



Population &
Survey Analysts
www.pasatx.com

Willis ISD Demographic Study

Spring 2024



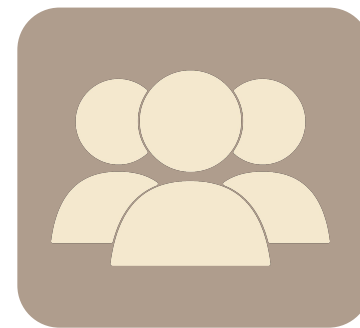
PASA'S APPROACH



**Collect
Background
Data**



**Study Housing
and Economic
Data**



**Study Past and
Current
Student
Population**



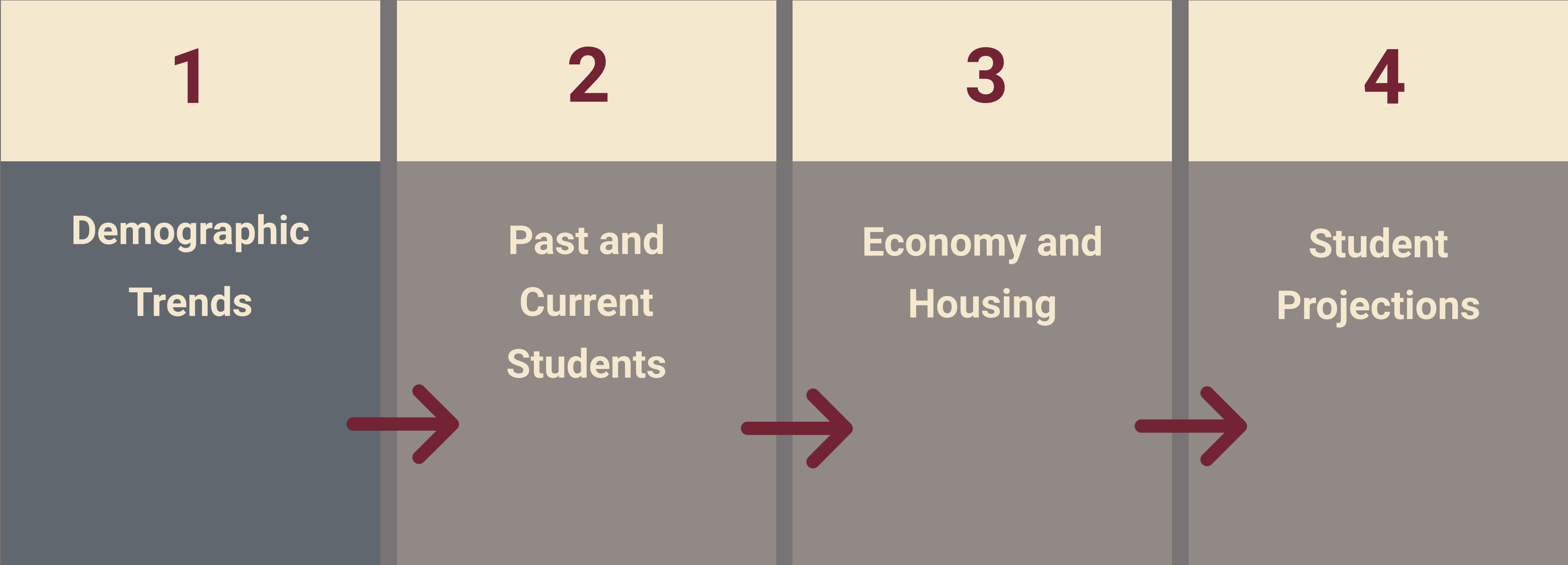
**Generate
Projections**



**Analyze Long
Range
Implications for
Facilities**

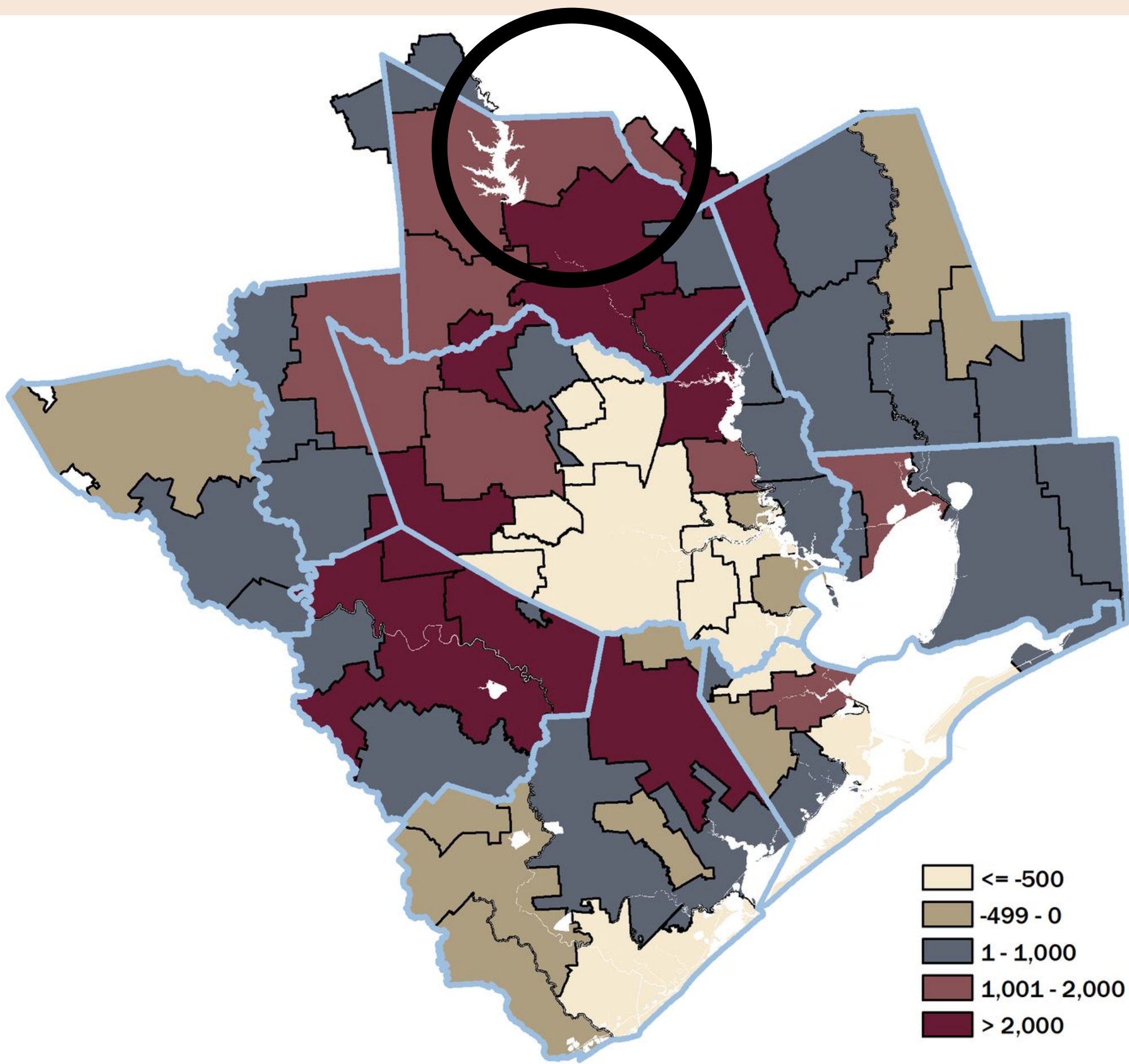


Demographic Study Components



5- Year Numerical Change in Enrollment

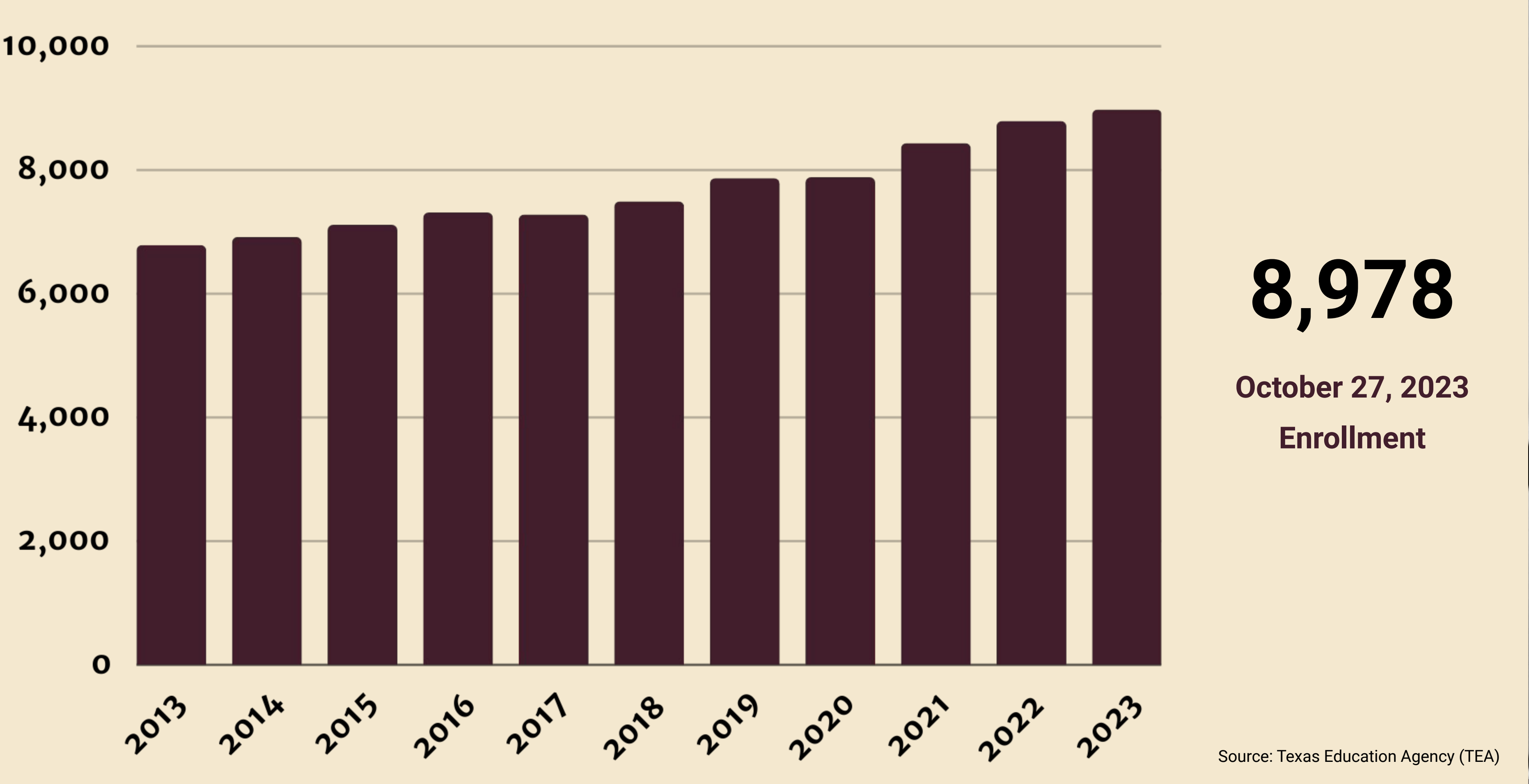
Fall 2017 - Fall 2022



| | District | Change |
|----|-------------------|--------------|
| 1 | Katy ISD | 15,145 |
| 2 | Lamar CISD | 10,315 |
| 3 | Conroe ISD | 9,203 |
| 4 | Humble ISD | 6,367 |
| 5 | Cleveland ISD | 5,993 |
| 6 | Tomball ISD | 5,493 |
| 7 | Fort Bend ISD | 4,385 |
| 8 | Alvin ISD | 4,336 |
| 9 | New Caney ISD | 3,298 |
| 10 | Barbers Hill ISD | 1,949 |
| 11 | Sheldon ISD | 1,890 |
| 12 | Waller ISD | 1,680 |
| 13 | Cypress-Fairbanks | 1,609 |
| 14 | Willis ISD | 1,514 |
| 15 | Dickinson ISD | 1,425 |

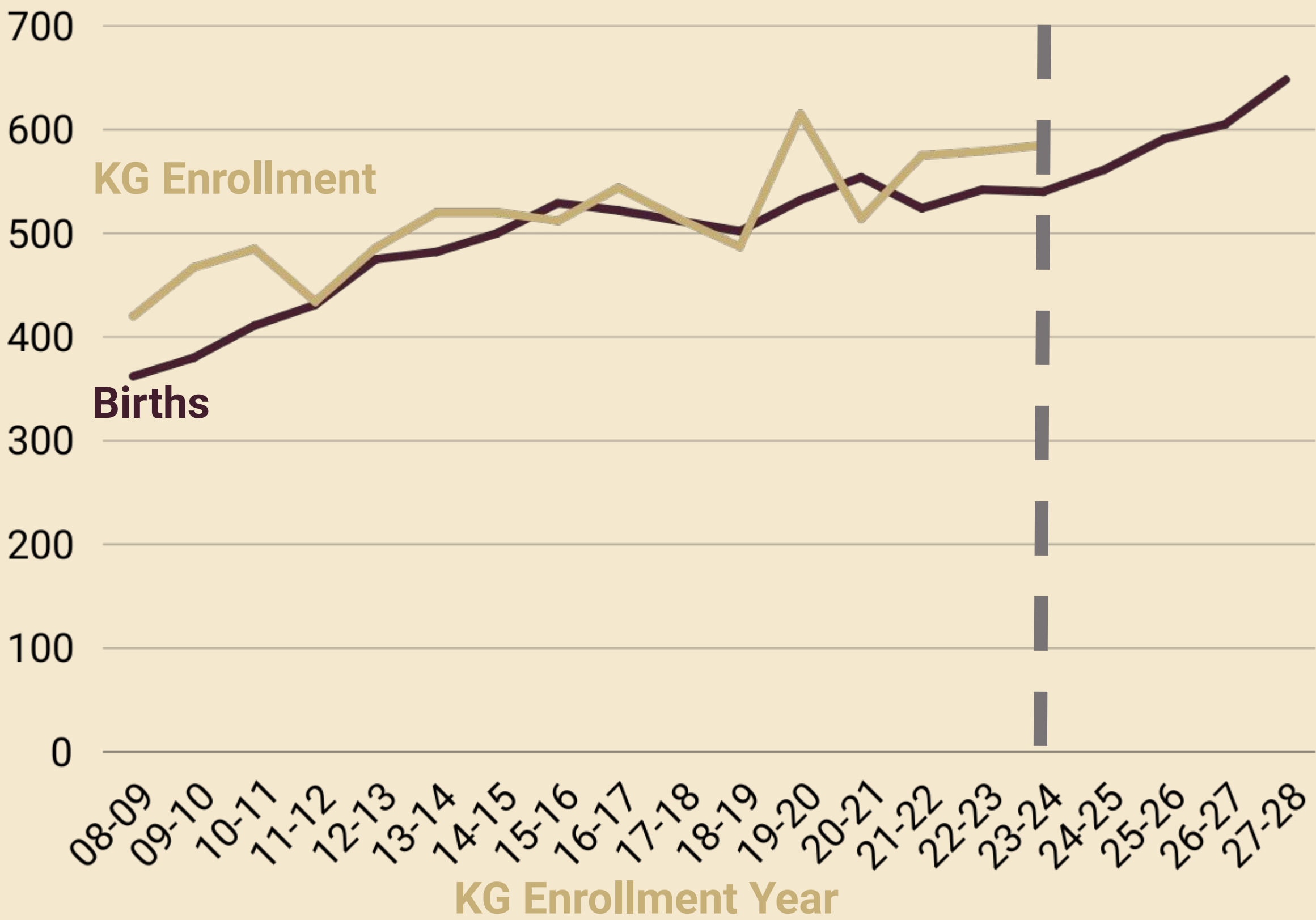
Source: Texas Education Agency (TEA)

Past Enrollment Change





KG Enrollment vs. Births



Difference between two lines shows in-migration of young children after birth

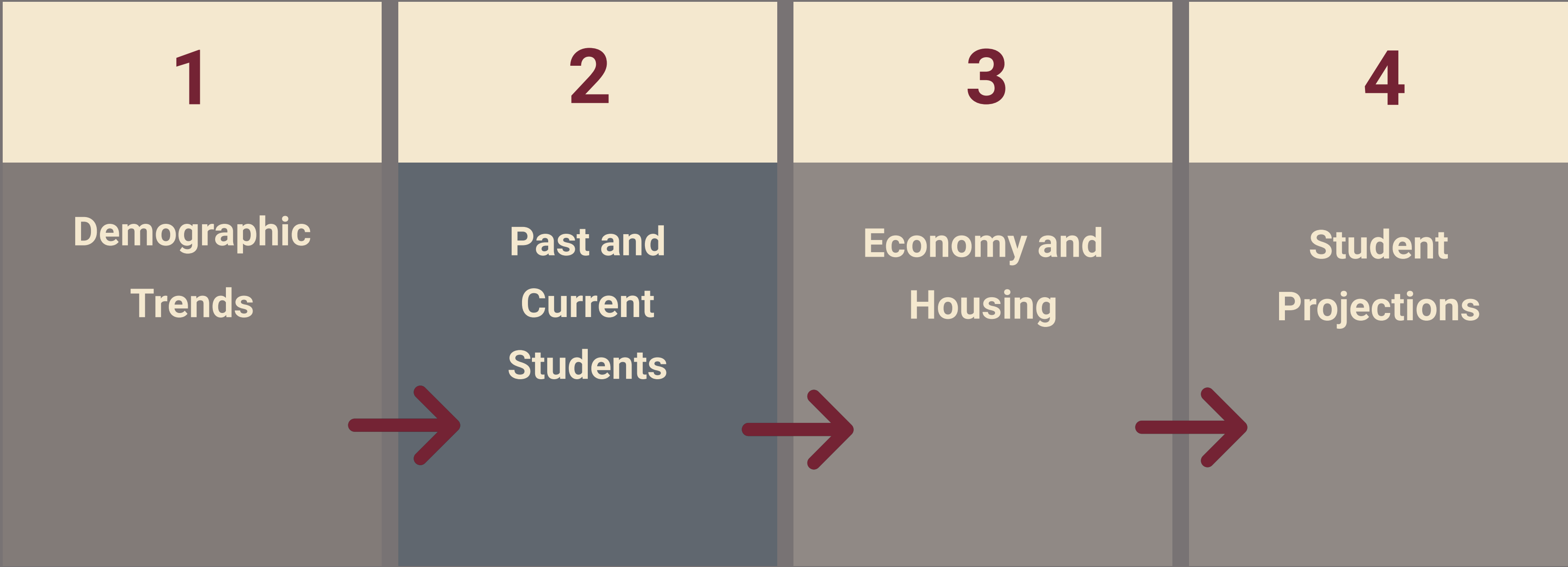
Births adjusted 5 years to align with KG Enrollment

Births by Zip Code of Birth Mother

Source: Texas Education Agency (TEA)
Source: Texas Department of Health and Human Services, Vital Statistics

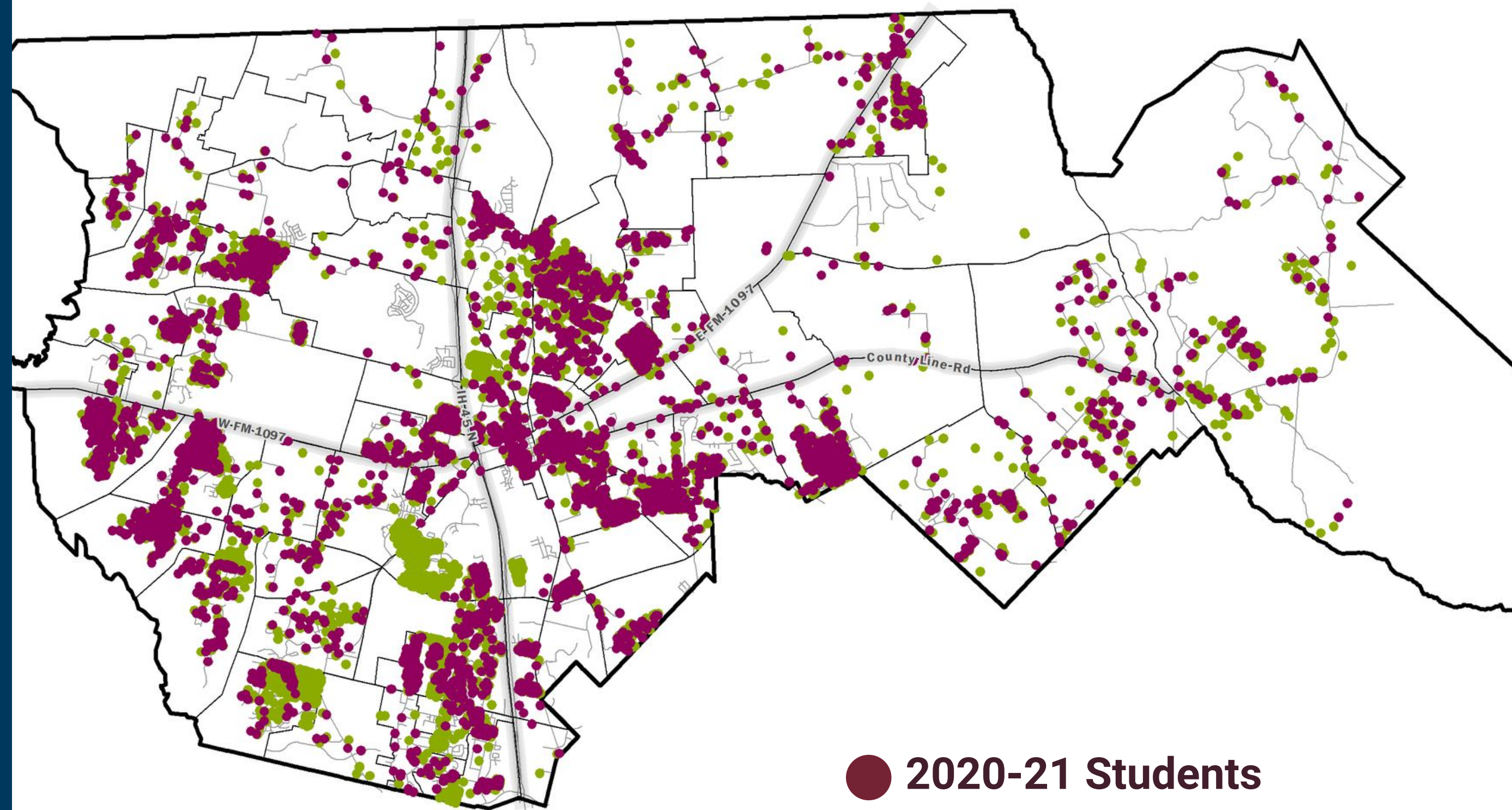


Demographic Study Components



Student Geocode

- Place each student on the map
- 99% accuracy
- Starting point for projections



● 2020-21 Students

● 2023-24 Students

Map Layers

□ District Boundary

□ Planning Units

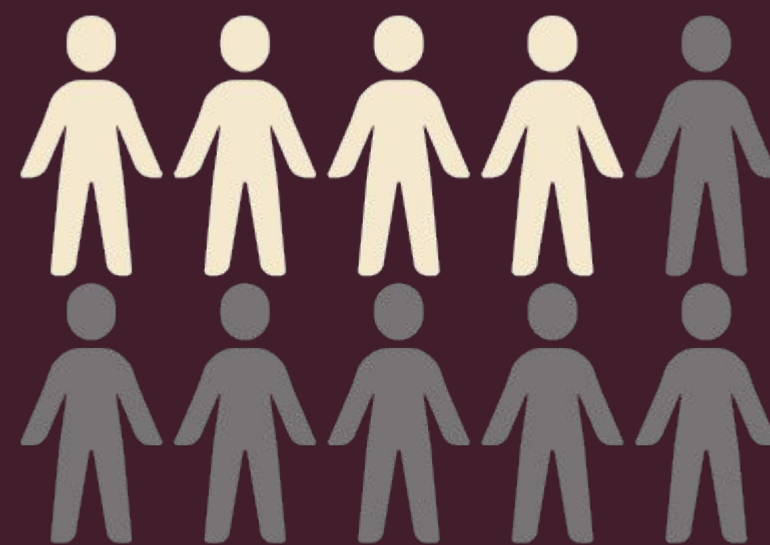
□ Streets

Green areas
highlight
new students that
didn't exist in 2020

Students Per Home

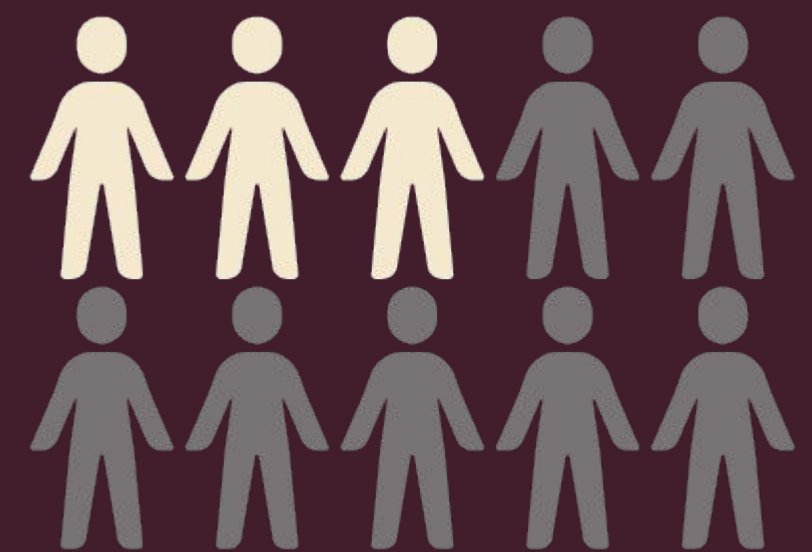
Single-Family

0.35

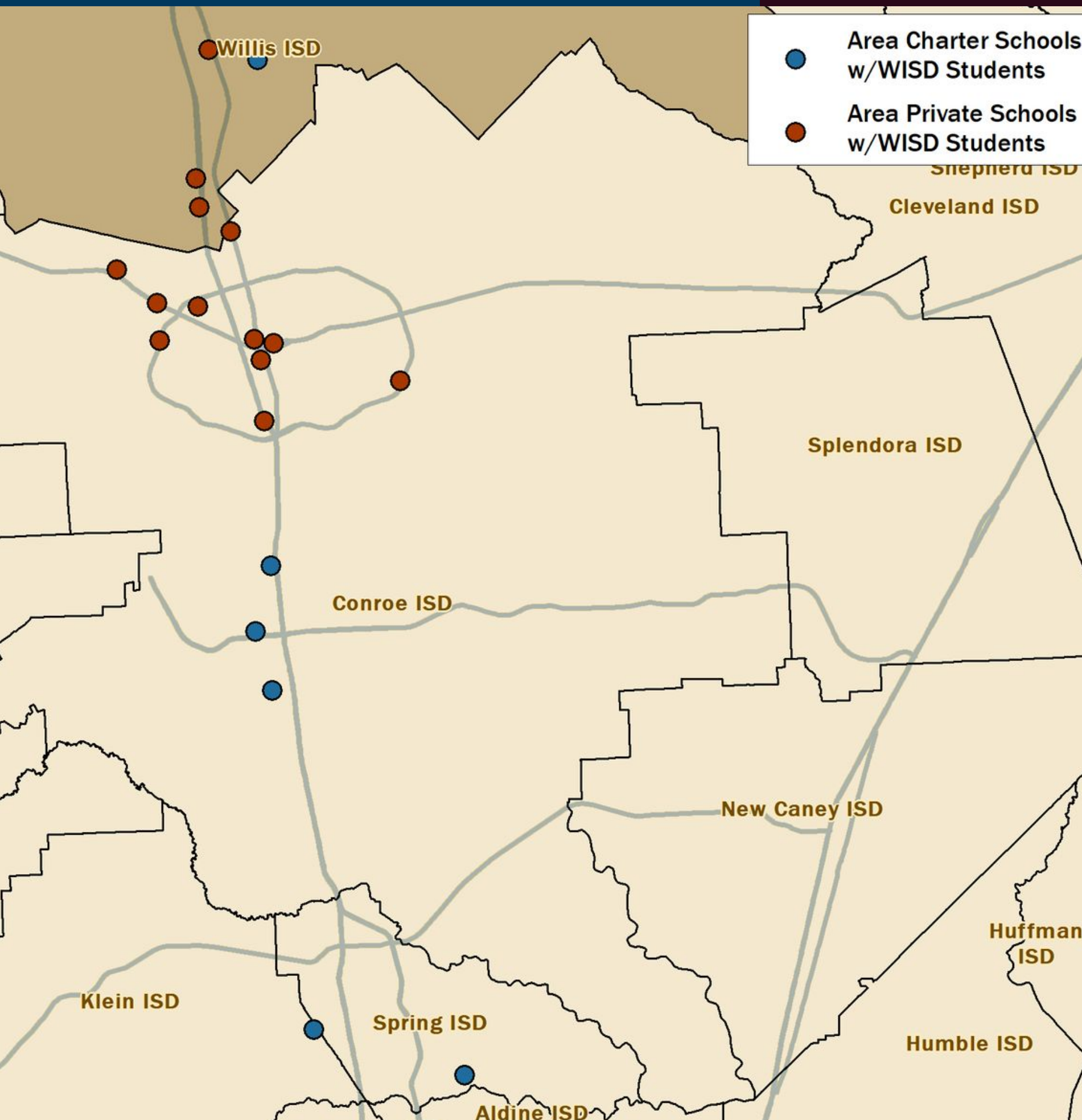


Multi-Family

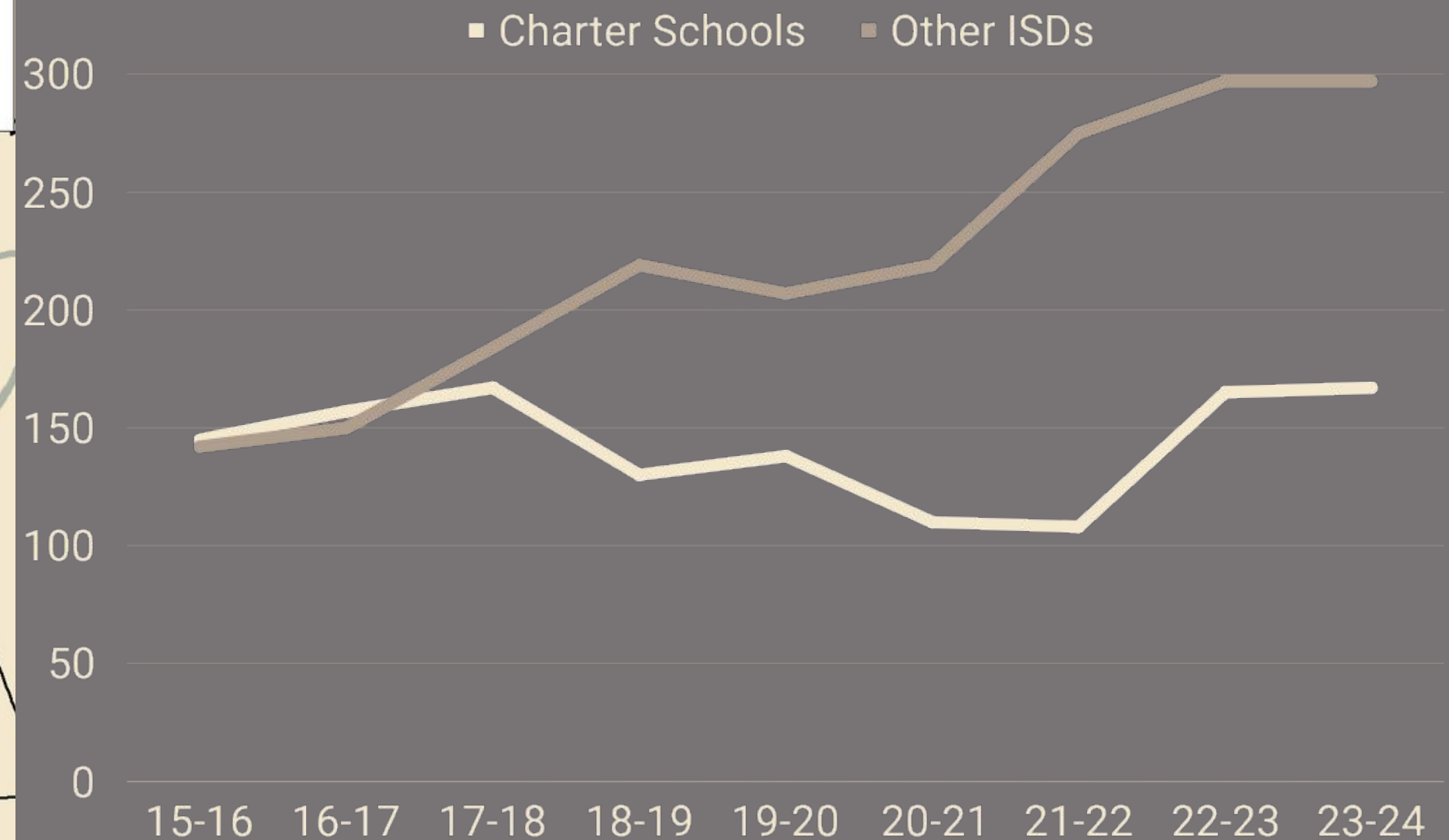
0.27



Charter Schools



WISD Residents Attending Charter Schools



Sources: TEA Transfer Reports and PASA Interviews

Texas College Prep Academies/ResponsiveEd

- Started in 1998 in Lewisville, Texas
- 43 campuses across Texas
- KG -12 variety of educational curriculum options, including Classical, Credit-Recovery, STEM (Science, Technology, Engineering, and Math), College Preparatory, Vocational, and Homeschooling
- ~16,400 students across 43 campuses

Founders Classical Academy-Conroe - Construction on a new high school site started in Spring 2023. Plans for completion in Spring 2024. Will be adding a grade level each year until reaching capacity at KG-12th in 2026-27.

92.4%

Reside in and
Attend WISD

1.8%

Attend
Charter Schools

2.7%

Attend
Private Schools

Currently, TEA does not provide data regarding
Homeschooling.



Demographic Study Components

1

**Demographic
Trends**

2

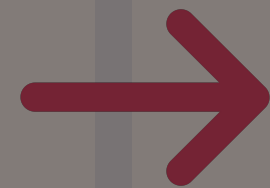
**Past and
Current
Students**

3

**Economy and
Housing**

4

**Student
Projections**



Economic and Housing Highlights

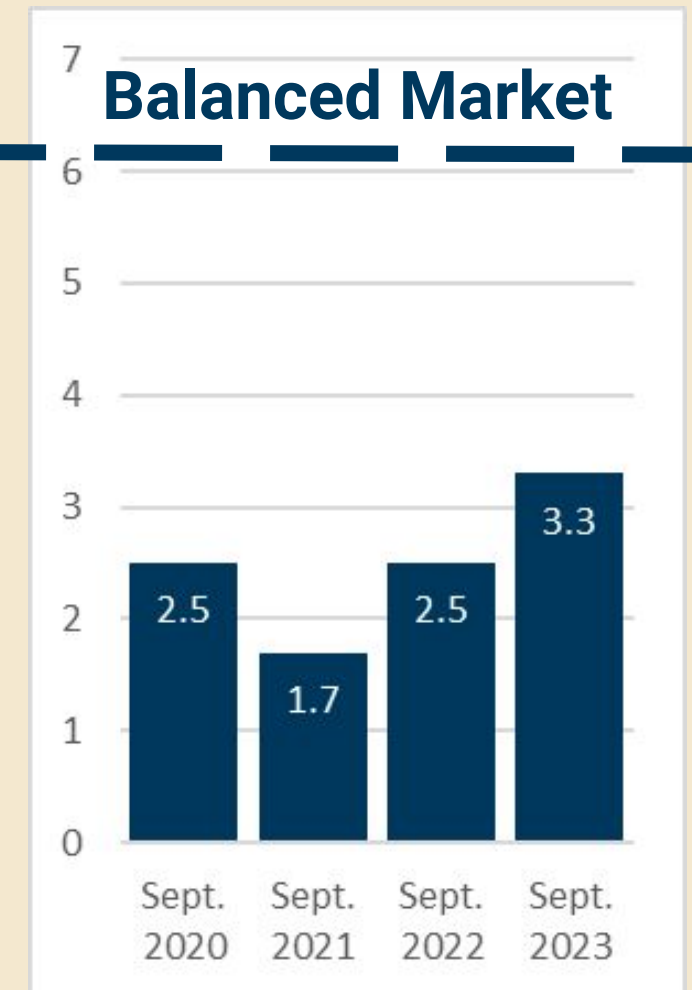


Robust in 2020 and 2021



Cooling since 2022

Months Inventory
Houston Metro
Market Area



Source: TRERC

30-Year Fixed Rate Mortgage Payments

Principal & Interest Only

| Home Price | | Mortgage Rate | | | | | |
|------------|--|---------------|---------|---------|---------|---------|---------|
| | | 3.00% | 4.00% | 5.00% | 6.00% | 7.00% | 8.00% |
| \$250,000 | | \$843 | \$955 | \$1,074 | \$1,199 | \$1,331 | \$1,468 |
| \$300,000 | | \$1,012 | \$1,146 | \$1,288 | \$1,439 | \$1,597 | \$1,761 |
| \$350,000 | | \$1,180 | \$1,337 | \$1,503 | \$1,679 | \$1,863 | \$2,055 |
| \$400,000 | | \$1,349 | \$1,528 | \$1,718 | \$1,919 | \$2,129 | \$2,348 |
| \$500,000 | | \$1,686 | \$1,910 | \$2,147 | \$2,398 | \$2,661 | \$2,935 |
| \$600,000 | | \$2,024 | \$2,292 | \$2,577 | \$2,878 | \$3,193 | \$3,522 |

*assumes 20% down payment

Housing Themes



Ratios of students to occupied home



Estate Lot Subdivisions



Build-to-Rent



Retirement Hub



Multi-Family in the I-45 Corridor

Developments with Largest 10-year Single-Family Projections

**3,441
units**

The Woodlands Hills

Howard Hughes Corp. is ramping up lot development in the 777 acres north of FM 830 where 1,891 homesites remain unoccupied. South of FM 830, another 1,561 lots are planned. This southern portion could begin developing within the next 2-4 years.

**1,597
units**

Republic Grand Ranch

Patten Properties is developing the 5,000-acre Republic Grand Ranch along and south of FM 1097 northeast of Caney Creek. Former timber land, this subdivision is being subdivided into majority 2-acre homesites.

**884
units**

Moran Ranch

Approximately 900 homes are planned in this new community east of I-45 and north of Seven Coves. Along the freeway, several multi-family tracts and many commercial/retail buildings are proposed.

**750
units**

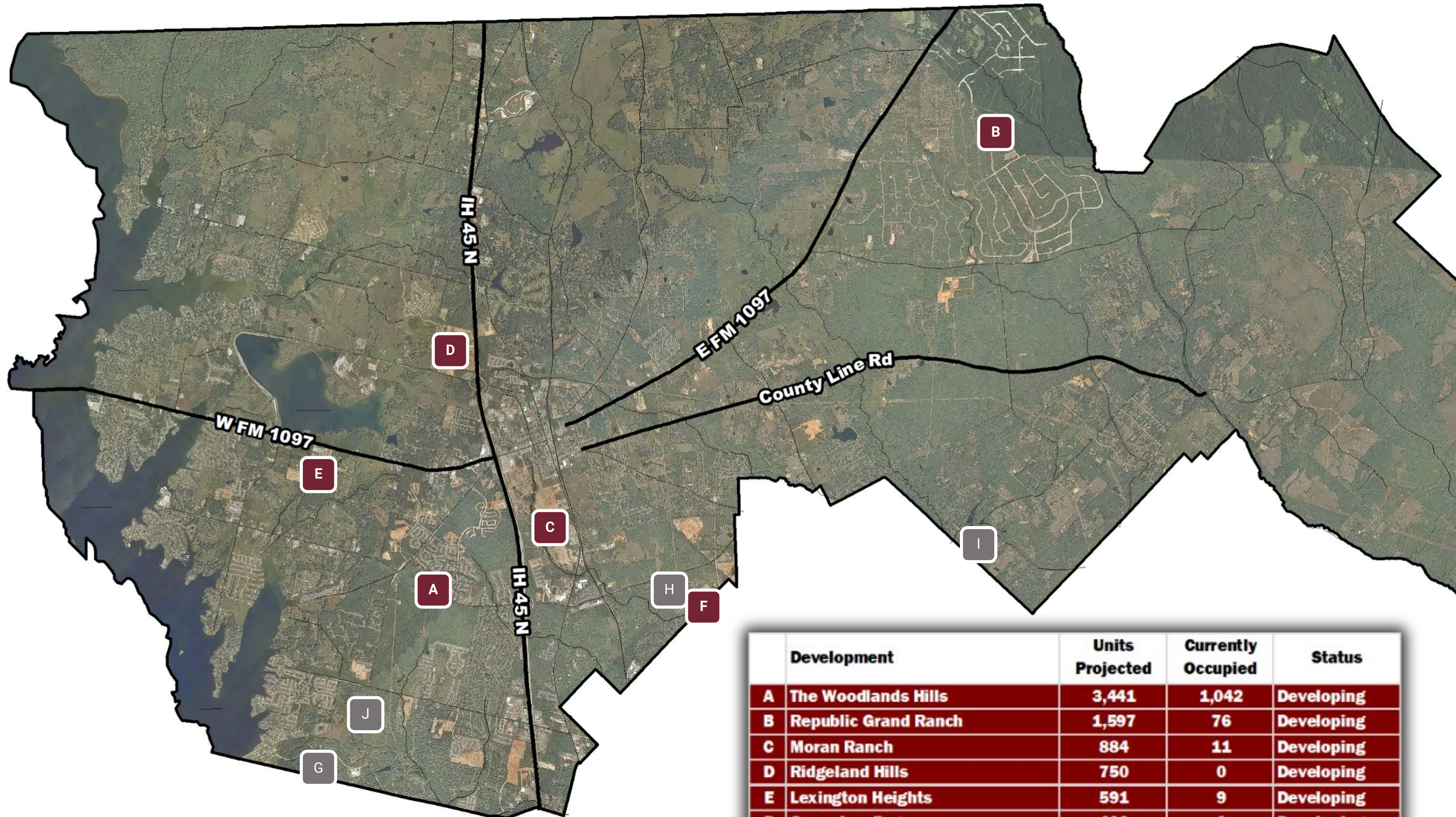
Ridgeland Hills

Camillo Development is developing 215 acres at the northwest corner of I-45 and Longstreet; total lot count is unconfirmed but PASA estimates 750 lots.

**600
units**

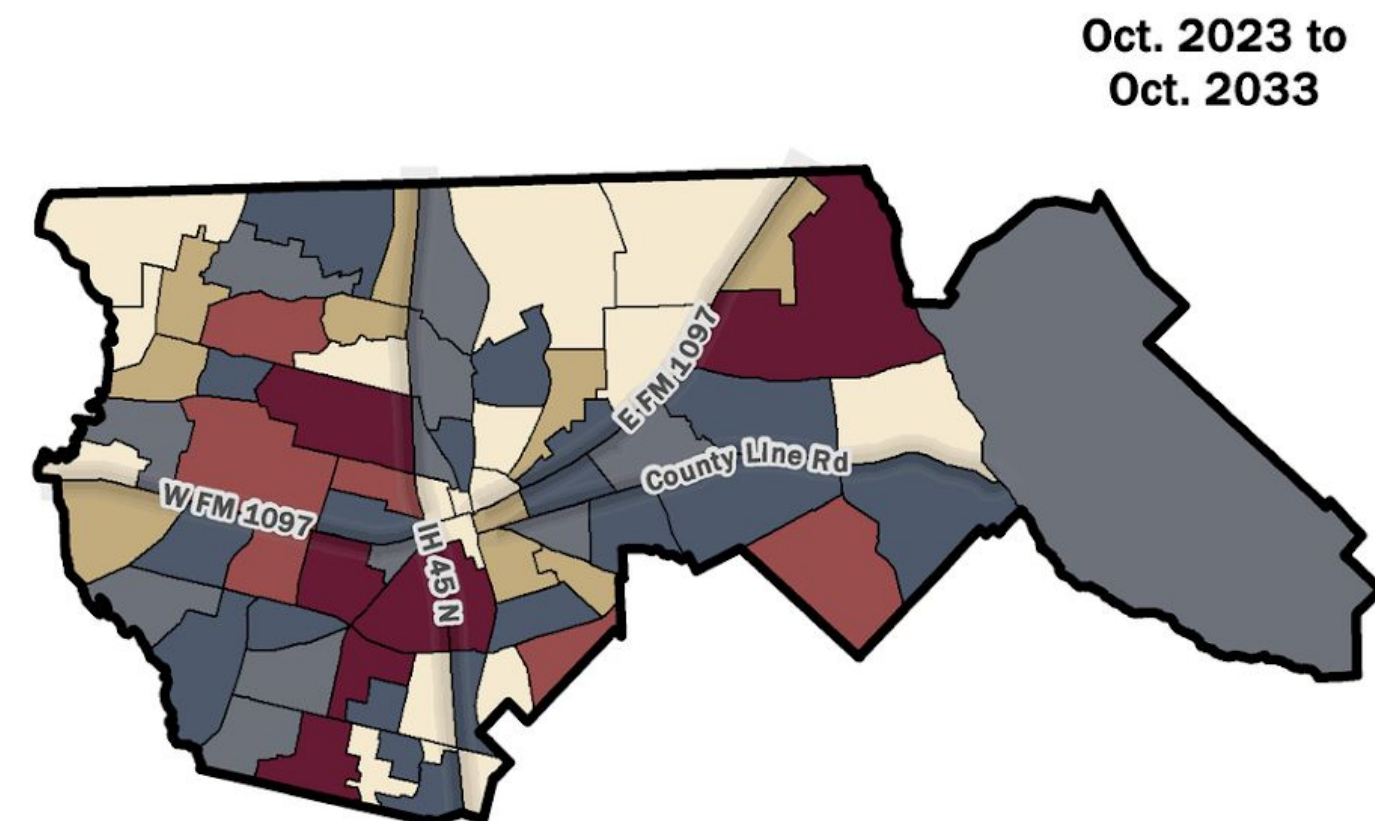
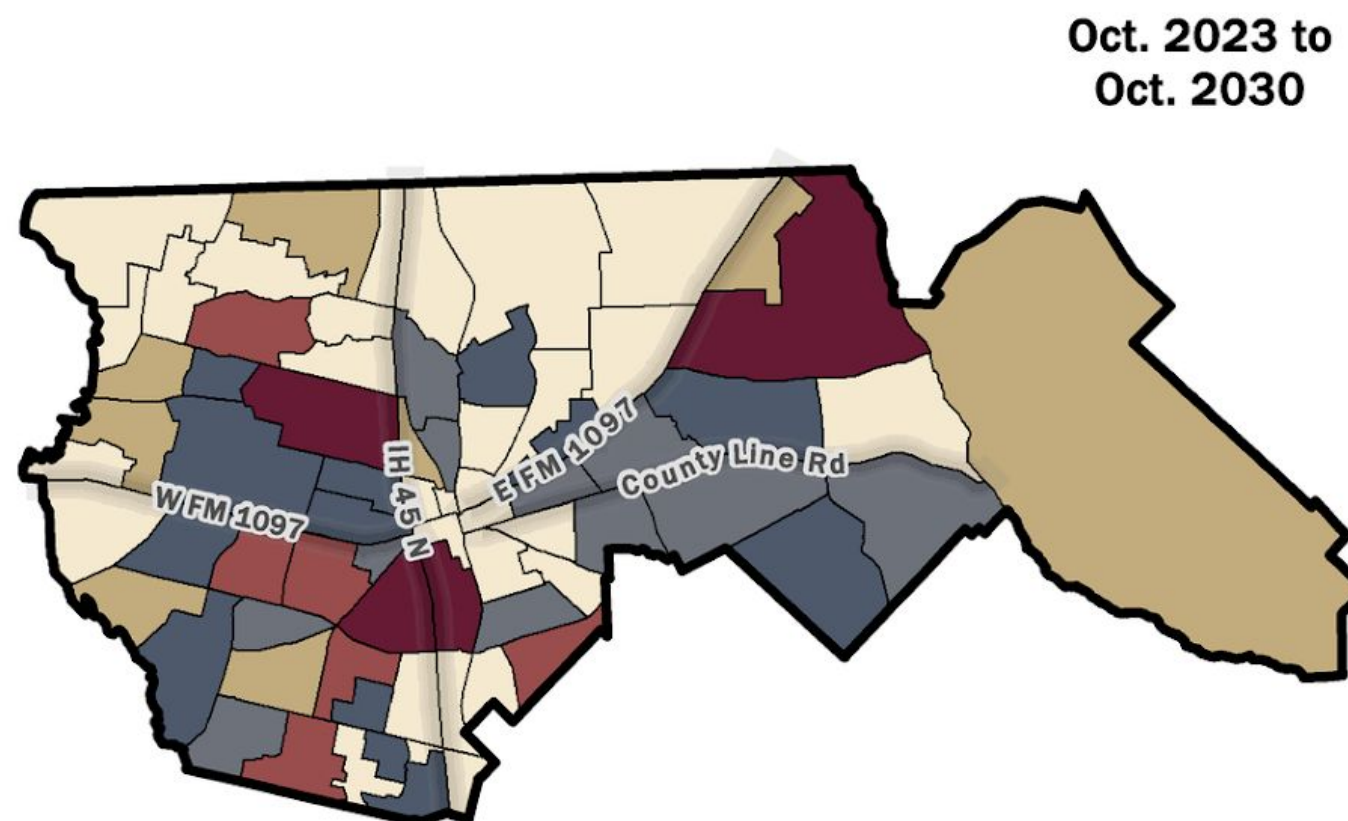
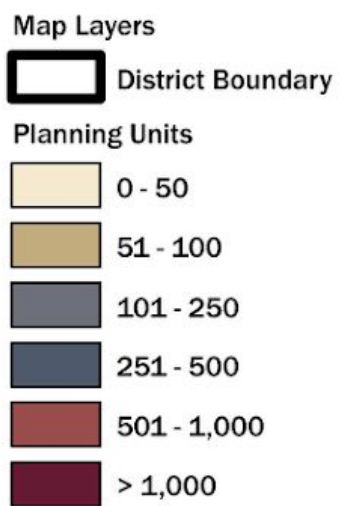
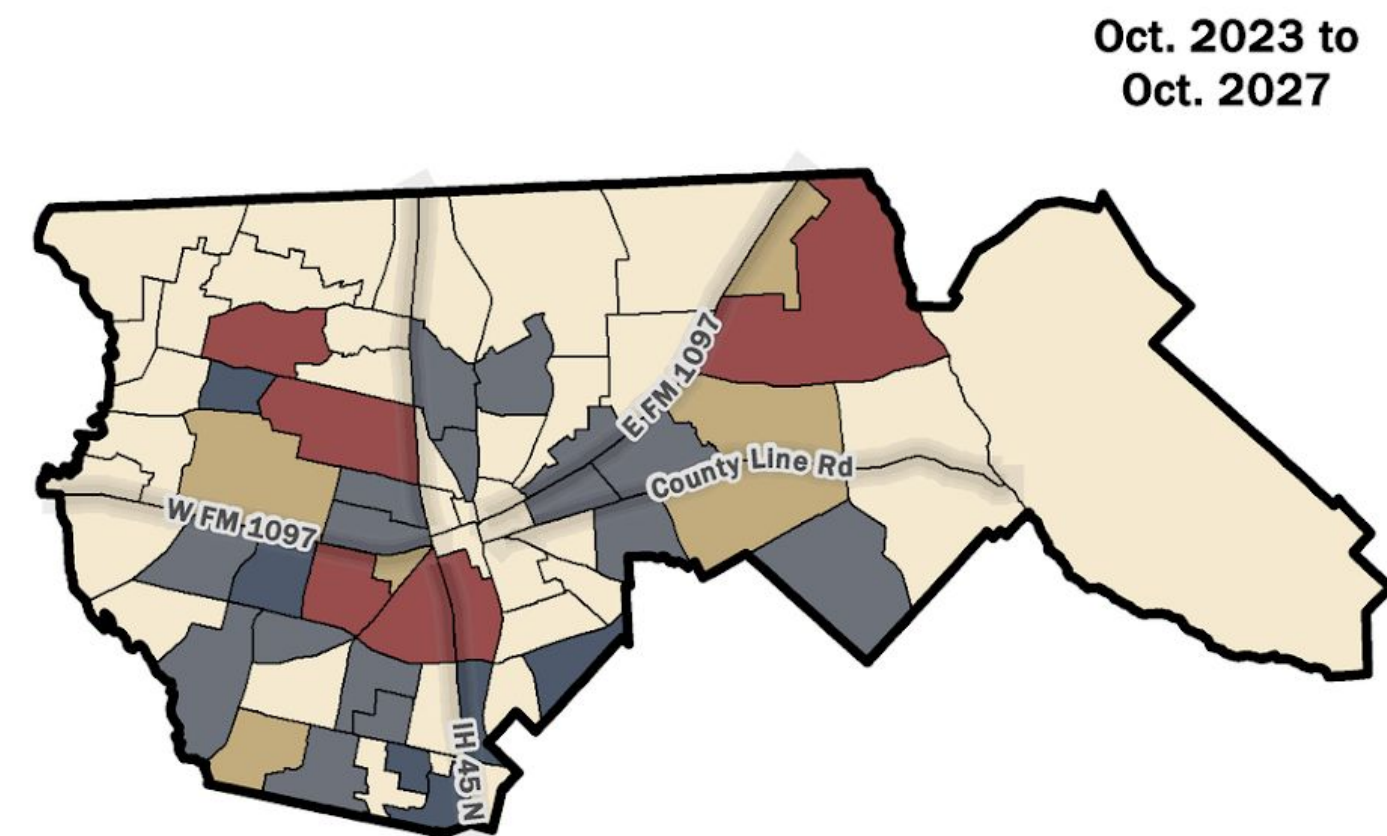
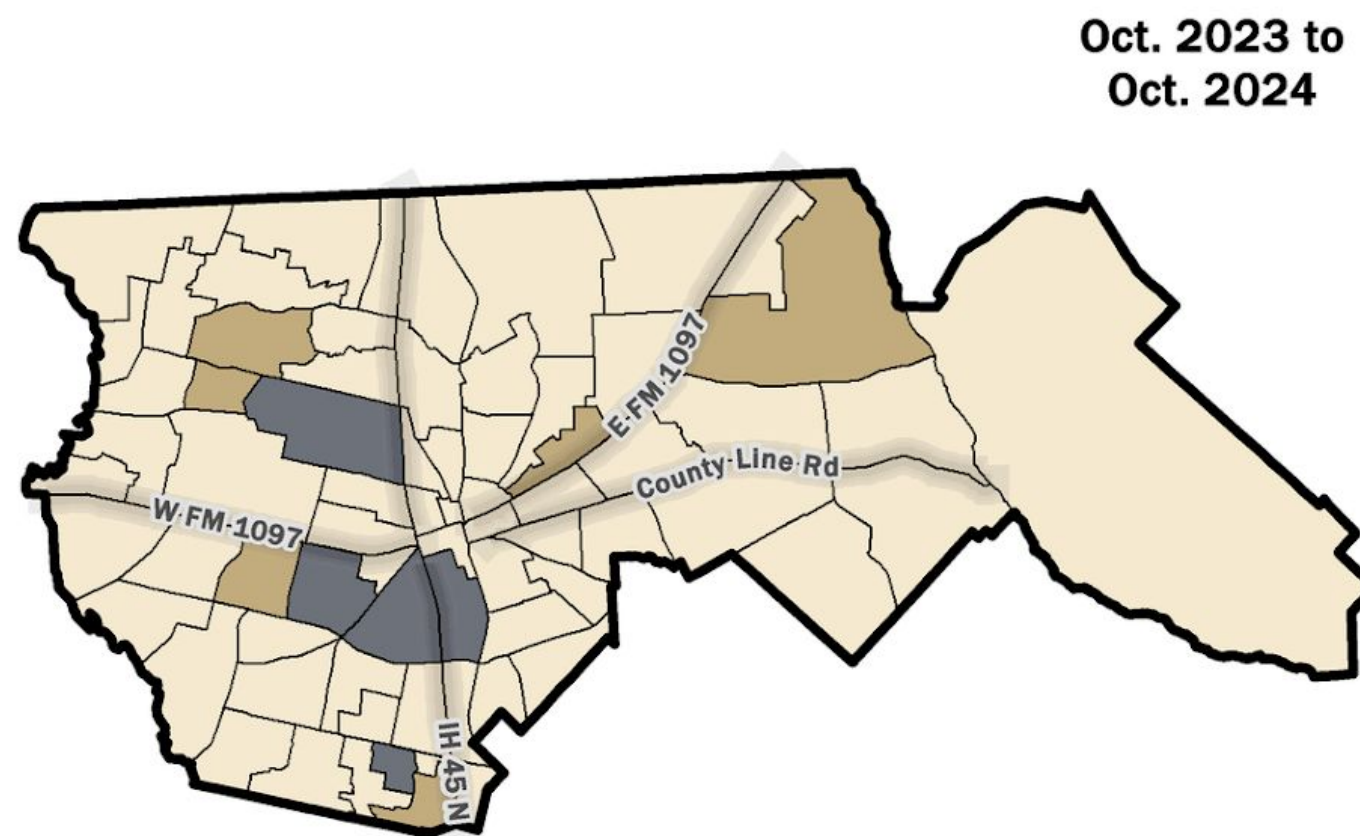
Conroe Ventures

MUD 216 is planned here and will serve 1,080 lots in both WISD and CISD; Conroe Venture LTD (Goodrich Family) has ~260 ac. in WISD (plus an additional ~218 ac. in CISD); ~600 lots could develop within WISD.



| | Development | Units Projected | Currently Occupied | Status |
|---|-----------------------|-----------------|--------------------|-------------|
| A | The Woodlands Hills | 3,441 | 1,042 | Developing |
| B | Republic Grand Ranch | 1,597 | 76 | Developing |
| C | Moran Ranch | 884 | 11 | Developing |
| D | Ridgeland Hills | 750 | 0 | Developing |
| E | Lexington Heights | 591 | 9 | Developing |
| F | Grace Landing | 400 | 0 | Developing |
| G | Conroe Ventures Tract | 600 | 0 | Coming Soon |
| H | Maxedon Tract | 465 | 0 | Coming Soon |
| I | Conroe 1484 Tract | 408 | 0 | Coming Soon |
| J | Calfee Tract | 400 | 0 | Coming Soon |

Projected New Single-Family Occupancies



Multi-Family and Build-to-Rent Communities

5,843

New multi-family
units projected
in ten years

19.3%

All new housing
projected to be
multi-family

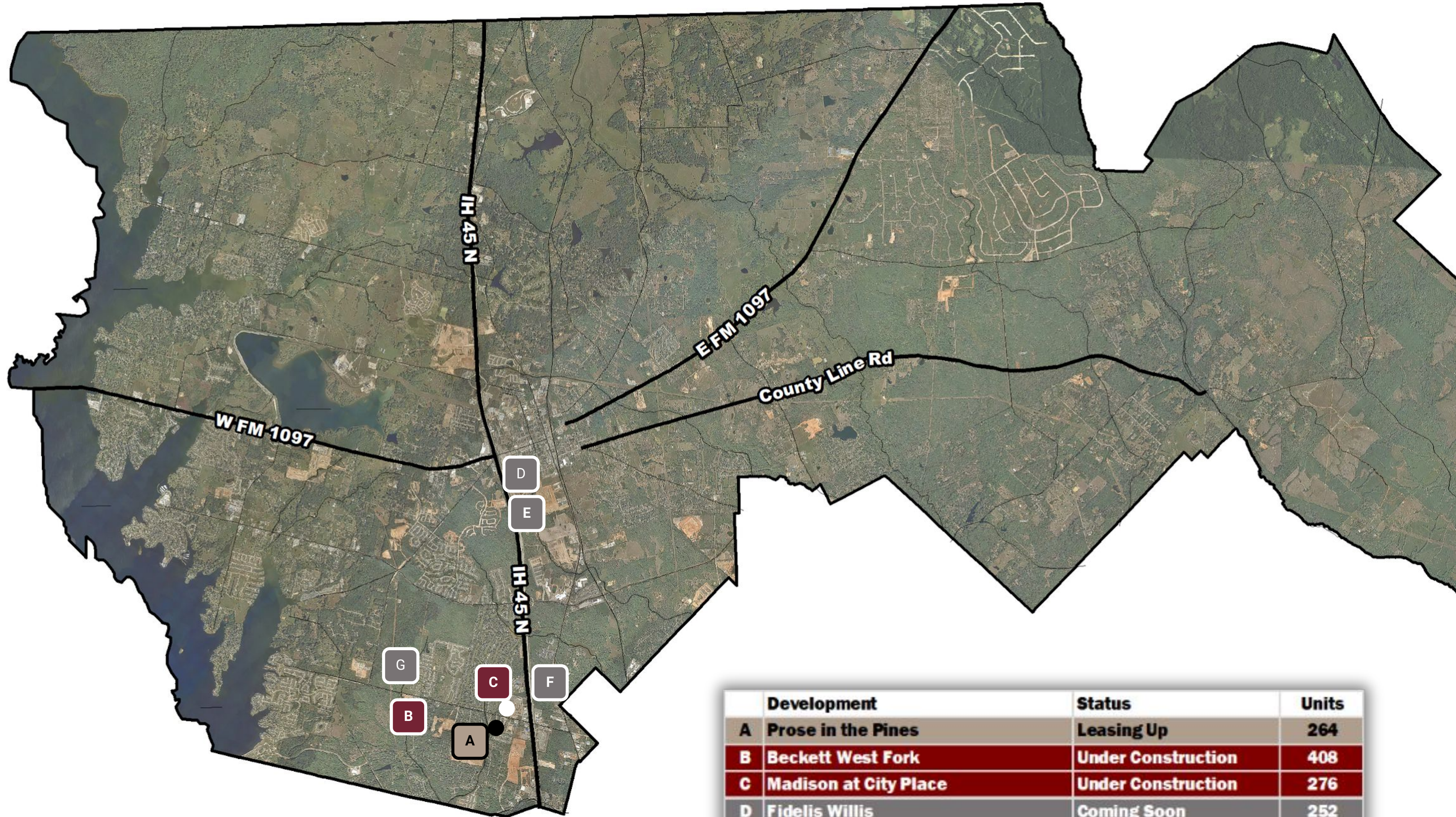
454

Projected BTR
units in first five
years

4.8%

of all new
single-family in
first five years is

BTR



| | Development | Status | Units |
|---|-----------------------------|--------------------|-------|
| A | Prose in the Pines | Leasing Up | 264 |
| B | Beckett West Fork | Under Construction | 408 |
| C | Madison at City Place | Under Construction | 276 |
| D | Fidelis Willis | Coming Soon | 252 |
| E | Moran Ranch MF I | Coming Soon | 205 |
| F | Preserve at Conroe - BTR | Coming Soon | 271 |
| G | Villas at League Line - BTR | Coming Soon | 183 |

Projected New Housing Occupancies

Nov 2023-Oct 2033

20,885

69.1% of Total
SINGLE-FAMILY

5,843

19.3% of Total
MULTI-FAMILY

2,103

7% of Total
AGE-RESTRICTED

30,240

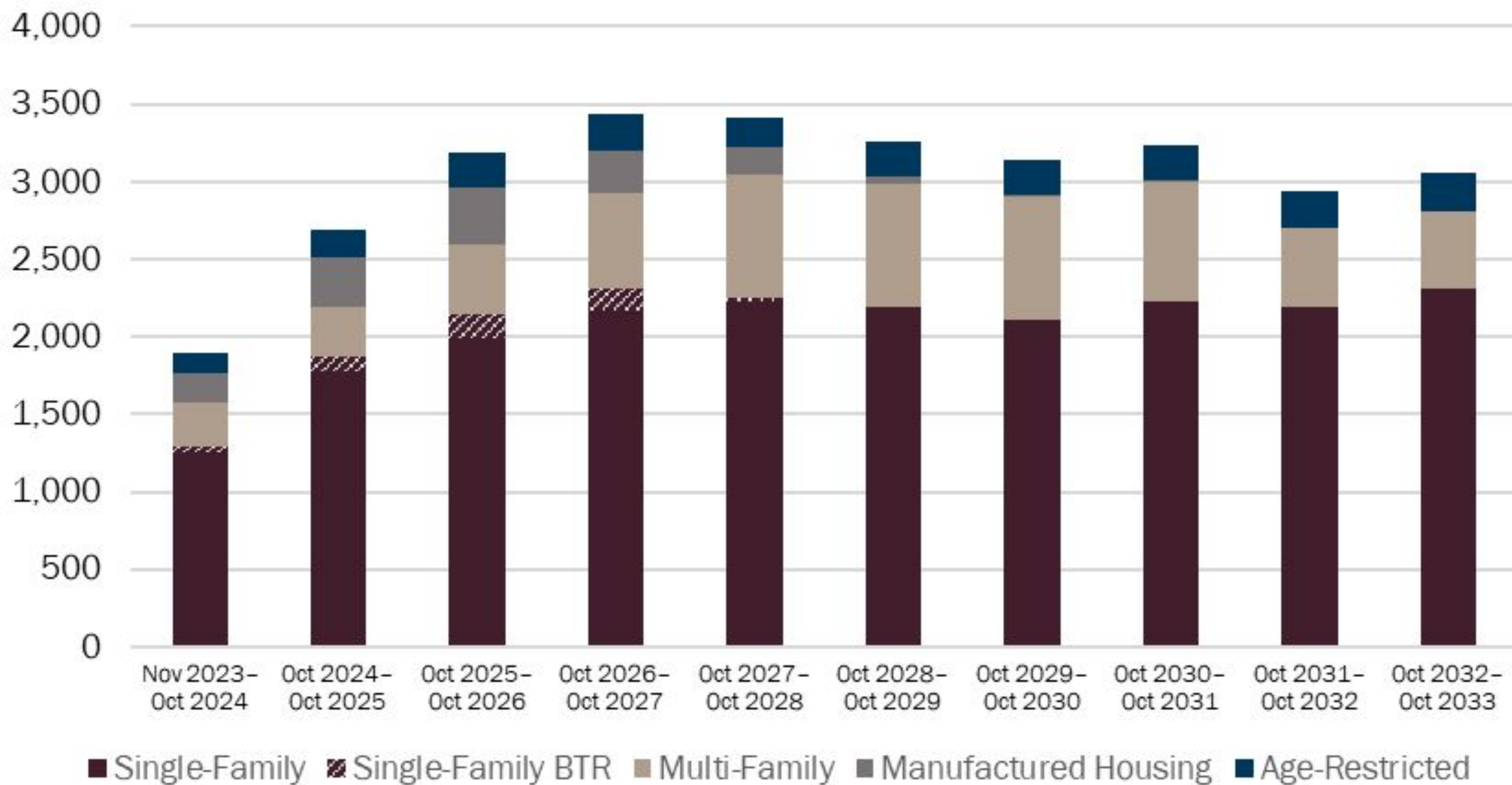
TOTAL PROJECTED
NEW OCCUPANCIES

1,409

4.7% of Total
MANUFACTURED



Housing Projections by Year of Occupancy





Demographic Study Components

1

**Demographic
Trends**

2

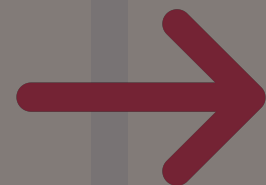
**Past and
Current
Students**

3

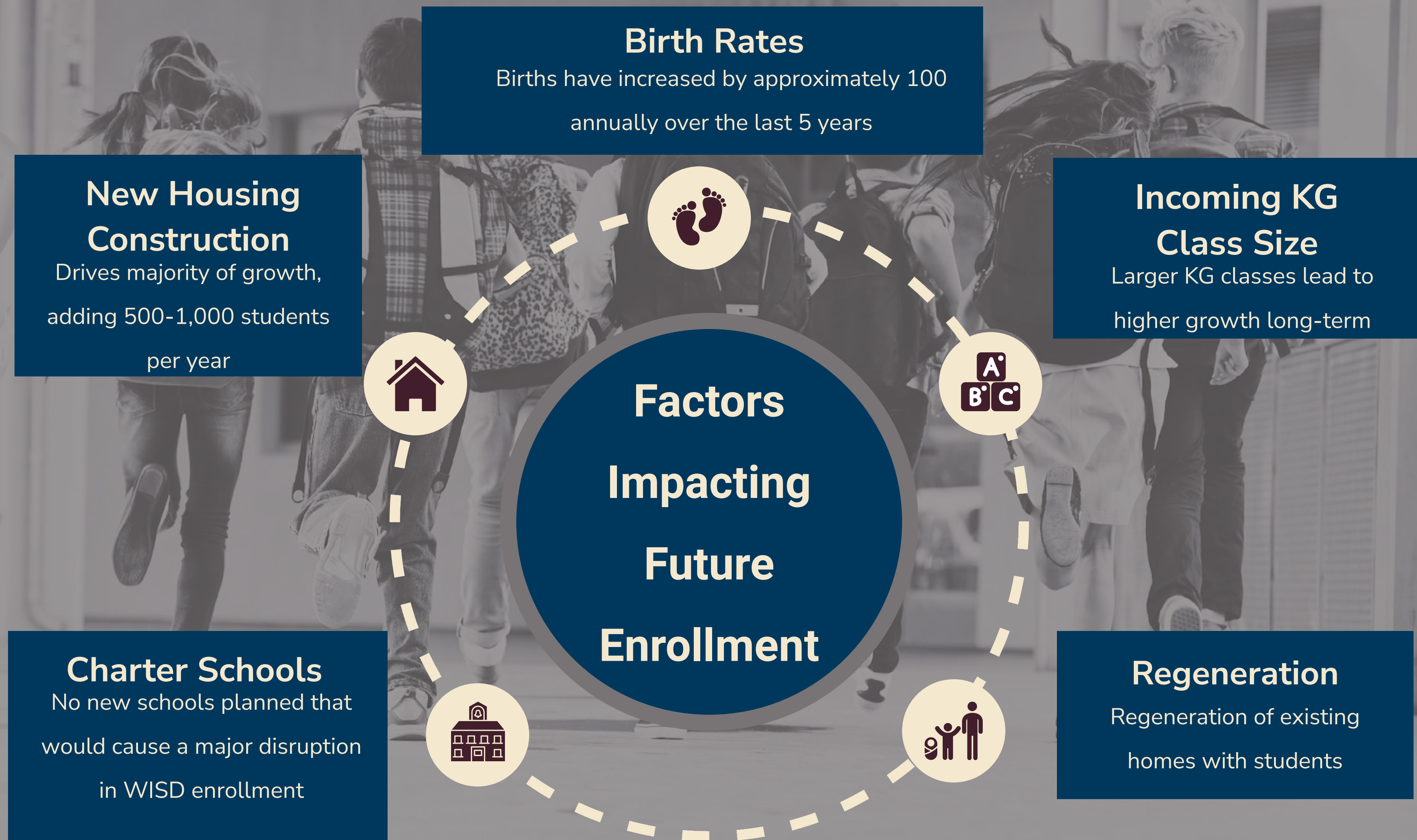
**Economy and
Housing**

4

**Student
Projections**



Student Projection Factors

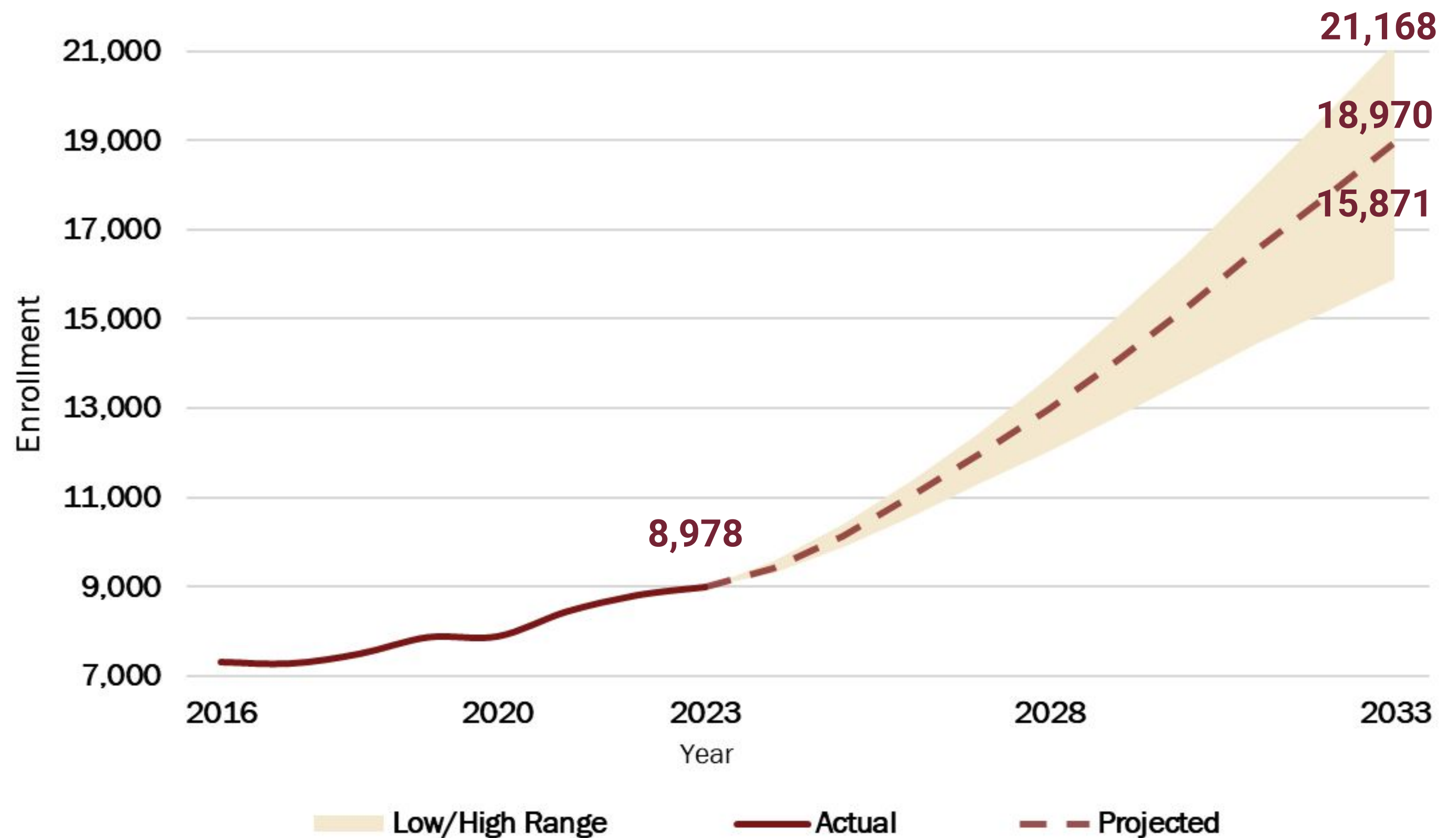


Three Scenarios of Growth

Every year starts with a clean slate -- not impacted by previous year's accuracy

Moderate Growth Scenario is "most likely" based on all the best information available at the time

Low and High Growth Scenarios are feasible, assuming changing circumstances



Three Scenarios of Growth

15,871

2033 Enrollment

Low Growth Assumptions

- Kindergarten enrollment remains under 1,000.
- Increasing interest rates.
- Additional private/charter school expansions within the next 3-6 years.

18,970

2033 Enrollment

Moderate Growth Assumptions

- Kindergarten classes begin to increase over the next five years; KG enrollment reaches 1,200 by 2033.
- Mortgage rates remain between 6.5 to 8% in the short-term.
- No new charter schools in the short-term.

21,168

2033 Enrollment

High Growth Assumptions

- Kindergarten enrollment reaches 1,400 by 2033.
- Mortgage rates decline below 5% in the next 2-4 years.
- A new development on the Dunwoody/Manners Tracts is announced and starts within the next 3-6 years.
- Accelerated regeneration in existing homes.

Residents Compared to Enrolled Students

Resident Students

PASA measures students where they live

- Geocoding by their address

2. Projecting new homes

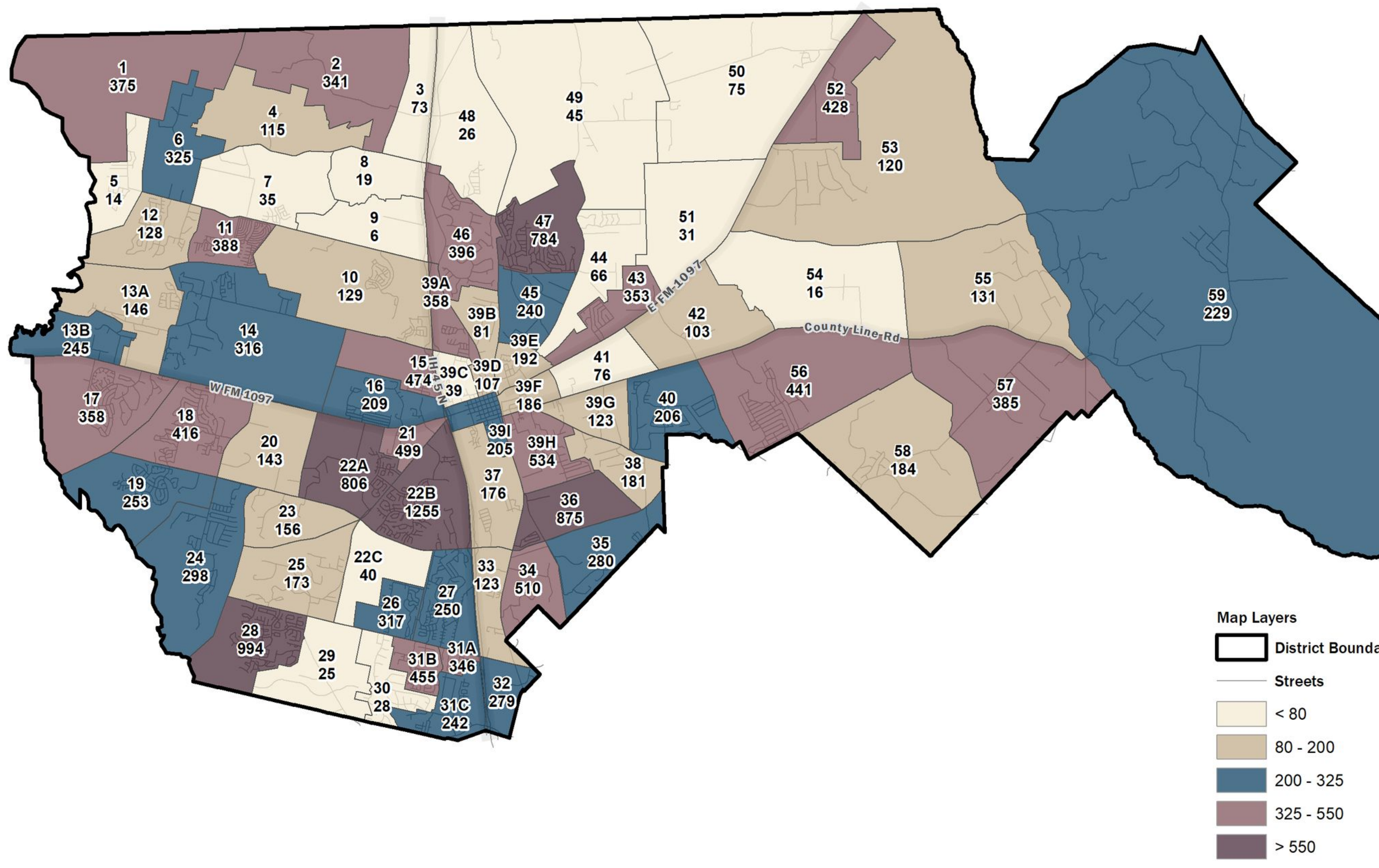


Enrolled Students

Transfers + Geocoded students = Enrolled students

Students transfer due to programs and many other reasons - attending a school other than their zoned school

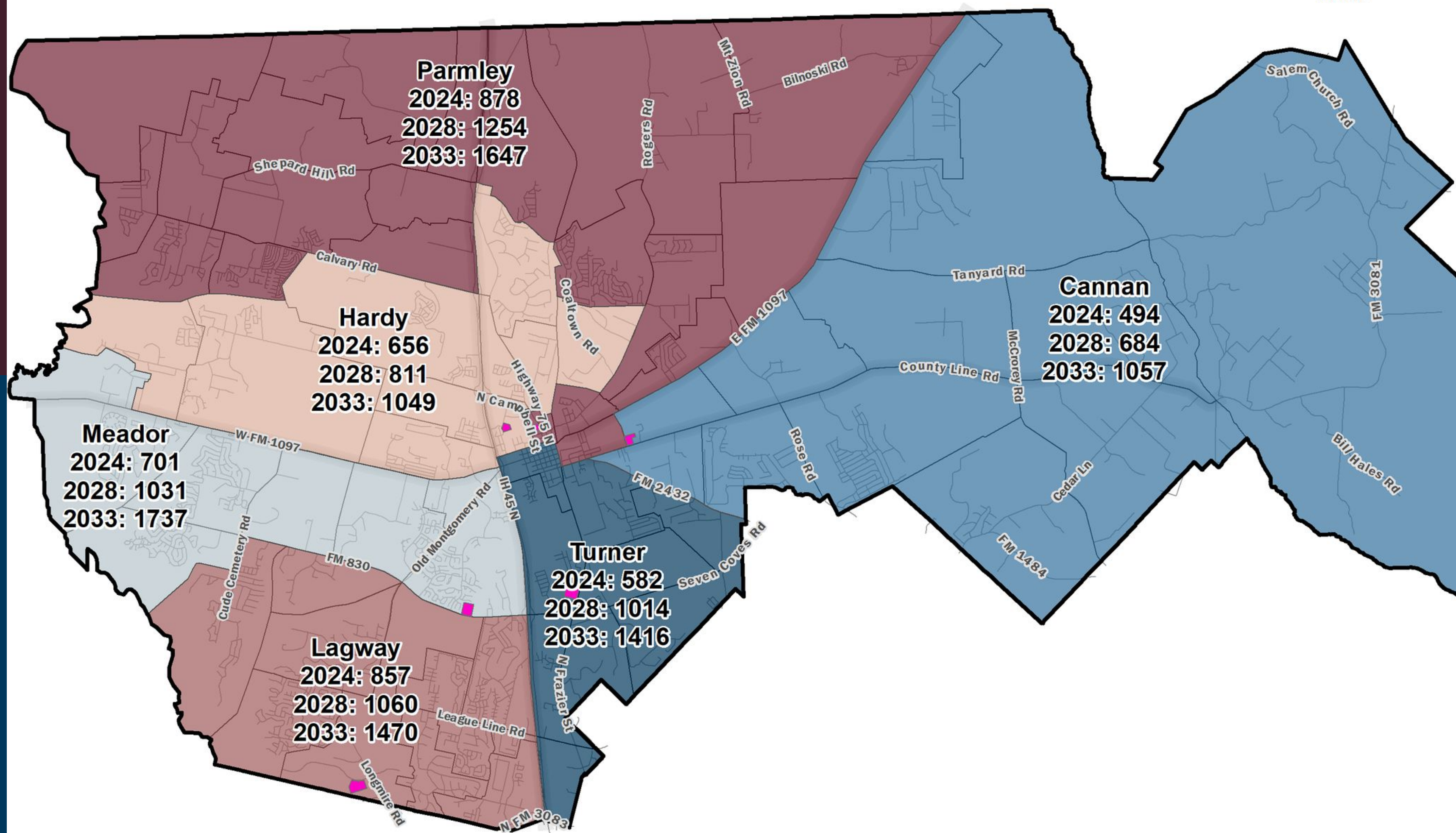




Total EE-12th Grade Students
Fall 2033

Map Layers

-  District Boundary
-  Streets



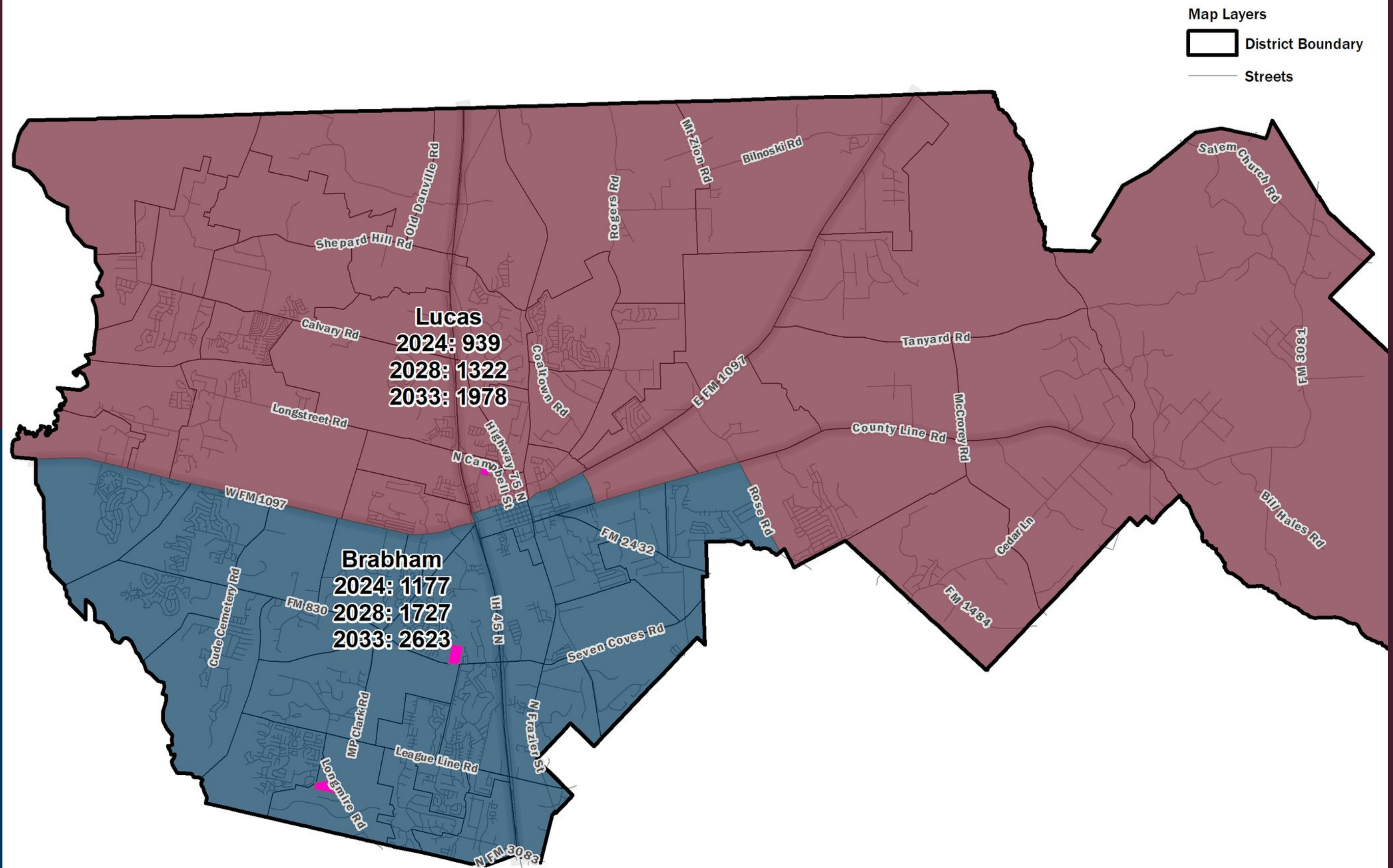
Total KG-5th Grade Students

Fall 2033

Projected Resident KG-5th Students

| | Capacity | 2020-21 | 2021-22 | 2022-23 | Current | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 | 2031-32 | 2032-33 | 2033-34 |
|--------------------|----------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Cannan | 700 | 452 | 444 | 454 | 464 | 494 | 516 | 585 | 620 | 684 | 760 | 846 | 932 | 994 | 1057 |
| Hardy | 866 | 562 | 579 | 616 | 649 | 656 | 696 | 729 | 764 | 811 | 866 | 919 | 965 | 1006 | 1049 |
| Lagway | 850 | 613 | 701 | 789 | 820 | 857 | 922 | 963 | 1021 | 1060 | 1128 | 1210 | 1292 | 1388 | 1470 |
| Meador | 800 | 516 | 546 | 605 | 657 | 701 | 764 | 817 | 904 | 1031 | 1166 | 1312 | 1459 | 1604 | 1737 |
| Parmley | 738 | 813 | 798 | 800 | 842 | 878 | 946 | 1043 | 1148 | 1254 | 1342 | 1440 | 1500 | 1575 | 1647 |
| Turner | 785 | 541 | 485 | 475 | 522 | 582 | 664 | 771 | 878 | 1014 | 1101 | 1171 | 1247 | 1328 | 1416 |
| Students Projected | 4,739 | 3,497 | 3,553 | 3,739 | 3,954 | 4,168 | 4,508 | 4,908 | 5,335 | 5,854 | 6,363 | 6,898 | 7,395 | 7,895 | 8,376 |





Total 6th-8th Grade Students
Fall 2033

Projected Resident Secondary Students

| | Capacity | 2020-21 | 2021-22 | 2022-23 | Current | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 | 2031-32 | 2032-33 | 2033-34 |
|-------------------------------------|----------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Brabham | 1,070 | 983 | 1032 | 1070 | 1118 | 1177 | 1341 | 1485 | 1645 | 1727 | 1807 | 1927 | 2168 | 2403 | 2623 |
| Lucas | 1,200 | 875 | 933 | 986 | 964 | 939 | 1031 | 1117 | 1230 | 1322 | 1440 | 1552 | 1714 | 1845 | 1978 |
| WHS + CTE | 3,000 | 2365 | 2510 | 2534 | 2655 | 2793 | 2890 | 3114 | 3334 | 3608 | 3956 | 4340 | 4665 | 4940 | 5293 |
| Secondary Students Projected | 5,270 | 4,223 | 4,475 | 4,590 | 4,737 | 4,909 | 5,262 | 5,716 | 6,209 | 6,657 | 7,203 | 7,819 | 8,547 | 9,188 | 9,894 |

Questions?



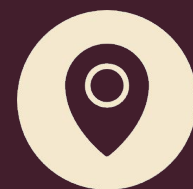
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