

## COOPERATIVE FORECASTING GROUP

April 24, 2024  
10:00 A.M. to 12:00 P.M.

### MINUTES

Mr. Steve Cohoon, Queen Anne’s County, called the meeting to order at 10:03 A.M.

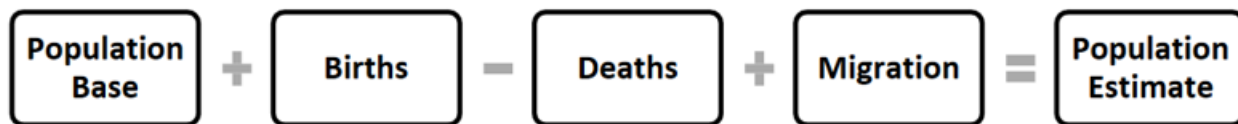
#### 1. APPROVAL OF MINUTES

Mr. Cohoon asked for approval of the minutes from the February 28, 2024 meeting of the CFG. Ms. Kathleen Comber, Carroll County, moved to approve the minutes with Mr. Alex Rawls, Harford County, seconding the motion. The minutes were unanimously approved.

#### 2. POPULATION ESTIMATES PROGRAM DATA – VINTAGE 2023

Mr. Shawn Kimberly, Baltimore Metropolitan Council, provided some background information on the Census Bureau’s Population Estimates Program (PEP), describing the different types of estimates produced and the levels of Census geography for which they are available. He also noted that the estimates have a wide-range of applications including federal funding allocations, to set controls for surveys, as denominators for vital rates and per capita time series, and to monitor demographic change over time.

The focus of this presentation was the vintage 2023 PEP estimates for county level population and demographic components of population change, released on March 14, 2024. The estimates are produced through analysis of the components of population change – births, deaths, and migration:



Source: U.S. Census Bureau

Before addressing the components of population change, Mr. Kimberly provided some context for the population growth of the region, relative to the state and nation. Since the 2020 decennial census (April 1, 2020), the population of the United States has grown by 1.04%, while Maryland has had slightly positive growth at 0.05%, and the Baltimore region experienced a modest population decline of -0.36%. The region’s negative growth over the time period was driven by population decline in Baltimore City and Baltimore County. All other jurisdictions in the region showed positive growth, with Anne Arundel County leading the way (+6,300

persons), followed by Carroll County, Harford County, and Howard County – each adding about 3,700 persons over the time-period. Queen Anne’s County had the greatest percentage population increase, with 5.3% growth.

Mr. Kimberly also shared a series of charts highlighting the population change by component for each county in Maryland from April 1, 2020 (date of the 2020 decennial census) through July 1, 2023 (date of the vintage 2023 population estimates). A few of the key findings from these charts include the following:

- Six of the Baltimore region’s jurisdictions are among the state’s top nine largest counties in population;
- Frederick County experienced the largest growth in the state over the time-period – adding 22,000 persons (8.0% growth);
- Four of the five largest jurisdictions in the state experienced population decline since the 2020 Census (Baltimore City and Baltimore, Montgomery, and Prince George’s counties);
- Five of the top seven jurisdictions in numeric population growth over the time-period are from the Baltimore region (Anne Arundel, Carroll, Harford, Howard, and Queen Anne’s counties);
- Natural Change was negative for 13 jurisdictions in the state - including Baltimore County, Carroll County, and Baltimore City in the Baltimore region;
- Montgomery and Prince George’s counties had the highest levels of international migration, and together accounted for 62% of the state’s total;
  - o Baltimore region jurisdictions accounted for 28%;
- The six largest jurisdictions in the state experienced significant declines in population via net domestic migration over the time-period while several of the smaller suburban jurisdictions demonstrated gains.

Next, the presentation covered an analysis of year-over-year population growth by component of change from July 1, 2010 through July 1, 2023, for the Baltimore region and each of the component jurisdictions. The purpose for including the historical data was to provide some trend information to help contextualize changes since 2020 that may have been influenced by the pandemic. A series of three charts revealing information on annual population growth by component of change were provided for the region and each jurisdiction.

Finally, Mr. Kimberly shared a slide comparing the county level vintage 2023 population estimates and the interpolated Round 10 2023 forecast population. The comparison was intended to assist CFG membership in their evaluation of need for (and scale of) revisions to their own jurisdiction level forecasts. At the regional level, the interpolated Round 10 2023 population is about 65,000 persons (or 2.3%) higher than the Census Bureau’s vintage 2023 population estimate.

***[PowerPoint: Vintage 2023 Population Estimates – Components of Change]***

### **3. MWCOG ROUND 10 DATA SUMMARY**

Mr. Greg Goodwin, Metropolitan Washington Council of Governments (MWCog), provided a summary of that agency's most recently adopted set of Cooperative Forecasts, Round 10.0. Mr. Goodwin provided some background information on the forecasting process of their Cooperative Forecasting and Data Subcommittee. At MWCog, jurisdiction level and small area (Transportation Analysis Zone (TAZ)) forecasts are developed by each of the participating local governments in their region. These locally developed forecasts are constrained by a "benchmark" Regional Econometric Model Forecast. The econometric model's 30-year projections of population, housing, and jobs are largely based upon third-party forecast data (purchased from S&P Global). The forecasts of the individual local jurisdictions are compiled to arrive at preliminary regional totals – which are then compared with the benchmark regional forecasts. The dataset then goes through a reconciliation process where local forecasts may (or may not) need to be adjusted to align with the benchmark data.

Mr. Goodwin showed the output of the region's Round 10.0 econometric model including 30-year growth in employment by industry and population by age over time. He also explained that prior to the development of Round 10.0, MWCog obtained the services of a consultant (ICF) to assist in the estimation of potential long-term impacts of the pandemic upon 30-year growth forecasts, and to help better understand the possible effects on the utilization of commercial space, housing demand, and average household size. This information was made available to local jurisdictions to assist them as they created their own local level forecasts.

Mr. Goodwin then shared the Round 10.0 estimates and forecasts for population, households, and employment – from 2020 through 2050.

- Regional population is expected to grow by nearly 1.5 million persons;
- Regional households are anticipated to expand by approximately 700,000;
- Regional employment is forecast to grow by about 1.0 million jobs.

Also shared was a series of three charts highlighting Round 10.0 population, household, and employment growth at the jurisdictional level.

***[PowerPoint: MWCog Round 10.0 Summary]***

#### **4. POST-PANDEMIC TRENDS CONSULTANT TASK - UPDATE**

Mr. Kimberly provided a brief update on the status of the consultant project initiated by the CFG, "Post-pandemic Trends in Employment, Commercial Real Estate, Housing Location Choice, and Travel Demand." He reminded the group that the project is divided into two main components: a worker and employer survey piece; and a section on future trends, focusing on changes caused by adjustments to work arrangements resulting from the pandemic (including work from home adoption rates, employment by industry trends, changes in commercial real estate and downtowns, as well as home location choice).

He noted that the data collection portion of the survey phase of the project was complete. The employer survey yielded 79 completes, falling short of the target of 100 completes set by the consultant. The employee survey generated 1,621 completes, about 120 in excess of the

consultant's target. Next steps for the survey phase include data cleaning and processing, the development of cross-tabulations, and analyses of survey results with a written report.

Mr. Kimberly then shared a Gantt chart illustrating the project schedule. Phase 1 is expected to be complete in June (about one month later than originally anticipated). The Phase 2 schedule remains unchanged. Some initial effort for Phase 2 has already begun, including data acquisition and work on the literature review.

***[PowerPoint: Update – Post-pandemic Trends Consultant Task]***

**5. CFG MEETING FORMAT DISCUSSION**

The group discussed meeting format preferences (in-person and virtual formats). It was determined the group would hold two in-person meetings in 2024 (in June and December). A hybrid option will be maintained for those in need of accommodations.

**6. NEW BUSINESS**

There was no New Business introduced.

The meeting adjourned at 11:56 A.M.

**ATTENDANCE**

***Members***

Steve Cohoon, Queen Anne's County Department of Public Works  
Kathleen Comber, Carroll County Department of Planning  
Rick Fisher, Anne Arundel County Office of Planning and Zoning  
Alex Rawls, Harford County Department of Planning and Zoning  
Jamie Williams, Baltimore City Department of Planning

***Staff and Guests***

Greg Goodwin, Metropolitan Washington Council of Governments  
Shawn Kimberly, BMC  
Todd Lang, BMC  
Crystal McDermott, BMC  
Md. Mohklesur Rahman, BMC  
Brian Ryder, BMC  
Larysa Salamacha, Baltimore Development Corporation