Enrollment Projections for Maryland Colleges and Universities 2026-2035

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Authored by The Maryland Higher Education Commission

ENROLLMENT PROJECTIONS - MARYLAND PUBLIC COLLEGES AND UNIVERSITIES

The Maryland Higher Education Commission (MHEC) has prepared 10-year enrollment projections for Maryland public colleges and universities for Fall 2035. The projections include headcount projections for each institution, with separate analyses for full- and part-time undergraduates and, as applicable, full- and part-time graduate/professional students. Full-time equivalent (FTE) projections were calculated by applying a mathematical formula to the headcount figures. Projections have also been developed for state-funding-eligible FTE noncredit continuing education enrollments at community colleges.

These projections are produced to fulfill a regulatory charge.

The Maryland Higher Education Commission produces 10-year enrollment projections for Maryland public colleges and universities (13B.07.04.01)

> *B. The Commission shall establish annually:*
> *(2)* ***Enrollment projections to be used by the college to prepare capital construction projects.***
>
> *C. For purposes of determining the statutory limit on State financial participation in the college capital construction projects,* ***the proposed capacity of the college in number of students shall be the approved projected 10-year full-time equivalent enrollment*** *as adopted by the Commission.*

The projections model aims to answer the question "How many Marylanders may be enrolled in postsecondary education in ten years?" These projections reflect the *potential* enrollment in Maryland – the number of students Maryland public institutions need to educate ten years from now – disaggregated by segment, institution, and specific subpopulations.

These projections provide perspective to higher education policy discussions at the state level, including facilities planning, tuition and fees issues, articulation, and funding priorities. The Department of Budget and Management and the General Assembly may use the Commission's forecasts as the State's official enrollment projections.

In the model, the Commission uses separate but similar methodologies for projecting credit enrollments and FTE at community colleges and public four-year institutions. A third method is applied to produce the projections of in-state noncredit continuing education FTE enrollments at the community colleges. The projections involve the application of regression models based on a series of assumptions on the factors that may have an impact on enrollment. Full-time day equivalent (FTDE) enrollments are no longer published, as the relationship between credit-driven FTE and FTDE of each institution is assumed to be constant overtime.

For FY 2026, MHEC enrollment projections forecast that the statewide potential credit headcount enrollment will rise to 337,214 by Fall 2035, a 11.9% increase over 10 years. Public four-year institutions will experience a 9.9% increase in undergraduate enrollment and a 16.7% increase in graduate enrollment, and community colleges are estimated to observe a 12.7% increase in the next 10 years.

For FTE calculations, the projections' baseline year is Fall 2024 due to the sources of the data. Over the 10 years, public four-year institution FTE undergraduate enrollment is expected to grow 12.5% and community college credit FTE is expected to increase 21.2%. Non credit FTE at the community colleges is projected to grow 6.4%.

MARYLAND HIGHER EDUCATION COMMISSION
Enrollment Projection Model – Headcount Credit Enrollment at Public Four-Year Institutions and Community Colleges

These are the assumptions and steps used in projecting the headcount enrollments at Maryland's public four-year colleges and universities and community colleges for the 2026-2035 Report.[1]

ASSUMPTIONS

1. Enrollment among Maryland residents can be predicted by applying the historical relationship between the state's population and past in-state enrollments to future population projections.
2. The number of full-time undergraduates at both the community colleges and public four-year institutions will be affected by the trends in high school graduates.
3. Tuition increases will have an impact on full- and part-time community college enrollments.
4. The number of undergraduates at both the community colleges and public four-year campuses will be impacted by changes in the per capita disposable income, in constant dollars, of Maryland residents.
5. The ratio of in-state to out-of-state students in Maryland will be relatively constant over time.
6. The enrollment of each individual institution is determined by the projected state-wide total enrollment and the projected market share[2] of the institution in the specific segment.
7. The 10-year market share of each institution is predicted based upon the historical and actual market share for each institution over the past years.
8. The relationship between the credit hour-driven full-time equivalent enrollment (FTE) and the headcount-driven full-time equivalent enrollment of each institution is constant overtime[3].

STEPS

1. Total enrollment at Maryland's public four-year institutions from 2010 to 2025 was categorized by gender, age (11 groupings), and enrollment status (full- and part-time,

[1] These assumptions were established by the MHEC staff and expert contractor who developed the model in the 1990s.
[2] Market share is the share of enrollment of each institution to the statewide enrollment.
[3] Headcount-driven FTE and credit hour-driven FTE refer to the two different methods to calculate FTE enrollment. Headcount-driven FTE refers to the method based on the headcount enrollment of full-time and part-time students (the total number of full-time students plus one-third of the part-time students), while credit hour-driven FTE refers to the method based on the total credits taken by full-time and part-time students (total Fall semester credits divided by 15).

undergraduate and graduate/professional). Students whose age was unknown were distributed in the other age categories on a proportional basis.

2. The percentage of students who were Maryland residents was determined for each gender and enrollment group.

3. The state's population during 2010-2035 was categorized by gender and the same age groupings. The actual and projected population figures were obtained from the Maryland Department of Planning.

4. An ordinary least squares regression model was used to examine the relationship between the in-state enrollment (dependent variable) and the state's population (independent variable). This relationship was then applied to the population projections through the year 2035 to determine the projected enrollments of Maryland residents.

5. The annual projected change in the number of Maryland high school graduates was integrated into the projections model as an adjusting factor for predicting the number of full-time undergraduates. Projections for Maryland high school graduates through the year 2035 were obtained from the Western Interstate Commission for Higher Education.

6. The annual percentage change in the per capita disposable income, in constant dollars, of Maryland residents was integrated into projections as an adjusting factor for predicting the number of community college full-time enrollment this year as their coefficients are statistically significant at the 90% level. The income information was obtained from the Bureau of Economic Analysis[4].

7. Because the tuition change is not significantly correlated with the community college enrollment, this year the tuition was not integrated into the projections model as an adjusting factor.

8. The average annual change in enrollment over the past ten years was integrated into the projections model as an adjusting factor for predicting the number of enrollments of all the segments (full- and part-time, undergraduate and graduate/professional).

9. Out-of-state enrollments were projected to be consistent with the ratio of in-state to out-of-state students in the last year in which actual enrollment figures were available. Separate ratios were used for each of the gender and enrollment categories.

10. The projected market share of each institution by enrollment status (full- and part-time, undergraduate and graduate/professional) is estimated by the single exponential smoothing of the actual market share of the past ten years.

11. The projected enrollment of each institution is calculated by applying the projected market share to the projected statewide segmental enrollment.

12. The projected number of full-time equivalent students (FTES) at each public four-year institution was calculated from the headcount enrollments. This conversion was made by: 1) computing headcount-driven FTES figures for each campus for each year (the

[4] At the time the projections were conducted, the annual income per capita for 2025 had not yet been published. Instead, this year the model used the income data from the third quarter of 2025. The final annual income data will be updated when the projections for 2027 are conducted.

total number of full-time students plus one-third of the part-time), and 2) multiplying these figures by the average ratio of headcount- to credit hour-driven FTES (reported in audited institutional annual financial reports) over the past three years. A separate ratio was obtained for each college, and these ratios were applied to each year.

MARYLAND HIGHER EDUCATION COMMISSION

Enrollment Projection Model – Noncredit Continuing Education at Community Colleges

These are the assumptions and steps used in projecting the state-eligible full-time equivalent (FTE) noncredit continuing education enrollments at Maryland community colleges. The non-credit data is from fiscal documents CC-4 and the data are collected at the end of each fiscal year so there is a one year delay on the timeframe of the non-credit projections. It is assumed that noncredit continuing education enrollments at community colleges can be forecasted by past noncredit enrollments at each campus. The projected noncredit continuing education enrollment at each Maryland community college is estimated by the use of a first-order autoregressive model on the previous noncredit continuing education enrollment. [5]

[5] An autoregressive model is a model where a value from a time series is regressed on previous values from that same time series. This model used 15 years of past data (2010-2024).

Projections of Potential Enrollment at Maryland Public Four-Year Institutions

	Actual					10-Year Projections				
	Fall 25	Fall 25	Fall 25	Fall 25	FY 25[6]	Fall 34	Fall 34	Fall 34	Fall 34	FY 35
	Undergraduate headcount		Graduate headcount		FTE	Undergraduate headcount		Graduate headcount		FTE
	Full-time	Part-time	Full-time	Part-time		Full-time	Part-time	Full-time	Part-time	
Bowie State University	4,071	739	427	733	5,063	4,307	874	484	953	5,151
Coppin State University	2,022	470	141	157	1,887	2,139	543	144	219	2,586
Frostburg State University	2,396	1,040	260	369	3,090	2,535	1,057	274	480	3,123
Salisbury University	5,950	527	527	239	6,365	6,294	615	537	311	6,901
Towson University	14,613	1,748	1,115	2,201	16,068	15,459	2,066	1,130	2,862	17,347
University of Baltimore	633	785	1,041	709	2,166	670	928	1,061	922	2,368
University of Maryland, Baltimore	835	148	4,171	1,630	6,873	883	177	4,252	2,120	7,368
University of Maryland, Baltimore County	9,741	1,346	1,444	998	11,345	10,305	1,591	1,472	1,298	11,784
University of Maryland, College Park	29,87	1,996	7,940	2,475	35,133	31,608	2,357	8,226	3,219	37,450
University of Maryland Eastern Shore	2,334	361	377	306	2,829	2,469	427	400	398	3,181
University of Maryland Global Campus	13,760	40,678	1,393	10,977	41,189	14,543	48,067	1,420	14,275	51,045
Morgan State University	8,885	699	1,644	361	9,816	9,367	825	1,676	469	11,452
St. Mary's College of Maryland	1,587	33	24	0	1,764	1,679	39	20	0	1,829
Total Public Four-Year	**96,676**	**50,570**	**20,504**	**21,155**	**143,588**	**102,258**	**59,566**	**21,096**	**27,526**	**161,585**

[6] FTE, FTDE and non-credit data is from fiscal documents (e.g. annual fiscal book and CC), which are collected at the end of each fiscal year. Therefore, there is a one year delay on the timeframe of the actual values.

Projections of Potential Enrollment at Maryland Community Colleges

	Actual				10-Year Projections			
	Fall 25	Fall 25	FY 25	FY 25	Fall 35	Fall 35	FY 36	FY 36
	Undergraduate headcount		FTE	Non-credit FTE	Undergraduate headcount		FTE	Non-credit FTE
	Full-time	Part-time			Full-time	Part-time		
Anne Arundel Community College	3,093	9,019	6,985	2,079	3,885	9,746	8,301	2,492
Allegany College of Maryland	791	1,837	1,643	631	979	1,991	1,819	485
Baltimore City Community College	905	3,291	2,446	1,348	1,120	3,627	2,697	1,591
Carroll Community College	882	2,396	1,916	422	1,091	2,596	2,166	485
Community College of Baltimore County	4,647	13,045	9,764	4,393	5,749	14,104	12,269	4,237
Cecil College	599	1,272	1,053	318	735	1,378	1,320	373
Chesapeake College	427	1,823	1,119	575	530	1,921	1,307	698
College of Southern Maryland	1,957	3,395	3,403	583	2,410	3,679	4,427	629
Frederick Community College	2,021	5,483	4,297	547	2,500	5,941	5,055	510
Garrett College	406	334	453	193	502	330	630	186
Hagerstown Community College	1,403	3,830	2,855	895	1,736	4,174	3,478	768
Harford Community College	1,647	3,711	3,078	693	2,179	4,008	3,854	798
Howard Community College	2,261	6,607	5,632	1,109	2,797	7,235	6,572	1,264
Montgomery College	6,819	13,153	12,564	2,506	8,436	14,198	15,409	2,749
Prince George's Community College	3,571	8,783	7,235	3,261	4,418	9,417	8,976	3,673
Wor-Wic Community College	482	2,547	1,716	790	596	2,760	1,917	717
Total Community Colleges	**31,911**	**80,526**	**66,159**	**20,344**	**39,663**	**87,105**	**80,197**	**21,654**