

Regional Comparison Report

Lightcast Q4 2025 Data Set

February 2026



1801 Rockville Pike
Rockville, Maryland 20850

Parameters

Regions:

Code	Description	Code	Description
24031	Montgomery County, MD	51059	Fairfax County, VA
24033	Prince George's County, MD	51013	Arlington County, VA
24021	Frederick County, MD	51107	Loudoun County, VA
11	District of Columbia	51153	Prince William County, VA

Industries:

Code	Description	Code	Description
71	Arts, Entertainment, and Recreation	62	Health Care and Social Assistance
72	Accommodation and Food Services	54	Professional, Scientific, and Technical Services
44	Retail Trade	23	Construction
541715	Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)		

Timeframe: 2025 - 2026

Datarun: 2025.4 – QCEW Employees, Non-QCEW Employees, Self-Employed, and Extended Proprietors

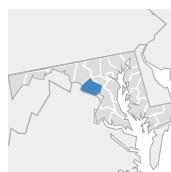
Columns Sorted By:

Regional COL Index

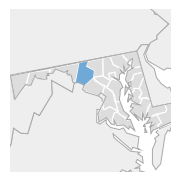
District of
Columbia



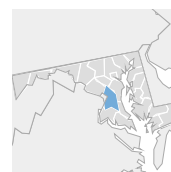
Montgomery
County, MD



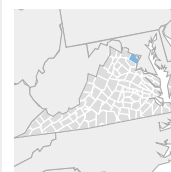
Frederick
County, MD



Prince George's
County, MD



Fairfax County,
VA



Regional Metrics

COL Index	158.6	141.8	126.5	125.3	121.2
Labor Force (Sep 2025)	413,135	565,901	156,292	508,674	642,212
Median Household Income (2023)	\$106,287	\$128,733	\$120,458	\$100,708	\$150,113
Violent Crimes per 1,000 people	10.03	1.91	1.86	4.07	1.02

Industry Metrics

Arts, Entertainment, and Recreation

Job Change %	+2%	+0%	+3%	+1%	+1%
Jobs (2025)	18,115	18,480	3,731	11,289	19,147
Jobs (2026)	18,471	18,557	3,837	11,409	19,327

Accommodation and Food Services

Job Change %	+3%	+1%	+1%	+1%	+1%
Jobs (2025)	73,328	38,747	10,896	36,380	50,257
Jobs (2026)	75,419	38,960	10,993	36,889	50,674

Retail Trade

Job Change %	+1%	+0%	+2%	+1%	0%
Jobs (2025)	25,532	53,894	20,888	51,029	63,057
Jobs (2026)	25,720	53,972	21,319	51,328	62,825

Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)

Job Change %	+0%	+3%	-12%	-1%	+2%
Jobs (2025)	5,671	5,789	318	1,433	10,216
Jobs (2026)	5,680	5,939	281	1,425	10,383

Health Care and Social Assistance

Job Change %	+1%	+2%	+1%	+1%	+2%
Jobs (2025)	79,913	91,444	16,438	47,728	87,837
Jobs (2026)	80,905	92,924	16,676	48,407	89,980

Columns Sorted By:

Regional COL Index

Professional, Scientific, and Technical Services

Job Change %

+1%

+1%

+2%

+1%

+0%

Jobs (2025)

153,598

109,884

17,217

39,869

200,882

Jobs (2026)

155,344

110,585

17,620

40,287

201,289

Construction

Job Change %

+0%

0%

+1%

+1%

+0%

Jobs (2025)

18,115

36,863

15,670

43,977

39,422

Jobs (2026)

18,180

36,790

15,774

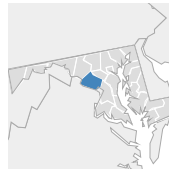
44,302

39,423

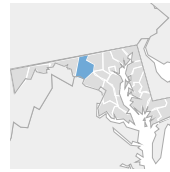
District of
Columbia



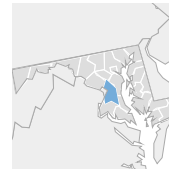
Montgomery
County, MD



Frederick
County, MD



Prince George's
County, MD



Fairfax County,
VA



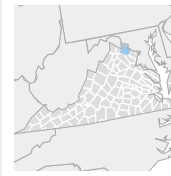
Columns Sorted By:

Regional COL Index

Arlington
County, VA



Loudoun
County, VA



Prince William
County, VA



Regional Metrics

COL Index	139.7	113.0	106.0
Labor Force (Sep 2025)	153,088	250,323	265,889
Median Household Income (2023)	\$140,160	\$178,707	\$128,873
Violent Crimes per 1,000 people	3.09	0.96	2.54

Industry Metrics

Arts, Entertainment, and Recreation

Job Change %	+2%	+2%	+2%
Jobs (2025)	5,492	7,458	6,611
Jobs (2026)	5,586	7,601	6,728

Accommodation and Food Services

Job Change %	+1%	+2%	+1%
Jobs (2025)	16,310	20,916	16,241
Jobs (2026)	16,441	21,405	16,390

Retail Trade

Job Change %	-1%	+1%	+1%
Jobs (2025)	9,286	25,304	30,286
Jobs (2026)	9,194	25,579	30,503

Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)

Job Change %	+2%	+3%	-2%
Jobs (2025)	2,923	1,174	568
Jobs (2026)	2,989	1,205	558

Health Care and Social Assistance

Job Change %	+1%	+4%	+3%
Jobs (2025)	13,285	24,160	23,803
Jobs (2026)	13,425	25,037	24,564

Professional, Scientific, and Technical Services

Job Change %	+1%	+3%	+2%
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Columns Sorted By:

Regional COL Index

Jobs (2025)

Jobs (2026)

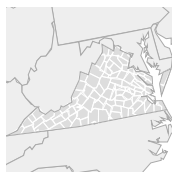
Construction

Job Change %

Jobs (2025)

Jobs (2026)

Arlington
County, VA



59,433

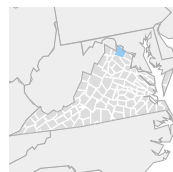
59,989

+1%

4,343

4,403

Loudoun
County, VA



41,766

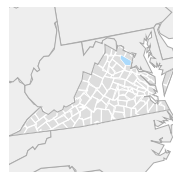
42,940

+2%

26,472

27,024

Prince William
County, VA



21,889

22,344

+2%

26,092

26,536

Appendix A - Data Sources and Calculations

Cost of Living Data

Lightcast's cost of living data is based on the Cost of Living Index published by the Council for Community and Economic Research (C2ER).

Industry Data

Emsi industry data have various sources depending on the class of worker. (1) For QCEW Employees, Emsi primarily uses the QCEW (Quarterly Census of Employment and Wages), with supplemental estimates from County Business Patterns. (2) Non-QCEW employees data are based on a number of sources including QCEW, Current Employment Statistics, County Business Patterns, BEA State and Local Personal Income reports, the National Industry-Occupation Employment Matrix (NIOEM), the American Community Survey, and Railroad Retirement Board statistics. (3) Self-Employed and Extended Proprietor classes of worker data are primarily based on the American Community Survey, Nonemployer Statistics, and BEA State and Local Personal Income Reports. Projections for QCEW and Non-QCEW Employees are informed by NIOEM and long-term industry projections published by individual states.

Location Quotient

Location quotient (LQ) is a way of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the nation. It can reveal what makes a particular region unique in comparison to the national average.

Shift Share

Shift share is a standard regional analysis method that attempts to determine how much of regional job growth can be attributed to national trends and how much is due to unique regional factors.

State Data Sources

This report uses state data from the following agencies: District of Columbia Department of Employment Services; Maryland Department of Labor; Virginia Employment Commission