

*Pflugerville
Independent
School
District*

Fall 2013
Demographic
Study



*Learn from Yesterday...
Understand Today...
Plan for Tomorrow*



TEMPLETON
DEMOGRAPHICS



Economic Conditions



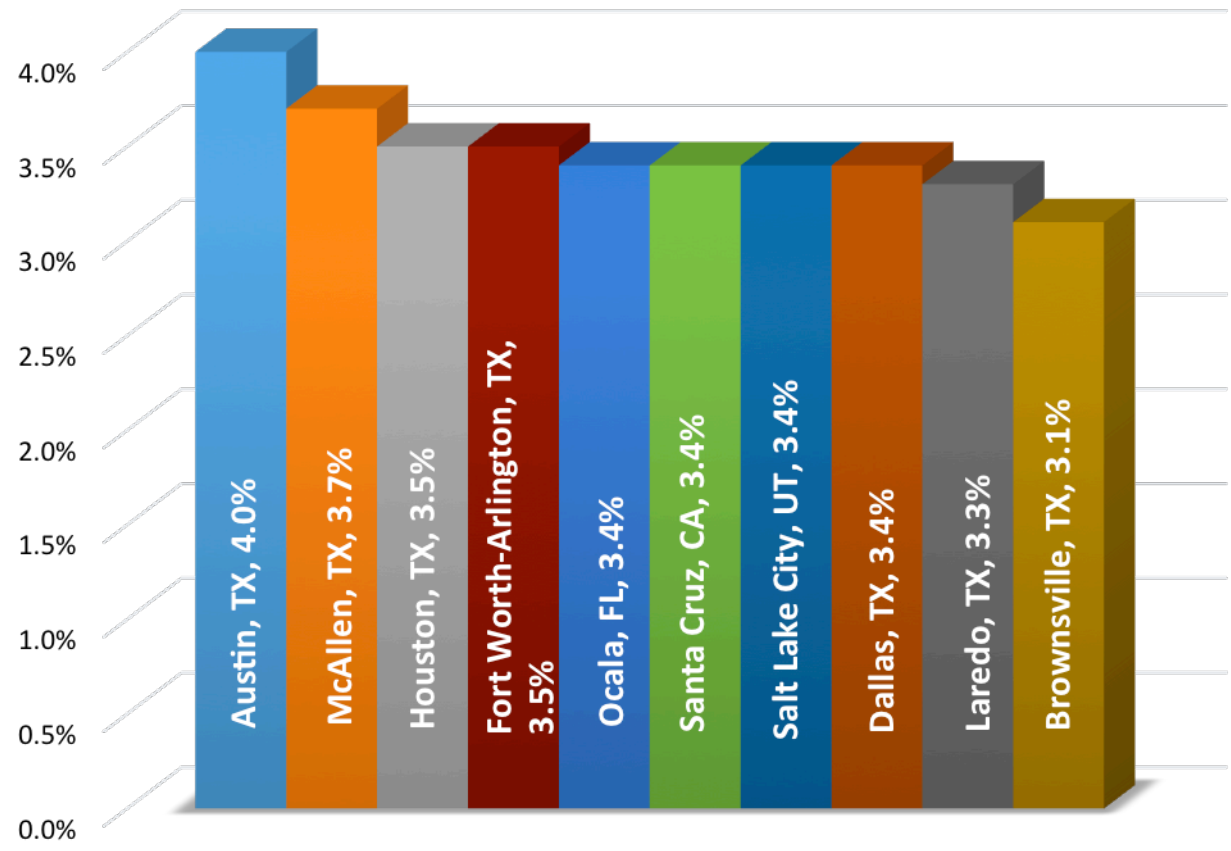
- **Texas added 1 new job for every 3 people** from 2000 to 2013, the U.S. added 1 job for every 7 people, **Texas outperformed the U.S.** job creation rate by more than **two-to-one**. (Forbes)
- Texas has created more than **270 thousand non-farm jobs** in the last 12 months. (Texas Comptroller's Office)
- The state's unemployment rate has been at or below the national rate for **82 consecutive months**. (<http://www.thetexaseconomy.org/economic-outlook/>)
- Unemployment rates - Texas Labor Market Information (August 2013)
 - U.S. 7.3%
 - Texas 6.3%
 - Austin MSA 5.2%
 - Travis County 5.1%
 - Pflugerville 4.8%
- **Apartment vacancy rate is below 6%** which has led to a strong average monthly rent of \$1,015, a **4.2% increase** over last year.
- Austin MSA home builders have built almost **10,000 houses** in the last 12 months (Metrostudy)





National Economic Overview

Top Job Growth Markets Ranked by Percent Change in Emp. – Sept. 2013



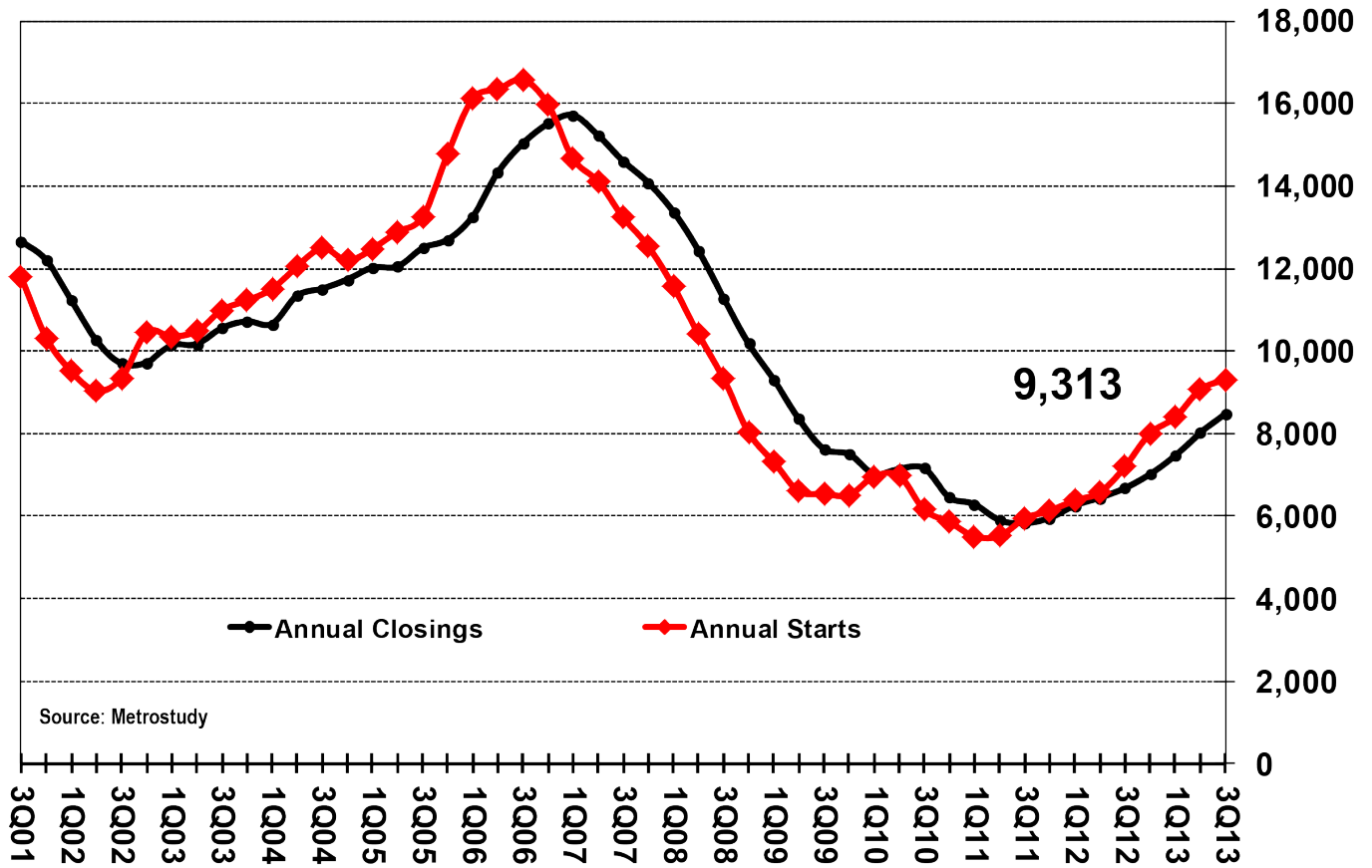
7 out of the top 10 job growth cities are in Texas.





Austin Market

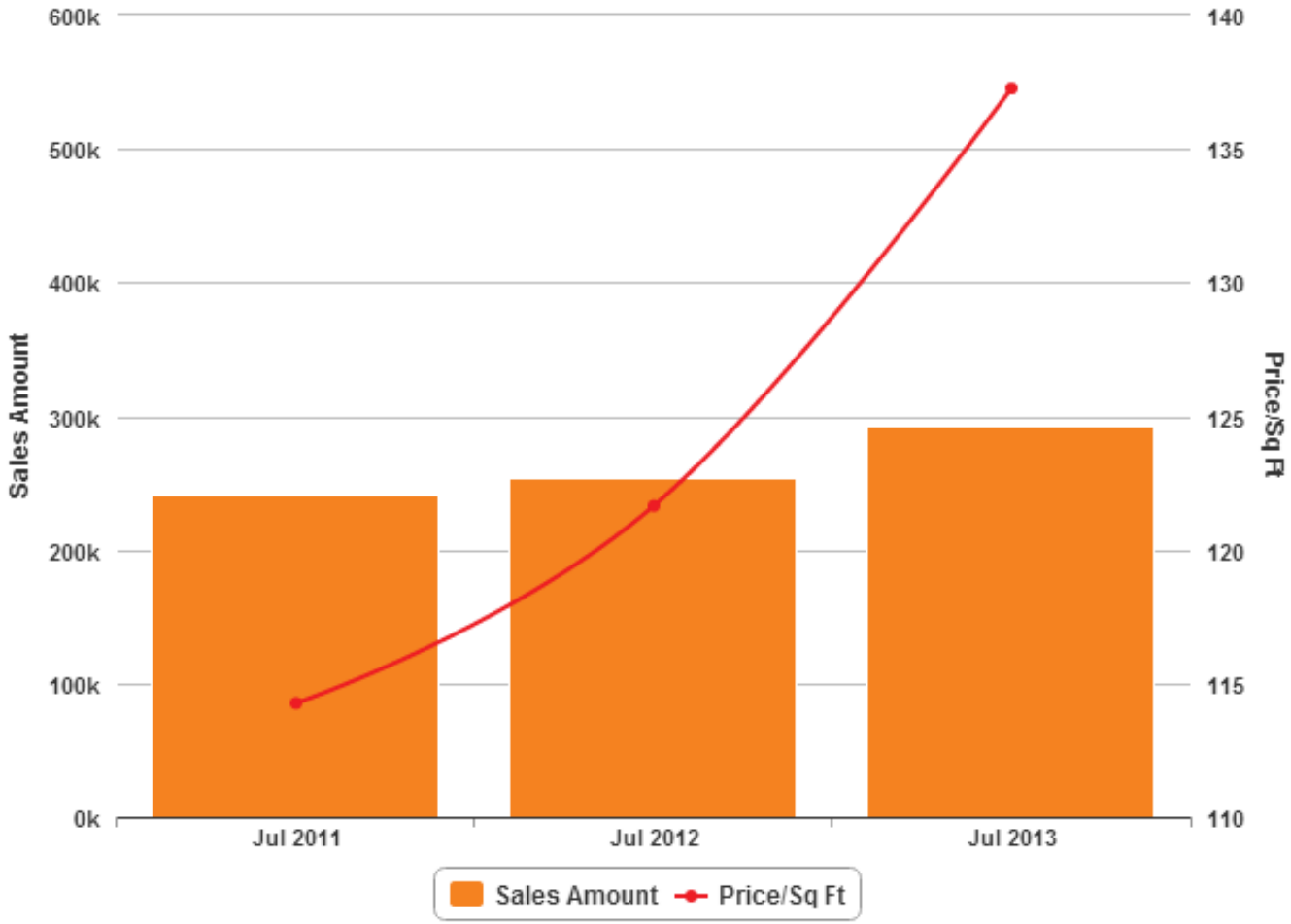
Starts and Closings 3Q01-3Q13





Economic Overview

Year over Year Change in Price and Price/Sq. Ft.



Source: Housing Intelligence Pro



Austin Market Year Over Year Comparison

Multiple Listing Service – YTD SFD Activity & Inventory

	Sept-13	%Change
YTD Sales	23,984	23%
Average Price	285,300	11%
Median Price	223,000	13%
Listings	5,965	-12%
DOM	44	-33%
Monthly Supply	2.7	-27%

*Listings are not necessarily down, houses are selling quicker and many sell prior to listing



Source: Austin Board of
Realtor MLS (ABOR)



New Home Ranking Report by ISD – 3Q13

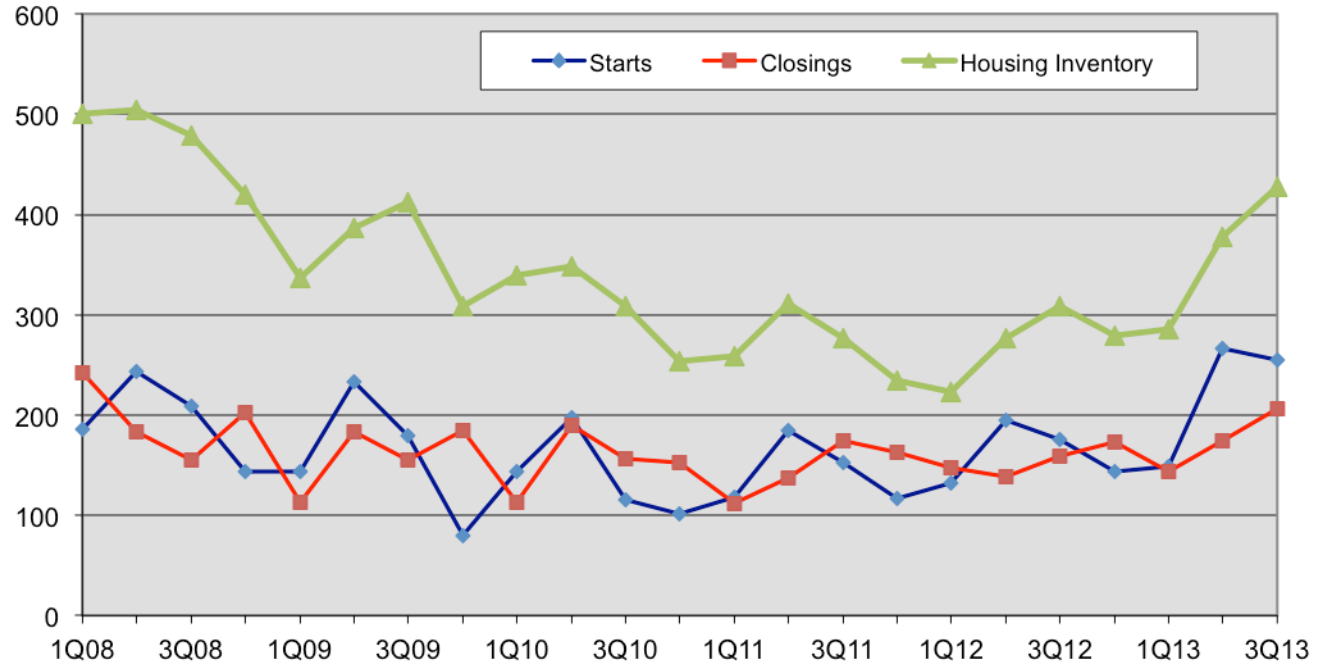
Austin Area

Rank	District Name	Annual Starts	Annual Closings	VDL	Future
1	Leander ISD	1,805	1,783	2,052	8,928
2	Austin ISD	1,512	1,572	1,412	12,529
3	Round Rock ISD	1,222	1,163	1,034	2,698
4	Hays CISD	912	831	1,269	11,211
5	Lake Travis ISD	858	734	1,934	4,773
6	Pflugerville ISD	815	696	760	7,543
7	Georgetown ISD	825	691	1,284	15,432
8	Manor ISD	528	527	621	17,202
9	Dripping Springs ISD	385	321	1,040	4,943
10	Del Valle ISD	291	297	315	16,364
11	Hutto ISD	364	256	548	6,127
12	San Marcos ISD	136	143	178	5,013
13	Jarrell ISD	139	126	255	7,512
14	Liberty Hill ISD	161	107	585	8,332
15	Bastrop ISD	72	60	395	12,022
16	Eanes ISD	23	22	207	323
17	Lago Vista ISD	1	17	407	3,065
18	Taylor ISD	19	14	116	545
19	Wimberley ISD	10	8	71	0
20	Elgin ISD	3	6	209	4,525
21	Johnson City ISD	0	1	81	0
22	Giddings ISD	0	0	0	89
23	Lockhart ISD	0	0	183	673
24	Smithville ISD	0	0	119	412
	Totals	10,081	9,375	15,075	150,261



New Housing Activity

Pflugerville ISD New Housing Information



Starts	2008	2009	2010	2011	2012	2013
1Q	186	84	143	122	132	149
2Q	243	233	197	184	195	267
3Q	209	180	116	152	176	255
4Q	144	80	101	117	144	
Total	782	577	557	575	647	671

Closings	2008	2009	2010	2011	2012	2013
1Q	242	167	113	112	148	143
2Q	239	183	189	137	138	174
3Q	234	155	156	174	159	206
4Q	203	184	152	163	173	
Total	918	689	610	586	618	523

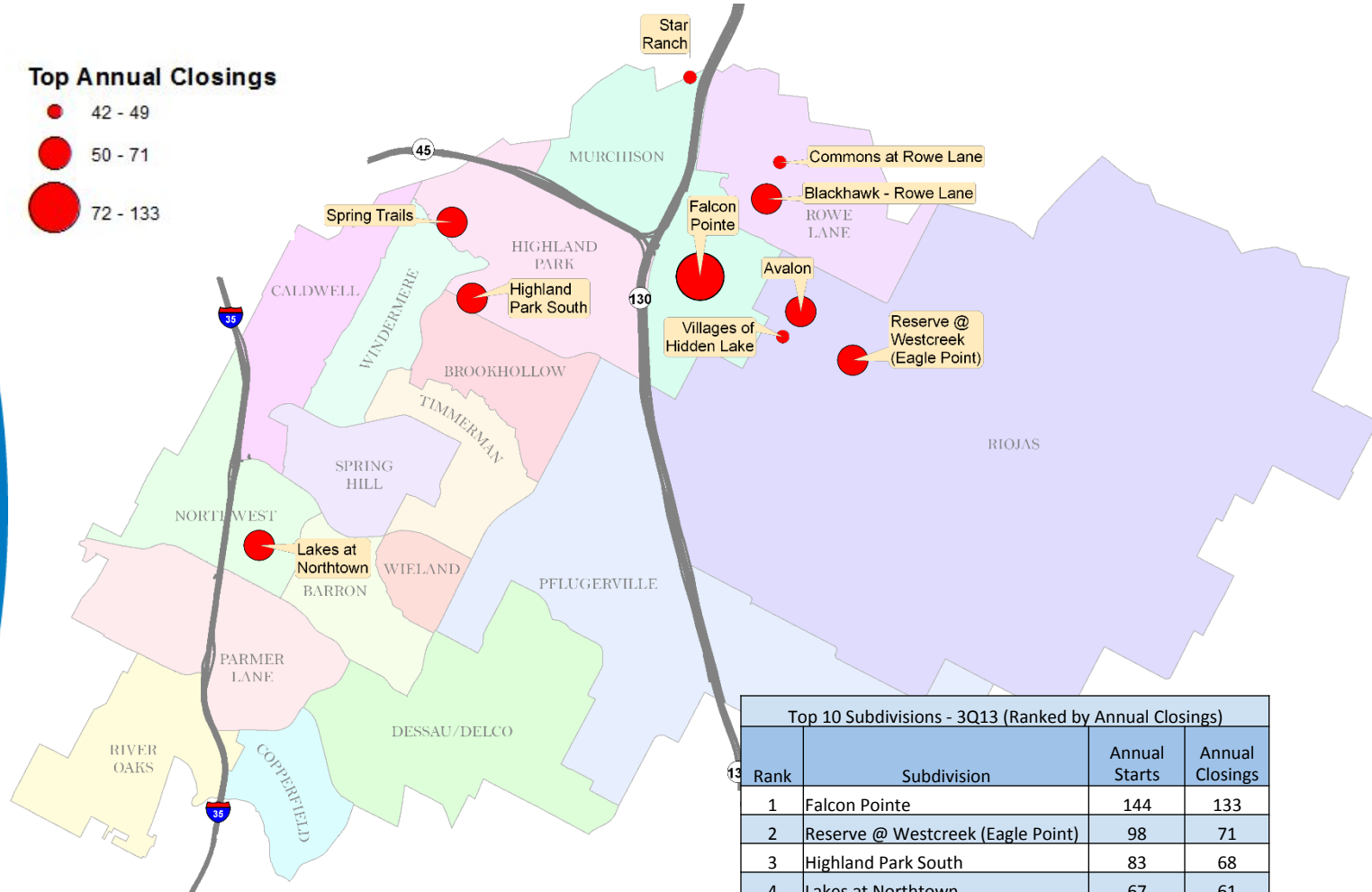
- 2013 YTD starts have surpassed the 2012 total and could reach a five year high of above 785 by year end.
- 3Q13 closes were above 200 for the first time since 4Q08.



Annual Closing Distribution 3Q13

Top Annual Closings

- 42 - 49
- 50 - 71
- 72 - 133

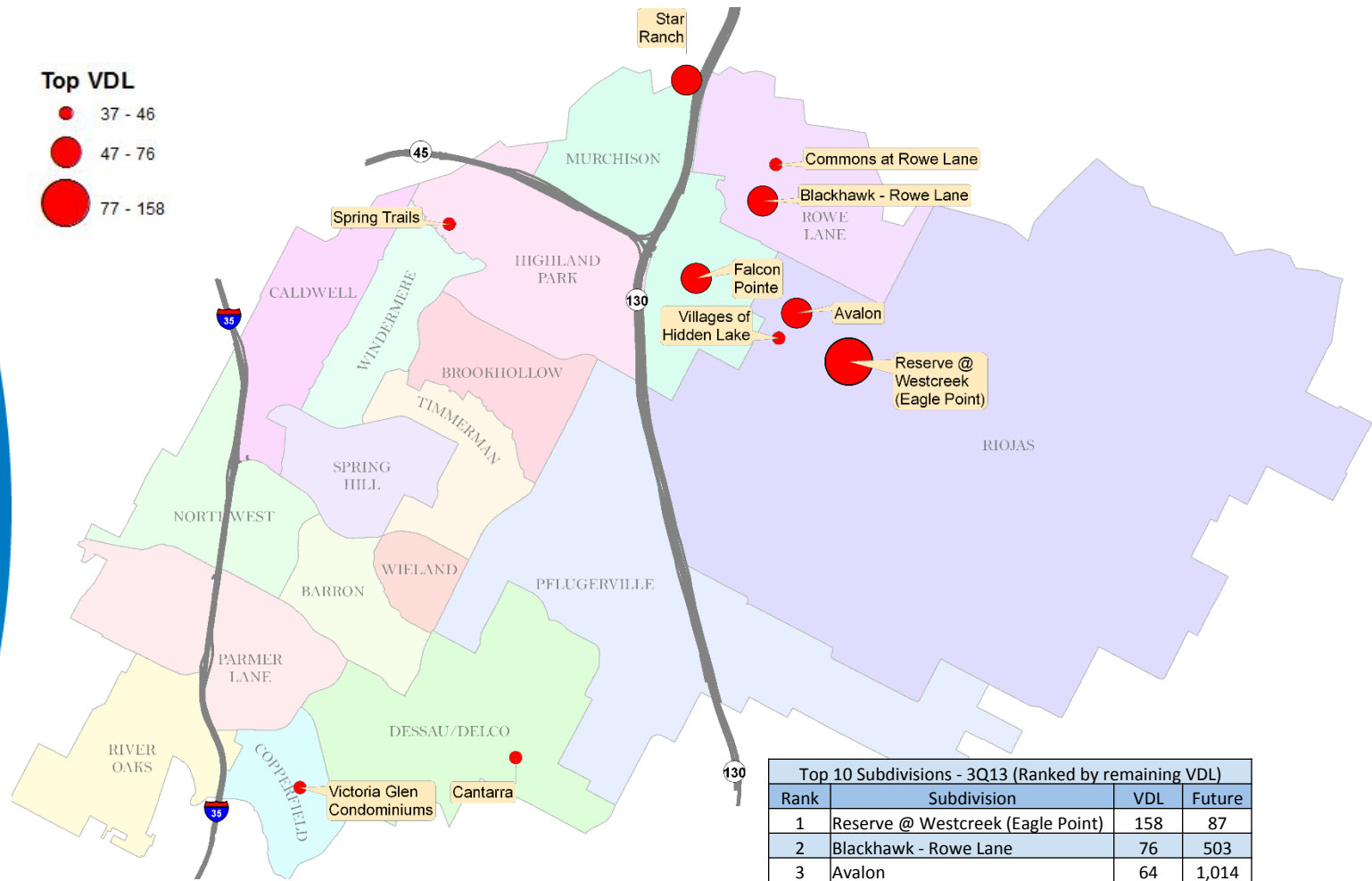
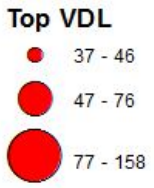


Top 10 Subdivisions - 3Q13 (Ranked by Annual Closings)			
Rank	Subdivision	Annual Starts	Annual Closings
1	Falcon Point	144	133
2	Reserve @ Westcreek (Eagle Point)	98	71
3	Highland Park South	83	68
4	Lakes at Northtown	67	61
5	Blackhawk - Rowe Lane	67	60
6	Avalon	55	56
7	Spring Trails	51	56
8	Star Ranch	64	49
9	Villages of Hidden Lake	58	47
10	Commons at Rowe Lane	59	42
TOTALS		746	643





Vacant Developed Lots 3Q13



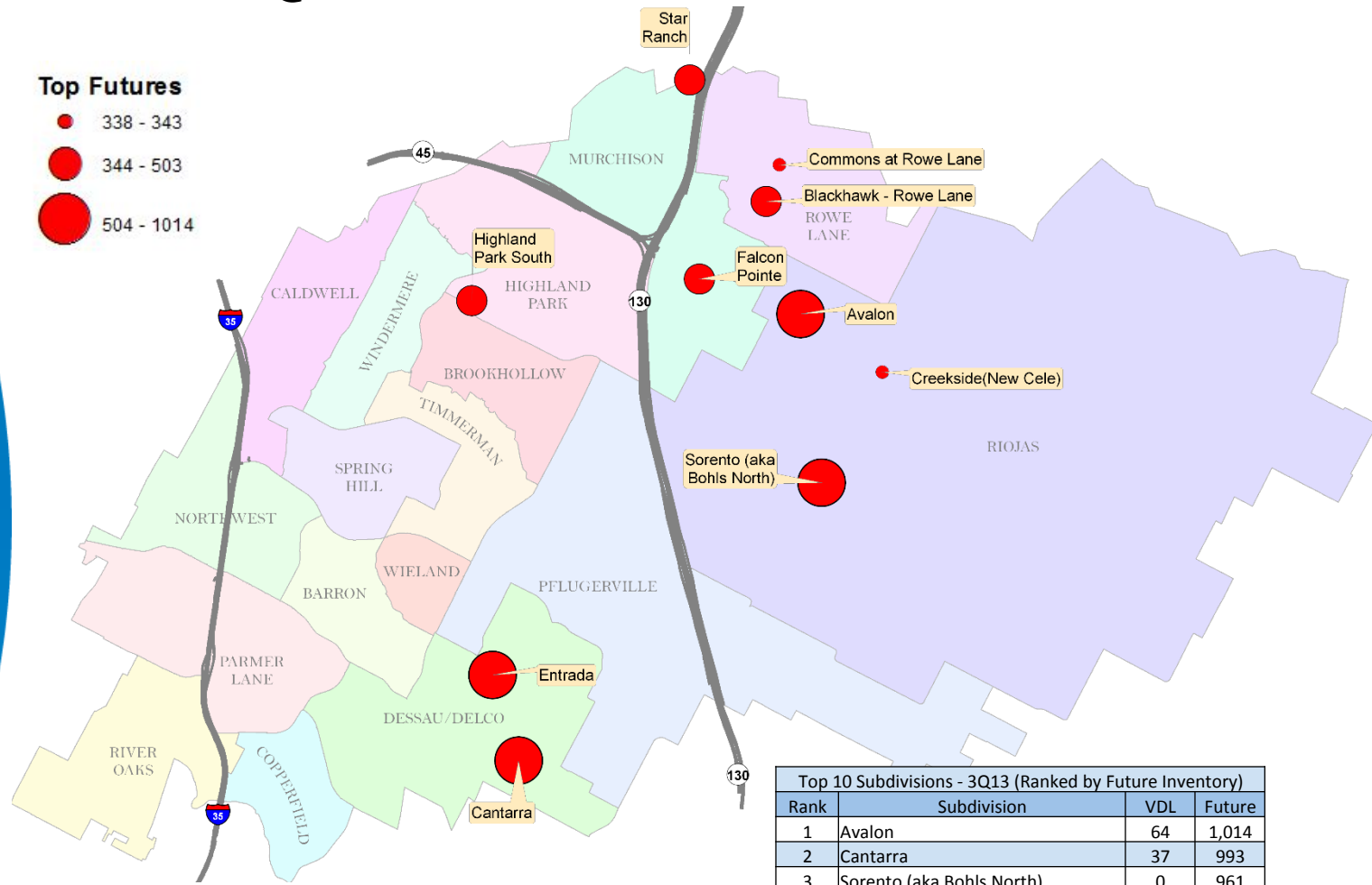
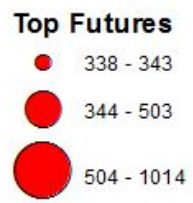
Top 10 Subdivisions - 3Q13 (Ranked by remaining VDL)

Rank	Subdivision	VDL	Future
1	Reserve @ Westcreek (Eagle Point)	158	87
2	Blackhawk - Rowe Lane	76	503
3	Avalon	64	1,014
4	Star Ranch	63	434
5	Falcon Pointe	61	411
6	Villages of Hidden Lake	46	207
7	Commons at Rowe Lane	45	338
8	Victoria Glen Condominiums	41	0
9	Spring Trails	40	107
10	Cantarra	37	993
TOTALS		631	4,094





Future Lots 3Q13



Top 10 Subdivisions - 3Q13 (Ranked by Future Inventory)			
Rank	Subdivision	VDL	Future
1	Avalon	64	1,014
2	Cantarra	37	993
3	Sorento (aka Bohls North)	0	961
4	Entrada	0	841
5	Blackhawk - Rowe Lane	76	503
6	Highland Park South	4	448
7	Star Ranch	63	434
8	Falcon Pointe	61	411
9	Creekside(New Cele)	0	343
10	Commons at Rowe Lane	45	338
TOTALS		350	6,286





Overall Housing Data

by Elementary Attendance Zone

Elementary Zone	Annual Starts	Quarter Starts	Annual Closings	Quarter Closings	Total Inventory	VDL	Future
BARRON	0	0	0	0	0	0	228
BROOKHOLLOW	0	0	0	0	0	0	0
CALDWELL	0	0	0	0	0	2	68
COPPERFIELD	40	11	37	11	22	92	81
DESSAU/DELCO	17	7	5	1	14	37	2064
HIGHLAND PARK	134	37	124	40	75	44	555
MURCHISON	218	62	191	58	111	126	1001
NORTHWEST	67	21	61	21	28	27	0
PARMER LANE	0	0	0	0	0	0	0
PFLUGERVILLE	0	0	1	0	4	26	66
RIOJAS	213	71	175	51	101	285	2612
RIVER OAKS	0	0	0	0	0	0	0
ROWE LANE	126	46	102	24	72	121	841
SPRING HILL	0	0	0	0	0	0	0
TIMMERMAN	0	0	0	0	0	0	27
WIELAND	0	0	0	0	0	0	0
WINDERMERE	0	0	0	0	0	0	0
Grand Total	815	255	696	206	427	760	7,543

Total Inventory = Models + Finished Vacant + Under Construction





Enrollment History

Year (Oct.)	Other	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Growth	Percent
2009/10	757	1,716	1,769	1,640	1,776	1,634	1,580	1,576	1,628	1,639	1,755	1,617	1,595	1,373	22,055		
2010/11	808	1,655	1,788	1,768	1,691	1,799	1,677	1,664	1,657	1,694	1,818	1,647	1,548	1,542	22,756	701	3.18%
2011/12	786	1,687	1,745	1,815	1,788	1,723	1,840	1,697	1,697	1,681	1,699	1,708	1,616	1,576	23,058	302	1.33%
2012/13	804	1,747	1,726	1,772	1,814	1,804	1,732	1,853	1,720	1,724	1,683	1,684	1,662	1,617	23,342	284	1.23%
2013/14	763	1,665	1,750	1,770	1,753	1,800	1,777	1,766	1,882	1,701	1,758	1,694	1,695	1,685	23,459	117	0.50%

*Yellow box = largest grade per year
*Green box = second largest grade per year

- Enrollment growth declined to .5% adding 117 students
- Growth decline occurred at the Elementary grades.
- Significant portion of the decline believed to be from expansion of Charter Schools in the area.





Ten Year Forecast

By Grade Level

GRADE LEVEL ENROLLMENT HISTORY AND PROJECTIONS																	
Year (Oct.)	Other	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Growth	Percent
2009/10	756	1,716	1,770	1,643	1,776	1,634	1,580	1,576	1,628	1,639	1,755	1,618	1,596	1,373	22,060		
2010/11	808	1,656	1,789	1,770	1,691	1,800	1,677	1,664	1,657	1,694	1,820	1,647	1,548	1,542	22,763	703	3.19%
2011/12	792	1,688	1,746	1,816	1,788	1,723	1,840	1,697	1,697	1,681	1,700	1,709	1,617	1,576	23,070	307	1.35%
2012/13	807	1,747	1,726	1,773	1,814	1,804	1,732	1,853	1,720	1,724	1,683	1,684	1,663	1,617	23,347	277	1.20%
2013/14	763	1,665	1,750	1,770	1,753	1,800	1,777	1,766	1,882	1,701	1,758	1,694	1,695	1,685	23,459	112	0.48%
2014/15	763	1,725	1,677	1,817	1,833	1,726	1,810	1,818	1,821	1,918	1,730	1,741	1,644	1,682	23,705	246	1.05%
2015/16	763	1,776	1,776	1,734	1,842	1,852	1,747	1,736	1,863	1,846	1,981	1,723	1,699	1,644	23,982	277	1.17%
2016/17	763	1,813	1,832	1,836	1,758	1,867	1,884	1,681	1,769	1,881	1,931	1,976	1,696	1,698	24,385	403	1.68%
2017/18	763	1,866	1,870	1,882	1,874	1,782	1,892	1,817	1,722	1,796	1,948	1,922	1,930	1,692	24,756	371	1.52%
2018/19	763	1,911	1,925	1,923	1,921	1,901	1,813	1,827	1,863	1,760	1,860	1,940	1,882	1,928	25,217	461	1.86%
2019/20	763	1,962	1,969	1,980	1,960	1,961	1,936	1,743	1,873	1,897	1,838	1,852	1,902	1,880	25,516	299	1.19%
2020/21	763	2,002	2,029	2,024	2,019	1,996	1,997	1,835	1,787	1,910	1,981	1,829	1,812	1,899	25,883	367	1.44%
2021/22	763	2,052	2,073	2,087	2,065	2,053	2,032	1,907	1,883	1,823	1,990	1,972	1,791	1,809	26,300	417	1.61%
2022/23	763	2,109	2,125	2,132	2,127	2,107	2,092	1,930	1,957	1,920	1,903	1,981	1,931	1,788	26,865	565	2.15%
2023/24	763	2,155	2,187	2,188	2,179	2,169	2,148	1,983	1,981	1,996	2,004	1,895	1,940	1,928	27,516	651	2.42%

*Yellow box = largest grade per year

*Green box = second largest grade per year

- Five Year enrollment growth = 1,758
- Ten Year enrollment growth = 4,057





Summary

- Texas economy continues to out perform the nation with Austin MSA becoming the fastest growing city in the US with 1 Million or more residents.
- Austin MSA has one of the lowest unemployment rates in the state – 5.2%
- 3Q13 is slightly down from last quarter's 5 year high but still very strong as the YTD new home starts already exceed last year's year-end total by 24 units.
- Closings are up 17.5% over the YTD total from last year and will continue to increase over last year's total.

Pflugerville ISD

- Five year growth = 1,758 additional students with district enrollment of **25,217**.
- Ten year growth = 4,057 additional students with district enrollment of **27,516**.
- Five elementary schools over capacity by 2016.
- Park Crest is slightly over capacity and reaching 1,042 by Fall 2015.
- Hendricks H.S. exceeds 3,000 students by Fall 2016.