THE NAIS DEMOGRAPHIC CENTER
Metropolitan Area Reports

CBSA[1]: Tampa-St. Petersburg-Clearwater, FL[2]

Metropolitan Area Reports summarize key demographic changes for a specific geographic region, suggest strategic considerations for schools given these changes, and offer resources that can assist schools in dealing with an ever-changing marketplace. For specific demographic reports for your geographic region, please visit the NAIS Demographic Center at www.nais.org/go/demographics.

Key Findings

Increasing School Age Population

1. During 2000–2007, the metropolitan area of Tampa-St. Petersburg-Clearwater reported an increase in the numbers of households with children of school age from 285,183 to 299,768 (a difference of 5.11 percent). This positive trend is expected to continue during the next five years, totaling 343,915 in 2012 (14.73 percent increase).
2. In addition, all school population groups are expected to increase during the next five years, with expected growth rates ranging from 5.63 percent (children ages 10 to 13) to 9.2 percent (children younger than five years old).
3. By gender, the female school population is expected to grow by 6.14 percent by the year 2012, from 290,626 to 308,467, while the male school population is predicted to grow by 7.94 percent, from 315,033 in 2007, to 340,055 in 2012.

Rising Numbers of Young Children and Teenagers

4. In absolute numbers, the largest group in 2007 was children between five and nine years old, at 174,575, followed by children younger than five years old, at 163,442. While both groups recorded the highest percent increases during 2000–2007, at 16.26 percent and 18.58 percent, respectively, they are predicted to continue growing at lower, but still significant rates, reaching 184,571 and 178,478, respectively, by 2012.
5. By age and gender, male children ages five to nine years old are expected to be the largest group in the Tampa-St. Petersburg-Clearwater metropolitan area by 2012, at 98,021. However, other groups are expected to record the highest growth rates: boys younger than five years old, at 9.99 percent, from 84,906 in 2007 to 93,388, in 2012; followed by girls in the same age group, at 8.35 percent, from 78,536 in 2007 to 85,090 in 2012; and male teenagers ages 14 to 17 years old, who are expected to increase at 8.24 percent, from 69,768 in 2007 to 75,516 in 2012.

---

[1] CBSAs are Core Based Statistical Areas, a new census geographic area stemming from the results of the Census 2000. CBSAs combine both Metropolitan Areas (formerly MSAs) and new Micropolitan Areas.

[2] This CBSA area includes the following counties: Hernando, FL 12053; Hillsborough, FL 12057; Pasco, FL 12101; and Pinellas, FL 12103.

6. Given the previous trends, for the next five years, it is anticipated that the nursery or preschool population will expand by 10.39 percent (from 47,628 in 2007 to 52,575 in 2012) while the student population in grades nine to 12 will expand by 10.54 percent (from 143,889 in 2007 to 159,059 in 2012).
7. When broken down by gender, the number of boys attending nursery or preschool is projected to rise by 11.19 percent, from 24,742 in 2007 to 27,510 in 2012; followed by male students attending grades nine to 12 at 11.1 percent, from 75,007 in 2007 to 83,334 in 2012. Also, the female population in grades nine to 12 is anticipated to increase by 9.93 percent during the period 2007–2012, from 68,882 to 75,725.

Growing Numbers of Private School Enrollment

8. Population enrolled in private schools grew by more than 26 percent during the period 2000–2007, from 71,321 to 89,950. Similarly, public school enrollment recorded an increase of more than 20 percent during the same period (from 359,143 in 2000 to 433,102 in 2007). By the year 2012, both private and public schools are expected to grow at lower but still significant rates of 8.18 percent and 9.44 percent, respectively.
9. By gender, during the period 2007 to 2012, male pre-primary enrollment in private schools is anticipated to grow by 11.59 percent, from 15,152 to 16,908, while the female pre-primary enrollment is expected to grow by 9.92 percent, from 14,016 in 2007 to 15,406 in 2012. The 2012 anticipated male and female populations for elementary and high school are 34,105 and 30,885, respectively.

Increasing Numbers of Minority Population

10. By race and ethnicity, the principal changes in the Tampa-St. Petersburg-Clearwater area are the growing numbers of minority groups. 'Other[3] population,' Asians, and Hispanics have increased substantially during the years 2000–2007 at 45.12 percent, 37.79 percent, and 36.88 percent, respectively.
11. While the white population is expected to slightly increase from 2,210,362 in 2007 to 2,356,159 in 2012 (a 6.6 percent increase), minority groups are predicted to continue increasing at a high rate through 2012 — particularly the 'other' population, which is forecast to grow from 172,209 in 2007 to 231,272 in 2012 (34.3 percent).
12. The Hispanic population is also forecast to continue growing at a lower, but still significant, rate of 24.01 percent, reaching 422,086 in 2012. By that year, Hispanics are expected to represent 14.14 percent of the population in this area, almost four percentage points higher than the African-American population, which is expected to represent 10.68 of the total by 2012.

[3] "Other race" includes all other responses not included in the "white", "black or African American", "American Indian and Alaska Native", "Asian" and "Native Hawaiian and Other Pacific Islander" race categories. Respondents providing write-in entries such as multiracial, mixed, interracial, or a Hispanic/Latino group (for example, Mexican, Puerto Rican, or Cuban) are included here.

Considerable Growth of Affluent Families

13. The number of families with school-age children and incomes of at least $100,000 per year is predicted to increase through 2012. In particular, the number of families with children younger than five years old and annual income between $125,000 and $149,999 is expected to increase from 3,441 in 2007 to 6,351 in 2012 (an 84.57 percent increase), followed by families in the same income bracket with children between 14 and 17 years old, who are expected to grow from 2,818 in 2007 to 5,129 in 2012 (82.01 percent). In absolute numbers, the largest group among these families is expected to be families with children between five and nine years old and income between $100,000 and $124,999 at 10,978 by 2012.
14. The number of African-American households with incomes of at least $100,000 per year is projected to continue growing through 2012. In particular, households with an annual income between $125,000 and $149,999 are projected to record an increase of 107.51 percent, from 1,572 in 2007 to 3,262 in 2012. A similar trend is expected for Hispanic households with incomes of at least $100,000 per year. The highest growth rate is projected for Hispanic households with annual incomes between $125,000 and $149,999 at 132.91 percent (from 2,264 in 2007 to 5,273 in 2012).
15. Although their numbers are not that large, the number of Asian households with annual incomes of at least $100,000 a year is also predicted to increase by 2012, especially those households with incomes between $125,000 to $149,999 a year, who are expected to more than double their numbers from 593 in 2007 to 1,476 in 2012 (148.9 percent increase).
16. Likewise, 'other households' with annual incomes of at least $100,000 are forecast to expand. For example, the rate of 'other' families with annual incomes of $100,000 to $124,999 is projected to soar at 270.17 percent, from 1,093 in 2007 to 4,046 in 2012.
17. In general, the number of households with home values of $500,000+ reported record growth numbers during the period 2000–2007. In particular, the number of households with homes valued between $750,000 and $999,999 increased by 1,058.4 percent during this period. A positive trend is expected to continue through 2012, since people who buy a new house tend to move to bigger and more valuable homes. For instance, the number of owner households with homes valued between $500,000 and $749,999 is expected to increase from 15,070 in 2007 to 38,570 in 2012 (a 155.94 percent increase).

Healthy Increase in Population with Higher Education

18. The number of people older than 25 years of age who hold a college degree in this area has increased by 21.15 percent, from 242,621 in 2000 to 293,926 in 2007. This number is expected to continue increasing, but at a lower growth rate by 2012 (10.85 percent). A similar pattern is observed for people older than 25 years old who hold a graduate degree. Their numbers increased from 124,257 in 2000 to 148,932 in 2007 (19.86 percent), and it is forecast that their numbers will continue to grow by 9.95 percent by the year 2012.

NATIONAL ASSOCIATION OF INDEPENDENT SCHOOLS

Strategic Considerations for Schools

Given the finds of this report, independent schools in the Tampa-St. Petersburg-Clearwater metropolitan area need to consider what strategies they will implement now to ensure full classrooms in the years ahead. For example, this may mean diversifying their enrollments further in terms of gender, ethnicity, and income. Some of the questions that schools should consider are:

General Considerations

- Considering these demographic changes, on which areas does our school most need to focus?
- Have we benchmarked our school's admission statistics? How do they look in comparison to other schools in our community? Do we understand the strengths and weaknesses of our own numbers?
- How well do we know our market? Do we know who our competitors are (other independent schools, magnet schools, charter schools, Catholic schools, home schoolers, etc.)? How familiar are people in our community with our school mission and value proposition?
- If we have feeder schools, are we watching their enrollment changes to understand how our school could be impacted?

Responding to Increasing School Age Population

- Does our school have a waiting list? Is the school working at maximum enrollment capacity already? What do our admission statistics look like (inquiries, applications, acceptances, enrollees)? Are there changes that need our attention?
- If our school is in high demand, what tuition policy should it follow?
- What are the demographic changes in the geographic areas from which we recruit students? Are the statistics more favorable in surrounding areas from which we have not traditionally recruited students? Do we need to attract this population?
- What is the typical profile of families in our school? Do we know why they are enrolling their children in our school?

Responding to Racial/Ethnic Changes

- Given the demographic changes, what percentage of students of color should the school aim for? How do our diversity numbers compare to those of this geographic region?
- What are the key characteristics that parents of color are looking for in a school? Does the school highlight these characteristics in its messages?
- What communication channels should the school use to reach out to the people of color in its community? Should the school include other languages in its communications with parents?
- Do we know why families of color who can afford our tuitions are not enrolling their children in our schools? Do we know where these families are located?

Responding to Household Income Changes

- Do we need to attract more middle-class families? Can we increase financial aid or structure it to increase enrollment among middle-class families? If so, can richer families pay for higher tuitions?
- Are middle-class families aware of all the options offered to pursue an education in our school (need-based financial aid, merit awards, tuition payment plans, and tuition loan programs)?
- Are our students' grandparents nearby? What percentage of students have their tuitions paid for by their grandparents? How can we involve grandparents in the life of the school?

Financial Considerations

- If our school is facing high demand, what financial planning do we need to do to ensure a sound use of the resources?
- Are there any building maintenance or improvements that are needed? Can we afford to offer better salaries or benefits? What major investment projects are needed?
- What are the best/most profitable fund-raising activities? Is our school relying mainly on income as a source of revenues? Are there other opportunities for revenue enhancement (non-tuition options) that our school should implement?[4]
- Who are our best donors? What is their profile? Since we are dealing with different generations, do we understand how to attract them? Are they more responsive to mail or online solicitations?
- What types of causes are our donors more inclined to support? How should the school keep them informed about the use of charitable funds?

NAIS Resources that Can Help

1. **Trends** — To stay abreast of changing trends, in addition to the NAIS Demographic Center, school administrators can check the following websites: *www.trendletter.com* and/or *www.hermangroup.com*. Also, the NAIS Opinion Leaders' Survey (free to browse at *www.nais.org* or buy in bulk to share) identifies what demographic, social, economic, political, scientific, and technological trends opinion leaders in education, business, and the media believe would have the greatest impact on independent education. This report also suggests actions that schools should consider now to successfully manage these important trends.

2. **Benchmarking** — To gather data and conduct benchmark analysis, schools can participate in the StatsOnline[5] annual survey (*www.nais.org*) that collects data on

[4] The 2006 NAIS Non-Tuition Survey presents alternative sources of revenue different from tuitions, annual/capital giving, and investments that many schools have in place to achieve the balance between operating expenses and affordability. http://www.nais.org/resources/seriesdoc.cfm?ItemNumber=148270.

admissions, annual giving, financial aid, financial operations, salaries, schools, students, staff, and tuition. Available tools include:

- ✓ **Benchmarking** tools to create custom groups and reports based upon any of the survey variables,
- ✓ **Financing Schools Calculator** to project budgets based on various preferred and possible scenarios to see the impact on the "bottom line" of changes in some of the variables.
- ✓ **Executive Compensation Reports** that you can provide to your board or compensation committee so they can either authorize or perform a comparative compensation study (of salary, other forms of compensation, and benefits) and create a documented “rebuttable presumption” of the reasonableness of the compensation (available only to heads and business managers).

3. **Market Research** — The report, *Marketing Independent Schools to Generation X and Minority Parents* (free to download at *www.nais.org/go/advocacy*), provides information on the factors that are relevant to families of color and Generation X parents when selecting schools for their children. It also gives specific advice on which messages to consider when reaching out to particular groups of families. In addition, the NAIS Public Opinion Poll (for NAIS members only, free to download at *www.nais.org/go/advocacy*) provides information on characteristics the American public associates with a quality education and their perceptions of independent schools. It also includes implications and recommendations for ways schools can communicate with constituents about the value of independent education.

4. **Advocacy and Marketing** — NAIS has created several resources to help you in communicating with important constituents like prospective students and families, prospective teachers, the media, and policymakers. They can help you explain the value of independent education and of your school:
   - ✓ *Values Added: The Lifelong Returns of an Independent School Education* (free to download at *www.nais.org/go/advocacy*).
   - ✓ Admission and Marketing Tools (brochures, ad templates, video clips, etc. at *www.nais.org/advocacy*).
   - ✓ *Communications Handbook* (free to download at *www.nais.org/go/advocacy*)
   - ✓ Parent Admission Brochure (view a sample as a pdf or purchase copies from the online bookstore at *http://transact.nais.org/Purchase/SearchCatalog.aspx*).
   - ✓ *Penny-Wise: Paying for Your Child’s Independent School Education* (view a sample as a pdf or purchase copies from the online bookstore at *http://transact.nais.org/Purchase/SearchCatalog.aspx*).

[5] StatsOnline is available to the five key administrators at each participating school, who are responsible for providing the statistical data each year. The five administrators include: head, business manager, director of admission, director of development, and director of financial aid.