State of the Workforce 2024

PRINCE GEORGE'S COUNTY

AUGUST 2024

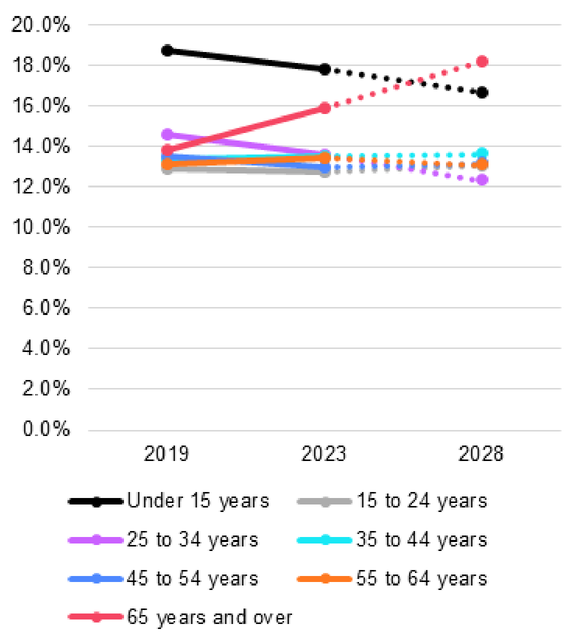
Contents

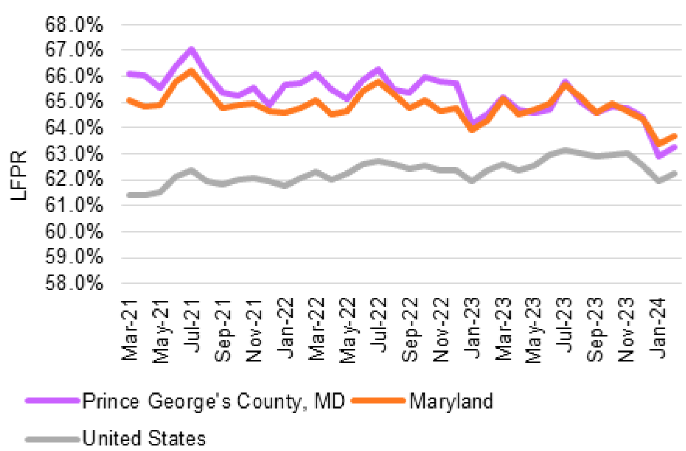
Executive Summary

Prince George's County is facing a labor market dramatically different from that of five years ago. With a population of 964,073 in 2023 and an accelerating growth rate, Prince George's County is expected to surpass one million people by 2028. However, although the population is growing, the projected growth for retirement-age individuals outpaces that of other age cohorts, while the populations of children (Under 5 and 5-9) are projected to decline. This demographic shift means the proportion of young people relative to the total population is shrinking, whereas the share of older individuals is growing.

These age dynamics are driving the Labor Force Participation Rate (LFPR) downwards in both Maryland and Prince George's County and indicate that employers face the impending challenge of adapting to an aging workforce. Furthermore, the COVID-19 pandemic continues to impact the labor force through the deterioration of the quality of the talent pipeline: college completions are declining; K-12 absenteeism and dropout rates are rising; mental health concerns and drug overdoses are increasing; and businesses report notable differences in the soft skills and social development of new workforce entrants.

After analyzing the breadth of data featured in this report, Lightcast emphasizes that the challenges Prince George's County is confronting cannot be solved alone. This situation requires doubling down on relationships and partnerships, facing and tackling uncomfortable issues, and sharing responsibility for what is ultimately a noble goal: improving the work and life prospects of the people of Prince George's County.





Recommendations

Subject	Recommendation	Detail
Policy	Become a data advocate.	Support the Workforce Transformation Policy Council's (WTPC) call for more resources for metrics that track value, not just compliance. Encourage state efforts to mandate data sharing.[1]
	Encourage the State workforce board to adopt methodology to identify priority occupations.	The workforce system needs a methodology that can identify priority occupations (and thus programs) for investment based on time-sensitive labor market metrics and regional considerations with flexibility to reflect changing priorities regarding wages, pathway potential, job flexibility & stability, etc.
Programming	Improve "work readiness."	A prevailing concern emerged regarding the effectiveness of job fairs in connecting employers with qualified candidates. Create work readiness through "World of Work" rotations for youth, job candidates, and trainees, exposing them to various pathways and the skills and expectations associated with them. Implement targeted workshops that equip candidates with the ability to speak confidently about their suitability for specific roles or industries.
	Improve employer access to vetted candidates.	Provide electronic access to vetted and screened profiles of candidates. Implement a monthly electronic resume drop by email to select industry partners to prioritize the presentation of the most job-ready candidates. For promising yet unsuccessful candidates, a "Stock Pond" initiative would refer them to support services through the Public Workforce System. These candidates will receive targeted skill polishing to bridge identified gaps, enhancing their readiness for employment.
	Redeploy workers.	Certain subsectors of the Information & Computer cluster are declining, while others are growing. Publishers of newspapers & periodicals and wired telecommunications carriers have shed thousands of jobs in the region. Redeploy these workers into the healthy and growing subsectors of the cluster by identifying the most common skills gaps between the previous and aspirational roles and create targeted reskilling and upskilling programs to address these gaps.

1 JFF Workforce Policy Transformation Council, "Driving Improved Workforce Outcomes Through Data Access, Alignment, and Integration," https://info.jff.org/hubfs/Policy/240520-Policy-Report-WTPCReportOnData-JA-v3.pdf?_gl=1*1hs6kwh*_gcl_au*MTcwNTAyMzMxNi4xNzIwNDQzNTA3*_ga*MTk2NDgxMzAyMC4xNzIwNDQzNTA0*_ga_3YKPLRZBRG*MTcyMDQ0MzUwMy4xLjEuMTcyMDQ0MzUwNC41OS4wLjA

Recommendations

Subject	Recommendation	Detail
Partnerships & Collaboration Programming	Improve CTE participation & Placement.	Work with the public school system to brainstorm ways to increase interest in continued CTE progression among students. Work with the K-12 system to make a concerted effort to 1) identify CTE students who pass Technical Skills Assessments (TSAs) and 2) help them find employment opportunities related to their CTE program of interest.
	Analyze Black unemployment.	Prince George's County's Black population has the highest unemployment rate despite having noticeably higher educational attainment than the Hispanic population. However, the Black population has lower degree attainment than the White and Asian populations. Focus on degree completion programs such as the initiative of OneSpartanburg – Re:Degree. Black employment is overrepresented in 3 of the top 4 industries with highest unemployment (Retail, Accommodation & Food Services, and Administrative & Support). Encourage soft and transferable skill development to maximize labor market flexibility, enabling wider employment options when facing job loss. Work with service providers and employers to discover the other causes of this high unemployment beyond lower educational attainment.
	Close the achievement gap.	Establish collaborative programs between the workforce system and K-12 schools serving Hispanic communities which typically have high absenteeism and dropout rates. Link CTE to employment opportunities by strengthening connections between CTE programs and local employers. Integrate ESL language support within CTE programs to ensure English language proficiency does not hinder students' ability to succeed in vocational training and certification programs. Expand ESL options within Eligible Training Provider List (ETPL) and Local Training Provider List (LTPL) to provide language instruction aligned with vocational training.
	Create Aging Workforce Task Force.	Establish programs to connect recently retired individuals with K-12 schools, colleges, and talent development programs as mentors, instructors, and trainers. Encourage small business clients to collaborate with the SBDC to develop succession plans that ensure business continuity after retirement. Identify challenges faced by older workers in the workplace, such as age discrimination, adapting to technological advancements, and health-related concerns to promote age inclusivity.
	Create Workforce Behavioral Health Initiative	Connect employers with experts to build awareness and skills. Liaise with the K-12 system to implement pragmatic measures to increase resiliency in the future workforce – such as a public school cell phone/social media ban and integrating physical education with mindfulness and meditation practices.
	Leverage the Veteran Pipeline.	Utilize the Department of Defense SkillBridge Program. Leverage labor market information (LMI) to assist with veteran career coaching. Partner with veteran-friendly employers.

Recommendations

Subject	Recommendation	Detail
Organizational Improvement	Deputize staff.	Deputize staff with the authority to make strategic decisions, enabling Prince George's County to foster speed and agility, responsiveness, and proactive decision-making, ultimately driving more effective and timely strategic outcomes.
	Curate deeper data.	In addition to advocating for more value-driven metrics, Prince George's County Workforce Development Board can take steps to cultivate deeper data on its own. For instance, the LTPL list did not contain CIP codes assigned to each program. We recommend doing so, as it would allow the organization to quickly compare local vs state coverage of programs (and thus occupations through CIP-SOC mapping).
	Match Career Coaching with Labor Market Information (LMI).	Equip career coaches with LMI data to analyze market trends, identify emerging industries, and highlight job opportunities that align with veterans' skills and interests. Assist customers in identifying skills gaps through personalized assessments and provide tailored training or educational opportunities to bridge these gaps.
	Train staff and career advisors on Industry Clusters.	It appears that industry jargon and terminology is an impediment to the Board and staff being able to translate the cluster's needs into layman's terms, particularly for IT. Organize a "train-the-trainer" session for career coaches and staff alike, facilitated by an IT professional to enhance team readiness to support individuals in navigating the complexities of the job market effectively.

Introduction

In 2019, Lightcast completed the first State of the Workforce report on behalf of the Prince George's County Workforce Development Board. This study is a refresh of that original report, with important elements added to reflect the new reality of the labor market. Much has changed since the pre-pandemic days—artificial intelligence is now top of mind, behavioral health across the country has struggled, and remote and hybrid work features more heavily due to pandemic-related shifts in work context.

This study first examines the underlying demographic trends that prop up the area's labor force dynamics before examining the educational performance across various levels (K-12, CTE, post-secondary, and workforce system programming). It dives deep into the labor force dynamics of unemployment, underemployment, labor force participation, public health, and physical mobility before examining the state of each of Prince George's County's target industry clusters. Each of these clusters is supported by data and qualitative insights derived from business discussion groups.

Demographic Profile

Population[2]

Population is the bedrock of the labor force. The demographic dynamics of a population (e.g., growth, age, fertility, etc.) can influence important measures in the labor force such as size, pipeline, and labor force participation rate. The United States is facing demographic headwinds, much like the rest of the developed world. The US fertility rate is below the replacement rate of 2.1 births per female, the rate needed to maintain the current population size. With a fertility rate that continues to drop, the US population would be in decline if not for immigration. A low fertility rate also means fewer young people, altering the shape of the population pyramid and labor force.

Population Growth

Prince George's County has enjoyed robust population growth, especially when compared to Maryland and the United States (Table 1 and Figure 1). With a population of 964,073 in 2023 and an accelerating growth rate, the county is expected to surpass one million people by 2028. The United States and Maryland are growing as well, but at much slower paces.

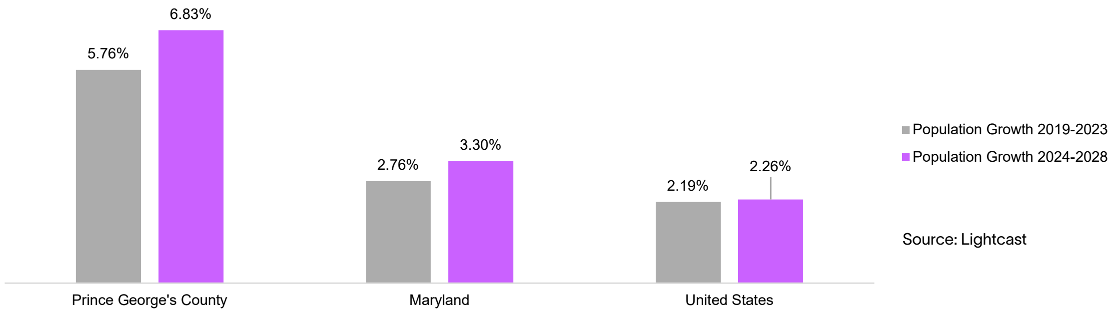
Some areas within the county have grown more rapidly than the county's 5.76% rate. Brentwood has grown by 14%, followed by Upper Marlboro at 13%. Conversely, Cheltenham and Laurel have experienced modest declines in size, at -4% and -1%, respectively.

Table 1 – Comparative Population Growth and Annual Growth Rates by Region

	Population		Compounded Annual Growth Rate (CAGR)	
Region	**2023**	**2028**	**2019-2023**	**2024-2028**
Prince George's County	964,073	1,047,804	1.41%	1.67%
Maryland	6,221,772	6,480,376	0.68%	0.82%
United States	335,528,243	345,041,909	0.54%	0.56%

Source: Lightcast

Figure 1 – Past & Projected Population Growth Rates by Region



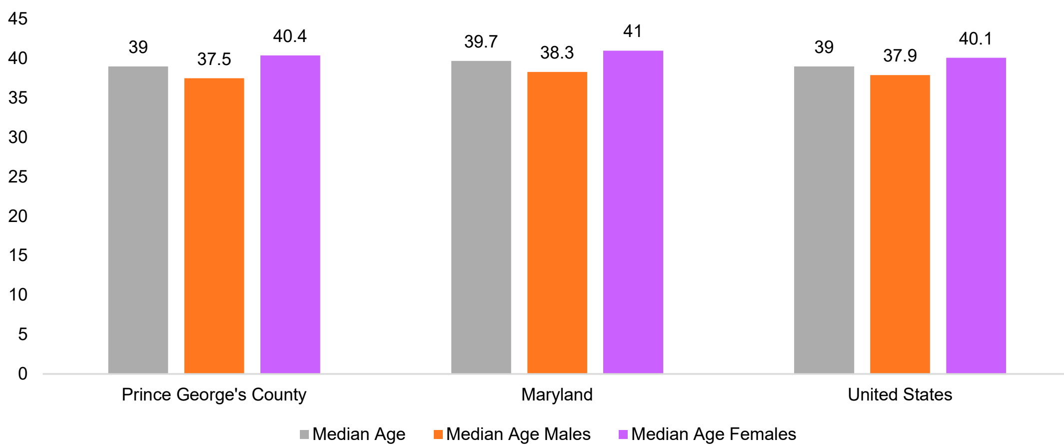
Source: Lightcast

2 Note: top line numbers such as population size, employment, etc. reflect latest available figures for 2023. However, the latest available figures for detailed demographic data (such as age, race/ethnicity breakdowns) are available for 2022 as these come from a different source (American Community Survey/ACS).

Age Dynamics

With such strong population growth, it may be tempting to assume that the outlook for the Prince George's County labor force is entirely positive. However, it is crucial to analyze the age dynamics of a population to identify underlying trends. Prince George's County has a median age of 39, which is identical to the national median but lower than Maryland's median age of 39.7 (Figure 2). The median age of men is lower than that of women because male life expectancy tends to be shorter.

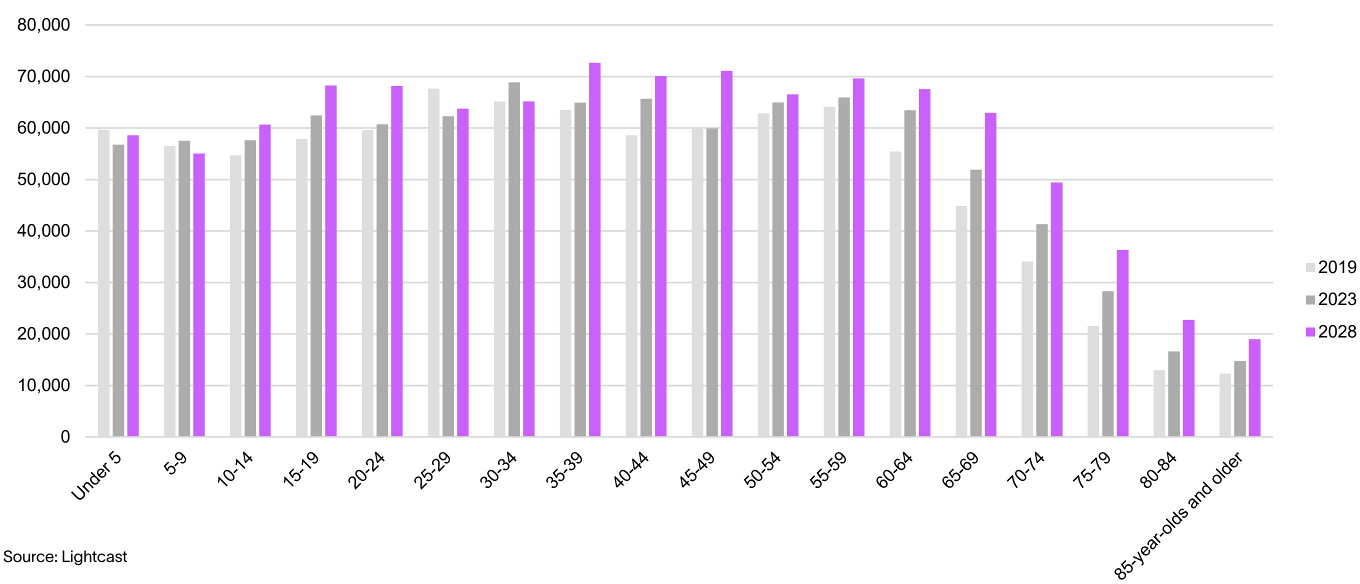
Figure 2 - Median Age Comparison by Geography and Sex



Source: ACS 5-Year

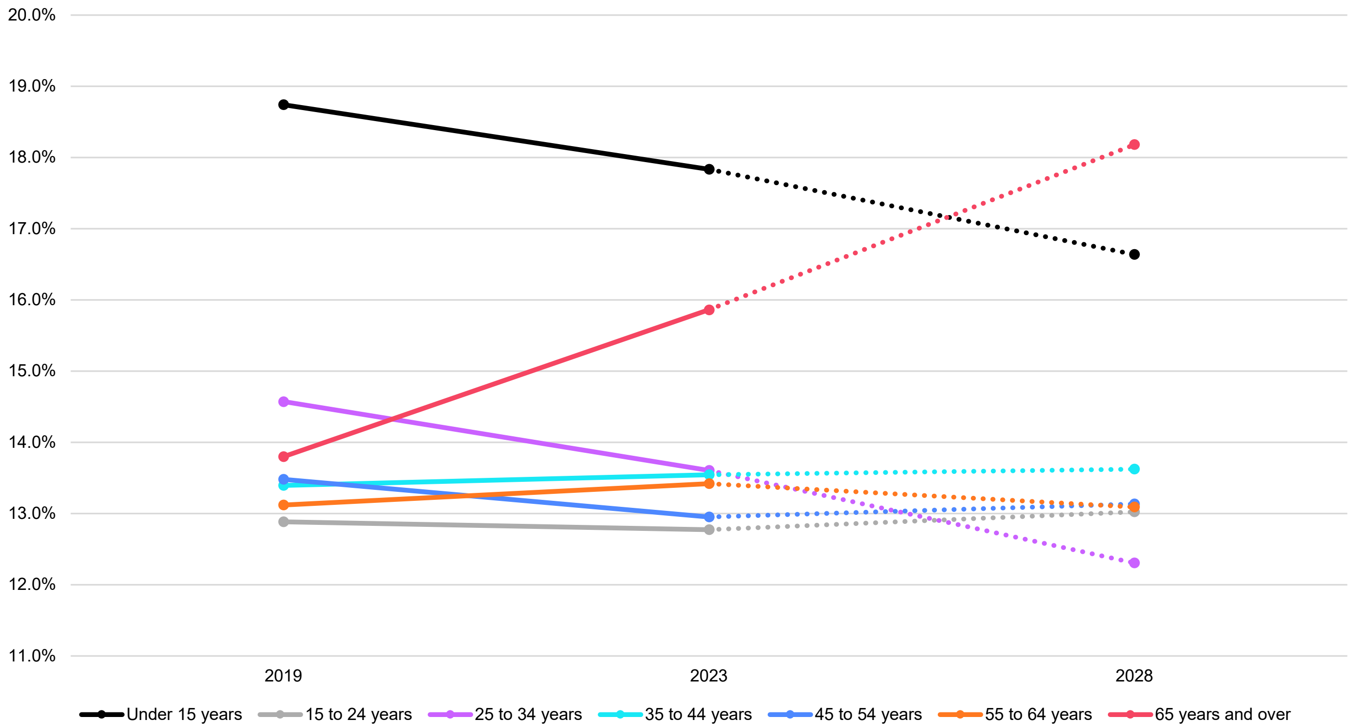
Although Prince George County's population is growing, the projected growth for retirement age individuals outpaces other age cohorts while the populations of children (Under 5 and 5-9) are projected to decline (Figure 3). This demographic shift means that the proportion of young people relative to the total population is shrinking, while the proportion of older people is increasing rapidly, as clearly demonstrated by Figure 4. These trends can have significant implications for the labor force, including shrinking entry-level talent pipelines and lower labor force participation rates (LFPR).

Figure 3 - Population Size by Age Cohort, Prince George's County



Source: Lightcast

Figure 4 – Age Cohort Population Share, Prince George's County



Source: Lightcast

Diversity

Prince George's County is an incredibly diverse area, with almost 90% of its population identifying as a racial or ethnic minority. The Black population is the largest group, accounting for roughly 61% of the total population. However, the racial and ethnic makeup of the county is changing. The White, Non-Hispanic population is rapidly declining in terms of share, while the Black and Asian Non-Hispanic populations are also projected to comprise a smaller proportion of the population. Meanwhile, the Hispanic population (All Races) is rapidly gaining in population share, projected to account for almost 24% of the population by 2028 (Table 2).

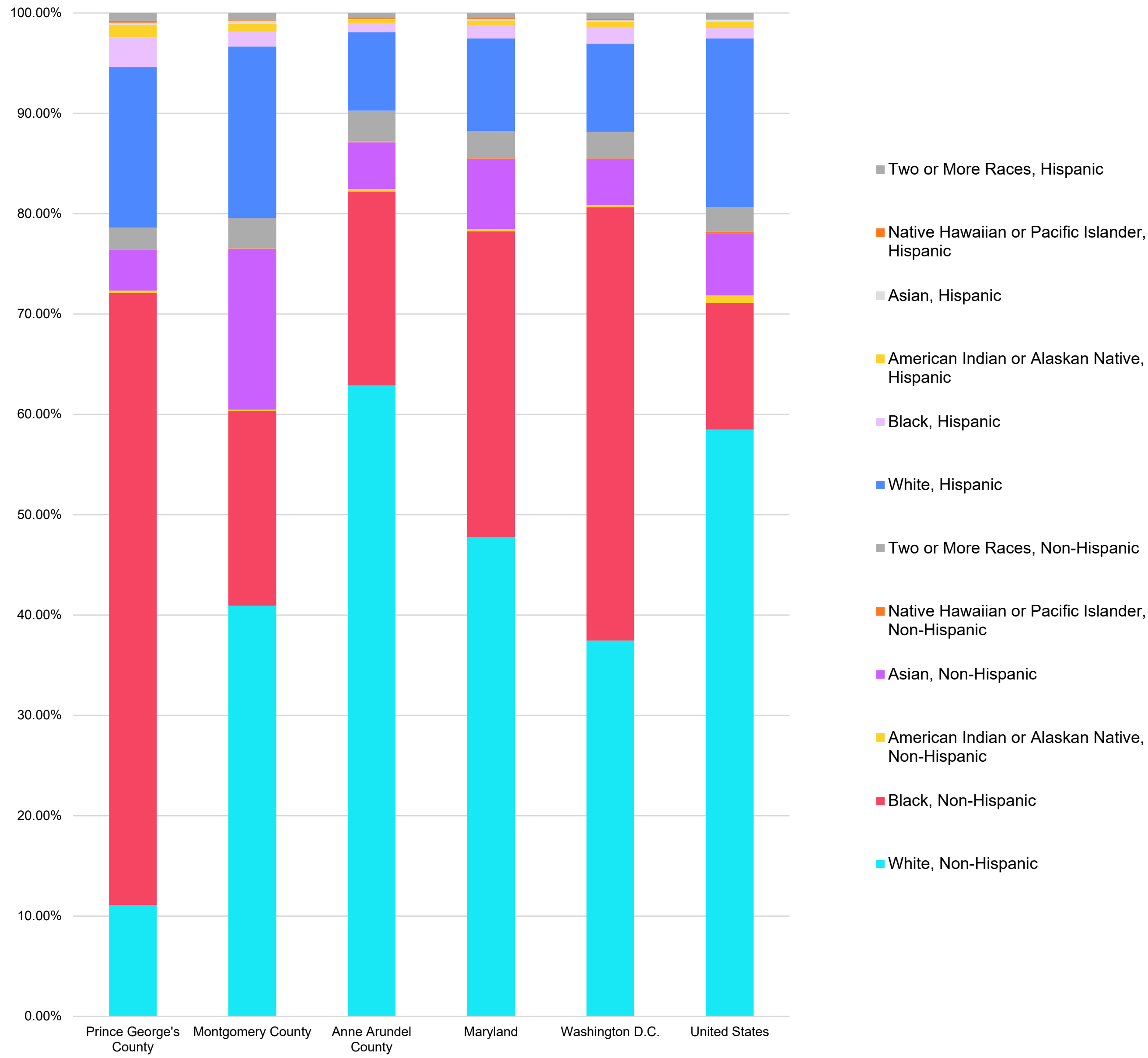
Table 2 – Racial Make-up of Prince George's County Population

Race/Ethnicity	2019	2023	2028
White, Non-Hispanic	12.24%	11.12%	9.85%
Black, Non-Hispanic	61.89%	60.99%	59.68%
American Indian or Alaskan Native, Non-Hispanic	0.25%	0.23%	0.22%
Asian, Non-Hispanic	4.23%	4.09%	3.95%
Native Hawaiian or Pacific Islander, Non-Hispanic	0.04%	0.04%	0.04%
Two or More Races, Non-Hispanic	2.02%	2.13%	2.31%
Hispanic, All Races	19.34%	21.40%	23.94%

Source: Lightcast

As Figure 5 demonstrates, Prince George's County stands out in the region with unique racial and ethnic diversity. Its Black population is even larger than the District of Columbia. It also has a uniquely large (by comparison) Black, Hispanic population (2.94%) which is almost three times the US average. Its White, Hispanic population is comparable to that of the United States.

Figure 5 – Demographic Composition of Prince George's County and Surrounding Areas, 2023

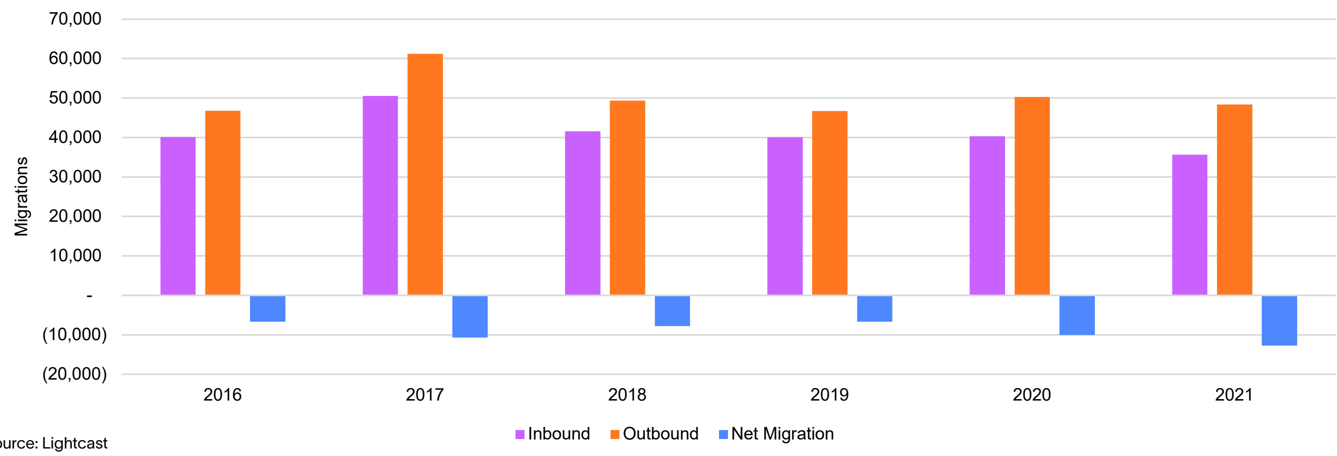


Source: Lightcast

Migration & Foreign Born

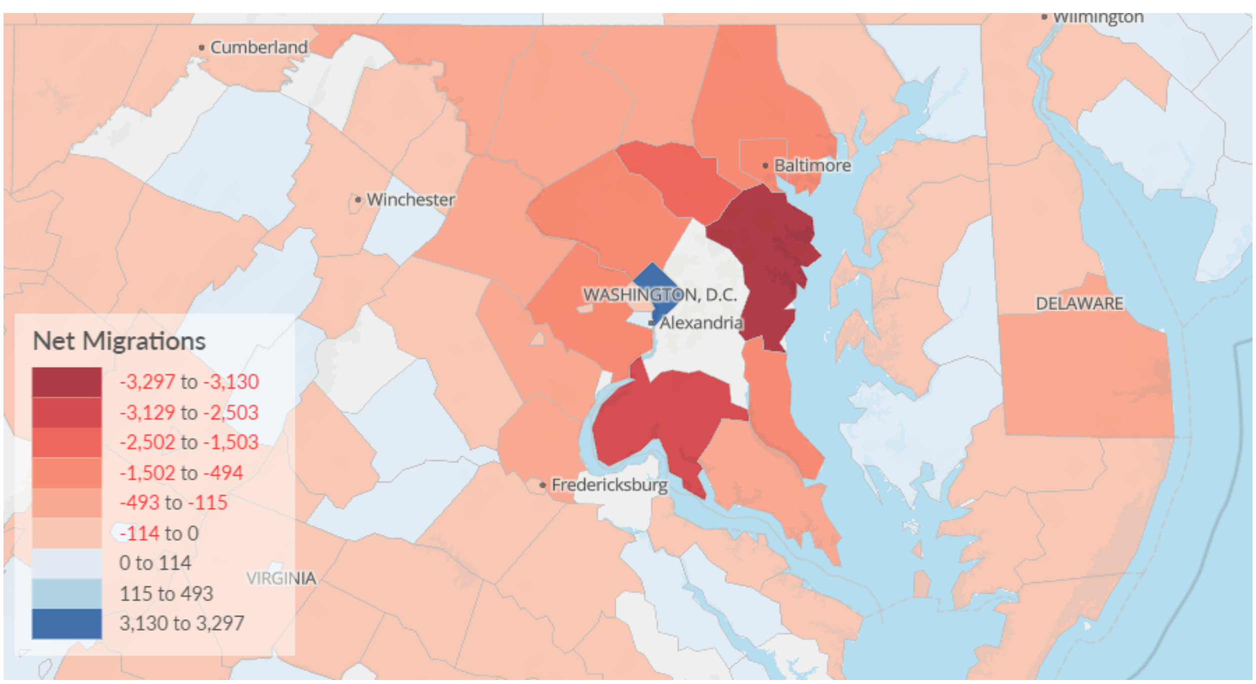
Despite Prince George's County's strong population growth, it experiences net negative migration patterns. Negative migration increased for three consecutive years between 2019 and 2021, culminating in a net loss of 12,704 people in 2021 (Figure 6). Most of the net migration loss is to surrounding areas such as Anne Arundel County, Charles County, and Howard County, meaning there may still be some potential for these workers to participate in the Prince George's County labor market. Prince George's County gains people through migration from Washington, D.C. (Figure 7 - map). Additionally, the county attracts talent from the New York City area, particularly from Kings, Queens, and Bronx counties.

Figure 6 - Prince George's County Migration Trends, 2016 - 2021



Source: Lightcast

Figure 7 - Map of Net Migration between Prince George's County & Surrounding Areas, 2021



Source: Lightcast

The county has a foreign-born population of 230,656 as of 2022, over half of which originates from the Americas. Compared to its surrounding areas, Prince George's County has a larger share of immigrants from the Americas and Africa, while neighboring counties have larger shares from Europe and Asia (Table 3). With the Americas being the largest place of birth for the foreign-born population in the county, it is not surprising that Spanish is the most spoken language apart from English (Table 4). Almost 18% of the population speaks Spanish.

Table 3 – Place of Birth (Foreign Born Population), Prince George's County and Surrounding Areas

	Europe	**Asia**	**Africa**	**Americas**	**Oceania**	**Total**
Prince George's County	5,904	30,451	61,172	132,882	247	230,656
Anne Arundel County	6,953	18,556	8,044	20,136	232	53,921
Montgomery County	30,730	126,157	59,027	128,281	956	345,151
Northern Virginia	43,792	279,000	65,042	163,608	1,743	553,185
Washington, D.C.	14,780	19,290	15,742	39,489	795	90,096

Source: ACS 5-Year

Table 4 - Languages Spoken, Prince George's County and Surrounding Areas

	Speak only English	**Spanish**	**Other Indo-European languages**	**Asian and Pacific Island languages**	**Other languages**	**Total**
Prince George's County	637,753	158,819	34,215	23,178	42,899	896,864
Anne Arundel County	483,388	32,377	15,777	13,767	7,517	552,826
Montgomery County	577,856	170,829	104,733	91,315	49,878	994,611
Northern Virginia	1,196,230	233,287	157,858	183,168	82,736	1,853,279
Washington, D.C.	518,687	57,647	25,626	13,217	13,888	629,065

Source: ACS 5-Year

Income & Poverty

The median household income in Prince George's County has increased from $78,607 in 2017 to $97,935 in 2022. However, when adjusted for inflation, the 2017 figure is closer to $94,637 meaning just a modest increase in real wages occurred. Another measure is per capita income, which is derived by "dividing the total income of a particular group by the total population in that group (excluding patients or inmates in institutional quarters)."[3] It is measured in money income, which includes wages, salaries, and income benefits such as social security or unemployment benefits.

Prince George's County reversed its decline in real per capita income – growing 5.9% between 2017 and 2022.

On a per capita basis, income has grown from $34,391 in 2017 to $43,833 in 2022. While this may seem like rapid growth, when adjusting for inflation, the 2017 per capita income is $41,404 expressed in 2022 dollars, indicating a growth of 5.9%. This is welcome news as the previous State of the Workforce report demonstrated negative growth in per capita income.

When compared to neighboring areas, the county's per capita income is noticeably lower than Anne Arundel and Montgomery counties (as well as Maryland), although its income growth exceeds that of Montgomery County. The per capita income growth is on par with Maryland but lags the United States (Table 5).

Table 5 - Per Capita Income & Growth, Adjusted in 2022 Dollars

	2017	**2022**	**Percent Change**
Prince George's County	$ 41,404	$ 43,833	5.9%
Anne Arundel County	$ 52,079	$56,187	7.9%
Montgomery County	$61,595	$64,126	4.1%
Washington, D.C.	$61,198	$71,297	16.5%
Maryland	$47,037	$49,865	6.0%
United States	$37,535	$41,261	9.9%

Source: ACS 5-Year

Another measure of wealth and income is the Gini Index of Income Inequality, which ranks income inequality based on income distribution on a scale from 0 to 1, with values closer to 1 indicating higher inequality. Prince George's County has less income inequality than Maryland and the nation, as demonstrated by Table 6. Unfortunately, income inequality is trending upward in the county, having risen from a Gini Index of 0.3988 in 2018.

Table 6 - Gini Index of Income Inequality

	Gini Index 2022
Prince George's County	0.4076
Maryland	0.4559
United States	0.4829

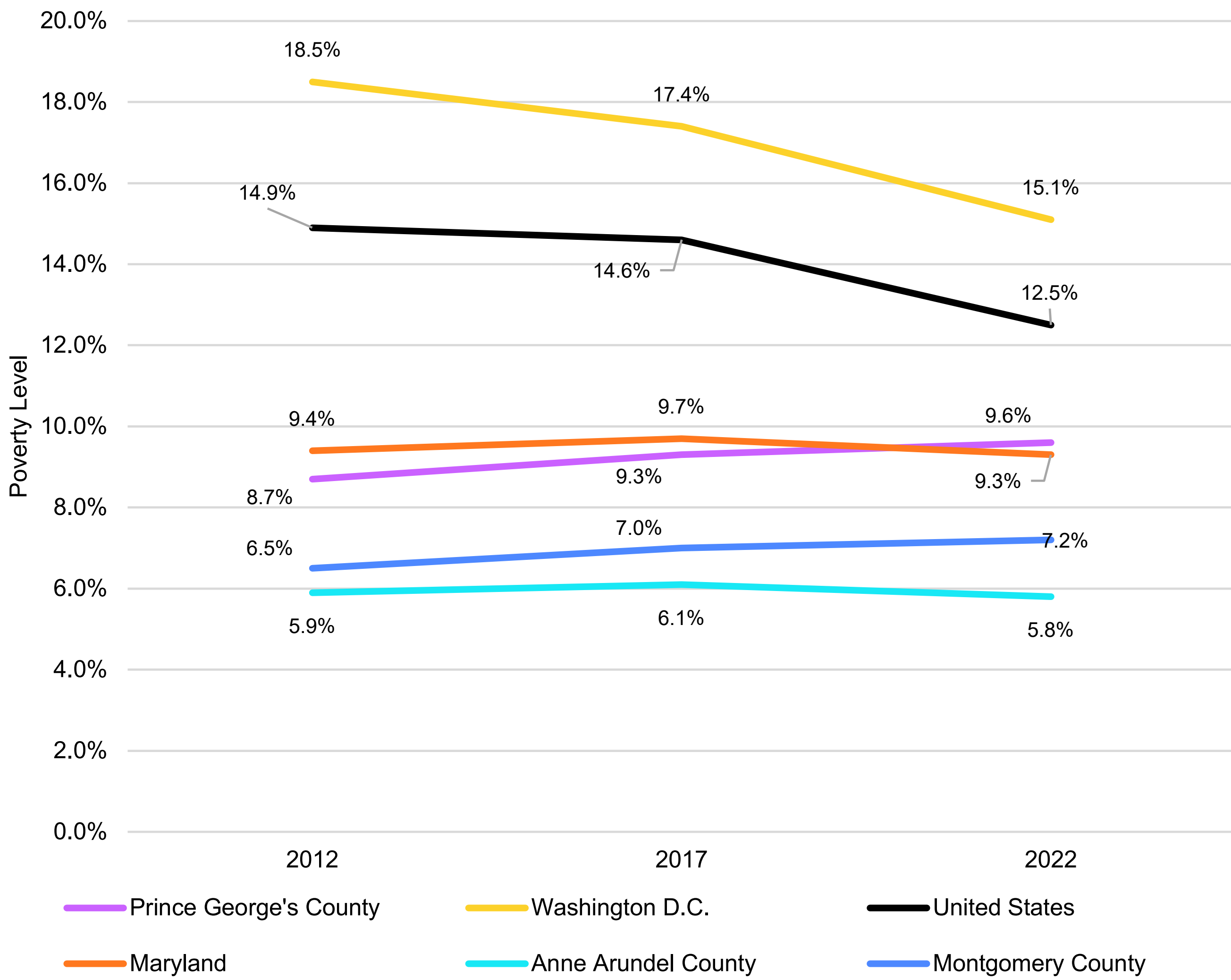
Source: ACS 5-Year

3 US Census Bureau, https://www.census.gov/programs-surveys/cps/technical-documentation/subject-definitions.html#percapitaincome

Poverty rate is a key measure of the economic health of a region.[4] Beyond the obvious hardships that individuals endure in poverty, it is linked to higher crime rates and poorer health outcomes. Poverty creates economic inefficiency by limiting human capital development, affecting education outcomes, and imposing barriers to full employment. Additionally, it burdens government resources, necessitating increased spending on welfare programs, criminal justice, health care, and other services.

While the poverty level in the United States has been declining, it has been rising in Prince George's County over the last decade, increasing from 8.7% in 2012 to 9.6% in 2022 (Figure 8). The county's poverty level has generally been comparable to that of Maryland but exceeds the levels in Montgomery and Anne Arundel counties. It has remained well below the poverty levels of Washington, D.C. and the United States.

Figure 8 – Comparison of Poverty Level Trends by Region



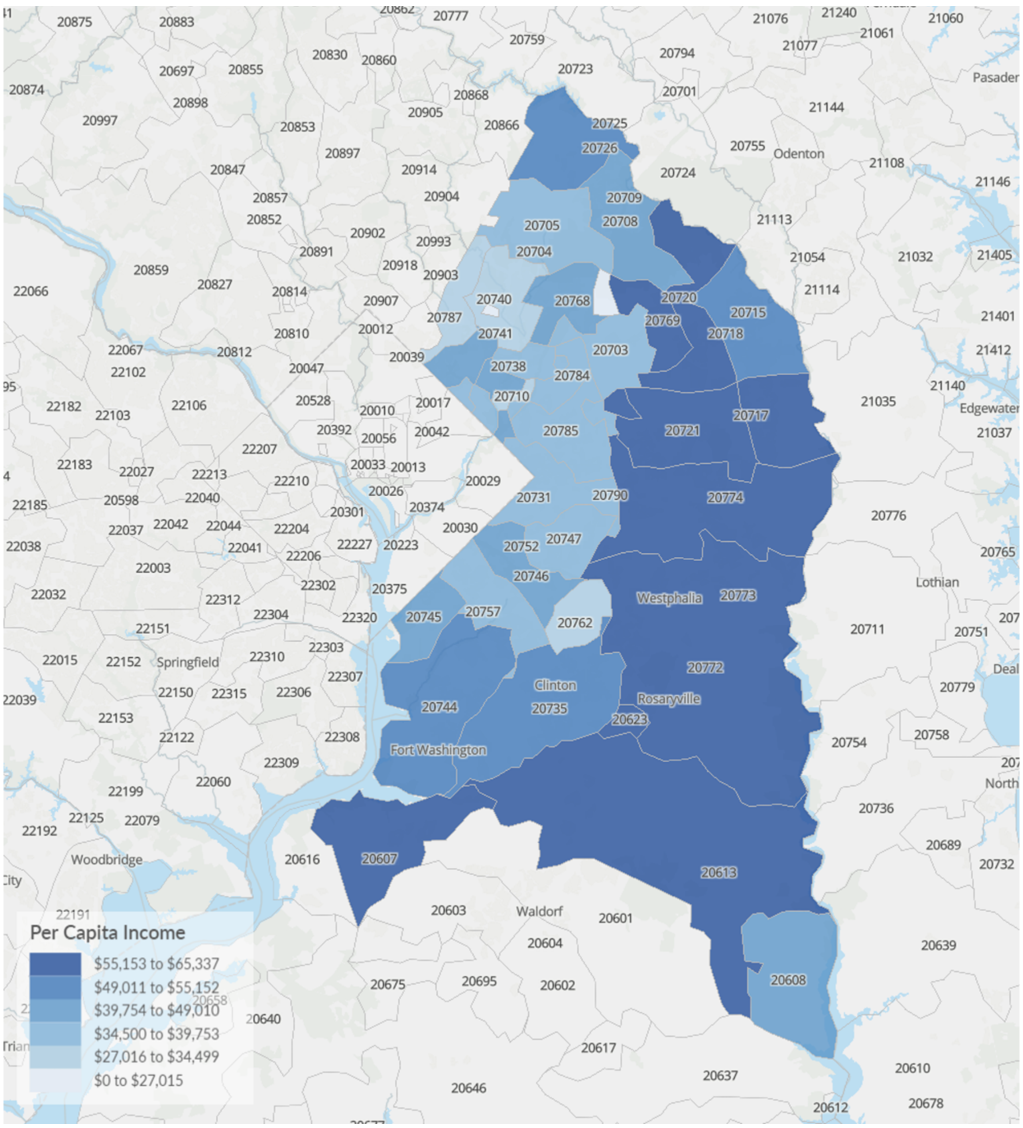
Source: ACS 5-Year

4 Another measure of financial insecurity apart from the federal poverty guidelines is ALICE (Asset-Limited, Income Constrained, Employed) by United Way.

Low income and poverty is experienced differently across various parts and groups within the county. Hyattsville and College Park are most acutely affected, with roughly one-fourth of their populations experiencing poverty, while poverty begins to subside further from the District of Columbia as per capita income levels rise (Figure 9). A smaller percentage (7.9%) of seniors aged 65 and over experience poverty, whereas children under 18 experience a higher poverty rate than the county average, at 12.7%. Childhood poverty is particularly concerning as it can affect development and education outcomes, making the poverty cycle more difficult to break. Nevertheless, the childhood poverty rate in the county is significantly below the national rate of 17.0%.

Women experience poverty at a slightly higher rate than men (10.6% compared to 8.5%). Black and White demographic groups face poverty at similar rates, 8.2% and 8.7%, respectively. However, Hispanics and Asians experience elevated poverty levels, with roughly 13% of each population group below the poverty threshold.[5]

Figure 9 - Map of Per Capita Income Levels within Prince George's County by ZIP Code



Source: Lightcast

5 ACS 5-Year

Educational Profile

Attainment

Education serves as an important vehicle for talent development. The education system provides the labor market with the broad spectrum of skills and qualifications needed to serve employers. It also opens the door to better-paying opportunities for individuals who progress further in their educational careers. Furthermore, higher educational attainment is associated with higher labor force participation.

Prince George's County has made progress towards higher educational attainment in the last five years. The share of the population aged 25 and over with a degree has increased from 38.9% to 42.3%, as demonstrated in Table 7. If this trend continues, the county can expect to have 43.7% of its population with some type of postsecondary degree by 2028. The county also has an above average share of people with some college education (but no degree), indicating that there is skilled labor from career & technical education (CTE) or the trades.

Table 7- Comparative Educational Attainment Trends of Population Age 25 and Over by Region

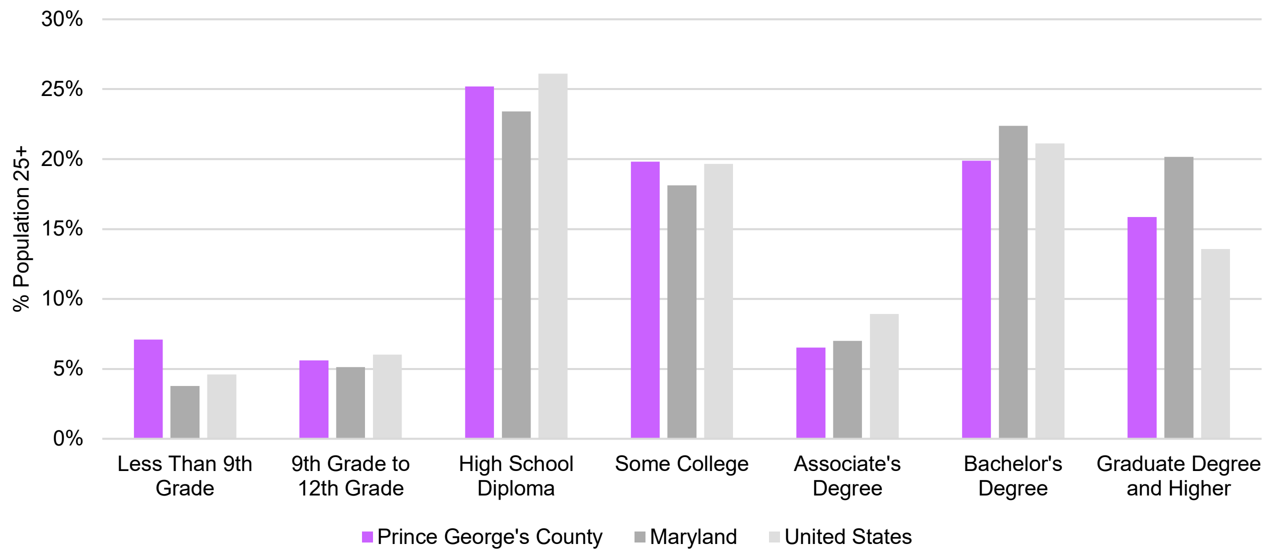
	2019			**2023**			**2028 (Projected)**		
Education Attainment	**Prince George's County**	**Maryland**	**United States**	**Prince George's County**	**Maryland**	**United States**	**Prince George's County**	**Maryland**	**United States**
Less Than 9th Grade	7.1%	4.1%	5.2%	7.1%	3.8%	4.6%	7.3%	3.7%	4.3%
9th Grade to 12th Grade	6.6%	5.9%	7.0%	5.6%	5.1%	6.0%	5.3%	4.7%	5.5%
High School Diploma	25.9%	24.6%	26.9%	25.2%	23.4%	26.1%	24.9%	22.7%	25.6%
Some College	21.5%	18.7%	20.4%	19.8%	18.1%	19.7%	18.9%	17.7%	19.2%
Associate's Degree	6.2%	6.7%	8.5%	6.5%	7.0%	8.9%	6.7%	7.2%	9.2%
Bachelor's Degree	18.5%	21.4%	19.7%	19.9%	22.4%	21.1%	20.3%	23.0%	21.9%
Graduate Degree and Higher	14.2%	18.5%	12.3%	15.9%	20.2%	13.6%	16.7%	21.1%	14.3%

Source: Lightcast

However, the county does lag the United States and Maryland in terms of educational attainment. It has a significantly higher proportion of the population with less than a high school diploma or its equivalent (7.1%) compared to Maryland (3.8%) and the United States (4.6%), as shown by Figure 10. Much of this lower educational attainment is driven by the Hispanic population. Although the Hispanic population is roughly double the size of the White population, 44.3% of Hispanics have less than a high school education, compared to just 4.2% of the White population (Figure 11). The Black population, the largest demographic group in the county, also has lower degree attainment compared to the White population. Approximately 5.8% of the county's Black population has less than a high school education, which is still higher than the national average.

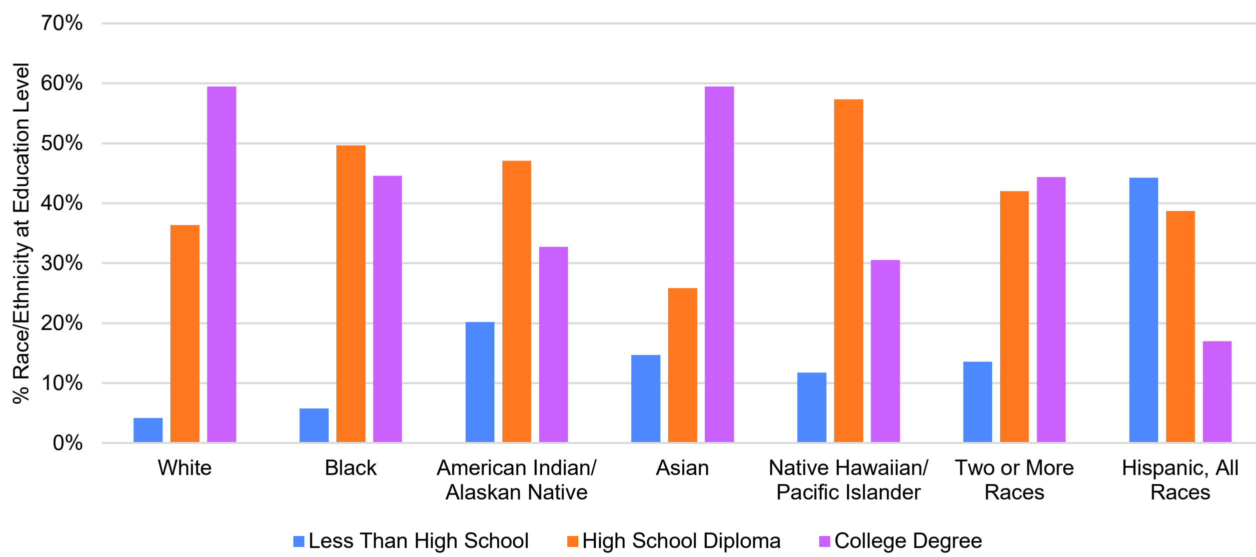
When comparing educational attainment between genders, women achieve degrees at a higher rate than men (46.3% compared to 37.8%), though both genders are showing improvement.

Figure 10 - Educational Attainment of Population Age 25 and Over by Region, 2023



Source: Lightcast

Figure 11 - Educational Attainment by Race/Ethnicity of Population Age 25 and Over, 2023



Source: Lightcast

K-12

The K-12 education system is crucial to workforce development for several reasons. It provides students with the foundational skills necessary for any job, including literacy, critical thinking, and basic math, while also developing soft skills through socialization. Additionally, the system prepares students for higher education and can address specific workforce needs by focusing on areas such as STEM (Science, Technology, Engineering, and Mathematics) or Career & Technical Education (CTE).

Enrollment

There were 131,143 public school students enrolled in the 2023 academic year. Enrollment has declined since 2019, which aligns with the trend of a decreasing young population, both in terms of total numbers and share of the population. There were approximately 1,500 fewer students (-1.15%) enrolled in 2023 compared to 2019 (Table 8). This rate of decline is faster than that of Maryland, which also experienced a drop in student enrollment during the same period.

In addition to public school students, there are 11,326 private school students. The student-teacher ratio for private schools (10.7) is more advantageous compared to public schools (14.5).

Public School Summary
- 131,143 students
- 17,880 employees
- 9,028 teachers
- 14.5 student-teacher ratio
- 209 schools & centers

28 high schools | **27** middle schools | **119** elementary schools | **13** charter schools | **27** academies, special centers, & dedicated specialty schools

Private School Summary
- 11,326 students
- 1,056 teachers
- 10.7 student-teacher ratio
- 55 schools
- $10,767 average annual elementary school tuition
- $14,372 average annual high school tuition

Table 8 - Student Enrollment Trends, Prince George's County Public Schools

	Student Enrollment	Total Change	Total % Change	CAGR	
Region	**2019**	**2023**	**2019-2023**	**2019-2023**	**2019-2023**
Prince George's County	132,667	131,143	(1,524)	-1.15%	-0.29%
Maryland	896,837	889,971	(6,866)	-0.77%	-0.19%

Source: Maryland State Department of Education (MSDE)

Diversity

The county's diversity is reflected in its student population, though with some nuances. For instance, while Hispanics account for over 21% of the county population, they represent almost 40% of the student population, as shown in Table 9. Conversely, the White population, which makes up 11.4% of the total population, constitutes just 3.8% of the student population. Similarly, the Black population is underrepresented in the student demographic. This discrepancy highlights the unique age demographics of Hispanics, who are significantly younger than other groups and thus account for an outsized portion of the student population.

Table 9 - Student Diversity, Prince George's County Public Schools, 2023

	Student Population	Share of Total
Black/African American	68,502	52.2%
Hispanic/Latino, Any Race	51,561	39.3%
White	5,009	3.8%
Asian	3,577	2.7%
American Indian/Alaskan Native	491	0.4%
Native Hawaiian/Pacific Islander	257	0.2%
Two or More Races	1,746	1.3%

Source: MSDE

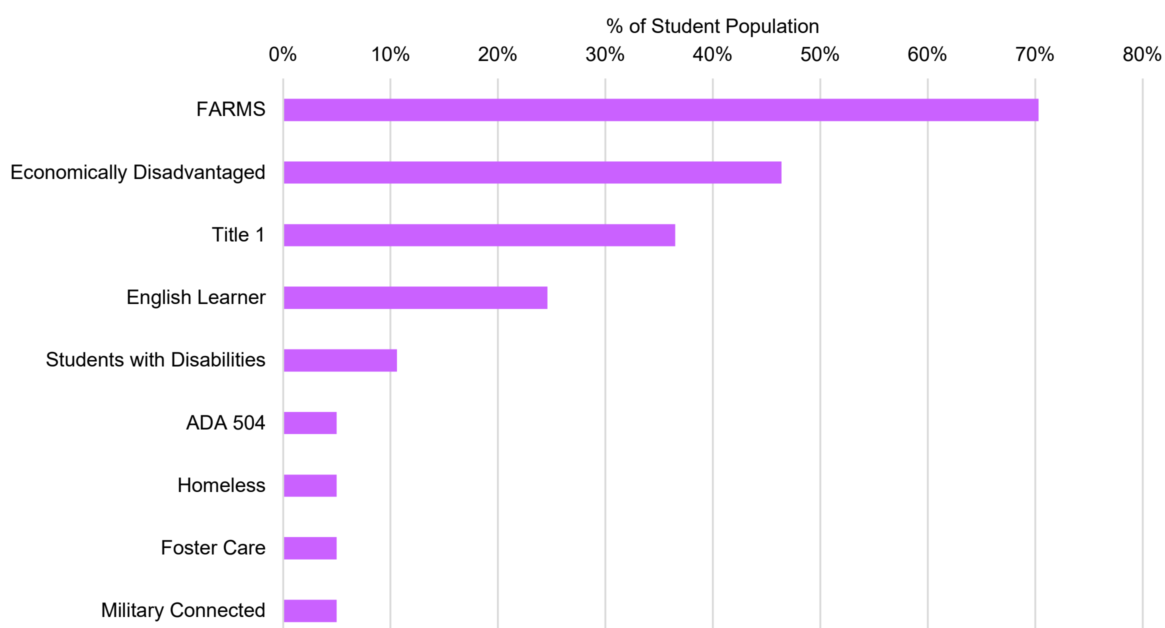
Student Groups

There are several groups of students with specific needs for resources. For instance, several federal programs support children's nutritional needs, and the eligibility rate can indicate the level of child poverty in a region. Children are eligible for Free And Reduced Meals (FARMs) if their household "benefits from the Food Supplement Program (FSP), or Temporary Cash Assistance (TCA)."[6]

Figure 12 below demonstrates that roughly 70% of students qualify for FARMs. This is concerning, as the eligibility rate for FARMs has increased rapidly from 63.5% in the 2018-2019 school year to the current rate of 70.3% (Table 10). This sharp increase occurred between 2022 and 2023. Furthermore, this rate significantly exceeds the Maryland average and is felt most acutely at the Pre-K/ Kindergarten level, a critical period for childhood development.

The share of English learners grew from 20.7% to 24.6% between 2019 and 2023.

Figure 12 - Prince George's County Student Group Populations, Percent of Total Student Population, 2023



Source: MSDE

6 https://www.hcpss.org/food-services/frequently-asked-questions/msde-farms-faq/

Table 10 - Student Population Eligibility for FARMS, 2023

	School Year	
	2018-2019	**2022-2023**
Prince George's County Public School District	63.5%	70.3%
Maryland (All Public Schools)	42.3%	51.3%
	Number	**Percent**
Pre-K/Kindergarten	10,415	73.8%
Elementary	35,088	73.3%
Middle	20,973	71.0%
High	25,718	64.9%
ALL	92,194	70.3%

Source: MSDE

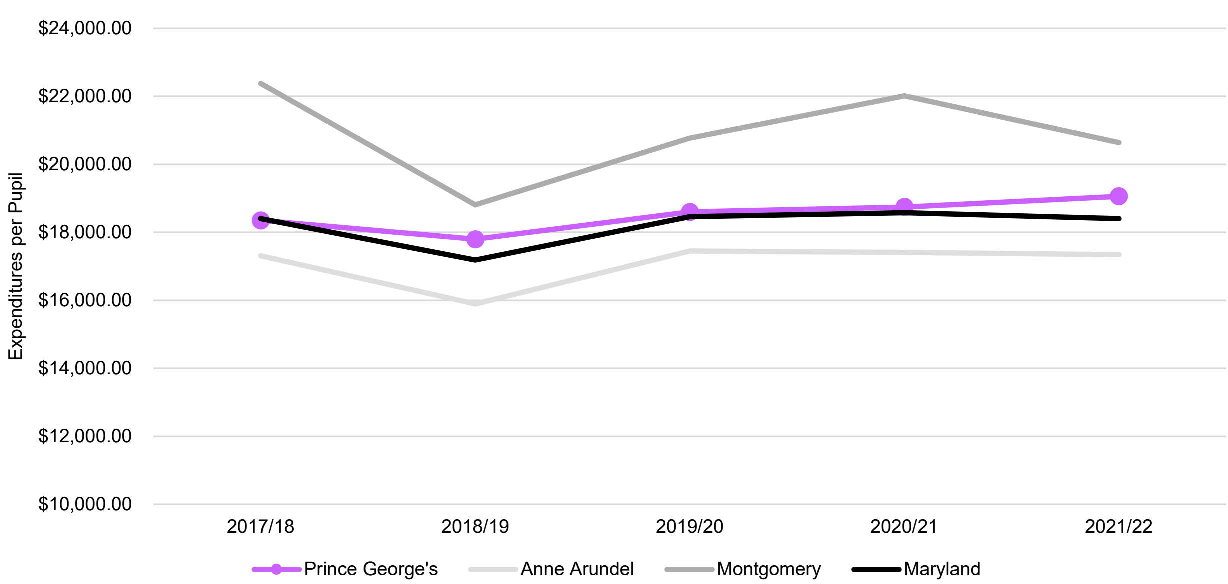
Investments in Education

Two key metrics portray a region's investment in public education: per pupil expenditures and student-teacher ratios. Because school systems rely on property taxes for their budgets, the level of expenditures per pupil can vary by region and year. An increase in property values can enhance the spending power of a school district, though each region sets the tax rate at which this is collected.

Prince George's County spends roughly the same amount per pupil as the Maryland state average ($19,061 compared to $18,400). In comparison, Montgomery County's expenditures are noticeably higher, while Anne Arundel County's expenditures are slightly lower. The expenditure rate for Prince George's County has steadily increased by roughly $600 per pupil since 2018, while the state expenditure has remained steady (Figure 13).

It should be noted that expenditure per pupil does not necessarily correspond to an increase in student performance, as we demonstrate later.

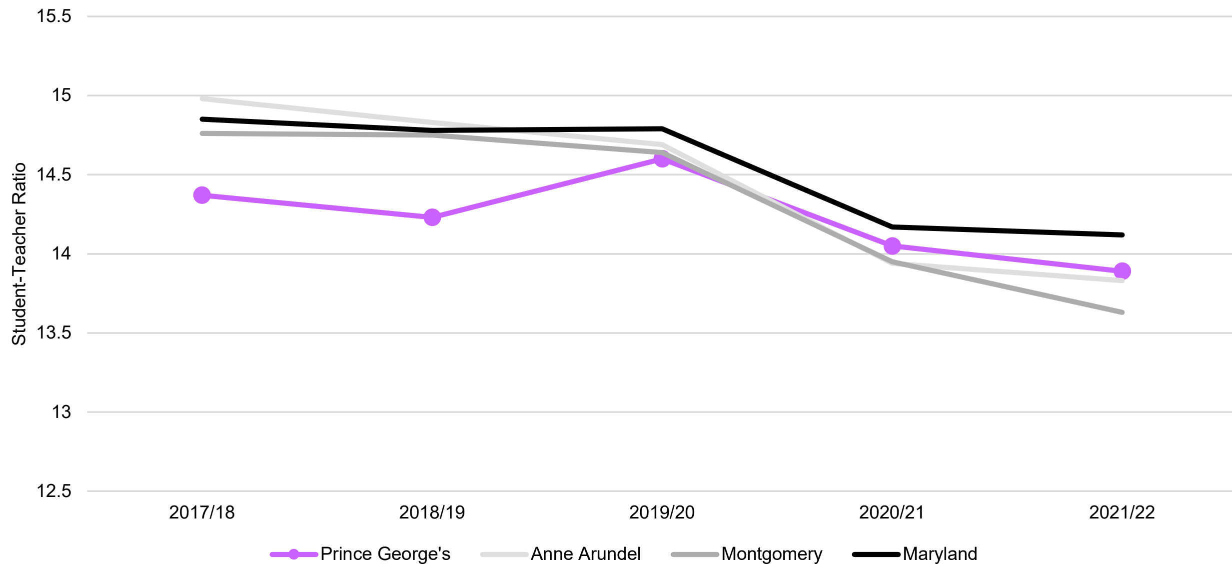
Figure 13 - Expenditures per Pupil by Region and Year (adjusted in 2022 dollars)



Source: MSDE

The ratio of students per teacher has declined statewide from 14.85 to 14.12 as shown by Figure 14. Prince George's County, Anne Arundel County, and Montgomery County follow this trend. At one point, Prince George's County had noticeably lower student-teacher ratios compared to its peers, but this advantage has since been negated.

Figure 14 - Student-Teacher Ratios by Region and Year



Source: NCES

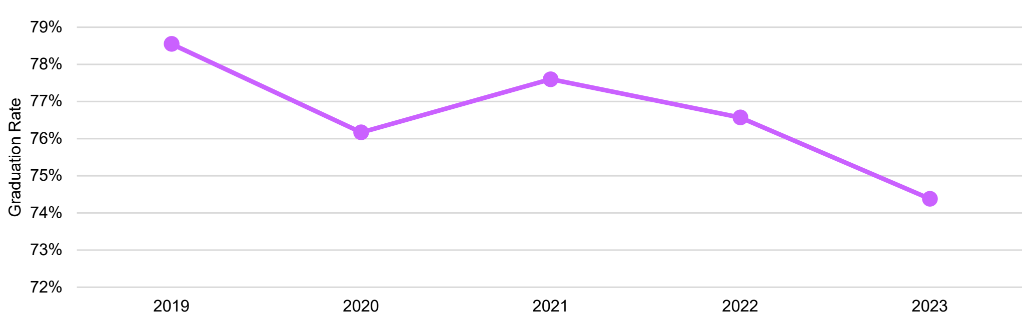
Academic Performance

Graduation, Dropouts, and Absenteeism

Obtaining a high school diploma is an important milestone. For individuals, it unlocks a path to higher education and more advanced skills, increasing employment opportunities and earning potential. For society, high school graduates tend to have lower rates of crime and public assistance dependency. Each level of educational attainment is also associated with higher labor force participation, thereby maximizing the labor pool. Consequently, high school graduation is critical in a labor-constrained environment.

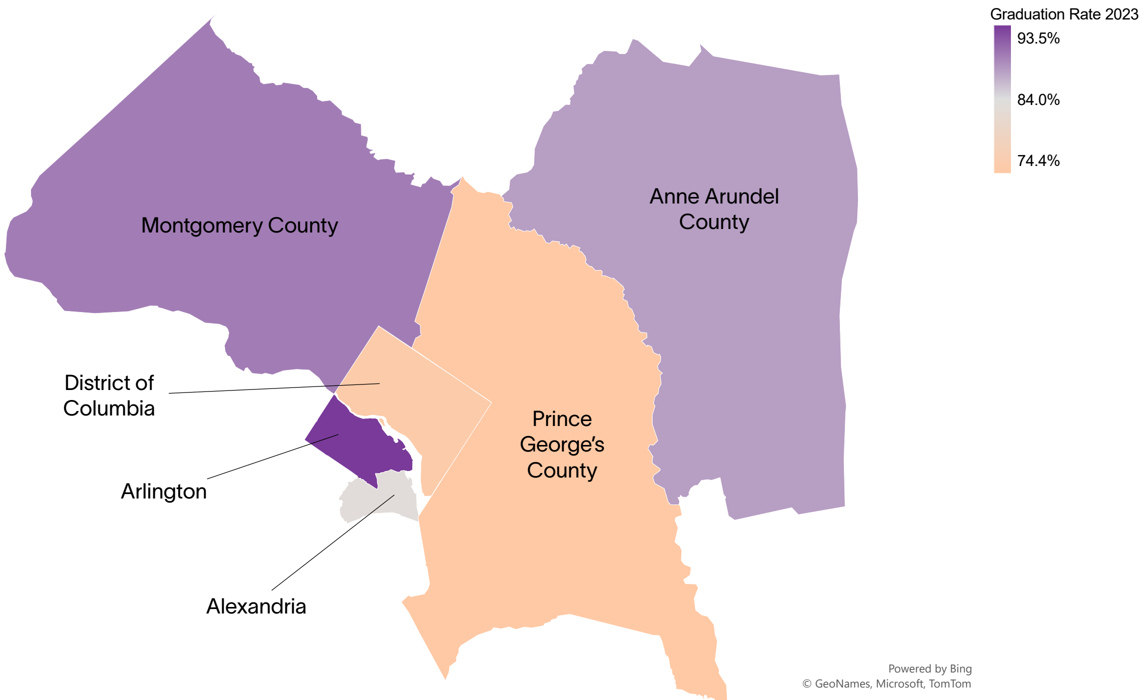
Unfortunately, much of the gains in the graduation rate that Prince George's County made have been lost over the last five years. The rate has fallen from 78.6% in 2019 to just 74.4% in 2023 (Figure 15). This rate is similar to Washington, D.C. (75.3%), but much lower than Maryland (85.8%) and neighboring Montgomery and Anne Arundel counties.

Figure 15 - High School Graduation Rates, Prince George's County Public Schools, 2019-2023



Source: MSDE

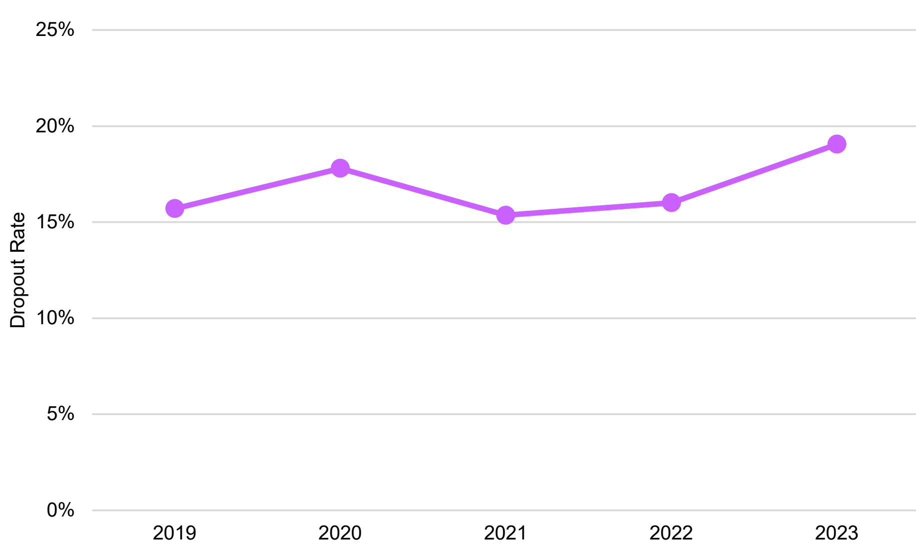
Figure 16 – Map of Surrounding Area Graduation Rates, 2023



Source: MSDE, D.C. Public Schools, Virginia Department of Education

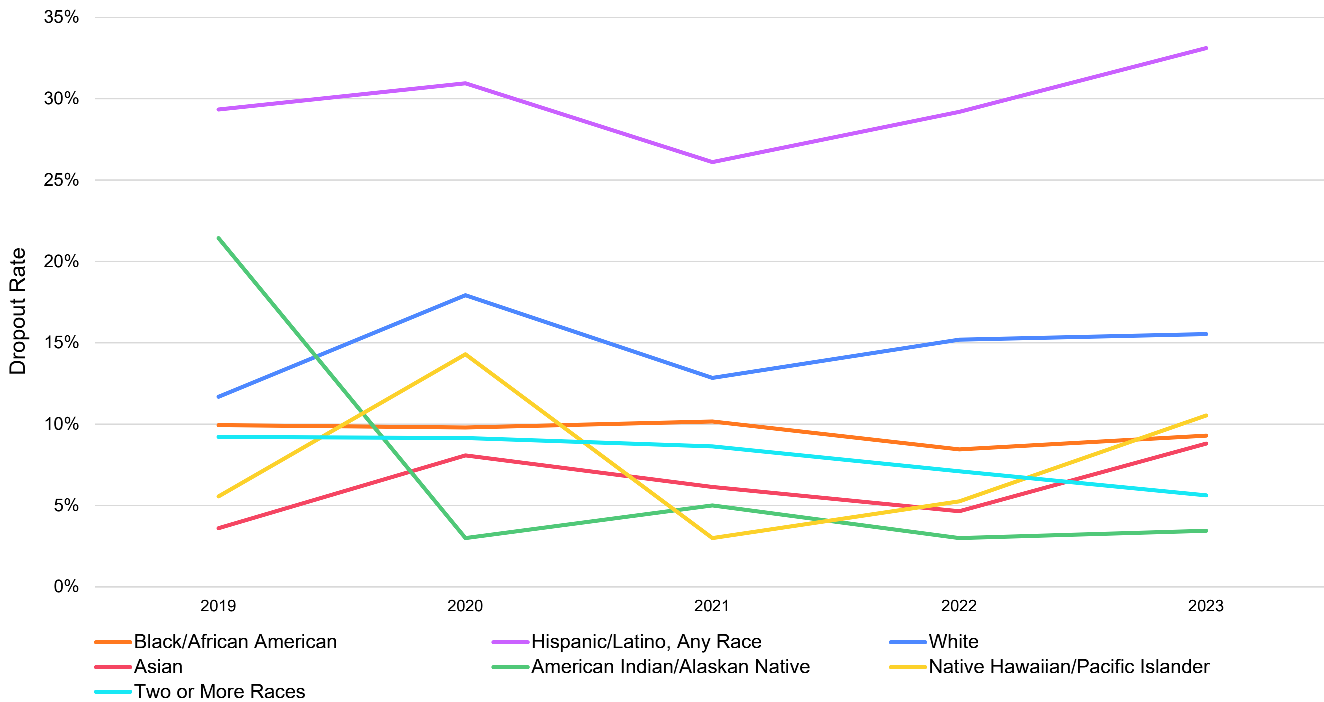
It should come as no surprise, then, that dropout rates have increased over the same period. Between 2019 and 2023, the dropout rate rose from 15.7% to 19.1% (Figure 17). Compared to Maryland and neighboring counties, Prince George's County's dropout rate is more than double, as shown in Figure 19. The Hispanic student population is a major contributor to this disparity, with a dropout rate of 33% (Figure 18). This could be attributable to language barriers faced by the immigrant population.

Figure 17 - High School Dropout Rates, Prince George's County Public Schools, 2019-2023



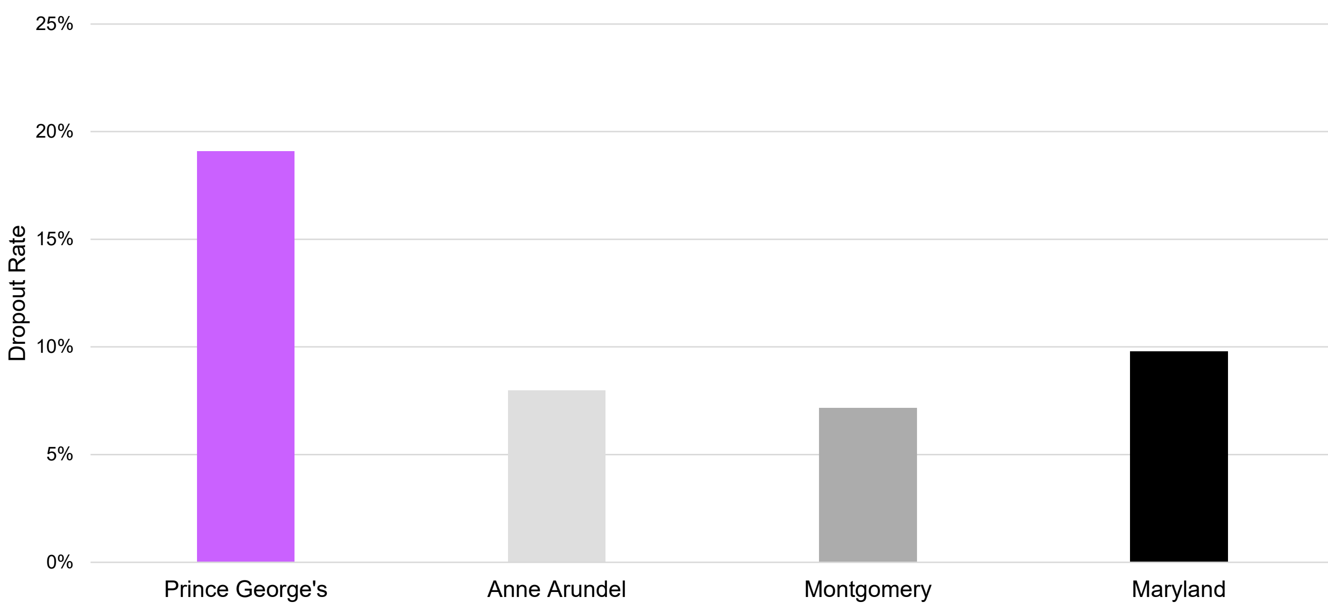
Source: MSDE

Figure 18 - Dropout Rates by Race/Ethnicity, Prince George's County, 2023



Source: MSDE

Figure 19 - High School Dropout Rates by Surrounding Area, 2023

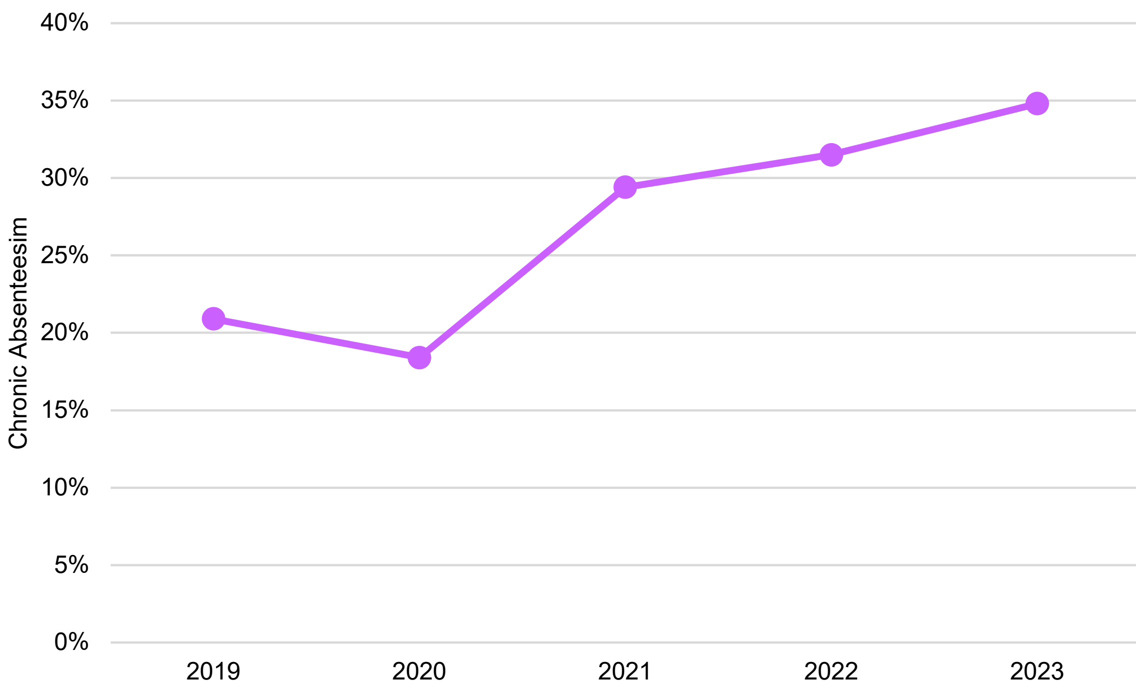


Source: MSDE

Another alarming trend is the sharp increase in chronic absenteeism[7], which has escalated from just over 20% in 2019 to approximately 35% in 2023, as depicted in Figure 20. This significant 15-point rise suggests a deterioration in the quality of education due to frequent absences. The lack of regular attendance hinders the reinforcement of learned skills, potentially impacting students' academic and social development. Moreover, inconsistent attendance can foreshadow difficulties in the labor market, as employers, like educational institutions, require reliable presence and adherence to responsibilities. Particularly concerning is that chronic absenteeism peaks above 44% among high school students, who are on the cusp of entering the workforce, where such patterns of non-attendance could have more direct negative consequences on their professional futures.

Rising chronic absenteeism is a trend the Workforce Board must address. It hinders hard and soft skill attainment, social development, and can foreshadow future difficulties in the labor market where employers require reliable workers.

Figure 20 - Chronic Absence Rate, Prince George's County, 2019-2023

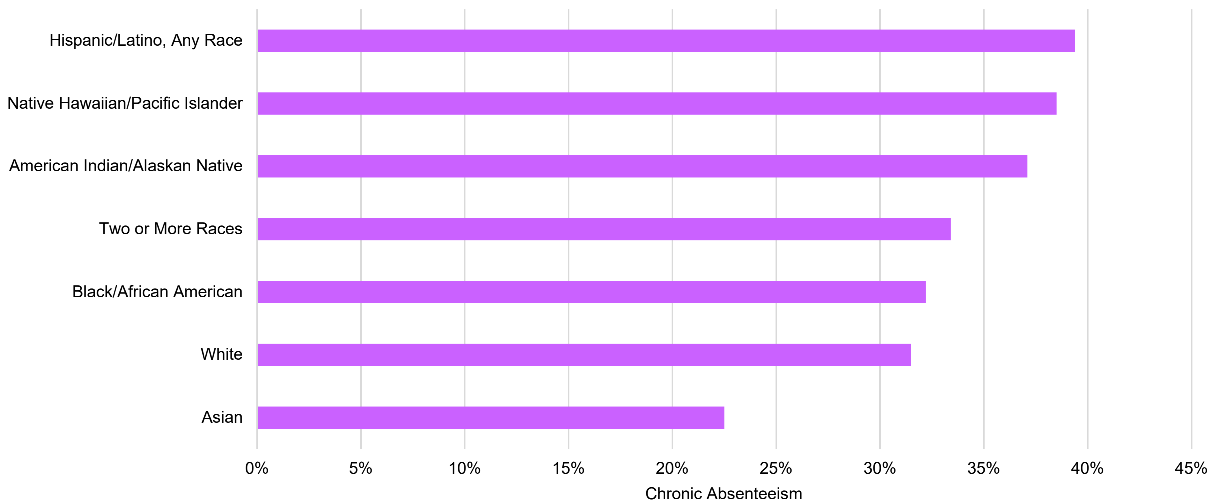


Source: MSDE

7 Chronic absenteeism is defined by the Maryland State Department of Education (MSDE) as "the number of students who are expected to attend school for at least 10 days and who were absent 10% or more of the school days while enrolled at that school. For example, a student who is registered to attend a school for 30 days and who is absent 3 of those 30 days is considered chronically absent.
A student can be counted as chronically absent in multiple schools within the state in the same year. This can occur when a student who is enrolled for in a school for at least 10 days and is chronically absent moves and enrolls in another school for at least 10 days and is chronically absent."

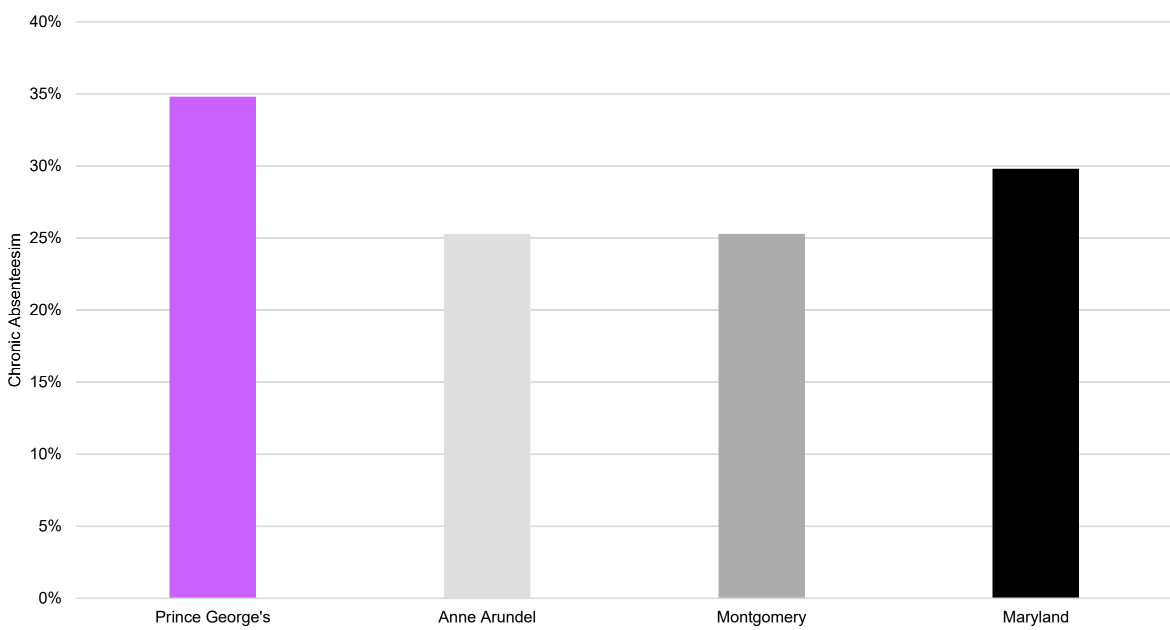
Chronic absenteeism is most prevalent among the Hispanic student population (Figure 21). When comparing the rate of absenteeism to surrounding areas, Prince George's County exceeds Maryland (29.8%) and both Montgomery and Anne Arundel counties (25.3%), as shown by Figure 22.

Figure 21 - Chronic Absence Rate by Race/Ethnicity, Prince George's County, 2023



Source: MSDE

Figure 22 - Chronic Absence Rate of Prince George's County and Surrounding Areas, 2023

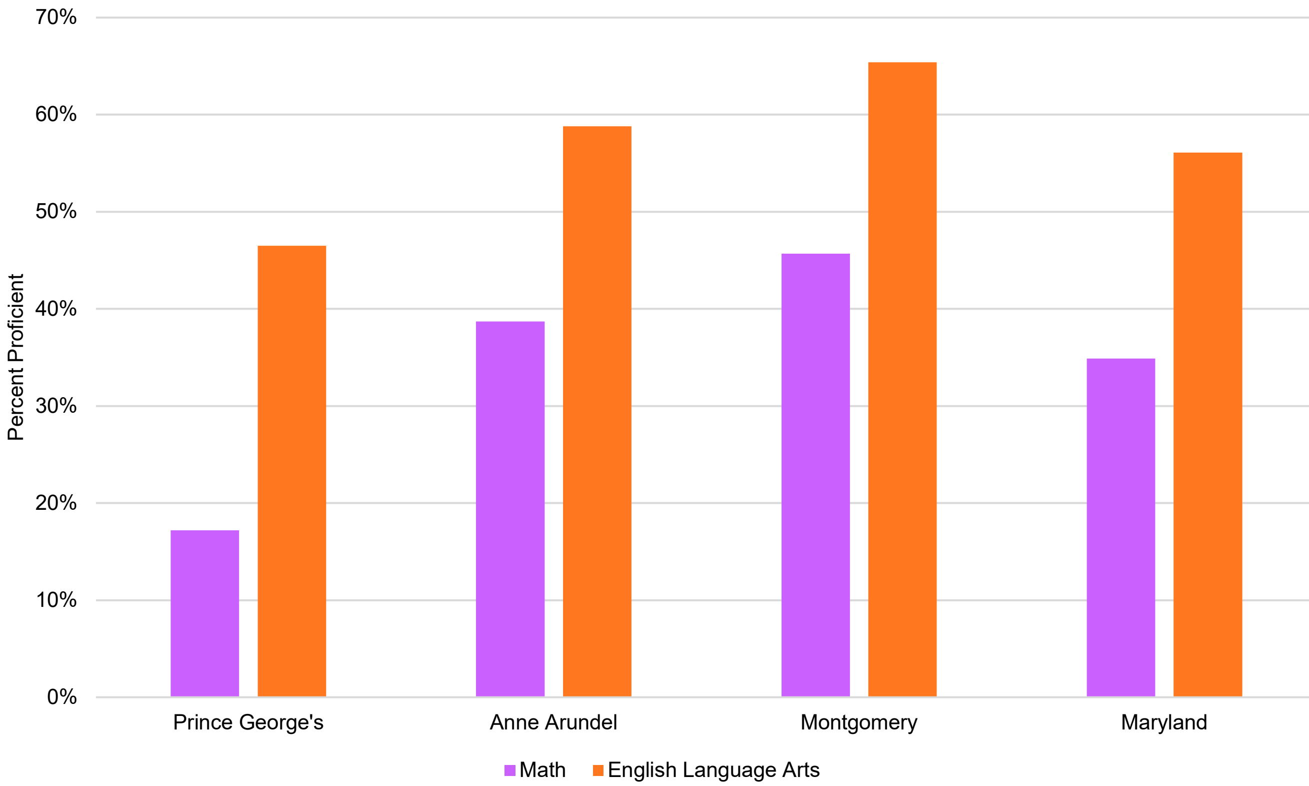


Source: MSDE

Standardized Testing

After the Spring of 2019, the Partnerships for Assessment of Readiness for College and Careers (PARCC) standardized test was discontinued and replaced with the Maryland Comprehensive Assessment Program (MCAP). The MCAP continues to evaluate students in Math and English Language Arts (ELA), but the assessments are shorter in duration. As Figure 22 illustrates, Math and ELA proficiency levels of high school students in Prince George's County lag those of the state and the neighboring counties of Montgomery and Anne Arundel. In 2023, only 46.5% of high school students in Prince George's County met ELA proficiency standards, and a mere 17.2% demonstrated proficiency in Math (Figure 23).

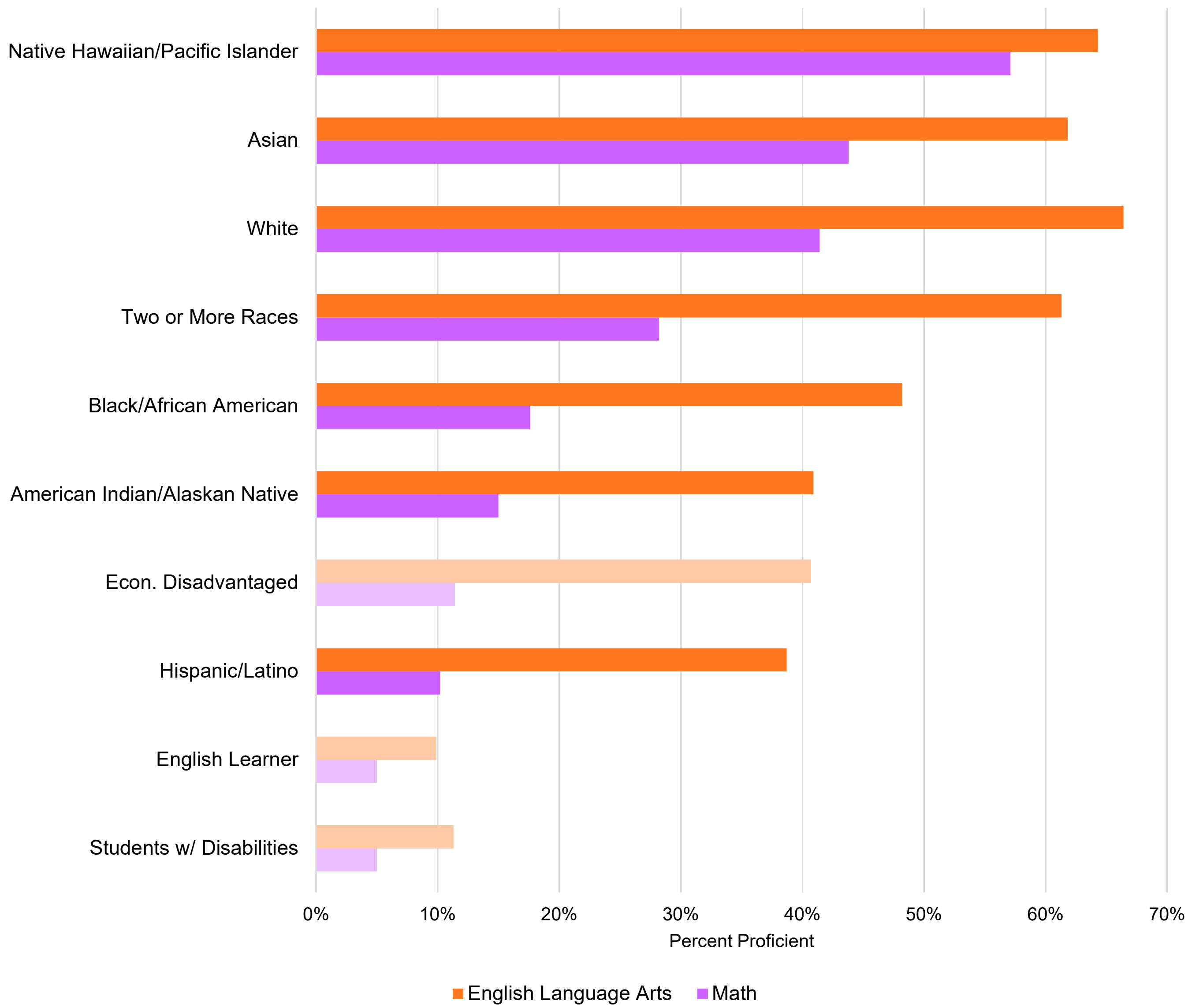
Figure 23 - Percent Proficient at the High School Level by Subject and Region, 2023



Source: MSDE

MCAP proficiency scores vary by race/ethnicity and student group. As illustrated in Figure 24, Native Hawaiian/Pacific Islander students exhibited the highest overall proficiency rates in Math in 2023, at 57.1%. White students led in ELA proficiency at 66.4%, closely followed by Asian (61.8%) and Native Hawaiian/Pacific Islander students (64.3%). In contrast, less than 40% of Hispanic/Latino students met ELA proficiency standards and approximately 20% demonstrated proficiency in Math.

Figure 24 – Percent Proficient at the High School Level by Subject and Student Group, Prince George's County, 2023



Source: MSDE

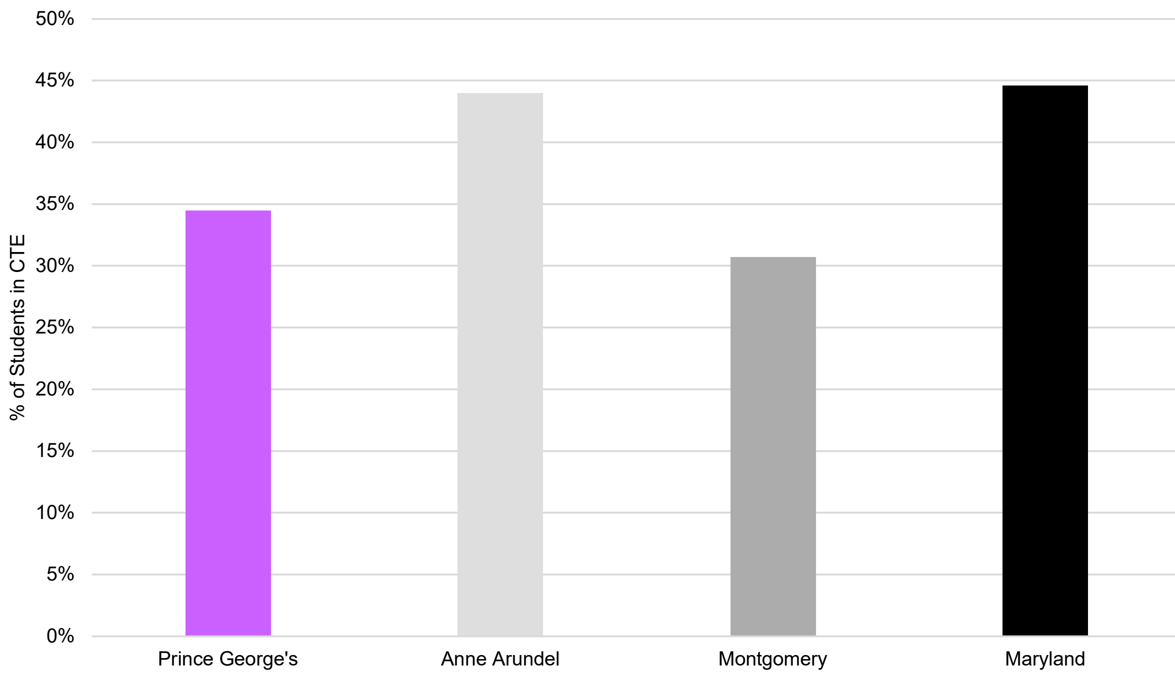
Career & Technical Education

Career and Technical Education (CTE) refers to educational programs that specialize in the skilled trades, applied sciences, modern technologies, and career preparation at the secondary school level. It is a critical element in helping students formulate career interests, learn applicable skills, and align with industry demand.

Enrollment

Of the more than 40,000 high school students in Prince George's County, just under 14,000 (~34.5%) high schoolers were enrolled in CTE courses in 2022. This exceeds the share of students participating in CTE in Montgomery County but lags the Maryland average of 44.6% (Figure 25). The share of students participating in CTE has also grown substantially, from just 20% in 2018 to 34.5% in 2022. The gender distribution among CTE students skews slightly male, with approximately 52% of CTE students being male and 48% female.

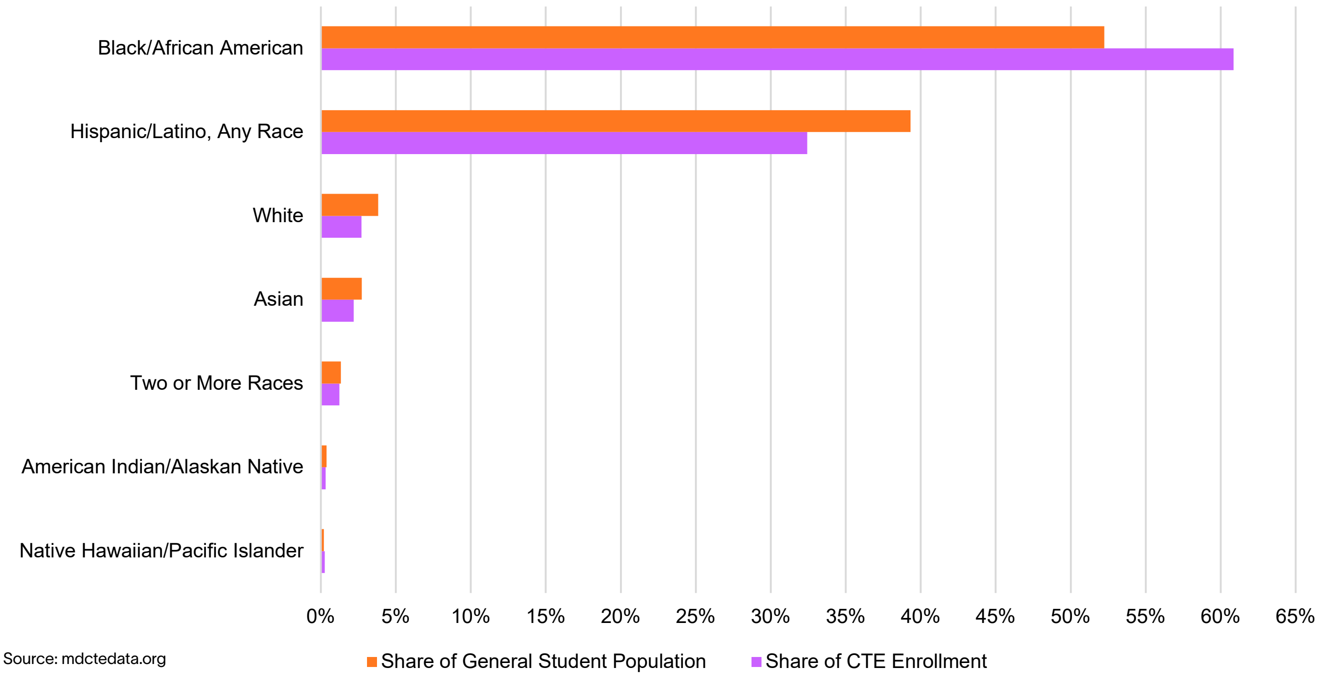
Figure 25 - CTE Enrollment Rate Comparison by Region, 2022



Source: mdctedata.org

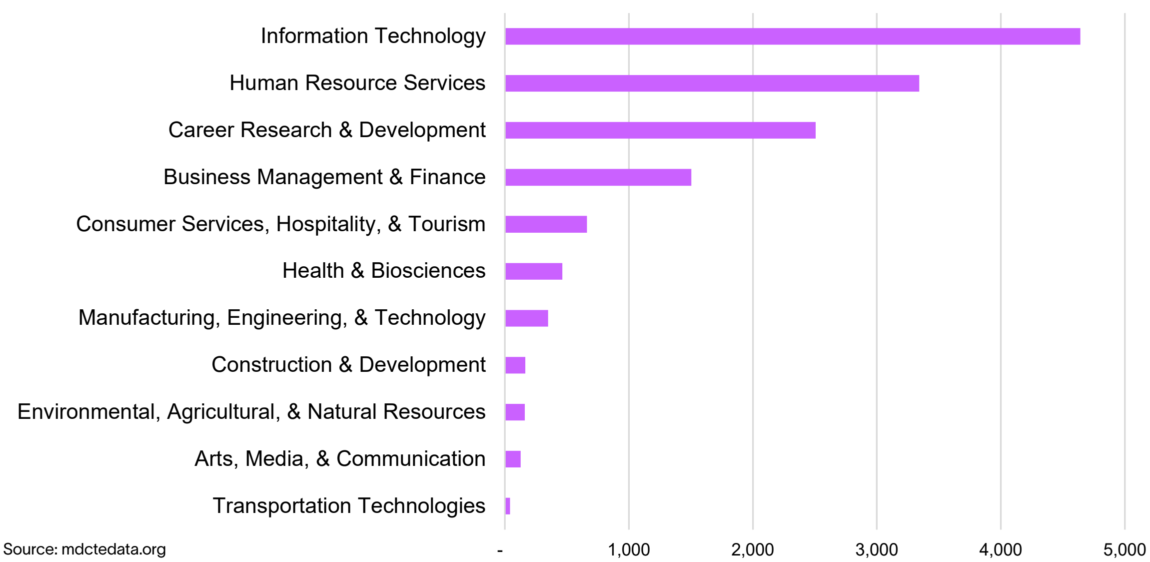
The Black student population is overrepresented in CTE enrollment, while all other race and ethnicity categories are underrepresented, particularly the Hispanic student population, as demonstrated by Figure 26. This further demonstrates the need to encourage greater engagement among the Hispanic student population, which is also affected by high absenteeism and dropout rates. Information Technology is the cluster with the highest CTE enrollment, followed by Human Resource Services, Career Research & Development, and Business Management & Finance (Figure 27).

Figure 26 – Prince George's County CTE Enrollment by Race/Ethnicity, 2022



Source: mdctedata.org

Figure 27 – Prince George's County CTE Enrollment by Cluster, 2022



Source: mdctedata.org

It is important to note that cluster interest varies by sex, as well as race and ethnicity. For example, female students are overrepresented in the Health & Biosciences cluster, while the Black student population is overrepresented in Business Management & Finance and Consumer Services, Hospitality, & Tourism. Interestingly, the Hispanic student population is largely underrepresented in these two clusters while being overrepresented in Transportation Technologies.[8]

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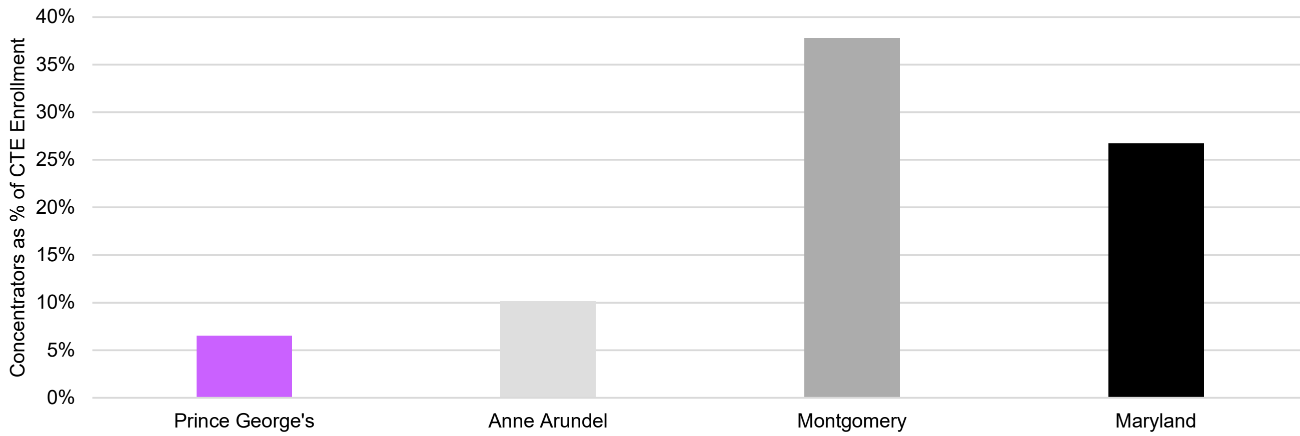
Progression

CTE progression is measured by tracking student concentrators. In Maryland, "a secondary student is counted as having concentrated in CTE if they have completed at least two courses in a CTE program and are enrolled in a third."[9] There is a significant drop-off between CTE enrollment and CTE concentrators. Only 6.5% of CTE enrollees become concentrators in Prince George's County, a rate that is drastically lower than that of Maryland and surrounding areas (Figure 28).

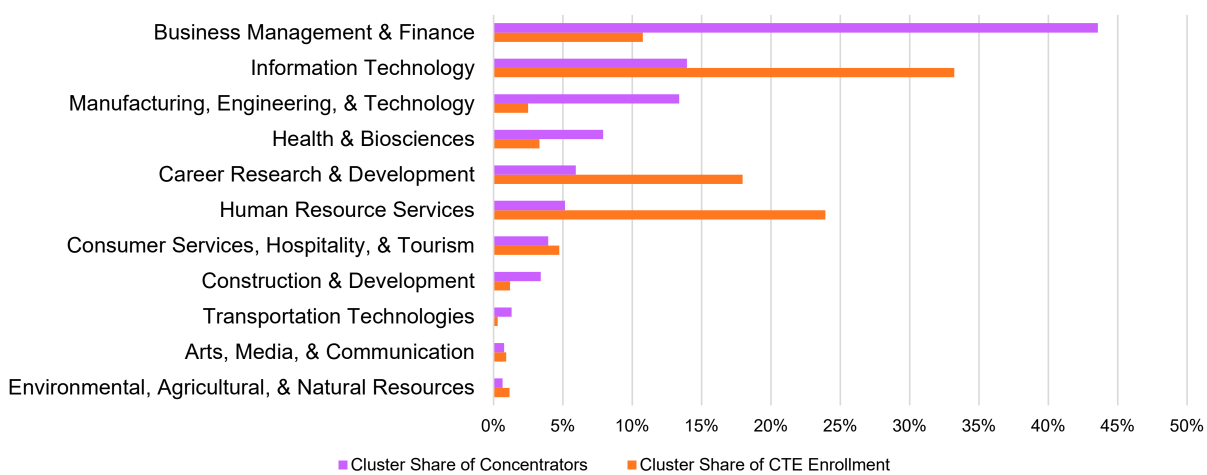
Figure 28 - Geographic Comparison of CTE Concentrators as Share of CTE Enrollment, 2022



Source: mdctedata.org

The largest CTE cluster in terms of enrollment does not necessarily align with CTE concentration. While Information Technology is the largest CTE cluster by enrollment, Business Management & Finance contains the most concentrators. In other words, some clusters retain students much better than others, as shown in Figure 29. This progression also varies by race & ethnicity, as shown by Figure 30.

Figure 29 - Prince George's County CTE Concentrators by Cluster, 2022



Source: mdctedata.org

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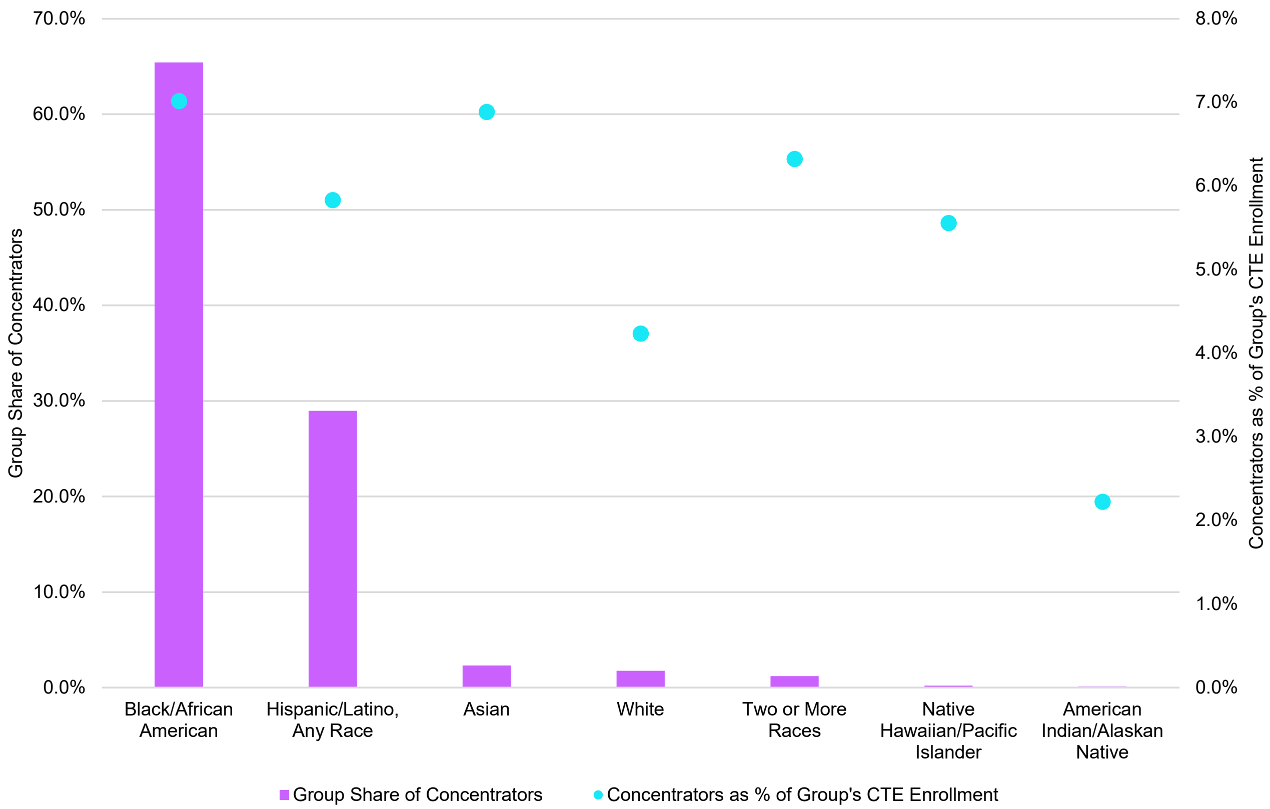
Figure 30 – Prince George's County CTE Concentrators by Race/Ethnicity, 2022



Source: mdctedata.org

Performance

There are two key indicators of CTE performance tracked by the Maryland State Department of Education: the CTE placement rate and the Technical Skill Assessment (TSA) pass rate. The placement rate is defined as the "number of CTE completers from the prior reporting year who enter postsecondary education, employment, or the military within two quarters after graduation divided by the number of CTE completers from the prior year reporting."[10]

Prince George's County's placement rate of 74.1% is lower than that of Montgomery County (85.9%), Anne Arundel County (80.9%), and the state average (80.9%), as shown in Figure 31. This rate varies by sex, race/ethnicity, and student group. The female placement rate of 77.4% exceeds the male placement rate of 71.1%. English Learners have the lowest placement rate at 35.6%. When considering race/ethnicity, Hispanics have the lowest placement rate (62.2%), while the Black (77.4%) and White (80.8%) populations have placement rates above the county target rate of 75.7%.[11]

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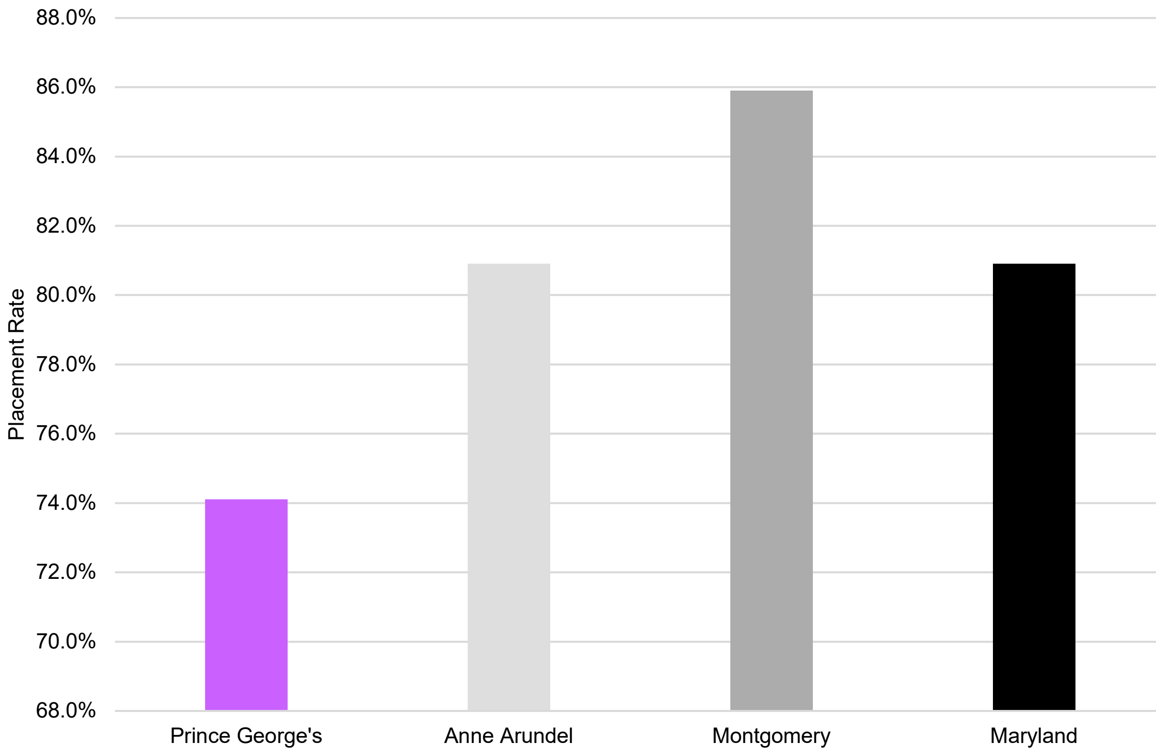
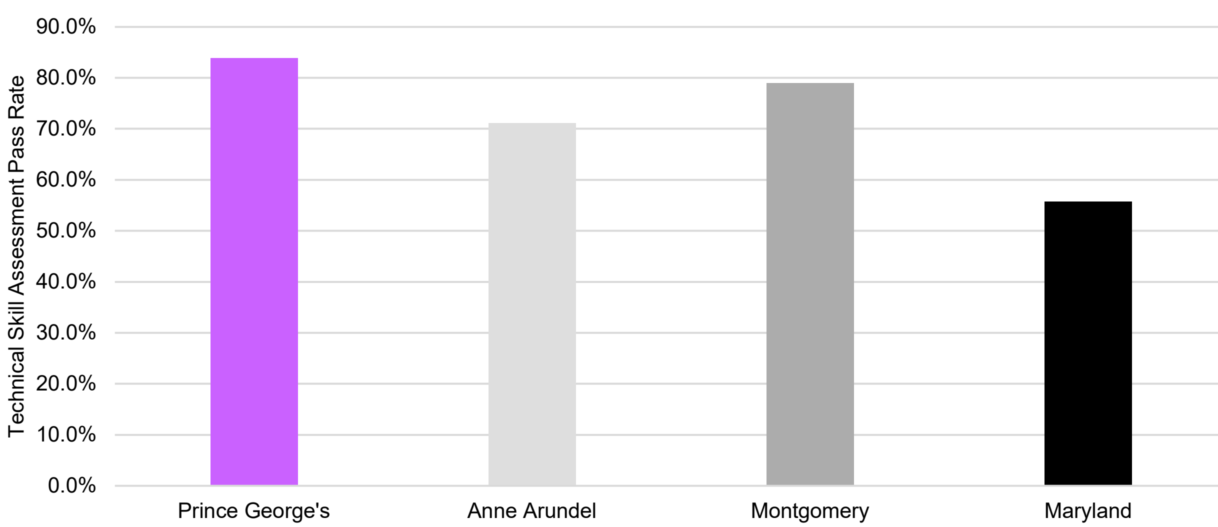
Figure 31 - Geographic Comparison of Placement Rates of CTE Completers, 2022



Source: mdctedata.org

The Technical Skill Assessment (TSA) pass rate is defined as "the number of CTE concentrators who passed an assessment aligned to CTE and industry standards divided by the number of CTE concentrators who took an assessment aligned to CTE and industry standards." The target pass rate for Prince George's County is 62.8%, which the county greatly exceeds with an 83.9% pass rate. It is intriguing that although the county's target was the lowest compared to Montgomery County, Anne Arundel County, and the Maryland statewide target, its TSA pass rate is the highest, as shown in Figure 32.

Figure 32 - Geographic Comparison of Technical Skill Assessment Pass Rates of CTE concentrators, 2022

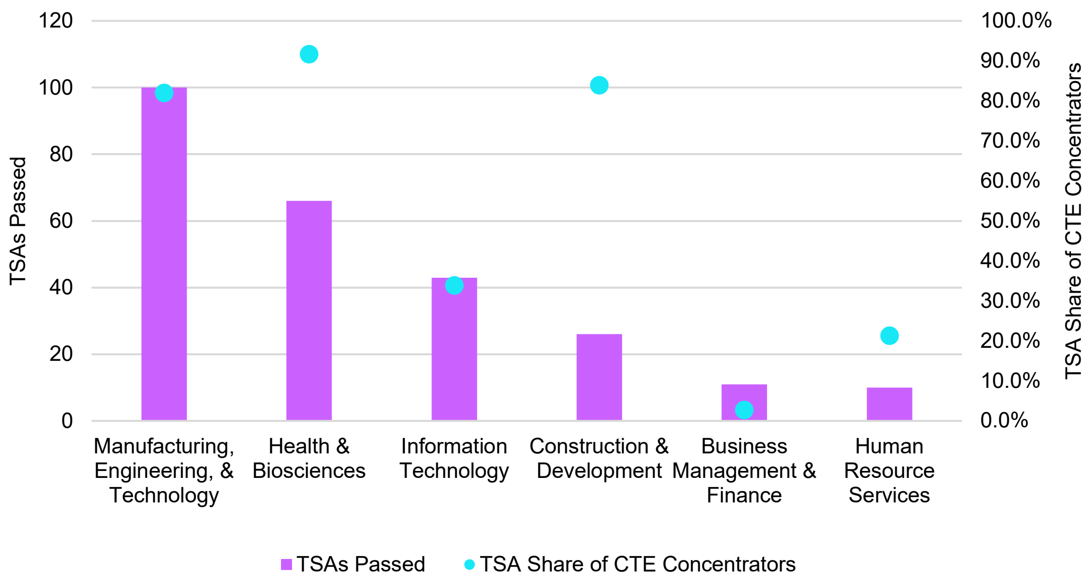


Source: mdctedata.org

Again, female students outperform male students in TSA pass rates. However, the White student population has the lowest TSA pass rate at 57.1%, compared to 85.0% for Black students and 81.2% for Hispanic students.[12]

The pass rate also varies by cluster. For instance, 91.7% of Health & Biosciences concentrators pass their TSA (Figure 33). Although Information Technology has the third-largest number of concentrators with a passed TSA, it has a very low pass rate of just 33.9%.

Figure 33 – Prince George's County CTE Concentrator TSA Attainment by Cluster, 2022



Source: mdctedata.org

Workforce Training & Education

Employ Prince George's provided Lightcast with the full Maryland Department of Labor's Education Training Provider List (ETPL) for the region as well as the Prince George's County Workforce Development Board's Local Training Provider List (LTPL) to assess how the workforce programs interface with the job market. Each program has an applicable CIP (Classification of Instructional Program) code, a standardized taxonomy of programs from the National Center for Education Statistics (NCES). Lightcast used its proprietary mapping to assign each program's CIP code to a relevant occupation via the Standard Occupational Classification (SOC) code system defined by the Bureau of Labor Statistics (BLS). Using this mapping, Employ Prince George's full suite of workforce programs can be mapped to occupations.

The ETPL and LTPL programs can be applied to 354 occupations. Of these, only 166 occupations are served by program completions, meaning more than half of the suite of programs are inactive. Lightcast then assessed the occupations being served by completions. Sixty-three percent (63%), or 105 of the 166 occupations, have median earnings above the living wage and are projected to grow into 2028, as shown by the points in purple in Figure 34 below.

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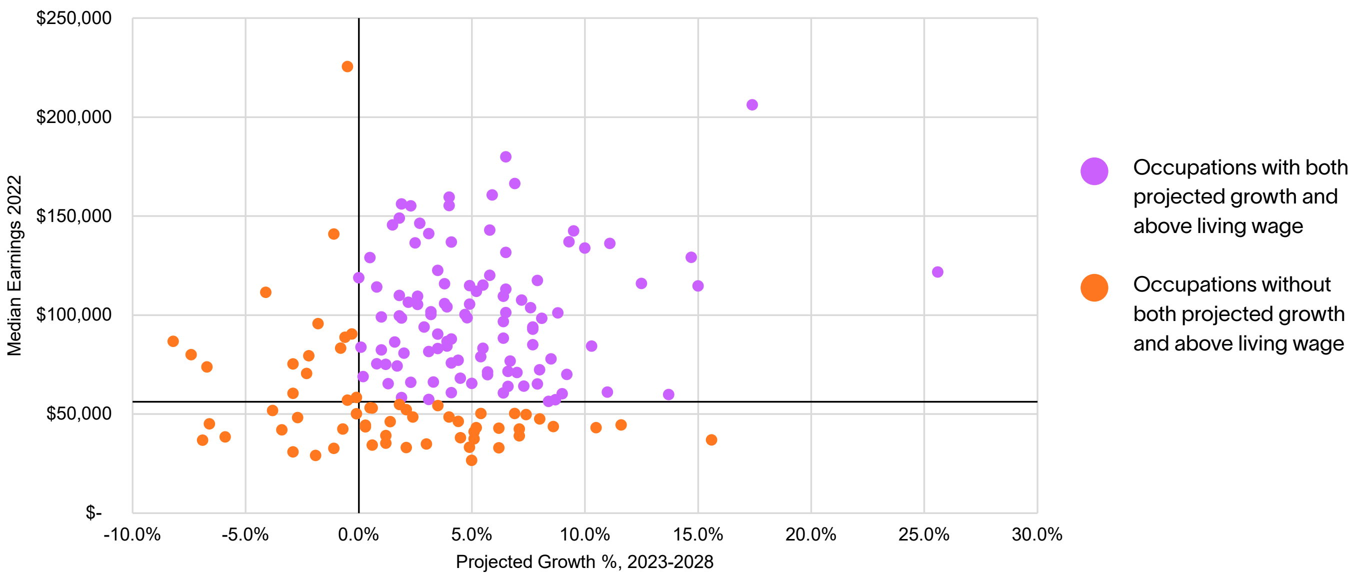
Figure 34 - Assessment of Occupations Served by ETPL & LTPL Completions



Source: Employ Prince George's & Lightcast

Note: The full list of ETPL-LTPL programs with their CIP-SOC mapping is provided to Employ Prince George's in a data file.

Post-Secondary Education

To find the output for all public and private education institutions in the region, Lightcast integrates data from the Integrated Post-secondary Education Data System (IPEDS). This data is publicly available through the NCES. As shown in Table 11, while post-secondary completions have grown into 2022, the growth rate has declined from 4.2% (2014-2018) to just 1.6% (2018-2022). Still, this growth rate exceeds both Maryland and the United States. Roughly 58% of the profiles graduating since 2018 and associated with the largest institutions (Bowie State University, Prince George's Community College, University of Maryland – College Park, and University of Maryland – Global Campus) have remained in Maryland, Virginia, or the District of Columbia.

Table 12 details the breakdown of completions by institution and award level. This data illustrates how different institutions focus on various levels of post-secondary education. For instance, the University of Maryland and Bowie State University primarily provide bachelor's degrees and higher, while institutions such as Prince George's Community College offer programs that confer awards and associate degrees.

Table 11 - All Post-Secondary Completions by Geography

	Post-Secondary Completions			**CAGR**	
Region	**2014**	**2018**	**2022**	**2014-2018**	**2018-2022**
Prince George's County	25,051	29,557	31,508	4.2%	1.6%
Maryland	86,215	89,348	90,291	0.9%	0.3%
United States	4,954,482	5,174,203	5,367,310	1.1%	0.9%

Source: Lightcast

Table 12 - Prince George's County Completions by Institution and Type, 2022

	Award of less than 1 academic ear	Award of at least 1 but less than 2 acadamic years	Associate Degree	Award of at least 2 but less than 4 academic years	Bachelor's Degree	Post-Baccalaureate Certificate	Master's Degree	Doctorate Degree
Bowie State University	Not Offered	Not Offered	Not Offered	Not Offered	851	2	212	6
Capitol Technology University	1	Not Offered	-	Not Offered	65	-	46	80
Fortis College-Landover	Not Offered	260	44	Not Offered	Not Offered	Not Offered	Not Offered	Not Offered
Hair Academy	9	85	Not Offered	Not Offered	Not Offered	Not Offered	Not Offered	Not Offered
Hair Academy II	47	42	Not Offered	Not Offered	Not Offered	Not Offered	Not Offered	Not Offered
Prince George's Community College	187	59	1,354	Not Offered	Not Offered	Not Offered	Not Offered	Not Offered
Strayer University-Maryland	Not Offered	1	144	Not Offered	274	9	116	Not Offered
University of Maryland-College Park	Not Offered	Not Offered	Not Offered	48	9,182	222	2,460	641
University of Maryland Global Campus	Not Offered	Not Offered	2,194	508	7,982	372	3,973	32
TOTAL	244	447	3,736	556	18,354	605	6,807	759

Source: Lightcast

Almost half of all regional completions are concentrated in Business, Management, & Marketing and Computer & Information Sciences. Notably, Computer & Information Sciences experienced the greatest net increase in annual regional completions between 2018 and 2022 (Table 13).

Table 13 – Top Completions by Individual Program, Prince George's County

	Regional Completions		% of Total Completions	Change in Completions	Related Employment	Regional Annual Openings	
Program	**2018**	**2022**	**2022**	**2018 vs. 2022**	**2022**	**2022**	**Median Hourly Earnings**
Business, Management, Marketing, and Related Support Services	7,995	7,793	24.7%	(202)	146,853	17,739	$33.09
Computer and Information Sciences and Support Services	5,270	6,486	20.6%	1,216	39,528	4,162	$45.94
Liberal Arts and Sciences, General Studies and Humanities	2,343	3,008	9.5%	665	66,659	8,559	$31.99
Health Professions and Related Programs	2,025	1,877	6.0%	(148)	95,974	10,690	$35.59
Social Sciences	1,886	1,868	5.9%	(18)	48,611	5,252	$42.91
Engineering	1,922	1,612	5.1%	(310)	32,116	3,109	$48.89
Psychology	915	1,204	3.8%	289	19,343	2,103	$37.07
Biological and Biomedical Sciences	838	1,066	3.4%	228	25,868	2,576	$47.51
Communication, Journalism, and Related Programs	668	825	2.6%	157	22,277	2,494	$43.84
Education	698	714	2.3%	16	35,804	4,063	$33.29
Homeland Security, Law Enforcement, Firefighting and Related Protective Services	664	668	2.1%	4	45,533	5,561	$39.69
Multi/Interdisciplinary Studies	358	502	1.6%	144	124,813	14,975	$34.77
Public Administration and Social Service Professions	306	424	1.3%	118	35,612	4,121	$42.32
Mathematics and Statistics	332	353	1.1%	21	19,160	1,865	$42.75
Visual and Performing Arts	318	348	1.1%	30	34,704	3,702	$40.43
Physical Sciences	254	267	0.8%	13	25,966	2,673	$49.09
English Language and Literature/Letters	313	264	0.8%	(49)	11,557	1,212	$37.16
Agricultural/Animal/Plant/Veterinary Science And Related Fields	284	246	0.8%	(38)	43,849	5,405	$34.49
History	246	240	0.8%	(6)	8,010	824	$42.10
Parks, Recreation, Leisure, Fitness, and Kinesiology	265	232	0.7%	(33)	30,918	4,126	$36.48
Culinary, Entertainment, and Personal Services	249	213	0.7%	(36)	20,910	3,976	$16.57
Foreign Languages, Literatures, and Linguistics	268	194	0.6%	(74)	19,268	1,935	$33.30
Communications Technologies/Technicians and Support Services	159	175	0.6%	16	7,480	880	$44.29
Architecture and Related Services	129	153	0.5%	24	20,252	2,426	$35.84
Family and Consumer Sciences/Human Sciences	199	146	0.5%	(53)	39,511	5,239	$23.92
Legal Professions and Studies	116	141	0.4%	25	19,959	2,230	$32.68
Natural Resources and Conservation	161	130	0.4%	(31)	44,959	5,037	$48.41
Area, Ethnic, Cultural, Gender, and Group Studies	135	107	0.3%	(28)	9,305	1,019	$38.81

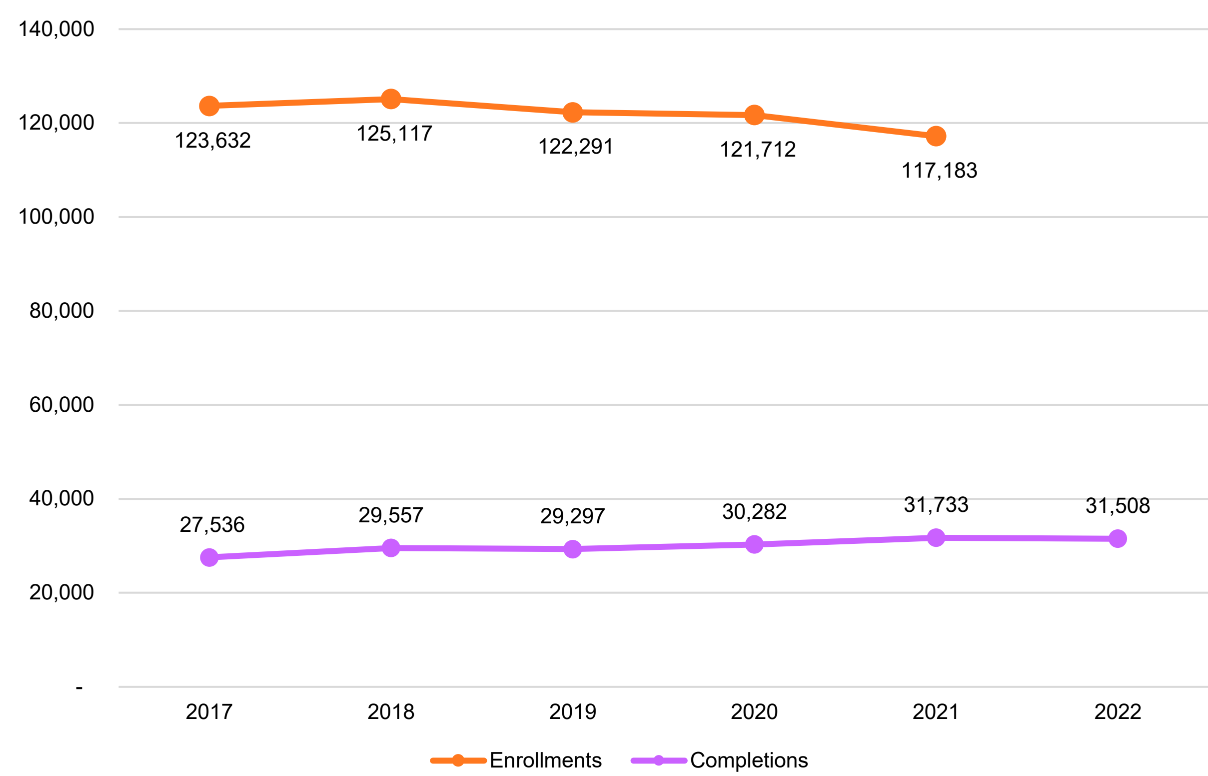
Library Science	101	105	0.3%	4	8,471	1,038	$30.09
Philosophy and Religious Studies	41	72	0.2%	31	16,673	1,721	$46.30
Engineering/Engineering-related Technologies/Technicians	15	28	0.1%	13	73,325	8,452	$41.49
Mechanic and Repair Technologies/Technicians	5	26	0.1%	21	30,519	3,831	$33.19
Construction Trades	68	12	0.0%	(56)	63,891	8,026	$28.59
Military Technologies and Applied Sciences	0	7	0.0%	7	25,659	3,232	$46.23
Transportation and Materials Moving	0	2	0.0%	2	25,870	3,521	$24.08
Theology and Religious Vocations	11	0	0.0%	(11)	12,684	1,409	$42.49

Source: Lightcast

The demographic shifts discussed earlier in this report pose significant challenges for higher education, particularly due to a decline in the younger population, leading to reduced post-secondary enrollments. This trend is expected to affect institutions in Prince George's County as well.

From 2017 to 2022, enrollments in Prince George's County decreased, while the number of degree completions slightly increased. This pattern is consistent with the typical delay in completions relative to enrollments, given that the majority (58%) of these completions are bachelor's degrees, which generally take about four years to complete. Moving forward, a decline in completions is anticipated, reflecting the earlier decrease in enrollments unless countered by an increase in graduation rates. The initial signs of this expected decline were evident between 2021 and 2022, with a modest reduction of just over 200 completions, as depicted in Figure 35. This downturn in completions has significant implications for the labor market, suggesting that employers may soon encounter a shrinking pipeline of skilled talent.

Figure 35 – Prince George's County Post-Secondary Enrollments & Completions over Time



Source: Lightcast

Employment & Labor Force Profile

The labor force is composed of individuals aged 16 and over in the civilian noninstitutionalized population, including those classified as both employed and unemployed. According to the US Bureau of Labor Statistics, "employed" persons are those aged 16 and over in the civilian noninstitutionalized population who are either working (including part-time and self-employed) or have a job but were temporarily absent from work. Each employed person is counted only once, even if they hold more than one job.

Nationwide, slowing labor force growth is due to several factors, including but not limited to:

- Demographic shifts driven by low fertility rates, resulting in fewer young people as a percentage of the population and a larger share of retirees out of the labor force.
- Hidden workers who do not participate in the labor force as fully as others, such as people with disabilities, the formerly incarcerated, and those afflicted with mental illness.
- People who stay in school longer or return to school.

Employment Trends

Employment & Unemployment

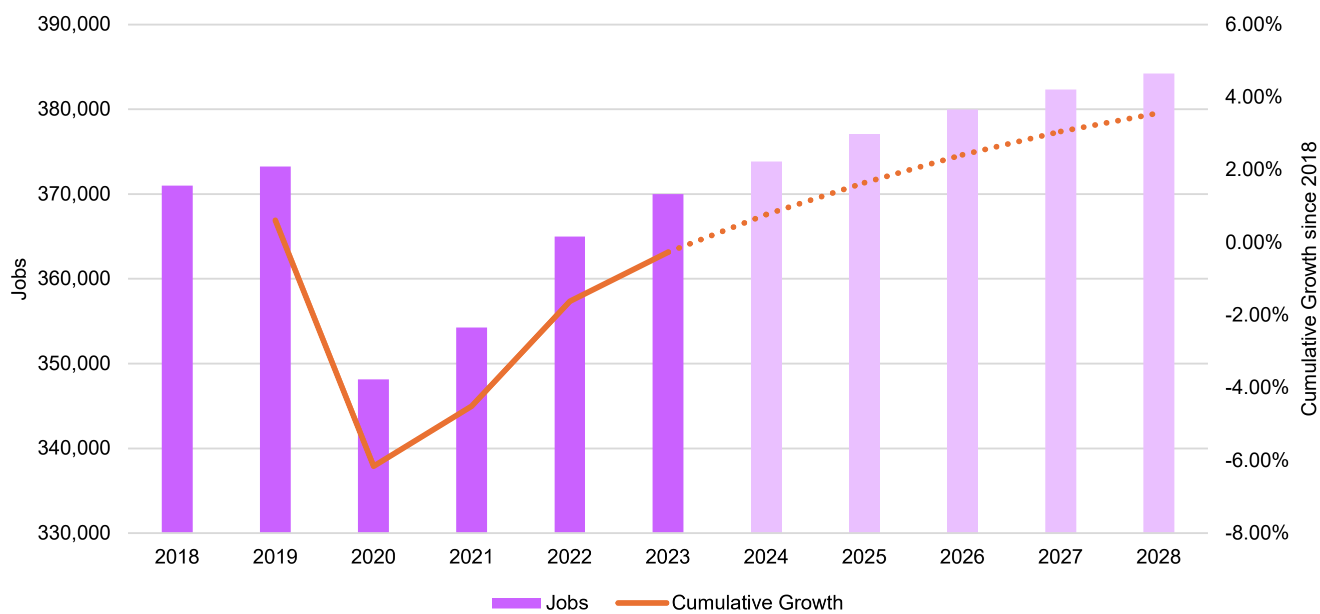
The labor force in Prince George's County reached 497,045 people in 2023, indicating a decline from the 2018 figure (Table 14). Much of this decline is due to the impact of the pandemic, which also reduced the labor force at the state level. In fact, as of 2023, employment had not fully recovered to pre-pandemic levels, as demonstrated by Figure 36 below. However, employment is expected to reach and surpass the pre-pandemic 2019 figure by the end of 2024.

Table 14 - Labor Force Trends by Region

	Labor Force			Compound Annual Growth Rate (CAGR)	
Region	**2013**	**2018**	**2023**	**2013-2018**	**2018-2023**
Prince George's County	485,941	514,880	497,045	1.2%	-0.7%
Maryland	3,117,158	3,292,917	3,195,545	1.1%	-0.6%
United States	154,408,000	162,510,000	166,661,000	1.0%	0.5%

Source: BLS Local Area Unemployment Statistics (LAUS)

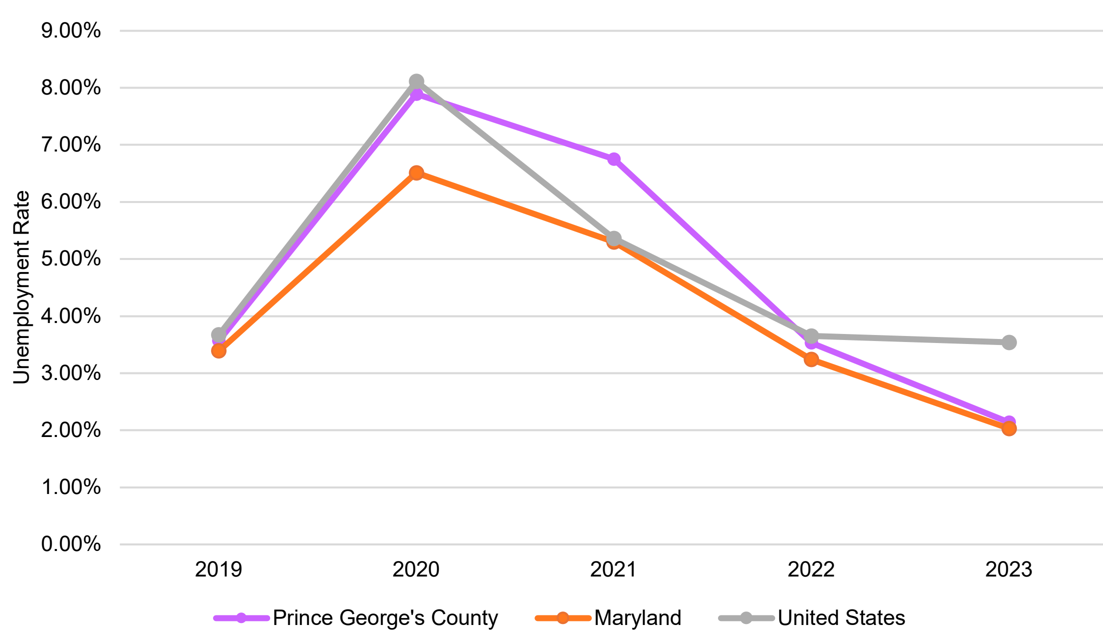
Figure 36 – Prince George's County Employment Trends



Source: Lightcast

Unemployment reached almost 8% at the height of the pandemic, surpassing Maryland, but has trended downwards for the last 3 years. Unemployment was just 2.14% in 2023, creating an extremely tight labor market, even when compared to the national rate of 3.54% (Figure 37). An extremely low unemployment rate, such as this, limits job recovery because of the smaller pool of talent seeking employment opportunities.

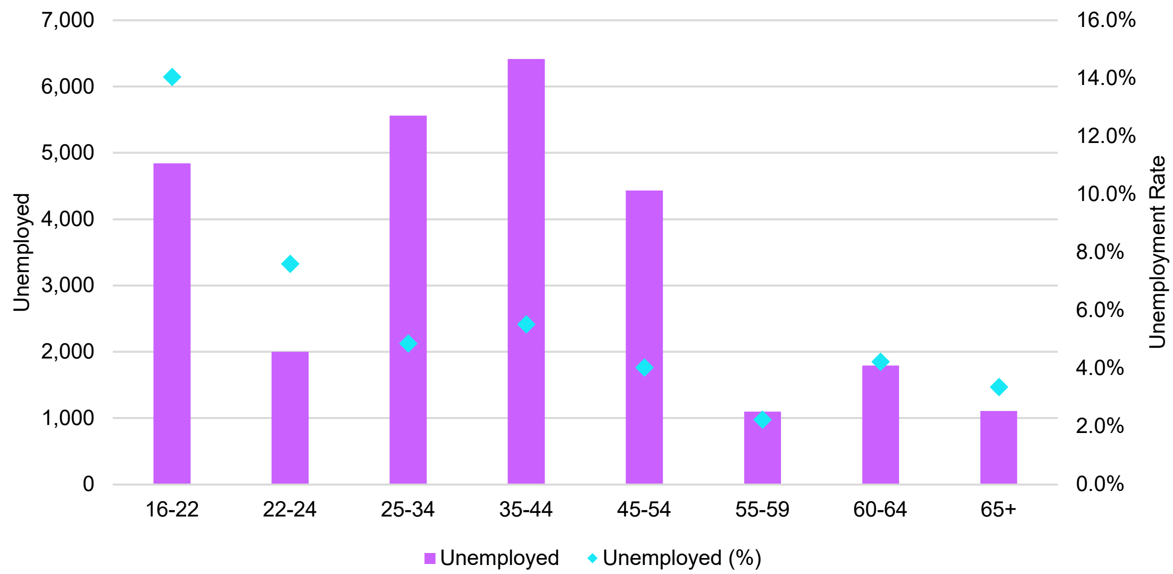
Figure 37 - Unemployment Rate Trends



Source: Lightcast

The unemployment rate varies across different populations. Men experience unemployment at a slightly higher rate than women (5.4% compared to 5.0%). Young people aged 16-22 have the highest unemployment rate at 14.0%, but this age cohort only accounts for the third-highest volume of unemployed persons. This age group generally has a smaller share of individuals participating in the labor force, as many opt to delay entering the workforce in favor of pursuing higher education. Conversely, the 35-44 age group, despite having an unemployment rate of 5.5%, has the most individuals actively seeking employment (Figure 38).

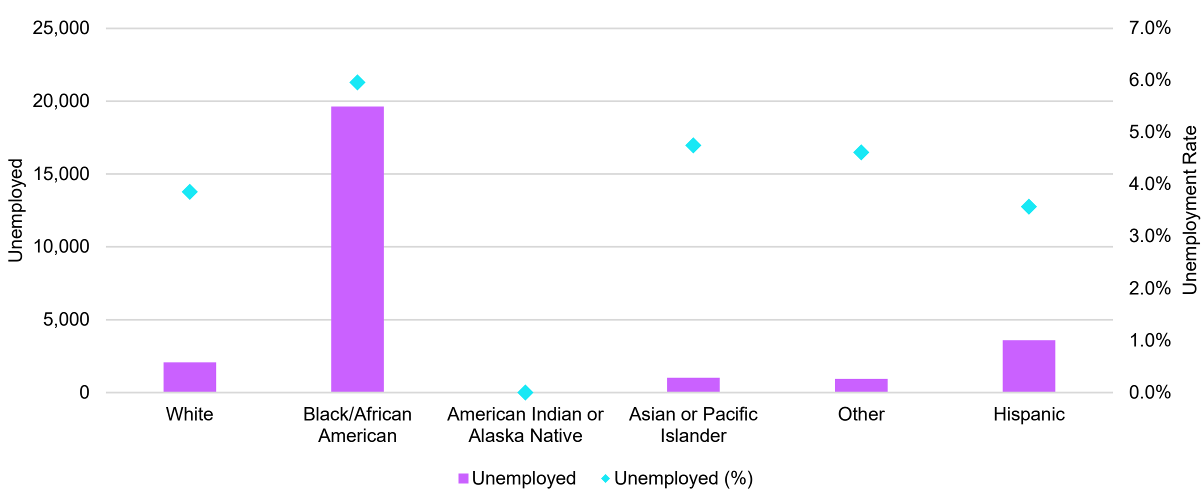
Figure 38 - Unemployment Rate by Age Group, Prince George's County, 2022



Source: ACS 1-Year

The Black population has the highest unemployment rate at 6.0% and accounts for 72% of all unemployed persons, despite constituting 61% of the population. Conversely, Hispanics have the lowest unemployment rate at 3.6% (Figure 39).[13]

Figure 39 - Unemployment Rate by Race/Ethnicity, Prince George's County, 2022



Source: ACS 1-Year

13 Note: Lightcast unemployment figures come from the BLS Current Population Survey (CPS) which may explain the differences between the overall unemployment rates in Figure 37 and the unemployment rates by demographic in Figure 38, which come from the ACS.

Underemployment

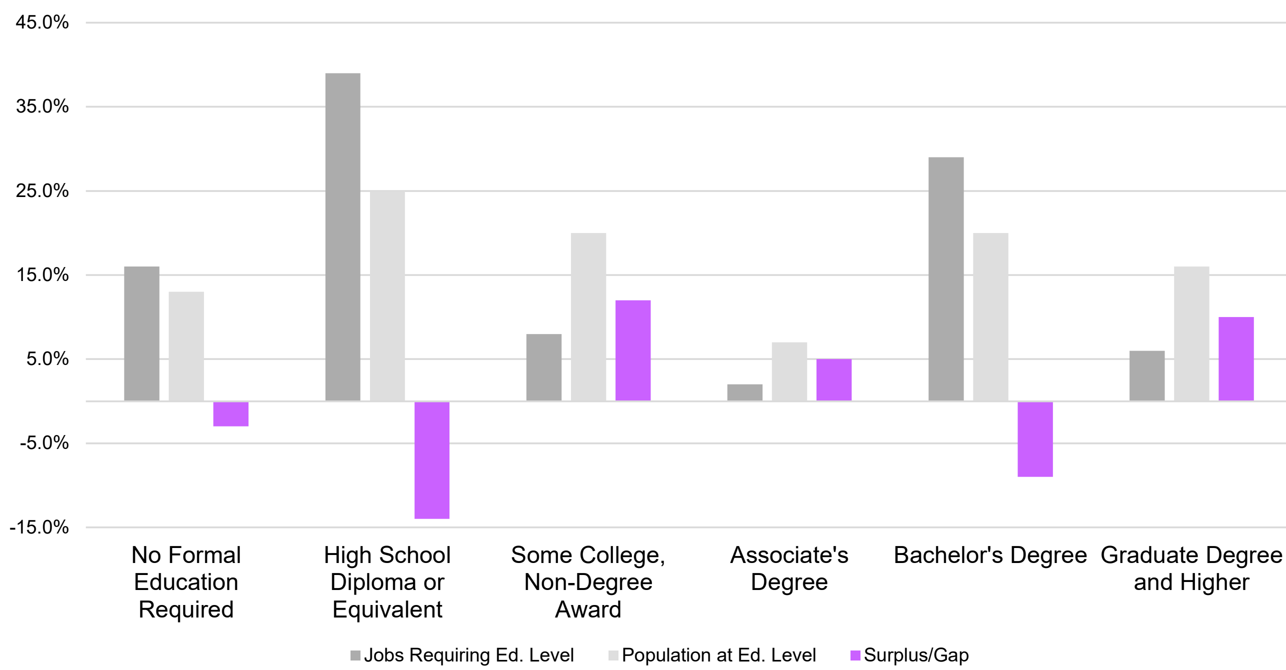
Underemployment does not have one set definition. For this study, we consider two definitions of underemployment:

- Individuals whose educational attainment exceeds the requirements of their current employment
- Individuals who earn below a living wage

To measure underemployment in Prince George's County, we compare the share of jobs requiring a certain educational level with the share of the population possessing that education level. A portion of the county's workforce experiences underemployment, meaning people often hold an education level higher than what their jobs require.

For instance, in this region, there are more individuals holding graduate degrees or higher qualifications than there are jobs demanding such credentials (Figure 40). This surplus of highly educated individuals has a cascading effect: some may take jobs that require lower levels of education, such as a bachelor's degree, while others may seek employment opportunities outside the region, potentially impacting the retention of skilled talent. This underscores the critical need for aligning educational offerings with employer needs and diversifying industries to create more job prospects for those with advanced degrees.

Figure 40 - Underemployment in Prince George's County, 2023



Source: ACS 1-Year

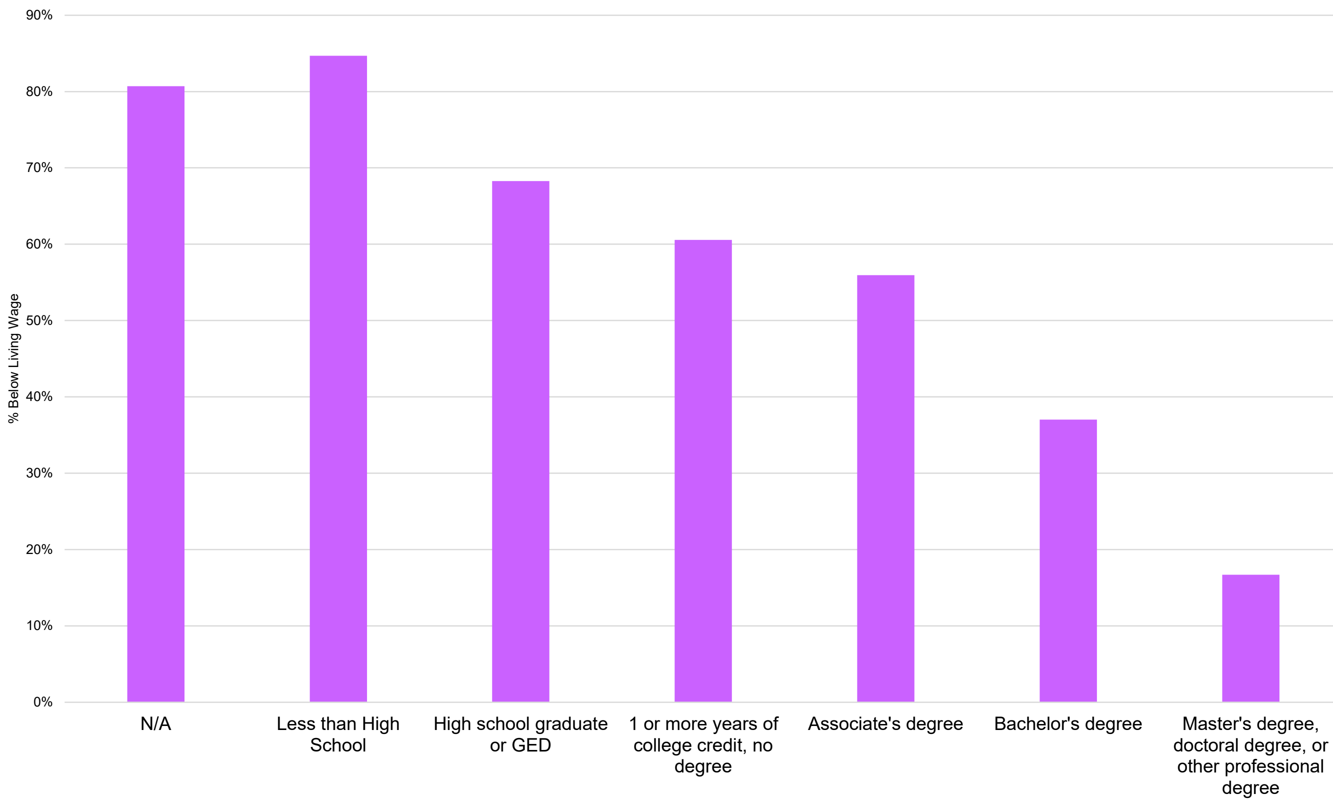
Underemployment can also refer to individuals who are employed but are not earning enough to meet their financial needs or expectations. To measure this, we observe the share of population groups earning below a living wage as defined by the MIT Living Wage Calculator.[14] By age group, underemployment is most prevalent among young people (ages 16-24) in Prince George's County, where over 90% earn below living wages. This high rate is mainly due to their limited time in the labor market, which translates to less education, skills, and experience—factors that typically contribute to higher wages. The underemployment rate decreases to 62% for individuals aged 25–34 before stabilizing between 40% and 50% for older age groups.

Among racial and ethnic groups, Hispanics experience the highest rate of underemployment at 79%, followed by Asians at 59%, Blacks at 46%, and Whites at 40%. These rates intuitively align with the educational attainment levels within these demographic

14 Living Wage for 1 Adult, 0 Children in Prince George's County calculated as $26.15.

categories in the county, as higher education levels generally lead to higher earnings. Figure 41 illustrates the share of the population earning below a living wage by education level, clearly showing that the share below living wage decreases progressively with each higher level of education.

Figure 41 - Share of Population Below Living Wage by Education Level, Prince George's County, 2022



Source: ACS 5-Year

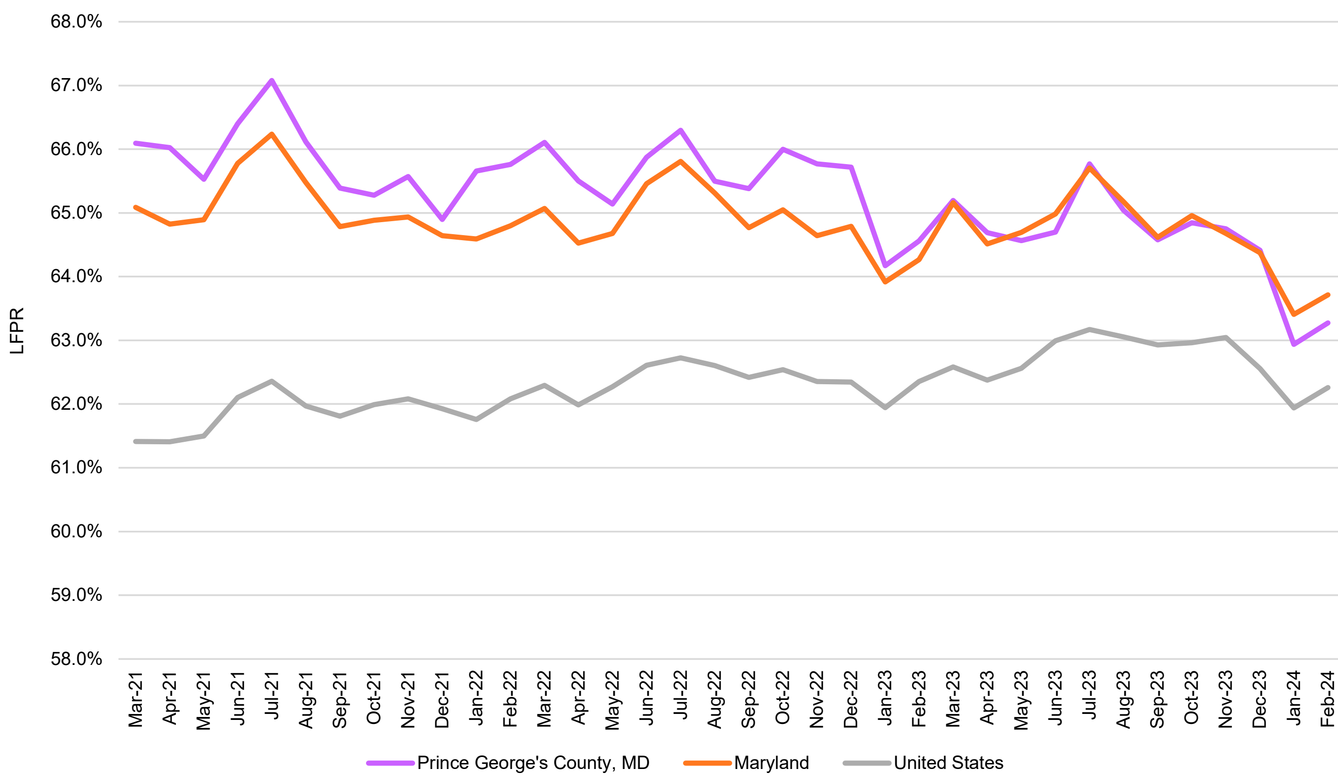
Labor Force Participation

The labor force participation rate (LFPR) is a key metric for assessing economic health, particularly under tight labor market conditions. It is calculated as the number of people aged 16 and older who are either employed or actively seeking employment, divided by the total non-institutionalized, civilian working-age population. A high participation rate usually indicates a robust economy where people are confident in their job prospects and actively engaging in the labor market.

The LFPR can also be influenced by demographic trends. For example, as the population ages and more individuals enter retirement, the participation rate tends to decrease. Nationally, the LFPR has been on a decline since the new millennium, coinciding with the retirement of the first baby boomers. It saw a brief recovery between 2016 and 2020 but experienced a sharp decline due to the pandemic, though it has since returned to pre-pandemic levels.

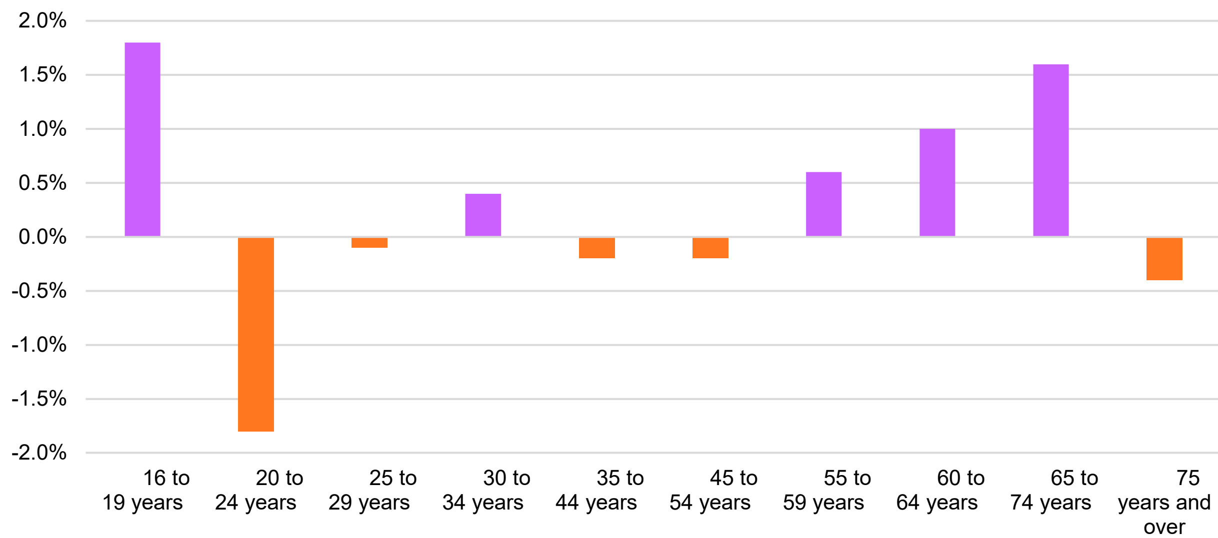
Despite a national increase in LFPR since 2021, both Maryland and Prince George's County have seen declines (Figure 42). Historically, the county's LFPR has been higher than both the state and national averages, but this advantage has been diminishing. When analyzing participation rates by age group, there is an intriguing trend where those nearing retirement age and those between 65 and 74 have shown increased participation rates in 2022 compared to 2018 (Figure 43). This increase is likely due to individuals delaying retirement amid the high inflation rates of 2022.

Figure 42 - LFPR Trend Comparison, Mar 2021- Feb 2024



Source: Lightcast

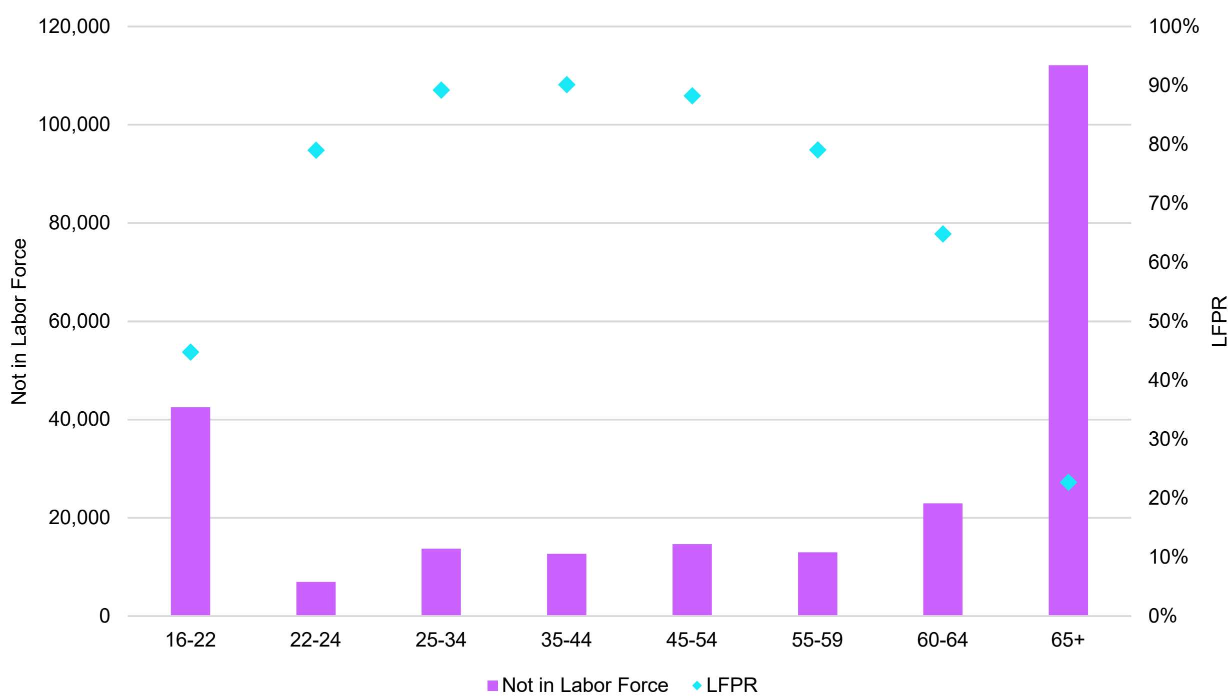
Figure 43 - LFPR by Age Group, Prince George's County (Change in % Points, 2018-2022)



Source: ACS 5-Year

Labor force participation rates also vary by gender, age, and race/ethnicity in Prince George's County. The male LFPR is higher than that of females, as women more frequently take on childcare responsibilities, which can limit their participation in the labor force. Comparisons by age group show that labor force participation is lowest among young people, primarily due to their delayed entry into the workforce in favor of pursuing higher education. The LFPR peaks at 90% for those aged 35-44 and then gradually decreases as individuals approach retirement age (Figure 44).

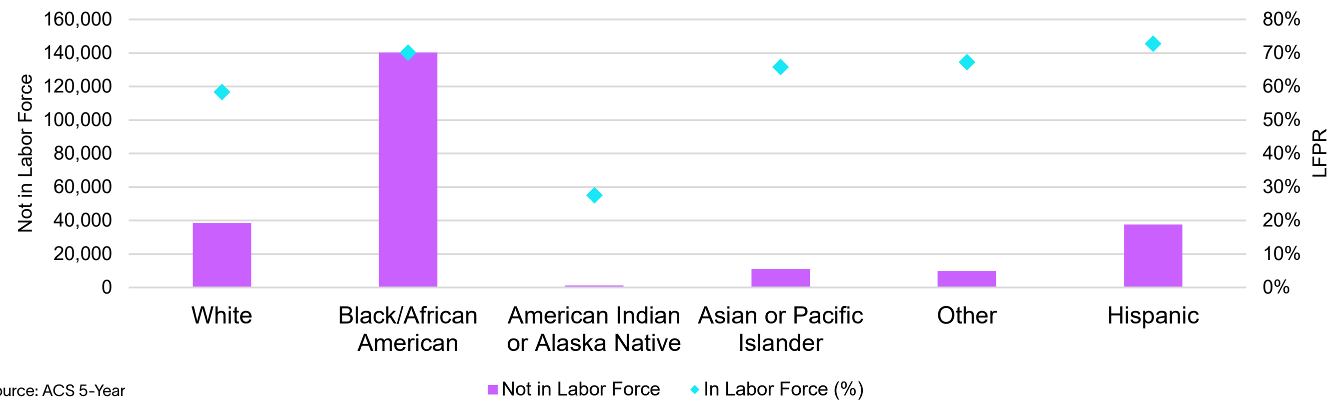
Figure 44 – LFPR by Age, Prince George's County, 2022



Source: ACS 5-Year

Figure 45 demonstrates how LFPR varies by race and ethnicity. The Black population, being the largest race and ethnicity group, has a significant number of individuals not in the labor force but still maintains the second-highest LFPR at 70%, following Hispanics at 73%. Conversely, the White demographic group, with a participation rate of 58%, has the second highest number of people out of the labor force.

Figure 45 - LFPR by Race/Ethnicity, Prince George's County, 2022

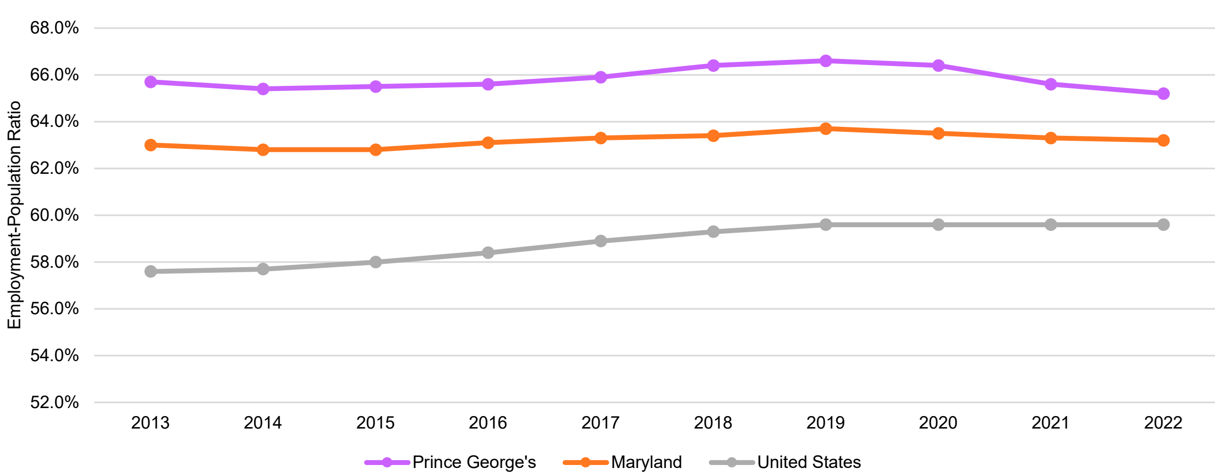


Source: ACS 5-Year

The employment-to-population ratio is a crucial economic indicator that measures the proportion of the working-age population that is employed. It provides a broad perspective on the health of an economy, showing how effectively the labor force is being utilized. Unlike the unemployment rate, which only counts those actively seeking work, this ratio includes all employed individuals, offering a more comprehensive view of labor market engagement. Higher ratios typically indicate a robust economy with plentiful job opportunities, whereas lower ratios may signal economic distress and job scarcity.

Like the LFPR, the employment-to-population ratio shows a higher degree of workforce engagement in Prince George's County compared to both Maryland and the national average, as depicted in Figure 46. However, this ratio has been declining since 2019, likely, in part, a consequence of the pandemic. While the county's population has grown, employment levels have not rebounded to pre-pandemic figures. Additionally, this ratio can be influenced by demographic shifts, such as an increase in the retirement-age population, which contributes to a larger non-working segment and thus, does not enhance employment figures despite population growth. This demographic trend can place downward pressure on the employment-to-population ratio, reflecting changes not solely based on economic conditions but also on population dynamics.

Figure 46 - Employment to Population Ratio by Region, 2013-2022



Source: ACS 5-Year

Public Health

Public health significantly influences labor force participation rates by affecting individuals' health status, access to healthcare, and overall well-being. When people are physically or mentally unwell or live with disabilities, their capacity to engage fully in the labor market can be substantially diminished. The pandemic heightened awareness of public health's integral role and underscored its direct and indirect impacts on the labor market. These impacts include not only the immediate effects of illness but also long-term consequences such as increased disability rates and mental health issues, which can impede workforce participation and productivity.

Access to Care

Approximately 11.5% of Prince George's County's population lacks health insurance, a rate that is higher compared to surrounding areas but better than the national average (Table 15). Despite this, over 74% of the population had an annual checkup in 2021, which is slightly higher than neighboring areas.

Table 15 – Healthcare Access Metrics, 2021

Region	Share of Population without Health Insurance	Share of Population with Annual Checkup
Prince George's County	11.5%	74.4%
Anne Arundel County	7.3%	73.4%
Montgomery County	8.3%	70.1%
Washington, D.C.	6.1%	69.2%
Maryland	8.2%	-
United States	12.2%	-

Source: Centers for Disease Control (CDC), KFF (Kaiser Family Foundation)

Unfortunately, the county faces constraints in terms of available healthcare providers as evidenced by Table 16, which shows that the ratios of population to primary care physicians, dentists, and mental health providers are quite high.

Table 16 - Ratio of Population to Providers by Type and Area, 2021

Region	Primary Care Physician	Dentist	Mental Health Provider
Prince George's County	2020:1	1580:1	460:1
Anne Arundel County	1490:1	1370:1	380:1
Montgomery County	740:1	790:1	250:1
Washington, D.C.	780:1	770:1	150:1
Maryland	1180:1	1240:1	290:1
United States	1330:1	1360:1	320:1

Source: County Health Rankings & Roadmaps

Disabilities

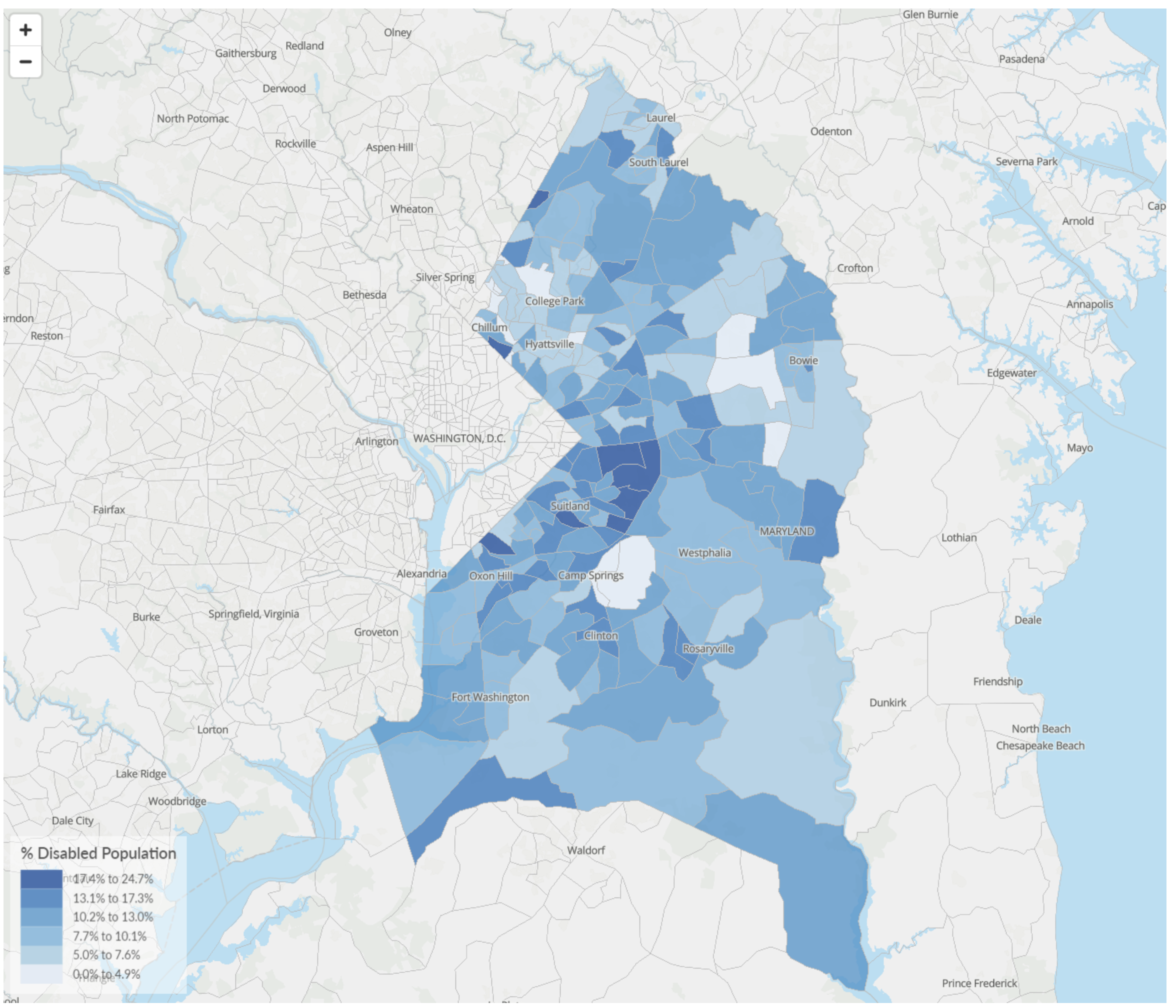
Prince George's County has a smaller share of the population with disabilities compared to Anne Arundel County, Washington, D.C., Maryland, and the United States (Table 17). Specific areas within the county, such as Capitol Heights, District Heights, and Suitland, have high concentrations of individuals with disabilities compared to the rest of the county (Figure 47).

Table 17 – Size and Share of Population with Disabilities by Region, 2023

Region	Population with Disabilities	% Population with Disabilities
Prince George's	92,945	9.8%
Anne Arundel	58,364	10.4%
Montgomery	89,966	8.6%
Washington, D.C.	75,752	11.2%
Maryland	669,324	11.1%
United States	41,055,492	12.6%

Source: Lightcast

Figure 47 - Share of Population with Disabilities Heatmap, Prince George's County, 2023

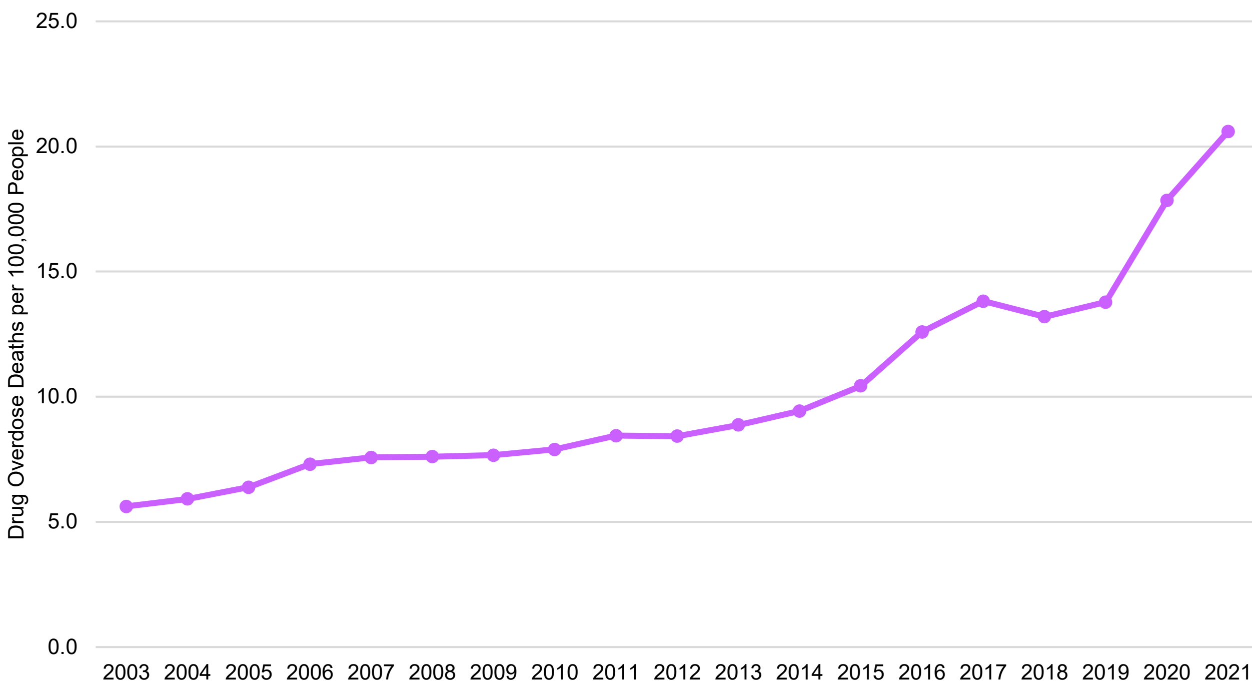


Source: Lightcast

Behavioral Health

Behavioral health plays a crucial role in the labor force, impacting factors such as worker productivity, workplace culture, resilience to stress, and overall safety, which can influence turnover rates. The pandemic has profoundly affected behavioral health nationwide, exacerbating challenges such as drug overdoses and mental health issues. In Prince George's County, drug overdose mortality rates have shown a marked increase over the last two decades, with a sharp rise occurring from 2020 onward, coinciding with the onset of the COVID-19 pandemic (Figure 48). Despite this worrying trend, the county still performs relatively well across behavioral health metrics compared to its neighboring areas, the state, and the United States overall (Table 18). This includes lower rates of binge drinking and comparable prevalence of poor mental health.

Figure 48 – Drug Overdose Mortality Rate Over Time, Prince George's County



Source: CDC

Table 18 - Behavioral Health Comparison, 2021

Region	Drug Overdose Mortality Rate	Percentage of adults reporting binge or heavy drinking (age-adjusted).	Estimated prevalence of mental health not good for >=14 days among adults aged 18 years and older (%)
Prince George's County	21	13%	13%
Anne Arundel County	49	18%	14%
Montgomery County	16	13%	12%
Washington, D.C.	50	24%	14%
Maryland	43	15%	12%
United States	27	18%	14%

Source: CDC, County Health Rankings & Roadmaps, KFF

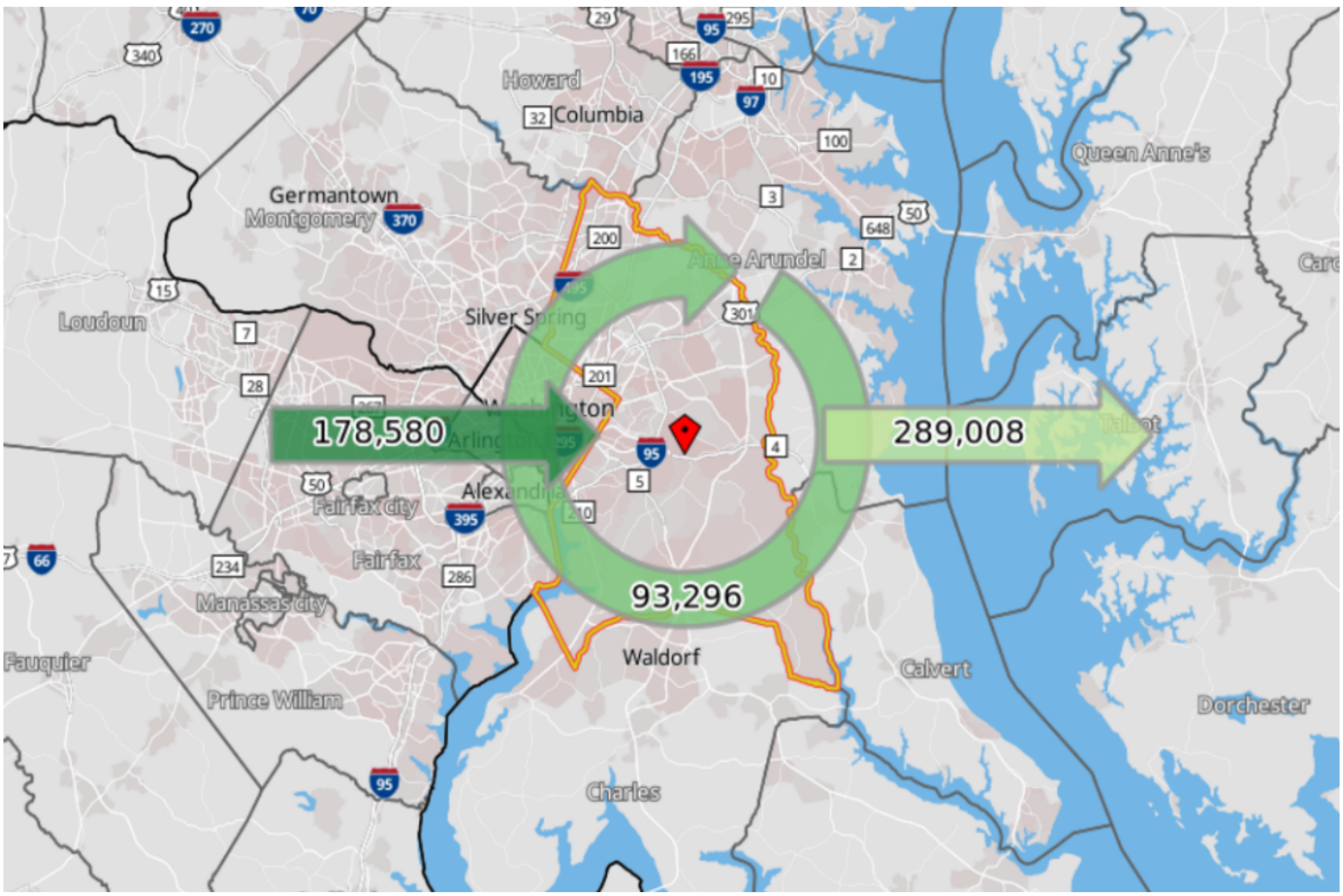
Mobility & Migration

The movement of people is a fundamental aspect of economic and labor market dynamics. Despite the increasing prevalence of remote work, much of the workforce still commutes to physical workplaces. Additionally, migration patterns often provide insights into regions experiencing job growth, higher standards of living, and overall economic expansion. Such movements not only reflect current economic conditions but also influence future development and labor market trends.

Commuting

Prince George's County is a net negative commuting destination, indicating that more residents commute out of the county for work than those from outside the county commute in. Approximately 76% of working residents (289,008 people) commute to work outside of Prince George's County (Figure 49). Conversely, over 65% of the jobs in Prince George's County are filled by people who live outside the county. This indicates that the county's labor shed extends well beyond its boundaries.

Figure 49 - Inflow and Outflow of Workers, Prince George's County, 2021



Source: US Census Bureau OnTheMap

The change in commuting distances between 2015 and 2021 reflects a shift towards more residents working closer to home, likely influenced by evolving employment opportunities and lifestyle preferences. As shown in Table 19, by 2021, a larger portion of the workforce—43.9%, up from 37.8% in 2015—resided within 10-24 miles of their workplace. Concurrently, there was a noticeable decrease in the number of residents commuting longer distances, specifically those traveling 25-50 miles and over 50 miles.

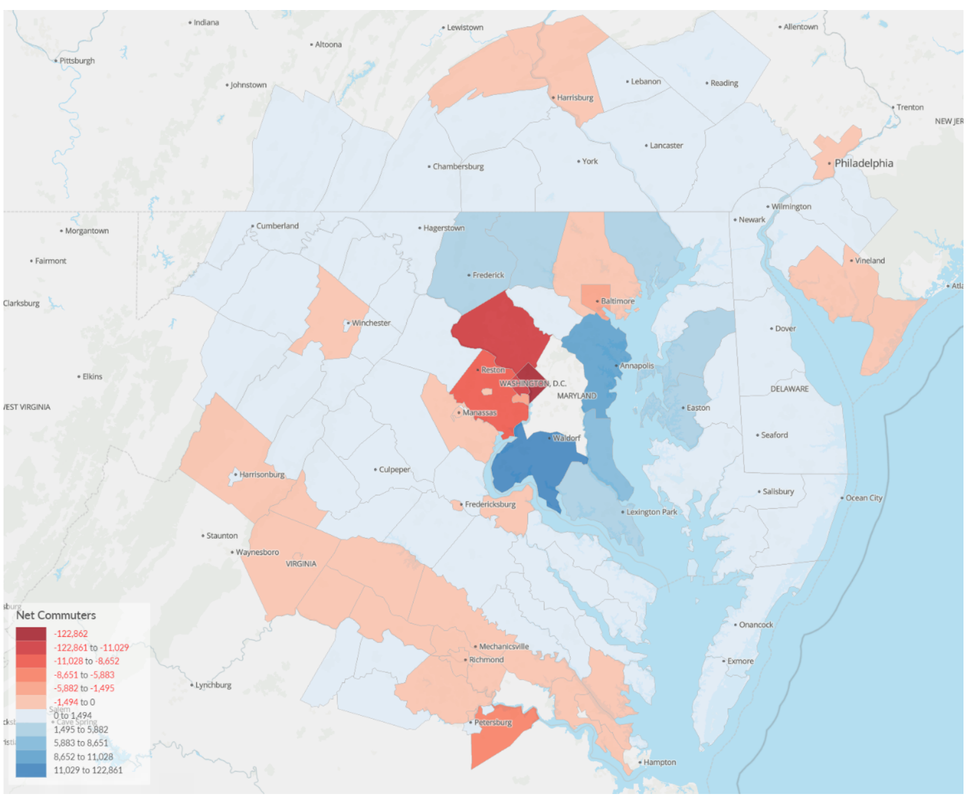
Table 19 – Commuting Distance, Prince George's County Residents

	2015		2021	
	Job Count	**Share**	**Job Count**	**Share**
Total All Jobs	307,498	100.0%	382,304	100.0%
Less than 10 miles	121,714	39.6%	154,562	40.4%
10-24 miles	116,313	37.8%	167,845	43.9%
25-50 miles	47,551	15.5%	44,166	11.6%
Greater than 50 miles	21,920	7.1%	15,731	4.1%

Source: US Census Bureau OnTheMap

Most inbound commuters to Prince George's County originate from Anne Arundel and Montgomery counties, whereas most outbound commuters travel to Washington, D.C. Overall, Prince George's County has a net commuting deficit with Washington, D.C., Montgomery County, and Northern Virginia, but maintains a net positive commuting relationship with Anne Arundel and Charles counties, as depicted in Figure 50. Specifically, only three areas within Prince George's County—Andrew's Air Force Base, Beltsville, and College Park (the latter being home to the university)—record net positive commuter inflows, as shown in Table 20. This data highlights the regional dynamics and interdependencies that characterize commuter traffic patterns in and around Prince George's County.

Figure 50 – Map of Net Commuter Flows with Prince George's County, 2023



Source: Lightcast

Table 20 – Net Commuters by Neighborhood, Prince George's County, 2023

ZIP Code Name	Jobs	Resident Workers	Net Commuters
College Park	30,232	13,664	16,568
Beltsville	22,045	15,516	6,529
Andrew's Air Force Base	3,522	1,597	1,925
Southern MD Facility	-	-	-
Aquasco	601	832	(231)
Cheltenham	576	1,786	(1,210)
Brentwood	1,940	3,653	(1,713)
Glenn Dale	1,765	3,607	(1,842)
Greenbelt	12,710	14,934	(2,224)
Bladensburg	2,838	5,536	(2,698)
Oxon Hill	12,472	15,429	(2,957)
Mount Rainier	1,728	4,713	(2,985)
Lanham	19,198	22,597	(3,399)
Brandywine	5,045	8,503	(3,458)
Accokeek	2,845	7,527	(4,682)
Clinton	16,987	21,852	(4,865)
Riverdale	4,278	9,608	(5,330)
Capitol Heights	15,062	21,542	(6,480)
Laurel	26,444	34,580	(8,136)
Suitland	7,841	16,183	(8,342)
Upper Marlboro	46,713	56,267	(9,554)
District Heights	11,808	21,429	(9,621)
Temple Hills	11,374	21,850	(10,476)
Fort Washington	14,642	29,397	(14,755)
Bowie	39,152	60,386	(21,234)
Hyattsville	58,182	82,659	(24,477)

Source: Lightcast

To analyze occupational commuting patterns, Lightcast utilizes the Longitudinal Employer-Household Dynamics (LEHD) Origin-Destination Employment Statistics (LODES) from the U.S. Census Bureau. This analysis reveals that at the occupation group level, only the Education and Construction sectors experience net positive commuting into Prince George's County, as illustrated in Figure 51. Conversely, there is a significant net outflow of workers in Management and Business & Financial Operations, indicating that a vast number of these professionals commute out of the county for work.

Figure 51 – Net Commuters by Occupation Group, Prince George's County, 2023

Source: Lightcast

Detailed occupation insights are provided in Table 21, which shows the commuting patterns for the top ten inbound and outbound occupations. Business Operations Specialists, Lawyers, and General Managers have the highest net negative commuting totals. Conversely, Teaching Assistants, Postsecondary Teachers, and Light Truck Drivers are the top three occupations with net positive commuting into Prince George's County, reflecting a stronger presence of these jobs within the county.

Table 21 - Top 10 Occupations of Inbound and Outbound Commuters for Prince George's County, 2023

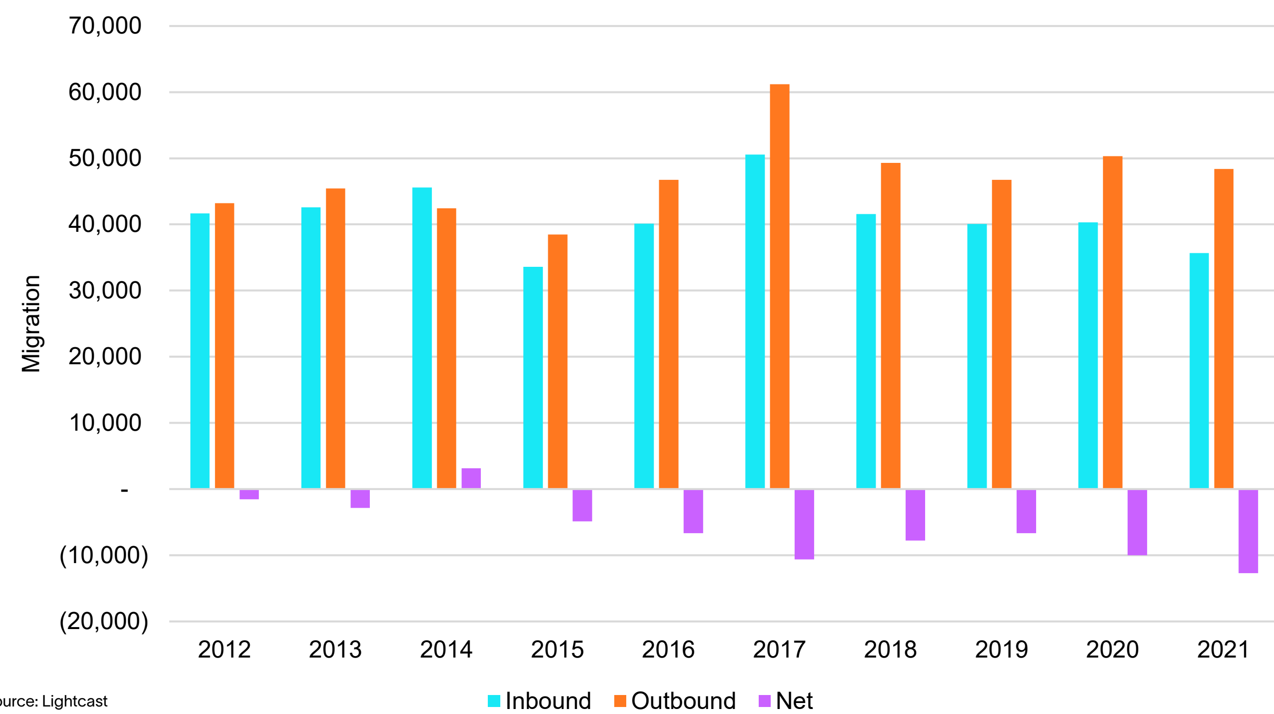
SOC	Description	Jobs	Resident Workers	Net Commuters	Median Hourly Earnings
Top 10 Leaving					
13-1199	Business Operations Specialists, All Other	5,768	12,209	-6,441	$46.64
23-1011	Lawyers	1,720	7,144	-5,423	$69.94
11-1021	General and Operations Managers	9,471	14,515	-5,044	$53.65
31-1128	Home Health and Personal Care Aides	3,216	7,906	-4,689	$16.84
13-1111	Management Analysts	2,874	7,556	-4,681	$49.88
55-9999	Military-only occupations	4,080	8,481	-4,401	$23.03
29-1141	Registered Nurses	4,120	8,108	-3,988	$37.11
11-9199	Managers, All Other	4,203	7,921	-3,718	$55.49
33-9032	Security Guards	3,671	7,074	-3,403	$19.63
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	6,021	9,253	-3,232	$16.20
Top 10 Entering					
25-9044	Teaching Assistants, Postsecondary	3,175	1,294	1,881	$27.27
25-1099	Postsecondary Teachers	5,826	4,633	1,193	$40.25
53-3033	Light Truck Drivers	4,734	3,639	1,095	$22.17
25-2021	Elementary School Teachers, Except Special Education	4,498	3,546	953	$32.64
29-1299	Healthcare Diagnosing or Treating Practitioners, All Other	1,925	1,235	690	$69.72
53-3032	Heavy and Tractor-Trailer Truck Drivers	4,463	3,793	671	$25.84
53-3052	Bus Drivers, Transit and Intercity	1,583	992	591	$24.59
47-2152	Plumbers, Pipefitters, and Steamfitters	2,130	1,588	542	$32.17
49-9021	Heating, Air Conditioning, and Refrigeration Mechanics and Installers	1,791	1,301	490	$30.60
39-3091	Amusement and Recreation Attendants	1,430	1,027	403	$12.56

Source: Lightcast

Migration

Prince George's County is experiencing a net negative migration trend, meaning more people leave the county each year than those who move to it. This trend is intensifying; in 2012, the county saw a net loss of 1,543 people due to migration, but by 2021, this number had escalated to 12,704, as shown in Figure 52. From a regional perspective, the county does experience some positive net migration, primarily from Washington, D.C. proper and the New York City Metropolitan Statistical Area (MSA), specifically from Kings County, Queens County, and the Bronx, detailed in Table 22. The most significant outflows of net migration are to nearby areas such as the D.C. suburbs, Annapolis, and Baltimore.

Figure 52 - Net Migration Trends, Prince George's County, 2012-2021



Source: Lightcast

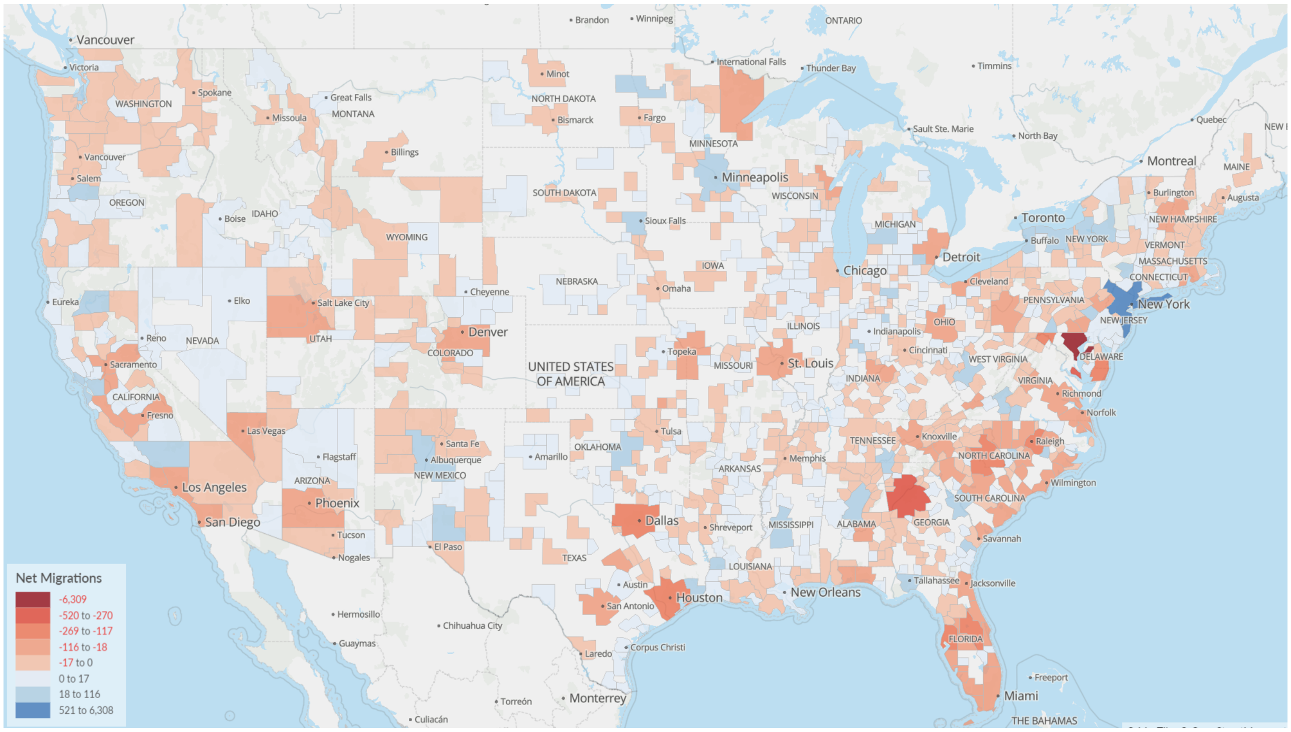
Table 22 - Top Counties of Net Inbound and Outbound Migrations for Prince George's County, 2021

County	Inbound	Outbound	Net
Net Positive			
Washington, D.C.	7,786	4,656	3,130
Kings County, NY	300	116	185
Queens County, NY	174	84	90
Bronx, NY	128	76	52
Bernalilo County, NM	43	-	42
Net Negative			
Anne Arundel County, MD	2,348	5,644	(3,297)
Charles County, MD	1,979	4,482	(2,503)
Howard County, MD	1,277	2,780	(1,503)
Montgomery County, MD	5,773	6,685	(912)
Baltimore City County, MD	603	1,306	(703)

Source: Lightcast

On a national scale, there are only two large MSAs with which Prince George's County has positive net migration flows: New York City and Minneapolis. Major destinations of former residents include Atlanta, Houston, and Dallas (Figure 53).

Figure 53 – Map of Net Migration to/from Prince George's County by MSA, 2021



Source: Lightcast

According to Lightcast's Talent Attraction Scorecard methodology, Prince George's County ranks 596th out of 616 large population counties (Table 23). Despite this low ranking, it should be noted that most other areas in the metro rank poorly, except for Loudoun County (87th). While the county ranks well in educational attainment, its performance is weighed down by its rankings in job growth, job openings, competitive effect[15], and migration.

Table 23 – Talent Attraction Scorecard, 2023 – Large County Rankings

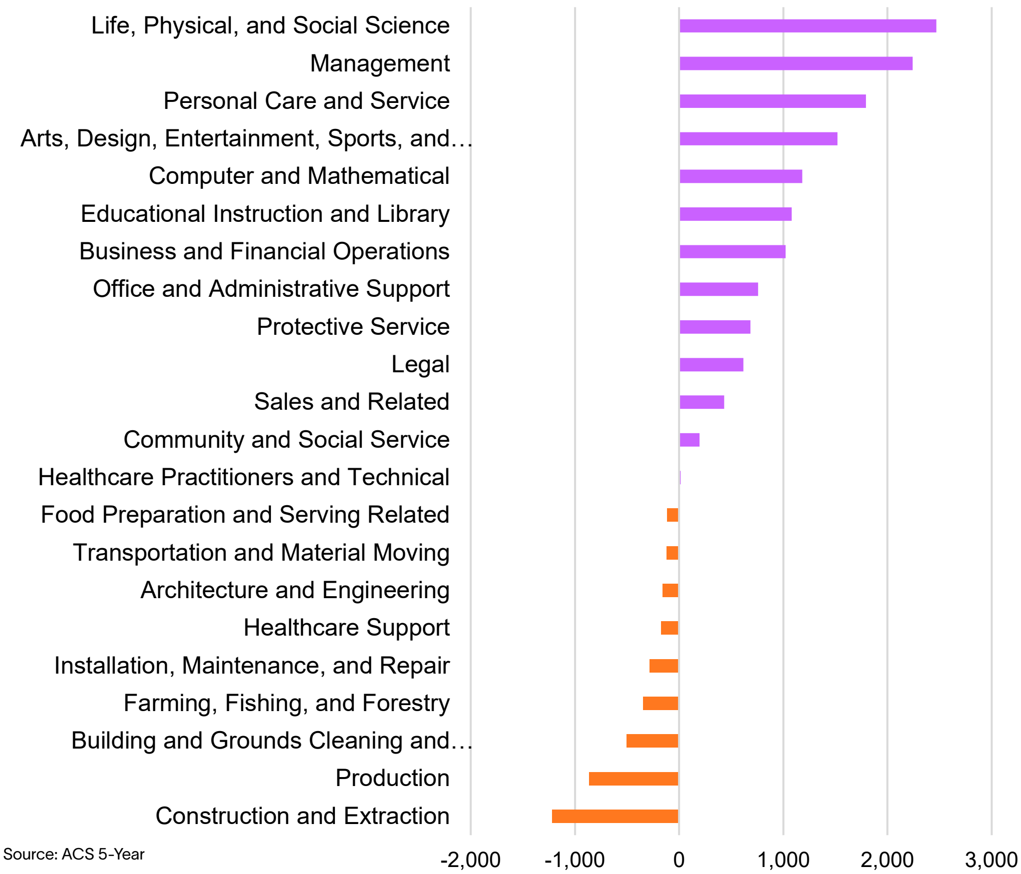
	Ranking (Out of 616)	Education Attainment	Job Growth	Skilled Job Growth	Job Open-ings	Competitive Effect	Migration
Prince George's County, Maryland	596	129	528	518	475	583	592
Anne Arundel County, Maryland	472	432	415	370	246	533	380
Montgomery County, Maryland	597	577	521	487	166	606	585
Washington, D.C.	599	612	488	426	2	614	594
Arlington County, Virginia	458	609	481	305	6	435	572
Alexandria, Virginia	559	592	605	597	49	541	539

Source: Lightcast

Reliable data on migration by occupation is available at the MSA level. The Washington-Arlington-Alexandria, DC-MA-VA-WV MSA (henceforth the Washington DC MSA) receives Science, Management, and Personal Care & Service occupations from migration, while losing Construction and Production occupations to migration (Figure 54). The top positive migration occupations are Managers, Childcare Workers, Economists, Secretaries, and Science Technicians. The top negative migration occupations are Registered Nurses (RNs), Sales Workers, Project Management Specialists, Painters, and Purchasing Agents (Table 24).

15 Competitive effect indicates how much of the job change within a given region is the result of some unique competitive advantage of the region.

Figure 54 – Net Migrations by Occupation Group, Washington DC MSA



Source: ACS 5-Year

Table 24 – Net Migrations by Occupation, Washington DC MSA

Occupation	Inbound	Outbound	Net
Net Positive			
Managers, All Other	6,550	4,750	1,800
Childcare Workers	2,598	1,225	1,373
Economists	976	151	825
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	2,179	1,463	716
Life, Physical, and Social Science Technicians, All Other	946	323	623
Net Negative			
Registered Nurses	2,172	2,722	(550)
Sales and Related Workers, All Other	137	675	(538)
Project Management Specialists	918	1,379	(461)
Painters, Construction and Maintenance	120	538	(418)
Buyers and Purchasing Agents	201	586	(385)

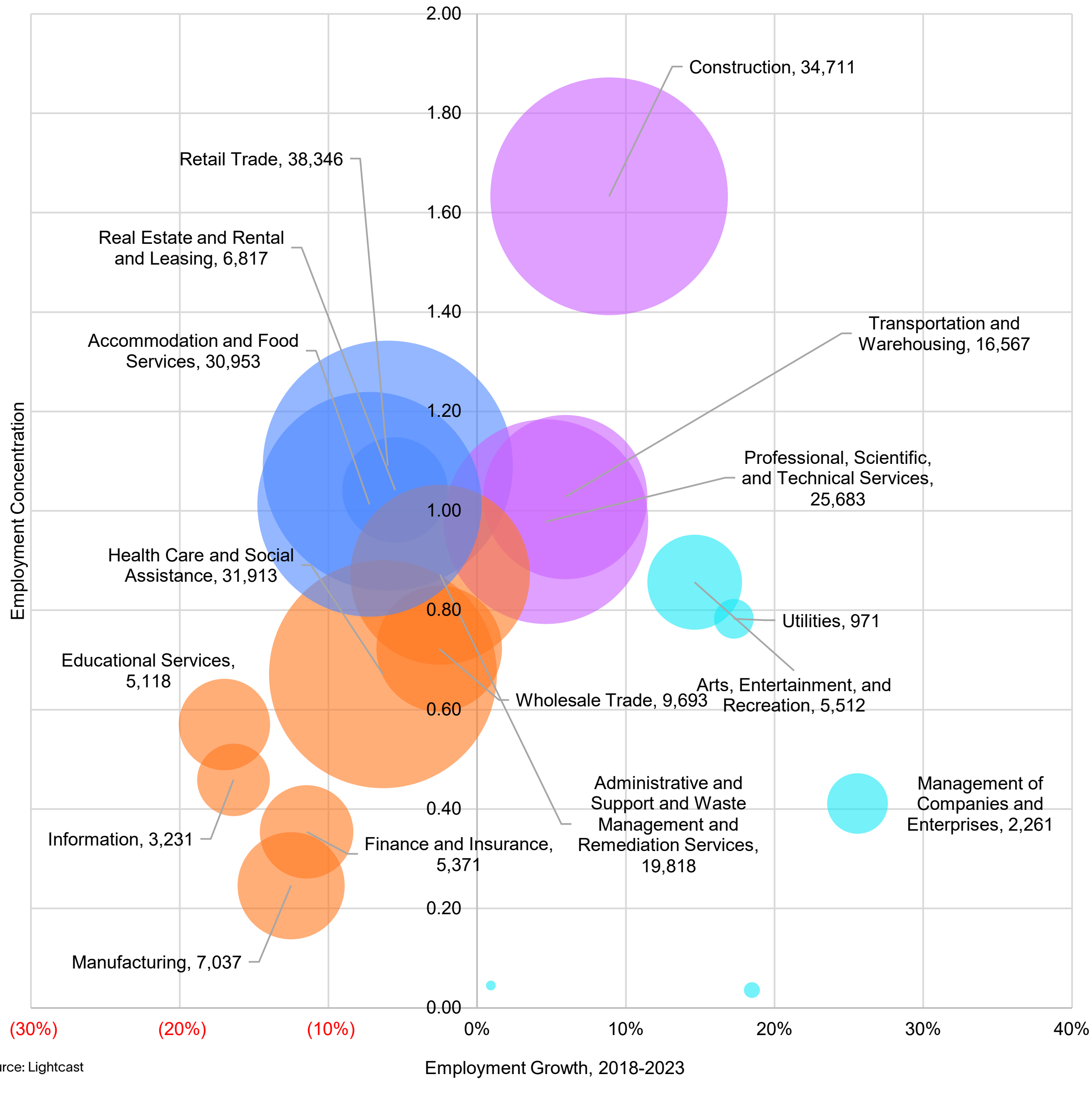
Source: ACS 5-Year

Business & Industry Trends

Overview

Prince George's County has several large industries that provide employment opportunities to the local workforce. Government is by far the largest industry in the county, employing over 109,000 people with a concentration more than two times the national average (Figure 55). Construction, Retail, Health Care, and Accommodation & Food Services are also major employment categories. The industries with the strongest percentage growth between 2018 and 2023 are small by size comparison.

Figure 55 - Industry (NAICS 2) Performance, Prince George's County



Source: Lightcast

Government accounts for 33.2% of gross regional product (GRP) and nearly 30% of the county's employment (see Table 25). The next largest industry by employment is Retail Trade, employing over 38,000 people in 2023 and contributing 7.7% of Prince George's County GRP. Government employment is notably concentrated, exceeding the national average by a factor of 2.07. Similarly, the Construction industry shows local concentration, standing at 1.63 times the national average.

Higher concentrations can point to a more specialized local economy, which reflects both advantages (focused expertise, competitive advantage) and risks (vulnerability to industry-specific downturns). Conversely, industries such as Mining, Quarrying, and Oil and Gas Extraction (0.04), Agriculture, Forestry, Fishing, and Hunting (0.04), Manufacturing (0.25), Finance & Insurance (0.35), Management of Companies & Enterprises (0.41), and Information (0.46) demonstrate notably low concentrations in Prince George's County, indicating their relatively smaller importance within the local economy compared to the national average.

Government is also the largest industry in the Washington DC MSA, although employment is less concentrated at the regional/MSA level (1.59) compared to the county (2.07). The Professional, Scientific, and Technical Services industry is highly concentrated in the MSA (2.18), providing 15.5% of regional employment and nearly 20% of the region's gross regional product. Construction, an industry that accounts for over 9% of employment and GRP in Prince George's County, is less significant at the regional level – contributing a share of only 4.1% of GRP and 5.4% of employment.

Table 25 - Prince George's County Employment and Gross Regional Product by Industry

2-digit NAICS Industry	2023 Jobs	2023 Employment Concentration	% of Employment	2022 GRP	% of GRP
Government	109,564	2.07	29.6%	$15,716,979,883	33.2%
Retail Trade	38,346	1.09	10.4%	$3,655,391,013	7.7%
Construction	34,711	1.63	9.4%	$4,351,697,363	9.2%
Health Care and Social Assistance	31,913	0.67	8.6%	$3,105,707,446	6.6%
Accommodation and Food Services	30,953	1.01	8.4%	$2,149,732,962	4.5%
Professional, Scientific, and Technical Services	25,683	0.98	6.9%	$4,309,285,438	9.1%
Administrative and Support and Waste Management and Remediation Services	19,818	0.87	5.4%	$1,681,822,235	3.6%
Transportation and Warehousing	16,567	1.03	4.5%	$1,443,371,701	3.0%
Other Services (except Public Administration)	16,220	0.89	4.4%	$1,142,214,810	2.4%
Wholesale Trade	9,693	0.72	2.6%	$2,027,043,335	4.3%
Manufacturing	7,037	0.25	1.9%	$1,106,199,475	2.3%
Real Estate and Rental and Leasing	6,817	1.04	1.8%	$1,861,969,700	3.9%
Arts, Entertainment, and Recreation	5,512	0.86	1.5%	$305,862,483	0.6%
Finance and Insurance	5,371	0.35	1.5%	$1,816,796,400	3.8%
Educational Services	5,118	0.57	1.4%	$416,027,369	0.9%
Information	3,231	0.46	0.9%	$1,297,668,822	2.7%
Management of Companies and Enterprises	2,261	0.41	0.6%	$349,609,995	0.7%
Utilities	971	0.78	0.3%	$581,633,238	1.2%
Agriculture, Forestry, Fishing and Hunting	155	0.04	0.0%	$20,694,921	0.0%
Mining, Quarrying, and Oil and Gas Extraction	58	0.04	0.0%	$45,070,860	0.1%
	369,999			$47,339,708,589	

Source: Lightcast

Retail, Manufacturing, Educational Services, Health Care, and Accommodation & Food Services have shed thousands of jobs, while Construction, Government, and Professional, Scientific, & Technical Services have essentially made up the difference. Despite the lack of job growth between 2018 and 2023, Prince George's County has added 1,490 payrolled business locations, up 9% since 2018 (Table 26).

Table 26 – Business Trends in Prince George's County, 2018-2023

NAICS	Description	2018 - 2023 Job Change	2023 Employment Concentration	Competitive Effect	2018 Payrolled Business Locations	2023 Payrolled Business Locations	Growth in Payrolled Business Locations	% Growth in Payroll Business Locations
11	Agriculture, Forestry, Fishing and Hunting	24	0.04	25	16	24	8	50%
21	Mining, Quarrying, and Oil and Gas Extraction	1	0.04	8	3	3	0	0%
22	Utilities	143	0.78	122	20	31	11	55%
23	Construction	2,831	1.63	439	1,764	1,908	144	8%
31	Manufacturing	-1,006	0.25	-1,184	338	335	-3	-1%
42	Wholesale Trade	-254	0.72	-565	598	582	-16	-3%
44	Retail Trade	-2,450	1.09	-1,854	2,358	2,262	-96	
48	Transportation and Warehousing	928	1.03	-2,504	489	591	102	21%
51	Information	-633	0.46	-993	151	292	141	93%
52	Finance and Insurance	-696	0.35	-1,122	617	655	38	6%
53	Real Estate and Rental and Leasing	-398	1.04	-987	690	717	27	4%
54	Professional, Scientific, and Technical Services	1,137	0.98	-2,324	2,124	2,623	499	23%
55	Management of Companies and Enterprises	461	0.41	313	41	99	58	141%
56	Administrative and Support and Waste Management and Remediation Services	-504	0.87	-976	1,106	1,203	97	9%
61	Educational Services	-1,048	0.57	-1,051	260	301	41	16%
62	Health Care and Social Assistance	-2,160	0.67	-4,018	2,082	2,218	136	7%
71	Arts, Entertainment, and Recreation	704	0.86	559	183	211	28	15%
72	Accommodation and Food Services	-2,415	1.01	-2,322	1,443	1,477	34	2%
81	Other Services (except Public Administration)	-1,412	0.89	-565	1,516	1,729	213	14%
90	Government	5,769	2.07	6,162	427	459	32	7%
	TOTAL	-981		-12,841	16,229	17,719	1,490	9%

Source: Lightcast

The University of Maryland is the county's largest employer and a valuable one at that – with a large postsecondary education institution close by, the county can benefit from a strong pipeline of highly skilled talent. Toshiba, Johns Hopkins University Applied Physics Laboratory, Prince George's Community College, and Prince George's Hospital Center are the next largest employers. Several Amazon facilities are also present in Prince George's County, providing a sizable share of the area's jobs in transportation and logistics (Table 27).

Table 27 – Largest Employers in Prince George's County

Business Name	Location	Estimated Size	Industry Name
University Of Maryland	College Park	9,452	Colleges, Universities, and Professional Schools
Toshiba	Beltsville	6,600	Semiconductor and Related Device Manufacturing
Johns Hopkins University Applied Physics Laboratory	Laurel	4,062	Colleges, Universities, and Professional Schools
Prince George's Community College	Upper Marlboro	2,179	Junior Colleges
Prince George's Hospital Center	Hyattsville	1,608	General Medical and Surgical Hospitals
Malcolm Grow Medical Clinic	Andrews Air Force Base	1,600	Offices of Physicians (except Mental Health Specialists)
Army Research Laboratory	Hyattsville	1,417	Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)
Amazon Last Mile Delivery Station For Small Packages	Hyattsville	1,100	Other Miscellaneous Durable Goods Merchant Wholesalers
Amazon Last Mile Delivery Station For Small Packages	Lanham	1,100	Other Miscellaneous Durable Goods Merchant Wholesalers
Amazon Last Mile Delivery Station For Small Packages	Upper Marlboro	1,100	Other Miscellaneous Durable Goods Merchant Wholesalers
Amazon Last Mile Delivery Station For Small Packages	Beltsville	1,100	Other Miscellaneous Durable Goods Merchant Wholesalers
Prince George's County Public Schools	Upper Marlboro	986	Elementary and Secondary Schools
National Institutes Of Health	Fort Washington	983	Offices of Physicians (except Mental Health Specialists)
Facilities Management	College Park	950	Colleges, Universities, and Professional Schools
Washington Suburban Sanitary Commission	Laurel	888	Other Nonhazardous Waste Treatment and Disposal

Source: Lightcast, DatabaseUSA

Occupations

When examining employment in Prince George's County by occupation group, Sales provides the largest number of jobs to the area followed by Office and Administrative Support positions (Table 28). Despite being the largest occupation group, Sales has not shown robust growth compared to Office and Administrative Support and Management occupations (14% and 35%, respectively). Reflecting industry trends, the Educational Instruction and Library and Production occupation groups have contracted sharply (-10% and -14%, respectively).

Given the presence of Andrews Air Force Base, Military occupations are highly concentrated. The county also has strong concentrations in Life, Physical, and Social Science occupations, Computer and Mathematical occupations, Personal Care and Service occupations, and Educational Instruction and Library occupations.

Table 28 - Top Occupation Groups, Prince George's County

SOC	Description	2018 Jobs	2023 Jobs	2018 - 2023 Change	2018 - 2023 % Change	2023 Employment Concentration
41-0000	Sales and Related Occupations	54,129	54,549	420	1%	0.91
43-0000	Office and Administrative Support Occupations	47,365	53,911	6,546	14%	0.99
11-0000	Management Occupations	35,543	48,097	12,554	35%	1.05
53-0000	Transportation and Material Moving Occupations	46,657	46,199	-458	-1%	1.11
13-0000	Business and Financial Operations Occupations	30,062	40,375	10,313	34%	1.01
25-0000	Educational Instruction and Library Occupations	34,173	30,713	-3,460	-10%	1.27
47-0000	Construction and Extraction Occupations	28,412	28,880	468	2%	1.3
35-0000	Food Preparation and Serving Related Occupations	27,642	27,498	-144	-1%	0.85
39-0000	Personal Care and Service Occupations	22,648	21,424	-1,224	-5%	1.26
29-0000	Healthcare Practitioners and Technical Occupations	19,450	20,000	550	3%	0.8
37-0000	Building and Grounds Cleaning and Maintenance Occupations	19,129	19,000	-129	-1%	1.08
49-0000	Installation, Maintenance, and Repair Occupations	17,841	18,425	585	3%	1.02
15-0000	Computer and Mathematical Occupations	15,918	17,157	1,240	8%	1.23
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	16,155	17,057	902	6%	1.08
31-0000	Healthcare Support Occupations	14,639	14,600	-40	0%	0.73
33-0000	Protective Service Occupations	11,018	11,647	629	6%	1.3
21-0000	Community and Social Service Occupations	8,057	8,246	189	2%	1.08
19-0000	Life, Physical, and Social Science Occupations	8,014	8,165	151	2%	1.78
51-0000	Production Occupations	9,485	8,126	-1,358	-14%	0.35
17-0000	Architecture and Engineering Occupations	7,018	6,472	-546	-8%	0.92
55-0000	Military-only occupations	3,545	4,080	535	15%	1.78
23-0000	Legal Occupations	3,244	3,581	337	10%	0.88
99-0000	Unclassified Occupation	1,180	1,526	346	29%	1.25
45-0000	Farming, Fishing, and Forestry Occupations	432	434	2	0%	0.13
		481,756	510,163	28,407	6%	

Source: Lightcast

Figure 56 - Occupation Group Job Growth, Prince George's County, 2018-2023

Source: Lightcast

Retail Salespersons are the largest single occupation in Prince George's County (Table 29). Cashiers and Taxi Drivers were once the second and third largest occupations in the county but have since been replaced after contracting sharply. Cashier employment has likely been affected by the pandemic as retailers adapted to more contactless kiosks. Couriers and Messengers employment has exploded from 1,719 jobs in 2018 to 11,769 in 2023 – likely due to increased e-commerce and the expansion of same day delivery services, such as Uber Eats, DoorDash, and Instacart. Also of note is that the employment of Business Operations Specialists doubled during the same period.

Table 29 - Top 25 Occupations by Employment, Prince George's County

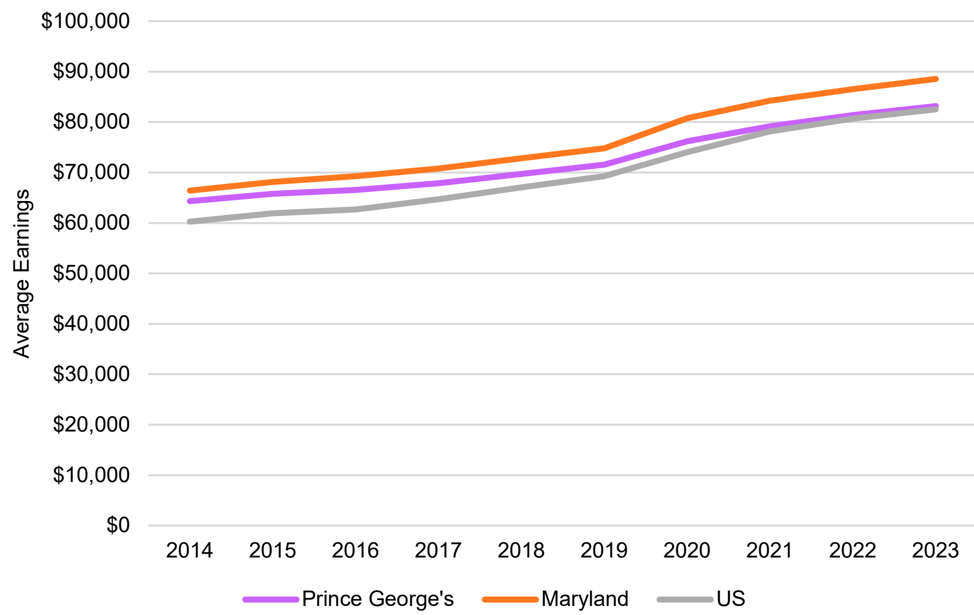
SOC	Description	2018 Jobs	2023 Jobs	2018 - 2023 % Change	Median Hourly Earnings
41-2031	Retail Salespersons	11,962	12,718	6%	$13.98
43-5021	Couriers and Messengers	1,719	11,769	585%	$10.71
11-1021	General and Operations Managers	6,652	9,825	48%	$52.61
11-9199	Managers, All Other	6,592	9,319	41%	$30.39
53-3054	Taxi Drivers	10,771	9,169	-15%	$11.77
41-2011	Cashiers	11,801	9,128	-23%	$12.61
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	8,412	8,310	-1%	$15.62
35-3023	Fast Food and Counter Workers	8,747	8,019	-8%	$13.97
41-9022	Real Estate Sales Agents	7,204	7,991	11%	$28.55
41-1011	First-Line Supervisors of Retail Sales Workers	6,688	7,720	15%	$18.01
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	8,233	7,333	-11%	$21.14
31-1128	Home Health and Personal Care Aides	6,372	7,050	11%	$16.48
53-3033	Light Truck Drivers	4,584	7,041	54%	$20.95
13-1199	Business Operations Specialists, All Other	3,037	6,208	104%	$45.48
25-1099	Postsecondary Teachers	6,303	6,077	-4%	$39.88
11-9141	Property, Real Estate, and Community Association Managers	3,890	6,066	56%	$25.25
53-3032	Heavy and Tractor-Trailer Truck Drivers	4,874	6,002	23%	$25.20
53-7065	Stockers and Order Fillers	5,215	5,833	12%	$16.65
47-2061	Construction Laborers	5,256	5,725	9%	$20.38
43-4051	Customer Service Representatives	5,089	5,116	1%	$18.98
13-1111	Management Analysts	4,645	5,006	8%	$46.29
13-2052	Personal Financial Advisors	2,617	4,719	80%	$39.89
39-5012	Hairdressers, Hairstylists, and Cosmetologists	3,985	4,634	16%	$13.89
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	5,770	4,604	-20%	$16.53
25-2021	Elementary School Teachers, Except Special Education	4,811	4,570	-5%	$32.53

Source: Lightcast

Wages

In the context of a tight labor market, as indicated by the low unemployment rate, one might expect rising income levels, particularly in nominal terms, which are compounded by high inflation rates. As illustrated in Figure 57, prior to 2020, earnings in Prince George's County increased modestly and accelerated slightly that year, but not at the pace observed nationally. Since then, the earnings gap between Prince George's County and the state of Maryland has widened, with the county's average earnings reported at $83,142 compared to Maryland's $88,556.

Figure 57 - Average Earnings Trends, 2014-2023

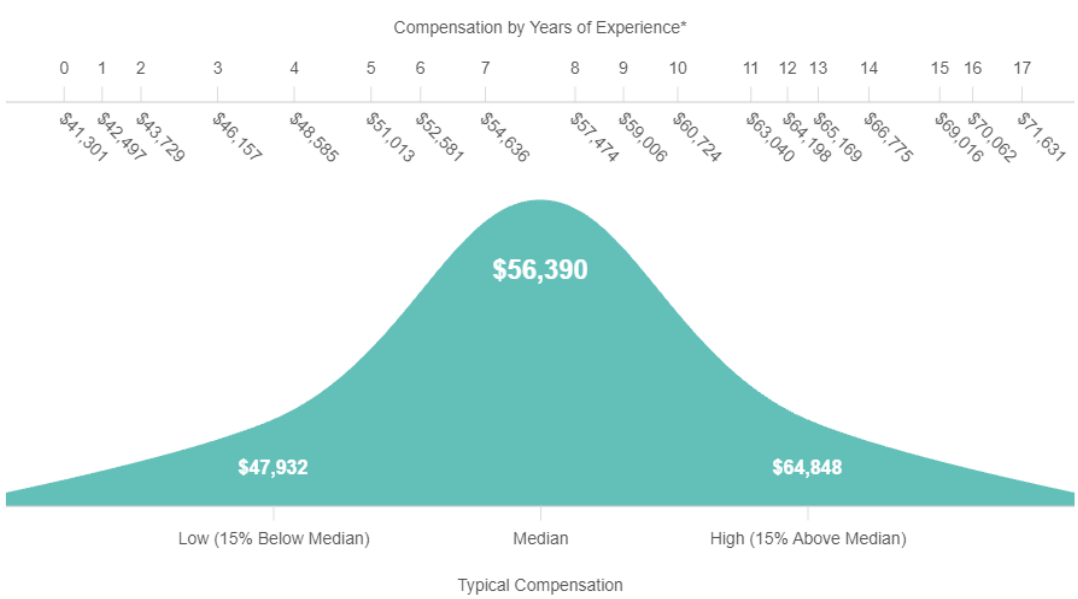


Source: Lightcast

The median wage in Prince George's County stands at $56,390 per year, which is 16.7% higher than the national average, with typical compensation ranging between $47,932 and $64,849 (Figure 58). Compensation varies significantly with experience; entry-level workers with no experience typically earn around $41,301, which rises to a median wage of $60,724 after a decade of experience.

Despite higher nominal wages relative to the national average, the cost-of-living adjustment paints a different picture. Adjusted for the local cost-of-living, which is 26.1% above the national average, workers in Prince George's County have an adjusted income comparable to $44,718, as shown in Table 30. This adjustment highlights the disparity between nominal earnings and the actual purchasing power of wages in the area.

Figure 58 - Median Compensation by Years of Experience, Prince George's County, 2023



Source: Lightcast

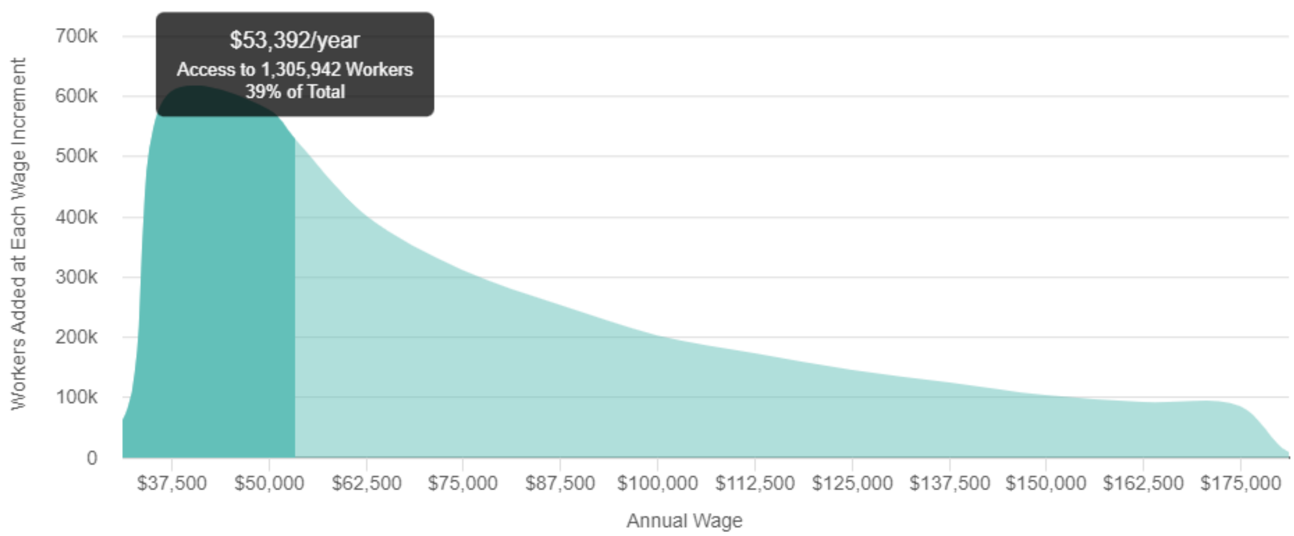
Table 30 - Cost of Living Adjusted Wages, Prince George's County, 2023

Region	10th Pct.	25th Pct.	50th Pct. (Median)	75th Pct.	90th Pct.
Prince George's County	$30,279	$38,227	$56,390	$89,982	$135,928
Nation	$29,128	$25,658	$48,311	$75,230	$116,971
COL Adjusted Prince George's County	$24,012	$30,315	$44,718	$71,358	$107,794

Source: Lightcast

At a median annual rate of $53,392, there are 163,884 workers available within Prince George's County. However, because the median rate is higher for the MSA ($66,427), only 40% of the MSA's labor force – or 1.3 million people – could be captured at the county's median rate. This could make it more difficult for Prince George's County employers to compete for talent against neighboring areas (Figure 59).

Figure 59 - Talent Supply by Compensation, Washington DC MSA at Prince George's County Median Wage (2023)

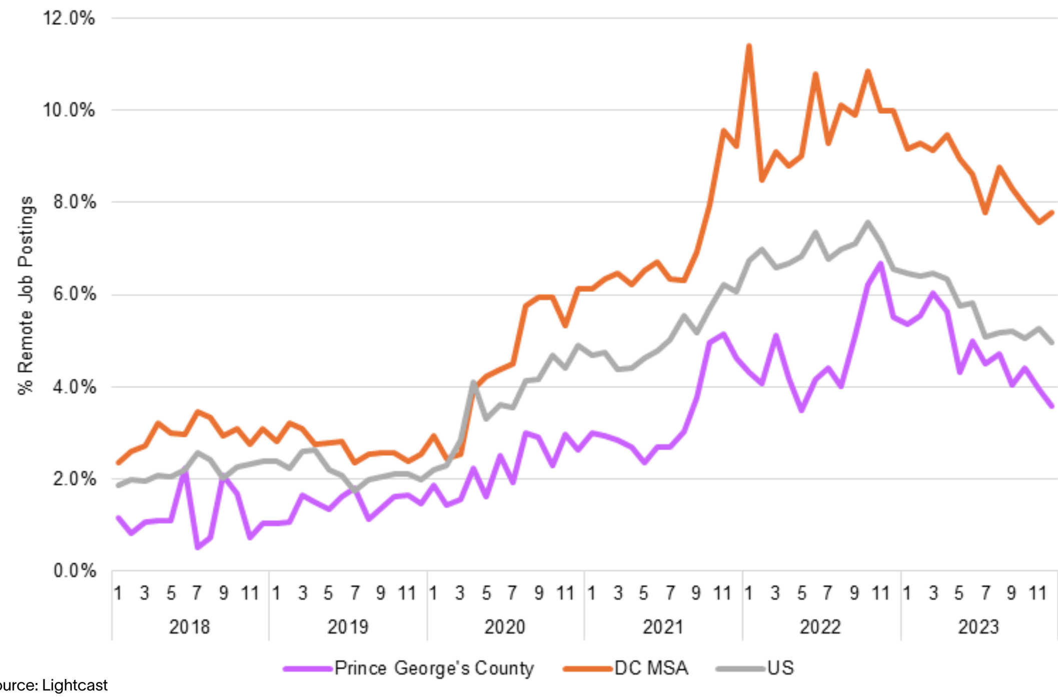


Source: Lightcast

Remote Work

The pandemic has changed the way people approach work by forcing companies to adapt to remote work. With employees having greater leverage in the labor market, remote work appears to be a permanent feature of the economy. While remote work job postings are not as frequent in Prince George's County compared to the Washington, D.C. MSA or the nation, remote postings are double what they were prior to the pandemic (Figure 60). Before 2020, remote postings accounted for less than 2% of all job postings. Since then, remote postings have grown tremendously. Despite peaking in 2022 and declining somewhat since then, remote work still accounts for 3.6% of total postings in the county.

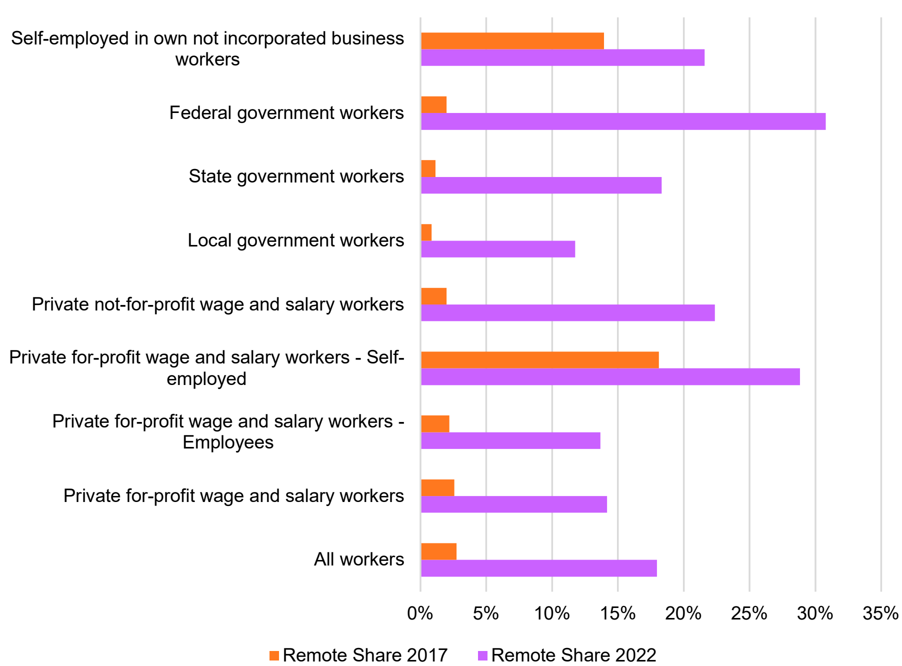
Figure 60 – Remote Share of Job Postings, 2018-2023



Source: Lightcast

Using ACS data, we can compare the remote share of workers by types of workers. In 2017, remote work did not feature heavily for government or private sector employees but was significant for the self-employed (Figure 61). By 2022, this had changed greatly: the minimum share of remote workers was 12% (local government workers), with drastic increases in remote employees in both the public and private sectors, particularly for federal government workers (a growth from 2% to 31%).

Figure 61 – Remote Share of Workers by Type, 2017-2022



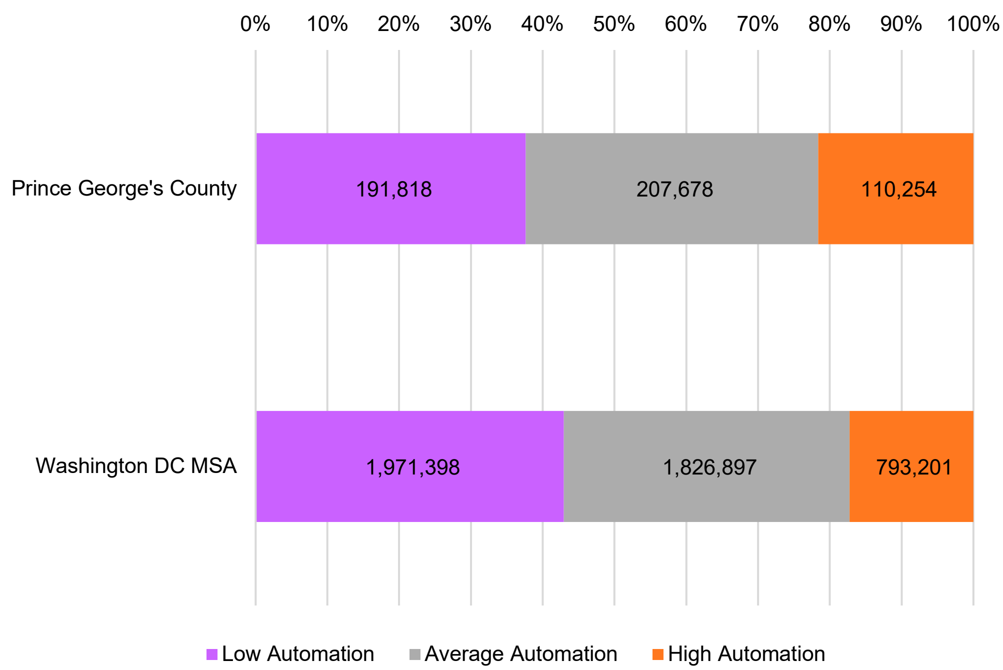
Source: ACS 5-Year

Automation & Artificial Intelligence

Automation and artificial intelligence (AI) are at the forefront of everyone's minds due to the potential for widespread disruption to labor market dynamics. Will millions of workers be replaced? Or will new types of occupations emerge because of this innovation, changing the nature of skills needed for the labor market? While those questions are outside the purview of this study, we do examine how the occupations in Prince George's County are potentially exposed to automation and AI.

Lightcast utilizes an automation index which captures an occupation's risk of being affected by automation. An automation index greater than 100 indicates a higher-than-average risk of automation while an automation index less than 100 indicates a lower-than-average risk of automation.[16] By observing the employment in each occupation, we can see if the county has a high exposure to high automation index occupations.[17] Based on this assessment, roughly 22% of Prince George's County jobs are classified as high automation risk compared to 17% of jobs in the Washington DC MSA (Figure 62).

Figure 62 - Employment Share of Exposure to Automation, 2023



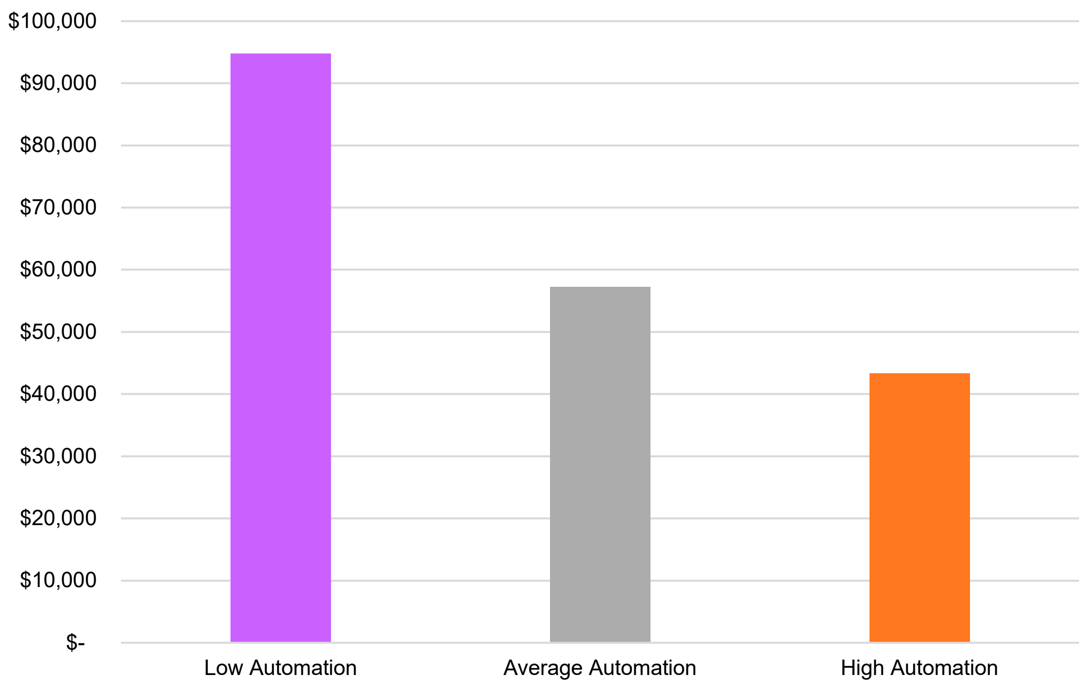
Source: Lightcast

High automation index scores are associated with lower wage occupations (Figure 63). This is because automation technologies are currently more feasible and cost-effective for tasks that are repetitive and predictable. These are more commonly characteristics of lower-wage, lower-skilled jobs. Indeed, when analyzing the distribution of automation index scores by education level, occupations requiring less education (and therefore less skill) have higher exposure to automation (Figure 64).

16 For more information on the index's methodology, visit our Knowledge Base article. Note: this index methodology was created before the dawn of publicly available LLM and GPT tools, so it tends to underestimate the impact of automation on creative occupations such as writers, graphic designers, etc.

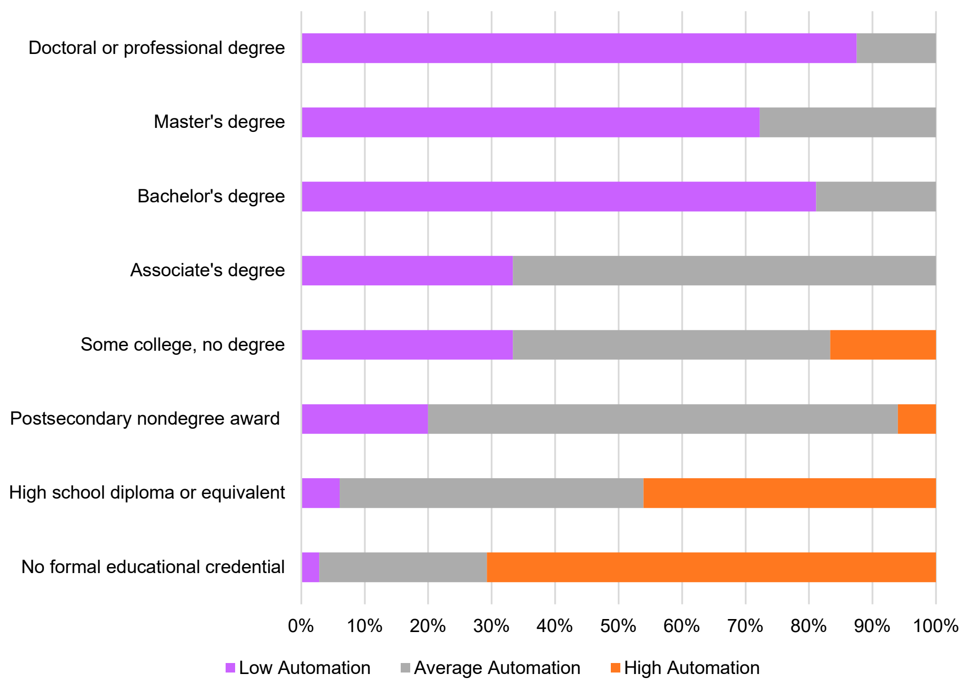
17 For this study, we classified automation index scores as the following:
1) Low Automation: <90
2) Average Automation: between 90 & 110
3) High Automation: >110

Figure 63 - Average Wages of Occupations by Automation Index Score, Prince George's County



Source: Lightcast

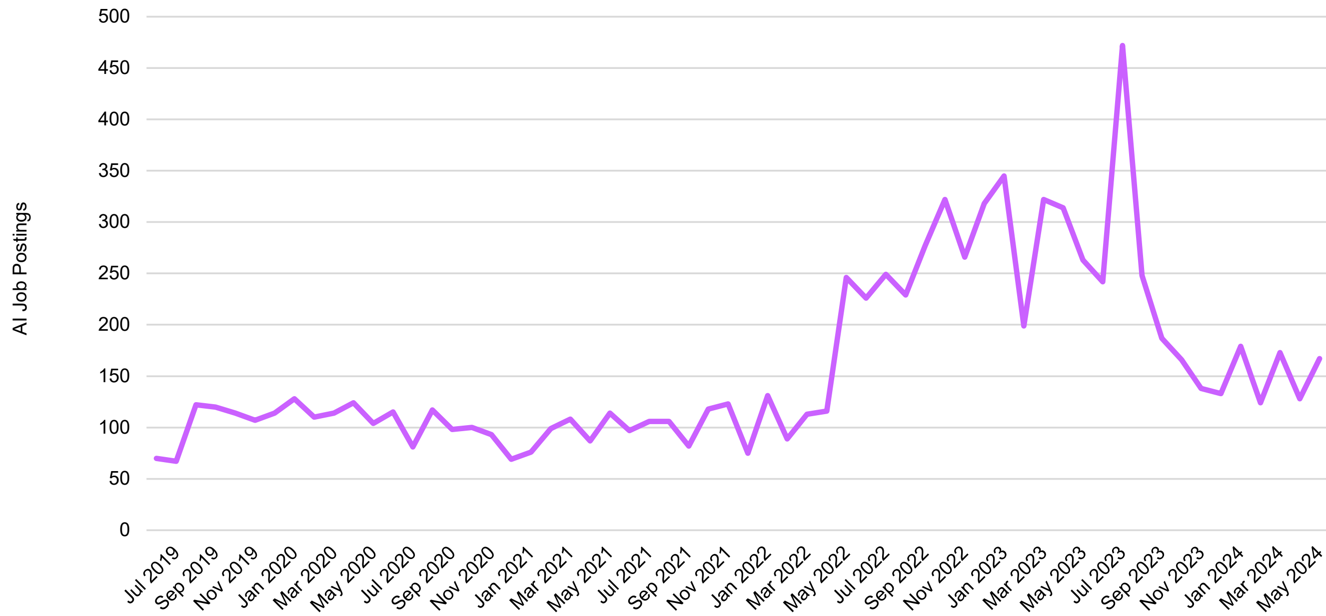
Figure 64 - Share of Automation Risk by Education Level, Prince George's County



Source: Lightcast

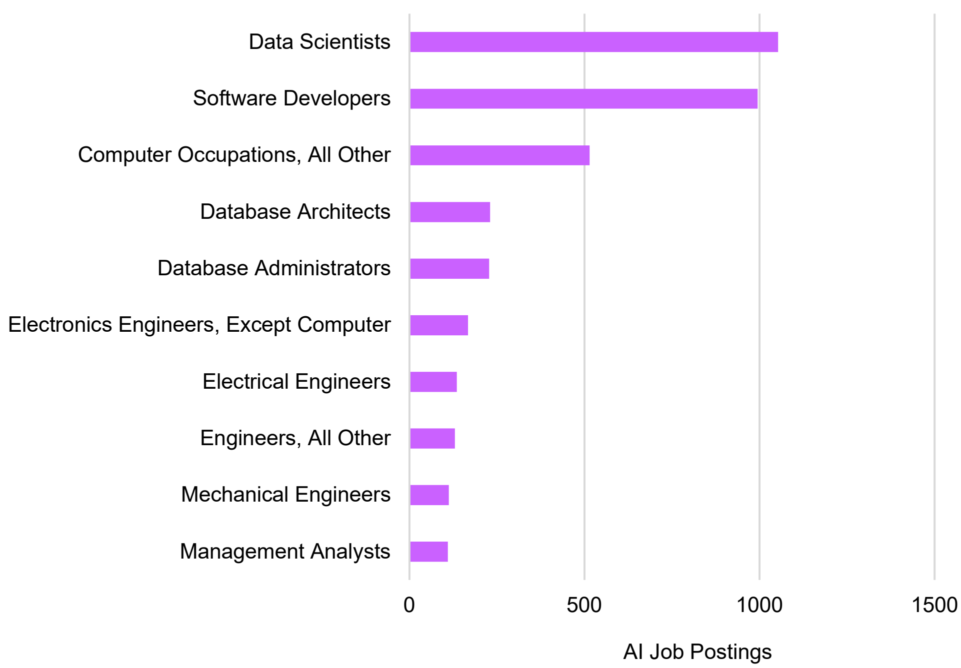
Job postings requesting AI skills have risen in Prince George's County. After a two-year period of elevated AI-skill demand, AI job postings have settled to about 150 per month, a 50% increase from the previous rate of roughly 100 postings per month (Figure 65). Demand for AI skills is concentrated in two main occupations: Data Scientists and Software Developers (Figure 66). The occupations with the most AI skill demand typically require postsecondary education and high skill.

Figure 65 - Job Postings Requesting AI Skills, Prince George's County, June 2019 - May 2024



Source: Lightcast

Figure 66 - Top Occupations with AI Skill Demand, Prince George's County, June 2019 – May 2024



Source: Lightcast

The top employers in the county requesting AI skills are:

- Johns Hopkins University Applied Physics Laboratory
- Guidehouse
- US Federal Government
- University of Maryland
- Leidos

Since Artificial Intelligence is primarily a software field, Lightcast examined the top software skills associated with AI. Most skills are growing or rapidly growing relative to the market (Table 31). Python is by far the leading skill and most in-demand programming language for AI, followed by C++. Other skills featured are cloud-based (Amazon Web Services) or pertain to data visualization (Tableau, Power BI).

Table 31 - Top Software Skills Related to AI, Prince George's County, June 2019 – May 2024

Skills	**Postings**	**% of Total Postings**	**Projected Skill Growth**	**Skill Growth Relative to Market**
Python (Programming Language)	3,489	48.4%	24.5%	Rapidly Growing
C++ (Programming Language)	1,699	23.6%	10.0%	Growing
MATLAB	1,370	19.0%	16.0%	Growing
Java (Programming Language)	1,310	18.2%	17.4%	Growing
SQL (Programming Language)	1,055	14.6%	6.4%	Stable
R (Programming Language)	1,025	14.2%	20.3%	Rapidly Growing
Linux	945	13.1%	8.9%	Growing
C (Programming Language)	907	12.6%	10.1%	Growing
Amazon Web Services (AWS)	888	12.3%	24.0%	Rapidly Growing
JavaScript (Programming Language)	715	9.9%	18.6%	Growing
Git (Version Control System)	603	8.4%	11.4%	Growing
Microsoft Azure	543	7.5%	28.9%	Rapidly Growing
Dashboard	539	7.5%	25.3%	Rapidly Growing
Tableau (Business Intelligence Software)	525	7.3%	20.8%	Rapidly Growing
Apache Spark	500	6.9%	14.7%	Growing
Docker (Software)	469	6.5%	19.9%	Rapidly Growing
Microsoft Excel	468	6.5%	17.7%	Growing
Power BI	448	6.2%	20.4%	Rapidly Growing
TensorFlow	422	5.9%	11.9%	Growing
Application Programming Interface (API)	401	5.6%	9.5%	Growing

Source: Lightcast

Industry Cluster Overview

Selection Methodology

This section of the report provides descriptions and analyses for seven (7) key industry clusters in Prince George's County and the Washington DC MSA.

First, industries at the 2-digit NAICS level were evaluated for priority focus by meeting at least four (4) of the following eight (8) criteria:

1. Large Local* Employment (>4% of Total)
2. Large Regional** Employment (>4% of Total)
3. Projected Local Growth (>0%)
4. Projected Regional Growth (>0%)
5. Large Local GRP (>2% of Total)
6. Large Regional GRP (>2% of Total)
7. Local Concentration (>0.80)
8. Regional Concentration (>0.80)

*Local refers to Prince George's County

**Regional refers to the Washington DC Metropolitan Statistical Area

Twelve industries met the focus criteria: Construction (NAICS 23), Retail Trade (NAICS 44), Transportation and Warehousing (NAICS 48), Information (NAICS 51), Real Estate and Rental and Leasing (NAICS 53), Professional, Scientific, and Technical Services (NAICS 54), Administrative and Support and Waste Management (NAICS 56), Health Care and Social Assistance (NAICS 62), Arts, Entertainment, and Recreation (NAICS 71), Accommodation and Food Services (NAICS 72), Other Services except Public Administration (NAICS 81), and Government (NAICS 90). Select industries were combined to best reflect the common and overlapping needs of employers/industry partners in the local labor market, resulting in seven custom industry clusters for analysis:

Seven (7) Key Industry Clusters Defined for Analysis	**Lightcast NAICS**
Construction & Real Estate & Rental & Leasing	23, 53
Transportation & Warehousing & Repair & Waste Management	48-49, 811, 562
Information & Computers	51, 5415
Professional, Scientific, & Technical Services, Administrative, Support, Nonprofit	54, 56, 813
(Excluding 5415, 562)	
Health Care & Social Assistance	62
Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services	44-45, 71, 72, 812
Government (Excluding Education)	90 (Excluding 902611, 902612, 902619, 903611, 903612, 903619)

Overview

Employment Trends

Table 32 illustrates the employment trends for key industry clusters in Prince George's County from 2018 to 2023, with growth projections and average annual earnings. The Government sector, with average earnings of $142,396, saw an 8% increase in employment between 2018 and 2023 and is projected to grow by an additional 6% by 2028. The Construction and Real Estate cluster experienced a 6% growth in the same period and anticipates a modest 1% increase by 2028.

However, clusters like Health Care and Social Assistance and Retail, Accommodation and Food Services, Arts, Entertainment, and Recreation, and Personal Services faced employment declines between 2018 and 2023 but are expected to see job growth by 2028. Notably, the Retail, Accommodation, and Food Services, Arts, Entertainment, and Recreation, and Personal Services cluster, which has the lowest average earnings among the clusters at $43,272, projects a 3% increase in jobs by 2028.

Table 32 - Key Industry Cluster Employment Trends, Prince George's County

Industry Cluster	2023 Jobs	% Change 2018-2023	% Change 2023-2028	Average Earnings
Construction & Real Estate & Rental & Leasing	41,528	6%	1%	$87,409
Transportation & Warehousing & Repair & Waste Management	21,910	5%	3%	$62,658
Information & Computers	12,245	1%	1%	$133,948
Professional, Scientific, & Technical Services, Administrative, Support, Nonprofit	39,856	-4%	0%	$76,631
Health Care & Social Assistance	31,913	-6%	2%	$77,206
Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services	80,762	-5%	3%	$43,272
Government (Excluding Education)	59,680	8%	6%	$142,396

Source: Lightcast

Cluster growth rates differ at the MSA level compared to the county level, as shown in Table 33 below. For instance, the Transportation & Warehousing & Repair & Waste Management sector grew by 11% between 2018 and 2023 in the MSA, compared to a 5% growth in the county, and is projected to see 7% additional growth by 2028, in contrast to the county's 3% projected growth. Generally, average earnings are higher at the regional level across all industry clusters, potentially incentivizing local workers to seek opportunities outside of Prince George's County.

Table 33 - Key Industry Cluster Employment Trends, Washington DC MSA

Industry Cluster	2023 Jobs	% Change 2018-2023	% Change 2023-2028	Average Earnings
Construction & Real Estate & Rental & Leasing	257,203	2%	1%	$94,359
Transportation & Warehousing & Repair & Waste Management	121,055	11%	7%	$70,892
Information & Computers	256,329	2%	4%	$171,487
Professional, Scientific, & Technical Services, Administrative, Support, Nonprofit	684,698	2%	3%	$125,881
Health Care & Social Assistance	352,922	3%	8%	$85,572
Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services	645,877	-6%	4%	$46,808
Government (Excluding Education)	599,747	2%	3%	$157,279

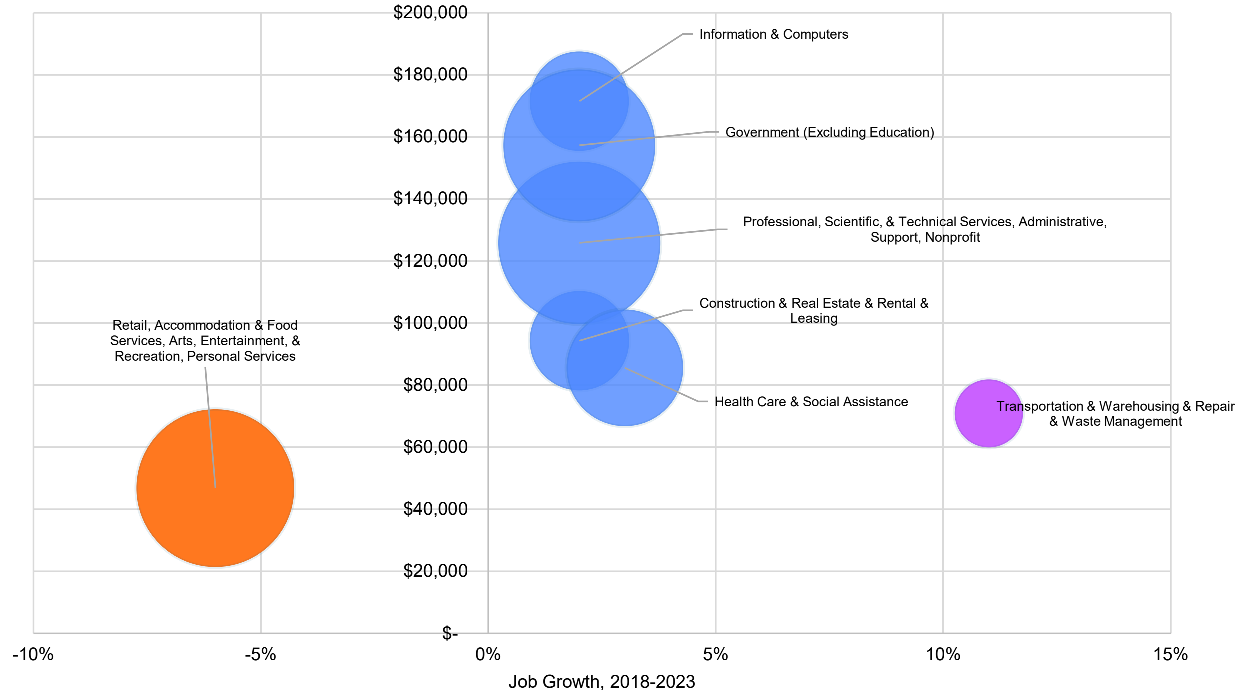
Source: Lightcast

Figure 67 below plots average earnings and job growth in key industry clusters in Prince George's County between 2018 and 2023 and Figure 68 provides a comparison to regional/MSA average earnings and job growth during the same period. These visual representations further elucidate the disparities and trends discussed, providing a clear snapshot of the economic landscape in Prince George's County relative to the broader MSA.

Figure 67 – Job Growth & Earnings Comparison in Key Industry Clusters, Prince George's County

Source: Lightcast

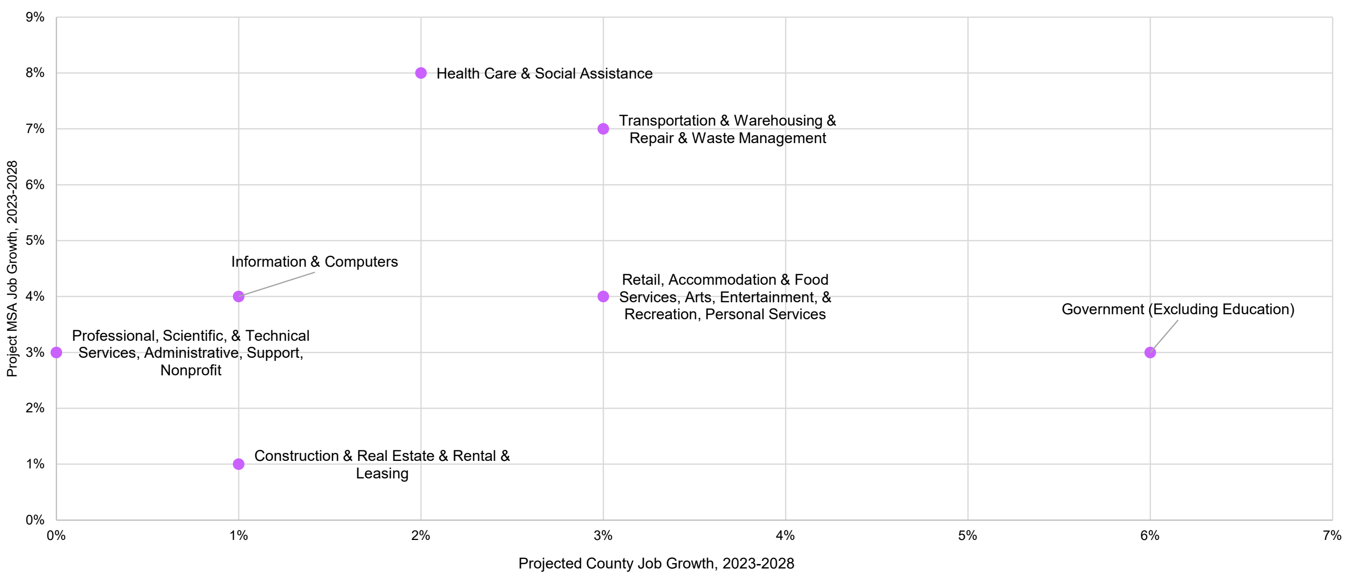
Figure 68 – Job Growth & Earnings Comparison in Key Industry Clusters, Washington DC MSA



Source: Lightcast

As shown in Figure 69 below, most industry clusters are expected to increase employment by 2028, with growth rates differing between county and metropolitan statistical area (MSA) levels. Specifically, the Government industry is projected to grow by 6% in Prince George's County, compared to 3% across the broader region. Employment in Professional Services is expected to grow 3% in the MSA, while remaining stagnant (0%) within Prince George's County.

Figure 69 – County vs MSA Industry Cluster Job Growth Comparison

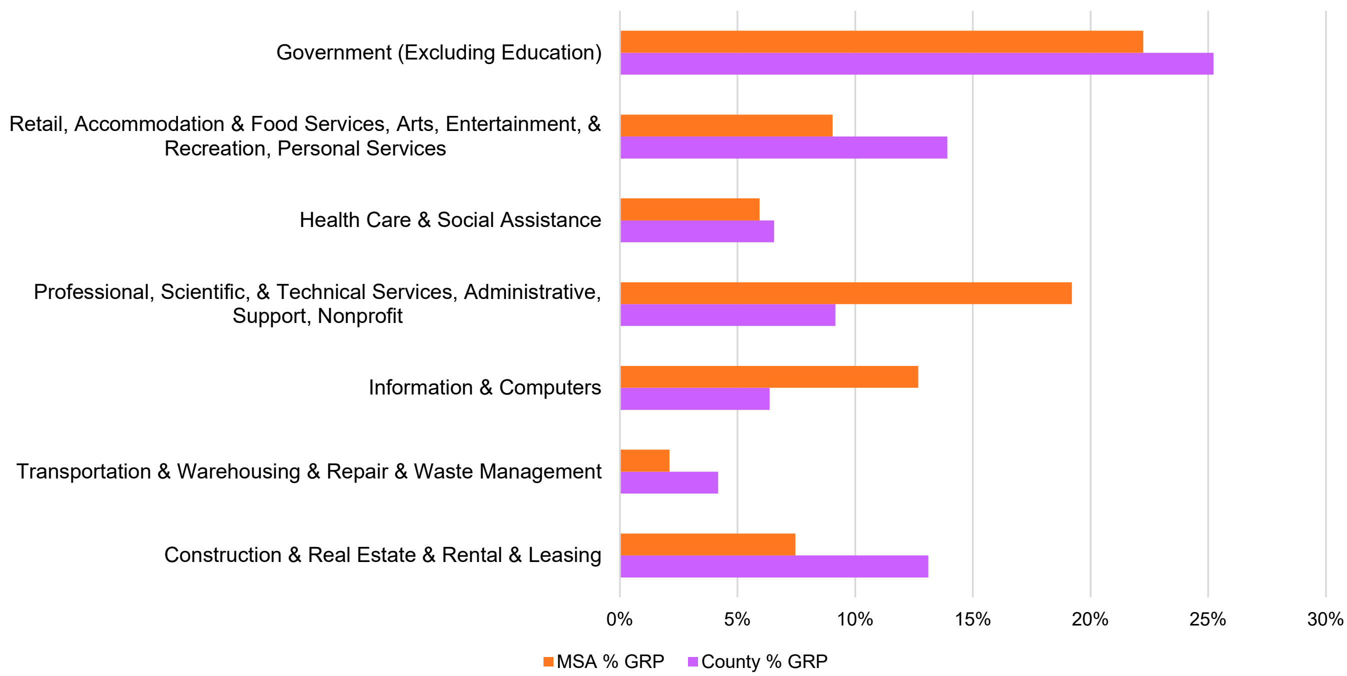


Source: Lightcast

Gross Regional Product

As depicted in Figure 70 below, the Government industry cluster contributes the highest percentage of gross regional product (GRP) in both Prince George's County (25%) and the Washington-Arlington-Alexandria MSA (22%). Marked differences between GRP contribution at the MSA versus county level are seen within Professional Services (19% MSA / 9% county) and Information & Computers (13% MSA / 6% county), while the county has proportionally higher contributions from Construction & Real Estate & Rental & Leasing (13% county / 7% MSA) and Retail, Accommodation & Food Services, Arts, Entertainment & Recreation, and Personal Services (14% county / 9% MSA).

Figure 70 – County vs MSA Industry Cluster Share of GRP



Source: Lightcast

In-Region vs Exported Sales

Table 34 displays the percentage of industry cluster sales retained within Prince George's County or the MSA, versus those exported. This information helps gauge the economic impact of industry clusters by assessing the revenue generated from sales outside the region. Healthcare and social assistance, primarily local services, have minimal exported sales, comprising only 9% of industry cluster sales in the county and 7% in the MSA. In contrast, the Government cluster predominantly exports its sales, with 96% in the county and 97% in the MSA. Industries that primarily export their products contribute fresh capital to the local economy, stimulating growth among other regional businesses.

Table 34 – County & MSA In-Region and Exported Sales, 2023

Industry Cluster	**2023 County Sales**	**County % Exported Sales**	**2023 MSA Sales**	**MSA % Exported Sales**
Construction & Real Estate & Rental & Leasing	$8,402,358,884 In-Region $4,669,652,717 Exported	36%	$80,964,404,660 In-Region $17,166,429,711 Exported	17%
Transportation & Warehousing & Repair & Waste Management	$1,974,001,632 In-Region $1,800,279,651 Exported	48%	$18,167,900,224 In-Region $6,520,038,254 Exported	26%
Information & Computers	$3,384,591,305 In-Region $1,127,705,865 Exported	25%	$67,424,209,044 In-Region $44,526,760,764 Exported	40%
Professional, Scientific, & Technical Services, Administrative, Support, Nonprofit	$5,569,455,538 In-Region $2,037,823,009 Exported	27%	$95,436,098,418 In-Region $94,243,800,930 Exported	49%
Health Care & Social Assistance	$4,326,741,473 In-Region $420,667,445 Exported	9%	$51,356,343,380 In-Region $3,956,593,420 Exported	7%
Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services	$7,327,875,698 In-Region $4,028,435,213 Exported	35%	$70,405,869,139 In-Region $21,853,843,218 Exported	24%
Government (Excluding Education)	$3,942,380,562 In-Region $90,418,473,996 Exported	96%	$32,502,016,456 In-Region $1,127,823,703,720 Exported	97%

Source: Lightcast

Total Demand & Demand Met In-Region

Table 35 shows the aggregate demand from consumers and businesses in Prince George's County and the regional MSA for products and services provided by each industry cluster, regardless of where they are produced. It also details the proportion of this local demand met by local/regional companies versus imports from outside the county/region. This analysis highlights opportunities for local businesses to increase their market share. For example, if only 20% of the county's demand for a product is currently fulfilled locally, the substantial remaining 80% of demand could potentially be captured by local establishments. For example, in the Construction & Real Estate & Rental & Leasing cluster, out of the $8.35 billion in county demand, 85% is met locally, while $1.47 billion worth is imported. This pattern varies across industry clusters, highlighting significant differences in local versus imported fulfillment rates.

Table 35 – County & MSA Demand, 2023

Industry Cluster	2023 County Demand	County % Met In-Region	2023 MSA Demand	MSA % Met In-Region
Construction & Real Estate & Rental & Leasing	$8,352,357,462 In-Region $1,471,874,744 Imported	85%	$80,587,338,762 In-Region $19,766,836,104 Imported	80%
Transportation & Warehousing & Repair & Waste Management	$1,957,357,830 In-Region $1,957,922,243 Imported	50%	$17,961,044,088 In-Region $17,039,511,172 Imported	51%
Information & Computers	$3,379,208,842 In-Region $3,827,374,159 Imported	47%	$67,298,198,124 In-Region $14,237,372,078 Imported	83%
Professional, Scientific, & Technical Services, Administrative, Support, Nonprofit	$5,553,759,836 In-Region $3,830,821,143 Imported	59%	$94,898,215,890 In-Region $18,291,932,406 Imported	84%
Health Care & Social Assistance	$4,309,580,779 In-Region $4,925,796,666 Imported	47%	$51,085,952,438 In-Region $21,899,404,443 Imported	70%
Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services	$7,258,261,747 In-Region $5,863,240,415 Imported	55%	$69,802,141,125 In-Region $39,693,949,209 Imported	64%
Government (Excluding Education)	$5,219,395,427 In-Region $43,823,500,578 Imported	11%	$77,283,017,275 In-Region $489,175,492,049 Imported	14%

Source: Lightcast

Recommendations

Policy

1) Become a data advocate.

The Workforce Transformation Policy Council (WTPC) convened by Jobs for the Future (JFF) and the National Association of Workforce Boards recently released the report [Driving Improved Workforce Outcomes Through Data Access, Alignment, and Integration](). The report contains pragmatic recommendations which Lightcast believes would be impactful for the workforce system. With that said, much of the improvements to data would require additional funding and resources at the state level, which is why Lightcast encourages the Board to voice its support for the following:

- Create metrics to track value, not just compliance – The WTPC specifically recommends "shift the data collection focus from achieving compliance to delivering value." Some examples of value driven metrics provided include:[18]
    - WIOA performance metrics beyond 12 months to enable longitudinal analysis
    - Net promoter scores from individuals and company clients
    - Return on Investment (ROI) for the participant by individual program
    - Deeper data to allow cross-cutting analysis on age, gender, race/ethnicity, and each supportive service provided
- Improve data sharing – the report also mentions that many support services and accompanying metrics may be disjointed. For instance, the definitions of shared variables are not standardized, and the data collection methods and tempo are different. The WTPC cites Texas as a best practice for a state effort to mandate data sharing efforts.[19]

2) Encourage State Workforce Board to adopt methodology to identify priority occupations.

It can be difficult for state and local workforce boards to identify – and justify – what programs should be invested in given the ever-evolving nature of the labor market. The recent turbulence from the pandemic, dawn of artificial intelligence, and growth in remote work has made this evident. The workforce system needs a methodology that can identify priority occupations (and thus programs) for investment based on 1) time-sensitive labor market metrics 2) regional considerations 3) with flexibility to reflect changing priorities regarding wages, pathway potential, job flexibility & stability, etc.

Lightcast recommends that the Maryland Governor's Workforce Development Board consider developing a methodology that reflects these considerations while making it transparent for local workforce systems to follow.

18 JFF Workforce Policy Transformation Council, "Driving Improved Workforce Outcomes Through Data Access, Alignment, and Integration," https://info.jff.org/hubfs/Policy/240520-Policy-Report-WTPCReportOnData-JA-v3.pdf?_gl=1*1hs6kwh*_gcl_au*MTcwNTAyMzMxNi4xNzIwNDQzNTA3*_ga*MTk2NDgxMzAyMC4xNzIwNDQzNTA0*_ga_3YKPLRZBRG*MTcyMDQ0MzUwMy4xLjEuMTcyMDQ0MzUwNC41OS4wLjA

19 JFF Workforce Policy Transformation Council, "Driving Improved Workforce Outcomes Through Data Access, Alignment, and Integration," https://info.jff.org/hubfs/Policy/240520-Policy-Report-WTPCReportOnData-JA-v3.pdf?_gl=1*1hs6kwh*_gcl_au*MTcwNTAyMzMxNi4xNzIwNDQzNTA3*_ga*MTk2NDgxMzAyMC4xNzIwNDQzNTA0*_ga_3YKPLRZBRG*MTcyMDQ0MzUwMy4xLjEuMTcyMDQ0MzUwNC41OS4wLjA

Programming

1) Improve "work readiness."

In recent employer sessions, a prevailing concern emerged regarding the effectiveness of job fairs in connecting employers with qualified candidates. During extensive discussions, employers consistently highlighted two primary challenges:

- Workforce Unpreparedness: Employers expressed dissatisfaction with the entry-level workforce's lack of essential soft skills. Issues such as poor communication, inadequate teamwork abilities, and an inability to adapt were commonly cited deficiencies.
- Blanket Applications: A surplus of candidates were observed applying indiscriminately, often without genuine interest or requisite qualifications for specific job roles. This phenomenon led to inefficiencies in candidate selection processes and increased frustration among recruiters.

Because of these challenges, Lightcast recommends the following:

- **Create "World of Work" rotations for youth and job candidates:** One reason for blanket applications may not be lack of genuine interest, but lack of awareness. To help candidates identify the universe of career possibilities in the industry they are applying for, it would be beneficial to expose youth and candidates to what it is like to work in the industry, the various roles and occupations, and what skills and expectations are associated with each. One way to achieve this could be to deploy WIOA Youth funds to provide World of Work rotations in key industries for OOS Youth and/or WIOA summer youth programming.
- **Targeted job interview and resume workshops:** To address these challenges, it is recommended to implement targeted workshops. These workshops will help job seekers articulate their interests and skills effectively, aligning them with job attributes that enhance their marketability. Emphasis should be placed on equipping candidates with the ability to speak confidently about their suitability for specific roles or industries.

2) Improve employer access to vetted candidates.

In response to the feedback that job fairs can be inefficient ways of identifying quality candidates for employers, Lightcast recommends several measures which would improve employer access to vetted candidates:

- **Electronic Access to Vetted Profiles:** To streamline candidate screening and enhance efficiency, we propose providing electronic access to vetted and screened profiles of candidates. Profiles will be enriched with badges indicating completion of soft skills training or endorsements from previous employers, thus highlighting candidates' proven capabilities.
- **Monthly Electronic Resume Drops:** A monthly electronic resume drop by email to select industry partners could prioritize the presentation of the most job-ready candidates. This initiative aims to expedite the matching process between employers and qualified candidates, ensuring timely consideration of highly suitable individuals.
- **Stock Pond Initiative (Referral to Support Services):** For promising yet unsuccessful candidates, the "Stock Pond" initiative would refer them to support services. These candidates will receive targeted skill polishing to bridge identified gaps, enhancing their readiness for employment. Moreover, profiles of these candidates could be shared with other employers, marked as endorsed by previous employers who recognize their potential (as a part of the pool of vetted profiles above). This would create a stock of employer vetted candidates available to work.

3) Redeploy workers.

Certain subsectors of the Information and Computers cluster are declining, while others are growing. Publishers of newspapers and periodicals and wired telecommunications carriers have shed thousands of jobs in the region. There is an opportunity here to redeploy these workers into the healthy and growing subsectors of the cluster by identifying the most common skills gaps between the previous and aspirational roles and creating targeted reskilling and upskilling programs to address these gaps. This same approach can be used for other sectors and subsectors that are in decline, such as certain parts of Retail. Assess opportunities for automation in declining occupations to maintain competitiveness and redirect resources towards higher-value roles.

Partnerships & Collaboration

1) Improve CTE Participation & Placement.

The K-12 education system is crucial to workforce development for several reasons. It provides students with the foundational skills necessary for any job (literacy, critical thinking, basic math) as well as develops soft skills through socialization. The system also prepares students for higher education and can be used to address workforce needs. Solving education challenges requires partnerships with the K-12 system.

CTE progression (that is, students that complete multiple CTE courses and concentrate in a CTE program) needs to drastically increase in Prince George's County to meet the level of its peers. The workforce system should work with the school system to brainstorm ways to increase interest in continued CTE progression among students.

Furthermore, the placement rate of CTE completers is too low considering the county's high pass rates of CTE Technical Skills Assessments. The workforce system should work with the K-12 system to make a concerted effort to 1) identify CTE students who pass TSAs and 2) work with them to find employment opportunities related to their CTE program of interest.

2) Analyze Black Unemployment.

The Black population has the highest unemployment rate despite having noticeably higher education attainment than the Hispanic population. People with lower educational attainment tend to experience higher unemployment rates. The high school dropout rates of the Black population are below the Hispanic & White populations, but above Asians. The Black population also has lower degree attainment than the White and Asian populations. Focus on degree completion programs such as the initiative of OneSpartanburg – Re:Degree – with the idea that degree holders have lower unemployment.

Black employment is overrepresented in 3 of the top 4 industries with highest unemployment (Retail, Accommodation & Food Services, and Administrative & Support). Encourage soft and transferable skill development to maximize labor market flexibility, enabling wider employment options when facing job loss. This need for soft skills was reiterated during the industry partner discussions.

Work with service providers and employers to discover other leading causes of this high unemployment. Are there structural barriers, such as benefits cliffs or transportation issues, creating disincentives? Is there limited access to professional networks and mentorship opportunities that restricts job opportunities for Black job seekers? Is there a mismatch between job availability and the type of work desired? Understanding the challenge is the first step towards creating solutions to solve it.

3) Close the Achievement Gap.

Prince George's County has lower scores in both English and Math proficiency compared to its peers. Though the Hispanic population has the highest Labor Force Participation Rates and among the lowest unemployment rates, there is a significant education achievement gap between this demographic and others. As the second largest (and fast growing) demographic group, employers will benefit greatly from maximizing the human capital that Hispanics offer.

- **Partnerships and Outreach:** Establish collaborative programs between the workforce system and K-12 schools serving Hispanic communities. These programs can focus on mentoring, tutoring, and academic support to improve academic performance and engagement. Engage parents and community leaders in educational initiatives to enhance support networks and encourage involvement in students' educational journeys.

- **Career and Technical Education (CTE) as a Pathway:** Hispanics are underrepresented in CTE enrollment. Link CTE to employment opportunities by strengthening connections between CTE programs and local employers. Incorporate industry certifications and work-based learning opportunities to enhance relevance and appeal for Hispanic students. Integrate ESL language support within CTE programs to ensure English language proficiency does not hinder students' ability to succeed in vocational training and certification programs. Develop specialized ESL curriculum modules tailored to the vocabulary and communication skills required in specific CTE fields, enhancing both language proficiency and technical competence.

- **Reducing Dropout Rates and Absenteeism:** Implement early warning systems to identify students at risk of dropping out. Provide targeted interventions such as counseling, academic support, and personalized learning plans to address barriers to attendance and academic success. Offer flexible learning options, including online coursework and blended learning models, to accommodate diverse student needs and schedules.

- **Expansion of ESL Options in ETPL/LTPL Programs:** Expand ESL options within Eligible Training Provider List (ETPL) and Local Training Provider List (LTPL) programs to provide language instruction aligned with vocational training. Ensure ESL programs meet industry standards and enhance employability.

4) Create Aging Workforce Task Force.

Short of a baby boom or a massive increase in a young immigrant population, Prince George's County should be prepared to face the reality that an aging workforce will be the norm. With fewer young people in the talent pipeline, employers will have to rely on the ability of their aging workforce to adapt to the high speed of skill demand change.

The aging workforce poses significant challenges related to the loss of institutional knowledge and succession planning in both employment and small business contexts. Lightcast suggests creating an Aging Workforce Task Force/Initiative to leverage retired individuals, support succession planning, and promote inclusivity in the workplace.

- **Promoting Age Inclusivity in the Workplace:** Identify challenges faced by older workers in the workplace, such as age discrimination, adapting to technological advancements, and health-related concerns. Work closely with employer partners to develop and promote shareable best practices for implementing flexible work arrangements, lifelong learning opportunities, and recognition programs to enhance engagement and productivity among older workers. Advocate for inclusive policies that accommodate the needs of older workers, including ergonomic adjustments, health and wellness programs, and phased retirement options.

- **Utilizing Retired Talent as Mentors and Instructors:** Establish programs to connect recently retired individuals with K-12 schools, colleges, and talent development programs as mentors, instructors, and trainers. This initiative can offer part-time, partial employment opportunities, enabling retirees to contribute their expertise while remaining active and engaged in the community. Facilitate the transfer of critical institutional knowledge and skills from retirees to younger generations through structured mentorship and training programs.

- **Succession Planning Support:** Encourage small business clients to collaborate with the Small Business Development Center (SBDC) to develop succession plans that ensure business continuity after retirement.

5) Create Workforce Behavioral Health Initiative.

Despite faring better than neighboring areas, Prince George's County is trending negatively in behavioral health, particularly in drug abuse and overdose rates. This negatively affects the labor market in a variety of ways and cannot be ignored.

- **Connect Employers with Experts to Build Awareness and Skills:** Connect employers with experts in behavioral and mental health (such as Prince George's County Behavioral Health Services) and run educational workshops that can help employers identify signs of behavioral health issues, learn best practices for dealing with behavioral health in the workplace, and introduce them to community resources.

- **Intervene Earlier:** Mental health issues have been growing among young people. The Board can be a powerful voice in advocating measures to increase mental health awareness and resiliency in its future workforce by liaising with the K-12 system. Consider advocating for a ban on mobile devices and social media – a significant contributor to mental health issues in youth - in the public school system as Los Angeles Unified School District has done. Encourage physical education to incorporate mental health education as well, such as integrating mindfulness and meditation training.

6) Leverage the Veteran Pipeline.

Andrew's Air Force Base is a major asset for the community. Creating an excellent pipeline of talent from military exits involves leveraging programs like the Department of Defense SkillBridge initiative, utilizing labor market information (LMI) for career coaching, and fostering partnerships with veteran-friendly employers.

- **Utilizing DoD SkillBridge Program:** Collaborate with the DoD SkillBridge program to identify military personnel exiting service, their Military Occupational Classification (MOC) codes, and align these skills with relevant Standard Occupational Classification (SOC) codes in the civilian job market.[20] Provide resources and guidance to veterans to translate their military experience and skills into qualifications that meet civilian job requirements, enhancing their employability.

- **Partnering with Veteran-Friendly Employers:** Develop a curated list of Veteran-friendly employer partners who actively seek veterans for employment, have established veteran onboarding processes, and offer supportive workplace environments. Collaborate with employer partners to share best practices for recruiting, hiring, and retaining veterans, including mentorship programs, skills translation support, and ongoing professional development opportunities.

20 Note: O*NET provides a crosswalk for such purposes.

Organizational Improvement

1) Deputize Staff.

• Empowering operator staff with decision-making authority for strategy involves delegating the responsibility to make strategic decisions within the organization in consultation with the Board. Some indecision and delays observed during the course of this project could stem from bureaucratic constraints inherent in programs like the Workforce Innovation and Opportunity Act (WIOA), where decision-making may be subject to procedural hurdles. Alternatively, it may arise due to a lack of delegation within the organizational structure. By deputizing staff with the authority to make strategic decisions, organizations can foster speed and agility, responsiveness, and proactive decision-making, ultimately driving more effective and timely strategic outcomes.

2) Curate Deeper Data.

• This recommendation is connected to the previous recommendation to become data advocates. In addition to advocating for more value-driven metrics, some of which are dependent on additional state and federal resources, the Board can take steps to encourage deeper data cultivation on its own. For instance, Lightcast noticed the LTPL list did not contain CIP codes assigned to each program. We recommend doing so, as it would allow the organization to quickly compare local vs state coverage of programs (and thus occupations through CIP-SOC mapping).

3) Match Career Coaching with Labor Market Information (LMI).

• Equip career coaches with LMI data to analyze market trends, identify emerging industries, and highlight job opportunities that align with skills and interests. Assist customers in identifying skills gaps through personalized assessments and provide tailored training or educational opportunities to bridge these gaps.

4) Train Staff and Career Advisors on Industry Clusters.

• From internal feedback during industry cluster engagement sessions, it appears that industry jargon and terminology is an impediment to program staff being able to translate the cluster's needs into layman's terms, particularly for IT. Lightcast recommends organizing a "train-the-trainer" session for career coaches and staff alike, facilitated by an IT professional. This initiative enhances team readiness to support and guide individuals in navigating the complexities of the job market effectively.

Conclusion

In summary, Prince George's County is dealing with a labor market that has changed significantly over the past five years. Although the population is increasing, the number of people approaching retirement is growing faster than other age groups. This demographic shift means that the proportion of young people in the total population is shrinking, while the proportion of older individuals is increasing.

These age-related changes are contributing to a decline in the Labor Force Participation Rate (LFPR) and present a challenge for employers who must adapt to an aging workforce. Additionally, the COVID-19 pandemic continues to affect the labor force by degrading the quality of the talent pipeline: fewer college graduates, rising absenteeism and dropout rates in K-12 education, increasing mental health issues and drug overdoses, and noticeable declines in soft skills and social development among new workforce entrants.

Addressing these challenges will require more than just individual efforts. It demands strengthening relationships and partnerships, confronting difficult issues, and sharing responsibility to achieve the ultimate goal of enhancing the work and life prospects of the people in Prince George's County.

The challenges will require even greater alignment between the needs of industry and the talent development ecosystem, including the public workforce system. To understand these needs, Prince George's County has identified seven in-demand industry clusters in accordance with the county's local WIOA plan to inform fiscal investments and future planning. The industry clusters were selected by the following method:

First, we evaluated industries at the 2-digit NAICS level, narrowing down those for consideration as an in-demand industry if they met at least four (4) of the following eight (8) criteria:

1. Large Local* Employment (>4% of Total)
2. Large Regional** Employment (>4% of Total)
3. Projected Local Growth (>0%)
4. Projected Regional Growth (>0%)
5. Large Local GRP (>2% of Total)
6. Large Regional GRP (>2% of Total)
7. Local Concentration (>0.80)
8. Regional Concentration (>0.80)

*Local refers to Prince George's County
**Regional refers to the Washington DC Metropolitan Statistical Area

Then, these qualifying industries were combined into clusters with some minor definition tweaks to best reflect the common and overlapping needs of employers/industry partners in the local labor market. This resulted in seven custom industry clusters whose sector definitions are as follows:

Seven (7) Key Industry Clusters Defined for Analysis	**Lightcast NAICS**
Construction & Real Estate & Rental & Leasing	23, 53
Transportation & Warehousing & Repair & Waste Management	48-49, 811, 562
Information & Computers	51, 5415
Professional, Scientific, & Technical Services, Administrative, Support, Nonprofit	54, 56, 813
(Excluding 5415, 562)	
Health Care & Social Assistance	62
Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services	44-45, 71, 72, 812
Government (Excluding Education)	90 (Excluding 902611, 902612, 902619, 903611, 903612, 903619)

An in-depth analysis of each of these industry clusters can be found in the Appendix.

Appendix – Industry Cluster In-Depth Analysis

Construction, Real Estate, Rental, & Leasing

Overview

For this analysis, a custom definition of the Construction & Real Estate & Rental & Leasing industry cluster includes the following NAICS industry classification codes:

NAICS 23: The Construction sector comprises establishments primarily engaged in the construction of buildings or engineering projects (e.g., highways and utility systems). Establishments primarily engaged in the preparation of sites for new construction and establishments primarily engaged in subdividing land for sale as building sites also are included in this sector.

Construction work done may include new work, additions, alterations, or maintenance and repairs. Activities of these establishments generally are managed at a fixed place of business, but they usually perform construction activities at multiple project sites. Production responsibilities for establishments in this sector are usually specified in (1) contracts with the owners of construction projects (prime contracts) or (2) contracts with other construction establishments (subcontracts).

Establishments primarily engaged in contracts that include responsibility for all aspects of individual construction projects are commonly known as general contractors, but also may be known as design-builders, construction managers, turnkey contractors, or (in cases where two or more establishments jointly secure a general contract) joint-venture contractors. Construction managers that provide oversight and scheduling only (i.e., agency) as well as construction managers that are responsible for the entire project (i.e., at risk) are included as general contractor type establishments. Establishments of the "general contractor type" frequently arrange construction of separate parts of their projects through subcontracts with other construction establishments.

NAICS 53: The Real Estate and Rental and Leasing sector comprises establishments primarily engaged in renting, leasing, or otherwise allowing the use of tangible or intangible assets, and establishments providing related services. The major portion of this sector comprises establishments that rent, lease, or otherwise allow the use of their own assets by others. The assets may be tangible, as is the case of real estate and equipment, or intangible, as is the case with patents and trademarks.

This sector also includes establishments primarily engaged in managing real estate for others, selling, renting and/or buying real estate for others, and appraising real estate. These activities are closely related to this sector's main activity, and from a production basis they are included here. In addition, a substantial proportion of property management is self-performed by lessors.

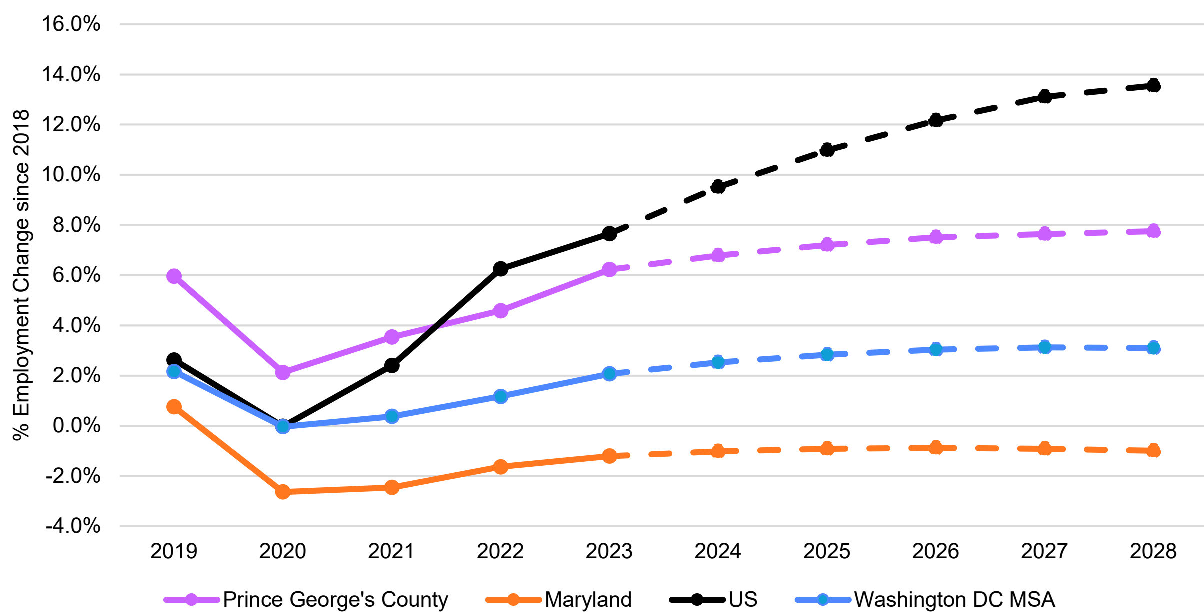
The main components of this sector are the real estate lessors industries (including equity real estate investment trusts (REITs)); equipment lessors industries (including motor vehicles, computers, and consumer goods); and lessors of nonfinancial intangible assets (except copyrighted works).

Excluded from this sector are establishments primarily engaged in renting or leasing equipment with operators. Establishments renting or leasing equipment with operators are classified in various subsectors of NAICS depending on the nature of the services provided (e.g., transportation, construction, agriculture).

Employment Growth

As Figure 71 illustrates, employment growth in the Construction and Real Estate and Rental and Leasing sector in Prince George's County has exceeded that of the Washington DC MSA and the state of Maryland since 2018. Cluster employment in Prince George's County is expected to grow steadily, requiring a proactive talent pipeline strategy and collaboration with industry partners.

Figure 71. Employment Trends in Construction, Real Estate, and Rental and Leasing Sector by Region



Source: Lightcast

Employment by Establishment Size

A regional workforce strategy should consider the distribution of establishment sizes within key industry clusters for several reasons:

- The size of establishments directly correlates with the number of jobs they create. Larger establishments typically employ more people than smaller ones. Understanding this distribution helps in assessing the overall employment potential of the cluster within the region.

- A diverse range of establishment sizes can contribute to economic resilience. Smaller establishments may be more agile and innovative, while larger ones provide stability and can withstand economic fluctuations differently.

- Different establishment sizes often require varying skill sets and levels of training. Large establishments may demand specialized skills and advanced training, while smaller ones might require more generalized skills. Tailoring workforce development programs to accommodate these differences ensures that the workforce meets the cluster's diverse needs.

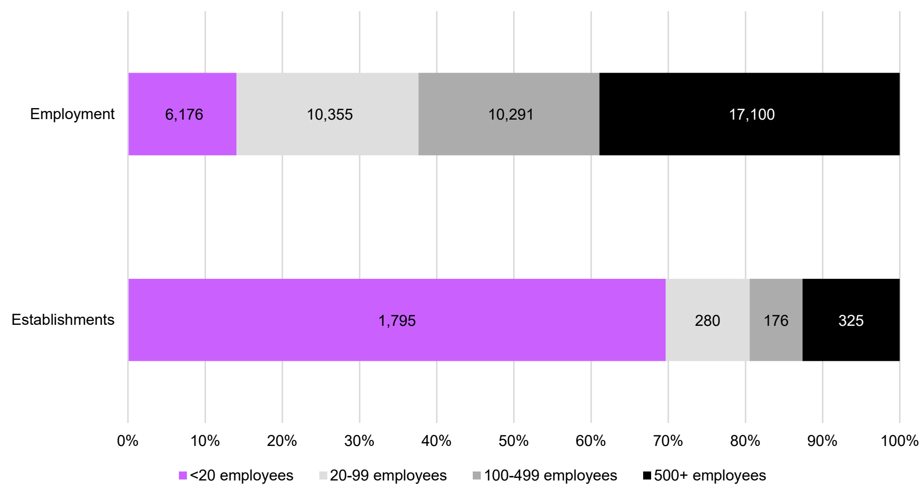
- Small and medium-sized establishments are often hubs of innovation and entrepreneurial activity. Supporting a healthy distribution encourages innovation within the cluster, potentially leading to new products, services, and market opportunities.

A balanced distribution of establishment sizes can enhance the overall competitiveness of the cluster. It promotes healthy competition, collaboration, and a diverse range of offerings that cater to various market segments and customer needs.

As Figures 72 and 73 below show, Washington, D.C., MSA has a slightly larger share of employment in establishments with fewer than 20 people compared to Prince George's County. There are 1,795 cluster establishments in Prince George's County (70% of the cluster total) that have fewer than 20 employees, while just 13% of establishments in the cluster have 500 or more employees. Despite this, establishments of 500 or more employees account for the largest share of total cluster employment (39%). Establishments with fewer than 20 employees account for just 14% of total employment (6,176 employees).

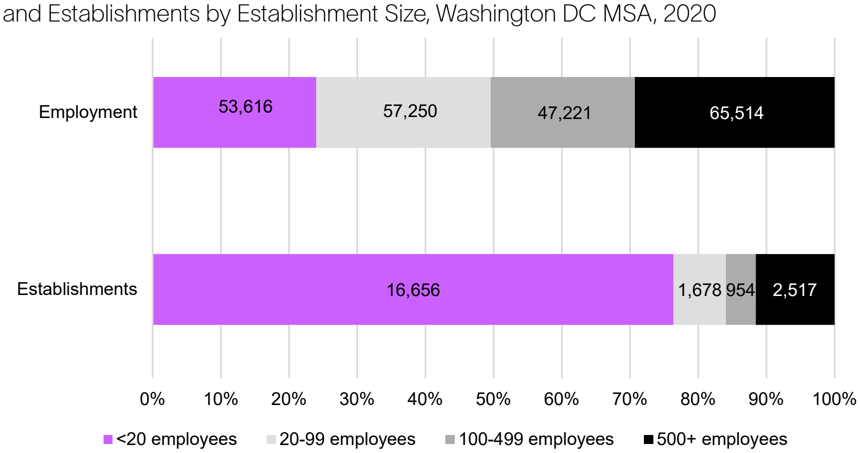
At the MSA level, roughly 76% of cluster establishments have fewer than 20 employees. Yet this establishment size only accounts for 53,616 employees, or 24% of total cluster employment. Establishments with 500 or more employees account for just 12% of total cluster establishments but 29% of cluster employment (65,514 employees). Compared to other clusters, the distribution of employment across establishment sizes is more balanced, particularly for the MSA. This reduces the risk of shocks if large employers experience layoffs or contractions.

Figure 72 - Construction & Real Estate & Rental & Leasing Employment and Establishments by Establishment Size, Prince George's County, 2020



Source: Lightcast

Figure 73 - Construction & Real Estate & Rental & Leasing Employment and Establishments by Establishment Size, Washington DC MSA, 2020



Source: Lightcast

Cluster Subsector Analysis

Subsector Key Metrics

Fifty-five (55) 6-digit industry subsectors make up the Construction and Real Estate and Rental and Leasing cluster in the Washington DC Metropolitan Statistical Area (MSA). See Table 36 below for the full list of industry subsectors, ranked by 2023 employment size. Included in Table 36 are each subsector's average earnings, total 2022 gross regional product (GRP) and the subsector's share of total GRP in the Construction and Real Estate and Rental and Leasing industry cluster.

Top subsectors reflect a wide range of specialized activities and average wages. The subsector with the highest number of jobs is Administrative Management and General Management Consulting Services (73,641 jobs), followed closely by Offices of Lawyers (47,449 jobs). Average earnings vary significantly across subsectors, reflecting the range of professional roles and skill levels. Offices of Lawyers provide nearly 15% of the cluster's GRP and offer average wages of $223,442 for highly educated and specialized professionals. The Janitorial Services subsector provides a similar number of jobs within the MSA, however contributes a much lower share of cluster GRP and significantly lower average wages ($35,119).

The presence of various specialized services such as Engineering Services, Architectural Services, and Environmental Consulting Services reflects demand for specialized expertise across diverse fields. Smaller subsectors like Research and Development in Nanotechnology and Marketing Research and Public Opinion Polling represent emerging areas within the Professional Services industry cluster, suggesting potential growth opportunities in specialized consulting and research fields.

Table 36 - Construction & Real Estate & Rental & Leasing Subsectors, Washington, D.C. MSA

NAICS	Subsector	2023 Jobs	Average Earnings	2022 GRP	Share of Cluster GRP
238220	Plumbing, Heating, and Air-Conditioning Contractors	28,753	$94,964	$3,607,648,395	8.1%
238210	Electrical Contractors and Other Wiring Installation Contractors	25,122	$102,156	$3,315,391,958	7.5%
236220	Commercial and Institutional Building Construction	21,118	$120,328	$3,202,805,121	7.2%
236118	Residential Remodelers	18,365	$68,293	$1,925,801,501	4.3%
531311	Residential Property Managers	13,000	$83,238	$1,519,069,056	3.4%
531210	Offices of Real Estate Agents and Brokers	12,729	$118,438	$3,758,012,147	8.5%
238990	All Other Specialty Trade Contractors	12,112	$72,787	$1,433,309,732	3.2%
531110	Lessors of Residential Buildings and Dwellings	10,385	$87,847	$2,629,439,527	5.9%
237310	Highway, Street, and Bridge Construction	8,979	$99,934	$1,156,841,639	2.6%
531312	Nonresidential Property Managers	8,072	$143,044	$1,504,387,084	3.4%
238910	Site Preparation Contractors	7,594	$74,303	$932,094,074	2.1%
238310	Drywall and Insulation Contractors	7,411	$73,478	$816,340,507	1.8%
238110	Poured Concrete Foundation and Structure Contractors	6,600	$82,051	$708,181,204	1.6%
238320	Painting and Wall Covering Contractors	6,411	$61,043	$803,941,773	1.8%
531120	Lessors of Nonresidential Buildings (except Miniwarehouses)	5,070	$135,965	$2,973,344,204	6.7%
236115	New Single-Family Housing Construction (except For-Sale Builders)	4,882	$99,119	$658,948,528	1.5%
238140	Masonry Contractors	4,781	$71,679	$513,941,626	1.2%
238350	Finish Carpentry Contractors	4,302	$71,467	$648,074,787	1.5%
531390	Other Activities Related to Real Estate	4,270	$138,999	$2,780,831,919	6.3%
238160	Roofing Contractors	4,215	$83,394	$487,111,390	1.1%
237130	Power and Communication Line and Related Structures Construction	4,105	$94,061	$525,358,171	1.2%

NAICS	Subsector	2023 Jobs	Average Earnings	2022 GRP	Share of Cluster GRP
237110	Water and Sewer Line and Related Structures Construction	3,648	$84,683	$355,229,947	0.8%
236117	New Housing For-Sale Builders	3,211	$133,483	$546,653,058	1.2%
238330	Flooring Contractors	2,717	$62,944	$372,823,993	0.8%
238390	Other Building Finishing Contractors	2,660	$74,243	$293,415,243	0.7%
238290	Other Building Equipment Contractors	2,494	$127,035	$410,808,464	0.9%
238150	Glass and Glazing Contractors	2,105	$87,470	$236,289,441	0.5%
532111	Passenger Car Rental	2,045	$71,542	$553,085,042	1.2%
238120	Structural Steel and Precast Concrete Contractors	1,969	$86,398	$221,791,184	0.5%
238340	Tile and Terrazzo Contractors	1,808	$70,324	$218,593,316	0.5%
531130	Lessors of Mini-warehouses and Self-Storage Units	1,692	$73,031	$722,934,748	1.6%
238130	Framing Contractors	1,359	$69,465	$174,379,040	0.4%
237990	Other Heavy and Civil Engineering Construction	1,293	$100,933	$187,554,063	0.4%
532490	Other Commercial and Industrial Machinery and Equipment Rental and Leasing	1,249	$79,279	$408,667,749	0.9%
532412	Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing	1,095	$94,676	$363,529,098	0.8%
236116	New Multifamily Housing Construction (except For-Sale Builders)	1,077	$135,599	$181,747,973	0.4%
532289	All Other Consumer Goods Rental	1,071	$69,527	$157,868,637	0.4%
532120	Truck, Utility Trailer, and RV (Recreational Vehicle) Rental and Leasing	1,050	$61,704	$248,965,585	0.6%
237120	Oil and Gas Pipeline and Related Structures Construction	964	$101,978	$135,668,311	0.3%
237210	Land Subdivision	887	$147,407	$178,208,199	0.4%
238170	Siding Contractors	883	$66,035	$116,942,116	0.3%
238190	Other Foundation, Structure, and Building Exterior Contractors	832	$70,489	$98,923,431	0.2%
531190	Lessors of Other Real Estate Property	664	$126,253	$273,268,103	0.6%
236210	Industrial Building Construction	511	$121,968	$81,796,610	0.2%
531320	Offices of Real Estate Appraisers	429	$86,736	$115,056,682	0.3%
532420	Office Machinery and Equipment Rental and Leasing	345	$108,915	$126,236,380	0.3%
532310	General Rental Centers	295	$82,441	$57,173,142	0.1%
533110	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	185	$157,210	$1,466,385,514	3.3%
532284	Recreational Goods Rental	175	$58,593	$23,194,899	0.1%
532283	Home Health Equipment Rental	93	$71,491	$14,351,127	0.0%
532112	Passenger Car Leasing	48	$155,845	$35,294,087	0.1%
532210	Consumer Electronics and Appliances Rental	24	$92,348	$5,290,023	0.0%
532282	Video Tape and Disc Rental	22	$361,361	$13,923,826	0.0%
532411	Commercial Air, Rail, and Water Transportation Equipment Rental and Leasing	14	$170,641	$12,535,093	0.0%
532281	Formal Wear and Costume Rental	12	$79,773	$3,489,714	0.0%

Source: Lightcast

Strong, Emerging, Threatened Subsectors

Lightcast's analysis includes an assessment of Construction and Real Estate and Rental and Leasing industry subsectors relative to their concentration in the county or the MSA and the projected growth/decline in jobs and concentration.

At the county level, strong industry subsectors are defined as having a location quotient (LQ) of 1.1 or higher in 2023 and projected job growth of > 20 jobs by 2028. At the MSA level, strong industry subsectors are defined as having a location quotient (LQ) of 1.1 or higher in 2023 and projected job growth of > 100 jobs by 2028.

Table 37 - STRONG Construction Real Estate, Rental, & Leasing Industry Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
236118	Residential Remodelers	236118	Residential Remodelers
236220	Commercial and Institutional Building Construction	236220	Commercial and Institutional Building Construction
237110	Water and Sewer Line and Related Structures Construction	237310	Highway, Street, and Bridge Construction
237310	Highway, Street, and Bridge Construction	238310	Drywall and Insulation Contractors
237990	Other Heavy and Civil Engineering Construction	531312	Nonresidential Property Managers
238110	Poured Concrete Foundation and Structure Contractors	531390	Other Activities Related to Real Estate
238120	Structural Steel and Precast Concrete Contractors		
238190	Other Foundation, Structure, and Building Exterior Contractors		
238220	Plumbing, Heating, and Air-Conditioning Contractors		
238340	Tile and Terrazzo Contractors		
238390	Other Building Finishing Contractors		
238990	All Other Specialty Trade Contractors		
531311	Residential Property Managers		
532111	Passenger Car Rental		
532289	All Other Consumer Goods Rental		
532420	Office Machinery and Equipment Rental and Leasing		
532490	Other Commercial and Industrial Machinery and Equipment Rental and Leasing		

Source: Lightcast

At the county level, emerging industry subsectors are defined as having a location quotient (LQ) between 0.90 and 1.1, a growing LQ, and projected growth of at least 20 jobs by 2028. At the MSA level, emerging industry subsectors are defined as having a location quotient (LQ) between 0.90 and 1.1, a growing LQ, and projected growth of at least 100 jobs by 2028.

Table 38 – EMERGING Construction Real Estate, Rental, & Leasing Industry Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
		238990	All Other Specialty Trade Contractors

Source: Lightcast

At the county level, threatened industry subsectors are defined as having a location quotient (LQ) of .90 or lower in 2023 and projected job decline of 20 or more jobs by 2028. At the MSA level, threatened industry subsectors are defined as having a location quotient (LQ) of .90 or lower in 2023 and projected job decline of 100 or more jobs by 2028.

Table 39 - THREATENED Construction Real Estate, Rental, & Leasing Industry Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
238150	Glass and Glazing Contractors	237210	Land Subdivision
238160	Roofing Contractors	238140	Masonry Contractors
238210	Electrical Contractors and Other Wiring Installation Contractors	531110	Lessors of Residential Buildings and Dwellings
238290	Other Building Equipment Contractors		
238310	Drywall and Insulation Contractors		
238320	Painting and Wall Covering Contractors		
238350	Finish Carpentry Contractors		
531110	Lessors of Residential Buildings and Dwellings		

Source: Lightcast

Subsectors with High Concentration

In the Washington-Arlington-Alexandria MSA, multiple subsectors within the Construction and Real Estate and Rental and Leasing cluster have employment concentrations above the national average, led by Nonresidential Property Managers with a concentration of 2.12. Residential Remodelers and Residential Property Managers also show substantial employment figures of 18,365 and 13,000 jobs, respectively, reflecting the region's active housing market and demand for property management services (see Table 40 below).

Table 40 - Construction & Real Estate & Rental & Leasing Subsectors with High Concentration of Employment, Washington DC MSA

Industry Subsector	2023 Jobs	2023 Employment Concentration
Nonresidential Property Managers	8,072	2.12
New Housing For-Sale Builders	3,211	1.65
Office Machinery and Equipment Rental and Leasing	345	1.58
Other Activities Related to Real Estate	4,270	1.58
Commercial and Institutional Building Construction	21,118	1.30
Masonry Contractors	4,781	1.26
Glass and Glazing Contractors	2,105	1.19
Highway, Street, and Bridge Construction	8,979	1.17
Residential Remodelers	18,365	1.16
Other Building Finishing Contractors	2,660	1.14
Drywall and Insulation Contractors	7,411	1.13
Residential Property Managers	13,000	1.12

Source: Lightcast

Occupations & Skills

Top Occupations

Table 41 lists the top 20 Construction & Real Estate & Rental & Leasing occupations in the Washington-Arlington-Alexandria MSA. Together, these occupations account for 65.7% of all cluster employment. The table provides employment level trends by occupation within the cluster between 2018 - 2023, and projected employment by 2028 to identify growth trends and the potential for workforce strategies to address anticipated demand growth (or decline). The table also includes the number of people employed in that occupation in all industries in the MSA. This indicates the level of competition employers may face from industries outside the Construction & Real Estate & Rental & Leasing cluster when hiring for key occupations.

Construction Laborers, despite a slight decrease of 3% from 2018 to 2023, remain the top cluster occupation, accounting for 21,829 jobs. Electricians and Heating, Air Conditioning, and Refrigeration Mechanics and Installers have experienced notable increases in employment (17% and 21% respectively), reflecting the ongoing demand for skilled trade workers in construction and property maintenance activities. Further growth is projected, suggesting sustained opportunities in these fields.

Table 41 - Top 20 Construction & Real Estate & Rental & Leasing Occupations

Occupation	Employed in Cluster 2023	% Change 2018 - 2023	Projected % Change 2023 - 2028	% of Total Jobs in Industry 2023	All Jobs for Occupation in MSA 2023	County Resident Workers 2023
Construction Laborers	21,829	(3%)	3%	8.5%	24,052	3,988
Carpenters	16,256	(12%)	0%	6.3%	17,788	2,747
First-Line Supervisors of Construction Trades and Extraction Workers	14,562	6%	0%	5.7%	17,364	2,491
Electricians	13,711	17%	5%	5.3%	16,849	2,412
General and Operations Managers	10,525	54%	0%	4.1%	102,617	14,515
Construction Managers	9,261	17%	4%	3.6%	10,390	1,733
Real Estate Sales Agents	8,532	(12%)	6%	3.3%	9,156	889
Plumbers, Pipefitters, and Steamfitters	7,830	(8%)	0%	3.0%	9,325	1,588
Property, Real Estate, and Community Association Managers	7,278	16%	0%	2.8%	8,885	1,369
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	7,227	21%	2%	2.8%	8,981	1,301
Maintenance and Repair Workers, General	7,204	1%	3%	2.8%	27,245	4,019
Project Management Specialists	7,166	290%	(1%)	2.8%	34,742	4,351
Office Clerks, General	7,152	(5%)	(3%)	2.8%	50,646	5,892
Painters, Construction and Maintenance	5,673	(14%)	(2%)	2.2%	6,643	1,087
Operating Engineers and Other Construction Equipment Operators	4,628	17%	4%	1.8%	6,696	927
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	4,535	(34%)	(6%)	1.8%	42,194	7,331
Managers, All Other	4,237	25%	5%	1.6%	54,079	7,921
Counter and Rental Clerks	3,956	(19%)	2%	1.5%	7,488	1,013
Cement Masons and Concrete Finishers	3,892	0%	(2%)	1.5%	4,044	523
Accountants and Auditors	3,500	38%	1%	1.4%	48,442	5,146

Source: Lightcast

Occupational Supply & Demand

Table 42 provides insight into the supply and demand dynamics for various occupations within the Construction & Real Estate & Rental & Leasing industry cluster in the Washington-Arlington-Alexandria MSA. The table highlights occupations where there is a significant gap between the estimated active supply (the number of individuals currently employed or available in the workforce) and the estimated active demand (the number of positions currently needed by employers).

Managers, All Other face the largest gap with an estimated supply of 3,638 individuals compared to a demand of 7,674 positions, indicating a substantial deficit of 4,036 professionals. Project Management Specialists, a fast-growing specialization in this cluster is currently undersupplied by an estimated 1,556 professionals. Understanding these supply-demand gaps is crucial for aligning education programming, training, upskilling, and reskilling initiatives, and recruitment strategies to address the most critical labor market imbalances within key industry clusters.

Table 42 - Largest Supply-Demand Gaps in Construction & Real Estate & Rental & Leasing Industry Cluster, Washington DC MSA

Occupation	Active Supply Estimate	Active Demand Estimate	Supply / Demand Gap
Managers, All Other	3,638	7,674	(4,036)
Maintenance and Repair Workers, General	750	2,534	(1,784)
Project Management Specialists	1,189	2,746	(1,556)
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	2,438	3,612	(1,174)
Accountants and Auditors	1,604	2,648	(1,044)
Construction Managers	607	1,409	(802)
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	223	805	(582)
Property, Real Estate, and Community Association Managers	552	912	(360)
Real Estate Sales Agents	728	883	(155)

Source: Lightcast

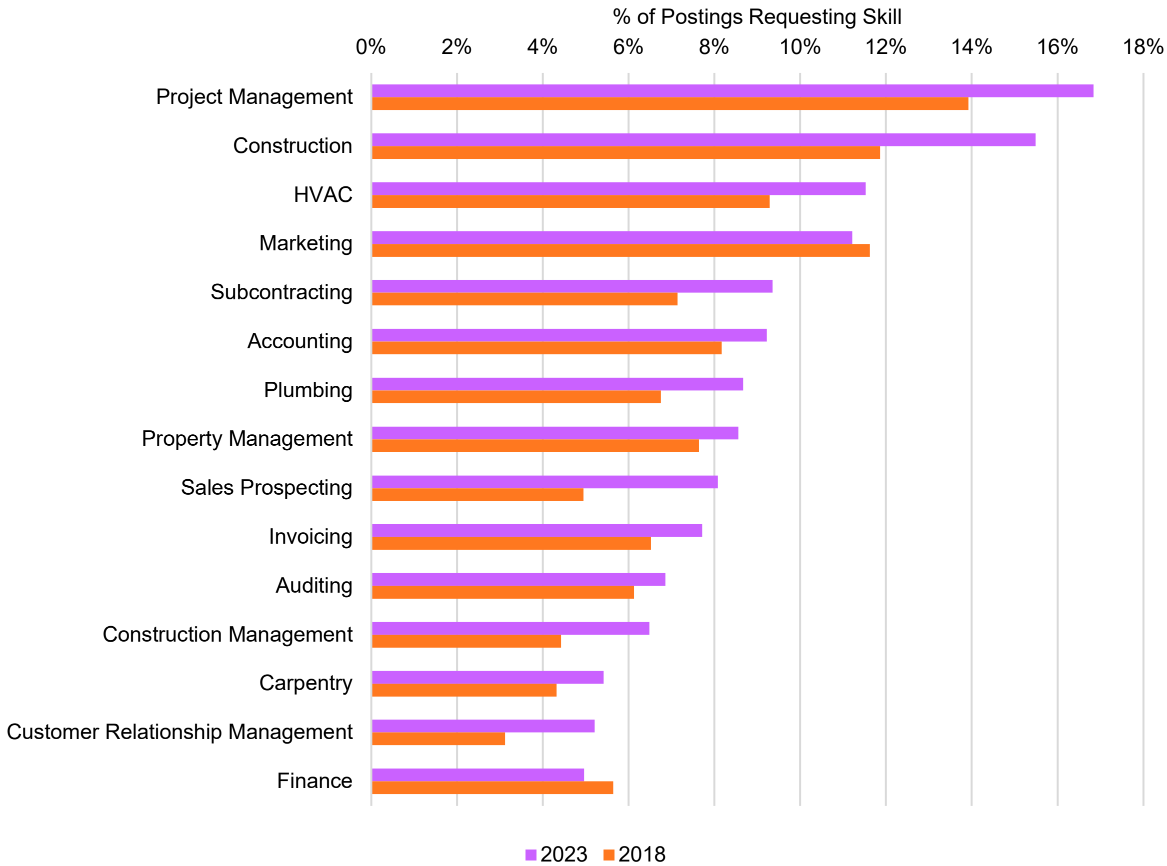
Skills

Understanding the top skills requested by employers in key industry clusters is important for identifying skills gaps, aligning training and educational programs to meet industry needs, promoting career pathways, and supporting collaborative industry partnership initiatives.

Figure 74 shows the change in employer demand for top Construction & Real Estate & Rental & Leasing skills measured by comparing the share of local job postings in the industry cluster that requested that skill in 2018 and 2023. Key skills that are growing in demand include Project Management, HVAC, Subcontracting, Plumbing, Sales Prospecting, Construction Management, and Customer Relationship Management.

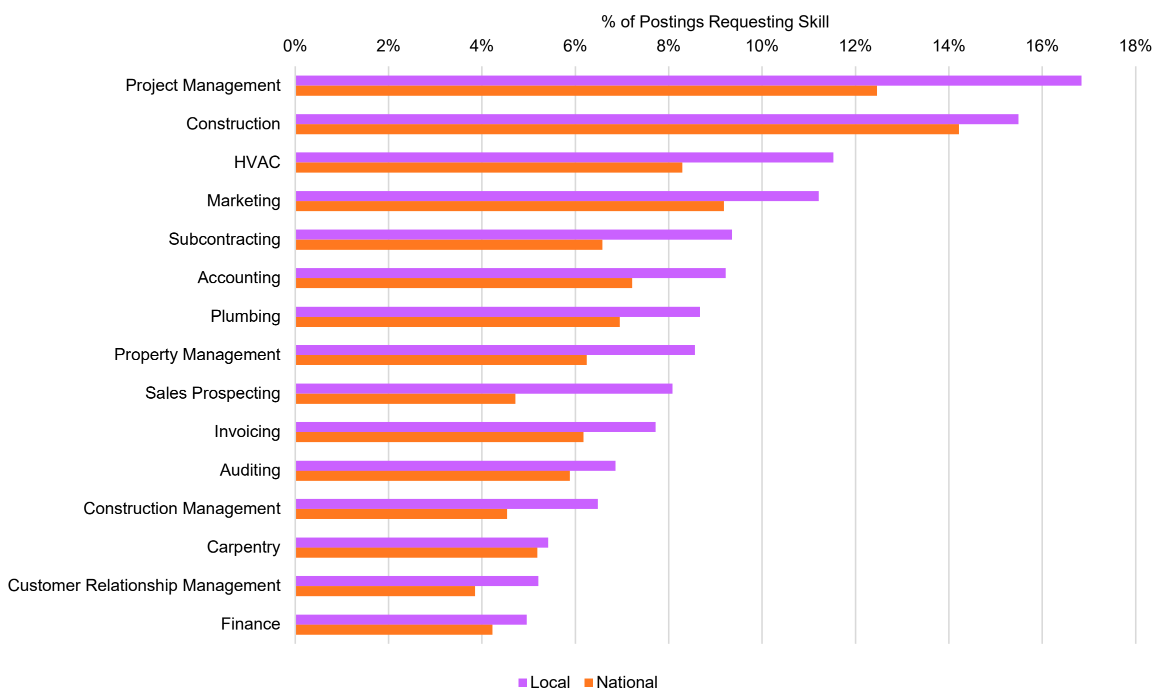
Figure 75 highlights differences in the regional (MSA) and national labor markets by comparing the percent of job postings that requested key skills in Washington, D.C. MSA versus the United States. As the chart shows, all of cluster's top skills are requested in a higher percentage of job postings in the Washington, D.C. MSA than in the United States overall, reflecting the relative strength and concentration of the industry, locally.

Figure 74 - Skill Demand Change of Top Cluster Skills, Washington DC MSA



Source: Lightcast

Figure 75 - Regional vs. National Skill Demand, Construction, Real Estate, Rental & Leasing Industry Cluster



Source: Lightcast

Industry Employer Feedback

Roundtable discussions were held June 24-25, 2024 with Employ Prince George's industry partners in order to solicit employer feedback on: (1) demand projections; (2) their top workforce challenges; (3) current and future skills demand; (4) the impacts of technology/automation; and (5) their perceptions of local workforce capacity, workforce partners/programs, and higher education/ training alignment with industry needs.

In line with the supply gap data above, employers in the Construction, Real Estate & Rental & Leasing industry cluster report the most difficulty sourcing qualified project managers/ construction managers. When recruiting for skilled positions, employers value experience over credentials/degrees although many contracts require staff with Apprentice licenses, journeyman licenses, or other credentials. Turnover is highest among laborers with less experience, with the perception that workers move on quickly after discovering the expectations of the job. Initiatives, such as the ACE program in K12 districts, were cited for expanding awareness of opportunities and the realities of working within Construction.

There was consensus across industry clusters on a shortage of "soft" skills in the local workforce, including reliability, communication, problem solving, and focus/attention to detail, especially in the younger generation since the COVID-19 pandemic. Of particular concern to employers is employees' mental health and high suicide rates within the Construction industry.

Absenteeism is an issue which can affect project timelines and safety at job sites. Employers value dependability and a willingness to continuously learn new skills on the job. A paradox exists where employees need soft skills in place to be able to learn new technical skills. New technologies, such as sensors and smart devices require new skills in the workforce.

Employers find value in community partnerships to train incumbent workers and prepare the emerging pipeline with soft skills and pre-apprenticeship training. Prince George's Community College was noted for having excellent programs, with interview preparation and ongoing support after placement. Robust onboarding, mentoring, and in-house skills training are important components for employee development in the Construction, Real Estate & Rental & Leasing industry cluster. One best practice shared is allowing for rotations that provide employees exposure to different business units and functions within the company.

Transportation, Warehousing, Repair, & Waste Management

Overview

For this analysis, a custom definition of the Transportation & Warehousing & Repair & Waste Management industry cluster includes the following NAICS industry classification codes:

NAICS 48-49: The Transportation and Warehousing sector includes industries involved in transporting passengers and cargo, storing goods, providing scenic and sightseeing transportation, and offering support activities related to various transportation modes which include air, rail, water, road, and pipeline.

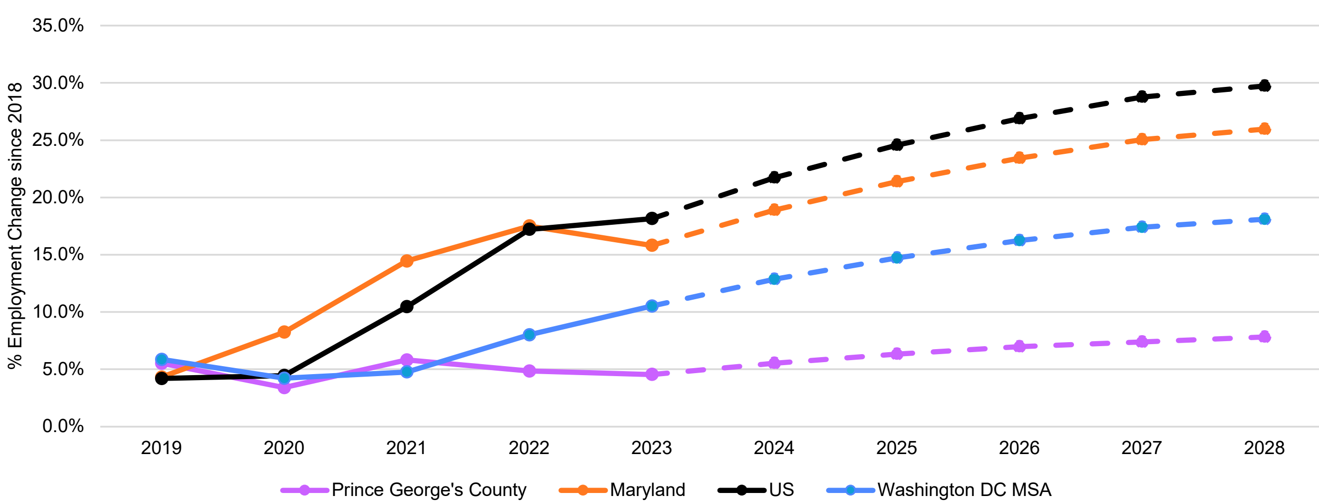
NAICS 811: The Repair and Maintenance subsector includes industries engaged in restoring machinery, equipment, and other products to operational condition. These business establishments also provide maintenance services to ensure optimal efficiency and prevent breakdowns and the need for repairs.

NAICS 562: The Waste Management and Remediation Services subsector consists of establishments engaged in various activities such as collecting, treating, and disposing of waste materials. This includes local hauling of waste, operating facilities that sort recyclables, offering remediation services for cleaning up contaminated areas like buildings, mine sites, soil, or groundwater, as well as providing septic pumping and other miscellaneous waste management services.

Employment Growth

As indicated in Figure 76 below, employment growth in the Transportation & Warehousing, Repair, & Waste Management sector in Prince George's County has tracked below the Washington DC MSA, the state of Maryland, and the United States since 2020. Cluster employment in Prince George's County is expected to grow steadily through 2028, but at a slower rate than the state of Maryland and the United States, which may further widen the gap in cluster performance at the county level. Prince George's County employers within this cluster will face ongoing competition for skilled talent, customers, and other business resources that support growth.

Figure 76 - Transportation & Warehousing, Repair, & Waste Management Industry Cluster Employment Growth Trends



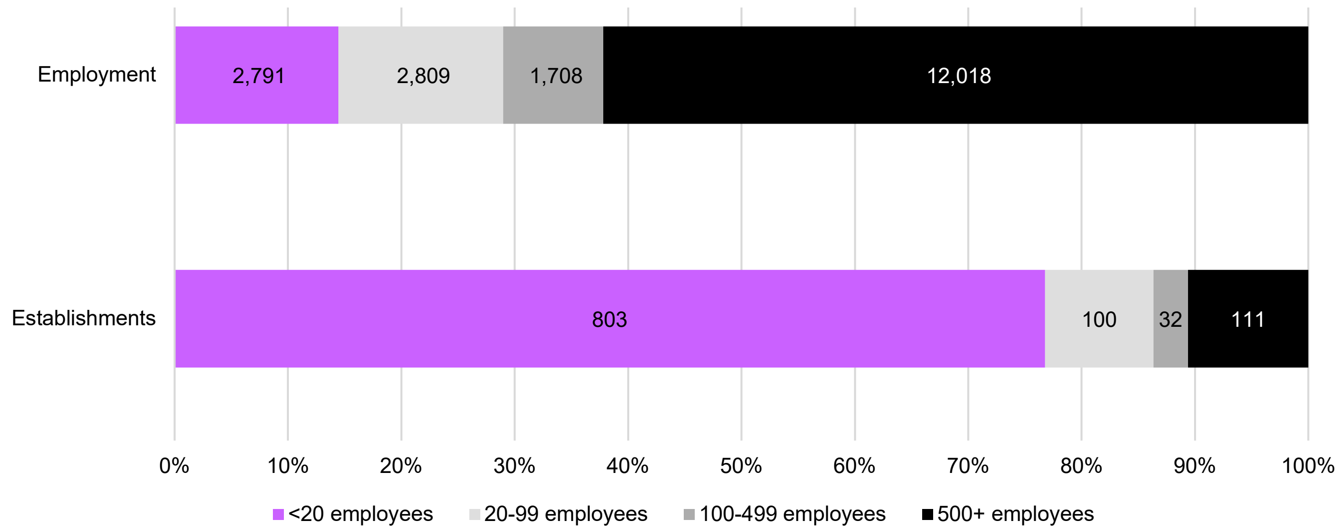
Source: Lightcast

Employment by Establishment Size

As Figures 77 and 78 below show, the distribution of employment and number of establishments by establishment size in the Transportation & Warehousing, Repair, & Waste Management cluster is similar between Prince George's County and MSA. There are 803 cluster establishments in the county (77% of the cluster total) that have fewer than 20 employees, while 11% of establishments in the cluster have 500 or more employees. Despite this, establishments of 500 or more employees account for an even greater share of total cluster employment (62%), the majority of employment share by establishment size. Establishments with fewer than 20 employees account for just 14% of total employment (roughly 2,791 employees).

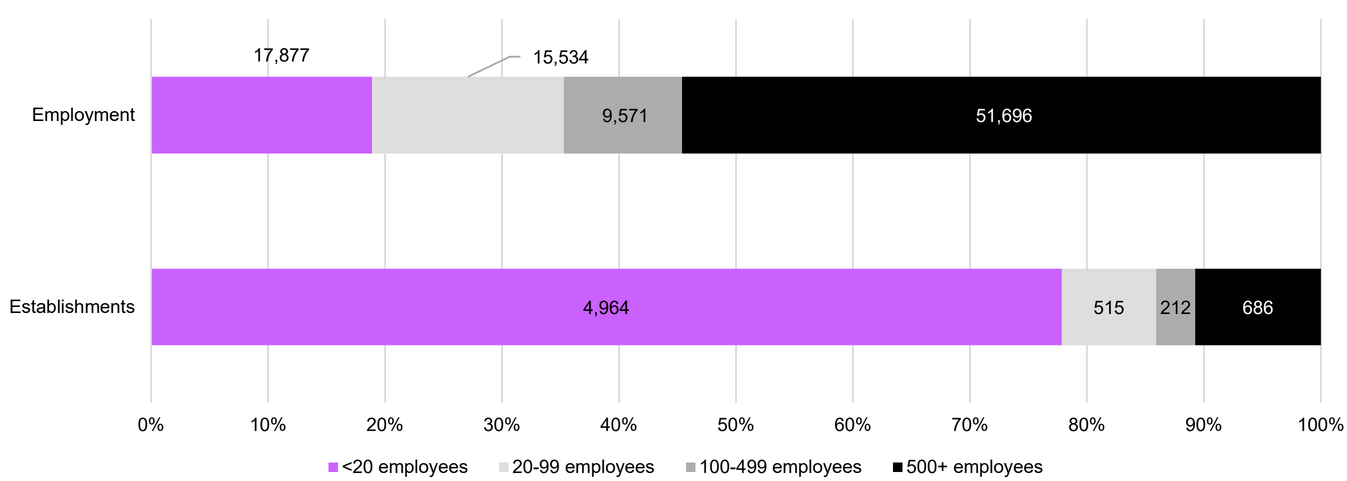
At the MSA level, roughly 78% of cluster establishments have fewer than 20 employees. Yet this establishment size only accounts for 17,877 employees, or 19% of total cluster employment. Establishments with 500 or more employees account for just 11% of total cluster establishments but almost 55% of cluster employment (51,696 employees).

Figure 77 - Employment and Establishments by Establishment Size, Transportation & Warehousing, Repair, & Waste Management Cluster, Prince George's County, 2020



Source: US Census Bureau

Figure 78 - Employment and Establishments by Establishment Size, Transportation & Warehousing, Repair, & Waste Management Cluster, Washington DC MSA, 2020



Source: US Census Bureau

Cluster Subsector Analysis

Subsector Key Metrics

Fifty (50) 6-digit industry subsectors comprise the Transportation & Warehousing, Repair, & Waste Management industry cluster in Prince George's County. See Table 43 below for the full list of industry subsectors, ranked by 2023 employment size. Included in Table 43 are each subsector's average earnings, total 2022 gross regional product (GRP) and the subsector's share of total GRP in the Transportation & Warehousing, Repair, & Waste Management industry cluster.

The subsectors encompass a wide range of industries including courier and express delivery services, general warehousing and storage, limousine service, freight trucking (local and long-distance), automotive repair, waste collection and remediation services, and more specialized services like septic tank services and hazardous waste treatment. Employment varies significantly across the subsectors. Couriers and Express Delivery Services employ the highest number of people (4,904 jobs), followed by General Warehousing and Storage (1,743 jobs). Average earnings also vary with subsectors like Rail Transportation ($108,200), Specialized Freight Trucking ($77,902), and Materials Recovery Facilities ($101,856) offering higher earnings compared to Taxi Service ($34,074) and Limousine Service ($33,615).

Table 43 - Transportation & Warehousing, Repair, & Waste Management Subsectors, Washington DC MSA

NAICS	Subsector	2023 Jobs	Average Earnings	2022 GRP	Share of Cluster GRP
492110	Couriers and Express Delivery Services	4,904	$56,448	$401,228,373	20.4%
493110	General Warehousing and Storage	1,743	$67,352	$132,794,040	6.7%
485320	Limousine Service	1,499	$33,615	$67,829,562	3.4%
484110	General Freight Trucking, Local	1,495	$68,363	$155,162,916	7.9%
562111	Solid Waste Collection	1,222	$65,830	$125,799,218	6.4%
811111	General Automotive Repair	1,075	$59,604	$96,450,885	4.9%
485310	Taxi Service	856	$34,074	$41,715,212	2.1%
492210	Local Messengers and Local Delivery	822	$45,347	$56,286,842	2.9%
485113	Bus and Other Motor Vehicle Transit Systems	730	$55,087	$35,303,424	1.8%
482110	Rail transportation	696	$108,200	$170,735,687	8.7%
811121	Automotive Body, Paint, and Interior Repair and Maintenance	632	$80,224	$69,342,386	3.5%
484121	General Freight Trucking, Long-Distance, Truckload	488	$72,547	$64,570,640	3.3%
811192	Car Washes	447	$38,037	$28,634,358	1.5%
488410	Motor Vehicle Towing	443	$56,326	$28,356,836	1.4%
562910	Remediation Services	429	$80,812	$58,437,744	3.0%
488119	Other Airport Operations	371	$130,741	$53,130,352	2.7%
484220	Specialized Freight (except Used Goods) Trucking, Local	364	$77,902	$37,078,203	1.9%
484210	Used Household and Office Goods Moving	336	$58,935	$25,037,700	1.3%
562119	Other Waste Collection	311	$62,288	$37,727,396	1.9%
811310	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	300	$88,398	$23,951,650	1.2%
485991	Special Needs Transportation	265	$68,723	$21,581,314	1.1%
485999	All Other Transit and Ground Passenger Transportation	243	$79,093	$28,633,891	1.5%
811114	Specialized Automotive Repair	195	$99,175	$23,013,420	1.2%
488510	Freight Transportation Arrangement	193	$65,691	$16,754,379	0.9%

NAICS	Subsector	2023 Jobs	Average Earnings	2022 GRP	Share of Cluster GRP
811210	Electronic and Precision Equipment Repair and Maintenance	182	$65,906	$16,755,189	0.9%
811191	Automotive Oil Change and Lubrication Shops	180	$50,188	$10,999,730	0.6%
488490	Other Support Activities for Road Transportation	172	$82,647	$18,381,365	0.9%
484122	General Freight Trucking, Long-Distance, Less Than Truckload	124	$71,691	$13,468,572	0.7%
485510	Charter Bus Industry	114	$58,402	$6,711,080	0.3%
488190	Other Support Activities for Air Transportation	107	$102,095	$14,576,777	0.7%
485210	Interurban and Rural Bus Transportation	92	$84,578	$7,907,841	0.4%
493120	Refrigerated Warehousing and Storage	87	$46,033	$5,144,161	0.3%
811122	Automotive Glass Replacement Shops	86	$58,784	$7,122,237	0.4%
811198	All Other Automotive Repair and Maintenance	83	$51,682	$6,970,682	0.4%
491110	Postal Service	70	$42,103	($598,235)	0.0%
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	58	$81,149	$6,842,346	0.3%
562920	Materials Recovery Facilities	55	$101,856	$10,419,836	0.5%
493130	Farm Product Warehousing and Storage	50	$37,277	$817,114	0.0%
562991	Septic Tank and Related Services	47	$87,440	$7,683,976	0.4%
562212	Solid Waste Landfill	47	$59,430	$6,439,272	0.3%
493190	Other Warehousing and Storage	42	$90,432	$5,663,122	0.3%
562211	Hazardous Waste Treatment and Disposal	37	$65,664	$4,886,190	0.2%
488999	All Other Support Activities for Transportation	32	$79,948	$3,837,292	0.2%
487210	Scenic and Sightseeing Transportation, Water	29	$19,332	$561,211	0.0%
487110	Scenic and Sightseeing Transportation, Land	28	$49,082	$805,175	0.0%
485410	School and Employee Bus Transportation	21	$47,383	$1,412,117	0.1%
488991	Packing and Crating	18	$45,002	$2,670,441	0.1%
562998	All Other Miscellaneous Waste Management Services	15	$108,614	$3,869,175	0.2%
481212	Nonscheduled Chartered Freight Air Transportation	12	$90,192	$4,786,067	0.2%
481219	Other Nonscheduled Air Transportation	11	$17,807	$527,640	0.0%

Source: Lightcast

Strong, Emerging, Threatened Subsectors

Lightcast's analysis includes an assessment of Transportation & Warehousing, Repair, & Waste Management industry subsectors relative to their concentration in the county or the MSA and the projected growth/decline in jobs and concentration.

At the county level, strong industry subsectors are defined as having a location quotient (LQ) of 1.1 or higher in 2023 and projected job growth of > 20 jobs by 2028. At the MSA level, strong industry subsectors are defined as having a location quotient (LQ) of 1.1 or higher in 2023 and projected job growth of > 100 jobs by 2028.

Table 44 - STRONG Transportation & Warehousing, Repair, & Waste Management Industry Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
482110	Rail transportation	481111	Scheduled Passenger Air Transportation
484110	General Freight Trucking, Local	485111	Mixed Mode Transit Systems
485113	Bus and Other Motor Vehicle Transit Systems	485113	Bus and Other Motor Vehicle Transit Systems
485310	Taxi Service	485310	Taxi Service
485320	Limousine Service	485320	Limousine Service
488490	Other Support Activities for Road Transportation	488119	Other Airport Operations
491110	Postal Service	491110	Postal Service
492110	Couriers and Express Delivery Services	492210	Local Messengers and Local Delivery
492210	Local Messengers and Local Delivery	562119	Other Waste Collection
562111	Solid Waste Collection		
562119	Other Waste Collection		

Source: Lightcast

At the county level, emerging industry subsectors are defined as having a location quotient (LQ) between 0.90 and 1.1, a growing LQ, and projected growth of at least 20 jobs by 2028. At the MSA level, emerging industry subsectors are defined as having a location quotient (LQ) between 0.90 and 1.1, a growing LQ, and projected growth of at least 100 jobs by 2028.

Table 45 - EMERGING Transportation & Warehousing, Repair, & Waste Management Industry Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
811490	Other Personal and Household Goods Repair and Maintenance	811198	All Other Automotive Repair and Maintenance

Source: Lightcast

At the county level, threatened industry subsectors are defined as having a location quotient (LQ) of .90 or lower in 2023 and projected job decline of 20 or more jobs by 2028. At the MSA level, threatened industry subsectors are defined as having a location quotient (LQ) of .90 or lower in 2023 and projected job decline of 100 or more jobs by 2028.

Table 46 - THREATENED Transportation & Warehousing, Repair, & Waste Management Industry Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
484210	Used Household and Office Goods Moving	484210	Used Household and Office Goods Moving
485999	All Other Transit and Ground Passenger Transportation		
811111	General Automotive Repair		
811121	Automotive Body, Paint, and Interior Repair and Maintenance		
811191	Automotive Oil Change and Lubrication Shops		
811192	Car Washes		

Source: Lightcast

Subsectors with High Concentration

In Prince George's County, several Transportation & Warehousing, Repair, & Waste Management subsectors have significant employment concentrations, indicating that a larger proportion of the workforce is employed in that subsector in the county as compared to the average region. A high concentration of jobs indicates potential areas of strength and specialization within the cluster, including Bus and Other Motor Vehicle Transit Systems with an employment concentration of 9.46, Other Waste Collection (8.12), Limousine (4.25), Taxi Service (3.80), and Solid Waste Collection (3.00).

Table 47 - Subsectors with High Concentration of Employment, Transportation & Warehousing, Repair, & Waste Management, Prince George's County

Industry Subsector	2023 Jobs	2023 Employment Concentration
Bus and Other Motor Vehicle Transit Systems	730	9.46
Other Waste Collection	311	8.12
Limousine Service	1,499	4.25
Taxi Service	856	3.80
Solid Waste Collection	1,222	3.00
All Other Transit and Ground Passenger Transportation	243	2.92
Interurban and Rural Bus Transportation	92	2.82
Motor Vehicle Towing	443	2.33
Charter Bus Industry	114	2.32
Couriers and Express Delivery Services	4,904	2.24
Farm Product Warehousing and Storage	50	2.22
Postal Service	70	2.13

Source: Lightcast

Occupations & Skills

Top Occupations

Table 48 lists the top 20 Transportation & Warehousing, Repair, & Waste Management occupations in Prince George's County. Together, these occupations account for nearly 78% of all cluster employment. The table provides employment level trends by occupation within the cluster between 2018 - 2023, and projected employment by 2028 to identify growth trends and the potential for workforce strategies to address anticipated demand growth (or decline). The table also includes the number of people employed in that occupation in all industries in the county. This indicates the level of competition employers may face from industries outside the Transportation & Warehousing, Repair, & Waste Management cluster when hiring for key occupations.

Light Truck Drivers and Heavy and Tractor-Trailer Truck Drivers lead cluster employment, reflecting the county's reliance on transportation services, with strong projected growth rates indicating sustained demand. Courier and Messenger roles grew a remarkable 165% between 2018 and 2023, underscoring the rise of delivery services in response to e-commerce growth.

Declines are observed in several occupations, including Bus Drivers, Transit and Intercity, and Shuttle Drivers and Chauffeurs, possibly influenced by shifts in public transportation needs or operational changes.

Table 48 - Top 20 Transportation & Warehousing, Repair, & Waste Management Occupations, Prince George's County

Occupation	Employed in Cluster 2023	% Change 2018 - 2023	Projected % Change 2023 - 2028	% of Total Jobs in Industry 2023	All Jobs for Occupation in MSA 2023	County Resident Workers 2023
Light Truck Drivers	3,033	61%	7%	13.8%	19,588	3,639
Heavy and Tractor-Trailer Truck Drivers	2,975	21%	8%	13.6%	23,131	3,793
Taxi Drivers	2,017	(3%)	10%	9.2%	9,371	2,038
Laborers and Freight, Stock, and Material Movers, Hand	1,857	(24%)	0%	8.5%	23,830	4,192
Automotive Service Technicians and Mechanics	863	(4%)	(2%)	3.9%	14,306	1,957
Bus Drivers, Transit and Intercity	804	(29%)	3%	3.7%	5,384	992
General and Operations Managers	612	75%	2%	2.8%	102,617	14,515
First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors	598	(22%)	1%	2.7%	9,569	1,524
Couriers and Messengers	585	165%	22%	2.7%	3,782	688
Cleaners of Vehicles and Equipment	475	(7%)	(3%)	2.2%	6,383	964
Stockers and Order Fillers	464	129%	(19%)	2.1%	40,929	6,063
Refuse and Recyclable Material Collectors	443	21%	6%	2.0%	2,180	477
Industrial Truck and Tractor Operators	409	40%	(15%)	1.9%	4,132	925
Shuttle Drivers and Chauffeurs	327	(55%)	(10%)	1.5%	5,016	754
Bus and Truck Mechanics and Diesel Engine Specialists	311	(13%)	5%	1.4%	3,752	642
Automotive Body and Related Repairers	310	(5%)	(6%)	1.4%	2,548	366
Shipping, Receiving, and Inventory Clerks	262	48%	(9%)	1.2%	12,192	1,463
Customer Service Representatives	238	(9%)	(3%)	1.1%	43,267	5,771
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	222	(25%)	(5%)	1.0%	42,194	7,331
Dispatchers, Except Police, Fire, and Ambulance	222	6%	4%	1.0%	3,264	510

Source: Lightcast

Occupational Supply & Demand

Table 49 provides insight into the supply and demand dynamics for various occupations within the Transportation & Warehousing, Repair, & Waste Management industry cluster in Prince George's County. The table highlights occupations where there is a significant gap between the estimated active supply (the number of individuals currently employed or available in the workforce) and the estimated active demand (the number of positions currently needed by employers).

Heavy and Tractor-Trailer Truck Drivers face the largest gap with an estimated supply of only 907 individuals compared to active demand for 2,231 positions, resulting in a deficit of 1,324 drivers. While demand for Secretaries and Administrative Assistant is projected to decline long-term, they are currently undersupplied in the county (estimated 1,174 deficit). Understanding these supply-demand gaps is crucial for aligning education programming, training, upskilling, and reskilling initiatives, and recruitment strategies to address the most critical labor market imbalances within key industry clusters.

Table 49 – Transportation & Warehousing, Repair, & Waste Management Industry Cluster Largest Occupation Supply Gaps, Prince George's County

Occupation	Active Supply Estimate	Active Demand Estimate	Supply / Demand Gap
Heavy and Tractor-Trailer Truck Drivers	907	2,231	(1,324)
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	2,438	3,612	(1,174)
Automotive Service Technicians and Mechanics	395	1,142	(747)
Laborers and Freight, Stock, and Material Movers, Hand	827	1,407	(580)
Bus and Truck Mechanics and Diesel Engine Specialists	116	442	(325)
Customer Service Representatives	2,638	2,863	(224)
Stockers and Order Fillers	1,322	1,466	(144)
Automotive Body and Related Repairers	73	176	(103)

Source: Lightcast

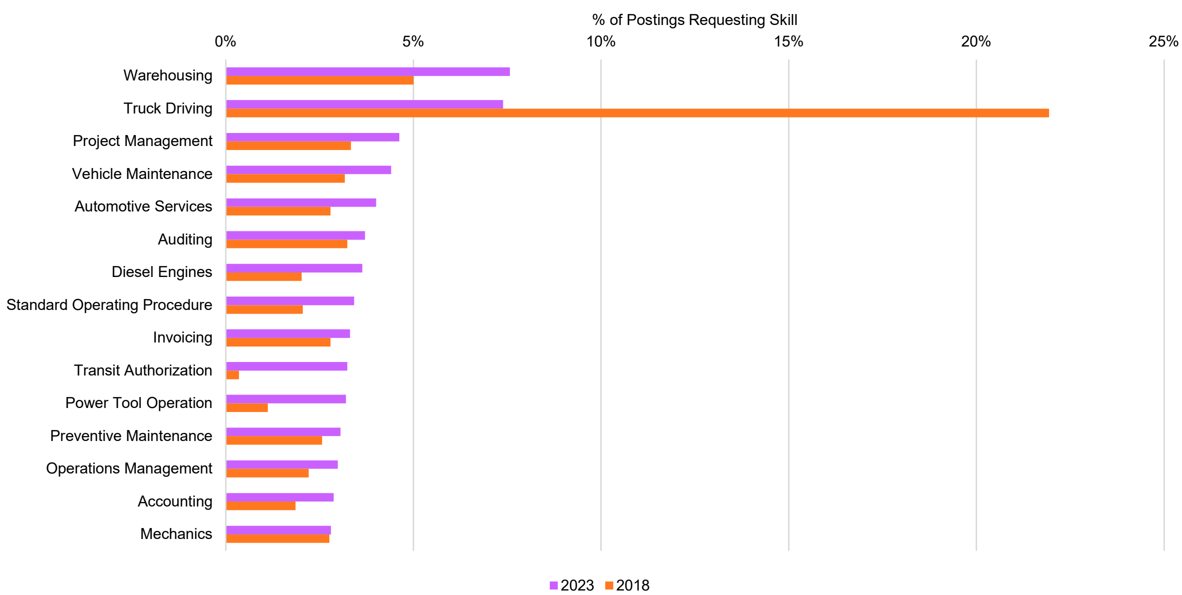
Skills

Understanding the top skills requested by employers in key industry clusters is important for identifying skills gaps, aligning training and educational programs to meet industry needs, promoting career pathways, and supporting collaborative industry partnership initiatives.

Figure 79 shows the change in employer demand for top Transportation & Warehousing, Repair, & Waste Management skills measured by comparing the percent of local job postings in the industry cluster that requested that skill in 2018 and 2023. Most notable is the decline in Truck Driving, requested in 22% of 2018 job postings and only 7% in 2023. Emerging skills in the cluster include Warehousing, Project Management, Vehicle Maintenance, Automotive Services, Diesel Engines, Transit Authorization, and Power Tool Operation.

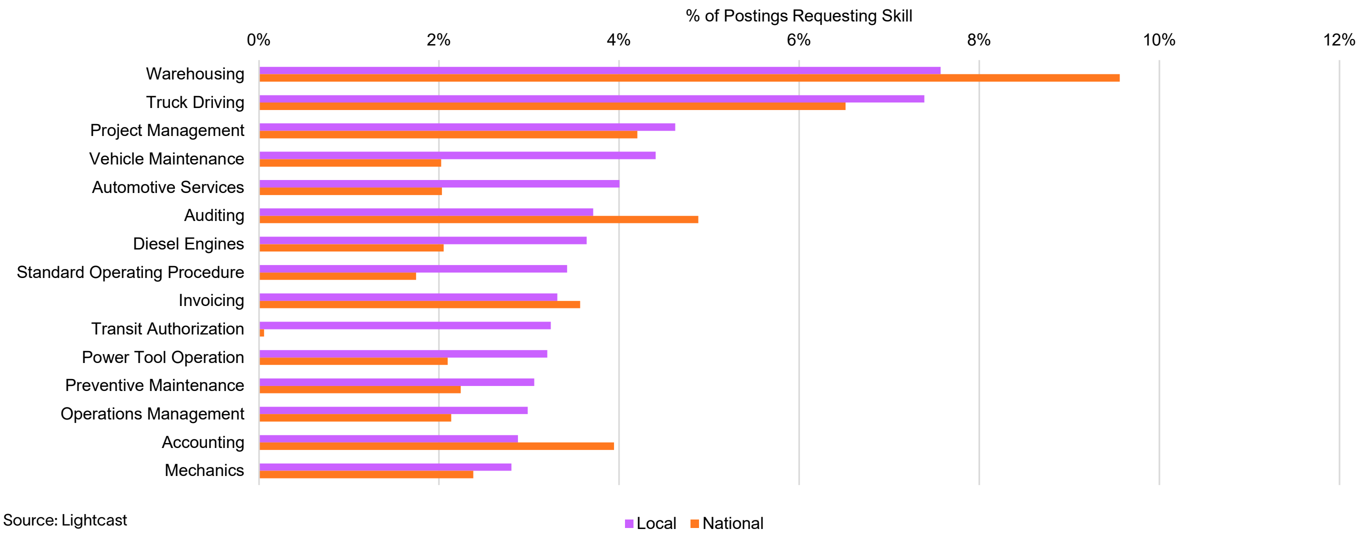
Figure 80 highlights differences in the regional (MSA) and national labor markets by comparing the percent of job postings that requested key skills in Washington, D.C., MSA versus the United States. As the chart shows, demand for Vehicle Maintenance, Automotive Services, and Diesel Engines is higher in the Washington, D.C. MSA than the United States overall.

Figure 79 - Skill Demand Change of Top Cluster Skills, Washington DC MSA



Source: Lightcast

Figure 80 - Regional vs. National Skill Demand, Transportation & Warehousing, Repair, & Waste Management Industry Cluster



Source: Lightcast

Industry Employer Feedback

Roundtable discussions were held June 24-25, 2024, with Employ Prince George's industry partners in order to solicit employer feedback on: (1) demand projections; (2) their top workforce challenges; (3) current and future skills demand; (4) the impacts of technology/automation; and (5) their perceptions of local workforce capacity, workforce partners/programs, and higher education/ training alignment with industry needs.

Employers representing the Transportation & Warehousing, Repair, & Waste Management industry cluster find it difficult to recruit and retain mechanics and fleet maintenance workers, especially those with electrical/mechatronic skills. Overall, they face more challenges securing mid-level and highly skilled talent than entry-level workers. Workforce agencies like Employ Prince George's have been instrumental in assisting employers with sourcing entry-level workers such as warehouse staff and bus drivers.

A shortage of soft skills, noted across the industry conversations, may be magnified by language barriers and cultural differences in the Transportation & Warehousing, Repair, & Waste Management cluster. Employers cite a large percentage of their workforce as non-native English speakers / immigrants. One of the more common disconnects is the emphasis on safety in US workplaces, and the impact of maintenance on safety.

Roles with highest turnover tend to be manual roles within the warehouse Employers feel the manual nature of many jobs in this industry cluster, including maintenance and repair, are "out of favor" with the younger workforce, who prefer to work with technology. There has been little to no reported impact from automation in this cluster and employers do not see technological changes coming in the near future.

To bridge the gap between young people and opportunities in the industry, employers advocated for the revitalization of Career and Technical Education (CTE) in regional school districts, particularly automotive technology programs. However, hiring out of high school is less common as companies prefer experience and, in some cases, require applicants to be 21.

Employers tap into unemployed and underemployed talent pools with the help of community partners. Through community partners, there are ample local opportunities for training, including on-the-job training for incumbent workers and registered apprenticeship programs approved by the state of Maryland. One employer suggested new training programs related to electric vehicle maintenance and repair, as fleets are anticipated to be 100% electrical by 2030.

Information & Computers

Overview

For this analysis, a custom definition of the Information & Computers industry cluster includes the following NAICS industry classification codes:

NAICS 51: The Information sector encompasses establishments involved in several key activities: producing and disseminating information and cultural products, facilitating the transmission and distribution of these products, data, or communications, and processing data. This sector includes:

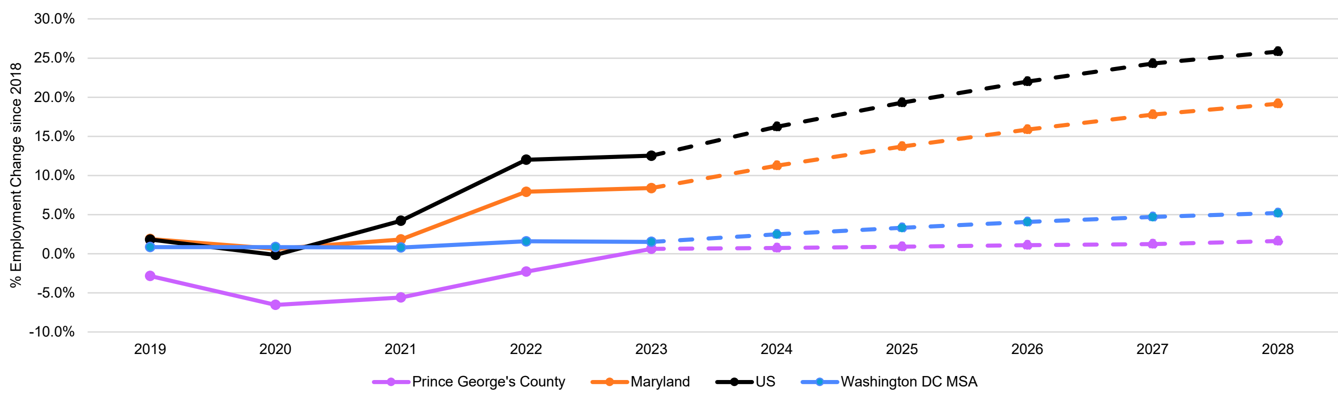
- Publishing industries, encompassing software publishing, traditional publishing, and online publishing.
- Motion picture and sound recording industries.
- Broadcasting industries, covering traditional broadcasting and online broadcasting.
- Telecommunications industries.
- Web search portals, data processing industries, and information services industries.

NAICS 5415: The Computer Systems Design and Related Services sector encompasses establishments providing expertise in information technology through various activities. These include writing, modifying, testing, and supporting software tailored to specific customer needs, including custom video design, Internet webpage development, and designing computer systems integrating hardware, software, and communication technologies. Services also include on-site management of clients' computer and data processing facilities, offering advice in information technology, and other professional and technical computer-related services such as training and post-sales support.

Employment Growth

As Figure 81 shows below, employment growth in the Information & Computers sector in Prince George's County has tracked below the Washington DC MSA, the state of Maryland, and the United States since 2018. Cluster employment in Prince George's County is expected to remain flat through 2028, while modest growth is projected in the MSA. In contrast, the state of Maryland and the United States are projected to see more rapid and significant growth, which may further widen the gap in cluster performance at the county and MSA levels. Prince George's County employers within this cluster will face ongoing competition for skilled talent, customers, and other business resources that support growth.

Figure 81 – Information & Computers Employment Growth Trend, 2019-2028



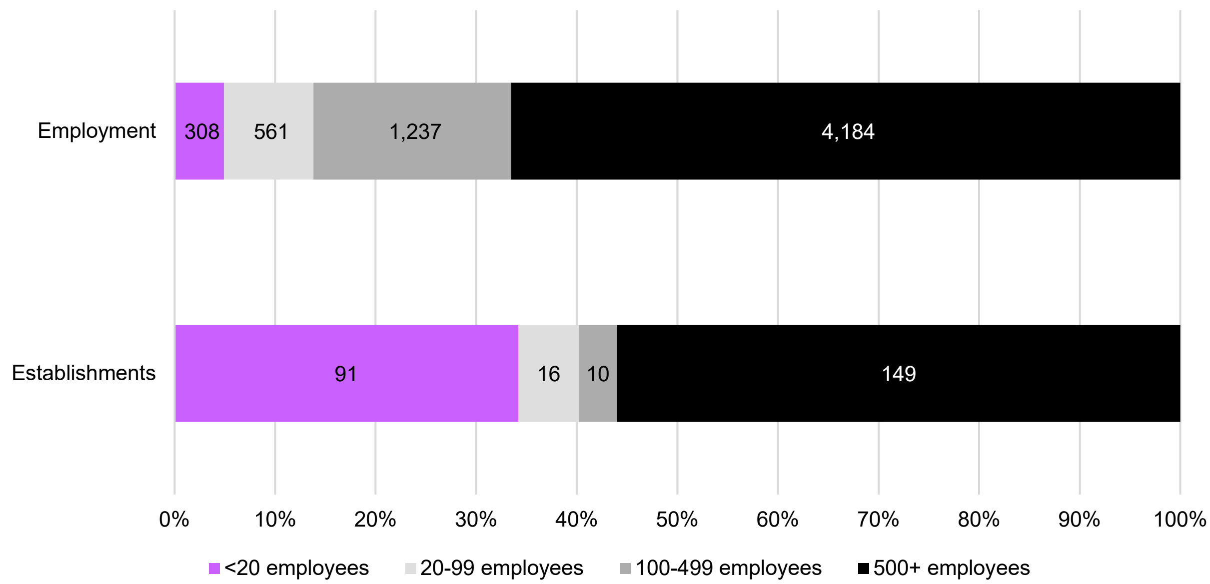
Source: Lightcast

Employment by Establishment Size

As Figures 82 and 83 show, the distribution of employment and number of establishments by establishment size in the Information & Computers cluster is similar between Prince George's County and the MSA. This cluster is unique in that the majority of establishments are large (500+ employees), whereas typically small establishments are greatest in number. There are 91 cluster establishments in Prince George's County (34% of the cluster total) that have fewer than 20 employees, while 56% of establishments in the cluster have 500 or more employees. Despite this, establishments of 500 or more employees account for an even greater share of total cluster employment (67%). Establishments with fewer than 20 employees account for just 5% of total employment (roughly 300 employees).

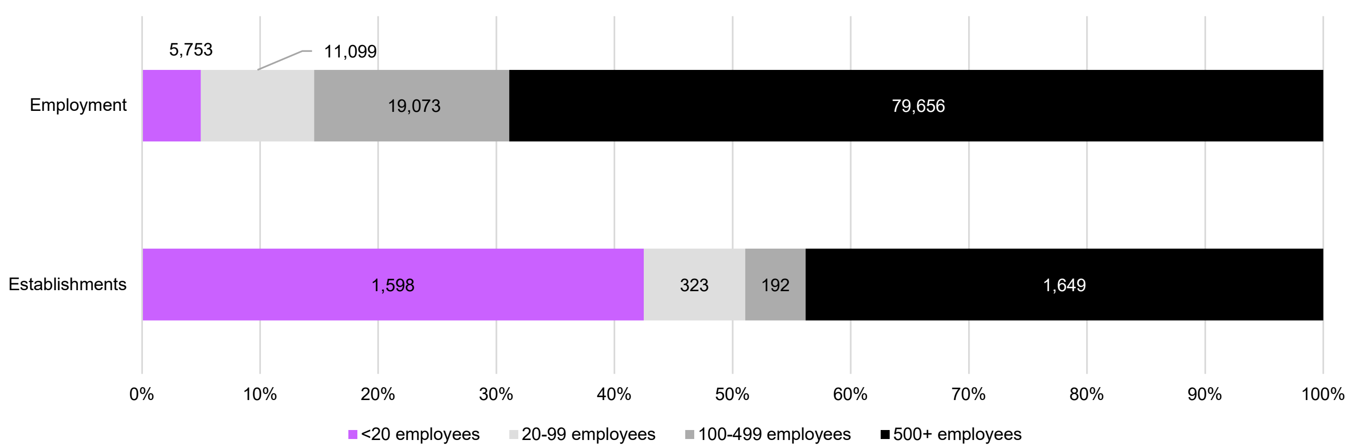
At the MSA level, roughly 42% of cluster establishments have fewer than 20 employees. Yet this establishment size only accounts for 5,753 employees, or 5% of total cluster employment. Establishments with 500 or more employees account for just 44% of total cluster establishments but almost 70% of cluster employment (79,656 employees).

Figure 82 – Information & Computers Employment and Establishments by Establishment Size, Prince George's County, 2020



Source: US Census Bureau

Figure 83 – Information & Computers Employment and Establishments by Establishment Size, Washington DC MSA, 2020



Source: US Census Bureau

Cluster Subsector Analysis

Subsector Key Metrics

Thirty-two (32) 6-digit industry subsectors make up the Information & Computers industry cluster in the Washington DC Metropolitan Statistical Area (MSA). See Table 50 below for the full list of industry subsectors, ranked by 2023 employment size. Included in Table 50 are each subsector's average earnings, total 2022 gross regional product (GRP) and the subsector's share of total GRP in the Information and Computers industry cluster.

The largest subsectors by job count include Computer Systems Design Services (114,280 jobs) and Custom Computer Programming Services (51,305 jobs). These sectors also show substantial average earnings, with Custom Computer Programming Services having the highest at $174,890. Computer Systems Design Services also contributes significantly to the GRP with $23.68 billion, representing 31.4% of the cluster's total GRP. Other major contributors include Custom Computer Programming Services, Data Processing, Hosting, and Related Services, and Wired Telecommunications Carriers. Sectors like Web Search Portals and All Other Information Services, Media Streaming Distribution Services, and Software Publishers demonstrate notable growth potential, indicated by their substantial contributions to the GRP relative to their job numbers. Smaller sectors, such as Motion Picture and Video Production or Satellite Telecommunications, though fewer in job count, often offer higher average earnings per job, suggesting niche opportunities within specialized fields.

Table 50 – Information & Computers Subsectors, Washington DC MSA

NAICS	Subsector	2023 Jobs	Average Earnings	2022 GRP	Share of Cluster GRP
541512	Computer Systems Design Services	114,280	$167,061	$23,678,728,975	31.4%
541511	Custom Computer Programming Services	51,305	$174,890	$11,456,089,593	15.2%
518210	Data Processing, Hosting, and Related Services	17,585	$209,705	$8,461,409,080	11.2%
517111	Wired Telecommunications Carriers	10,744	$178,593	$7,466,610,405	9.9%
541519	Other Computer Related Services	10,373	$155,625	$2,598,404,916	3.4%
513210	Software Publishers	9,742	$214,398	$5,115,874,201	6.8%
516210	Media Streaming Distribution Services, Social Networks, and Other Media Networks and Content Providers	7,373	$199,357	$4,743,461,771	6.3%
513110	Newspaper Publishers	4,661	$140,790	$1,116,379,671	1.5%
513120	Periodical Publishers	3,818	$137,601	$885,106,343	1.2%
541513	Computer Facilities Management Services	3,489	$128,724	$537,518,168	0.7%
516120	Television Broadcasting Stations	3,274	$183,994	$1,324,382,694	1.8%
519290	Web Search Portals and All Other Information Services	3,128	$192,200	$1,378,593,519	1.8%
512110	Motion Picture and Video Production	2,910	$102,119	$538,105,738	0.7%
517810	All Other Telecommunications	2,437	$240,622	$1,047,649,412	1.4%
512131	Motion Picture Theaters (except Drive-Ins)	2,094	$27,433	$92,124,111	0.1%
517112	Wireless Telecommunications Carriers (except Satellite)	1,826	$162,490	$2,311,762,137	3.1%
513199	All Other Publishers	1,543	$182,592	$783,414,645	1.0%
513130	Book Publishers	1,245	$101,799	$387,926,879	0.5%
517410	Satellite Telecommunications	896	$207,288	$306,842,940	0.4%
517121	Telecommunications Resellers	889	$210,644	$348,799,636	0.5%
516110	Radio Broadcasting Stations	871	$96,317	$289,981,487	0.4%
519210	Libraries and Archives	373	$79,625	$34,004,163	0.0%
512240	Sound Recording Studios	323	$108,303	$127,285,961	0.2%
513140	Directory and Mailing List Publishers	279	$123,752	$104,204,362	0.1%

NAICS	Subsector	2023 Jobs	Average Earnings	2022 GRP	Share of Cluster GRP
512191	Teleproduction and Other Postproduction Services	253	$70,590	$36,973,180	0.0%
512199	Other Motion Picture and Video Industries	210	$134,944	$48,972,166	0.1%
512290	Other Sound Recording Industries	187	$84,847	$68,477,565	0.1%
512230	Music Publishers	78	$50,649	$17,816,499	0.0%
512250	Record Production and Distribution	74	$51,945	$31,077,795	0.0%
512120	Motion Picture and Video Distribution	44	$108,898	$5,469,205	0.0%
513191	Greeting Card Publishers	21	$93,471	$5,416,401	0.0%
512132	Drive-In Motion Picture Theaters	<10	Insf.Data	$268,153	0.0%

Source: Lightcast

Strong, Emerging, & Threatened Subsectors

Lightcast's analysis includes an assessment of Information and Computers industry subsectors relative to their concentration in the county or the MSA and the projected growth/decline in jobs and concentration.

At the county level, strong industry subsectors are defined as having a location quotient (LQ) of 1.1 or higher in 2023 and projected job growth of > 20 jobs by 2028. At the MSA level, strong industry subsectors are defined as having a location quotient (LQ) of 1.1 or higher in 2023 and projected job growth of > 100 jobs by 2028.

Table 51 – STRONG Cluster Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
513130	Book Publishers	516120	Television Broadcasting Stations
517112	Wireless Telecommunications Carriers (except Satellite)	517410	Satellite Telecommunications
541512	Computer Systems Design Services	518210	Data Processing, Hosting, and Related Services
541519	Other Computer Related Services	541511	Custom Computer Programming Services
		541512	Computer Systems Design Services
		541513	Computer Facilities Management Services
		541519	Other Computer Related Services

Source: Lightcast

At the county level, emerging industry subsectors are defined as having a location quotient (LQ) between 0.90 and 1.1, a growing LQ, and projected growth of at least 20 jobs by 2028. At the MSA level, emerging industry subsectors are defined as having a location quotient (LQ) between 0.90 and 1.1, a growing LQ, and projected growth of at least 100 jobs by 2028.

Table 52 – EMERGING Cluster Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
517810	All Other Telecommunications	516110	Radio Broadcasting Stations

Source: Lightcast

At the county level, threatened industry subsectors are defined as having a location quotient (LQ) of .90 or lower in 2023 and projected job decline of 20 or more jobs by 2028. At the MSA level, threatened industry subsectors are defined as having a location quotient (LQ) of .90 or lower in 2023 and projected job decline of 100 or more jobs by 2028.

Table 53 – THREATENED Cluster Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
541511	Custom Computer Programming Services	513120	Periodical Publishers
		516210	Media Streaming Distribution Services, Social Networks, and Other Media Networks and Content Providers
		517111	Wired Telecommunications Carriers
		517121	Telecommunications Resellers
		517810	All Other Telecommunications

Source: Lightcast

Subsectors with High Concentration

In the Washington-Arlington-Alexandria MSA, various subsectors within the Information and Computers cluster have significant employment concentrations, indicating that a larger proportion of the workforce is employed in that subsector in the MSA as compared to the average region. The high concentration of jobs in certain subsectors indicates potential areas of strength and specialization within the Information and Computers sector, including Computer Systems Design with an employment concentration of 4.49, Satellite Telecommunications (4.43) and Other Computer Related Services (3.30).

Table 54 - Information & Computers Subsectors with High Concentration of Employment, Washington DC MSA

Industry Subsector	2023 Jobs	2023 Employment Concentration
Computer Systems Design Services	114,280	4.49
Satellite Telecommunications	896	4.43
Other Computer Related Services	10,373	3.30
Other Motion Picture and Video Industries	210	2.47
All Other Telecommunications	2,437	2.39
Periodical Publishers	3,818	2.30
Television Broadcasting Stations	3,274	2.28
Newspaper Publishers	4,661	2.11
Custom Computer Programming Services	51,305	2.04
Computer Facilities Management Services	3,489	1.94
Other Sound Recording Industries	187	1.73
Data Processing, Hosting, and Related Services	17,585	1.70
Media Streaming Distribution Services, Social Networks, and Other Media Networks and Content Providers	7,373	1.42

Source: Lightcast

Occupations & Skills

Top Occupations

Table 55 lists the top 20 Information and Computers occupations in the Washington-Arlington-Alexandria MSA. Together, these occupations account for 68% of all cluster employment. The table provides employment level trends by occupation within the cluster between 2018 - 2023, and projected employment by 2028 to identify growth trends and the potential for workforce strategies to address anticipated demand growth (or decline). The table also includes the number of people employed in that occupation in all industries in the MSA. This indicates the level of competition employers may face from industries outside the Information and Computers cluster when hiring for key occupations.

With 51,269 jobs in 2023, Software Developers represent 20% of all jobs in the industry, with significant growth (+26%) from 2018 to 2023 and additional 9% growth projected by 2028. This indicates strong demand and a pivotal role within the cluster. While there is still a high volume of Computer Systems Analysts in the region (11,538), a 30% decline since 2018 may indicate instability, technological change, or other market disruptions. However, modest 3% growth is projected by 2028.

Table 55 – Top 20 Information & Computers Cluster Occupations

Occupation	Employed in Cluster 2023	% Change 2018 - 2023	Projected % Change 2023 - 2028	% of Total Jobs in Industry 2023	All Jobs for Occupation in MSA 2023	County Resident Workers 2023
Software Developers	51,269	26%	9%	20.0%	72,157	4,653
Computer Systems Analysts	11,538	(30%)	3%	4.5%	20,461	1,916
Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	10,383	15%	(2%)	4.1%	31,692	3,481
Computer User Support Specialists	10,068	(4%)	5%	3.9%	19,448	1,890
Computer and Information Systems Managers	8,951	5%	6%	3.5%	19,453	2,198
Information Security Analysts	8,608	26%	12%	3.4%	17,277	1,305
Management Analysts	8,182	26%	1%	3.2%	81,519	7,556
General and Operations Managers	8,046	35%	3%	3.1%	102,617	14,515
Computer Occupations, All Other	6,992	(18%)	3%	2.7%	39,972	6,390
Project Management Specialists	6,353	81%	5%	2.5%	34,742	4,351
Network and Computer Systems Administrators	5,952	(35%)	0%	2.3%	13,942	1,365
Software Quality Assurance Analysts and Testers	5,901	(14%)	6%	2.3%	8,672	918
Computer Network Architects	5,844	0%	(2%)	2.3%	9,819	920
Customer Service Representatives	4,922	(21%)	(3%)	1.9%	43,267	5,771
Computer Network Support Specialists	3,959	(8%)	(1%)	1.5%	7,469	952
Market Research Analysts and Marketing Specialists	3,821	(4%)	6%	1.5%	22,872	2,369
Database Architects	3,689	139%	1%	1.4%	5,539	272
Managers, All Other	3,431	11%	3%	1.3%	54,079	7,921
Editors	3,357	(14%)	(1%)	1.3%	6,417	745
Business Operations Specialists, All Other	2,995	314%	0%	1.2%	78,940	12,209

Source: Lightcast

Occupational Supply & Demand

Table 43 provides insight into the supply and demand dynamics for various occupations within the Information and Computers industry cluster in the Washington-Arlington-Alexandria MSA. The table highlights occupations where there is a significant gap between the estimated active supply (the number of individuals currently employed or available in the workforce) and the estimated active demand (the number of positions currently needed by employers).

Software Developers face the largest gap with an estimated supply of 2,983 individuals compared to a demand of 13,747 positions, indicating a substantial deficit of 10,764 professionals. An estimated shortage of 3,989 Information Security Analysts could be a threat to the region's strength in the Government sector, where cybersecurity is imperative. Understanding these supply-demand gaps is crucial for aligning education programming, training initiatives, and recruitment strategies to address the most critical labor market imbalances within key industry clusters.

Table 56 – Information & Computers Cluster Largest Occupation Supply Gaps, Washington DC MSA

Occupation	**Active Supply Estimate**	**Active Demand Estimate**	**Supply / Demand Gap**
Software Developers	2,983	13,747	(10,764)
Computer Occupations, All Other	1,501	10,325	(8,824)
Managers, All Other	3,638	7,674	(4,036)
Information Security Analysts	702	4,691	(3,989)
Management Analysts	2,485	4,816	(2,332)
Computer User Support Specialists	1,323	3,385	(2,061)
Computer Systems Analysts	982	3,022	(2,039)
Network and Computer Systems Administrators	679	2,708	(2,029)
Computer Network Architects	261	2,045	(1,784)
Project Management Specialists	1,189	2,746	(1,556)
Database Architects	94	1,448	(1,354)
Software Quality Assurance Analysts and Testers	393	1,340	(947)

Source: Lightcast

Skills

Understanding the top skills requested by employers in key industry clusters is important for identifying skills gaps, aligning training and educational programs to meet industry needs, promoting career pathways, and supporting collaborative industry partnership initiatives. Table 57 shows the five most requested skills for top Information and Computers cluster occupations.

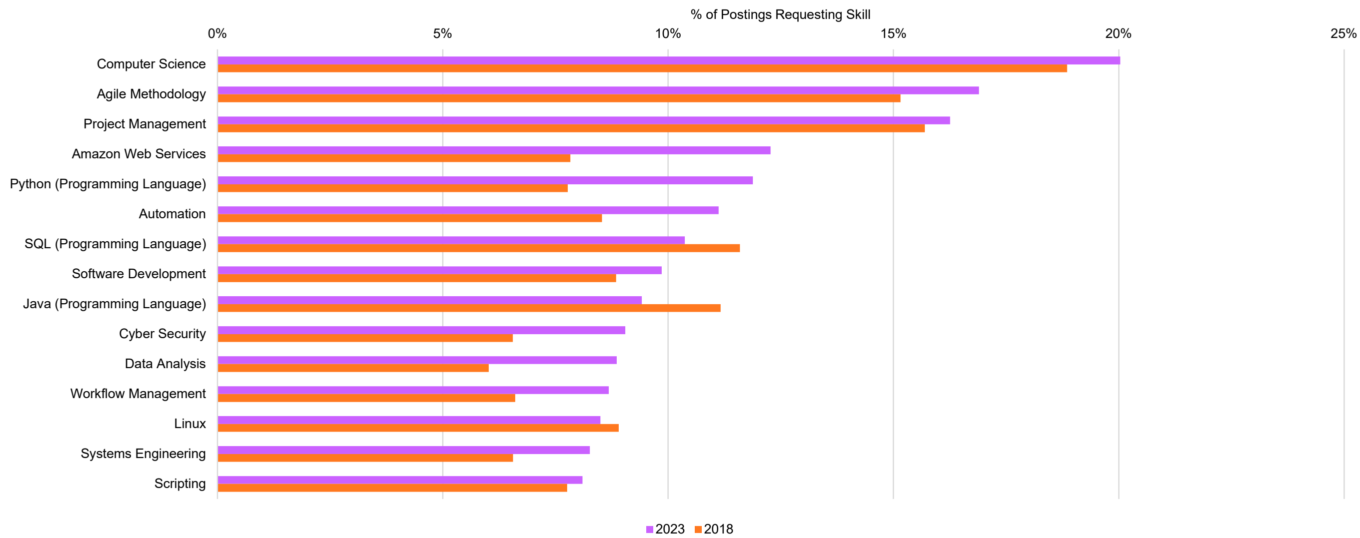
Table 57 – Top Requested Skills for Most In-Demand Occupations, Information & Computers Cluster, Washington DC MSA

Top Cluster Occupation	Top Requested Skills
Software Developers	• Computer Science • Agile Methodology • Java (Programming Language) • Amazon Web Services (AWS) • Software Development
Computer Systems Analysts	• Agile Methodology • Business Process • Systems Analysis • Computer Science • Project Management
Sales Representatives of Services	•Marketing • Inventory Control • Retail Operations • Cash Management • Selling Techniques

Source: Lightcast

Figure 84 shows the change in employer demand for top Information & Computers skills, measured by comparing the percent of local job postings in the industry cluster that requested that skill in 2018 and 2023. Key skills that are growing in demand include Agile Methodology, Amazon Web Services, Python (programming language), Automation, Cybersecurity, Data Analysis, Workflow Management, and Systems Engineering.

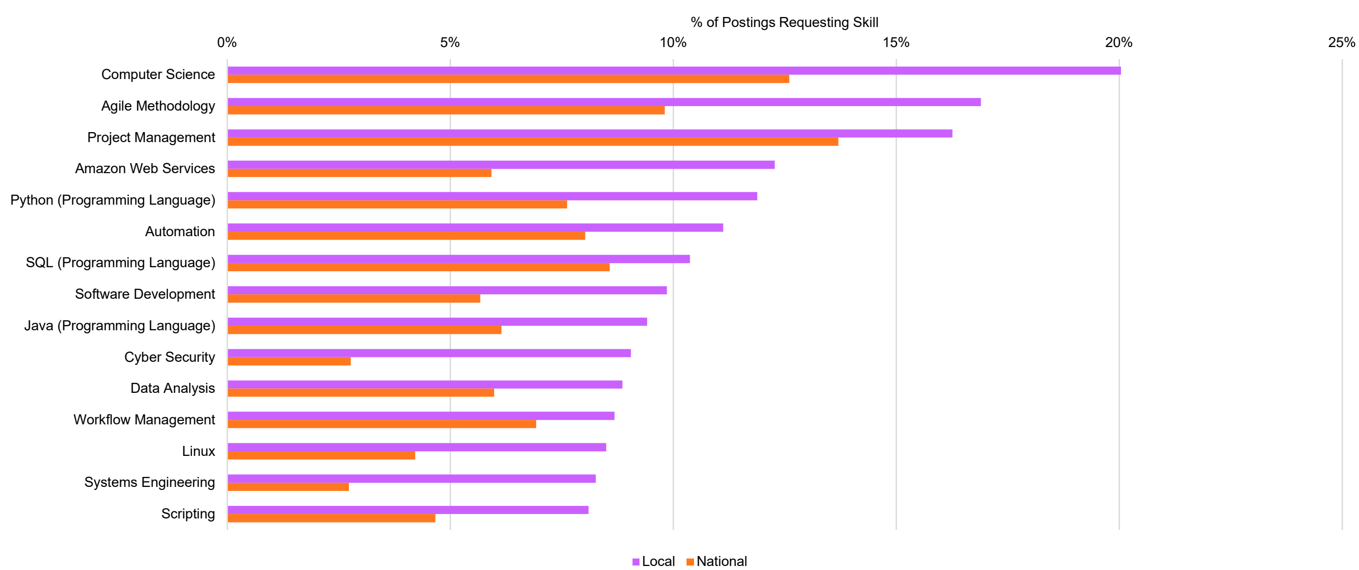
Figure 84 – Skill Demand Change of Top Cluster Skills, Washington DC MSA



Source: Lightcast

Figure 85 highlights differences in the regional (MSA) and national labor markets by comparing the percent of job postings that requested key skills in Washington, D.C. MSA versus the United States. As the chart shows, demand for technology and data management skills is significantly higher in the Washington, D.C. MSA than the United States overall, reflecting specialization in industries such as cybersecurity, government contracting, and technology consulting. For example, Computer Science was requested in 20% of regional postings compared to 13% of postings across the United States.

Figure 85 – Regional vs. National Skill Demand, Information & Computers Cluster



Source: Lightcast

Industry Employer Feedback

Roundtable discussions were held June 24-25, 2024 with Employ Prince George's industry partners in order to solicit employer feedback on: (1) demand projections; (2) their top workforce challenges; (3) current and future skills demand; (4) the impacts of technology/automation; and (5) their perceptions of local workforce capacity, workforce partners/programs, and higher education/training alignment with industry needs.

Information technology employers reported a surplus of low-skill candidates at entry level, with mid- and senior level candidates harder to find, especially as wage expectations have risen across the metropolitan area. There was consensus across industry clusters on a shortage of "soft" skills in the workforce, including communication, problem solving, attention to detail, and strategic thinking. A lack of soft skills is most problematic for employers in the 18–24-year-old workforce cohort, although some pointed to difficulty older workers have "unlearning" previous habits and adapting to new work cultures. Most felt the prevalence of remote work exacerbates these disconnects and will harm the development of young employees, long-term. School-based coding programs, as early as middle school, and industry outreach/mentoring programs were cited as potential solutions, that would require community partnerships.

Employers discussed the overlapping responsibilities of education/training systems and industry to prepare the entry level workforce with foundational skills and to promote opportunities for career pathway advancement. Help desk and desktop support roles were pointed to as viable on-ramps to the industry, career pathway advancement potential. Employers seem to prefer new employees come in with strong soft skills, as "hard" or technical skills can be taught more easily on the job.

Top positions in-demand include information security analysts, network architects, data managers/analysts, and cloud computing experts. Important skills cited as key to industry growth included cloud (Azure, Amazon Web Services), cybersecurity, agile methodology/scrum, artificial intelligence, and hardware/server maintenance. There was discussion on the differing requirements for government contract versus private work, a unique dynamic concentrated in Prince George's County and the Washington, DC MSA. Employers anticipate that AI will affect all career fields, and new technology jobs will be needed to enable that transformation across industries.

There was less consensus on the demand for specific industry credentials. In fact, employers reiterated the need for essential soft skills over (certified) expertise in particular technologies, software, or systems. It was also pointed out that the information technology industry stacks and layers certifications and credentials, making it essential to have a comprehensive approach to continuous learning and upskilling.

Professional, Scientific, & Technical Services, Administrative, Support, Nonprofit

Overview

For this analysis, a custom definition of the Professional Services industry cluster includes the following NAICS industry classification codes:

NAICS 54: The Professional, Scientific, and Technical Services sector* comprises establishments that specialize in delivering professional, scientific, and technical activities. These services demand extensive expertise and training. Businesses within this sector tailor their offerings to specific areas of expertise, catering to clients across diverse industries and occasionally to individual households. Their range of services includes legal representation, accounting and payroll management, architectural and engineering design, consulting, research, advertising, photography, language translation, veterinary care, and various other professional and technical services.

*Excluding 5415 Computer Systems Design and Related Services

NAICS 56: The Administrative and Support Services sector** includes businesses that handle essential support tasks for the operational needs of other organizations. These establishments offer their services to clients across diverse industries and, on occasion, to individual households. Services provided encompass a wide array of activities such as office administration, personnel recruitment and placement, document preparation, clerical support, solicitation, collections, security and surveillance, as well as cleaning services.

**Excluding 562 Waste Management and Remediation Services

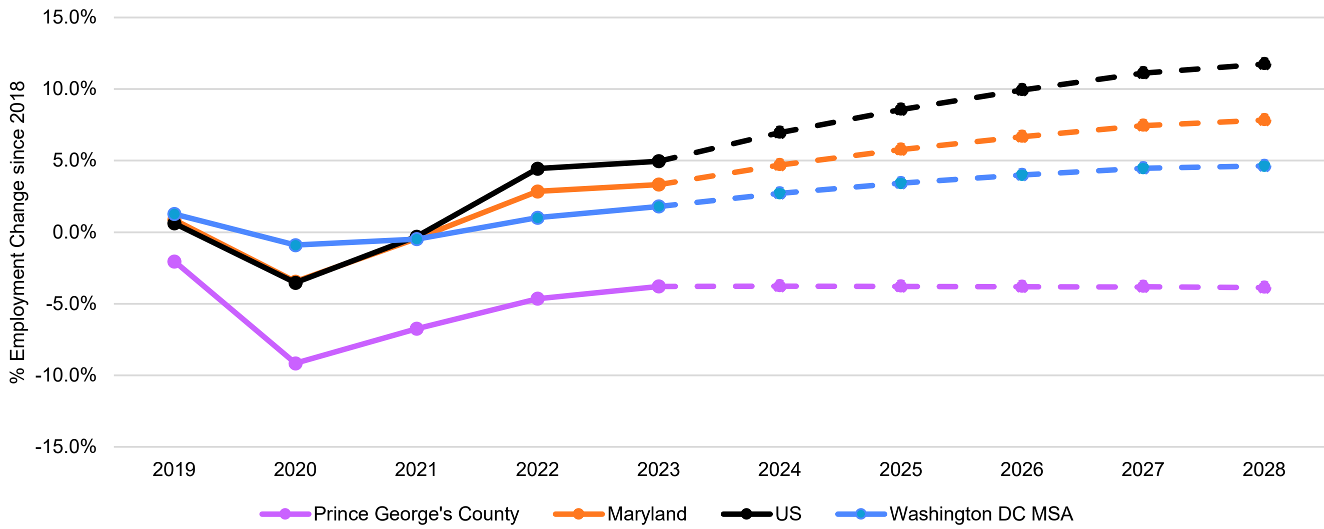
NAICS 813: The Religious, Grantmaking, Civic, Professional, and Similar Organizations subsector*** includes establishments that organize religious activities, provide financial support through grantmaking, advocate for social and political issues, and champion the interests of their members.

***referred to in this report as “Nonprofit” subsector

Employment Growth

As Figure 86 shows below, employment growth in the Professional Services sector in Prince George’s County has tracked below the Washington DC MSA, the state of Maryland, and the United States since 2018. Cluster employment in Prince George’s County is expected to further contract by 2028, while the MSA, Maryland and the United States are projected to see steady growth, which will further widen the gap in cluster performance at the county level. As a result, Prince George’s County employers within this cluster will face ongoing competition for skilled talent, customers, and other business resources that support growth.

Figure 86 - Professional Services Industry Cluster Employment Growth Trends



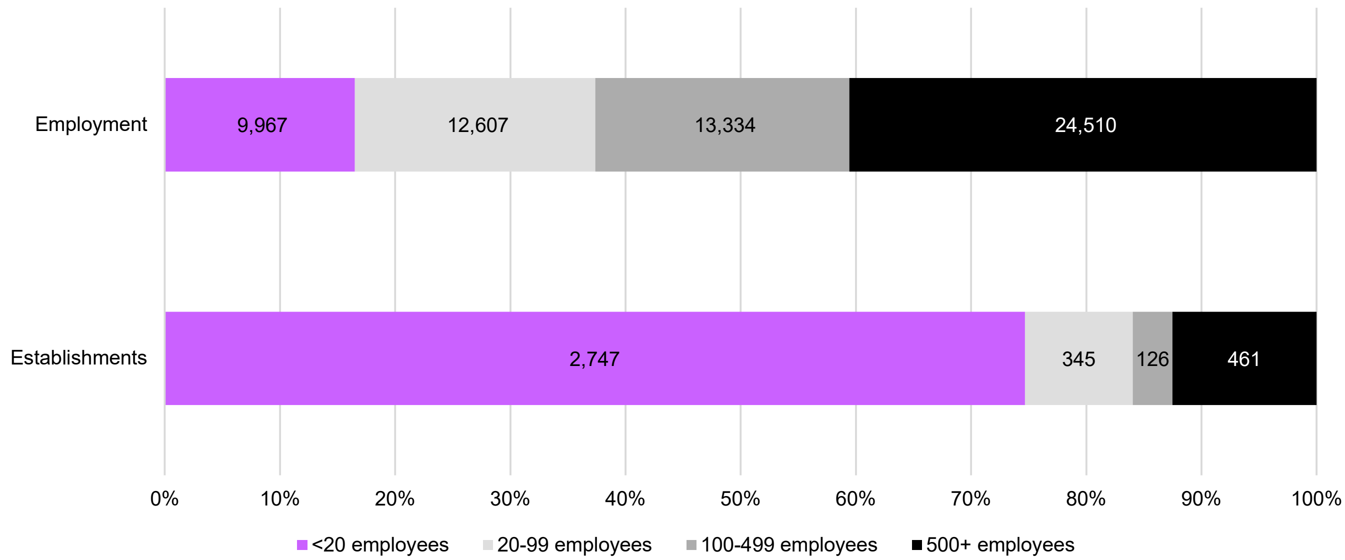
Source: Lightcast

Employment by Establishment Size

As Figures 87 and 88 below show the distribution of employment and number of establishments by establishment size is similar between Prince George's County and Washington, D.C. MSA. Over 2,700 establishments in Prince George's County (75% of the cluster total) have fewer than 20 employees, while less than 15% of establishments in the cluster have 500 or more employees. Despite this, establishments of 500 or more employees account for over 24,500 employees, the largest share by establishment size. Establishments with fewer than 20 employees account for just 16% of total employment (just under 10,000 employees).

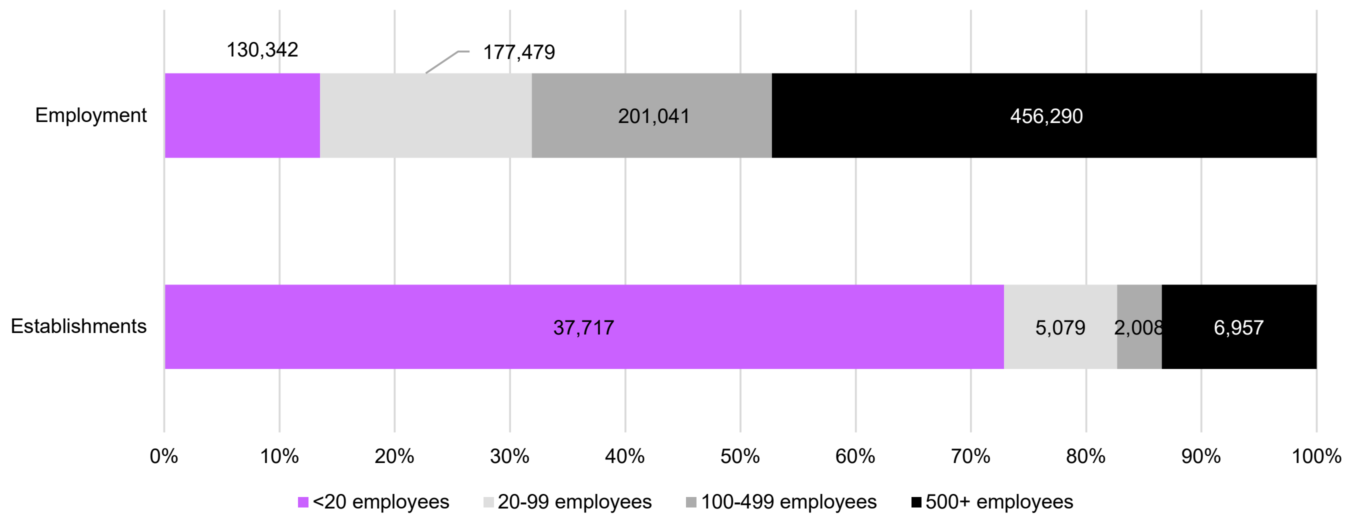
At the MSA level, roughly 73% of cluster establishments have fewer than 20 employees. Yet this establishment size only accounts for 130,342 employees, or 13% of total cluster employment. Establishments with 500 or more employees account for just 13% of total cluster establishments but over 60% of cluster employment (24,510 employees).

Figure 87 - Professional Services Employment and Establishments by Establishment Size, Prince George's County, 2020



Source: Lightcast

Figure 88 - Professional Services Employment and Establishments by Establishment Size, Washington DC MSA, 2020



Source: Lightcast

Cluster Subsector Analysis

Subsector Key Metrics

Ninety (90) 6-digit industry subsectors make up the Professional Services cluster in the Washington DC Metropolitan Statistical Area (MSA). See Table 58 below for the full list of industry subsectors, ranked by 2023 employment size. Included in Table 58 are each subsector's average earnings, total 2022 gross regional product (GRP) and the subsector's share of total GRP in the Professional Services industry cluster.

Top subsectors reflect a wide range of specialized activities and average wages. The sector with the highest number of jobs is Administrative Management and General Management Consulting Services (73,641 jobs), followed closely by Offices of Lawyers (47,449 jobs). Average earnings vary significantly across subsectors, reflecting the range of professional roles and skill levels. Offices of Lawyers provide nearly 15% of the cluster's GRP and offer average wages of $223,442 for highly educated and specialized professionals. The Janitorial Services subsector provides a similar number of jobs within the MSA, however contributes a much lower share of cluster GRP and significantly lower average wages ($35,119).

The presence of various specialized services such as Engineering Services, Architectural Services, and Environmental Consulting Services reflects demand for specialized expertise across diverse fields. Smaller subsectors like Research and Development in Nanotechnology and Marketing Research and Public Opinion Polling represent emerging areas within the Professional Services industry cluster, suggesting potential growth opportunities in specialized consulting and research fields.

Table 58 – Professional Services Subsectors, Washington DC MSA

NAICS	Subsector	2023 Jobs	Average Earnings	2022 GRP	Share of Cluster GRP
541611	Administrative Management and General Management Consulting Services	73,641	$160,958	$14,400,311,511	12.6%
541110	Offices of Lawyers	47,449	$223,442	$17,005,320,073	14.9%
561720	Janitorial Services	46,079	$35,119	$2,235,891,930	2.0%
541330	Engineering Services	40,602	$151,704	$7,195,575,595	6.3%
561320	Temporary Help Services	30,849	$74,880	$3,852,290,519	3.4%
561612	Security Guards and Patrol Services	28,373	$64,634	$2,029,207,634	1.8%
541715	Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	27,230	$167,205	$5,202,719,305	4.6%
813110	Religious Organizations	27,223	$38,100	$1,145,647,302	1.0%
561730	Landscaping Services	23,480	$52,322	$1,561,224,677	1.4%
541211	Offices of Certified Public Accountants	22,290	$167,182	$4,566,810,916	4.0%
813920	Professional Organizations	18,273	$143,632	$2,770,148,989	2.4%
561110	Office Administrative Services	17,562	$165,547	$3,435,439,352	3.0%
541990	All Other Professional, Scientific, and Technical Services	17,011	$127,344	$5,133,422,323	4.5%
813910	Business Associations	16,852	$202,436	$3,534,309,999	3.1%
541690	Other Scientific and Technical Consulting Services	14,776	$160,424	$2,959,905,950	2.6%
813319	Other Social Advocacy Organizations	13,555	$114,238	$1,718,689,642	1.5%
541720	Research and Development in the Social Sciences and Humanities	13,399	$130,716	$2,071,668,065	1.8%
541614	Process, Physical Distribution, and Logistics Consulting Services	12,808	$146,315	$2,144,363,547	1.9%
541618	Other Management Consulting Services	11,393	$171,624	$2,273,113,579	2.0%
541714	Research and Development in Biotechnology (except Nanobiotechnology)	10,836	$157,648	$2,028,407,069	1.8%
541820	Public Relations Agencies	10,355	$234,448	$3,776,189,602	3.3%
541940	Veterinary Services	9,622	$71,173	$1,055,567,031	0.9%
561210	Facilities Support Services	8,884	$84,695	$1,129,293,520	1.0%
541219	Other Accounting Services	8,157	$111,511	$1,156,998,421	1.0%
813410	Civic and Social Organizations	7,586	$76,609	$622,974,393	0.5%
561330	Professional Employer Organizations	7,355	$120,048	$1,744,233,415	1.5%
813311	Human Rights Organizations	7,221	$105,233	$802,217,449	0.7%
541613	Marketing Consulting Services	6,879	$122,706	$1,132,961,314	1.0%
541310	Architectural Services	6,540	$133,221	$1,072,063,368	0.9%
813312	Environment, Conservation and Wildlife Organizations	5,487	$125,970	$751,308,033	0.7%
813211	Grantmaking Foundations	4,923	$139,606	$774,795,232	0.7%
813930	Labor Unions and Similar Labor Organizations	4,587	$128,819	$605,130,584	0.5%
541620	Environmental Consulting Services	4,283	$127,381	$635,916,871	0.6%
561621	Security Systems Services (except Locksmiths)	3,744	$97,708	$482,930,112	0.4%
561311	Employment Placement Agencies	3,517	$89,874	$687,376,336	0.6%
813990	Other Similar Organizations (except Business, Professional, Labor, and Political Organizations)	3,170	$77,202	$261,833,885	0.2%
541612	Human Resources Consulting Services	3,163	$177,951	$777,286,756	0.7%
561990	All Other Support Services	3,095	$65,984	$309,431,210	0.3%

NAICS	Subsector	2023 Jobs	Average Earnings	2022 GRP	Share of Cluster GRP
561790	Other Services to Buildings and Dwellings	3,067	$52,781	$258,348,447	0.2%
541214	Payroll Services	3,054	$93,601	$348,530,246	0.3%
813219	Other Grantmaking and Giving Services	2,970	$110,342	$356,046,353	0.3%
541810	Advertising Agencies	2,912	$151,004	$801,629,753	0.7%
541213	Tax Preparation Services	2,625	$70,889	$238,180,311	0.2%
541910	Marketing Research and Public Opinion Polling	2,595	$146,261	$562,007,385	0.5%
541430	Graphic Design Services	2,588	$66,333	$375,263,369	0.3%
541410	Interior Design Services	2,453	$76,583	$339,515,654	0.3%
813212	Voluntary Health Organizations	2,372	$134,666	$368,575,485	0.3%
561710	Exterminating and Pest Control Services	2,241	$66,212	$177,238,637	0.2%
541930	Translation and Interpretation Services	2,183	$109,693	$451,843,324	0.4%
561499	All Other Business Support Services	2,181	$91,156	$294,960,480	0.3%
541191	Title Abstract and Settlement Offices	2,138	$111,794	$502,223,233	0.4%
813940	Political Organizations	1,882	$135,330	$229,715,133	0.2%
561920	Convention and Trade Show Organizers	1,862	$97,193	$251,620,663	0.2%
561510	Travel Agencies	1,716	$82,255	$215,024,581	0.2%
541860	Direct Mail Advertising	1,619	$92,255	$254,483,381	0.2%
541380	Testing Laboratories	1,499	$116,010	$209,070,393	0.2%
561410	Document Preparation Services	1,459	$61,293	$119,236,214	0.1%
541199	All Other Legal Services	1,381	$121,470	$301,825,315	0.3%
561312	Executive Search Services	1,324	$174,569	$342,069,196	0.3%
561599	All Other Travel Arrangement and Reservation Services	1,321	$102,336	$249,481,540	0.2%
561439	Other Business Service Centers (including Copy Shops)	1,191	$58,384	$85,154,828	0.1%
541890	Other Services Related to Advertising	1,190	$82,160	$186,002,381	0.2%
561740	Carpet and Upholstery Cleaning Services	1,176	$54,102	$100,158,869	0.1%
541320	Landscape Architectural Services	1,025	$94,909	$133,350,812	0.1%
561422	Telemarketing Bureaus and Other Contact Centers	1,003	$75,736	$114,135,707	0.1%
561611	Investigation Services	1,000	$77,695	$99,929,701	0.1%
541370	Surveying and Mapping (except Geophysical) Services	852	$111,384	$112,554,932	0.1%
541921	Photography Studios, Portrait	758	$43,081	$117,984,576	0.1%
541350	Building Inspection Services	622	$78,708	$64,893,777	0.1%
561431	Private Mail Centers	583	$39,801	$30,318,589	0.0%
541490	Other Specialized Design Services	516	$78,804	$61,003,961	0.1%
561622	Locksmiths	494	$68,117	$43,184,751	0.0%
561492	Court Reporting and Stenotype Services	473	$73,134	$68,067,223	0.1%
561450	Credit Bureaus	466	$207,064	$54,963,175	0.0%
541840	Media Representatives	407	122,970	$91,284,873.50	0.1%
561440	Collection Agencies	382	$68,469	$29,818,306	0.0%
561591	Convention and Visitors Bureaus	356	$104,533	$39,352,376	0.0%
541713	Research and Development in Nanotechnology	335	$160,678	$77,821,584	0.1%
561613	Armored Car Services	332	$60,467	$24,964,038	0.0%
541922	Commercial Photography	289	$57,181	$98,415,028	0.1%
541850	Outdoor Advertising	274	$98,517	$57,145,076	0.1%

NAICS	Subsector	2023 Jobs	Average Earnings	2022 GRP	Share of Cluster GRP
561520	Tour Operators	266	$71,851	$29,177,051	0.0%
541830	Media Buying Agencies	171	$143,567	$50,817,349	0.0%
541340	Drafting Services	155	$76,891	$18,548,664	0.0%
561421	Telephone Answering Services	152	$44,045	$8,073,139	0.0%
541420	Industrial Design Services	121	$74,752	$14,634,541	0.0%
561910	Packaging and Labeling Services	120	$53,146	$10,517,021	0.0%
541870	Advertising Material Distribution Services	116	$91,058	$22,118,328	0.0%
561491	Repossession Services	92	$58,270	$9,526,686	0.0%
541360	Geophysical Surveying and Mapping Services	88	$90,630	$9,307,121	0.0%

Source: Lightcast

Strong, Emerging, Threatened Subsectors

Lightcast's analysis includes an assessment of Professional Services industry subsectors relative to their concentration in the county or the MSA and the projected growth/decline in jobs and concentration.

At the county level, strong industry subsectors are defined as having a location quotient (LQ) of 1.1 or higher in 2023 and projected job growth of > 20 jobs by 2028. At the MSA level, strong industry subsectors are defined as having a location quotient (LQ) of 1.1 or higher in 2023 and projected job growth of > 100 jobs by 2028.

Table 59 - STRONG Professional Services Industry Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
541611	Administrative Management and General Management Consulting Services	541110	Offices of Lawyers
541614	Process, Physical Distribution, and Logistics Consulting Services	541199	All Other Legal Services
541620	Environmental Consulting Services	541211	Offices of Certified Public Accountants
561210	Facilities Support Services	541611	Administrative Management and General Management Consulting Services
561599	All Other Travel Arrangement and Reservation Services	541618	Other Management Consulting Services
561621	Security Systems Services (except Locksmiths)	541690	Other Scientific and Technical Consulting Services
561720	Janitorial Services	541714	Research and Development in Biotechnology (except Nanobiotechnology)
561730	Landscaping Services	541715	Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)
813319	Other Social Advocacy Organizations	541820	Public Relations Agencies
		541990	All Other Professional, Scientific, and Technical Services
		561110	Office Administrative Services
		561210	Facilities Support Services
		561612	Security Guards and Patrol Services
		561621	Security Systems Services (except Locksmiths)

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
		561720	Janitorial Services
		813211	Grantmaking Foundations
		813212	Voluntary Health Organizations
		813219	Other Grantmaking and Giving Services
		813311	Human Rights Organizations
		813312	Environment, Conservation and Wildlife Organizations
		813319	Other Social Advocacy Organizations
		813940	Political Organizations
		813990	Other Similar Organizations (except Business, Professional, Labor, and Political Organizations)

Source: Lightcast

At the county level, emerging industry subsectors are defined as having a location quotient (LQ) between 0.90 and 1.1, a growing LQ, and projected growth of at least 20 jobs by 2028. At the MSA level, emerging industry subsectors are defined as having a location quotient (LQ) between 0.90 and 1.1, a growing LQ, and projected growth of at least 100 jobs by 2028.

Table 60 - EMERGING Professional Services Industry Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
541890	Other Services Related to Advertising	561450	Credit Bureaus
541990	All Other Professional, Scientific, and Technical Services		

Source: Lightcast

At the county level, threatened industry subsectors are defined as having a location quotient (LQ) of .90 or lower in 2023 and projected job decline of 20 or more jobs by 2028. At the MSA level, threatened industry subsectors are defined as having a location quotient (LQ) of .90 or lower in 2023 and projected job decline of 100 or more jobs by 2028.

Table 61 - THREATENED Professional Services Industry Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
541330	Engineering Services	541191	Title Abstract and Settlement Offices
541860	Direct Mail Advertising	541219	Other Accounting Services
561612	Security Guards and Patrol Services	541310	Architectural Services
561740	Carpet and Upholstery Cleaning Services	541330	Engineering Services
561920	Convention and Trade Show Organizers	541430	Graphic Design Services
813110	Religious Organizations	541614	Process, Physical Distribution, and Logistics Consulting Services
		541720	Research and Development in the Social Sciences and Humanities
		541860	Direct Mail Advertising
		561439	Other Business Service Centers (including Copy Shops)
		813910	Business Associations
		813920	Professional Organizations
		813930	Labor Unions and Similar Labor Organizations

Source: Lightcast

Subsectors with High Concentration

In the Washington-Arlington-Alexandria MSA, several Professional Services subsectors have significant employment concentrations, related to the region's proximity to federal government agencies and national non-governmental or membership organizations (see Table 62). It should come as no surprise that such a high concentration of non-profit organization employment is in the country's capitol metro.

Table 62 - Professional Services Subsectors with High Concentration of Employment

Industry Subsector	2023 Jobs	2023 Payrolled Business Locations	2023 Employment Concentration
Professional Organizations	18,273	943	9.99
Research and Development in the Social Sciences and Humanities	13,399	478	9.31
Political Organizations	1,882	378	7.12
Business Associations	16,852	1,105	6.90
Public Relations Agencies	10,355	1,295	6.13
Human Rights Organizations	7,221	534	6.04
Other Social Advocacy Organizations	13,555	1,167	5.43

Source: Lightcast

Occupations & Skills

Top Occupations

Table 63 lists the top 20 Professional Services occupations in the Washington-Arlington-Alexandria MSA. Together, these occupations account for over half (52.1%) of all cluster employment. The table provides employment level trends by occupation within the cluster between 2018 - 2023 and projected employment by 2028 in order to identify growth trends and the potential for workforce strategies to address anticipated demand growth (or decline). The table also includes the number of people employed in that occupation in all industries in the MSA. This indicates the level of competition employers may face from industries outside the Professional Services cluster when hiring for key occupations.

Our inclusion of Administrative and Support Services within the Professional Services cluster results in an occupation list with a wide range of education, skills, and experience requirements. For example, Management Analysts, Lawyers, and Accountants/ Auditors generally require BA/BA+ degrees and years of experience while Janitors/Cleaners, Security Guards and Landscaping/ Groundskeeping Workers are often entry-level roles without degree requirements.

Table 63 - Top 20 Professional Services Occupations, Washington DC MSA

Occupation	Employed in Cluster 2023	% Change 2018 - 2023	Projected % Change 2023 - 2028	% of Total Jobs in Industry 2023	All Jobs for Occupation in MSA 2023	County Resident Workers 2023
Management Analysts	38,553	19%	4%	5.6%	81,519	7,556
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	37,749	(7%)	1%	5.5%	60,214	9,253
Lawyers	32,626	7%	3%	4.8%	54,178	7,144
General and Operations Managers	31,893	48%	4%	4.7%	102,617	14,515
Security Guards	29,633	2%	1%	4.3%	41,147	7,074
Accountants and Auditors	23,696	6%	2%	3.5%	48,442	5,146
Landscaping and Groundskeeping Workers	15,400	(0%)	2%	2.2%	20,547	3,168

Occupation	Employed in Cluster 2023	% Change 2018 - 2023	Projected % Change 2023 - 2028	% of Total Jobs in Industry 2023	All Jobs for Occupation in MSA 2023	County Resident Workers 2023
Public Relations Specialists	14,664	(10%)	4%	2.1%	23,785	3,533
Project Management Specialists	14,477	76%	2%	2.1%	34,742	4,351
Business Operations Specialists, All Other	13,306	140%	3%	1.9%	78,940	12,209
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	12,780	(27%)	(5%)	1.9%	42,194	7,331
Office Clerks, General	12,210	(23%)	(1%)	1.8%	50,646	5,892
Market Research Analysts and Marketing Specialists	11,872	1%	9%	1.7%	22,872	2,369
Customer Service Representatives	10,934	(16%)	0%	1.6%	43,267	5,771
Software Developers	10,793	46%	11%	1.6%	72,157	4,653
Managers, All Other	10,364	27%	3%	1.5%	54,079	7,921
Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	9,833	(4%)	5%	1.4%	31,692	3,481
Human Resources Specialists	9,464	29%	7%	1.4%	30,178	3,887
Paralegals and Legal Assistants	8,726	9%	2%	1.3%	13,218	1,672
Bookkeeping, Accounting, and Auditing Clerks	8,093	(19%)	(1%)	1.2%	23,948	3,073

Source: Lightcast

Occupational Supply & Demand

Table 64 provides insight into the supply and demand dynamics for various occupations within the Professional Services industry cluster in the Washington-Arlington-Alexandria MSA. The table highlights occupations where there is a significant gap between the estimated active supply (the number of individuals currently employed or available in the workforce) and the estimated active demand (the number of positions currently needed by employers).

Within the Professional Services industry cluster, the occupation with the largest gap between supply and demand is Software Developers, where a substantial deficit of 10,764 professionals is estimated. Management Analysts, a top occupation in the cluster expected to see 4% growth by 2028, is already facing an estimated shortage of 2,332 professionals. Understanding these supply-demand gaps is crucial for aligning education programming, training initiatives, and recruitment strategies to address the most critical labor market imbalances within key industry clusters.

Table 64 - Professional Services Industry Cluster Largest Supply-Demand Gaps, Washington DC MSA

Occupation	Active Supply Estimate	Active Demand Estimate	Supply / Demand Gap
Software Developers	2,983	13,747	(10,764)
Managers, All Other	3,638	7,674	(4,036)
Management Analysts	2,485	4,816	(2,332)
Security Guards	783	2,440	(1,657)

Occupation	Active Supply Estimate	Active Demand Estimate	Supply / Demand Gap
Project Management Specialists	1,189	2,746	(1,556)
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	2,438	3,612	(1,174)
Accountants and Auditors	1,604	2,648	(1,044)
Human Resources Specialists	1,311	1,993	(682)
Paralegals and Legal Assistants	366	787	(421)
Customer Service Representatives	2,638	2,863	(224)
Market Research Analysts and Marketing Specialists	1,115	1,320	(205)
Lawyers	1,469	1,584	(115)

Source: Lightcast

Skills

Understanding the top skills requested by employers in key industry clusters is important for identifying skills gaps, aligning training and educational programs to meet industry needs, promoting career pathways, and supporting collaborative industry partnership initiatives.

Table 65 shows the five most requested skills for top Professional Services occupations.

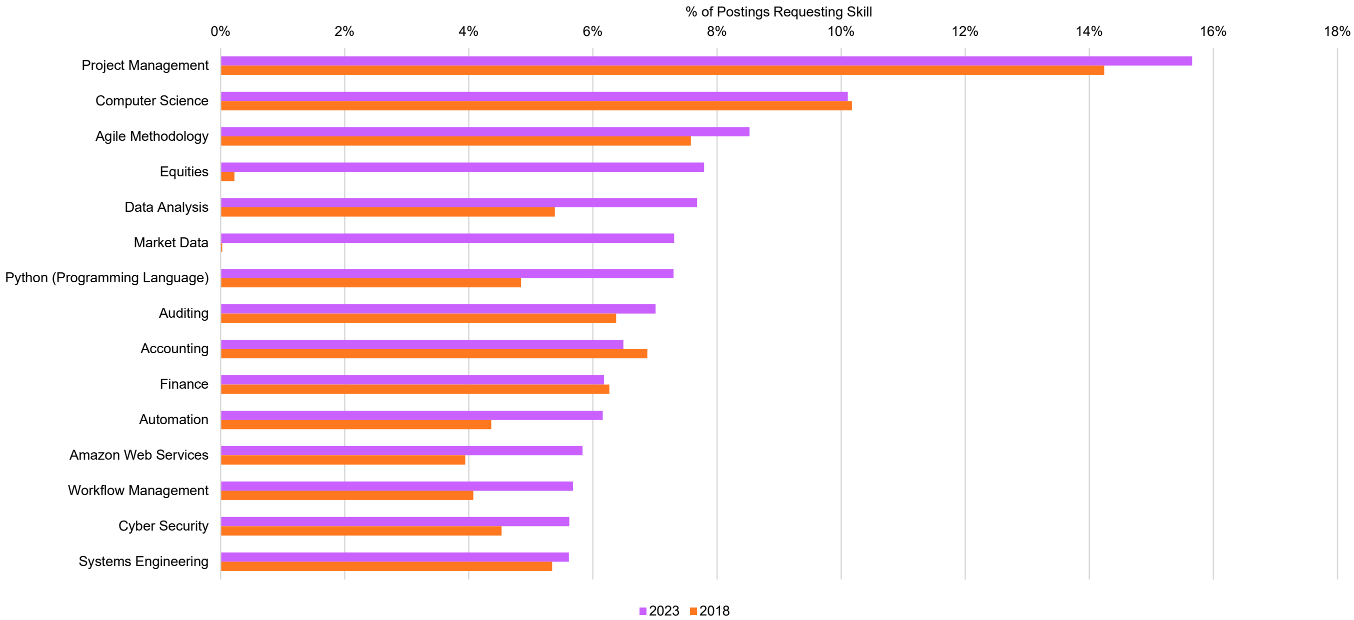
Table 65 - Top Requested Skills for Most In-Demand Occupations, Professional Services Cluster, Washington DC MSA

Top Cluster Occupation	Top Requested Skills
Management Analysts	• Project Management • Data Analysis • Business Process • Agile Methodology • Finance
Janitors & Cleanors	• Mopping • Furniture Cleaning • Squeegee • Window Cleaning • Disinfecting
Accountants & Auditors	• Accounting • Auditing • Financial Statements • Finance • Generally Accepted Accounting Principles (GAAP)

Source: Lightcast

Figure 89 shows the change in employer demand for top Professional Services skills, measured by comparing the percentage of local job postings in the industry cluster that requested that skill in 2018 and 2023. Key skills that are growing in demand include Project Management, Agile Methodology, Equities, Data Analysis, Python (programming language), Automation, Amazon Web Services, and Cybersecurity.

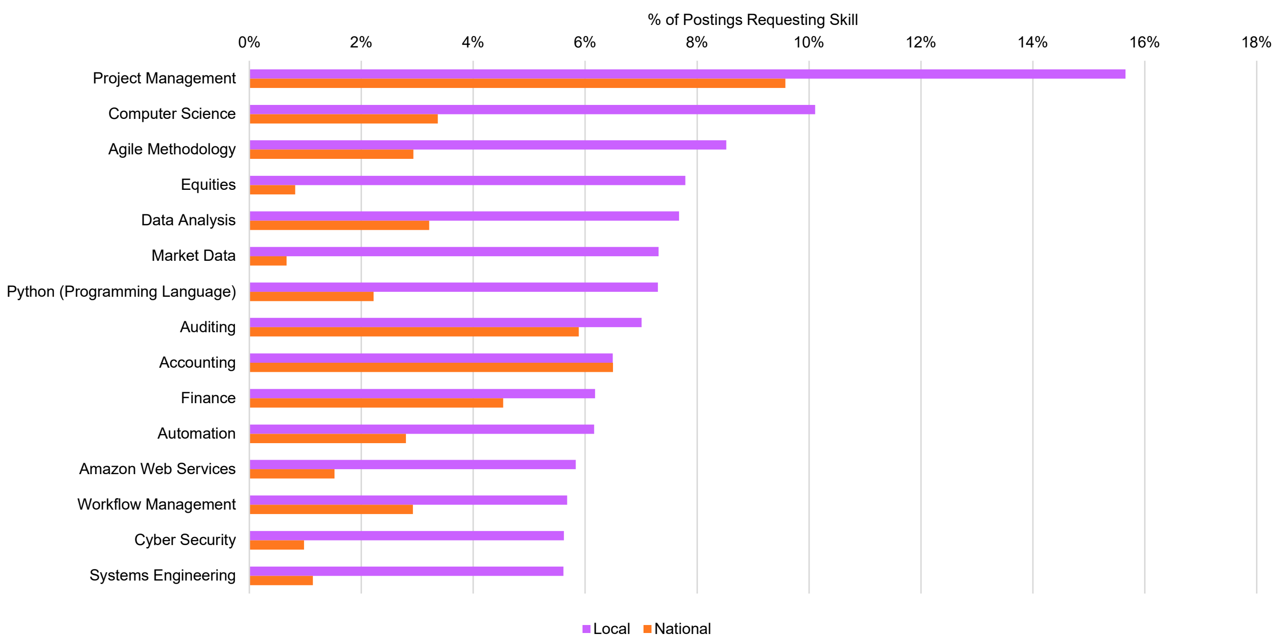
Figure 89 - Skill Demand Change of Top Cluster Skills, Washington DC MSA



Source: Lightcast

Figure 90 highlights differences in the regional (MSA) and national labor markets by comparing the percentage of job postings that requested key skills in Washington, D.C. MSA versus the United States. As the chart shows, demand for technology and data management skills is significantly higher in the Washington, D.C. MSA than the United States overall, reflecting specialization in industries such as cybersecurity, government contracting, and technology consulting. A concentration of tech companies, government agencies, and research institutions in the DC area amplifies the demand for these specialized skills.

Figure 90 - Regional vs. National Skill Demand, Professional Services Cluster



Source: Lightcast

Industry Employer Feedback

Roundtable discussions were held June 24-25, 2024 with Employ Prince George's industry partners in order to solicit employer feedback on: (1) demand projections; (2) their top workforce challenges; (3) current and future skills demand; (4) the impacts of technology/automation; and (5) their perceptions of local workforce capacity, workforce partners/programs, and higher education/training alignment with industry needs.

It should be noted that employers representing the Professional Services industry cluster were concentrated within local government agencies rather than the private sector. Their needs reflected a wider range of positions than the cluster data would indicate, including the skilled trades, recreation professionals, planners, and architects. Overall, employers reported a surplus of quality candidates for professional and administrative roles, and high retention rates for those roles. Hiring and retention is more challenging for entry-level and seasonal roles and there was consensus around a shortage of "soft" skills, namely problem solving, attention to detail, and strategic thinking. Several employers noted that candidates seem to apply for jobs arbitrarily and are unable to articulate how their interests or experience align to job qualifications.

Health Care & Social Assistance

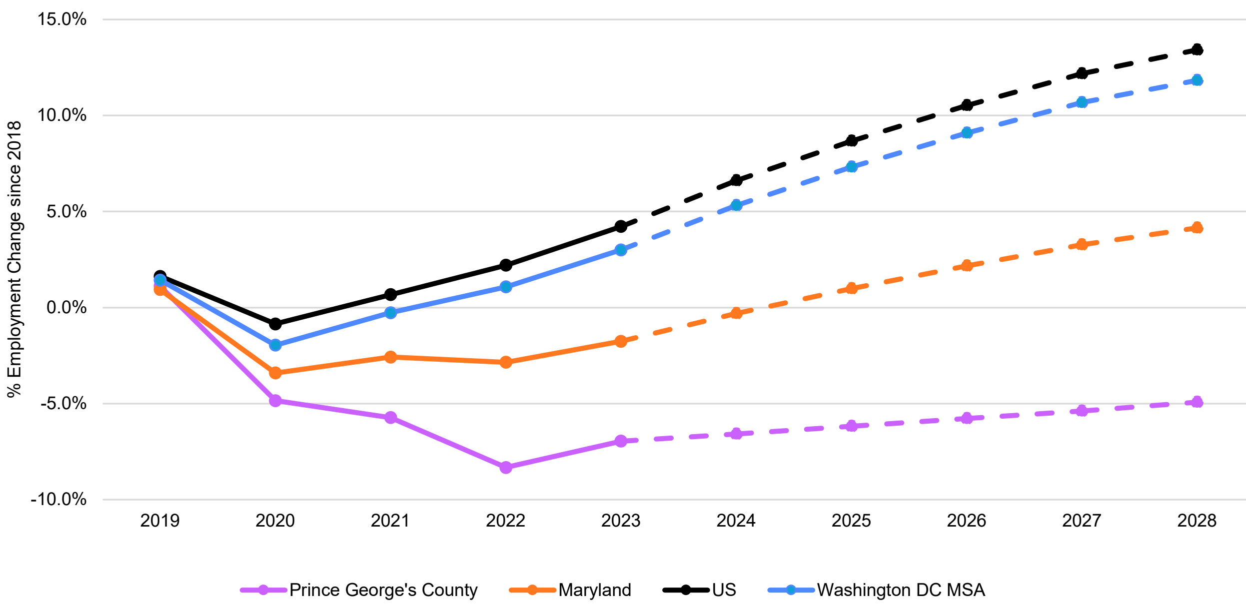
Overview

NAICS 62: The Health Care and Social Assistance sector comprises establishments consists of establishments that offer health care and social assistance to individuals. This sector encompasses a spectrum of services ranging from medical care facilities to those providing both health care and social assistance, and finally to those focusing solely on social assistance. Services within this sector are provided by skilled professionals, such as health practitioners and social workers, who bring specific expertise to their roles.

Employment Growth

As Figure 91 shows below, employment growth in the Health Care & Social Assistance sector in Prince George's County has tracked below the Washington DC MSA, the state of Maryland, and the United States since the pandemic dip in 2020. The 2020 decline was steeper in Prince George's County and healthcare employment in the county is expected to further contract by 2028, while the MSA, Maryland and the United States are projected to see steady growth. As these trends further widen the gap in cluster performance at the county level, Prince George's County employers will face ongoing competition for healthcare talent.

Figure 91 - Health Care & Social Assistance Industry Cluster Employment Growth Trends



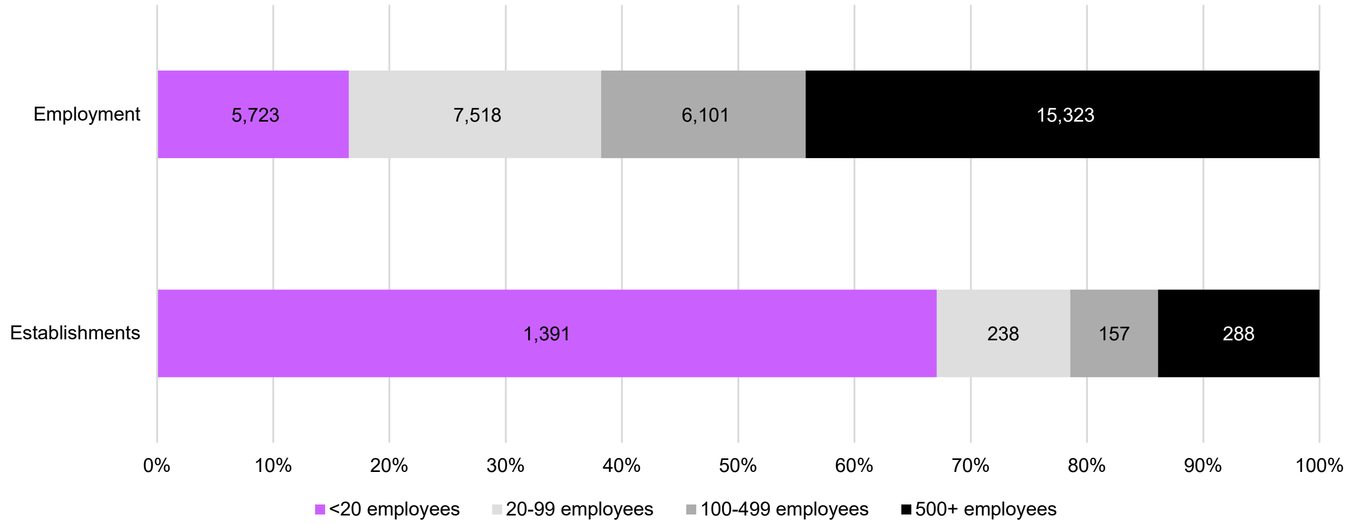
Source: Lightcast

Employment by Establishment Size

As Figures 92 and 93 below show, the distribution of employment and number of establishments by establishment size is similar between the county and MSA. There are 1,391 cluster establishments in Prince George's County (67% of the cluster total) that have fewer than 20 employees, while just 14% of establishments in the cluster have 500 or more employees. Despite this, establishments of 500 or more employees account for the largest share of total cluster employment (44%). Establishments with fewer than 20 employees account for just 17% of total employment (5,723 employees).

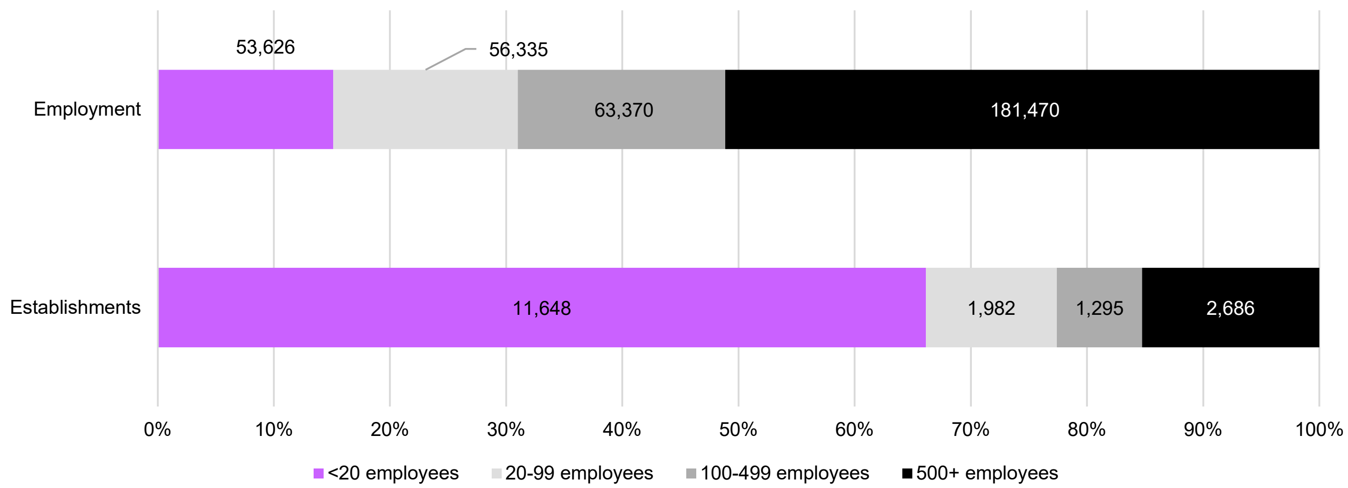
At the MSA level, roughly 66% of cluster establishments have fewer than 20 employees. Yet this establishment size only accounts for 53,626 employees, or 15% of total cluster employment. Establishments with 500 or more employees account for just 15% of total cluster establishments but 51% of cluster employment (181,470 employees).

Figure 92 - Health Care & Social Assistance Employment and Establishments by Establishment Size, Prince George's County, 2020



Source: US Census Bureau

Figure 93 - Health Care & Social Assistance Employment and Establishments by Establishment Size, Washington DC MSA, 2020



Source: US Census Bureau

Cluster Subsector Analysis

Subsector Key Metrics

Ninety (90) 6-digit industry subsectors make up the Health Care and Social Assistance industry in the Washington DC Metropolitan Statistical Area (MSA). See Table 66 below for the full list of industry subsectors, ranked by 2023 employment size. Included in Table 66 are each subsector's average earnings, total 2022 gross regional product (GRP) and the subsector's share of total GRP in the Health Care and Social Assistance industry.

General Medical and Surgical Hospitals is the top subsector in terms of employment volume (71,323 jobs in 2023) and its share of the cluster's overall GRP (28.1%). Together, the top two subsectors account for 53% of the cluster's GRP. Home Health Care Services employs over 30,000 individuals, however with significantly lower average earnings ($48,298). A diverse range of healthcare specialties have a presence across the region, from dental offices to specialized facilities like Diagnostic Imaging Centers and Kidney Dialysis Centers.

Table 66 - Health Care & Social Assistance Subsectors, Washington DC MSA

NAICS	Subsector	2023 Jobs	Average Earnings	2022 GRP	Share of Cluster GRP
622110	General Medical and Surgical Hospitals	71,323	$108,514	$8,903,838,381	28.1%
621111	Offices of Physicians (except Mental Health Specialists)	51,574	$144,930	$7,890,810,949	24.9%
621610	Home Health Care Services	30,441	$48,298	$1,830,572,587	5.8%
621210	Offices of Dentists	22,195	$90,616	$2,414,138,909	7.6%
623110	Nursing Care Facilities (Skilled Nursing Facilities)	14,060	$69,850	$1,051,070,653	3.3%
623311	Continuing Care Retirement Communities	11,939	$57,570	$730,668,980	2.3%
623312	Assisted Living Facilities for the Elderly	7,437	$50,979	$431,828,454	1.4%
621491	HMO Medical Centers	7,214	$117,257	$1,319,710,529	4.2%
623210	Residential Intellectual and Developmental Disability Facilities	6,986	$56,464	$441,436,712	1.4%
621340	Offices of Physical, Occupational and Speech Therapists, and Audiologists	6,498	$66,409	$533,171,940	1.7%
621511	Medical Laboratories	5,795	$91,273	$827,986,533	2.6%
621330	Offices of Mental Health Practitioners (except Physicians)	4,718	$71,390	$742,757,548	2.3%
623220	Residential Mental Health and Substance Abuse Facilities	4,233	$60,372	$278,928,973	0.9%
621420	Outpatient Mental Health and Substance Abuse Centers	3,754	$71,457	$392,434,898	1.2%
621399	Offices of All Other Miscellaneous Health Practitioners	3,295	$75,716	$462,276,787	1.5%
621493	Freestanding Ambulatory Surgical and Emergency Centers	3,250	$86,148	$415,450,896	1.3%
623990	Other Residential Care Facilities	2,955	$63,487	$185,941,226	0.6%
621498	All Other Outpatient Care Centers	2,953	$83,308	$392,565,704	1.2%
621320	Offices of Optometrists	2,881	$79,761	$235,594,602	0.7%
621492	Kidney Dialysis Centers	2,874	$82,676	$371,434,050	1.2%
621112	Offices of Physicians, Mental Health Specialists	2,607	$123,317	$431,526,839	1.4%
621512	Diagnostic Imaging Centers	2,255	$88,876	$296,151,083	0.9%
621999	All Other Miscellaneous Ambulatory Health Care Services	2,085	$94,722	$222,775,624	0.7%
621310	Offices of Chiropractors	1,974	$66,513	$144,875,716	0.5%

NAICS	Subsector	2023 Jobs	Average Earnings	2022 GRP	Share of Cluster GRP
622310	Specialty (except Psychiatric and Substance Abuse) Hospitals	1,894	$97,026	$204,250,961	0.6%
622210	Psychiatric and Substance Abuse Hospitals	1,605	$82,094	$154,173,633	0.5%
621410	Family Planning Centers	1,411	$105,267	$187,143,599	0.6%
621910	Ambulance Services	976	$69,081	$77,544,033	0.2%
621391	Offices of Podiatrists	713	$88,292	$61,213,383	0.2%
621991	Blood and Organ Banks	375	$91,980	$41,092,945	0.1%

Source: Lightcast

Strong, Emerging, Threatened Subsectors

Lightcast's analysis includes an assessment of Health Care and Social Assistance industry subsectors relative to their concentration in the county or the MSA and the projected growth/decline in jobs and concentration.

At the county level, strong industry subsectors are defined as having a location quotient (LQ) of 1.1 or higher in 2023 and projected job growth of > 20 jobs by 2028. At the MSA level, strong industry subsectors are defined as having a location quotient (LQ) of 1.1 or higher in 2023 and projected job growth of > 100 jobs by 2028.

Table 67 - STRONG Health Care & Social Assistance Industry Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
621491	HMO Medical Centers	621112	Offices of Physicians, Mental Health Specialists
621492	Kidney Dialysis Centers	621410	Family Planning Centers
621999	All Other Miscellaneous Ambulatory Health Care Services	621491	HMO Medical Centers
623990	Other Residential Care Facilities	621511	Medical Laboratories
		623311	Continuing Care Retirement Communities
		624229	Other Community Housing Services
		624410	Child Day Care Services

Source: Lightcast

At the county level, emerging industry subsectors are defined as having a location quotient (LQ) between 0.90 and 1.1, a growing LQ, and projected growth of at least 20 jobs by 2028. At the MSA level, emerging industry subsectors are defined as having a location quotient (LQ) between 0.90 and 1.1, a growing LQ, and projected growth of at least 100 jobs by 2028.

Table 68 - EMERGING Health Care & Social Assistance Industry Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
621610	Home Health Care Services	621111	Offices of Physicians (except Mental Health Specialists)
624190	Other Individual and Family Services	621210	Offices of Dentists
		621492	Kidney Dialysis Centers
		621493	Freestanding Ambulatory Surgical and Emergency Centers
		621610	Home Health Care Services
		621999	All Other Miscellaneous Ambulatory Health Care Services
		623210	Residential Intellectual and Developmental Disability Facilities

Source: Lightcast

At the county level, threatened industry subsectors are defined as having a location quotient (LQ) of .90 or lower in 2023 and projected job decline of 20 or more jobs by 2028. At the MSA level, threatened industry subsectors are defined as having a location quotient (LQ) of .90 or lower in 2023 and projected job decline of 100 or more jobs by 2028.

Table 69 - THREATENED Health Care & Social Assistance Industry Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
621512	Diagnostic Imaging Centers	624230	Emergency and Other Relief Services
623210	Residential Intellectual and Developmental Disability Facilities	624310	Vocational Rehabilitation Services
624310	Vocational Rehabilitation Services		
624410	Child Day Care Services		

Source: Lightcast

Subsectors with High Concentration

In the Washington-Arlington-Alexandria MSA, several subsectors within the Health Care and Social Assistance cluster have employment concentrations higher than the national average, including Family Planning Centers (1.97) and HMO Medical Centers (1.66). A concentration of Continuing Care Retirement Communities (1.24) could drive increasing demand for in-home support services and exacerbate shortages in the frontline workforce.

Table 70 - Health Care & Social Assistance Subsectors with High Concentration of Employment, Washington DC MSA

Industry Subsector	2023 Jobs	2023 Employment Concentration
Family Planning Centers	1,411	1.97
HMO Medical Centers	7,214	1.66
Offices of Physicians, Mental Health Specialists	2,607	1.39
Continuing Care Retirement Communities	11,939	1.24
Diagnostic Imaging Centers	2,255	1.22
Medical Laboratories	5,795	1.13

Source: Lightcast

Occupations & Skills

Top Occupations

Table 71 lists the top 20 Health Care & Social Assistance occupations in the Washington-Arlington-Alexandria MSA. Together, these occupations account for over half (59.2%) of all cluster employment. The table provides employment level trends by occupation within the cluster between 2018 - 2023, and projected employment by 2028 in order to identify growth trends and the potential for workforce strategies to address anticipated demand growth. The table also includes the number of people employed in that occupation in all industries in the MSA. This indicates the level of competition employers may face from industries outside the Health Care & Social Assistance cluster when hiring for key occupations.

Registered Nurses are the top occupation, with 31,875 employed in cluster in 2023, making up 11.3% of the cluster's total jobs. Employment of Home Health and Personal Care Aides has grown steadily since 2018, with an additional 16% growth expected between 2023 and 2028. A noteworthy trend is robust growth in Substance Abuse, Behavioral Disorder, and Mental Health Counselors (37% growth between 2018 and 2023, additional 17% projected by 2028), reflecting increasing demand for mental health services and ongoing adaptation within the healthcare workforce to meet evolving community needs.

Table 71 - Top 20 Health Care & Social Assistance Occupations, Washington DC MSA

Occupation	Employed in Cluster 2023	% Change 2018 - 2023	Projected % Change 2023 - 2028	% of Total Jobs in Industry 2023	All Jobs for Occupation in MSA 2023	County Resident Workers 2023
Registered Nurses	31,875	4%	8%	11.3%	49,106	8,108
Home Health and Personal Care Aides	23,320	5%	16%	8.3%	52,449	7,906
Nursing Assistants	18,961	(14%)	4%	6.7%	24,201	3,711
Medical Assistants	11,962	6%	12%	4.2%	13,352	2,076
Medical Secretaries and Administrative Assistants	9,360	29%	8%	3.3%	10,695	1,461
Receptionists and Information Clerks	8,631	(14%)	7%	3.1%	21,200	2,839
Medical and Health Services Managers	7,131	19%	16%	2.5%	11,990	2,060
Dental Assistants	6,329	12%	8%	2.2%	7,000	925
Licensed Practical and Licensed Vocational Nurses	5,926	(21%)	12%	2.1%	8,967	1,282
Dentists, General	4,763	32%	5%	1.7%	4,940	597
Clinical Laboratory Technologists and Technicians	4,645	(8%)	6%	1.6%	6,883	992
Physicians, All Other	4,609	25%	5%	1.6%	9,624	1,637
First-Line Supervisors of Office and Administrative Support Workers	4,329	(3%)	4%	1.5%	28,701	3,979
Substance Abuse, Behavioral Disorder, and Mental Health Counselors	4,072	37%	17%	1.4%	7,153	1,050
Nurse Practitioners	4,018	65%	28%	1.4%	4,546	662
Office Clerks, General	3,971	(9%)	4%	1.4%	50,646	5,892
Physical Therapists	3,546	(9%)	11%	1.3%	4,255	652
Dental Hygienists	3,523	(18%)	9%	1.2%	3,705	507
Physician Assistants	3,075	44%	17%	1.1%	3,593	584
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	3,047	(15%)	0%	1.1%	42,194	7,331

Source: Lightcast

Occupational Supply & Demand

Table 72 provides insight into the supply and demand dynamics for various occupations within the Health Care & Social Assistance industry cluster in the Washington-Arlington-Alexandria MSA. The table highlights occupations where there is a significant gap between the estimated active supply (the number of individuals currently employed or available in the workforce) and the estimated active demand (the number of positions currently needed by employers).

The largest supply/demand gap is for Registered Nurses with an estimated regional supply of 1,079 individuals compared to demand for 11,144 positions, indicating a substantial deficit of 10,065 professionals. This shortage trend extends to other critical roles such as Medical and Health Services Managers, Licensed Practical and Licensed Vocational Nurses, Nursing Assistants, and Medical Assistants, highlighting acute challenges in staffing for direct patient care.

Table 72 - Health Care & Social Assistance Industry Cluster Largest Occupation Supply Gaps, Washington DC MSA

Occupation	Active Supply Estimate	Active Demand Estimate	Supply / Demand Gap
Registered Nurses	1,079	11,144	(10,065)
Medical and Health Services Managers	836	3,634	(2,797)
Licensed Practical and Licensed Vocational Nurses	138	1,620	(1,481)
Nursing Assistants	523	1,976	(1,453)
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	2,438	3,612	(1,174)
Preschool Teachers, Except Special Education	140	1,248	(1,108)
Medical Assistants	398	1,358	(960)
Clinical Laboratory Technologists and Technicians	185	1,036	(851)
Nurse Practitioners	97	846	(749)
Medical Secretaries and Administrative Assistants	481	1,144	(663)
Substance Abuse, Behavioral Disorder, and Mental Health Counselors	261	883	(622)
Physicians, All Other	183	765	(582)

Source: Lightcast

Skills

Understanding the top skills requested by employers in key industry clusters is important for identifying skills gaps, aligning training and educational programs to meet industry needs, promoting career pathways, and supporting collaborative industry partnership initiatives.

Table 73 - Top Requested Skills for Most In-Demand Occupations, Health Care & Social Assistance Cluster, Washington DC MSA

Top Cluster Occupation	Top Requested Skills
Registered Nurses	• Nursing • Nursing Care • CPR • Acute Care • Clinical Nursing
Home & Health Aides	• Caregiving • Meal Planning & Preparation • Personal Care • Companionship • Housekeeping
Nursing Assistants	• Nursing • Activities of Daily Living (ADLs) • Vital Signs • Personal Care • Housekeeping

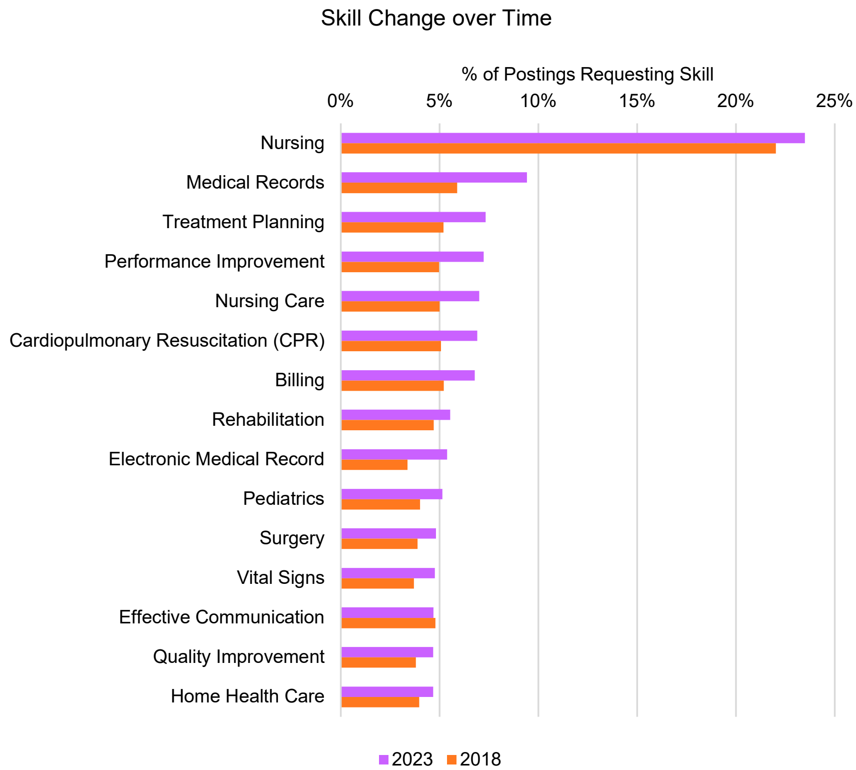
Source: Lightcast

Figure 94 shows the change in employer demand for top Healthcare and Social Assistance cluster skills measured by comparing the percent of local job postings in the industry cluster that requested that skill in 2018 and 2023. All 15 of the top skills grew in demand, including Nursing, Medical Records, Treatment Planning, Performance Improvement, Nursing Care, Cardiopulmonary Resuscitation (CPR), and Billing.

Figure 95 highlights differences in the regional (MSA) and national labor markets by comparing the percent of job postings that requested key skills in Washington, D.C. MSA versus the United States. As the chart shows, demand for Nursing, Nursing Care, and Home Health Care is underrepresented in the MSA compared to the United States, while Performance Improvement, Cardiopulmonary

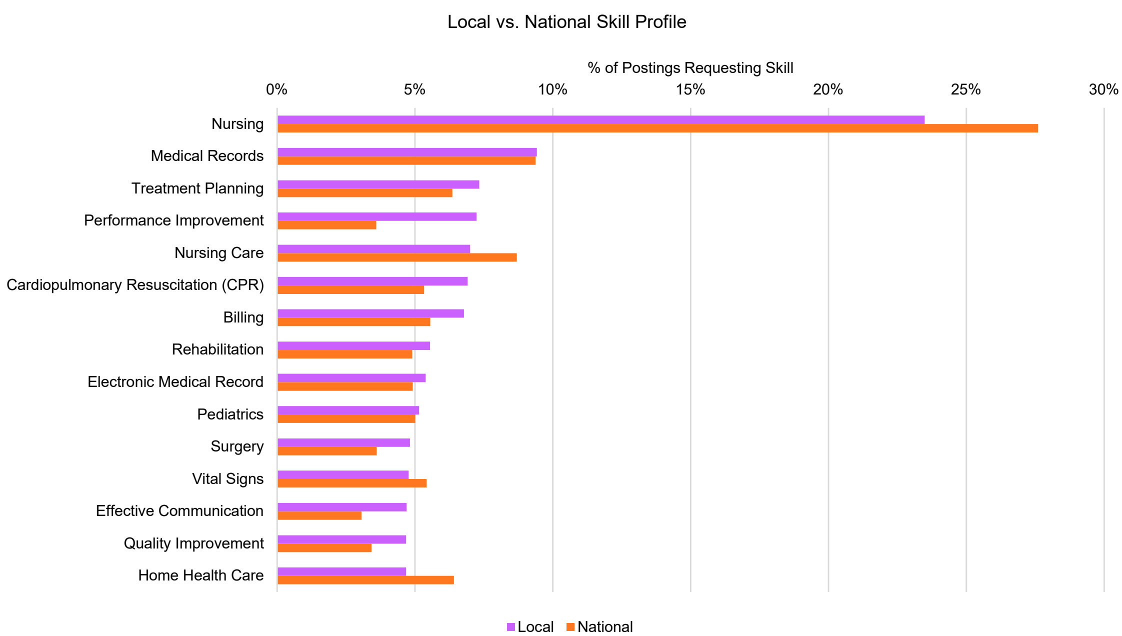
Resuscitation (CPR), Billing, Surgery, Effective Communication, and Quality Improvement skills are requested in a higher percentage of job postings in the MSA than in the United States overall.

Figure 94 - Skill Demand Change of Top Cluster Skills, Washington DC MSA



Source: Lightcast

Figure 95 - Regional vs. National Skill Demand, Health Care & Social Assistance Cluster



Source: Lightcast

Industry Employer Feedback

Roundtable discussions were held June 24-25, 2024 with Employ Prince George's industry partners in order to solicit employer feedback on: (1) demand projections; (2) their top workforce challenges; (3) current and future skills demand; (4) the impacts of technology/automation; and (5) their perceptions of local workforce capacity, workforce partners/programs, and higher education/ training alignment with industry needs.

Employers convened represented a variety of subsectors in the Healthcare cluster, including hospital systems, physician's offices, pharmacy (CVS), and services to individuals with disabilities. Their experience largely aligns to the supply/demand data shared above, with reported difficulty hiring and retaining Medical Assistants, Registered Nurses, Physicians, Pharmacy Technicians, Pharmacists, and community support workers.

At all levels, candidate shortages and wage competition impact employers' ability to attract and retain talent. One shared: "We're all competing against each other, and this drives up salaries, benefits, and incentives." High turnover for Medical Assistants, in particular, was attributed to wage sensitivity, with some leaving roles for an additional $1-$2/hour. Ongoing disruption in healthcare business models affects employers' ability to attract and retain Physicians and Registered Nurses in certain settings, for example a community-based clinic versus a large hospital system.

Healthcare employers joined the consensus across industry clusters on a shortage of "soft" skills in the local and regional workforce, including reliability, communication, problem solving, and attention to detail. This is a particular concern in Healthcare and Social Assistance where soft skills were characterized as "imperative." Turnover in entry-level frontline roles is reported to be high and related to a disconnect between expectations and the realities of frontline work. One employer vets candidates for the healthcare "mindset," described as a collection of interests, aptitudes, and other personality characteristics that align well with the nature of patient care. Surprisingly, there was very little feedback on the impact of technology/automation on operations or the workforce needs in healthcare and social assistance.

Without exception, employers felt that local and regional education and training programs are strong, confer the right technical skills, and work closely to ensure the success of trainees, once on the job. One hires Medical Assistants almost exclusively in Prince George's County due to the strong pipeline out of local training programs. Apprenticeships are a growing strategy to address workforce and training gaps in healthcare, with success cited in both clinical and non-clinical roles. Employ Prince George's has been helpful in several cases as a liaison between employers and the state agency where apprenticeships are registered.

Unfortunately, the success of local training partnerships has not been enough to overcome the perceived soft skills gap and disconnect between new-hire expectations and the realities of work in healthcare. There was discussion on the need to build awareness of the many different career pathways in the Healthcare and Social Assistance cluster, including information technology, financial, HR, marketing, and operations roles, beginning as early as middle school. Employers would also like to see more programming that prepares individuals specifically for the world of work in a healthcare setting.

Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services

Overview

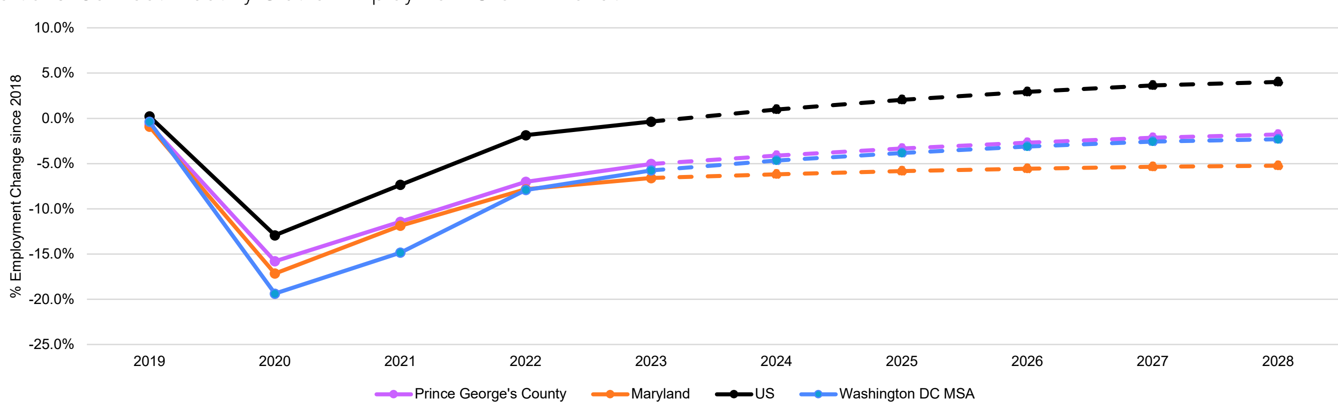
For this analysis, a custom definition of the Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services industry cluster includes the following NAICS industry classification codes:

- **NAICS 44-45:** The Retail Trade sector encompasses establishments primarily engaged in retailing merchandise and goods to the general public. It includes a wide range of establishments such as department stores, grocery stores, specialty stores (e.g., electronics, furniture), and other retail outlets.
- **NAICS 71:** The Arts, Entertainment, and Recreation comprises establishments involved in providing cultural, recreational, and entertainment services. It includes establishments such as theaters, museums, art galleries, amusement parks, sports teams and clubs, casinos, and other recreational facilities.
- **NAICS 72:** The Accommodation and Food Services sector includes establishments primarily engaged in providing lodging and/or preparing meals, snacks, and beverages for immediate consumption. It encompasses a wide range of businesses such as hotels, motels, bed-and-breakfast inns, restaurants, cafes, bars, and catering services.
- **NAICS 812:** The Personal and Laundry Services sector includes establishments primarily engaged in providing personal care services and laundry services. It covers businesses such as hair and nail salons, barbershops, beauty salons, dry cleaning and laundry services (except coin-operated), funeral homes, and other personal care services.

Employment Growth

As Figure 96 shows below, employment in the Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services cluster saw double-digit contraction in Prince George's County in 2020 and 2021, with continued job losses every year since. While not as drastic as the percentage decline across the Washington, DC MSA and the state of Maryland, conditions in Prince George's County are projected to significantly lag the national job recovery in this cluster. A comprehensive economic and workforce strategy should focus on mitigating the impacts of this decline on local business districts and the regional workforce.

Figure 96 - Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services Industry Cluster Employment Growth Trends



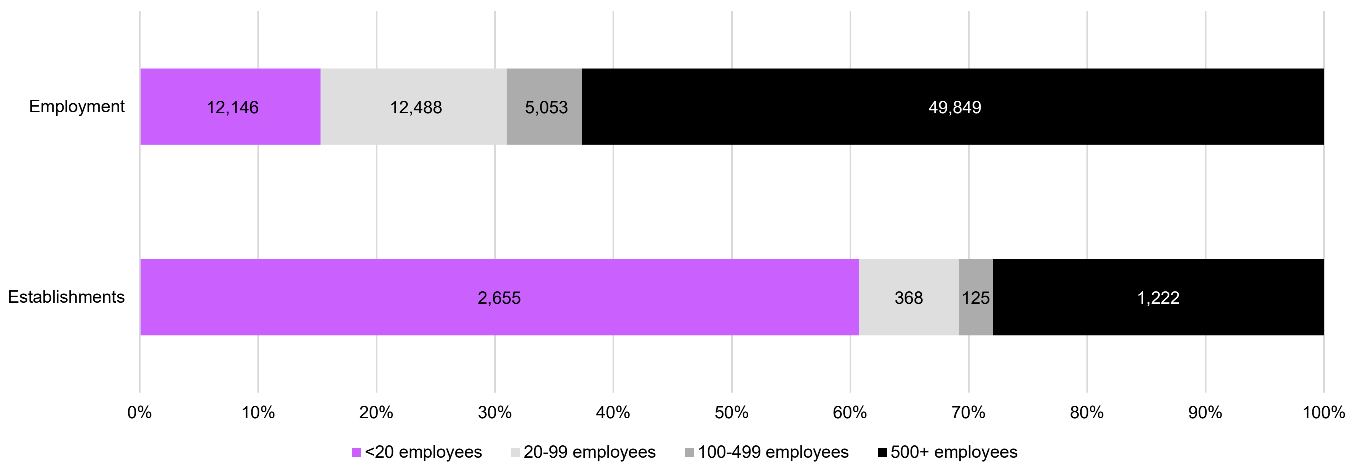
Source: Lightcast

Employment by Establishment Size

As Figures 97 and 98 below show, the distribution of employment and number of establishments by establishment size is similar between Prince George's County and MSA. Compared to other clusters, the share of establishments with 500 or more employees is larger (with the exception of the Information cluster, where it is the majority). There are 2,655 cluster establishments in Prince George's County (61% of the cluster total) that have fewer than 20 employees, while 28% of establishments in the cluster have 500 or more employees. Despite this, establishments of 500 or more employees account for the largest share of total cluster employment (63%, or almost 50,000 employees). Establishments with fewer than 20 employees account for just 15% of total employment (12,146 employees).

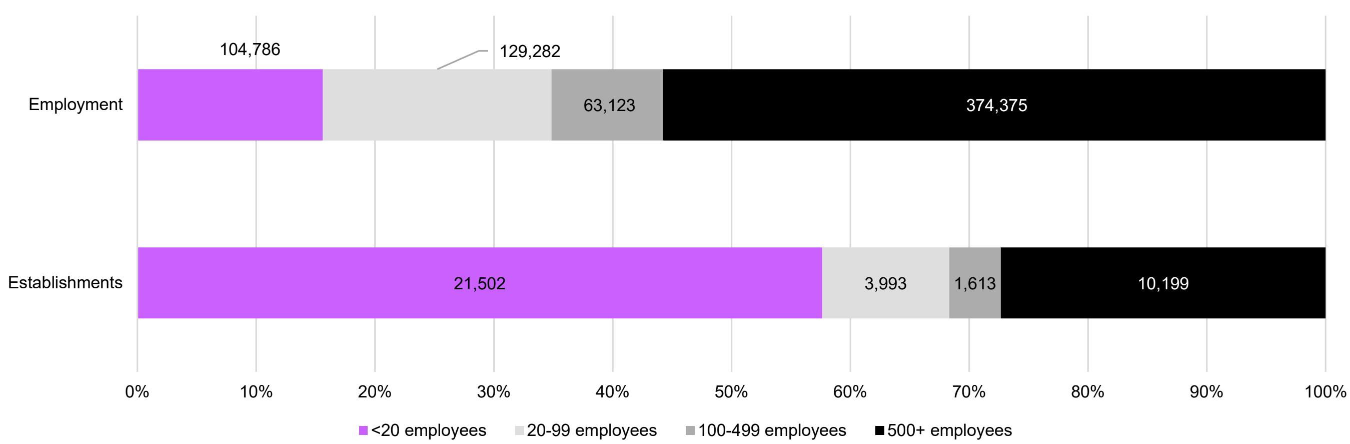
At the MSA level, roughly 58% of cluster establishments have fewer than 20 employees. Yet this establishment size only accounts for 104,786 employees, or 16% of total cluster employment. Establishments with 500 or more employees account for 27% of total cluster establishments but 56% of cluster employment (374,375 employees).

Figure 97 - Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services Employment and Establishments by Establishment Size, Prince George's County, 2020



Source: Lightcast

Figure 98 - Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services Employment and Establishments by Establishment Size, Washington DC MSA, 2020



Source: Lightcast

Cluster Subsector Analysis

Subsector Key Metrics

One hundred six (106) 6-digit industry subsectors comprise the Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services industry cluster in Prince George's County. See Table 74 below for the full list of industry subsectors, ranked by 2023 employment size. Included in Table 74 are each subsector's average earnings, total 2022 gross regional product (GRP) and the subsector's share of total GRP for the Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services cluster.

Restaurants, either limited- or full-service, lead employment in the cluster and provide a combined 17.4% of the cluster's overall GRP. Supermarkets and Other Grocery Stores and Department Stores contribute another 11,000 jobs and 10.9% of the cluster GRP, when combined. Low average wages in the top four subsectors should be considered when developing a growth strategy for the cluster, as workforce shortages across the labor market have intensified competition on wages, benefits, and other work preferences (e.g., flexible scheduling, ability to work from home). In certain cases, automation of routine tasks/roles may be a solution to maintain competitiveness and redirect resources towards higher-value activities.

Subsectors that offer higher average earnings, including New Car Dealers ($95,852), Hotels ($61,402) and Casino Hotels ($63,802), may offer more robust career opportunities for those with skills, interests, and aptitudes aligned to service industries.

Table 74 - Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services Subsectors, Prince George's County

NAICS	Description	2023 Jobs	Average Earnings	2022 GRP	Share of Cluster GRP
722513	Limited-Service Restaurants	12,264	$26,348	$711,572,410	10.8%
722511	Full-Service Restaurants	8,223	$31,610	$435,334,522	6.6%
445110	Supermarkets and Other Grocery (except Convenience) Stores	6,965	$44,718	$487,465,377	7.4%
455110	Department Stores	4,250	$35,053	$227,996,590	3.5%
721110	Hotels (except Casino Hotels) and Motels	3,171	$61,402	$402,876,195	6.1%
721120	Casino Hotels	3,170	$63,802	$404,470,226	6.1%
441110	New Car Dealers	2,560	$95,852	$467,497,742	7.1%
444110	Home Centers	2,454	$44,457	$238,005,089	3.6%
458110	Clothing and Clothing Accessories Retailers	2,129	$26,729	$140,880,141	2.1%
812112	Beauty Salons	1,511	$36,011	$94,632,665	1.4%
456110	Pharmacies and Drug Retailers	1,499	$54,527	$154,024,907	2.3%
449110	Furniture Retailers	1,422	$54,360	$121,597,339	1.8%
722515	Snack and Nonalcoholic Beverage Bars	1,391	$30,081	$38,740,119	0.6%
455211	Warehouse Clubs and Supercenters	1,356	$48,117	$114,431,846	1.7%
445131	Convenience Retailers	1,304	$34,371	$83,487,878	1.3%
713990	All Other Amusement and Recreation Industries	1,276	$33,301	$48,290,747	0.7%
444180	Other Building Material Dealers	1,206	$88,757	$227,032,447	3.4%
455219	All Other General Merchandise Retailers	1,141	$37,885	$91,315,117	1.4%
441330	Automotive Parts and Accessories Retailers	1,128	$43,962	$102,723,765	1.6%
457110	Gasoline Stations with Convenience Stores	1,046	$31,577	$97,280,823	1.5%
722320	Caterers	1,039	$49,771	$64,726,960	1.0%
722310	Food Service Contractors	971	$42,126	$54,745,636	0.8%

NAICS	Description	2023 Jobs	Average Earnings	2022 GRP	Share of Cluster GRP
713940	Fitness and Recreational Sports Centers	966	$24,059	$29,126,380	0.4%
449210	Electronics and Appliance Retailers	942	$70,318	$137,759,566	2.1%
456120	Cosmetics, Beauty Supplies, and Perfume Retailers	848	$33,122	$51,036,745	0.8%
812113	Nail Salons	808	$44,437	$62,262,596	0.9%
445320	Beer, Wine, and Liquor Retailers	799	$46,084	$64,584,011	1.0%
458210	Shoe Retailers	762	$26,883	$36,937,838	0.6%
713110	Amusement and Theme Parks	751	$26,540	$39,938,856	0.6%
459510	Used Merchandise Retailers	748	$34,255	$48,143,708	0.7%
711510	Independent Artists, Writers, and Performers	733	$34,427	$44,258,951	0.7%
812990	All Other Personal Services	558	$27,493	$82,877,158	1.3%
812332	Industrial Launderers	510	$80,998	$41,488,306	0.6%
812320	Drycleaning and Laundry Services (except Coin-Operated)	472	$38,355	$21,039,528	0.3%
441120	Used Car Dealers	457	$62,256	$76,502,118	1.2%
711211	Sports Teams and Clubs	455	$64,773	$37,362,719	0.6%
445230	Fruit and Vegetable Markets	397	$100,401	$58,111,889	0.9%
812310	Coin-Operated Laundries and Drycleaners	386	$40,394	$18,424,448	0.3%
459110	Sporting Goods Retailers	329	$47,214	$27,072,707	0.4%
812111	Barber Shops	323	$32,900	$20,999,866	0.3%
812331	Linen Supply	316	$74,932	$25,115,392	0.4%
445132	Vending Machine Operators	312	$71,920	$53,764,162	0.8%
441340	Tire Dealers	308	$59,051	$38,916,688	0.6%
722410	Drinking Places (Alcoholic Beverages)	302	$28,737	$10,774,859	0.2%
711212	Racetracks	296	$43,095	$13,091,743	0.2%
459910	Pet and Pet Supplies Retailers	286	$42,119	$22,811,439	0.3%
812210	Funeral Homes and Funeral Services	286	$72,242	$46,026,194	0.7%
457120	Other Gasoline Stations	276	$47,751	$35,789,923	0.5%
459999	All Other Miscellaneous Retailers	258	$60,689	$45,973,305	0.7%
713910	Golf Courses and Country Clubs	242	$33,726	$11,526,333	0.2%
458310	Jewelry Retailers	238	$39,581	$20,252,271	0.3%
812930	Parking Lots and Garages	220	$55,045	$11,439,358	0.2%
444120	Paint and Wallpaper Stores	195	$83,748	$48,220,373	0.7%
459410	Office Supplies and Stationery Retailers	194	$35,530	$14,344,721	0.2%
459120	Hobby, Toy, and Game Retailers	193	$27,123	$10,922,690	0.2%
459420	Gift, Novelty, and Souvenir Retailers	191	$47,274	$19,246,620	0.3%
722330	Mobile Food Services	180	$44,047	$7,640,128	0.1%
444240	Nursery, Garden Center, and Farm Supply Retailers	176	$59,684	$24,289,176	0.4%
456130	Optical Goods Retailers	167	$53,341	$15,553,892	0.2%
812910	Pet Care (except Veterinary) Services	164	$37,153	$11,028,287	0.2%
812199	Other Personal Care Services	160	$32,233	$17,119,093	0.3%
444140	Hardware Retailers	151	$66,725	$26,237,666	0.4%
459210	Book Retailers and News Dealers	136	$34,166	$11,726,790	0.2%
445298	All Other Specialty Food Retailers	136	$33,668	$10,640,985	0.2%
459310	Florists	133	$51,040	$10,799,726	0.2%

NAICS	Description	2023 Jobs	Average Earnings	2022 GRP	Share of Cluster GRP
812220	Cemeteries and Crematories	133	$89,634	$23,929,452	0.4%
459140	Musical Instrument and Supplies Retailers	129	$32,493	$6,652,083	0.1%
711219	Other Spectator Sports	124	$47,876	$11,802,220	0.2%
713120	Amusement Arcades	120	$20,125	$4,605,396	0.1%
456191	Food (Health) Supplement Retailers	117	$39,103	$9,602,086	0.1%
457210	Fuel Dealers	113	$77,260	$21,940,380	0.3%
722514	Cafeterias, Grill Buffets, and Buffets	111	$36,307	$4,431,700	0.1%
713950	Bowling Centers	109	$30,971	$4,073,281	0.1%
445250	Fish and Seafood Retailers	109	$49,487	$8,261,100	0.1%
456199	All Other Health and Personal Care Retailers	106	$193,564	$44,669,640	0.7%
449121	Floor Covering Retailers	103	$69,878	$17,065,710	0.3%
812191	Diet and Weight Reducing Centers	101	$45,436	$5,781,639	0.1%
459991	Tobacco, Electronic Cigarette, and Other Smoking Supplies Retailers	95	$36,078	$25,578,286	0.4%
449129	All Other Home Furnishings Retailers	89	$38,259	$9,125,820	0.1%
713290	Other Gambling Industries	88	$43,999	$14,668,631	0.2%
444230	Outdoor Power Equipment Retailers	77	$79,004	$8,210,987	0.1%
711130	Musical Groups and Artists	70	$31,487	$5,267,680	0.1%
449122	Window Treatment Retailers	56	$69,840	$4,465,777	0.1%
459130	Sewing, Needlework, and Piece Goods Retailers	54	$34,507	$4,514,460	0.1%
441227	Motorcycle, ATV, and All Other Motor Vehicle Dealers	51	$68,549	$8,445,757	0.1%
445292	Confectionery and Nut Stores	45	$22,099	$4,220,230	0.1%
711110	Theater Companies and Dinner Theaters	40	$28,788	$2,441,046	0.0%
712120	Historical Sites	40	$54,867	$3,134,259	0.0%
721310	Rooming and Boarding Houses, Dormitories, and Workers' Camps	40	$31,028	$6,065,016	0.1%
445291	Baked Goods Stores	37	$23,315	$5,384,177	0.1%
711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities	36	$52,790	$3,965,746	0.1%
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities	35	$34,636	$9,978,345	0.2%
721211	RV (Recreational Vehicle) Parks and Campgrounds	35	$46,126	$3,253,288	0.0%
712110	Museums	33	$58,462	$3,266,722	0.0%
721214	Recreational and Vacation Camps (except Campgrounds)	29	$28,426	$1,863,642	0.0%
445240	Meat Retailers	28	$41,188	$2,395,709	0.0%
711410	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	25	$34,551	$11,728,297	0.2%
713930	Marinas	24	$35,495	$2,827,527	0.0%
711190	Other Performing Arts Companies	22	$38,406	$2,107,928	0.0%
711120	Dance Companies	22	$30,271	$1,611,174	0.0%
721191	Bed-and-Breakfast Inns	20	$28,671	$2,273,485	0.0%
441210	Recreational Vehicle Dealers	14	$141,126	$2,465,312	0.0%
458320	Luggage and Leather Goods Retailers	13	$40,417	$1,123,350	0.0%
459920	Art Dealers	10	$38,108	$5,362,614	0.1%

Source: Lightcast

Strong, Emerging, Threatened Subsectors

Lightcast's analysis includes an assessment of Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services industry subsectors relative to their concentration in the county or the MSA and the projected growth/decline in jobs and concentration.

At the county level, strong industry subsectors are defined as having a location quotient (LQ) of 1.1 or higher in 2023 and projected job growth of > 20 jobs by 2028. At the MSA level, strong industry subsectors are defined as having a location quotient (LQ) of 1.1 or higher in 2023 and projected job growth of > 100 jobs by 2028.

Table 75 - STRONG Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services Industry Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
441330	Automotive Parts and Accessories Retailers	445131	Convenience Retailers
444110	Home Centers	445230	Fruit and Vegetable Markets
444120	Paint and Wallpaper Stores	445291	Baked Goods Stores
444180	Other Building Material Dealers	711211	Sports Teams and Clubs
445110	Supermarkets and Other Grocery (except Convenience) Stores	711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities
445131	Convenience Retailers	711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities
445132	Vending Machine Operators	713940	Fitness and Recreational Sports Centers
445230	Fruit and Vegetable Markets	722310	Food Service Contractors
445250	Fish and Seafood Retailers	722320	Caterers
449110	Furniture Retailers	812111	Barber Shops
456120	Cosmetics, Beauty Supplies, and Perfume Retailers	812910	Pet Care (except Veterinary) Services
458210	Shoe Retailers	812990	All Other Personal Services
711211	Sports Teams and Clubs		
713990	All Other Amusement and Recreation Industries		
721120	Casino Hotels		
722320	Caterers		
722513	Limited-Service Restaurants		
812113	Nail Salons		
812210	Funeral Homes and Funeral Services		
812310	Coin-Operated Laundries and Drycleaners		
812331	Linen Supply		
812332	Industrial Launderers		
812990	All Other Personal Services		

Source: Lightcast

At the county level, emerging industry subsectors are defined as having a location quotient (LQ) between 0.90 and 1.1, a growing LQ, and projected growth of at least 20 jobs by 2028. At the MSA level, emerging industry subsectors are defined as having a location quotient (LQ) between 0.90 and 1.1, a growing LQ, and projected growth of at least 100 jobs by 2028.

Table 76 - EMERGING Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services Industry Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
721110	Hotels (except Casino Hotels) and Motels	444240	Nursery, Garden Center, and Farm Supply Retailers
		445110	Supermarkets and Other Grocery (except Convenience) Stores
		445298	All Other Specialty Food Retailers
		712110	Museums
		721120	Casino Hotels
		722511	Full-Service Restaurants

Source: Lightcast

At the county level, threatened industry subsectors are defined as having a location quotient (LQ) of .90 or lower in 2023 and projected job decline of 20 or more jobs by 2028. At the MSA level, threatened industry subsectors are defined as having a location quotient (LQ) of .90 or lower in 2023 and projected job decline of 100 or more jobs by 2028.

Table 77 - THREATENED Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services Industry Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
441110	New Car Dealers	449129	All Other Home Furnishings Retailers
445320	Beer, Wine, and Liquor Retailers	449210	Electronics and Appliance Retailers
449210	Electronics and Appliance Retailers	455110	Department Stores
455110	Department Stores	459210	Book Retailers and News Dealers
456110	Pharmacies and Drug Retailers	812320	Drycleaning and Laundry Services (except Coin-Operated)
457120	Other Gasoline Stations	812930	Parking Lots and Garages
458110	Clothing and Clothing Accessories Retailers		
459410	Office Supplies and Stationery Retailers		
459510	Used Merchandise Retailers		
711212	Racetracks		
713110	Amusement and Theme Parks		
812112	Beauty Salons		

Source: Lightcast

Subsectors with High Concentration

In Prince George's County, a number of subsectors within the Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services cluster have significant employment concentrations, indicating that a larger proportion of the workforce is employed in that subsector in the county as compared to the average region. A high concentration of jobs indicates potential areas of strength and specialization within the cluster, including Casino Hotels (concentration of 6.12 or 6+ times the national average), Racetracks (5.01), Fruit and Vegetable Markets (4.73), Coin-Operated Laundries and Drycleaners (4.06), and Industrial Launderers (3.61).

Table 78 - Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services Subsectors with High Concentration of Employment, Prince George's County

Industry Subsector	2023 Jobs	2023 Employment Concentration
Casino Hotels	3,170	6.12
Racetracks	296	5.01
Fruit and Vegetable Markets	397	4.73
Coin-Operated Laundries and Drycleaners	386	4.06
Industrial Launderers	510	3.61
Vending Machine Operators	312	3.58
Convenience Retailers	1,304	3.31
Fish and Seafood Retailers	109	3.15
Furniture Retailers	1,422	2.85
Linen Supply	316	2.27
Caterers	1,039	2.18
All Other Amusement and Recreation Industries	1,276	2.17
Diet and Weight Reducing Centers	101	2.17
Drycleaning and Laundry Services (except Coin-Operated)	472	2.14
Paint and Wallpaper Stores	195	2.07
Other Building Material Dealers	1,206	2.05
Department Stores	4,250	2.04
Cosmetics, Beauty Supplies, and Perfume Retailers	848	2.01
Coin-Operated Laundries and Drycleaners	386	4.06

Source: Lightcast

Occupations & Skills

Top Occupations

Table 79 lists the top 20 Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services occupations in Prince George's County. Together, these occupations account for 68% of all cluster employment. The table provides employment level trends by occupation within the cluster between 2018 - 2023, and projected employment by 2028 in order to identify growth trends and the potential for workforce strategies to address anticipated demand growth (or decline). The table also includes the number of people employed in that occupation in all industries in the county. This indicates the level of competition employers may face from industries outside the Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services cluster when hiring for key occupations.

Entry-level service jobs dominate the cluster's top occupations with Retail Salespersons, Cashiers, Fast Food and Counter Workers and Waiters and Waitresses (28,216 jobs, combined) comprising nearly 35% of employment in the cluster. There is fierce competition throughout the MSA for the top occupations, so wages and job quality factors (location, shifts, flexibility) will impact local employers' ability to recruit and retain talent.

Table 79 - Top 20 Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services Occupations, Prince George's County

Occupation	Employed in Cluster 2023	% Change 2018 - 2023	Projected % Change 2023 - 2028	% of Total Jobs in Industry 2023	All Jobs for Occupation in MSA 2023	County Resident Workers 2023
Retail Salespersons	8,843	(3%)	0%	10.9%	64,303	9,265
Cashiers	8,315	(24%)	(2%)	10.3%	61,158	9,058
Fast Food and Counter Workers	7,499	(8%)	2%	9.3%	60,413	8,218
Stockers and Order Fillers	4,236	12%	8%	5.2%	40,929	6,063
Waiters and Waitresses	3,559	(16%)	6%	4.4%	42,190	6,051
First-Line Supervisors of Retail Sales Workers	3,123	(11%)	1%	3.9%	23,309	3,392
First-Line Supervisors of Food Preparation and Serving Workers	2,412	16%	5%	3.0%	22,605	3,073
General and Operations Managers	2,353	69%	2%	2.9%	102,617	14,515
Cooks, Restaurant	2,329	33%	16%	2.9%	28,366	3,798
Food Preparation Workers	1,592	0%	3%	2.0%	17,463	2,640
Customer Service Representatives	1,532	21%	(2%)	1.9%	43,267	5,771
Hairdressers, Hairstylists, and Cosmetologists	1,494	(6%)	1%	1.8%	10,125	1,727
Dining Room and Cafeteria Attendants and Bartender Helpers	1,163	(4%)	9%	1.4%	11,572	1,964
Amusement and Recreation Attendants	1,090	10%	6%	1.3%	7,515	1,027
Cooks, Fast Food	1,022	12%	(3%)	1.3%	11,394	1,433
Driver/Sales Workers	971	(5%)	7%	1.2%	8,833	1,302
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	945	22%	6%	1.2%	9,857	1,475
Maids and Housekeeping Cleaners	842	(36%)	9%	1.0%	31,933	3,899
Bartenders	808	14%	11%	1.0%	11,365	1,884
Automotive Service Technicians and Mechanics	800	(8%)	(2%)	1.0%	14,306	1,957

Source: Lightcast

Occupational Supply & Demand

Table 80 provides insights into the supply and demand dynamics for various occupations within the Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services industry cluster in Prince George's County. The table highlights occupations where there is a significant gap between the estimated active supply (the number of individuals currently employed or available in the workforce) and the estimated active demand (the number of positions currently needed by employers).

First-Line Supervisors of Retail Sales Workers face the largest gap (-2,979), followed closely by Retail Salespersons (-2,929). Key food services roles including Waiters and Waitresses, Fast Food and Counter Workers, Cooks, First-Line Supervisors, Bartenders, and Hosts/Hostesses are severely undersupplied, an ongoing threat to the industry's growth.

Table 80 - Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services Industry Cluster Largest Supply-Demand Gaps, Prince George's County

Occupation	Active Supply Estimate	Active Demand Estimate	Supply / Demand Gap
First-Line Supervisors of Retail Sales Workers	1,033	4,012	(2,979)
Retail Salespersons	2,646	5,575	(2,929)
Waiters and Waitresses	839	2,233	(1,394)
Fast Food and Counter Workers	1,229	2,612	(1,383)
Cooks, Restaurant	520	1,587	(1,067)
First-Line Supervisors of Food Preparation and Serving Workers	505	1,554	(1,049)
Bartenders	233	1,026	(792)
Automotive Service Technicians and Mechanics	395	1,142	(747)
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	216	929	(713)
Dining Room and Cafeteria Attendants and Bartender Helpers	207	800	(593)
Driver/Sales Workers	269	702	(433)
Maids and Housekeeping Cleaners	869	1,260	(392)

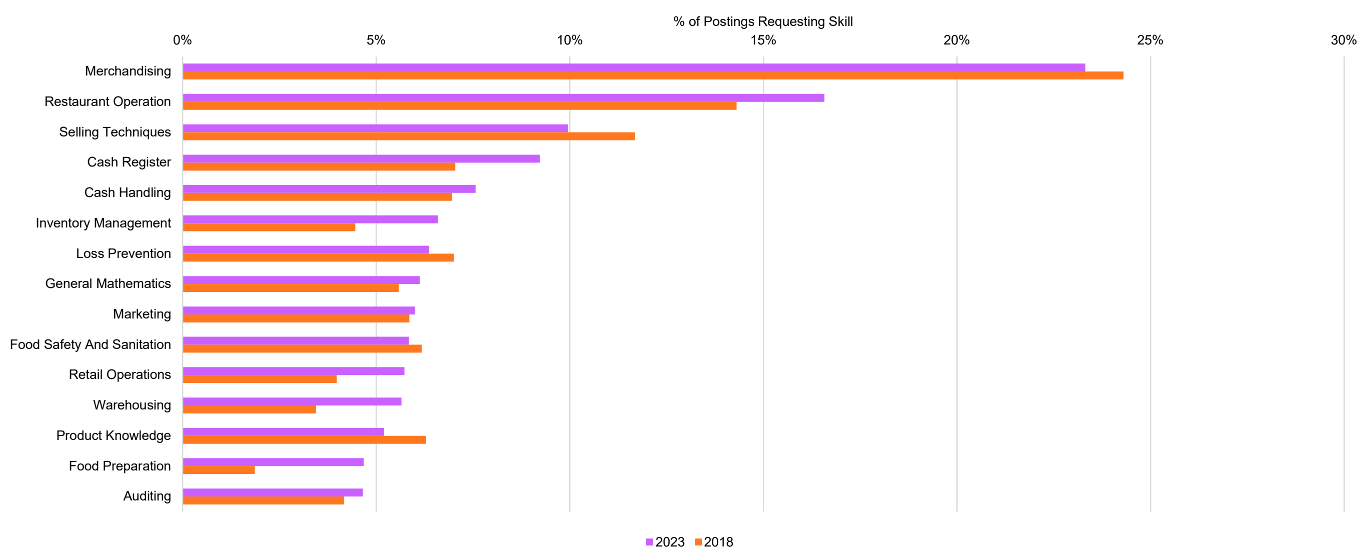
Source: Lightcast

Skills

Understanding the top skills requested by employers in key industry clusters is important for identifying skills gaps, aligning training and educational programs to meet industry needs, promoting career pathways, and supporting collaborative industry partnership initiatives.

Figure 99 shows the change in employer demand for top Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, and Personal Services skills measured by comparing the percent of local job postings in the industry cluster that requested that skill in 2018 and 2023. Key skills that are growing in demand include Restaurant Operation, Cash Register, Inventory Management, Warehousing, and Food Preparation. Skills less in demand in 2023 included Merchandising, Selling Techniques, and Product Knowledge, reflecting a diminished frontline retail workforce.

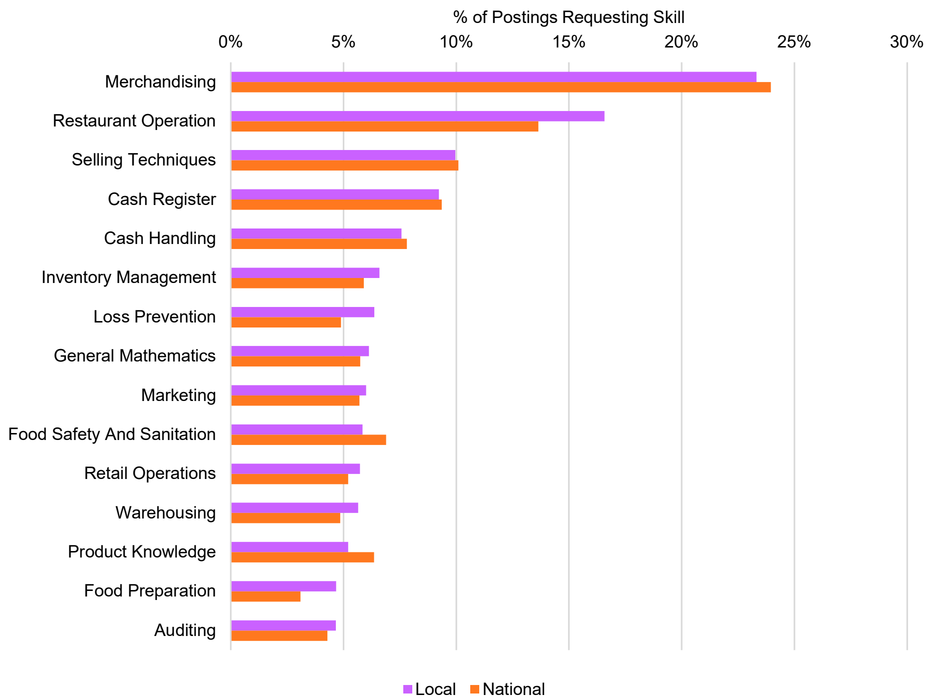
Figure 99 - Skill Demand Change of Top Cluster Skills, Washington DC MSA



Source: Lightcast

Figure 100 highlights differences in the regional (MSA) and national labor markets by comparing the percent of job postings that requested key skills in Washington, D.C. MSA versus the United States. As the chart shows, demand in the MSA mostly aligns with the United States, aside from slightly higher local demand for Restaurant Operation and Food Preparation skills.

Figure 100 - Regional vs. National Skill Demand, Retail, Accommodation & Food Services, Arts, Entertainment, & Recreation, Personal Services Cluster



Source: Lightcast

Industry Employer Feedback

Roundtable discussions were held June 24-25, 2024 with Employ Prince George's industry partners in order to solicit employer feedback on: (1) demand projections; (2) their top workforce challenges; (3) current and future skills demand; (4) the impacts of technology/automation; and (5) their perceptions of local workforce capacity, workforce partners/programs, and higher education/training alignment with industry needs.

Employers representing restaurants and hotels in the area shared best practices for working around a chronic shortage of frontline workers, and high turnover in key customer-facing roles.

The preferences of frontline workers have changed since the pandemic, with many seeking higher wages, more flexibility, and the ability to choose their own schedule. As a result of this continuing trend toward agency and flexibility, employers identify gig work platforms like Uber, Lyft, and DoorDash as significant competitors for scarce talent. High transportation or parking costs for employees can be an additional disincentive as candidates consider their many employment options.

A hotel employer shared their company's philosophy to "hire for attitude, train on skills." Hospitality and culinary apprenticeships (offered through Prince George's Community College) were noted as a way to increase retention and foster ongoing skills development and several employers partner directly with local high schools to foster a pipeline of young workers and provide foundational employability skills. Many companies offer tuition reimbursement for associates seeking career advancement, although one fast food employer noted that few graduates stay with the company after receiving a degree. Employers reported little to no workforce impact from automation or new technologies, surprising given the protracted nature of frontline staffing shortages.

Government (Excluding Education)

Overview

For this analysis, a custom definition of the Government industry cluster includes the following NAICS industry classification codes:

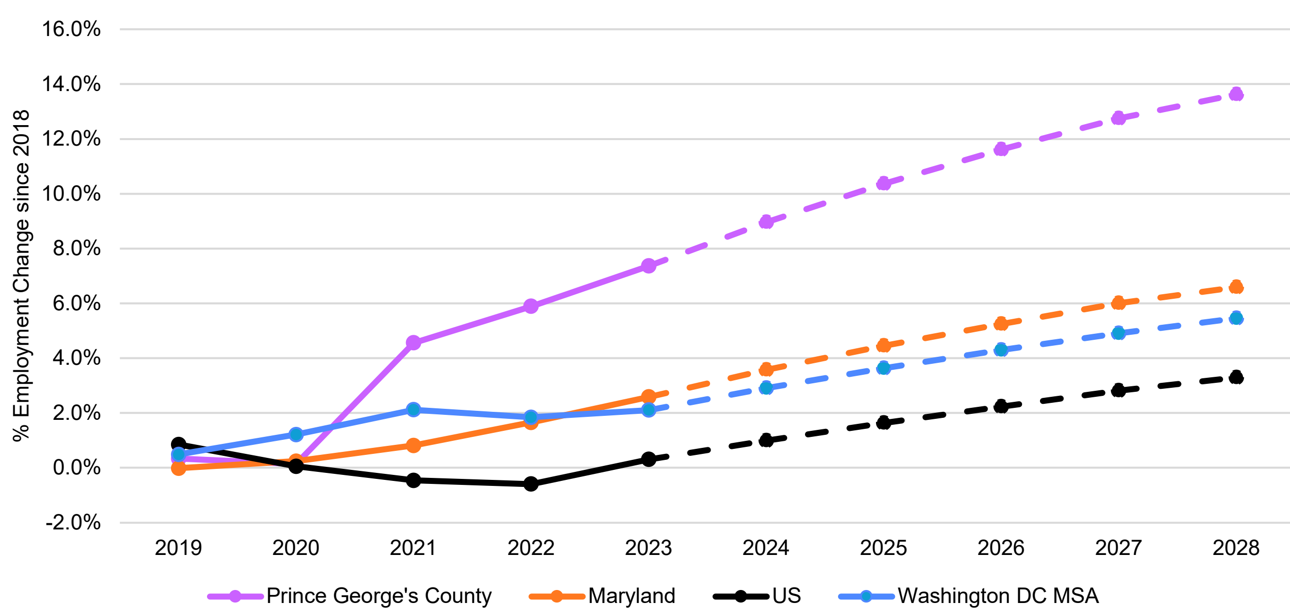
NAICS 90: Government, excluding[21]:

- NAICS 902611 Elementary and Secondary Schools (State Government)
- NAICS 902612 Colleges, Universities, and Professional Schools (State Government)
- NAICS 902619 All Other Schools and Educational Support Services (State Government)
- NAICS 903611 Elementary and Secondary Schools (Local Government)
- NAICS 903612 Colleges, Universities, and Professional Schools (Local Government)
- NAICS 903619 All Other Schools and Educational Support Services (Local Government)

Employment Growth

As Figure 101 shows below, employment in the Government sector in Prince George's County has grown at a substantially faster rate than the Washington, D.C. MSA, the state of Maryland, and the United States since 2020, and is projected to experience double-digit growth each year between 2025 and 2028. This trend should further strengthen local employment concentrations in Government subsectors noted above.

Figure 101 - Government Industry Cluster Employment Growth Trends



Source: Lightcast

21 Note: Lightcast NAICS for Government may differ from official BLS codes

Cluster Subsector Analysis

Subsector Key Metrics

In the Washington-Arlington-Alexandria MSA, three Government subsectors have greater-than -average employment concentrations, including the Federal Government, Civilian with an employment concentration 7.57 times higher than the average for any region in the United States. Of particular interest is the higher-than-average concentration of employment within the United States Postal Service, a subsector identified as "threatened" in the above analysis. This designation underscores the urgency for targeted economic and workforce development strategies aimed at enhancing the subsector's resilience in the face of challenges such as technological disruption and shifting consumer behaviors. Workforce development efforts should aim to upskill or reskill workers within the Postal Service, equipping them with the capabilities needed to navigate industry transitions.

Table 81 - Government Subsectors with High Concentration of Employment, Washington DC MSA

Industry Subsector	2023 Jobs	2023 Employment Concentration
Federal Government, Civilian, Excluding Postal Service	379,679	7.57
Federal Government, Military	66,576	1.71
US Postal Service	15,139	1.21

Source: Lightcast

Strong, Emerging, Threatened Subsectors

Lightcast's analysis includes an assessment of Government industry subsectors relative to their concentration in the county or the MSA and the projected growth/decline in jobs and concentration.

At the county level, strong industry subsectors are defined as having a location quotient (LQ) of 1.1 or higher in 2023 and projected job growth of > 20 jobs by 2028. At the MSA level, strong industry subsectors are defined as having a location quotient (LQ) of 1.1 or higher in 2023 and projected job growth of > 100 jobs by 2028.

Table 82 - STRONG Government Industry Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
901199	Federal Government, Civilian, Excluding Postal Service	901199	Federal Government, Civilian, Excluding Postal Service
901200	Federal Government, Military	901200	Federal Government, Military
903999	Local Government, Excluding Education and Hospitals		

Source: Lightcast

At the county level, emerging industry subsectors are defined as having a location quotient (LQ) between 0.90 and 1.1, a growing LQ, and projected growth of at least 20 jobs by 2028. At the MSA level, emerging industry subsectors are defined as having a location quotient (LQ) between 0.90 and 1.1, a growing LQ, and projected growth of at least 100 jobs by 2028.

Table 83 - EMERGING Government Services Industry Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
		903999	Local Government, Excluding Education and Hospitals

Source: Lightcast

At the county level, threatened industry subsectors are defined as having a location quotient (LQ) of .90 or lower in 2023 and projected job decline of 20 or more jobs by 2028. At the MSA level, threatened industry subsectors are defined as having a location quotient (LQ) of .90 or lower in 2023 and projected job decline of 100 or more jobs by 2028.

Table 84 - THREATENED Government Services Industry Subsectors

NAICS Code	Local Level (Prince George's County)	NAICS Code	Regional Level (MSA)
901149	US Postal Service	901149	US Postal Service

Source: Lightcast

Subsectors with High Concentration

Occupations & Skills

Top Occupations

Table 85 lists the top 20 Government occupations in the Washington-Arlington-Alexandria MSA. Together, these occupations account for just over half (50.2%) of all cluster employment. The table provides employment level trends by occupation within the cluster between 2018 - 2023, and projected employment to identify growth trends and the potential for workforce strategies to address anticipated demand growth (or decline). The table also includes the number of people employed in that occupation in all industries in the MSA. This indicates the level of competition employers may face from industries outside the Government cluster when hiring for key occupations.

Table 85 - Top 20 Government Occupations, Washington DC MSA

Occupation	Employed in Cluster 2023	% Change 2018 - 2023	Projected % Change 2023 - 2028	% of Total Jobs in Industry 2023	All Jobs for Occupation in MSA 2023	County Resident Workers 2023
Business Operations Specialists, All Other	50,062	20%	1%	8.3%	78,940	12,209
Military-only occupations	34,772	9%	4%	5.8%	34,772	8,481
Managers, All Other	26,541	(1%)	1%	4.4%	54,079	7,921
Management Analysts	25,742	19%	9%	4.3%	81,519	7,556
Computer Occupations, All Other	25,110	8%	9%	4.2%	39,972	6,390
Lawyers	18,802	2%	1%	3.1%	54,178	7,144
Police and Sheriff's Patrol Officers	16,474	(4%)	6%	2.7%	17,390	2,654
Registered Nurses	12,475	5%	2%	2.1%	49,106	8,108
General and Operations Managers	10,877	10%	2%	1.8%	102,617	14,515
Compliance Officers	10,195	5%	2%	1.7%	14,059	2,077
Human Resources Specialists	9,425	5%	1%	1.6%	30,178	3,887
Office Clerks, General	8,880	7%	0%	1.5%	50,646	5,892
Firefighters	7,158	3%	7%	1.2%	7,526	981
Accountants and Auditors	6,960	0%	3%	1.2%	48,442	5,146
Buyers and Purchasing Agents	6,732	1%	(2%)	1.1%	15,852	1,716
Legal Support Workers, All Other	6,433	(17%)	1%	1.1%	8,530	864
Engineers, All Other	6,372	17%	2%	1.1%	9,544	1,446
Postal Service Mail Carriers	6,271	(10%)	(5%)	1.0%	6,367	965
Detectives and Criminal Investigators	5,761	(1%)	3%	1.0%	5,767	964
Healthcare Diagnosing or Treating Practitioners, All Other	5,757	10%	3%	1.0%	6,971	1,235

Source: Lightcast

Occupational Supply & Demand

Table 86 provides insight into the supply and demand dynamics for various occupations within the Government industry cluster in the Washington-Arlington-Alexandria MSA. The table highlights occupations where there is a significant gap between the estimated active supply (the number of individuals currently employed or available in the workforce) and the estimated active demand (the number of positions currently needed by employers). Registered Nurses face the largest gap with an estimated supply of 1,079 compared to demand for 11,144 positions, indicating a substantial deficit of 10,065 professionals. Management Analysts, a top occupation in the cluster expected to see 9% growth by 2028, is already facing an estimated shortage of 2,332 professionals. Understanding these supply-demand gaps is crucial for aligning education programming, training initiatives, and recruitment strategies to address the most critical labor market imbalances within key industry clusters.

Table 86 - Largest Supply-Demand Gaps, Government Industry Cluster, Washington DC MSA

Occupation	Active Supply Estimate	Active Demand Estimate	Supply / Demand Gap
Registered Nurses	1,079	11,144	(10,065)
Computer Occupations, All Other	1,501	10,325	(8,824)
Managers, All Other	3,638	7,674	(4,036)
Management Analysts	2,485	4,816	(2,332)
Accountants and Auditors	1,604	2,648	(1,044)
Detectives and Criminal Investigators	157	1,085	(929)
Engineers, All Other	443	1,316	(873)
Buyers and Purchasing Agents	573	1,437	(864)
Human Resources Specialists	1,311	1,993	(682)
Military-only occupations	125	364	(239)
Compliance Officers	418	641	(223)
Lawyers	1,469	1,584	(115)

Source: Lightcast

Skills

Understanding the top skills requested by employers in key industry clusters is important for identifying skills gaps, aligning training and educational programs to meet industry needs, promoting career pathways, and supporting collaborative industry partnership initiatives.

Table 87 shows the five most requested skills for top Government occupations.

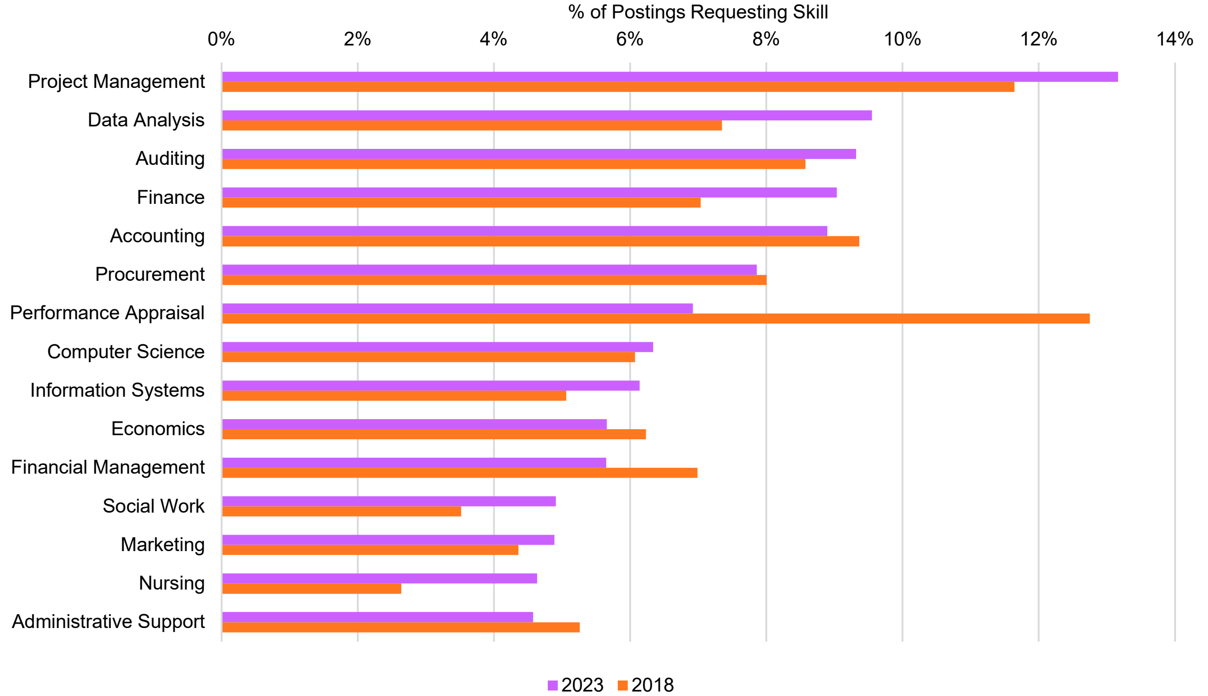
Table 87 - Top Requested Skills for Most In-Demand Occupations, Government Cluster, Washington DC MSA

Top Cluster Occupation	Top Requested Skills
Business Operations Specialist	• Project Management • Green Building • Environmental Science • Risk Management • Business Continuity
Military	• Interrogations • Law Enforcement Operations • Contraband Detection & Control • Law Enforcement • International Laws
Manager, All Operations	• Project Management • Procurement • Finance • Data Analysis • Auditing

Source: Lightcast

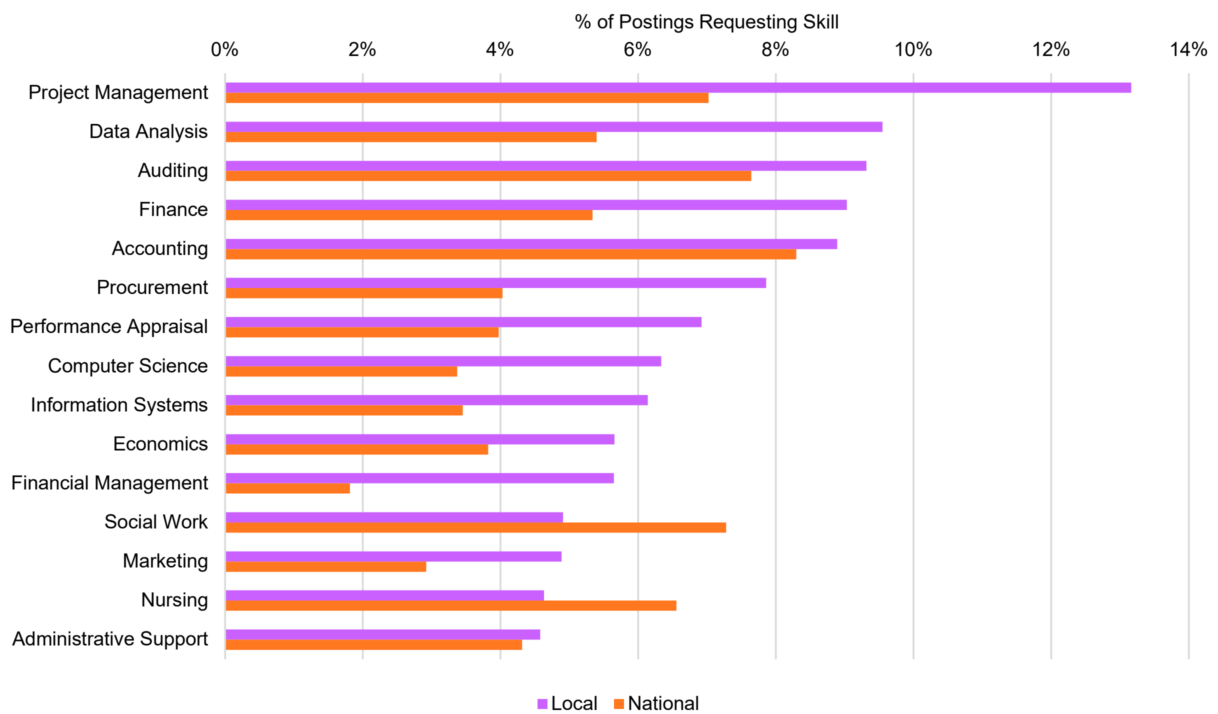
Figure 102 shows the change in employer demand for top Government skills, measured by comparing the percentage of local job postings in the industry cluster that requested that skill in 2018 and 2023. Key skills that are growing in demand include Project Management, Data Analysis, and Finance. Demand declined for Performance Appraisal skills, from 13% in 2018, to 7% in 2023.

Figure 102 - Skill Demand Change of Top Cluster Skills, Washington DC MSA



Source: Lightcast

Figure 103 - Regional vs. National Skill Demand, Government Cluster



Source: Lightcast

Industry Employer Feedback

Roundtable discussions were held June 24-25, 2024 with Employ Prince George's industry partners in order to solicit employer feedback on: (1) demand projections; (2) their top workforce challenges; (3) current and future skills demand; (4) the impacts of technology/automation; and (5) their perceptions of local workforce capacity, workforce partners/programs, and higher education/training alignment with industry needs.

Overall, Government employers reported a surplus of quality candidates for professional and administrative roles, and high retention rates for those roles. Hiring and retention is more challenging for entry-level and seasonal roles and there was consensus around a shortage of "soft" skills, namely problem solving, attention to detail, and strategic thinking. Several employers noted that candidates seem to apply for jobs arbitrarily and are unable to articulate how their interests or experience align to job qualifications.

Lightcast