The Employment Sectors of Washington, DC and the Downtown Business Improvement District

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Executive Summary

Study Purpose and Background

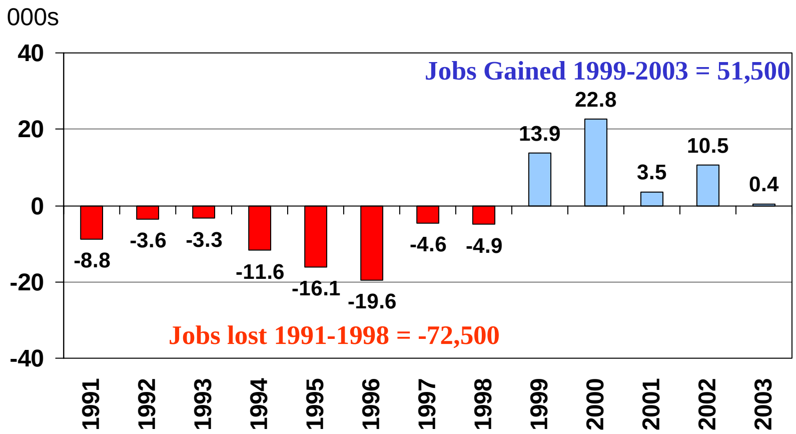
The purpose of this report is to describe the economies of Washington, DC and the Downtown Business Improvement District within their regional economic context and to identify the core sectors driving the economic health of the city and the downtown. This report uses November 2003 data and is an update to the first analysis of the city and downtown BID economies conducted in 2002 using November 2001 data. These analyses have been undertaken to provide the Downtown BID with current information and in-depth understanding of the core employment sectors of BID area as well as the downtown and the city. Primary data sources used in the analysis included employment data from the Bureau of Labor Statistics and proprietary information on companies and employment obtained from InfoUSA, and projections form NPA Data Services.

Key Findings

- While the city overall had healthy job growth in the last several years, the economy of the Downtown BID has been even stronger. The data shows that the City gained 41,600 jobs from 1996 to 2003 (10,900 from 2001 to 2003) and that the Downtown and the BID were where most of this growth occurred. The Downtown BID increased by 44,100 jobs and the downtown by 47,300, respectively, from 1996 to 2003. Government and Professional and Business Services are the key core sectors in the Downtown BID, representing 70 percent of all jobs. These are high value jobs, and it is estimated that the average wage for the 163,900 workers in the Downtown Bid as of 2003 was slightly more than $62,000.

- The economy of the District of Columbia has also performed well in the past five years, having added 51,100 jobs from 1998 to 2003 (BLS annual data), following several years of job losses primarily resulting from federal government downsizing. From June of 1990 to 1998, the District lost a total of 72,500 jobs. Of these losses, 54,000 were government jobs, or approximately three-fourths of the total loss. Only three sectors grew during that period: Professional and Business Services, Education and Health Services, and Other Services (primarily comprised of associations). Shown in the following chart are the job changes in the District using for each year. (While annual data show a very modest gain for the year 2003, more recent BLS monthly data show a gain of 7,000 jobs from July of 2003 to July of 2004.)

District of Columbia
Annual Change in Total Jobs
1991 – 2003



Source: BLS (Annual Data), CRA

- The economy of the District is more specialized than the overall regional economy as it is the primary location of federal government employment and key services sectors directly linked to the city's function as the nation's capital. The Professional and Business Services Sector in the city is second only to the Federal government in importance, and other key sectors resulting from national capital functions are Other Services (associations) and Leisure and Hospitality. The city does not have concentrations of employment in sectors deriving from population-serving functions as nearly as much as the suburban areas of the region. The outlook for the District's economy is for slow to moderate expansion for the next several years with annual job growth averaging approximately 5,000 jobs per year. However, job growth is projected to be in the key services sectors which are high value-added jobs, and it is expected that these job gains will result in continued strong demand for building space, especially in the downtown and the Downtown BID. This job growth – if all were in office space as it mostly would be – would mean an annual need for 1.25 million square feet of new space (at 250 sq. ft. per employee).

- The economy of the Washington region has outperformed all other metropolitan areas for the last several years, being the only large metropolitan economy to have job growth in 2002 and 2003. For the five-year period of June 1999 to June 2004, the region added 260,000 jobs, which is more than twice as many jobs as second place Phoenix. Key reasons for this performance are that the area's economy is cushioned from the full impact of the national business cycle with the performance of its core sectors being shaped by federal government spending and economic activities driven by and linked to national capital functions. These two key factors are important not only in the regional economic outlook but also the outlook for the District of Columbia.

- From 2003-2015 the region is projected to grow by 806,000 people and by 942,000 jobs and it's Gross Regional Product from $288.4 billion in 2003 to $420.0 billion in 2015. The Services sectors will be the focus of this growth and will add 546,000 jobs by 2015, an increase of almost 33 percent and further strengthening of the services nature of the regional economy. Additional growth will be spurred by area's population growth which will drive job gains in the retail sector which employs 316,500 in 2003 and is projected to add approximately 73,000 more by 2015.

1 – Employment Sectors of the Downtown and the Downtown Business Improvement District

(Based on Analysis of InfoUSA data as of 11/03)

The analysis of jobs for the Downtown Business Improvement District and the Downtown used proprietary data files from InfoUSA, which is a source of individual companies and organizations with address, key contact, SIC code, the new National Industrial Classification Code (NAICS) and other items of information. This information is not collected nor tabulated nor defined in the same manner as the Bureau of Labor Statistics data that is available for the city as a whole. Therefore, there are differences in numbers, particularly in some of the details as result of these definitional differences. However, having noted this, the overall trends and directions in the economy and core industries of the city are the same using the InfoUSA data and the standard employment information from BLS. The InfoUSA data was obtained for the earlier study conducted in 2002 for the years 1996 and 2001, and for this update used the November 2003 file.

The economies of the Downtown and the Downtown BID have flourished in the last several years relative to their performance throughout most of the 1990s. The shows that the City gained 41,600 jobs from 1996 to 2003 and that the Downtown and the BID were where most of this growth occurred. The Downtown BID increased by 44,100 jobs over this period, a 37 percent increase, and its share of the regional total went up from 5.0 percent to 5.9 percent. Shown in the table below are the job estimates for 1996 to 2003 based on the InfoUSA data.

Regional Employment Overview (a)

November 2003

	1996		2001		2003		Growth	
							1996 to	2001 to
	Number	%	Number	%	Number	%	2003	2003
Downtown BID (b)	119,800	5.0%	137,400	5.0%	163,900	5.9%	44,100	26,500
Total Downtown (b)	308,000	12.9%	341,800	12.4%	355,300	12.7%	47,300	13,500
District (c)	623,000	26.0%	653,700	23.6%	664,600	23.8%	41,600	10,900
Suburban MD (c)	814,200	34.0%	922,500	33.4%	936,800	33.5%	122,600	14,300
Northern VA (c)	955,400	39.9%	1,188,500	43.0%	1,194,700	42.7%	239,300	6,200
Region Total	2,392,600		2,764,700		2,796,100		403,500	31,400

(a) See Appendix 1 for explanation of differences between BLS and InfoUSA data.
(b) Distribution based on InfoUSA Data
(c) Bureau of Labor Statistics/DC Dept of Employment Services

More importantly than the numerical growth in jobs in the Downtown BID is that the data show the job increases are largely high-value jobs. The government sector held its own in total jobs in the BID from 1996-2003, while the largest absolute growth was in the Professional and Business Services Sector. The sector grew from 30,800 jobs in 1996 to 52,600 in 2003. Its share of total jobs in the BID went up from approximately one-fourth of the jobs to one-third. The kinds of jobs in this sector include Legal Services, Professional, Scientific and Technical Services, Architecture and Engineering, as well as Administrative and Support Services.

Other sectors that grew in the seven-year period were Associations and Other Services, Leisure and Hospitality, Information and Publishing, and modest growth in Retail. It is important to note that the data indicate that the Leisure and Hospitality sector has recovered from the 9/11 impacts. While the Retail sector is not very large, the growth in the period indicates the health of this sector is increasing, and that the activity in the Downtown BID is creating more opportunities for retail to succeed.

Another sector that had significant growth and one that was highlighted in the 2002 analysis of the BID was the "Information and Publishing" sector. This sector includes the broadcasting and media sectors that are strengths of the BID and the Downtown. The sector increased form 5,900 jobs in 1996 to 10,200 in 2003. Given in the table below are the jobs for 1996 and 2003 in the BID by major sector.

EMPLOYMENT BY SECTOR: 1996 - 2003
DOWNTOWN BID
(in 1000s)

	11/1996		**11/2003**	
	Number	Percent	Number	Percent
Government	41.2	34.4%	38.1	23.3%
Federal	na	na	na	Na
State Government	na	na	na	Na
Public Transportation	na	na	na	Na
Professional and Business Services-Except Legal	16.0	13.4%	27.3	16.7%
Legal Services	14.8	12.3%	25.3	15.4%
Health	2.2	1.8%	3.3	2.0%
Associations (& Other Services)	11.1	9.2%	14.9	9.1%
Leisure and Hospitality	11.6	9.7%	13.9	8.5%
Education	1.9	1.6%	2.3	1.4%
Financial Services	8.9	7.4%	8.2	5.0%
Information and Publishing	5.9	4.9%	10.2	6.2%
Retail	3.5	2.9%	4.6	2.8%
Construction	0.8	0.7%	3.1	1.9%
Other	2.0	1.7%	12.7	7.7%
Total	**119.8**	**100%**	**163.9**	**100%**

Estimates based on approximations from SIC to NAICS for the Downtown BID
Source: InfoUSA and GMU Center for Regional Analysis

Using the new NAICS data for 2003, more detail of the makeup the economies of the geographic areas of the city provides an illustration of the core sectors. This information shows that the key and most important sectors, not counting the government, are the Legal Services Subsector (25,200) jobs), Administrative and Support Services (14,500), Associations (11,100), Accommodation and Food Services (9,400), and Information Sector (9,000).

2003 Jobs by Sector by Part of City (a)

(November 2003)

NAICS Supersectors	Downtown BID	Total Downtown	Balance of City	City Total
Construction	3,200	5,500	8,000	13,500
Manufacturing	400	1,400	1,200	2,600
Wholesale trade	300	3,400	1,100	4,500
Retail trade	1,600	5,500	12,200	17,600
Transportation and Warehousing	2,000	3,800	2,600	6,400
Information	9,000	19,600	5,100	24,700
Financial and Insurance	3,800	13,000	7,300	20,300
Real Estate	1,600	5,700	5,700	11,500
Legal Services	25,200	29,300	7,200	36,500
Other Professional Services	6,500	50,200	11,800	62,000
Administrative Services	14,500	33,400	12,800	46,200
Educational Services	1,700	5,800	33,100	39,000
Health Care and Social Assistance	2,900	13,700	40,600	54,200
Arts, Entertainment and Recreation	600	1,600	4,600	6,200
Hotels	6,500	10,400	6,000	16,400
Restaurants	2,900	16,400	12,600	29,000
Associations	11,100	31,400	16,400	47,900
Public Administration (a) (1)	67,300	98,300	117,500	215,700
Other	2,800	6,900	3,500	10,400
Total	163,900	355,300	309,300	664,600

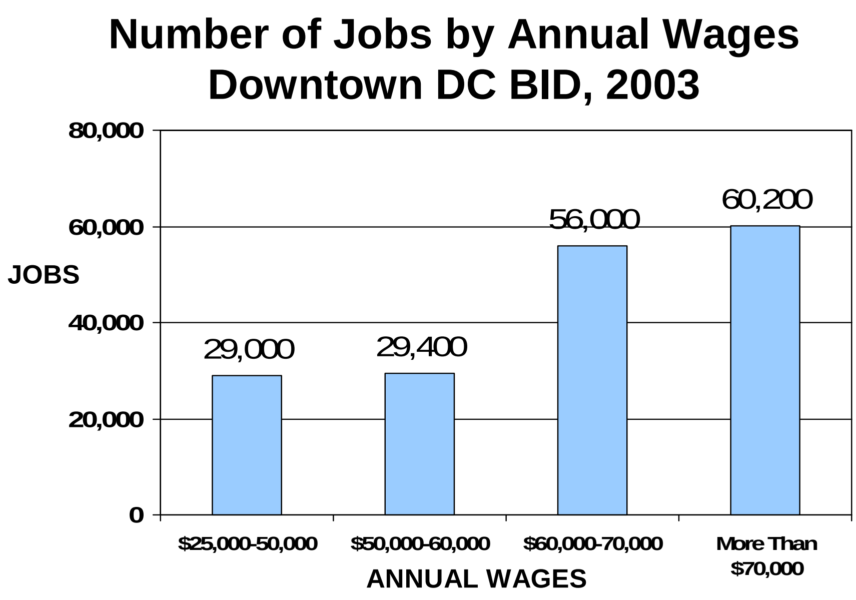
Source: InfoUSA and GMU Center for Regional Analysis, adjusted to BLS Totals
(a) See Appendix 1 for explanation of differences between BLS and InfoUSA data, and within Appendix 1 also an explanation of government/public administration.

Using a Location Quotient analysis based on the economy of the District as a whole, the following sectors show the highest importance rating for the Downtown BID:

Information	1.48
Professional, Scientific and Technical Services	1.31
Administrative and Support	1.28
Government	1.27
Transportation	1.25

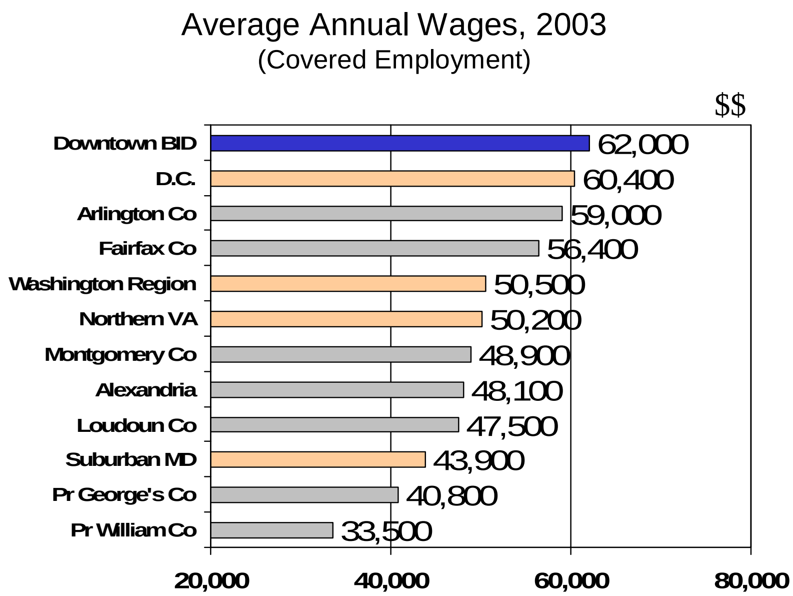
All other sectors were below 1.0 indicating that those sectors had greater importance in other areas of the city.

Not only area these sectors the most important based on number of jobs, but this mix of concentration by sector indicates a high overall average wage for the jobs in the Downtown BID. Using the BLS data on average wage by sector and the estimates of jobs by sector using the InfoUSA data, it is estimated that the average wage in the Downtown BID in 2003 was $62,000. Shown in the chart below are estimates of the number of jobs by wage range.



Source: BLS, InfoUSA, GMU Center for Regional Analysis

Using the BLS data on employment and wages for all jurisdictions in the region shows that in 2003 the District of Columbia had the highest average wage with $60,400, followed by Arlington County at $59,000 and Fairfax County at $56,400. Shown in the following chart are average wages in 2003 for key jurisdictions and subregions.



Source: BLS and GMU Center for Regional Analysis

Total Covered Employment, 2003
(in order of above wages chart)

Downtown BID	163,900
D.C.	650,800
Arlington Co	150,200
Fairfax Co	532,800
Washington Region	2,715,200
Northern VA	1,158,300
Montgomery Co	449,900
Alexandria	91,300
Loudoun Co	104,300
Suburban MD	906,100
Pr George's Co	311,600
Pr William Co	88,800

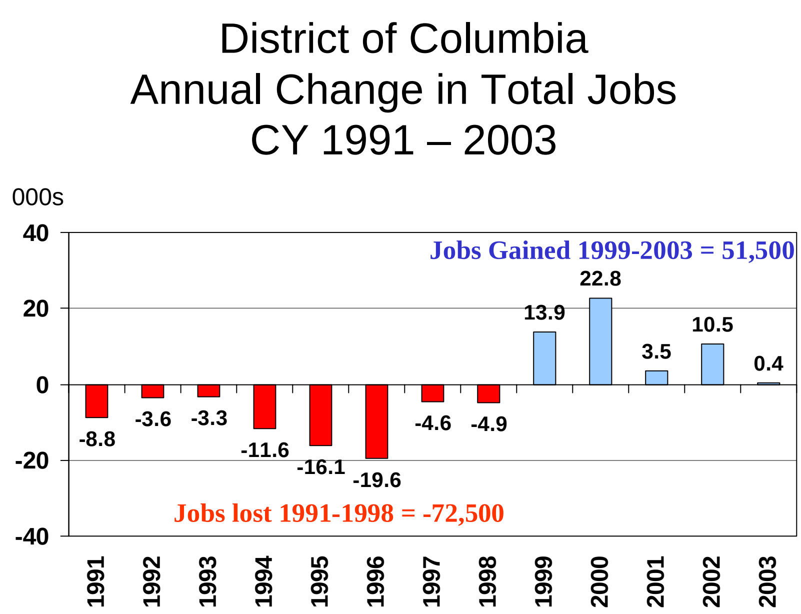
Source: BLS and GMU Center for Regional Analysis

Major employers by key sector for the Downtown BID are listed in Appendix 2.

2 - Performance of the District of Columbia Economy by Sector (1990 – 2004)

The economy of the District of Columbia is more specialized than the regional economy, and its performance is very directly linked to two key factors: the presence of the Federal government and to broader functions and economic linkages as the nation's capital. The city's economy experienced negative job growth from 1990 to 1998 with losses of 72,500 total jobs (BLS Annual data). The largest factor in this decline was the cutback and downsizing of the Federal government which contracted by 33,400 jobs in that period. Those cutbacks, along with the contraction of the DC government by 18,100 jobs, accounted for 71 percent of the city's job losses, with the private sector as a whole losing 21,000 jobs during the period.

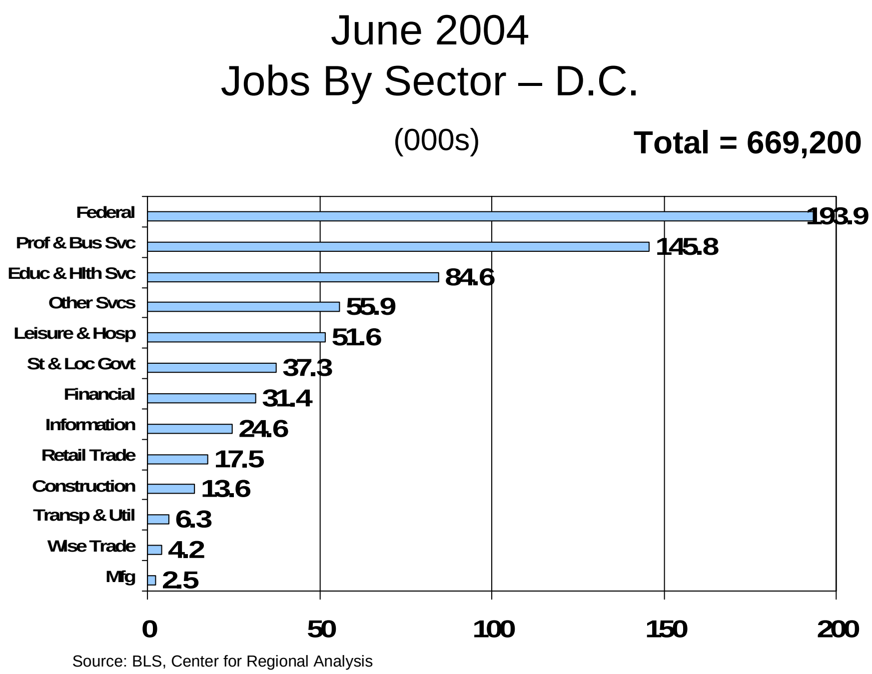
Since 1998, the city's economy has turned around and it added 51,100 jobs from 1998-2003. This increase has been predominantly in the private sector, which increased by 45,700 jobs as the Federal government stopped its downward trend and began adding jobs again with a growth of 6,300 jobs from 1998 – 2003. This very robust job growth in the 5-year period has contributed to the District being consistently ranked in the past few years as one of – if not the – best office real estate markets in country. Shown in the chart below are the annual changes in jobs in the city for the past thirteen years, showing the very healthy job increases since 1998.



Source: BLS (Annual Data), CRA

Looking at the components of the changes in the city's jobs demonstrates the links between the city's economic performance and the links to the Federal government and the national capital functions.   In 2003 the Bureau of Labor Statistics implemented the North American Industrial Classification System in its job tracking data. This new system does a much better job of reflecting the services sector characteristics of economies, of which this region and the District's economies are prime models.

Shown in the chart below is the number of jobs by sector in the District as of June 2004:



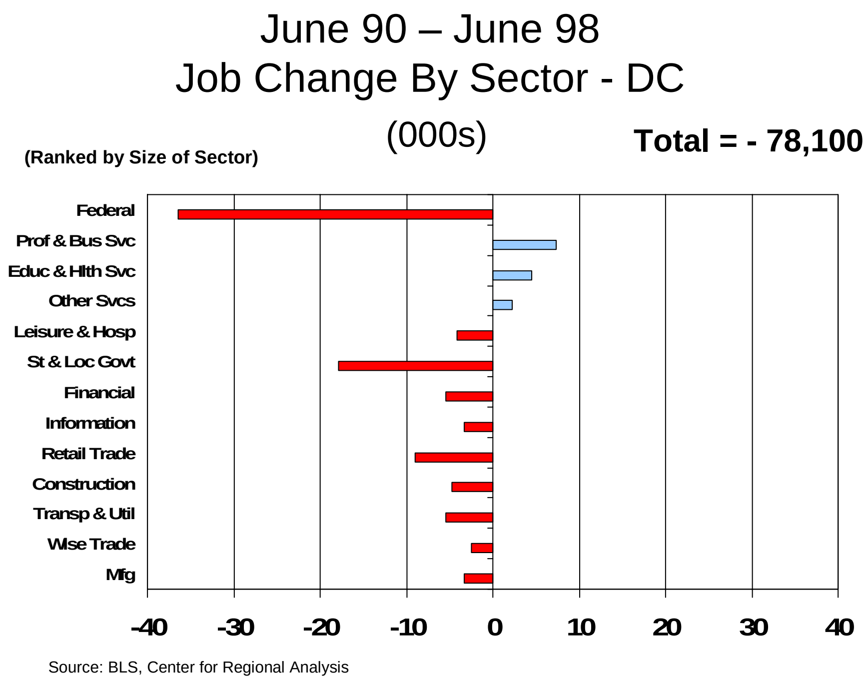
The Professional and Business Services Sector (with 145,800 jobs) is exceeded only by the Federal government. This services sector includes sub sectors that are directly linked to many of the national capital functions and the Federal government:

- Legal Services (36,000 jobs) which represent clients to the legislative, regulatory and contracting Federal functions;
- Computer Systems Design and Related Services (13,600), Management, Scientific and Technical Consulting Services (12,300), and Scientific Research and Development Services (15,600) – all of which are directly related to Federal contracting and especially contracting for technology services.

The third largest sector in the District is Education and Health Services with 84,600 jobs reflecting the importance of these kinds of central city functions as well as the concentration of educational assets in the city. Within this sector, Education Services has 32,100, Health Services is 41,900, and Social Assistance is 10,600.

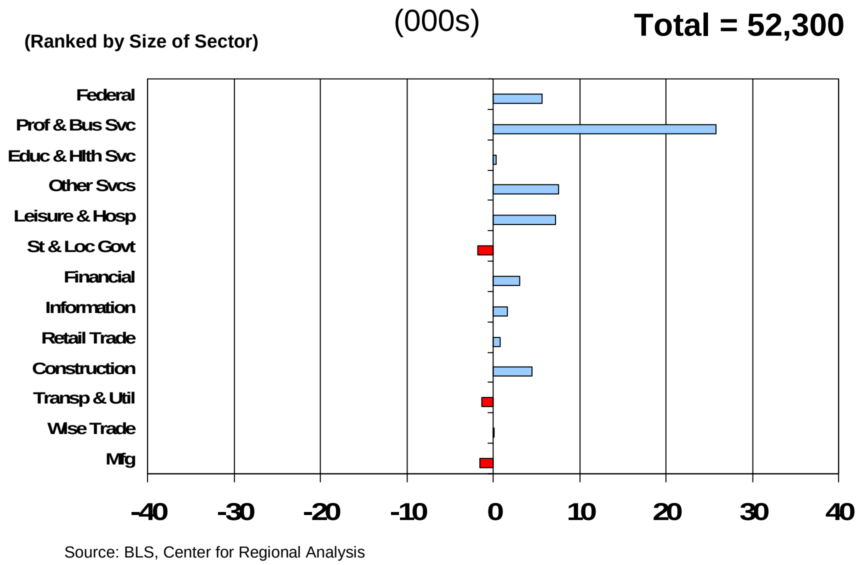
The sector named Other Services has 55,900 jobs and is primarily comprised of associations. Associations have long been important to the city's economy, and many are located here because they carry out lobbying functions with the Federal government and need a Washington presence for that. Leisure and Hospitality (51,600) is also a services sector that represents the tourism industry. Subsectors are “Arts, Entertainment and Recreation” with 5,700 jobs, “Hotels” with 14,800, and “Food Services and Drinking Places” with 31,100 jobs. Many of these activities are directly linked to the national capital function.

Key to understanding the strengths of the District’s economy and projecting its future lies in analysis of how these key sectors have performed. Shown below are the changes by major sector for the overall negative economic period of June 1990 to June 1998. A total of 78,100 jobs were lost in this period, with large majority being Federal government jobs as noted earlier. Three of the four services sectors, however, had job gains in this period and they were the only sectors that had job growth – all other sectors were pulled down or negatively affected by the decline in Federal jobs.



Then, looking at the 1998 – 2004 growth period, the four strongest sectors were the four key sectors linked to the national capital functions. The Professional and Business Services Sector added 25,800 jobs; Leisure and Hospitality added 7,200; Other Services added 7,600; and the Federal Government added 5,700. So of the total job growth in the city from June of 1998 to June of 2004 of 52,400, the four key “national capital services sectors” added a total of 46,300 jobs or 89 percent of the job growth in the city. This is shown in the following chart:

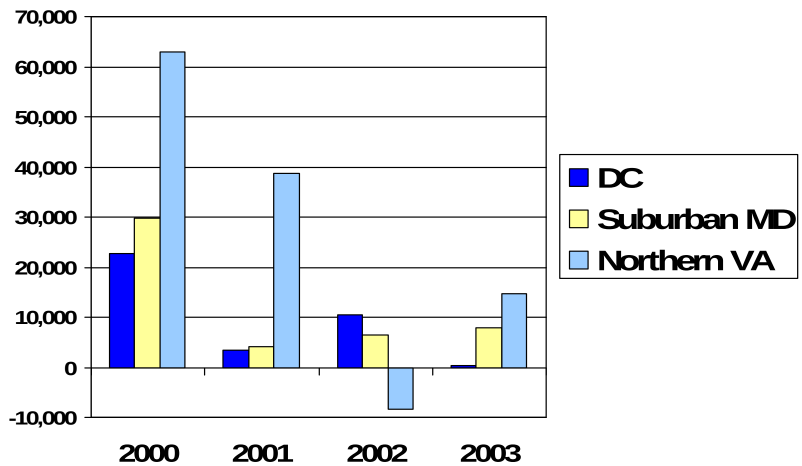
June 98 – June 04
Job Change By Sector - DC



Compared to the suburban economies of the region, these “national capital function” services sectors are more important and are the underlying strength of the District’s economy. Many of the more typical economic sectors – retail and wholesale trade, manufacturing, financial activities – are not as strong in the city because these activities are being carried out in the Maryland and Virginia suburbs. These other sectors are also much more susceptible to business cycles, which is why the city is not as affected by slowdowns linked to national business cycles, which result in less economic stability in the suburban economies.

For example, Northern Virginia added 63,000 jobs in 2000, 38,800 in 2001, and then lost 8,400 jobs in 2002, as shown in the chart on the following page of job change by subregion. Suburban Maryland had dramatic slowdown from growth of 298,800 jobs in 2000 to a much more meager growth of 4,100 in 2001 and 6,500 in 2002. In fact, in 2002 while Northern Virginia was losing 8,400 jobs and Suburban Maryland was adding only 6,500, the District of Columbia grew by 10,500 jobs. These patterns represent a higher stability in job growth trends in the District, and although the city’s growth is more moderate than its suburban counter parts, it does not have their volatility. Shown in the following chart are the job changes by subregion for the years 2000 through 2003. It should be noted that all three areas of the region are now growing faster than the annual data shown in the chart; i.e., for the twelve months of June 2003 to June 2004, the District added 7,000; Suburban Maryland added 18,200; Northern Virginia added 38,100.

Job Change by Subregion: 2000-2003



Source: BLS, GMU Center for Regional Analysis

	2000	2001	2002	2003	TOTAL
DC	22,800	3,500	10,500	400	37,200
Suburban MD	29,800	4,100	6,500	7,800	48,200
Northern VA	63,000	38,800	(8,400)	14,600	108,000

Excluding the Federal government, the make-up of each subregion's employment on a sector basis also demonstrates the importance of the service sectors to the District's economy. For the metropolitan area, the Professional and Business Services sector accounts for 24.0 percent of all jobs excluding the Federal government, while in the District this sector accounts for 30.3 percent. Taking all four services categories combined, they represent 71.5 percent of all non-Federal jobs. In Suburban Maryland and Northern Virginia, they represent 44.9 percent and 50.1 percent respectively. Shown in the table below are the shares of total jobs in each major sector, excluding the Federal government. The Federal government accounts for 28.8 percent of all jobs in he District while representing only 7.6 percent of jobs in Suburban Maryland and 6.1 percent in Northern Virginia.

Major Sectors by Share of Total Jobs - Excluding Federal Government
June 2004

	District of Columbia	Suburban Maryland	Northern Virginia
Professional & Business Services	30.4%	18.7%	25.9%
Education & Health Services	17.8%	11.4%	9.3%
State & Local Government	7.8%	13.3%	11.1%
Retail Trade	3.7%	12.7%	11.5%
Leisure & Hospitality	10.6%	9.8%	9.5%
Construction	2.9%	9.1%	7.5%
Other Services	11.7%	5.3%	5.2%
Financial Activities	6.6%	6.8%	6.1%
Information	5.2%	2.9%	5.1%
Manufacturing	0.5%	4.0%	2.5%
Wholesale Trade	0.9%	3.4%	3.1%
Transportation & Utilities	1.3%	2.6%	3.3%
TOTAL	100.0%	100.0%	100.0%

Source: BLS and Center for Regional Analysis

The BLS data for the District on a monthly basis in the new NAICS system provides some insight for subsectors in which the District specializes. For example, the Radio and Television Broadcasting subsector had 4,900 jobs as of June 2004, and has grown by 23 percent since 1998, which is more than twice the overall job growth rate for the period.

Additionally, the Legal Services sector grew by 19.6 percent over that period, and the Legal Services sector in the District represents 69.9 percent of all sector jobs in the Washington metropolitan area. Interestingly, the District's share of the region's Legal Services Sector has been maintained over the last fourteen years in spite of the perception that many firms originally only in the city have begun locating more operations in the suburbs. In 1990 the District had 69.7% of the Legal Services sector. That declined to 66.7 percent in 1998 – but from 1998 – 2004 has gone back up to 69.9 percent. From June of 1998 to June of 2004, the metropolitan area grew by 6,200 Legal Services jobs and 5,700 of those were increases in the District, or 91 percent of the total metropolitan increase. Legal Services continues to be a strength of the District's economy.

Trends in the District's employment make-up since 1990 show continued specialization in economic activities linked to the national capital functions. Shown in the following table are the major sectors and the share they have of all jobs in the District excluding Federal government for June of 1990, 1998 and 2004.

District of Columbia
Major Sectors by Share of Total Jobs (Excluding Federal)
June Each Year

	1990	1998	2004
Professional & Business Services	24.0%	28.0%	30.4%
Education & Health Services	16.9%	19.6%	17.8%
State & Local Government	12.1%	9.1%	7.8%
Retail Trade	5.5%	3.9%	3.7%
Leisure & Hospitality	10.3%	10.4%	10.6%
Construction	2.9%	2.1%	2.9%
Other Services	9.8%	11.3%	11.7%
Financial Activities	7.2%	6.6%	6.6%
Information	5.6%	5.3%	5.2%
Manufacturing	1.6%	0.9%	0.5%
Wholesale Trade	1.4%	1.0%	0.9%
Transportation & Utilities	2.8%	1.8%	1.3%
TOTAL	100.0%	100.0%	100.0%

Source: BLS and Center for Regional Analysis

The Professional and Business Services Sector has gone from 24.0% of the city's economy in June of 1990 to 30.4% now. Two of the other three sectors that have increased their share of jobs in the District are the Leisure and Hospitality Sector and the Other Services Sector. Growth in both of these sectors as well as Professional and Business Services demonstrate the importance of the links to the national capital functions that benefit the economy of the city.

3 - The Economic Outlook for the District of Columbia

Overview

The future of the District of Columbia as the central jurisdiction within the Washington area metropolitan area from 2003 – 2015 can be measured by comparing the projected relative growth of its major economic and demographic variables. This comparison is presented in Table 3-1. By all measures, the District of Columbia is expected to grow substantially more slowly than its suburban neighbors extending a trend that has its origins in the post-WW II suburbanization and decentralization of the region. While the metropolitan area is expected to experience substantial economic and population growth over this period, the District's role in the region will become more narrowly focused and its growth rates will lag the region's gains. However, its growth will be in large part in sectors that have high value-added jobs.

As was indicated previously, the region's economic growth will reflect the combination of population-driven gains and gains linked to the region's national capital functions. The District's future economic activity will not benefit to the same degree as the suburban areas from these two market drivers as its population is not expected to increase sufficiently (census projections show it may actually decline) to support job growth in the residentially-dependent sectors and the structure of its national capital functions has made the District more dependent on government employment and less well positioned to benefit from the expected more growth in the private sector.

This imbalance in sectoral dependence is seen in the District's expected source of future job growth: private sector job growth is projected at 8.2 percent compared to 28.1 percent for the metropolitan area. As shown in Table 3-2, employment in the government sector is projected to grow 18.5 percent in the District, a rate similar to projected government job growth in the metro area, but the composition of this job growth is very different. In the District, government job growth is tied to expansion of the federal government while in the suburbs it is tied to population growth. This distinction further underscores the differences between future economic growth in the District and the suburbs.

Table 3-1
Forecasts for the District of Columbia: 2003-2015
(GSP in billions of 2004$; Jobs and Population in millions)

Economic Activity	2003	2015	% DC Change	% Area Change
Gross State Product	67.5	85.0	25.9%	45.6%
Total Employment *	750.1	838.1	11.7%	26.6%
Private Sector Jobs	503.2	544.5	8.2%	28.1%
Population **	579.1	673.7	16.3%	17.7%
Population ***	564.9	550.1	-2.6%	15.5%
Households**	257.7	292.9	13.7%	19.2%
Households***	247.3	246.8	-0.2%	17.7%

Sources: NPA Data Services, Inc.; GMU Center for Regional Analysis
* all jobs inclusive of self-employed and part-time workers
** COG Round 6.3 forecast
*** US Census Forecast

Still, the economy of the District is projected to experience real growth of 35 percent over this period. In order to achieve economic growth that substantially exceeds job and population growth requires increased economic interdependence between the city and the suburbs—inter-regional commuting will likely increase as will the magnitude and significance of inter-jurisdictional business and vendor transactions.

Sector Growth Patterns

The narrowing of the District's sectoral structure and economic specialization is clearly evident in the shifts of jobs between sectors (winners and losers), as shown in Table 3-2. Projected job growth in the District will be limited to two sectors -- services and government. These two sectors are presently the source of the largest share of District jobs (83%) and are the only source of net new jobs (88,000) over the forecast period. With these gains, these two sectors will account for 86 percent of all District jobs by 2015. The District's other sectors are projected to contract losing a combined total of 14,300 jobs (job categories not shown separately are projected to grow by 2,200 by 2015). These losses, even though relatively small, confirm the narrow base of the District's economy and show it to becoming even narrower in the future.

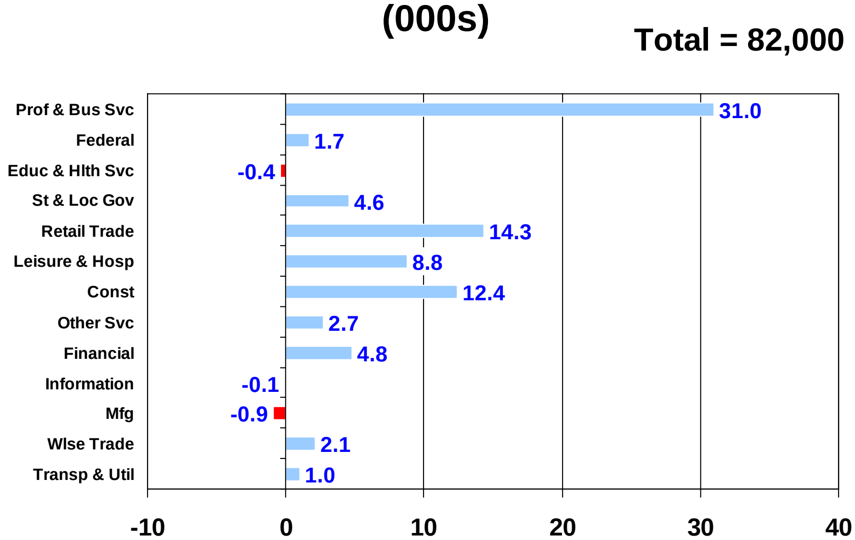
Table 3-2
Employment Growth in the District of Columbia by Sector: 2003-2015
(Jobs in thousands)

Sector	2003	2015	% DC Change	% Area Change
Total Employment (1)	750.1	838.1	11.7%	26.6%
Services	380.0	427.4	12.5%	33.7%
Government	246.5	292.2	18.5%	20.0%
Federal Civilian	188.2	231.5	23.0%	23.1%
Military	23.0	24.7	7.4%	7.4%
State/Local	35.6	37.0	3.9%	20.1%
Retail (2)	19.5	19.6	0.5%	23.2%
Fin., Ins., Real Estate	37.5	36.6	-2.4%	17.8%
Transport/Utilities	33.4	28.3	-15.3%	24.1%
Construction	13.1	13.0	-0.8%	24.3%
Manufacturing	3.5	2.8	-20.0%	6.7%
Wholesale Trade	4.4	3.7	-15.9%	28.6%

Sources: NPA Data Services, Inc.; GMU Center for Regional Analysis
(1) All jobs inclusive of self-employed and part-time workers; sum of sectors do not add up to total as unclassified and other jobs not listed separately.
(2) This data series is based on NPA population forecasts, not COG. If COG forecasts are used, the residential-based employment sectors would be higher (Retail, e.g.)

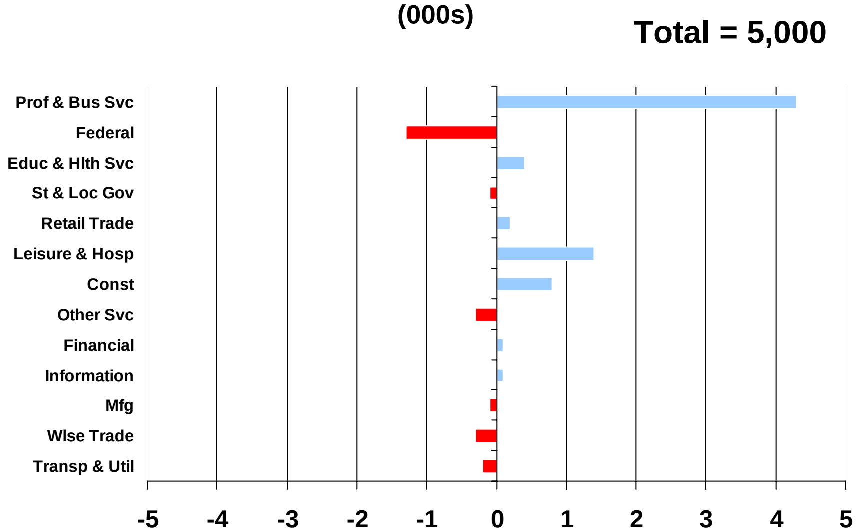
This pattern of future job growth, as depicted in Table 3-2, is already in evidence. For the most recent twelve-month period (June 2003-2004), the District of Columbus generated 5,000 new jobs (6 percent of the total) while the metropolitan area was adding 82,000 net new jobs. In comparison, the five counties of Suburban Maryland added 15,800 jobs while job growth in Northern Virginia totaled 37,400. Not only did each sub-state portion of the metropolitan area account for a different scale of job growth over the past twelve months, the sectors in which this job growth occurred also varied across sub-state areas. These different job growth patterns are presented in the charts on the following two pages showing job change by sector for the region and each sub-state region for June 2003 to June 2004.

June 03 – June 04
Job Change By Sector - PMSA
(000s)



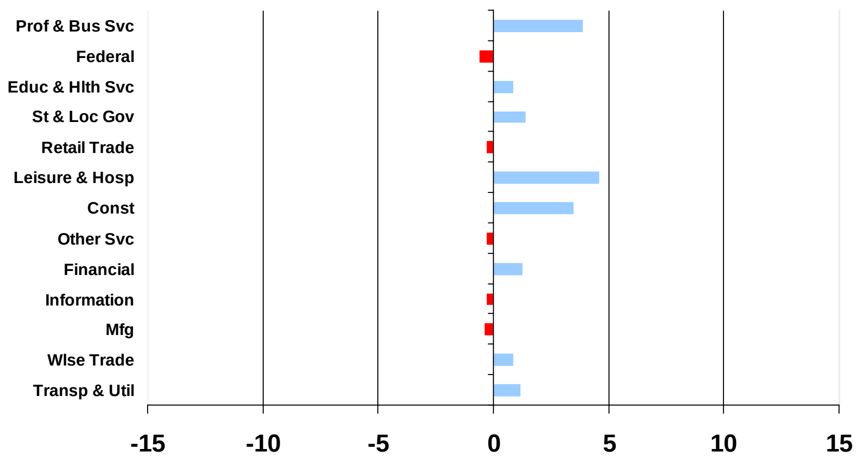
Source: BLS, CRA

June 03 – June 04
Job Change By Sector - DC
(000s)



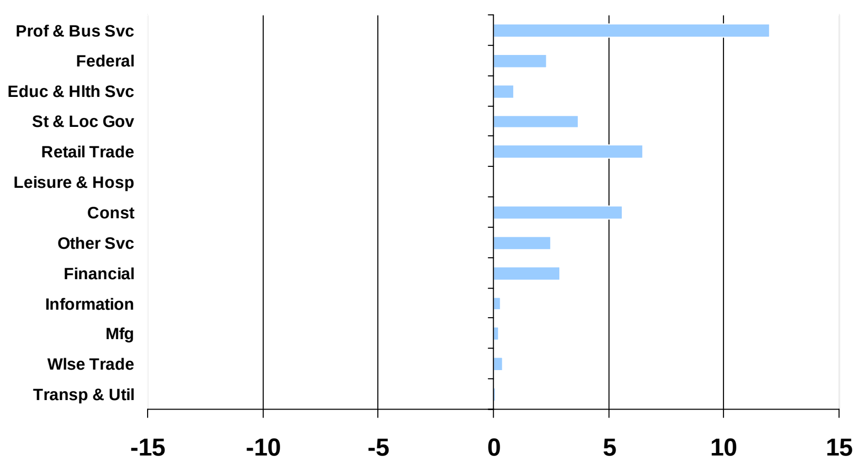
June 03 – June 04
Job Change By Sector – Sub MD
(000s)

Total = 15,800



June 03 – June 04
Job Change By Sector – No VA
(000s)

Total = 37,400



In the District, professional and business services, accounting for the largest number of total jobs, generated the largest number of new jobs contributing most of the net gain.

Six other sectors generated gains over this twelve-month period while six sectors experienced losses. This twelve-month slice of the year (June to June) was not significantly different from previous twelve-month periods, except that federal employment has been marginally positive over the past several years.

What this pattern shows is: (1) the strength of the District economy continues to be professional and business services, which are high value-added jobs; (2) the federal government as an employer continues to be a major source of employment but not for new jobs but rather for replacement jobs; the hospitality and leisure services sector is growing and has regained its strength following the September 11, 2001 terrorist attack; and retail trade is expanding slowly in response to a healthier tourist market and to gains in disposable income among city residents. Still, it is clear that the District's economy is less diversified in contrast to the Suburban Maryland and Northern Virginia economies in which job gains revealed gains across almost all sectors and in proportion to the sector's relative importance as a source of jobs within the overall economy. Northern Virginia showed the best balance in this regard among the area's three sub-state portions.

While it is clear that the District's future job growth and its economic vitality will be dependent on the continued growth of the federal government within the city's boundaries and the continued location and expansion of complementary national capital functions in the District (e.g., hospitality industry, international and membership organizations, professional services linked to regulatory and lobbying functions), the composition of these services and their growing locational specialization will be important to the future economic health of the District and its central employment area.

Economic Forecast for the District of Columbia: 2015

The overall economy of the District of Columbia is project to experience slow expansion over the decade. The economy started the decade with a relatively strong gain in spite of the national recession that spanned the second through fourth quarters and the immediate impact of the September 11th terrorist attack. The lingering effect of 9/11 on the District's hospitality industry explains its economic contraction in 2002 even though federal spending in response to the War on Terrorism accelerated during the year. This apparent contradiction results from the lag effects of 9/11 as well as the increased federal spending on the District's economy.

The impacts of the gains in federal spending are seen in the City's economy turn around in 2004 that is projected to continue in 2005. Following relatively strong gains in 2004 and 2005, the District's economy is expected to slow its expansion but continue to grow over the remainder of the decade. This growth pattern is presented in the Table 3-3.

Table 3-3
District of Columbia Economic and Employment Forecast: 2000-2015
(GSP in billions of 2004$s; Jobs in thousands)

Year	Gross State Product	Percent Change	Total Jobs	Percent Change	Private Sector	Percent Change	Services Sectors	Percent Change
2003	68.3	3.2%	750.1	0.7%	503.2	0.7%	380.0	0.7%
2004	69.9	2.3%	755.4	0.7%	504.2	0.2%	382.5	0.7%
2005	71.6	2.5%	762.4	0.9%	506.7	0.5%	386.0	0.9%
2006	72.8	1.7%	768.2	0.8%	508.6	0.4%	388.9	0.8%
2007	74.1	1.7%	774.6	0.8%	511.2	0.5%	392.3	0.9%
2008	75.2	1.5%	780.5	0.8%	513.6	0.5%	395.5	0.8%
2009	76.4	1.6%	787.4	0.9%	516.7	0.6%	399.1	0.9%
2010	77.8	1.9%	796.0	1.1%	521.2	0.9%	403.8	1.2%
2015	85.0	1.8%	838.1	1.0%	544.5	0.9%	427.4	1.1%

Sources: NPA Data Services, Inc.; GMU Center for Regional Analysis
* all jobs inclusive of self-employed and part-time workers; sum of sectors do not add up to total as unclassified and other jobs not listed separately.
Reflects NAICS classification available beginning 2001 and later.
2015 percent changes are annual compound rate 2010 - 2015.

The District of Columbia's economy has been becoming more narrowly specialized over the past three decades. The emerging sector strengths upon which the District economy depends are: its national capital functions including direct federal spending, spending of associations, lobbyists, and professional representing the interests of their clients in cases at the federal level (lawyers would be included in this grouping) and international activities (both governmental and business-based) and the hospitality industry. Health and education have become an increasingly important force in the local economy.

In contrast to the nineties, the government sector has become an important source of jobs. Where federal employment in the City declined by 18 percent from its 1992 peak through 2002, it is now expanding. Projections show federal sector adding 46,700 new jobs between 2003 and 2015 bringing its total back to its 1992 level. Annual gains in federal employment in the District are projected to average 1.5 percent from 2001 to 2015. Even though federal job growth is unrelated to the health of the economy, that is, government employment is inelastic, it has become a future source of new jobs in the City and will be a positive force underpinning the District's economy going forward.

The private sector, which normally is the source of the economy's acceleration during the early stages of an expansion, is not projected to experience any growth spurts in the District. This is due primarily to the nature of the private sector in the District; it is not linked to national or global markets and therefore does not benefit from changes in consumer demand of business investment, as do the private sectors of non-government based economies. Still, the services sector is projected to outperform the aggregate private sector reflecting the expected strong gains in management and business service firms and the continuing strength of the hospitality industry. While neither sub-sector will be explosive sources of job growth, they will increase their already significant share of the annual jobs gains in the District from 47.1 percent in 2004 to 57.6 percent of the annual job growth by 2015.

As in the past, the future of the District of Columbia economy is inextricably tied to federal government spending and to its attraction for business activities supporting the national and international functions of the capital. While federal employment growth is projected to contribute to the District's economic growth over the next ten years, federal procurement contracting offers significantly greater potentials for future business development and diversification of the local economy. However, current federal procurement trends in the District have not positioned the District's economy to achieve this potential and will require aggressive actions on the parts of both government and business to reposition the local business base to better compete for this rapidly expanding source of future economic growth. Economic growth based on increased demands for goods and services by District residents will depend on increasing the residential base of the District and increasing household incomes. While the City's household income structure is improving as reflected in gains in the residentially supported economy, the required population gains have not as yet been achieved. As the City's population grows over the coming two decades, the local-serving business base will enjoy renewed growth. In the short run, the District's economic future is tied to its non-local serving business base. Success in expanding this base, broadening its mix of services and markets, and retaining the City's historic comparative advantages will be critical to the vitality of the District of Columbia's economy over the coming ten years and beyond.

With services accounting for one-half of the annual job growth during the current decade and with management and business and hospitality services being the principal sources of these job gains, it is probable that the central employment area will continue to experience strong demand for building space. This concentration of business development is likely to be further increased by the growth of government jobs especially by federal government workers, as these will be housed in existing agency buildings or leased office space nearby. Only concerns for security and the absence of available building sites of new office buildings would result in a significant change in the District's historic office market pattern.

4 - The Economic Outlook for the Washington Area

Overview

The growth of the Washington area economy will continue to be closely linked to federal spending and the national capital functions linked directly and indirectly to the federal government. This spending will support job growth that exceeds the region's ability to supply workers from within its resident population. As a result of net in-migration generated in response to continued above-average job growth, the regional economy will reflect a two-pronged growth pattern going forward: (1) high-end job growth (professional and business services with a technology-intensive and knowledge-base foundation) supported by federal spending and related national capital functions and (2) population-serving job growth supported by increases in population combined with growth of purchasing power; these jobs will be seen largely in retail trade, construction, and health and education services.

This combination of job growth (sector mix) will support above-average multipliers as the breadth of residentially based services will capture a significant proportion of the spending potential generated by personal earnings resulting from employment growth in the non-residentially supported sectors. Both categories of jobs are projected to grow with the important distinction between these two categories being their average salaries; the wage differentials between the residentially supported jobs and non-residentially supported jobs ranges up from 200%; at the upper end of the professional and business service category this difference could be 400% or more.

There will be 0.94 million new jobs added to the Washington economy by 2015. Half of these new jobs will be high value added and technology intensive with well above-average earnings while the other half will have a below-average salary scale. It is not whether there will be enough jobs in the future (there will be almost as many new jobs as new residents) but rather the important question is how these jobs will be distributed across the Washington area jurisdictions and how will central functions located in the District of Columbia perform in this regional context.

The Future of the Washington Area Economy

The Washington area economy is cushioned from the full impact of the national business cycle with the performance of its primary core industries being shaped by federal government spending and economic activities linked to the national capital functions. Building on this foundation, economic gains in the Washington area will be measured by job growth in the private sector with technology-intensive and knowledge-based activities leading the economy's future. The basic forecast for the Washington region is presented in Table 1.

Table 1

Regional Forecasts for the Washington PMSA: 2003 - 2015

(GRP in Billions of 2004 $s)

			Total Change		Annual Change	
	2003	**2015**	**#**	**%**	**#**	**%**
Gross Regional Product	$ 288.4	$ 420.0	$ 131.6	45.6%	$ 11.0	3.2%
Total Employment	3,546,000	4,488,000	942,000	26.6%	78,500	2.0%
Private Sector Jobs	2,846,000	3,647,000	801,000	28.1%	66,700	2.1%
Population	5,189,000	5,995,000	806,000	15.5%	67,200	1.2%
Households	1,961,000	2,308,000	347,000	17.7%	28,900	1.4%

Source: NPA Data Services, Inc.; GMU Center for Regional Analysis

The population of the Washington area is projected to increase to 6.0 million by 2015 for a gain of 806,000 people or 16.1 percent. During this same period, the region's employment base is projected to grow by 942,000 workers for a gain of 26.6 percent. The gain in jobs will be almost as great as the gain in population. This means that labor force participation will likely increase, especially among women, and that increasingly the Washington region will depend on residents of adjacent metropolitan areas and jurisdictions to supply its labor requirements.

Most important in this forecast is the magnitude of growth projected for the economy's output. GRP is projected to increase by $131.6 billion or 45.6 percent even though the area's employment base is only expected to grow by 26.6 percent.

GRP is projected to grow almost twice as fast as jobs over the 2003-2015 period. How can that be? Gains in output occur because there are gains in the number of workers and/or because the added workers are more productive than the workers already in the economy.

What these forecasts show is that the Washington area economy is projected to grow and evolve becoming more productive; that is, its growth will be led by high value added sectors. The jobs being added will be predominately "good" jobs and the existing job base will shift increasingly towards higher value added economic activities.

What types of new jobs will emerge and drive the economy's growth over the coming two decades? The answer to that question is already becoming apparent in the job growth patterns that have emerged in the last several years. These will be discussed and are illustrated in the following pages.

Sector Growth Patterns

The services sector (this is all service sector categories) accounted for 46 percent of the region's jobs in 2003 and is projected to add 541,300 new jobs by 2015, representing 57 percent of the area's total job growth during the 2003-2015 period. No other significant sector will grow at a faster rate than the average rate for total employment growth. While all sectors are projected to add jobs, the largest sectors will account for the bulk of the gains. Services, government, and retail trade accounted for 75 percent of total employment in 2003 and will add 754,400 new jobs over the 2003-2015 period accounting for 80 percent of the job growth.

Table 2

Employment Growth in the Washington Area By Sector, 2003-2015*
(Jobs in thousands)

Sector	2003	2015	% Change
Total Employment	3545.7	4487.6	26.6
Services	1622.1	2168.4	33.3
Total Government	699.1	838.9	20.0
Retail Trade	316.5	389.8	23.2
Fin., Ins., Real Estate	266.9	314.3	17.8
Transport/Utilities	232.5	288.6	24.1
Construction	213.6	265.5	24.3
Manufacturing	101.0	107.8	6.7
Wholesale Trade	76.0	97.7	28.6

Sources: NPS Data Services, Inc.; GMU Center for Regional Analysis
*reflects NAICS classifications (available beginning in 2001 and going forward.)

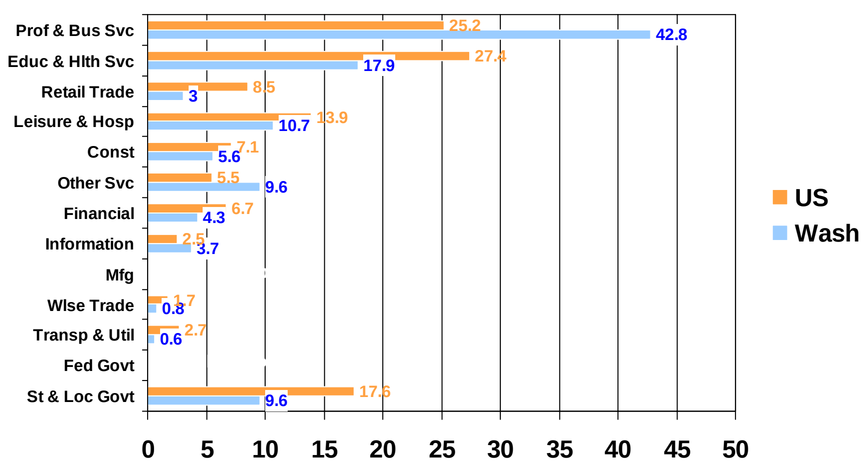
The sources of future growth in the Washington area will remain the same as they have been in the past: the growth of the federal government and the area's population. The region's national capital functions will drive growth in the service sector; also, the federal government work force is projected to increase by 87,100 for a 21 percent increase over the 2003-2015 period. Additionally, the area's population growth (16%) will drive job gains in the retail sector; the retail sector will also benefit from the gains in the area's visitor industry. Projected growth of local government jobs (54,800 or 20.1% from 2003 to 2015) will also be tied to the area's population increase.

With gains in the service sector driving the Washington region's growth and with the total value of the region's economy growing faster than its increase in jobs, these new jobs must have greater productivity, higher value added, and above-average incomes than the job base that existed in 2000. From the accompanying charts that describe the composition of the Washington area employment base in 2003, it is clears that the future of the Washington area economy will be technology-intensive and knowledge-based work. As a result of the evolution of the area's economy over the past two decades, the Washington area economy already has significant specialization in technology-intensive sub-sectors and these have contributed to its continued growth during the national recession and subsequent slow recovery in 2002 and 2003. Most important, these specializations have positioned the Washington region for continued strong growth into the future.

5 - Summary of Sector Trends and Comparative Performance - Washington PMSA
1990 - 2003

The principal difference between the Washington area economy and others is the dominance of professional and business services as a source of job growth; during the 1990-2003 period, it generated 42.8 percent of the Washington area's new jobs while nationally it accounted for only 25.2 percent. With the exception of the information and other services sectors, the contribution of the economy's other major sectors to the Washington area's job growth was smaller than at the national level. In short, the Washington area has been generating a higher proportion of high value added, technology-intensive, knowledge based jobs than the nation.

Figure 1: 1990 - 2003
Share of Job Growth By Sector – U.S. vs PMSA

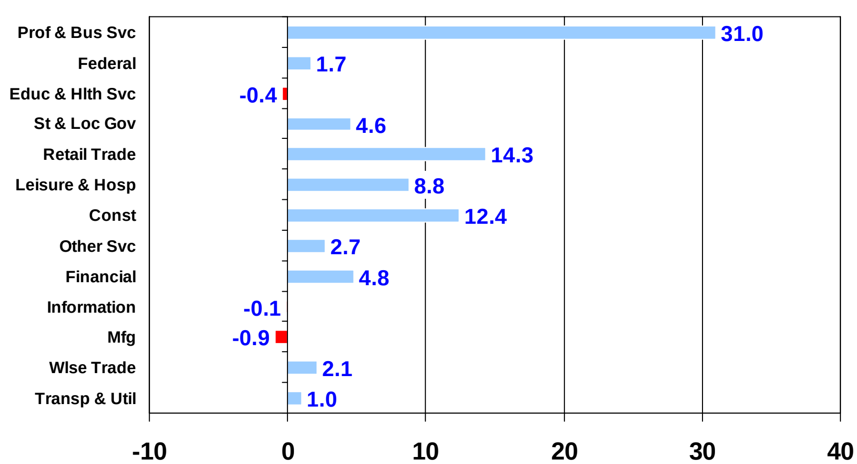


Source: BLS, CRA

The historic pattern of strength revealed in Figure 1 is seen in the most recent twelve-month job growth data; the region's more important sectors (those accounting for the greatest number of jobs) are growing faster locally than nationally and the Washington area's least important sectors, in terms of the number of jobs for which they account, have under-performed their respective national sectors. In term of sectors having greater potentials for job generation, the Washington area continues to build on strength and is shifting away from its weaker sectors. The sectors in Figure 2 below are ranked by size in the region's economy.

Figure 2: June 03 – June 04
Job Change By Sector - PMSA
(000s)

Total = 82,000



Source: BLS, CRA

The Washington area economy's principal core industry is the federal government; it accounts directly for almost one-third of the economy's total output. Growth in federal spending is not cyclical although during the 2001-2003 period, it performed in a counter-cyclical fashion helping to off set the cyclical weaknesses in non-federally related business activities during the national recession. The interdependencies among the economy's principal sectors further protect the area's economy from the full impact of national business cycles.

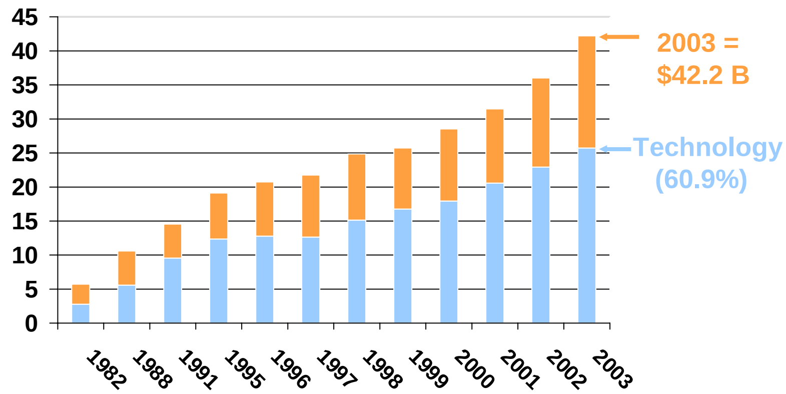
Figure 3: Washington Area Core Sectors Outlook

Core Sector	Value 2003	Annual % Chg 95 - 00	% Chg 2003	% Chg 2004	% Chg 2005
Federal Govt Total	96.1	4.0	9.8	8.5	7.5
Fed Procurement	42.2	7.0	16.9	12.5	9.5
Technology	43.2	12.0	4.1	6.5	6.0
Building Indus.	19.6	6.0	-3.0	0.0	4.0
International	16.2	3.0	2.0	3.0	2.8
Hospitality	6.6	2.0	3.0	7.6	5.0
Overall GRP (2004 $B)	$288.4	3.2	4.1	4.3	4.1

Source: Center for Regional Analysis

The benefit of these sectoral interdependencies is seen in the growth of the federal market for technology sales in the Washington area. As federal procurement spending was increasing, the percentage of these outlays that purchased technology services also increased. In 2000, technology purchases by the federal government from local contractors totaled $18 billion; in 2002, these technology purchases totaled $23 billion. This two-year increase of $5 billion in federal technology purchases underpinned the area's technology sector as its commercial markets contracted in the dot com bust.

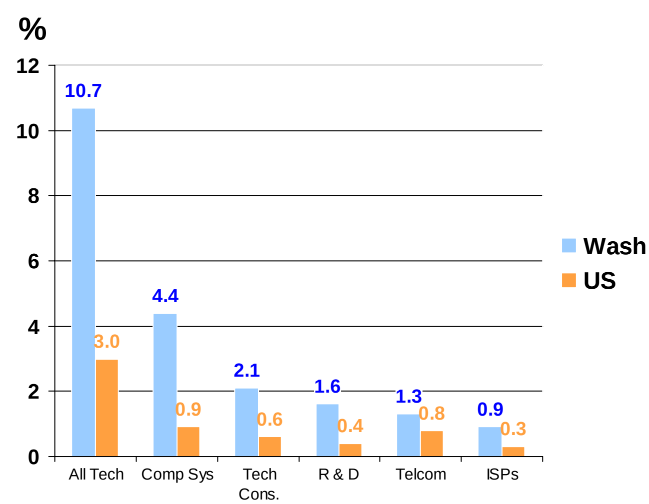
Figure 4: Total Federal and Technology-Intensive Procurement in the Washington Metro Area, 1982 - 2003



Total Federal Procurement Spending
In Washington MSA 1982-2003 = $415 B

Due to the growth of federal technology purchases over the last twenty years, the Washington area economy has become specialized in a wide range of technology-intensive sub-sectors. Overall, 23.9% of the area's total payroll employment is classified as technology workers; nationally, only 8.1% are similarly classified. The Washington area has a higher percentage of its work force in each of the technology sub-sectors than does that national work force. Compared to Boston and Silicon Valley, the Washington region exceeds those in technology specialization as well. For the "Professional, Scientific, and Technical Services Sector," Washington has 15.2% of its employment in that sector while the San Jose PMSA (Silicon Valley) has 11.7% and Boston PMSA has 8.7%.

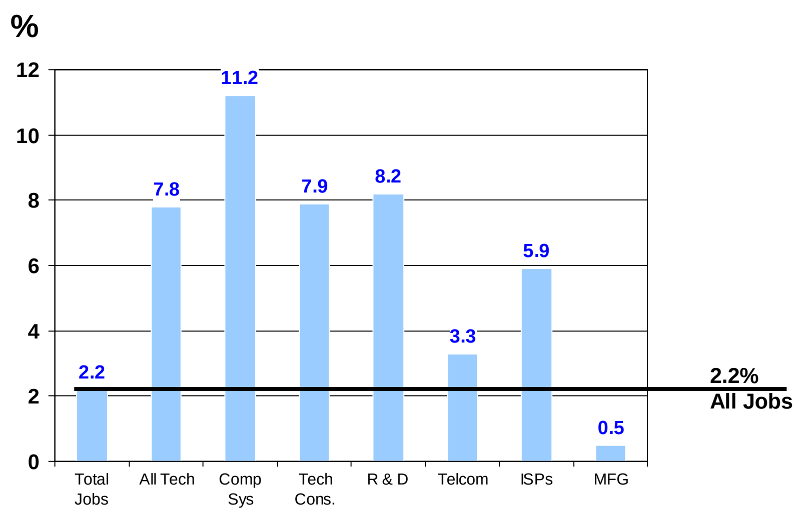
Figure 5: Technology Subsectors as Percent of Total Employment – 2003 Washington PMSA v U.S.



While the Washington area accounts for 2.2% of the nation's employment base, its share of each technology sub-sectors is well above this average. All technology subsectors for the Washington region grouped together comprise 7.8% of total for the U.S. Of particular note is the category "Computer Systems Design and Related" subsector. The companies in this subsector in the region are the systems integrators and software technology service companies whose major client is the federal government. In contrast to the services and technology, manufacturing in substantially under represented in the Washington economy.

This pattern of job distribution is what was implied by the term "the new economy."

Figure 6: Washington PMSA as Percent of U.S. - 2003



Shown in Figures 7-11 are comparisons of key technology sectors and subsectors of the Washington metro area and the other largest ten metro areas and Silicon Valley.

In 2003, the Washington area had almost 600,000 jobs in the professional and business service category (this number excludes self-employed workers, employees of start-up firms established in 2003, contract workers, part-time and undocumented workers, and uniform military personnel). Still, the only metropolitan areas to have a larger number of workers in this category were New York and Chicago, the number 1 and 3 economies among metropolitan areas nationwide. Los Angeles, the 2nd largest metropolitan area economy, had fewer jobs in professional and business services than the Washington area economy, which is the 4th largest economy overall. This is the job classification where most of the federal contractors would be located and is inclusive of technology-intensive sub-sectors.

(Note: Figures 7-11 are shown in two ways – the A chart shows jobs in absolute numbers, and the B chart shows the percent that the job category is of total non-federal jobs in each region's economy. "Non-federal total jobs" is used here rather than total jobs because the size of the federal government in the Washington economy distorts the relative size of each other sector.

Figure 7A: Jobs in Professional and Business Services, 2003

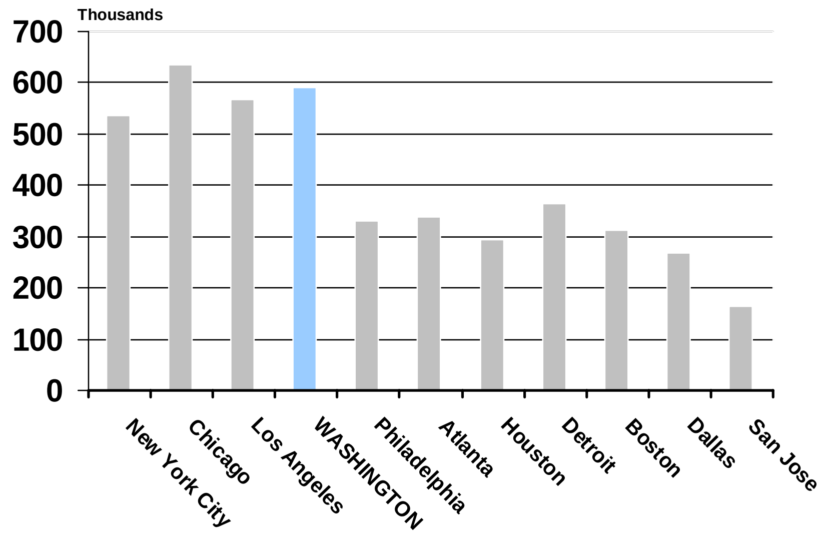
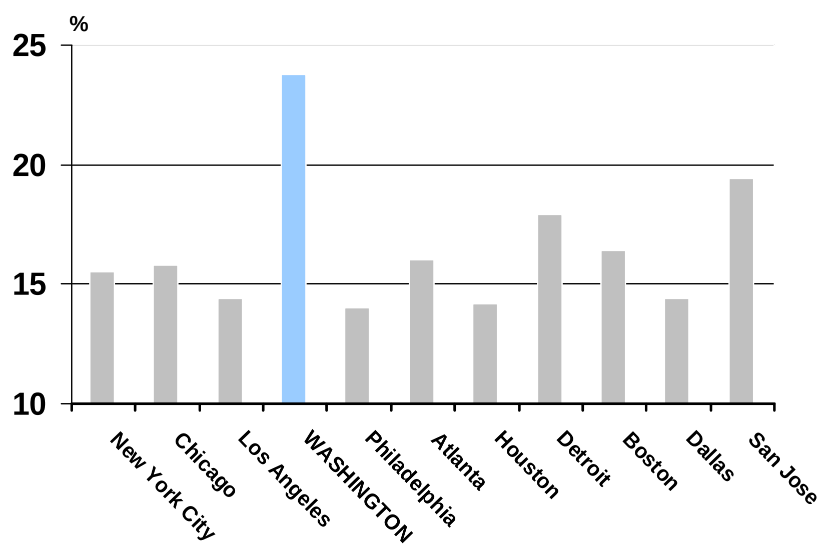


Figure 7B: Percent of Total Non-Federal Jobs in Professional and Business Services, 2003



The Washington area ranks first among the nation's top ten metropolitan areas in the number of jobs in professional, scientific, and technical services; computer systems design and related services; management, scientific and technical consulting services; and scientific research and development services; its employment is these sub-sectors also substantially exceeded the San Jose metro (Silicon Valley) area's employment in these same sub-sectors. This is shown in Figures 8-11 on the following pages.

Figure 8A: Jobs in Professional, Scientific and Technical Services, 2003

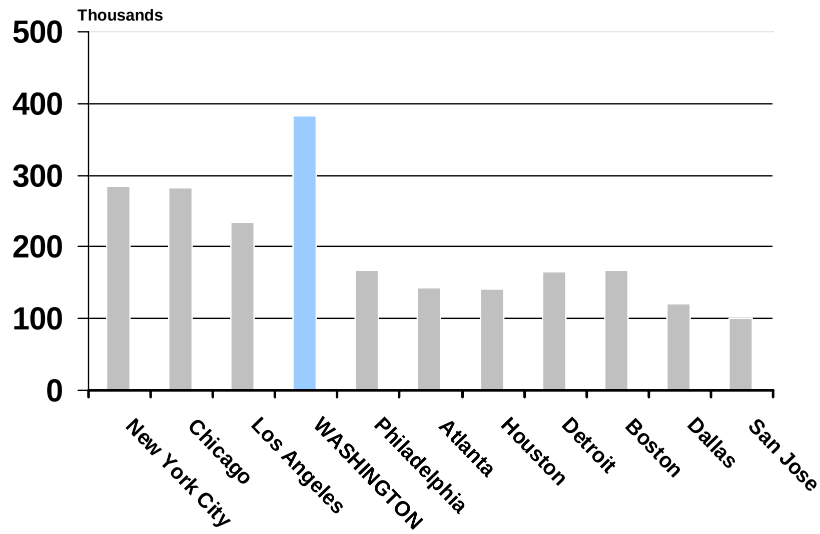


Figure 8B: Percent of Total Non-Federal Jobs in Professional, Scientific and Technical Services, 2003

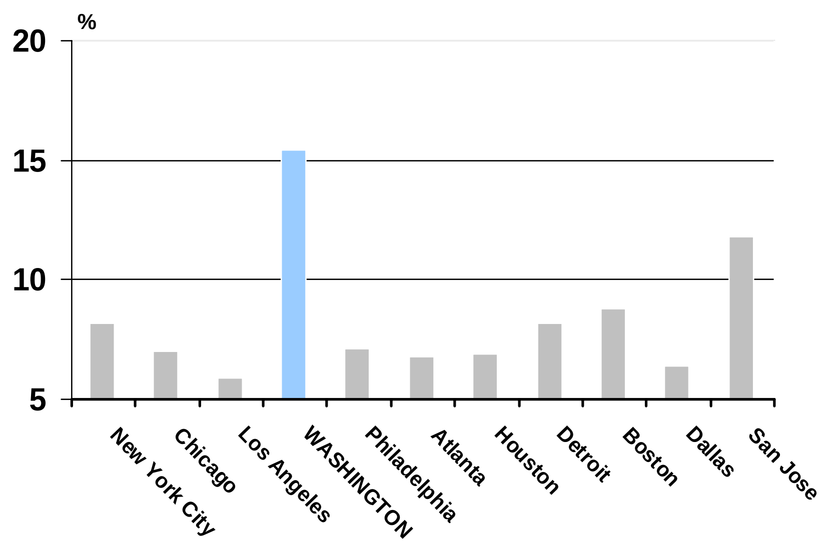


Figure 9A: Jobs in Computer Systems Design and Related Services 2003

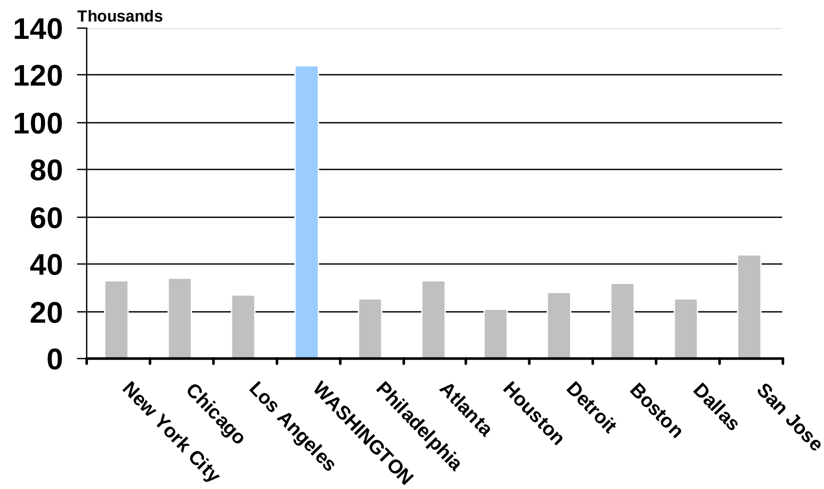


Figure 9B: Percent of Total Non-Federal Jobs in Computer Systems Design and Related Services, 2003

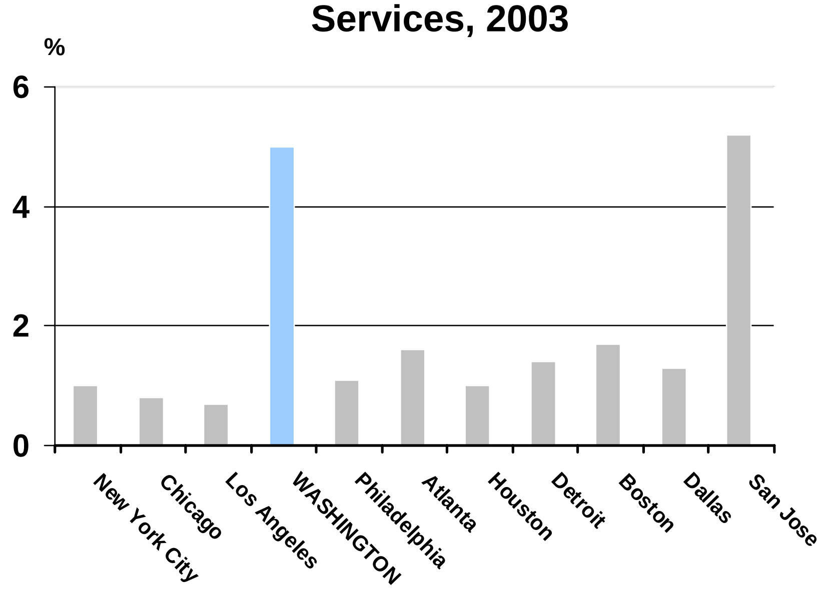


Figure 10A: Jobs in Management, Scientific and Technical Consulting Services 2003

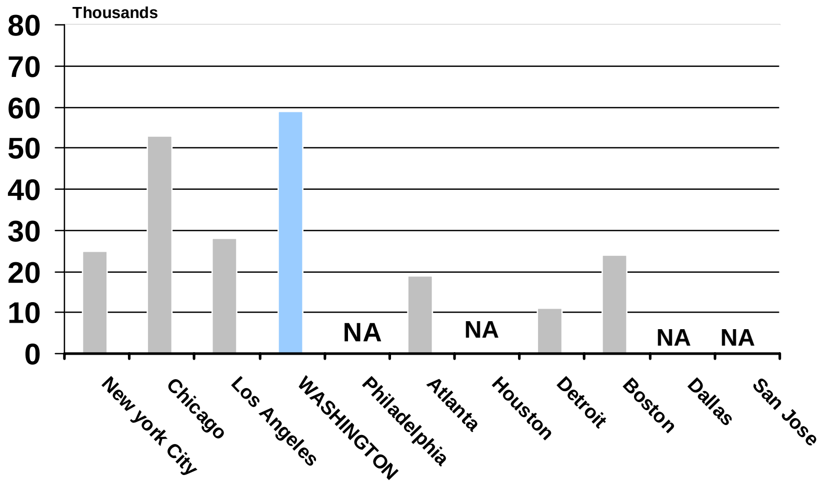


Figure 10B: Percent of Total Non-Federal Jobs in Management, Scientific and Technical Consulting Services, 2003

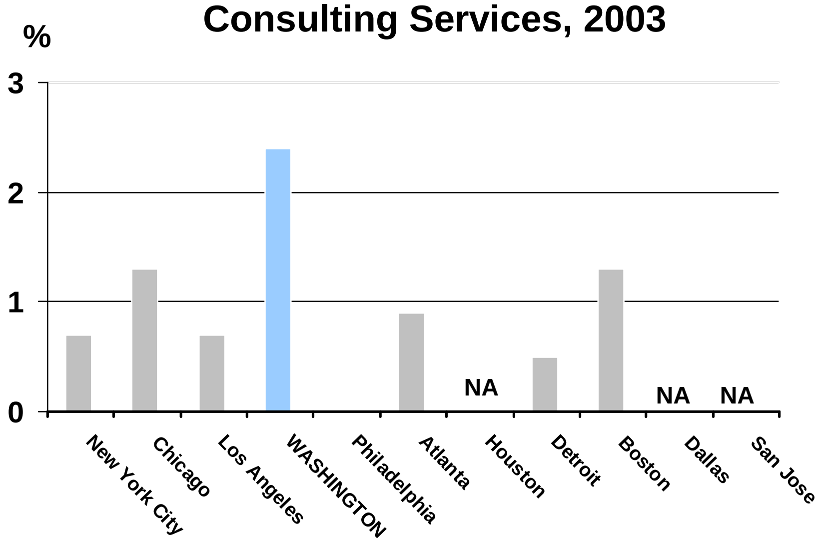


Figure 11A: Jobs in Scientific Research and Development Services 2003

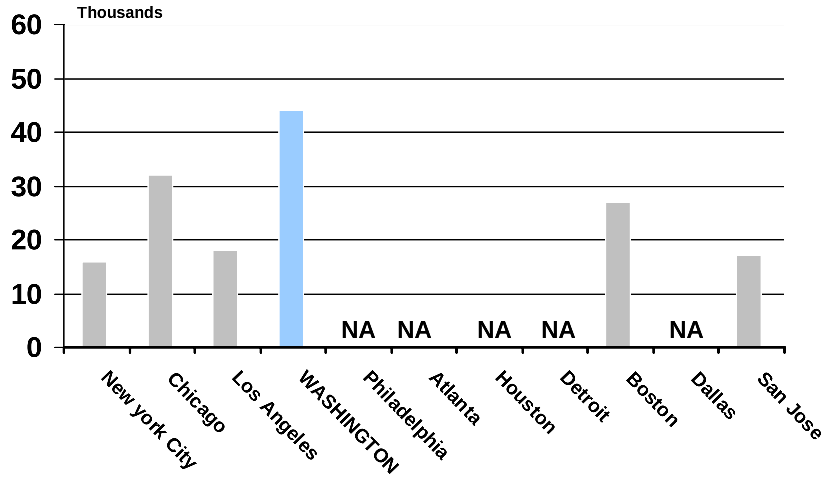
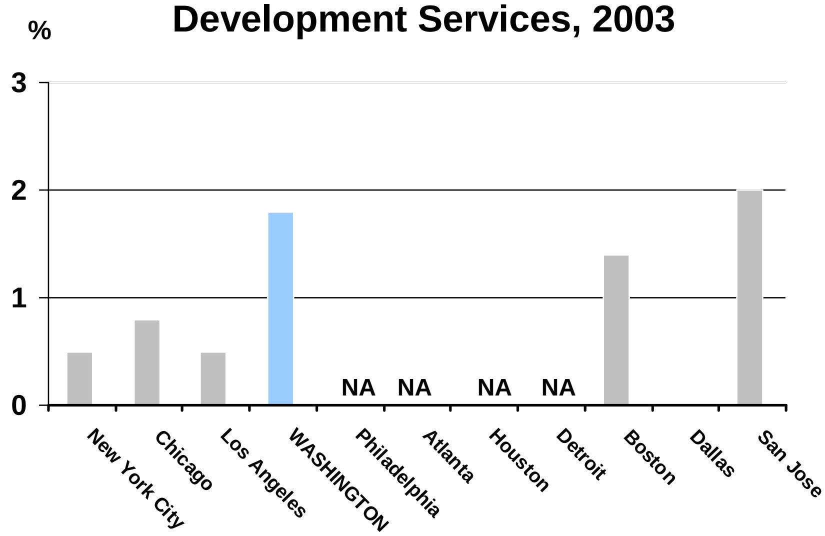


Figure 11B: Percent of Total Non-Federal Jobs in Scientific Research and Development Services, 2003



The Washington area has the lowest number of manufacturing jobs among the ten largest metro areas. What the Washington area economy is and is not is abundantly clear in these job comparisons by sector. Among all the major metropolitan areas, the Washington area has the largest concentration of technology-intensive jobs and the lowest dependency on manufacturing activities. This cluster of technology services is the foundation of the region's economy going forward.

Figure 12A: Jobs in Manufacturing 2003

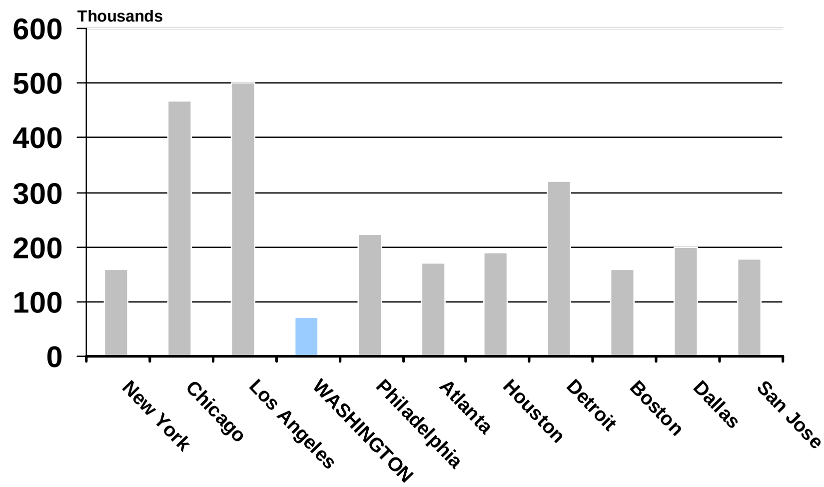
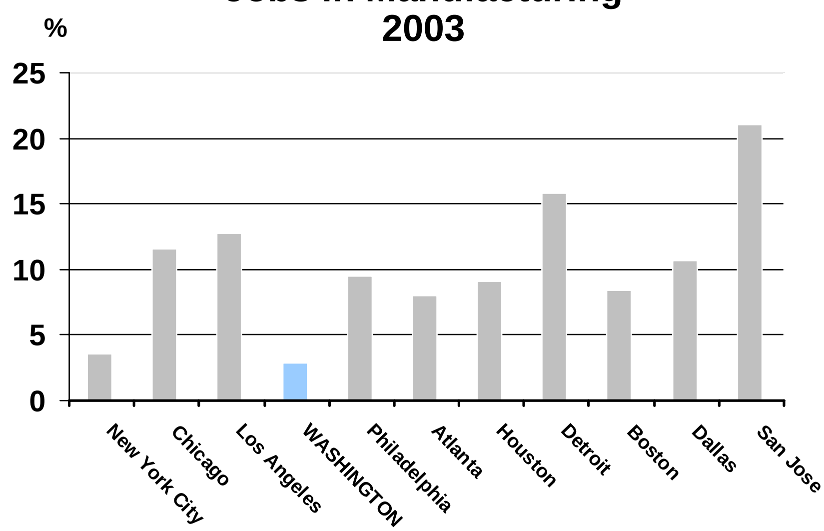


Figure 12B: Percent of Total Non-Federal Jobs in Manufacturing 2003



Appendix 1

Methodology Notes Re: InfoUSA Data and BLS Data

Appendix 1

Methodology Notes

Data files from InfoUSA were used in the analysis of the Downtown and the Downtown BID areas of this study. These data are records of businesses, organizations, institutions with name of business, address, key contact, primary SIC code, codes for employment and sales size of company/organization, and other ancillary data, and the 2003 file contains the new North American Industry Classification System Codes. The 1996 and 2001 files contained 35,308 and 36,810 records respectively, and the 2003 file contained 37,952 records.

The overall citywide analysis also used employment information from the Bureau of Labor Statistics. There are methodological and definitional differences between BLS and InfoUSA. InfoUSA records all addresses and listings for a company as a separate record and therefore a separate company, whereas BLS definitions would only have one company. BLS records the actual number of full time employees as of a specific date of each month. InfoUSA collects number of employees by size category, and does not omit all part time employees. To provide overall consistency with BLS data, InfoUSA data were used for distribution among geographic areas and then adjusted to match city-wide totals from BLS.

The InfoUSA data for government categories is incomplete, as the origin of the information is Yellow Pages listings supplemented by field knowledge. Many government agencies, particularly smaller ones or parts of agencies in leased buildings are missed in the data. Other differences between InfoUSA and BLS result from the method of data collection and the definitions. I.E., InfoUSA is likely to pick up some part-time employment whereas BLS records only full-time employment. The differences between BLS and InfoUSA are demonstrated by comparison of District totals of a few key sectors:

Category	InfoUSA – Nov 2003	BLS – Oct 2003
All Government	68,400	192,700
Legal Services	38,900	35,000
Other Professional And Business Services	66,100	61,100

(a) (1) The InfoUSA data provides a reasonable estimate of jobs in different parts of the city (BID, downtown, and balance of city), especially for all private sectors. Government employment, however, is the weak link in InfoUSA. The Public Administration category is a major part of this problem, in which it seems that InfoUSA has included other miscellaneous categories. Development of government job data from other sources by city location would greatly improve the overall quality of jobs by sector by geography.

EMPLOYMENT BY PART OF THE CITY (INfoUSA)

	1996	2001	2003
Downtown BID	120,100	140,700	174,600
Balance of Downtown	188,540	209,400	204,000
Downtown	308,640	350,100	378,600
Balance of City	315,728	319,481	329,500
City - InfoUSA Totals	624,367	669,581	708,100
BLS Annual Total	623,000	653,700	664,600

Adjusted to Match BLS City Total

	1996	2001	2003
Downtown BID	119837.1	137362.9	163874
Balance of Downtown	188127.2	204433.5	191467.9
Downtown	307964.3	341796.4	355341.8
Balance of City	315036.7	311903.6	309258.2

Adjusted to Match BLS City Total

		(and rounded)		Change
	1996	2001	2003	96-03
Downtown BID	119800	137400	163900	44100
Balance of Downtown	188200	204400	191400	3200
Downtown	308000	341800	355300	47300
Balance of City	315000	311900	309300	-5700
Total City	623000	653700	664600	41600

Appendix 2

Largest Employers by Major Sector in the Downtown BID

(The following pages list the largest 25-50 employers for several selected key sectors in the Downtown BID.)

Company	Address	Total Employees
Architectural, Engineering & Related		
DELEUW CATHER & CO	1133 15TH ST NW # 900	175
MC KISSACK & MC KISSACK	1401 NEW YORK AVE NW # 900	175
HAYES SEAY MATTERN & MATTERN	1030 15TH ST NW # 500	75
HNTB CORP	421 7TH ST NW	75
3DI	1001 G ST NW # 875	35
AMERICAN STANDARDS TESTING BUR	529 14TH ST NW # 2400	35
BECHTEL	1015 15TH ST NW # 700	35
BRENNAN BEER GORMAN MONK	1030 15TH ST NW # 900	35
CONSOLIDATED ENGINEERING	1300 PENNSYLVANIA AVE NW	35
DAVIS CARTER SCOTT LTD	805 15TH ST NW # 1100	35
DELON HAMPTON & ASSOC	800 K ST NW # 720	35
DESIGN COMMUNICATIONS INC	717 D ST NW # 500	35
G WILLIAM CALOMIRIS INVESTMENT	1112 16TH ST NW # 900	35
HEERY INTERNATIONAL INC	1099 14TH ST NW # 101	35
HILLIER GROUP	1444 I ST NW # 1100	35
INTERIOR SYSTEMS INC	1201 15TH ST NW # 2	35
NEXANT	1030 15TH ST NW # 750	35
AQUENT	1333 H ST NW # 630	15
ATELIER ARCHITECTS	1522 K ST NW # 900	15
AUSTIN L SPRIGGS ASSOC	433 MASSACHUSETTS AVE NW	15
AXIS INC	729 15TH ST NW # 9	15
AYERS-SAINT-GROSS	800 I ST NW	15
BADER VENTURES	2 MASSACHUSETTS AVE NW	15
COHEN DIPPELL & EVERIST	1300 L ST NW # 1100	15
DEVROUAX & PURNELL ARCHITECTS	717 D ST NW # 500	15
ERIC COLBERT & ASSOC	717 5TH ST NW	15
ESOCOFF & ASSOC	1030 15TH ST NW # 430	15
LEE & LUI ASSOC INC	638 I ST NW	15
PARSONS BRINCKERHOFF QUADE	1401 K ST NW # 701	15
PENSARE DESIGN GROUP	729 15TH ST NW # 200	15
SWANKE HAYDEN CONNELL	1030 15TH ST NW # 1000	15
	List Total	1,158

Company	Address	Total Employees
Arts, Entertainment & Recreation		
WA SPORTS & ENTRTN	601 F ST NW	175
NATIONAL BUILDING MUSEUM	401 F ST NW	75
NOSTALGIA NETWORK INC	650 MASSACHUSETTS AVE NW	35
SHOW BIZ PRODUCTIONS	1200 G ST NW # 800	35
WASHINGTON SPORTS CLUB	1345 F ST NW	35
1413 SPA LLC	1413 K ST NW	15
AIR & SPACE SMITHSONIAN MAG	750 9TH ST NW # 7100	15
FITNESS CO	555 12TH ST NW # 1	15
HEALTH PROMOTIONS SVC DEPT	624 9TH ST NW	15
NATIONAL MUSEUM-AMERICAN ART	8TH & G ST NW	15
NAUTILUS FITNESS CTR	1101 VERMONT AVE NW	15
WARNER THEATRE	1299 PENNSYLVANIA AVE NW	15
ARCHIVES OF AMERICA ART	750 9TH ST NW # 2200	7
BIZMONT ENTERTAINMENT	601 PENNSYLVANIA AVE NW # 900	7
CITY MUSEUM	801 K ST NW	7
CLUB FITNESS AT WASHINGTON CTR	1001 H ST NW	7
COLUMBIA SQUARE FITNESS CTR	555 13TH ST NW	7
GAO FITNESS & ATHLETICS ASSN	441 G ST NW # B-140	7
INTERNATIONAL SPY MUSEUM STORE	800 F ST NW	7
NATIONAL HEALTH MUSEUMS	1155 15TH ST NW # 810	7
NATIONAL LAW ENFORCEMENT	605 E ST NW	7
NATIONAL MUSEUM OF WOMEN-ARTS	1250 NEW YORK AVE NW	7
NATIONAL MUSEUM-NATURAL HISTRY	CONSTITUTION AVE & 10TH ST NW	7
NATIONAL PORTRAIT GALLERY	8TH & F ST NW	7
PEAK MANAGEMENT GROUP INC	700 13TH ST NW # 990	7
RENAISSANCE SWIM & FITNESS CLB	999 9TH ST NW	7
STRICKLAND & ASHE MANAGEMENT	1090 VERMONT AVE NW # 250	7
BOARDWALK FRIES	50 MASSACHUSETTS AVE NW	3
FORD'S THEATRE	511 10TH ST NW	3
GODSTAR	1234 MASSACHUSETTS AVE NW	3
H STREET PLAYHOUSE	136 H ST NE	3
LODGENET ENTERTAINMENT	16 K ST NW	3
MT VERNON PLAYERS	900 MASSACHUSETTS AVE NW	3
NATIONAL SPORTS ENTERTAINMENT	1455 PENNSYLVANIA AVE NW	3
NATIONAL THEATRE	1321 PENNSYLVANIA AVE NW	3
SHAKESPEARE THEATRE	450 7TH ST NW	3
	List Total	584

Company	Address	Total Employees
Associations		
AARP	601 E ST NW	1000+
AMERICAN PSYCHOLOGICAL ASSN	750 1ST ST NE # 100	750
NATIONAL ASSOCIATION HOME BLDR	PO BOX 34754	375
ASSOCIATION AMERICAN RAILROADS	50 F ST NW	375
AMERICAN PETROLEUM INSTITUTE	1220 L ST NW # 900	175
NATIONAL GOVERNORS ASSN	444 N CAPITOL ST NW # 267	175
NATIONAL ASSOCIATION OF MFRS	1331 PENNSYLVANIA AVE NW # 600	175
UNITED STATES TELECOM ASSN	1401 H ST NW # 600	175
AIR TRANSPORT ASSN	1301 PENNSYLVANIA AVE NW #1100	175
EDISON ELECTRIC INSTITUTE	701 PENNSYLVANIA AVE NW # 3	175
NATIONAL LEAGUE OF CITIES	1301 PENNSYLVANIA AVE NW # 6	175
AMERICAN SOCIETY OF ASSN EXEC	1575 I ST NW	175
NATIONAL ASSOCIATION-REALTORS	700 11TH ST NW	75
AMERICAN HOSPITAL ASSN	325 7TH ST NW # 700	75
AMERICAN INSTITUTE CP A'S	1455 PENNSYLVANIA AVE NW	75
HEALTH INSURANCE ASSN-AMERICA	601 PENNSYLVANIA AVE NW	75
NATIONAL CENTER ON EDUCATION	555 13TH ST NW # 500W	75
AMERICAN ASSOCIATION OF MUSEUM	1575 I ST NW # 400	75
AMERICAN HOTEL & LODGING ASSN	1201 NEW YORK AVE NW # 600	75
AMERICAN MEDICAL ASSN	1101 VERMONT AVE NW # 1200	75
INTERNATIONAL DAIRY FOODS ASSN	1250 H ST NW # 900	75
INTERNATIONAL LIFE SCIENCES	1 THOMAS CIR NW # 900	75
NATIONAL ASSN OF COUNTIES	440 1ST ST NW # 8	75
ASSOCIATIONS-FLIGHT ATTENDANTS	1275 K ST NW # 500	75
BIOTECHNOLOGY INDUSTRY ORG	1225 I ST NW # 400	75
DEFENDERS OF WILDLIFE	1101 14TH ST NW # 1400	75
NATIONAL ACADEMY OF PUBLIC ADM	1100 NEW YORK AVE NW # 1090E	75
NATIONAL ALLIANCE OF BUSINESS	1201 NEW YORK AVE NW	75
NATIONAL ENDOWMENT-DEMOCRACY	1101 15TH ST NW # 700	75
NATIONAL FOOD PROCESSORS ASSN	1350 I ST NW # 300	75
	List Total	4250

Company	Address	Total Employees
Broadcasting (exc Internet) - This is a subcategor of Information		
NATIONAL PUBLIC RADIO	635 MASSACHUSETTS AVE NW # 1	375
TURNER BROADCASTING SYSTEM INC	820 1ST ST NE # 11	375
KTLA	1325 G ST NW # 200	75
POST-NEWSWEEK STATIONS INC	1100 15TH ST NW	75
AMERICOM RADIO BRKRS	730 12TH ST NW	35
AUGUSTINE MARTINEZ UNIVISION	444 N CAPITOL ST NW	35
CANADIAN BROADCASTING CORP	529 14TH ST NW # 500	35
CAPITOL BROADCAST WWCD	730 12TH ST NW	35
CNN AMERICA INC	200 CONSTITUTION AVE NW	35
CULLUM COMMUNICATIONS	1030 15TH ST NW # 1028	35
FOX NEWS CHANNEL	950 PENNSYLVANIA AVE NW	35
GLOBECAST NA INTL SALES	1120 G ST NW	35
HISPANIC RADIO NETWORK	529 14TH ST NW	35
POTOMAC TELEVISION-COMMS	500 N CAPITOL ST NW	35
RADIO VENTURES	1001 PENNSYLVANIA AVE NW	35
RADIODEVISAO PORTUGUESA SA	1120 G ST NW	35
RELIGION & ETHICS NEWSWEEKLY	1333 H ST NW	35
AL JAZEERA SATELLITE CHANNEL	529 14TH ST NW # 927	15
CLEAR CHANNEL WORLDWIDE	1401 I ST NW # 401	15
DIREC TV	12122 CHERRY TREE CROSSING RD	15
JAMESON BROADCASTING	1200 G ST NW # 800	15
PAPPAS TELECASTING CO	1299 PENNSYLVANIA AVE NW	15
FUJI TELECASTING CO	529 14TH ST NW # 330	7
KOREAN BROADCASTING SYSTEM	529 14TH ST NW # 1076	7
MBC TV MUN HUA BROADCASTING	529 14TH ST NW # 1131	7
NIPPON TELEVISION NETWORK CORP	529 14TH ST NW # 1036	7
TOKYO BROADCASTING SYSTEM	529 14TH ST NW # 1088	7
TV ASAHI	529 14TH ST NW # 670	7
UNIVISION WASHINGTON NEWS	444 N CAPITOL ST NW # 601G	7
VIACOM INTERNATIONAL INC	1501 M ST NW # 1100	7
AMERICA'S BLACK FORUM	1333 H ST NW	3
GERMAN TELEVISION AGENCY	529 14TH ST NW # 1199	3
RADIO MUZYKA FAKTY	529 14TH ST NW	3
RMF LTD	529 14TH ST NW	3
THIS IS AMERICA	1333 H ST NW	3
TRIBUNE BROADCASTING CO	1501 K ST NW # 550	3
TV TOKYO 12	529 14TH ST NW # 803	3
	List Total	1,501

Company	Address	Total Employees
Finance and Insurance		
ULLICO INC	111 MASSACHUSETTS AVE NW	750
SUN TRUST BANK	1445 NEW YORK AVE NW # 1	375
US EXPORT IMPORT BANK	811 VERMONT AVE NW	375
AMERICAN COUNCIL OF LIFE INS	1001 PENNSYLVANIA AVE NW	175
BLUE CROSS & BLUE SHIELD	1310 G ST NW # 800	175
MERRILL CORP	1325 G ST NW # B100	175
THOMPSON COBB BAZILIO & ASSOC	1101 15TH ST NW # 400	175
CARLYLE GROUP	1001 PENNSYLVANIA NW # 220S	75
CREDIT UNION NATIONAL ASSN INC	601 PENNSYLVANIA AVE NW # 600	75
FOLGER & NILAN	725 15TH ST NW	75
FOLGER NOLAN FLEMMING DOUGLAS	725 15TH ST NW # 1	75
JOHNSTON LEMON & CO INC	1101 VERMONT AVE NW # 800	75
MORGAN STANLEY	555 11TH ST NW # 5	75
RIGGS NATIONAL CORP	PO BOX 1912	75
US TRUSTEE	901 E ST NW # 700	75
ADVANTAGE HEALTHPLAN INC	624 9TH ST NW # 222	35
BENOVA INC	1411 K ST NW # 800	35
BERTHOLON ROWLAND CORP	734 15TH ST NW # 600	35
DEUTSCHE BANK ALEX BROWN	1399 NEW YORK AVE NW # 500	35
FREDDIE MAC	401 9TH ST NW # 600	35
GLOBAL ENVIRONMENT FUND	1225 I ST NW # 900	35
ICIM SVC	1401 H ST NW # 1000	35
M & T	1350 EYE ST NW # 200	35
NATIONAL INDUSTRY PENSION FUND	1343 L ST NW	35
NATL COMMUNITY RE-INVESTMENT	733 15TH ST NW # 540	35
NEBF INVESTMENTS	1125 15TH ST NW # 401	35
PRECURSOR GROUP INC	901 15TH ST NW # 370	35
TEACHERS INSURANCE & ANNUITY	1101 PENNSYLVANIA AVE NW # 800	35
TEMPUS CONSULTING	1319 F ST NW	35
THAYER CAPITAL PARTNERS	1455 PENNSYLVANIA AVE NW # 350	35
TIAA-CREF	555 12TH ST NW # 700S	35
U S LETTER CARRIERS BENEFIT	100 INDIANA AVE NW # 510	35
WRIGHT & CO	1400 I ST NW # 1100	35
	List Total	3,430

Company	Address	Total Employees
Hotels		
GRAND HYATT WASHINGTON	1000 H ST NW	750
RENAISSANCE WASHINGTON DC HTL	999 9TH ST NW	750
JW MARRIOTT HOTEL PNNSLVNA AVE	1331 PENNSYLVANIA AVE NW	750
CROWNE PLAZA WASHINGTON DC	1375 K ST NW	375
HILTON	1001 16TH ST NW	375
HOTEL WASHINGTON	515 15TH ST NW	375
WILLARD INTER-CONTINENTAL HTLS	1401 PENNSYLVANIA AVE NW	375
MARRIOTT AT METRO CTR	775 12TH ST NW	375
WYNDHAM WASHINGTON DC	1400 M ST NW	375
ST REGIS WASHINGTON DC	923 16TH ST NW	175
WASHINGTON PLAZA HOTEL	10 THOMAS CIR NW	175
HENLEY PARK HOTEL	926 MASSACHUSETTS AVE NW	175
HOLIDAY INN WASHINGTON DC	415 NEW JERSEY AVE NW	175
WASHINGTON COURT MOTEL	525 NEW JERSEY AVE NW	175
4 POINTS BY SHERATON	1201 K ST NW	175
HILTON GARDEN INN	815 14TH ST NW	175
JEFFERSON HOTEL	1200 16TH ST NW	175
HOTEL GEORGE	15 E ST NW	75
RED ROOF INN	500 H ST NW	75
HARRINGTON HOTEL	436 11TH ST NW	75
HOLIDAY INN WASHINGTON DOWNTWN	1155 14TH ST NW	75
RESIDENCE INN-WSTN DC VRMT AVE	1199 VERMONT AVE NW	75
HAY-ADAMS HOTEL	16TH ST & H ST NW	75
BEST WESTERN INN	724 3RD ST NW	35
HYATT HOTELS & RESORTS	400 NEW JERSEY AVE NW	35
COURTYARD-WASHINGTON CNVTN CTR	900 F ST NW	35
WILLARD	1401 PENNSYLVANIA AVE NW	35
HILTON	1475 MASSACHUSETTS AVE NW	35
HYATT HOTELS & RESORTS	1555 I ST NW	15
GEORGE HOTEL	15 E ST NW	15
WASHINGTON COURT HOTEL	525 NEW JERSEY AVE NW	15
HOTEL MONACO	700 F ST NW	15
CAPITAL CITY HOTEL	1155 14TH ST NW	15
CROWN PLAZA	1001 14TH ST NE	15
HOTEL SOFITEL	806 15TH ST NW	15
KIMPTON HOTEL & RESTAURANT	1101 PENNSYLVANIA AVE	15
SWISS INN HOTEL	1204 MASSACHUSETTS AVE NW	15
	List Total	6,660

Company	Address	Total Employees
Information		
U S GAO PUBLISHING SVC	441 G ST NW	1000+
WASHINGTON POST CO	1150 15TH ST NW	1000+
CONFERENCE & FACILITIES MGMT	1201 16TH ST NW # 520	750
NATIONAL PUBLIC RADIO	635 MASSACHUSETTS AVE NW # 1	375
REUTERS NEWS	1333 H ST NW # 5	375
TURNER BROADCASTING SYSTEM INC	820 1ST ST NE # 11	375
EAGLE	1 MASSACHUSETTS AVE NW	175
EDGAR DIRECT	601 PENNSYLVANIA AVE NW	175
HANLEY-WOOD INC	1 THOMAS CIR NW # 600	175
MC GRAW-HILL CO	1200 G ST NW # 200	175
MC KINSEY & CO	600 14TH ST NW # 300	175
NATIONAL JOURNAL GROUP INC	1501 M ST NW # 300	175
POST-NEWSWEEK TECH MEDIA GROUP	10 G ST NE # 500	175
SBC COMMUNICATIONS INC	1401 I ST NW # 1100	175
TELEPORT COMMUNICATIONS GROUP	1331 F ST NW # 925	175
WILSON QUARTERLY	1300 PENNSYLVANIA AVE NW	175
AGENCE FRANCE PRESSE	1015 15TH ST NW # 500	75
BLOOMBERG BUSINESS NEWS	1399 NEW YORK AVE NW	75
KNIGHT-RIDDER INC	529 14TH ST NW # 790	75
KRT NEWS SVC	529 14TH ST NW # 790	75
KTLA	1325 G ST NW # 200	75
SMITHSONIAN MAGAZINE	750 9TH ST NW # 7100	75
UNITED PRESS INTL	1510 H ST NW # 600	75
USA TODAY WASHINGTON DC	1100 NEW YORK AVE NW	75
BOND BUYER	1325 G ST NW # 900	35
CAPITOL HILL PUBLISHING CORP	733 15TH ST NW # 1140	35
CHECKBOOK MAGAZINE	733 15TH ST NW # 820	35
DAILY PRESS	1325 G ST NW # 200	35
ENERGY DAILY	529 14TH ST NW	35
LOS ANGELES TIMES WASHINGTON	1150 15TH ST NW	35
MEDILL NEWS SVC	1325 G ST NW # 730	35
NATURAL GAS WEEK	1401 NEW YORK AVE NW	35
RTNDA	1600 K ST NW # 700	35
SCRIPPS HOWARD NEWS SVC	1090 VERMONT AVE NW # 1000	35
	List Total	6,575+

Company	Address	Total Employees
Legal - Top 70 (75+ employees)		
HOGAN & HARTSON LLP	555 13TH ST NW # 1300	1,210
ARNOLD & PORTER	555 12TH ST NW # 812	1,134
COVINGTON & BURLING	1201 PENN AVE NW # 800	835
BENINCA HEINZ-JURGEN	1111 PENNSYLVANIA AVE NW	750
FINNEGAN HENDERSON	1300 I ST NW	708
HOWERY SIMON ARNOLD & WHITE	1299 PENNSYLVANIA AVE NW	694
MORGAN LEWIS BOCKUS	1111 PENNSYLVANIA AVE NW	611
SKADDEN ARPS SLATE MEAGHER	1440 NEW YORK AVE NW # 600	605
VENABLE BAETJER & HOWARD	1201 NEW YORK AVE NW # 1000	536
JONES DAY	51 LOUISIANA AVE NW	536
CROWELL MORING LLP	1001 PENNSYLVANIA AVE NW # 10	532
WILLIAMS & CONNOLLY LLP	725 12TH ST NW	502
MC DERMOTT WILL & EMERY	600 13TH ST NW # 1200	465
LATHAM WATKINS	555 11TH ST NW	382
KIRKLAND & ELLIS	655 15TH ST NW # 1200	375
PAUL HASTINGS JANOFSKY	1299 PENNSYLVANIA AVE NW # 10	375
VERNER LIIPFERT BERNHARD	901 15TH ST NW # 700	375
WINSTON & STRAWN	1400 L ST NW # 800	375
REED SMITH SHAW & MC CLAY	1301 K ST NW # 1100E	366
FRIED FRANK HARRIS SHRIVER	1001 PENNSYLVANIA AVE NW # 800	312
SUTHERLAND ASBILL & BRENNAN	1275 PENNSYLVANIA AVE NW # 600	295
BALLARD SPAHR ANDREWS	601 13TH ST NW # 1000S	228
MILLER & CHEVALIER	655 15TH ST NW	224
O'MELVENY & MYERS	555 13TH ST NW # 500W	210
KING AND SPALDING	1730 PENNSYLVANIA AVE NW	210
NIXON PEABODY	401 9TH ST NW	206
BAKER BOTTS	1299 PENNSYLVANIA AVE NW # 12	175
BANNER & WITCOFF	1001 G ST NW # 1100	175
BRYAN CAVE LAW FIRM	700 13TH ST NW # 700	175
CAPLIN & DRYSDALE CHARTERED	1 THOMAS CIR NW # 1100	175
COHEN MILSTEIN HAUSFELD & TOLL	1100 NEW YORK AVE NW # 500	175
DRINKER BIDDLE & REATH	1500 K ST NW # 1100	175
FTI CORP	1201 I ST NW # 400	175
FULBRIGHT & JAWORSKI	801 PENNSYLVANIA AVE NW	175
GARDNER CARTON & DOUGLAS	1301 K ST NW # 900E	175
GILBERT HEINTZ & RANDOLPH	1100 NEW YORK AVE NW # 7	175
HALE & DORR	1455 PENNSYLVANIA AVE NW #1000	175
KAYE SCHOLER LLP	901 15TH ST NW # 1100	175
KELLER & HECKMAN	1001 G ST NW # 500W	175
MANATT PHELPS & PHILLIPS	1501 M ST NW # 700	175
PERKINS COIE	607 14TH ST NW # 800	175
SONNENSCHEIN NATH & ROSENTHAL	1301 K ST NW # 600E	175
VINSON ELKIINS	1455 PENNSYLVANIA AVE NW	161
SQUIRE SAUNDERS & DEMPSEY	PO BOX 407	155
POWELL GOLDSTEIN FRAZER MURPHY	1001 PENNSYLVANIA AVE NW	149
SPRIGGS & HOLLINGSWORTH	1350 I ST NW # 900	140
THELEN REID & PRIEST	701 PENNSYLVANIA AVE NW # 800	140
WATT TIEDER HOFFAR FITZGERALD	601 PENNSYLVANIA AVE NW # 900	140

BEVERIDGE & DIAMOND	1350 I ST NW # 700	118
ALSTON & BIRD	601 PENNSYLVANIA AVE NW # 10	115
JENNER & BLOCK	601 13TH ST NW # 1200	115
KENYON & KENYON	1500 K ST NW # 700	109
MINTZ LEVIN COHEN FERRIS	701 PENNSYLVANIA AVE NW # 900	106
BAACH ROBINSON & LEWIS PLLC	1 THOMAS CIR NW # 200	75
BAKER & DANIELS	805 15TH ST NW # 700	75
BREDHOFF & KAISER	805 15TH ST NW # 10000	75
CADWALADER WICKERSHAM & TAFT	1201 F ST NW # 1100	75
DEBEVOISE & PLIMPTON	555 13TH ST NW # 1100E	75
DORSEY & WHITNEY	1001 PENNSYLVANIA AVE NW #400S	75
GILBERG & KIERNAN	1250 I ST NW # 600	75
HYMAN PHELPS & MC NAMARA	700 13TH ST NW # 1200	75
JACOBSON HOLMAN	400 7TH ST NW # 600	75
KILPATRICK & STOCKTON	607 14TH ST NW # 900	75
MC GUINESS NORRIS & WILLIAMS	1015 15TH ST NW # 1200	75
OBER KALER GRIMES & SHRIVER	1401 H ST NW # 500	75
ROPES & GRAY	1301 K ST NW # 800E	75
ROTHWELL FIGG ERNST & MANBECK	1425 K ST NW # 800	75
SAGAMORE ASSOCIATES INC	805 15TH ST NW # 700	75
SHEARMAN & STERLING	801 PENNSYLVANIA AVE NW # 900	75
SHOOK HARDY & BACON	600 14TH ST NW # 800	75
TROUTMAN SANDERS	401 9TH ST NW # 1000	75
WILSON ELSER MOSKOWITZ EDELMAN	1341 G ST NW # 500	75
WOMBLE CARLYLE	1401 I ST NW # 700	75
	List Total	18,800+

Note: This list of legal firms from InfoUSA has been supplemented with data from the Washington Business Journal 2004 Book of Lists

Company	Address	Total Employees
Mgmt, Scientific & Technical Consulting		
CPB	401 9TH ST NW	175
ENVISION CORP	1110 VERMONT AVE NW # 300	175
GENERAL ELECTRIC CO	1299 PENNSYLVANIA AVE NW #1100	175
ADAMS HUSSEY & ASSOC	1400 I ST NW # 650	75
GALLUP	901 F ST NW	75
INFOTECH STRATEGIES	1341 G ST NW # 1100	75
ORGANIZATIONAL STRATEGIES INC	1331 PENNSYLVANIA AVE NW #1213	75
TRANS MANAGEMENT SYSTEMS CORP	1025 VERMONT AVE NW	75
WESTLAW TRAINING CTR	901 15TH ST NW # 200	75
ALAN TUCKER INC	1501 K ST NW	35
BARRY SECURITY INC	750 1ST ST NE # 940	35
CACI INC	1301 K ST NW # 575W	35
E S INC	1100 15TH ST NW # 300	35
ENGQUIST PELRINE & POWELL	1100 NEW YORK AVE NW # 250	35
FINCA INTL INC	1101 14TH ST NW # 11	35
INTERNATIONAL TRADE RESOURCES	1001 G ST NW # 430	35
JEFFERSON CONSULTING GROUP	1401 K ST NW # 900	35
LEARNING SYSTEMS INTL	1500 K ST NW # 350	35
LEE HECHT HARRISON INC	1399 NEW YORK AVE NW # 725	35
LUCIDEA	529 14TH ST NW	35
PROGRAM MANAGEMENT ASSOC	1030 15TH ST NW # 840	35
QUADEL CONSULTING CORP	1250 I ST NW	35
TRADE COMPASS INC	1510 H ST NW	35
WA ADVISORY GROUP	1275 K ST NW # 1025	35
	List Total	1,500

Company	Address	Total Employees
Publishing (exc Internet) -- This is a subcategory of Information		
WASHINGTON POST CO	1150 15TH ST NW	1000+
REUTERS NEWS	1333 H ST NW # 5	375
EAGLE	1 MASSACHUSETTS AVE NW	175
HANLEY-WOOD INC	1 THOMAS CIR NW # 600	175
MC GRAW-HILL CO	1200 G ST NW # 200	175
NATIONAL JOURNAL GROUP INC	1501 M ST NW # 300	175
POST-NEWSWEEK TECH MEDIA GROUP	10 G ST NE # 500	175
WILSON QUARTERLY	1300 PENNSYLVANIA AVE NW	175
KNIGHT-RIDDER INC	529 14TH ST NW # 790	75
SMITHSONIAN MAGAZINE	750 9TH ST NW # 7100	75
USA TODAY WASHINGTON DC	1100 NEW YORK AVE NW	75
ADVERTISING AGE	529 14TH ST NW # 814	35
BOND BUYER	1325 G ST NW # 900	35
CAPITOL HILL PUBLISHING CORP	733 15TH ST NW # 1140	35
CHECKBOOK MAGAZINE	733 15TH ST NW # 820	35
CRAIN COMMUNICATIONS INC	814 NATIONAL PRESS BUILDING	35
DAILY PRESS	1325 G ST NW # 200	35
E & E PUBLISHING	122 C ST NW # 722	35
ENERGY DAILY	529 14TH ST NW	35
INSLAW INC	1156 15TH ST NW # 800	35
LEADERSHIP DIRECTORIES INC	1001 G ST NW # 200E	35
LOS ANGELES TIMES WASHINGTON	1150 15TH ST NW	35
MEDILL NEWS SVC	1325 G ST NW # 730	35
NATURAL GAS WEEK	1401 NEW YORK AVE NW	35
NEW REPUBLIC	1331 H ST NW # 700	35
PUBLISHING	1201 16TH ST NW # 710	35
RESEARCH INSTITUTE OF AMERICA	1325 G ST NW # 910	35
RTNDA	1600 K ST NW # 700	35
SCRIPPS HOWARD NEWS SVC	1090 VERMONT AVE NW # 1000	35
TIME MAGAZINE	555 12TH ST NW # 600	35
ASAHI SIMBUN AMERICA INC	1022 NATIONAL PRESS BUILDING	15
BIZREFERENCE.COM	1333 GREEN CT NW	15
CHRISTIAN SCIENCE MONITOR	910 16TH ST NW # 200	15
CONGRESS DAILY	1501 M ST NW # 300	15
COPLEY NEWS SVC	529 14TH ST NW # 1100	15
DC ONE MAGAZINE	901 F ST NW	15
FINANCIAL TIMES	700 13TH ST NW # 555	15
GOVERNMENT EXECUTIVE	1501 M ST NW # 300	15
INSIDE NRC	1200 G ST NW # 1000	15
NEWSPAPER GUILD	501 3RD ST NW # 250	15
STAR TRIBUNE	529 14TH ST NW # 420	15
THOMSON MEDIA	1325 G ST NW # 900	15
TOKYO SHIMBUN	529 14TH ST NW # 1012	15
YOMIURI SHIMBUN	529 14TH ST NW # 802	15
AEROSPACE PROPULSION	1200 G ST NW	7
CHUNICHI SHIMBUN	529 14TH ST NW # 1012	7
FORT LAUDERDALE SUN SENTINEL	1325 G ST NW	7
INC MAGAZINE	529 14TH ST NW	7
LONDON DAILY NEWS	1110 VERMONT AVE NW	7
NEW DIMENSIONS	1221 MASSACHUSETTS AVE NW	7
WASHINGTON BOOK REVIEW	1399 NEW YORK AVE NW	7
WASHINGTON-BALTIMORE NEWSPAPER	1100 15TH ST NW	7
	List Total	3700+

Company	Address	Total Employees
Real Estate & Rental & Leasing		
INTERNATIONAL TRADE CTR	1300 PENNSYLVANIA AVE NW	375
WILLIAM C SMITH & CO INC	1220 L ST NW # 300	175
PRUDENTIAL	1325 G ST NW # 600	175
C B RICHARD ELLIS	555 11TH ST NW # 300	175
JOHN AKRIDGE MANAGEMENT CO	601 13TH ST NW # 300N	75
BARNES MORRIS & PARDOE INC	601 13TH ST NW # 800N	75
STAUBACH CO	401 9TH ST NW # 1050	35
JULIEN J STUDLEY INC	555 13TH ST NW # 420E	35
J M ZELL PARTNERS LTD	5513 ST NW # 650E	35
HINES INTERESTS LTD	555 13TH ST NW # 1020E	35
FAST OFFICE	1333 H ST NW	35
BORGER MANAGEMENT INC	1111 14TH ST NW # 200	35
TRAMMELL CROW CO	750 1ST ST NE # 250	15
TOTAL MANAGEMENT INC	1339 GREEN CT NW # 4	15
TECHWORLD PLAZA	800 K ST NW	15
SOCIETY OF IND & OFC REALTORS	1201 NEW YORK AVE NW # 350	15
S C HERMAN & ASSOC	1120 VERMONT AVE NW # 900	15
RETA	1010 VERMONT AVE NW # 400	15
MASSACHUSETTS HOUSE	1234 MASSACHUSETTS AVE NW #106	15
MANULIFE REAL ESTATE	555 12TH ST NW	15
GE CAPITAL REAL ESTATE	1201 F ST NW # 600	15
GALE CO	1099 14TH ST NW	15
FRED EZRA CO	1350 I ST NW # 1280	15
FIFTEEN HUNDRED MASS AVE APTS	1500 MASSACHUSETTS AVE NW	15
CHARLES E SMITH COML REALTY	1501 K ST NW # 300	15
CARR AMERICA	601 E ST NW	15
C & R REALTY	1101 F ST NW	15
BGW LTD PARTNERSHIP	1425 K ST NW	15
	List Total	1,492

Company	Address	Total Employees
Restaurants		
GREAT WALL SEAFOOD RESTAURANT	627 I ST NW	175
ELLA'S WOOD-FIRED PIZZA	ON 9TH ST BETWEEN F&G W	175
PLANET HOLLYWOOD	1101 PENNSYLVANIA AVE NW	175
CAPITOL CITY BREWING CO	1100 NEW YORK AVE NW	175
M & S GRILL	600 13TH ST NW	175
OLD EBBITT GRILL	675 15TH ST NW	175
RED SAGE RESTAURANT	605 14TH ST NW	175
COEUR DE LION RESTAURANT	926 MASSACHUSETTS AVE NW	75
LEGAL SEA FOODS	704 7TH ST NW	75
ORTANIQUE RESTAURANT	730 11TH ST NW	75
RUBY TUESDAY	712 7TH ST NW	75
CAPTIOL CITY BREWING CO	2 MASSACHUSETTS AVE NE # 1	75
701 PA AVE RESTAURANT	701 PENNSYLVANIA AVE NW	75
AUSTIN GRILL	750 E ST NW	75
CAFE ATLANTICO	405 8TH ST NW	75
CAPITAL GRILLE	601 PENNSYLVANIA AVE NW	75
CAUCUS ROOM	401 9TH ST NW	75
DISTRICT CHOPHOUSE & BREWERY	509 7TH ST NW	75
GORDON BIERSCH	900 F ST NW	75
JALEO	480 7TH ST NW	75
JORDAN'S	1300 PENNSYLVANIA AVE NW	75
OCCIDENTAL GRILL	1475 PENNSYLVANIA AVE NW	75
POSTE BRASSERIE	555 8TH ST NW	75
TENPENH	1001 PENNSYLVANIA AVE NW	75
BOBBY VAN'S STEAKHOUSE	809 15TH ST NW	75
BUTTERFIELD 9 RESTAURANT	600 14TH ST NW	75
D C COAST RESTAURANT	1401 K ST NW	75
FAST EDDIES	1520 K ST NW	75
GEORGIA BROWN'S RESTAURANT	950 15TH ST NW	75
BIS	15 E ST NW	75
	List Total	2950

Appendix 3

Commuting to Jobs in the District, 1970 – 2000

Commuting to Jobs in the District of Columbia				
Jurisdiction of Residence	**1970**	**1980**	**1990**	**2000**
District of Columbia	**267,267**	**234,069**	**236,734**	**190,566**
Calvert	**684**	**1,656**	**3,369**	**3,967**
Charles	**2,964**	**6,681**	**9,976**	**10,785**
Frederick	**689**	**1,425**	**2,619**	**3,025**
Montgomery	**71,362**	**82,478**	**103,320**	**99,672**
Prince George's	**104,654**	**128,895**	**141,590**	**126,138**
MD Part of PMSA	**180,353**	**221,135**	**260,874**	**243,587**
Arlington	**37,724**	**40,290**	**43,842**	**42,263**
Clarke	**73**	**47**	**43**	**156**
Culpeper	**78**	**170**	**247**	**260**
Fairfax (1)	**50,180**	**83,760**	**97,711**	**92,235**
Fauquier	**282**	**723**	**997**	**1,139**
King George	**104**	**152**	**164**	**242**
Loudoun	**1,023**	**2,878**	**3,461**	**5,843**
Prince William (2)	**4,180**	**11,343**	**14,602**	**16,543**
Spotsylvania (3)	**302**	**895**	**1,687**	**2,494**
Stafford	**376**	**1,610**	**2,408**	**3,310**
Warren	**80**	**164**	**305**	**376**
Alexandria	**17,957**	**24,282**	**23,557**	**23,292**
Northern Virginia	**112,359**	**166,314**	**189,024**	**188,153**
Berkeley	**51**	**184**	**305**	**503**
Jefferson	**150**	**504**	**532**	**592**
W VA Part	**201**	**688**	**837**	**1,095**
Total from PMSA	**560,180**	**622,206**	**687,469**	**623,401**
From Outside PMSA:				
Baltimore PMSA	**9,152**	**19,847**	**27,122**	**33,035**
Other MD	**295**	**1,201**	**2,699**	**2,857**
Other VA	**NA**	**NA**	**2,815**	**3,100**
Other WVA	**NA**	**NA**	**397**	**255**
PA	**NA**	**NA**	**1,507**	**1,032**
Elsewhere	**NA**	**NA**	**8,525**	**7,998**
From Outside PMSA	**9,447**	**21,048**	**43,065**	**48,277**
Total In-Commuters (Jobs)	**569,627**	**643,254**	**730,534**	**671,678**
Maryland In-Commuters	**189,800**	**242,183**	**290,695**	**279,479**
Virginia In-Commuters	**112,359**	**166,314**	**191,839**	**191,253**
Percent of DC Jobs held by DC residents	**46.9%**	**36.4%**	**32.4%**	**28.4%**
Percent of DC Jobs held by Maryland residents	**33.3%**	**37.6%**	**39.8%**	**41.6%**
Percent of DC Jobs held by Virginia residents	**19.7%**	**25.9%**	**26.3%**	**28.5%**
Source: U.S. Census				
(1) Includes Fairfax City and Falls Church				
(2) Includes Manassas and Manassas Park				
(3) Includes Fredericksburg				