GILBERT PUBLIC SCHOOLS
DEMOGRAPHIC & ENROLLMENT ANALYSIS
2022/23

Final Report

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Executive Summary

The 2022/23 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 2032/33.

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

- Total K-12 enrollment in the District was 33,017 students in the fall of the 2022/23 school year, representing a one percent decrease (roughly 400 students) over last year; K-12 enrollment, however, remains 4.4 percent (1,500 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. At roughly 27,200 students this year, in-District enrollment has declined sharply (seven percent) since 2019/20 and now accounts for 82 percent of total enrollment, down from 85 percent in 2014/15.
- Compared to 2021/22, the total number of out-of-District students enrolled in the District increased by 222 students this year. The 5,862 out-of-District students that were enrolled in 2022/23 came from more than 15 metro area school districts. However, 60 percent of the out-of-District students came from the Mesa (2,300 K-12 students) and Higley Unified School Districts (1,200 K-12 students). 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 (577 students.
- Demographic data indicates a general aging of the District's population. Between 2000 and 2022, the share of the population under 5 years of age fell from 10.0 percent of the total population to 6.6 percent; 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 19 percent over the past 12 years. Persons 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 dropped to 26 percent in 2022. Meanwhile, the population over 44 years of age has grown significantly faster than all of the other age cohorts over the past 22 years, thereby increasing the share of this age group from about 23 percent in 2000 to 39 percent of the total population in 2022.
- There are currently 15 charter schools located within the District serving 7,100 K-12 students, and there are an additional 24 charter schools operating within one mile of District boundaries that serve another 11,900 K-12 students. Since 2010/11, total local charter enrollment has doubled, increasing by nearly 9,400 K-12 students over the past 12 years; the majority of that increase (78 percent) has occurred in charter schools located just outside of the District's boundaries. It is clear that charter enrollment growth has compounded the effect of aging-in-place in the District and has contributed to the waning enrollment at both the elementary and high school level. However, the number of charter schools located in and nearby the District has declined slightly since 2019/20 and total charter enrollment has declined by almost 700 students over the past three years.

- These projections call for the addition of 12,200 housing units over the next ten years, a 15 percent increase over the current inventory. The vast majority (70 percent) of new units added during the projection period are expected to be multifamily. Although both the occupancy rate and the population per household are expected to decline over the next ten years, due to the aging of the population and the influx of multifamily units, 10,900 new households are projected to yield a total District population of nearly 237,000 people by 2032/33, which represents an increase of 10 percent compared to 2022/23.

- 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 1.5 percent per year since 2014/15, dropping to 67.1 percent this year. Assuming a moderate service rate decline and a slight increase in out-of-District enrollment, the District is expected to experience a loss of about 2,800 students by 2032/33 (8.5 percent), yielding total enrollment of roughly 30,200 K-12 students. Enrollment is expected to decline in each of the next 10 years, dropping by an average of 0.9 percent per year during the projection period. The vast majority of the 10-year decline (71 percent) is expected to due to the loss of roughly 2,000 K-6 students.

- During the first half of the projection period, 21 of the 26 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 860 in-District K-6 students for the period. The largest enrollment gain is projected in the Boulder Creek (+400 students) attendance area and the largest losses are expected in the Canyon Rim and Greenfield attendance areas (-200 students each). In addition, out-of-District enrollment is expected to decline slightly by 2027/28. During the second half of the projection period, only the Boulder Creek attendance area is projected to see enrollment increase (+300 students); enrollment losses are expected in all of the remaining elementary attendance areas, resulting in a net loss of an additional 880 in-District K-6 students during the second five-year period. Out-of-District enrollment is also projected to decrease during the second half of the projection period, declining by about 200 students between 2027/28 and 2032/33.

- Ten-year enrollment projections for the junior and high school attendance areas are shown on Table 22. District 7-8 attendance area enrollment is expected to increase during the first five-year period (+300 students) and decline during the second five-year period (-500 students), resulting in the net loss of 200 students 7-8 over the next ten years. This enrollment decline is driven entirely by a decrease in in-District enrollment (-250 students), which is slightly offset by a net gain of roughly 50 out-of-District students during the same period. Enrollment declines over the 10-year period are expected in the Greenfield (-170 students), Highland (-110 students) and South Valley (-140 students) by 2032/33. Desert Ridge is the only 7-8 attendance area projected to experience an enrollment increase of any significance over the next 10 years (+160 students).

- Significant enrollment declines are projected at the high school level due to the loss of nearly 1,100 in-District 9-12 students over the next 10 years. Only the Desert Ridge attendance area is projected to experience an enrollment increase (+260 students) by 2032/33; losses in the remaining attendance areas range from 200 students (Mesquite) to 400 students (Gilbert). These losses are partially offset by a 500-student increase in out-of-District enrollment, most of which is expected to occur during the second half of the projection period.

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1.0 Introduction

The 2022/23 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.

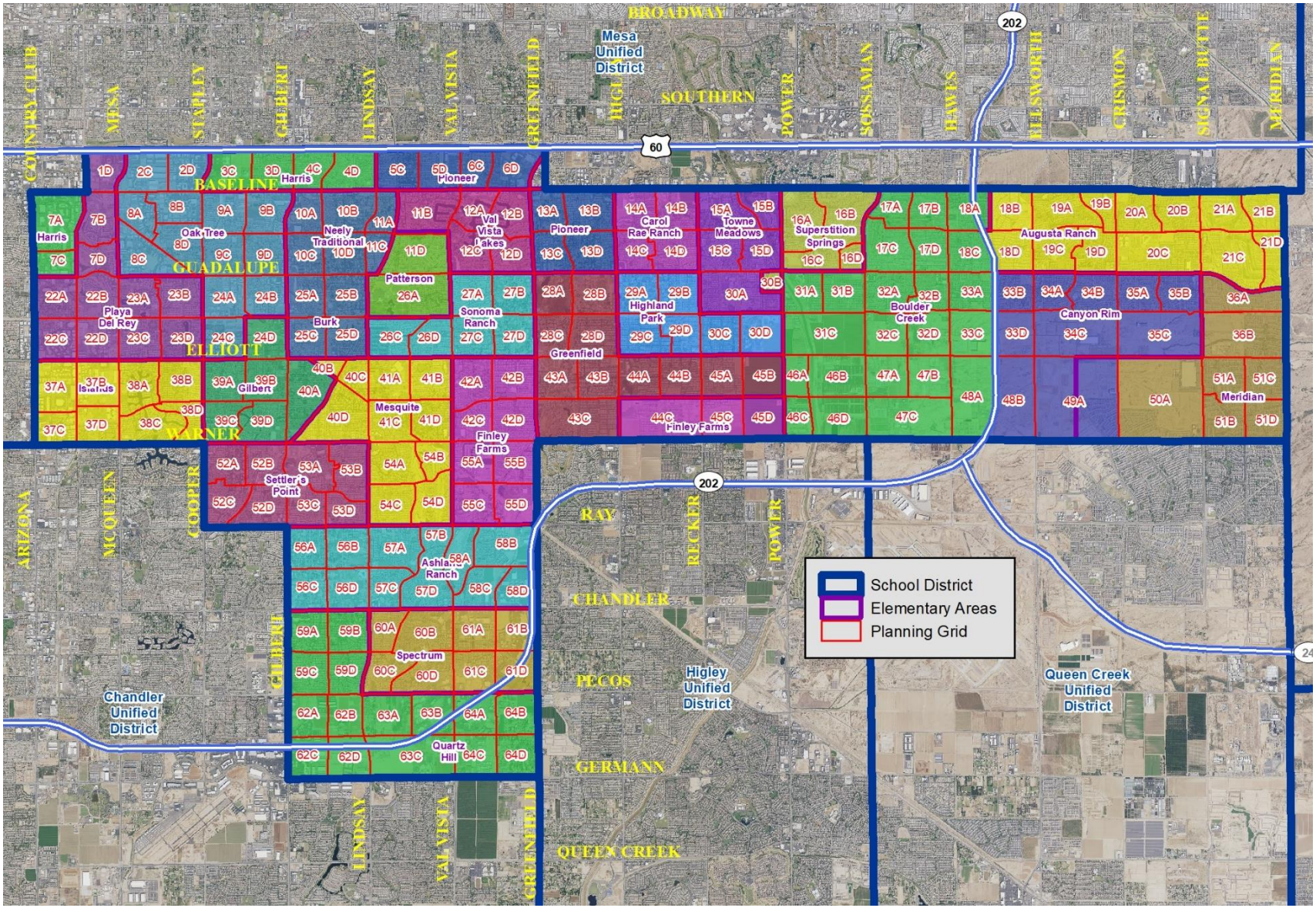
District Projections are provided in Section 4. These enrollment projections are created by combining the expected residential housing additions with the existing District population, accounting for regional and local trends in socioeconomic conditions and forecasts.

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



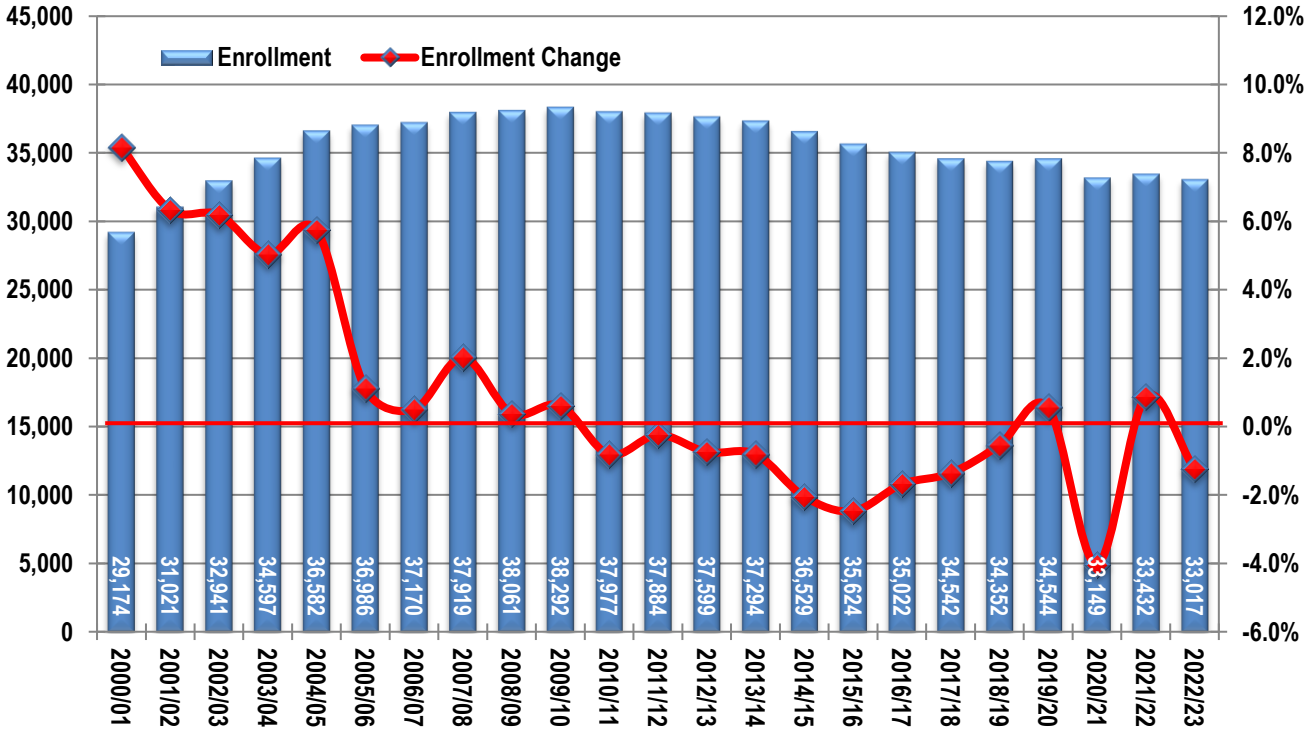
2.0 Existing Conditions

2.1 Enrollment

Total Kindergarten through 12th grade (K-12) enrollment in the District was 33,017 students in the fall of the 2022/23 school year, representing a one percent decrease (roughly 400 students) over last year; K-12 enrollment, however, remains 4.4 percent (1,500 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 8,000 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. Since 2018/19, enrollment in the District has declined sharply due to a 1,400-student pandemic-induced decline in 2020/21.

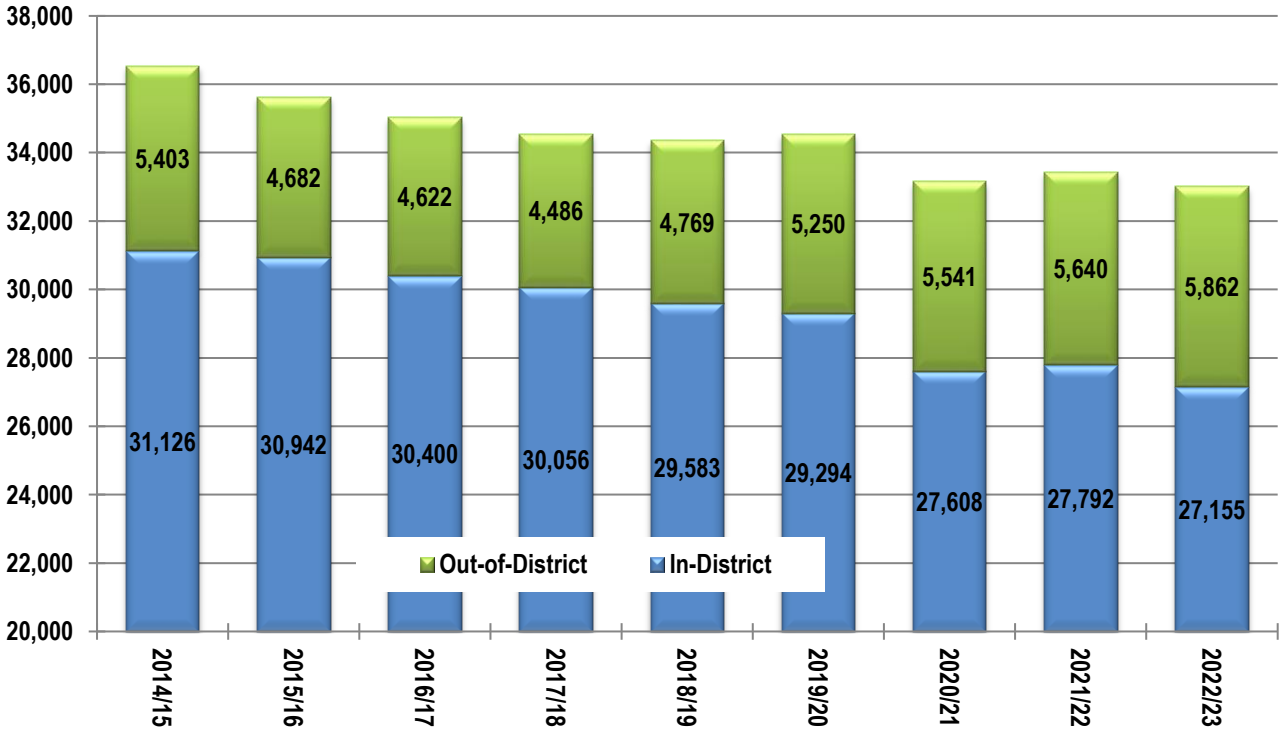
FIGURE 1
HISTORIC ENROLLMENT



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. At roughly 27,200 students this year, in-District enrollment has declined sharply (seven percent) since 2019/20 and now accounts for 82 percent of total enrollment, down from 85 percent in 2014/15. Out-of-District enrollment has been growing slowly 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. As a result, out-of-District enrollment now accounts for nearly 18 percent of total enrollment, up from 15 percent in 2014/15.

FIGURE 2
SOURCE OF DISTRICT ENROLLMENT



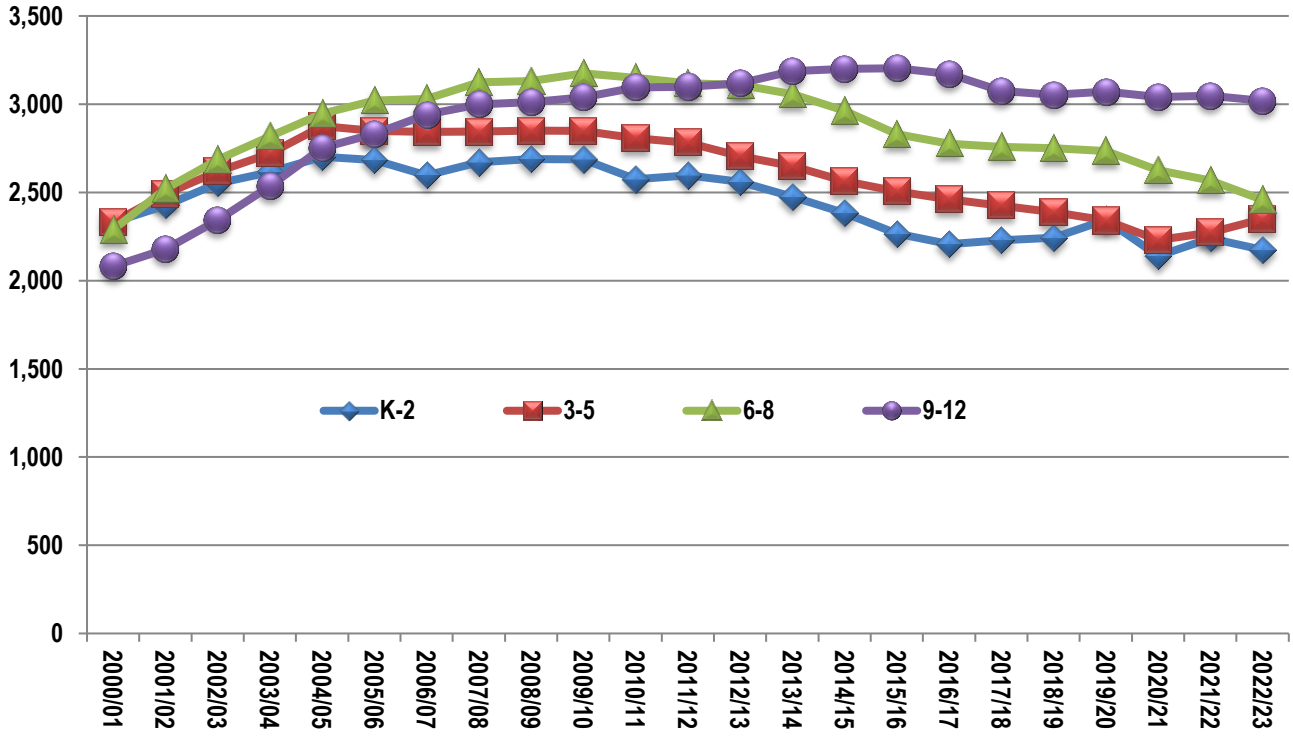
Sources: Gilbert Unified School District; Applied Economics.

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 (**Figure 3**), the differences between the three- and four-grade groupings are normalized.

Enrollment in each cohort was relatively equal in2000/01, with the exception of the 9-12 cohort which contained 200 to 300 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 resident population.

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 for the first time since 2015/16, but it has since declined by 1.7 percent to about 3,000 students per grade, its lowest point since 2007/08. A 100-student increase in average K-2 enrollment last year resulted in an increase in 3-5 grade-level enrollment this year. Although 2022/23 average 3-5 enrollment is roughly equal to average 3-5 enrollment in 2019/20, current grade-level enrollment in both the K-2 and 6-8 cohorts is well-below 2019/20 levels; the largest decline has been in the 6-8 cohort, where average enrollment has declined by 10 percent since 2019/20, while average K-2 enrollment has declined by seven percent.

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: 2022/23

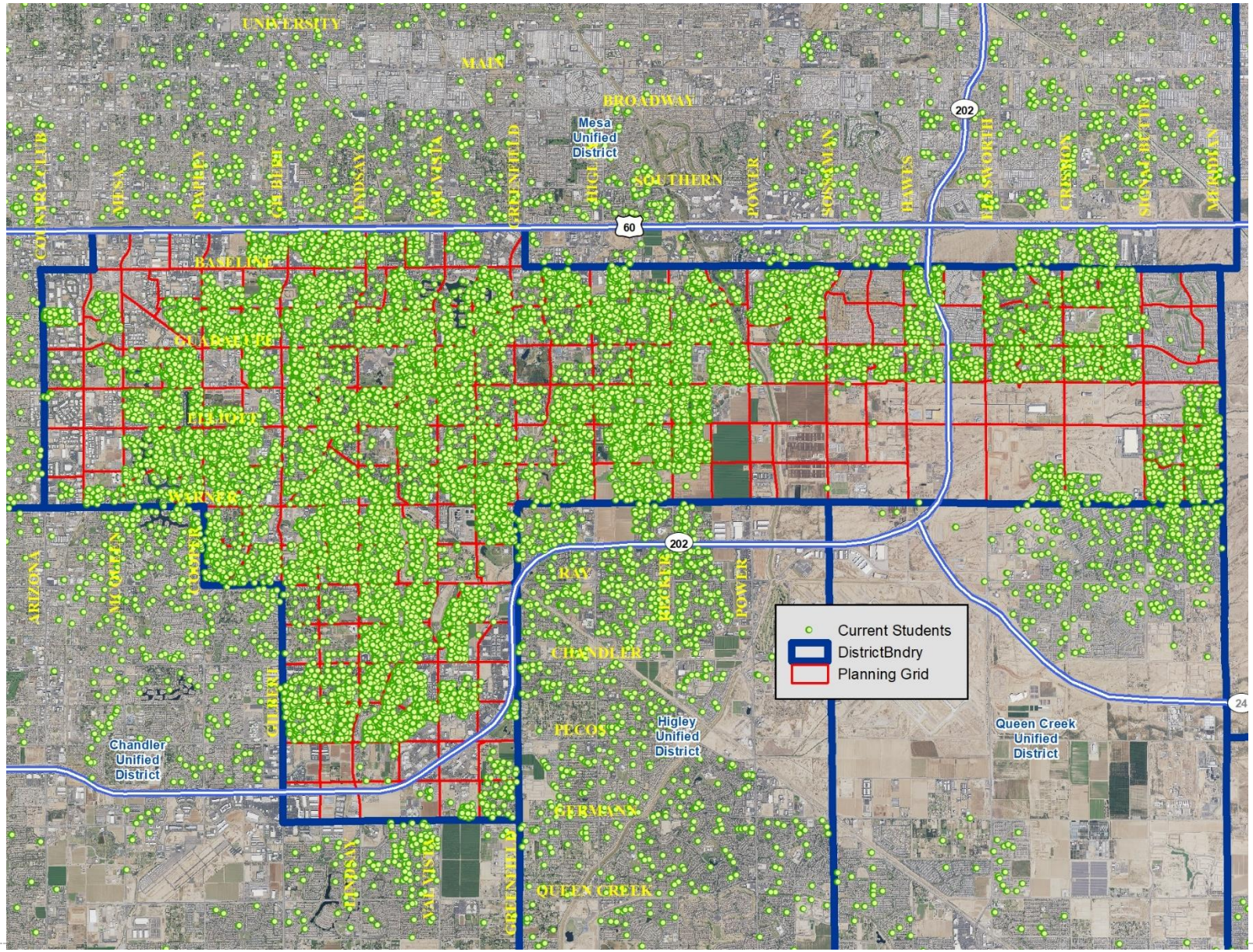


Table 1 shows the source of out-of-District enrollment by grade for the current school year. In all, the 5,862 out-of-District students that were enrolled in 2022/23 came from more than 15 metro area school districts. However, 60 percent of the out-of-District students came from the Mesa (2,300 K-12 students) and Higley Unified School Districts (1,200 K-12 students).

Compared to 2021/22, the total number of out-of-District students enrolled in the District increased by 222 students this year. 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, the largest out-of-District enrollment increase was seen in the 3rd (69 students), 4th (32 students) and 10th through 12th (roughly 30 students each) grades. Enrollment declines were most notable in the 2nd (-29 students) and 7th (-25 students) grades.

TABLE 1
SOURCE OF OUT-OF-DISTRICT ENROLLMENT BY GRADE: 2022/23

	Enrollment by Grade														2021/22	
District	KG	1	2	3	4	5	6	7	8	9	10	11	12	Total	Total	Change
Mesa Unified District	187	192	172	170	184	133	143	158	163	208	211	202	218	2,341	2,310	31
Higley Unified District	74	70	87	78	71	72	70	83	101	104	131	116	131	1,188	1,142	46
Chandler Unified District	50	50	47	71	63	62	50	50	68	89	95	122	115	932	888	44
Queen Creek Unified District	34	38	34	36	39	38	25	29	32	44	66	76	88	579	566	13
Apache Junction Unified District	23	28	16	28	15	22	18	29	37	35	46	38	40	375	338	37
Florence Unified School District	7	9	10	8	7	16	5	6	7	7	9	11	12	114	99	15
J. O. Combs Unified School Distric	6	4	7	10	8	8	10	7	6	11	16	14	11	118	109	9
Kyrene Elementary District	6	4	3	4	1	4	3	3	1	7	6	1	5	48	31	17
Tempe School District	2	5	2	6	3	5	4	1	1	5	2	5	3	44	53	-9
Phoenix Elementary District	0	1	0	0	0	0	1	0	0	0	1	2	2	7	13	-6
Roosevelt Elementary District	0	1	1	2	1	1	1	1	0	0	0	1	0	9	6	3
Maricopa Unified School District	1	0	3	1	3	1	2	1	1	2	0	1	1	17	7	10
Paradise Valley Unified District	0	0	0	0	0	0	0	0	0	2	1	1	0	4	4	0
Scottsdale Unified District	2	1	0	1	0	1	0	0	1	0	1	3	1	11	13	-2
Washington Elementary District	0	1	0	1	0	0	0	0	0	0	0	0	0	2	5	-3
Other	5	2	4	6	8	5	7	5	6	9	4	6	6	73	56	17
Total	397	406	386	422	403	368	339	373	424	523	589	599	633	5,862	5,640	222

Sources: Gilbert Public Schools, 2022; Applied Economics, 2023.

Since 2018/19, the number of out-of-District students coming from the Mesa Unified School District has increased by 32 percent (nearly 600 K-12 students); similarly substantial gains in the number of students enrolling from Chandler Unified (+33 percent or 200 students) and Apache Junction Unified (+67 percent or 150 students) have also occurred (**Table 2**).

TABLE 2
CHANGE IN OF OUT-OF-DISTRICT ENROLLMENT BY SOURCE

District	2018/19	2019/20	2020/21	2021/22	2022/23	Change 2018/19 - 2022/23
Mesa Unified District	1,772	2,021	2,164	2,310	2,341	569
Higley Unified District	1,125	1,142	1,167	1,142	1,188	63
Chandler Unified District	702	830	870	888	932	230
Queen Creek Unified District	586	574	598	566	579	-7
Apache Junction Unified District	225	291	296	338	375	150
Florence Unified School District	129	127	114	99	114	-15
J. O. Combs Unified School District	89	104	125	109	118	29
Kyrene Elementary District	31	55	39	31	48	17
Tempe School District	28	27	25	53	44	16
Phoenix Elementary District	10	13	7	13	7	-3
Roosevelt Elementary District	12	9	7	6	9	-3
Maricopa Unified School District	7	8	5	7	17	10
Paradise Valley Unified District	1	6	2	4	4	3
Scottsdale Unified District	13	6	14	13	11	-2
Washington Elementary District	3	6	2	5	2	-1
Other	36	31	106	56	73	37
Total	4,769	5,250	5,541	5,640	5,862	1,093

Sources: Gilbert Public Schools, 2022; Applied Economics, 2023.

Table 3 shows where out-of-District students were enrolled in 2022/23 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 (577 students), although that number is down nearly 50 students compared to 2021/22. Both the Neely Traditional and Gilbert Classical Academies continue to attract a large number of out-of-District K-12 students (roughly 160 students each). Compared to 2021/22, Canyon Valley High School saw the largest increase in out-of-District students (66 students) and the Gilbert Global Academy saw the largest decrease (down 62 students).

TABLE 3

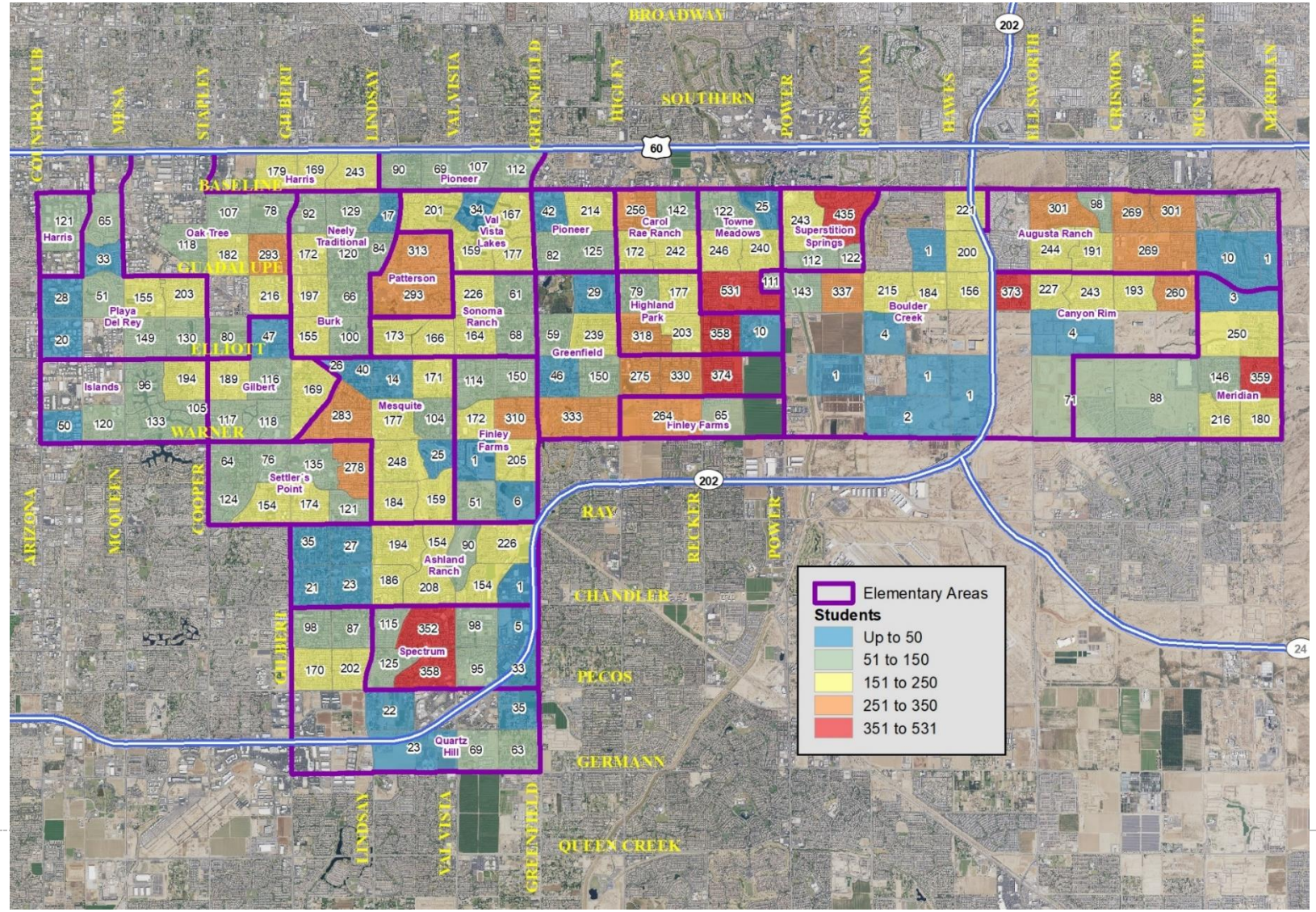
DESTINATION OF OUT-OF-DISTRICT ENROLLMENT BY GRADE: 2022/23

	KG	1	2	3	4	5	6	7	8	9	10	11	12	Total	2021/22 Total	Change
Ashland Ranch Elementary	21	10	17	15	15	18	15							111	82	29
Augusta Ranch Elementary	27	32	28	22	23	27	22							181	162	19
Boulder Creek Elementary	7	12	6	7	9	5	3							49	47	2
Burk Elementary	11	9	18	12	9	10	13							82	81	1
Campo Verde High School										104	120	100	111	435	382	53
Canyon Rim Elementary	17	24	19	11	26	17	15							129	104	25
Carol Rae Ranch Elementary	12	12	13	10	13	14	6							80	65	15
Desert Ridge High School										141	141	162	133	577	625	-48
Desert Ridge Junior High School								98	116					214	221	-7
Finley Farms Elementary	7	8	5	9	5	10	14							58	62	-4
Gilbert Elementary	26	32	24	22	24	18	15							161	141	20
Gilbert High School								2		81	85	81	95	344	361	-17
Greenfield Elementary	16	7	9	18	8	13	8							79	86	-7
Greenfield Junior High School								66	63					129	115	14
Harris Elementary	13	14	14	22	17	12	14							106	113	-7
Highland High School										91	123	92	114	420	405	15
Highland Junior High School								64	72					136	120	16
Highland Park Elementary	25	23	21	16	14	17	9							125	101	24
Houston Elementary	0	0	0	0	0	0	0							0	0	0
Islands Elementary	24	22	22	30	22	24	20							164	155	9
Meridian Elementary	22	19	22	27	23	16	20							149	104	45
Mesquite Elementary	10	9	6	12	12	6	10							65	61	4
Mesquite High School										67	73	93	64	297	294	3
Mesquite Junior High School								48	62					110	119	-9
Oak Tree Elementary	7	11	9	11	8	4	10							60	71	-11
Patterson Elementary	7	12	13	10	15	10	7							74	85	-11
Pioneer Elementary	11	17	12	12	19	8	12							91	106	-15
Playa del Rey Elementary	11	13	7	17	12	7	7							74	74	0
Quartz Hill Elementary	24	30	32	35	23	38	31							213	186	27
Settler's Point Elementary	6	7	2	9	6	9	6							45	47	-2
Sonoma Ranch Elementary	3	9	11	10	11	10	8							62	70	-8
South Valley Junior High School								72	81					153	138	15
Spectrum Elementary	5	6	10	9	12	7	13							62	72	-10
Superstition Springs Elementary	30	20	15	17	19	18	16							135	109	26
Towne Meadows Elementary	16	23	15	19	19	19	11							122	137	-15
Val Vista Lakes Elementary	11	6	5	12	14	11	10							69	62	7
Neely Traditional Academy	28	18	30	24	18	18	20							156	137	19
Gilbert Classical Academy								19	19	31	25	37	31	162	166	-4
Gilbert Global Academy		1	1	4	5	1	4	3	5	8	14	14	45	105	167	-62
Canyon Valley High School											7	20	39	66	0	66
Other	0	0	0	0	2	1	0	1	6	0	1	0	1	12	7	5
Total	397	406	386	422	403	368	339	373	424	523	589	599	633	5,862	5,640	222

Sources: Gilbert Public Schools, 2022; Applied Economics, 2023.

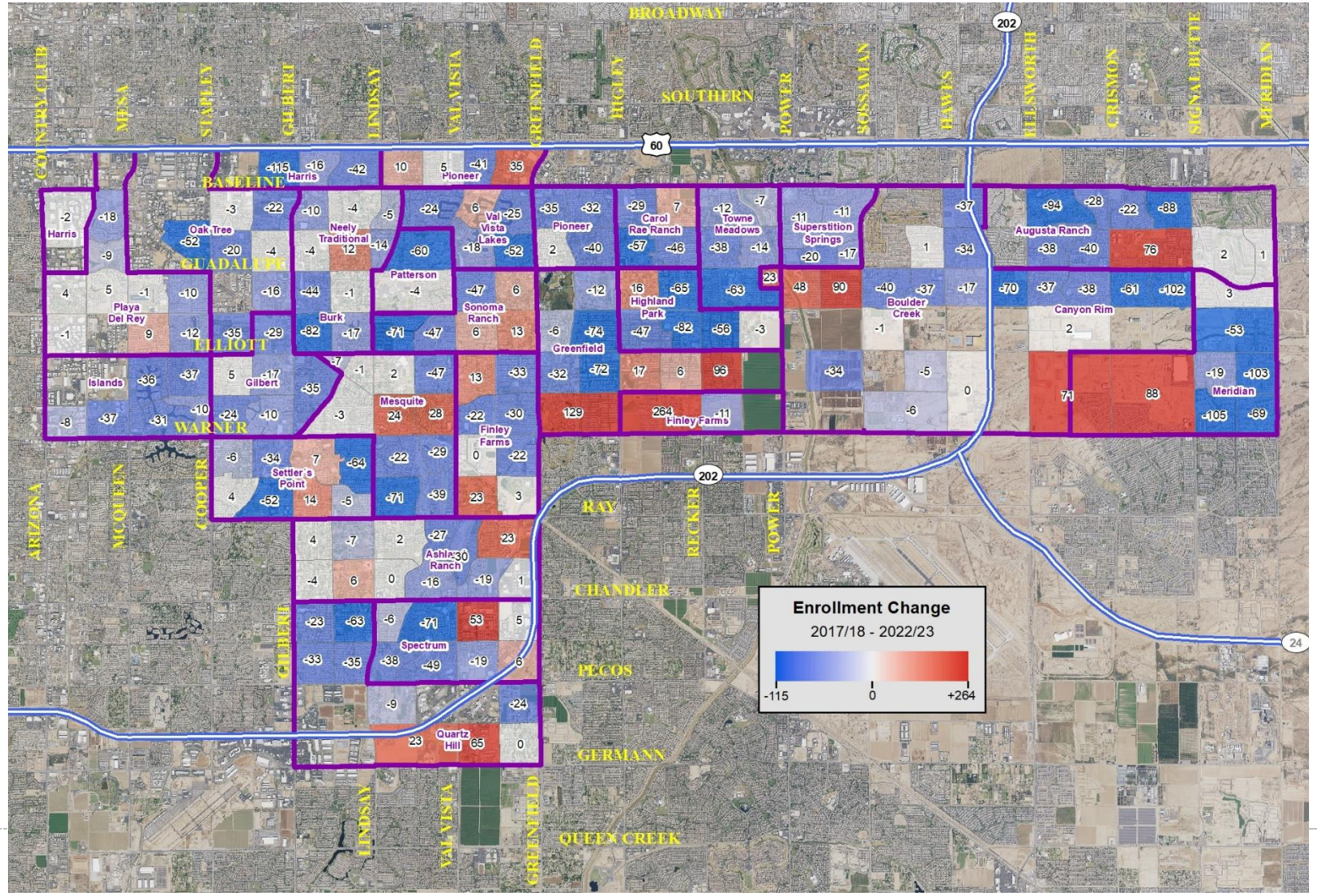
Map 3 normalizes the distribution of the student point data for in-District students, showing the number of K-12 District students coming from each grid. This map shows that enrollment is widely dispersed, with higher student concentrations generally in the central and eastern portions of the District and in the south where there has been new housing development activity.

MAP 3
ENROLLMENT DENSITY: 2022/23



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 2017/18, during which time aggregate K-12 losses totaled roughly 2,000 students. While areas of decline are widespread, pockets of enrollment growth, driven by new home construction, are concentrated in the central and eastern portions of the District, although there has also been substantial growth in a few areas south of Ray Road.

MAP 4
CHANGE IN ENROLLMENT: 2017/18 - 2022/23



2.2 Demographic Trends

Table 4 contains Census data on population and housing in the District for 2000, 2010 and 2020, and 2022 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. Since 2020, population growth has slowed further, dropping to an average of 1.0 percent per year, although growth in the number of housing units has increased slightly over the past two years. These trends have resulted in a decline in the District's population per household over the last 22 years.

TABLE 4
DEMOGRAPHIC TRENDS

	2000 Census	2010 Census	2020 Census	2022 Estimate	2000-2010 Total	2000-2010 Change*	2010-2020 Total	2010-2020 Change*	2020-2022 Total	2020-2022 Change*
Population	135,012	184,433	211,394	215,813	49,421	3.2%	26,961	1.4%	4,419	1.0%
Housing Units	47,996	69,306	79,324	82,175	21,310	3.7%	10,018	1.4%	2,851	1.8%
Households	44,552	63,380	73,918	76,012	18,828	3.6%	10,538	1.5%	2,094	1.4%
Population Per	3.03	2.91	2.86	2.84	-0.12	-0.4%	-0.05	-0.2%	-0.02	-0.4%

Sources: U.S. Bureau of the Census, 2000, 2010, 2020 and 2022; Applied Economics, 2023.
** Annual compound rate of change.

Roughly 66 percent of the District population in 2022 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 18.5 percent in 2022.The population of other racial groups remains comparatively small.

TABLE 5
DEMOGRAPHIC TRENDS – RACE & ETHNICITY

	2000 Census	2010 Census	2020 Census	2022 Estimate	2000-2010 Total	2000-2010 Change*	2010-2020 Total	2010-2020 Change*	2020-2022 Total	2020-2022 Change*
Population	135,012	184,433	211,394	215,813	49,421	3.2%	26,961	1.4%	4,419	1.0%
By Race & Ethnicity:										
White	81.9%	75.5%	67.6%	66.1%	28,793	2.3%	3,627	0.3%	-208	-0.1%
African American	2.3%	3.1%	3.1%	3.1%	2,570	6.2%	905	1.5%	153	1.2%
Native American	0.5%	0.8%	0.9%	0.9%	653	6.5%	444	2.8%	92	2.5%
Asian	3.3%	4.9%	5.4%	5.5%	4,561	7.4%	2,370	2.4%	466	2.0%
Hispanic	11.9%	15.7%	18.0%	18.5%	12,771	6.0%	9,063	2.8%	1,865	2.4%
Other	0.1%	0.1%	5.1%	5.9%	73	4.4%	10,552	48.4%	2,051	9.1%

Sources: U.S. Bureau of the Census, 2000, 2010, 2020 and 2022; Applied Economics, 2023.
* Annual compound rate of change.

The data also illustrates the general aging of the District's population, which began in the first 10-year period and has continued since 2010 (**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 6.7 percent; in 2022, this age group accounted for 6.6 percent of the total population. Along with the aging of the existing population, these declines are indicative of the sharp drop in birth rates that have generally persisted since 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 19 percent over the past 12 years. Persons 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 2010 and dropped to 26 percent in 2022. Meanwhile, the population over 44 years of age has grown significantly faster than all of the other age cohorts over the past 22 years, thereby increasing the share of this age group from about 23 percent in 2000 to 39 percent of the total population in 2022.

TABLE 6
DEMOGRAPHIC TRENDS – AGE

	2000 Census	2010 Census	2020 Census	2022 Estimate	2000-2010 Total	2000-2010 Change*	2010-2020 Total	2010-2020 Change*	2020-2022 Total	2020-2022 Change*
Population	135,012	184,433	211,394	215,813	49,421	3.2%	26,961	1.4%	4,419	1.0%
By Age:										
Age 0-4	10.0%	7.4%	6.7%	6.6%	104	0.1%	598	0.4%	29	0.1%
Age 5-13	16.9%	15.8%	13.1%	12.7%	6,327	2.5%	-1,339	-0.5%	-441	-0.8%
Age 14-17	6.3%	7.1%	6.2%	6.1%	4,678	4.5%	62	0.0%	-74	-0.3%
Age 18-24	7.7%	8.6%	9.0%	9.1%	5,431	4.3%	3,217	1.9%	588	1.5%
Age 25-44	36.4%	29.0%	26.7%	26.3%	4,482	0.9%	2,900	0.5%	223	0.2%
Age 45-64	16.8%	23.5%	25.4%	25.8%	20,604	6.7%	10,444	2.2%	2,005	1.8%
Age 65 Up	6.1%	8.7%	12.8%	13.5%	7,795	6.9%	11,078	5.4%	2,090	3.8%

Sources: U.S. Bureau of the Census, 2000, 2010, 2020 and 2022; Applied Economics, 2023.
* Annual compound rate of change.

Despite an increase 2020, the housing occupancy rate in 2022 is nearly the same as it was in 2000 (92.5 percent), as shown in **Table 7**. The percentage of owner-occupied housing has fallen from 78 percent in 2000 to about 64 percent in 2022. During the same 22-year time period, the share of renter-occupied units increased (from 15 to 28.5 percent) along with the share of multifamily housing units in the District (from 15.5 to 20 percent).

TABLE 7
DEMOGRAPHIC TRENDS – HOUSING UNITS

	2000 Census	2010 Census	2020 Census	2022 Estimate	2000-2010 Total	2000-2010 Change*	2010-2020 Total	2010-2020 Change*	2020-2022 Total	2020-2022 Change*
Housing Units	47,996	69,306	79,324	82,175	21,310	3.7%	10,018	1.4%	2,851	1.8%
Occupied	92.8%	91.4%	93.2%	92.5%	18,828	3.6%	10,538	1.5%	2,094	1.4%
Owner	78.1%	67.2%	65.6%	64.0%	9,076	2.2%	5,493	1.1%	554	0.5%
Renter	14.7%	24.3%	27.6%	28.5%	9,752	9.1%	5,045	2.7%	1,540	3.5%
Vacant	7.2%	8.6%	6.8%	7.5%	2,482	5.6%	-520	-0.9%	757	6.8%
By Unit Type:										
Single Family	84.5%	83.5%	81.1%	80.1%	17,272	3.6%	6,457	1.1%	1,556	1.2%
Multifamily	15.5%	16.5%	18.9%	19.9%	4,038	4.4%	3,561	2.7%	1,295	4.2%

Sources: U.S. Bureau of the Census, 2000, 2010, 2020 and 2022; Applied Economics, 2023.
* Annual compound rate of change.

There is a strong correlation between householder age and the presence of children in a household. Since 2000, the share of householders aged 25 to 45 years, generally considered the prime elementary parenting age group, has dropped from 56 percent to 33.5 percent in 2022 (**Table 8**); this is another sign of an aging population that can result in fewer young children and an increase in older children (more closely associated with the 45 to 54 age group). During the same 22-year period the share of persons over 64 years of age has doubled, increasing from just 11 percent in 2000 to nearly 22 percent in 2022.

Since 2000, the share of owner-householders in the District has declined from 84 percent to 69 percent in 2022; the corresponding increase in the share of renter-households can have a stabilizing effect on enrollment in the near-term since these households tend to turnover more frequently and are generally replaced by households that are demographically similar (younger, possibly with young children); this contrasts with owner-households that tend to age in place, allowing children in the household to progress through the grade levels.

TABLE 8
DEMOGRAPHIC TRENDS – HOUSEHOLDS

	2000 Census	2010 Census	2020 Census	2022 Estimate	2000-2010 Total	2000-2010 Change*	2010-2020 Total	2010-2020 Change*	2020-2022 Total	2020-2022 Change*
Households	44,552	63,380	73,918	76,012	18,828	3.6%	10,538	1.5%	2,094	1.4%
By Age of Householder:										
15 to 24	3.7%	3.8%	3.2%	3.1%	744	3.8%	-67	-0.3%	-12	-0.3%
25 to 34	26.0%	17.7%	15.9%	15.5%	-378	-0.3%	540	0.5%	50	0.2%
35 to 44	30.1%	24.8%	18.9%	17.9%	2,335	1.6%	-1,734	-1.2%	-375	-1.3%
45 to 54	19.2%	23.8%	22.4%	22.2%	6,498	5.8%	1,535	1.0%	264	0.8%
55 to 64	10.1%	15.0%	19.0%	19.7%	5,021	7.8%	4,520	4.0%	928	3.3%
65 to 74	6.7%	8.7%	12.0%	12.5%	2,571	6.4%	3,362	4.9%	572	3.2%
Over 75	4.2%	6.2%	8.5%	9.2%	2,037	7.6%	2,383	4.9%	667	5.2%
Owners by Age:	84.1%	73.5%	70.4%	69.2%	9,076	2.2%	5,493	1.1%	554	0.5%
15 to 24	1.6%	1.0%	0.6%	0.5%	-73	-1.1%	-220	-4.2%	-39	-4.9%
25 to 34	20.9%	9.7%	8.1%	7.7%	-3,193	-4.1%	-124	-0.2%	-165	-1.4%
35 to 44	25.9%	17.8%	12.8%	11.9%	-250	-0.2%	-1,830	-1.8%	-452	-2.4%
45 to 54	16.7%	19.2%	16.5%	15.9%	4,749	5.1%	13	0.0%	-157	-0.6%
55 to 64	9.1%	12.7%	14.8%	14.9%	3,990	7.1%	2,866	3.1%	428	1.9%
65 to 74	6.1%	7.7%	10.1%	10.2%	2,175	6.1%	2,565	4.3%	327	2.2%
Over 75	3.9%	5.4%	7.6%	8.2%	1,678	7.0%	2,223	5.2%	611	5.3%
Renters by Age:	15.9%	26.5%	29.6%	30.8%	9,752	9.1%	5,045	2.7%	1,540	3.5%
15 to 24	2.2%	2.8%	2.6%	2.6%	817	6.4%	153	0.8%	27	0.7%
25 to 34	5.1%	8.0%	7.8%	7.9%	2,815	8.4%	664	1.2%	215	1.8%
35 to 44	4.2%	7.0%	6.1%	6.1%	2,585	9.1%	95	0.2%	76	0.8%
45 to 54	2.5%	4.5%	5.9%	6.3%	1,749	9.9%	1,522	4.4%	422	4.7%
55 to 64	1.0%	2.3%	4.2%	4.7%	1,031	13.1%	1,654	7.9%	500	7.7%
65 to 74	0.6%	1.1%	2.0%	2.2%	396	9.4%	797	8.2%	244	8.0%
Over 75	0.4%	0.8%	0.9%	1.0%	359	12.2%	159	2.7%	56	4.0%
Population Per	3.03	2.91	2.86	2.84	-0.12	-0.4%	-0.05	-0.2%	-0.02	-0.4%

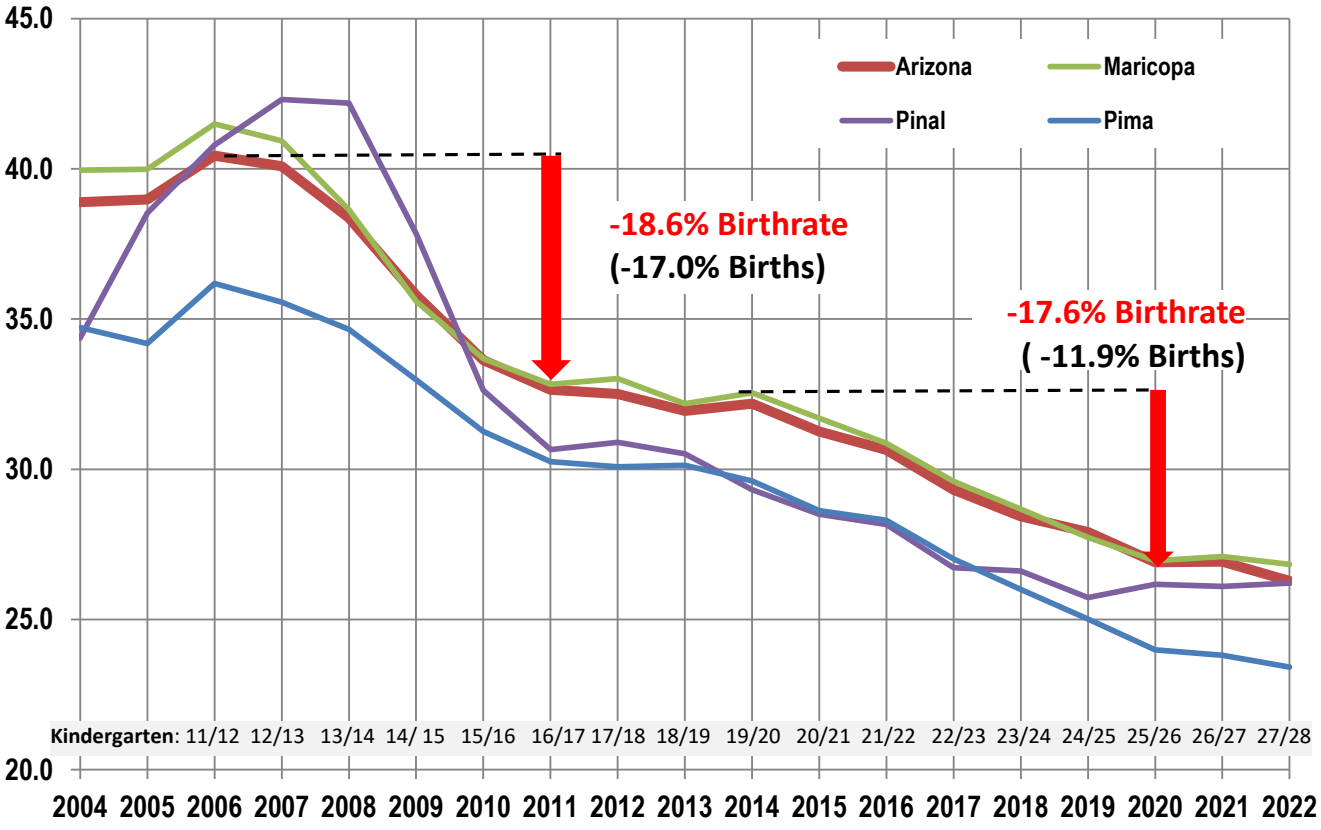
Sources: U.S. Bureau of the Census, 2000, 2010, 2020 and 2022; Applied Economics, 2023.
* Annual compound rate of change.

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. During this time, the number of births Statewide declined from 102,700 to 85,100 per year.

Between 2011 and 2014 the rate was fairly stable, but 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, lower the number of births statewide to 76,400. Birthrates have nearly stabilized between 2020 and 2022 with the number of births rising to 78,200 Statewide. More time is needed to determine if it will remain stable, or perhaps even increase.

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 compared to 2019/20 levels.

FIGURE 4
BIRTHRATES IN ARIZONA AND SELECTED COUNTIES



Sources: Arizona Department of Health Services; U.S. Census Bureau; Applied Economics, 2023.

2.3 Alternative Providers

There are currently 15 charter schools located within the District serving 7,100 K-12 students, and there are an additional 24 charter schools operating within one mile of District boundaries that serve another 11,900 K-12 students, as listed on **Table 9**. Combined, these schools currently serve roughly 19,000 K-12 students. The largest of the charters in the District is Eduprize Schools Gilbert, with enrollment of 1,400 students, followed by Legacy Traditional School-East Mesa, which currently enrolls roughly 1,000 K-8 students in the District.

The largest school located within one mile of the District's boundaries is American Leadership Academy-Gilbert North; this campus, located on Higley Road, is home to two schools that enrolled a total of nearly 2,500 K-12 students at the beginning of the 2022/23 school year. In addition, six other nearby charter schools currently enroll 600 or more students each.

Since 2010/11 total local charter enrollment has doubled, increasing by nearly 9,400 K-12 students over the past 12 years (**Table 10**); the majority of that increase (78 percent) has occurred in charter schools located just outside of the District's boundaries. It is clear that charter enrollment growth has compounded the effect of aging-in-place in the District and has contributed to the waning enrollment at both the elementary and high school level. However, the number of charter schools located in and nearby the District has declined slightly since 2019/20 and total charter enrollment has declined by almost 700 students over the past three years. While the 300-student decline in 2020/21 can be attributed to the anomalous effects of the pandemic, it is interesting to note that these students appear to have not returned to local charter schools. The nearly 400-student loss this year was driven by the closure of two small, nearby charter schools and rather substantial enrollment declines at three schools (Eduprize, Noah Webster and ALA Gilbert North 7-12).

Figure 5 shows that the enrollment growth in local charter schools is heavily concentrated in the elementary grades. Although K-8 enrollment continues to comprises the vast majority (81 percent) of the total local charter students, the share is down from roughly 85 percent in 2017/18, which had persisted for several years. Over the past five years, 9-12 enrollment in local charter schools has increased by nearly 1,000 students, bringing the total to roughly 3,600 students, or 19 percent of total charter enrollment.

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	605
Challenger Basic School	1315 N. Greenfield Road	Gilbert	85234	K-6	320
Desert Hills High School	1515 S. Val Vista Drive	Gilbert	85296	9-12	264
Eduprize Schools Gilbert	580 W. Melody Avenue	Gilbert	85233	K-12	1,415
Gilbert Arts Academy	862 E. Elliot Road	Gilbert	85234	K-8	176
Great Hearts Academies - Archway Arete	4525 E. Baseline Road	Gilbert	85234	K-5	538
Great Hearts Academies - Arete Prep	4525 E. Baseline Road	Gilbert	85234	6-12	558
Liberty Arts Academy	3015 S. Power Road	Mesa	85212	K-8	349
Noah Webster Schools - Mesa	7301 E. Baseline Road	Mesa	85209	K-6	574
San Tan Charter School - Recker Campus	3959 E. Elliot Road	Gilbert	85234	K-6	463
San Tan Charter School - Power Campus	3232 Power Road	Gilbert	85234	7-12	405
Legacy Traditional School - East Mesa	10707 E. Guadalupe Road	Mesa	85209	K-8	1,045
Leman Academy of Excellence-East Mesa	3761 S. Power Road	Mesa	85212	K-8	220
The French American Academy	2031 N. Arizona Avenue	Chandler	85225	K-4	48
Freedom Preparatory Academy	465 N. Bluejay Drive	Gilbert	85234	7th-11th	159
In-District Total					7,139
Area Charter Schools*					
American Leadership Academy - Gilbert K-6	3155 S. Santan Village Parkway	Gilbert	85295	K-6	641
American Leadership Academy - Gilbert North K-6	1010 S. Higley Road	Gilbert	85296	K-6	850
American Leadership Academy - Gilbert North 7-12	1070 S. Higley Road	Gilbert	85296	7-12	1,624
American Leadership Academy - Mesa K-6	4507 S. Mountain Road	Mesa	85212	K-6	412
AZ Compass Prep School	2020 N. Arizona Avenue	Chandler	85225	7-12	247
BASIS Mesa	5010 S. Eastmark Parkway	Mesa	85212	K-12	837
Burke Basic School	131 E. Southern Avenue	Mesa	85210	K-6	694
Great Hearts Academies - Archway Lincoln	2250 S. Gilbert Road	Chandler	85286	K-5	735
Great Hearts Academies - Lincoln Prep	2250 S. Gilbert Road	Chandler	85286	6-11	536
Imagine East Mesa Elementary	9701 E. Southern Avenue	Mesa	85208	K-6	627
Imagine East Mesa Middle	9701 E. Southern Avenue	Mesa	85208	7-8	120
Intelli-School Chandler	1727 N. Arizona Avenue	Chandler	85225	9-12	51
Leading Edge Academy Gilbert Early College	717 W. Ray Road	Gilbert	85233	9-12	219
Leading Edge Academy Gilbert Elementary	717 W. Ray Road	Gilbert	85233	K-8	321
Learning Foundation and Performing Arts - Gilbert	4055 E. Warner Road	Gilbert	85296	7-12	396
Learning Foundation and Performing Arts - Warner	3939 E. Warner Road	Gilbert	85296	K-6	340
Legacy Traditional School - North Chandler	1900 N. McQueen Road	Chandler	85225	K-8	925
Montessori Education Centre Charter School - Mesa	2834 E. Southern Avenue	Mesa	85204	K-6	250
Pathfinder Academy at Eastmark	4816 S. Eastmark Parkway	Mesa	85212	K-6	345
Sequoia Charter Elementary School	1460 S. Horne Street	Mesa	85204	K-6	361
Sequoia Secondary School	1460 S. Horne Street	Mesa	85204	7-12	371
Sun Valley High School	1143 Lindsay Road	Mesa	85204	9-12	372
Val Vista Academy	4120 S. Val Vista Drive	Gilbert	85297	K-8	418
Vector Prep & Arts Academy	2020 N. Arizona Avenue	Chandler	85225	K-6	220
Area Total					11,912
Grand Total					19,051

Source: Arizona Department of Education; Applied Economics 2023.

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

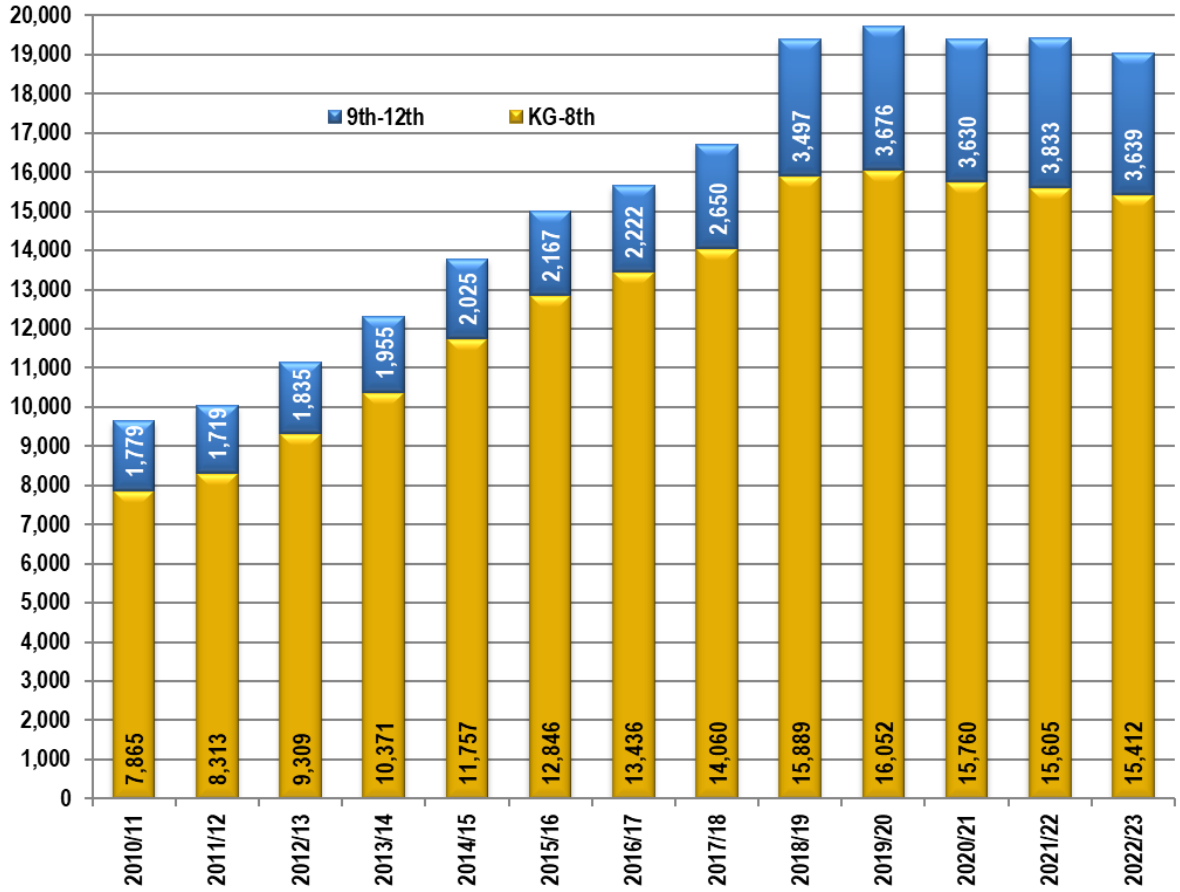
TABLE 10
ENROLLMENT IN LOCAL CHARTER SCHOOLS BY LEVEL

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	358
2011/12	14	5,201	87.6%	738	12.4%	5,939	323
2012/13	14	5,432	87.9%	749	12.1%	6,181	242
2013/14	13	5,414	89.8%	618	10.2%	6,032	-149
2014/15	13	5,834	92.5%	470	7.5%	6,304	272
2015/16	13	6,066	91.8%	544	8.2%	6,610	306
2016/17	12	6,009	90.6%	620	9.4%	6,629	19
2017/18	12	5,680	89.6%	658	10.4%	6,338	-291
2018/19	16	6,474	87.8%	903	12.2%	7,377	1,039
2019/20	16	6,584	87.4%	950	12.6%	7,534	157
2020/21	15	6,414	87.3%	937	12.7%	7,351	-183
2021/22	15	6,308	85.9%	1,037	14.1%	7,345	-6
2022/23	15	6,125	85.8%	1,014	14.2%	7,139	-206
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	77.6%	2,693	22.4%	12,039	-155
2021/22	26	9,297	76.9%	2,796	23.1%	12,093	54
2022/23	24	9,287	78.0%	2,625	22.0%	11,912	-181
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	41	15,889	82.0%	3,497	18.0%	19,386	2,676
2019/20	42	16,052	81.4%	3,676	18.6%	19,728	342
2020/21	41	15,760	81.3%	3,630	18.7%	19,390	-338
2021/22	41	15,605	80.3%	3,833	19.7%	19,438	48
2022/23	39	15,412	80.9%	3,639	19.1%	19,051	-387

Source: Arizona Department of Education; Applied Economics 2023.

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

FIGURE 5
DISTRIBUTION OF TOTAL CHARTER ENROLLMENT BY LEVEL



Source: Arizona Department of Education; Applied Economics, 2023.

In addition to charter schools, there are six private schools operating in the District, which enroll approximately 400 students and two private schools located within roughly one mile of the District's boundary that enroll nearly 1,400 K-12 students (**Table 11**). The largest of these schools, Gilbert Christian School, operates just outside of the District (near the Loop 202) and currently enrolls nearly 1,300 K-12 students.

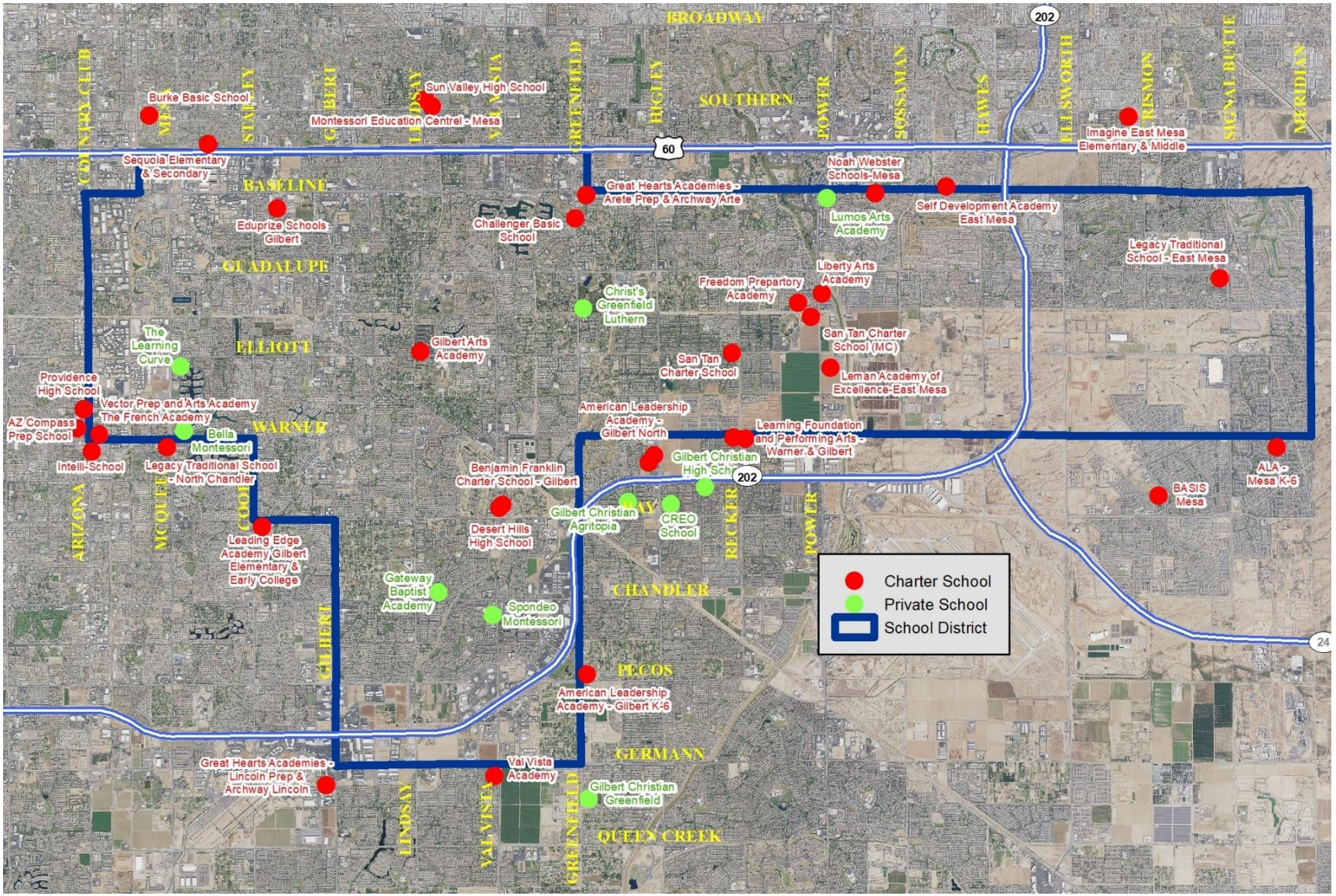
TABLE 11
ENROLLMENT IN LOCAL PRIVATE SCHOOLS

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
Wilkins Learning Center	730 S. Cooper Road	Gilbert	85233	PK-K	11
In-District Total					438
Area Private Schools*					
Gilbert Christian Schools	3632 E. Jasper Drive	Gilbert	85296	PK-12	1,287
Creo Montessori School	1475 S. Higley Road	Gilbert	85296	PK-6	92
Area Total					1,379
Total					1,817

Sources: NCES Private School Universe Survey (PSS), 2019-20 school year data; Private School Review, 2023; National Council for Private School Accreditation, 2023; Applied Economics 2023.
* Private schools located within approximately one mile of the District's boundaries.

The locations of all local, non-District (charter and private) schools are shown on **Map 5**. As is typical, many of these alternative providers are located in close proximity to major transportation corridors and in areas with higher population densities. 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



3.0 Residential Development

3.1 Market Conditions

Population growth in Arizona is shown on **Table 12**. Economic conditions that drive job-based in-migration cause growth levels to fluctuate from year to year, most recently with the severe decline due to the 2007-2009 recession, followed by a significant rebound 2015 to 2019. Population increases in 2021 were very similar to overall annual changes since 1980 in the Sun Corridor counties, except for Pinal County, which grew by nearly 11,000 persons in 2021, while the overall growth rate since 1981 was 8,400 persons annually. Census data shows that four of the ten fastest growing cities in the country include Queen Creek and Buckeye at opposite sides of the metropolitan area, along with Casa Grande and Maricopa in Pinal County. As the metro area matures, residential growth is increasingly occurring in the outer suburbs.

TABLE 12
POPULATION GROWTH IN THE SUN CORRIDOR

Population	1985	1990	1995	2000	2005	2010	2015	2020	2021
Maricopa County	1,781,049	2,132,273	2,498,964	3,092,927	3,577,074	3,824,083	4,076,400	4,436,704	4,507,419
Pima County	577,370	668,187	750,399	848,375	940,004	981,015	1,005,920	1,045,589	1,058,318
Pinal County	101,139	116,996	143,933	182,435	250,195	375,541	387,993	428,220	439,128
Yavapai County	83,711	108,647	133,151	169,520	196,629	210,919	218,182	237,073	241,173
Arizona	3,122,537	3,682,913	4,279,799	5,175,581	5,924,476	6,398,985	6,701,021	7,176,401	7,285,370
Average Annual Change	**1980-1985**	**1985-1990**	**1990-1995**	**1995-2000**	**2000-2005**	**2005-2010**	**2010-2015**	**2015-2020**	**2021**
Maricopa County	53,221	70,245	73,338	118,793	96,829	49,402	50,463	72,061	70,715
Pima County	8,191	18,163	16,442	19,595	18,326	8,202	4,981	7,934	12,729
Pinal County	1,939	3,171	5,387	7,700	13,552	25,069	2,490	8,045	10,908
Yavapai County	3,002	4,987	4,901	7,274	5,422	2,858	1,453	3,778	4,100
Arizona	78,115	112,075	119,377	179,156	149,779	94,902	60,407	95,076	108,969

Source: Arizona Commerce Authority; U.S. Bureau of the Census; Applied Economics, 2022.

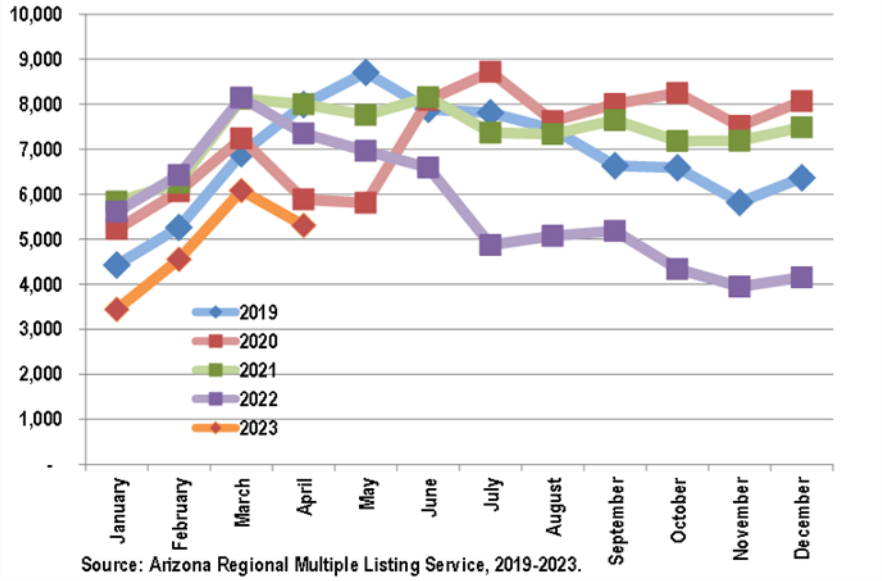
Employment growth is the primary driver for in-migration. In the first six months of 2022 the civilian labor force in Arizona grew by 41,600 persons including 31,200 in the Phoenix metropolitan region. The unemployment rate fell to 3.3 percent in the state, and 3.4 percent in the Phoenix metro region, after falling below 3.0 percent for three months. Substantial growth has occurred in the Manufacturing, Information, Business Services, and Education and Health Services sectors, which offer more stability and higher wages than Hospitality and Personal Service jobs.

During the pandemic, tech companies worldwide grew by 2.3 times more than non-tech companies. Phoenix has been ranked as one of the top emerging ecosystems in the world based on early-stage venture capital funding. Technology-based companies and suppliers can now be found in all parts of the metropolitan region with facilities being built, expanded, and planned. In addition, the Phoenix metro area has seen a significant increase

in manufacturing projects versus advanced business services industries that dominated economic development in the region for the past decade.

Strong economic conditions overall have affected the housing market, which had largely recovered from the recession period prior to the Covid 19 pandemic. **Figure 6** shows the general patterns of house sales have been similar year to year with increased activity in Spring and slower sales late in the year. In 2020 the market dropped suddenly in the second quarter due to pandemic lockdowns, but recovered quickly and entered an extended period of high sales activity. High demand, as well as construction labor and supply constraints, have led to imbalances and escalating prices; coupled with increased mortgage rates in early 2022, these trends have resulted in declining sales. Sale prices at $455,400 in April 2023 for existing houses are up from previous months but still below levels from last fall. Listings have dropped to less than a three-month supply, well below normal market levels.

FIGURE 6
SALES OF SINGLE FAMILY HOMES



Source: Arizona Regional Multiple Listing Service, 2019-2023.

Rental properties, where younger households are often formed, have also been subject to shortages and price escalation. Rental rates in metropolitan Phoenix increased by nearly 30 percent in 2021 according to the Arizona Republic. Projections are for significant increases again in 2022 given a vacancy rate of about 3 percent, though the rate of increase appears to be moderating. Declining investor activity could provide some financial relief in the rental market.

The current market is shifting and the various mixed signals lead to concerns about a recession and a housing market crash. However, the current market is not the same as what existed in 2007. While there is a downturn related to prices and interest rates, both are expected to stabilize over the next 12 to 18 months, population and employment are growing, and housing supply remains below normal levels. Declines in housing prices may be thought of as a correction from the excessive increases seen in the past 2 to 3 years. A significant portion of those increases are likely attributable to investor purchases, which reached nearly 30 percent of house sales in Phoenix

in early 2022. Falling home prices are expected to be accompanied by decreased investor activity. While the economy may slow, current estimates suggest a relatively mild correction while pricing and interest rates stabilize.

The local housing market will continue to face challenges, including material costs and shortages, labor availability, and the approval of new projects. These issues, along with the cost and availability of land, will affect the market in terms of what type of housing is built and where it will be located, and those factors will affect the characteristics of new households.

The single family market is facing an affordability problem since the rapid price increases combined with higher interest rates have priced many consumers out of the market, primarily first-time buyers. All parts of the metro region will be affected to varying extents, although the largest impacts on new construction are expected in the outer areas, including Pinal County and the West Valley. The large new tracts of State Land opening for development in the northern and eastern portions of the metro region may help, but probably not significantly due to the high auction prices.

Technological and design approaches are expected to be used to address affordability issues. Construction of smaller houses on smaller lots is already common, and houses arranged in a "cluster" pattern (which uses less land) are also becoming more common. In addition, new building components are being tested that enable the use of less material or labor. Builders are also experimenting with 3-D printing and modular construction. It became very clear during the pandemic that home builders can be very innovative when confronting problems, and that remains true.

Two major trends have emerged in the rental market over the last several years. Apartments have typically been the low-cost choice of housing for college students and young couples saving for their first house. While that is still often the case, many new apartment complexes are lifestyle properties with high rents that are justified by extensive amenities, such as business and fitness centers, spas, and movie theatres. Since the 2007-2009 recession, most of the large-scale complexes built in the metro area have been high-end properties that are marketed to young professionals and other renters by choice, rather than families.

The other primary rental property trend involves single family rentals, which include two main product types. The first are fairly typical subdivisions except they are built specifically as rental properties. These houses may be multi-story and are comparable in size to other nearby houses; these homes are likely to attract families who are evaluating an area or saving money for a house purchase. The now dominant build-to-rent (BTR) type is the single-story bungalow complex, sometimes called "horizontal apartments", that originated in Arizona around 2010 after the housing market collapse. This market segment is expanding rapidly, and local inventory is expected to double within two years.

The local housing market is confronted by a variety of issues, primarily affordability, and conditions continue to shift as new practices are introduced. Overall, however, demand remains strong based on current economic conditions and supply constraints are being addressed via multiple approaches.

3.2 Housing Construction

Housing construction activity in the District over the past decade is shown on **Table 13**, measured by building permits. The housing categories are intended to allow the correlation of new units to 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 older children. The student population per housing unit estimates are associated to the unit type, although exceptions are made in certain specific cases. Group quarter facilities, such as nursing homes or dormitories, are not included as either retirement or multifamily housing.

The volume of single family housing has been fairly consistent in recent years but as the market has become more built-out it is being rivaled by multifamily additions, with a nearly equal number of new units being added in each housing type. Age-restricted housing has fallen off in the last two years as retirement subdivisions have been completed.

TABLE 13
HOUSING PERMITS

Housing Type	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	Total
Family Housing											
Single Family 2 du/ac or less	26	11	10	8	14	2	-	-	18	6	95
Single Family 2.01 - 3.5 du/ac	147	175	122	150	162	56	161	250	177	71	1,471
Single Family 3.51 - 4.5 du/ac	41	121	239	196	235	393	161	221	206	241	2,054
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	37	592
Single Family Attached	-	-	-	-	6	70	140	151	258	179	804
Total Single Family	214	309	569	755	785	675	678	1,028	872	534	6,419
Condominium/Townhouse	-	26	42	7	31	15	-	8	-	-	129
Rental SF/BTR	-	-	-	-	116	40	-	369	165	-	690
Standard Courtyard Apts	107	524	200	278	687	-	-	-	216	205	2,217
Urban/Lifestyle Apts	-	254	148	238	252	104	297	380	859	-	2,532
Total Multifamily	107	804	390	523	1,086	159	297	757	1,240	205	5,568
Total Non-Age-Restricted	321	1,113	959	1,278	1,871	834	975	1,785	2,112	739	11,987
Age-Restricted Housing											
Single Family 2.01 - 3.5 du/ac	38	55	85	63	98	16	8	-	-	-	363
Single Family 3.51 - 4.5 du/ac	25	7	6	8	-	29	39	3	-	-	117
Single Family 4.51 - 6 du/ac	-	-	-	-	-	-	-	-	-	-	-
Single Family 6.01du/ac & Over	6	31	22	39	-	-	-	-	-	-	98
Single Family Attached	40	30	27	8	-	-	-	22	-	-	127
Condominium/Townhouse	-	-	-	-	20	52	55	2	-	-	129
Total Age-restricted	109	123	140	118	118	97	102	27	-	-	834
Total	430	1,236	1,099	1,396	1,989	931	1,077	1,812	2,112	739	12,821

Sources: Maricopa Association of Governments; Construction Monitor; Maricopa County Assessor; Applied Economics, 2023.

Viewing single family permits on **Table 13B** by quarter shows a rapidly declining level of construction activity which is caused by the shift from large subdivisions of production housing to small infill properties. This is also a result of buildout conditions and the lack of available large development parcels.

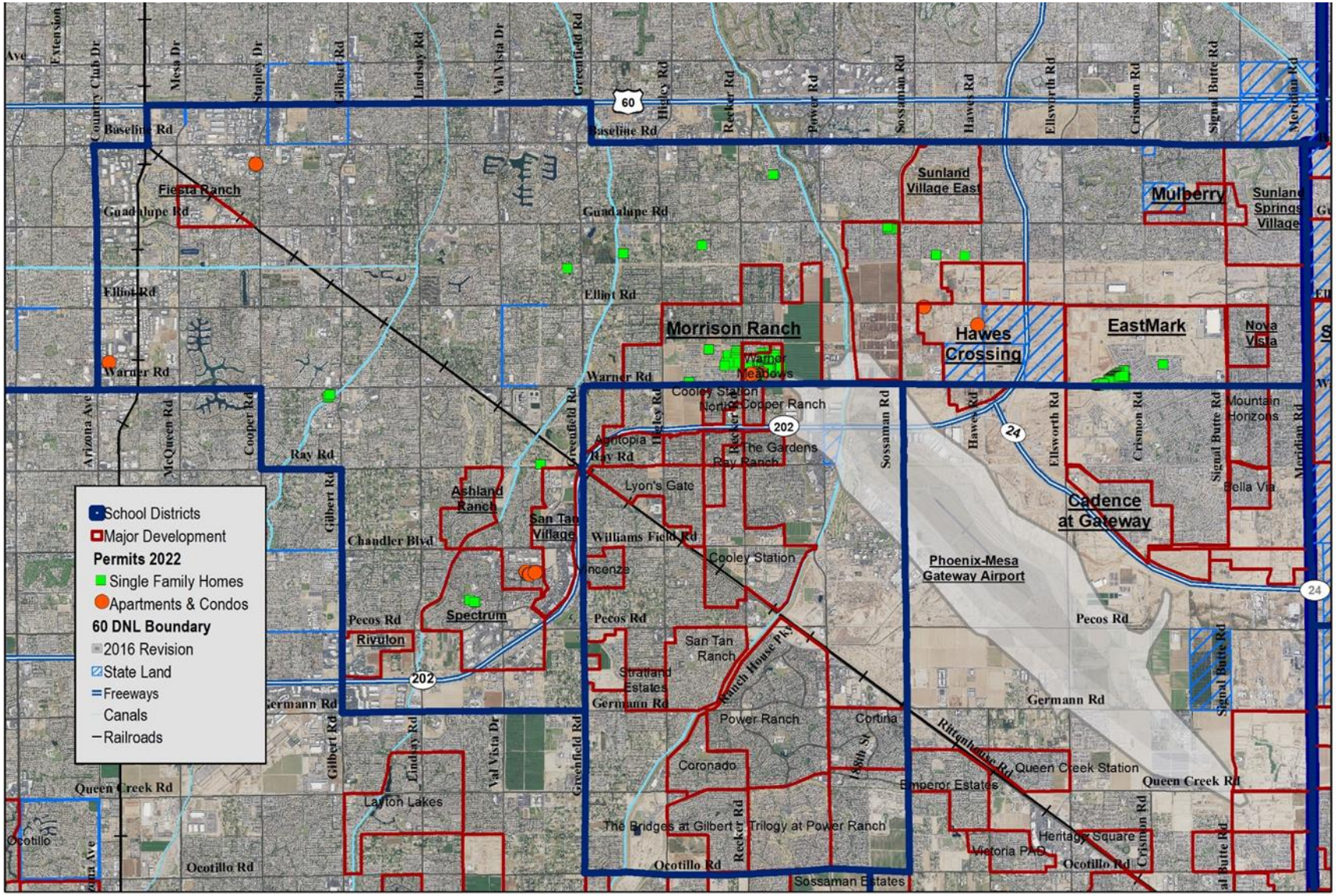
TABLE 13B
HOUSING PERMITS BY QUARTER

	2020					2021					2022				
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**	1	-	1	-	**2**
Single Family 2.01 - 3.5 du/ac	46	29	40	35	**150**	57	45	25	14	**141**	17	15	13	14	**59**
Single Family 3.51 - 4.5 du/ac	46	39	75	45	**205**	62	24	40	42	**168**	96	63	28	12	**199**
Single Family 4.51 - 6 du/ac	92	98	34	78	**302**	-	-	-	-	**-**	-	-	-	-	**-**
Single Family 6.01du/ac & Over	4	17	22	16	**59**	36	27	5	-	**68**	16	16	16	13	**61**
Single Family Attached	74	11	89	44	**218**	47	78	52	58	**235**	8	61	37	57	**163**
0	-	-	-	-	**-**	-	-	-	-	**-**	-	-	-	-	**-**
Total Single Family	262	194	260	226	**942**	208	178	122	119	**627**	138	155	95	96	**484**

Sources: Maricopa Association of Governments; Construction Monitor; Maricopa County Assessor; Applied Economics, 2023.

Map 6 shows development activity in the District in 2021/22 with markers for individual building permits. There are still clusters of activity at Eastmark and Morrison Ranch but both developments are nearing buildout. Additional development activity is scattered across most of the District. Multifamily projects can be found in many areas, particularly in close proximity to the major transportation corridors in the District.

MAP 6
RESIDENTIAL PERMITTING



3.3 Residential Development

3.3.1 Future Development Potential

Future housing supply in the District is detailed on **Table 14**, categorized by the type of housing and according to the general time period during which vertical construction is expected to begin. The timing categories indicate the start of construction for a project and are not related to the level or rate of construction, both of which can vary widely for diverse reasons. The Infill category includes rural parcels, single lots within existing neighborhoods, and small custom projects likely to be under intermittent development over time. The number of units, type, and timing estimates will frequently be adjusted as new information becomes available.

The diminishing amount of easily developable land is reflected by the high proportion of future multifamily development that is expected. As large parcels of land cease to be available, single family growth is being limited to small infill projects. Multifamily construction allows significant growth on smaller parcels, and redevelopment of commercial properties also favors new multifamily development. Nearly half of the current housing additions in the District are multifamily and the continuation of this trend is reflected in the projections.

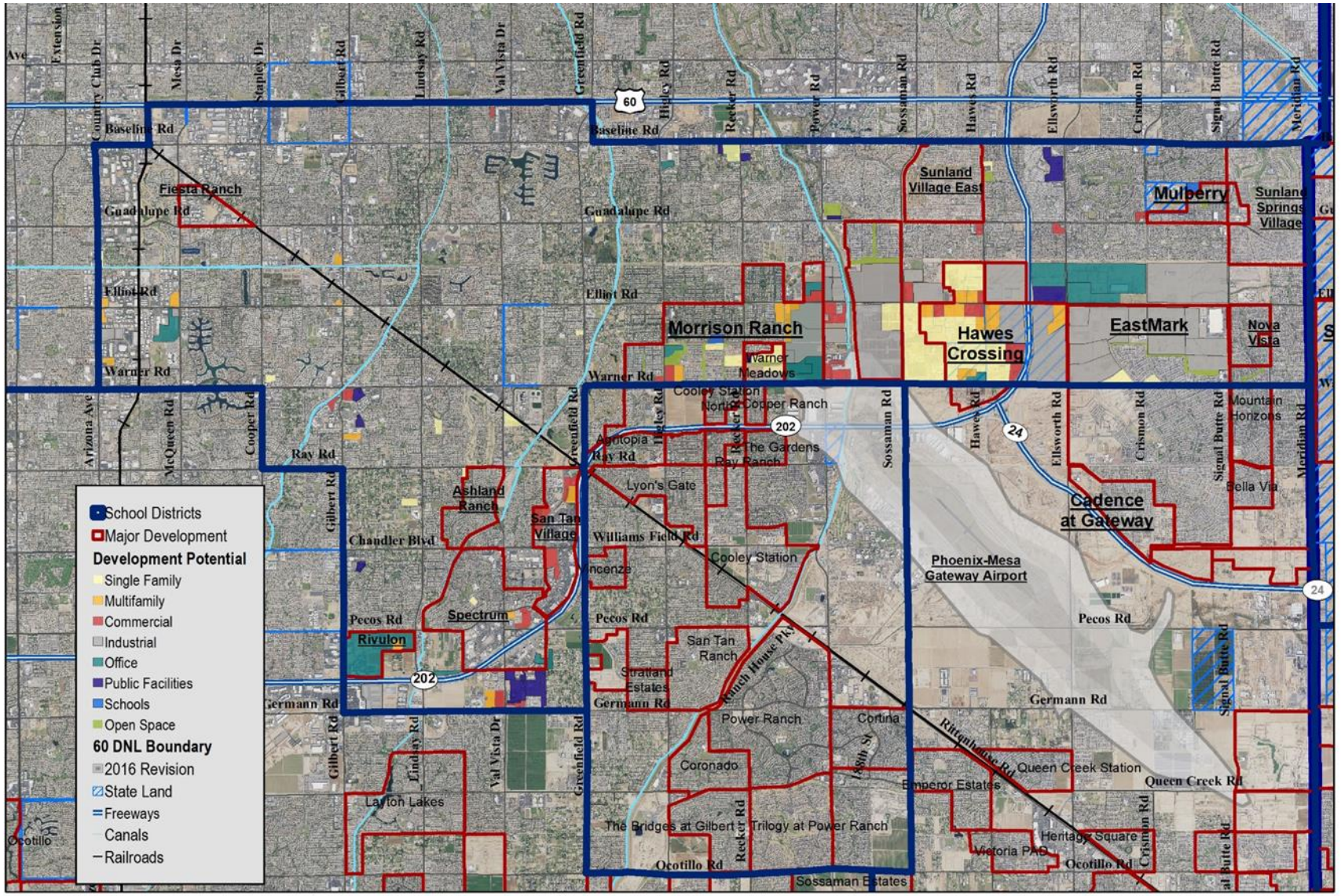
TABLE 14
POTENTIAL NEW HOUSING BY DEVELOPMENT TIMELINE

	Existing		Vacant Land				
Housing Type	Infill	Projects	1 Year	2-3 Years	3-5 Years	5-10 Years	Total
Family Housing							
Single Family 2 du/ac or less	1	1	10	-	31	236	279
Single Family 2.01 - 3.5 du/ac	-	52	-	23	180	-	255
Single Family 3.51 - 4.5 du/ac	789	64	18	140	80	-	1,091
Single Family 4.51 - 6 du/ac	-	-	-	761	1,140	-	1,901
Single Family 6.01du/ac & Over	-	12	21	-	-	280	313
Single Family Attached	-	-	-	161	130	-	291
Total Single Family	790	129	49	1,085	1,561	516	4,130
Condominium/Townhouse	92	-	-	-	-	410	502
Rental SF/BTR	-	-	-	102	222	395	719
Standard Courtyard Apts	-	-	-	352	380	1,450	2,182
Urban/Lifestyle Apts	-	-	1,031	1,235	1,631	2,618	6,515
Total Multifamily	92	-	1,031	1,689	2,233	4,873	9,918
Total	882	129	1,080	2,774	3,794	5,389	14,048

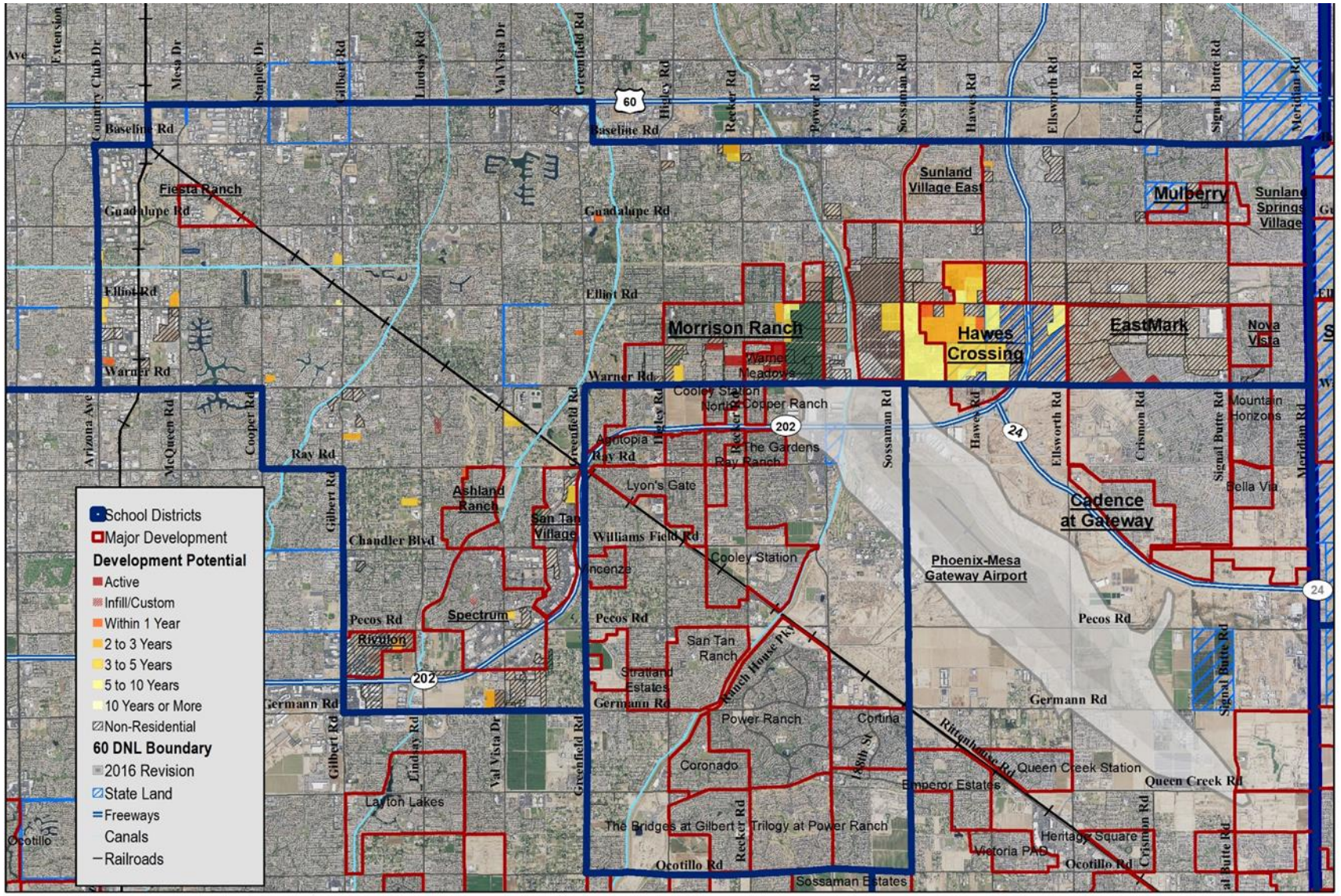
Sources: City of Gilbert, City of Mesa; Applied Economics, 2023.

Future land use and development timing is illustrated in the following maps (**Maps 7 and 8**). There are few areas with large amounts of vacant land remaining for development and the Hawes Crossing area is the only one proposed for residential uses. The Elliot Road corridor and remaining land at Eastmark are both planned for industrial or business park development; aside from one multifamily project, land in Rivulon is planned for office use. Land in the Warner and Power Road area is impacted by the Phoenix-Mesa Gateway Airport and will also have industrial or business park development.

MAP 7
FUTURE LAND USE



MAP 8
DEVELOPMENT TIMING



Diversity in housing lends stability to the market since economic changes don't affect all types in the same way. A variety also provides for differing household structures and ages due to the range of housing prices. In general, smaller and less costly housing tends to attract younger householders with young children, while the "move-up" market refers to higher priced houses that are typically purchased by somewhat older householders. "Executive" housing is at the upper level of pricing with generally older buyers that have children in the upper grades, or "empty nesters" without children in the household. A balanced market will have all of these types of housing and age groups. This allows first-time buyers to become established and build equity to purchase larger homes in the same area. Without these choices families may not remain within a community.

Regional MLS data shows the April 2023 median sales price for a three-bedroom, single family house at $420,000 and the median for any size house at $455,400. **Table 15** shows pricing at various subdivisions around the District and one, Radiance at Superstition Vistas, just east of the District. Although this list is not comprehensive, it is indicative of the characteristics of the housing market in the District and the range of pricing that is available. The District is generally a "move-up" market, although there are some options for entry-level buyers. This creates a generally favorable market for families who can move into an area and also move up in the housing market as they become more established.

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
D. R. Horton	Radiance at Superstition Vistas	15	1,330	3	$ 362,990	1,977	5	$ 477,990
Lennar Homes	Warner Meadows	18	1,312	3	$ 398,990	2,612	4	$ 695,990
Toll Brothers	Morrison Ranch: Lakeview Trails	3	2,955	3	$1,281,995	3,579	4	$1,674,995
Tri Pointe Homes	Annecy: Towns Townhouses	3	1,194	2	$ 379,300	1,921	3	$ 459,900
William Ryan Homes	Eastmark: Wavelength	4	1,901	3	$ 595,900	2,199	4	$ 647,900
Woodside Homes	Eastmark: Enchantment	6	1,622	2	$ 490,990	3,336	4	$ 682,990

Source: Builder websites; Applied Economics, May 10-17, 2023.

3.3.2 Development Projects

Peak housing production in the District was reached in the 1990's with the advent of multiple developments on the large tracts of agricultural land that was opened for development. Production levels reached over 4,000 units per year, nearly all of which were single family. These high volumes gave way to slower growth by the early 2000's, even before the recessionary period began in 2007. Production accelerated again in 2014 with the opening of multiple subdivisions at Morrison Ranch, and this was quickly followed by development at Mulberry and then Eastmark. These three master planned communities, and a number of smaller subdivisions, have generated the bulk of housing growth in the District over the past decade. Mulberry was built-out in 2020 and Eastmark and Morrison Ranch are being completed now (except for two multifamily parcels). Although Warner Meadows has been very active since opening in late 2021 and Hawes Crossing is starting to emerge, these are the only major developments remaining to be built due to the diminished supply of vacant parcels in the District.

Substantial single family housing production is expected to continue through the first half of the projection period, although not at levels equal to past yields. By the end of the projection period, single family construction is forecast to rapidly diminish. By contrast, the prognosis for multifamily development is continued growth with strong levels of activity throughout the projection.

Eastmark (north of Warner Road): Woodside Homes, Capital West, William Ryan Homes; Crismon and Warner Roads; 940 estimated total lots – 20 remaining.

This 3,200-acre master plan opened in 2013, starting with subdivisions south of the District's boundary. Eastmark has been one of the best-selling master plans in the country, with over 6,000 houses built in the past decade, including those outside the District. One reason for this success is that the developers, Brookfield Residential and DMB, constantly reevaluated plans which resulted in evolving land uses. A master planned community in every sense of the term, Eastmark has single family and multifamily residential, retail, and a major employment node.

The section located within the District along Elliot Road has long been designated for employment uses, but it remains largely vacant except for a data center built in 2012. The land north of the Warner Road alignment had been planned to be divided between residential and industrial uses but the region's burgeoning technology sector has altered those plans. At this time Meta (Facebook) is constructing a major data center on 380 acres of land at Ellsworth and Elliot Roads (right), and other industry users acquired most of the remaining vacant land in purchases made during 2021 and 2022.

As a result, new housing construction will be limited to completion of the subdivisions that are already active and the last few lots should be completed in the next few months. The subdivisions south of the District are expected to be finished within the next two years, completing the development of this master planned community.

Warner Meadows: Lennar Homes; Warner and Recker Roads; 460 estimated total lots – 110 remaining.

New housing construction began in fall 2021 on the first two of five product lines in this community. Half of this project consists of small-lot houses and the remainder are conventional suburban lots. The numerous housing options, wide range of pricing, and enhanced community amenities suggest that families with children will be the primary target residents. (right)

All five product lines are under construction and production rates are high. Occupancies should be underway during the summer of 2023 and starting to impact the District at the beginning of the 2023/24 school year. Housing starts are forecast to continue through 2023, with the completion of construction of the development in mid-to late-2024.

Hawes Crossing: Lennar Homes, Taylor Morrison Homes; Elliot and Hawes Roads; 2,200 estimated total single family lots; over 2,000 multifamily units.

The last large master plan in the District was approved in 2020 and active site and infrastructure development is ongoing; housing starts are expected to commence by fall 2023 and the first closings should occur about mid-2024. Two apartment complexes totaling 600 units are also being advanced, with vertical construction expected by about mid-2023. Once active housing construction begins, production is expected to be strong through most of the projection period with both single family and multifamily projects adding nearly equal numbers of units.

The first phase of single family development will be in two sections (or Villages): Lennar is building north of Elliot Road on about 450 lots and Taylor Morrison (left) has about 580 lots south of Elliot. Early estimates are for good production rates at both locations. There will be at least 7 product lines between the two builders and overall production of around 300 houses per year or more is expected, although that may change with shifting market conditions. The first impacts on the District would be felt during the 2024/25 school year.

Given the location and the past examples of Eastmark and Morrison Ranch, it is expected that this project will be successful and housing production may increase well beyond early estimates. A sign of confidence in the project is indicated by the auction of State Trust land within the boundaries that is scheduled for June 28, 2023. This 115-acre parcel is zoned for several hundred potential residential lots and could start development by 2025 or 2026.

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

While this development is not within the District, the proximity to the District schools and distance from Apache Junction schools make it highly likely that it will have an impact on District enrollment. Five subdivisions with several hundred lots have already been platted and house construction is well underway (right). At this time D.R. Horton is actively building Radiance, which includes a range of housing options and targets families that have been priced out of some of the East Valley markets. As high-volume builders, this should be a good market fit. Brookfield is anticipated to open its Blossom Rock section in 2024 and may sell some lots to other builders, which would tend to increase overall production. While construction is active on phase one, the next phase is already being prepared, with new plats in process and infrastructure being extended, which indicates a high level of expected sales and production.

Other Projects

Multifamily construction already makes up over 40 percent of new housing in the District and as the amount of developable residential land continues to decline, the share of multifamily additions will increase. The multifamily market has evolved over the last several years to include traditional complexes, high-price luxury projects, and single family rental communities, sometimes referred to as "horizontal apartments" since they are generally small, single-story, detached units. Most new construction will be high-end projects and single family rentals, such as the 166-unit Bungalows on Ray, located at Ray Road and San Tan Parkway, that will be completed in 2023.

Elevated production of multifamily is expected over the next three to four years. In addition to the two projects at Hawes Crossing, groundwork has already begun on the first of two apartment complexes at Morrison Ranch, and a long-expected complex at Rivulon. Other projects located in the Arizona Avenue corridor, at the western border of the District and throughout the San Tan area, are advancing. High volumes are likely over the next few years as several projects move ahead, and strong production is expected to continue throughout the projection period.

4.0 District Projections

4.1 Population & Housing

Table 16 provides annual housing, household and population projections for the District through 2032/33 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 projection period is based on recent and forecast construction trends, land availability and ownership, and data reflecting local economic growth trends. The projections call for the addition of 12,200 housing units over the next ten years, a 15 percent increase over the nearly 82,200 units that currently make up the District's housing inventory. The vast majority (70 percent) of new units added during the projection period are expected to be multifamily. By 2032/33 the District's housing inventory is expected to total nearly 94,400 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**	**250**	**2.910**
2011/12	**185,671**	**69,658**	**352**	**352**	**0**	**91.6%**	**63,822**	**442**	**2.909**
2012/13	**187,585**	**70,341**	**683**	**408**	**275**	**91.8%**	**64,569**	**747**	**2.905**
2013/14	**188,884**	**70,771**	**430**	**323**	**107**	**92.0%**	**65,086**	**517**	**2.902**
2014/15	**191,405**	**71,869**	**1,098**	**432**	**666**	**92.1%**	**66,220**	**1,134**	**2.890**
2015/16	**194,334**	**72,968**	**1,099**	**709**	**390**	**92.3%**	**67,359**	**1,139**	**2.885**
2016/17	**198,033**	**74,364**	**1,396**	**873**	**523**	**92.5%**	**68,777**	**1,418**	**2.879**
2017/18	**201,548**	**75,853**	**1,489**	**903**	**586**	**92.7%**	**70,286**	**1,509**	**2.868**
2018/19	**204,324**	**76,784**	**931**	**772**	**159**	**92.8%**	**71,283**	**997**	**2.866**
2019/20	**207,382**	**77,861**	**1,077**	**780**	**297**	**93.0%**	**72,418**	**1,136**	**2.864**
2020/21	**211,394**	**79,324**	**1,463**	**905**	**558**	**93.2%**	**73,918**	**1,500**	**2.860**
2021/22	**213,694**	**81,036**	**1,712**	**1,022**	**840**	**92.7%**	**75,120**	**1,202**	**2.845**
2022/23	**215,813**	**82,175**	**1,139**	**534**	**605**	**92.5%**	**76,012**	**892**	**2.839**
2023/24	217,647	82,608	433	267	166	93.0%	76,825	814	2.833
2024/25	219,442	84,211	1,603	396	1,207	92.5%	77,895	1,070	2.817
2025/26	221,237	86,190	1,979	460	1,519	91.7%	79,036	1,141	2.799
2026/27	223,467	87,973	1,783	578	1,205	91.2%	80,231	1,195	2.785
2027/28	225,935	89,492	1,519	591	928	91.0%	81,438	1,206	2.774
2028/29	228,752	90,705	1,213	518	695	91.2%	82,723	1,285	2.765
2029/30	231,234	91,800	1,095	403	692	91.4%	83,905	1,182	2.756
2030/31	233,239	92,720	920	256	664	91.6%	84,932	1,026	2.746
2031/32	235,108	93,664	944	88	856	91.8%	85,984	1,052	2.734
2032/33	236,817	94,388	724	74	650	92.1%	86,931	948	2.724
2023/24 - 2032/33			12,213	3,631	8,582			10,919	

Source: Applied Economics, 2023.
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 both the occupancy rate and the population per household are expected to decline over the next ten years, due to the aging of the population and the influx of multifamily units, 10,900 new households are projected to yield a total District population of nearly 237,000 people by 2032/33, which represents an increase of 10 percent compared to 2022/23.

4.2 Enrollment

In addition to the volume and market orientation of household growth, trends in per-household student generation, the Enrollment-Population ratio and the Service Rate are key factors used in determining future enrollment. 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**, roughly 40,500 school-age persons currently reside in the District, implying an average generation rate of 0.532 school-age persons per household. This rate has fallen by 24 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 * Total	School-Age Population * Per HH	K-12 Enrollment	Difference	Enrollment - Pop. Ratio
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	58,424	40,628	0.695	36,582	4,046	0.900
2005/06	60,797	41,680	0.686	36,986	4,694	0.887
2006/07	61,662	41,966	0.681	37,170	4,796	0.886
2007/08	62,417	42,303	0.678	37,919	4,384	0.896
2008/09	63,021	42,395	0.673	38,061	4,334	0.898
2009/10	63,130	42,354	0.671	38,292	4,062	0.904
2010/11	63,380	42,250	0.667	37,977	4,273	0.899
2011/12	63,822	41,767	0.654	37,884	3,883	0.907
2012/13	64,569	41,483	0.642	37,599	3,884	0.906
2013/14	65,086	41,051	0.631	37,294	3,757	0.908
2014/15	66,220	41,003	0.619	36,529	4,474	0.891
2015/16	67,359	40,946	0.608	35,624	5,322	0.870
2016/17	68,777	41,044	0.597	35,022	6,022	0.853
2017/18	70,286	41,177	0.586	34,542	6,635	0.839
2018/19	71,283	40,998	0.575	34,352	6,646	0.838
2019/20	72,418	40,890	0.565	34,544	6,346	0.845
2020/21	73,918	40,974	0.554	33,149	7,825	0.809
2021/22	75,120	41,307	0.550	33,432	7,875	0.809
2022/23	76,012	40,458	0.532	33,017	7,441	0.816

Source: Applied Economics, 2023.
* Population age 5 through 17, corresponds with Kindergarten through 12th grade.

The second factor affecting enrollment projections is the ratio between the District's K-12 enrollment and the number of school-age persons living in the District, referred to herein as the Enrollment-Population (E-P) ratio. Due to the growing number of educational alternatives and open enrollment policies, the E-P ratio has become increasingly important when conducting enrollment projections. Assuming a school-age population of 40,458 and total enrollment of 33,017 students results in a difference of 7,441 students and a District E-P ratio of 0.816, or 81.6 percent in 2022/23. 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 13,300 in-District school-age persons to other providers and the gain of roughly 5,900 students at District schools from outside of the District.

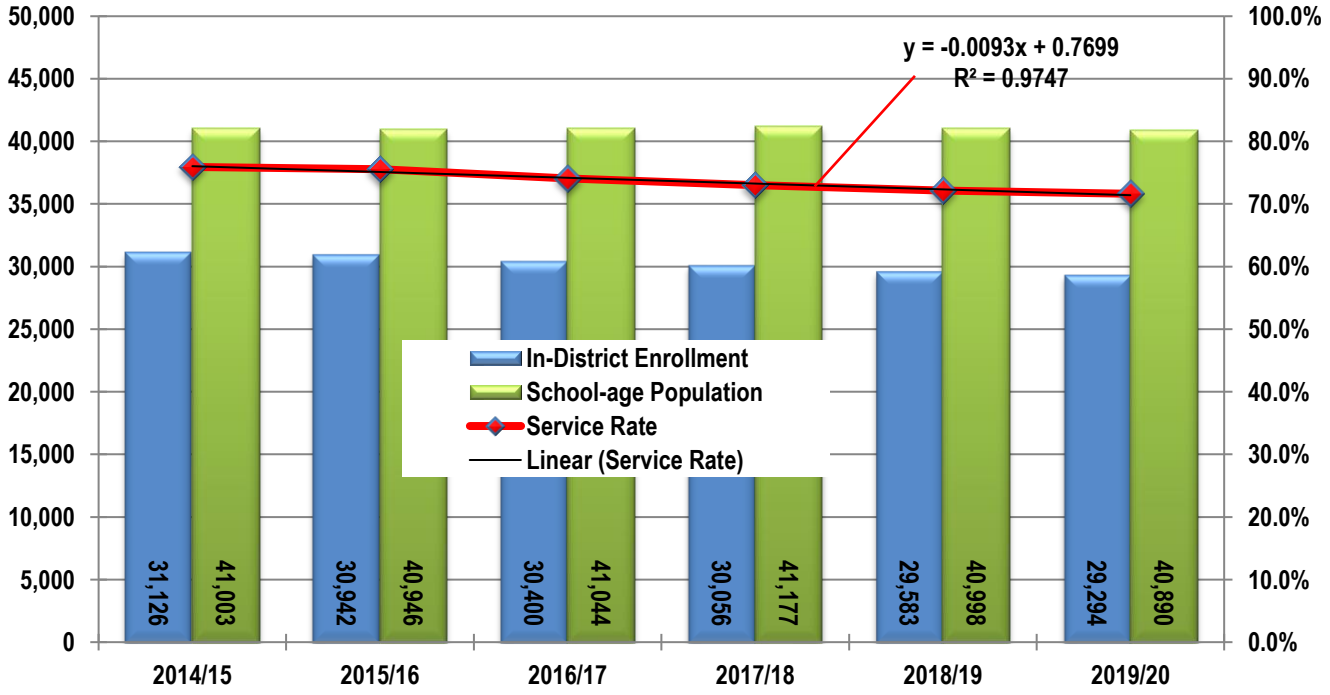
Enrollment ratios can also be used to assess how successful the District is in enrolling the school-age population that resides within the District; this is done by eliminating students that are enrolled but live outside of the District's boundaries from the total. Referred to as the "service rate", this ratio is based on the difference between the school-age population and *in-District enrollment*. In 2022/23, in-District enrollment totaled nearly 27,200 students, resulting in a difference of about 13,300 persons and a service rate of 67.1 percent, which is considerably lower than the E-P ratio (81.6 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 pandemic-induced decrease in 2020/21 (**Table 18**). Since 2014/15, the District's service rate has declined by an average of 1.5 percent per year, as shown in **Figures 7 and 8**.

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

	School-Age Population *		K-12	Enrollment -	Out of District		In-district K-12	In-district	Service
Year	Total	Per HH	Enrollment	Pop. Ratio	K-12	Share	Enrollment	Difference	Rate
2014/15	41,003	0.619	36,529	0.891	5,403	14.8%	31,126	9,877	75.9%
2015/16	40,946	0.608	35,624	0.870	4,682	13.1%	30,942	10,004	75.6%
2016/17	41,044	0.597	35,022	0.853	4,622	13.2%	30,400	10,644	74.1%
2017/18	41,177	0.586	34,542	0.839	4,486	13.0%	30,056	11,121	73.0%
2018/19	40,998	0.575	34,352	0.838	4,769	13.9%	29,583	11,415	72.2%
2019/20	40,890	0.565	34,544	0.845	5,250	15.2%	29,294	11,596	71.6%
2020/21	40,974	0.554	33,149	0.809	5,541	16.7%	27,608	13,366	67.4%
2021/22	41,307	0.550	33,432	0.809	5,640	16.9%	27,792	13,515	67.3%
2022/23	40,458	0.532	33,017	0.816	5,862	17.8%	27,155	13,303	67.1%

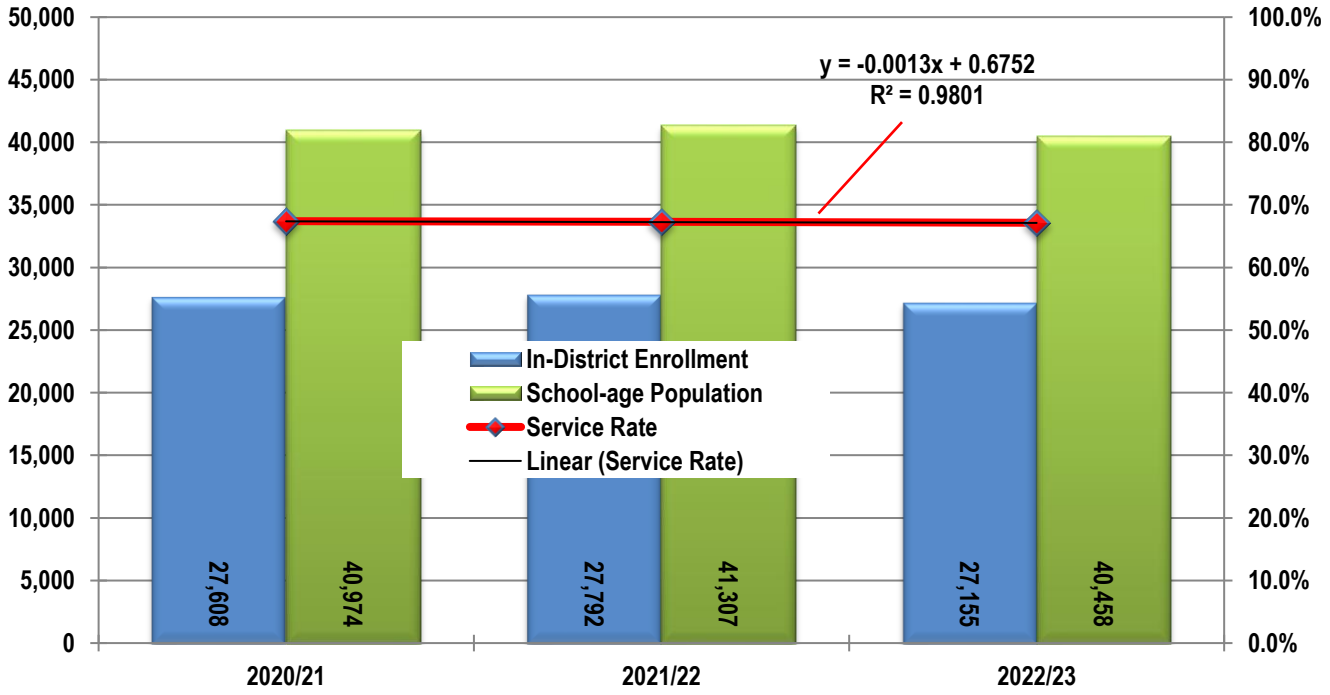
Source: Applied Economics, 2023.
* Population age 5 through 17, corresponds with Kindergarten through 12th grade.

FIGURE 7
PRE-PANDEMIC SERVICE RATE TRENDS



Sources: Gilbert Unified School District; Applied Economics.

FIGURE 8
POST-PANDEMIC SERVICE RATE TRENDS



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 "Trend" scenario assumes that the service rate declines at the rate it did between 2014/15 and 2019/20 (pre-pandemic), or about 0.93 percent per year. The "Stable" scenario assumed the service rate remains at about the current level it has been the last three years (post-pandemic), about 0.013 percent per year. Finally, the "Mid" scenario uses a service rate that reflects the mid-point between the Trend and Stable service rate scenarios.

Despite the projected addition of nearly 10,900 households by 2032/33, the school-age population per household is expected to decline slowly throughout the 10-year period. When the projected school-age population is combined with a falling service rate, each scenario projects a decline in in-District enrollment by 2032/33, although the rate of decline varies (**Table 19**).

TABLE 19
ALTERNATIVE SERVICE RATE IN-DISTRICT ENROLLMENT PROJECTION SCENARIOS

	Service Rate			In-District Enrollment			Enrollment Change		
Year	Trend*	Mid	Stable	Trend	Mid	Stable	Trend	Mid	Stable
2014/15	**75.9%**	**75.9%**	**75.9%**	**31,126**	**31,126**	**31,126**			
2015/16	**75.6%**	**75.6%**	**75.6%**	**30,942**	**30,942**	**30,942**	**-184**	**-184**	**-184**
2016/17	**74.1%**	**74.1%**	**74.1%**	**30,400**	**30,400**	**30,400**	**-542**	**-542**	**-542**
2017/18	**73.0%**	**73.0%**	**73.0%**	**30,056**	**30,056**	**30,056**	**-344**	**-344**	**-344**
2018/19	**72.2%**	**72.2%**	**72.2%**	**29,583**	**29,583**	**29,583**	**-473**	**-473**	**-473**
2019/20	**71.6%**	**71.6%**	**71.6%**	**29,294**	**29,294**	**29,294**	**-289**	**-289**	**-289**
2020/21	**67.4%**	**67.4%**	**67.4%**	**27,608**	**27,608**	**27,608**	**-1,686**	**-1,686**	**-1,686**
2021/22	**67.3%**	**67.3%**	**67.3%**	**27,792**	**27,792**	**27,792**	**184**	**184**	**184**
2022/23	**66.9%**	**66.9%**	**66.9%**	**27,155**	**27,155**	**27,155**	**-637**	**-637**	**-637**
2023/24	66.3%	66.7%	67.1%	26,706	26,870	27,035	-449	-285	-120
2024/25	65.2%	66.1%	66.9%	26,152	26,484	26,820	-553	-385	-214
2025/26	63.9%	65.1%	66.4%	25,528	26,021	26,524	-625	-464	-297
2026/27	63.0%	64.6%	66.3%	25,074	25,730	26,399	-454	-291	-125
2027/28	62.4%	64.4%	66.5%	24,759	25,577	26,414	-315	-153	15
2028/29	61.8%	64.3%	66.9%	24,486	25,468	26,472	-273	-109	58
2029/30	61.4%	64.3%	67.3%	24,219	25,353	26,529	-267	-115	57
2030/31	60.4%	63.6%	67.0%	23,670	24,950	26,284	-548	-402	-244
2031/32	59.3%	62.9%	66.7%	23,107	24,526	26,014	-564	-425	-271
2032/33	57.7%	62.1%	66.8%	22,332	24,048	25,865	-775	-478	-149
2023/24 - 2032/33							-4,823	-3,107	-1,290

Source: Applied Economics, 2023.
Bolding indicates actuals.
* Based on average rate of decline from 2014/15 through 2019/20.

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 using the Mid service rate scenario.

Table 20 provides a more detailed review of recent past and projected total enrollment changes based on the Mid service rate scenario and 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 and a slight increase in out-of-District enrollment, the District is expected to experience a loss of about 2,800 students by 2032/33 (8.5 percent), yielding total enrollment of roughly 30,200 K-12 students at the end of the projection period. Enrollment is expected to decline in each of the next 10 years, dropping by an average of 0.9 percent per year during the projection period.

TABLE 20
ENROLLMENT PROJECTIONS BY LEVEL: MID SERVICE RATE SCENARIO

	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	**15,818**	**5,124**	**20,942**	**12,075**	**33,017**	**-415**	**-1.2%**
2023/24	15,859	5,023	20,882	11,879	32,761	-256	-0.8%
2024/25	15,691	5,122	20,813	11,592	32,405	-356	-1.1%
2025/26	15,500	5,281	20,781	11,190	31,971	-434	-1.3%
2026/27	15,146	5,423	20,569	11,141	31,710	-261	-0.8%
2027/28	14,940	5,414	20,354	11,233	31,587	-123	-0.4%
2028/29	14,606	5,369	19,975	11,533	31,508	-79	-0.3%
2029/30	14,374	5,338	19,712	11,711	31,423	-85	-0.3%
2030/31	14,145	5,114	19,259	11,792	31,051	-372	-1.2%
2031/32	13,942	5,002	18,944	11,713	30,657	-394	-1.3%
2032/33	13,838	4,921	18,759	11,451	30,210	-447	-1.5%

Source: Applied Economics, 2023.
Bolding indicates actuals.

The vast majority of the 10-year decline (71 percent) is driven by the loss of roughly 2,000 K-6 students, which represents an enrollment decline of 12.5 percent compared to 2022/23. Net enrollment losses in 7-8 and 9-12 enrollment are also projected by 2032/33, although unlike the K-6 cohort some annual upward fluctuations are expected during the 10-year period.

By 2032/33, 7-8 enrollment is projected to total roughly 4,900 students, down four percent (200 students) compared to 2022/23. Some annual 7-8 enrollment increases are expected during the first half of the projection period; however, these gains are completely offset by annual losses during the second five-year period.

In the coming years, enrollment in the 9-12 cohort will be less affected by new housing additions as any increases that might have been expected are 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 by an average of 0.5 percent per year during the projection period, dropping to nearly 11,500 students by 2032/33; this represents an enrollment decline of five percent (600 students) compared to 2022/23.

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 2032/33 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

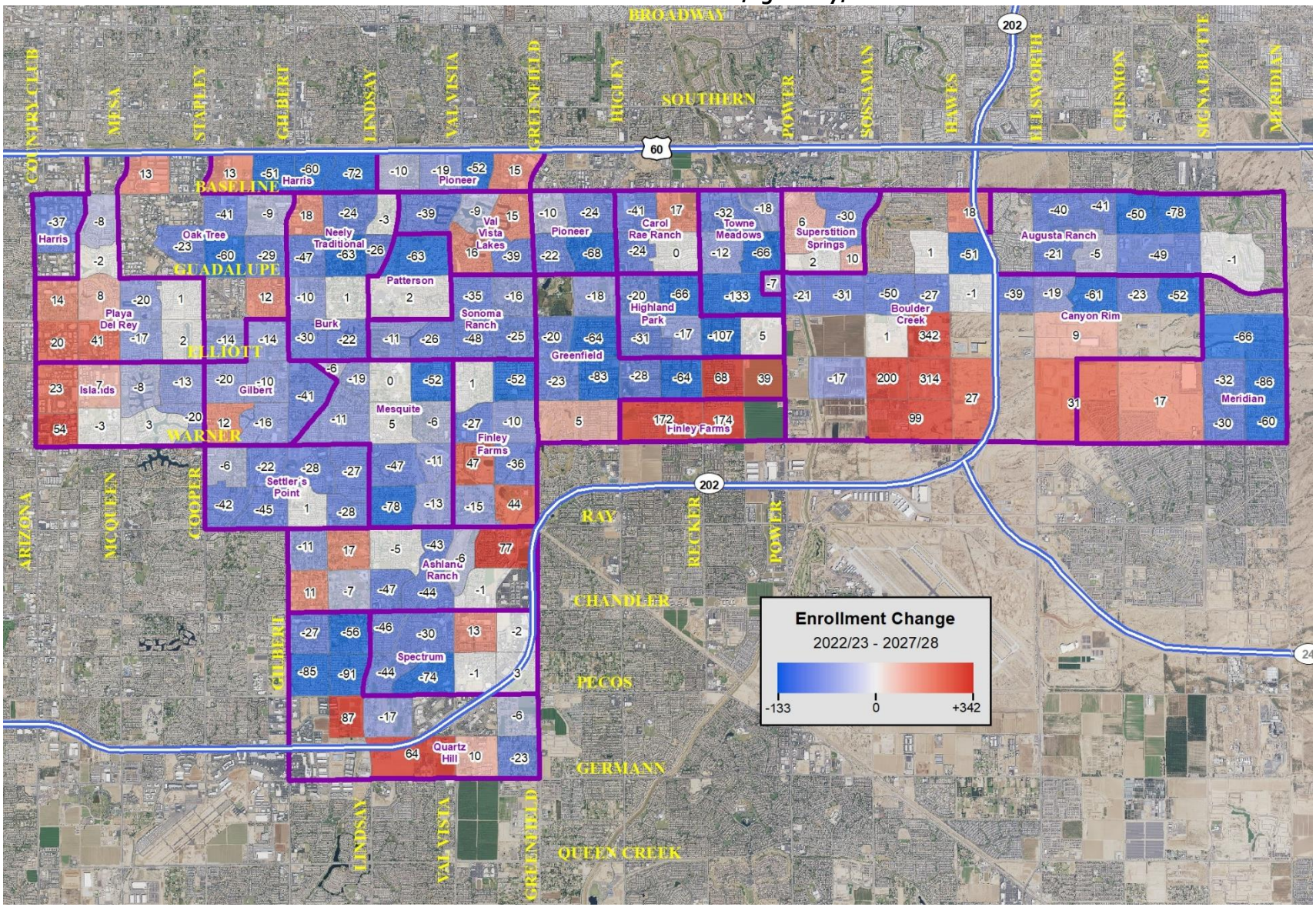
The projected changes in the number of students by grid over the next two five-year periods are depicted on **Maps 9 and 10**. The planning grids are color coded according to the degree of change, with increasing saturations of red for positive change and blue for negative change.

During the first five years of the projection period, strong enrollment growth is concentrated in several areas adjacent to Warner Road in the central and eastern portions of the District; moderate growth can also be seen along Arizona Avenue in the west and in a few pockets in the southern portion of the District where new development is occurring. 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. As new single family housing construction slows during the second five-year period, enrollment increases diminish and become even more concentrated in the eastern portion of the District.

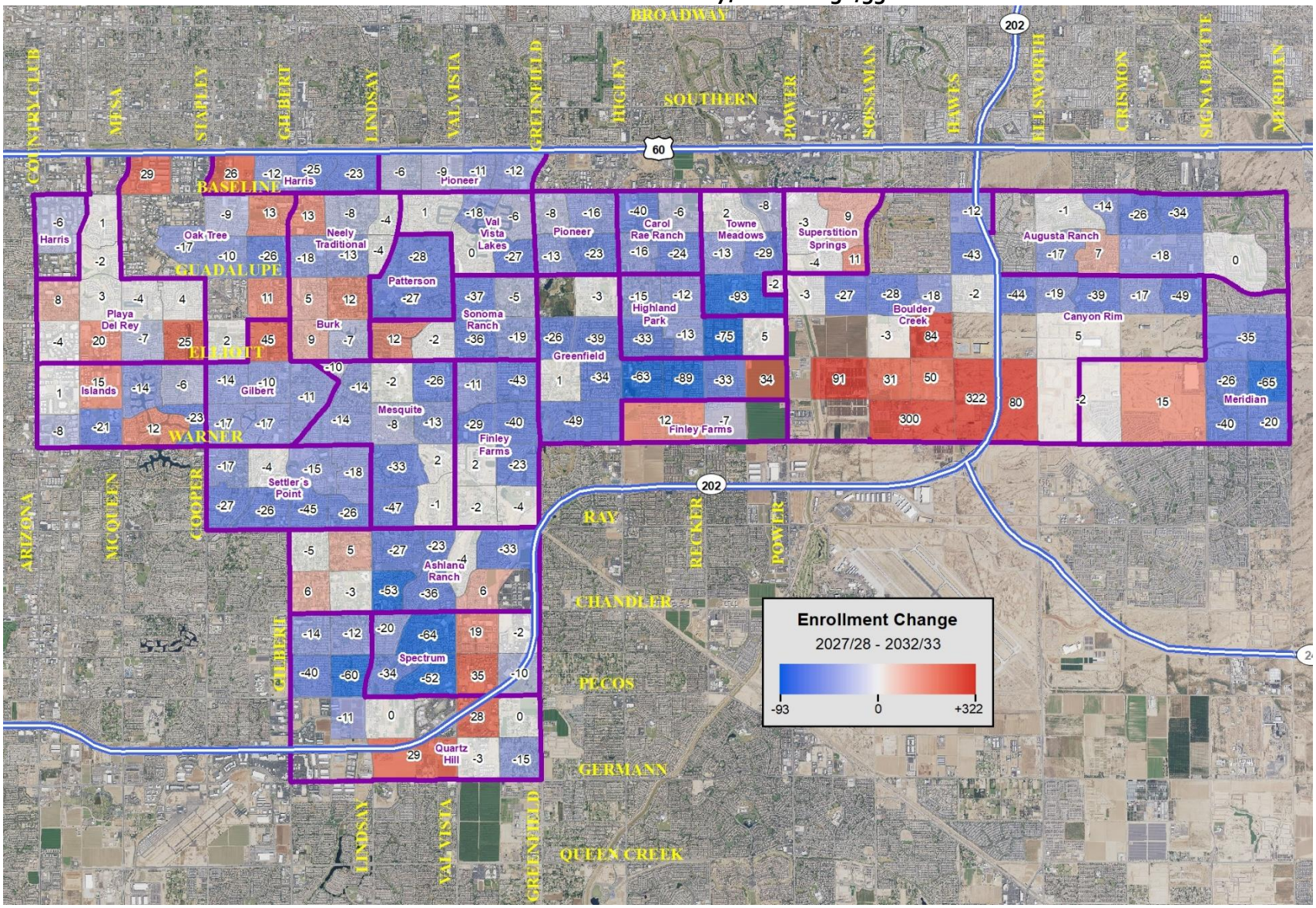
5.2 Attendance Area Projections

Table 21 shows historical elementary enrollment by attendance area, as well as projections through 2032/33 based on the Mid service rate 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.

MAP 9
ENROLLMENT CHANGE: 2022/23 - 2027/28



MAP 10
ENROLLMENT CHANGE: 2027/2028 - 2032/33



As previously discussed, in-District elementary enrollment has been declining, the effects of which have been offset somewhat by recent increases in out-of-District enrollment. This trend, however, is not expected to continue during the first half of the projection period as a nominal decline in out-of-District enrollment is projected, resulting in an overall decline in elementary enrollment of 900 students by the end of the first five-year period. During the second half of the projection period, continued losses in both in-District and out-of-District students result in a net loss of another 1,100 K-6 students between 2027/28 and 2032/33. As a result, total elementary enrollment in 2032/33 is expected to total roughly 13,800 K-6 students, versus 15,800 K-6 students in 2022/23.

During the first half of the projection period, 21 of the 26 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 860 in-District K-6 students for the period. The largest enrollment gain is projected in the Boulder Creek (+400 students) attendance area and the largest losses are expected in the Canyon Rim and Greenfield attendance areas (-200 students each). In addition, out-of-District enrollment is expected to decline slightly by 2027/28. During the second half of the projection period, only the Boulder Creek attendance area is projected to see enrollment increase (+300 students); enrollment losses are expected in all of the remaining elementary attendance areas, resulting in a net loss of an additional 880 in-District K-6 students during the second five-year period. Out-of-District enrollment is also projected to decrease during the second half of the projection period, declining by about 200 students between 2027/28 and 2032/33.

Ten-year enrollment projections for the junior and high school attendance areas are shown on **Table 22**. District 7-8 attendance area enrollment is expected to increase during the first five-year period (+300 students) and decline during the second five-year period (-500 students), resulting in the net loss of 200 students 7-8 over the next ten years. This enrollment decline is driven entirely by a decrease in in-District enrollment (-250 students), which is slightly offset by a net gain of roughly 50 out-of-District students during the same period. Enrollment declines over the 10-year period are expected in the Greenfield (-170 students), Highland (-110 students) and South Valley (-140 students) by 2032/33. Desert Ridge is the only 7-8 attendance area projected to experience an enrollment increase of any significance over the next 10 years (+160 students).

Significant enrollment declines are projected at the high school level due to the loss of nearly 1,100 in-District 9-12 students over the next 10 years. Only the Desert Ridge attendance area is projected to experience an enrollment increase (+260 students) by 2032/33; losses in the remaining attendance areas range from 200 students (Mesquite) to 400 students (Gilbert). These losses are partially offset by a 500-student increase in out-of-District enrollment, most of which is expected to occur during the second half of the projection period.

TABLE 21
ELEMENTARY ENROLLMENT PROJECTIONS BY ATTENDANCE AREA
MID SERVICE RATE PROJECTIONS

	Actual												2017-2022	2022-2027	2027-2032
	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	...2032/33			
Ashland Ranch	674	647	672	645	631	666	648	627	593	577	570	487	-8	-96	-83
Augusta Ranch	865	821	830	817	806	792	798	788	763	736	728	655	-73	-64	-73
Boulder Creek	709	732	724	699	727	698	710	815	929	1,034	1,135	1,472	-11	437	337
Burk	319	312	313	278	601	559	575	581	571	563	550	509	240	-9	-41
Canyon Rim	772	705	670	618	689	688	679	589	562	534	505	469	-84	-183	-37
Carol Rae Ranch	449	440	426	383	396	399	391	374	366	361	354	317	-50	-45	-37
Finley Farms	603	624	598	585	670	721	804	817	797	794	787	652	118	66	-136
Gilbert	411	410	422	394	401	360	359	354	357	342	332	320	-51	-28	-12
Greenfield	915	948	1,001	917	920	879	865	822	783	729	699	608	-36	-180	-92
Harris	497	467	459	386	387	356	352	342	327	308	300	284	-141	-56	-16
Highland Park	701	674	635	526	538	504	488	462	449	436	414	363	-197	-90	-51
Houston	331	328	323	301	0	0	0	0	0	0	0	0	-331	0	0
Islands	416	436	446	382	354	355	341	372	355	358	344	319	-61	-11	-25
Meridian	713	655	615	552	563	568	549	590	575	555	528	437	-145	-40	-91
Mesquite	726	711	745	702	690	681	671	648	621	594	569	476	-45	-112	-93
Oak Tree	595	595	568	543	554	545	547	545	545	524	534	510	-50	-11	-24
Patterson	364	346	342	322	334	334	322	302	290	287	277	255	-30	-57	-22
Pioneer	452	494	493	423	385	376	362	347	335	326	317	284	-76	-59	-33
Playa Del Rey	427	422	411	370	410	408	432	441	472	492	498	461	-19	90	-36
Quartz Hill	368	347	317	281	277	296	284	277	291	269	250	233	-72	-46	-17
Settler´s Point	590	640	618	551	579	565	561	536	527	478	454	352	-25	-111	-102
Sonoma Ranch	446	441	434	407	444	402	406	393	377	360	350	300	-44	-52	-50
Spectrum	632	595	598	521	532	547	533	509	495	478	454	399	-85	-93	-56
Superstition Springs	510	501	522	487	528	503	514	513	516	526	524	485	-7	21	-39
Towne Meadows	599	555	543	494	526	509	490	461	443	418	417	381	-90	-92	-37
Val Vista Lakes	414	389	395	376	382	386	392	379	371	361	345	327	-28	-41	-18
Out of District	2,083	2,233	2,410	2,547	2,577	2,721	2,783	2,806	2,789	2,707	2,701	2,482	638	-20	-219
Total	16,581	16,468	16,530	15,507	15,901	15,818	15,859	15,690	15,499	15,145	14,939	13,838	-763	-879	-1,101

Source: Applied Economics, 2023.

TABLE 22
SECONDARY ENROLLMENT PROJECTIONS BY ATTENDANCE AREA
MID SERVICE RATE PROJECTIONS

	Actual												2017-2022	2022-2027	2027-2032
	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	...2032/33			
JUNIOR HIGH															
Desert Ridge Junior High	1,061	1,036	968	907	908	847	835	873	909	976	1,020	1,009	-214	173	-11
Greenfield Junior High	956	941	1,013	936	984	1,014	997	998	1,032	1,034	1,008	845	58	-6	-163
Highland Junior High	926	950	1,006	959	846	808	809	829	816	776	754	697	-118	-54	-57
Mesquite Junior High	1,288	1,316	1,263	1,199	1,137	1,030	1,036	1,045	1,061	1,125	1,155	1,034	-258	125	-121
South Valley Junior High	751	732	735	677	665	628	610	625	636	624	581	491	-123	-47	-90
Out of District	675	698	746	801	801	797	736	751	827	887	896	845	122	99	-52
Total	5,657	5,673	5,731	5,479	5,341	5,124	5,023	5,122	5,281	5,423	5,414	4,921	-533	290	-493
HIGH SCHOOL															
Campo Verde High	1,569	1,531	1,546	1,490	1,488	1,455	1,428	1,390	1,322	1,299	1,282	1,101	-114	-173	-182
Desert Ridge High	2,261	2,244	2,144	2,078	2,042	1,917	1,889	1,882	1,876	1,903	1,962	2,174	-344	45	212
Gilbert High	2,324	2,230	2,175	2,107	2,140	2,091	2,053	1,940	1,837	1,808	1,778	1,665	-233	-313	-113
Highland High	2,573	2,601	2,655	2,677	2,648	2,652	2,650	2,599	2,471	2,457	2,474	2,265	79	-178	-209
Mesquite High	1,849	1,767	1,669	1,619	1,610	1,616	1,487	1,417	1,350	1,290	1,324	1,410	-233	-292	87
Out of District	1,728	1,838	2,094	2,192	2,262	2,344	2,372	2,364	2,334	2,385	2,413	2,835	616	69	422
Total	12,304	12,211	12,283	12,163	12,190	12,075	11,879	11,592	11,190	11,141	11,233	11,451	-229	-842	218

Source: Applied Economics, 2023.

5.3 Attendance Area Versus School Enrollment

The variations between enrollment by attendance area and enrollment by school are detailed in **Tables 23 and 24**. 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 23**) there are 557 students attending Ashland Ranch who reside in the Ashland Ranch attendance area, 1 is from the Canyon Rim attendance area, 12 from the Finley Farms attendance area, 9 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 23 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 13,097 resident students attending District elementary schools this year, 71.4 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); at less than 50 percent, four schools had the lowest attend-reside ratios (Boulder Creek, Burk, Gilbert and Oak Tree). Of the schools with a designated attendance area, Highland Park has the largest net import of students (296 students). The school with the largest export of K-6 students is Boulder Creek with a net loss of 263 students, despite the addition of 49 out-of-District students. This year, 145 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 (141 students) despite the addition of 60 out-of-District K-6 students; in 2022/23, 120 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 (213 students).

The movement of District middle and high school students between area of residence and school of attendance is summarized in **Table 24**. At the middle school level, 81.3 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 (224 students) and enrolled the largest share of resident students (90.4 percent). Of Mesquite Junior High's 1,030 resident students, only 64.3 percent choose to attend the school, although a portion of this loss was offset by the enrollment of 110 out-of-District students; Mesquite Junior High was also the only middle school that had a net export of students this year (218 students). Desert Ridge enrolled the largest number of out-of-District students among the junior high schools (214 students).

Of the District's 9,731 resident high school students, 78.7 percent attended the school associated with their attendance area. Campo Verde High School had the largest net enrollment gain (540 students) among the high schools with defined attendance areas, due largely to the addition of 435 out-of-District students. Mesquite had a net enrollment loss of 221 students this year, despite enrolling 297 out-of-District students. Desert Ridge High School had a net enrollment gain this year of 326 students, but that gain was due entirely to the addition of 577 out-of-District students that chose to attend the school.

In total, the District enrolled 5,862 K-12 students from outside of the District's boundaries this year, which represents 17.8 percent of the District's total 2022/23 enrollment. Across all of the grade levels, 75.6 percent of resident students chose to attend the school associated with their attendance area of residence in 2022/23, which is less than the 2019/20 (pre-pandemic) ratio of 78.8 percent.

TABLE 23
SCHOOL VERSUS ATTENDANCE AREA ENROLLMENT (K-6th GRADE): 2022/23

School		Attendance Area 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	557				1		12	9	3	1		10		29	2	2			14	24	1	16		2	2	111	796	666	130
Augusta Ranch	2		649	27		34						1		14			3					1		5	1		181	916	792	124
Boulder Creek	3		10	335		25	1							5	2			1						6	1		49	435	698	-263
Burk	4	4		1	269	2		5	14		23	1	2		7	23	6		9	2	7	2		1	1	4	82	465	559	-94
Canyon Rim	5		74	42	1	525	4					2		19		2	1						4	7			129	810	688	122
Carol Rae Ranch	6	2	4	17	3	2	331	3		10	4	15		2		2		17	1			2	3	10	43		80	551	399	152
Finley Farms	7	5		3	3	1	1	480	4	20	2	4			19				1	1	9	5	7			3	58	626	721	-95
Gilbert	8	7		1	34	2	2	17	174	5	14	3	9	1	29	37	5	6	23	1	18	4	2		1	3	161	559	360	199
Greenfield	9	2		10	2		5	81	7	697	2	10	4	3	11	1	2	6		3		11			6	5	79	947	879	68
Harris	10	3		1	9	1			3		214		4		1	9		8	3					1		2	106	365	356	9
Highland Park	11	4	3	41	2	6	9	39	2	76		421		4	2	1	1	17			3	5	1	9	24	5	125	800	504	296
Islands	12				4		1	1	16		11		271		3	8			9	2	16	1	4	1		2	164	514	355	159
Meridian	13		16	13		56				4				499			1	1				1					149	740	568	172
Mesquite	14	5	2		7		3	5	10	8	2	1	2	2	427	7	1	1	1	5	5	9	12	1	3	7	65	591	681	-90
Oak Tree	15		1	1	10	4		2	14		12		3		3	267	5	3	5		6	3	3			2	60	404	545	-141
Patterson	16	4	1	10	58	1	2	6	13	4	6	3	1	1	11	28	240	11	5	2	5	28	7	4	6	13	74	544	334	210
Pioneer	17	4	2	2	1		3	3		2	4			5	4		1	252		3	4	7	4	3	1	8	91	404	376	28
Playa Del Rey	18	6			5				10		12	1	15		1	13	2		284		6						74	429	408	21
Quartz Hill	19	17	3	4				2	2	4		2	1		9	1				239	2	1	40		2	1	213	543	296	247
Settler's Point	20	7	2		9		2	3	18		2		5		34	5	2	2	2	2	405	2	2	2	1	3	45	555	565	-10
Sonoma Ranch	21	2		1	10	1	1	13		1	5		3	1	17	3	19	4			6	290	1	4	5	11	62	460	402	58
Spectrum	22	12	2		1			3			2		1		13	4			1	9	10	3	425			6	62	554	547	7
Superstition Springs	23		5	145	3	10	2		1	1	2	7		2	1		1					1		428	22		135	766	503	263
Towne Meadows	24	5	15	24	3	11	19	8		18	1	14		3	1	3	2	8		2	1	1		14	375	2	122	652	509	143
Val Vista Lakes	25		1	3	15		2	9	4	5	4	1			6	3	29	19			4	9	2	1	2	291	69	479	386	93
Neely Traditional		18		9	103	4	10	28	57	17	29	16	20		46	120	11	16	61	10	29	10	7	6	8	15	156	806	0	806
Gilbert Global Academy		2	1	5	5	2	1	1	1	3	4	1	3	5	3	5		2			4	4	4		3	1	16	76	0	76
Other			1	3	2				1	1		1	1	2	2	1		2	3	1	1	1	3		2		3	31		
Total Reside		666	792	698	559	688	399	721	360	879	356	504	355	568	681	545	334	376	408	296	565	402	547	503	509	386	2,721	15,818	13,097	2,721
Reside/Atttend Same		84%	82%	48%	48%	76%	83%	67%	48%	79%	60%	84%	76%	88%	63%	49%	72%	67%	70%	81%	72%	72%	78%	85%	74%	75%			9,345	71.4%

Sources: Gilbert Public Schools; Applied Economics, 2023.

TABLE 24
SCHOOL VERSUS ATTENDANCE AREA ENROLLMENT (7th-12th GRADE): 2022/23

MIDDLE SCHOOL

		Attendance Area								
School		1	2	3	4	5	Out of District	Total Attendance	Total Reside	Net Difference
Desert Ridge Junior High School	1	741	6	8	1		214	970	847	123
Greenfield Junior High School	2	6	850	68	133	17	129	1,203	1,014	189
Highland Junior High School	3	66	58	696	14	8	136	978	808	170
Mesquite Junior High School	4	1	23	4	662	12	110	812	1,030	-218
South Valley Junior High School	5	2	26	4	99	568	153	852	628	224
Gilbert Classical Academy		19	35	15	86	15	38	208	0	208
Gilbert Global Academy		4	5	6	10	3	8	36	0	36
Gilbert High School			8	3	18	2	2	33	0	33
Canyon Valley Junior High		6	2	3	3		4	18	0	18
Other		2	1	1	4	3	3	14	0	14
Total Reside		847	1,014	808	1,030	628	797	5,124	4,327	797
Reside/Atttend Same (In-District)		87.5%	83.8%	86.1%	64.3%	90.4%		3,517	81.3%	

HIGH SCHOOL

		Attendance Area								
School		1	2	3	4	5	Out of District	Total Attendance	Total Reside	Net Difference
Campo Verde High School	1	1,253	4	54	26	223	435	1,995	1,455	540
Desert Ridge High School	2	1	1,627	5	33		577	2,243	1,917	326
Gilbert High School	3	73	21	1,517	119	205	342	2,277	2,091	186
Highland High School	4	21	150	263	2,265	31	420	3,150	2,652	498
Mesquite High School	5	20	4	68	14	992	297	1,395	1,616	-221
Gilbert Classical Academy		36	12	71	69	79	124	391	0	391
Gilbert Global Academy		23	27	44	35	34	81	244	0	244
Canyon Valley High School		20	61	56	83	48	66	334	0	334
Other		8	11	13	8	4	2	46	0	46
Total Reside		1,455	1,917	2,091	2,652	1,616	2,344	12,075	9,731	2,344
Reside/Atttend Same (In-District)		86.1%	84.9%	72.5%	85.4%	61.4%		7,654	78.7%	

In-District Students (K-12)	Reside/Atttend Same (In-District)		20,516	75.6%

Sources: Gilbert Public Schools, 2022; Applied Economics, 2023.

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 and are shown in **Tables 25 and 26**; accordingly, these projections of enrollment by school reflect the same pattern of change as the attendance areas. 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.

TABLE 25
ELEMENTARY ENROLLMENT BY SCHOOL

	Actual												2017-2022	2022-2027	2027-2032
	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	...2032/33			
ELEMENTARY															
Ashland Ranch	787	787	768	561	704	796	807	805	796	787	793	712	9	-3	-81
Augusta Ranch	980	948	947	750	911	916	934	919	904	874	864	773	-64	-52	-90
Boulder Creek	574	556	532	401	498	435	446	552	666	770	875	1,161	-139	440	286
Burk	344	355	349	238	517	465	476	488	482	482	464	426	121	-1	-38
Canyon Rim	781	779	746	585	740	810	811	733	704	685	650	586	29	-160	-64
Carol Rae Ranch	527	531	506	408	526	551	538	511	495	490	480	436	24	-71	-44
Finley Farms	649	662	642	489	594	626	716	726	706	698	700	528	-23	74	-172
Gilbert	496	480	514	396	555	559	584	603	621	608	592	513	63	33	-79
Greenfield	918	959	1,028	831	993	947	933	887	860	792	750	656	29	-197	-95
Harris	444	428	444	313	384	365	345	325	304	280	275	271	-79	-90	-5
Highland Park	865	856	840	702	788	800	798	780	761	742	706	611	-65	-94	-95
Houston	348	336	332	238	0	0	0	0	0	0	0	0	-348	0	0
Islands	509	538	571	437	526	514	507	533	514	508	496	452	5	-18	-44
Meridian	799	730	683	575	671	740	737	790	784	756	733	638	-59	-7	-96
Mesquite	578	578	590	463	570	591	579	568	543	502	481	388	13	-110	-92
Neely Traditional	783	802	780	546	764	806	789	771	761	743	731	734	23	-75	3
Oak Tree	535	499	470	344	419	404	390	377	358	332	329	330	-131	-75	1
Patterson	561	565	591	455	563	544	533	514	491	480	467	447	-17	-77	-20
Pioneer	508	534	541	370	422	404	385	382	356	344	337	313	-104	-67	-24
Playa Del Rey	433	421	440	339	439	429	457	470	503	512	521	472	-4	92	-50
Quartz Hill	645	639	575	436	493	543	518	513	536	511	495	477	-102	-48	-18
Settler´s Point	579	625	609	468	570	555	546	514	510	469	466	411	-24	-89	-55
Sonoma Ranch	438	440	458	377	481	460	469	449	435	420	403	361	22	-57	-42
Spectrum	578	580	618	408	520	554	557	536	518	502	481	431	-24	-73	-50
Superstition Springs	696	700	740	595	730	766	775	777	766	770	771	720	70	5	-51
Towne Meadows	688	622	668	587	695	652	643	604	573	543	538	481	-36	-114	-57
Val Vista Lakes	515	497	518	429	504	479	478	457	447	441	434	405	-36	-45	-29
Other	23	21	30	2,766	324	107	107	107	107	107	107	107	84	0	0
Total	16,581	16,468	16,530	15,507	15,901	15,818	15,859	15,691	15,499	15,145	14,939	13,838	-763	-879	-1,101

Source: Applied Economics, 2023.

TABLE 26
SECONDARY ENROLLMENT BY SCHOOL

	Actual												2017-2022	2022-2027	2027-2032
	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	...2032/33			
JUNIOR HIGH*															
Desert Ridge Junior High	1,242	1,182	1,100	860	1,039	970	920	957	1,007	1,061	1,081	1,068	-272	111	-14
Gilbert Junior High	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Greenfield Junior High	911	900	1,056	920	1,144	1,203	1,249	1,237	1,246	1,249	1,221	1,022	292	18	-199
Highland Junior High	1,221	1,269	1,279	1,004	1,040	978	988	1,032	1,088	1,136	1,150	1,078	-243	172	-72
Mesquite Junior High	995	969	924	691	895	812	805	820	848	879	888	797	-183	76	-91
South Valley Junior High	1,022	1,047	1,026	754	881	852	801	803	820	827	802	685	-170	-50	-117
Gilbert Classical Academy	241	271	295	191	243	208	195	204	204	204	204	204	-33	-4	0
Other	25	35	51	1,059	99	101	65	68	68	68	68	68	76	-33	0
Total	5,657	5,673	5,731	5,479	5,341	5,124	5,023	5,122	5,281	5,423	5,414	4,921	-533	290	-493
HIGH SCHOOL*															
Campo Verde High	2,042	2,059	2,119	1,770	1,978	1,995	1,941	1,889	1,804	1,801	1,800	1,751	-47	-195	-48
Desert Ridge High	2,839	2,832	2,617	2,194	2,451	2,243	2,231	2,207	2,204	2,237	2,305	2,579	-596	62	275
Gilbert High	2,157	2,130	2,153	1,883	2,342	2,277	2,295	2,245	2,127	2,090	2,051	1,935	120	-226	-116
Highland High	3,150	3,143	3,341	2,987	3,226	3,150	3,109	3,047	2,903	2,910	2,940	2,903	0	-210	-37
Mesquite High	1,701	1,546	1,505	1,184	1,448	1,395	1,264	1,168	1,114	1,065	1,100	1,245	-306	-295	145
Gilbert Classical Academy	315	335	385	304	416	391	404	401	403	403	403	403	76	12	0
Other	100	166	163	1,841	329	624	635	635	635	635	635	635	524	11	0
Total	12,304	12,211	12,282	12,163	12,190	12,075	11,879	11,592	11,190	11,141	11,233	11,451	-229	-842	218

Source: Applied Economics, 2023.

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