

## **COOPERATIVE FORECASTING GROUP**

April 22, 2025  
10:02 to 11:12 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 February 26, 2025 meeting of the CFG. Mr. Cohoon moved to approve the minutes with Ms. Kathleen Comber, Carroll County, seconding the motion. The minutes were unanimously approved.

#### **2. PRESENTATION ON POPULATION AND HOUSING ESTIMATES (PEP v2024)**

Mr. Cohoon introduced Mr. Matt Hancock, BMC, who presented updated population estimates for the region, covering the period from April 2020 through July 2024. Mr. Hancock began with an overview of national demographic trends, stating that the U.S. population had grown by approximately 2.57% since the 2020 Census, including an increase of nearly one percent in the year 2024 alone. He emphasized that this national growth occurred despite ongoing fluctuations since 2020 and was driven by a mix of natural increase and net migration.

Shifting to the Baltimore region, Mr. Hancock explained that the region experienced an overall population gain of approximately 11,000 persons between 2023 and 2024. However, he noted that this growth was unevenly distributed. While the broader region saw gains, Baltimore City and Baltimore County experienced population declines between 2020 and 2024. Baltimore City, however, registered the first overall population increase since 2014, with a net increase of 754 residents in 2024.

Mr. Hancock clarified that the April 2020 base population figures had been revised and incorporated new vital statistics, including births, deaths, and migration patterns. In response to a question regarding the apparent inconsistency in the base population figures for Carroll County, Mr. Hancock confirmed that the Census Bureau had revised the 2020 base to better reflect demographic changes using updated data sources.

He proceeded to deliver a jurisdiction-by-jurisdiction analysis of regional demographic changes. Beginning with Anne Arundel County, a net gain of over 8,900 residents was recorded between 2020 and 2024, with population growth accelerating in 2023 and 2024. The trend was largely attributed to an increase in international migration and sustained natural increase, where births exceeded deaths. Baltimore County saw a modest overall decline of just over 900

persons during the same period, though Mr. Hancock highlighted a significant reversal between 2023 and 2024, during which the county gained approximately 3,700 residents. He interpreted this as a potential shift in migration dynamics, suggesting increased suburban movement in response to broader regional housing and employment patterns.

Carroll County exhibited a long-term trend of population stability, marked by alternating years of slight growth and decline. Mr. Hancock noted that natural change in the county had turned negative in 2021 and 2022 due to a higher number of deaths than births, which he attributed to the aging population. Ms. Comber asked whether this shift was largely the result of demographic aging, and Mr. Hancock confirmed that this was a primary factor contributing to the recent decline in natural increase. In Harford County, the population increased by approximately 4,200 persons from 2020 to 2024, with growth driven primarily by migration. Though the rate of increase slowed after 2021, Mr. Hancock pointed out that both natural change and net migration had remained positive in recent years.

Howard County continued to experience steady growth, adding nearly 6,800 residents over the four-year period. Mr. Hancock explained that although the county briefly experienced a downturn in net migration in 2022, the trend reversed in 2024 due to a substantial increase in international migration, which more than offset domestic outflows. Lastly, moving to Queen Anne's County, Mr. Hancock highlighted that the county had the highest percentage growth in the region. He further noted that, unusually, the number of births and deaths in 2024 were exactly equal, resulting in no natural change for that year. He confirmed, in response to a comment from Mr. Cohoon, that the growth was entirely attributable to migration.

Following the presentation, Mr. Cohoon raised the issue of mobility within the region, noting how some counties, such as Queen Anne's, seemed to benefit from domestic in-migration, possibly from neighboring jurisdictions. He asked if there was a slide showing county-to-county domestic migration within the Baltimore region. Mr. Hancock responded that while this detail was not included in the current presentation, much of the observed domestic migration, particularly in the pandemic years, did consist of movement between counties within the region. He added that domestic migration had since slowed, mirroring national patterns. Mr. Hancock referred to a recently released Census Bureau report, which confirmed that international migration was the primary driver of population growth across nearly all U.S. metro areas during the same period.

Mr. Cohoon also commented on the finding that births and deaths in Queen Anne's County were equal in 2024. He speculated that recent housing development may have attracted younger families, potentially setting the stage for future shifts in natural increase. Mr. Hancock agreed that such local dynamics often influence population trends and that demographic transitions can be closely tied to housing availability and migration flows.

***[PowerPoint: U.S. Census Bureau Population Estimates: Jurisdiction Level Components of Change – v2024]***

### **3. PRESENTATION ON QUARTERLY CENSUS OF EMPLOYMENT & WAGES (QCEW-Q3 2024)**

Following questions, Mr. Hancock then transitioned to the second presentation, providing the CFG with an update on the third-quarter release of the Quarterly Census of Employment and Wages (QCEW) for Q3 of 2024. He explained that this dataset, received in late March, offers a snapshot of salaried employment across jurisdictions and industries but cautioned that it remains subject to revision. Comparative analysis with earlier quarters was limited due to ongoing data cleaning, and more definitive insights are expected once fourth-quarter data completes the 2024 calendar year.

Each slide in the presentation summarized the top ten industries in each jurisdiction based on Q3 employment counts, and also compared these Q3 figures with the full-year 2023 QCEW totals. Additionally, Mr. Hancock included employment projections from the Round 10 cooperative forecast and juxtaposed those figures with estimates from the American Community Survey (ACS). He noted consistent discrepancies between the QCEW and ACS, with the latter often appearing to overestimate employment levels. He attributed this to methodological differences—particularly the ACS's inclusion of self-employed individuals and its reliance on survey sampling. Mr. Hancock emphasized that the QCEW and PEP (Population Estimates Program) data are likely to offer a more precise account of salaried employment.

Beginning with Baltimore City, Mr. Hancock reported that the top employers were concentrated in health care and education, with general medical and surgical hospital services ranked first. Total Q3 employment stood at 327,000, slightly below the 2023 annual figure. The ACS estimates, in comparison, significantly exceeded the QCEW totals for the City, reinforcing concerns about over counting in ACS data. In Baltimore County, elementary and secondary schools, as well as colleges and universities, led the rankings. Health care and service sectors followed, with Q3 employment reported at 339,000—again slightly below the full 2023 figure, but broadly in alignment.

Anne Arundel County showed a similar distribution, with education, restaurants, health care, and engineering services among the top sectors. Mr. Hancock noted an estimated 232,000 employed in Q3 2024, compared with 277,000 for the prior full year. He added that this trend was consistent with annual employment patterns and not indicative of sudden shifts. Carroll County's leading sectors included education, restaurants, and health care. Mr. Hancock reported that the county's 55,791 Q3 employees closely tracked the 2023 annual figure of 57,000, suggesting a stable employment base.

In Harford County, employment was led by education, followed by warehousing, service industries, and automotive and computer-related sectors. The Q3 figure of 78,000 was in line with the 94,000 reported in 2023, with Mr. Hancock noting no significant changes or anomalies in the employment trend. Howard County presented a more specialized employment profile, with top sectors including aeronautical and nautical system manufacturing, education, R&D, and computer design services. Mr. Hancock reported 176,000 employed in Q3, which exceeded the 2023 annual QCEW figure. This suggested a potential upward shift in total employment that will be confirmed once the year-end data are available. Finally, in Queen Anne's County, Mr. Hancock reported 14,591 employees in Q3, compared to 15,635 for the

previous full year. Leading sectors included education, restaurants, and legislative bodies, with service industries making up the remainder.

Mr. Hancock concluded the presentation by emphasizing that this update was intended as a high-level overview to assist members in understanding recent employment patterns and preparing for upcoming forecasting adjustments. He welcomed any questions and offered to discuss the data in more detail offline with members who wished to explore localized insights or sector-specific changes.

***[PowerPoint: QCEW Update: Q3 (2024) Employment Data for BMC Jurisdictions]***

#### **4. MEMBER DISCUSSION – NEEDS FOR FORECASTS**

Following both presentations, Mr. Hancock invited questions and discussion regarding forecasting needs, data requests, or coordination with BMC staff in regards to producing population and employment forecasts for the upcoming Long Range Transportation Plan (LRTP). Ms. Comber, asked about the employment ratio previously provided by BMC for converting between total employment (including self-employment) and salaried employment. She recalled that each county had a distinct ratio, which had been used to address the known overestimation of employment counts in ACS data due to the inclusion of self-employed workers. Mr. Hancock responded that he would review the historical files created by a former staff member and, if needed, recreate the ratios to assist with consistent baseline employment estimation across jurisdictions.

Mr. Greg Goodwin, Metropolitan Washington Council of Governments (MWCOC), asked whether BMC was planning to adjust its base year from 2020 to 2025 in light of the new extended projection horizon to 2055. Mr. Hancock responded that the 2020 base would remain in place for this round, although BMC might adopt a methodology similar to the U.S. Census Bureau's adjustment process—potentially integrating updated migration or natural increase factors to refine the base figures.

Mr. Todd Lang, BMC, confirmed that 2025 will serve as the primary development year for the next forecast cycle, with formal adoption expected by mid-2026. Mr. Hancock closed the discussion by thanking the members for their input and encouraged them to continue reaching out with specific requests or questions as the forecast update process moves forward.

#### **5. OTHER BUSINESS**

There was no New Business introduced. The next meeting of the CFG will be Wednesday, June 25, 2025. The meeting adjourned at 11:12 A.M.

#### **ATTENDANCE**

##### ***Members***

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  
Greg Goodwin, Metropolitan Washington Council of Governments  
James Wilkerson, Howard County Department of Planning and Zoning

***Staff and Guests***

Todd Lang, BMC  
Matthew Hancock, BMC  
Rahman Moklesur, BMC  
Bob Northfield, BCT Design Group  
Ann Tyler, ULI Baltimore, BCT Design Group