

## **Central Jurisdictions Continue to Lead Maryland's Population Growth But increased domestic out-migration leads to a drop in their share of statewide growth**

The five central Maryland jurisdictions of Montgomery, Prince George's, Howard, Anne Arundel and Baltimore counties continue to dominate overall population growth in the state as they have in recent years, according to recently released population estimates for July 1, 2015 from the U.S. Bureau of the Census.<sup>1</sup> However, an increase in net domestic out-migration from these counties has meant that their share of overall statewide population growth has declined compared to previous years.

State-level estimates released in December 2015 showed that Maryland's population grew by 31,055 people between July 1, 2014 and July 1, 2015, ranked 14<sup>th</sup> largest among the 50 states and the District of Columbia, and the smallest increase since 2006/2007. The State's 0.52 percent increase during this period was below the 0.79 percent national change and was ranked 26<sup>th</sup>. Since April 1, 2010, the base year for these estimates, Maryland's population has expanded by 4.03 percent, slightly below the overall 4.10 percent national rate, and was ranked 22<sup>nd</sup> among all states. 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 2015](#).)

### **International migration and net natural change fuels growth in Montgomery and Prince George's**

Population growth in Maryland over the July 1, 2014 to July 1, 2015 period was led by Montgomery (9,640) and Prince George's (6,178) counties, the two largest counties in Maryland. (See [Table 1A](#) and [Table 1B](#) and [Chart 1](#) and [Map 1](#).) Growth in these two counties accounted for 50.9 percent of the *net* statewide change and was led by gains from international migration and net natural increase (i.e., births minus deaths). These two counties combined for well over one-half (57.2%) of the statewide growth from international migration and just over one-half (52.6%) of the statewide gain from net natural increase. (See [Table 2A](#) and [Table 2B](#) and [Table 2C](#) for birth, death and net natural change estimates, and [Table 3A](#) for international migration estimates). Montgomery and Prince George's counties were also number one and two, respectively, in gains from international migration throughout the 2000s.

Despite overall population gains, both Montgomery (-8,265) and Prince George's (-6,481) counties experienced significant net domestic out-migration over the last year.<sup>2</sup> Montgomery's net domestic out-migration has been increasing in each of the last four years and the most recent outflow was the largest in eight years. (See [Table 3B](#).) Prince George's most recent net domestic out-migration was substantially larger than in 2014 (-2,372) and was the largest in six years.

For both jurisdictions, recent outflows are far below what they were during the middle of the 2000s when the housing market was booming and residents were moving to outer suburban or more rural

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<sup>1</sup> Population Division, U.S. Bureau of the Census, release date March 24, 2016

<sup>2</sup> These are *net* migration numbers, i.e. *in-migration* minus *out-migration*. If the out-migration exceeds the in-migration flows, then the jurisdiction has overall net *out-migration*. If the inflows are greater than the outflows, then the jurisdiction has net *in-migration*. The individual inflows and outflows are not available for these estimates.

counties where desired housing was less expensive. For instance, during the four-year period from 2004 through 2007 Montgomery had average annual net domestic out-migration of 11,700 per year while Prince George's County's annual average net outflow was 11,900.

### **Howard, Anne Arundel and Baltimore counties lead the Baltimore Region**

Rounding out the top five numeric population increases in Maryland over the most recent 12-month period are Howard (4,709), Anne Arundel (3,909) and Baltimore (3,334) counties located in the Baltimore Region. Drivers for growth in Howard County (which at 1.5 percent was the largest percentage gain in Maryland) were international migration and net natural change in that order. Both have been significant sources of growth over the last several years but the gains from international migration over the last two years (averaging 1,900 per year) has been substantially more than in earlier years. At the same time, gains from net domestic migration has been lagging, reaching a six year low in 2014 (199), and even with a substantial increase in 2015 (to 970) is still well below the annual average gain of 2,091 experienced between 2008 and 2012.

For Anne Arundel County, the largest source of growth was from net natural increase (2,676, third largest in the state) followed by international migration (1,576). The county actually had an atypical small loss from domestic migration (-225), its first net outflow in seven years, which followed an unusually small gain in 2014 (477). For Baltimore County, international migration (4,142, third largest in the state behind Montgomery and Prince George's) was a key component of its population increase. The county also gained from net natural increase (1,457), but experienced net domestic out-migration (-2,535). Baltimore County more often than not has had net domestic outflows (nine out of the last 10 years) but the net outflow in the most recent year was the largest in seven years.

Elsewhere in the Baltimore Region, Harford County continued to grow very slowly and both Baltimore City and Carroll County lost population. Harford County is estimated to have grown by only 341 persons in the 2014/2015 period, the smallest gain in the last 15 years. A substantial reason for the small gain was the net domestic outflow of 882 in 2014/2015, the third consecutive year of net domestic out-migration and the largest in eight years.

Carroll County's population is estimated to have had a slight decline (-55) in 2014/2015, for the second time in the last four years. As in Harford, net domestic out-migration (-379) was the principal cause of the population loss. The City's population loss (-1,862) was substantial (see discussion below).

As of July 1, 2015, the Baltimore Region's share of Maryland's population was 45.7 percent, down from 46.1 percent at the beginning of the decade. The Baltimore Region has been growing more slowly than the state for decades, however. In 1969, for example, the Region's population made up 53.0 percent of statewide totals.

### **Southern Maryland Region no longer fastest growing**

For most of the 2000s, the Southern Maryland Region led the State in the *rate* of population growth, but in the last year (and since April 1, 2010) this Region has fallen just below the Suburban Washington

Region. (See [Table 4.](#)) In the last year, the three counties of the Southern Maryland Region grew by 0.7 percent, below the 0.8 percentage gain of the three counties of the Suburban Washington Region.<sup>3</sup>

Within the Southern Maryland Region, Charles County had the largest numeric (1,431) and second largest percentage (0.9%) increase in 2014/2015.<sup>4</sup> St. Mary's County grew by just over 1,000 (1.0%, the second largest percentage gain in the state). St. Mary's most recent gain was the largest in three years and is due to a pickup in net domestic in-migration (165) compared to virtually none in 2013/2014 (7) and a loss in 2012/2013 (-349, the first net outflow from the St. Mary's County since before 2000). As recently as 2010/2011, St. Mary's had a net gain of just under 1,000 people from net in-migration.

While population growth was fairly substantial in Charles and St. Mary's counties, it continues to be slow in Calvert County, growing by just 33 in 2014/2015, following an increase of 104 in the prior year, the smallest and second smallest gains since before 2000. During the 1990s and early 2000s Calvert County typically led the state in percentage increases with annual gains often exceeding 3.0 percent. (See [Tables 5A, 5B](#) and [5C](#) for annual population estimates, change and percent change from July 1, 2000 to July 1, 2015). The small gains over the last two years was due to net domestic outmigration (-396 in the most recent year and -233 in the prior year), a rarity for the county, as these two years were only the second and third time since 2000 that more people left the county than moved in.

#### **Baltimore City loses population, but revisions show stronger gains in prior years**

Baltimore City's estimated population loss of 1,862 (-0.3%) from July 1, 2014 to July 1, 2015 was a marked turnaround from (revised) gains over the previous three years. For the 2011 to 2014 period, the revised estimates have the City growing by just over 2,900 people.<sup>5</sup>

The City's estimated population loss during the 2014/2015 period was due to continued net domestic out-migration. Perhaps of some concern to the City is that the latest net domestic out-migration (-5,717) was just over 1,300 more than the outflow in the previous year, and the largest over the last six years. Despite the increased out-migration in 2014/2015, however, this latest outflow was well below losses which routinely occurred in the 2000s. At its height, net domestic out-migration losses from the City averaged 10,900 per year between 2001 and 2004, or nearly twice the outflow in the latest year. Where the City did gain in population over the last year was through international migration (2,552, the fourth largest in the State), and through net natural change (2,190, also the fourth largest in the State).

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<sup>3</sup> Over the April 1, 2010 to July 1, 2015 period, the Southern Maryland's percentage gain of 5.2 percent was also below the 6.1 percent increase for the Suburban Washington Region. (See [Table 4.](#))

<sup>4</sup> Charles County's numeric gain in 2014/2015 was the seventh largest in the State, while its percentage increase was tied for the fourth largest in the State. (See [Chart 2](#) and [Map 2](#) for the percent change over the last year.)

<sup>5</sup> The biggest revisions to previously reported population change occurred for the 2013/2014 period. The population change was originally reported as a population *loss* of 611, which was revised with the latest data release to a population *gain* of 496, (or an "increase" over the original estimate of 1,107). Most of this difference was due to a downward revision in the net domestic out-migration, from an originally reported net outflow of 5,317 to a revised net outflow of 4,376. Gains from international migration were also revised upward from 2,366 to 2,539.

It should be pointed out that despite the overall population loss in 2014/2015, the City is still showing an increase of 706 persons (0.1%) from April 1, 2010 to July 1, 2015, evidence of the first sustained population increase in the City since the 1950s. (See [Chart 3](#) and [Map 3](#) for change and [Chart 4](#) and [Map 4](#) for percent change since April 1, 2010.)

### **Five rural counties with population losses**

In addition to population losses in Baltimore City and Carroll County in the Baltimore Region, there were six, mostly rural, counties, which also experienced population declines between July 1, 2014 and July 1, 2015. The largest decline after the City was in Allegany County (-480, or -0.7%), with the latest drop making it six straight years of population losses. (See [Table 5B](#).) What drives the population declines in Allegany is both net natural *decrease* (i.e. deaths exceeding births) as well as net domestic out-migration. Allegany County has averaged a net natural decrease of 230 in each of the last five years, by far the largest in the state. Net natural decrease has been typically the case for the county over the last decade or so because of the older age structure of the county's population. Allegany's net domestic out-migration over the last year (-312) is very close to the average annual net outflow of 335 over the four previous years.<sup>6</sup> Unlike Baltimore City, which has shown evidence of turning around population declines extending back to the 1950s, Allegany County has not yet made that turnaround and continues to lose household population as it has since the 1950s. Its total population loss this decade of 2,559 (-3.4%) is the largest in the state.

Garrett County, also in the Western Maryland Region, also continues to lose population, with an estimated loss of 192 (-0.6%) in 2014/2015. While there have been a couple of years of small increases, overall since 2010 the county has had a net loss of just over 600 residents (-2.1%) over the last five plus years. This loss comes from Garrett's modest net natural decrease (-70 since April 1, 2010) as well as fairly constant net domestic out-migration. The net outflow in the most recent year (-218), while less than in the previous year (-270), was at the higher end of net out-migration flows since 2000.

The four other counties with population losses were all on the Eastern Shore: Talbot (-48, or -0.1%) and Kent (-6, or 0.0%) on the Upper Eastern Shore and Dorchester (-143, or -0.4%) and Worcester (-23, or 0.0%) on the Lower Eastern Shore. Domestic out-migration was a component of these losses in two counties: Talbot (-11) and Dorchester (-153). In addition, all four counties had more deaths than births, with the largest net natural decrease in Worcester (-197) and Talbot (-120).

Growth was strongest on the Eastern Shore in Wicomico County, which grew by 602 (0.6%) people in 2014/2015. Wicomico is one of only two counties on the Eastern Shore (the other being Cecil) which have not experienced a population loss sometime during the 2010 to 2015 period. Still growth in Wicomico has definitely slowed in recent years, with annual population gains averaging 686 per year

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<sup>6</sup> Allegany County typically experiences population losses through net domestic out-migration, although in five out of the last 15 years, Allegany County had net gains from domestic migration. (See [Table 3B](#).) However, since the Census Bureau incorporates net changes in group quarters population into the net domestic migration estimates, and since Allegany County has a large (and growing) group quarters population (from federal and state prison facilities as well as a university), it is more than likely that these net gains from migration were the result of increased group quarters populations rather than from the movement of household population into the county.

between 2010 and 2015, a bit more than one-half the average annual gain of 1,286 per year in the 2005 to 2010 period.

Overall, there are a total of seven counties located either in Western Maryland or on the Eastern Shore which experienced population declines over the April 1, 2010 to July 1, 2015 period: Allegany (-2,559), Somerset (-702), Garrett (-637), Caroline (-509), Kent (-410), Talbot (-270) and Dorchester (-234). The greatest increase by far during this time period was in Wicomico County (3,637, or 3.7%).

### **Western Maryland and Eastern Shore share of statewide growth still at low levels**

While six out of the eight jurisdictions with population losses in 2014/2015 were in Western Maryland or on the Eastern Shore, the slowdown in growth in these two regions started with the collapse of the overheated housing market and the beginning of the Great Recession.<sup>7</sup> **Chart 5** illustrates the share of total statewide population growth attributed to these two regions in addition to two other groupings: 1) Baltimore City and the four inner suburban counties and 2) the outer suburban counties. The largest share of statewide growth for Western Maryland and the Eastern Shore occurred in 2006 and 2007 when the combined share was nearly 30 percent, up from under 10 percent in the beginning of that decade. By 2011/2012 the combined population change for these counties was actually a net loss, and after bumping up to 0.6 percent in the following year, fell again to a net loss in 2013/2014. In the most recent year, the share of these 12 counties rose to 1.6 percent of statewide population growth.

There were several jurisdictions in these two regions which followed this rapid expansion and contraction scenario over the course of the last 15 years. For instance, Washington County, which was the major source of population growth in the Western Maryland Region over the last 15 years, averaged an annual gain of 2,000 per year from 2002 to 2006 at its peak, but has averaged only 369 per year over the last five years. In the Upper Eastern Shore Region, Cecil County also experienced a 2,000 annual average population gain from 2002 to 2006, but increased at an average of just 244 per year over the last five years.

### **Outer suburban share increases while inner suburban share declines for first time in five years**

Inner and outer suburban counties also had expanding and contracting shares of statewide growth over the course of the last 15 years. The largest share for the outer suburban counties<sup>8</sup> also occurred in the mid-2000s, peaking in 2006 at 45 percent of net statewide growth, and fell to less than one-half that share (21.2%) by 2009 before fluctuating around 25 percent from 2010 to 2014. In the most recent period, however, the share of the inner suburban counties rose to 30.2 percent, the largest in eight years, with the bulk of this growth occurring in Howard County.

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<sup>7</sup> The Great Recession lasted from December 2007 to June 2009

<sup>8</sup> Carroll, Harford Howard in the Baltimore Region, Frederick in the Washington Suburban Region, and Calvert, Charles and St. Mary's in the Southern Maryland Region

The four inner suburban counties<sup>9</sup> (paired with Baltimore City), started out at the beginning of the last decade accounting for over one-half (54.0%) of statewide population growth before declining to around 28 percent in 2006 and 2007 when the housing bubble was peaking. Since that time, the share of these five jurisdictions of statewide population gains has risen quite dramatically and averaged 73.5 percent between 2010 and 2014. However, in the most recent year, the share of statewide population growth for these five jurisdictions fell to 68.3 percent.

These increasing and decreasing shares, along with 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 losses for the four inner suburban jurisdictions. (See [Chart 6](#).) One of the main drivers for these net domestic migration patterns was what was happening with the job and housing markets. Rising home 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 counties to exurban counties) to find less expensive housing. When housing prices collapsed and mortgage loans became more difficult to obtain, along with job losses and high unemployment, overall household mobility was greatly reduced, leading to less out-migration from the four inner suburban jurisdictions and less in-migration to outer suburban and exurban areas. It's only within the last year or two with increasing job gains and declining unemployment has mobility begun to rise again. However, while this has meant increased domestic out-migration for the four inner suburban jurisdictions and Baltimore City, it has not meant increased in-migration to the seven outer suburban jurisdictions or the 12 mostly rural jurisdictions in Western Maryland and on the Eastern Shore. Rather, it has mostly translated into increased net domestic out-migration from Maryland to other states.

While domestic migration has had different impacts on inner and outer suburban counties as well as exurban counties over the course of the last 15 years, international migration has been a significant contributor to population growth mostly for the inner suburban counties and Baltimore City. (See [Chart 7](#).) Since 2000, the four inner suburban counties and Baltimore City captured 86.9 percent of the total statewide gain from international migration.<sup>10</sup>

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<sup>9</sup> Anne Arundel and Baltimore counties in the Baltimore Region and Montgomery and Prince George's counties in the Washington Suburban Region

<sup>10</sup> Beginning with state population estimates for July 1, 2014, which were published in December 2014, the U.S. Census Bureau utilized a different methodology for estimating net international migration. This revised methodology, which was used to re-estimate international migration for all years in the current decade, boosted the gains to Maryland from international migration compared to previous estimates and filtered down to most of the central jurisdictions in the state.