Gilbert Public Schools Demographic & Enrollment Analysis 2023/24

Final Report

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Executive Summary

The 2023/24 demographic and enrollment update for the Gilbert Unified School District (District) incorporates new data for the District and its sub-areas, as well as information regarding changes in regional socioeconomic conditions. The purpose of this analysis is to identify current and historic demographic, development and enrollment trends, and to anticipate future trends to create District and sub-District enrollment projections through 2033/34.

- Total K-12 enrollment in the District was 32,050 students in the fall of the 2023/24 school year, representing a 3 percent decrease (roughly 970 students) over last year. K-12 enrollment is now 7 percent (2,500 students) below total 2019/20 (pre-pandemic) enrollment. In-District enrollment dropped by nearly six percent (nearly 1,700 students) in the 2020/21 school year due to the anomalous effects of the pandemic. In-District enrollment has declined sharply (10 percent) since 2019/20 and now accounts for 82 percent of total enrollment, down from 85 percent in 2014/15.

- Compared to 2022/23, the total number of out-of-District students enrolled in the District decreased slightly by 71 students this year, following several years of increases. The 5,794 out-of-District students that were enrolled in 2023/24 came from more than 15 metro area school districts. However, 59 percent of the out-of-District students came from the Mesa (2,300 K-12 students) and Higley Unified School Districts (1,200 K-12 students). Out-of-District enrollment is concentrated in the District's high schools and Desert Ridge High School continues to have the largest out-of-District enrollment at 577 students.

- Demographic data indicates a general aging of the District's population. Between 2000 and 2023, the share of the population under 5 years of age fell from 10 percent of the total population to 7 percent. The share of school-age population (5 to 17 years of age) remained relatively unchanged from 2000 to 2010 at 23 percent, but has fallen to 18 percent as of 2023. Persons in the 25 to 44 age group, which is typically most closely correlated with having young children, constituted about 36 percent of the total population in 2000 but dropped to 26 percent in 2023. Meanwhile, the population age 45 to 64 years of age has grown significantly faster than the other age cohorts increasing from 17 percent of the total population in 2000 to 26 percent in 2023.

- There are currently 15 charter schools located within the District serving 7,100 K-12 students, and there are an additional 24 charter schools operating within one mile of District boundaries that serve another 11,600 K-12 students. Although charter school enrollment more than doubled between 2010/11 to 2021/22, two charter schools nearby the District have closed since 2021/22, and total charter enrollment has declined by almost 700 students over the past two years. While charter enrollment is declining, private school enrollment is increasing due to the availability of Empowerment Scholarship Accounts (ESAs). In 2021/22 there were 373 students living in the District that received ESA vouchers, and by 2023/24 that number had risen to 2,463 students. While some of these students were already enrolled at alternative providers, the increase in ESA voucher usage will likely have an impact on future District enrollment.

- The projections include the addition of 10,500 housing units over the next ten years, a 13 percent increase over the current inventory. The vast majority (72 percent) of new units added during the projection period are expected to be multifamily. Although population per household is expected to decline over the next ten years, due to the aging of the population and the influx of multifamily units, 10,500 new households are projected to yield a total District population of more than 237,600 people by 2033/34, which represents an increase of 9 percent compared to 2023/24.
- The difference between the District's resident school-age population and in-District enrollment has been gradually increasing. As a result, the District's "service rate" has declined by 14 percent since 2014/15, dropping to 65.2 percent this year. Assuming a moderate service rate decline and a slight increase in out-of-District enrollment, the District is expected to experience a loss of about 2,700 students by 2033/34 (9 percent), yielding total enrollment of 29,300 K-12 students. Enrollment is expected to decline in each of the next 10 years, dropping by an average of 0.9 percent per year during the projection period. The vast majority of the 10-year decline (81 percent) is expected to due to the loss of roughly 2,200 K-6 students.
- During the first half of the projection period, 23 of the 26 elementary attendance areas are projected to experience some degree of enrollment decline, resulting in a loss of 1,600 in-District K-6 students over the five-year period. The only area with significant enrollment gains projected is the Boulder Creek (+200 students) attendance area. The largest losses are expected in the Greenfield and Canyon Rim attendance areas (-200 students each). During the second half of the projection period, only the Boulder Creek attendance area is projected to have a notable enrollment increase (+100 students). Small enrollment losses or flat enrollment is expected in all of the remaining elementary attendance areas, resulting in a net loss of 400 in-District K-6 students during the second five-year period. Out-of-District enrollment is also projected to decrease during the second half of the projection period, declining by about 100 students.
- In-District 7-8 attendance area enrollment is expected to increase during the first five-year period (+300 students) and decline during the second five-year period (-700 students), resulting in the net loss of 400 In-District students 7-8 over the next ten years. This enrollment decline is slightly offset by a net gain of roughly 40 out-of-District students over ten years. Enrollment declines over the 10-year period are expected in the Greenfield (-160 students), Highland (-140 students) and South Valley (-140 students) by 2033/34. Desert Ridge is the only 7-8 attendance area projected to experience an enrollment increase of any significance over the next 10 years (+60 students).
- Modest enrollment declines are projected at the high school level due to the loss of nearly 900 in-District 9-12 students over the next 10 years. Only the Desert Ridge attendance area is projected to experience an enrollment increase (+200 students) by 2033/34; losses in the remaining attendance areas range from 100 students at Mesquite to losses of 400 to 450 students each at Highland and Gilbert. These losses are partially offset by a 700-student increase in out-of-District enrollment, particularly during the second half of the projection period.

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1.0 Introduction

The 2023/24 Demographic and Enrollment Analysis for the Gilbert Unified School District (District) incorporates information on enrollment, demographic trends, housing occupancy rates, household characteristics and residential development into 10-year District-level and small-area projections of enrollment by grade. The District-level projections use long-term demographic and housing trends for the District and projected trends for the region in a macroeconomic, top-down analysis of enrollment.

In addition to the District-wide enrollment forecasts, projections are developed for small-area planning geographies (grids) that are generally one-quarter of a square mile, as shown on **Map 1**. The District is divided into 224 grids that can be combined to represent current school attendance areas and provide sufficient detail to support future facility and attendance area planning activities. Small-area enrollment projections are developed by combining the location by grid of current students in the District with the expected number of housing additions, and the students generated from that new housing.

The balance of this report is separated into four sections: Existing Conditions, Residential Development, District Projections, and Sub-District Projections. Section 2, Existing Conditions, provides a historical context for interpreting the current District enrollment levels and a detailed review of student distribution by grade and geography.

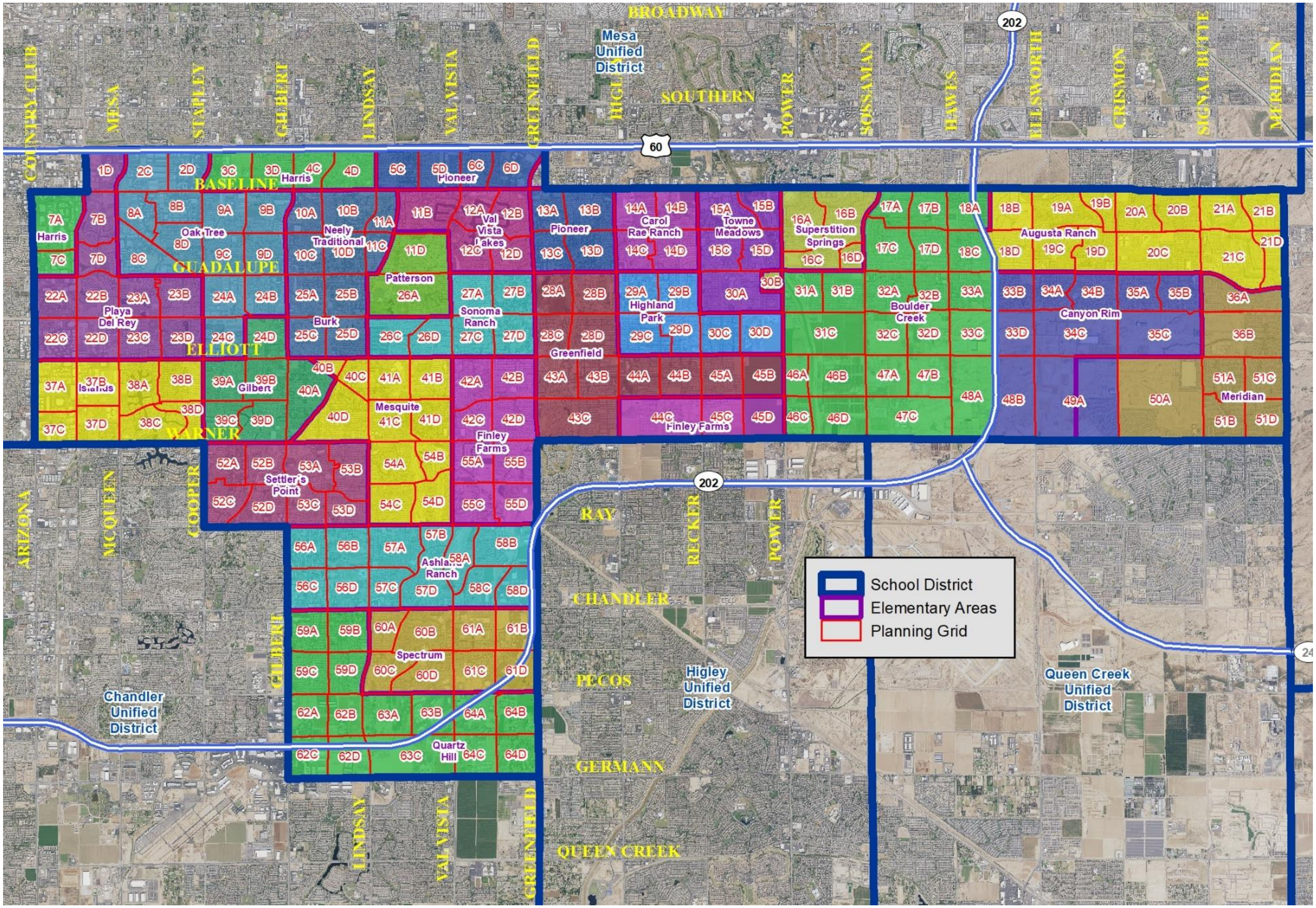
Section 3, Residential Development, presents information on current construction activity, vacancy rates and the potential future supply of new housing by unit type. It provides estimates for the timing of construction based on current activity, ownership and zoning status for vacant land available for residential development and area growth forecasts.

District Projections are provided in Section 4. These enrollment projections are created by combining the expected residential housing additions with the existing District population, accounting for regional and local trends in socioeconomic conditions and forecasts.

Section 5, Sub-District Projections, describes the anticipated change in enrollment within the District based on many factors, including additions to housing inventory, occupancy rates and population per household trends. These projections are created by combining the grid location of current students in the District with the expected number of housing additions, the school-age persons generated from them, and the likely share of those persons that will attend a District school. The small-area projections are aggregated by current attendance area in order to provide baseline projections, but they can also be summed to examine alternative attendance areas. These projections are then adjusted to predict enrollment by school based on the current relationship between where students live and where they attend school.

The information and observations contained in this report are based on our present knowledge of the land use and development patterns of the area under analysis, the current physical and socioeconomic conditions of the affected areas, and regional forecasts. Estimates and projections made in this report are based on hypothetical assumptions. However, even if the assumptions outlined in this report occur, there will usually be differences between the estimates and projections and the actual results because events and circumstances frequently do not occur precisely as expected. Applied Economics is under no obligation to update this report for events occurring after the date of its release.

MAP 1
DISTRICT GRID PLANNING GEOGRAPHY



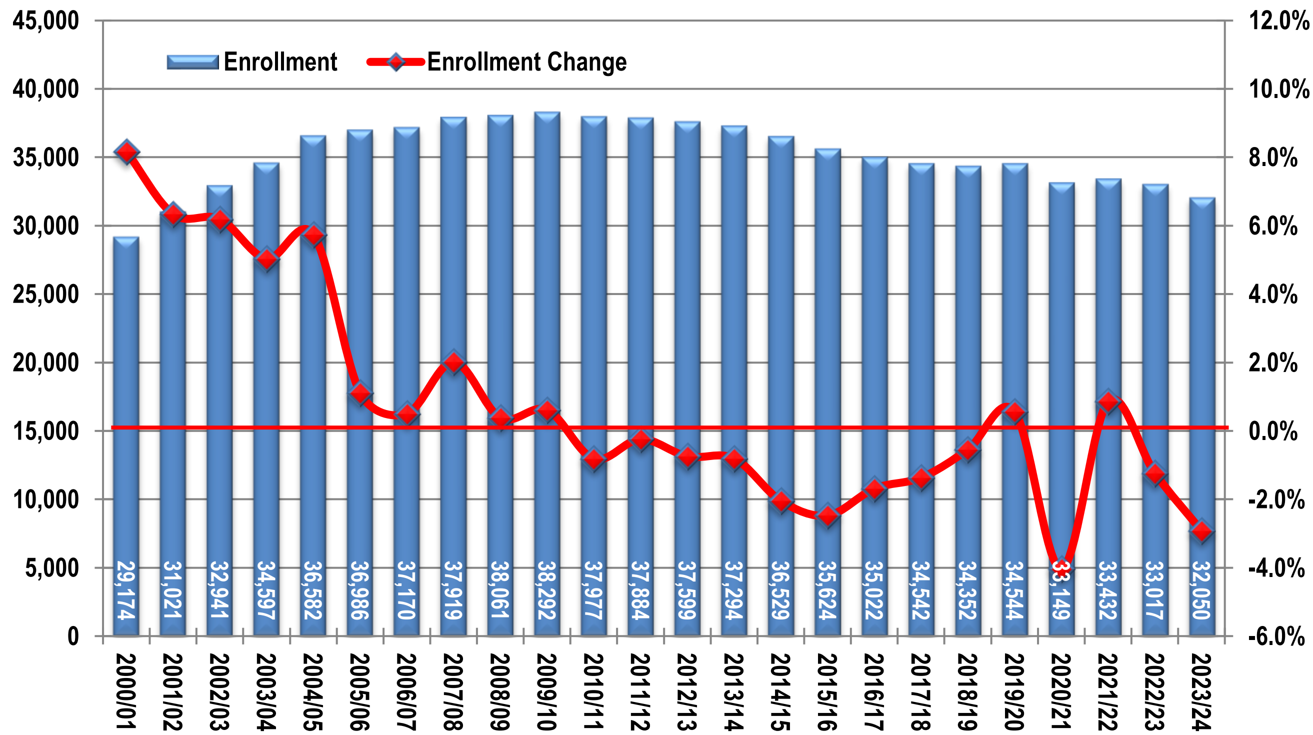
2.0 Existing Conditions

2.1 Enrollment

Total Kindergarten through 12th grade (K-12) enrollment in the District was 32,050 students in the fall of the 2023/24 school year, representing a 3 percent decrease (roughly 970 students) over last year and continuing the downward trend over the past several years. K-12 enrollment is now 7 percent (2,500 students) below total 2019/20 (pre-pandemic) enrollment.

As illustrated by **Figure 1**, the District experienced substantial growth in the early 2000's, with an average increase of around 1,900 students per year between 2000/01 and 2004/05. Over the following five years growth slowed considerably, but enrollment continued to increase by a few hundred students per year. From 2010/11 through 2018/19, K-12 enrollment declined by an average of 400 students every year. Despite the fact that roughly 8,000 new housing units were added, the total enrollment loss for the nine-year period was nearly 4,000 students. While this decline was due in part to the aging of the District's population, it was also fueled by a strong increase in charter school enrollment in and around the District. There was a sharp decline in 2020/21 due to the pandemic that was fairly universal across all districts in the region, followed by the return of a small number of students in 2021/22. However, the past two years the decline in District enrollment has continued.

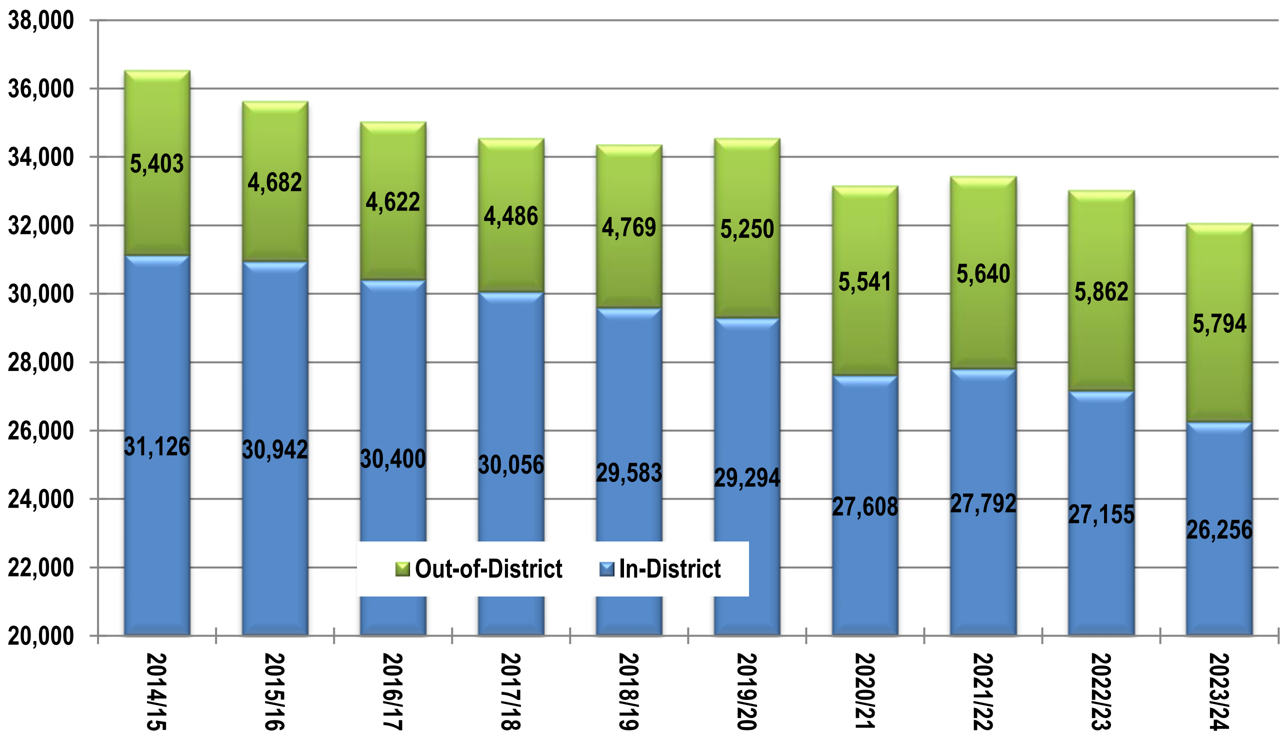
FIGURE 1
HISTORIC ENROLLMENT



Source: Arizona Department of Education; Gilbert Unified School District.

As illustrated in **Figure 2**, in-District enrollment dropped by nearly six percent (nearly 1,700 students) in the 2020/21 school year due to the anomalous effects of the pandemic. In-District enrollment has declined sharply (10 percent) since 2019/20 to roughly 26,300 students, and now accounts for 82 percent of total enrollment, down from 85 percent in 2014/15. Out-of-District enrollment has increased slowly since 2017/18, and now accounts for nearly 18 percent of total enrollment, up from 15 percent in 2014/15. There was a slight decline in out-of-District enrollment in 2023/24 but this could be a one-year anomaly.

FIGURE 2
SOURCE OF DISTRICT ENROLLMENT



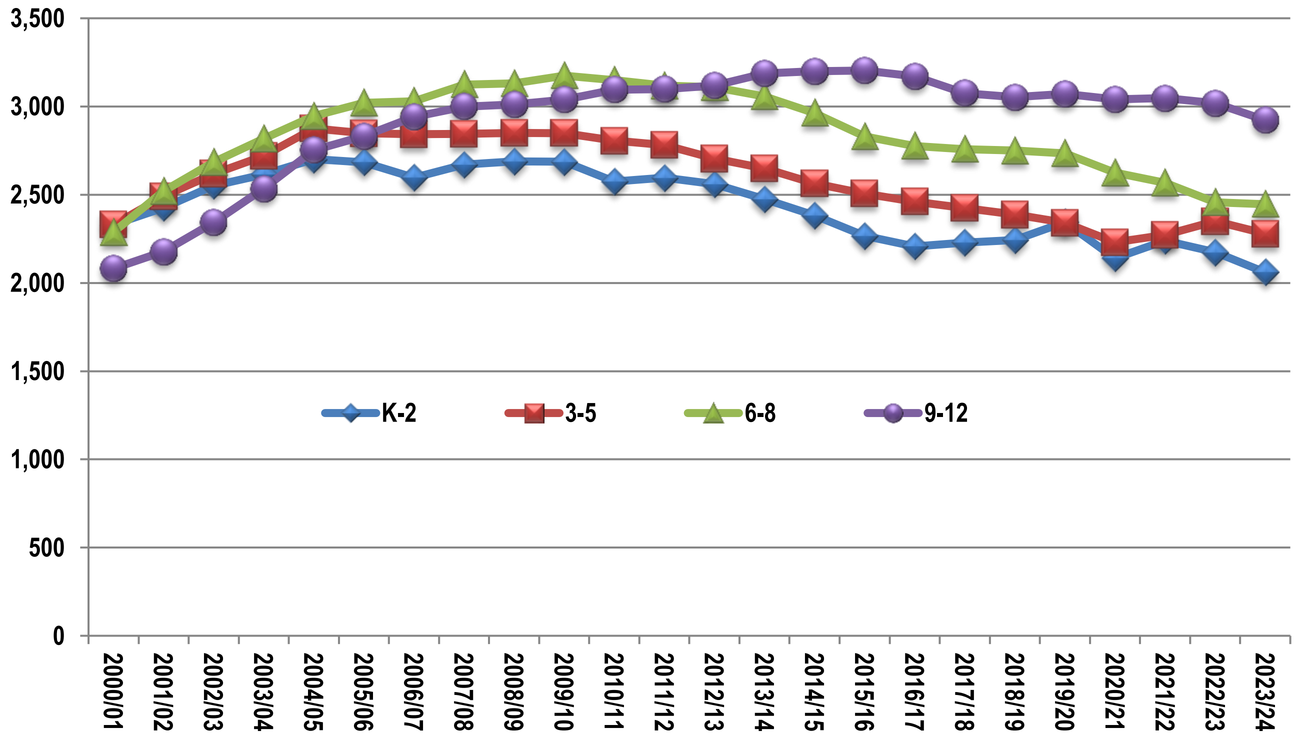
Sources: Gilbert Unified School District; Applied Economics.

The breakdown of enrollment by grade cohort provides a good understanding of past and current enrollment characteristics, and lends insight into structural trends that will continue to shape enrollment in the coming years. For this purpose, the grades are grouped into the following cohorts: Kindergarten through 2nd grade (K-2), 3rd through 5th grade (3-5), 6th through 8th grade (6-8) and 9th through 12th grade (9-12). By showing the average enrollment per grade (**Figure 3**), the differences between the three- and four-grade groupings are normalized.

Enrollment in the three K-8 cohorts was relatively equal in2000/01, while the 9-12 cohort which contained 200 to 300 fewer students per grade than the other three cohorts. Beginning in 2003/04, growth in the K-2 and 3-5 cohorts began to level off, while the size of the 6-8 and 9-12 cohorts continued to increase as larger classes moved forward, and as the community attracted more families with junior high and high school age students.

As the influx of young families slowed and the resident population continued to age, District enrollment growth slowed and each grade cohort reacted to the changes in the preceding cohort. By 2010/11, per grade enrollment in all of the primary (K-8) cohorts was in decline. In 2016/17 the trend reached the 9-12 cohort, causing average enrollment in the cohort to decline for several years. In 2019/20, per grade 9-12 enrollment increased slightly for the first time since 2015/16, but it has since declined by 1.7 percent to about 2,900 students per grade, its lowest point since 2007/08. K-2 enrollment continued to decline, dropping from an average of 2,240 students per grade in 2021/22 to 2,060 students per grade in 2023/24. Although average 3-5 enrollment increased slightly last year, it dropped in 2023/24 back to roughly the same level as in 2021/22, while the 6-8 cohort remained relatively stable over the past year. Current grade-level enrollment in both all three K-8 cohorts is well-below 2019/20 levels. The largest decline over the past five years has been in the K-2 cohort, where average enrollment has declined by 12 percent since 2019/20, followed by an 11 percent decline in 6-8 and only a 3 percent decline in 3-5.

FIGURE 3
AVERAGE ENROLLMENT BY GRADE BY COHORT



Source: Arizona Department of Education; Gilbert Unified School District; Applied Economics.

In addition to the distribution of enrollment by grade cohort, the geographic distribution of enrollment provides valuable insight into other conditions and trends impacting the District. **Map 2** shows the current location of students attending District schools, including those living in the immediately surrounding area. This map illustrates the impact of open enrollment policies, as the District continues to attract numerous students from a large number of areas outside its boundaries.

MAP 2
GEOGRAPHIC DISTRIBUTION OF STUDENTS: 2023/24

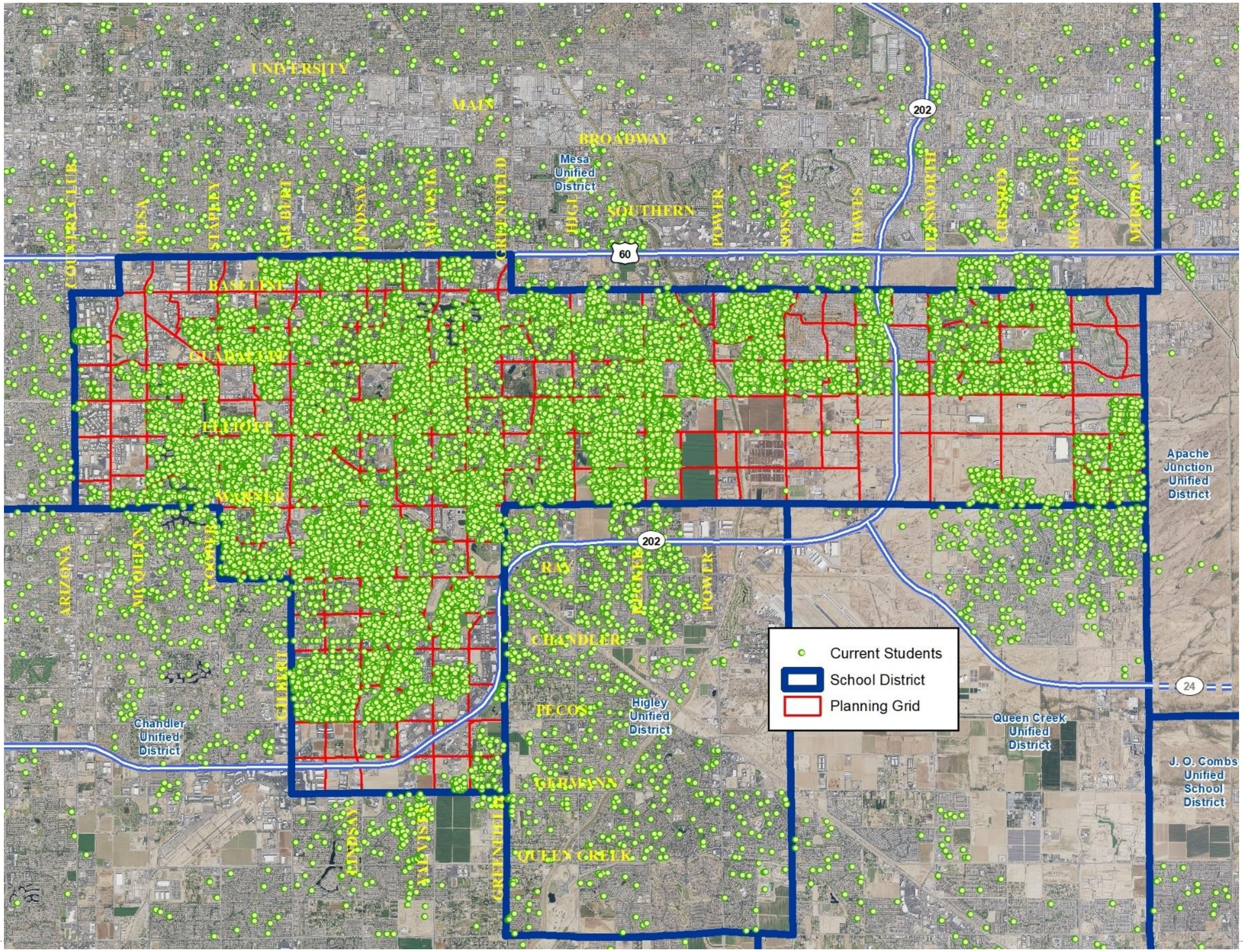


Table 1 shows the source of out-of-District enrollment by grade for the current school year. In all, the 5,794 out-of-District students that were enrolled in 2023/24 came from more than 15 metro area school districts. The largest number of out-of-District students came from the Mesa (2,300 K-12 students) and Higley Unified School Districts (1,200 K-12 students), which together account for 59 percent of out-of-District students. There were slight declines in the number of students from both of these districts over the past year.

Compared to 2022/23, the total number of out-of-District students enrolled in the District in 2023/24 decreased for the first time in five years by 71 students. Typically, Kindergarten, 7th grade, and 9th grade experience the largest change of out-of-District enrollment, since these are the grades when students are most likely to transition. However, this year, the largest out-of-District enrollment decrease was in 10th grade (-57 students), Kindergarten (-49 students) and 3rd grade (-36 students).

TABLE 1
SOURCE OF OUT-OF-DISTRICT ENROLLMENT BY GRADE: 2023/24

	Enrollment by Grade														2022/23	
District	KG	1	2	3	4	5	6	7	8	9	10	11	12	Total	Total	Change
Mesa Unified District	148	169	172	163	170	178	131	181	167	192	197	193	216	2,277	2,341	-64
Higley Unified District	63	73	82	84	70	68	64	73	85	108	107	132	119	1,128	1,188	-60
Chandler Unified District	47	57	47	54	71	56	60	57	57	97	104	107	126	940	932	8
Queen Creek Unified District	41	40	51	31	40	44	43	32	36	51	45	66	77	597	579	18
Apache Junction Unified District	17	25	35	17	26	24	26	33	35	52	36	43	41	410	375	35
Florence Unified School District	8	9	10	13	7	8	10	3	7	8	8	9	17	117	114	3
J. O. Combs Unified School Distric	8	8	5	8	9	6	8	8	9	13	10	16	14	122	118	4
Kyrene Elementary District	2	5	1	4	1	1	3	2	1	0	7	5	5	37	48	-11
Tempe School District	4	2	2	4	4	1	2	5	2	3	4	3	2	38	44	-6
Phoenix Elementary District	3	0	0	0	0	0	0	1	0	0	2	0	2	8	7	1
Roosevelt Elementary District	0	1	1	2	2	1	2	2	2	0	0	0	1	14	9	5
Maricopa Unified School District	4	0	0	1	0	2	1	1	2	3	1	0	4	19	17	2
Paradise Valley Unified District	1	0	0	0	0	0	0	0	1	0	1	1	0	4	4	0
Scottsdale Unified District	0	2	1	0	2	0	1	0	1	2	0	0	3	12	11	1
Washington Elementary District	0	0	1	0	1	0	0	0	0	0	0	0	0	2	2	0
Other	2	7	3	5	4	4	5	3	6	7	10	3	10	69	76	-7
Total	348	398	411	386	407	393	356	401	411	536	532	578	637	5,794	5,865	-71

Sources: Gilbert Public Schools, 2023; Applied Economics, 2024.

Since 2018/19, the number of out-of-District students coming from the Mesa Unified School District has increased by 28 percent (more than 500 K-12 students). There have also been substantial gains in the number of students enrolling from Chandler Unified (+34 percent or about 240 students) and Apache Junction Unified (+82 percent or 185 students) (**Table 2**). There is potential for a significant amount of new construction in the Apache Junction District in an area that borders Gilbert Public Schools, which may lead to additional increases in out-of-District enrollment from that district.

TABLE 2
CHANGE IN OF OUT-OF-DISTRICT ENROLLMENT BY SOURCE

District	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	Change 2018/19 - 2023/24
Mesa Unified District	1,772	2,021	2,164	2,310	2,341	2,277	505
Higley Unified District	1,125	1,142	1,167	1,142	1,188	1,128	3
Chandler Unified District	702	830	870	888	932	940	238
Queen Creek Unified District	586	574	598	566	579	597	11
Apache Junction Unified District	225	291	296	338	375	410	185
Florence Unified School District	129	127	114	99	114	117	-12
J. O. Combs Unified School District	89	104	125	109	118	122	33
Kyrene Elementary District	31	55	39	31	48	37	6
Tempe School District	28	27	25	53	44	38	10
Phoenix Elementary District	10	13	7	13	7	8	-2
Roosevelt Elementary District	12	9	7	6	9	14	2
Maricopa Unified School District	7	8	5	7	17	19	12
Paradise Valley Unified District	1	6	2	4	4	4	3
Scottsdale Unified District	13	6	14	13	11	12	-1
Washington Elementary District	3	6	2	5	2	2	-1
Other	36	31	106	56	76	69	33
Total	4,769	5,250	5,541	5,640	5,865	5,794	1,025

Sources: Gilbert Public Schools, 2023; Applied Economics, 2024.
* Current grade compared to prior grade last year except for Kindergarten and 9th grade which are the same grade.

Table 3 shows where out-of-District students were enrolled in 2022/23 by school and grade level, and clearly illustrates the fact that out-of-District enrollment is concentrated in the District's high schools. Desert Ridge High School continues to have the largest out-of-District enrollment (577 students), followed by Campo Verde High School with 460 students. Both Neely Traditional and Gilbert Classical Academies continue to attract a large number of out-of-District K-12 students (roughly 150 students each). Compared to 2022/23, Meridian Elementary had the largest increase in out-of-District students (31 students) and the Gilbert Global Academy had the largest decrease (-47 students).

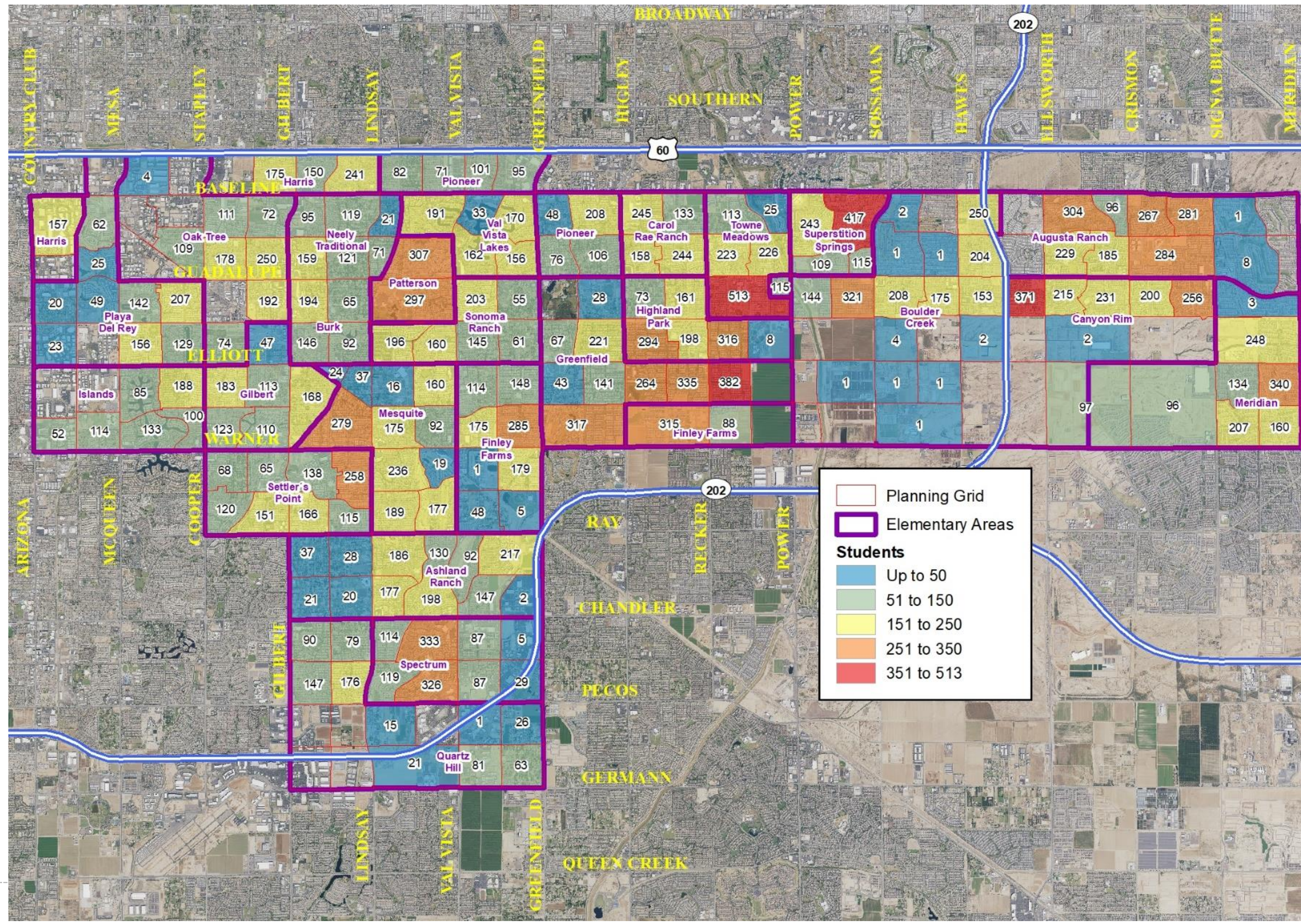
TABLE 3
DESTINATION OF OUT-OF-DISTRICT ENROLLMENT BY GRADE: 2023/24

	KG	1	2	3	4	5	6	7	8	9	10	11	12	Total	2022/23 Total	Change
Ashland Ranch Elementary	14	23	10	17	18	15	14							111	111	0
Augusta Ranch Elementary	13	26	30	26	27	25	30							177	181	-4
Boulder Creek Elementary	1	7	13	5	9	4	6							45	49	-4
Burk Elementary	5	9	4	15	10	7	9							59	82	-23
Campo Verde High School										113	115	124	108	460	435	25
Canyon Rim Elementary	20	25	28	19	13	31	21							157	129	28
Carol Rae Ranch Elementary	20	5	12	12	8	16	10							83	80	3
Desert Ridge High School										150	134	133	160	577	577	0
Desert Ridge Junior High School								110	113					223	214	9
Finley Farms Elementary	5	12	11	3	9	8	12							60	58	2
Gilbert Elementary	17	27	28	21	17	21	21							152	161	-9
Gilbert High School								7	2	71	81	75	78	314	344	-30
Greenfield Elementary	11	11	8	7	14	9	7							67	79	-12
Greenfield Junior High School								63	72					135	129	6
Harris Elementary	15	13	8	15	22	16	13							102	106	-4
Highland High School										108	93	119	94	414	420	-6
Highland Junior High School								59	68					127	136	-9
Highland Park Elementary	19	25	22	21	11	10	12							120	125	-5
Houston Elementary	0	0	0	0	0	0	0							0	0	0
Islands Elementary	21	18	19	16	25	17	21							137	164	-27
Meridian Elementary	30	25	26	22	33	23	21							180	149	31
Mesquite Elementary	10	6	8	11	11	11	6							63	65	-2
Mesquite High School										70	70	75	92	307	298	9
Mesquite Junior High School								50	50					100	110	-10
Oak Tree Elementary	10	8	12	11	13	9	6							69	60	9
Patterson Elementary	9	10	11	12	8	15	11							76	74	2
Pioneer Elementary	17	12	14	18	8	26	11							106	91	15
Playa del Rey Elementary	7	12	14	8	13	8	4							66	74	-8
Quartz Hill Elementary	21	26	34	30	38	21	35							205	213	-8
Settler's Point Elementary	6	9	11	3	8	6	8							51	46	5
Sonoma Ranch Elementary	7	2	10	13	11	9	8							60	62	-2
South Valley Junior High School								84	85					169	153	16
Spectrum Elementary	10	6	7	12	7	13	7							62	62	0
Superstition Springs Elementary	13	26	21	14	18	23	13							128	135	-7
Towne Meadows Elementary	19	18	25	17	24	18	21							142	122	20
Val Vista Lakes Elementary	6	12	8	6	10	14	11							67	70	-3
Neely Traditional Academy	22	25	17	32	22	18	17							153	156	-3
Gilbert Classical Academy								27	15	16	28	26	36	148	162	-14
Gilbert Global Academy									4	3	4	14	33	58	105	-47
Canyon Valley High School									1	1	4	12	35	53	66	-13
Other	0	0	0	0	0	0	1	1	1	4	3	0	1	11	12	-1
Total	348	398	411	386	407	393	356	401	411	536	532	578	637	5,794	5,865	-71

Sources: Gilbert Public Schools, 2023; Applied Economics, 2024.

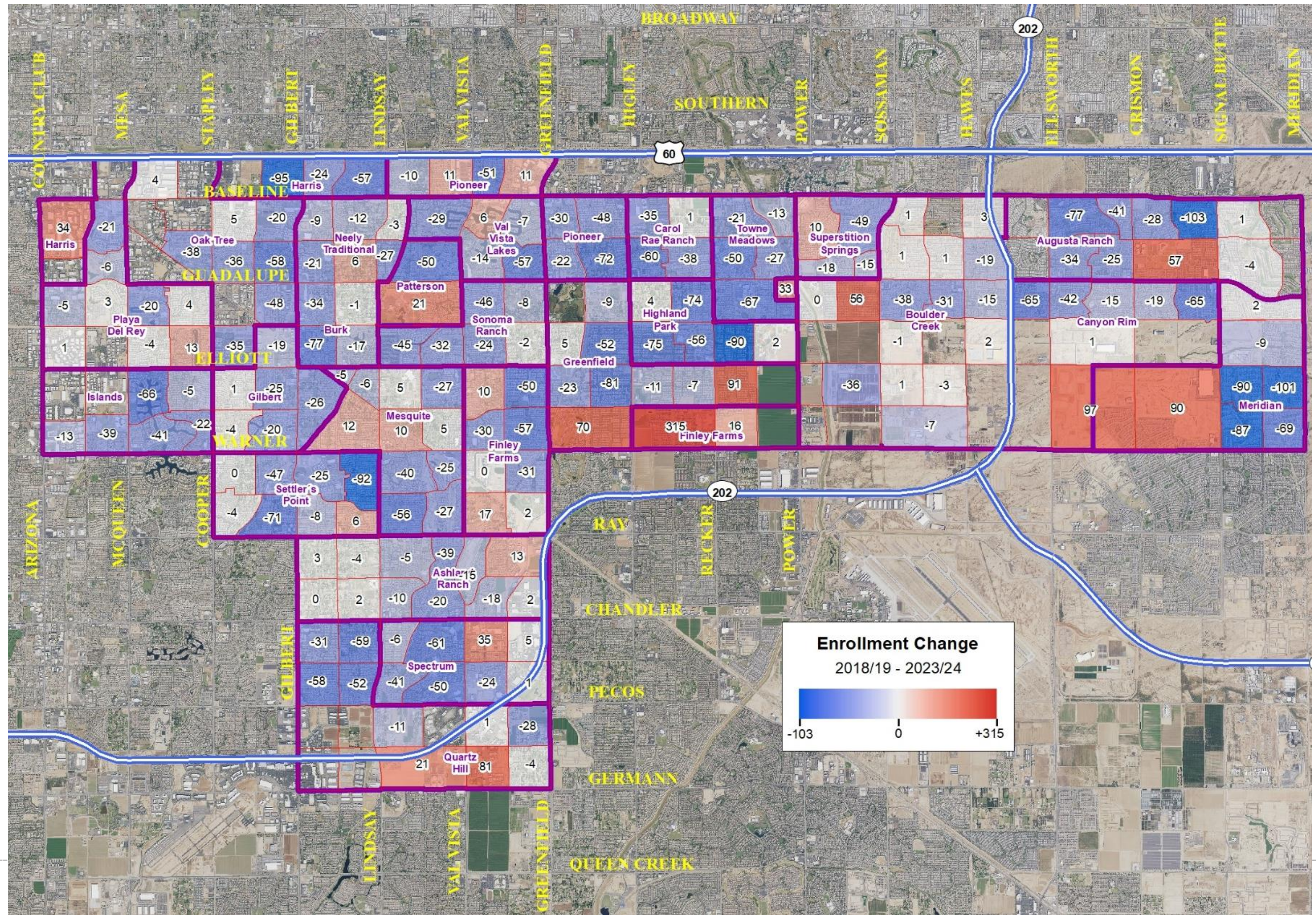
Map 3 normalizes the distribution of the student point data for in-District students, showing the number of K-12 District students coming from each grid. This map shows that enrollment is widely dispersed, with higher student concentrations generally in the central and eastern portions of the District, and in the south where there has been new housing development activity.

MAP 3
ENROLLMENT DENSITY: 2023/24



Both the point location and grid-level data are useful in examining changes in enrollment over time. **Map 4** shows the change in enrollment by planning grid since 2018/19, during which time in-District K-12 enrollment losses totaled roughly 3,300 students. While areas of decline are widespread, pockets of enrollment growth, driven by new home construction, are concentrated in the central and eastern portions of the District, although there has also been substantial growth in a few areas south of Ray Road.

MAP 4
CHANGE IN ENROLLMENT: 2018/19 - 2023/24



2.2 Demographic Trends

Table 4 contains Census data on population and housing in the District for 2000, 2010 and 2020, and 2023 estimates prepared by Applied Economics. This information can help to explain recent trends and the current character of the area. The compound annual rate of change is provided to allow for comparison between the two periods.

Between 2000 and 2010, the total population in the District increased by nearly 37 percent, from about 135,000 to 184,000 persons. Total population in 2020 was about 211,400, nearly 15 percent higher than the 2010 Census, equating to an annual growth rate of 1.4 percent, down from 3.2 percent per year between 2000 and 2010. Since 2020, population growth has slowed further, dropping to an average of 1.1 percent per year, although growth in the number of housing units has increased over the past three years by an average of 1.8 percent per year. These trends have resulted in a decline in the District's population per household from 3.03 in 2000 to 2.82 in 2023.

TABLE 4
DEMOGRAPHIC TRENDS

	2000 Census	2010 Census	2020 Census	2023 Estimate	2000-2010 Total	2000-2010 Change*	2010-2020 Total	2010-2020 Change*	2020-2023 Total	2020-2023 Change*
Population	135,012	184,433	211,394	218,391	49,421	3.2%	26,961	1.4%	6,997	1.1%
Housing Units	47,996	69,306	79,324	83,647	21,310	3.7%	10,018	1.4%	4,323	1.8%
Households	44,552	63,380	73,918	77,373	18,828	3.6%	10,538	1.5%	3,455	1.5%
Population Per	3.03	2.91	2.86	2.82	-0.12	-0.4%	-0.05	-0.2%	-0.04	-0.4%

Sources: U.S. Bureau of the Census, 2000, 2010, 2020 and 2022; ACS, 2023; Applied Economics, 2024.
* Annual compound rate of change.

Roughly 66 percent of the District population in 2023 is made up of White persons, down from nearly 82 percent in 2000, as shown in **Table 5**. During the same time period, the share of Hispanic persons in the District increased from 12 percent in 2000 to 18 percent in 2023.The population of other racial groups remains comparatively small.

TABLE 5
DEMOGRAPHIC TRENDS – RACE & ETHNICITY

	2000 Census	2010 Census	2020 Census	2023 Estimate	2000-2010 Total	2000-2010 Change*	2010-2020 Total	2010-2020 Change*	2020-2023 Total	2020-2023 Change*
Population	135,012	184,433	211,394	218,391	49,421	3.2%	26,961	1.4%	6,997	1.1%
By Race & Ethnicity:										
White	81.9%	75.5%	67.6%	66.1%	28,793	2.3%	3,627	0.3%	1,383	0.3%
African American	2.3%	3.1%	3.1%	3.1%	2,570	6.2%	905	1.5%	242	1.2%
Native American	0.5%	0.8%	0.9%	0.9%	653	6.5%	444	2.8%	142	2.5%
Asian	3.3%	4.9%	5.4%	5.5%	4,561	7.4%	2,370	2.4%	725	2.1%
Hispanic	11.9%	15.7%	18.0%	18.7%	12,771	6.0%	9,063	2.8%	2,894	2.5%
Other	0.1%	0.1%	5.1%	5.7%	73	4.4%	10,552	48.4%	1,612	4.8%

Sources: U.S. Bureau of the Census, 2000, 2010, 2020 and 2022; ACS, 2023; Applied Economics, 2024.
* Annual compound rate of change.

The data also illustrates the general aging of the District's population, which began in the first 10-year period and has continued since 2010 (**Table 6**). Between 2000 and 2020, as the large number of young families that arrived in the District during the 1990s aged in place, the share of the population under 5 years of age fell from 10.0 percent of the total population in 2000 to 6.7 percent in 2020. In 2023, this age group accounted for 6.5 percent of the total population. Along with the aging of the existing population, these declines are indicative of the sharp drop in birth rates that have generally persisted since the mid 2010's. At about 23 percent, the share of the school-age population (5 to 17 years of age) remained relatively unchanged from 2000 to 2010, but it has fallen to 18 percent as of 2023. Persons in the 25 to 44 age group, which is typically most closely correlated with having young children, constituted about 36 percent of the total population in 2000, but fell to 29 percent in 2010, and 26 percent by 2023. Meanwhile, the population age 45 to 64 years of age has grown significantly faster than the other age cohorts increasing from 17 percent of the total population in 2000 to 26 percent in 2023.

TABLE 6
DEMOGRAPHIC TRENDS – AGE

	2000 Census	2010 Census	2020 Census	2023 Estimate	2000-2010 Total	2000-2010 Change*	2010-2020 Total	2010-2020 Change*	2020-2023 Total	2020-2023 Change*
Population	135,012	184,433	211,394	218,391	49,421	3.2%	26,961	1.4%	6,997	1.1%
By Age:										
Age 0-4	10.0%	7.4%	6.7%	6.5%	104	0.1%	598	0.4%	65	0.2%
Age 5-13	16.9%	15.8%	13.1%	12.4%	6,327	2.5%	-1,339	-0.5%	-618	-0.7%
Age 14-17	6.3%	7.1%	6.2%	6.0%	4,678	4.5%	62	0.0%	-91	-0.2%
Age 18-24	7.7%	8.6%	9.0%	9.1%	5,431	4.3%	3,217	1.9%	919	1.6%
Age 25-44	36.4%	29.0%	26.7%	26.1%	4,482	0.9%	2,900	0.5%	422	0.2%
Age 45-64	16.8%	23.5%	25.4%	26.0%	20,604	6.7%	10,444	2.2%	3,122	1.9%
Age 65 Up	6.1%	8.7%	12.8%	13.8%	7,795	6.9%	11,078	5.4%	3,177	3.8%

Sources: U.S. Bureau of the Census, 2000, 2010, 2020 and 2022; ACS, 2023; Applied Economics, 2024.
* Annual compound rate of change.

The housing occupancy rate in 2023 at 92.5 percent is down slightly from 2020 when it was 93.2 percent as shown in **Table 7**. The percentage of owner-occupied housing has fallen from 78 percent in 2000 to 64 percent in 2023 as the town has matured and the number of multifamily units increased. Multifamily units currently account for 21 percent of the housing stock, versus 15.5 percent in 2000.

TABLE 7
DEMOGRAPHIC TRENDS – HOUSING UNITS

	2000 Census	2010 Census	2020 Census	2023 Estimate	2000-2010 Total	2000-2010 Change*	2010-2020 Total	2010-2020 Change*	2020-2023 Total	2020-2023 Change*
Housing Units	47,996	69,306	79,324	83,647	21,310	3.7%	10,018	1.4%	4,323	1.8%
Occupied	92.8%	91.4%	93.2%	92.5%	18,828	3.6%	10,538	1.5%	3,455	1.5%
Owner	78.1%	67.2%	65.6%	64.0%	9,076	2.2%	5,493	1.1%	1,496	0.9%
Renter	14.7%	24.3%	27.6%	28.5%	9,752	9.1%	5,045	2.7%	1,959	2.9%
Vacant	7.2%	8.6%	6.8%	7.5%	2,482	5.6%	-520	-0.9%	868	5.1%
By Unit Type:										
Single Family	84.5%	83.5%	81.1%	79.0%	17,272	3.6%	6,457	1.1%	1,819	0.9%
Multifamily	15.5%	16.5%	18.9%	21.0%	4,038	4.4%	3,561	2.7%	2,504	5.3%

Sources: U.S. Bureau of the Census, 2000, 2010, 2020 and 2022; ACS, 2023; Applied Economics, 2024.
* Annual compound rate of change.

There is a strong correlation between householder age and the presence of children in a household. Since 2000, the share of householders aged 25 to 45 years, generally considered the prime elementary parenting age group, has dropped from 56 percent to 33.5 percent in 2023 (**Table 8**). This is another sign of an aging population that can result in fewer young children and an increase in older children (more closely associated with the 45 to 54 age group). During the same 22-year period the share of householders over 64 years of age has more than doubled, increasing from just 11 percent in 2000 to nearly 22 percent in 2023.

Since 2000, the share of owner-householders in the District has declined from 84 percent to 69 percent in 2023. The corresponding increase in the share of renter-households can have a stabilizing effect on enrollment in the near-term since these households tend to turnover more frequently and are generally replaced by households that are demographically similar (younger, possibly with young children). This contrasts with owner-households that tend to age in place, allowing children in the household to progress through the grade levels.

TABLE 8
DEMOGRAPHIC TRENDS – HOUSEHOLDS

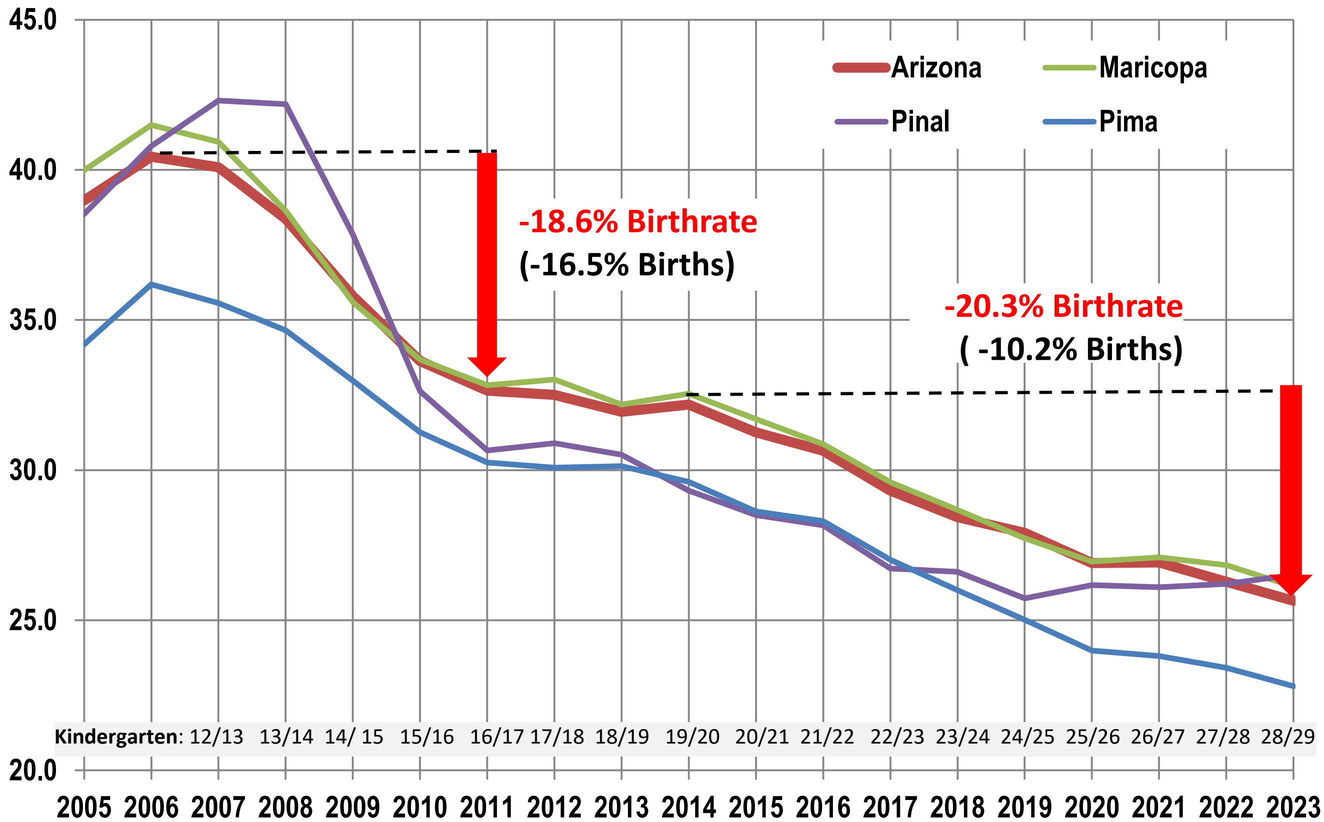
	2000 Census	2010 Census	2020 Census	2023 Estimate	2000-2010 Total	2000-2010 Change*	2010-2020 Total	2010-2020 Change*	2020-2023 Total	2020-2023 Change*
Households	44,552	63,380	73,918	77,373	18,828	3.6%	10,538	1.5%	3,455	1.5%
By Age of Householder:										
15 to 24	3.7%	3.8%	3.2%	3.1%	744	3.8%	-67	-0.3%	29	0.4%
25 to 34	26.0%	17.7%	15.9%	15.5%	-378	-0.3%	540	0.5%	262	0.7%
35 to 44	30.1%	24.8%	18.9%	17.9%	2,335	1.6%	-1,734	-1.2%	-131	-0.3%
45 to 54	19.2%	23.8%	22.4%	22.2%	6,498	5.8%	1,535	1.0%	566	1.1%
55 to 64	10.1%	15.0%	19.0%	19.7%	5,021	7.8%	4,520	4.0%	1,196	2.8%
65 to 74	6.7%	8.7%	12.0%	12.5%	2,571	6.4%	3,362	4.9%	742	2.7%
Over 75	4.2%	6.2%	8.5%	9.2%	2,037	7.6%	2,383	4.9%	792	4.0%
Owners by Age:	84.1%	73.5%	70.4%	69.2%	9,076	2.2%	5,493	1.1%	1,496	0.9%
15 to 24	1.6%	1.0%	0.6%	0.5%	-73	-1.1%	-220	-4.2%	-32	-2.7%
25 to 34	20.9%	9.7%	8.1%	7.7%	-3,193	-4.1%	-124	-0.2%	-60	-0.3%
35 to 44	25.9%	17.8%	12.8%	11.9%	-250	-0.2%	-1,830	-1.8%	-290	-1.0%
45 to 54	16.7%	19.2%	16.5%	15.9%	4,749	5.1%	13	0.0%	58	0.2%
55 to 64	9.1%	12.7%	14.8%	14.9%	3,990	7.1%	2,866	3.1%	632	1.9%
65 to 74	6.1%	7.7%	10.1%	10.2%	2,175	6.1%	2,565	4.3%	467	2.0%
Over 75	3.9%	5.4%	7.6%	8.2%	1,678	7.0%	2,223	5.2%	722	4.1%
Renters by Age:	15.9%	26.5%	29.6%	30.8%	9,752	9.1%	5,045	2.7%	1,959	2.9%
15 to 24	2.2%	2.8%	2.6%	2.6%	817	6.4%	153	0.8%	62	1.1%
25 to 34	5.1%	8.0%	7.8%	7.9%	2,815	8.4%	664	1.2%	322	1.8%
35 to 44	4.2%	7.0%	6.1%	6.1%	2,585	9.1%	95	0.2%	159	1.2%
45 to 54	2.5%	4.5%	5.9%	6.3%	1,749	9.9%	1,522	4.4%	508	3.7%
55 to 64	1.0%	2.3%	4.2%	4.7%	1,031	13.1%	1,654	7.9%	564	5.7%
65 to 74	0.6%	1.1%	2.0%	2.2%	396	9.4%	797	8.2%	275	5.9%
Over 75	0.4%	0.8%	0.9%	1.0%	359	12.2%	159	2.7%	69	3.3%
Population Per	3.03	2.91	2.86	2.82	-0.12	-0.4%	-0.05	-0.2%	-0.04	-0.4%

Sources: U.S. Bureau of the Census, 2000, 2010, 2020 and 2022; ACS, 2023; Applied Economics, 2024.
* Annual compound rate of change.

Another major factor affecting enrollment is the continuing decline in the birth rate, both regionally and nationally. As shown in **Figure 4**, the birthrate (births per 1,000 for the population aged 15 to 45) in Arizona declined by 18.6 percent between 2006 and 2011 due to the recession. During that period, the annual number of births statewide fell from 102,700 to 85,100. Between 2011 and 2014 the rate was fairly stable; since then, the rate has fallen by another 20.3 percent (through 2023) resulting in a total compound rate reduction of 36 percent since 2006.

Despite the continued decline in the birth rate, the total number of births has declined less sharply since 2014 because the population aged 15 to 45 has been increasing. However, the number of births still declined another 10 percent, down to 77,800 in 2023. The impact of the declining birth rate on Kindergarten enrollment is delayed five years. As such, the statewide birthrate declines between 2006 and 2011 impacted kindergarten enrollment between 2012/13 and 2016/17. The latest drops in the birthrate will likely have a significant impact on the size of incoming kindergarten classes through at least 2028/29.

FIGURE 4
ANNUAL BIRTHRATES IN ARIZONA AND SELECTED COUNTIES: 2004 – 2023
(Births per 1,000 people aged 15 to 45 years)



Sources: Arizona Department of Health Services; U.S. Census Bureau; Applied Economics, 2024.

2.3 Alternative Providers

There are currently 15 charter schools located within the District serving close to 7,100 K-12 students, and an additional 24 charter schools operating within one mile of District boundaries that serve another 11,600 K-12 students, as listed on **Table 9**. Combined, these schools currently serve 18,700 K-12 students. The largest of the charters in the District is Eduprize Schools Gilbert, with enrollment of close to 1,400 students, followed by Legacy Traditional School-East Mesa, which currently enrolls roughly 1,000 K-8 students in the District.

The largest school located within one mile of the District's boundaries is American Leadership Academy-Gilbert North, located on Higley Road, which is home to two schools that enrolled a total of 2,400 K-12 students at the beginning of the 2023/24 school year. In addition, three other nearby charter schools currently enroll 600 or more students each.

From 2010/11 to 2021/22, total local charter enrollment more than doubled, increasing by from 9,600 K-12 students to 19,400 students over 11 years (**Table 10**). The majority of that increase (82 percent) occurred in charter schools located just outside of the District's boundaries. While not all of the students attending charter schools located in or near the District reside within the District, it is clear that charter enrollment growth has contributed to the declining District enrollment at both the elementary and high school level. However, in the past several years, charter school enrollment has started to decline year over year for the first time. Two charter schools near the District closed in 2022-23 and total charter enrollment has declined by over 1,000 students since the peak in 2019/20**.** While the 300-student decline in 2020/21 can be attributed to the anomalous effects of the pandemic, it is interesting to note that these students appear to have not returned to local charter schools. The more than 700-student loss over the past two years was driven by the closure of two small, nearby charter schools and substantial enrollment declines at three schools (Eduprize, Noah Webster and ALA Gilbert North 7-12).

Figure 5 shows that the enrollment at local charter schools is heavily concentrated in the elementary grades. Although K-8 enrollment continues to comprises the vast majority (81 percent) of the total local charter students, the share is down from roughly 86 percent in 2016/17, which had persisted for several years. Over the past five years, 9-12 enrollment in local charter schools has decreased by about 160 students, bringing the total to roughly 3,500 students, or 19 percent of total charter enrollment.

TABLE 9
ENROLLMENT IN LOCAL CHARTER SCHOOLS

School Name	Address	City	Zip	Grades Offered	Total K-12
In-District Charter Schools					
Benjamin Franklin Charter School - Gilbert	13641 S. Val Vista Drive	Gilbert	85296	K-6	623
Challenger Basic School	1315 N. Greenfield Road	Gilbert	85234	K-6	321
Desert Hills High School	1515 S. Val Vista Drive	Gilbert	85296	9-12	245
Eduprize Schools Gilbert	580 W. Melody Avenue	Gilbert	85233	K-12	1,370
Gilbert Arts Academy	862 E. Elliot Road	Gilbert	85234	K-8	169
Great Hearts Academies - Archway Arete	4525 E. Baseline Road	Gilbert	85234	K-5	537
Great Hearts Academies - Arete Prep	4525 E. Baseline Road	Gilbert	85234	6-12	554
Liberty Arts Academy	3015 S. Power Road	Mesa	85212	K-8	344
Noah Webster Schools - Mesa	7301 E. Baseline Road	Mesa	85209	K-6	492
San Tan Charter School - Recker Campus	3959 E. Elliot Road	Gilbert	85234	K-6	448
San Tan Charter School - Power Campus	3232 Power Road	Gilbert	85234	7-12	449
Legacy Traditional School - East Mesa	10707 E. Guadalupe Road	Mesa	85209	K-8	1,037
Leman Academy of Excellence-East Mesa	3761 S. Power Road	Mesa	85212	K-8	161
The French American Academy	2031 N. Arizona Avenue	Chandler	85225	K-4	48
Freedom Preparatory Academy-Mesa (online)	465 N. Bluejay Drive	Gilbert	85234	K-12	260
In-District Total					7,058
Area Charter Schools*					
American Leadership Academy - Gilbert K-6	3155 S. Santan Village Parkway	Gilbert	85295	K-6	631
American Leadership Academy - Gilbert North K-6	1010 S. Higley Road	Gilbert	85296	K-6	857
American Leadership Academy - Gilbert North 7-12	1070 S. Higley Road	Gilbert	85296	7-12	1,562
American Leadership Academy - Mesa K-6	4507 S. Mountain Road	Mesa	85212	K-6	447
AZ Compass Prep School	2020 N. Arizona Avenue	Chandler	85225	7-12	271
BASIS Mesa	5010 S. Eastmark Parkway	Mesa	85212	K-12	867
Burke Basic School	131 E. Southern Avenue	Mesa	85210	K-6	683
Great Hearts Academies - Archway Lincoln	2250 S. Gilbert Road	Chandler	85286	K-5	714
Great Hearts Academies - Lincoln Prep	2250 S. Gilbert Road	Chandler	85286	6-11	588
Imagine East Mesa Elementary	9701 E. Southern Avenue	Mesa	85208	K-6	583
Imagine East Mesa Middle	9701 E. Southern Avenue	Mesa	85208	7-8	139
Intelli-School Chandler	1727 N. Arizona Avenue	Chandler	85225	9-12	58
Leading Edge Academy Gilbert Early College	717 W. Ray Road	Gilbert	85233	9-12	198
Leading Edge Academy Gilbert Elementary	717 W. Ray Road	Gilbert	85233	K-8	304
Learning Foundation and Performing Arts - Gilbert	4055 E. Warner Road	Gilbert	85296	7-12	260
Learning Foundation and Performing Arts - Warner	3939 E. Warner Road	Gilbert	85296	K-6	299
Legacy Traditional School - North Chandler	1900 N. McQueen Road	Chandler	85225	K-8	910
Montessori Education Centre Charter School - Mesa	2834 E. Southern Avenue	Mesa	85204	K-6	257
Pathfinder Academy at Eastmark	4816 S. Eastmark Parkway	Mesa	85212	K-6	339
Sequoia Charter Elementary School	1460 S. Horne Street	Mesa	85204	K-6	304
Sequoia Secondary School	1460 S. Horne Street	Mesa	85204	7-12	381
Sun Valley High School	1143 Lindsay Road	Mesa	85204	9-12	352
Val Vista Academy	4120 S. Val Vista Drive	Gilbert	85297	K-8	399
Vector Prep & Arts Academy	2020 N. Arizona Avenue	Chandler	85225	K-6	243
Area Total					11,646
Grand Total					18,704

Source: Arizona Department of Education; Applied Economics 2024.
* Charter schools located within approximately one mile of the District's boundaries.

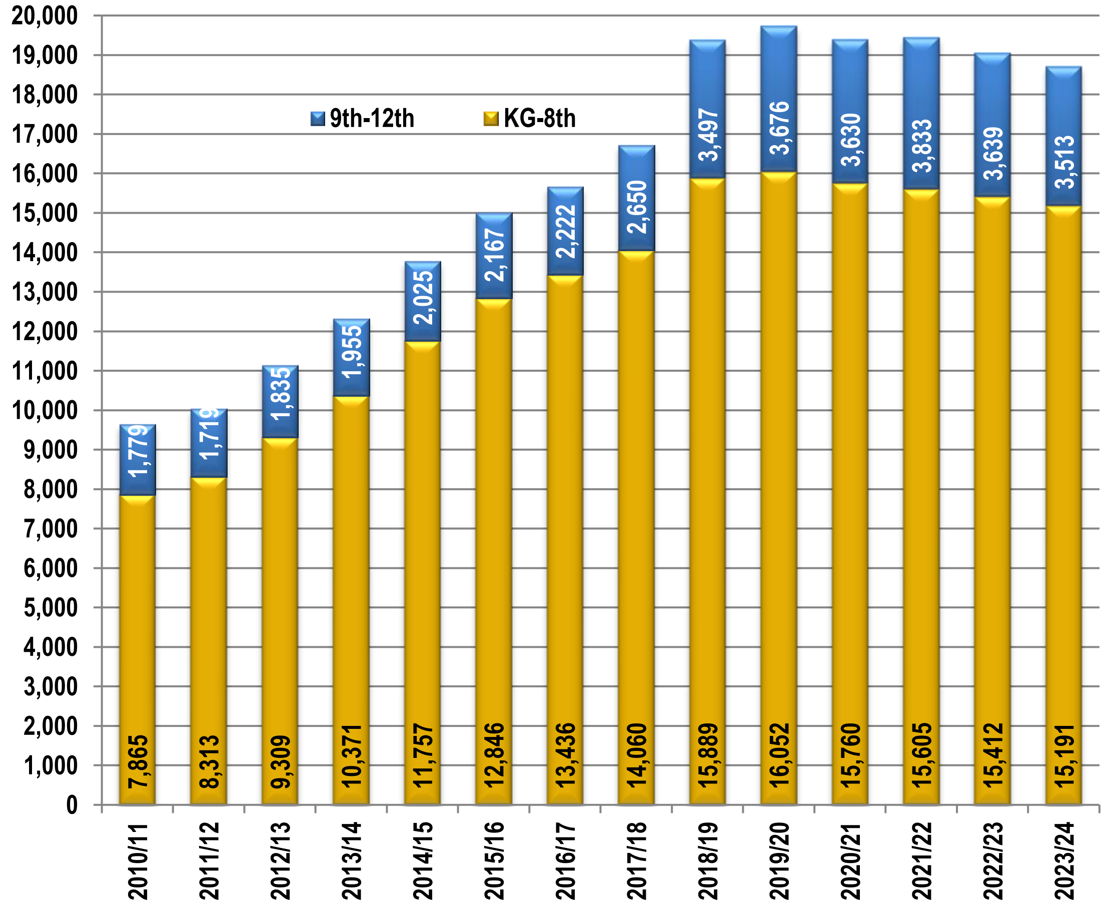
TABLE 10
ENROLLMENT IN LOCAL CHARTER SCHOOLS BY LEVEL

School Year	Number of Schools	KG-8th	Share	9th-12th	Share	KG-12	Annual Change
2010/11	14	4,868	86.7%	748	13.3%	5,616	358
2011/12	14	5,201	87.6%	738	12.4%	5,939	323
2012/13	14	5,432	87.9%	749	12.1%	6,181	242
2013/14	13	5,414	89.8%	618	10.2%	6,032	-149
2014/15	13	5,834	92.5%	470	7.5%	6,304	272
2015/16	13	6,066	91.8%	544	8.2%	6,610	306
2016/17	12	6,009	90.6%	620	9.4%	6,629	19
2017/18	12	5,680	89.6%	658	10.4%	6,338	-291
2018/19	16	6,474	87.8%	903	12.2%	7,377	1,039
2019/20	16	6,584	87.4%	950	12.6%	7,534	157
2020/21	15	6,414	87.3%	937	12.7%	7,351	-183
2021/22	15	6,308	85.9%	1,037	14.1%	7,345	-6
2022/23	15	6,125	85.8%	1,014	14.2%	7,139	-206
2023/24	15	5,998	85.0%	1,060	15.0%	7,058	-81
Area Charter Schools*							
2010/11	13	2,997	74.4%	1,031	25.6%	4,028	
2011/12	13	3,112	76.0%	981	24.0%	4,093	65
2012/13	15	3,877	78.1%	1,086	21.9%	4,963	870
2013/14	18	4,957	78.8%	1,337	21.2%	6,294	1,331
2014/15	21	5,923	79.2%	1,555	20.8%	7,478	1,184
2015/16	23	6,780	80.7%	1,623	19.3%	8,403	925
2016/17	24	7,427	82.3%	1,602	17.7%	9,029	626
2017/18	25	8,380	80.8%	1,992	19.2%	10,372	1,343
2018/19	25	9,415	78.4%	2,594	21.6%	12,009	1,637
2019/20	26	9,468	77.6%	2,726	22.4%	12,194	185
2020/21	26	9,346	77.6%	2,693	22.4%	12,039	-155
2021/22	26	9,297	76.9%	2,796	23.1%	12,093	54
2022/23	24	9,287	78.0%	2,625	22.0%	11,912	-181
2023/24	-15	9,193	78.9%	2,453	21.1%	11,646	-266
Total							
2010/11	27	7,865	81.6%	1,779	18.4%	9,644	
2011/12	27	8,313	82.9%	1,719	17.1%	10,032	388
2012/13	29	9,309	83.5%	1,835	16.5%	11,144	1,112
2013/14	31	10,371	84.1%	1,955	15.9%	12,326	1,182
2014/15	34	11,757	85.3%	2,025	14.7%	13,782	1,456
2015/16	36	12,846	85.6%	2,167	14.4%	15,013	1,231
2016/17	36	13,436	85.8%	2,222	14.2%	15,658	645
2017/18	37	14,060	84.1%	2,650	15.9%	16,710	1,052
2018/19	41	15,889	82.0%	3,497	18.0%	19,386	2,676
2019/20	42	16,052	81.4%	3,676	18.6%	19,728	342
2020/21	41	15,760	81.3%	3,630	18.7%	19,390	-338
2021/22	41	15,605	80.3%	3,833	19.7%	19,438	48
2022/23	39	15,412	80.9%	3,639	19.1%	19,051	-387
2023/24	39	15,191	81.2%	3,513	18.8%	18,704	-347

Source: Arizona Department of Education; Applied Economics 2024.

* Charter schools located within approximately one mile of the District's boundaries.

FIGURE 5
DISTRIBUTION OF TOTAL CHARTER ENROLLMENT BY LEVEL



Source: Arizona Department of Education; Applied Economics, 2024.

In addition to charter schools, there are six private schools operating in the District that enroll approximately 470 students (up from 440 in 2022/23), and two private schools located within roughly one mile of the District's boundary that enroll nearly 1,600 K-12 students (**Table 11**). The largest of these schools, Gilbert Christian School, operates just outside of the District (near the Loop 202) and currently enrolls 1,470 K-12 students, up from less than 1,300 students one year earlier.

While private school enrollment historically remained relatively steady, the number of students living in the District with Empowerment Scholarship Accounts (ESAs) has risen from 373 in Q1 of SY2022, to 1,198 in Q1 of SY2023 to 2,463 in Q1 of SY2024. Most early new recipients were already attending a private school, so the impact on district enrollment was small. However, that is changing as time goes on, and it is likely that district school enrollment, and potentially charter school enrollment, will be negatively impacted by increased utilization of the ESA program. Kindergarten and 1st grade students living in the District currently make up the largest share of ESA recipients.

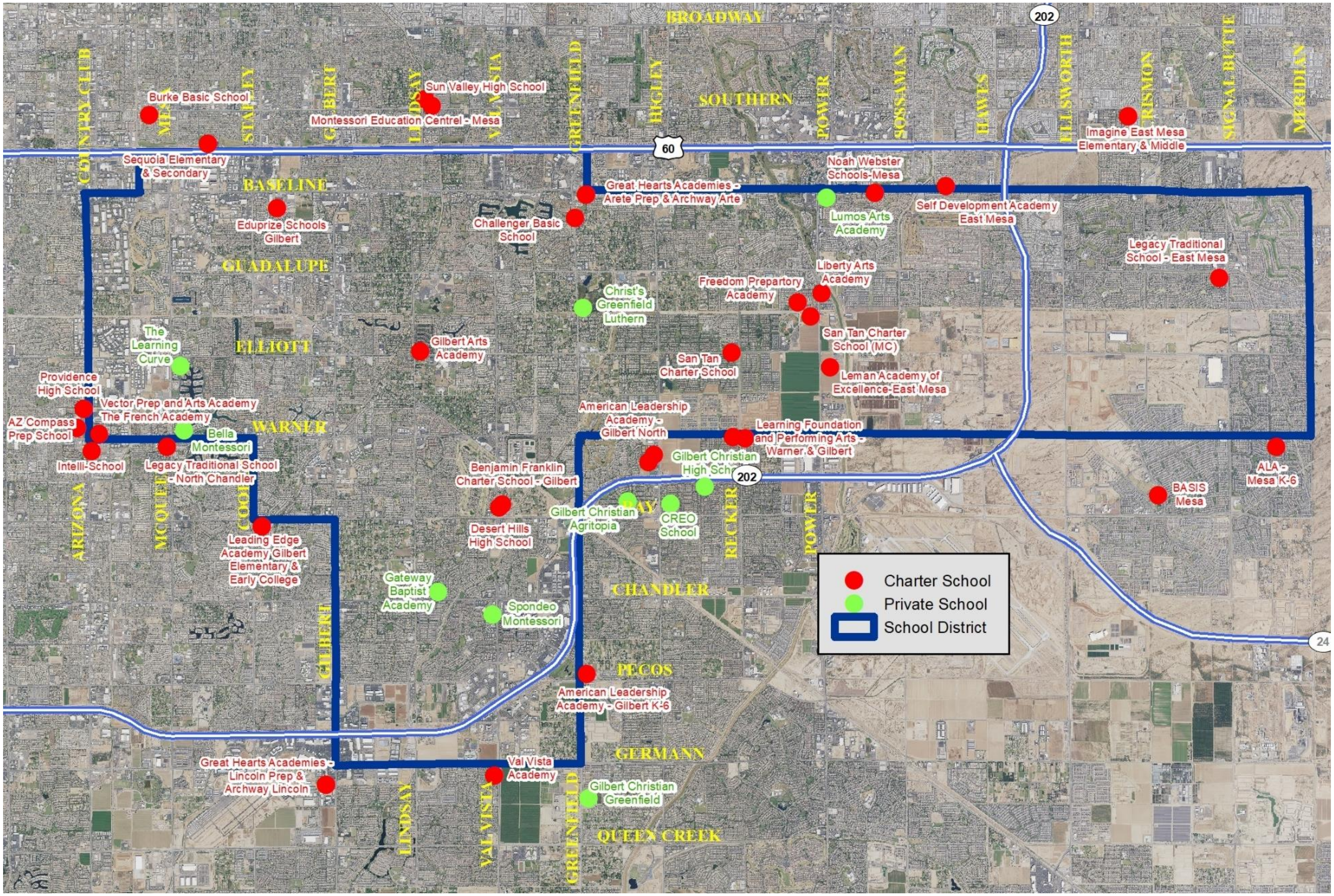
TABLE 11
ENROLLMENT IN LOCAL PRIVATE SCHOOLS

School Name	Address	City	Zip	Grades Offered	Total K-12
In-District Private Schools					
Bella Montessori	700 S. Islands Drive West	Gilbert	85233	PK-K	4
Christ's Greenfield Lutheran School	425 N. Greenfield Road	Gilbert	85234	PK-8	249
Gateway Baptist Academy	2175 S. Gilbert Road	Gilbert	85295	K-12	42
Spondeo Preschool	2680 S. Val Vista Drive	Gilbert	85295	PK-K	3
Lumos Arts Academy	919 E. Guadalupe Road	Gilbert	85234	K-12	160
Wilkins Learning Center	730 S. Cooper Road	Gilbert	85233	PK-K	12
In-District Total					470
Area Private Schools*					
Gilbert Christian Schools	3632 E. Jasper Drive	Gilbert	85296	PK-12	1,470
Creo Montessori School	1475 S. Higley Road	Gilbert	85296	PK-6	153
Area Total					1,623
Total					2,093

Sources: NCES Private School Universe Survey (PSS), 2021-22 school year data; Private School Review, 2024; Applied Economics 2023.
* Private schools located within approximately one mile of the District's boundaries.

The locations of all local, non-District (charter and private) schools are shown on **Map 5**. As is typical, many of these alternative providers are located in close proximity to major transportation corridors and in areas with higher population densities. The data suggests that there is a complex flow of students in the area, both incoming and outgoing, between District, neighboring public districts, charter schools and private schools.

MAP 5
AREA CHARTER AND PRIVATE SCHOOLS



3.0 Residential Development

3.1 Market Conditions

Historic population growth in Arizona is shown in **Table 12**. Economic conditions that drive job-based in-migration fluctuate from year to year, such as the 2007-2009 decline due to the recession that was followed by a rebound in job and population growth from 2015 to 2019. Population increases in 2023 were generally higher than historic levels, but slightly below annual changes in 2022 in the Sun Corridor counties. As the Phoenix metro area matures, residential growth is increasingly occurring in the outer suburbs, both in western Maricopa County and in Pinal County.

TABLE 12
POPULATION GROWTH IN THE SUN CORRIDOR

Population	1990	1995	2000	2005	2010	2015	2020	2021	2022	2023
Maricopa County	2,132,273	2,498,964	3,092,927	3,577,074	3,824,083	4,076,400	4,436,704	4,507,419	4,586,431	4,665,020
Pima County	668,187	750,399	848,375	940,004	981,015	1,005,920	1,045,589	1,058,318	1,072,298	1,080,300
Pinal County	116,996	143,933	182,435	250,195	375,541	387,993	428,220	439,128	453,924	467,459
Yavapai County	108,647	133,151	169,520	196,629	210,919	218,182	237,073	241,173	245,389	248,899
Arizona	3,682,913	4,279,799	5,175,581	5,924,476	6,398,985	6,701,021	7,176,401	7,285,370	7,409,189	7,525,113
Average Annual Change	**1985-1990**	**1990-1995**	**1995-2000**	**2000-2005**	**2005-2010**	**2010-2015**	**2015-2020**	**2021**	**2022**	**2023**
Maricopa County	70,245	73,338	118,793	96,829	49,402	50,463	72,061	70,715	79,012	78,589
Pima County	18,163	16,442	19,595	18,326	8,202	4,981	7,934	12,729	13,980	8,002
Pinal County	3,171	5,387	7,700	13,552	25,069	2,490	8,045	10,908	14,796	13,535
Yavapai County	4,987	4,901	7,274	5,422	2,858	1,453	3,778	4,100	4,216	3,510
Arizona	112,075	119,377	179,156	149,779	94,902	60,407	95,076	108,969	123,819	115,924

Source: Arizona Commerce Authority; U.S. Bureau of the Census; Applied Economics, 2024.

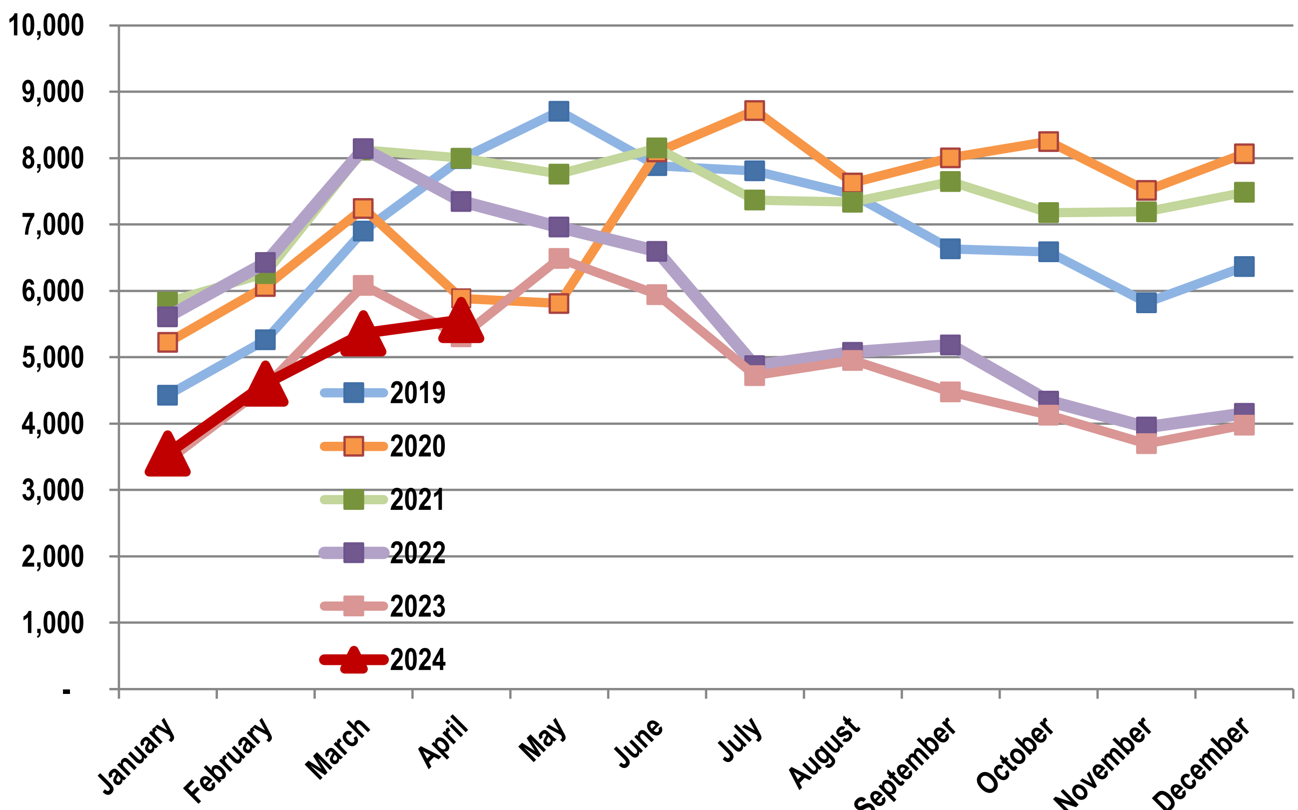
Employment growth is the primary driver for in-migration in the Phoenix metro area. During 2023, the civilian labor force in Arizona grew by 91,400 persons including 74,900 new workers in the Phoenix metropolitan area, according to the Bureau of Labor Statistics. The unemployment rate was 3.9 percent statewide, and 3.5 percent in the Phoenix metro region as the annual average for 2023, following much higher unemployment in 2020 and 2021. Substantial growth has occurred in the Manufacturing, Information, Business Services, and Education and Health Services, which offer more stability and higher wages than Hospitality and Personal Service jobs.

During the pandemic, tech companies worldwide grew by 2.3 times more than non-tech companies. Phoenix has been ranked as one of the top emerging ecosystems in the world based on early-stage venture capital funding, according to a report by Startup Genome. Technology-based companies and suppliers can now be found in all parts of the metropolitan region with new facilities planned and under construction. In addition, the Phoenix metro area has had a significant increase in manufacturing projects versus advanced business services industries that dominated economic development in the region for the past decade.

Population growth and strong economic conditions create housing demand, but high mortgage rates and limited supply have created problems for the market. Elevated mortgage rates cause two problems: they make borrowing costs too high for some purchasers, and they dissuade some people from selling since they could be exchanging a low rate on their existing mortgage for a higher rate on a new one. This is part of the reason for the limited supply, which in turn drives up prices for houses that would also have higher borrowing costs. The shortage of existing inventory for sale is also driving demand for new construction. And while the extent of the issue is not fully known, investments in houses for short-term rentals also removes supply for more permanent households, essentially replacing houses with hotel rentals.

Figure 6 tracks total sales of single family houses in the region by year. The typical pattern is for sales to increase in the spring then level out over the summer before falling off during the last months of the year. In 2020 this pattern was distorted by the COVID pandemic that caused an abrupt decline in the Spring, but was then followed by stronger sales the remainder of the year.

FIGURE 6
SALES OF SINGLE FAMILY HOMES

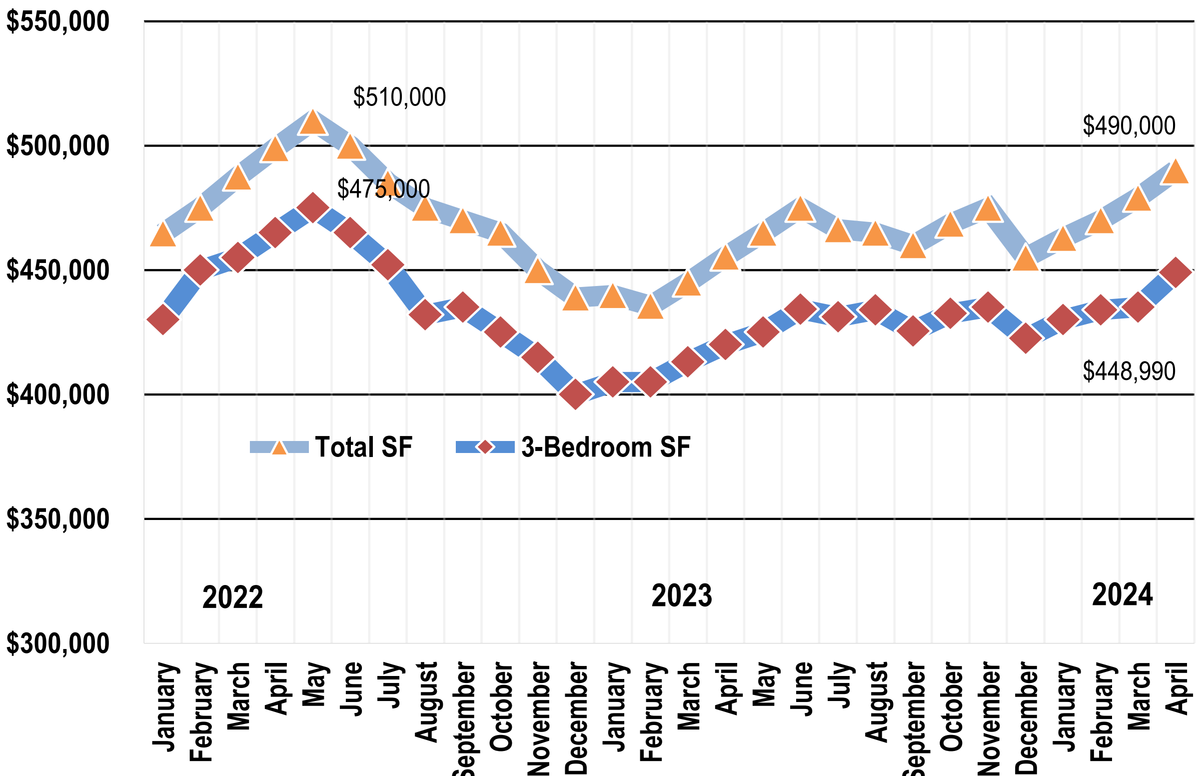


Source: Arizona Regional Multiple Listing Service, 2019-2024.

In 2021, the sales pattern returned to normal, although with sales still at elevated levels. In 2022, the combined impact of mortgage rates and high prices, along with the lack of inventory, sent sales downward after the normal Springtime surge. In 2023, this pattern repeated, but with more volatility, which seems to be the case in 2024 as well. Sales in 2024 have been improving, despite impediments, much like 2019 so far.

Sales prices on existing houses began escalating again in early 2023, after a long decline through most of 2022 (**Figure 7**). Both total and 3-bedroom prices are shown below; the total includes high-end custom houses while the standard 3-bedroom house is most relevant for households with school-age children. The purchase price of houses is of obvious importance for buyers, but the mortgage rate is also a major factor. High interest rates and elevated but fluctuating prices has affected stability in the market. Builders have utilized various approaches to improve affordability for new construction, but to really strengthen the market for all buyers will require that mortgage interest rates decline and stabilize enough to provide buyers with confidence in moving forward with purchases.

FIGURE 7
SALE PRICES OF SINGLE-FAMILY HOMES



Source: Arizona Regional Multiple Listing Service, 2022 - 2024.

While financial issues are current concerns, water supply is gaining interest as a long-term factor for continued growth in the metro region. Water availability is an obvious growth factor in a desert location during a long-term drought, and one that has been and continues to be addressed by the Groundwater Management Act in effect since 1980. The news reports sound dire, but actually **only refer to a 4 percent effect over the next 100 years on developments relying solely on groundwater.** Most of the metro area draws from multiple sources, not just groundwater. Even though water supply augmentation will be necessary for continued long-term growth, recent news stories have tended to omit ameliorating factors such as future land use changes, new conservation techniques, and diverse water supplies. While new efforts are needed, including more investment in infrastructure such as reservoir expansion, the Phoenix metro area has policies in place to assure adequate water for future growth.

3.2 Housing Construction

District housing construction activity over the past decade is shown in **Table 13**, measured by building permits. Housing categories are used to correlate new units to the age structure of the households likely to occupy them. In general, younger households tend to occupy single family housing built at higher densities, which usually have lower purchase prices. Estate housing, at the lowest density levels, tend to have older householders, with older children. Student population per housing unit rates are associated with the unit type. Group quarter facilities, such as nursing homes or dormitories, are not included as either retirement or multifamily housing.

TABLE 13
HOUSING PERMITS

Housing Type	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	Total
Family Housing											
Single Family 2 du/ac or less	11	10	8	14	2	-	-	18	6	2	71
Single Family 2.01 - 3.5 du/ac	175	122	150	162	56	161	250	177	71	50	1,374
Single Family 3.51 - 4.5 du/ac	121	239	196	235	393	161	221	206	225	102	2,099
Single Family 4.51 - 6 du/ac	-	107	308	251	102	181	342	112	-	2	1,405
Single Family 6.01du/ac & Over	2	91	93	117	52	35	64	101	37	37	629
Single Family Attached	-	-	-	6	70	140	151	258	118	147	890
Total Single Family	309	569	755	785	675	678	1,028	872	457	340	6,468
Condominium/Townhouse	26	42	7	31	15	-	8	-	-	2	131
Rental SF/BTR	-	-	-	116	40	-	369	165	-	166	856
Standard Courtyard Apts	524	200	278	687	-	-	-	216	205	352	2,462
Urban/Lifestyle Apts	254	148	238	252	104	297	380	859	-	689	3,221
Total Multifamily	804	390	523	1,086	159	297	757	1,240	205	1,209	6,670
Total Non-Age-Restricted	1,113	959	1,278	1,871	834	975	1,785	2,112	662	1,549	13,138
Age-Restricted Housing											
Single Family 2.01 - 3.5 du/ac	55	85	63	98	16	8	-	-	-	-	325
Single Family 3.51 - 4.5 du/ac	7	6	8	-	29	39	3	-	-	-	92
Single Family 4.51 - 6 du/ac	-	-	-	-	-	-	-	-	-	-	-
Single Family 6.01du/ac & Over	31	22	39	-	-	-	-	-	-	-	92
Single Family Attached	30	27	8	-	-	-	22	-	-	-	87
Condominium/Townhouse	-	-	-	20	52	55	2	-	-	-	129
Total Age-restricted	123	140	118	118	97	102	27	-	-	-	725
Total	1,236	1,099	1,396	1,989	931	1,077	1,812	2,112	662	1,549	13,863

Sources: Construction Monitor; Maricopa Association of Governments; Maricopa County Assessor; Applied Economics, 2024.

Over the past ten years housing permits have been divided fairly evenly between single family and multifamily housing units, with single family having a slight edge. About a third of the single family houses have been in the 3.5 to 4.5 lots per acre category, with another 40 percent split between the density ranges just above and below. Estate housing, on half-acre lots or larger, have not been a significant factor in the local market. Higher density single family has been a part of the local housing mix in recent years, with attached single family becoming a significant component in the last five years.

Multifamily construction has been overwhelmingly in high amenity, "luxury" apartment complexes. This has been the most common type of multifamily development in the metro region for several years. Elevated land and borrowing costs have led to high-density construction to maximize unit counts along with extensive amenities with corresponding high rents. Locations along major transportation corridors or near entertainment and retail centers are also commonly associated with such complexes, and the District has several such growth nodes. There has been little development of single family rental complexes that have become so popular elsewhere in the metro area, with fewer than a thousand units.

Table 14 shows non-age-restricted, single family permitting over the past three years by quarter. In 2021, production levels were high, with ongoing construction at Eastmark, Morrison Ranch, and Warner Meadows. In 2022 and 2023, activity was lower as Eastmark and Morrison Ranch were building out, but though lower, construction was stable as activity was shifting from Warner Meadows to the opening of Hawes Crossing, that will be the last master plan in the District.

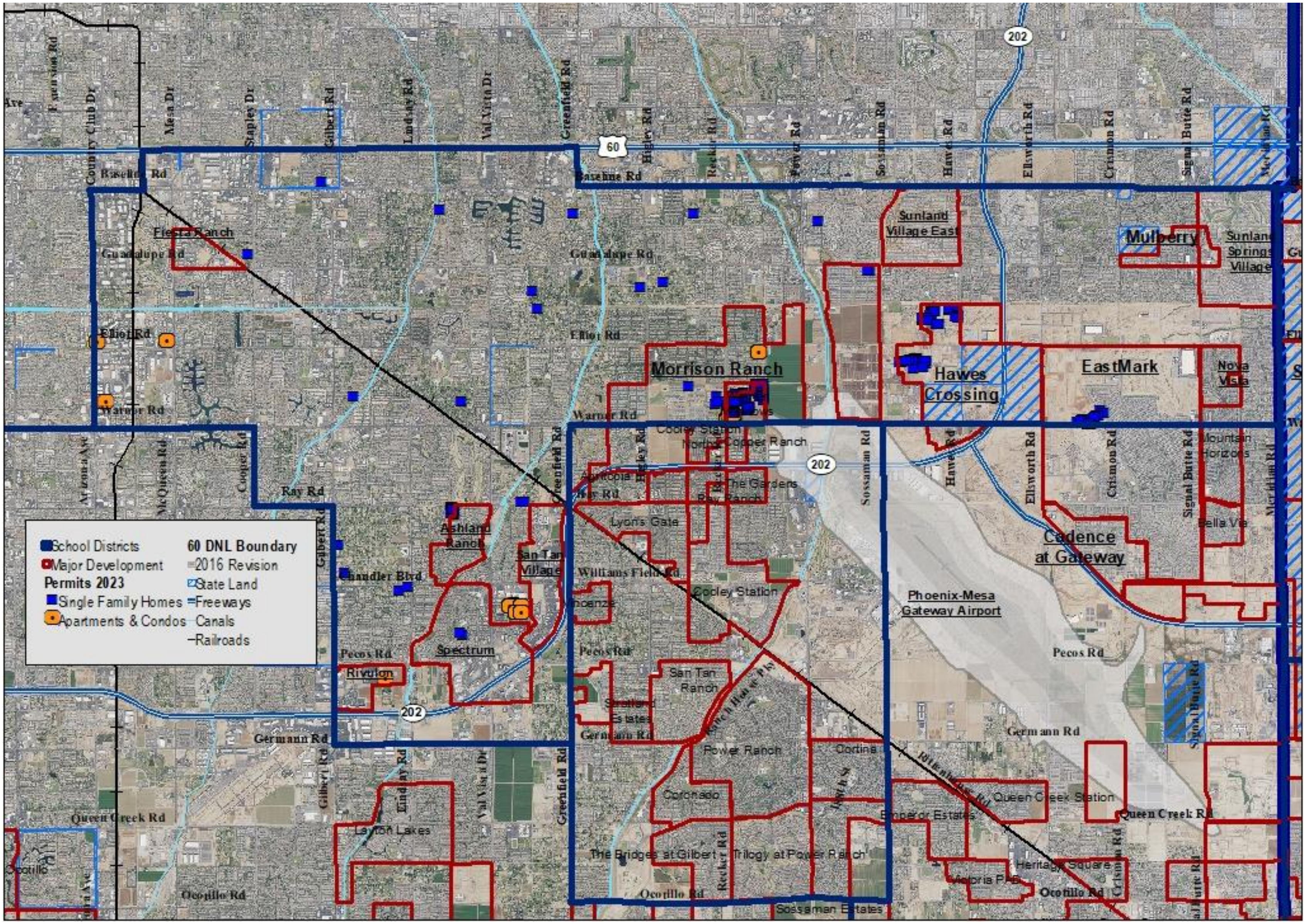
TABLE 14
SINGLE FAMILY HOUSING PERMITS BY QUARTER

	2021					**2022**					**2023**				
Housing Type	Qtr 1	Qtr 2	Qtr 3	Qtr 4	**Total**	Qtr 1	Qtr 2	Qtr 3	Qtr 4	**Total**	Qtr 1	Qtr 2	Qtr 3	Qtr 4	**Total**
Single Family 2 du/ac or less	6	4	-	5	**15**	1	-	1	-	**2**	-	1	-	-	**1**
Single Family 2.01 - 3.5 du/ac	57	45	25	14	**141**	17	15	13	15	**60**	14	8	17	10	**49**
Single Family 3.51 - 4.5 du/ac	62	24	38	42	**166**	84	61	28	12	**185**	22	40	36	18	**116**
Single Family 4.51 - 6 du/ac	-	-	-	-	**-**	-	-	-	-	**-**	-	2	4	56	**62**
Single Family 6.01du/ac & Over	36	27	5	-	**68**	16	16	16	13	**61**	-	8	4	-	**12**
Single Family Attached	47	78	52	58	**235**	8	-	-	57	**65**	40	50	32	16	**138**
Total Single Family	208	178	120	119	**625**	126	92	58	97	**373**	76	109	93	100	**378**

Sources: Construction Monitor; Maricopa Association of Governments; Maricopa County Assessor; Applied Economics, 2024.

Map 6 shows development activity in the District in 2021/22 with markers for individual building permits. Most new single family activity has been in the eastern portion of the District at master planned communities, with scattered infill construction in the west. Multifamily construction has been less concentrated, with activity at Morrison Ranch, San Tan Village, and along the Arizona Avenue corridor.

MAP 6
RESIDENTIAL PERMITTING



3.3 Residential Development

3.3.1 Future Development Potential

Potential housing supply in the District is estimated in **Table 15**, categorized by the type of housing and according to the general time period during which vertical construction is expected to begin. The timing categories only indicate the start of construction for a project and are not related to the level or rate, both of which can vary widely for many reasons. The Infill category could include rural parcels, single lots in existing neighborhoods, and small custom projects. The number of units, type, and timing estimates will frequently be adjusted as new or more detailed information becomes available.

Past construction has been nearly evenly divided between single family and multifamily housing but this parity is rapidly coming to an end. In a mature local housing market with very limited remaining land for residential growth, future potential is estimated to be over 70 percent multifamily, most of it in high-amenity, high-rent, high-density properties.

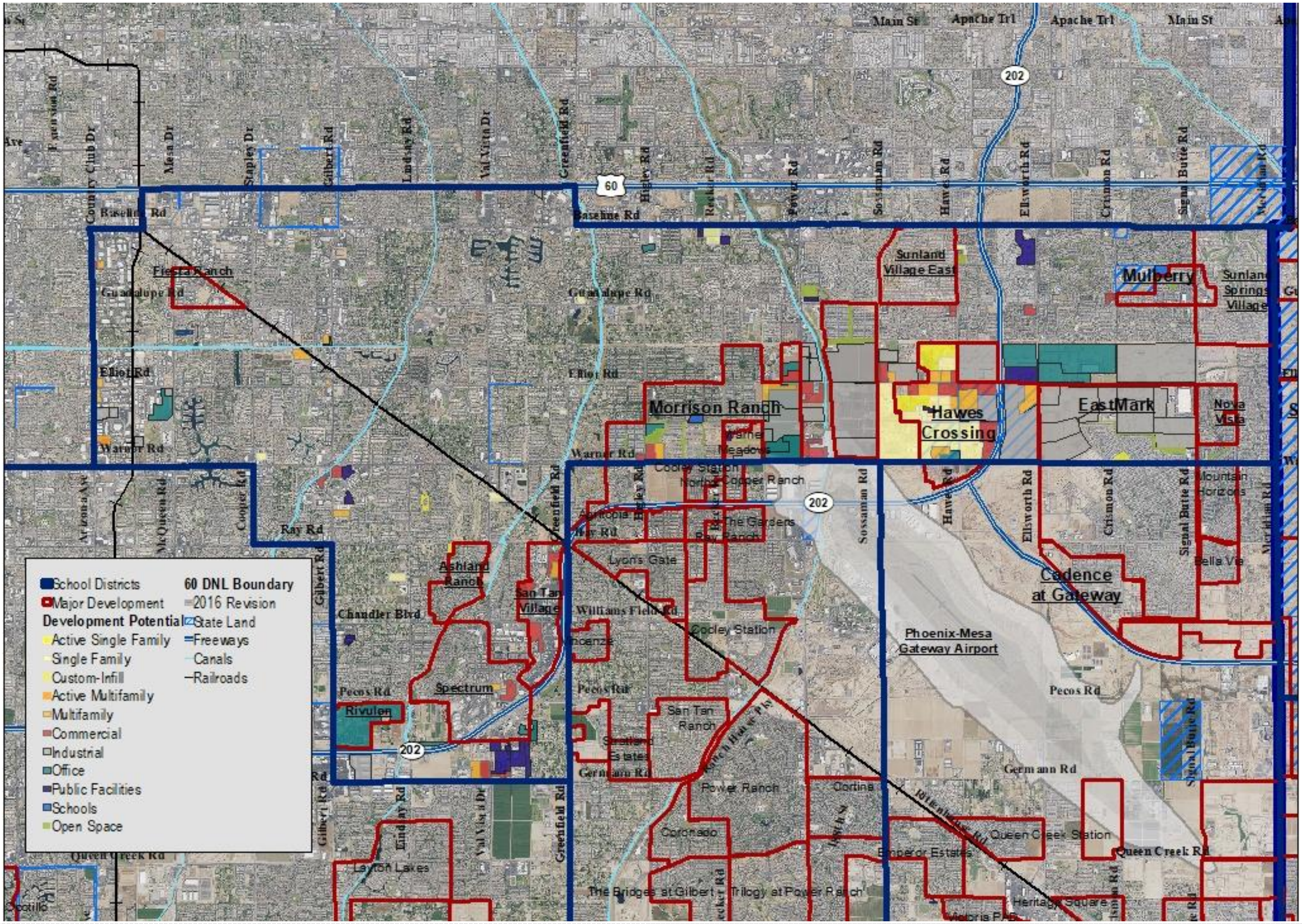
TABLE 15
POTENTIAL NEW HOUSING BY DEVELOPMENT TIMELINE

	Existing		Vacant Land				
Housing Type	Infill	Projects	1 Year	2-3 Years	3-5 Years	5-10 Years	Total
Single Family 2 du/ac or less	1	-	10	13	-	246	270
Single Family 2.01 - 3.5 du/ac	-	2	-	23	8	-	33
Single Family 3.51 - 4.5 du/ac	770	1	-	128	92	-	991
Single Family 4.51 - 6 du/ac	-	508	-	578	276	86	1,448
Single Family 6.01du/ac & Over	-	-	-	127	280	-	407
Single Family Attached	-	98	-	58	138	-	294
Total Single Family	771	609	10	927	794	332	3,443
Condominium/Townhouse	90	-	18	-	50	-	158
Rental SF/BTR	-	-	-	234	90	220	544
Standard Courtyard Apts	-	-	-	-	200	1,630	1,830
Urban/Lifestyle Apts	-	147	234	1,667	1,554	3,660	7,262
Total Multifamily	90	147	252	1,901	1,894	5,510	9,794
Total	861	756	262	2,828	2,688	5,842	13,237

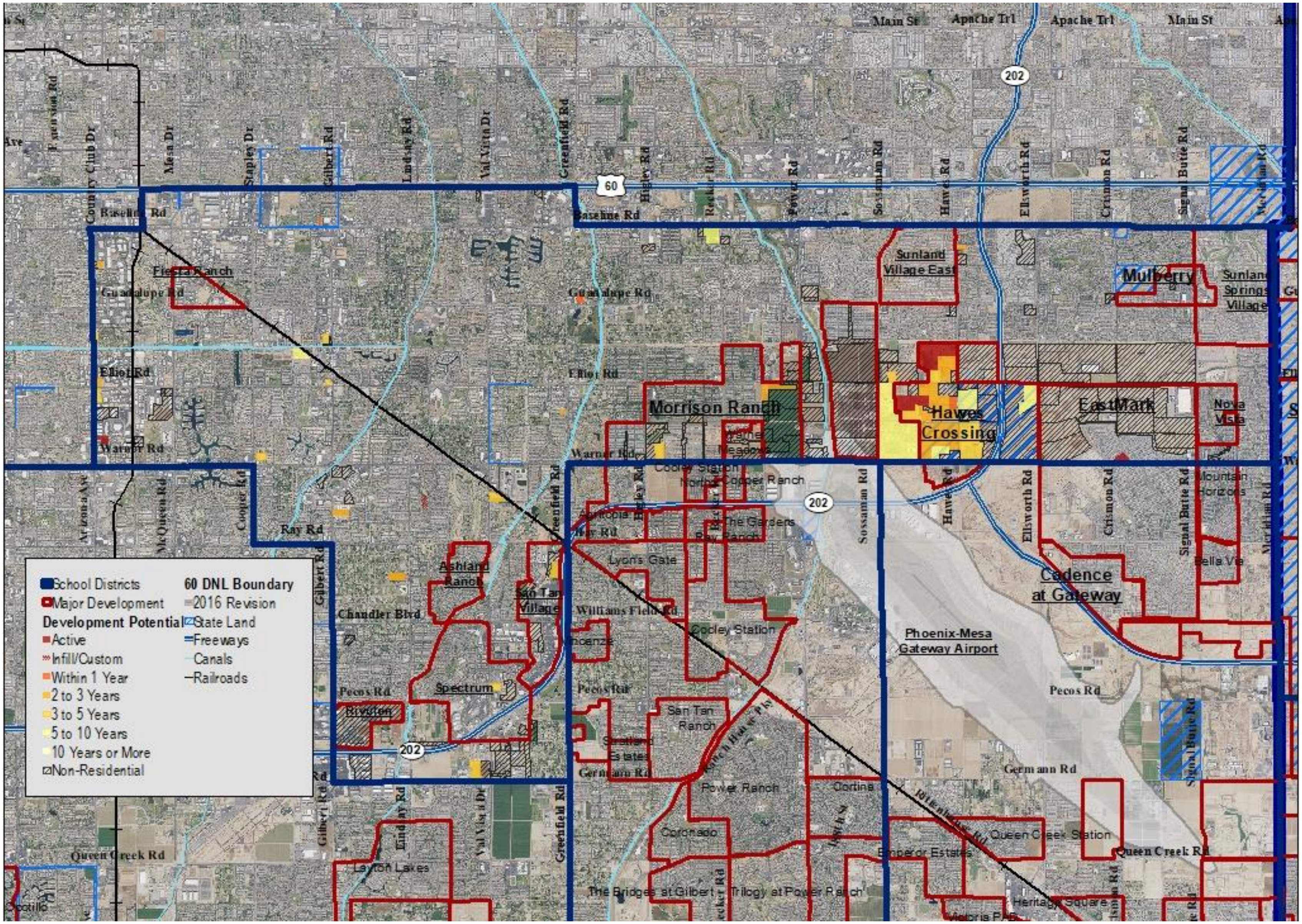
Sources: City of Mesa, Town of Gilbert; Applied Economics, 2024.

Future land use and development timing is illustrated in the following maps (**Maps 7 and 8**). Most new growth will be at or around Hawes Crossing at the Loop 202 and Elliot Road. Other multifamily will be added at various sites throughout the District.

MAP 7
FUTURE LAND USE



MAP 8
DEVELOPMENT TIMING



Housing diversity lends stability to the local market since economic disruptions don't affect all types in the same manner or degree. A variety also provides for differing household structures and ages. In general, smaller and less costly housing tends to attract younger householders with younger children while the move-up market typically attracts somewhat older households. A balanced market will have all types of housing and age groups, allowing buyers to move within the same area as circumstances change. Without choices available families may not remain in a community, and local household age-structure levels may be unbalanced.

Table 16 shows pricing in or near the District. The list is not comprehensive but is meant to indicate overall housing market characteristics and the range of pricing available. As of April 2024, regional MLS pricing for sales of existing 3-bedroom houses was $448,990 with a median of $490,000 for single family houses of any size. In the District, new construction houses average $556,000, with resales somewhat higher. While there are some entry-level offerings, this is largely a move-up market.

TABLE 16
NEW HOUSING CHARACTERISTICS AT SELECTED SUBDIVISIONS

Builder	Subdivision	Models offered	Sq. Ft. Min	Beds Min	Price Min	Sq. Ft. Max	Beds Max	Price Max
Brookfield	Blossom Rock: Mariposa	5	2,363	3	$ 585,697	3,488	5	NA
David Weekley	Blossom Rock: Escena	7	2,376	2	$ 669,990	3,251	4	$ 769,990
D. R. Horton	Radiance: Tradition	19	1,333	3	$ 410,990	2,444	5	$ 544,990
Lennar Homes	Hawes Crossing: Reflection	3	1,746	3	$ 452,490	2,074	4	$ 472,490
	Hawes Crossing: Discovery	3	2,246	4	$ 527,990	2,679	5	$ 558,490
	Hawes Crossing: Horizon	3	2,233	5	$ 545,990	2,525	4	$ 598,990
	Blossom Rock: Horizon	3	2,233	5	$ 530,990	2,524	4	$ 560,990
	Blossom Rock: Signiture	3	2,375	4	$ 570,990	2,647	4	$ 606,990
Pulte Homes	Blossom Rock: Cactus	5	1,671	3	$ 479,990	3,344	4	$ 619,990
	Blossom Rock: Canyon	4	2,473	3	$ 589,990	3,578	5	$ 689,990
Taylor Morrison	Hawes Crossing: Venture I	4	1,630	3	$ 460,990	2,409	4	$ 515,990
	Hawes Crossing: Discovery	6	1,715	3	$ 514,990	2,961	5	$ 615,990
	Hawes Crossing: Encore	6	1,938	3	$ 548,990	3,568	5	$ 679,990
	Hawes Crossing: Landmark	6	1,977	3	$ 565,990	3,495	4	$ 689,990
Tri Pointe Homes	Blossom Rock	5	3,081	4	$ 646,000	3,453	5	$ 729,000
Woodside Homes	Eastmark: Elegance	6	2,889	3	$ 798,990	4,611	6	$ 998,990

Source: Builder websites; Applied Economics, May 22-23, 2024.

RESALE HOUSING CHARACTERISTICS BY ZIP CODE

Zip Code	Active Listings		Median List Price	Days on Market	Median Rent	Median price / sq ft
85233	121		$ 589,950	32	$ 1,750	$ 298
85234	171		$ 569,000	43	$ 2,400	$ 316
85296	187		$ 599,000	35	$ 2,000	$ 283
Total	479	Avg	$ 585,983	37	$ 2,050	$ 299

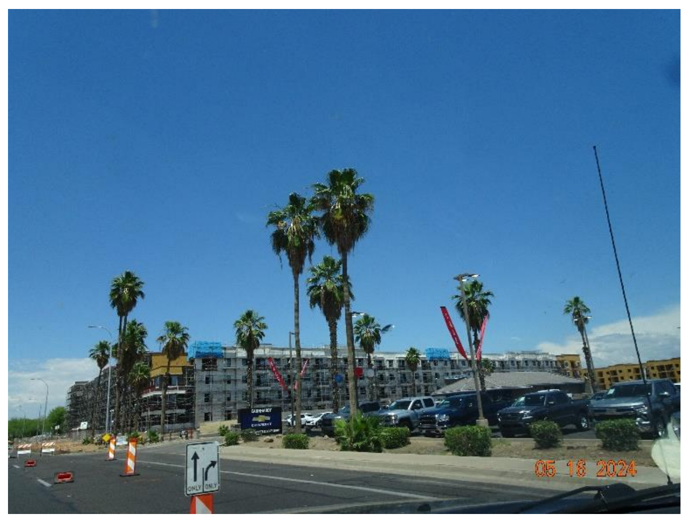
Source: Realtor.com; Applied Economics, May 22, 2024.

3.3.2 Development Projects

The residential market has been negatively impacted by elevated construction costs, persistently high mortgage interest rates, and shortages of inventory due to higher interest rates versus the lower rates on most existing mortgages. While the lack of existing houses on the market helps promote new construction, the impediments to purchasing slow the market overall, though less in some areas than others. Although these market issues have persisted, sales have increased as demand remains strong and people have grown more accustomed to the higher interest rates. Public builders have also worked to lower construction costs and have utilized financial assistance, mainly with interest rates, in order to keep sales moving forward.

New single family construction is expected to remain stable near current levels with about 350 to 450 starts per year over the next few years as Hawes Crossing ramps up production while Warner Meadows builds out. In the last half of the projection period, new single family additions will be mostly limited to single lots and small infill projects. There are few remaining large parcels of land in the District, and most of them are planned for industrial or data center uses. Those types of projects have been moving ahead strongly in recent years, such as the new 185-acre data center campus under construction at Sossaman and Elliot Roads. This level of activity reduces the motivation to change land use in order to speed new development as occurred in the past.

Multifamily additions in the District can be expected to continue as employment levels continue to increase. (Right – Alta Uptown) The recent surge of apartment construction in the Phoenix metro area is leading to some decline in rents, and a slowing in sales of apartment properties. Projects already advanced in planning are expected to progress, but some may experience delays. The District is a strong market, but is not attracting expensive high-rise properties, and overall activity levels are not likely to be seriously affected.



During the next five years, single family housing will account for about 35 percent of total residential additions, primarily with production at Hawes Crossing. Multifamily housing will continue to be a major housing component with numerous sites at Hawes Crossing and elsewhere. In the second half of the projection period, land for single family growth will be largely exhausted and multifamily should account for approximately 80 percent of new residential additions.

Eastmark: Woodside Homes; Warner and Ellsworth Roads; 940 estimated total lots – 10 remaining.
Since opening in 2013 as the real estate market was just beginning to recover from the 2007-09 recession, this very successful master plan is nearly complete. There are fewer than 300 lots remaining in the subdivisions to the south, outside the District, and those should be finishing this year. In total this development has 6,800 single family lots and over 6,500 are completed.

Hawes Crossing: Lennar, Taylor Morrison, Blandford Homes; Hawes and Elliot Roads; 1,880 estimated total lots – 1,810 remaining.

New model construction started around mid-2023, with permitting active at 5 subdivisions by the end of the year. Both Lennar (Left) and Taylor Morrison (Below right) are offering multiple product lines, including small-lot models. Both builders are also providing extensive on-site amenities. Blandford Homes was the successful bidder at a State Land auction in June 2023 for 115 acres. Planning is underway, but it is expected there will be around 450 single family lots with three or four sizes. Pricing is not known but will likely be somewhat higher than current builders. House construction is expected to commence in late 2025 or early 2026.

This master plan is in an excellent location with freeway access and close proximity to major employment nodes. All three builders involved are respected and are offering multiple options to buyers. It is expected that the project will be very successful with strong production levels. Nearly all the single family land is already builder-owned, but there are also significant parcels of land planned for multifamily or mixed use. This component is also likely to be successful, though construction will extend well beyond the single family timeline. It is uncertain whether the multifamily will attract families with children, or primarily young, single professionals.

Superstition Vistas

This master plan is located adjacent to the District in the Apache Junction District. It is a massive project with 2,783 acres in phase one purchased in 2021, with over 10,000 lots planned and total production forecast to be 1,000 to 1,200 houses per year. In summary, it is larger than Eastmark, and while it is close to the District, it is not close to Apache Junction schools. Current plans include a Great Hearts Academy to be opened in fall 2026 with a second school likely to follow fairly quickly. Phase 1 started along Ray Road and will progress north to Elliot Road.

This project is starting at a time when demand remains high, employment opportunities in the area are expanding, and other major nearby developments including Eastmark, Morrison Ranch, Cadence at Gateway are either built out, or are approaching completion. The two sections, Radiance and Blossom Rock, total about 10,000 lots, and if there is not a severe economic disruption, buildout should occur within a decade. There is an embargo until 2027 on developing adjacent land, but there is already some consideration that it may be raised before that. Future development will be confronted with very large infrastructure costs due to the CAP that may cause some delay, but would not discontinue future growth in the area.

Radiance at Superstition Vistas: D.R. Horton; Ray and Meridian Roads; 5,000 estimated total lots – 4,500 remaining.

This project opened in 2023 and more than 250 houses had been sold between June to December. As of mid-2024 there have been approximately 500 to 600 closings (not necessarily occupancy). There are currently six active subdivisions with about 700 lots with land development underway on the next section for construction. The company tends to have numerous offerings but limited customization, which keeps prices lower than many other builders. This is a positive factor for families with children. This is a high volume builder that will likely construct 500 or more houses per year.

Blossom Rock at Superstition Vistas: Brookfield Residential, Lennar, Tri Pointe, Pulte, David Weekley; Ray and Ironwood Roads; 5,000 estimated total lots – 4,800 remaining.

New housing construction began in early 2024 with the grand opening April 2024. Prices will generally be higher than at Radiance, especially with some of the builders involved. Houses will be larger, and the playgrounds definitely indicate families with children are expected. Brookfield was a developer at Eastmark so they have a positive record of accomplishment with this type of master plan, and strong demand has already been reported. Lennar will be the first builder with closings, starting June 2024, with other builders following with closings in August or September. This means there will be some children present by the start of the 2024/25 school year, though probably not a large number.

4.0 District Projections

4.1 Population & Housing

Table 17 provides annual housing, household and population projections for the District through 2033/34 based on the annual absorption of new housing units and real estate market and demographic trends. The housing unit construction schedule developed for the 10-year projection period is based on recent and forecast construction trends, land availability and ownership, and data reflecting local economic growth trends. The projections call for the addition of 10,500 housing units over the next ten years, a 13 percent increase over the 83,600 units that currently make up the District's housing inventory. The vast majority (72 percent) of new units added during the projection period are expected to be multifamily. By 2033/34 the District's housing inventory is expected to total more than 94,100 units.

TABLE 17
HISTORIC AND PROJECTED POPULATION AND HOUSING

		Housing Units				Occupancy	Households		
Year	Population	Total*	New	New SF	New MF	Rate	Total	Change	Pop/HH
2010/11	**184,433**	**69,306**	**431**	**431**	**0**	**91.4%**	**63,380**	**250**	**2.910**
2011/12	**185,671**	**69,658**	**352**	**352**	**0**	**91.6%**	**63,822**	**442**	**2.909**
2012/13	**187,585**	**70,341**	**683**	**408**	**275**	**91.8%**	**64,569**	**747**	**2.905**
2013/14	**188,884**	**70,771**	**430**	**323**	**107**	**92.0%**	**65,086**	**517**	**2.902**
2014/15	**191,405**	**71,869**	**1,098**	**432**	**666**	**92.1%**	**66,220**	**1,134**	**2.890**
2015/16	**194,334**	**72,968**	**1,099**	**709**	**390**	**92.3%**	**67,359**	**1,139**	**2.885**
2016/17	**198,033**	**74,364**	**1,396**	**873**	**523**	**92.5%**	**68,777**	**1,418**	**2.879**
2017/18	**201,548**	**75,853**	**1,489**	**903**	**586**	**92.7%**	**70,286**	**1,509**	**2.868**
2018/19	**204,324**	**76,784**	**931**	**772**	**159**	**92.8%**	**71,283**	**997**	**2.866**
2019/20	**207,382**	**77,861**	**1,077**	**780**	**297**	**93.0%**	**72,418**	**1,136**	**2.864**
2020/21	**211,394**	**79,324**	**1,463**	**905**	**558**	**93.2%**	**73,918**	**1,500**	**2.860**
2021/22	**213,694**	**81,036**	**1,712**	**1,022**	**840**	**92.7%**	**75,120**	**1,202**	**2.845**
2022/23	**216,518**	**82,098**	**1,062**	**457**	**605**	**92.9%**	**76,269**	**1,149**	**2.839**
2023/24	**218,391**	**83,647**	**1,549**	**340**	**1,209**	**92.5%**	**77,373**	**1,104**	**2.823**
2024/25	220,863	84,623	976	354	622	92.8%	78,530	1,157	2.812
2025/26	223,320	85,291	668	418	250	93.3%	79,577	1,046	2.806
2026/27	225,090	87,012	1,721	420	1,301	92.7%	80,660	1,084	2.791
2027/28	227,146	88,788	1,776	407	1,369	92.2%	81,863	1,202	2.775
2028/29	229,315	90,202	1,414	470	944	92.0%	82,986	1,123	2.763
2029/30	231,318	91,421	1,219	431	788	91.9%	84,016	1,030	2.753
2030/31	233,094	92,401	980	171	809	92.0%	85,009	993	2.742
2031/32	234,618	92,754	353	67	286	92.5%	85,797	789	2.735
2032/33	236,162	93,533	779	59	720	92.7%	86,705	908	2.724
2033/34	237,638	94,112	579	99	480	93.0%	87,524	819	2.715
2024/25 - 2033/34			10,465	2,896	7,569			10,151	

Source: Applied Economics, 2024.
Bolding indicates historical estimates.

The increased presence of multifamily housing could attract younger families to the District; however, the majority of the units planned are targeted to young, working professionals, empty-nesters and retirees. Although population per household is expected to decline over the next ten years due to the aging of the population and the influx of multifamily units, 10,500 new households are projected to yield a total District population of more than 237,600 people by 2033/34, which represents an increase of 9 percent compared to 2023/24.

4.2 Enrollment

In addition to the volume and market orientation of household growth, trends in per-household student generation, the Enrollment-Population ratio and the Service Rate are key factors used in determining future enrollment. The first factor, student generation rate, refers to the expected number of school-age persons (aged 5 to 17 years old) per household. As shown in **Table 18**, roughly 40,300 school-age persons currently reside in the District, implying an average generation rate of 0.52 school-age persons per household. This rate has fallen by 26 percent since 2000/01 due to the aging of the existing population, the addition of multifamily housing and newer, more expensive single family housing that has attracted older households with fewer school-age children.

TABLE 18
SCHOOL-AGE POPULATION, TOTAL ENROLLMENT AND E-P RATIO

Year	Households	School-Age Population * Total	School-Age Population * Per HH	K-12 Enrollment	Difference	Enrollment - Pop. Ratio
2000/01	44,552	31,245	0.701	29,174	2,071	0.934
2005/06	60,797	41,680	0.686	36,986	4,694	0.887
2010/11	63,380	42,250	0.667	37,977	4,273	0.899
2011/12	63,822	41,767	0.654	37,884	3,883	0.907
2012/13	64,569	41,483	0.642	37,599	3,884	0.906
2013/14	65,086	41,051	0.631	37,294	3,757	0.908
2014/15	66,220	41,003	0.619	36,529	4,474	0.891
2015/16	67,359	40,946	0.608	35,624	5,322	0.870
2016/17	68,777	41,044	0.597	35,022	6,022	0.853
2017/18	70,286	41,177	0.586	34,542	6,635	0.839
2018/19	71,283	40,998	0.575	34,352	6,646	0.838
2019/20	72,418	40,890	0.565	34,544	6,346	0.845
2020/21	73,918	40,974	0.554	33,149	7,825	0.809
2021/22	75,120	40,773	0.543	33,432	7,341	0.820
2022/23	76,269	40,534	0.531	33,017	7,517	0.815
2023/24	77,373	40,265	0.520	32,050	8,215	0.796

Source: Applied Economics, 2024.
* Population age 5 through 17, corresponds with Kindergarten through 12th grade.

The second factor affecting enrollment projections is the ratio between the District's K-12 enrollment and the number of school-age persons living in the District, referred to herein as the Enrollment-Population (E-P) ratio. Due to the growing number of educational alternatives and open enrollment policies, the E-P ratio has become increasingly important when preparing enrollment projections. Assuming a school-age population of 40,265 and total enrollment of 32,050 students results in a difference of 8,214 students and a District E-P ratio of 0.796, or 79.6 percent in 2023/24. Please note that the E-P ratio is based on the net difference between the school-age population and *total District enrollment*. This difference includes the loss of some 14,000 in-District school-age persons to other providers and the gain of roughly 5,800 students at District schools from outside of the District.

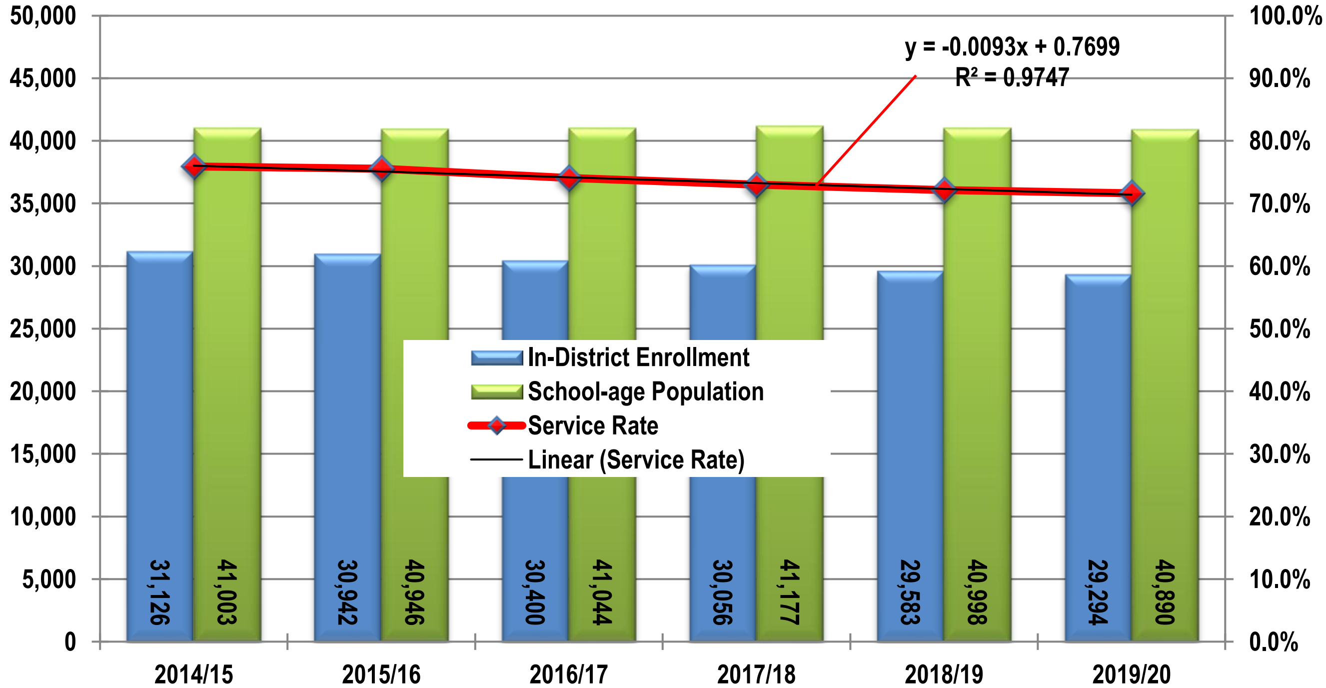
Enrollment ratios can also be used to assess how successful the District is in enrolling the school-age population that resides within the District. This is done by eliminating students that are enrolled, but live outside of the District's boundaries, from the total. Referred to as the "service rate", this ratio is based on the difference between the school-age population and *in-District enrollment*. In 2023/24, in-District enrollment totaled nearly 26,300 students, resulting in a difference of about 14,000 persons and a service rate of 65.2 percent, which is considerably lower than the E-P ratio (79.6 percent) that is based on the District's total enrollment. Since 2014/15, the service rate has decreased by 14 percent, including the sharp pandemic-induced decrease in 2020/21 (**Table 19**). Since 2014/15, the District's service rate has declined by an average of 1.6 percent per year, as shown in **Figures 8 and 9**.

TABLE 19
SCHOOL-AGE POPULATION, IN-DISTRICT ENROLLMENT AND SERVICE RATE

Year	School-Age Population * Total	Per HH	K-12 Enrollment	Enrollment - Pop. Ratio	Out of District K-12	Share	In-district K-12 Enrollment	In-district Difference	Service Rate
2014/15	41,003	0.619	36,529	0.891	5,403	14.8%	31,126	9,877	75.9%
2015/16	40,946	0.608	35,624	0.870	4,682	13.1%	30,942	10,004	75.6%
2016/17	41,044	0.597	35,022	0.853	4,622	13.2%	30,400	10,644	74.1%
2017/18	41,177	0.586	34,542	0.839	4,486	13.0%	30,056	11,121	73.0%
2018/19	40,998	0.575	34,352	0.838	4,769	13.9%	29,583	11,415	72.2%
2019/20	40,890	0.565	34,544	0.845	5,250	15.2%	29,294	11,596	71.6%
2020/21	40,974	0.554	33,149	0.809	5,541	16.7%	27,608	13,366	67.4%
2021/22	40,773	0.543	33,432	0.820	5,640	16.9%	27,792	12,981	68.2%
2022/23	40,534	0.531	33,017	0.815	5,862	17.8%	27,155	13,379	67.0%
2023/24	40,265	0.520	32,050	0.796	5,794	18.1%	26,256	14,009	65.2%

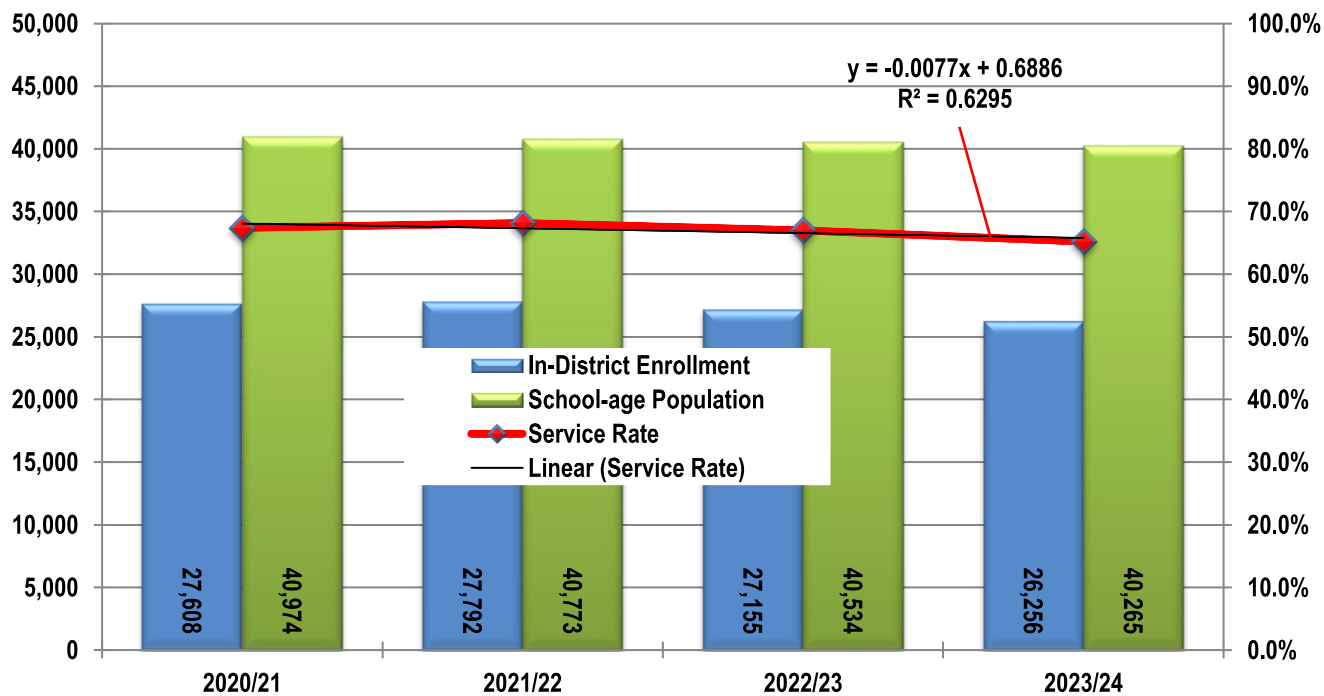
Source: Applied Economics, 2024.
* Population age 5 through 17, corresponds with Kindergarten through 12th grade.

FIGURE 8
PRE-PANDEMIC SERVICE RATE TRENDS



Sources: Gilbert Unified School District; Applied Economics.

FIGURE 9
POST-PANDEMIC SERVICE RATE TRENDS



Sources: Gilbert Unified School District; Applied Economics.

The service rate may fluctuate upward or downward depending on the real or perceived quality of education offered by the District, the number, convenience, and perceived value of other education options, and a myriad of other factors that are beyond the scope of this study. However, we are not aware of any school districts in Arizona that have experienced a significant service rate increase over the past fifteen years, and nearly all have experienced some level of decline. As a result, the enrollment projections in this analysis have been formulated under three scenarios.

The "Trend" scenario assumes that the service rate declines at the rate it did between 2014/15 and 2019/20 (pre-pandemic), or about 0.93 percent per year. The "Stable" scenario assumed the service rate remains at about the current level it has been the last three years (post-pandemic), about 0.0056 percent per year. Finally, the "Mid" scenario uses a service rate that reflects the mid-point between the Trend and Stable service rate scenarios.

Despite the projected addition of nearly 10,200 households by 2033/34, the school-age population per household is expected to decline slowly throughout the 10-year period. When the projected school-age population is combined with a falling service rate, each scenario projects a decline in in-District enrollment by 2033/34, although the rate of decline varies (**Table 20**).

TABLE 20
ALTERNATIVE SERVICE RATE IN-DISTRICT ENROLLMENT PROJECTION SCENARIOS

	School-Age	Service Rate			In-District Enrollment			Enrollment Change		
Year	Population	Trend*	Mid	Stable	Trend	Mid	Stable	Trend	Mid	Stable
2014/15	**41,003**	**75.9%**	**75.9%**	**75.9%**	**31,126**	**31,126**	**31,126**			
2015/16	**40,946**	**75.6%**	**75.6%**	**75.6%**	**30,942**	**30,942**	**30,942**	**-184**	**-184**	**-184**
2016/17	**41,044**	**74.1%**	**74.1%**	**74.1%**	**30,400**	**30,400**	**30,400**	**-542**	**-542**	**-542**
2017/18	**41,177**	**73.0%**	**73.0%**	**73.0%**	**30,056**	**30,056**	**30,056**	**-344**	**-344**	**-344**
2018/19	**40,998**	**72.2%**	**72.2%**	**72.2%**	**29,583**	**29,583**	**29,583**	**-473**	**-473**	**-473**
2019/20	**40,890**	**71.6%**	**71.6%**	**71.6%**	**29,294**	**29,294**	**29,294**	**-289**	**-289**	**-289**
2020/21	**40,974**	**67.4%**	**67.4%**	**67.4%**	**27,608**	**27,608**	**27,608**	**-1,686**	**-1,686**	**-1,686**
2021/22	**40,773**	**68.2%**	**68.2%**	**68.2%**	**27,792**	**27,792**	**27,792**	**184**	**184**	**184**
2022/23	**40,534**	**67.0%**	**67.0%**	**67.0%**	**27,155**	**27,155**	**27,155**	**-637**	**-637**	**-637**
2023/24	**40,265**	**65.2%**	**65.2%**	**65.2%**	**26,256**	**26,256**	**26,256**	**-899**	**-899**	**-899**
2024/25	40,131	63.5%	64.3%	65.1%	25,480	25,799	26,118	-776	-457	-138
2025/26	39,934	62.1%	63.5%	65.0%	24,779	25,357	25,941	-701	-442	-177
2026/27	39,749	60.6%	62.8%	65.0%	24,090	24,951	25,828	-689	-406	-113
2027/28	39,615	59.6%	62.3%	65.0%	23,628	24,676	25,753	-462	-275	-75
2028/29	39,436	58.9%	62.0%	65.1%	23,246	24,442	25,680	-382	-234	-73
2029/30	39,207	58.3%	61.6%	65.1%	22,846	24,163	25,536	-400	-279	-144
2030/31	38,956	58.0%	61.4%	65.0%	22,602	23,921	25,303	-244	-242	-233
2031/32	38,610	57.7%	61.3%	65.1%	22,284	23,664	25,116	-318	-257	-187
2032/33	38,316	56.9%	60.8%	65.0%	21,799	23,303	24,893	-485	-361	-223
2033/34	37,982	56.5%	60.6%	65.0%	21,442	23,017	24,687	-357	-286	-206
2024/25 - 2033/34								-4,814	-3,239	-1,569

Source: Applied Economics, 2024.
Bolding indicates historical estimates.
* Based on average rate of decline from 2020/21 through 2023/24.

As the presence of alternative providers has grown, the service rate has increasingly become one of the most important factors affecting projections, and in many school districts it is the most important factor in determining enrollment. For discussion purposes, the analyses presented in the remainder of this report are based on the assumptions presented using the Mid service rate scenario.

Table 21 provides a more detailed review of past and projected total enrollment changes by level based on the Mid service rate scenario, including a Kindergarten to 6th grade (K-6), 7th to 8th grade (7-8) and 9-12 cohort summation. Assuming a moderate service rate decline and a slight increase in out-of-District enrollment, the District is expected to experience a loss of about 2,700 students by 2033/34 (9 percent), yielding total enrollment of 29,300 K-12 students at the end of the projection period. Enrollment is expected to decline in each of the next 10 years, dropping by an average of 0.9 percent per year during the projection period.

TABLE 21
ENROLLMENT PROJECTIONS BY LEVEL: MID SERVICE RATE SCENARIO

	Enrollment by Level				K-12 Total			Share by Level		
Fall	K-6	7-8	K-8	9-12	Enrollment	Change	% Change	K-6	7-8	9-12
2000/01	**16,243**	**4,600**	**20,843**	**8,331**	**29,174**			**56%**	**16%**	**29%**
2005/06	**19,540**	**6,120**	**25,660**	**11,326**	**36,986**			**53%**	**17%**	**31%**
2010/11	**19,043**	**6,552**	**25,595**	**12,382**	**37,977**	**-315**	**-0.8%**	**50%**	**17%**	**33%**
2011/12	**19,019**	**6,469**	**25,488**	**12,396**	**37,884**	**-93**	**-0.2%**	**50%**	**17%**	**33%**
2012/13	**18,649**	**6,472**	**25,121**	**12,478**	**37,599**	**-285**	**-0.8%**	**50%**	**17%**	**33%**
2013/14	**18,137**	**6,408**	**24,545**	**12,749**	**37,294**	**-305**	**-0.8%**	**49%**	**17%**	**34%**
2014/15	**17,537**	**6,191**	**23,728**	**12,801**	**36,529**	**-765**	**-2.1%**	**48%**	**17%**	**35%**
2015/16	**16,883**	**5,924**	**22,807**	**12,817**	**35,624**	**-905**	**-2.5%**	**47%**	**17%**	**36%**
2016/17	**16,629**	**5,710**	**22,339**	**12,683**	**35,022**	**-602**	**-1.7%**	**47%**	**16%**	**36%**
2017/18	**16,581**	**5,657**	**22,238**	**12,304**	**34,542**	**-480**	**-1.4%**	**48%**	**16%**	**36%**
2018/19	**16,468**	**5,673**	**22,141**	**12,211**	**34,352**	**-190**	**-0.6%**	**48%**	**17%**	**36%**
2019/20	**16,530**	**5,731**	**22,261**	**12,283**	**34,544**	**192**	**0.6%**	**48%**	**17%**	**36%**
2020/21	**15,507**	**5,479**	**20,986**	**12,163**	**33,149**	**-1,395**	**-4.0%**	**47%**	**17%**	**37%**
2021/22	**15,901**	**5,341**	**21,242**	**12,190**	**33,432**	**283**	**0.9%**	**48%**	**16%**	**36%**
2022/23	**15,818**	**5,124**	**20,942**	**12,075**	**33,017**	**-415**	**-1.2%**	**48%**	**16%**	**37%**
2023/24	**15,352**	**5,004**	**20,356**	**11,694**	**32,050**	**-967**	**-2.9%**	**48%**	**16%**	**36%**
2024/25	15,120	5,073	20,193	11,450	31,643	-407	-1.3%	48%	16%	36%
2025/26	14,877	5,207	20,084	11,167	31,251	-392	-1.2%	48%	17%	36%
2026/27	14,435	5,350	19,785	11,110	30,895	-356	-1.1%	47%	17%	36%
2027/28	14,136	5,368	19,504	11,166	30,670	-225	-0.7%	46%	18%	36%
2028/29	13,622	5,422	19,044	11,442	30,486	-184	-0.6%	45%	18%	38%
2029/30	13,212	5,453	18,665	11,592	30,257	-229	-0.8%	44%	18%	38%
2030/31	13,102	5,081	18,183	11,882	30,065	-192	-0.6%	44%	17%	40%
2031/32	13,048	4,810	17,858	12,000	29,858	-207	-0.7%	44%	16%	40%
2032/33	13,077	4,751	17,828	11,719	29,547	-311	-1.0%	44%	16%	40%
2033/34	13,124	4,683	17,807	11,504	29,311	-236	-0.8%	45%	16%	39%

Source: Applied Economics, 2023.
Bolding indicates historical estimates.

The vast majority of the 10-year decline (81 percent) is driven by the loss of roughly 2,200 K-6 students, which represents an enrollment decline of 14.5 percent compared to 2023/24. Net enrollment losses in 7-8 and 9-12 enrollment are also projected by 2033/34, although unlike the K-6 cohort some annual upward fluctuations are expected during the 10-year period.

By 2033/34, 7-8 enrollment is projected to total roughly 4,700 students, down 6.4 percent (320 students) compared to 2023/24. Some annual 7-8 enrollment increases are expected during the first half of the projection period; however, these gains are completely offset by annual losses during the second five-year period.

In the coming years, enrollment in the 9-12 cohort will be less affected by new housing additions as increases that might have been expected due to construction are offset by the advancement of smaller in-coming classes. In addition, recent trends suggest that the effect of alternative providers on high school enrollment could be more significant than in the past, although the decline in 9-12 enrollment is projected to be less than the decline in other grade levels. As a result, 9-12 enrollment is projected to decline by an average of 0.15 percent per year during the projection period, dropping to 11,500 students by 2033/34, and representing an enrollment decline of 1.6 percent (190 students) compared to 2023/24.

5.0 Sub-District Enrollment Projections

Sub-District enrollment projections are based on the current number of students in each study grid, the expected occupancy of existing housing units and absorption of new housing units, and the expected student generation from existing and newly created households. Expected levels of District-wide absorption are allocated to new residential developments on a project-by-project basis. Absorption is first allocated to active residential projects and then to vacant land planned for residential development, according to the development schedule assigned to each project or project part. Using this data, annual projections of enrollment by grade through 2033/34 for each grid area were developed.

The grid-level projections are then aggregated by attendance area and used to cross-check the District enrollment projections. Matrices showing the relationship between where students live and where they attend school are provided for each elementary, middle and high school attendance area. Finally, these relationships are combined with the attendance area projections to forecast enrollment by school.

5.1 Planning Grid Projections

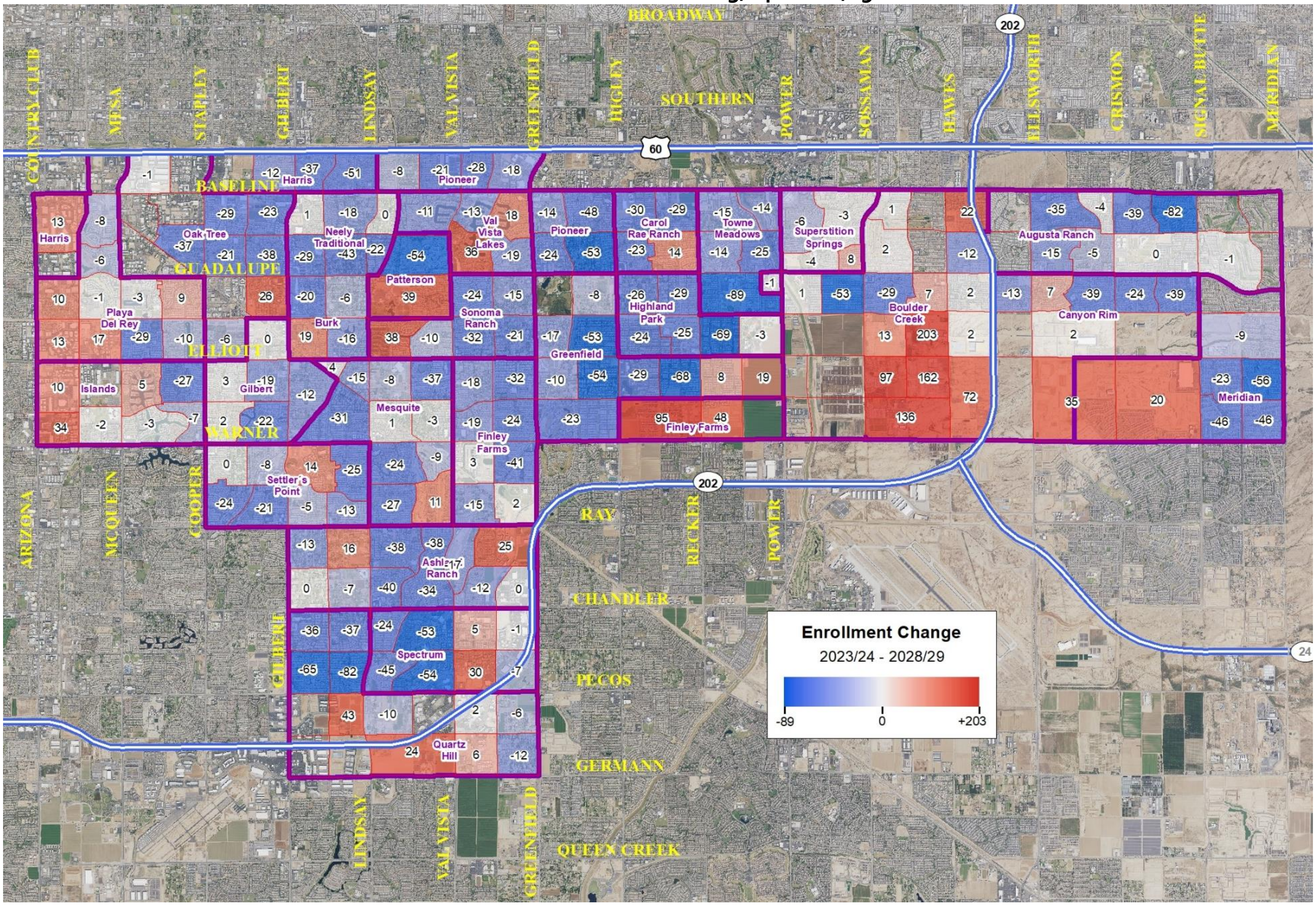
The projected changes in the number of students by grid over the next two five-year periods are depicted on **Maps 9 and 10**. The planning grids are color coded according to the degree of change, with increasing saturations of red for positive change and blue for negative change.

During the first five years of the projection period, strong enrollment growth is concentrated between Warner Road and Elliott Road in the central and eastern portions of the District. Moderate growth can also be seen along Arizona Avenue in the west, and in a few pockets in the southern portion of the District where new development is occurring. Enrollment losses are widespread throughout the District during this period and can be attributed to a combination of factors, including competition from charter and private schools, higher housing prices that are unattainable for younger families, and the aging of the existing households. As new single family housing construction slows during the second five-year period, enrollment growth is less concentrated and there is modest growth projected in the western part of the District as neighborhoods regenerate, and continued growth due to construction in the eastern part of the District.

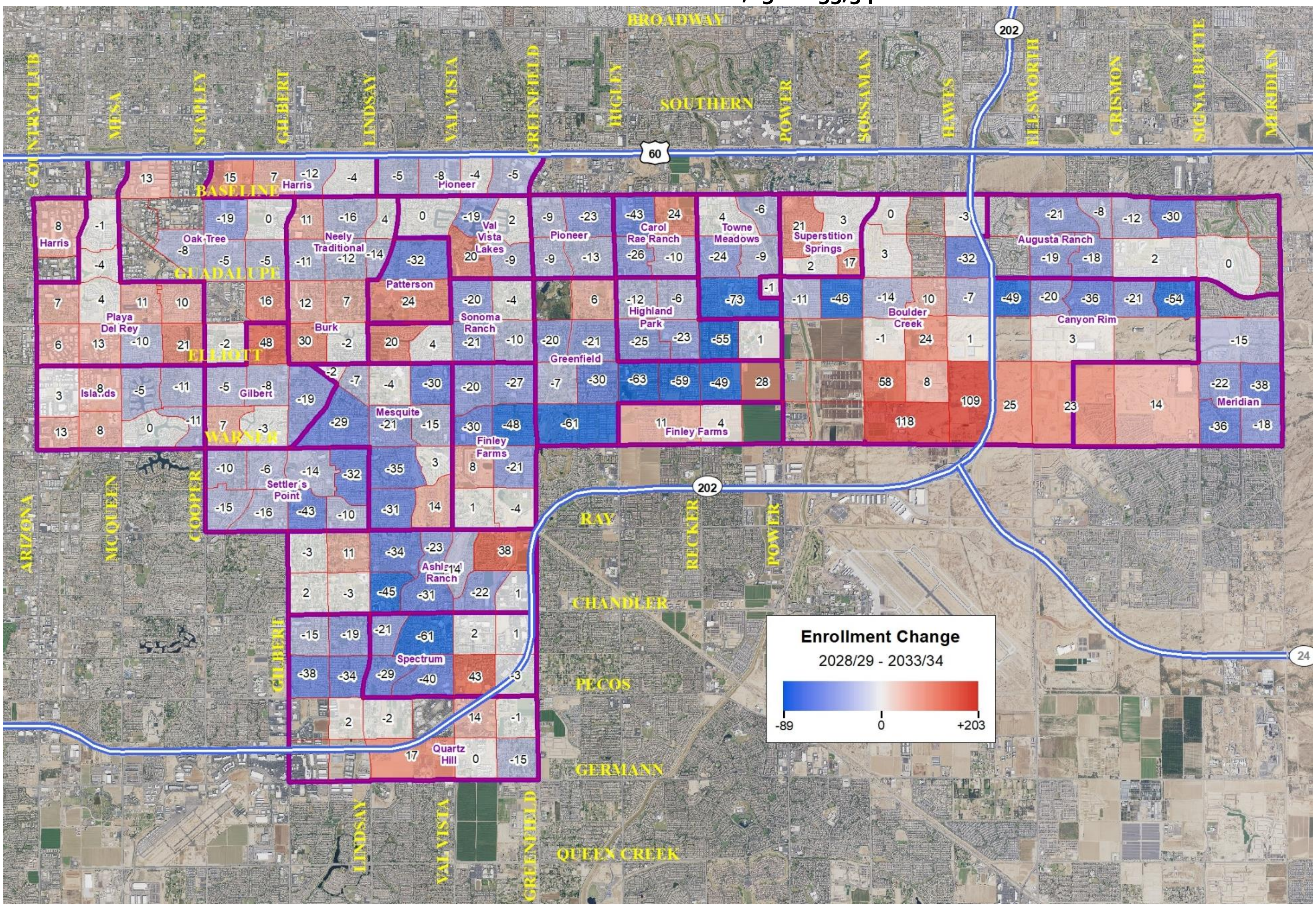
5.2 Attendance Area Projections

Table 22 shows historical elementary enrollment by attendance area, as well as projections through 2033/34 based on the Mid service rate scenario. The enrollment values are color coded relative to the share of total enrollment by year, with higher values in shades of red and lower values in shades of blue. In the annual total columns, the color saturation increases with the degree to which the value is higher or lower than the average for that year. In the change columns, the saturation increases with the value's distance from zero. The change in enrollment for select periods is highlighted in the leftmost columns of the table.

MAP 9
ENROLLMENT CHANGE: 2023/24 - 2028/29



MAP 10
ENROLLMENT CHANGE: 2028/29 - 2033/34



As previously discussed, in-District elementary enrollment has been declining, the effects of which have been offset somewhat by increases in out-of-District enrollment. During the first half of the projection period, out-of-District enrollment is projected to remain fairly flat, resulting in an overall decline in elementary enrollment of 1,730 students by the end of the first five-year period. During the second half of the projection period, continued losses in both in-District and out-of-District students result in a net loss of another 500 K-6 students between 2028/29 and 2033/34. As a result, total elementary enrollment in 2033/34 is expected to total roughly 13,100 K-6 students, versus 15,400 K-6 students in 2023/24.

During the first half of the projection period, 23 of the 26 elementary attendance areas are projected to experience some degree of enrollment decline, resulting in a loss of 1,600 in-District K-6 students over the five-year period. The only area with significant enrollment gains projected is the Boulder Creek (+200 students) attendance area. The largest losses are expected in the Greenfield and Canyon Rim attendance areas (-200 students each). In addition, out-of-District enrollment is expected to decline slightly (-100 students) by 2028/29. During the second half of the projection period, only the Boulder Creek attendance area is projected to experience a notable enrollment increase (+100 students) with very modest increases of 30 students each at Canyon Rim and Gilbert as those neighborhoods begin to regenerate. Small enrollment declines or flat enrollment is expected in all of the remaining elementary attendance areas, resulting in a net loss of 400 in-District K-6 students during the second five-year period. Out-of-District enrollment is also projected to decrease during the second half of the projection period, declining by about 100 students.

Ten-year enrollment projections for the junior and high school attendance areas are shown on **Table 23**. In-District 7-8 attendance area enrollment is expected to increase during the first five-year period (+300 students) and decline during the second five-year period (-700 students), resulting in the net loss of 400 in-District students 7-8 over the next ten years. This in-District enrollment decline is slightly offset by a projected net gain of 40 out-of-District students over the ten-year period. Enrollment declines over the 10-year period are expected in the Greenfield (-160 students), Highland (-140 students) and South Valley (-140 students) by 2033/34. Desert Ridge is the only 7-8 attendance area projected to experience an enrollment increase of any significance over the next 10 years (+60 students).

Modest enrollment declines are projected at the high school level due to the loss of nearly 900 in-District 9-12 students over the next 10 years. Only the Desert Ridge attendance area is projected to experience an enrollment increase (+200 students) by 2033/34; losses in the remaining attendance areas range from 100 students at Mesquite to losses of 300 to 350 students each at Highland and Gilbert. These losses are partially offset by a projected 700-student increase in out-of-District enrollment, particularly during the second half of the projection period.

TABLE 22
ELEMENTARY ENROLLMENT PROJECTIONS BY ATTENDANCE AREA
MID SERVICE RATE PROJECTIONS

	Actual						Projected - Mid Scenario						2018-	2023-	2028-
	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	...2033/34	2023	2028	2033
Ashland Ranch	647	672	645	631	666	593	569	544	512	498	456	421	-54	-137	-35
Augusta Ranch	821	830	817	806	792	775	756	728	693	681	635	617	-46	-140	-18
Boulder Creek	732	724	699	727	698	745	769	831	894	936	983	1,084	13	238	101
Burk	312	313	278	601	559	541	538	538	533	519	499	494	229	-42	-5
Canyon Rim	705	670	618	689	688	683	600	572	542	511	495	527	-22	-188	32
Carol Rae Ranch	440	426	383	396	399	379	359	343	322	310	285	295	-61	-94	10
Finley Farms	624	598	585	670	721	705	709	683	659	639	618	542	81	-87	-75
Gilbert	410	422	394	401	360	356	348	346	322	317	305	334	-54	-51	28
Greenfield	948	1,001	917	920	879	854	811	759	703	662	621	570	-94	-233	-51
Harris	467	459	386	387	356	363	366	367	366	372	362	359	-104	-1	-3
Highland Park	674	635	526	538	504	459	436	417	403	378	358	338	-215	-101	-20
Houston	328	323	301	0	0	0	0	0	0	0	0	0	-328	0	0
Islands	436	446	382	354	355	323	332	333	332	324	320	313	-113	-3	-7
Meridian	655	615	552	563	568	553	599	592	577	556	517	394	-102	-36	-124
Mesquite	711	745	702	690	681	683	657	636	595	577	540	486	-28	-143	-54
Oak Tree	595	568	543	554	545	498	483	480	463	456	451	448	-97	-47	-3
Patterson	346	342	322	334	334	317	301	294	296	291	292	292	-29	-25	-1
Pioneer	494	493	423	385	376	321	300	294	279	274	257	246	-173	-64	-11
Playa Del Rey	422	411	370	410	408	412	425	440	440	446	428	426	-10	16	-2
Quartz Hill	347	317	281	277	296	274	261	249	226	214	208	197	-73	-66	-11
Settler´s Point	640	618	551	579	565	565	547	533	498	475	452	374	-75	-113	-79
Sonoma Ranch	441	434	407	444	402	398	387	376	366	363	330	317	-43	-68	-13
Spectrum	595	598	521	532	547	510	488	477	444	433	410	370	-85	-100	-40
Superstition Springs	501	522	487	528	503	487	479	486	493	493	473	466	-14	-14	-7
Towne Meadows	555	543	494	526	509	479	460	437	407	401	377	374	-76	-102	-3
Val Vista Lakes	389	395	376	382	386	380	373	368	367	357	349	350	-9	-31	1
Out of District	2,233	2,410	2,547	2,577	2,721	2,699	2,763	2,752	2,704	2,652	2,599	2,492	466	-100	-107
Total	16,468	16,530	15,507	15,901	15,818	15,352	15,119	14,876	14,434	14,135	13,621	13,124	-1,116	-1,731	-497

Source: Applied Economics, 2024.

TABLE 23
SECONDARY ENROLLMENT PROJECTIONS BY ATTENDANCE AREA
MID SERVICE RATE PROJECTIONS

	Actual						Projected - Mid Scenario								
	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	...2033/34	2018-2023	2023-2028	2028-2033
JUNIOR HIGH															
Desert Ridge	1,036	968	907	908	847	839	854	897	954	990	1,005	902	-197	166	-103
Greenfield	941	1,013	936	984	1,014	953	971	1,026	1,037	1,005	993	794	12	40	-199
Highland	950	1,006	959	846	808	779	809	830	792	764	794	640	-171	15	-154
Mesquite	1,316	1,263	1,199	1,137	1,030	1,022	1,034	1,051	1,104	1,140	1,135	1,041	-294	113	-94
South Valley	732	735	677	665	628	599	618	602	584	577	560	456	-133	-39	-104
Out of District	698	746	801	801	797	812	785	801	879	892	935	851	114	123	-84
Total	5,673	5,731	5,479	5,341	5,124	5,004	5,073	5,207	5,350	5,368	5,422	4,683	-669	418	-739
HIGH SCHOOL															
Campo Verde High	1,531	1,546	1,490	1,488	1,455	1,394	1,382	1,317	1,291	1,246	1,249	1,101	-137	-145	-148
Desert Ridge High	2,244	2,144	2,078	2,042	1,917	1,853	1,846	1,839	1,885	1,924	2,016	2,038	-391	163	22
Gilbert High	2,230	2,175	2,107	2,140	2,091	2,045	1,933	1,850	1,833	1,772	1,822	1,740	-185	-223	-82
Highland High	2,601	2,655	2,677	2,648	2,652	2,578	2,540	2,453	2,446	2,487	2,486	2,227	-23	-92	-259
Mesquite High	1,767	1,669	1,619	1,610	1,616	1,541	1,452	1,367	1,295	1,287	1,359	1,447	-226	-182	88
Out of District	1,838	2,094	2,192	2,262	2,344	2,283	2,296	2,340	2,362	2,449	2,510	2,951	445	227	441
Total	12,211	12,283	12,163	12,190	12,075	11,694	11,450	11,167	11,110	11,166	11,442	11,504	-517	-252	62

Source: Applied Economics, 2024.

5.3 Attendance Area Versus School Enrollment

The variations between enrollment by attendance area and enrollment by school are detailed in **Tables 24 and 25**. These matrix tables show the movement of students between schools, both within and outside the District. Reading the table across shows the number of students attending a school from each attendance area (listed numerically across the top row as defined in the first column) and from outside the District. Reading down the columns details where students living in each attendance area choose to go to school. The number of students attending the school in their designated attendance area is shaded in green. For example, at the elementary level (**Table 24**) there are 498 students attending Ashland Ranch who reside in the Ashland Ranch attendance area, 1 is from the Canyon Rim attendance area, 7 from the Finley Farms attendance area, 9 from the Gilbert attendance area, and so on.

The number of students attending each school from outside the District is shown, along with the total number of students who attend the school and the total number of District students residing in the attendance area. The Net Difference column is calculated by subtracting the Total Reside from the Total Attendance. Note that the Total Attendance includes students who reside outside of the District, and the Total Reside only includes resident students enrolled in District schools. A school with a positive Net Difference is considered to be "importing" students, whereas a school with a negative Net Difference is considered to be "exporting" students.

Table 24 details the movement of District elementary students between schools, as well as the distribution of students from outside of the District, which contribute to the differences between enrollment by attendance area and enrollment by school. The matrix shows that of the 12,653 resident students attending District elementary schools this year, 70.2 percent attended the school designated by the attendance area in which they reside. Meridian retained the highest share of resident K-6 students (90 percent). Only four schools had the attend-reside ratios below 50 percent (Boulder Creek, Burk, Gilbert and Oak Tree). Of the schools with a designated attendance area, Highland Park is the largest net importer of students (284 students) and Boulder Creek is the largest exporter of K-6 students with a net loss of 276 students, despite the addition of 45 out-of-District students. This year, 166 elementary students residing in the Boulder Creek attendance area chose to attend Superstition Springs Elementary. Oak Tree Elementary also exported a substantial number of resident students (115 students) to other schools despite having 69 out-of-District K-6 students. In 2023/24, 106 students residing in the Oak Tree attendance area chose to attend Neely Traditional. Of the schools with defined attendance areas, Quartz Hill enrolled the largest number of out-of-District students (205 students).

The movement of District middle and high school students between area of residence and school of attendance is summarized in **Table 25**. At the junior high level, 80.2 percent of the 4,192 resident students attended their designated school. Of the schools with defined attendance areas, South Valley Junior High School was the highest net importer of students (219 students), and enrolled the largest share of resident students (88.1 percent). Of Mesquite Junior High's 1,022 resident students, only 62.4 percent choose to attend the school, although a portion of this loss was offset by the enrollment of 100 out-of-District students. Mesquite Junior High was also the only junior high that had a net export of students this year (246 students). Desert Ridge enrolled the largest number of out-of-District students among the junior high schools (223 students).

Of the District's 9,411 resident high school students, 78.9 percent attended the school associated with their attendance area. Campo Verde High School had the largest net enrollment of non-residents (540 students) among the high schools with defined attendance areas, due largely to the addition of 460 out-of-District students. Mesquite had a net export of 177 students this year, despite enrolling 307 out-of-District students. Desert Ridge High School had a net enrollment this year of 333 non-resident students, but that was due entirely to the addition of 577 out-of-District students that chose to attend the school.

In total, the District enrolled 5,794 K-12 students from outside of the District's boundaries this year, which represents 18.1 percent of the District's total 2023/24 enrollment. Across all of the grade levels, 74.9 percent of resident students chose to attend the school associated with their attendance area of residence in 2023/24, which is less than the 2019/20 (pre-pandemic) ratio of 78.8 percent.

TABLE 24
SCHOOL VERSUS ATTENDANCE AREA ENROLLMENT (K-6th GRADE): 2023/24

School		Attendance Area																												
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	Out of District	Total Attendance	Total Reside	Net Difference
Ashland Ranch	1	498		1	3	1		7	9	5	6		3		38	3	5			12	28		13		2		111	745	593	152
Augusta Ranch	2		639	26	4	37								9			4					1	1	4	1		177	903	775	128
Boulder Creek	3		7	368		27	1			1	2	1		5	2			1			2			6	1		45	469	745	-276
Burk	4	4	2		250	2	1	4	11	1	26	2	3	1	11	13	2	2	9	2	6	11	1	1		7	59	431	541	-110
Canyon Rim	5		79	45		498	2					2		19			1	1						7			157	811	683	128
Carol Rae Ranch	6	3	2	18	3	4	321	4		14	3	14	3		2	5		18	2				2	7	44		83	552	379	173
Finley Farms	7	4		1	1	1		470	4	14	2	5			17	1	1		1	1	8	8	5		2	2	60	608	705	-97
Gilbert	8	4		2	41	2		15	165	5	15	4	10		27	35	8	3	21	3	17	10	3		1	3	152	546	356	190
Greenfield	9	3		12	2	1	4	91	7	676	2	9		2	12	2	1	6		5		10	4	1	4	4	67	925	854	71
Harris	10			1	7	1			2		218	3	5		1	8	6	3	1					1		2	102	361	363	-2
Highland Park	11	1	3	35	1	7	7	35	1	73		381		5	2		1	20	1		2	4		12	28	4	120	743	459	284
Islands	12	1			3			2	23		10		240		4	10			7		16	1	5	1		2	137	462	323	139
Meridian	13		17	13		75				4				498				1									180	788	553	235
Mesquite	14	5	1	1	5	4	3	5	10	5	3	2	5		400	4				5	10	9	7	4	3	5	63	559	683	-124
Oak Tree	15	1	1		9	2			11		10		4		2	244	5	5	8		6	4				2	69	383	498	-115
Patterson	16	5		5	44	2	1	4	9	4	5	2		2	16	30	216	10	7	3	7	39	6	2	3	13	76	511	317	194
Pioneer	17	2	2	7	1		4	3		3	5			1	4	1	3	189	2			8	1	2	3	6	106	353	321	32
Playa Del Rey	18	3			5			1	14		11	1	17		1	15	1		277	3	14		3				66	432	412	20
Quartz Hill	19	16	2	4	1			1	2	3			1		9	1				207	3		32			1	205	488	274	214
Settler's Point	20	9	2		12		1	2	20		1		3		35	4		2	2	2	395	2	3		2		51	548	565	-17
Sonoma Ranch	21	1		5	11	2	4	10	4	1	3	2	4	1	21	6	24	4	2	1	5	269	2	3	1	9	60	455	398	57
Spectrum	22	11	2		1		1	2	1		2		1		15	3			1	14	9	2	400			5	62	532	510	22
Superstition Springs	23		5	166	3	4			1	2	2	7		2										406	21	1	128	748	487	261
Towne Meadows	24	6	8	25	5	12	16	6		20	2	9		5	3	4	4	7		1	3		3	18	356	2	142	657	479	178
Val Vista Lakes	25	1	1		11		2	10	3	5	2	1			5	3	24	29	1		5	11	3	4	1	297	67	486	380	106
Neely Traditional		15		8	115	1	10	32	58	16	32	13	24	2	55	106	9	19	68	14	28	9	15	8	5	15	153	830	0	830
Other		0	2	2	3	0	1	1	1	2	1	1	0	1	1	0	2	1	2	1	1	0	1	0	1	0	1	26	0	26
Total Reside		593	775	745	541	683	379	705	356	854	363	459	323	553	683	498	317	321	412	274	565	398	510	487	479	380	2,699	15,352	12,653	2,699
Reside/Atttend Same		84%	82%	49%	46%	73%	85%	67%	46%	79%	60%	83%	74%	90%	59%	49%	68%	59%	67%	76%	70%	68%	78%	83%	74%	78%			8,878	70.2%

Sources: Gilbert Public Schools, 2023; Applied Economics, 2024.

TABLE 25
SCHOOL VERSUS ATTENDANCE AREA ENROLLMENT (7^{th}-12^{th} GRADE): 2023/24

MIDDLE SCHOOL

School		Attendance Area 1	2	3	4	5	Out of District	Total Attendance	Total Reside	Net Difference
Desert Ridge Junior High School	1	717	3	7			223	950	839	111
Greenfield Junior High School	2	14	800	66	155	25	135	1,195	953	242
Highland Junior High School	3	82	51	677	11	10	127	958	779	179
Mesquite Junior High School	4	3	20	2	638	13	100	776	1,022	-246
South Valley Junior High School	5	1	27	7	86	528	169	818	599	219
Gilbert Classical Academy		11	36	8	87	18	42	202	0	202
Gilbert Global Academy		5	3	2	7		4	21	0	21
Gilbert High School		3	13	4	30	1	9	60	0	60
Canyon Valley Junior High		2		1	2	1	1	7	0	7
Other		1	0	5	6	3	2	17	0	17
Total Reside		839	953	779	1,022	599	812	5,004	4,192	812
Reside/Atttend Same (In-District)		85.5%	83.9%	86.9%	62.4%	88.1%		3,360	80.2%	

HIGH SCHOOL

School		Attendance Area 1	2	3	4	5	Out of District	Total Attendance	Total Reside	Net Difference
Campo Verde High School	1	1,184	5	61	27	193	460	1,930	1,394	536
Desert Ridge High School	2		1,568	7	33	1	577	2,186	1,853	333
Gilbert High School	3	72	19	1,509	129	203	305	2,237	2,045	192
Highland High School	4	25	152	228	2,206	28	414	3,053	2,578	475
Mesquite High School	5	22	5	60	8	962	307	1,364	1,541	-177
Gilbert Classical Academy		35	16	82	67	79	106	385	0	385
Gilbert Global Academy		22	20	29	41	12	54	178	0	178
Canyon Valley High School		22	59	57	57	56	52	303	0	303
Other		12	9	12	10	7	8	58	0	58
Total Reside		1,394	1,853	2,045	2,578	1,541	2,283	11,694	9,411	2,283
Reside/Atttend Same (In-District)		84.9%	84.6%	73.8%	85.6%	62.4%		7,429	78.9%	

In-District Students (K-12)	Reside/Atttend Same (In-District)	19,667	74.9%

Sources: Gilbert Public Schools, 2023; Applied Economics, 2024.

5.3 Enrollment by School

The observed trends in school enrollment versus attendance area enrollment for the past five years are used to create projections of enrollment by school and are shown in **Tables 26 and 27**. These projections by school reflect the same pattern of change as the attendance areas. While intra-District movement patterns tend to hold steady for several years, the potential for new alternative providers, special programs, and a host of other factors can cause these relationships to shift over time. Therefore, the projections by school for the long-term, 5 to 10 years into the future should be used with this in mind.

TABLE 26
ELEMENTARY ENROLLMENT BY SCHOOL

	Actual						Projected - Mid Scenario						2018-	2023-	2028-
	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	...2033/34	2023	2028	2033
ELEMENTARY															
Ashland Ranch	787	768	561	704	796	745	724	704	674	656	635	647	-42	-110	12
Augusta Ranch	948	947	750	911	916	903	880	858	809	792	728	674	-45	-175	-54
Boulder Creek	556	532	401	498	435	469	501	567	633	682	730	783	-87	261	52
Burk	355	349	238	517	465	431	426	413	403	377	365	376	76	-66	12
Canyon Rim	779	746	585	740	810	811	737	706	687	655	622	640	32	-189	18
Carol Rae Ranch	531	506	408	526	551	552	540	530	515	508	469	437	21	-83	-32
Finley Farms	662	642	489	594	626	608	604	579	553	544	523	457	-54	-85	-66
Gilbert	480	514	396	555	559	546	559	583	578	564	538	501	66	-8	-37
Greenfield	959	1,028	831	993	947	925	903	868	810	763	731	692	-34	-194	-40
Harris	428	444	313	384	365	361	344	328	309	308	303	324	-67	-58	21
Highland Park	856	840	702	788	800	743	742	726	725	691	662	617	-113	-81	-45
Houston	336	332	238	0	0	0	0	0	0	0	0	0	-336	0	0
Islands	538	571	437	526	514	462	465	475	472	466	465	461	-76	3	-4
Meridian	730	683	575	671	740	788	854	862	845	832	805	660	58	17	-145
Mesquite	578	590	463	570	591	559	542	518	478	457	423	380	-19	-136	-43
Neely Traditional	802	780	546	764	806	830	802	791	774	762	780	830	28	-50	50
Oak Tree	499	470	344	419	404	383	359	344	326	313	316	338	-116	-67	22
Patterson	565	591	455	563	544	511	490	479	474	474	455	467	-54	-56	11
Pioneer	534	541	370	422	404	353	346	320	310	297	279	279	-181	-74	0
Playa Del Rey	421	440	339	439	429	432	451	466	460	475	453	439	11	21	-14
Quartz Hill	639	575	436	493	543	488	496	501	475	465	448	409	-151	-40	-39
Settler´s Point	625	609	468	570	555	548	518	504	464	450	414	376	-77	-134	-38
Sonoma Ranch	440	458	377	481	460	455	448	437	422	409	389	362	15	-66	-27
Spectrum	580	618	408	520	554	532	524	517	485	480	458	410	-48	-74	-47
Superstition Springs	700	740	595	730	766	748	740	709	701	682	641	574	48	-107	-67
Towne Meadows	622	668	587	695	652	657	630	602	561	548	521	501	35	-136	-20
Val Vista Lakes	497	518	429	504	479	486	468	464	467	460	444	450	-11	-42	6
Other	21	30	2,766	324	107	26	26	25	25	25	25	25	5	-1	0
Total	16,468	16,530	15,507	15,901	15,818	15,352	15,120	14,876	14,434	14,135	13,621	13,108	-1,116	-1,731	-513

Source: Applied Economics, 2024.

TABLE 27
SECONDARY ENROLLMENT BY SCHOOL

	Actual						Projected - Mid Scenario						2017-	2022-	2027-
	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	...2033/34	2022	2027	2032
JUNIOR HIGH*															
Desert Ridge	1,182	1,100	860	1,039	970	950	968	1,009	1,060	1,081	1,110	993	-232	160	-117
Greenfield	900	1,056	920	1,144	1,203	1,195	1,210	1,226	1,244	1,231	1,231	1,006	295	36	-226
Highland	1,269	1,279	1,004	1,040	978	958	958	990	1,016	1,014	1,024	874	-311	66	-151
Mesquite	969	924	691	895	812	776	786	825	869	893	908	814	-193	132	-94
South Valley	1,047	1,026	754	881	852	818	819	825	829	818	816	665	-229	-2	-152
Gilbert Classical	271	295	191	243	208	202	204	204	204	204	204	204	-69	2	0
Other	35	51	1,059	99	101	105	128	128	128	128	128	128	70	23	0
Total	5,673	5,731	5,479	5,341	5,124	5,004	5,073	5,207	5,350	5,368	5,422	4,683	-669	418	-739
HIGH SCHOOL*															
Campo Verde High	2,059	2,119	1,770	1,978	1,995	1,930	1,913	1,849	1,844	1,808	1,819	1,792	-129	-111	-27
Desert Ridge High	2,832	2,617	2,194	2,451	2,243	2,186	2,155	2,157	2,206	2,256	2,363	2,521	-646	177	158
Gilbert High	2,130	2,153	1,883	2,342	2,277	2,237	2,156	2,047	1,990	1,956	2,024	2,029	107	-213	5
Highland High	3,143	3,341	2,987	3,226	3,150	3,053	3,011	2,944	2,962	3,030	3,058	2,874	-90	5	-184
Mesquite High	1,546	1,505	1,184	1,448	1,395	1,364	1,274	1,226	1,165	1,172	1,235	1,344	-182	-129	109
Gilbert Classical	335	385	304	416	391	385	401	403	403	403	403	403	50	18	0
Other	166	163	1,841	329	624	539	540	540	540	540	540	540	373	1	0
Total	12,211	12,282	12,163	12,190	12,075	11,694	11,450	11,167	11,110	11,166	11,442	11,504	-517	-252	62

Source: Applied Economics, 2024.

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