Enrollment Projections

2025-2034

Maryland Public Colleges and Universities

May 2025

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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 2034. 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) and full-time day equivalent (FTDE) 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/FTDE at community colleges and public four-year institutions. A third method is applied to produce the projections of in-state noncredit continuing education

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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. The final products include FTE and FTDE enrollment figures to assist in planning capital projects on a 10-year time horizon.

For FY 2025, MHEC enrollment projections forecast that the statewide potential credit enrollment will rise to 318,604 by Fall 2034, a 9.7% increase over 10 years. Public four-year institutions will experience a 6.6% increase in undergraduate enrollment and a 13.1% increase in graduate enrollment, and community colleges are estimated to observe a 12.5% increase in the next 10 years.

MHEC has been actively monitoring the accuracy of its enrollment projections. Until FY 2023, the current projection model tended to overestimate enrollment, particularly for community colleges. This overestimation stemmed from several factors, the most significant being the model's design: it assumes a stable, long-term relationship between Maryland's population and college enrollment, relying on historical averages rather than short-term fluctuations. As such, it aims to predict the number of students who will require access to Maryland's public colleges and universities over a 10-year period for long-term capital planning.

However, this assumption has been challenged by a long-term decline in the proportion of Maryland residents enrolling in community colleges. In response to the ongoing enrollment declines in community colleges, MHEC developed an alternative model in Spring 2023 that is more responsive to recent trends. Over the past three years, MHEC has conducted counterfactual analyses annually – comparing what the alternative model would have predicted against actual enrollment data, and comparing the results to the current model. These analyses demonstrated that, the current model remains more effective for long-term capital planning. Despite the better short-term performance, the alternative model will unavoidably lead to underestimated projections. This is because the decade-long enrollment decline appeared to stabilize in Fall 2021, with community college enrollment rebounding for three consecutive years, suggesting a possible return to a steady population-to-enrollment ratio.

Given these findings, the Secretary and the Office of Facilities/Capital Budget Oversight jointly decided in Spring 2025 to continue using the original model for this year's enrollment projection report. MHEC will, however, continue monitoring enrollment patterns to reassess the applicability of the alternative model in future years.

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 2025-2034 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].

[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).

9. The relationship between the credit-driven FTE and the full-time day equivalent enrollment (FTDE) of each institution is constant overtime.
10. The impact of the COVID-19 pandemic on the temporary changes to distance education enrollments is not included in the model (e.g. as a variable or weight) because it would distort the long-term FTDE projection substantially.

STEPS

1. Total enrollment at Maryland's public four-year institutions from 2010 to 2024 was categorized by gender, age (11 groupings), and enrollment status (full- and part-time, 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 2010-2034 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 2034 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 2034 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 part-time undergraduates. The income information was obtained from the Bureau of Economic Analysis.
7. 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).
8. 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.
9. 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.

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

11. 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 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.

12. The projected number of full-time day equivalent students (FTDES) at each public four-year institution was calculated by multiplying the FTES enrollment for each campus by the average ratio of credit hour-driven FTES to FTDES over the past three years[4]. A separate ratio was obtained for each campus, 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.

ASSUMPTION

- Noncredit continuing education enrollments at community colleges can be forecasted by past noncredit enrollments at each campus.

STEP

1. 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 24	Fall 24	Fall 24	Fall 24	FY 24[6]	FY 24	Fall 34	Fall 34	Fall 34	Fall 34	FY 35	FY 35
	Undergraduate headcount		Graduate headcount		FTE	FTDE	Undergraduate headcount		Graduate headcount		FTE	FTDE
	Full-time	Part-time	Full-time	Part-time			Full-time	Part-time	Full-time	Part-time		
Bowie State University	4,309	827	495	722	5,129	4,422	4,405	957	488	890	5,215	4,496
Coppin State University	1,548	359	121	182	1,729	1,165	1,582	419	125	232	1,961	1,322
Frostburg State University	2,548	874	269	413	3,016	2,459	2,605	971	280	509	3,154	2,571
Salisbury University	5,830	458	465	272	6,253	5,476	5,960	533	480	336	6,467	5,663
Towson University	14,415	1,849	1,047	2,090	16,117	13,479	14,736	2,128	1,084	2,577	16,454	13,761
University of Baltimore	663	814	988	767	2,201	1,070	678	936	1,021	946	2,329	1,133
University of Maryland, Baltimore	797	163	4,003	1,673	6,775	5,110	815	191	4,136	2,063	7,057	5,322
University of Maryland, Baltimore County	9,421	1,368	1,926	1,255	11,378	9,166	9,631	1,574	1,990	1,556	11,812	9,516
University of Maryland, College Park	29,225	1,908	8,115	2,477	34,087	31,078	29,875	2,210	8,371	3,054	35,916	32,745
University of Maryland Eastern Shore	2,256	211	427	269	2,582	1,958	2,306	243	423	332	3,007	2,280
University of Maryland Global Campus	12,636	39,551	461	10,364	38,547	N/A	12,854	45,498	300	12,779	45,603	N/A
Morgan State University	8,376	651	1,399	313	9,314	7,278	8,562	748	1,446	386	10,443	8,161
St. Mary's College of Maryland	1,593	37	14	0	1,714	1,599	1,628	43	15	0	1,743	1,626
Total Public Four-Year	93617	49070	19730	20797	138,842	84,259	95,637	56,451	20,159	25,661	151,161	88,596

[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 24	Fall 24	FY 24	FY 24	FY 24	Fall 34	Fall 34	FY 35	FY 35	FY 35
	Undergraduate headcount		FTE	FTDE	Non-credit FTE	Undergraduate headcount		FTE	FTDE	Non-credit FTE
	Full-time	Part-time				Full-time	Part-time			
Anne Arundel Community College	2,984	8,497	6,413	4,301	1,946	3,760	9,088	7,710	5,170	2,395
Allegany College of Maryland	822	1,963	1,646	1,061	584	1,035	2,093	1,868	1,204	465
Baltimore City Community College	840	3,535	2,255	1,369	1,006	1,057	3,716	2,568	1,559	1,331
Carroll Community College	909	2,428	1,821	1,323	419	1,144	2,588	2,190	1,592	487
Community College of Baltimore County	4,144	12,395	9,539	5,459	3,972	5,216	13,224	11,103	6,354	4,216
Cecil College	505	1,244	1,068	730	279	636	1,326	1,177	804	351
Chesapeake College	429	1,666	1,075	690	623	557	1,719	1,253	805	710
College of Southern Maryland	1,859	3,203	3,292	2,010	529	2,311	3,414	4,021	2,455	606
Frederick Community College	1,966	5,327	3,779	2,144	608	2,474	5,679	4,793	2,718	513
Garrett College	355	323	444	325	203	447	293	544	398	187
Hagerstown Community College	1,357	3,731	3,001	1,844	857	1,708	4,007	3,435	2,111	753
Harford Community College	1,573	3,494	2,997	1,992	642	2,099	3,767	3,636	2,417	761
Howard Community College	2,177	6,519	5,460	3,690	1,114	2,740	7,004	6,185	4,180	1,274
Montgomery College	6,546	12,289	11,748	8,368	2,713	8,239	13,124	14,566	10,375	2,784
Prince George's Community College	3,286	8,362	6,673	3,176	2,866	4,136	8,872	8,395	3,995	3,624
Wor-Wic Community College	459	2,482	1,437	970	727	578	2,646	1,748	1,180	709
Total Community Colleges	30,211	77,458	62,648	39,453	19,088	38,137	82,559	75,192	47,317	21,170