



Population &
Survey Analysts
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Boerne ISD Demographic Study Spring 2024



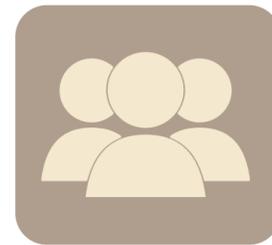
PASA'S APPROACH



**Collect
Background
Data**



**Study Housing
and Economic
Data**



**Study Past and
Current
Student
Population**



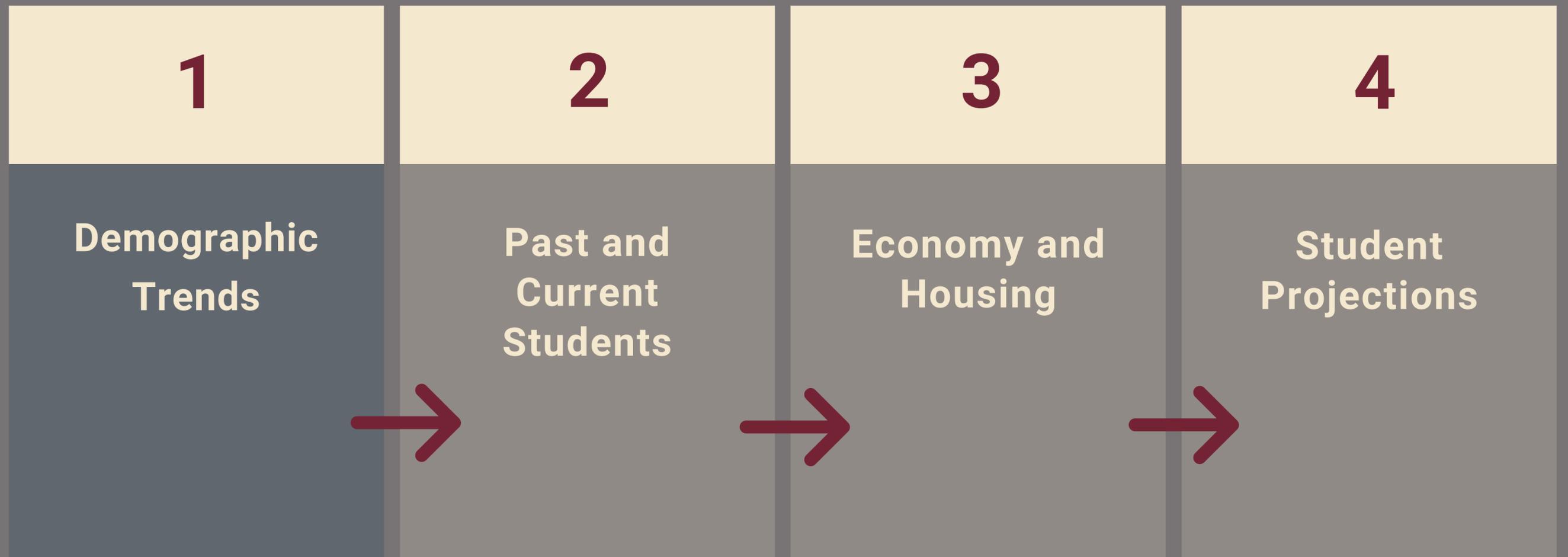
**Generate
Projections**



**Analyze Long
Range
Implications for
Facilities**

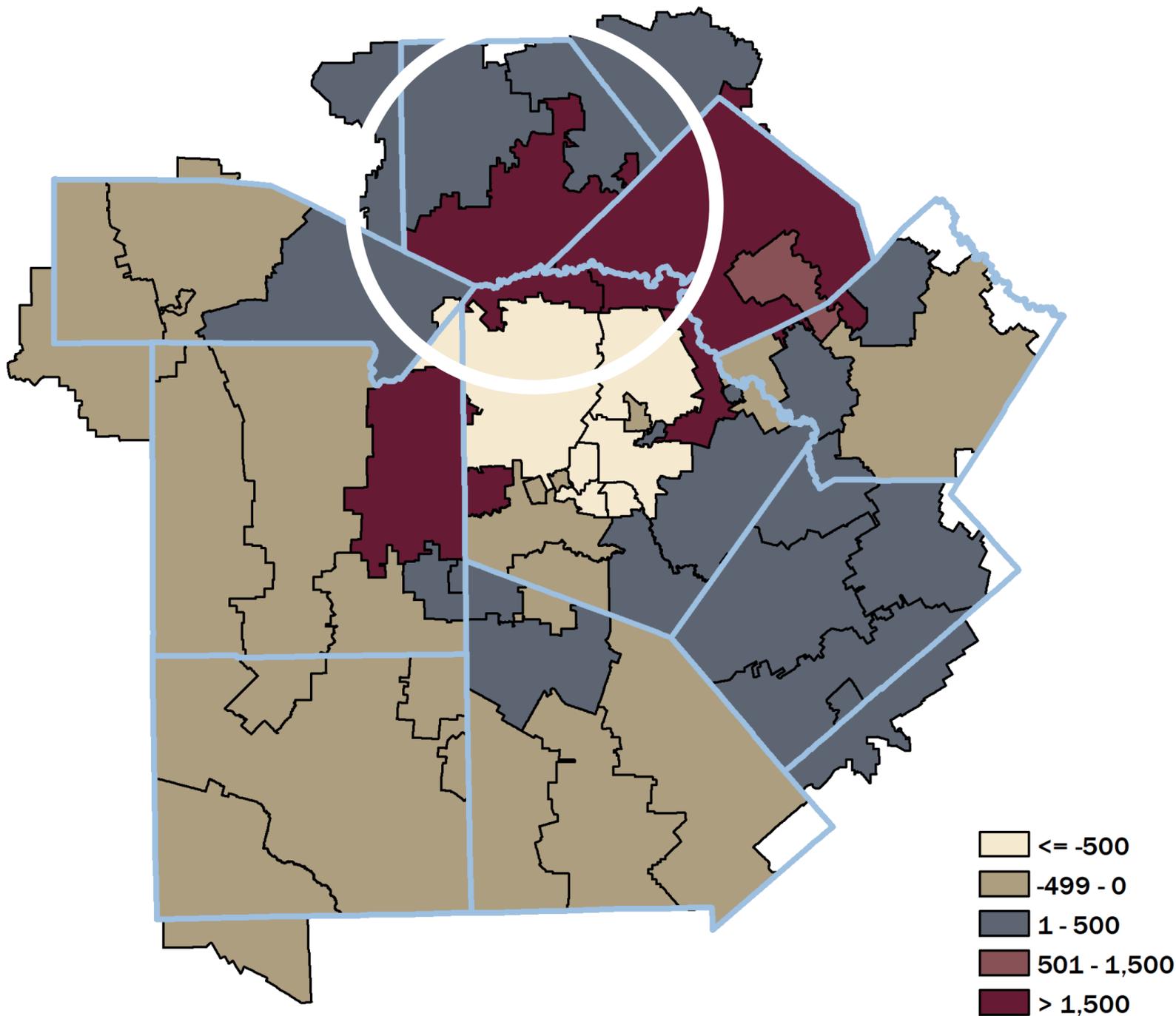


Demographic Study Components



5- Year Numerical Change in Enrollment

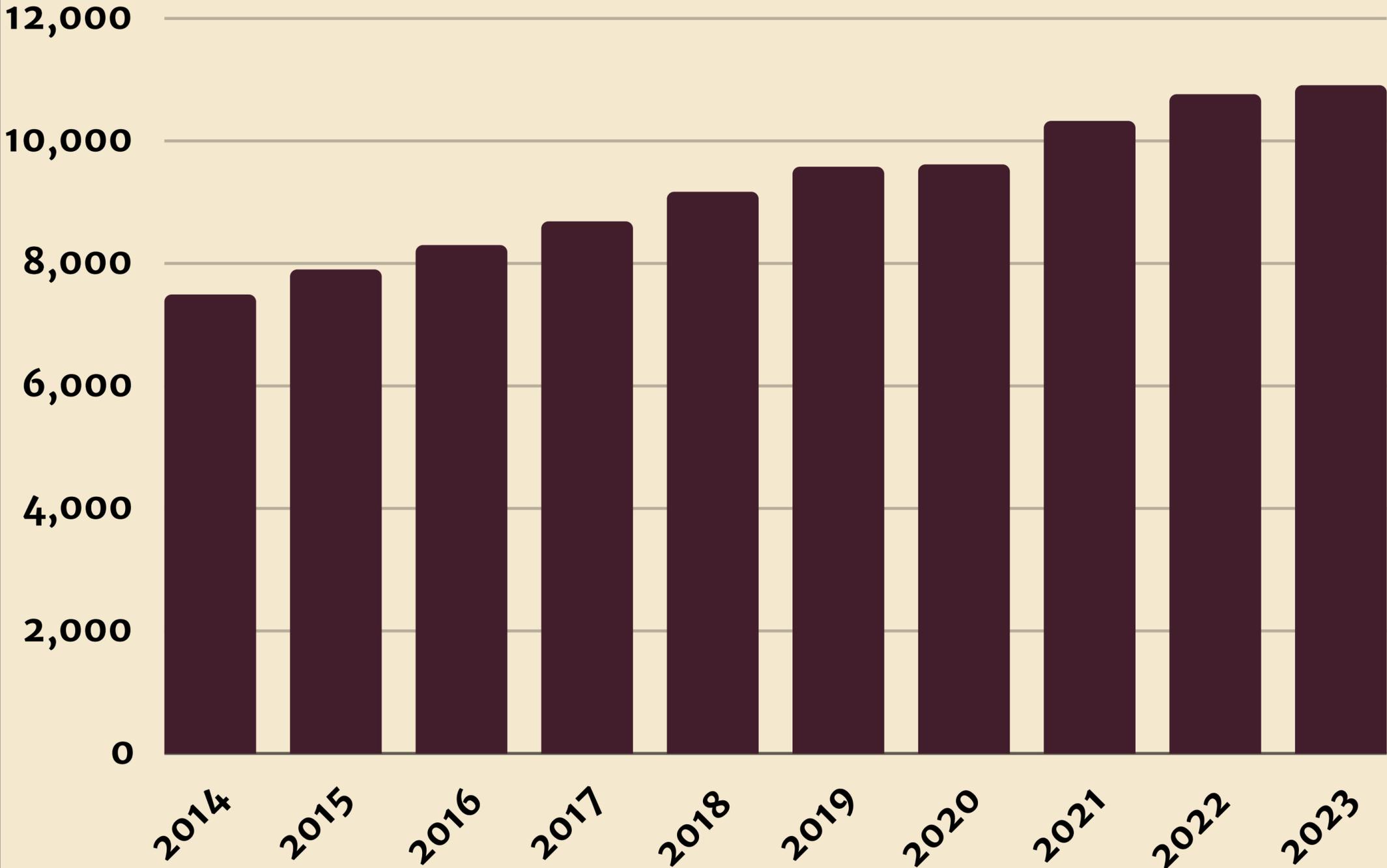
Fall 2017 - Fall 2022



	District	Change
1	Comal ISD	5,406
2	Karnes City ISD	3,701
3	Judson ISD	2,753
4	Medina Valley ISD	2,735
5	Boerne ISD	2,076
6	New Braunfels ISD	795
7	East Central ISD	402
8	Southside ISD	311
9	Navarro ISD	269
10	La Vernia ISD	140
11	Lytle ISD	112
12	Poteet ISD	101
13	Poth ISD	100
14	Bandera ISD	98
15	Falls City ISD	82

Source: Texas Education Agency (TEA)

Past Enrollment Change



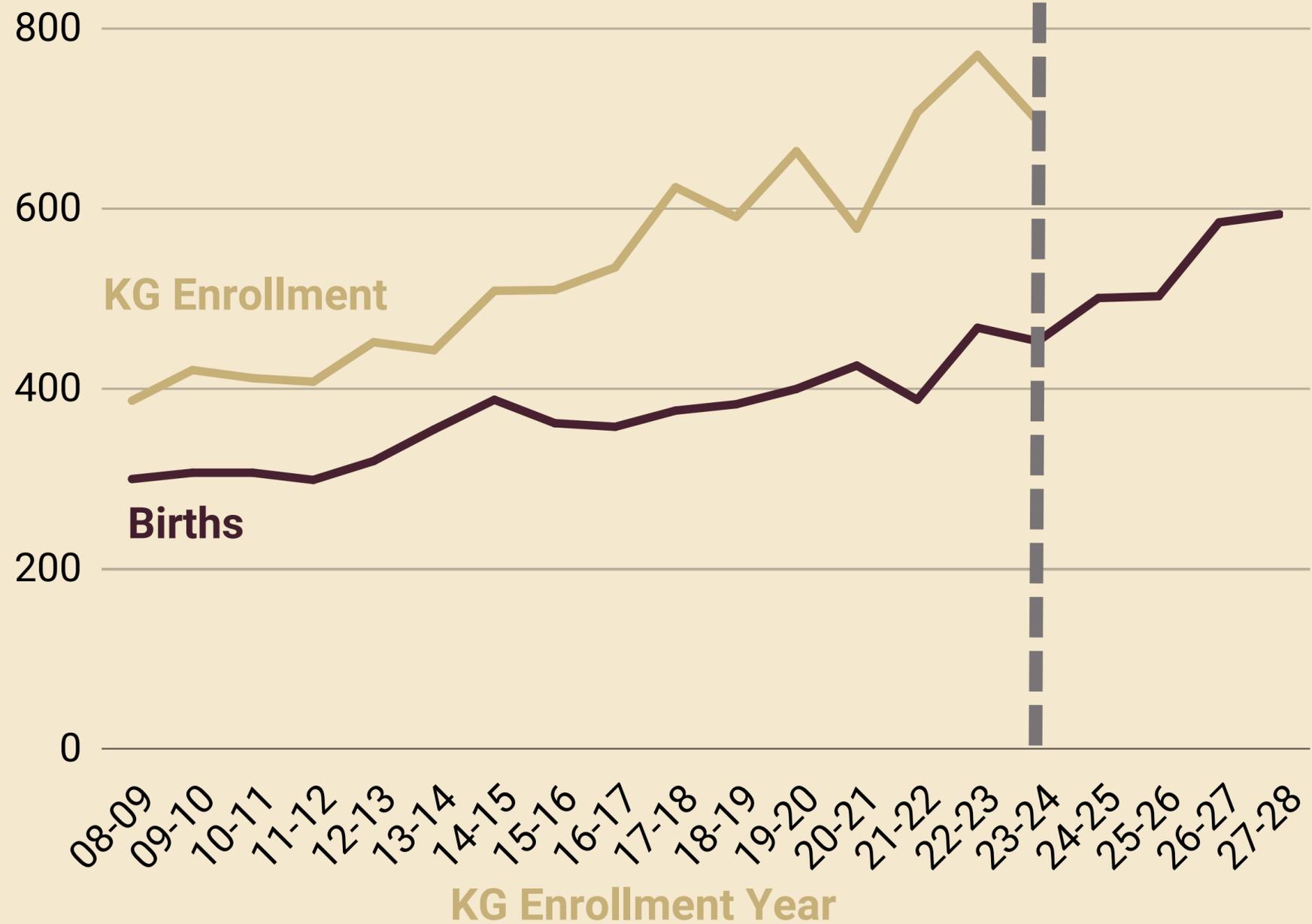
10,910

October 27, 2023
Enrollment

Source: Texas Education Agency (TEA)



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

1

**Demographic
Trends**

2

**Past and
Current
Students**

3

**Economy and
Housing**

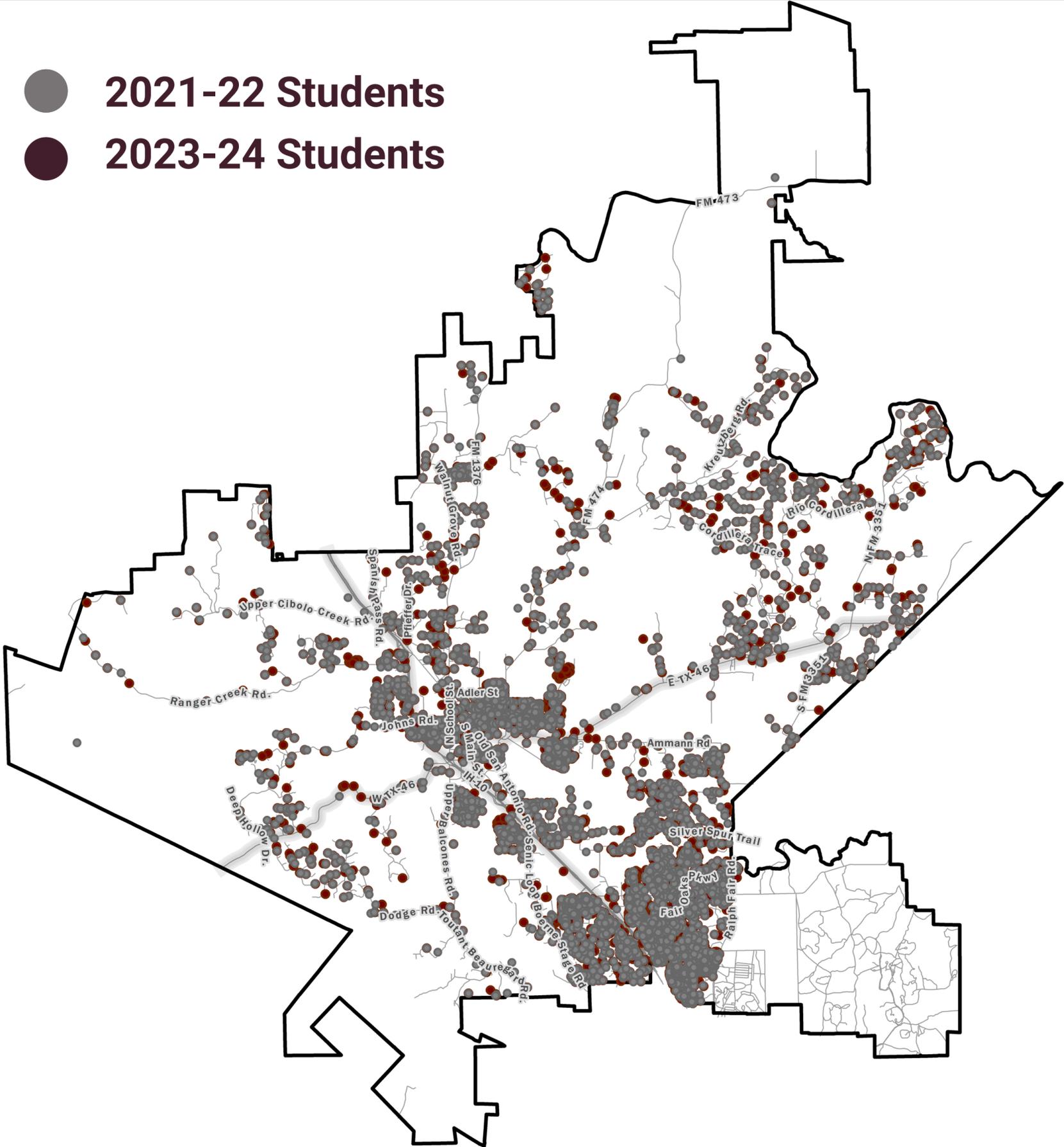
4

**Student
Projections**



Student Geocode

- 2021-22 Students
- 2023-24 Students



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

Maroon areas highlight new students that didn't exist in 2021-22

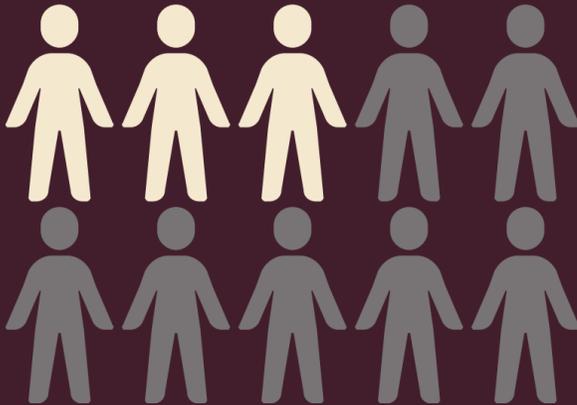
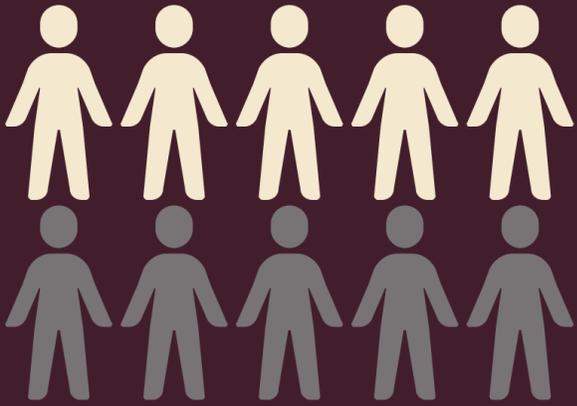
Students Per Home

Single-Family

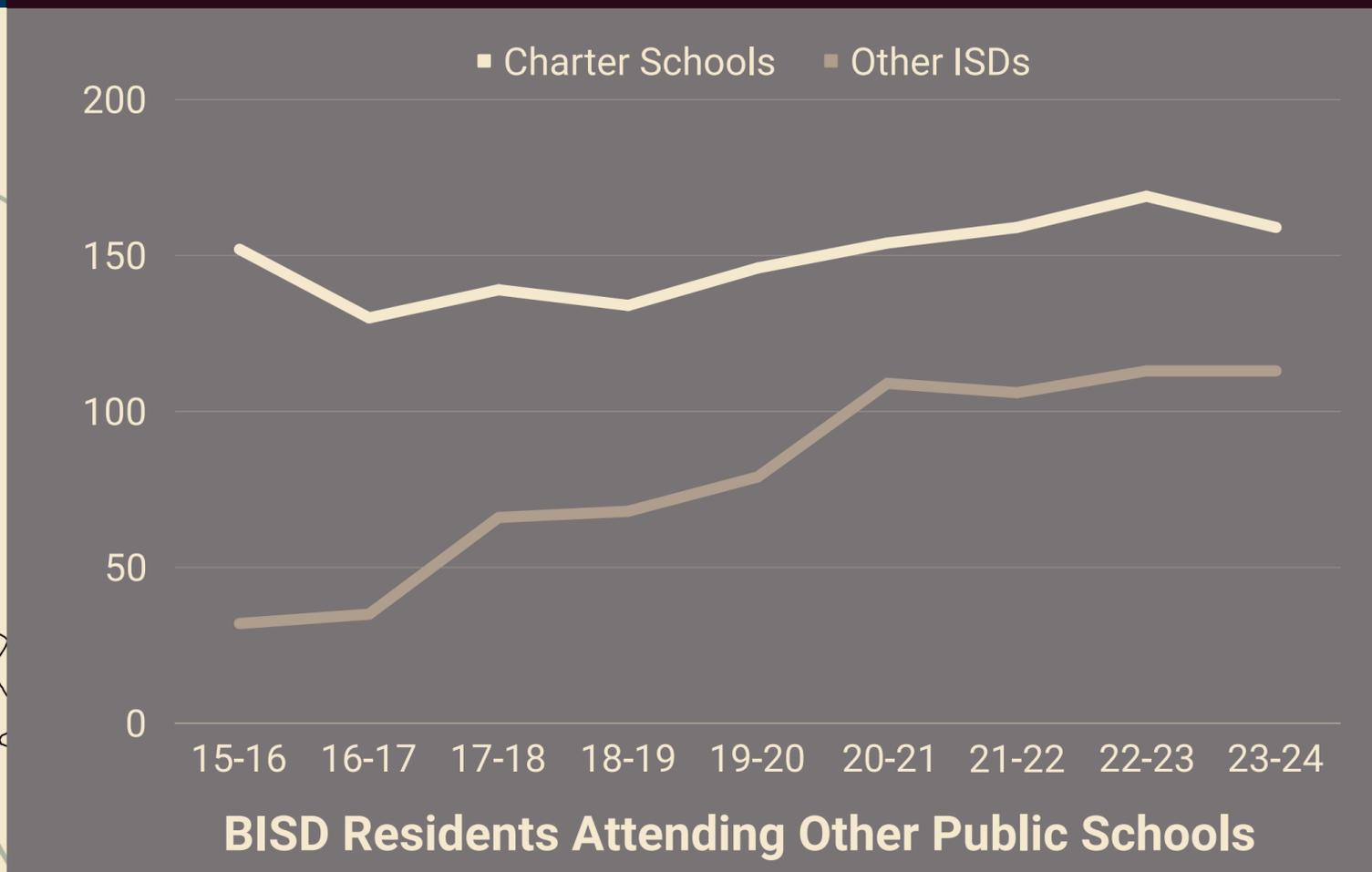
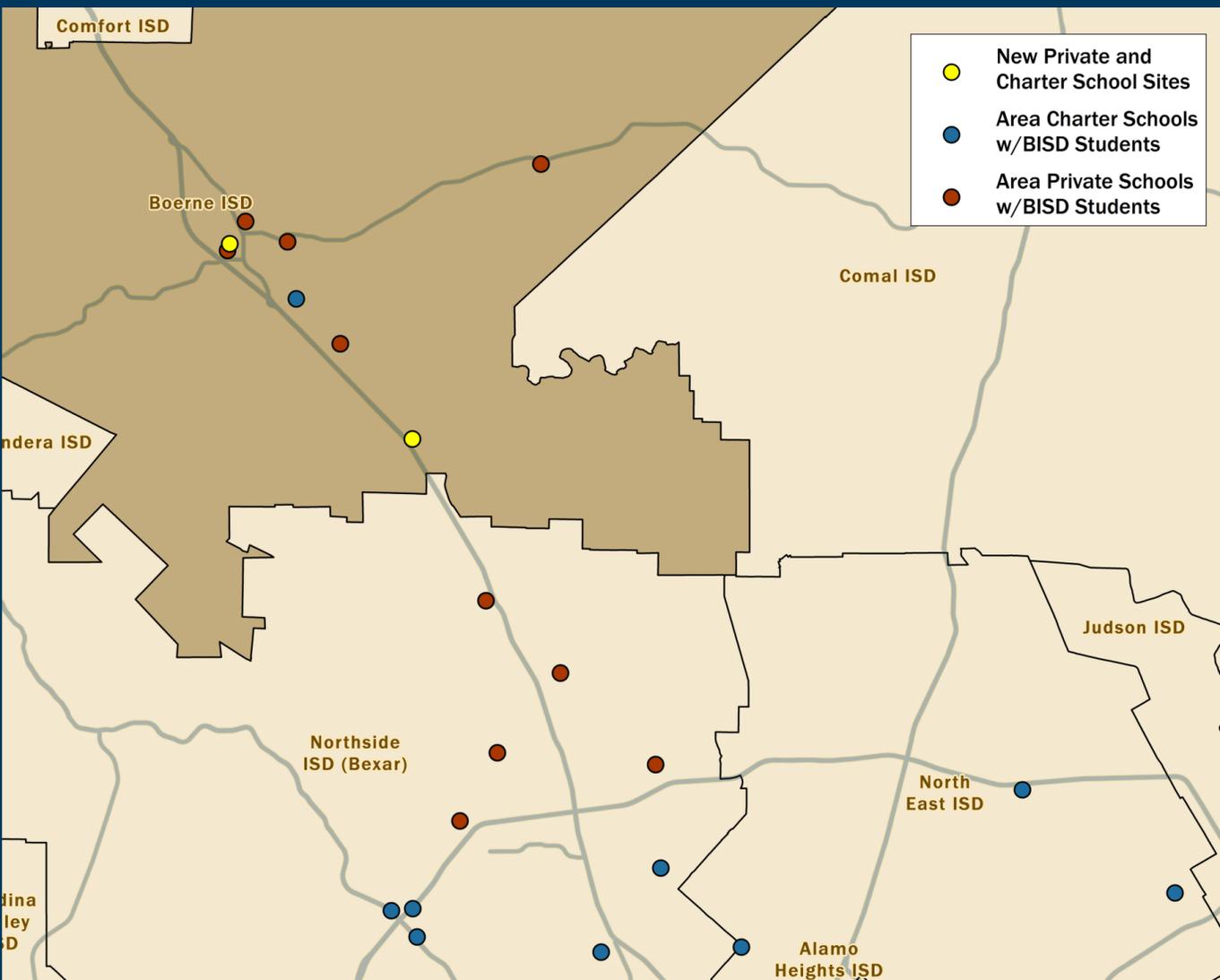
Multi-Family

0.47

0.27



Private and Charter Schools



88.2% Reside in and Attend BISD

1.4% Attend Charter Schools

9.5% Attend Private Schools

Currently, TEA does not provide data regarding Homeschooling.

Saint Peters Apostle Catholic School is planning to open a PK-5 campus in 2025-26, later expanding to PK-8. Church officials expect to pull much of its 400-600 students from Boerne ISD.

Although there are numerous charter schools in the Northwestern portion of the San Antonio area, charter schools do not significantly impact Boerne ISD in terms of resident student transfers.



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Economic and Housing Highlights

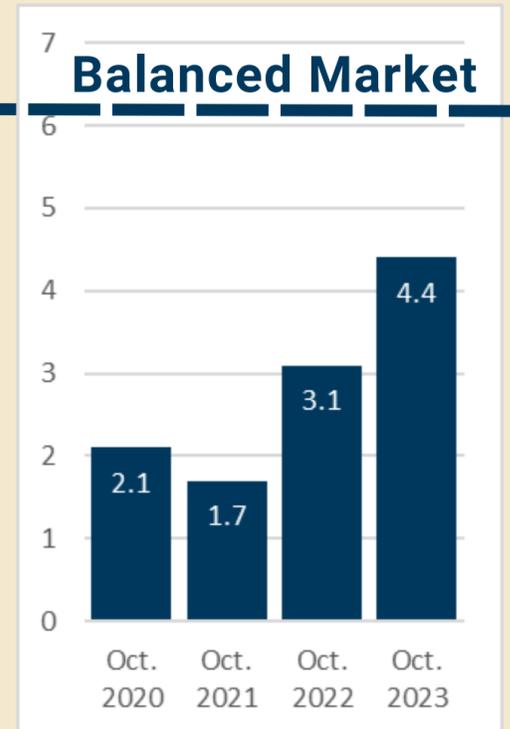


Robust in 2020 and 2021



Cooling since 2022

Months Inventory
San Antonio
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

Developments with Largest 10-year Single-Family Projections

**1,418
units**

Esperanza

Spanning 1,600+ acres with approximately 3,400 homes at build-out, this development on TX-46 will continue to impact BISD greatly beyond the next decade. Toll Brothers is currently developing the age-restricted (55+ section) which is planned for over 500 lots.

**1,144
units**

Corley Farms

Pulte and Centex are building in the initial phase west of Boerne Stage Road. The development will consist of 1,165 homes.

**795
units**

Cordillera Ranch

Homesite development continues in all sections of the development. The Springs, east of FM 3351, is planned for approximately 965 homesites; a new 380-acre section in PU 70 off Clubs Drive is planned for approximately 150 homes.

**594
units**

Ranches at Creekside

Sitterle Homes is building here. Platting slowed in 2021 and 2022 due to engineering issues but has picked up in the last half of 2023. The pace of development will in turn increase.

**585
units**

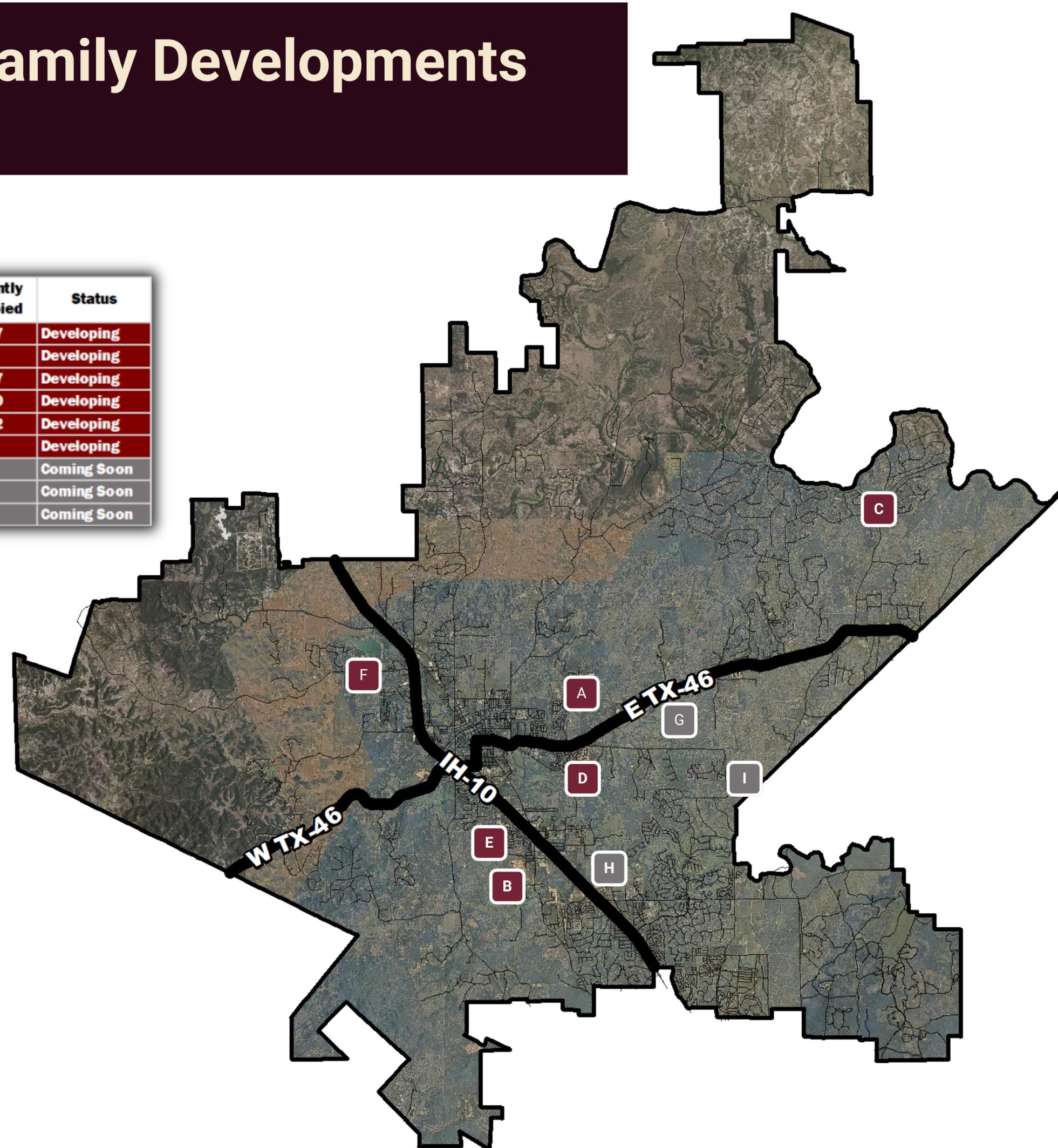
George's Ranch

Utilities are now being installed from CoB to the site; Phase 1 has been platted for 134 lots with Kendall Co.; Lookout Group is planning to have the first lots ready for builders in Fall 2024.

Largest Single-Family Developments

10-Year

	Development	Units Projected	Currently Occupied	Status
A	Esperanza	1,418	507	Developing
B	Corley Farms	1,144	0	Developing
C	Cordillera Ranch	795	967	Developing
D	Ranches at Creekside	594	280	Developing
E	Regent Park	490	412	Developing
F	Shoreline Park	301	59	Developing
G	George's Ranch	585	0	Coming Soon
H	Lily Ranch	450	0	Coming Soon
I	Fair Oaks Meadows	335	0	Coming Soon



Multi-Family and Build-to-Rent Communities

4,811

New multi-family
units projected
in ten years

25.3%

All new housing
projected to be
multi-family

214

Projected BTR
units in first five
years

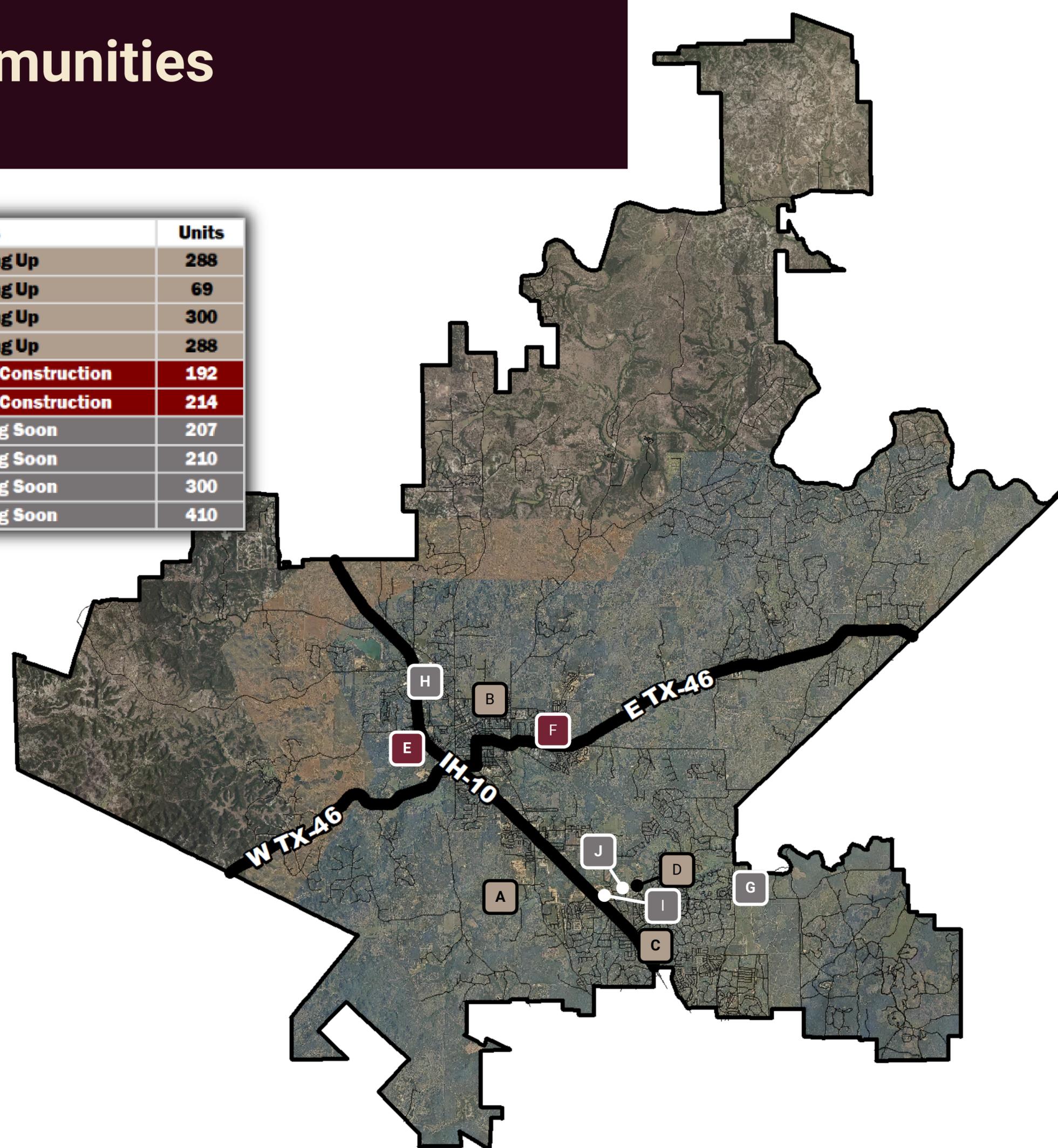
1.6%

of all new single-
family in first five
years is BTR

New Rental Communities

Short-Term Focus

	Development	Status	Units
A	Estraya Boerne	Leasing Up	288
B	Garden Creek	Leasing Up	69
C	Napa Oaks	Leasing Up	300
D	Vantage at Fair Oaks	Leasing Up	288
E	Bluff View	Under Construction	192
F	Collection at Boerne BTR	Under Construction	214
G	Botanica Fair Oaks - 55+	Coming Soon	207
H	Future MF	Coming Soon	210
I	Lemon Creek MF	Coming Soon	300
J	Lux at Lemon Creek	Coming Soon	410



Projected New Housing Occupancies

Oct 2023-Oct 2033

13,051

68.5% of Total

SINGLE-FAMILY

4,811

25.3% of Total

MULTI-FAMILY

966

5.1% of Total

AGE-RESTRICTED

19,042

TOTAL PROJECTED
NEW OCCUPANCIES

214

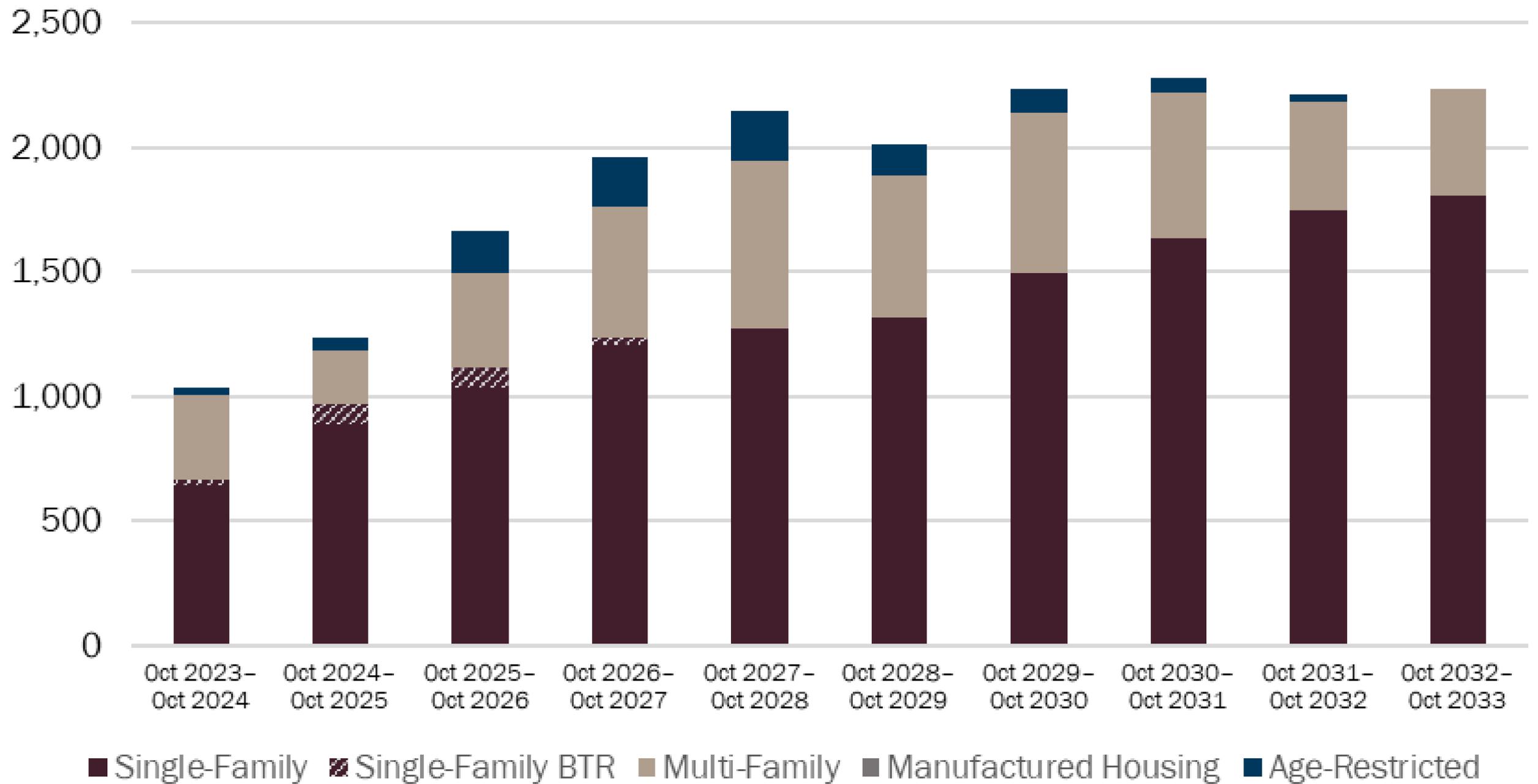
1.1% of Total

SF BUILD-TO-RENT

Projected New Housing Occupancies

Oct 2023-Oct 2033

Housing Projections by Year of Occupancy





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Projections**



Student Projection Factors

Birth Rates

Births continue to rise as young adult population increases due to new housing options

New Housing Construction

Drives majority of growth, adding 350-500 students per year in first two years

Incoming KG Class Size

This year's KG class is smaller than last year's KG; this will have a cumulative dampening effect on future enrollment

Private Schools

Three new private schools planned in or near BISD. All planned to enroll students in 2024 or 2025.

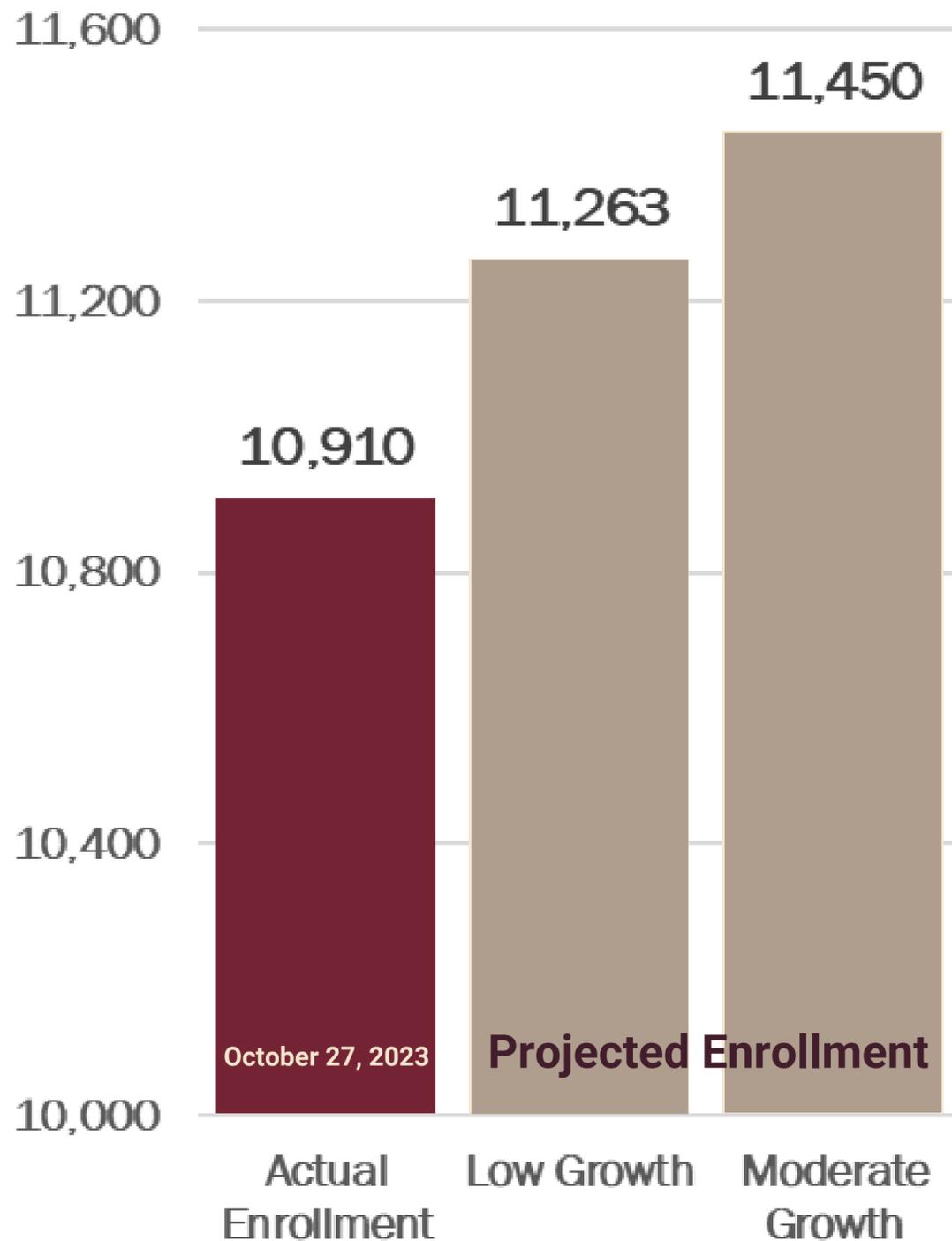
Aging of Existing Student Population

Some established neighborhoods have declining school enrollments.

Factors Impacting Future Enrollment

Comparison to Projections

Projections vs. 23-24 Actual Enrollment



What Changed?



KG Enrollment

- Kindergarten enrollment decreased by over 9% in 2023-24.



Housing

- Mortgage rates have doubled since the last study
- Ranches at Creekside slowed due to unforeseen issues with the engineering team, Miralomas also slowed down, and Corley Farms did not start as quickly as projected



Private Schools

- Three private school expansions are expected to be completed by 2025.

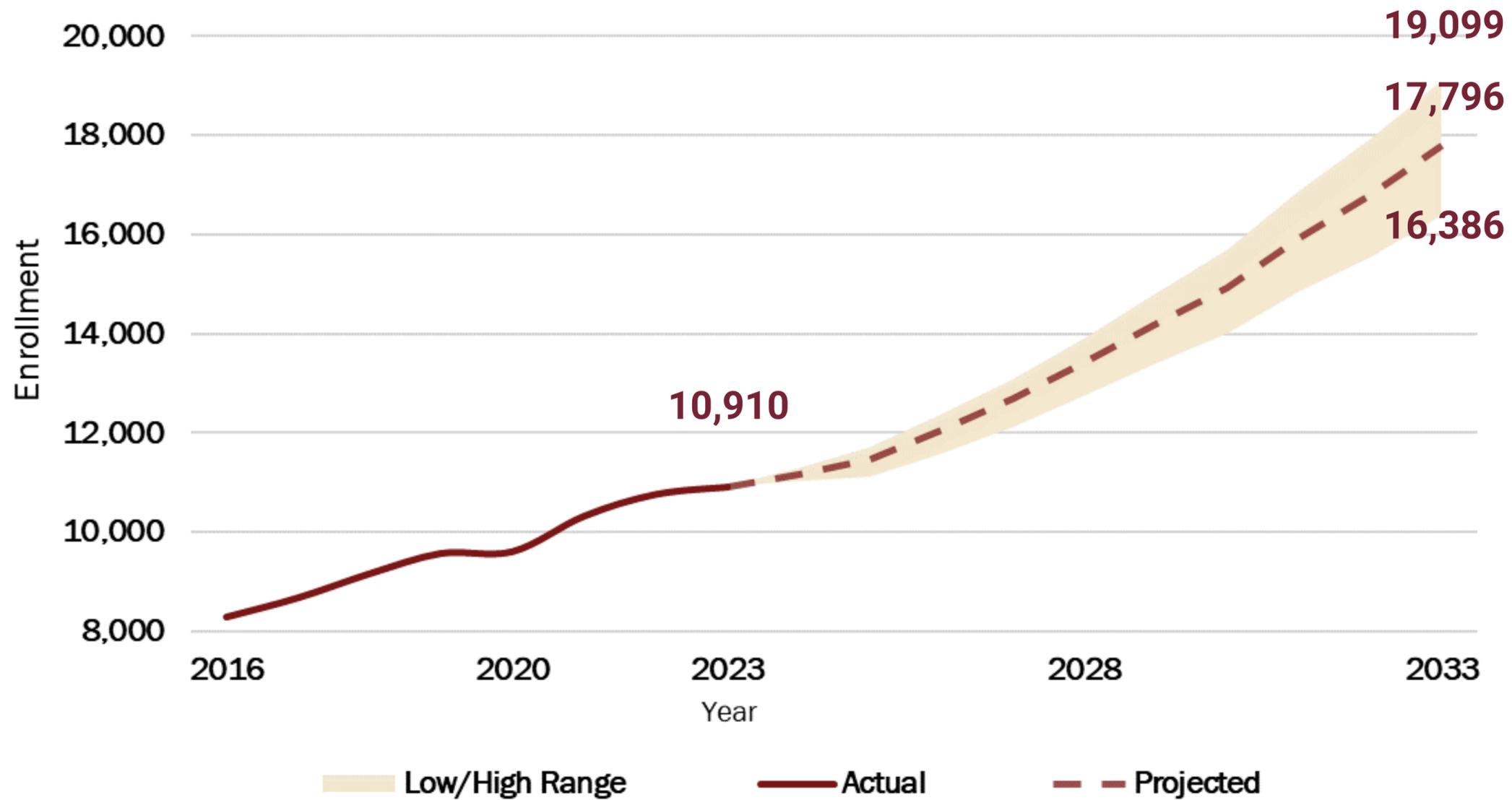
Source: PASA 2022-23 Demographic Study

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

16,386

2033 Enrollment

Low Growth Assumptions

- Kindergarten enrollment reaches 1,000 by 2032
- Increasing interest rates
- Additional private/charter school expansions within the next 3-6 years

17,796

2033 Enrollment

Moderate Growth Assumptions

- Kindergarten enrollment reaches 1,150 by 2033
- Mortgage rates stabilize
- St. Peter Catholic School opens in 2025

19,099

2033 Enrollment

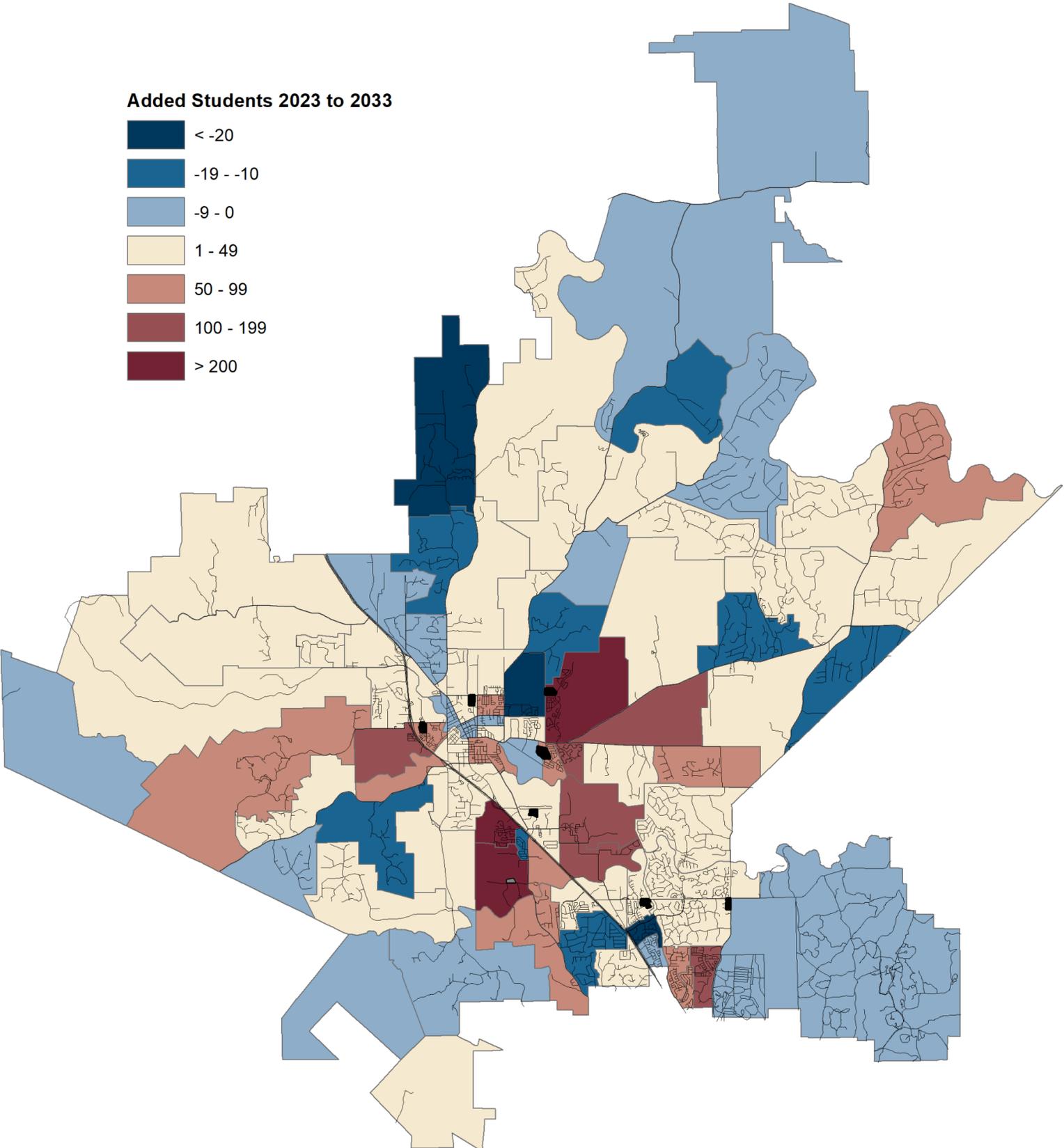
High Growth Assumptions

- Mortgage rates decline below 5% in the next 2-4 years
- No additional private/charter school expansions
- Accelerated regeneration in existing homes

Projected Growth in Elementary Students

Fall 2023 - Fall 2033

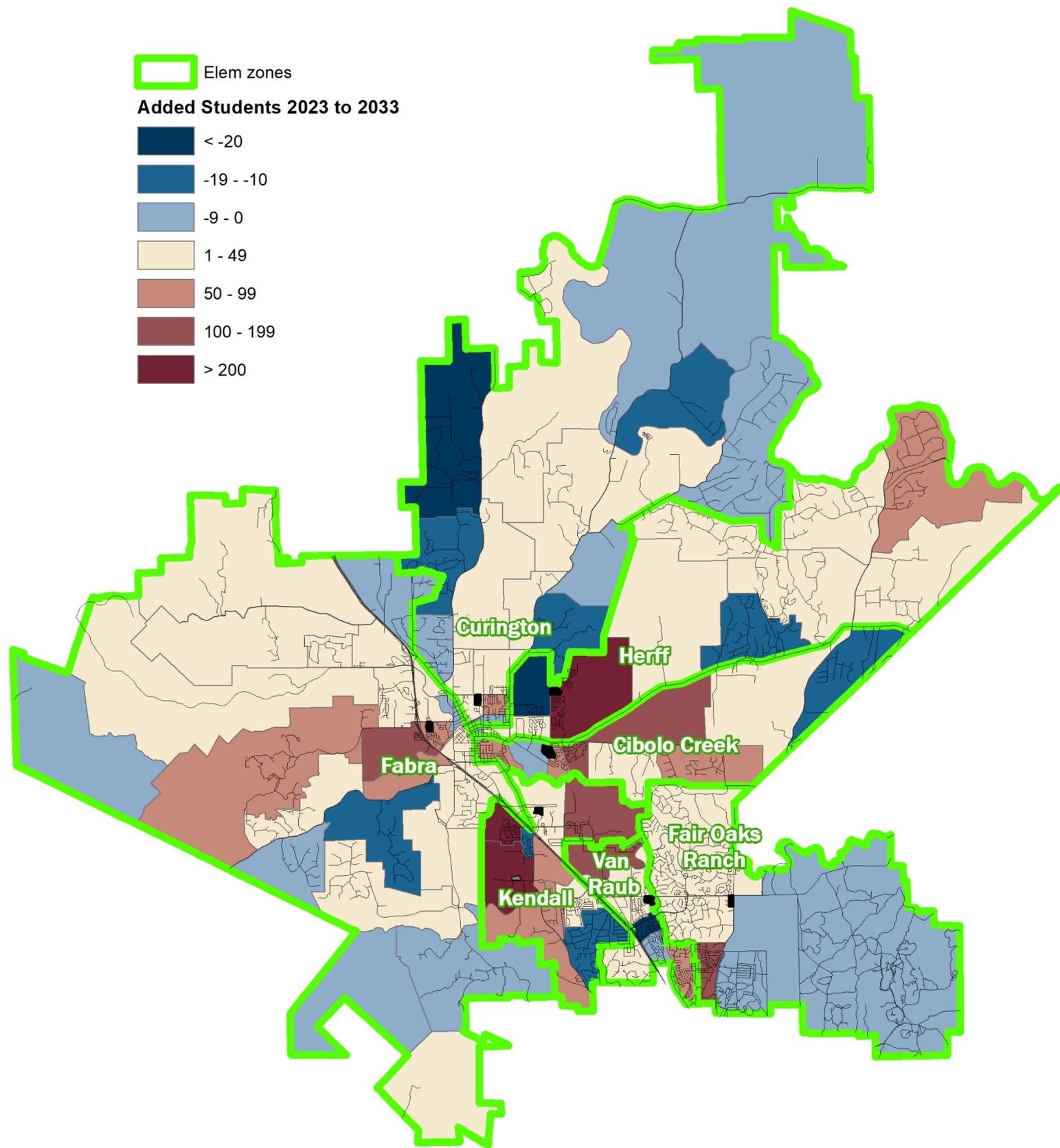
by Planning Unit



Projected Growth in Elementary Students

Fall 2023 - Fall 2033

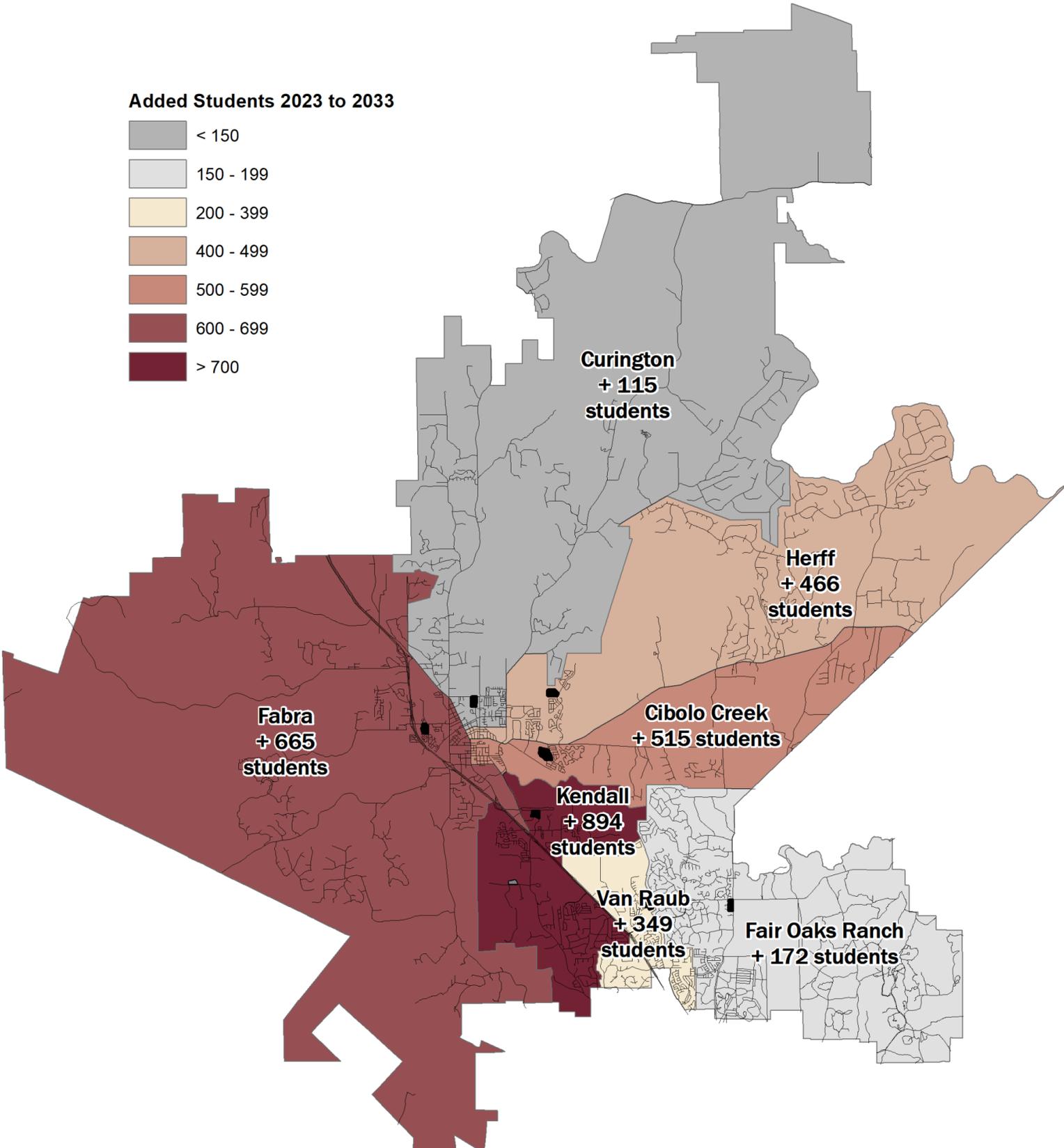
by Planning Unit
with Elem Attendance Zones



Projected Growth in Elementary Students

Fall 2023 - Fall 2033

by Attendance Zone



Projected Resident EE-5th Grade Students

Elementary Schools	Capacity	Current	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	Net Transfers 2023-24
Cibolo Creek	800	477	495	499	549	618	684	751	820	895	952	992	-40
Curington	700	602	603	584	607	588	611	639	664	688	704	717	36
Fabra	800	697	695	700	758	836	911	995	1,080	1,180	1,263	1,362	12
Fair Oaks Ranch	800	818	840	794	816	839	849	891	927	960	977	990	-13
Herff	800	598	601	599	647	701	742	804	868	936	999	1,064	25
Kendall	800	815	883	931	1,045	1,143	1,203	1,290	1,390	1,500	1,599	1,709	19
Van Raub	800	870	907	893	948	973	1,032	1,091	1,135	1,183	1,204	1,219	-39
Elem Total		4,877	5,024	5,000	5,370	5,698	6,032	6,461	6,884	7,342	7,698	8,053	

Yellow highlights = resident student population exceeds 100% of capacity

Orange highlights = resident student population exceeds 120% of capacity

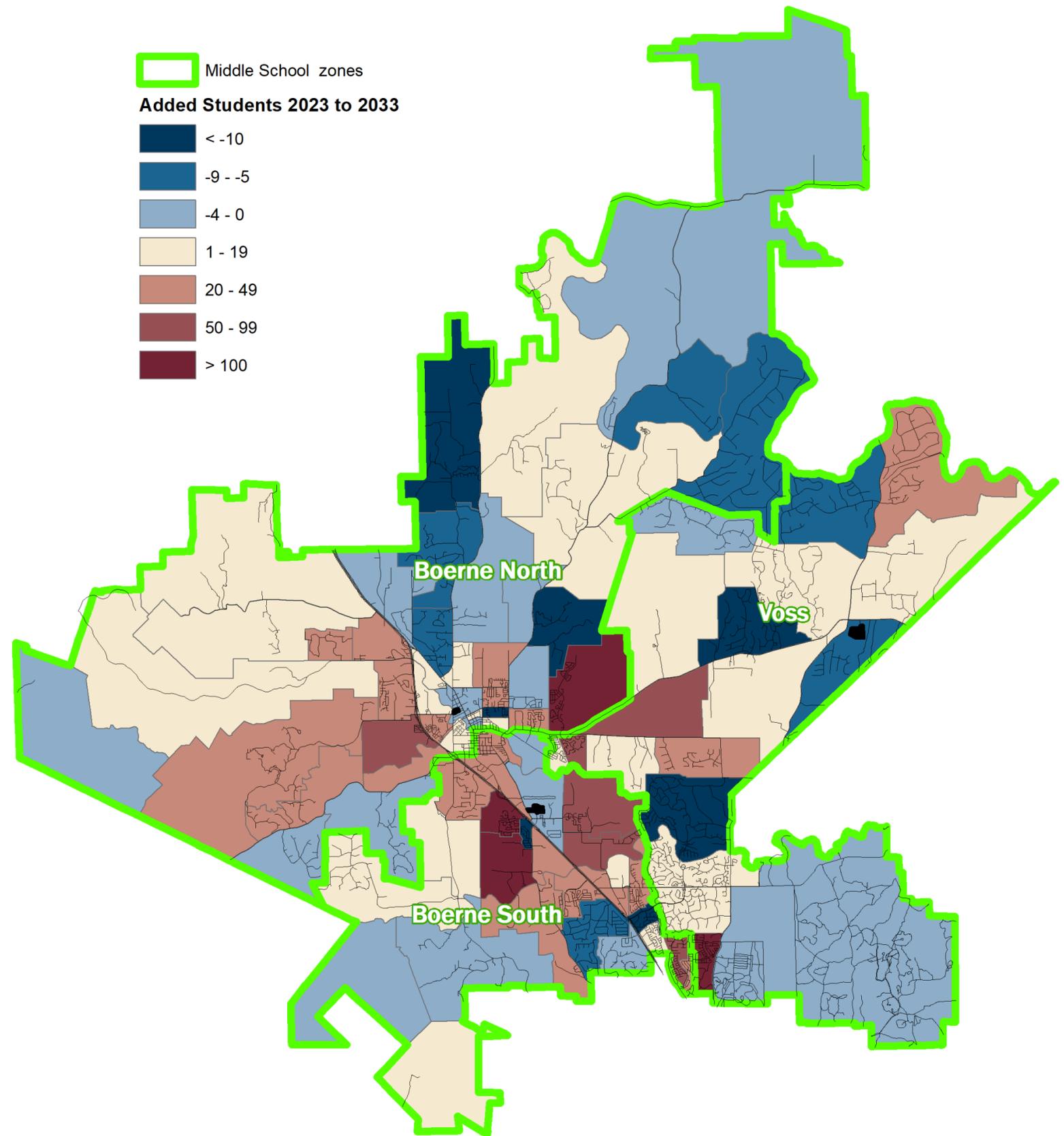


**Open
Viola Wilson ES**

Projected Growth in Middle School Students

Fall 2023 - Fall 2033

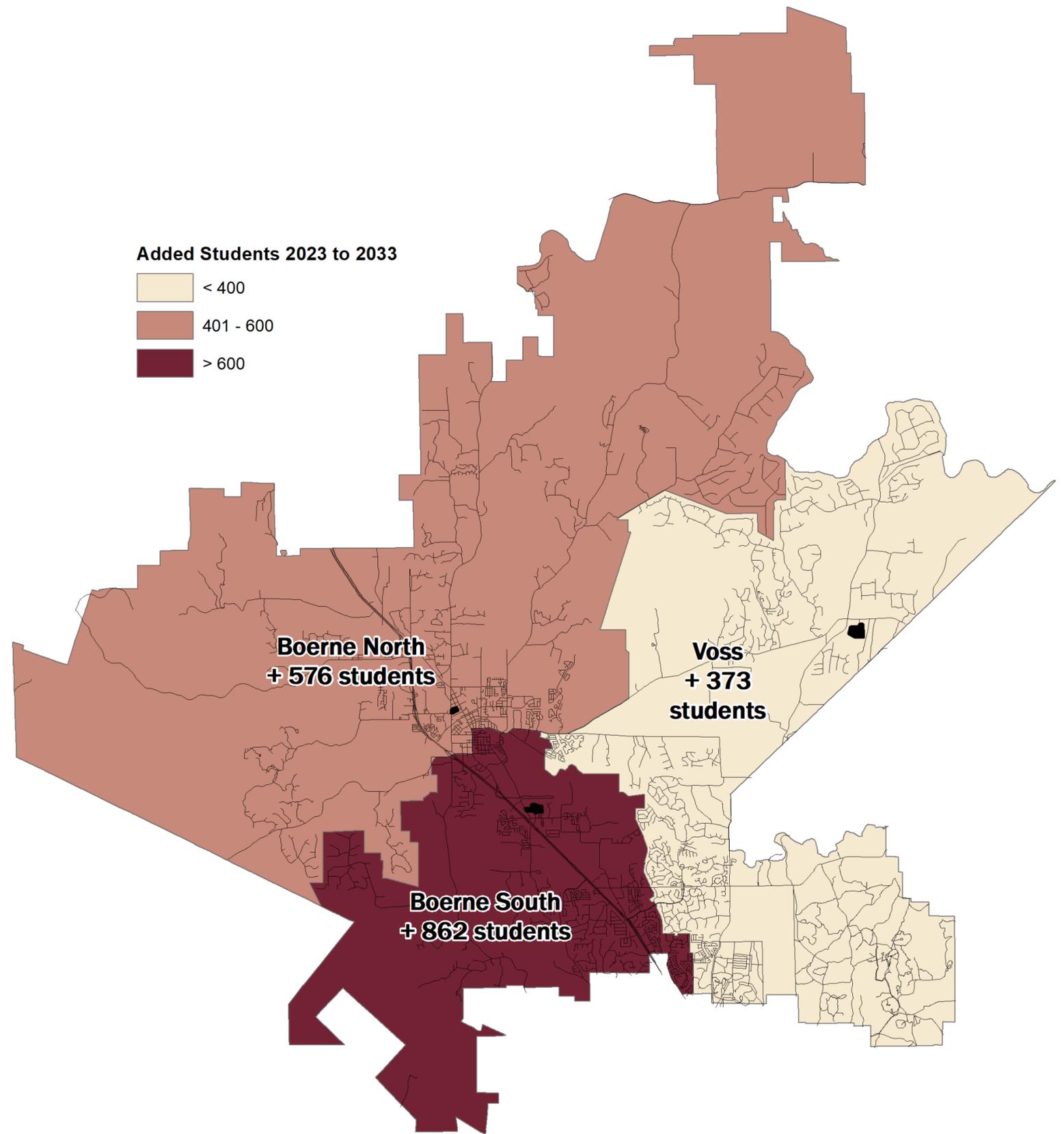
by Planning Unit
with MS Attendance Zones



Projected Growth in Middle School Students

Fall 2023 - Fall 2033

by Attendance Zone



Projected Resident 6th-8th Grade Students

Middle Schools	Planned Capacity	Current	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	Net Transfers 2023-24
Boerne North	1,100	796	819	902	911	984	1,001	1,031	1,043	1,102	1,248	1,372	29
Boerne South	1,300	953	962	1,081	1,108	1,240	1,323	1,402	1,453	1,515	1,678	1,815	-23
Voss	1,200	780	760	794	779	823	829	862	909	952	1,065	1,153	-6
MS Total		2,529	2,541	2,777	2,798	3,047	3,153	3,295	3,405	3,569	3,991	4,340	

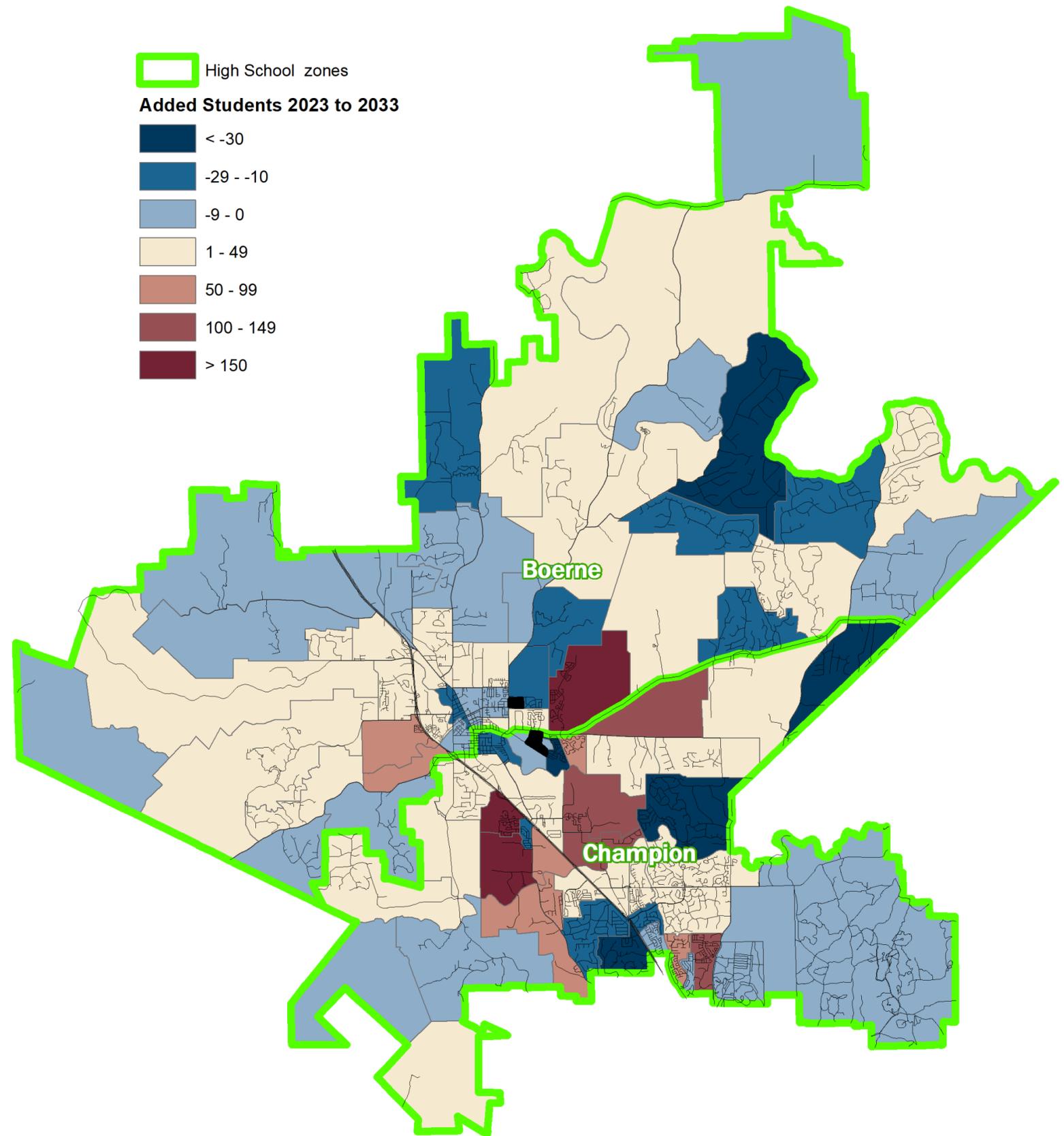
Yellow highlights = resident student population exceeds 100% of capacity

Orange highlights = resident student population exceeds 120% of capacity

Projected Growth in High School Students

Fall 2023 - Fall 2033

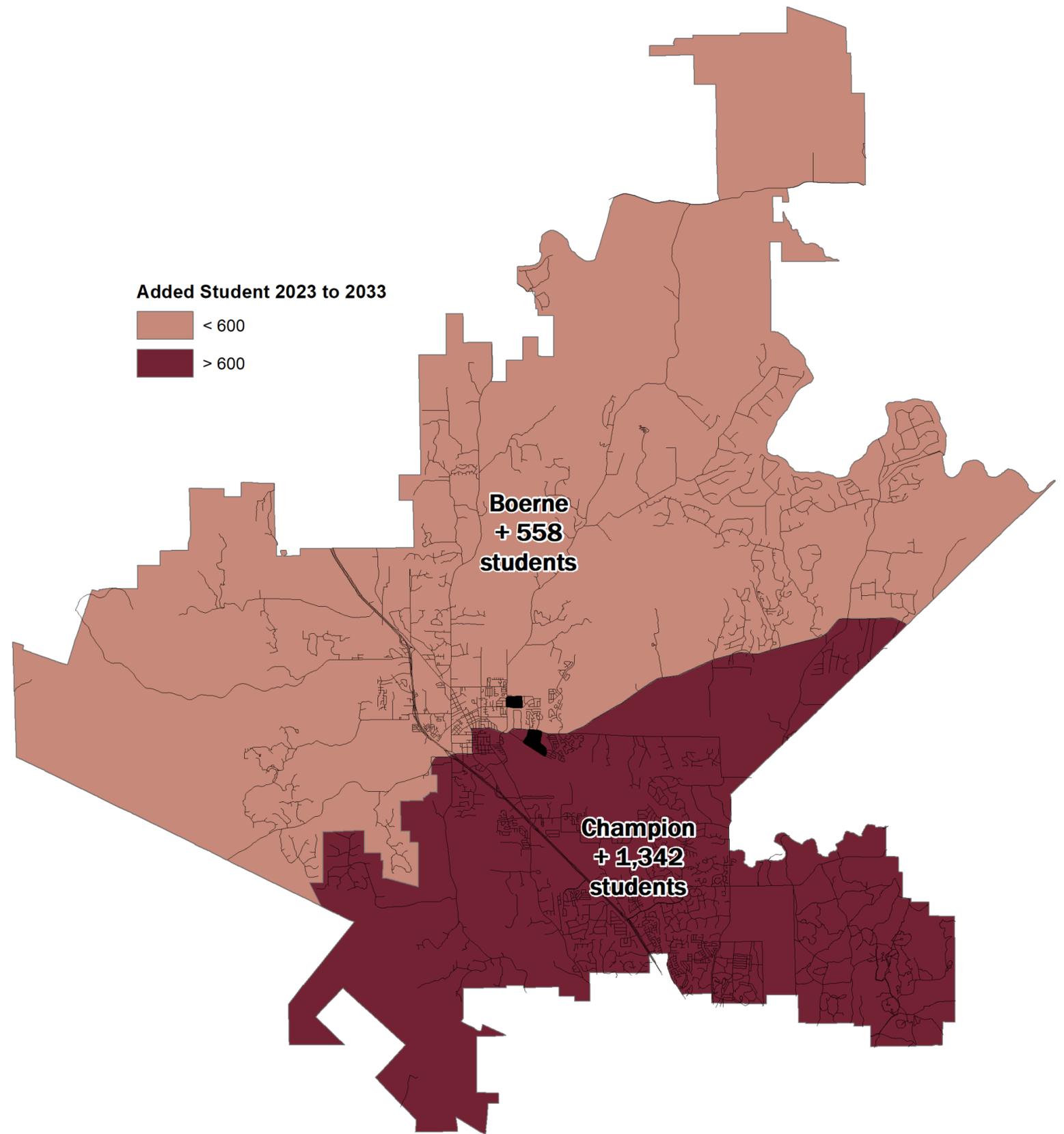
by Planning Unit
with HS Attendance Zones



Projected Growth in High School Students

Fall 2023 - Fall 2033

by Attendance Zone



Projected Resident 9th-12th Grade Students

High Schools	Planned Capacity	Current	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	Net Transfers 2023-24
Boerne HS	1,900	1,354	1,378	1,415	1,460	1,483	1,590	1,630	1,704	1,778	1,804	1,912	72
Champion HS	2,600	2,149	2,226	2,262	2,411	2,453	2,645	2,806	2,943	3,226	3,297	3,491	-72
HS Total		3,503	3,604	3,677	3,871	3,936	4,235	4,436	4,647	5,004	5,101	5,403	

Yellow highlights = resident student population exceeds 100% of capacity

Orange highlights = resident student population exceeds 120% of capacity



Questions?



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