APPLIED ECONOMICS

GILBERT UNIFIED SCHOOL DISTRICT DEMOGRAPHIC AND ENROLLMENT ANALYSIS 2019/20

DRAFT REPORT

PREPARED FOR:
GILBERT UNIFIED SCHOOL DISTRICT
140 SOUTH GILBERT ROAD
GILBERT, AZ 85296

MAY 29, 2020

Economic & Fiscal Impact | Demographic Analysis | Economic Development

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Executive Summary

The Demographic and Enrollment Analysis update for the Gilbert Unified School District (District) incorporates information on enrollment, demographic trends, housing occupancy rates, household characteristics and residential development into 10-year projections of enrollment. In addition to the District-wide enrollment forecasts, projections are developed for small-area planning geographies, referred to as “grids”, that are generally a quarter of a square mile in developed and developing areas, and sometimes larger in the periphery. The grids divide the District into 224 sub-areas that are consistent with current school attendance areas and provide sufficient detail to support facility and attendance area planning activities.

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

- These projections are being prepared amid the early months of the COVID-19 pandemic. While there will certainly be some level of long-term economic and demographic impacts associated with this event, it is simply too early to predict what those specific quantitative impacts might be and how they will affect District enrollment. Currently, we expect that Fall 2020/21 District enrollment levels will not be significantly impacted since short-term demographic changes will be minimal and any new housing impacting enrollment for next year is already under construction. The bigger enrollment impacts may be felt in 2021/22 due to the recession that will likely result from the economic impacts of the COVID-19 pandemic; however, such a recession may still be relatively minor in metropolitan Phoenix

- Total K-12 enrollment in the District was 34,544 in the fall of the 2019/20 school year, representing a slight increase of nearly 200 students (0.6 percent) over the previous year. This enrollment was the result of a 480-student increase in out-of-District enrollment, which was partially offset by a 290-student decline in in-District enrollment. The decrease in enrollment over the past five years was largely due to a drop in in-District enrollment, which has declined by nearly six percent (1,800 students) since 2014/15; out-of-District enrollment, which currently accounts for about 15 percent of total District enrollment, declined by just three percent (150 students) during the same time period but has increased the last two years which has offset the in-District losses.

- Of the 5,250 out-of-District students that were enrolled in 2019/20, 60 percent came from Mesa Unified School District and the Higley Unified School District. Compared to 2018/19, the number of out-of-District students enrolled in the District increased by 481 students this year due to strong gains in the number of students that were attracted from both the Mesa Unified School District and the Chandler Unified School District. This year the strongest annual out-of-District enrollment increases occurred in the 11th and 12th grades. Overall, out-of-District enrollment growth in the four high school grades accounted for the majority (53 percent) of the annual increase in total out-of-District enrollment.

- Between 2000 and 2019, 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 2019. Meanwhile, the population aged 45 to 64 years has grown significantly, increasing from about 17 percent to 25 percent; this growth has fueled the increase in enrollment at the high school level during the same period. Between 2010 and 2019, 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. In 2000 there were over 3 persons per household on average in the District, a reflection of the young families that moved into new subdivisions at the edge of the metropolitan region. By 2019 the population per household fell to 2.75 persons as the District matured and new, entry-level housing became more limited in the District.

- There are 15 charter schools operating within the District and 25 charter schools within one mile of District boundaries; combined, these schools serve nearly 19,900 students. Enrollment in grades K-8 comprises the vast majority (80 percent) of the 19,900 charter students in the area; this is down from a share of roughly 85 percent that had persisted for several years. In just the past three years, nearby charter enrollment has increased by 38 percent (3,400 students), while in-District charter enrollment increased by 13 percent (850 students) during the same period. In both cases, the share of 9-12 students has steadily increased since 2016/17; high school students now account for nearly 20 percent of total local charter enrollment (up from 14 percent three years ago).

- While 0.585 school-age persons are being generated per household, the District only enrolls 0.397 students per household, resulting in an E-P ratio of 0.800, or 80 percent in 2019/20. The net difference between the school-age population and total District enrollment includes the loss of some 13,900 in-District school-age persons to other providers and the gain of nearly 5,300 students at District schools from outside of the District. In the past 19 years, the District's net E-P ratio has fallen by more than 14 percent (from .934 to .801), or roughly 0.61 percent per year. However, the rate has been steady the last two years due to large increases in the number of students from outside the District.

- The continued decline in school-age population per household is expected to result in a net gain of only 580 school-age persons during the 10-year period. When the projected school-age population is combined with the District's falling E-P ratio, a loss of about 3,400 students is projected by 2029/30 (roughly 10 percent of 2019/20 enrollment), yielding total enrollment of 31,160 K-12 students.

- By 2024/25, 19 of the 26 elementary attendance areas are projected to experience some degree of enrollment decline; these losses are somewhat offset by gains in the remaining attendance areas, particularly the Finley Farms (+254 students) attendance area, resulting in a net loss of 190 in-District students for the period; with the addition of roughly 270 new out-of-District students, total enrollment is projected to increase by about 80 students by 2024/25. In the second five-year period, all but two attendance areas are expected to decline, resulting in a loss of 750 in-District students for the period; the only gains during this period are in the Boulder Creek (+320 students) and Meridian (+85 students) attendance areas. Out-of-District enrollment is also projected to decrease by roughly 100 students, resulting in a net decrease of another 850 K-6 students by 2029/30.

- Over the first five years all of the junior high attendance areas are projected see enrollment declines. Including a slight decline in out-of-District enrollment, enrollment is expected to drop by about 750 students by 2024/25. In the second half of the projection period, enrollment losses are projected to moderate somewhat; an enrollment increase in the Desert Ridge Junior High attendance area (+80 students) and slight increase in out-of-District enrollment is projected to partially offset losses in the remaining attendance, resulting in a net decrease of another 260 students for the period.

- During the first five-year period, an enrollment increase in the Highland High School (+70 students) attendance area is expected to partially offset losses in the remaining attendance areas; the largest loss this period is projected for the Gilbert attendance area (-220 students). The projected in-District enrollment losses combine with a 50-student decrease in out-of-District enrollment to yield a net loss of 560 students by 2024/25. During the second half of the projection period, out-of-District enrollment is expected to increase slightly (70 students), but in-District 9-12 enrollment losses accelerate; only the Desert Ridge attendance area is projected to see a gain of about 110 students. The largest decrease during the second five-year period is forecast for the Highland (430 students) attendance area. A net loss of 1,120 in-District students combined with the increase in out-of-District enrollment results in a net loss of an additional 1,050 high school students during the second half of the projection period.

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.

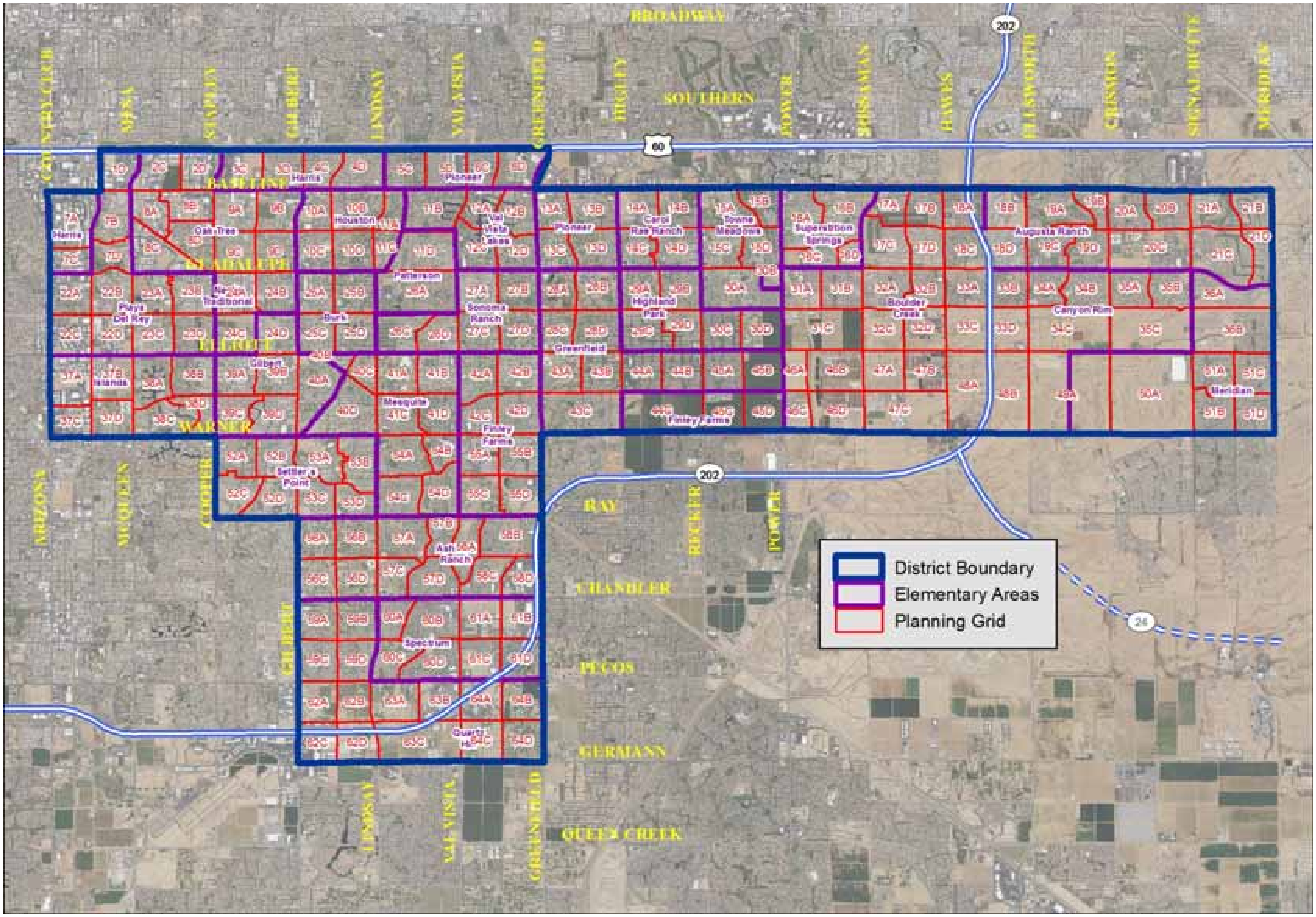
Section 5, Sub-District Projections, describes the anticipated change in enrollment within the District based on many factors, including additions to housing inventory, occupancy rates and population per household trends. These projections are created by combining the grid location of current students 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.

SPECIAL NOTE

These projections are being prepared amid the early weeks of the COVID-19 pandemic. While there will certainly be some level of long-term economic and demographic impacts associated with this event, it is simply too early to predict what those specific quantitative impacts might be and how they will affect District enrollment. Currently, we expect that Fall 2020/21 District enrollment levels will not be significantly impacted by COVID-19 since short-term demographic changes will be minimal and any new housing impacting enrollment for next year is already under construction. However, Fall 2020/21 enrollment will likely be down significantly as a large new charter school opens in the District. The bigger enrollment impacts from COVID-19 may be felt in 2021/22 due to the recession that will likely result from the economic impacts of the pandemic; such a recession may still be relatively minor in metropolitan Phoenix given the strong position of growth and shortage of new housing that prevailed in the area prior to the outbreak. We plan to provide more direction to our clients on this topic in the form of on-line forums as events unfold.

MAP 1
DISTRICT SMALL-AREA PLANNING GEOGRAPHY



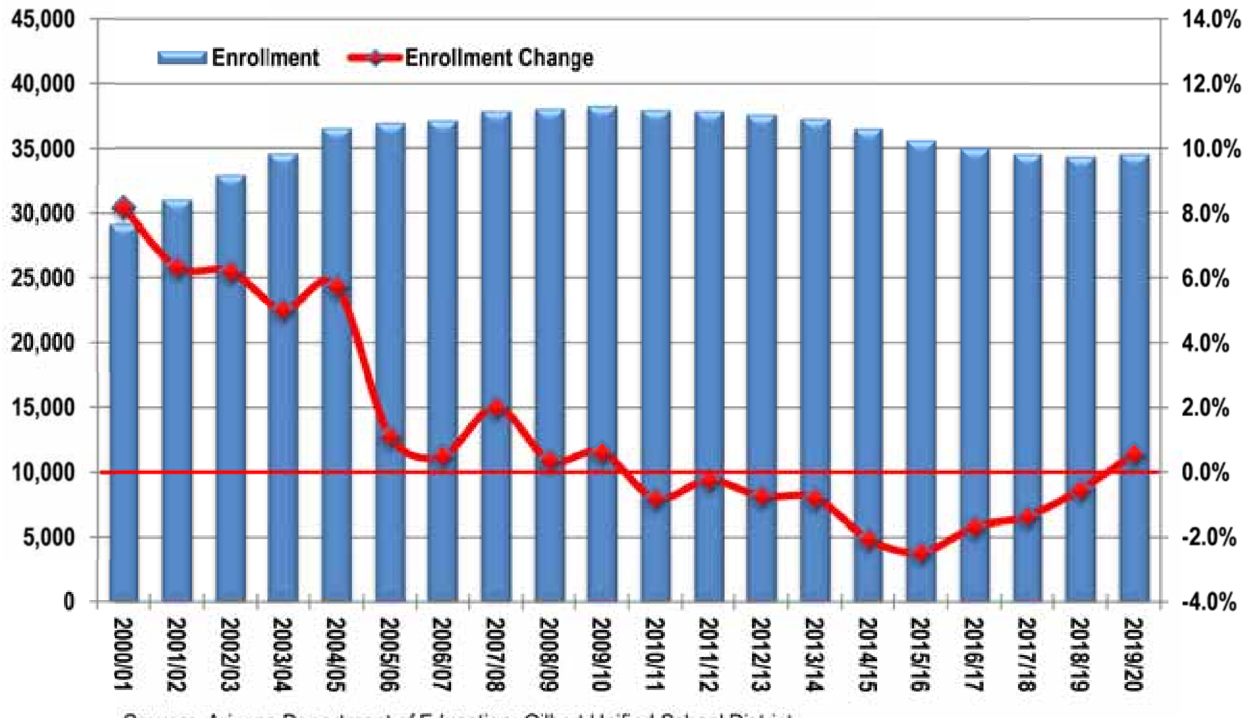
2.0 EXISTING CONDITIONS

2.1 DISTRICT ENROLLMENT

Total Kindergarten through 12th grade (K-12) enrollment in the District was 34,544 in the fall of the 2019/20 school year, representing a slight increase of nearly 200 students (0.6 percent) over the previous year. This is the first enrollment increase that the District has experienced in 10 years, and it was the result of a 480-student increase (10.1 percent) in out-of-District enrollment, which was partially offset by a 290-student decline (1.0 percent) in in-District enrollment.

As illustrated by **Figure 1**, the District experienced substantial growth in the early 2000s, 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.

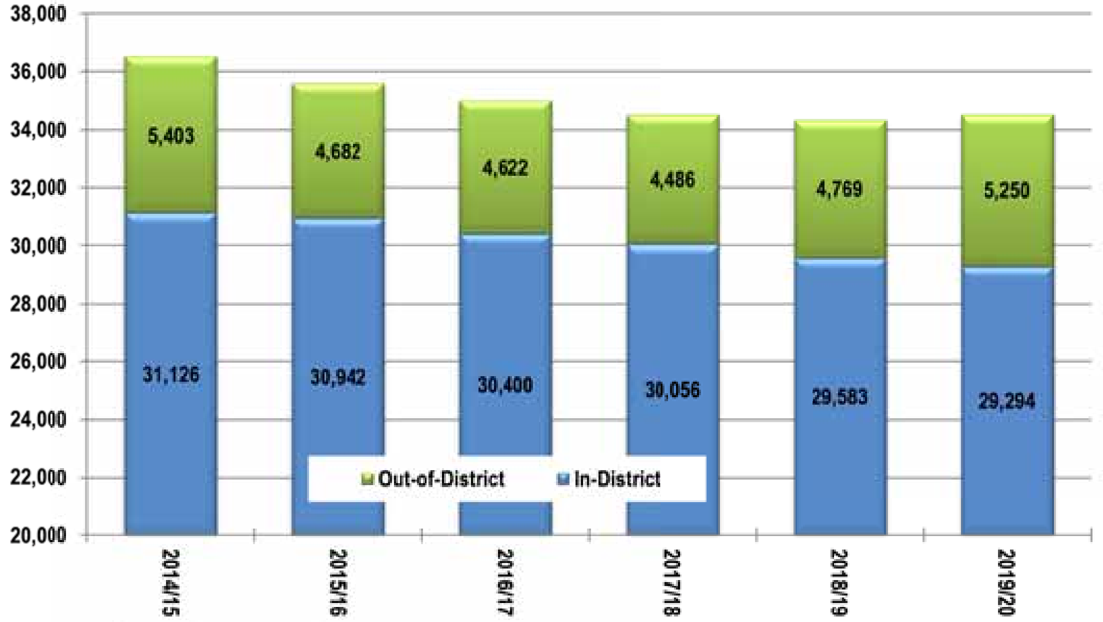
FIGURE 1
DISTRICT ENROLLMENT AND RATE OF CHANGE: 2000/01 – 2019/20



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

As illustrated in **Figure 2,** the decrease in enrollment over the past five years was largely due to a drop in in-District enrollment, which has declined by nearly six percent (1,800 students) since 2014/15; out-of-District enrollment, which currently accounts for about 15 percent of total District enrollment (5,250 students), declined by just three percent (150 students) during the same time period but has increased the last two years which has offset the in-District losses.

FIGURE 2
SOURCE OF DISTRICT ENROLLMENT: 2014/15 – 2019/20



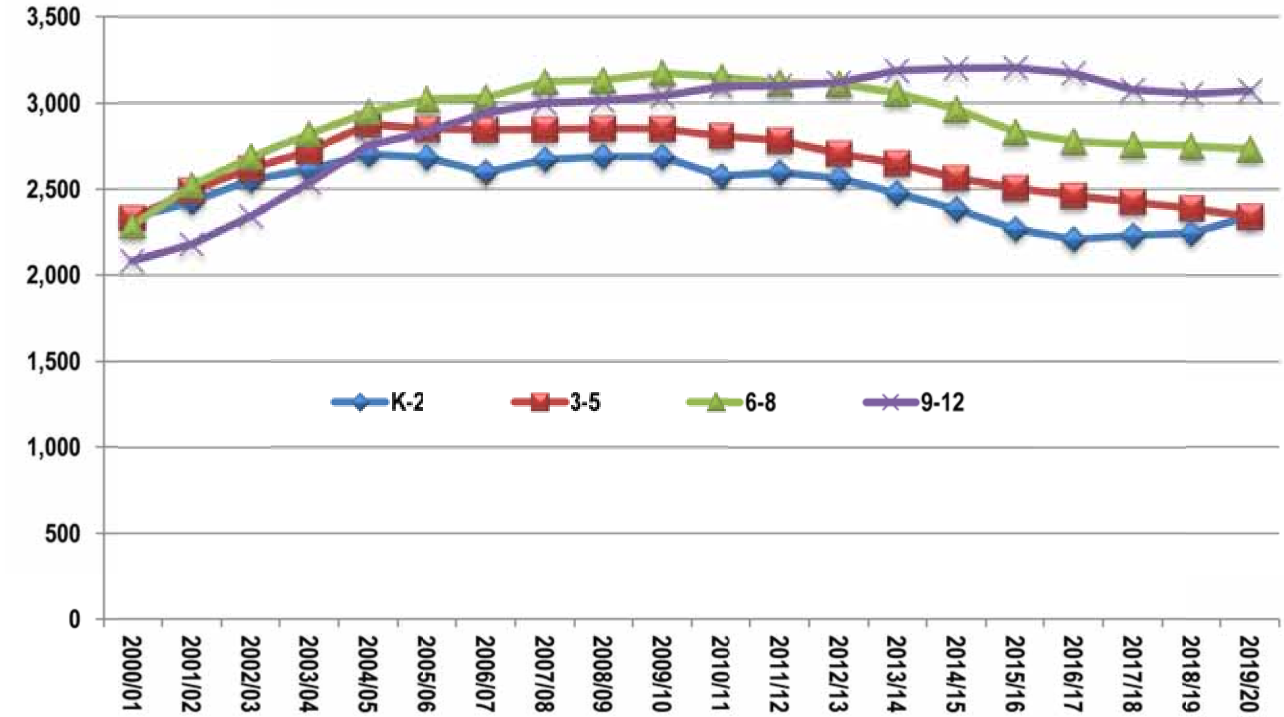
Sources: Gilbert Unified School District; Applied Economics.

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, the K-2, 3-5 and 6-8 cohorts began to level off, while the 9-12 cohort continued to grow due to the aging of the younger families that 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. For the first time since 2015/16, per-grade 9-12 enrollment increased slightly (0.6 percent) this year. Only the K-2 cohort has experienced increases in average enrollment in each of the last three years; the growth this year was more substantial, as average enrollment per grade in the K-2 cohort increased by nearly five percent (100 students per grade) over 2018/19. With nearly 3,100 students per grade, the 9-12 remains the largest of the cohorts, followed by the 6-8 cohort (2,700 students per grade); due to continued declines in 3-5 enrollment, the youngest cohorts are now virtually the same size, with approximately 2,300 students per grade in each cohort.

FIGURE 3
AVERAGE ENROLLMENT PER GRADE BY GRADE COHORT: 2000/01 – 2019/20



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.

Table 1, shows the source of out-of-District enrollment by grade for the current school year. In all, the 5,250 out-of-District students that were enrolled in 2019/20 came from more than 15 metro area school districts. However, 60 percent of those out-of-District students came from Mesa Unified School District (38 percent or roughly 2,000 K-12 students) and Higley Unified School District (22 percent or more than 1,100 K-12 students).

Compared to 2018/19, the number of out-of-District students enrolled in the District increased by 481 students this year. This increase was largely due to strong gains in the number of students that were attracted from both the Mesa Unified School District (+249 students) and the Chandler Unified School District (+128 students); in addition, the number of students that enrolled in the District from the Apache Junction Unified School District this year (291 K-12 students) was 30 percent (66 students) higher than 2018/19. As expected, out-of-District enrollment increases are stronger in Kindergarten, 7th and 9th grade, when students are most likely to transition from one school to another; however, this year the strongest annual out-of-District enrollment increases occurred in the 11th and 12th grades, which is quite surprising given that most students do not change schools so close to the end of high school. Overall, out-of-District enrollment growth in the four high school grades accounted for the majority (53 percent) of the annual increase in total out-of-District enrollment.

MAP 2
GEOGRAPHIC DISTRIBUTION OF STUDENTS ENROLLED IN DISTRICT SCHOOLS

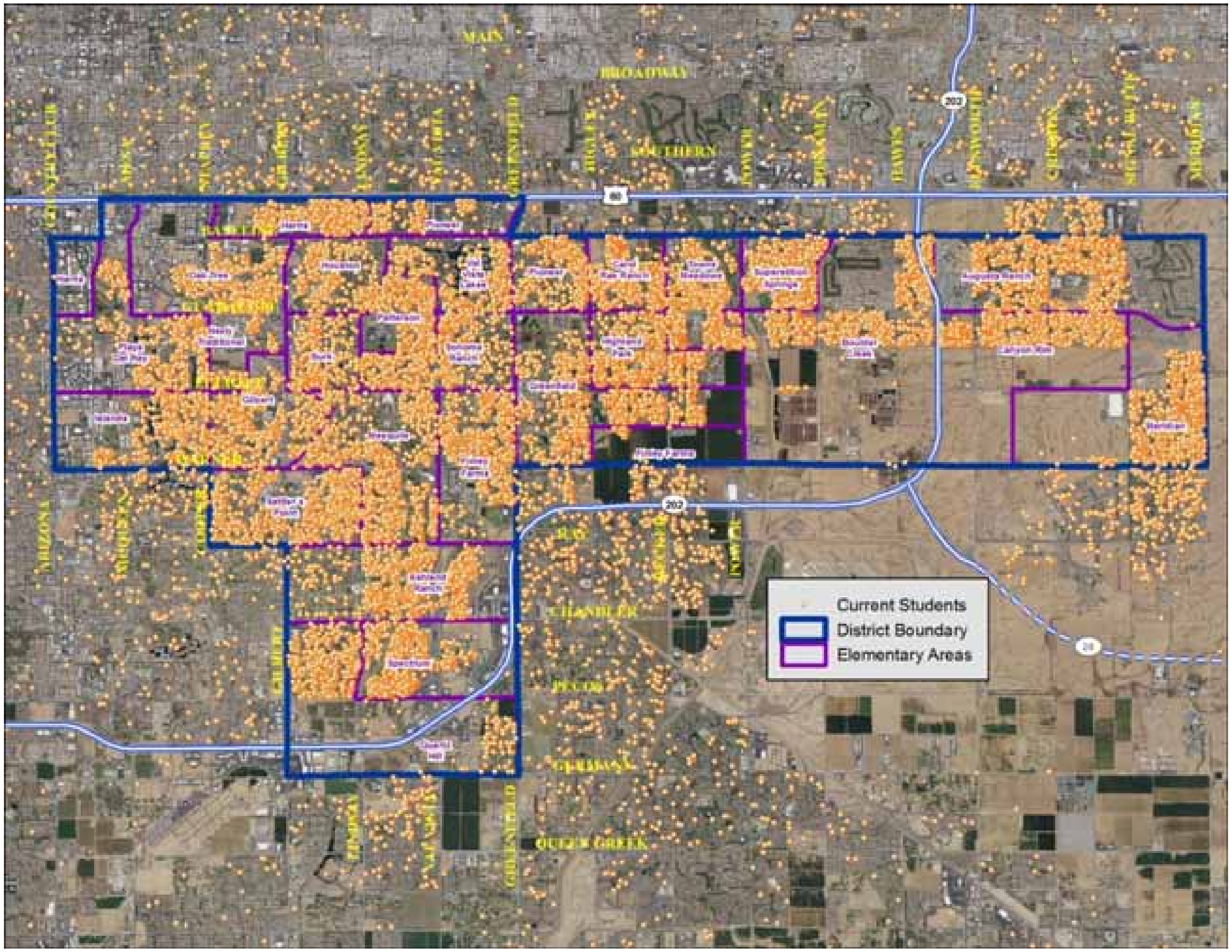


TABLE 1
SOURCE OF OUT-OF-DISTRICT ENROLLMENT BY GRADE: 2019/20

	Enrollment by Grade													
District	KG	1	2	3	4	5	6	7	8	9	10	11	12	Total
Mesa Unified District	173	182	144	129	127	121	119	160	150	182	182	160	192	2,021
Higley Unified District	77	65	79	80	81	93	73	84	77	110	85	116	122	1,142
Chandler Unified District	62	48	54	35	37	41	51	45	57	90	87	104	119	830
Queen Creek Unified District	32	23	31	24	34	33	39	34	38	42	69	85	90	574
Apache Junction Unified District	22	15	20	17	16	12	14	29	25	32	30	32	27	291
Florence Unified School District	9	9	18	6	8	5	12	7	4	7	12	19	11	127
J. O. Combs Unified School Distric	8	6	8	9	6	10	10	11	1	6	6	14	9	104
Kyrene Elementary District	4	2	4	4	6	4	3	3	3	9	2	6	5	55
Tempe School District	3	1	2	4		1	2	1	3	1	1	4	4	27
Phoenix Elementary District	1	1		1	2	1			2	1	1	2	1	13
Roosevelt Elementary District	1		1		3	1	1	1	1					9
Maricopa Unified School District	1	1				2			1			2	1	8
Paradise Valley Unified District			2	2			1	1						6
Scottsdale Unified District			2							1	2		1	6
Washington Elementary District			1		1		1		2		1			6
Other	1	2	3	1	3	3	3	2	4	3	1	2	3	31
Total	394	355	369	312	324	327	329	378	368	484	479	546	585	5,250

Sources: Gilbert Public Schools, 2019; Applied Economics, 2020.

Table 2 shows where out-of-District students enrolled in 2019/20 and clearly illustrates the fact that out-of-District enrollment is concentrated in the District's high schools. With 600 students, Desert Ridge High School had the largest out-of-District enrollment this year and last year. Total out-of-District enrollment at Desert Ridge is unchanged from last year due to the fact that gains in 11th and 12th grade enrollment were offset by strong losses in 9th grade out-of-District enrollment, likely due to the fact that the newly opened Eastmark High School in the Queen Creek Unified School District is attracting students back into that district. Out-of-District enrollment losses also occurred at Desert Ridge Junior High School this year since Eastmark High School currently serves 7th and 8th grade classes.

Highland High School saw a large increase in out-of-District enrollment this year (28 percent) and enrolled the second largest number of out-of-District students (428 students) in 2019/20; this is somewhat unexpected since the school has been closed to open enrollment recently. With the addition of 63 students this year (a 22 percent increase), Campo Verde High School had the third largest enrollment of out-of-District students in 2019/20. Mesquite High School also enjoyed a 19 percent increase (32 students) in the number of out-of-District students that were enrolled this year.

TABLE 2
DESTINATION OF OUT-OF-DISTRICT ENROLLMENT BY GRADE: 2019/20

	Enrollment by Grade													
District	KG	1	2	3	4	5	6	7	8	9	10	11	12	Total
Desert Ridge High School										96	158	168	178	600
Highland High School										120	86	107	115	428
Campo Verde High School										84	73	98	101	356
Gilbert High School										84	72	75	81	312
Mesquite High School										61	62	67	85	275
Quartz Hill Elementary	33	23	41	28	30	32	30							217
Desert Ridge Junior High School								107	101					208
Augusta Ranch Elementary	27	23	30	19	22	17	25							163
Gilbert Classical Academy								30	30	35	26	27	13	161
Highland Junior High School								68	60					128
South Valley Junior High School								63	65					128
Gilbert Elementary	18	22	22	16	19	13	14							124
Islands Elementary	16	22	12	16	16	20	11							113
Mesquite Junior High School								56	56					112
Highland Park Elementary	20	20	10	18	17	13	9							107
Superstition Springs Elementary	19	14	22	13	9	16	12							105
Towne Meadows Elementary	18	14	13	16	15	15	14							105
Greenfield Junior High School								50	53					103
Harris Elementary	22	18	12	13	11	15	11							102
Neely Traditional Academy	17	16	19	13	13	12	11							101
Meridian Elementary	15	9	13	12	13	18	20							100
Ashland Ranch Elementary	13	11	14	15	12	13	16							94
Finley Farms Elementary	11	10	13	18	12	14	16							94
Canyon Rim Elementary	13	19	10	9	16	12	14							93
Pioneer Elementary	17	18	9	12	12	3	13							84
Spectrum Elementary	11	14	12	10	10	14	13							84
Patterson Elementary	14	11	13	7	14	16	7							82
Greenfield Elementary	15	9	14	8	10	14	10							80
Oak Tree Elementary	14	10	13	9	8	9	13							76
Houston Elementary	12	9	9	8	6	10	11							65
Mesquite Elementary	9	7	7	10	5	10	10	4	3					65
Val Vista Lakes Elementary	13	11	9	11	8	7	4							63
Carol Rae Ranch Elementary	8	8	11	7	6	7	11							58
Playa del Rey Elementary	9	11	7	7	11	3	10							58
Boulder Creek Elementary	6	8	9	3	10	10	10							56
Burk Elementary	6	6	6	8	8	6	6							46
Sonoma Ranch Elementary	9	7	10	4	6	3	3							42
Settler's Point Elementary	9	5	9	2	5	4	4							38
Gilbert Global Academy HS										4	2	4	11	21
The Aces- Gilbert						1	1							2
Sierra School of Gilbert													1	1
Oasis Behavioral Health														0
Total	394	355	369	312	324	327	329	378	368	484	479	546	585	5,250

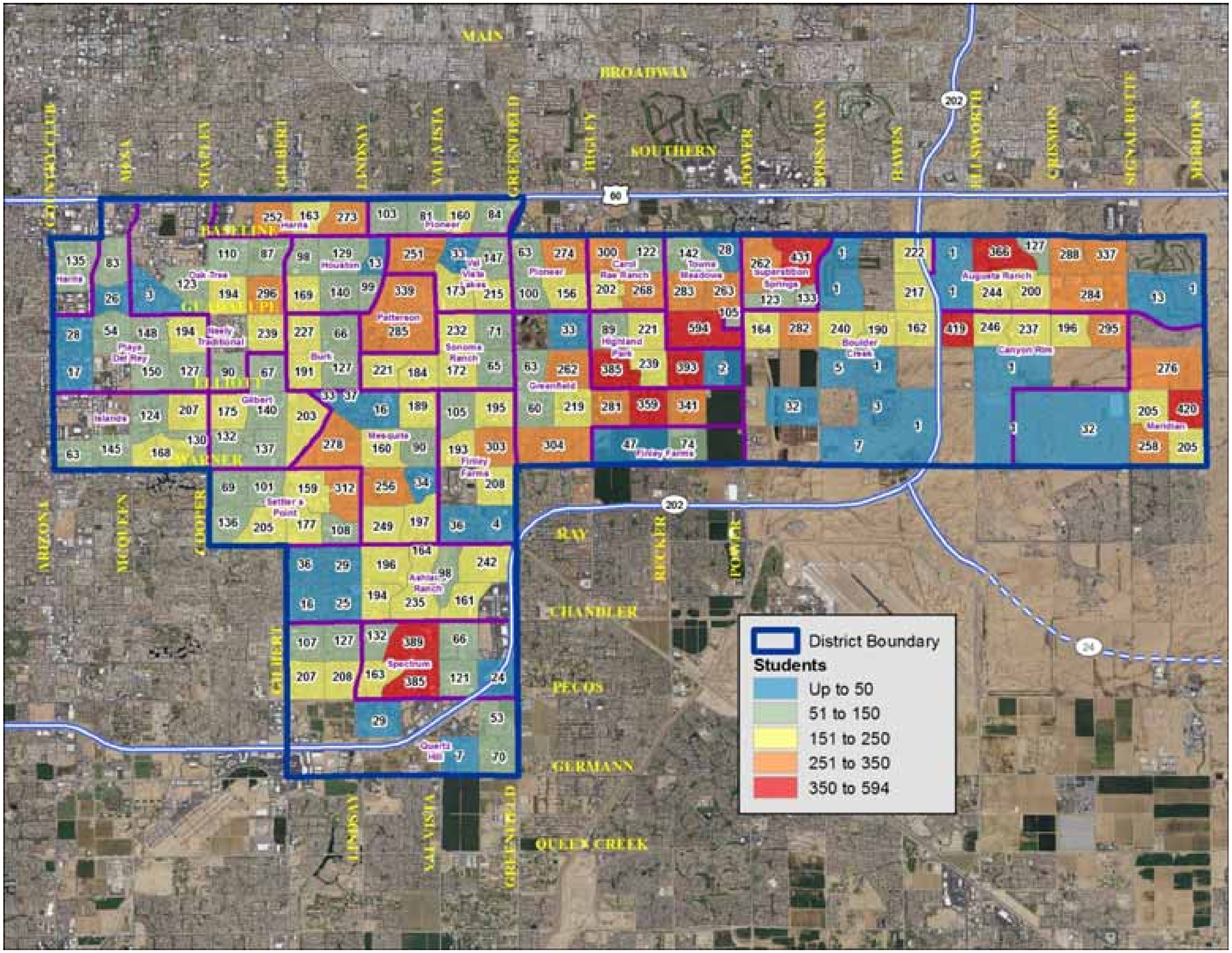
Sources: Gilbert Public Schools, 2019; Applied Economics, 2020.

Map 3 normalizes the distribution of the student point data by showing the number of students in each grid. This map shows a dispersed population with several pockets of higher student concentrations, generally in areas with newer housing developments.

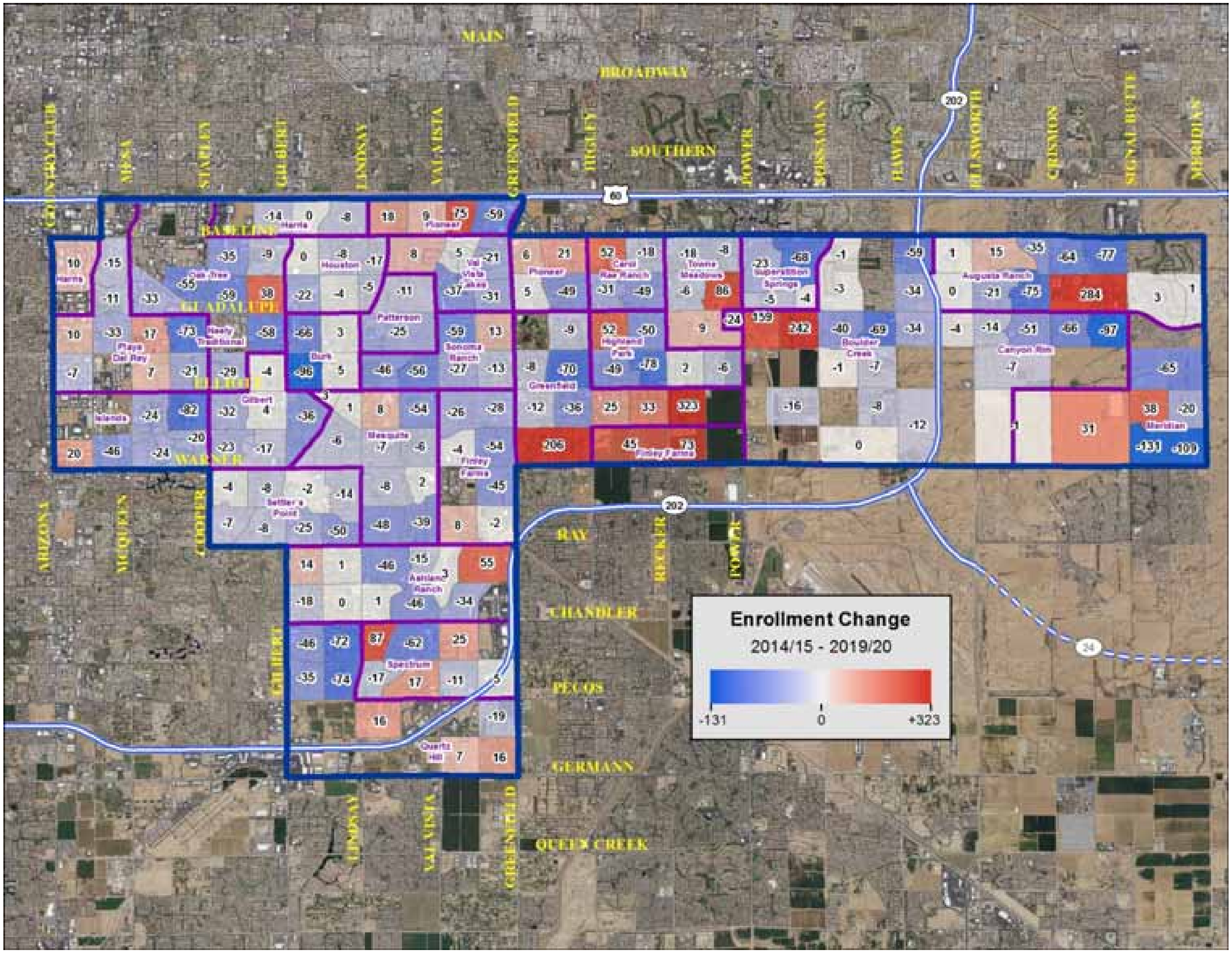
Both the point location and grid-level data are useful in examining changes in enrollment. **Map 4** shows the change in enrollment by planning grid over the past five years, during which time aggregate K-12 losses totaled almost 2,000 students. While areas of decline are widespread, pockets of enrollment growth are concentrated in the central portion of the District, generally between Greenfield and Sossaman Roads.

Map 5 shows the change in enrollment by planning grid over just the past year. It clearly illustrates that recent enrollment gains are somewhat more widespread and stronger than indicated by the longer-term trends shown in Map 4.

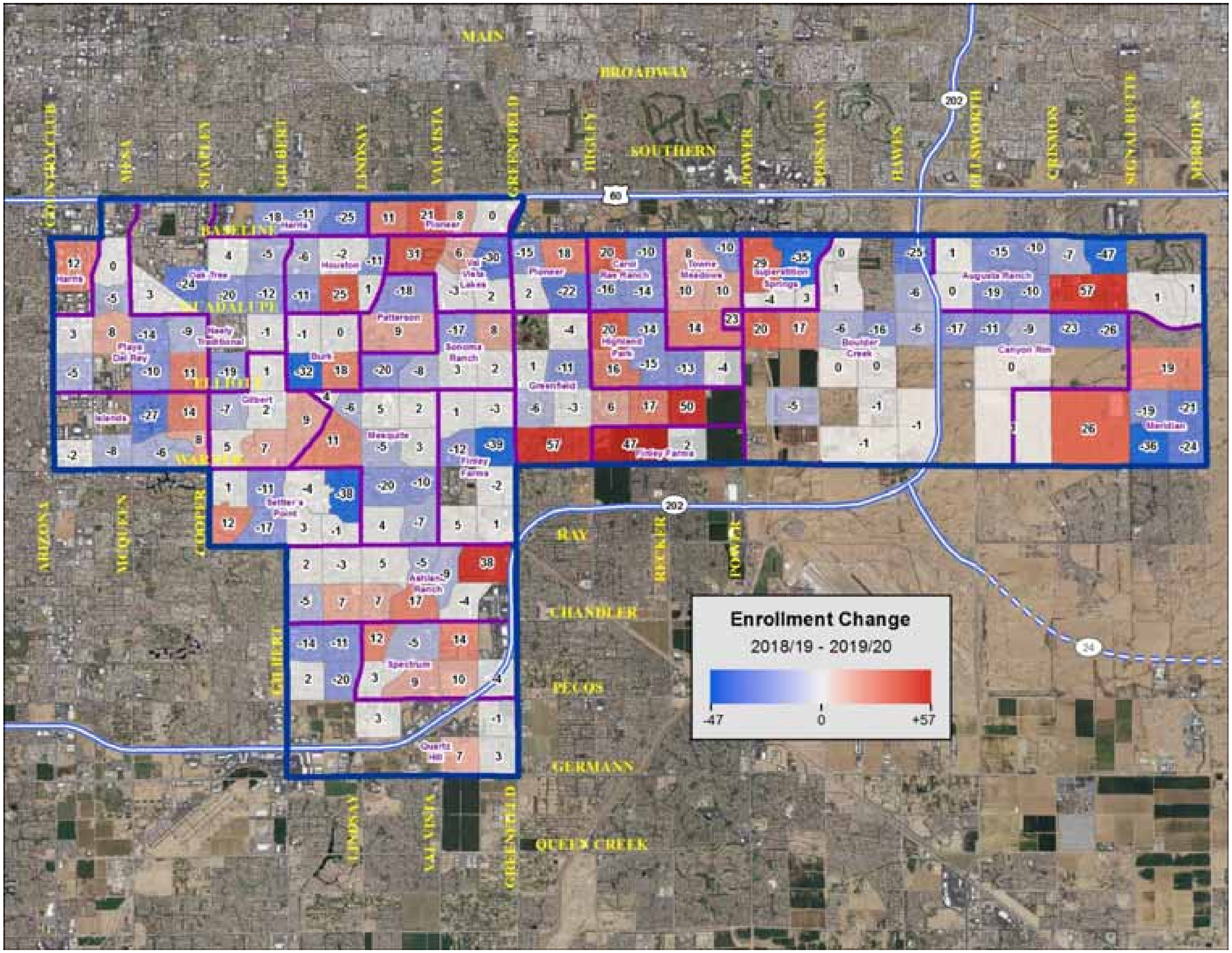
MAP 3
DISTRIBUTION OF DISTRICT ENROLLMENT BY PLANNING GRID: 2019/20



MAP 4
CHANGE IN K-12 ENROLLMENT BY PLANNING GRID: 2014/15 – 2019/20



MAP 5
CHANGE IN K-12 ENROLLMENT BY PLANNING GRID: 2018/19 – 2019/20



2.2 DEMOGRAPHIC TRENDS

Table 3 contains Census data on population and housing in the District for 2000 and 2010, along with estimates for 2019 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 by 2010, with the bulk of the increase occurring during the first half of the decade. Total population in 2019 was about 203,000, 10 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 2019, as the large number of young families that arrived in the District during the 1990s continued to age, the share of the population under 5 years of aged 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 to 21 percent, with a slight compositional shift toward the 14 to 17 age group. Those in the 25 to 44 age group, the group that 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 2019. Meanwhile, the population aged 45 to 64 years has grown significantly, increasing from about 17 percent to 25 percent; this growth has fueled the increase in enrollment at the high school level during the same period. Between 2010 and 2019, the population over 44 years increased 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 2019. However, the percentage of owner-occupied housing has fallen from 78 percent in 2000 to about 66 percent in 2019. 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, the roughly 3,500 units added between 2010 and 2019 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 2019, 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 over 3 persons per household on average in the District, a reflection of the young families that moved into new subdivisions at the edge of the metropolitan region. By 2019 the population per household fell to 2.75 persons as the District matured and new, entry-level housing became more limited in the District.

TABLE 3
POPULATION AND HOUSING TRENDS

	2000 Census		2010 Census		2019 Estimate		Change (2000-2010)		Change (2010-2019)	
	Total	Percent	Total	Percent	Total	Percent	Total	Change*	Total	Change*
Population										
Total	135,012	100.0%	184,433	100.0%	203,205	100.0%	49,421	3.2%	18,772	1.1%
By Race & Ethnicity:										
White	110,510	81.9%	139,303	75.5%	149,568	73.6%	28,793	2.3%	10,265	0.8%
African American	3,088	2.3%	5,658	3.1%	5,610	2.8%	2,570	6.2%	-48	-0.1%
Native American	742	0.5%	1,395	0.8%	1,844	0.9%	653	6.5%	449	3.2%
Asian	4,407	3.3%	8,968	4.9%	10,869	5.3%	4,561	7.4%	1,901	2.2%
Hispanic	16,130	11.9%	28,901	15.7%	35,027	17.2%	12,771	6.0%	6,126	2.2%
Other	135	0.1%	208	0.1%	287	0.1%	73	4.4%	79	3.6%
By Age:										
Age 0-4	13,461	10.0%	13,565	7.4%	14,049	6.9%	104	0.1%	484	0.4%
Age 5-13	22,786	16.9%	29,113	15.8%	29,606	14.6%	6,327	2.5%	493	0.2%
Age 14-17	8,459	6.3%	13,137	7.1%	13,750	6.8%	4,678	4.5%	613	0.5%
Age 18-24	10,396	7.7%	15,827	8.6%	16,479	8.1%	5,431	4.3%	652	0.4%
Age 25-44	49,087	36.4%	53,569	29.0%	56,661	27.9%	4,482	0.9%	3,092	0.6%
Age 45-64	22,651	16.8%	43,255	23.5%	50,994	25.1%	20,604	6.7%	7,739	1.8%
Age 65 Up	8,172	6.1%	15,967	8.7%	21,666	10.7%	7,795	6.9%	5,699	3.4%
Housing Units										
Total	47,996	100.0%	69,306	100.0%	78,671	100.0%	21,310	3.7%	9,365	1.4%
Occupied	44,552	92.8%	63,380	91.4%	73,767	93.8%	18,828	3.6%	10,387	1.7%
Owner	37,477	78.1%	46,553	67.2%	51,787	65.8%	9,076	2.2%	5,234	1.2%
Renter	7,075	14.7%	16,827	24.3%	21,980	27.9%	9,752	9.1%	5,153	3.0%
Vacant	3,444	7.2%	5,926	8.6%	4,904	6.2%	2,482	5.6%	-1,022	-2.1%
By Unit Type:										
Single Family	40,571	84.5%	57,843	83.5%	63,723	81.0%	17,272	3.6%	5,880	1.1%
Multifamily	7,425	15.5%	11,463	16.5%	14,948	19.0%	4,038	4.4%	3,485	3.0%
Households										
Total	44,552	100.0%	63,380	100.0%	73,767	100.0%	18,828	3.6%	10,387	1.7%
By Age of Householder:										
15 to 24	1,924	4.3%	2,404	3.8%	2,098	2.8%	480	2.3%	-306	-1.5%
25 to 34	11,436	25.7%	11,212	17.7%	12,462	16.9%	-224	-0.2%	1,250	1.2%
35 to 44	13,716	30.8%	15,740	24.8%	17,129	23.2%	2,024	1.4%	1,389	0.9%
45 to 54	8,610	19.3%	15,058	23.8%	16,562	22.5%	6,448	5.7%	1,504	1.1%
55 to 64	4,261	9.6%	9,503	15.0%	12,498	16.9%	5,242	8.4%	2,995	3.1%
65 to 74	2,865	6.4%	5,541	8.7%	8,061	10.9%	2,676	6.8%	2,520	4.3%
Over 75	1,740	3.9%	3,922	6.2%	4,956	6.7%	2,182	8.5%	1,034	2.6%
Population Per	3.03		2.91		2.75		-0.12	-0.4%	-0.16	-0.6%

Sources:
U.S. Bureau of the Census, 2000 and 2010; American Community Survey, 2019; Applied Economics, 2020.
* Annual compound rate of change.

2.3 CHARTER AND PRIVATE SCHOOL ENROLLMENT

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. Charter schools report enrollment to the state, as do district schools, but due to a one-year lag in the data reported to the Arizona Department of Education, charter enrollment for the 2018/19 school year is the most recent available. However, 40th day Average Daily Membership (ADM) data is available for 2019/20 and, while the figures differ from actual headcount data, the relationship between the two figures by school and grade is consistent enough to derive 2019/20 headcount estimates with a high degree of accuracy.

There are currently 15 charter schools serving K-12 students within the District, and an additional 25 charter schools within one mile of District boundaries. Combined, these schools serve nearly 19,900 students, as listed on **Table 4**. The largest of the charters in the District is Eduprize Schools Gilbert; with enrollment of nearly 1,900 students, it is roughly twice the size of any other in-District charter school; in addition, two in-District schools serve more than 800 students each (Noah Webster-Mesa and Legacy Traditional-East Mesa). Overall average enrollment per in-District charter school is about 500 K-12 students. 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 enroll a combined total of roughly 2,300 K-12 students. In addition, three other nearby charter schools enroll 800 or more K-12 students each. Two charter schools that opened in 2018/19, Legacy Traditional School-East Mesa and Leman Academy of Excellence-East Mesa, now enroll roughly 1,000 K-8 students at the two campuses.

Enrollment in grades K-8 comprises the vast majority (80 percent) of the 19,900 charter students in the area; this is down from a share of roughly 85 percent that had persisted for several years. Over the past three years, area charter schools have increased their 9-12 enrollment by more than 1,700 students, or nearly 78 percent. Charter enrollment growth has compounded the issue of aging-in-place that is occurring throughout the District and 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, 25 of the 40 charter schools are located just outside of the District, but within one mile of its boundaries. Additionally, five of the 15 charter schools operating within District boundaries are situated on the District side of a boundary road, while 12 of the 25 charter schools that are technically located outside District boundaries can be found on boundary roads. 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 BY SCHOOL

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	543
Challenger Basic School	1315 N. Greenfield Road	Gilbert	85234	K-6	281
Desert Hills High School	1515 S. Val Vista Drive	Gilbert	85296	9-12	267
Eduprize Schools Gilbert	580 W. Melody Avenue	Gilbert	85233	K-12	1856
Gilbert Arts Academy	862 E. Elliot Road	Gilbert	85234	K-7	162
Great Hearts Academies - Archway Arete	4525 E. Baseline Road	Gilbert	85234	K-5	543
Great Hearts Academies - Arete Prep	4525 E. Baseline Road	Gilbert	85234	6-12	557
Imagine West - Gilbert Elementary	2061 S. Gilbert Road	Gilbert	85295	K-5	168
Imagine West - Gilbert Middle	2061 S. Gilbert Road	Gilbert	85295	6-8	67
Liberty Arts Academy	3015 S. Power Road	Mesa	85212	K-8	292
Noah Webster Schools - Mesa	7301 E. Baseline Road	Mesa	85209	K-6	822
San Tan Charter School - Recker Campus	3959 E. Elliot Road	Gilbert	85234	K-8	633
San Tan Charter School - Power Campus	3232 Power Road	Gilbert	85234	7-12	305
Legacy Traditional School - East Mesa	10707 E. Guadalupe Road	Mesa	85209	K-8	864
Leman Academy of Excellence-East Mesa	3761 S. Power Road	Mesa	85212	K-8	119
In-District Total					7,479
Area Charter Schools**					
American Leadership Academy - Gilbert K-6	3155 S. Santan Village Parkway	Gilbert	85295	K-6	593
American Leadership Academy - Gilbert North K-6	1010 S. Higley Road	Gilbert	85296	K-6	828
American Leadership Academy - Gilbert North 7-12	1070 S. Higley Road	Gilbert	85296	7-12	1516
American Leadership Academy - Mesa K-6	4507 S. Mountain Road	Mesa	85212	K-6	427
AZ Compass Prep School	2020 N. Arizona Avenue	Chandler	85225	7-12	216
BASIS Mesa	5010 S. Eastmark Parkway	Mesa	85212	K-12	824
Burke Basic School	131 E. Southern Avenue	Mesa	85210	K-6	818
El Dorado High School	2200 N. Arizona Avenue	Chandler	85224	9-12	423
Great Hearts Academies - Archway Lincoln	2250 S. Gilbert Road	Chandler	85286	K-5	700
Great Hearts Academies - Lincoln Prep	2250 S. Gilbert Road	Chandler	85286	6-11	536
Imagine East Mesa Elementary	9701 E. Southern Avenue	Mesa	85208	K-6	648
Imagine East Mesa Middle	9701 E. Southern Avenue	Mesa	85208	7-8	131
Intelli-School Chandler	1727 N. Arizona Avenue	Chandler	85225	9-12	102
Leading Edge Academy Gilbert Early College	717 W. Ray Road	Gilbert	85233	7-12	296
Leading Edge Academy Gilbert Elementary	717 W. Ray Road	Gilbert	85233	K-6	198
Learning Foundation and Performing Arts - Gilbert	4055 E. Warner Road	Gilbert	85296	7-12	438
Learning Foundation and Performing Arts - Warner	3939 E. Warner Road	Gilbert	85296	K-6	381
Legacy Traditional School - North Chandler	1900 N. McQueen Road	Chandler	85225	K-8	946
Montessori Education Centre Charter School - Mesa	2834 E. Southern Avenue	Mesa	85204	K-6	256
Pathfinder Academy at Eastmark	4816 S. Eastmark Parkway	Mesa	85212	K-6	258
Sequoia Charter Elementary School	1460 S. Horne Street	Mesa	85204	K-6	471
Sequoia Secondary School	1460 S. Horne Street	Mesa	85204	7-12	403
Sun Valley High School	1143 Lindsay Road	Mesa	85204	9-12	467
Val Vista Academy	4120 S. Val Vista Drive	Gilbert	85297	K-8	319
Vector Prep & Arts Academy	2020 N. Arizona Avenue	Chandler	85225	K-6	226
Area Total					12,421
Grand Total					19,900

Source: Arizona Department of Education; Applied Economics 2019.

* 2019-20 ADM

** Charter schools located within approximately one mile of the District's boundaries.

MAP 6
GILBERT AREA SCHOOLS BY TYPE

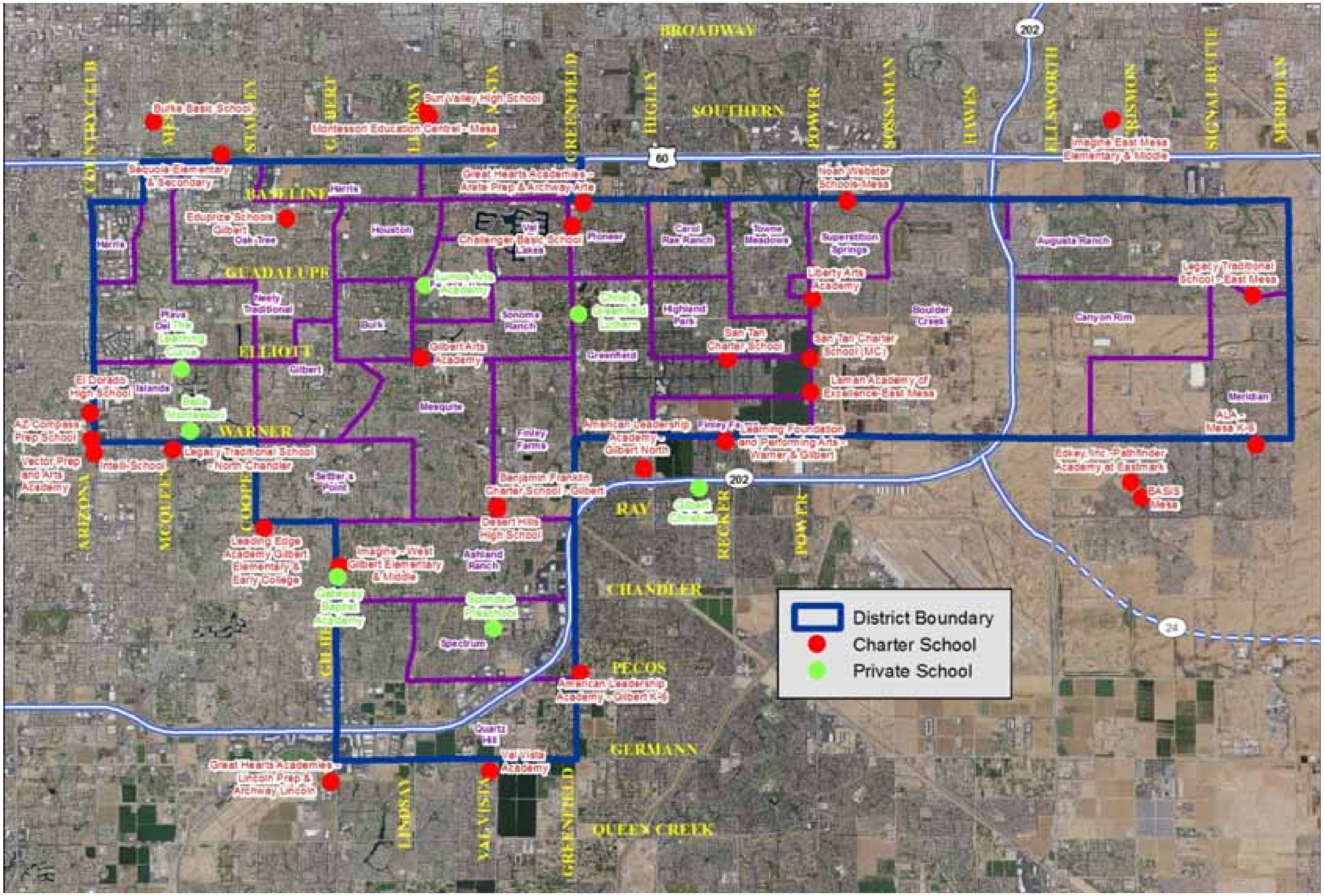


Table 5 shows charter school enrollment at the elementary and high school levels over the past ten years. The total number of charter schools located in and nearby the District has increased steadily since the 2010/11 school year, accompanied by comparable gains in net enrollment. In just the past three years, nearby charter enrollment has increased by 38 percent (adding 3,400 K-12 students), while in-District charter enrollment increased by 13 percent (850 students) during the same period. In both cases, the share of 9-12 students has steadily increased since 2016/17; high school students now account for nearly 20 percent of total local charter enrollment (up from 14 percent three years ago).

TABLE 5
ENROLLMENT IN LOCAL CHARTER SCHOOLS BY GRADE

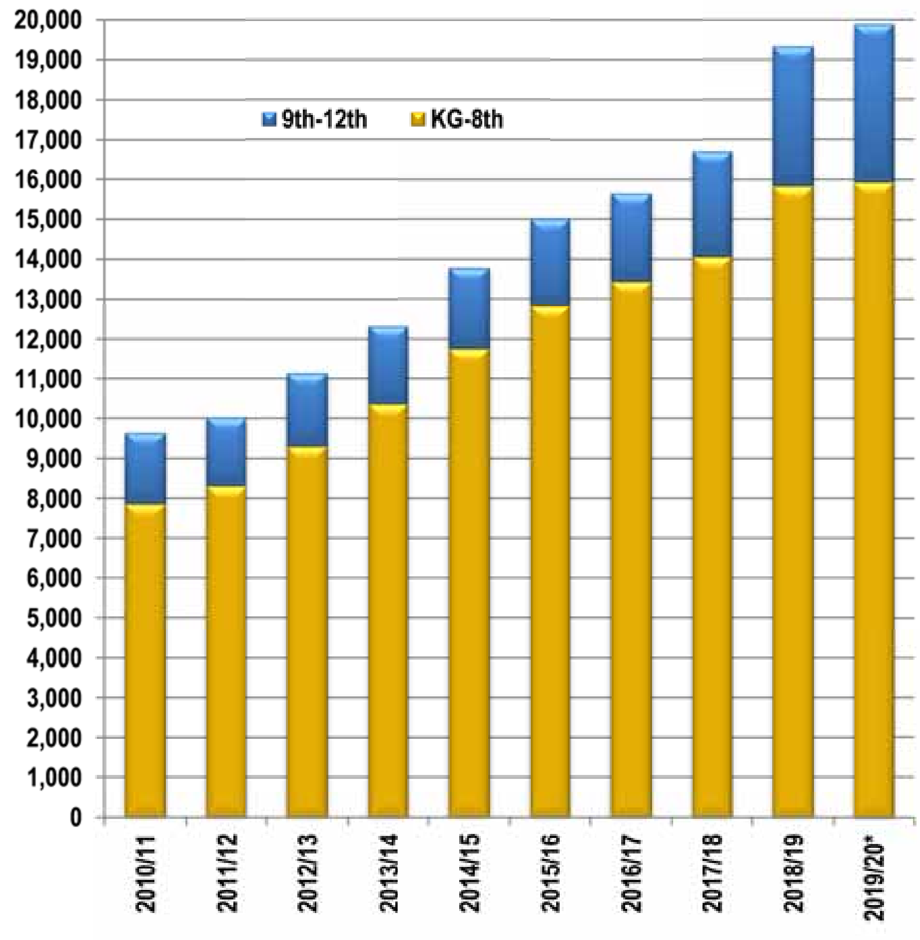
School Year	Number of Schools	KG-8th	Share	9th-12th	Share	KG-12	Annual Change
In District							
2010/11	14	4,868	86.7%	748	13.3%	5,616	358
2011/12	14	5,201	87.6%	738	12.4%	5,939	323
2012/13	14	5,432	87.9%	749	12.1%	6,181	242
2013/14	13	5,414	89.8%	618	10.2%	6,032	-149
2014/15	13	5,834	92.5%	470	7.5%	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	6,523	87.2%	956	12.8%	7,479	148
Area Charter Schools							
2010/11	13	2,997	74.4%	1,031	25.6%	4,028	163
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*	25	9,433	75.9%	2,988	24.1%	12,421	412
Total							
2010/11	27	7,865	81.6%	1,779	18.4%	9,644	521
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*	40	15,956	80.2%	3,944	19.8%	19,900	560

Source: Arizona Department of Education; Applied Economics 2019.
* 2019-20 ADM

Overall, total enrollment in area charter schools has grown by more than 10,800 students, or 118 percent, over the past 10 years. 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.

Figure 4 shows that the enrollment growth in local charter schools has been heavily concentrated in the elementary grades. Of the 10,800-student increase since the 2009/10, roughly 81 percent have been K-8 students, and this group now comprises around 80 percent of enrollment in District-area charter schools. However, 9-12 charter enrollment growth rates have risen significantly in the past three years, posting increases of 19 percent in 2017/18, 32 percent last year and nearly 13 percent this year; these rates are much higher than the five percent annual average growth in 9-12 charter enrollment that was realized between 2012/13 and 2016/17. 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 and just 0.7 percent this year.

FIGURE 4
DISTRIBUTION OF CHARTER ENROLLMENT BY GRADE COHORT: 2010/11 – 2019/20



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 and serving nearly 500 students (**Table 6)**. In addition, there is one private school located within one mile of the District's boundary, Gilbert Christian School, which enrolls more than 1,200 K-12 students.

TABLE 6
ENROLLMENT IN LOCAL PRIVATE SCHOOLS BY SCHOOL

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	200
In-District Total					479
Area Private Schools*					
Gilbert Christian Schools	3632 E. Jasper Drive	Gilbert	85296	PK-12	1,226
Area Total					1,226
Total					1,705

Sources: NCES Private School Universe Survey (PSS), 2017-18 school year data; Private School Review, 2019; Schola.io.com, 2019; Association of Christina Schools International, 2019; Applied Economics 2019.

* Private schools located within approximately one mile of the District's boundaries.

3.0 RESIDENTIAL DEVELOPMENT

3.1 HOUSING CONSTRUCTION

Residential development in the District has been strong in recent years, as can be seen below on **Table 7**. The residential building permits shown below are grouped into housing categories that reflect correlations between the types of housing and the age structure of the households likely to occupy them. Group quarter facilities, such as nursing homes, are not included as either retirement or multifamily housing.

Single family housing is diverse due to a range of available density levels. In 2009/10 about 80 percent of the housing in the District was single family between 2 and 4.5 lots-per-acre; by 2018/19 that category only accounted for 38 percent of the total due to the addition of increasing amounts of high-density products, both single family and multifamily, in the last two to three years. Apartment construction has become increasingly strong, especially in the San Tan Village area. Multifamily housing has accounted for 35 percent of total activity in the last ten years, which is fairly high for a suburban area. Age-restricted housing continues to be a stable component, but Sunland Springs is nearly built-out.

TABLE 7
HOUSING PERMITS

Housing Type	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	Total
Family Housing											
Single Family 2 du/ac or less	(1)	-	3	26	11	10	8	14	2	-	73
Single Family 2.01 - 3.5 du/ac	182	121	136	147	175	122	150	162	90	299	1,584
Single Family 3.51 - 4.5 du/ac	165	162	207	41	121	239	196	235	393	161	1,920
Single Family 4.51 - 6 du/ac	30	5	-	-	-	121	335	253	102	181	1,027
Single Family 6.01du/ac & Over	-	-	-	-	2	77	66	231	92	35	503
Single Family Attached	-	-	-	-	-	-	-	6	70	140	216
Total Single Family	376	288	346	214	309	569	755	901	749	816	5,323
Multifamily, Low Density	-	-	-	-	26	42	7	31	15	-	121
Multifamily, Standard Courtyard	-	-	275	107	524	200	278	687	-	-	2,071
Multifamily, Urban/Lifestyle	-	-	-	-	254	148	238	252	104	297	1,293
Total Multifamily	-	-	275	107	804	390	523	970	119	297	3,485
Total Non-Age-Restricted	376	288	621	321	1,113	959	1,278	1,871	868	1,113	8,808
Age-Restricted Housing											
Single Family 2.01 - 3.5 du/ac	7	27	31	38	55	85	63	98	16	8	428
Single Family 3.51 - 4.5 du/ac	28	11	5	25	7	6	8	-	29	39	158
Single Family 6.01du/ac & Over	-	11	12	6	31	22	39	-	-	-	121
Single Family Attached	20	15	14	40	30	27	8	-	-	-	154
Multifamily, Low Density	-	-	-	-	-	-	-	20	52	55	127
Total Age-restricted	55	64	62	109	123	140	118	118	97	102	988
Total	431	352	683	430	1,236	1,099	1,396	1,989	965	1,215	9,796

Sources: Maricopa Association of Governments; Construction Monitor; Maricopa County Assessor; Applied Economics, 2020.

Viewing the calendar year building permits by quarter (**Table 7A)** provides an alternate view of recent activity. Only single family (non-age-restricted) permits are shown due to the long lead times and construction periods involved with multifamily projects, which can distort short-term appearances.

Permit activity has grown significantly since 2017. The lower levels experienced in 2018 are largely the result of subdivisions at Morrison Ranch and Mulberry building out. In the case of Morrison Ranch, housing absorption exceeded the ability to open new replacement subdivisions. Notable also is the increase each quarter during 2019 since the third and fourth quarters typically have the lowest level of activity.

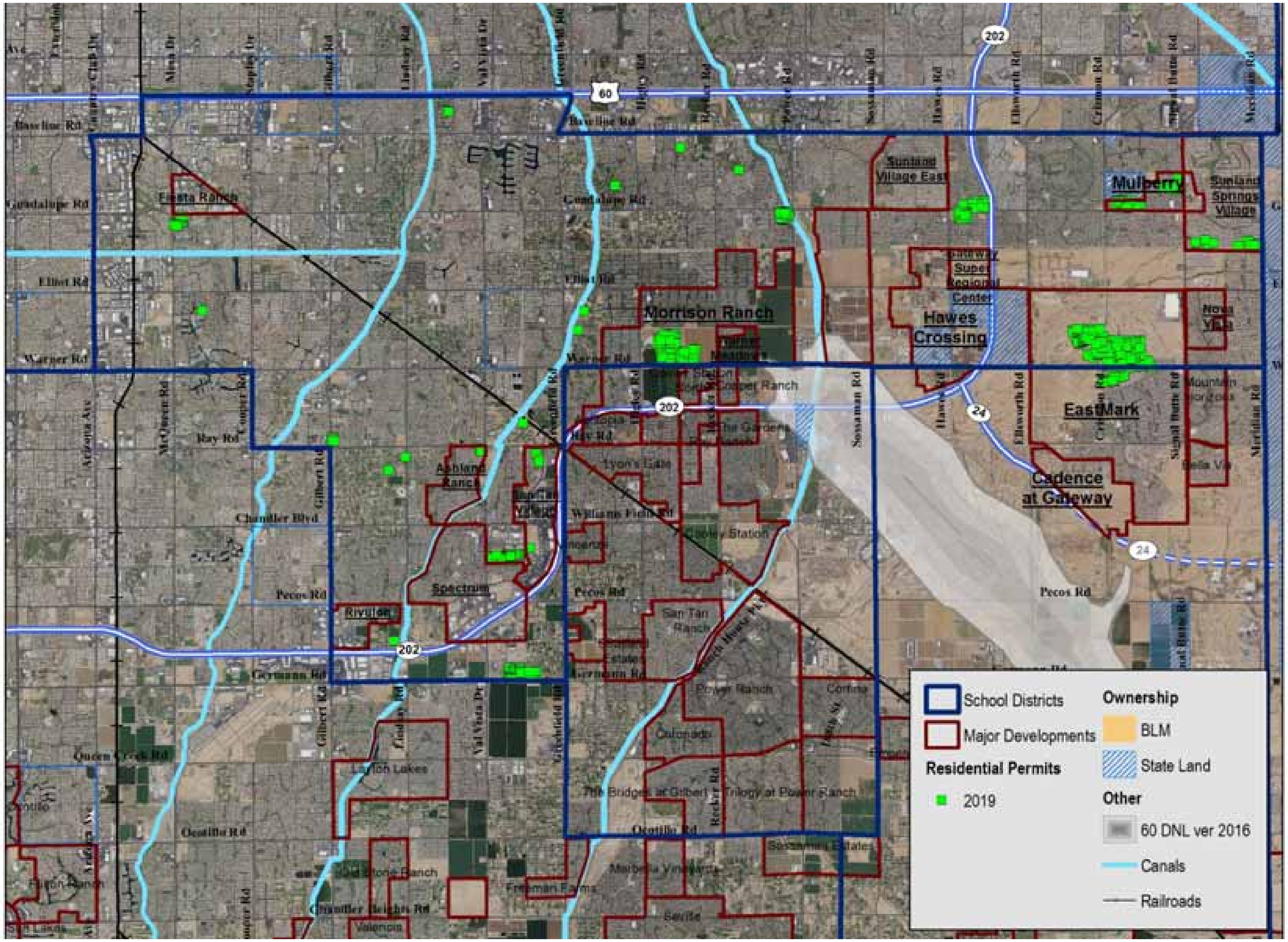
TABLE 7A
HOUSING PERMITS BY QUARTER

	2017					2018					2019				
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	3	-	-	2	5	-	-	-	-	-	-	-	-	-	-
Single Family 2.01 - 3.5 du/ac	34	39	24	20	117	26	20	32	46	124	99	122	92	99	412
Single Family 3.51 - 4.5 du/ac	63	60	79	101	303	97	116	34	18	265	51	58	69	67	245
Single Family 4.51 - 6 du/ac	68	60	33	24	185	12	33	36	53	134	39	53	84	66	242
Single Family 6.01du/ac & Ov	73	108	65	18	264	8	1	2	2	13	8	23	16	27	74
Single Family Attached	-	6	4	4	14	31	31	38	24	124	24	54	73	118	269
Total Single Family	241	273	205	169	888	174	201	142	143	660	221	310	334	377	1,242

Sources: Maricopa Association of Governments; Construction Monitor; Maricopa County Assessor; Applied Economics, 2020.

Recent development activity in the District is illustrated on **Map 7** with housing permits for 2019 marked in green. The heaviest clusters of activity are at Eastmark and Morrison Ranch, with smaller concentrations in other areas in the eastern portion of the District and in the San Tan Village area. There has not been much individual lot construction but there have been a number of small infill projects throughout the District. These are frequently the result of zoning changes to planned commercial parcels due to changes in the retail environment.

MAP 7
RESIDENTIAL PERMITTING



3.2 FUTURE DEVELOPMENT POTENTIAL

The identified residential potential in the District is estimated to be about 18,000 units. This includes defined projects and raw land with development potential beyond a practical ten-year horizon. **Table 8** shows projected unit counts by type of product and the estimated time period that construction **could begin** on lots within those projects, although developments are generally under construction over a number of years. The Infill category generally includes rural lots and small custom projects that are likely to be under development intermittently over a number of years. Both the unit potential and the timing estimates on this table will change as new information is acquired.

The exhaustion of vacant land, especially large development parcels, has created a situation where less than half of the total potential in the District is single family housing. Of the single family estimate, over 4,000 lots are located at Eastmark and the recently approved Hawes Crossing development; another 900 lots are split between Morrison Ranch and the adjacent Warner Meadows development. Multifamily development is expected to continue to be a major housing component in the District, but single family rental projects may take over some portion of that market.

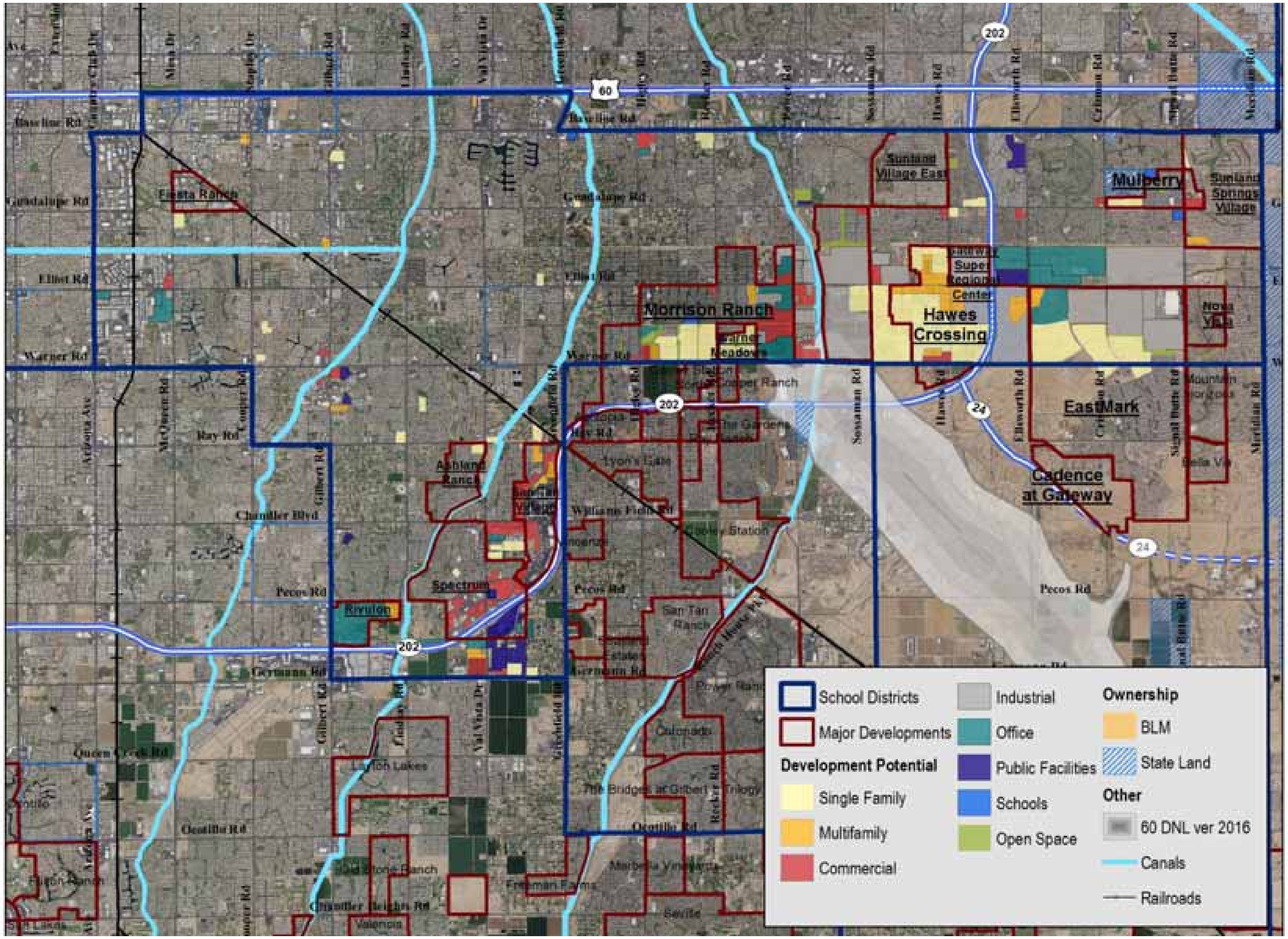
TABLE 8
POTENTIAL NEW HOUSING BY DEVELOPMENT TIMELINE

	Existing		Vacant Land					
Housing Type	Infill	Projects	1 Year	2-3 Years	3-5 Years	5-10 Years	10+ Years	Total
Family Housing								
Single Family 2 du/ac or less	4	-	23	-	10	246	-	283
Single Family 2.01 - 3.5 du/ac	-	165	184	87	-	-	180	616
Single Family 3.51 - 4.5 du/ac	832	163	123	152	648	-	-	1,918
Single Family 4.51 - 6 du/ac	-	200	105	51	312	606	-	1,274
Single Family 6.01du/ac & Over	-	93	152	234	-	1,263	762	2,504
Single Family Attached	-	199	269	337	44	-	316	1,165
Total Single Family	836	820	856	861	1,014	2,115	1,258	7,760
Multifamily, Low Density	-	-	-	-	-	840	485	1,325
Multifamily, Standard Courtyard	-	-	216	-	975	1,109	2,460	4,760
Multifamily, Urban/Lifestyle	-	35	328	214	489	2,075	1,023	4,164
Total Multifamily	-	35	544	214	1,464	4,024	3,968	10,249
Total	836	855	1,400	1,075	2,478	6,139	5,226	18,009
Age-Restricted Housing								
Single Family Attached	-	-	-	22	-	-	-	22
Multifamily, Low Density	-	1	-	-	-	-	-	1
Total Age-Restricted	-	1	-	22	-	-	-	23
Total	836	856	1,400	1,097	2,478	6,139	5,226	18,032

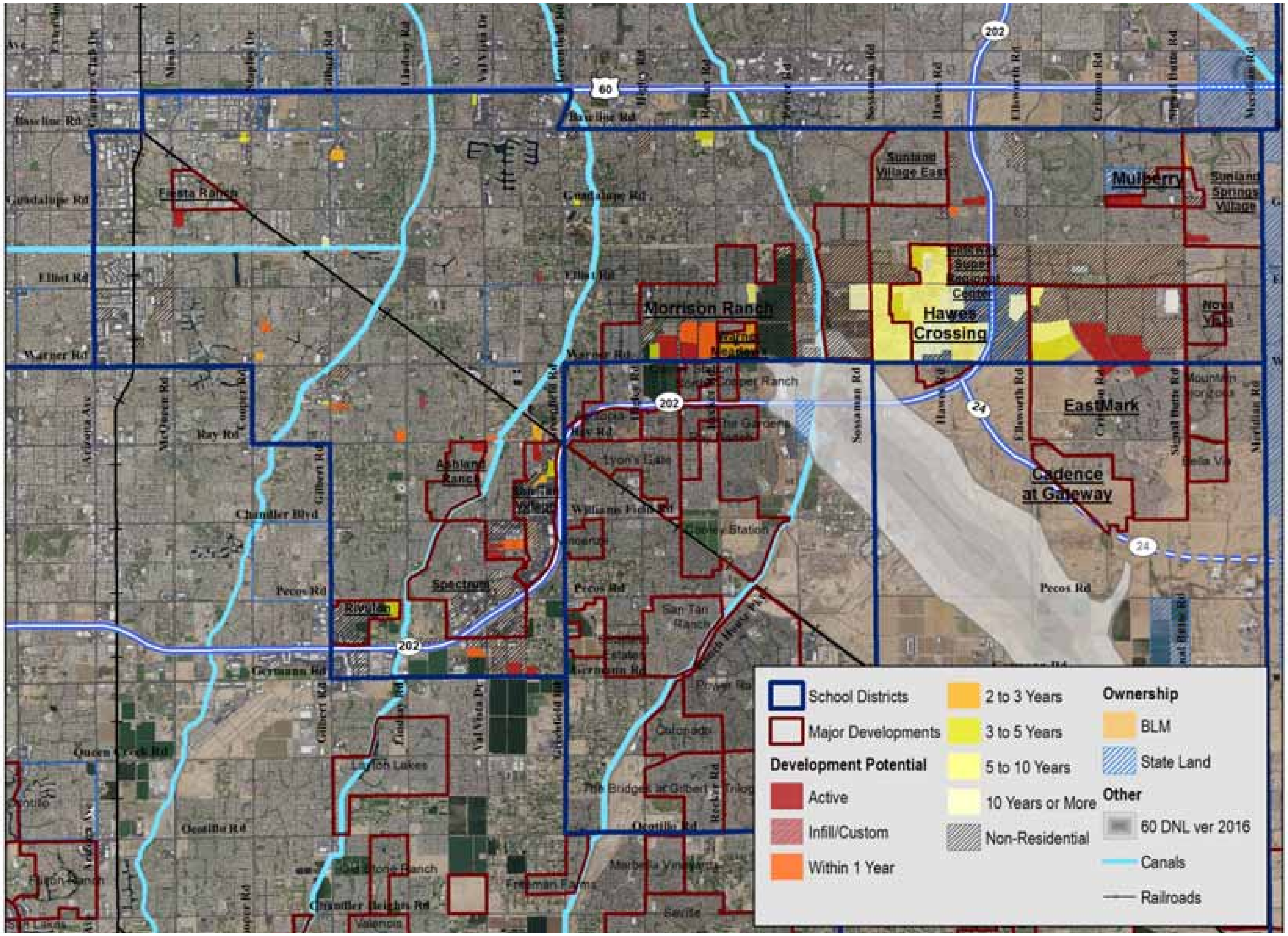
Sources: Town of Gilbert; City of Mesa; Applied Economics, 2020.

Maps 8 and 9 show active and future development areas by land use and the estimated timing to begin development, as presented on the table above.

MAP 8
FUTURE LAND USE



MAP 9
DEVELOPMENT TIMING



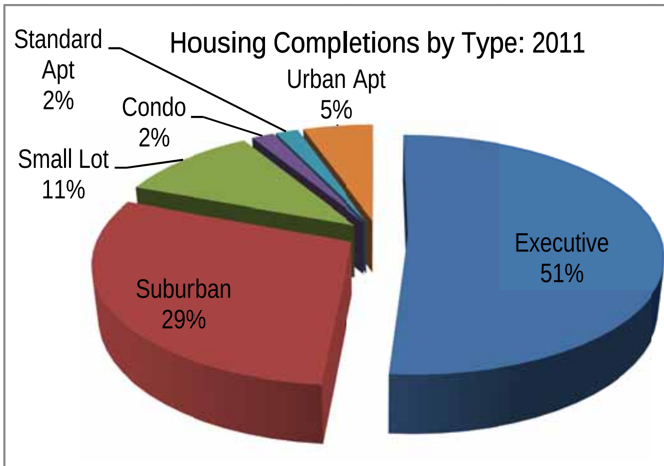
3.2.1 MARKET CONDITIONS

The State of Arizona continues to grow, with a population gain of 111,800 persons between July 2018 and July 2019. The Phoenix metropolitan area was the leading growth area of the state, accounting for 78 percent of the state population growth increasing by an average of 83,600 persons annually over the past five years. The City of Phoenix remains the fifth most-populous city and is currently the fastest growing city in the nation based on recent Census data. According to a Forbes article from May 2019, this growth is attributed to a "business-friendly environment, plentiful job opportunities and affordable cost of living".

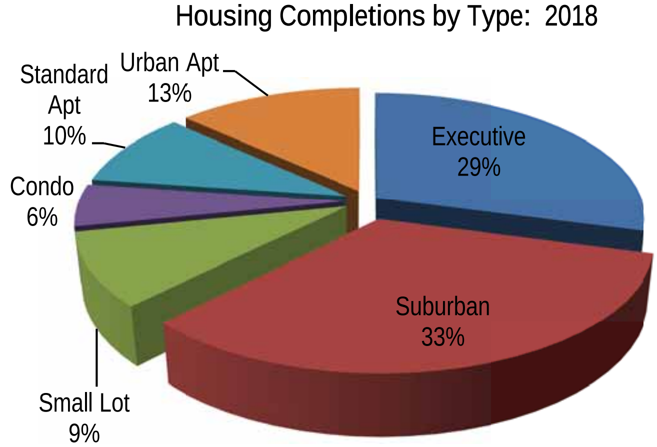
Housing prices in the Phoenix metro area compare favorably to other markets that are in competition for young, tech employees that now make up a significant part of the economy. While Seattle, Austin, and San Jose have much stronger tech growth, they also have significantly higher housing costs. Data from the National Association of Realtors provides a comparison. In the first quarter of 2019 the median sales price of existing single family houses in the U.S. was $254,800 versus $384,300 in the Western region. The Seattle median price was $497,000, or 129 percent of the Western region price. At $303,400 Austin was just 79 percent of the Western region median. San Jose was 317 percent above the Western region price with a median of $1,220,000. The Phoenix median price of $276,400 is only 72 percent of the Western region and 108 percent of the U.S. median, which is a favorable position for people considering a move within the west or nationally.

The great recession distorted the local housing market in several ways. Because of financial limitations the local housing market shifted both geographically and in type. Entry-level markets were especially impacted as housing starts in some areas of the metro region were seriously curtailed. The housing market has largely recovered with strong new construction activity taking place throughout the metro region, although activity in parts of Pinal County continues to be limited.

The impacts on housing diversity can be seen in the charts to the right, which show residential completion data for Maricopa County. In 2011, low-density executive housing accounted for about half of all residential completions in developments. This segment includes developments with fewer than 3.5 lots-per-acre and is typically a move-up market. In contrast, typical suburban housing only accounted for 29 percent of completions. This is the inverse of a normal market and a reflection of the distorted economic and lending conditions that existed during the recession.



Source: Maricopa Association of Governments, Applied Economics, 2019.



Source: Maricopa Association of Governments, Applied Economics, 2019.

By 2018 there were two notable market shifts. The single family market recovered as suburban densities increased and low-density properties accounted for a smaller proportion of new construction. The other significant change is the shift in metro area multifamily housing that has occurred as the market has recovered from the recession. New growth has been concentrated in high-amenity, high-rent properties that are generally located in urban centers or along major transportation corridors.

Overall, residential growth in the Phoenix metro region is expected to remain strong. While the economy is expected to slow in the next year, a major recession is not likely unless there is a significant disruptive action. The coronavirus pandemic may well provide that disruption but it is too early to accurately determine the overall impacts other than the obvious near-term disorder. The Phoenix metro area should be less susceptible to negative impacts due to the structural changes in the local economy and more measured increases in construction activity and housing prices that have occurred during the prolonged recovery period. Residential growth is expected to be more diverse both geographically and by housing type and price, though some parts of the region still lack sufficient diversity to provide an adequate buffer against future market downturns.

3.2.2 DEVELOPMENT PROJECTS

The residential market in the District has expanded in volume and product segmentation as it has matured. The presence of a variety of housing options leads to diversity in the market, which tends to increase stability and support a wider range of resident populations. **Table 9** provides additional detail on the economic characteristics of some of the developments in or near the District which reflect the buying populace. This table is not a comprehensive listing of all projects, but does show that the District is widely represented, except for entry-level products. Generally speaking, the southeast Valley is a move-up housing market, but this is somewhat offset by the amount of multifamily housing offered in the District.

TABLE 9
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	
Ashton Woods	Eastmark	17	1,567	3	$ 339,990	4,565	7	$ 482,990	$217	$106
	Estates at Eastmark	6	2,709	3	$ 468,990	5,206	7	$ 565,990	$173	$109
Blandford Homes	Mulberry -Americana	4	1,701	-	$ 320,000	2,925	-	NA	$188	$ -
Camelot Homes	Morrison Ranch - Heirloom	4	3,094	3	$ 779,900	5,427	6	$ 972,900	$252	$179
David Weekley	Eastmark - Harmony	6	2,120	3	$ 399,990	2,768	6	$ 445,990	$189	$161
	Eastmark - Reflections	7	2,830	3	$ 549,990	3,826	6	$ 610,990	$194	$160
Fulton Homes	Morrison Ranch - Lakeview Trails	6	1,631	3	NA	3,157	6	NA	$ -	$ -
Lennar Homes	Eastmark	8	1,739	3	$ 314,990	2,474	4	$ 376,990	$181	$152
Maracay Homes	Morrison Ranch - Lakeview Trails	4	2,990	4	$ 564,500	4,803	6	$ 649,500	$189	$135
	Annecy - The Lakes	7	1,261	2	$ 301,900	2,269	4	$ 361,900	$239	$159
Mattamy Homes	Tavera Park	4	1,699	3	$ 324,400	2,193	4	NA	$191	$ -
	Tavera Vista	6	1,784	3	$ 313,490	3,101	4	$ 379,490	$176	$122
New Village Homes	Andalucia	3	2,008	3	$ 332,990	2,202	4	$ 335,990	$166	$153
Porchlight Homes	Eastpoint	3	1,772	3	$ 299,900	2,225	4	$ 322,900	$169	$145
Richmond American	Springview - Seasons	6	1,590	3	$ 361,990	2,630	6	$ 419,990	$228	$160
Taylor Morrison	Whispering Rock	3	2,911	3	$ 540,990	3,509	5	$ 579,990	$186	$165
	Eastmark - Endeavor	7	1,957	3	$ 344,990	3,543	5	$ 400,990	$176	$113
Woodside Homes	Eastmark - Elegance	6	2,889	3	$ 479,990	4,611	8	$ 590,990	$166	$128
	Eastmark - Tranquility	8	2,201	3	$ 397,990	4,059	6	$ 501,990	$181	$124

Source: Builder websites; Applied Economics, March 23, 2020.

Prior to the Covid-19 pandemic the local housing market was experiencing increased demand with limited supply; the underlying market has been healthy but it is now undergoing a sudden disruptive event. Pending sales began to decline in late March 2020 and sales are expected to continue to decline, most sharply in the late spring and summer months. However, website traffic has remained strong, indicating continued buyer interest, and supply, which was already low, has declined further over the past year.

Although it is too early to know with any level of certainty, the current consensus is to expect a sharp slowing in residential sales followed by a relatively steady recovery as consumer confidence improves and mortgage interest rates remain low. Lower levels of construction activity should be expected at the very end of 2019/20 and through most of 2020/21, as builders engage in less speculative construction and keep inventories in check. In general, the District will grow more slowly in the near-term, but overall growth trends should continue due to the fact that there is a strong local residential market. There may be some delay in opening new subdivisions but most major projects in the District are already active or have grading or infrastructure underway; some projects have already been delayed due to ongoing labor shortages and the wet weather conditions experienced during the winter and early spring months. In some cases builders may complete the preparations and delay actual housing starts, but that would allow for a rapid resumption of activity when conditions and demand improve.

Future housing growth will be divided between single family and multifamily, and between the eastern and western areas of the District (using Greenfield Road as a line of separation). The eastern portion of the District will have more single family housing in master planned communities while the western area will have more multifamily growth and small infill projects.

Morrison Ranch has absorbed 3,200 single family housing units since production was initiated in 2004. This has been a highly successful community that is now entering its final phase at Lakeview Trails South. Construction of the first phase began in 2018; the initial Meritage Homes parcel is already built-out and two others are nearing completion. Grading and infrastructure installation (right) for the final five parcels at the northwest corner of Warner and Recker Roads is well advanced, with house construction commencing in summer 2020. Taylor Morrison and Toll Brothers will likely be the first to begin vertical construction, with Maracay and Fulton Homes starting soon after. There are 330 lots in this final phase of the development, and build-out is expected in 2022. Two multifamily parcels also remain with a potential yield of about 450 units, but these parcels are not expected to be developed in the near-term.

On the east side of Recker at Warner Road, Lennar Homes plans to begin land preparation for Warner Meadows by June 2020, with house construction to commence about a year later. This 486-unit project contains five product lines, from fairly low density units to attached single family options. Absorption is anticipated to be high and build-out is expected by 2024.

Construction activity inside the District at Eastmark is currently very strong with seven active builders in multiple subdivisions, but work will slow significantly in 2020/21 as the active subdivisions are built-out and activity shifts to parcels to the south that are outside of the District. Land and infrastructure preparation is ongoing on those parcels, although there may be a short pause before housing construction begins. There are several hundred lots in the parcels south of Warner and it is anticipated to be about 2023 before active house construction re-enters the District and single family build-out is expected late in the projection period.

Hawes Crossing, a 1,100-acre plan at Warner Road and the Loop 202, was approved by the Mesa City Council in April 2020. Current planning envisions an estimated 5,800 housing units split between single and multifamily, with much of the single family as high density products. It should be expected that the unit counts will likely decrease as parcels of land are platted. The land is still under multiple ownerships, including the State Land Department, and while infrastructure access should be fairly straightforward, there may be some issues transitioning the land from dairy farms to residential uses. It is not expected that housing development will begin before the middle of the projection period. Since this represents some of the last remaining large parcels of residential land in the vicinity, growth levels are likely to be strong and activity will continue well past the end of the projection period.

The San Tan Village area has been very active recently. The Annecy project of single family, attached housing at San Tan Village Parkway (just south of Williams Field Road) is an example of the development in the area. This 863-unit project originally opened in 2005/06 but was dormant by 2008 due to the housing market collapse. It remained idle until 2017 when Lennar Homes resumed construction on one parcel and Maracay Homes began work on another. The Lennar parcel is now built-out, while Maracay is completing one parcel and starting another (right). A final 251-unit parcel is being graded and is scheduled to open in February 2021. Final build-out of the remaining 350 units is expected in 2024.

Two apartment complexes totaling 680 units are currently under construction along San Tan Village Parkway. Two additional nearby projects with 515 units are anticipated to be added in the next two to five years, and P.B. Bell's Acero apartment complex near Val Vista and Germann Roads is in review; this new 328-unit project is expected to start construction in the next year. While there are no known current plans, it should be anticipated that some of the vacant land in the San Tan vicinity currently zoned for retail use may be changed to residential uses.

On Ray Road, between Gilbert and Greenfield Roads, are five projects that illustrate current and potential infill housing projects in the District. Cobblestone Villas (at Gilbert Road) consists of 68 lots on 11 acres that were built-out in 2019. At Lindsay Road is Seasons at Springview, a Richmond American project with 53 lots on 11 acres, where house construction began May 2020. At Val Vista Road are two active projects by New Village Homes: Andalucia Villas (101 lots on 11 acres) and Hampton Court (56 single family rental units on 5 acres). At Greenfield Road, Bungalows on Ray is planned for 159 single family rental units on 14 acres by Cavan Companies. Most, if not all, of these projects are on land that was once planned for retail use.

Infill projects elsewhere include Enclave at Madera Parc (at Cooper and Elliott Roads), where Porchlight Homes is installing infrastructure for a 52-lot subdivision. On Gilbert Road near Baseline is another Bungalows project, with 165 units that is expected to start in two to three years. Aspire Heritage is located next to downtown with plans to start within a year on 32 lots on less than three acres.

Overall, single family housing activity is expected to be strong over the next three years but then continually decline as projects build-out and vacant land is exhausted. Multifamily development is expected to remain fairly stable throughout the projection period.

4.0 DISTRICT PROJECTIONS

4.1 HOUSING AND POPULATION

Table 10 provides annual housing, household and population projections for the District through 2029/30 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 11,190 housing units over the next ten years, a 14 percent increase over the nearly 78,700 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 5,800 units or 51 percent), while more than 5,400 of the new units are projected to be single family; by 2029/30 the District's housing inventory is expected to total nearly 89,900 units.

TABLE 10
HOUSEHOLD AND POPULATION PROJECTIONS

		Housing Units				Occupancy	Vacant	Households		
Year	Population	Total*	New	New SF	New MF	Rate	Units	Total	Change	Pop/HH
2000/01	135,012	47,996				92.8%	3,444	44,552		3.030
2001/02	148,908	53,053	5,057	4,609	448	92.8%	3,841	49,212	4,660	3.026
2002/03	157,788	56,382	3,329	2,804	525	92.7%	4,119	52,263	3,051	3.019
2003/04	165,845	59,535	3,153	2,603	550	92.6%	4,388	55,147	2,884	3.007
2004/05	175,252	63,121	3,586	2,836	750	92.6%	4,693	58,428	3,281	2.999
2005/06	180,811	65,731	2,610	1,680	930	92.5%	4,930	60,801	2,373	2.974
2006/07	182,454	66,818	1,087	763	324	92.3%	5,152	61,666	864	2.959
2007/08	184,037	67,791	973	919	54	92.1%	5,370	62,421	755	2.948
2008/09	184,868	68,603	812	467	345	91.9%	5,579	63,024	604	2.933
2009/10	184,540	68,879	276	250	26	91.7%	5,745	63,134	109	2.923
2010/11	184,433	69,306	431	431	0	91.4%	5,926	63,380	246	2.910
2011/12	184,216	69,658	352	352	0	91.3%	6,037	63,621	241	2.896
2012/13	186,356	70,341	683	408	275	92.1%	5,590	64,751	1,130	2.878
2013/14	187,425	70,771	430	323	107	92.5%	5,274	65,497	746	2.862
2014/15	190,308	72,007	1,236	432	804	93.1%	4,933	67,074	1,578	2.837
2015/16	192,142	73,106	1,099	709	390	93.2%	4,955	68,151	1,076	2.819
2016/17	195,498	74,502	1,396	873	523	93.7%	4,724	69,778	1,627	2.802
2017/18	199,071	76,491	1,989	1,019	970	93.6%	4,899	71,592	1,814	2.781
2018/19	200,771	77,456	965	846	119	93.6%	4,931	72,525	934	2.768
2019/20	203,205	78,671	1,215	918	297	93.8%	4,904	73,767	1,241	2.755
2020/21	206,846	80,375	1,704	1,166	538	93.8%	4,946	75,429	1,663	2.742
2021/22	209,176	81,673	1,298	678	620	93.9%	4,959	76,714	1,284	2.727
2022/23	210,668	82,647	974	522	452	94.0%	4,959	77,688	974	2.712
2023/24	212,147	83,860	1,213	437	776	93.9%	5,116	78,744	1,056	2.694
2024/25	213,288	84,863	1,003	495	508	93.8%	5,262	79,601	857	2.679
2025/26	214,833	86,054	1,191	551	640	93.7%	5,422	80,632	1,031	2.664
2026/27	216,224	87,164	1,110	560	550	93.6%	5,579	81,585	953	2.650
2027/28	217,465	88,263	1,099	454	645	93.5%	5,737	82,526	941	2.635
2028/29	218,458	89,205	942	293	649	93.5%	5,798	83,407	881	2.619
2029/30	218,900	89,863	658	278	380	93.5%	5,841	84,022	615	2.605
2020/21 - 2029/30			11,192	5,434	5,758				10,255	

Source: Applied Economics, 2020.
Bolding Indicates Actuals

The increased presence of multifamily housing may enable younger families to live in the nearly 10,300 new households in the District by 2029/30. Although the population per household is expected to decline by about five 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 218,900 people by 2029/30. This 15,700-person addition equates to an increase of 7.7 percent over 2019/20, or about 0.8 percent per year on average.

4.2 DISTRICT ENROLLMENT

In addition to the volume and market orientation of household growth, trends in per-household student generation and capture rates 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 11**, the District currently has about 43,200 school-age persons, implying an average generation rate of 0.585 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 11
HISTORIC SCHOOL AGE POPULATION & ENROLLMENT

		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	41,785	0.657	37,884	0.595	3,901	0.907
2012/13	64,751	41,891	0.647	37,599	0.581	4,292	0.898
2013/14	65,497	41,740	0.637	37,294	0.569	4,446	0.893
2014/15	67,074	42,106	0.628	36,529	0.464	5,577	0.868
2015/16	68,151	42,142	0.618	35,624	0.454	6,518	0.845
2016/17	69,778	42,504	0.609	35,022	0.436	7,482	0.824
2017/18	71,592	42,956	0.600	34,542	0.420	8,414	0.804
2018/19	72,525	42,866	0.591	34,352	0.408	8,514	0.801
2019/20	73,767	43,176	0.585	34,544	0.397	8,632	0.800

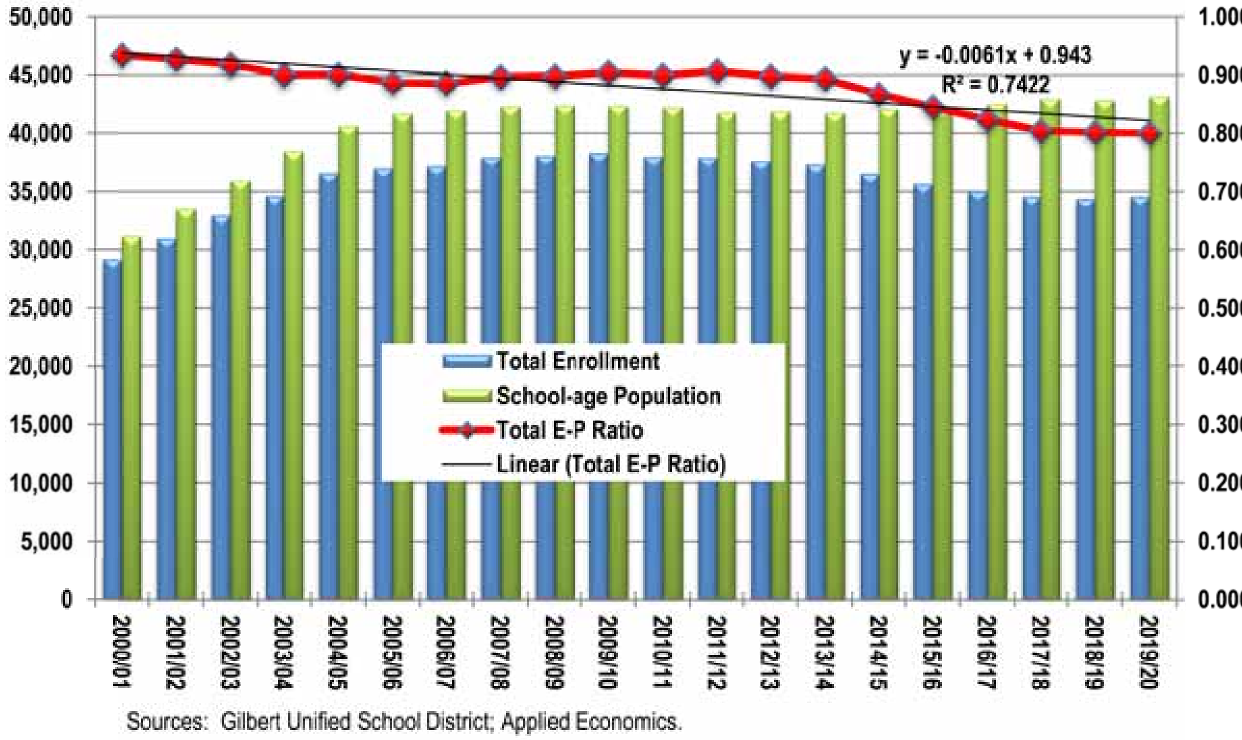
Source: Applied Economics, 2020.

* 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, expressed as a percentage and 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. While 0.585 school-age persons are being generated per household, the District only enrolls 0.397 students per household, resulting in an E-P ratio of 0.800, or 80 percent in 2019/20.

Please note that in this analysis the E-P ratio is based on the ***net difference*** between the school-age population and total District enrollment. The net difference includes the loss of some 13,900 in-District school-age persons to other providers and the gain of nearly 5,300 students at District schools from outside of the District. As illustrated in **Figure 5**, the difference between the school-age population and total enrollment has been increasing steadily in the District. In the past 19 years, the District's net E-P ratio has fallen by more than 14 percent (from .934 to .801), or roughly 0.61 percent per year. However, the rate has been steady the last two years due to large increases in the number of students from outside the District.

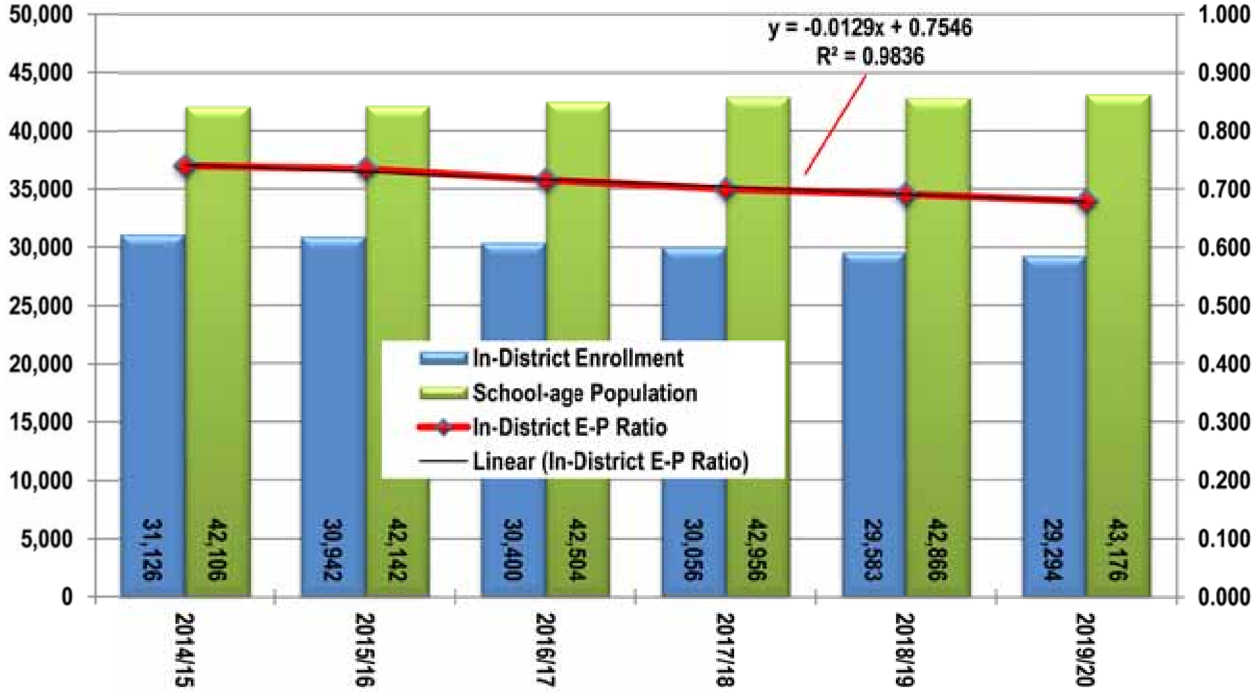
FIGURE 5
RECENT TRENDS IN SCHOOL-AGE POPULATION AND TOTAL ENROLLMENT



Sources: Gilbert Unified School District; Applied Economics.

This in-District EP ratio can also be used to assess how successful the District is in capturing that portion of the school-age population that resides within the District by eliminating the addition of students that are enrolled but live outside of the District's boundaries. In this case, the E-P ratio is based on the net difference between the school-age population and ***in-District*** enrollment. In 2019/20, in-District enrollment totaled 29,294 students, resulting in a net difference of 13,882 persons and an in-District E-P ratio of 67.8 percent, which is considerably lower than the net E-P ratio (80 percent) that is based on the District's total enrollment. Since 2014/15, the in-District E-P ratio has decreased by nearly seven percent (or about 1.29 percent per year), as shown in **Figure 6**.

FIGURE 6
RECENT TRENDS IN SCHOOL-AGE POPULATION AND IN-DISTRICT ENROLLMENT



Sources: Gilbert Unified School District; Applied Economics.

The E-P ratio 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 meaningful E-P ratio 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 Trend," as presented in **Table 12**, assumes a more gradual decline of the in-District E-P ratio (from 67.8 to 61.8 percent). The "Short-Term Trend," detailed in **Table 13**, assumes a more aggressive decline of the in-District E-P ratio (from 67.8 to 55.9 percent). Finally, the "Mid-Point" projection (**Table 14**) uses an E-P-ratio that reflects the mid-point between the Long-Term and Short-Term Trend E-P ratios for the in-District portion of enrollment (from 67.8 to 58.8 percent). Out-of-District enrollment is the same in each scenario and is presumed to increase slightly during the first half of the projection period and then stabilize somewhat during the second half as growth in the school-age population of the Southeast Valley slows and eventually begins to decline.

TABLE 12
PROJECTED IN-DISTRICT SCHOOL AGE POPULATION & ENROLLMENT
LONG-TERM TREND

Year	Households	School-Age Population *		K-12	Out of District		In-district K-12 Enrollment		In-district	E-P Ratio	
		Total	Per HH	Enrollment	Count	Share	Total	Per Household	Difference	Total	In-District
2014/15	**67,074**	**42,106**	**0.628**	**36,529**	**5,403**	**14.8%**	**31,126**	**0.464**	**10,980**	**0.868**	**0.739**
2015/16	**68,151**	**42,142**	**0.618**	**35,624**	**4,682**	**13.1%**	**30,942**	**0.454**	**11,200**	**0.845**	**0.734**
2016/17	**69,778**	**42,504**	**0.609**	**35,022**	**4,622**	**13.2%**	**30,400**	**0.436**	**12,104**	**0.824**	**0.715**
2017/18	**71,592**	**42,956**	**0.600**	**34,542**	**4,486**	**13.0%**	**30,056**	**0.420**	**12,900**	**0.804**	**0.700**
2018/19	**72,525**	**42,866**	**0.591**	**34,352**	**4,769**	**13.9%**	**29,583**	**0.408**	**13,283**	**0.801**	**0.690**
2019/20	**73,767**	**43,176**	**0.585**	**34,544**	**5,250**	**15.2%**	**29,294**	**0.397**	**13,882**	**0.800**	**0.678**
2020/21	75,429	43,754	0.580	34,714	5,294	15.3%	29,420	0.390	14,335	0.793	0.6724
2021/22	76,714	43,987	0.573	34,636	5,316	15.3%	29,320	0.382	14,666	0.787	0.6666
2022/23	77,688	44,045	0.567	34,476	5,385	15.6%	29,091	0.374	14,954	0.783	0.6605
2023/24	78,744	44,040	0.559	34,284	5,418	15.8%	28,866	0.367	15,174	0.778	0.6555
2024/25	79,601	44,016	0.553	33,982	5,438	16.0%	28,544	0.359	15,472	0.772	0.6485
2025/26	80,632	44,059	0.546	33,725	5,414	16.1%	28,311	0.351	15,748	0.765	0.6426
2026/27	81,585	44,085	0.540	33,472	5,413	16.2%	28,059	0.344	16,027	0.759	0.6365
2027/28	82,526	44,050	0.534	33,194	5,418	16.3%	27,776	0.337	16,273	0.754	0.6306
2028/29	83,407	43,939	0.527	32,853	5,415	16.5%	27,438	0.329	16,501	0.748	0.6245
2029/30	84,022	43,756	0.521	32,482	5,431	16.7%	27,051	0.322	16,705	0.742	0.6182

Source: Applied Economics, 2020.
* Population age 5 through 17, corresponds with Kindergarten through 12th grade.
Bolding indicates historical data.

TABLE 13
DISTRICT STUDENT POPULATION & ENROLLMENT PROJECTIONS
SHORT-TERM TREND

Year	Households	School-Age Population *		K-12	Out of District		In-district K-12 Enrollment		In-district	E-P Ratio	
		Total	Per HH	Enrollment	Count	Share	Total	Per Household	Difference	Total	In-District
2014/15	**67,074**	**42,106**	**0.628**	**36,529**	**5,403**	**14.8%**	**31,126**	**0.464**	**10,980**	**0.868**	**0.739**
2015/16	**68,151**	**42,142**	**0.618**	**35,624**	**4,682**	**13.1%**	**30,942**	**0.454**	**11,200**	**0.845**	**0.734**
2016/17	**69,778**	**42,504**	**0.609**	**35,022**	**4,622**	**13.2%**	**30,400**	**0.436**	**12,104**	**0.824**	**0.715**
2017/18	**71,592**	**42,956**	**0.600**	**34,542**	**4,486**	**13.0%**	**30,056**	**0.420**	**12,900**	**0.804**	**0.700**
2018/19	**72,525**	**42,866**	**0.591**	**34,352**	**4,769**	**13.9%**	**29,583**	**0.408**	**13,283**	**0.801**	**0.690**
2019/20	**73,767**	**43,176**	**0.585**	**34,544**	**5,250**	**15.2%**	**29,294**	**0.397**	**13,882**	**0.800**	**0.678**
2020/21	75,429	43,754	0.580	34,456	5,294	15.4%	29,162	0.387	14,593	0.787	0.6665
2021/22	76,714	43,987	0.573	34,102	5,316	15.6%	28,786	0.375	15,200	0.775	0.6544
2022/23	77,688	44,045	0.567	33,687	5,385	16.0%	28,302	0.364	15,743	0.765	0.6426
2023/24	78,744	44,040	0.559	33,187	5,418	16.3%	27,769	0.353	16,271	0.754	0.6305
2024/25	79,601	44,016	0.553	32,661	5,438	16.6%	27,223	0.342	16,793	0.742	0.6185
2025/26	80,632	44,059	0.546	32,137	5,414	16.8%	26,723	0.331	17,336	0.729	0.6065
2026/27	81,585	44,085	0.540	31,627	5,413	17.1%	26,214	0.321	17,872	0.717	0.5946
2027/28	82,526	44,050	0.534	31,077	5,418	17.4%	25,659	0.311	18,390	0.706	0.5825
2028/29	83,407	43,939	0.527	30,484	5,415	17.8%	25,069	0.301	18,870	0.694	0.5705
2029/30	84,022	43,756	0.521	29,867	5,431	18.2%	24,436	0.291	19,320	0.683	0.5585

Source: Applied Economics, 2020.
* Population age 5 through 17, corresponds with Kindergarten through 12th grade.
Bolding indicates historical data.

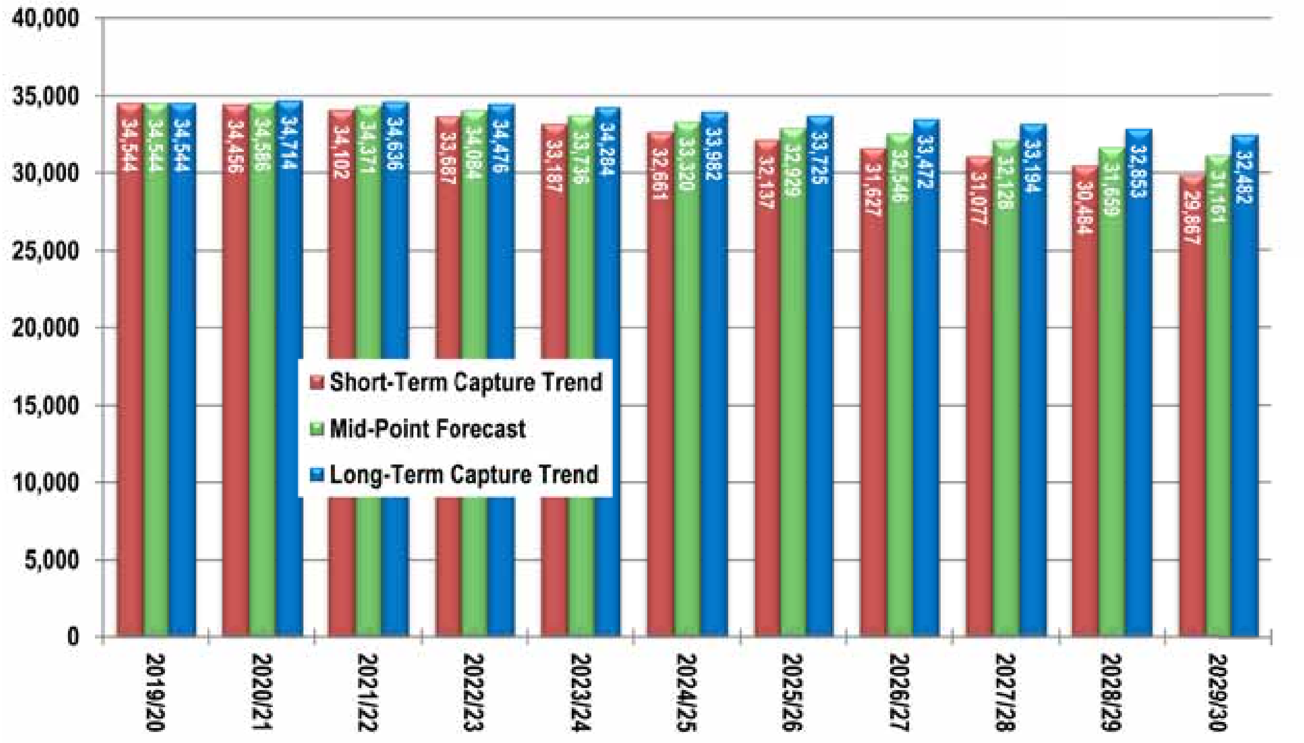
TABLE 14
DISTRICT STUDENT POPULATION & ENROLLMENT PROJECTIONS
MID-POINT PROJECTION

		School-Age Population *		K-12	Out of District		In-district K-12 Enrollment		In-district	E-P Ratio	
Year	Households	Total	Per HH	Enrollment	Count	Share	Total	Per Household	Difference	Total	In-District
2014/15	**67,074**	**42,106**	**0.628**	**36,529**	**5,403**	**14.8%**	**31,126**	**0.464**	**10,980**	**0.868**	**0.739**
2015/16	**68,151**	**42,142**	**0.618**	**35,624**	**4,682**	**13.1%**	**30,942**	**0.454**	**11,200**	**0.845**	**0.734**
2016/17	**69,778**	**42,504**	**0.609**	**35,022**	**4,622**	**13.2%**	**30,400**	**0.436**	**12,104**	**0.824**	**0.715**
2017/18	**71,592**	**42,956**	**0.600**	**34,542**	**4,486**	**13.0%**	**30,056**	**0.420**	**12,900**	**0.804**	**0.700**
2018/19	**72,525**	**42,866**	**0.591**	**34,352**	**4,769**	**13.9%**	**29,583**	**0.408**	**13,283**	**0.801**	**0.690**
2019/20	**73,767**	**43,176**	**0.585**	**34,544**	**5,250**	**15.2%**	**29,294**	**0.397**	**13,882**	**0.800**	**0.678**
2020/21	75,429	43,754	0.580	34,586	5,294	15.3%	29,292	0.388	14,463	0.790	0.6695
2021/22	76,714	43,987	0.573	34,371	5,316	15.5%	29,055	0.379	14,931	0.781	0.6605
2022/23	77,688	44,045	0.567	34,084	5,385	15.8%	28,699	0.369	15,346	0.774	0.6516
2023/24	78,744	44,040	0.559	33,736	5,418	16.1%	28,318	0.360	15,722	0.766	0.6430
2024/25	79,601	44,016	0.553	33,320	5,438	16.3%	27,882	0.350	16,134	0.757	0.6335
2025/26	80,632	44,059	0.546	32,929	5,414	16.4%	27,515	0.341	16,544	0.747	0.6245
2026/27	81,585	44,085	0.540	32,546	5,413	16.6%	27,133	0.333	16,953	0.738	0.6155
2027/28	82,526	44,050	0.534	32,128	5,418	16.9%	26,710	0.324	17,339	0.729	0.6064
2028/29	83,407	43,939	0.527	31,659	5,415	17.1%	26,244	0.315	17,695	0.721	0.5973
2029/30	84,022	43,756	0.521	31,161	5,431	17.4%	25,730	0.306	18,026	0.712	0.5880

Source: Applied Economics, 2020.
* Population age 5 through 17, corresponds with Kindergarten through 12th grade.
Bolding indicates historical data.

Despite the projected addition of nearly 10,300 households by 2029/30, the continued decline in school-age population per household is expected to result in a net gain of only 580 school-age persons during the 10-year period. When the projected school-age population is combined with a falling in-District E-P ratio, each scenario projects a drop in total enrollment by 2029/30 but at varying rates of decline. **Figure 7** compares the K-12 enrollment projections by scenario, illustrating the magnitude of the various assumptions regarding the in-District E-P ratio over time. As the presence of alternative providers has grown, the E-P ratio 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 projection scenario.

FIGURE 7
DISTRICT ENROLLMENT: 2019/20 - 2029/30
ALTERNATIVE E-P RATIO SCENARIOS



Sources: Applied Economics, 2020.

4.3 ENROLLMENT BY LEVEL

Table 15 provides a more detailed review of recent past and projected enrollment changes by showing enrollment by grade cohort, in this case employing a K-6, 7-8 and 9-12 cohort summation. Assuming a moderate E-P ratio decline, the District is expected to experience a loss of about 3,400 students by 2029/30 (roughly 10 percent of 2019/20 enrollment), yielding total enrollment of 31,160 K-12 students. Losses in the first half of the projection period are expected to average about 0.7 percent per year; during the second five-year period, enrollment declines are expected to accelerate slightly, averaging 1.3 percent per year.

K-6 enrollment is projected to fluctuate slightly during the first half of the projection period but remain nearly unchanged by 2024/25. Declines are expected to accelerate during the second five-year period, averaging one percent per year, resulting in an overall decrease in K-6 enrollment of nearly 800 students (4.6 percent) by 2029/30.

Enrollment in the 7-8 cohort is projected to decline sharply during the first five years of the projection period (peaking at 6.1 percent in 2023/24 and averaging 2.7 percent per year) as the lagged effects of smaller K-6 classes (due to the aging of the area's population and persisting low birth rates stemming from the recession) are expected to begin impacting enrollment in the upper elementary grades. Despite a brief period of enrollment increases at the beginning of the second five-year period, 7-8 enrollment is expected to decline further during the final years of the projection period. By 2029/30, 7-8 enrollment is projected to total roughly 4,700 students, representing a decline of nearly 17.5 percent (1,000 students) over the next 10 years.

TABLE 15
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
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	16,573	5,570	22,143	12,443	34,586	42	0.1%
2021/22	16,496	5,422	21,918	12,453	34,371	-215	-0.6%
2022/23	16,466	5,307	21,773	12,311	34,084	-287	-0.8%
2023/24	16,651	4,983	21,634	12,102	33,736	-348	-1.0%
2024/25	16,613	4,982	21,595	11,725	33,320	-416	-1.2%
2025/26	16,672	5,068	21,740	11,189	32,929	-391	-1.2%
2026/27	16,492	4,989	21,481	11,065	32,546	-383	-1.2%
2027/28	16,363	5,001	21,364	10,764	32,128	-418	-1.3%
2028/29	16,132	4,871	21,003	10,656	31,659	-469	-1.5%
2029/30	15,763	4,726	20,489	10,672	31,161	-498	-1.6%

Source: Applied Economics, 2020.
Bolding indicates actuals.

In the coming years, the 9-12 grade cohort will be less affected by new housing additions and any increases that do result will be offset by the advancement of smaller in-coming classes, partly due to the birthrate plunge during the Great Recession; in addition, recent trends suggest that the effect of alternative providers on high school enrollment will likely be more significant than in the past. As a result, 9-12 enrollment is projected to increase slightly over the next two years and then decline by an average of two percent per year throughout the rest of the projection period. By 2029/30, 9-12 enrollment is projected to decline by about 1,600 students (or 13 percent), dropping to 10,670 students by the end of the period.

5.0 SUB-DISTRICT 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 2029/30 for each grid area were developed.

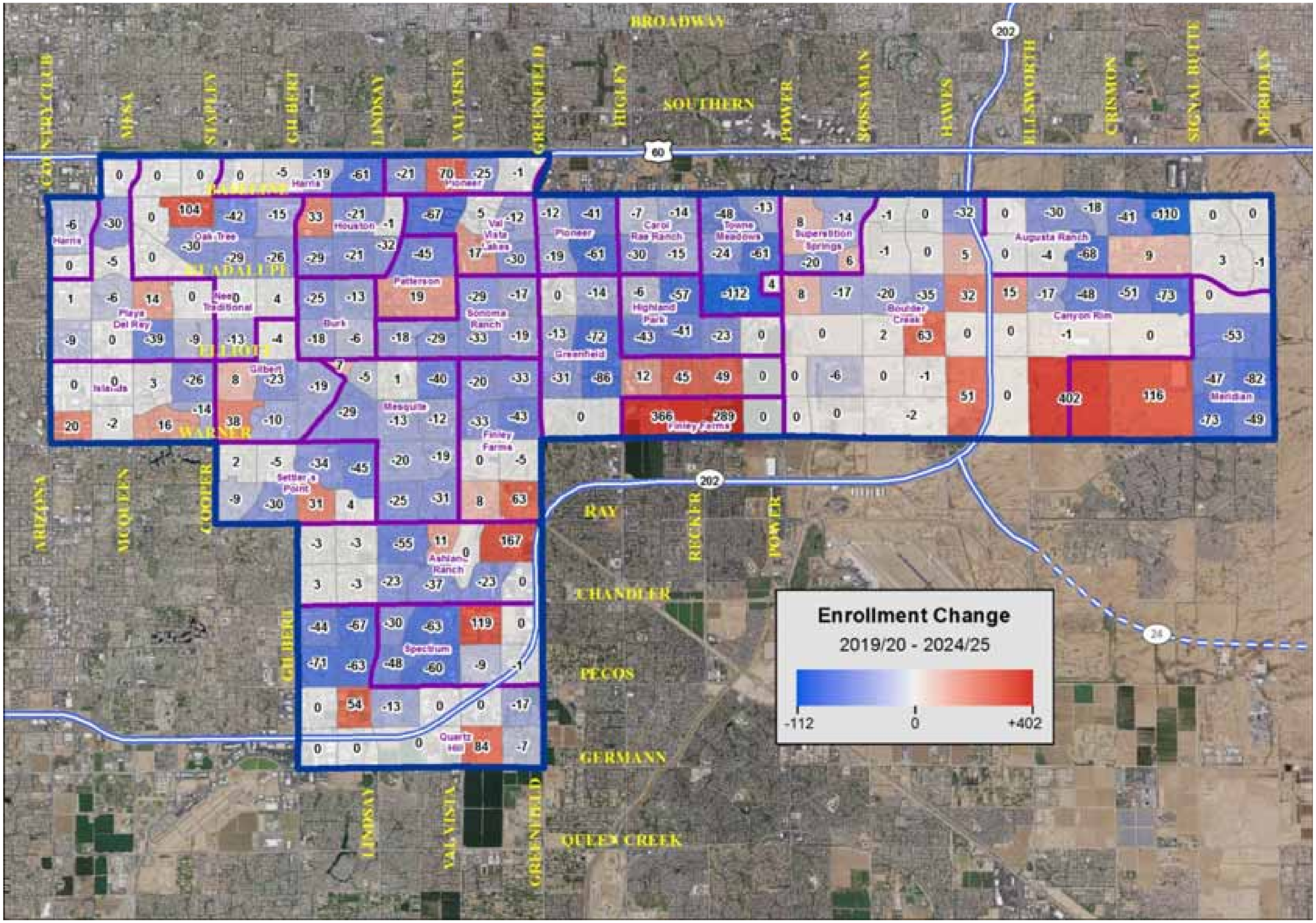
The grid-level projections are then aggregated by attendance area and used to cross-check the District enrollment projections. Matrices showing the relationship between where students live and where they attend school are provided for each elementary, middle and high school attendance area. Finally,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

5.1 PLANNING GRID PROJECTIONS

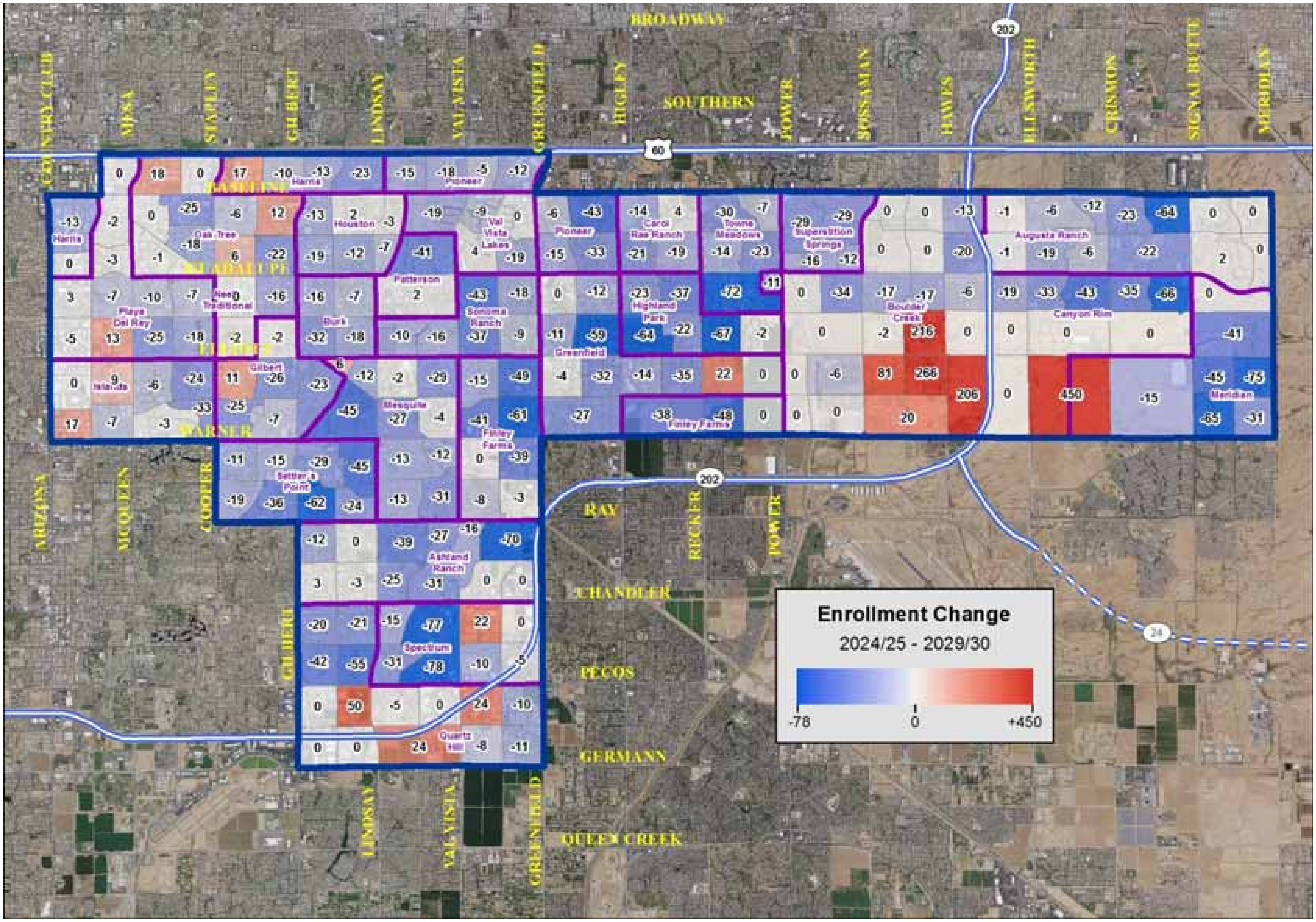
The projected changes in the number of students by grid over the next two five-year periods are depicted on **Maps 10 and 11**. The planning grids are color coded according to the degree of change, with increasing saturations of red for positive change and blue for negative change.

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 and Eastmark. Although there are some pockets of strong 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
PROJECTED ENROLLMENT CHANGE BY GRID: 2019/20 – 2024/25



MAP 11
PROJECTED ENROLLMENT CHANGE BY GRID: 2024/25 – 2029/30



5.2 ENROLLMENT BY ATTENDANCE AREA VERSUS SCHOOL

The school attendance areas used to aggregate the planning grid-level projections for the District are shown on **Maps 12** and **13**, representing the elementary and secondary attendance areas, respectively.

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 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 559 students attending Ashland Ranch who reside in the Ashland Ranch attendance area, 2 students who resides in the Boulder Creek attendance area, 1 from the Burk attendance area, 4 from the Finley Farms attendance area, 5 from the Gilbert attendance area, 4 from the Greenfield attendance area, and so on.

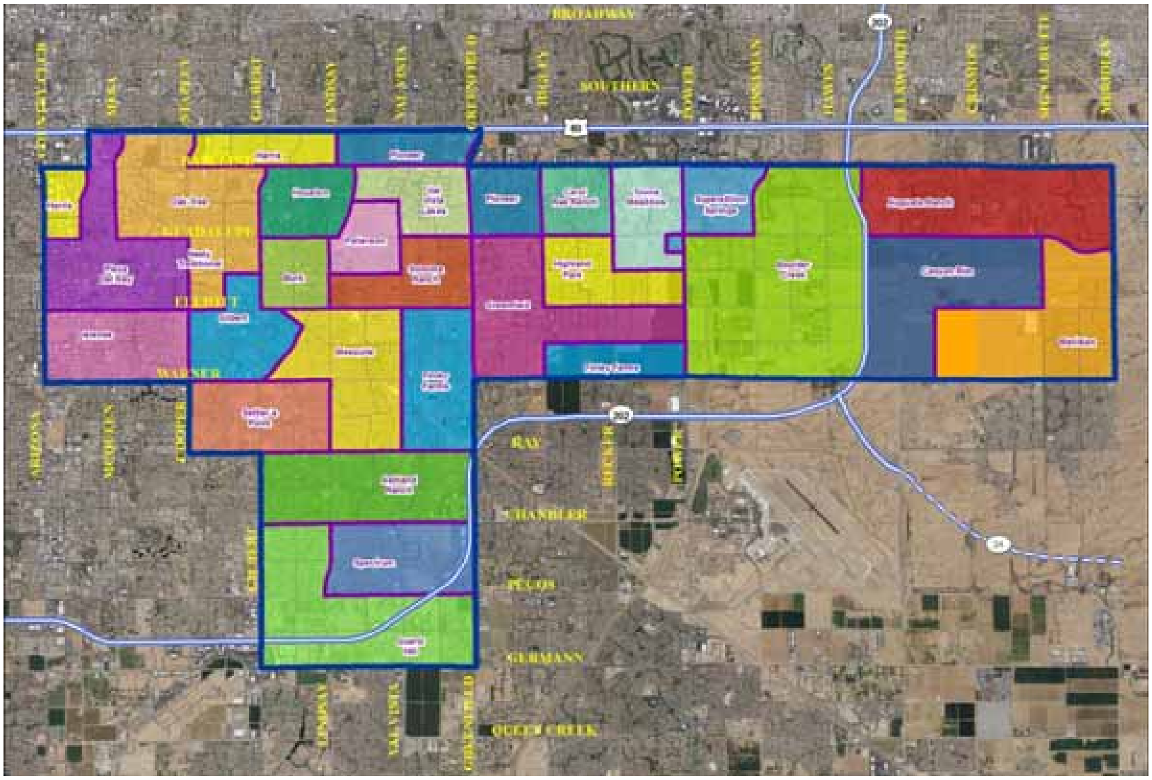
The number of students attending from outside the District is listed, along with the total number of students who attend the school and the total number of District students residing in the attendance area. The *Net Difference* column is calculated by subtracting the *Total Reside* from the *Total Attendance*. 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 that cause the differences between enrollment by attendance area and enrollment by school. The matrix shows that of the 14,120 resident students attending District elementary schools, 75.2 percent attend the school designated by the attendance area in which they reside; Meridian and Superstition Springs retained the highest share of resident students (87 percent each) and Gilbert had the lowest share (51 percent). Quartz Hill has the largest net import of students (258), followed closely by Patterson (249). Six other schools had net imports of more than 100 students each. Of the 313 students attending Quartz Hill who do not reside in the attendance area, 217 reside outside District boundaries, which is the most of any elementary school by a large margin. Five schools have a net export of students, the largest of which is Boulder Creek, where 301 students who reside in the attendance area attend a different elementary school within the District; this year, 127 elementary students residing in the Boulder Creek attendance area chose to attend Superstition Springs Elementary instead. Neely Traditional does not have a defined attendance area, but draws students from every other attendance area. Overall, the District attracts more than 2,400 elementary students from outside its boundaries.

The movement of District middle and high school students between residence and school of attendance is summarized in **Table 17.** At the middle school level, 84.9 percent of resident students attend their designated school. Of the schools with defined attendance areas, South Valley Junior High School had the highest net import of students (291), followed closely by Highland Junior High (273). Of Highland Junior High's 1,006 resident students, 90.4 percent choose to attend the school, while only 60.6 percent of Mesquite's resident students chose to attend the school. Desert Ridge has the highest out-of-District enrollment among the junior high schools (208 students), and four other middle schools each enroll more than 100 out-of-District students. Mesquite Junior High is currently the only junior high school experiencing a net export, with 339 fewer students attending the school than residing in the attendance area. Overall, the District attracted 746 junior high students from outside its boundaries.

Of the District's 10,189 resident high school students, 8,221 (80.7 percent) attend the school associated with their attendance area. Highland High School had the largest net enrollment gain (686 students) among high schools with defined attendance areas, due in large part to the addition of 428 out-of-District students. Desert Ridge High School also experienced a net enrollment gain (473 students), but it was due entirely to the addition of 600 out-of-District students; of the 2,144 students that reside in the Desert Ridge attendance area, 1,928 also attended the school but 140 other resident students chose to attend Highland High School instead. Mesquite had a net enrollment loss of 164 students this year, despite enrolling 275 out-of-District students. In total, the District attracts nearly 2,100 high school students from outside of the District's boundaries. Across all of the grade levels, nearly 79 percent of resident students chose to attend the school associated with their attendance area of residence in 2019/20.

MAP 12
2019/20 ELEMENTARY ATTENDANCE AREAS



MAP 13
2019/20 SECONDARY ATTENDANCE AREAS

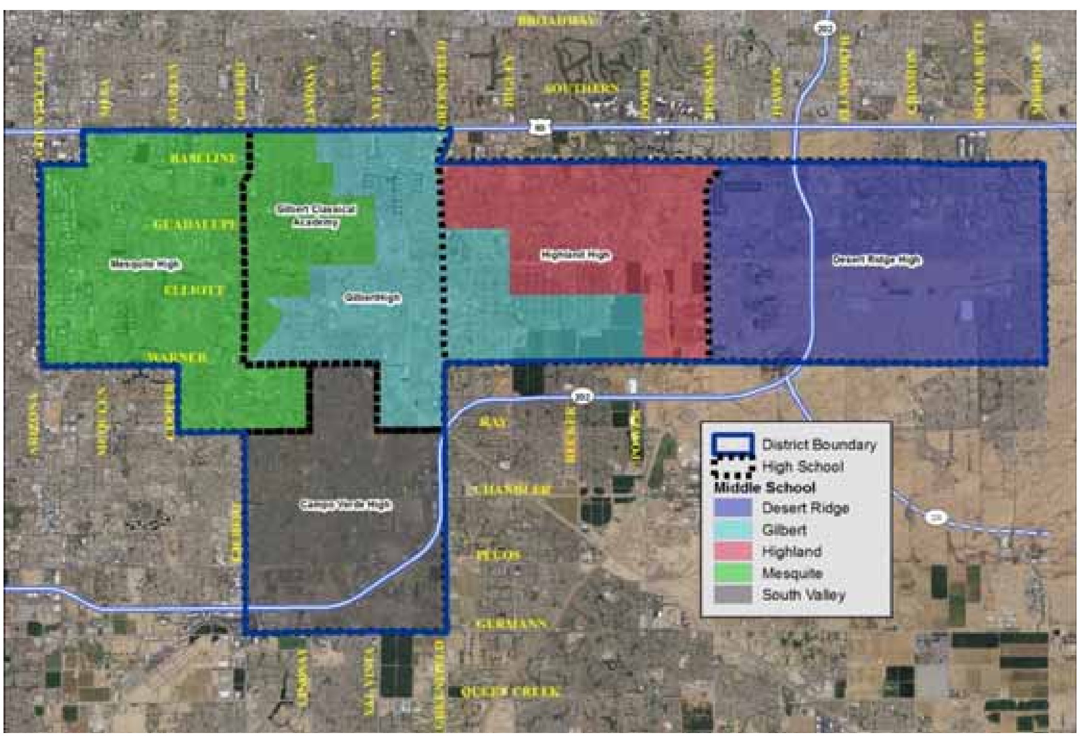


TABLE 16
ELEMENTARY ENROLLMENT BY SCHOOL VERSUS BY ATTENDANCE AREA

		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
Ashland Ranch	1	559		2	1			4	5	4	3	3		3	2	42	3		2		6	19	2	12		2		94	768	672	96
Augusta Ranch	2	1	709	20		27						2			17								1		3	4		163	947	830	117
Boulder Creek	3	1	13	422		17	2		1	2					5		2								5	6		56	532	724	-192
Burk	4	3		1	202	3	1		18		11	1	11	4	1	6	16	3	2	3		1	7	3	2	1	3	46	349	313	36
Canyon Rim	5		36	27		560	2					1			22				3						2			93	746	670	76
Carol Rae Ranch	6	2	1	24		2	337	3		7	1	7			2	1	1	1	20			2		1	4	32		58	506	426	80
Finley Farms	7	9		1	1	4		464	2	8		3	1	1	1	17	4	7			1	7	12	1			4	94	642	598	44
Gilbert	8	12			24	1	3	11	217	1	11	5	9	15	1	15	16	5	8	9	1	13	5	2	1	3	2	124	514	422	92
Greenfield	9	5		9	6			33	6	826	1	10		1	1	7		2	7		2	1	18	2	3	4	4	80	1,028	1,001	27
Harris	10	1			1				2		315	3	5	3			4		2	2			2				2	102	444	459	-15
Highland Park	11	2	6	24		2	13	12	3	75		530	1		1	4		1	18			1	7	2	4	25	2	107	840	635	205
Houston	12	1		4	6	1			3		23		199	3	2	1	10		3	1	1	3	2	1	1		2	65	332	323	9
Islands	13						1	1	18	2	10	2	2	354	4	3	12	1		26		18			1	1	2	113	571	446	125
Meridian	14		14	7		16	3	1			1				535			1							2	1	2	100	683	615	68
Mesquite	15	2	2		2	1	3	1	6	1		4	3	1	3	474	3	1		1	4	2	7	6	1	2	2	58	590	745	-155
Oak Tree	16	2	1	2	6		1		10		14	2	3	7	1	6	309	2	5	8		6	5				4	76	470	568	-98
Patterson	17	7	1	7	17	6	3	1	10	9	11	8	43	2	2	16	15	276	9	7		6	25	2	4	7	15	82	591	342	249
Pioneer	18	7	8	5	3	1	14	3		3	3	3	2	1	5	5	1	3	367	1	1	2	5	2	4	4	4	84	541	493	48
Playa Del Rey	19	2	1		5			1	15		17		5	14	2	2	15	2		286		8	3	4				58	440	411	29
Quartz Hill	20	11		5	1	1		5	3			1				8				3	262	10	1	46		1		217	575	317	258
Settler's Point	21	6	2		2	1	1	5	18	4	1	1	3	1	2	43	5	1	1	1	4	460	1	6		1	1	38	609	618	-9
Sonoma Ranch	22	4	2	1	3		4	6	1	11	8	3	3			13	3	4	7	1	1	5	303	12	3	10	8	42	458	434	24
Spectrum	23	19	1		3			2			1	1		1		12				3	6	6	3	473			3	84	618	598	20
Superstition Springs	24		9	127		9	7			1		3	1		1	1			1				1		455	16	3	105	740	522	218
Towne Meadows	25	4	14	21	1	9	13	7	2	9	3	22	1	3	4	3	5	4	1	2	2	1	2	4	17	406	3	105	668	543	125
Val Vista Lakes	26		3	5	8	2	4	2	3	9	10		12			11	5	20	18		1	7	4	4	4	2	321	63	518	395	123
Neely Traditional		12	4	9	20	4	13	34	78	29	14	19	18	31		51	138	8	18	57	23	40	17	13	6	15	8	101	780	0	780
Other		0	3	1	1	3	1	2	1	0	1	1	1	1	1	4	1	0	1	0	2	0	1	2	0	0	0	2	30	0	30
Total Reside		672	830	724	313	670	426	598	422	1,001	459	635	323	446	615	745	568	342	493	411	317	618	434	598	522	543	395	2,410	16,530	14,120	2,410
Reside/Atttend Same		83%	85%	58%	65%	84%	79%	78%	51%	83%	69%	83%	62%	79%	87%	64%	54%	81%	74%	70%	83%	74%	70%	79%	87%	75%	81%			10,621	75.2%

Sources: Gilbert Public Schools; Applied Economics, 2020.

TABLE 17
SECONDARY ENROLLMENT BY SCHOOL VERSUS BY ATTENDANCE AREA

MIDDLE SCHOOL

School		Attendance Area 1	2	3	4	5	Out of District	Total Attendance	Total Reside	Net Difference
Desert Ridge Junior High School	1	869	2	17	4		208	1,100	968	132
Greenfield Junior High School	2	8	747	43	139	16	103	1,056	1,013	43
Highland Junior High School	3	65	135	909	33	9	128	1,279	1,006	273
Mesquite Junior High School	4	1	31	2	765	13	112	924	1,263	-339
South Valley Junior High School	5	3	29	4	204	658	128	1,026	735	291
Gilbert Classical Academy		13	54	25	108	35	60	295	0	295
Gilbert Global Academy		3	4	2	3	1		13	0	13
Other		6	11	4	7	3	7	38	0	38
Total Reside		968	1,013	1,006	1,263	735	746	5,731	4,985	746
Reside/Atttend Same (In-District)		89.8%	73.7%	90.4%	60.6%	89.5%		4,232	84.9%	

HIGH SCHOOL

School		Attendance Area 1	2	3	4	5	Out of District	Total Attendance	Total Reside	Net Difference
Campo Verde High School	1	1,385	11	68	20	279	356	2,119	1,546	573
Desert Ridge High School	2	1	1,928	7	76	5	600	2,617	2,144	473
Gilbert High School	3	66	8	1,482	113	172	312	2,153	2,175	-22
Highland High School	4	13	140	397	2,330	33	428	3,341	2,655	686
Mesquite High School	5	36	6	82	10	1,096	275	1,505	1,669	-164
Gilbert Classical Academy		31	18	101	73	61	101	385	0	385
Gilbert Global Academy		10	12	25	19	15	21	102	0	102
Other		4	21	13	14	8	1	61	0	61
Total Reside		1,546	2,144	2,175	2,655	1,669	2,094	12,283	10,189	2,094
Reside/Atttend Same (In-District)		89.6%	89.9%	68.1%	87.8%	65.7%		8,221	80.7%	

In-District Students (K-12)	Reside/Atttend Same (In-District)	23,074	78.8%

Sources: Gilbert Public Schools; Applied Economics, 2020.

5.3 ATTENDANCE AREA AND SCHOOL PROJECTIONS

Table 18 shows elementary enrollment by attendance area for the past five school years, as well as projections through 2029/30 based on the Mid-Point projection 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.

By 2029/30, the District is projected to experience a loss of nearly 800 elementary students, all of which is expected to occur in the second five-year period. This 10-year net loss is partially offset by a nearly 200-student increase in out-of-District enrollment, all of which is expected to occur in the first half of the projection period. This is a notable distinction because of the 1,000-student decrease in K-6 enrollment between 2014/15 and 2019/20 about 33 percent (327 students) of the enrollment drop was due to a loss of out-of-District students.

During the first half of the projection period, 19 of the 26 elementary attendance areas are projected to experience some degree of enrollment decline. These declines are somewhat offset by gains in the remaining attendance areas, particularly the Finley Farms (+254 students) attendance area, resulting in a net loss of 190 in-District K-6 students for the period; with the addition of roughly 270 new out-of-District students, however, total enrollment is projected to increase by about 80 students by 2024/25. In the second half of the projection period, all but two attendance areas are expected to decline, resulting in a loss of 750 in-District K-6 students for the period; the only gains during this period are in the Boulder Creek (+320 students) and Meridian (+85 students) attendance areas. Out-of-District enrollment is also projected to decrease by roughly 100 students during this period, resulting in a net decrease of another 850 K-6 students by 2029/30.

Ten-year enrollment projections for the junior and high school attendance areas are shown on **Table 19**. District junior high school attendance area enrollment is expected to decline by about 1,000 students over the next ten years; the majority of these losses (75 percent) are expected to occur during the first five-year period. By 2029/30, the largest enrollment declines are expected in the Highland (-330 students), Mesquite (-250 students) and South Valley (-210 students) attendance areas; out-of-District enrollment is expected to decline during the first five-year period and then rebound in the second, ending the period down just slightly in 2029/30.

Over the initial five years, all of the junior high attendance areas are projected see enrollment declines, with losses ranging from about 40 students (Greenfield) to nearly 230 students (Highland). Including a slight decline in out-of-District enrollment, enrollment is expected to decline by about 750 students by 2024/25. In the second half of the projection period, junior high school enrollment losses are projected to continue but moderate somewhat; an enrollment increase in the Desert Ridge Junior High attendance area (+80 students) and slight increase in out-of-District enrollment is projected to partially offset losses in the remaining attendance, resulting in a net decrease of another 260 students for the period.

Significant enrollment declines are projected for the 10-year period at the high school level, particularly in the second half of the period. Declines in every attendance area and in out-of-District enrollment are expected to result in the loss of 1,600 high school students by 2029/30. All of the attendance areas, except Desert Ridge High (-50 students), are expected to experience losses of 300 or more students by the end of the period; the largest 10-year loss is projected for the Gilbert High attendance area (-570 students).

During the first five-year period, an enrollment increase in the Highland High (+70 students) attendance area is expected to partially offset losses in the remaining attendance areas; the largest loss during this period is projected for the Gilbert High attendance area (-220 students). The projected in-District enrollment losses combine with a 50-student decrease in out-of-District 9-12 enrollment to yield a net loss of 560 high school students by 2024/25. During the second half of the projection period, out-of-District enrollment is expected to increase slightly (70 students), but in-District enrollment losses are projected to accelerate; only the Desert Ridge High attendance area is projected to see a gain of about 110 students during this period. The largest decrease during the second five-year period is forecast for the Highland High (430 students) attendance area. A net loss of 1,120 in-District students combined with the increase in out-of-District enrollment results in a net loss of an additional 1,050 high school students during the second half of the projection period.

TABLE 18
ELEMENTARY ENROLLMENT PROJECTIONS BY ATTENDANCE AREA
MID-POINT FORECAST

	Actual																2014-	2019-	2024-
	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2019	2024	2029
Ashland Ranch	668	649	632	674	647	672	693	677	682	704	682	676	651	634	615	591	4	10	-91
Augusta Ranch	886	882	889	906	880	830	832	795	792	811	802	790	781	772	758	740	-56	-28	-62
Boulder Creek	646	595	669	668	673	724	755	753	751	775	820	910	954	1,028	1,091	1,141	78	96	321
Burk	378	404	370	319	312	313	295	291	276	276	277	270	270	267	263	258	-65	-36	-19
Canyon Rim	768	729	743	772	705	670	732	762	739	752	708	725	726	741	715	682	-98	38	-26
Carol Rae Ranch	456	460	473	449	440	426	426	416	414	408	407	417	415	407	399	389	-30	-19	-18
Finley Farms	587	601	603	603	624	598	619	664	795	837	852	825	807	783	754	723	11	254	-129
Gilbert	441	429	443	411	410	422	415	417	429	431	428	433	421	414	406	395	-19	6	-32
Greenfield	722	748	826	915	948	1,001	991	967	946	942	927	904	887	874	843	808	279	-74	-119
Harris	461	538	501	497	467	459	450	444	448	443	447	441	438	431	426	414	-2	-12	-33
Highland Park	771	735	744	701	674	635	599	570	549	537	529	520	510	499	486	471	-136	-106	-59
Houston	367	352	341	331	328	323	316	336	337	337	340	340	334	329	325	316	-44	17	-23
Islands	490	450	418	416	436	446	441	437	431	431	440	425	423	417	411	400	-44	-6	-41
Meridian	778	734	712	713	655	615	648	618	596	570	613	676	717	719	720	698	-163	-2	85
Mesquite	739	754	709	726	711	745	731	695	690	687	680	667	642	624	604	580	6	-65	-100
Oak Tree	689	646	598	595	595	568	575	611	612	642	647	648	637	629	623	607	-121	79	-40
Patterson	347	341	352	364	346	342	329	329	332	330	325	322	320	317	312	305	-5	-17	-19
Pioneer	463	441	463	452	494	493	478	458	435	428	470	463	451	444	436	424	30	-23	-45
Playa Del Rey	445	495	428	427	422	411	403	399	389	396	390	394	390	385	382	373	-34	-21	-17
Quartz Hill	449	418	370	368	347	317	338	310	289	310	295	292	310	302	291	284	-132	-22	-11
Settler´s Point	646	613	586	590	640	618	583	599	595	598	576	563	532	510	486	459	-28	-42	-117
Sonoma Ranch	479	476	434	446	441	434	425	407	381	379	373	360	356	348	339	328	-45	-61	-45
Spectrum	655	638	654	632	595	598	577	562	540	554	538	544	522	511	496	482	-57	-60	-56
Superstition Springs	534	525	525	510	501	522	509	513	499	504	501	505	497	494	488	479	-12	-21	-22
Towne Meadows	527	564	582	599	555	543	510	491	494	490	486	492	481	476	469	458	16	-57	-28
Val Vista Lakes	408	410	412	414	389	395	391	390	382	389	379	389	382	380	376	370	-13	-16	-9
Out of District	2,737	2,256	2,152	2,083	2,233	2,410	2,509	2,584	2,645	2,692	2,682	2,682	2,638	2,629	2,614	2,586	-327	272	-96
Total	17,537	16,883	16,629	16,581	16,468	16,530	16,573	16,496	16,466	16,651	16,612	16,671	16,491	16,362	16,131	15,762	-1,007	82	-850

Source: Applied Economics, 2020.

TABLE 19
SECONDARY ENROLLMENT PROJECTIONS BY ATTENDANCE AREA
MID-POINT FORECAST

	Actual																2014-	2019-	2024-
	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2019	2024	2029
JUNIOR HIGH																			
Desert Ridge Junior High	1,169	1,108	1,089	1,061	1,036	968	962	940	895	814	859	930	916	952	959	943	-201	-109	84
Gilbert Junior High	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Greenfield Junior High	1,019	960	942	956	941	1,013	959	976	1,057	997	976	960	926	909	880	845	-6	-37	-131
Highland Junior High	1,000	961	937	926	950	1,006	963	889	834	791	779	751	712	717	698	672	6	-227	-107
Mesquite Junior High	1,337	1,346	1,252	1,288	1,316	1,263	1,223	1,232	1,160	1,116	1,084	1,088	1,100	1,080	1,047	1,010	-74	-179	-74
South Valley Junior High	806	817	778	751	732	735	725	686	669	599	572	590	575	570	542	521	-71	-163	-51
Out of District	860	732	712	675	698	746	737	700	692	667	712	749	761	773	745	735	-114	-34	24
Total	6,191	5,924	5,710	5,657	5,673	5,731	5,570	5,422	5,307	4,983	4,982	5,068	4,989	5,001	4,871	4,726	-460	-749	-256
HIGH SCHOOL																			
Campo Verde High	1,628	1,648	1,664	1,569	1,531	1,546	1,590	1,616	1,585	1,556	1,489	1,357	1,318	1,239	1,195	1,203	-82	-57	-286
Desert Ridge High	2,259	2,293	2,288	2,261	2,244	2,144	2,250	2,232	2,128	2,059	1,984	1,946	2,005	2,011	2,042	2,097	-115	-160	112
Gilbert High	2,627	2,596	2,494	2,324	2,230	2,175	2,140	2,136	2,079	2,014	1,956	1,851	1,801	1,713	1,644	1,602	-452	-219	-353
Highland High	2,419	2,529	2,526	2,573	2,601	2,655	2,770	2,803	2,848	2,818	2,728	2,581	2,509	2,406	2,338	2,294	236	73	-433
Mesquite High	2,108	2,090	1,953	1,849	1,767	1,669	1,645	1,634	1,622	1,596	1,524	1,469	1,418	1,380	1,380	1,364	-439	-145	-160
Out of District	1,760	1,661	1,758	1,728	1,838	2,094	2,048	2,031	2,049	2,059	2,044	1,984	2,015	2,016	2,057	2,111	334	-50	67
Total	12,801	12,817	12,683	12,304	12,211	12,283	12,443	12,453	12,311	12,102	11,725	11,189	11,065	10,764	10,656	10,672	-518	-558	-1,053

Source: Applied Economics, 2020.

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 20 and 21** reflect the same pattern of change as the attendance areas, therefore no further description of these results is provided.

TABLE 20
ELEMENTARY ENROLLMENT PROJECTIONS BY SCHOOL
MID-POINT FORECAST

	Actual																2014-	2019-	2024-
	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2019	2024	2029
SCHOOLS *																			
Ashland Ranch	752	735	732	787	787	768	791	780	799	810	780	783	759	743	725	700	16	12	-80
Augusta Ranch	997	936	942	980	948	947	963	932	927	952	933	920	903	886	864	837	-50	-14	-97
Boulder Creek	648	622	635	574	556	532	525	498	472	476	512	599	652	736	809	868	-116	-20	356
Burk	447	426	394	344	355	349	336	339	327	334	343	334	331	325	319	310	-98	-6	-33
Canyon Rim	888	794	777	781	779	746	817	854	835	843	802	796	786	794	762	721	-142	56	-81
Carol Rae Ranch	570	556	581	527	531	506	510	505	510	501	497	503	498	489	480	467	-64	-9	-30
Finley Farms	745	711	682	649	662	642	662	712	852	898	920	891	867	837	801	760	-103	278	-160
Gilbert	572	534	511	496	480	514	528	546	559	569	573	571	554	549	542	532	-58	59	-41
Greenfield	688	749	804	918	959	1,028	1,022	995	974	968	950	935	919	909	880	847	340	-78	-103
Harris	462	467	440	444	428	444	422	402	403	402	407	408	407	403	400	389	-18	-37	-17
Highland Park	895	858	885	865	856	840	831	823	810	798	783	775	757	740	721	698	-55	-57	-85
Houston	440	407	386	348	336	332	327	358	368	380	387	395	387	379	372	360	-108	55	-27
Islands	597	555	498	509	538	571	571	573	571	571	582	563	556	546	535	519	-26	11	-63
Meridian	966	846	829	799	730	683	726	698	685	663	703	771	806	803	799	770	-283	20	67
Mesquite	599	612	561	578	578	590	564	530	524	511	503	498	477	466	452	433	-9	-87	-71
Neely Traditional	814	810	762	783	802	780	763	758	751	751	745	740	748	757	766	774	-34	-35	29
Oak Tree	657	608	541	535	499	470	441	438	418	433	417	410	407	406	410	404	-187	-53	-13
Patterson	569	564	550	561	565	591	582	588	598	605	595	585	578	570	560	549	22	4	-45
Pioneer	501	497	527	508	534	541	527	510	489	486	536	524	513	507	500	489	40	-5	-46
Playa Del Rey	485	491	460	433	421	440	445	451	444	457	465	481	472	464	457	445	-45	25	-20
Quartz Hill	709	658	620	645	639	575	618	596	589	618	608	608	618	606	590	578	-134	33	-31
Settler´s Point	608	574	586	579	625	609	592	617	619	638	619	618	587	566	542	517	1	10	-103
Sonoma Ranch	480	452	427	438	440	458	469	463	448	454	437	425	422	417	410	403	-22	-21	-34
Spectrum	670	618	623	578	580	618	603	595	583	596	587	593	575	568	556	544	-52	-31	-42
Superstition Springs	653	641	670	696	700	740	742	756	758	775	774	775	760	750	738	723	87	34	-51
Towne Meadows	615	643	677	688	622	668	630	611	591	594	596	604	593	588	582	573	53	-72	-23
Val Vista Lakes	502	504	520	515	497	518	535	534	532	538	530	537	531	529	526	521	16	12	-9
Other	8	15	9	23	21	30	30	31	30	30	29	30	30	30	31	32	22	-1	3
Total	17,537	16,883	16,629	16,581	16,468	16,530	16,573	16,496	16,466	16,651	16,613	16,671	16,491	16,362	16,131	15,762	-1,007	83	-850

Source: Applied Economics, 2020.

* Based on the past and current difference between attendance area and school enrollment.

TABLE 21
SECONDARY ENROLLMENT PROJECTIONS BY SCHOOL
MID-POINT FORECAST

	Actual																		
	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2014-2019	2019-2024	2024-2029
JUNIOR HIGH*																			
Desert Ridge Junior High	1,374	1,288	1,296	1,242	1,182	1,100	1,034	1,002	952	872	881	931	935	961	957	942	-274	-219	61
Gilbert Junior High	535	506	444	0	0	0	0	0	0	0	0	0	0	0	0	0	-535	0	0
Greenfield Junior High	915	834	855	911	900	1,056	1,054	1,011	1,006	932	932	921	884	868	827	786	141	-124	-147
Highland Junior High	1,265	1,232	1,208	1,221	1,269	1,279	1,251	1,220	1,204	1,135	1,148	1,178	1,165	1,177	1,155	1,133	14	-131	-14
Mesquite Junior High	711	661	607	995	969	924	859	870	852	809	803	816	801	797	760	714	213	-121	-89
South Valley Junior High	1,192	1,156	1,075	1,022	1,047	1,026	1,045	991	965	907	889	894	875	868	843	822	-166	-137	-67
Gilbert Classical Academy	189	224	217	241	271	295	285	287	287	287	287	287	287	287	287	287	106	-8	0
Other	10	23	8	25	35	51	42	42	42	42	42	42	42	42	42	42	41	-9	0
Total	6,191	5,924	5,710	5,657	5,673	5,731	5,570	5,422	5,307	4,983	4,982	5,068	4,989	5,001	4,871	4,726	-460	-749	-256
HIGH SCHOOL*																			
Campo Verde High	2,071	2,053	2,109	2,042	2,059	2,119	2,157	2,172	2,165	2,143	2,082	1,950	1,928	1,862	1,837	1,864	48	-37	-218
Desert Ridge High	2,659	2,727	2,824	2,839	2,832	2,617	2,626	2,522	2,356	2,279	2,194	2,139	2,204	2,208	2,244	2,304	-42	-423	110
Gilbert High	2,416	2,385	2,317	2,157	2,130	2,153	2,152	2,180	2,147	2,075	2,007	1,887	1,840	1,750	1,685	1,649	-263	-146	-358
Highland High	3,022	3,053	3,053	3,150	3,143	3,341	3,496	3,554	3,628	3,584	3,477	3,305	3,238	3,133	3,071	3,037	319	136	-440
Mesquite High	1,977	1,900	1,862	1,701	1,546	1,505	1,439	1,438	1,430	1,438	1,381	1,322	1,267	1,223	1,230	1,229	-472	-124	-152
Gilbert Classical Academy	274	292	314	315	335	385	398	411	408	406	406	406	406	406	406	406	111	21	0
Other	382	407	204	100	166	163	174	176	176	177	178	180	182	183	183	183	-219	15	5
Total	12,801	12,817	12,683	12,304	12,211	12,282	12,443	12,453	12,311	12,102	11,725	11,189	11,065	10,764	10,656	10,672	-518	-558	-1,053

Source: Applied Economics, 2020.
* Based on the current difference between attendance area and school enrollment.

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Stephanie Bubenheim
Planner II
Town of Gilbert

Jeff Gunderson
Senior Vice President of Land Development
Lennar Homes

Norm Nicholls
President
Fulton Homes

Jason Weber
Vice President of Land Acquisition & Development
Maracay Homes

Builder
Pulse Newsletter

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New Apartment Construction

Maricopa Association of Governments
Information Services

Maricopa County Assessor's Office
Maricopa County, AZ

Phoenix Business Journal
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Rose Law Group
Rose Law Group Reporter