

Post 2010 Census Population Growth Dominated by Inner Suburban Counties

The first post 2010 Census jurisdiction population estimates released by the U.S. Census Bureau indicate that the effects of the Great Recession are still being played out in Maryland. With job and housing markets that have not yet fully recovered from the December 2007 to June 2009 recession, population gains to exurban jurisdictions on the Eastern Shore and Western Maryland, as well as to some other suburban jurisdictions in Central Maryland, continues to lag the more robust growth that was occurring earlier in the last decade. The Great Recession and its aftermath has most prominently curtailed the movement to these areas through greatly reduced domestic migration, much of which comes from inner suburban counties. As a result, since the beginning of the recession and continuing through the first year of the current decade, more of the State's population growth has been concentrated in the four inner suburban counties (Montgomery, Prince George's, Anne Arundel and Baltimore) plus Howard County, aided by international migration.

Maryland's Population Gain Keeps Pace with U.S

State-level estimates released in December 2011 showed that Maryland's population grew by just over 54,700 people between April 1, 2010 and July 1, 2011, ranked 12th among the 50 states and the District of Columbia. The State's 0.9 percent increase during this time period matched the overall national percentage change and was ranked 22nd. The U.S. Census Bureau uses a cohort component method for population estimates, incorporating births and deaths from administrative records, as well as estimates for net domestic and international migration. (For more information on the state and national estimates, see [Maryland Estimates for 2012](#).)

International Migration Fuels Growth in Montgomery and Prince George's

Population growth in Maryland over the 15-month period between April 1, 2010 and July 1, 2011 was led by Montgomery (18,017) and Prince George's (7,813) counties, the two largest counties in Maryland. (See [Table 1](#).) Growth in these two counties accounted for 47.2 percent of the net statewide change and was led by gains from net natural increase (i.e., births minus deaths), as well as international migration. These two counties combined for just under one-half (49.4%) of the statewide gain from net natural increase and 59.1 percent of the statewide growth from international migration. (See [Table 2](#).) Montgomery and Prince George's counties were also number one and two in gains from international migration throughout the 2000s. (See [Table 3A](#)).

While gains from domestic migration were not a significant part of the Montgomery County increase (+ 551 over the 15-month period), in past years the County has experienced significant net losses. For Prince George's County, on the other hand, population gains were held back by the nearly 5,300 loss through domestic migration. While this net outflow was the largest in the State, it was also smaller than in past years. (See [Table 3B](#)).

Rounding out the top five population increases in Maryland over the 15-month period are Anne Arundel (6,747) Howard (6,057) and Baltimore (4,912) counties. Besides gains through net natural increase, growth through domestic migration was key for Howard (at 2,355 the largest in the State), and

Anne Arundel (1,740, the second largest in the State). For Baltimore County, international migration (2,402, third behind Montgomery and Prince George's) was a key component of its population increase.

Southern Maryland Grows the Fastest

The Southern Maryland Region had the fastest rate of population increase (1.6%) from April 1, 2000 to July 1, 2011. For most of the 2000s, the Southern Maryland Region also led the State in the rate of population growth. Since 2010, St. Mary's County had the largest percentage increase (2.2%) in both the Region and the State, and has led the Southern Maryland Region in each of the last six years. Once fast growing Calvert County had a 0.6 percent increase since 2010, ranked 12th. During the 1990s and early 2000s Calvert County typically led to the State in percentage increases with annual percentage gains often exceeding 3.0 percent, but has generally been below a 1.0 percent annual increase in each of the last six years. (See [Tables 4A, 4B and 4C](#) for annual population estimates, change and percent change from July 1, 2000 to July 1, 2011).

Baltimore City has Largest Population Decline

Four rural jurisdictions and Baltimore City are estimated to have experienced population declines over the 15-month period. The largest drop was in Baltimore City (-1,468, or -0.2%). This loss continues an historic pattern of population losses being driven by net domestic out migration. However, by and large, these losses have been relatively modest since the middle of the last decade. It is estimated that the City experienced net domestic out migration of 6,415 residents during the 15-month period, the largest in the State. On the positive side for the City, the domestic outflow over the last year (July 1, 2010 to July 1, 2011) of 4,959 was the second lowest since 2000, and was less than one-half the annual average domestic outflow of 10,318 in each of the first five years of the last decade (July 1, 2000 thru July 1, 2005). Also, another positive sign for the City is the addition to its population through net international migration, at 1,726 for the 15-month period, the fourth largest in the State.

The other four jurisdictions with population losses are either in Western Maryland or on the Eastern Shore. In Western Maryland both Allegany (-395, or -0.5%) and Garrett (-46, or -0.2) counties were estimated to have losses driven by both net natural *decrease* (i.e. deaths exceeding births) as well as net domestic out migration. The net natural decrease for Allegany County (-186) was the largest in the State, and has been typically the case over the last decade or so because of the older age structure of the County's population. In addition, the net domestic outmigration over the last year (-252) is larger than in the recent past.

On the Eastern Shore, both Somerset (-131, or -0.5%) and Caroline (-81, or -0.2%) are estimated to have lost population. Domestic out migration was the main reason for declines in both jurisdictions. This is a turnaround for both counties from growth in the last decade, particularly for Caroline. For example, between 2004 and 2007 Caroline County averaged just over 500 domestic in migrants per year. In the last year (2010 to 2011) the County experienced net *out* migration of 264.

The Majority of Growth Returns to Four Inner Suburban Counties and Howard

As discussed previously, the Census Bureau's current estimates indicate a continued concentration of growth in Montgomery, Prince George's, Anne Arundel and Baltimore counties (the four inner suburban counties) plus Howard County. This is more apparent when using 12-month annual data covering the July 1, 2000 to July 1, 2011 period. During the course of the last decade, the share of annual statewide population gains went from 76 percent in 2000/2001 to a low of just under 38 percent in 2005/2006 and back up to around 80 percent in two of the last three years (See [Chart 1.](#))

Western Maryland and Eastern Shore Share Declines Significantly

While outer suburban counties (Carroll, Harford, Frederick, Calvert, Charles and St. Mary's) have "zigged" while the five major counties "zagged," in shares of state population change, the biggest changes in share actually came from the more rural counties in Western Maryland and the Eastern Shore. For example, the share of statewide population change went from 9.1 percent in 2000/2001 to around 28 percent in 2006/2007, before shrinking back down and reaching a low point of 3.5 percent in 2010/2011.

There were several jurisdictions in these two regions which followed this expansion and contraction scenario over the course of the last 11 years. For instance, Washington County, which was the major source of population growth in the Western Maryland Region over the last 10 years, averaged an annual 2,000 gain per year from 2002 to 2006 at its peak, but has averaged only 600 per year in each of the last two years. In the Upper Shore Region, Cecil County also experienced a 2,000 annual average population gain from 2002 to 2006, but increased less than 500 in each of the last two years.

These increasing and decreasing shares, and rising and falling numeric gains, were for the most part a function of what was happening with net domestic migration. By and large, periods of rising shares corresponded with either increasing gains through domestic migration (for the outer suburban and Western Maryland and Eastern Shore regions) or smaller net out migration for the four inner suburban jurisdictions. (See [Chart 2.](#)) One of the main drivers for these net domestic migration patterns was what was happening with the job and housing markets. Rising prices in the middle of the last decade led people to migrate out of the four inner suburban jurisdictions to outer or exurban jurisdictions (and even from outer to exurban counties) to find less expensive housing. When the housing prices collapsed, coupled with the increased difficulties in getting mortgage loans in addition to job losses and high unemployment, overall mobility became more difficult, leading in part, to less out migration from the four inner suburban jurisdictions and less in-migration to outer suburban and exurban areas (and less migration from outer suburban to exurban areas).

While domestic migration has had different impacts on inner and outer suburban counties as well as exurban counties, international migration has been a significant growth factor mostly for the inner suburban counties. (See [Chart 3.](#))

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