San Mateo County Community College District
Enrollment Projections and Scenarios

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Executive Summary

This report summarizes enrollment projections and scenarios for the San Mateo County Community College District (SMCCCD) and each of its three colleges (Cañada, College of San Mateo, and Skyline) for fall terms from 2015 through 2030. The enrollment projections draw on population projections from the California Department of Finance, broken down by race/ethnicity, age, and county. Market shares of enrollments at SMCCCD were then derived for each college and applied to future population projections. Projections were also broken down for San Mateo county and the two main surrounding counties (San Francisco and Santa Clara) from which the District draws most of its out-of-county students.

Enrollment projections were made for five scenarios and assume that the three colleges can increase market shares in key age ranges. In the first scenario, it was assumed that the market shares by age and race for each college will not change from fall 2015 to fall 2030. In other words, the first scenario maintains the status quo scenario meaning that no new efforts to recruit or retain students would be made through the projection period. The second scenario models the effect of increasing the market shares for young adults (ages 15 to 24) at each college by five percent over each five-year increment. In the third scenario, it was assumed that the market shares of working-aged adults (ages 25 to 54) for each college increased by five percent over each five-year period. In the fourth scenario, it was assumed that the market shares of older adults (ages 55 and over) at each college increased by five percent over each five-year period. Finally, the last scenario is cumulative. It models the impact of growth in younger, working-age, and older adults simultaneously.

The main findings of this report are encouraging for the District and its colleges. Due to favorable demographic trends in San Mateo and surrounding counties among younger adults, all colleges in the District should see increased demand for their services between fall 2015 and fall 2030. If the colleges are able to maintain their current market shares of the population over this period, district enrollments are forecast to rise by about 2,500 students (10.7%) by fall 2030. At the same time, the District has additional opportunities for growth if it is able to increase its penetration into the younger adult market over this time period. By increasing its market shares of youth and traditional college age ranges (15-24) by 5 percent in 5-year intervals, for example, SMCCCD can increase enrollments by about 5,000 students by 2030, resulting in an additional 2,500 students over the baseline scenario by 2030.

Scenario Development

The data used in this report were obtained from two main sources. Population projections for the counties of San Mateo, San Francisco, and Santa Clara were acquired from the Demographic Research Unit at the California Department of Finance.[1] The data show population projections for each county in the State of California broken down by age and race/ethnicity for the years 2010 through 2060. This report uses the year 2030 as a logical endpoint for planning efforts. Enrollment data were obtained from each college. The data were broken down by gender, age, and race/ethnicity for the fall 2013 semester. The college enrollment data also separated enrollments based on whether students were "in county" (i.e., reside in San Mateo) or "out of county." Because most community college students attend institutions that are within commuting distance of their homes, this report uses the surrounding counties of San Francisco and Santa Clara to represent these students.[2]

The first step in deriving enrollment projections is to estimate the current market shares of students enrolled at each SMCCCD college by age, race, and county of residence. The market shares were determined by dividing the enrollments within each category by the corresponding population. This can be represented by the following formula:

(1) $$S_{hijk} = E_{hijk}/P_{hij}$$

where E = college enrollments, P = population, S = market share, subscript h = age category, subscript i = race category, subscript j = county, and subscript k = SMCCCD college designator. There were eleven age categories used in this study: 15-19, 20-24, 25-29, 30-34, 35-39, 40-44, 45-49, 50-54, 55-59, 60-64, and 65+. With regard to race/ethnicity, the data were grouped into the following categories: white, black, Hispanic, and all other.[3] For county of residence, there were only two groups used: in-county (San Mateo) and out-of-county (San Francisco and Santa Clara combined). Finally, the three colleges used in these projections were Skyline College, Canada College, and the College of San Mateo. Therefore, P_{hij} denotes the number of people living in county j within age category h and race category i. Likewise, the resulting values for S_{hijk} represent the proportion of the relevant population in 2015 that was enrolled at the given SMCCCD college in Fall 2013.[4]

The enrollment forecasts for the fall terms 2020, 2025, and 2030 were then obtained by multiplying the population projections P_{hij} for each year by the assumed market share for the

[1] The data were retrieved from: http://www.dof.ca.gov/research/demographic/reports/projections/P-2/

[2] Some SMCCCD students reside in other counties such as Alameda and Santa Cruz. Given that approximately 80 percent of SMCCCD students are from San Mateo county, expanding the list of surrounding counties for the purpose of simulations would reduce the estimated market shares while producing a negligible effect on the final totals.

[3] Race/ethnicity categories in use by the District do not correspond directly to those aggregated categories published by CDE. After analysis of District race/ethnicity data, especially uneven selection of the "multi-race" categories by students across the District compared to CDE categories and the non-use Filipino, Pacific Islander, and Native Hawaiian by CDE, a decision was made to collapse categories. Therefore, The racial/ethnic groups used in this report were based on categories that were reliably common across the two sources of data.

[4] Because the enrollment and population data were drawn from different years, the best that could be done was to approximate the market shares by dividing enrollments in Fall 2013 by the population projections for 2015.

same year. This can be expressed mathematically by rewriting equation (1) and adding a subscript *t* for time as follows:

(2) $\hat{E}_{hijkt} = P_{hijt} * S_{hijkt}$

where $\hat{E}$ = predicted enrollments for the relevant category in year *t*. Because the population projections for each group have been determined by the California Department of Finance, the last step in obtaining enrollment projections is to specify the future enrollment shares for each group. Five different sets of assumptions regarding future market shares were used in this report.

Enrollment Scenarios

Scenario A: Baseline. In the baseline, or status quo, scenario it was assumed that all future market shares were set equal to the starting market shares in fall 2013. In other words, this scenario models what will happen if the three colleges do nothing different to recruit or retain students.

(3) $S_{hijk1} = S_{hijk2} = S_{hijk3} = S_{hijk4}$

Therefore, the proportions of the population enrolling in each college in 2015, 2020, 2025, and 2030 are the same. If, for example, 5% of the population ages 15-19 in San Mateo county enrolled in the College of San Mateo in 2015, then it was assumed that 5% of the San Mateo populations in 2020, 2025, and 2030 would also enroll in the College of San Mateo in these respective years.

In the next four scenarios, selected market shares were increased by five percent for each 5-year period under consideration:

(4) $S_{hijkt} = (1.05) * S_{hijkt-1}$

In each of the following scenarios, the same 5% growth rates were used for each college, race/ethnicity group, and county. The only variations in growth rates of market shares occurred by age group as described below.

Scenario B: Increase Young Adults by 5%. In the second scenario, the proportion of the population ages 15 to 24 enrolling in each college was assumed to grow by five percent for each five-year period under consideration.

Scenario C: Increase Working-aged Adults by 5%. In the third scenario, the proportion of the population ages 25 to 54 enrolling in each college was assumed to grow by five percent for each five-year period under consideration.

Scenario D: Increase Older Adults by 5%. In the fourth scenario, the proportion of the population ages 55 and over enrolling in each college was assumed to grow by five percent for each five-year period under consideration.

Scenario E: Cumulative Increase. In the last scenario, the proportion of all age groups enrolling in each college was assumed to grow by five percent for each five-year period.

Population Trends

Table 1 is an overview of the population trends for San Mateo County and the two surrounding counties for the years 2015 through 2030. The first four columns show the population projections broken down by age category. The fifth column reports the population growth or decline in numbers from 2015 to 2030, whereas the last column shows the percentage change in population from 2015 to 2030.

From Table 1, it can be seen that overall projections are calling for an additional 57,000 people, or 9.4% growth in population, in San Mateo County between 2015 and 2030. Most of this growth takes place after the year 2020. Similarly, the two surrounding counties are projected to experience a 6.8% population growth over the same period. The changes in population, however, are projected to vary considerably by age. The largest growth for both areas is in older adults, whose numbers are projected to rise by more than 50% over the next 15 years and reflects the aging of the Baby Boomer generation. Both San Mateo and the surrounding counties are expected to experience above average growth in population for people ages 29 and younger, and declines in population for adults ages 30-54. Because the vast majority of students currently attending SMCCCD are younger adults, this population trend should provide opportunities for increased demand for services in the coming years.

Table 2 provides more information on the projected changes in the San Mateo and surrounding county populations by race/ethnicity between 2015 and 2030. Totals are shown for four race/ethnicity categories: white, black, Hispanic, and all other. The table illustrates that Hispanics and all other racial/ethnic groups represent the largest projected population growth category in the region over the next fifteen years, with 24.5% increase for San Mateo County and 13% for the surrounding counties. In contrast, the white population in both areas is projected to fall by four to six percent between 2015 and 2030, and the black population should experience a slight decline in San Mateo County and a larger drop in the surrounding counties for the same time period.

Table 1. Population Projections by Age and County, 2015 to 2030						
San Mateo County						
					2015 to 2030:	
Age	2015	2020	2025	2030	Change	% Change
15-19	43,937	43,821	46,642	49,585	5,649	12.9%
20-24	44,035	43,529	45,723	50,696	6,661	15.1%
25-29	43,196	44,219	45,342	49,833	6,637	15.4%
30-34	51,955	44,084	45,819	48,598	-3,357	-6.5%
35-39	52,587	51,629	44,265	47,154	-5,433	-10.3%
40-44	53,201	51,029	51,280	44,933	-8,268	-15.5%
45-49	54,363	51,066	50,443	51,897	-2,466	-4.5%
50-54	55,159	52,001	50,321	50,772	-4,387	-8.0%
55-59	52,852	52,377	50,903	50,293	-2,559	-4.8%
60-64	46,020	49,363	50,563	50,191	4,171	9.1%
65+	112,338	128,038	149,744	172,760	60,422	53.8%
Total	609,642	611,156	631,045	666,712	57,071	9.4%
Surrounding Counties						
					2015 to 2030:	
Age	2015	2020	2025	2030	Change	% Change
15-19	155,907	161,563	168,970	179,796	23,889	15.3%
20-24	171,106	172,825	181,497	190,519	19,413	11.3%
25-29	203,480	190,590	196,636	205,775	2,294	1.1%
30-34	219,088	194,159	182,902	190,273	-28,815	-13.2%
35-39	209,039	206,186	183,961	173,971	-35,067	-16.8%
40-44	205,754	197,708	197,812	175,364	-30,390	-14.8%
45-49	194,387	193,498	188,236	187,829	-6,558	-3.4%
50-54	189,491	183,979	185,718	180,529	-8,961	-4.7%
55-59	174,730	179,456	177,145	179,169	4,439	2.5%
60-64	148,368	162,956	171,061	169,365	20,997	14.2%
65+	358,977	412,938	480,785	548,845	189,868	52.9%
Total	2,230,328	2,255,857	2,314,722	2,381,436	151,108	6.8%

Table 2. Population Projections by Race and County, 2015 and 2030				
San Mateo County				
			2015 to 2030:	
Race/Ethnicity	2015	2030	Change	% Change
White	247,644	230,811	-16,833	-6.8%
Black	18,160	17,811	-349	-1.9%
Hispanic	158,428	197,299	38,870	24.5%
All Other	185,410	220,792	35,381	19.1%
Surrounding Counties				
			2015 to 2030:	
Race/Ethnicity	2015	2030	Change	% Change
White	837,801	799,970	-37,832	-4.5%
Black	80,535	74,519	-6,017	-7.5%
Hispanic	506,472	572,504	66,032	13.0%
All Other	805,520	934,443	128,924	16.0%

Current District Market Shares

To estimate enrollment, the first step is to calculate the current market shares for each college by age and race (S_{hijk1}). This was accomplished by dividing the enrollments for each college in Fall 2013 by age and race by the corresponding population projection for 2015. Separate market shares were calculated for San Mateo County and for the surrounding counties. Tables 3 through 5 show the enrollment breakdown in Fall 2013 for each SMCCCD College by race/ethnicity and age.

Table 3. Enrollment by Race and Age for Cañada College by County, Fall 2013					
San Mateo County					
Age	White	Black	Hispanic	Other	Total
15-19	303	21	355	294	973
20-24	406	36	643	448	1,533
25-29	195	21	295	185	696
30-34	107	15	198	93	413
35-39	66	8	142	55	271
40-44	80	12	109	49	250
45-49	78	12	72	41	203
50-54	76	9	45	29	159
55-59	69	7	34	20	130
60-64	37	9	14	6	66
65+	43	3	8	5	59
Total	1,460	153	1,915	1,225	4,753
Surrounding Counties					
Age	White	Black	Hispanic	Other	Total
15-19	18	6	27	60	111
20-24	56	17	51	94	218
25-29	46	12	42	77	177
30-34	34	13	24	52	123
35-39	25	6	19	28	78
40-44	21	7	19	20	67
45-49	19	6	14	13	52
50-54	24	5	7	10	46
55-59	15	0	6	7	28
60-64	6	1	1	1	9
65+	18	0	2	4	24
Total	282	73	212	366	933

From Table 3, the following observations can be made regarding enrollments at Cañada College:

- Five out of six students come from San Mateo county
- The student population is fairly diversified with comparable shares of white, Hispanic, and all other race students enrolled at the institution

- Approximately three out of ten students at Cañada are traditional-aged students (20-24), followed by students ages 15-19 and students ages 25-29. Combined, students under the age of 30 account for nearly two-thirds of the enrollments.

Table 4. Enrollment by Race and Age for College of San Mateo by County, Fall 2013

San Mateo County					
Age	White	Black	Hispanic	Other	Total
15-19	572	42	421	1,012	2,047
20-24	707	45	604	1,017	2,373
25-29	271	24	186	320	801
30-34	163	16	118	196	493
35-39	111	12	64	122	309
40-44	102	8	47	87	244
45-49	69	7	33	73	182
50-54	112	11	18	38	179
55-59	90	7	14	37	148
60-64	61	8	5	25	99
65+	82	4	7	31	124
Total	2,340	184	1,517	2,958	6,999
Surrounding Counties					
Age	White	Black	Hispanic	Other	Total
15-19	72	42	48	239	401
20-24	100	29	97	261	487
25-29	69	22	34	141	266
30-34	32	12	23	72	139
35-39	27	6	10	44	87
40-44	14	9	7	21	51
45-49	13	4	8	12	37
50-54	14	8	6	3	31
55-59	9	2	5	8	24
60-64	5	1	1	5	12
65+	8	0	2	1	11
Total	363	135	241	807	1,546

The following observations can be made regarding enrollments at the College of San Mateo:

- Approximately five out of six students come from San Mateo county
- The two largest racial/ethnic groups of students are white and all other races, followed by Hispanic and black students.
- Approximately three out of ten students at the College of San Mateo are traditional-aged students (20-24) and younger students (15-19), followed by students ages 25-29. Combined, students under the age of 25 account for 62% of the enrollments at the College of San Mateo.
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Table 5. Enrollment by Race and Age for Skyline College by County, Fall 2013					
San Mateo County					
Age	White	Black	Hispanic	Other	Total
15-19	299	24	260	902	1,485
20-24	530	46	565	1,500	2,641
25-29	180	35	176	481	872
30-34	103	10	101	260	474
35-39	61	9	60	136	266
40-44	57	7	47	98	209
45-49	61	5	37	70	173
50-54	59	7	29	66	161
55-59	52	9	15	45	121
60-64	40	2	11	32	85
65+	73	2	9	24	108
Total	1,515	156	1,310	3,614	6,595
Surrounding Counties					
Age	White	Black	Hispanic	Other	Total
15-19	41	32	77	289	439
20-24	121	50	140	645	956
25-29	74	32	53	262	421
30-34	38	15	29	115	197
35-39	25	8	8	41	82
40-44	21	8	10	29	68
45-49	20	2	8	17	47
50-54	15	8	4	13	40
55-59	10	2	3	15	30
60-64	8	0	2	7	17
65+	19	0	4	6	29
Total	392	157	338	1,439	2,326

From Table 5, the following observations can be made regarding enrollments at Skyline College:

- Approximately three out of every four students come from San Mateo county.
- The student population is most highly concentrated among students in the "all other race" category, followed by white and Hispanic students.
- The largest age category of students at Skyline College is for traditional-aged students (20-24), followed by younger students (15-19) and students ages 25-29. Combined, seven out of ten students at Skyline College are under the age of 30.

Looking across Tables 3 through 5, it can be seen that there are commonalities in the distributions of enrollment by college. Most students attending one of the SMCCCD institutions are below the age of 30, reside in San Mateo County, and come from a variety of racial/ethnic backgrounds. At the same time, the age distribution at the College of San Mateo appears to be slightly younger than at the other two colleges, and Skyline College appears to draw more students from the surrounding counties than do Canada College and the College of San Mateo. Given Skyline's location near the boundary of the City and County of San Francisco, this is not surprising.

Tables 6 through 8 calculate the market shares of students by age and race/ethnicity for each of the three colleges. The market shares were obtained by dividing the college-specific enrollments in Tables 3 through 5 by the corresponding population figures in Table 1. The market shares are reported separately for each college and for San Mateo county and the surrounding counties. As noted above, these are estimated market shares obtained by dividing enrollments in fall 2013 by population projections for 2015.

Table 6. Estimated Market Shares for Cañada College, Fall 2013

San Mateo County					
Age	White	Black	Hispanic	Other	Total
15-19	2.21%	1.90%	2.21%	2.26%	2.21%
20-24	3.17%	2.41%	3.80%	3.50%	3.48%
25-29	1.79%	1.51%	1.63%	1.45%	1.61%
30-34	0.71%	1.08%	1.04%	0.56%	0.79%
35-39	0.41%	0.61%	0.85%	0.30%	0.52%
40-44	0.43%	0.91%	0.73%	0.26%	0.47%
45-49	0.35%	0.79%	0.53%	0.24%	0.37%
50-54	0.30%	0.54%	0.38%	0.18%	0.29%
55-59	0.27%	0.40%	0.35%	0.13%	0.25%
60-64	0.16%	0.61%	0.20%	0.04%	0.14%
65+	0.07%	0.08%	0.05%	0.02%	0.05%
Total	0.59%	0.84%	1.21%	0.66%	0.78%

Table 6. Estimated Market Shares for Cañada College, Fall 2013					
Surrounding Counties					
Age	White	Black	Hispanic	Other	Total
15-19	0.04%	0.13%	0.05%	0.11%	0.07%
20-24	0.11%	0.25%	0.09%	0.16%	0.13%
25-29	0.06%	0.17%	0.07%	0.13%	0.09%
30-34	0.04%	0.19%	0.04%	0.07%	0.06%
35-39	0.04%	0.09%	0.03%	0.03%	0.04%
40-44	0.03%	0.11%	0.04%	0.02%	0.03%
45-49	0.03%	0.09%	0.03%	0.02%	0.03%
50-54	0.03%	0.06%	0.02%	0.01%	0.02%
55-59	0.02%	0.00%	0.02%	0.01%	0.02%
60-64	0.01%	0.02%	0.00%	0.00%	0.01%
65+	0.01%	0.00%	0.00%	0.00%	0.01%
Total	0.03%	0.09%	0.04%	0.05%	0.04%

Table 7. Estimated Market Shares for College of San Mateo, Fall 2013					
San Mateo County					
Age	White	Black	Hispanic	Other	Total
15-19	4.17%	3.80%	2.62%	7.77%	4.66%
20-24	5.52%	3.01%	3.57%	7.94%	5.39%
25-29	2.48%	1.72%	1.03%	2.51%	1.85%
30-34	1.09%	1.15%	0.62%	1.19%	0.95%
35-39	0.69%	0.91%	0.38%	0.66%	0.59%
40-44	0.55%	0.61%	0.32%	0.47%	0.46%
45-49	0.31%	0.46%	0.24%	0.43%	0.33%
50-54	0.44%	0.65%	0.15%	0.23%	0.32%
55-59	0.35%	0.40%	0.15%	0.24%	0.28%
60-64	0.26%	0.54%	0.07%	0.18%	0.22%
65+	0.13%	0.11%	0.05%	0.10%	0.11%
Total	0.94%	1.01%	0.96%	1.60%	1.15%
Surrounding Counties					
Age	White	Black	Hispanic	Other	Total
15-19	0.17%	0.89%	0.09%	0.43%	0.26%
20-24	0.20%	0.43%	0.17%	0.45%	0.28%
25-29	0.09%	0.32%	0.06%	0.24%	0.13%
30-34	0.04%	0.18%	0.04%	0.09%	0.06%

Table 7. Estimated Market Shares for College of San Mateo, Fall 2013					
35-39	0.04%	0.09%	0.02%	0.05%	0.04%
40-44	0.02%	0.14%	0.01%	0.03%	0.02%
45-49	0.02%	0.06%	0.02%	0.02%	0.02%
50-54	0.02%	0.10%	0.02%	0.00%	0.02%
55-59	0.01%	0.02%	0.02%	0.01%	0.01%
60-64	0.01%	0.02%	0.00%	0.01%	0.01%
65+	0.00%	0.00%	0.00%	0.00%	0.00%
Total	0.04%	0.17%	0.05%	0.10%	0.07%

Table 8. Estimated Market Shares for Skyline College, Fall 2013					
San Mateo County					
Age	White	Black	Hispanic	Other	Total
15-19	2.18%	2.17%	1.62%	6.92%	3.38%
20-24	4.14%	3.08%	3.34%	11.70%	6.00%
25-29	1.65%	2.51%	0.97%	3.77%	2.02%
30-34	0.69%	0.72%	0.53%	1.58%	0.91%
35-39	0.38%	0.68%	0.36%	0.73%	0.51%
40-44	0.31%	0.53%	0.32%	0.53%	0.39%
45-49	0.28%	0.33%	0.27%	0.41%	0.32%
50-54	0.23%	0.42%	0.25%	0.40%	0.29%
55-59	0.20%	0.52%	0.16%	0.29%	0.23%
60-64	0.17%	0.13%	0.16%	0.23%	0.18%
65+	0.11%	0.05%	0.06%	0.08%	0.10%
Total	0.61%	0.86%	0.83%	1.95%	1.08%
Surrounding Counties					
Age	White	Black	Hispanic	Other	Total
15-19	0.10%	0.68%	0.15%	0.52%	0.28%
20-24	0.24%	0.75%	0.25%	1.11%	0.56%
25-29	0.10%	0.46%	0.09%	0.44%	0.21%
30-34	0.05%	0.22%	0.05%	0.15%	0.09%
35-39	0.04%	0.12%	0.01%	0.05%	0.04%
40-44	0.03%	0.13%	0.02%	0.03%	0.03%
45-49	0.03%	0.03%	0.02%	0.02%	0.02%
50-54	0.02%	0.10%	0.01%	0.02%	0.02%
55-59	0.01%	0.02%	0.01%	0.02%	0.02%
60-64	0.01%	0.00%	0.01%	0.01%	0.01%

Table 8. Estimated Market Shares for Skyline College, Fall 2013					
65+	0.01%	0.00%	0.01%	0.00%	0.01%
Total	0.05%	0.19%	0.07%	0.18%	0.10%

The market shares show that the largest market penetrations for each college is among adults under the age of 25. The very low market shares for the surrounding counties reflect the fact that these colleges primarily serve San Mateo County.

Scenario A: Baseline Enrollment Projections

The staring place for the analysis is to derive baseline, or status quo, enrollment projections. As noted earlier, the baseline projections assume that the SMCCCD college-specific market shares for San Mateo and surrounding counties remain constant from fall 2015 through fall 2030. Table 8 provides a summary of the baseline projections for the three colleges and the district as a whole. The top part of the table contains enrollment projections by college and year. The middle portion of the table provides breakdowns by race/ethnicity. Finally, the bottom of the table contains a breakdown of projected enrollments by age.

All things being equal and without special efforts to increase market shares, the District will experience a 2,500 student increase (or 10.7%) in enrollments over the next 15 falls. The enrollment gains are expected to be largest at Skyline College (+12.6%), followed by the College of San Mateo (+10.5%) and Canada College (+7.9%). Enrollments are forecasted to increase the fastest later in the planning period, between 2025 and 2030, due to demographic trends in San Mateo and the two main surrounding counties. With regard to race/ethnicity, the fastest growing categories of students should be in the all other race category (+19.1%) and Hispanics (+11.5%). The white student population should hold relatively steady over the next 15 years, and the black student population is projected to decline by 15.4%. Finally, this scenario, based on current market shares, shows that the student body at SMCCCD would become younger over the next 15 years, with more students between the ages 15-29 enrolling and fewer working-age students (30-54) enrolling. The highest percentage growth in enrollments is projected to be for older adults. However, because they represent a very small share of the current student body their impact on total enrollments would only be small.

Table 8. Summary of Enrollment Projections from 2015 to 2030 – Baseline Scenario							
					% Change from 2015:		
Totals by College	2015	2020	2025	2030	2020	2025	2030
Skyline College	8,921	8,900	9,262	10,048	-0.2%	3.8%	12.6%
Canada College	5,686	5,593	5,756	6,134	-1.6%	1.2%	7.9%
College of San Mateo	8,545	8,471	8,763	9,445	-0.9%	2.6%	10.5%
District Total	23,152	22,964	23,781	25,626	-0.8%	2.7%	10.7%
					% Change from 2015:		
District Totals by Race	2015	2020	2025	2030	2020	2025	2030
White	6,352	6,083	6,059	6,331	-4.2%	-4.6%	-0.3%
Black	858	811	759	726	-5.5%	-11.5%	-15.4%
Hispanic	5,533	5,468	5,792	6,171	-1.2%	4.7%	11.5%
Other	10,409	10,603	11,171	12,398	1.9%	7.3%	19.1%
District Total	23,152	22,964	23,781	25,626	-0.8%	2.7%	10.7%
					% Change from 2015:		
District Totals by Age	2015	2020	2025	2030	2020	2025	2030
15-19	5,456	5,555	5,925	6,478	1.8%	8.6%	18.7%
20-24	8,208	8,228	8,690	9,593	0.2%	5.9%	16.9%
25-29	3,233	3,287	3,365	3,679	1.7%	4.1%	13.8%
30-34	1,839	1,552	1,584	1,667	-15.6%	-13.9%	-9.4%
35-39	1,093	1,073	925	960	-1.9%	-15.3%	-12.1%
40-44	889	854	860	761	-3.9%	-3.2%	-14.4%
45-49	694	661	654	670	-4.7%	-5.8%	-3.5%
50-54	616	573	548	545	-6.9%	-11.0%	-11.5%
55-59	481	476	459	450	-1.0%	-4.6%	-6.5%
60-64	288	308	312	304	6.9%	8.4%	5.6%
65+	355	398	458	521	12.0%	29.2%	46.6%
District Total	23,152	22,964	23,781	25,626	-0.8%	2.7%	10.7%

Scenario B: Increase Market Shares for Younger Adults

In the second scenario, the market shares of younger adults (ages 15 to 24) within each race/ethnicity category and county of residence were assumed to increase by 5% for each 5-year period. Table 9 shows the corresponding aggregate enrollment projections.

Table 9. Summary of Enrollment Projections from 2015 to 2030 – Scenario B							
					% Change from 2015		
Totals by College	2015	2020	2025	2030	2020	2025	2030
Skyline College	8,921	9,180	9,873	11,085	2.9%	10.7%	24.3%
Canada College	5,686	5,735	6,062	6,647	0.9%	6.6%	16.9%
College of San Mateo	8,545	8,739	9,344	10,428	2.3%	9.4%	22.0%
District Total	23,152	23,654	25,279	28,159	2.2%	9.2%	21.6%
					% Change from 2015		
District Totals by Race	2015	2020	2025	2030	2020	2025	2030
White	6,352	6,242	6,390	6,883	-1.7%	0.6%	8.4%
Black	858	828	793	778	-3.5%	-7.6%	-9.3%
Hispanic	5,533	5,628	6,146	6,745	1.7%	11.1%	21.9%
Other	10,409	10,955	11,950	13,754	5.2%	14.8%	32.1%
District Total	23,152	23,654	25,279	28,159	2.2%	9.2%	21.6%
					% Change from 2015		
District Totals by Age	2015	2020	2025	2030	2020	2025	2030
15-19	5,456	5,833	6,532	7,499	6.9%	19.7%	37.4%
20-24	8,208	8,639	9,581	11,105	5.3%	16.7%	35.3%
25-29	3,233	3,287	3,365	3,679	1.7%	4.1%	13.8%
30-34	1,839	1,552	1,584	1,667	-15.6%	-13.9%	-9.4%
35-39	1,093	1,073	925	960	-1.9%	-15.3%	-12.1%
40-44	889	854	860	761	-3.9%	-3.2%	-14.4%
45-49	694	661	654	670	-4.7%	-5.8%	-3.5%
50-54	616	573	548	545	-6.9%	-11.0%	-11.5%
55-59	481	476	459	450	-1.0%	-4.6%	-6.5%
60-64	288	308	312	304	6.9%	8.4%	5.6%
65+	355	398	458	521	12.0%	29.2%	46.6%
District Total	23,152	23,654	25,279	28,159	2.2%	9.2%	21.6%

Under Scenario B, if SMCCCD were able to increase its market shares of younger adults by 5% for each of the 5-year periods from 2015 to 2030, then total enrollments in the district would rise by 5,000 students. This represents a doubling of the increase that would occur under the baseline scenario. The increase in market shares would have the biggest impact at Skyline College and the College of San Mateo, and would affect Hispanic and other race students more than it would white or black students.

Scenario C: Increase Working-aged Student Market Shares

In the third set of enrollment projections, the market shares of working-aged adults (ages 25 to 54) within each race/ethnicity category and county of residence were assumed to

increase by 5% for each 5-year period. Table 10 shows the corresponding aggregate enrollment projections.

Table 10. Summary of Enrollment Projections from 2015 to 2030 – Scenario C							
					% Change from 2015		
Totals by College	2015	2020	2025	2030	2020	2025	2030
Skyline College	8,921	9,044	9,555	10,521	1.4%	7.1%	17.9%
Canada College	5,686	5,715	6,006	6,534	0.5%	5.6%	14.9%
College of San Mateo	8,545	8,605	9,034	9,877	0.7%	5.7%	15.6%
District Total	23,152	23,364	24,595	26,932	0.9%	6.2%	16.3%
					% Change from 2015		
District Totals by Race	2015	2020	2025	2030	2020	2025	2030
White	6,352	6,196	6,284	6,680	-2.5%	-1.1%	5.2%
Black	858	831	797	780	-3.1%	-7.1%	-9.1%
Hispanic	5,533	5,572	6,013	6,536	0.7%	8.7%	18.1%
Other	10,409	10,765	11,500	12,935	3.4%	10.5%	24.3%
District Total	23,152	23,364	24,595	26,932	0.9%	6.2%	16.3%
					% Change from 2015		
District Totals by Age	2015	2020	2025	2030	2020	2025	2030
15-19	5,456	5,555	5,925	6,478	1.8%	8.6%	18.7%
20-24	8,208	8,228	8,690	9,593	0.2%	5.9%	16.9%
25-29	3,233	3,451	3,710	4,258	6.7%	14.8%	31.7%
30-34	1,839	1,629	1,746	1,929	-11.4%	-5.0%	4.9%
35-39	1,093	1,126	1,020	1,112	3.0%	-6.7%	1.7%
40-44	889	897	948	880	0.9%	6.7%	-1.0%
45-49	694	694	721	775	0.0%	3.9%	11.7%
50-54	616	602	604	631	-2.3%	-1.9%	2.5%
55-59	481	476	459	450	-1.0%	-4.6%	-6.5%
60-64	288	308	312	304	6.9%	8.4%	5.6%
65+	355	398	458	521	12.0%	29.2%	46.6%
District Total	23,152	23,364	24,595	26,932	0.9%	6.2%	16.3%

Table 10 shows that if the District were able to increase the market shares of working-aged adults by 5% for each 5-year period, enrollments would grow by about 3,800 students. The projected enrollment growth is higher than the baseline scenario but lower than the increase in market shares for younger students discussed above. This result is due to the fact that SMCCCD depends more heavily on younger adults for its enrollments, and the demographic trends work in favor of younger adults more than they do working-aged adults in the relevant counties.

Scenario D: Increase Older Student Market Shares

In the fourth set of enrollment projections, the market shares of older adults (ages 55 and over) within each race/ethnicity category and county of residence were assumed to increase by 5% for each 5-year period. Table 11 shows the corresponding aggregate enrollment projections.

Table 11. Summary of Enrollment Projections from 2015 to 2030 – Scenario D

					% Change from 2015		
Totals by College	2015	2020	2025	2030	2020	2025	2030
Skyline College	8,921	8,921	9,307	10,121	0.0%	4.3%	13.4%
Canada College	5,686	5,610	5,791	6,189	-1.3%	1.8%	8.8%
College of San Mateo	8,545	8,493	8,809	9,518	-0.6%	3.1%	11.4%
District Total	23,152	23,023	23,907	25,827	-0.6%	3.3%	11.6%
					% Change from 2015		
District Totals by Race	2015	2020	2025	2030	2020	2025	2030
White	6,352	6,115	6,124	6,428	-3.7%	-3.6%	1.2%
Black	858	814	765	734	-5.1%	-10.9%	-14.5%
Hispanic	5,533	5,476	5,812	6,206	-1.0%	5.0%	12.2%
Other	10,409	10,619	11,206	12,459	2.0%	7.7%	19.7%
District Total	23,152	23,023	23,907	25,827	-0.6%	3.3%	11.6%
					% Change from 2015		
District Totals by Age	2015	2020	2025	2030	2020	2025	2030
15-19	5,456	5,555	5,925	6,478	1.8%	8.6%	18.7%
20-24	8,208	8,228	8,690	9,593	0.2%	5.9%	16.9%
25-29	3,233	3,287	3,365	3,679	1.7%	4.1%	13.8%
30-34	1,839	1,552	1,584	1,667	-15.6%	-13.9%	-9.4%
35-39	1,093	1,073	925	960	-1.9%	-15.3%	-12.1%
40-44	889	854	860	761	-3.9%	-3.2%	-14.4%
45-49	694	661	654	670	-4.7%	-5.8%	-3.5%
50-54	616	573	548	545	-6.9%	-11.0%	-11.5%
55-59	481	500	506	521	3.9%	5.2%	8.2%
60-64	288	323	344	352	12.2%	19.5%	22.3%
65+	355	418	505	603	17.6%	42.4%	69.8%
District Total	23,152	23,023	23,907	25,827	-0.6%	3.3%	11.6%

As in Scenario C, the increased market shares for older adults in Scenario D would lead to an enrollment increase of about 2,700 students. This increase is larger than under the baseline scenario but is smaller than would occur if the market shares for younger or middle-aged adults were increased by the same 5%. It should also be noted that older adults are

unlikely to enroll for the same number of courses that younger adults take and would enroll most likely in courses in fields of personal interest.

Scenario E: Increase All Market Shares

In the final scenario, the market shares of all students within each race/ethnicity category and county of residence were assumed to increase by 5% for each 5-year period. Accordingly, this scenario is the accumulation of the projections from Scenarios B, C, and D. Table 12 shows the corresponding aggregate enrollment projections. In this simulation, total enrollments for the SMCCCD district would be projected to rise by 6,500 students, or 28.1%, between 2015 and 2030. The increase would be several percentage points higher for Skyline College and the College of San Mateo. With regard to race/ethnicity, enrollment increases would be projected for all race categories except black students. Finally, the age distribution of students attending SMCCCD colleges would decrease as younger adults comprise an even greater share of total enrollments due to demographic trends in San Mateo and the surrounding counties.

Table 12. Summary of Enrollment Projections from 2015 to 2030 – Scenario E

					% Change from 2015		
Totals by College	2015	2020	2025	2030	2020	2025	2030
Skyline College	8,921	9,345	10,211	11,631	4.8%	14.5%	30.4%
Canada College	5,686	5,873	6,346	7,101	3.3%	11.6%	24.9%
College of San Mateo	8,545	8,895	9,661	10,933	4.1%	13.1%	28.0%
District Total	23,152	24,113	26,219	29,666	4.1%	13.2%	28.1%
					% Change from 2015		
District Totals by Race	2015	2020	2025	2030	2020	2025	2030
White	6,352	6,387	6,680	7,329	0.6%	5.2%	15.4%
Black	858	851	837	840	-0.8%	-2.5%	-2.1%
Hispanic	5,533	5,741	6,386	7,144	3.8%	15.4%	29.1%
Other	10,409	11,133	12,316	14,352	7.0%	18.3%	37.9%
District Total	23,152	24,113	26,219	29,666	4.1%	13.2%	28.1%
					% Change from 2015		
District Totals by Age	2015	2020	2025	2030	2020	2025	2030
15-19	5,456	5,833	6,532	7,499	6.9%	19.7%	37.4%
20-24	8,208	8,639	9,581	11,105	5.3%	16.7%	35.3%
25-29	3,233	3,451	3,710	4,258	6.7%	14.8%	31.7%
30-34	1,839	1,629	1,746	1,929	-11.4%	-5.0%	4.9%
35-39	1,093	1,126	1,020	1,112	3.0%	-6.7%	1.7%
40-44	889	897	948	880	0.9%	6.7%	-1.0%
45-49	694	694	721	775	0.0%	3.9%	11.7%

Table 12. Summary of Enrollment Projections from 2015 to 2030 – Scenario E							
50-54	616	602	604	631	-2.3%	-1.9%	2.5%
55-59	481	500	506	521	3.9%	5.2%	8.2%
60-64	288	323	344	352	12.2%	19.5%	22.3%
65+	355	418	505	603	17.6%	42.4%	69.8%
District Total	23,152	24,113	26,219	29,666	4.1%	13.2%	28.1%

Summary

The enrollment projections for SMCCCD illustrate that population trends in San Mateo and surrounding counties should provide opportunities for growth across the district over the next fifteen years. Figure 1 summarizes the main enrollment projections under the five different scenarios considered in this report. Even in the baseline scenario (A) where SMCCCD maintains the same market shares from 2015 to 2030, the district would experience more than 10% growth in enrollments. The opportunities for growth increase if the SMCCCD colleges are able to make small but sustained increases in their market shares, particularly for younger adults.

Figure 1. Summary of SMCCCD Enrollment Projections by Scenario