





# Discussion: Timing of Next Set of Cooperative Forecasts

December 20, 2023



# Context to Support Discussion

# Comprehensive Plan Adoption Dates

 = Current Plan Adoption Date  
 = Projected Adoption Year (Next Plan)

Jurisdiction	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Anne Arundel													Plan 2040					
Annapolis	Annapolis Comp Plan														Annapolis Ahead			
Baltimore City																Our Baltimore		
Baltimore County		Master Plan 2020													Master Plan 2030			
Carroll							2014 Master Plan											
Harford									Harford Next									
Howard				Plan Howard 2030											HoCo By Design			
Queen Anne's		2010 Comp Plan												Plan QAC 2022				

Source: Maryland Department of Planning (<https://planning.maryland.gov/Pages/OurWork/compplans/viewplans.aspx>); local jurisdictions.

# 2022 Population Comparison: CFG R10 and Census PEP

Jurisdiction	2022	2022	Difference (R10-PEP)	
	Census PEP <sup>1</sup>	R10 - CFG	Num	Pct
Anne Arundel	597,716	604,292	6,576	1.1%
Baltimore City	569,931	589,235	19,304	3.3%
Baltimore County	846,161	859,959	13,798	1.6%
Carroll	175,305	174,294	-1,011	-0.6%
Harford	263,867	264,578	711	0.3%
Howard	335,411	339,269	3,858	1.1%
Queen Anne's	51,711	51,009	-702	-1.4%
<b>Baltimore Region</b>	<b>2,840,102</b>	<b>2,882,636</b>	<b>42,534</b>	<b>1.5%</b>

<sup>1</sup> Anne Arundel County estimate was increased by 4,430 to account for the Naval Academy

GQ population (which was absent from 2020 decennial census data).

Source: Cooperative Forecasting Group; Baltimore Metropolitan Council; U.S. Census Bureau.

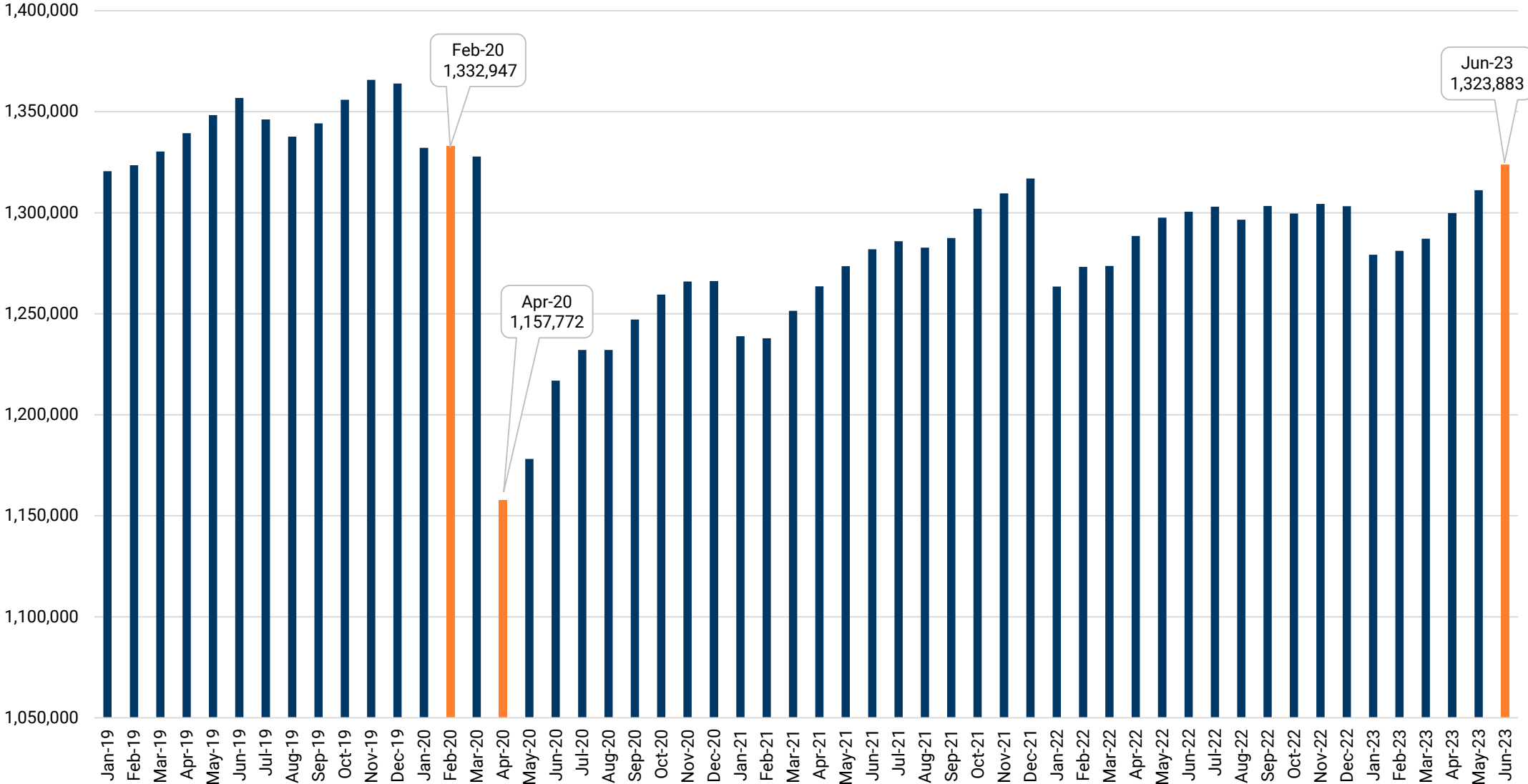
# 2022 Employment Comparison: CFG R10 and 2022 Estimate

Jurisdiction	2022	2022	Difference (R10-Emp Est)	
	Emp Est	CFG (R10)	Num	Pct
Anne Arundel	331,878	354,529	22,650	6.8%
Baltimore City	388,132	370,005	-18,127	-4.7%
Baltimore County	417,787	403,720	-14,067	-3.4%
Carroll	64,724	63,414	-1,310	-2.0%
Harford	106,073	104,691	-1,381	-1.3%
Howard	191,705	188,950	-2,754	-1.4%
Queen Anne's	17,685	16,647	-1,038	-5.9%
<b>Baltimore Region</b>	<b>1,517,984</b>	<b>1,501,956</b>	<b>-16,028</b>	<b>-1.1%</b>

Source: Bureau of Economic Analysis (CAEMP25N); Bureau of Labor Statistics (QCEW);

Local jurisdictions; Cooperative Forecasting Group; Baltimore Metropolitan Council.

# QCEW Employment – Baltimore MSA



Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages.



# Employment by Industry Sector, Baltimore Region

Sector Industry Name	Feb 2020	Apr 2020	Mar 2023	Feb 2020 to Apr 2020		Feb 2020 to Mar 2023	
				Num	Apr20/Feb20	Num	Mar23/Feb20
11-21 Ag/Forestry/Fishing/Mining	2,023	2,306	2,709	283	114.0%	686	133.9%
22 Utilities	5,833	5,634	5,836	-199	96.6%	3	100.1%
23 Construction	77,917	72,698	76,971	-5,219	93.3%	-946	98.8%
31-33 Manufacturing	59,246	55,472	60,797	-3,774	93.6%	1,551	102.6%
42 Wholesale Trade	47,910	43,245	44,073	-4,665	90.3%	-3,837	92.0%
44-45 Retail Trade	126,605	101,057	125,034	-25,548	79.8%	-1,571	98.8%
48-49 Transportation and Warehousing	65,987	63,299	75,293	-2,688	95.9%	9,306	114.1%
51 Information	19,037	17,610	15,470	-1,427	92.5%	-3,567	81.3%
52 Finance and Insurance	50,419	48,884	42,174	-1,535	97.0%	-8,245	83.6%
53 Real Estate and Rental and Leasing	21,285	19,552	20,194	-1,733	91.9%	-1,091	94.9%
54 Professional, Scientific, and Technical Svcs	119,751	114,597	120,116	-5,154	95.7%	365	100.3%
55 Management of Companies and Enterprises	14,960	15,658	14,808	698	104.7%	-152	99.0%
56 Admin & Support, Waste & Remediation Svcs	84,632	74,017	81,977	-10,615	87.5%	-2,655	96.9%
61 Educational Services	135,909	129,906	124,667	-6,003	95.6%	-11,242	91.7%
62 Health Care and Social Assistance	220,566	194,222	211,021	-26,344	88.1%	-9,545	95.7%
71 Arts, Entertainment, and Recreation	21,879	9,765	19,033	-12,114	44.6%	-2,846	87.0%
72 Accommodation and Food Services	109,805	53,187	99,687	-56,618	48.4%	-10,118	90.8%
81 Other Services (except Public Admin)	42,238	27,580	39,834	-14,658	65.3%	-2,404	94.3%
92 Public Administration	111,755	112,453	114,320	698	100.6%	2,565	102.3%
<b>Total</b>	<b>1,337,757</b>	<b>1,161,142</b>	<b>1,294,014</b>	<b>-176,615</b>	<b>86.8%</b>	<b>-43,743</b>	<b>96.7%</b>

Source: Maryland Department of Labor; Baltimore Metropolitan Council.



# Discussion: Next Set of Cooperative Forecasts



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## Potential Timing of LRTP, Cooperative Forecasts, and Related Projects

LRTP Year	2024	2025	2026	2027
2026 LRTP	MEF / UPWP Task / Forecast Dev	Forecast Adoption	LRTP Approval	
2027 LRTP	MEF / UPWP Task / Forecast Dev	Forecast Adoption / Forecast Dev?	Forecast Adoption?	LRTP Approval

= Possible forecast adoption year.

# Discussion: Next Set of Cooperative Forecasts

- **What does CFG membership think about:**
  - The need for an update to the cooperative forecasts
  - The timing of an update to the forecasts
  - Master Establishment File update in 2024
    - Inclusion of MEF update requires participation of all CFG membership

# Cooperative Forecasts - Draft Schedule

## DRAFT: Cooperative Forecasts - Data Availability and Schedule

Tasks	2023					2024							2025							
	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
<b>MASTER ESTABLISHMENT FILE UPDATE</b>												F								
QCEW 2Q (2023) Geocode / Clean												O								
<b>CURRENT (2023) POPULATION AND EMPLOYMENT ESTIMATES</b>												R								
County Level Population Estimates Program Data (v2023)												E								
County Level Employment Estimates - CFG Methodology (2023)												C								
<b>FORECAST DEVELOPMENT</b>												A								
Jurisdictional Level Totals												S								
Population												T								
Households												S								
Employment																				
TAZ Level Data												D								
Population												U								
GQ Population												E								
Households																				
Employment												T								
<b>FORECAST REVIEW AND MODEL INPUT DEVELOPMENT</b>												O								
BMC Staff Review (TAZ level)																				
Jurisdiction Submits Final Adjustments (as needed)												B								
BMC Staff Creates Model Inputs												M								
Methodology Statements Due to BMC												C								
Cooperative Forecasts Endorsed by BRTB																				

Note: Draft schedule as of December 19, 2023.

Source data becomes available  
BMC staff task

CFG membership task  
BMC staff and CFG membership task

# For More Information

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**Shawn Kimberly, AICP** | Principal Planner

410-732-0500 x1026 | [skimberly@baltometro.org](mailto:skimberly@baltometro.org) | [www.baltometro.org](http://www.baltometro.org)

