SCOTTSDALE UNIFIED SCHOOL DISTRICT
DEMOGRAPHIC AND ENROLLMENT ANALYSIS
2025/26

Draft Report
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APPLIED ECONOMICS

Applied Economics LLC

11209 North Tatum Boulevard, Suite 225

Phoenix, Arizona 85028

602-765-2400

www.aeconomics.com

Executive Summary

The purpose of this Demographic and Enrollment Analysis for the Scottsdale Unified School District (District) is to identify current and historic demographic, development, and enrollment trends, and to anticipate future trends to create 10-year District-level and small-area projections of enrollment by grade. This Demographic and Enrollment Analysis incorporates updated information on enrollment, housing and occupancy rates, household and population characteristics, and residential development. The following is a summary of the major findings.

Some of the main findings and conclusions from this report include:

Enrollment Trends - In 2025/26 the District's 40th-day enrollment totaled 19,742 Kindergarten to 12th grade (K-12) students. This represents a decline of about 360 students (2 percent) compared to the same time last year. Enrollment in the District has declined gradually since 2010/11, dropping by an average of 2 percent per year, cumulatively resulting in a loss of about 6,250 students, despite the fact that housing units have continued to be added and the District attracts a significant number of students from outside of the District. These declines are linked primarily to the aging of the existing population and increasing competition from alternative providers. Both of these trends will likely continue throughout the projection period. Out-of-District enrollment continues to be a significant factor for the District, and the average since 2021/22 is about 4,800 students per year. In-District enrollment has dropped by about 1,900 students (an 11 percent decline) during the same period.

Demographic Shifts - The aging of the District's population is causing a decrease in household sizes, and the nature of new housing additions is shifting more toward non-family oriented, multifamily housing. Currently, the housing stock in the District is made up of 49 percent single family units and 51 percent multifamily units. The vast majority of the new housing built since 2010 has been multifamily additions. The share of householders 65 and older has increased to 32 percent in 2025 (compared to 27 percent in 2010), while the share of the householders in the parent-age population (35 to 54) has decreased to about 31 (compared to 36 percent in 2010).

Historic Construction Activity - New housing development in the District has been dominated by multifamily projects over the past ten years, and multifamily construction has accounted for about 75 percent of total growth. The majority of the remaining new housing has been low-density, single family. Generally speaking, none of these types of housing generate significant amounts of school-age people. The majority of development activity has been located in the southern half of District, much of which has been infill and redevelopment. Multifamily development has been concentrated in the Old Town area, although there have been some additions in other areas, generally near the Loop 101 Corridor.

Future Development Potential - The potential new supply of housing is similar to recent inventory additions, with multifamily accounting for about 78 percent of the total. Single family additions are expected to continue to be primarily low-density properties. Most of the new multifamily units are expected to be high-density, high-amenity, 'luxury' apartments, especially in the Old Town area. In some cases, redevelopment properties will take the place of older residential units, which would mean that the net additions would be lower, and in some cases the replacement projects could be less family-oriented.

Alternative Education Providers - There are currently 12 charter schools operating within the District's boundaries, serving 5,700 K-12 students, and another five charter schools located just outside the District enroll almost 1,500 K-12 students. Of the about 7,200 charter students who attend charter schools in or nearby the District, only about half of the students actually reside in the District. Since 2010/11, charter enrollment has increased by nearly 5,700 K-12 students. A significant shift in this trend began in 2019/20 when charter enrollment increased by fewer than 100 students. With the closing of several smaller charter schools over the last few years, charter enrollment has declined by about 670 students since 2019/20; of these students, nearly 96 percent were K-5 students.

District Enrollment Projections - Based on the projected change in the school-age population and trends associated with the in-District Service Rate, in-District enrollment is projected to steadily decline throughout the projection period. The effect of new home construction on enrollment over the next ten years is expected to be largely offset by the aging of the population in existing housing units and the continued loss of resident students to alternative providers. As a result, total K-12 enrollment is projected to decline by nearly 2,400 students (12 percent) over the next ten years, dropping to about 17,340 students by 2035/36. The District's enrollment losses are projected to be slightly stronger during the second half of the projection period. During the first five-year period from 2025/26 to 2030/31, there could be a loss of almost 1,080 students, which could accelerate to a loss of 1,320 students during the second five-year period from 2030/31 to 2035/36. Unlike the first five-year period, the majority of the loss (46 percent) is expected to come from declines in 9-12 enrolment between 2030/31 and 2035/36.

Enrollment Projections by School - Sub-District enrollment projections were created based on the attendance at each school and the residency of the District's student population. In order to use the projections of enrollment by attendance area (place of residence) to project enrollment by school, it is necessary to account for where students actually attend school. Only about 64 percent of the K-8 students from within the District's boundary attend the school designated for their place of residence, while about 77 percent of the 9-12 students attend the designated school for their area of residence.

Among the 24 K-8 schools, only one, Mohave Middle School, is projected to experience nominal increases in enrollment over the next ten years. K-8 enrollment losses over the 10-year period are projected to range from about 140 students (Copper Ridge and Tonalea) to about 10 students (Echo Canyon). Total K-8 enrollment could equal about 10,740 students by 2035/36.

At the high school level, all five schools are expected to experience enrollment decreases over the next ten years. The largest loss during the projection period is expected at Desert Mountain (-300 students). While Desert Mountain is currently the largest high school, it could be surpassed by Arcadia by the end of the projection period. Coronado will continue to be the smallest of the five high schools with enrollment of just 560 students in 2035/36. Total 9-12 enrollment could equal almost 6,610 students by 2035/36.

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1.0 Introduction

The 2025/26 Demographic and Enrollment Analysis for the Scottsdale Unified School District (District) incorporates information on enrollment, demographic trends, 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.

The District is comprised of two geographic areas that can best be described as the southwest and northeast sections. The southwestern section is bounded by 40th Street to the west, Thomas Road to the southwest, McKellips Road to the southeast, the Loop 101 Freeway to the east, and Cactus Road to the north. The northeastern section is bordered by Pinnacle Peak Road to the north, the Loop 101 freeway/Pima Road to the west, generally 136th Street to the east, and the Salt River Pima-Maricopa Indian Community south of Shea Boulevard. **Map 1** shows the District boundaries, the six Learning Communities (high school attendance areas), and the 343 study grids.

The balance of this report is divided into the following sections:

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. This section also compares 2010 and 2020 Census data and presents 2025 estimates that identify trends in key District population and housing characteristics that impact enrollment.

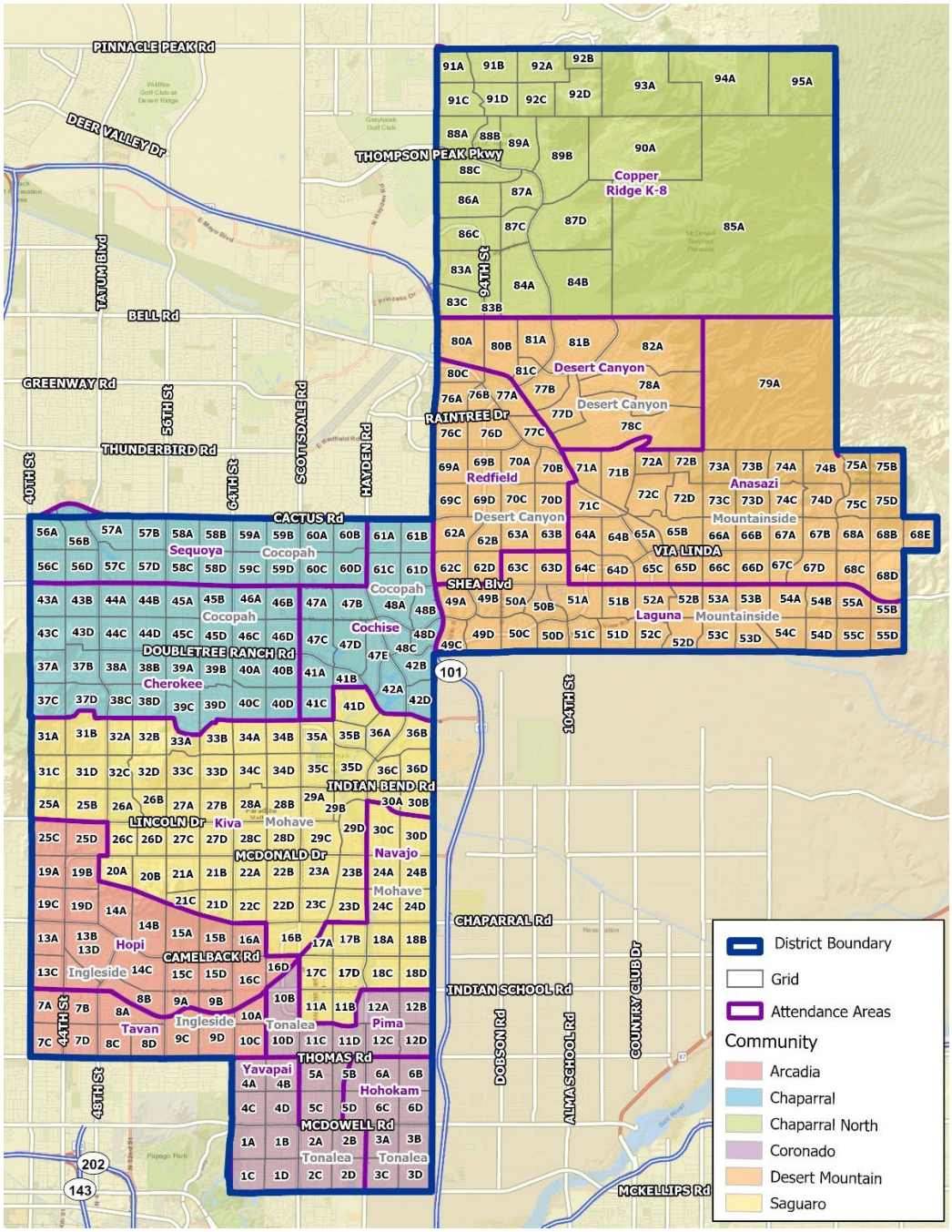
Section 3, Residential Development, presents information on current construction activity and the future supply potential of additional housing units. It estimates the timing of housing construction based on regional growth forecasts, current construction activity, and the ownership and zoning status of vacant land available for future residential development. The housing potential is segmented both by the type and density of housing products and the timing of known housing projects within the District. These projections are instrumental in predicting the future level and distribution of enrollment within the District.

Section 4 provides district enrollment projections. These projections are created by analyzing past demographic and housing market trends and extending them based on the expected additions in residential housing and the associated change in the school-age population. Future enrollment projections are also impacted by the share of the District's population that will choose to attend District schools. These projections account for regional and local trends in socioeconomic conditions and economic growth forecasts.

Section 5, Sub-District Projections, details enrollment projections by attendance area and school. District-level student generation rates are combined with expected housing additions, market conditions, and demographic trends at the grid level to estimate future enrollment by place of residence. The grid-level data is aggregated to form projections by attendance area and can also be used to examine potential changes to facilities and boundaries. The relationship between the number of students that reside within an attendance area and that school's enrollment shows the impact of student movement, including students from outside the District. This relationship is applied to attendance area projections to forecast enrollment by 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



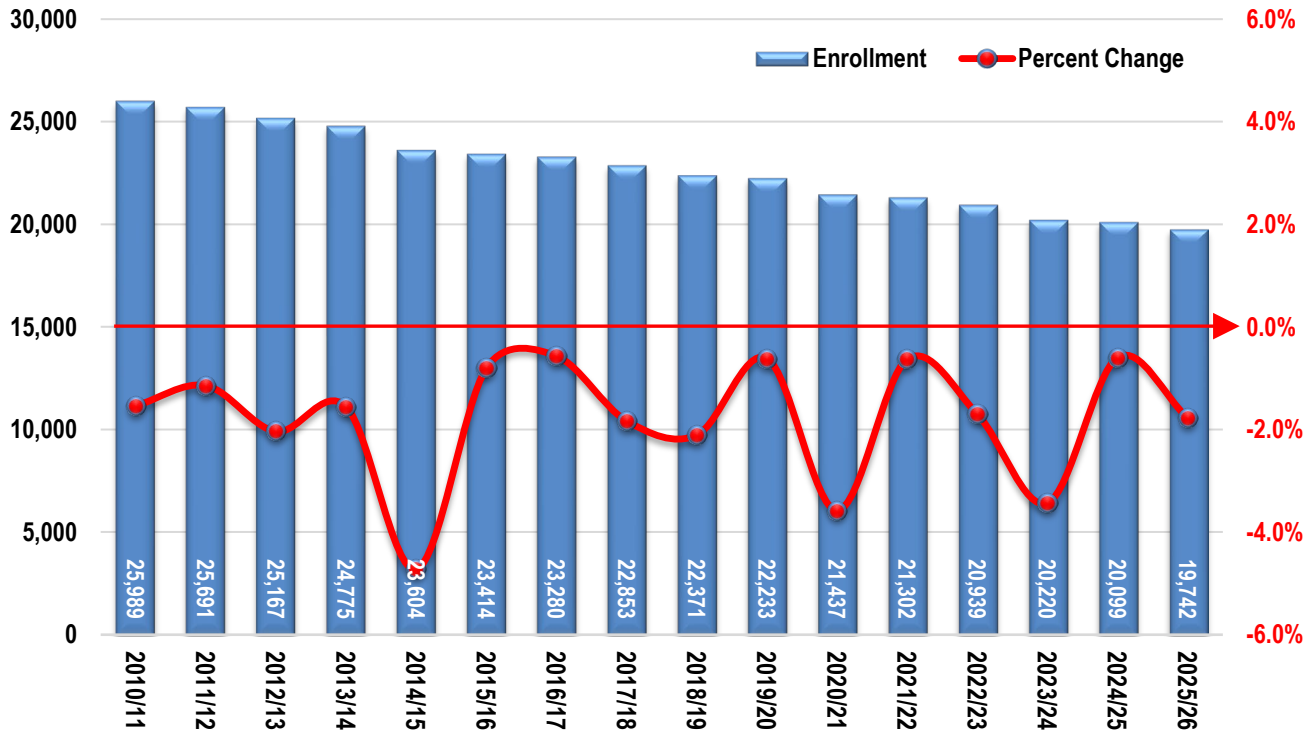
2.0 Existing Conditions

2.1 Enrollment

Total Kindergarten through 12th grade (K-12) enrollment in the District was 19,742 students in the fall of the 2025/26 school year, representing a decrease of about 360 students (2 percent) since 2024/25, as illustrated in **Figure 1**. From 2010/11 through 2019/20, District enrollment declined by about 3,800 students, or around 420 students per year, despite the fact that housing units continued to be added and that the District attracted a significant number of students from outside of the District. These declines are linked primarily to the aging of the existing population and increasing competition from alternative providers.

There was a decline in enrollment in 2020/21 due to the pandemic, which was fairly universal across all districts in the region. The District did not have a return of students it had lost, and enrollment has continued to decline. K-12 enrollment has declined by about 2,490 students, or 11 percent, below the total 2019/20 (pre-pandemic) enrollment.

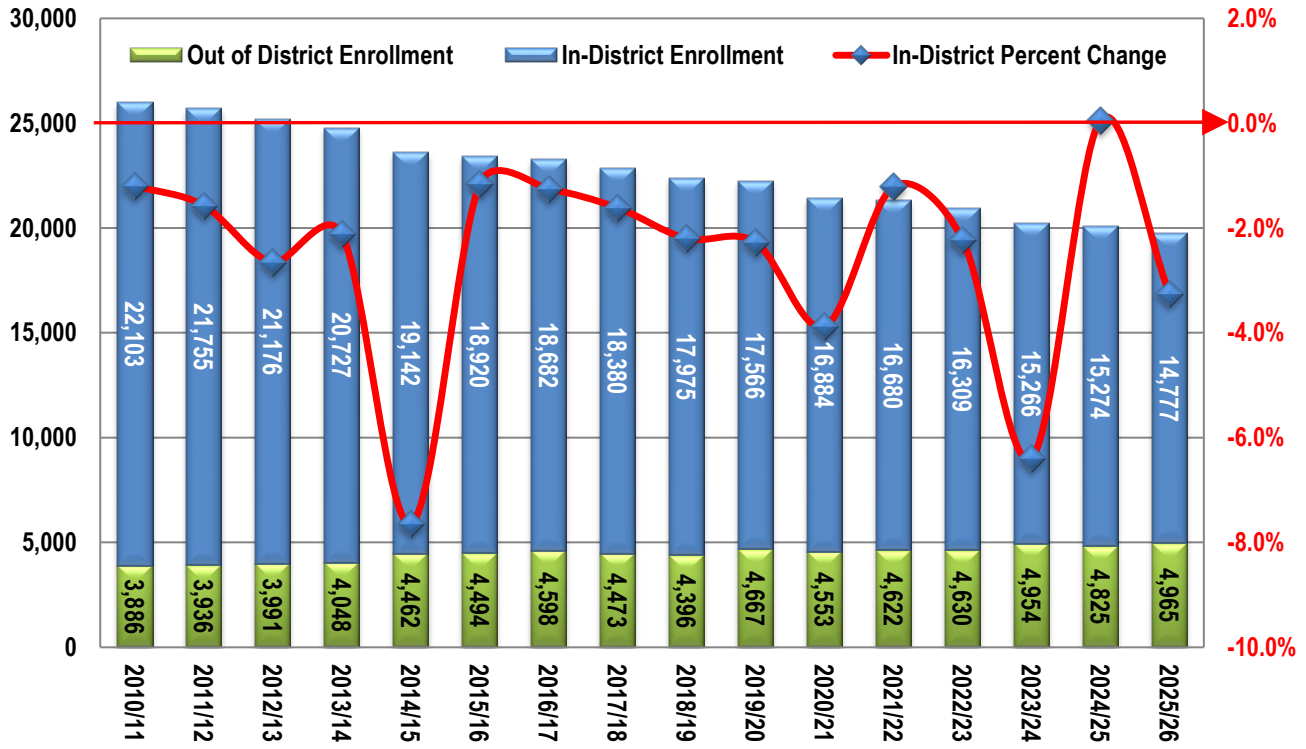
FIGURE 1
HISTORIC ENROLLMENT



Sources: Arizona Department of Education; Scottsdale Unified School District.

Out-of-District enrollment continues to be a significant factor for the District. In all, about 4,970 of the District's K-12 students (25 percent) reside outside District boundaries, which is relatively high compared to most metro area districts (**Figure 2**). In 2013/14, out-of-District enrollment began to exceed 4,000 students. Between 2013/14 and 2019/20, average out-of-District enrollment was about 4,450 students. The average since 2021/22 has increased to an average enrollment of about 4,800 out-of-District students. While out-of-District enrollment has increased, in-District enrollment has declined by nearly 7,330 students since 2010/11. To put this into perspective, since 2010, in-District enrollment has decreased by 33 percent while out-of-District enrollment has increased by 28 percent. Also, while out-of-District students only comprised 15 percent of total enrollment in 2010/11, this percentage has increased to over 20 percent since 2019/20.

FIGURE 2
ENROLLMENT BY SOURCE AND ENROLLMENT CHANGE

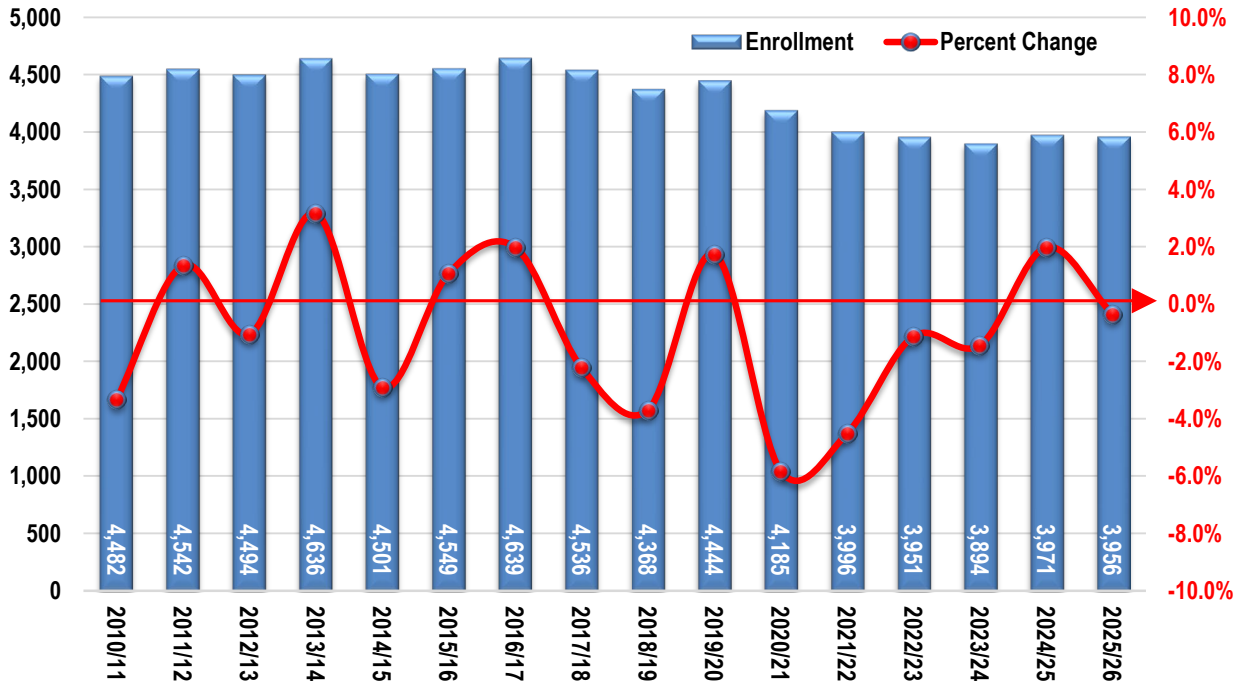


Source: Scottsdale Unified School District.

In order to get a more detailed understanding of the sub-District trends that are impacting enrollment, similar information on enrollment change for each Learning Community is depicted in **Figures 3A** through **3F**. A community represents a high school attendance area and all of the elementary and middle schools that are within that attendance area.

There are currently about 3,960 K-12 students in Arcadia Community schools. Since 2010/11, enrollment in this community has declined by nearly 1 percent per year on average. By comparison, District K-12 enrollment has declined by an average of nearly 2 percent per year during the same ten-year period. This year, enrollment in the Arcadia Community declined by 0.4 percent (15 students) compared to 2024/25. This decline was due to a drop of nearly 50 students in Kindergarten to 8th grade (K-8), which was offset by an increase of about 30 students in 9th through 12th grade (9-12) enrollment. Historically, the most significant losses in the Arcadia Community schools have been at the Kindergarten to 5th grade (K-5) level, where enrollment has declined by about 24 percent since 2010/11.

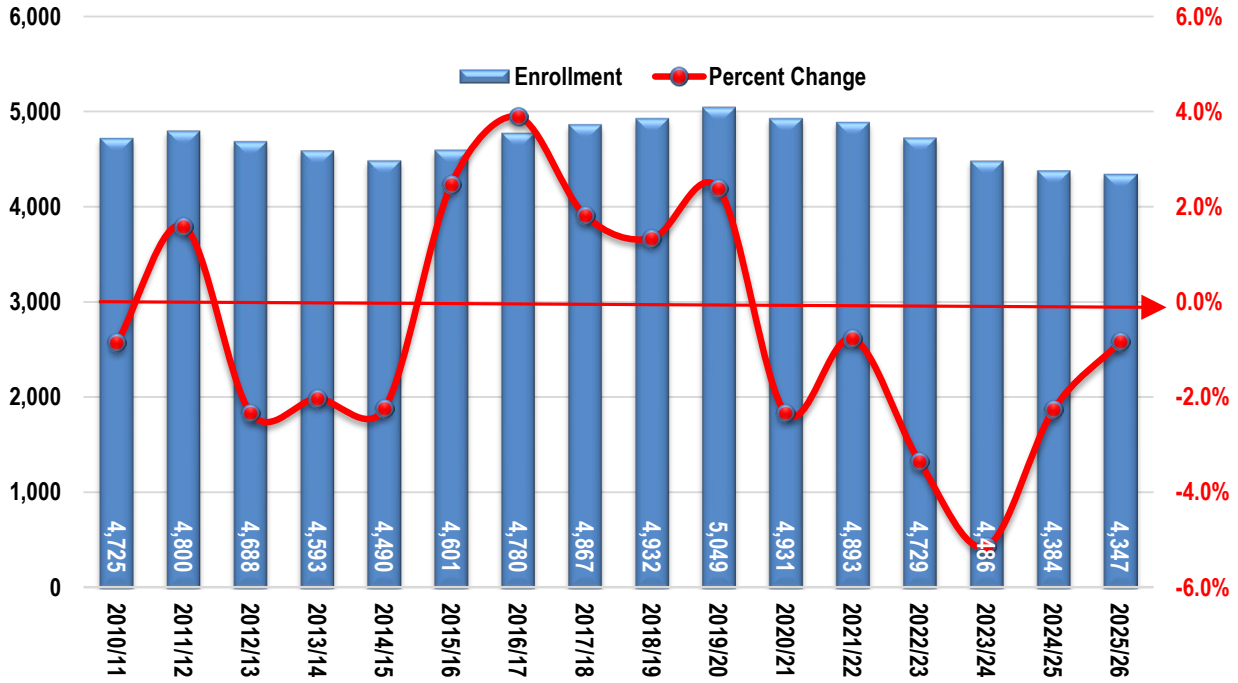
FIGURE 3A
ENROLLMENT AND ENROLLMENT CHANGE
ARCADIA COMMUNITY



Source: Scottsdale Unified School District.

With about 4,350 K-12 students, enrollment in the Chaparral (South) Community declined by about 40 students since last year. Since 2019/20, however, enrollment has declined by about 700 students, or an average loss of about 120 students per year. Although the Chaparral (South) Community experienced several years of modest enrollment gains (2015/16 to 2019/20), overall enrollment declines have since occurred in all but four grades since 2019/20. The largest overall decline has been in the 9-12 cohort, which has lost nearly 660 students (28 percent) since 2019/20.

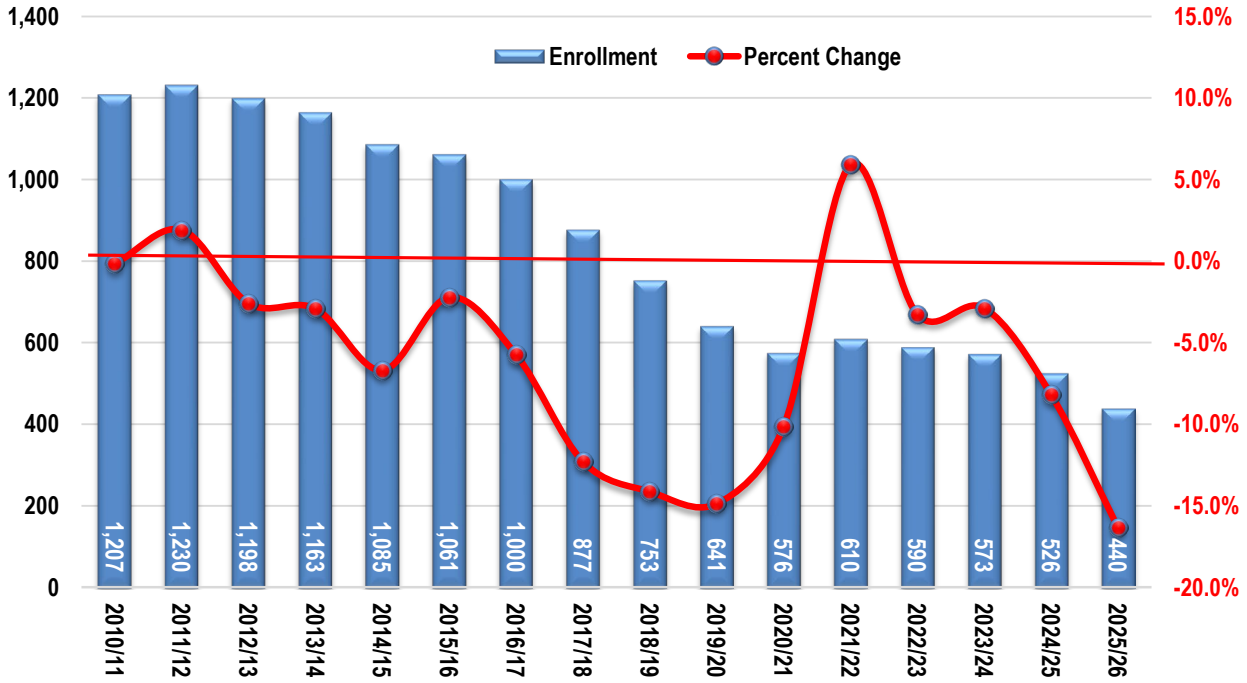
FIGURE 3B
ENROLLMENT AND ENROLLMENT CHANGE
CHAPPARAL (SOUTH) COMMUNITY



Source: Scottsdale Unified School District.

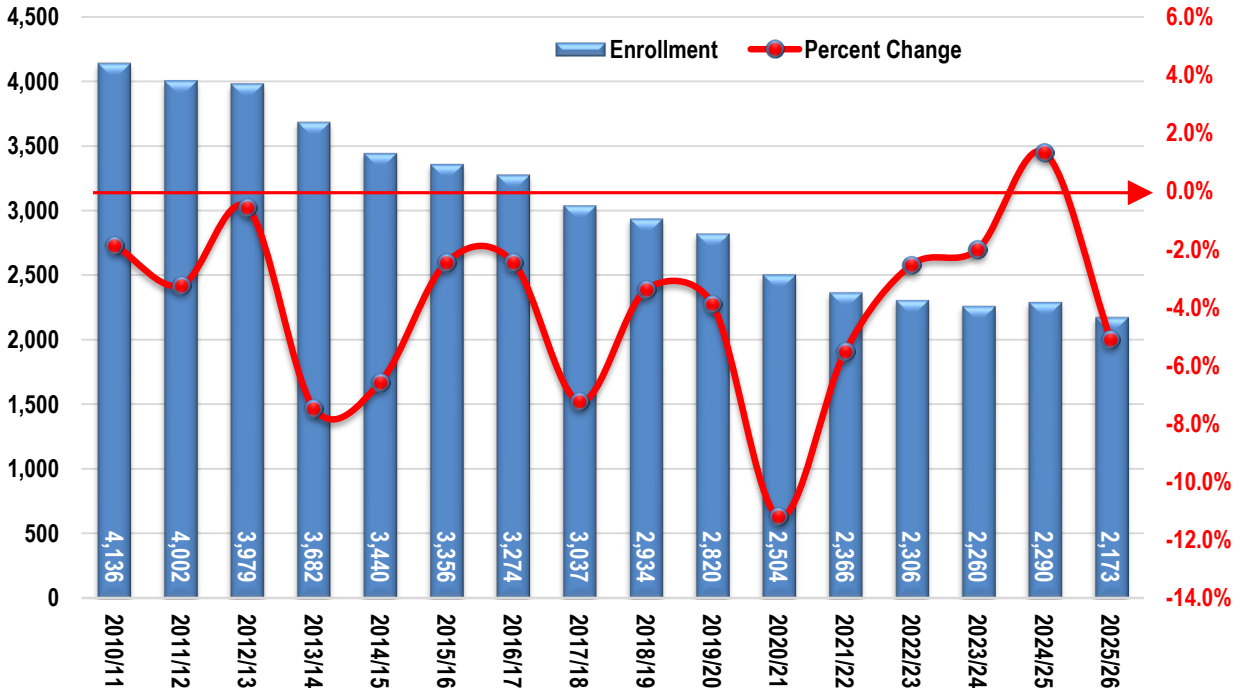
The Chaparral North Community consists of the northeastern part of the Chaparral High School attendance area, where Copper Ridge Elementary currently serves 440 K-8 students. Since 2010/11, K-8 enrollment has declined nearly year except two (2011/12 and 2021/22). The gain in 2021/22 was likely due to the return of students who were "lost" during the height of the pandemic in 2020/21. The enrollment loss this year was significant at about 90 students, or 16 percent. Percentage-wise, this is the greatest loss this Community has seen in the historical period shown.

FIGURE 3C
ENROLLMENT AND ENROLLMENT CHANGE
CHAPPARAL NORTH COMMUNITY (K-8)



Source: Scottsdale Unified School District.

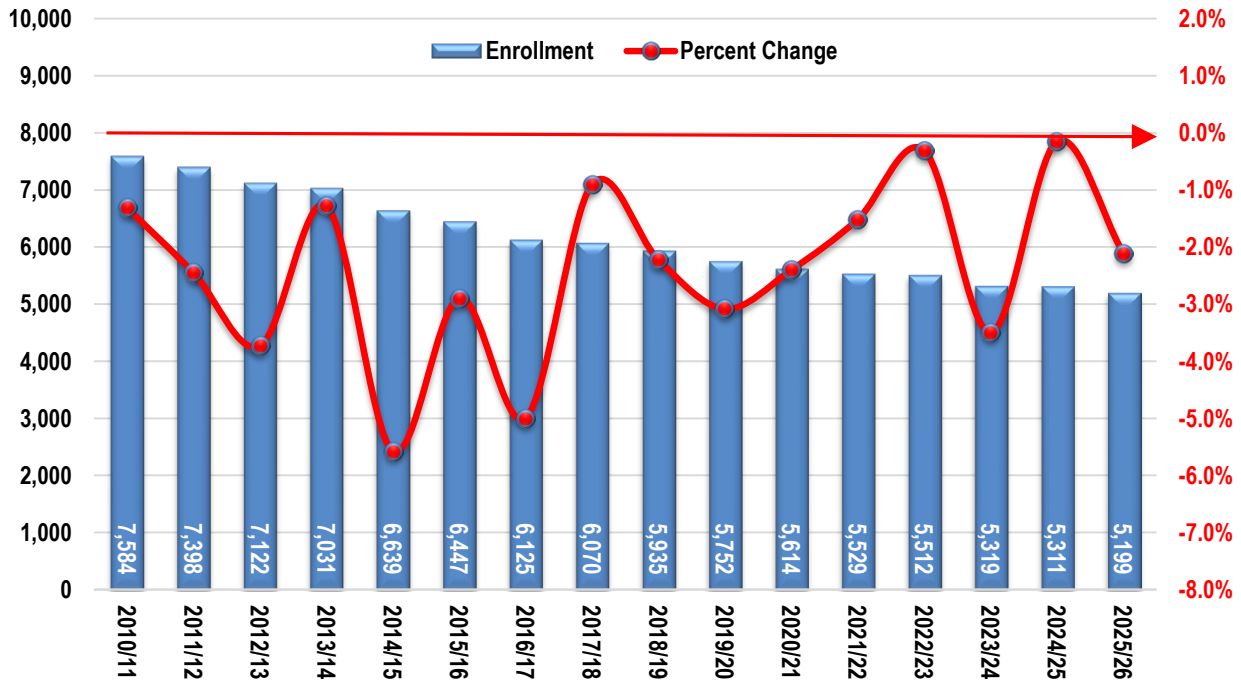
FIGURE 3D
ENROLLMENT AND ENROLLMENT CHANGE
CORONADO COMMUNITY



Source: Scottsdale Unified School District.

Enrollment in Coronado Community schools, which currently totals about 2,170 K-12 students, has declined nearly every year since 2010/11 (except 2024/25), dropping by 4 percent per year on average during this time. This year, enrollment declined by 5 percent (120 students) compared to 2024/25. Historically, the losses in this community have occurred across all of the grade levels, but this year there was a slight gain of about 30 students (6 percent) in 3rd to 5th grade (3-5) enrollment. Unfortunately, this gain did not offset losses in the K-2 (about 70 students), 6th to 8th grade (6-8) (about 30 students), and 9-12 (about 50 students) cohorts.

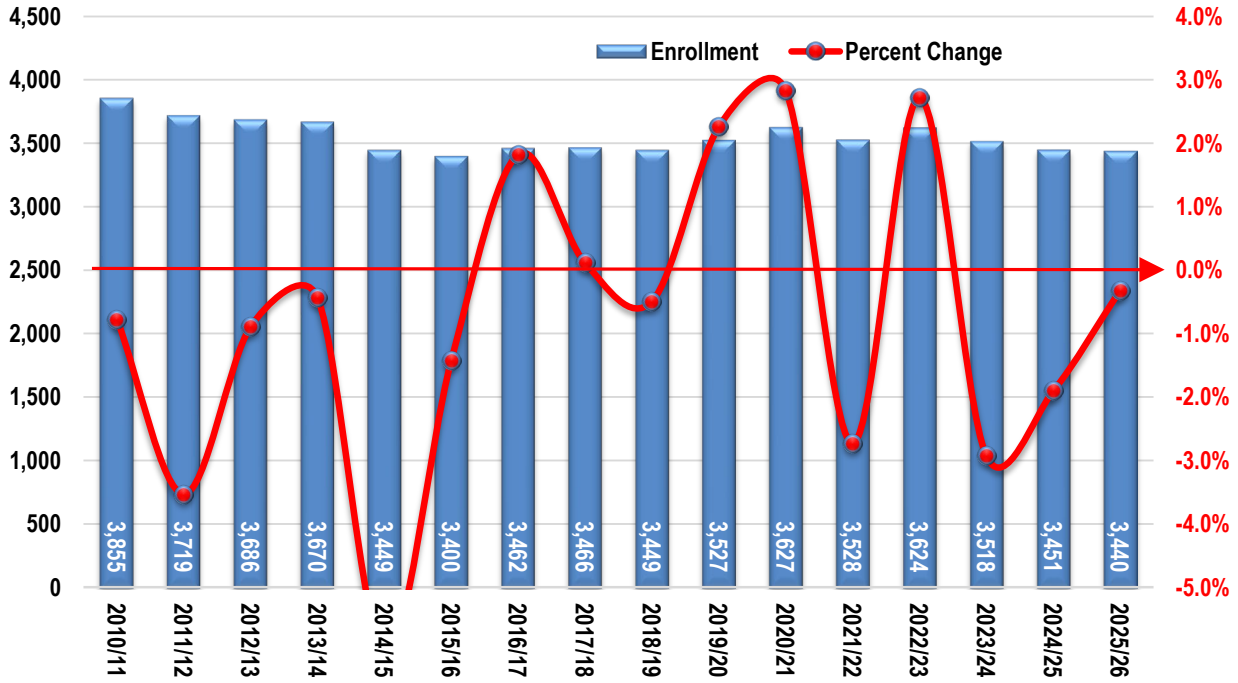
FIGURE 3E
ENROLLMENT AND ENROLLMENT CHANGE
DESERT MOUNTAIN COMMUNITY



Source: Scottsdale Unified School District.

With nearly 5,200 K-12 students in 2025/26, enrollment in the Desert Mountain Community schools is significantly larger than the other communities, but enrollment has been steadily decreasing (about 3 percent per year on average since 2010/11) and is down nearly 2,390 students compared to 2010/11 total enrollment. The decline in enrollment this year (2 percent or 110 students) and was driven by a nearly 60-student loss in 9-12 enrollment. Although there have been enrollment declines in all of the grade levels, K-8 enrollment losses account for about 79 percent of the decrease that has occurred since 2010/11. This trend reflects the aging of the households in the community and the fact that younger students are more likely to attend charter schools than older students.

FIGURE 3F
ENROLLMENT AND ENROLLMENT CHANGE
SAGUARO COMMUNITY

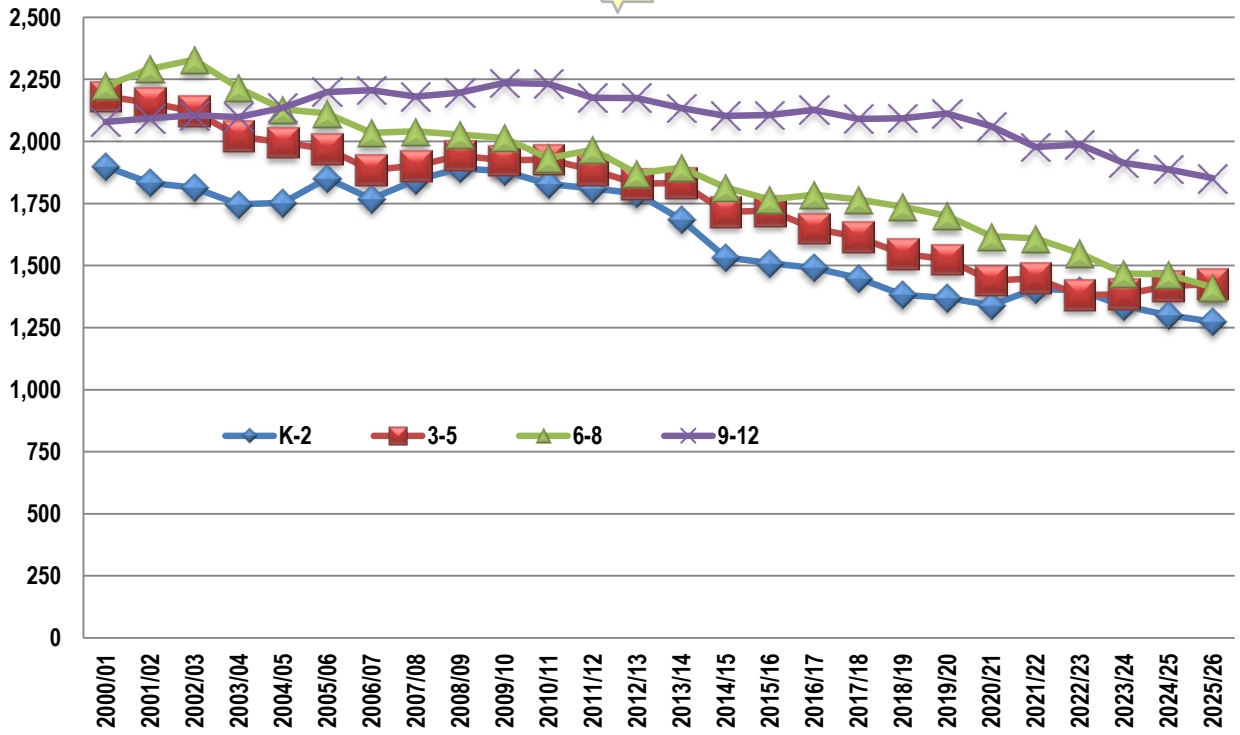


Source: Scottsdale Unified School District.

The Saguaro Community currently has 3,440 K-12 students in its schools, which represents a 0.3 percent decrease (11 students) over 2024/25. The gains in the two younger cohorts (K-2 and 3-5) were offset by the losses in the 6-8 cohort. The 9-12 cohort declined nominally by four students. Since 2020/21, enrollment has declined in all but one years (2022/23), averaging a 1 percent decrease per year during the period. Since 2010/11, total enrollment in the community has declined by 415 students, which has been primarily driven by losses in both the 6-8 (-190 students) and K-2 (-120 students) cohorts. The 3-5 cohort has been fairly steady, only losing 10 students in the cohort since 2010/11, while the declines in the 9-12 cohort have started to accelerate in recent years.

The breakdown of enrollment by grade cohort provides insights into past and current enrollment characteristics and highlights structural trends that will continue to shape enrollment in the coming years. To facilitate the comparison of the cohorts, average enrollment per grade is calculated for each of the four grade cohorts. **Figure 4** displays the average enrollment by grade level in District schools since 2000/01. Average 9-12 enrollment remains the largest by far, which is indicative of a mature, move-up community.

FIGURE 4
AVERAGE ENROLLMENT PER GRADE BY COHORT



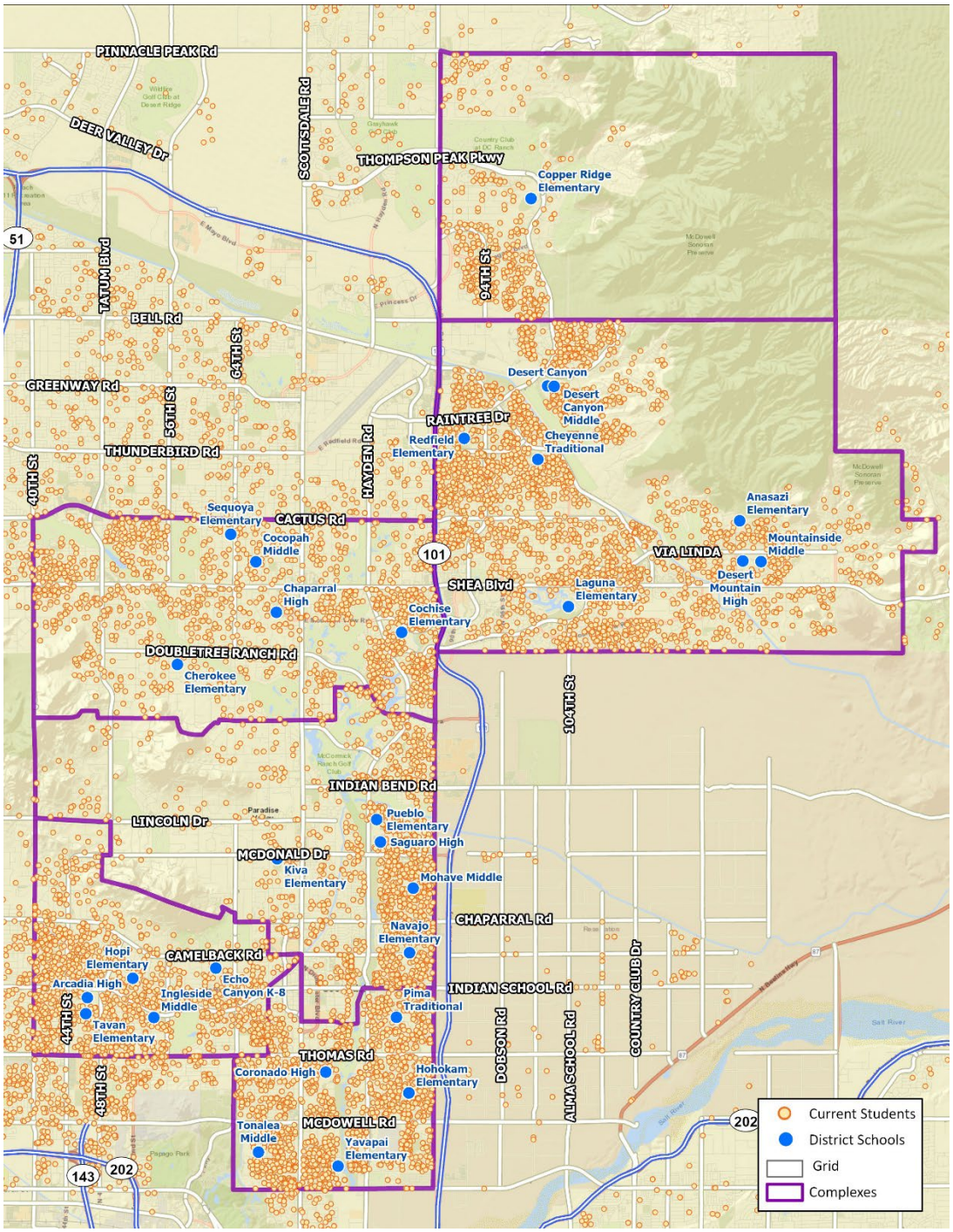
Sources: Arizona Department of Education; Scottsdale Unified School District.

Due to the anomalous effects of the COVID-19 pandemic, average grade-level enrollment declined in all four cohorts in 2020/21. Prior to 2020/21, average 9-12 enrollment was stable at about 2,100 students per grade, but it has since declined to under 2,000 students per grade. The 6-8 cohort continues to be the second largest, and it appears to have stabilized at around 1,400 students per grade. Again, this is reflective of the move-up nature of much of the housing market in the District. Excluding 2021/22 where both the K-2 and 3-5 cohorts increased significantly due to the return of students after the pandemic, there have been declines in both cohorts, likely due to increasing home prices in much of the District and increased competition from charters schools.

While the size of an incoming Kindergarten class certainly plays a major role in determining enrollment in each successive grade level, a myriad of other factors, including increased charter school competition, special program additions or closures within the District or in neighboring Districts, and the overall economic climate ultimately affect enrollment (and to a greater extent in some cohorts than others).

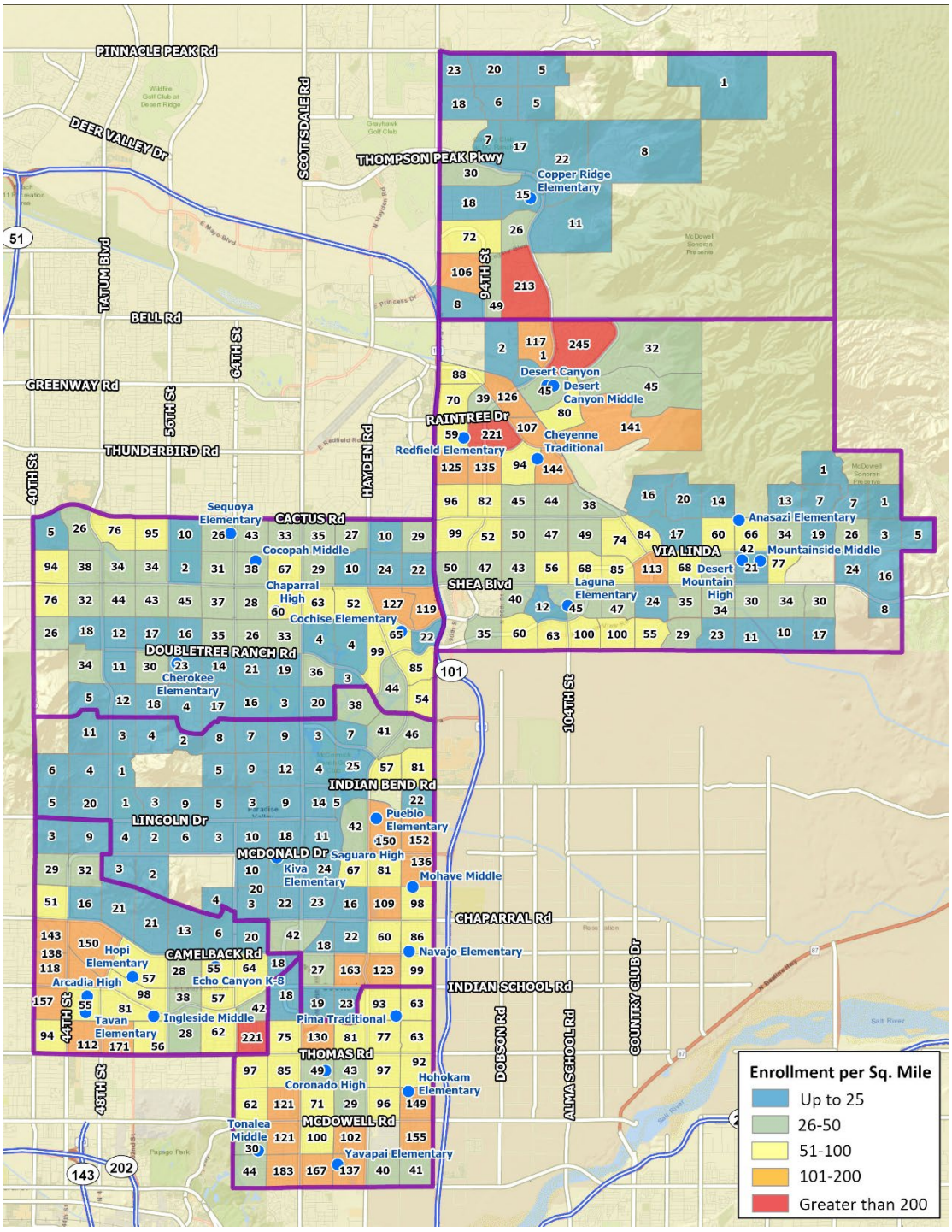
In addition to looking at enrollment by grade, it is also useful to analyze the geographic distribution of students. **Map 2** shows the current point location of students attending District schools. Note that this map includes students that reside within the District and those who reside in surrounding out-of-District areas. The majority of the student population lives in the central and southern portions of the District, with a significant number of students living just south and west of the District boundaries.

MAP 2
GEOGRAPHIC DISTRIBUTION OF STUDENTS: 2025/26



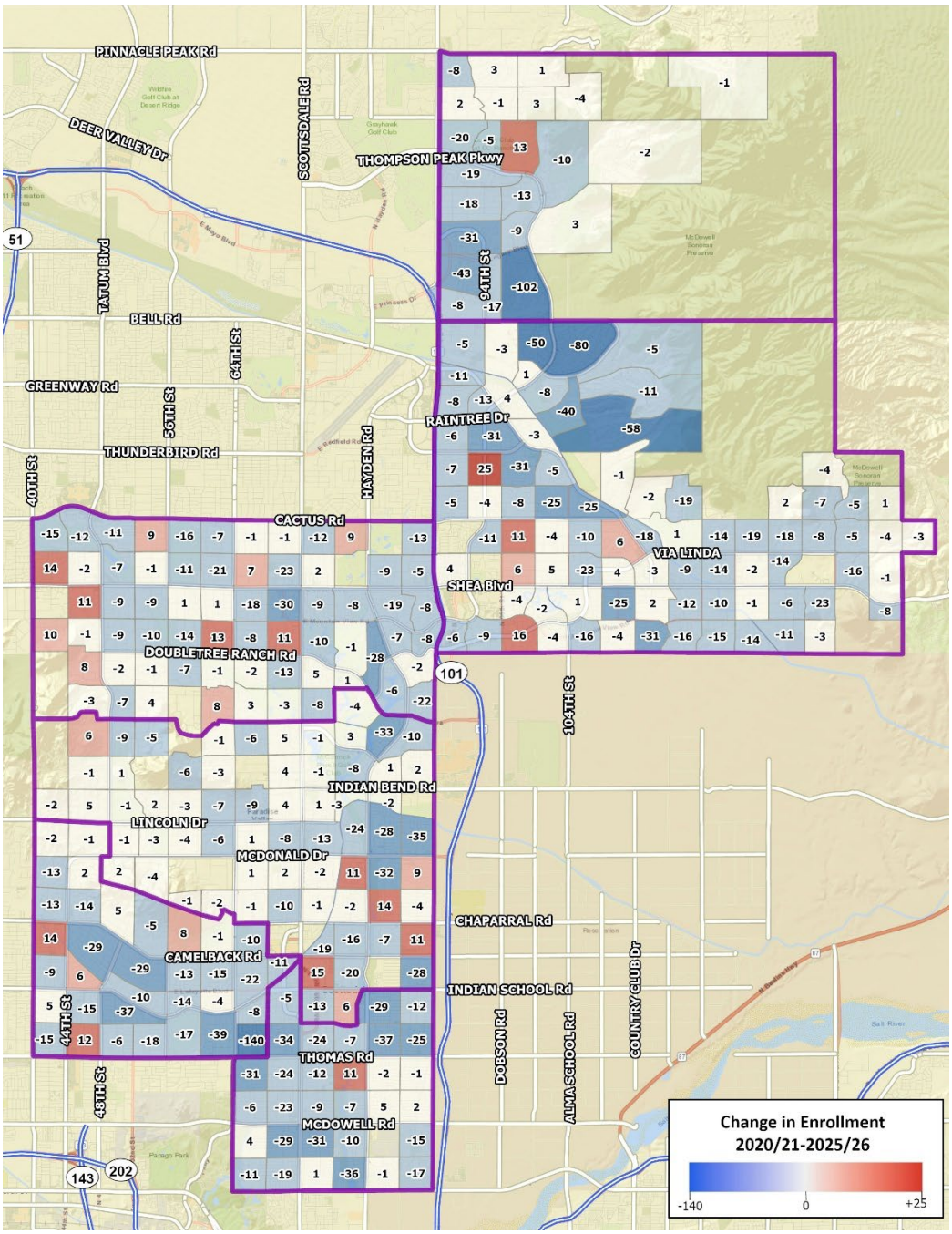
Map 3 depicts the number of current resident students within each planning grid. While the grids vary in size somewhat, the coloring of the grids provides a good depiction of enrollment density. It also illustrates the highly dispersed nature of areas with high and low enrollment levels, which can present extra challenges for facility planning and transportation.

MAP 3
ENROLLMENT PER GRID: 2025/26



Tracking the location of District students can also be used to analyze changes in the distribution of enrollment over time. **Map 4** shows changes in in-District enrollment since 2020/21. The map shows widespread losses in enrollment, with the largest declines occurring in the most northern and southern portions of the District. The few areas of enrollment increase during this period are scattered but are mostly west of Loop 101.

MAP 4
CHANGE IN ENROLLMENT: 2020/21 – 2025/26



2.2 Demographic Trends

Table 1 contains Census data on population and housing in the District for 2010 and 2020, and estimates for 2025 prepared by Applied Economics. This information can help to explain recent trends and the current character of the area. Between 2010 and 2020, the District's population grew by just over 16,700 people (or 0.7 percent per year on average). The current population is estimated at about 246,430, representing a 0.7 percent increase per year since 2020.

Population growth slowed after 2010, and it has remained at the same rate through 2025. However, since 2020, the growth in housing units and households (occupied housing units) has accelerated slightly compared to the previous decade. Households had a greater growth rate than the population due to the population per household declining from 2.13 in 2020 to 2.11 in 2025.

TABLE 1
DEMOGRAPHIC TRENDS

	2010 Census	2020 Census	2025 Estimate	Change (2010-2020) Total	Change (2010-2020) Percent*	Change (2020-2025) Total	Change (2020-2025) Percent*
Population	220,818	237,534	246,433	16,716	0.7%	8,899	0.7%
Housing Units	121,622	129,648	134,964	8,026	0.6%	5,316	0.8%
Households	102,742	111,588	116,548	8,846	0.8%	4,960	0.9%
Population Per	2.15	2.13	2.11	-0.02	-0.1%	-0.01	-0.1%

Sources: U.S. Bureau of the Census, 2010 and 2020; American Community Survey, 2023; Applied Economics, 2025.
* Compound annual rate of change.

The White share of the population has decreased by about 6 percent since 2010, now accounting for 78 percent of the population, as shown in **Table 2**. Between 2010 and 2025, the Hispanic share of the population has increased by nearly 2 percent. Combined, the White and Hispanic residents of the District account for almost 90 percent of the total District population. Since 2020, the Asian population has experienced the strongest growth in both percentage and number. Due to this growth, their share of the population has increased by about 1 percent since 2020.

TABLE 2
DEMOGRAPHIC TRENDS – RACE & ETHNICITY

	2010 Census	2020 Census	2025 Estimate	Change (2010-2020) Total	Change (2010-2020) Percent*	Change (2020-2025) Total	Change (2020-2025) Percent*
Population	220,818	237,534	246,433	16,716	0.7%	8,899	0.7%
By Race & Ethnicity:							
White	84.1%	80.5%	78.0%	5,529	0.3%	960	0.1%
African American	1.7%	2.0%	2.3%	1,078	2.5%	697	2.7%
Native American	0.8%	0.8%	0.8%	70	0.4%	62	0.7%
Asian	3.4%	5.4%	6.6%	5,183	5.3%	3,592	5.1%
Hispanic	9.9%	10.9%	11.5%	4,068	1.7%	2,560	1.9%
Other	0.1%	0.4%	0.8%	789	14.5%	1,030	14.5%

Sources: U.S. Bureau of the Census, 2010 and 2020; American Community Survey, 2023; Applied Economics, 2025.
* Compound annual rate of change.

The demographic data indicates a general aging of the population since 2010, which directly impacts District enrollment (**Table 3**). Of particular interest is the decline in the three youngest age cohorts (persons under 18 years of age), which has persisted since 2010. Combined, these three cohorts now account for about 15 percent of the total population, down from 18 percent in 2010. Between 2010 and 2020 strong growth occurred in the 65 and Up age group. This trend has continued over the past five years, and this cohort now accounts for almost 24 percent of the total population, up from 19 percent in 2010.

TABLE 3
DEMOGRAPHIC TRENDS – AGE

	2010 Census	2020 Census	2025 Estimate	Change (2010-2020) Total	Change (2010-2020) Percent*	Change (2020-2025) Total	Change (2020-2025) Percent*
Population	220,818	237,534	246,433	16,716	0.7%	8,899	0.7%
By Age:							
Under 5	4.3%	3.8%	3.7%	-538	-0.6%	-25	-0.1%
5 to 13	9.4%	7.7%	7.0%	-2,445	-1.2%	-984	-1.1%
14 to 17	4.7%	4.3%	3.9%	-224	-0.2%	-611	-1.2%
18 to 24	7.4%	7.2%	7.1%	685	0.4%	445	0.5%
25 to 44	25.6%	26.7%	27.5%	6,900	1.2%	4,342	1.3%
45 to 64	29.7%	28.3%	27.2%	1,721	0.3%	-207	-0.1%
65 and up	18.9%	22.0%	23.6%	10,617	2.3%	5,940	2.2%

Sources: U.S. Bureau of the Census, 2010 and 2020; American Community Survey, 2023; Applied Economics, 2025.
* Compound annual rate of change.

Since 2010, over 13,340 new units have been added to the District's inventory and the average annual rate of growth has increased slightly over the past five years (**Table 4**). Occupancy rates are up slightly since 2010 but have stabilized at 86 percent since 2020. About 75 percent of the units added in since 2010 have been multifamily, and it is estimated that the share of multifamily units has now surpassed the share of single family units in the District. The implication for District enrollment is that rental units tend to have higher turnover rates. This trend can serve to stabilize the age structure of the student population since these households tend be replaced by new households with similar characteristics, rather than aging in place. A greater proportion of owner-occupied units will typically increase the student population in the near-term, but it will then decrease over time until the neighborhood begins to regenerate.

TABLE 4
DEMOGRAPHIC TRENDS – HOUSING UNITS

	2010 Census	2020 Census	2025 Estimate	Change (2010-2020) Total	Change (2010-2020) Percent*	Change (2020-2025) Total	Change (2020-2025) Percent*
Housing Units	121,622	129,648	134,964	8,026	0.6%	5,316	0.8%
Occupied	84.5%	86.1%	86.4%	8,846	0.8%	4,960	0.9%
Owner	55.9%	55.8%	54.2%	4,396	0.6%	788	0.2%
Renter	28.6%	30.3%	32.2%	4,450	1.2%	4,172	2.0%
Vacant	15.5%	13.9%	13.6%	-820	-0.4%	356	0.4%
By Unit Type:							
Single Family	52.2%	50.6%	49.4%	2,090	0.3%	1,149	0.3%
Multifamily	47.8%	49.4%	50.6%	5,954	1.0%	4,168	1.3%

Sources: U.S. Bureau of the Census, 2010 and 2020; American Community Survey, 2023; Applied Economics, 2025.
* Compound annual rate of change.

The distribution of households by age (**Table 5**) can be an indicator of future student enrollment. As such, it is important to note that there has been a slight aging of the householder population since 2010. The share of householders aged 35 to 44, which drive older elementary-age enrollment, has declined slightly from 16 percent in 2010 to 15 percent in 2025. The share of householders aged 45 to 54, which typically drive high school enrollment, has declined by about 4 percent since 2010 and is now at about 16 percent of the District population. The share of householders 65 and older has increased from 27 percent in 2010 to over 32 percent in 2025. Household size has declined from 2.15 in 2010 to 2.11 in 2025. This trend can be attributed to the increase in multifamily units and the overall aging of the existing District population.

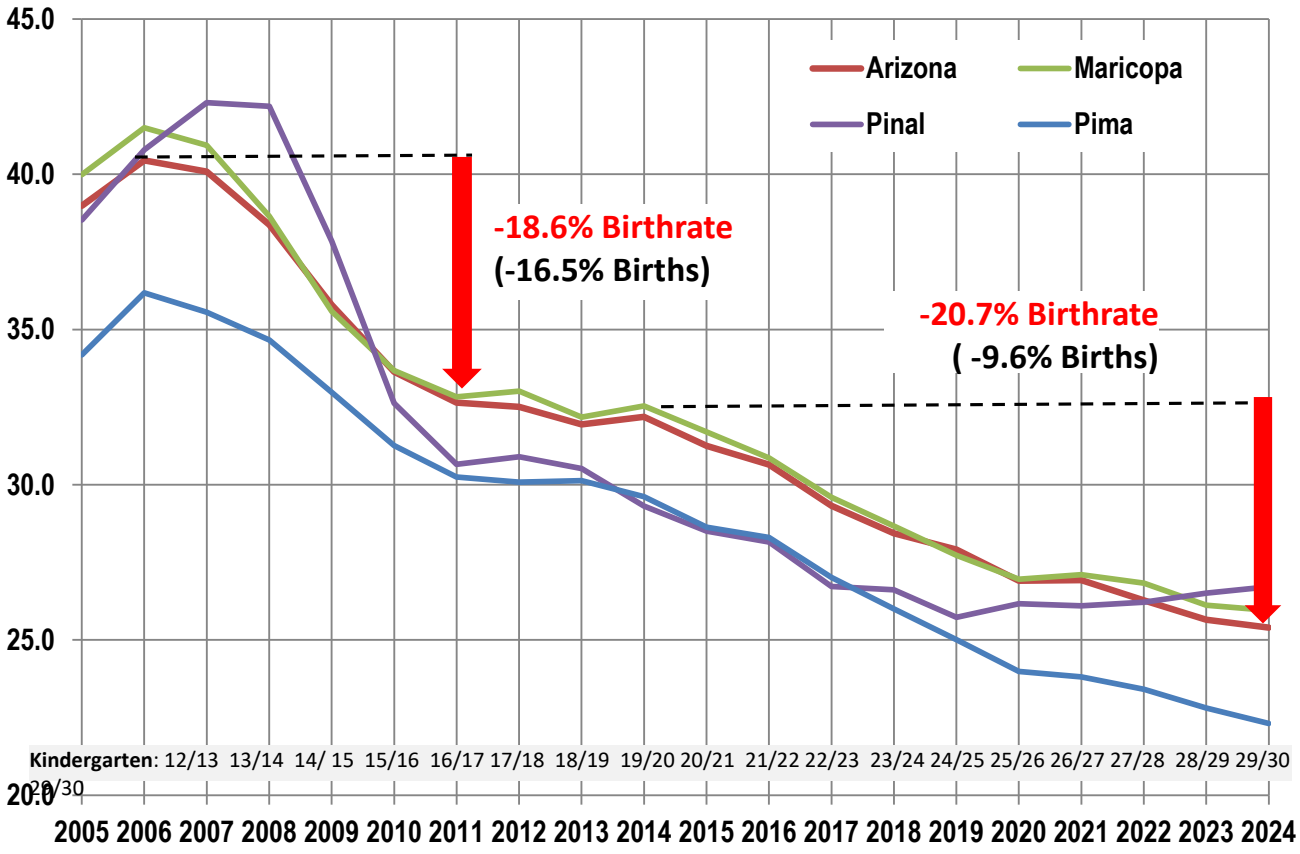
TABLE 5
DEMOGRAPHIC TRENDS – HOUSEHOLDS

	2010 Census	2020 Census	2025 Estimate	Change (2010-2020) Total	Change (2010-2020) Percent*	Change (2020-2025) Total	Change (2020-2025) Percent*
Households	102,742	111,588	116,548	8,846	0.8%	4,960	0.9%
Householders by Age							
15 to 24	4.2%	3.2%	3.1%	-713	-1.8%	42	0.2%
25 to 34	14.5%	15.3%	15.1%	2,256	1.4%	502	0.6%
35 to 44	15.8%	15.6%	15.1%	1,199	0.7%	217	0.2%
45 to 54	20.0%	16.1%	15.7%	-2,537	-1.3%	317	0.3%
55 to 64	18.3%	19.7%	18.6%	3,181	1.6%	-317	-0.3%
65 to 74	13.3%	15.4%	16.5%	3,485	2.3%	2,080	2.3%
75 and up	13.9%	14.6%	15.8%	1,976	1.3%	2,120	2.5%
Owners By Age:							
15 to 24	0.6%	0.2%	0.2%	-340	-7.8%	2	0.2%
25 to 34	5.0%	5.5%	5.0%	999	1.8%	-330	-1.1%
35 to 44	9.4%	8.6%	7.9%	-95	-0.1%	-385	-0.8%
45 to 54	14.4%	11.2%	10.3%	-2,328	-1.7%	-536	-0.9%
55 to 64	14.6%	15.8%	14.2%	2,621	1.6%	-1,009	-1.2%
65 to 74	11.3%	12.2%	13.0%	1,938	1.6%	1,568	2.2%
75 and up	10.8%	11.4%	12.2%	1,600	1.4%	1,477	2.2%
Renters By Age:							
15 to 24	3.6%	3.0%	2.9%	-374	-1.1%	39	0.2%
25 to 34	9.5%	9.9%	10.2%	1,257	1.2%	831	1.5%
35 to 44	6.4%	7.0%	7.2%	1,294	1.8%	602	1.5%
45 to 54	5.6%	4.9%	5.5%	-208	-0.4%	854	2.9%
55 to 64	3.8%	4.0%	4.4%	559	1.4%	692	2.9%
65 to 74	2.0%	3.2%	3.5%	1,547	5.8%	511	2.7%
75 and up	3.1%	3.2%	3.6%	376	1.1%	643	3.4%
Population Per	2.15	2.13	2.11	-0.02	-0.1%	-0.01	-0.1%

Sources: U.S. Bureau of the Census, 2010 and 2020; American Community Survey, 2023; Applied Economics, 2025.
* Compound annual rate of change.

Another major factor affecting enrollment is the declining birth rate regionally and nationally. Arizona's birth rate (births per 1,000 for the population aged 15 to 45) declined by 18.6 percent between 2006 and 2011 due to the recession, as shown in **Figure 5**. During that period, the annual number of births statewide fell from 102,000 to 85,200. Between 2011 and 2014, the rate was fairly stable; but, since 2014, the birth rate has fallen by another 20.7 percent (through 2024), resulting in a total compound rate reduction of 39.3 percent since 2006.

FIGURE 5
BIRTH RATES IN ARIZONA AND SELECTED COUNTIES: 2005 – 2024
(Births per 1,000 people aged 15 to 45 years)



Sources: Arizona Department of Health Services; U.S. Census Bureau; Applied Economics, 2025.

The total number of births has declined less sharply since 2014 because the total population has increased. Births in Arizona dropped by 10 percent since 2014, down to 78,344 in 2024. In the last year, births increased by 0.7 percent in Arizona. Births also increased slightly in Maricopa County by 1.1 percent and in Pinal County by 4.5 percent in 2024. The impact of the declining birth rate on Kindergarten enrollment is delayed five years. As such, the statewide birthrate decline between 2006 and 2011 impacted kindergarten enrollment between 2012/13 and 2016/17. The overall decline in birth rates will likely negatively impact the size of incoming kindergarten classes through at least the 2029/30 school year.

2.3 Alternative Providers

In general, public school districts face competition for students from charter, private, and online/home schools, as well as from neighboring public school districts through open enrollment policies. As a result, when correlating household and school-age population changes with District enrollment, it is necessary to account for the share of the District's school-age population that may be served by other providers, including charter and private schools.

There are currently 12 charter schools operating within the District's boundaries, serving 5,700 K-12 students, and another five charter schools located just outside the District enroll nearly 1,500 K-12 students (**Table 6**). The BASIS schools enroll almost 1,500 students, while the Great Hearts Academies enroll about 3,440 students. These two providers capture nearly 87 percent of charter enrollment in in-District schools. Of the 7,164 charter students who attend charter schools in or near the District, only about half of the students actually reside in the District.

TABLE 6
ENROLLMENT IN LOCAL CHARTER SCHOOLS

School Name	Address	City	Zip	Grades	Total K-12**
In-District Schools:					
Accelerated Learning Center	4105 E. Shea Boulevard	Phoenix	85028	9th-12th	123
BASIS Scottsdale	10400 N.128th Street	Scottsdale	85259	5th-12th	1,037
BASIS Scottsdale Primary - East Campus	11440 N. 136th Street	Scottsdale	85259	K-4th	452
Great Hearts Academies - Archway Scottsdale	16648 N 94th Street	Scottsdale	85255	K-5th	1,066
Great Hearts Academies - Archway Veritas	3102 N. 56th Street	Phoenix	85018	K-5th	716
Great Hearts Academies - Scottsdale Prep	16537/16576 N. 92nd Street	Scottsdale	85260	6th-12th	889
Great Hearts Academies - Veritas Prep	3102 N. 56th Street	Phoenix	85018	6th-12th	764
Hirsch Academy: A Challenge Foundation Academy	6535 E. Osborn Road	Scottsdale	85251	K-6th	159
Mission Montessori Academy at St. Apkar	8849 E. Cholla Street	Scottsdale	85260	K	130
Mission Montessori Academy	11050 N. 96th Street	Scottsdale	85260	1st-5th	129
Montessori Academy	6050 N. Invergordon Road	Paradise Valley	85253	K-8th	83
Scottsdale Country Day School	10460 N. 56th Street	Scottsdale	85253	K-6th	127
Total					5,675
Nearby Schools*:					
Great Hearts Academies - Archway Cicero	7205 N. Pima Road	Scottsdale	85258	K-5th	436
Great Hearts Academies - Cicero Prep	7205 N. Pima Road	Scottsdale	85258	6th-12th	501
Noah Webster Schools - Pima	5399 N. Pima Road	Scottsdale	85250	K-6th	197
Ombudsman - Charter East	3943 E. Thomas Road	Phoenix	85018	9th-12th	215
Ombudsman - Charter East II	4041 E. Thomas Road	Phoenix	85018	9th-12th	140
Total					1,489
Total Charter					**7,164**

Source: Arizona Department of Education; Applied Economics 2025.
* Located within approximately one mile of District boundaries
**2025/26 September ADM Data

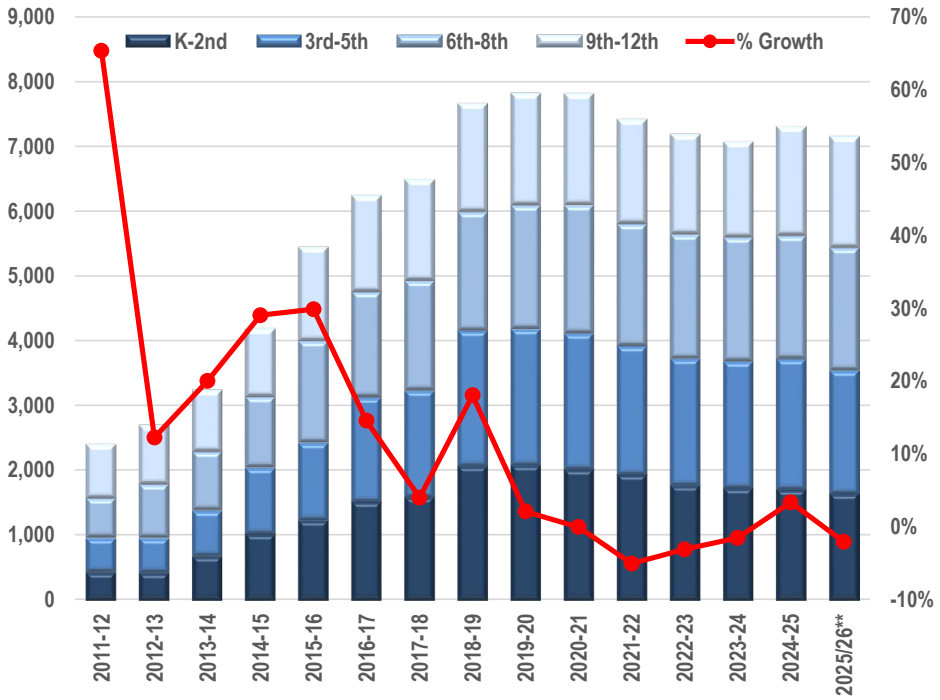
Since 2010/11, charter enrollment has increased by about 5,700 K-12 students (**Table 7 and Figure 6**). A significant shift in this trend began in 2019/20 when total charter enrollment increased by fewer than 200 students. With the closing of several smaller charter schools over the last few years, charter enrollment has declined by about 670 students since 2019/20. Of these 670 students, nearly 96 percent were K-5 students and 3 percent were 12th grade students.

TABLE 7
ENROLLMENT IN LOCAL CHARTER SCHOOLS BY GRADE

School Year	# of Schools	KG	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total K-12	Annual Change
2010-11	7	25	20	24	25	25	21	182	198	182	170	154	192	245	1,463	
2011-12	9	142	147	147	142	130	255	213	200	199	183	199	190	272	2,419	956
2012-13	9	144	144	140	146	132	257	321	249	257	183	197	231	314	2,715	296
2013-14	15	236	230	216	210	182	308	328	332	252	204	213	208	339	3,258	543
2014-15	18	356	339	324	333	299	393	404	379	313	188	262	259	355	4,203	945
2015-16	20	425	427	380	357	362	479	560	513	499	306	322	369	460	5,458	1,255
2016-17	20	499	503	515	481	503	626	617	511	502	333	350	322	490	6,252	794
2017-18	20	499	548	541	528	494	619	630	569	501	373	362	374	462	6,500	248
2018-19	20	658	689	712	714	701	678	671	613	554	387	375	395	525	7,672	1,172
2019-20	21	712	687	674	690	655	761	696	629	588	408	409	405	517	7,831	159
2020-21	19	648	696	667	674	662	763	743	623	620	379	388	402	560	7,825	(6)
2021-22	18	633	625	670	624	637	725	706	612	574	395	356	372	498	7,427	(398)
2022-23	17	538	617	609	659	612	688	716	631	575	363	361	332	493	7,194	(233)
2023-24	17	524	568	632	621	653	679	655	642	623	370	321	371	422	7,082	(112)
2024-25	17	557	560	585	659	633	725	676	605	622	431	370	362	532	7,317	235
2025-26*	17	497	569	572	586	648	667	691	628	580	394	428	407	497	7,164	(153)

Source: Arizona Department of Education; Applied Economics 2025.
*2025/26 September ADM Data

FIGURE 6
TOTAL LOCAL CHARTER ENROLLMENT BY GRADE COHORT



Source: Arizona Department of Education; Applied Economics 2025
**2025/26 September ADM Data

Charter schools can be found throughout the District but they are often located in close proximity to major transportation corridors and in established areas with higher population densities, as shown in **Map 5**. Students living in the District are not limited to attending schools located within the District and vice-versa, resulting in a complex flow of incoming and outgoing students that impacts all areas of the District to some degree. In addition, the District attracts a large number of students from neighboring districts who may be more likely to move to a charter school since they already provide their own transportation.

MAP 5
AREA CHARTER SCHOOLS

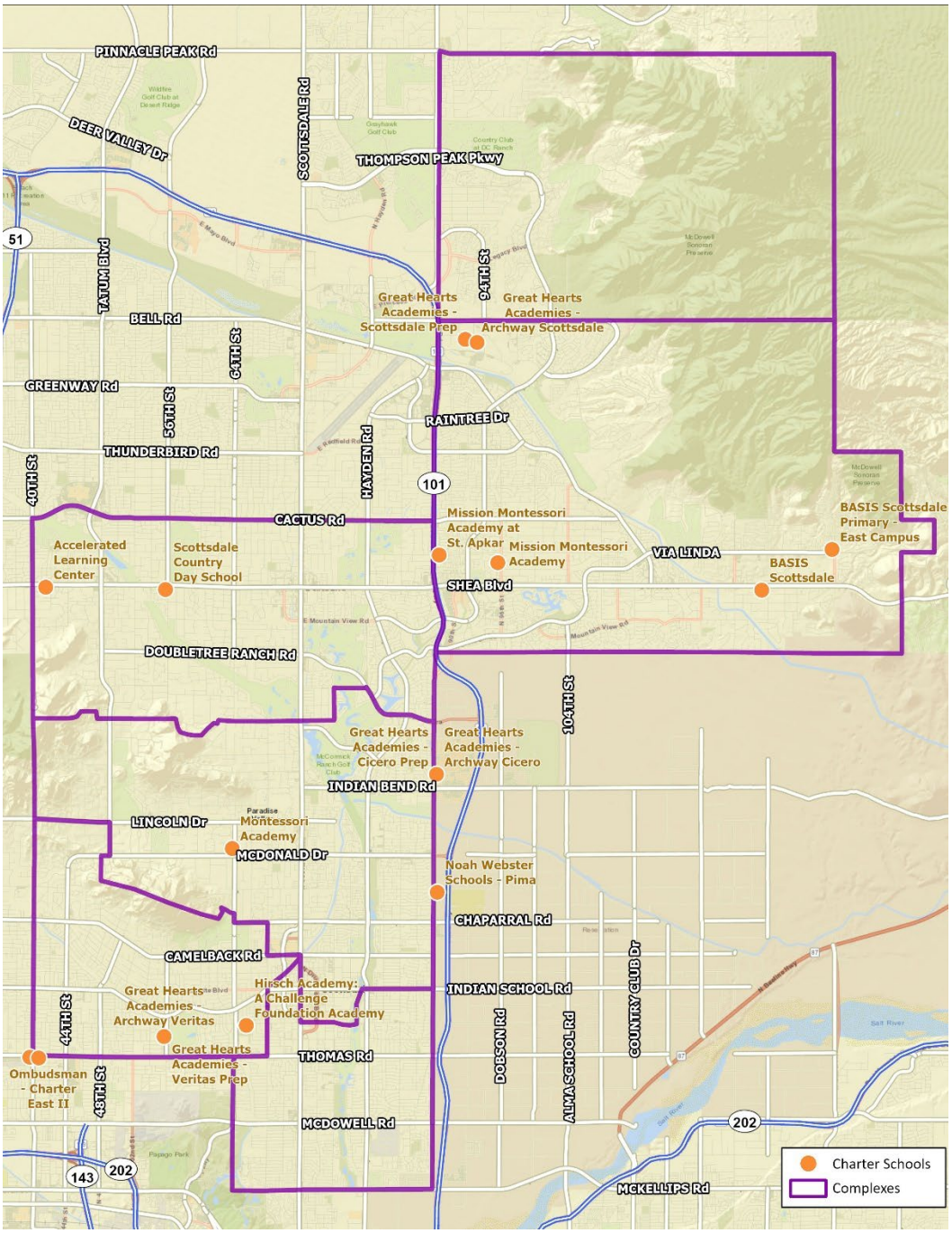


Table 8 shows the public alternative providers with the highest average daily membership (ADM) of students living in the District during the 2024/25 school year, offering a more precise estimate of how many students are being drawn away from the District toward charter schools and neighboring school districts. Among the top 25 alternative providers, 18 were charter schools. The largest alternative provider is the BASIS charter schools, followed by the Paradise Valley Unified District. In total, the ADM for all students in the District was 19,692 students. Of these, the District retained about 75 percent. The remaining 25 percent, or about 5,000 students, are being served by other providers. The complete list of alternative providers can be found on the Arizona Department of Education website.

TABLE 8
TOP PUBLIC ALTERNATIVE PROVIDERS OF DISTRICT STUDENTS: 2024/25

Provider	Type	ADM
BASIS Charter Schools, Inc.	Charter	1,061
Paradise Valley Unified District	District	568
Archway Classical Academy Scottsdale	Charter	417
Veritas Preparatory Academy	Charter	392
Scottsdale Preparatory Academy	Charter	356
Archway Classical Academy Veritas	Charter	327
Cicero Preparatory Academy	Charter	306
Archway Classical Academy Cicero	Charter	242
ASU Preparatory Academy Digital	Charter	132
Hirsch Academy A Challenge Foundation	Charter	86
American Virtual Academy	Charter	78
Villa Montessori Charter School	Charter	77
Tempe School District	District	55
Ombudsman Educational Services, Ltd.,a subsidiary of Educational Services of Ame	Charter	47
Montessori Academy, Inc.	Charter	46
Madison Elementary District	District	41
GAR, LLC dba Student Choice High School	Charter	40
Creighton Elementary District	District	33
Tempe Union High School District	District	33
Arizona School For The Arts	Charter	31
Noah Webster Schools-Pima	Charter	30
Scottsdale Country Day School	Charter	28
Arizona Connections Academy Charter School, Inc.	Charter	27
Mesa Unified District	District	26
Phoenix Union High School District	District	25

Source: Arizona Department of Education; Applied Economics 2025.

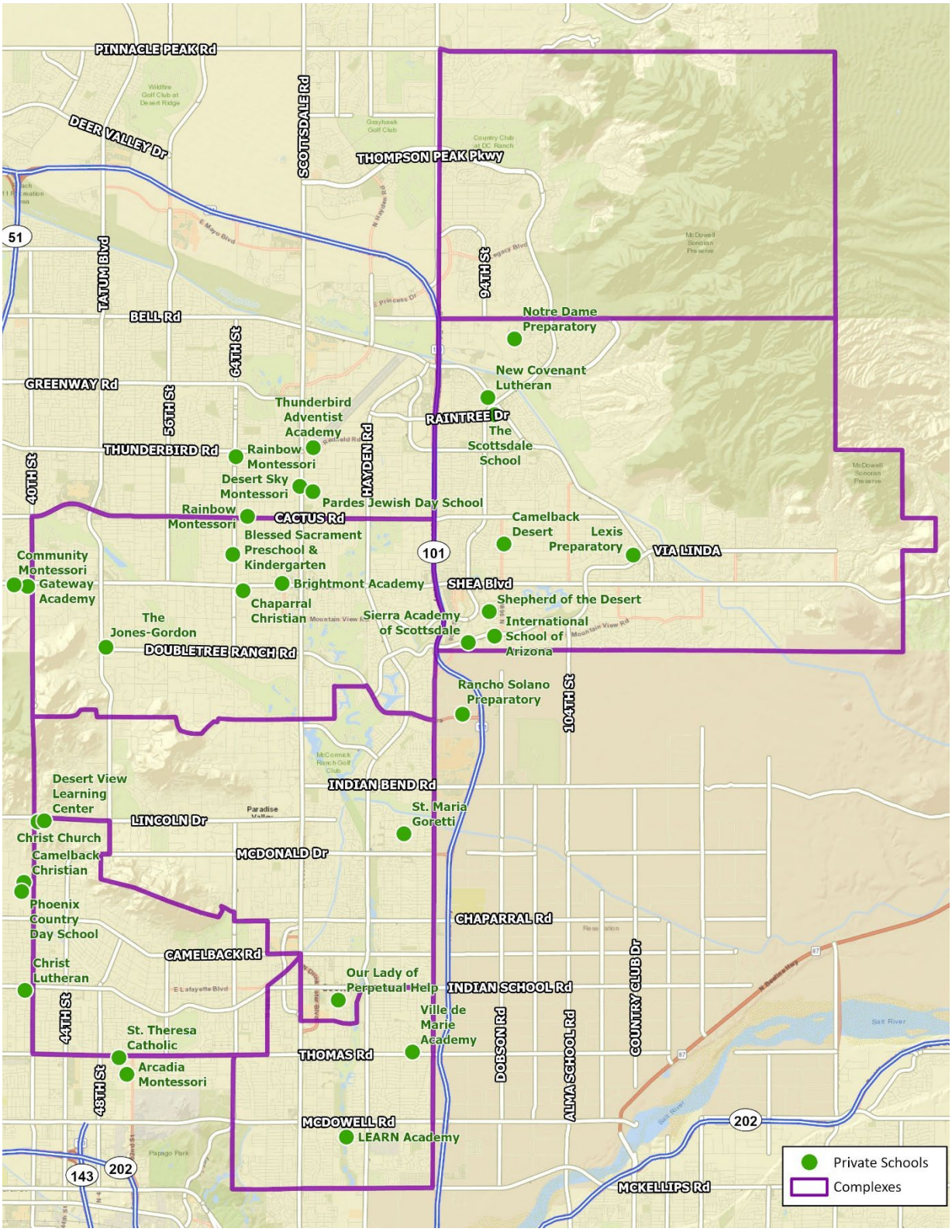
Private schools do not have the same reporting requirements as charter entities, so enrollment data is often less accessible. However, the schools tend to have more stable enrollment than charter schools. As of the 2023/24 school year, 26 private schools were operating in the District, serving about 4,830 students, and an additional six private schools were operating near the District, serving about 250 students. Altogether, these schools enroll about 5,080 K-12 students **(Table 9 and Map 6)**. Once again, it is important to note that not all of the students enrolled at these schools actually live in the District, but unlike the charter school data, the students who live in the District cannot be quantified.

TABLE 9
ENROLLMENT IN LOCAL PRIVATE SCHOOLS

School Name	Address	City	Zip	Grades	Total K-12
In-District Schools:					
Blessed Sacrament Preschool & Kindergarten	11300 N. 64th Street	Scottsdale	85254	K	10
Brightmont Academy	6990 E. Shea Boulevard	Scottsdale	85254	1-12th	82
Camelback Christian School	3900 E. Stanford Drive	Paradise Valley	85253	K	10
Camelback Desert School	9606 E. Kalil Drive	Scottsdale	85260	K	15
Chaparral Christian Community Schools	6451 E. Shea Boulevard	Scottsdale	85254	K-6th	39
Christ Church School	4015 E. Lincoln Drive	Paradise Valley	85253	K-3rd	46
Christ Lutheran School	3901 E. Indian School Road	Phoenix	85018	K-8th	492
Desert Sky Montessori	12850 N. Scottsdale Road	Scottsdale	85254	K	9
Desert View Learning Center	4027 E. Lincoln Drive	Paradise Valley	85253	K-4th	98
Gateway Academy	3939 E. Shea Bloulevard	Phoenix	85028	6-12th	107
International School of Arizona	9522 E. San Salvador Drive	Scottsdale	85258	K-8th	213
LEARN Academy	1250 N 77th St	Scottsdale	85257	1-12th	41
Lexis Preparatory School	11130 E. Cholla Street	Scottsdale	85259	1st-12th	81
New Covenant Lutheran Church Children's Ministry	15152 N. Frank Lloyd Wright Blvd.	Scottsdale	85260	K	27
Notre Dame Preparatory	9701 E. Bell Road	Scottsdale	85260	9th-12th	975
Our Lady of Perpetual Help School	3801 N. Miller Road	Scottsdale	85251	K-8th	292
Pardes Jewish Day School	12753 N. Scottsdale Road	Scottsdale	85254	K-8th	293
Phoenix Country Day School	3901 E. Stanford Drive	Paradise Valley	85253	K-12th	730
Rancho Solano Preparatory School	9180 E. Via De Ventura	Scottsdale	85258	6th-12th	429
Shepherd of the Desert Lutheran School	9400 E. Mountain View Road	Scottsdale	85258	K	30
Sierra Academy of Scottsdale	9128 E. San Salvador Drive	Scottsdale	85258	K-12th	24
St. Maria Goretti Preschool and Kindergarten	6261 N. Granite Reef Road	Scottsdale	85250	K	31
St. Theresa Catholic School	5001 E. Thomas Road	Phoenix	85018	K-8th	331
The Jones-Gordon School	4800 E Doubletree Ranch Rd	Paradise Valley	85253	1-12th	166
The Scottsdale School	14684 N. Frank Lloyd Wright Blvd.	Scottsdale	85260	K	33
Ville de Marie Academy	8524 E. Thomas Road	Scottsdale	85251	K-12th	229
Nearby Schools:					
Arcadia Montessori School	5115 E. Virginia Avenue	Phoenix	85008	K	7
Community Montessori School	3737 E. Shea Boulevard	Phoenix	85028	K	6
Rainbow Montessori School - Cactus	6520 E. Cactus Road	Scottsdale	85254	K	1
Rainbow Montessori School - Voltaire	6402 E. Voltaire Avenue	Scottsdale	85254	K	10
Thunderbird Adventist Academy	7410 E. Sutton Drive	Scottsdale	85260	9th-12th	131
Thunderbird Christian Elementary School	7440 E. Sutton Drive	Scottsdale	85260	K-8th	96
Total Private					**5,084**

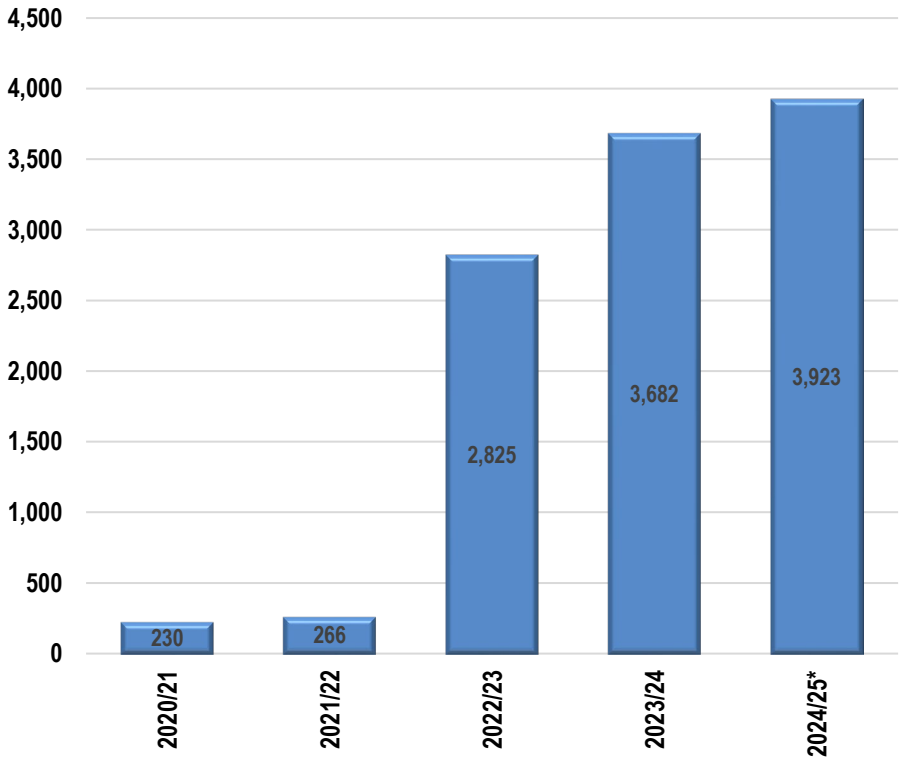
Source: NCES Private School Universe Survey, 2023-24 school year data; PrivateSchoolReview.com, 2025; Applied Economics 2025.

MAP 6
LOCAL PRIVATE SCHOOLS



Changes to eligibility requirements for the Empowerment Scholarship Account (ESA) program over the past several years are impacting enrollment at both district and charter schools. Since ESA eligibility expanded in 2022, the number of students participating in this program has increased significantly statewide. The number of students living in the District and participating in the ESA program increased from about 230 students in 2020/21 to about 3,920 in 2024/25 (**Figure 7**). In the first year, 79 percent of the new recipients in Arizona were already attending a private school, so the impact on District enrollment was relatively small. However, starting in 2023/24, the share of students receiving a new ESA and previously attending a district school rose to 48 percent.

FIGURE 7
DISTRICT STUDENTS WITH ENROLLMENT SCHOLARSHIP ACCOUNTS



Source: Arizona Department of Education; Applied Economics 2025.
*Estimate based on zip code data

3.0 Residential Development

3.1 Market Conditions

The overall economic conditions in Arizona and the metropolitan regions of the Sun Corridor remain positive, though somewhat sluggish. Employment levels have remained fairly stable, though job growth in the state has declined, as it has nationally. Slow economic growth is expected for at least the remainder of 2025, but the outlook is unusually uncertain. There is a risk of an economic downturn, but if that is avoided, more typical growth levels are forecast for 2026.

The population continues to grow, as shown in **Table 10**, with some slowing in 2024 in Maricopa County, and more noticeable deceleration in Pima and Yavapai Counties starting in 2023, but accelerating growth in Pinal County. Population is correlated with jobs, and past employment growth has been solid, especially in Maricopa and Pinal counties, with notable increases in manufacturing and high-tech jobs. While there are still geographic nodes of employment concentration, job growth has occurred throughout the metro area, with improved transportation corridors connecting jobs and housing.

TABLE 10
POPULATION GROWTH IN THE SUN CORRIDOR

Population	2005	2010	2015	2020	2021	2022	2023	2024
Maricopa County	3,577,074	3,824,083	4,076,400	4,436,704	4,507,419	4,586,431	4,665,020	4,726,247
Pima County	940,004	981,015	1,005,920	1,045,589	1,058,318	1,072,298	1,080,300	1,086,634
Pinal County	250,195	375,541	387,993	428,220	439,128	453,924	467,459	483,944
Yavapai County	196,629	210,919	218,182	237,073	241,173	245,389	248,899	251,768
Arizona	5,924,476	6,398,985	6,701,021	7,176,401	7,285,370	7,409,189	7,525,113	7,621,703
Average Annual Change	**2000-2005**	**2005-2010**	**2010-2015**	**2015-2020**	**2021**	**2022**	**2023**	**2024**
Maricopa County	96,829	49,402	50,463	72,061	70,715	79,012	78,589	61,227
Pima County	18,326	8,202	4,981	7,934	12,729	13,980	8,002	6,334
Pinal County	13,552	25,069	2,490	8,045	10,908	14,796	13,535	16,485
Yavapai County	5,422	2,858	1,453	3,778	4,100	4,216	3,510	2,869
Arizona	149,779	94,902	60,407	95,076	108,969	123,819	115,924	96,590

Source: Arizona Office of Economic Opportunity; Applied Economics, 2025.

Within the Phoenix metro area, the strongest population gains have been in the outer suburbs or exurbs, including Maricopa, Casa Grande, and the San Tan Valley in Pinal County, and in the southwest and northwest suburbs, including Buckeye, Goodyear, and Surprise. Factors common to these areas include employment growth, land availability, and housing affordability, at least relative to the older and more central parts of the region. Earlier growth centers such as the southeast Valley or north Valley are largely built out, or have limited remaining availability of land due to constraints of topography or ownership.

Large tracts of State land remain available for future development, but the time and financial requirements involved to protect the taxpayers also limit the number of developers realistically able to purchase, and slows the start of construction. This tends to result in large master planned projects, but not necessarily affordable ones. The price of land is a major factor in housing costs, which is a reason for growth shifting to areas like San Tan Valley, West Valley, or Maricopa, which can be opened up more quickly.

Inventory data for the metro area in **Table 11** shows a general softening in new listings and increasing supply, though still less than the 5 to 6 months considered to be a balanced market. When the COVID-19 pandemic stalled the economy in 2020/2021, mortgage rates fell to 3 percent or lower, housing demand surged, and purchase-resales by investors drove up prices. Although house prices have come down from the levels reached by the spring of 2022, they remain daunting for many, especially young families with children.

TABLE 11
SINGLE-FAMILY HOMES – KEY MONTHLY METRICS

		New Listings - June			Inventory for Sale - June			Months Supply - June		
Area	Population	2024	2025	Change	2024	2025	Change	2024	2025	Change
Maricopa County	4,726,247	5,030	4,751	-5.5%	11,423	16,251	42.3%	3.1	4.3	38.7%
Buckeye	113,349	308	276	-10.4%	743	963	29.6%	3.7	4.7	27.0%
Goodyear	116,694	202	208	3.0%	488	679	39.1%	3.8	4.2	10.5%
Mesa	524,892	525	456	-13.1%	893	1,336	49.6%	2.4	3.7	54.2%
Peoria	203,065	254	237	-6.7%	564	889	57.6%	3.1	4.5	45.2%
Phoenix	1,697,696	1,106	1,082	-2.2%	2,242	3,322	48.2%	2.8	4.2	50.0%
Queen Creek	68,109	168	156	-7.1%	540	654	21.1%	4.3	5.0	16.3%
Pinal County	483,944	949	968	2.0%	2,479	3,262	31.6%	3.7	4.6	24.3%
Casa Grande	65,883	135	104	-23.0%	409	408	-0.2%	3.8	4.5	18.4%
Maricopa	73,300	233	199	-14.6%	566	747	32.0%	3.7	5.0	35.1%
San Tan Valley	106,200	268	278	3.7%	599	807	34.7%	3.5	3.8	8.6%

Source: AZ Office of Economic Opportunity; World Population Review, Phoenix Realtors, July 2025

The lack of supply has been a persistent problem for several years. Many people purchased or refinanced houses during a period of abnormally low interest rates, and those owners have little motivation at this time to move when that would entail taking on a new purchase at a higher cost and a higher interest rate, sometimes called the "lock-in effect". Another factor is that institutional investors have been major housing purchasers in Arizona the last few years, which has resulted in more rentals and fewer houses available for purchase, which also abets higher prices.

Traditionally, new houses are priced well above existing houses. But by mid-2025, new houses were only about 10 percent higher in price than existing ones. Supply shortages have driven up existing house prices. Large builders increased their market share, and use large land purchases and economies of scale to restrain their cost increases, and use incentives to drive purchases. Those builders tend to be most active on large land parcels, which are typically located in the outer suburbs. The increased cost of home ownership drives buyers to the outer suburbs or exurbs of the metro area with relatively more affordable options. Since the price of new housing has become comparable to existing properties, there is an added motivation to consider newer areas farther from the center of the metro area, particularly for younger householders, who often want newer, technology-oriented houses. The data on **Table 12** shows some modest price decreases and increasing days on market. The national average is 50 days on market. This indicates a softer market.

TABLE 12
SINGLE-FAMILY HOMES – KEY YEAR-TO-DATE METRICS

	Closed Sales - YTD			Days on Market - YTD			Median Sales Price - YTD		
Area	Thru 6/24	Thru 6/25	Change	Thru 6/24	Thru 6/25	Change	Thru 6/24	Thru 6/25	Change
Maricopa County	24,131	24,847	3.0%	61	70	14.8%	$ 510,000	$ 514,000	0.8%
Buckeye	1,304	1,327	1.8%	69	80	15.9%	$ 402,285	$ 410,000	1.9%
Goodyear	829	1,118	34.9%	70	72	2.9%	$ 485,000	$ 476,921	-1.7%
Mesa	2,513	2,434	-3.1%	54	66	22.2%	$ 490,000	$ 489,000	-0.2%
Peoria	1,198	1,271	6.1%	58	68	17.2%	$ 535,000	$ 539,000	0.7%
Phoenix	5,154	5,210	1.1%	54	63	16.7%	$ 490,000	$ 489,000	-0.2%
Queen Creek	805	850	5.6%	83	84	1.2%	$ 649,995	$ 664,495	2.2%
Pinal County	4,300	4,556	6.0%	74	80	8.1%	$ 378,080	$ 382,907	1.3%
Casa Grande	632	531	-16.0%	81	83	2.5%	$ 336,000	$ 335,000	-0.3%
Maricopa	966	928	-3.9%	80	87	8.7%	$ 355,990	$ 355,000	-0.3%
San Tan Valley	1,129	1,368	21.2%	65	72	10.8%	$ 425,000	$ 420,000	-1.2%

Source: Phoenix Realtors, July 2025

During 2025/26, new construction is expected to continue to be strongest in the outer suburbs, with ongoing projects joined by new or expanding master plans near Apache Junction and Tonopah. Planning is moving forward for major development areas across north Phoenix. The average age-profile in these projects will vary, but all will have a mixture of housing types and households. The slowly increasing supply will help lower prices over time for existing houses. Home builders are still utilizing financial incentives, smaller units and lot sizes, and bringing down construction times to lower new home prices. This helps level the market and broadens the options for buyers.

Recent decisions regarding groundwater transfers from rural land to active management areas in Maricopa and Pinal Counties will help expand the amount of land available for housing development. New transportation improvements in all parts of the metro area, announced mid-2025, will improve accessibility between housing and employment centers. These will have mid- to long-term effects on the regional market.

Affordability is the major impediment to residential growth at this time. While there is movement to address some of the factors, economic uncertainty is a leading problem, and that is largely driven by U.S. tariffs and the unpredictable nature of those policies. It will likely be several quarters before the market becomes more stable.

3.2 Housing Construction

The 11,104 District housing units permitted over the past decade are shown on **Table 13**. Categories by density and type are used to associate new construction to the age structure of the households likely to occupy the units. 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 fewer and older children. Student generation rates per housing unit are associated to the unit type, with exceptions made for specific projects. Group quarter facilities, such as nursing homes or dormitories, are not included as either retirement or multifamily housing.

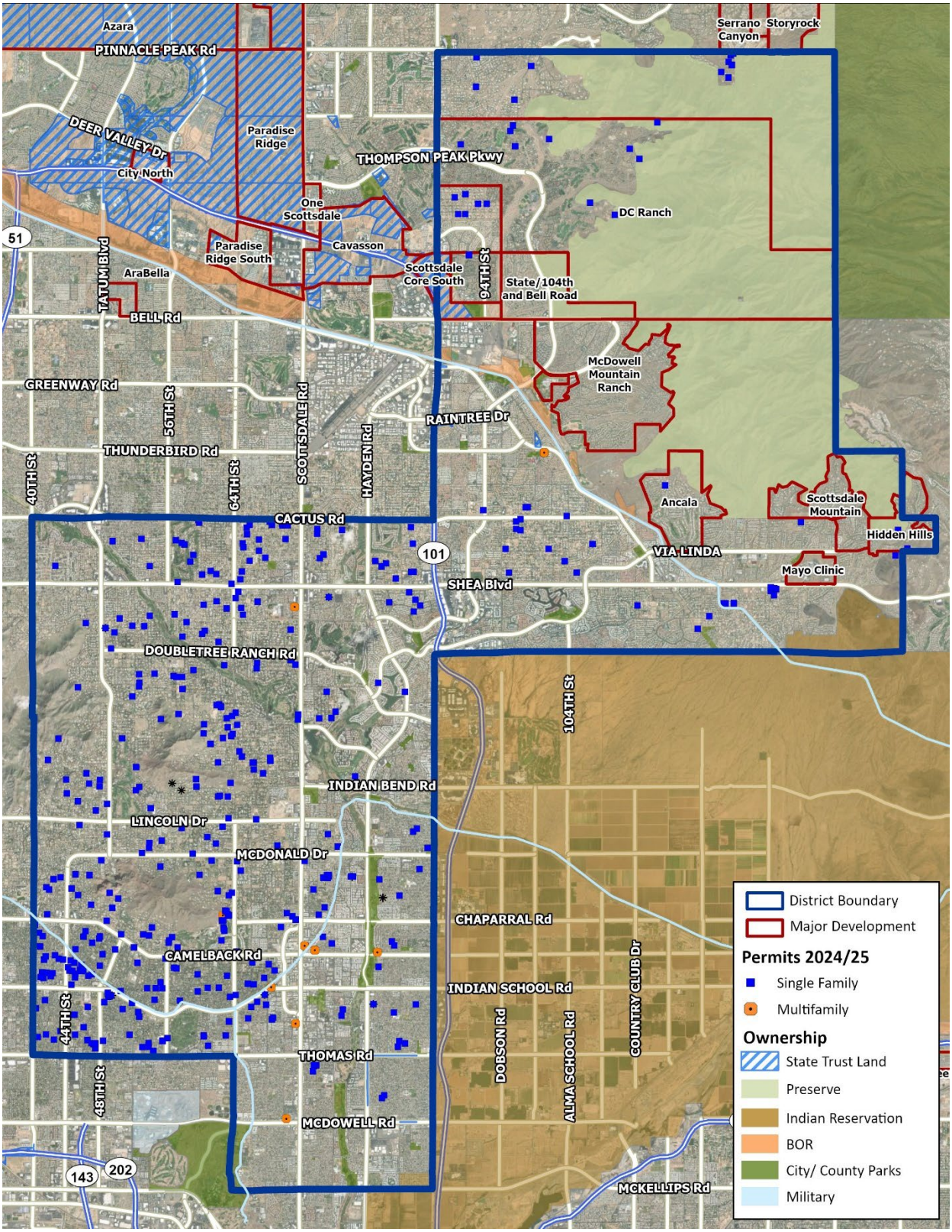
TABLE 13
HOUSING UNITS PERMITTED

Housing Type	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	Total
Family Housing											
Single Family 2 du/ac or less	201	75	172	235	150	99	130	135	159	209	1,565
Single Family 2.01 - 3.5 du/ac	12	26	13	12	24	37	95	32	25	54	330
Single Family 3.51 - 4.5 du/ac	75	21	86	69	57	1	62	52	97	89	609
Single Family 6.01du/ac & Over	-	5	50	40	67	-	-	-	-	-	162
Single Family Attached	-	-	10	15	15	10	10	10	5	6	81
Total Single Family	288	127	331	371	313	147	297	229	286	358	2,747
Condominium/Townhouse	32	51	74	91	73	40	116	4	49	4	534
Standard Courtyard Apts	26	(10)	574	-	120	1,532	828	-	-	-	3,070
Urban/Lifestyle Apts	347	17	82	305	645	1,024	299	-	26	-	2,745
Mid/High-rise Apts	-	-	356	185	146	-	-	-	-	190	877
Total Multifamily	405	58	1,086	581	984	2,596	1,243	4	75	194	7,226
Total Non-Age-Restricted	693	185	1,417	952	1,297	2,743	1,540	233	361	552	9,973
Age-Restricted Housing											
Standard Courtyard Apts	-	-	-	-	334	-	-	147	-	283	764
Urban/Lifestyle Apts	-	-	-	-	-	-	264	-	-	103	367
Total Age-restricted	-	-	-	-	334	-	264	147	-	386	1,131
Total	693	185	1,417	952	1,631	2,743	1,804	380	361	938	11,104

Sources: Construction Monitor; Maricopa County Assessor; Applied Economics, 2025.

Map 7 shows development activity in the District in 2024/25 with markers for individual building permits. The northern part of the District (east of Loop 101 and north of the reservation) is largely built out, and while there has been new activity in DC Ranch, most other single family permits are from redevelopment of existing housing units. The southern part of the District (west of Loop 101 and south of Cactus Rd) had significantly more single family permits, particularly in the southwestern portion of this area. The majority of multifamily development is in the southern part of the District as well, with the majority near Old Town.

MAP 7
RESIDENTIAL PERMITTING



3.3 Residential Development

3.3.1 Future Development Potential

Potential housing supply in the District is estimated at 16,144 units shown on **Table 14**, categorized by density and 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, or small custom projects. The number and type of units, and timing estimates will frequently be adjusted as new or more detailed information becomes available.

TABLE 14
POTENTIAL NEW HOUSING BY DEVELOPMENT TIMELINE

	Existing		Vacant Land					
Housing Type	Infill	Projects	1 Year	2-3 Years	3-5 Years	5-10 Years	10+ Years	Total
Family Housing								
Single Family 2 du/ac or less	1911	31	65	0	8	15	0	2,030
Single Family 3.51 - 4.5 du/ac	971	0	0	0	0	0	0	971
Single Family 6.01du/ac & Over	500	0	0	26	0	0	90	616
Total Single Family	3,382	31	65	26	8	15	90	3,617
Condominium/Townhouse	313	-	69	134	298	546	-	1,360
Standard Courtyard Apts	-	-	-	-	82	-	-	82
Urban/Lifestyle Apts	4,000	-	690	39	3,473	300	-	8,502
Mid/High-rise Apts	-	-	798	-	240	852	570	2,460
Total Multifamily	4,313	-	1,557	173	4,093	1,698	570	12,404
Total	7,695	31	1,622	199	4,101	1,713	660	16,021
Age-Restricted Housing								
Urban/Lifestyle Apts	-	123	-	-	-	-	-	123
Total Age-Restricted	-	123	-	-	-	-	-	123
Total	7,695	154	1,622	199	4,101	1,713	660	16,144

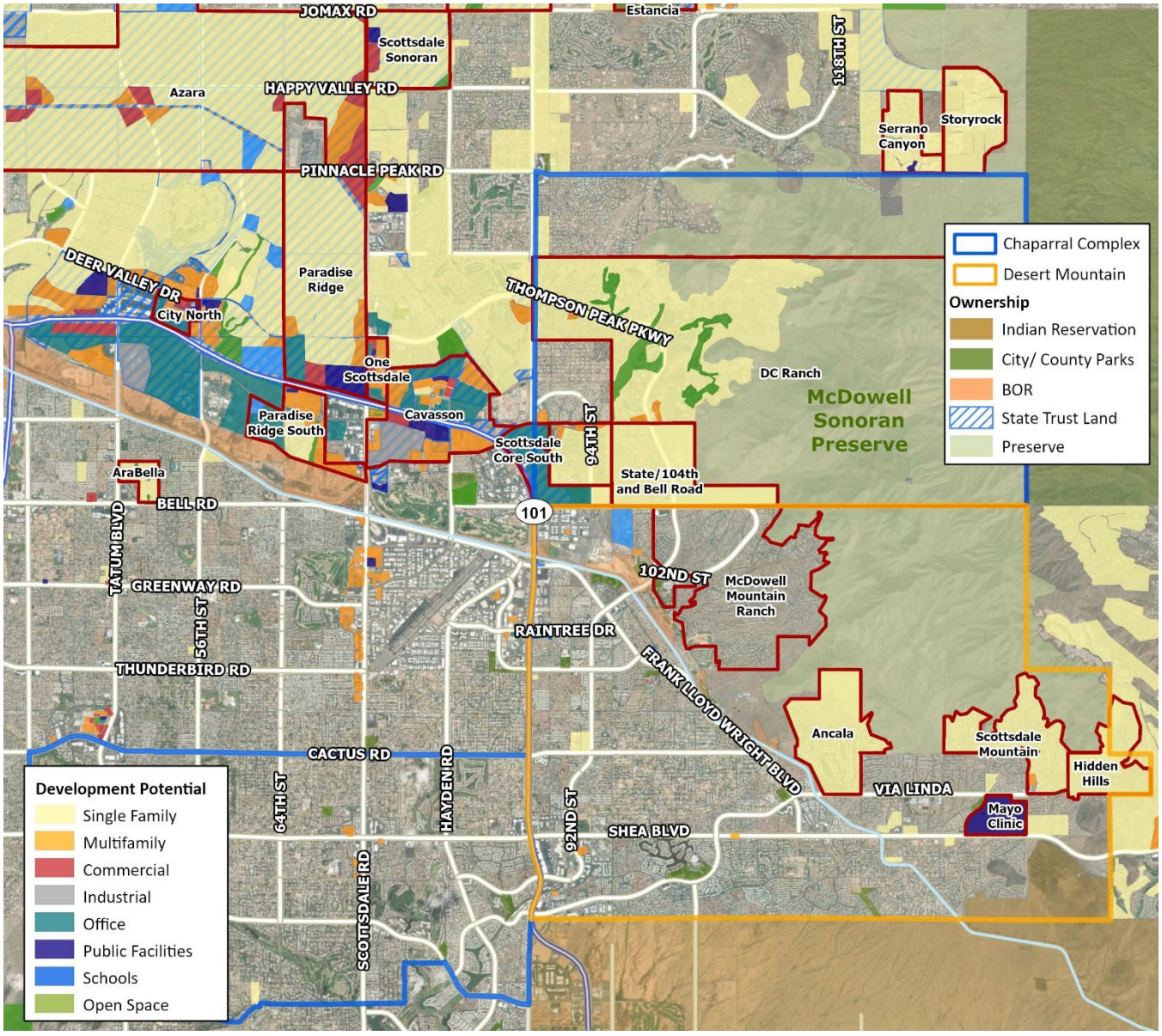
Sources: City of Scottsdale, Maricopa County; Applied Economics, 2025.

Future land use is illustrated in **Maps 8 and 9**. The northern part of the District has many subdivisions, particularly in the Desert Mountain and Chaparral North attendance areas. The majority of multifamily land in this part of the District is concentrated around Shea Blvd. In the southern part of the District, single family land is scattered; the farther north in this part of the District, the lower density the houses become, particularly around Camelback Mountain. There is a high concentration of multifamily land along Scottsdale Rd and south of Chaparral Rd.

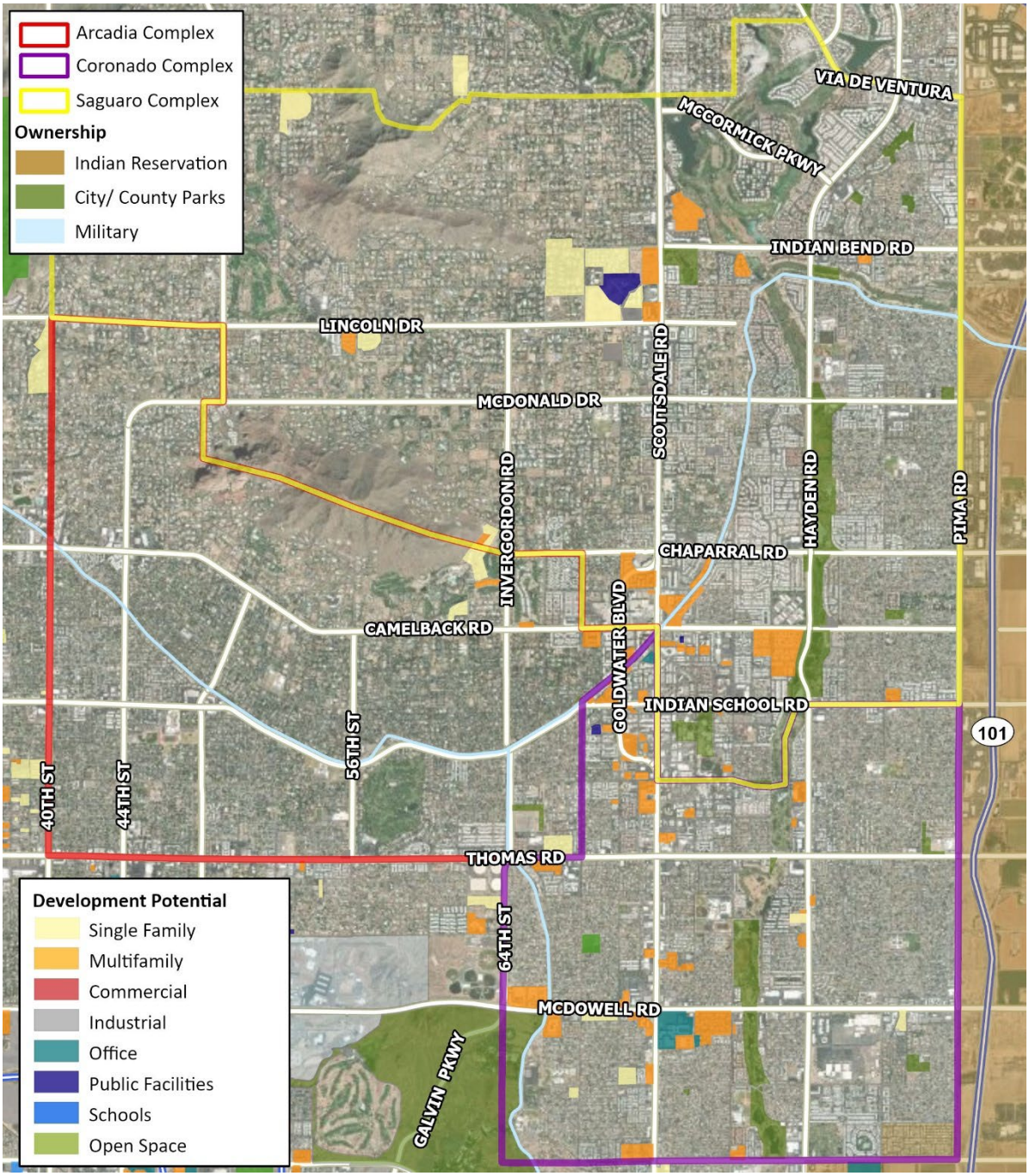
Development timing is illustrated in **Maps 10 and 11**. The northern part of the District is largely infill, but there are a few planned multifamily developments along Shea Blvd that could occur in the next 10 years. In the southern part of the District, there are a few active projects and projects that could start within a year, but many developments are held up waiting for approval from the Development Review Board.

MAP 8

FUTURE LAND USE – NORTH

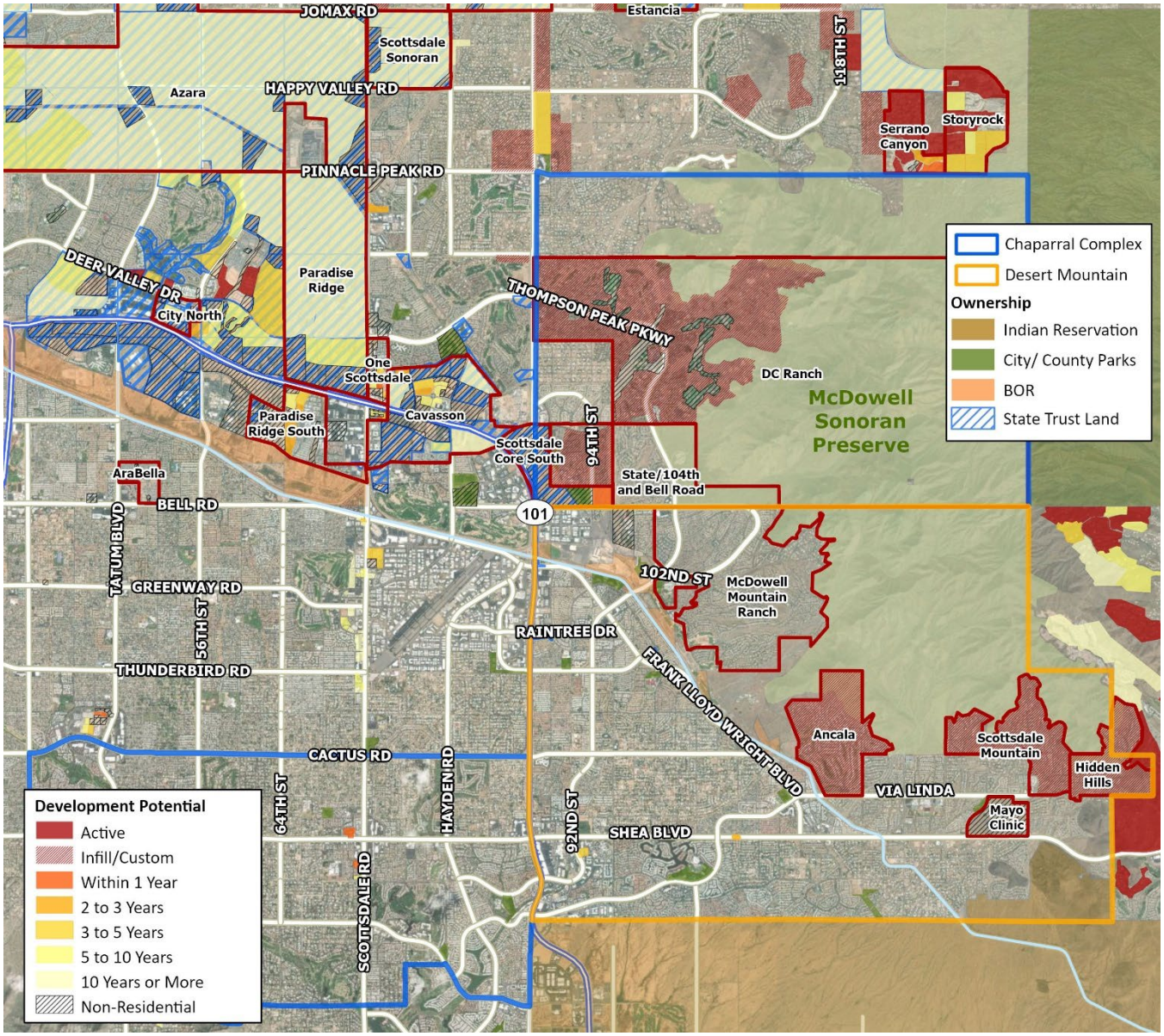


MAP 9
FUTURE LAND USE – SOUTH

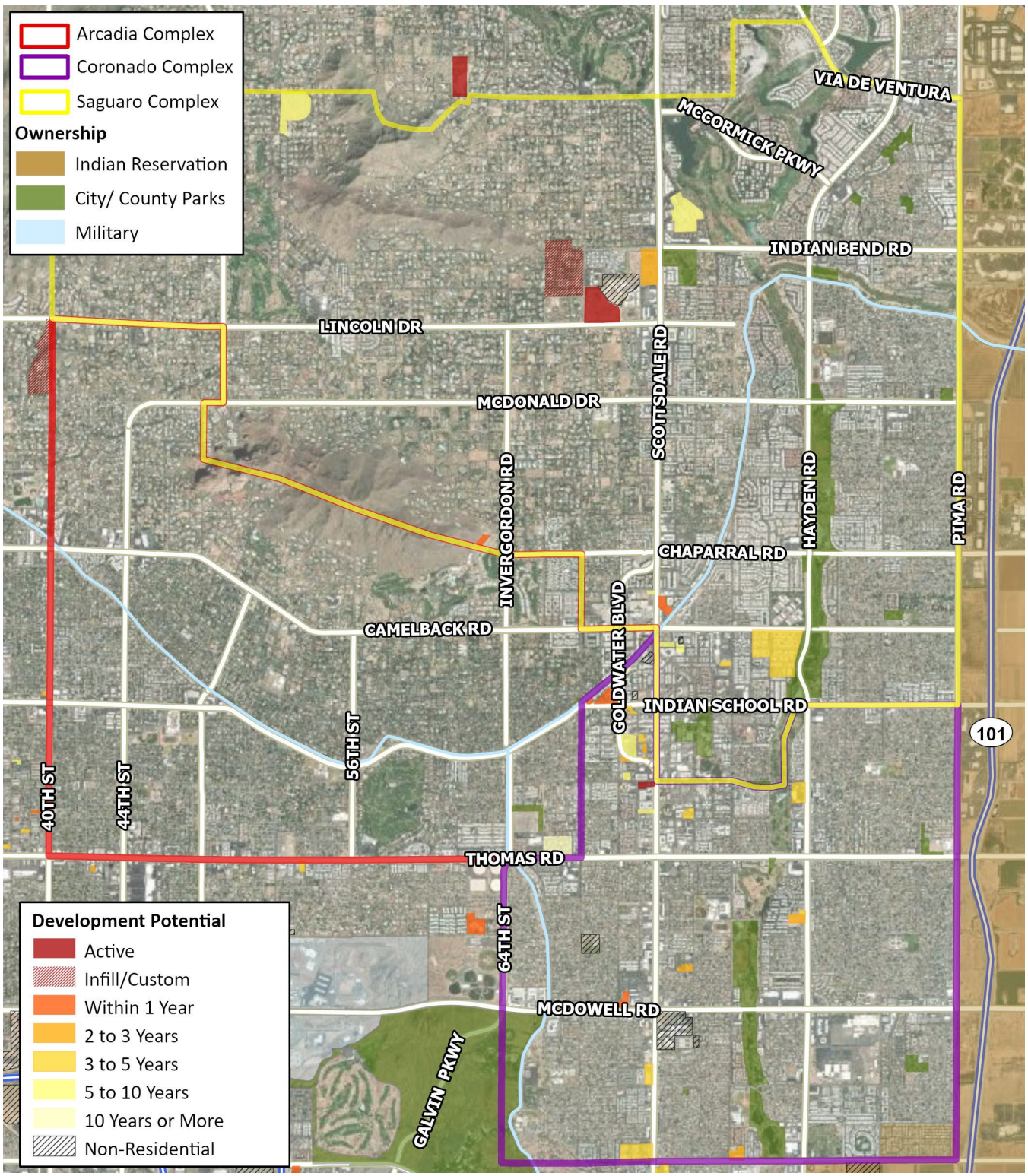


MAP 10

DEVELOPMENT TIMING – NORTH



MAP 11
DEVELOPMENT TIMING – SOUTH



Housing diversity lends stability to the local market since economic disruptions don't affect all types in the same manner or degree and 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 school district, and local household age-structure levels may be unbalanced.

Table 15 shows pricing in or near the District. The data is not comprehensive but is meant to indicate overall housing market characteristics and the range of pricing available. According to regional MLS pricing in Maricopa County, as of August 2025, the median price for a single family home of any size is $500,000. In the zip codes of the District listed below, resale houses are being priced above the regional median. Therefore, the District does not tend to attract many first-time homebuyers, and attainability limits young families from living in the District.

TABLE 15
RESALE HOUSING CHARACTERISTICS BY ZIP CODE

Zip Code	Jurisdiction	Active Listings		Median List Price	Median Days on	Median Rent	Median price / sq ft
85251	Scottsdale	552		$ 679,900	75	$ 2,200	$ 412
85257		194		$ 657,500	63	$ 1,970	$ 387
85259		177		$ 1,600,000	60	$ 2,990	$ 461
85258		235		$ 1,050,000	52	$ 3,500	$ 491
85250		161		$ 700,000	55	$ 2,400	$ 417
Total		1319	Avg	$ 937,480	61	$ 2,612	$ 434

Source: Realtor.com; Applied Economics, October 22, 2025.
* Can include townhouses or condominiums

TABLE 15B
APARTMENT CHARACTERISTICS BY ZIP CODE

Zip Code	Complex	Address	City	Beds Min	Rent Min	Beds Max	Rent Max
85251	The Griffin	3234 N Scottsdale Rd	Scottsdale	1-Bed	$ 1,765	2-Bed	$ 3,215
	Visconti at Camelback	7979 E Camelback Rd		1-Bed	$ 1,011	2-Bed	$ 1,572
	Denim Scottsdale	7791 E Osborn Rd		1-Bed	$ 1,500	3-Bed	$ 2,268
85257	SITE Scottsdale	8750 E McDowell Rd		Studio	$ 1,125	3-Bed	$ 1,675
	MAA SkySong	1301 N Scottsdale Rd		Studio	$ 1,548	2-Bed	$ 2,113
	Scottsdale Entrada Apartments	6460 E McDowell Rd		Studio	$ 1,745	3-Bed	$ 3,447
85259	Jade Scottsdale	11545 N Frank Lloyd Wright Blvd		1-Bed	$ 1,070	2-Bed	$ 1,652
	Villa Montana	11350 E Sahuaro Dr		1-Bed	$ 1,425	2-Bed	$ 1,925
	Cabrillo	11620 E Sahuaro Dr		1-Bed	$ 1,204	2-Bed	$ 1,654
85258	Avia McCormick Ranch	8375 E Via de Ventura		Studio	$ 1,431	3-Bed	$ 2,461
	La Privada	10255 E Via Linda		1-Bed	$ 1,775	3-Bed	$ 3,953
	Mosaic	7007 E Gold Dust Ave		1-Bed	$ 1,307	3-Bed	$ 2,342
85250	The Lincoln Scottsdale	7100 E Lincoln Dr		Studio	$ 1,563	2-Bed	$ 2,466
	Miramonte	8025 E Lincoln Dr		1-Bed	$ 1,540	2-Bed	$ 2,175
	Scottsdale Place Apartments	5959 N 78th St		2-Bed	$ 1,500	3-Bed	$ 2,125

Source: Apartments.com; Applied Economics, October 22, 2025.

3.3.2 Development Projects

The overall residential market in the District is limited by the lack of large parcels available for construction as well as density limitations in Paradise Valley. In the northern part of the District in DC Ranch, infill of vacant lots continues. In most of the other areas of the District, single family development is driven by redevelopment of existing housing units. The Saguaro and Coronado attendance areas have the most potential in terms of multifamily development, although many of the planned developments feature luxury units that do not attract families. The multifamily market is expected to continue to grow in the next few years as the projects outlined below begin construction. There are a few very large planned projects that, if they go to development, could lead to a significant number of new editions during the next 10 years.

Desert Mountain Learning Community

Mercado Village: SEC Shea Blvd and 92nd St; 255 estimated total units.

Mercado Village could feature for-sale condominiums, and it is located near the Honor Health Scottsdale Shea Medical Center, down the road from the Mayo Clinic. This development was proposed with the idea of providing housing to the medical workforce that currently commutes from other areas of the valley. The project has faced backlash from the surrounding neighborhood, but it finally received approval at the end of 2024. There is currently a medical office building **(right)** on the site of the proposed development, so it could be a few years before vertical construction begins.



Chaparral Learning Community

94 Bell: NEC of Bell Rd and 94th St; 52 estimated total lots.

This development **(right)** is being built by American First Builders, who have built many custom homes in the DC Ranch area. This subdivision is on 40 acres and will have 52 single family units. As of May 2025, construction is underway. It is expected that this development could be completed between mid-2027 and early 2028.



Gold Dust Apartments: W SWC of Scottsdale and Gold Dust; 215 estimated total units.

The Gold Dust Apartments **(right)** are just east of Chaparral High School. Construction began in at the end of 2024 and is expected to be completed in early 2027. There will be one- and two-bedroom units with potentially 10 percent of units designated to housing for the city workforce.



Shea Residences/Cosanti Commons: W NWC Scottsdale Rd and Shea Blvd; 189 estimated total units.

About half a mile north of Chaparral High School, this development is planned to have studio, one-, and two-bedroom apartments. This development is expected to have many luxury amenities, such as a spa and cold plunge, so it is not expected to be marketed to families or generate a significant number of new students despite its proximity to Chaparral. Construction has begun, and it is expected to be completed in early 2027.

<u>Saguaro Learning Community</u>

Hazel Scottsdale and Azure Scottsdale: NEC Scottsdale Rd and Camelback Rd; 532 estimated total units.

This mixed-use development was approved a few years ago, but no progress has been made in terms of construction. Hazel is expected to have eight stories and 362 units, while Azure could be 12 stories and 170 units. According to the developer, ZOM Living, both buildings are expected to be completed in 2027. This luxury development is unlikely to attract families with its proximity to Old Town and the expected high rents.

Scottsdale United Methodist Church: N NWC Miller and Indian School; 82 estimated total units.

This church **(right)** plans to build 82 affordable housing units in its parking lot. With the childcare offered at the church, this development would likely attract many young families with children, unlike the majority of new multifamily developments in the Saguaro attendance area. The plan is for two three-story buildings with 48 one-bedroom, 16 two-bedroom, and 18 three-bedroom units. The development could include a playground and play areas for children. This project could be developed within the next three to five years.



The Miller: NWC of Miller and E 6th Ave; 148 estimated total units.

Just north of the church mentioned above is the currently vacant land proposed for the development of The Miller. Between the 148 units and six stories, there could be 123 one-bedroom units and 25 two-bedroom units. Because the majority of the units are one-bedroom, this development is more likely to attract young professionals in the area. This project could be developed within the next three to five years.

Gentry on the Green: SWC Hayden Rd and Camelback Rd; 1,864 estimated total units.



This project was approved in December 2019 with the plan to demolish the existing apartments and condominiums **(right)** on the 41.5-acre site. There will be multiple phases of development, which could go further than the next 10 years. There are mixed reports on what each phase of this development could bring. As of plans submitted in June 2022, Phases 1A could be four stories and have 16 studios, 80 one-bedroom, 120 two-bedroom, and 46 three-bedroom units for a total of 262 units. Phase 1B, which also may be four stories, would have 16 studios, 100 one-bedroom, 141 two-bedroom, and 63 three-bedroom units for a total of 320 units. There would also be about 10,000 square feet of commercial development during these two phases. Future phases, 1C and 1D, would bring the remaining residential units, 632 units and 650 units, respectively, and nearly 10,000 additional square feet of commercial area.

Artesia: N NEC Scottsdale Rd and Indian Bend Rd; 546 estimated total units.

This project began in 2006 and was never completed. In 2023, the Scottsdale Development Review Board gave its approval for this project to begin again. In the center of the 23-acre project, there would be a four-story building with 419 apartments and condominiums; this would include 25 studios, 206 one-bedroom units, 172 two-bedroom units, and 16 three-bedroom units. The next section would have 70 two- and three-story townhomes, and the following section would have 57 two-story townhomes. All three stages would be built at the same time. This development may begin vertical construction in the next five to 10 years. It is estimated that this project could provide housing for more than 1,000 people; this could possibly include families, but it would likely be older families with older children, given the surrounding area of the development.

<u>Coronado Learning Community</u>

5th and Goldwater: NWC Indian School Rd and Goldwater Blvd; 232 estimated total units.



5th and Goldwater **(right)** is a mixed-use development that is replacing several commercial buildings that were built in the 1970s. The five-story project features 26 studios, 116 one-bedroom units, 83 two-bedroom units, and seven three-bedroom units. The first story is expected to have retail and restaurants. This project will face the Development Review Board in November 2025, and if approved, it may begin construction within the next year or so. Given its location just off of Old Town and the luxury design, it is unlikely to attract families with children.

Magnolia Waterside: E NEC Indian School Rd and 68th St; 54 estimated total units.

Magnolia Waterside **(right)** has begun vertical construction on the one-acre site just off Old Town. There will be 48 studio/one-bedroom apartments and six two-bedroom apartments. Because it is mostly one-bedroom units, it is will likely serve as housing for young professionals.



Southdale Development: NEC McDowell Rd and 70th St; 267 estimated total units.

Southdale is another mixed-use development with apartments, retail, and office space. Although building permits were issued in 2024, they have now expired, so new permits will have to be issued for this project to continue. It is expected to have 52 studios, 147 one-bedroom units, and 68 two-bedroom units. The apartments are advertised as being easily accessible to schools, so there could potentially be some students from this development. If the project is developed, it could be completed in early 2028.



38 Oaks: NWC Hayden Rd and Oak St; 38 estimated total units.

This project **(right)** was formerly 26 Oaks but received approval from the city council in August 2025 for 12 additional lots. 38 Oaks could be developed in the next two to three years. It will likely attract families given the proximity to District schools and the high-density, residential nature of the neighborhood.

The Goldwater: SEC Goldwater Blvd and 70th St; 40 estimated total units.

The Goldwater is a mixed-use infill project. The luxury project is expected to be five stories, with the first floor as retail and the remaining four floors as two- and three-bedroom condominiums.



The Arden: NEC Miller Rd and McKellips Rd; 23 estimated total units.

On the east side of Miller, there are many condos and townhomes in this neighborhood, both new and old. This development **(right)** would feature 23 three-story, luxury townhomes. It will face the Development Review Board in late November 2025, and if approved, it could begin construction within two to three years.

Greenbelt 88: SWC Hayden Rd and Osborn Rd; 228 estimated total units.



Greenbelt 88 would replace what remains of the retail center **(right)** on Hayden and Osborn. This would be a mixed-use development with 25,000 square feet of commercial space. After permits are issued, it is estimated to take approximately three years to build, although the restaurants could be built in less than two years. The approximate breakdown is 66 studios, 110 one-bedroom units, and 52 two-bedroom units. Just like the Denim Apartments to the west, this may target young professionals rather than families with children.

Tempe Gateway: NWC Scottsdale Rd and McKellips Rd; 910 estimated total units.

In the southernmost part of the District, bordering the Tempe School District, these apartments are currently called Scottsdale Gateway but will be rebranded as Tempe Gateway. The redevelopment could occur in three phases over more than 10 years. The redevelopment would be mixed-use, with one-, two-, and three-bedroom units, as well as 24,000 square feet of commercial space. This project displaces many older residents who currently live there, and part of the hold-up on redevelopment is due to the relocation of current residents. Given the proximity to ASU, the project could attract college students and young professionals.

<u>Arcadia Learning Community</u>

56th at Arcadia: NWC Thomas and 56th St; 40 estimated total units.



This development **(right)**, which is nearly completed, features 10 two-bedroom and 30 three-bedroom townhomes. It is about two miles southeast of Arcadia High School, and it may attract families with older students.

The Summit Condos: NWC Camelback Rd and 64th St; 63 estimated total units.

The Phoenician continues to expand. Construction has begun on The Summit condos, which are the final phase of Ascent at The Phoenician, and the project is expected to be completed in late 2027. The Phoenician brings in an older demographic that does not lead to significant student generation.

4.0 District Projections

4.1 Population & Housing

Long-term enrollment projections for the District are calculated using a number of factors, including household, demographic, and school-age population and capture rate data. The construction of new housing units and the occupancy rate for all housing units are important and constantly changing factors in population and enrollment projections. Due to the pronounced demographic and development differences that exist among the different areas of the District, the District-level projections are derived from the community-based projections that are discussed in Section 5.0 of this report. The long-term population and housing projections for the District, shown in **Table 16**, are based on trends in housing construction, occupancy, ownership and economic growth indicators.

TABLE 16
HISTORIC AND PROJECTED POPULATION AND HOUSING

Year	Population	Housing Units	New Units	Occupancy Rate	Vacant Units	Households Total	Households Change	Pop/HH
2010/11	**220,818**	**121,603**	**255**	**84.5%**	**18,861**	**102,742**	**-1,210**	**2.149**
2011/12	**221,641**	**121,821**	**218**	**84.6%**	**18,703**	**103,118**	**376**	**2.149**
2012/13	**223,004**	**122,496**	**675**	**84.8%**	**18,618**	**103,878**	**760**	**2.147**
2013/14	**224,295**	**123,288**	**792**	**84.9%**	**18,562**	**104,725**	**847**	**2.142**
2014/15	**226,957**	**124,741**	**1,454**	**85.1%**	**18,602**	**106,140**	**1,414**	**2.138**
2015/16	**229,062**	**125,771**	**1,029**	**85.3%**	**18,550**	**107,220**	**1,081**	**2.136**
2016/17	**230,273**	**126,154**	**383**	**85.4%**	**18,403**	**107,751**	**531**	**2.137**
2017/18	**231,073**	**126,411**	**257**	**85.6%**	**18,236**	**108,175**	**424**	**2.136**
2018/19	**233,501**	**127,526**	**1,115**	**85.7%**	**18,188**	**109,338**	**1,164**	**2.136**
2019/20	**235,301**	**128,396**	**869**	**85.9%**	**18,094**	**110,302**	**964**	**2.133**
2020/21	**237,534**	**129,648**	**1,253**	**86.1%**	**18,060**	**111,588**	**1,286**	**2.129**
2021/22	**239,442**	**130,878**	**1,230**	**86.1%**	**18,202**	**112,676**	**1,088**	**2.125**
2022/23	**241,447**	**132,098**	**1,220**	**86.1%**	**18,316**	**113,781**	**1,106**	**2.122**
2023/24	**243,799**	**133,391**	**1,293**	**86.2%**	**18,416**	**114,974**	**1,193**	**2.120**
2024/25	**244,746**	**133,957**	**567**	**86.2%**	**18,428**	**115,529**	**555**	**2.118**
2025/26	**246,433**	**134,964**	**1,007**	**86.4%**	**18,416**	**116,548**	**1,019**	**2.114**
2026/27	249,124	136,485	1,521	86.4%	18,528	117,958	1,409	2.112
2027/28	250,203	137,139	653	86.5%	18,549	118,590	632	2.110
2028/29	252,253	138,330	1,191	86.5%	18,639	119,691	1,101	2.108
2029/30	253,396	139,099	769	86.6%	18,684	120,414	724	2.104
2030/31	254,915	140,075	976	86.6%	18,707	121,368	953	2.100
2031/32	256,532	141,190	1,115	86.7%	18,834	122,356	989	2.097
2032/33	258,718	142,566	1,376	86.7%	19,002	123,565	1,208	2.094
2033/34	259,478	143,167	601	86.7%	19,082	124,085	520	2.091
2034/35	260,650	144,028	861	86.7%	19,197	124,832	747	2.088
2035/36	262,429	145,204	1,176	86.7%	19,322	125,882	1,051	2.085
2026/27-2035/36			10,240				9,334	

Source: Applied Economics, 2025.
***Bolding Indicates historical estimates.**

Currently, the District contains nearly 116,550 households (occupied housing units), resulting in a population per household of 2.114 persons. District population and households are expected to increase steadily throughout the projection period as new housing supply enters the market and redevelopment continues. However, the population per household is projected to steadily decline over the 10-year period while occupancy rates stabilize at about 86 percent.

By 2035/36, about 10,240 new housing units are projected to be added to the District's inventory, resulting in a population increase of about 16,000 persons in about 9,330 new households. A decline in the school-age population in existing housing, combined with declining service rates, is projected to offset any enrollment growth that would otherwise be associated with the creation of these new households.

4.2 Enrollment

In addition to the volume and market orientation of housing development, trends in per-household student generation rates and service rates are key factors used in determining future enrollment levels, as shown in **Table 17**. The first element, student generation, refers to the expected size of the school-age population (persons aged 5 to 17 years old) per household. The average number of school-age persons per household has decreased from 0.303 in 2010/11 to 0.230 in 2025/26. The District is expected to experience continued declines in student generation rates, dropping to just 0.199 in 2035/26. It should be noted, however, that these rates vary significantly within the District.

Due to the increasing number of educational alternatives and open enrollment policies, it is necessary to apply an enrollment-to-population (E-P) ratio to the school-age population in order to project enrollment. Open enrollment causes a shifting of students between districts, with gains and losses offsetting each other to varying degrees, whereas charter schools only detract from district enrollment. The E-P ratio can be based on the net difference between the school-age population and **total** enrollment, acknowledging that there are flows of students between all school districts in Arizona, or it can be based on **in-District** enrollment alone (hereafter referred to as the Service Rate).

In 2010/11, the District's E-P ratio was 0.836, and its Service Rate was 71.1 percent. Between 2010/11 and 2019/20, the school-age population of the District declined by 2,600 persons, while in-District enrollment fell by 5,200 students, bringing the Service Rate down to 61.4 percent. During this period, enrollment in local area charter schools increased by over 6,300 students. While they were certainly not all District residents, the proliferation more than explains the decline in in-District enrollment. Meanwhile, total enrollment declined by only about 3,700 students as increases in out-of-District enrollment offset some of the in-District losses. As a result, the E-P Ratio fell from 0.836 in 2010/11 to 0.778 in 2019/20.

The COVID pandemic triggered a large one-time loss in 2020/21, as it did for many Arizona school districts, and like other more affluent areas, those losses proved to be permanent. Subsequent losses in 2021/22 and 2022/23 were small, but have since accelerated, coinciding with ESAs becoming universal and the increasing share of new program participants who were formerly in public schools (including charter schools).

TABLE 17
SCHOOL-AGE POPULATION AND ENROLLMENT

Year	Households	School-Age Population *		K-12 Enrollment		Enrollment - Population Ratio	Out-of District Enrollment	In-District Enrollment	Service Rate
		Total	Per Household	Total	Per Household				
2010/11	**102,742**	**31,084**	**0.303**	**25,989**	**0.253**	**0.836**	**3,886**	**22,103**	**71.1%**
2011/12	**103,118**	**30,674**	**0.297**	**25,691**	**0.249**	**0.838**	**3,936**	**21,755**	**70.9%**
2012/13	**103,878**	**30,355**	**0.292**	**25,167**	**0.242**	**0.829**	**3,991**	**21,176**	**69.8%**
2013/14	**104,725**	**29,954**	**0.286**	**24,775**	**0.237**	**0.827**	**4,048**	**20,727**	**69.2%**
2014/15	**106,140**	**29,920**	**0.282**	**23,604**	**0.222**	**0.789**	**4,462**	**19,142**	**64.0%**
2015/16	**107,220**	**29,705**	**0.277**	**23,414**	**0.218**	**0.788**	**4,494**	**18,920**	**63.7%**
2016/17	**107,751**	**29,376**	**0.273**	**23,280**	**0.216**	**0.792**	**4,598**	**18,682**	**63.6%**
2017/18	**108,175**	**29,025**	**0.268**	**22,853**	**0.211**	**0.787**	**4,473**	**18,380**	**63.3%**
2018/19	**109,338**	**28,831**	**0.264**	**22,371**	**0.205**	**0.776**	**4,396**	**17,975**	**62.3%**
2019/20	**110,302**	**28,590**	**0.259**	**22,233**	**0.202**	**0.778**	**4,667**	**17,566**	**61.4%**
2020/21	**111,588**	**28,416**	**0.255**	**21,437**	**0.192**	**0.754**	**4,553**	**16,884**	**59.4%**
2021/22	**112,676**	**28,087**	**0.249**	**21,302**	**0.189**	**0.758**	**4,622**	**16,680**	**59.4%**
2022/23	**113,781**	**27,777**	**0.244**	**20,939**	**0.184**	**0.754**	**4,630**	**16,309**	**58.7%**
2023/24	**114,974**	**27,491**	**0.239**	**20,220**	**0.176**	**0.736**	**4,954**	**15,266**	**55.5%**
2024/25	**115,529**	**27,109**	**0.235**	**20,099**	**0.174**	**0.741**	**4,825**	**15,274**	**56.3%**
2025/26	**116,548**	**26,821**	**0.230**	**19,742**	**0.169**	**0.736**	**4,965**	**14,777**	**55.1%**
2026/27	117,958	26,691	0.226	19,402	0.164	0.727	4,960	14,442	54.1%
2027/28	118,590	26,480	0.223	19,147	0.161	0.723	4,955	14,192	53.6%
2028/29	119,691	26,295	0.220	19,066	0.159	0.725	4,950	14,116	53.7%
2029/30	120,414	26,099	0.217	18,811	0.156	0.721	4,945	13,866	53.1%
2030/31	121,368	25,867	0.213	18,661	0.154	0.721	4,940	13,721	53.0%
2031/32	122,356	25,696	0.210	18,361	0.150	0.715	4,935	13,426	52.3%
2032/33	123,565	25,558	0.207	18,155	0.147	0.710	4,930	13,225	51.7%
2033/34	124,085	25,337	0.204	17,813	0.144	0.703	4,925	12,888	50.9%
2034/35	124,832	25,140	0.201	17,473	0.140	0.695	4,920	12,553	49.9%
2035/36	125,882	24,990	0.199	17,343	0.138	0.694	4,916	12,428	49.7%

Source: Applied Economics, 2025.
* Population age 5 through 17, corresponds with Kindergarten through 12th grade.
***Bolding Indicates historical estimates.**

Between 2019/20 and 2025/26, the school-age population of the District declined by about 1,800 persons, while in-District enrollment fell by about 2,800 students, reducing the in-District Service Rate to about 55.1 percent. This year, the District enrolled nearly 4,970 out-of-District students, meaning that 14,780 of the District's 26,820 resident school-age children attend District schools. For the purposes of this analysis, the level of out-of-District enrollment is assumed to remain fairly stable throughout the projection period.

Based on the projected change in the school-age population and trends associated with the in-District Service Rate, in-District enrollment is projected to steadily decline throughout the projection period. The effect of new home construction on enrollment over the next ten years is expected to be largely offset by the aging of the population in existing housing units and the continued loss of resident students to alternative providers. As a result, total K-12 enrollment is projected to decline by about 2,400 students (12 percent) over the next ten years, dropping to about 17,340 students by 2035/36. **Table 18** provides more detail on District enrollment history and projections by grade level.

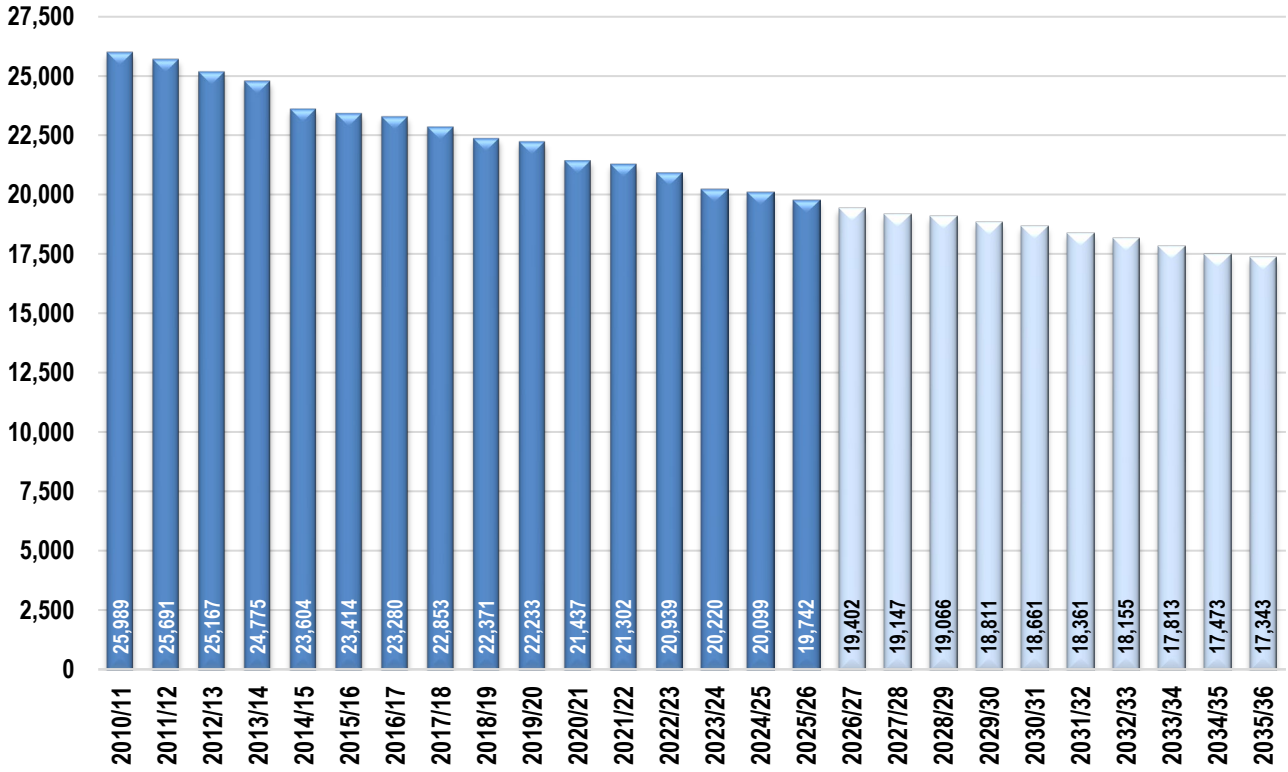
TABLE 18
HISTORIC AND PROJECTED TOTAL ENROLLMENT BY LEVEL

	Enrollment by Level				K-12 Total			Share by Level		
Fall	K-5	6-8	K-8	9-12	Enrollment	Change	% Change	K-5	6-8	9-12
2010/11	**11,266**	**5,798**	**17,064**	**8,925**	**25,989**	**-407**	**-1.5%**	**43.3%**	**22.3%**	**34.3%**
2011/12	**11,088**	**5,898**	**16,986**	**8,705**	**25,691**	**-298**	**-1.1%**	**43.2%**	**23.0%**	**33.9%**
2012/13	**10,856**	**5,613**	**16,469**	**8,698**	**25,167**	**-524**	**-2.0%**	**43.1%**	**22.3%**	**34.6%**
2013/14	**10,555**	**5,684**	**16,239**	**8,536**	**24,775**	**-392**	**-1.6%**	**42.6%**	**22.9%**	**34.5%**
2014/15	**9,749**	**5,442**	**15,191**	**8,413**	**23,604**	**-1,171**	**-4.7%**	**41.3%**	**23.1%**	**35.6%**
2015/16	**9,690**	**5,299**	**14,989**	**8,425**	**23,414**	**-190**	**-0.8%**	**41.4%**	**22.6%**	**36.0%**
2016/17	**9,417**	**5,356**	**14,773**	**8,507**	**23,280**	**-134**	**-0.6%**	**40.5%**	**23.0%**	**36.5%**
2017/18	**9,192**	**5,298**	**14,490**	**8,363**	**22,853**	**-427**	**-1.8%**	**40.2%**	**23.2%**	**36.6%**
2018/19	**8,788**	**5,210**	**13,998**	**8,373**	**22,371**	**-482**	**-2.1%**	**39.3%**	**23.3%**	**37.4%**
2019/20	**8,681**	**5,101**	**13,782**	**8,451**	**22,233**	**-138**	**-0.6%**	**39.0%**	**22.9%**	**38.0%**
2020/21	**8,337**	**4,855**	**13,192**	**8,245**	**21,437**	**-796**	**-3.6%**	**38.9%**	**22.6%**	**38.5%**
2021/22	**8,564**	**4,829**	**13,393**	**7,909**	**21,302**	**-135**	**-0.6%**	**40.2%**	**22.7%**	**37.1%**
2022/23	**8,342**	**4,649**	**12,991**	**7,948**	**20,939**	**-363**	**-1.7%**	**39.8%**	**22.2%**	**38.0%**
2023/24	**8,164**	**4,406**	**12,570**	**7,650**	**20,220**	**-719**	**-3.4%**	**40.4%**	**21.8%**	**37.8%**
2024/25	**8,153**	**4,395**	**12,548**	**7,551**	**20,099**	**-121**	**-0.6%**	**40.6%**	**21.9%**	**37.6%**
2025/26	**8,098**	**4,235**	**12,333**	**7,409**	**19,742**	**-357**	**-1.8%**	**41.0%**	**21.5%**	**37.5%**
2026/27	7,940	4,309	12,249	7,153	19,402	-340	-1.7%	40.9%	22.2%	36.9%
2027/28	7,724	4,390	12,114	7,033	19,147	-255	-1.3%	40.3%	22.9%	36.7%
2028/29	7,609	4,406	12,015	7,051	19,066	-81	-0.4%	39.9%	23.1%	37.0%
2029/30	7,538	4,204	11,742	7,069	18,811	-255	-1.3%	40.1%	22.3%	37.6%
2030/31	7,379	4,066	11,445	7,216	18,661	-150	-0.8%	39.5%	21.8%	38.7%
2031/32	7,266	3,978	11,244	7,117	18,361	-300	-1.6%	39.6%	21.7%	38.8%
2032/33	7,173	3,977	11,150	7,005	18,155	-206	-1.1%	39.5%	21.9%	38.6%
2033/34	7,066	3,873	10,939	6,874	17,813	-342	-1.9%	39.7%	21.7%	38.6%
2034/35	6,988	3,839	10,827	6,646	17,473	-340	-1.9%	40.0%	22.0%	38.0%
2035/36	6,932	3,804	10,736	6,607	17,343	-130	-0.7%	40.0%	21.9%	38.1%

Source: Applied Economics, 2025.
***Bolding Indicates historical estimates.**

As also depicted in **Figure 8,** the District's enrollment losses are projected to be slightly stronger during the second half of the projection period. There could be a loss of almost 1,080 students for the first five-year period (a 5 percent decline compared to 2025/26). About 67 percent of that decline is projected to come from the loss of nearly 720 K-5 students by 2030/31. During the second half of the projection period, the rate of enrollment decline is projected to increase to 7 percent (between 2030/31 and 2035/36), totaling a loss of nearly 1,320 students for the period. Unlike the first five-year period, however, the majority of the loss (46 percent) is expected to come from declines in 9-12 enrollment between 2030/31 and 2035/36.

FIGURE 8
ACTUAL AND PROJECTED K-12 ENROLLMENT



Sources: Scottsdale Unified School District Applied Economics, 2025.

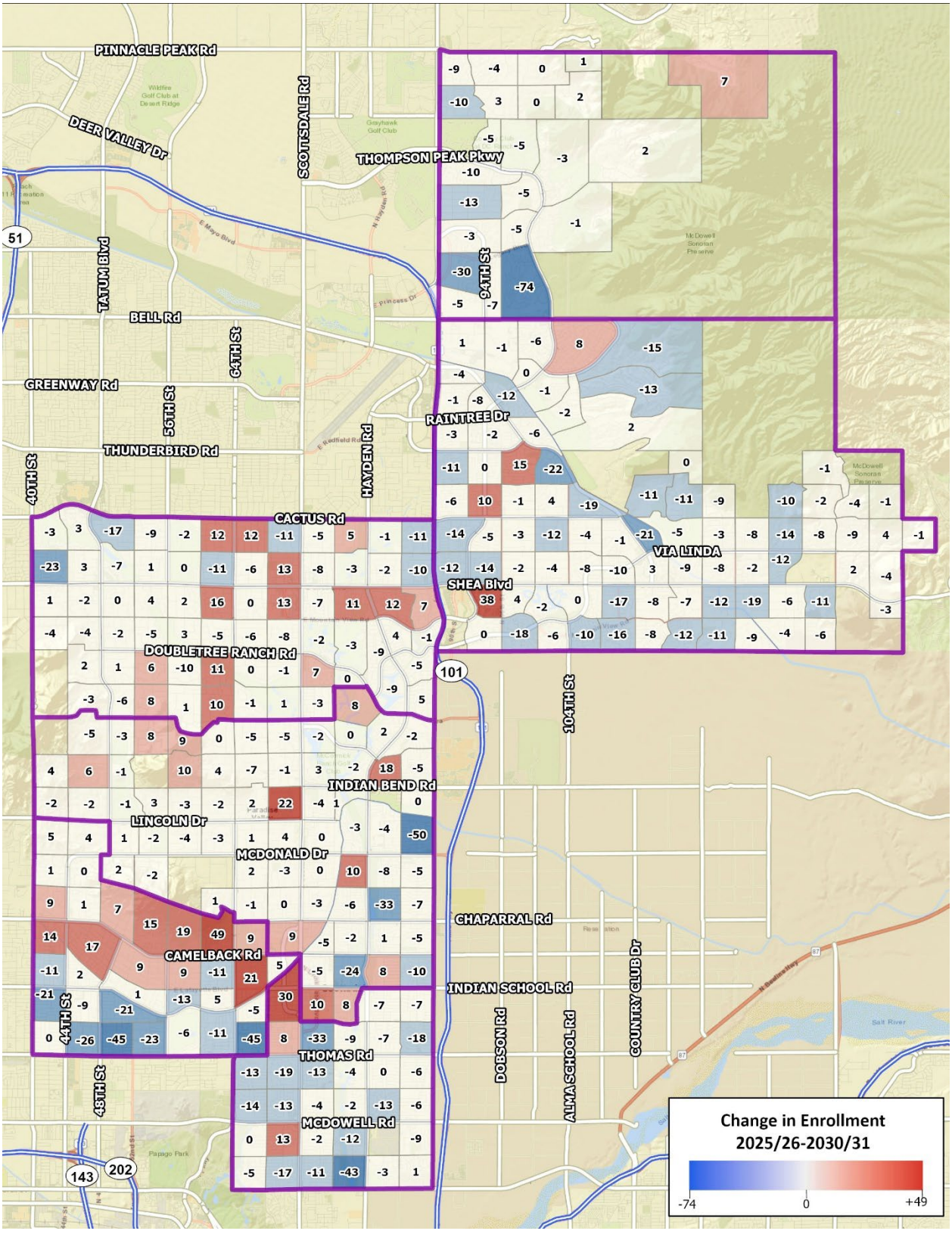
5.0 Sub-District Projections

The purpose of this section is to provide sub-District enrollment projections based on attendance at each school and the residency of the District's student population, which forms the basis for the grid-level projections. Accordingly, the section begins with projections for each community based on the school of attendance. These projections form the basis for the District enrollment projections and provide baseline information for comparing enrollment by school with enrollment by attendance area.

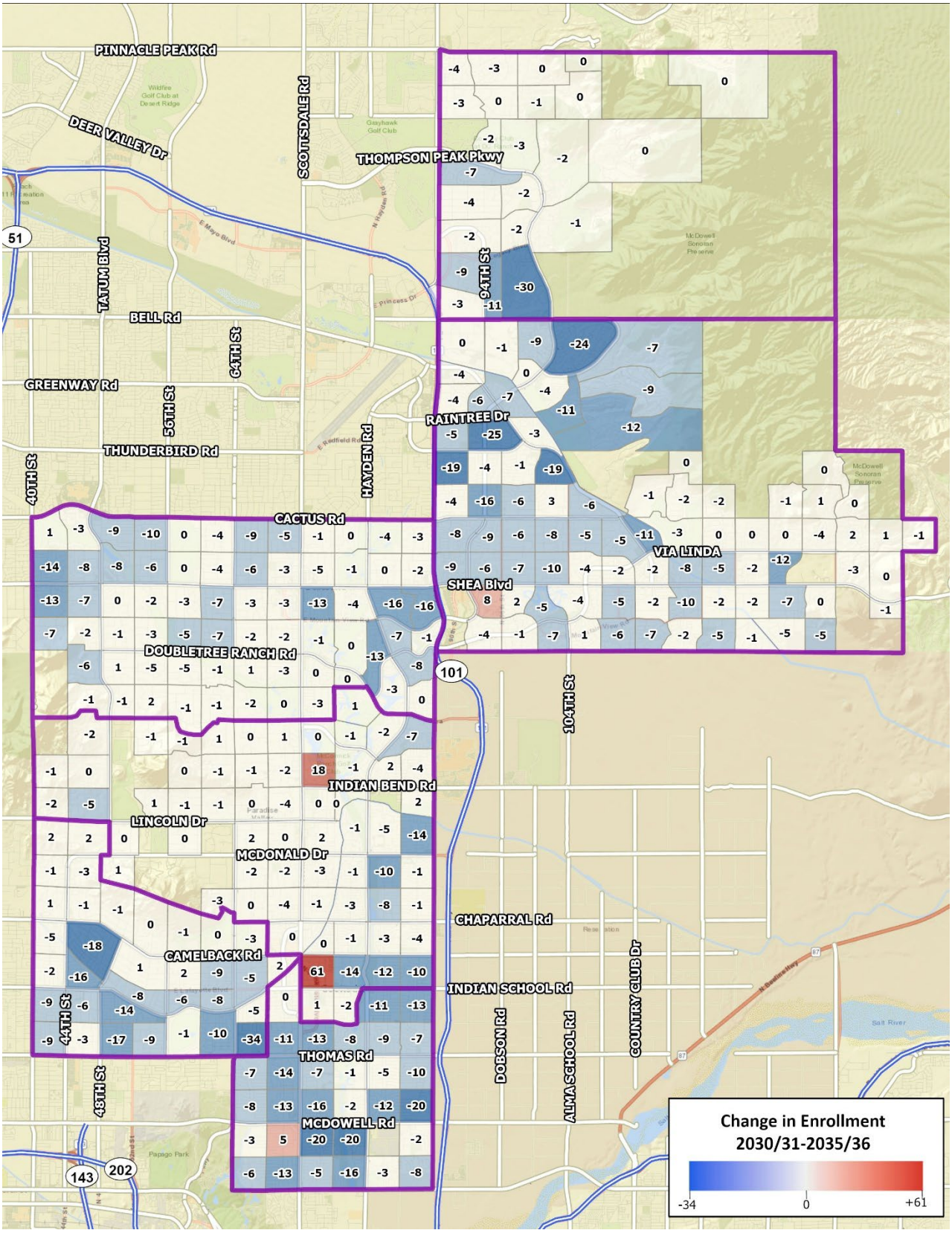
The sub-District analysis aggregates grid-level enrollment by attendance area, which is most closely linked to the characteristics of the population in specific parts of the District. These projections are used in conjunction with the analysis of residence versus enrollment in the final part of the section to project the level of enrollment by school over the next ten years.

The grid-level projections are illustrated by **Maps 12 and 13**, which show the expected change in enrollment by grid for the 2025/26 to 2030/31 and 2030/31 to 2035/36 time periods, respectively. During the first five-year period, enrollment declines are expected in the most northern and eastern parts of the District. Some enrollment gains can be seen, but they are highly concentrated, particularly in the Arcadia Community. During the second five-year period, there are very few gains in enrollment. Enrollment declines may continue to be concentrated in the most northern and southern parts of the District.

MAP 12
ENROLLMENT CHANGE: 2025/26 - 2030/31



MAP 13
ENROLLMENT CHANGE: 2030/31 - 2035/36



5.1 Enrollment Trends by Community

Each of the District's communities have notable differences in demographic and household characteristics that can be expected to cause variations in enrollment in the future, but that are masked when examining the District-level information. In some communities there are short-term factors affecting enrollment, while longer-term trends are present in others. The following projections are based on community attendance figures. The relationship between attendance and residence is altered by open enrollment and other factors, as will be discussed later in this section.

5.1.1 Arcadia Community

The Arcadia Community is an older, well-established area, and enrollment in its schools has fluctuated within a fairly narrow margin until 2020/21, when the effect of the pandemic caused a significant decline in enrollment that was not recovered in the following years (**Tables 19 and 20**). Since 2021/22, enrollment has averaged about 3,950 students. The total population in this area has grown by about 8 percent since 2010, but the school-age population has declined by about 3 percent during the same time period. Therefore, despite the attractiveness of this community to students from outside the District, the resident population continues to age. Enrollment is projected to decline slowly to total about 3,690 K-12 students by 2035/36, which is a 7 percent decline compared to 2025/26 enrollment. About 52 percent of this loss (-139 students) could be in the K-5 cohort, while the 6-8 and 9-12 cohorts are not expected to lose more than 90 and 40 students, respectively.

TABLE 19
ARCADIA COMMUNITY ENROLLMENT

		School-Age Population *		K-12 Enrollment		Net	Enrollment -
Year	Households	Total	Per Household	Total	Per Household	Difference	Population Ratio
2010/11	**13,072**	**4,799**	**0.367**	**4,482**	**0.343**	**317**	**0.934**
2011/12	**13,130**	**4,801**	**0.366**	**4,542**	**0.346**	**259**	**0.946**
2012/13	**13,190**	**4,803**	**0.364**	**4,494**	**0.341**	**309**	**0.936**
2013/14	**13,253**	**4,806**	**0.363**	**4,636**	**0.350**	**170**	**0.965**
2014/15	**13,320**	**4,810**	**0.361**	**4,501**	**0.338**	**309**	**0.936**
2015/16	**13,469**	**4,843**	**0.360**	**4,549**	**0.338**	**294**	**0.939**
2016/17	**13,538**	**4,848**	**0.358**	**4,639**	**0.343**	**209**	**0.957**
2017/18	**13,605**	**4,852**	**0.357**	**4,536**	**0.333**	**316**	**0.935**
2018/19	**13,764**	**4,888**	**0.355**	**4,368**	**0.317**	**520**	**0.894**
2019/20	**13,829**	**4,891**	**0.354**	**4,444**	**0.321**	**447**	**0.909**
2020/21	**13,901**	**4,896**	**0.352**	**4,185**	**0.301**	**711**	**0.855**
2021/22	**13,922**	**4,830**	**0.347**	**3,996**	**0.287**	**834**	**0.827**
2022/23	**13,996**	**4,783**	**0.342**	**3,951**	**0.282**	**832**	**0.826**
2023/24	**14,109**	**4,750**	**0.337**	**3,894**	**0.276**	**856**	**0.820**
2024/25	**14,186**	**4,705**	**0.332**	**3,971**	**0.280**	**734**	**0.844**
2025/26	**14,286**	**4,667**	**0.327**	**3,956**	**0.277**	**711**	**0.848**
2026/27	14,351	4,646	0.324	4,003	0.279	643	0.862
2027/28	14,409	4,623	0.321	4,021	0.279	602	0.870
2028/29	14,462	4,598	0.318	4,009	0.277	589	0.872
2029/30	14,511	4,572	0.315	3,975	0.274	597	0.869
2030/31	14,533	4,538	0.312	3,963	0.273	575	0.873
2031/32	14,560	4,506	0.309	3,887	0.267	619	0.863
2032/33	14,602	4,478	0.307	3,867	0.265	611	0.864
2033/34	14,628	4,446	0.304	3,809	0.260	637	0.857
2034/35	14,647	4,411	0.301	3,713	0.254	698	0.842
2035/36	14,674	4,380	0.298	3,691	0.252	689	0.843

Source: Applied Economics, 2025.
* Population age 5 through 17, corresponds with Kindergartern through 12th grade.
Bolding indicates historical data.

TABLE 20
ARCADIA COMMUNITY ENROLLMENT BY GRADE COHORT

	Enrollment by Level				K-12 Total		
Fall	K-5	6-8	K-8	9-12	Enrollment	Change	% Change
2010/11	**1,865**	**904**	**2,769**	**1,713**	**4,482**	**-155**	**-3.3%**
2011/12	**1,869**	**987**	**2,856**	**1,686**	**4,542**	**60**	**1.3%**
2012/13	**1,877**	**908**	**2,785**	**1,709**	**4,494**	**-48**	**-1.1%**
2013/14	**1,926**	**967**	**2,893**	**1,743**	**4,636**	**142**	**3.2%**
2014/15	**1,814**	**954**	**2,768**	**1,733**	**4,501**	**-135**	**-2.9%**
2015/16	**1,856**	**941**	**2,797**	**1,752**	**4,549**	**48**	**1.1%**
2016/17	**1,856**	**1,049**	**2,905**	**1,734**	**4,639**	**90**	**2.0%**
2017/18	**1,745**	**1,064**	**2,809**	**1,727**	**4,536**	**-103**	**-2.2%**
2018/19	**1,606**	**1,026**	**2,632**	**1,736**	**4,368**	**-168**	**-3.7%**
2019/20	**1,552**	**1,031**	**2,583**	**1,861**	**4,444**	**76**	**1.7%**
2020/21	**1,505**	**952**	**2,457**	**1,728**	**4,185**	**-259**	**-5.8%**
2021/22	**1,488**	**921**	**2,409**	**1,587**	**3,996**	**-189**	**-4.5%**
2022/23	**1,456**	**882**	**2,338**	**1,613**	**3,951**	**-45**	**-1.1%**
2023/24	**1,420**	**861**	**2,281**	**1,613**	**3,894**	**-57**	**-1.4%**
2024/25	**1,412**	**882**	**2,294**	**1,677**	**3,971**	**77**	**2.0%**
2025/26	**1,409**	**838**	**2,247**	**1,709**	**3,956**	**-15**	**-0.4%**
2026/27	1,381	853	2,234	1,769	4,003	47	1.2%
2027/28	1,335	859	2,194	1,827	4,021	18	0.4%
2028/29	1,330	856	2,186	1,823	4,009	-12	-0.3%
2029/30	1,324	826	2,150	1,825	3,975	-34	-0.8%
2030/31	1,301	790	2,091	1,872	3,963	-12	-0.3%
2031/32	1,294	787	2,081	1,806	3,887	-76	-1.9%
2032/33	1,289	781	2,070	1,797	3,867	-20	-0.5%
2033/34	1,282	760	2,042	1,767	3,809	-58	-1.5%
2034/35	1,275	754	2,029	1,684	3,713	-96	-2.5%
2035/36	1,270	751	2,021	1,670	3,691	-22	-0.6%

Source: Applied Economics, 2025.
Bolding indicates historical estimates.

5.1.2 Chaparral Community

From 2010/11 through 2021/22, the Chaparral Community experienced minor enrollment fluctuations, including only a slight decline due to the pandemic (**Tables 21 and 22**). However, after 2021/22, enrollment began to decline significantly, and as of 2025/26, enrollment has declined by 11 percent (about 550 students) compared to 2021/22 enrollment. While not nearly as established as the Arcadia Community, there are some signs that this area is gentrifying. Since 2010, the population in this community has grown by about 4 percent, while the school-age population has declined by nearly 10 percent. In addition, according to the 2010 Census and the estimates prepared by Applied Economics for 2025, the population over 64 years of age has increased from 22 percent in 2010 to over 34 percent of the population in 2025. Also, the share of persons in the prime parenting age-group (25 to 44 years) has fallen from 19 percent in 2010 to 15 percent in 2025. With the aging of the resident population, enrollment in the Chaparral Community is projected to decrease to about 4,070 K-12 students by 2035/36, which is a loss of about 280 students (6 percent) over the 10-year period. There could be a slight gain of about 80 students by 2030/31 during the first half of the projection period. However, between 2030/31 and 2035/36, the Community could lose about 350 students, nearly half of whom are in the K-5 cohort.

TABLE 21
CHAPARRAL COMMUNITY ENROLLMENT

		School-Age Population *		K-12 Enrollment			Enrollment -
Year	Households	Total	Per Household	Total	Per Household	Difference	Population Ratio
2010/11	**14,883**	**5,745**	**0.386**	**4,725**	**0.317**	**1,020**	**0.822**
2011/12	**14,907**	**5,715**	**0.383**	**4,800**	**0.322**	**915**	**0.840**
2012/13	**14,935**	**5,687**	**0.381**	**4,688**	**0.314**	**999**	**0.824**
2013/14	**14,971**	**5,662**	**0.378**	**4,593**	**0.307**	**1,069**	**0.811**
2014/15	**15,001**	**5,635**	**0.376**	**4,490**	**0.299**	**1,145**	**0.797**
2015/16	**15,035**	**5,609**	**0.373**	**4,601**	**0.306**	**1,008**	**0.820**
2016/17	**15,070**	**5,584**	**0.371**	**4,780**	**0.317**	**804**	**0.856**
2017/18	**15,107**	**5,559**	**0.368**	**4,867**	**0.322**	**692**	**0.875**
2018/19	**15,153**	**5,538**	**0.366**	**4,932**	**0.325**	**606**	**0.891**
2019/20	**15,215**	**5,523**	**0.363**	**5,049**	**0.332**	**474**	**0.914**
2020/21	**15,260**	**5,502**	**0.361**	**4,931**	**0.323**	**571**	**0.896**
2021/22	**15,285**	**5,436**	**0.356**	**4,893**	**0.320**	**543**	**0.900**
2022/23	**15,307**	**5,369**	**0.351**	**4,729**	**0.309**	**640**	**0.881**
2023/24	**15,335**	**5,306**	**0.346**	**4,486**	**0.293**	**820**	**0.846**
2024/25	**15,357**	**5,241**	**0.341**	**4,384**	**0.285**	**857**	**0.837**
2025/26	**15,378**	**5,176**	**0.337**	**4,347**	**0.283**	**829**	**0.840**
2026/27	15,401	5,122	0.333	4,299	0.279	822	0.839
2027/28	15,687	5,154	0.329	4,328	0.276	826	0.840
2028/29	15,774	5,120	0.325	4,366	0.277	754	0.853
2029/30	16,051	5,148	0.321	4,412	0.275	736	0.857
2030/31	16,077	5,094	0.317	4,423	0.275	671	0.868
2031/32	16,080	5,059	0.315	4,341	0.270	718	0.858
2032/33	16,087	5,026	0.312	4,252	0.264	774	0.846
2033/34	16,124	5,003	0.310	4,199	0.260	803	0.839
2034/35	16,150	4,976	0.308	4,106	0.254	870	0.825
2035/36	16,188	4,952	0.306	4,072	0.252	880	0.822

Source: Applied Economics, 2025.
* Population age 5 through 17, corresponds with Kindergartern through 12th grade.
Bolding indicates historical data.

TABLE 22
CHAPARRAL COMMUNITY ENROLLMENT BY GRADE COHORT

	Enrollment by Level				K-12 Total		
Fall	K-5	6-8	K-8	9-12	Enrollment	Change	% Change
2010/11	**1,736**	**873**	**2,609**	**2,116**	**4,725**	**-41**	**-0.9%**
2011/12	**1,722**	**890**	**2,612**	**2,188**	**4,800**	**75**	**1.6%**
2012/13	**1,677**	**906**	**2,583**	**2,105**	**4,688**	**-112**	**-2.3%**
2013/14	**1,624**	**892**	**2,516**	**2,077**	**4,593**	**-95**	**-2.0%**
2014/15	**1,530**	**897**	**2,427**	**2,063**	**4,490**	**-103**	**-2.2%**
2015/16	**1,629**	**886**	**2,515**	**2,086**	**4,601**	**111**	**2.5%**
2016/17	**1,633**	**928**	**2,561**	**2,219**	**4,780**	**179**	**3.9%**
2017/18	**1,717**	**907**	**2,624**	**2,243**	**4,867**	**87**	**1.8%**
2018/19	**1,733**	**895**	**2,628**	**2,304**	**4,932**	**65**	**1.3%**
2019/20	**1,798**	**904**	**2,702**	**2,347**	**5,049**	**117**	**2.4%**
2020/21	**1,741**	**913**	**2,654**	**2,277**	**4,931**	**-118**	**-2.3%**
2021/22	**1,863**	**897**	**2,760**	**2,133**	**4,893**	**-38**	**-0.8%**
2022/23	**1,789**	**886**	**2,675**	**2,054**	**4,729**	**-164**	**-3.4%**
2023/24	**1,772**	**845**	**2,617**	**1,869**	**4,486**	**-243**	**-5.1%**
2024/25	**1,752**	**859**	**2,611**	**1,773**	**4,384**	**-102**	**-2.3%**
2025/26	**1,772**	**886**	**2,658**	**1,689**	**4,347**	**-37**	**-0.8%**
2026/27	1,755	914	2,669	1,630	4,299	-48	-1.1%
2027/28	1,731	940	2,671	1,657	4,328	29	0.7%
2028/29	1,722	913	2,635	1,731	4,366	38	0.9%
2029/30	1,729	909	2,638	1,774	4,412	46	1.0%
2030/31	1,693	873	2,566	1,857	4,423	11	0.3%
2031/32	1,650	880	2,530	1,811	4,341	-82	-1.8%
2032/33	1,609	879	2,488	1,764	4,252	-89	-2.1%
2033/34	1,575	861	2,436	1,763	4,199	-53	-1.2%
2034/35	1,547	845	2,392	1,714	4,106	-93	-2.2%
2035/36	1,519	831	2,350	1,722	4,072	-34	-0.8%

Source: Applied Economics, 2025.
Bolding indicates historical estimates.

5.1.3 Chaparral North Community

Compared to 2010/11, the Chaparral North Community schools have had a significant decline in enrollment (**Tables 23 and 24**). Despite strong population growth in the Chaparral North community, enrollment in its schools has declined every year but two since 2010/11 due to increased competition from alternative providers in the area, an aging resident population, and a declining student population. In total, K-8 enrollment has dropped by almost 64 percent (about 770 students) since 2010/11. Enrollment declines are expected to continue for the next 10 years, resulting in K-8 enrollment of just 270 students by 2035/36. About 56 percent of the decline in enrollment could be in the K-5 cohort. Enrollment is expected to decline by an average of about 3 percent between 2025/26 and 2030/31, and it could accelerate to decline by an average of about 7 percent between 2030/31 and 2035/36.

TABLE 23
CHAPARRAL NORTH COMMUNITY ENROLLMENT

		School-Age Population *		K-8 Enrollment			Enrollment -
Year	Households	Total	Per Household	Total	Per Household	Difference	Population Ratio
2010/11	**3,470**	**1,339**	**0.386**	**1,207**	**0.348**	**132**	**0.901**
2011/12	**3,555**	**1,326**	**0.373**	**1,230**	**0.346**	**96**	**0.927**
2012/13	**3,617**	**1,304**	**0.361**	**1,198**	**0.331**	**106**	**0.918**
2013/14	**3,733**	**1,301**	**0.349**	**1,163**	**0.312**	**138**	**0.894**
2014/15	**4,036**	**1,360**	**0.337**	**1,085**	**0.269**	**275**	**0.798**
2015/16	**4,164**	**1,357**	**0.326**	**1,061**	**0.255**	**296**	**0.782**
2016/17	**4,284**	**1,349**	**0.315**	**1,000**	**0.233**	**349**	**0.741**
2017/18	**4,336**	**1,320**	**0.304**	**877**	**0.202**	**443**	**0.664**
2018/19	**4,406**	**1,297**	**0.294**	**753**	**0.171**	**544**	**0.581**
2019/20	**4,450**	**1,266**	**0.285**	**641**	**0.144**	**625**	**0.506**
2020/21	**4,654**	**1,280**	**0.275**	**576**	**0.124**	**704**	**0.450**
2021/22	**4,682**	**1,234**	**0.264**	**610**	**0.130**	**624**	**0.494**
2022/23	**4,706**	**1,189**	**0.253**	**590**	**0.125**	**599**	**0.496**
2023/24	**4,750**	**1,150**	**0.242**	**573**	**0.121**	**577**	**0.498**
2024/25	**4,777**	**1,108**	**0.232**	**526**	**0.110**	**582**	**0.475**
2025/26	**4,797**	**1,067**	**0.222**	**440**	**0.092**	**627**	**0.412**
2026/27	4,816	1,050	0.218	411	0.085	639	0.392
2027/28	4,846	1,035	0.214	400	0.083	635	0.387
2028/29	4,888	1,023	0.209	400	0.082	623	0.391
2029/30	4,909	1,007	0.205	374	0.076	633	0.371
2030/31	4,919	989	0.201	380	0.077	609	0.384
2031/32	4,924	970	0.197	330	0.067	640	0.340
2032/33	4,927	951	0.193	301	0.061	650	0.316
2033/34	4,932	933	0.189	279	0.057	654	0.299
2034/35	4,939	916	0.185	280	0.057	636	0.306
2035/36	4,945	898	0.182	270	0.055	628	0.301

Source: Applied Economics, 2025.
* Population age 5 through 13, corresponds with Kindergartern through 8th grade.
Bolding indicates historical data.

TABLE 24
CHAPARRAL NORTH COMMUNITY ENROLLMENT BY GRADE COHORT

	Enrollment by Level		K-8 Total		
Fall	K-5	6-8	Enrollment	Change	% Change
2010/11	**839**	**368**	**1,207**	**-2**	**-0.2%**
2011/12	**797**	**433**	**1,230**	**23**	**1.9%**
2012/13	**750**	**448**	**1,198**	**-32**	**-2.6%**
2013/14	**702**	**461**	**1,163**	**-35**	**-2.9%**
2014/15	**634**	**451**	**1,085**	**-78**	**-6.7%**
2015/16	**622**	**439**	**1,061**	**-24**	**-2.2%**
2016/17	**551**	**449**	**1,000**	**-61**	**-5.7%**
2017/18	**477**	**400**	**877**	**-123**	**-12.3%**
2018/19	**379**	**374**	**753**	**-124**	**-14.1%**
2019/20	**339**	**302**	**641**	**-112**	**-14.9%**
2020/21	**296**	**280**	**576**	**-65**	**-10.1%**
2021/22	**340**	**270**	**610**	**34**	**5.9%**
2022/23	**327**	**263**	**590**	**-20**	**-3.3%**
2023/24	**308**	**265**	**573**	**-17**	**-2.9%**
2024/25	**274**	**252**	**526**	**-47**	**-8.2%**
2025/26	**233**	**207**	**440**	**-86**	**-16.3%**
2026/27	216	195	411	-29	-6.6%
2027/28	220	180	400	-11	-2.7%
2028/29	189	211	400	0	0.0%
2029/30	171	203	374	-26	-6.5%
2030/31	155	225	380	6	1.6%
2031/32	156	174	330	-50	-13.2%
2032/33	150	151	301	-29	-8.8%
2033/34	144	135	279	-22	-7.3%
2034/35	141	139	280	1	0.4%
2035/36	138	132	270	-10	-3.6%

Source: Applied Economics, 2025.
Bolding indicates historical estimates.

5.1.4 Coronado Community

Despite steady growth in its population, the Coronado Community continues to experience declining enrollment across all grade levels, as shown in **Tables 25 and 26**. Recent additions to the housing supply have been majority multifamily, which has contributed to a strong decline in the Community's population per household. Since 2010/11, the population in the area has grown by nearly 8,830 people (21 percent), but the school-age population has declined by just over 1,770 people (36 percent). The rate of decline is expected to remain at about 2 percent throughout the projection period. As a result, K-12 enrollment is projected to fall to about 1,710 students by 2035/36. Nearly 65 percent of this loss could occur in the K-5 cohort, while 24 percent could occur in the 9-12 cohort.

TABLE 25
CORONADO COMMUNITY ENROLLMENT

		School-Age Population *		K-12 Enrollment			Enrollment -
Year	Households	Total	Per Household	Total	Per Household	Difference	Population Ratio
2010/11	**19,593**	**4,910**	**0.251**	**4,136**	**0.211**	**774**	**0.842**
2011/12	**19,723**	**4,700**	**0.238**	**4,002**	**0.203**	**698**	**0.852**
2012/13	**19,924**	**4,514**	**0.227**	**3,979**	**0.200**	**535**	**0.881**
2013/14	**19,984**	**4,305**	**0.215**	**3,682**	**0.184**	**623**	**0.855**
2014/15	**20,375**	**4,174**	**0.205**	**3,440**	**0.169**	**734**	**0.824**
2015/16	**20,807**	**4,053**	**0.195**	**3,356**	**0.161**	**697**	**0.828**
2016/17	**20,947**	**3,880**	**0.185**	**3,274**	**0.156**	**606**	**0.844**
2017/18	**21,038**	**3,705**	**0.176**	**3,037**	**0.144**	**668**	**0.820**
2018/19	**21,489**	**3,598**	**0.167**	**2,934**	**0.137**	**664**	**0.815**
2019/20	**21,963**	**3,497**	**0.159**	**2,820**	**0.128**	**677**	**0.806**
2020/21	**22,465**	**3,401**	**0.151**	**2,504**	**0.111**	**897**	**0.736**
2021/22	**23,195**	**3,381**	**0.146**	**2,366**	**0.102**	**1,015**	**0.700**
2022/23	**23,985**	**3,366**	**0.140**	**2,306**	**0.096**	**1,060**	**0.685**
2023/24	**24,618**	**3,327**	**0.135**	**2,260**	**0.092**	**1,067**	**0.679**
2024/25	**24,754**	**3,221**	**0.130**	**2,290**	**0.093**	**931**	**0.711**
2025/26	**25,037**	**3,137**	**0.125**	**2,173**	**0.087**	**964**	**0.693**
2026/27	25,883	3,161	0.122	2,141	0.083	1,020	0.677
2027/28	26,064	3,104	0.119	2,070	0.079	1,034	0.667
2028/29	26,586	3,087	0.116	2,006	0.075	1,081	0.650
2029/30	26,695	3,022	0.113	1,930	0.072	1,092	0.639
2030/31	27,337	3,017	0.110	1,916	0.070	1,101	0.635
2031/32	27,971	3,010	0.108	1,883	0.067	1,127	0.626
2032/33	28,632	3,004	0.105	1,887	0.066	1,117	0.628
2033/34	28,777	2,944	0.102	1,835	0.064	1,109	0.623
2034/35	29,071	2,900	0.100	1,776	0.061	1,124	0.612
2035/36	29,433	2,863	0.097	1,712	0.058	1,151	0.598

Source: Applied Economics, 2025.
* Population age 5 through 17, corresponds with Kindergartern through 12th grade.
Bolding indicates historical data.

TABLE 26
CORONADO COMMUNITY ENROLLMENT BY GRADE COHORT

	Enrollment by Level				K-12 Total		
Fall	K-5	6-8	K-8	9-12	Enrollment	Change	% Change
2010/11	**1,922**	**849**	**2,771**	**1,365**	**4,136**	**-78**	**-1.9%**
2011/12	**1,953**	**807**	**2,760**	**1,242**	**4,002**	**-134**	**-3.2%**
2012/13	**1,961**	**760**	**2,721**	**1,258**	**3,979**	**-23**	**-0.6%**
2013/14	**1,869**	**737**	**2,606**	**1,076**	**3,682**	**-297**	**-7.5%**
2014/15	**1,720**	**678**	**2,398**	**1,042**	**3,440**	**-242**	**-6.6%**
2015/16	**1,673**	**645**	**2,318**	**1,038**	**3,356**	**-84**	**-2.4%**
2016/17	**1,623**	**579**	**2,202**	**1,072**	**3,274**	**-82**	**-2.4%**
2017/18	**1,526**	**563**	**2,089**	**948**	**3,037**	**-237**	**-7.2%**
2018/19	**1,459**	**533**	**1,992**	**942**	**2,934**	**-103**	**-3.4%**
2019/20	**1,398**	**520**	**1,918**	**902**	**2,820**	**-114**	**-3.9%**
2020/21	**1,216**	**477**	**1,693**	**811**	**2,504**	**-316**	**-11.2%**
2021/22	**1,173**	**469**	**1,642**	**724**	**2,366**	**-138**	**-5.5%**
2022/23	**1,111**	**447**	**1,558**	**748**	**2,306**	**-60**	**-2.5%**
2023/24	**1,135**	**399**	**1,534**	**726**	**2,260**	**-46**	**-2.0%**
2024/25	**1,160**	**391**	**1,551**	**739**	**2,290**	**30**	**1.3%**
2025/26	**1,118**	**364**	**1,482**	**691**	**2,173**	**-117**	**-5.1%**
2026/27	1,108	378	1,486	655	2,141	-32	-1.5%
2027/28	1,051	380	1,431	639	2,070	-71	-3.3%
2028/29	994	408	1,402	604	2,006	-64	-3.1%
2029/30	923	414	1,337	593	1,930	-76	-3.8%
2030/31	906	393	1,299	617	1,916	-14	-0.7%
2031/32	887	359	1,246	637	1,883	-33	-1.7%
2032/33	880	334	1,214	673	1,887	4	0.2%
2033/34	857	325	1,182	653	1,835	-52	-2.8%
2034/35	837	319	1,156	620	1,776	-59	-3.2%
2035/36	820	313	1,133	579	1,712	-64	-3.6%

Source: Applied Economics, 2025.
Bolding indicates historical estimates.

5.1.5 Desert Mountain Community

The population of the Desert Mountain Community has increased by about 5 percent (3,550 people) since 2010/11, and the school-age population declined by about 12 percent (1,200 people) during the same period. The share of the population over 64 years of age in this community has risen from 17 percent in 2010 to an estimated 28 percent in 2025, and the share of persons in the prime parenting age group (25 to 44 years) has dropped from 24 percent to 20 percent. These demographic shifts are reflected in the area's declining enrollment, as shown in **Tables 27 and 28**. The school-age population is projected to continue to decline throughout the projection period, decreasing by about 780 persons (12.5 percent) over the next ten years. As a result, this community is projected to experience a net loss of nearly 700 students (9 percent), resulting in total enrollment of about 4,340 K-12 students by 2035/36. About 76 percent of the loss is expected to occur in the K-8 cohort.

TABLE 27
DESERT MOUNTAIN COMMUNITY ENROLLMENT

		School-Age Population *		K-12 Enrollment			
Year	Households	Total	Per Household	Total	Per Household	Difference	Enrollment - Population Ratio
2010/11	**29,660**	**9,950**	**0.335**	**7,584**	**0.256**	**2,366**	**0.762**
2011/12	**29,697**	**9,849**	**0.332**	**7,398**	**0.249**	**2,451**	**0.751**
2012/13	**29,801**	**9,771**	**0.328**	**7,122**	**0.239**	**2,649**	**0.729**
2013/14	**29,893**	**9,578**	**0.324**	**7,031**	**0.235**	**2,547**	**0.734**
2014/15	**29,977**	**9,605**	**0.320**	**6,639**	**0.221**	**2,966**	**0.691**
2015/16	**30,093**	**9,533**	**0.317**	**6,447**	**0.214**	**3,086**	**0.676**
2016/17	**30,216**	**9,462**	**0.313**	**6,125**	**0.203**	**3,337**	**0.647**
2017/18	**30,332**	**9,390**	**0.310**	**6,070**	**0.200**	**3,320**	**0.646**
2018/19	**30,446**	**9,318**	**0.306**	**5,935**	**0.195**	**3,383**	**0.637**
2019/20	**30,586**	**9,254**	**0.303**	**5,752**	**0.188**	**3,502**	**0.622**
2020/21	**30,704**	**9,184**	**0.299**	**5,614**	**0.183**	**3,570**	**0.611**
2021/22	**30,769**	**9,081**	**0.295**	**5,529**	**0.180**	**3,552**	**0.609**
2022/23	**30,894**	**8,996**	**0.291**	**5,512**	**0.178**	**3,484**	**0.613**
2023/24	**30,980**	**8,901**	**0.287**	**5,319**	**0.172**	**3,582**	**0.598**
2024/25	**31,067**	**8,807**	**0.283**	**5,311**	**0.171**	**3,496**	**0.603**
2025/26	**31,276**	**8,748**	**0.280**	**5,199**	**0.166**	**3,549**	**0.594**
2026/27	31,548	8,710	0.276	5,155	0.163	3,555	0.592
2027/28	31,596	8,610	0.272	5,006	0.158	3,604	0.581
2028/29	31,643	8,510	0.269	4,932	0.156	3,578	0.580
2029/30	31,694	8,413	0.265	4,823	0.152	3,590	0.573
2030/31	31,716	8,309	0.262	4,702	0.148	3,607	0.566
2031/32	31,801	8,249	0.259	4,648	0.146	3,601	0.563
2032/33	31,890	8,189	0.257	4,588	0.144	3,601	0.560
2033/34	31,914	8,113	0.254	4,480	0.140	3,633	0.552
2034/35	31,933	8,037	0.252	4,387	0.137	3,650	0.546
2035/36	31,992	7,971	0.249	4,344	0.136	3,627	0.545

Source: Applied Economics, 2025.
* Population age 5 through 17, corresponds with Kindergartern through 12th grade.
Bolding indicates historical data.

TABLE 28
DESERT MOUNTAIN COMMUNITY ENROLLMENT BY GRADE COHORT

	Enrollment by Level				K-12 Total		
Fall	K-5	6-8	K-8	9-12	Enrollment	Change	% Change
2010/11	**3,350**	**1,899**	**5,249**	**2,335**	**7,584**	**-101**	**-1.3%**
2011/12	**3,189**	**1,918**	**5,107**	**2,291**	**7,398**	**-186**	**-2.5%**
2012/13	**3,060**	**1,771**	**4,831**	**2,291**	**7,122**	**-276**	**-3.7%**
2013/14	**2,966**	**1,790**	**4,756**	**2,275**	**7,031**	**-91**	**-1.3%**
2014/15	**2,737**	**1,650**	**4,387**	**2,252**	**6,639**	**-392**	**-5.6%**
2015/16	**2,590**	**1,605**	**4,195**	**2,252**	**6,447**	**-192**	**-2.9%**
2016/17	**2,397**	**1,537**	**3,934**	**2,191**	**6,125**	**-322**	**-5.0%**
2017/18	**2,396**	**1,511**	**3,907**	**2,163**	**6,070**	**-55**	**-0.9%**
2018/19	**2,315**	**1,489**	**3,804**	**2,131**	**5,935**	**-135**	**-2.2%**
2019/20	**2,254**	**1,440**	**3,694**	**2,058**	**5,752**	**-183**	**-3.1%**
2020/21	**2,237**	**1,350**	**3,587**	**2,027**	**5,614**	**-138**	**-2.4%**
2021/22	**2,284**	**1,380**	**3,664**	**1,865**	**5,529**	**-85**	**-1.5%**
2022/23	**2,280**	**1,334**	**3,614**	**1,898**	**5,512**	**-17**	**-0.3%**
2023/24	**2,176**	**1,236**	**3,412**	**1,907**	**5,319**	**-193**	**-3.5%**
2024/25	**2,158**	**1,254**	**3,412**	**1,899**	**5,311**	**-8**	**-0.2%**
2025/26	**2,132**	**1,227**	**3,359**	**1,840**	**5,199**	**-112**	**-2.1%**
2026/27	2,044	1,258	3,302	1,853	5,155	-44	-0.8%
2027/28	1,956	1,274	3,230	1,776	5,006	-149	-2.9%
2028/29	1,909	1,247	3,156	1,776	4,932	-74	-1.5%
2029/30	1,877	1,147	3,024	1,799	4,823	-109	-2.2%
2030/31	1,782	1,124	2,906	1,796	4,702	-121	-2.5%
2031/32	1,759	1,108	2,867	1,781	4,648	-54	-1.1%
2032/33	1,737	1,110	2,847	1,741	4,588	-60	-1.3%
2033/34	1,719	1,046	2,765	1,715	4,480	-108	-2.4%
2034/35	1,699	1,037	2,736	1,651	4,387	-93	-2.1%
2035/36	1,684	1,027	2,711	1,633	4,344	-43	-1.0%

Source: Applied Economics, 2025.
Bolding indicates historical estimates.

5.1.6 Saguaro Community

As shown in Tables 29 and 30, enrollment in Saguaro Community schools has only increased in the five years since 2010/11. Because of these declines, the Community has lost about 420 students (11 percent) since 2010/11. This is despite the fact that the total population in the Saguaro Community increased by 15 percent. However, during the same time, the school-age population decreased by about 7 percent. Despite continued declines in the school-age population, enrollment is expected to stabilize somewhat over the next 10 years. As a result, 2035/36 enrollment in the Saguaro Community is projected to total about 3,250 K-12 students, which is a decrease of about 190 students, or 5 percent, compared to 2025/26 enrollment. The average loss could be about 1 percent per year between 2025/26 and 2030/31, but this could slow to about a 0.1 percent loss per year between 2030/31 and 2035/36. Unlike the other communities, the majority of the loss is in the 9-12 cohort, which could decline by about 300 students over the next decade. The K-8 cohort is actually expected to slightly increase by about 110 students by 2035/36 compared to 2025/26 enrollment.

TABLE 29
SAGUARO COMMUNITY ENROLLMENT

		School-Age Population *		K-12 Enrollment			Enrollment -
Year	Households	Total	Per Household	Total	Per Household	Difference	Population Ratio
2010/11	**22,064**	**4,341**	**0.197**	**3,855**	**0.175**	**486**	**0.888**
2011/12	**22,106**	**4,283**	**0.194**	**3,719**	**0.168**	**564**	**0.868**
2012/13	**22,410**	**4,276**	**0.191**	**3,686**	**0.164**	**590**	**0.862**
2013/14	**22,892**	**4,302**	**0.188**	**3,670**	**0.160**	**632**	**0.853**
2014/15	**23,431**	**4,336**	**0.185**	**3,449**	**0.147**	**887**	**0.795**
2015/16	**23,652**	**4,310**	**0.182**	**3,400**	**0.144**	**910**	**0.789**
2016/17	**23,695**	**4,252**	**0.179**	**3,462**	**0.146**	**790**	**0.814**
2017/18	**23,758**	**4,199**	**0.177**	**3,466**	**0.146**	**733**	**0.825**
2018/19	**24,080**	**4,191**	**0.174**	**3,449**	**0.143**	**742**	**0.823**
2019/20	**24,259**	**4,158**	**0.171**	**3,527**	**0.145**	**631**	**0.848**
2020/21	**24,604**	**4,153**	**0.169**	**3,627**	**0.147**	**526**	**0.873**
2021/22	**24,822**	**4,125**	**0.166**	**3,528**	**0.142**	**597**	**0.855**
2022/23	**24,894**	**4,074**	**0.164**	**3,624**	**0.146**	**450**	**0.890**
2023/24	**25,182**	**4,057**	**0.161**	**3,518**	**0.140**	**539**	**0.867**
2024/25	**25,387**	**4,027**	**0.159**	**3,451**	**0.136**	**576**	**0.857**
2025/26	**25,774**	**4,026**	**0.156**	**3,440**	**0.133**	**586**	**0.854**
2026/27	25,958	4,002	0.154	3,393	0.131	609	0.848
2027/28	25,989	3,955	0.152	3,322	0.128	633	0.840
2028/29	26,338	3,956	0.150	3,353	0.127	603	0.848
2029/30	26,554	3,936	0.148	3,297	0.124	639	0.838
2030/31	26,786	3,919	0.146	3,277	0.122	642	0.836
2031/32	27,020	3,902	0.144	3,272	0.121	630	0.839
2032/33	27,426	3,909	0.143	3,260	0.119	649	0.834
2033/34	27,709	3,898	0.141	3,211	0.116	687	0.824
2034/35	28,091	3,900	0.139	3,211	0.114	689	0.823
2035/36	28,651	3,926	0.137	3,254	0.114	672	0.829

Source: Applied Economics, 2025.
* Population age 5 through 17, corresponds with Kindergartern through 12th grade.
Bolding indicates historical data.

TABLE 30
SAGUARO COMMUNITY ENROLLMENT BY GRADE COHORT

		Enrollment by Level				K-12 Total		
Fall	PS	K-5	6-8	K-8	9-12	Enrollment	Change	% Change
2010/11	**76**	**1,554**	**905**	**2,459**	**1,396**	**3,855**	**-30**	**-0.8%**
2011/12	**89**	**1,558**	**863**	**2,421**	**1,298**	**3,719**	**-136**	**-3.5%**
2012/13	**89**	**1,531**	**820**	**2,351**	**1,335**	**3,686**	**-33**	**-0.9%**
2013/14	**104**	**1,468**	**837**	**2,305**	**1,365**	**3,670**	**-16**	**-0.4%**
2014/15	**138**	**1,314**	**812**	**2,126**	**1,323**	**3,449**	**-221**	**-6.0%**
2015/16	**103**	**1,320**	**783**	**2,103**	**1,297**	**3,400**	**-49**	**-1.4%**
2016/17	**23**	**1,357**	**814**	**2,171**	**1,291**	**3,462**	**62**	**1.8%**
2017/18	**20**	**1,331**	**853**	**2,184**	**1,282**	**3,466**	**4**	**0.1%**
2018/19	**101**	**1,296**	**893**	**2,189**	**1,260**	**3,449**	**-17**	**-0.5%**
2019/20	**168**	**1,340**	**904**	**2,244**	**1,283**	**3,527**	**78**	**2.3%**
2020/21	**126**	**1,342**	**883**	**2,225**	**1,402**	**3,627**	**100**	**2.8%**
2021/22	**151**	**1,353**	**782**	**2,135**	**1,393**	**3,528**	**-99**	**-2.7%**
2022/23	**154**	**1,347**	**799**	**2,146**	**1,478**	**3,624**	**96**	**2.7%**
2023/24	**154**	**1,331**	**779**	**2,110**	**1,408**	**3,518**	**-106**	**-2.9%**
2024/25	**141**	**1,397**	**751**	**2,148**	**1,303**	**3,451**	**-67**	**-1.9%**
2025/26	**137**	**1,428**	**713**	**2,141**	**1,299**	**3,440**	**-11**	**-0.3%**
2026/27	135	1,436	711	2,147	1,246	3,393	-47	-1.4%
2027/28	132	1,431	757	2,188	1,134	3,322	-71	-2.1%
2028/29	133	1,465	771	2,236	1,117	3,353	31	0.9%
2029/30	131	1,514	705	2,219	1,078	3,297	-56	-1.7%
2030/31	130	1,542	661	2,203	1,074	3,277	-20	-0.6%
2031/32	130	1,520	670	2,190	1,082	3,272	-5	-0.2%
2032/33	130	1,508	722	2,230	1,030	3,260	-12	-0.4%
2033/34	128	1,489	746	2,235	976	3,211	-49	-1.5%
2034/35	128	1,489	745	2,234	977	3,211	0	0.0%
2035/36	130	1,501	750	2,251	1,003	3,254	43	1.3%

Source: Applied Economics, 2025.
Bolding indicates historical estimates.

5.2 Enrollment by Attendance Area

For analysis purposes, the grid level data within the District is summed to generate enrollment estimates by current school attendance areas, as was shown on **Map 1** previously. **Tables 31 and 31B** display the projected enrollment by attendance area for 2026/27 through 2035/36 based on current student data and demographic trends. This table is based solely on the attendance area designated for District students' place of residence, regardless of which school they actually attend. The data provides a direct link to the demographic analysis and is used to predict enrollment by school in Section 5.3. It includes a designation for out-of-District students, and excludes schools that do not have specific attendance areas (Echo Canyon, Cheyenne Traditional and Pueblo Elementary School).

Among elementary and middle school attendance areas (K-5 and K-8), Redfield (640 students) and Yavapai (510 students) attendance are projected to have the largest number of students by 2035/36, although neither area is expected to see an increase in the number of students. Only three attendance areas are projected to have more than 500 students each by the end of the projection period. With 250 students or fewer, the smallest attendance areas in 2035/36 are expected to be Sequoya (230 students) and Desert Canyon (250 students). In all, 20 of the 21 elementary and middle attendance areas are projected to see enrollment decreases over the next 10 years, ranging from about 30 students (Ingleside) to about 190 students (Tonalea). The only gain is expected in the Mohave attendance area, with a gain of nearly 70 students. During the first five years of the projection period, there could be a loss of about 890 K-8 students, which could slow during the second half of the projection period to a loss of about 710 students. Altogether, K-8 attendance area enrollment could decline by about 1,600 students (13 percent) over the next 10 years.

Among high schools, the Desert Mountain attendance area is currently the largest with 1,710 students. Although the area is expected to lose nearly 390 students over the next decade, it will continue to be the largest attendance area in 2035/36 with almost 1,330 students. None of the high school attendance areas are projected to have a gain in students. The two largest declines in enrollment are Desert Mountain (-390 students) and Coronado (-210 students) attendance areas. The number of 9-12 students from outside the District is projected to decline by about 90 students. However, it is important to note that more than 2,000 students come from outside the District, which is greater than enrollment in any of the attendance areas. By 2030/31, high school attendance area enrollment could fall by about 190 students, which could accelerate to a loss of 610 students between 2030/31 and 2035/36 as the declining K-8 cohort progresses.

TABLE 31
ACTUAL AND PROJECTED ENROLLMENT BY ATTENDANCE AREA

Attendance Area	2015/16	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2035/36	2015/16-2020/21	2020/21-2025/26	2025/26-2030/31	2030/31-2035/36
Ingleside Middle School	591	551	538	513	455	509	467	501	531	553	525	485	441	-40	-84	18	-44
Hopi Elementary School	516	623	663	651	608	604	591	590	568	569	554	544	494	107	-32	-47	-50
Tavan Elementary School	654	430	396	405	377	411	398	380	357	350	336	323	294	-224	-32	-75	-29
Cocopah Middle School	660	615	654	629	535	534	524	546	577	571	547	508	448	-45	-91	-16	-61
Cherokee Elementary School	307	325	433	379	349	347	350	342	326	325	321	306	272	18	25	-44	-34
Cochise Elementary School	442	379	412	435	427	415	415	410	388	370	355	341	299	-63	36	-74	-43
Sequoya Elementary School	336	320	338	337	320	337	308	290	274	264	259	255	228	-16	-12	-53	-27
Copper Ridge School	887	567	589	575	547	500	422	387	367	355	329	317	259	-320	-145	-105	-58
Hohokam Traditional School	350	297	319	338	335	369	373	375	365	365	356	350	329	-53	76	-23	-21
Pima Elementary School	396	377	346	363	326	348	315	310	294	295	299	303	283	-19	-62	-12	-20
Tonalea K-8 / Middle	1,175	1,032	1,039	663	608	619	591	517	467	436	433	417	399	-143	-441	-174	-18
Yavapai Elementary School	432	340	321	530	531	561	555	546	549	539	542	545	511	-92	215	-10	-34
Desert Canyon Middle School	788	660	638	608	577	615	593	632	610	585	547	554	498	-128	-67	-39	-55
Desert Canyon Elementary School	471	329	344	342	322	301	292	278	273	276	270	265	247	-142	-37	-27	-18
Redfield Elementary School	837	822	814	815	800	800	766	739	721	710	694	678	636	-15	-56	-88	-42
Mountainside Middle School	670	524	556	546	496	483	450	453	444	431	378	363	341	-146	-74	-87	-22
Anasazi Elementary School	559	426	424	418	401	361	402	376	367	360	361	349	332	-133	-24	-53	-17
Laguna Elementary School	479	408	422	376	346	335	324	316	292	299	296	298	286	-71	-84	-26	-12
Mohave Middle School	566	569	497	496	464	435	443	495	564	610	579	557	510	3	-126	114	-47
Kiva Elementary School	376	389	356	344	326	338	377	379	369	359	352	345	315	13	-12	-32	-30
Navajo Elementary School	698	575	584	592	585	590	584	558	535	516	502	491	484	-123	9	-93	-7
Out of District	2,802	2,634	2,710	2,636	2,835	2,736	2,793	2,827	2,875	2,876	2,909	2,849	2,831	-168	159	56	-19
Total	14,992	13,192	13,393	12,991	12,570	12,548	12,333	12,249	12,114	12,015	11,742	11,445	10,736	-1,800	-859	-888	-709

Source: Scottsdale Unified School District, Applied Economics, 2025.

TABLE 31B (continued)
ACTUAL AND PROJECTED ENROLLMENT BY ATTENDANCE AREA

Attendance Area	2015/16	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2035/36	2015/16-2020/21	2020/21-2025/26	2025/26-2030/31	2030/31-2035/36
Arcadia High School	1,013	1,060	966	981	888	883	808	776	792	758	811	865	794	47	-252	57	-71
Chaparral High School	1,422	1,420	1,359	1,299	1,174	1,156	1,071	1,014	1,008	1,058	1,105	1,135	990	-2	-349	64	-145
Coronado High School	1,170	969	908	924	860	889	877	903	947	972	916	856	672	-201	-92	-21	-185
Desert Mountain High	2,190	2,034	1,889	1,877	1,776	1,747	1,710	1,616	1,567	1,566	1,542	1,563	1,325	-156	-324	-147	-238
Saguaro High School	938	843	868	873	833	787	773	713	640	624	658	705	742	-95	-70	-68	37
Out of District	1,692	1,919	1,897	1,994	2,119	2,089	2,170	2,133	2,080	2,074	2,036	2,091	2,085	227	251	-79	-6
Total	8,425	8,245	7,887	7,948	7,650	7,551	7,409	7,153	7,033	7,051	7,069	7,216	6,607	-180	-836	-193	-609

Source: Scottsdale Unified School District, Applied Economics, 2025.

5.3 Enrollment by School versus by Attendance Area

In order to translate the projections of enrollment by attendance area (place of residence) into enrollment by school, it is necessary to quantify the relationship between the place of residence and school of attendance. This is accomplished by analyzing the relationship between the two based on current student information. **Tables 32 and 33** display the distributions of enrollment by school versus enrollment by attendance area for elementary/middle and high school students in 2025/26. These patterns at the school level provide an informative view of the flow of students between schools and from outside the District. It also provides insight into the success of each school in serving students within their own attendance area and attracting students from outside of their attendance area. In terms of school of attendance, these tables include schools that do not have a specific geography or attendance area, such as Echo Canyon, Pueblo, and Cheyenne Traditional School, just as they also include students from outside the District.

In the tables below, the gray shaded numbers reflect students whose residence area and school of attendance are the same. The columns at the right break out the number of students from outside the District, total school enrollment, the number who reside within the District, and the net difference between the number of students attending a school and those residing within the attendance area. For example, at Arcadia High School, there are 718 students enrolled who also live in the Arcadia attendance area. There are six students at Arcadia who reside in the Chaparral (2000) attendance area, 71 from Coronado, and so on. There are 867 students from outside the District who attend Arcadia, resulting in a total enrollment of 1,709 students. The Arcadia attendance area contains 808 resident students, although 20 attend Chaparral, 23 are at Coronado, and so forth. Arcadia has a net gain of 901 students, and the school captures 89 percent of the District students living within its attendance area, which is the highest percent of any of the high schools in the District.

Overall, only 64 percent of the K-8 students from within the District attend the school designated for their place of residence, while 77 percent of the 9-12 students attend the designated school for their area of residence. It is logical that high school students would exhibit a higher rate than the K-8 students because of the larger size of the attendance areas; however, it is important to note that the Coronado attendance area captured a much lower share of their resident students (54 percent) than the other high schools.

The difference between each school's enrollment and the number of students that reside within the attendance area provides an estimate of the net impact of in-migration and out-migration on enrollment. Since Cheyenne Traditional, Echo Canyon, and Pueblo Elementary do not have defined attendance areas, their net difference is 100 percent of enrollment. With more than 360 students, Cocopah Middle School had the largest net addition among K-8 schools with defined attendance areas. The K-8 schools with the highest net losses in enrollment include Redfield Elementary (-390 students) and Tonalea (-230 students).

TABLE 32
SCHOOL VERSUS ATTENDANCE AREA ENROLLMENT (K-8th GRADE): 2025/26

School Attended / School ID		School Attendance Area of Residence																				Outside District	Total Attend	Total Reside	Diff.	Reside 2022/23	Change
		100	101	102	200	201	202	203	301	403	401	402	404	500	501	502	600	601	602	700	701	702						
Ingleside Middle	100	422			3				1	47										29			258	760	467	293	513	-46
Hopi Elementary	101		529	35		1					1	3	13								1	2	71	656	591	65	651	-60
Tavan Elementary	102		8	245							3	4	9			1					1	2	301	574	398	176	405	-7
Echo Canyon K-8	103	16	13	31			2			12	2	12	16							5	4	4	140	257	0	257	0	
Cocopah Middle	200	9			487				5	9				40			25			50			261	886	524	362	629	-105
Cherokee Elementary	201		9	8		306	16	52	1			4	1		1	5			2		34	4	198	641	350	291	379	-29
Cochise Elementary	202		3	1		6	351	11	3		2	5			3	51		10	26		54	17	36	579	415	164	435	-20
Sequoya Elementary	203			1		19	3	217					4			10		6	2		5	2	283	552	308	244	337	-29
Copper Ridge	301				4	1			278	2				21	9	8	8	2	3				104	440	422	18	575	-153
Tonalea Middle	403	5			1					285				1			1			3			68	364	591	-227	663	-72
Hohokam Traditional	401		2	6			1	1			234	34	110								1	15	74	478	373	105	338	35
Pima Elementary	402		1	13		1					30	143	38			2					2	23	42	295	315	-20	363	-48
Yavapai Elementary	404			5							7	15	250									5	63	345	555	-210	530	25
Desert Canyon Middle	500	1			7				15	4				313			24			1			53	418	593	-175	608	-15
Desert Canyon Elementary	501						0	1	26		1		2		208	95		15	9		4	1	62	424	292	132	342	-50
Redfield Elementary	502						4	3	12		1				12	274		17	14		1	3	35	376	766	-390	815	-49
Cheyenne Traditional	503				8	2	9	12	74	2			1	141	49	247	72	69	71	8	5	5	150	925	0	925	0	
Mountainside Middle	600				8				3	3				70			313			2			106	505	450	55	546	-96
Anasazi Elementary	601			1			1		1		3				3	26		233	16		2		122	408	402	6	418	-16
Laguna Elementary	602					3	4	0	2		1	1	1		6	34		41	170		5	2	33	303	324	-21	376	-52
Mohave Middle	700	14			6					227				7			7			345			107	713	443	270	496	-53
Kiva Elementary	701		20	45		7	7	8			15	17	23			4		1	2		220	90	102	561	377	184	344	33
Navajo Elementary	702		3	2			1		1		36	36	39			3					10	254	50	435	584	-149	592	-8
Pueblo Elementary	703		3	5		4	16	3			37	40	47			6		7	8		28	155	73	432	0	432	0	
Other												1	1		1			1	1				1	6	0	6		
Total		467	591	398	524	350	415	308	422	591	373	315	555	593	292	766	450	402	324	443	377	584	2,793	12,333	9,540	2,793	10,355	-815
Total Attending School of Residence Area																									6,077			
Percent Attending School of Residence Area		90%	90%	62%	93%	87%	85%	70%	66%	48%	63%	45%	45%	53%	71%	36%	70%	58%	52%	78%	58%	43%			64%			

Source: Scottsdale Unified School District, Applied Economics, 2025.

All of the high schools except Coronado (-190 students) currently have a net in-migration of students. Arcadia has the largest net addition with about 900 students, and it also attracts the largest number of out-of-District students (870 students). To put this into perspective, just over 50 percent of the students at Arcadia do not live in the District. Including students from outside the District and from other District attendance areas and, 58 percent of Arcadia students do not live in the Arcadia attendance area. Chaparral follows with the second largest net addition (620 students) and the second largest number of out-of-District students (510 students). Chaparral also has the second-highest attendance-residence ratio at 84 percent. While Coronado benefited from the addition of nearly 180 out-of-district students, the school only captured 54 percent of the students who reside within its attendance area, which resulted in the net loss of about 190 students.

TABLE 33
SCHOOL VERSUS ATTENDANCE AREA ENROLLMENT (9th-12th GRADE): 2025/26

		School Attendance Area of Residence						Outside	Total	Total		Reside	
School Attended		1000	2000	3000	4000	5000	6000	District	Attend	Reside	Difference	2022/23	Change
Arcadia High School	1000	718	6		71	4	43	867	1,709	808	901	981	-173
Chaparral High School	2000	20	685	183	14	189	89	509	1,689	1,071	618	1,299	-228
Coronado High School	4000	23	1		473		19	175	691	877	-186	924	-47
Desert Mountain High	5000	2	43	57	4	1,402	16	316	1,840	1,710	130	1,877	-167
Saguaro High School	6000	30	58	7	290	69	589	256	1,299	773	526	873	-100
Scottsdale Online Learning		13	16	11	14	44	15	43	156	0	156		
SCORE / Other		2	4		11	2	2	4	25	0	25		
Total		808	813	258	877	1,710	773	2,170	7,409	5,239	2,170	5,954	-715
Total Attending School for Residence Area										4,050			
Percent Attending School of Residence Area		89%	84%	71%	54%	82%	76%			77%			

Source: Scottsdale Unified School District, Applied Economics, 2025.
Note that attendance area 3000 is Chaparral North.

5.4 Enrollment by School

Tables 34 and 35 show projected enrollment by school for 2026/27 through 2035/36 for both the elementary/middle (K-8) and high schools. These projections were derived by combining the attendance area projections with data on the number of intra-district transfers and the number of students from outside the District at each school. Among the 24 K-8 schools, only one, Mohave Middle School, is projected to experience an increase in enrollment over the next ten years. The largest decline is expected at Copper Ridge School with a loss of about 140 students, followed by a loss of about 135 students at Tonalea Middle School. The lowest elementary/middle school enrollment loss is expected at Echo Canyon, with a loss of only about 10 students. Total K-8 enrollment could equal about 10,740 students by 2035/36, which is a decline of 1,600 students (13 percent) from 2025/26 enrollment.

At the high school level, all five schools are expected to experience enrollment decreases over the next ten years. The largest loss during the projection period is expected at Desert Mountain (-300 students). While Desert Mountain is currently the largest high school, it could be surpassed by Arcadia by the end of the projection period. Coronado will likely continue to be the smallest of the five high schools with enrollment of just 560 students in 2035/36. Total 9-12 enrollment could equal almost 6,610 students by 2035/36, which is a decline of about 800 students (11 percent) from 2025/26 enrollment.

TABLE 34
ELEMENTARY ENROLLMENT BY SCHOOL

School Attended	2015/16	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2035/36	2015/16-2020/21	2020/21-2025/26	2025/26-2030/31	2030/31-2035/36
Ingleside Middle School	756	811	795	778	755	788	760	804	840	858	823	778	714	55	-51	18	-64
Hopi Elementary School	848	710	729	678	643	675	656	650	623	610	592	567	529	-138	-54	-89	-38
Tavan Elementary School	721	596	566	571	565	550	574	558	546	538	539	528	484	-125	-22	-46	-44
Echo Canyon K-8	472	340	319	311	318	281	257	252	257	259	252	235	247	-132	-83	-22	12
Cocopah Middle School	886	913	897	886	845	859	886	920	946	932	901	861	795	27	-27	-25	-66
Cherokee Elementary School	534	632	667	648	625	624	641	635	617	620	620	604	555	98	9	-37	-49
Cochise Elementary School	613	590	619	613	605	575	579	572	543	527	512	500	462	-23	-11	-79	-38
Sequoya Elementary School	482	518	577	528	542	553	552	546	543	543	539	522	493	36	34	-30	-29
Copper Ridge School	1,061	576	610	590	573	526	440	397	382	385	362	358	299	-485	-136	-82	-59
Hohokam Traditional School	427	491	320	416	426	461	478	488	486	465	457	456	456	64	-13	-22	0
Pima Elementary School	528	410	363	350	348	319	295	293	282	264	251	240	261	-118	-115	-55	21
Tonalea K-8 / Middle	335	788	798	447	399	391	364	307	259	232	233	222	229	453	-424	-142	7
Yavapai Elementary School	383	0	161	345	361	380	345	334	329	327	310	313	281	-383	345	-32	-32
Desert Canyon Middle School	563	481	492	490	417	419	418	449	427	405	370	378	334	-82	-63	-40	-44
Desert Canyon Elementary	472	440	477	485	443	422	424	417	409	397	415	396	367	-32	-16	-28	-29
Redfield Elementary School	438	466	424	425	421	403	376	356	337	331	321	312	279	28	-90	-64	-33
Cheyenne Traditional School	984	904	899	881	872	931	925	916	913	938	933	923	925	-80	21	-2	2
Mountainside Middle School	689	542	565	551	537	512	505	507	527	503	445	425	403	-147	-37	-80	-22
Anasazi Elementary School	573	396	425	437	404	411	408	368	348	350	345	324	327	-177	12	-84	3
Laguna Elementary School	476	359	372	346	318	313	303	308	291	291	294	304	272	-117	-56	1	-32
Mohave Middle School	783	883	782	799	779	751	713	748	818	861	829	808	761	100	-170	95	-47
Kiva Elementary School	478	534	516	510	525	564	561	566	549	552	562	550	500	56	27	-11	-50
Navajo Elementary School	346	384	424	422	409	426	435	416	396	377	377	380	345	38	51	-55	-35
Pueblo Elementary School	496	424	413	415	397	407	432	436	440	444	457	458	418	-72	8	26	-40
Other	16	4	183	69	43	7	6	6	6	6	3	3	0	-12	2	-3	-3
Total	15,005	13,192	13,393	12,991	12,570	12,548	12,333	12,249	12,114	12,015	11,742	11,445	10,736	-1,813	-859	-888	-709

Source: Scottsdale Unified School District, Applied Economics, 2025.

TABLE 35
HIGH SCHOOL ENROLLMENT BY SCHOOL

School	2015/16	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2035/36	2015/16-2020/21	2020/21-2025/26	2025/26-2030/31	2030/31-2035/36
Arcadia High School	1,752	1,728	1,587	1,613	1,613	1,677	1,709	1,683	1,699	1,685	1,710	1,753	1,639	-24	-19	44	-114
Chaparral High School	2,086	2,277	2,133	2,054	1,869	1,773	1,689	1,576	1,539	1,583	1,590	1,625	1,491	191	-588	-64	-134
Coronado High School	1,038	811	724	748	726	739	691	681	688	671	656	644	560	-227	-120	-47	-84
Desert Mountain High	2,252	2,027	1,865	1,898	1,907	1,899	1,840	1,793	1,749	1,748	1,727	1,764	1,541	-225	-187	-76	-223
Saguaro High School	1,297	1,402	1,393	1,478	1,408	1,303	1,299	1,249	1,199	1,217	1,240	1,285	1,231	105	-103	-14	-54
On-line / SCORE / Other			185	157	127	160	181	171	160	147	145	145	145	0	181	-36	0
Total	8,425	8,245	7,887	7,948	7,650	7,551	7,409	7,153	7,034	7,051	7,068	7,216	6,607	-180	-836	-193	-609

Source: Scottsdale Unified School District, Applied Economics, 2025.

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Planning Technician
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Progress Managing Editor
Scottsdale Progress

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