

Waller ISD

Demographic Study

Population and Survey Analysts

Spring 2025

Presenter:
Dr. Stacey Tepera, President

Demographic Study Components

- Demographic Trends
- Past & Current Students
- Economy and Housing
- Student Projections

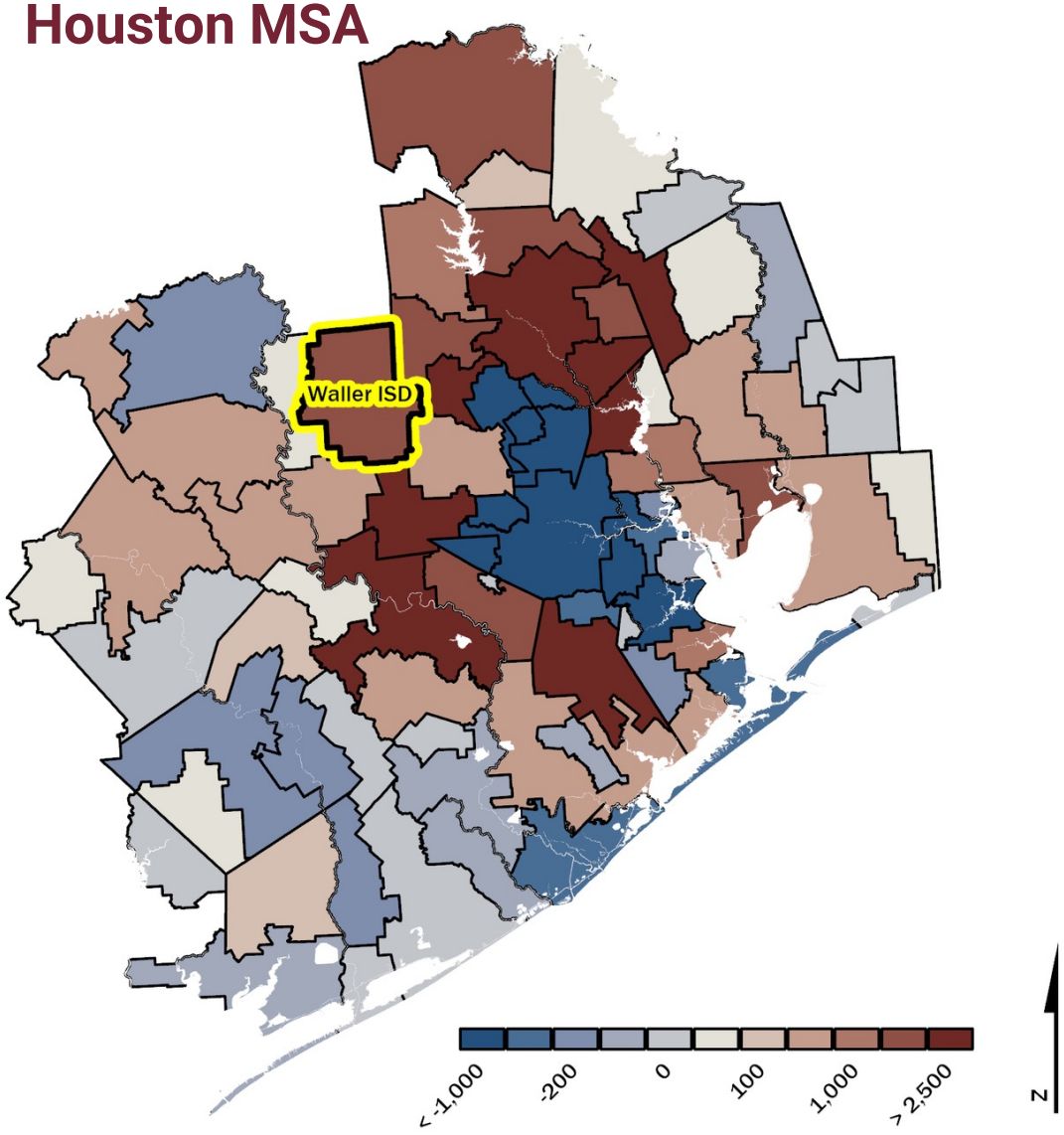




Five-Year Numerical Change in Enrollment

Fall 2019 - Fall 2024

Houston MSA



District	Enrollment 2024-25	Five-Year Change		
		Numeric	Rank	Percent
Katy ISD	96,111	12,688	1	15.21%
Lamar CISD	46,786	11,630	2	33.08%
Conroe ISD	72,914	8,115	3	12.52%
Cleveland ISD	12,513	4,924	4	64.88%
Tomball ISD	22,913	4,619	5	25.25%
Humble ISD	48,502	3,424	6	7.60%
New Caney ISD	19,420	3,310	7	20.55%
Alvin ISD	30,038	3,016	8	11.16%
Waller ISD	**9,905**	**2,176**	**9**	**28.15%**
Fort Bend ISD	79,663	1,907	10	2.45%
Huntsville ISD	10,960	1,791	11	19.53%
Magnolia ISD	14,916	1,626	12	12.23%
Barbers Hill ISD	7,875	1,617	13	25.84%
Splendora ISD	5,687	1,510	14	36.15%
Willis ISD	9,313	1,448	15	18.41%
Dickinson ISD	12,554	899	16	7.71%
Montgomery ISD	9,889	864	17	9.57%
Sheldon ISD	10,946	813	18	8.02%
Crosby ISD	7,046	594	19	9.21%
Cypress-Fairbanks ISD	117,927	481	20	0.41%
Royal ISD	2,884	387	21	15.50%
Needville ISD	3,650	319	22	9.58%
Sealy ISD	3,109	297	23	10.56%
Angleton ISD	7,105	244	24	3.56%
Hitchcock ISD	2,012	240	25	13.54%
Anahuac ISD	1,552	209	26	15.56%

Ranked **9th** in this region for total student growth

28.15% increase over five years

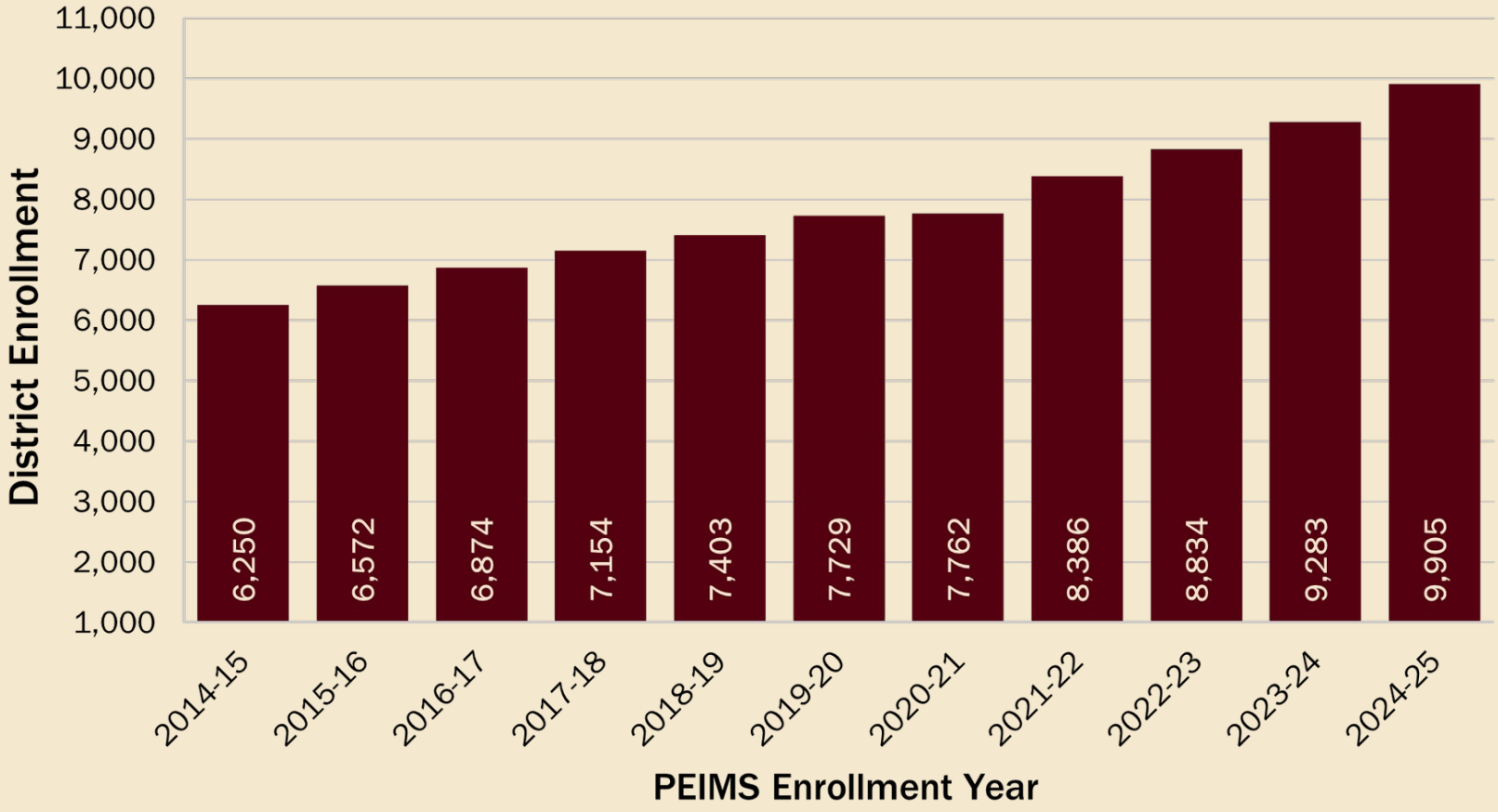
2,176 student increase over five years

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Source: Texas Education Agency (TEA)

Past Enrollment Change

Waller ISD Historical Enrollment



+2,176

Five Year Change

enrollment change
2019 to 2024

+3,655

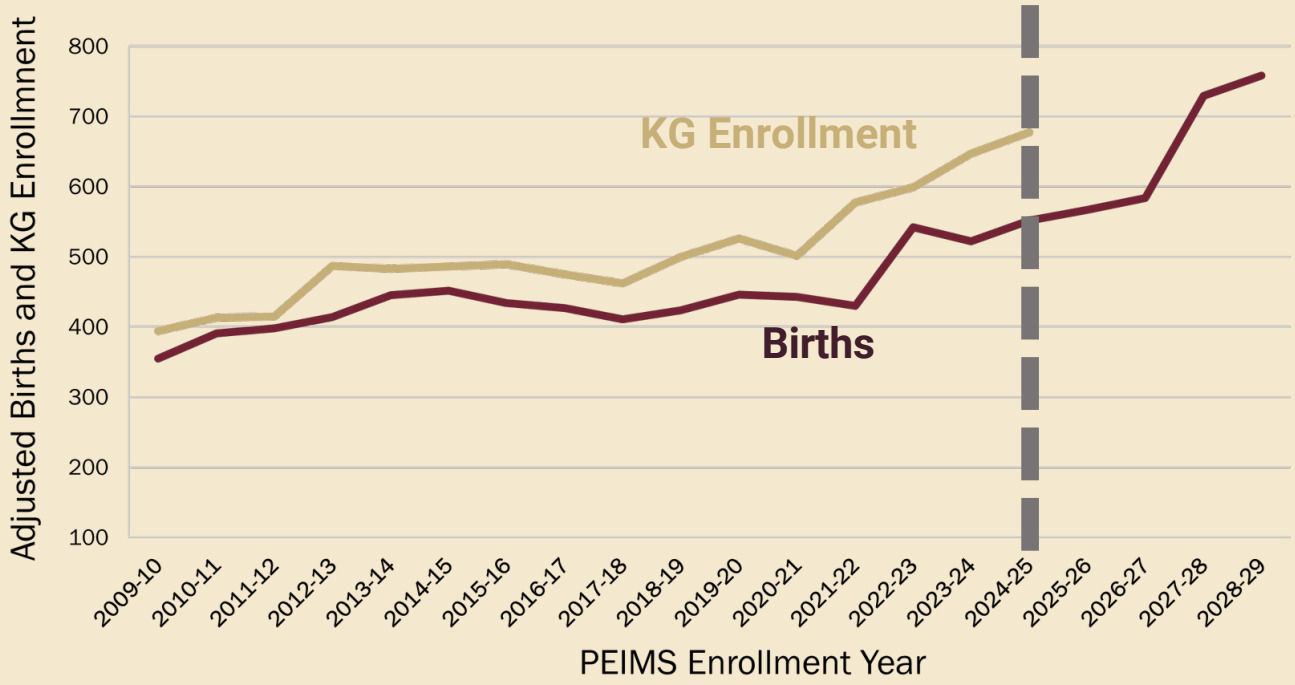
Ten Year Change

enrollment change
2014 to 2024

Source: Texas Education Agency (TEA)



KG Enrollment vs. Births



Difference Between Two Lines Shows Inmigration of Young Children After Birth

Births Adjusted Five Years to Align with KG Enrollment

Births by Zip Code of Birth Mother

Source: Texas Education Agency (TEA)
Source: Texas Department of Health and Human Services, Vital Statistics

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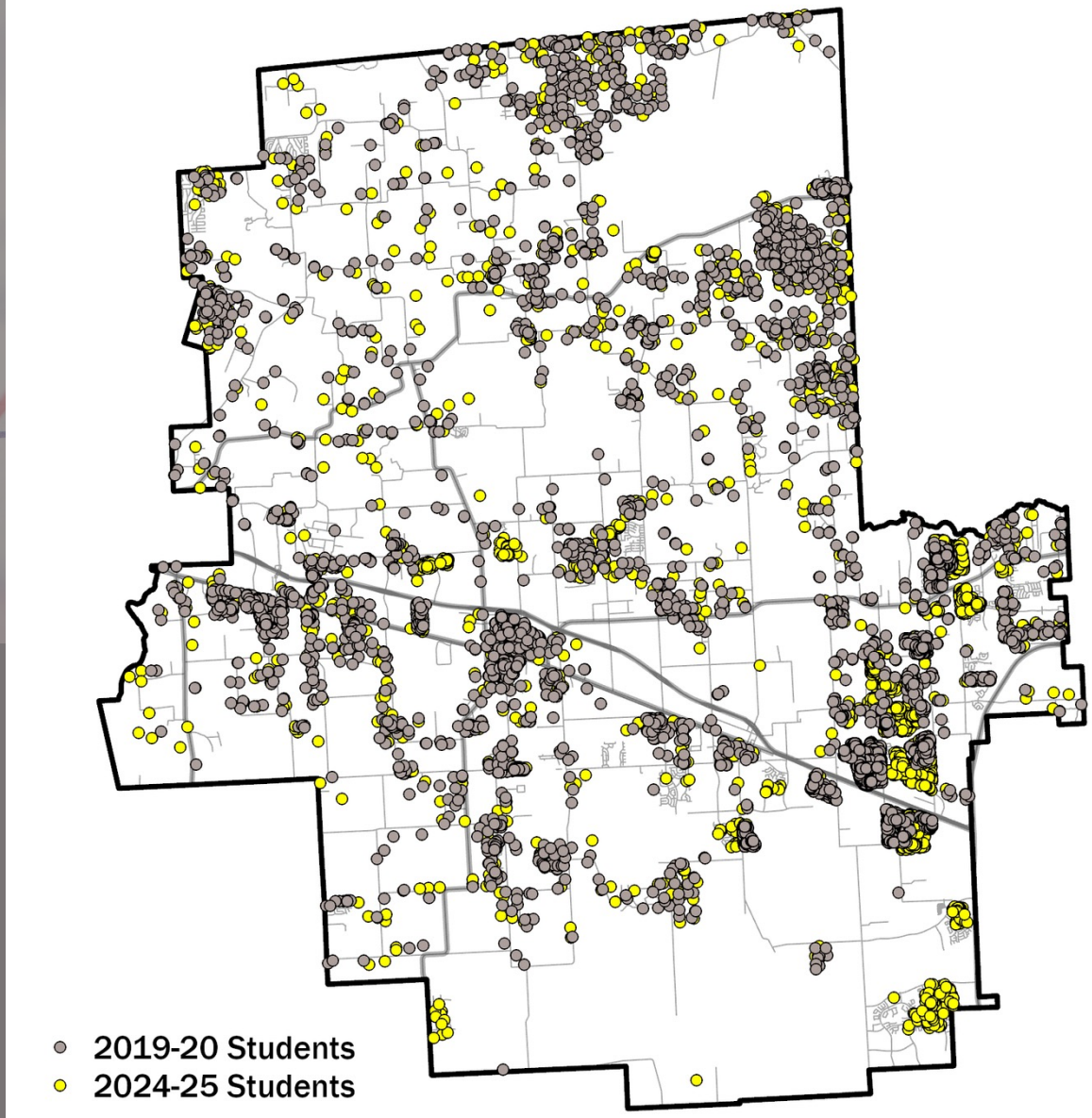


Student Geocode



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

Yellow areas highlight homes where students currently reside but where no students lived in 2019-20, highlighting patterns of student growth and distribution across the District.



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Historical Enrollment by Grade

Historical Enrollment

GRADE	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25
EE	36	28	31	40	57	41	41	42	58	60
PK	236	238	259	248	250	215	311	379	331	363
KG	489	475	462	500	526	501	577	599	647	677
1	505	513	506	499	541	554	572	616	670	733
2	519	536	554	537	528	544	600	624	663	731
3	551	549	579	567	569	546	593	646	676	721
4	476	587	578	612	603	581	602	629	681	741
5	480	503	597	606	642	608	629	641	659	732
6	462	510	526	650	650	663	639	657	690	700
7	453	490	532	553	662	642	695	635	674	731
8	494	478	514	559	578	669	685	727	687	716
9	567	549	528	554	601	603	779	861	895	886
10	516	533	533	503	549	586	596	708	757	793
11	450	501	521	515	515	529	615	599	709	718
12	338	384	434	460	458	480	452	471	486	603
TOTAL	6,572	6,874	7,154	7,403	7,729	7,762	8,386	8,834	9,283	9,905

smallest class — largest class

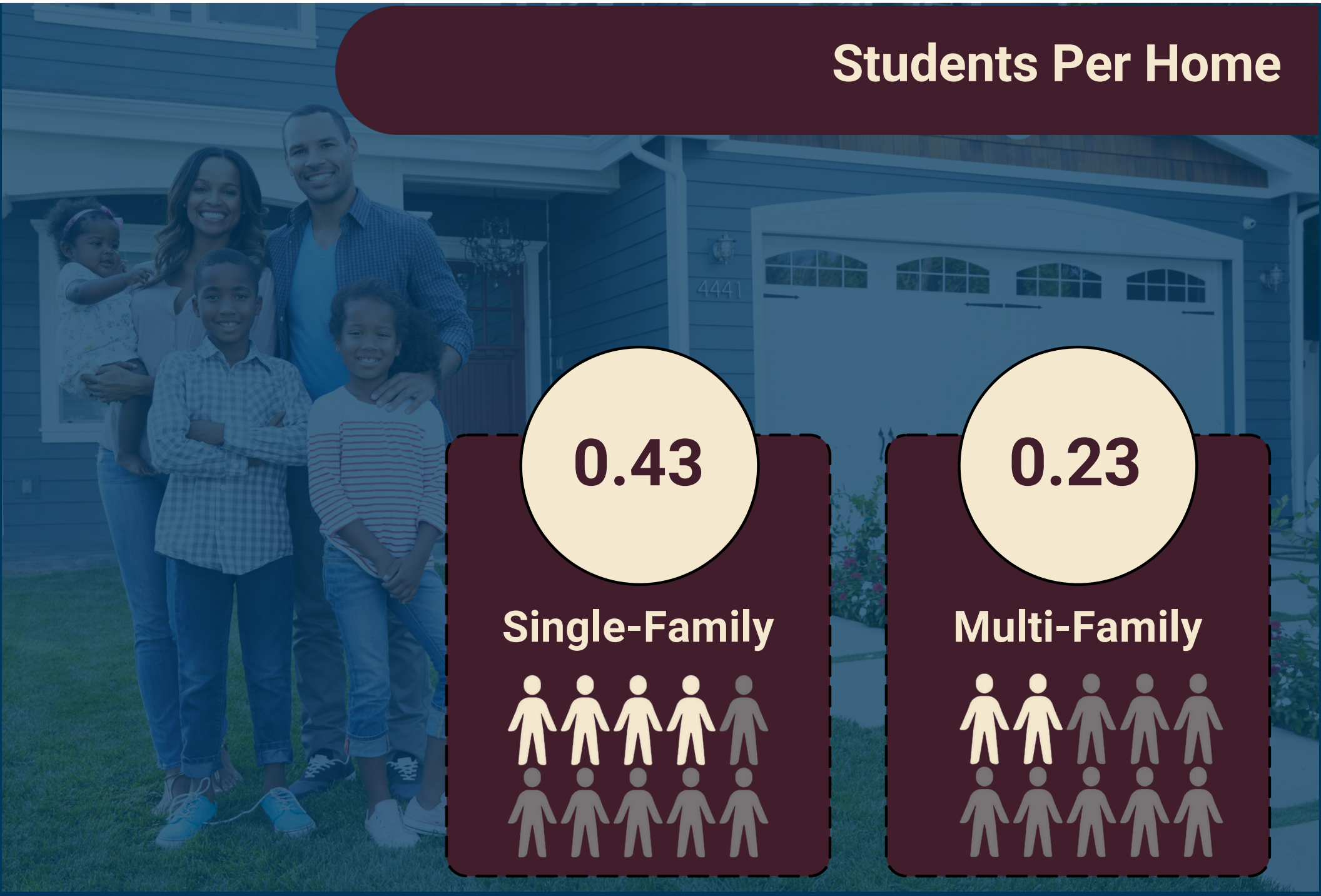
The largest cohorts (red) have been aging through the grade levels for the past decade.

In the next four years, those large grades will graduate and be replaced by smaller (blue) KG classes.

This will cause base-level decreases in high school students -- BUT these will be counteracted by students enrolling due to new housing.

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Students Per Home



0.43

Single-Family

0.23

Multi-Family

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Demographic Study Components

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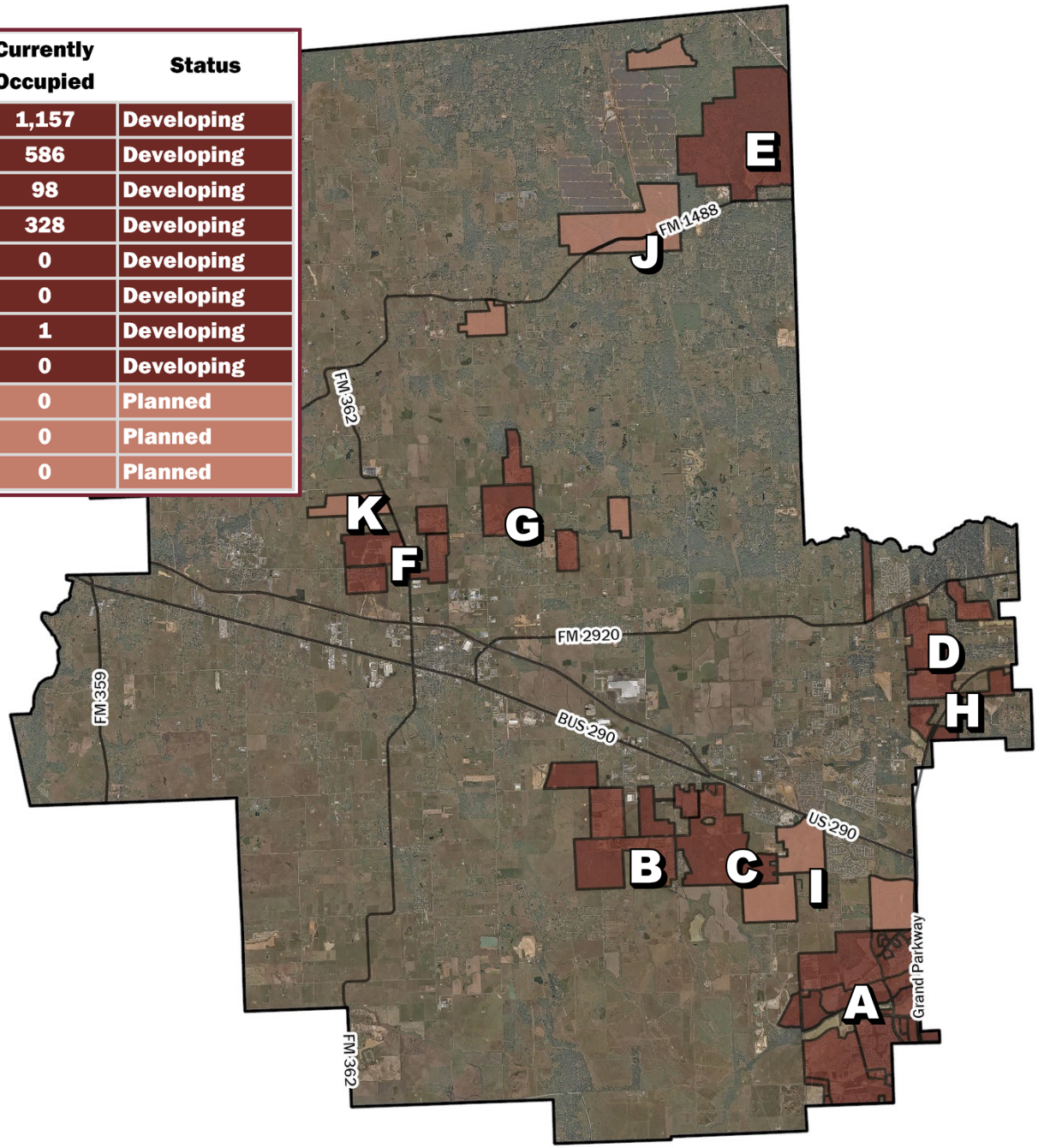




Impactful Single-Family Developments

Ten-Year Projected New Occupancies >500

	Development	Units Projected	Currently Occupied	Status
A	Bridgeland	5,712	1,157	Developing
B	Grand Prairie	4,024	586	Developing
C	Jubilee	3,320	98	Developing
D	Cypress Green	1,932	328	Developing
E	Woodhaven Estates	1,830	0	Developing
F	Attwater	1,200	0	Developing
G	Wild Rye	1,065	1	Developing
H	Rosewood	1,020	0	Developing
I	Golden Shamrock/Gold Star Realty Tract	1,340	0	Planned
J	Rice Tract	1,340	0	Planned
K	Cameron Prairie	1,205	0	Planned



Largest Single-Family Subdivisions

Ten-Year Projected New Occupancies

5,712 units

Bridgeland

- Approximately 16% built-out
- Estimated 1,050 homes occupied February 2025
- >5,700 projected
- Buildout projected by end of projection period.

4,024 units

Grand Prairie

- Approximately 10% built-out
- Estimated 600 homes occupied February 2025
- >4,000 projected
- Approximately 6,000 total units
- Buildout estimated beyond projection period (2035).

3,320 units

Jubilee

- Approximately 2% built-out
- Estimated 100 homes occupied February 2025
- >3,300 projected
- Approximately 4,200 homes total
- Buildout estimated beyond projection period.

1,932 units

Cypress Green

- Approximately 14% built-out
- >325 homes occupied February 2025
- >1,900 projected
- Buildout projected by late 2032.

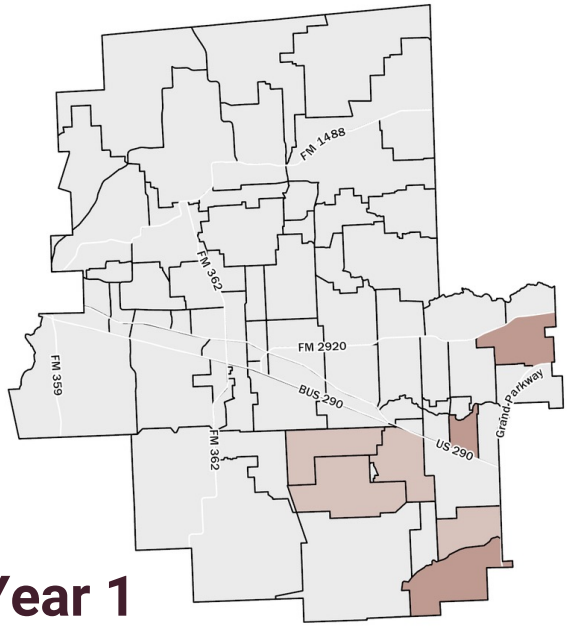
1,830 units

Woodhaven Estates

- Development has begun on entrance from FM 1488 and Lagoon
- >1,800 projected
- Nearly 7,000 total homes planned
- Buildout estimated beyond projection period.

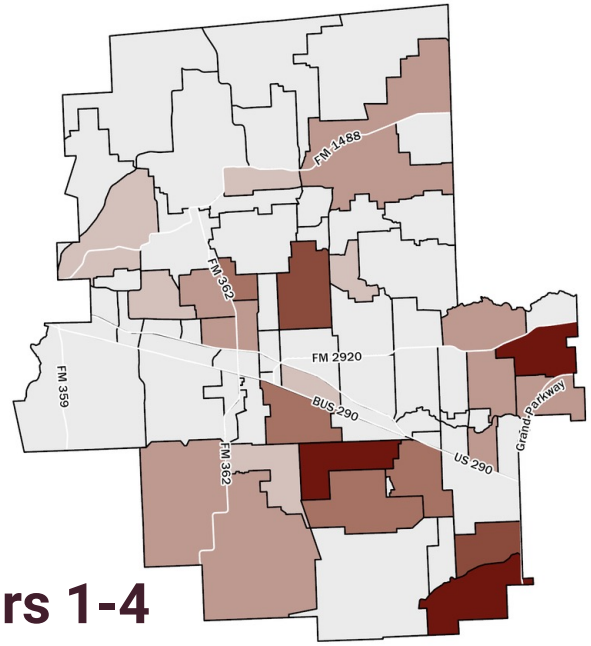
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Projected New Single-Family Occupancies by Planning Unit



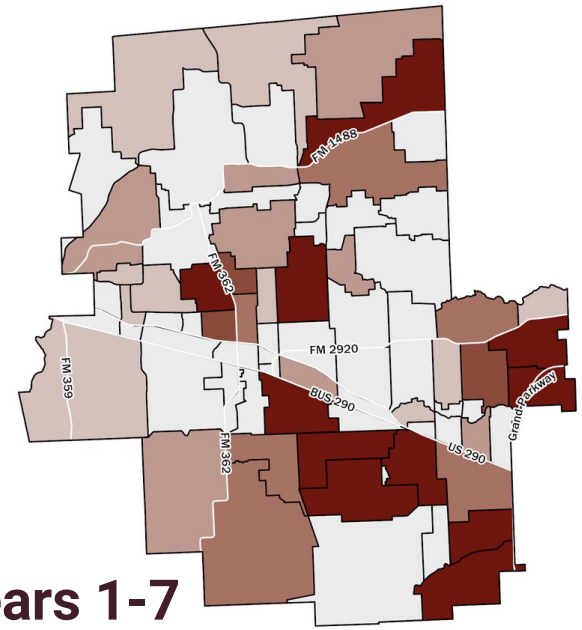
Year 1

Feb 2025 through Oct 2025



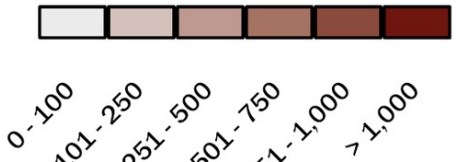
Years 1-4

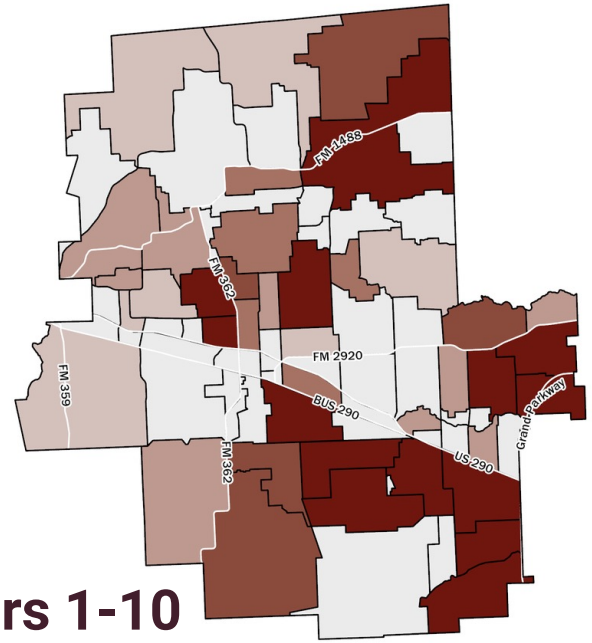
Oct 2024 through Oct 2028



Years 1-7

Oct 2024 through Oct 2031

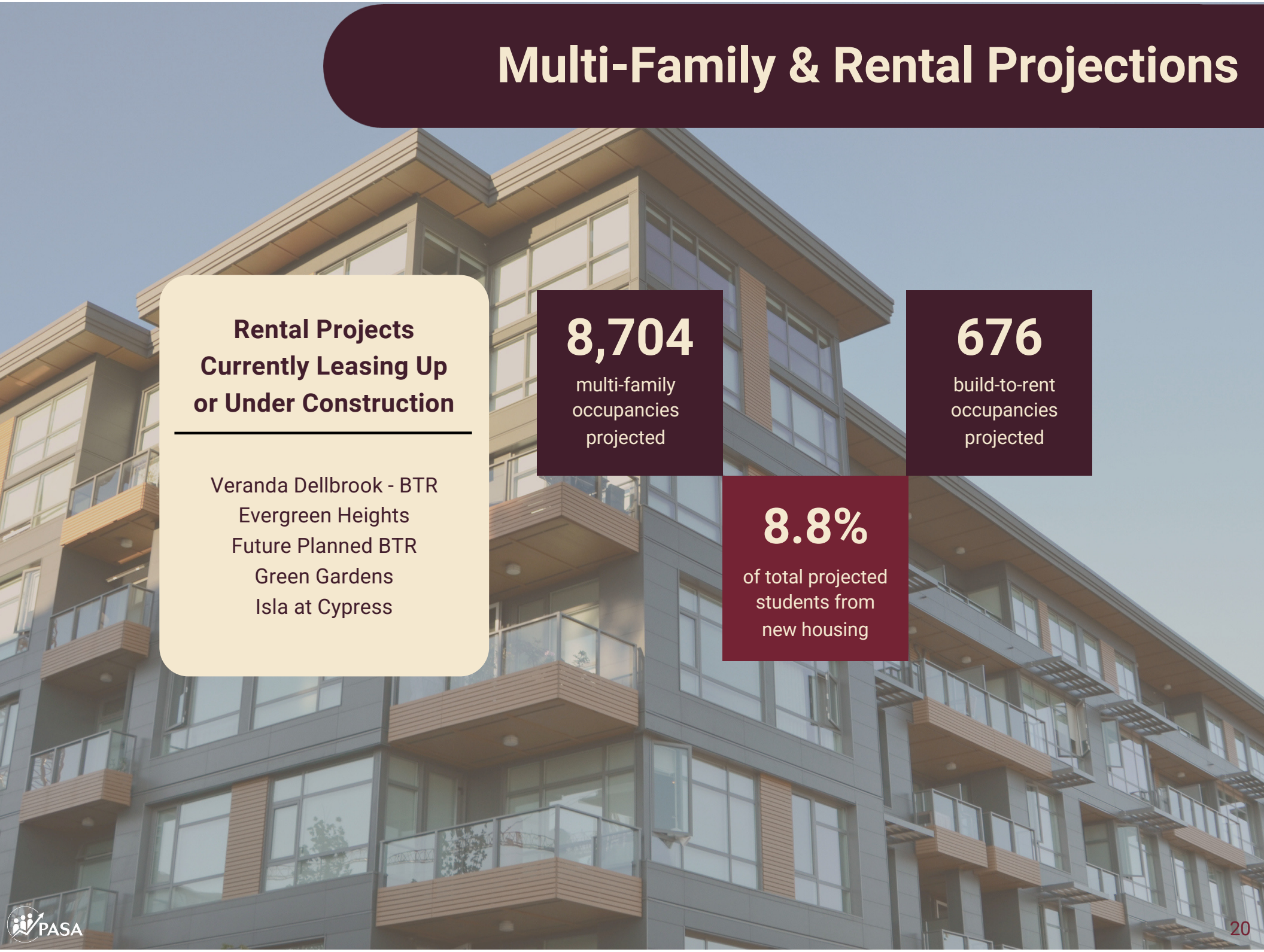




Years 1-10

Feb 2025 through Oct 2034

Multi-Family & Rental Projections



Rental Projects Currently Leasing Up or Under Construction

Veranda Dellbrook - BTR
Evergreen Heights
Future Planned BTR
Green Gardens
Isla at Cypress

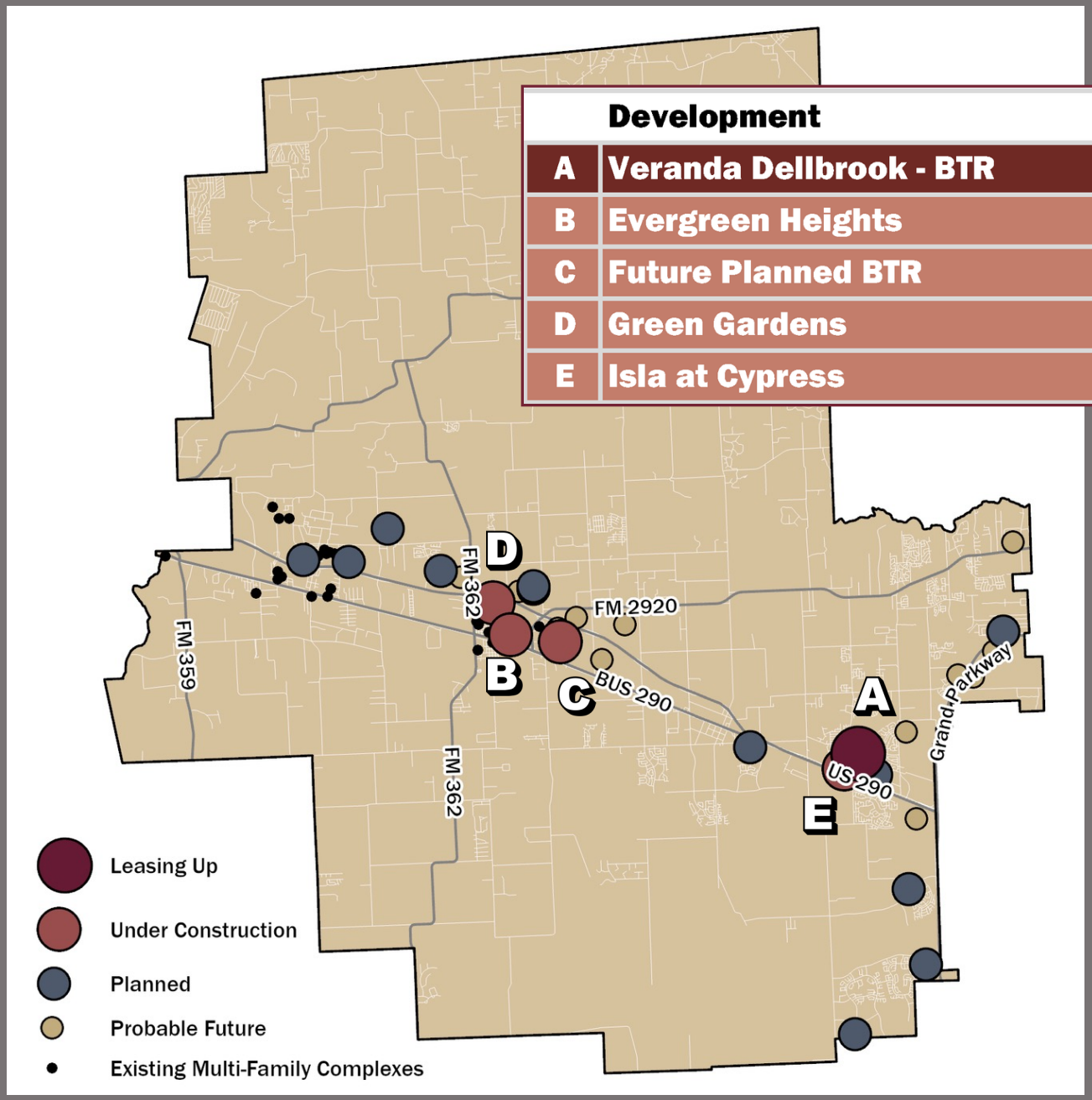
8,704
multi-family occupancies projected

676
build-to-rent occupancies projected

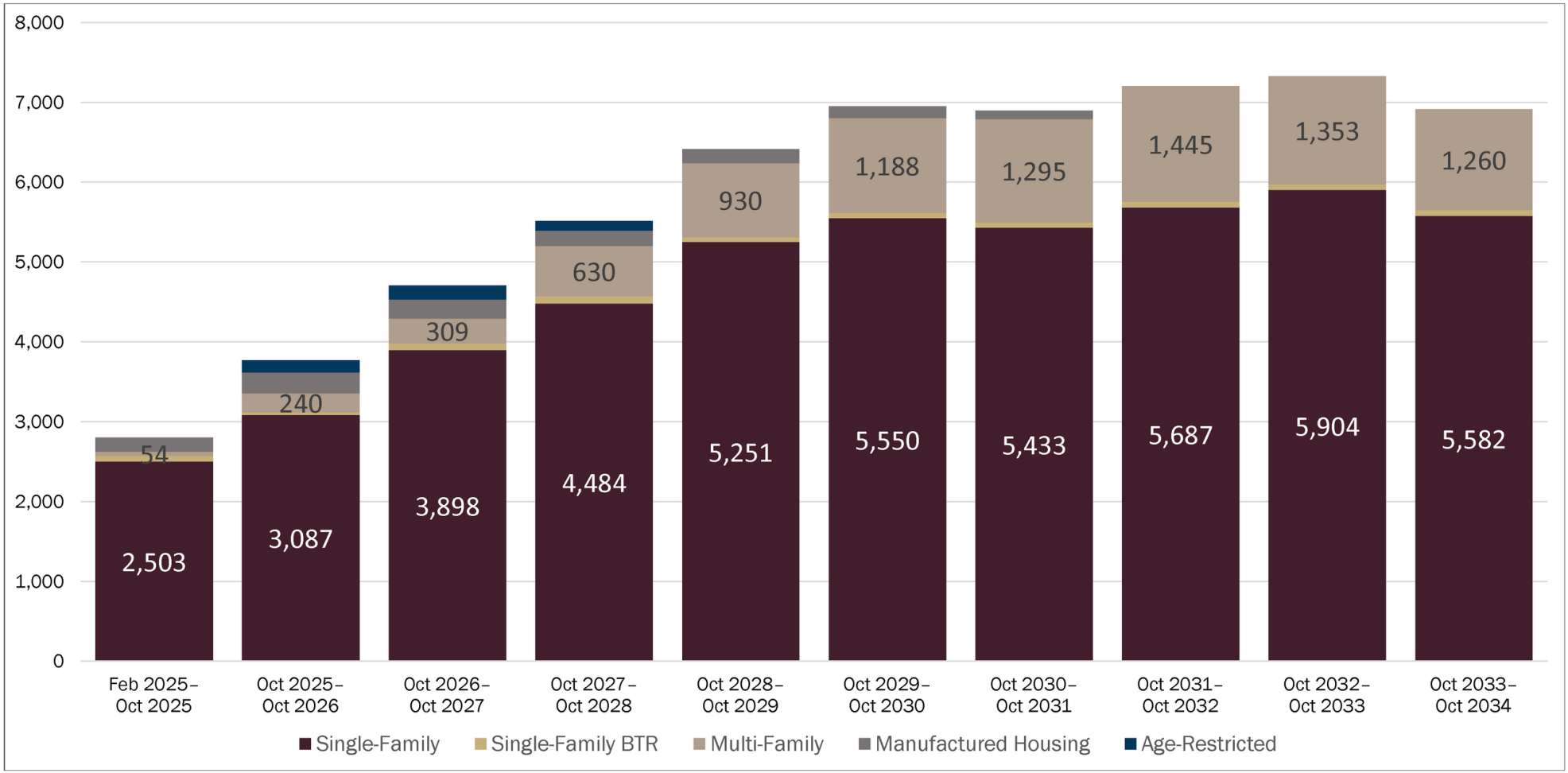
8.8%
of total projected students from new housing

Projected New Multi-Family & Rental Development

	Development	Status	Units
A	Veranda Dellbrook - BTR	Leasing Up	182
B	Evergreen Heights	Developing	14
C	Future Planned BTR	Developing	515
D	Green Gardens	Developing	127
E	Isla at Cypress	Developing	297



Housing Projections by Year of Occupancy



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Ten-Year Total Projected New Occupancies

48,055
82.1% of Total
SINGLE-FAMILY & BUILD-TO-RENT

8,704
14.9% of Total
MULTI-FAMILY

1,298
2.2% of Total
MANUFACTURED

445
0.8% of Total
AGE-RESTRICTED

58,502
TOTAL PROJECTED NEW HOUSING OCCUPANCIES

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Demographic Study Components

- Demographic Trends
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Student Projection Factors

Factors Impacting Future Enrollment

Births

Births to mothers in Waller ISD have increased in the last five years, especially visible in a bulge in the 2027-28 KG class

Incoming KG Class Size

Incoming KG class sizes are growing, driven by births and entry-level new home construction. Large KG classes perpetuate growth in later years

Regeneration

Students moving into existing homes balances the loss of graduating seniors; these neighborhoods are stable

Aging of Current Students

Large cohort has been aging through WISD grades; currently in High School grades; graduation of these big classes in the next few years will temper growth

Alternative Educational Opportunities

A new Harmony charter campus and Cypress Christian are opening in Bridgeland in Aug 2025; anticipated to attract Waller ISD residents along the 99 corridor

New Housing Construction

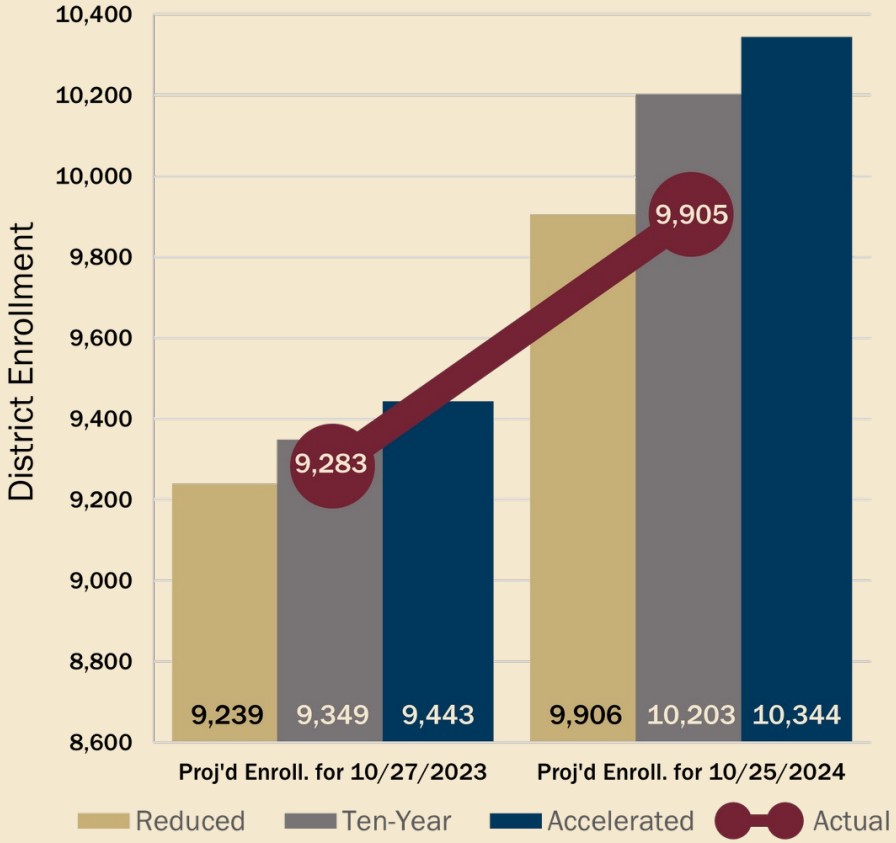
Primary growth driver, adding 1,000-2,500 students per year, accelerating as neighboring Cy-Fair ISD builds out

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What Has Changed Since Last Study?

PASA Demographic Study - April 2023

Enrollment Projection Scenarios
compared to
Actual Enrollment



Sources: PASA 2022-23 Demographic Study; Texas Education Agency (TEA)

Housing

- New housing has accelerated significantly
- Fewer students per home in new construction
- The students in new construction are more commonly in the youngest grades
- Demand for new housing accelerates as CFISD builds out

Births and KG

- Births to mothers living in WISD are increasing, especially as new housing construction continues
- Recent year of births will yield big KG class in 2027-28

Alternative Educational Opportunities

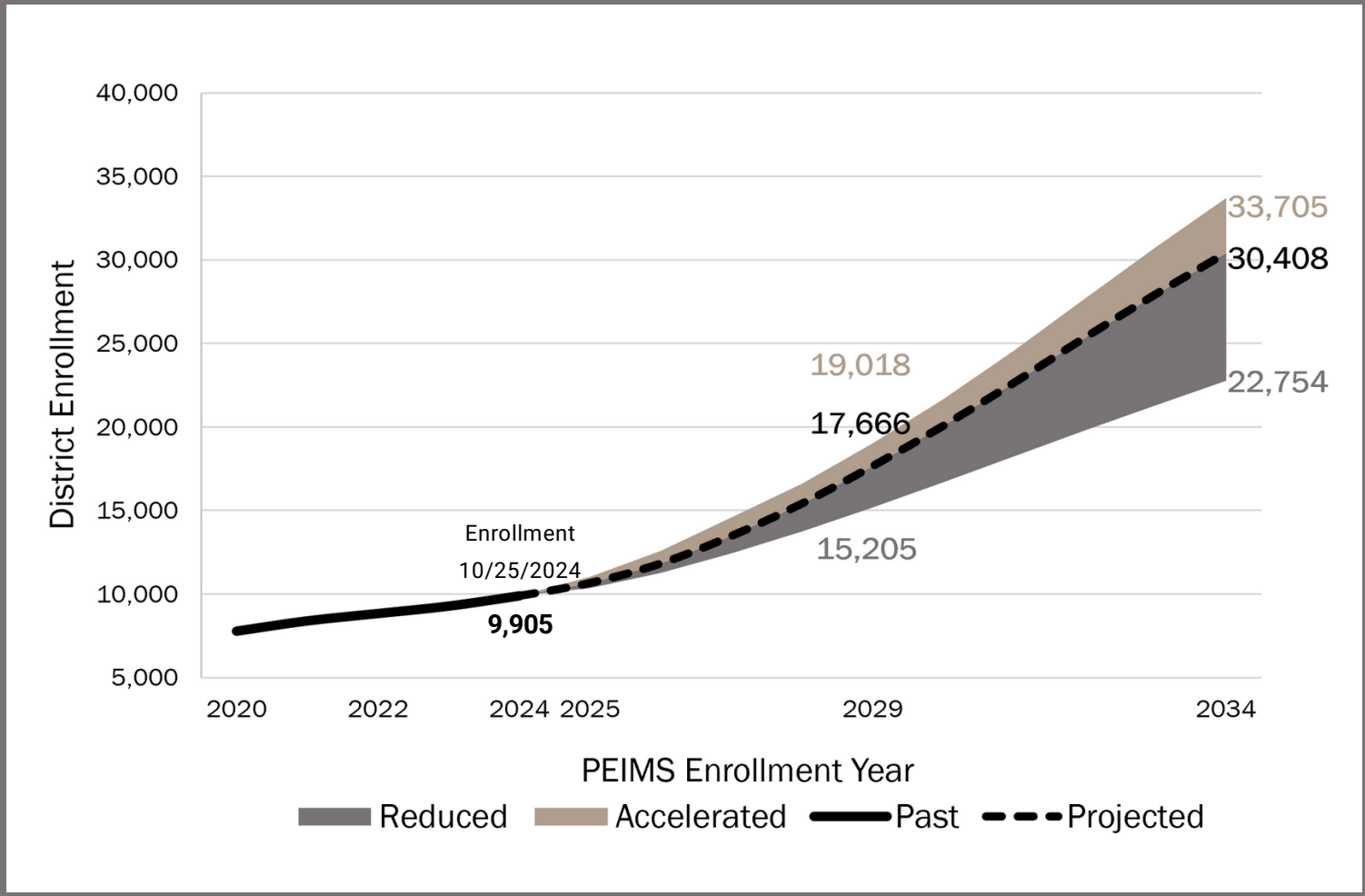
- Harmony Science Academy
- Cypress Christian
- Both opening in 2025-26 in Bridgeland

Waller ISD Enrollment Forecast

Every year starts with a clean slate -- not impacted by the previous year's accuracy

The Enrollment Forecast represents the most likely scenario based on the best information available at the time

Reduced and Accelerated Scenarios are also feasible, assuming changing circumstances



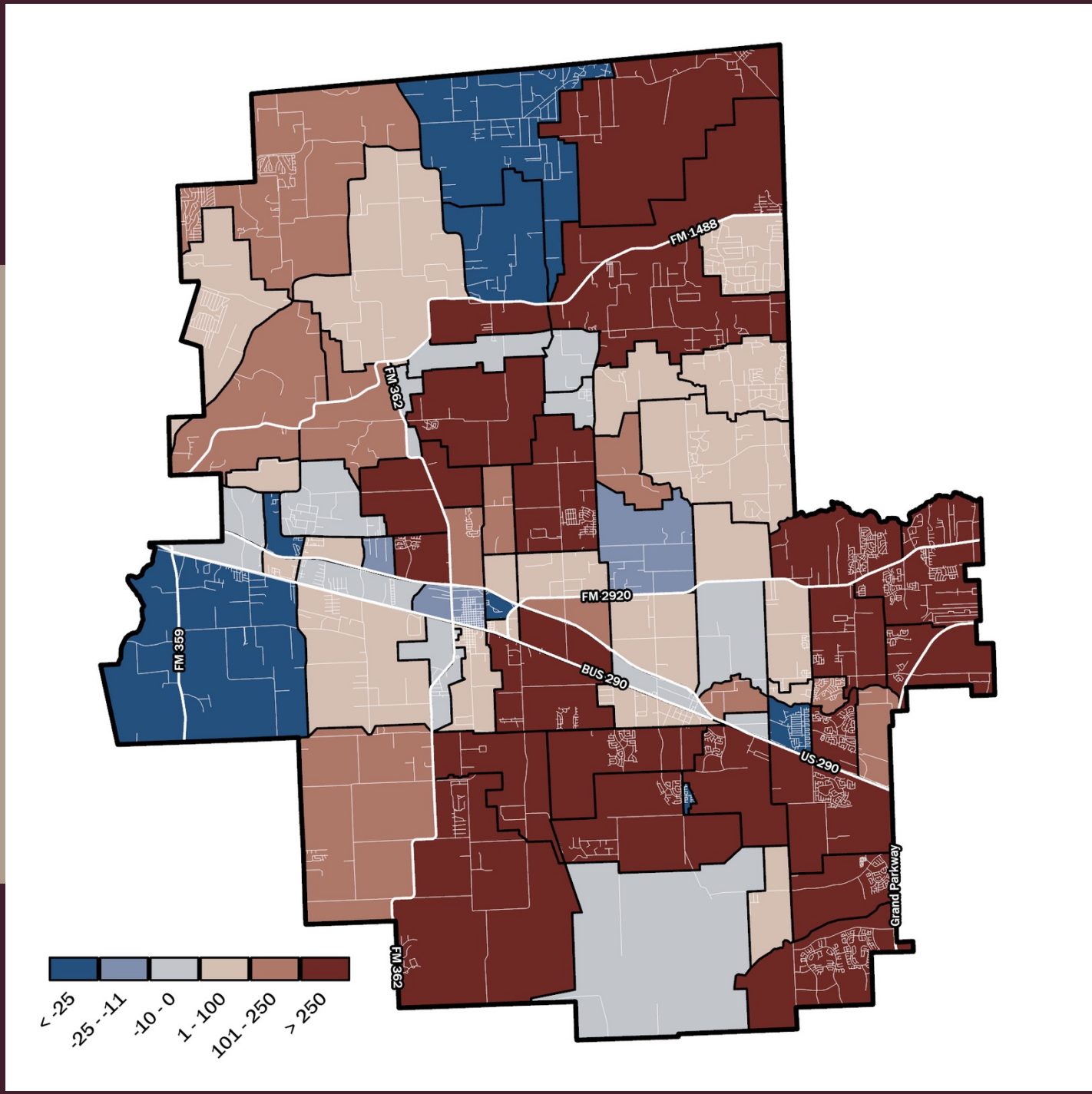
The Accelerated and Reduced Enrollment Scenarios account for potential changes in factors affecting enrollment, such as fluctuations in mortgage rates, housing construction, new charter school plans, birth rates, and resulting kindergarten class sizes.

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Projected Change in EE-12th Resident Students

Fall 2024 - Fall 2034

by Planning Unit

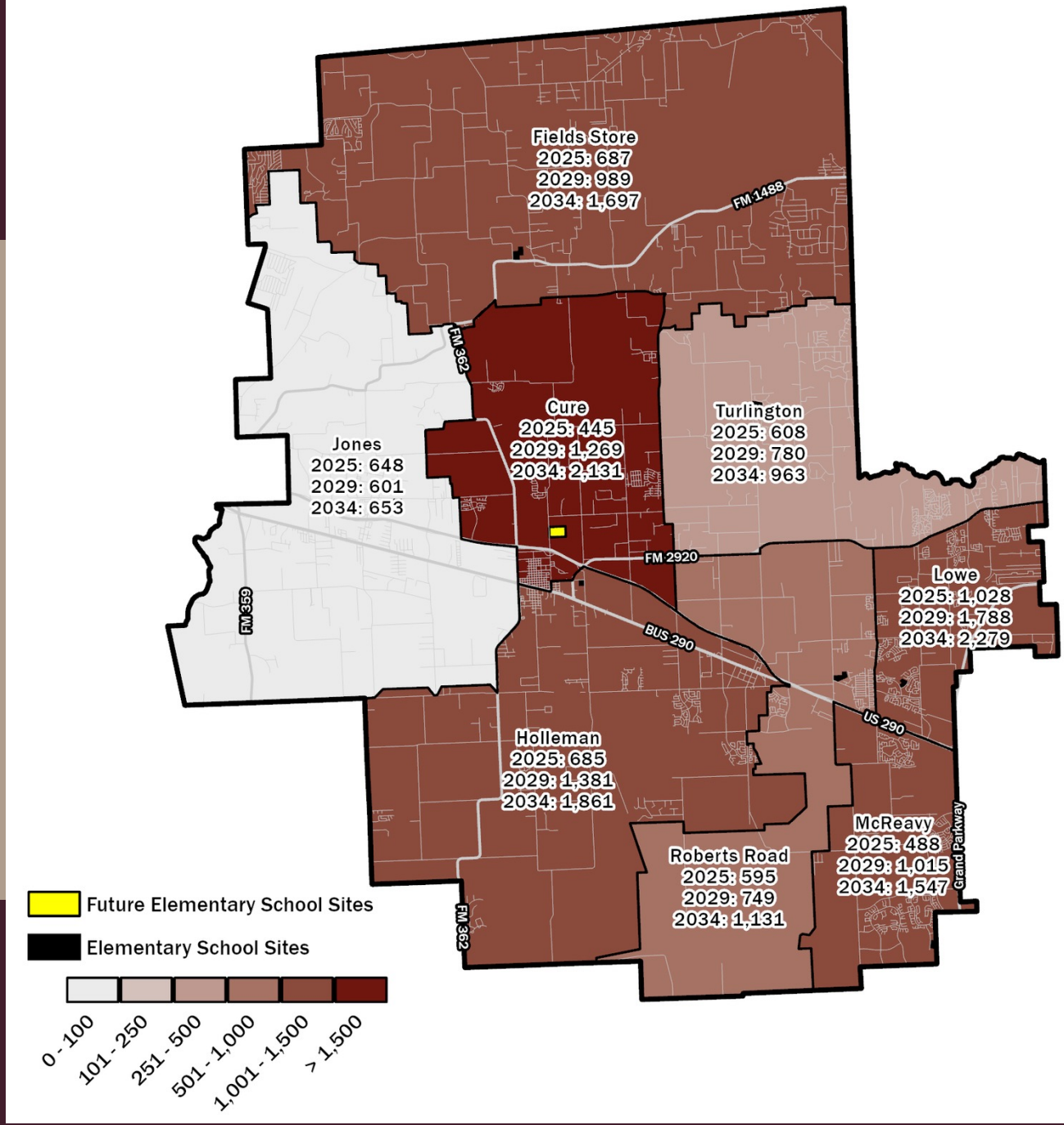


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Projected Growth in Elementary School Students

Fall 2024 - Fall 2034

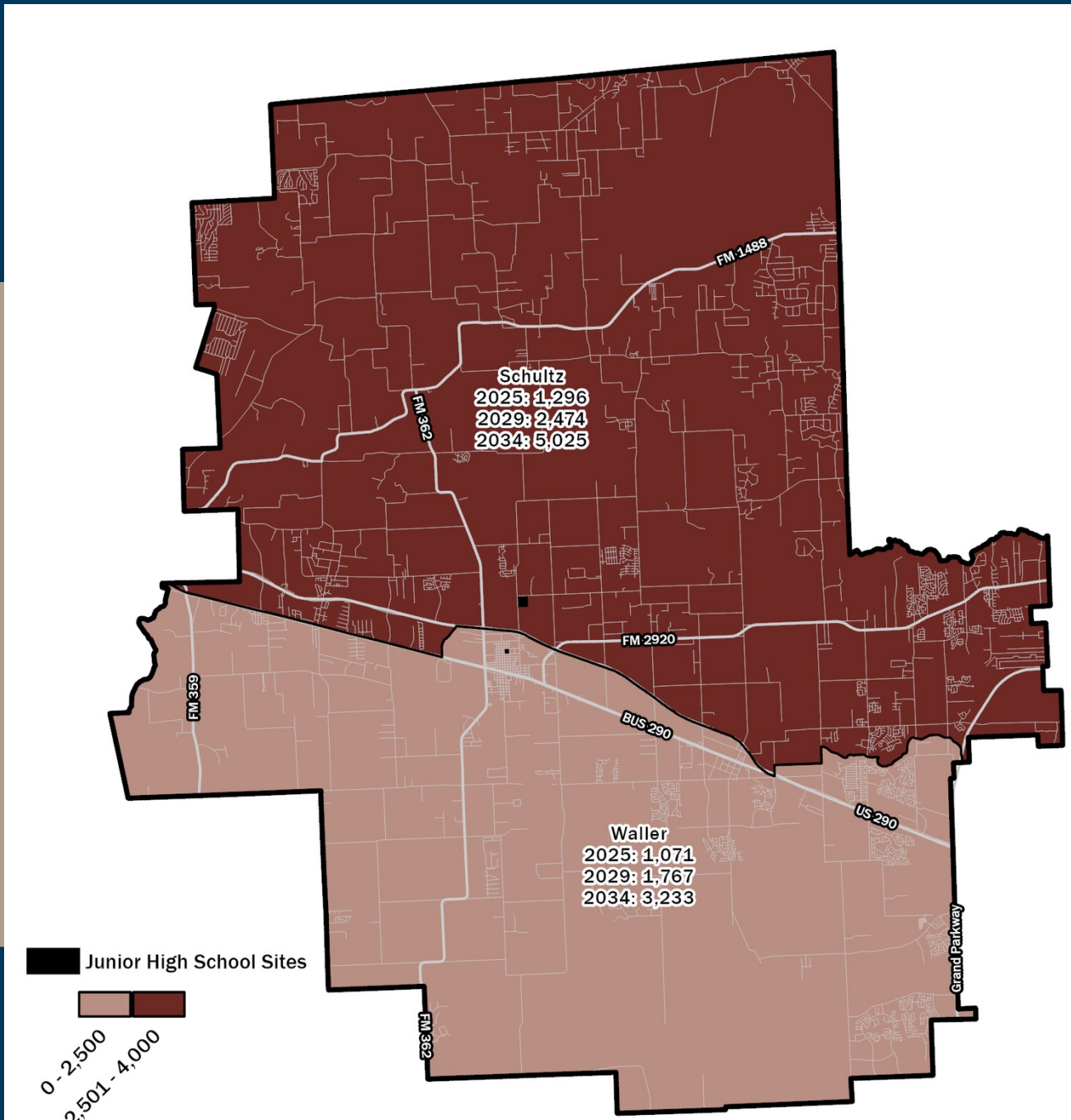
by Attendance Zone



Projected Growth in Junior High School Students

Fall 2024 - Fall 2034

by Attendance Zone



Projected Resident High School Students

Projected Resident High School Students

	Capacity	Current	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
Waller HS												
Students	3,500	2,980	3,109	3,351	3,637	4,106	4,809	5,571	6,534	7,595	8,619	9,802
Utilization		85%	89%	96%	104%	117%	137%	159%	187%	217%	246%	280%

Projected student population exceeds 100% of capacity

Projected student population exceeds 120% of capacity



QUESTIONS?

Population and Survey Analysts

www.pasatx.com