GILBERT PUBLIC SCHOOLS
DEMOGRAPHIC & ENROLLMENT ANALYSIS
2021/22

Final Report

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Executive Summary

The 2021/22 demographic and enrollment update for the Gilbert Unified School District (District) incorporates new data for the District and its sub-areas, as well as information regarding changes in regional socioeconomic conditions. The purpose of this analysis is to identify current and historic demographic, development and enrollment trends, and to anticipate future trends to create District and sub-District enrollment projections through 2031/32.

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

• Total K-12 enrollment in the District was 33,432 students in the fall of the 2021/22 school year, representing a one percent increase (roughly 280 students) over last year; K-12 enrollment, however, remains three percent (1,100 students) below total 2019/20 (pre-pandemic) enrollment. In-District enrollment dropped by nearly six percent (nearly 1,700 students) in the 2020/21 school year due to the anomalous effects of the pandemic. Although in-District enrollment increased slightly this year (0.7 percent or 184 students), last year's COVID-related drop exacerbated the trend of declining in-District enrollment, which has decreased by nearly 11 percent (3,300 students) since 2014/15.

• The 5,640 out-of-District students that were enrolled in 2021/22 came from more than 15 metro area school districts. However, 61 percent of the out-of-District students came from the Mesa Unified School District (more than 2,300 K-12 students) and Higley Unified School District (over 1,100 K-12 students). The increase in out-of-District students this year (99 students) accounted for nearly 35 percent of the overall increase in 2021/22 total enrollment.

• Demographic data indicates a general aging of the District's population. Between 2000 and 2020, the share of the population under 5 years of age fell from 10.0 percent of the total population to 6.4 percent. Along with the aging of the existing population, this drop is indicative of the sharp decline in birth rates that accompanied the recession. At about 23 percent, the share of the school-age population (5 to 17 years of age) remained relatively unchanged from 2000 to 2010, but it has fallen to roughly 20 percent over the past 10 years. Those in the 25 to 44 age group, which is typically most closely correlated with having young children, constituted about 36 percent of the total population in 2000 but fell to nearly 29 percent in both 2010 and 2020. Meanwhile, the population over 44 years of age has grown significantly faster than all of the other age cohorts over the past 20 years, thereby increasing the share of this age group from about 23 percent in 2000 to 37 percent of the total population in 2020.

• There are currently 13 charter schools located within the District serving 7,200 K-12 students, and there are an additional 26 charter schools operating within one mile of District boundaries that serve another 12,200 K-12 students. Since 2010/11, total local charter enrollment has doubled, increasing by more than 9,700 K-12 students; the majority of that increase (84 percent) has occurred in charter schools located just outside of the District's boundaries. It is clear that charter enrollment growth has compounded the issue of aging-in-place that is occurring throughout the District and has contributed to the waning enrollment at both the elementary and high school level. Charter enrollment in grades K-8 comprises the vast majority of the 19,400 total local charter students, however, local charter schools have recently increased their 9-12 enrollment and it now accounts for 20 percent of total charter enrollment, up from roughly 14 percent in 2016/17.

• Potential housing supply additions in the District are estimated at over 14,000 units and multifamily development accounts for over 60 percent of that potential. In the near-term, new residential construction will be winding down as existing projects are completed. In the next 2 to 3 years major construction at new parcels at Eastmark and the opening of the new master plan at Hawes Crossing are forecast to start a new period of strong production levels that should last several years. In the later years of the projection period the lack of land for residential development will become an issue; single family development will decline and become limited to infill parcels, single lots, and some redevelopment. Multifamily development is forecast to remain strong over the next 10 years but it will likely have a limited impact on District enrollment.

• The difference between the District's resident school-age population and in-District enrollment has been increasing steadily; as a result, the District's "service rate" has declined by an average of 1.3 percent per year since 2014/15, dropping to 65.9 percent this year. Assuming a moderate service rate decline throughout the projection period, the District is expected to experience a loss of about 3,200 students by 2031/32 (9.6 percent), yielding total enrollment of roughly 30,200 K-12 students. Although enrollment increased slightly this year it is expected to decline in each of the next 10 years, dropping by an average of 1.0 percent per year during the projection period. The vast majority of the 10-year decline (63.5 percent) is expected to due to the loss of roughly 2,000 K-6 students.

• During the first half of the projection period, 18 of the 25 elementary attendance areas are projected to experience some degree of enrollment decline. These declines completely offset the gains in the remaining attendance areas, resulting in a net loss of 560 in-District K-6 students for the period. The largest enrollment gains are projected in the Boulder Creek (+400 students), Meridian (+200 students) and Finley Farms (+100 students) attendance areas, and the largest losses are expected in the Canyon Rim and Greenfield attendance areas (-200 students each). Alternatively, 150 new out-of-District students are expected to be added by 2026/27, although the number of students added declines each year during this period. During the second half of the projection period, enrollment at all but two of the elementary attendance areas is expected to decline, resulting in the loss of an additional 1,800 students over the five-year period; only the Boulder Creek (+400 students) attendance area is expected to experience an enrollment increase of any significance during this period. Out-of-District enrollment is also projected to decrease during the second half of the projection period, declining by about 200 students between 2026/27 and 2031/32.

• Ten-year enrollment projections for the junior and high school attendance areas are shown on Table 15. District 7-8 attendance area enrollment is expected to decline by about 450 students over the next ten years, the majority of which (77 percent) are expected to occur during the second five-year period. This enrollment decline is driven entirely by a decrease in in-District enrollment (-520 students), which is slightly offset by gain of roughly 70 out-of-District students during the same period. The largest enrollment declines over the 10-year period are expected in the Greenfield and South Valley attendance areas, both of which are expected to lose roughly 200 students by 2031/32. Desert Ridge is the only 7-8 attendance area projected to experience an increase in enrollment over the next 10 years (+150 students).

• Significant enrollment declines are projected at the high school level due to the loss of nearly 1,300 in-District 9-12 students over the next 10 years. Only the Desert Ridge attendance area is projected to experience an enrollment increase (+220 students) by 2031/32; losses in the remaining attendance areas range from 200 students (Mesquite) to 500 students (Gilbert). These losses are partially offset by a 570-student increase in out-of-District enrollment, most of which is expected to occur during the second half of the projection period.

TABLE OF CONTENTS

1.0 Introduction

The 2021/22 Demographic and Enrollment Analysis for the Gilbert Unified School District (District) incorporates information on enrollment, demographic trends, housing occupancy rates, household characteristics and residential development into 10-year District-level and small-area projections of enrollment by grade. The District-level projections use long-term demographic and housing trends for the District and projected trends for the region in a macroeconomic, top-down analysis of enrollment.

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

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

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

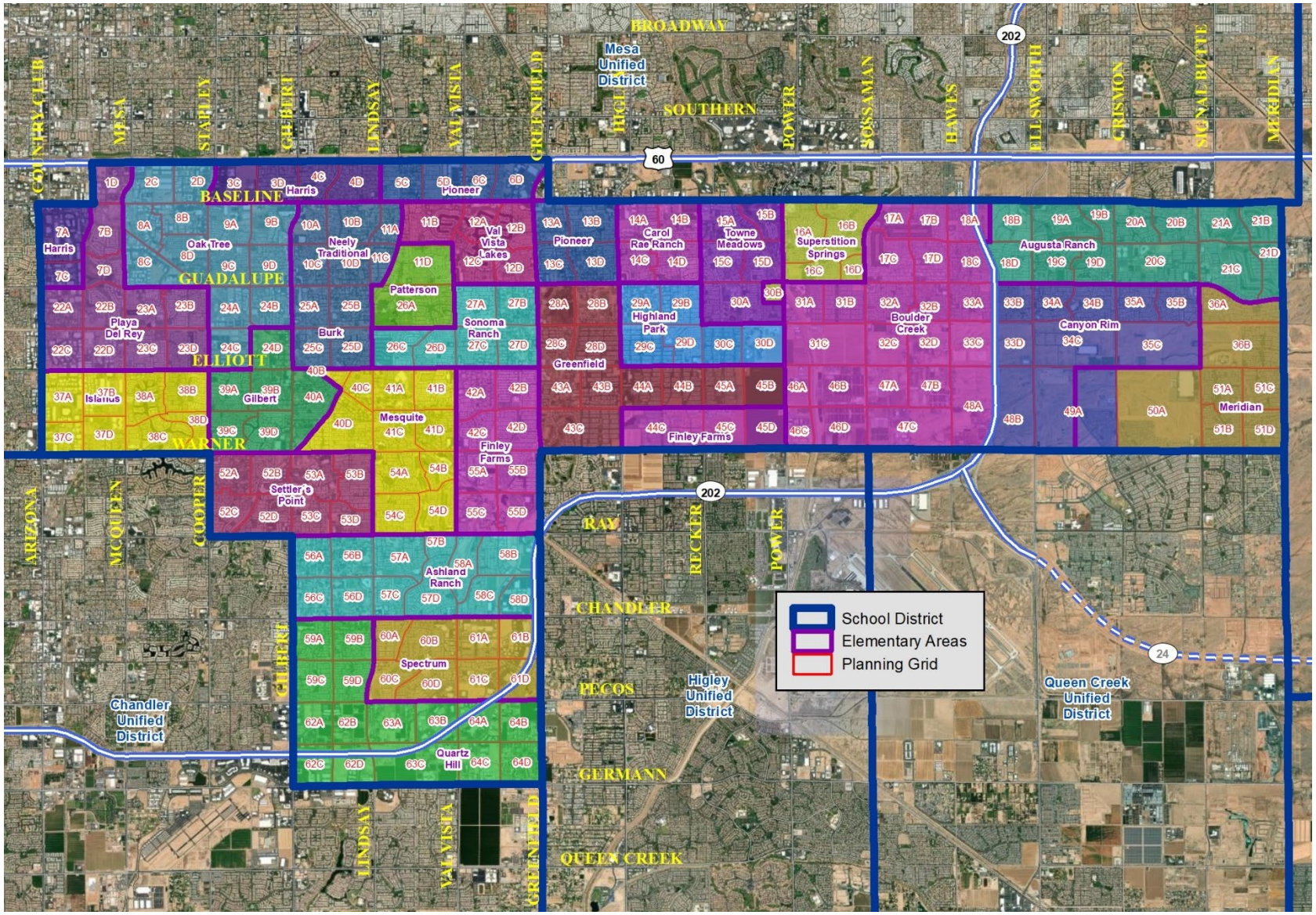
District Projections are provided in Section 4. These enrollment projections are created by combining the expected residential housing additions with the existing District population, accounting for regional and local trends in socioeconomic conditions and forecasts.

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

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

MAP 1

DISTRICT GRID PLANNING GEOGRAPHY



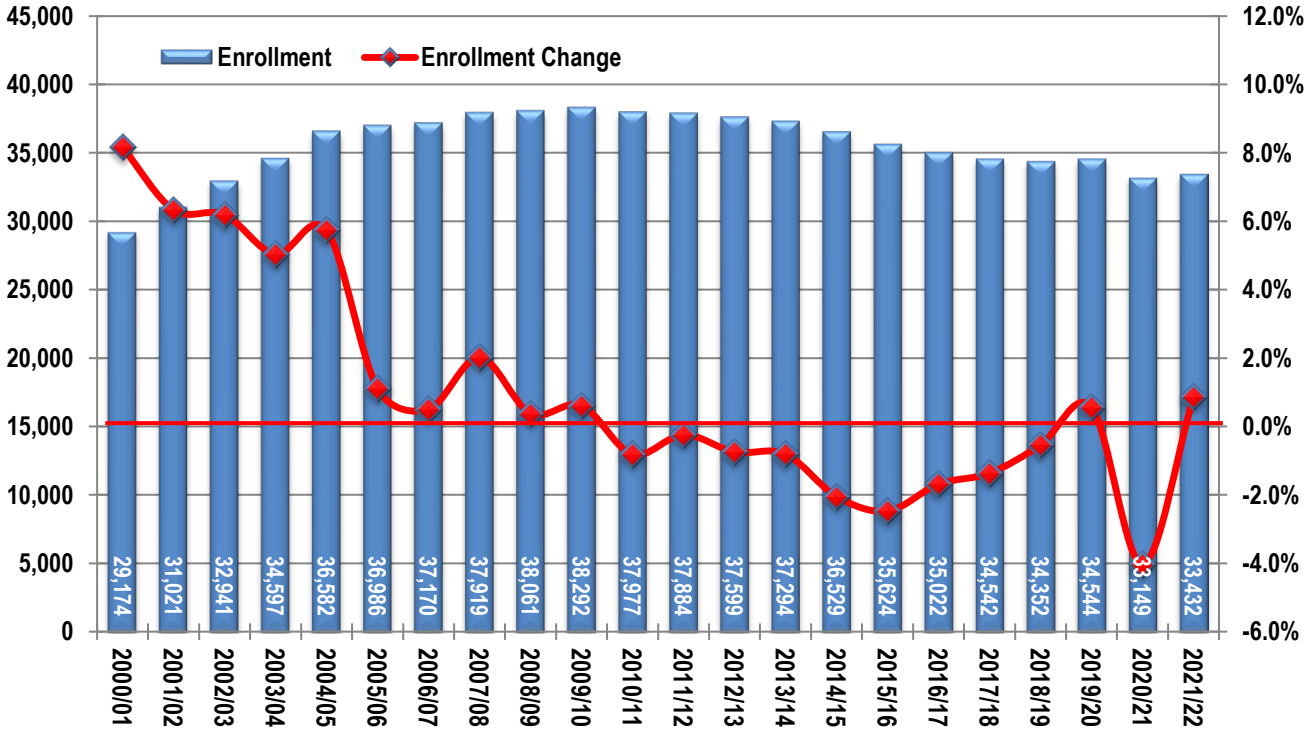
2.0 Existing Conditions

2.1 Enrollment

Total Kindergarten through 12th grade (K-12) enrollment in the District was 33,432 students in the fall of the 2021/22 school year, representing a one percent increase (roughly 280 students) over last year; K-12 enrollment, however, remains three percent (1,100 students) below total 2019/20 (pre-pandemic) enrollment.

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

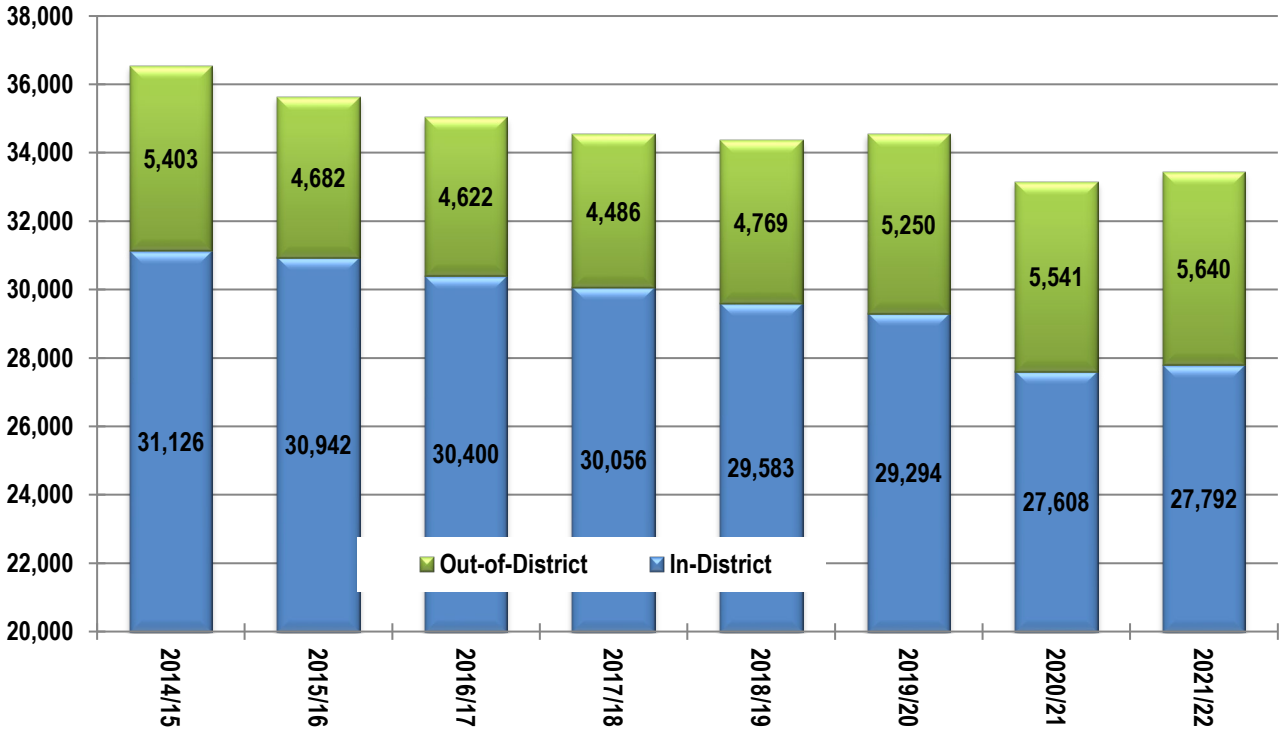
FIGURE 1
HISTORIC ENROLLMENT



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

As illustrated in **Figure 2,** in-District enrollment dropped by nearly six percent (nearly 1,700 students) in the 2020/21 school year due to the anomalous effects of the pandemic. Although in-District enrollment increased slightly this year (0.7 percent or 184 students), last year's COVID-related drop exacerbated the trend of declining in-District enrollment, which has decreased by nearly 11 percent (3,300 students) since 2014/15. Out-of-District enrollment has been growing since 2017/18, and the slight rise in total enrollment in the 2019/20 school year was due to entirely to an increase of nearly 500 out-of-District students. The increase in out-of-District students this year (99 students) accounted for nearly 35 percent of the overall increase in 2021/22 total enrollment.

FIGURE 2
SOURCE OF DISTRICT ENROLLMENT



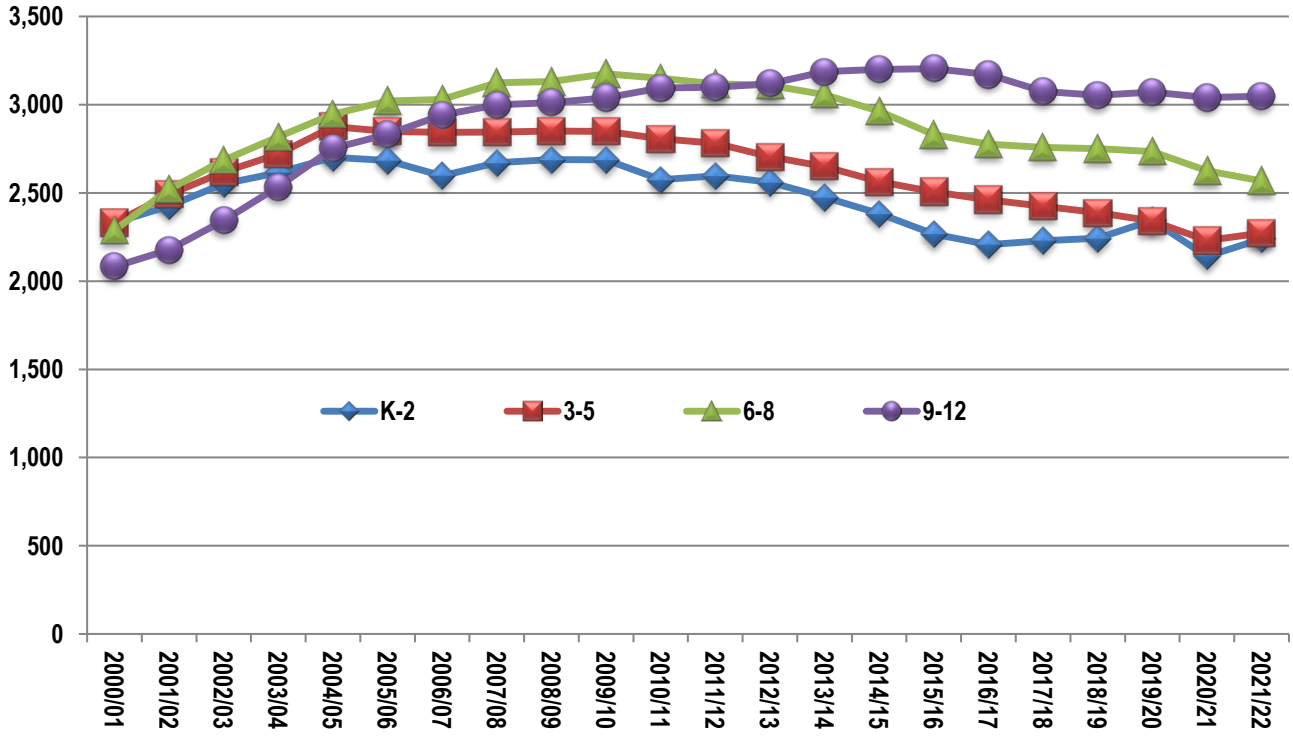
Sources: Gilbert Unified School District; Applied Economics.

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

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

As the influx of young families slowed and the resident population continued to age, District enrollment growth slowed and each grade cohort reacted to the changes in the preceding cohort. By 2010/11, per grade enrollment in all of the primary (K-8) cohorts was in decline. In 2016/17 the effect reached the 9-12 cohort, causing average enrollment in the cohort to decline for several years. In 2019/20, per grade 9-12 enrollment increased slightly (0.6 percent) for the first time since 2015/16, but it has since stabilized at a level that is the lowest of the 10-year period. While grade level enrollment increased this year in both the K-2 and 3-5 cohorts, average enrollment in each cohort remains well-below their 2019/20 (pre-pandemic) level. The largest decline has been in the 6-8 cohort, where average enrollment has declined by six percent since 2019/20.

FIGURE 3
AVERAGE ENROLLMENT BY GRADE BY COHORT



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

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

MAP 2
GEOGRAPHIC DISTRIBUTION OF STUDENTS: 2021/22

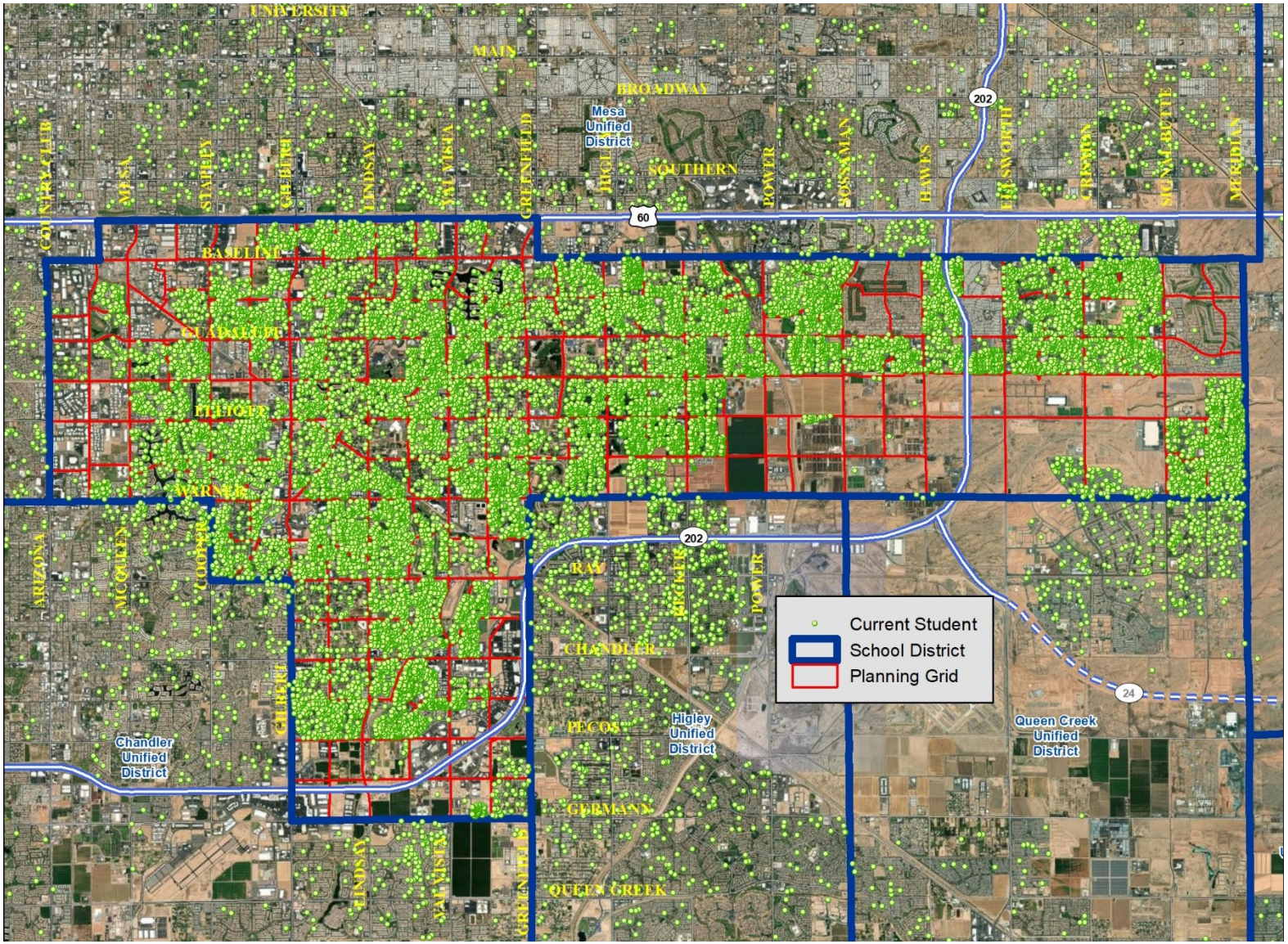


Table 1 shows the source of out-of-District enrollment by grade for the current school year. In all, the 5,640 out-of-District students that were enrolled in 2021/22 came from more than 15 metro area school districts. However, 61 percent of the out-of-District students came from the Mesa Unified School District (more than 2,300 K-12 students) and Higley Unified School District (over 1,100 K-12 students).

Compared to 2020/21, the total number of out-of-District students enrolled in the District increased by 99 students this year. This increase was largely due to an increase in the number of students that were attracted from Mesa Unified School District. Typically, Kindergarten, 7th grade, and 9th grade experience the largest growth of out-of-District enrollment, since these are the grades when students are most likely to transition. This year, however, the pandemic likely continued to cause atypical growth distributions, as the largest out-of-District enrollment increases were seen in the 2nd (44 students), 4th (32 students) and 9th through 11th (72 students) grades. Enrollment declines were most notable in the 1st (-21 students), 3rd (-19 students), 6th (-24 students) and 8th (-13 students) grades.

TABLE 1
SOURCE OF OUT-OF-DISTRICT ENROLLMENT BY GRADE: 2021/22

	Enrollment by Grade														2020/21	
District	KG	1	2	3	4	5	6	7	8	9	10	11	12	Total	Total	Change
Mesa Unified District	193	184	177	180	131	153	135	157	171	198	207	201	223	2,310	2,164	146
Higley Unified District	78	79	74	58	78	74	71	95	85	118	107	123	102	1,142	1,167	-25
Chandler Unified District	51	49	71	50	61	47	39	56	57	79	108	106	114	888	870	18
Queen Creek Unified District	31	27	32	31	42	23	33	28	36	56	64	71	92	566	598	-32
Apache Junction Unified District	23	13	24	15	24	15	18	31	25	43	33	38	36	338	296	42
Florence Unified School District	6	7	7	4	12	6	6	7	7	7	10	7	13	99	114	-15
J. O. Combs Unified School Distric	4	6	9	5	8	9	7	11	11	14	6	8	11	109	125	-16
Kyrene Elementary District	2	4	3	1	2	3	4	0	2	3	1	4	2	31	39	-8
Tempe School District	4	4	7	3	4	5	5	2	4	4	7	1	3	53	25	28
Phoenix Elementary District	0	1	2	0	0	0	1	0	1	3	2	2	1	13	7	6
Roosevelt Elementary District	1	1	2	1	0	0	0	0	0	0	1	0	0	6	7	-1
Maricopa Unified School District	0	0	2	1	0	0	0	1	0	0	0	0	3	7	5	2
Paradise Valley Unified District	0	0	0	1	0	0	0	1	0	1	1	0	0	4	2	2
Scottsdale Unified District	1	0	1	1	1	0	0	1	0	1	3	1	3	13	14	-1
Washington Elementary District	2	0	1	0	1	0	1	0	0	0	0	0	0	5	2	3
Other	4	3	3	2	7	2	3	8	4	3	7	5	5	56	106	-50
Total	400	378	415	353	371	337	323	398	403	530	557	567	608	5,640	5,541	99

Sources: Gilbert Public Schools, 2021; Applied Economics, 2022.
* Current grade compared to prior grade last year except for Kindergarten and 9th grade which are the same grade.

Since 2018/19, the number of out-of-District students coming from the Mesa Unified School District has increased by 30 percent (more than 500 K-12 students), and substantial gains in the number of students enrolling from Chandler Unified (+26 percent) and Apache Junction Unified (+50 percent) have also occurred (**Table 2**).

TABLE 2
CHANGE IN OF OUT-OF-DISTRICT ENROLLMENT BY SOURCE: 2018/198 - 2021/22

District	2018/19	2019/20	2020/21	2021/22	Change 2018/19 - 2021/22
Mesa Unified District	1,772	2,021	2,164	2,310	538
Higley Unified District	1,125	1,142	1,167	1,142	17
Chandler Unified District	702	830	870	888	186
Queen Creek Unified District	586	574	598	566	-20
Apache Junction Unified District	225	291	296	338	113
Florence Unified School District	129	127	114	99	-30
J. O. Combs Unified School District	89	104	125	109	20
Kyrene Elementary District	31	55	39	31	0
Tempe School District	28	27	25	53	25
Phoenix Elementary District	10	13	7	13	3
Roosevelt Elementary District	12	9	7	6	-6
Maricopa Unified School District	7	8	5	7	0
Paradise Valley Unified District	1	6	2	4	3
Scottsdale Unified District	13	6	14	13	0
Washington Elementary District	3	6	2	5	2
Other	36	31	106	56	20
Total	4,769	5,250	5,541	5,640	871

Sources: Gilbert Public Schools, 2021; Applied Economics, 2022.
* Current grade compared to prior grade last year except for Kindergarten and 9th grade which are the same grade.

Table 3 shows where out-of-District students were enrolled in 2020/21 by grade level, and the table clearly illustrates the fact that out-of-District enrollment is concentrated in the District's high schools. Desert Ridge High School continues to have the largest out-of-District enrollment (625 students), followed by Highland High School (405 students). Although enrollment temporarily exploded last year due to the pandemic, Gilbert Global Academy continues to attract a large number of out-of-District K-12 students. Both Houston Elementary and Canyon Valley High School lost all of the out-of-District students that they had enrolled last year.

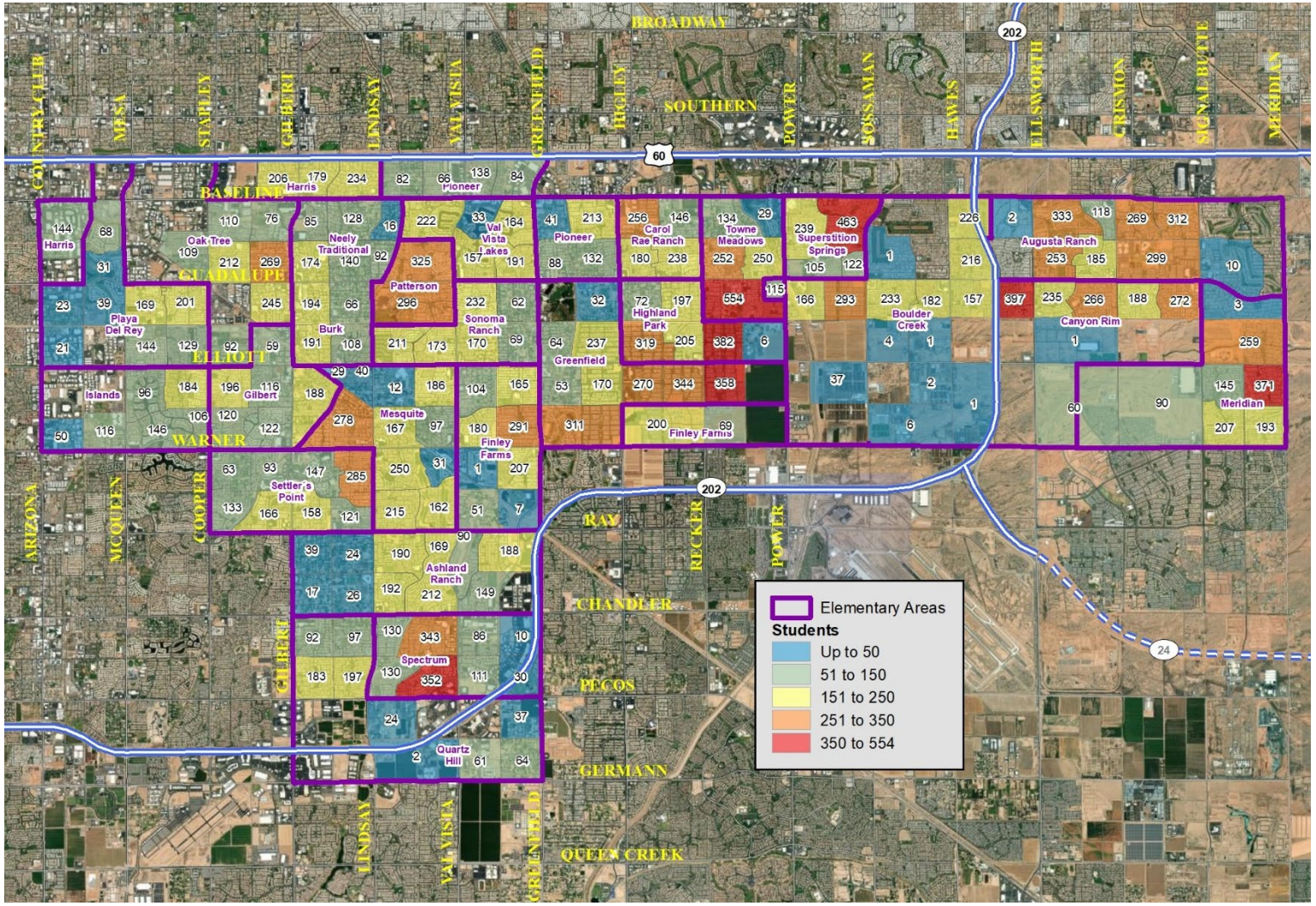
TABLE 3
DESTINATION OF OUT-OF-DISTRICT ENROLLMENT BY GRADE: 2021/22

	KG	1	2	3	4	5	6	7	8	9	10	11	12	Total	2020/21 Total	Change
Ashland Ranch Elementary	7	11	13	15	17	12	7							82	71	11
Augusta Ranch Elementary	22	29	24	21	25	19	22							162	110	52
Boulder Creek Elementary	11	6	6	5	8	4	7							47	43	4
Burk Elementary	11	12	12	12	9	12	13							81	43	38
Campo Verde High School										98	93	108	83	382	338	44
Canyon Rim Elementary	15	17	10	22	10	14	16							104	97	7
Carol Rae Ranch Elementary	9	13	7	9	11	10	6							65	51	14
Desert Ridge High School										149	148	135	193	625	514	111
Desert Ridge Junior High School								107	114					221	170	51
Finley Farms Elementary	8	6	7	8	10	14	9							62	69	-7
Gilbert Elementary	36	23	20	23	14	12	13							141	82	59
Gilbert High School										88	81	99	93	361	275	86
Greenfield Elementary	11	11	19	8	15	14	8							86	69	17
Greenfield Junior High School								60	55					115	100	15
Harris Elementary	15	15	23	17	11	17	15							113	88	25
Highland High School										94	96	115	100	405	385	20
Highland Junior High School								61	59					120	104	16
Highland Park Elementary	19	17	15	12	12	12	14							101	104	-3
Houston Elementary	0	0	0	0	0	0	0							0	44	-44
Islands Elementary	23	21	29	20	26	22	14							155	116	39
Meridian Elementary	15	16	22	11	17	11	12							104	83	21
Mesquite High School										65	88	66	75	294	222	72
Mesquite Junior High School								55	64					119	73	46
Oak Tree Elementary	14	11	12	8	9	9	8							71	49	22
Patterson Elementary	18	15	7	12	10	9	14							85	71	14
Pioneer Elementary	20	16	18	17	12	12	11							106	76	30
Playa del Rey Elementary	12	7	14	11	6	10	14							74	51	23
Quartz Hill Elementary	26	24	28	17	36	25	30							186	166	20
Settler's Point Elementary	5	5	11	4	9	5	8							47	51	-4
Sonoma Ranch Elementary	10	9	10	11	12	9	9							70	40	30
South Valley Junior High School								75	63					138	108	30
Spectrum Elementary	4	15	13	9	10	10	11							72	65	7
Superstition Springs Elementary	19	18	15	12	16	20	9							109	82	27
Towne Meadows Elementary	25	14	23	19	21	15	20							137	111	26
Val Vista Lakes Elementary	6	6	8	15	8	11	8							62	59	3
Neely Traditional Academy	24	28	23	16	19	16	11							137	88	49
Gilbert Classical Academy								20	33	26	35	30	22	166	127	39
Gilbert Global Academy	10	6	14	9	12	4	10	10	12	10	14	14	42	167	1,055	-888
Canyon Valley High School										0	0	0	0	0	31	-31
The Aces- Gilbert				1	1			1						3	1	2
Mesquite Elementary	5	7	12	9	4	9	3	7	3		2			61	54	7
Other	0	0	0	0	1	0	1	2	0	0	0	0	0	4	5	-1
Total	400	378	415	353	371	337	323	398	403	530	557	567	608	5,640	5,541	99

Sources: Gilbert Public Schools, 2021; Applied Economics, 2022.

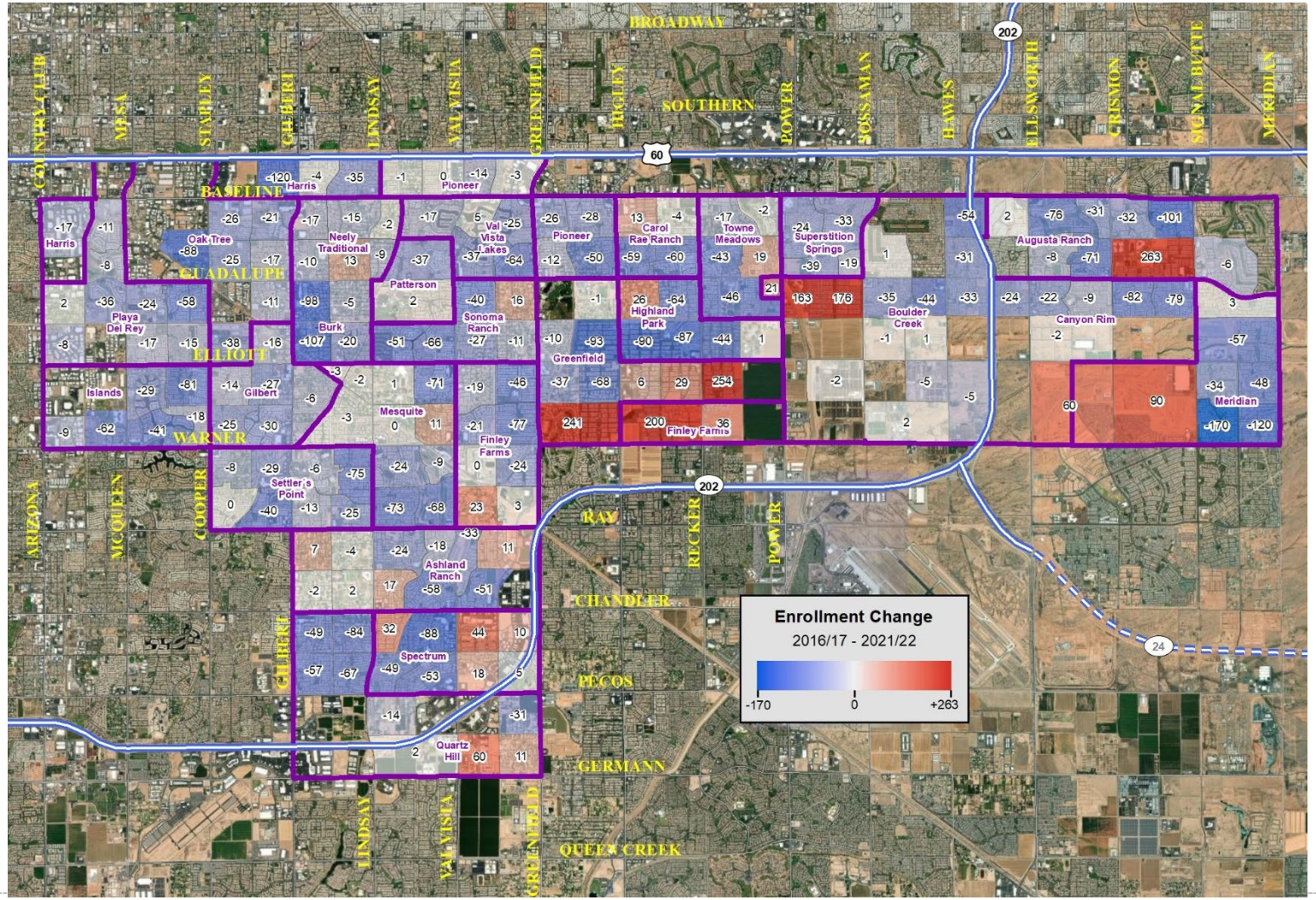
Map 3 normalizes the distribution of the student point data for in-District students, showing the number of K-12 District students coming from each grid. This map shows that enrollment is widely dispersed, with several pockets of higher student concentrations, generally in areas with newer housing developments.

MAP 3
ENROLLMENT DENSITY: 2021/22



Both the point location and grid-level data are useful in examining changes in enrollment over time. **Map 4** shows the change in enrollment by planning grid since 2016/17, during which time aggregate K-12 losses totaled almost 1,600 students. While areas of decline are widespread, pockets of enrollment growth, driven by new home construction, are concentrated in the central portion of the District, generally between Greenfield and Sossaman Roads, although there has also been substantial growth in a few areas east of the Loop 202.

MAP 4
CHANGE IN ENROLLMENT: 2016/17 - 2021/22



2.2 Demographic Trends

Table 4 contains Census data on population and housing in the District for 2000, 2010 and 2020, and some 2020 estimates prepared by Applied Economics; this information can help to explain recent trends and the current character of the area. The compound annual rate of change is provided to allow for comparison between the two periods.

Between 2000 and 2010, the total population in the District increased by nearly 37 percent, from about 135,000 to 184,000 persons. Total population in 2020 was about 211,400, nearly 15 percent higher than the 2010 Census figure; this equates to an annual growth rate of 1.4 percent, down from 3.2 percent per year between 2000 and 2010. Due to slightly stronger growth in the number of households, the population per household has declined somewhat over the last 20 years.

TABLE 4
DEMOGRAPHIC TRENDS

	2000 Census	2010 Census	2020 Census*	Change (2000-2010)** Total	Change (2000-2010)** Percent	Change (2010-2020)** Total	Change (2010-2020)** Percent
Population	135,012	184,433	211,394	49,421	3.2%	26,961	1.4%
Housing Units	47,996	69,306	79,324	21,310	3.7%	10,018	1.4%
Households	44,552	63,380	73,918	18,828	3.6%	10,538	1.5%
Population Per	3.03	2.91	2.86	-0.12	-0.4%	-0.05	-0.2%

Sources: U.S. Bureau of the Census, 2000, 2010 and 2020;American Community Survey, 2020; Applied Economics, 2021.
* Applies to total population, population by race and housing unit counts only.
** Annual compound rate of change.
Housing unit counts in 2010 include adjustments for changes in the Census definition of a housing unit.

Roughly 68 percent of the District population in 2020 is made up of White persons, down from nearly 82 percent in 2000, as shown in **Table 5**. During the same time period, the share of Hispanic persons in the District increased from 12 percent in 2000 to 18 percent in 2020.The population of other racial groups remains comparatively small.

TABLE 5
DEMOGRAPHIC TRENDS – RACE & ETHNICITY

	2000 Census	2010 Census	2020 Census*	Change (2000-2010)** Total	Change (2000-2010)** Percent	Change (2010-2020)** Total	Change (2010-2020)** Percent
Population	135,012	184,433	211,394	49,421	3.2%	26,961	1.4%
By Race & Ethnicity:							
White	81.9%	75.5%	67.6%	28,793	2.3%	3,627	0.3%
African American	2.3%	3.1%	3.1%	2,570	6.2%	905	1.5%
Native American	0.5%	0.8%	0.9%	653	6.5%	444	2.8%
Asian	3.3%	4.9%	5.4%	4,561	7.4%	2,370	2.4%
Hispanic	11.9%	15.7%	18.0%	12,771	6.0%	9,063	2.8%
Other	0.1%	0.1%	5.1%	73	4.4%	10,552	48.4%

Sources: U.S. Bureau of the Census, 2000, 2010 and 2020;American Community Survey, 2020; Applied Economics, 2021.
* Applies to total population, population by race and housing unit counts only.
** Annual compound rate of change.

The data also indicates that the general aging of the District's population, which began in the first 10-year period, has continued since 2010, as shown in **Table 6.** Between 2000 and 2020, as the large number of young families that arrived in the District during the 1990s aged in place, the share of the population under 5 years of age fell from 10.0 percent of the total population to 6.4 percent. Along with the aging of the existing population, this drop is indicative of the sharp decline in birth rates that accompanied the recession. At about 23 percent, the share of the school-age population (5 to 17 years of age) remained relatively unchanged from 2000 to 2010, but it has fallen to roughly 20 percent over the past 10 years. Those in the 25 to 44 age group, which is typically most closely correlated with having young children, constituted about 36 percent of the total population in 2000 but fell to nearly 29 percent in both 2010 and 2020. Meanwhile, the population over 44 years of age has grown significantly faster than all of the other age cohorts over the past 20 years, thereby increasing the share of this age group from about 23 percent in 2000 to 37 percent of the total population in 2020.

TABLE 6
DEMOGRAPHIC TRENDS – AGE

	2000 Census	2010 Census	2020 Census*	Change (2000-2010)** Total	Change (2000-2010)** Percent	Change (2010-2020)** Total	Change (2010-2020)** Percent
Population	135,012	184,433	211,394	49,421	3.2%	26,961	1.4%
By Age:							
Age 0-4	10.0%	7.4%	6.4%	104	0.1%	-71	-0.1%
Age 5-13	16.9%	15.8%	13.5%	6,327	2.5%	-677	-0.2%
Age 14-17	6.3%	7.1%	6.2%	4,678	4.5%	70	0.1%
Age 18-24	7.7%	8.6%	8.4%	5,431	4.3%	1,834	1.1%
Age 25-44	36.4%	29.0%	28.7%	4,482	0.9%	7,156	1.3%
Age 45-64	16.8%	23.5%	25.9%	20,604	6.7%	11,396	2.4%
Age 65 Up	6.1%	8.7%	11.0%	7,795	6.9%	7,253	3.8%

Sources: U.S. Bureau of the Census, 2000, 2010 and 2020;American Community Survey, 2020; Applied Economics, 2021.
* Applies to total population, population by race and housing unit counts only.
** Annual compound rate of change.

Despite a dip in 2010, the housing occupancy rate in 2020 is nearly the same as it was in 2000 (93 percent), as shown in **Table 7**. However, the percentage of owner-occupied housing has fallen from 78 percent in 2000 to about 66 percent in 2020, which is largely due to the consequences of the housing market collapse during the recession. While multifamily housing only accounts for 20 percent of the housing supply currently, the roughly 4,400 units added between 2010 and 2020 account for 44 percent of the total increase in housing supply (10,000 units) during that same period.

TABLE 7
DEMOGRAPHIC TRENDS – HOUSING UNITS

	2000 Census	2010 Census	2020 Census*	Change (2000-2010)** Total	Change (2000-2010)** Percent	Change (2010-2020)** Total	Change (2010-2020)** Percent
Housing Units	47,996	69,306	79,324	21,310	3.7%	10,018	1.4%
Occupied	92.8%	91.4%	93.2%	18,828	3.6%	10,538	1.5%
Owner	78.1%	67.2%	65.8%	9,076	2.2%	5,663	1.2%
Renter	14.7%	24.3%	27.4%	9,752	9.1%	4,875	2.6%
Vacant	7.2%	8.6%	6.8%	2,482	5.6%	-520	-0.9%
By Unit Type:							
Single Family	84.5%	83.5%	80.0%	17,272	3.6%	5,620	0.9%
Multifamily	15.5%	16.5%	20.0%	4,038	4.4%	4,398	3.3%

Sources: U.S. Bureau of the Census, 2000, 2010 and 2020;American Community Survey, 2020; Applied Economics, 2021.
* Applies to total population, population by race and housing unit counts only.
** Annual compound rate of change.

Housing unit counts in 2010 include adjustments for changes in the Census definition of a housing unit.

There is a strong correlation between householder age and the presence of children in a household. Between 2010 and 2020, the share of householders under the age of 45 dropped from 46 percent to 43 percent (**Table 8**); this is another sign of an aging population that can result in fewer young children and an increase in older children. Another emblematic consequence of an aging population is a decline in the population per household. In 2000 there were 3.03 persons per household on average in the District, a reflection of the young families that had moved into the District. By 2020 the population per household fell to 2.86 persons as the District matured and new, entry-level housing became more limited in the District.

TABLE 8
DEMOGRAPHIC TRENDS – HOUSEHOLDS

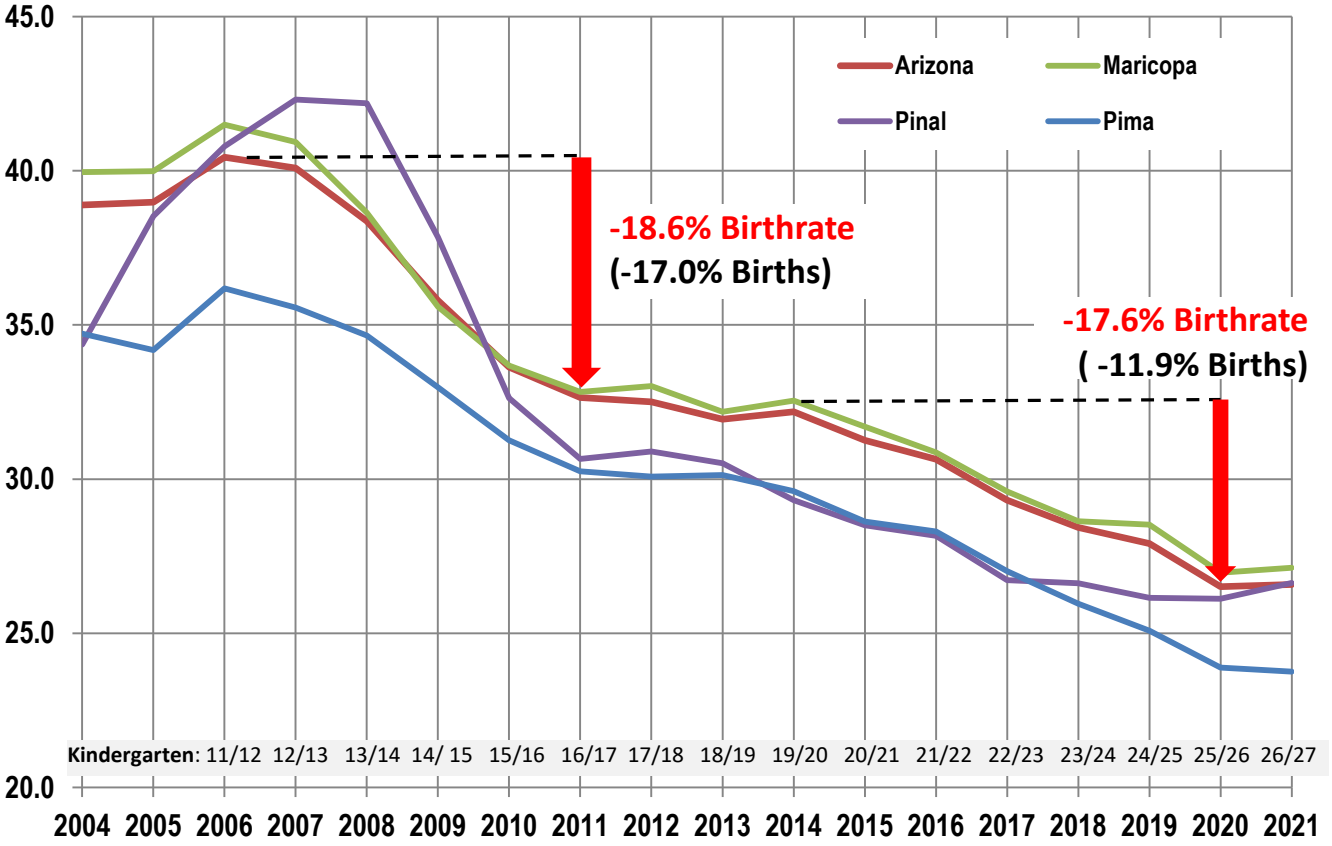
	2000 Census	2010 Census	2020 Census*	Change (2000-2010)** Total	Change (2000-2010)** Percent	Change (2010-2020)** Total	Change (2010-2020)** Percent
Households	44,552	63,380	73,918	18,828	3.6%	10,538	1.5%
By Age of Householder:							
15 to 24	4.3%	3.8%	2.8%	480	2.3%	-301	-1.3%
25 to 34	25.7%	17.7%	16.9%	-224	-0.2%	1,276	1.1%
35 to 44	30.8%	24.8%	23.2%	2,024	1.4%	1,424	0.9%
45 to 54	19.3%	23.8%	22.5%	6,448	5.7%	1,538	1.0%
55 to 64	9.6%	15.0%	16.9%	5,242	8.4%	3,021	2.8%
65 to 74	6.4%	8.7%	10.9%	2,676	6.8%	2,537	3.8%
Over 75	3.9%	6.2%	6.7%	2,182	8.5%	1,044	2.4%
Population Per	3.03	2.91	2.86	-0.12	-0.4%	-0.05	-0.2%

Sources: U.S. Bureau of the Census, 2000, 2010 and 2020;American Community Survey, 2020; Applied Economics, 2021.
* Applies to total population, population by race and housing unit counts only.
** Annual compound rate of change.

Another major factor affecting enrollment in schools is the recent decline in the birth rate, both regionally and nationally. As shown in **Figure 4**, the birthrate (births per 1,000 for the population aged 15 to 45) in Arizona declined by 18.6 percent between 2006 and 2011 due to the recession. Between 2011 and 2014 the rate was fairly stable, but since then through 2020 the rate declined again falling by another 17.6 percent in six years, which brought the total compound rate reduction to 33 percent since 2006. Birthrates stabilized between 2020 and 2021, but more time is needed to determine if it will remain stable, or perhaps even increase.

Despite the continued decline in the birth rate, the total number of births has declined less since 2014 because the population aged 15 to 45 has been increasing. The impact of the declining birth rate on Kindergarten enrollment is delayed five years. As such, the statewide birthrate declines between 2006 and 2011 impacted kindergarten enrollment between 2012/13 and 2016/17. The latest drops in the birthrate will likely have a significant impact on the size of incoming kindergarten classes through at least 2026/27, declining by as much as 11.9 percent statewide.

FIGURE 4
BIRTHRATES IN ARIZONA AND SELECTED COUNTIES



Sources: Arizona Department of Health Services; Applied Economics, 2022.

2.3 Alternative Providers

There are currently 13 charter schools located within the District serving 7,200 K-12 students, and there are an additional 26 charter schools operating within one mile of District boundaries that serve another 12,200 K-12 students. Combined, these schools serve nearly 19,400 students, as listed on **Table 9**. The largest of the charters in the District is Eduprize Schools Gilbert, with enrollment of nearly 1,600 students, followed by Legacy Traditional School-East Mesa, which currently enrolls nearly 1,100 K-8 students in the District.

The largest school located within one mile of the District's boundaries is American Leadership Academy-Gilbert North, which opened in the fall of the 2017-18 school year; this campus, located on Higley Road, is home to two schools that enrolled a total of roughly 2,600 K-12 students at the beginning of the 2021/22 school year. In addition, five other nearby charter schools currently enroll 700 or more students each.

The total number of charter schools located in and nearby the District has generally increased since the 2010/11 school year, accompanied by comparable gains in net enrollment, as shown in **Table 10** the decline in total local charter enrollment in 2020/21 was largely due to the anomalous effects of the pandemic, although in-District charter enrollment suffered stronger losses, which may be due to the fact that they have a larger share of K-8 students than do the area charter schools. Since 2010/11, total local charter enrollment has doubled, increasing by more than 9,700 K-12 students; the majority of that increase (84 percent) has occurred in charter schools located just outside of the District's boundaries. It is clear that charter enrollment growth has compounded the issue of aging-in-place that is occurring throughout the District and has contributed to the waning enrollment at both the elementary and high school level.

Figure 5 shows that the enrollment growth in local charter schools had been heavily concentrated in the elementary grades. Enrollment in grades K-8 comprises the vast majority (80 percent) of the 19,400 total local charter students; this is down from a share of roughly 85 percent that had persisted for several years prior to 2017/18. Over the past five years, local charter schools have increased their 9-12 enrollment by nearly 1,700 students, or 76 percent; as a result, 9-12 enrollment now accounts for 20 percent of total charter enrollment, up from roughly 14 percent in 2016/17.

TABLE 9
ENROLLMENT IN LOCAL CHARTER SCHOOLS

School Name	Address	City	Zip	Grades Offered	Total K-12*
In-District Charter Schools					
Benjamin Franklin Charter School - Gilbert	13641 S. Val Vista Drive	Gilbert	85296	K-6	563
Challenger Basic School	1315 N. Greenfield Road	Gilbert	85234	K-6	345
Desert Hills High School	1515 S. Val Vista Drive	Gilbert	85296	9-12	274
Eduprize Schools Gilbert	580 W. Melody Avenue	Gilbert	85233	K-12	1,585
Gilbert Arts Academy	862 E. Elliot Road	Gilbert	85234	K-8	171
Great Hearts Academies - Archway Arete	4525 E. Baseline Road	Gilbert	85234	K-5	535
Great Hearts Academies - Arete Prep	4525 E. Baseline Road	Gilbert	85234	6-12	546
Liberty Arts Academy	3015 S. Power Road	Mesa	85212	K-8	330
Noah Webster Schools - Mesa	7301 E. Baseline Road	Mesa	85209	K-6	681
San Tan Charter School - Recker Campus	3959 E. Elliot Road	Gilbert	85234	K-6	455
San Tan Charter School - Power Campus	3232 Power Road	Gilbert	85234	7-12	396
Legacy Traditional School - East Mesa	10707 E. Guadalupe Road	Mesa	85209	K-8	1,063
Leman Academy of Excellence-East Mesa	3761 S. Power Road	Mesa	85212	K-8	233
In-District Total					7,177
Area Charter Schools*					
American Leadership Academy - Gilbert K-6	3155 S. Santan Village Parkway	Gilbert	85295	K-6	668
American Leadership Academy - Gilbert North K-6	1010 S. Higley Road	Gilbert	85296	K-6	869
American Leadership Academy - Gilbert North 7-12	1070 S. Higley Road	Gilbert	85296	7-12	1,721
American Leadership Academy - Mesa K-6	4507 S. Mountain Road	Mesa	85212	K-6	439
AZ Compass Prep School	2020 N. Arizona Avenue	Chandler	85225	7-12	234
BASIS Mesa	5010 S. Eastmark Parkway	Mesa	85212	K-12	807
Burke Basic School	131 E. Southern Avenue	Mesa	85210	K-6	722
El Dorado High School	2200 N. Arizona Avenue	Chandler	85224	9-12	166
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	546
Imagine East Mesa Elementary	9701 E. Southern Avenue	Mesa	85208	K-6	622
Imagine East Mesa Middle	9701 E. Southern Avenue	Mesa	85208	7-8	124
Intelli-School Chandler	1727 N. Arizona Avenue	Chandler	85225	9-12	70
Leading Edge Academy Gilbert Early College	717 W. Ray Road	Gilbert	85233	9-12	221
Leading Edge Academy Gilbert Elementary	717 W. Ray Road	Gilbert	85233	K-8	332
Learning Foundation and Performing Arts - Gilbert	4055 E. Warner Road	Gilbert	85296	7-12	402
Learning Foundation and Performing Arts - Warner	3939 E. Warner Road	Gilbert	85296	K-6	346
Legacy Traditional School - North Chandler	1900 N. McQueen Road	Chandler	85225	K-8	898
Montessori Education Centre Charter School - Mesa	2834 E. Southern Avenue	Mesa	85204	K-6	252
Pathfinder Academy at Eastmark	4816 S. Eastmark Parkway	Mesa	85212	K-6	330
Sequoia Charter Elementary School	1460 S. Horne Street	Mesa	85204	K-6	356
Sequoia Secondary School	1460 S. Horne Street	Mesa	85204	7-12	389
Sun Valley High School	1143 Lindsay Road	Mesa	85204	9-12	376
Val Vista Academy	4120 S. Val Vista Drive	Gilbert	85297	K-8	406
Vector Prep & Arts Academy	2020 N. Arizona Avenue	Chandler	85225	K-6	194
Self Development Academy - East Mesa	7930 East Baseline Road	Mesa	85209	K-3	13
Area Total					12,203
Grand Total					19,380

Source: Arizona Department of Education; Applied Economics 2022.

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

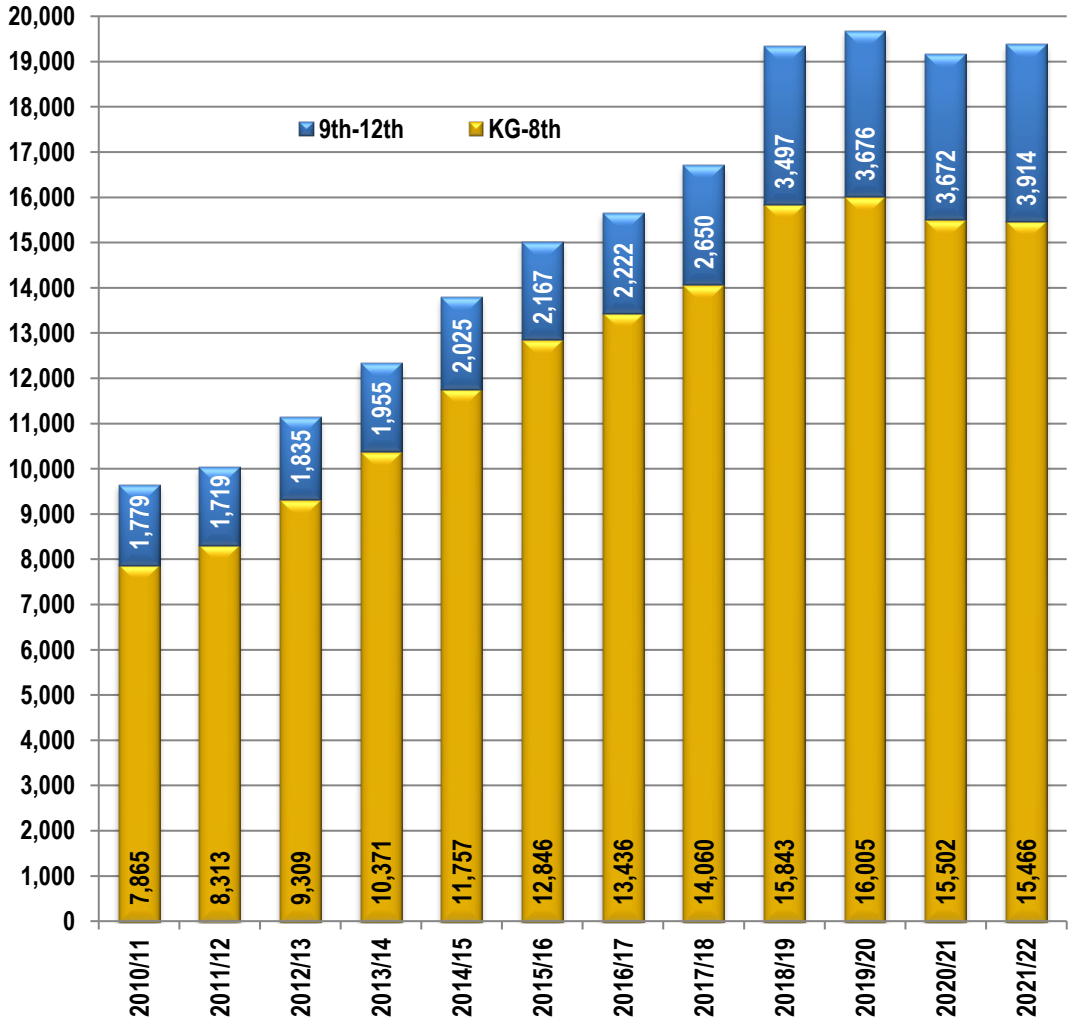
TABLE 10
ENROLLMENT IN LOCAL CHARTER SCHOOLS BY LEVEL

School Year	Number of Schools	KG-8th	Share	9th-12th	Share	KG-12	Annual Change
In District							
2010/11	14	4,868	86.7%	748	13.3%	5,616	
2011/12	14	5,201	87.6%	738	12.4%	5,939	323
2012/13	14	5,432	87.9%	749	12.1%	6,181	242
2013/14	13	5,414	89.8%	618	10.2%	6,032	-149
2014/15	13	5,834	92.5%	470	7.5%	6,304	272
2015/16	13	6,066	91.8%	544	8.2%	6,610	306
2016/17	12	6,009	90.6%	620	9.4%	6,629	19
2017/18	12	5,680	89.6%	658	10.4%	6,338	-291
2018/19	15	6,428	87.7%	903	12.3%	7,331	993
2019/20	15	6,537	87.3%	950	12.7%	7,487	156
2020/21	13	6,156	87.0%	923	13.0%	7,079	-408
2021/22	13	6,169	86.0%	1,008	14.0%	7,177	98
Area Charter Schools*							
2010/11	13	2,997	74.4%	1,031	25.6%	4,028	
2011/12	13	3,112	76.0%	981	24.0%	4,093	65
2012/13	15	3,877	78.1%	1,086	21.9%	4,963	870
2013/14	18	4,957	78.8%	1,337	21.2%	6,294	1,331
2014/15	21	5,923	79.2%	1,555	20.8%	7,478	1,184
2015/16	23	6,780	80.7%	1,623	19.3%	8,403	925
2016/17	24	7,427	82.3%	1,602	17.7%	9,029	626
2017/18	25	8,380	80.8%	1,992	19.2%	10,372	1,343
2018/19	25	9,415	78.4%	2,594	21.6%	12,009	1,637
2019/20	26	9,468	77.6%	2,726	22.4%	12,194	185
2020/21	26	9,346	77.3%	2,749	22.7%	12,095	-99
2021/22	26	9,297	76.2%	2,906	23.8%	12,203	108
Total							
2010/11	27	7,865	81.6%	1,779	18.4%	9,644	
2011/12	27	8,313	82.9%	1,719	17.1%	10,032	388
2012/13	29	9,309	83.5%	1,835	16.5%	11,144	1,112
2013/14	31	10,371	84.1%	1,955	15.9%	12,326	1,182
2014/15	34	11,757	85.3%	2,025	14.7%	13,782	1,456
2015/16	36	12,846	85.6%	2,167	14.4%	15,013	1,231
2016/17	36	13,436	85.8%	2,222	14.2%	15,658	645
2017/18	37	14,060	84.1%	2,650	15.9%	16,710	1,052
2018/19	40	15,843	81.9%	3,497	18.1%	19,340	2,630
2019/20	41	16,005	81.3%	3,676	18.7%	19,681	341
2020/21	39	15,502	80.8%	3,672	19.2%	19,174	-507
2021/22	39	15,466	79.8%	3,914	20.2%	19,380	206

Source: Arizona Department of Education; Applied Economics 2022.

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

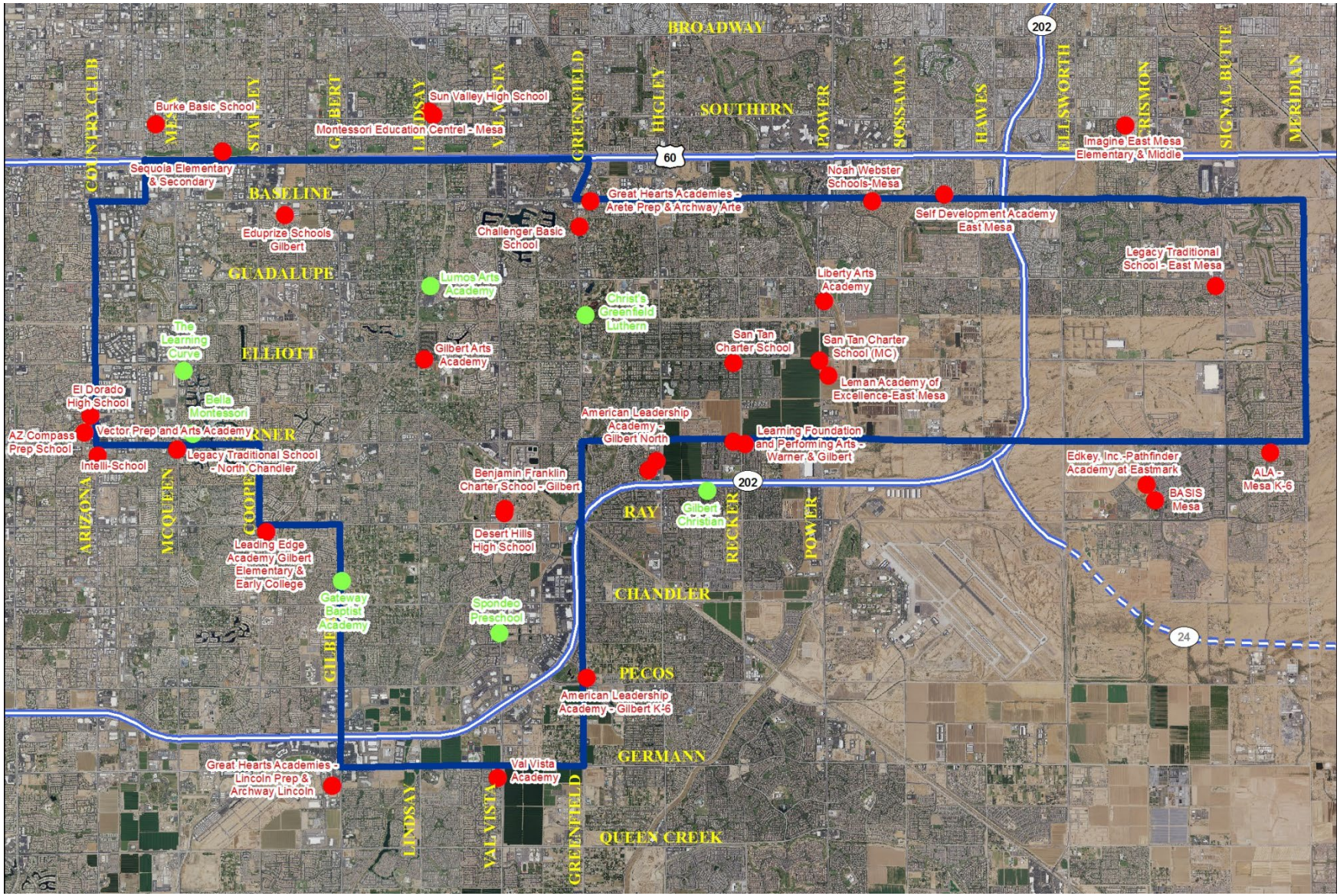
FIGURE 5
DISTRIBUTION OF CHARTER ENROLLMENT BY LEVEL



Source: Arizona Department of Education; Applied Economics, 2022.

The locations of all local, non-District (charter and private) schools are shown on **Map 5**. As previously mentioned, 26 of the 39 local charter schools are located just outside of the District, but within one mile of its boundaries. Many of these charter schools are located in very close proximity to a boundary road; in theory, these schools are more likely to draw students from neighboring districts than those located further inside the District, but this is not a certainty. The data suggests that there is a complex flow of students in the area, both incoming and outgoing, between District, neighboring public districts, charter schools and private schools.

MAP 5
AREA CHARTER AND PRIVATE SCHOOLS



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 updated every 2 years. Currently, there are five private schools operating in the District, which enroll approximately 400 students (**Table 11**). In addition, there is one private school located within one mile of the District's boundary, Gilbert Christian School, which enrolls nearly 1,300 K-12 students.

TABLE 11
ENROLLMENT IN LOCAL PRIVATE SCHOOLS

School Name	Address	City	Zip	Grades Offered	Total K-12
In-District Private Schools					
Bella Montessori	700 S. Islands Drive West	Gilbert	85233	PK-K	6
Christ's Greenfield Lutheran School	425 N. Greenfield Road	Gilbert	85234	PK-8	247
Gateway Baptist Academy	2175 S. Gilbert Road	Gilbert	85295	K-12	42
Spondeo Preschool	2680 S. Val Vista Drive	Gilbert	85295	PK-K	7
Lumos Arts Academy	919 E. Guadalupe Road	Gilbert	85234	K-12	125
In-District Total					427
Area Private Schools*					
Gilbert Christian Schools	3632 E. Jasper Drive	Gilbert	85296	PK-12	1,287
Area Total					1,287
Total					1,714

Sources: NCES Private School Universe Survey (PSS), 2019-20 school year data; Private School Review, 2022; National Council for Private School Accreditation, 2022; Applied Economics 2022.
* Private schools located within approximately one mile of the District's boundaries.

3.0 Residential Development

3.1 Market Conditions

The population in Arizona, shown on **Table 12**, is expected to continue to grow steadily, especially in the metro counties. This will primarily be driven by in-migration and in response to solid economic footing and employment growth. Employment projections released in May 2021 by the Arizona Office of Economic Opportunity show nearly 550,000 jobs to be added in the state between 2019 and 2029. This represents annualized employment growth of 1.6 percent, outpacing the nation which is projected to grow 0.4 percent annually. Both Maricopa and Pinal Counties are forecast to do even better at 1.9 and 1.7 percent growth, respectively.

TABLE 12
POPULATION GROWTH IN THE SUN CORRIDOR

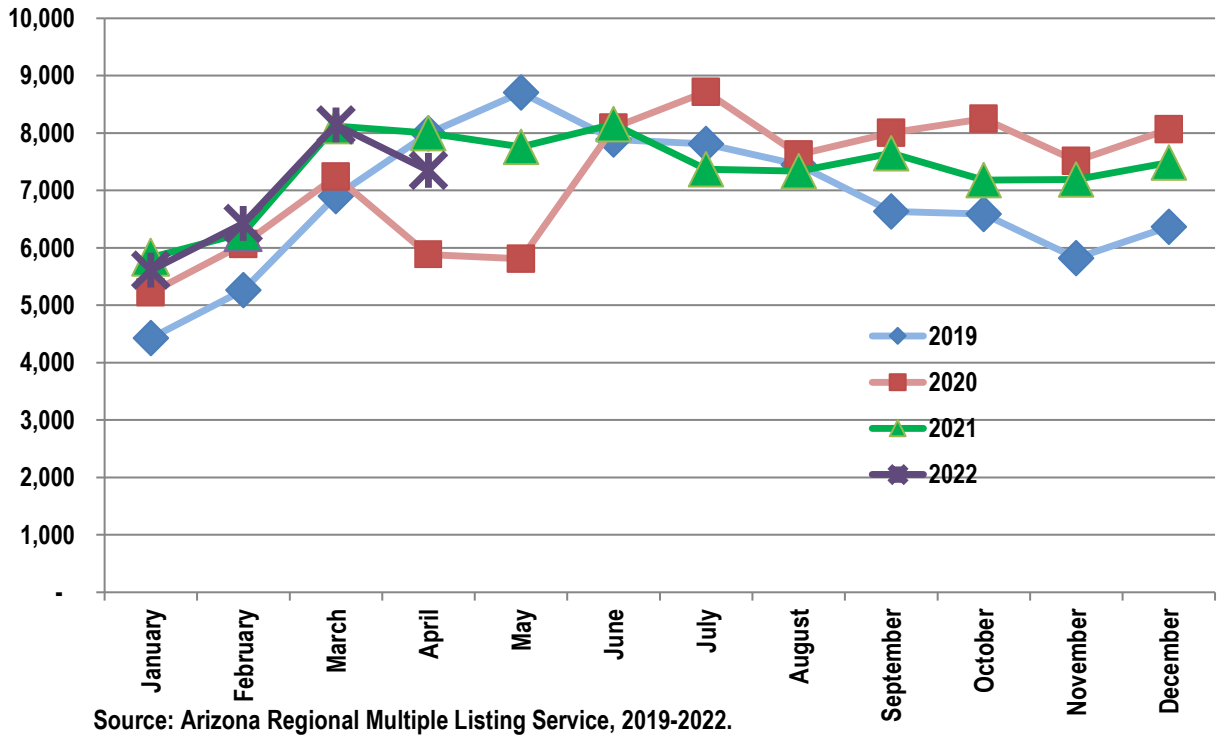
Population	2000	2005	2010	2015	2020	2000-2020
Maricopa County	3,092,927	3,577,074	3,824,058	4,076,438	4,420,568	1,327,641
Pima County	848,375	940,004	981,168	1,009,371	1,043,433	195,058
Pinal County	182,435	250,195	376,369	406,468	425,264	242,829
Yavapai County	169,520	196,629	210,899	217,778	236,209	66,689
Arizona	5,175,581	5,924,476	6,401,568	6,758,251	7,151,502	1,975,921
Change	**1995-2000**	**2000-2005**	**2005-2010**	**2010-2015**	**2015-2020**	**2000-2020**
Maricopa County	24%	16%	7%	7%	8%	43%
Pima County	13%	11%	4%	3%	3%	23%
Pinal County	27%	37%	50%	8%	5%	133%
Yavapai County	27%	16%	7%	3%	8%	39%
Arizona	21%	14%	8%	6%	6%	38%

Source: Arizona Commerce Authority; U.S. Bureau of the Census; Applied Economics, 2021.

Employment growth in the metro region will not be limited to a single sector or geographic area. Education and health services are to grow the fastest, but manufacturing may have the greatest impact. In north Phoenix, Taiwan Semiconductor Manufacturing Co. (TSMC) is working toward a 2024 opening of its' first phase semiconductor fabrication plant in the U.S. with about 2,000 employees. TSMC is also bringing a significant number of Taiwanese suppliers to Arizona, some of which will locate in north Phoenix and others that will locate elsewhere in the metro region. In the Southeast Valley, Intel is expanding its' Chandler campus with two more fabrication plants, adding approximately 3,000 jobs. Electric vehicle company ElectraMeccanica broke ground on a new factory in east Mesa in early 2021 for production to start in 2022. KORE Power is to begin construction on a manufacturing facility for battery cells in Buckeye by the end of 2021 that will eventually employ about 3,000 workers. In Pinal County, Lucid Motors has completed the first phase of its electric automobile manufacturing plant with about 750 employees, and a second phase moving forward, while Nikola Motor is building a factory to produce hydrogen fuel cell trucks with production to begin in 2023

Employment and population growth both result in an expanded residential market. Housing had been buffeted in the past year by the economic slowdown caused by the pandemic, which has led to a mixture of results. An unexpected one is that house sales increased, as shown on **Figure 6**. Aside from the sharp pandemic-related drop in the spring of 2020, the market has been very strong. Even with the pandemic slowdown, total sales in 2020 were the highest in a decade and sales in 2021 continued running at high volumes. The pandemic initially resulted in much lower consumer spending, and also made home ownership a greater priority, especially with new and additional opportunities to work from home. Low mortgage rates made purchases more attainable. By mid-2021 sales had slowed, likely attributable to the shortage of supply in the metro region and rapidly escalating prices. However, sales have generally continued to equal or exceed monthly average volumes since 2011 though total and pending sales fell significantly in April 2022.

FIGURE 6
SALES OF SINGLE FAMILY HOMES

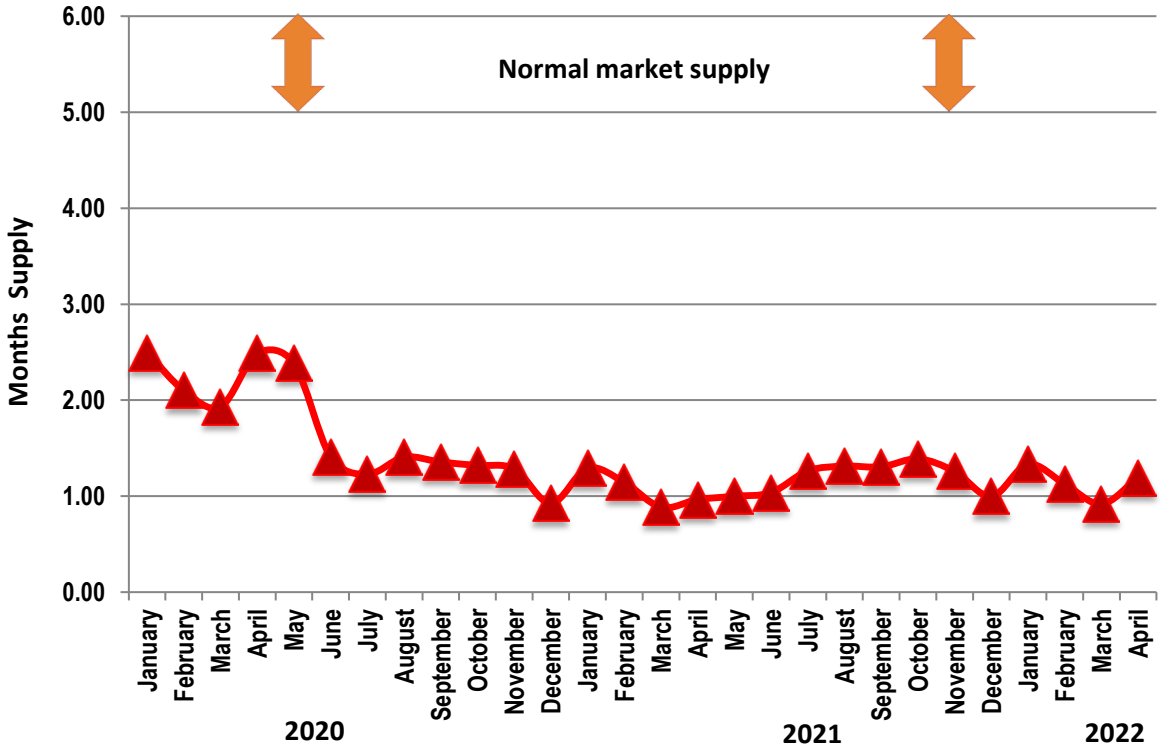


Source: Arizona Regional Multiple Listing Service, 2019-2022.

Metro Phoenix has had two years of the fastest rising home prices in the nation. By May 2021 the price of resale houses actually exceeded new houses in Maricopa County. There has been a recent tendency to blame high prices in Arizona on an influx of California buyers, but that appears largely unwarranted. California buyers only account for about 6 percent of the market and are paying less for homes than buyers from Washington, Colorado, and Illinois, the other major out-of-state buyers. The main underlying issue with rising home prices is supply; which is a continuing issue. While sales are high, new construction is impeded by ongoing labor and materials shortages, exacerbating the imbalance between demand and supply, though some material costs had fallen by late summer. Prices are continuing to increase, but the rate is slowing.

As illustrated by **Figure 7**, in January 2020 the metro Phoenix available housing inventory was only at 2.5 months and it has declined drastically since then, averaging about one month supply during 2021, only slowly moving up. In a normal, balanced market there would be at least a 5-to-6-month supply of houses for purchase.

FIGURE 7
ESTIMATED MONTHS SUPPLY OF SINGLE-FAMILY HOMES



Source: Arizona Regional Multiple Listing Service, 2020 - 2022.

A variety of negative factors could emerge to slow the housing market, especially declining affordability, but the near-term forecast is for continued strength. Mortgage rates are expected to rise but not excessively, though continued price increases will be a problem, especially for first-time buyers. That will drive growth toward the outer suburbs of the metro region, particularly central Pinal County, the West Valley, and later Apache Junction. Members of the Millennial generation, between 25 and 40 years old, make up nearly 40 percent of the residential market now, with stable and well-paying jobs contributing to purchasing capability. Polling shows a preference for newly built houses, and price increases have negated the advantage of resale properties. Millennials are also making up more of the move-up market. These factors also indicate movement toward the outer suburbs, likely in the North and Southeast portions of the metro region. With some households not ready or able to purchase but still wanting to move beyond typical multifamily properties, the single-family rental market should continue to expand. These projects will be found in outer suburbs of the metro region and elsewhere as infill on 10-to-15-acre parcels once planned for commercial uses. Overall, there may be some slowing in the housing market, but fundamental conditions remain strong and continued growth is expected.

3.2 Housing Construction

New housing development in the District is shown on **Table 13** divided into building permit categories intended to reflect correlations between the new housing units and the age structure of the households that occupy them. In general, younger households tend to occupy single family housing built at higher densities, which usually have lower purchase prices. Estate housing, at the lowest density levels, tend to have older householders, with fewer, or older, children. There are, of course, exceptions. Group quarter facilities, such as nursing homes or dormitories, are not included as either retirement or multifamily housing.

Single family housing has been relatively diverse and has become increasingly so, with higher density construction more common in the last few years. Multifamily development has long been a major component of the local market, accounting for about 45 percent of total permitting activity.

TABLE 13
HOUSING PERMITS

Housing Type	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	Total
Family Housing											
Single Family 2 du/ac or less	3	26	11	10	8	14	2	-	-	18	92
Single Family 2.01 - 3.5 du/ac	136	147	175	122	150	162	56	161	250	176	1,535
Single Family 3.51 - 4.5 du/ac	207	41	121	239	196	235	393	161	222	206	2,021
Single Family 4.51 - 6 du/ac	-	-	-	107	308	251	102	181	342	112	1,403
Single Family 6.01du/ac & Over	-	-	2	91	93	117	52	35	64	101	555
Single Family Attached	-	-	-	-	-	6	70	140	151	258	625
Total Single Family	346	214	309	569	755	785	675	678	1,029	871	6,231
Condominium/Townhouse	-	-	26	42	7	31	15	-	8	-	129
Rental SF/BTR	-	-	-	-	-	116	40	-	369	165	690
Standard Courtyard Apts	275	107	524	200	278	687	-	-	-	216	2,287
Urban/Lifestyle Apts	-	-	254	148	238	252	104	297	380	859	2,532
Total Multifamily	275	107	804	390	523	1,086	159	297	757	1,240	5,638
Total Non-Age-Restricted	621	321	1,113	959	1,278	1,871	834	975	1,786	2,111	11,869
Age-Restricted Housing											
Single Family 2.01 - 3.5 du/ac	31	38	55	85	63	98	16	8	-	-	394
Single Family 3.51 - 4.5 du/ac	5	25	7	6	8	-	29	39	3	-	122
Single Family 4.51 - 6 du/ac	-	-	-	-	-	-	-	-	-	-	-
Single Family 6.01du/ac & Over	12	6	31	22	39	-	-	-	-	-	110
Single Family Attached	14	40	30	27	8	-	-	-	22	-	141
Condominium/Townhouse	-	-	-	-	-	20	52	55	2	-	129
Total Age-restricted	62	109	123	140	118	118	97	102	27	-	896
Total	683	430	1,236	1,099	1,396	1,989	931	1,077	1,813	2,111	12,765

Sources: Maricopa Association of Governments; Construction Monitor; Maricopa County Assessor; Applied Economics, 2022.

Non-age-restricted single-family permits over the past three years are shown on **Table 13B**. Available land for development in the District is limited now, so activity appears more volatile through a combination of subdivisions building out without replacement parcels and small infill projects starting and being completed rapidly. As the total amount of development declines, these changes take on outsized impacts. Overall, single family activity is decreasing as the District becomes more built out, though new projects opening will cause permit levels to fluctuate for a few more years.

TABLE 13B
HOUSING PERMITS BY QUARTER

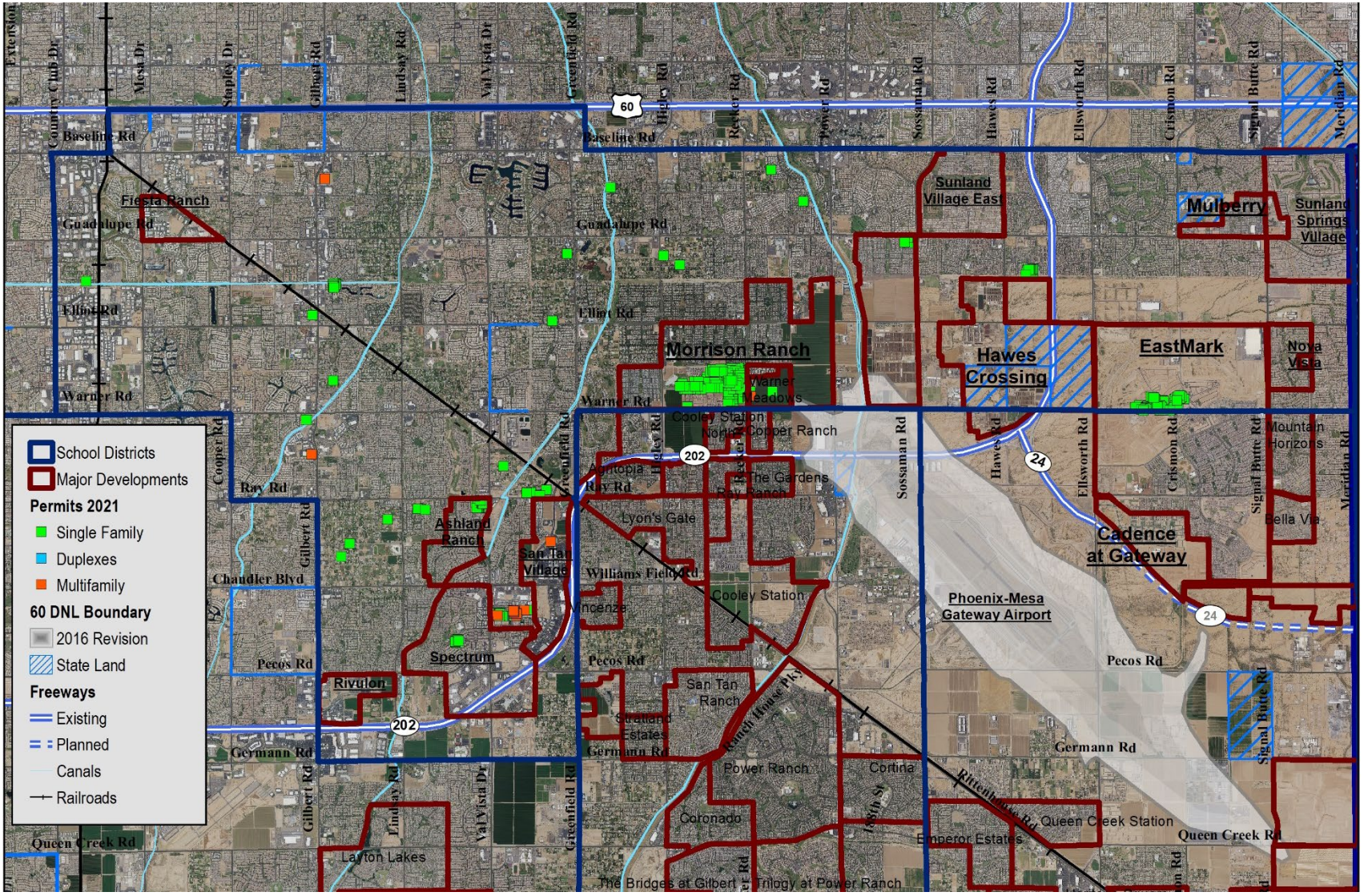
	2019					2020					2021				
Housing Type	Qtr 1	Qtr 2	Qtr 3	Qtr 4	**Total**	Qtr 1	Qtr 2	Qtr 3	Qtr 4	**Total**	Qtr 1	Qtr 2	Qtr 3	Qtr 4	**Total**
Single Family 2 du/ac or less	-	-	-	-	**-**	-	-	-	8	**8**	6	4	-	5	**15**
Single Family 2.01 - 3.5 du/ac	61	75	88	87	**311**	46	29	39	36	**150**	57	44	25	14	**140**
Single Family 3.51 - 4.5 du/ac	51	58	69	67	**245**	47	39	75	45	**206**	62	24	40	44	**170**
Single Family 4.51 - 6 du/ac	39	53	86	66	**244**	92	98	34	78	**302**	-	-	-	-	**-**
Single Family 6.01du/ac & Over	8	23	16	27	**74**	4	17	22	16	**59**	36	27	5	-	**68**
Single Family Attached	24	54	61	5	**144**	74	11	89	44	**218**	47	78	52	58	**235**
Total Single Family	183	263	320	252	**1,018**	263	194	259	227	**943**	208	177	122	121	**628**

Sources: Maricopa Association of Governments; Construction Monitor; Maricopa County Assessor; Applied Economics, 2022.

Map 6 shows development activity in the District in 2020/21 with green markers for individual single family building permits and orange markers for multifamily.

There were high concentrations of activity in 2021 at Morrison Ranch, which is rapidly approaching buildout, and at two subdivisions at Eastmark that are also near completion. Single family infill development can be seen throughout the District, with substantial activity near Ray Road. Multifamily construction can be found on Gilbert Road but the San Tan Village area remains the focus for apartment development.

MAP 6
RESIDENTIAL PERMITTING



3.3 Residential Development

3.3.1 Future Development Potential

Potential housing supply additions in the District is estimated at over 14,000 units, as detailed on **Table 14** by type of housing and according to the general time period during which construction may begin. The timing categories only indicate the starting period of construction and not the rate of production, which can vary widely. The Infill category includes rural parcels, single lots within existing neighborhoods, and small custom projects likely to be under intermittent development over time. Both unit potential and timing estimates on this table will change as new information becomes available.

The next two to five year period will be the primary time for single family development as Warner Meadows, Hawes Crossing, and the remaining subdivisions at Eastmark all enter production. Multifamily development accounts for over 60 percent of the total estimated potential. Much of this is expected to be on redevelopment parcels as vacant residential land continues to be depleted and other land uses change. This is already taking place, as parcels once planned for shopping centers have been rezoned for housing, and existing commercial properties are being reimagined for apartment projects. This evolution of land uses can be expected to continue into the future.

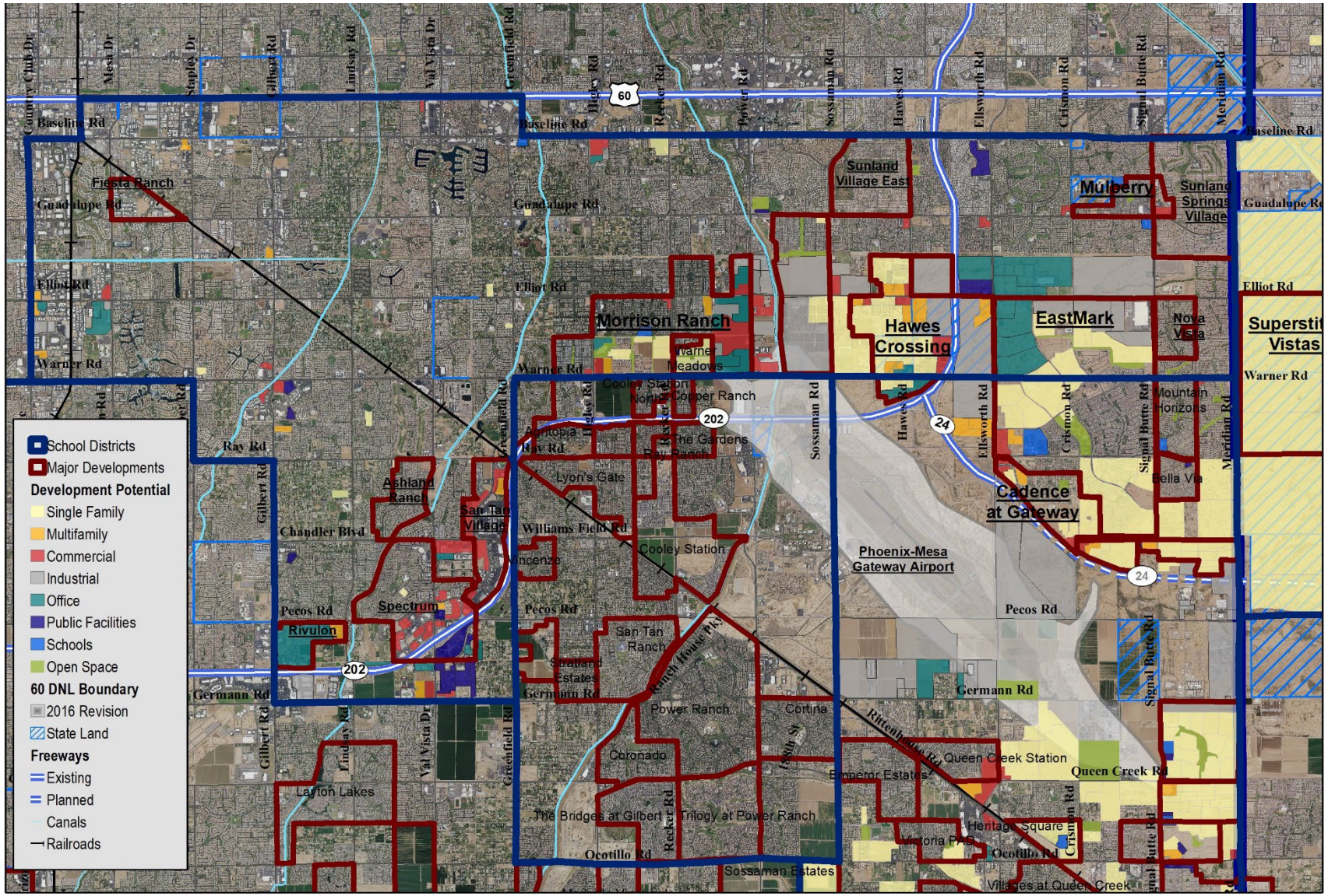
TABLE 14
POTENTIAL NEW HOUSING BY DEVELOPMENT TIMELINE

	Existing		Vacant Land				
Housing Type	Infill	Projects	1 Year	2-3 Years	3-5 Years	5-10 Years	Total
Single Family 2 du/ac or less	2	2	-	31	10	236	281
Single Family 2.01 - 3.5 du/ac	-	36	86	170	520	-	812
Single Family 3.51 - 4.5 du/ac	803	177	18	868	-	-	1,866
Single Family 4.51 - 6 du/ac	-	-	-	595	160	906	1,661
Single Family 6.01du/ac & Over	-	73	-	21	-	280	374
Single Family Attached	-	-	163	103	-	180	446
Total Single Family	805	288	267	1,788	690	1,602	5,440
Condominium/Townhouse	92	-	-	-	-	410	502
Rental SF/BTR	-	-	-	192	307	220	719
Standard Courtyard Apts	-	-	-	-	1,035	1,250	2,285
Urban/Lifestyle Apts	-	-	-	1,724	1,166	2,330	5,220
Total Multifamily	92	-	-	1,916	2,508	4,210	8,726
Total	897	288	267	3,704	3,198	5,812	14,166

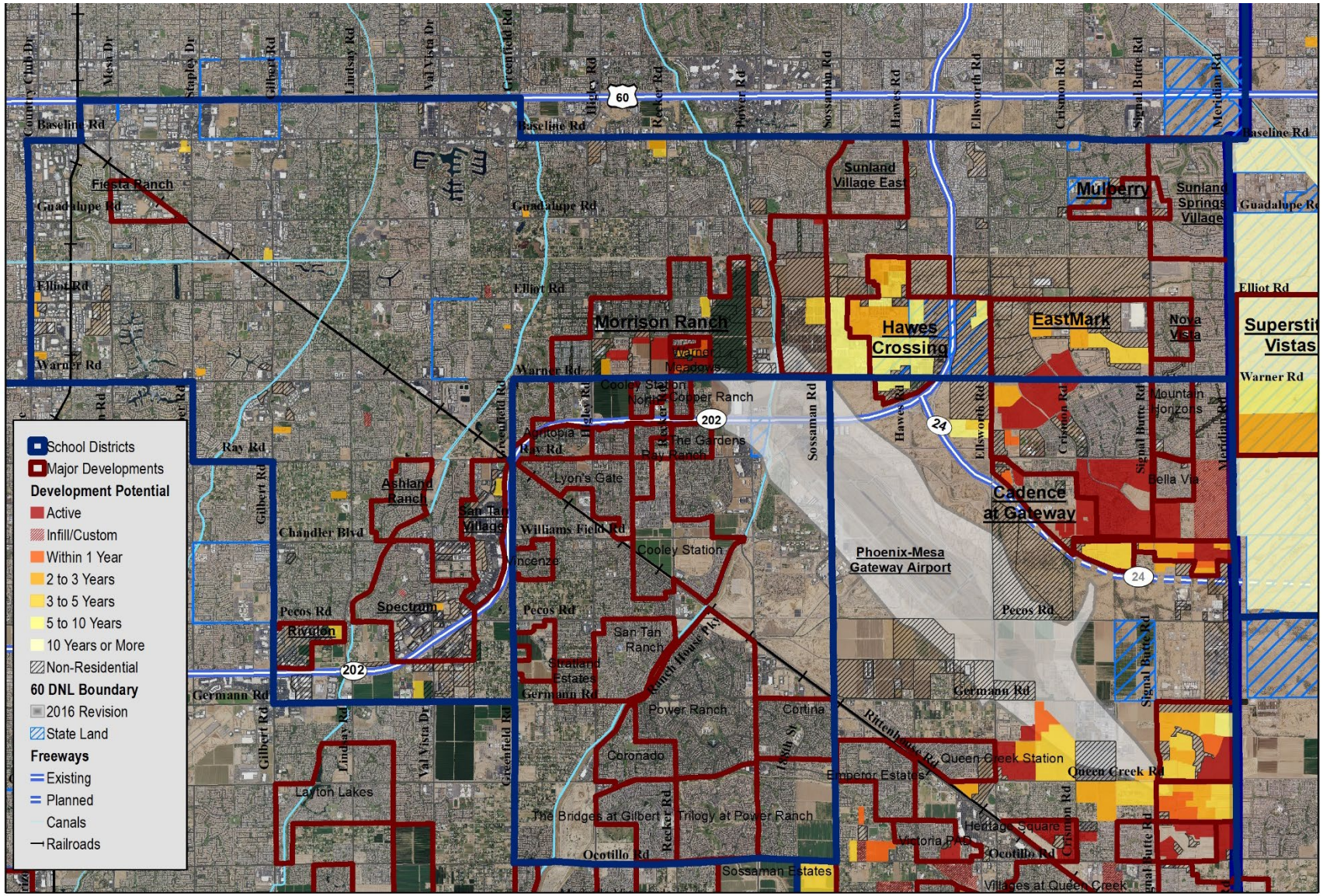
Sources: Town of Gilbert, City of Mesa, City of Chandler; Applied Economics, 2022.

Future land use and development timing is depicted in the following maps (**Maps 7 and 8**), which include part of the surrounding area for perspective. Housing additions in the western half of the District will largely be multifamily and will likely have limited impact on enrollment. New single family growth will be concentrated in the east, especially east of Sossaman Road near Elliot and Warner Roads.

MAP 7
FUTURE LAND USE



MAP 8
DEVELOPMENT TIMING



The presence of a variety of housing options lends stability to the market and provides for differing household types and ages due to a range of housing prices. In general, smaller and less costly housing tends to attract younger householders with younger children. The "move-up" market refers to higher priced houses, typically purchased with the equity derived from the sale of current houses, generally by somewhat older householders. "Executive" housing is at the upper level of pricing with buyers generally older and with children in upper grades, or "empty nesters" without children still in the household. **Table 15** shows pricing at various subdivisions in or near the District. The list is not comprehensive but is meant to illustrate the overall market characteristics in the District.

Regional MLS data shows the March 2022 median sales price for 3-bedroom single family houses as $465,000, based on 3,337 sales. This is up significantly from $430,000 in January but only slightly over $455,000 from last month. While such large price escalations are creating pressures, the local market has remained strong, though slowing. Housing prices in the District tend to be higher than the regional median, but not unusual for this part of the metro area. There is a fairly wide range of offerings, though mostly targeted toward the move-up market rather than first-time buyers.

TABLE 15
HOUSING CHARACTERISTICS AT SELECTED DISTRICT SUBDIVISIONS

Builder	Subdivision	Models offered	Sq. Ft. Min	Beds Min	Price Min	Sq. Ft. Max	Beds Max	Price Max
Capital West	Eastmark: Tower Park *	5	1,700	3	NA	4,160	5	$ 900,000
Landsea Homes	Eastmark: Rev	4	1,810	3	$ 529,990	2,410	4	$ 574,990
Lennar Homes	Warner Meadows: Discovery	5	1,797	4	$ 556,990	3,398	5	$ 692,990
	Warner Meadows: Signiture	7	2,030	4	$ 638,990	2,612	4	$ 717,990
Richmond American	Morrison Ranch: Seasons	4	1,790	4	$ 578,990	2,630	4	$ 663,990
Toll Brothers	Morrison Ranch: Flora	9	2,955	3	$ 1,281,995	4,955	4	$ 2,849,995
Tri Pointe Homes	Annecy: Towns	4	1,194	2	$ 402,500	1,921	3	$ 486,000
William Ryan Homes	Eastmark: Wavelength	4	1,901	3	$ 595,900	2,686	3	$ 705,900
Woodside Homes	Eastmark: Tranquility	8	2,201	3	$ 695,990	4,059	5	$ 949,990

Source: Builder websites; Applied Economics, June 7, 2022.
*General pricing

3.3.2 Development Projects

The District's residential market is entering a slower period due to the exhaustion of single family lots and the lag before new construction parcels will become available. The lack of vacant land for development creates conditions for abrupt shifts in production not typically experienced in areas with multiple large projects at multiple stages of activity.

In the near-term, new residential construction will be winding down as existing projects are completed. In the next 2 to 3 years major construction at new parcels at Eastmark and the opening of the new master plan at Hawes Crossing are forecast to start a new period of strong production levels that should last several years. It is felt that the likely near-term slowing in the housing market due to elevated prices and interest rates should return to more

comfortable levels by the time this production is underway. It is also likely that the local market will be somewhat less affected by these affordability issues than more entry-level market areas.

In the later years of the projection period the lack of land for residential development will again become an issue. Single family development will decline and become limited to infill parcels, single lots, and some redevelopment, mostly in the northern or western portion of the District.

Multifamily development has been strong in the District for a number of years, benefiting from a rejuvenated downtown area, major freeway corridors, and expanding employment opportunities. This residential component is forecast to remain strong, with both apartment and single family rental communities sharing the market. The high-rent, high-amenity type of apartment projects that have been dominant in recent years will likely continue to be prevalent and they will have a very limited impact on District enrollment, but other rental projects may be more attractive to families with children.

Eastmark (north of Warner Road): Woodside Homes, Capital West, William Ryan Homes; Crismon and Warner Roads; 1,640 estimated total lots – 780 remaining.

This 3,200 acre master plan opened in 2013, starting in an area outside the District. There are approximately 7,500 total single family lots with about 20 percent located in the District. Two subdivisions within the District are being built out but house construction otherwise is shifting to subdivisions south of the District. Development activity in the north is currently focused on industrial development (right) and the remaining residential component is being redesigned. New subdivisions in the District are anticipated to become active in late 2023
or 2024 with final buildout in about 2026/27.

Warner Meadows: Lennar Homes; Warner and Recker Roads; 475 estimated total lots – 450 remaining.

New housing construction began in fall 2021 on the first two product lines of this project (right). A larger lot-size and a townhouse product will be added in mid-2022. Production is expected to be strong across all four product lines, with completion of the project attained in 2024.

Hawes Crossing: Lennar Homes, Taylor Morrison Homes; Elliot and Hawes Roads; 2,400 estimated total lots.

The last large master plan in the District, approved in 2020, has entered active development with grading at two sites underway in June 2022 (left). The two parcels of land will total approximately 1,065 conventional single family lots and 103 attached units. Both builders plan to offer multiple product lines and production is expected to be strong with the first occupancies expected in early 2024. Two multifamily parcels are to soon begin development and add about 600 apartment units. Other builders are also expected to acquire development parcels, with construction anticipated by about 2025 if not sooner.

This 1,200-acre development has a major multifamily component, currently estimated at over 2,000 units. This estimate is based on zoning and the actual number of units could be much different depending on the type of project. The single family lot count could also be modified for the same reason.

Superstition Vistas - Reverence: D.R. Horton and Brookfield Residential; Meridian and Warner Roads; 10,000 estimated total lots.

While not within the District, this massive development is located directly on the eastern boundary. There are no Apache Junction schools nearby and it could be a few years before school facilities are constructed at the development. It is possible that the developers will construct a facility to serve the development prior to when fully needed but that is far from certain. Until a school facility is built it is likely that some if not most students at the master plan will seek to attend District schools.

Land development on the first parcels of this master plan commenced summer 2022. The first two subdivisions total 219 lots with house construction expected by late 2023 or early 2024. This would make the first occupancies possible in fall 2024, though probably not many by that time. Other subdivisions will follow and production rates can be expected to be high. The rate of production will have a number of factors affecting it and it is early in the development, but absorption of at least 300-400 lots per year should be expected, and the number could be significantly higher.

Most of the remaining vacant land not otherwise accounted for is located near Power Road. Most of this land is impacted by the Gateway Airport noise restrictions with most future development to be non-residential. There are however some parcels along Sossaman Road that could have residential development. There are no current plans and it is possible that the owners will be resistant to selling for many years, but it is also possible that it could be brought into production during the projection period. It would be unlikely to have a significant impact on the District since development would likely be relatively low density, given the location, and without being part of a master plan the parcels would probably not enter the market in orderly releases, spreading out the new additions.

4.0 District Projections

4.1 Population & Housing

Table 16 provides annual housing, household and population projections for the District through 2031/32 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 12,700 housing units over the next ten years, nearly a 16 percent increase over the nearly 81,000 units that currently make up the District's housing inventory. The majority (62 percent) of new units added during the projection period are expected to be multifamily. By 2031/32 the District's housing inventory is expected to total nearly 94,000 units.

TABLE 16
HISTORIC AND PROJECTED POPULATION AND HOUSING

		Housing Units				Occupancy	Households		
Year	Population	Total*	New	New SF	New MF	Rate	Total	Change	Pop/HH
2010/11	**184,433**	**69,306**	**431**	**431**	**0**	**91.4%**	**63,380**	**246**	**2.910**
2011/12	**184,938**	**69,658**	**352**	**352**	**0**	**91.3%**	**63,621**	**241**	**2.907**
2012/13	**187,814**	**70,341**	**683**	**408**	**275**	**92.1%**	**64,751**	**1,130**	**2.901**
2013/14	**189,623**	**70,771**	**430**	**323**	**107**	**92.5%**	**65,497**	**746**	**2.895**
2014/15	**192,893**	**71,869**	**1,098**	**432**	**666**	**93.1%**	**66,946**	**1,449**	**2.881**
2015/16	**195,480**	**72,968**	**1,099**	**709**	**390**	**93.2%**	**68,022**	**1,076**	**2.874**
2016/17	**199,614**	**74,364**	**1,396**	**873**	**523**	**93.7%**	**69,649**	**1,627**	**2.866**
2017/18	**202,495**	**75,853**	**1,489**	**903**	**586**	**93.6%**	**70,995**	**1,346**	**2.852**
2018/19	**204,833**	**76,784**	**931**	**772**	**159**	**93.6%**	**71,896**	**902**	**2.849**
2019/20	**207,651**	**77,861**	**1,077**	**780**	**297**	**93.8%**	**73,007**	**1,111**	**2.844**
2020/21	**211,394**	**79,324**	**1,463**	**906**	**557**	**93.8%**	**74,443**	**1,436**	**2.840**
2021/22	**215,030**	**81,035**	**1,711**	**1,021**	**840**	**93.9%**	**76,114**	**1,671**	**2.825**
2022/23	217,268	81,989	954	359	595	94.0%	77,070	955	2.819
2023/24	218,495	82,842	853	262	591	93.9%	77,788	719	2.809
2024/25	222,415	84,897	2,055	660	1,395	93.8%	79,633	1,845	2.793
2025/26	226,568	86,966	2,069	860	1,209	93.7%	81,487	1,854	2.780
2026/27	229,360	88,483	1,517	582	935	93.6%	82,820	1,333	2.769
2027/28	231,334	89,548	1,065	615	450	93.5%	83,727	907	2.763
2028/29	233,956	90,881	1,333	533	800	93.5%	84,974	1,246	2.753
2029/30	235,730	91,815	934	446	488	93.5%	85,847	873	2.746
2030/31	237,230	92,715	900	260	640	93.5%	86,689	842	2.737
2031/32	239,004	93,774	1,059	243	816	93.5%	87,679	990	2.726
2022/23 - 2031/32			12,739	4,820	7,919			11,564	

Source: Applied Economics, 2022.
Bolding Indicates Actuals

The increased presence of multifamily housing could attract younger families to the District; however, the majority of the units planned are targeted to young, working professionals, empty-nesters and retirees. Although the population per household is expected to decline by 3.5 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 239,000 people by 2031/32, which represents an increase of 11 percent over the 2021/22 estimate.

4.2 Enrollment

In addition to the volume and market orientation of household growth, trends in per-household student generation and the Enrollment-Population ratios are key factors used in determining future enrollment levels. The first factor, student generation rate, refers to the expected number of school-age persons (aged 5 to 17 years old) per household. As shown in **Table 17**, more than 42,000 school-age persons currently reside in the District, implying an average generation rate of 0.554 school-age persons per household. This rate has fallen by 21 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 17
SCHOOL-AGE POPULATION, TOTAL ENROLLMENT AND E-P RATIO

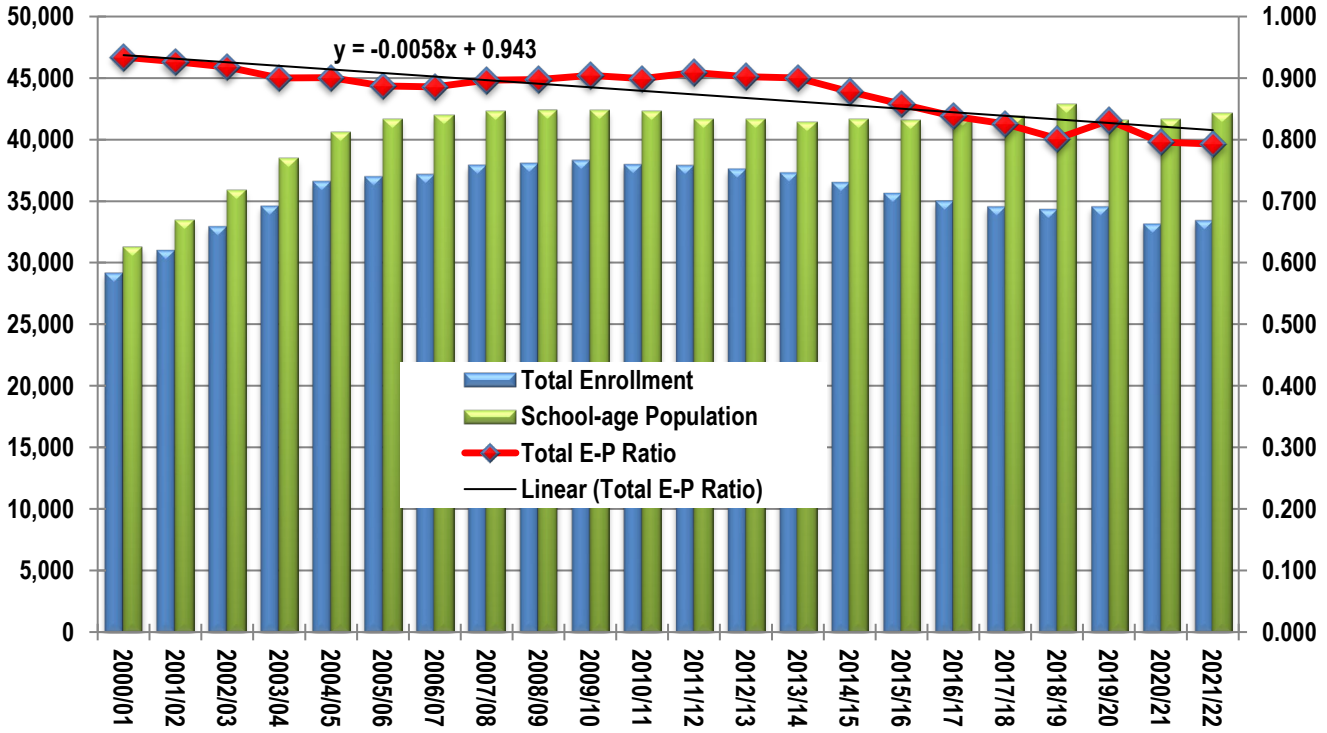
Year	Households	School-Age Population *		K-12 Enrollment	Difference	Enrollment - Population Ratio
		Total	Per HH			
2000/01	44,552	31,245	0.701	29,174	2,071	0.934
2001/02	49,212	33,483	0.701	31,021	2,462	0.926
2002/03	52,263	35,900	0.700	32,941	2,959	0.918
2003/04	55,147	38,435	0.697	34,597	3,838	0.900
2004/05	58,428	40,631	0.695	36,582	4,049	0.900
2005/06	60,801	41,683	0.686	36,986	4,697	0.887
2006/07	61,666	41,969	0.681	37,170	4,799	0.886
2007/08	62,421	42,306	0.678	37,919	4,387	0.896
2008/09	63,024	42,398	0.673	38,061	4,337	0.898
2009/10	63,134	42,357	0.671	38,292	4,065	0.904
2010/11	63,380	42,250	0.667	37,977	4,273	0.899
2011/12	63,621	41,673	0.655	37,884	3,789	0.909
2012/13	64,751	41,676	0.644	37,599	4,077	0.902
2013/14	65,497	41,424	0.632	37,294	4,130	0.900
2014/15	66,946	41,604	0.621	36,529	5,075	0.878
2015/16	68,022	41,538	0.611	35,624	5,914	0.858
2016/17	69,649	41,792	0.600	35,022	6,770	0.838
2017/18	70,995	41,859	0.590	34,542	7,317	0.825
2018/19	71,896	42,866	0.579	34,352	8,514	0.801
2019/20	73,007	41,562	0.569	34,544	7,018	0.831
2020/21	74,443	41,643	0.559	33,149	8,494	0.796
2021/22	76,114	42,157	0.554	33,432	8,725	0.793

Source: Applied Economics, 2022.
* Population age 5 through 17, corresponds with Kindergarten through 12th grade.
Bolding indicates historical data.

The second factor affecting enrollment projections is the ratio between the District's K-12 enrollment and the number of school-age persons living in the District, referred to herein as the Enrollment-Population (E-P) ratio. Due to the growing number of educational alternatives and open enrollment policies, the E-P ratio has become increasingly important when conducting enrollment projections. Assuming a school-age population of 42,157 and total enrollment of 33,432 students results in a difference of 8,700 students and a District E-P ratio of 0.793, or 79.3 percent in 2021/22.

Please note that the E-P ratio is based on the net difference between the school-age population and *total District enrollment*; this difference includes the loss of some 14,400 in-District school-age persons to other providers and the gain of roughly 5,600 students at District schools from outside of the District. As illustrated in **Figure 8**, the difference between the school-age population and total enrollment has been increasing steadily in the District; as a result, the District's E-P ratio has generally declined since 2001/02, although it stabilized at roughly 80 percent between 2017/18 and 2019/20 due to increasing out-of-District enrollment. The ratio this year is consistent with last year's figure but below the ratio achieved in 2019/20 (83.1 percent).

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



Sources: Gilbert Unified School District; Applied Economics.

The *in-District* E-P ratio, referred to as the "service rate," can also be used to assess how successful the District is in enrolling the school-age population that resides within the District; this is done by eliminating students that are enrolled but live outside of the District's boundaries from the total. The service rate is based on the difference between the school-age population and *in-District enrollment*. In 2021/22, in-District enrollment totaled nearly 27,800 students, resulting in a difference of about 14,400 persons and a service rate of 65.9 percent, which is

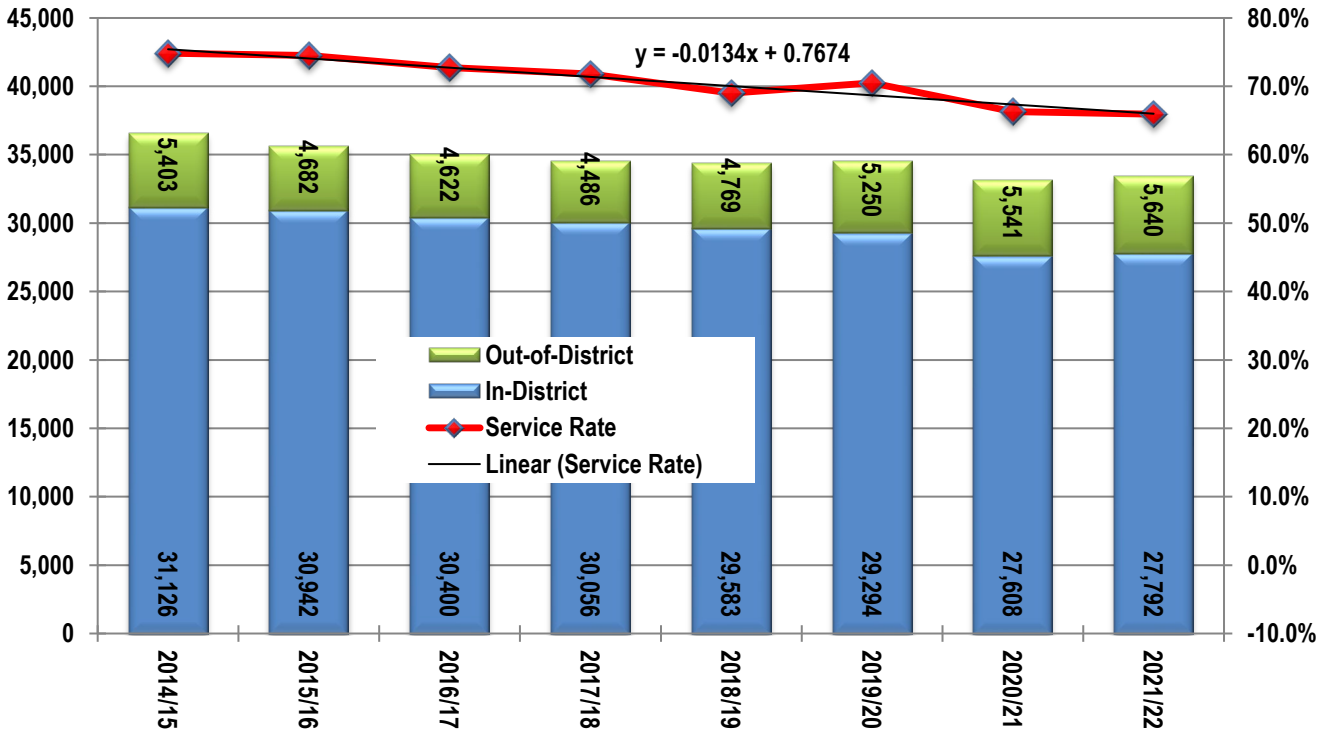
considerably lower than the E-P ratio (79.3 percent) that is based on the District's total enrollment. Since 2014/15, the service rate has decreased by nearly 12 percent, including the sharp decrease last year, as shown in **Table 18**. Since 2014/15, the District's service rate has declined by an average of 1.3% per year, as shown in **Figure 9**.

TABLE 18
SCHOOL-AGE POPULATION, IN-DISTRICT ENROLLMENT AND SERVICE RATE

Year	School-Age Population * Total	School-Age Population * Per HH	K-12 Enrollment	Enrollment - Pop. Ratio	Out of District K-12	Out of District Share	In-district K-12 Enrollment	In-district Difference	Service Rate
2014/15	41,604	0.621	36,529	0.878	5,403	14.8%	31,126	10,478	74.8%
2015/16	41,538	0.611	35,624	0.858	4,682	13.1%	30,942	10,596	74.5%
2016/17	41,792	0.600	35,022	0.838	4,622	13.2%	30,400	11,392	72.7%
2017/18	41,859	0.590	34,542	0.825	4,486	13.0%	30,056	11,803	71.8%
2018/19	42,866	0.579	34,352	0.801	4,769	13.9%	29,583	13,283	69.0%
2019/20	41,562	0.569	34,544	0.831	5,250	15.2%	29,294	12,268	70.5%
2020/21	41,643	0.559	33,149	0.796	5,541	16.7%	27,608	14,035	66.3%
2021/22	42,157	0.554	33,432	0.793	5,640	16.9%	27,792	14,365	65.9%

Source: Applied Economics, 2022.
* Population age 5 through 17, corresponds with Kindergarten through 12th grade.

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



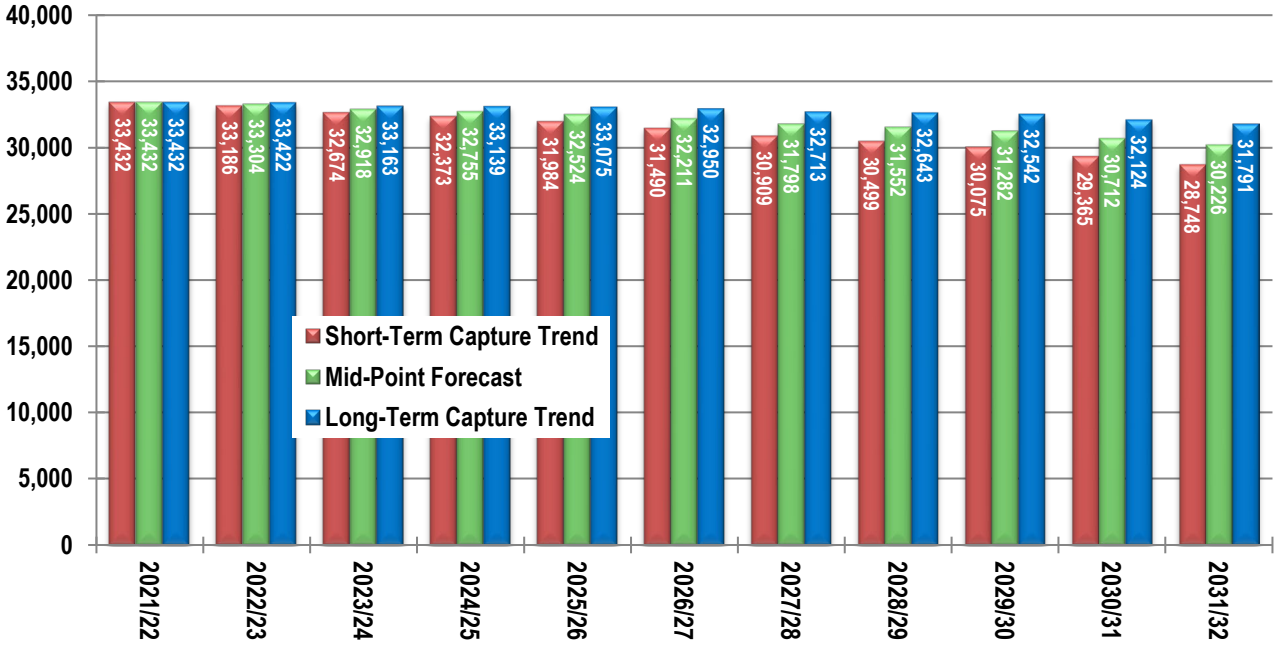
Sources: Gilbert Unified School District; Applied Economics.

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

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

Despite the projected addition of nearly 11,600 households by 2031/32, the school-age population per household is expected to decline during the 10-year period. When the projected school-age population is combined with a falling service rate, each scenario projects a decline in total enrollment by 2031/32, although the rate of decline varies. **Figure 10** compares the K-12 enrollment projections by scenario, illustrating the magnitude of the various assumptions regarding the service rate over time. As the presence of alternative providers has grown, the service rate has increasingly become one of the most important factors affecting projections, and in many school districts it is the most important factor in determining enrollment. For discussion purposes, the analyses presented in the remainder of this report are based on the assumptions presented in the Mid-Point Forecast scenario.

FIGURE 10
DISTRICT ENROLLMENT PROJECTIONS BASED ON ALTERNATIVE SERVICE RATE SCENARIOS



Sources: Applied Economics, 2022.

Table 19 provides a more detailed review of recent past and projected enrollment changes by showing enrollment by grade cohort, in this case employing a Kindergarten to 6th grade (K-6), 7th to 8th grade (7-8) and 9-12 cohort summation. Assuming a moderate service rate decline, the District is expected to experience a loss of about 3,200 students by 2031/32 (9.6 percent), yielding total enrollment of roughly 30,200 K-12 students. Although enrollment increased slightly this year it is expected to decline in each of the next 10 years, dropping by an average of 1.0 percent per year during the projection period.

The vast majority of the 10-year decline (63.5 percent) is expected to due to the loss of roughly 2,000 K-6 students, which represents an enrollment decline of nearly 13 percent compared to 2021/22. Additional enrollment losses in the 7-8 and 9-12 are also projected by 2031/32, although unlike the K-6 cohort some annual upward fluctuations are expected during the 10-year period.

TABLE 19
ENROLLMENT PROJECTIONS BY LEVEL: MID-POINT FORECAST

	Enrollment by Level				K-12 Total		
Fall	K-6	7-8	K-8	9-12	Enrollment	Change	% Change
2010/11	**19,043**	**6,552**	**25,595**	**12,382**	**37,977**	**-315**	**-0.8%**
2011/12	**19,019**	**6,469**	**25,488**	**12,396**	**37,884**	**-93**	**-0.2%**
2012/13	**18,649**	**6,472**	**25,121**	**12,478**	**37,599**	**-285**	**-0.8%**
2013/14	**18,137**	**6,408**	**24,545**	**12,749**	**37,294**	**-305**	**-0.8%**
2014/15	**17,537**	**6,191**	**23,728**	**12,801**	**36,529**	**-765**	**-2.1%**
2015/16	**16,883**	**5,924**	**22,807**	**12,817**	**35,624**	**-905**	**-2.5%**
2016/17	**16,629**	**5,710**	**22,339**	**12,683**	**35,022**	**-602**	**-1.7%**
2017/18	**16,581**	**5,657**	**22,238**	**12,304**	**34,542**	**-480**	**-1.4%**
2018/19	**16,468**	**5,673**	**22,141**	**12,211**	**34,352**	**-190**	**-0.6%**
2019/20	**16,530**	**5,731**	**22,261**	**12,283**	**34,544**	**192**	**0.6%**
2020/21	**15,507**	**5,479**	**20,986**	**12,163**	**33,149**	**-1,395**	**-4.0%**
2021/22	**15,901**	**5,341**	**21,242**	**12,190**	**33,432**	**283**	**0.9%**
2022/23	15,881	5,182	21,063	12,241	33,304	-128	-0.4%
2023/24	15,860	4,924	20,784	12,134	32,918	-386	-1.2%
2024/25	15,803	5,008	20,811	11,944	32,755	-163	-0.5%
2025/26	15,795	5,154	20,949	11,575	32,524	-231	-0.7%
2026/27	15,493	5,238	20,731	11,480	32,211	-313	-1.0%
2027/28	15,289	5,194	20,483	11,315	31,798	-413	-1.3%
2028/29	14,965	5,118	20,083	11,469	31,552	-246	-0.8%
2029/30	14,594	5,171	19,765	11,517	31,282	-270	-0.9%
2030/31	14,217	5,027	19,244	11,468	30,712	-570	-1.8%
2031/32	13,865	4,892	18,757	11,469	30,226	-486	-1.6%

Source: Applied Economics, 2022.
Bolding indicates actuals.

By 2031/32, 7-8 enrollment is projected to total roughly 4,900 students, down 8.4 percent (450 students) compared to 2021/22. Following two years of decline, small 7-8 enrollment gains (2-3 percent annually) are expected from 2024/25 to 2026/27, however these gains are completely offset by the return of annual losses during the second half of the projection period.

In the coming years, the 9-12 grade cohort will be less affected by new housing additions and any increases are expected to be mostly offset by the advancement of smaller in-coming classes; in addition, recent trends suggest that the effect of alternative providers on high school enrollment will likely be more significant than in the past. As a result, 9-12 enrollment is projected to decline in all but one year (2028/29) of the projection period, dropping to 11,500 students by 2031/32; this represents an enrollment decline of 5.9 percent (700 students) compared to 2021/22.

5.0 Sub-District Enrollment Projections

Sub-District enrollment projections are based on the current number of students in each study grid, the expected occupancy of existing housing units and absorption of new housing units, and the expected student generation from existing and newly created households. Expected levels of District-wide absorption are allocated to new residential developments on a project-by-project basis. Absorption is first allocated to active residential projects and then to vacant land planned for residential development, according to the development schedule assigned to each project or project part. Using this data, annual projections of enrollment by grade through 2031/32 for each grid area were developed.

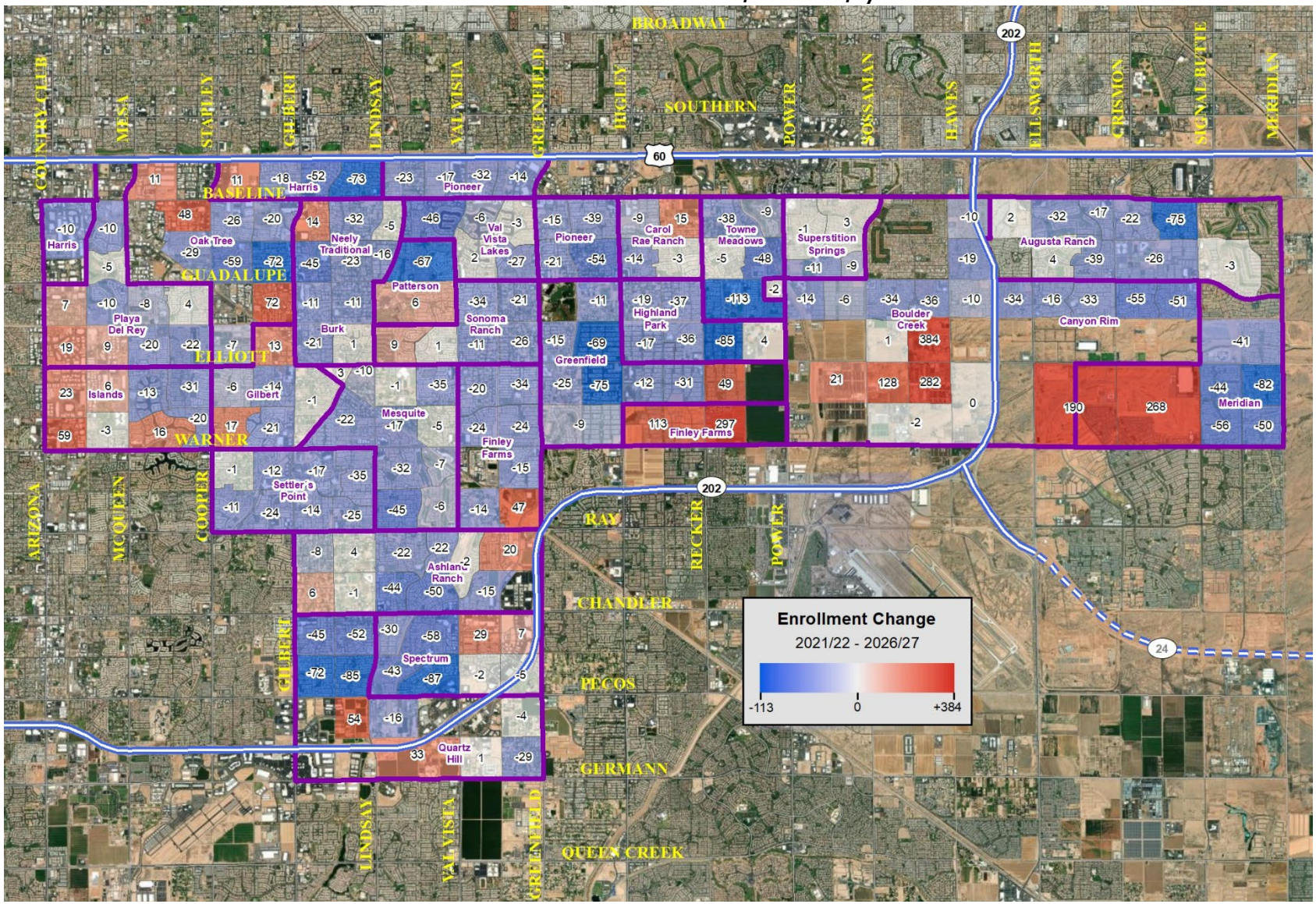
The grid-level projections are then aggregated by attendance area and used to cross-check the District enrollment projections. Matrices showing the relationship between where students live and where they attend school are provided for each elementary, middle and high school attendance area. Finally,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

5.1 Planning Grid Projections

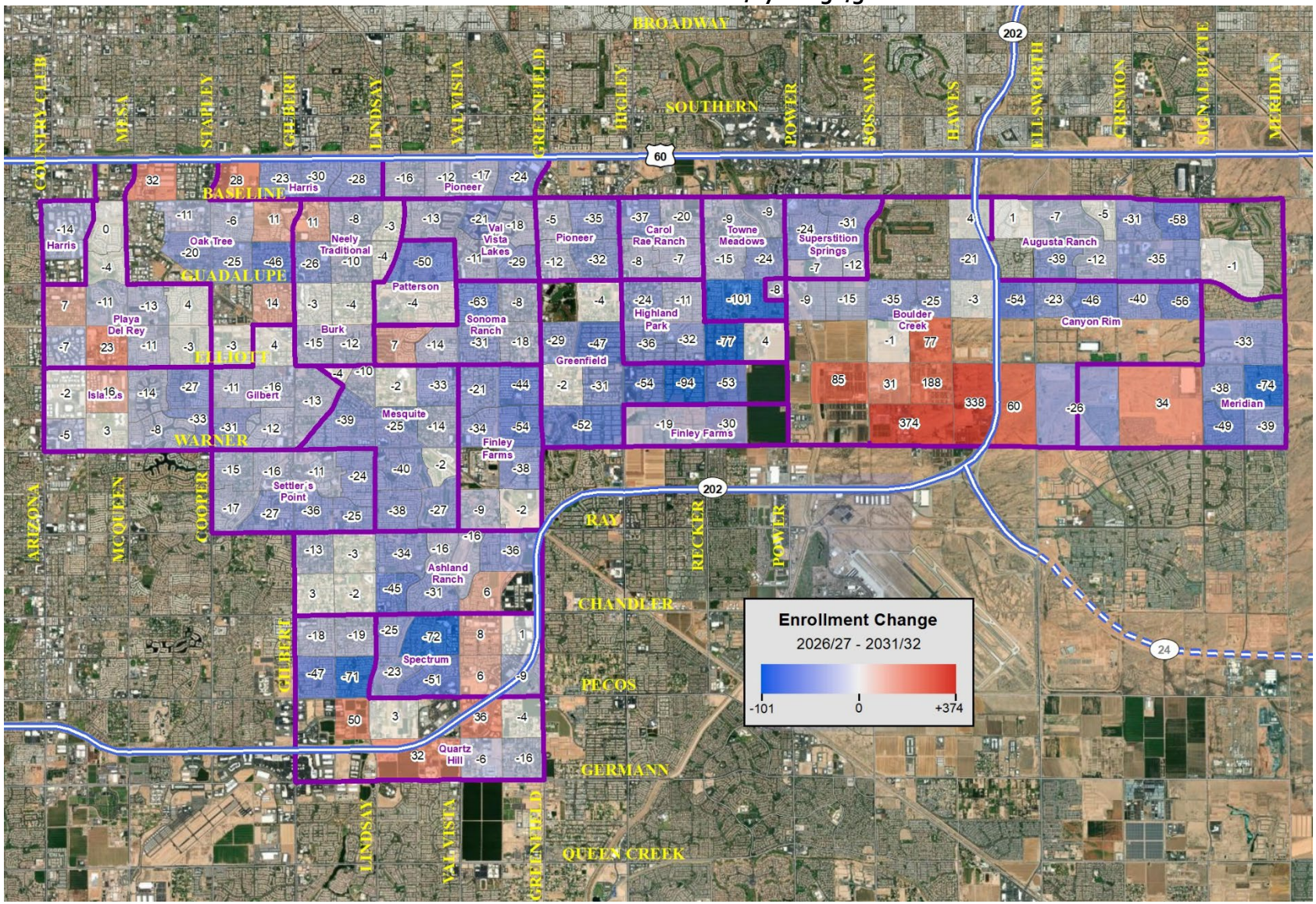
The projected changes in the number of students by grid over the next two five-year periods are depicted on **Maps 9 and 10**. The planning grids are color coded according to the degree of change, with increasing saturations of red for positive change and blue for negative change.

During the first five years of the projection period, concentrations of enrollment growth are concentrated in areas of new development east of Greenfield Road, although there are some pockets of moderate growth scattered throughout the western half of the District. Enrollment losses are widespread throughout the District during this period and can be attributed to a combination of factors, including competition from charter schools and the aging of the existing households. During the second five-year period, enrollment losses are expected to intensify and become even more widespread; the growth areas that remain become even more concentrated in the eastern half of the District, primarily in areas between Warner and Elliott Roads.

MAP 9
ENROLLMENT CHANGE: 2021/22 - 2026/27



MAP 10
ENROLLMENT CHANGE: 2026/27 - 2031/32



5.2 Attendance Area Projections

Table 20 shows historical elementary enrollment by attendance area, as well as projections through 2031/32 based on the Mid-Point Forecast scenario. The enrollment values are color coded relative to the share of total enrollment by year, with higher values in shades of red and lower values in shades of blue. In the annual total columns, the color saturation increases with the degree to which the value is higher or lower than the average for that year. In the change columns, the saturation increases with the value's distance from zero. The change in enrollment for select periods is highlighted in the leftmost columns of the table.

Despite the 400-student increase this year in-District elementary enrollment has generally been declining, the effects of which have been offset somewhat by recent increases in out-of-District enrollment. Subsequent out-of-District enrollment increases, however, are not expected to offset the projected in-District enrollment losses, resulting in an overall decline in elementary enrollment (400 students) by the end of the first five-year period. During the second half of the projection period, moderate losses in both in-District and out-of-District students result in a net loss of another 1,600 K-6 students between 2026/27 and 2031/32. As a result, total elementary enrollment in 2031/32 is expected to total nearly 13,900 K-6 students, versus 15,900 K-6 students in 2021/22.

During the first half of the projection period, 18 of the 25 elementary attendance areas are projected to experience some degree of enrollment decline. These declines completely offset the gains in the remaining attendance areas, resulting in a net loss of 560 in-District K-6 students for the period. The largest enrollment gains are projected in the Boulder Creek (+400 students), Meridian (+200 students) and Finley Farms (+100 students) attendance areas and the largest losses are expected in the Canyon Rim and Greenfield attendance areas (-200 students each). Alternatively, 150 new out-of-District students are expected to be added by 2026/27, although the number of students added declines each year during this period. During the second half of the projection period, enrollment at all but two of the elementary attendance areas is expected to decline, resulting in the loss of an additional 1,800 students over the five-year period; only the Boulder Creek (+400 students) attendance area is expected to experience an enrollment increase of any significance during this period. Out-of-District enrollment is also projected to decrease during the second half of the projection period, declining by about 200 students between 2026/27 and 2031/32.

Ten-year enrollment projections for the junior and high school attendance areas are shown on **Table 21**. District 7-8 attendance area enrollment is expected to decline by about 450 students over the next ten years, the majority of which (77 percent) are expected to occur during the second five-year period. This enrollment decline is driven entirely by a decrease in in-District enrollment (-520 students), which is slightly offset by gain of roughly 70 out-of-District students during the same period. The largest enrollment declines over the 10-year period are expected in the Greenfield and South Valley attendance areas, both of which are expected to lose roughly 200 students by 2031/32. Desert Ridge is the only 7-8 attendance area projected to experience an increase in enrollment over the next 10 years (+150 students).

Significant enrollment declines are projected at the high school level due to the loss of nearly 1,300 in-District 9-12 students over the next 10 years. Only the Desert Ridge attendance area is projected to experience an enrollment increase (+220 students) by 2031/32; losses in the remaining attendance areas range from 200 students (Mesquite) to 500 students (Gilbert). These losses are partially offset by a 570-student increase in out-of-District enrollment, most of which is expected to occur during the second half of the projection period.

TABLE 20
ELEMENTARY ENROLLMENT PROJECTIONS BY ATTENDANCE AREA
MID-POINT PROJECTIONS

	Actual												2016-2021	2021-2026	2026-2031
	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2031/32			
Ashland Ranch	632	674	647	672	645	631	607	589	564	557	526	436	-1	-105	-89
Augusta Ranch	846	865	821	830	817	806	812	817	809	784	760	653	-40	-46	-107
Boulder Creek	712	709	732	724	699	727	746	760	891	1,035	1,149	1,547	15	422	398
Burk	370	319	312	313	278	601	596	607	612	604	589	512	231	-12	-77
Canyon Rim	743	772	705	670	618	689	705	696	603	539	464	323	-54	-225	-141
Carol Rae Ranch	473	449	440	426	383	396	413	412	412	421	401	341	-77	5	-61
Finley Farms	603	603	624	598	585	670	728	787	830	817	787	619	67	117	-168
Gilbert	443	411	410	422	394	401	397	397	400	409	383	326	-42	-18	-58
Greenfield	826	915	948	1,001	917	920	870	850	816	762	723	566	94	-197	-156
Harris	501	497	467	459	386	387	395	380	374	356	345	306	-114	-42	-39
Highland Park	744	701	674	635	526	538	513	503	484	470	454	371	-206	-84	-83
Houston	341	331	328	323	301	0	0	0	0	0	0	0	-341	0	0
Islands	418	416	436	446	382	354	343	357	373	360	358	312	-64	4	-46
Meridian	712	713	655	615	552	563	536	508	566	689	785	734	-149	222	-51
Mesquite	709	726	711	745	702	690	685	671	659	629	600	474	-19	-90	-126
Oak Tree	598	595	595	568	543	554	558	558	555	578	574	511	-44	20	-63
Patterson	352	364	346	342	322	334	330	315	304	298	298	257	-18	-36	-42
Pioneer	463	452	494	493	423	385	357	334	314	298	282	240	-78	-103	-42
Playa Del Rey	428	427	422	411	370	410	403	419	439	442	446	398	-18	36	-48
Quartz Hill	370	368	347	317	281	277	250	233	201	221	202	216	-93	-75	15
Settler´s Point	586	590	640	618	551	579	590	597	578	557	508	372	-7	-71	-136
Sonoma Ranch	434	446	441	434	407	444	431	432	417	403	392	325	10	-52	-67
Spectrum	654	632	595	598	521	532	523	508	496	480	451	373	-122	-81	-77
Superstition Springs	525	510	501	522	487	528	518	523	514	510	506	443	3	-22	-63
Towne Meadows	582	599	555	543	494	526	521	502	484	466	446	390	-56	-80	-56
Val Vista Lakes	412	414	389	395	376	382	377	375	357	347	334	293	-30	-48	-41
Out of District	2,152	2,083	2,233	2,410	2,547	2,577	2,675	2,728	2,750	2,763	2,728	2,525	425	151	-203
Total	16,629	16,581	16,468	16,530	15,507	15,901	15,881	15,860	15,802	15,794	15,492	13,864	-728	-409	-1,628

Source: Applied Economics, 2022.

TABLE 21
SECONDARY ENROLLMENT PROJECTIONS BY ATTENDANCE AREA
MID-POINT PROJECTIONS

	Actual												2016-2021	2021-2026	2026-2031
	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2031/32			
JUNIOR HIGH															
Desert Ridge Junior High	1,089	1,061	1,036	968	907	908	865	816	879	953	969	1,060	-181	61	91
Greenfield Junior High	942	956	941	1,013	936	984	1,047	995	972	992	977	789	42	-7	-187
Highland Junior High	937	926	950	1,006	959	846	817	785	796	789	761	695	-91	-85	-66
Mesquite Junior High	1,252	1,288	1,316	1,263	1,199	1,137	1,071	1,059	1,045	1,053	1,122	1,018	-115	-15	-104
South Valley Junior High	778	751	732	735	677	665	633	569	558	586	557	456	-113	-108	-101
Out of District	712	675	698	746	801	801	748	701	759	782	853	874	89	52	21
Total	5,710	5,657	5,673	5,731	5,479	5,341	5,182	4,924	5,008	5,154	5,238	4,892	-369	-103	-346
HIGH SCHOOL															
Campo Verde High	1,664	1,569	1,531	1,546	1,490	1,488	1,492	1,471	1,432	1,334	1,273	1,071	-176	-215	-202
Desert Ridge High	2,288	2,261	2,244	2,144	2,078	2,042	2,032	1,999	1,994	2,044	2,106	2,263	-246	64	157
Gilbert High	2,494	2,324	2,230	2,175	2,107	2,140	2,112	2,064	2,004	1,897	1,854	1,620	-354	-286	-234
Highland High	2,526	2,573	2,601	2,655	2,677	2,648	2,731	2,740	2,738	2,566	2,527	2,270	122	-121	-257
Mesquite High	1,953	1,849	1,767	1,669	1,619	1,610	1,602	1,535	1,475	1,411	1,373	1,415	-343	-237	42
Out of District	1,758	1,728	1,838	2,094	2,192	2,262	2,273	2,325	2,301	2,324	2,347	2,831	504	85	484
Total	12,683	12,304	12,211	12,283	12,163	12,190	12,241	12,134	11,944	11,575	11,480	11,469	-493	-710	-11

Source: Applied Economics, 2022.

5.3 Attendance Area Versus School Enrollment

The variations between enrollment by attendance area and enrollment by school are detailed in **Tables 22 and 23**. These matrix tables show the movement of students between schools, both within and outside the District. Reading the table across shows the number of students attending a school from each attendance area (listed numerically across the top row as defined in the first column) and from outside the District. Reading down the columns details where students living in each attendance area choose to go to school. The number of students attending the school in their designated attendance area is shaded in green. For example, at the elementary level (**Table 22**) there are 525 students attending Ashland Ranch who reside in the Ashland Ranch attendance area, 1 is from the Canyon Rim attendance area, 9 from the Finley Farms attendance area, 4 from the Gilbert attendance area, and so on.

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

Table 22 details the movement of District elementary students between schools, as well as the distribution of students from outside of the District, which contribute to the differences between enrollment by attendance area and enrollment by school. The matrix shows that of the 13,324 resident students attending District elementary schools this year, 71.8 percent attended the school designated by the attendance area in which they reside; Meridian retained the highest share of resident K-6 students (88 percent) and Gilbert had the lowest share (48 percent). Of the schools with a designated attendance area, Highland Park has the largest net import of students (250 students). The school with the largest export of K-6 students is Boulder Creek with a net loss of 229 students, despite the addition of 47 out-of-District students; this year, 115 elementary students residing in the Boulder Creek attendance area chose to attend Superstition Springs Elementary. Oak Tree Elementary also lost a substantial number of students (135 students) despite the addition of 71 out-of-District K-6 students; in 2021/22, 125 students residing in the Oak Tree attendance area chose to attend Neely Traditional. Of the schools with defined attendance areas, Quartz Hill enrolled the largest number of out-of-District students (186 students).

The movement of District middle and high school students between area of residence and school of attendance is summarized in **Table 23**. At the middle school level, 81.1 percent of resident students attended their designated school. Of the schools with defined attendance areas, South Valley Junior High School had the highest net import of students (216 students), while Highland Junior High School enrolled the largest share of its resident students (89.1 percent). Of Mesquite Junior High's 1,137 resident students, only 64.9 percent choose to attend the school, although a portion of this loss was offset by the enrollment of more than 100 out-of-District students; Mesquite Junior High was also the only school that had a net export of students this year (242 students). Desert Ridge enrolled the largest number of out-of-District students among the junior high schools (221 students).

Of the District's 9,928 resident high school students, 80.6 percent attended the school associated with their attendance area. Highland High School had the largest net enrollment gain (578 students) among the high schools with defined attendance areas, due largely to the addition of 405 out-of-District students. Mesquite had a net enrollment loss of 162 students this year, despite enrolling 294 out-of-District students.

In total, the District enrolled 5,640 K-12 students from outside of the District's boundaries this year, which represents 16.9 percent of the District's total 2021/22 enrollment. Across all of the grade levels, 76.5 percent of resident students chose to attend the school associated with their attendance area of residence in 2021/22, which is less than the 2019/20 (pre-pandemic) ratio of 78.8 percent.

TABLE 22
SCHOOL VERSUS ATTENDANCE AREA ENROLLMENT (K-6th GRADE): 2021/22

		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	Out of District	Total Attendance	Total Reside	Net Difference
Ashland Ranch	1	525				1		9	4	2	1	1	4	2	22	3	2			10	21	2	11		2		82	704	631	73
Augusta Ranch	2		667	30		34							1	13										3	1		162	911	806	105
Boulder Creek	3		14	387		28	1			1				8				1	1		1			6	3		47	498	727	-229
Burk	4	2			316	2	1	2	22		26	4	6		8	19	4	2	4	2	7	2		1	1	5	81	517	601	-84
Canyon Rim	5		59	36		518	2					1		14		2	1	1						2			104	740	689	51
Carol Rae Ranch	6	1	5	22	1	4	329	4		11	2	8		3		3		11			1		2	11	43		65	526	396	130
Finley Farms	7	1	2	3	2	4		449	7	9	2	7		1	12			2	1	1	9	7	10		2	1	62	594	670	-76
Gilbert	8	8		1	35	5	1	16	193	4	16	4	10		23	37	3	5	19		22	7	2		1	2	141	555	401	154
Greenfield	9			9	6		1	70	8	747	1	9	1	3	15		5	7		2	2	13		2	3	3	86	993	920	73
Harris	10	1		1	8				6		239		1		2	7		2	2					1		1	113	384	387	-3
Highland Park	11	5	3	37		4	10	27		67		450		4	2	4	1	16	1	2	1	12	2	9	25	5	101	788	538	250
Islands	12		1	1	5			1	14	2	11		278		4	8	1		18		19	1	5			2	155	526	354	172
Meridian	13		10	8		46	2	1						497										2	1		104	671	563	108
Mesquite	14	2	1		5		1	2	9	9		2		3	447	6		2	2	5	2	8	9		2	4	49	570	690	-120
Oak Tree	15	1		3	6			3	17		14		2		2	274	5	3	6		4	4		1		3	71	419	554	-135
Patterson	16	5	1	9	62	4	1	4	16	2	9	2	1	2	13	23	251	8	5	1	6	28	6	4	5	10	85	563	334	229
Pioneer	17	5	3	2	3	3	3	4	1	2	3	1		3	9		3	255		1	3	3	4	3		2	106	422	385	37
Playa Del Rey	18	4			8	1			7		14		13		1	13	2		291		8	1	2				74	439	410	29
Quartz Hill	19	12	1	3			1	5	1	1		2	1	1	8		1		1	214	7	1	42	1	4		186	493	277	216
Settler's Point	20	11	2		10	1	1	6	17		2	1	4		34	7	4	2	3	2	409	1	3			3	47	570	579	-9
Sonoma Ranch	21	6		3	6			6	1	7	4		3	1	15	2	17	7			3	308	7	3	6	6	70	481	444	37
Spectrum	22	10	2	1	2			2	1		1				14	5			1	6	9	2	389			3	72	520	532	-12
Superstition Springs	23		7	115	3	5	3		2	1	1	5		1	1		1					3		442	30	1	109	730	528	202
Towne Meadows	24	7	13	26	4	8	19	8	1	19	4	15		1		3	2	8	2	7	1	5	1	18	382	4	137	695	526	169
Val Vista Lakes	25		3	3	16	2	1	5	6	6	9	2			5	6	22	20			3	12	4	1	3	313	62	504	382	122
Neely Traditional		13		14	91	4	10	32	56	22	18	15	18		44	125	8	17	48	16	26	13	12	6	7	12	137	764	0	764
Gilbert Global Academy		12	11	9	12	14	8	13	11	8	10	9	10	5	8	7	1	15	2	8	14	10	20	11	5	2	65	300	0	300
Other		0	1	4	0	1	1	1	1	0	0	0	1	1	1	0	0	1	3	0	1	1	1	1	0	0	4	24		
Total Reside		631	806	727	601	689	396	670	401	920	387	538	354	563	690	554	334	385	410	277	579	444	532	528	526	382	2,577	15,901	13,324	2,577
Reside/Atttend Same		83%	83%	53%	53%	75%	83%	67%	48%	81%	62%	84%	79%	88%	65%	49%	75%	66%	71%	77%	71%	69%	73%	84%	73%	82%			9,570	71.8%

Sources: Gilbert Public Schools; Applied Economics, 2022.

TABLE 23
SCHOOL VERSUS ATTENDANCE AREA ENROLLMENT (7th-12th GRADE): 2021/22

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	793	9	11	1	4	221	1,039	908	131
Greenfield Junior High School	2	12	806	47	140	24	115	1,144	984	160
Highland Junior High School	3	69	69	754	20	8	120	1,040	846	194
Mesquite Junior High School	4	2	22	2	738	12	119	895	1,137	-242
South Valley Junior High School	5	2	22	2	128	589	138	881	665	216
Gilbert Classical Academy		14	43	24	90	19	53	243	0	243
Gilbert Global Academy		12	10	6	12	3	22	65	0	65
Other		4	3	0	8	6	13	34	0	34
Total Reside		908	984	846	1,137	665	801	5,341	4,540	801
Reside/Atttend Same (In-District)		87.3%	81.9%	89.1%	64.9%	88.6%		3,680	81.1%	

HIGH SCHOOL

School		Attendance Area 1	2	3	4	5	Out of District	Total Attendance	Total Reside	Net Difference
Campo Verde High School	1	1,288	8	56	22	222	382	1,978	1,488	490
Desert Ridge High School	2	2	1,776	7	40	1	625	2,451	2,042	409
Gilbert High School	3	83	24	1,561	125	188	361	2,342	2,140	202
Highland High School	4	16	151	304	2,323	27	405	3,226	2,648	578
Mesquite High School	5	21	6	65	11	1,051	294	1,448	1,610	-162
Gilbert Classical Academy		40	19	88	76	80	113	416	0	416
Gilbert Global Academy		28	47	49	42	37	80	283	0	283
Other		10	11	10	9	4	2	46	0	46
Total Reside		1,488	2,042	2,140	2,648	1,610	2,262	12,190	9,928	2,262
Reside/Atttend Same (In-District)		86.6%	87.0%	72.9%	87.7%	65.3%		7,999	80.6%	

In-District Students (K-12)	Reside/Atttend Same (In-District)	21,249	76.5%	

Sources: Gilbert Public Schools, 2021; Applied Economics, 2022.

5.3 Enrollment by School

The observed trends in school enrollment versus attendance area enrollment for the past five years are used to create projections of enrollment by school. While intra-District movement patterns tend to hold steady for several years, the potential for new alternative providers, special programs, and a host of other factors can cause these relationships to shift over time. Therefore, the projections by school for the long-term, 5 to 10 years into the future should be used with caution. The projections of enrollment by school provided in **Tables 24 and 25** reflect the same pattern of change as the attendance areas, therefore no further description of these results is provided.

TABLE 24
ELEMENTARY ENROLLMENT BY SCHOOL

	Actual												2016-2021	2021-2026	2026-2031
	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2031/32			
ELEMENTARY															
Ashland Ranch	732	787	787	768	561	704	695	678	653	642	609	488	-28	-95	-121
Augusta Ranch	942	980	948	947	750	911	922	938	916	902	866	760	-31	-45	-106
Boulder Creek	635	574	556	532	401	498	489	498	624	762	876	1,283	-137	378	406
Burk	394	344	355	349	238	517	513	521	528	512	497	429	123	-20	-68
Canyon Rim	777	781	779	746	585	740	778	774	701	637	580	423	-37	-160	-158
Carol Rae Ranch	581	527	531	506	408	526	553	556	556	567	560	475	-55	34	-85
Finley Farms	682	649	662	642	489	594	650	710	759	744	718	547	-88	124	-172
Gilbert	511	496	480	514	396	555	583	610	646	670	659	574	44	104	-85
Greenfield	804	918	959	1,028	831	993	952	941	907	870	826	648	189	-167	-178
Harris	440	444	428	444	313	384	374	356	351	333	317	285	-56	-67	-32
Highland Park	885	865	856	840	702	788	777	769	754	733	704	575	-97	-84	-129
Houston	386	348	336	332	238	0	0	0	0	0	0	0	-386	0	0
Islands	498	509	538	571	437	526	522	538	543	528	517	458	28	-9	-59
Meridian	829	799	730	683	575	671	657	641	697	818	894	794	-158	223	-99
Mesquite	561	578	578	590	463	570	566	550	541	511	470	370	9	-100	-100
Neely Traditional	762	783	802	780	546	764	750	739	726	721	712	713	2	-52	1
Oak Tree	541	535	499	470	344	419	408	392	371	385	382	343	-122	-37	-39
Patterson	550	561	565	591	455	563	566	568	567	569	572	509	13	9	-63
Pioneer	527	508	534	541	370	422	391	371	359	334	312	264	-105	-110	-49
Playa Del Rey	460	433	421	440	339	439	423	433	460	469	464	421	-21	25	-43
Quartz Hill	620	645	639	575	436	493	477	465	444	478	462	458	-127	-31	-3
Settler´s Point	586	579	625	609	468	570	586	607	581	570	530	401	-16	-40	-130
Sonoma Ranch	427	438	440	458	377	481	475	472	443	416	405	342	54	-76	-63
Spectrum	623	578	580	618	408	520	518	500	480	458	419	341	-103	-101	-78
Superstition Springs	670	696	700	740	595	730	741	748	752	745	737	639	60	7	-98
Towne Meadows	677	688	622	668	587	695	675	664	631	617	598	550	18	-97	-48
Val Vista Lakes	520	515	497	518	429	504	506	500	476	460	455	415	-16	-49	-40
Other	9	23	21	30	2,766	324	334	322	339	343	352	362	315	28	10
Total	16,629	16,581	16,468	16,530	15,507	15,901	15,881	15,860	15,803	15,794	15,492	13,864	-728	-409	-1,628

Source: Applied Economics, 2022.

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

TABLE 25
SECONDARY ENROLLMENT BY SCHOOL

	Actual												2016-2021	2021-2026	2026-2031
	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2031/32			
JUNIOR HIGH*															
Desert Ridge Junior High	1,296	1,242	1,182	1,100	860	1,039	1,014	936	968	1,029	1,066	1,077	-257	27	11
Gilbert Junior High	444	0	0	0	0	0	0	0	0	0	0	0	-444	0	0
Greenfield Junior High	855	911	900	1,056	920	1,144	1,161	1,085	1,074	1,058	1,039	853	289	-105	-185
Highland Junior High	1,208	1,221	1,269	1,279	1,004	1,040	978	943	971	1,005	1,030	982	-168	-10	-48
Mesquite Junior High	607	995	969	924	691	895	827	813	844	882	920	873	288	25	-47
South Valley Junior High	1,075	1,022	1,047	1,026	754	881	865	809	812	842	846	769	-194	-35	-76
Gilbert Classical Academy	217	241	271	295	191	243	240	240	240	240	240	240	26	-3	0
Other	8	25	35	51	1,059	99	98	98	98	98	98	98	91	-1	0
Total	5,710	5,657	5,673	5,731	5,479	5,341	5,182	4,924	5,008	5,154	5,238	4,892	-369	-103	-346
HIGH SCHOOL*															
Campo Verde High	2,109	2,042	2,059	2,119	1,770	1,978	2,010	1,995	1,962	1,880	1,834	1,766	-131	-144	-68
Desert Ridge High	2,824	2,839	2,832	2,617	2,194	2,451	2,409	2,410	2,387	2,433	2,493	2,714	-373	42	221
Gilbert High	2,317	2,157	2,130	2,153	1,883	2,342	2,402	2,416	2,419	2,297	2,237	2,005	25	-105	-232
Highland High	3,053	3,150	3,143	3,341	2,987	3,226	3,297	3,274	3,238	3,081	3,058	2,982	173	-168	-76
Mesquite High	1,862	1,701	1,546	1,505	1,184	1,448	1,397	1,312	1,213	1,159	1,131	1,275	-414	-317	144
Gilbert Classical Academy	314	315	335	385	304	416	420	420	420	420	420	420	102	4	0
Other	204	100	166	163	1,841	329	306	306	306	306	306	306	125	-23	0
Total	12,683	12,304	12,211	12,282	12,163	12,190	12,241	12,134	11,944	11,575	11,480	11,469	-493	-710	-11

Source: Applied Economics, 2022.

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

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