



# Cypress-Fairbanks ISD

# Demographic Study

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*Population and Survey Analysts*

**Spring 2025**

**Presenters:**

**Dr. Stacey Tepera, President**

**Angela Fritz, Demographer**

# Demographic Study

## Components

Demographic Trends

Past & Current Students

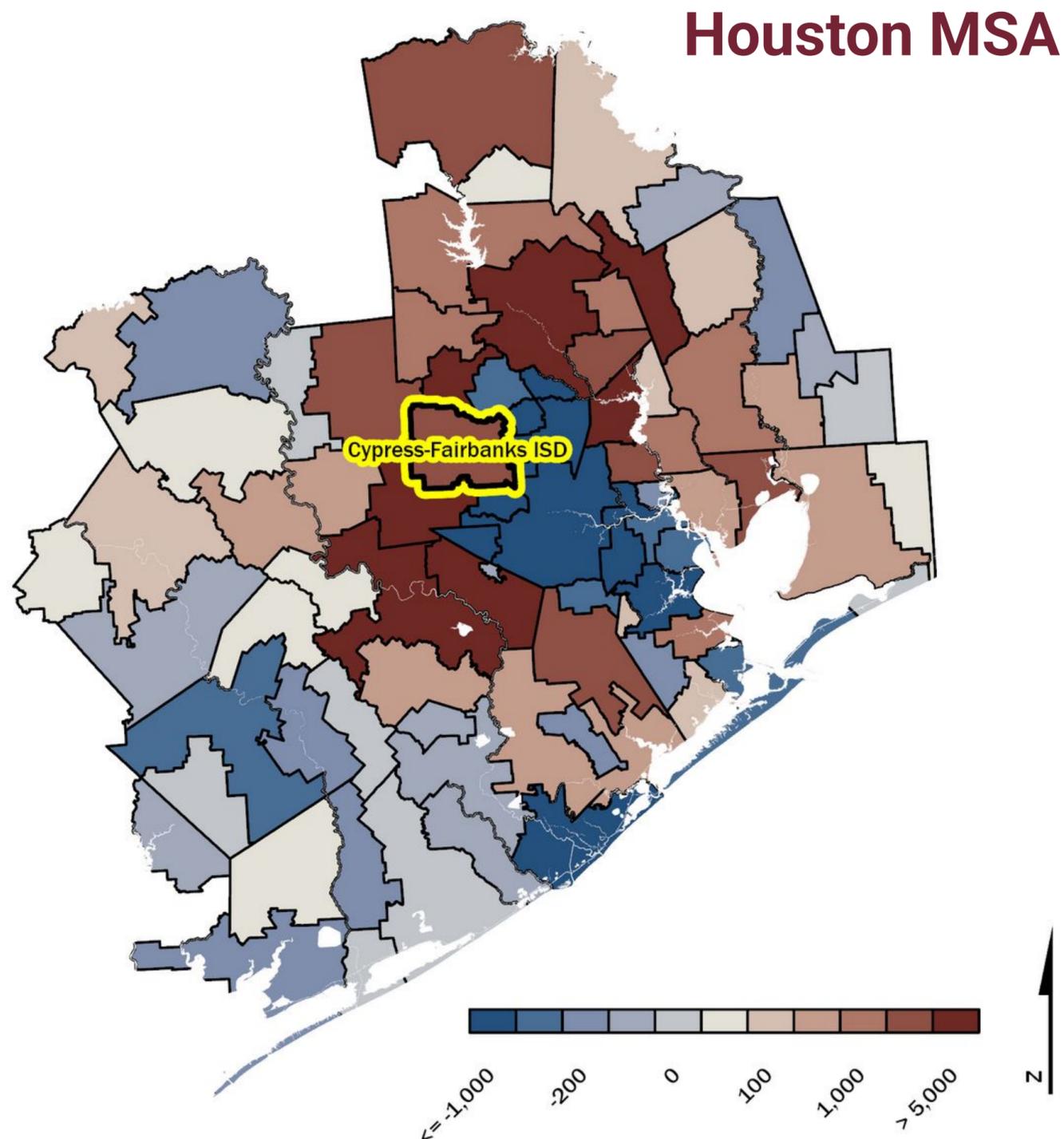
Economy and Housing

Student Projections



# Five-Year Numerical Change in Enrollment

Fall 2018 - Fall 2023



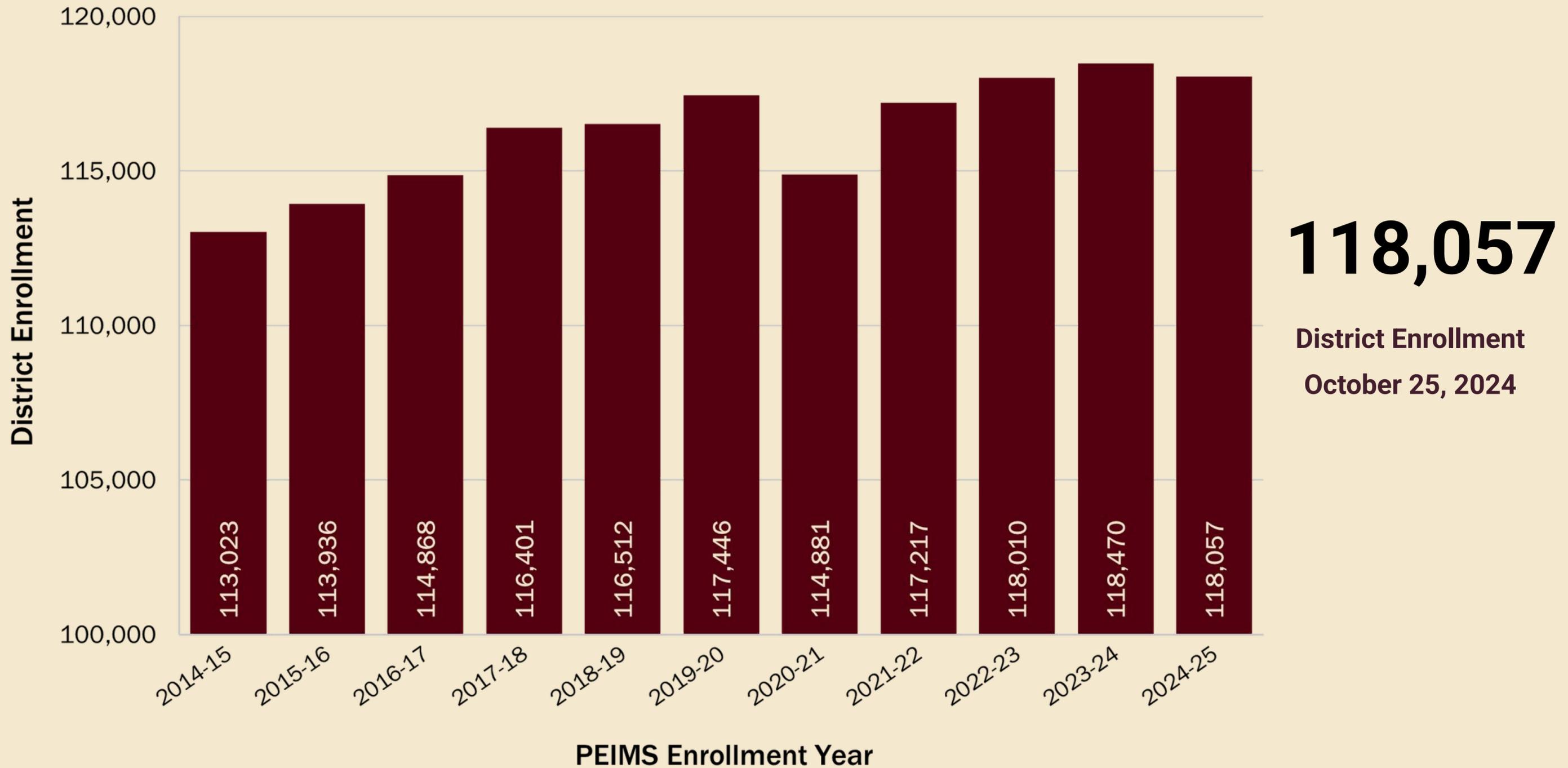
District	Enrollment 2023-24	5-Year Change		
		Numeric	Rank	Percent
Katy ISD	94,785	14,872	1	18.6%
Lamar CISD	44,512	11,068	2	33.1%
Conroe ISD	72,352	9,515	3	15.1%
Cleveland ISD	11,970	5,386	4	81.8%
Tomball ISD	22,273	5,311	5	31.3%
Humble ISD	48,552	4,999	6	11.5%
Fort Bend ISD	80,206	4,084	7	5.4%
Alvin ISD	29,740	3,795	8	14.6%
New Caney ISD	18,987	3,606	9	23.4%
Huntsville ISD	11,318	2,390	10	26.8%
Barbers Hill ISD	7,723	1,991	11	34.7%
<b>Cypress-Fairbanks ISD</b>	<b>118,470</b>	<b>1,958</b>	<b>12</b>	<b>1.7%</b>
Waller ISD	9,283	1,880	13	25.4%
Sheldon ISD	11,028	1,627	14	17.3%
Willis ISD	8,974	1,481	15	19.8%

**12th** in the region for total student growth

**1.7%** increase over five years

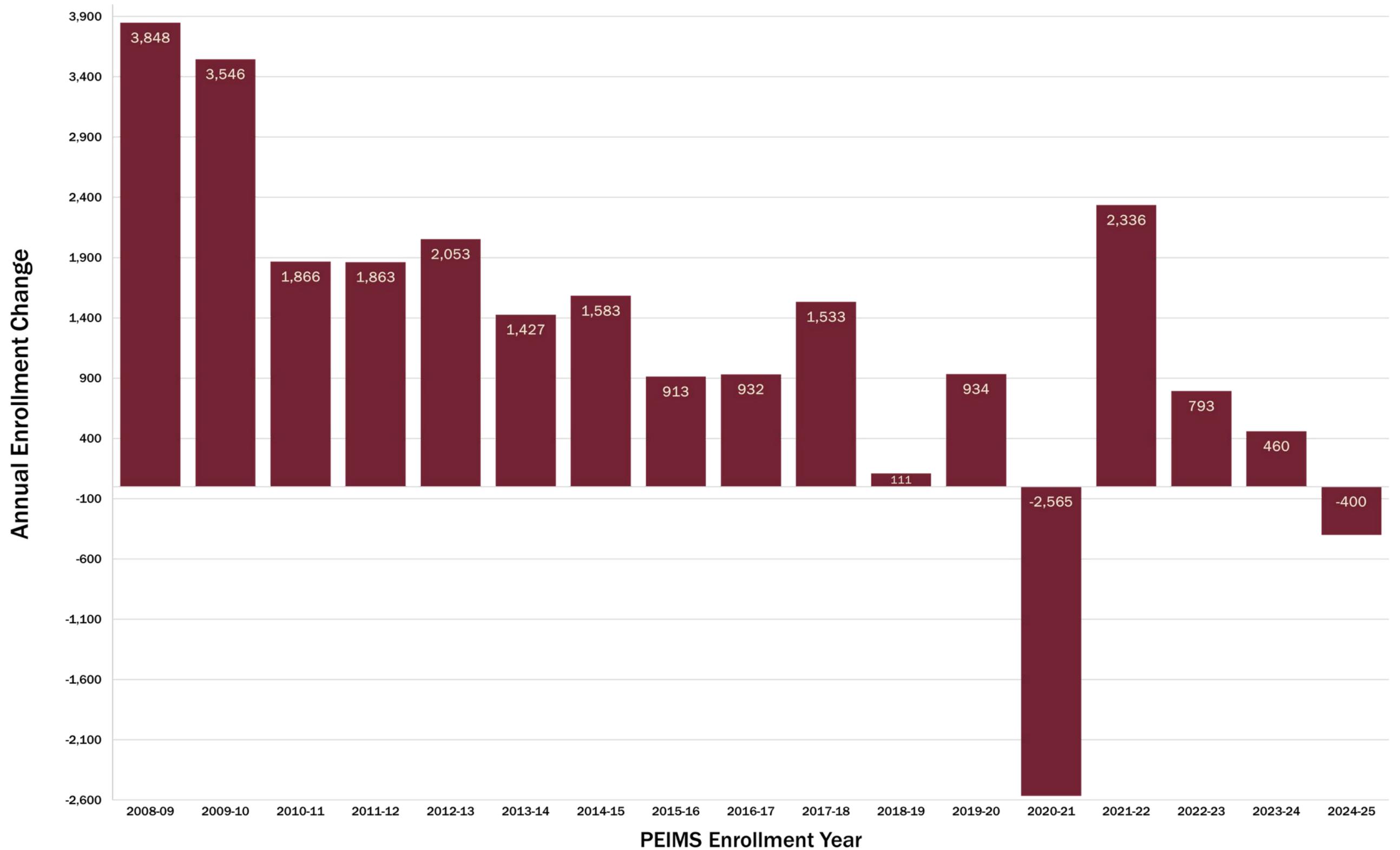
**1,958** student increase over five years

## Cy-Fair ISD Ten-Year Historical Enrollment

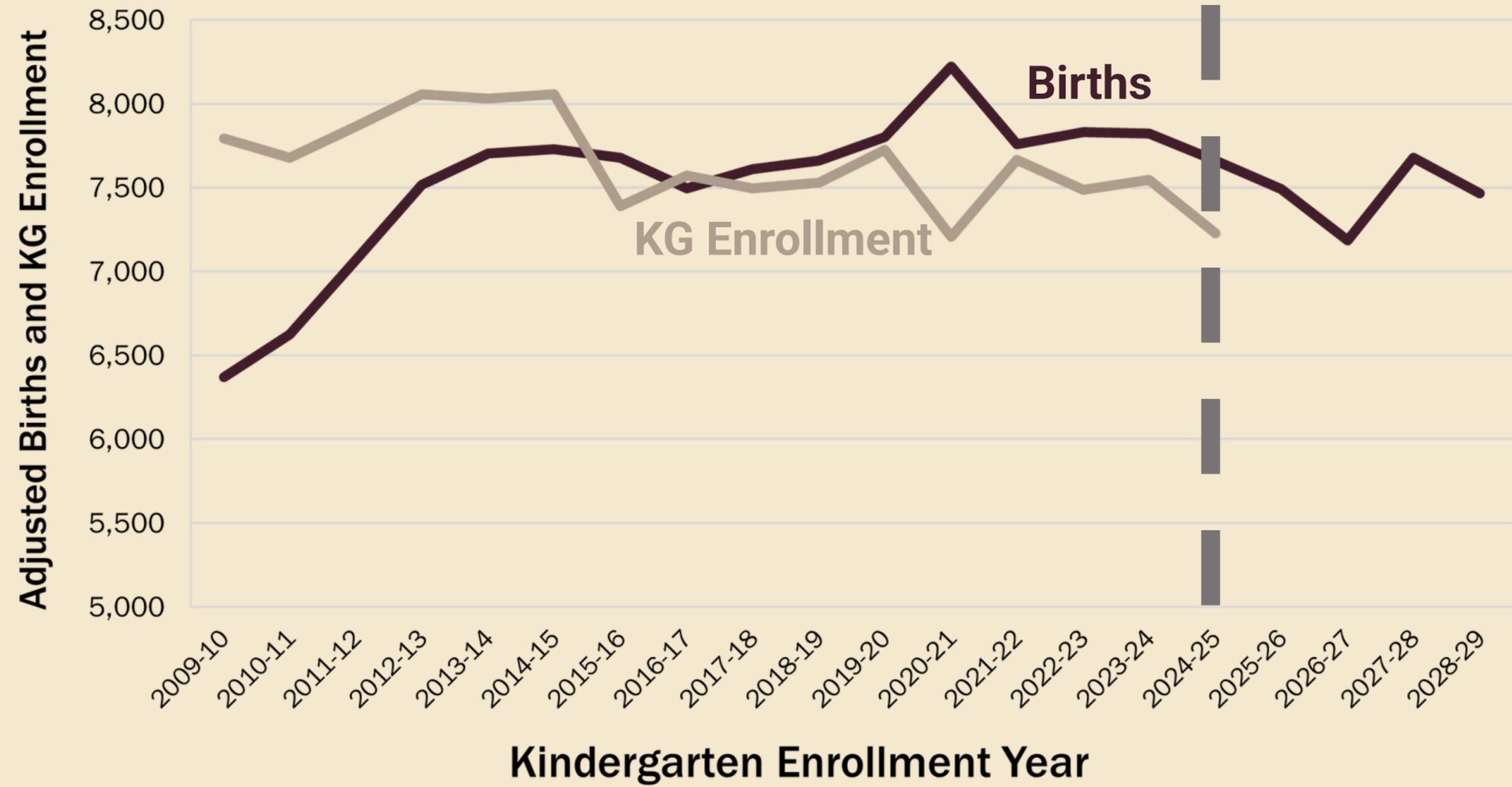


Sources: Texas Education Agency (TEA); CFISD Enrollment - October 25, 2024

# Historical Enrollment Change



# KG Enrollment vs. Births



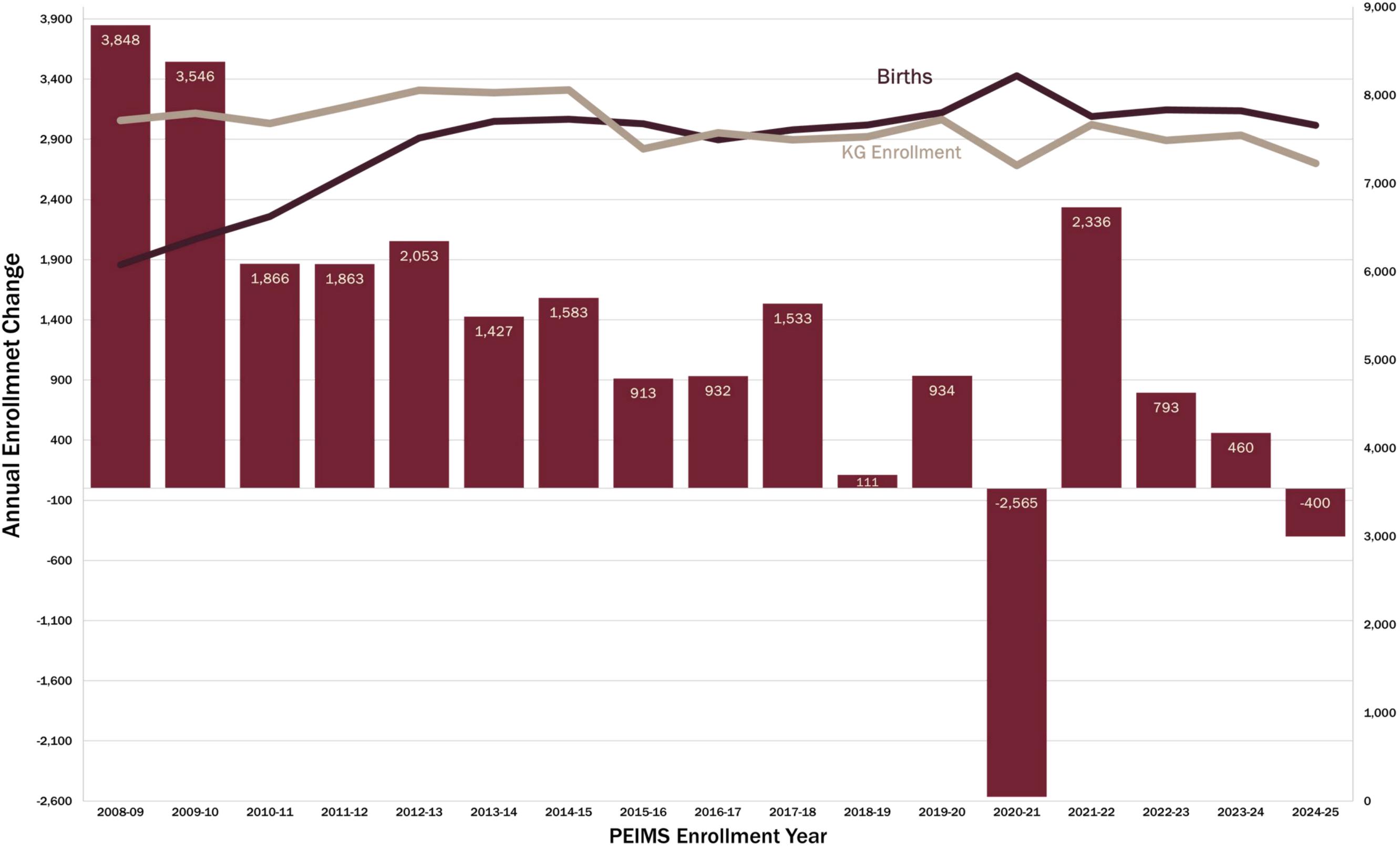
**Difference Between Two Lines Shows Immigration of Young Children After Birth**

**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

# Historical Enrollment Change with KG Enrollment + Births



# Demographic Study

## Components

Demographic Trends

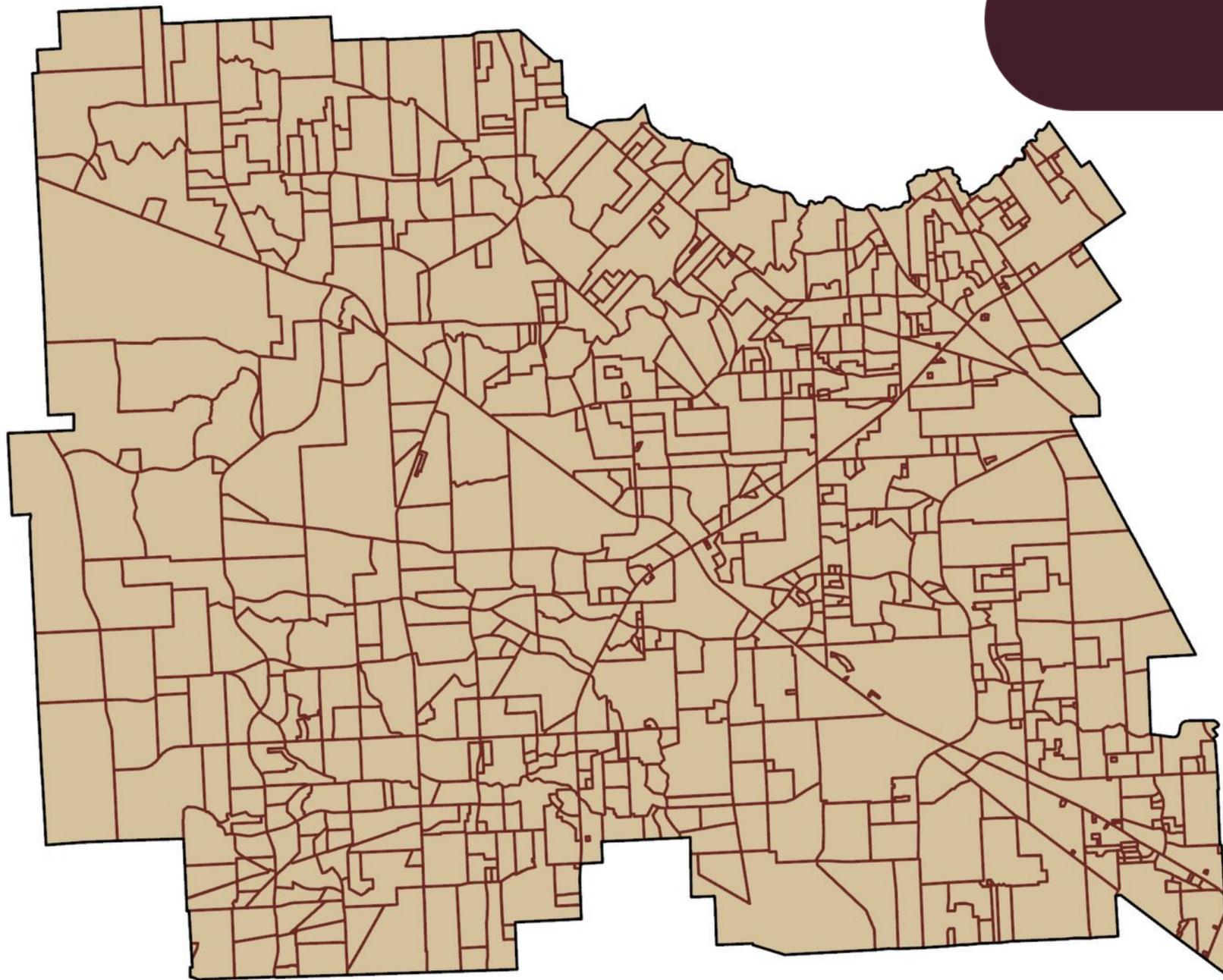
Past & Current Students

Economy and Housing

Student Projections



# Residential Codes

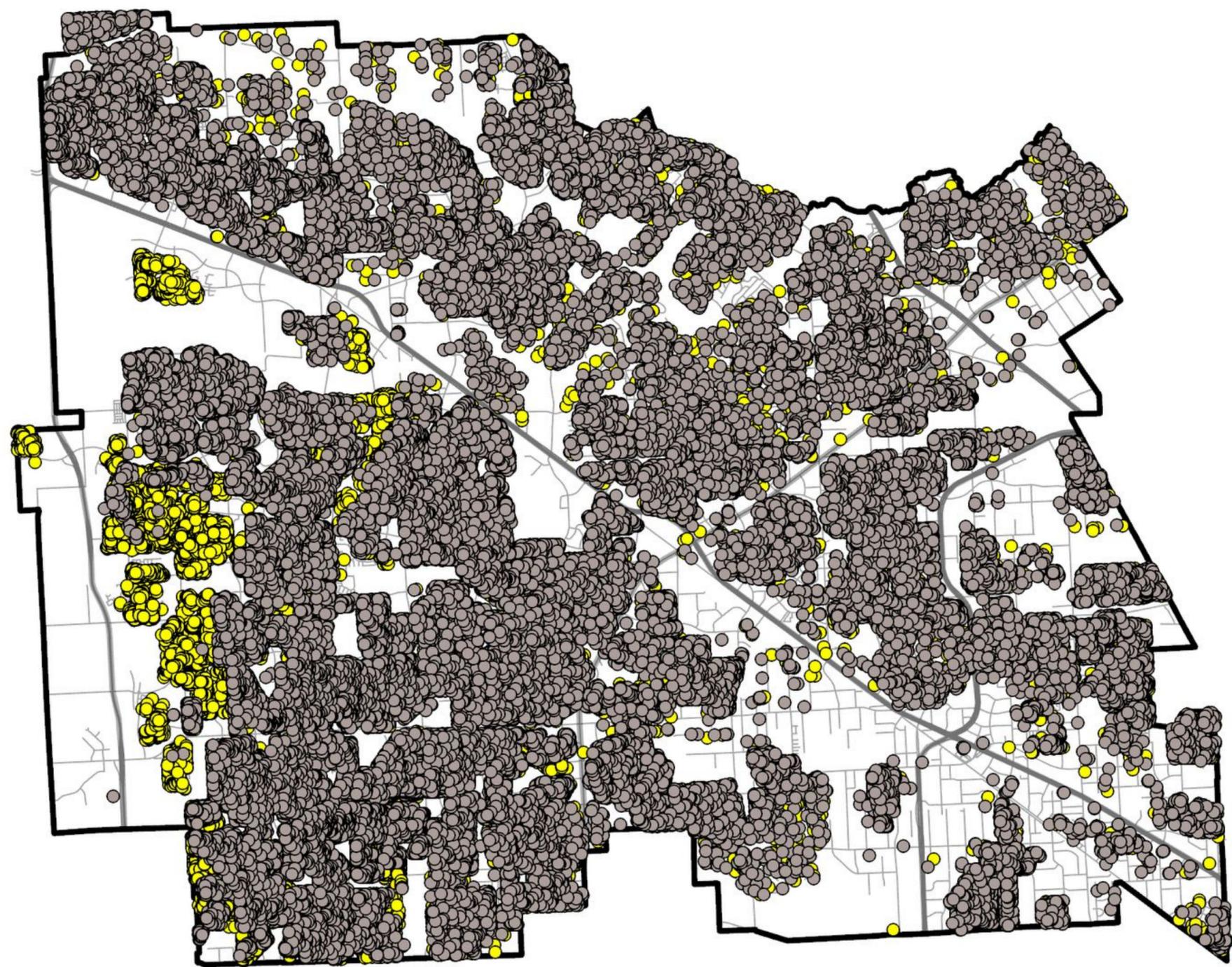


 Residential Codes

- Organizational scheme for all data
- Small divisions of the District containing one or more housing developments or parcels of land
- Created by CFISD and utilized by PASA



# Student Geocode



- 2019-20 Students
- 2024-25 Students

- Place each student on the map
  - 99% accuracy
  - Starting point for projections
- Yellow areas indicate homes where students live now, that did not exist in 2019-20, highlighting areas of growth.**

# 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	600	643	640	727	818	699	692	773	818	709
PK	3,251	3,407	3,563	3,417	3,598	2,974	3,780	4,170	4,107	4,160
KG	7,391	7,573	7,495	7,530	7,723	7,205	7,664	7,486	7,547	7,227
1	8,416	7,775	8,025	7,860	7,930	7,761	7,985	8,123	7,978	7,860
2	8,623	8,540	7,961	8,126	7,886	7,768	8,013	8,092	8,303	8,053
3	8,576	8,658	8,772	8,157	8,259	7,818	8,075	8,173	8,327	8,453
4	8,403	8,718	8,813	8,913	8,292	8,159	8,116	8,266	8,365	8,452
5	8,401	8,571	8,985	8,928	9,117	8,341	8,449	8,292	8,462	8,606
6	8,459	8,504	8,760	8,990	9,014	8,930	8,534	8,573	8,438	8,521
7	8,760	8,554	8,771	8,921	9,236	8,972	9,138	8,676	8,815	8,619
8	8,540	8,854	8,763	8,880	9,087	9,226	9,205	9,318	8,815	8,974
9	9,658	9,993	10,323	10,023	10,344	9,981	11,072	11,171	11,263	10,780
10	8,482	8,381	8,551	8,924	8,655	9,072	8,729	9,172	9,158	9,220
11	8,390	8,482	8,582	8,673	9,030	8,918	9,050	8,997	9,361	9,275
12	7,986	8,215	8,397	8,443	8,457	9,057	8,715	8,728	8,713	9,148
TOTAL	113,936	114,868	116,401	116,512	117,446	114,881	117,217	118,010	118,470	118,057

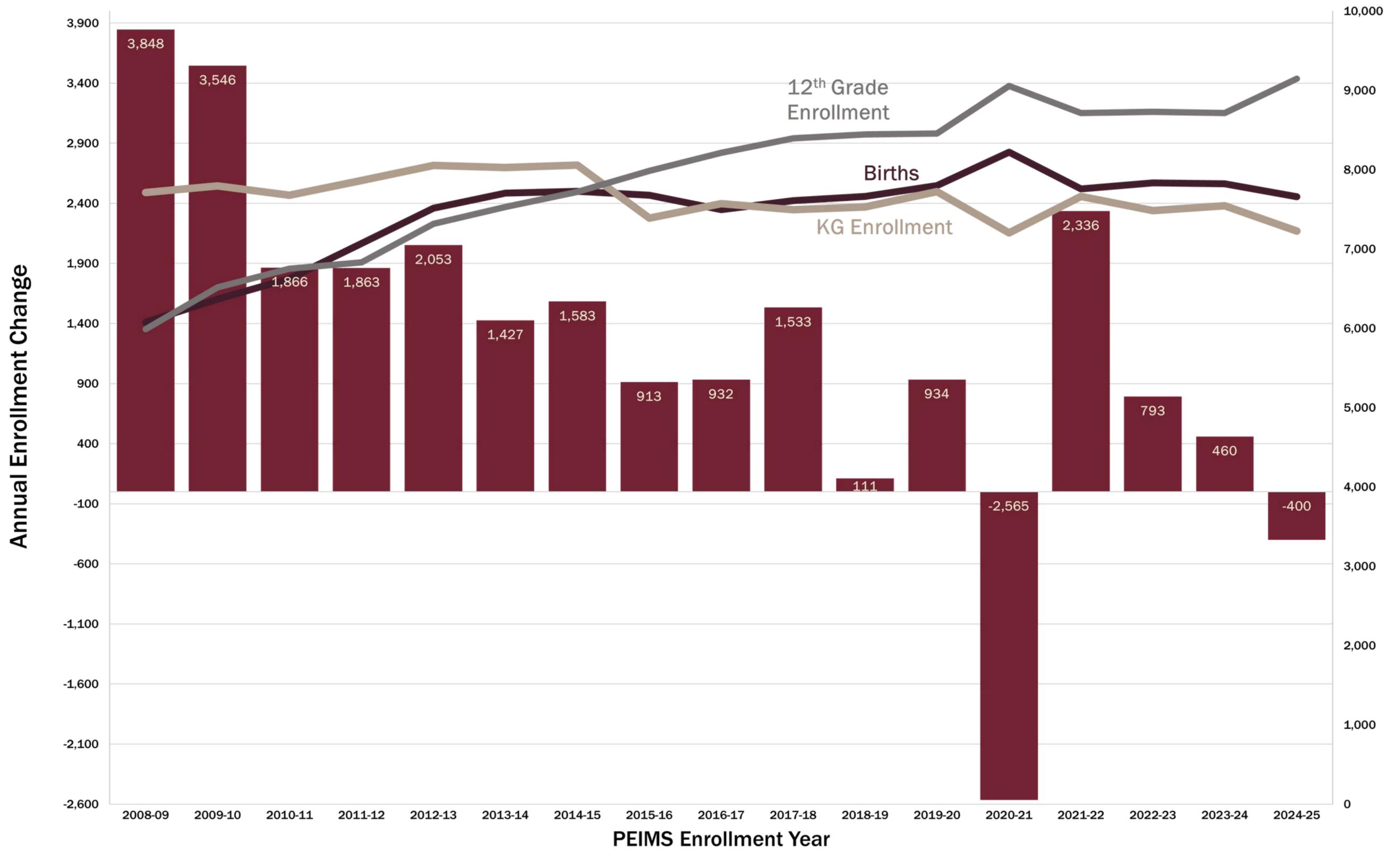
Legend: smallest class (lightest color) to largest class (darkest color)

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.

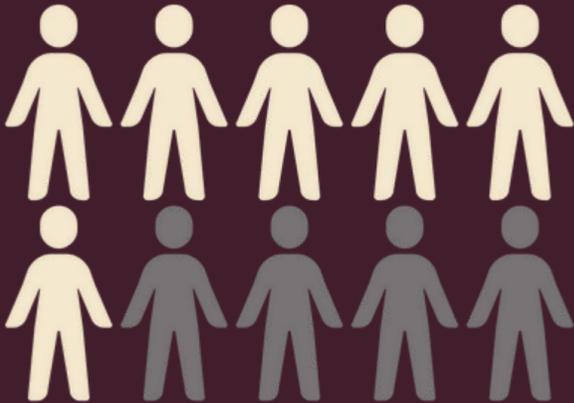
# Historical Enrollment Change with 12th Grade and KG Enrollment & Births



# Students Per Home

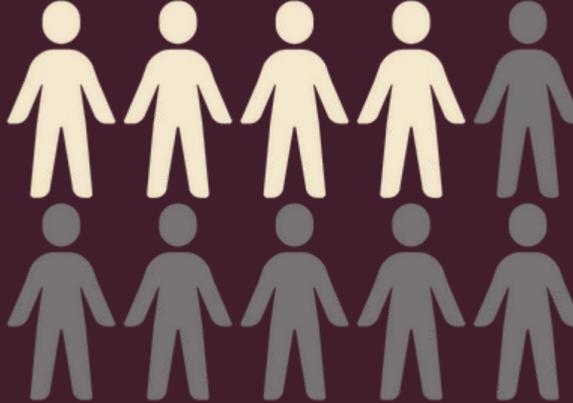
0.56

Single-Family



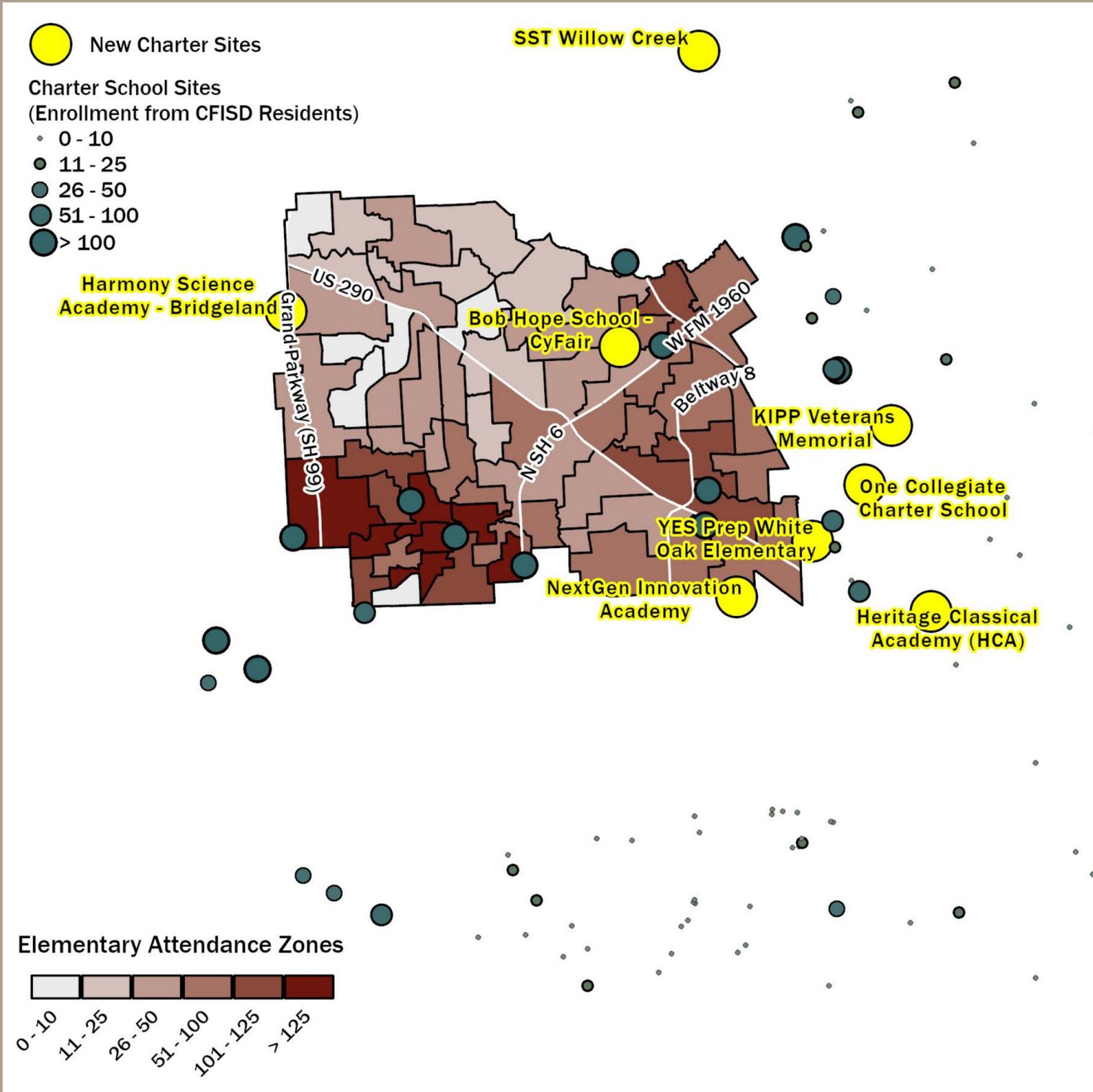
0.37

Multi-Family



# Alternative Educational Opportunities

## New Charter Impacts



### Future charter campuses include:

- Bob Hope School
- Harmony Science Academy - Bridgeland
- YES Prep White Oak Elementary
- Heritage Classical Academy
- Kipp Veterans Memorial
- NextGen Innovation Academy
- One Collegiate Charter School
- SST Willow Creek



**~1,800** more students could leave for charters over five years

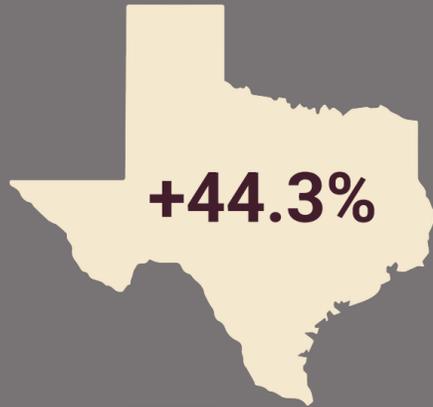
# Alternative Educational Opportunities

Cy-Fair ISD 2023-24

## Summary of Enrollment

<b>Resident Students</b>	<b>127,550</b>	
Attending Charter Schools	-5,233	(4.1%)
Attending Private Schools	-3,064	(2.4%)
Attending Other ISDs	-944	(0.7%)
Attending Virtual Academies	-725	(0.6%)
Attending and Residing in District	=117,584	(92.2%)
Transfers into District	+886	
<b>PEIMS Enrollment - 10/27/2023</b>	<b>118,470</b>	

Since Fall 2017:



Statewide increase in charter school enrollment



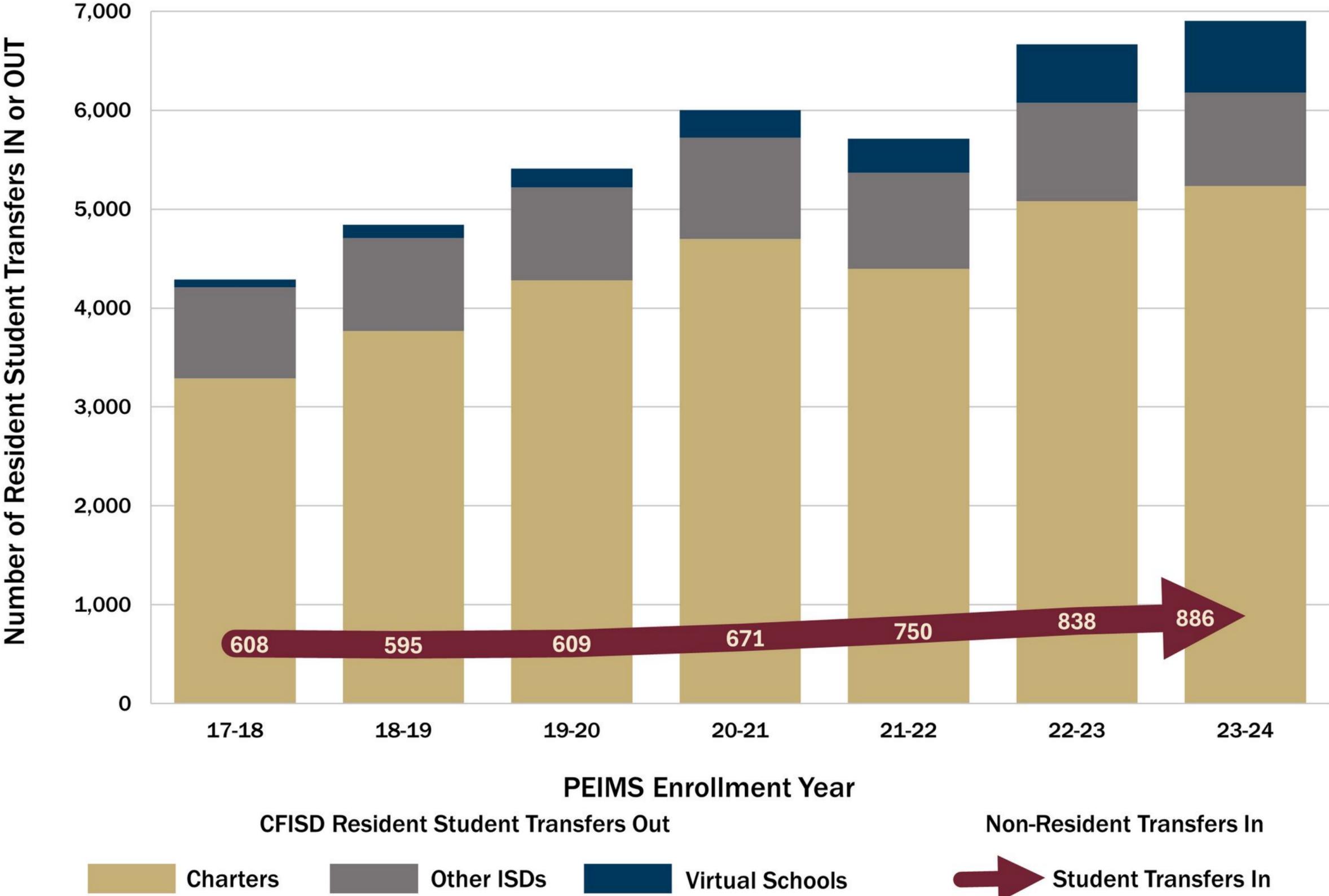
CFISD increase in students transferring to charter schools

Sources: TEA Transfer Reports, PASA Interviews with Schools

92.2% of CFISD Resident Students Attend CFISD

# Alternative Educational Opportunities

## Public School Impact of Students Transferring Into and Out of CFISD

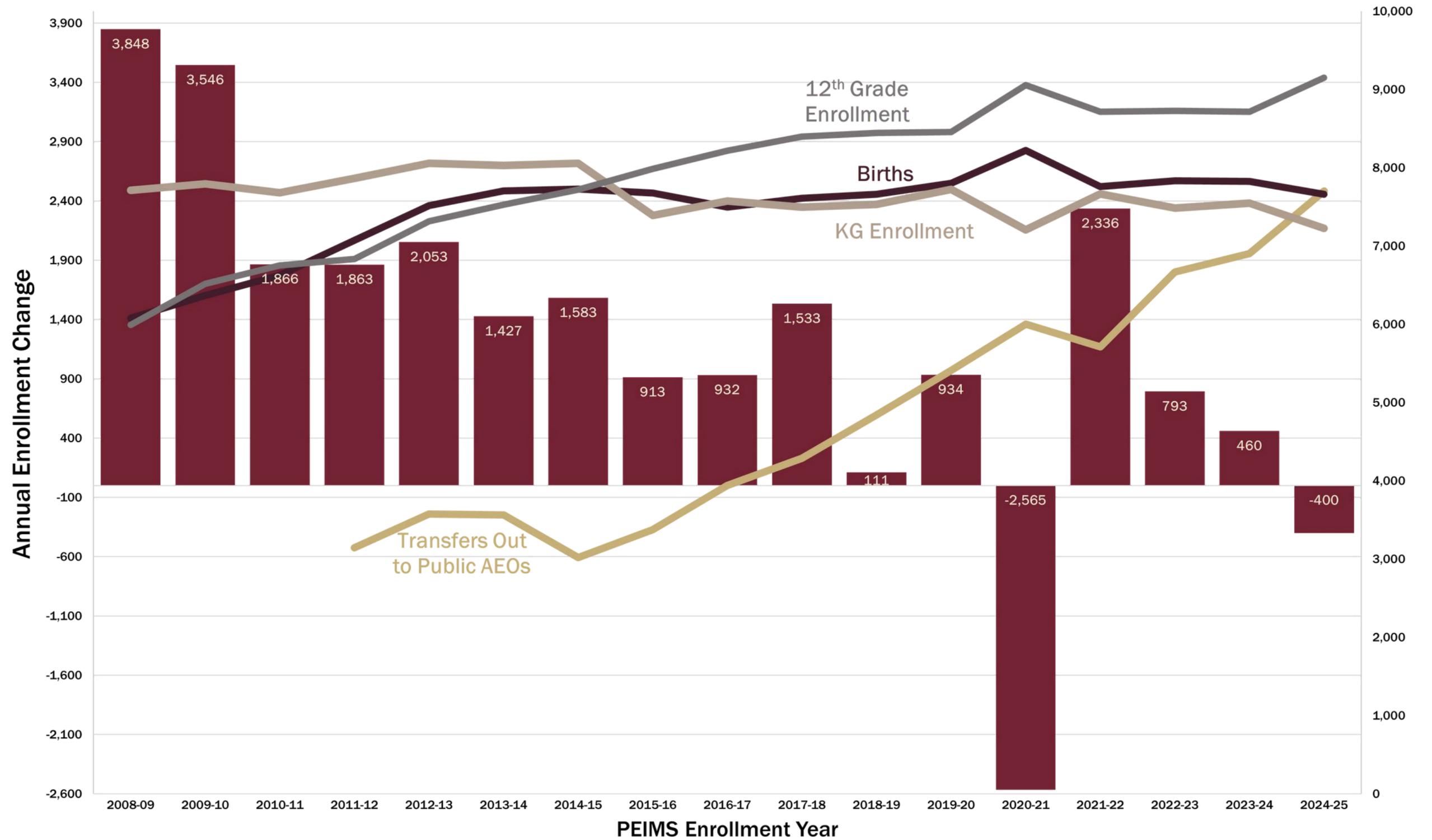


Source: Texas Education Agency (TEA)

# Historical Enrollment Change

## 12th Grade and KG Enrollment & Births

### + Transfers Out to Public AEOs



# Demographic Study

## Components

Demographic Trends

Past & Current Students

Economy and Housing

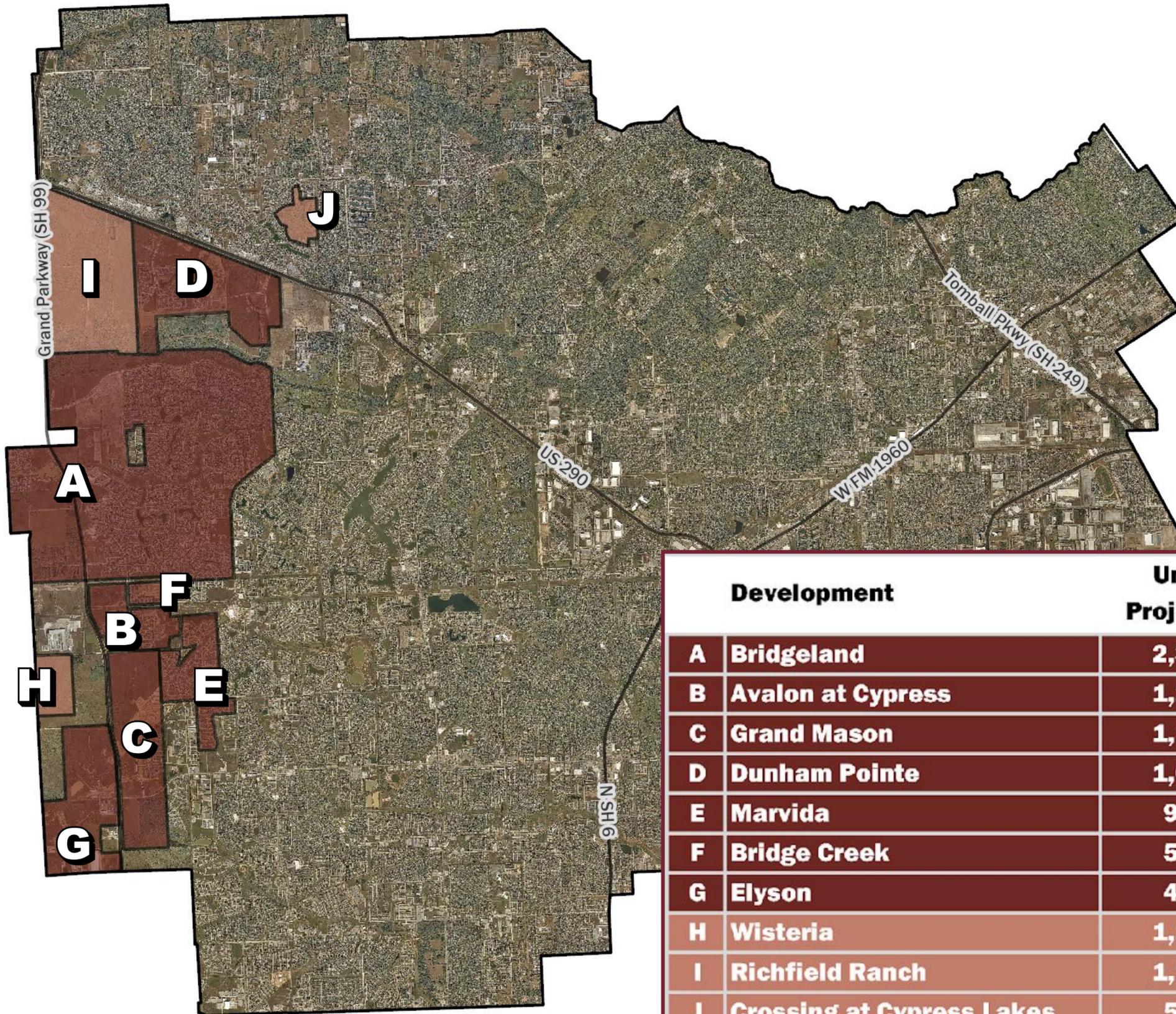
Student Projections





# Impactful Single-Family Developments

Ten-Year Projected New Occupancies



	<b>Development</b>	<b>Units Projected</b>	<b>Currently Occupied</b>	<b>Status</b>
<b>A</b>	<b>Bridgeland</b>	<b>2,312</b>	<b>7,261</b>	<b>Developing</b>
<b>B</b>	<b>Avalon at Cypress</b>	<b>1,232</b>	<b>409</b>	<b>Developing</b>
<b>C</b>	<b>Grand Mason</b>	<b>1,137</b>	<b>391</b>	<b>Developing</b>
<b>D</b>	<b>Dunham Pointe</b>	<b>1,000</b>	<b>518</b>	<b>Developing</b>
<b>E</b>	<b>Marvida</b>	<b>934</b>	<b>1,738</b>	<b>Developing</b>
<b>F</b>	<b>Bridge Creek</b>	<b>528</b>	<b>485</b>	<b>Developing</b>
<b>G</b>	<b>Elyson</b>	<b>459</b>	<b>1</b>	<b>Developing</b>
<b>H</b>	<b>Wisteria</b>	<b>1,250</b>	<b>0</b>	<b>Planned</b>
<b>I</b>	<b>Richfield Ranch</b>	<b>1,100</b>	<b>0</b>	<b>Planned</b>
<b>J</b>	<b>Crossing at Cypress Lakes</b>	<b>501</b>	<b>0</b>	<b>Planned</b>

# Largest Single-Family Subdivisions

ACTIVE: Ten-Year Projected New Occupancies

2,312

## units Bridgeland

- Approximately 76% built-out
- >7,250 homes occupied fall 2024
- >2,300 projected primarily west of Mason Road
- New single-family section incorporated into Bridgeland, west of 99
- Buildout projected by late 2032

1,232

## units Avalon at Cypress

- Approximately 25% built-out
- >400 homes occupied fall 2024
- >1,200 projected including BTR section - Yardly
- Buildout projected by late 2029

1,137

## units Grand Mason

- Approximately 26% built-out
- Nearly 400 homes occupied fall 2024
- >1,100 projected
- Buildout projected by late 2029

1,000

## units Dunham Pointe

- Approximately 34% built-out
- >500 homes occupied fall 2024
- Approximately 1,000 projected
- Buildout projected by late 2028
- Considerable acreage is planned for commercial, mixed-use, office, and multi-family, which could be modified in the future.

934

## units Marvida

- Approximately 65% built-out
- >1,700 homes occupied fall 2024
- >900 projected including BTR section - Willow
- Buildout projected by late 2027

# Largest Single-Family Subdivisions

PLANNED / PROBABLE: Ten-Year Projected New Occupancies

**1,250  
units**

## Wisteria

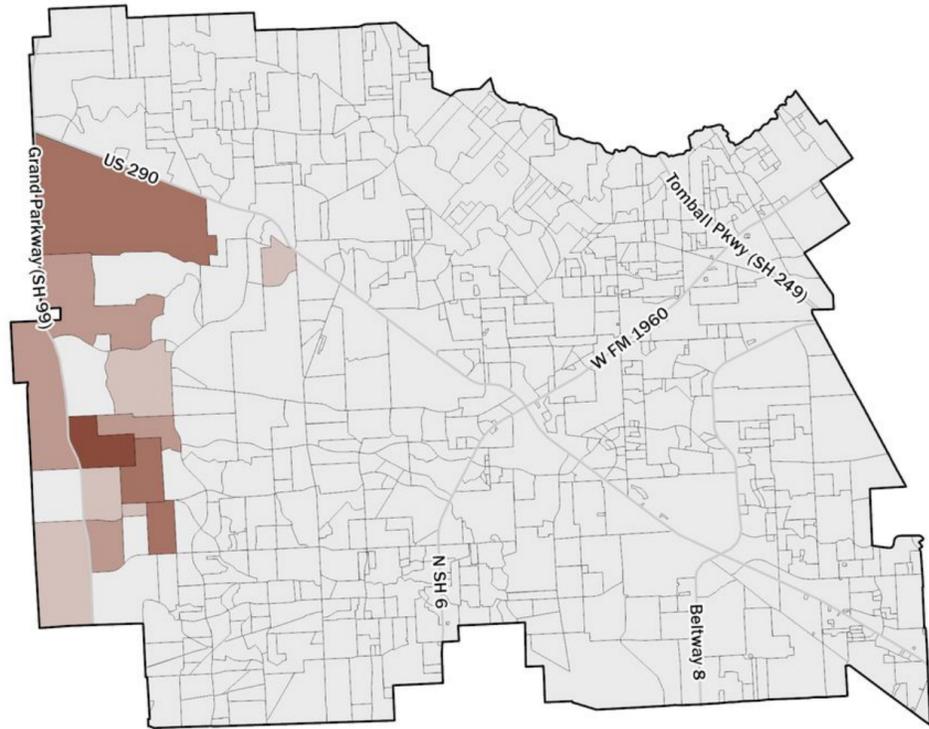
- First sections platted in Cy-Fair and Katy ISD along Peek Road, west of 99
- No site work as of fall 2024
- >1,200 projected in CFISD
- First occupancies by late 2026

**1,100  
units**

## Richfield Ranch

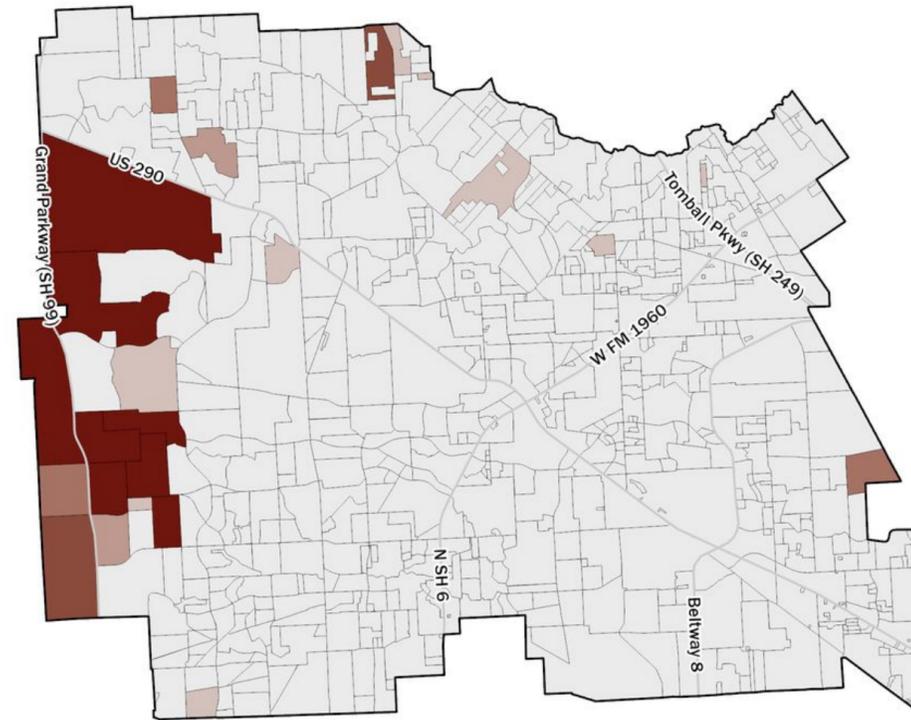
- No known plans, but likely single-family in addition to commercial and multi-family development
- Development potential increases as existing subdivisions build out
- Approximately 1,100 projected
- Projections increase mid-planning period

# Projected New Single-Family Occupancies by Residential Code



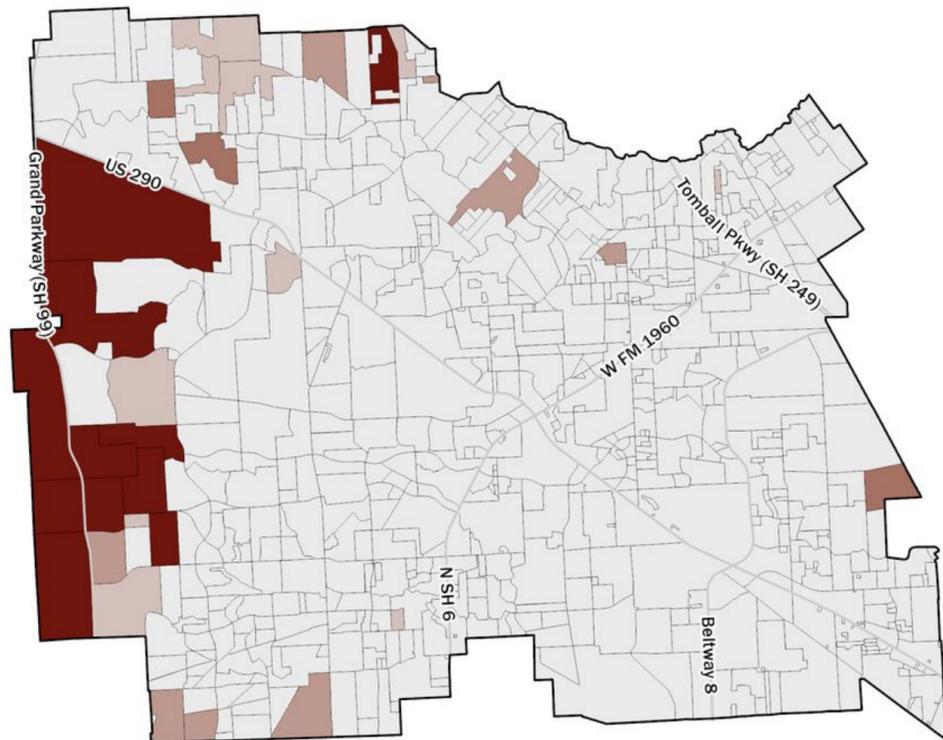
## Year 1

Oct 2024 through Oct 2025



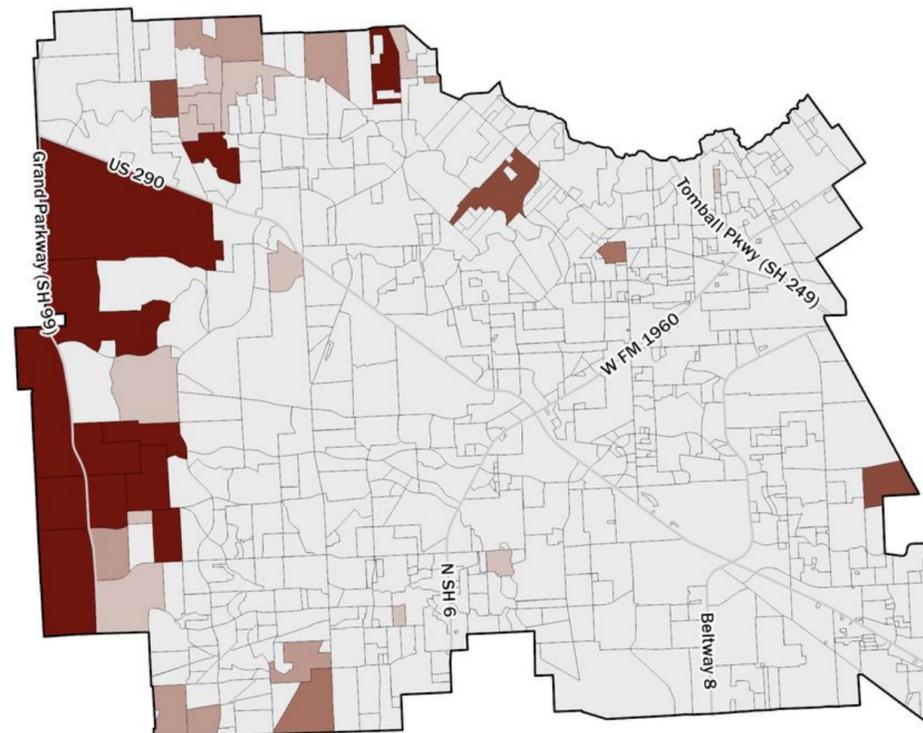
## Years 1-4

Oct 2024 through Oct 2028



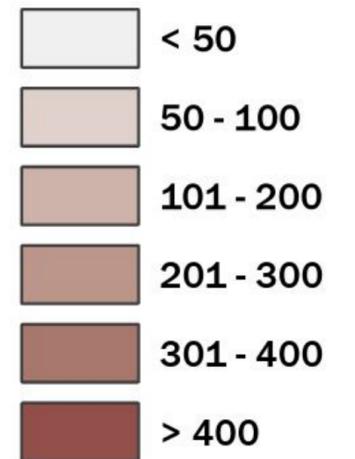
## Years 1-7

Oct 2024 through Oct 2031



## Years 1-10

Oct 2024 through Oct 2034



# Multi-Family & Rental Projections

## Rental Projects

### Currently Leasing-up

- Alexan Cypress Creek
- Allora Bear Creek
- Allora Parkland
- Alta Cypress Springs
- Birchway Perry Road
- Lively at Cypress Creek
- Millers at Elyson BTR
- San Palmas
- Sita Ram Estates
- Skyview Flats
- Willow at Marvida BTR
- Wingspan BTR
- Yardly Cypress BTR

**17,187**

multi-family  
occupancies  
projected

**1,193**

build-to-rent  
occupancies  
projected

**31.5%**

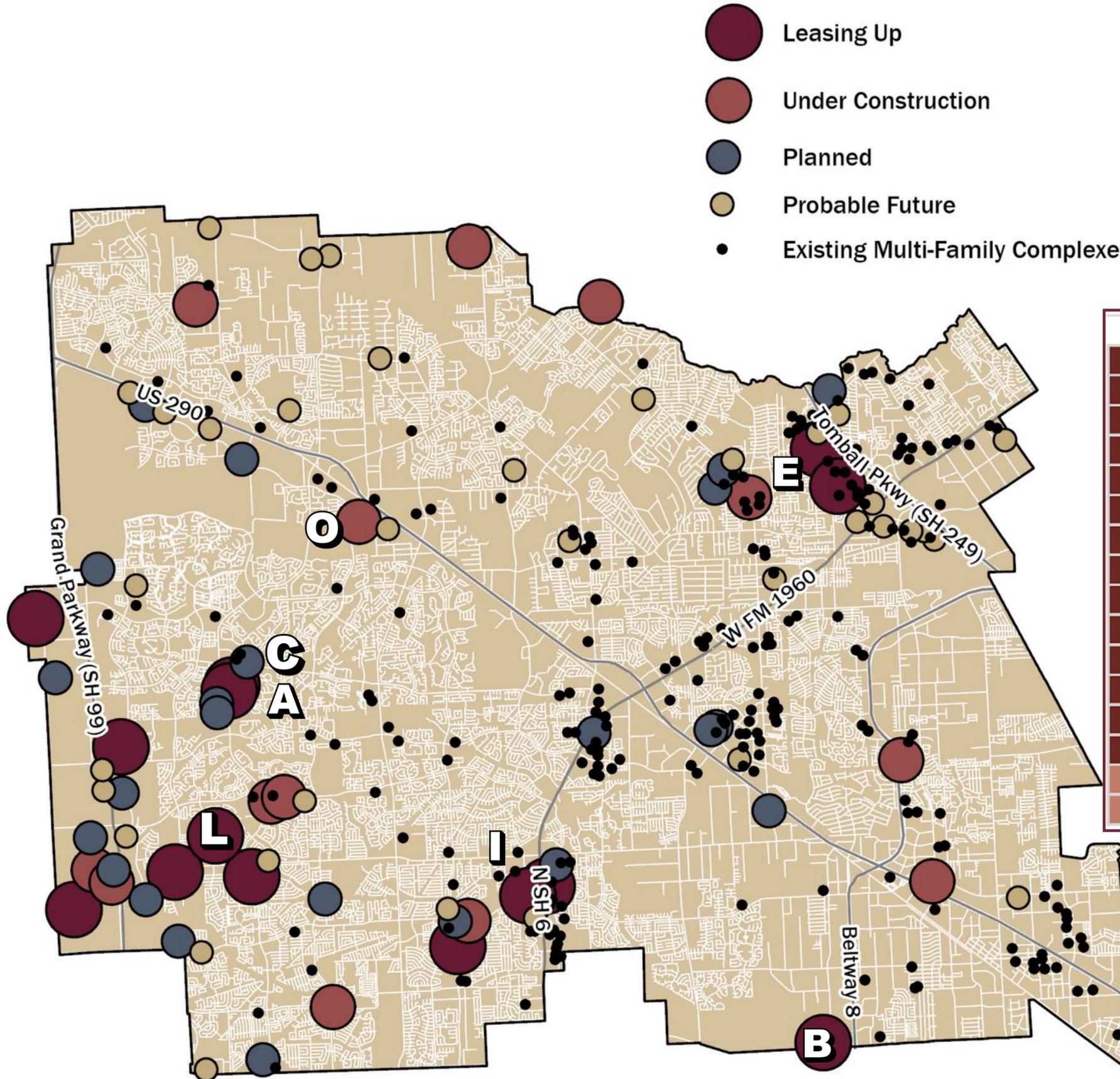
of total projected  
students from  
new housing

**26**

projects in  
active  
development

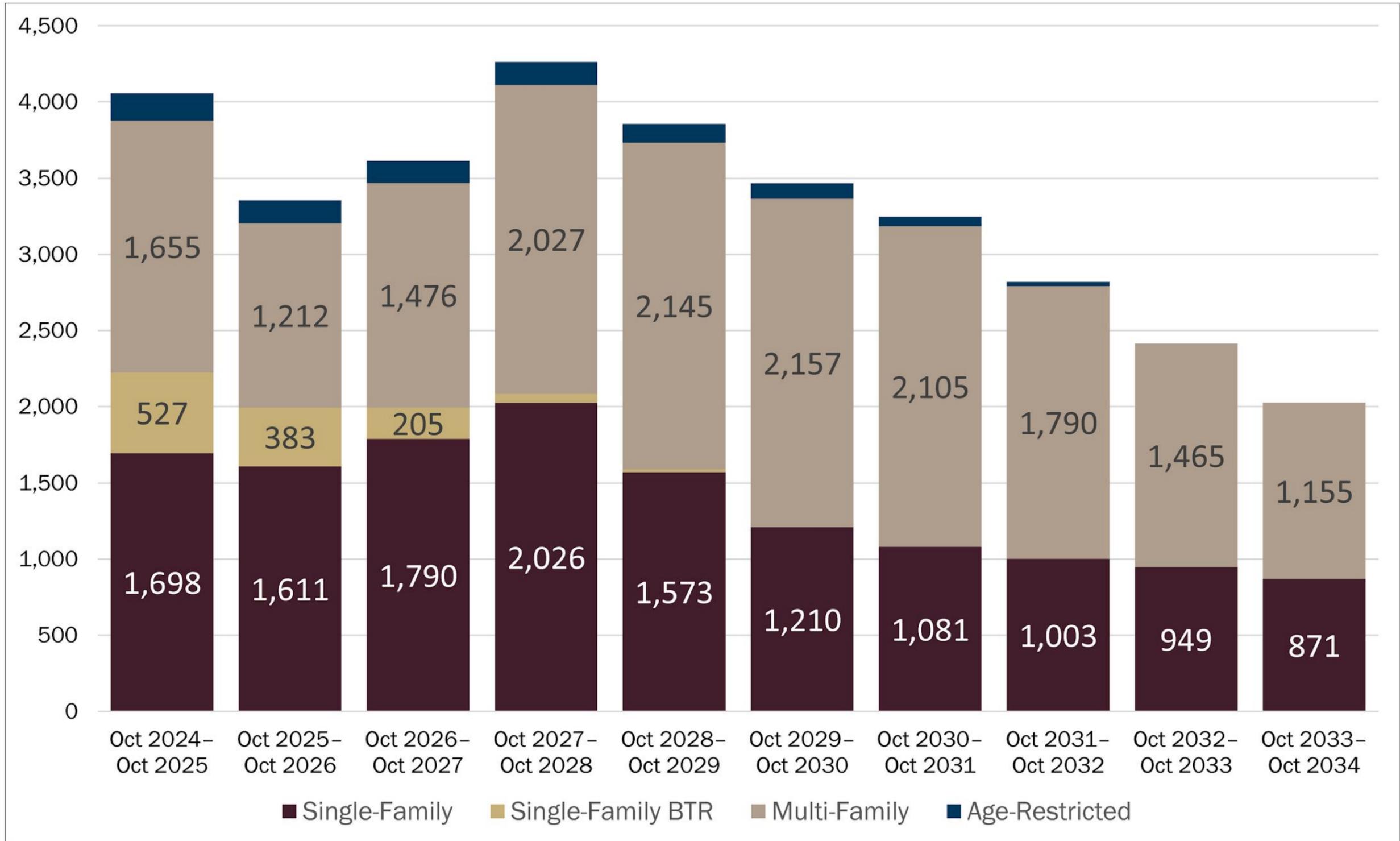
# Projected New Multi-Family & Rental Development

Complexes with >350 units labeled



Development	Status	Units
A Alexan Cypress Creek	Leasing Up	351
B Allora Bear Creek	Leasing Up	324
C Allora Parkland	Leasing Up	378
D Alta Cypress Springs	Leasing Up	330
E Birchway Perry Road	Leasing Up	462
F Lively at Cypress Creek	Leasing Up	324
G Millers at Elyson - BTR	Leasing Up	170
H PhanlaLLC Tract Potential MF	Leasing Up	91
I San Palmas	Leasing Up	370
J Sita Ram Estates	Leasing Up	282
K Skyview Flats	Leasing Up	312
L Willow at Marvida - BTR	Leasing Up	368
M Wingspan - BTR	Leasing Up	263
N Yardly Cypress - BTR	Leasing Up	240
O Asher at Towne Lake	Developing	350
P Elyson Multi-Family	Developing	300

# Housing Projections by Year of Occupancy



# Ten-Year Total Projected New Occupancies

**15,005**

45.3% of Total

SINGLE-FAMILY (INCLUDING  
BTR)

**17,187**

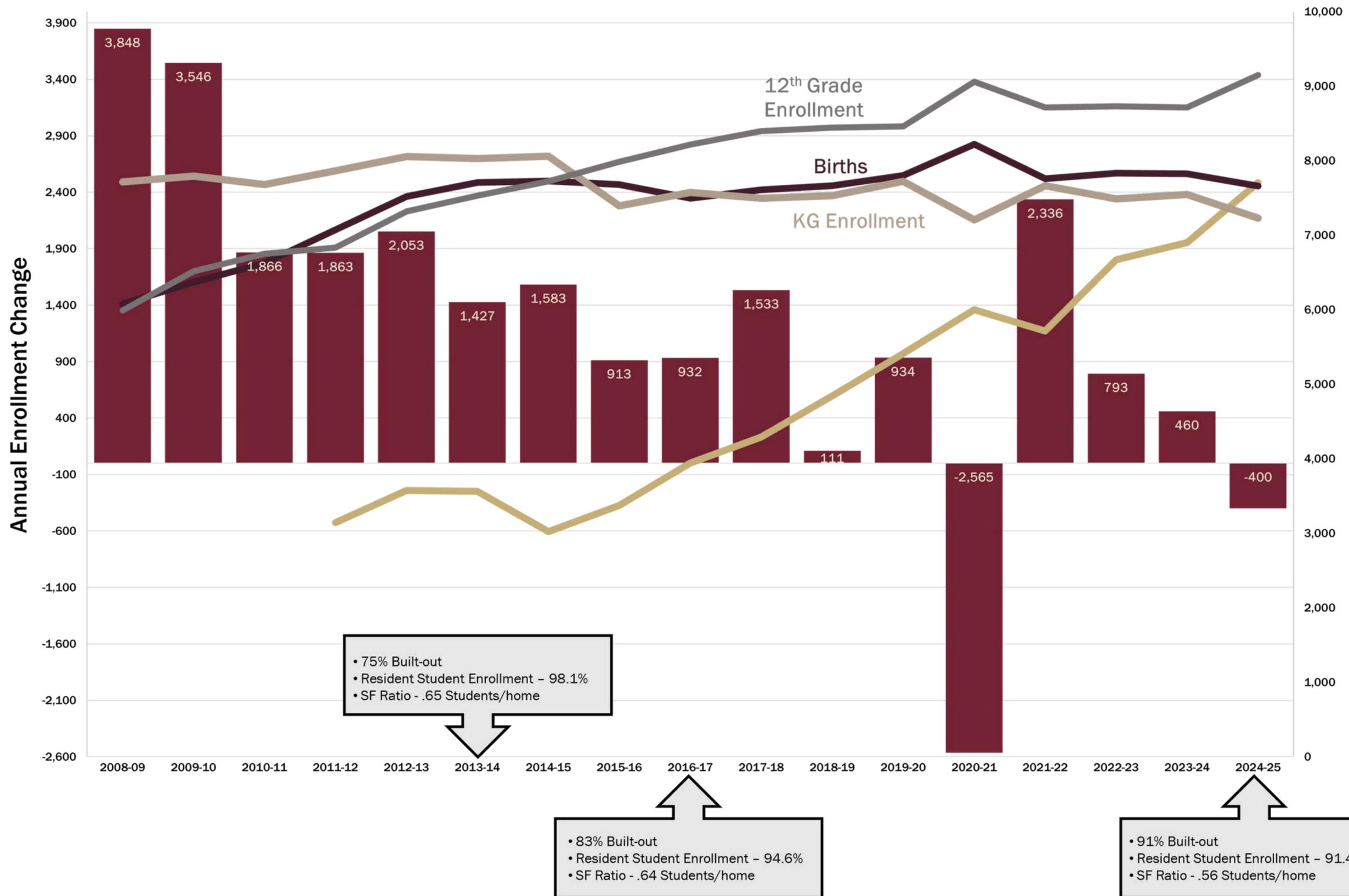
51.9% of Total

MULTI-FAMILY

**33,120**

TOTAL PROJECTED NEW HOUSING OCCUPANCIES

# Historical Enrollment Change



# Demographic Study

## Components

Demographic Trends

Past & Current Students

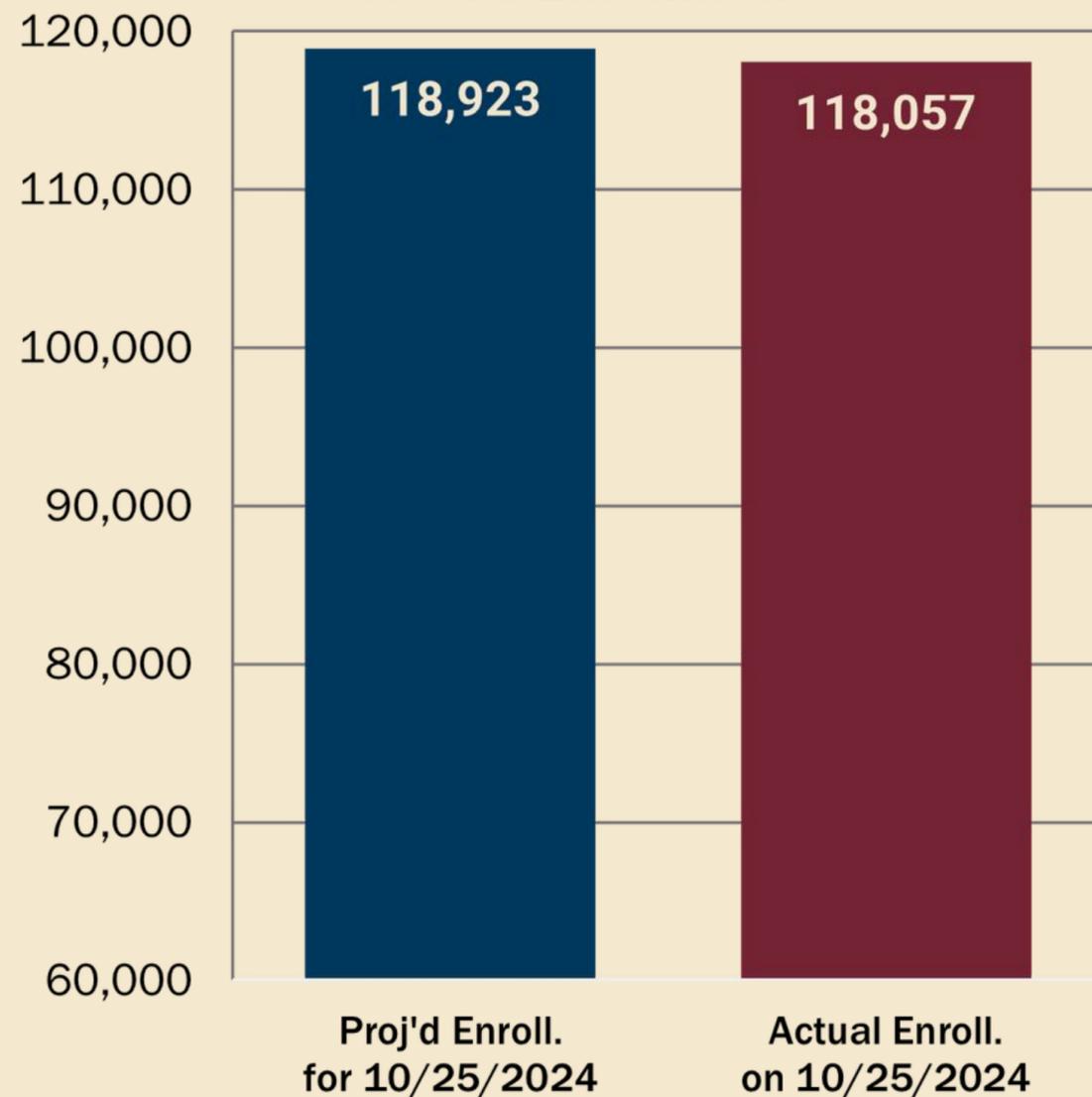
Economy and Housing

Student Projections



# What Has Changed Since Last Study?

## Projected Enrollment compared to Actual Enrollment



Sources: PASA 2023-24 Demographic Study;  
District Enrollment - October 25, 2024



### Housing

- New housing was built as projected
- Fewer young students as a proportion of total students in new construction
- Existing neighborhoods are declining faster in student population



### Births and KG

- Births to mothers in CFISD declined
- KG class smaller than last year, only partially due to fewer births



### Alternative Educational Opportunities

- Approximately 7,000 CFISD residents attend other public education schools
- This is growing by 400-500 students per year



### Intangible Trends

- Anti-traditional schooling sentiment
- Anecdotal suggestions of increasing trends in homeschools and micro-schools
- Pending voucher legislation this spring

# Student Projection Factors

## Birth Rates

Births have been declining in recent years, but a recent small increase will yield slightly larger 2027-28 KG class



## Incoming KG Class Size

KG class size smaller for two of the past three years; never returned to pre-Covid size



## Regeneration

Existing (built-out) neighborhoods on the whole are losing students as fewer students move in than move out/graduate



## Aging of Current Students

Large cohort has been aging through CFISD grades; currently in High School grades



## Factors Impacting Future Enrollment

## New Housing Construction

Drives majority of growth, adding 1,700 students per year in early years, decreasing to 800 students per year as CFISD nears build-out



## Alternative Educational Opportunities

New charter schools opening soon and recently opened schools that continue to add grade levels are projected to pull localized pockets of students from CFISD

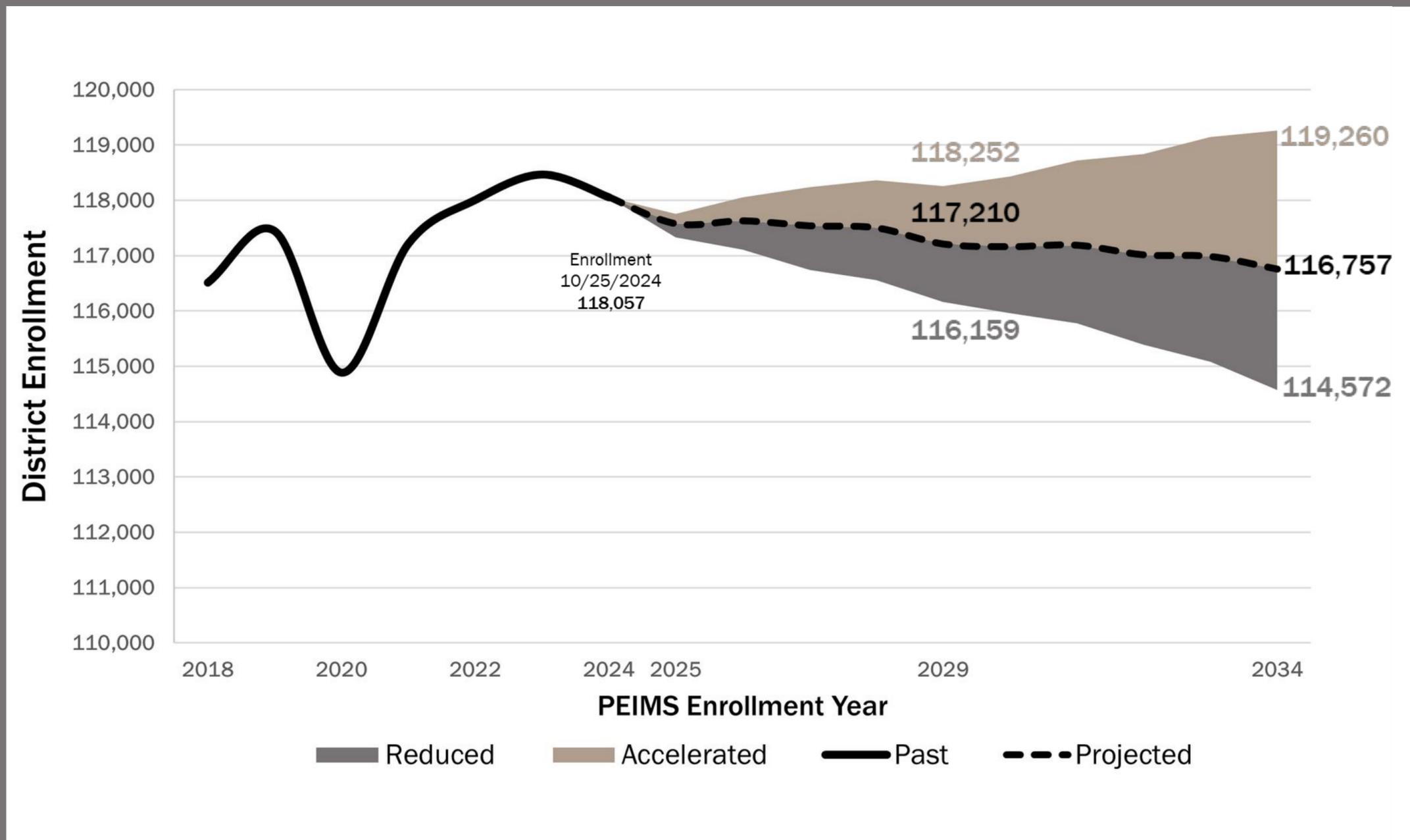


# Enrollment Forecast

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

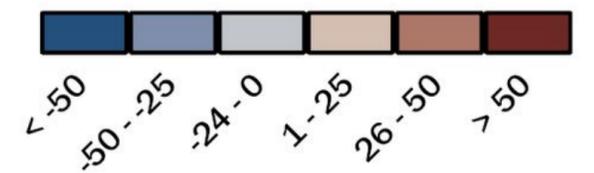
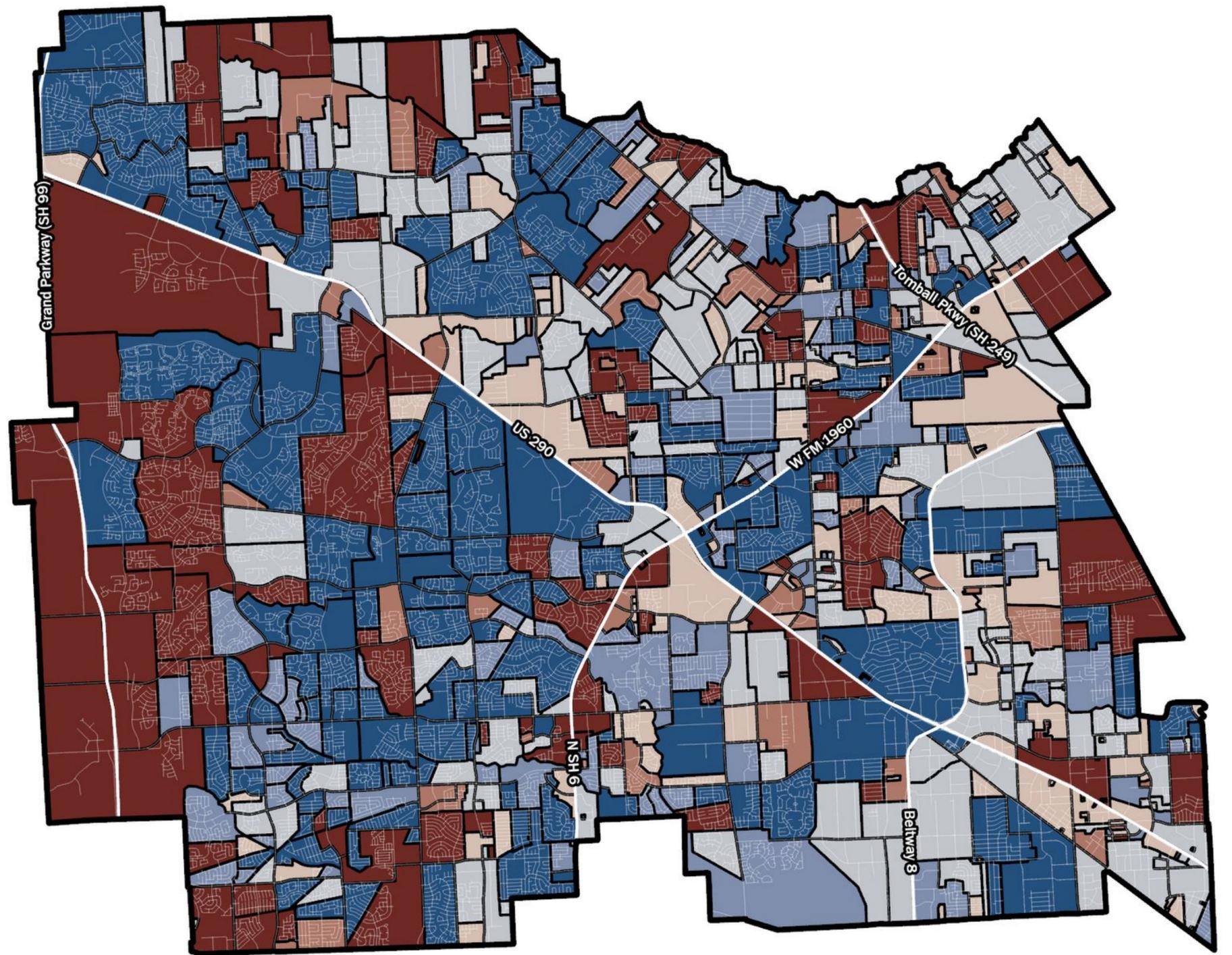
Reduced and Accelerated Scenarios are also feasible, assuming changing circumstances



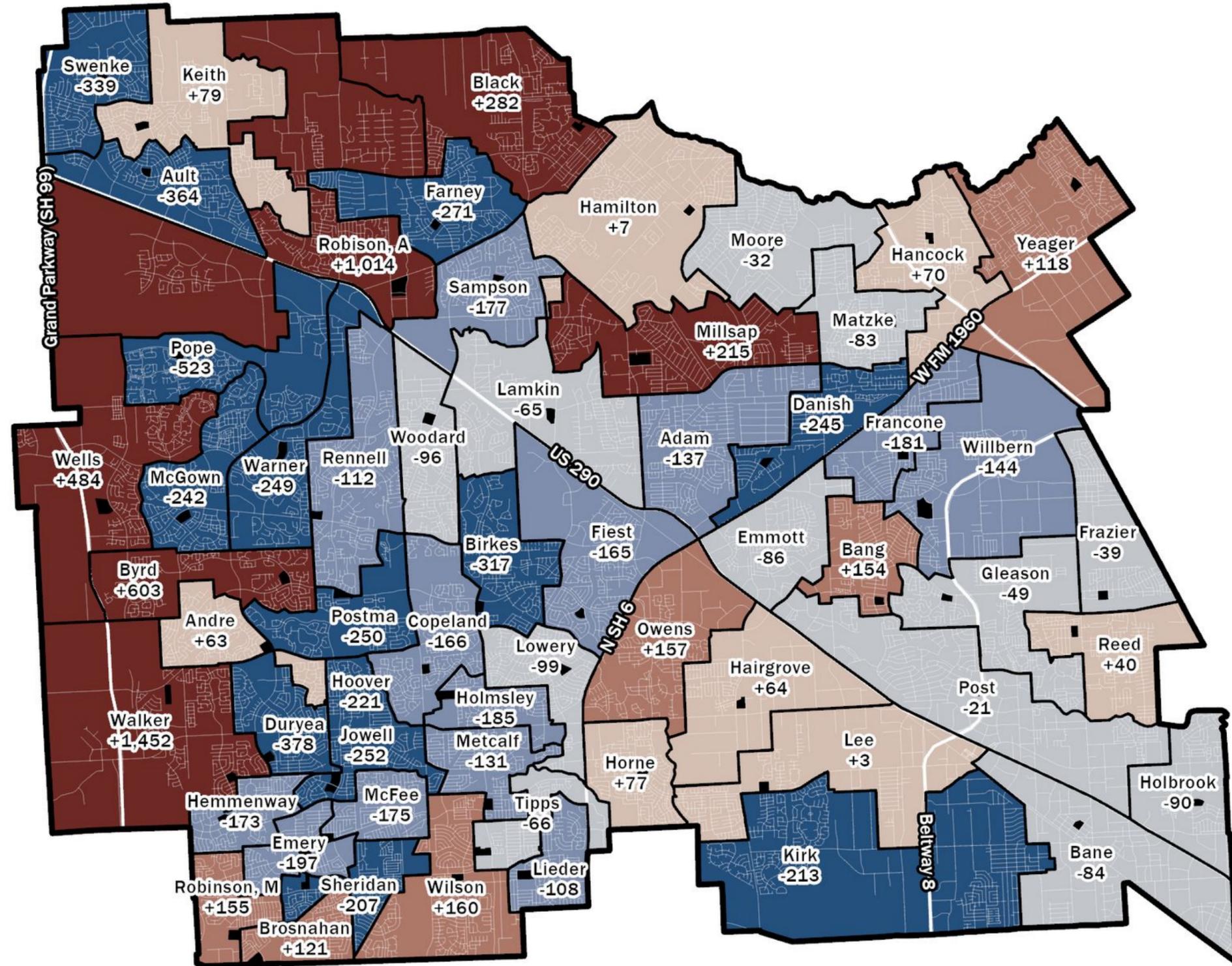
The Accelerated and Reduced Enrollment Scenarios account for potential changes in factors affecting enrollment, such as fluctuations in mortgage rates, housing construction, new charter school plans, birth rates, and resulting kindergarten class sizes.

# Projected Change in EE-12th Grade Resident Students by Res Code

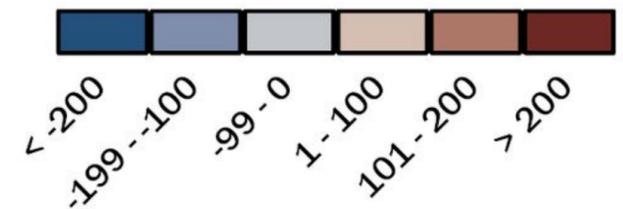
Fall 2013 - Fall 2034



# Resident Elementary School Students



Elementary School Sites



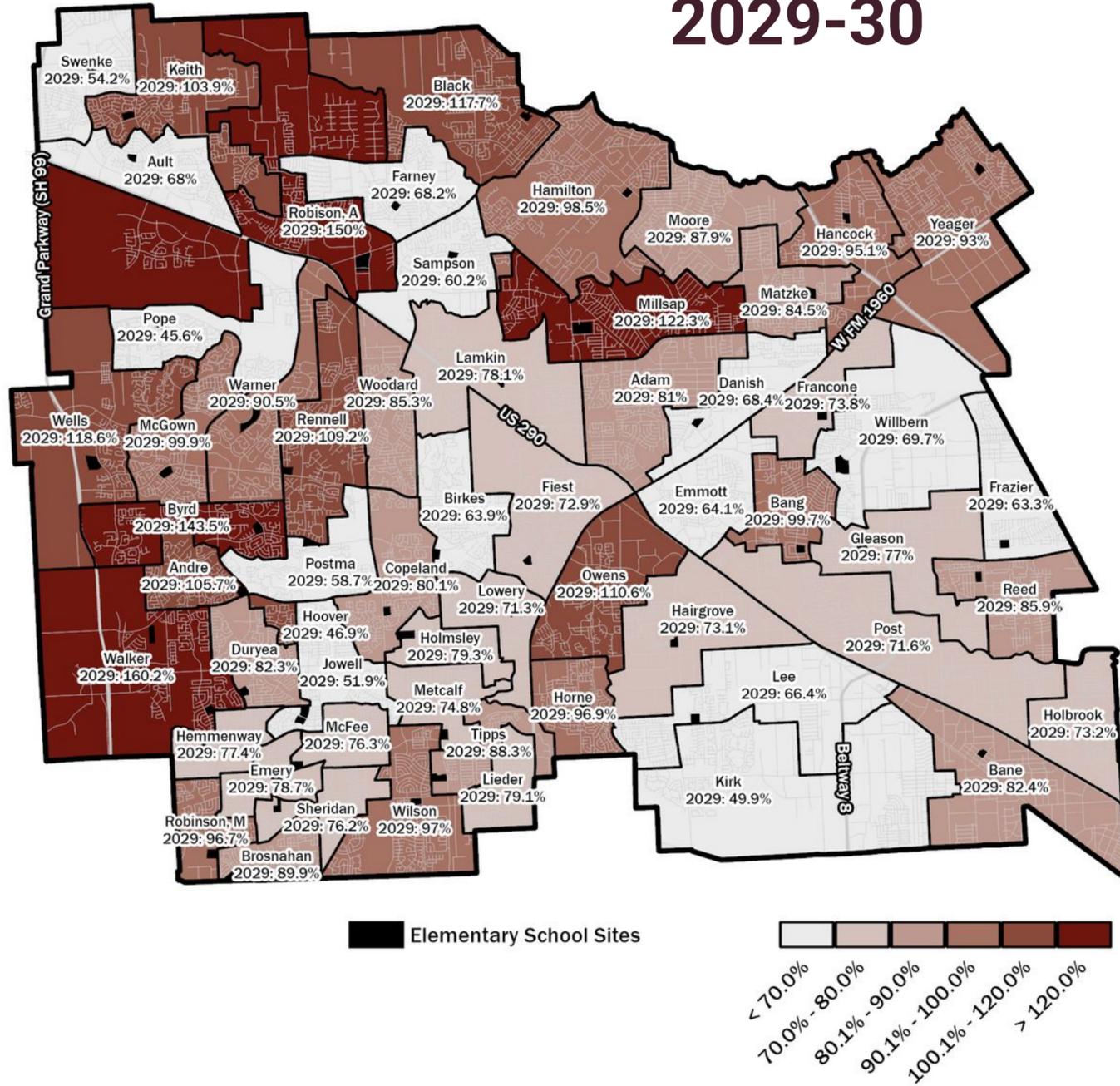
Ten-Year Enrollment Forecast

Projected Change  
by Attendance  
Zone  
Fall 2024 - Fall 2034

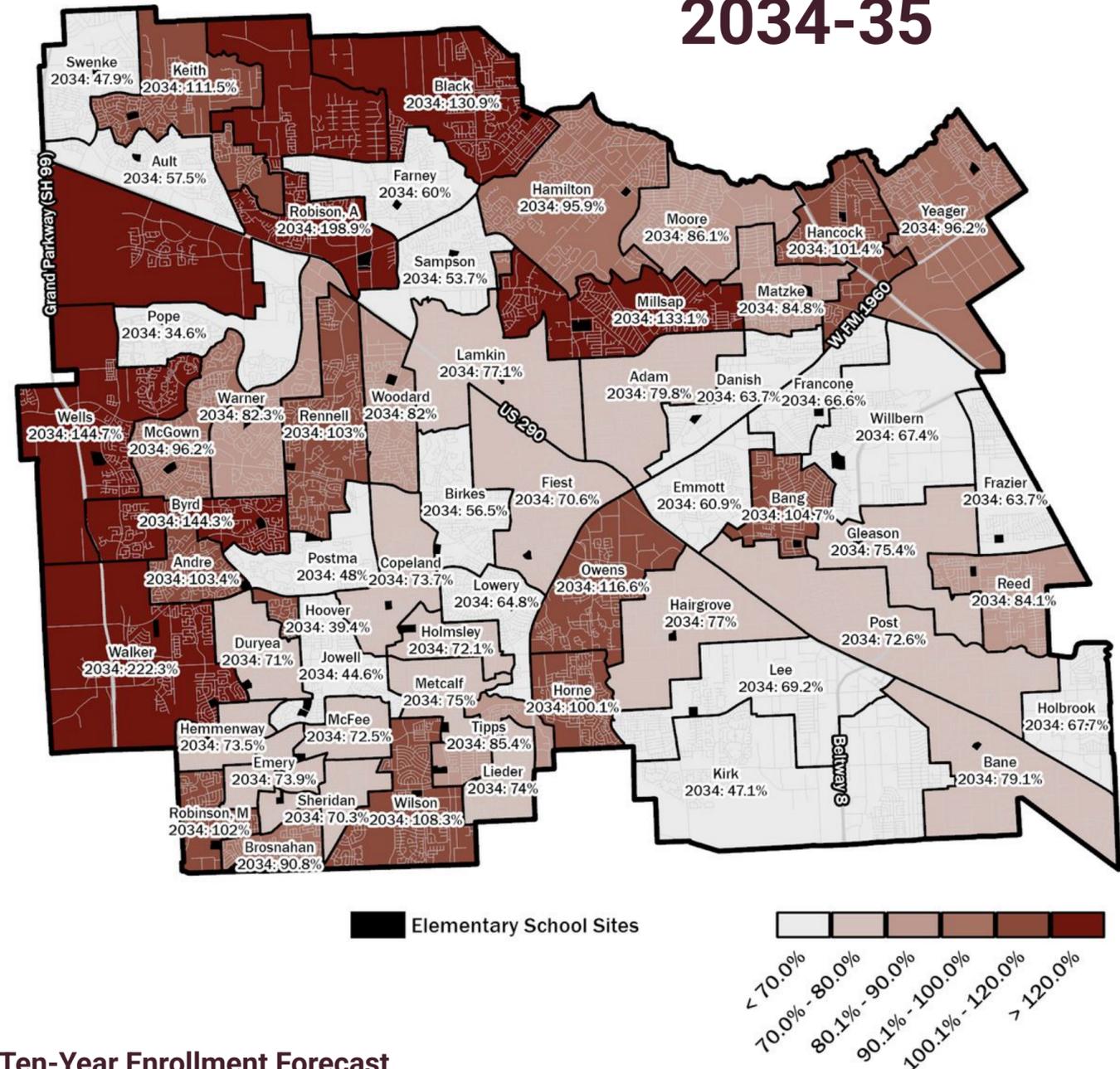
# Projected Elementary School Utilization

Projected Resident Students vs Current Capacity

## 2029-30



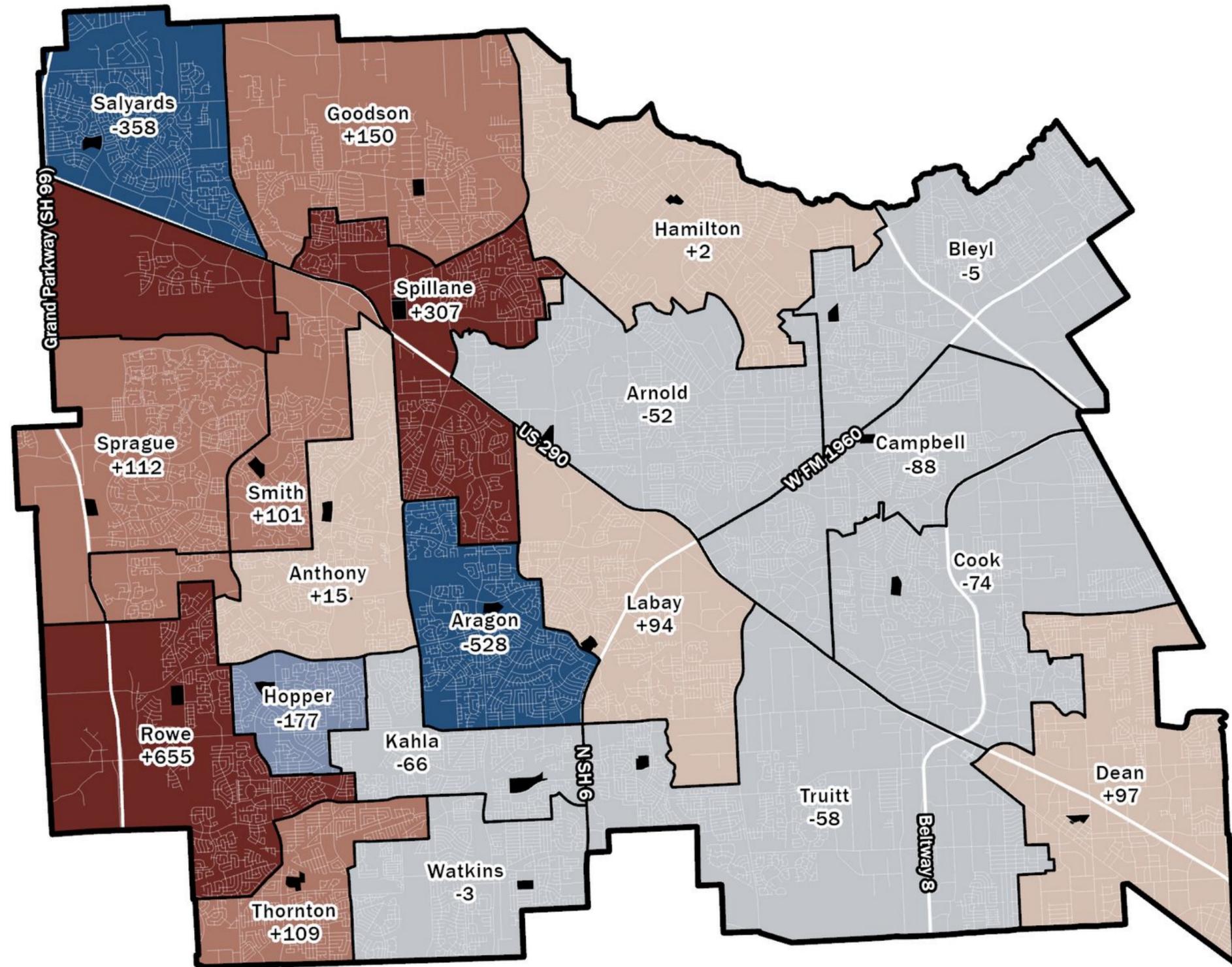
## 2034-35



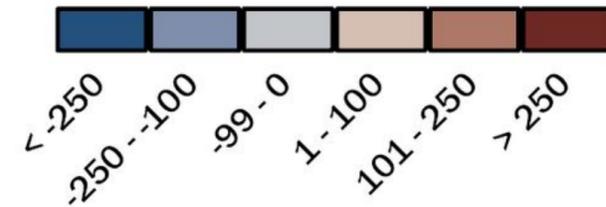
Ten-Year Enrollment Forecast

# Resident Middle School Students

Projected Change  
by Attendance  
Zone  
Fall 2024 - Fall 2034



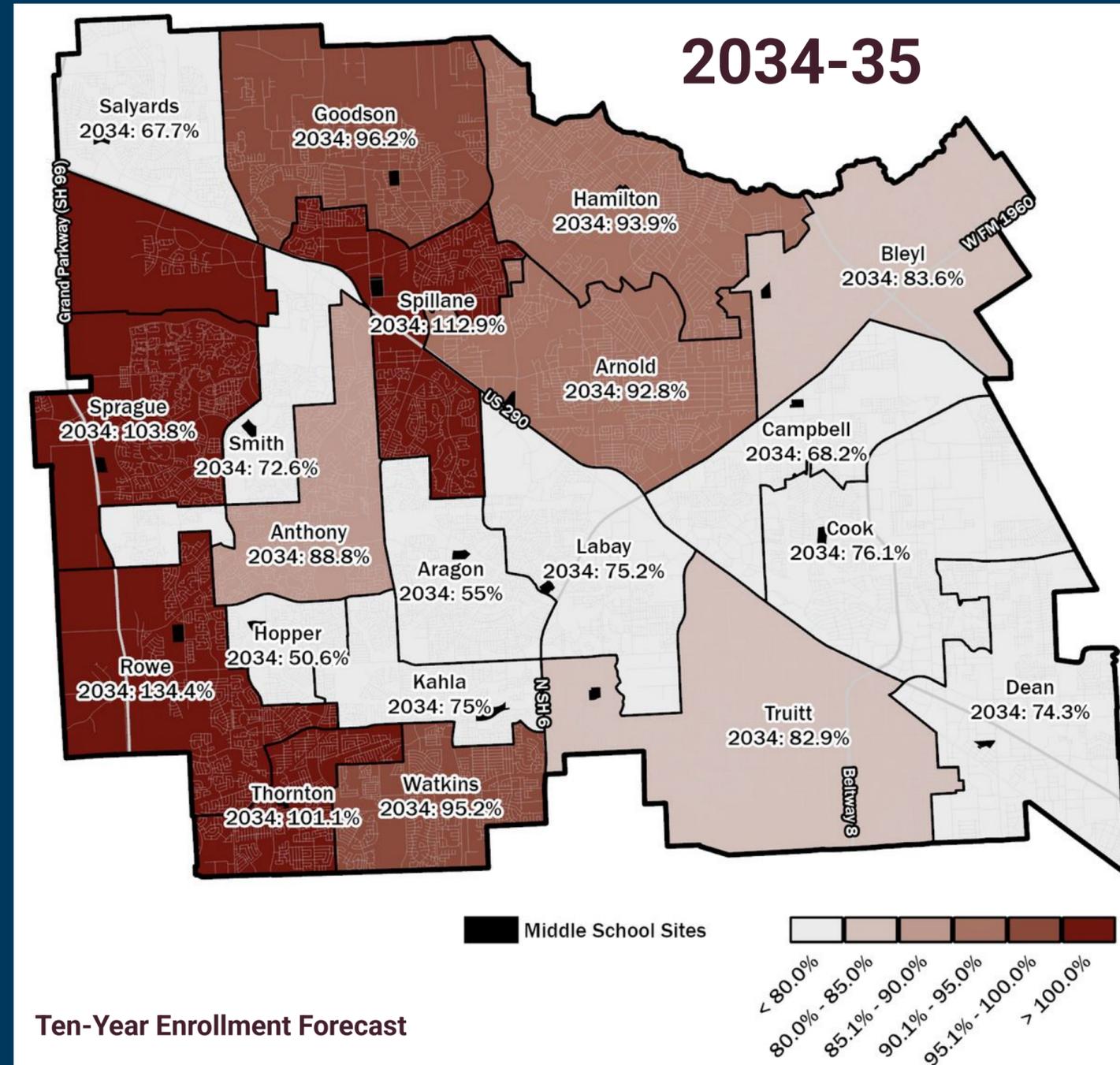
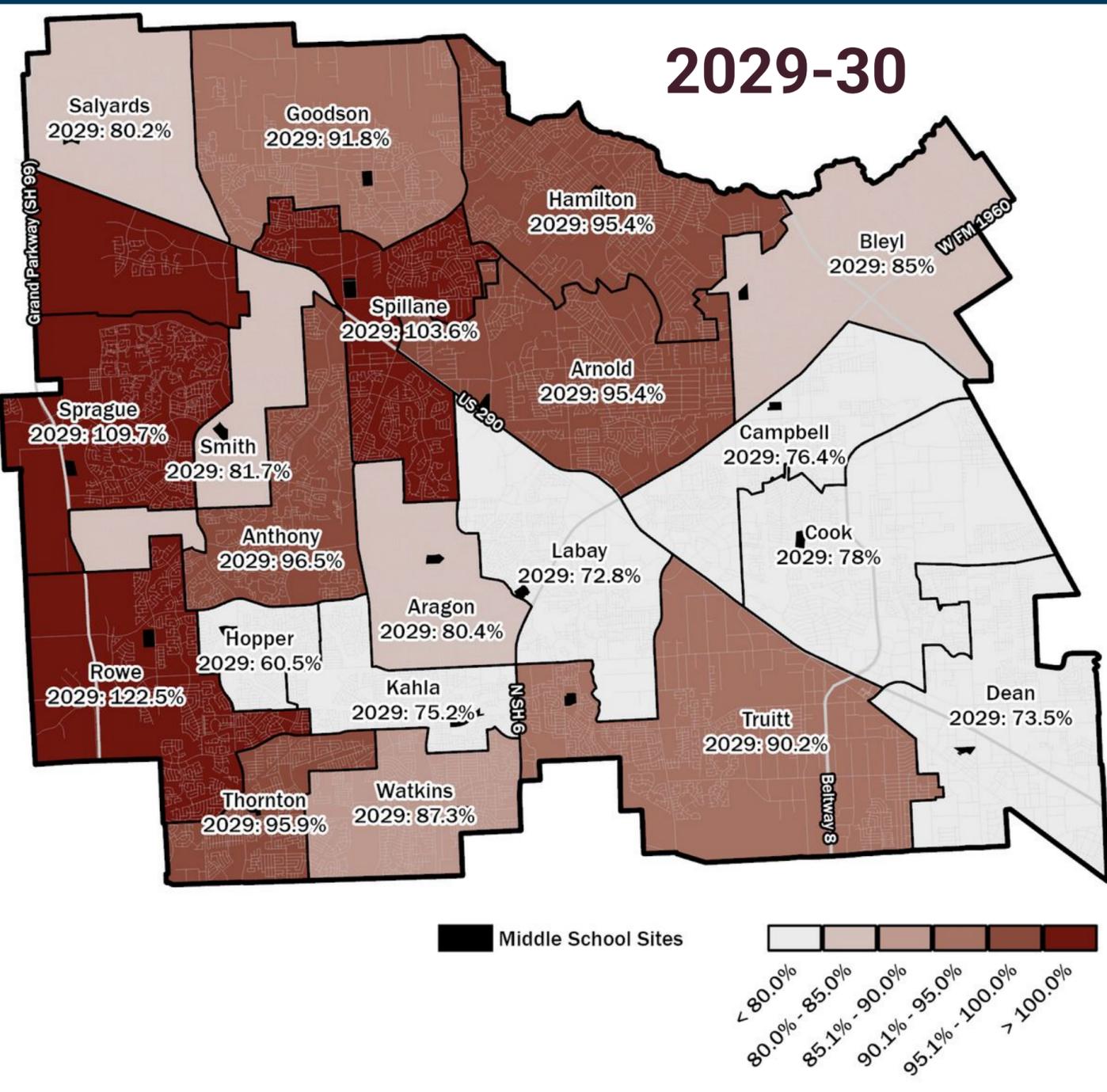
■ Middle School Sites



Ten-Year Enrollment Forecast

# Projected Middle School Utilization

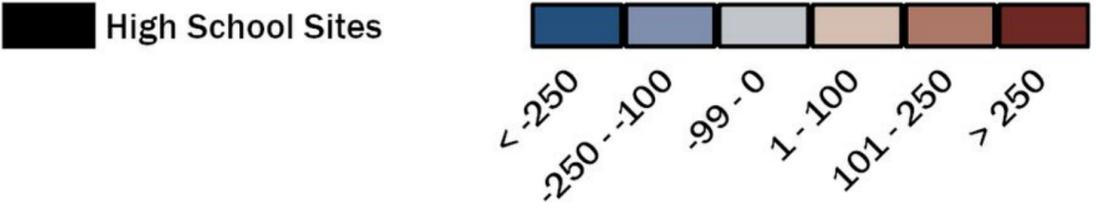
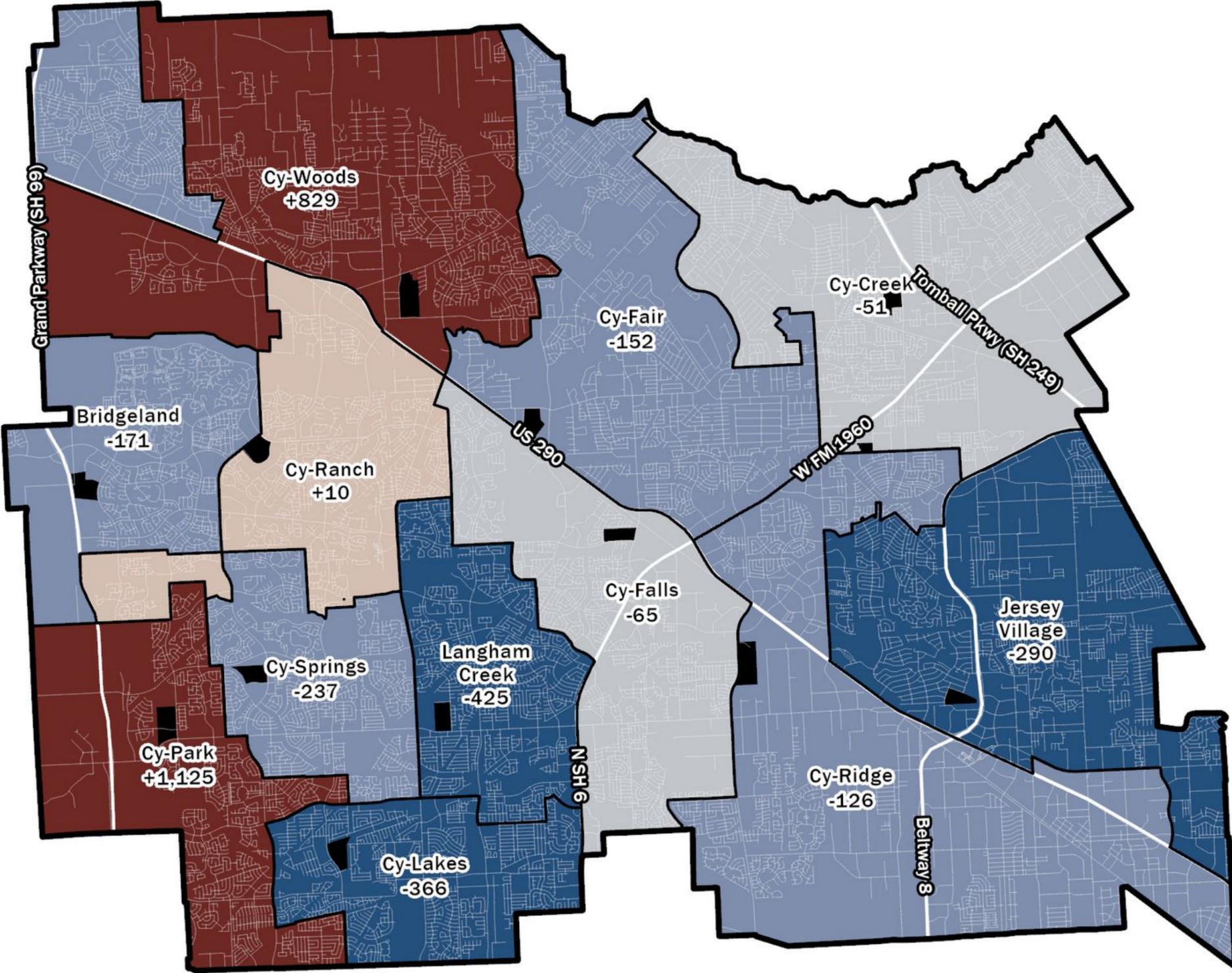
Projected Resident Students vs Current Capacity



Ten-Year Enrollment Forecast

# Resident High School Students

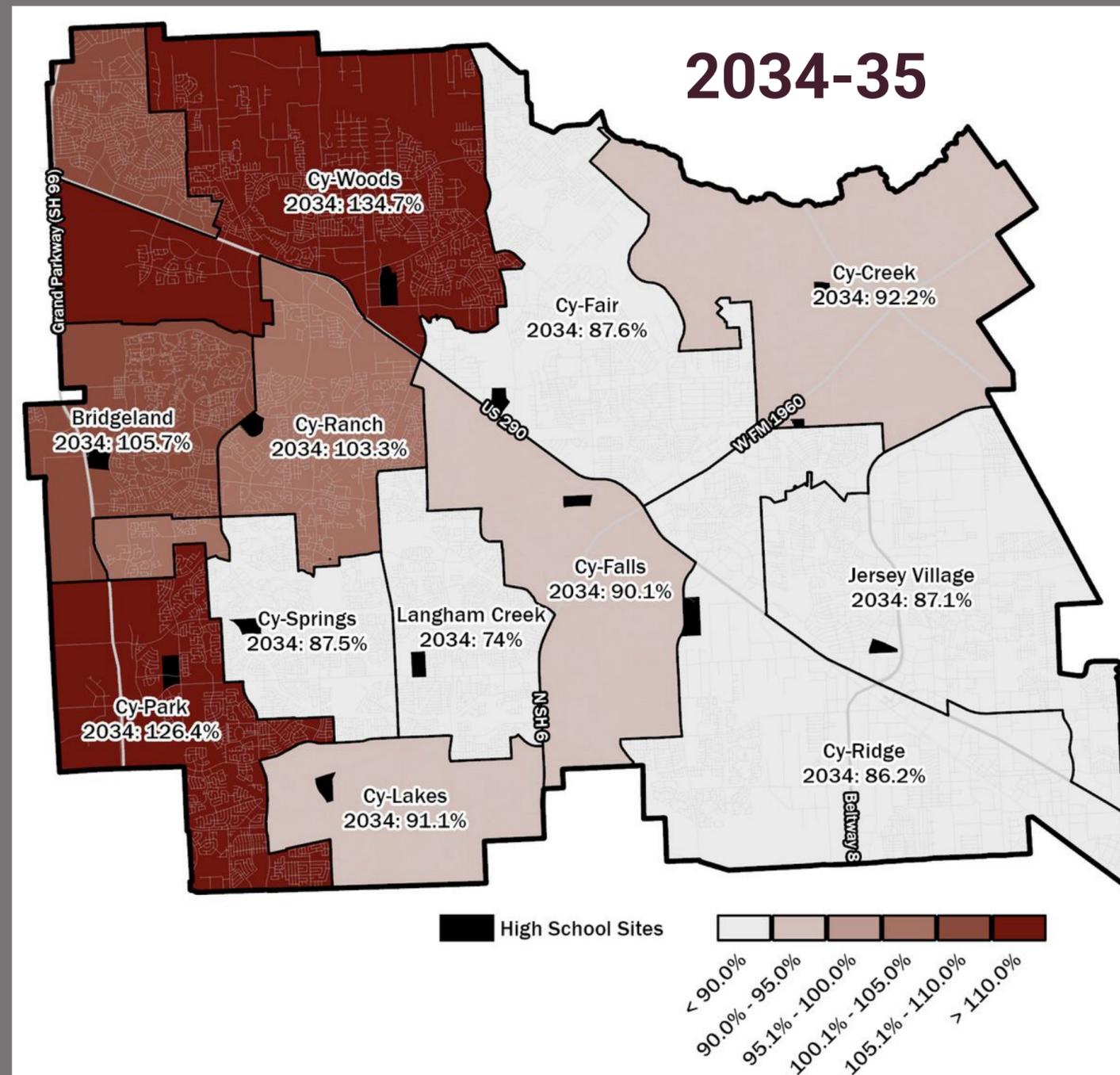
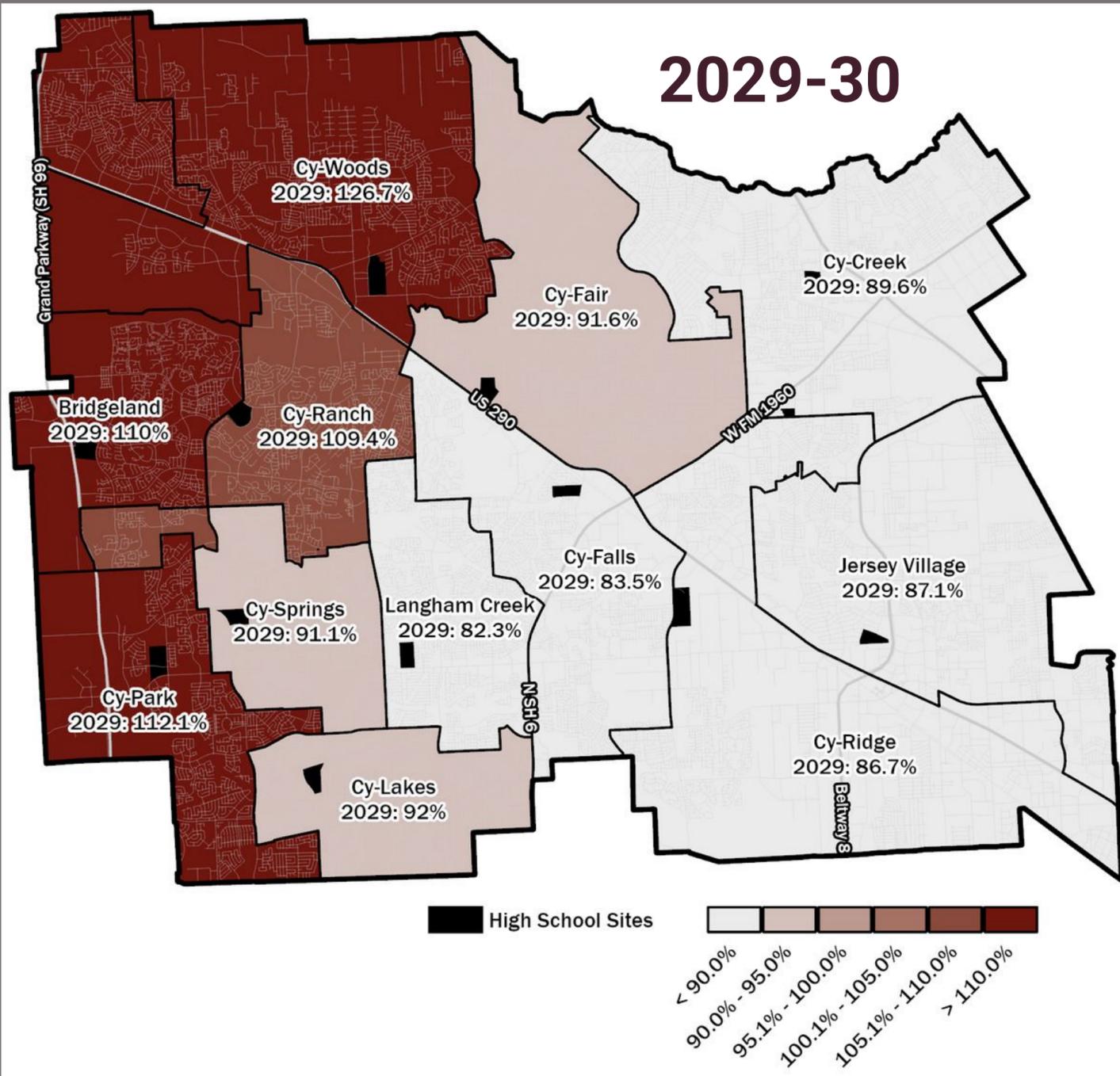
Projected Change  
by Attendance  
Zone  
Fall 2024 - Fall 2034



Ten-Year Enrollment Forecast

# Projected High School Utilization

Projected Resident Students vs Current Capacity



# Demographic Study Take Away Points



- **Cy-Fair ISD demographic life cycle**
  - Most of the District is built out.
  - New housing growth tapers in last half of projection period.
  - Regeneration in built out areas will not yield growth like new construction.
- **West part of the District is growing, while much of the remaining part of the District continues to decline in student population.**
- **Declining births and smaller KG classes have perpetuating impact on enrollment for many years.**
- **Public Alternative Educational Opportunities pull ~7,000 students from CFISD, and this is increasing by 400-500 students per year.**
- **General anti-traditional school sentiment is gaining traction across the State.**

**Many of these declining forces have been happening for years, but they were masked by growth from new housing**



# QUESTIONS?



**Population and Survey Analysts**  
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