

COOPERATIVE FORECASTING GROUP

February 26, 2025
10:00 A.M. to 11:54 A.M.

MINUTES

Mr. Steve Cohoon, Queen Anne's County, called the meeting to order at 10:02 A.M.

1. APPROVAL OF MINUTES

Mr. Cohoon asked for approval of the minutes from the December 18, 2024 meeting of the CFG. Ms. Jennifer Meacham, Baltimore County, moved to approve the minutes with Ms. Kathleen Comber, Carroll County, seconding the motion. The minutes were unanimously approved.

2. PRESENTATION ON UPDATED CENSUS DATA

Mr. Cohoon introduced Mr. Matt Hancock, who opened the meeting with a detailed presentation on household changes in the Greater Baltimore region, using data from the December 2024 release of the American Community Survey (ACS). He began by highlighting that all areas in the region experienced total household growth, with Anne Arundel County recording the largest numerical gain. This growth was driven by a combination of natural increase (births - deaths) and migration patterns, both domestic and international. Mr. Hancock noted that most regions saw greater inter-county movement compared to intra-county movement, with the exception of Baltimore City, Baltimore County, and Harford County, where intra-county movement remained dominant. This trend suggests that residents in these areas are more likely to relocate within their own counties rather than moving to neighboring jurisdictions. He also pointed out that the data indicated a trend toward population stability, with a higher percentage of residents staying in their current residences compared to previous years. This shift could be attributed to factors such as housing availability, employment stability, and the lingering effects of the pandemic.

Mr. Hancock provided a county-by-county breakdown of household growth and migration trends, offering insights into the unique dynamics of each jurisdiction. Anne Arundel County experienced the largest numerical gain in households, with about 16,000 new households. While the county saw a steady flow of international migration, domestic migration within the county declined, suggesting a more stable population with fewer residents relocating. The presentation continued to show that Baltimore City added roughly 12,000 households, representing the second-lowest rate of increase in the region. However, the City maintained a

stable population, with 86% of residents staying in their current residences. Baltimore City also saw consistent international migration, which helped offset domestic migration losses.

Mr. Hancock continued to a discussion of Baltimore County, which added the most households numerically, but at a slower rate compared to overall regional growth. The county's population of approximately 850,000 includes about 330,000 households, with 90% of residents staying in the same residence. This indicates a trend toward population stability, with fewer households relocating. Next, the group was provided information on Carroll County. With the smallest percentage increase in households at 5%, Carroll County boasts the region's highest housing stability rate, with 92.6% of residents reporting they remained in the same residence as the previous year. Carroll County also saw a decline in domestic migration, suggesting a highly stable population.

Mr. Hancock then moved on to Harford County, which saw a 7.5% increase in total households, with about 90% of residents staying in the same residence. This trend shows the county's population is becoming more stationary, with fewer residents moving from different counties or states. Harford County also experienced a decline in domestic migration but maintained consistent international migration. Following a similar trend, Howard County added approximately 7,100 households, with a growth rate of 6.3%. The county saw stable movement within the state and from abroad, but domestic migration declined and Howard County's population is also becoming more stable, with fewer residents relocating. Lastly, Mr. Hancock discussed Queen Anne's County, which experienced an 8.2% increase in households, adding about 1,500 households. The county has a highly stable population, with 90% of residents remaining in the same residence with domestic and international migration remaining relatively stable, contributing to steady growth.

Mr. Hancock emphasized that the data indicated a trend toward population stability across the region, with a higher percentage of residents staying in their current residences compared to previous years. This shift could be attributed to factors such as housing availability, employment stability, and the lingering effects of the pandemic. Mr. Hancock concluded his presentation by discussing the implications of these trends for regional planning. He noted that the decline in domestic migration across most counties suggests a more self-contained population with less movement, which could have long-term effects on housing demand, transportation patterns, and economic development. Mr. Hancock intimated that the presentation was intended to set the stage for a broader discussion on how these trends might influence future forecasting and policy decisions.

[PowerPoint: U.S. Census Bureau Population Estimates: ACS Updated Release – Household Level Change]

3. PRESENTATION ON MWCOG FORECASTING METHODOLOGIES

Mr. Greg Goodwin provided an overview of the Cooperative Forecasting Process for the DC region, which he has been involved in for approximately 25 years. He highlighted Round 10, the official forecast, adopted by the MWCOG Board of Directors in June 2023. Mr. Goodwin explained that the model covers a region slightly larger than the COG region, including three

jurisdictions within the BMC region. He discussed the process, performance, and approval of the Round 10 forecast, noting that they are currently working on a 10.1 forecast. Mr. Goodwin provided historical context for the forecasting process, which has been in place since 1975, and discussed the data products provided to local jurisdictions. He also explained the use of an alternative econometric model forecast, which serves as a benchmark for reconciling local government projections. Mr. Goodwin emphasized the importance of ensuring that local forecasts align with the econometric model, typically within a 3% to 5% range. He concluded by discussing the challenges of forecasting in the post-pandemic period, including uncertainties in the employment market and the need to account for changes in commercial space, housing, and household size.

Mr. Goodwin discussed various economic forecasts and projections for the region. He noted that while the model did not anticipate significant growth in the federal government sector, changes under the current administration could impact this. He highlighted that the age 65+ population is expected to grow from 757,000 in 2020 to over 1.2 million by 2050, reflecting the aging population trend. Mr. Goodwin mentioned that the employment forecast for 2020 was slightly higher than the actual numbers due to the pandemic, but household forecasts were stronger, with only a 20,000-person difference compared to the actual 2020 numbers. He also discussed potential changes to commercial space, housing, and household size due to the pandemic. The final Round 10 data forecasts 3.2 million jobs in 2020, increasing to 4.2 million by 2050, a population increase from 5.7 million to 7.2 million, and an increase in households from 2.1 million to 2.8 million. Mr. Goodwin emphasized that the significant changes in the forecast compared to Round 9.2 were mostly related to employment, with jurisdictions reassessing job growth projections in light of the pandemic's impact.

Mr. Goodwin discussed the projected growth in jobs and population in the region, with Fairfax County being the most populous and having the most households. The region is expected to add about a million more jobs between 2020 and 2050, with three out of every four new jobs expected to be in the service industry. The population is projected to grow by 1.5 million during the same period, and the average household size is expected to decline. Mr. Goodwin mentioned that some jurisdictions are making revisions to their forecasts for Round 11, but regional totals are not expected to change significantly. Mr. Goodwin highlighted that the region's employment growth is expected to be driven by business services, which are projected to add 252,000 jobs by 2050. He also noted that the region's population growth is expected to be steady across all age cohorts, with the fastest growth occurring in the 65+ age group.

Mr. Goodwin discussed the ongoing process of forecasting and revisions for the 10.1 round, which is not a significant change from the previous round. He expressed hope for the district's participation in the next round but acknowledged staff capacity constraints. Mr. Goodwin also mentioned the potential impact of federal job reductions on the economy and population, emphasizing the need for additional analysis to identify this impact. He clarified the distinction between federal workers and jobs, noting that federal workers would apply for unemployment through the district, not the state. The conversation concluded with Mr. Cohoon thanking Mr. Goodwin for his presentation. Mr. Goodwin also discussed the potential multiplier effect of federal job reductions, noting that each job loss could have broader economic implications, including impacts on housing, spending, and other sectors. He closed by emphasizing the need

for further analysis to understand the full impact of these changes on the region's economy and population.

[PowerPoint: COG Regional Growth Projections – Process and Final Forecasts]

4. UPDATE ON POST-PANDEMIC TRENDS PROJECT

Mr. Hancock presented the findings of a survey on post-pandemic trends among employees and employers in the region, which was conducted by AECOM with the assistance of WBA. The survey, which took place from mid-February to mid-April 2024, included responses from 1,630 employees and 77 employers, providing a robust dataset for analysis. The results were broken down by jurisdiction, offering insights into the evolving work environment and employee preferences in the wake of the pandemic. The survey revealed that employees overwhelmingly desire more flexibility in their work schedules, remote work options, pay transparency, and overall recognition and rewards. However, there was a notable disconnect between employer and employee perceptions of work arrangements. While employers did not anticipate significant changes to current work arrangements, employees expressed a greater expectation for a return to in-person work or increased flexibility in their schedules. This misalignment highlights a potential gap in understanding between employers and their workforce regarding post-pandemic work preferences.

Employees also emphasized the importance of access to resources and accommodations that promote accessibility and flexibility. Many respondents indicated that they value the ability to control their work schedules and locations, with a significant portion considering job changes to achieve this flexibility. The survey results showed that employees are seeking greater work-life balance, with many citing the ability to spend more time with family and friends as a key reason for preferring remote or hybrid work arrangements. The survey results were segmented into different employee groups based on similarities and differences, providing a nuanced understanding of workforce dynamics. Preliminary county-level results were also presented, revealing variations in preferences for in-person versus remote work across different jurisdictions.

The presentation then provided a breakdown of preliminary results by jurisdiction, beginning with Anne Arundel. Employees in Anne Arundel County reported working an average of 31 to 40 hours per week, with about 50% in office roles. The county showed high job satisfaction and a low likelihood of changing jobs. Companies in Anne Arundel were either very small (fewer than 20 employees) or very large (5,000+ employees), reflecting a diverse employment landscape. Employees in this county were more likely to value remote work benefits, such as avoiding congestion and achieving higher job satisfaction.

Employees in Baltimore City were more likely to prefer entirely in-person work compared to other jurisdictions. The City's workforce reported a strong preference for maintaining in-person work arrangements, with many employees valuing the social and collaborative aspects of working in an office environment. However, there was still a significant portion of employees who desired more flexibility in their work schedules. Employees in Baltimore County were generally similar to their counterparts in other counties, with no standout trends in satisfaction

or preference. The county's workforce reported a balanced mix of in-person and remote work preferences, reflecting the diverse nature of its employment sectors.

Employees in Carroll County were least likely to have company monitoring while working from home, indicating a higher level of trust and autonomy in remote work arrangements. They were also most likely to avoid traffic congestion when working remotely, highlighting the benefits of flexible work schedules in reducing commute times and improving work-life balance. Preliminary results indicate that employees in Harford County report the least satisfaction with control over their work location, timing, and methods of participation. They were also least likely to consider changing jobs or perform household chores while working from home. This suggests that employees in Harford County may feel less empowered to manage their work schedules and locations compared to other counties.

Employees in Howard County were significantly more likely to be in hybrid work arrangements or not working from home at all. The county's workforce reported a strong preference for flexible work schedules, with many employees valuing the ability to balance work and personal responsibilities. Howard County also showed a higher proportion of employees who were satisfied with their current work arrangements. Mr. Hancock noted that due to the small sample size, the results for Queen Anne's County should be interpreted with caution. However, the county had the highest proportion of employees who reported a disability, highlighting the importance of accessibility and accommodations in the workplace. Employees in Queen Anne's County also reported a strong preference for stable work arrangements, with many valuing the ability to work from home.

The presentation concluded with key takeaways from the survey. Most employees reported being satisfied with their jobs and work schedules, but preferences for in-person versus remote work varied significantly by jurisdiction. Employers, on the other hand, did not anticipate major changes to their current work arrangements, creating a potential disconnect with employee expectations. The detailed report, spanning 150 pages, provides a wealth of data and analysis that can provide valuable insight for policymakers, employers, and regional planners as they navigate the evolving landscape of post-pandemic work in the Baltimore region.

[PowerPoint: Post-Pandemic Trends Consultant Task]

5. SUGGESTED TOPICS FOR 2025 MEETINGS

Potential topics for future meetings were discussed, including the agricultural census data, population predictions, and the impact of Governor Moore's economic development initiatives. Mr. Sundara suggested a presentation on population predictions, particularly given the deviations from BMC's projections for individual jurisdictions. The team also discussed the discontinuation of BEA jobs data at the jurisdiction level and the need for alternative data sources, such as QCW BLS data. Mr. Goodwin mentioned that COG is also seeking alternative data sources for military employment data. The team considered evaluating different sources for commuting data, including OnTheMap and ACS Commutations. Mr. Cohoon encouraged team members to suggest additional topics for future agendas.

6. OTHER BUSINESS

There was no New Business introduced. The next meeting of the CFG will be Tuesday April 22, 2025. The meeting adjourned at 11:54 A.M.

ATTENDANCE

Members

Jeff Bronow, Howard County Department of Planning and Zoning
Jennifer Meacham, Baltimore County Department of Planning
Austin Broderick, Baltimore County Department of Planning
Rick Fisher, Anne Arundel County
Steve Cohoon, Queen Anne's County Department of Public Works
Kathleen Comber, Carroll County Department of Planning
Rebecca Baird, Harford County Department of Planning and Zoning - GIS
Al Sundara, Maryland Department of Planning
Greg Goodwin, Metropolitan Washington Council of Governments
James Wilkerson, Howard County Department of Planning and Zoning

Staff and Guests

Todd Lang, BMC
Crystal McDermott, BMC
Matthew Hancock, BMC