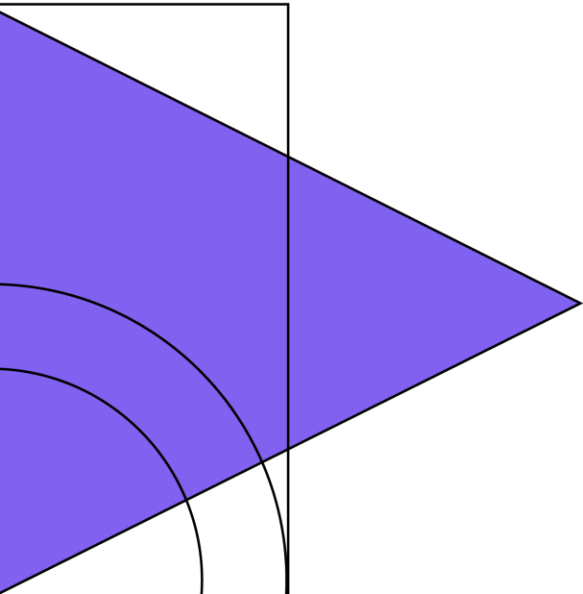
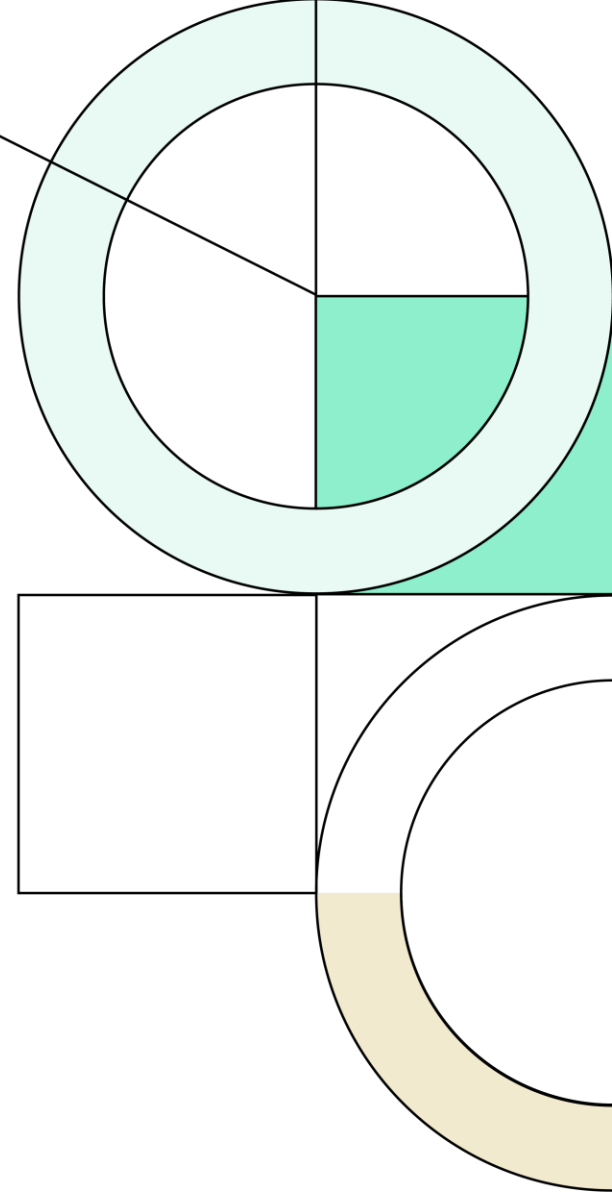


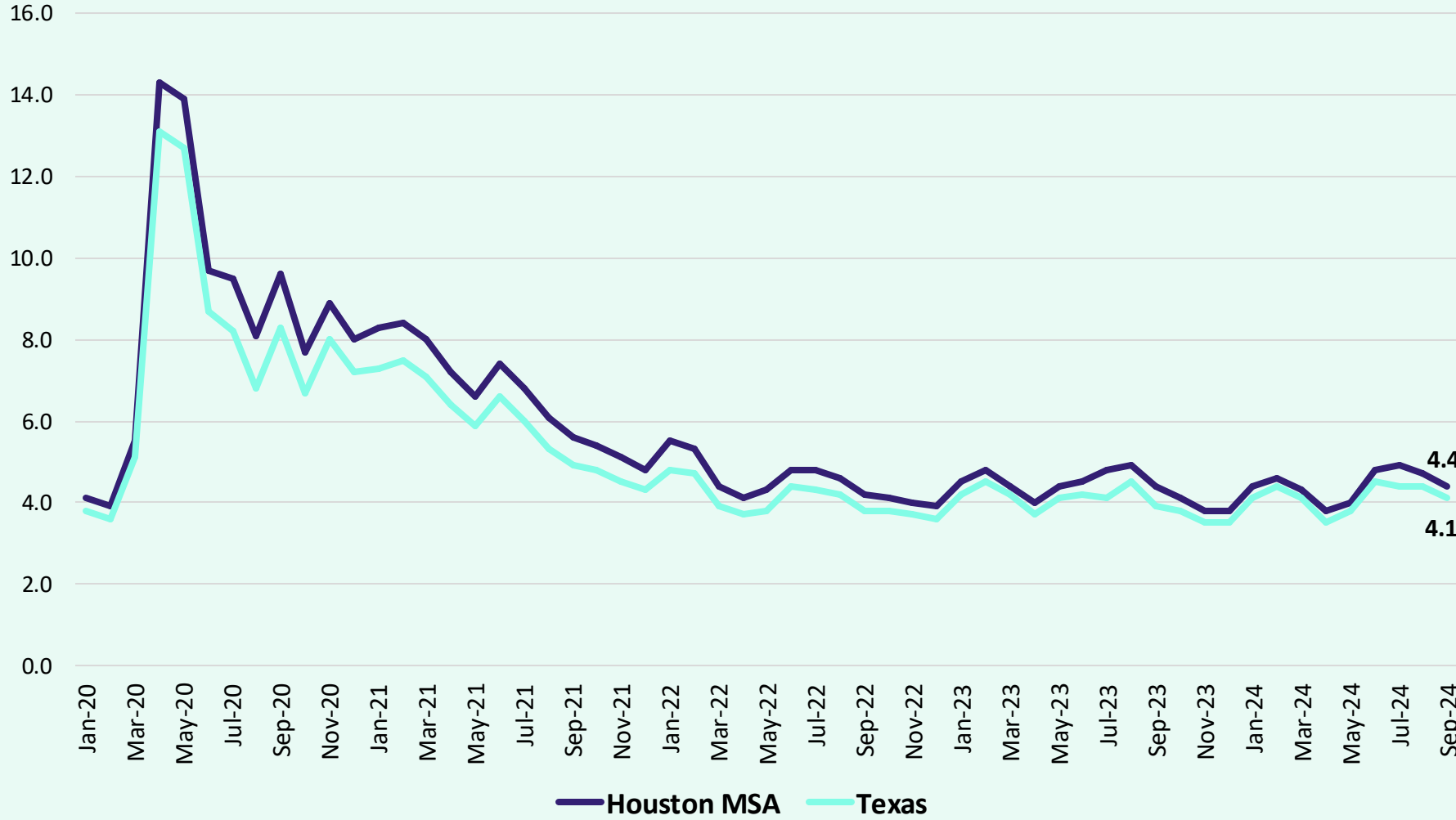


Fall 2024/25
Demographic Report

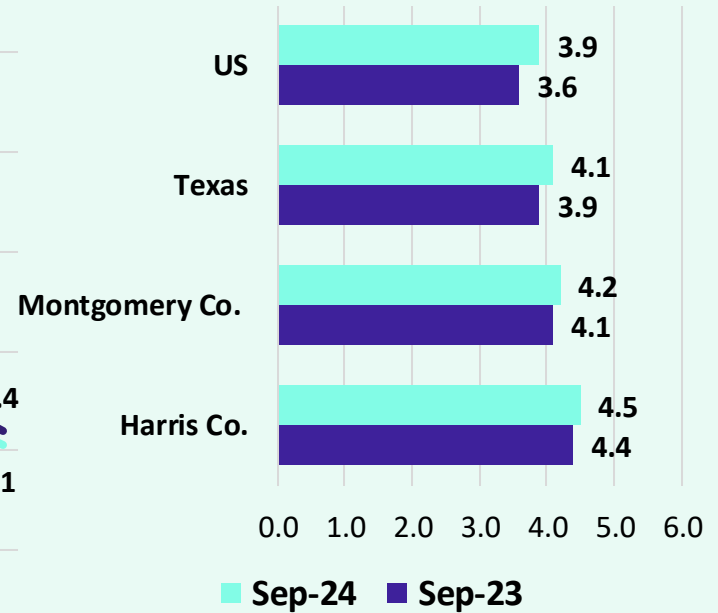




Unemployment Rates, Jan. 2020 - Sept. 2024



Unemployment Rate, Year Over Year



■ Sep-24 ■ Sep-23



Housing Activity by MSA



Top 25 Housing Starts Markets (3Q2024)

Rank	Market	3Q24 Annualized Starts	3Q24 YOY Change	3Q19 Annualized Starts	Change from 2019
1	Dallas	46,635	11%	33,560	39%
2	Houston	38,128	14%	29,712	28%
3	Phoenix	23,399	50%	21,093	11%
4	Atlanta	18,338	6%	22,899	-20%
5	San Antonio	17,751	33%	13,180	35%
6	Austin	16,663	11%	17,409	-4%
7	Orlando	14,595	-2%	14,056	4%
8	Tampa	12,459	3%	12,144	3%
9	Charlotte	11,625	0%	11,837	-2%
10	Raleigh	11,045	12%	9,723	14%
11	Riverside/San Bernardino	10,871	-2%	9,377	16%
12	Las Vegas	10,870	22%	9,834	11%
13	Miami	10,603	44%	8,387	26%
14	Washington, DC	10,439	2%	12,980	-20%
15	Sarasota	10,387	10%	5,897	76%
16	Jacksonville	10,297	12%	8,506	21%
17	Nashville	9,887	17%	8,439	17%
18	Lakeland	8,556	29%	4,885	75%
19	Denver	8,291	22%	10,144	-18%
20	Portland	8,226	108%	5,143	60%
21	Seattle	7,814	37%	9,002	-13%
22	Minneapolis	7,121	13%	7,755	-8%
23	Sacramento	7,060	20%	5,856	21%
24	Chicago	6,947	19%	6,420	8%
25	Indianapolis	6,846	16%	5,874	17%

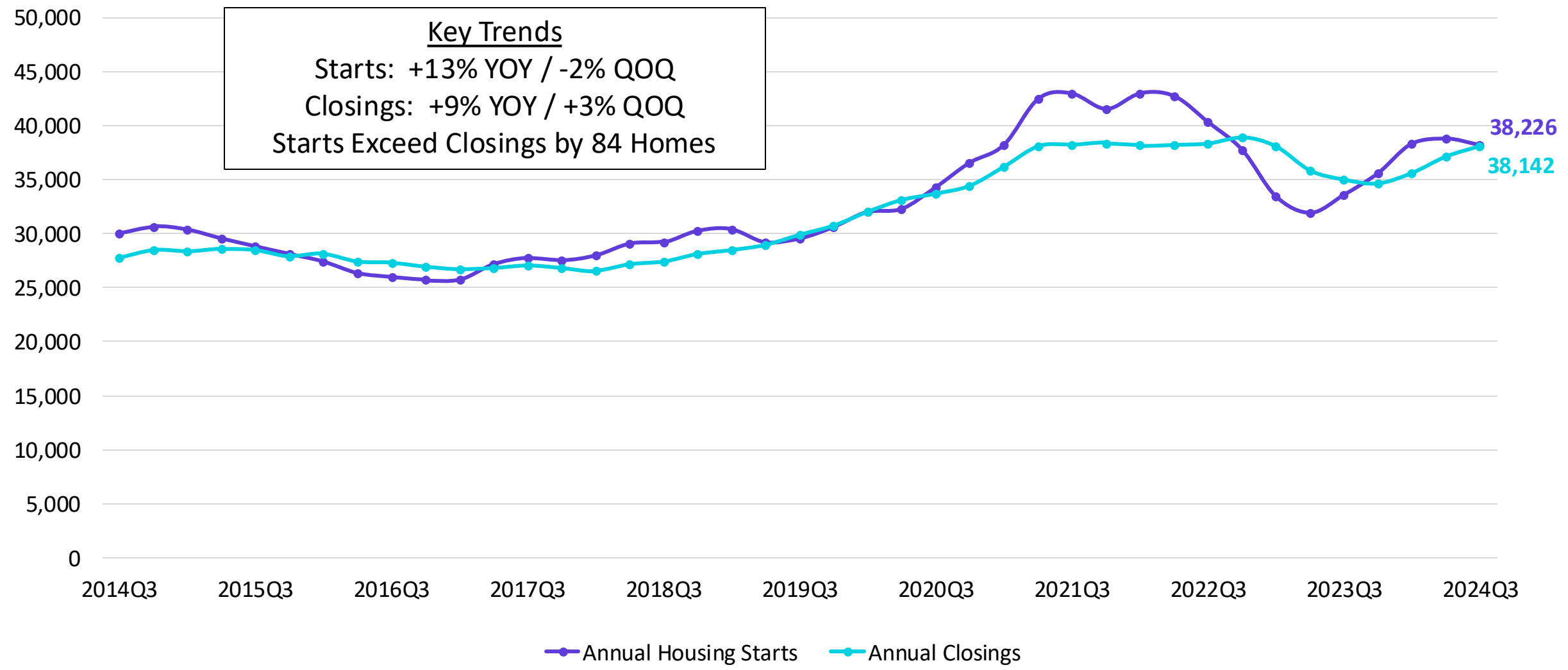
Source: Zonda



Houston New Home Starts & Closings

Annual Housing Starts vs. Annual Closings

Key Trends
 Starts: +13% YOY / -2% QOQ
 Closings: +9% YOY / +3% QOQ
 Starts Exceed Closings by 84 Homes

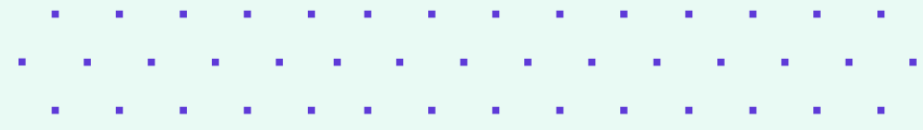
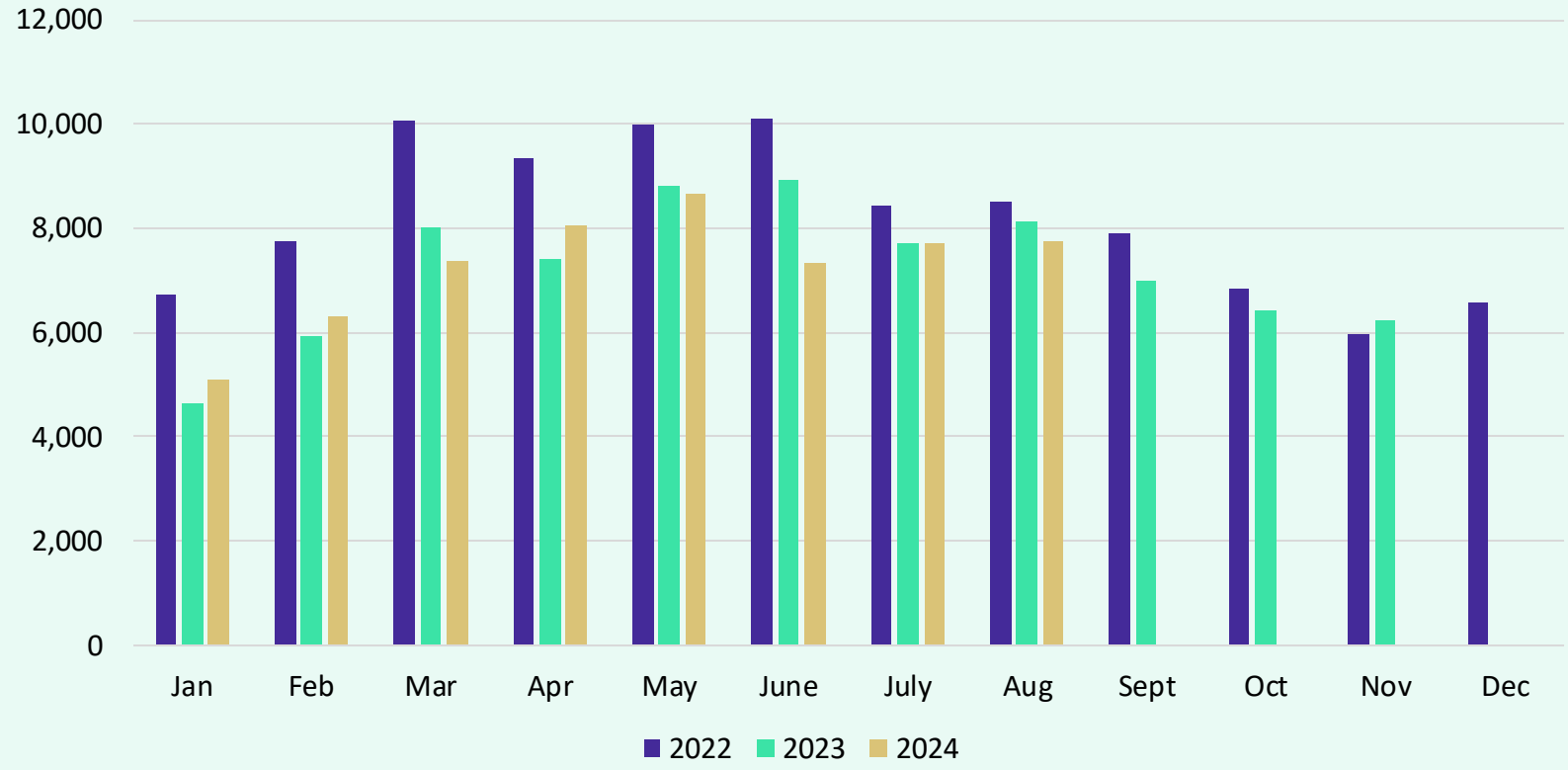


—●— Annual Housing Starts —●— Annual Closings



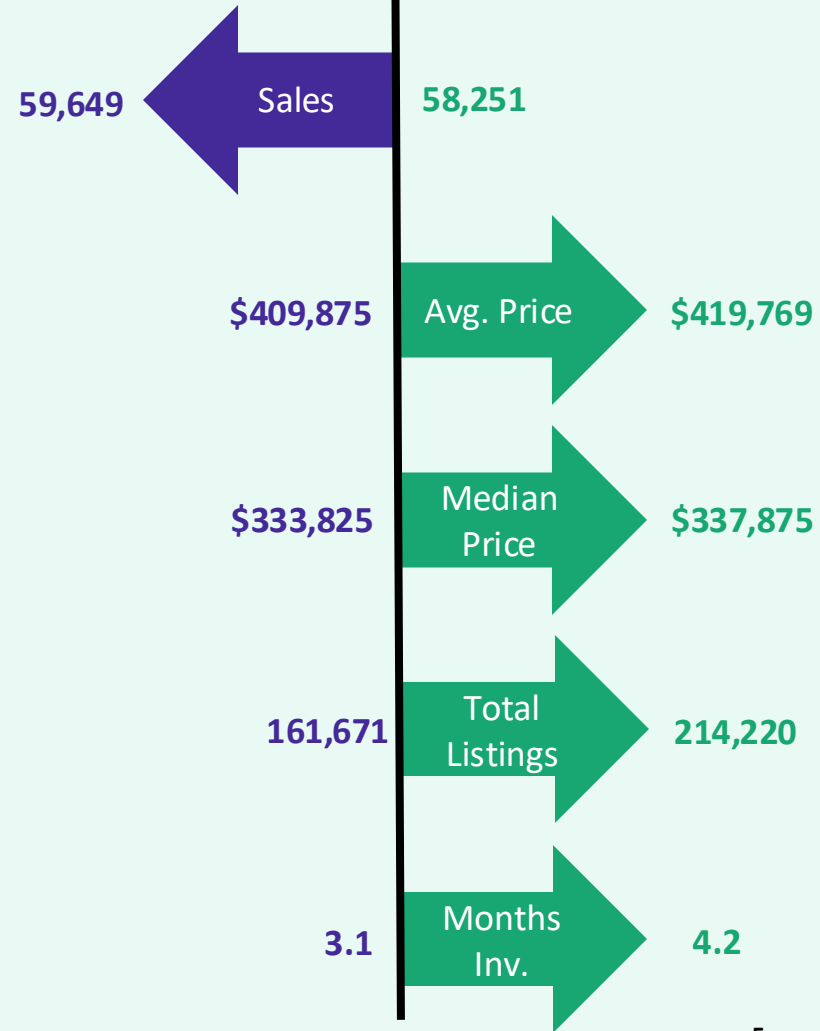
Houston Housing Market Trends

Houston MSA Monthly Sales, 2022-2024



YOY Housing Trends

Jan.-Aug. 2023 | Jan.-Aug. 2024



- Median and average home prices increased in the 3 quarters of 2024 as the number of listings increased over the same period in 2023
- After a solid start to the year, buyer confidence has tempered, and sales have followed
- Inventory has continued to climb in 2024 as sales slowed



Houston New Home Ranking Report

ISD Ranked by Annual Closings – 3Q24

Rank	District	Annual Starts	Annual Closings	Inventory	VDL	Future
1	LAMAR CISD	4,937	4,751	2,616	4,507	50,822
2	CONROE ISD	3,448	3,846	1,873	4,696	23,290
3	KATY ISD	2,947	3,396	1,608	3,254	15,576
4	CYPRESS-FAIRBANKS ISD	2,176	2,823	1,115	1,133	12,371
5	HOUSTON ISD	2,626	2,599	2,411	2,874	15,306
6	FORT BEND ISD	2,400	2,309	1,379	2,008	9,532
7	WALLER ISD	2,907	2,001	1,857	3,677	47,023
8	MAGNOLIA ISD	2,045	1,941	1,223	3,545	33,438
9	ALVIN ISD	1,551	1,512	1,093	3,368	18,089
10	NEW CANEY ISD	1,368	1,398	687	1,612	7,315
11	WILLIS ISD	1,429	1,283	1,014	3,263	8,675
12	SPRING ISD	1,054	1,092	436	499	6,069
13	TOMBALL ISD	992	1,078	549	1,234	4,185
14	DICKINSON ISD	1,237	945	858	1,642	8,910
15	SPLENDORA ISD	674	932	428	1,814	11,057
16	GOOSE CREEK CISD	453	720	197	290	2,763
17	HUMBLE ISD	451	689	266	390	1,870
18	SPRING BRANCH ISD	540	544	494	566	820
19	CLEAR CREEK ISD	737	522	530	838	8,682
20	CROSBY ISD	440	501	297	1,001	7,897

* Based on additional research by Zonda Education
 ** Totals **DO NOT** include age-restricted communities



District New Home Starts and Closings



Starts	2018	2019	2020	2021	2022	2023	2024
1Q	265	291	380	399	448	256	288
2Q	321	311	366	527	320	340	338
3Q	321	323	461	413	268	282	116
4Q	196	288	403	276	135	250	0
Total	1,103	1,213	1,610	1,615	1,171	1,128	742

Closings	2018	2019	2020	2021	2022	2023	2024
1Q	215	247	331	349	384	284	252
2Q	234	318	399	356	398	195	314
3Q	305	373	404	262	322	334	247
4Q	251	310	429	428	402	265	0
Total	1,005	1,248	1,563	1,395	1,506	1,078	813



District Housing Overview by Elementary Zone

Elementary	Annual Starts	Quarter Starts	Annual Closings	Quarter Closings	Under Const.	Inventory	Vacant Dev. Lots	Future
CANYON POINTE	0	0	0	0	0	0	0	0
CREEKSIDE FOREST	0	0	0	0	0	0	0	0
CREEKVIEW	1	0	12	2	0	0	0	186
DECKER PRAIRIE	37	0	6	0	37	39	8	1,149
GRAND OAKS	188	23	196	55	93	135	341	102
LAKEWOOD	0	0	0	0	0	0	0	0
ROSEHILL	313	71	308	63	137	170	228	578
TIMBER CREEK	161	5	223	41	41	58	63	0
TOMBALL	107	11	93	21	43	85	351	728
WEST	185	6	240	65	43	62	243	1,442
WILDWOOD	0	0	0	0	0	0	0	0
WILLOW CREEK	0	0	0	0	0	0	0	0
Grand Total	992	116	1,078	247	394	549	1,234	4,185



Highest activity in the category



Second highest activity in the category



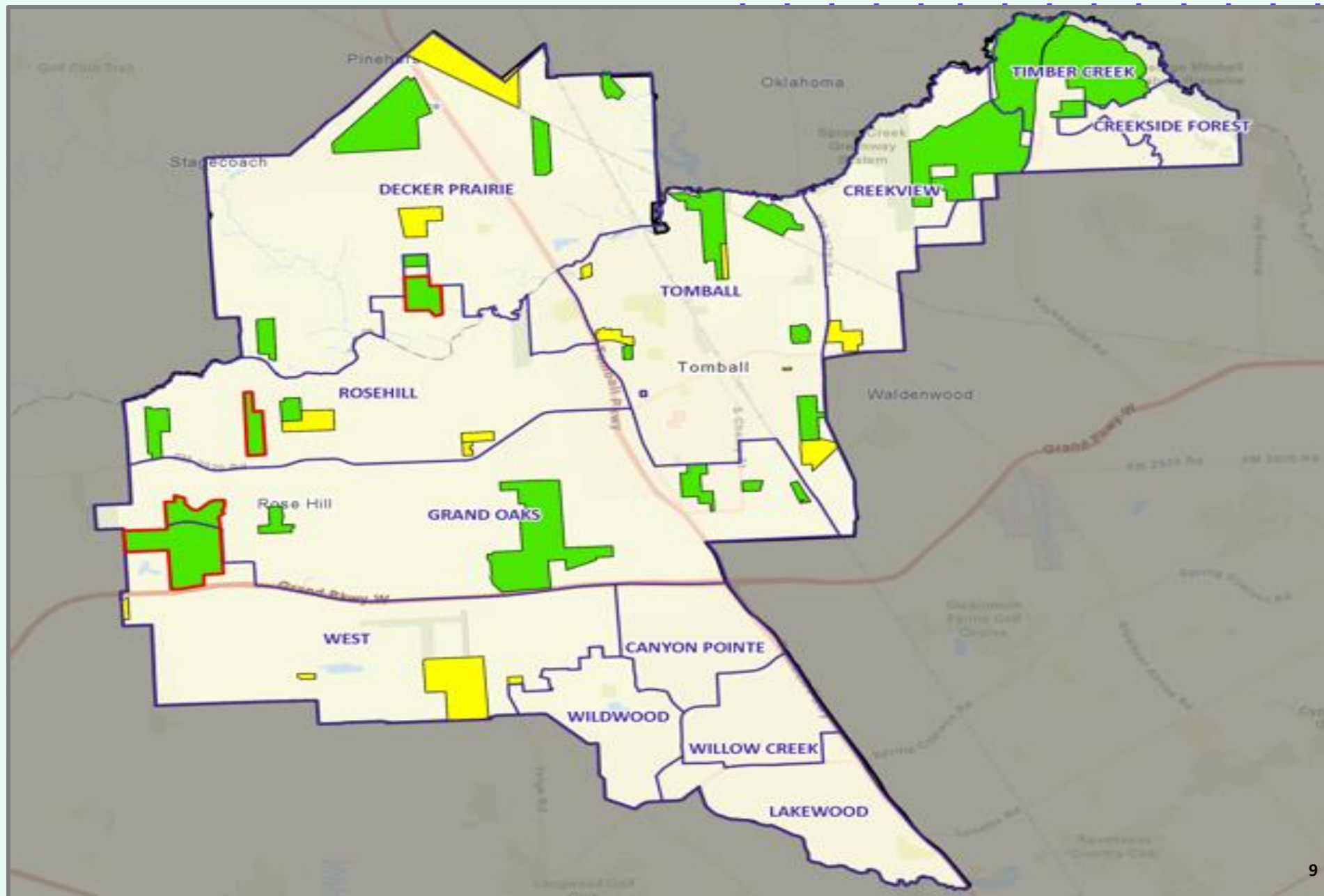
Third highest activity in the category

** Totals **DO NOT** include age-restricted communities



District Housing Overview

- The District has 39 actively building subdivisions
- Within Tomball ISD, there are 10 future subdivisions planned
- Ground-work is currently underway on approximately 200 lots in 3 subdivisions
- 281 lots were delivered in the 3rd quarter





Residential Activity

October 2024





Residential Activity

October 2024



Butlers Bend

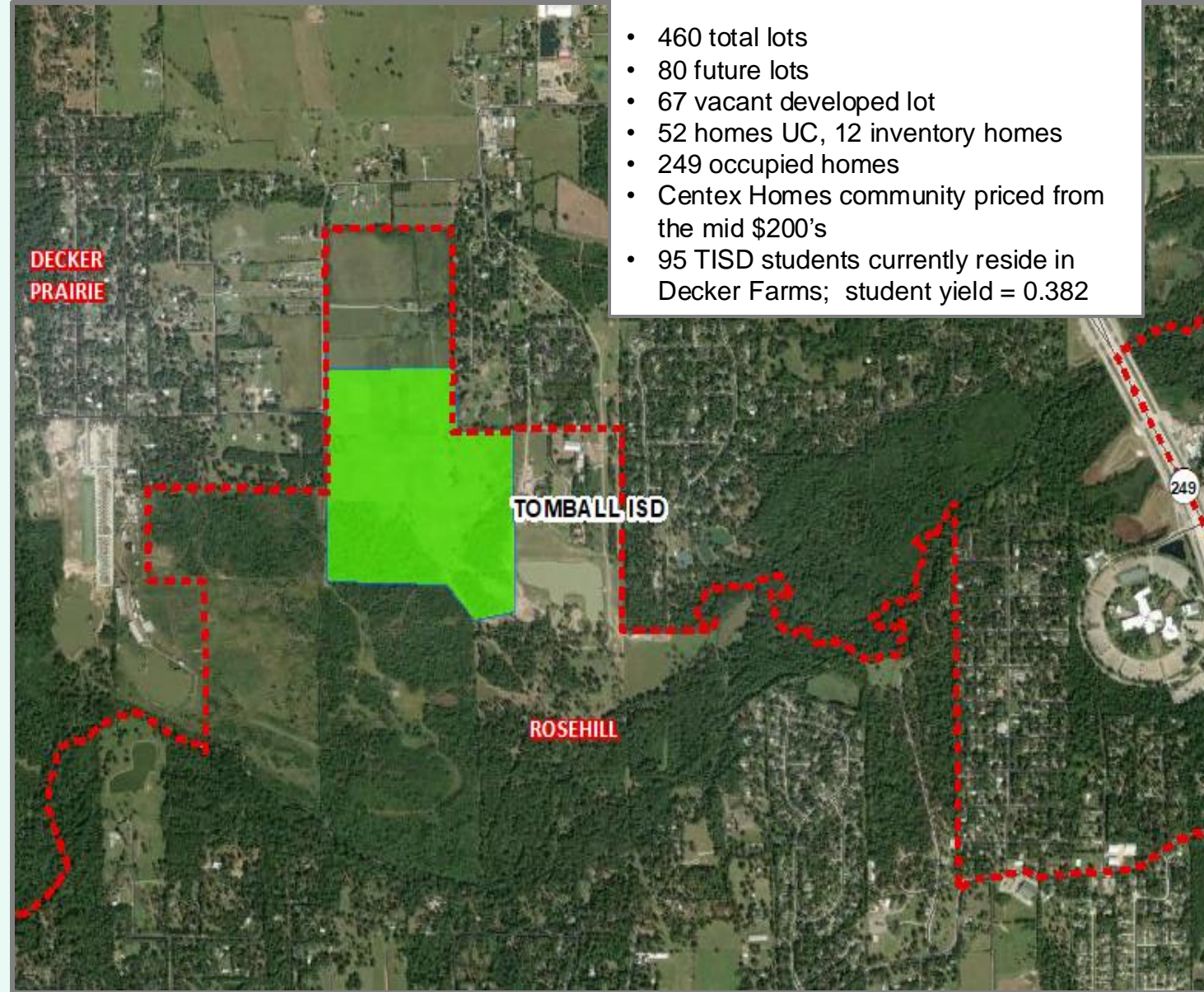
- 248 total lots
- 210 future lots
- 1 vacant developed lot
- 36 homes UC, 1 inventory home
- DR Horton community starting from the low \$300's





Residential Activity

October 2024



Decker Farms

- 460 total lots
- 80 future lots
- 67 vacant developed lot
- 52 homes UC, 12 inventory homes
- 249 occupied homes
- Centex Homes community priced from the mid \$200's
- 95 TISD students currently reside in Decker Farms; student yield = 0.382



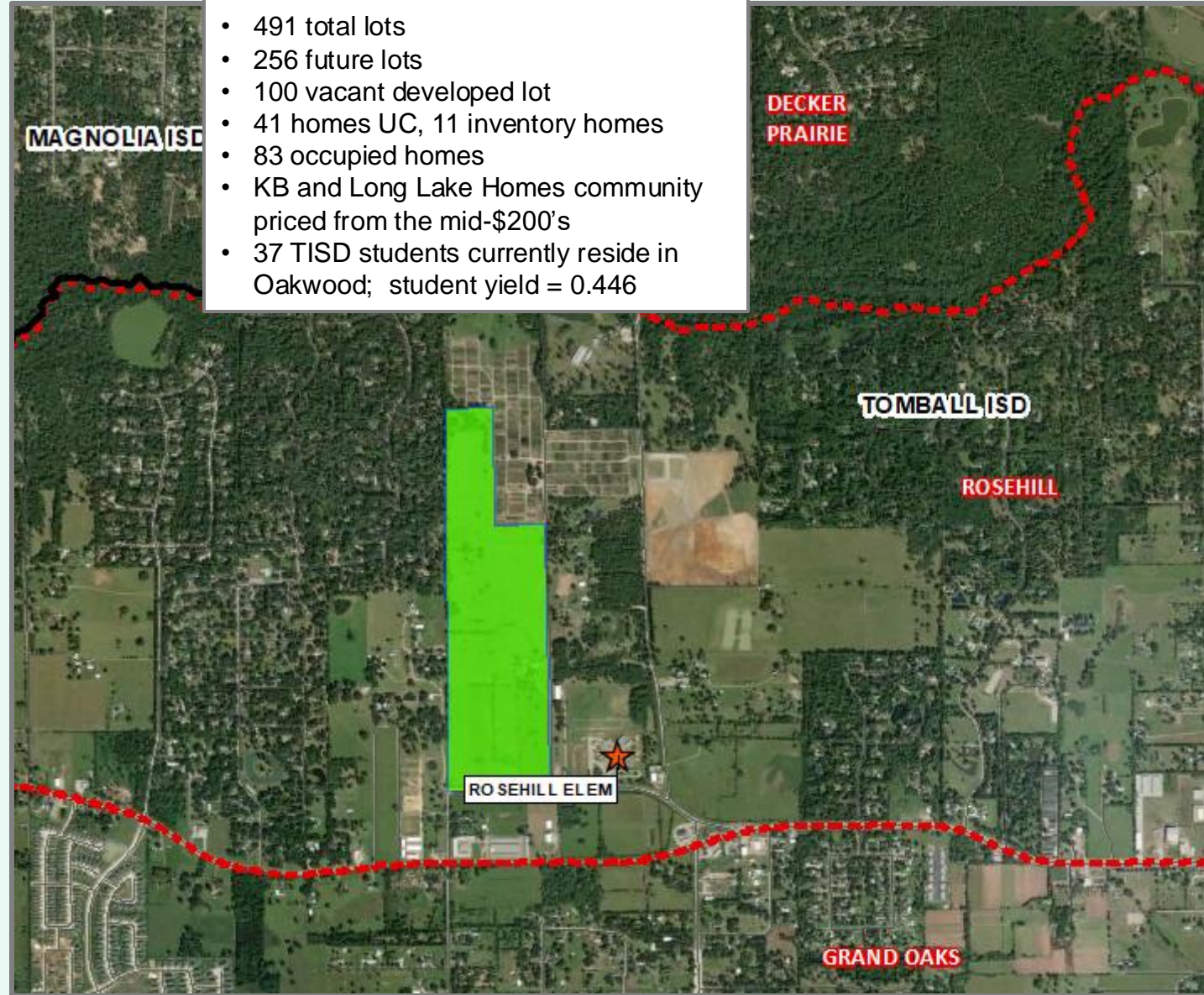
Residential Activity

October 2024



Oakwood

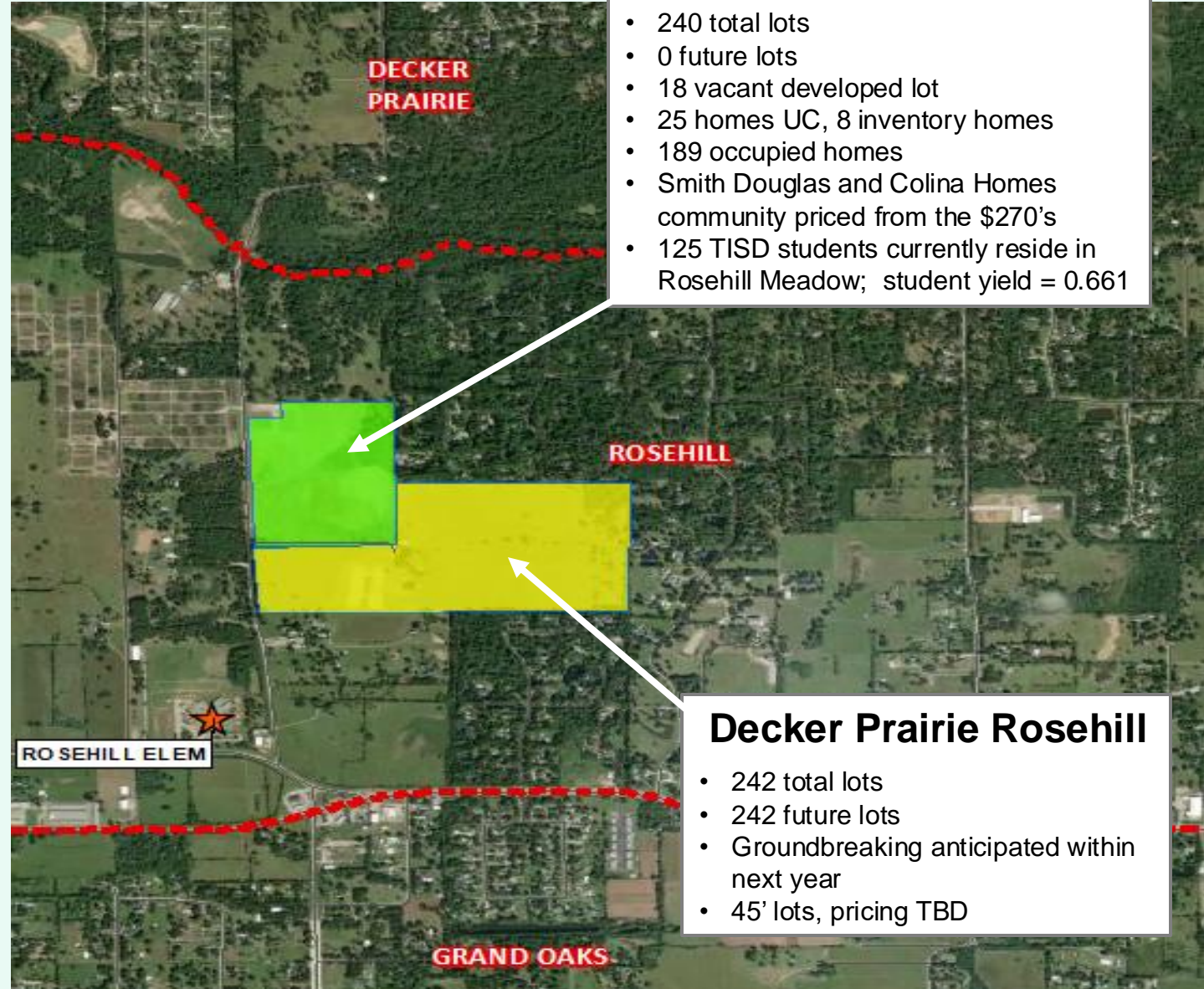
- 491 total lots
- 256 future lots
- 100 vacant developed lot
- 41 homes UC, 11 inventory homes
- 83 occupied homes
- KB and Long Lake Homes community priced from the mid-\$200's
- 37 TISD students currently reside in Oakwood; student yield = 0.446





Residential Activity

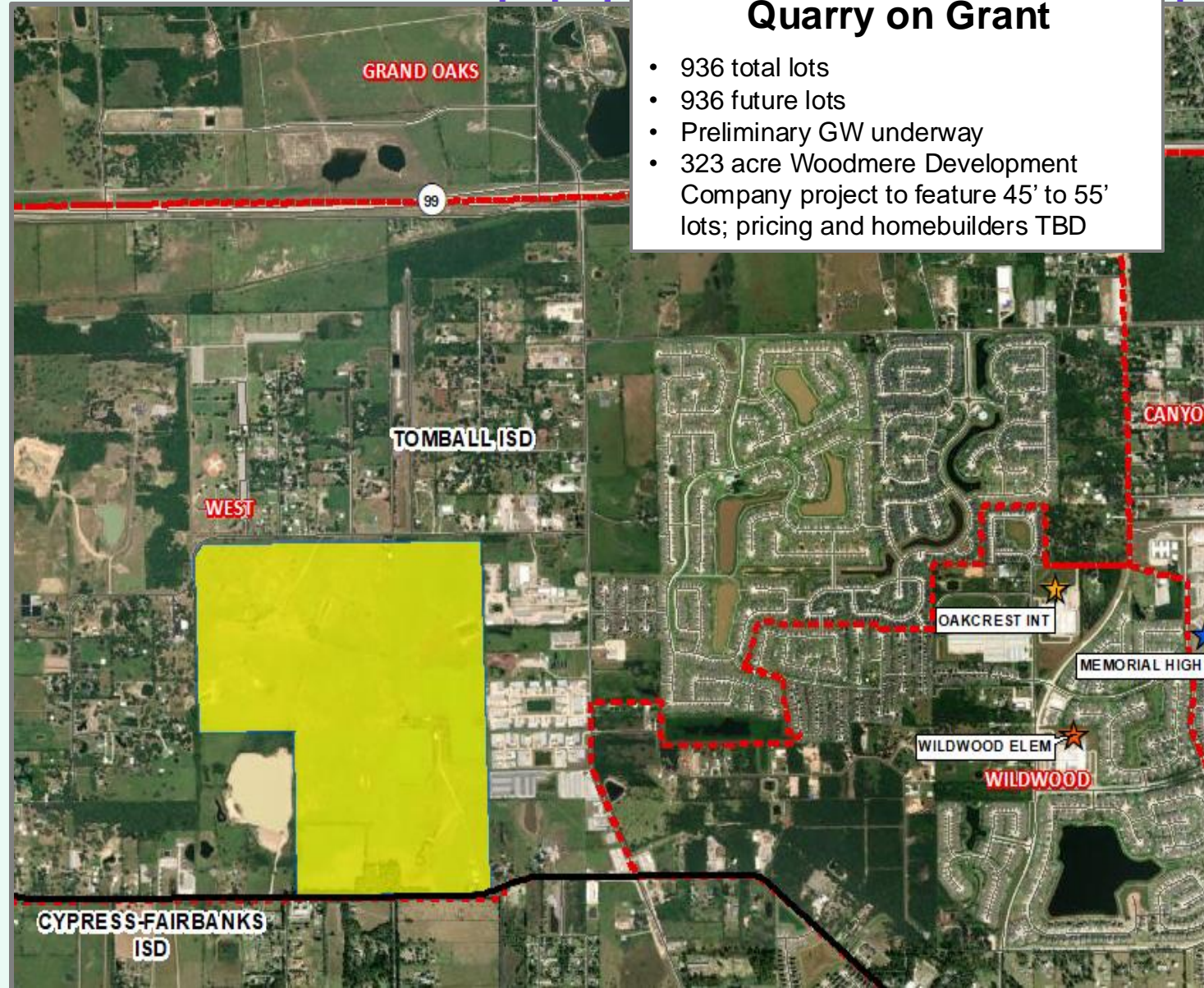
October 2024





Residential Activity

October 2024



Quarry on Grant

- 936 total lots
- 936 future lots
- Preliminary GW underway
- 323 acre Woodmere Development Company project to feature 45' to 55' lots; pricing and homebuilders TBD

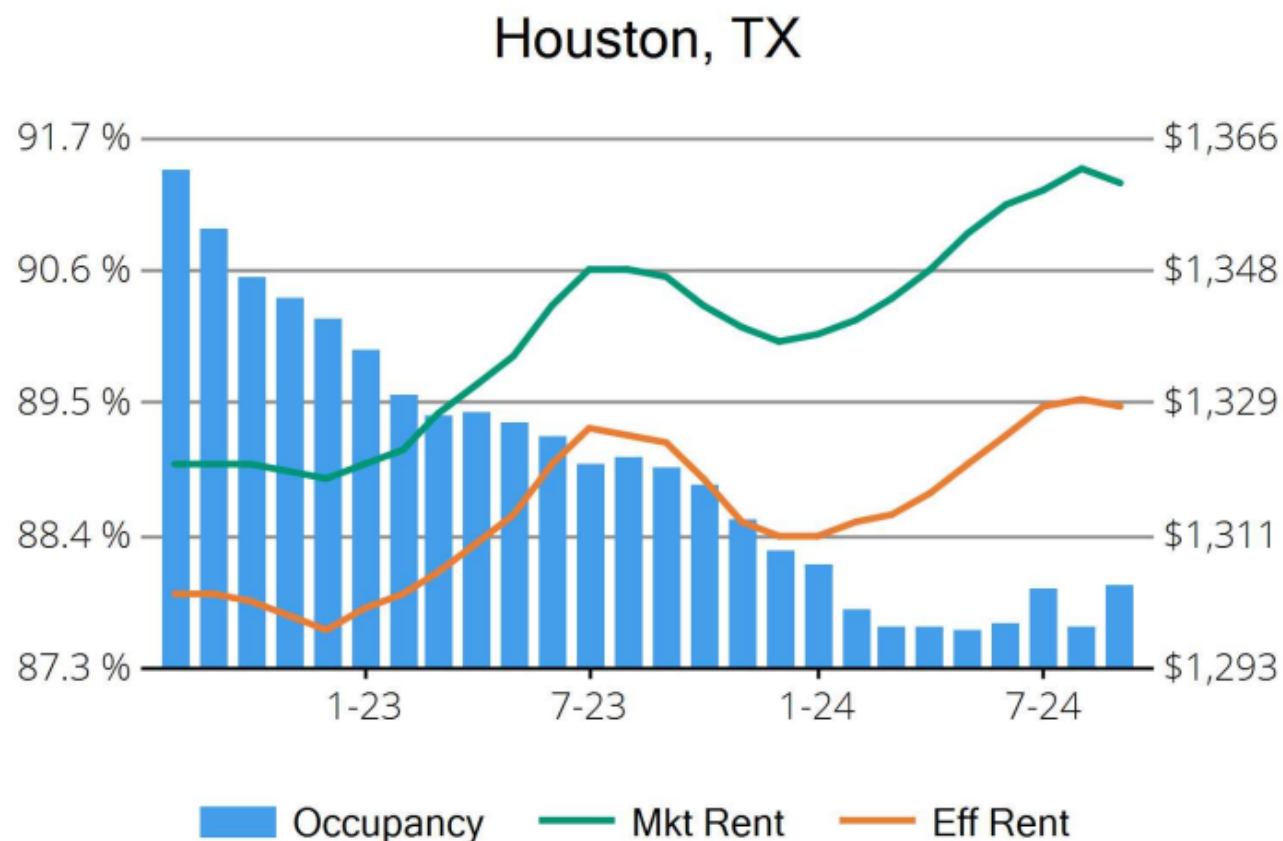


Housing Market Trends: Multi-family Market- September 2024



Stabilized and Lease-up Properties

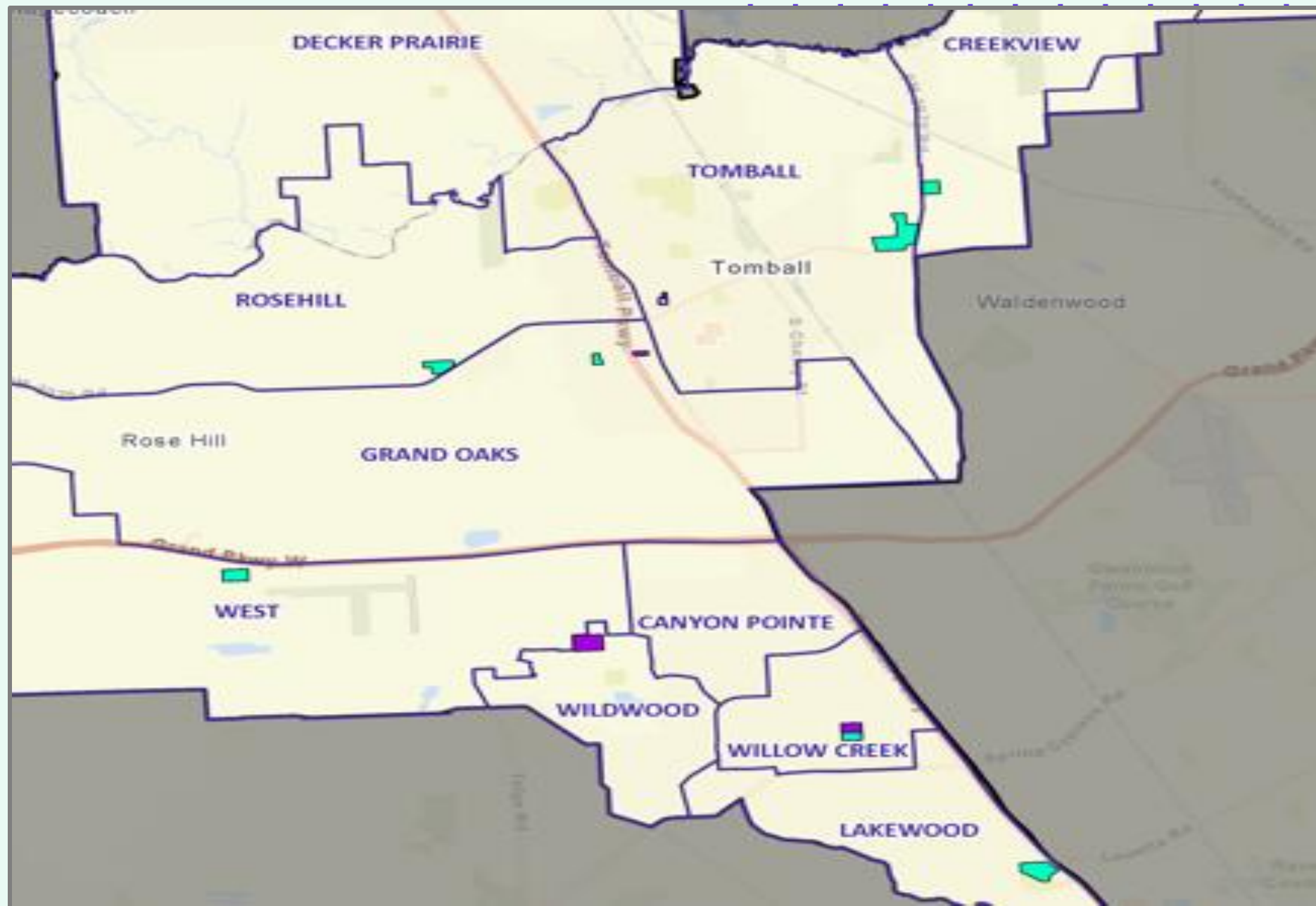
Conventional Properties	Sep 2024	Annual Change
Occupancy	88.0	-1.1%
Unit Change	19,317	
Units Absorbed (Annual)	10,637	
Average Size (SF)	891	+0.1%
Asking Rent	\$1,360	+1.0%
Asking Rent per SF	\$1.53	+0.9%
Effective Rent	\$1,329	+0.4%
Effective Rent per SF	\$1.49	+0.3%
% Offering Concessions	34%	+19.9%
Avg. Concession Package	6.4%	+15.5%







District Multifamily Overview

- There are approximately 520 multi-family units currently under construction, 204 of which are single family rental homes
- There are more than 1,300 future multi-family units in various stages of planning across the district in 7 separate projects



Multi-Family Developments

-  FUTURE
-  UNDER CONSTRUCTION



Residential Activity

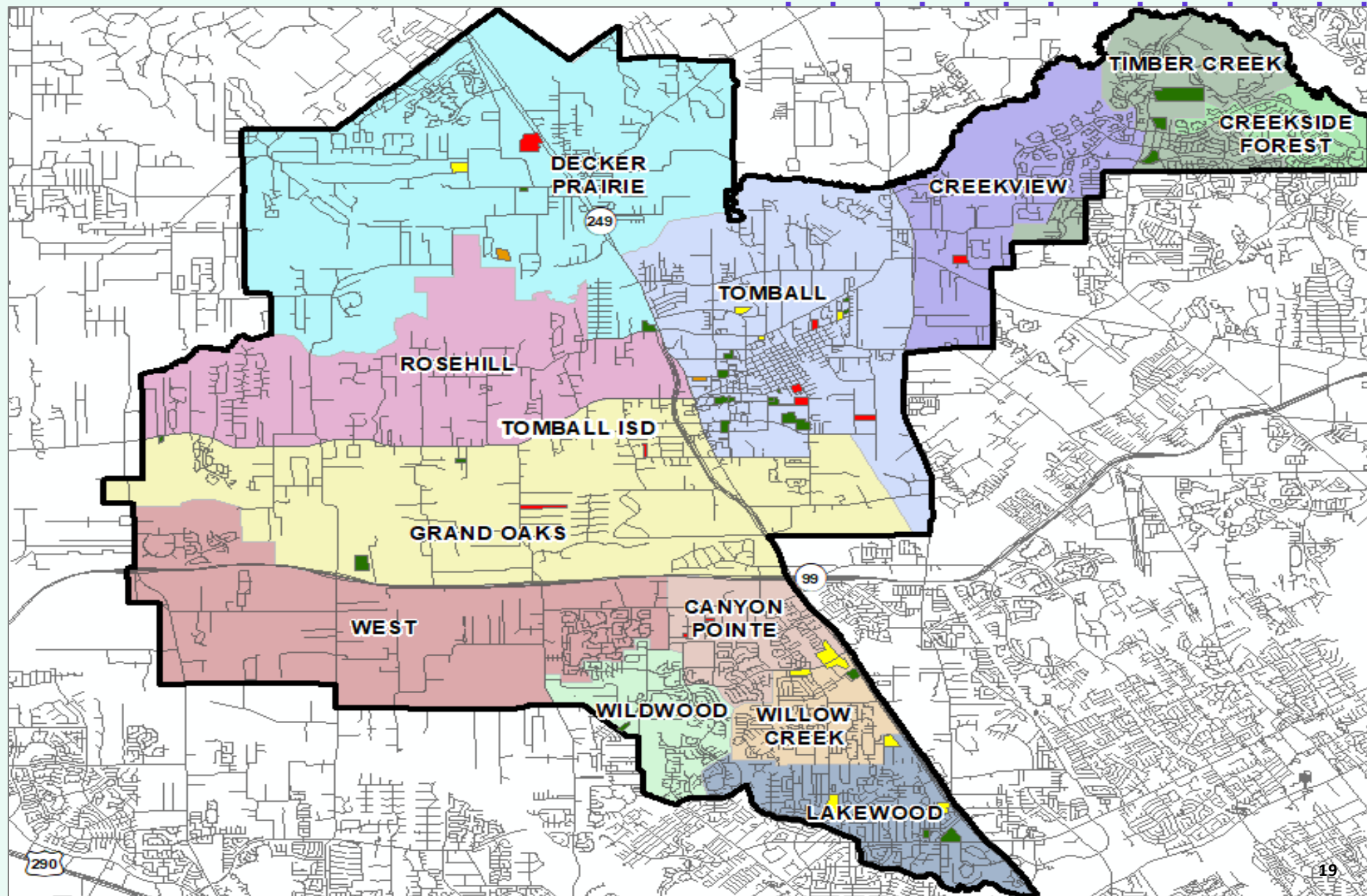
October 2024





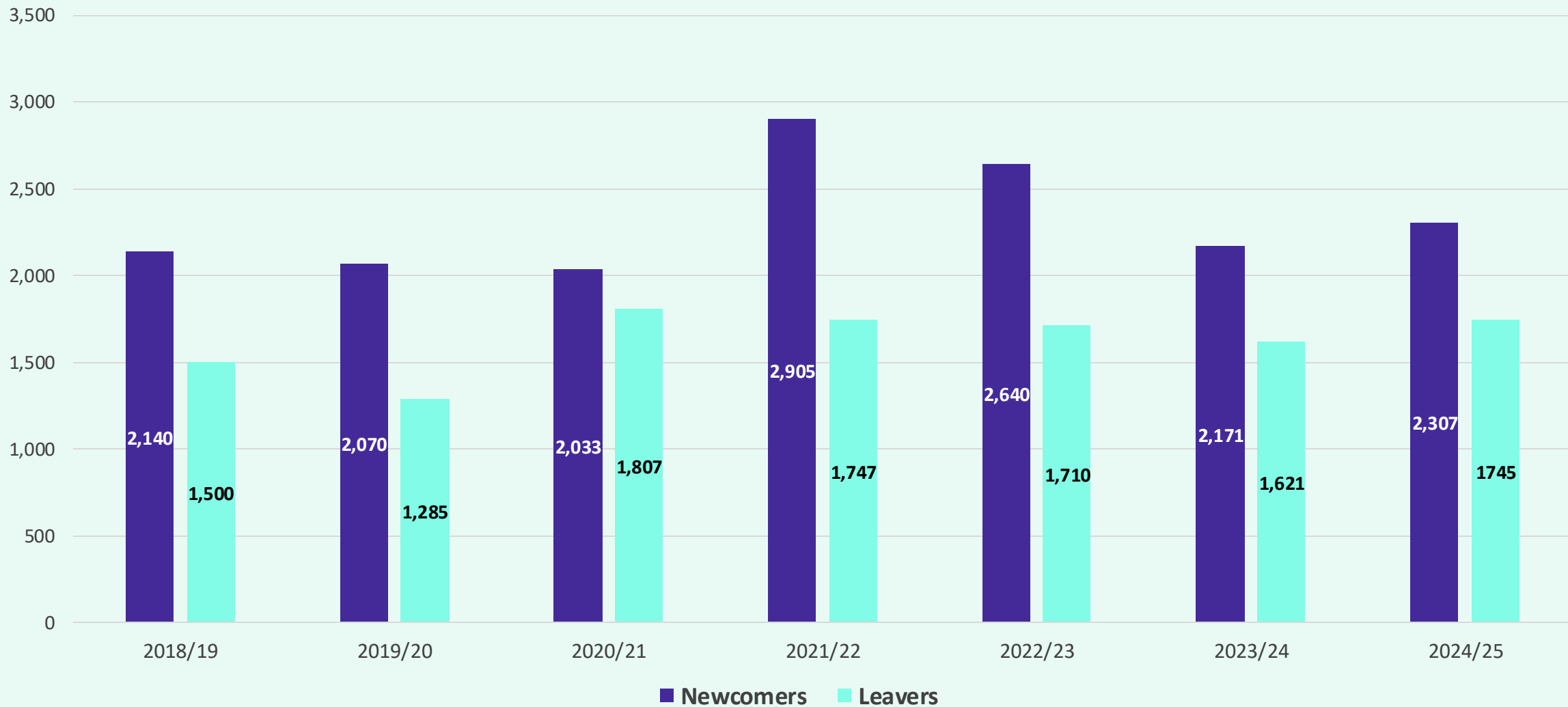
District Multifamily Overview

- There are 1,716 students residing in 5,684 multi-family units across the district
- The overall district multi-family yield is 0.302



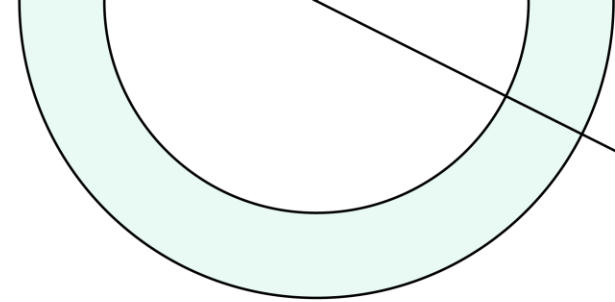


Newcomers and Leavers

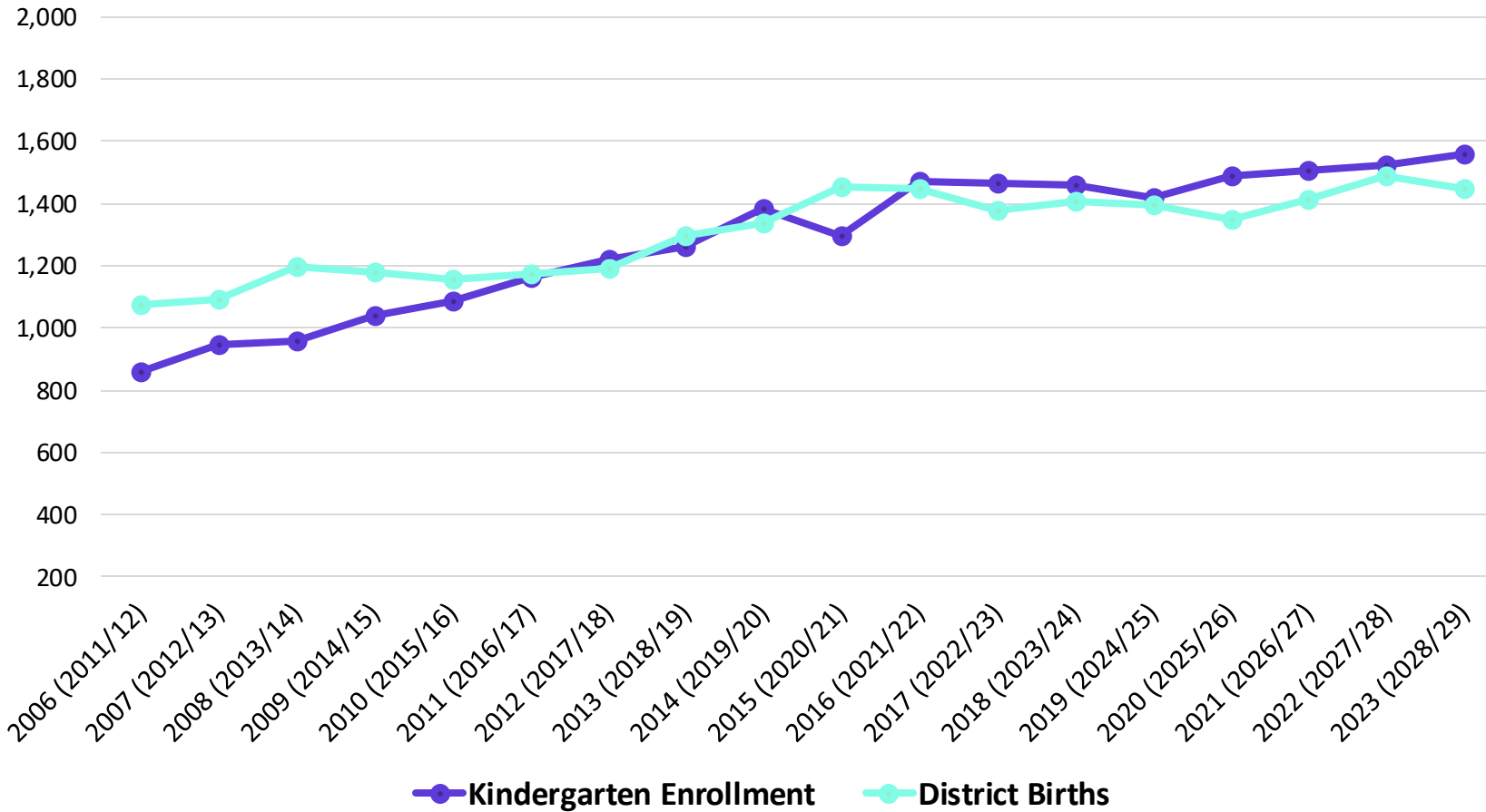




Birth Rates



Tomball ISD KG Enrollment v. District Births



Births (KG Enroll)	District Births	Kindergarten Enrollment	Ratio
2006 (2011/12)	1,072	859	0.801
2007 (2012/13)	1,095	946	0.864
2008 (2013/14)	1,198	956	0.798
2009 (2014/15)	1,181	1,040	0.881
2010 (2015/16)	1,157	1,087	0.939
2011 (2016/17)	1,174	1,162	0.990
2012 (2017/18)	1,189	1,219	1.025
2013 (2018/19)	1,295	1,264	0.976
2014 (2019/20)	1,336	1,382	1.034
2015 (2020/21)	1,455	1,299	0.893
2016 (2021/22)	1,450	1,469	1.013
2017 (2022/23)	1,380	1,465	1.062
2018 (2023/24)	1,407	1,459	1.037
2019 (2024/25)	1,393	1,416	1.017
2020 (2025/26)	1,346	1,490	1.107
2021 (2026/27)	1,415	1,505	1.064
2022 (2027/28)	1,490	1,526	1.024
2023 (2028/29)	1,449	1,561	1.077



Annual Enrollment Change

Year (Oct.)	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Growth	% Growth
2020/21	61	205	1,299	1,455	1,448	1,451	1,459	1,452	1,559	1,510	1,471	1,488	1,316	1,257	1,236	18,667		
2021/22	119	310	1,469	1,520	1,553	1,599	1,585	1,551	1,564	1,661	1,628	1,621	1,484	1,293	1,295	20,252	1,585	8.5%
2022/23	109	327	1,465	1,633	1,626	1,669	1,716	1,671	1,701	1,658	1,733	1,715	1,619	1,501	1,303	21,446	1,194	5.9%
2023/24	127	314	1,459	1,560	1,723	1,679	1,751	1,765	1,749	1,764	1,727	1,816	1,720	1,563	1,498	22,215	769	3.6%
2024/25	295	394	1,416	1,583	1,602	1,777	1,723	1,807	1,847	1,811	1,823	1,789	1,826	1,672	1,558	22,923	708	3.2%

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

2024/25

Proj.	112	336	1,502	1,560	1,625	1,803	1,753	1,825	1,855	1,841	1,839	1,845	1,827	1,672	1,555	22,950		
	183	58	-86	23	-23	-26	-30	-18	-8	-30	-16	-56	-1	0	3	-27		
			-6.07%	1.45%	-1.44%	-1.46%	-1.74%	-1.00%	-0.43%	-1.66%	-0.88%	-3.13%	-0.05%	0.00%	0.19%	-0.12%		

	EE	PK	KG	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Elem.	Int.	JH	HS	Total
3-year AVG	1.468	0.239	0.988	1.087	1.051	1.046	1.050	1.038	1.063	1.044	1.039	1.046	1.002	0.983	1.001	1.044	1.051	1.042	1.008	1.034
2021/22	1.951	0.211	1.131	1.170	1.067	1.104	1.092	1.063	1.077	1.065	1.078	1.102	0.997	0.983	1.030	1.113	1.070	1.072	1.028	1.074
2022/23	0.916	0.223	0.997	1.112	1.070	1.075	1.073	1.054	1.097	1.060	1.043	1.053	0.999	1.011	1.008	1.065	1.075	1.052	1.018	1.050
2023/24	1.165	0.216	0.996	1.065	1.055	1.033	1.049	1.029	1.047	1.037	1.042	1.048	1.003	0.965	0.998	1.040	1.038	1.039	1.004	1.028
2024/25	2.323	0.278	0.971	1.085	1.027	1.031	1.026	1.032	1.046	1.035	1.033	1.036	1.006	0.972	0.997	1.028	1.039	1.034	1.003	1.023



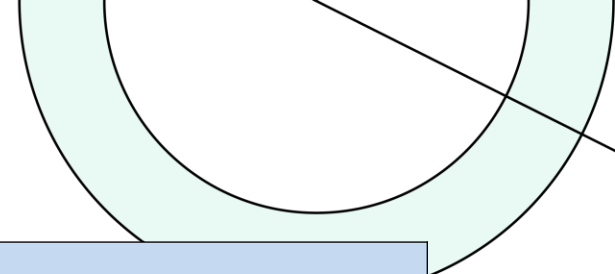
Ten Year Forecast by Grade Level

Year (Oct.)	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Growth	% Growth
2020/21	61	205	1,299	1,455	1,448	1,451	1,459	1,452	1,559	1,510	1,471	1,488	1,316	1,257	1,236	18,667		
2021/22	119	310	1,469	1,520	1,553	1,599	1,585	1,551	1,564	1,661	1,628	1,621	1,484	1,293	1,295	20,252	1,585	8.5%
2022/23	109	327	1,465	1,633	1,626	1,669	1,716	1,671	1,701	1,658	1,733	1,715	1,619	1,501	1,303	21,446	1,194	5.9%
2023/24	127	314	1,459	1,560	1,723	1,679	1,751	1,765	1,749	1,764	1,727	1,816	1,720	1,563	1,498	22,215	769	3.6%
2024/25	295	394	1,416	1,583	1,602	1,777	1,723	1,807	1,847	1,811	1,823	1,789	1,826	1,672	1,558	22,923	708	3.2%
2025/26	287	388	1,446	1,525	1,635	1,659	1,827	1,778	1,881	1,903	1,852	1,897	1,786	1,785	1,679	23,328	405	1.8%
2026/27	287	392	1,461	1,564	1,580	1,689	1,710	1,883	1,859	1,971	1,963	1,945	1,900	1,754	1,787	23,745	416	1.8%
2027/28	287	408	1,482	1,579	1,614	1,638	1,740	1,763	1,970	1,916	2,018	2,048	1,954	1,867	1,752	24,036	291	1.2%
2028/29	287	424	1,516	1,595	1,622	1,662	1,693	1,793	1,851	2,033	1,974	2,074	2,053	1,917	1,867	24,361	325	1.4%
2029/30	287	434	1,543	1,632	1,630	1,669	1,710	1,752	1,861	1,919	2,097	2,040	2,068	2,015	1,912	24,569	209	0.9%
2030/31	287	449	1,578	1,660	1,675	1,685	1,724	1,769	1,812	1,924	1,982	2,177	2,040	2,055	2,013	24,830	260	1.1%
2031/32	287	462	1,606	1,699	1,703	1,732	1,741	1,789	1,854	1,872	1,989	2,054	2,189	1,984	2,052	25,013	183	0.7%
2032/33	287	477	1,632	1,725	1,740	1,758	1,785	1,815	1,872	1,915	1,934	2,041	2,063	2,122	1,980	25,146	133	0.5%
2033/34	287	491	1,658	1,753	1,768	1,788	1,814	1,858	1,900	1,924	1,979	1,991	2,062	2,041	2,132	25,446	300	1.2%
2034/35	287	506	1,688	1,781	1,796	1,817	1,846	1,886	1,947	1,969	1,990	2,038	2,007	2,021	2,030	25,609	163	0.6%

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



Ten Year Forecast by Elementary Campus



Campus	Full	85%	HISTORY	Fall	ENROLLMENT PROJECTIONS									
	Capacity	Capacity	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35
Early Excellence Academy (PK)			244	219	224	237	246	252	262	270	276	284	291	299
Canyon Pointe Elementary (KG-4th)	856	728	759	829	812	789	797	791	784	785	784	784	783	782
Creekside Forrest (KG-5th)	714	607	695	676	639	499	485	467	483	489	499	512	522	531
Creekview Elementary (KG-5th)	920	782	907	937	921	710	683	690	688	689	695	702	708	713
Decker Prairie Elementary (KG-4th)	856	728	706	643	645	649	663	658	686	708	732	756	777	799
Grand Oak Elementary (KG-4th)	920	782	983	548	584	621	697	747	814	893	979	1,054	1,132	1,218
Lakewood Elementary (KG-4th)	886	753	746	756	732	707	690	685	683	684	696	705	712	721
Rosehill Elementary (KG-4th)	866	736	678	751	789	838	865	893	875	882	889	892	900	907
Timber Creek Elementary (KG-5th)	920	782	955	970	972	822	809	811	799	800	800	805	808	812
Tomball Elementary (KG-4th)	866	736	776	668	674	691	716	714	730	751	764	775	784	788
West Elementary (KG-4th)	1,080	918		741	752	717	731	739	735	735	733	735	733	732
Wildwood Elementary (KG-4th)	920	782	875	819	815	794	788	779	778	779	782	788	790	793
Willow Creek Elementary (KG-4th)	866	736	720	687	648	608	579	574	589	593	601	612	618	626
ELEMENTARY SCHOOL TOTALS	10,670	9,070	9,044	9,244	9,206	8,683	8,748	8,799	8,905	9,058	9,230	9,404	9,559	9,721
Elementary Absolute Growth			89	200	-38	-524	65	51	107	152	172	174	155	162
Elementary Percent Growth			1.00%	2.21%	-0.41%	-5.69%	0.75%	0.58%	1.21%	1.71%	1.90%	1.88%	1.65%	1.70%



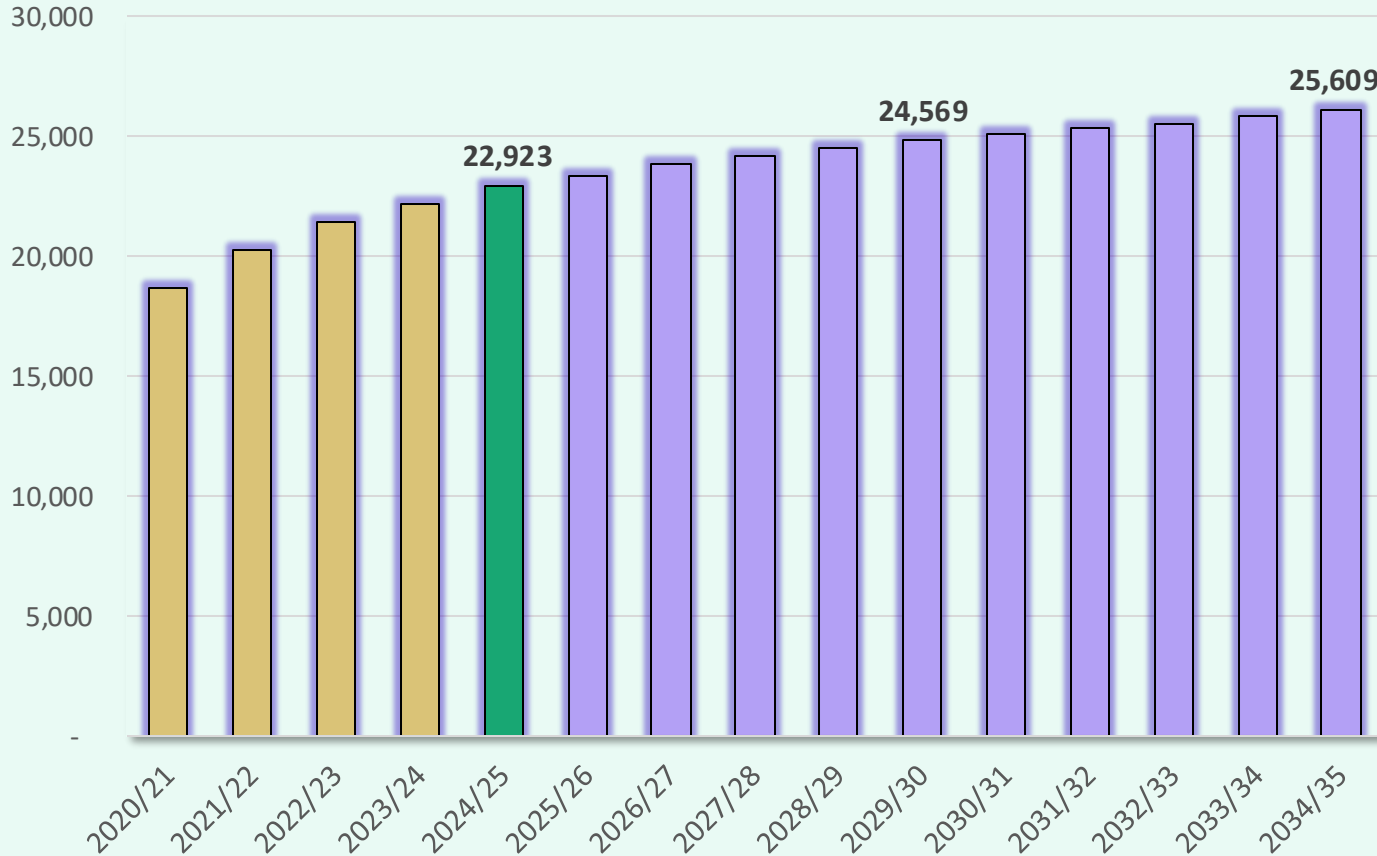
Ten Year Forecast by Secondary Campus

Campus	Full	85%	HISTORY	Fall	ENROLLMENT PROJECTIONS									
	Capacity	Capacity	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35
Northpointe Intermediate (5th-6th)	1,011		788	769	839	896	870	818	752	732	745	731	743	755
Oakcrest Intermediate (5th-6th)	920		826	815	726	688	655	623	641	632	634	637	633	634
Tomball Intermediate (5th-6th)	1,063		1,061	1,180	603	642	658	685	675	645	679	699	728	759
West Intermediate (5th-6th)	900				598	606	611	613	657	687	704	723	747	769
INTERMEDIATE SCHOOL TOTALS	3,894		2,675	2,764	2,766	2,832	2,794	2,739	2,725	2,696	2,762	2,790	2,851	2,917
Intermediate Absolute Growth			124	89	2	66	-38	-55	-14	-29	66	28	61	66
Intermediate Percent Growth			4.86%	3.33%	0.07%	2.39%	-1.34%	-1.97%	-0.51%	-1.06%	2.45%	1.01%	2.19%	2.31%
Creekside Park Junior High (6th-8th)	1,500		1,167	1,221	1,232	1,725	1,759	1,734	1,724	1,698	1,674	1,670	1,668	1,687
Grand Lakes Junior High (7th-8th)	1,500		980	1,016	835	1,000	1,264	1,228	1,227	1,195	1,256	1,298	1,316	1,345
Tomball Junior High (7th-8th)	1,256		908	949	1,098	976	655	694	723	747	735	713	748	774
Willow Wood Junior High (7th-8th)	1,186		844	884	1,044	1,143	1,195	1,256	1,230	1,151	1,077	1,065	1,078	1,069
JUNIOR HIGH TOTALS	5,442		3,899	4,070	4,209	4,844	4,873	4,912	4,904	4,791	4,742	4,746	4,810	4,875
Junior High Absolute Growth			97	171	139	635	29	39	-8	-113	-49	4	64	65
Junior High Percent Growth			2.55%	4.39%	3.42%	15.09%	0.60%	0.80%	-0.16%	-2.30%	-1.02%	0.08%	1.35%	1.35%
Tomball Memorial High School (9th-12th)	3,000		3,149	3,213	3,320	3,196	3,069	3,035	3,028	2,992	2,944	2,758	2,745	2,676
Tomball High School (9th-12th)	3,611		3,081	3,230	3,419	2,950	2,804	2,498	2,541	2,719	2,725	2,931	2,931	2,868
Tomball West High School (9th-12th)					820	1,332	1,975	2,082	2,209	2,268	2,202	2,262	2,292	
Tomball Star Academy (9th-12th)			367	402	408	420	416	403	384	365	342	315	288	260
HIGH SCHOOL TOTALS	3,611		6,597	6,845	7,147	7,386	7,621	7,911	8,035	8,285	8,279	8,206	8,226	8,096
High School Absolute growth			459	248	302	239	235	290	124	250	-6	-73	20	-130
High School Percent Growth			7.48%	3.76%	4.41%	3.34%	3.18%	3.81%	1.57%	3.11%	-0.07%	-0.88%	0.24%	-1.58%
DISTRICT TOTALS	23,617		22,215	22,923	23,328	23,745	24,036	24,361	24,569	24,830	25,013	25,146	25,446	25,609
District Absolute Growth			769	708	405	416	291	325	209	260	183	133	300	163
District Percent Growth			3.6%	3.2%	1.8%	1.8%	1.2%	1.4%	0.9%	1.1%	0.7%	0.5%	1.2%	0.6%



Key Takeaways

Enrollment Forecast



- New home starts within TISD are down approximately 15% YTD versus last year, however, new home closings are keeping pace over the same time period
- The district has 33 actively building subdivisions with appx 1,235 lots available to build on
- TISD has 15 future subdivisions with nearly 4,200 lots in the planning stages
- Groundwork is currently underway on appx. 80 lots within one subdivision
- Tomball ISD is forecasted to enroll roughly 24,569 students in 2029/30 and more than 25,600 by 2034/35