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# WAKE COUNTY PUBLIC SCHOOL SYSTEM: 10 YEAR STUDENT MEMBERSHIP FORECAST

*School Year 2025-2026*

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Demographic  
Analytics Advisors

CAROLINA  
**DEMOGRAPHY**



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POPULATION CENTER

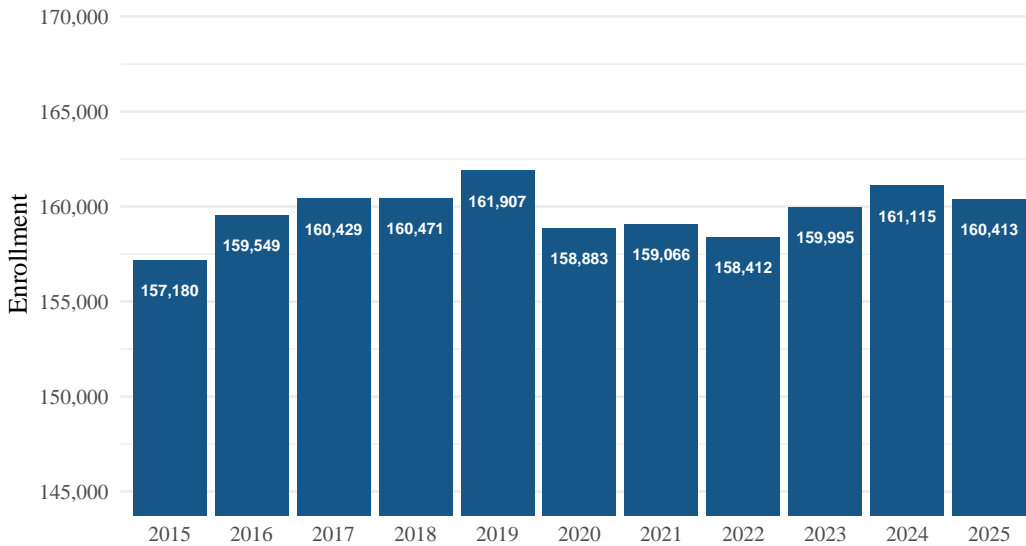
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## Executive Summary

Average Daily Membership (ADM) for Wake County Public School System (WCPSS) decreased by 702 students (-0.436%) in 2025-26 versus the 2024-25 ADM, after an increase last year. Declines were seen across all grades except 4, 6, 7, and 11 with grade 4 recording the highest increase of 559 students. ADM across K-5 grades and 9-12 grades were down by 524 and 390 as compared to last year, whereas grades 6-8 recorded an increase in ADM by 212 as compared to last year.

**Figure 1. Student Membership by School Year**  
2013–14 to 2025–26



*2020–21 and 2021–22 school years were adjusted for anomalous attendance violations.*

Wake County (billing) charter school enrollments reversed their trajectory for the first time in the last decade (since 2015-16), declining by 278 or -1.47% between 2024-25 and 2025-26. Private school enrollments decreased in 2024-25, the last year for which data are currently available, as compared to the prior school year. This trend is expected to have reversed in 2025-26, which we will see in July when data are released. This likely increase is due to the full implementation and increased funding of the Opportunity Scholarship Program. Home school enrollments continued to increase in 2024-25 (the most recent data available) for the second consecutive school year. During 2024-25, the number of home school students in Wake County increased by 429 or 2.86% from 2023-24, while the number of private school enrollments decreased 792 or -3.53%.

The new private school voucher law, which triples the budget of the Opportunity Scholarship Program and removes income and prior public school enrollment restrictions, raises new uncertainty. Further, the impact of the change in immigration policy at the federal level is expected to cause a slowdown in international migration leading to an impact on school enrollments. While the magnitude of the impact from both these factors remains unknown due to limitations in data availability, state-level data and historical trends suggest both could substantially impact WCPSS enrollments.

Historical precedent suggests that private school enrollment shifts are supply-constrained. While early fund-

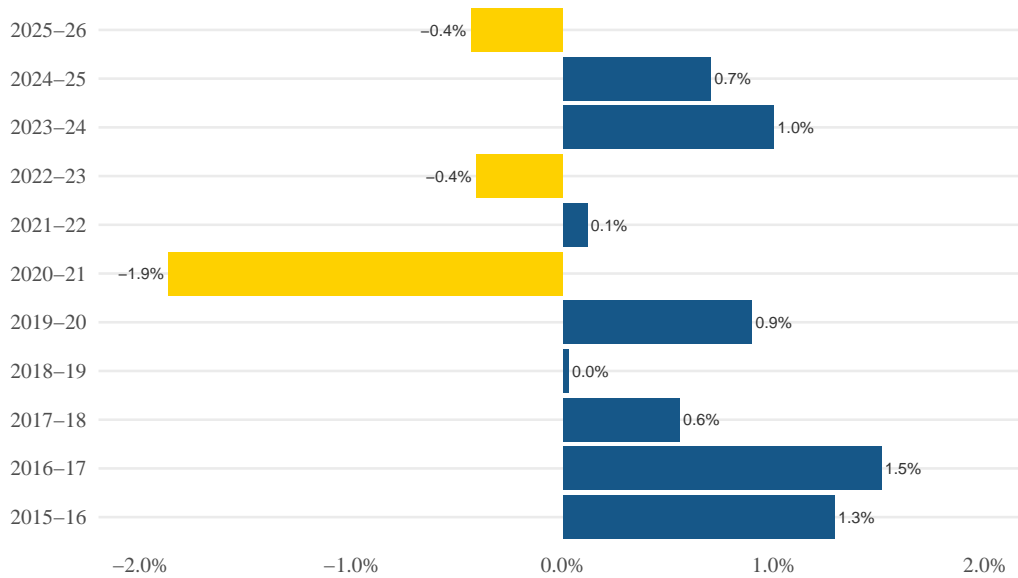
ing increases primarily subsidize the existing private school student population, enrollment growth is contingent upon the capacity of private schools in and around the County. Further, Long-term private school enrollment growth will be contingent upon expansion of private school capacity in and around the county. We are continuing to assess the incoming data on private school enrollment trends to determine if additional changes need to be made in the forecast in the future.

Additionally, the Vintage 2025 Population Estimates released by the U.S. Census Bureau in January 2026 reported a historic decline in net international migration into the U.S. At the state level, North Carolina (among other states) also recorded a decline by 43% as compared to 2024. While international migration data for the county is yet to be released, it is expected that the decline in international migration will also trickle down at the county level including Wake County. In the previous years, Wake County has contributed close to 20% of international migration into the state.

The ten-year forecast was made with the following assumptions:

- Individuals who are currently enrolled in alternative schooling options (home school, charters, and privates) will stay in these options.
- Births in Wake County will have small but steady increases, reflecting continued population growth.
- No new assumptions were made about increases in private school enrollment, beyond the current growth trends. However, we are noticing changes in grade progression ratios (GPRs) that are likely due to both private school enrollment increases in the current year and decreases in net international migration.
- Home sales and building permits have generally leveled out, thus we are not including any new assumptions about impacts on school enrollment based on these trends.

**Figure 2. Percent Change in Student Membership Growth**  
2013–14 to 2024–25



The 2025-26 WCPSS forecast predicts a 2026-27 Month 2 K-12 ADM of 48 students over the 2025-26 Month 2 ADM, a marginal increase of 0.03%. While the gain in Month 2 K-12 ADM is predicted after a decline of 702 reported in 2025-26, it is lower than the gains reported historically, especially pre-COVID and post-COVID rebound. Over the next ten years, WCPSS is forecasted to gain 2,634 students overall (1.6%) by 2035-36.

## Statewide Trends

At the statewide level, enrollment decreased by 23,453 or -1.714%. As we can see below, Wake County Public School System (WCPSS) is also decreasing in enrollment, but at a slower rate. At the LEA level:

- 8 LEAs had increased enrollment in 2025-26 compared to 2024-25.
- 107 LEAs had decreased enrollment in 2025-26 compared to 2024-25.

The only large comparative school district that saw marginal increases was Johnston County Public School (1 student / 0.0%). All other large or comparative school districts recorded a decline in enrollment in the current school year as compared to the previous one. Granville County Schools and Durham Public School observed the **highest percentage decline** in enrollments in the current school year compared to the prior year (413 students / -6.6% and 1,287 students / -4.1% respectively).

**Table 1. ADM Changes, 2025-26 vs. 2024-25, Selected LEAs**

	2024-25	2025-26	Change	Percentage Change
<b>North Carolina Total</b>	<b>1,368,531</b>	<b>1,345,078</b>	<b>-23,453</b>	<b>-1.7%</b>
Johnston County Public Schools	37,030	37,031	1	0.0%
<b>Wake County Schools</b>	<b>161,115</b>	<b>160,413</b>	<b>-702</b>	<b>-0.4%</b>
Franklin County Schools	7,855	7,813	-42	-0.5%
Harnett County Schools	19,844	19,669	-175	-0.9%
Nash County Public Schools	12,973	12,758	-215	-1.7%
Charlotte-Mecklenburg Schools	141,726	139,328	-2,398	-1.7%
Chatham County Schools	8,790	8,640	-150	-1.7%
Guilford County Schools	66,055	64,718	-1,337	-2.0%
Cumberland County Schools	48,374	47,107	-1,267	-2.6%
Orange County Schools	6,908	6,716	-192	-2.8%
Chapel Hill-Carrboro City Schools	11,099	10,758	-341	-3.1%
Winston Salem / Forsyth County Schools	50,550	48,985	-1,565	-3.1%
Durham Public Schools	31,024	29,737	-1,287	-4.1%
Granville County Schools	6,273	5,860	-413	-6.6%

Source: Month 2 ADM. Principal's Monthly Report, NC DPI and WCPSS Technology

## Long-Range Forecast: Assumptions & Threats to Model

Making accurate school enrollment projections relies on two key elements: high-quality input data and accurate forecasts of future trends, such as births and migration. When past trends are relatively stable, it is generally easier to forecast the future from the past. Rapidly changing local contexts – and deviations from historical norms – increase the challenge of producing accurate forecasts.

There are three areas that we continue to watch in terms of potential threats to the long-range forecast:

1. Full implementation of the private school voucher program which is likely to increase private schools' market share.
2. Changes in national immigration policy, which is expected to result in negative net international migration at the county level.
3. Lower birth rates during the COVID years (2020-2021), which will reduce incoming kindergarten cohorts and create cascading declines in future grades.

The local context has always been dynamic, with steady population growth, strong economic growth, declining fertility rates<sup>1</sup>, and changing market share. The global pandemic caused by COVID-19 was an unprecedented event, with no historical precedent as a point of reference. We saw significant disruptions to trends at the start of the 2020-21 school year through the 2021-22 school year. These disruptions had started to stabilize but given how charter school governance has changed, the change in the legislative landscape

<sup>1</sup>Fertility rates are the number of births per women 1,000 women ages 15 to 44. While the fertility rate has been declining, the number of births in Wake County are projected to increase. This may seem counterintuitive, but this difference is due to steady increases in the size of the population of women 15 to 44 in Wake County and projected continued increases in this population in the near term.

around private school vouchers, and changes in federal immigration policy, we expect market share trends moving in favor of private schools, at least in the short term:

- WCPSS lost 4,234 students in 2020-21 compared to 2019-20 (-1.9%). Enrollments rebounded by 183 or 0.1% in 2021-22, but this rebound did not make up for the decline in 2020-21<sup>2</sup>. In the 2022-23 school year WCPSS enrollments declined by 654 students or 0.4%, dropping enrollment to a new post-pandemic low. In 2023-24 we saw a rebound of 1,583 students, or 1%, and in 2024-25 we have seen a smaller increase of 1,120, or 0.7%. In 2025-26, there was a decrease of 702 students or -0.4%.
- No new charter school openings occurred in the current school year. Overall charter school enrollment for 2025-26 declined by 278 students or -1.47%. This is the first time since 2008-09 that enrollments have dropped in charter schools and the magnitude of the drop was the largest since 1998-99. In 2024-25, charter schools reported a 10.1% increase in enrollment, that is 1,733 more students than 2023-24.
- Data for home school enrollments was only available for 2024-25. An increase for the two consecutive years of 1,106 (7.3%) and 469 (2.9%) was recorded in 2023-24 and 2024-25 after home school enrollments reported a loss of 399 students or -2.8% year-over-year in 2022-23.
- Private school enrollments (data for which is also only available through 2024-25) reported an increase of 714 or 3.3% in 2023-24 but declined by 792 (-3.5%) in 2024-25.

COVID-19 pandemic-era disruptions forced unprecedented parental involvement in education. Increased insight into curriculum and instruction may have changed their expectations of public education. Additionally, the effects of the private school voucher program with expanded program eligibility in 2023-24 and full effects being visible starting in 2025-26, will likely be seen in increases in private school enrollments in the coming year. Changing expectations and new opportunities may lead families to continue to choose nonpublic instruction in the future unless public instruction adapts to these new expectations of greater flexibility and individualized instruction<sup>3</sup>.

Finally, the COVID-period decline in births will translate into smaller incoming kindergarten cohorts, producing reduced cohort sizes that progress through each grade and causing cascading enrollment declines over time—unless offset by increased net migration.

## **Impacts of Market Share Changes on Enrollments**

### **Market Share Trends, 2014-15 to 2024-25**

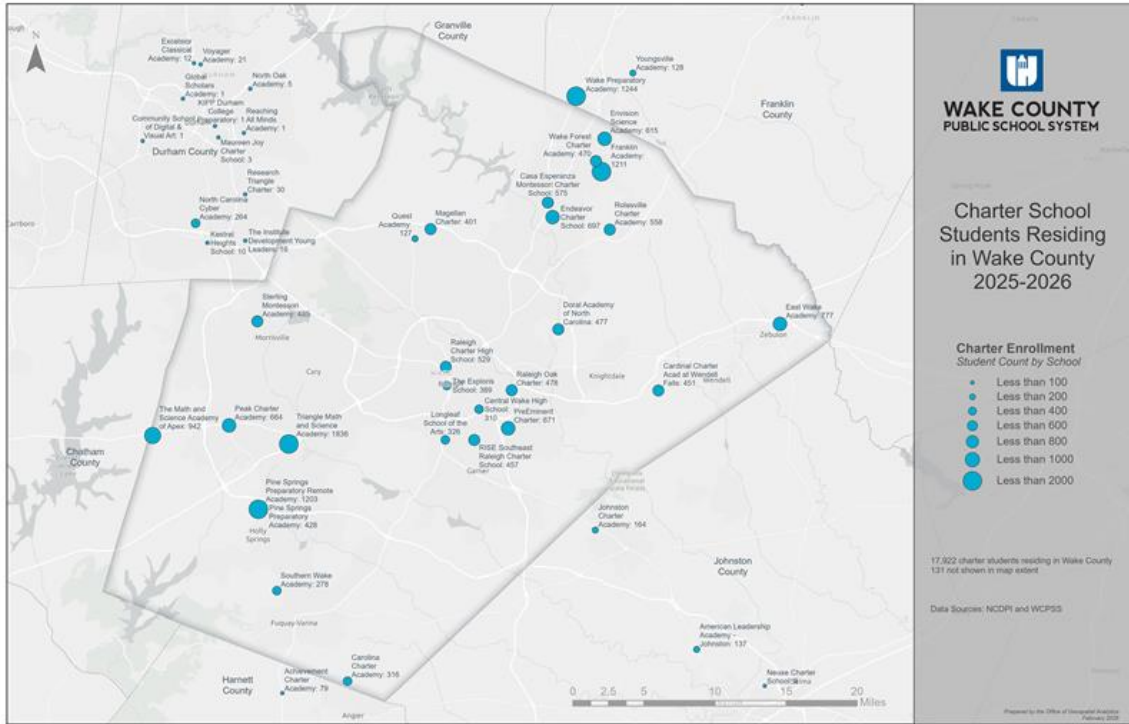
Between 2014-15 to 2024-25, WCPSS enrollment grew by 5,931 students, an increase of 3.8%. At the same time, the total number of K-12 students in Wake County, including WCPSS, charter schools (Wake billing), private schools, and home schools, grew by 26,078 or 14%, to reach a total number of students in Wake County of 217,156 in 2024-25.

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<sup>2</sup>These comparisons are based on violation-adjusted ADM for 2020-21 and 2021-22, as attendance patterns remained strongly influenced by COVID-19. When comparing non-violation adjusted ADM, WCPSS lost 4,234 students in 2020-21 compared to 2019-20 (-2.6%). Non-violation adjusted enrollments rebounded by 1,087 or 0.7% in 2021-22.

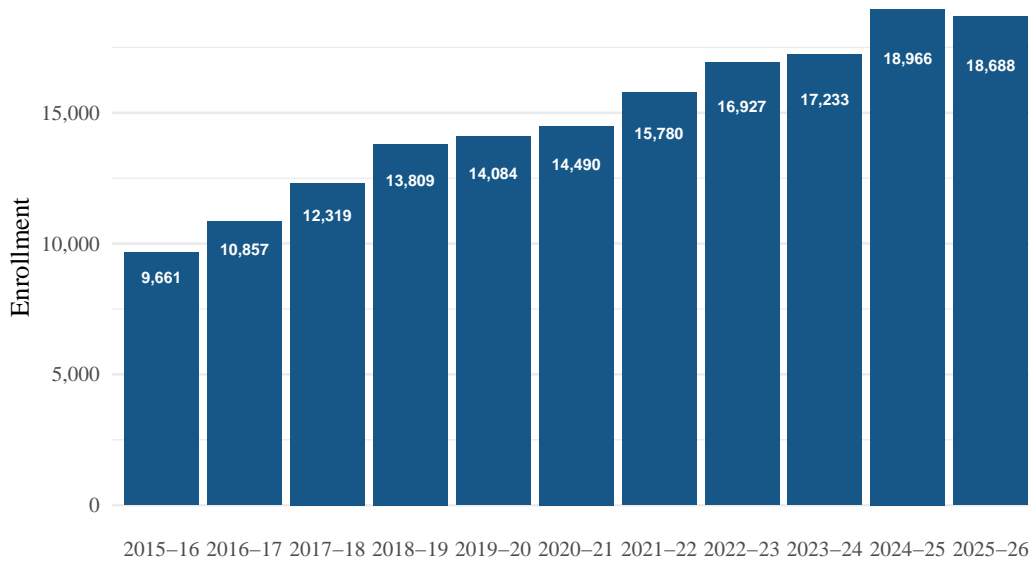
<sup>3</sup>Hill, Paul T. and Ashley Jochim. October 29, 2020. "Can public education return to normal after the COVID-19 pandemic?" Brown Center Chalkboard (blog). Retrieved January 12, 2021, from <https://www.brookings.edu/blog/brown-center-chalkboard/2020/10/29/can-public-education-return-to-normal-after-the-covid-19-pandemic/>.

WCPSS market share—the percentage of K-12 enrollments occurring at Wake County Public Schools—dropped over seven percentage points over this period, from 81.2% to 74.2%. Market share declined most significantly between 2019-20 and 2020-21, dropping 1.8 percentage points from 77.6% to 75.8%.



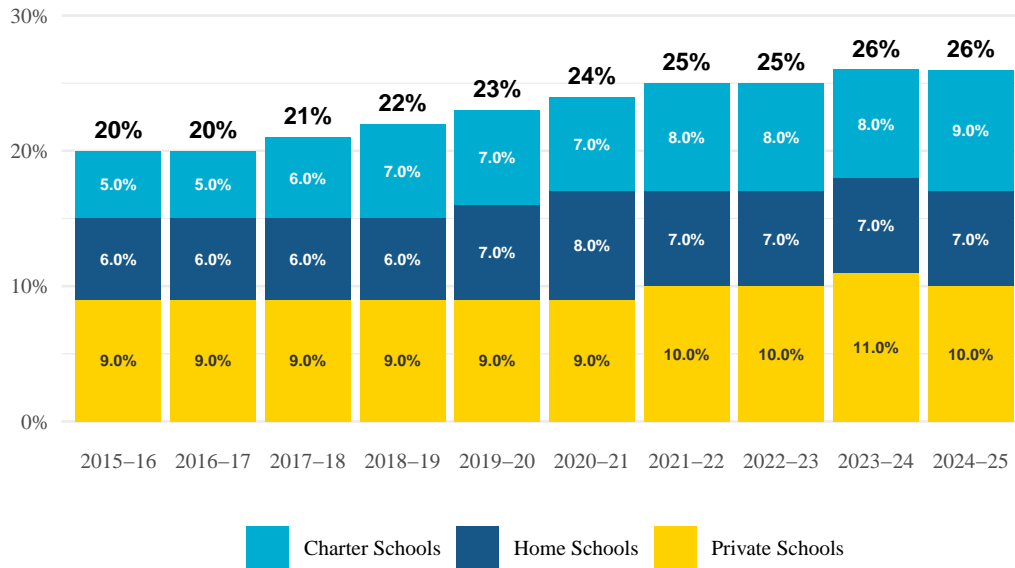
Over the past ten years, charter school, home school, and private school enrollments grew faster than WCPSS enrollments (except in 2024-25 where private school enrollments reported a decline of 4%). WCPSS’s shifting market share reflects the following dynamics:

**Figure 3. Charter Billing Change**  
 2015–16 to 2025–26



- **Rapid expansion of charter schools:** Between the 2014-15 to 2024-25 school years, Wake charter school enrollments almost doubled, rising from 8,555 to 18,966, an increase of 121.7%. Charter school market share rose from 4.5% to 8.7% over this time. Charter school enrollment (according to billing data) declined to 18,688 in the current school year from 18,966 in 2024-25, the first decline in well over a decade. This lends credence to the impact of both migration changes and increases in private schooling that we will likely see in future data.
- **Growth of home schools:** Between 2014-15 to 2024-25, home school enrollments in Wake County grew from 10,407 to 15,454, an increase of 48.5%. Home school market share rose from 5.4% to 7.1% over this time.
- **Steady growth in private school enrollments:** Between 2014-15 to 2024-25, private school enrollments rose from 16,932 to 21,621, an increase of 4,689 or 27.7%. With this growth, private schools regained market share from their post-Great Recession low of 8.7% in 2013-14. As of 2024-25, they were at 10.0%. We do not yet have data for the current school year, but expect that enrollment will be increased.

**Figure 4. Market Share of Non-WCPSS Schools**  
2015–16 through 2024–25



**Private School Growth and Implications for Future Market Share**

WCPSS enrollments declined by 702 compared to last year (-0.4%). This decline followed a gain for two consecutive years in 2023-24 and 2024-25, and is similar in size to the decline in 2022-23. Over the last 10 years (excluding COVID years), while WCPSS enrollments have averaged a year-over-year growth of 1%, private and charter schools enrollments recorded an average 2% and 11%. However, the impact of the new law expanding private school vouchers could put private school enrollments on a higher growth trajectory. If the increased utilization of private school options is accompanied by growth in charter schools, WCPSS market share may decline further. We will not know the magnitude of private school enrollments until the 2025-26 data is released from the Division of Non-Public Education at the NC Department of Administration. Additionally, the full impact of the new law will be realized only after the largest increases in funding occur in the 2026-27 School Year.

**Kindergarten Enrollments Remain Below Expectations**

The birth to kindergarten ratio is the number of students who enter WCPSS kindergarten divided by the number of births in Wake County five years prior. During 2010-11, this ratio was 0.947, meaning that the kindergarten class entering WCPSS was 94.7% of the births to Wake County mothers in 2005. This indicates a combination of any one of the following factors: more resident families with children born in the county were moving away from Wake County before their child entered kindergarten; lower net in-migration of families with young children to Wake County; or families with kindergartners being less likely to enroll their children in WCPSS.

**Table 2. ADM Changes, Historical Birth to Kindergarten Ratios**

Birth Year	Resident Births	School Year Entering Grade K	Actual WCPSS Grade K Enrollment	Birth to Kindergarten Ratio
2008	13,542	2013-14	12,213	0.902
2009	13,010	2014-15	12,065	0.927
2010	12,705	2015-16	11,860	0.933
2011	12,458	2016-17	11,855	0.952
2012	12,309	2017-18	11,664	0.948
2013	12,439	2018-19	11,416	0.918
2014	12,635	2019-20	11,819	0.935
2015	12,867	2020-21	10,438	0.811
2016	13,019	2021-22	11,233	0.863
2017	12,683	2022-23	10,963	0.864
2018	12,580	2023-24	11,053	0.879
2019	12,689	2024-25	11,052	0.871
2020	12,552	2025-26	10,896	0.868

*Source: Month 2 ADM. Principal's Monthly Report, NC DPI and WCPSS Technology and North Carolina State Center for Health Statistics*

The birth to kindergarten ratio dropped significantly post pandemic and is yet to bounce back. In the previous years, the continued net in-migration of families with young children was offsetting the decline in kindergarten enrollments that could have resulted from the drop in birth to kindergarten ratio. However, the recent changes in immigration policy, which have resulted in decline in net migration at the state level, is expected to also impact migration at the county level, resulting in a larger decline in kindergarten enrollments in the future.

Between 2015-16 and 2019-20, the average birth to kindergarten ratio was 0.938. This ratio dropped to 0.811 in 2020-21, the lowest ratio observed in WCPSS over the past 21 years. The ratio rebounded to 0.863 in 2021-22, 0.864 in 2022-23, and 0.879 in 2023-24, but in 2024-25 and 2025-26 the ratio declined to 0.871 and further to 0.868, respectively.

If historical ratios had held in 2025-26, WCPSS would have expected 11,773 kindergartners; instead, there were 11,162 enrolled. As kindergarten is not mandatory, parents may still be withholding children from kindergarten or sending them to private, home, or charter schools.

### **Grade-Level Enrollments**

WCPSS system-wide losses in 2025-26 were driven by declines in enrollments across most of the grades, especially grades one, three, nine, and twelve. Despite this overall decrease compared to last year, WCPSS enrollments in grade four, six, seven, and eleven increased. The largest increase was in grade four (559) and the largest decrease was reported in grade three (345).

Overall, grades K-5 had lower enrollments in 2025-26 compared to 2024-25 (524 fewer students or -1%). Grades 6-8 showed the only aggregate gain (212 more students or 1%). Significant declines in enrollments

**Table 3. WCPSS Changes in Membership, 2025-26 vs. 2024-25****Membership by Grade**

	2024-25	2025-26	Net Gain	Percentage Change
K	11,052	10,896	-156	-1.4%
1	11,437	11,162	-275	-2.4%
2	11,725	11,593	-132	-1.1%
3	12,211	11,866	-345	-2.8%
4	11,774	12,333	559	4.7%
5	12,059	11,884	-175	-1.5%
6	11,784	12,116	332	2.8%
7	11,950	12,050	100	0.8%
8	12,357	12,137	-220	-1.8%
9	14,778	14,496	-282	-1.9%
10	13,830	13,722	-108	-0.8%
11	13,225	13,462	237	1.8%
12	12,933	12,696	-237	-1.8%
Total	161,115	160,413	-702	-0.4%

Source: Month 2 ADM. Principal's Monthly Report, NC DPI and WCPSS Technology

**Membership by Level**

	2025-26	2024-25	Net Gain	Percentage Change
K-5	69,734	70,258	-524	-0.7%
6-8	36,303	36,091	212	0.6%
9-12	54,376	54,766	-390	-0.7%
Total	160,413	161,115	-702	-0.4%

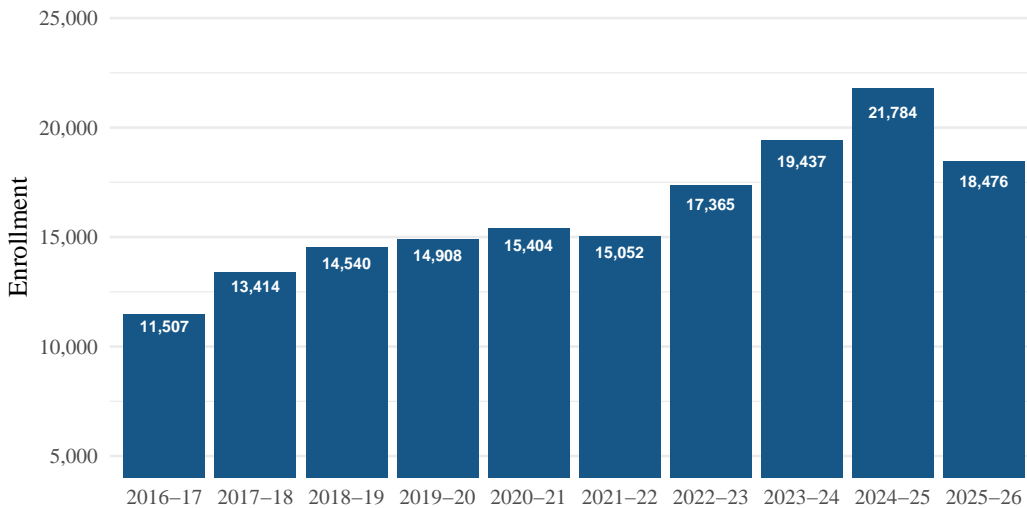
Source: Month 2 ADM. Principal's Monthly Report, NC DPI and WCPSS Technology

in grade nine and twelve contributed to the decline in overall enrollments in WCPSS high schools by 390 or 1%.

**English Language Learners**

Since migration data from the U.S. Census Bureau tend to lag (see below), we have added an analysis of the English Language Learner (ELL) population as a proxy to understand potential migration changes for the foreign-born population. In 2025-26, WCPSS recorded a significant decrease in its English Language Learner (ELL) population, dropping by approximately 3,000 students to 18,476, the first such substantial decline in the last decade. Likewise, ELL headcounts at the State-level declined by 15,513 in 2025-26 reaching 163,715 students. Given that ELL numbers are correlated with international migration trends, this reduction is likely a consequence of shifts in national immigration policy, indicating a decline of inflows and increase in outflows.

**Figure 5. Headcount of English Language Learners: 2016–17 through 2025–26**



*Data Source: Headcount of Limited English Proficient Students, Report to the North Carolina General Assembly, NC DPI*

### Attendance Violations

As we see in the table on the next page, WCPSS had 402 enrolled students in violation of attendance policies for Month 2 of the 2025–26 school year, which is still elevated compared to years prior to COVID-19. In those prior years, the number of students in violation ranged from 121 to 166, averaging 138 per year.

In school years 2020–21 and 2021–22 we adjusted ADM based on these excess violations to make sure that a one to two year dip did not significantly impact the forecast. In 2022–23 the number of violations decreased significantly to 269, still above the historical baseline, but much closer. We stopped applying the adjustment in that year. Since then we have continued to stay at this elevated level, and even ticked up slightly. We are still not applying an adjustment, but excess violations compared to historical averages continues to be something for the team to keep its eyes on.

### Impacts on Fertility

During the first year of the COVID-19 pandemic, there was significant speculation about its impact on fertility. In June 2020, some scholars predicted as much as a 15% decline in births<sup>4</sup>, reflecting economic uncertainty and the challenges of navigating childcare, work, and schooling during a pandemic<sup>5</sup>. This estimate

<sup>4</sup>Kearney, Melissa S., and Phillip B. Levine. June 15, 2020. “Half a million fewer children? The coming COVID baby bust.” Washington, DC: Brookings. Retrieved July 5, 2021, from <https://www.brookings.edu/research/half-a-million-fewer-children-the-coming-covid-baby-bust/>.

<sup>5</sup>Dockterman, Eliana. October 15, 2020. “Women Are Deciding Not to Have Babies Because of the Pandemic. That’s Bad for All of Us.” Time. Retrieved December 5, 2020, from <https://time.com/5892749/covid-19-baby-bust/>.

**Table 4. WCPSS Members in Violation, 2015-16 through 2025-26**

School Year	WCPSS Members in Violation
2015-16	166
2016-17	128
2017-18	142
2018-19	135
2019-20	121
2020-21	1,348
2021-22	442
2022-23	269
2023-24	374
2024-25	339
2025-26	402

Source: Month 2 ADM. WCPSS Technology

was later revised downwards, based on a faster than expected economic recovery, but most experts were still predicting lower levels of births<sup>6</sup>. These predictions appear to be true for 2020, but may not hold beyond that year. 2021 saw increased births, and both 2022 and 2023 saw small decreases in births. We are estimating an increase in births for 2024, but those data are not yet final.

In Wake County, there were 12,514 births in 2020, a decrease of 175 or -1.4% from 2019. This is smaller than the year-over-year decrease in births observed statewide (-3.0%).

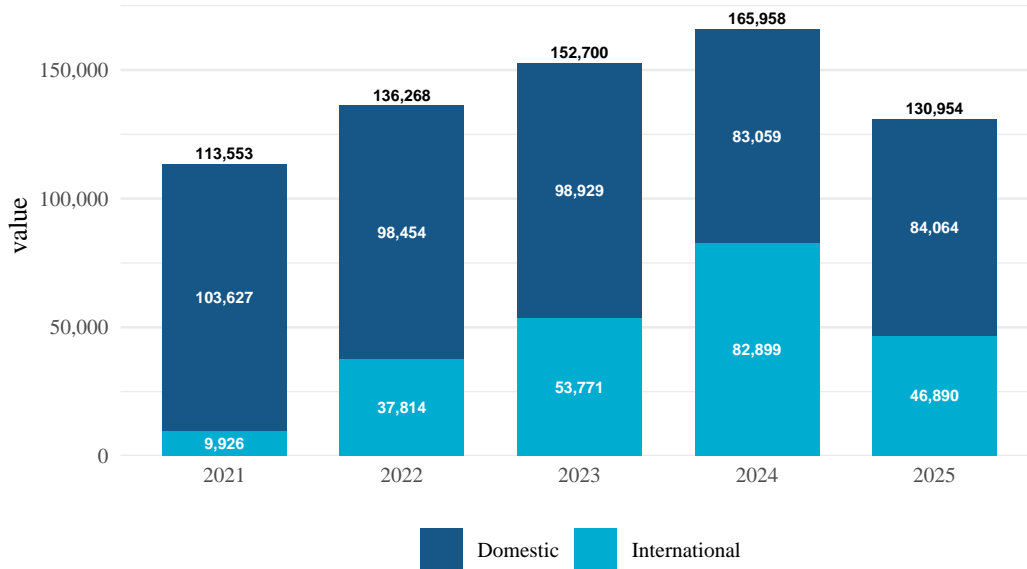
During 2021, there were 13,168 births to Wake County residents, and during 2022 there were 13,145 births to Wake County residents. During 2023 there were 12,950 births to Wake County residents, while in 2024 there were 13,348. During the first 6 months of 2025, there were 6,470 births in Wake County. This number is slightly lower than in 2024 (6,502 births). In the past five years, about 48% of Wake County births occurred in the first six months of the year; extrapolating these trends to 2025 suggests a total of 13,328 births for the year, second only to the 13,348 births in 2024 which had the highest number of births since 2008. These trends indicate that the impact of COVID-19 has been unique and is not expected to have the same impact on fertility that we saw during the Great Recession, especially in counties, like Wake, where economic indicators remain strong.

## Impacts of Migration

Changes in migration have the potential to have larger, more immediate impacts on the school system than births. 2025 Vintage Census Bureau's Population Estimates show that net international migration in the U.S. declined from 2.7 million to 1.3 million between July 2024 to June 2025. Similarly, at the state level, every state, including North Carolina reported a lower net international migration between these two time periods.

<sup>6</sup>Kearney, Melissa S., and Phillip B. Levine. December 17, 2020. "The coming COVID-19 baby bust: Update." Washington, DC: Brookings. Retrieved January 13, 2021, from <https://www.brookings.edu/blog/up-front/2020/12/17/the-coming-covid-19-baby-bust-update/>.

**Figure 6. Net Migration in North Carolina**

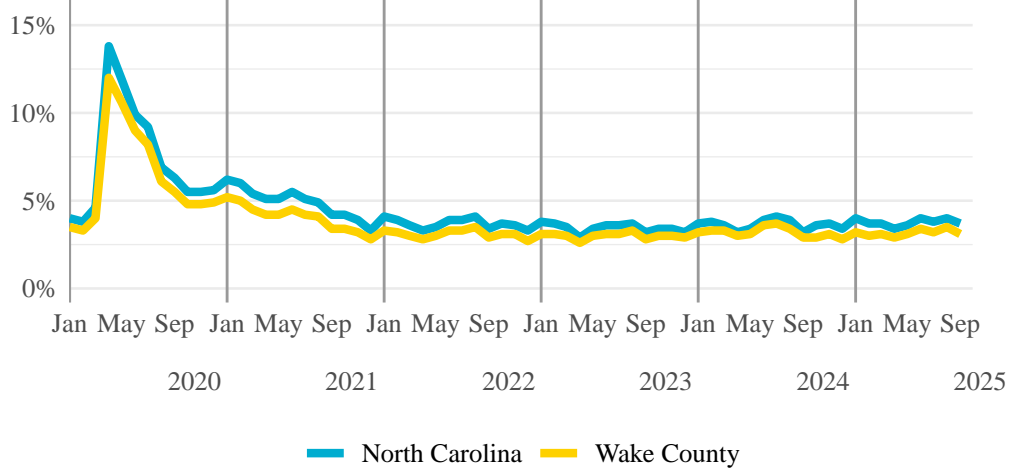


Source: 2025 Vintage Population Estimates, U.S. Census Bureau

Economic indicators in Wake County remain strong: Wake County’s unemployment rate has been consistently lower than the state average. Both Wake County and North Carolina’s unemployment rates increased significantly in April and May of 2020 during the first COVID-19 lockdown and have since declined to pre-COVID levels. As of September 2025, Wake County’s unemployment rate was 3.1%, similar to the unemployment rate in February 2020 (2.9%).

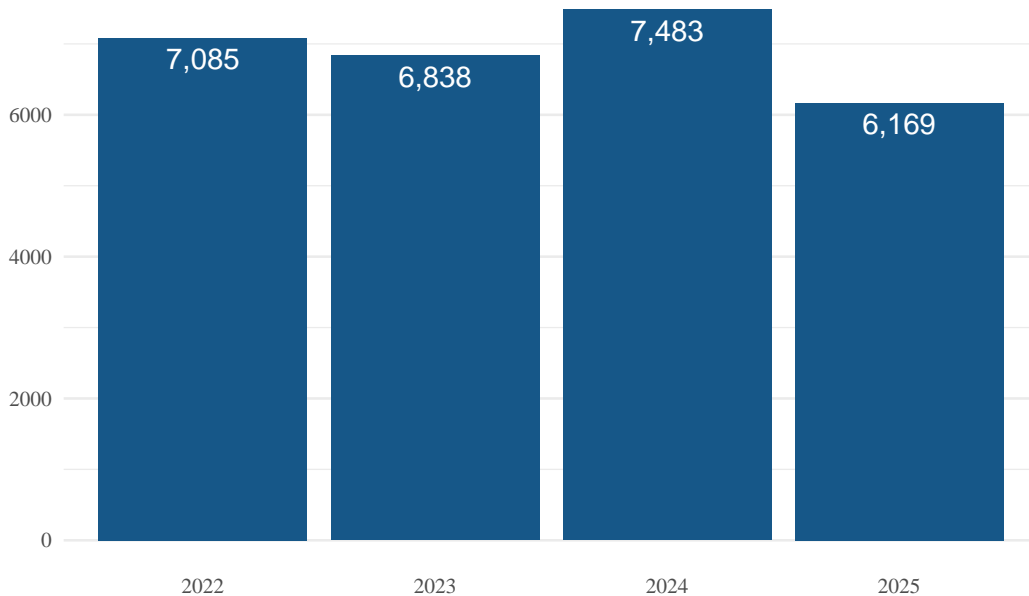
**Figure 7. Unemployment Rate by Month, Wake County vs. NC**

*January 2020 through September 2025*



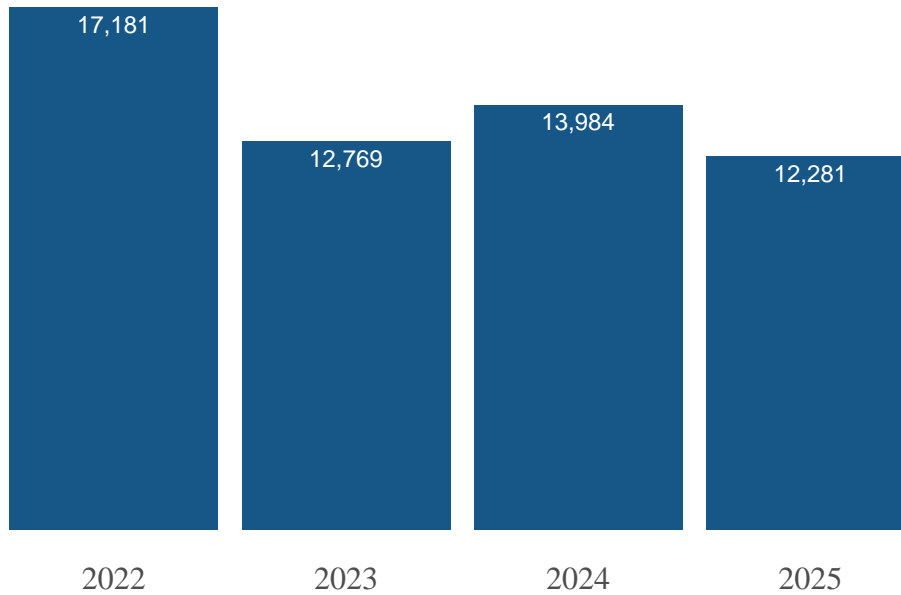
Building permits warrant continued monitoring, but are not yet at a level to impact enrollment. After remaining weak in 2023, permits rose through 2024. In 2025 they were strong early in the year but began declining in the second half leading to a 9-month total that is over 1,000 lower than last year.

**Figure 8. New Residential Building Permits: Wake County (Jan– Sept)**



Home sales declined in 2020 compared to 2019 and increased slightly in 2021 compared to 2020 with a very strong close to the year. In 2022, sales began falling with the impact of rising interest rates. Yearly sales fell 23% (-6,704 sales). In 2024, between January and September, total home sales in Wake County were up 1,215 or 10% compared to the same period in 2023. However, total home sales between January and September 2025 were 12,281 which was 1,703 (or 12%) lower than the same period 2024.

**Figure 9. Home Sales in Wake County**

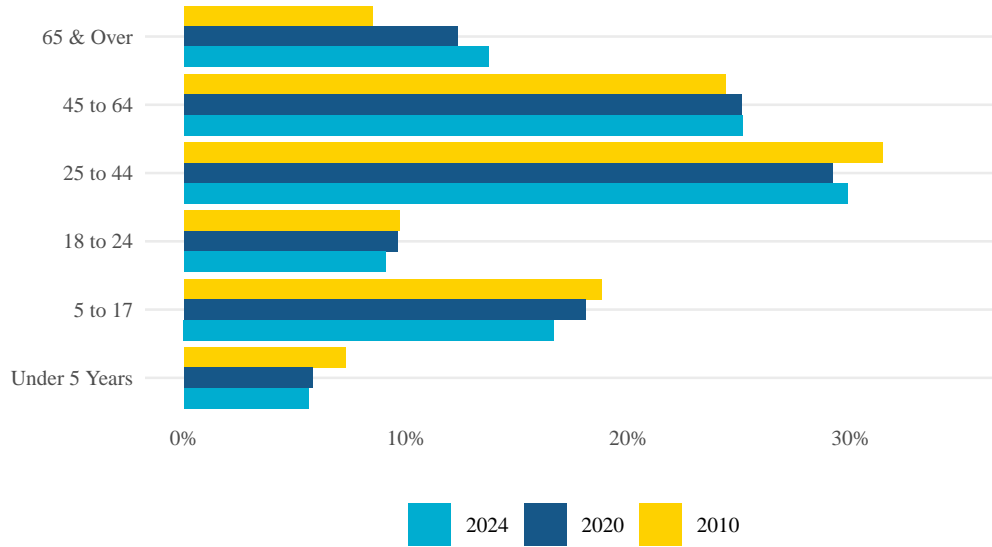


### **Impacts of Population Structure and Change**

U.S. Census Bureau estimates indicate that Wake County’s population continues to age. Examining the change in distribution of select age cohorts reflects an increase in the share of total population for older adults (ages 65 years and over) between 2010 and 2022. As shown below in Figure 8, the population ages 65 and over accounted for 9% of the population on July 1, 2010; by July 1, 2020, this age group accounted for 12% of the County’s total population.

### Figure 10. Share of Population by Age Group

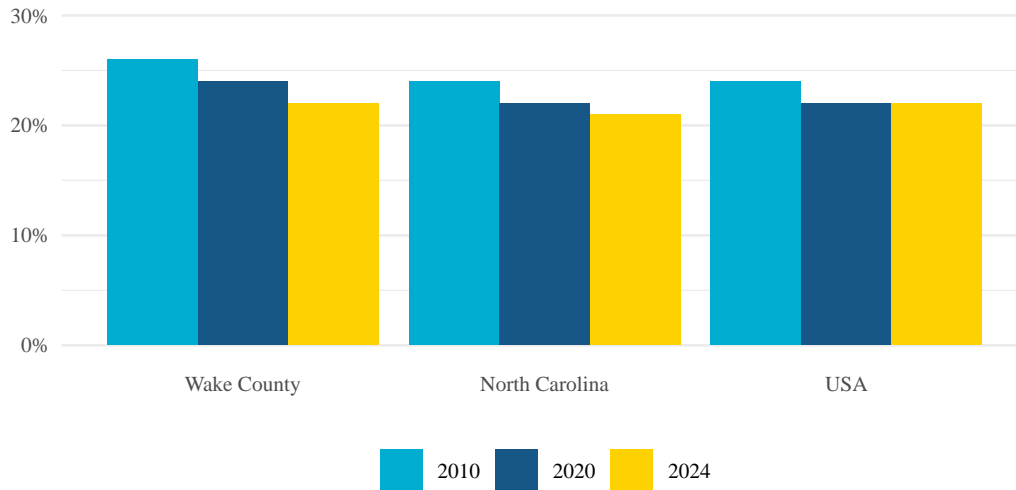
Wake County: 2010, 2020, and 2024



Source: U.S. Census Bureau, Population Division, Population Estimates

However, while the population continues to age, Wake County is still slightly younger than North Carolina and the United States as a whole. Figure 9 shows the proportion of the population 18 years and under for 2010, 2020, and 2024 for Wake County, North Carolina, and the United States. As we can see here, while the percentage decreases over time for each geographic entity, Wake County stays at a higher percentage than the comparison groups.

**Figure 11. Share of Population Under 18 Years of Age**  
*Wake County, North Carolina, and USA: 2010, 2020, and 2024*



*Source: U.S. Census Bureau, Population Division, Population Estimates*

## 2024-25 Forecast Performance

The table below highlights enrollments by grade for 2024-25 and actual enrollment for 2025-26 and the 2025-26 forecast for WCPSS. Patterns are similar to the changes in enrollment by grade described above.

When comparing the 2025-26 forecast to the actual enrollments, the total enrollment reported was 2,007 students lower the forecast enrollment. Actual enrollments across almost every grade were lower than those projected by the model. The exceptions were grade 3, 7, 10, and 11 where actual enrollments were higher than the forecast. Forecast deviation was negative for elementary school ages, driven completely by Kindergarten and first grades. Middle and high school deviations were positive.

As discussed last year, the changes in the Opportunity Scholarship Program and changes in federal level immigration policy were big unknowns leading into the 2025-26 school year. It is likely that each of these risks to the forecast had a substantial impact on forecast performance for this school year.

## 2025-26 Ten-Year K-12 Forecast

The 2025-26 ten-year K-12 forecast is based on the Month 2 Average Daily Membership (ADM) as reported by WCPSS.

**Table 5a. WCPSS Changes in Membership by Grade, 2025-26 vs. 2024-25 and Forecast**

*Membership by Grade*

	2024-25 (actual)	2025-26 (forecast)	2025-26 (actual)	Net Gain (2025-26 - 2024-25)	Percentage Change	Variance (actual - forecast)
K	11,052	11,728	10,896	-156	-1.4%	-832
1	11,437	12,313	11,162	-275	-2.4%	-1,151
2	11,725	11,690	11,593	-132	-1.1%	-97
3	12,211	11,845	11,866	-345	-2.8%	21
4	11,774	12,420	12,333	559	4.7%	-87
5	12,059	11,961	11,884	-175	-1.5%	-77
6	11,784	12,015	12,116	332	2.8%	101
7	11,950	11,979	12,050	100	0.8%	71
8	12,357	12,158	12,137	-220	-1.8%	-21
9	14,778	14,577	14,496	-282	-1.9%	-81
10	13,830	13,634	13,722	-108	-0.8%	88
11	13,225	13,295	13,462	237	1.8%	167
12	12,933	12,805	12,696	-237	-1.8%	-109
<b>Total</b>	<b>161,115</b>	<b>162,420</b>	<b>160,413</b>	<b>-702</b>	<b>-0.4%</b>	<b>-2,007</b>

Source: Month 2 ADM. Principal's Monthly Report, NC DPI and WCPSS Technology

**Table 5b. WCPSS Changes in Membership by Grade, 2025-26 vs. 2024-25 and Forecast**

*Membership by Level*

	2024-25 (actual)	2025-26 (forecast)	2025-26 (actual)	Net Gain (2025-26 - 2024-25)	Percentage Change	Variance (actual - forecast)
K-5	70,258	71,957	69,734	-524	-0.7%	-2,223
6-8	36,091	36,152	36,303	212	0.6%	151
9-12	54,766	54,311	54,376	-390	-0.7%	65
<b>Total</b>	<b>161,115</b>	<b>162,420</b>	<b>160,413</b>	<b>-702</b>	<b>-0.4%</b>	<b>-2,007</b>

Source: Month 2 ADM. Principal's Monthly Report, NC DPI and WCPSS Technology

## Methodology

Future enrollments in WCPSS were projected using the grade progression methodology described by the Western Interstate Commission for Higher Education (WICHE)<sup>7</sup>.

More specifically, projections were calculated using a grade progression ratio (GPR), which uses data from kindergarten through twelfth grades to project enrollments in future years. A five-year smoothed average ratio was used to place greater weight on more recent years with changing demographics and was calculated as:

$$Y_{pt} = wY_{p(t-1)} + (1 - w) \frac{\sum_{i=2}^5 Y_{p(t-i)}}{4}$$

where  $Y_{pt}$  is the grade progression ratio at a point  $p$  in year  $t$ , and  $w$  is the weight. This weight is 0.4 in the first year and 0.15 for each of the four prior years.

GPRs were calculated through 2025 using the above mentioned methodology and held constant for the remainder of the forecast period.

## Assumptions

The ten-year forecast was made with the following assumptions:

- Individuals who are currently enrolled in alternative schooling options (home school, charters, and privates) will stay in these options.
- Births in Wake County will have small but steady increases, reflecting continued population growth.
- No new assumptions were made about increases in private school enrollment, beyond the current growth trends. However, we are noticing changes in grade progression ratios (GPRs) that are likely due to both private school enrollment increases in the current year and decreases in net international migration.
- Home sales and building permits have generally leveled out, thus we are not including any new assumptions about impacts on school enrollment based on these trends.

## Projecting Fertility

While Wake County births decreased during 2020, they rebounded in 2021 to the highest level since 2016 and had a small decline in 2022 and 2023, and a slightly larger increase in 2024. We assumed births will continue to stabilize and then grow, reflecting overall strong population growth in Wake County. Births were projected based on a linear regression of the last 20 years of births in Wake County.

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<sup>7</sup>Bransberger, Peace and Demarée K. Michelau. 2016. Knocking at the College Door: Projections of High School Graduates. 9th ed. Boulder, CO: Western Interstate Commission for Higher Education.

**Table 6. Wake County Resident Live Births**

*2025 estimated, 2026-2030 projected*

2023	2024	2025	2026	2027	2028	2029	2030
12,950	13,348	13,328	13,434	13,499	13,565	13,630	13,696

**Accounting for Missing Kindergartners**

Month 2 kindergarten enrollment was nearly 830 students lower than expected based on the number of births in 2020 and historical kindergarten yields. These missing kindergartners could enroll directly in Grade 1 in 2026-27, or they could instead enroll in kindergarten. Based on the challenge in accurately forecasting kindergarten enrollments in 2026-27, and the continued challenges posed by COVID-19, we did not assume that these “missing” kindergartners would be enrolled in WCPSS in 2026-27.

**Results**

The forecast yields the following results for Month 2 ADM:

- In 2026-27, a net gain of 48 students over the 2025-26 Month 2 ADM, an increase of 0.03%.
- Initial decline in Month 2 ADM in 2027-28 and 2028-29 and then steady but small increase through 2033-34.
- Modest overall gain of 2,634 students (1.6%) over the ten-year period.

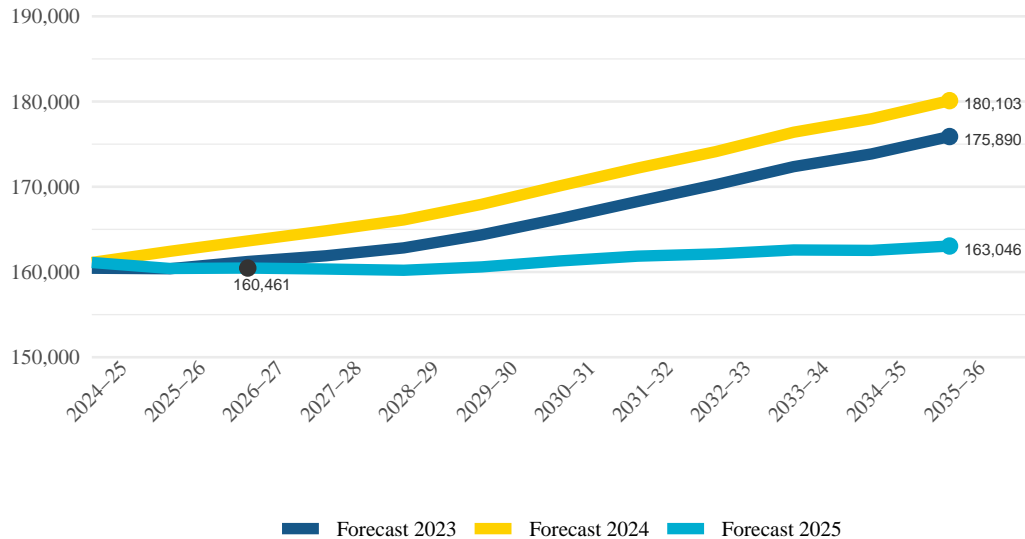
Starting in 2026-27, enrollments are forecast to rise marginally and then decline for the next two consecutive school years. We expect this on account of the implementation of the private school voucher program and the decline in international migration, both of which will impact enrollments in WCPSS. A comparison of the forecast against the previous forecast series (2023 and 2024) shows a lower trajectory than previously predicted on account of the factors discussed above. However, the extent of the impact will only be clear once migration and private school enrollment data becomes available.

**Table 7. Final WCPSS Enrollment Projections by Grade**  
*Month 2 ADM*

Grade	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	Change, 2026-2035
K	11,052	10,896	11,431	11,450	11,241	11,587	11,570	11,661	11,718	11,775	11,832	11,889	458
1	11,437	11,162	11,004	11,544	11,564	11,353	11,702	11,685	11,778	11,835	11,892	11,950	946
2	11,725	11,593	11,314	11,155	11,702	11,722	11,508	11,862	11,844	11,938	11,996	12,055	741
3	12,211	11,866	11,732	11,450	11,289	11,843	11,862	11,647	12,005	11,987	12,082	12,141	409
4	11,774	12,333	11,985	11,850	11,565	11,401	11,961	11,981	11,763	12,125	12,107	12,202	217
5	12,059	11,884	12,448	12,097	11,960	11,673	11,508	12,073	12,093	11,873	12,238	12,220	-228
6	11,784	12,116	11,940	12,507	12,154	12,017	11,728	11,562	12,130	12,150	11,929	12,296	356
7	11,950	12,050	12,389	12,210	12,789	12,428	12,288	11,993	11,823	12,404	12,424	12,198	-191
8	12,357	12,137	12,239	12,583	12,401	12,990	12,623	12,480	12,180	12,008	12,598	12,619	380
9	14,778	14,496	14,238	14,357	14,762	14,547	15,238	14,807	14,641	14,289	14,087	14,778	540
10	13,830	13,722	13,460	13,221	13,331	13,707	13,508	14,149	13,749	13,595	13,268	13,080	-380
11	13,225	13,462	13,357	13,102	12,869	12,976	13,342	13,148	13,773	13,384	13,233	12,915	-442
12	12,933	12,696	12,924	12,823	12,578	12,354	12,457	12,808	12,622	13,222	12,848	12,704	-220
<b>Total</b>	<b>161,115</b>	<b>160,413</b>	<b>160,461</b>	<b>160,349</b>	<b>160,205</b>	<b>160,598</b>	<b>161,295</b>	<b>161,856</b>	<b>162,119</b>	<b>162,585</b>	<b>162,534</b>	<b>163,047</b>	
# Change	1,120	-702	48	-112	-144	393	697	561	263	466	-51	513	
% Change	0.7%	-0.4%	0.0%	-0.1%	-0.1%	0.2%	0.4%	0.3%	0.2%	0.3%	-0.0%	0.3%	

## Figure 12. Comparison of Current and Past Forecast Series

WCPSS Total Enrollment: Forecast 2025–26, 2024–25, 2023–24



Source: Demographic Analytics Advisors and Carolina Demography

The final set of projections has been included as an Excel file.

### Concerns/Unknowns

Lingering questions about future years include:

- What will be the magnitude of the impact of the expansion of the Opportunity Scholarship Program be on enrollment?
- How will the decline in the net migration impact enrollment and for how long?
- What will the impact of charter schools be on enrollment moving forward? Will it change based on the expansion of the Opportunity Scholarship Program?

In any year, there are challenges in making projections, but as we have moved out of the COVID-19 pandemic we have found ourselves in further uncertainty with changes in the Opportunity Scholarship Program eligibility and funding, as well as with changes in international immigration and emigration.