

North Carolina Enrollment Landscape

Analysis Summary for CSRB

September 2026

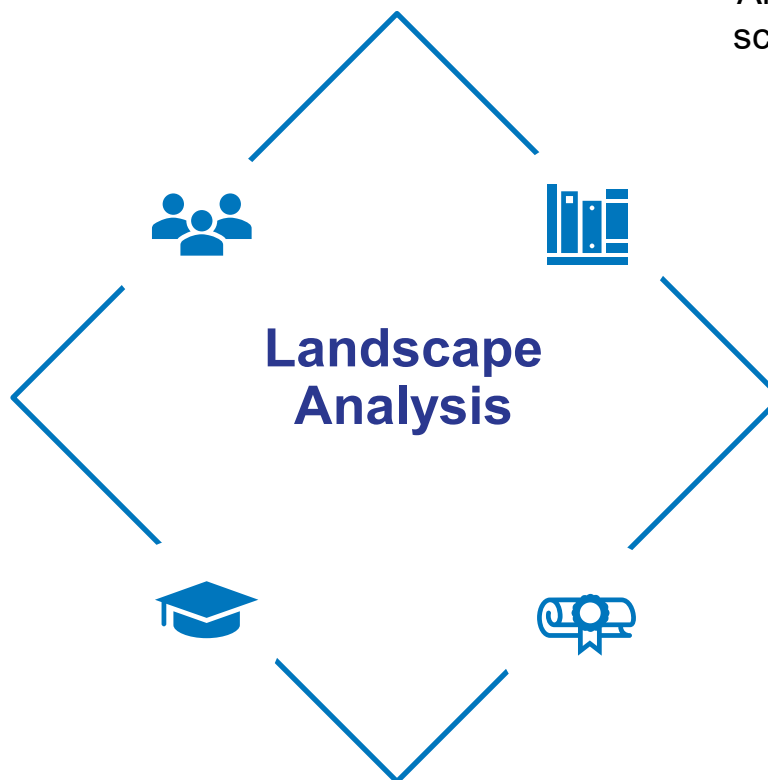
This analysis connects a series of quantitative categories at multiple altitudes to understand the relative enrollment landscape across the state

School-Age Populations

Analyzes the student-age population size, trend, and demographics, including connections to births and migration patterns

Enrollment & School Choice

Analyzes enrollment trends for districts, charter schools, private schools, and homeschooling to look state-wide and by county



Student Demographics

Analyzes changes in state-wide race/ethnicity over time and the composition for each county and district

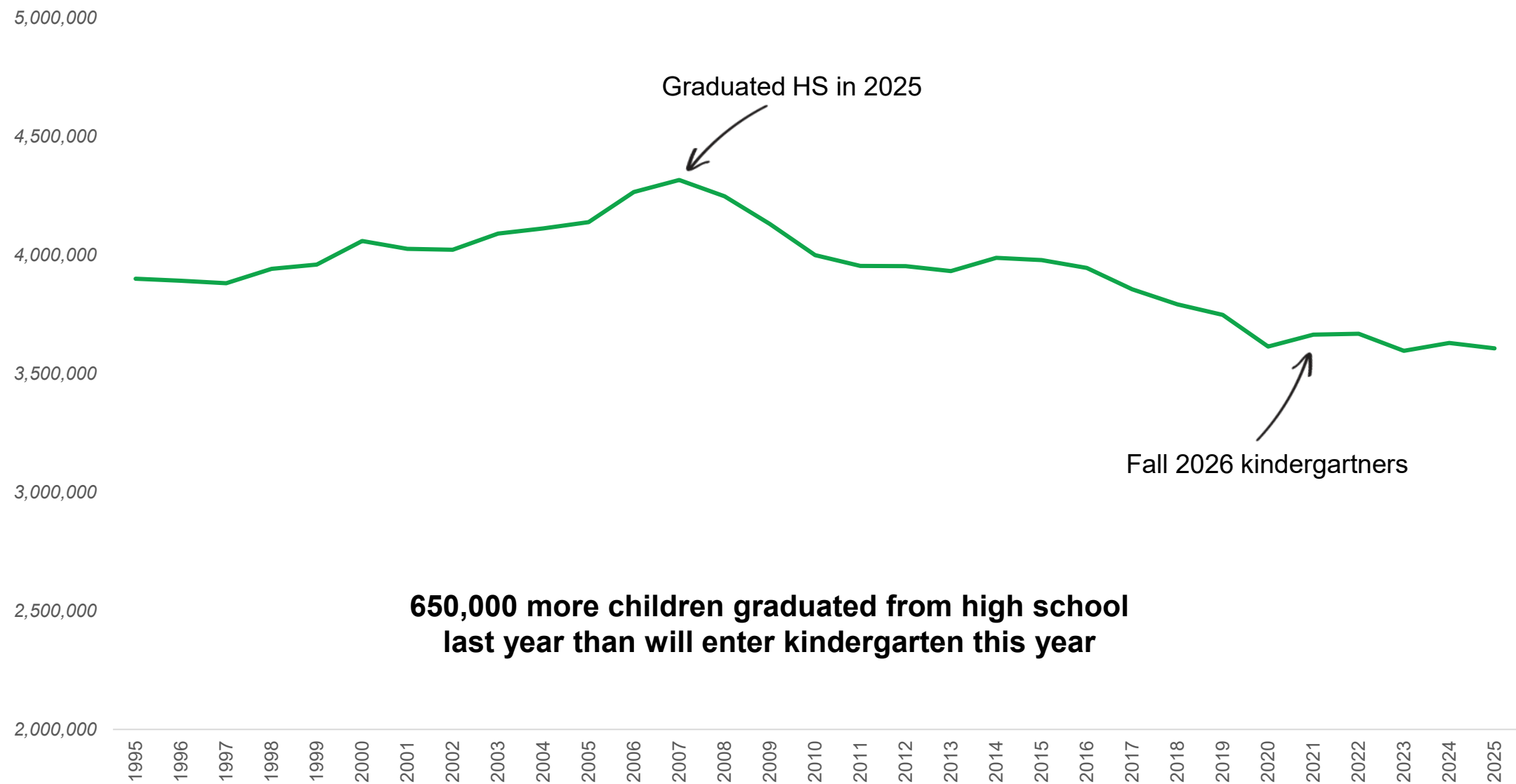
Academic Quality

Analyzes both academic achievement and student progress for students attending district schools along with report card scores for charter schools

Potential Uses of the Landscape Analysis

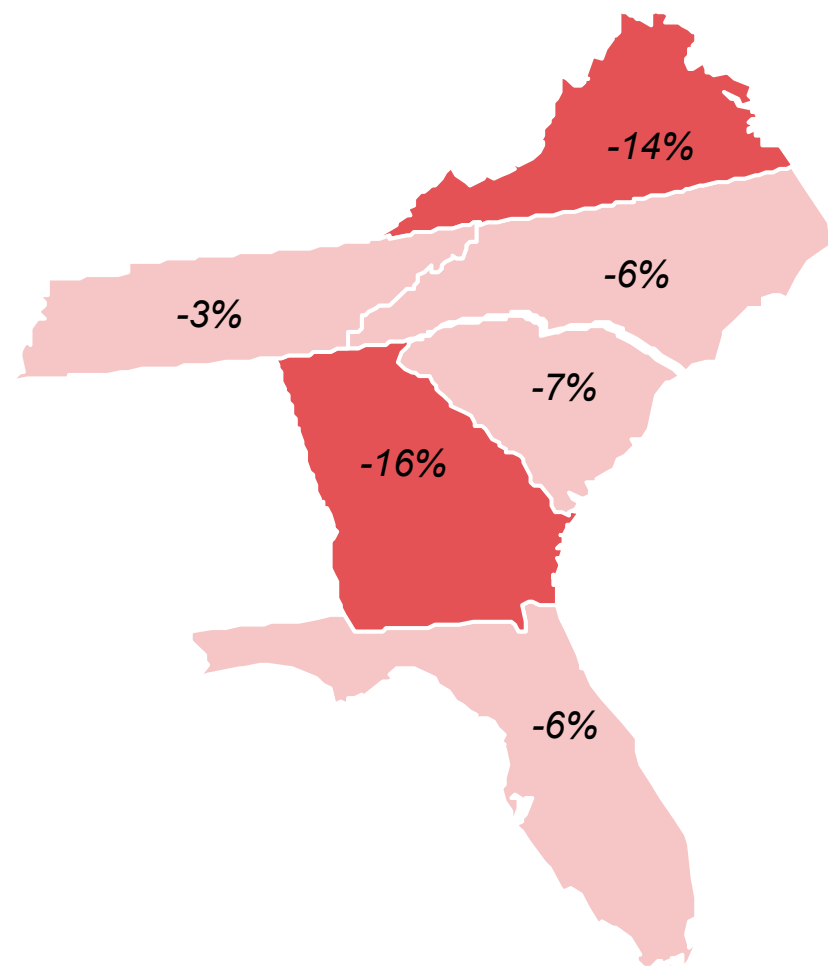
- Informed decision-making by the state authorizer, charter school office, and various support organizations.
- Guidance to school leaders (aspiring and current) about how to plan for changing demographic and enrollment conditions.
- Broader insights on a complex topic that is central to the sustainability and impact of public education in North Carolina.

Record-low birth rates are a primary driver of a smaller student-age population, leading to lower enrollment in many states. NC births are down only 6% compared to 16% nationally

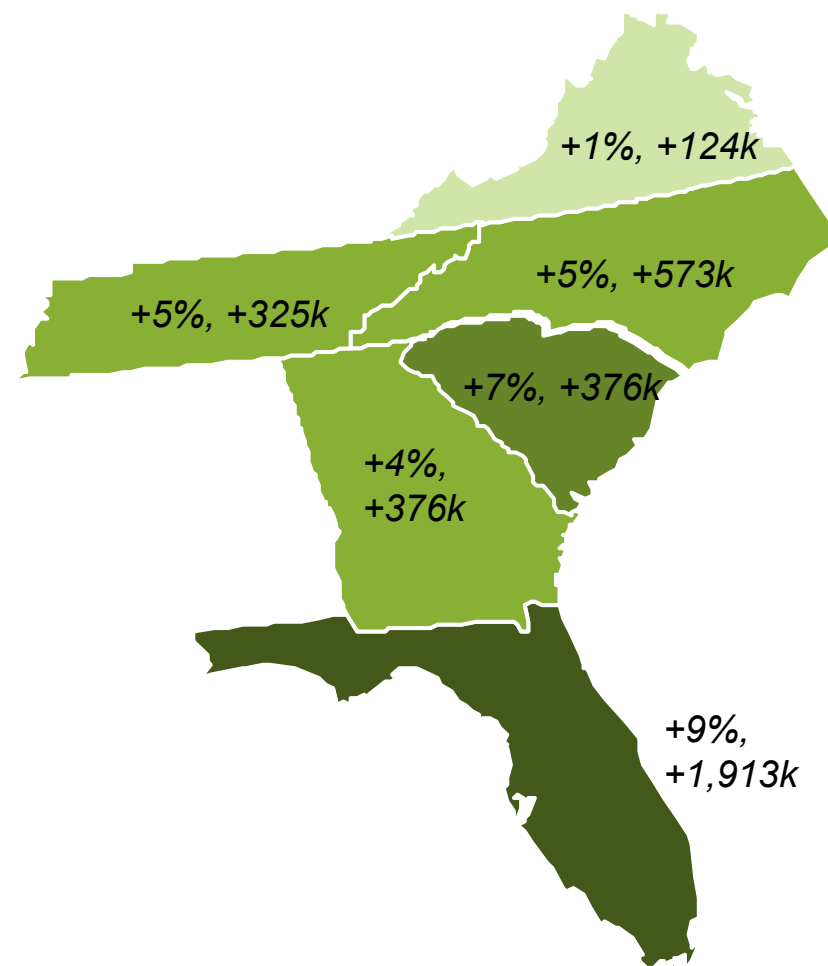


Compared with its southeastern regional peer states, North Carolina has had steadier births and a strong in-migration of residents

Change in births: 2007 to 2024

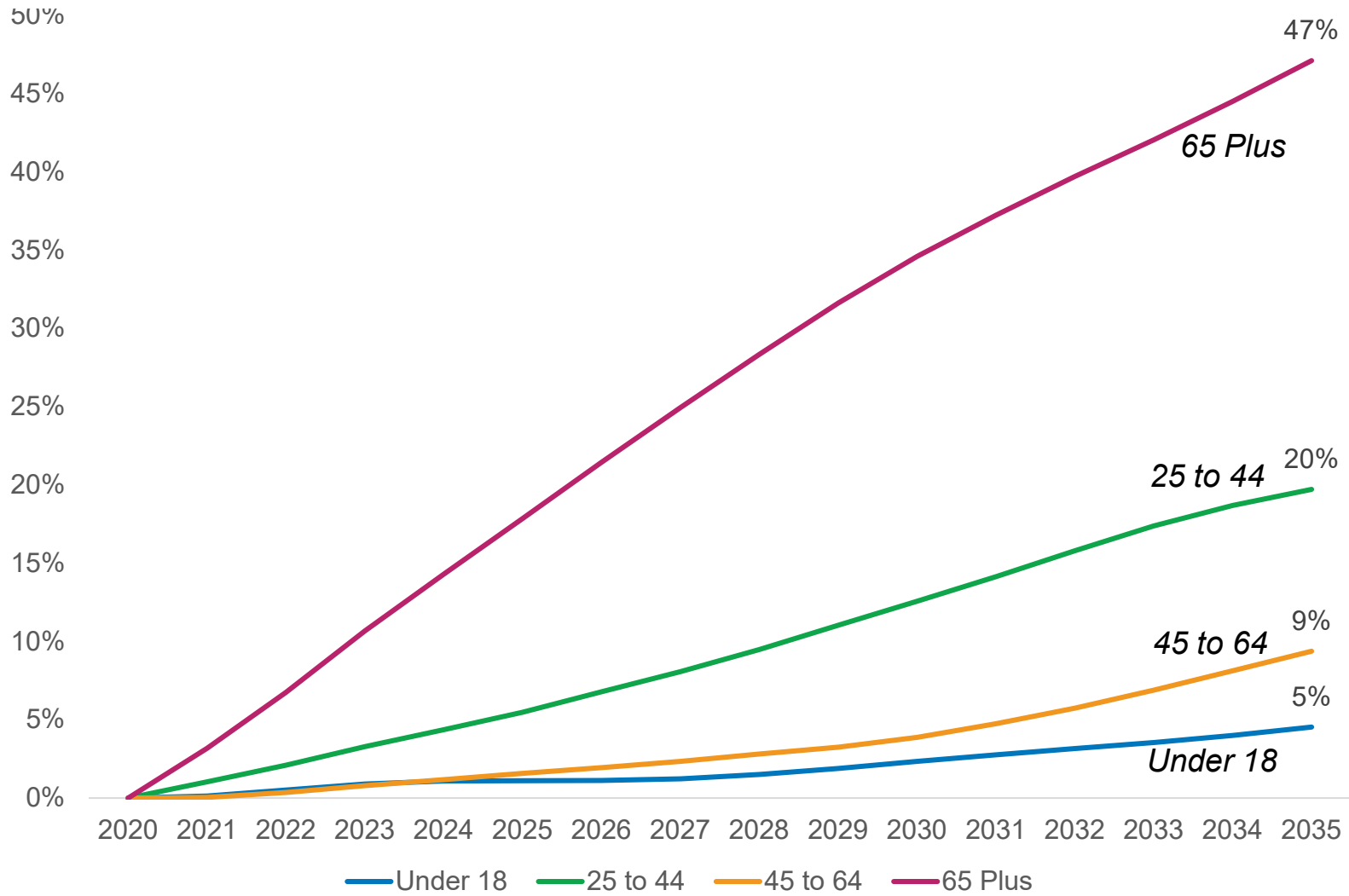


Net migration: 2020 to 2024



State demographers project minimal child population growth by 2035, representing 80k more children. The adult population is projected to increase at much faster rates

State-wide Population Projected Growth Versus 2020

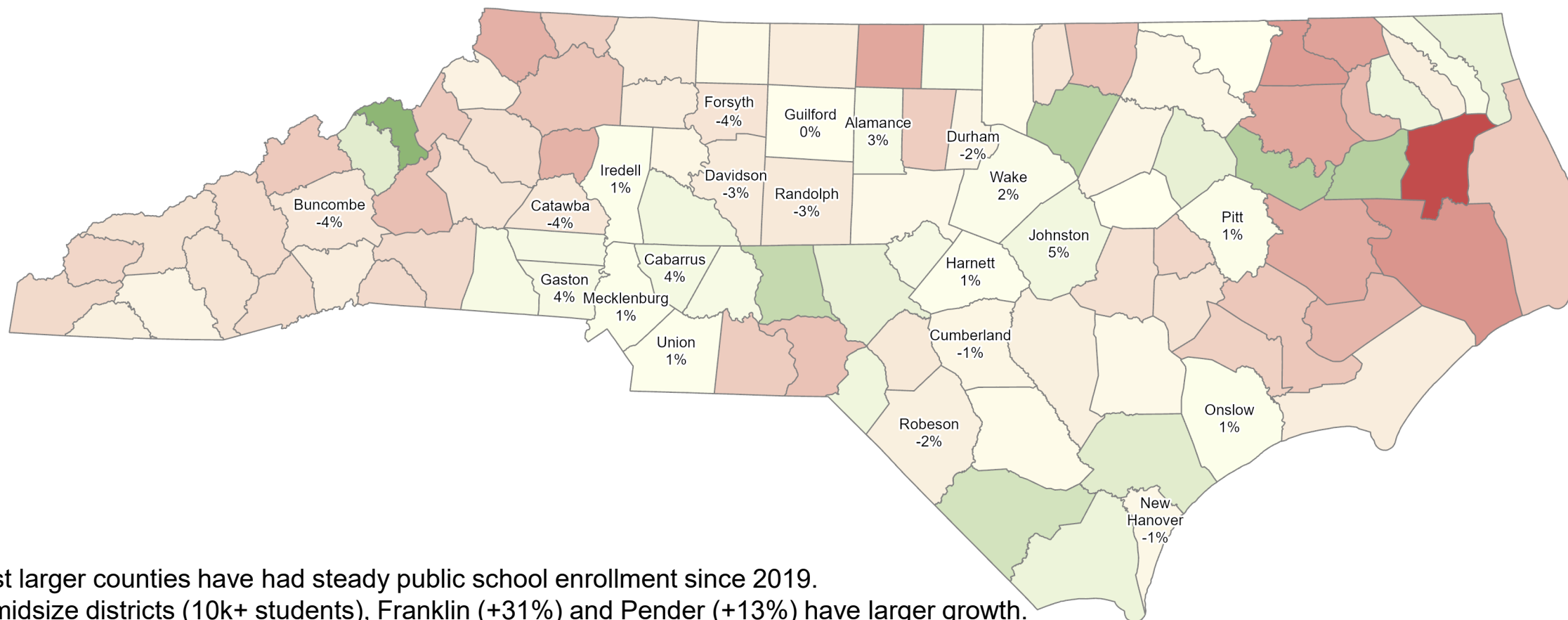


- North Carolina’s child population growth is the smallest of any age group, only 5% by 2035. This represents roughly 80,000 more children than in 2025.
- The 65-plus population is growing the most, though growth in the age 25 to 44 group can create future families.

County Insights

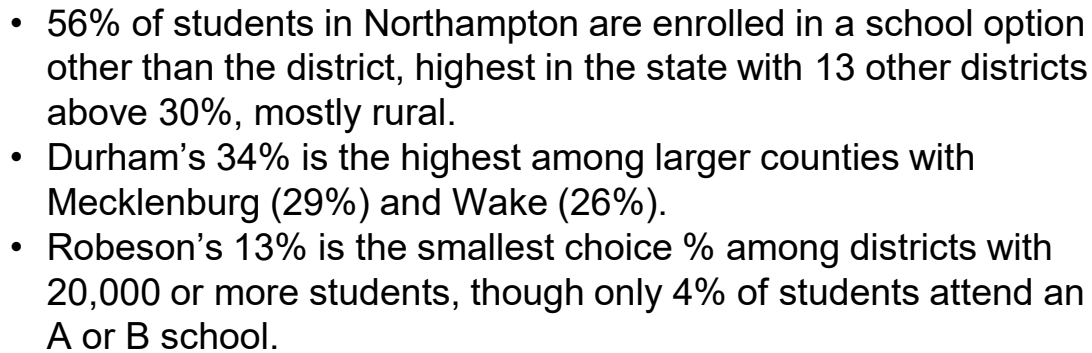
Since 2019, most large counties have had steady public school enrollment, while there is wider variability among smaller counties

2019-20 to 2024-25 change in public school enrollment (district + charter)



- Most larger counties have had steady public school enrollment since 2019.
- Of midsize districts (10k+ students), Franklin (+31%) and Pender (+13%) have larger growth.
- 32 counties have declines of at least 5%, many of which are smaller in size.

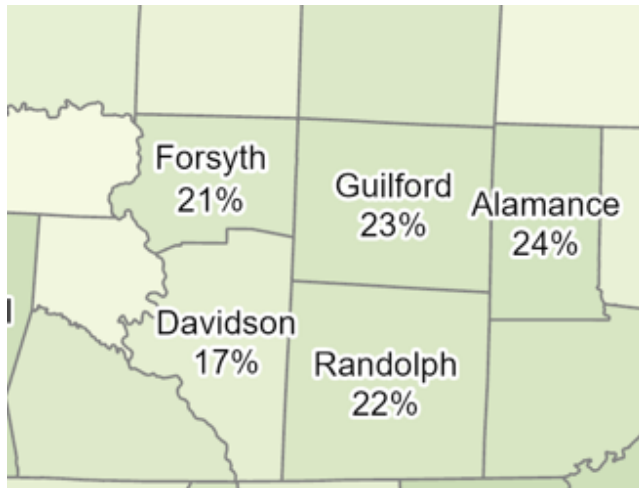
24-25 % of students enrolled in a charter, private, or home school



Sample Regional Insights

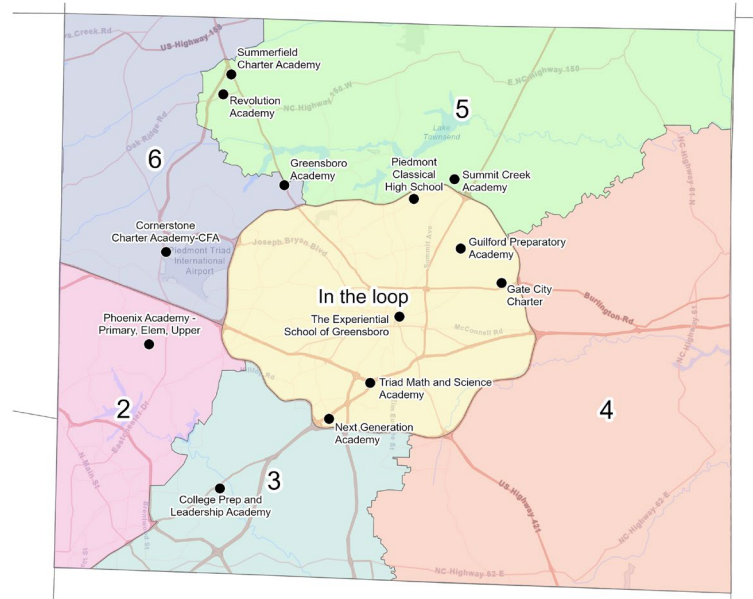
Understanding our largest markets at a regional level has various potential use cases, including marketing and enrollment, community partnerships, and school siting decisions

County Level



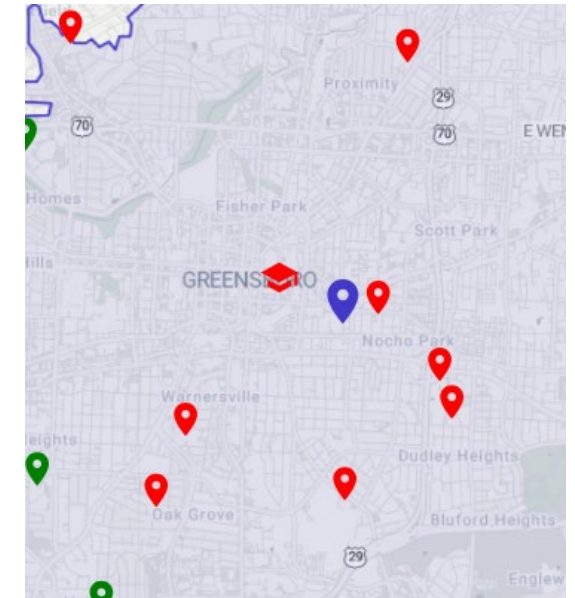
Analyzes the overall county or district across a wide range of metrics addressing population, enrollment, demographics, and academic quality to allow for comparisons across the state.

Regional Level



Analyzes areas within the largest counties by leveraging major geographic features like highways to understand enrollment, population, and access to quality at a regional level.

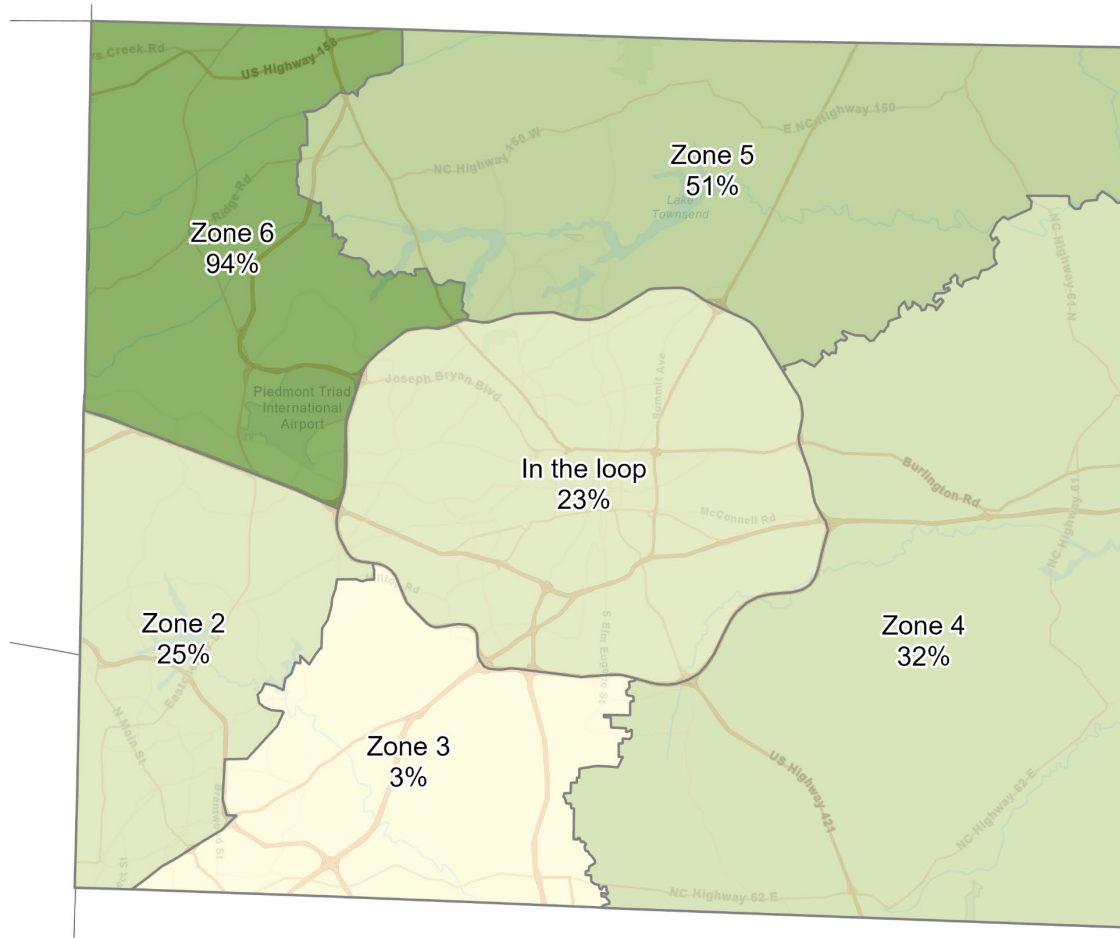
Site Level



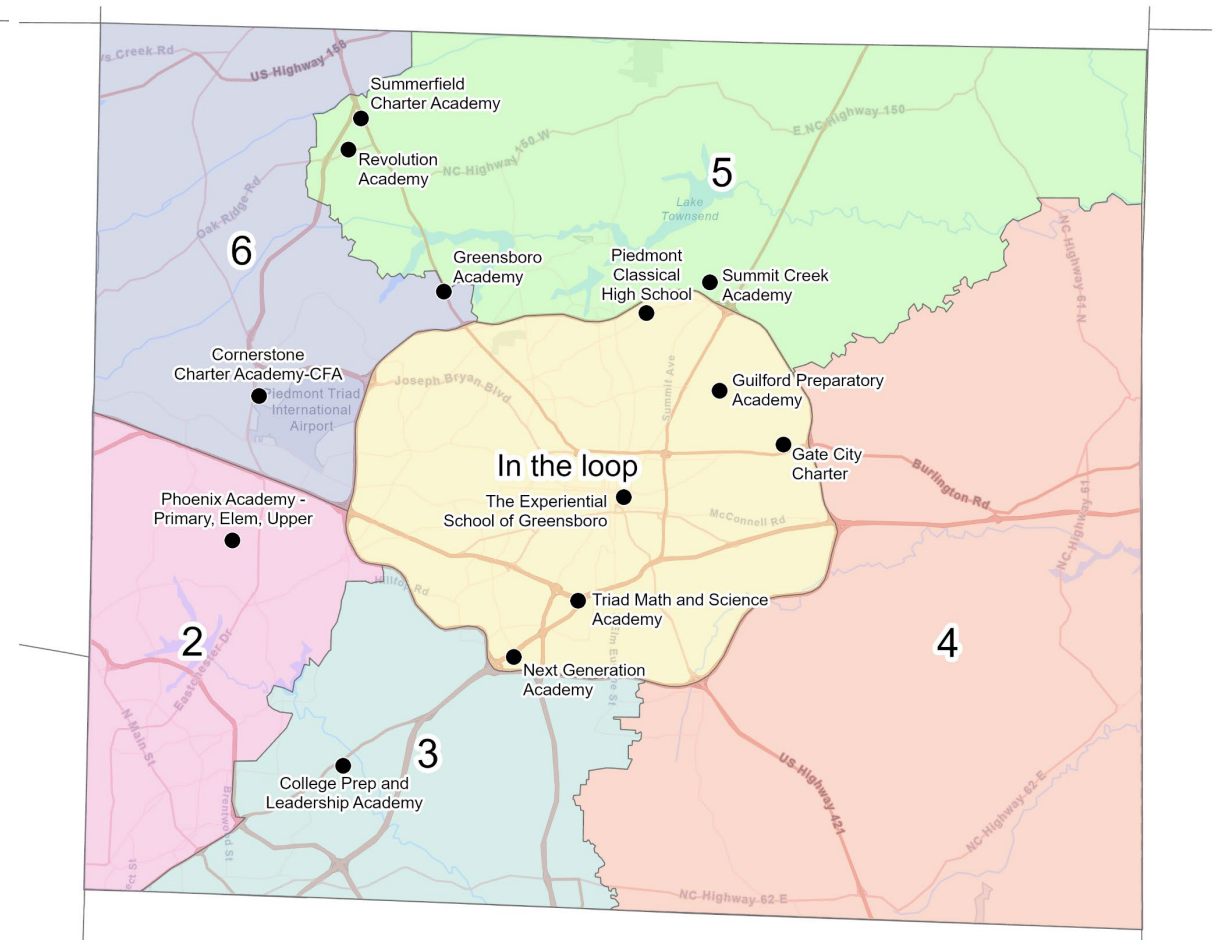
Education Data Collective's School Explorer can identify population and competitive dynamics at a **site level** using drive times to evaluate opportunities at a localized level.

Guilford Regional Access to High Quality Schools

% Students Enrolled in an A or B-rated school



% Students Enrolled in a charter school



Summary Observations

Art & Science

- Quantifying key dynamics like population shifts, school choice patterns, student demographics, and access to academic quality can build an understanding the environment in which schools are operating or seeking to open into.
- Marrying these with a qualitative understanding of how families are responding to schools can build a more comprehensive view of the long-term school opportunity.

Geographic Variance

- Overall, North Carolina has a relatively strong K-12 enrollment outlook because of the state's attractiveness to families, which has stabilized the child population.
- The local environment varies between rural, sub-urban, and urban areas across the state that make it important to understand local dynamics and how they may impact individual schools.

Bucking the Trend

- Putting it all together: by understanding a key set of area dynamics and their connection with specific schools, we can glean lessons learned of schools who have “bucked the trend” by launching and growing in an area with mixed population dynamics.
- This can help leaders understand how to successfully launch new sustainable charter schools.

North Carolina Enrollment Landscape Analysis

June 2026

About Eschbacher Consulting

Eschbacher Consulting supports long-term education planning with engagements anchored in practical, data-driven solutions that seek authentic stakeholder input to improve educational opportunities.

Eschbacher Consulting has conducted landscape analyses in more than 30 cities by focusing on the intersection of demography and school choice to guide decision makers in understanding the factors impacting enrollment and evaluating decisions to improve their long-term viability.

Prior to founding Eschbacher Consulting, Brian led the Planning & Enrollment Services teams as Executive Director for Denver Public Schools. His seven years at the district included national recognition by the Brookings Institution for being the top choice district in the United States.

Brian completed the Broad Residency in Urban Education and holds a master of business administration from Indiana University, and a bachelor of science from Pennsylvania State University. Prior to working in education, Brian worked in management consulting, most recently with Deloitte Consulting.



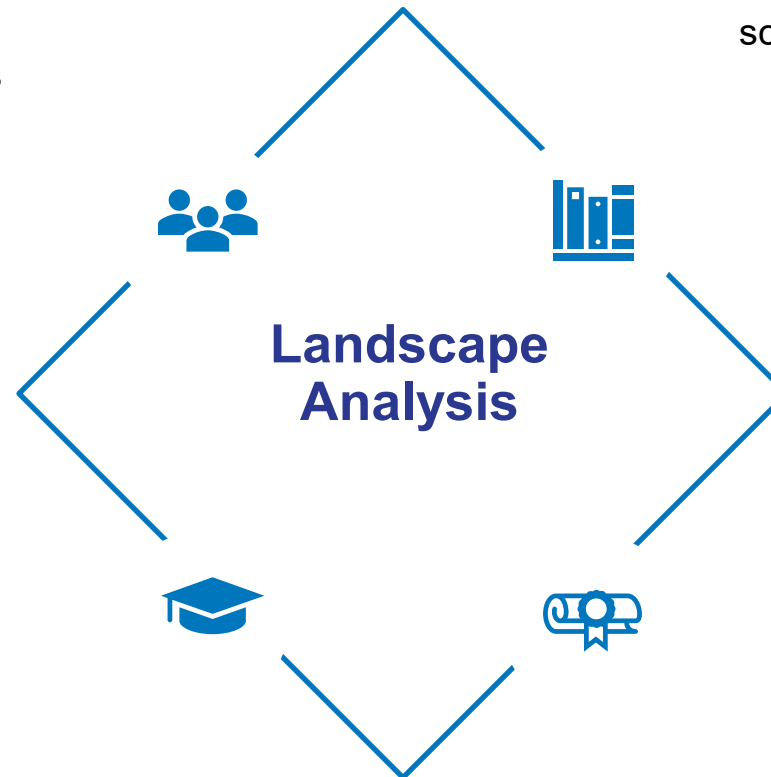
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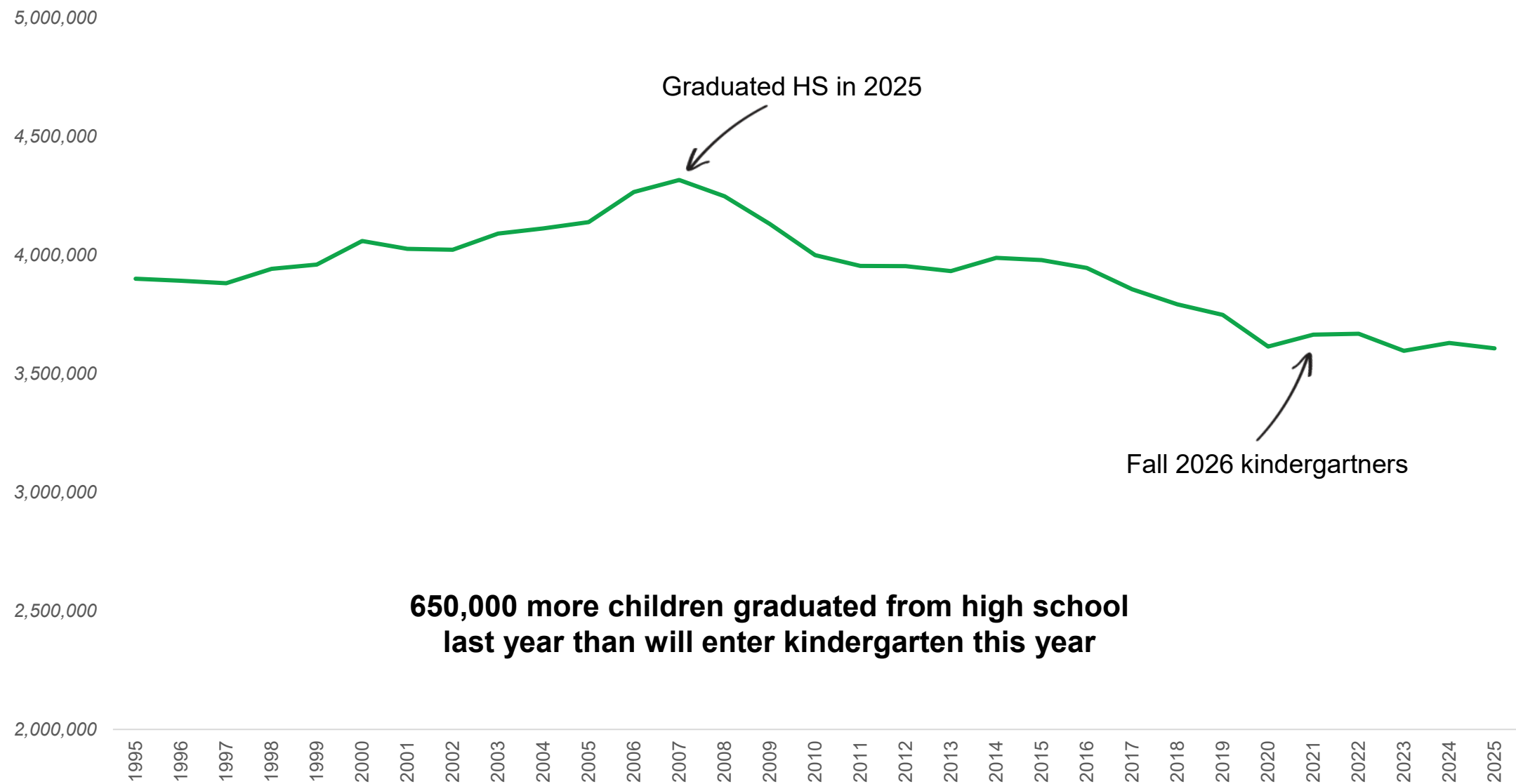
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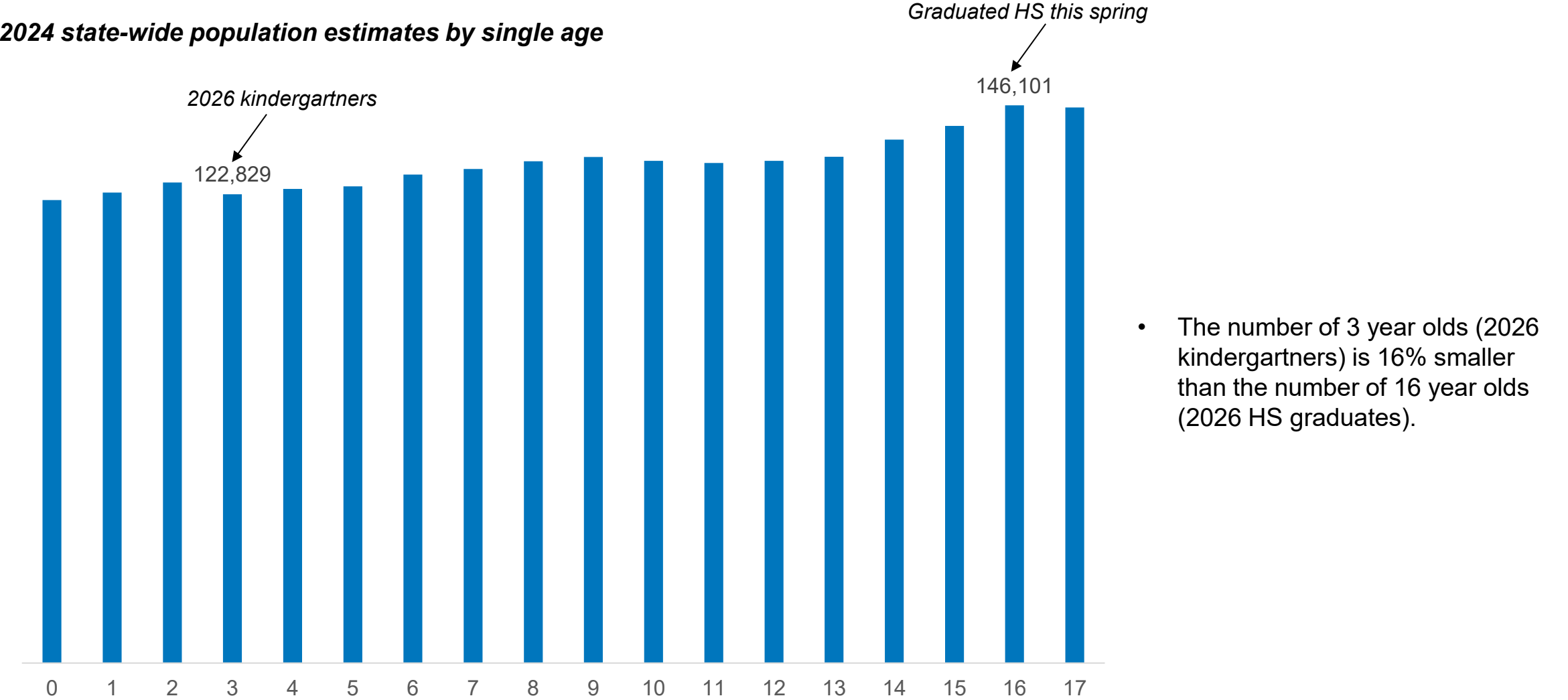
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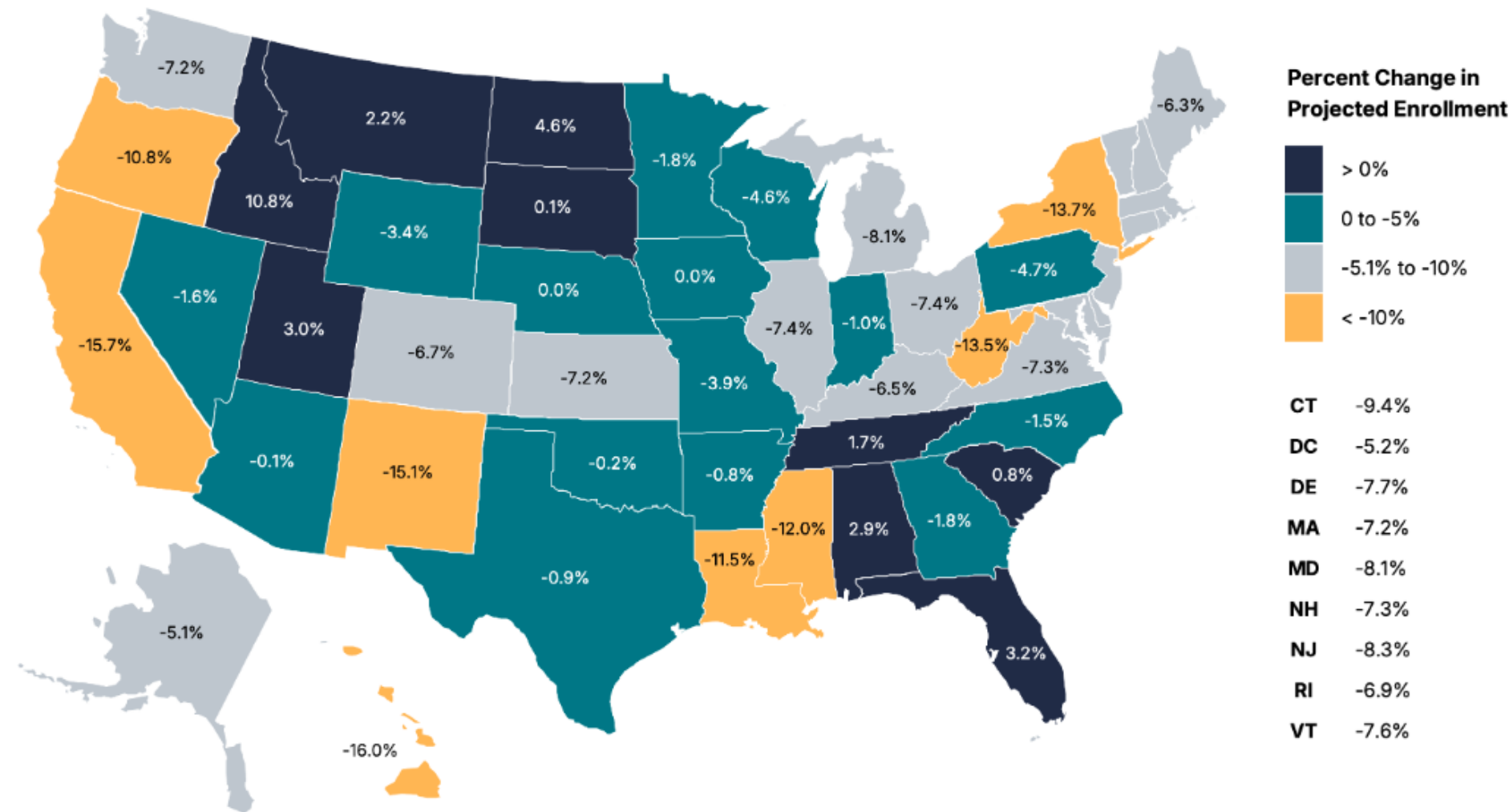


Translating births to single age population estimates suggests declines in the number of children entering K-12 versus those graduating



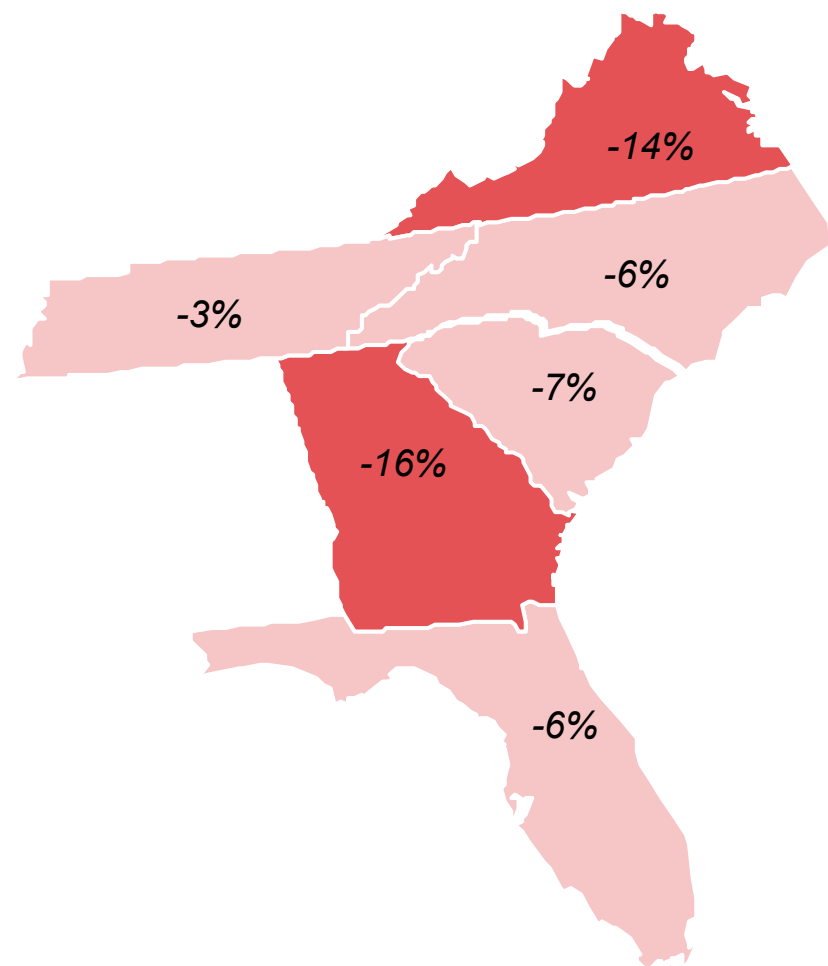
Changing public school enrollment will impact states differently, with only a handful still growing while many others decline

Change in K-12 enrollment: 2021-22 through 2030-31

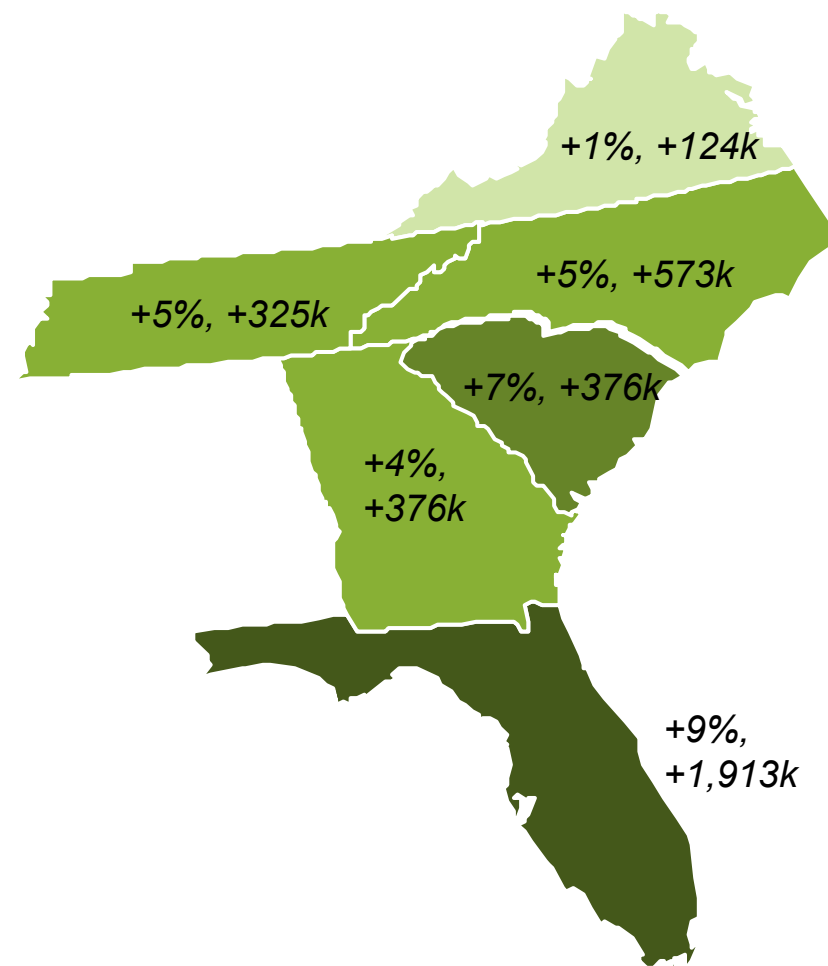


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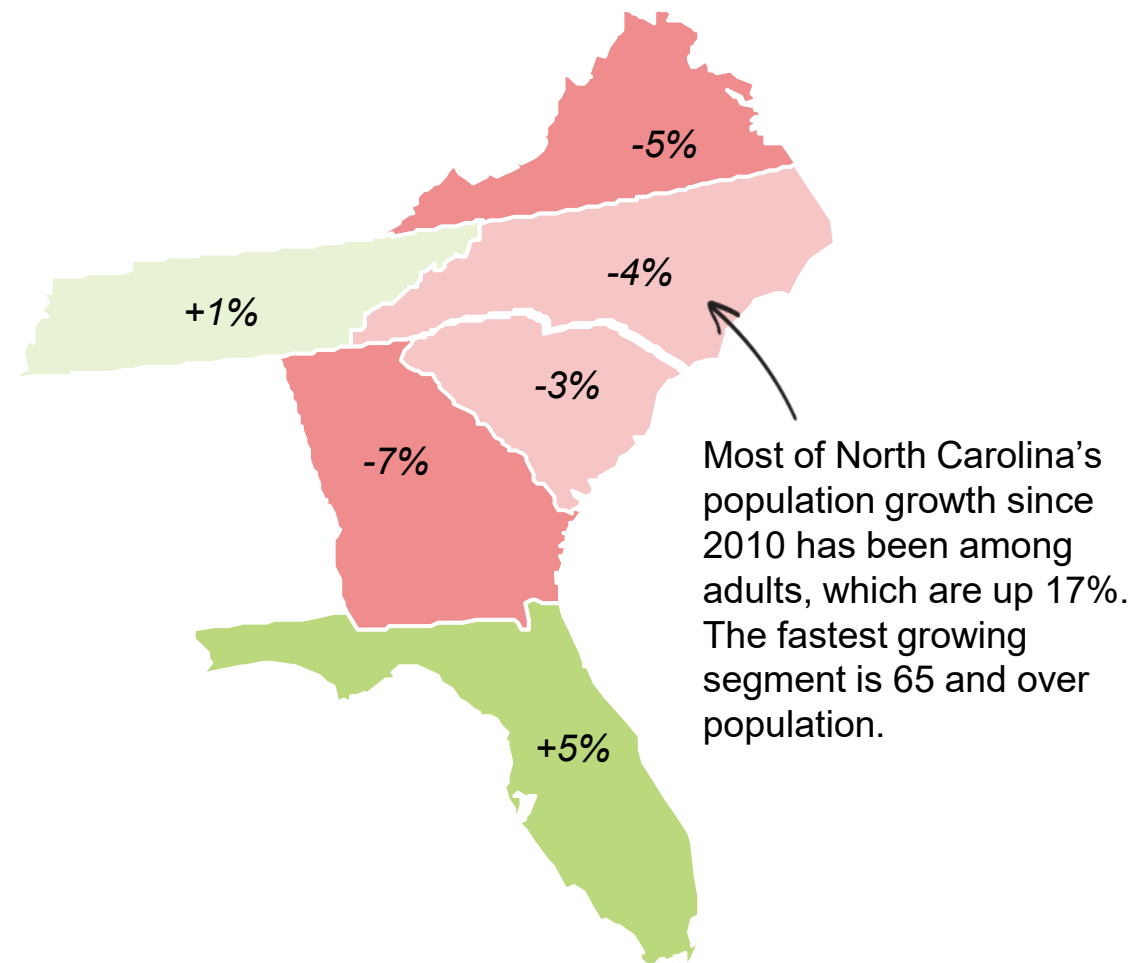


Net migration: 2020 to 2024

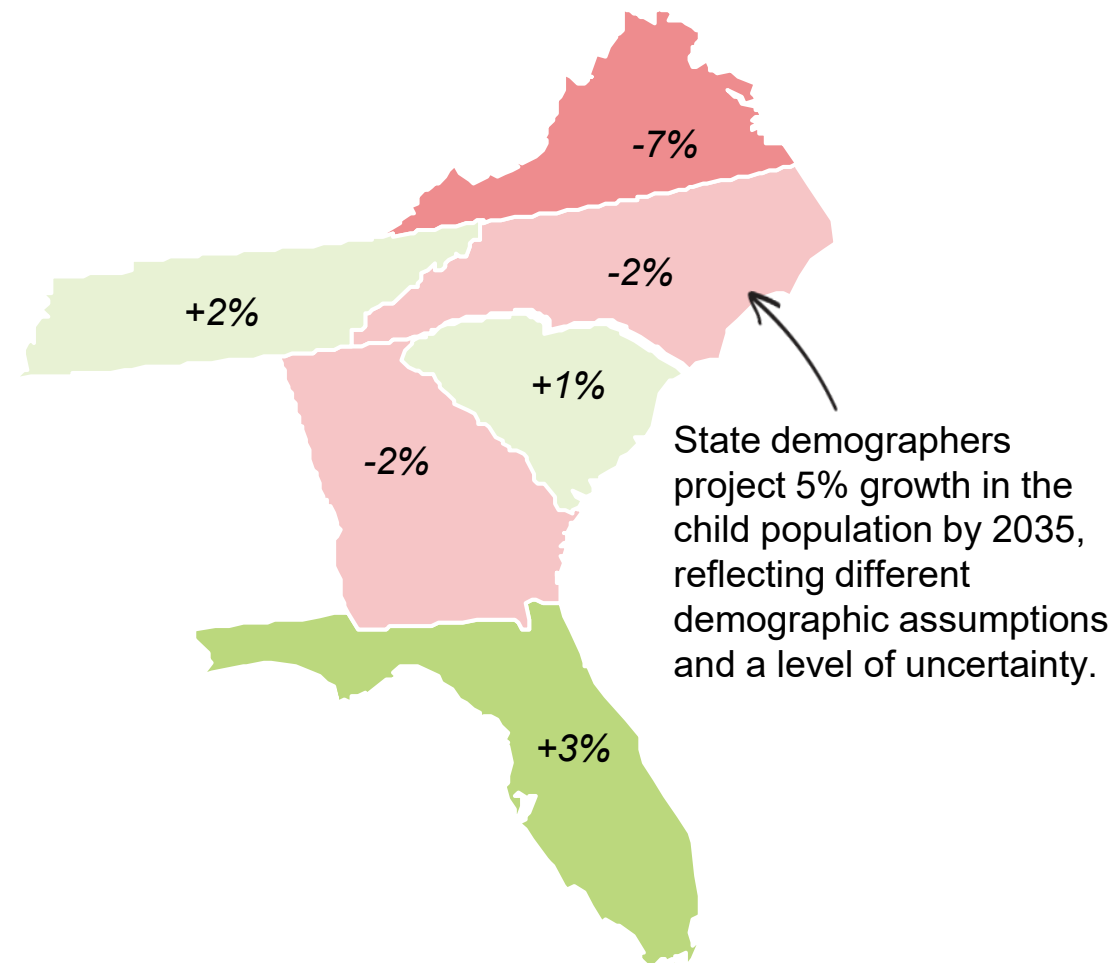


Many southeastern states now have fewer future school-age children than in the past, a key factor contributing to future public school enrollment projections

Change in under 5 population: 2010 to 2023

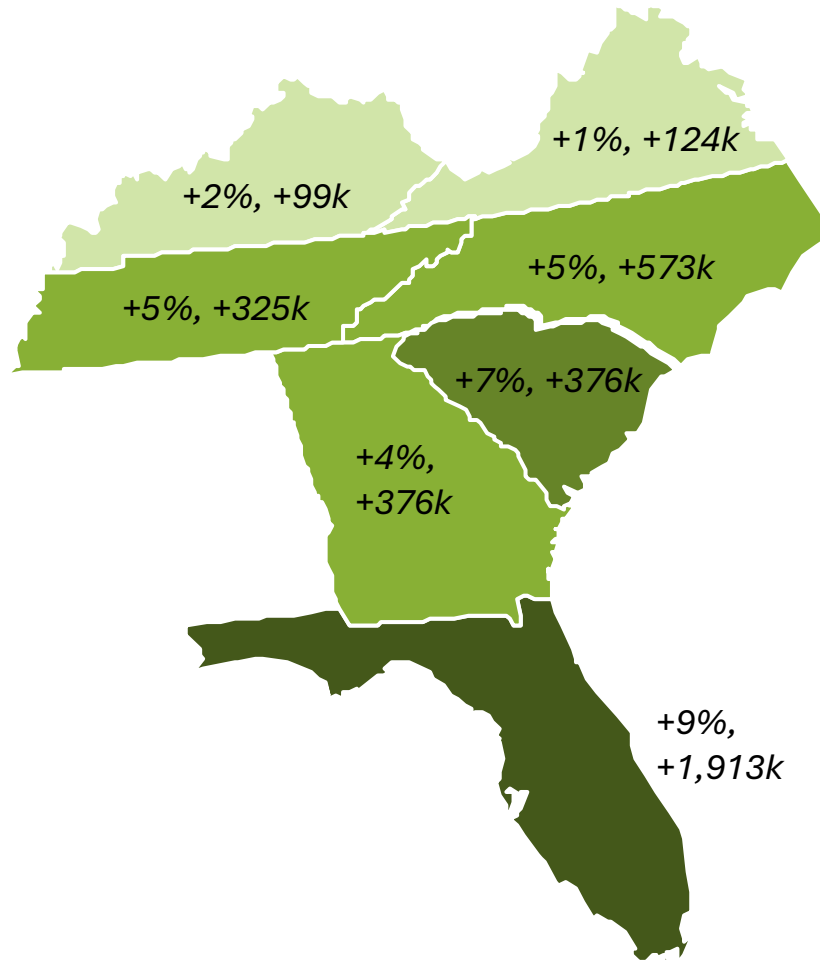


Projected public school enrollment change: 2019 to 2031



Since 2020, North Carolina has experienced continued growth from migration, which is critical to their growth given minimal natural population growth

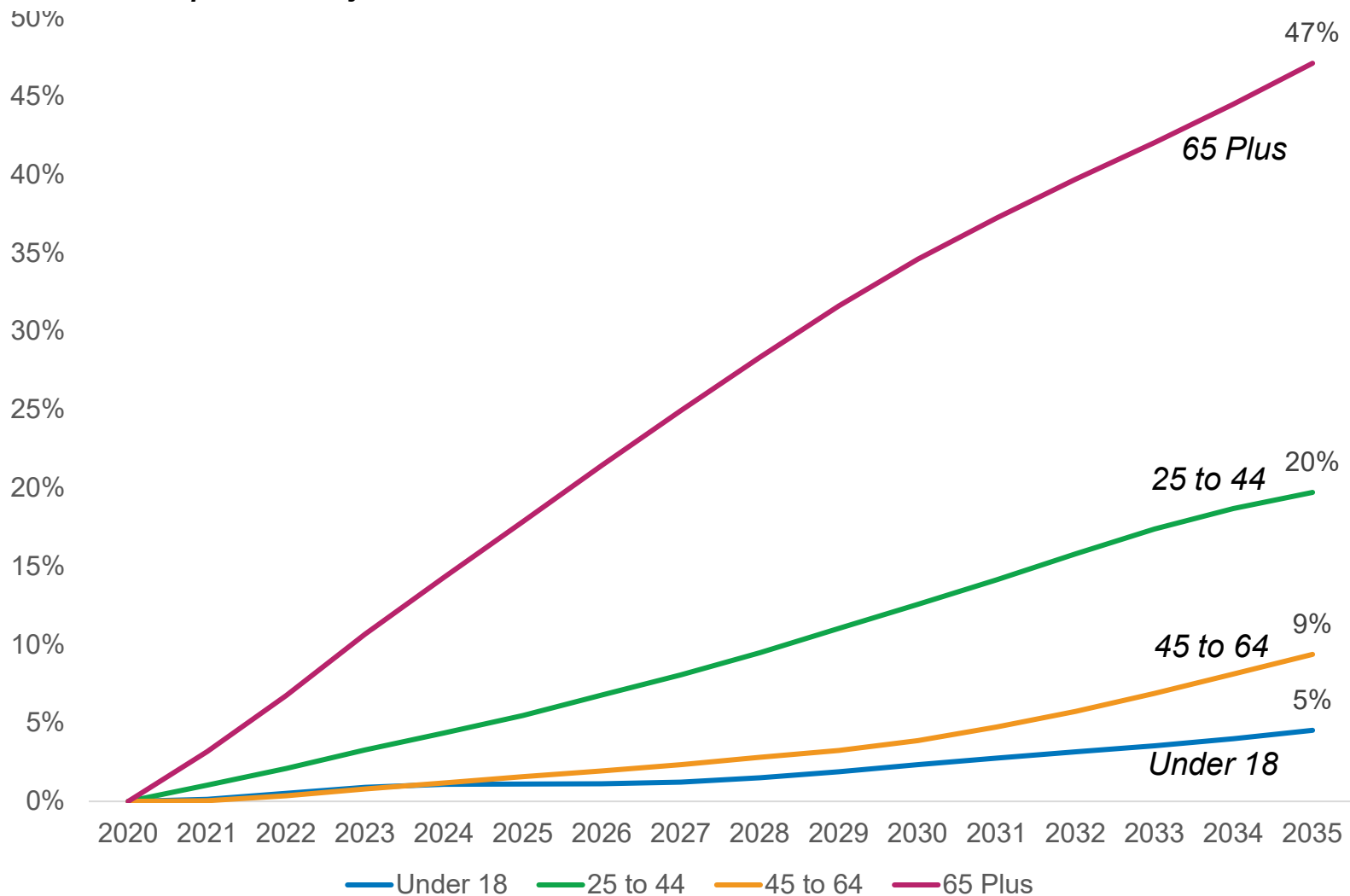
Net migration: 2020 to 2024



- 95% (573,000) of North Carolina's population growth since 2020 is from migration, both domestic and international.
 - 68% of migration is from within the US while 32% is from abroad.
- North Carolina benefits from multiple generations moving to the state, from Gen Z (18-24), who are more likely to have future children, and also older generations like Gen X or Baby Boomers.
- The broader southeastern US is attractive overall, with 4%+ gains in most areas compared to minimal growth in the northeast.

State demographers project minimal child population growth by 2035, representing 80k more children. The adult population is projected to increase at much faster rates

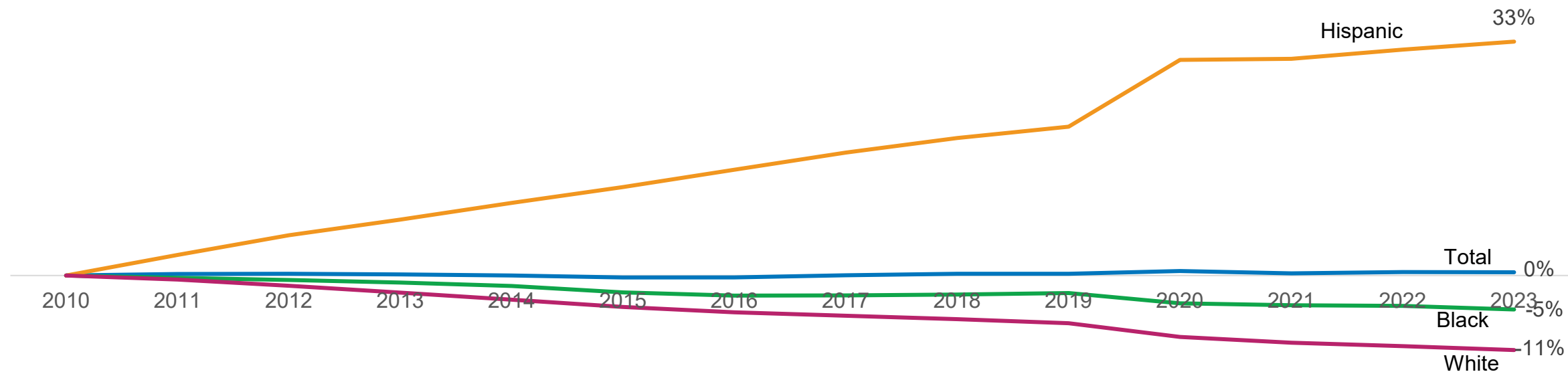
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- The 65-plus population is growing the most, though growth in the age 25 to 44 group can create future families.

Student-age populations are steady since 2010 with increases among Hispanic children and declines among White and Black child populations

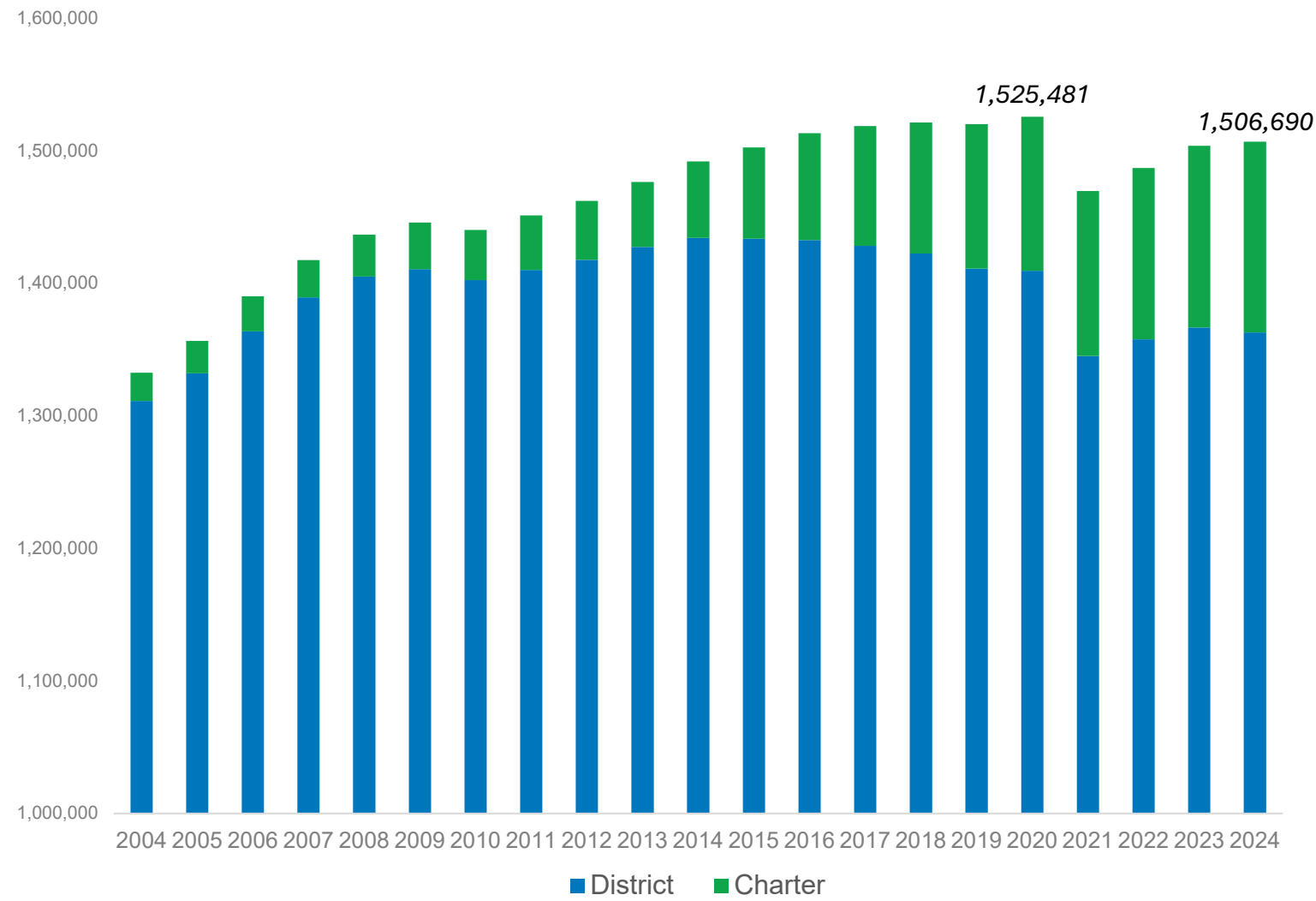
Cumulative change in 0-to-14 year old population versus 2010



- Overall, the child population is steady since 2010, though there are shifting racial demographics within the child population.
- Within the 0-to-14 age groups, the Hispanic population has increased 33% while both White and Black population's have decreased, though to different degrees. Later in this analysis, child population trends by race at the county level will be explored.

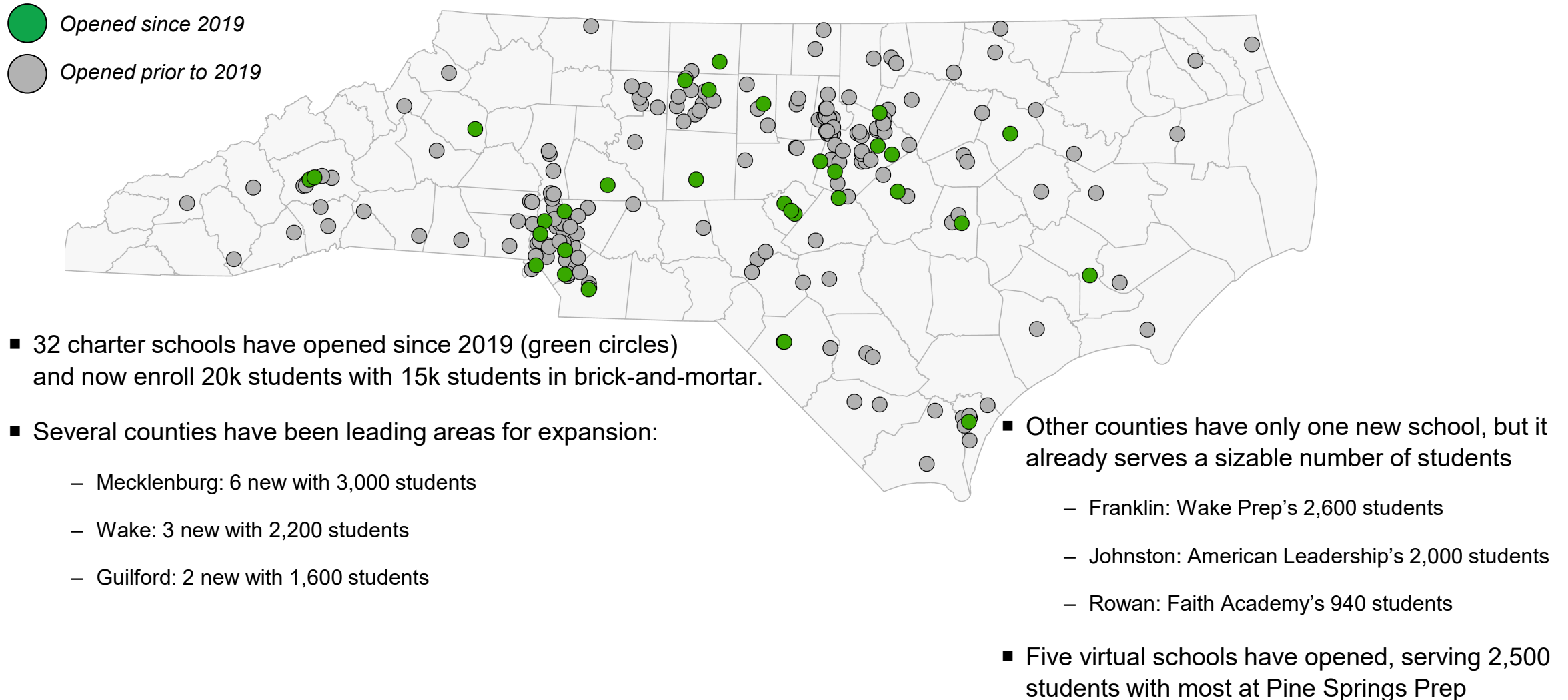
Charter school enrollment has steadily increased while overall public school enrollment stalled before COVID and has not reached pre-COVID levels since

Public School Enrollment (District + Charter)



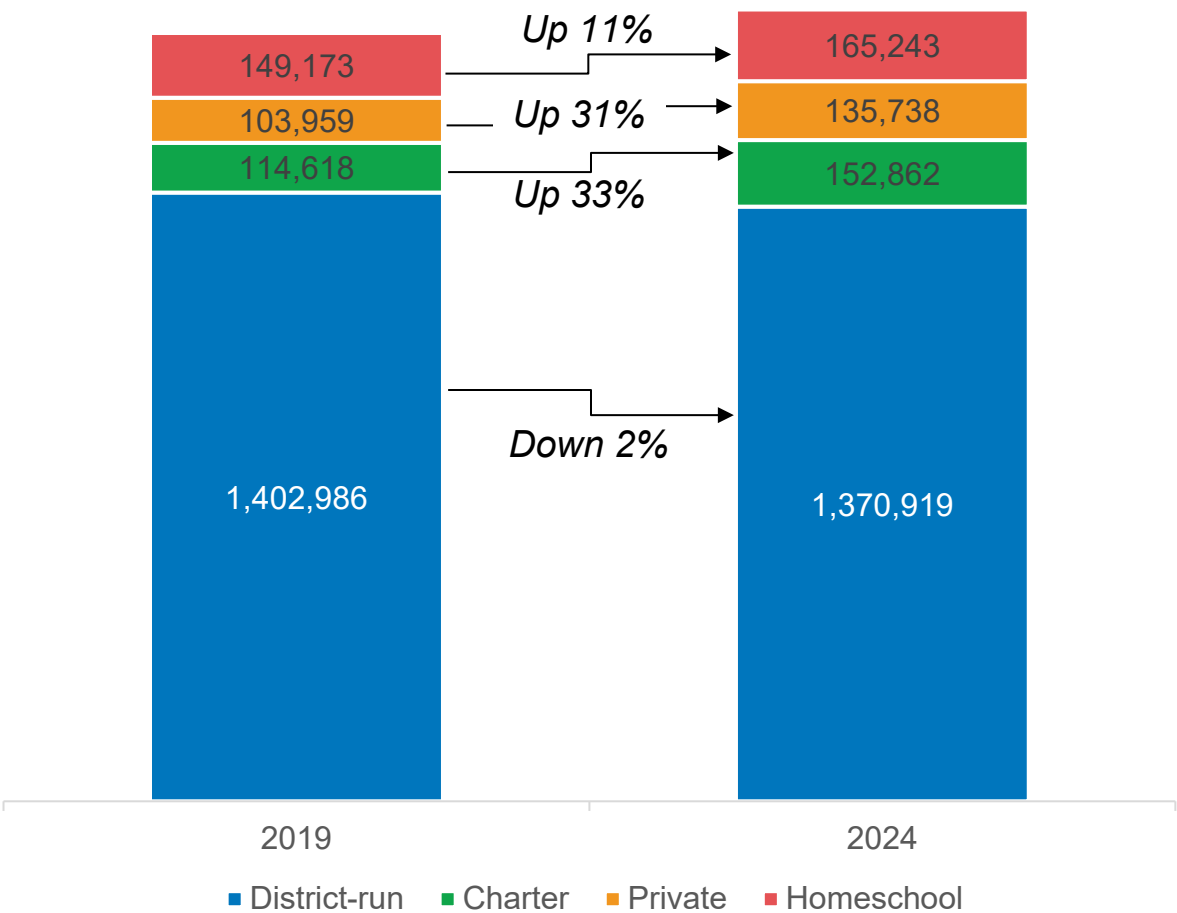
- **Overall**, public school enrollment was largely flat headed into COVID and is still a bit below the 2019-20 peak.
- **Charter schools** enroll 10% of public school students, steadily increasing over the last 2 decades. The next slide focuses on growth in the number of charter schools and their enrollment.
- 211 charter schools operated in 2024, up from 99 in 2010.

Charter locations and openings: 32 charter schools have opened across the state since 2019

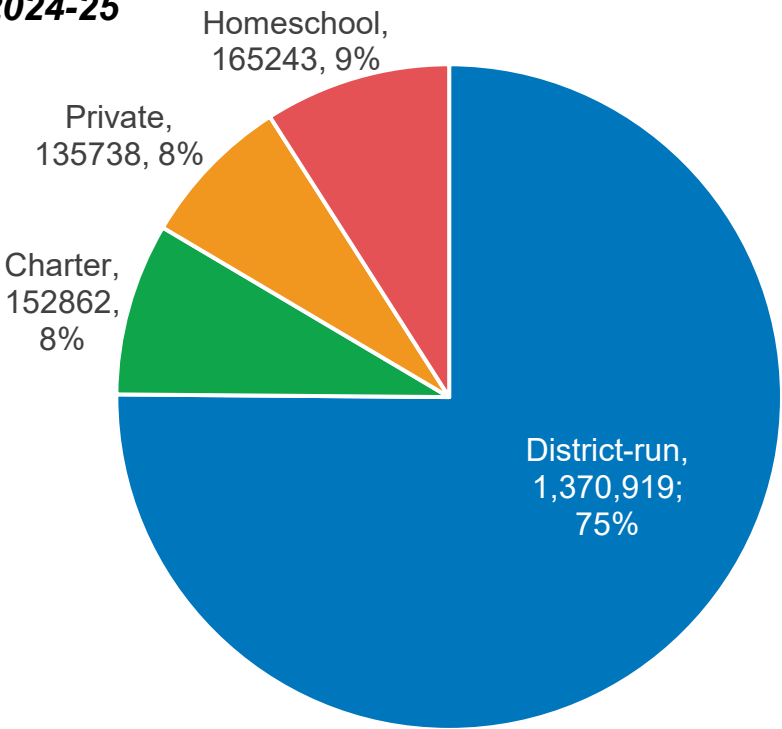


Districts still serve most students, though are experiencing enrollment declines while other school options have significantly increased enrollment since 2019

Enrollment by School Type



2024-25



- 100,000 more students are enrolled in an education setting compared to 2019, an increase of 6%.
- Districts still serve 75% of children, though it is down from 79% in 2019-20, while Homeschool, Charter, and Private each serve 8-9% of students.
- 88% of charter schools are within 10% of their 2019 enrollment, though 38 have closed since 2020.

Executive Summary: A set of tailwinds and headwinds are impacting the enrollment landscape and should continue to be monitored for future planning



Student Populations

Tailwinds: Favorable Conditions

- **In-migration** (domestic and intl.) across many age groups is largely offsetting declining births to **maintain child populations**.
- State demographers **forecast 5% child pop growth** by 2035

Headwinds: Concerning Conditions

- **Birth declines** require in-migration to sustain child pops and 30 counties have declined of 10% or more since 2015.
- Uncertainty with **federal immigration policy** is the single biggest variable to future student populations.



Enrollment

- Many counties have **steady public school enrollment** despite population and competitive headwinds.
- **88% of charter schools operating in 2026** have steady or growing enrollment.

- **Public school enrollment** dropped 19,000 students in 2025-26 with declines of at least 1,000 in Guilford, Winston Salem, Durham, Cumberland, and Charlotte-Mecklenburg.
- Kinder enrollment dropped 3k while larger cohorts graduate, reducing future K-12 enrollment levels.



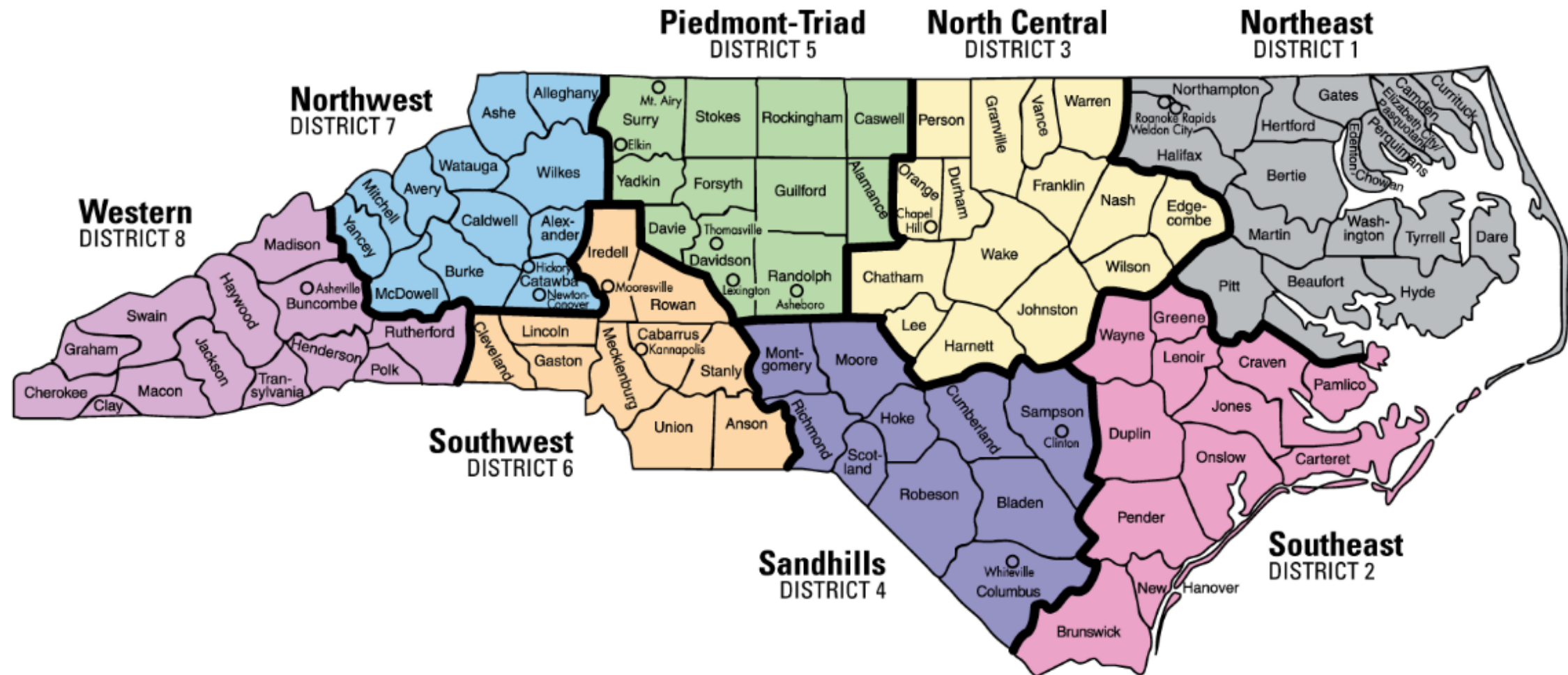
School Choice

- Families are increasingly exercising school choice among a range of public and private options, with **charter schools doubling enrollment** over the last decade.
- Charters are showing the ability to **buck the trend** and maintain enrollment while district enrollment declines.

- **Homeschool and private school enrollment increased**, creating added competition for public school options.
- **17 charters have closed** since 2020, many for enrollment.
- **Some new charters** are struggling to meet enrollment targets.

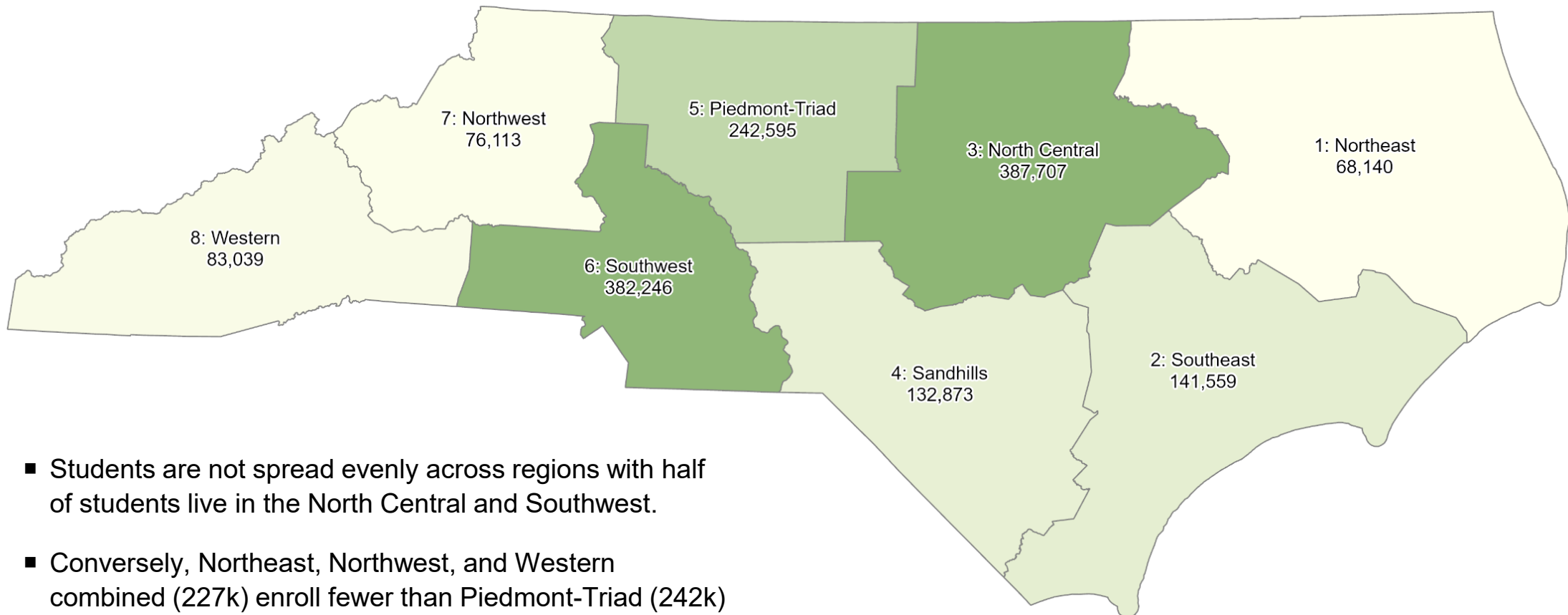
Regional Insights

The State Board of Education aligns the 100 counties to eight regional districts



Enrollment size varies significantly by region with nearly 400k students in each the North Central and Southwest while several other regions have fewer than 100k

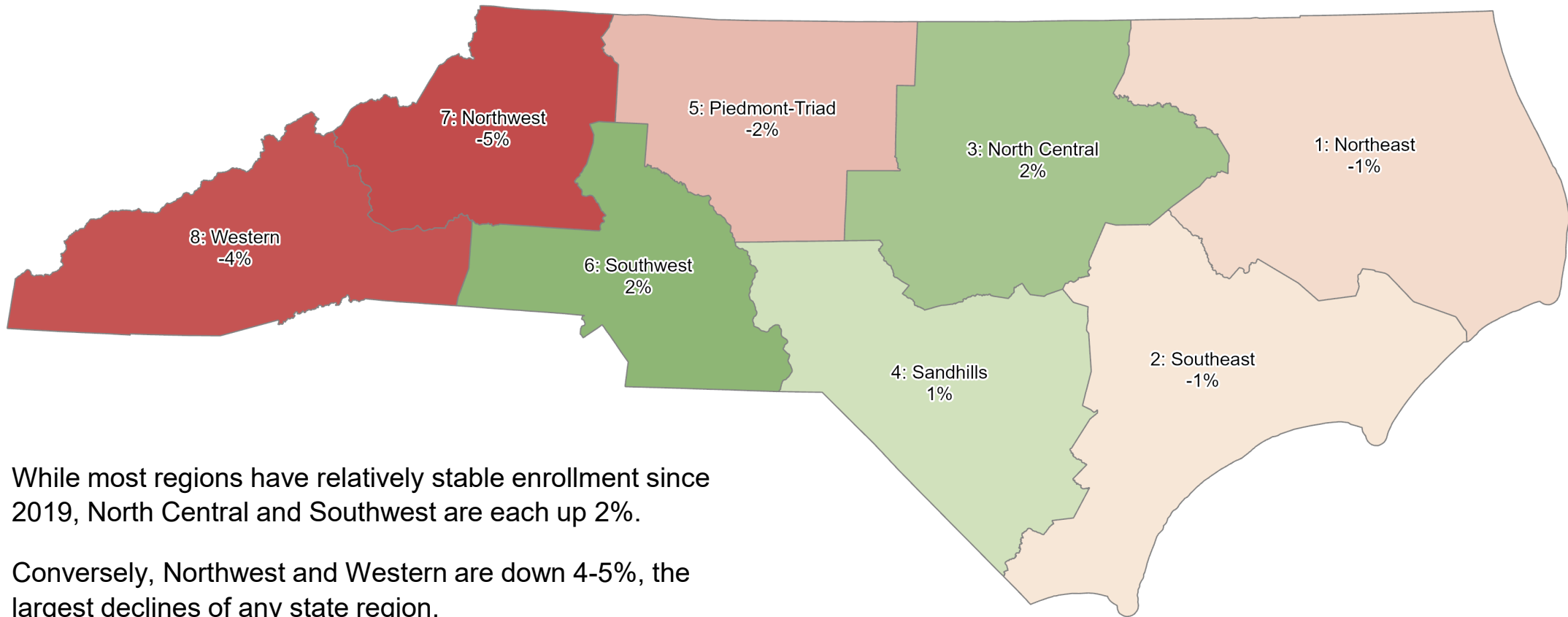
Enrollment Size



- Students are not spread evenly across regions with half of students live in the North Central and Southwest.
- Conversely, Northeast, Northwest, and Western combined (227k) enroll fewer than Piedmont-Triad (242k)

Enrollment growth varies since 2019 with western regions declining with the Southwest and North Central show continued growth

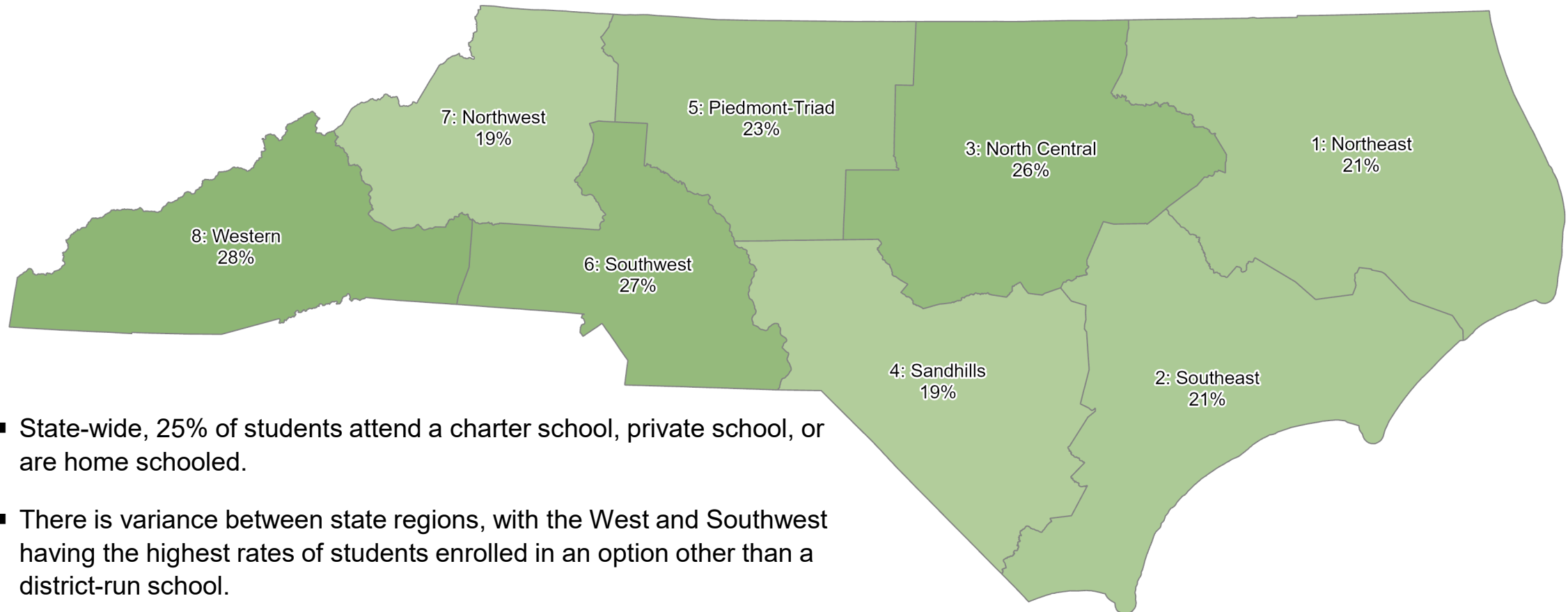
2019 to 2024 Change in Public School Enrollment



- While most regions have relatively stable enrollment since 2019, North Central and Southwest are each up 2%.
- Conversely, Northwest and Western are down 4-5%, the largest declines of any state region.

The extent to which students are participating in school choice varies between state region, though the method of how families are choosing varies by area and is explored at a county level

Charter, Private, and Home School Enrollment as % of Total Enrollment

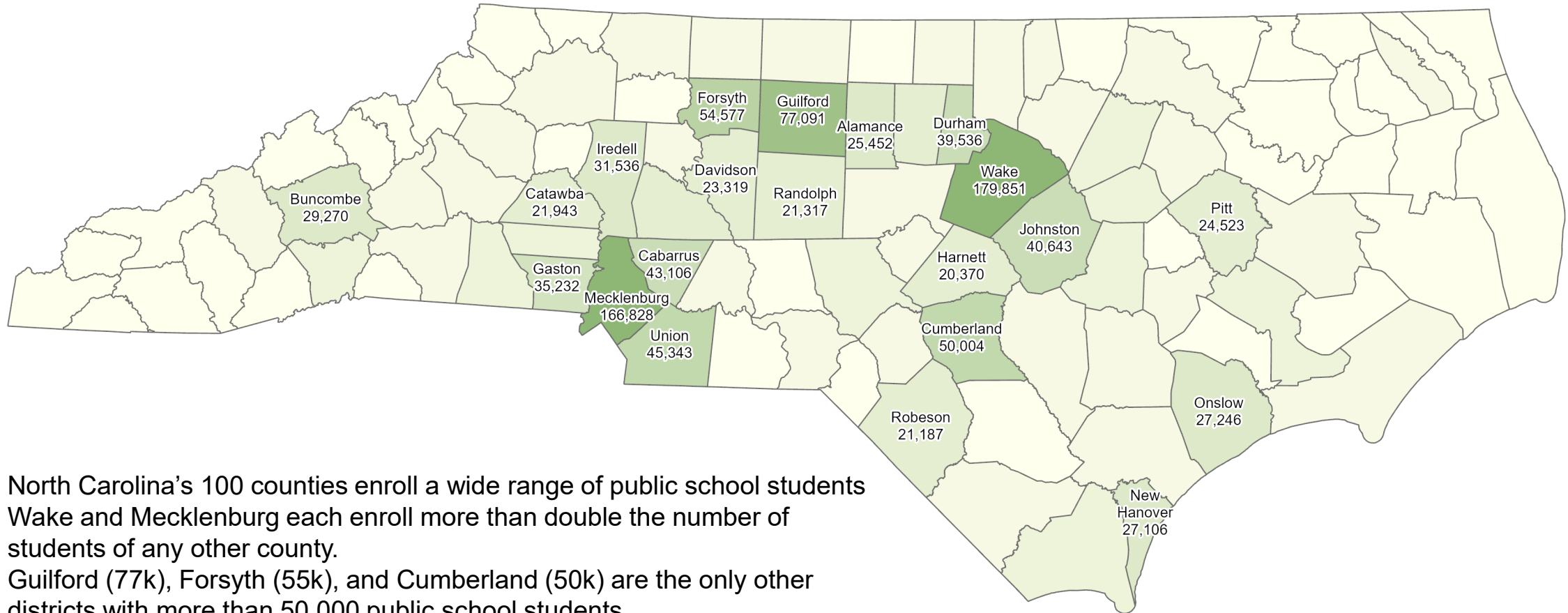


- State-wide, 25% of students attend a charter school, private school, or are home schooled.
- There is variance between state regions, with the West and Southwest having the highest rates of students enrolled in an option other than a district-run school.
- The lowest choice behavior is in the Sandhills and Northwest, with only 19% not attending a district school.

County Insights

Close to one quarter of all North Carolina students live in Wake or Mecklenburg Counties, which together are roughly the same size as the 68 smallest counties combined

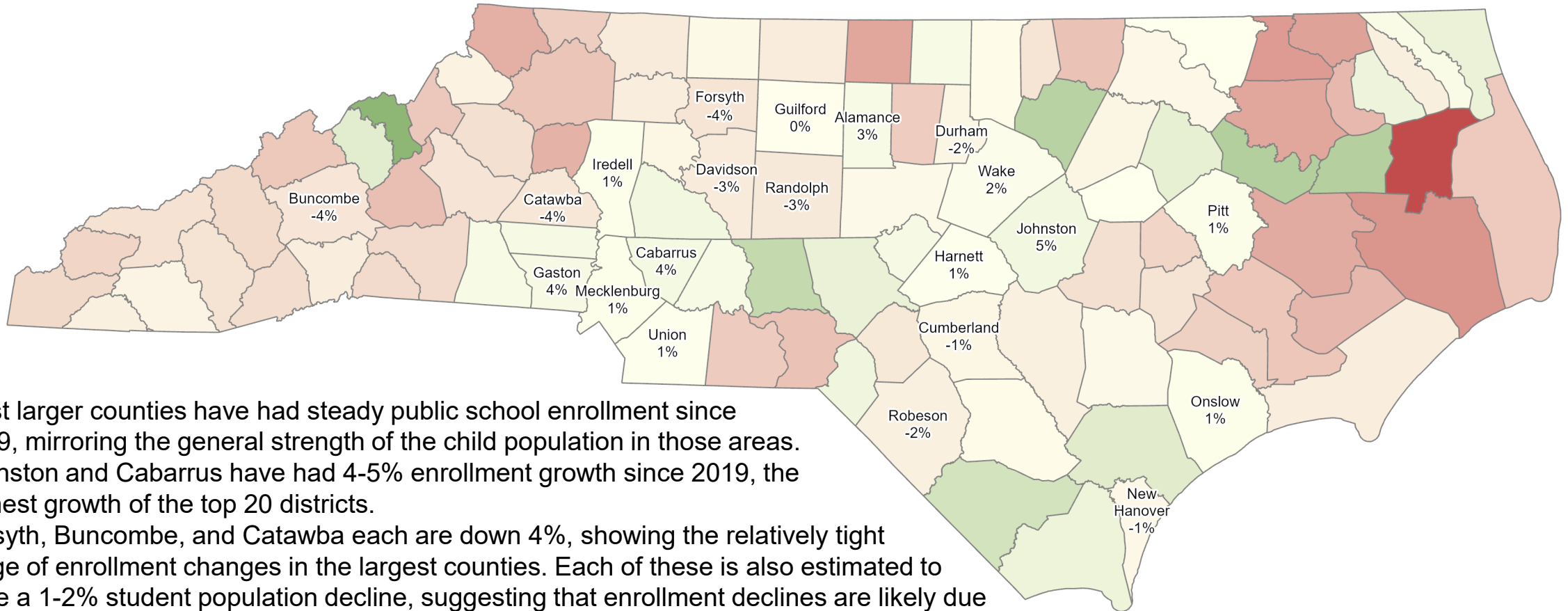
2024-25 public school enrollment (district and charter)



- North Carolina's 100 counties enroll a wide range of public school students
- Wake and Mecklenburg each enroll more than double the number of students of any other county.
- Guilford (77k), Forsyth (55k), and Cumberland (50k) are the only other districts with more than 50,000 public school students.

Since 2019, most large counties have had steady public school enrollment, while there is wider variability among smaller counties

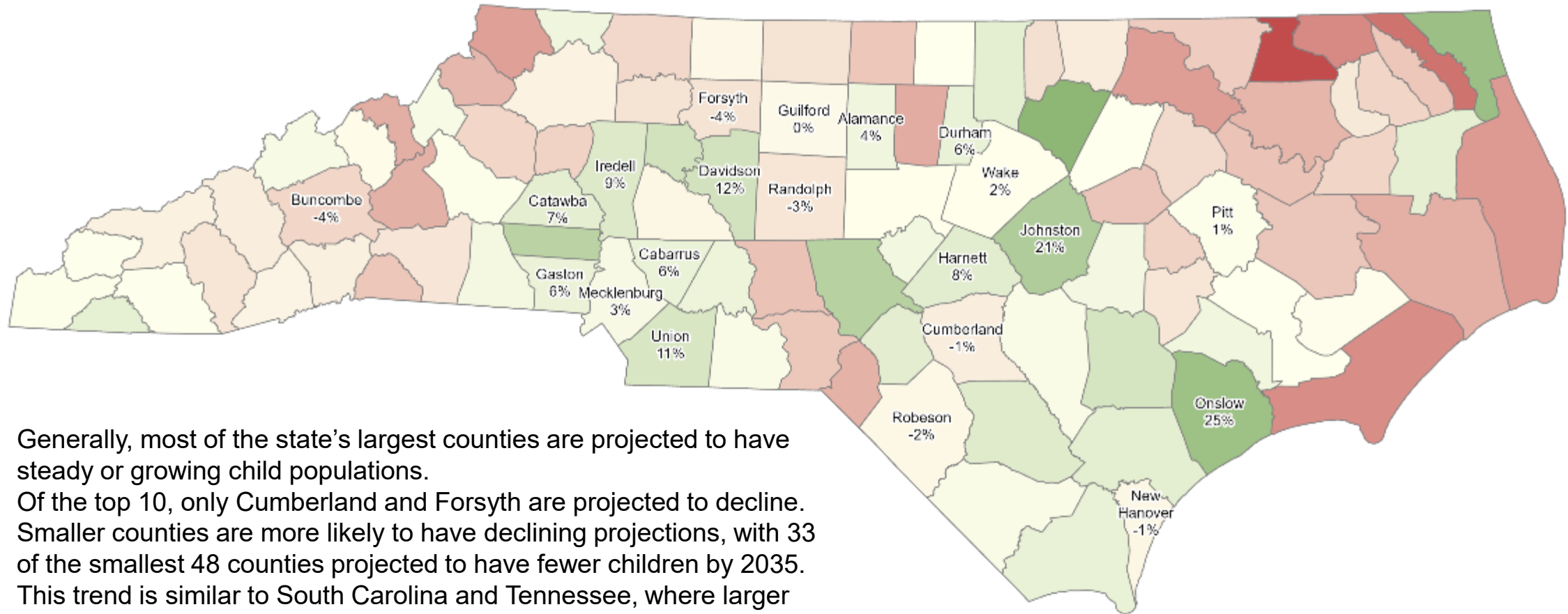
2019-20 to 2024-25 change in public school enrollment (district + charter)



- Most larger counties have had steady public school enrollment since
- 2019, mirroring the general strength of the child population in those areas.
- Johnston and Cabarrus have had 4-5% enrollment growth since 2019, the highest growth of the top 20 districts.
- Forsyth, Buncombe, and Catawba each are down 4%, showing the relatively tight range of enrollment changes in the largest counties. Each of these is also estimated to have a 1-2% student population decline, suggesting that enrollment declines are likely due to both fewer children AND some amount of additional choice toward private or home schooling.
- Of midsize districts (10k+ students), Franklin (+31%) and Pender (+13%) have larger growth.
- 32 counties have declines of at least 5%, many of which are smaller in size.

State demographers project that the child population will grow 5% by 2035, with larger counties generally growing while some smaller counties are projected to have fewer children

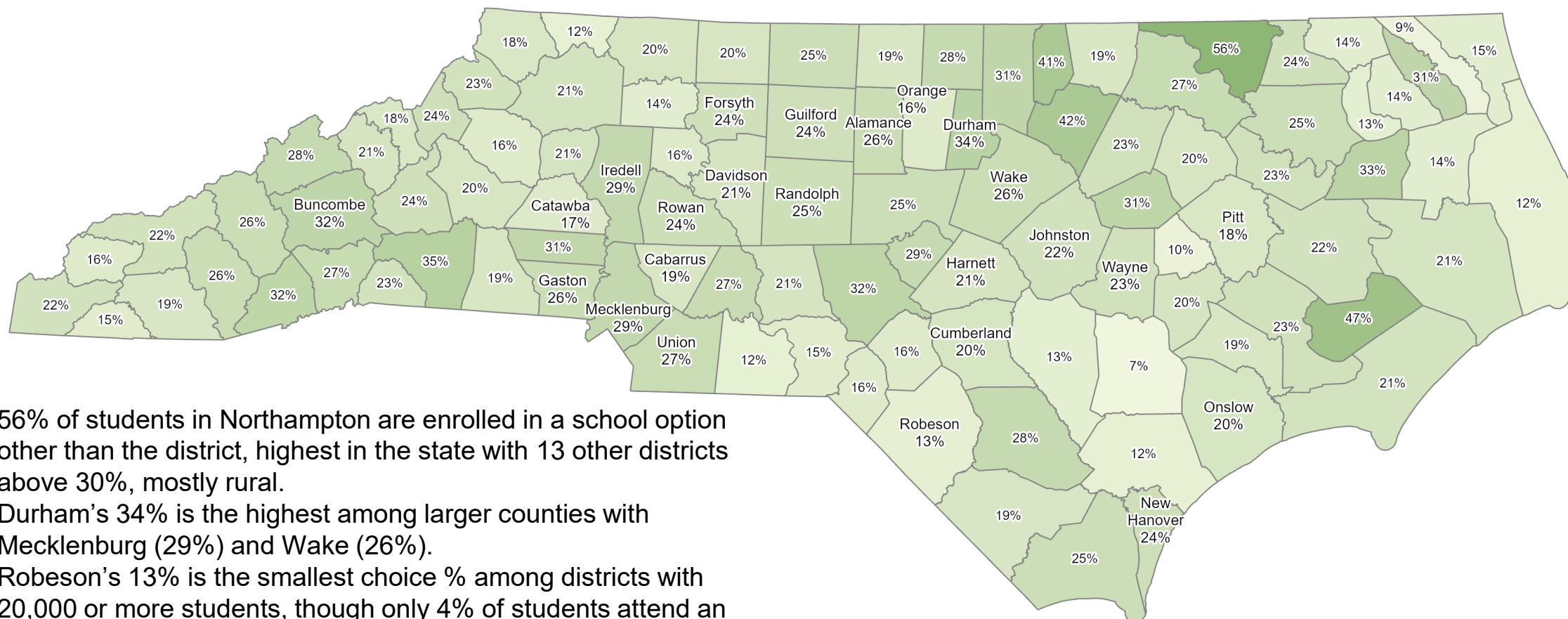
2020 to 2035 projected change in the under-18 population



- Generally, most of the state's largest counties are projected to have steady or growing child populations.
- Of the top 10, only Cumberland and Forsyth are projected to decline.
- Smaller counties are more likely to have declining projections, with 33 of the smallest 48 counties projected to have fewer children by 2035.
- This trend is similar to South Carolina and Tennessee, where larger counties are more likely to be growing and smaller counties are holding steady or shrinking.

25% of students attend a charter, private, or are home schooled, with rates much higher in some areas, showing the breadth of choice options for families

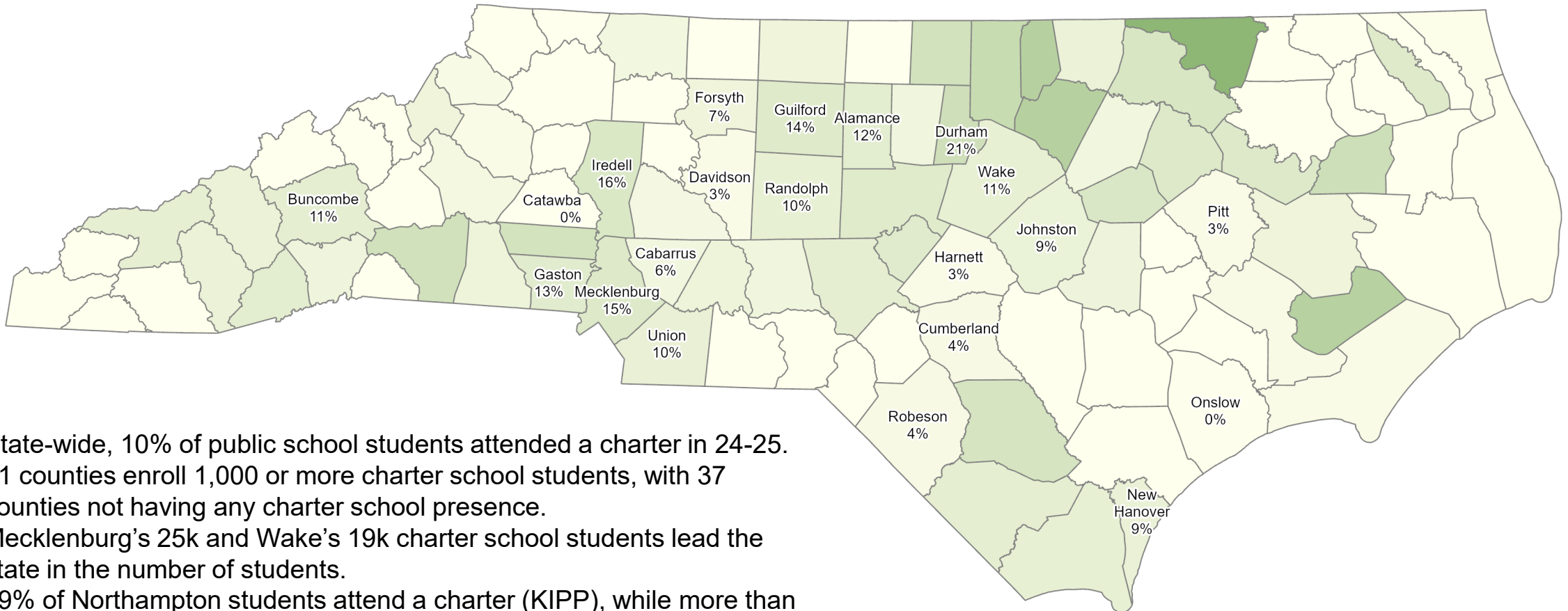
24-25 % of students enrolled in a charter, private, or home school



- 56% of students in Northampton are enrolled in a school option other than the district, highest in the state with 13 other districts above 30%, mostly rural.
- Durham's 34% is the highest among larger counties with Mecklenburg (29%) and Wake (26%).
- Robeson's 13% is the smallest choice % among districts with 20,000 or more students, though only 4% of students attend an A or B school.

10% of students statewide attend a charter school, but percentages vary widely by county, even among the larger counties in the state

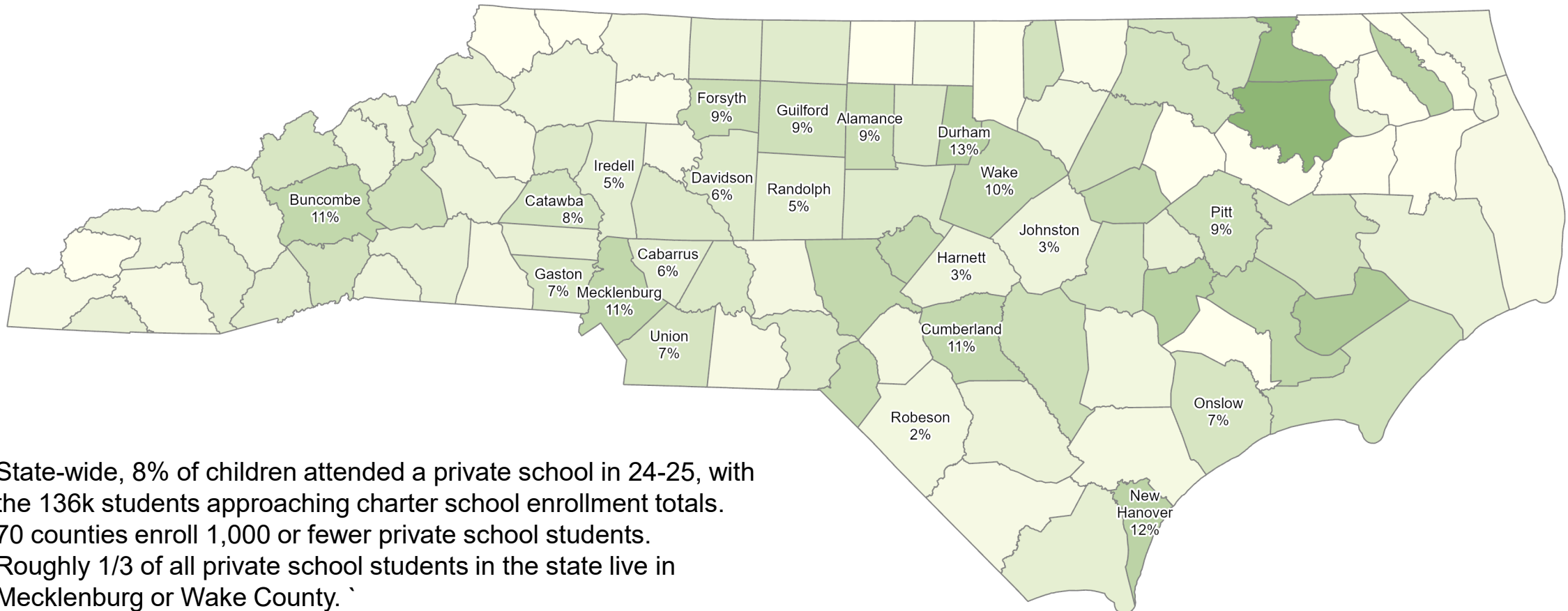
24-25 % of public school students enrolled in a charter school



- State-wide, 10% of public school students attended a charter in 24-25.
- 31 counties enroll 1,000 or more charter school students, with 37 counties not having any charter school presence.
- Mecklenburg's 25k and Wake's 19k charter school students lead the state in the number of students.
- 49% of Northampton students attend a charter (KIPP), while more than 30% of Franklin, Vance, and Pamlico public school students attend a charter school.

8% of children in the state attend a private school, roughly the same as charter schools, though there is variance between counties, including larger counties

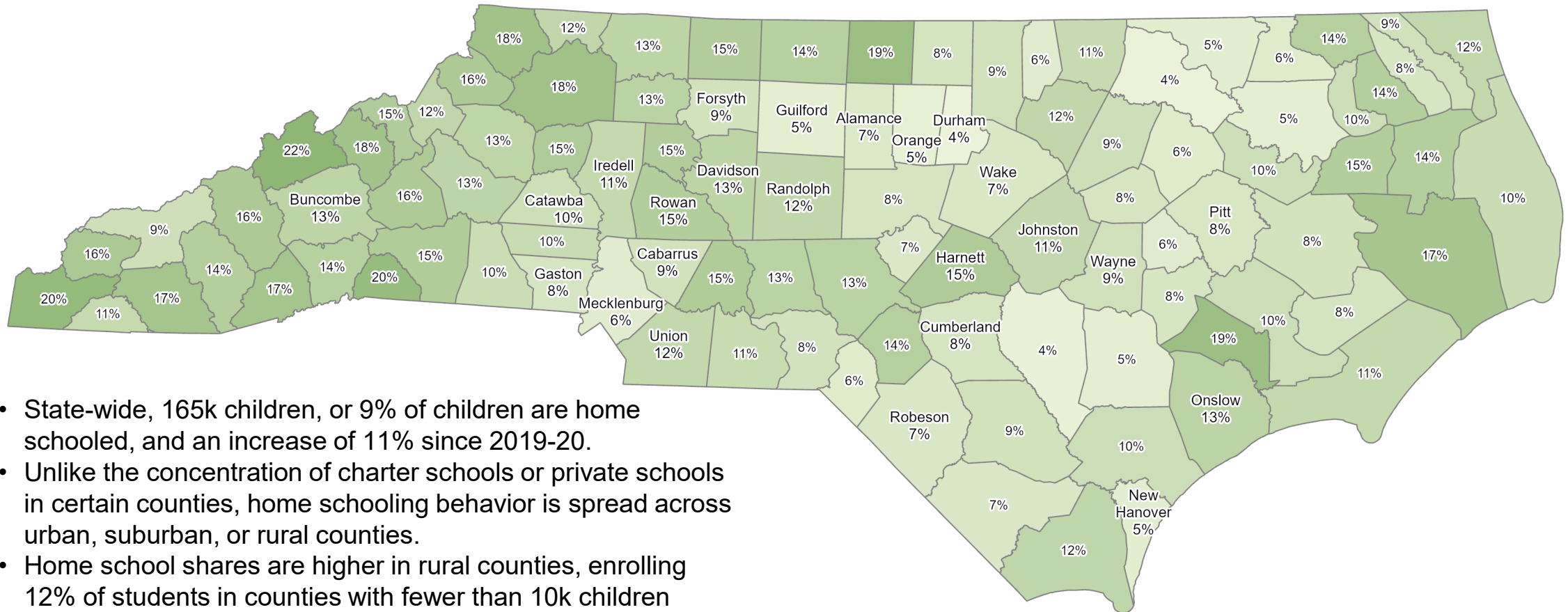
24-25 % of students enrolled in private school



- State-wide, 8% of children attended a private school in 24-25, with the 136k students approaching charter school enrollment totals.
- 70 counties enroll 1,000 or fewer private school students.
- Roughly 1/3 of all private school students in the state live in Mecklenburg or Wake County.

Rural counties have a greater share of students being home schooled (9%) than more populous counties, a trend seen in other states

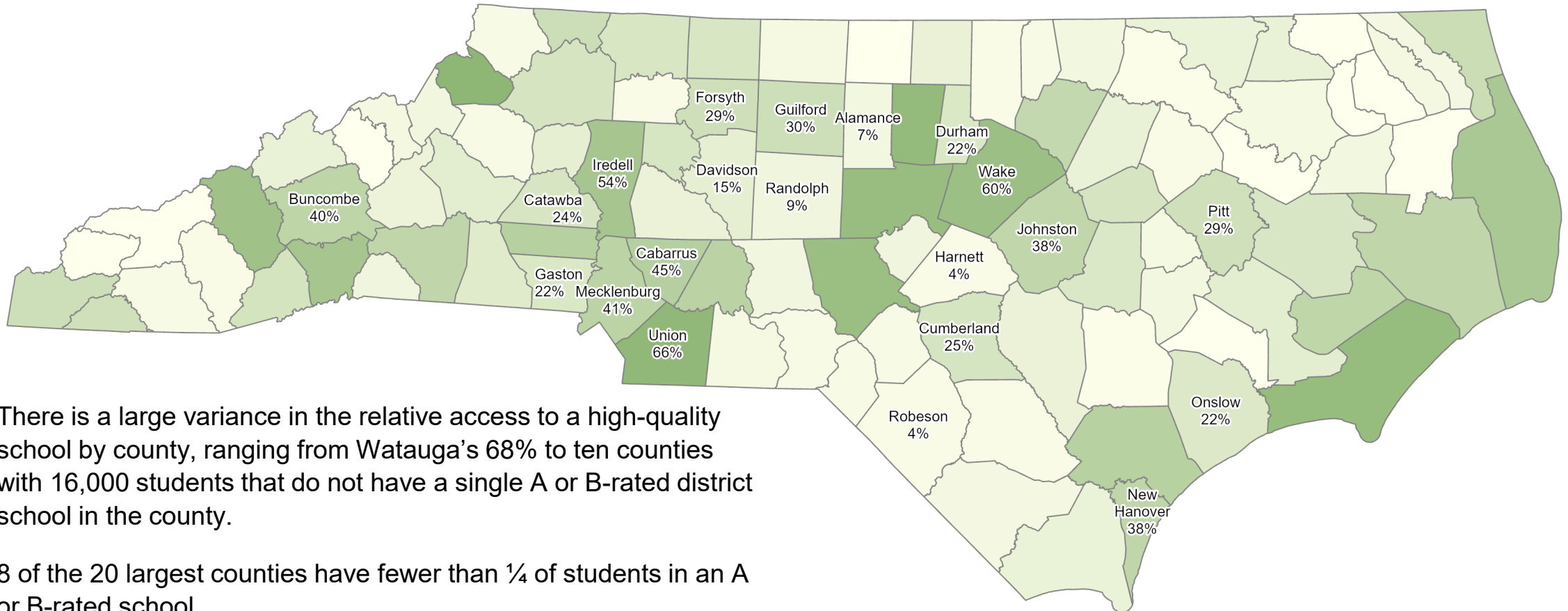
24-25 % of students enrolled in home school



- State-wide, 165k children, or 9% of children are home schooled, and an increase of 11% since 2019-20.
- Unlike the concentration of charter schools or private schools in certain counties, home schooling behavior is spread across urban, suburban, or rural counties.
- Home school shares are higher in rural counties, enrolling 12% of students in counties with fewer than 10k children versus 10% of students in the 20 largest counties.

32% of students statewide attend an A or B-rated district school, but the percentage varies by county

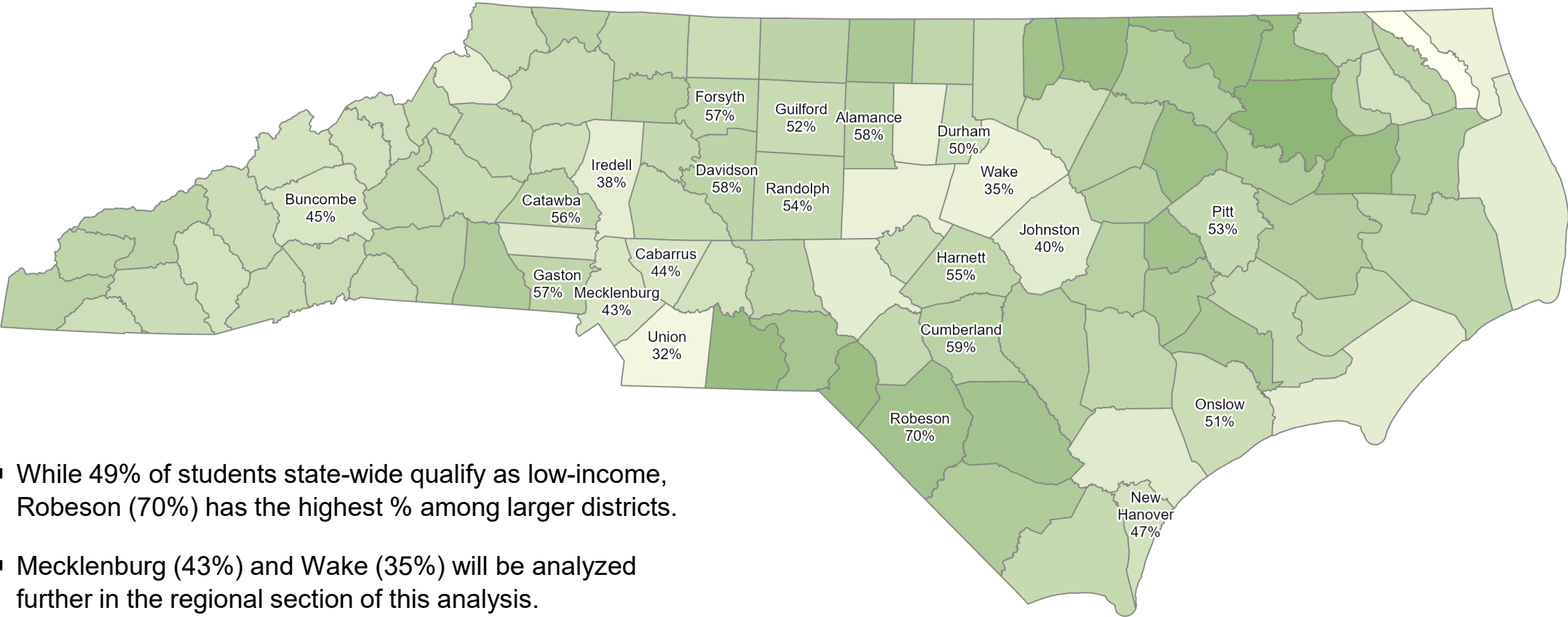
2025 % of students attending an A- or B-rated district school



- There is a large variance in the relative access to a high-quality school by county, ranging from Watauga's 68% to ten counties with 16,000 students that do not have a single A or B-rated district school in the county.
- 8 of the 20 largest counties have fewer than $\frac{1}{4}$ of students in an A or B-rated school.
- Districts are explored further in the next section to understand variance within counties that have multiple school districts.

Socioeconomic diversity varies by county, with Robeson’s 70% highest among large districts versus 32% in Union

% Economically Disadvantaged

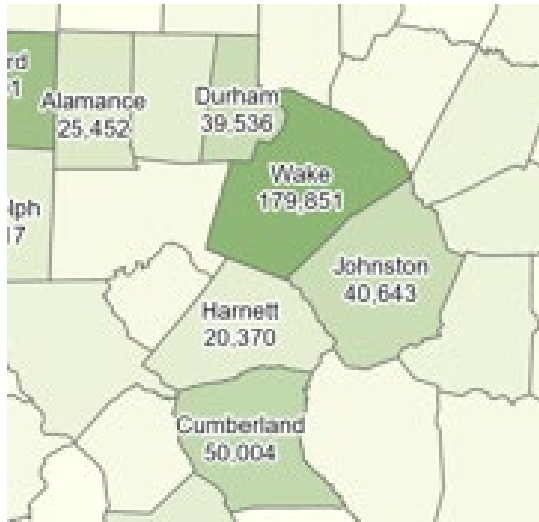


- While 49% of students state-wide qualify as low-income, Robeson (70%) has the highest % among larger districts.
- Mecklenburg (43%) and Wake (35%) will be analyzed further in the regional section of this analysis.

Sample Regional Insights

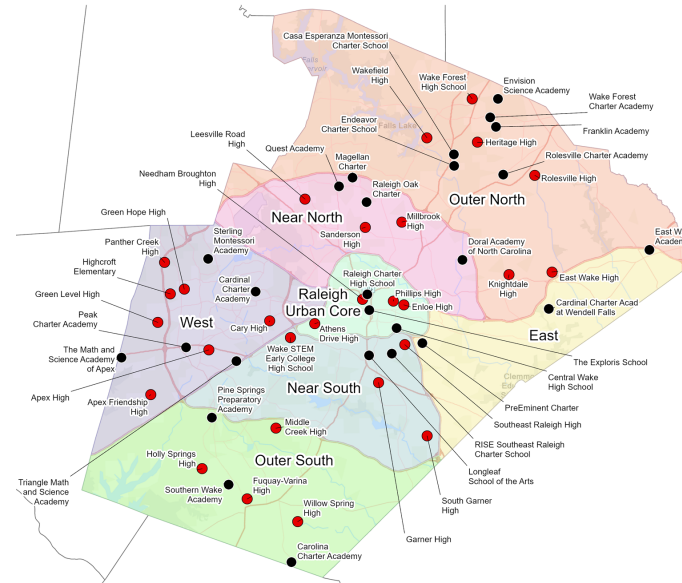
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District Level



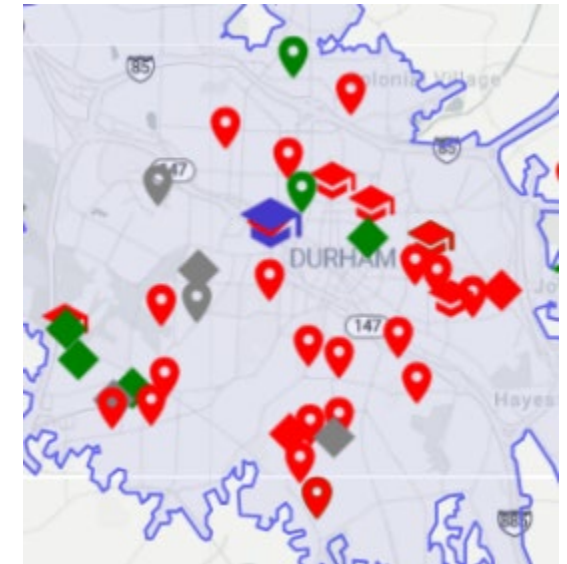
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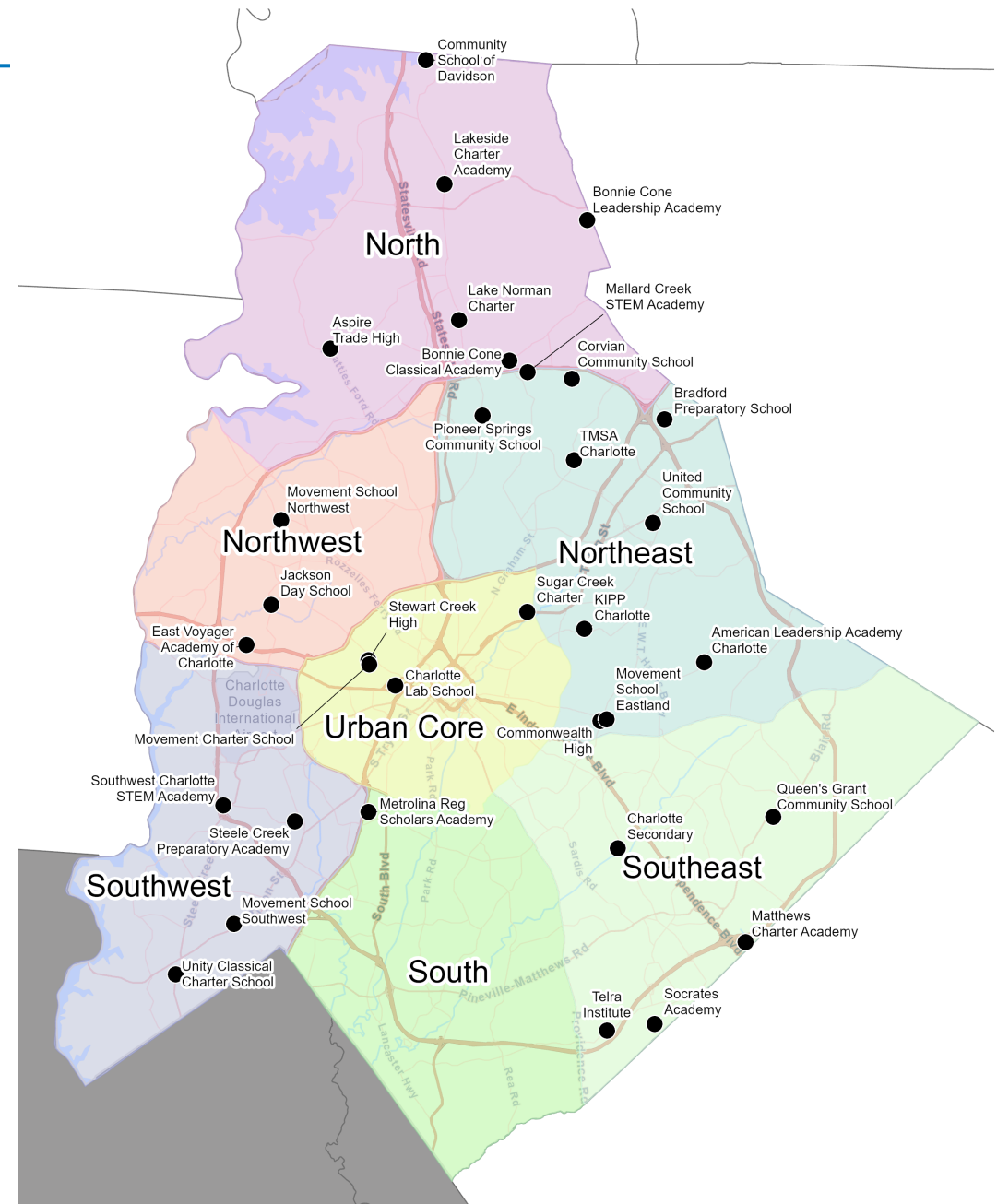
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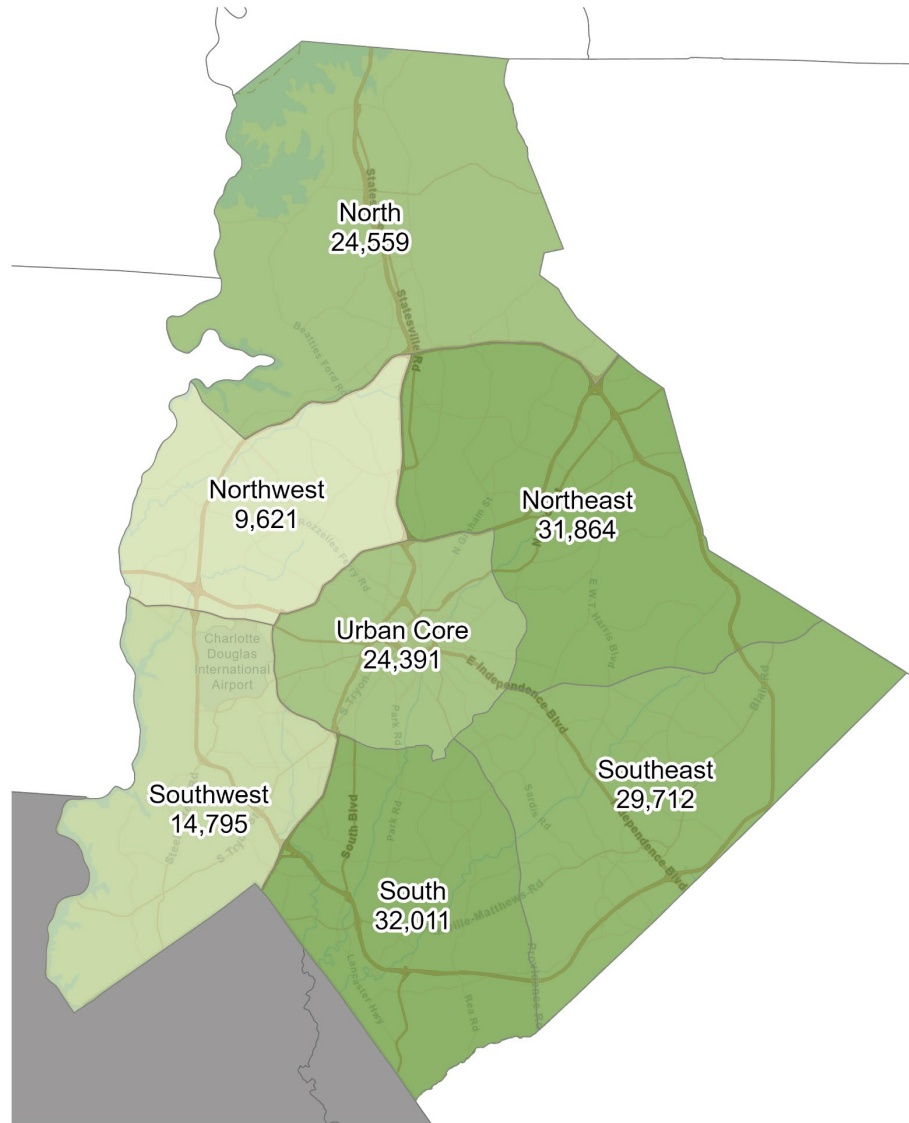
Overview of Mecklenburg Regions

- To better understand the education landscape at a local level within Mecklenburg County, seven regions have been created using major highways as dividing lines.

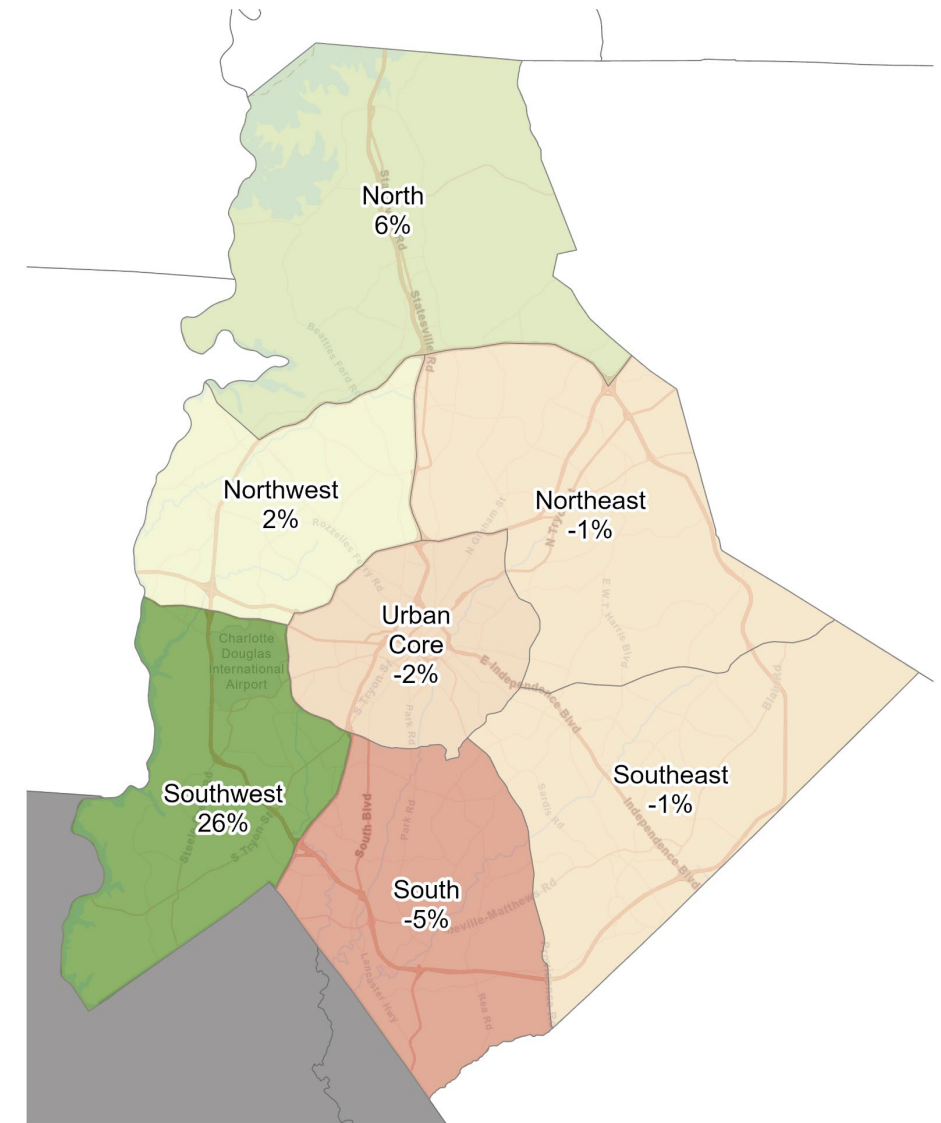


Mecklenburg Regions: Enrollment Size and Change since 2019

2024-25 Public School K-12 Enrollment (District plus Charter)

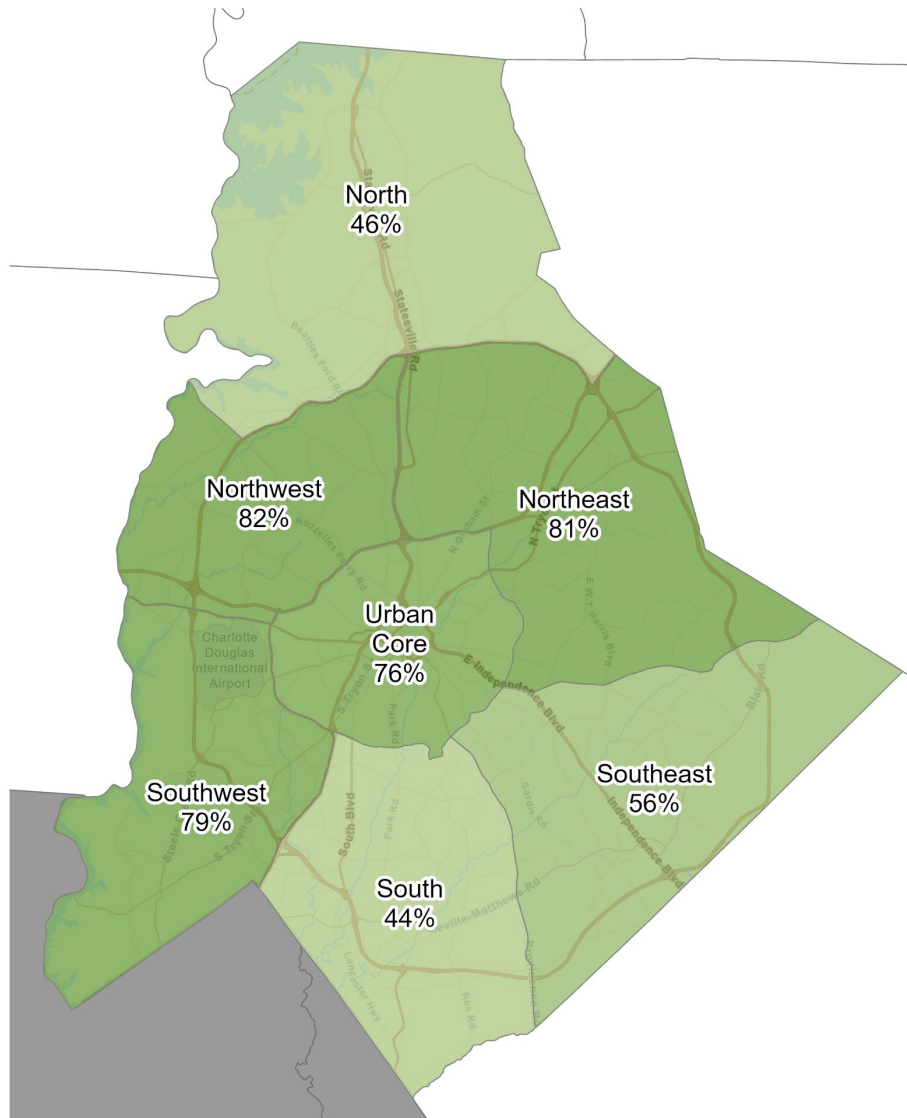


2019-20 to 2024-25 Change in Public School Enrollment

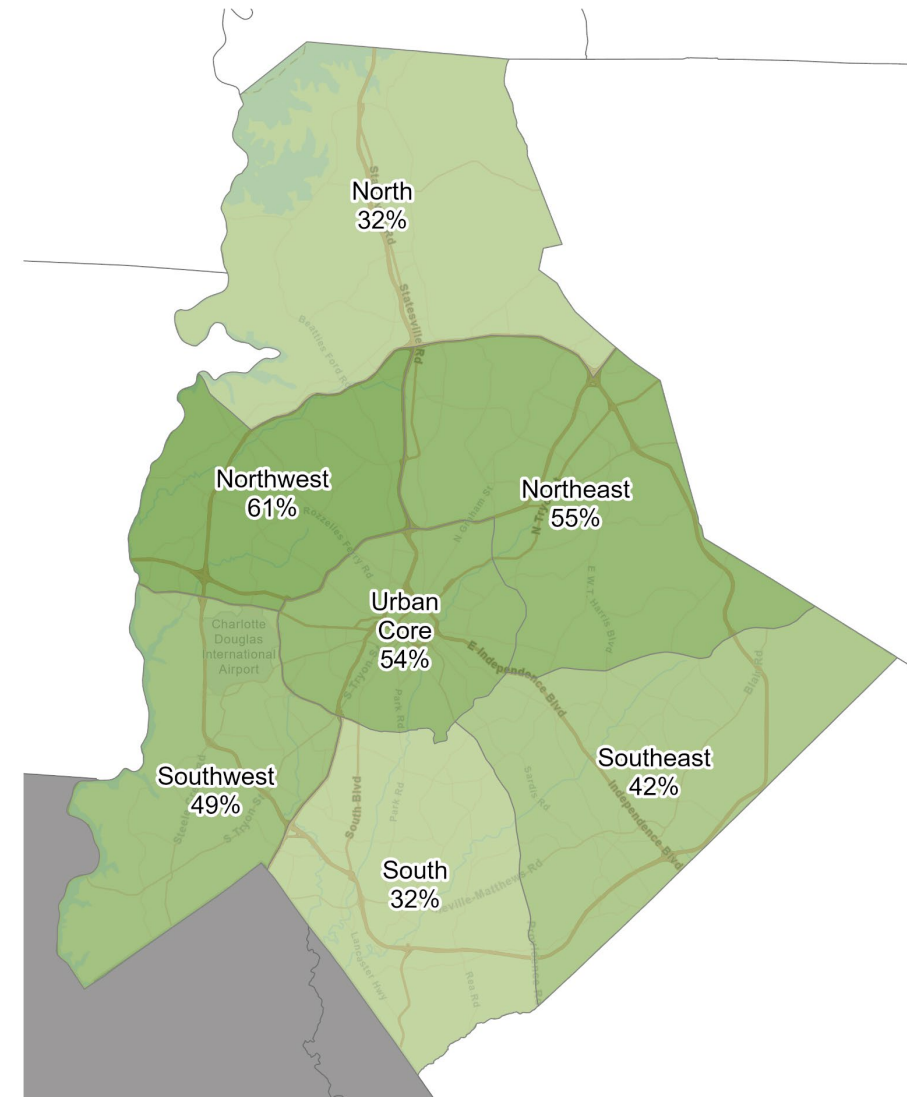


Mecklenburg Regions: Race, ethnicity, and socioeconomic demographics

% of students who identify as Black, Hispanic, or Native American

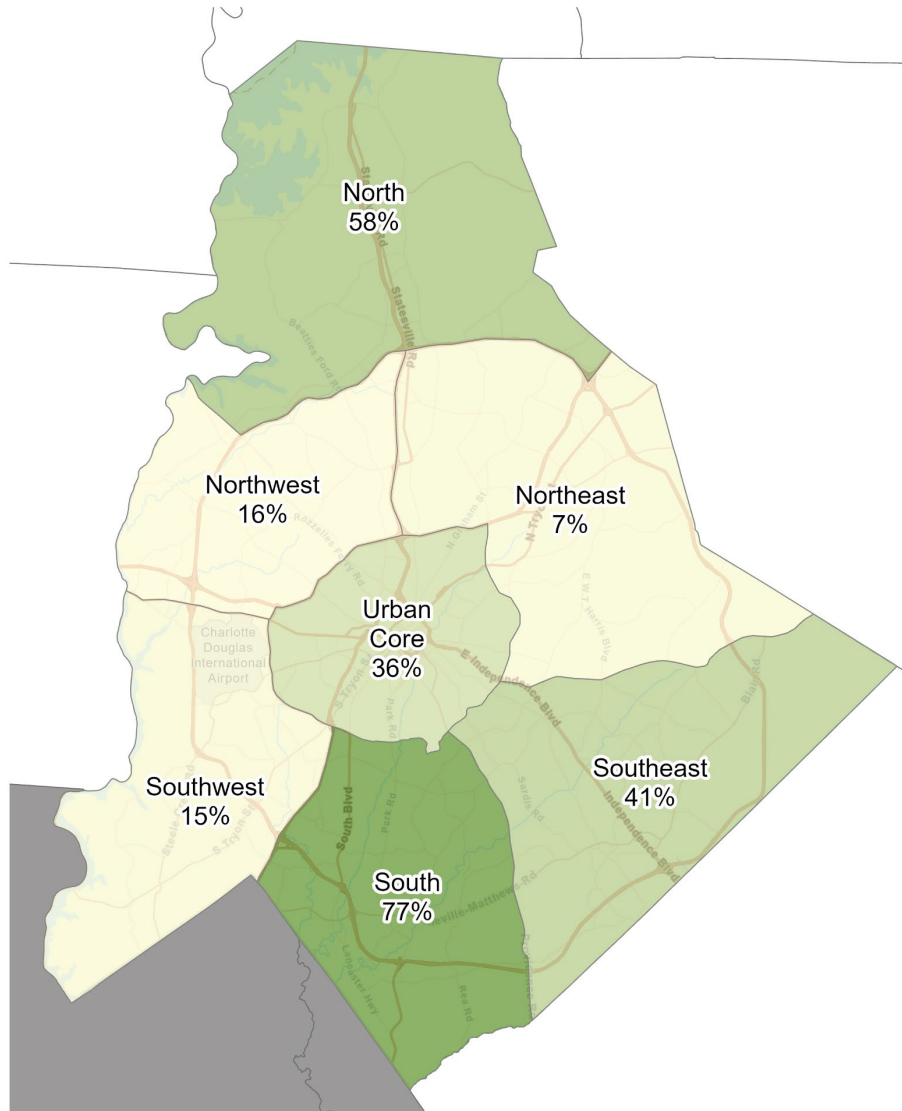


% of students who qualify as Economically Disadvantaged

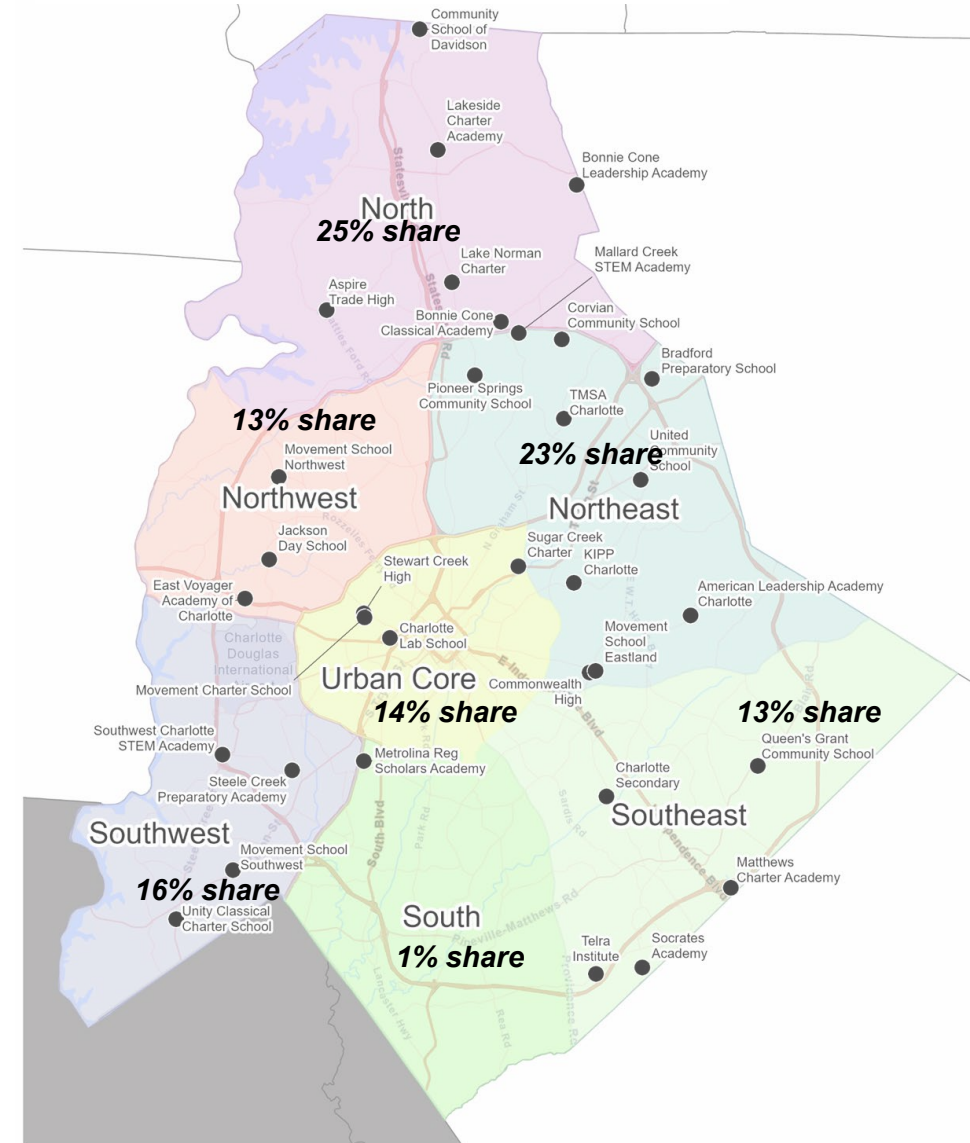


Mecklenburg Regions: Academic Quality and Charter Schools

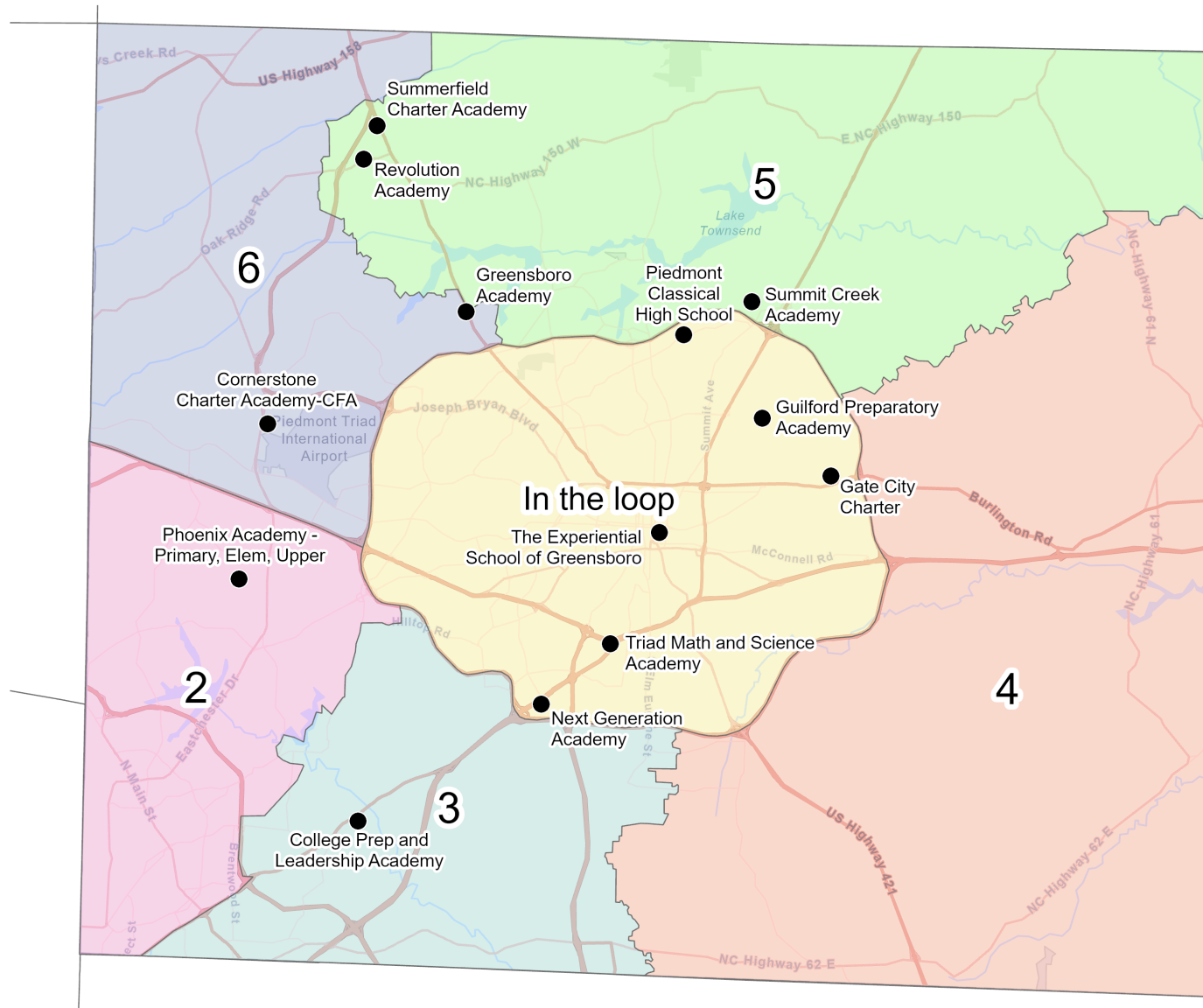
% of Students Attending A or B-rated schools



*% of Students Attending a Charter School**



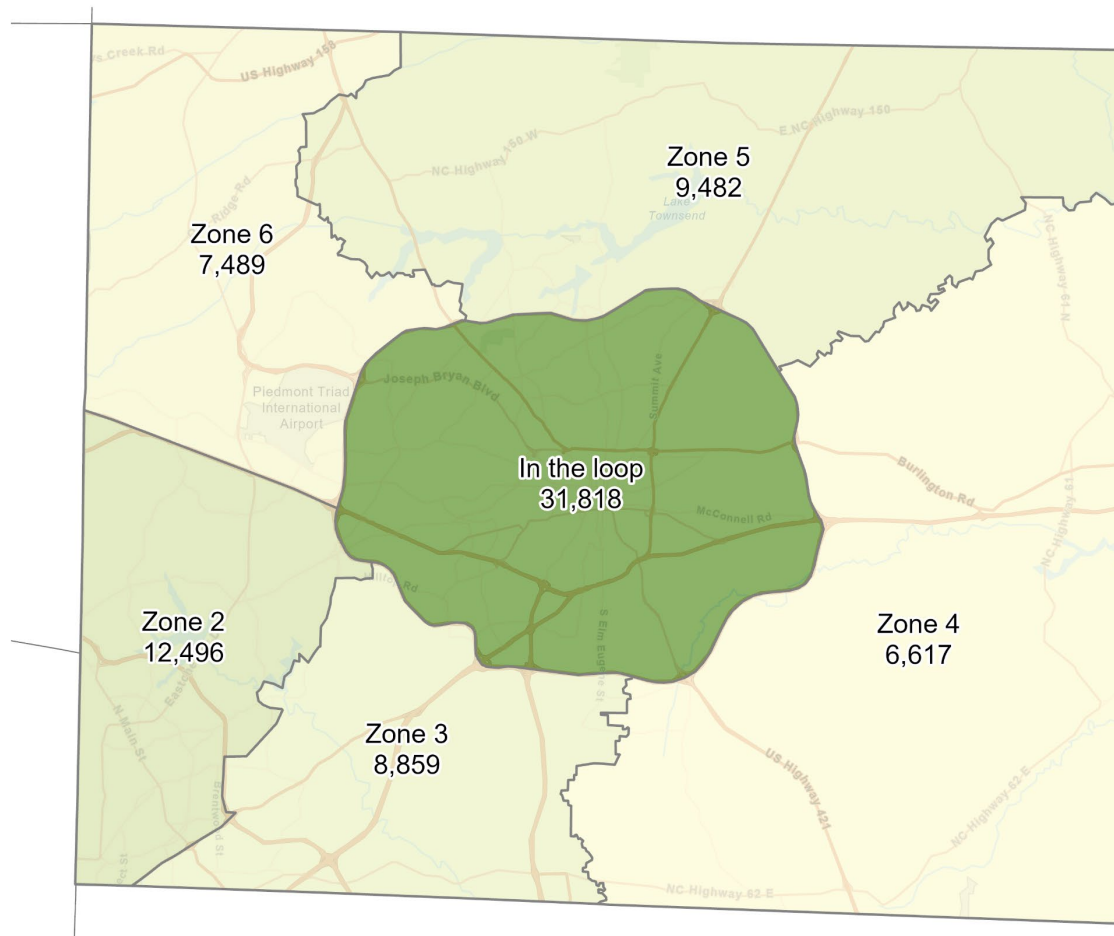
Guilford County: Regional Approach



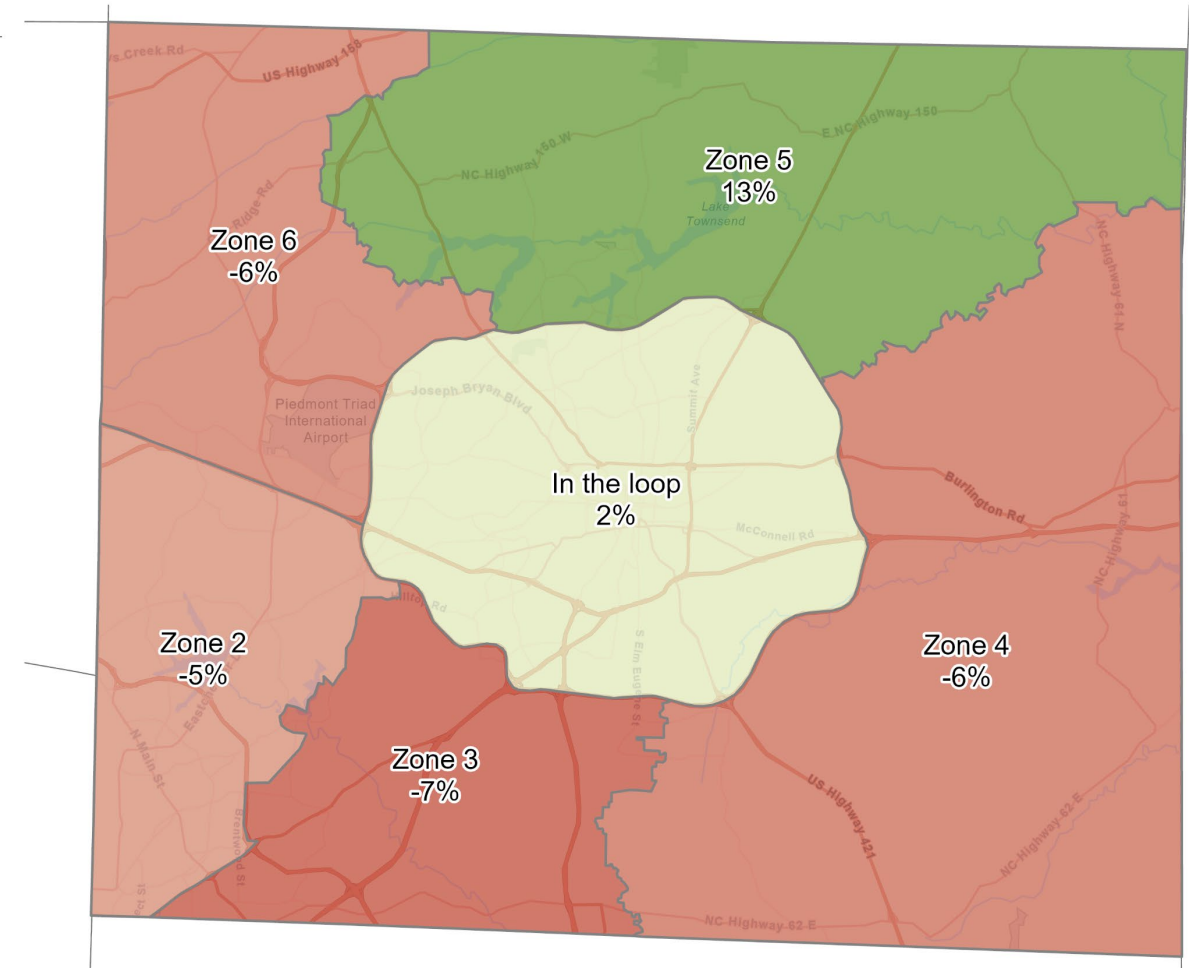
This approach creates a “loop” to analyze schools located inside the loop from suburban areas, which rely on the school district’s regional approach.

Guilford Regional Enrollment Size and Change since 2019

2024-25 Public School Enrollment

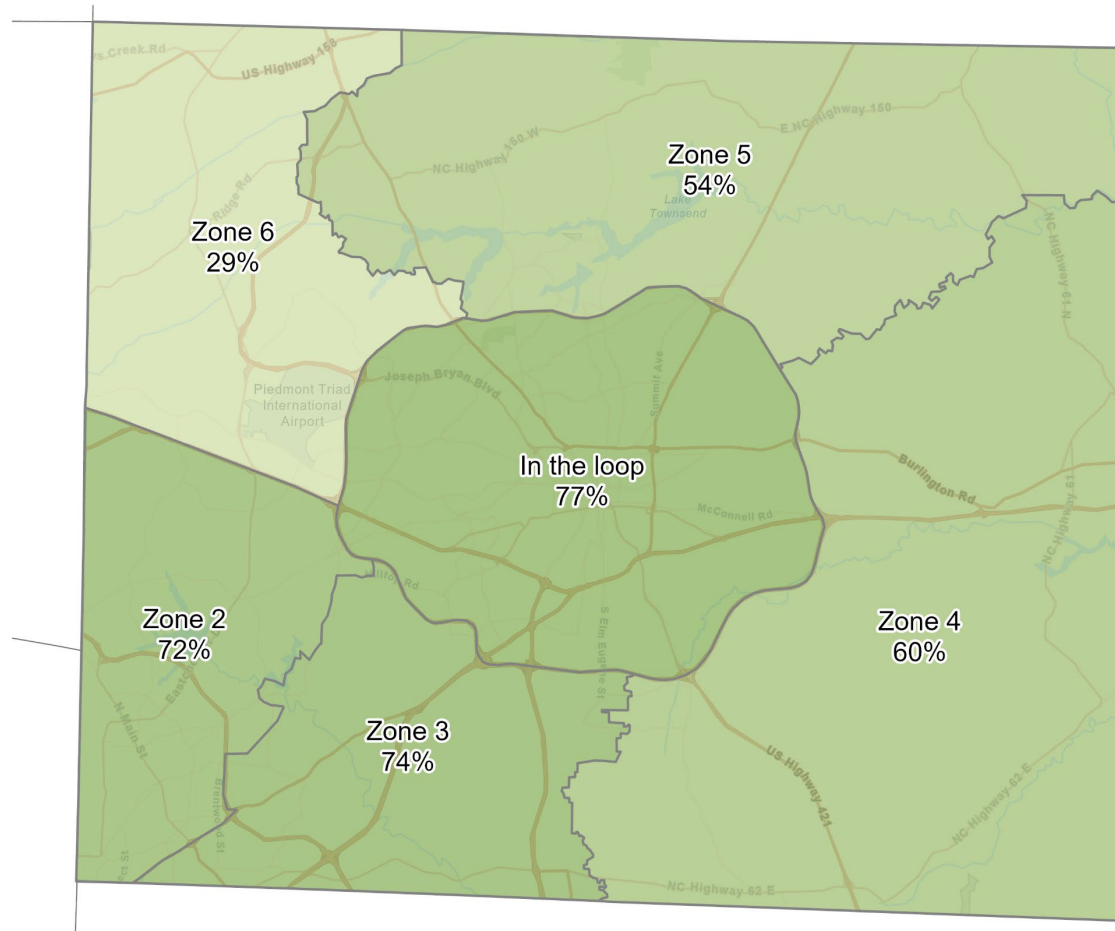


2019-20 to 2024-25 Change in Enrollment

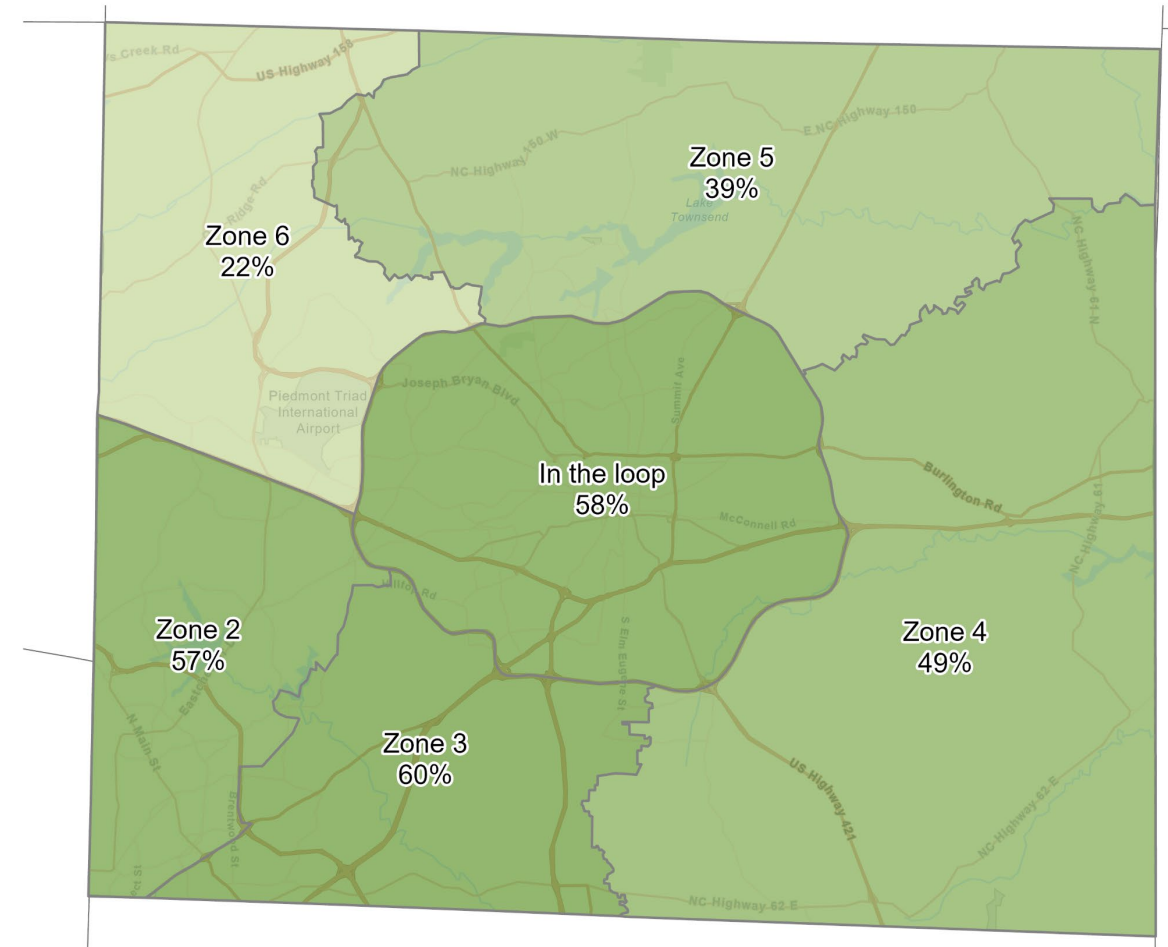


Guilford Regional Diversity

% Black / Hispanic / Native American

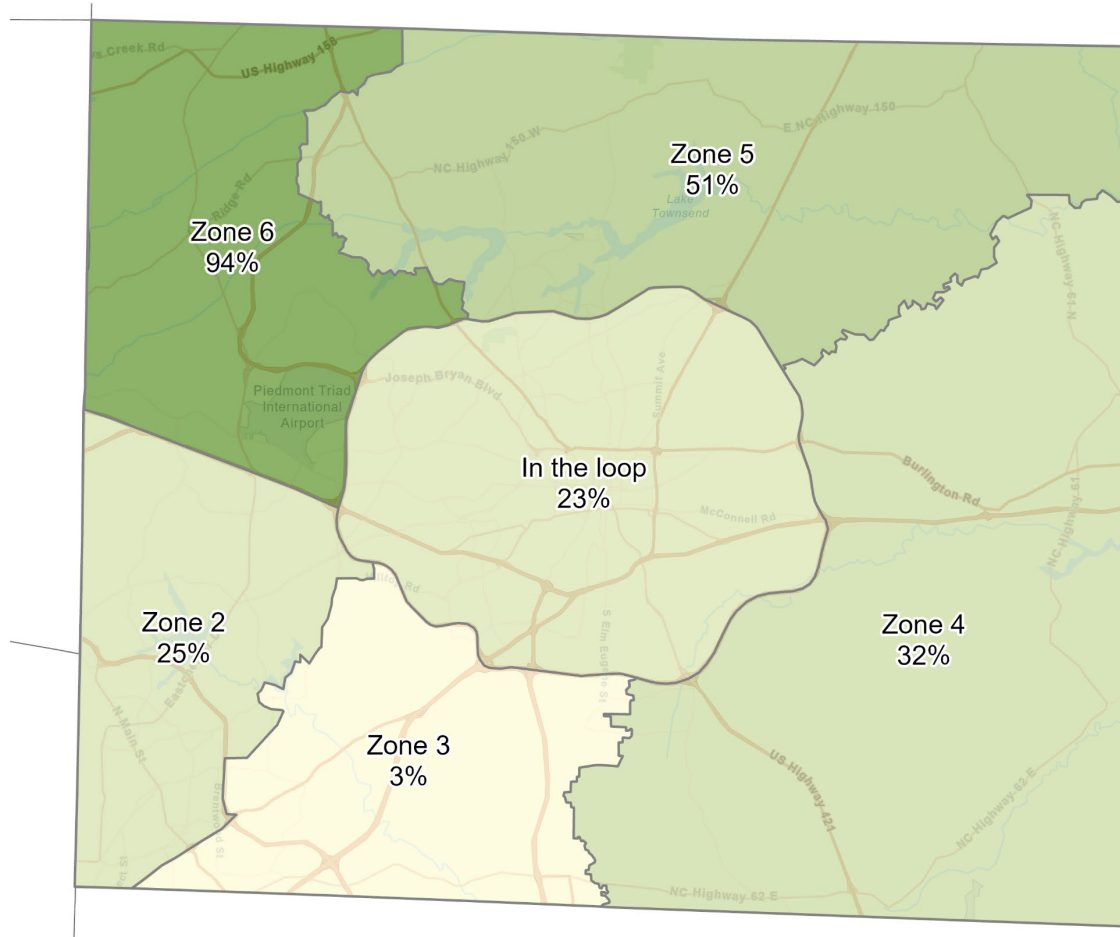


% Economically Disadvantaged

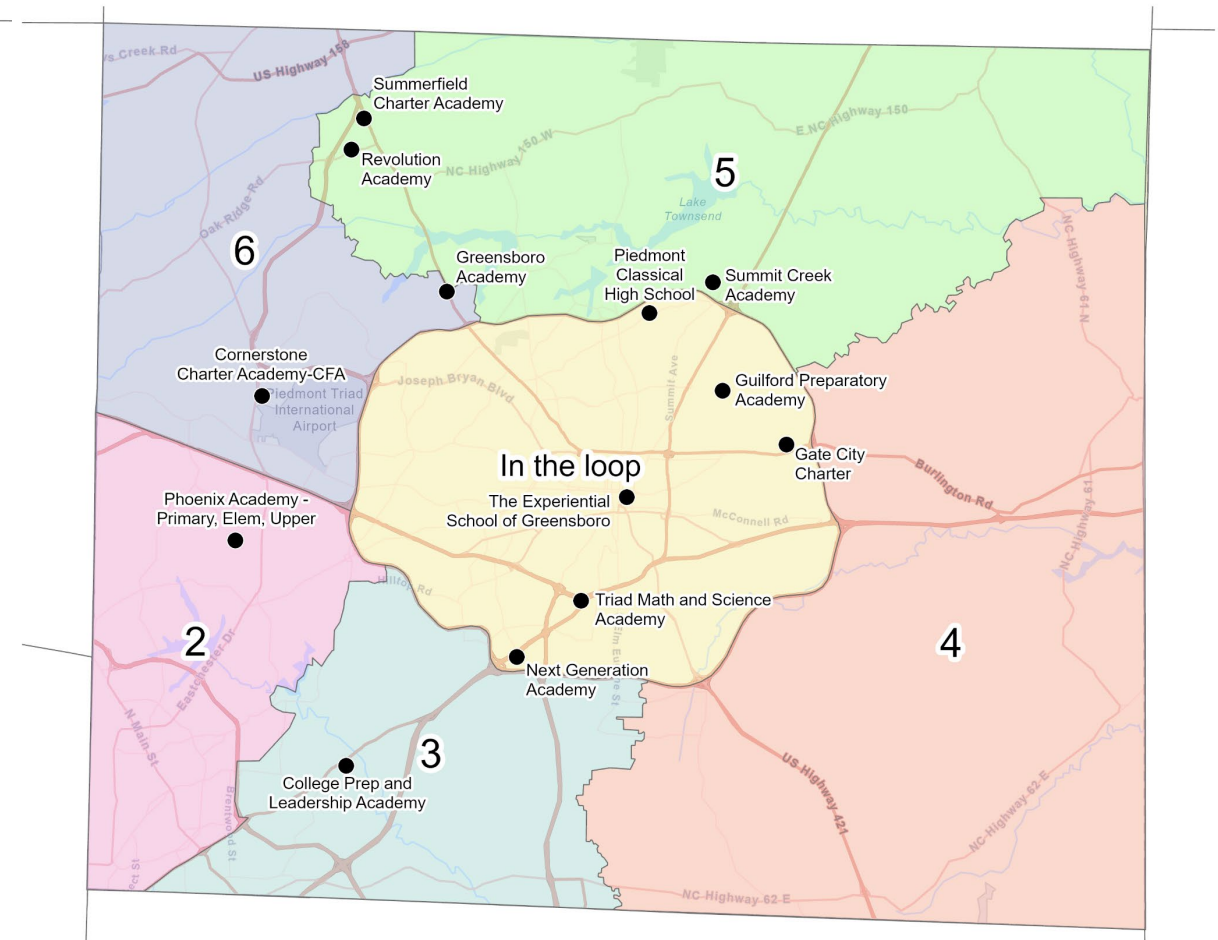


Guilford Regional Access to High Quality Schools

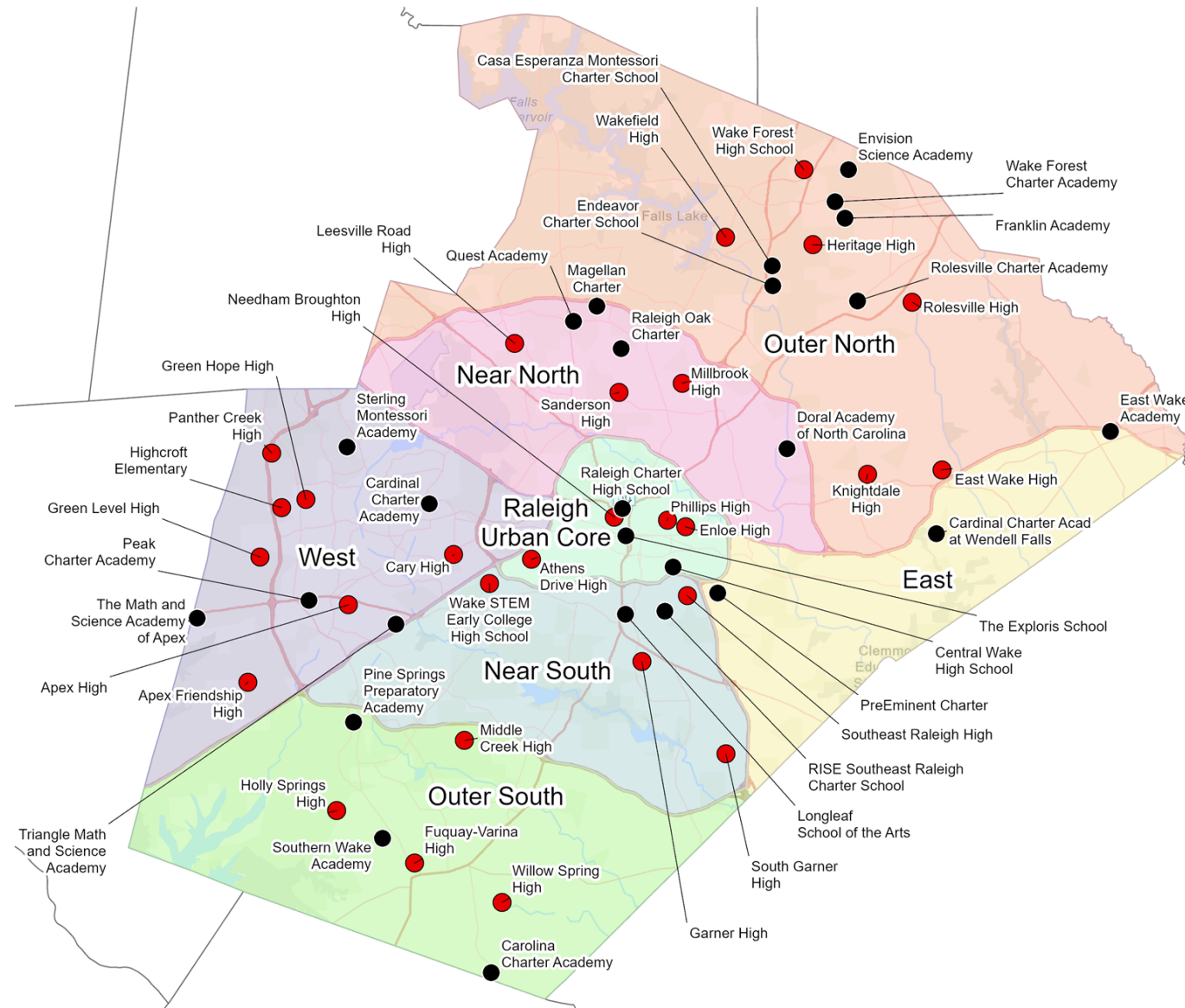
% Students Enrolled in an A or B-rated school



% Students Enrolled in a charter school



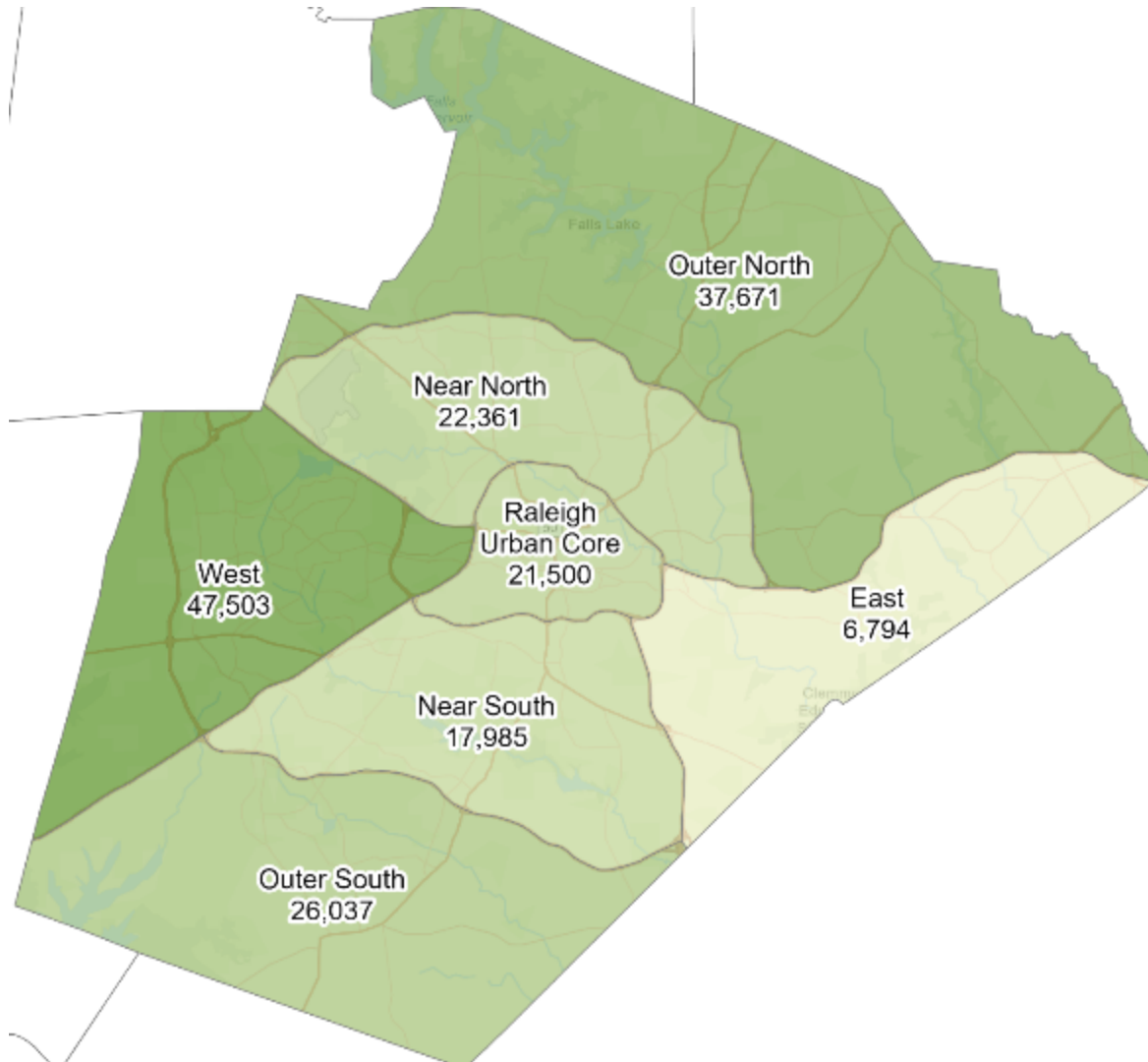
Overview of Wake County Regions



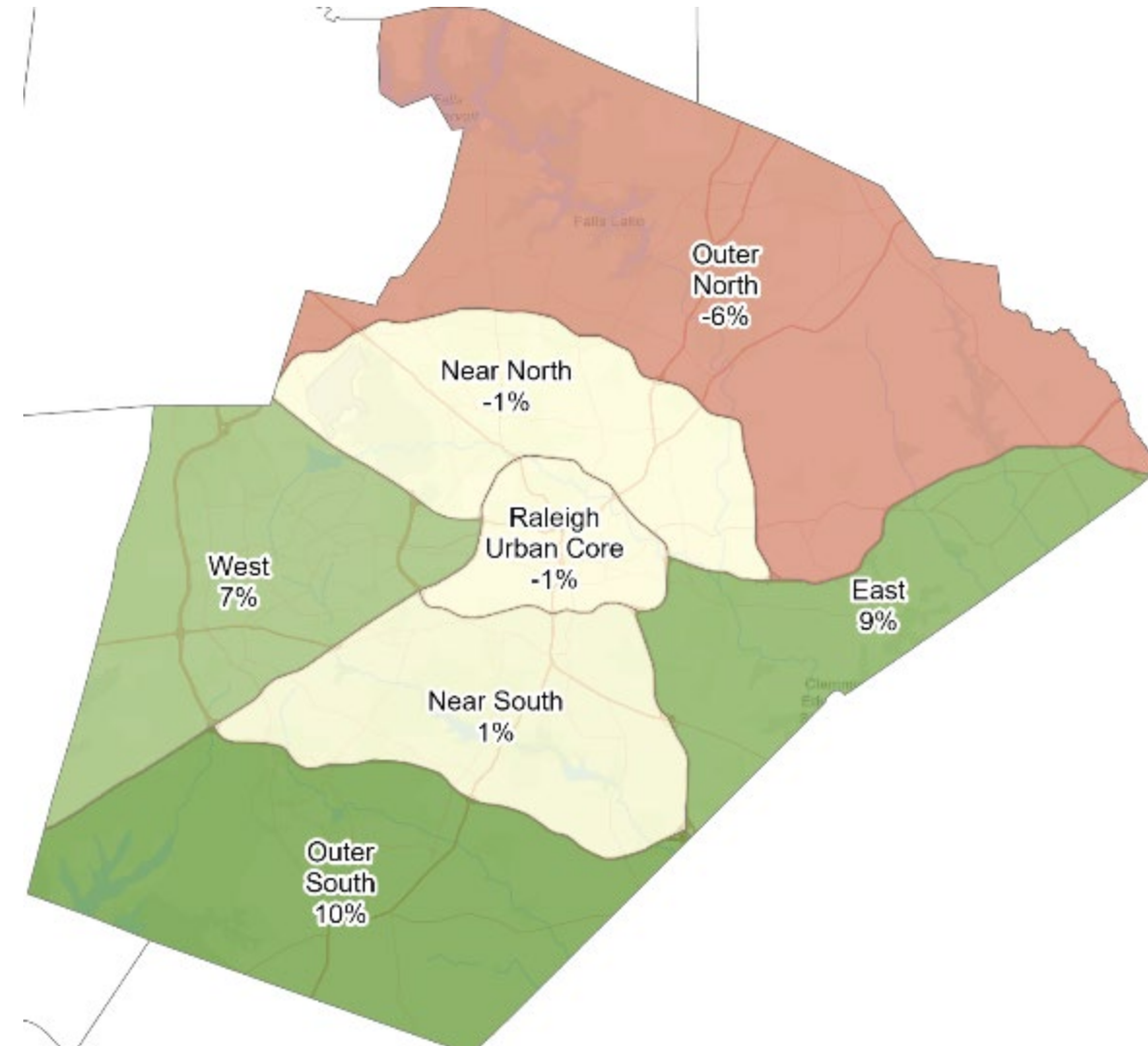
- To better understand the education landscape at a local level within Wake County, seven regions have been created using major highways as dividing lines.
- These were shaped in part via discussion with a local school leader.

Wake County Regions: Enrollment Size and Change since 2019

2024-25 Public School K-12 Enrollment (District plus Charter)

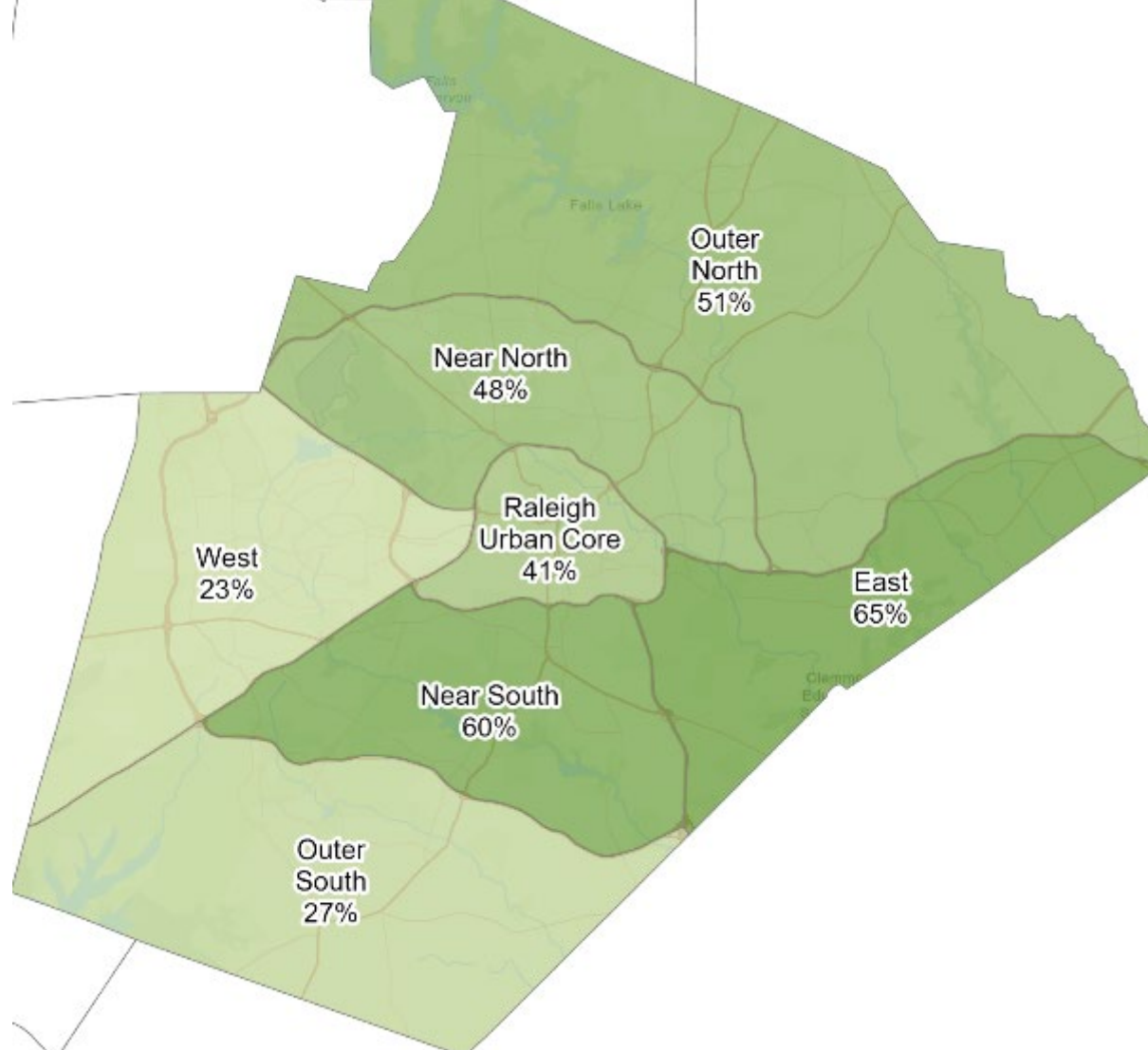


2019-20 to 2024-25 Change in Public School Enrollment

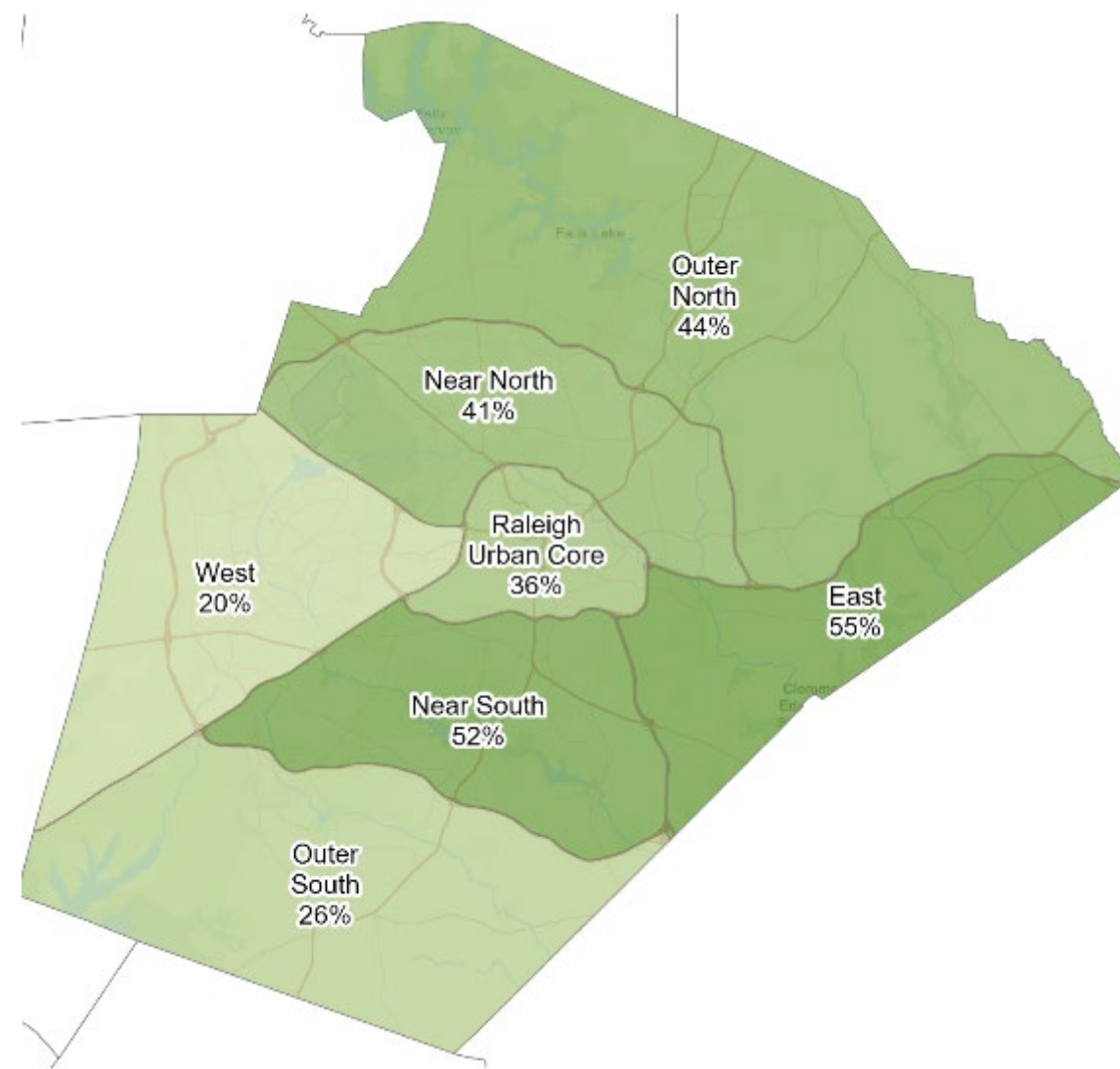


Wake County Regions: Race, ethnicity, and socioeconomic demographics

% of students who identify as Black, Hispanic, or Native American

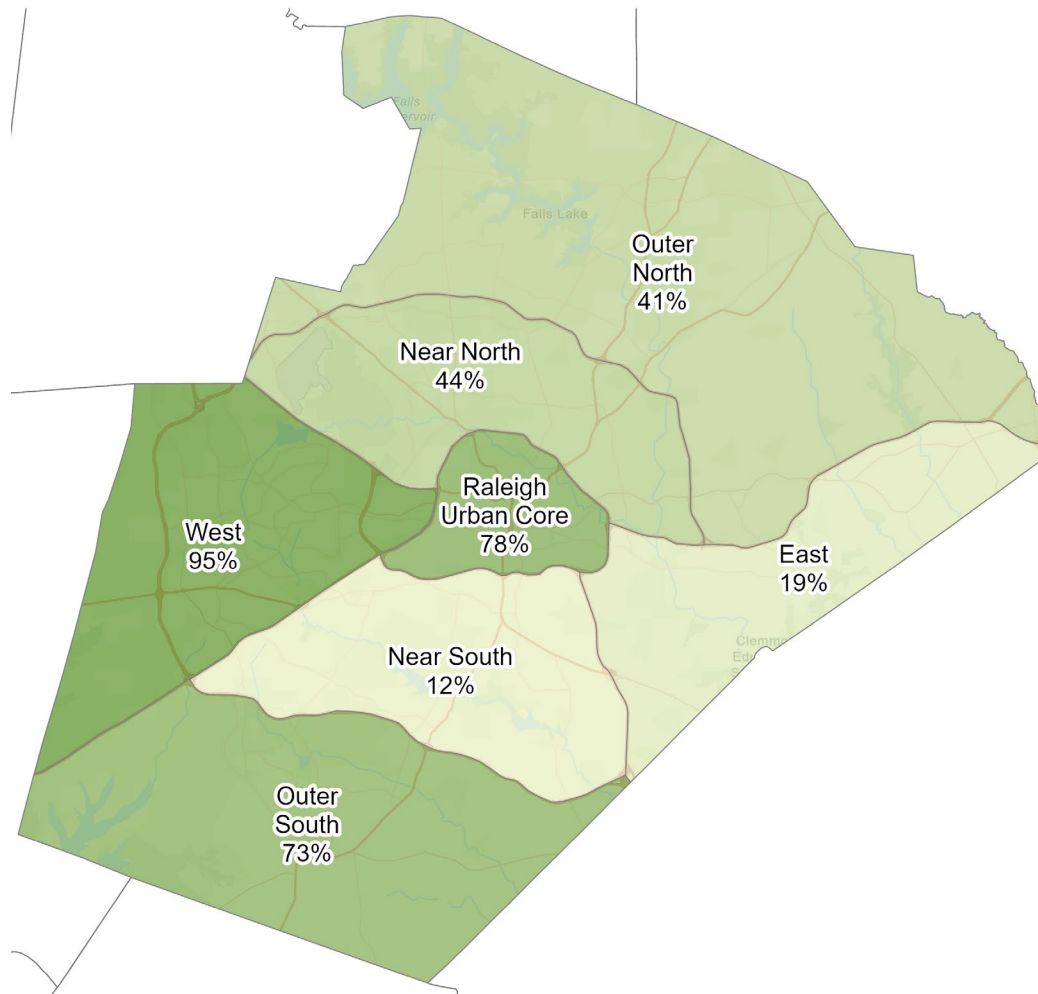


% of students who qualify as Economically Disadvantaged

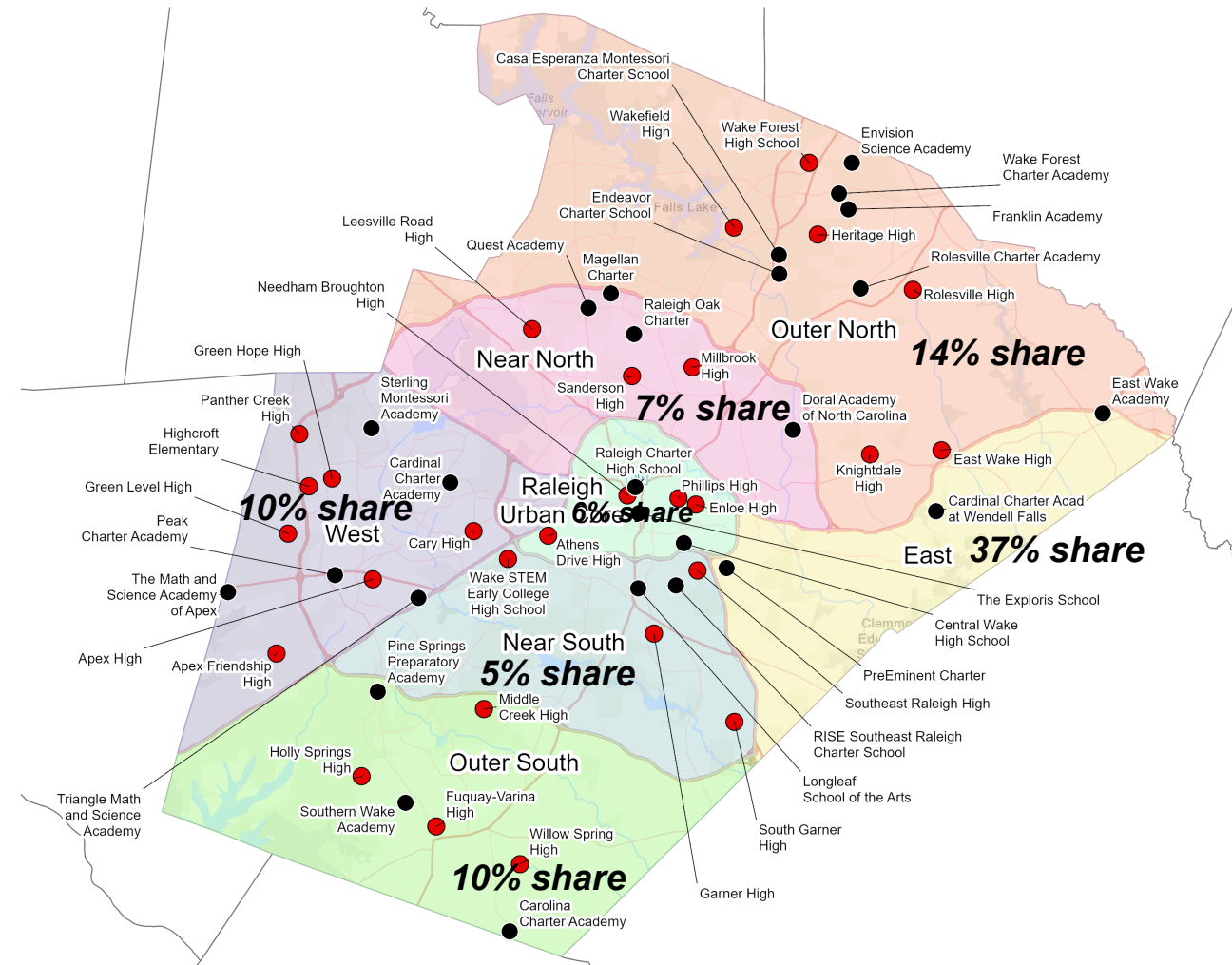


Wake County Regions: Academic Quality and Charter Schools

% of Students Attending A or B-rated schools

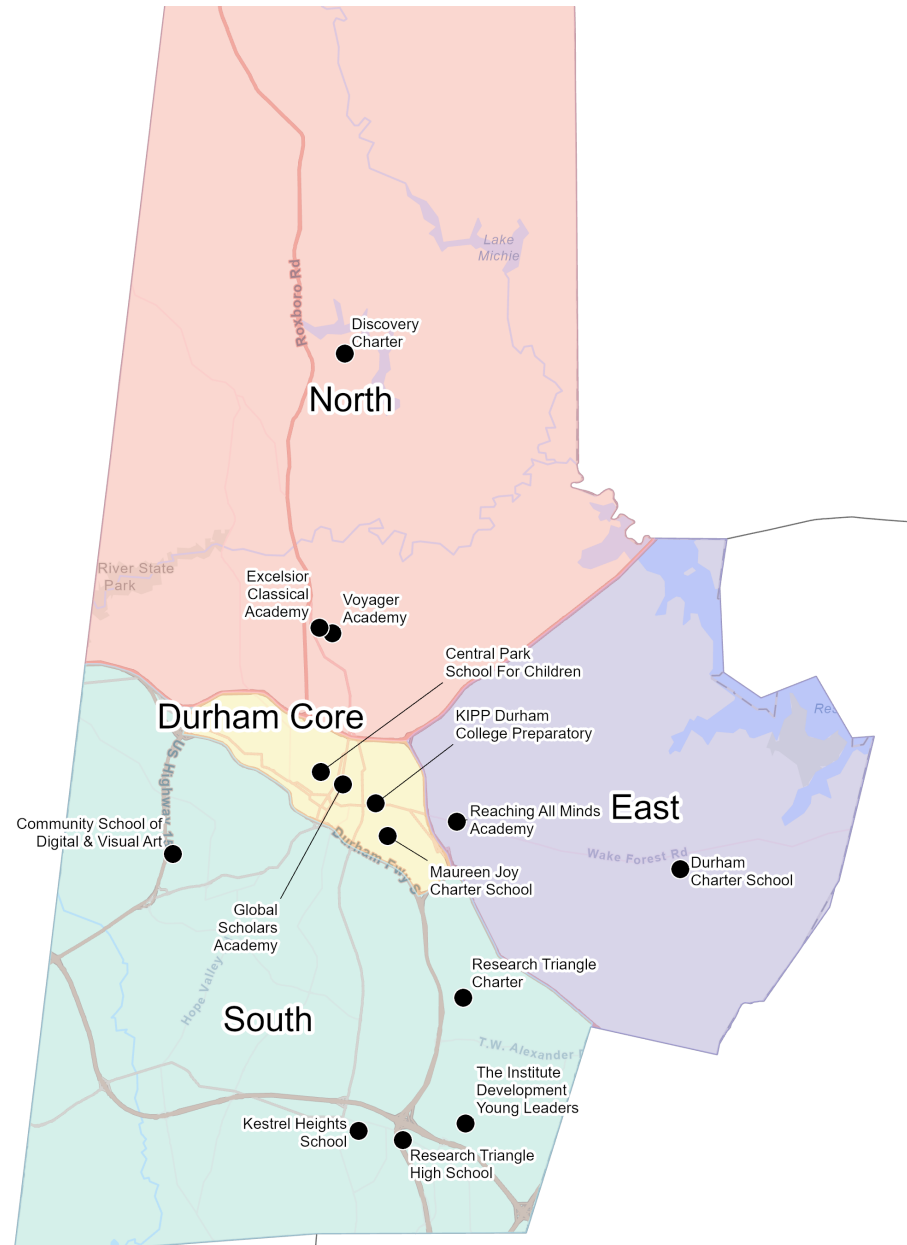


% of Students Attending a Charter School*



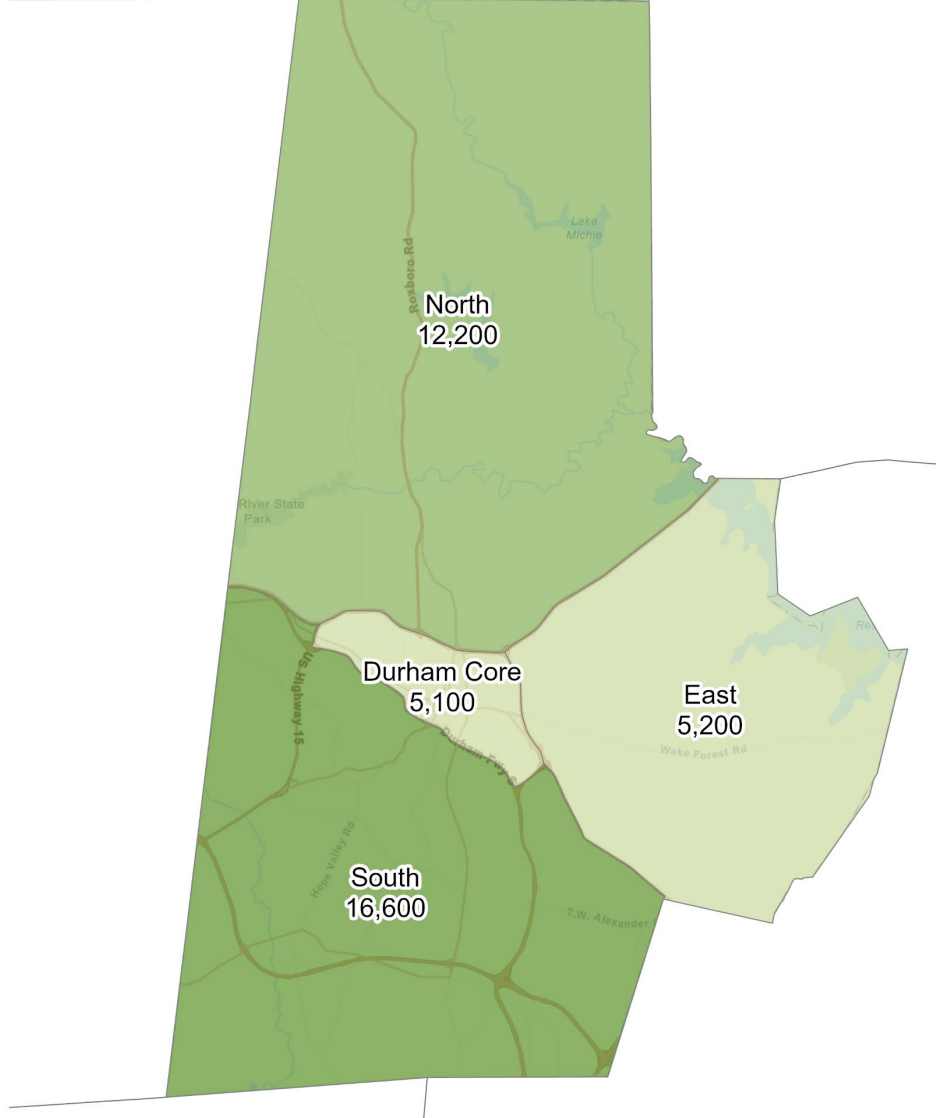
Overview of Durham Regions

To better understand the education landscape at a local level within Durham, four regions have been created using major highways as dividing lines. These were shaped in part via discussion with a local school leader.

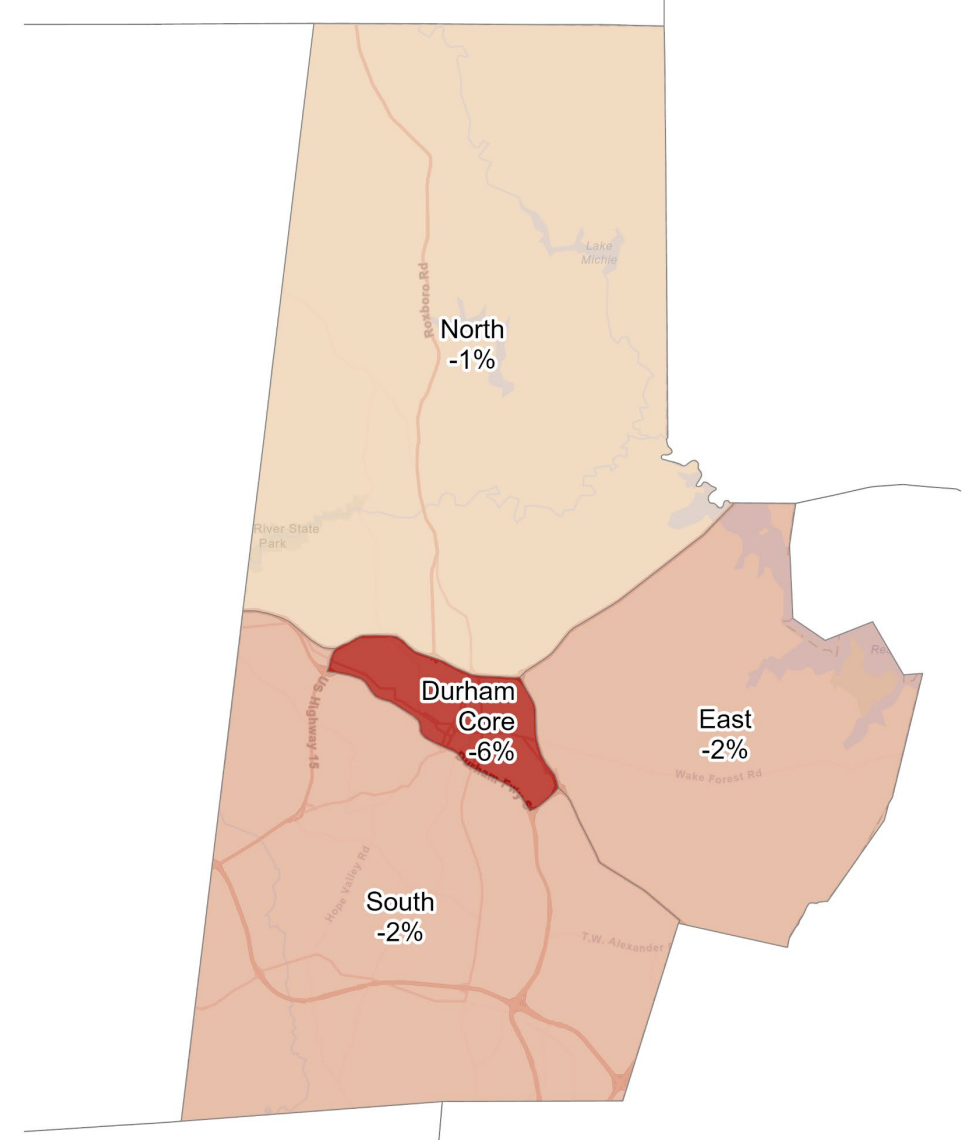


Durham Regions: Enrollment Size and Change since 2019

2024-25 Public School K-12 Enrollment (District plus Charter)

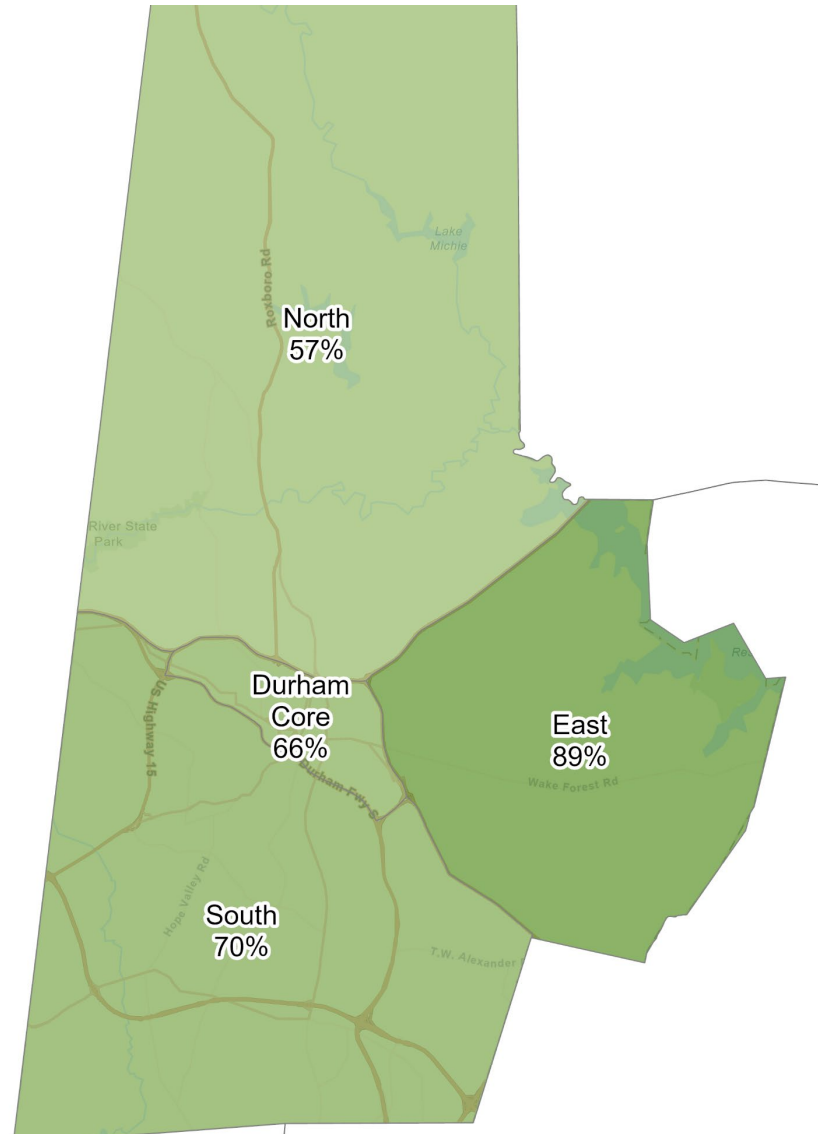


2019-20 to 2024-25 Change in Public School Enrollment

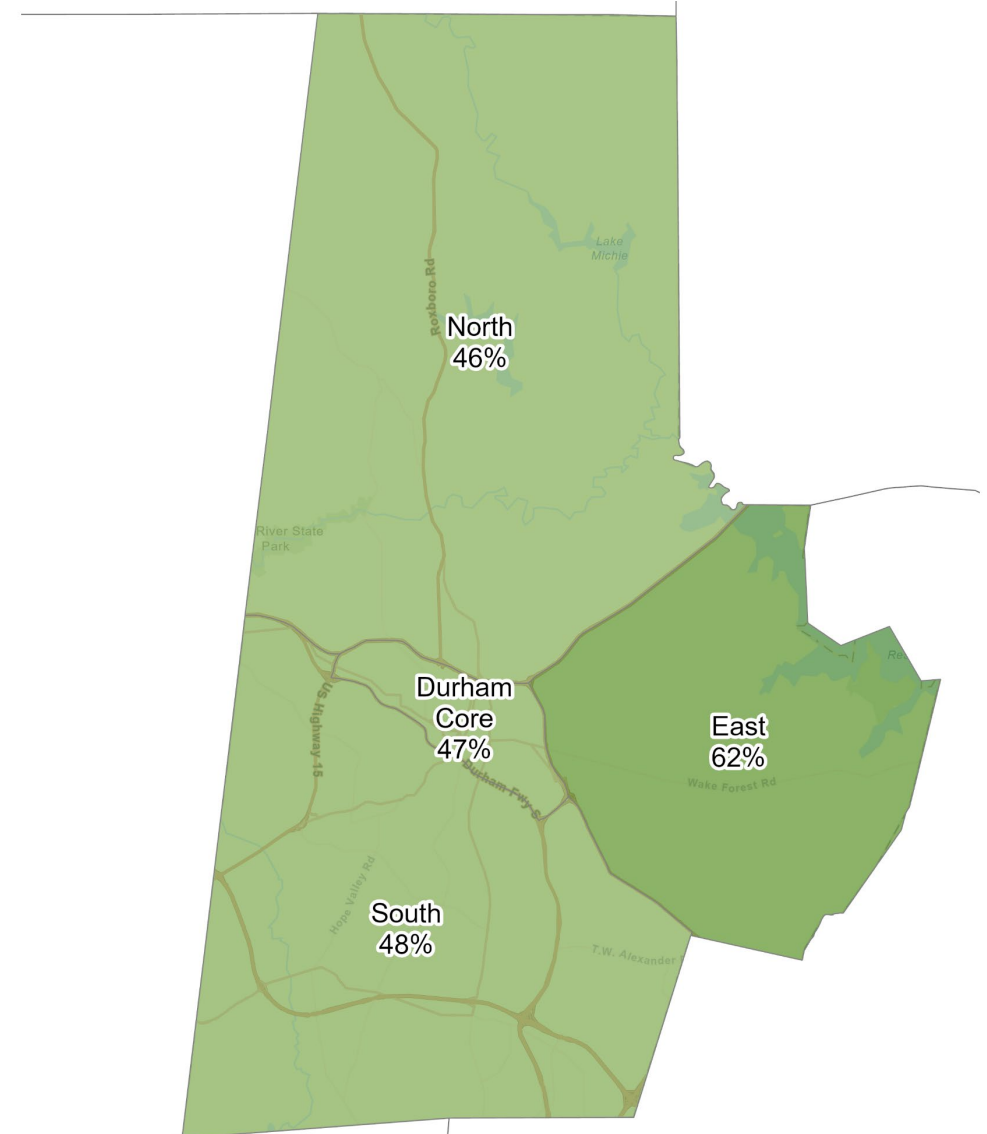


Durham Regions: Race, Ethnicity, and Socioeconomic Demographics

% of students who identify as Black, Hispanic, or Native American

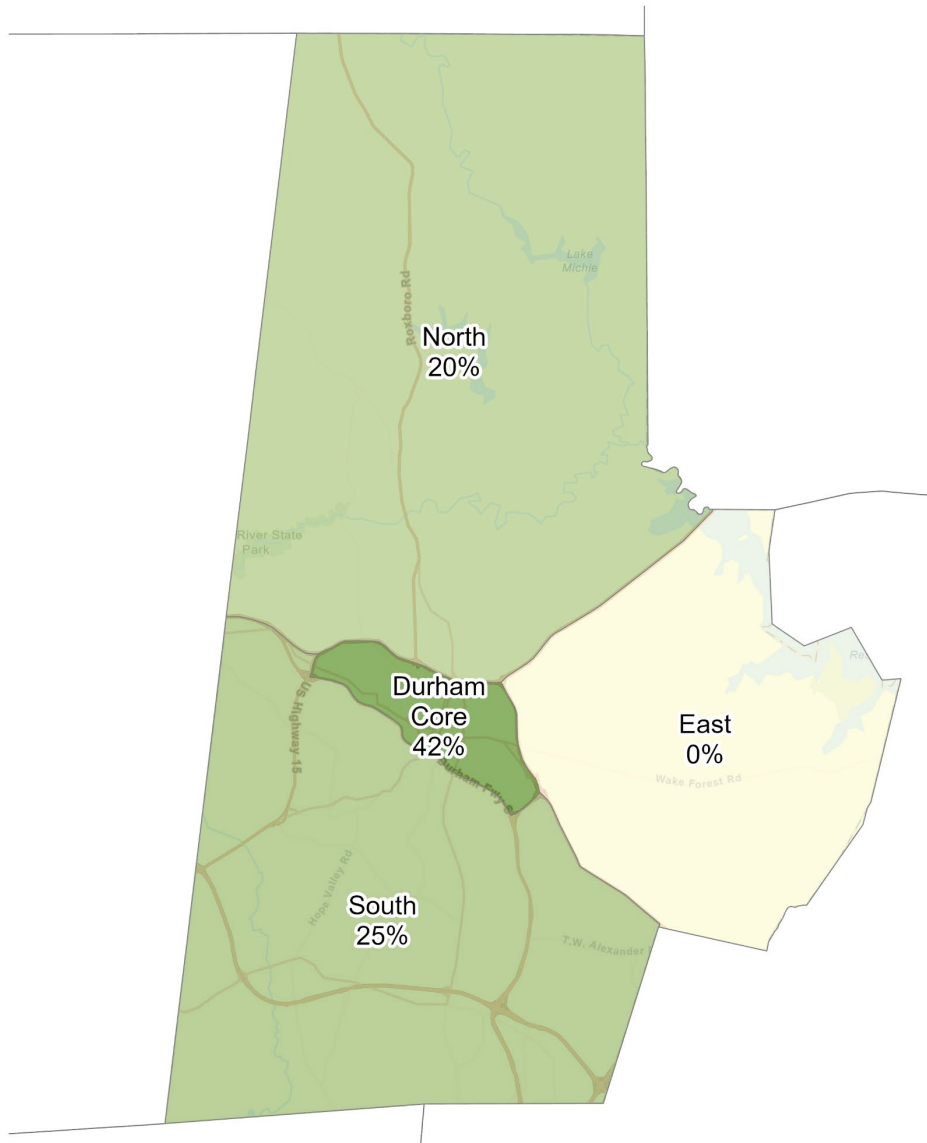


% of students who qualify as Economically Disadvantaged



Durham Regions: Academic Quality and Charter Schools

% of Students Attending A or B-rated schools



% of Students Attending a Charter School*

