June 2012

Understanding the Evolving Market for Initial Teacher Preparation Programs

Changing Student Preferences and the Rise of "Alternate" Routes to Initial Teacher Certification

Enrollments in teacher education have been in flux in recent years. Many institutions report to see enrollment declines across a number of initial teacher preparations, and concerns exist about whether this is a short-term or long-term trend. Leaders at schools and colleges of education across the country have begun to question the reasons for this trend, and an acute need has emerged for information that will provide insight and guide strategic decision-making. What is the future of university-based teacher preparation? Schools of education must understand the direction of the "market" for initial teacher preparation programs as some encounter troubling enrollments, and as all leaders consider developing potential innovative models for programs that meet the needs of future classroom teachers.

In light of this need for data-based guidance, Eduventures analysts have compiled and reviewed relevant information from multiple sources that provide insight into the initial teacher preparation market, including the U.S. Bureau of Labor Statistics, the National Center for Education Statistics, Title II data, and U.S. Census Data, among others. In addition, Eduventures has mined its considerable archive of in-house survey data from 2011 to understand how student preferences are driving enrollments in particular types of teacher preparation programs. Eduventures has leveraged all of this combined information, along with its market intelligence gathered from its national membership of schools and colleges of education, to make projections for future enrollments and trends across various types of teacher preparation programs, and to provide recommendations to institutions on how programs can best be positioned for maintained or growing enrollment in the future.

Schools and colleges of education collectively prepare more teachers than any other organizations in the nation. In order to make data-based, strategic decisions, it is imperative for university leaders to understand how the education "market" will affect enrollments in teacher preparation programs in the short- and long-term.

The key questions addressed in this report include:

- *What is the projected short- and long-term demand for teacher preparation programs?*
- *How have "alternate" routes to teacher certification changed the market for teacher preparation programs?*
- *What are the market estimates and projections for undergraduate and graduate university-based teacher preparation programs?*
- *What preference do potential students have for programs that prepare them to become teachers?*

Contents

Executive Summary

Over the next 2-3 years, overall, enrollments will not grow significantly in initial teacher preparation programs. However, growth will be renewed in the long-term. Short-term growth will be hampered by challenging occupational conditions such as new, controversial compensation packages and layoffs that will likely continue to receive press via local and national media outlets. This trend will continue until policy debates around educational legislation and teacher quality subside after the reauthorization of the Elementary and Secondary Education Act, and/or when states' financial situations have improved and teacher layoffs become less common. These conditions will likely persist for 2-3 years into the future at minimum, reaching into the 2013-14 or 2014-15 academic year. Beyond that, in the far-term, occupational conditions may improve and demand for teachers nationally will increase, especially in states where high numbers of teachers are expected to retire and PreK-12 enrollment will grow significantly, including several states in the South and West. This increased demand will drive renewed enrollment growth nationally in initial teacher preparation programs.

Nationally, enrollment in undergraduate programs in education has declined; enrollment in graduate programs in education has increased marginally; and enrollment in "alternate" route programs reflects the strongest growth. There is strong evidence of decline in recent years for "traditional" undergraduate initial teacher preparation programs; however, at the national level, these enrollment declines have been offset by gradually increasing enrollments in post-baccalaureate certificate programs, bachelor's/master's combination programs such as the 5-year M.A.T., and master's only certification programs. Enrollment trends may vary at the state or regional level, however, depending on the number and type of providers of initial teacher preparation programs and their characteristics.

Unquestionably, the strongest growth in the initial teacher preparation market has been across non-university-based teacher preparation programs that offer "alternate" routes to certification. While universities have also grown to offer "alternate" route programs, programs situated outside of the university have experienced the most growth, driven by increased funding from both the public and private sectors, as well as popularity among school districts, policymakers, and the media. Student preference data indicates that career-changers seek programs that offer quick entry in the classroom and that are affordable, and "alternate" route programs are attractive to this group with 1 in 4 adults entering the teaching profession preferring to enroll in an "alternate" route program that is non-university-based. These programs have grown considerably to control a formidable share of the market over time, and the strong support they have garnered from various sectors will ensure that they retain this share and continue to grow in the future.

Market research suggests that university based "alternate" route models may have the ability to compete with non-university-based programs in the long-term; however, university development of such programs has been slower, contributing to limited growth in this sector. While enrollments in non-university-based "alternate" route programs have grown rapidly in recent years, enrollments in university-based "alternate" route programs has not. This is likely due to low university mobilization to develop these teacher preparation models and limited funding for development. Survey data from career-changers indicates that the majority of adults seeking to enter the teaching profession prefer to enroll in university-based

programs; however, the attributes of quick entry into teaching and cost are also extremely important to this student audience. This group also values online learning, with only 3% indicating that their first preference is campus-based teaching and learning. Sixty-nine percent of career-changers surveyed prefer some type of hybrid face-to-face or online model and 29% prefer a totally online learning modality. This data certainly indicates that significant scope exists for universities to develop highly marketable innovative "alternate" route models or online models for initial teacher preparation programs to serve the needs of the career-changer audience and compete more strongly with non-university-based "alternate" routes.

Affordability is a key factor in future teachers' enrollment decisions. Undergraduate education students are particularly price sensitive when compared with undergraduates planning to major in other fields of study. Data indicates that affordability, the opportunity to work while attending school, and financial aid opportunities are key factors in undergraduate education students' enrollment decisions. Across the country, undergraduate education enrollments are projected to decline and the competition for enrollments at the baccalaureate level may be high. In following, private institutions or institutions with relatively higher price points in their region/state may have a more difficult time maintaining or growing enrollment among "traditional" undergraduate education students. Should these schools seek to maintain enrollments in these programs, care should be taken to highlight opportunities for financial aid and additional value-add attributes, such as service learning opportunities, small class sizes, and small student-faculty ratios.

The Bottom Line: *Nationally, schools of education will need to prepare for maintained enrollment in graduate-level initial teacher preparation programs and continued declining enrollment in bachelor's-level programs in the near-term. While bachelor's-level initial certification programs are declining, they are still the largest producers of teachers nationally by far, and programs are far from disappearing across the teacher preparation landscape. Institutions with higher price points, such as private institutions, should be prepared for more acute enrollment decline at the bachelor's level, as potential undergraduate education students are price-sensitive and large numbers will seek out lower-cost options offered by public universities. Schools of education can look to graduate-level teacher preparation programs to provide scope for growth and innovation. Across the career-changer market, which centers on meeting the needs of adult learners, competition for enrollments is fierce as non-university-based "alternate" route programs receive increased funding and media attention and are growing rapidly. Career-changers see universities as having a strong brand/reputation in the teacher preparation market; however, their need for program brevity drives them to strongly consider non-university based programs. Schools of education have the opportunity to develop programs that are attractive to adult learners, such as online programs or university-based "alternate" programs, but, to-date, the development of such programs has been slow in comparison to the non-university-based sector, which has contributed to limited growth across university-based graduate-level teacher preparation programs.*

If your school of education's initial teacher preparation enrollments are declining, there are a number of factors that could be contributors to this trend depending on your mix of credentials, program models, and your regional/state market. You could be contending with one or more of the following market factors, and you can consider the following strategies to maintain enrollments:

Institution is located in a state/region with a relatively weaker projected demand for teachers	*Effective program differentiation is crucial in maintaining enrollments in regions/states where market conditions lead to fierce competition for enrollments. Consider the development of graduate-level online programs or accelerated "alternate" model programs that are attractive to career changers. Emphasize opportunities for service learning and small class size (as relevant) to potential undergraduates. Also emphasize affordable cost and/or financial aid opportunities to potential students, particularly undergraduates who are considerably cost-conscious.*
Institution is located in a state/region with a high number of providers of initial teacher preparation programs	
Institution is located in a state/region with a significant, growing number of "alternate" route providers	*You institution is likely losing potential enrollments to competitor "alternate" programs that may be more affordable and/or offer quicker entry into teaching. Consider the development of a university-based "alternate" route. Career-changes have a strong affinity for university-based programs and institutions can leverage their reputation by building programs with competitive models. In addition, consider incorporating online coursework, which is attractive to potential students, in particular, career-changers at the graduate level.*
Institution relies heavily on enrollments from bachelor's level teacher education programs	*Consider developing post-baccalaureate programs or other graduate-level programs that lead to initial teacher certification, including five-year M.A.T programs which have experienced limited growth in recent years. Bachelor's level programs are projected to continue to decline in enrollment and graduate-level programs are more likely to maintain/grow enrollment in the near-term.*
Institution's price point is relatively higher than other initial teacher certification options in the region/state	*Programs with higher price points will be hard-pressed to compete for enrollments. For future teachers, affordability is a critical factor in the decision to enroll. Consider highlighting financial aid or work-study opportunities to potential undergraduate students and effectively differentiate your program based on quality, lower faculty-student ratio, service learning, accelerated coursework, or other areas that potential students will find value-add.*

If the strategies listed above are not a strong fit for your school of education, then it may be necessary to adjust your resource alignment to plan for continued reduced enrollments in the near-term.

Consider commissioning a regional or state-specific analysis of your unique teacher certification market. This analysis can provide more insight into the unique factors that are affecting, or that could affect, your school of education's initial teacher certification program enrollment and more specific recommendations for your school of education.

Findings

Occupational Outlook

Teaching continues to be a challenging profession in the current climate, and in the short-term, difficult conditions and negative press will contribute to slower growth for enrollments in teacher preparation programs. There are heated debates across the field regarding how teacher quality can be measured effectively, and, in following, how teacher quality could or should be linked to compensation. Recent legislation and policy at the national level, such as Race to the Top and state waivers for No Child Left Behind, have suggested that teacher salary should not be linked directly to the completion of various degrees or credentials, and changing state policy has led to dissatisfaction across the profession. Furthermore, some states are facing historic budget cuts and financial shortages, which in turn is contributing to K-12 school district shortages, and teacher layoffs are not uncommon. Each year in some districts, hundreds—if not thousands—of teachers receive pink slips, and not all of these teachers are hired back. In March of 2012, almost 20,000 teachers in the state of California receive pink slips. Teachers are under immense pressure to increase P-12 student achievement and standardized test scores, in some cases with classrooms that are ill-equipped and with many at-risk students. This pressure, combined with changing education policy and compensation guidelines, along with financial shortages and potential layoffs, have made teaching a challenging occupation for many. The 28th annual MetLife Survey of the American Teacher , released in March 2012, found that 44 percent of teachers are "very satisfied" with their jobs, down from 59 percent in 2009. The last time job satisfaction dipped this low was in 1989.[1] These conditions could likely deter or delay potential students from enrolling in initial teacher preparation programs, at least in the near-term.

> *I think the undergraduate education students at your university and all universities across the state should be warned and encouraged to consider a different degree. Teaching is next to impossible, and I'd warn them to "turn back before it's too late."*
>
> *--Indiana teacher; April 2012*

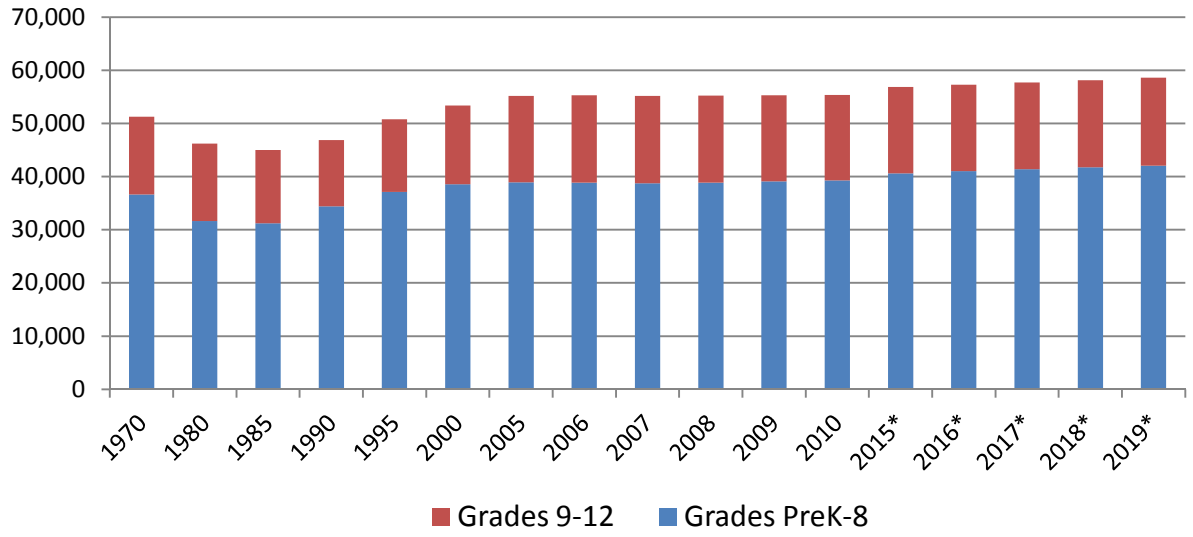
Despite these challenges, thousands of individuals—over 237,000 nationally in 2009-10 (see Figure 5)—still choose to enter teacher preparation programs annually and seek to make a difference in the nation's classrooms. Data referenced in later sections of this report will reveal that, overall, enrollments have not largely decreased across initial teacher preparation programs, though the way teachers choose to enter the profession may be changing somewhat. Furthermore, while in many districts teacher layoffs are widely publicized, in some cases, shortage areas still exist in the near-term—particularly in special education, English as a second language (ELL), or math, science, and technology (STEM) areas.

In the long-term, K-12 enrollments are expected to rise, particularly across early childhood and elementary education grades, which will drive increased demand for teachers in these areas nationally. Figure 1 below illustrates the projected increased K-12 enrollment over time and disaggregated projected enrollment by grades PreK-8 and grades 9-12. By 2019, PreK-12 school enrollment is expected to have increased by 6% nationally to 58,590 students.

[1] MetLife. (2012). *The MetLife Survey of the American Teacher: Teachers, Parents, and the Economy*. Available: http://www.metlife.com/about/corporate-profile/citizenship/metlife-foundation/metlife-survey-of-the-american-teacher.html?WT.mc_id=vu1101

Figure 1. Current and Projected K-12 Student Enrollment in the U.S.

Includes both Public and Private School Enrollment
****Projected***



	Grades PreK-8 Enrollment	Grades 9-12 Enrollment	Total PreK-12 Enrollment
2010	39,312	16,039	55,351
2019* (Projected)	42,083	16,507	58,590
% Change; 2010-2019*	7%	3%	6%

Source: National Center for Education Statistics and Eduventures Analysis

As noted above, PreK-12 enrollment increases will occur primarily in the earlier grades with secondary enrollment remaining fairly consistent over time, which will drive a need for early childhood and elementary teachers, and a comparatively lower need for secondary teachers, particularly for those secondary areas where teacher shortages do not already exist, such as English or history. Occupational projections for teaching by level are provided below in Figure 2 for regular classroom teachers, and provided in Figure 3 for special education teachers.

Figure 2. Occupational Projections for Teachers By Level; 2010-2020

Occupational Title	Employment, 2010	Projected Employment, 2020	Change, 2010-20	
			Percent	Numeric
Kindergarten Teachers, Except Special Education	179,200	211,900	18	32,700
Elementary School Teachers, Except Special Education	1,476,500	1,725,300	17	248,800
Middle School Teachers, Except Special and Career/Technical Education	641,700	750,000	17	108,300
Secondary School Teachers, Except Special and Career/Technical Education	1,037,600	1,109,500	7	71,900

Source: U.S. Bureau of Labor Statistics

Figure 3. Occupational Projections for Special Education Teachers By Level; 2010-2020

Occupational Title	Employment, 2010	Projected Employment, 2020	Change, 2010-20	
			Percent	Numeric
Special Education Teachers Overall	459,600	537,000	17	77,400
Special Education Teachers, Preschool, Kindergarten, and Elementary School	222,800	270,200	21	47,400
Special Education Teachers, Middle School	98,100	117,900	20	19,900
Special Education Teachers, Secondary School	138,700	148,800	7	10,100

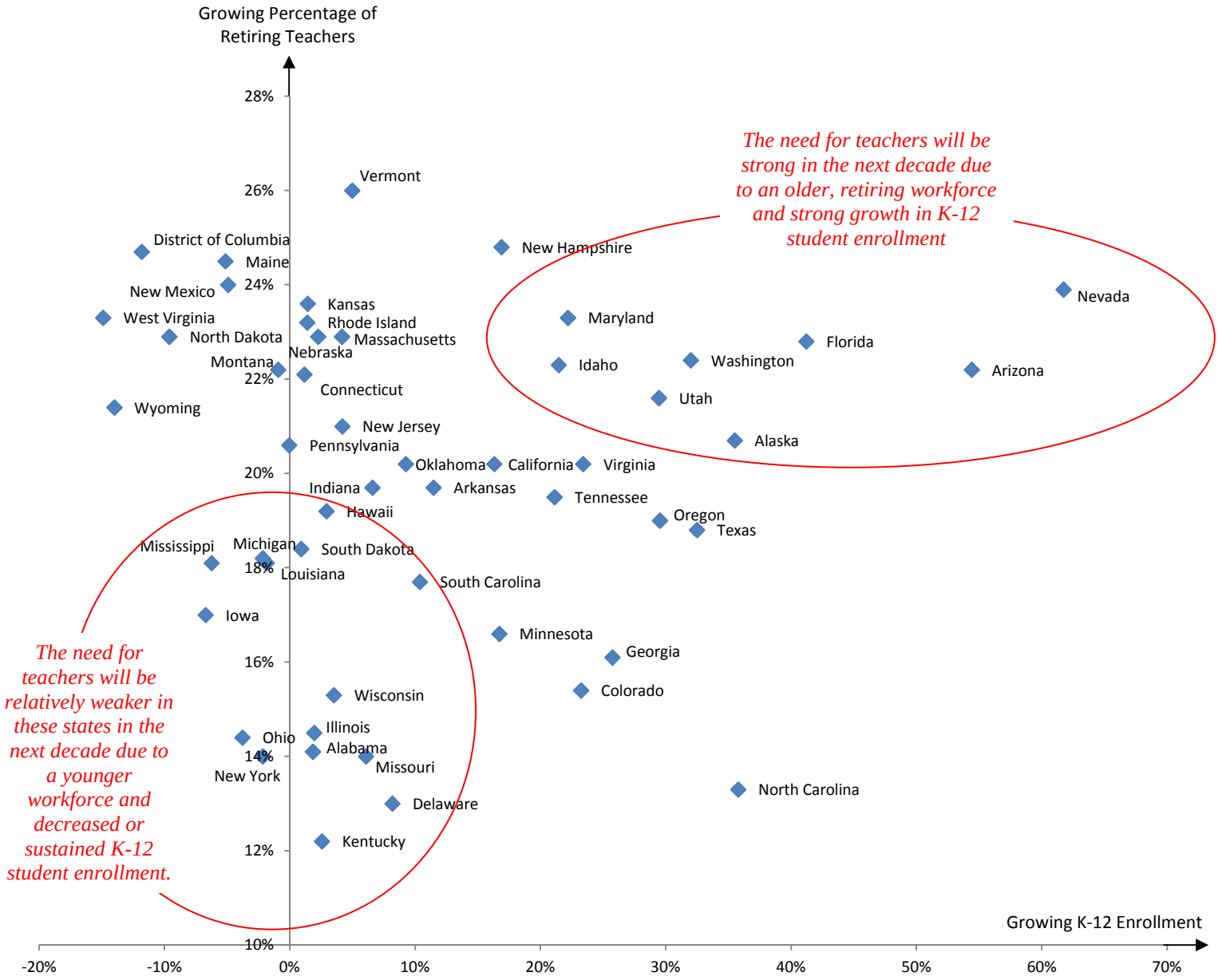
Source: U.S. Bureau of Labor Statistics

In the next ten years, a significant share of the teaching workforce is expected to retire, which will also contribute to an increased demand for teachers. Nationally, about 19% of the nation's 3,114,700 teachers are age 55 or older and expected to retire in the next decade. While the recent recession (and accompanying decreased value of retirement investments) have encouraged some to remain in the workforce longer, investments have increased since 2010 and this trend will not likely continue. Similar to K-12 enrollment projections, the projected retirement rate of teachers varies across states. States with a higher percentage of teachers age 55+ will experience stronger demand for new professionals. Figure 26 in the Appendix of this report provides data on expected retirement by state.

The demand for teachers will vary by state and region of the United States. Changes in PreK-12 student enrollment will fluctuate by state/region of the U.S., and are aligned with overall demographic/population changes across the country. Areas in the South and West will likely experience more growth than areas in the North and East. Projected increases in the population of school-age children by state are provided in Figure 26 in the Appendix of this report. States also have varying projected retirement rates for teachers. Figure 4 below applies these two key market indicators—projected PreK-12 enrollment increases and projected teacher retirement—to demonstrate relative demand for teachers by state. States listed in the upper right hand quadrant of the graph will have relatively higher demand for teachers, including Nevada, Arizona, Florida, and Washington, among others. States listed in the bottom left hand quadrant of the graph will have relatively lower demand for teachers, including New York, Ohio, Kentucky, Delaware, Missouri, Alabama, and Illinois.

Figure 4. Relative Strength in Projected Demand for Teachers By State

X-axis: Projected Percent Growth in Individuals Under Age 18; 2010-2030
Y-axis: Percent of Teachers in State Over Age 55



Source: U.S. Census Bureau, National Center for Education Statistics, and Eduventures Analysis

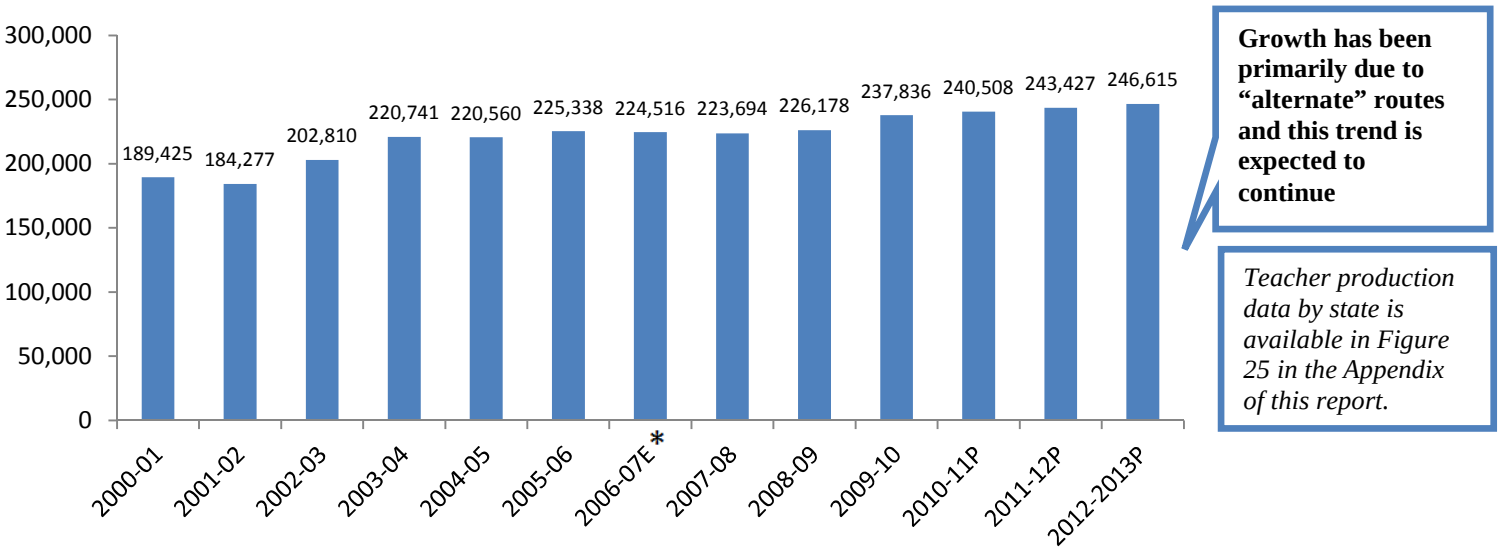
Occupational Outlook: Analysis and Key Takeaways

In the near term, enrollments will not likely grow significantly in initial teacher preparation programs, driven by challenging occupational conditions that have received significant press via local and national media outlets. This trend will continue until policy debates around educational legislation and teacher quality subside after the reauthorization of the Elementary and Secondary Education Act, and/or when states' financial situations have improved and teacher layoffs are rare. These conditions will likely persist for 2-3 years into the future at minimum, reaching into the 2013-14 or 2014-15 academic year. Beyond that, in the far-term, occupational conditions may improve and demand for teachers nationally will increase, especially in states where high numbers of teachers are expected to retire and PreK-12 enrollment will grow significantly, including several states in the South and West. This increased demand will likely serve to drive enrollment in initial teacher preparation programs.

Teacher Production and Market Sizing

In the past decade, the number of teachers prepared across the country has grown, but growth has slowed in recent years. This trend will continue in the near-term. Nationally, across both "alternative" and "traditional" programs, 237,836 individuals completed initial teacher preparation programs in 2009-10—the most recent year for which reported data is available from states, as required by Title II of the *Higher Education Act*. This represents fairly consistent year to year growth (CAGR=2% since 2007-08) in the number of teachers prepared in the United States, and significant growth since the earlier part of the decade. Eduventures analysis suggests that the overall market for initial teacher preparation programs will experience only modest growth from 2010-11 through 2012-2013, with potential for stronger growth in the long-term. Figure 5 below illustrates the number of teacher prepared nationally across the country over the past decade with estimations/projections offered for more recent years.

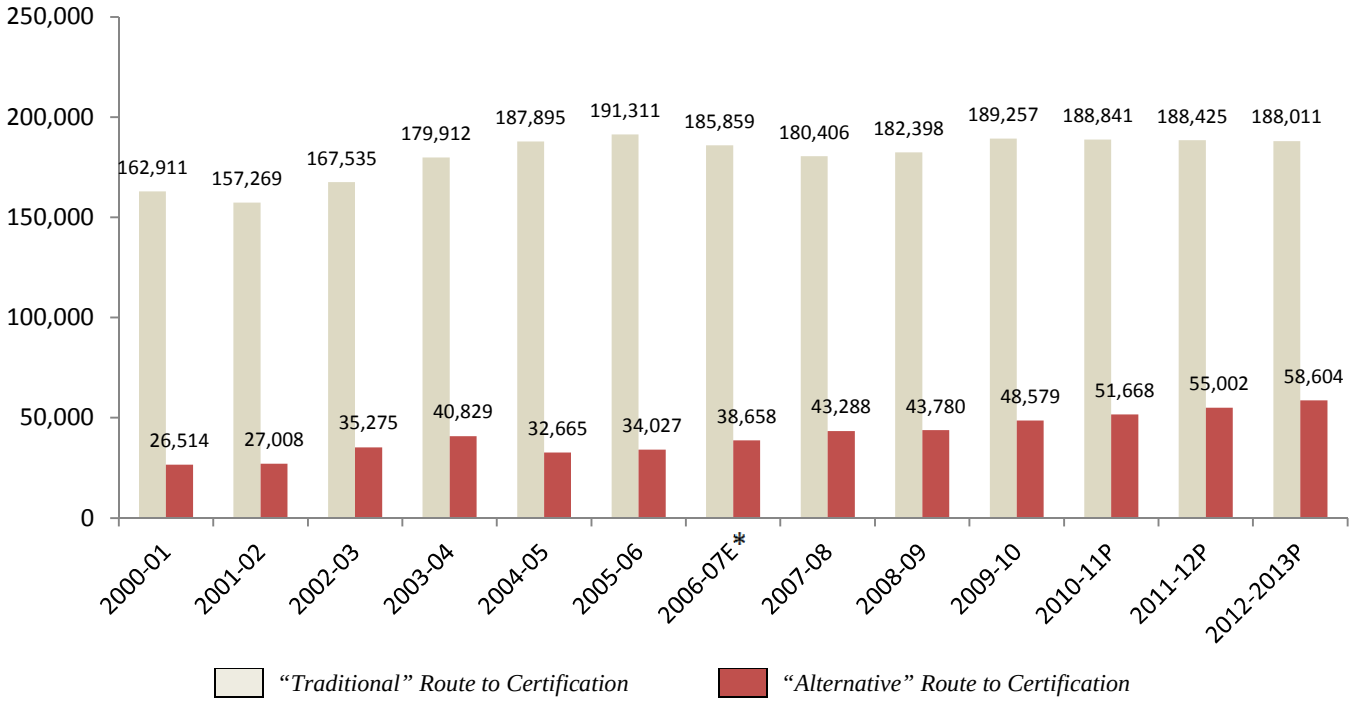
Figure 5. Number of Completers of Initial Teacher Preparation Programs Nationally, By Academic Year



Source: U.S. Department of Education Office of Postsecondary Education Higher Education Act *Title II Reporting System and Eduventures Analysis*
**Title II data was unavailable for 2006-07 and is estimated. Projections based on Eduventures analysis are provided for 2010-11 through 2012-2013*

Data suggests that most of the growth in the overall market for initial teacher preparation programs has occurred within "alternative" routes to initial certification. Figures 6-7 below illustrate this trend. Enrollment within "traditional" routes to teacher certification hit its high point around 2005-06, but has since declined and remains steady in recent years, producing around 188,000-189,000 teachers nationally since 2009-2010. In contrast, while enrollment in "traditional" routes to teacher certification have remained steady, enrollments in "alternative" routes to teacher certification have increased considerably, rising to produce an estimated 55,000 teachers during the 2011-12 academic year. Year to year growth rates in the number of teachers produced via "alternative" routes to teacher certification have risen as high as 16% annually over the last decade, in comparison to a high of 7% for "traditional" routes to teacher preparation.

Figure 6. U.S. Teacher Production Via "Alternative" or "Traditional" Route to Certification



Source: U.S. Department of Education Office of Postsecondary Education Higher Education Act *Title II Reporting System and Eduventures Analysis*
**Title II data was unavailable for 2006-07 and is estimated. Projections based on Eduventures analysis are provided for 2010-11 through 2012-2013*

Figure 7. Year to Year Rate of Growth for the Number of Teachers Produced Via "Alternative" or "Traditional" Routes to Certification

	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007E	2007-2008	2008-2009	2009-2010	2010-2011P	2011-2012P	2012-2013P
Year to Year Rate of Growth for Alternative Teacher Preparation Program Completers	2%	31%	16%	-20%	4%	14%	12%	1%	11%	6%	6%	7%
Year to Year Rate of Growth for Traditional Teacher Preparation Program Completers	-3%	7%	7%	4%	2%	-3%	-3%	1%	4%	0%	0%	0%

Source: U.S. Department of Education Office of Postsecondary Education Higher Education Act *Title II Reporting System and Eduventures Analysis*
**Title II data was unavailable for 2006-07 and is estimated. Projections based on Eduventures analysis are provided for 2010-11 through 2012-2013*

Not only does data suggest that "alternate" route programs have grown overall, but across "alternate" route programs, the significant growth has been among those that are not university-based. Figure 8 below illustrates this trend. Between 2007-08 and 2009-10, non-university-based "alternate" route programs have grown from producing 24,609 teachers annually to 28,834 teachers annually, and this growth is projected to continue in the next three years.

Non-university-based "alternate" route programs have received significant funding and support from policymakers, the press,[2] and in many cases, from current K-12 educators,[3] and this support is driving growth in this sector. In 2010, the three largest foundations providing funding for educator preparation—the Gates Foundation, the Broad Foundation, and the Walton Family Foundation—invested over $509 million into education in 2010. Much of these funds have been given to organizations such as Teach for America (TFA) or other education organizations that are working outside of university settings to produce educators. Private foundations have, in many cases, provided far more support for non-university-based educator preparation organizations than the federal or state governments. Teach for America, for example, has received more than $75 million from Broad and Walton alone, which far outweighs TFA's much celebrated $50 million "scale-up" grant they received from the U.S. Department of Education's 2010 i3 grant competition. Since TFA's founding in 1989, it has placed over 24,000 graduate teachers in high-needs schools across the U.S., and its net assets have grown consistently year over year to over $260 million in 2008, the most recent year for which data is available. The U.S. Department of Education has also funded other non-university-based teacher preparation organizations, including the Academy for Urban School Leadership in Chicago, the Boston Teacher Residency, and the New Teachers Project. The investments federal and state governments and private foundations have made in non-university-based educator preparation organizations are significant factors driving growth in these programs, in addition to the positive press they have received in recent years via media outlets.

> *The school districts have far outpaced the colleges in terms of what's going on…The way we look at it is, they [first-year teachers] come to us with a license, and then we start to teach them how to teach. We don't take for granted that they know very much. That's been going on for a long time, this isn't recent. One of the things we're looking at because of this, with a lot of the other charter groups, is opening up our own credentialing program—High Tech High has done this in San Diego. Then we can influence what happens to them along with way. [The other option would be] partnering with a university that would allow us to have our own employees teaching these classes.*
>
> *–Superintendent of a charter management organization in the Los Angeles area, 2009*

[2] Eduventures, Inc. (2012). *Understanding the Movement for Educator Preparation Reform*.
[3] Eduventures, Inc. (2009). *Deans' and Superintendents' Perceptions of the Top Challenges for P-12 Education and Opportunities for Schools of Education.*

Figure 8. Number of Teachers Produced Via University-Based and Non-University-Based "Alternate" Routes to Teacher Certification

Source: U.S. Department of Education Office of Postsecondary Education Higher Education Act *Title II Reporting System and Eduventures Analysis*
** Projections based on Eduventures analysis are provided for 2010-11 through 2012-2013*

Across "traditional" routes to teacher preparation, undergraduate programs retain the largest market share, followed by master's programs. Based on data from available sources such as the National Center for Education Statistics, Title II data, and Eduventures' in-house survey data from teachers nationally,[4] Eduventures estimates that bachelor's programs in teacher education retain the largest market share, at about 49% of "traditional" university-based enrollments nationally, followed by master's-only programs, which hold an estimated 30% of enrollments. Bachelor's/master's combination programs, such as five or six year Master of Arts in Teaching (M.A.T.) programs, hold an estimated 12% of enrollments in "traditional" university-based programs nationally. This data is outlined below in Figure 9.

Figure 9. Estimated National Market Share of "Traditional" Initial Teacher Preparation Enrollments By Credential, 2011-12 Academic Year

Degree/Credential	Estimated Share of Initial Teacher Preparation Enrollments
Bachelor's Only	49%
Post-Bachelor's Certificate	9%
Bachelor's/Master's Combination	12%
Master's Only	30%

Source: Eduventures Analysis

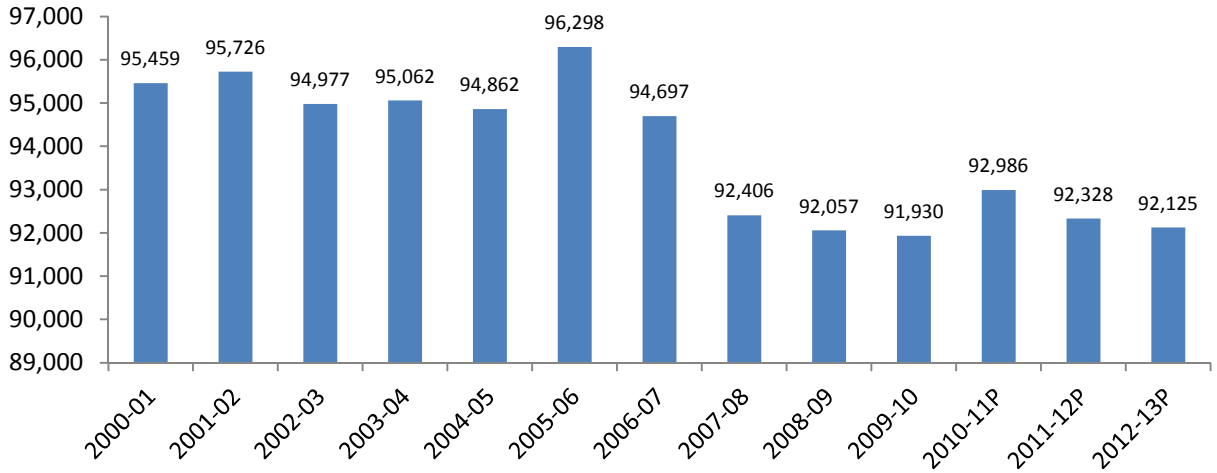
While undergraduate teacher preparation programs are currently producing more teachers nationally than any other programs leading to initial teacher certification, enrollments are declining. In the 2009-10 academic year, Eduventures estimates that 91,930 teachers were produced by undergraduate teacher education programs at the bachelor's level,

[4] For more information, please see the *Methodology* section of this report

declining from 95,459 a decade earlier, in the 2000-01 academic year. During this period of time, the compound annual growth rate (CAGR) was -0.4%. This trend is estimated to continue, as some states move away from general undergraduate teacher preparation programs toward licensure requirements favoring bachelor's programs in content-related areas, and post-baccalaureate or graduate-level education programs that provide additional coursework in teaching pedagogy. Some leaders at schools of education, in addition to stakeholders associated with university-based organizations, have begun to urge the field to move to graduate-level teacher preparation and away from undergraduate teacher preparation,[5] which is also likely contributing to this trend. While enrollment declines have likely been small year over year, they have been steady. Schools of education can expect this to continue in the short- and long-term.

> *There needs to be a major change in how we prepare teachers. We need to move teacher education out of undergraduate education departments where it's just one of fifty-five possible college majors, and move professional preparation of teachers up to a graduate level with people having a firm grasp of science or other content areas at the undergraduate level behind them. The Holmes group has argued that for years; I think T.F.A. and some of the alternative track people are urging that. I certainly am convinced that that's the direction we ought to be going…Let's move this to a professional preparation level, not at an undergraduate level.*
>
> *--School of Education Dean in New York, 2009*

Figure 10. Estimated Number of Bachelor's Degrees Awarded Nationally Leading to Initial Teacher Certification

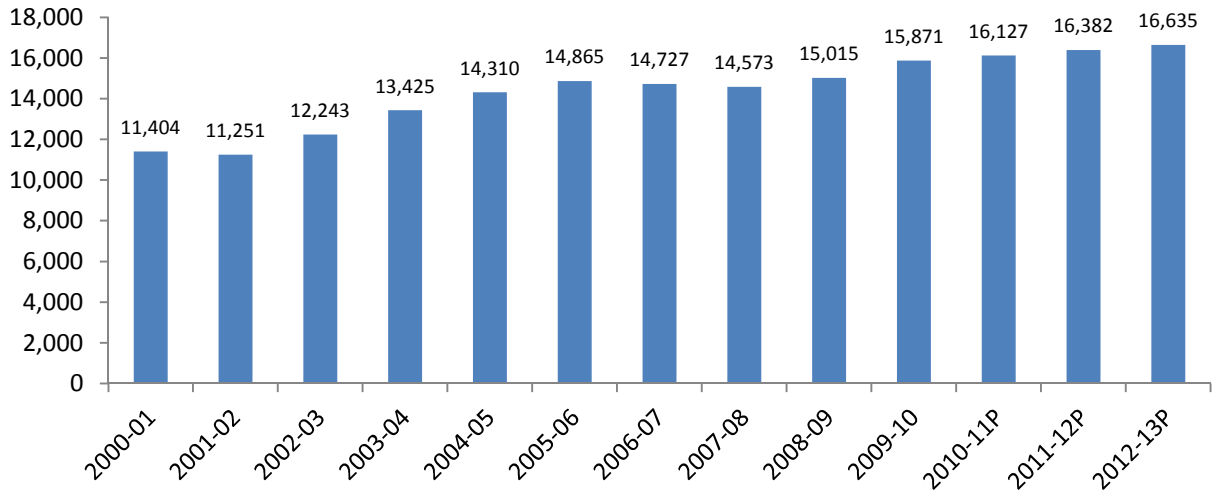


Source: Eduventures Analysis

While undergraduate enrollments in education have declined, there has been some slow growth in enrollments in graduate-level teacher preparation programs. Eduventures estimates that there has been limited growth in enrollments in "traditional," university-based post-baccalaureate certificate programs, bachelor/s/master's combination programs, and master's-only programs in recent years. Figures 11-13 below illustrate this trend.

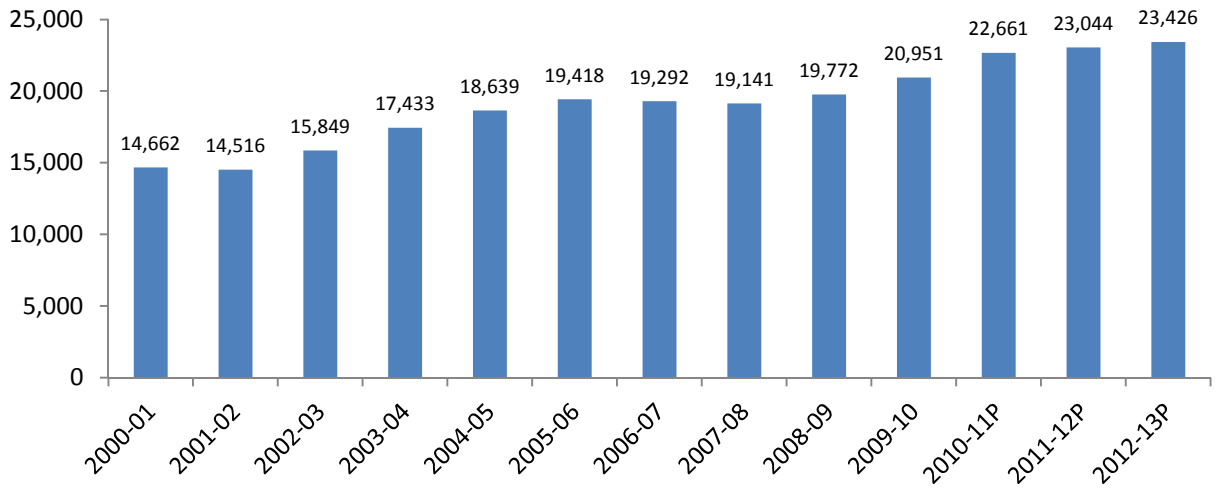
[5] Eduventures, Inc. (2009). *Deans' and Superintendents' Perceptions of the Top Challenges for P-12 Education and Opportunities for Schools of Education.*

Figure 11. Estimated Number of Post-Baccalaureate Certificates Awarded Nationally Leading to Initial Teacher Certification



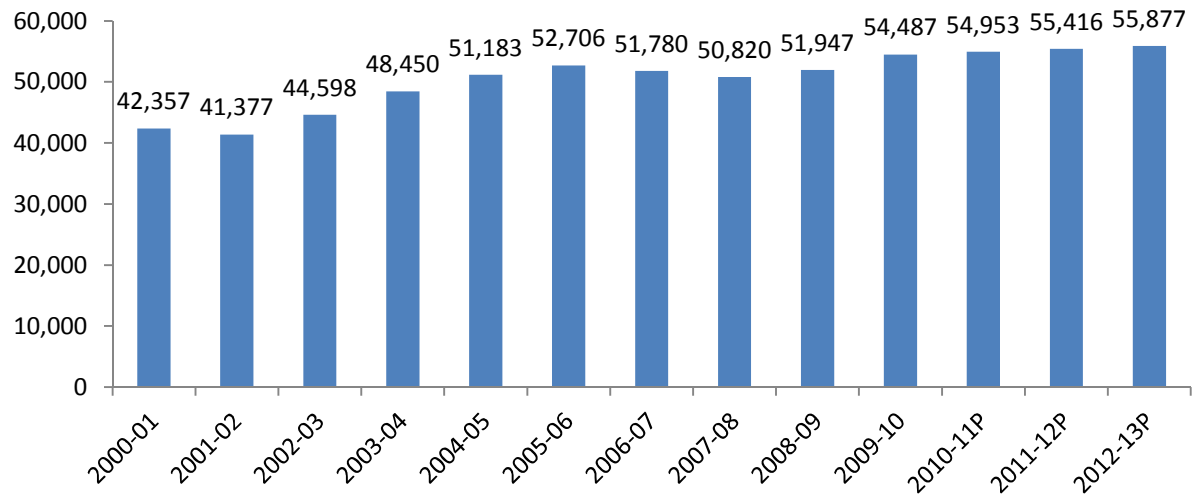
Source: Eduventures Analysis

Figure 12. Estimated Number of Individuals Nationally Completing a Bachelor's/Master's Combination Program Leading to Initial Teacher Certification



Source: Eduventures Analysis

Figure 13. Estimated Number of Individuals Nationally Completing a Master's Degree Leading to Initial Teacher Certification



Source: Eduventures Analysis

While enrollments have grown mildly in "traditional" graduate programs in initial teacher preparation programs, it should not be misinterpreted that the strongest market opportunity for university-based providers lies among post-baccalaureate certificates, bachelor's/master's combination programs, or master'-only programs leading to initial teacher certification. Figure 14 below lists the associated CAGR for each program, in additional to "alternative" programs below. Comparatively, non-university-based "alternative" route to licensure programs have grown most rapidly and the strongest growth opportunity could to be for university-based providers to develop programs that would be competitive across this particular market segment.

Figure 14. Estimated Compound Annual Growth Rate for U.S. Initial Teacher Preparation Programs Over the Past Five Years (2007-08 – 2011-12 Academic Year)

Provider	Program Type	CAGR	Volume of Teachers Produced, 2011-12
University-Based Providers	"Traditional" Bachelor's Program	0.01%	92,125
	"Traditional" Post-Baccalaureate Certificate Program	2.07%	16,635
	"Traditional" Bachelor's/Master's Combination Program	3.45%	23,426
	"Traditional" Master's Only Program	1.47%	55,877
	"Alternative" Route Program	1.89%	21,263
Non-University-Based Providers	"Alternative" Route Program	8.86%	37,341

Source: Eduventures Analysis

Teacher Production and Market Sizing: Analysis and Key Takeaways
Despite many anecdotal claims from schools of education that suggest declining enrollments, overall, across all program types, enrollment is not immediately declining in initial teacher preparation programs across the country. There is strong evidence of decline in recent years for "traditional" undergraduate initial teacher preparation programs; however, these enrollment declines have been offset by gradually increasing enrollments in post-baccalaureate certificate programs, bachelor's/master's combination programs such as the 5-year M.A.T., and master's only certification programs. Unquestionably, the most considerable growth in this market has been across non-university-based teacher preparation programs that offer "alternate" routes to certification. While universities have also grown to offer "alternate" route programs, those programs situated outside of the university have experienced the most growth, driven likely by increased funding from both public and private sectors, as well as popularity among school districts, policymakers, and the media. Data suggests that university based "alternate" route models may have the ability to compete with these non-university-based programs in the long-term; however, university development of such programs has been slower, contributing to limited growth in this sector.

Geographic Analysis: Teacher Supply and Demand

Clearly, while it is valuable to understand national trends in the market for initial teacher preparation programs, state and regional markets are unique and warrant understanding for providers located within those geographic areas. Teacher production—essentially the supply of teachers—and demand for teachers, driven by factors such as PreK-12 student enrollment and the rate of expected job openings due to retirement or career changes for current professionals, vary dramatically across the country by state and region. Data included in Figures 25-26 in the Appendix of this report outlines key indicators for each state, and Figure 4 above references the relative strength in demand by state for new teachers.

Key market indicators suggest that some states exhibit stronger market opportunity for initial teacher preparation programs than others, and some states reflect overly saturated markets for programs. Arizona, Florida, Nevada, New Hampshire, Utah, and Washington state appear to have opportunity for more immediate program growth. Louisiana, and in particular, Illinois, appear to be highly competitive and graduates of programs may have difficulty finding job placements in the state in the near-term. Additional states where the market may be nearing saturation include Mississippi, Missouri, South Carolina, and South Dakota, based on market indicators.

Figure 15. States Exhibiting Notable Market Opportunity or Market Saturation for Initial Teacher Preparation Programs

	State	Key Market Indicators
Market Opportunity	**Arizona**	Arizona produced only 3,162 teachers in 2009-10, with a CAGR of only 2% in the past 3 years. However, there is a projected increase of 54% in the population of school-age children through 2030 and 22% of Arizona's current teaching workforce is over the age of 55 and expected to retire in the near-term.
Market Opportunity	**Florida**	Florida produced 8,439 teachers in 2009-10, with a CAGR of -1% in the past 3 years. While the number of teachers produced each year appears to be declining in the state, Florida's school-age population is expected to increase by 41% through 2030, and 23% of its teachers are age 55+ and will likely retire in the near-term.
Market Opportunity	**Nevada**	Nevada teacher preparation programs produced only 935 teachers in 2009-10, less than half of the teachers the state produced in 2007-08. However, the school-age population is expected to increase by 62% through 2030 and 24% of its current teaching workforce is age 55+ and expected to retire in the coming decade.
Market Opportunity	**New Hampshire**	New Hampshire produced only 908 teachers in 2009-10, a significant decrease from the 1,215 teachers produced in 2007-08 (CAGR=-9%). However, there is 17% growth projected in its school-age population through 2030 and 25% of the state's teachers are age 55+ nearing retirement.
Market Opportunity	**Utah**	Utah is producing slightly fewer teachers in recent years, with a CAGR of -1% from 2007-08 through 2009-10. However, its school-age population is expected to grow by 29% through 2030 and approximately 1 in 5 of its current teaching workforce will reach retirement age in the next decade.
Market Opportunity	**Washington State**	Washington is producing significantly lower numbers of teachers in recent years, with a CAGR of -7% from 2007-08 through 2009-10. However, its school-age population is expected to grow by 32% through 2030 and approximately 1 in 5 of its current teaching workforce will reach retirement age in the next decade.
Market Saturation	**Illinois**	Illinois produced 20,298 teachers in 2009-10, with a CAGR of 37% over the past 3 years. However, the teaching workforce is not expected to grow significantly over the next decade with a relatively small percentage of teachers nearing retirement, and only 2% growth is projected for the school-age population through 2030.
Market Saturation	**Louisiana**	In 2009-10, Louisiana produced 3,076 teachers—significant growth from the 2,073 that were produced in 2007-08. However, despite the rise in the number of teachers produced, the school-age population is predicted to decline by -2% through 2030.

Source: U.S. Department of Education Office of Postsecondary Education Higher Education Act *Title II Reporting System, U.S. Census Bureau, National Center for Education Statistics, and Eduventures Analysis*

Geographic Analysis: Teacher Supply and Demand: Analysis and Key Takeaways
State markets for initial teacher preparation programs are unique. Eduventures encourages schools of education to commission additional, in-depth market analysis for their respective states to provide a more complete picture of market conditions and how institutions can expect them to impact enrollment in teacher education programs and job placement for graduates in coming years. Individual state analyses can include:

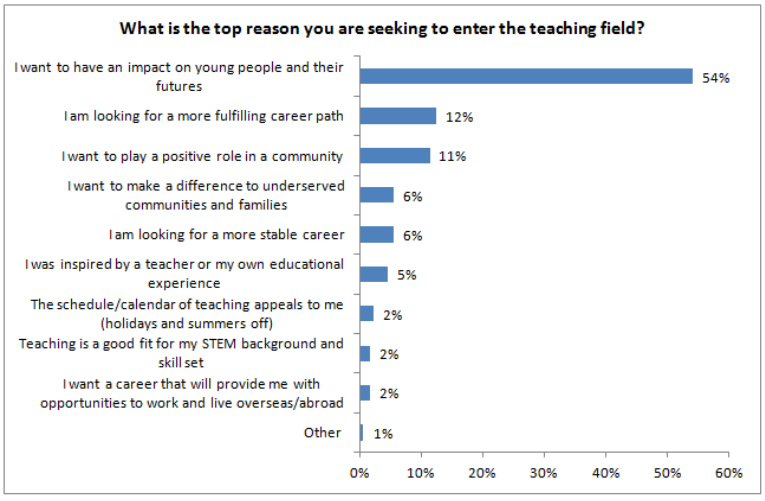
- Projected demand for teachers in your state
- The number of university-based providers in your state and descriptions of various programs' core differentiators
- The number of non-university-based providers in your state and descriptions of various programs' core differentiators and projections of how these programs have impacted university-based enrollment
- State-wide estimations for the number of program completers for undergraduate, graduate, and "alternate" route to certification in your state, with an analysis of trends over time

Potential Student Preferences

Two distinct potential student audiences exist for initial teacher preparation programs, including the traditional (age 18-15) undergraduate student audience, and the career changer audience, which includes adults age 25+ who are interested in moving from their current professional role into teaching. Eduventures in-house survey data provides insight into the programmatic preferences among each of these groups. For more information regarding the methodology that produced this survey data, please see the *Methodology* section of this report.

The career-changer audience is comprised primarily of adults seeking to enter roles where they envision themselves making a positive impact on young people, their community, or underserved populations. Unsurprisingly**,** this potential student base is not motivated by financial reasons, nor are they looking for a stable career. Only 2% of respondents indicated that the top reason for choosing to enter teaching was for the benefits of the schedule (summers & holidays off).

Figure 16.



N=312; Source: Eduventures In-House Survey Data

The largest percentage of career-changers express interest in becoming secondary teachers; however, their areas of study vary with the largest share interested in math. Overall, 44% of surveyed individuals would like to become middle school or high school teachers, as compared to 20% who would like to become elementary school teachers. When asked more specifically about licensure areas, however, it was clear that interest across programs of study were varied, with the highest interest in math, English, or history. Across respondents, a combined 28% indicate an interest in becoming licensed to teach either middle school or high school mathematics.

Figure 17.

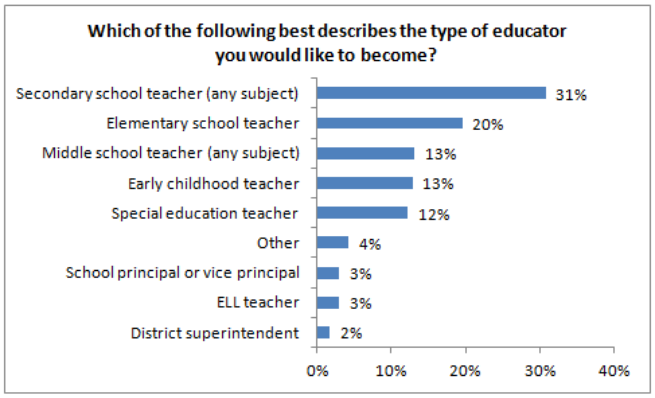
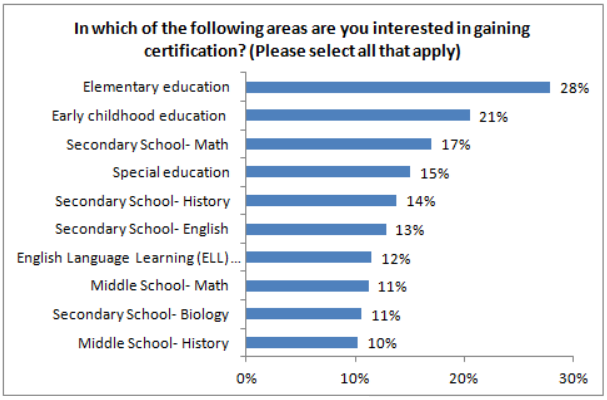


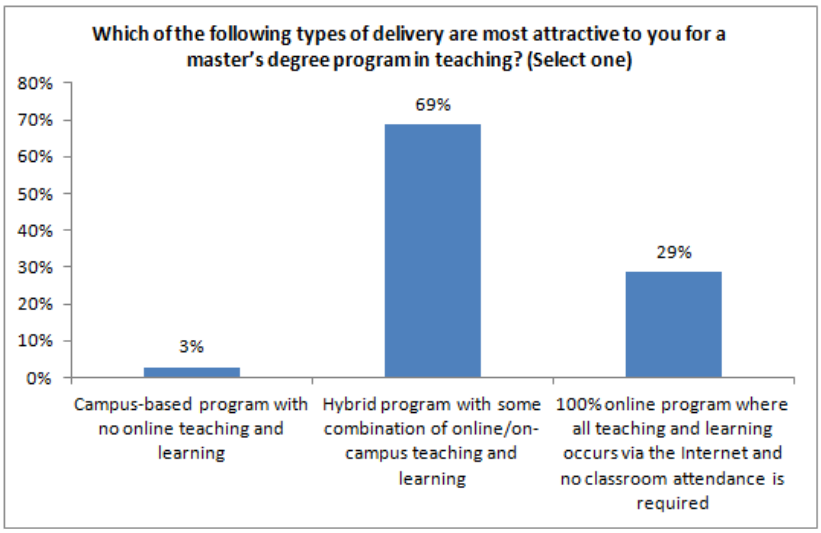
Figure 18.



N=312; Source: Eduventures In-House Survey Data

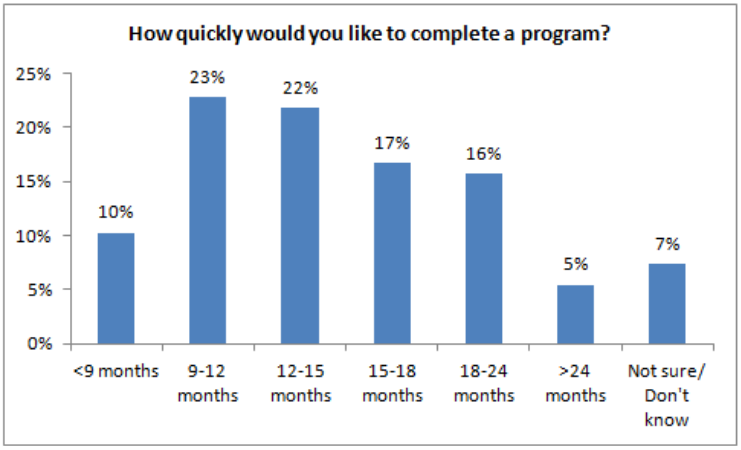
A vast majority of career-changers demonstrate a preference for online teacher preparation programs. Historically, Eduventures research has demonstrated that adult learners indicate strong interest in online degree programs across a number of fields of study, and this preference appears to hold true for initial teacher preparation programs as well. Only 3% of career-changers surveyed indicate that the most attractive delivery model would be purely campus-based, versus 29% who indicate that the most attractive model would be purely online. Remaining respondents express interest in some variation of hybrid online and campus-based learning and teaching.

Figure 19.



N=312; Source: Eduventures In-House Survey Data

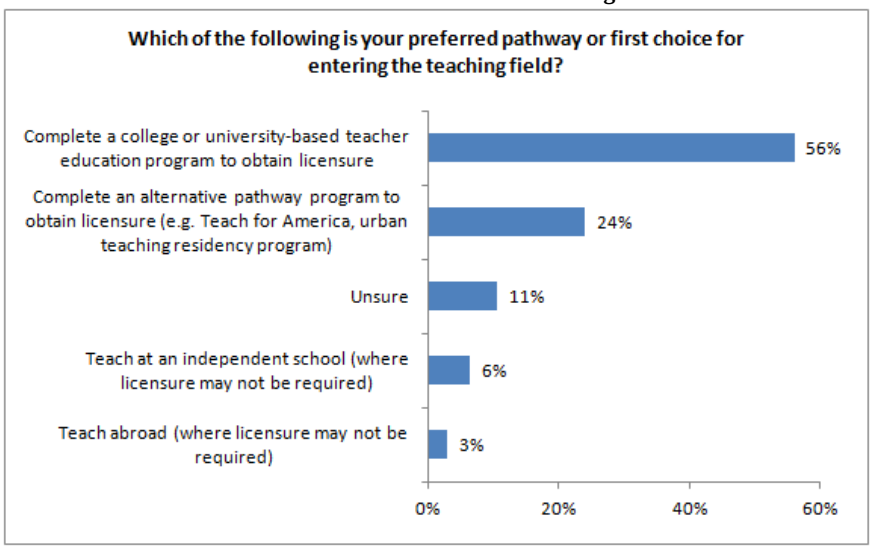
Figure 20.



N=312; Source: Eduventures In-House Survey Data

Career-changers' preferences for program length varied; however, data indicates that these adults tend to prefer shorter programs. Cumulatively, 72% of respondents prefer to complete a master's degree leading to teacher certification in under 18 months. Only 21% of adults indicate that they would prefer for a program to last between 1-1/2 to 2 years, and 7% indicate that they are unsure.

Figure 21.



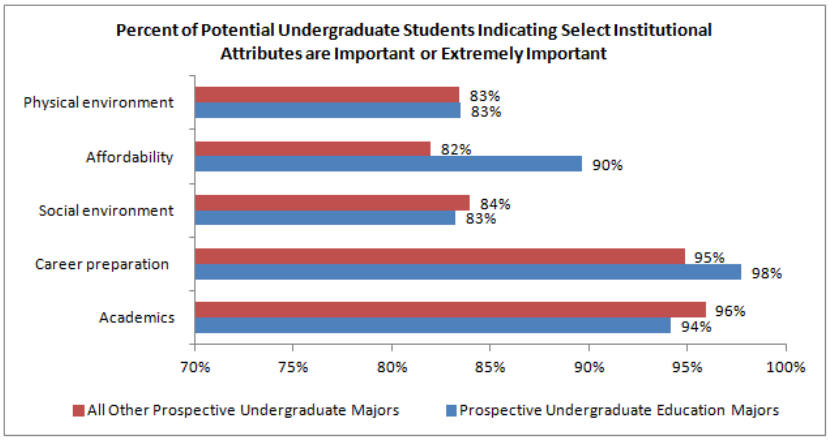
N=312; Source: Eduventures In-House Survey Data

At present, over half of career-changers prefer to enroll in a university-based teacher education program to obtain initial teacher licensure. Fifty-six percent of surveyed career changers indicate that they would prefer to complete a university-based program, as opposed to 24% of respondents who prefer to complete an "alternative" pathway into teaching.

Potential Student Preferences – Career-Changers: Analysis and Key Takeaways

The largest percentage of career-changers are interested in becoming subject-specific middle school or high school teachers, rather than elementary school teachers. One of the most popular subject areas is math – an area where teacher shortages are common in the U.S. The career-changer audience expresses strong preferences for shorter (1-1/2 years or less) online programs at the master's level. These adults are likely acutely conscious of the opportunity cost involved with pursuing additional education to change professions and thus program brevity and/or the ability to study online while still employed full- or part-time are valuable. A significant percentage – almost 1 in 4 – of career changers expresses a preference for "alternate" route programs. These programs' reputations often revolve around quick entry into teaching, which could contribute to their relative popularity across the career-changer audience. While universities remain most popular across this market, institutions should not dismiss the attractiveness of the "alternate" delivery model across this group, in particular for those shortage areas such as math. University-based "alternate" route models or the like may be particularly marketable and would capitalize on both the preference for shorter programs, or even potentially online programs, as well as the strong reputation that universities enjoy among career-changers.

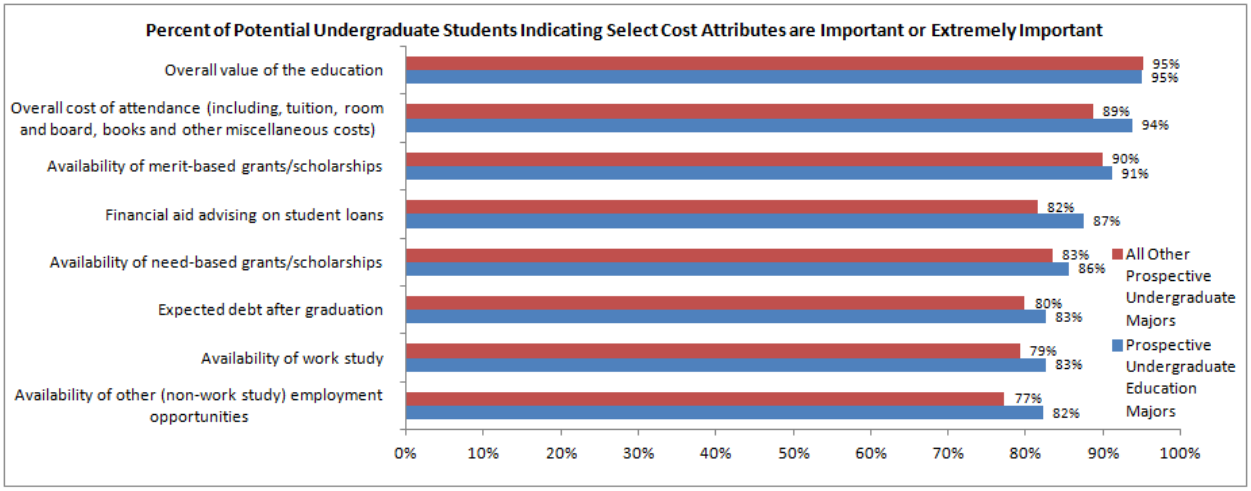
Figure 22.



N=10,082; Source: Eduventures In-House Survey Data

Future undergraduate students planning to major in education are looking for programs that provide value and affordability and career preparation. Eduventures survey data indicates that future undergraduate education students disproportionately value these programmatic attributes when compared to future undergraduate students planning to major in other programs of study, as illustrated by Figure 22. Figure 23 illustrates this in greater detail, however. When weighing enrollment decisions, compared to undergraduate students in other fields, potential undergraduate education students are more likely to value overall cost of attendance, financial aid advising, the availability of needs-based financial assistance, expected debt, and the availability of work study or other employment opportunities while attending school.

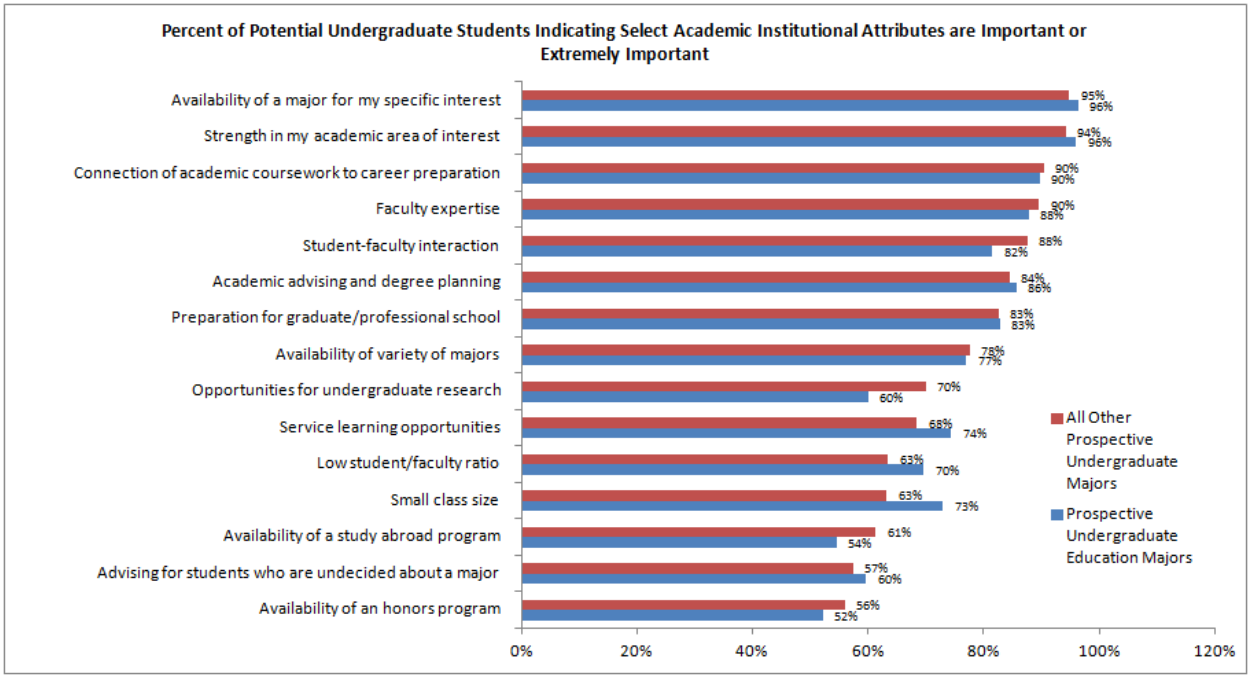
Figure 23.



N=10,082; Source: Eduventures In-House Survey Data

In addition to program affordability, potential undergraduate education students also value service learning opportunities and opportunities to engage directly with faculty. As data illustrated below in Figure 24 indicates, low student-faculty ratios and small class size are more important to potential undergraduate education students when making enrollment decisions when compared with potential undergraduate students in other programs of study. Likewise, opportunities for service learning were more important to potential undergraduate education students than to students planning to major in other fields.

Figure 24.



N=10,082; Source: Eduventures In-House Survey Data

Potential Student Preferences – Undergraduates: Analysis and Key Takeaways

Undergraduate education students are particularly price-sensitive when compared with undergraduates planning to major in other fields of study. Data indicates that affordability, the opportunity to work while attending school, and financial aid opportunities are key factors in undergraduate education students' enrollment decisions. Across the country, undergraduate education enrollments are projected to decline and the competition for enrollments at the baccalaureate level may be high. In following, private institutions or institutions with relatively higher price points in their region/state may have a more difficult time maintaining or growing enrollment among "traditional" undergraduate education students. Should these schools seek to maintain enrollments in these programs, care should be taken to highlight opportunities for financial aid and additional value-add attributes, such as service learning opportunities, small class sizes, and small student-faculty ratios.

Methodology

About Eduventures, Inc.
Eduventures is the industry leader in research, consulting, and advisory services for the higher education community. For nearly 20 years, college and university leaders and education industry providers have looked to Eduventures for innovative and forward-looking ideas, for insights into best practices, and for help with making the strategic and operational decisions vital to their success. Eduventures, Inc. was founded in 1993 and its central offices are located in Boston, MA.

Data providing insight into the demand for teachers nationally and by state has been aggregated from several existing secondary sources, including the U.S. Bureau of Labor Statistics, the National Center for Education Statistics, and U.S. Census data. Data is cited accordingly throughout this report.

The estimates and projections for market share by credential/program provided in this report have been made by Eduventures with guidance from the following existing data sets:

- The U.S. Department of Education Office of Postsecondary Education (Higher Education Act Title II Reporting System).
- The National Center for Education Statistics Integrated Postsecondary Education Data System (IPEDS).
- The Professional Education Data System (PEDS) managed by the American Association of Colleges for Teacher Education (AACTE)
- Data reported by states to the National Center for Education Information (NCEI).

It should be noted that Title II reporting leaves definitions of "alternate," "traditional," and "IHE-based" or "not IHE-based" somewhat vague, and each state is allowed to categorize programs using its own definition. These definitions may vary somewhat nationally. Title II provides the following guidelines to states:

- **Alternative route teacher preparation programs** primarily serve candidates that are the teacher of record in a classroom while participating in the route. For purposes of Title II reporting, each state determines which teacher preparation programs are alternative routes. Furthermore, states are asked to determine whether alternative route programs are **"IHE-based"** or **"not IHE-based,"** meaning whether or not they are primarily offered via an Institution of Higher Education (IHE):
    - While no common definition for "IHE-based" is provided by the Title II reporting system, anecdotal data and secondary information such as "Frequently Asked Questions" regarding Title II reporting guidelines seems to indicate that most states are categorizing "IHE-based" as those alternate route programs that exist almost entirely under the umbrella of the institution and are not offered in partnership with an outside organization such as Teach for America. In following, Teach for America, one of the largest alternate route programs nationally, is likely reported by states as "not IHE-based."
- **Traditional teacher preparation programs** generally serve undergraduate students who have no prior teaching or work experience, and lead at *minimum* to a bachelor's degree. Some traditional teacher preparation programs may lead to a post-baccalaureate teaching credential or certificate but not to a degree. Some traditional teacher preparation programs may lead to master's degrees or a Master of Arts in Teaching (M.A.T.) degree.

The National Center for Education Information[6] provides the following definition for **"alternate route"** teacher preparation programs: *Alternative routes to teacher certification are state-defined routes through which an individual who already has at least a bachelor's degree can obtain certification to teach without necessarily having to go back to college and complete a college, campus-based teacher education program.* Furthermore, NCEI provides the following as "common characteristics" of alternate route teacher preparation programs:

- *Routes specifically designed to recruit, prepare and license talented individuals who already had at least a bachelor's degree – and often other careers – in fields other than education.*
- *Rigorous screening processes, such as passing tests, interviews, and demonstrated mastery of content.*
- *Field-based programs.*
- *Coursework or equivalent experiences in professional education studies before and while teaching.*
- *Work with mentor teachers and/or other support personnel.*
- *High performance standards for completion of the programs.*

Data regarding potential student preferences for initial teacher preparation programs has been aggregated from existing Eduventures in-house survey data collected in 2011-2012. To understand the preferences of the 'career-changer' audience – adults who already have completed bachelor's degrees and who are interested in pursuing teaching as a career – Eduventures leveraged survey data collected in 2011 from a national audience of 312 potential students interested in enrolling in a master's in teaching program in the next five years. To understand the preferences of the 'traditional student' audience, Eduventures leveraged survey data collected in 2011 from a national audience of 652 potential students—currently high school students anticipating enrolling in undergraduate programs in the next 3 years—who indicate that they plan to major in education. For more information about the survey sample and methodology for either of these two groups, please contact Eduventures.

For more information about this research, please contact Mindy Anastasia, Eduventures Principal Analyst, at manastasia@eduventures.com.

[6] *Alternative Teacher Certification: A State by State Analysis.* (2010). National Center for Education Information. Available: http://www.teach-now.org/intro.cfm

Appendix

Figure 25. Number of Teachers Produced By State and Corresponding Compound Annual Growth Rate

State	2007-08	2008-09	2009-10	CAGR
United States, Overall	**223694**	**226178**	**237836**	**2%**
Alaska	184	235	220	6%
Arizona	2939	3212	3162	2%
Florida	8787	9011	8439	-1%
Idaho	1218	1332	1468	6%
Maryland	2690	2672	3220	6%
Nevada	1910	1012	935	-21%
New Hampshire	1215	988	908	-9%
Utah	2324	2290	2265	-1%
Washington	3164	2728	2519	-7%
Alabama	6138	4985	3762	-15%
Delaware	669	767	667	0%
Illinois	7826	15695	20298	37%
Iowa	2486	2167	2240	-3%
Kentucky	3775	3789	3862	1%
Louisiana	2073	2604	3076	14%
Michigan	7280	6159	6073	-6%
Mississippi	2613	2810	2961	4%
Missouri	4240	4572	5038	6%
New York	28192	26670	22517	-7%
Ohio	7654	6520	6018	-8%
South Carolina	2575	2558	2620	1%
South Dakota	679	733	726	2%
Wisconsin	5593	4749	5437	-1%
Arkansas	2012	1959	2030	0%
California	17603	17407	15005	-5%
Colorado	3251	3345	3222	0%
Connecticut	2269	2193	2035	-4%
District of Columbia	440	451	507	5%
Georgia	6373	7205	6604	1%
Hawaii	619	628	1081	20%
Indiana	6009	5701	4339	-10%
Kansas	1825	1947	2118	5%
Maine	827	878	917	4%
Massachusetts	4796	4669	4441	-3%
Minnesota	4028	4513	4334	2%
Montana	no data	697	848	10%
Nebraska	1588	1631	1558	-1%

New Jersey	7987	6608	5070	-14%
New Mexico	186	207	234	8%
North Carolina	4564	4675	5863	9%
North Dakota	616	662	611	0%
Oklahoma	3295	3087	3047	-3%
Oregon	2124	2221	3105	13%
Pennsylvania	12198	11945	12026	0%
Rhode Island	887	832	883	0%
Tennessee	4292	4730	4880	4%
Texas	24520	24378	39126	17%
Vermont	496	567	584	6%
Virginia	3249	3434	3431	2%
West Virginia	1195	1130	1270	2%
Wyoming	221	220	236	2%

Source: U.S. Department of Education Office of Postsecondary Education Higher Education Act *Title II Reporting System*

Figure 26. Total Number of Teachers, Age Distribution of Teachers, Number of Individuals Under Age 18 and Associated Population Projections, By State

State	Number of full-time teachers	% Teachers under age 30	% Teachers 30-49 years old	% Teachers 50-54 years old	% Teachers older than 55 years or more	Average age of teachers	Number of individuals under age 18; 2010	Number of individuals under age 18; 2030 (Projected)	% Change, individuals under age 18; 2010-2030*
United States, Overall	**3,114,700**	**18.0**	**50.1**	**13.3**	**18.7**	**42.2**	**74,431,511**	**85,707,297**	**15%**
Alabama	49,100	19.4	55.0	11.5	14.1	40.6	1,092,184	1,112,264	2%
Alaska	7,200	10.7	52.4	16.2	20.7	44.6	183,983	249,293	35%
Arizona	61,100	20.8	42.2	14.8	22.2	42.8	1,688,464	2,607,152	54%
Arkansas	33,300	13.9	51.5	14.9	19.7	43.6	702,656	783,223	11%
California	284,900	15.8	51.1	12.9	20.2	42.8	9,496,978	11,046,140	16%
Colorado	43,600	19.6	53.2	11.8	15.4	40.9	1,188,583	1,464,836	23%
Connecticut	44,300	13.8	50.8	13.3	22.1	43.4	814,008	823,436	1%
Delaware	8,000	19.6	57.9	9.5	13.0	40.2	202,208	218,760	8%
District of Columbia	3,900	21.2	39.7	14.4	24.7	43.1	114,064	100,589	-12%
Florida	169,600	15.2	49.8	12.2	22.8	43.2	4,086,123	5,770,082	41%
Georgia	112,000	18.9	52.0	13.0	16.1	41.5	2,502,386	3,146,624	26%
Hawaii	12,100	21.5	46.0	13.4	19.2	41.5	316,263	325,503	3%
Idaho	14,300	13.6	49.7	14.5	22.3	44.0	400,237	486,088	21%
Illinois	130,300	20.6	49.8	15.1	14.5	40.9	3,196,906	3,259,113	2%
Indiana	63,200	19.0	46.9	14.3	19.7	42.5	1,596,185	1,701,424	7%
Iowa	35,800	18.3	50.2	14.6	17.0	41.8	711,056	663,301	-7%
Kansas	32,700	16.8	46.8	12.8	23.6	43.1	698,996	708,946	1%
Kentucky	40,200	17.7	56.8	13.3	12.2	40.9	1,002,307	1,027,976	3%
Louisiana	45,800	19.2	48.9	13.8	18.1	42.0	1,171,502	1,149,939	-2%
Maine	15,400	12.1	48.8	14.7	24.5	44.8	269,232	255,393	-5%

Maryland	52,500	21.4	42.4	12.9	23.3	42.5	1,406,294	1,718,368	22%
Massachusetts	69,100	18.3	46.1	12.7	22.9	43.3	1,483,853	1,545,614	4%
Michigan	87,700	16.9	54.6	10.3	18.2	41.5	2,487,058	2,433,329	-2%
Minnesota	53,000	15.8	53.3	14.4	16.6	42.4	1,289,963	1,505,527	17%
Mississippi	33,800	19.6	50.2	12.2	18.1	41.6	759,450	712,022	-6%
Missouri	67,200	22.3	52.2	11.5	14.0	40.8	1,411,394	1,497,099	6%
Montana	10,900	13.0	49.2	15.6	22.2	44.5	212,312	210,342	-1%
Nebraska	19,800	15.7	47.1	14.3	22.9	43.8	446,256	456,338	2%
Nevada	22,100	16.0	49.4	10.7	23.9	43.3	665,085	1,075,633	62%
New Hampshire	15,400	14.1	47.6	13.5	24.8	44.8	304,164	355,531	17%
New Jersey	108,100	21.0	47.1	11.0	21.0	42.0	2,088,224	2,175,752	4%
New Mexico	21,400	10.4	49.9	15.7	24.0	45.2	479,405	455,808	-5%
New York	212,900	19.1	53.3	13.5	14.0	41.2	4,420,876	4,325,477	-2%
North Carolina	88,900	21.1	53.9	11.7	13.3	40.5	2,268,838	3,080,611	36%
North Dakota	7,300	14.4	46.3	16.4	22.9	44.1	141,964	128,313	-10%
Ohio	126,400	18.4	53.6	13.6	14.4	41.2	2,744,431	2,640,671	-4%
Oklahoma	43,000	14.0	50.7	15.1	20.2	43.5	895,073	977,929	9%
Oregon	28,100	15.4	47.0	18.6	19.0	43.4	863,166	1,118,070	30%
Pennsylvania	121,400	22.0	43.1	14.3	20.6	41.9	2,747,595	2,746,199	0%
Rhode Island	11,600	11.8	48.6	16.5	23.2	44.1	249,273	252,731	1%
South Carolina	45,900	17.4	49.3	15.6	17.7	42.2	1,036,349	1,143,807	10%
South Dakota	9,500	16.9	48.6	16.1	18.4	43.1	194,152	195,896	1%
Tennessee	63,100	14.9	51.2	14.4	19.5	43.0	1,478,915	1,791,281	21%
Texas	328,900	18.9	51.3	11.0	18.8	42.2	6,785,408	8,990,095	32%
Utah	23,500	21.9	42.1	14.4	21.6	42.5	818,985	1,060,166	29%
Vermont	8,400	11.9	47.2	15.0	26.0	45.0	132,372	138,959	5%
Virginia	87,100	19.1	46.6	14.1	20.2	42.4	1,880,184	2,320,190	23%
Washington	50,100	13.7	49.1	14.9	22.4	44.1	1,488,423	1,964,633	32%
West Virginia	21,200	13.1	43.7	19.8	23.3	45.0	382,311	325,351	-15%
Wisconsin	62,300	15.1	52.1	17.5	15.3	42.9	1,319,144	1,365,476	4%
Wyoming	7,000	13.7	47.6	17.3	21.4	44.0	116,273	99,997	-14%
	Source: National Center for Education Statistics (2008 - the most recent data available at the time this report was published)						*Source: U.S. Census Bureau (2008 Projections - the most recent projections available at the time this report was published)*		