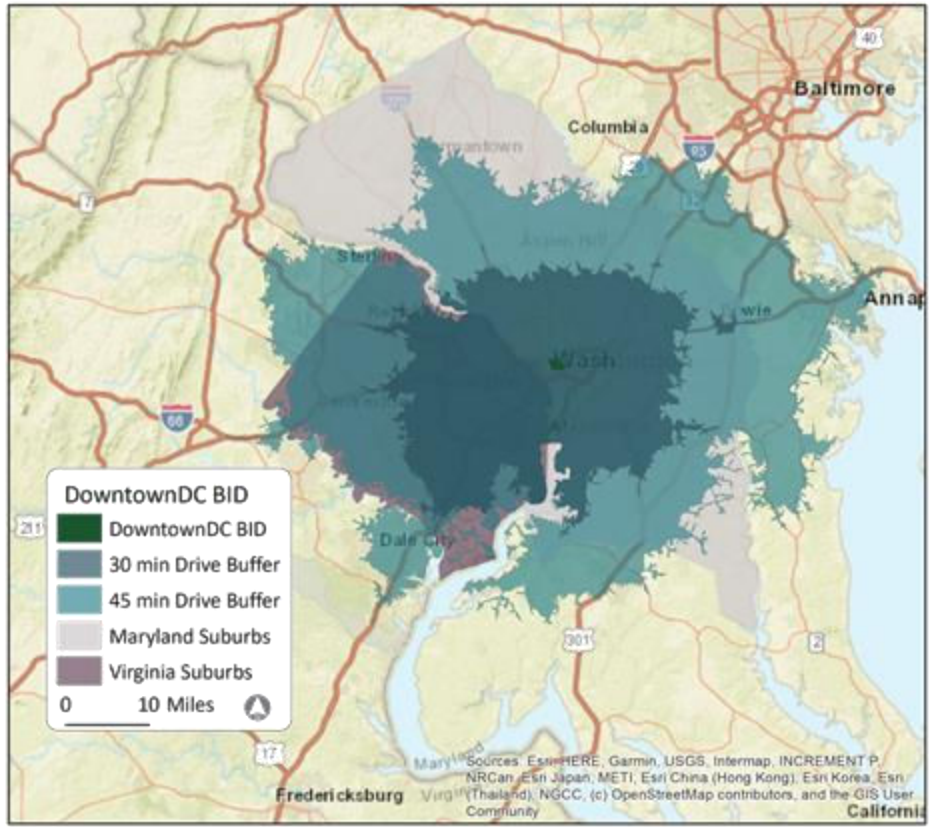
Geographies for The Analysis

The maps below show the geographies used for the commuter shed analysis. The commuter shed is the area(s) from which workers can commute to the DowntownDC BID for employment based on a certain time constraint and form of transportation. For example, a 25-minute walk time is the area within a 25-minute walk from the central point of the BID. The central point is defined as the center of the intersection of 9th and G Streets, NW. Appropriate commuter sheds for Downtown DC are a 25-minute walk time and a 30-minute and 45-minute drive time. These sheds also account for workers who use public transit, including WMATA (Metro and Buses) and regional rail to a limited extent.

Downtown DC Walk Times – 25 minutes from the center of the DowntownDC BID



Downtown DC Drive Times – 30 and 45 minutes from center of the DowntownDC BID





Employment Analysis

This section contains analysis of employment in the DC Metro Region. The employment analysis includes data for 2010, 2019, and 2021 for all jobs (including both private and public sector), organized by the location of their jobs. The data is segmented by the following:

- Total jobs in 2021
- Workers by industry classification (NAICS Code)
- Worker demographics in 2019 and 2010

These values are based on the U.S. Census Bureau's Longitudinal Employer-Household Dynamics (LEHD) dataset and the Bureau of Labor Statistics Quarterly Census of Employment and Wages (QCEW). Because of privacy considerations, these sources do not provide sufficient data to understand the worker demographics into 2021. Additionally, a portion of public sector jobs are not represented in the worker demographic dataset, although they have been accounted for in the total job count and industry breakdowns.

Worker Industries – DowntownDC BID as a Share of DC

Jobs within the DowntownDC BID boundary represent 24 percent of all jobs within the District of Columbia, with particularly strong numbers in professional, scientific, and technical services (39% of DC total).

Workers by Industry, DowntownDC BID and District of Columbia (2021 Estimate)

	DowntownDC BID		District of Columbia		DowntownDC BID as Percent of DC Total
	Number	Percent	Number	Percent	Percent
Industries	**177,680**	**100%**	**743,100**	**100%**	**24%**
Public Administration	66,150	37%	248,400	33%	27%
Federal	60,930	-	205,670	-	30%
Local/State	5,220	-	42,730	-	12%
Professional, Scientific, and Technical Services	42,380	24%	109,210	15%	39%
Other Services [except Public Administration	22,710	13%	66,810	9%	34%
Accommodation and Food Services	10,580	6%	63,810	9%	17%
Accommodation	2,230	-	10,470	-	21%
Food Service	8,350	-	53,340	-	16%
Administrative and Support and Waste Management and Remediation Services	9,220	5%	43,280	6%	21%
Information	6,220	4%	18,470	2%	34%
Finance and Insurance	3,900	2%	13,670	2%	29%
Real Estate and Rental and Leasing	2,770	2%	11,700	2%	24%
Construction	2,550	1%	14,180	2%	18%
Health Care and Social Assistance	2,530	1%	65,060	9%	4%
Retail Trade	2,280	1%	21,060	3%	11%
Arts, Entertainment, and Recreation	1,950	1%	9,780	1%	20%
Wholesale Trade	1,380	1%	4,600	1%	30%
Educational Services	1,350	1%	44,750	6%	3%
Management of Companies and Enterprises	1,150	1%	2,490	0%	46%
Utilities	230	0%	2,040	0%	11%
Manufacturing	190	0%	1,220	0%	16%
Transportation and Warehousing	140	0%	2,550	0%	5%
Agriculture, Forestry, Fishing and Hunting	0	0%	30	0%	0%
Mining, Quarrying, and Oil and Gas Extraction	0	0%	0	0%	N/A

Source: ESI estimate, using BLS and LEHD Data (2021, 2019 and 2010). Industries are based on 2-digit NAICS codes except where additional level of detail is provided to distinguish between federal and state and local public sector jobs, and between accommodation and food service.

Worker Industries – DowntownDC BID as a Share of Region

Jobs within the DowntownDC BID boundary represent 7 percent of all jobs within the DC Metro Region.

Workers by Industry, DowntownDC BID and DC Metro Region (2021 Estimate)

	DowntownDC BID		DC Metro Region		DowntownDC BID as Percent of Region Total
	Number	Percent	Number	Percent	Percent
Industries	**177,680**	**100%**	**2,373,620**	**100%**	**7%**
Public Administration	66,150	37%	575,480	24%	11%
Federal	60,930	-	353,950	-	17%
Local/State	5,220	-	221,530	-	2%
Professional, Scientific, and Technical Services	42,380	24%	418,600	18%	10%
Other Services [except Public Administration	22,710	13%	139,220	6%	16%
Accommodation and Food Services	10,580	6%	188,870	8%	6%
Accommodation	2,230	-	29,090	-	8%
Food Service	8,350	-	159,780	-	5%
Administrative and Support and Waste Management and Remediation Services	9,220	5%	152,490	6%	6%
Information	6,220	4%	58,060	2%	11%
Finance and Insurance	3,900	2%	66,660	3%	6%
Real Estate and Rental and Leasing	2,770	2%	41,670	2%	7%
Construction	2,550	1%	90,400	4%	3%
Health Care and Social Assistance	2,530	1%	227,730	10%	1%
Retail Trade	2,280	1%	162,870	7%	1%
Arts, Entertainment, and Recreation	1,950	1%	31,030	1%	6%
Wholesale Trade	1,380	1%	39,580	2%	3%
Educational Services	1,350	1%	77,210	3%	2%
Management of Companies and Enterprises	1,150	1%	35,130	1%	3%
Utilities	230	0%	4,880	0%	5%
Manufacturing	190	0%	27,060	1%	1%
Transportation and Warehousing	140	0%	35,360	1%	0%
Agriculture, Forestry, Fishing and Hunting	0	0%	970	0%	0%
Mining, Quarrying, and Oil and Gas Extraction	0	0%	350	0%	0%

Source: ESI estimate, using BLS and LEHD Data (2021, 2019 and 2010). Industries are based on 2-digit NAICS codes except where additional level of detail is provided to distinguish between federal and state and local public sector jobs, and between accommodation and food service.

Worker Industries – DowntownDC BID as a Share of DC

Workers by Industry, DowntownDC BID and District of Columbia (2019 Estimate)

	DowntownDC BID		District of Columbia		DowntownDC BID as Percent of DC Total
	Number	Percent	Number	Percent	Percent
Industries	**190,990**	**100%**	**797,220**	**100%**	**24%**
Public Administration	64,700	34%	242,950	30%	27%
Federal	59,590	-	200,550	-	30%
Local/State	5,110	-	42,400	-	12%
Professional, Scientific, and Technical Services	42,500	22%	122,360	15%	35%
Other Services [except Public Administration	24,420	13%	74,850	9%	33%
Accommodation and Food Services	19,740	10%	71,490	9%	28%
Accommodation	5,660	-	16,270	-	35%
Food Service	14,080	-	55,220	-	25%
Administrative and Support and Waste Management and Remediation Services	10,430	5%	48,490	6%	22%
Information	6,380	3%	20,700	3%	31%
Finance and Insurance	4,090	2%	15,320	2%	27%
Real Estate and Rental and Leasing	2,910	2%	13,110	2%	22%
Construction	2,530	1%	15,880	2%	16%
Health Care and Social Assistance	2,650	1%	72,890	9%	4%
Retail Trade	2,650	1%	23,600	3%	11%
Arts, Entertainment, and Recreation	3,370	2%	10,960	1%	31%
Wholesale Trade	1,360	1%	5,150	1%	26%
Educational Services	1,480	1%	50,140	6%	3%
Management of Companies and Enterprises	1,110	1%	2,790	0%	40%
Utilities	240	0%	2,290	0%	10%
Manufacturing	230	0%	1,360	0%	17%
Transportation and Warehousing	200	0%	2,850	0%	7%
Agriculture, Forestry, Fishing and Hunting	0	0%	40	0%	0%
Mining, Quarrying, and Oil and Gas Extraction	0	0%	0	0%	N/A

Source: ESI estimate, using BLS and LEHD Data (2021, 2019 and 2010). Industries are based on 2-digit NAICS codes except where additional level of detail is provided to distinguish between federal and state and local public sector jobs, and between accommodation and food service.

Worker Industries – DowntownDC BID as a Share of Region

Workers by Industry, DowntownDC BID and DC Metro Region (2019 Estimate)

	DowntownDC BID		DC Metro Region		DowntownDC BID as Percent of Region Total
	Number	Percent	Number	Percent	Percent
Industries	**190,990**	**100%**	**2,519,120**	**100%**	**8%**
Public Administration	64,700	34%	572,540	23%	11%
Federal	59,590	-	341,700	-	17%
Local/State	5,110	-	230,840	-	2%
Professional, Scientific, and Technical Services	42,500	22%	450,880	18%	9%
Other Services [except Public Administration	24,420	13%	152,210	6%	16%
Accommodation and Food Services	19,740	10%	205,260	8%	10%
Accommodation	5,660	-	42,360	-	13%
Food Service	14,080	-	162,900	-	9%
Administrative and Support and Waste Management and Remediation Services	10,430	5%	165,130	7%	6%
Information	6,380	3%	62,810	2%	10%
Finance and Insurance	4,090	2%	71,830	3%	6%
Real Estate and Rental and Leasing	2,910	2%	45,230	2%	6%
Construction	2,530	1%	97,910	4%	3%
Health Care and Social Assistance	2,650	1%	247,340	10%	1%
Retail Trade	2,650	1%	175,500	7%	2%
Arts, Entertainment, and Recreation	3,370	2%	33,700	1%	10%
Wholesale Trade	1,360	1%	42,590	2%	3%
Educational Services	1,480	1%	84,860	3%	2%
Management of Companies and Enterprises	1,110	1%	37,420	1%	3%
Utilities	240	0%	5,330	0%	5%
Manufacturing	230	0%	29,230	1%	1%
Transportation and Warehousing	200	0%	37,930	2%	1%
Agriculture, Forestry, Fishing and Hunting	0	0%	1,050	0%	0%
Mining, Quarrying, and Oil and Gas Extraction	0	0%	370	0%	0%

Source: ESI estimate, using BLS and LEHD Data (2021, 2019 and 2010). Industries are based on 2-digit NAICS codes except where additional level of detail is provided to distinguish between federal and state and local public sector jobs, and between accommodation and food service.

Worker Industries – DowntownDC BID as a Share of DC

Workers by Industry, DowntownDC BID and District of Columbia (2010 Estimate)

	DowntownDC BID		District of Columbia		DowntownDC BID as Percent of DC Total
	Number	Percent	Number	Percent	Percent
Industries	**168,820**	**100%**	**712,200**	**100%**	**24%**
Public Administration	67,140	40%	252,050	35%	27%
Federal	61,820	-	216,340	-	29%
Local/State	5,300	-	35,690	-	15%
Professional, Scientific, and Technical Services	34,960	21%	107,750	15%	32%
Other Services [except Public Administration	19,890	12%	64,600	9%	31%
Accommodation and Food Services	15,600	9%	54,920	8%	28%
Accommodation	5,590	-	15,960	-	35%
Food Service	10,010	-	38,960	-	26%
Administrative and Support and Waste Management and Remediation Services	8,050	5%	41,500	6%	19%
Information	6,480	4%	19,990	3%	32%
Finance and Insurance	4,310	3%	13,310	2%	32%
Real Estate and Rental and Leasing	2,000	1%	10,200	1%	20%
Construction	1,270	1%	10,200	1%	12%
Health Care and Social Assistance	2,290	1%	57,220	8%	4%
Retail Trade	1,460	1%	19,300	3%	8%
Arts, Entertainment, and Recreation	2,530	1%	7,950	1%	32%
Wholesale Trade	680	0%	4,710	1%	14%
Educational Services	890	1%	40,520	6%	2%
Management of Companies and Enterprises	610	0%	2,380	0%	26%
Utilities	300	0%	2,200	0%	14%
Manufacturing	260	0%	1,210	0%	21%
Transportation and Warehousing	100	0%	2,190	0%	5%
Agriculture, Forestry, Fishing and Hunting	0	0%	0	0%	N/A
Mining, Quarrying, and Oil and Gas Extraction	0	0%	0	0%	N/A

Source: ESI estimate, using BLS and LEHD Data (2021, 2019 and 2010). Industries are based on 2-digit NAICS codes except where additional level of detail is provided to distinguish between federal and state and local public sector jobs, and between accommodation and food service.

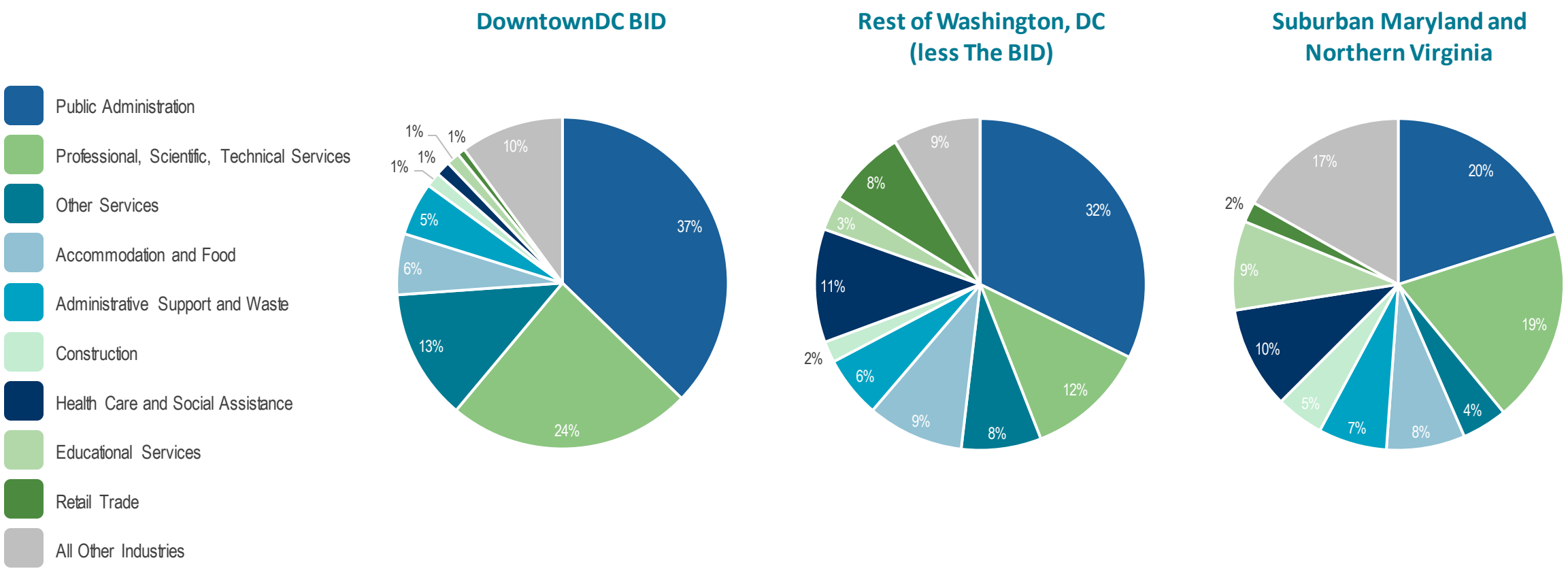
Worker Industries – DowntownDC BID as a Share of Region

Workers by Industry, DowntownDC BID and DC Metro Region (2010 Estimate)

	DowntownDC BID		DC Metro Region		DowntownDC BID as Percent of Region Total
	Number	Percent	Number	Percent	Percent
Industries	**168,820**	**100%**	**2,317,630**	**100%**	**7%**
Public Administration	67,140	40%	572,600	25%	12%
Federal	61,820	-	362,820	-	17%
Local/State	5,300	-	209,760	-	3%
Professional, Scientific, and Technical Services	34,960	21%	416,410	18%	8%
Other Services [except Public Administration	19,890	12%	135,330	6%	15%
Accommodation and Food Services	15,600	9%	163,870	7%	10%
Accommodation	5,590	-	39,830	-	14%
Food Service	10,010	-	124,040	-	8%
Administrative and Support and Waste Management and Remediation Services	8,050	5%	143,540	6%	6%
Information	6,480	4%	67,980	3%	10%
Finance and Insurance	4,310	3%	69,310	3%	6%
Real Estate and Rental and Leasing	2,000	1%	40,840	2%	5%
Construction	1,270	1%	81,320	4%	2%
Health Care and Social Assistance	2,290	1%	205,670	9%	1%
Retail Trade	1,460	1%	169,560	7%	1%
Arts, Entertainment, and Recreation	2,530	1%	26,020	1%	10%
Wholesale Trade	680	0%	45,890	2%	1%
Educational Services	890	1%	71,640	3%	1%
Management of Companies and Enterprises	610	0%	34,570	1%	2%
Utilities	300	0%	5,270	0%	6%
Manufacturing	260	0%	35,120	2%	1%
Transportation and Warehousing	100	0%	31,300	1%	0%
Agriculture, Forestry, Fishing and Hunting	0	0%	740	0%	0%
Mining, Quarrying, and Oil and Gas Extraction	0	0%	650	0%	0%

Source: ESI estimate, using BLS and LEHD Data (2021, 2019 and 2010). Industries are based on 2-digit NAICS codes except where additional level of detail is provided to distinguish between federal and state and local public sector jobs, and between accommodation and food service.

Worker Industries – DowntownDC BID, DC, and Region



Source: ESI estimate, using BLS and LEHD Data (2021, 2019 and 2010)

Worker Demographics, 2019

Demographic Characteristics of Workers Based on Job Location (2019)										
	DowntownDC BID		District of Columbia		Northern VA		Suburban MD		DC Metro Region	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Total Number of Jobs	**175,950**		**688,070**		**932,710**		**823,480**		**2,444,270**	
Age										
Ages 29 or Younger	30,020	17%	130,670	19%	190,470	20%	163,250	20%	484,380	20%
Ages 30 to 54	105,860	60%	398,160	58%	531,030	57%	445,500	54%	1,374,690	56%
Ages 55 or Older	40,070	23%	159,250	23%	211,220	23%	214,730	26%	585,200	24%
Race and Ethnicity										
White	100,030	57%	360,010	52%	597,830	64%	452,520	55%	1,410,350	58%
Black or African American	55,580	32%	250,400	36%	171,810	18%	264,130	32%	686,340	28%
American Indian or Alaska Native	820	0%	3,600	1%	4,490	0%	4,610	1%	12,710	1%
Asian	14,380	8%	55,180	8%	133,950	14%	83,500	10%	272,640	11%
Native Hawaiian or Other Pacific Islander	240	0%	1,020	0%	1,250	0%	1,030	0%	3,290	0%
Hispanic or Latino	16,230	9%	69,210	10%	117,620	13%	103,740	13%	290,560	12%
Annual Income										
$15,000 or less	12,840	7%	77,210	11%	88,430	9%	89,330	11%	249,270	10%
$15,001-$40,000	20,910	12%	124,540	18%	140,680	15%	144,910	18%	404,030	17%
More than $40,000	142,200	81%	486,330	71%	188,210	20%	173,740	21%	493,930	20%

Source: U.S. Census Bureau, LEHD Data (2019)

Worker Demographics, 2010

Demographic Characteristics of Workers Based on Job Location (2010)	DowntownDC BID		District of Columbia		Northern VA		Suburban MD		DC Region	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Total Number of Jobs	**162,350**		**621,520**		**847,380**		**780,630**		**2,249,540**	
Age										
Ages 29 or Younger	36,720	23%	148,260	24%	190,690	23%	174,300	22%	513,250	23%
Ages 30 to 54	91,660	56%	340,080	55%	501,380	59%	445,020	57%	1,286,480	57%
Ages 55 or Older	33,970	21%	133,190	21%	155,310	18%	161,310	21%	449,810	20%
Race and Ethnicity										
White	111,020	68%	416,640	67%	599,180	71%	494,580	63%	1,510,410	67%
Black or African American	37,600	23%	150,510	24%	135,800	16%	203,230	26%	489,540	22%
American Indian or Alaska Native	1,360	1%	5,520	1%	4,130	0%	4,220	1%	13,860	1%
Asian	9,220	6%	37,150	6%	93,000	11%	65,130	8%	195,270	9%
Native Hawaiian or Other Pacific Islander	380	0%	1,590	0%	1,400	0%	1,390	0%	4,370	0%
Hispanic or Latino	13,730	8%	57,960	9%	92,080	11%	78,880	10%	228,910	10%
Annual Income										
$15,000 or less	12,800	8%	75,950	12%	63,680	8%	72,270	9%	202,720	9%
$15,001-$40,000	26,470	16%	130,690	21%	112,540	13%	129,040	17%	352,080	16%
More than $40,000	123,080	76%	414,880	67%	165,050	19%	163,670	21%	445,630	20%

Source: U.S. Census Bureau, LEHD Data (2019)

DowntownDC BID Workforce Analysis

The following pages include an analysis of workers employed within the DowntownDC BID, broken down by location of residence. The data was pulled using the same boundaries identified for the commuter shed, as well as DC Wards.

The employment analysis includes data for all jobs from 2019:

- **Total jobs**
- **Age of Workers**
- **Wages of Workers**
- **Workers by industry classification (NAICS Code)**
- **Workers by residence (Home census block or ward of the worker)**



DowntownDC BID Workforce by Area of Residence within Region

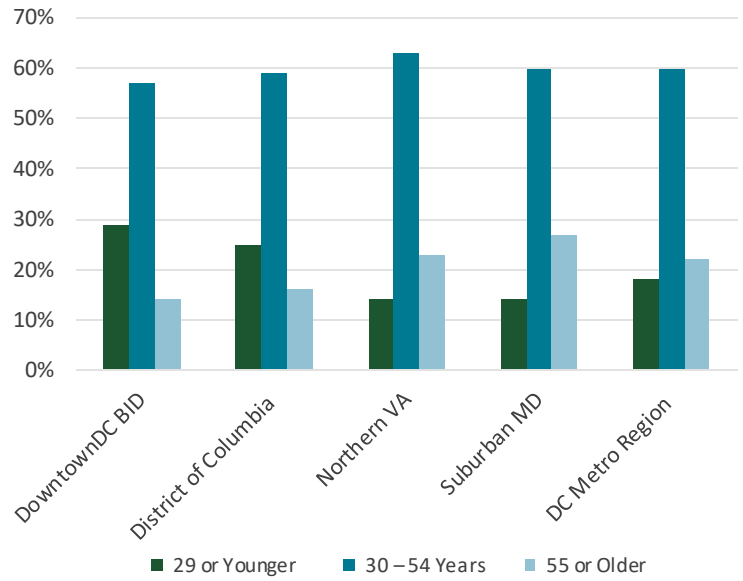
The chart below details various workforce metrics of the individuals employed within the DowntownDC BID, organized by the location of their residence.

Demographic Characteristics of Job Holders Employed in DowntownDC BID

2019 Civilian Population 16+ in Labor Force

	DowntownDC BID		District of Columbia		Northern VA		Suburban MD		DC Metro Region	
Age of Workers	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
29 or Younger	560	29%	13,730	25%	5,930	14%	7,410	14%	27,070	18%
30 – 54 Years	1,080	57%	32,790	59%	26,210	63%	32,250	60%	91,240	60%
55 or Older	260	14%	8,980	16%	9,720	23%	14,530	27%	33,230	22%
Annual Income										
$15,000 or less	100	5%	5,340	10%	1,760	4%	4,500	8%	11,600	8%
$15,001-$40,000	190	10%	8,590	15%	2,980	7%	7,870	15%	19,440	13%
More than $40,000	1,610	85%	41,570	75%	37,120	89%	41,810	77%	120,500	80%
By Industry										
Jobs in Goods Producing Sectors	10	0%	630	1%	480	1%	930	2%	2,040	1%
Jobs in Trade, Transportation, and Utilities	50	3%	2,120	4%	1,010	2%	2,110	4%	5,230	3%
Jobs in All other services industry sectors	1,850	97%	52,760	95%	40,370	96%	51,140	94%	144,260	95%
Total Jobs	1,900	100%	55,500	100%	41,860	100%	54,180	100%	151,530	100%

Comparison: Age of Workers by Residence



Source: U.S. Census Bureau LEHD Origin-Destination Data (2019)

DowntownDC BID Workforce by Area of Residence within DC

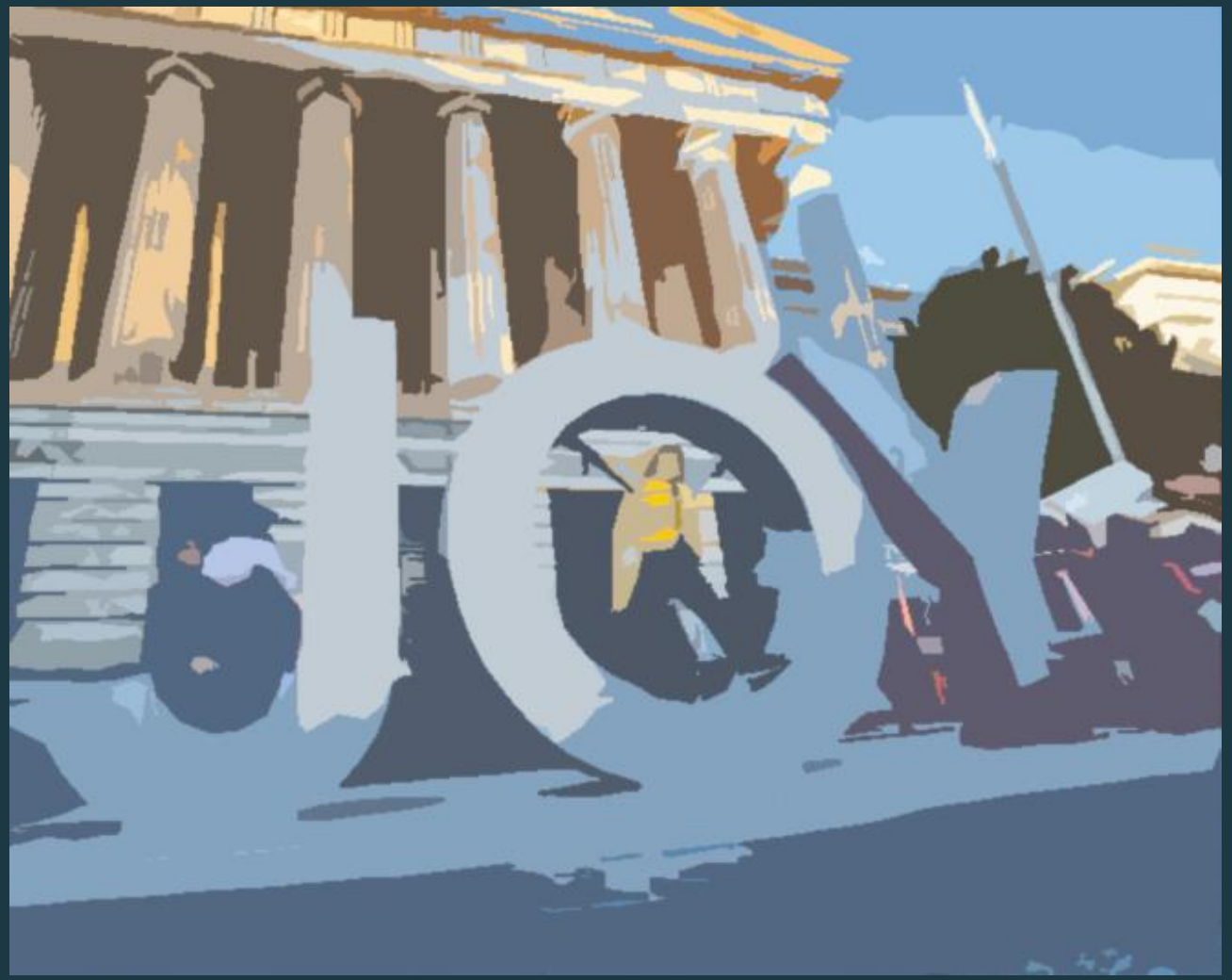
The table below details various workforce metrics of the individuals employed within the DowntownDC BID, organized by the location of their residence. This dataset is not available for 2021 and cannot be projected forward because of a lack of data availability.

Residence of All Job Holders Employed in DowntownDC BID and Living in DC

2019 Civilian Population 16+ in Labor Force

	Ward 1		Ward 2		Ward 3		Ward 4		Ward 5		Ward 6		Ward 7		Ward 8		DC Total	
Workers Age	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
29 or Younger	2,680	30%	2,170	31%	1,040	19%	1,130	17%	1,610	23%	3,010	27%	1,020	22%	1,070	25%	13,730	25%
30 - 54 Years	5,200	59%	3,910	55%	3,230	59%	4,310	63%	4,240	61%	6,930	61%	2,640	56%	2,330	55%	32,790	59%
55 or Older	990	11%	1,020	14%	1,230	22%	1,360	20%	1,120	16%	1,380	12%	1,050	22%	830	20%	8,980	16%
Annual Income																		
$15,000 or less	640	7%	390	5%	330	6%	710	11%	760	11%	710	6%	860	18%	930	22%	5,330	10%
$15,001-$40,000	1,240	14%	590	8%	420	8%	1,420	21%	1,240	18%	1,030	9%	1,280	27%	1,360	32%	8,580	15%
More than $40,000	6,970	79%	6,130	86%	4,750	86%	4,660	69%	4,970	71%	9,590	85%	2,570	55%	1,930	46%	41,570	75%
Employment Sectors																		
Jobs in Goods Producing Sectors	100	1%	50	1%	30	1%	110	2%	70	1%	80	1%	100	2%	90	2%	630	1%
Jobs in Trade, Transportation, and Utilities	270	3%	200	3%	200	4%	260	4%	300	4%	380	3%	220	5%	290	7%	2,120	2%
Jobs in All other services industry sectors	8,490	96%	6,850	97%	5,270	96%	6,420	94%	6,610	95%	10,860	96%	4,400	93%	3,860	91%	52,760	48%
Total Jobs	8,860	100%	7,100	100%	5,500	100%	6,800	100%	6,970	100%	11,330	100%	4,720	100%	4,230	100%	55,510	50%
Percent of Jobs by Ward*	**16%**		**13%**		**10%**		**12%**		**13%**		**20%**		**8%**		**8%**		**100%**	

Source: U.S. Census Bureau LEHD Origin-Destination Data (2019)



Residential Analysis

In addition to understanding where workers are employed, it is important to understand where workers live. Insight into the residential clustering of various groups of individuals is essential to tracking future economic and market trends.

The analysis includes data for 2010 and 2019 for job holders organized by their residence and is segmented by the following:

- **Total jobs**
- **Demographic characteristics of workers**
- **Workers by industry classification (NAICS Code)**
- **Workers by residence (Home census block of the worker)**
- **Change from 2010 – 2019**

Unlike in the section outlining jobs in these geographies, limited data means that it is not possible to reliably report data on resident workers to 2021.

Resident Worker Demographics, 2019

Demographic Characteristics of Workers Based on Residence (2019)										
	DowntownDC BID		District of Columbia		Northern VA		Suburban MD		DC Metro Region	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Total Number of Jobs	**4,890**		**319,860**		**745,070**		**931,330**		**1,996,260**	
Age										
Ages 29 or Younger	1,570	32%	82,380	26%	158,250	21%	184,430	20%	425,060	21%
Ages 30 to 54	2,580	53%	179,320	56%	413,370	55%	506,580	54%	1,099,260	55%
Ages 55 or Older	740	15%	58,160	18%	173,460	23%	240,320	26%	471,930	24%
Race and Ethnicity										
White	3,330	68%	168,010	53%	494,230	66%	423,500	45%	1,085,740	54%
Black or African American	780	16%	124,130	39%	102,180	14%	385,150	41%	611,460	31%
American Indian or Alaska Native	20	0%	1,560	0%	3,800	1%	5,340	1%	10,700	1%
Asian	610	12%	18,110	6%	124,310	17%	95,140	10%	237,560	12%
Native Hawaiian or Other Pacific Islander	10	0%	430	0%	1,030	0%	1,310	0%	2,770	0%
Hispanic or Latino	430	9%	30,770	10%	99,900	13%	130,970	14%	261,650	13%
Annual Income										
$15,000 or less	510	10%	49,090	15%	118,530	16%	161,140	17%	328,760	16%
$15,001-$40,000	650	13%	71,950	22%	151,830	20%	243,270	26%	467,050	23%
More than $40,000	3,730	76%	198,820	62%	474,710	64%	526,910	57%	1,200,450	60%

Source: U.S. Census Bureau, LEHD Data (2010)

Resident Worker Demographics, 2010

Demographic Characteristics of Workers Based on Residence (2010)										
	DowntownDC BID		District of Columbia		Northern VA		Suburban MD		DC Metro Region	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Total Number of Jobs	**4,890**		**319,860**		**692,910**		**857,990**		**1,817,010**	
Age										
Ages 29 or Younger	1,570	32%	82,380	26%	165,680	24%	200,210	23%	437,460	24%
Ages 30 to 54	2,580	53%	179,320	56%	388,940	56%	478,430	56%	1,008,940	56%
Ages 55 or Older	740	15%	58,160	18%	138,290	20%	179,360	21%	370,610	20%
Race and Ethnicity										
White	3,330	68%	168,010	53%	502,190	72%	493,920	58%	1,167,620	64%
Black or African American	780	16%	124,130	39%	85,310	12%	268,900	31%	427,890	24%
American Indian or Alaska Native	20	0%	1,560	0%	4,040	1%	5,360	1%	11,520	1%
Asian	610	12%	18,110	6%	88,150	13%	74,370	9%	176,440	10%
Native Hawaiian or Other Pacific Islander	10	0%	430	0%	1,320	0%	1,640	0%	3,650	0%
Hispanic or Latino	430	9%	30,770	10%	82,930	12%	99,200	12%	207,950	11%
Annual Income										
$15,000 or less	510	10%	49,090	15%	116,550	17%	163,640	19%	327,810	18%
$15,001-$40,000	650	13%	71,950	22%	162,770	23%	244,920	29%	481,580	27%
More than $40,000	3,730	76%	198,820	62%	413,590	60%	449,440	52%	1,007,610	55%

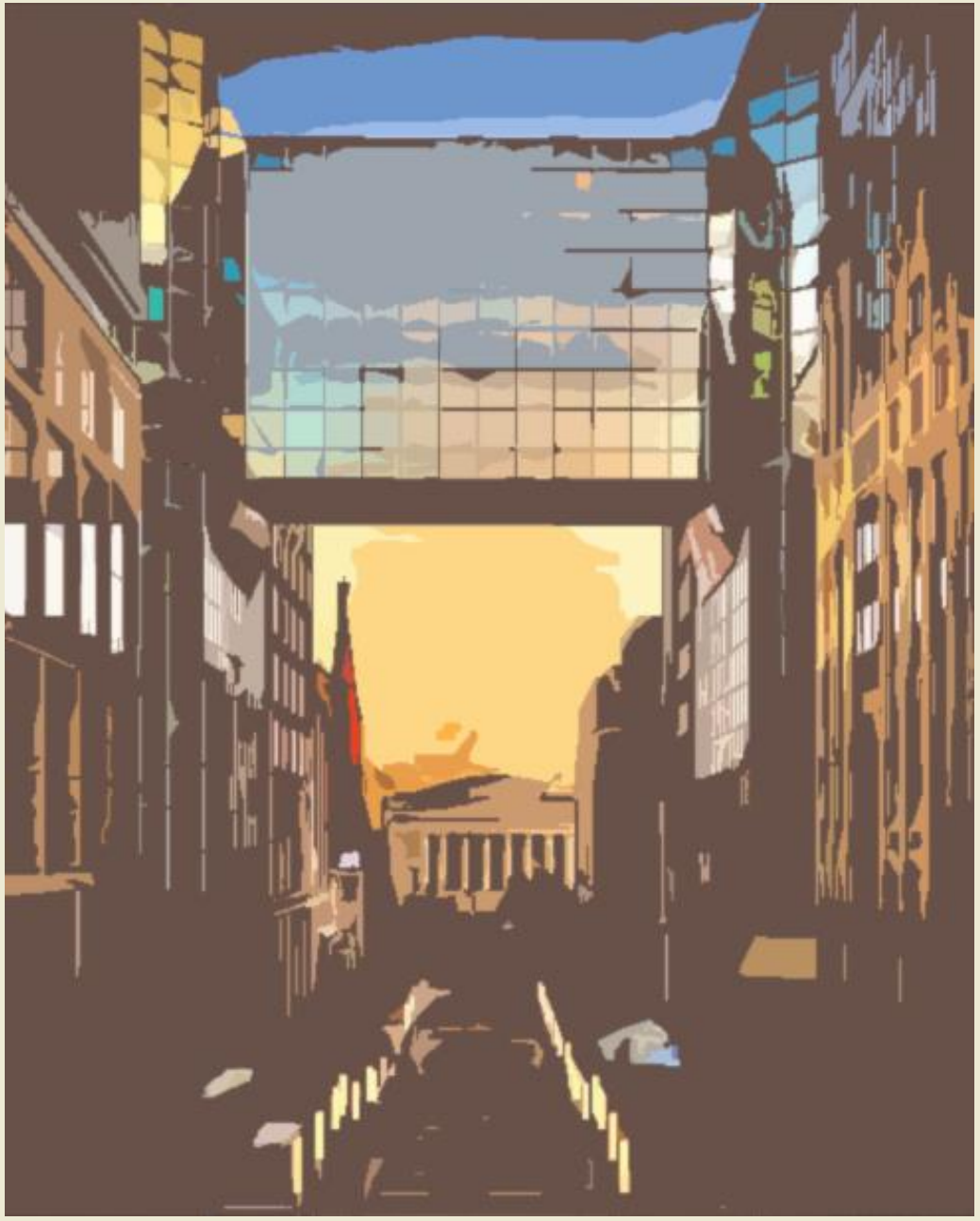
Source: U.S. Census Bureau, LEHD Data (2010)

DowntownDC BID Commuter Shed

In addition to understanding where workers are employed, it is important to understand the characteristics of potential workers for business located in and available to work in the DowntownDC BID.

The following charts benchmark the Downtown DC Commuter Shed against the DowntownDC BID, the District of Columbia and relevant suburban markets in MD and VA. We examined traditional metrics included in a labor shed analysis (income, education, age) as well as soft indicators that provide insight into the labor force's stability (household data, owner occupied/renter, children etc.).

The latter metrics are often used by site selectors to make predictions on stability of the local labor force. The "DC Metro Region" includes Washington DC and Arlington County, Fairfax County, the cities of Alexandria, Fairfax, and Falls Church in Virginia, and Montgomery County and Prince George's County in Maryland.



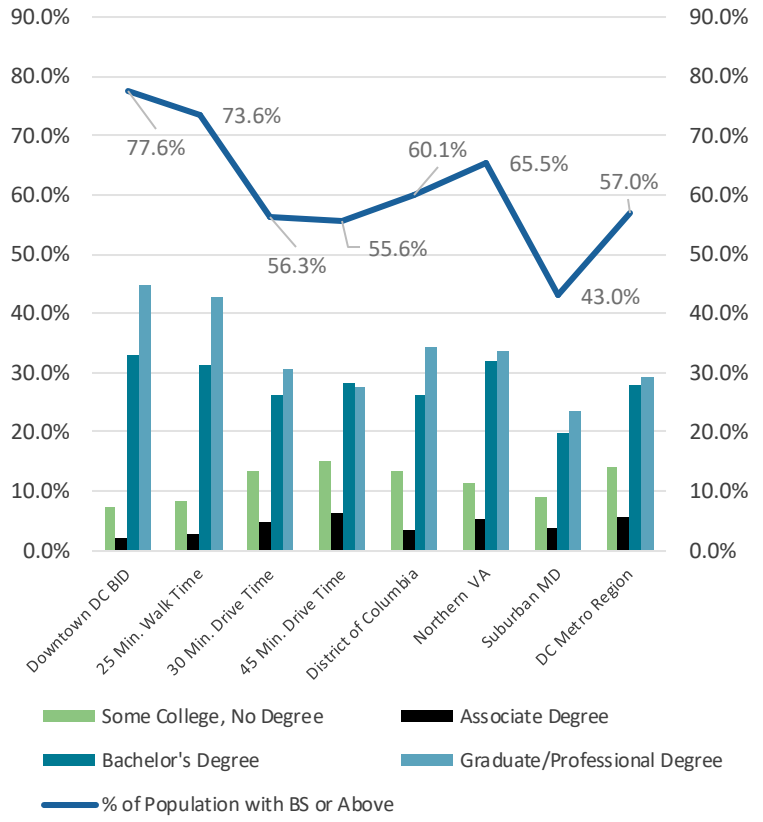
Commuter Shed - Population

Commuter Shed Comparison: 2021 Population

	DowntownDC BID	District of Columbia	25 Min. Walk	30 Min. Drive	45 Min. Drive	Northern VA	Suburban MD	DC Metro Region
Population								
2000 Total Population	5,067	572,059	33,748	2,020,007	3,922,391	1,319,447	1,674,856	4,178,991
2010 Total Population	8,698	601,723	41,800	2,144,553	4,351,079	1,464,216	1,835,197	4,733,917
2021 Total Population	10,290	705,054	60,308	2,344,860	4,750,972	1,568,147	1,936,774	5,237,769
2026 Total Population	10,708	755,051	67,175	2,452,722	4,959,534	1,618,314	1,996,452	5,496,400
2021-2026 Annual Rate of Change	0.80%	1.38%	2.18%	0.90%	0.86%	0.32%	0.31%	0.97%
2021 Total Daytime Population	99,551	927,615	226,586	2,589,954	4,978,167	1,644,466	1,856,935	5,446,736
Workers	96,857	626,833	209,624	1,551,351	2,806,364	951,711	941,001	3,031,403
Residents	2,694	300,782	16,962	1,038,603	2,171,803	692,755	915,934	2,415,333
Median Age								
2010	33.0	33.9	32.9	34.9	35.8	-	-	36.3
2021	35.0	36.0	35.1	37.1	37.8	-	-	38.2
2026	36.5	36.9	35.5	37.8	38.4	-	-	38.9
Ethnicity/Race								
White Alone	66.0%	42.6%	54.4%	44.2%	45.7%	59.1%	35.6%	48.7%
Black Alone	10.7%	43.8%	25.3%	33.5%	29.3%	11.2%	39.2%	26.2%
American Indian Alone	0.2%	0.4%	0.4%	0.4%	0.4%	0.3%	0.5%	0.4%
Asian Alone	17.0%	4.5%	11.0%	8.9%	11.9%	17.7%	10.3%	13.0%
Pacific Islander Alone	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%
Hispanic Origin	9.5%	11.7%	12.3%	18.4%	18.1%	16.9%	21.0%	16.7%
Educational Attainment								
Some College/No Degree/Associate Degree	8.4%	16.6%	10.7%	18.0%	19.8%	16.5%	12.9%	19.5%
Bachelor's Degree	32.9%	26.0%	31.0%	26.0%	26.9%	31.9%	19.5%	27.9%
Graduate/Professional Degree	44.7%	34.1%	42.6%	30.3%	28.4%	33.6%	23.5%	29.1%
% of Population with BS or Above	77.6%	60.1%	73.6%	56.3%	55.3%	65.5%	43.0%	57.0%

Source: ESRI Business Analyst (2022)

Comparison: Educational Attainment 2021



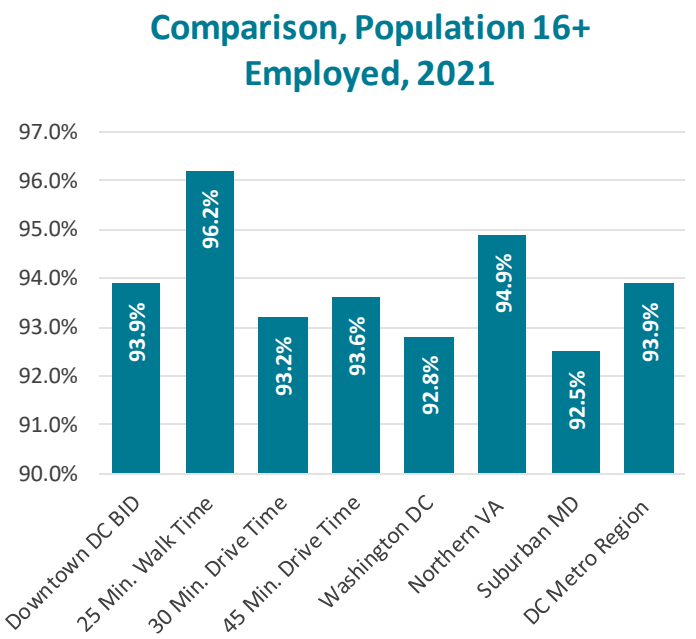
Commuter Shed - Industry & Occupation

DowntownDC has a better educated potential workforce than the region and the District overall, using the commuter shed geographies. The difference increases the greater the distance from downtown, most notably when compared to the Metro Region and Suburban MD.

Commuter Shed Comparison: 2021 Employment by Industry & Occupation

	DowntownDC BID	District of Columbia	25 Min. Walk	30 Min. Drive	45 Min. Drive	Northern VA	Suburban MD	DC Metro Region
2021 Civilian Population 16+ in Labor Force								
Civilian Population 16+	8,011	431,297	44,802	1,393,933	2,726,475	910,441	1,106,055	2,992,276
Population 16+ Employed	93.9%	92.8%	96.2%	93.2%	93.6%	94.9%	92.5%	93.9%
Population 16+ Unemployment Rate	6.1%	7.2%	3.8%	6.8%	6.4%	5.1%	7.5%	6.1%
By Select Industry								
Total	**7,520**	**400,424**	**43,094**	**1,299,099**	**2,551,959**	**865,422**	**1,023,021**	**2,808,668**
Retail Trade	2.1%	4.1%	2.6%	5.8%	6.8%	6.3%	7.4%	6.7%
Transportation/Utilities	1.0%	2.8%	1.9%	3.8%	4.2%	3.3%	4.9%	3.9%
Information	4.5%	3.3%	4.2%	2.4%	2.2%	2.3%	1.8%	2.3%
Finance/Insurance/Real Estate	10.0%	6.7%	7.9%	6.5%	6.5%	7.1%	6.0%	6.6%
Services	58.1%	60.1%	61.6%	57.1%	56.2%	58.1%	54.8%	56.7%
Public Administration	22.1%	18.4%	18.9%	15.8%	14.8%	13.9%	13.9%	13.9%
By Occupation								
White Collar	92.5%	83.2%	88.7%	75.5%	75.5%	79.8%	70.4%	76.5%
Management/Business/Financial	37.9%	30.8%	36.0%	26.4%	25.5%	28.5%	21.8%	25.9%
Professional	45.9%	39.1%	43.0%	34.7%	34.5%	37.1%	32.1%	35.3%
Sales	3.0%	5.2%	4.2%	5.9%	6.5%	6.5%	6.5%	6.5%
Administrative Support	5.7%	8.1%	5.5%	8.5%	8.9%	7.7%	9.9%	8.8%
Services	5.5%	10.9%	7.7%	13.2%	12.9%	11.0%	14.9%	12.3%
Blue Collar	2.0%	6.0%	3.6%	11.3%	11.6%	9.2%	14.7%	11.1%

Source: ESRI Business Analyst (2022)

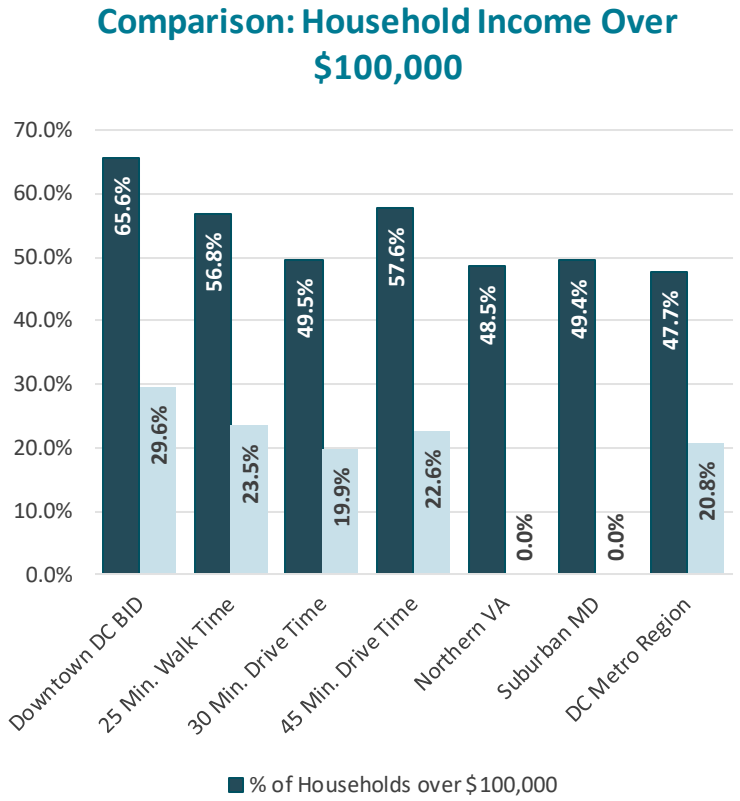


Commuter Shed - Household Characteristics

Commuter Shed Comparison: 2021 Household Characteristics

	DowntownDC BID	District of Columbia	25 Min. Walk	30 Min. Drive	45 Min. Drive	Northern VA	Suburban MD	DC Metro Region
Household Income								
2021 Median Household Income	$120,957	$93,516	$112,372	$98,893	$105,259	-	-	$108,720
2026 Median Household Income	$134,574	$106,262	$126,006	$107,443	$113,431	-	-	$117,699
% of Households over $100,000	65.6%	47.7%	56.8%	49.5%	52.2%	48.5%	49.4%	54.7%
% of Households over $200,000	29.6%	20.7%	23.5%	19.9%	20.9%	26.1%	17.7%	22.4%
2021 Population 15+ by Marital Status								
Never Married	58.3%	56.5%	62.5%	45.9%	39.7%	35.2%	37.9%	38.1%
Married	31.1%	32.3%	27.6%	41.5%	47.5%	53.2%	48.0%	49.3%
Widowed	2.9%	3.0%	2.2%	3.9%	4.1%	3.9%	4.9%	4.2%
Divorced	7.8%	8.2%	7.8%	8.7%	8.7%	7.7%	9.1%	8.4%
2021 Housing Unit Summary								
2021 Housing Units	7,089	341,708	34,734	1,036,369	1,931,430	642,011	745,387	2,097,585
Owner Occupied Housing Units	22.6%	37.6%	24.9%	45.7%	55.6%	56.6%	61.0%	58.3%
Renter Occupied Housing Units	64.6%	53.5%	69.0%	46.9%	38.2%	38.9%	32.5%	35.8%
Vacant Housing Units	12.8%	8.9%	6.1%	7.4%	6.2%	4.5%	6.6%	5.8%
Household Summary 2010 Unless Noted								
Total	**5,233**	**266,707**	**23,467**	**873,871**	**1,658,893**	**571,207**	**661,128**	**1,793,174**
Households with 1 Person	62.5%	44.0%	56.2%	35.4%	29.5%	28.5%	25.5%	28.4%
Households with 2+ People	37.5%	56.0%	43.8%	64.6%	70.5%	71.6%	74.5%	71.6%
H & W Family HHs w Related Children	3.0%	8.6%	4.2%	16.3%	21.8%	25.1%	23.5%	23.2%
All Households with Children	4.1%	20.7%	10.1%	27.4%	32.6%	32.8%	36.2%	33.4%
Nonfamily Households	18.3%	13.7%	18.7%	10.8%	8.6%	8.9%	6.7%	8.2%
2021 Average Household Size	1.5	2.1	1.8	2.4	2.6	2.5	2.7	2.6
2021 Average Family Size	2.4	3.1	2.8	3.2	3.2	3.2	3.3	3.2

Source: ESRI Business Analyst (2022)



SWOT: Strengths, Weaknesses, Opportunities & Threats



The DowntownDC BID's Competitive Position

The consulting team conducted several interviews with DowntownDC BID board members, local stakeholders and employers. We also conducted a simple survey related to the status of employment in their own companies. The participation rate for both these exercises was limited. Both the interviews and the surveys presented several consistent messages, which align with recent research and market intelligence about leasing, hiring, doing business in DC, and downtown as a destination for work and play.

The information and messages are summarized into a SWOT analysis—the strengths, weaknesses, opportunities and threats— as they relate to Downtown DC's competitive position as a location for employment.

DowntownDC BID's Competitive Position SWOT

Strengths

- Downtown is vibrant, with a strong mix of events (Holiday Market)
- Downtown remains an attractive, compelling place to live & work
- Attracting talent is fairly easy
- Exceptional amenities (dining, sports, entertainment, cultural uses and open space)
- DC still known as a place where people come "to make a difference"
- Economy has become more diverse over past two decades
- High level jobs are returning to the office (Deloitte Keystrokes)
- Trophy properties holding value and remain competitive, including on lease rates (1200 NY Avenue and City Center)
- High-end restaurants and luxury tenants are doing well
- Access to highly educated workforce, valuable in attracting tenants and investment
- Alternatives for transportation (transit, bikes, scooter, auto)
- Powerful placemaking activities (Franklin Park, Holiday Market, NY Ave Sculpture program)

Weaknesses

- Market fundamentals are shifting, increase in rent abatements (18+ mos.) and construction budgets to attract and retain tenants
- Rents for new space just outside of DC are comparable to older space in the core with exception of trophy space. Average rent in downtown is $58/SF (similar to Class A space in NoVa). New space in DC is $90/SF and $60/sf in Tysons.
- Companies are cutting their footprints, upward of 50%
- Hybrid work environment, thus fewer people on the street
- Loss of retail and service businesses resulting in retail vacancy
- Crime and the perception of crime is impacting hiring and business attraction
- Homelessness appears to have increased Downtown, not as evident in competitive markets
- Quality of DC Public Schools is poor; charter schools are considered ok, but not competitive to schools in surrounding jurisdictions
- Cost of doing business is high, impacting tenant and corporate attraction (commuting, DC licenses, permits and approvals, and taxes) which results in higher rents

DowntownDC BID's Competitive Position SWOT

Opportunities

- Vacancy creating opportunities to trade up, even secure higher profile space
- Conversion of commercial buildings to residential ones. Four projects have been approved to date and there are others under consideration. This will enhance residential base downtown
- The green building code and local commitment to sustainability, has strong appeal
- Rethink how to reposition and think about retail and amenities
- Leverage existing relationships with partners such as National Park Service and WDCEP
- Focus on how to help businesses grow and stay in downtown (funding, tools etc.)
- Expansion of Metro opens access to greater pool of talent, including younger talent.
- Redesign of existing commercial space to include more flexible space and users
- Increase in co-working space (landlord and tenant sponsored) create an opportunity to attract and incubate companies and move them to larger spaces

Threats

- Rising commercial vacancy rate, highest in over 20 years
- Increasing competition for office space in NoVa and DC submarkets
- Suburban markets are ramping up, with amenities (Reston Town Center, near Amazon HQ2)
- Federal workforce slow to return and some jobs relocating outside of DC
- Metro & public transit operating on a more limited schedule, impacting hiring and current workforce, especially lower skilled employees
- Growth and acceptance of work from home environment impacting daytime traffic
- Cost of living is high (housing, food, etc.) impacting certain sectors especially hospitality
- Rising labor costs is impacting pricing at restaurants and groceries
- Lack of a tech eco system (including secondary education tracks) or a cluster
- Lack of tech talent living and working in DC (majority live in Fairfax and Loudoun—JLL)
- Many companies leave DC for suburbs once they have established a customer base (5 years is perception)
- Young companies/professionals leave when their children are school age

Appendix





Worker Industries - 2021

Workers by Industry, All Geographies (2021 Estimate)

	Downtown DC		District of Columbia		Suburban VA		Suburban MD		Metro Region	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Industries	**177,680**	**100%**	**743,100**	**100%**	**887,630**	**100%**	**742,900**	**100%**	**2,373,630**	**100%**
Public Administration	66,150	37%	248,400	33%	146,670	17%	180,410	24%	575,480	24%
Federal Government	60,930	-	205,670	-	68,930	-	79,350	-	353,950	-
Local Government	5,220	-	42,730	-	77,740	-	101,060	-	221,530	-
Professional, Scientific, and Technical Services	42,380	24%	109,210	15%	224,200	25%	85,190	11%	418,600	18%
Other Services (except Public Administration)	22,710	13%	66,810	9%	40,860	5%	31,550	4%	139,220	6%
Accommodation and Food Services	10,580	6%	63,810	9%	66,800	8%	58,260	8%	188,870	8%
Accommodation	2,230	-	10,470	-	10,960	-	7,660	-	29,090	-
Food Services	8,350	-	53,340	-	55,840	-	50,600	-	159,780	-
Administrative and Support and Waste Management and Remediation Services	9,220	5%	43,280	6%	62,510	7%	46,700	6%	152,490	6%
Information	6,220	4%	18,470	2%	26,910	3%	12,680	2%	58,060	2%
Finance and Insurance	3,900	2%	13,670	2%	32,420	4%	20,570	3%	66,660	3%
Real Estate and Rental and Leasing	2,770	2%	11,700	2%	14,280	2%	15,690	2%	41,670	2%
Construction	2,550	1%	14,180	2%	28,080	3%	48,140	6%	90,400	4%
Health Care and Social Assistance	2,530	1%	65,060	9%	75,500	9%	87,170	12%	227,730	10%
Retail Trade	2,280	1%	21,060	3%	70,230	8%	71,580	10%	162,870	7%
Arts, Entertainment, and Recreation	1,950	1%	9,780	1%	11,290	1%	9,960	1%	31,030	1%
Wholesale Trade	1,380	1%	4,600	1%	18,090	2%	16,890	2%	39,580	2%
Educational Services	1,350	1%	44,750	6%	17,240	2%	15,220	2%	77,210	3%
Management of Companies and Enterprises	1,150	1%	2,490	0%	24,420	3%	8,220	1%	35,130	1%
Utilities	230	0%	2,040	0%	1,570	0%	1,270	0%	4,880	0%
Manufacturing	190	0%	1,220	0%	8,110	1%	17,730	2%	27,060	1%
Transportation and Warehousing	140	0%	2,550	0%	18,070	2%	14,740	2%	35,360	1%
Agriculture, Forestry, Fishing and Hunting	0	0%	30	0%	120	0%	820	0%	970	0%
Mining, Quarrying, and Oil and Gas Extraction	0	0%	0	0%	250	0%	100	0%	350	0%

Source: ESI estimate, using BLS and LEHD Data (2021, 2019 and 2010)

Worker Industries - 2019

Workers by Industry, All Geographies (2019 Estimate)

	Downtown DC		District of Columbia		Suburban VA		Suburban MD		Metro Region	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Industries	190,990	100%	797,200	100%	927,260	100%	794,670	100%	2,519,130	100%
Public Administration	64,700	34%	242,950	30%	148,840	16%	180,750	23%	572,540	23%
Federal Government	59,590	-	200,550	-	67,120	-	74,030	-	341,700	-
Local Government	5,110	-	42,400	-	81,720	-	106,720	-	230,840	-
Professional, Scientific, and Technical Services	42,500	22%	122,360	15%	235,540	25%	92,980	12%	450,880	18%
Other Services (except Public Administration)	24,420	13%	74,850	9%	42,930	5%	34,430	4%	152,210	6%
Accommodation and Food Services	19,740	10%	71,490	9%	70,180	8%	63,590	8%	205,260	8%
Accommodation	5,660	-	16,270	-	15,970	-	10,120	-	42,360	-
Food Services	14,080	-	55,220	-	54,210	-	53,470	-	162,900	-
Administrative and Support and Waste Management and Remediation Services	10,430	5%	48,490	6%	65,670	7%	50,970	6%	165,130	7%
Information	6,380	3%	20,700	3%	28,270	3%	13,840	2%	62,810	2%
Finance and Insurance	4,090	2%	15,320	2%	34,060	4%	22,450	3%	71,830	3%
Real Estate and Rental and Leasing	2,910	2%	13,110	2%	15,000	2%	17,120	2%	45,230	2%
Construction	2,530	1%	15,880	2%	29,490	3%	52,540	7%	97,910	4%
Health Care and Social Assistance	2,650	1%	72,890	9%	79,310	9%	95,140	12%	247,340	10%
Retail Trade	2,650	1%	23,600	3%	73,780	8%	78,120	10%	175,500	7%
Arts, Entertainment, and Recreation	3,370	2%	10,960	1%	11,860	1%	10,880	1%	33,700	1%
Wholesale Trade	1,360	1%	5,150	1%	19,000	2%	18,440	2%	42,590	2%
Educational Services	1,480	1%	50,140	6%	18,110	2%	16,610	2%	84,860	3%
Management of Companies and Enterprises	1,110	1%	2,790	0%	25,660	3%	8,970	1%	37,420	1%
Utilities	240	0%	2,290	0%	1,650	0%	1,390	0%	5,330	0%
Manufacturing	230	0%	1,360	0%	8,520	1%	19,350	2%	29,230	1%
Transportation and Warehousing	200	0%	2,850	0%	18,990	2%	16,090	2%	37,930	2%
Agriculture, Forestry, Fishing and Hunting	0	0%	40	0%	120	0%	890	0%	1,050	0%
Mining, Quarrying, and Oil and Gas Extraction	0	0%	0	0%	260	0%	110	0%	370	0%

Source: ESI estimate, using BLS and LEHD Data (2021, 2019 and 2010)

Worker Industries - 2010

Workers by Industry, All Geographies (2010 Estimate)

	Downtown DC		District of Columbia		Suburban VA		Suburban MD		Metro Region	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Industries	168,820	100%	712,200	100%	864,450	100%	740,980	100%	2,317,630	100%
Public Administration	67,140	40%	252,050	35%	150,450	17%	170,100	23%	572,600	25%
Federal Government	61,820	-	216,340	-	74,020	-	72,460	-	362,820	-
Local Government	5,300	-	35,690	-	76,430	-	97,640	-	209,760	-
Professional, Scientific, and Technical Services	34,960	21%	107,750	15%	218,670	25%	89,990	12%	416,410	18%
Other Services (except Public Administration)	19,890	12%	64,600	9%	40,970	5%	29,760	4%	135,330	6%
Accommodation and Food Services	15,600	9%	54,920	8%	57,470	7%	51,480	7%	163,870	7%
Accommodation	5,590	-	15,960	-	16,700	-	7,170	-	39,830	-
Food Services	10,010	-	38,960	-	40,770	-	44,310	-	124,040	-
Administrative and Support and Waste Management and Remediation Services	8,050	5%	41,500	6%	53,230	6%	48,810	7%	143,540	6%
Information	6,480	4%	19,990	3%	31,590	4%	16,400	2%	67,980	3%
Finance and Insurance	4,310	3%	13,310	2%	30,530	4%	25,470	3%	69,310	3%
Real Estate and Rental and Leasing	2,000	1%	10,200	1%	15,270	2%	15,370	2%	40,840	2%
Construction	1,270	1%	10,200	1%	28,320	3%	42,800	6%	81,320	4%
Health Care and Social Assistance	2,290	1%	57,220	8%	64,970	8%	83,480	11%	205,670	9%
Retail Trade	1,460	1%	19,300	3%	72,250	8%	78,010	11%	169,560	7%
Arts, Entertainment, and Recreation	2,530	1%	7,950	1%	9,010	1%	9,060	1%	26,020	1%
Wholesale Trade	680	0%	4,710	1%	19,700	2%	21,480	3%	45,890	2%
Educational Services	890	1%	40,520	6%	18,520	2%	12,600	2%	71,640	3%
Management of Companies and Enterprises	610	0%	2,380	0%	23,070	3%	9,120	1%	34,570	1%
Utilities	300	0%	2,200	0%	1,990	0%	1,080	0%	5,270	0%
Manufacturing	260	0%	1,210	0%	12,730	1%	21,180	3%	35,120	2%
Transportation and Warehousing	100	0%	2,190	0%	15,370	2%	13,740	2%	31,300	1%
Agriculture, Forestry, Fishing and Hunting	-	0%	-	0%	140	0%	600	0%	740	0%
Mining, Quarrying, and Oil and Gas Extraction	-	0%	-	0%	200	0%	450	0%	650	0%

Source: ESI estimate, using BLS and LEHD Data (2021, 2019 and 2010)

Change by Worker Industries – 2019 to 2021

Change in Workers by Industry (2019-2021)

	Downtown DC		District of Columbia		Suburban VA		Suburban MD		Metro Region	
	Change	Percent Change	Change	Percent Change	Change	Percent Change	Change	Percent Change	Change	Percent Change
Industries	(13,310)	-7%	(54,100)	-7%	(39,630)	-4%	(51,770)	-7%	(145,500)	-6%
Public Administration	1,450	+2%	5,450	+2%	(2,170)	-1%	(340)	0%	2,940	+1%
Federal Government	1,340	+2%	5,120	+3%	1,810	+3%	5,320	+7%	12,250	+4%
Local Government	110	+2%	330	+1%	(3,980)	-5%	(5,660)	-5%	(9,310)	-4%
Professional, Scientific, and Technical Services	(120)	0%	(13,150)	-11%	(11,340)	-5%	(7,790)	-8%	(32,280)	-7%
Other Services (except Public Administration)	(1,710)	-7%	(8,040)	-11%	(2,070)	-5%	(2,880)	-8%	(12,990)	-9%
Accommodation and Food Services	(9,160)	-46%	(7,680)	-11%	(3,380)	-5%	(5,330)	-8%	(16,390)	-8%
Accommodation	(3,430)	-61%	(5,800)	-36%	(5,010)	-31%	(2,460)	-24%	(13,270)	-31%
Food Services	(5,730)	-41%	(1,880)	-3%	1,630	+3%	(2,870)	-5%	(3,120)	-2%
Administrative and Support and Waste Management and Remediation Services	(1,210)	-12%	(5,210)	-11%	(3,160)	-5%	(4,270)	-8%	(12,640)	-8%
Information	(160)	-3%	(2,230)	-11%	(1,360)	-5%	(1,160)	-8%	(4,750)	-8%
Finance and Insurance	(190)	-5%	(1,650)	-11%	(1,640)	-5%	(1,880)	-8%	(5,170)	-7%
Real Estate and Rental and Leasing	(140)	-5%	(1,410)	-11%	(720)	-5%	(1,430)	-8%	(3,560)	-8%
Construction	20	+1%	(1,700)	-11%	(1,410)	-5%	(4,400)	-8%	(7,510)	-8%
Health Care and Social Assistance	(120)	-5%	(7,830)	-11%	(3,810)	-5%	(7,970)	-8%	(19,610)	-8%
Retail Trade	(370)	-14%	(2,540)	-11%	(3,550)	-5%	(6,540)	-8%	(12,630)	-7%
Arts, Entertainment, and Recreation	(1,420)	-42%	(1,180)	-11%	(570)	-5%	(920)	-8%	(2,670)	-8%
Wholesale Trade	20	+1%	(550)	-11%	(910)	-5%	(1,550)	-8%	(3,010)	-7%
Educational Services	(130)	-9%	(5,390)	-11%	(870)	-5%	(1,390)	-8%	(7,650)	-9%
Management of Companies and Enterprises	40	+4%	(300)	-11%	(1,240)	-5%	(750)	-8%	(2,290)	-6%
Utilities	(10)	-4%	(250)	-11%	(80)	-5%	(120)	-9%	(450)	-8%
Manufacturing	(40)	-17%	(140)	-10%	(410)	-5%	(1,620)	-8%	(2,170)	-7%
Transportation and Warehousing	(60)	-30%	(300)	-11%	(920)	-5%	(1,350)	-8%	(2,570)	-7%
Agriculture, Forestry, Fishing and Hunting	0	N/A	(10)	-25%	-	0%	(70)	-8%	(80)	-8%
Mining, Quarrying, and Oil and Gas Extraction	0	N/A	0	N/A	(10)	-4%	(10)	-9%	(20)	-5%

Source: ESI estimate, using BLS and LEHD Data (2021, 2019 and 2010)

Change by Worker Industries – 2010 to 2019

Change in Workers by Industry (2010-2019)

	Downtown DC		District of Columbia		Suburban VA		Suburban MD		Metro Region	
	Change	Percent Change	Change	Percent Change	Change	Percent Change	Change	Percent Change	Change	Percent Change
Industries	22,170	+13%	85,000	+12%	62,810	+7%	53,690	+7%	201,500	+9%
Public Administration	(2,440)	-4%	(9,100)	-4%	(1,610)	-1%	10,650	+6%	(60)	0%
Federal Government	(2,230)	-4%	(15,790)	-7%	(6,900)	-9%	1,570	+2%	(21,120)	-6%
Local Government	(190)	-4%	6,710	+19%	5,290	+7%	9,080	+9%	21,080	+10%
Professional, Scientific, and Technical Services	7,540	+22%	14,610	+14%	16,870	+8%	2,990	+3%	34,470	+8%
Other Services (except Public Administration)	4,530	+23%	10,250	+16%	1,960	+5%	4,670	+16%	16,880	+12%
Accommodation and Food Services	4,140	+27%	16,570	+30%	12,710	+22%	12,110	+24%	41,390	+25%
Accommodation	70	+1%	310	+2%	(730)	-4%	2,950	+41%	2,530	+6%
Food Services	4,070	+41%	16,260	+42%	13,440	+33%	9,160	+21%	38,860	+31%
Administrative and Support and Waste Management and Remediation Services	2,380	+30%	6,990	+17%	12,440	+23%	2,160	+4%	21,590	+15%
Information	(100)	-2%	710	+4%	(3,320)	-11%	(2,560)	-16%	(5,170)	-8%
Finance and Insurance	(220)	-5%	2,010	+15%	3,530	+12%	(3,020)	-12%	2,520	+4%
Real Estate and Rental and Leasing	910	+46%	2,910	+29%	(270)	-2%	1,750	+11%	4,390	+11%
Construction	1,260	+99%	5,680	+56%	1,170	+4%	9,740	+23%	16,590	+20%
Health Care and Social Assistance	360	+16%	15,670	+27%	14,340	+22%	11,660	+14%	41,670	+20%
Retail Trade	1,190	+82%	4,300	+22%	1,530	+2%	110	0%	5,940	+4%
Arts, Entertainment, and Recreation	840	+33%	3,010	+38%	2,850	+32%	1,820	+20%	7,680	+30%
Wholesale Trade	680	+100%	440	+9%	(700)	-4%	(3,040)	-14%	(3,300)	-7%
Educational Services	590	+66%	9,620	+24%	(410)	-2%	4,010	+32%	13,220	+18%
Management of Companies and Enterprises	500	+82%	410	+17%	2,590	+11%	(150)	-2%	2,850	+8%
Utilities	(60)	-20%	90	+4%	(340)	-17%	310	+29%	60	+1%
Manufacturing	(30)	-12%	150	+12%	(4,210)	-33%	(1,830)	-9%	(5,890)	-17%
Transportation and Warehousing	100	+100%	660	+30%	3,620	+24%	2,350	+17%	6,630	+21%
Agriculture, Forestry, Fishing and Hunting	0	N/A	40	N/A	(20)	-14%	290	+48%	310	+42%
Mining, Quarrying, and Oil and Gas Extraction	0	N/A	0	N/A	60	+30%	(340)	-76%	(280)	-43%

Source: ESI estimate, using BLS and LEHD Data (2021, 2019 and 2010)