2024-25 Membership Forecast

North Carolina State Board of Education

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Data for the People

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CAROLINA DEMOGRAPHY

About Carolina Demography

Who we are

Carolina Demography is the applied demography unit of the Carolina Population Center (CPC) at UNC-Chapel Hill. We are a non-partisan team of population scientists working for the people of North Carolina.

Our Mission

We help people understand a changing North Carolina to make informed decisions.

About Carolina Demography: What We Do

Find and Collect Data

We work with you to determine the data you need, and where and how to access that data.

Clean, Analyze, & Interpret Data

We use rigorous methods to translate the data and provide meaningful context.

Communicate data and engage stakeholders

We strengthen the capacity of your organization to communicate data-driven ideas.

Forecast Methodology

Methodology: Data Sources

Membership Data

- Traditional Public School Enrollment: NC Department of Public Instruction
- Charter School Enrollment: NC Department of Public Instruction
- Home School Enrollment: NC Department of Administration
- Private School Enrollment: NC Department of Administration

Opportunity Scholarships:

- NC State Education Assistance Authority
- NC OSBM S406/H823 Impact Analysis

Births

- NC Center for Health Statistics

Methodology: The Forecast

- **Traditional Public Schools (hereafter Public)**
  - A ***Modified* Grade Progression Ratio (GPR)** method, with a weighted average of 50% (most recent), 25%, and 25% (least recent) of GPRs from the last three years.
  - Incoming Kindergarten classes calculated by applying weighted average births-kindergarten-ratios
  - Decreased forecast in middle and low series. (explained in Forecast Series slide)

- **Charter Schools**
  - Starting with a NCDPI Financial and Business Services Division forecast for the next year, we extrapolate growth into the future for 4 more years, then implemented the following updates:
    - Fit a time-series model (damped Holt's method w/ phi = 0.95) for charters open for 5+ years.
    - If forecast was higher than the one provided by the charter school, we changed our forecast to the one provided.
    - If the forecast was negative, we changed our forecast to the prior school year total.
    - Capped the forecast increase for a school at 15%.
  - Used the 2025 grade distribution for future years.

Methodology: The Forecast

- **Private Schools**
  - Models consider the changes to the Opportunity Scholarship program.
  - Started with a time-series forecast model, like charter schools, of statewide enrollment for private schools for 6 years, with only data up to the 2023-24 school year available.
  - Created district-level forecast using shifting of share of the state total.
  - Applied state-level grade distribution from 2021-22 to future years, with said year being the last one grade-level private enrollment was reported.
  - Increased the forecast as explained in the Forecast series section.

- **Home Schools**
  - Used a time-series model, like public and charter, to forecast the state total.
  - Forecast shifting share of totals to each county.
  - Applied the 2023-24 (latest available) school year grade distribution to future years.

Methodology: The Forecast Series/Scenarios

3 forecast series which assume different market share scenarios

- **Baseline**
  - The assumption of the baseline forecast is that we will follow historical trends in public, private and charter school growth.
- **Medium Series**
  - Using NC OSBM estimates and 2024-25 Opportunity Scholarships awarded, we extrapolate number for future years, and how many of those students will change from public to private schools, decreasing public school enrollment while increasing the private school enrollment.
- **Low Series**
  - Similar to Medium Series, but assumes
    - An increased number of Opportunity Scholarships more in line with additional applications seen for 2024-25 that were not fully funded
    - A slightly lower percentage of the students are coming from public schools than in the medium series.

State-Level Forecasts

Figure 1. North Carolina Public Schools Forecasts: Series Comparisons

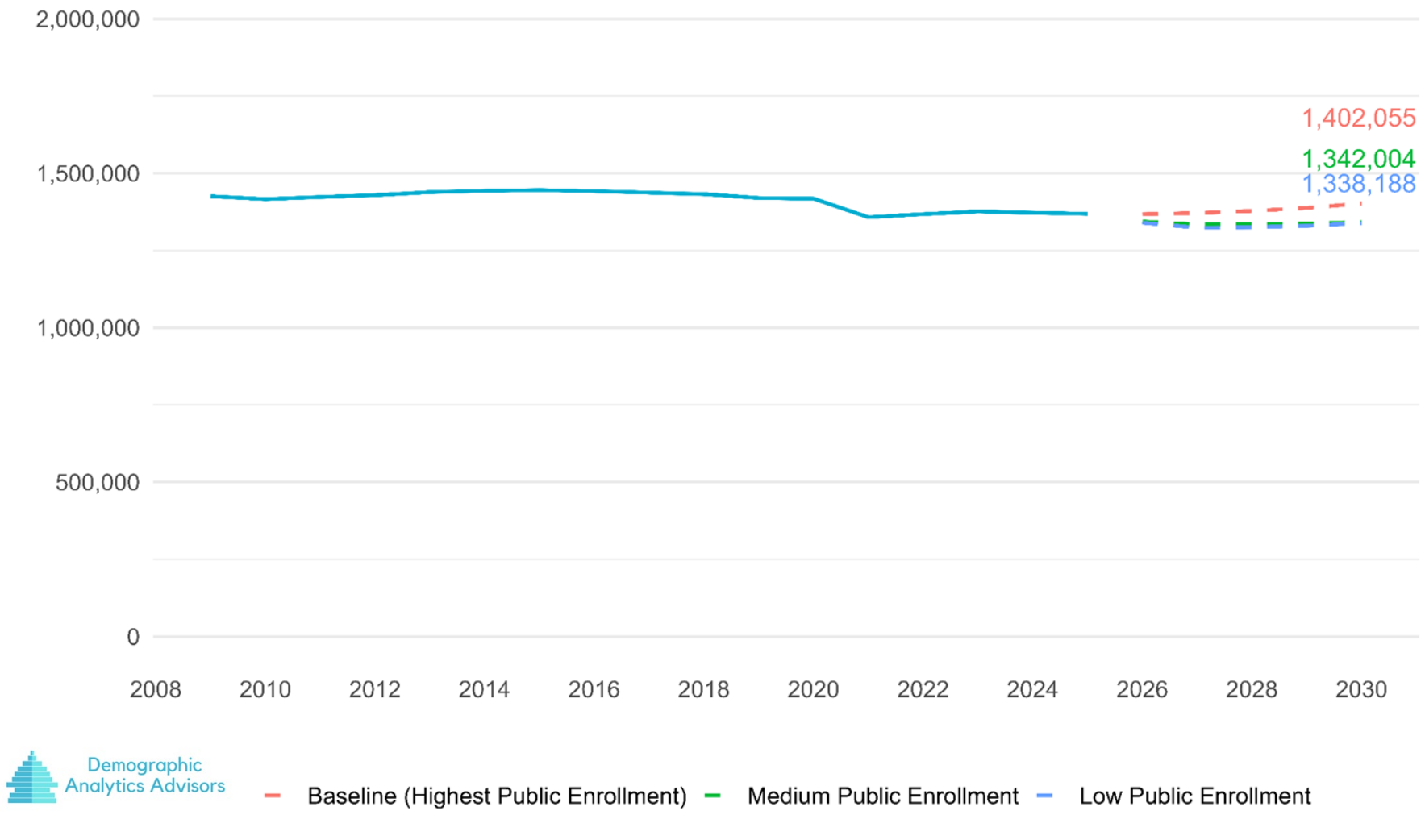


Figure 2. North Carolina Private Schools Forecasts: Series Comparisons

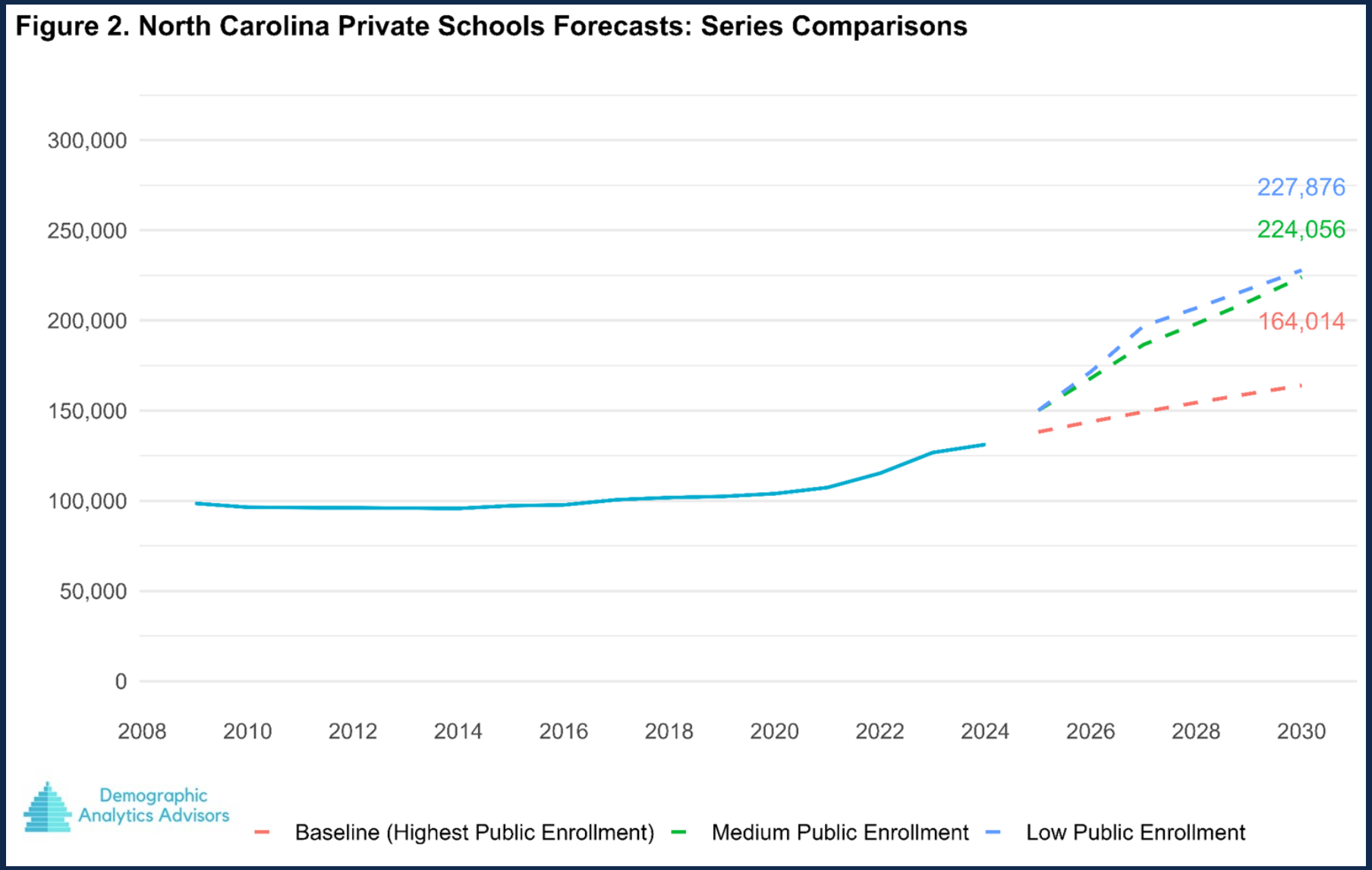


Figure 3. North Carolina Charter Schools Forecasts: Series Comparisons

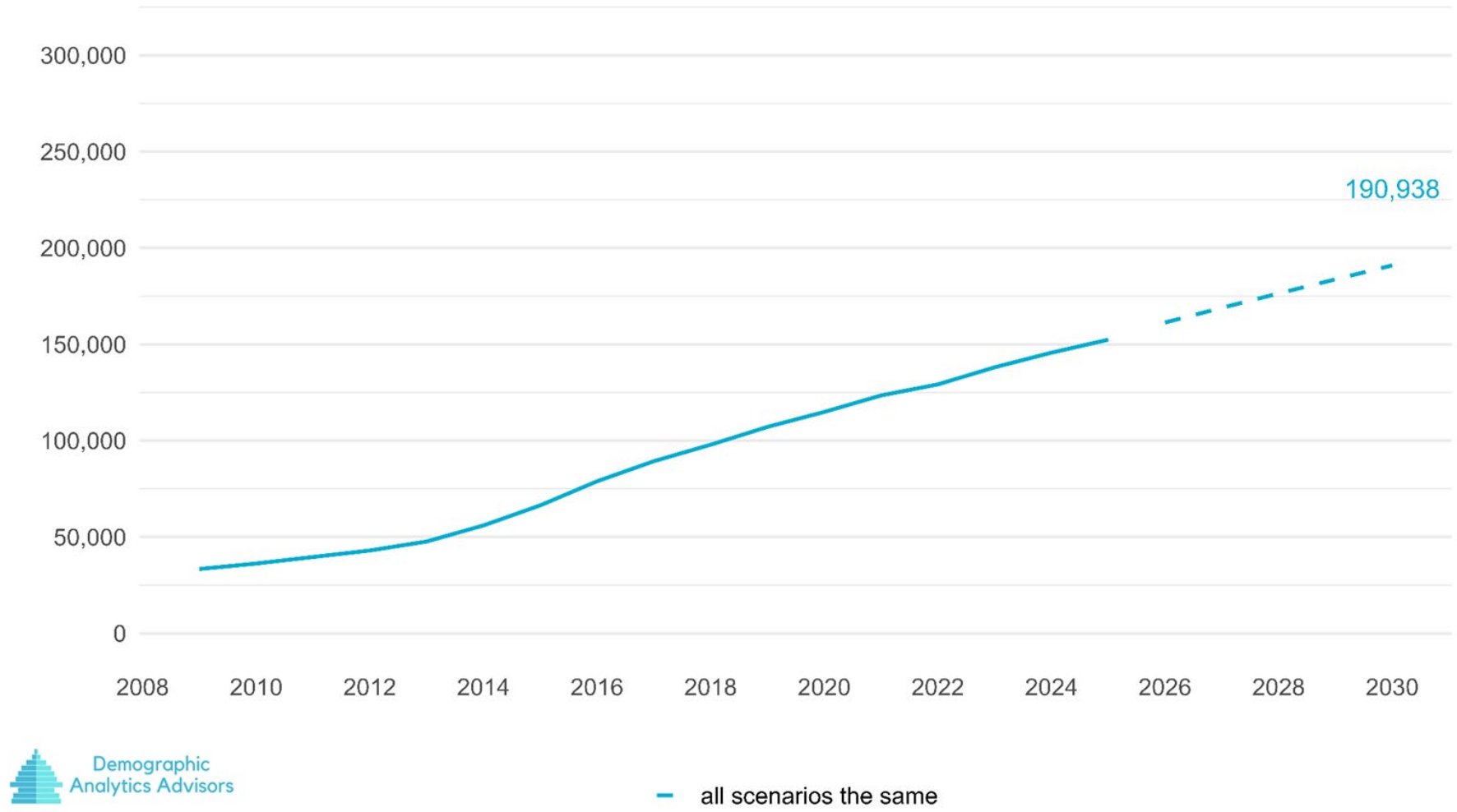
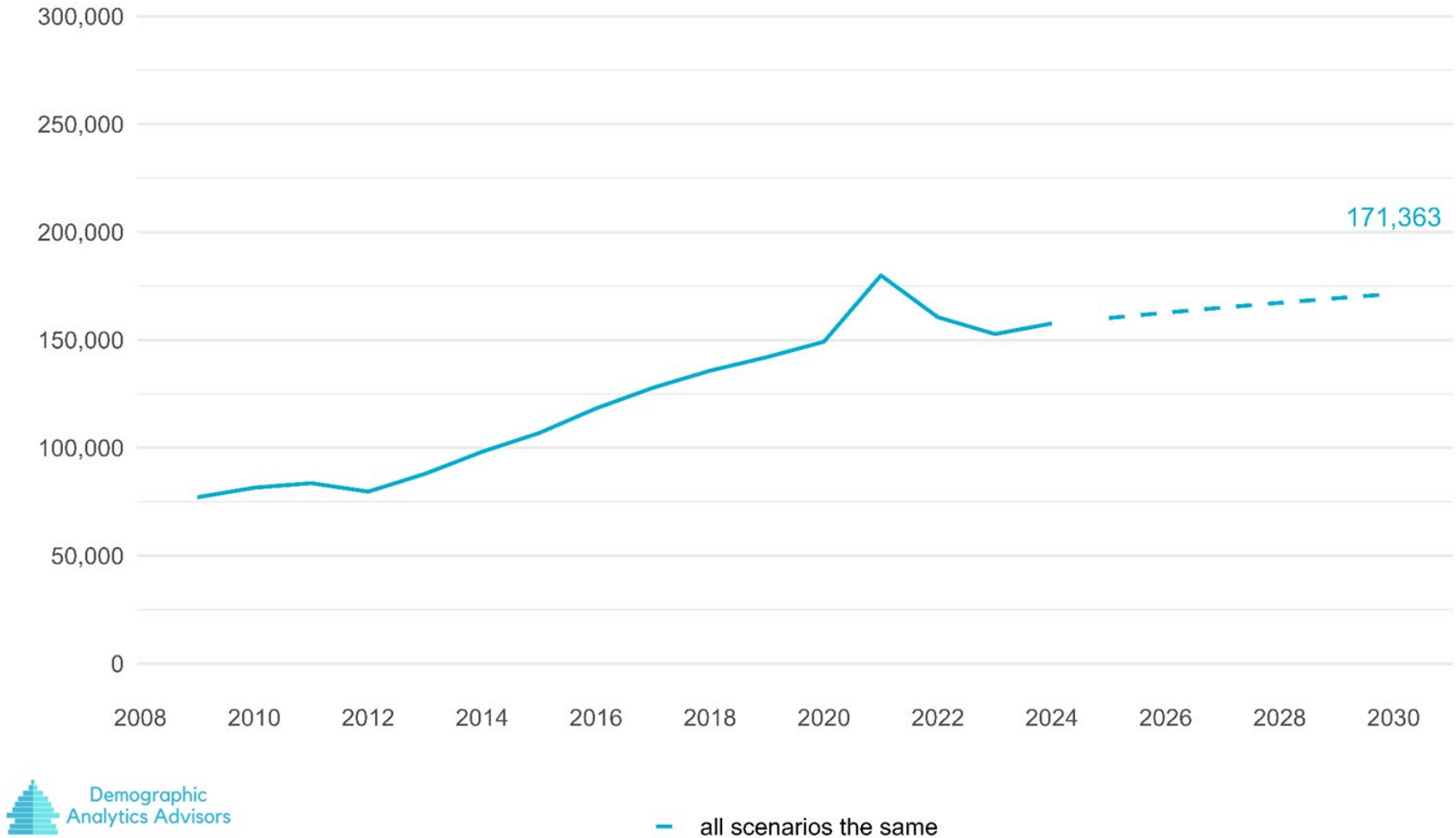


Figure 4. North Carolina Home Schools Forecasts: Series Comparisons



Detailed Forecasts Results

Table 1. Top 10 Fastest-Growing Public Schools in North Carolina by Student Enrollment Increase

Projected Growth 2024-25 to 2029-30

LEA	County	LEA Name	2024-25 Enrollment	2029-30 Enrollment	Projected Growth	Projected Growth Total Percent	Projected Annualized Growth Rate
600	Mecklenburg	Charlotte-Mecklenburg Schools	141,726	151,255	9,529	6.72%	1.31%
920	Wake	Wake County Schools	161,115	168,068	6,953	4.32%	0.85%
510	Johnston	Johnston County Public Schools	37,030	40,757	3,727	10.06%	1.94%
130	Cabarrus	Cabarrus County Schools	35,142	38,644	3,502	9.97%	1.92%
360	Gaston	Gaston County Schools	30,573	33,670	3,097	10.13%	1.95%
010	Alamance	Alamance-Burlington Schools	22,338	24,049	1,711	7.66%	1.49%
550	Lincoln	Lincoln County Schools	11,426	12,795	1,369	11.98%	2.29%
490	Iredell	Iredell-Statesville Schools	20,696	22,016	1,320	6.38%	1.24%
290	Davidson	Davidson County Schools	17,688	18,987	1,299	7.34%	1.43%
900	Union	Union County Public Schools	40,870	42,145	1,275	3.12%	0.62%

Table 2. Top 10 Fastest-Growing Public Schools in North Carolina by Percentage Increase in Student Enrollment

Projected Growth 2024-25 to 2029-30

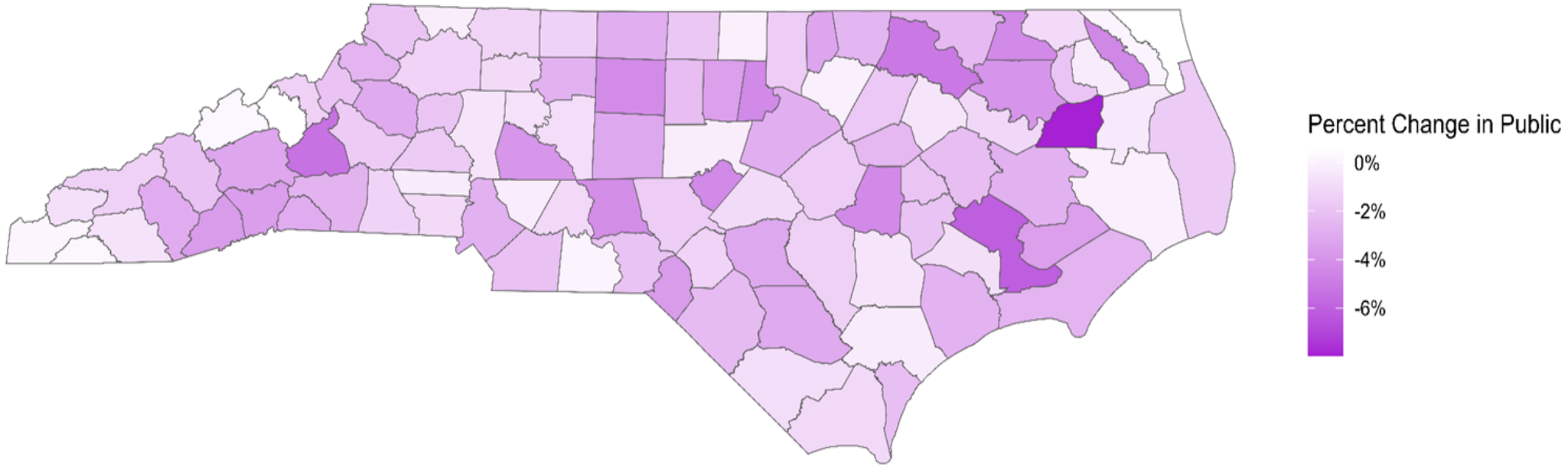
LEA	County	LEA Name	2024-25 Enrollment	2029-30 Enrollment	Projected Growth Total Percent	Projected Annualized Growth Rate	Projected Growth
270	Currituck	Currituck County Schools	4,518	5,173	14.50%	2.74%	655
550	Lincoln	Lincoln County Schools	11,426	12,795	11.98%	2.29%	1,369
995	Yancey	Yancey County Schools	2,042	2,283	11.80%	2.26%	241
350	Franklin	Franklin County Schools	7,855	8,750	11.39%	2.18%	895
570	Madison	Madison County Schools	2,060	2,281	10.73%	2.06%	221
360	Gaston	Gaston County Schools	30,573	33,670	10.13%	1.95%	3,097
510	Johnston	Johnston County Public Schools	37,030	40,757	10.06%	1.94%	3,727
130	Cabarrus	Cabarrus County Schools	35,142	38,644	9.97%	1.92%	3,502
220	Clay	Clay County Schools	1,254	1,377	9.81%	1.89%	123
491	Iredell	Mooresville Graded School District	5,794	6,353	9.65%	1.86%	559

Changes in Market Share

Baseline Series

Figure 5. Projected Percent Change of Students Enrolled in Public Schools: School Year 2024-25 to 2029-30

Forecast Series: Baseline (Highest Public Enrollment)

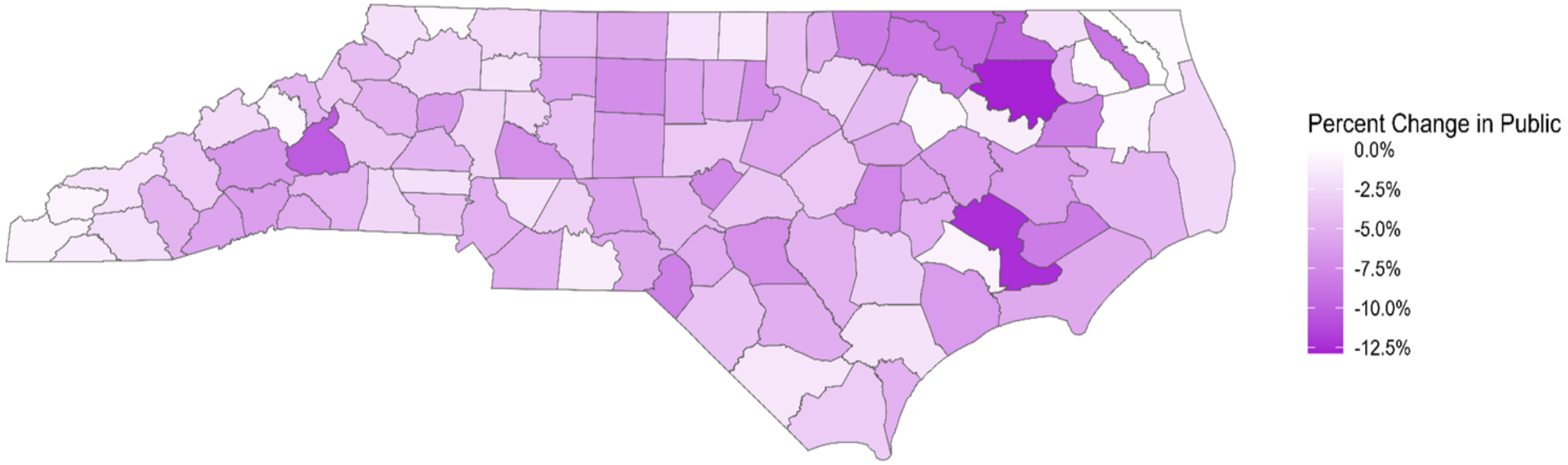


- We project general declines in *traditional public school market share for most* counties, with shares in a couple counties even decreasing by over 6%.
- Some counties do have slightly increasing proportions going into public school as well, but not by much.

Medium Series

Figure 6. Projected Percent Change of Students Enrolled in Public Schools: School Year 2024-25 to 2029-30

Forecast Series: Medium Public Enrollment

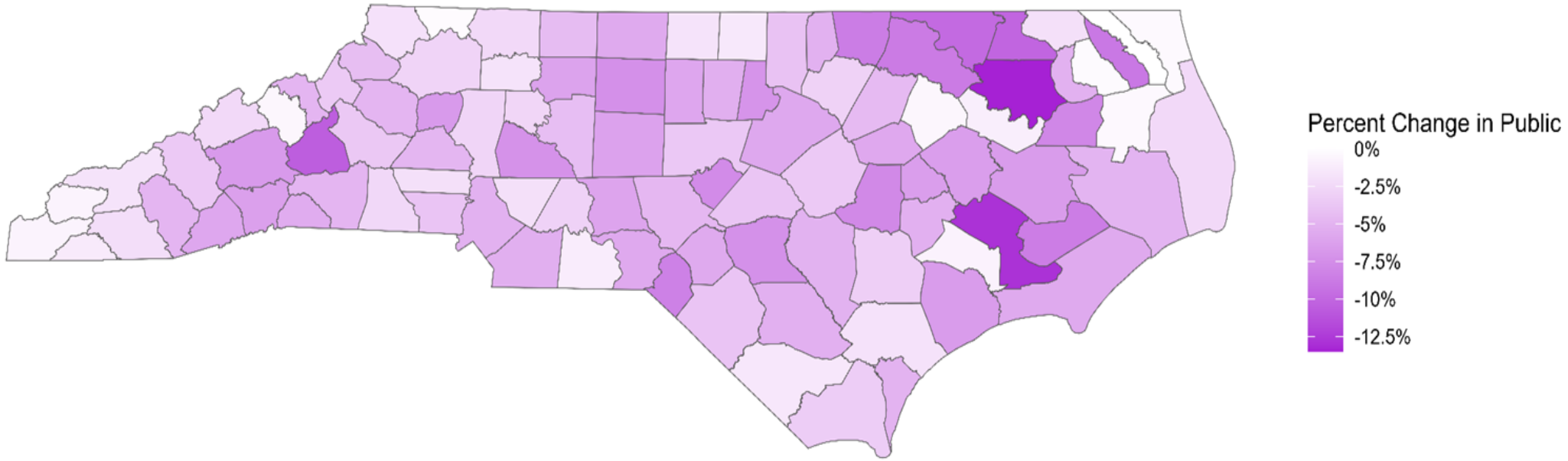


- In the medium series we see that nearly all counties are decreasing in the percentage of their students that are in public schools, with some percentage point declines in public school enrollment over 12%.

Low Series

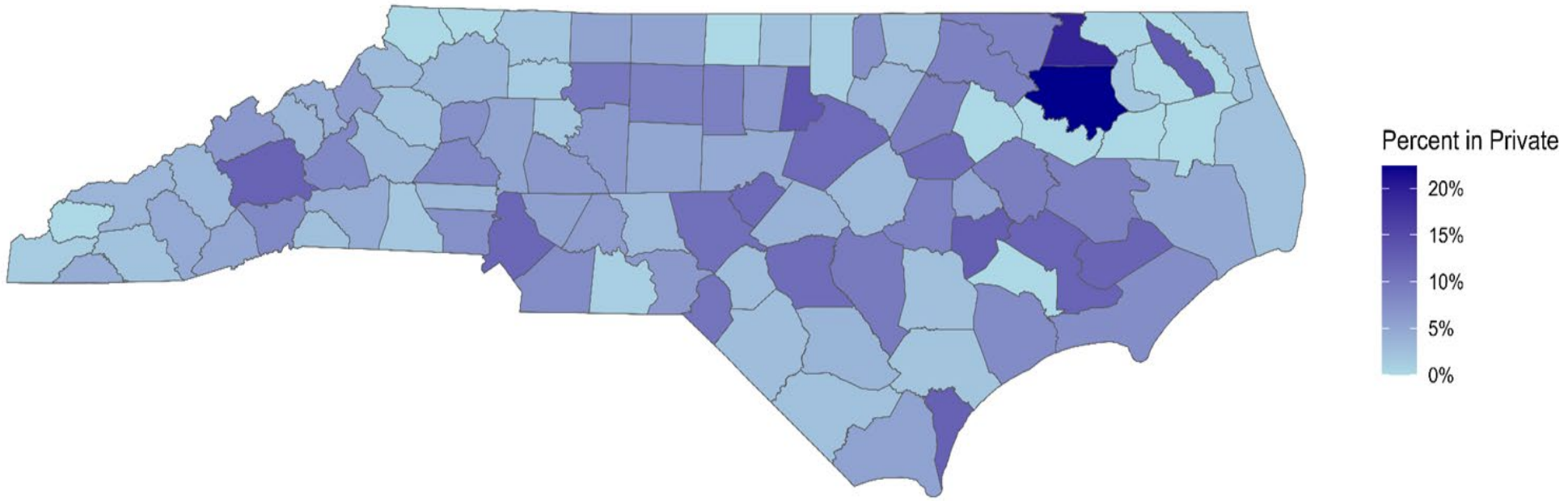
Figure 7. Projected Percent Change of Students Enrolled in Public Schools: School Year 2024-25 to 2029-30

Forecast Series: Low Public Enrollment



- The low public school enrollment series is similar to the medium forecast, with declines again over 12%. Most counties' public schools are losing even more students to private schools.

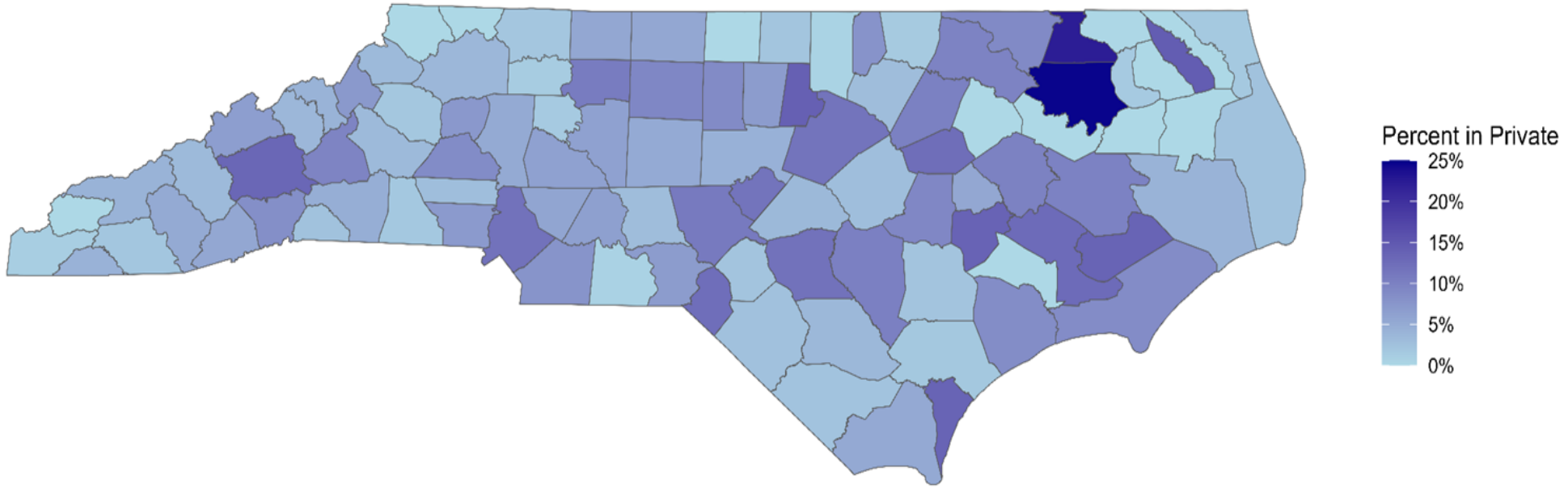
Figure 8. Percentage of Students Enrolled in Private Schools: School Year 2024-25



- The current use of private school versus other school types, varies widely from county to county, with some counties having none, to some having over **1** out of **5** students in private schools.

Figure 9. Projected Percentage of Students Enrolled in Private Schools: School Year 2029-30

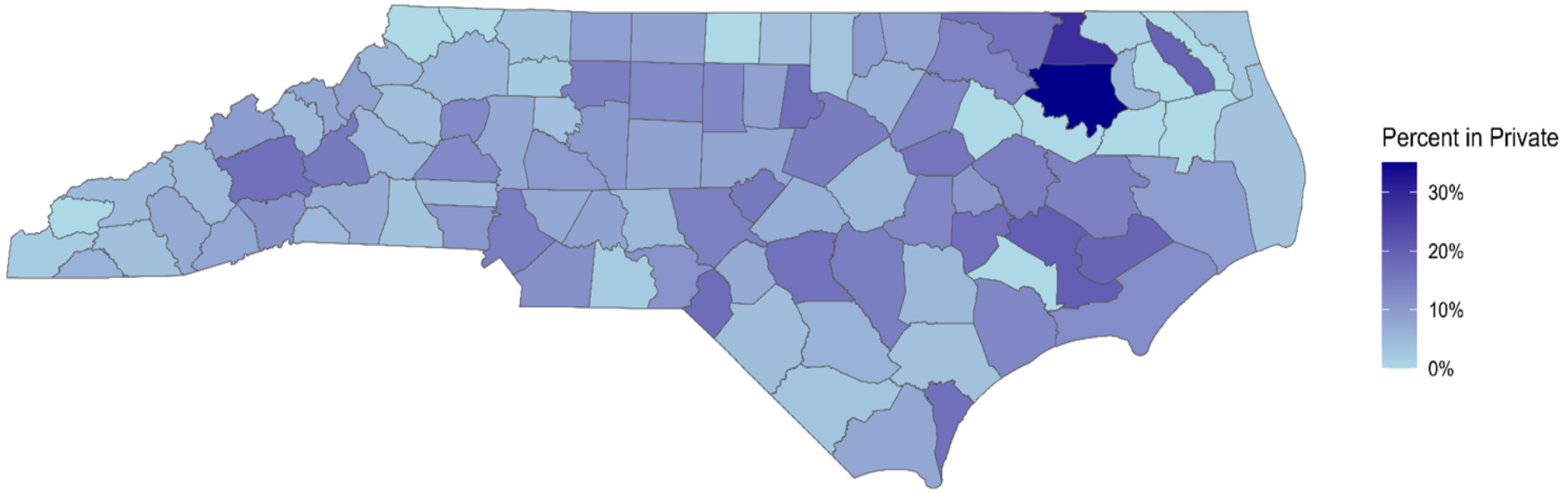
Forecast Series: Baseline (Highest Public Enrollment)



- The 2029-30 baseline forecast is very similar to the 2024-25 percentages, only marginally higher.

Figure 10. Projected Percentage of Students Enrolled in Private Schools: School Year 2029-30

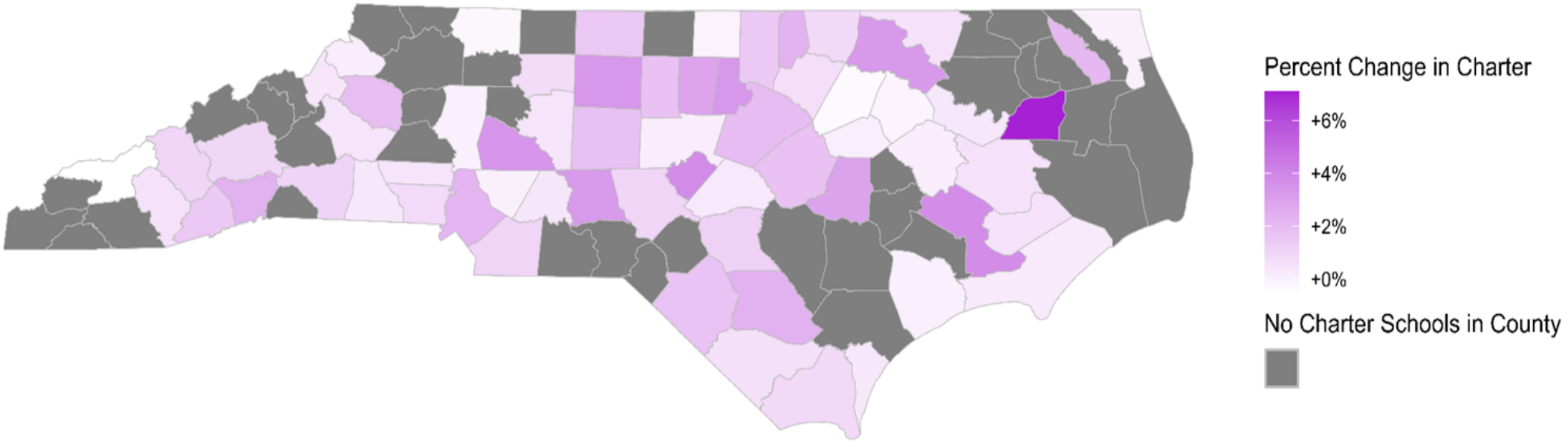
Forecast Series: Medium Public Enrollment



- In the medium series we can see that the darkest colors in the map are now in the 30% range instead of the 20% range.

Figure 12. Projected Percent Change of Students Enrolled in Charter Schools: School Year 2024-25 to 2029-30

Forecast Series: a_baseline



- Charter schools are also growing, relatively, throughout the state. Several counties – in grey – do not have any charter schools, however the ones that do, are growing their share of students.

1-Year Forecast Evaluation 2025

Figure 15. Public LEA Enrollment 2025 vs 1-Year Forecast

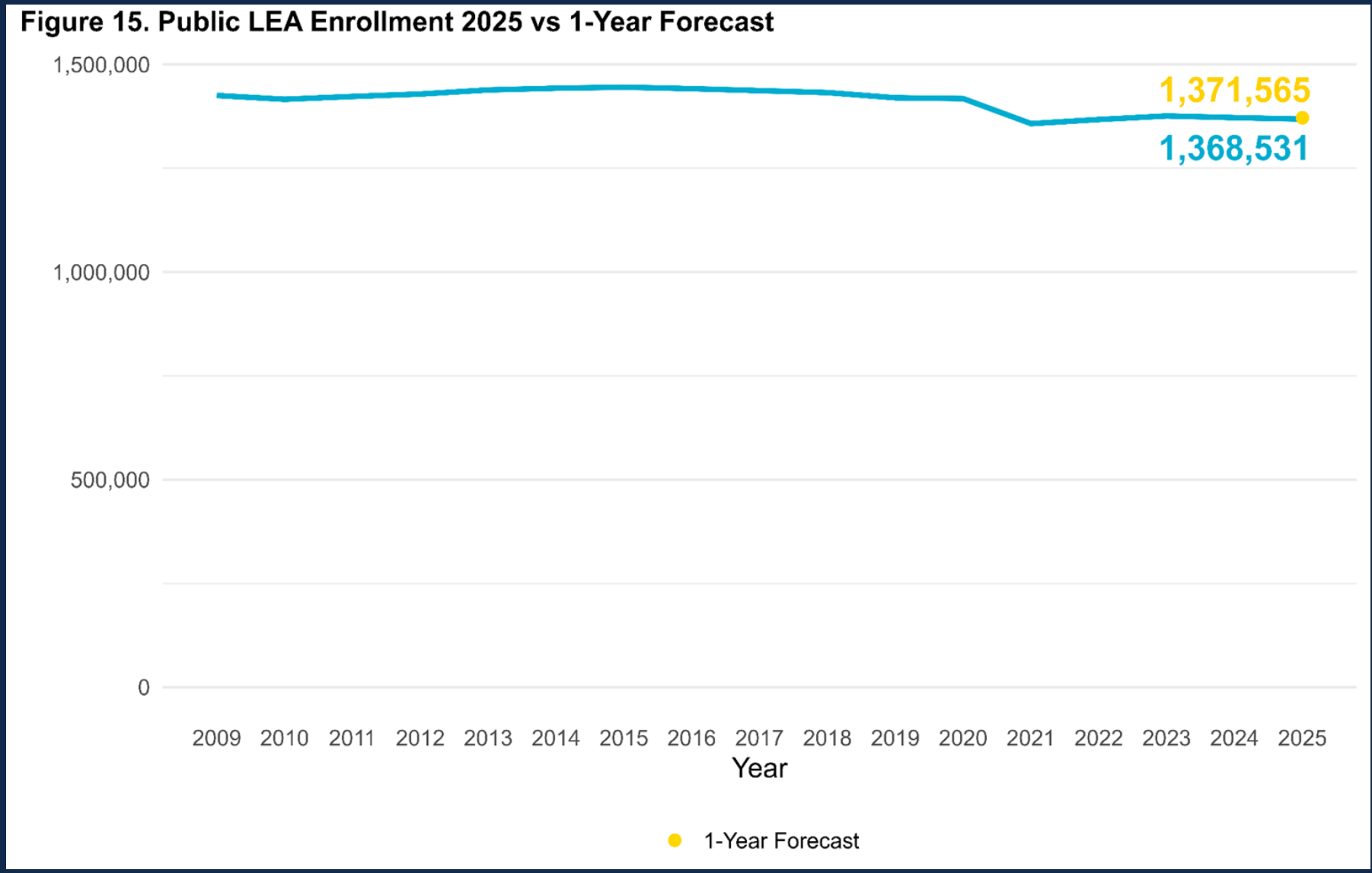


Figure 16. LEA Charter Enrollment 2025 vs 1-Year Forecast

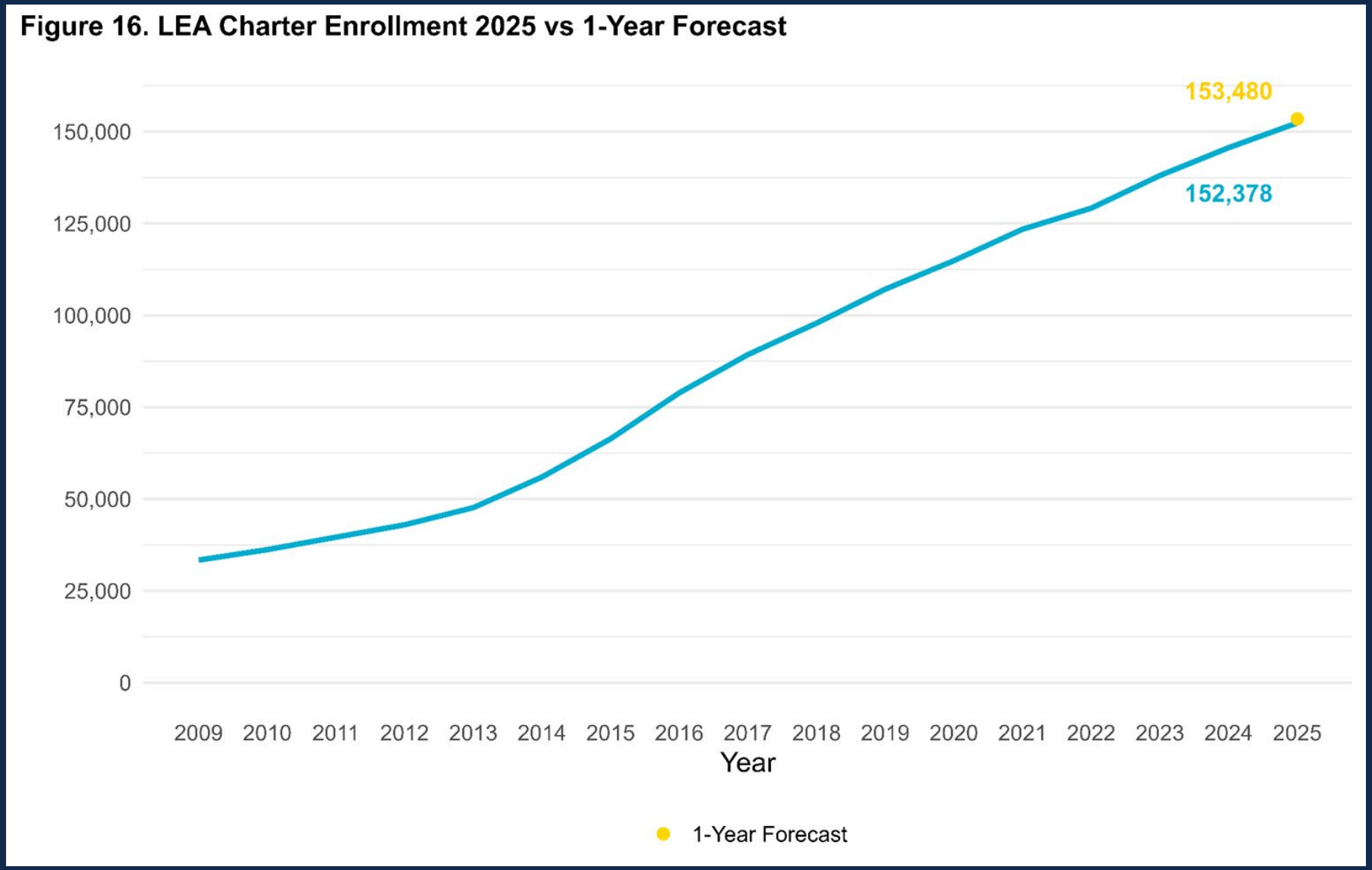
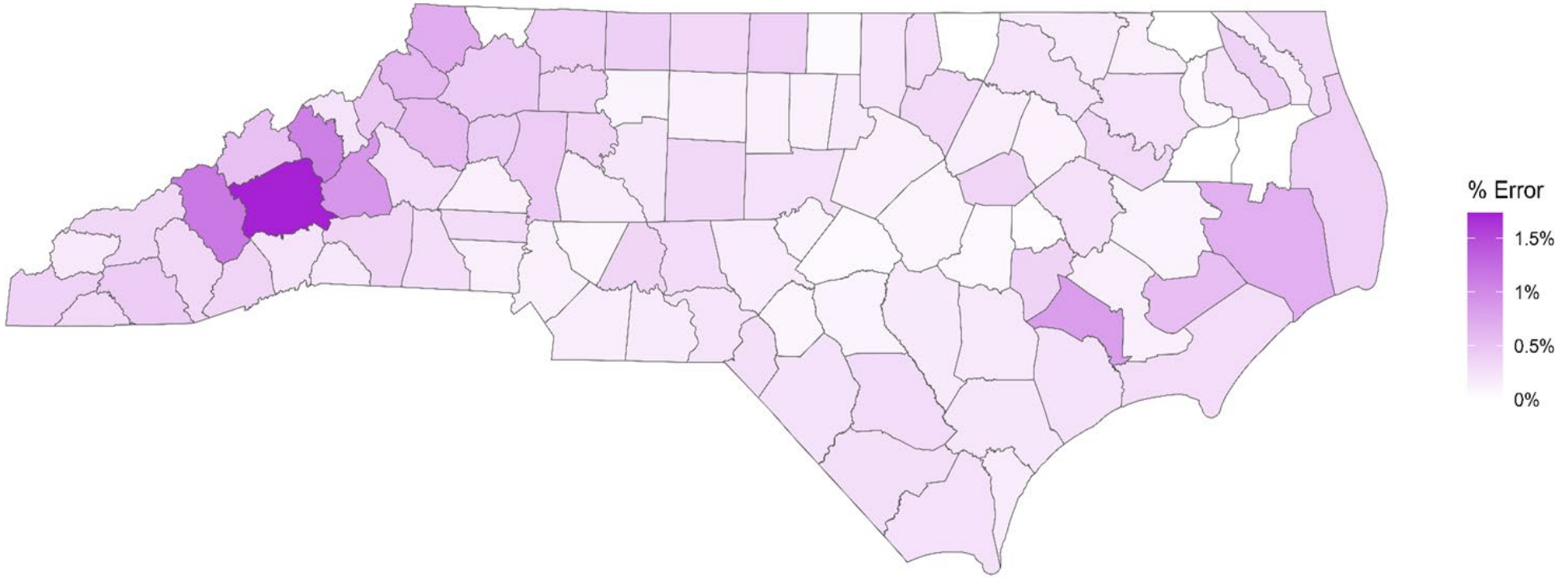
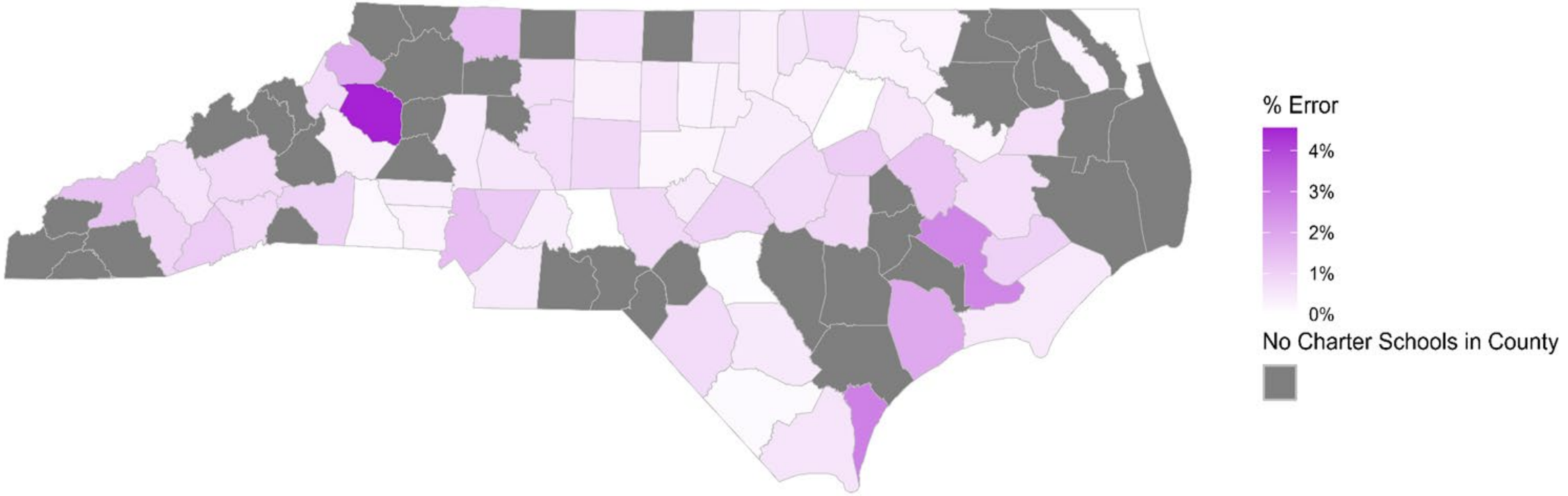


Figure 17. County Public LEA Enrollment: 1-Year Forecast vs 2025 Actual



The map above depicts errors for public LEA enrollment at the county level. We can see most counties were forecasted accurately, with the highest errors being only 1.5%. For public schools at the LEA level in 2025, the forecasts were generally close to actual enrollment, with an average error of 0.3% when combining all grades.

Figure 18. County Charter LEA Enrollment: 1-Year Forecast vs 2025 Actual



- The 1-year forecast at the county level for charters was good overall, averaging an error of 0.8% across all counties.
- The largest relative county errors came from Caldwell at around 4.6%, and New Hanover and Craven around 2.8%. All other county errors were below 2%.

Additional Considerations

- The COVID-19 pandemic affected the historical time-series of enrollment trends complicating our understanding of how future trends will occur. Adjustments such as removal of historical data points have been made in our forecast.
- We need to better understand both where students attend school AND where they live. Another issue is the potential for undercounts in 2020 Census and thus under estimation/projection of school age population.
- Fertility rates have been declining throughout NC and the United States; however, some areas are growing markedly from in-migration.
- Changes in the market share of traditional public schools versus other types have, and could in the future, be rapid, due to the pandemic, and legislative changes.
- Hurricane Helene introduces uncertainty into our enrollment forecast for all counties as the disaster impacts infrastructure, economics, and families.

Thank you

Questions

Work With Us

What questions do you have about your community?

What data do you need to make better decisions?

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Appendix

Table 3. Lowest Counties: Percent of Ages 5-17 Enrolled in County

County	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Warren	82%	81%	79%	76%	74%	73%	72%	72%	71%	71%
Onslow	99%	99%	97%	95%	92%	88%	85%	82%	79%	77%
Caswell	89%	88%	89%	84%	83%	82%	82%	83%	83%	84%
Jackson	85%	85%	84%	84%	84%	83%	83%	83%	84%	85%
Franklin	95%	94%	86%	85%	84%	83%	83%	83%	84%	85%
Hoke	96%	95%	95%	94%	94%	93%	93%	92%	91%	91%
Catawba	99%	96%	95%	94%	94%	93%	93%	93%	93%	93%
Davie	100%	100%	98%	97%	96%	95%	95%	95%	94%	94%
Chowan	100%	102%	100%	97%	95%	94%	93%	93%	94%	94%
Davidson	100%	96%	94%	91%	91%	90%	90%	91%	92%	95%

We do expect some counties to have significantly more or less of their population enrolled in school in their counties than others.

Many of the lowest percentage counties in terms of students who likely attend school outside of the county are either near larger cities just over county boundaries or are home to large numbers of military children who may attend school on the base and would not be included in our enrollment numbers.

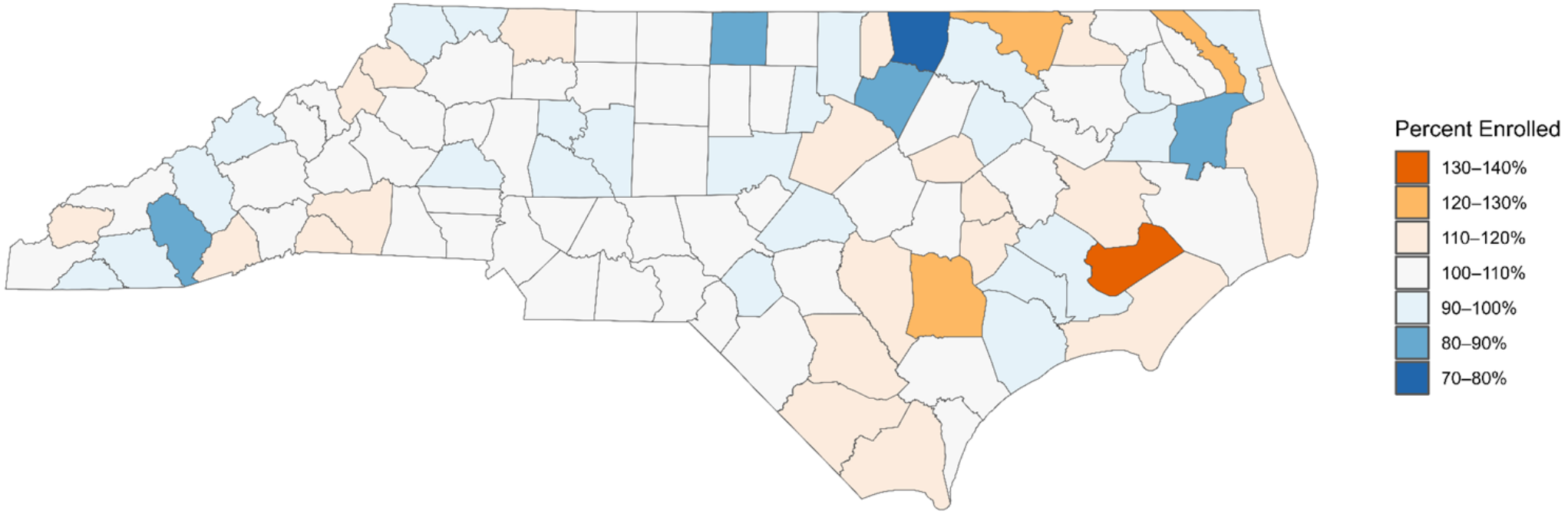
Table 4. Highest Counties: Percent of Ages 5-17 Enrolled in County

County	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Pamlico	132%	133%	147%	143%	136%	138%	140%	142%	147%	152%
Camden	107%	113%	115%	118%	123%	130%	135%	140%	145%	148%
Hyde	115%	105%	98%	98%	105%	109%	115%	121%	127%	132%
Brunswick	107%	109%	111%	114%	116%	118%	121%	123%	125%	126%
Watauga	113%	112%	116%	115%	117%	119%	121%	123%	125%	126%
Carteret	112%	112%	112%	112%	116%	116%	118%	121%	122%	124%
Perquimans	98%	100%	101%	103%	107%	109%	114%	118%	121%	124%
Lee	101%	101%	107%	107%	108%	110%	113%	116%	120%	124%
Northampton	122%	127%	124%	122%	124%	125%	125%	126%	126%	123%
Rutherford	108%	110%	112%	113%	113%	115%	117%	119%	121%	123%

Many of these are counties that are near large population centers or are near some of the counties with the lowest percentages of enrolled students per population of school attending age.

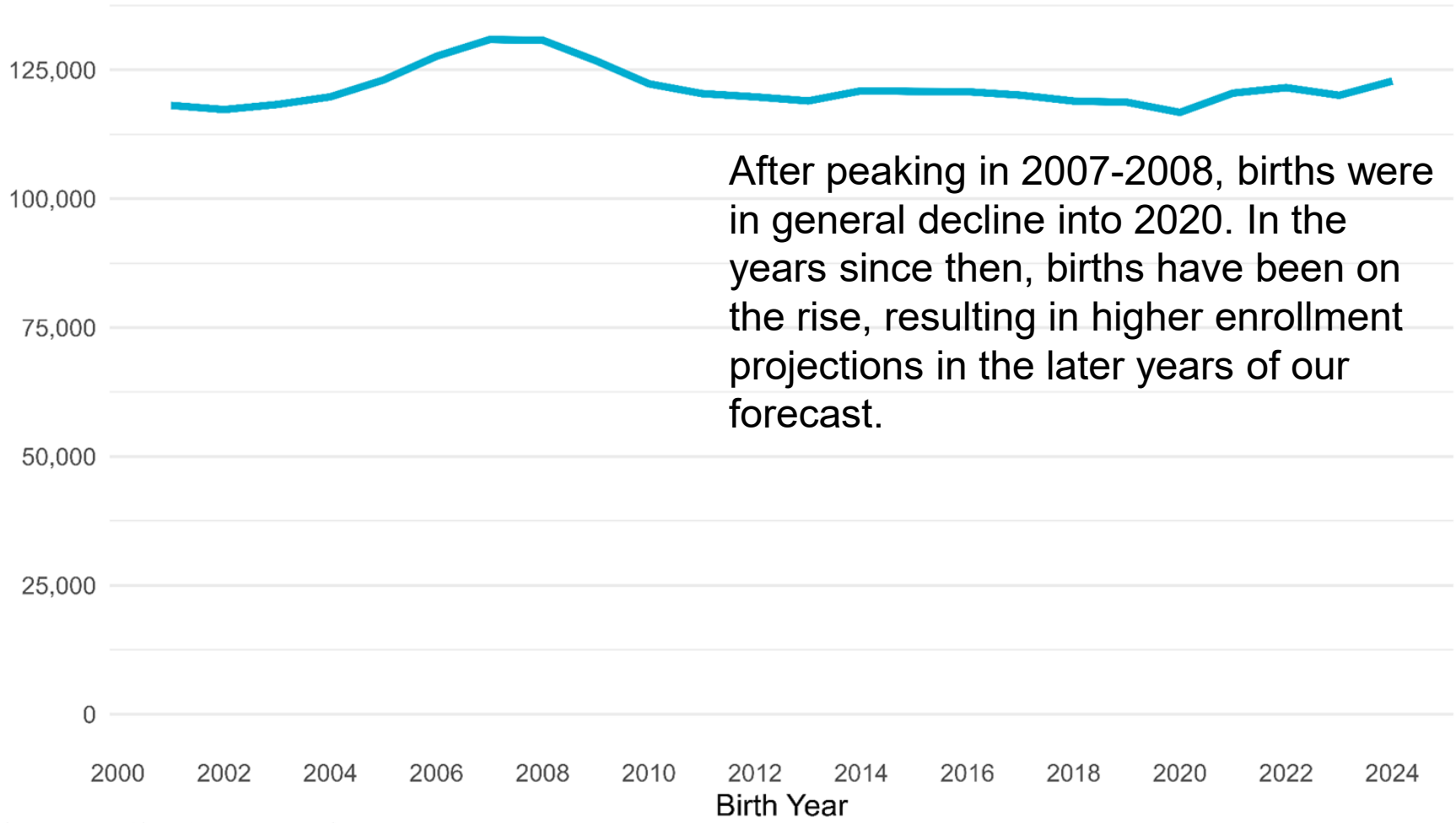
Figure 13. Percent of Population Ages 5-17 Enrolled in Any School Type

School Year 2024-25



- Only select counties are at the extremes of over/underestimating populations,
- Most are within +/-10% of matching with the estimated population aged 5-17.

Figure 14. North Carolina Births: 2001 through 2024



After peaking in 2007-2008, births were in general decline into 2020. In the years since then, births have been on the rise, resulting in higher enrollment projections in the later years of our forecast.

2024 extrapolated from January through October Births