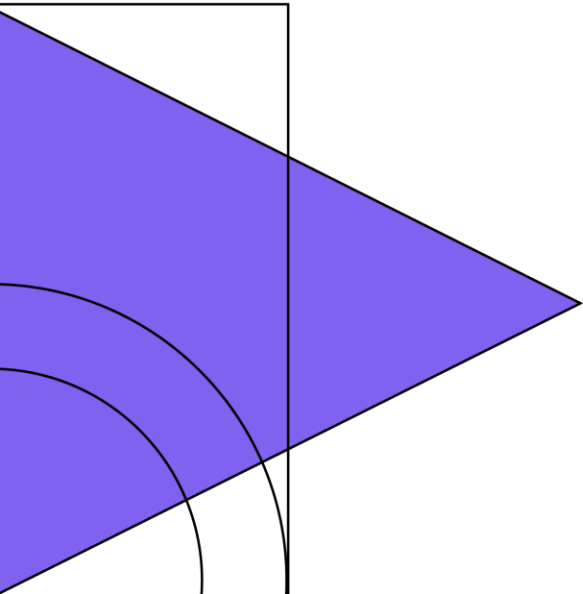
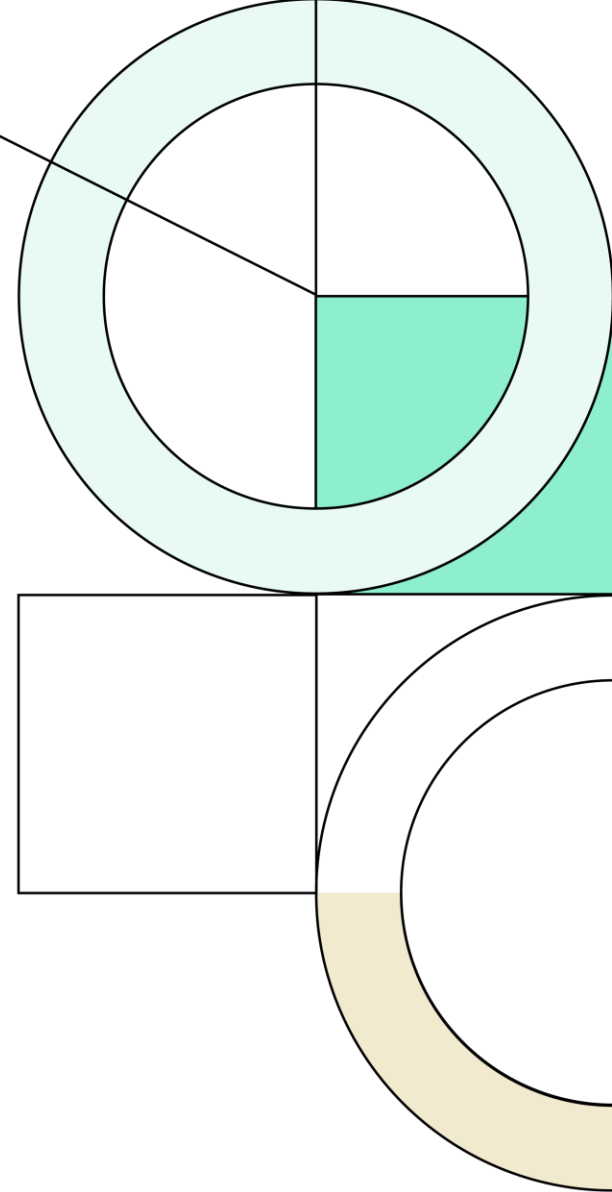




**Jarrell  
Independent  
School  
District**

1Q25

Demographic Report

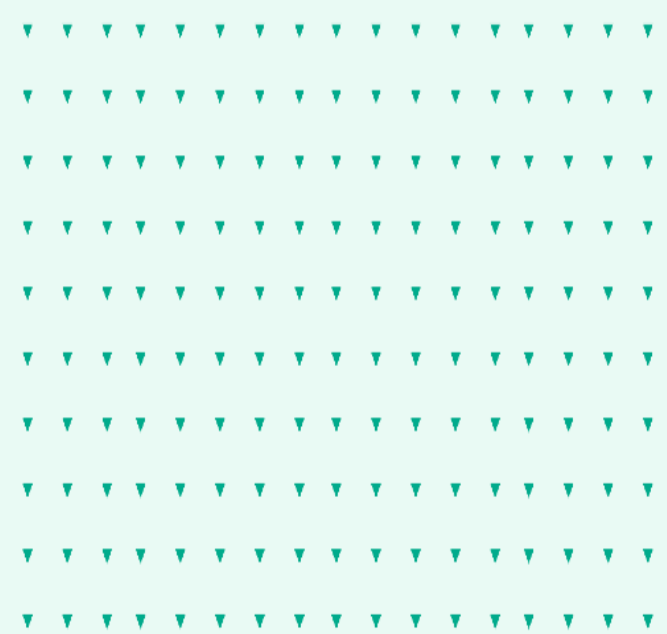
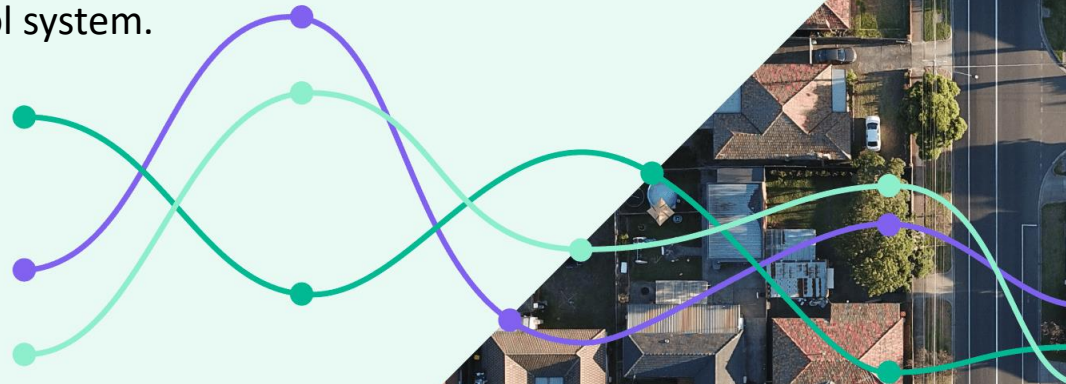


# Zonda™

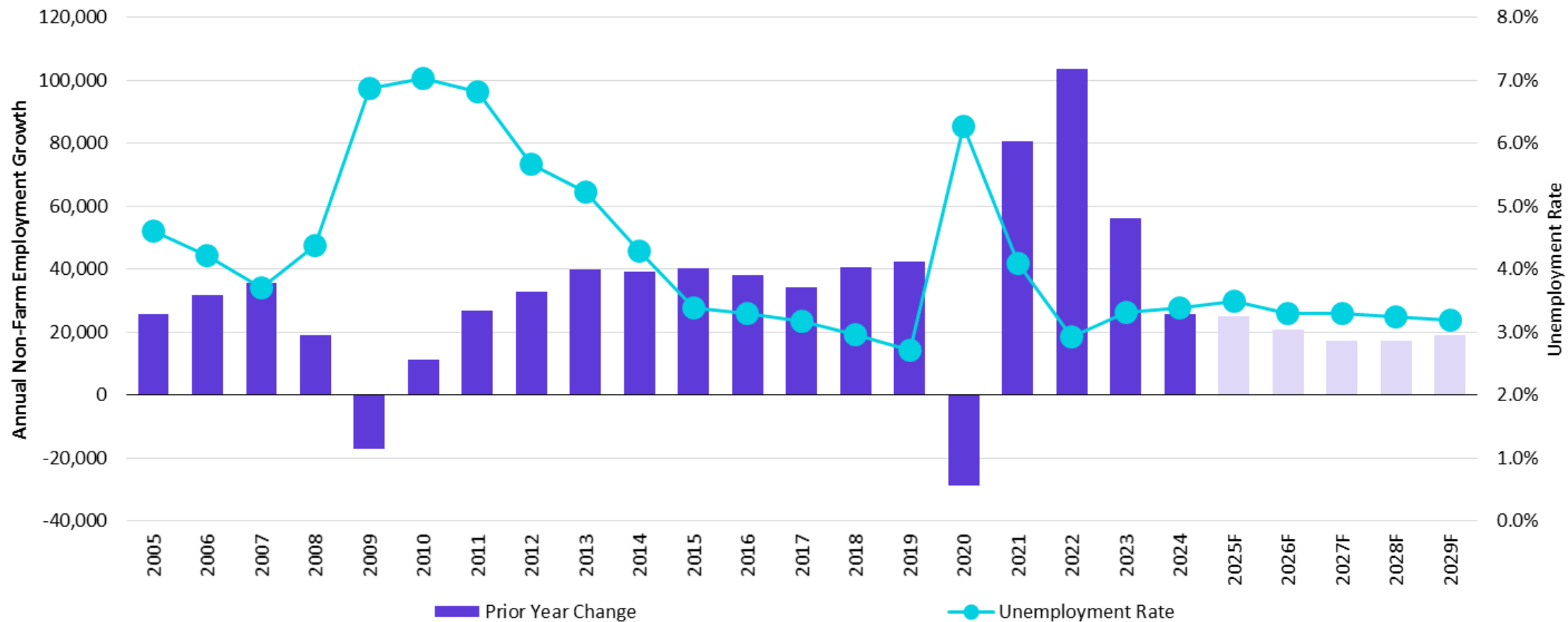
## Education

Zonda's demographic division, formerly Templeton Demographics, was established in 2006 and has been assisting public schools with demographic services for over 18 years. From day one, our mission has been to continually improve and provide accurate and timely data combined with outstanding consulting services. The fusion of demographics with unparalleled housing data from Zonda has made us a leader in the market. The data provides an in-depth look at how the impact of housing and development influences decisions made now and in the future across the nation. The 12 dedicated employees in our division work diligently to provide the best possible data and enrollment projections to help you make informed decisions for your school system.

We are the #1 demographer in the state of Texas and now work with clients in Arkansas, Colorado, Georgia, Missouri, Oklahoma, North Carolina and South Carolina.



# Austin MSA Employment Growth

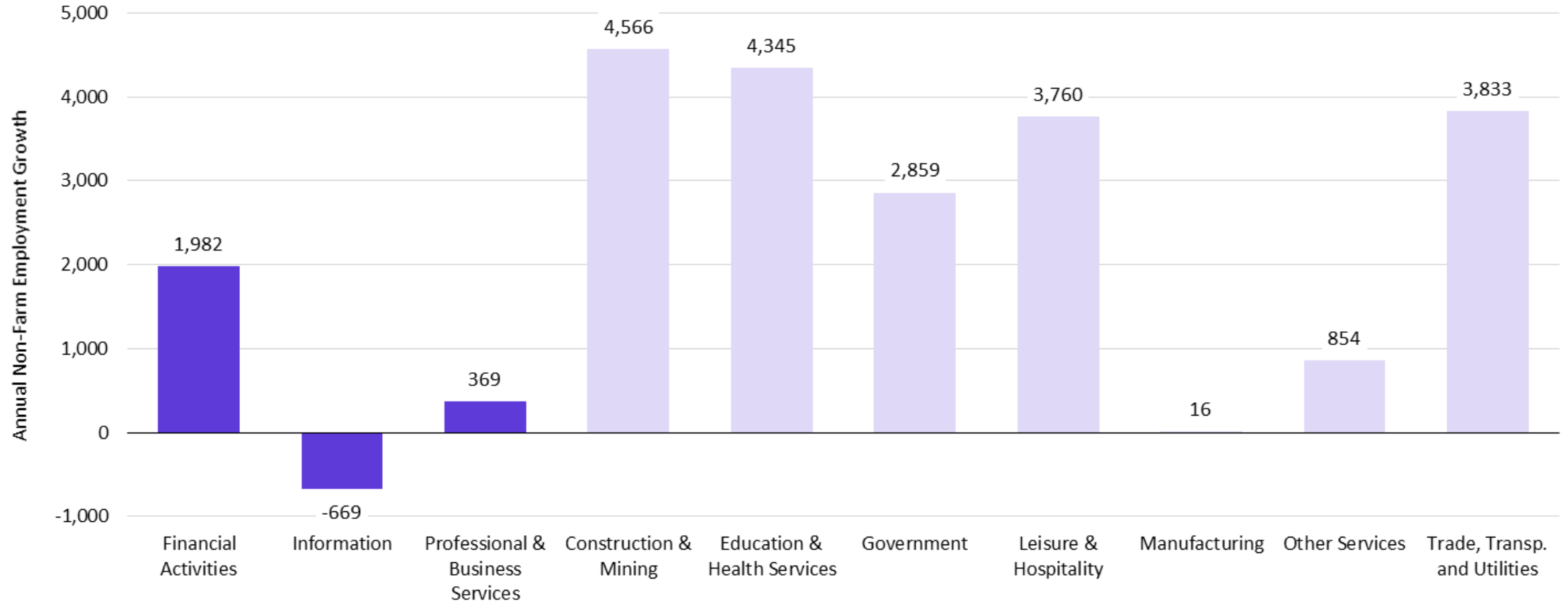


Source: Moody's Analytics; U.S. Bureau of Labor Statistics (BLS)

## Austin-Round Rock, TX Metropolitan Statistical Area - Moody's Analytics Five-Year Forecast

Category	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025F	2026F	2027F	2028F	2029F
Non-Farm Employment	964,608	1,002,608	1,037,025	1,077,833	1,120,300	1,091,450	1,172,125	1,275,833	1,332,000	1,357,942	1,382,963	1,403,802	1,421,038	1,438,198	1,457,173
Prior Year Change	40,350	38,000	34,417	40,808	42,467	(28,850)	80,675	103,708	56,167	25,942	25,021	20,840	17,236	17,160	18,974
Annual % Change	4.4%	3.9%	3.4%	3.9%	3.9%	-2.6%	7.4%	8.8%	4.4%	1.9%	1.8%	1.5%	1.2%	1.2%	1.3%
<b>Unemployment Rate</b>	<b>3.4%</b>	<b>3.3%</b>	<b>3.2%</b>	<b>3.0%</b>	<b>2.7%</b>	<b>6.3%</b>	<b>4.1%</b>	<b>2.9%</b>	<b>3.3%</b>	<b>3.4%</b>	<b>3.5%</b>	<b>3.3%</b>	<b>3.3%</b>	<b>3.2%</b>	<b>3.2%</b>

# Austin MSA Employment Growth by Industry



Source: Moody's Analytics; U.S. Bureau of Labor Statistics (BLS)

Category	Financial Activities	Information	Professional & Business Services	Construction & Mining	Education & Health Services	Government	Leisure & Hospitality	Manufacturing	Other Services	Trade, Transp. and Utilities
Current Month (Feb-2025)	85,920	50,491	285,272	87,271	163,828	200,524	154,069	73,611	54,390	214,363
Current Month (Feb-2024)	83,938	51,160	284,903	82,705	159,483	197,665	150,309	73,594	53,536	210,530
<b>12-Month Change</b>	<b>1,982</b> 2.4%	<b>-669</b> -1.3%	<b>369</b> 0.1%	<b>4,566</b> 5.5%	<b>4,345</b> 2.7%	<b>2,859</b> 1.4%	<b>3,760</b> 2.5%	<b>16</b> 0.0%	<b>854</b> 1.6%	<b>3,833</b> 1.8%

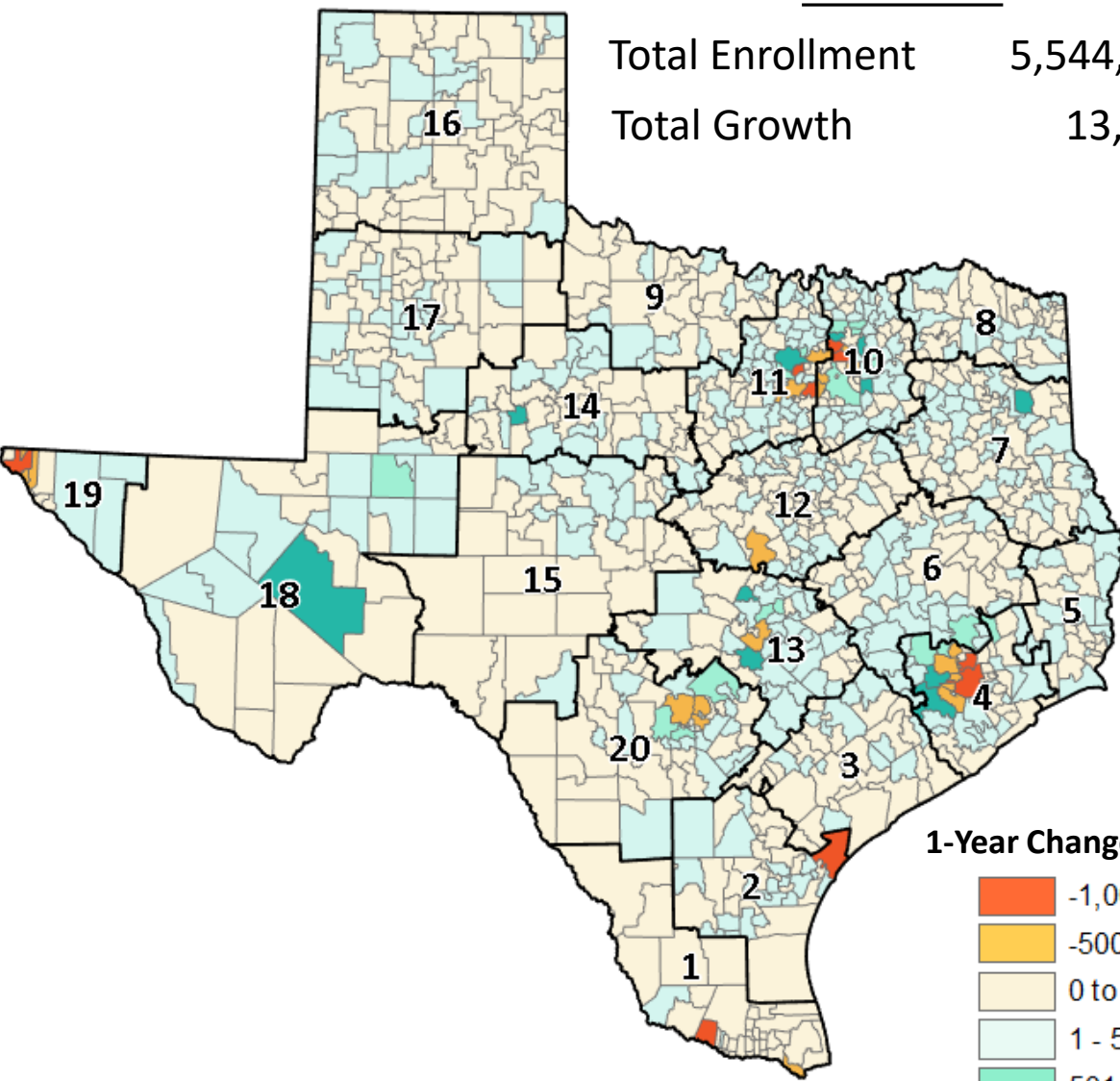
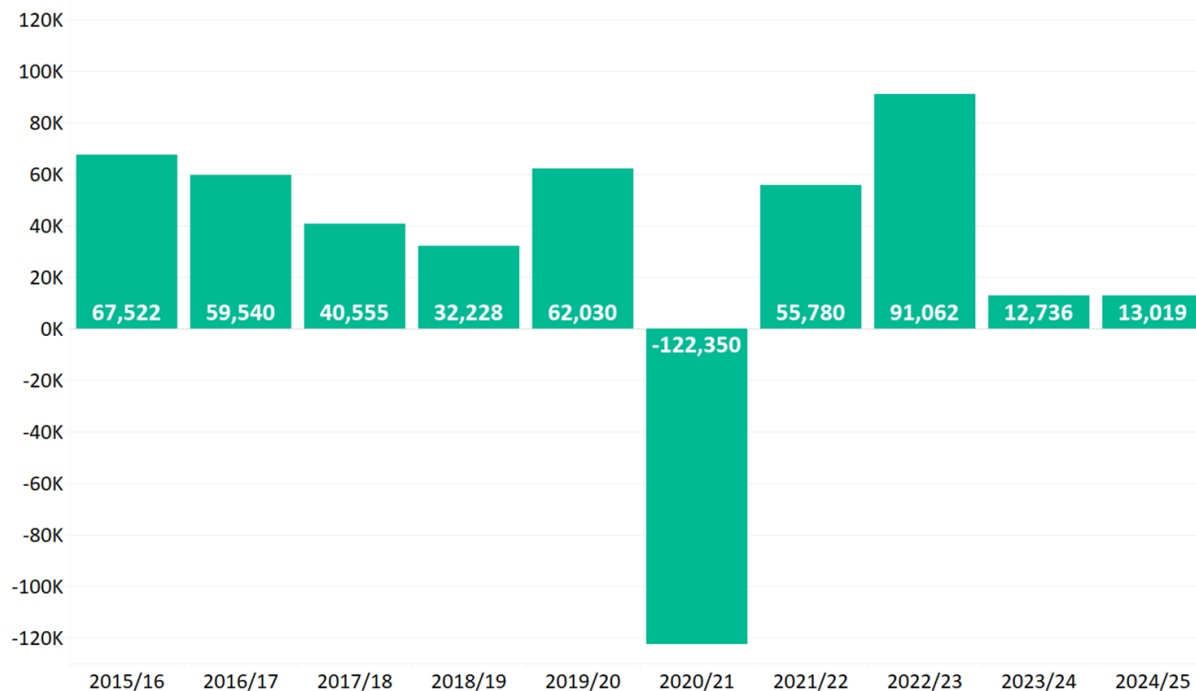
# State Enrollment Trends

## 2024-2025

Total Enrollment 5,544,255

Total Growth 13,019

## Texas ISD Enrollment Annual Change

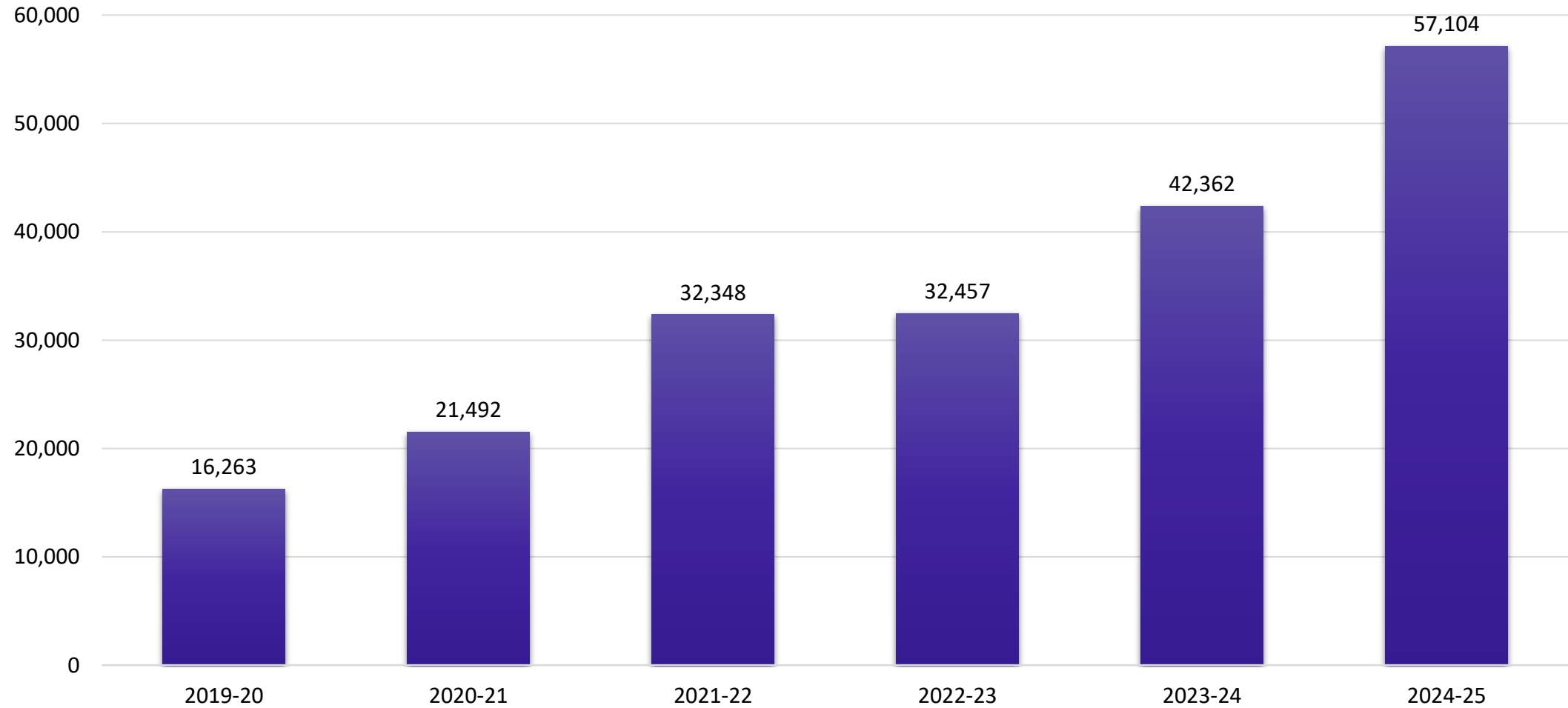


### 1-Year Change Enrollment

- -1,000 or more
- -500 to -1,000
- 0 to -500
- 1 - 500
- 501 - 1,000
- > 1,000

# Texas Virtual School Enrollment

## State of Texas - Virtual/Online School Enrollment





# Housing Activity by MSA

## Top 25 Housing Starts Markets (1Q2025)

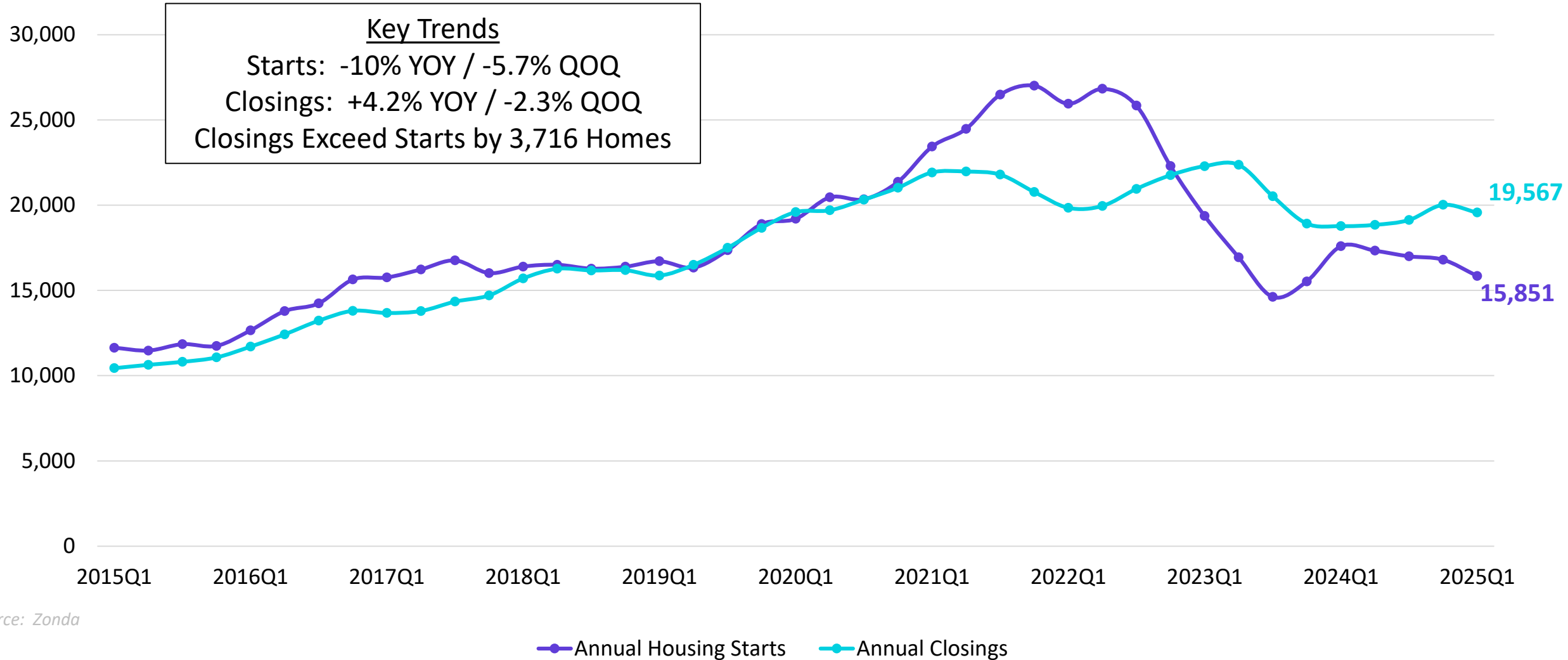
Rank	Market	1Q25 Annualized Starts	YOY Change	1Q19 Annualized Starts	Change from 2019
1	Dallas	47,107	4%	33,915	39%
2	Houston	38,822	2%	30,580	27%
3	Phoenix	23,014	19%	19,959	15%
4	San Antonio	18,624	14%	12,276	52%
5	Atlanta	18,455	-2%	23,239	-21%
6	Austin	15,851	-10%	16,583	-4%
7	Orlando	13,774	-12%	15,081	-9%
8	Charlotte	12,587	4%	11,667	8%
9	Tampa	12,005	-5%	11,492	4%
10	Las Vegas	11,925	10%	10,127	18%
11	Raleigh	11,879	6%	9,640	23%
12	Washington, DC	11,388	8%	12,814	-11%
13	Riverside/San Bernardino	10,719	-17%	9,728	10%
14	Miami	10,308	4%	8,176	26%
15	Nashville	9,527	5%	8,436	13%
16	Jacksonville	9,154	-17%	8,380	9%
17	Sarasota	9,051	-9%	6,113	48%
18	Denver	7,775	-3%	10,453	-26%
19	Minneapolis	7,580	8%	7,180	6%
20	Indianapolis	7,563	6%	6,078	24%
21	Sacramento	7,516	7%	5,556	35%
22	Boise	7,237	17%	5,800	25%
23	Lakeland	7,152	-13%	4,512	59%
24	Chicago	6,863	-2%	6,483	6%
25	Seattle	6,641	6%	8,614	-23%

Note: Data is through Q1 2025 and is annualized, covering the total of the previous four quarters for each period.

Source: Zonda

# Austin New Home Starts & Closings

Annual Housing Starts vs. Annual Closings



Source: Zonda

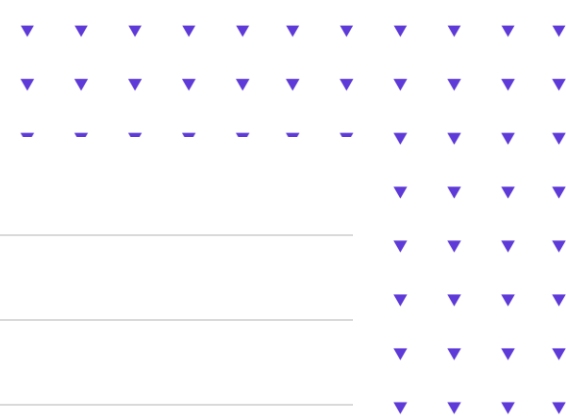
# Austin New Home Ranking Report

ISD Ranked by Annual Closings – 1Q25

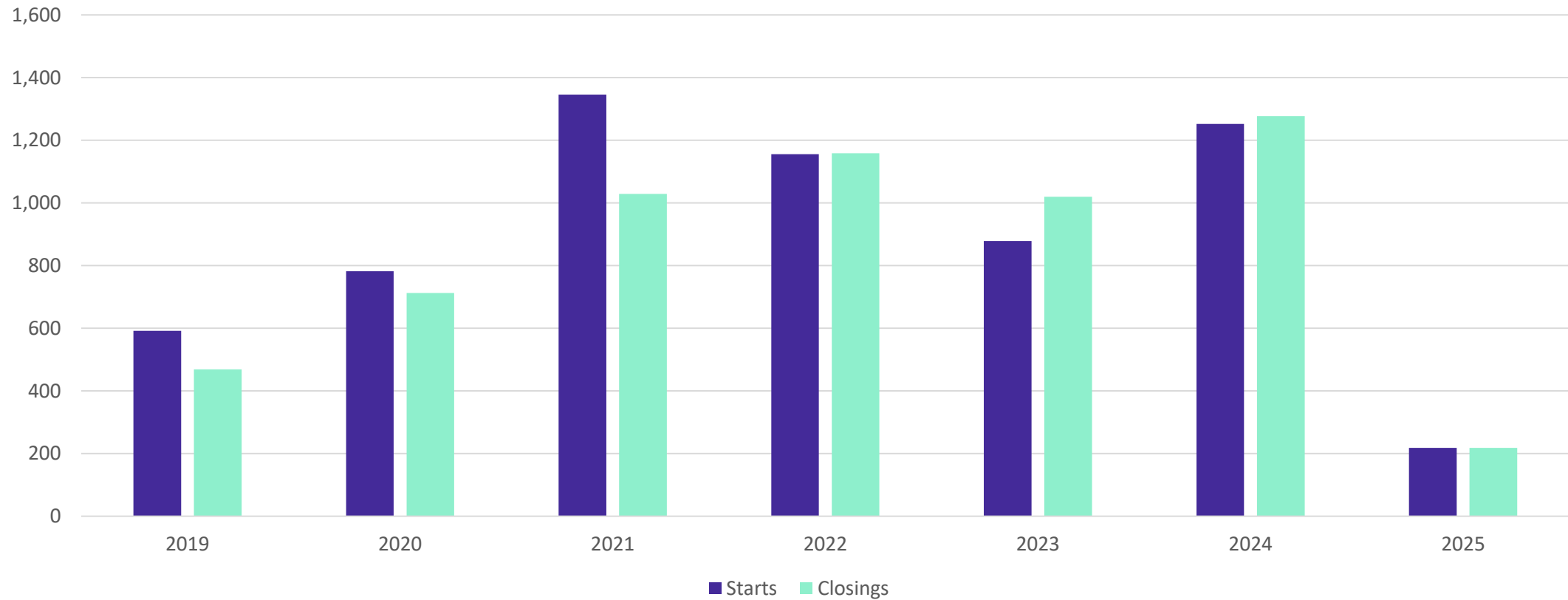
Rank	District	Annual Starts	Annual Closings	Inventory	VDL	Future
1	HAYS CISD	2,861	3,871	1,391	6,684	37,618
2	GEORGETOWN ISD	1,959	2,082	1,098	3,348	23,814
3	LIBERTY HILL ISD	1,584	1,858	834	2,950	7,757
4	LEANDER ISD	1,159	1,508	612	1,850	4,882
5	AUSTIN ISD	423	1,308	1,600	1,423	10,856
<b>6</b>	<b>JARRELL ISD</b>	<b>1,181</b>	<b>1,257</b>	<b>478</b>	<b>2,635</b>	<b>10,273</b>
7	MANOR ISD	687	970	352	1,477	14,578
8	DEL VALLE ISD	944	951	632	2,496	27,983
9	HUTTO ISD	986	947	612	1,422	16,158
10	PFLUGERVILLE ISD	746	795	363	1,383	10,088
11	ROUND ROCK ISD	613	767	317	995	2,322
12	BASTROP ISD	343	748	297	3,336	20,745
13	LOCKHART ISD	334	616	141	799	18,186
14	DRIPPING SPRINGS ISD	448	514	289	885	6,896
15	SAN MARCOS CISD	453	510	370	1,056	7,494
16	ELGIN ISD	473	478	264	1,260	13,310
17	LAKE TRAVIS ISD	348	432	226	934	3,671
18	TAYLOR ISD	160	89	98	489	2,932
19	FLORENCE ISD	141	80	112	599	2,029
20	LAGO VISTA ISD	103	75	103	748	4,961

\* Based on additional Zonda Demographics housing research

# District New Home Starts and Closings

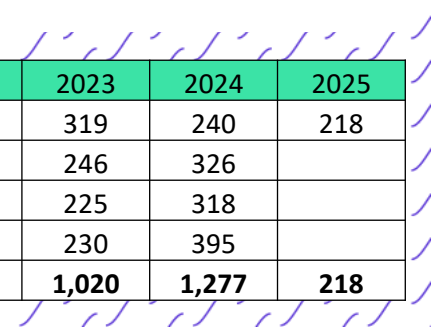


New Home Starts and Closings

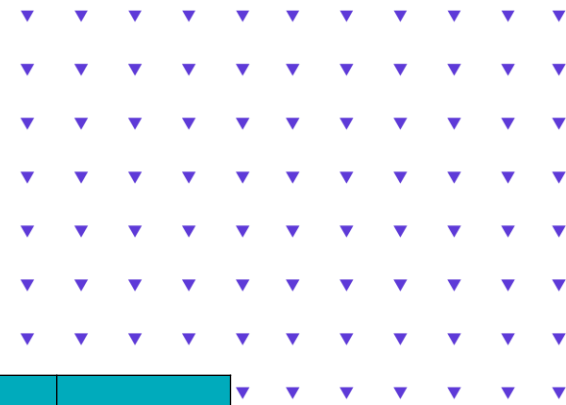


Starts	2019	2020	2021	2022	2023	2024	2025
1Q	55	155	313	327	102	292	218
2Q	129	135	339	413	239	392	
3Q	248	241	288	324	350	370	
4Q	160	251	406	92	188	201	
<b>Total</b>	<b>592</b>	<b>782</b>	<b>1,346</b>	<b>1,156</b>	<b>879</b>	<b>1,252</b>	<b>218</b>



Closings	2019	2020	2021	2022	2023	2024	2025
1Q	85	129	244	230	319	240	218
2Q	97	195	263	409	246	326	
3Q	107	166	342	267	225	318	
4Q	180	223	180	253	230	395	
<b>Total</b>	<b>469</b>	<b>713</b>	<b>1,029</b>	<b>1,159</b>	<b>1,020</b>	<b>1,277</b>	<b>218</b>

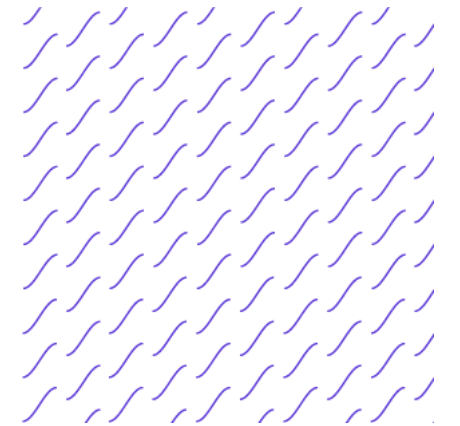


# District Housing Overview by Elementary Zone



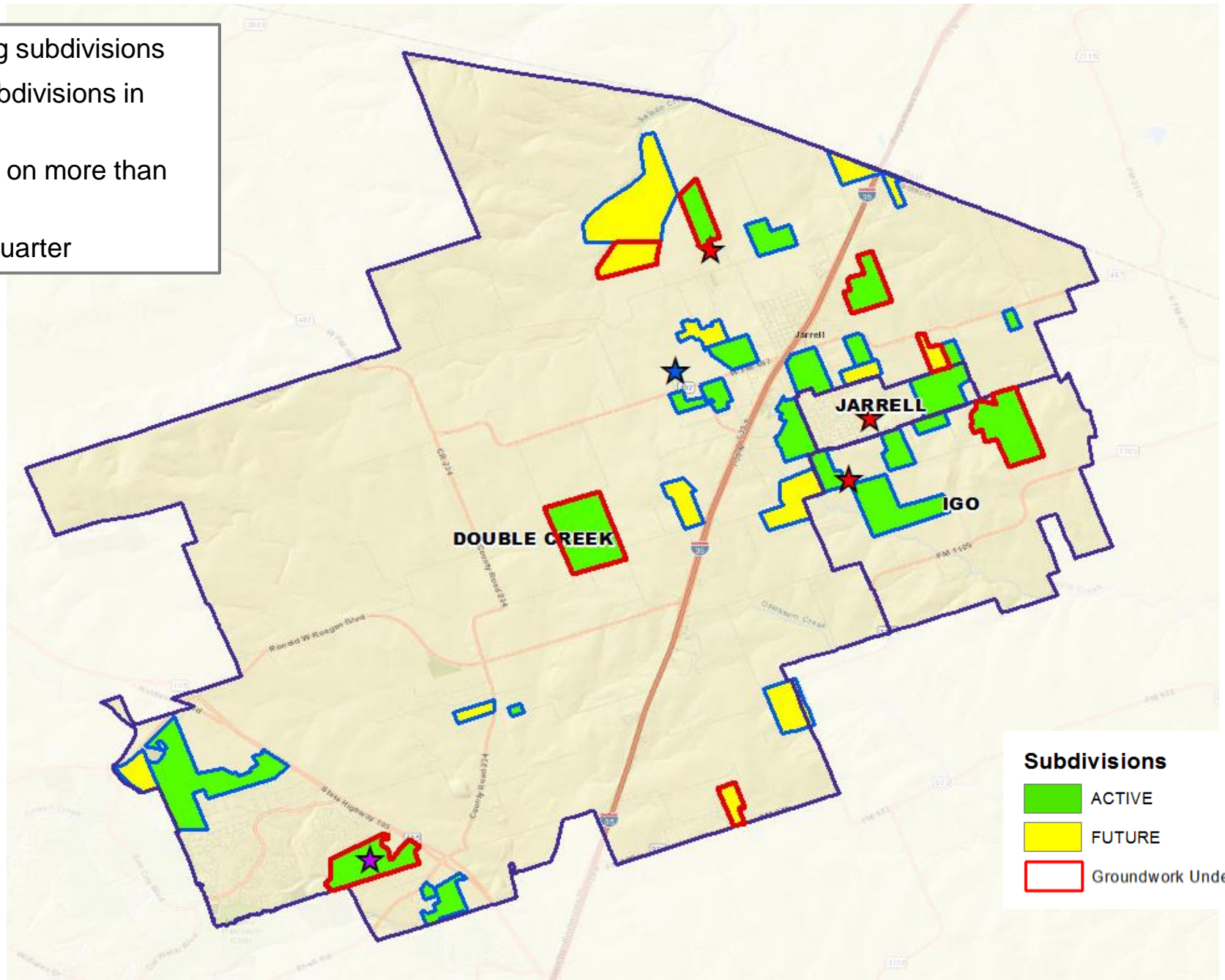
Elementary	Annual Starts	Quarterly Starts	Annual Closings	Quarterly Closings	Under Construction	Inventory	Vacant Dev. Lots	Future
DOUBLE CREEK	755	136	741	128	173	285	1,286	7,756
IGO	382	74	452	78	81	173	938	2,517
JARRELL	44	8	64	12	8	20	411	0
<b>Grand Totals</b>	<b>1,181</b>	<b>218</b>	<b>1,257</b>	<b>218</b>	<b>262</b>	<b>478</b>	<b>2,635</b>	<b>10,273</b>

 Highest activity in the category  
 Second highest activity in the category



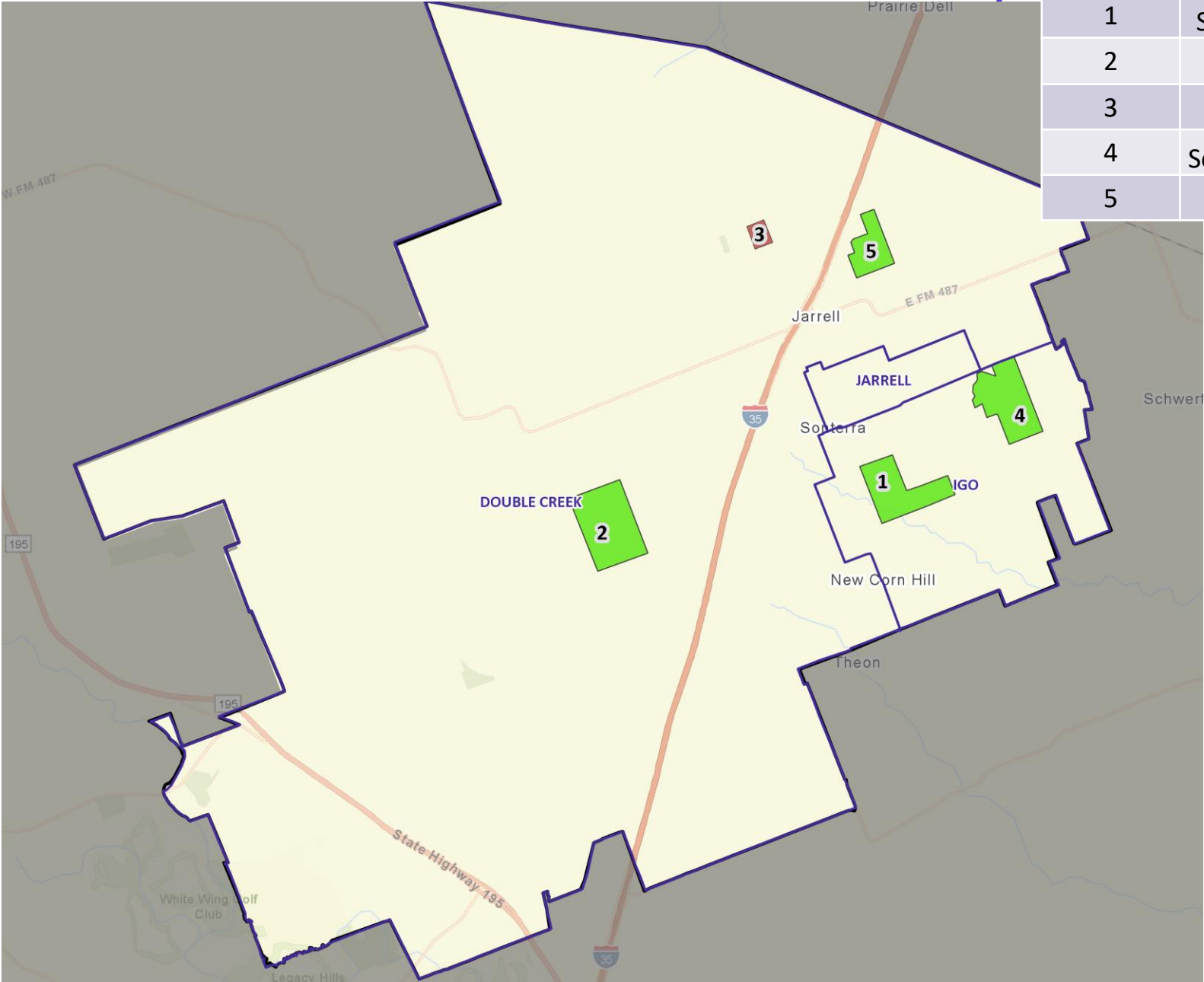
# District Housing Overview

- The district has 20 actively building subdivisions
- Within JISD there are 12 future subdivisions in various stages of planning
- Of these, groundwork is underway on more than 1,850 lots within 8 subdivisions
- 147 lots were delivered in the 1<sup>st</sup> quarter



# Top 5 Performing Subdivisions

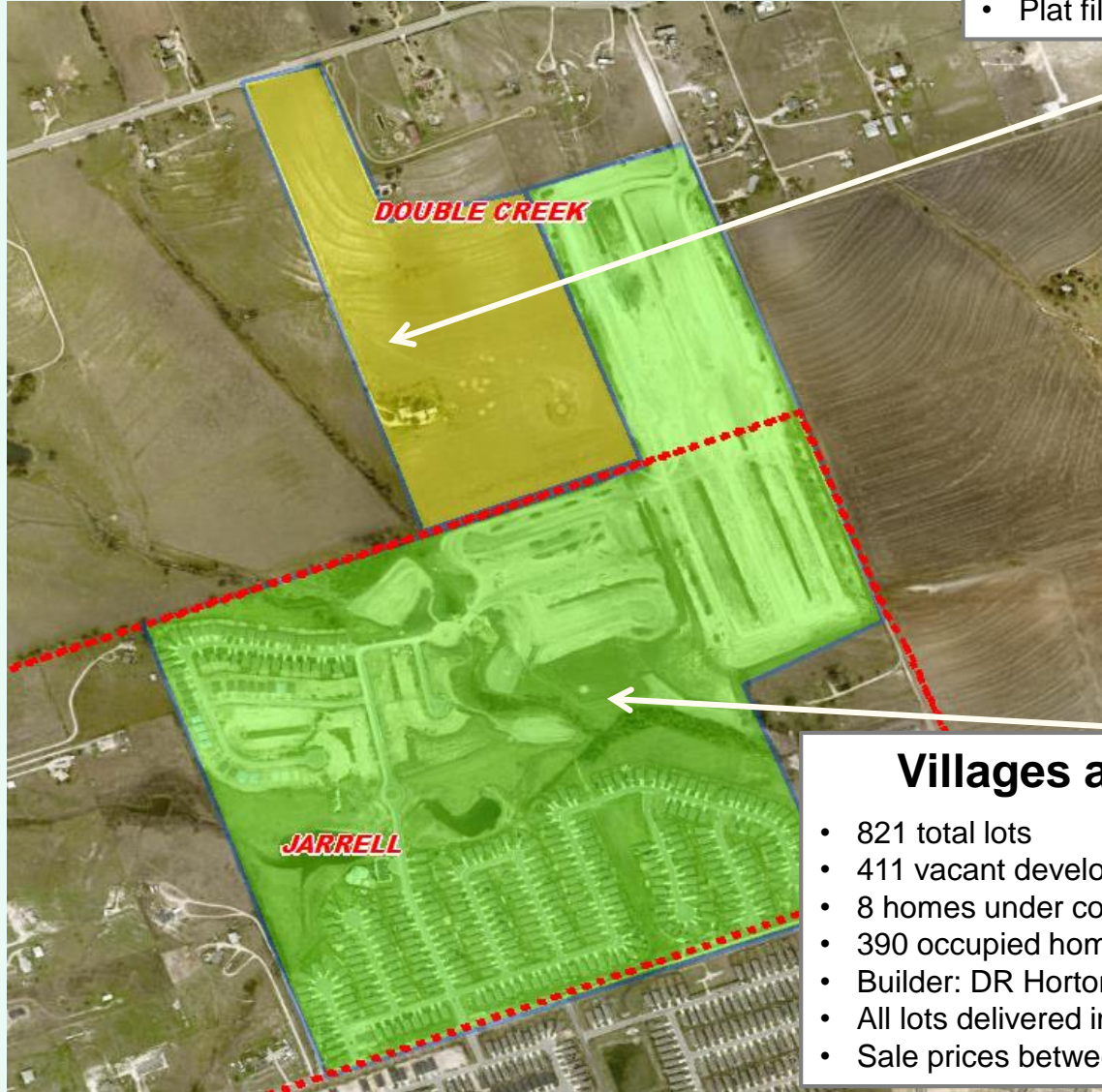
Map No.	Subdivision	Annual Closings
1	Sonterra/Eastwood	277
2	Rancho Del Cielo	268
3	Cielo Gardens	169
4	Sonterra/Cool Water	153
5	Eastern Wells	135



# Residential Activity

## Donahoe Brook

- 208 total future lots
- Groundwork underway
- Plat filed in January



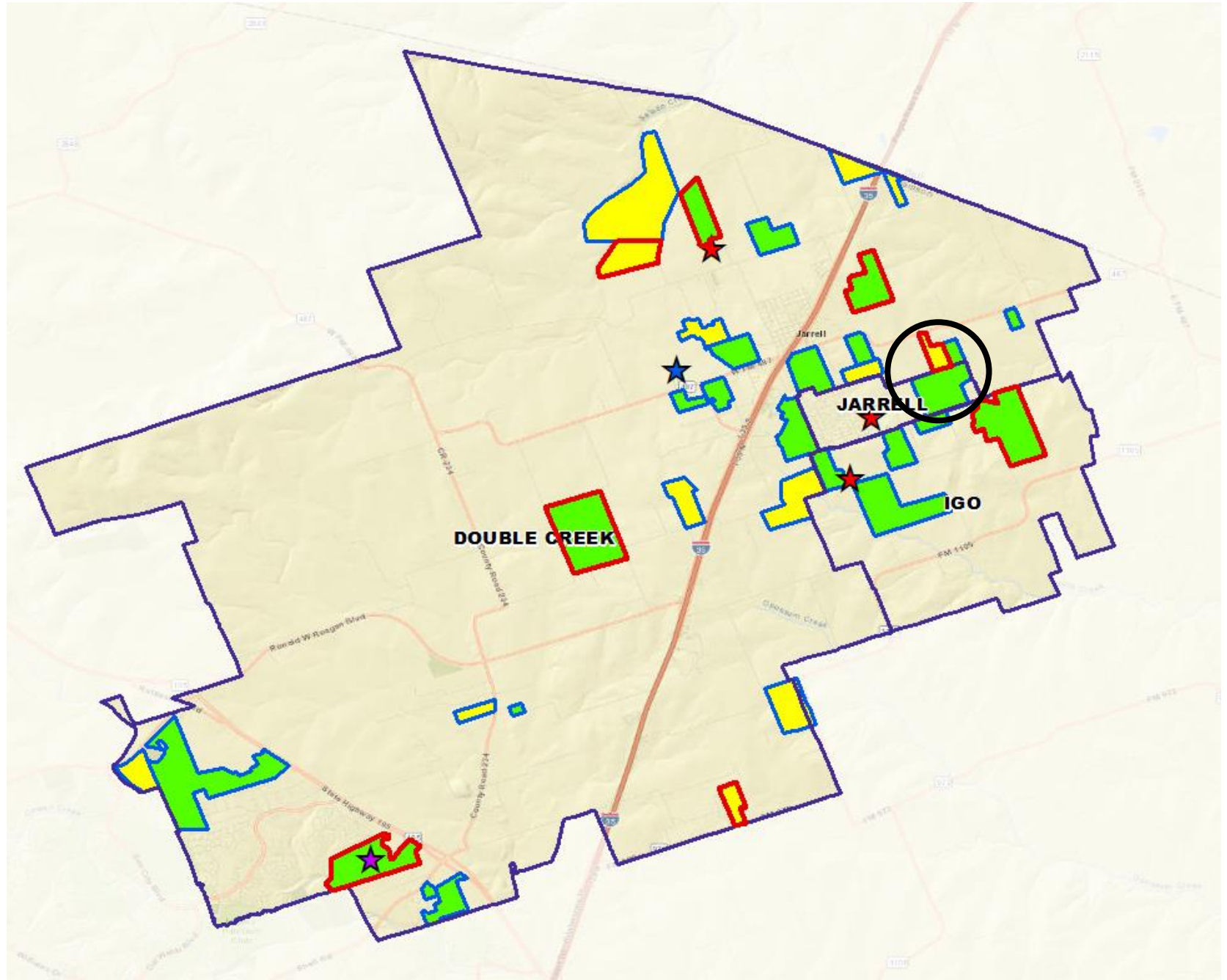
## Villages at Schwertner Ranch

- 821 total lots
- 411 vacant developed lots (147 in Double Creek)
- 8 homes under construction
- 390 occupied homes
- Builder: DR Horton
- All lots delivered in last quarter
- Sale prices between \$275,000 and \$330,000

*April 2025*



# District Housing Overview

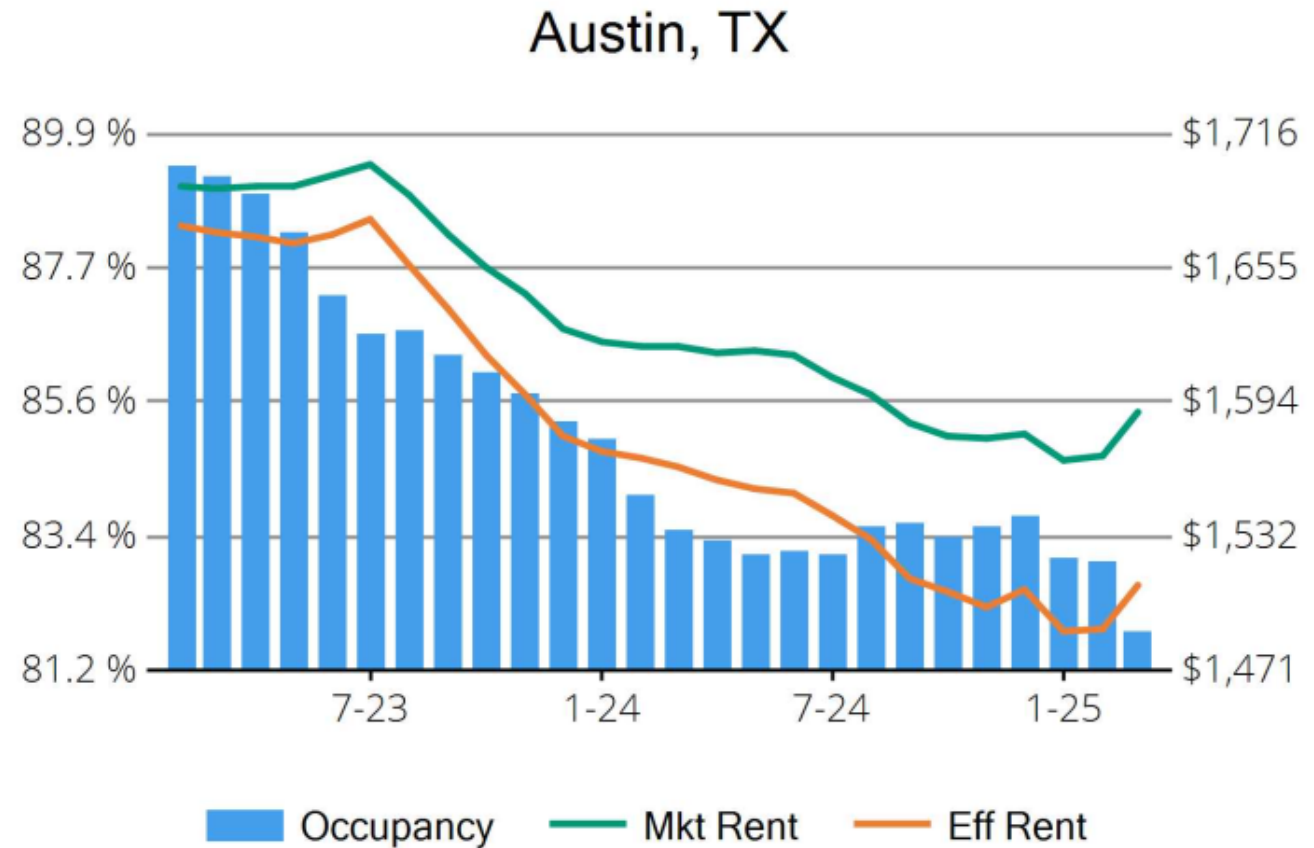


# Housing Market Trends: Multifamily Market- March 2025



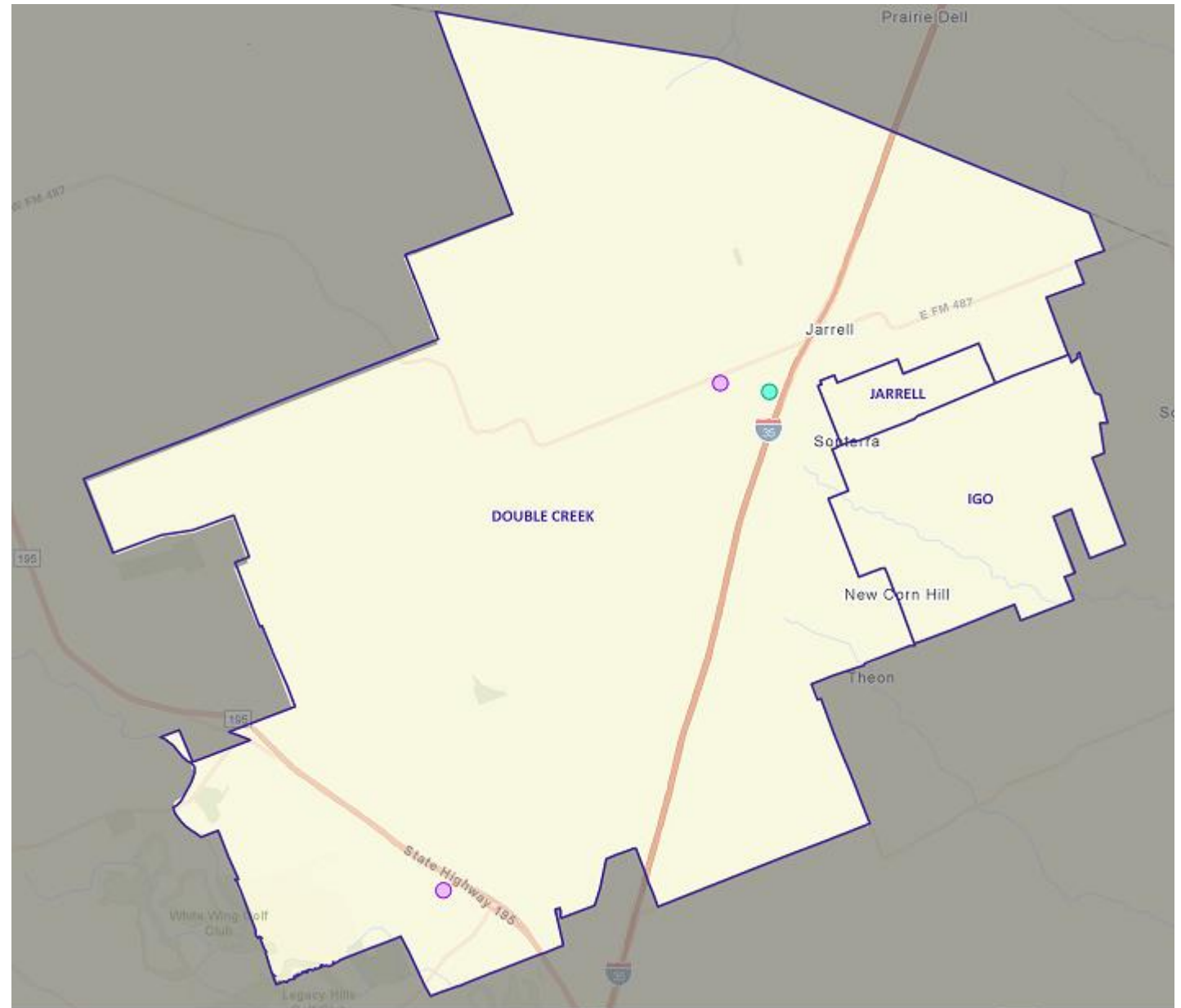
## Stabilized and Lease-up Properties

Conventional Properties	Mar 2025	Annual Change
Occupancy	81.9	-2.7%
Unit Change	21,208	
Units Absorbed (Annual)	11,383	
Average Size (SF)	878	+0.6%
Asking Rent	\$1,589	-1.7%
Asking Rent per SF	\$1.81	-2.3%
Effective Rent	\$1,510	-3.3%
Effective Rent per SF	\$1.72	-3.8%
% Offering Concessions	50%	+27.7%
Avg. Concession Package	9.4%	+21.8%



# District Multifamily Overview

- There are 524 multifamily units under construction across the district, of which 224 are single-family rentals
- There are roughly 80 future multifamily units in planning across the district, all of which are for senior-living



**Multi-Family Developments**

- FUTURE
- UNDER CONSTRUCTION

# Ten Year Forecast by Grade Level

Year (Oct.)	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	% Growth
2020/21	4	87	182	198	181	171	170	184	167	170	176	183	177	137	118	2,305		
2021/22	6	151	224	241	244	222	219	209	208	209	193	221	192	205	141	2,885	580	25.2%
2022/23	18	173	263	271	267	264	255	248	263	240	238	229	236	202	197	3,364	479	16.6%
2023/24	25	159	301	282	297	280	292	279	287	271	281	276	235	244	204	3,713	349	10.4%
2024/25	37	189	301	330	328	319	320	315	313	306	282	317	294	269	223	4,143	430	11.6%
2025/26	37	219	340	349	375	370	361	363	359	341	329	320	334	315	259	4,671	528	12.7%
2026/27	37	236	374	383	387	413	406	398	413	374	366	375	335	340	303	5,140	469	10.0%
2027/28	37	254	405	413	417	421	448	441	449	437	396	415	396	341	322	5,592	452	8.8%
2028/29	37	270	432	435	441	446	450	477	498	477	469	450	437	395	327	6,041	449	8.0%
2029/30	37	277	458	462	461	467	471	475	540	528	514	533	450	414	378	6,465	424	7.0%
2030/31	37	310	485	488	490	488	495	498	534	570	563	584	533	422	395	6,892	427	6.6%
2031/32	37	324	514	517	517	517	515	521	559	567	611	639	584	512	404	7,338	446	6.5%
2032/33	37	345	536	540	543	542	542	540	587	595	610	694	639	554	489	7,793	455	6.2%
2033/34	37	351	546	563	572	560	559	559	610	625	640	693	694	607	529	8,145	352	4.5%
2034/35	37	355	562	573	591	600	578	577	632	648	671	727	693	662	580	8,486	341	4.2%

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

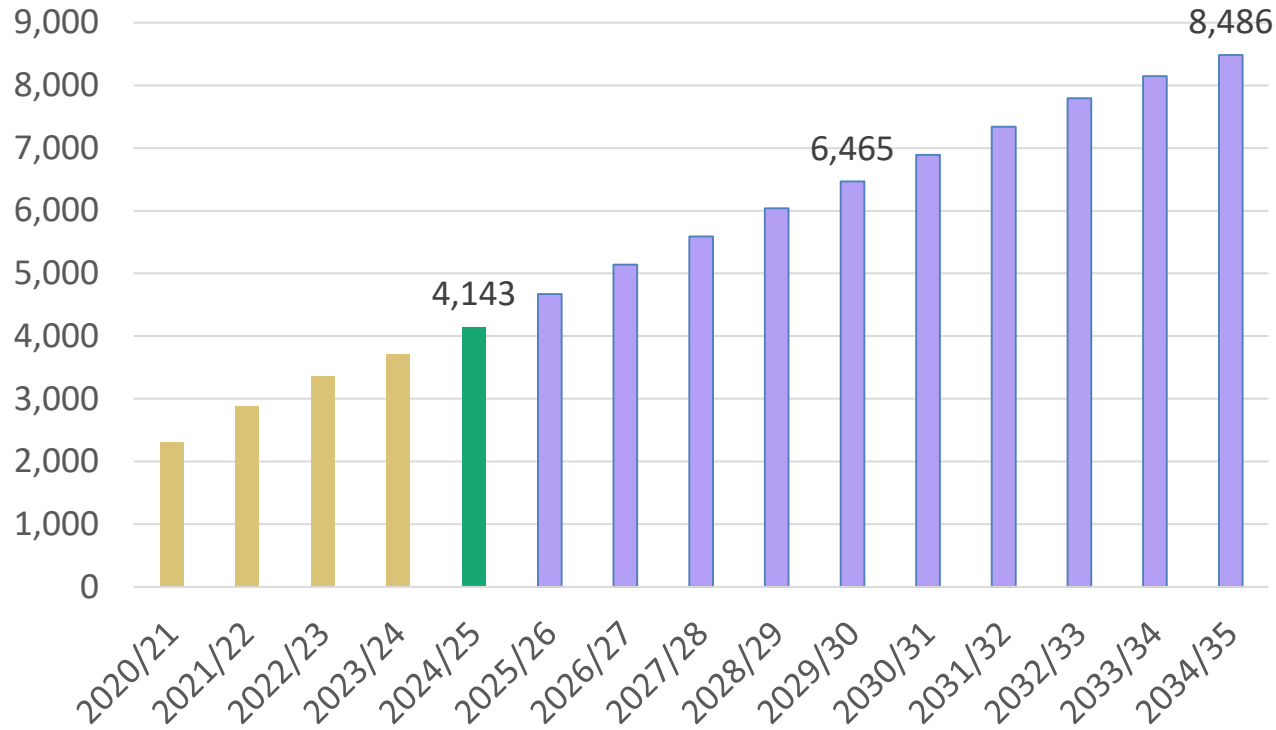
# Ten Year Forecast by Elementary Campus

Campus	Capacity	Fall	Fall	ENROLLMENT PROJECTIONS									
		2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35
Igo Elementary	800	552	643	726	757	769	785	783	802	826	851	862	872
Jarrell Elementary	608	657	715	762	805	827	837	824	833	828	826	827	828
Double Creek Elementary	900	706	781	926	1,072	1,240	1,366	1,501	1,656	1,808	1,948	2,058	2,173
<b>ELEMENTARY SCHOOL TOTAL</b>	<b>2,308</b>	<b>1,915</b>	<b>2,139</b>	<b>2,414</b>	<b>2,634</b>	<b>2,836</b>	<b>2,988</b>	<b>3,108</b>	<b>3,291</b>	<b>3,462</b>	<b>3,625</b>	<b>3,747</b>	<b>3,873</b>
Elementary Absolute Change		156	224	275	220	202	152	120	183	171	163	122	126
Elementary Percent Change		8.87%	11.70%	12.86%	9.11%	7.67%	5.36%	4.02%	5.89%	5.20%	4.71%	3.37%	3.36%
Jarrell Middle School	764/1,004	837	901	538	589	631	699	764	805	845	876	923	966
Jarrell Ranch Middle School	700			491	564	651	745	818	862	892	916	952	985
<b>MIDDLE SCHOOL TOTAL</b>		<b>837</b>	<b>901</b>	<b>1,029</b>	<b>1,153</b>	<b>1,282</b>	<b>1,444</b>	<b>1,582</b>	<b>1,667</b>	<b>1,737</b>	<b>1,792</b>	<b>1,875</b>	<b>1,951</b>
Middle School Absolute Change		96	64	-363	51	42	68	65	41	40	31	47	43
Middle School Percent Change		12.96%	7.65%	-40.29%	4.96%	3.64%	5.30%	4.50%	2.59%	2.40%	1.78%	2.62%	2.29%
Jarrell High School	995/1,258	957	1,101	1,226	1,351	1,472	1,607	1,773	1,932	2,137	2,374	2,521	2,660
<b>HIGH SCHOOL TOTAL</b>		<b>957</b>	<b>1,101</b>	<b>1,226</b>	<b>1,351</b>	<b>1,472</b>	<b>1,607</b>	<b>1,773</b>	<b>1,932</b>	<b>2,137</b>	<b>2,374</b>	<b>2,521</b>	<b>2,660</b>
High School Absolute Change		93	144	125	125	121	135	166	159	205	237	147	139
High School Percent Change		10.76%	15.05%	11.35%	10.20%	8.96%	9.17%	10.33%	8.97%	10.61%	11.09%	6.19%	5.51%
Lott Detention Center		4	2	2	2	2	2	2	2	2	2	2	2
<b>ALTERNATIVE SCHOOL TOTAL</b>		<b>4</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>2</b>
<b>DISTRICT TOTALS</b>		<b>3,713</b>	<b>4,143</b>	<b>4,671</b>	<b>5,140</b>	<b>5,592</b>	<b>6,041</b>	<b>6,465</b>	<b>6,892</b>	<b>7,338</b>	<b>7,793</b>	<b>8,145</b>	<b>8,486</b>
District Absolute Change		349	430	528	469	452	449	424	427	446	455	352	341
NEW HOME CLOSINGS													
STUDENT YIELD													
District Percent Change		10.37%	11.58%	12.74%	10.04%	8.79%	8.03%	7.02%	6.60%	6.47%	6.20%	4.52%	4.19%



# Key Takeaways

Enrollment Forecast



- New homes starts and closes are both down slightly for this quarter compared to the first quarter of 2024
- The district has 20 actively building subdivisions with over 2,600 lots available to build on
- JISD has 12 future subdivisions with overall total of 10,000 lots in the planning stages
- Groundwork is underway on more than 1,800 lots within 8 subdivisions
- Jarrell ISD is forecasted to enroll nearly 6465 students by 2029/30 and more than 8,486 by 2034/35