



# KATY ISD

## DEMOGRAPHIC STUDY

November 14, 2022

POPULATION AND SURVEY ANALYSTS  
[WWW.PASATX.COM](http://WWW.PASATX.COM)

# DEMOGRAPHIC TRENDS

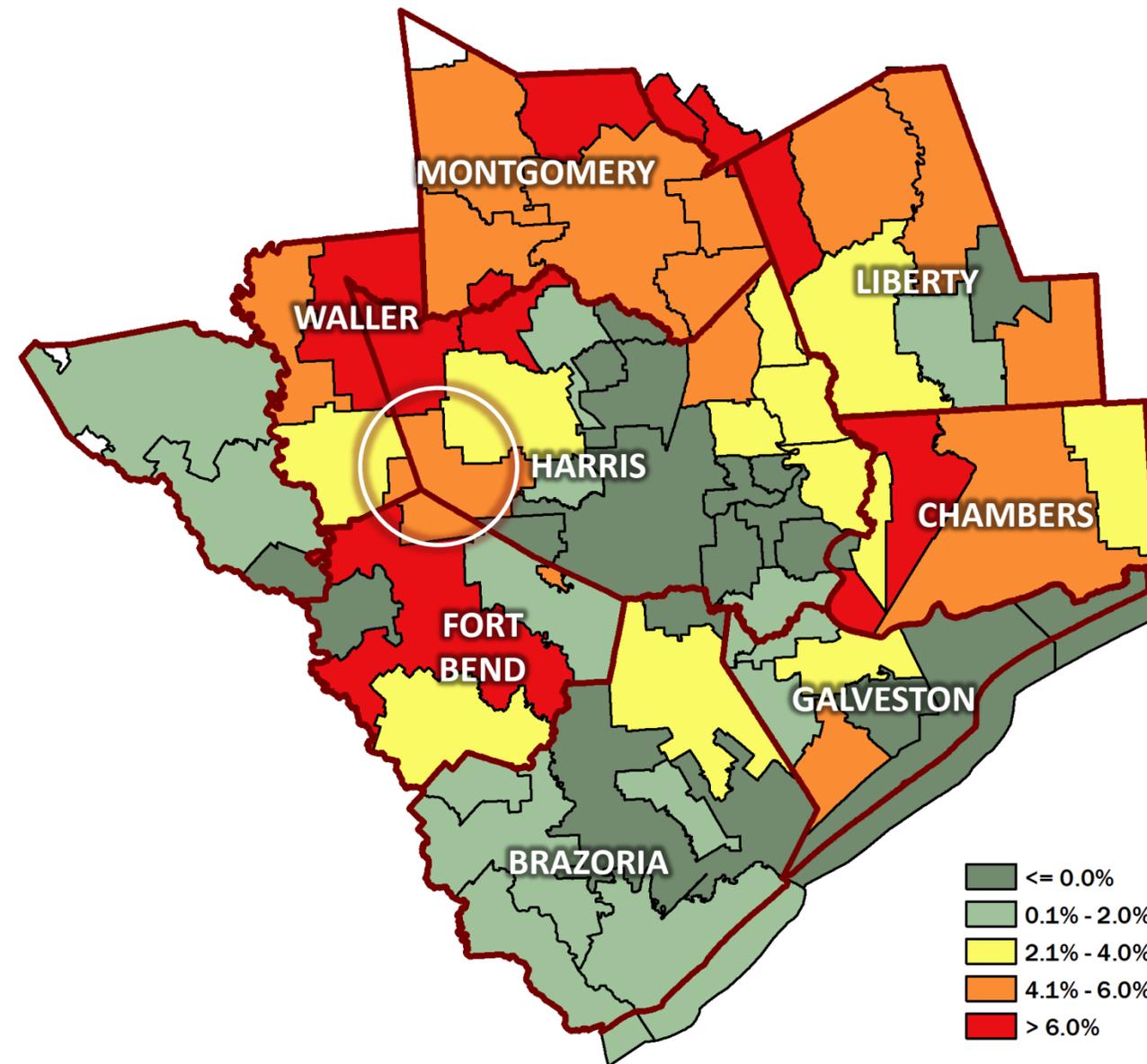


# Percent Change in Enrollment

Fall 2020 – Fall 2021



	School District	Change
1	Cleveland ISD	22.2%
2	Tomball ISD	8.6%
3	Lamar CISD	8.4%
4	Waller ISD	8.0%
5	Willis ISD	7.0%
6	Barbers Hill ISD	6.1%
7	Stafford MSD	5.9%
8	Humble ISD	5.7%
9	Devers ISD	5.4%
10	Anahuac ISD	5.4%
11	Tarkington ISD	5.3%
12	New Caney ISD	5.2%
13	Splendora ISD	5.1%
14	<b>Katy ISD</b>	<b>5.0%</b>
15	Hempstead ISD	5.0%
16	Conroe ISD	5.0%

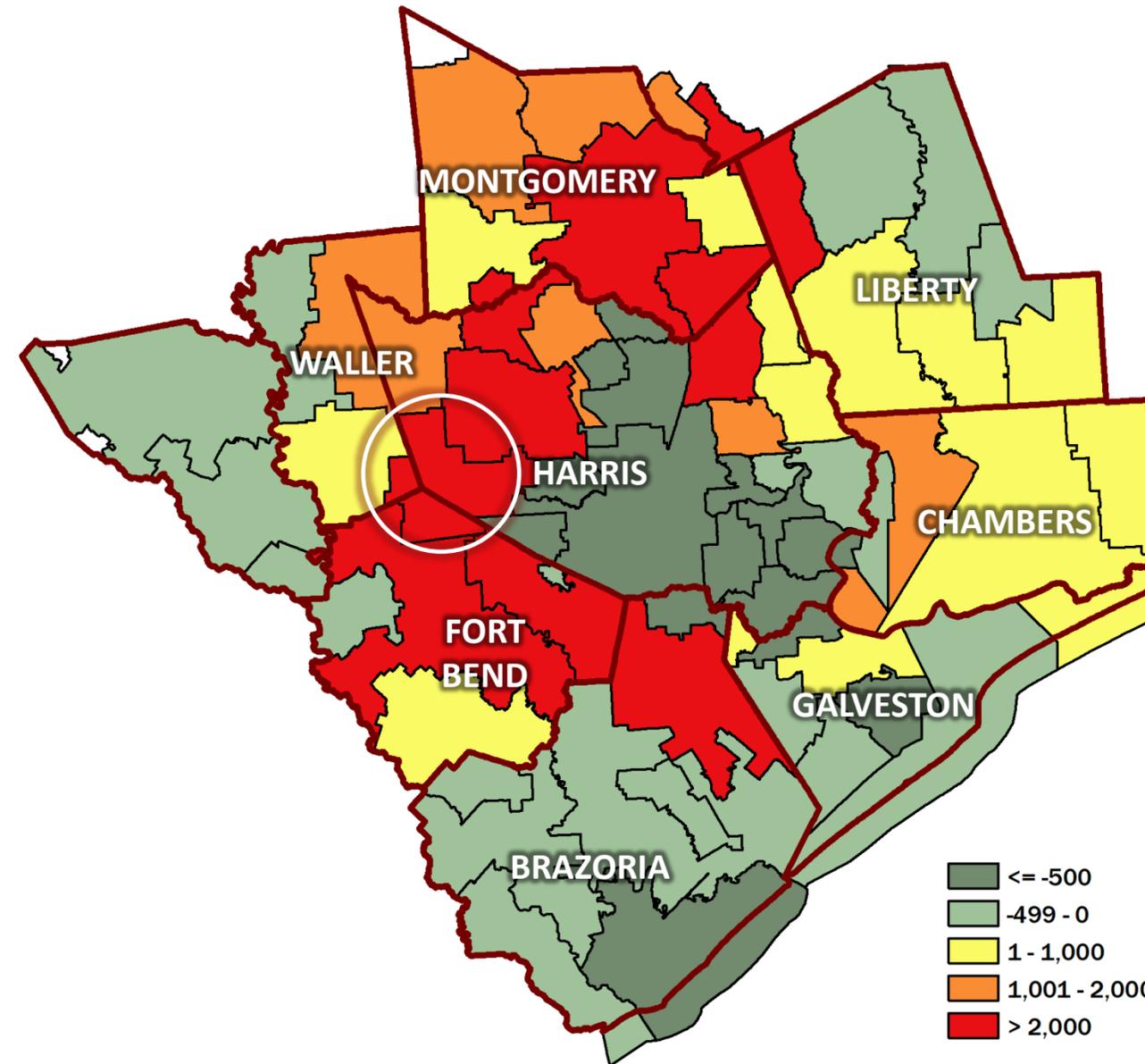


# Numeric Change in Enrollment

Fall 2016 – Fall 2021



	School District	Change
1	Katy ISD	12,940
2	Lamar CISD	8,750
3	Conroe ISD	7,997
4	Humble ISD	6,888
5	Cleveland ISD	6,132
6	Tomball ISD	5,330
7	Alvin ISD	4,498
8	Fort Bend ISD	3,399
9	New Caney ISD	2,439
10	Cy-Fair ISD	2,349
11	Sheldon ISD	1,686
12	Barbers Hill ISD	1,552
13	Waller ISD	1,512
14	Klein ISD	1,484
15	Willis ISD	1,121

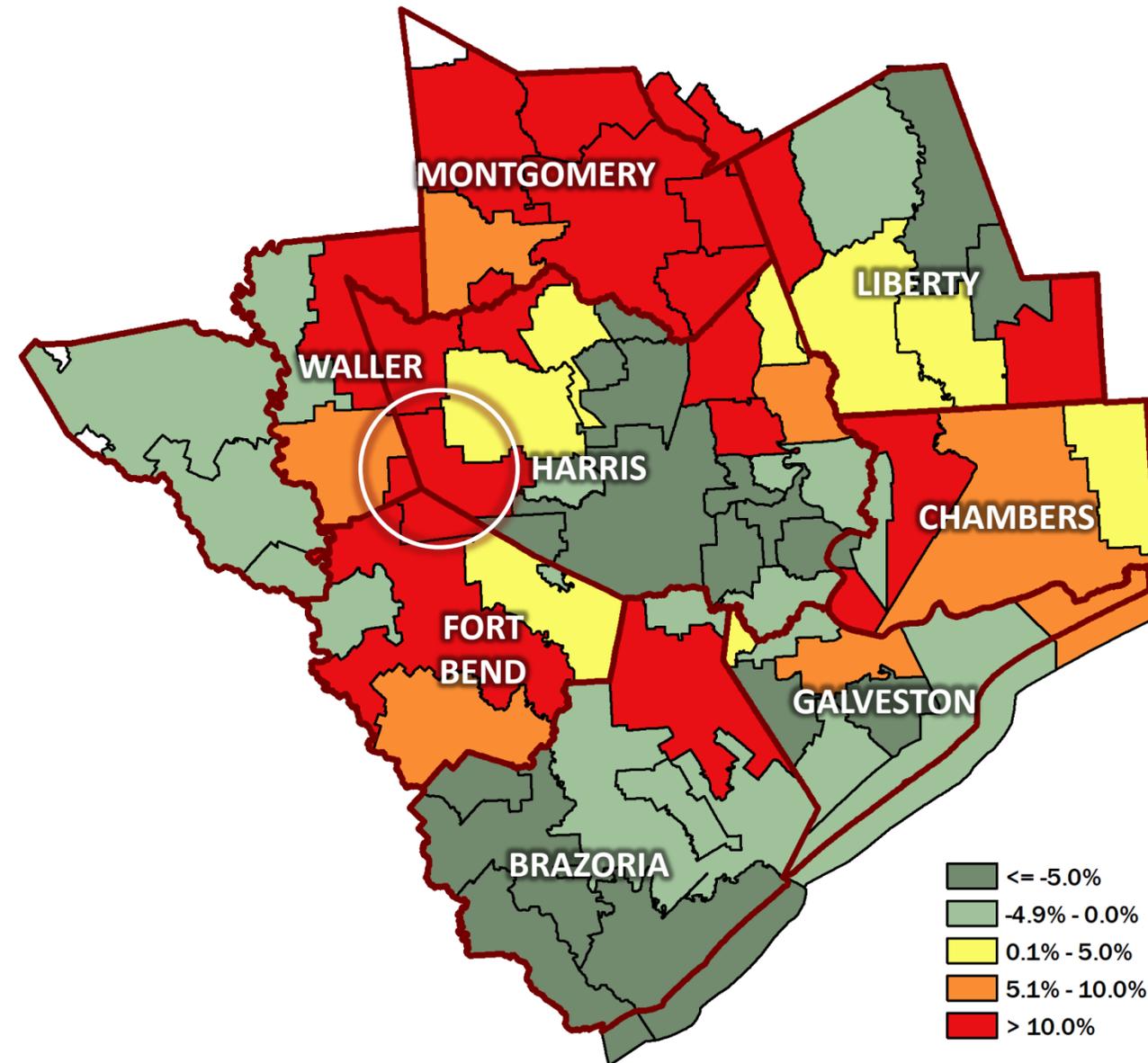


# Percent Change in Enrollment

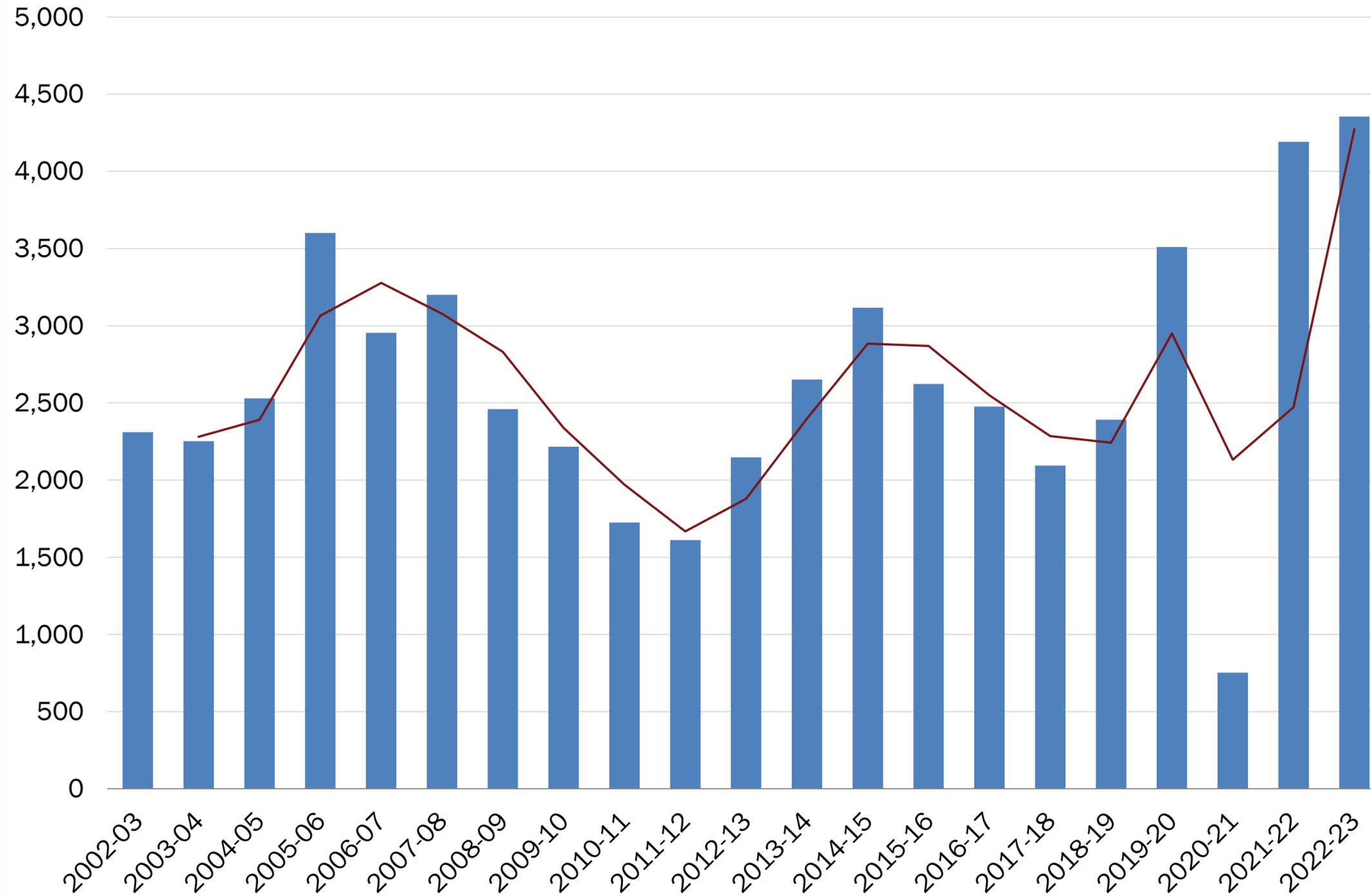
Fall 2016 – Fall 2021



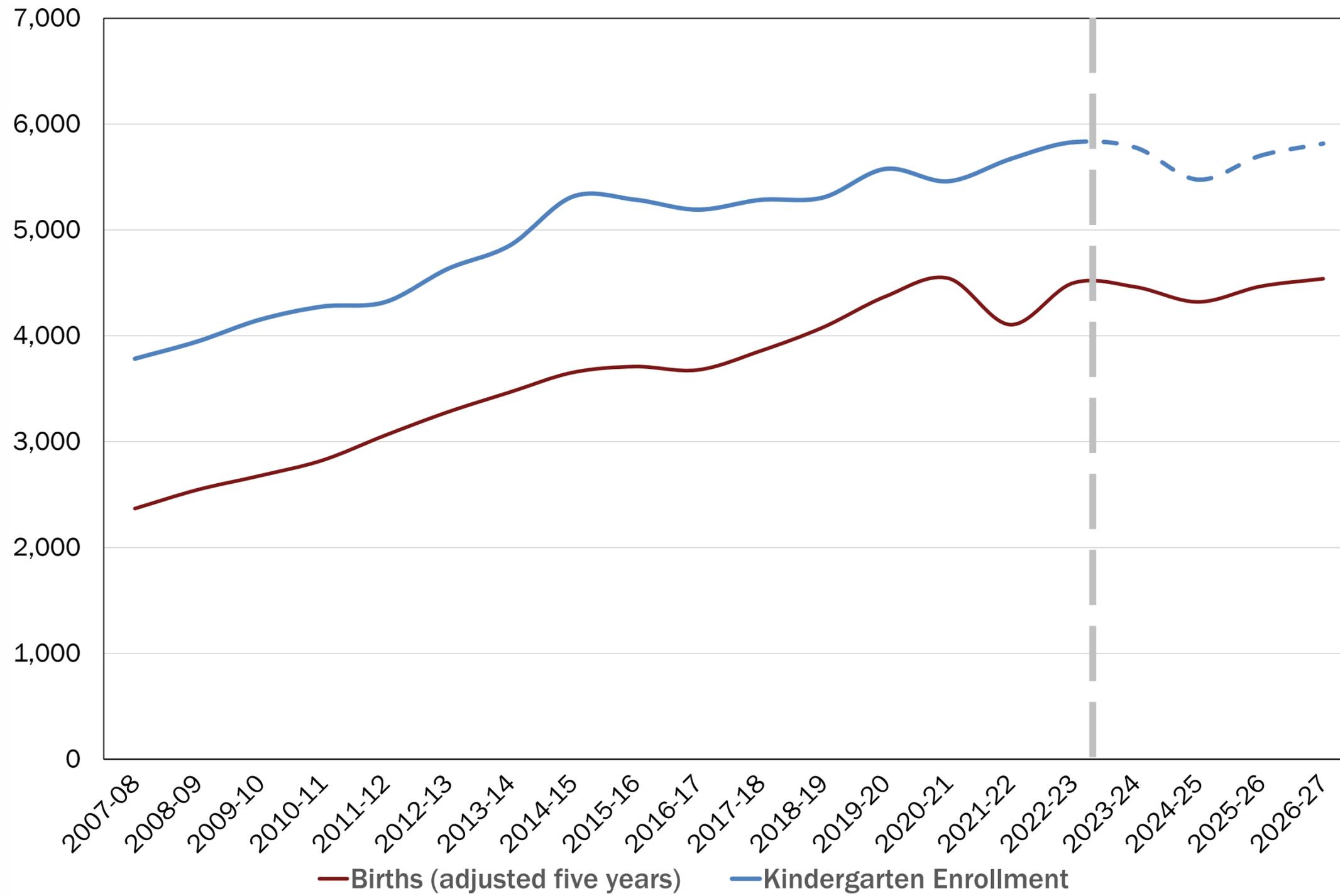
	School District	Change
1	Cleveland ISD	56.5%
2	Tomball ISD	26.3%
3	Barbers Hill ISD	22.8%
4	Lamar CISD	22.1%
5	Waller ISD	18.0%
6	Alvin ISD	16.0%
7	Sheldon ISD	16.0%
8	Devers ISD	15.7%
9	<b>Katy ISD</b>	<b>14.6%</b>
10	Humble ISD	14.3%
11	New Caney ISD	14.2%
12	Willis ISD	13.3%
13	Conroe ISD	11.8%
14	Splendora ISD	11.4%
15	Montgomery ISD	11.2%



# Total Enrollment Change



# KG Enrollment vs. Live Births



# CURRENT STUDENTS



# Students per Household



Single-Family



0.72

Multi-Family

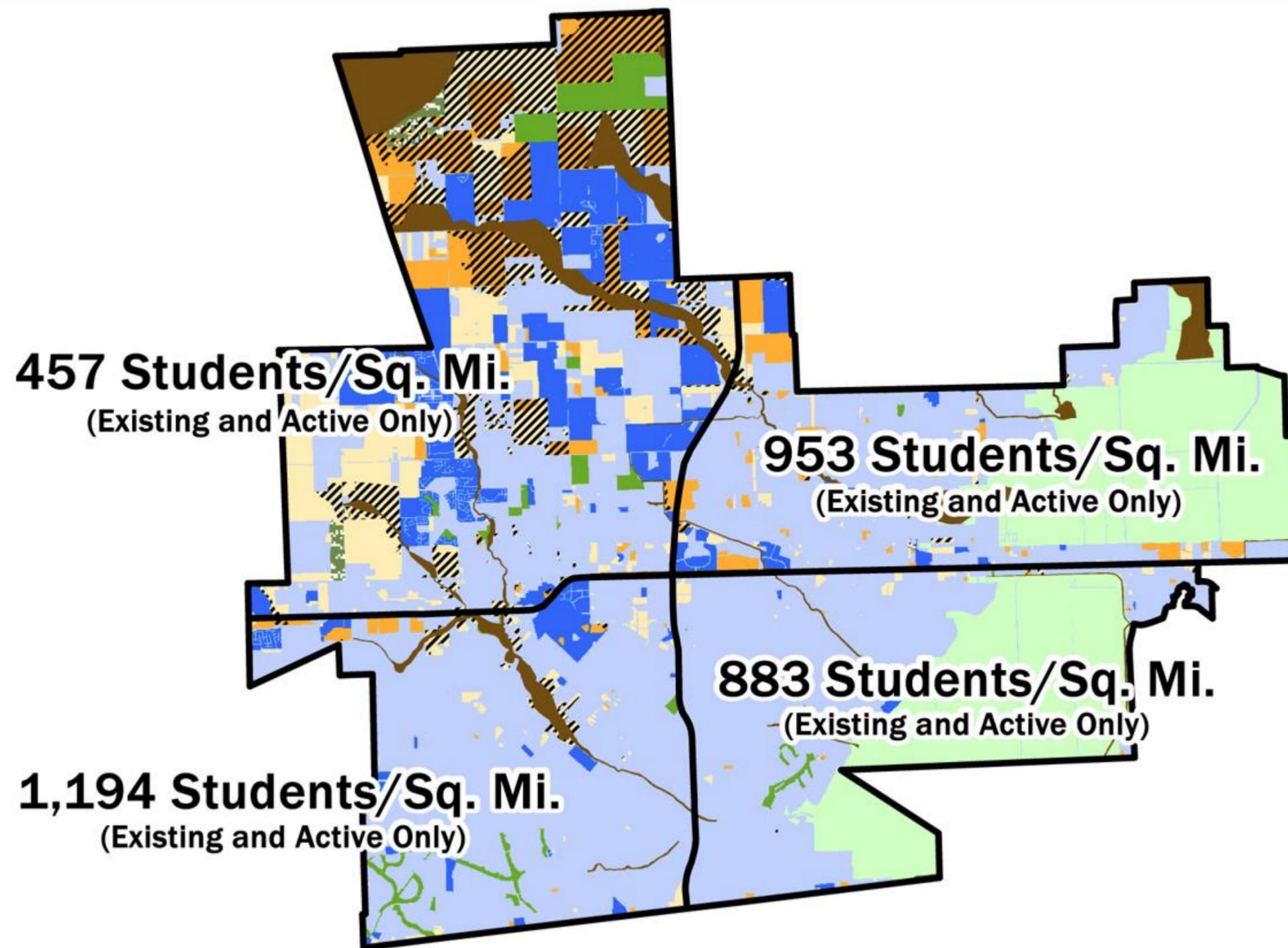


0.37

# Development Density

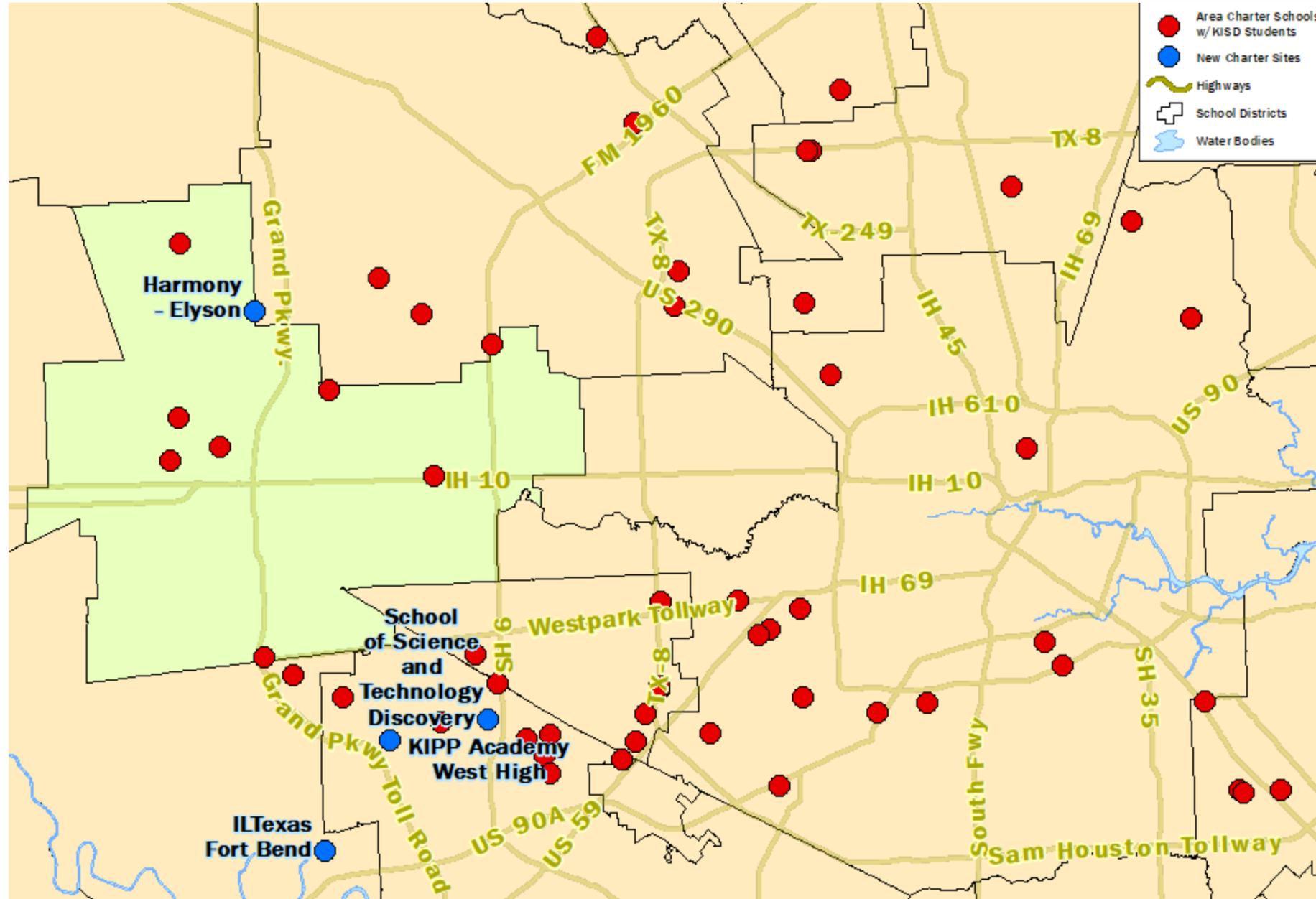


Proportion of Students by Quadrant



# Charter Schools

Impacting Katy ISD



Katy ISD Boundary

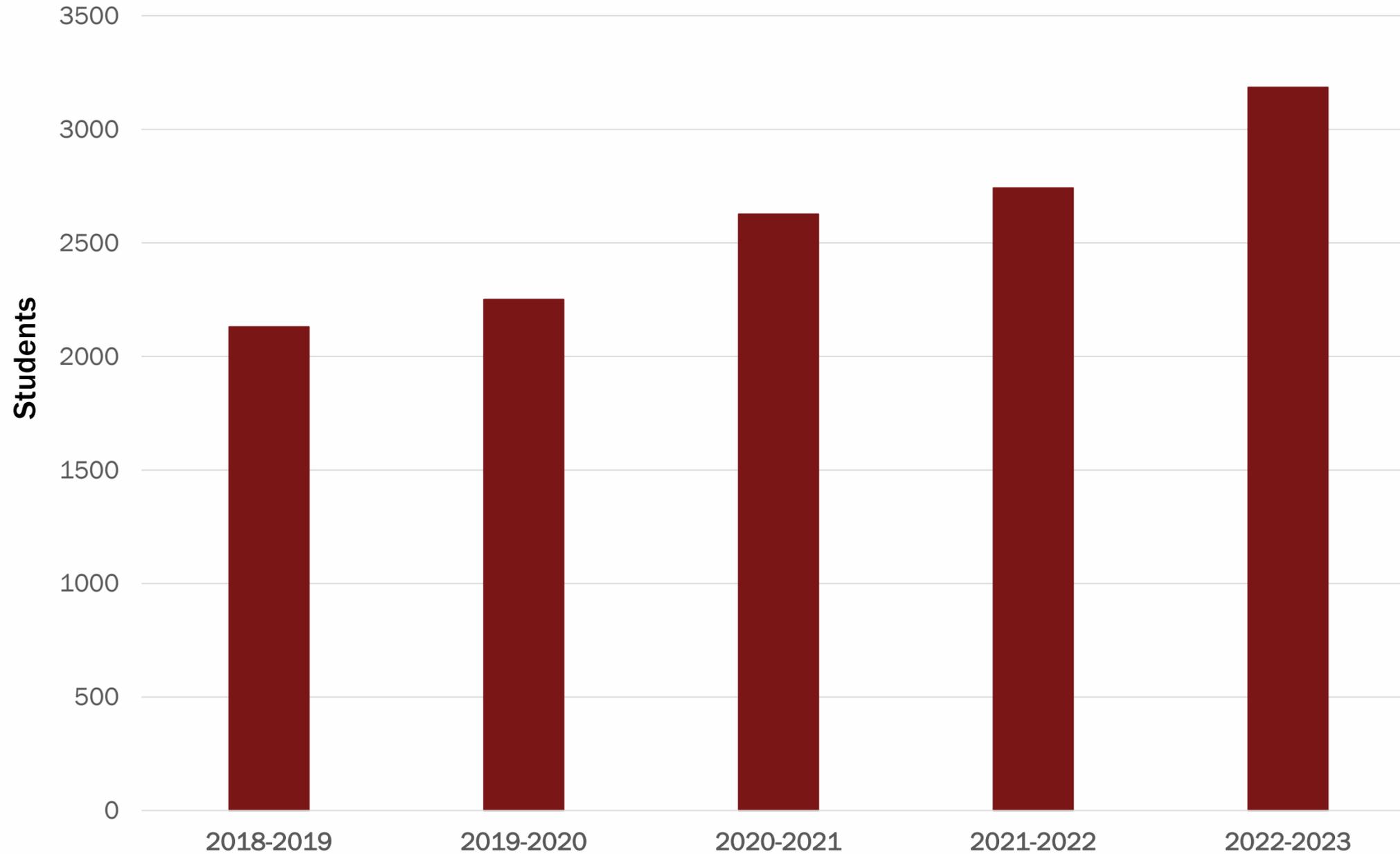
Sources: Texas Education Agency (TEA) and PASA surveys; TEA hides enrollments <10 due to FERPA privacy regulations. PASA estimated students per school in this situation. New campuses or schools enrolling >50 residents from this school district last fall were contacted by PASA to understand projected enrollment in five years. All other schools' projected enrollment equals last fall's enrollment.

# Charter Schools

Impacting Katy ISD



KISD Students Attending Charters



Sources: Texas Education Agency (TEA) and PASA surveys; TEA hides enrollments <10 due to FERPA privacy regulations. PASA estimated students per school in this situation. New campuses or schools enrolling >50 residents from this school district last fall were contacted by PASA to understand projected enrollment in five years. All other schools' projected enrollment equals last fall's enrollment.

# ECONOMY



# Economy & Housing Market



## 01 Employment

- MSA workforce recovered to its pre-Pandemic size by April 2022
- Job growth in the greater Houston MSA is strengthening, but still hasn't recovered in all sectors

## 02 Economic Outlook

- Inflation, consumer confidence, and fears of a looming recession are shaping the 2022 economy
- The Federal Reserve has now raised interest rates six times since March and is expected to continue raising rates until inflation is under control
- The National average for a 30-year fixed rate mortgage is now over 7%, more than double a year ago, making home ownership unattainable for certain potential buyers

## 03 Housing Market

- Robust in late 2020 & 2021, due to lower interest rates, record prices, and high demand
- Now market is cooling
  - Permits and sales have slowed since early 2022
  - Prices are depreciating
  - Inventories are on the rise

# HOUSING



# Single-Family Housing

Over the next 10 years, PASA projects 27,681 single-family units (~60% of total new housing projections). These occupancies are predominately in the northwestern quadrant of the district.



## Master Planned Communities

Sunterra, Elyson, and Cane Island lead projected occupancies in the first five years, while development in Bridgeland, Anniston & “Northwest Katy” is projected to pick-up in the latter half of the projection period.

In total, these 6 communities are projected to contribute nearly 50% of single-family projections through 2032.

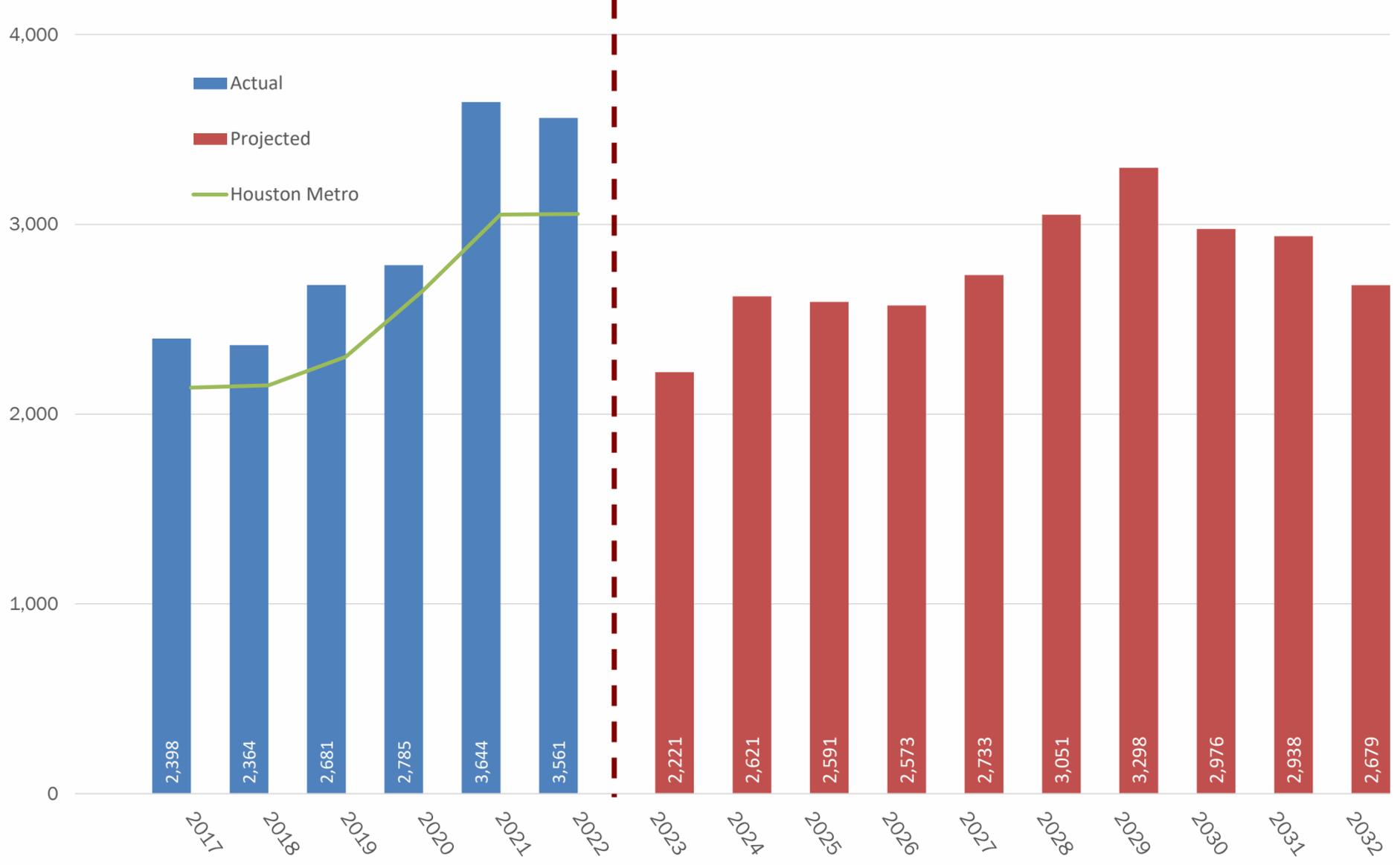
## Manufactured Housing

Two contiguous manufactured housing developments are projected to add over 1,100 occupancies in a single land use zone (3A) over the projection period.

# Past and Projected New Housing Occupancies



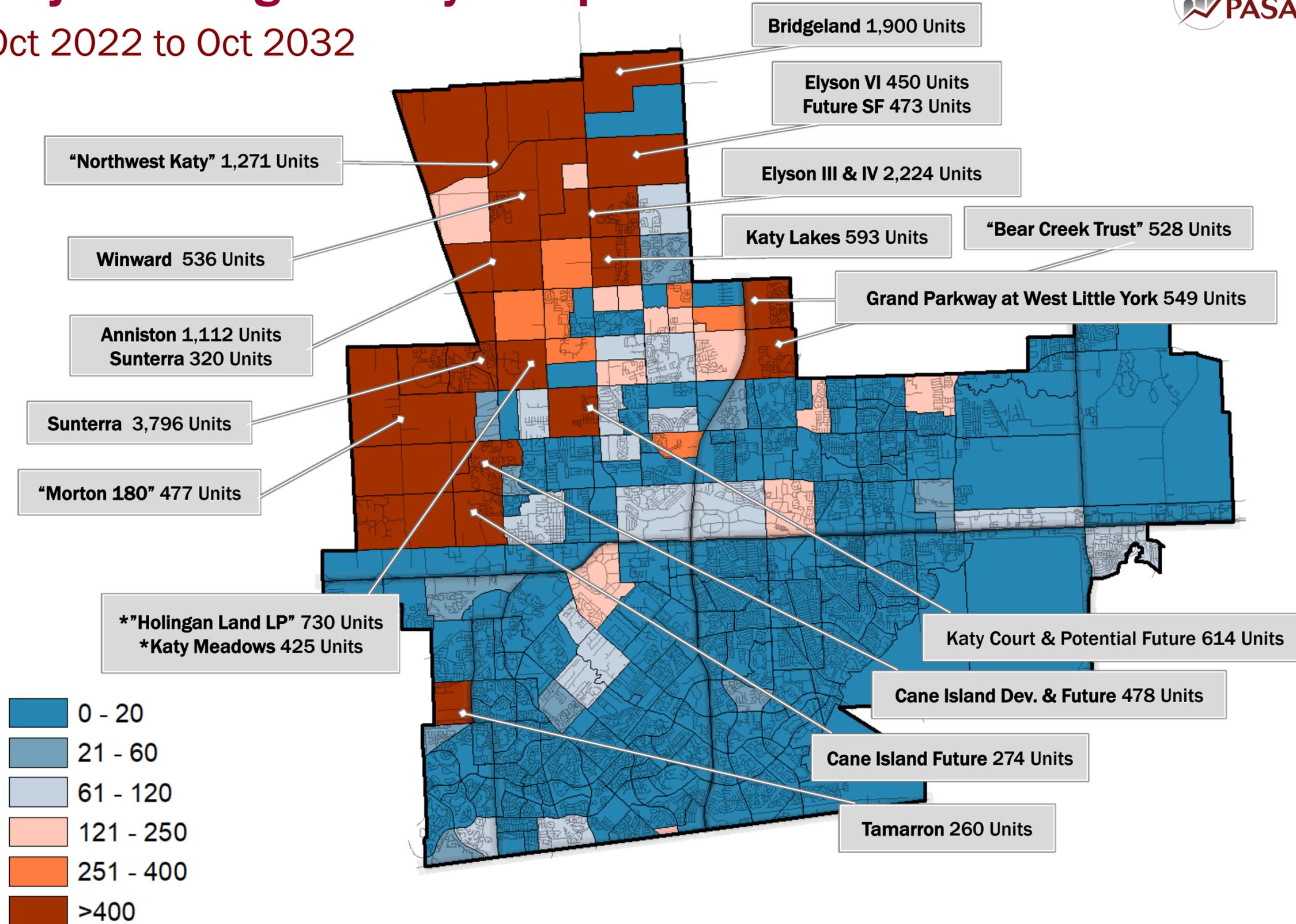
## Single-Family Housing in Katy ISD



Source: Metrostudy Q2 Annual Closings 2017-22; PASA Demographic Study 2022-23

# Projected Single-Family Occupancies

Oct 2022 to Oct 2032



# Multi-Family Housing



*17,071 multi-family occupancies are projected through 2032. This is nearly 37% of total projected new housing. Multi-family occupancies are projected to peak in 2024-2025 with ~2,845 occupancies.*



**~11.9%**

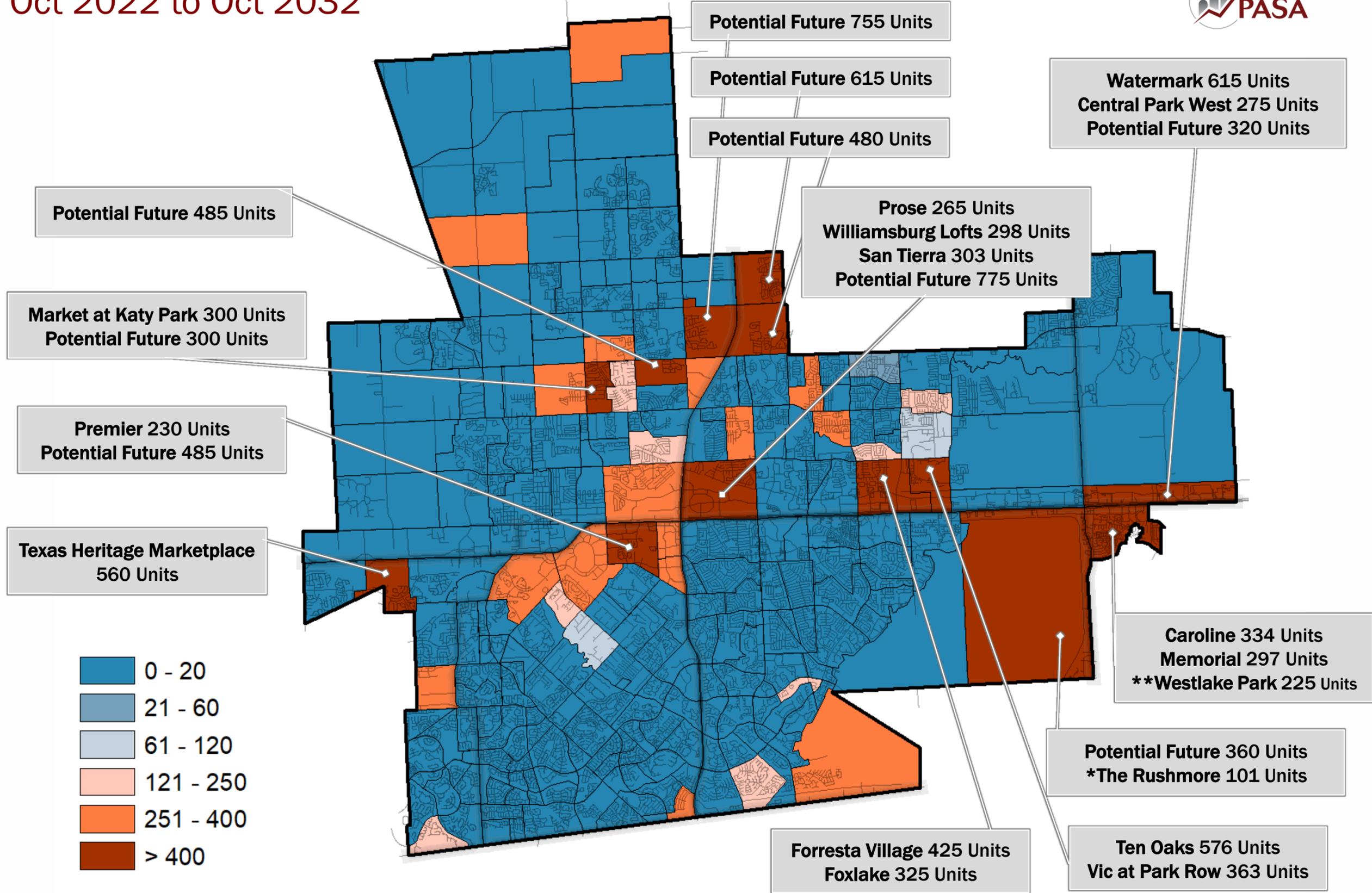
**of current students live in  
Multi-Family units**

**36.9%**

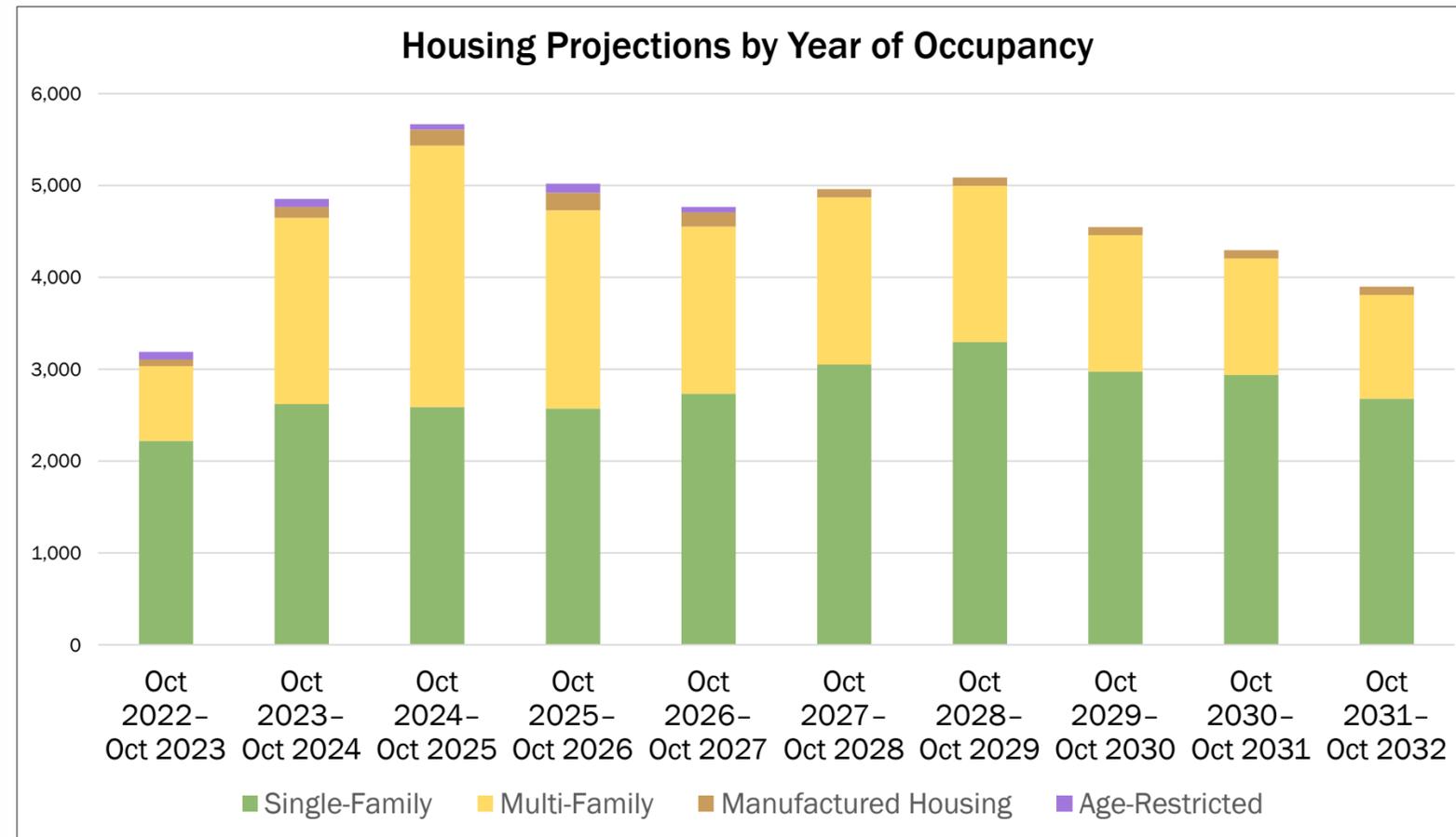
**of all future housing units are  
Multi-Family units**

# Projected Multi-Family Occupancies

Oct 2022 to Oct 2032



# New Housing Projections by Year of Occupancy



Housing Type	Oct 2022- Oct 2023	Oct 2023- Oct 2024	Oct 2024- Oct 2025	Oct 2025- Oct 2026	Oct 2026- Oct 2027	Oct 2027- Oct 2028	Oct 2028- Oct 2029	Oct 2029- Oct 2030	Oct 2030- Oct 2031	Oct 2031- Oct 2032	Oct 2022- Oct 2032
Single-Family	2,221	2,621	2,591	2,573	2,733	3,051	3,298	2,976	2,938	2,679	<b>27,681</b>
Multi-Family	815	2,029	2,845	2,158	1,821	1,820	1,700	1,483	1,270	1,130	<b>17,071</b>
Manufactured Housing	69	118	173	191	154	90	90	90	90	90	<b>1,155</b>
Age-Restricted	85	87	60	100	60	0	0	0	0	0	<b>392</b>
<b>Total</b>	<b>3,190</b>	<b>4,855</b>	<b>5,669</b>	<b>5,022</b>	<b>4,768</b>	<b>4,961</b>	<b>5,088</b>	<b>4,549</b>	<b>4,298</b>	<b>3,899</b>	<b>46,299</b>

# STUDENT PROJECTIONS



# Factors Incorporated into Short-Term Projections (Fall 2027)



**92,724** October 2022

**102,365** Low Growth

- Birth rates do not increase, low KG growth
- Increasing interest rates
- 2-3 larger charters opening in or near KISD

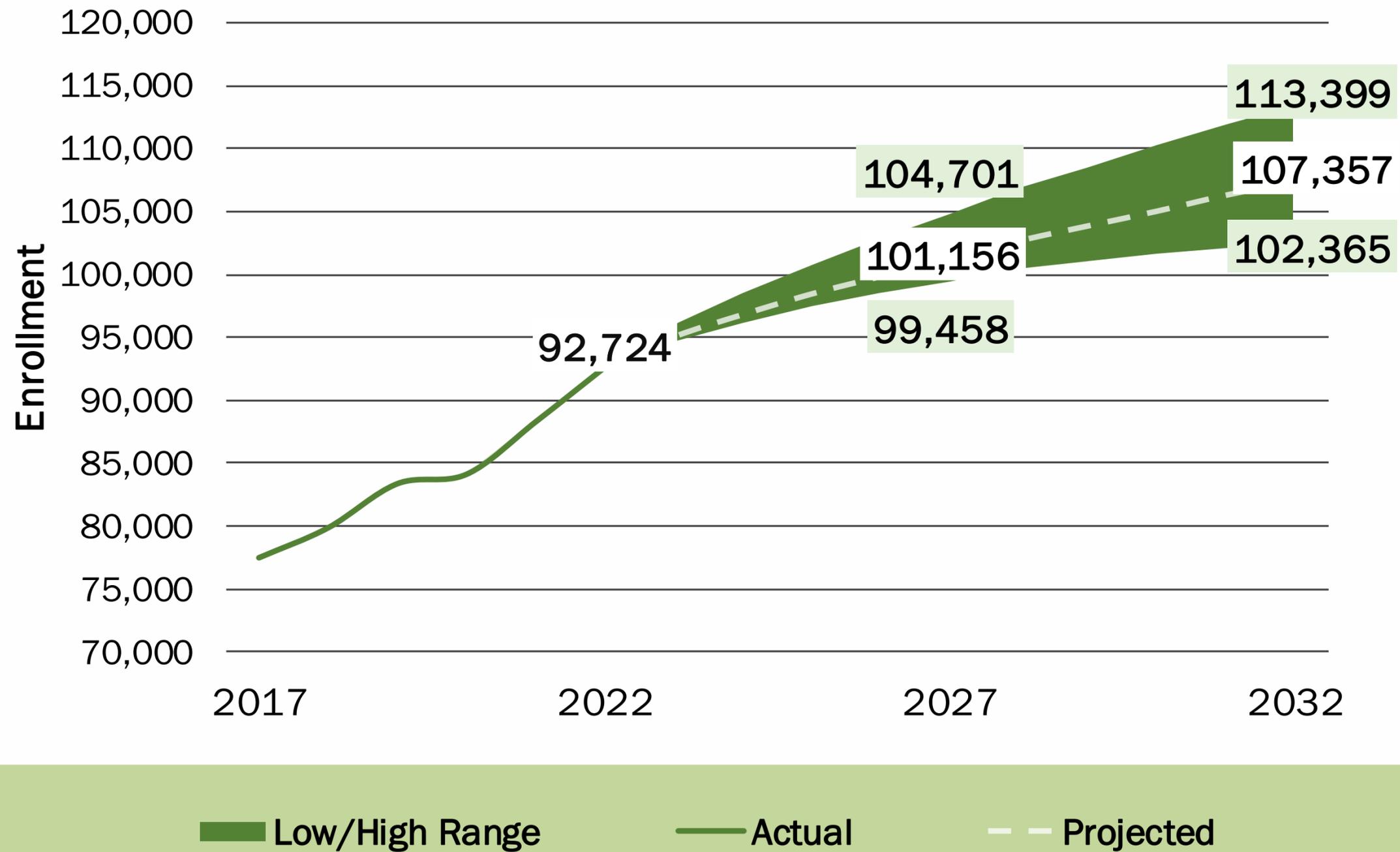
**107,357** Moderate Growth

- KG growth, but fairly low
- Mortgage rates do not rise over 6.5-7%
- Short-term pause in building

**113,399** High Growth

- Stable interest rates
- No major charters in around KISD in the next 5 years
- Faster growth in the NW

# Three Scenarios of Growth



# Moderate Growth Scenario



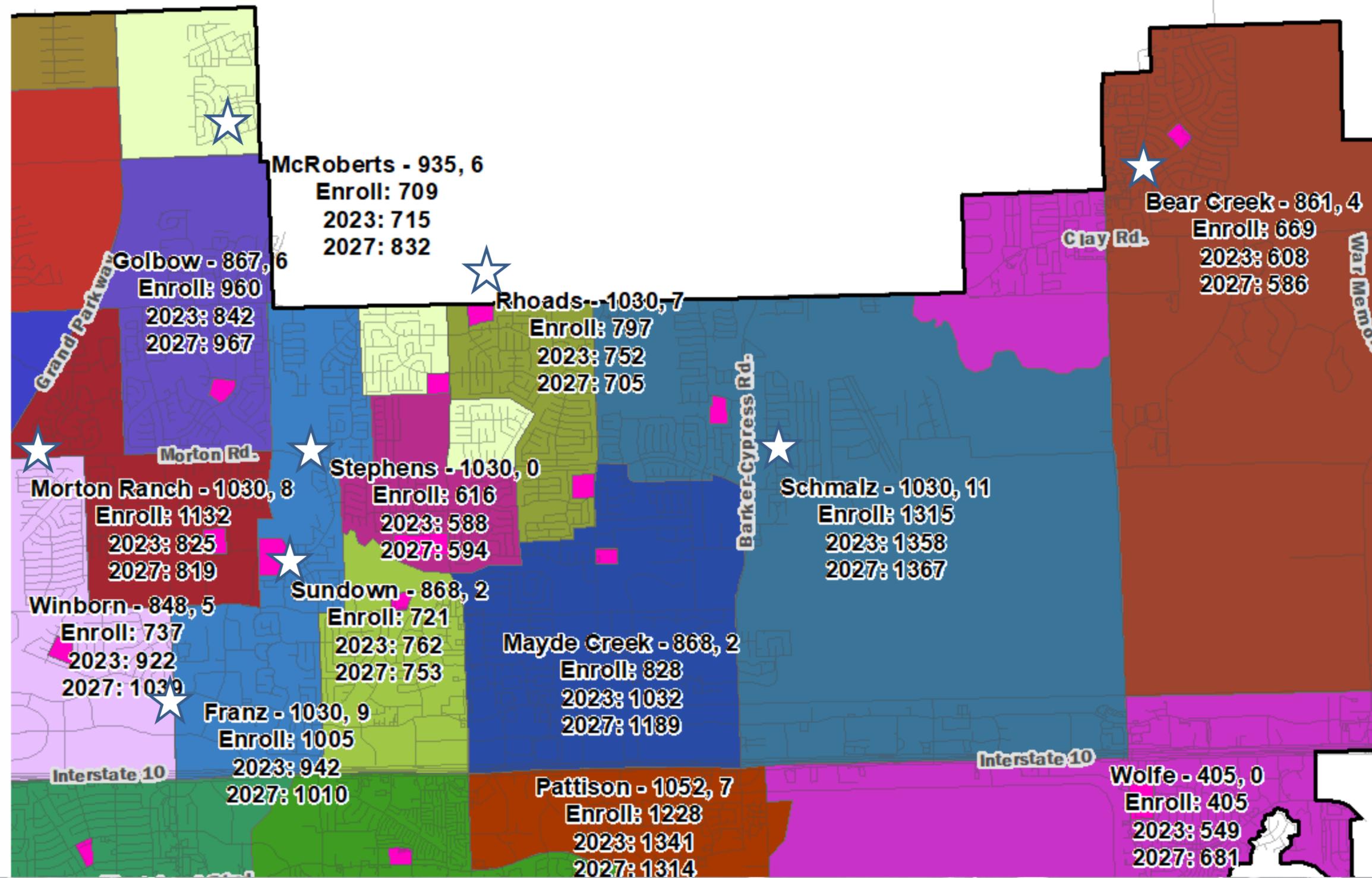
	2023	2024	2025	2026	2027
<b>Enrollment</b>	<b>95,104</b>	<b>96,867</b>	<b>98,493</b>	<b>99,864</b>	<b>101,156</b>
<b>% Growth</b>	2.57%	1.85%	1.68%	1.39%	1.29%
<b>Growth</b>	2,380	1,763	1,626	1,371	1,292
	2028	2029	2030	2031	2032
<b>Enrollment</b>	<b>102,664</b>	<b>103,852</b>	<b>105,013</b>	<b>106,274</b>	<b>107,357</b>
<b>% Growth</b>	1.49%	1.16%	1.12%	1.20%	1.02%
<b>Growth</b>	1,508	1,188	1,161	1,261	1,083

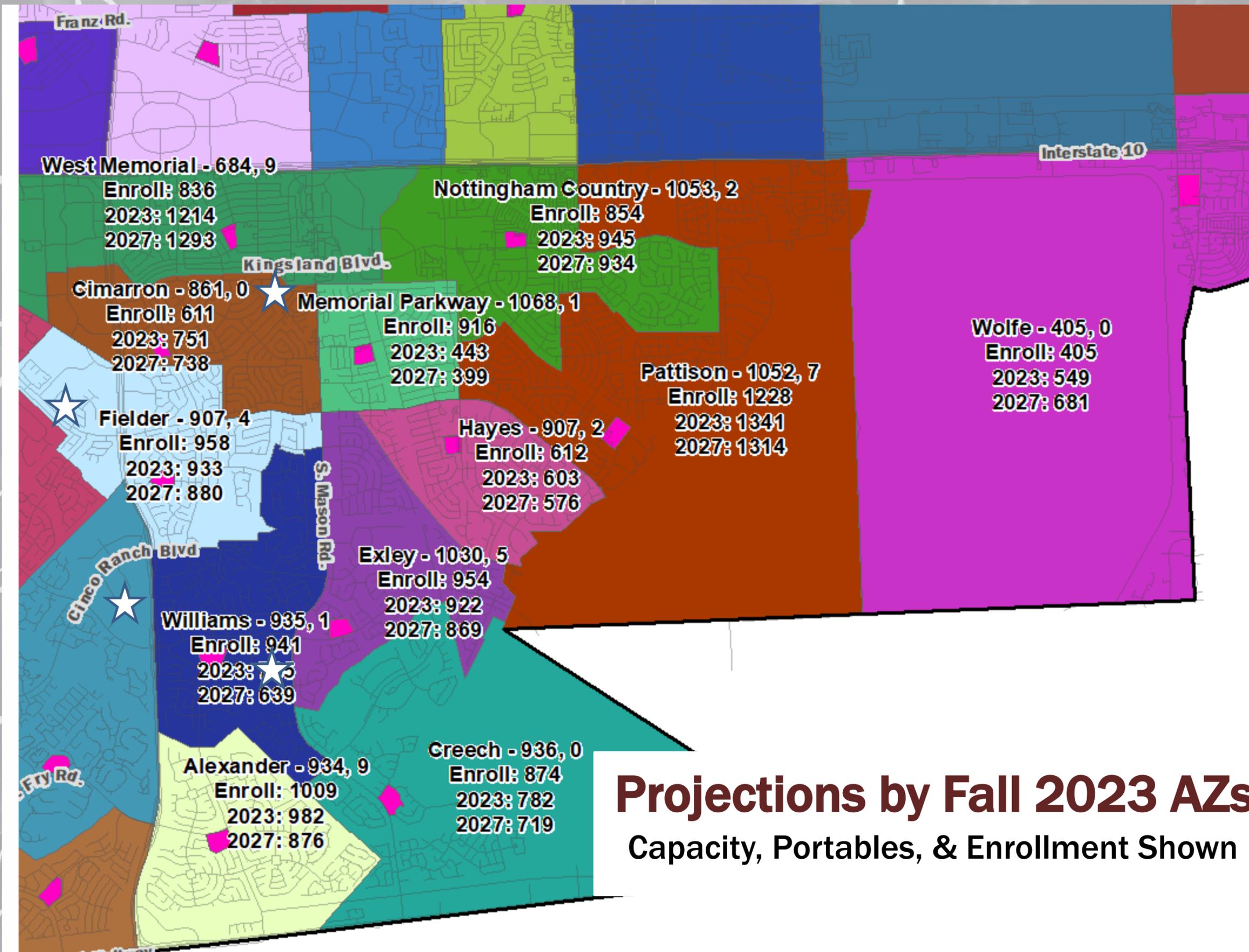
# LONG-RANGE PLANNING



# Projections by Fall 2023 AZs

Capacity, Portables, & Enrollment Shown; No Transfers Included

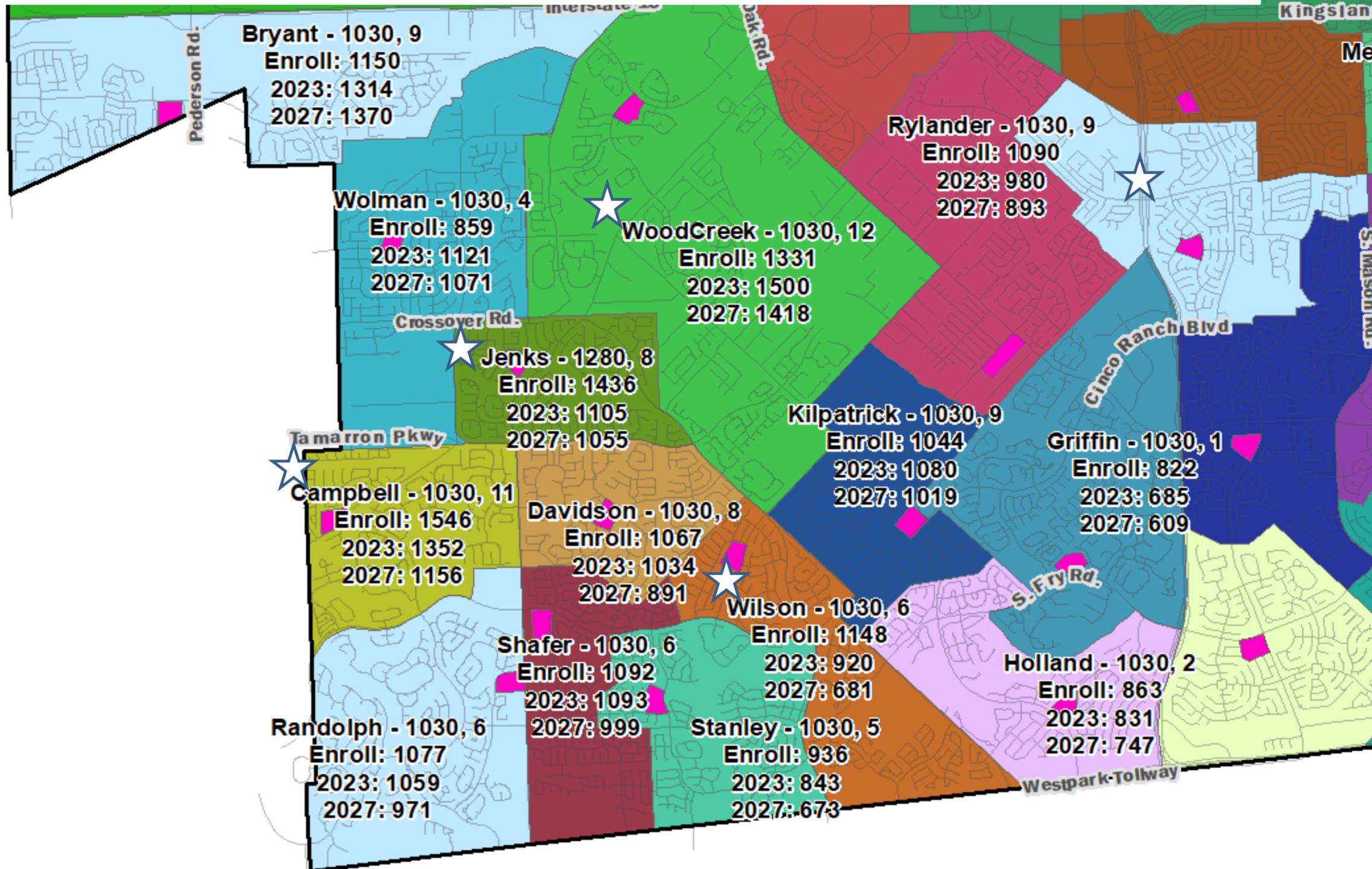




**Projections by Fall 2023 AZs**  
Capacity, Portables, & Enrollment Shown

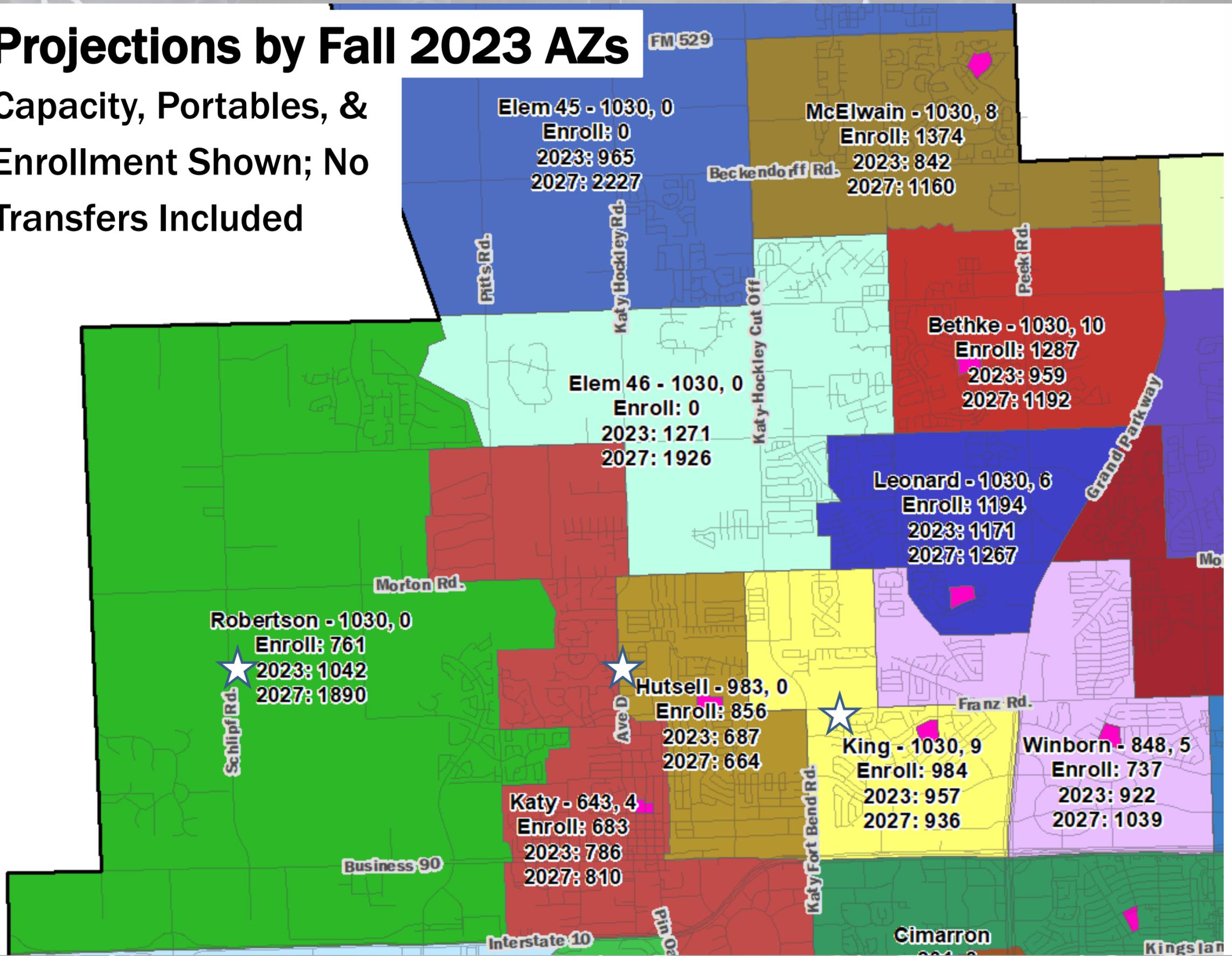
# Projections by Fall 2023 AZs

Capacity, Portables, & Enrollment Shown; No Transfers Included



# Projections by Fall 2023 AZs

Capacity, Portables, &  
Enrollment Shown; No  
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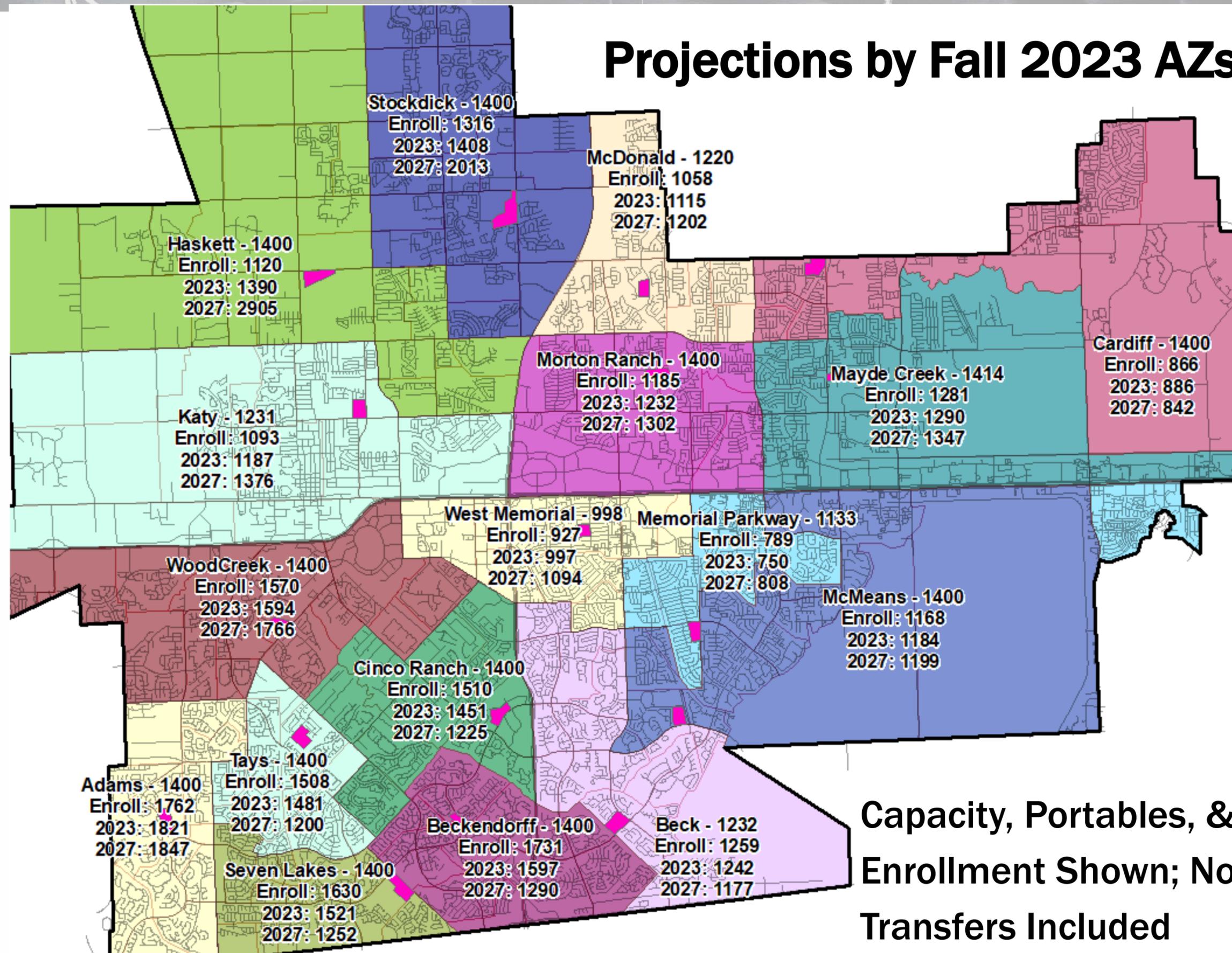




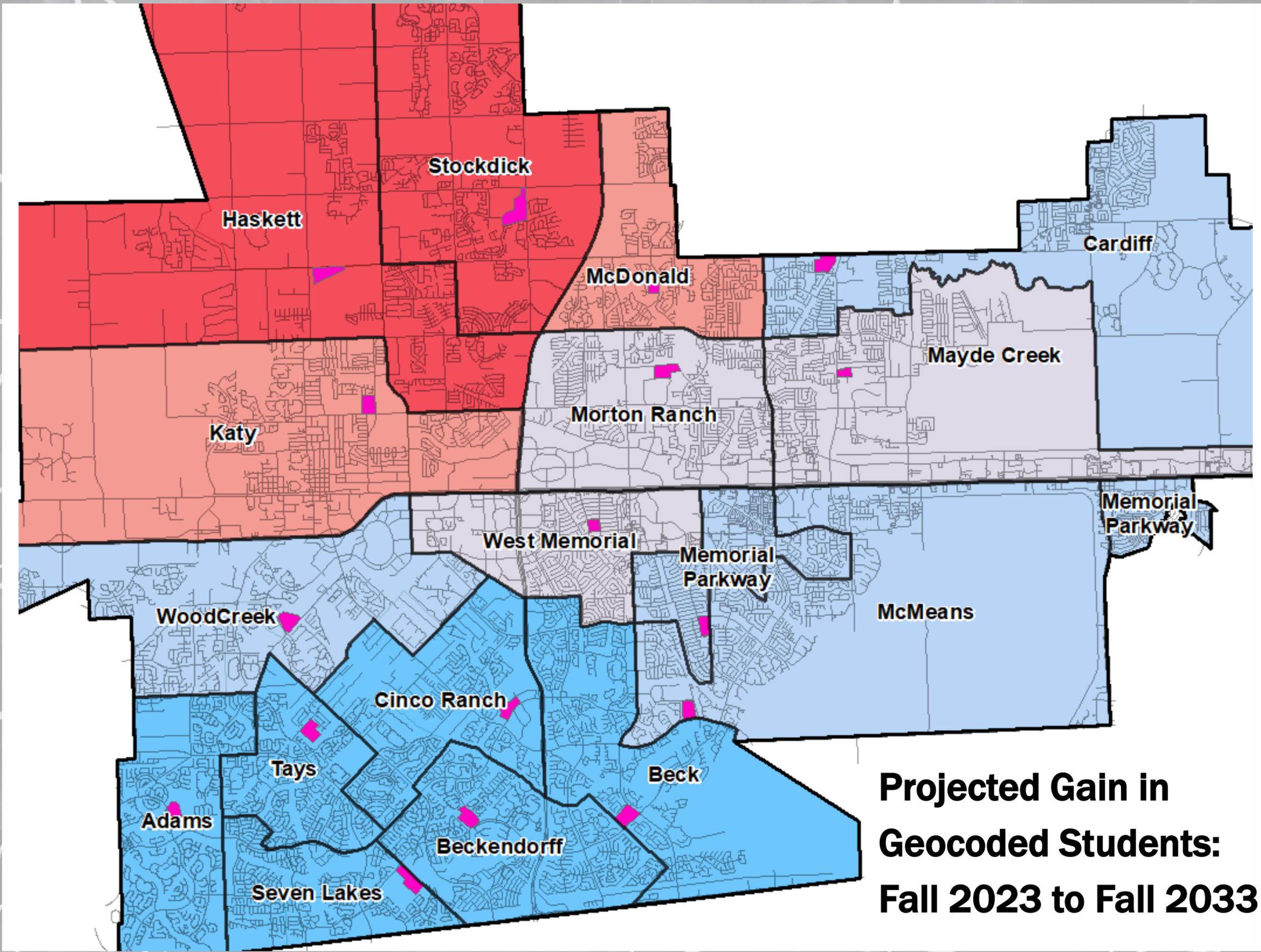
# Elementary School Planning Summary

- ▶ Numerous additional schools later in the NW
- ▶ Possible tweaks to AZs as population shifts over time in existing subdivisions and in-fill continues
- ▶ All new elementary schools will need bond funds

# Projections by Fall 2023 AZs



Capacity, Portables, & Enrollment Shown; No Transfers Included

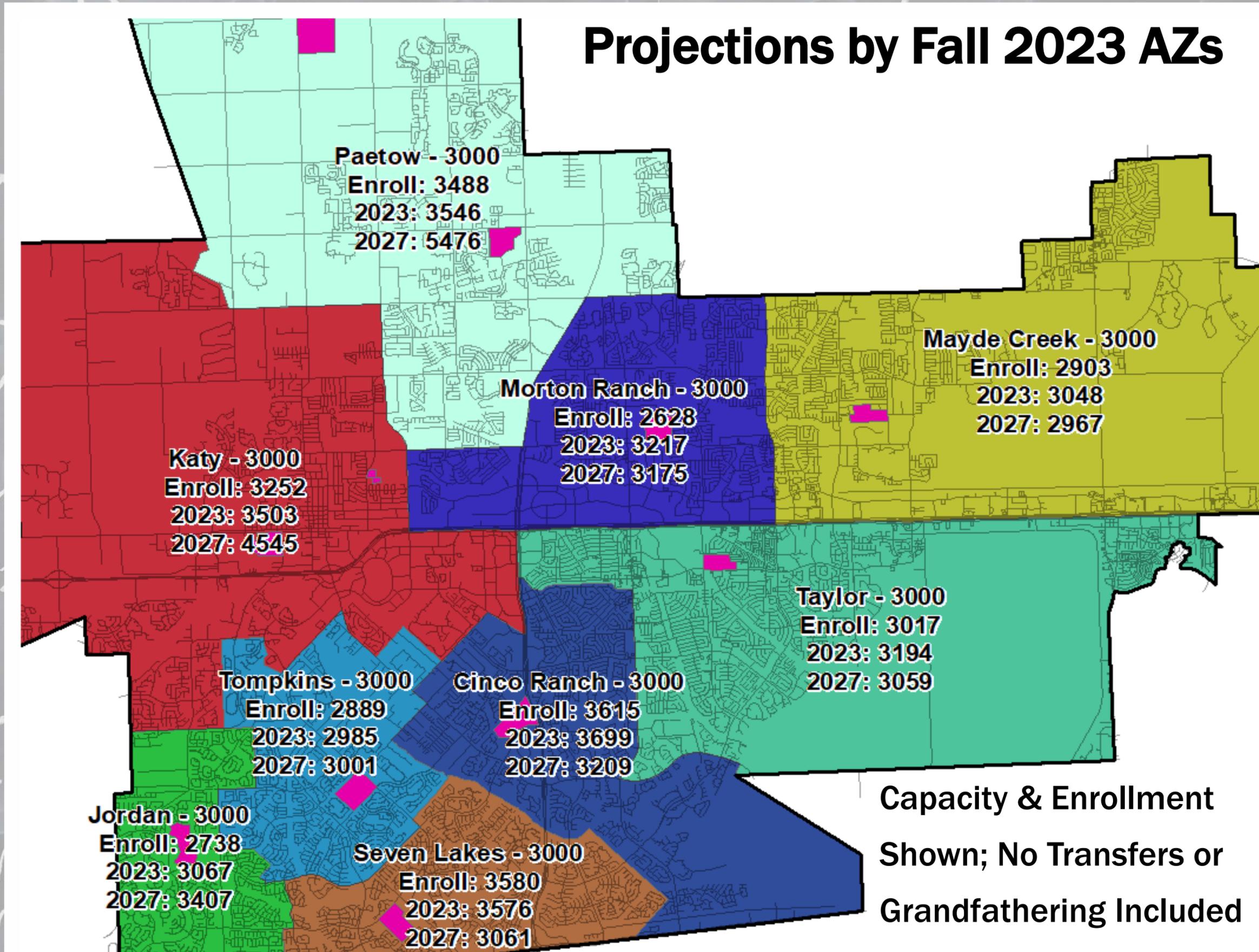


**Projected Gain in Geocoded Students: Fall 2023 to Fall 2033**

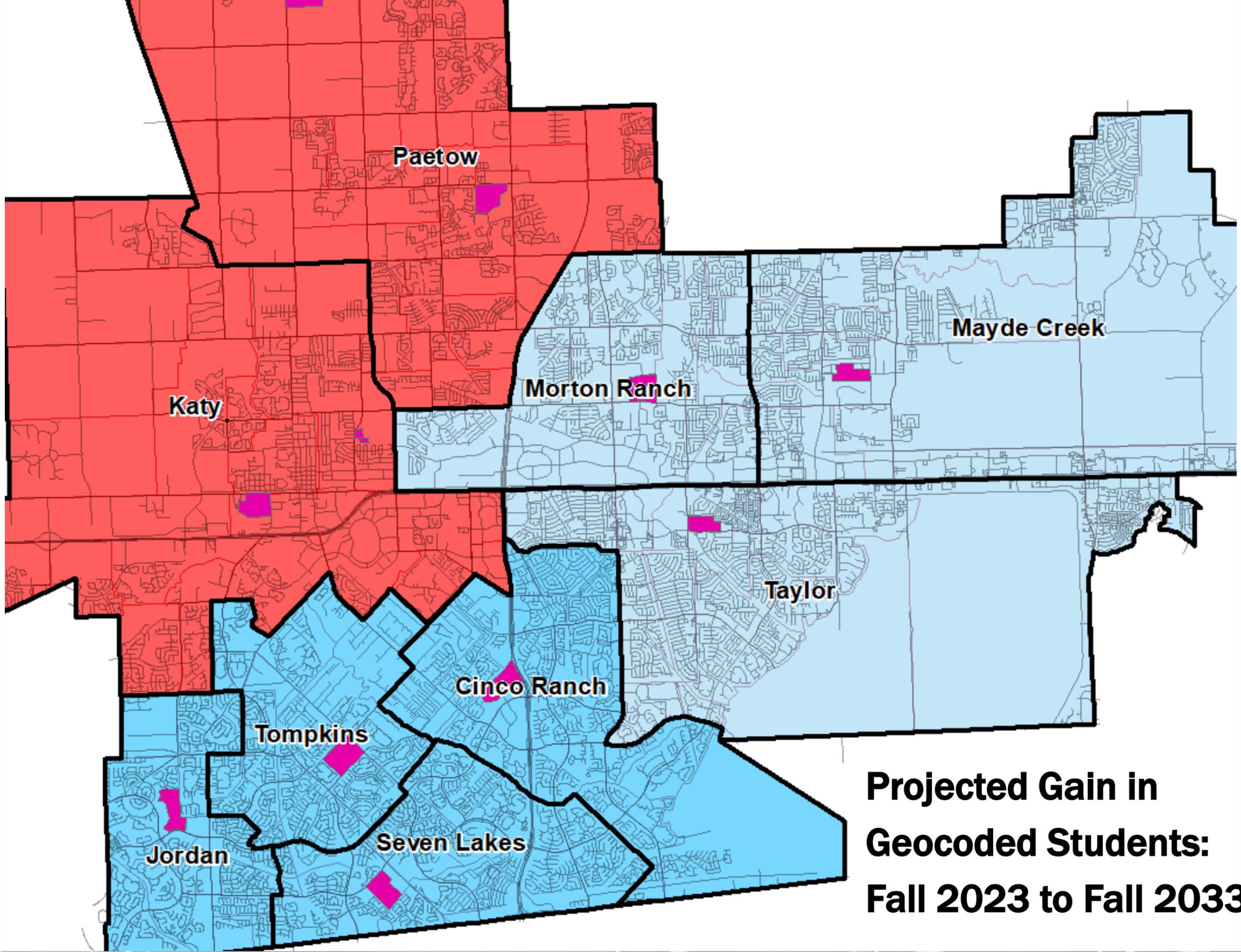
# Junior High School Planning Summary

- ▶ **SW should ultimately age**
  - ▶ In SW JHs, there are currently 3,382 8<sup>th</sup> graders and 2,414 1<sup>st</sup> graders
- ▶ **Several additional junior highs in the northwestern portion of the District**
  - ▶ District owns land and has bond funds available for JH 18; all others require bond funds

# Projections by Fall 2023 AZs



Capacity & Enrollment  
Shown; No Transfers or  
Grandfathering Included



**Projected Gain in Geocoded Students: Fall 2023 to Fall 2033**

# High School Planning Summary

- ▶ High School 10 in 6B to relieve KHS and PHS
- ▶ HS 10 could be full by the middle of the projection period, with growth still expected
- ▶ District not expected to be built-out at the end of the projection period
- ▶ Could get additional high school space from alternative HS programs

QUESTIONS?





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