GILBERT PUBLIC SCHOOLS
DEMOGRAPHIC & ENROLLMENT ANALYSIS
2020/21

Draft Report

June 15, 2021

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Executive Summary

The 2020/21 demographic and enrollment update for the Gilbert Unified School District (District) incorporates new data for the District and its sub-areas, as well as information regarding changes in regional socioeconomic conditions. The purpose of this analysis is to identify current and historic demographic, development and enrollment trends, and to anticipate future trends to create District and sub-District enrollment projections through 2030/31.

Some of the main findings and conclusions from this report include:

• The Covid-19 pandemic caused a widespread drop in enrollment numbers this school year. Elementary grades, especially Kindergarten, were the most significantly affected; middle schools were only moderately affected, and high schools were the least affected. This sharp decrease in enrollment is expected to correct itself next year as students return to school.

• Total K-12 enrollment in the District was 33,149 students in the fall of the 2020/21 school year, a 4 percent decrease (-1,400 students) from the previous year. This decrease was due entirely to the loss of in-District students, as out-of-District enrollment rose by nearly 300 students. This year was the third year in a row that out-of-District enrollment has increased, rising by over 1,000 students (24 percent) since 2017/18. These gains have helped offset in-District enrollment losses, which have been occurring since 2014/15. Out-of-District enrollment currently accounts for about 17 percent of total enrollment.

• Of the 5,541 out-of-District students that were enrolled in 2020/21, 60 percent came from Mesa Unified School District and the Higley Unified School District. Compared to 2019/20, the number of out-of-District students enrolled in the District increased by 291 students this year due to strong gains in the number of students that were attracted from both the Mesa Unified School District and other districts from which Gilbert does not typically attract students. Gilbert Global Academy attracted 1,055 out-of-District students due to its on-line program, which is double that of the next highest school (Desert Ridge High School). This is an enormous change from last year when Gilbert Global Academy only enrolled 21 out-of-District students. The huge gains in Gilbert Global Academy offset the out-of-District enrollment losses in nearly every other school.

• Between 2000 and 2020, the share of the population under 5 years of age fell from 10 percent of the total population to 6.9 percent, due to the aging of the existing population and the sharp decline in birth rates that accompanied the recession. Persons in the 25 to 44 age group, which is most closely correlated with having young children, constituted about 36 percent of the total population in 2000 but fell to 28 percent in 2020. Meanwhile, the population aged 45 to 64 years has grown significantly, increasing from about 17 percent in 2000 to 25 percent in 2020; this growth fueled the increase in enrollment at the high school level during the same period. Between 2010 and 2020, the population over 44 years grew significantly faster than the overall population, increasing by almost 23 percent.

• There are 13 charter schools operating within the District and another 26 charter schools are located within one mile of District boundaries. Combined, these schools serve nearly 19,200 students. The pandemic caused charters to lose enrollment, but not as much as District schools. Charter schools experienced a 2.6 percent (-500 K-12 students) enrollment decrease, while District schools experienced a 4 percent decrease. Enrollment in grades K-8 comprises the vast majority (81 percent) of the 19,200 charter students in the area; this is down from a share of roughly 85 percent that had persisted for several years. The total number of charter schools located in and nearby the District has generally increased since 2010/11, accompanied by comparable gains in net enrollment, although in 2020/21 enrollment did drop due to the pandemic and two charter schools moved to locations outside of the District. Since 2016/17, area charter enrollment has increased by 34 percent (3,100 students), while in-District charter enrollment increased by 7 percent (450 students) during the same period.

• Construction of single family housing has been very strong, averaging over 700 permits per year between 2015/16 and 2018/19 before surging past 1,000 permits last year. Development has been spread across density levels, although there has been a shift in recent years from lower to higher densities. The potential housing supply in the District is estimated at over 16,000 units. Future development is expected to shift, with single family accounting for less than 40 percent of the potential while multifamily increases to a 60 percent share.

• The difference between the District's resident school-age population and in-District enrollment has been increasing steadily; as a result, the District's "service rate" has declined by 15 percent since 2014/15, dropping to 63.2 percent this year due to the anomalous effects of the COVID-19 pandemic. Assuming a moderate service rate decline throughout the projection period, the District is expected to experience a loss of about 2,600 students (8 percent) by 2030/31, yielding total enrollment of roughly 30,500 K-12 students. Although enrollment is expected to increase next year, it is expected to decline by an average of 1.2 percent per year for the remainder of the projection period.

• Between 2020/21 and 2025/26, 17 of the 26 elementary attendance areas are projected to experience some degree of enrollment decline; however, this decline will be completely offset by gains in the remaining attendance areas, resulting in a net gain of just 7 in-District K-6 students for the period; the largest enrollment gains are projected in the Boulder Creek (+206 students), Finley Farms (+206 students) and Meridian (+188 students) attendance areas and the largest loss is expected in the Greenfield attendance area (-113 students). Combined with a slight increase in out-of-District students, the District is projected to add 57 K-6 students by 2025/26. During the second half of the projection period, 16 of the 26 elementary attendance areas are expected to decline, although gains in the Boulder Creek attendance area (+361 students) offset most of the losses, resulting in a net loss of just 6 in-District students between 2025/26 and 2030/31. Out-of-District enrollment is also projected to decrease by roughly 50 students during this period, resulting in a total enrollment decrease of 55 K-6 students by 2030/31. As a result, total elementary enrollment in 2030/31 is expected to be nearly identical to 2020/21 enrollment (15,564 K-6 students versus 15,507 K-6 students in 2020/21); however, compared to 2019/20 the District will enroll 1,000 fewer elementary students by the end of the projection period.

• In-District 7-8 attendance area enrollment is expected to decline by about 760 students over the next ten years; the majority of these losses (72 percent) are expected to occur during the second five-year period and are almost entirely the result of significant declines in in-District enrollment. The largest enrollment decline over the 10-year period is expected in the Highland attendance area (-307 students); in addition, the Mesquite and South Valley attendance areas are projected to lose nearly 200 students each by 2030/31. Out-of-District enrollment is expected to decline slightly in both periods, resulting in a net loss of about 80 out-of-District students over the next 10 years. As a result, total 7-8 enrollment is projected to decrease by about 840 students (15 percent) by the end of the projection period; compared to 2019/20, 7-8 enrollment will decrease by 1,100 students (19 percent) by 2030/3.

• Significant enrollment declines are projected for the 10-year period at the high school level, particularly in the second half of the period, due to the loss of in-District students. Following moderate 9-12 enrollment increases for the next two years, losses of in-District students are expected to accelerate throughout the remainder the projection period in all of the high school attendance areas, resulting in a net loss of 1,770 in-District 9-12 students over the 10-year period. Combined with a nominal decrease in out-of-District enrollment (-30 students), total high school enrollment is projected to decrease by 1,800 students (15 percent) by 2030/31. The largest enrollment declines are projected in the Highland (-527 students) and Gilbert (-471 students) attendance areas; the Campo Verde and Mesquite high school attendance areas are expected to lose more than 300 9-12 students each.

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1.0 Introduction

The Demographic and Enrollment Analysis for the Gilbert Unified School District (District) incorporates information on enrollment, demographic trends, housing occupancy rates, household characteristics and residential development into 10-year District-level and small-area projections of enrollment by grade. The District-level projections use long-term demographic and housing trends for the District and projected trends for the region in a macroeconomic, top-down analysis of enrollment.

In addition to the District-wide enrollment forecasts, projections are developed for small-area planning geographies (grids) that are generally one-quarter of a square mile, as shown on **Map 1**. The District is divided into 224 grids that can be combined to represent current school attendance areas and provide sufficient detail to support future facility and attendance area planning activities. Small-area enrollment projections are developed by combining the location by grid of current students in the District with the expected number of housing additions, and the students generated from that new housing.

The balance of this report is separated into four sections: Existing Conditions, Residential Development, District Projections, and Sub-District Projections. Section 2, Existing Conditions, provides a historical context for interpreting the current District enrollment levels and a detailed review of student distribution by grade and geography.

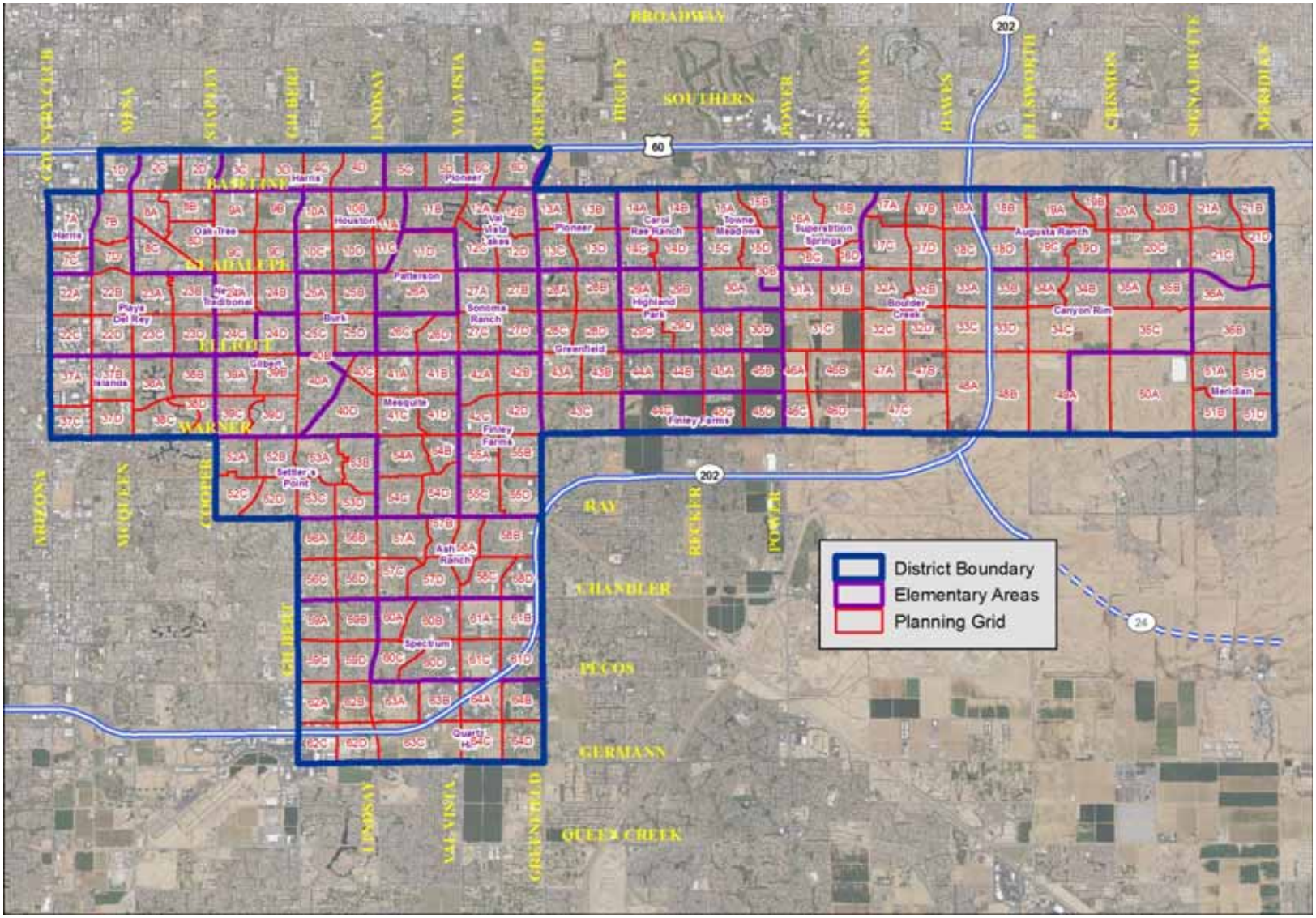
Section 3, Residential Development, presents information on current construction activity, vacancy rates and the potential future supply of new housing by unit type. It provides estimates for the timing of construction based on current activity, ownership and zoning status for vacant land available for residential development and area growth forecasts.

District Projections are provided in Section 4. These enrollment projections are created by combining the expected residential housing additions with the existing District population, accounting for regional and local trends in socioeconomic conditions and forecasts.

Section 5, Sub-District Projections, describes the anticipated change in enrollment within the District based on many factors, including additions to housing inventory, occupancy rates and population per household trends. These projections are created by combining the grid location of current students in the District with the expected number of housing additions, the school-age persons generated from them, and the likely share of those persons that will attend a District school. The small-area projections are aggregated by current attendance area in order to provide baseline projections, but they can also be summed to examine alternative attendance areas. These projections are then adjusted to predict enrollment by school based on the current relationship between where students live and where they attend school.

The information and observations contained in this report are based on our present knowledge of the land use and development patterns of the area under analysis, the current physical and socioeconomic conditions of the affected areas, and regional forecasts. Estimates and projections made in this report are based on hypothetical assumptions. However, even if the assumptions outlined in this report occur, there will usually be differences between the estimates and projections and the actual results because events and circumstances frequently do not occur precisely as expected. Applied Economics is under no obligation to update this report for events occurring after the date of its release.

MAP 1
DISTRICT GRID PLANNING GEOGRAPHY



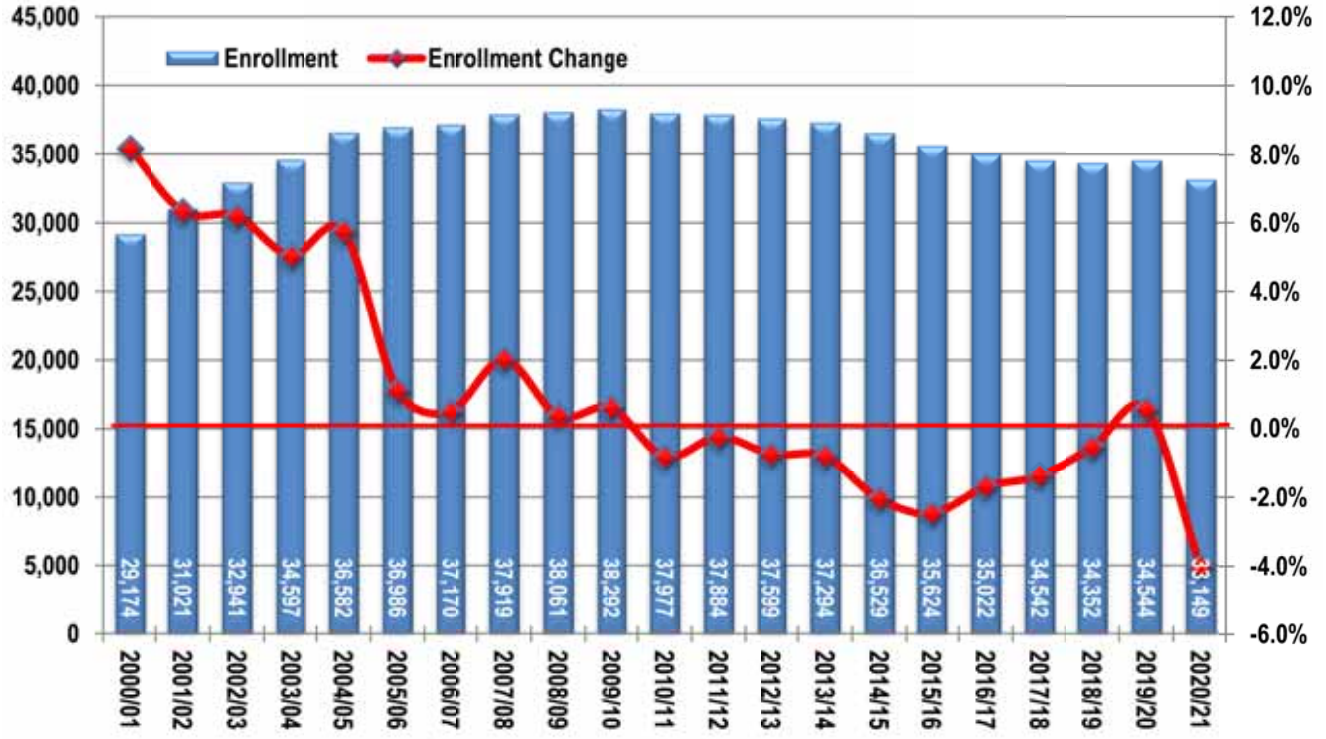
2.0 Existing Conditions

2.1 Enrollment

Total Kindergarten through 12th grade (K-12) enrollment in the District was 33,149 students in the fall of the 2020/21 school year, representing a four percent decrease (roughly 1,400 students) from 2019/20 enrollment. This sharp decline is due to the anomalous effects of the Covid-19 pandemic and many area districts experienced significantly larger declines. In the previous school year, the District saw its first rise in enrollment since 2009/10, which was fueled by a rise in housing construction.

As illustrated by **Figure 1**, the District experienced substantial growth in the early 2000's, with an average increase of around 1,900 students per year between 2000/01 and 2004/05. Over the following five years growth slowed considerably, but enrollment continued to increase by a few hundred students per year. From 2010/11 through 2018/19, K-12 enrollment declined by an average of 400 students every year; despite the fact that roughly 8,600 new housing units were added, the total enrollment loss for the nine-year period was nearly 4,000 students. This decline was partly due to the aging of the District's population, but was fueled by the strong increase in charter school enrollment in and around the District.

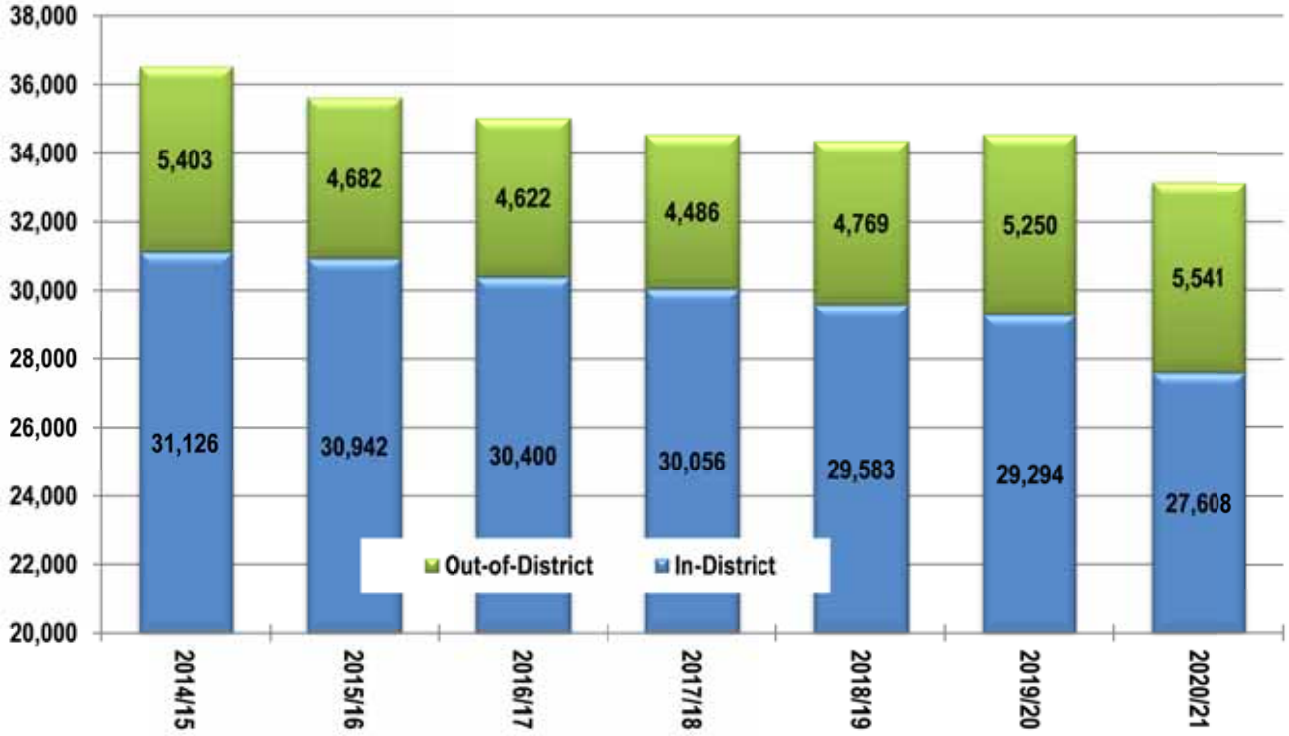
FIGURE 1
HISTORIC ENROLLMENT



Source: Arizona Department of Education; Gilbert Unified School District.

As illustrated in **Figure 2**, in-District enrollment dropped by nearly six percent (1,700 students) in the 2020/21 school year, a sharp decline that was driven by the anomalous effects of the pandemic. This COVID-related drop exacerbated the trend of declining in-District enrollment, which decreased by nearly six percent (1,800 students or 360 per year) between 2014/15 and 2019/20. Out-of-District enrollment has been growing since 2017/18, and the slight rise in total enrollment in the 2019/20 school year was due to entirely to an increase of nearly 500 out-of-District students. The increase in out-of-District enrollment in the 2020/21 school year (290 students) helped offset the in-District losses resulting from the pandemic.

FIGURE 2
SOURCE OF DISTRICT ENROLLMENT



Sources: Gilbert Unified School District; Applied Economics.

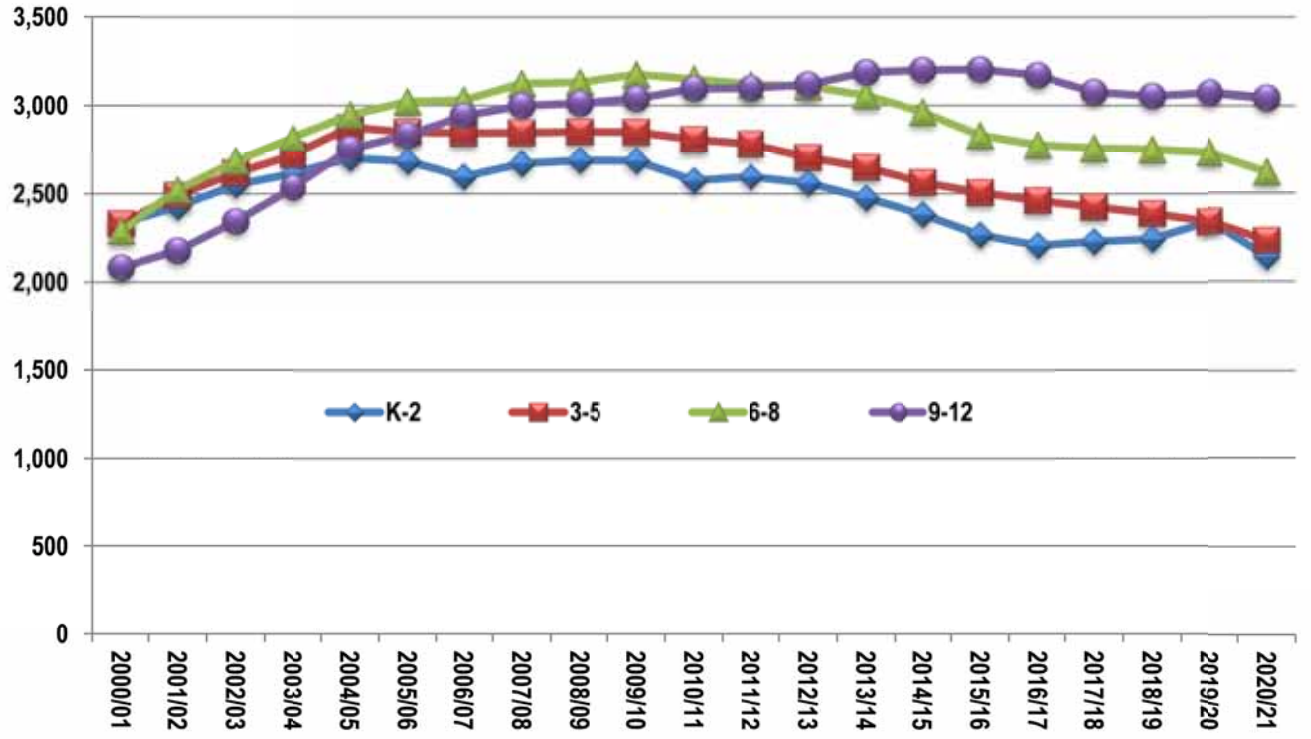
The breakdown of enrollment by grade cohort provides a good understanding of past and current enrollment characteristics and lends insight into structural trends that will continue to shape enrollment in the coming years. For this purpose, the grades are grouped into the following cohorts: Kindergarten through 2nd grade (K-2), 3rd through 5th grade (3-5), 6th through 8th grade (6-8) and 9th through 12th grade (9-12). By showing the average enrollment per grade in **Figure 3**, the differences between the three- and four-grade groupings are normalized.

Enrollment in each cohort was relatively equal at the beginning of the study period, with the exception of the 9-12 cohort which contained about 260 fewer students per grade level than the other three cohorts. Beginning in 2003/04, growth in the K-2 and 3-5 cohorts began to level off, while the size of the 6-8 and 9-12 cohorts continued to increase due to the aging of the younger families that had moved into the District in the 1990s and early 2000s.

As the influx of young families slowed and the resident population continued to age, District enrollment growth slowed and each grade cohort reacted to the changes in the preceding cohort. By 2010/11, per grade enrollment in all of the primary (K-8) cohorts was in decline. In 2016/17 the effect reached the 9-12 cohort, causing average enrollment in the cohort to decline for several years. In 2019/20, per grade 9-12 enrollment increased slightly (0.6 percent) for the first time since 2015/16. The K-2 cohort was the only other cohort to gain enrollment in recent years, increasing by about 140 students per grade between 2016/17 and 2019/20.

This year, however, the pandemic caused enrollment in all of the cohorts to drop. The decline in the K-2 cohort was the most severe, dropping by about 200 students per grade, while the 3-5 and 6-8 cohorts experienced moderate declines dropping an average of 110 students per grade. The 9-12 cohort experienced the least decline, losing about 30 students per grade. This trend was similar across the nation during the pandemic as parents chose not to start Kindergarteners and to pull their younger children out of school entirely, while high school students tended to remain in school. This effect was especially pronounced in Arizona and other states where enrolling in kindergarten is optional.

FIGURE 3
AVERAGE ENROLLMENT BY GRADE BY COHORT



Source: Arizona Department of Education; Gilbert Unified School District; Applied Economics.

In addition to the distribution of enrollment by grade cohort, the geographic distribution of enrollment provides valuable insight into other conditions and trends impacting the District. **Map 2** shows the current location of students attending District schools, including those living in the immediately surrounding area. This map illustrates the impact of open enrollment policies, as the District continues to attract numerous students from a large number of areas outside its boundaries.

MAP 2
GEOGRAPHIC DISTRIBUTION OF STUDENTS: 2020/21

Table 1 shows the source of out-of-District enrollment by grade for the current school year. In all, the 5,541 out-of-District students that were enrolled in 2020/21 came from more than 15 metro area school districts. However, 60 percent of the out-of-District students came from Mesa Unified School District (39 percent or more than 2,100 K-12 students) and Higley Unified School District (21 percent or over 1,100 K-12 students).

Compared to 2019/20, the number of out-of-District students enrolled in the District increased by 291 students this year. This increase was largely due to strong gains in the number of students that were attracted from Mesa Unified School District (143 students or seven percent) and 'Other' school districts, which increased by 240 percent (75 students). Typically, Kindergarten, 7th grade, and 9th grade experience the largest growth of out-of-District enrollment, since these are the grades when students are most likely to transition. This year, however, the pandemic caused atypical growth distributions. Kindergarten was the only grade to shrink (down just one student compared to 2019/20), 7th and 9th grade out-of-District enrollment grew very little, while the 1st, 3rd, 8th, and 10th grades grew by the largest margins (more than 40 students each).

TABLE 1
SOURCE OF OUT-OF-DISTRICT ENROLLMENT BY GRADE: 2020/21

	Enrollment by Grade														2019/20	
District	KG	1	2	3	4	5	6	7	8	9	10	11	12	Total	Total	Change
Mesa Unified District	186	161	184	131	149	123	118	170	166	194	195	208	179	2,164	2,021	143
Higley Unified District	82	75	67	75	76	84	90	83	85	100	127	101	122	1,167	1,142	25
Chandler Unified District	42	74	51	60	43	43	56	55	54	97	90	92	113	870	830	40
Queen Creek Unified District	30	32	30	46	24	34	33	32	42	53	55	81	106	598	574	24
Apache Junction Unified District	15	18	19	20	15	19	13	18	35	29	31	35	29	296	291	5
Florence Unified School District	9	9	6	11	7	4	7	10	6	6	5	10	24	114	127	-13
J. O. Combs Unified School Distric	12	15	6	11	10	7	12	9	10	3	7	11	12	125	104	21
Kyrene Elementary District	4	3	0	3	3	3	1	3	4	3	4	2	6	39	55	-16
Tempe School District	4	2	2	2	5	0	0	1	2	3	0	1	3	25	27	-2
Phoenix Elementary District	0	1	0	0	0	2	0	0	0	1	1	1	1	7	13	-6
Roosevelt Elementary District	1	1	1	1	0	1	0	0	1	1	0	0	0	7	9	-2
Maricopa Unified School District	0	0	1	0	0	0	1	0	0	0	0	0	3	5	8	-3
Paradise Valley Unified District	0	0	0	0	0	0	1	0	1	0	0	0	0	2	6	-4
Scottsdale Unified District	0	2	0	2	0	1	2	0	0	2	2	2	1	14	6	8
Washington Elementary District	0	0	0	1	0	1	0	0	0	0	0	0	0	2	6	-4
Other	8	6	4	9	7	5	13	5	10	12	13	4	10	106	31	75
Total	393	399	371	372	339	327	347	386	416	504	530	548	609	5,541	5,250	291

Sources: Gilbert Public Schools, 2020; Applied Economics, 2021.
* Current grade compared to prior grade last year except for Kindergarten and 9th grade which are the same grade.

Table 2 shows where out-of-District students enrolled in 2020/21, and clearly illustrates the fact that out-of-District enrollment is largest in the District's high schools. With 1,055 students, Gilbert Global Academy had the largest out-of-District enrollment this year, increasing an astonishing 4,900 percent from just 21 students last year; this increase can be attributed to the school's online mode, which was an attractive option during the pandemic. The huge spike in enrollment at Gilbert Global Academy offset moderate declines at almost every other school. Prior to this year, Desert Ridge High School had the largest out-of-District enrollment and it had the second largest total this year, although it lost 86 students compared to 2019/20; the losses this year were concentrated in grades 10-11, as the school gained 20 out-of-District students in the 9th grade.

Of all the high schools, Campo Verde saw the least decline, only losing 18 (5 percent) out-of-District students. It now has the 4th largest out-of-District enrollment (338 students), followed by Highland High School (385 students). Although Desert Ridge saw the greatest decline in overall students, Mesquite High School saw the largest percentage drop, losing 19 percent (53 students) of its out-of-District students. Canyon Valley remains the high school with the fewest number of out-of-District students (31 students), not counting Gilbert Classical Academy.

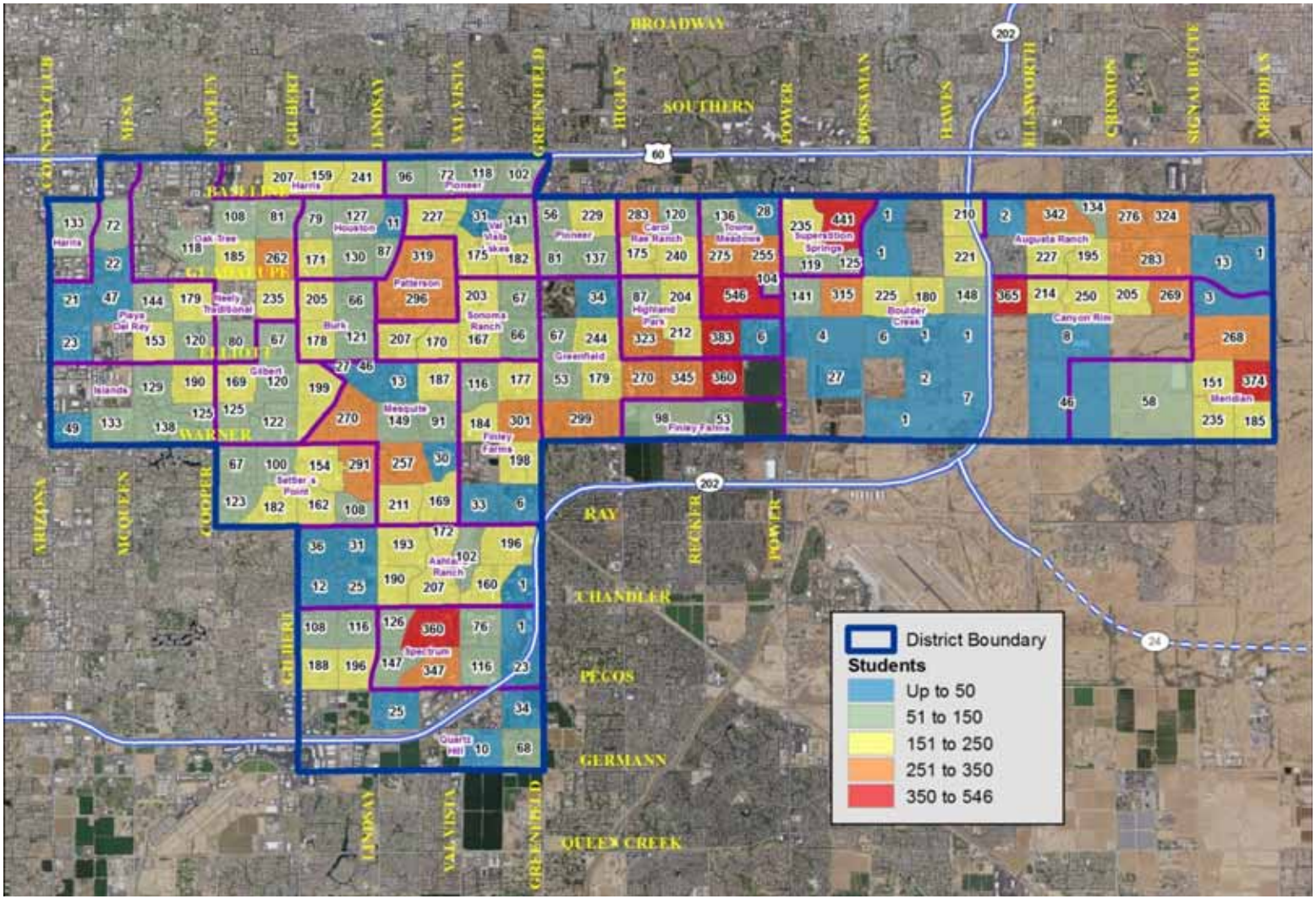
TABLE 2
DESTINATION OF OUT-OF-DISTRICT ENROLLMENT BY GRADE: 2020/21

	KG	1	2	3	4	5	6	7	8	9	10	11	12	Total	2019/20 Total	Change
Ashland Ranch Elementary	10	14	11	9	10	6	11							71	94	-23
Augusta Ranch Elementary	21	18	15	16	12	14	14							110	163	-53
Boulder Creek Elementary	5	3	9	8	4	7	7							43	56	-13
Burk Elementary	10	3	4	8	9	5	4							43	46	-3
Campo Verde High School										83	86	72	97	338	356	-18
Canyon Rim Elementary	20	11	18	10	11	14	13							97	93	4
Carol Rae Ranch Elementary	15	2	7	10	7	4	6							51	58	-7
Desert Ridge High School										116	93	155	150	514	600	-86
Desert Ridge Junior High School								82	88					170	208	-38
Finley Farms Elementary	7	8	7	11	15	12	9							69	94	-25
Gilbert Elementary	13	11	17	13	12	9	7							82	124	-42
Gilbert High School										58	82	70	65	275	312	-37
Greenfield Elementary	10	13	8	12	8	8	10							69	80	-11
Greenfield Junior High School								53	47					100	103	-3
Harris Elementary	14	19	16	10	13	7	9							88	102	-14
Highland High School										79	111	90	105	385	428	-43
Highland Junior High School								44	60					104	128	-24
Highland Park Elementary	14	16	16	13	16	16	13							104	107	-3
Houston Elementary	6	6	8	8	4	4	8							44	65	-21
Islands Elementary	17	24	15	14	17	12	17							116	113	3
Meridian Elementary	15	13	5	17	9	10	14							83	100	-17
Mesquite High School										59	50	57	56	222	275	-53
Mesquite Junior High School								35	38					73	112	-39
Oak Tree Elementary	8	7	8	7	6	7	6							49	76	-27
Patterson Elementary	14	5	11	8	8	11	14							71	82	-11
Pioneer Elementary	9	14	18	10	9	13	3							76	84	-8
Playa del Rey Elementary	4	10	11	5	7	11	3							51	58	-7
Quartz Hill Elementary	27	24	18	29	22	25	21							166	217	-51
Settler's Point Elementary	8	12	6	7	4	11	3							51	38	13
Sonoma Ranch Elementary	7	8	3	8	5	5	4							40	42	-2
South Valley Junior High School								51	57					108	128	-20
Spectrum Elementary	10	9	8	10	10	7	11							65	84	-19
Superstition Springs Elementary	15	12	9	15	12	10	9							82	105	-23
Towne Meadows Elementary	15	18	18	14	21	14	11							111	105	6
Val Vista Lakes Elementary	7	4	13	8	11	10	6							59	63	-4
Neely Traditional Academy	18	15	10	11	11	10	13							88	101	-13
Gilbert Classical Academy								27	17	26	19	19	19	127	161	-34
Gilbert Global Academy	66	94	75	77	58	60	90	91	103	81	87	77	96	1,055	21	1,034
Canyon Valley High School										2	2	7	20	31	2	29
The Aces- Gilbert						1								1	0	1
Mesquite Elementary	8	6	7	4	8	4	11	3	3					54	65	-11
Other	0	0	0	0	0	0	0	0	3	0	0	1	1	5	1	4
Total	393	399	371	372	339	327	347	386	416	504	530	548	609	5,541	5,250	291

Sources: Gilbert Public Schools, 2020; Applied Economics, 2021.

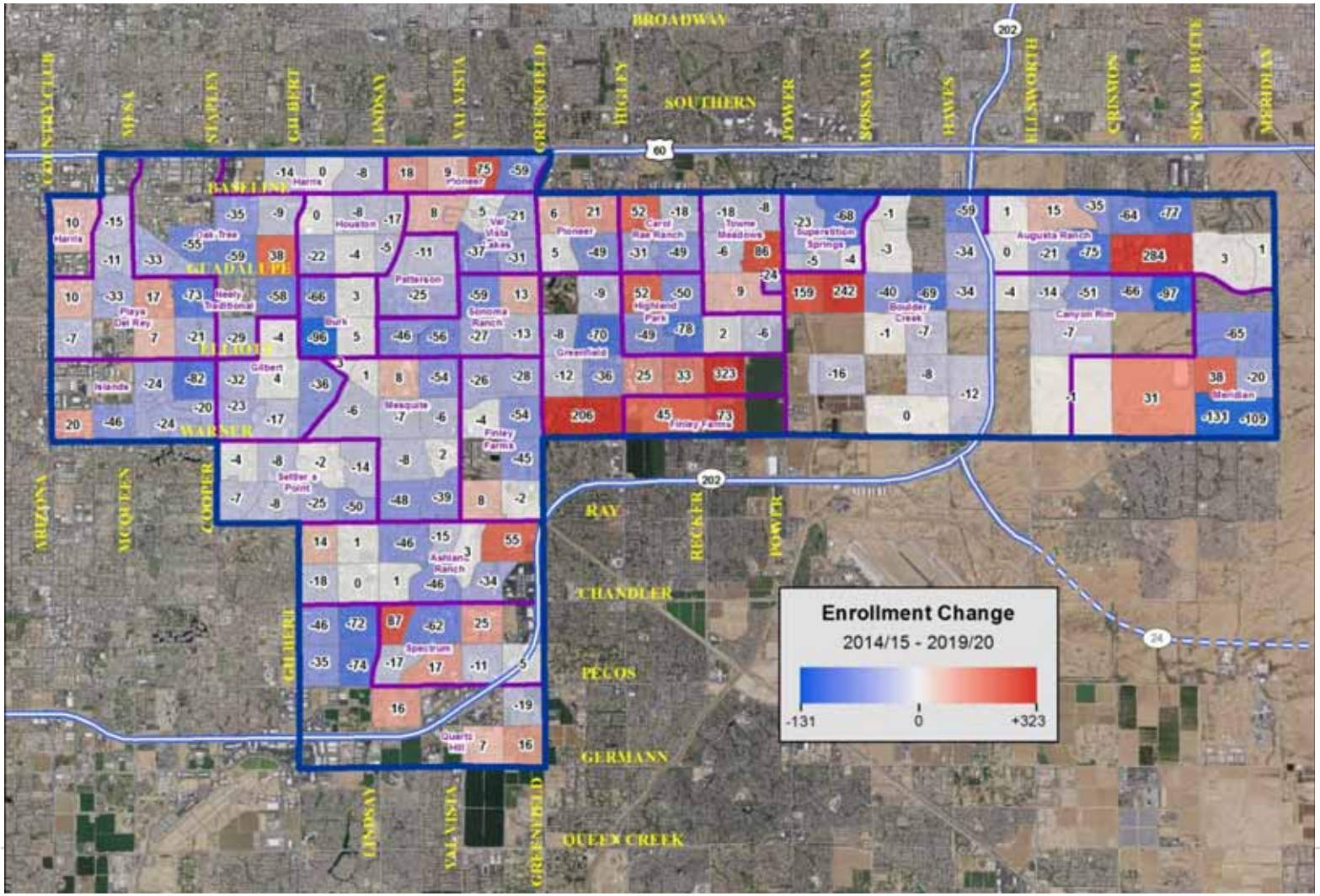
Map 3 normalizes the distribution of the student point data for in-District students, showing the number of K-12 District students coming from each grid. This map shows that enrollment is widely dispersed, with several pockets of higher student concentrations, generally in areas with newer housing developments.

MAP 3
ENROLLMENT DENSITY: 2020/21



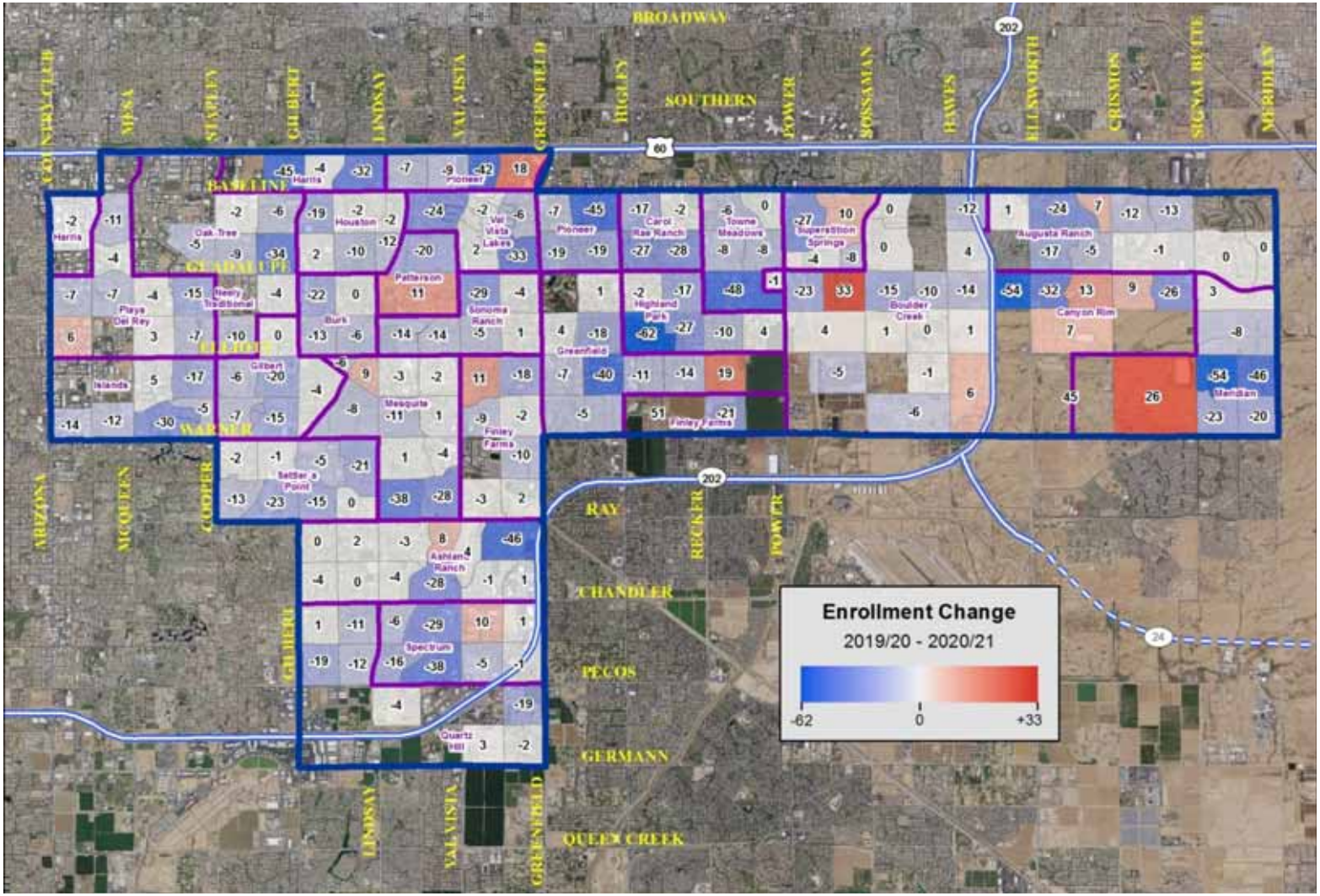
Both the point location and grid-level data are useful in examining changes in enrollment over time. **Map 4** shows the change in enrollment by planning grid between 2014/15 and 2019/20, during which time aggregate K-12 losses totaled almost 2,000 students. It excludes the 2020/21 year, because the data is so inconsistent with past trends and expected near-term enrollment levels. While areas of decline are widespread, pockets of enrollment growth, driven by new home construction, are concentrated in the central portion of the District, generally between Greenfield and Sossaman Roads.

MAP 4
CHANGE IN ENROLLMENT: 2014/15 - 2019/20



Map 5 shows the change in enrollment by planning grid over just the past year. It clearly illustrates the ubiquity of the pandemic-induced enrollment decline across the District; there are only a small number of grids, mostly those with significant development, that show modest gains.

MAP 5
CHANGE IN ENROLLMENT: 2019/20 - 2020/21



2.2 Demographic Trends

Table 3 contains Census data on population and housing in the District for 2000 and 2010, along with estimates for 2020 based on demographic and housing trends and ACS data. Changes in population, age distribution, ethnic composition and housing characteristics can help explain recent enrollment trends, as well as changes in the character of the area. The compound annual rate of change is provided to allow for comparison between the two periods.

Between 1990 and 2000, the total population in the District increased by over 200 percent, from about 43,000 to 135,000 persons. While that enormous rate of increase was not sustained, the population grew another 36 percent between 2000 and 2010, with the bulk of the increase occurring during the first half of the decade. Total population in 2020 was about 206,500, 12 percent higher than the 2010 Census figure; this equates to an annual growth rate of just 1.1 percent, down from 3.2 percent per year between 2000 and 2010.

Between 2000 and 2020, as the large number of young families that arrived in the District during the 1990s aged in place, the share of the population under 5 years of age fell from 10 percent of the total population to 6.9 percent. Along with the aging of the existing population, this drop is indicative of the sharp decline in birth rates that accompanied the recession. The share of the population between 5 and 17 years of age has remained relatively unchanged, falling from about 23 percent in 2000 and 2010 to 21 percent in 2020. Those in the 25 to 44 age group, which is typically most closely correlated with having young children, constituted about 36 percent of the total population in 2000 but fell to 28 percent in 2020. Meanwhile, the population aged 45 to 64 years has grown significantly, increasing from about 17 percent in 2000 to 25 percent in 2020; this growth fueled the increase in enrollment at the high school level during the same period. Between 2010 and 2020, the population over 44 years grew significantly faster than the overall population, increasing by nearly 13,400 persons, or almost 23 percent.

Housing occupancy has increased slightly since 2000, rising from roughly 93 percent to almost 94 percent in 2020. However, the percentage of owner-occupied housing has fallen from 78 percent in 2000 to about 66 percent in 2020. This can be attributed to the consequences of the housing market collapse, when many people lost homes to foreclosure and a large number of previously owner-occupied properties became rental units. The downward trend in ownership is widespread and not specific to the District. While multifamily housing only accounts for 19 percent of the housing supply currently, the roughly 3,500 units added between 2010 and 2020 account for 37 percent of the total increase in housing supply during that period.

There is a strong correlation between householder age and the presence of children in a household. Between 2010 and 2020, the share of householders under the age of 45 dropped from 46 percent to 43 percent; this is another sign of an aging population that can result in fewer young children and an increase in older children. Another emblematic consequence of an aging population is a decline in the population per household. In 2000 there were 3.03 persons per household on average in the District, a reflection of the young families that had moved into new subdivisions at the edge of the metropolitan region. By 2020 the population per household fell to 2.80 persons as the District matured and new, entry-level housing became more limited in the District.

TABLE 3
DEMOGRAPHIC TRENDS

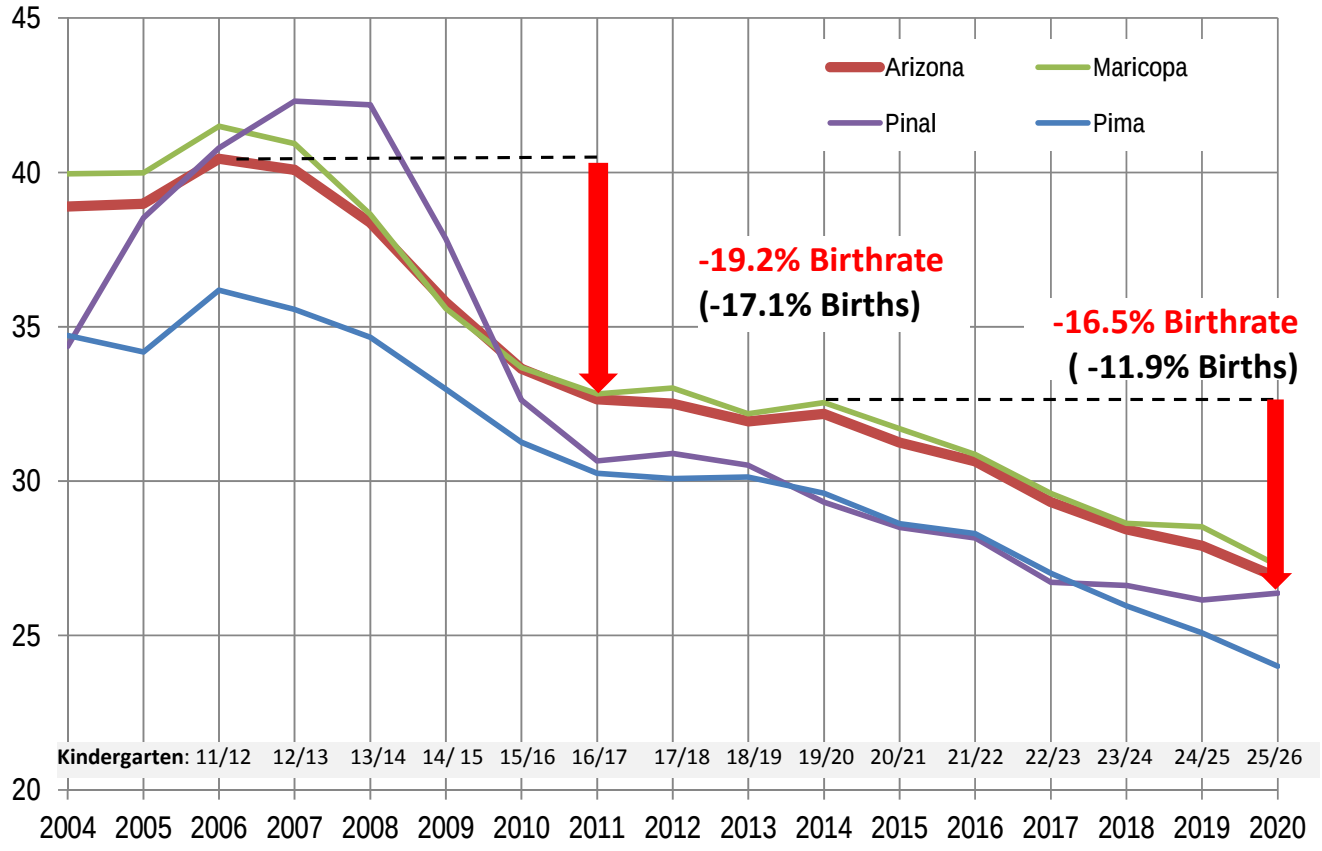
	2000 Census		2010 Census		2020 Estimate		Change (2000-2010)		Change (2010-2020)	
	Total	Percent	Total	Percent	Total	Percent	Total	Change*	Total	Change*
Population										
Total	135,012	100.0%	184,433	100.0%	206,490	100.0%	49,421	3.2%	22,057	1.1%
By Race & Ethnicity:										
White	110,510	81.9%	139,303	75.5%	151,985	73.6%	28,793	2.3%	12,682	0.9%
African American	3,088	2.3%	5,658	3.1%	5,701	2.8%	2,570	6.2%	43	0.1%
Native American	742	0.5%	1,395	0.8%	1,874	0.9%	653	6.5%	479	3.0%
Asian	4,407	3.3%	8,968	4.9%	11,045	5.3%	4,561	7.4%	2,077	2.1%
Hispanic	16,130	11.9%	28,901	15.7%	35,593	17.2%	12,771	6.0%	6,692	2.1%
Other	135	0.1%	208	0.1%	291	0.1%	73	4.4%	83	3.4%
By Age:										
Age 0-4	13,461	10.0%	13,565	7.4%	14,276	6.9%	104	0.1%	711	0.5%
Age 5-13	22,786	16.9%	29,113	15.8%	30,085	14.6%	6,327	2.5%	972	0.3%
Age 14-17	8,459	6.3%	13,137	7.1%	13,973	6.8%	4,678	4.5%	836	0.6%
Age 18-24	10,396	7.7%	15,827	8.6%	16,745	8.1%	5,431	4.3%	918	0.6%
Age 25-44	49,087	36.4%	53,569	29.0%	57,576	27.9%	4,482	0.9%	4,007	0.7%
Age 45-64	22,651	16.8%	43,255	23.5%	51,818	25.1%	20,604	6.7%	8,563	1.8%
Age 65 Up	8,172	6.1%	15,967	8.7%	22,017	10.7%	7,795	6.9%	6,050	3.3%
Housing Units										
Total	47,996	100.0%	69,306	100.0%	80,405	100.0%	21,310	3.7%	11,099	1.5%
Occupied	44,552	92.8%	63,380	91.4%	75,458	93.8%	18,828	3.6%	12,078	1.8%
Owner	37,477	78.1%	46,553	67.2%	52,928	65.8%	9,076	2.2%	6,375	1.3%
Renter	7,075	14.7%	16,827	24.3%	22,529	28.0%	9,752	9.1%	5,702	3.0%
Vacant	3,444	7.2%	5,926	8.6%	4,947	6.2%	2,482	5.6%	-979	-1.8%
By Unit Type:										
Single Family	40,571	84.5%	57,843	83.5%	64,544	80.3%	17,272	3.6%	6,701	1.1%
Multifamily	7,425	15.5%	11,463	16.5%	15,861	19.7%	4,038	4.4%	4,398	3.3%
Households										
Total	44,552	100.0%	63,380	100.0%	73,767	100.0%	18,828	3.6%	10,387	1.5%
By Age of Householder:										
15 to 24	1,924	4.3%	2,404	3.8%	2,098	2.8%	480	2.3%	-306	-1.4%
25 to 34	11,436	25.7%	11,212	17.7%	12,462	16.9%	-224	-0.2%	1,250	1.1%
35 to 44	13,716	30.8%	15,740	24.8%	17,129	23.2%	2,024	1.4%	1,389	0.8%
45 to 54	8,610	19.3%	15,058	23.8%	16,562	22.5%	6,448	5.7%	1,504	1.0%
55 to 64	4,261	9.6%	9,503	15.0%	12,498	16.9%	5,242	8.4%	2,995	2.8%
65 to 74	2,865	6.4%	5,541	8.7%	8,061	10.9%	2,676	6.8%	2,520	3.8%
Over 75	1,740	3.9%	3,922	6.2%	4,956	6.7%	2,182	8.5%	1,034	2.4%
Population Per	3.03		2.91		2.80		-0.12	-0.4%	-0.11	-0.4%

Sources:
U.S. Bureau of the Census, 2000 and 2010; American Community Survey, 2019; Applied Economics, 2021.
* Annual compound rate of change.

Another major factor affecting enrollment in schools is the recent decline in the birth rate, both regionally and nationally. As shown in **Figure 4**, the birthrate (births per 1,000 for the population aged 15 to 45) in Arizona declined by 19.2 percent between 2006 and 2011 due to the recession. Between 2011 and 2014 the rate was fairly stable, but since then the rate has been declining again falling by another 16.5 percent in six years, which brings the total compound rate reduction to 33 percent since 2006.

Despite the continued decline in the birth rate, the total number of births has declined less since 2014 because the population aged 15 to 45 has been increasing. The impact of the declining birth rate on Kindergarten enrollment is delayed five years. As such, the statewide birthrate decline between 2006 and 2011 impacted kindergarten enrollment between 2012/13 and 2016/17. The latest drop in the birthrate will likely have a significant impact on the size of incoming kindergarten classes through at least 2025/26, declining by as much as 11.85 percent statewide. Between this factor and the push by charter schools to attract Kindergarteners, nearly all school Districts in the Phoenix Metropolitan Area have experienced recent declines in Kindergarten enrollment and they will likely continue to see reduced class sizes for several more years.

FIGURE 4
BIRTHRATES IN ARIZONA AND SELECTED COUNTIES: 2004 – 2020



Sources: Arizona Department of Health Services; Applied Economics, 2020.

2.3 Alternative Providers

Public school districts face increasing competition for students due to an expanding number of charter and private schools, as well as neighboring public school districts through open enrollment. Given that newly-opened schools can have an immediate impact on District enrollment, it is important that enrollment data for these alternative providers is as up-to-date as possible in order to fully assess their impact on the District.

The COVID-19 pandemic caused charter school enrollment to drop in 2020/21, although the total local charter school enrollment decline was smaller than that experienced by the District (2.6 percent versus the District's enrollment loss of about 4.0 percent). There are currently 13 charter schools serving K-12 students within the District, and an additional 26 charter schools operating within one mile of District boundaries. Combined, these schools serve nearly 19,200 students, as listed on **Table 4**. The largest of the charters in the District is Eduprize Schools Gilbert; with enrollment of nearly 1,700 students, it is roughly twice the size of any other in-District charter school; in addition, two in-District schools serve more than 700 students each (Noah Webster-Mesa and Legacy Traditional-East Mesa). Legacy Traditional-East Mesa opened in 2018/19; after adding 160 students this year, the school now enrolls more than 1,000 Kindergarten to 8th grade (K-8) students. Imagine West moved both its Gilbert Elementary and Gilbert Middle schools, which enrolled roughly 240 K-8 students in 2019/20, to new locations outside of the District this year.

The largest school located within one mile of the District's boundaries is American Leadership Academy-Gilbert North, which opened in the fall of the 2017-18 school year; this campus, located on Higley Road, is home to two schools that enrolled a total of roughly 2,600 K-12 students at the beginning of the 2020/21 school year, which reflects an increase of 200 students over 2019/20. In addition, four other nearby charter schools enroll 700 or more students each.

Enrollment in grades K-8 comprises the vast majority (81 percent) of the 19,200 charter students in the area; this is down from a share of roughly 85 percent that had persisted for several years prior to 2018/19. Since 2016/17, local charter schools have increased their 9-12 enrollment by nearly 1,500 students; as a result, 9-12 enrollment now accounts for roughly 19 percent of total charter enrollment, up from roughly 14 percent in 2016/17. Charter enrollment growth has compounded the issue of aging-in-place that is occurring throughout the District and has contributed to the waning enrollment at both the elementary and high school level.

The locations of non-District schools are shown on **Map 6**, which also depicts the District's elementary attendance areas. As previously mentioned, 26 of the 39 local charter schools are located just outside of the District, but within one mile of its boundaries. Many of these charter schools are located in very close proximity to a boundary road; in theory, these schools are more likely to draw students from neighboring districts than those located further inside the District, but this is not a certainty. The data suggests that there is a complex flow of students in the area, both incoming and outgoing, between District, neighboring public districts, charter schools and private schools.

TABLE 4
ENROLLMENT IN LOCAL CHARTER SCHOOLS

School Name	Address	City	Zip	Grades Offered	Total K-12
In-District Charter Schools					
Benjamin Franklin Charter School - Gilbert	13641 S. Val Vista Drive	Gilbert	85296	K-6	513
Challenger Basic School	1315 N. Greenfield Road	Gilbert	85234	K-6	337
Desert Hills High School	1515 S. Val Vista Drive	Gilbert	85296	9-12	207
Eduprize Schools Gilbert	580 W. Melody Avenue	Gilbert	85233	K-12	1,664
Gilbert Arts Academy	862 E. Elliot Road	Gilbert	85234	K-8	179
Great Hearts Academies - Archway Arete	4525 E. Baseline Road	Gilbert	85234	K-5	541
Great Hearts Academies - Arete Prep	4525 E. Baseline Road	Gilbert	85234	6-12	556
Liberty Arts Academy	3015 S. Power Road	Mesa	85212	K-8	311
Noah Webster Schools - Mesa	7301 E. Baseline Road	Mesa	85209	K-6	744
San Tan Charter School - Recker Campus	3959 E. Elliot Road	Gilbert	85234	K-6	464
San Tan Charter School - Power Campus	3232 Power Road	Gilbert	85234	7-12	381
Legacy Traditional School - East Mesa	10707 E. Guadalupe Road	Mesa	85209	K-8	1,013
Leman Academy of Excellence-East Mesa	3761 S. Power Road	Mesa	85212	K-8	169
In-District Total					7,079
Area Charter Schools*					
American Leadership Academy - Gilbert K-6	3155 S. Santan Village Parkway	Gilbert	85295	K-6	669
American Leadership Academy - Gilbert North K-6	1010 S. Higley Road	Gilbert	85296	K-6	863
American Leadership Academy - Gilbert North 7-12	1070 S. Higley Road	Gilbert	85296	7-12	1,761
American Leadership Academy - Mesa K-6	4507 S. Mountain Road	Mesa	85212	K-6	438
AZ Compass Prep School	2020 N. Arizona Avenue	Chandler	85225	7-12	248
BASIS Mesa	5010 S. Eastmark Parkway	Mesa	85212	K-12	814
Burke Basic School	131 E. Southern Avenue	Mesa	85210	K-6	736
El Dorado High School	2200 N. Arizona Avenue	Chandler	85224	9-12	114
Great Hearts Academies - Archway Lincoln	2250 S. Gilbert Road	Chandler	85286	K-5	712
Great Hearts Academies - Lincoln Prep	2250 S. Gilbert Road	Chandler	85286	6-11	570
Imagine East Mesa Elementary	9701 E. Southern Avenue	Mesa	85208	K-6	598
Imagine East Mesa Middle	9701 E. Southern Avenue	Mesa	85208	7-8	129
Intelli-School Chandler	1727 N. Arizona Avenue	Chandler	85225	9-12	85
Leading Edge Academy Gilbert Early College	717 W. Ray Road	Gilbert	85233	7-12	311
Leading Edge Academy Gilbert Elementary	717 W. Ray Road	Gilbert	85233	K-6	250
Learning Foundation and Performing Arts - Gilbert	4055 E. Warner Road	Gilbert	85296	7-12	353
Learning Foundation and Performing Arts - Warner	3939 E. Warner Road	Gilbert	85296	K-6	292
Legacy Traditional School - North Chandler	1900 N. McQueen Road	Chandler	85225	K-8	963
Montessori Education Centre Charter School - Mesa	2834 E. Southern Avenue	Mesa	85204	K-6	249
Pathfinder Academy at Eastmark	4816 S. Eastmark Parkway	Mesa	85212	K-6	287
Sequoia Charter Elementary School	1460 S. Horne Street	Mesa	85204	K-6	399
Sequoia Secondary School	1460 S. Horne Street	Mesa	85204	7-12	391
Sun Valley High School	1143 Lindsay Road	Mesa	85204	9-12	248
Val Vista Academy	4120 S. Val Vista Drive	Gilbert	85297	K-8	371
Vector Prep & Arts Academy	2020 N. Arizona Avenue	Chandler	85225	K-6	216
Self Development Academy - East Mesa	7930 East Baseline Road	Mesa	85209	K-3	28
Area Total					12,095
Grand Total					19,174

Source: Arizona Department of Education; Applied Economics 2021.
* Charter schools located within approximately one mile of the District's boundaries.

MAP 6
GILBERT AREA ALTERNATIVE PROVIDERS

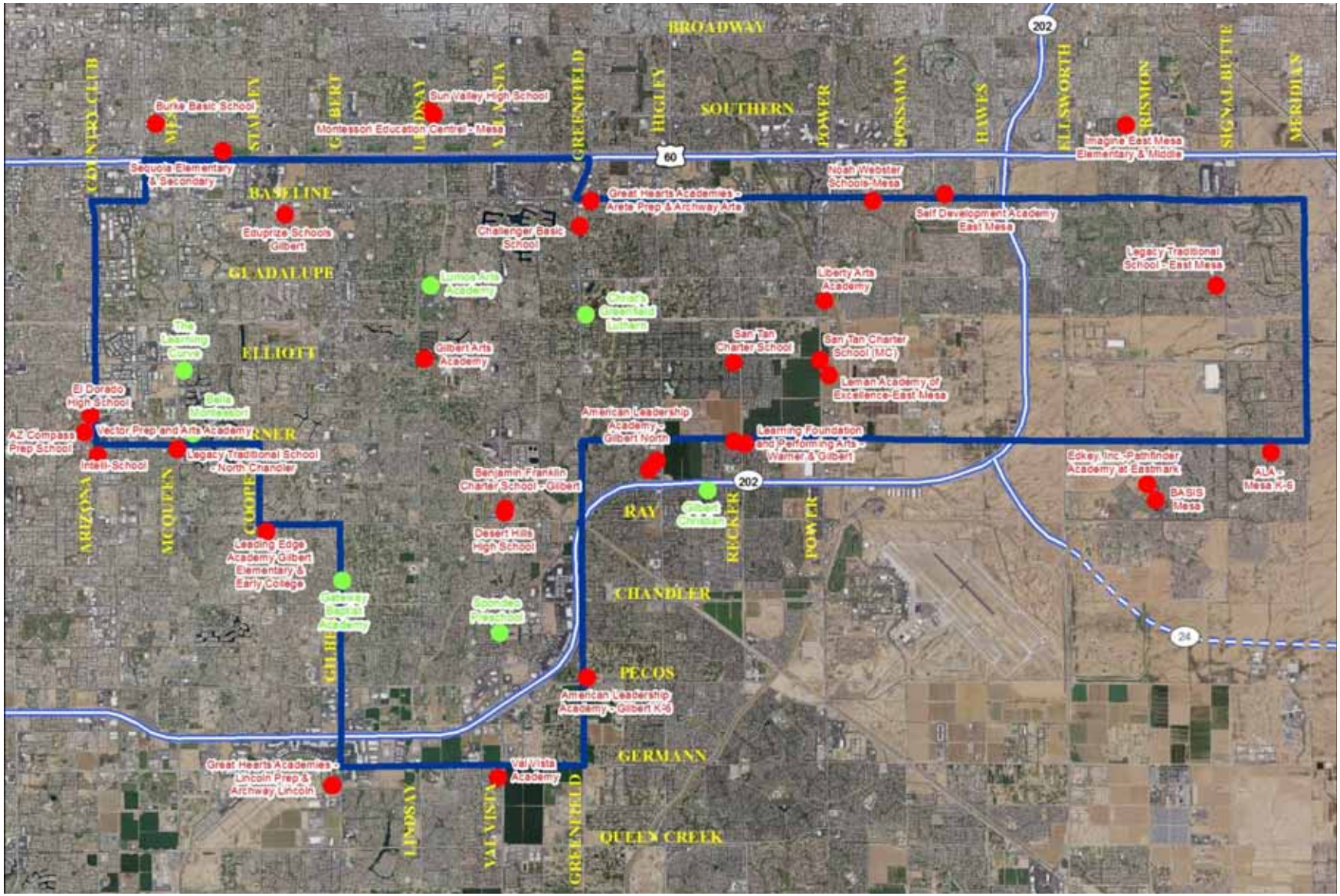


Table 5 shows charter school enrollment at the elementary and high school levels over the past ten years. The total number of charter schools located in and nearby the District has generally increased since the 2010/11 school year, accompanied by comparable gains in net enrollment, although in 2020/21 enrollment did drop due to the pandemic and two charter schools moved to locations outside of the District. The majority (80 percent) of the charter enrollment decline this year occurred at in-District charter schools (400 of the roughly 500-student total decline), which may be due to the fact that they have a larger share of K-8 students than do the area charter schools (87 percent versus 78 percent in 2019/20). Since 2016/17, area charter enrollment has increased by 34 percent (3,100 students), while in-District charter enrollment increased by 7 percent (450 students) during the same period.

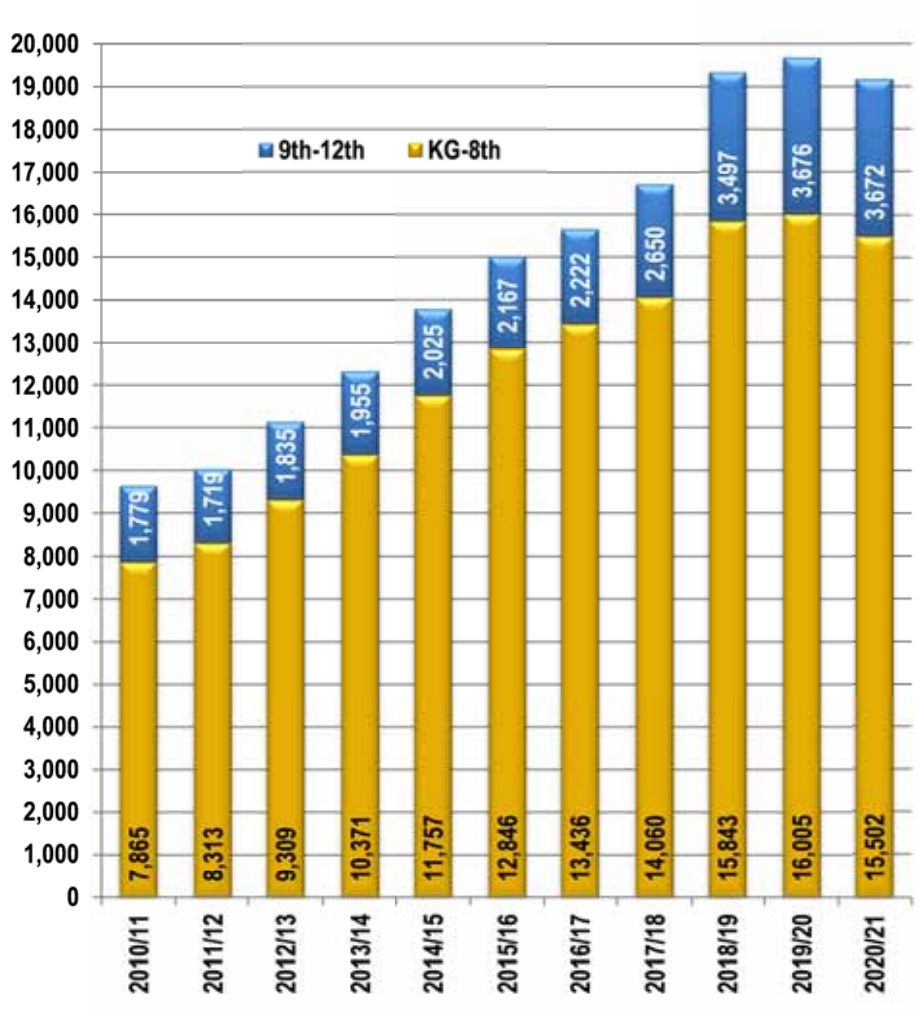
TABLE 5
ENROLLMENT IN LOCAL CHARTER SCHOOLS BY LEVEL

School Year	Number of Schools	KG-8th	Share	9th-12th	Share	KG-12	Annual Change
In District							
2010/11	14	4,868	86.7%	748	13.3%	5,616	
2011/12	14	5,201	87.6%	738	12.4%	5,939	323
2012/13	14	5,432	87.9%	749	12.1%	6,181	242
2013/14	13	5,414	89.8%	618	10.2%	6,032	-149
2014/15	13	5,834	92.5%	470	7.5%	6,304	272
2015/16	13	6,066	91.8%	544	8.2%	6,610	306
2016/17	12	6,009	90.6%	620	9.4%	6,629	19
2017/18	12	5,680	89.6%	658	10.4%	6,338	-291
2018/19	15	6,428	87.7%	903	12.3%	7,331	993
2019/20	15	6,537	87.3%	950	12.7%	7,487	156
2020/21	13	6,156	87.0%	923	13.0%	7,079	-408
Area Charter Schools							
2010/11	13	2,997	74.4%	1,031	25.6%	4,028	
2011/12	13	3,112	76.0%	981	24.0%	4,093	65
2012/13	15	3,877	78.1%	1,086	21.9%	4,963	870
2013/14	18	4,957	78.8%	1,337	21.2%	6,294	1,331
2014/15	21	5,923	79.2%	1,555	20.8%	7,478	1,184
2015/16	23	6,780	80.7%	1,623	19.3%	8,403	925
2016/17	24	7,427	82.3%	1,602	17.7%	9,029	626
2017/18	25	8,380	80.8%	1,992	19.2%	10,372	1,343
2018/19	25	9,415	78.4%	2,594	21.6%	12,009	1,637
2019/20	26	9,468	77.6%	2,726	22.4%	12,194	185
2020/21	26	9,346	77.3%	2,749	22.7%	12,095	-99
Total							
2010/11	27	7,865	81.6%	1,779	18.4%	9,644	
2011/12	27	8,313	82.9%	1,719	17.1%	10,032	388
2012/13	29	9,309	83.5%	1,835	16.5%	11,144	1,112
2013/14	31	10,371	84.1%	1,955	15.9%	12,326	1,182
2014/15	34	11,757	85.3%	2,025	14.7%	13,782	1,456
2015/16	36	12,846	85.6%	2,167	14.4%	15,013	1,231
2016/17	36	13,436	85.8%	2,222	14.2%	15,658	645
2017/18	37	14,060	84.1%	2,650	15.9%	16,710	1,052
2018/19	40	15,843	81.9%	3,497	18.1%	19,340	2,630
2019/20	41	16,005	81.3%	3,676	18.7%	19,681	341
2020/21	39	15,502	80.8%	3,672	19.2%	19,174	-507

Source: Arizona Department of Education; Applied Economics 2021.

Figure 5 shows that the enrollment growth in local charter schools had been heavily concentrated in the elementary grades. Of the 9,500-student increase since the 2010/11, roughly 80 percent have been K-8 students, and this group now comprises around 81 percent of enrollment in District-area charter schools. However, 9-12 charter enrollment growth rates have risen significantly in the past four years and hardly dropped at all during this last school year, posting increases of 19 percent in 2017/18, 32 percent in 2018/19, 5 percent last year, and zero percent this year. Since 2016/17, the average annual growth rate for area K-8 charter enrollment has fluctuated considerably, ranging from 4.6 percent in 2016/17 to 12.7 percent in 2018/19, 0.1 percent last year, and -3.1 percent this year.

FIGURE 5
DISTRIBUTION OF CHARTER ENROLLMENT BY LEVEL



Overall, total enrollment in area charter schools has grown by more than 9,500 students, or 99 percent, since 2010/11. It is important to point out that not all of the students attending these charter schools reside within the District, but their tremendous growth is undoubtedly a factor in the decline of District enrollment, especially at the elementary level.

Private schools do not have the same reporting requirements as charter or district schools, so data is often less accessible, although private school enrollment tends to be more stable than charter schools. The Private School Survey conducted by the National Center for Education Statistics is the only consistent source of private school enrollment data and it is only updated every 2 years; the 2017/18 enrollment figures provided by the survey are the most current that are available. Currently, there are five private schools operating in the District which enroll nearly 400 students (**Table 6**). In addition, there is one private school located within one mile of the District's boundary, Gilbert Christian School, which enrolls nearly 1,400 K-12 students.

TABLE 6
ENROLLMENT IN LOCAL PRIVATE SCHOOLS

School Name	Address	City	Zip	Grades Offered	Total K-12
In-District Private Schools					
Bella Montessori	700 S. Islands Drive West	Gilbert	85233	PK-K	6
Christ's Greenfield Lutheran School	425 N. Greenfield Road	Gilbert	85234	PK-8	230
Gateway Baptist Academy	2175 S. Gilbert Road	Gilbert	85295	K-12	42
Spondeo Preschool	2680 S. Val Vista Drive	Gilbert	85295	PK-K	1
Lumos Arts Academy	919 E. Guadalupe Road	Gilbert	85234	K-12	125
In-District Total					404
Area Private Schools*					
Gilbert Christian Schools	3632 E. Jasper Drive	Gilbert	85296	PK-12	1,370
Area Total					1,370
Total					1,774

Sources: NCES Private School Universe Survey (PSS), 2017-18 school year data; Private School Review, 2021; National Council for Private School Accreditation, 2021; Applied Economics 2021.
* Private schools located within approximately one mile of the District's boundaries.

3.0 Residential Development

3.1 Market Conditions

The foremost market issue in 2020-21 was the Covid-19 virus. Job losses in the spring due to the disease were massive but they were counteracted somewhat by financial transfers from the federal government. After the initial economic shock subsided predictions have varied on some points but, in general, a consensus has emerged that anticipates a partial recovery that continues throughout 2021. Unemployment levels are expected to remain above average during 2021 but, as a matter of perspective, the February 2020 rate of 3.5 percent was a 50-year low.

While the entire country has been impacted by this recession, some areas, such as Arizona and particularly metropolitan Phoenix, are better situated to recover more quickly and perhaps stronger than others. The 2007 recession was driven significantly by real estate speculation and a severely over-built housing market. Since the last recession there has been an emphasis in Arizona on establishing a more diversified economic base, including advanced manufacturing, bioscience, and financial and professional services. Companies are often attracted by a university system that is graduating large numbers of engineering, science, and mathematics students. Not only do these companies create a large number of jobs, but the new tech and manufacturing tend to pay better than average wages and new suppliers create additional employment. These types of jobs are also more insulated from economic downturns than many others, allowing for additional stability. While growth in the 2000's fell from the elevated levels of the 1990's and dropped sharply during the 2007-09 recession, overall population growth in the state has been solid (**Table 7**). The population in Arizona, especially in the metro areas, is expected to continue to grow, largely in response to the stronger, more solid economic footing that now exists.

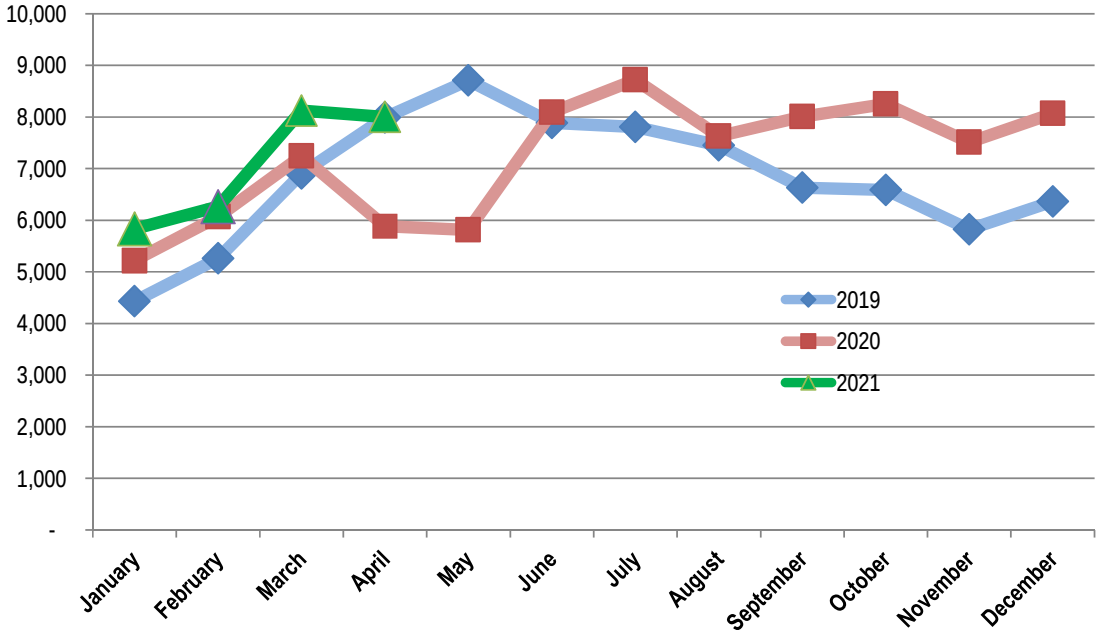
TABLE 7
POPULATION GROWTH IN THE SUN CORRIDOR

Population	2000	2005	2010	2015	2020	2000-2020
Maricopa County	3,092,927	3,577,074	3,824,058	4,076,438	4,439,220	1,346,293
Pima County	848,375	940,004	981,168	1,009,371	1,052,375	204,000
Pinal County	182,435	250,195	376,369	406,468	467,932	285,497
Yavapai County	169,520	196,629	210,899	217,778	236,426	66,906
Arizona	5,175,581	5,924,476	6,401,568	6,758,251	7,294,587	2,119,006
Change	**1995-2000**	**2000-2005**	**2005-2010**	**2010-2015**	**2015-2020**	**2000-2020**
Maricopa County	24%	16%	7%	7%	9%	44%
Pima County	13%	11%	4%	3%	4%	24%
Pinal County	27%	37%	50%	8%	15%	156%
Yavapai County	27%	16%	7%	3%	9%	39%
Arizona	21%	14%	8%	6%	8%	41%

Source: Arizona Commerce Authority; Applied Economics, 2021.

In the current environment the Phoenix housing market is significantly under-supplied, removing a negative factor that played such a large role in the last recession. According to data from the Arizona Regional Multiple List Service (ARMLS) there was only a 2.5 month supply of single family houses in January 2020, rather than the 5 to 6 month supply generally desired for a balanced market. The supply level in the metro area has fallen since then, to only about one month's supply by December 2020 and remaining at about a month's supply since as housing sales have been very strong following the abrupt reduction in activity in the spring of 2020 when the pandemic first jolted the economy (**Figure 6**). A slight drop in sales during August 2020 was quickly reversed and has remained strong. Lower sales activity at the beginning of the year is normal, but the trend in 2021 is again a sharp increase as the traditional "spring" sales season seems to arrive earlier each year.

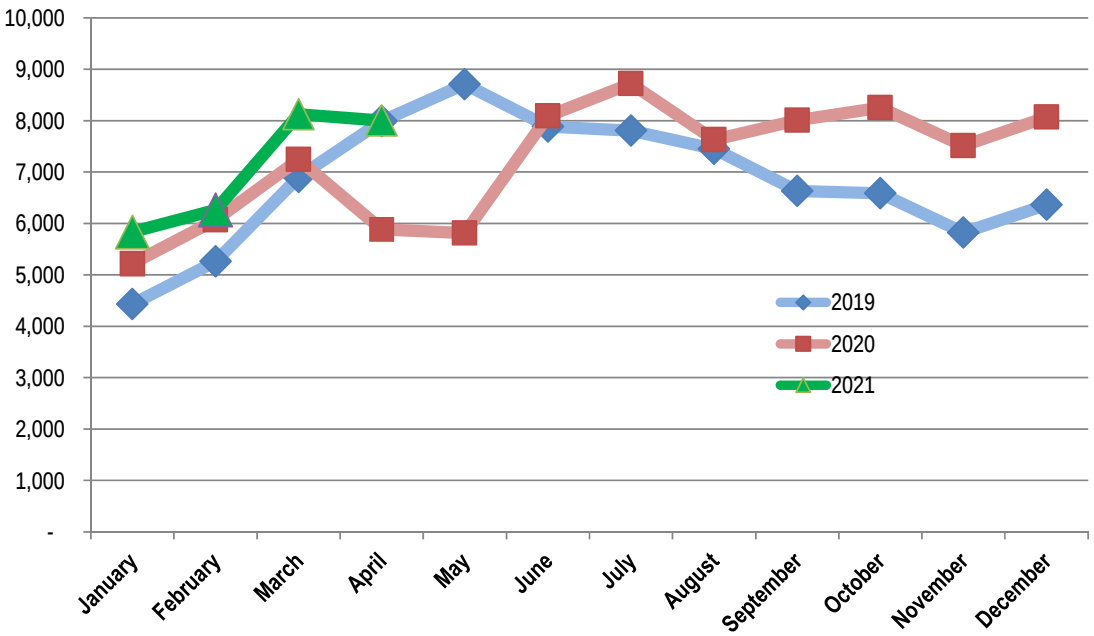
FIGURE 6
SALES OF SINGLE FAMILY HOMES



Source: Arizona Regional Multiple Listing Service, 2019-2021.

Pending sales can serve as a leading indicator of market strength (**Figure 7**). The reduced activity in spring indicated by this measure was very short in duration and purchaser interest escalated rapidly. Even though traditional home sales processes were upended by the Coronavirus, agents and builders were very quick to adapt with new techniques. Activity fell slightly in 2020 during the mid-summer months but remained stable until slowing late in the year. Some slowing in the final months of the year had been expected but overall activity in 2020 remained stronger than in 2019, and the regional housing market should continue to be strong. Activity in 2021 started out strong and has increased, though flat in April. Mortgage rates are at or below the lowest levels ever and are expected to remain low through 2021 while employment and population in Arizona continues to grow.

FIGURE 7
PENDING SALES OF SINGLE FAMILY HOMES



Source: Arizona Regional Multiple Listing Service, 2019-2021.

There has also been a shift in how people view and use their houses due to the pandemic. For some a house is viewed as a safe haven in ways an apartment unit is not. Remote working has underscored the need for office space in the residence. Builders have responded with new standards and options addressing space and health issues. These factors, along with the low mortgage rates, have encouraged people who were planning to purchase within a few years to advance their timetable.

Changes in the housing industry will continue to influence the local real estate market. Increased single family demand is already in evidence, and as increased construction drives up labor costs there will be new pressure on the multifamily market, which has experienced a softening of demand. Multifamily projects with financing in place will probably be completed, but new additions to supply are anticipated to slow.

Along with increased single family demand, there will likely be a desire for larger houses and lots as homes have become more central to family life, and even employment or educational needs. This will tend to move growth toward the outer parts of the metro area where land costs are lower. The focus on entry-level and first move-up housing will favor the west Valley, where land sales have already been very active.

The southeast Valley has been a major focus of growth for a long time and the area is rapidly being built out, but the future may bring new growth opportunities. In 2019, 4,140 acres of State Trust Land was annexed by Queen Creek. An auction in November 2020 for 2,783 acres on the south side of Apache Junction is targeted for a master planned community. The purchase price was over three times higher than the appraised value, with D.R. Horton the successful bidder. Transportation access is a vital aspect for major development, and State Route 24, which connects to Loop 202, will be extended to Ironwood Road in Pinal County, with construction starting near the end of 2020. Opening this land should have a massive impact on the east Valley and San Tan Valley to the south.

In northern Phoenix, new infrastructure is being installed in the I-17 corridor, which will enable new development of State Trust Land. The Phoenix City Council has approved a rezoning northwest of the Loop 303 and I-17, with a State land auction of 1,128 acres to Taiwan Semiconductor Manufacturing Co. in December. Much, but not all of this land is intended for employment uses, with manufacturing to start by 2024. Any housing in this area would likely be higher density uses but not include much, if any, entry level housing.

In central Pinal County, thousands of new manufacturing jobs are to be gained over the next few years. This will increase housing demand throughout the area. At this time most new housing is entry level, but increased employment opens the possibility for an expanded housing market.

The retail industry has been under pressure for years and the pandemic has caused even more problems. It should be expected that more retail land, both zoned and existing, will be converted to residential uses. Among those uses will likely be single family rental communities, which have become a rapidly expanding market segment; the separate units with no stairs or elevators are even more attractive under current circumstances for individuals that are not interested in purchasing single family houses.

A variety of negative factors could emerge to slow the housing market, especially declining affordability, but the near-term forecast is for continued strength. Future years will likely see some shifting in the market as different segments and locations react to evolving consumer dynamics, but the more solid underlying economic conditions in metro Phoenix should result in a more consistently resolute housing market.

3.2 Housing Construction

New housing development in the District has escalated rapidly since the last recession and it is currently benefitting from the exceptionally strong regional market. Permit activity over the past ten years is shown on **Table 8**. The building permit categories are intended to reflect correlations between the new housing units and the age structure of the households that occupy them. Group quarter facilities, such as nursing homes or dormitories, are not included as either retirement or multifamily housing.

Construction of single family housing has been very strong, averaging over 700 permits per year between 2015/16 and 2018/19 before surging past 1,000 permits last year. Development has been spread across density levels, although there has been a shift in recent years from lower to higher densities. This is an expected occurrence in a mature market with escalating prices. Over the decade, non-age-restricted single family housing has accounted for about 52 percent of all permitting while multifamily has grown to about 40 percent, and age-restricted housing accounting for the remainder. Multifamily has included few condominium projects. Apartment development has evolved to high-end, high-amenity complexes, which is also a result of the maturing residential market. The growing single family rental segment is also increasing rapidly in the District.

TABLE 8
HOUSING PERMITS

Housing Type	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	Total
Family Housing											
Single Family 2 du/ac or less	-	3	26	11	10	8	14	2	-	-	74
Single Family 2.01 - 3.5 du/ac	121	136	147	175	122	150	162	63	225	275	1,576
Single Family 3.51 - 4.5 du/ac	162	207	41	121	239	196	235	393	161	219	1,974
Single Family 4.51 - 6 du/ac	5	-	-	-	107	308	251	102	181	342	1,296
Single Family 6.01du/ac & Over	-	-	-	2	91	93	117	52	35	64	454
Single Family Attached	-	-	-	-	-	-	6	70	140	151	367
Total Single Family	288	346	214	309	569	755	785	682	742	1,051	5,741
Condominium/Townhouse	-	-	-	26	42	7	31	15	-	8	129
Rental SF	-	-	-	-	-	-	116	40	-	369	525
Standard Courtyard Apts	-	275	107	524	200	278	687	-	-	-	2,071
Urban/Lifestyle Apts	-	-	-	254	148	238	252	104	297	380	1,673
Total Multifamily	-	275	107	804	390	523	1,086	159	297	757	4,398
Total Non-Age-Restricted	288	621	321	1,113	959	1,278	1,871	841	1,039	1,808	10,139
Age-Restricted Housing											
Single Family 2.01 - 3.5 du/ac	27	31	38	55	85	63	98	16	8	-	421
Single Family 3.51 - 4.5 du/ac	11	5	25	7	6	8	-	29	39	3	133
Single Family 6.01du/ac & Over	11	12	6	31	22	39	-	-	-	-	121
Single Family Attached	15	14	40	30	27	8	-	-	-	22	156
Condominium/Townhouse	-	-	-	-	-	-	20	52	55	2	129
Total Age-restricted	64	62	109	123	140	118	118	97	102	27	960
Total	352	683	430	1,236	1,099	1,396	1,989	938	1,141	1,835	11,099

Sources: Maricopa Association of Governments; Construction Monitor; Maricopa County Assessor; Applied Economics, 2021.

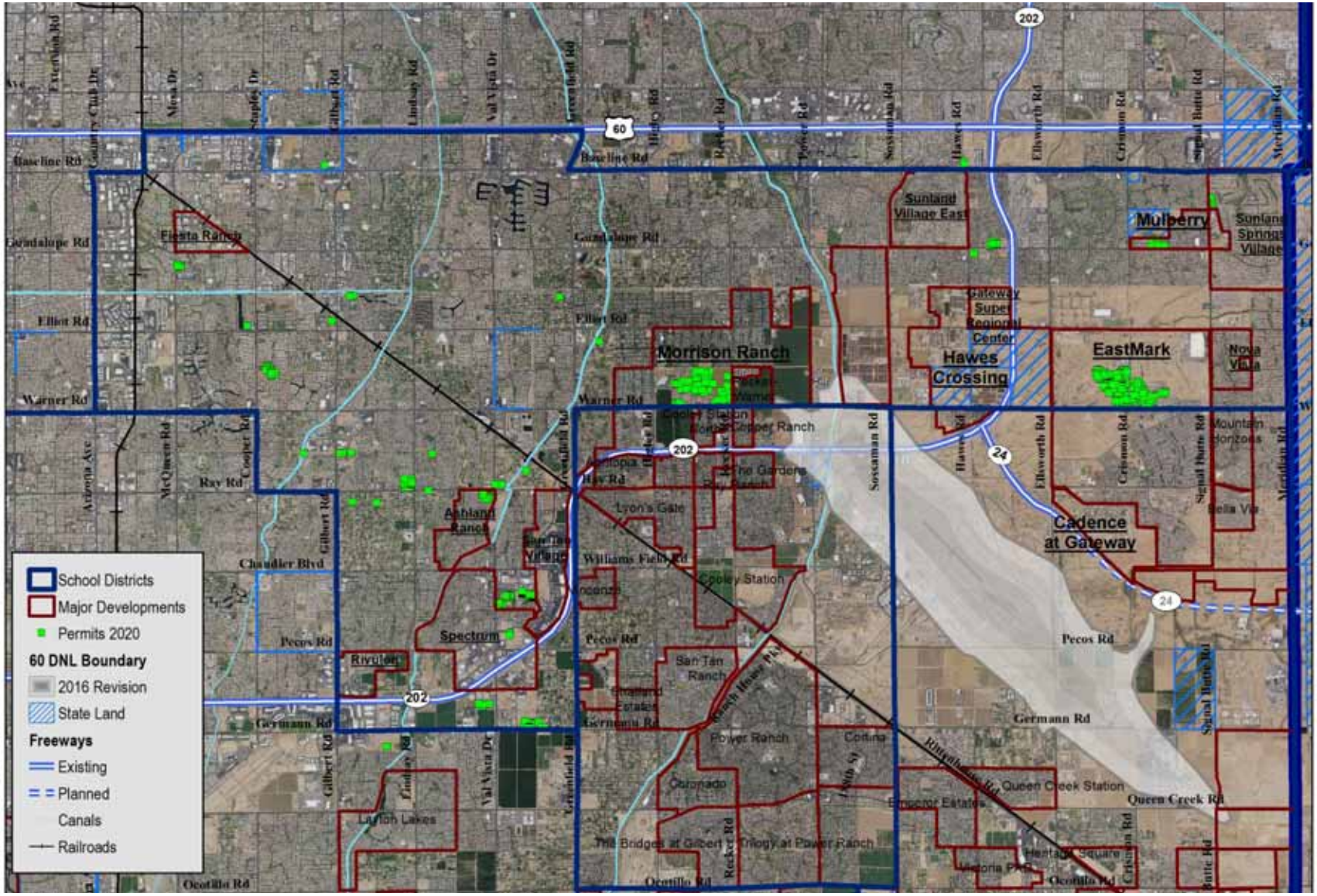
Another view of permit activity in the District is in **Table 8A** showing single family, non-age-restricted permits by quarter. Average permit levels have fallen slightly in 2020 as several subdivisions have approached or attained buildout; there is a clear increase in activity in 2019 and 2020 compared to 2018, which was a year of good housing production. Recent development activity in the District is illustrated on **Map 7** with housing permits for 2020 marked in green

TABLE 8A
HOUSING PERMITS BY QUARTER

	2018					2019					2020				
Housing Type	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Total	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Total	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Total
Single Family 2 du/ac or less	-	-	-	-	-	-	-	-	-	-	-	-	-	8	8
Single Family 2.01 - 3.5 du/ac	14	9	11	37	71	79	98	98	92	367	47	38	43	35	163
Single Family 3.51 - 4.5 du/ac	97	116	34	18	265	51	58	69	67	245	46	37	75	40	198
Single Family 4.51 - 6 du/ac	12	33	36	53	134	39	53	86	66	244	92	98	34	78	302
Single Family 6.01du/ac & Over	8	1	2	2	13	8	23	16	27	74	4	17	22	16	59
Single Family Attached	31	31	38	24	124	24	54	61	5	144	74	11	89	44	218
Total Single Family	162	190	121	134	607	201	286	330	257	1,074	263	201	263	221	948

Sources: Maricopa Association of Governments; Construction Monitor; Maricopa County Assessor; Applied Economics, 2021.

MAP 7
RESIDENTIAL PERMITTING



3.3 Residential Development

3.3.1 Future Development Potential

The potential housing supply in the District is estimated at over 16,000 units, as detailed on **Table 9** by type of housing and according to the general time period during which construction may begin. The timing categories only indicate a beginning of activity, with major projects generally developing over a number of years. The Infill category includes rural parcels, single lots within existing neighborhoods, and small custom projects likely to be under development intermittently over a number of years. Both unit potential and timing estimates on this table will change as new information becomes available.

As the District becomes increasingly built out, future development is expected to shift, with single family accounting for less than 40 percent of the potential while multifamily increases to a 60 percent share. Because of the nature and siting of such projects, often on planned commercial properties, single family rentals will likely have a much larger share of the multifamily market than currently indicated. The few retirement projects in the District were built out in 2020 and so far there have been no new age-restricted projects proposed, although that could change.

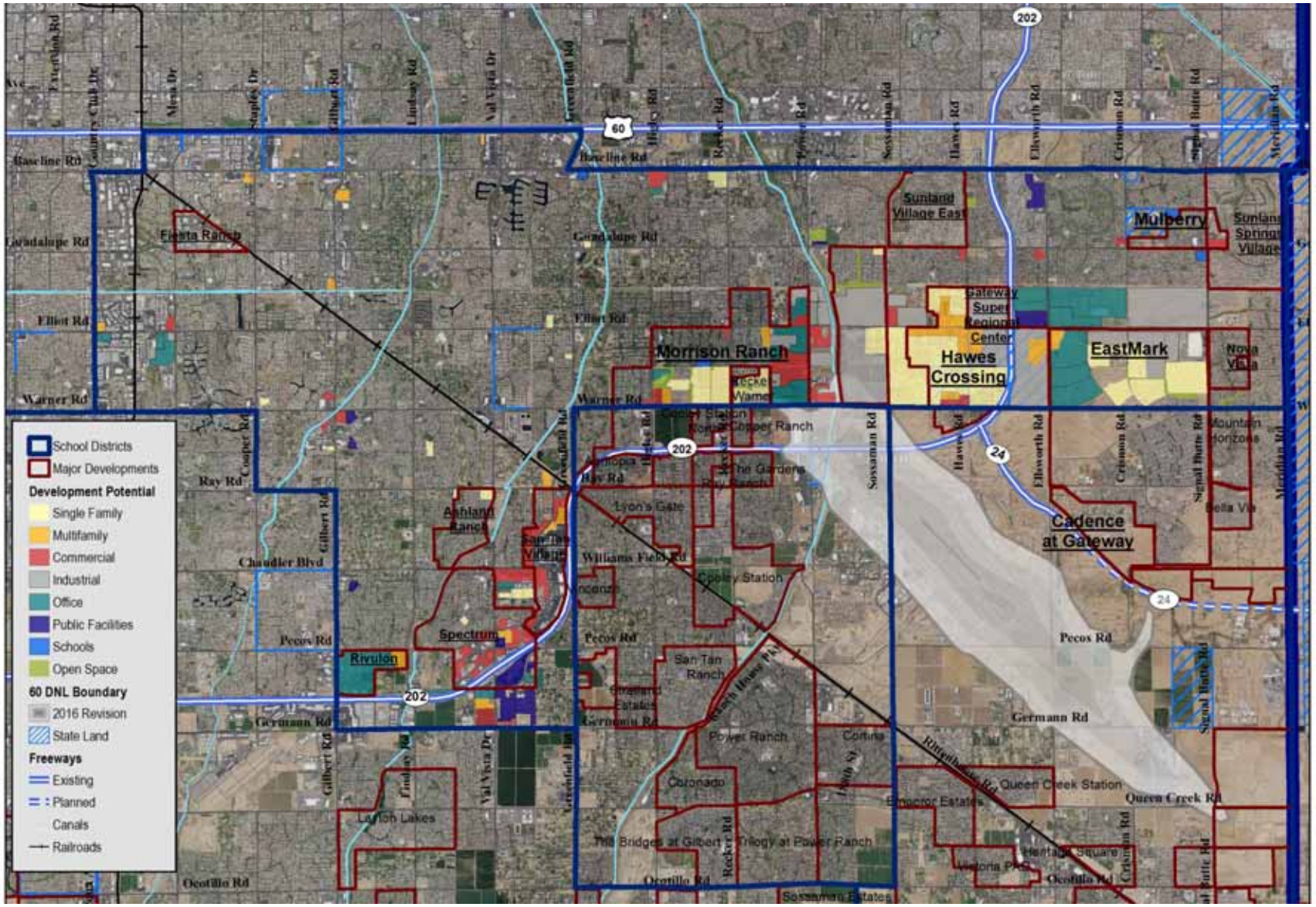
TABLE 9
POTENTIAL NEW HOUSING BY DEVELOPMENT TIMELINE

	Existing		Vacant Land					
Housing Type	Infill	Projects	1 Year	2-3 Years	3-5 Years	5-10 Years	10+ Years	Total
Single Family 2 du/ac or less	3	16	-	-	20	236	-	275
Single Family 2.01 - 3.5 du/ac	-	175	-	446	-	-	180	801
Single Family 3.51 - 4.5 du/ac	830	90	55	350	420	-	-	1,745
Single Family 4.51 - 6 du/ac	-	-	-	363	276	-	-	639
Single Family 6.01du/ac & Over	-	34	-	96	286	893	750	2,059
Single Family Attached	-	191	-	207	-	-	316	714
Total Single Family	833	506	55	1,462	1,002	1,129	1,246	6,233
Condominium/Townhouse	92	-	-	-	-	696	410	1,198
Rental SF	-	-	324	-	90	-	-	414
Standard Courtyard Apts	-	-	-	655	520	909	2,460	4,544
Urban/Lifestyle Apts	-	98	214	991	1,955	-	773	4,031
Total Multifamily	92	98	538	1,646	2,565	1,605	3,643	10,187
Total	925	604	593	3,108	3,567	2,734	4,889	16,420

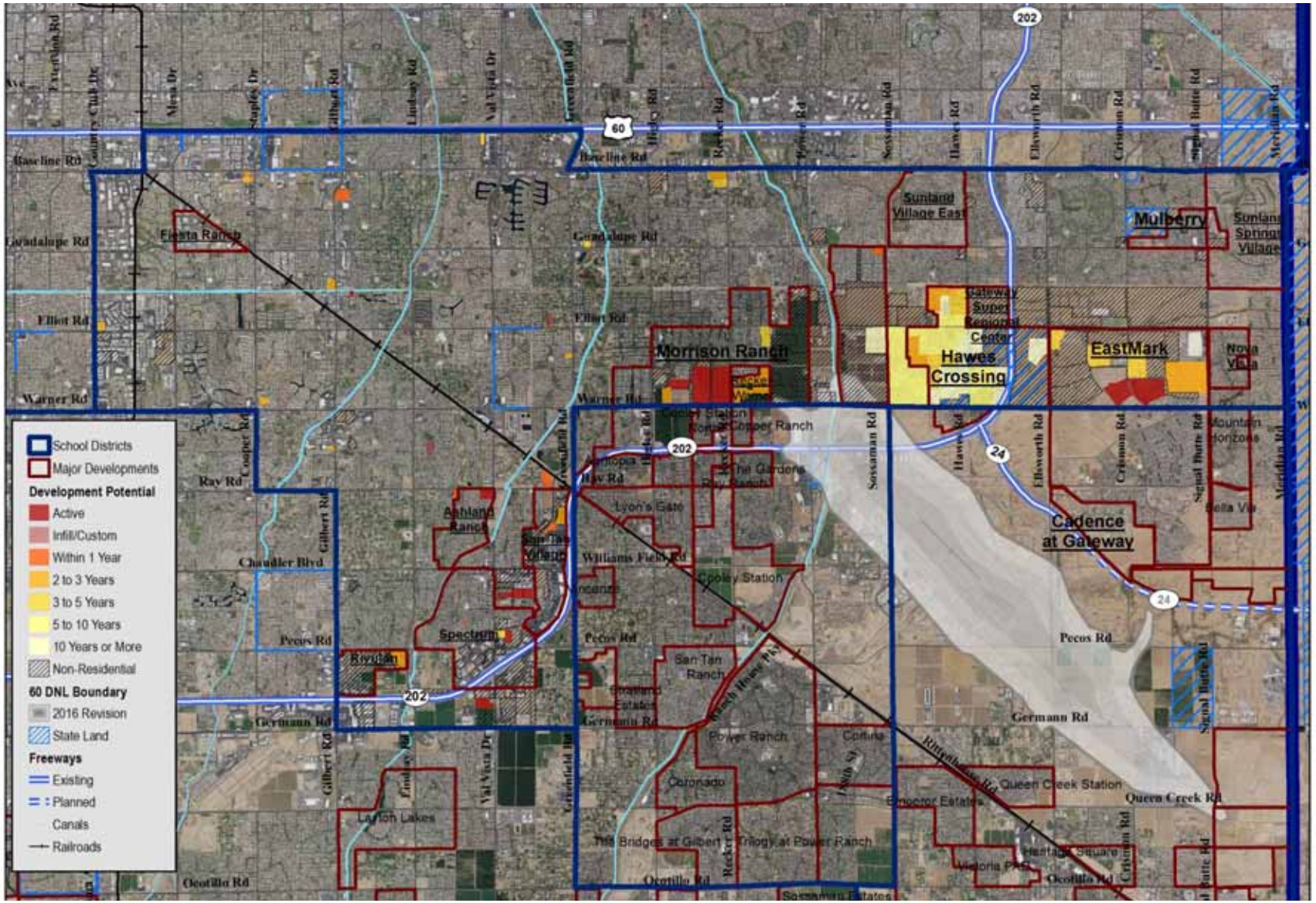
Sources: City of Gilbert; City of Mesa; Applied Economics, 2021.

Future land use and development timing by area is depicted in the following maps (**Maps 8 and 9**). The only area with large tracts of undeveloped land is in the eastern portion of the District, particularly at Hawes Crossing. Residential development will continue in the western portion of the District but the new development will be multifamily or high-density, single family on infill parcels. These projects will often involve parcels previously zoned for commercial uses, typically 10 to 15 acres, or the redevelopment of older properties, which could be commercial or residential.

MAP 8
FUTURE LAND USE



MAP 9
DEVELOPMENT TIMING



The presence of a variety of housing options lends stability to the market. One reason for the severe housing impacts in Pinal County during the 2007 recession was the lack of diversity; entry level housing dominated the local market and when it collapsed the damage was widespread. At this time there is little pricing data available for the District since so many subdivisions have sold out, even when still under construction. New housing in the District is now largely targeted to the move-up or executive markets, as shown in **Table 10**. The only new houses priced below the Phoenix metro median of $403,000 are the attached products at Annecy. As an area with mature housing, there would be more entry-level options in the resale market.

TABLE 10
HOUSING CHARACTERISTICS AT SELECTED DISTRICT SUBDIVISIONS

Builder	Subdivision	Models offered	Sq. Ft. Min	Beds Min	Price Min	Sq. Ft. Max	Beds Max	Price Max	Price/SqFt Min-Max	
Camelot Homes	Morrison Ranch: Heirloom	4	3,094	3	$ 999,500	5,427	6	$1,255,900	$323	$231
New Village Homes	Andalucia Villas	3	2,008	3	$ 428,990	2,410	5	$ 442,990	$214	$184
Taylor Morrison	Morrison Ranch: Landmark	6	1,955	3	$ 578,990	3,491	4	$ 668,990	$296	$192
Toll Brothers	Morrison Ranch: Flora	4	2,955	3	$ 908,995	4,955	4	$1,083,995	$308	$219
Tri Pointe Homes	Annecy: Towns	4	1,194	2	$ 351,500	1,921	3	$ 421,500	$294	$219
Woodside Homes	Eastmark: Tranquility	8	2,201	3	$ 527,990	4,059	5	$ 659,990	$240	$163

Source: Builder websites; Applied Economics, May 18-19, 2021.

3.3.2 Development Projects

In the spring of 2020 the housing market plummeted as the Covid-19 pandemic drastically curtailed economic activity. Unexpectedly, the housing industry rapidly recovered due to the fact that so much of the construction work takes place outdoors and because builder's quickly devised methods to ensure public safety while conducting sales. Buyers gained a new outlook on the benefits of a single family house and very low interest rates provided a means to move forward with purchases. The result has been an expanded housing market with production rates straining the labor and materials supply.

The local market is no exception, especially since it was quite popular well before the pandemic. Single family production is forecast to be strong in the near-term, though at lower rates than being experienced currently. This is due to buildout in subdivisions at Morrison Ranch and production shifts at Eastmark to areas outside the District. New developments will be starting but not with the volume to replace past projects. Production levels in the last half of the projection period are expected to decline significantly though the level will depend in large part on construction rates at Hawes Crossing.

Eastmark: Woodside Homes; Crismon and Elliot Roads; 1,700 estimated total lots – 850 remaining.
This has been one of the most successful master planned communities in the nation. One likely reason for this is that planning has always been flexible and has evolved along with the market. Since the project has an employment as well as commercial and residential components there have been additional factors involved. In early 2021 DMB Associates and Brookfield Residential introduced some new revisions to the master plan, shifting business park and residential configurations on land in the northern portion of the community that lies within the District. At this time new subdivisions being opened are outside the District so housing starts in the

District will be minimal this year. While the locations are being altered, the number of new single family lots under the new revised plan is not yet known, but it is not expected to be substantially different than previous estimates. New in-District construction is not anticipated until about 2023 with buildout to be reached about 2025 to 2026.

Morrison Ranch: Camelot Homes, Fulton Homes, Richmond American, Taylor Morrison, Toll Brothers, Tri Pointe Homes (Maracay); Warner and Higley Roads; 3,680 total lots – 270 remaining.

This master planned community has been very successful since its beginning in 2004 (right); some subdivisions have sold out faster than expected and phased releases of houses are taking place at others. In addition, a small parcel once planned for retail use is being graded for a small subdivision, which is another sign of the strength and variation of the market. Single family development is expected to attain buildout in 2022 or early 2023. Remaining land had been planned for low-density multifamily and small-scale retail but plans were unveiled in March 2021 to increase multifamily use. This has met local opposition and there will not likely be resolution of the issue until at least late 2021 or early 2022.

Warner Meadows: Lennar Homes; Warner and Recker Roads; 476 total lots including 163 townhouses.

Grading and infrastructure work was underway on this project in late spring 2021 (left). Plans are for house construction to commence about September or October 2021, with the first closings spring 2022. The project is platted to have four single family product lines in a range of densities plus an attached townhouse parcel. Production levels are anticipated to be very high with buildout attained in about three years or less.

Hawes Crossing: Builders undetermined; Hawes and Elliot Roads; 2,900 estimated single family lots, 2,500 multifamily units.

This 1,200-acre project is a combination of dairy farms and State land and will be the last master plan in the District. Zoning approvals were reached in April 2020 and devotes approximately 56 percent of the land for employment uses and the rest to a wide range of single family and multifamily designations, including a significant amount for mixed use development. The land is being marketed in parcels rather than as a single entity. It is anticipated that residential development will begin in about 2023 or 2024, given the current housing market, but the rate of production will largely depend on the size of the development parcels and the builders

involved. It is expected that new employment opportunities being added in the vicinity will provide much of the growth catalyst, with most of the production occurring in the last half of the projection period.

Annecy: Tri Point Homes (Maracay); Val Vista and Williams Field Roads; 900 total units – 170 remaining.

New housing construction began at this community in 2005 before it fell dormant in 2008 due to the recession. Construction restarted in 2017 and has proceeded strongly since then (right). At this time the final two subdivisions are active with one expected to build out in 2021 and the other in 2022/23. These units are all single family attached products.

Other Projects:

While subdivisions in major developments hold the largest share of new single family housing potential, multifamily and small infill projects will continue to provide additions to supply in an area where large parcels of vacant land are nearly exhausted. Much of this new growth will be in the San Tan Village area, which has already seen considerable growth in recent years. In spring 2021, vertical construction was underway at Novel Val Vista Square apartments (317 units) and Elevation at the Village (214 units); in addition, grading is underway at the single family rental project Bungalows on Ray. All of these projects are located on or near San Tan Village Parkway from Pecos to Ray Roads.

The other prime area for this type of growth can be found in the older portion of the District, from near Gilbert Road and to the west, and the reinvigorated downtown is a target for new growth. Aspire Heritage is a small 32-lot attached single family project that is currently active. The Heritage Park mixed use project will add 250 apartments and is in design review. To the south of downtown, by the Civic Center, the 216-unit Watermark apartments were permitted and under construction in late 2020. On the west side of Gilbert Road, grading is anticipated to start in summer 2021 for the 44 townhouses at The Carson. North of downtown, on Gilbert Road, is another Bungalows single family rental project (165 units) that is expected to be started during 2021. At Stapley and Baseline Roads, Gilbert Commons is in the approval process for 205 apartments. At Country Club and Elliot another 252 apartments are planned at Uptown Commons and are expected to be under construction by late 2021 or early 2022.

4.0 District Projections

4.1 Population & Housing

Table 11 provides annual housing, household and population projections for the District through 2030/31 based on the annual absorption of new housing units and real estate market and demographic trends. The housing unit construction schedule developed for the 10-year period is based on recent and forecast construction trends, land availability and ownership, and data reflecting economic growth trends in the District and the Southeast Valley. The projections call for the addition of 10,900 housing units over the next ten years, nearly a 14 percent increase over the nearly 80,400 units that currently make up the District's housing inventory. The majority of new units added during the projection period are expected to be multifamily (nearly 6,600 units or 60 percent), while just more than 4,300 of the new units are projected to be single family. By 2030/31 the District's housing inventory is expected to total more than 91,300 units.

TABLE 11
HISTORIC AND PROJECTED POPULATION AND HOUSING

		Housing Units				Occupancy	Households		
Year	Population	Total*	New	New SF	New MF	Rate	Total	Change	Pop/HH
2010/11	184,433	69,306	431	431	0	91.4%	63,380	246	2.910
2011/12	184,216	69,658	352	352	0	91.3%	63,621	241	2.896
2012/13	186,356	70,341	683	408	275	92.1%	64,751	1,130	2.878
2013/14	187,425	70,771	430	323	107	92.5%	65,497	746	2.862
2014/15	190,308	72,007	1,236	432	804	93.1%	67,074	1,578	2.837
2015/16	192,142	73,106	1,099	709	390	93.2%	68,151	1,076	2.819
2016/17	195,498	74,502	1,396	873	523	93.7%	69,778	1,627	2.802
2017/18	198,941	76,491	1,989	903	1,086	93.6%	71,592	1,814	2.779
2018/19	200,517	77,429	938	779	159	93.6%	72,500	908	2.766
2019/20	202,731	78,570	1,141	844	297	93.8%	73,672	1,172	2.752
2020/21	206,490	80,405	1,835	1,078	757	93.8%	75,458	1,786	2.737
2021/22	209,763	82,214	1,809	666	1,143	93.9%	77,222	1,764	2.716
2022/23	211,865	83,532	1,318	468	850	94.0%	78,520	1,298	2.698
2023/24	213,785	84,975	1,443	453	990	93.9%	79,791	1,271	2.679
2024/25	215,558	86,291	1,316	546	770	93.8%	80,941	1,149	2.663
2025/26	217,233	87,501	1,210	649	561	93.7%	81,988	1,047	2.650
2026/27	218,549	88,671	1,170	405	765	93.6%	82,996	1,008	2.633
2027/28	218,749	89,292	621	331	290	93.5%	83,488	492	2.620
2028/29	219,320	90,012	720	291	429	93.5%	84,161	673	2.606
2029/30	219,755	90,672	660	272	388	93.5%	84,778	617	2.592
2030/31	220,160	91,327	655	255	400	93.5%	85,391	612	2.578
2020/21 - 2029/30			10,922	4,336	6,586			9,933	

Source: Applied Economics, 2021.
Bolding Indicates Actuals

The increased presence of multifamily housing could enable younger families to live in the District; however, the majority of the units planned are targeted to young, working professionals, empty-nesters and retirees. Although the population per household is expected to decline by about six percent over the next ten years, due to the aging of the population and the influx of multifamily units, the additional households are projected to yield a total District population of nearly 220,200 people by 2030/31. This 13,700-person addition equates to a population increase of 6.6 percent over the 2020/21 estimate.

4.2 Enrollment

In addition to the volume and market orientation of household growth, trends in per-household student generation and the Enrollment-Population ratios are key factors used in determining future enrollment levels. The first factor, student generation rate, refers to the expected number of school-age persons (aged 5 to 17 years old) per household. As shown in **Table 12**, the District currently has nearly 43,700 school-age persons, implying an average generation rate of 0.579 school-age persons per household. This rate has fallen by about 17 percent since 2000/01 due to the aging of the existing population, the addition of multifamily housing and newer, more expensive single family housing (which has attracted older households with fewer school-age children).

TABLE 12
SCHOOL-AGE POPULATION, TOTAL ENROLLMENT, AND E-P RATIO

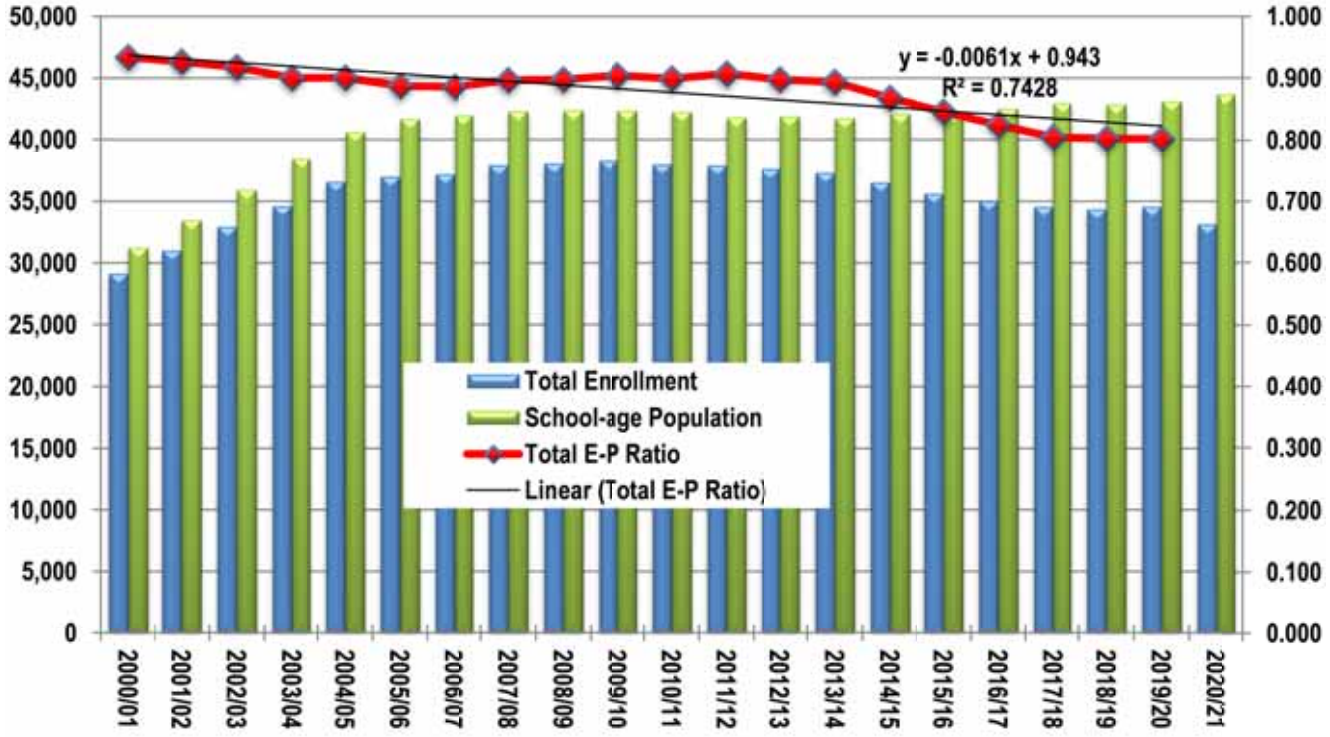
		School-Age Population *		K-12 Enrollment		Total	Enrollment -
Year	Households	Total	Per HH	Total	Per HH	Difference	Population Ratio
2000/01	44,552	31,245	0.701	29,174	0.655	2,071	0.934
2001/02	49,212	33,483	0.701	31,021	0.630	2,462	0.926
2002/03	52,263	35,900	0.700	32,941	0.630	2,959	0.918
2003/04	55,147	38,435	0.697	34,597	0.627	3,838	0.900
2004/05	58,428	40,631	0.695	36,582	0.626	4,049	0.900
2005/06	60,801	41,683	0.686	36,986	0.608	4,697	0.887
2006/07	61,666	41,969	0.681	37,170	0.603	4,799	0.886
2007/08	62,421	42,306	0.678	37,919	0.607	4,387	0.896
2008/09	63,024	42,398	0.673	38,061	0.604	4,337	0.898
2009/10	63,134	42,357	0.671	38,292	0.607	4,065	0.904
2010/11	63,380	42,250	0.667	37,977	0.599	4,273	0.899
2011/12	63,621	41,786	0.657	37,884	0.595	3,902	0.907
2012/13	64,751	41,895	0.647	37,599	0.581	4,296	0.897
2013/14	65,497	41,746	0.637	37,294	0.569	4,452	0.893
2014/15	67,074	42,114	0.628	36,529	0.464	5,585	0.867
2015/16	68,151	42,152	0.619	35,624	0.454	6,528	0.845
2016/17	69,778	42,515	0.609	35,022	0.436	7,493	0.824
2017/18	71,592	42,970	0.600	34,542	0.420	8,428	0.804
2018/19	72,500	42,866	0.591	34,352	0.408	8,514	0.801
2019/20	73,672	43,122	0.585	34,544	0.398	8,578	0.801
2020/21	75,458	43,671	0.579	33,149	0.366	10,522	0.759

Source: Applied Economics, 2021.
* Population age 5 through 17, corresponds with Kindergarten through 12th grade.

The second factor affecting enrollment projections is the ratio between the District's K-12 enrollment and the number of school-age persons living in the District, referred to herein as the Enrollment-Population (E-P) ratio. Due to the growing number of educational alternatives and open enrollment policies, the E-P ratio has become increasingly important when conducting enrollment projections. Assuming a school-age population of 43,671 and total enrollment of 33,149 students, results in a difference of 10,500 students and a District E-P ratio of 0.759, or 75.9 percent in 2020/21.

Please note that the E-P ratio is based on the net difference between the school-age population and *total District enrollment*; this difference includes the loss of some 16,100 in-District school-age persons to other providers and the gain of roughly 5,500 students at District schools from outside of the District. As illustrated in **Figure 8**, the difference between the school-age population and total enrollment has been increasing steadily in the District; as a result, the District's E-P ratio has generally declined since 2001/02, although it stabilized at roughly 80 percent between 2017/18 and 2019/20 due to increasing out-of-District enrollment. The decline this year is due to the anomalous effects of the COVID-19 pandemic.

FIGURE 8
LONG TERM TRENDS IN SCHOOL-AGE POPULATION, TOTAL ENROLLMENT AND E-P RATIO

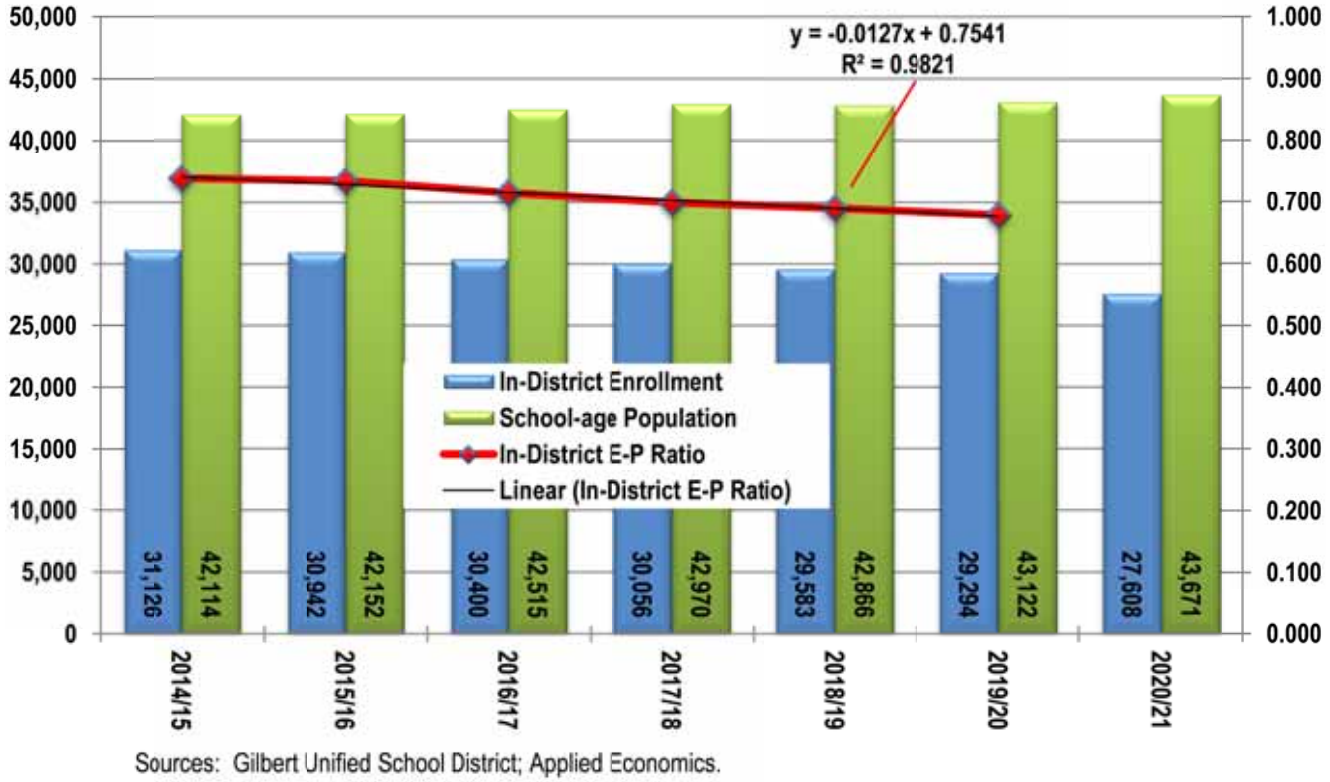


Sources: Gilbert Unified School District; Applied Economics.

The *in-District* E-P ratio, referred to as the "service rate," can also be used to assess how successful the District is in enrolling the school-age population that resides within the District; this is done by eliminating students that are enrolled but live outside of the District's boundaries from the total. The service rate is based on the difference between the school-age population and *in-District enrollment*. In 2020/21, in-District enrollment totaled 27,600 students, resulting in a difference of about 16,100 persons and a service rate of 63.2 percent,

which is considerably lower than the E-P ratio (75.9 percent) that is based on the District's total enrollment. Since 2014/15, the service rate has decreased by nearly 15 percent, including the sharp decrease in this year, as shown in **Figure 9**.

FIGURE 9
RECENT TRENDS IN SCHOOL-AGE POPULATION, IN-DISTRICT ENROLLMENT AND SERVICE RATE



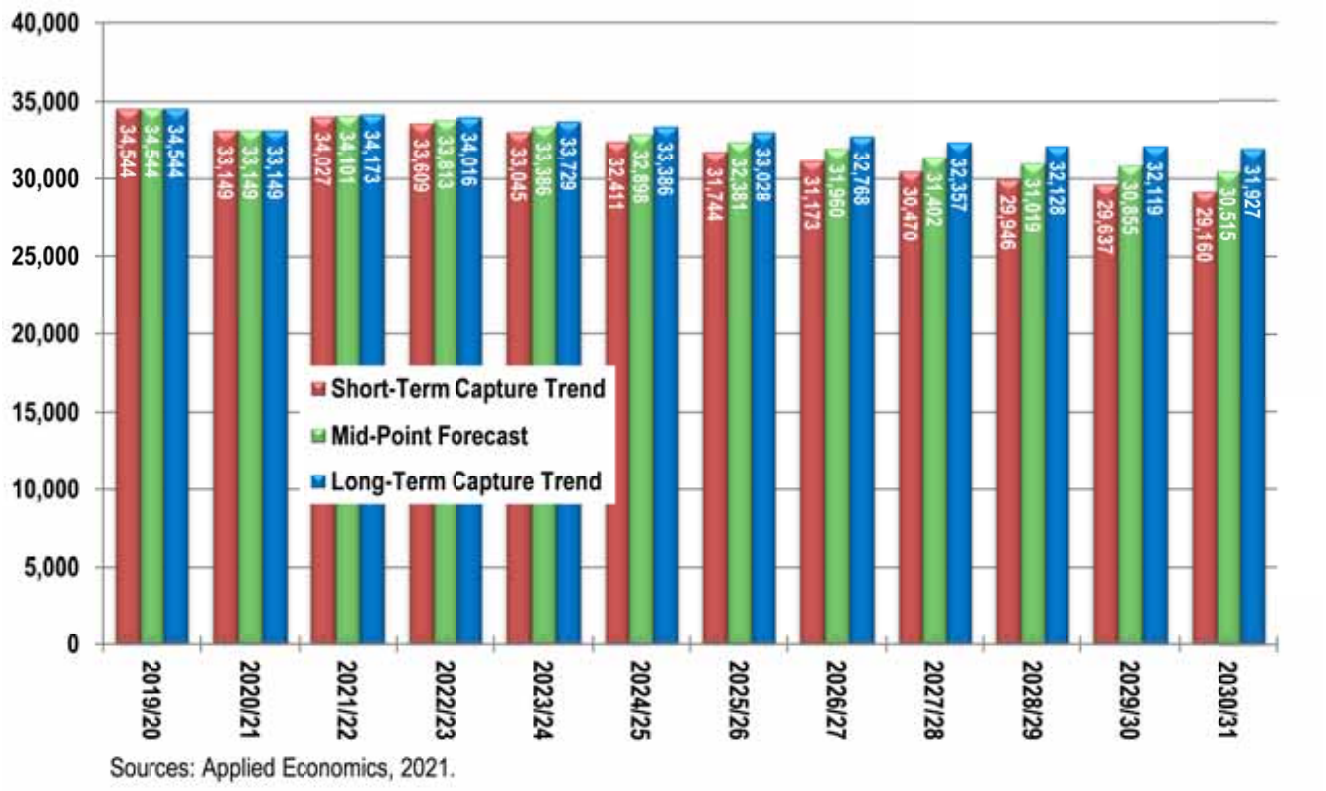
Sources: Gilbert Unified School District; Applied Economics.

The service rate may fluctuate upward or downward depending on the real or perceived quality of education offered by the District, the number, convenience, and perceived value of other education options, and a myriad of other factors that are beyond the scope of this study. However, we are not aware of any school districts in Arizona that have experienced a significant service rate increase over the past fifteen years, and nearly all have experienced some level of decline. As a result, the enrollment projections contained herein have been formulated under three scenarios.

The "Long-Term Capture Trend" assumes a more gradual decline in the service rate (from 63.2 to 60.9 percent). The "Short-Term Capture Trend" assumes a more aggressive decline of the in-District E-P ratio (from 63.2 to 54.5 percent). Finally, the "Mid-Point" forecast uses a service rate that reflects the mid-point between the Long-Term and Short-Term Capture Trend service rates (from 63.2 to 57.6 percent). Out-of-District enrollment is the same in each scenario and is presumed to remain relatively stable throughout the 10-year period as growth in the school-age population slows and eventually begins to decline in the second half of the projection period.

Despite the projected addition of nearly 10,000 households by 2030/31, the continued decline in school-age population per household is expected to result in a net loss of 140 school-age persons during the 10-year period. When the projected school-age population is combined with a falling service rate, each scenario projects a decline in total enrollment by 2030/31, although the rate of decline varies. **Figure 10** compares the K-12 enrollment projections by scenario, illustrating the magnitude of the various assumptions regarding the service rate over time. As the presence of alternative providers has grown, the service rate has increasingly become one of the most important factors affecting projections, and in many districts it is the most important factor in determining enrollment. For discussion purposes, the analyses presented in the remainder of this report are based on the assumptions presented in the Mid-Point forecast scenario.

FIGURE 10
DISTRICT ENROLLMENT PROJECTIONS BASED ON ALTERNATIVE SERVICE RATE SCENARIOS



Sources: Applied Economics, 2021.

Table 13 provides a more detailed review of recent past and projected enrollment changes by showing enrollment by grade cohort, in this case employing a Kindergarten to 6th grade (K-6), 7th to 8th grade (7-8) and 9-12 cohort summation. Assuming a moderate service rate decline, the District is expected to experience a loss of about 2,600 students by 2030/31 (roughly 8 percent of 2020/21 enrollment), yielding total enrollment of roughly 30,500 K-12 students. Although enrollment is expected to increase next year to compensate for the heavy losses caused by the pandemic, it is expected to decline by an average of 1.2 percent per year for the remainder of the projection period.

After increasing by nearly five percent next year, K-6 enrollment is projected to decline by an average of one percent per year through 2026/27 and then stabilize for the remainder of the projection period. As a result, projected K-6 enrollment for 2030/31 is almost exactly the same as current enrollment, and about 1,000 students (6 percent) less than the 2019/20 school year.

TABLE 13
ENROLLMENT PROJECTIONS BY LEVEL: MID-POINT FORECAST

	Enrollment by Level				K-12 Total		
Fall	K-6	7-8	K-8	9-12	Enrollment	Change	% Change
2010/11	19,043	6,552	25,595	12,382	37,977	-315	-0.8%
2011/12	19,019	6,469	25,488	12,396	37,884	-93	-0.2%
2012/13	18,649	6,472	25,121	12,478	37,599	-285	-0.8%
2013/14	18,137	6,408	24,545	12,749	37,294	-305	-0.8%
2014/15	17,537	6,191	23,728	12,801	36,529	-765	-2.1%
2015/16	16,883	5,924	22,807	12,817	35,624	-905	-2.5%
2016/17	16,629	5,710	22,339	12,683	35,022	-602	-1.7%
2017/18	16,581	5,657	22,238	12,304	34,542	-480	-1.4%
2018/19	16,468	5,673	22,141	12,211	34,352	-190	-0.6%
2019/20	16,530	5,731	22,261	12,283	34,544	192	0.6%
2020/21	15,507	5,479	20,986	12,163	33,149	-1,395	-4.0%
2021/22	16,245	5,574	21,819	12,282	34,101	952	2.9%
2022/23	15,982	5,475	21,457	12,356	33,813	-288	-0.8%
2023/24	15,918	5,176	21,094	12,292	33,386	-427	-1.3%
2024/25	15,692	5,137	20,829	12,069	32,898	-488	-1.5%
2025/26	15,565	5,209	20,774	11,607	32,381	-517	-1.6%
2026/27	15,406	5,131	20,537	11,423	31,960	-421	-1.3%
2027/28	15,394	4,913	20,307	11,095	31,402	-558	-1.7%
2028/29	15,439	4,664	20,103	10,916	31,019	-383	-1.2%
2029/30	15,474	4,643	20,117	10,738	30,855	-164	-0.5%
2030/31	15,510	4,642	20,152	10,363	30,515	-340	-1.1%

Source: Applied Economics, 2021.
Bolding indicates actuals.

Enrollment in the 7-8 cohort is expected to fluctuate considerably during the projection period, with losses ranging from 0.5 to 5.5 percent per year. By 2030/31, 7-8 enrollment is projected to total roughly 4,600 students, down 15.3 percent (840 students) compared to 2020/21.

In the coming years, the 9-12 grade cohort will be less affected by new housing additions and any increases are likely to be offset by the advancement of smaller in-coming classes; in addition, recent trends suggest that the effect of alternative providers on high school enrollment will likely be more significant than in the past. After increasing slightly over the next two years, 9-12 enrollment losses are expected to accelerate, averaging 2.4 percent per year between 2024/25 and 2030/31. By 2030/31, 9-12 enrollment is projected to decline by about 1,800 students (or 15 percent), dropping to 10,360 students by the end of the period.

5.0 Sub-District Enrollment Projections

Sub-District enrollment projections are based on the current number of students in each study grid, the expected occupancy of existing housing units and absorption of new housing units, and the expected student generation from existing and newly created households. Expected levels of District-wide absorption are allocated to new residential developments on a project-by-project basis. Absorption is first allocated to active residential projects and then to vacant land planned for residential development, according to the development schedule assigned to each project or project part. Using this data, annual projections of enrollment by grade through 2030/31 for each grid area were developed.

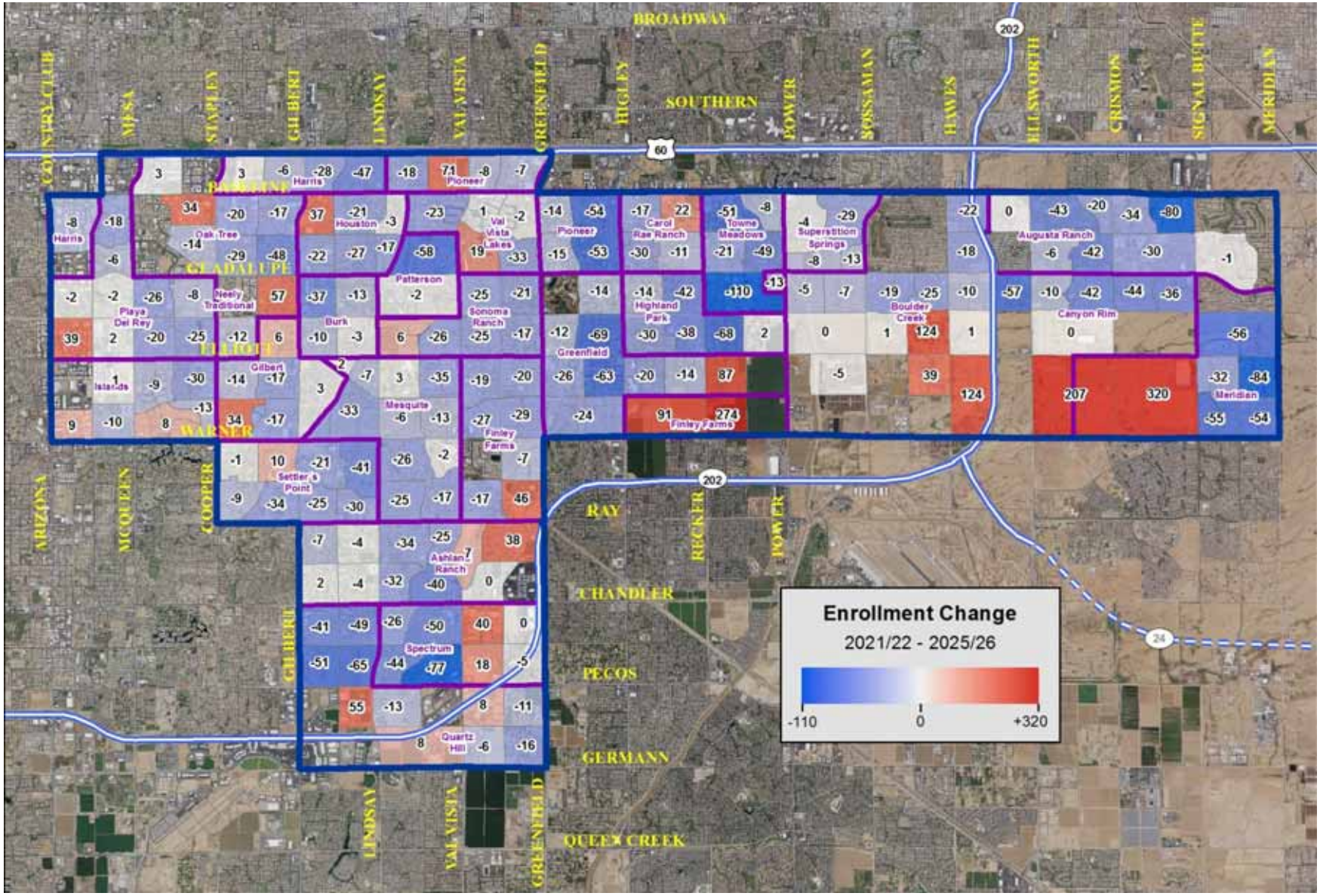
The grid-level projections are then aggregated by attendance area and used to cross-check the District enrollment projections. Matrices showing the relationship between where students live and where they attend school are provided for each elementary, middle and high school attendance area. Finally, these relationships are combined with the attendance area projections to forecast enrollment by school.

5.1 Planning Grid Projections

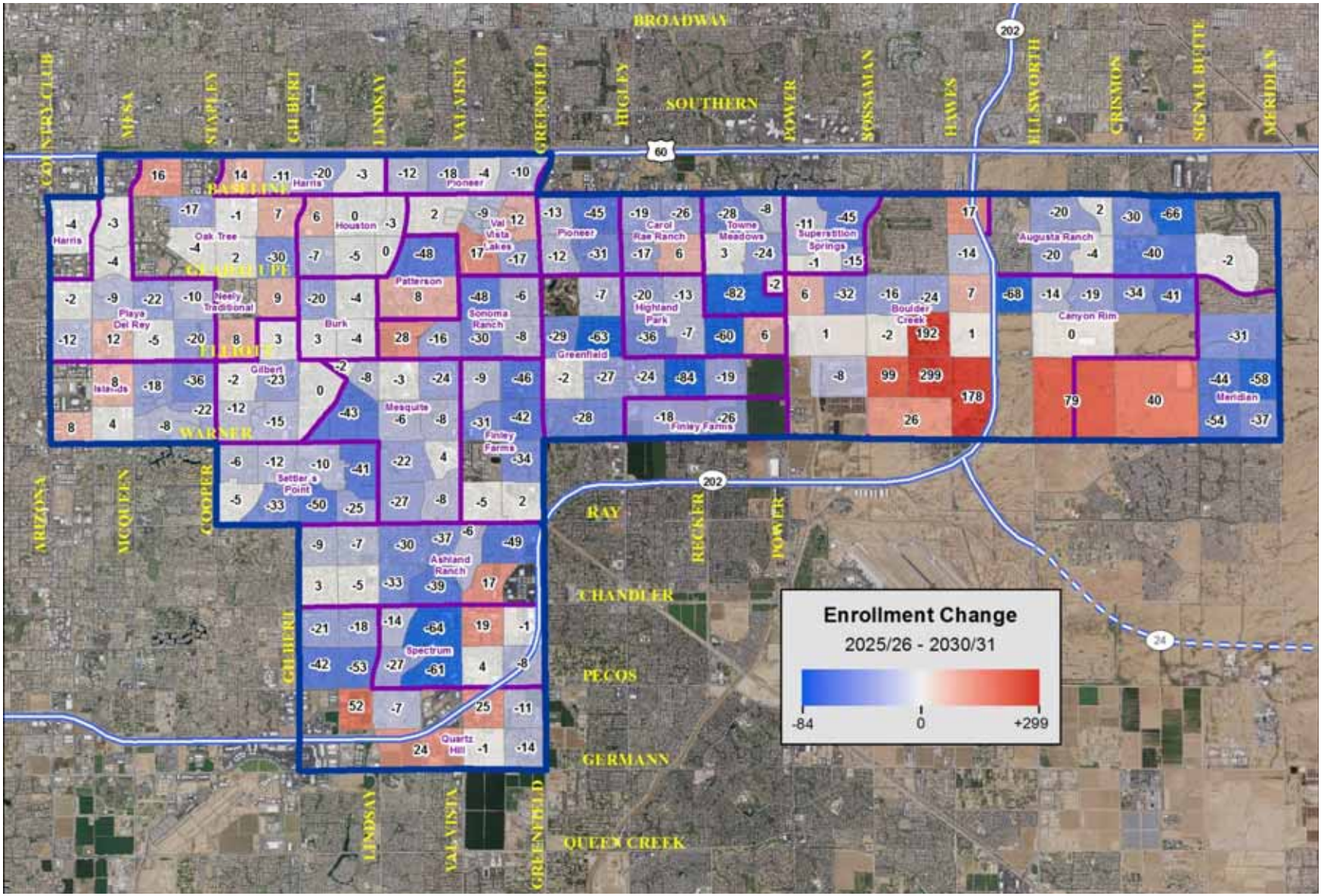
The projected changes in the number of students by grid over the next two five-year periods are depicted on **Maps 10 and 11**. The planning grids are color coded according to the degree of change, with increasing saturations of red for positive change and blue for negative change.

During the first five years of the projection period, concentrations of enrollment growth are generally limited to areas of new development east of Greenfield Road, particularly in Morrison Ranch, Hawes Crossing, and Eastmark. Although there are some pockets of moderate growth scattered throughout the western half of the District, enrollment losses are widespread throughout the District during this period and can be attributed to a combination of factors, including competition from charter schools and the aging of the existing households. During the second five-year period, enrollment losses are expected to intensify and become even more widespread; the growth areas that remain become even more concentrated in the eastern half of the District, following development along Warner Road at Hawes Crossing and Eastmark.

MAP 10
ENROLLMENT CHANGE: 2021/22 - 2025/26



MAP 11
ENROLLMENT CHANGE: 2025/26 - 2030/31



5.2 Attendance Area Projections

Table 14 shows historical elementary enrollment by attendance area, as well as projections through 2030/31 based on the Mid-Point forecast scenario. The enrollment values are color coded relative to the share of total enrollment by year, with higher values in shades of red and lower values in shades of blue. In the annual total columns, the color saturation increases with the degree to which the value is higher or lower than the average for that year. In the change columns, the saturation increases with the value's distance from zero. The change in enrollment for select periods is highlighted in the leftmost columns of the table; the enrollment change that occurred between 2019 and 2020 is shown separately in order to highlight the anomalous effects of the COVID-19 pandemic.

In-District elementary enrollment has been steadily declining, the effects of which have been offset somewhat by recent increases in out-of-District enrollment. Although total K-6 enrollment decreased by more than 1,000 students in 2020/21 due to the pandemic, the majority of the students that were lost are expected to return in 2021/22, resulting in an increase in total K-6 enrollment next year. This one-time increase is almost entirely offset by subsequent in-District enrollment losses, resulting in a nominal increase in elementary enrollment (57 students) by the end of the first five-year period. Total K-6 enrollment is projected to stabilize somewhat during the second half of the projection period, but moderate losses in both in-District and out-of-District students results in a net loss of 55 K-6 students between 2025/26 and 2030/31. As a result, total elementary enrollment in 2030/31 is expected to be nearly identical to 2020/21 enrollment (15,564 K-6 students versus 15,507 K-6 students in 2020/21); however, compared to 2019/20 the District will enroll 1,000 fewer elementary students by the end of the projection period.

During the first half of the projection period, 17 of the 26 elementary attendance areas are projected to experience some degree of enrollment decline. These declines are completely offset by gains in the remaining attendance areas, resulting in a net gain of just 7 in-District K-6 students for the period; the largest enrollment gains are projected in the Boulder Creek (+206 students), Finley Farms (+206 students) and Meridian (+188 students) attendance areas and the largest loss is expected in the Greenfield attendance area (-113 students). In addition, 50 new out-of-District students are expected to be added by 2025/26. In the second half of the projection period, 16 of the 26 attendance areas are expected to decline, although gains in the Boulder Creek attendance area (+361 students) offset most of the losses, resulting in a net loss of just 6 in-District students between 2025/26 and 2030/31. Out-of-District enrollment is also projected to decrease by roughly 50 students during this period, resulting in a total enrollment decrease of 55 K-6 students by 2030/31.

Ten-year enrollment projections for the junior and high school attendance areas are shown on **Table 15**. In-District 7-8 attendance area enrollment is expected to decline by about 760 students over the next ten years; the majority of these losses (72 percent) are expected to occur during the second five-year period and are almost entirely the result of significant declines in in-District enrollment (-540 students). The pandemic did not cause as much of a decline in 7-8 enrollment as it did in K-6 enrollment, so the increase expected next year due to the return of middle school students is not as pronounced. The largest enrollment decline over the 10-year period is expected in the Highland attendance area (-307 students); in addition, the Mesquite and South Valley

attendance areas are projected to lose nearly 200 students each by 2030/31. Out-of-District enrollment is expected to decline slightly in both periods, resulting in a net loss of about 80 out-of-District students over the next 10 years. As a result, total 7-8 enrollment is projected to decrease by about 840 students (15 percent) by the end of the projection period; compared to 2019/20, 7-8 enrollment will decrease by 1,100 students (19 percent) by 2030/31.

Significant enrollment declines are projected for the 10-year period at the high school level, particularly in the second half of the period, due to the loss of in-District students (driven by smaller advancing classes of students and increased competition from alternative providers). Following moderate 9-12 enrollment increases for the next two years, losses of in-District students are expected to accelerate throughout the remainder the projection period in all of the high school attendance areas, resulting in a net loss of 1,770 in-District 9-12 students over the 10-year period. Combined with a nominal decrease in out-of-District enrollment (-30 students), total high school enrollment is projected to decrease by 1,800 students (15 percent) by 2030/31.
The largest enrollment declines are projected in the Highland (-527 students) and Gilbert (-471 students) attendance areas; the Campo Verde and Mesquite high school attendance areas are expected to lose more than 300 9-12 students each.

TABLE 14
ELEMENTARY ENROLLMENT PROJECTIONS BY ATTENDANCE AREA
MID-POINT PROJECTIONS

	Actual													2014-2019	2019-2020	2020-2025	2025-2030
	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2030/31				
Ashland Ranch	668	649	632	674	647	672	645	703	673	665	628	604	558	4	-27	-41	-46
Augusta Ranch	836	831	846	865	821	830	817	819	792	780	746	725	724	-6	-13	-92	-2
Boulder Creek	696	646	712	709	732	724	699	745	750	772	816	905	1,266	28	-25	206	361
Burk	378	404	370	319	312	313	278	299	283	280	280	274	281	-65	-35	-4	7
Canyon Rim	768	729	743	772	705	670	618	689	671	643	602	534	441	-98	-52	-84	-93
Carol Rae Ranch	456	460	473	449	440	426	383	399	397	398	394	388	381	-30	-43	5	-7
Finley Farms	587	601	603	603	624	598	585	697	769	834	827	791	725	11	-13	206	-66
Gilbert	441	429	443	411	410	422	394	432	433	434	427	431	417	-19	-28	37	-14
Greenfield	722	748	826	915	948	1,001	917	947	878	852	818	804	729	279	-84	-113	-75
Harris	461	538	501	497	467	459	386	402	395	395	395	381	382	-2	-73	-5	1
Highland Park	771	735	744	701	674	635	526	547	520	514	494	479	461	-136	-109	-47	-18
Houston	367	352	341	331	328	323	301	317	339	335	333	333	329	-44	-22	32	-4
Islands	490	450	418	416	436	446	382	399	376	361	361	345	343	-44	-64	-37	-2
Meridian	778	734	712	713	655	615	552	558	524	509	605	740	820	-163	-63	188	80
Mesquite	739	754	709	726	711	745	702	716	700	683	667	643	589	6	-43	-59	-54
Oak Tree	689	646	598	595	595	568	543	603	622	640	633	633	630	-121	-25	90	-4
Patterson	347	341	352	364	346	342	322	344	335	316	305	295	303	-5	-20	-27	8
Pioneer	463	441	463	452	494	493	423	424	390	371	391	374	363	30	-70	-49	-11
Playa Del Rey	445	495	428	427	422	411	370	383	378	377	358	349	356	-34	-41	-21	7
Quartz Hill	449	418	370	368	347	317	281	261	231	238	209	196	222	-132	-36	-85	25
Settler´s Point	646	613	586	590	640	618	551	608	597	579	560	542	452	-28	-67	-9	-90
Sonoma Ranch	479	476	434	446	441	434	407	420	398	393	382	369	357	-45	-27	-38	-11
Spectrum	655	638	654	632	595	598	521	597	567	567	543	540	512	-57	-77	19	-28
Superstition Springs	534	525	525	510	501	522	487	525	501	490	469	455	470	-12	-35	-32	15
Towne Meadows	527	564	582	599	555	543	494	504	491	469	451	435	436	16	-49	-59	1
Val Vista Lakes	408	410	412	414	389	395	376	406	397	407	398	402	413	-13	-19	26	12
Out of District	2,737	2,256	2,152	2,083	2,233	2,410	2,547	2,501	2,576	2,615	2,603	2,597	2,548	-327	137	50	-49
Total	17,537	16,883	16,629	16,581	16,468	16,530	15,507	16,245	15,982	15,918	15,691	15,564	15,509	-1,007	-1,023	57	-55

Source: Applied Economics, 2021.

TABLE 15
SECONDARY ENROLLMENT PROJECTIONS BY ATTENDANCE AREA
MID-POINT PROJECTIONS

	Actual													2014-2019	2019-2020	2020-2025	2025-2030
	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2030/31				
JUNIOR HIGH																	
Desert Ridge Junior High	1,169	1,108	1,089	1,061	1,036	968	907	953	903	831	891	941	925	-201	-61	34	-15
Greenfield Junior High	1,019	960	942	956	941	1,013	936	1,036	1,111	1,049	991	1,006	842	-6	-77	70	-164
Highland Junior High	1,000	961	937	926	950	1,006	959	913	854	802	816	802	652	6	-47	-157	-150
Mesquite Junior High	1,337	1,346	1,252	1,288	1,316	1,263	1,199	1,256	1,240	1,180	1,105	1,089	1,003	-74	-64	-110	-86
South Valley Junior High	806	817	778	751	732	735	677	690	680	641	621	626	497	-71	-58	-51	-129
Out of District	860	732	712	675	698	746	801	728	688	674	712	746	723	-114	55	-55	-23
Total	6,191	5,924	5,710	5,657	5,673	5,731	5,479	5,574	5,475	5,176	5,137	5,209	4,642	-460	-252	-270	-567
HIGH SCHOOL																	
Campo Verde High	1,628	1,648	1,664	1,569	1,531	1,546	1,490	1,567	1,549	1,542	1,494	1,388	1,128	-82	-56	-102	-260
Desert Ridge High	2,259	2,293	2,288	2,261	2,244	2,144	2,078	2,110	2,059	2,035	2,011	2,026	1,973	-115	-66	-52	-53
Gilbert High	2,627	2,596	2,494	2,324	2,230	2,175	2,107	2,101	2,098	2,031	2,004	1,917	1,636	-452	-68	-190	-280
Highland High	2,419	2,529	2,526	2,573	2,601	2,655	2,677	2,807	2,873	2,905	2,831	2,665	2,150	236	22	-12	-515
Mesquite High	2,108	2,090	1,953	1,849	1,767	1,669	1,619	1,610	1,655	1,650	1,607	1,539	1,315	-439	-50	-80	-224
Out of District	1,760	1,661	1,758	1,728	1,838	2,094	2,192	2,087	2,122	2,129	2,122	2,072	2,160	334	98	-120	88
Total	12,801	12,817	12,683	12,304	12,211	12,283	12,163	12,282	12,356	12,292	12,069	11,607	10,363	-518	-120	-556	-1,244

Source: Applied Economics, 2021.

5.3 Attendance Area Versus School Enrollment

The variations between enrollment by attendance area and enrollment by school are detailed in **Tables 16 and 17**. These matrix tables show the movement of students between schools, both within and outside the District. Reading the table across shows the number of students attending a school from each attendance area (listed numerically across the top row as defined in the first column) and from outside the District. Reading down the columns details where students living in each attendance area choose to go to school. The number of students attending the school in their designated attendance area is shaded in green. For example, at the elementary level (**Table 16**) there are 428 students attending Ashland Ranch who reside in the Ashland Ranch attendance area, 5 are from the Finley Farms attendance area, 3 from the Gilbert attendance area, 3 from the Greenfield attendance area, and so on.

The number of students attending each school from outside the District is shown, along with the total number of students who attend the school and the total number of District students residing in the attendance area. The Net Difference column is calculated by subtracting the Total Reside from the Total Attendance. Note that the Total Attendance includes students who reside outside of the District, and the Total Reside only includes resident students enrolled in District schools. A school with a positive Net Difference is considered to be "importing" students, whereas a school with a negative Net Difference is considered to be "exporting" students.

Table 16 details the movement of District elementary students between schools, as well as the distribution of students from outside of the District, which contribute to the differences between enrollment by attendance area and enrollment by school. The matrix shows that of the 12,960 resident students attending District elementary schools this year, 61.6 percent attended the school designated by the attendance area in which they reside; Meridian retained the highest share of resident K-6 students (78 percent) and Gilbert had the lowest share (42 percent). Highland Park has the largest net import of students (176), followed closely by Quartz Hill (155). The school with the largest export of K-6 students is Boulder Creek with a net loss of 298 students, despite the addition of 43 out-of-District students; this year, 100 elementary students residing in the Boulder Creek attendance area chose to attend Superstition Springs Elementary and another 124 students enrolled in the Gilbert Global Academy. Mesquite Elementary also lost a substantial number of students (239 students), despite the addition of 48 out-of-District K-6 students. Of the schools with defined attendance areas, Quartz Hill enrolled the largest number of out-of-District students (166 students).

Neely Traditional and Gilbert Global Academy do not have a defined attendance area, but draw students from every other attendance areas, as well as students from outside the District. This year, Gilbert Global Academy attracted 2,216 students from within the District and 520 from outside, making the school by far the largest importer of students from outside the District. It is worth noting that every single school attendance area had a net decrease of resident students this past year, with the Highland Park attendance area losing the most (-109 students), and Augusta Ranch and Finley Farms losing the least (-13 students each).

The movement of District middle and high school students between area of residence and school of attendance is summarized in **Table 17**. At the middle school level, 66.9 percent of resident students attended their designated school. Of the schools with defined attendance areas, South Valley Junior High School had the highest net import of students (77). Of Highland Junior High's 959 resident students, only 77.1 percent choose to attend the school, although a portion of this loss was offset by the enrollment of more than 100 out-of-District students. With only 49.2 percent of Mesquite's resident students choosing to attend the school, Mesquite Junior High had the largest net export of students this year (508 students). Gilbert Global Academy enrolled the largest number of out-of-District students among the junior high schools (194 students), followed closely by Desert Ridge with 170 out-of-District students. Similar to the elementary schools, all of the junior high schools lost resident students over this past year.

Of the District's 9,971 resident high school students, 7,032 (70.5 percent) attended the school associated with their attendance area. Highland High School had the largest net enrollment gain (310 students) among high schools with defined attendance areas, due entirely to the addition of 385 out-of-District students; it is also the only school across all grade levels to have a net increase, though modest, of resident students from last year (22 students). Mesquite had a net enrollment loss of 435 students this year, despite enrolling 222 out-of-District students. Gilbert Global Academy enrolled 1,616 students, 341 of which came from outside the District.

In total, the District enrolled 5,540 K-12 students from outside of the District's boundaries this year, which represents 16.7 percent of the District's total 2020/21 enrollment. Across all of the grade levels, 65.7 percent of resident students chose to attend the school associated with their attendance area of residence in 2020/21; this ratio declined significantly compared to 2019/20 (78.8 percent) due to the enrollment shifts that were brought about the COVID-19 pandemic this year.

TABLE 16
SCHOOL VERSUS ATTENDANCE AREA ENROLLMENT (K-6th GRADE): 2020/21

		Attendance Area																															
School		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	Out of District	Total Attendance	Total Reside	Net Difference	Reside 2019/20	Reside Change	Percent
Ashland Ranch	1	428						5	3	3	1			3	2	17	3			1	8	10		6				71	561	645	-84	672	-27	-4.0%
Augusta Ranch	2	1	570	21		31						2		1	10										2	2		110	750	817	-67	830	-13	-1.6%
Boulder Creek	3		13	309		17				1		3			5	1				1				1	4	3		43	401	699	-298	724	-25	-3.5%
Burk	4	1	2		126		1	1	10		11	1	8	4		2	11	3		4	1	2	2			2	3	43	238	278	-40	313	-35	-11.2%
Canyon Rim	5		34	26		408	2					1			15	1									1			97	585	618	-33	670	-52	-7.8%
Carol Rae Ranch	6	4	3	20		1	256	3	1	6	2	8		1		1			11					2	8	30		51	408	383	25	426	-43	-10.1%
Finley Farms	7	4		4	1	1		359	2	8	1	4			1	10	3		1		1	7	4	3		2	4	69	489	585	-96	598	-13	-2.2%
Gilbert	8	4		2	24	2	2	9	164	2	14	2	11	5		18	21	3	5	7	1	9	4	2		2	1	82	396	394	2	422	-28	-6.6%
Greenfield	9	2	3	4	2		1	27	5	678	2	2			3	4		1	8		2	1	9		1	1	6	69	831	917	-86	1,001	-84	-8.4%
Harris	10		3	2	1		2		6		200		3	1			2	1		2				1			1	88	313	386	-73	459	-73	-15.9%
Highland Park	11	7	1	26		5	9	22	1	61		399	2		3	2	5	1	13			1	10	1	6	20	3	104	702	526	176	635	-109	-17.2%
Houston	12			3	1				3		15		155			2	2		2	3		4	1	1	2			44	238	301	-63	323	-22	-6.8%
Islands	13			1	1				10		8		2	250		4	3	1		22		14		1	2		2	116	437	382	55	446	-64	-14.3%
Meridian	14		10	6		36	2	3			1	1			429			1							2	1		83	575	552	23	615	-63	-10.2%
Mesquite	15	3			2		2	4	9	2		1	1			360	5		1	1	5	1	8	5	1	2	2	48	463	702	-239	745	-43	-5.8%
Oak Tree	16			2	4				10		6		3	3		2	239	3	4	6		4	5			2	2	49	344	543	-199	568	-25	-4.4%
Patterson	17	6	1	5	17	6	3	3	10	2	9	2	29	2		10	18	211	8	4			18	1	2	4	13	71	455	322	133	342	-20	-5.8%
Pioneer	18	7	3	3	1		9	2		2	2	3			7	3		2	235		1	3	1	3	3	2	2	76	370	423	-53	493	-70	-14.2%
Playa Del Rey	19	3			4	1			11		12		3	8	2	1	18	3	2	206		8	1	4			2	50	339	370	-31	411	-41	-10.0%
Quartz Hill	20	7		4				5	1			2		1		6					201	4	3	34	1	1		166	436	281	155	317	-36	-11.4%
Settler's Point	21	14	2		2	1	1	5	13	1	3	1	2	3	1	28		3		2		332	2		1			51	468	551	-83	618	-67	-10.8%
Sonoma Ranch	22	2		2	3	1		5	1	5	5	1	3	1		18	4	9	6	3	1	2	245	9	2	4	5	40	377	407	-30	434	-27	-6.2%
Spectrum	23	7	2	1		3		2			1		1	1		12	5	2		2	3	7	1	290			3	65	408	521	-113	598	-77	-12.9%
Superstition Springs	24		9	100	1	10	5	1		5	2	5			2	1							1		353	17	1	82	595	487	108	522	-35	-6.7%
Towne Meadows	25	7	8	21	2	8	11	7	2	11	2	17	1	2	4		2	4	7	2	4	1	5	2	19	325	2	111	587	494	93	543	-49	-9.0%
Val Vista Lakes	26		3	2	8	3	1	4	6	1	12	1	13			7	6	17	13			2	4	3	2	5	257	59	429	376	53	395	-19	-4.8%
Neely Traditional		12	1	8	13	4	6	24	53	15	12	11	25	18	2	36	83	7	13	38	14	16	11	9	6	10	11	88	546	0	546	0	0	
Gilbert Global Academy		126	146	124	65	80	70	91	72	114	63	59	38	77	64	151	112	49	94	63	39	123	71	141	69	59	56	520	2,736			0	0	
Other		0	3	3	0	0	0	3	1	0	2	0	1	1	2	5	1	1	0	3	0	0	1	2	0	0	0	1	30	0	30	0	0	
Total Reside		645	817	699	278	618	383	585	394	917	386	526	301	382	552	702	543	322	423	370	281	551	407	521	487	494	376	2,547	15,507	12,960	2,547	14,120	-1,160	-8.2%
Reside/Atttend Same		66%	70%	44%	45%	66%	67%	61%	42%	74%	52%	76%	51%	65%	78%	51%	44%	66%	56%	56%	72%	60%	60%	56%	72%	66%	68%			7,985	61.6%			

Sources: Gilbert Public Schools; Applied Economics, 2020.

TABLE 17
SCHOOL VERSUS ATTENDANCE AREA ENROLLMENT (7th-12th GRADE): 2020/21

MIDDLE SCHOOL

School		Attendance Area 1	2	3	4	5	Out of District	Total Attendance	Total Reside	Net Difference	Reside 2019/20	Reside Change	Percent
Desert Ridge Junior High School	1	676	2	8	3	1	170	860	907	-47	968	-61	-6.3%
Greenfield Junior High School	2	12	644	37	120	7	100	920	936	-16	1,013	-77	-7.6%
Highland Junior High School	3	68	73	739	16	4	104	1,004	959	45	1,006	-47	-4.7%
Mesquite Junior High School	4	3	13	4	590	10	71	691	1,199	-508	1,263	-64	-5.1%
South Valley Junior High School	5	1	23	5	136	481	108	754	677	77	735	-58	-7.9%
Gilbert Classical Academy		10	23	17	78	19	44	191	0	191	0		
Gilbert Global Academy		129	150	146	240	146	194	1,005	0	1,005	0		
Other		8	8	3	16	9	10	54	0	54	0		
Total Reside		907	936	959	1,199	677	801	5,479	4,678	801	4,985	-307	-6.2%
Reside/Atttend Same (In-District)		74.5%	68.8%	77.1%	49.2%	71.0%		3,130	66.9%				

HIGH SCHOOL

School		Attendance Area 1	2	3	4	5	Out of District	Total Attendance	Total Reside	Net Difference	Reside 2019/20	Reside Change	Percent
Campo Verde High School	1	1,137	7	46	24	218	338	1,770	1,490	280	1,546	-56	-3.6%
Desert Ridge High School	2	5	1,617	5	50	3	514	2,194	2,078	116	2,144	-66	-3.1%
Gilbert High School	3	63	16	1,294	93	141	276	1,883	2,107	-224	2,175	-68	-3.1%
Highland High School	4	11	144	301	2,118	28	385	2,987	2,677	310	2,655	22	0.8%
Mesquite High School	5	25	1	63	7	866	222	1,184	1,619	-435	1,669	-50	-3.0%
Gilbert Classical Academy		27	8	82	58	46	83	304	0	304	0		
Gilbert Global Academy		203	243	271	275	283	341	1,616	0	1,616	0		
Other		19	42	45	52	34	33	225	0	225	0		
Total Reside		1,490	2,078	2,107	2,677	1,619	2,192	12,163	9,971	2,192	10,189	-218	-2.1%
Reside/Atttend Same (In-District)		76.3%	77.8%	61.4%	79.1%	53.5%		7,032	70.5%				

In-District Students (K-12)		Reside/Atttend Same (In-District)	18,147	65.7%	27,609

Sources: Gilbert Public Schools, 2020; Applied Economics, 2021.

5.3 Enrollment by School

The observed trends in school enrollment versus attendance area enrollment for the past five years are used to create projections of enrollment by school. While intra-District movement patterns tend to hold steady for several years, the potential for new alternative providers, special programs, and a host of other factors can cause these relationships to shift over time. Therefore, the projections by school for the long-term, 5 to 10 years into the future should be used with caution. The projections of enrollment by school provided in **Tables 18 and 19** reflect the same pattern of change as the attendance areas, therefore no further description of these results is provided.

TABLE 18
ELEMENTARY ENROLLMENT BY SCHOOL

	Actual													2014-2019	2019-2020	2020-2025	2025-2030
	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2030/31				
SCHOOLS *																	
Ashland Ranch	752	735	732	787	787	768	561	735	721	708	677	655	613	16	-207	94	-42
Augusta Ranch	997	936	942	980	948	947	750	904	890	878	836	828	780	-50	-197	78	-48
Boulder Creek	648	622	635	574	556	532	401	515	488	503	539	614	1,004	-116	-131	213	390
Burk	447	426	394	344	355	349	238	326	309	312	311	314	317	-98	-111	76	3
Canyon Rim	888	794	777	781	779	746	585	793	791	765	727	644	429	-142	-161	59	-215
Carol Rae Ranch	570	556	581	527	531	506	408	526	545	558	570	569	572	-64	-98	161	2
Finley Farms	745	711	682	649	662	642	489	700	777	843	824	782	685	-103	-153	293	-97
Gilbert	572	534	511	496	480	514	396	536	550	559	574	582	580	-58	-118	186	-1
Greenfield	688	749	804	918	959	1,028	831	1,020	967	953	924	915	864	340	-197	84	-51
Harris	462	467	440	444	428	444	313	399	390	388	385	375	385	-18	-131	62	11
Highland Park	895	858	885	865	856	840	702	859	840	832	809	778	733	-55	-138	76	-45
Houston	440	407	386	348	336	332	238	289	306	313	302	300	293	-108	-94	62	-8
Islands	597	555	498	509	538	571	437	534	524	516	520	515	498	-26	-134	78	-18
Meridian	966	846	829	799	730	683	575	697	675	676	767	912	965	-283	-108	337	54
Mesquite	599	612	561	578	578	590	463	564	543	514	496	478	437	-9	-127	15	-41
Neely Traditional	814	810	762	783	802	780	546	728	721	717	707	707	755	-34	-234	161	47
Oak Tree	657	608	541	535	499	470	344	461	462	464	445	439	493	-187	-126	95	54
Patterson	569	564	550	561	565	591	455	550	538	522	503	492	484	22	-136	37	-8
Pioneer	501	497	527	508	534	541	370	482	453	449	480	451	452	40	-171	81	1
Playa Del Rey	485	491	460	433	421	440	339	422	407	398	383	372	356	-45	-101	33	-16
Quartz Hill	709	658	620	645	639	575	436	518	517	546	544	554	593	-134	-139	118	38
Settler´s Point	608	574	586	579	625	609	468	618	600	584	554	537	457	1	-141	69	-80
Sonoma Ranch	480	452	427	438	440	458	377	473	445	433	402	373	372	-22	-81	-4	-1
Spectrum	670	618	623	578	580	618	408	580	576	583	573	585	582	-52	-210	177	-2
Superstition Springs	653	641	670	696	700	740	595	753	732	723	709	691	676	87	-145	96	-15
Towne Meadows	615	643	677	688	622	668	587	694	657	624	596	576	590	53	-81	-11	15
Val Vista Lakes	502	504	520	515	497	518	429	541	529	526	506	496	511	16	-89	67	15
Other	8	15	9	23	21	30	2,766	31	30	30	29	30	32	22	2,736	-2,736	2
Total	17,537	16,883	16,629	16,581	16,468	16,530	15,507	16,245	15,982	15,918	15,692	15,564	15,509	-1,007	-1,023	57	-55

Source: Applied Economics, 2021.

* Based on the current and projected differences between attendance area and school enrollment.

TABLE 19
SECONDARY ENROLLMENT BY SCHOOL

	Actual													2014-2019	2019-2020	2020-2025	2025-2030
	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2030/31				
JUNIOR HIGH*																	
Desert Ridge Junior High	1,374	1,288	1,296	1,242	1,182	1,100	860	1,059	1,010	929	947	990	944	-274	-240	130	-46
Gilbert Junior High	535	506	444	0	0	0	0	0	0	0	0	0	0	-535	0	0	0
Greenfield Junior High	915	834	855	911	900	1,056	920	1,184	1,146	1,069	1,041	1,031	826	141	-136	111	-205
Highland Junior High	1,265	1,232	1,208	1,221	1,269	1,279	1,004	1,202	1,180	1,124	1,129	1,154	1,061	14	-275	150	-94
Mesquite Junior High	711	661	607	995	969	924	691	936	926	877	859	867	747	213	-233	176	-121
South Valley Junior High	1,192	1,156	1,075	1,022	1,047	1,026	754	918	913	868	847	852	750	-166	-272	98	-102
Gilbert Classical Academy	189	224	217	241	271	295	191	233	258	268	273	273	273	106	-104	82	0
Other	10	23	8	25	35	51	1,059	42	42	42	42	42	42	41	1,008	-1,017	0
Total	6,191	5,924	5,710	5,657	5,673	5,731	5,479	5,574	5,475	5,176	5,137	5,209	4,642	-460	-252	-270	-567
HIGH SCHOOL*																	
Campo Verde High	2,071	2,053	2,109	2,042	2,059	2,119	1,770	2,102	2,117	2,110	2,068	1,963	1,772	48	-349	193	-192
Desert Ridge High	2,659	2,727	2,824	2,839	2,832	2,617	2,194	2,508	2,424	2,415	2,374	2,374	2,321	-42	-423	180	-53
Gilbert High	2,416	2,385	2,317	2,157	2,130	2,153	1,883	2,215	2,241	2,174	2,185	2,083	1,802	-263	-270	200	-281
Highland High	3,022	3,053	3,053	3,150	3,143	3,341	2,987	3,554	3,604	3,557	3,419	3,232	2,716	319	-354	245	-516
Mesquite High	1,977	1,900	1,862	1,701	1,546	1,505	1,184	1,390	1,442	1,468	1,438	1,367	1,163	-472	-321	183	-204
Gilbert Classical Academy	274	292	314	315	335	385	304	337	351	391	406	406	406	111	-81	102	0
Other	382	407	204	100	166	163	1,841	176	176	177	178	180	183	-219	1,678	-1,661	3
Total	12,801	12,817	12,683	12,304	12,211	12,282	12,163	12,282	12,356	12,291	12,068	11,606	10,362	-518	-120	-557	-1,244

Source: Applied Economics, 2021.

* Based on the current and projected differences between attendance area and school enrollment.

Acknowledgements

We would like to acknowledge the people and organizations that have provided information for this study. Their time and expertise are valued assets working in support of Arizona's public schools.

Stephanie Bubenheim
Senior Planner
Town of Gilbert

Jeff Gunderson
Senior Vice President of Land Development
Lennar Homes

Jill Kusy Hegardt
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DMB Associates, Inc

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