SCOTTSDALE UNIFIED SCHOOL DISTRICT
DEMOGRAPHIC AND ENROLLMENT ANALYSIS
2020/21

Final Report
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APPLIED ECONOMICS

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Executive Summary

This report presents the key findings of the 2020/21 Demographic and Enrollment Analysis update performed for the Scottsdale Unified School District (District) by Applied Economics. The purpose of this analysis is to identify current and historic demographic, development and enrollment trends, and to anticipate future trends to create District, Community and sub-District enrollment projections through 2030/31. The update includes new student enrollment data, along with revised residential real estate market and development information. This summary describes some of the key findings from the report.

Enrollment Trends - Enrollment in the District has declined gradually over the past decade. Prior to this year, Kindergarten to 12th grade (K-12) enrollment dropped by an average of 1.2 percent per year, cumulatively resulting in a loss of nearly 1,400 students between 2015/16 and 2019/20. 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. This year K-12 enrollment totaled roughly 21,400 students, which represents a decrease of 3.6 percent (nearly 800 students) compared to 2019/20; this dramatic decline was due to the anomalous effects of the COVID-19 pandemic, which had a particularly strong impact on the youngest grades. Roughly 4,600 of the District's K-12 students (21.7 percent) reside outside District boundaries. Out-of-District enrollment has grown by 19.5 percent since 2010/11, resulting in the addition of about 760 K-12 students, while in-District enrollment dropped by about 5,300 students (a 24 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 50 percent single family units and 50 percent multifamily units. The majority of the new housing built since 2010 has been multifamily.

Historic Construction Activity - New housing development in the District has been dominated by multifamily projects over the past ten years and apartment construction has accounted for about 70 percent of total growth. About 15 percent of the remaining new housing has been low-density, single family, with other single family (townhouse or condominiums) filling out the rest. None of these types of housing are likely to generate significant amounts of school-age people. Redevelopment of residential and commercial properties can be expected to continue as land values increase, particularly in the southern portion in the District.

Future Development Potential - The future residential potential in the District is estimated to be about 19,000 units. This new supply is expected to be similar to the additions to inventory in recent years, with multifamily accounting for about 75 percent of the total and single family additions expected to be primarily low-density properties. Most of the multifamily developments are expected to be high-amenity projects, some of which will be higher elevation complexes, especially in the downtown area. In some cases the redevelopment properties will take the place of older residential units. In such cases the net additions would be lower, and in some cases the replacement projects could be less family-oriented.

Alternative Education Providers - There are currently 21 charter schools operating within the District's boundaries, serving 7,800 K-12 students. Since 2014/15, charter enrollment has increased by nearly 3,700 K-12 students. Interestingly, charter enrollment increases since 2018/19 have been limited to about 100 students per year. While not all of these charter school students reside in the District, there has been an enormous increase in the number of charter schools in the area; these schools can be found throughout the District but are often located in close proximity to major transportation corridors and in established areas with higher population densities. In 2020 there were also 27 private schools (up from 16 schools seven years ago) operating in locations throughout the District with enrollment totaling roughly 4,400 K-12 students.

District Enrollment Projections - District K-12 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 840 students (3.9 percent) over the next ten years, dropping to 20,594 by 2030/31. Following the return next year of some of the students that were "lost" due to the COVID-19 pandemic, there should only be slight fluctuations from one year to the next, resulting in a steady decline in enrollment over the projection period. The post-recession drop in K-5 enrollment will continue to impact both 6-8 and 9-12 enrollment during the projection period, which are each expected to decline by an average of 0.7 and 0.9 percent per year, respectively. Slight K-5 enrollment gains during the first half of the projection period are expected to be offset somewhat by small losses during the second five-year period, resulting in average annual enrollment growth of just 0.2 percent over the next 10 years.

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 63 percent of the Kindergarten through 8th grade students from within the District's boundary attend the school designated for their place of residence, while about 80 percent of the 9th through 12th grade students attend the designated school for their area of residence.

Among the 24 elementary and middle schools, 12 are projected to have increases in enrollment over the next ten years, with modest growth ranging from just one student to 115 students each. The most growth is expected at Yavapai Elementary School with 115 new students, followed by Redfield Elementary with 108 additional students. Enrollment at both Tavan Elementary and Copper Ridge School is expected to decline by more than 130 students each over the next ten years.

At the high school level, four of the five schools are expected to experience enrollment decreases over the next ten years; only Saguaro High School is projected to see a small enrollment gain (64 students) by 2030/31. The largest loss during the projection period is expected at Desert Mountain (-416 students). Chaparral currently has the largest enrollment, with 2,277 students, followed by Desert Mountain at 2,027 students. Chaparral is still expected to be the largest high school at the end of the projection period, with enrollment of 2,121 students, followed again by Desert Mountain with enrollment totaling 1,611 students. Coronado will continue to be the smallest of the five high schools with enrollment of just 767 students in 2030/31.

TABLE OF CONTENTS

Executive Summary i

1.0 Introduction 1

2.0 Existing Conditions 4

2.1 Enrollment 4

2.2 Demographic Trends 15

2.3 Alternative Providers 19

3.0 Residential Development 24

3.1 Market Conditions 24

3.2 Housing Construction 27

3.3 Residential Development 29

3.3.1 Future Development Potential 29

3.3.2 Development Projects 35

4.0 District Projections 37

4.1 Population & Housing 37

4.2 Enrollment 38

5.0 Sub-District Projections 42

5.1 Enrollment Trends by Community 45

5.1.1 Arcadia Community 46

5.1.2 Chaparral Community 47

5.1.3 Chaparral North Community 48

5.1.4 Coronado Community 49

5.1.5 Desert Mountain Community 50

5.1.6 Saguaro Community 51

5.2 Enrollment by Attendance Area 52

5.3 Enrollment by School versus by Attendance Area 55

5.4 Enrollment by School 58

Acknowledgements 61

1.0 Introduction

This report presents the key findings of the 2020/21 Demographic and Enrollment Analysis update performed for the Scottsdale Unified School District (District) by Applied Economics. The purpose of this analysis is to identify current and historic demographic, development and enrollment trends, and to anticipate future trends to create District, Community and sub-District enrollment projections through 2030/31. The District-level projections incorporate long-term demographic and housing trends for the District and projected trends for the region to create a top-down analysis of population and 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 boundary, the six high school Communities (attendance areas), and the 343 study grids.

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

- Section 2.0 reviews existing demographic and development conditions and provides enrollment information for the District. This chapter details demographic trends in the District in order to help understand current changes in enrollment. Finally, charter and private school enrollment data is presented for providers operating within and nearby District boundaries to help explain recent enrollment changes as compared to changes in the school-age population.

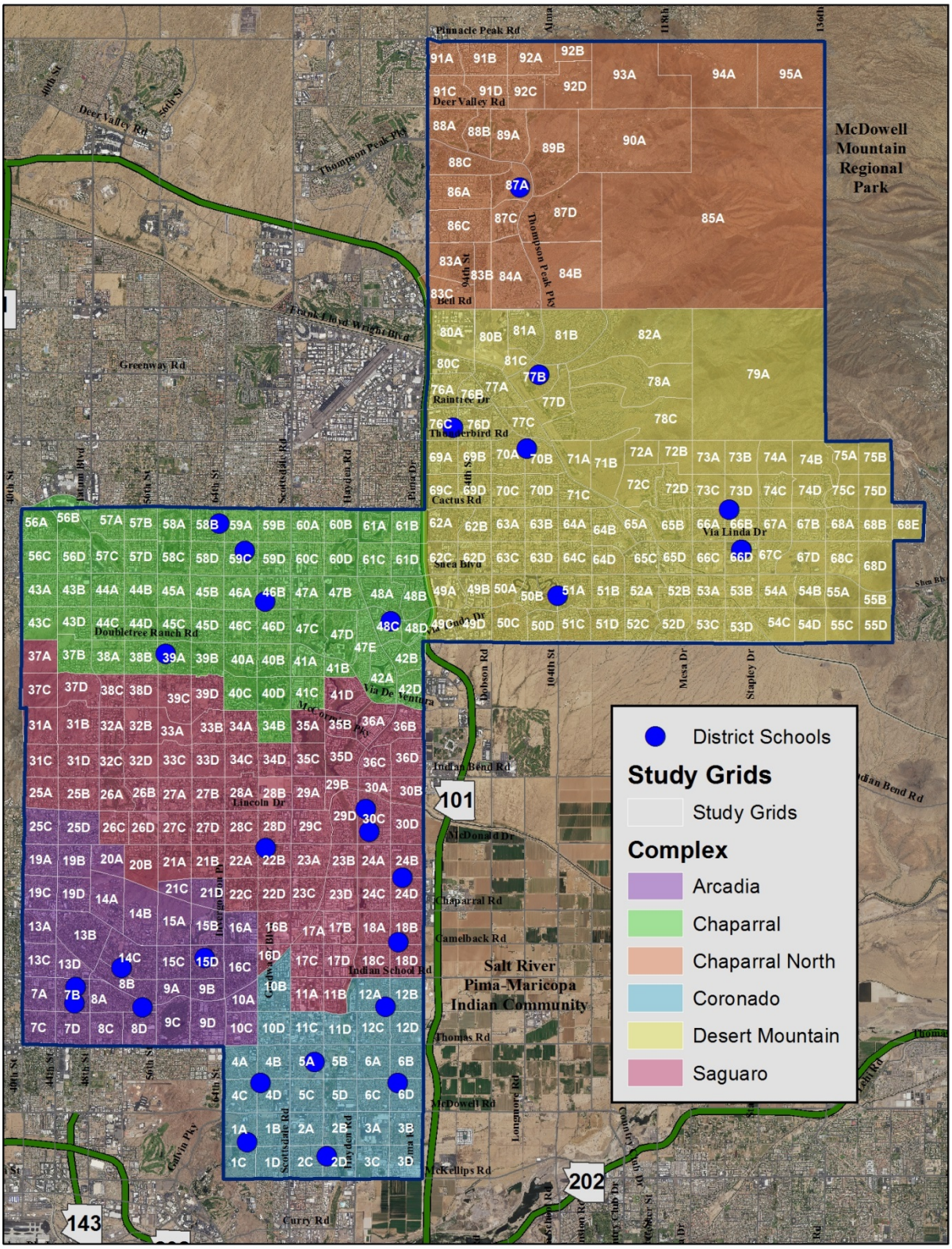
- Section 3.0, Residential Development, presents information on current construction activity, vacancy rates and the potential future supply of new housing by unit type. It provides estimates for the timing of construction based on current activity, ownership and zoning status for vacant land available for residential development as well as area growth forecasts. The housing potential is segmented both by the type of housing product and the timing of specific housing projects within the district, which leads to the future distribution of enrollment.

- Section 4.0 combines the demographic and residential development trends derived from the information presented in sections 2.0 and 3.0 to project District-level enrollment by grade for the 10-year period. These projections are developed in a top-down fashion, using long-term trends in enrollment, housing starts and completions, and student generation. Finally, the section presents sub-District enrollment projections and the corresponding impact on student population in current attendance areas. The information in this section is helpful because it identifies the geographical areas of growth using visual representations of the ten-year enrollment projections for the grid planning areas within the District.

- Section 5.0, Sub-District Projections, details enrollment projections by attendance area and school. District-level student generation rates are combined with expected housing additions, demographic trends and capture rates at the study area level to estimate future enrollment by place of residence. This study area data is aggregated to form projections by attendance area. The relationship between the number of students that reside within an attendance area and enrollment illustrates 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



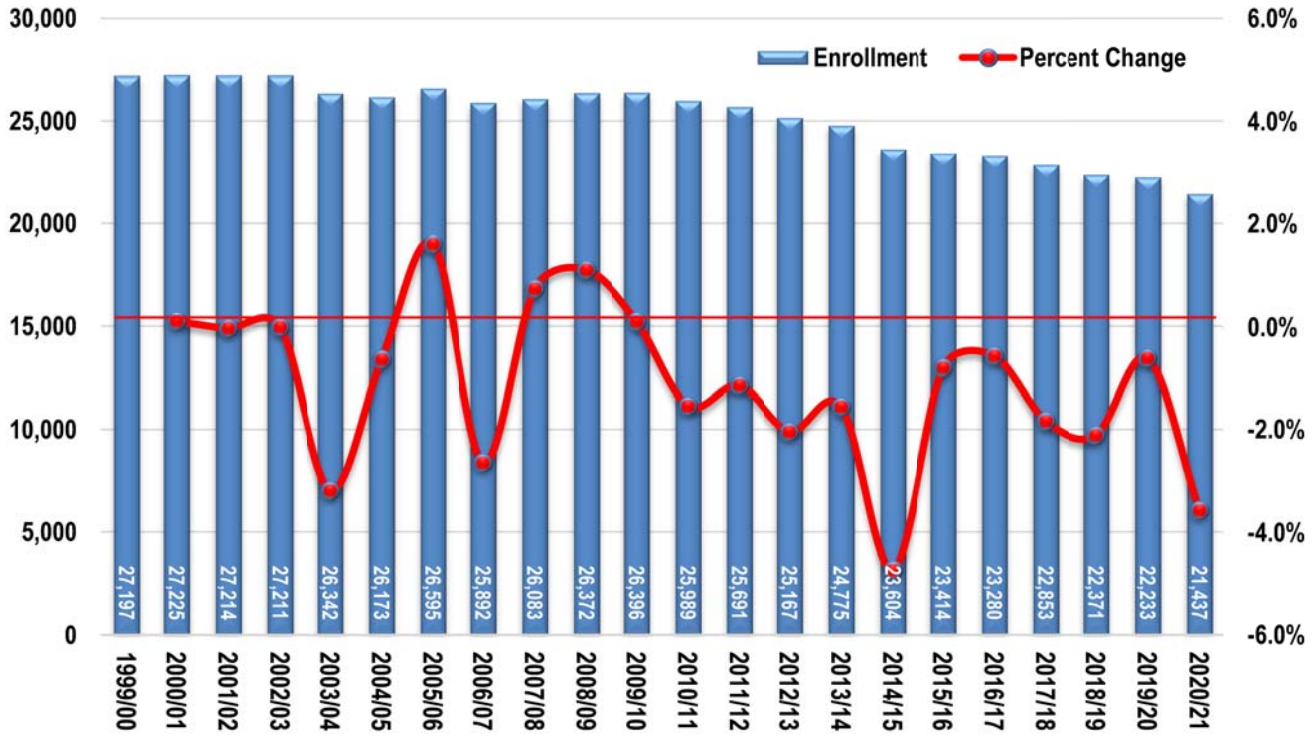
2.0 Existing Conditions

2.1 Enrollment

Enrollment in the District has declined gradually over the past decade. Prior to this year, Kindergarten to 12th grade (K-12) enrollment dropped by an average of 1.2 percent per year, cumulatively resulting in a loss of nearly 1,400 students between 2015/16 and 2019/20. 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. This year K-12 enrollment totaled roughly 21,400 students, which represents a decrease of 3.6 percent (nearly 800 students) compared to 2019/20; this dramatic decline was due to the anomalous effects of the COVID-19 pandemic, which had a particularly strong impact on the youngest grades.

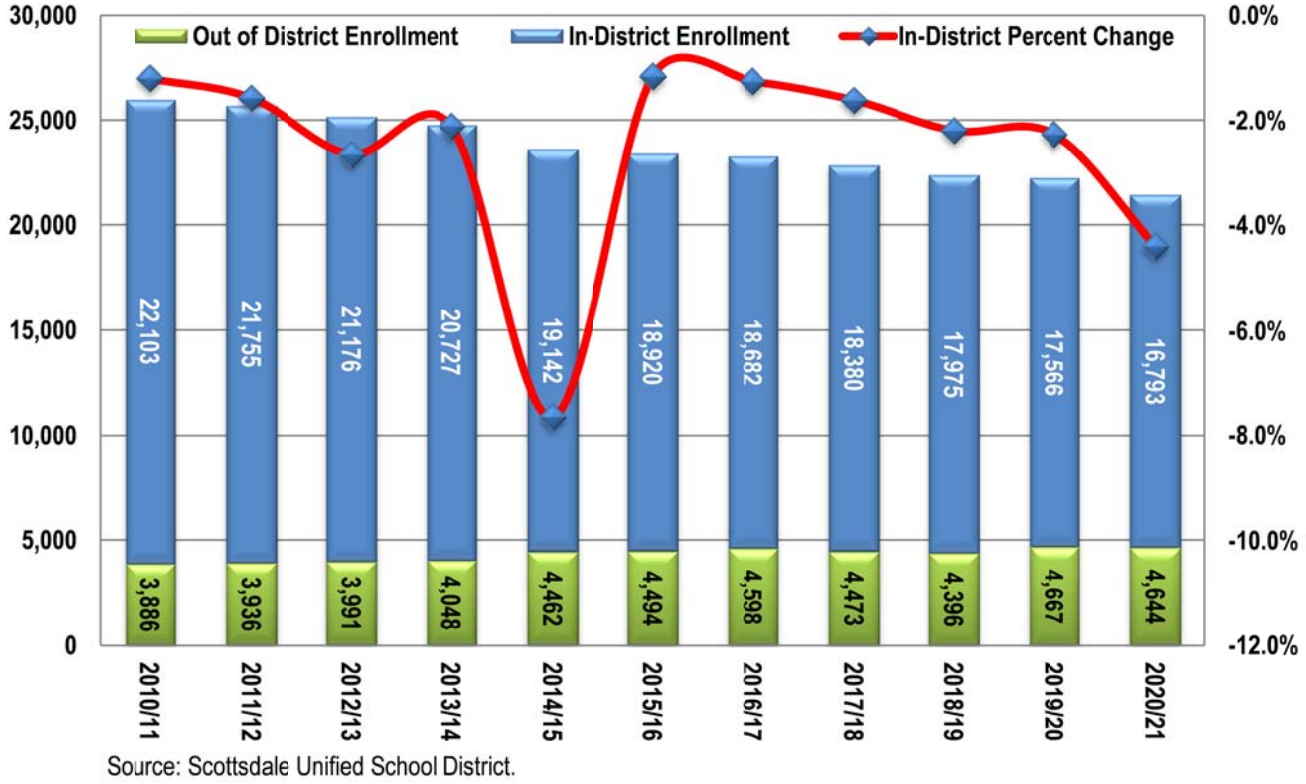
As shown in **Figure 1**, K-12 enrollment peaked in 2000/01, at approximately 27,225 students, but has fallen every year since 2009/10, despite the fact that housing units have continued to be added and the District continues to attract a significant number of students from outside of the District. In fact, out-of-District enrollment continues to be a significant factor for the District. In all, roughly 4,600 of the District's K-12 students (21.7 percent) reside outside District boundaries, which is relatively high compared to most metro area districts (**Figure 2**). Out-of-District enrollment has grown by 19.5 percent since 2010/11, resulting in the addition of about 760 K-12 students, while in-District enrollment dropped by about 5,300 students (a 24 percent decline) during the same period.

FIGURE 1
HISTORIC ENROLLMENT



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

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 Community Complex 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.

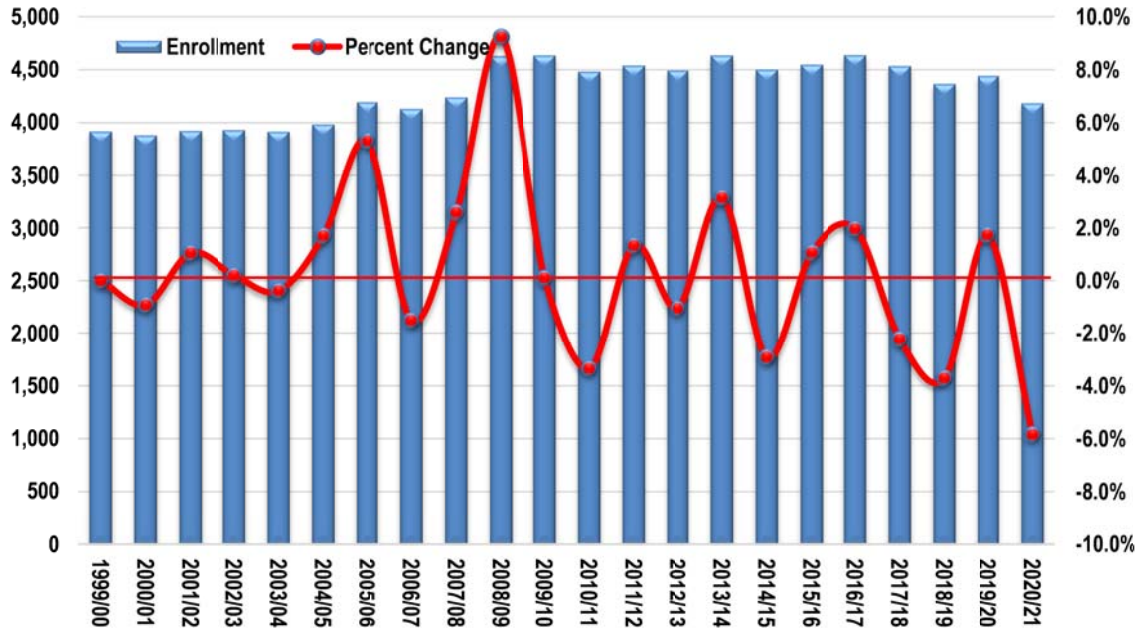
There are currently 4,185 K-12 students in Arcadia Community schools. From 2010/110 to 2019/20, enrollment in this community was quite stable, declining by just 0.4 percent per year on average, including five years with modest increases in enrollment. By comparison, District K-12 enrollment has declined by an average of 1.7 percent per year during the same ten-year period. This year enrollment in the Arcadia Community declined by nearly six percent (259 students) compared to 2019/20; the majority of this loss (51 percent) was due to a decline in 9th through 12th grade (9-12) enrollment, while the drop in 6th to 8th grade (6-8) enrollment accounted for another 30 percent of the total enrollment decline. Historically, however, the most significant losses in the Arcadia Community schools have been at the Kindergarten to 5th grade (K-5) level, where enrollment declined by nearly 17 percent between 2010/11 and 2019/20.

Chaparral is the only community that has shown a net increase over the past 11 years, growing at an average rate of 0.6 percent per year from 2010/11 to 2019/20 and declining by just 2.3 percent (118 students) this year. At roughly 4,900 K-12 students, 2020/21 enrollment in the Chaparral Community continued to be higher than total enrollment in 2010/11 (4,700 students). Although the community experienced overall declines in five of the last 11 years, growth in high school enrollment of about one percent per year on average offset a slight average annual loss in 6-8 enrollment.

The Chaparral North Community represents the northeastern part of the Chaparral High School attendance area and includes just 576 Kindergarten to 8th grade (K-8) students. Since 2009/10, K-8 enrollment has declined every year except one (2011/12) and losses in the past four years have increased sharply (ranging from 10 to 15 percent); interestingly, the 10.1 percent drop in enrollment this year (65 students) was the smallest decline seen since 2016/17. Recent enrollment declines at the K-5 level are likely due to the fact that Great Hearts moved its Archway Scottsdale campus into this community (at 94th Street, south of Bell Road) in 2018/19 and opened the school year with nearly 900 K-5 students; in 2020/21 the school enrolled nearly 1,100 K-5 students.

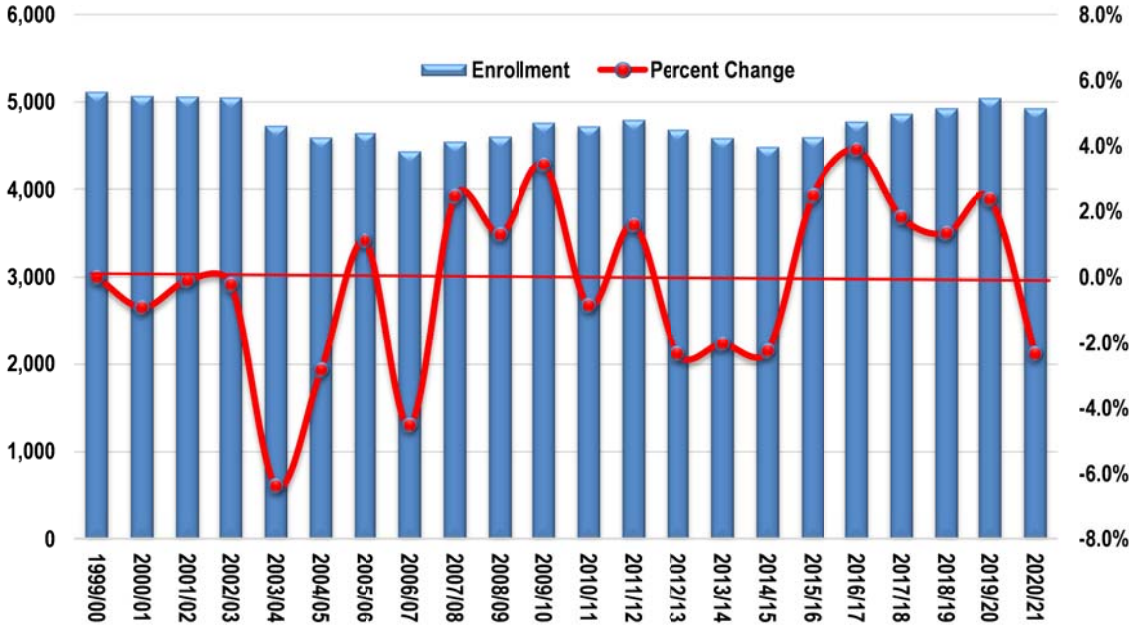
Enrollment in Coronado Community schools has declined every year since 2008/09; between 2010/11 and 2019/20 enrollment declined significantly, dropping by 3.9 percent per year on average. This year, enrollment declined by more than 11 percent (316 students) compared to 2019/20. Historically, the losses in this community have occurred across all of the grade levels, but were slightly larger in the 6-8 cohort; this year the largest decline occurred in K-5 enrollment, which accounted for nearly 58 percent of the total annual decrease.

FIGURE 3A
ENROLLMENT AND ENROLLMENT CHANGE
ARCADIA COMMUNITY



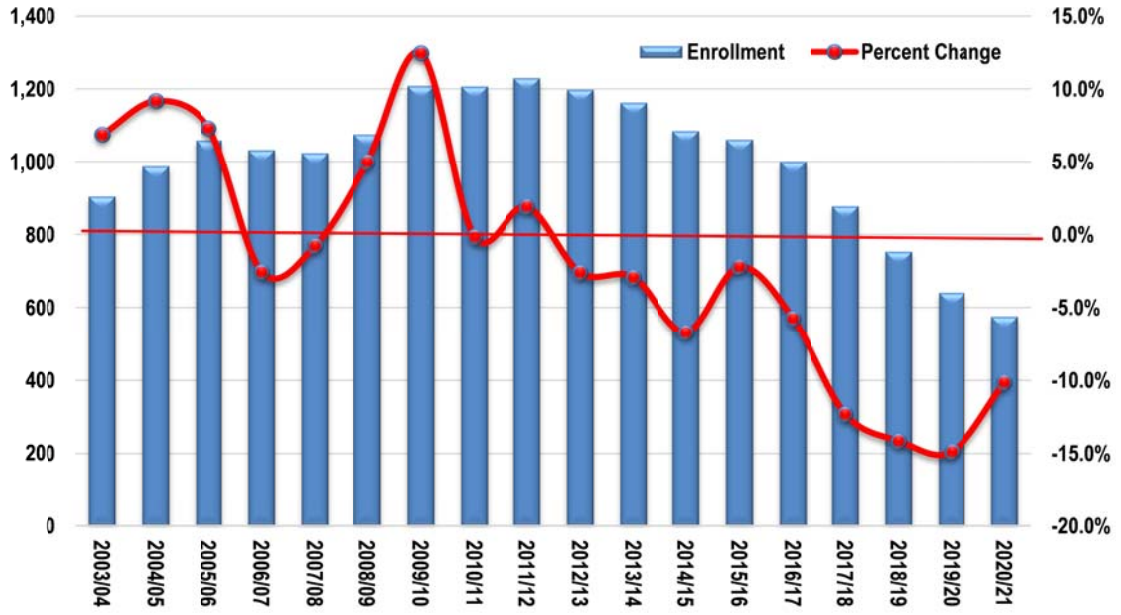
Source: Scottsdale Unified School District.

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



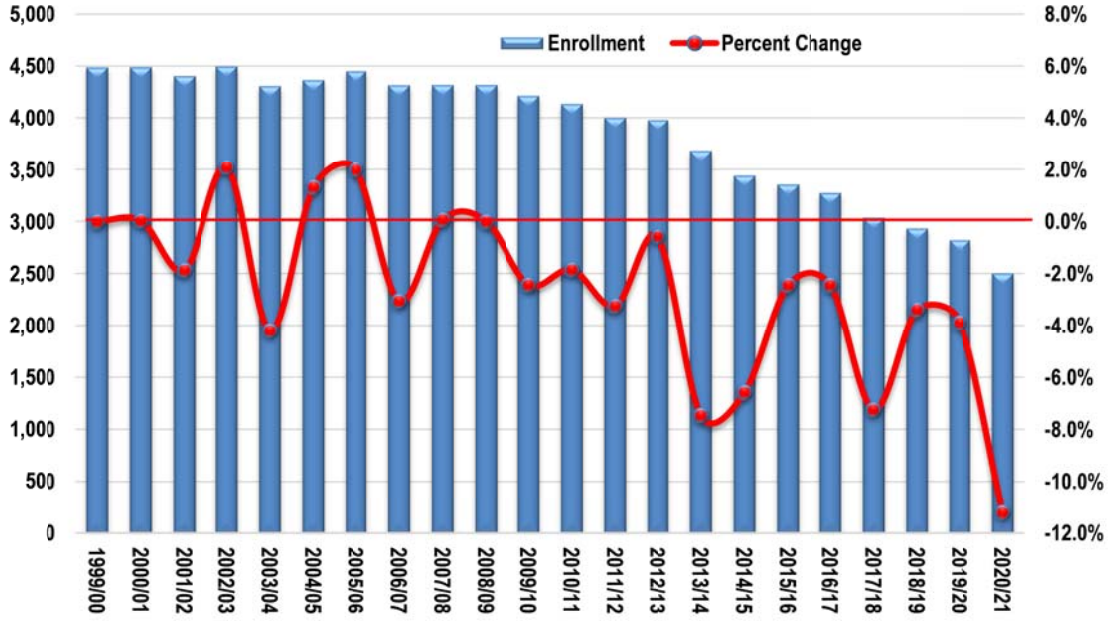
Source: Scottsdale Unified School District.

FIGURE 3C
ENROLLMENT AND ENROLLMENT CHANGE
CHAPPARAL NORTH COMMUNITY



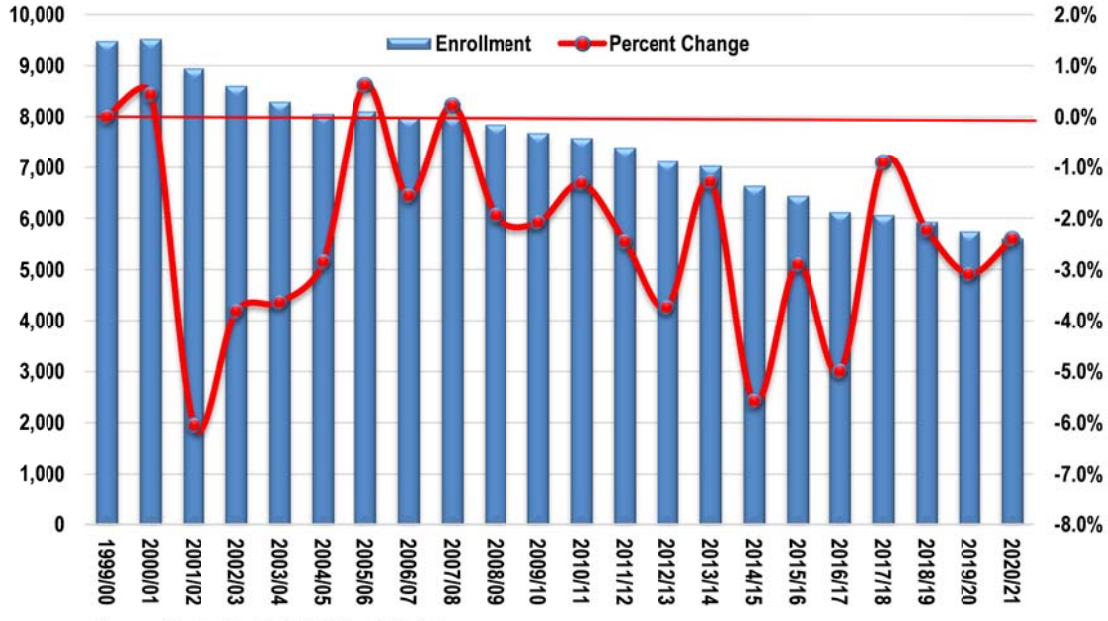
Source: Scottsdale Unified School District.

FIGURE 3D
ENROLLMENT AND ENROLLMENT CHANGE
CORONADO COMMUNITY



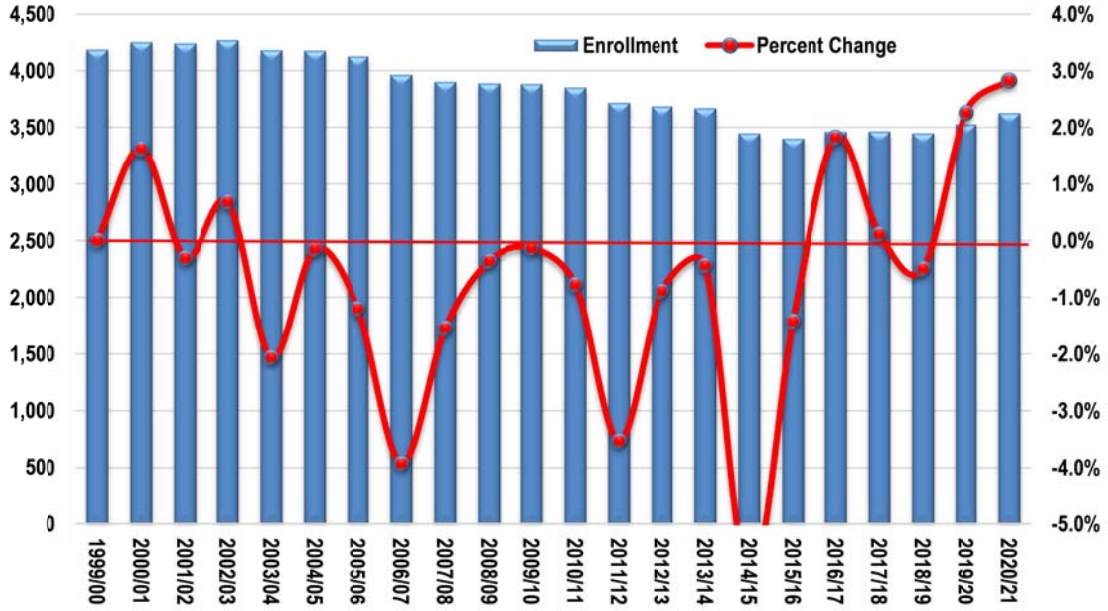
Source: Scottsdale Unified School District.

FIGURE 3E
ENROLLMENT AND ENROLLMENT CHANGE
DESERT MOUNTAIN COMMUNITY



Source: Scottsdale Unified School District.

FIGURE 3F
ENROLLMENT AND ENROLLMENT CHANGE
SAGUARO COMMUNITY



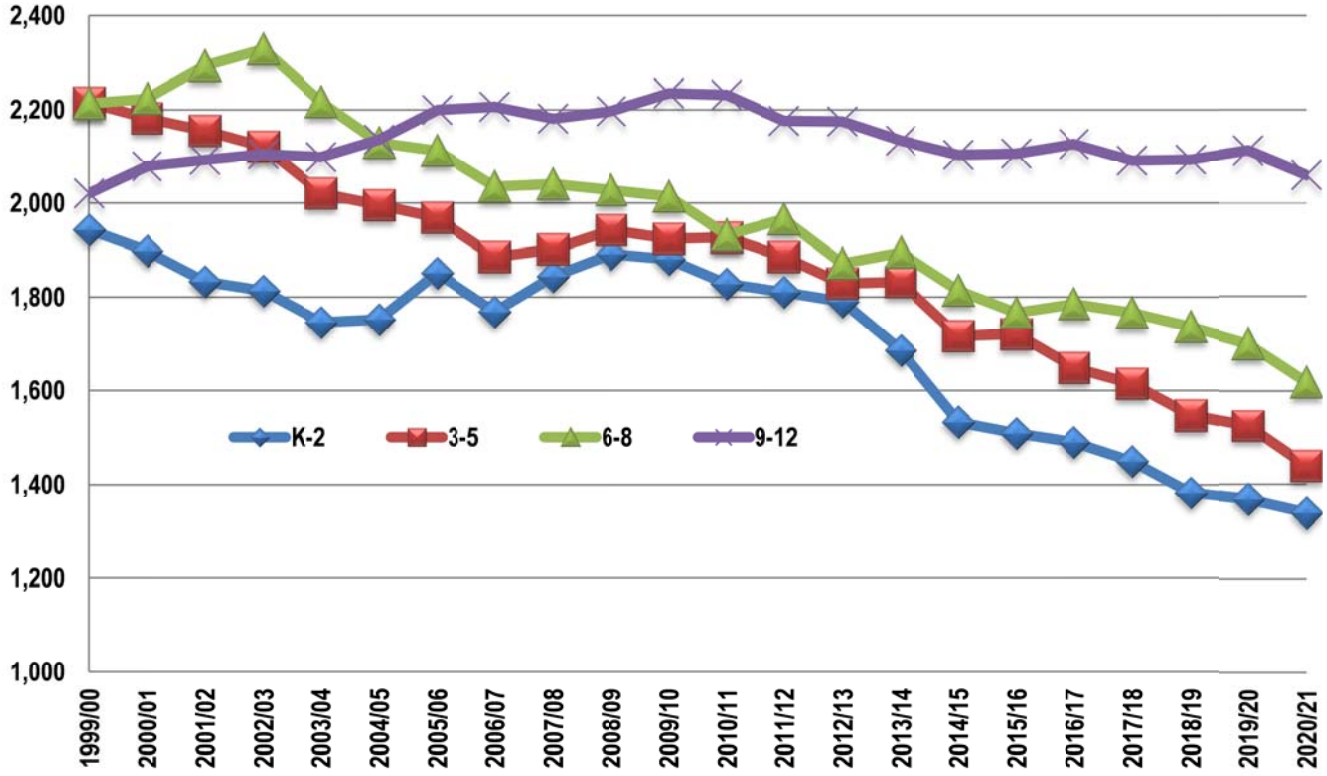
Source: Scottsdale Unified Schcol District.

With 5,614 K-12 students in 2020/21, enrollment in the Desert Mountain Community schools is significantly larger than the other communities, but enrollment has been steadily decreasing (2.8 percent per year on average) and is now down nearly 2,000 students compared to 2010/11 total enrollment. With an annual decline of 2.4 percent this year, which is consistent with recent annual enrollment changes, the community seems to have been largely unaffected by the COVID-19 pandemic. Although there have been enrollment declines in all of the grade levels, losses in the K-5 cohort account for about 57 percent of the decrease over the past 11 years. This trend reflects the aging of the households in the community and the fact that parents of younger students are more likely to choose charter schools or other alternative providers than older students.

The Saguaro Community currently has 3,627 K-12 students in its schools, which represents a 2.8 percent increase (100 students) over 2019/20 that was driven by a 119-student increase in 9-12 enrollment; it is the only community to experience an enrollment increase despite the effects of the COVID-19 pandemic. While Saguaro is one of the smaller communities, enrollment has been relatively stable since 2010/11 and has increased by more than two percent in each of the last two years; the largest annual decline during this period (6.0 percent) occurred in 2014/15. Similar to other communities, the most significant losses have been at the K-5 level, with enrollment at the 6-8 and 9-12 grade levels remaining relatively unchanged over the past ten 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 levels. **Figure 4** displays the average enrollment by grade level in District schools since 1999/00. Average enrollment in the 9th to 12th grade (9-12) cohort remains the largest by far, which is indicative of a mature, move-up community.

FIGURE 4
AVERAGE ENROLLMENT PER GRADE BY COHORT



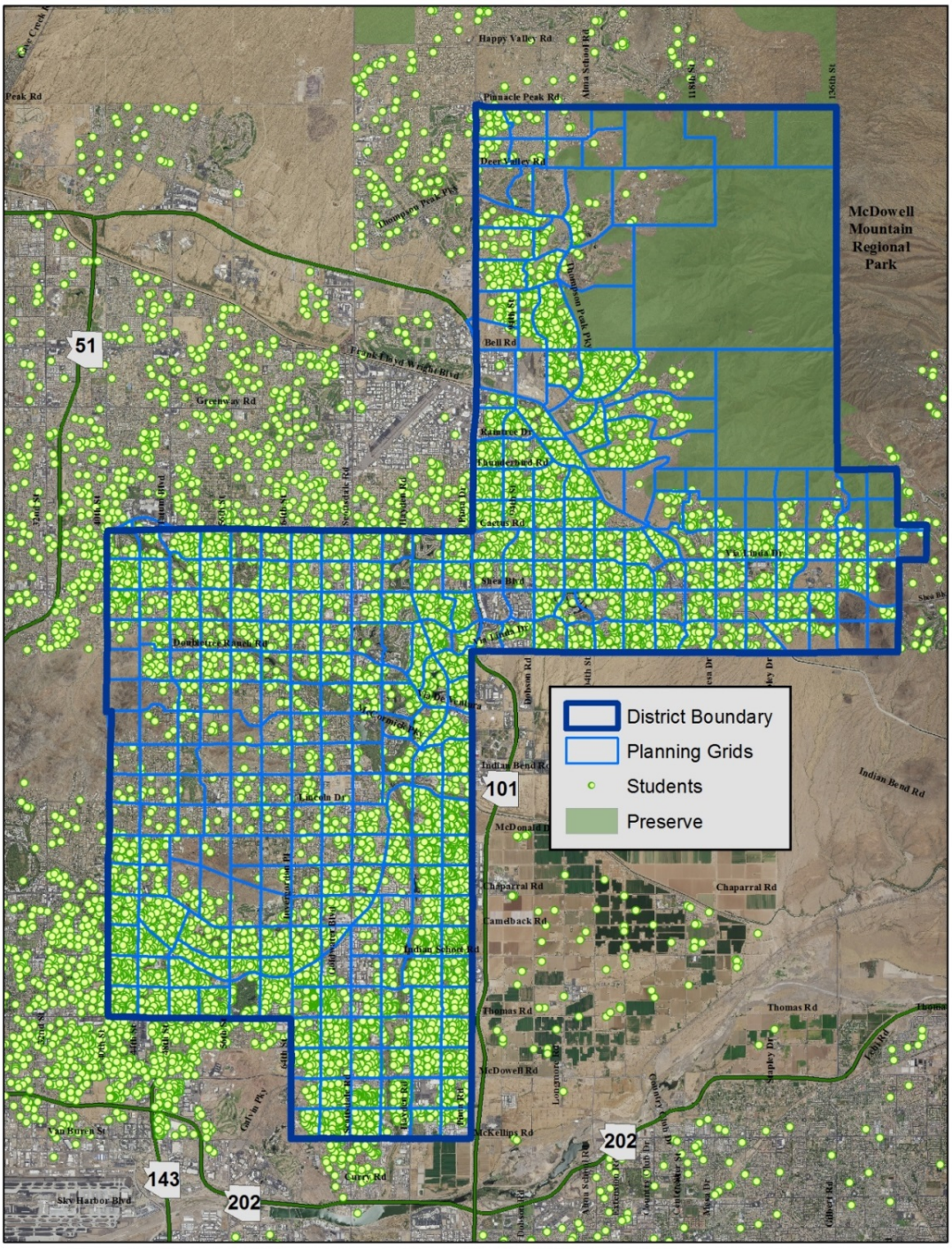
Sources: Arizona Department of Education; Scottsdale Unified School District.

Due to the anomalous effects of the COVID-19 pandemic, average grade-level enrollment declined in all four cohorts this year. Prior to this year, average 9-12 enrollment was stable at about 2,100 students per grade. The 6-8 cohort continues to be the second largest, although enrollment per grade has been declining steadily since 2017/18; despite these declines, the cohort has consistently remained larger than the two younger grade cohorts, which is again reflective of the move-up nature of much of the housing market in the District. The Kindergarten to 2nd grade (K-2) and 3rd to 5th grade (3-5) cohorts have both experienced somewhat larger average grade-level enrollment declines recently, likely due to increasing home prices in much of the District and increased competition from charter 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, to a greater extent in some cohorts than others.

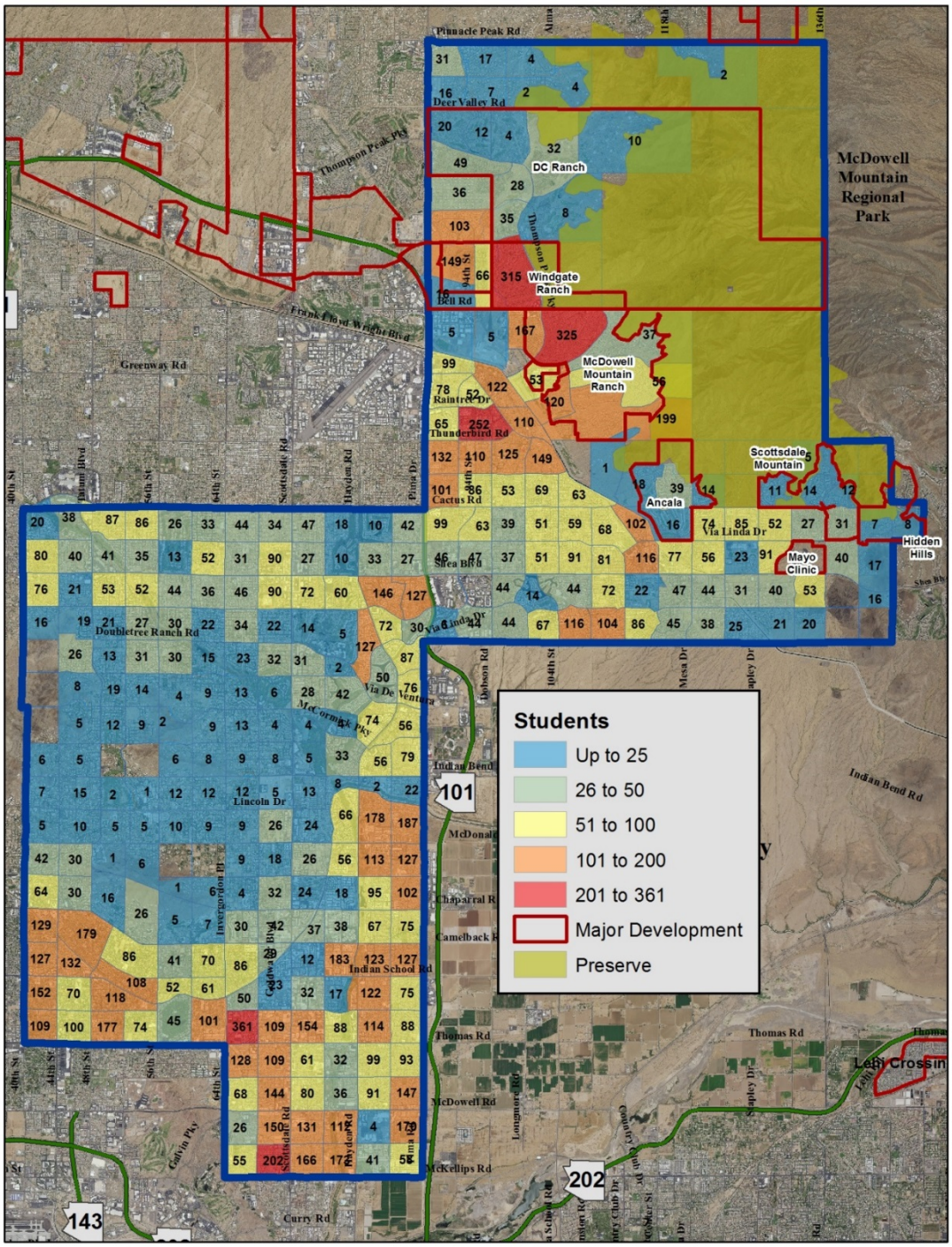
In addition to looking at enrollment by grade, it is also useful to analyze the geographic distribution of students. **Map 2** shows the current point location of students attending District schools. Note that this map includes students that reside within the District and those who reside in surrounding 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. There are also notable concentrations of out-of-District students north of Cactus Road and in Fountain Hills.

MAP 2
GEOGRAPHIC DISTRICT DISTRIBUTION OF STUDENTS: 2020/21



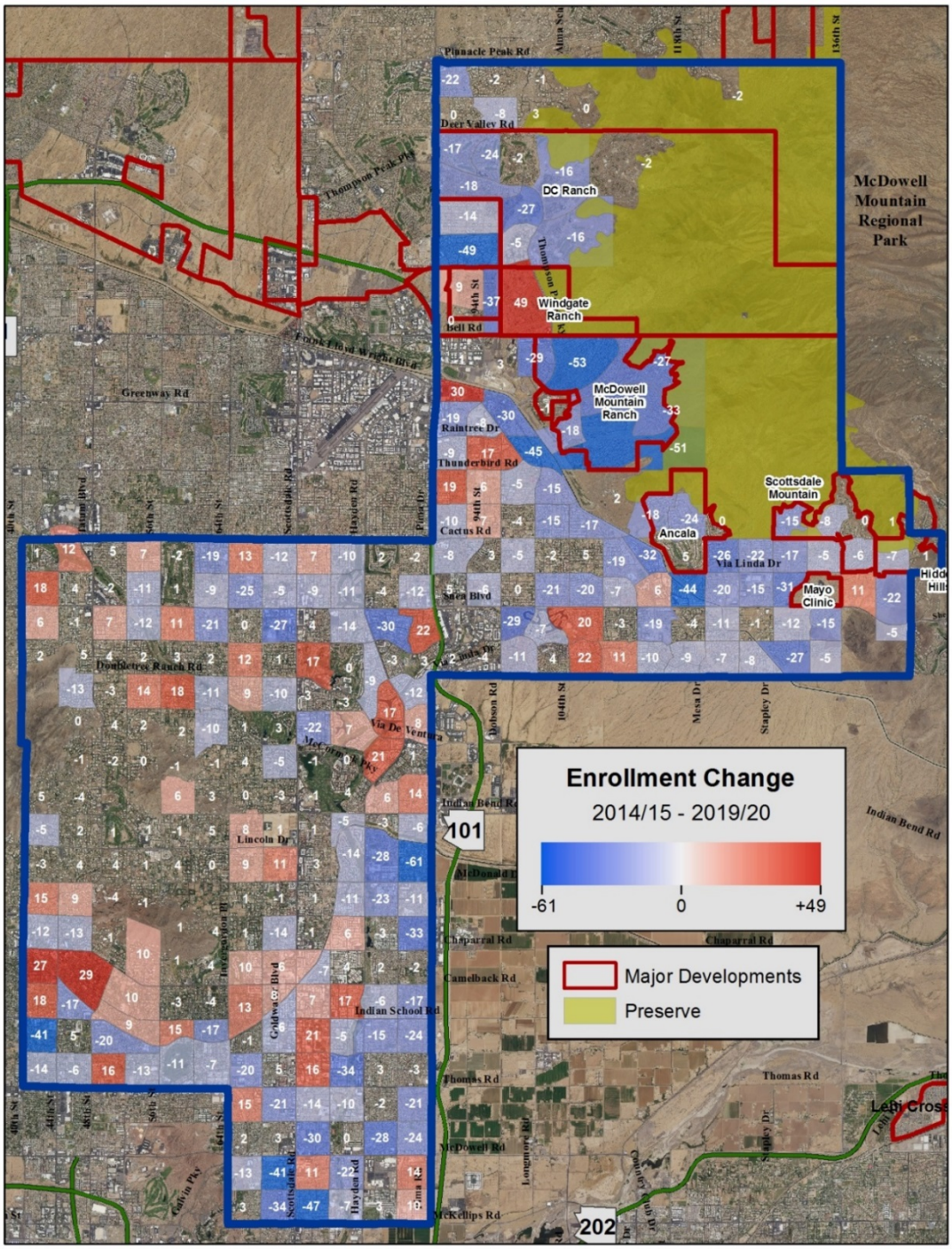
Map 3 depicts the number of current resident students within each planning grid. While the grids vary in size somewhat, the coloring of the grids provides a good depiction of enrollment density. It also illustrates the dispersed areas with high and low enrollment levels, which can present extra challenges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

MAP 3
ENROLLMENT PER GRID: 2020/21



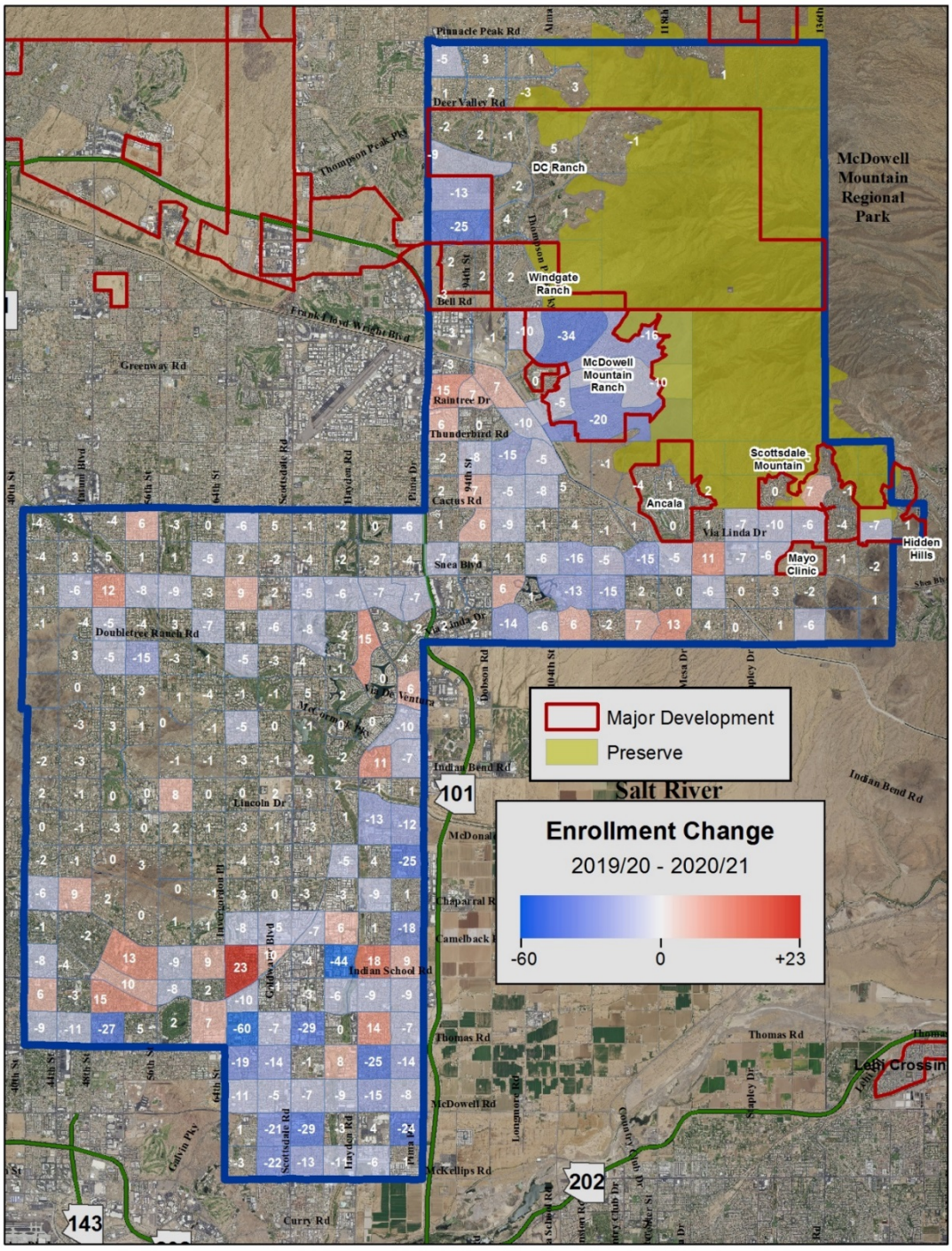
Tracking the location of District students can also be used to analyze changes in the distribution of enrollment over time. **Map 4** shows changes in in-District enrollment between 2014/15 and 2019/20. The map shows widespread losses in enrollment, with the largest declines occurring in the northeastern and far southern portions of the District. Other than a significant increase in the Windgate Ranch area, the other areas of increase were small and scattered.

MAP 4
CHANGE IN ENROLLMENT: 2014/15 - 2019/20



The change in in-District enrollment this year is illustrated in **Map 5,** which shows widespread enrollment losses that are somewhat more severe in the southern portion of the District and in both DC Ranch and McCormick Ranch. Pockets of enrollment gain are fairly widespread, although they are generally limited in size.

MAP 5
CHANGE IN ENROLLMENT: 2019/20 - 2020/21



2.2 Demographic Trends

Table 1 contains Census data on population and housing in the District for 2000 and 2010 and 2020 estimates by Applied Economics; this information can help to explain recent trends and the current character of the area. Unlike many parts of the Valley, the District experienced very little increase in population from 2000 to 2010. There was modest growth in the Desert Mountain Community and significant growth in the Chaparral North Community, but population declined in the remainder of the District. Since 2010, population growth has been slightly faster, increasing by 0.9 percent per year, on average.

TABLE 1
DEMOGRAPHIC TRENDS

	2000 Census	2010 Census	2020 Estimate	Change (2000-2010) Total	Change (2000-2010) Percent	Change (2010-2020) Total	Change (2010-2020) Percent
Population	220,068	220,818	241,078	750	0.0%	20,260	0.9%
Housing Units	110,533	121,622	131,776	11,089	1.0%	10,154	0.8%
Households	98,031	102,742	115,384	4,711	0.5%	12,642	1.2%

Sources: U.S. Bureau of the Census, 2000 and 2010; American Community Survey, 2020; Applied Economics, 2021.
* Compound annual rate of change.

The racial and ethnic composition of the District population has changed little since 2010, with a slight decline in the White share of population and an increase in the Hispanic share of the population, as shown in **Table 2**. This represents a continuation of shifts that occurred between 2000 and 2010.

TABLE 2
DEMOGRAPHIC TRENDS – RACE & ETHNICITY

	2000 Census	2010 Census	2020 Estimate	Change (2000-2010) Total	Change (2000-2010) Percent	Change (2010-2020) Total	Change (2010-2020) Percent
Population	220,068	220,818	241,078	750	0.0%	20,260	0.9%
By Race & Ethnicity:							
White	88.5%	84.1%	82.1%	-9,125	-0.5%	12,247	0.6%
African American	1.2%	1.7%	1.6%	1,234	4.0%	149	0.4%
Native American	0.6%	0.8%	1.3%	357	2.3%	1,396	6.1%
Asian	2.3%	3.4%	3.9%	2,564	4.2%	1,910	2.3%
Hispanic	7.3%	9.9%	10.9%	5,694	3.1%	4,402	1.9%
Other	0.1%	0.1%	0.2%	25	1.0%	156	4.6%

Sources: U.S. Bureau of the Census, 2000 and 2010; American Community Survey, 2020; Applied Economics, 2021.
* Compound annual rate of change.

The data also indicates a general aging of the population since 2010, which directly impacts District enrollment. Despite a regional decline in birth rates that began during the recession and has continued, the population under 5 years of age in the District grew slightly (0.6 percent per year on average) between 2010 and 2020, as shown in **Table 3.** However, at the same time the population aged 5 to 13 years (K-8 students) barely increased (0.1 percent per year on average) and the high school age population (14 to 17 years) declined by 0.3 percent per year over the past 10 years.

At 26 percent, the share of the population in the 25 to 44 age group, typically considered the prime child-bearing years, has increased slightly since 2010, but the cohort remains considerably smaller that it was in 2000 (30.5 percent). Continued growth in the 45 to 64 year old cohort (particularly between 2000 and 2010), has caused this age group's share of the total population to increase from about 26 percent in 2000 to about 29 percent in 2020. However, the rate of growth in the 65 years and older category (1.6 percent per year on average) remains the highest and nearly twice that of the overall population; this group now accounts for more than 20 percent of the total population, up from nearly 17 percent in 2000. Increases in the population aged 45 years and older accounted for nearly 62 percent of the District's total population growth since 2010.

TABLE 3
DEMOGRAPHIC TRENDS – AGE

	2000 Census	2010 Census	2020 Estimate	Change (2000-2010) Total	Change (2000-2010) Percent	Change (2010-2020) Total	Change (2010-2020) Percent
Population	220,068	220,818	241,078	750	0.0%	20,260	0.9%
By Age:							
Under 5	5.0%	4.3%	4.2%	-1,358	-1.3%	588	0.6%
5 to 13	10.5%	9.4%	8.7%	-2,368	-1.1%	267	0.1%
14 to 17	4.6%	4.7%	4.2%	258	0.3%	-266	-0.3%
18 to 24	6.9%	7.4%	7.2%	1,224	0.8%	990	0.6%
25 to 44	30.5%	25.6%	26.0%	-10,663	-1.7%	6,205	1.0%
45 to 64	25.7%	29.7%	29.4%	8,961	1.5%	5,286	0.8%
65 and up	16.8%	18.9%	20.3%	4,695	1.2%	7,190	1.6%

Sources: U.S. Bureau of the Census, 2000 and 2010; American Community Survey, 2020; Applied Economics, 2021.
* Compound annual rate of change.

There were about 11,100 new housing units added between 2000 and 2010, resulting in an annual average growth rate of about 1.0 percent (**Table 4**). Since 2010, nearly 10,200 new units have been added to the inventory, representing an average annual growth rate of 0.8 percent. Single family units comprise about 22 percent of total additions since 2010 (down from about 34 percent between 2000 and 2010), even though roughly 50 percent of the District's inventory continues to be single family. Occupancy levels dropped from 89 percent to 85 percent between 2000 and 2010 as a result of the recession, but they are now up to nearly 88 percent.

TABLE 4
DEMOGRAPHIC TRENDS – HOUSING UNITS

	2000 Census	2010 Census	2020 Estimate	Change (2000-2010) Total	Change (2000-2010) Percent	Change (2010-2020) Total	Change (2010-2020) Percent
Housing Units	110,533	121,622	131,776	11,089	1.0%	10,154	0.8%
Occupied	88.7%	84.5%	87.6%	4,711	0.5%	12,642	1.2%
Owner	60.3%	55.9%	56.2%	1,251	0.2%	6,124	0.9%
Renter	28.4%	28.6%	31.9%	3,460	1.1%	7,192	1.9%
Vacant	11.3%	15.5%	12.4%	6,378	4.2%	-2,488	-1.4%
By Unit Type:							
Single Family	54.1%	52.2%	49.9%	3,748	0.6%	2,248	0.3%
Multifamily	46.0%	47.8%	50.1%	7,322	1.4%	7,924	1.3%

Sources: U.S. Bureau of the Census, 2000 and 2010; American Community Survey, 2020; Applied Economics, 2021.
* Compound annual rate of change.

In terms of housing mix, the share of renter-occupied housing units increased from about 28 percent in 2000 to 32 percent in 2020. 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.

The distribution of households by age (**Table 5**) can be an indicator of future student enrollment; as such, it is important to note that the share of householders aged 35 to 44, which drive older elementary-age enrollment, has declined since 2000 (from 21 percent to 16 percent), although the share has stabilized somewhat since 2010. At the same time, the share of householders aged 45 to 54, which typically drive high school enrollment, has remained nearly unchanged, at about 19 percent, over the 20-year period. Since 2000, however, the share of householders over the age of 54 years has increased from roughly 40 percent to nearly 47 percent in 2020. Household size has declined from 2.24 in 2000 to 2.09 in 2020; 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

	2000 Census	2010 Census	2020 Estimate	Change (2000-2010) Total	Change (2000-2010) Percent	Change (2010-2020) Total	Change (2010-2020) Percent
Households	98,031	102,742	115,384	4,711	0.5%	12,642	1.2%
By Age:							
Under 34	20.4%	18.6%	18.6%	-819	-0.4%	2,309	1.1%
35 to 44	20.6%	15.8%	15.6%	-4,025	-2.2%	1,829	1.1%
45 to 54	19.4%	20.0%	19.0%	1,542	0.8%	1,365	0.6%
55 to 64	15.1%	18.3%	18.5%	4,077	2.5%	2,478	1.2%
65 and up	24.5%	27.2%	28.3%	3,936	1.5%	4,661	1.6%
Population Per	2.24	2.15	2.09	-0.10	-0.4%	-0.06	-0.3%

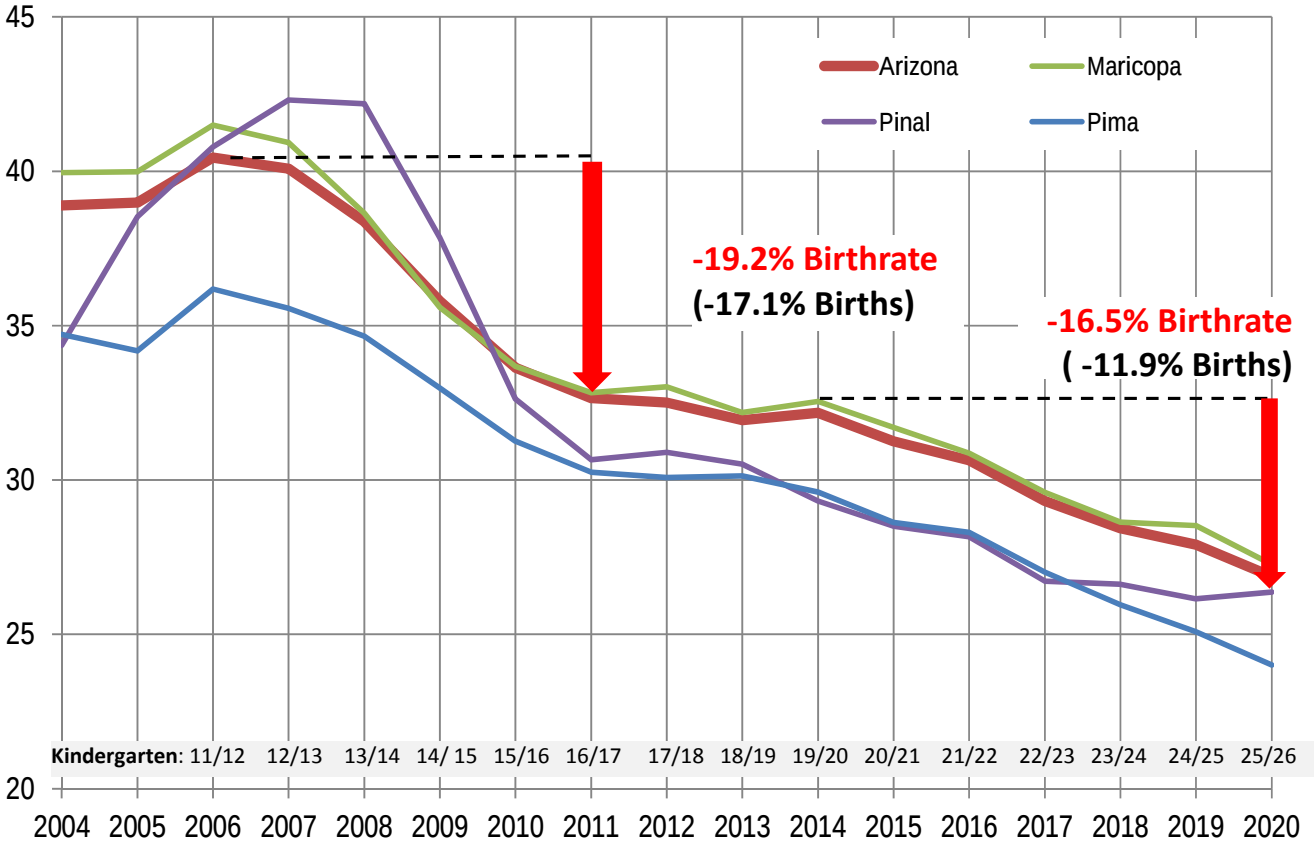
Sources: U.S. Bureau of the Census, 2000 and 2010; American Community Survey, 2020; Applied Economics, 2021.
* Compound annual rate of change.

Another major factor affecting enrollment in schools is the recent decline in the birth rate, both regionally and nationally. As shown in **Figure 5**, the birthrate (births per 1,000 for the population aged 15 to 45) in Arizona declined by 19.2 percent between 2006 and 2011 due to the recession. Between 2011 and 2014 the rate was fairly stable, but since then the rate has been declining again falling by another 16.5 percent in six years, which brings the total compound rate reduction to 33 percent since 2006.

Despite the continued decline in the birth rate, the total number of births has declined less since 2014 because the population aged 15 to 45 has been increasing. 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 latest drops in the birthrate will likely have a significant impact on the size of incoming kindergarten classes through at least 2025/26, declining by as much as 11.85 percent statewide. Between this factor and the push by charter schools to attract Kindergarteners,

nearly all school Districts in the Phoenix Metropolitan Area have experienced recent declines in Kindergarten enrollment and they will likely continue to see reduced class sizes for several more years.

FIGURE 5
BIRTHRATES IN ARIZONA AND SELECTED COUNTIES: 2004 – 2020



Sources: Arizona Department of Health Services; Applied Economics, 2020.

2.3 Alternative Providers

There are currently 21 charter schools operating within the District's boundaries, serving 7,800 K-12 students, as listed on **Table 6**. Since 2014/15, charter enrollment has increased by nearly 3,700 K-12 students (**Table 7**). While not all of these charter school students reside in the District, there has been an enormous increase in the proliferation of charter schools in the area. Interestingly, however, charter enrollment increases since 2018/19 have been limited to about 100 students per year.

TABLE 6
ENROLLMENT IN LOCAL CHARTER SCHOOLS

School Name	Address	City	Zip	Total K-12*
Accelerated Learning Center	4105 E. Shea Boulevard	Phoenix	85028	162
BASIS Scottsdale	10400 N.128th Street	Scottsdale	85259	1,132
BASIS Scottsdale Primary - East Campus	11440 N. 136th Street	Scottsdale	85259	614
Great Hearts Academies - Archway Cicero	7205 N. Pima Road	Scottsdale	85258	536
Great Hearts Academies - Archway Scottsdale	16648 N 94th St	Scottsdale	85255	1,082
Great Hearts Academies - Archway Veritas	3102 N. 56th Street	Phoenix	85018	722
Great Hearts Academies - Cicero Prep	7205 N. Pima Road	Scottsdale	85258	487
Great Hearts Academies - Scottsdale Prep	16537/16576 N. 92nd Street	Scottsdale	85260	857
Great Hearts Academies - Veritas Prep	3102 N. 56th Street	Phoenix	85018	797
Hirsch Academy: A Challenge Foundation Academy	6535 E. Osborn Road	Scottsdale	85251	178
Integrity Education Centre	515 E. Continental Drive	Tempe	85281	26
Mission Montessori Academy at St. Anthony	12990 E. Shea Boulevard	Scottsdale	85259	13
Mission Montessori Academy at St. Apkar	8849 E. Cholla Street	Scottsdale	85260	13
Mission Montessori Academy at St. George	4530 E. Gold Dust Avenue	Phoenix	85028	49
Mission Montessori Academy del Jardin	11050 N. 96th Street	Scottsdale	85260	85
Mission Montessori Academy del Norte	9575 E. Larkspur St.	Scottsdale	85260	44
Montessori Academy	6050 N. Invergordon Road	Paradise Valley	85253	150
Noah Webster Schools - Pima	5399 N. Pima Road	Scottsdale	85250	405
Ombudsman - Charter East	3943 E. Thomas Road	Phoenix	85018	115
Ombudsman - Charter East II	4041 E. Thomas Road	Phoenix	85018	186
Scottsdale Country Day School	10460 N. 56th Street	Scottsdale	85253	150
Total Charter				7,803

Source: Arizona Department of Education; Applied Economics 2021.
* Estimated based on 40th-day 2020-21 ADM data.

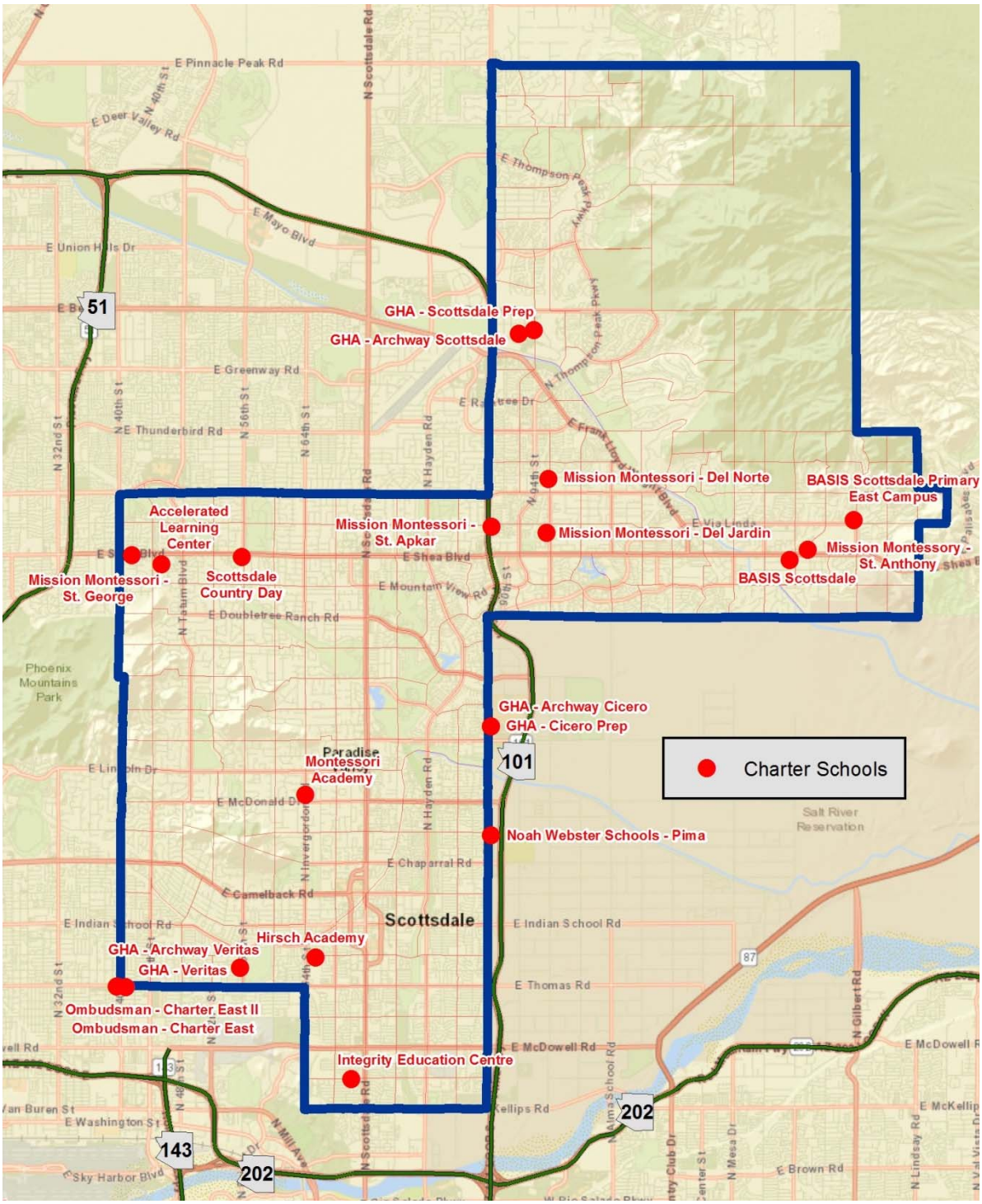
TABLE 7
ENROLLMENT IN LOCAL CHARTER SCHOOLS BY GRADE

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	21	500	548	541	528	494	619	630	569	501	373	362	374	462	6,501	249
2018-19	22	694	689	712	714	701	678	671	613	554	387	375	395	525	7,708	1,207
2019-20	21	676	687	674	690	655	761	696	629	588	408	409	405	517	7,795	87
2020-21*	21	648	692	667	668	664	759	745	626	613	378	395	397	551	7,803	95

Source: Arizona Department of Education; Applied Economics 2021.
* Estimated based on 40th-day ADM data.

Charter schools can be found throughout the District but are often located in close proximity to major transportation corridors and in established areas with higher population densities, shown in **Map 6**. 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 6
AREA CHARTER SCHOOLS



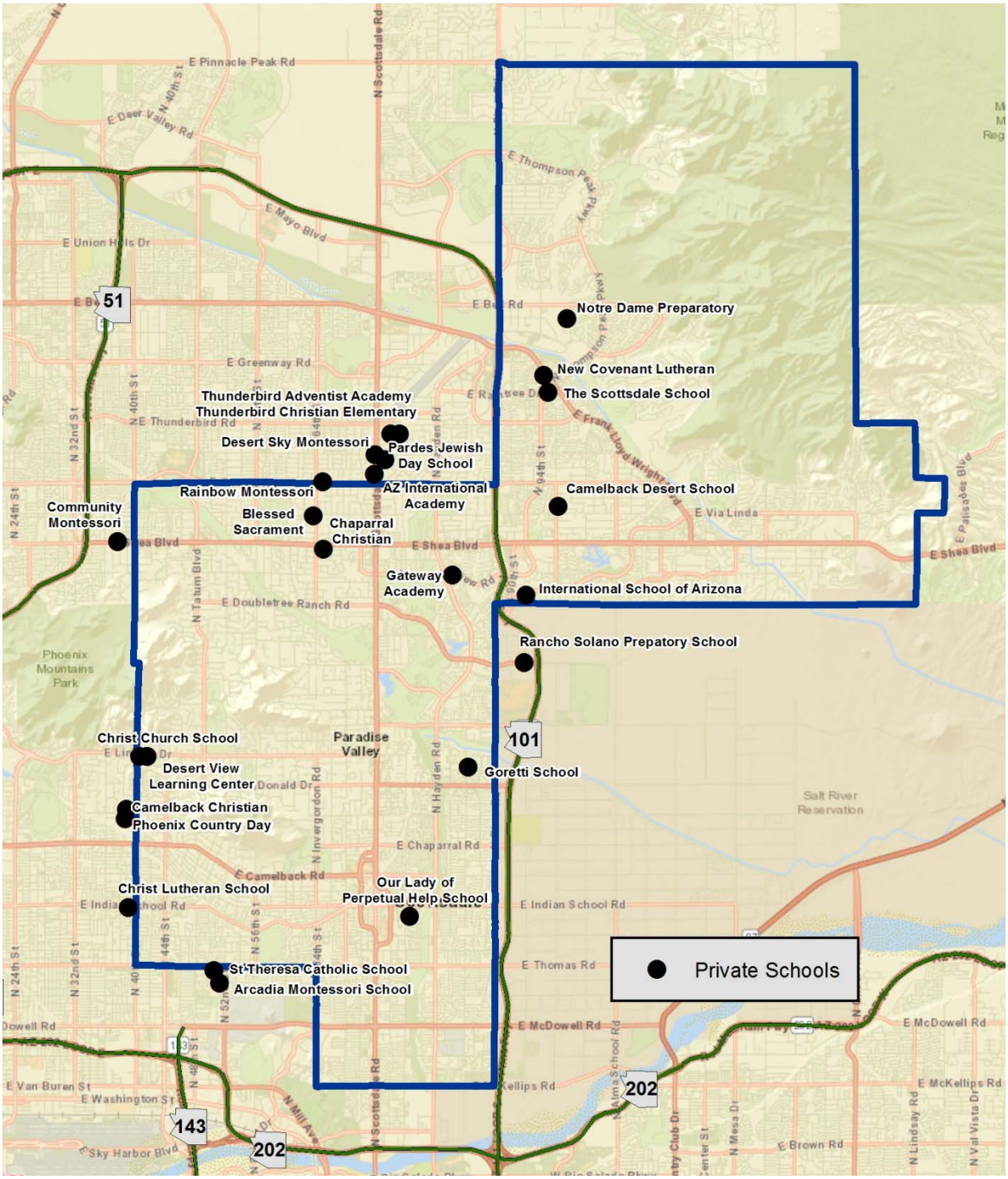
Private schools do not have the same reporting requirements as charter entities so enrollment data is often less accessible, although the schools tend to have more stable enrollment than charter schools. In 2020 there were 27 private schools (up from 16 schools seven years ago) operating in locations throughout the District with enrollment totaling roughly 4,400 K-12 students (**Table 8 and Map 7)**.

TABLE 8
ENROLLMENT IN LOCAL PRIVATE SCHOOLS

School Name	Address	City	Zip	Total K-12*
Arcadia Montessori School	5115 E. Virginia Avenue	Phoenix	85008	14
Arizona International Academy	12430 N. Scottsdale Road	Scottsdale	85254	14
Blessed Sacrament Preschool & Kindergarten	11300 N. 64th Street	Scottsdale	85254	22
Camelback Christian School	3900 E. Stanford Drive	Paradise Valley	85253	11
Camelback Desert School	9606 E. Kalil Drive	Scottsdale	85260	14
Chaparral Christian Preschool & Kindergarten	6451 E. Shea Boulevard	Scottsdale	85254	19
Christ Church School	4015 E. Lincoln Drive	Paradise Valley	85253	33
Christ Lutheran School	3901 E. Indian School Road	Phoenix	85018	449
Community Montessori School	3737 E. Shea Boulevard	Phoenix	85028	6
Desert Sky Montessori	12850 N. Scottsdale Road	Scottsdale	85254	8
Desert View Learning Center	4027 E. Lincoln Drive	Paradise Valley	85253	102
Gateway Academy	3939 E. Shea Bloulevard	Phoenix	85028	94
International School of Arizona	9522 E. San Salvador Drive	Scottsdale	85258	203
New Covenant Lutheran Church Children's Ministry	15152 N. Frank Lloyd Wright Boulevard	Scottsdale	85260	21
Notre Dame Preparatory	9701 E. Bell Road	Scottsdale	85260	925
Our Lady of Perpetual Help School	3801 N. Miller Road	Scottsdale	85251	394
Pardes Jewish Day School	12753 N. Scottsdale Road	Scottsdale	85254	283
Phoenix Country Day School	3901 E. Stanford Drive	Paradise Valley	85253	717
Rainbow Montessori School - Cactus	6520 E. Cactus Road	Scottsdale	85254	5
Rainbow Montessori School - Voltaire	6402 E. Voltaire Avenue	Scottsdale	85254	4
Rancho Solano Preparatory School	9180 E. Via De Ventura	Scottsdale	85258	249
St. Maria Goretti Preschool and Kindergarten	6261 N. Granite Reef Road	Scottsdale	85250	21
St. Theresa Catholic School	5001 E. Thomas Road	Phoenix	85018	368
The Scottsdale School	14684 N. Frank Lloyd Wright Boulevard	Scottsdale	85260	34
Thunderbird Adventist Academy	7410 E. Sutton Drive	Scottsdale	85260	132
Thunderbird Christian Elementary School	7440 E. Sutton Drive	Scottsdale	85260	104
Ville de Marie Academy	8524 E. Thomas Road	Scottsdale	85251	199
Total Private				4,445

Source: NCES Private School Universe Survey, 2017-18 school year data; PrivateSchoolReview.com, 2021.
Applied Economics, 2021.

MAP 7
LOCAL PRIVATE SCHOOLS



3.0 Residential Development

3.1 Market Conditions

The foremost market issue in 2021 is the Covid-19 virus. While a viral outbreak similar to the H1N1, SARS, MERS, or Ebola illnesses of the last few years had been anticipated, the precise timing and severity was not, and the response has been unprecedented. Job losses in the spring due to the disease were massive but they were counteracted somewhat by financial transfers from the federal government. After the initial economic shock subsided predictions have varied on some points but, in general, a consensus has emerged that anticipates a partial recovery that continues throughout 2021. Unemployment levels are expected to remain above average during 2021 but, as a matter of perspective, the February 2020 rate of 3.5 percent was a 50-year low.

While the entire country has been impacted by this recession, some areas, such as Arizona and particularly metropolitan Phoenix, are better situated to recover more quickly and perhaps stronger than others. The 2007 recession was driven significantly by real estate speculation and a severely over-built housing market. Since the last recession there has been an emphasis in Arizona on establishing a more diversified economic base, including advanced manufacturing, bioscience, and financial and professional services. Companies are often attracted by a university system that is graduating large numbers of engineering, science, and mathematics students. Not only do these companies create a large number of jobs, but new tech and manufacturing companies tend to pay better than average wages and new suppliers create additional employment. These types of jobs are also more insulated from economic downturns than many others, allowing for additional stability. While growth in the 2000's fell from the elevated levels of the 1990's and dropped sharply during the 2007-09 recession, overall population growth in the state has been solid (**Table 9**). The population in Arizona, especially in the metro areas, is expected to continue to grow, largely in response to the stronger, more solid economic footing that now exists.

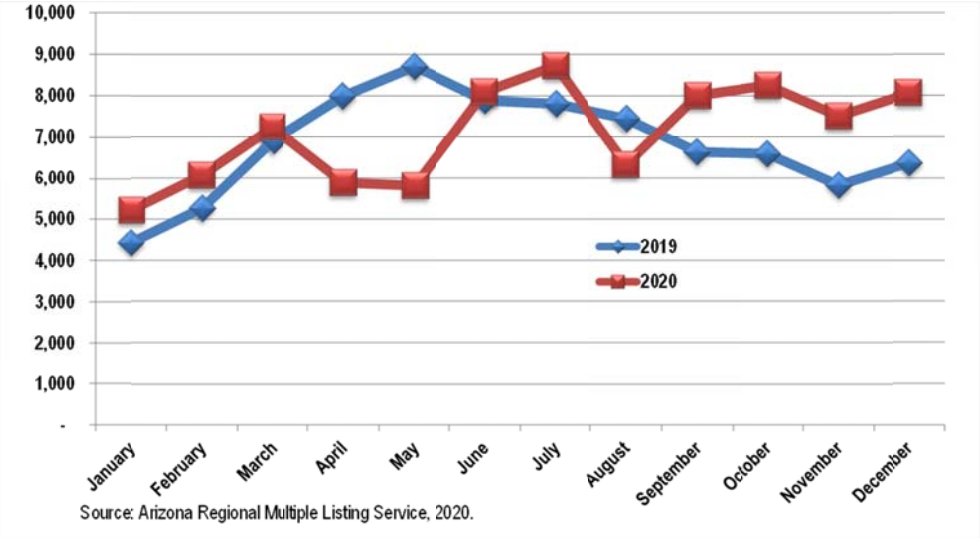
TABLE 9
POPULATION GROWTH IN THE SUN CORRIDOR

Population	2000	2005	2010	2015	2019	2000-2019
Maricopa County	3,092,927	3,577,074	3,824,058	4,076,438	4,367,835	1,274,908
Pima County	848,375	940,004	981,168	1,009,371	1,044,675	196,300
Pinal County	182,435	250,195	376,369	406,468	455,210	272,775
Yavapai County	169,520	196,629	210,899	217,778	232,386	62,866
Arizona	5,175,581	5,924,476	6,401,568	6,758,251	7,189,020	2,013,439
Change	**1995-2000**	**2000-2005**	**2005-2010**	**2010-2015**	**2015-2019**	**2000-2019**
Maricopa County	24%	16%	7%	7%	7.1%	41%
Pima County	13%	11%	4%	3%	3.5%	23%
Pinal County	27%	37%	50%	8%	12.0%	150%
Yavapai County	27%	16%	7%	3%	6.7%	37%
Arizona	21%	14%	8%	6%	6.4%	39%

Source: Arizona Commerce Authority; Applied Economics 2020.

In the current environment the Phoenix housing market is significantly under-supplied, removing that negative factor that played such a large role in the last recession. According to data from the Arizona Regional Multiple List Service (ARMLS) there was only a 2.5 month supply of single family houses in January, rather than the 5 to 6 month supply generally desired for a balanced market. The supply level in the metro area has fallen since then, to less than a months' supply in December (just 7,457 active listings). Housing sales have been very strong following the abrupt reduction in activity in the spring when the pandemic first jolted the economy (**Figure 6**); a drop in sales during August was quickly reversed in September and has remained strong.

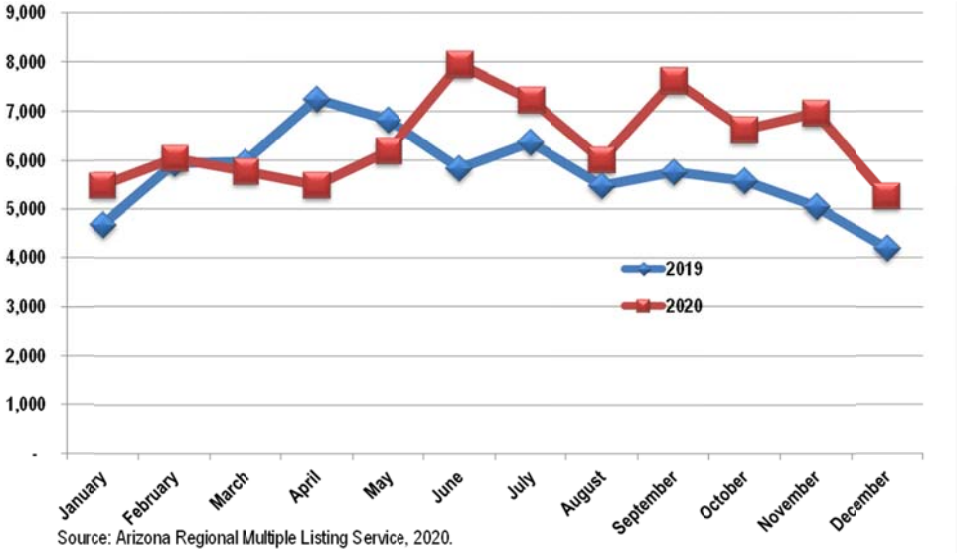
FIGURE 6
SALES OF SINGLE FAMILY HOMES



Source: Arizona Regional Multiple Listing Service, 2020.

Pending sales can serve as a leading indicator of market strength (**Figure 7**). Even though traditional home sale processes were upended by the Coronavirus, builders were very quick to adapt with new techniques. Activity fell during the mid-summer months but increased sharply in September.

FIGURE 7
PENDING SALES OF SINGLE FAMILY HOMES



Source: Arizona Regional Multiple Listing Service, 2020.

Although some slowing in the final months of the year had been expected, activity remains stronger than in 2019. The regional housing market should continue to be robust in 2021 since mortgage rates are at the lowest levels ever, housing supply is low, and the population in Arizona continues to grow.

There has also been a shift in how people view and use their houses due to the pandemic. For some a house is viewed as a safe haven in ways an apartment unit is not. Remote working has underscored the need for office space in the residence. Builders have responded with new standards and options addressing space and health issues. These factors, along with the low mortgage rates, have encouraged people who were planning to purchase within a few years to advance their timetable.

Changes in the housing industry will influence the local real estate market. Increased single family demand is already in evidence, and as increased construction drives up labor costs there will be new pressure on the multifamily market, which has experienced a softening of demand. Multifamily projects with financing in place will probably be completed, but new additions are anticipated to slow.

Along with increased single family demand, there will likely be a desire for larger houses and lots as homes become more central to family life, and even employment or educational needs. This will tend to move growth toward the outer parts of the metro area where land costs are lower. The focus on entry-level and first move-up housing will favor the west Valley, where land sales have already been very active.

The southeast Valley has been a major focus of growth for a long time and the area is rapidly being built out, but the future may bring a new chapter. In 2019, 4,140 acres of State Trust Land was annexed by Queen Creek. An auction in November 2020 for 2,783 acres on the south side of Apache Junction is targeted for a master planned community. The purchase price was over three times higher than the appraised value and D.R. Horton was the successful bidder. Transportation access is a vital aspect for major development and State Route 24, which connects to Loop 202, will be extended to Ironwood Road in Pinal County, with construction starting near the end of 2020. Opening this land could have a massive impact on the east Valley and San Tan Valley to the south.

In northern Phoenix, new infrastructure is being installed in the I-17 corridor, which will enable new development of State Trust Land. The Phoenix City Council has approved a rezoning northwest of the Loop 303 and I-17, with a State land auction of 1,128 acres to Taiwan Semiconductor Manufacturing Co. in December; much, but not all, of this land is intended for employment uses and manufacturing is scheduled to start by 2024. New housing in this area will likely be higher density and include little, if any, entry-level housing.

In central Pinal County, thousands of new manufacturing jobs are to be gained in the next few years. This will increase housing demand throughout the area. At this time most new housing is entry-level, but increased employment opens the possibility for an expanded housing market.

The retail industry has been under pressure for years and the pandemic has caused even more problems. It should be expected that more retail land, both zoned and existing, will be converted to residential uses. Among those uses will likely be single family rental communities, which have become a rapidly expanding market

segment; the separate units with no stairs or elevators are even more attractive under current circumstances for individuals that are not interested in purchasing single family houses.

While a variety of negative factors could emerge to slow the housing market, the near-term forecast is for continued strength. Future years will likely see some shifting in the market as different segments and locations react to evolving consumer dynamics, but the more solid underlying economic conditions in metro Phoenix should result in a more consistently resolute housing market.

3.2 Housing Construction

New housing development in the District has been dominated by multifamily projects over the past ten years and apartment construction has accounted for about 70 percent of total growth. About 15 percent of the remaining new housing has been low-density, single family, with other single family (townhouse or condominiums) filling out the rest. The growth by housing type over the past decade is shown on **Table 10**. The building permit categories shown are intended to reflect correlations between the new housing units and the age structure of the households that will likely occupy them. Group quarter facilities, such as nursing homes or dormitories, are not included as either retirement or multifamily housing.

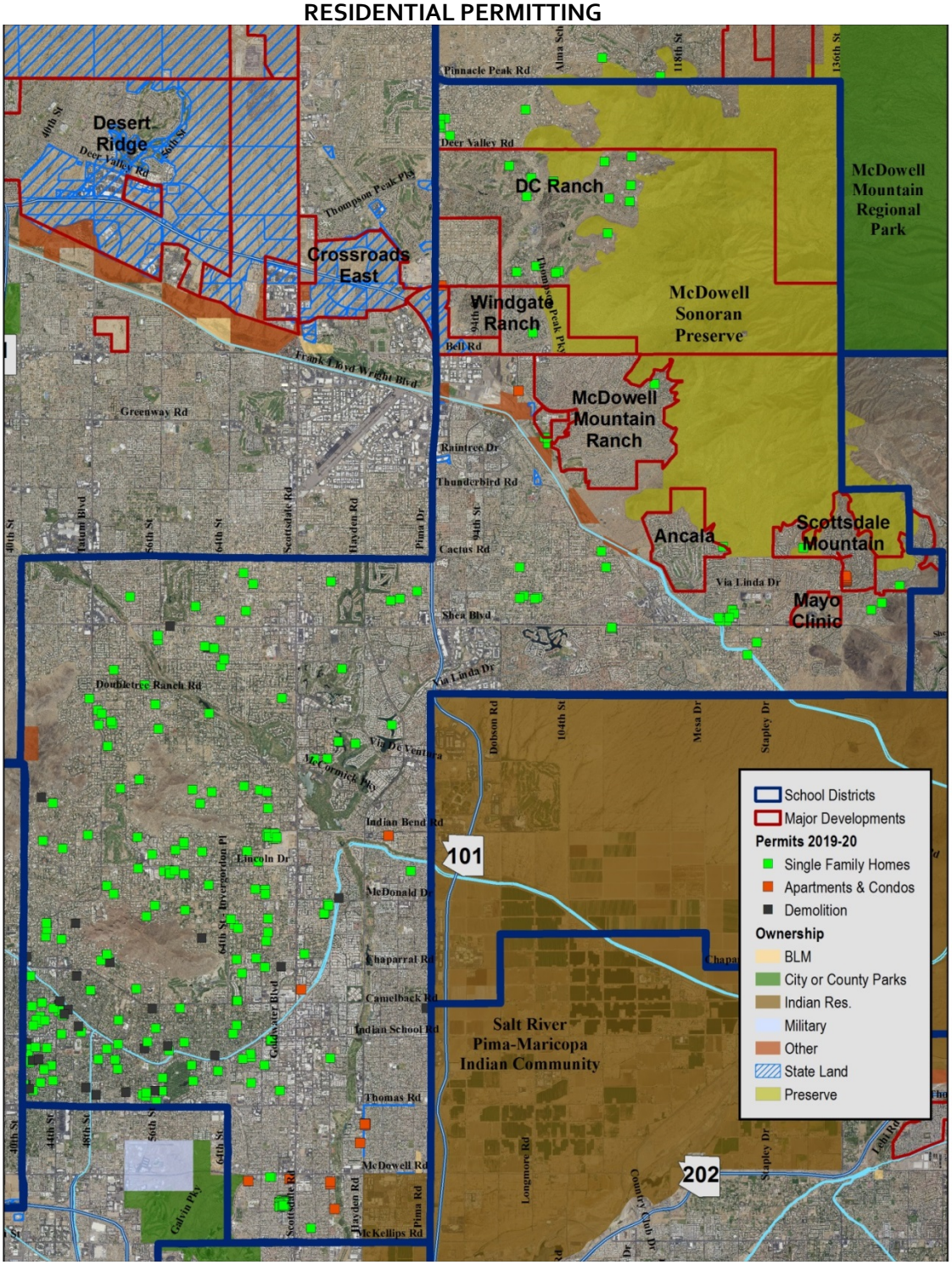
TABLE 10
HOUSING PERMITS

Housing Type	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	Total
Family Housing											
Single Family 2 du/ac or less	81	135	191	163	190	201	75	168	231	139	1,574
Single Family 2.01 - 3.5 du/ac	-	-	-	-	7	12	23	11	10	22	85
Single Family 3.51 - 4.5 du/ac	17	18	29	26	16	75	21	86	69	57	414
Single Family 4.51 - 6 du/ac	-	-	-	-	-	-	-	-	-	-	-
Single Family 6.01du/ac & Over	-	-	-	-	-	-	5	50	40	61	156
Single Family Attached	-	-	-	12	8	-	-	-	-	-	20
Total Single Family	98	153	220	201	221	288	124	315	350	279	2,249
Condominium/Townhouse	43	-	15	46	199	32	51	74	172	65	697
Standard Courtyard Apts	-	-	-	369	612	26	(10)	574	-	120	1,691
Urban/Lifestyle Apts	82	274	523	1,525	418	347	17	82	277	645	4,190
High-rise, Intensive Apts	-	203	-	402	-	-	-	356	185	146	1,292
Total Multifamily	125	477	538	2,342	1,229	405	58	1,086	634	976	7,870
Total Non-Age-Restricted	223	630	758	2,543	1,450	693	182	1,401	984	1,255	10,119
Age-Restricted Housing											
Standard Courtyard Apts	-	-	-	-	-	-	-	-	-	334	334
Total Age-restricted	-	-	-	-	-	-	-	-	-	334	334
Total	223	630	758	2,543	1,450	693	182	1,401	984	1,589	10,453

Sources: Maricopa Association of Governments; Construction Monitor; Maricopa County Assessor; Applied Economics, 2021.

Map 8 shows development activity in the District in 2019/20, with green markers indicating individual building permits. About 75 percent of the total activity is located in the downtown and southern regions (the Saguaro and Coronado communities) due to the large number of multifamily units present; these areas, and the Arcadia community, have had the largest amount of single family construction. The permit levels for each community in 2019/20 are generally similar to those for the past decade, although some shifts in the Coronado and Saguaro communities have occurred due to the amount of multifamily development in those areas.

MAP 8
RESIDENTIAL PERMITTING



3.3 Residential Development

3.3.1 Future Development Potential

Potential housing additions in the District are estimated at about 19,000 units, as detailed on **Table 11** by type of housing and according to the general time period during which construction may begin. The timing categories in this table only indicate a beginning, since projects generally develop over a number of years. The Infill category includes rural parcels, single lots within existing neighborhoods, and small custom projects likely to be under development intermittently over a number of years; this category also includes an estimate of potential redevelopment units, although that class of supply can change significantly at any time and for various reasons. Both unit potential and timing estimates on this table will change as new information becomes available.

The District's potential new supply is expected to be similar to the additions to inventory in recent years, with multifamily accounting for about 75 percent of the total and single family additions expected to be primarily low-density properties. Most of the multifamily developments are expected to be high-amenity projects, some of which will be higher elevation complexes, especially in the downtown area. In some cases the redevelopment properties will take the place of older residential units. This could mean clearing two single family lots to create three new ones, or one old apartment complex being replaced by a high-density one. In such cases the net additions would be lower, and in some cases the replacement projects could be less family-oriented.

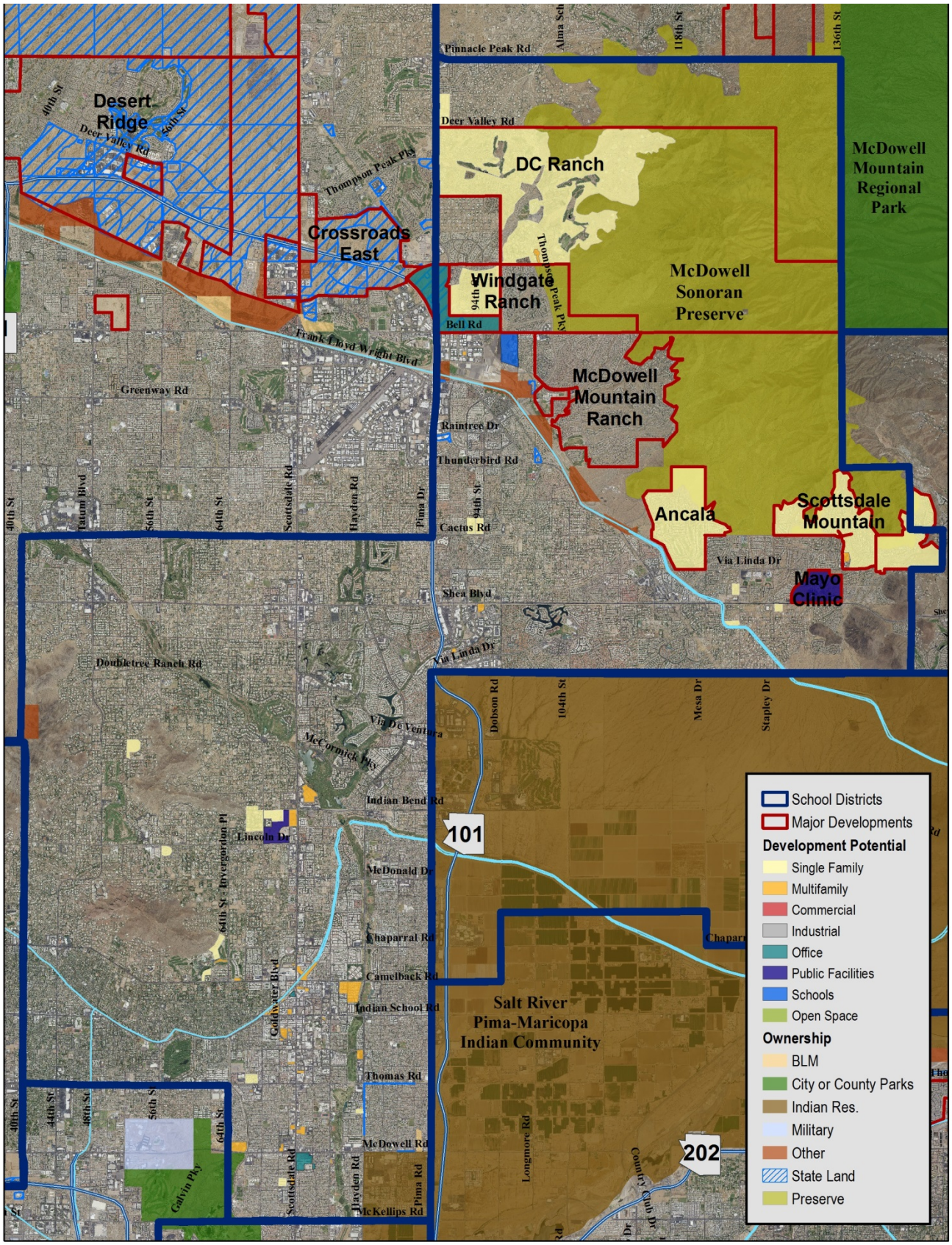
TABLE 11
POTENTIAL NEW HOUSING BY DEVELOPMENT TIMELINE

	Existing		Vacant Land					
Housing Type	Infill	Projects	1 Year	2-3 Years	3-5 Years	5-10 Years	10+ Years	Total
Single Family 2 du/ac or less	2,300	126	-	43	-	-	-	2,469
Single Family 2.01 - 3.5 du/ac	-	53	40	96	-	-	-	189
Single Family 3.51 - 4.5 du/ac	1,233	-	34	-	-	-	-	1,267
Single Family 4.51 - 6 du/ac	-	-	-	-	27	-	-	27
Single Family 6.01du/ac & Over	499	6	-	-	-	90	-	595
Total Single Family	4,032	185	74	139	27	90	-	4,547
Condominium/Townhouse	659	121	-	86	202	-	-	1,068
Standard Courtyard Apts	1,445	-	20	-	-	-	-	1,465
Urban/Lifestyle Apts	3,999	-	1,283	902	932	2,287	-	9,403
High-rise, Intensive Apts	-	-	100	230	1,457	199	570	2,556
Total Multifamily	6,103	121	1,403	1,218	2,591	2,486	570	14,492
Total	10,135	306	1,477	1,357	2,618	2,576	570	19,039

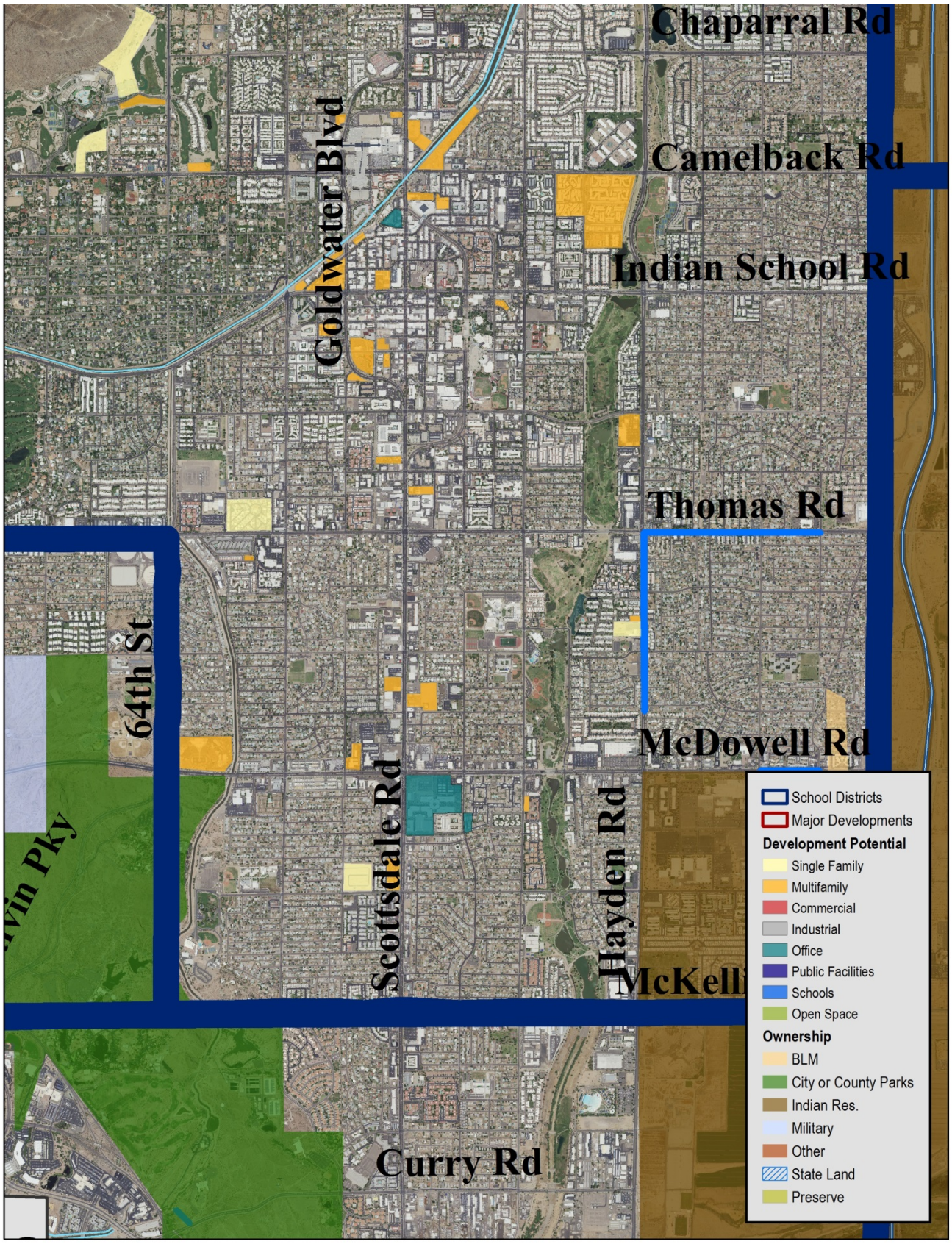
Sources: City of Scottsdale; Applied Economics, 2021.

Future land use and development timing by area is depicted in the following **Maps 9** and **10.** The maps cover the entire district, including the downtown area.

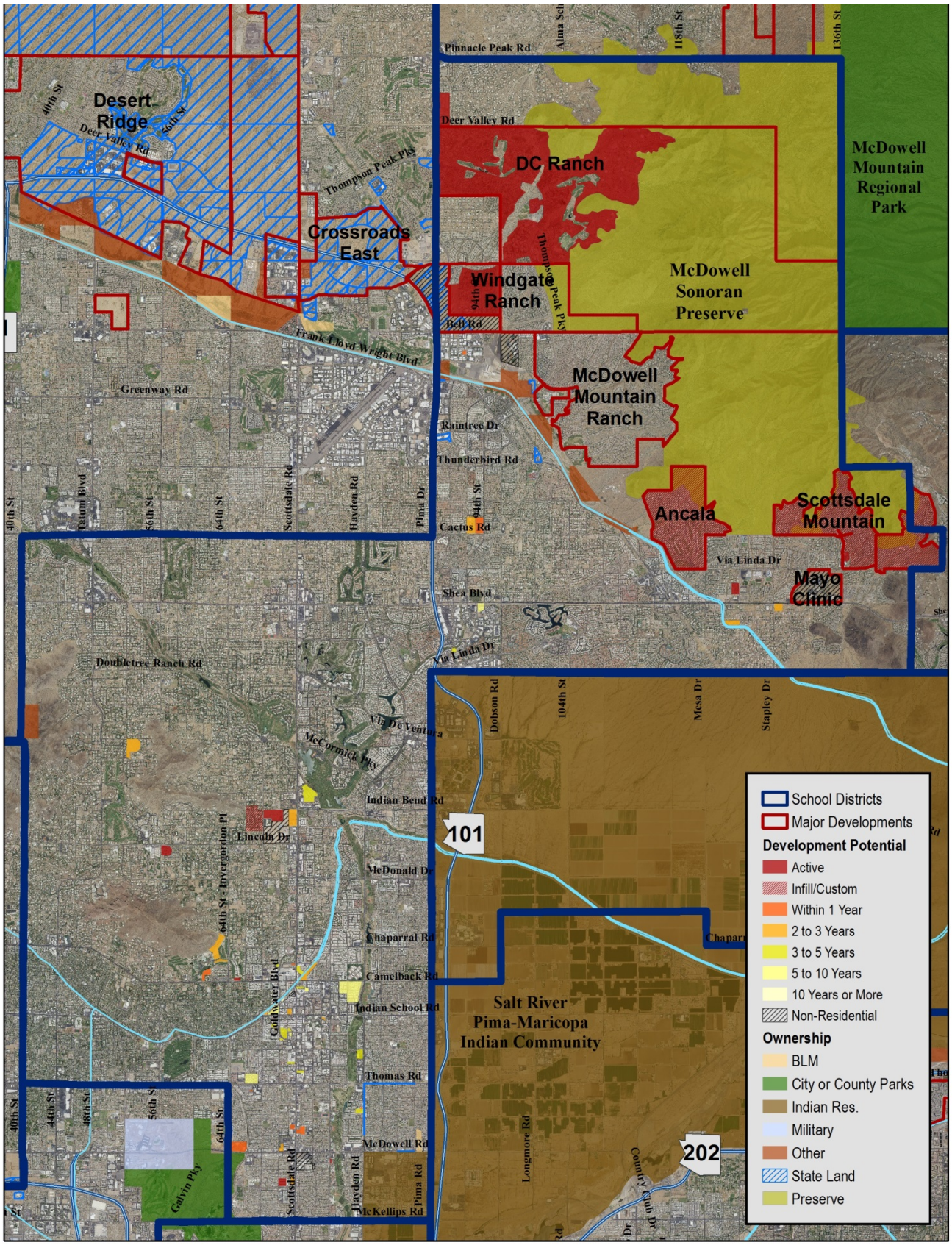
MAP 9A
FUTURE LAND USE



MAP 9B
FUTURE LAND USE – DOWNTOWN AREA

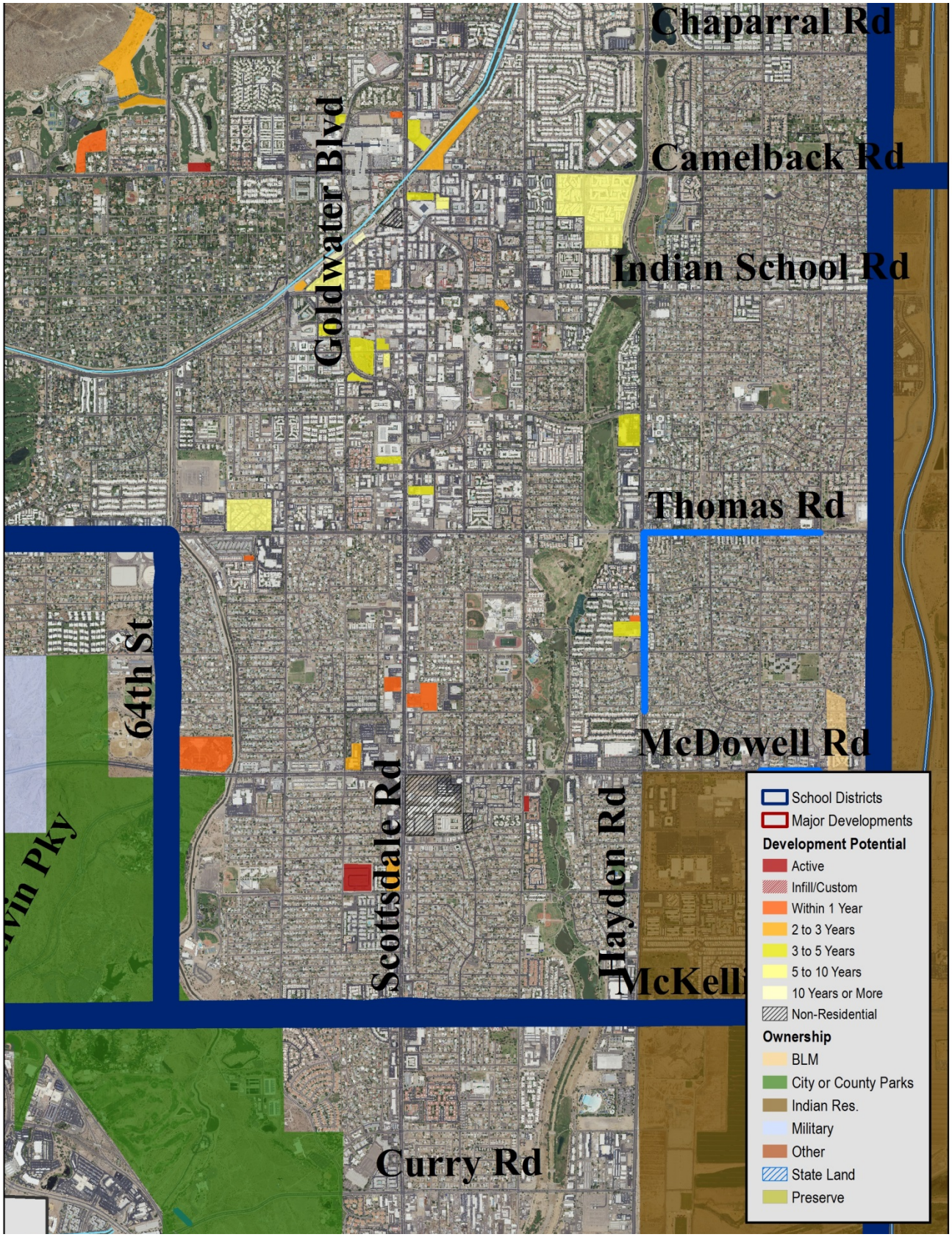


MAP 10A
DEVELOPMENT TIMING



MAP 10B

DEVELOPMENT TIMING – DOWNTOWN AREA



The presence of a variety of housing options lends stability to the market. When a single segment dominates the market, the potential exists for severe disruptions if that particular segment fails. New single family housing in the District is largely in the move-up or executive market; the subdivisions shown on **Table 12** are examples of this, although most of the new single family housing in the District is custom construction. Lower-cost properties exist in the resale market but options are limited in the new housing sector. **Table 12A** offers a view of multifamily properties in the southern portion of the District, where most new multifamily is expected to be built. While this is not a comprehensive list, it can be seen that many complexes offer no more than two bedroom units and rents tend to be high, averaging over $3,500 per month for this list. This type of a limited market tends to restrict the typical age structure of the resident households. It should be noted that some of the older complexes on this list are targets for redevelopment, which could lead to higher average rental rates.

TABLE 12
HOUSING CHARACTERISTICS AT SELECTED DISTRICT SUBDIVISIONS

Builder	Subdivision	Models offered	Sq. Ft. Min	Beds Min	Price Min	Sq. Ft. Max	Beds Max	Price Max	Price/SqFt Min-Max	
Camelot Homes	White Horse	5	4,190	4	$2,002,900	5,932	4	$2,311,900	$478	$390
Shea Homes	Azure by Shea Signature	10	2,986	3	$2,249,990	5,242	4	$2,999,990	$754	$572
	Signature at the Phoenician	7	2,263	2	$1,609,000	3,980	3	$1,955,000	$711	$491

TABLE 12A
HOUSING CHARACTERISTICS AT SELECTED APARTMENT COMPLEXES

Complex	Address	Beds Min	Rent Min	Beds Max	Rent Max	Units	Year Built
Broadstone Waterfront	7025 E Via Soleri Dr	Studio	$1,548	2	$3,810	259	2015
Cabana Hayden	2240 N Hayden Rd	Studio	$1,099	2	$1,499	89	2021
Luxe Scottsdale	8444 E Indian School Rd	1	$1,480	3	$3,095	218	2015
Moderne	4848 N Goldwater Blvd	1	$1,655	2	$2,835	369	2014
Optima Sonoran Village	6895 E Camelback Rd	Studio	$1,528	3	$5,566	812	2013
San Marin at the Civic Center	4215 N Drinkwater Blvd	1	$1,379	3	$2,185	276	1992
SkySong Apartments	1301 N Scottsdale Rd	Studio	$1,253	3	$4,803	325	2014
The Cortesian Apartments	7749 E Camelback Rd	1	$ 959	2	$1,515	332	2005*
The Glen at Old Town	7979 E Camelback Rd	Studio	$1,007	2	$1,590	278	1973
The Griffin Apartments	3234 N Scottsdale Rd	1	$1,568	2	$5,502	277	2018
The Standard	6811 E Main St	1	$1,697	3	NA	133	2016
The Sycamore at Scottsdale	6599 E Thomas Rd	1	$1,399	3	$4,240	350	2013*
The Tomscot**	3015 N Scottsdale Rd	1	$1,512	2	$8,263	279	2016
Visconti at Camelback	7979 E Camelback Rd	1	$1,080	2	$1,550	348	2018*

Source: Apartments.com; Applied Economics, February 24, 2021.

*Renovated
**Studio and 3-bedroom not available

3.3.2 Development Projects

Following the 2007 recession, activity in the District's residential market remained sluggish until rebuilding began between 2012 and 2013. During the past eight years, single family housing growth has been steady, averaging about 250 new houses per year, which is considerably less than in the eight years prior to the recession (2000/01 to 2007/08) when production averaged about 480 houses per year. Multifamily growth offers a different story. While an average of 950 units per year have been added over the last eight years, additions during the eight years before the recession averaged about 500 new units per year. This shift in housing type is expected to continue to be reflected in residential growth in the District.

Single family housing is expected to continue to develop in much the same way as it has in recent years. Most new additions will be from custom construction on lots, primarily in the western half of the District. There will continue to be additions at DC Ranch throughout the projection period, but probably not more than 10 to 15 units per year since the development is approaching buildout. Redevelopment parcels, such as the recently completed Taylor Morrison North 70 project, are expected; this development removed a mobile home park at 70th Street and Continental Drive to build the 65-lot subdivision. As is often the case, this type of redevelopment often removes housing to replace it.

In some cases non-residential uses will be replaced by new housing. Often, commercial-retail property will be replaced, but at the Phoenician Resort a portion of the golf course is being converted to residential use. Shea Homes began land preparation in early 2021 and housing starts are anticipated about mid-year on this 34-lot subdivision. Cullum Homes will be the builder of a 51-lot subdivision that is expected to begin within the next two years and a 30-unit condominium project is also planned.

At 94th Street and Cactus Road, Pulte Homes is planning to open Wildhorse Estates in late 2021 (right). This 40-lot subdivision is replacing a working ranch.



While single family development on small parcels of raw land or redevelopment sites is expected to continue, the rate and size of such production is not likely to increase notably over current construction levels. Therefore, most new single family growth is forecast to continue to take place on individual custom lots.

Most residential growth in the District is expected to come from multifamily development that occurs primarily on redeveloped properties. This could include small projects, like the 31-unit Hayden Townhomes development located on the former Harper's Nursery site (Hayden Road south of Thomas) or the nearby Cabana Hayden project with 89 units; both of these projects were built in 2020. Recent larger projects include the redeveloped commercial space that was once Papago Plaza (274 units) or the 700-plus units under construction at the Scottsdale Entrada site at 64th Street.



Other projects in production in early 2020 include two on Scottsdale Road north of McDowell Road. "Alexan Scottsdale" will have 282 apartments and "Formation" will add another 170 units. South of McDowell Road, the former Kia car dealership site (right) is being redeveloped as a 282-unit apartment complex; construction on this project is expected to begin within about a year. A retail center on McDowell Road, west of Scottsdale Road is also expected to be redeveloped into about 270 apartments in the next two to three years.

The downtown Scottsdale area is also expected to experience new multifamily development in coming years, although the parcels and projects will tend to be smaller and generally at higher densities. Within the next two to three years, residential construction is expected to begin on several projects, including: a 100-unit tower near Scottsdale Fashion Square, the 260-unit Waterview apartment complex at the Arizona Canal and Camelback Road, and the Kimsey-Triangle apartments with 230 units at Scottsdale and Indian School Roads.

A major redevelopment project has been rezoned at Camelback and Hayden Roads. "Gentry on the Green" is expected to include over 1,200 new multifamily units, although there is no specific number at this time. The current property at this location is also multifamily, including the "Visconti" and "Glen at Old Town" complexes. This means the net unit additions could be as low as 300, depending on the density of the new construction and the exact number of units removed. Moreover, the rental costs associated with the new units are likely to be quite different from the existing units, which could alter the household demographics in the area. Given the issues and approvals involved, new construction isn't expected until near the middle of the projection period, so more specific information will be available over time.

Redevelopment entails a number of issues that are not encountered when planning involves raw land. For example, timing is impacted by existing leases and public policy can change, especially in areas like downtown Scottsdale. The "Southbridge Two" mixed-use project was approved in 2019 and then repealed in 2020, thereby nullifying a potential citizen referendum. It isn't known what new plans may be introduced or when, but the situation does illustrate the shifting nature of this type of development.

Overall future residential development in the District is expected to remain steady due to the strong regional housing market and the attractiveness of the local area. However, significant increases are unlikely given the impediments that often accompany redevelopment in urban locations. Some decline in growth can be expected in the later years of the projection period as the number of available sites decline and the associated constraints increase.

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 13**, are based on trends in housing construction, occupancy, ownership and economic growth indicators. Currently, the District contains approximately 115,500 households (occupied housing units) resulting in a population per household of 2.088 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 88 percent.

TABLE 13
HISTORIC AND PROJECTED POPULATION AND HOUSING

		Housing	New	Occupancy	Households		
Year	Population	Units	Units	Rate	Total	Change	Pop/HH
2010/11	220,818	121,603	255	84.5%	102,742	-1,210	2.149
2011/12	222,246	121,825	223	85.1%	103,646	904	2.144
2012/13	225,009	122,456	630	86.1%	105,433	1,787	2.134
2013/14	224,185	123,213	758	85.7%	105,636	203	2.122
2014/15	229,764	125,756	2,543	86.6%	108,927	3,291	2.109
2015/16	232,076	127,207	1,450	86.9%	110,584	1,657	2.099
2016/17	235,496	127,621	414	88.0%	112,250	1,666	2.098
2017/18	234,384	127,803	182	87.5%	111,819	-431	2.096
2018/19	237,279	129,203	1,400	87.6%	113,245	1,426	2.095
2019/20	239,027	130,187	984	87.7%	114,217	972	2.093
2020/21	241,078	131,776	1,589	87.6%	115,474	1,257	2.088
2021/22	242,878	133,101	1,324	87.6%	116,657	1,183	2.082
2022/23	244,579	134,329	1,229	87.7%	117,761	1,104	2.077
2023/24	246,356	135,614	1,285	87.7%	118,904	1,144	2.072
2024/25	247,825	136,718	1,104	87.7%	119,892	987	2.067
2025/26	249,271	137,858	1,140	87.7%	120,914	1,023	2.062
2026/27	251,752	139,570	1,713	87.7%	122,438	1,523	2.056
2027/28	253,691	140,924	1,353	87.7%	123,638	1,201	2.052
2028/29	255,764	142,480	1,556	87.7%	125,002	1,363	2.046
2029/30	257,033	143,529	1,049	87.7%	125,941	939	2.041
2030/31	258,431	144,596	1,067	87.8%	126,901	960	2.036
2021/22-2030/31			12,820			11,427	

Source: Applied Economics, 2021.
*Bolding Indicates Actuals

About 12,800 new housing units are projected over the next 10 years, resulting in a population increase of about 17,400 persons in 11,400 new households. The population per household is expected to remain low since a significant share of the total development potential is projected to be in the form of multifamily units. The decline in the school-age population in existing housing combined with declining capture rates will likely offset all of the enrollment growth that would otherwise be associated with the creation of over 11,000 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 on **Table 14**. 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 0.337 in 2000/01, which was already low compared to most metropolitan Phoenix suburbs at the time, to just 0.269 in 2020/21; the District is expected to experience continued declines in student generation rates, dropping to 0.244 by 2030/31. It should be noted, however, that these rates vary significantly within the District.

TABLE 14
SCHOOL-AGE POPULATION AND ENROLLMENT

		School-Age Population *		K-12 Enrollment			Net Enrollment - Population Ratio		In-District Enrollment - Population Ratio
Year	Households	Total	Per Household	Total	Per Household	Net Difference		In-District Enrollment	
2010/11	102,742	30,606	0.298	25,989	0.253	4,617	0.849	22,103	0.722
2011/12	103,646	30,624	0.295	25,691	0.248	4,933	0.839	21,755	0.710
2012/13	105,433	30,820	0.292	25,167	0.239	5,653	0.817	21,176	0.687
2013/14	105,636	30,372	0.288	24,775	0.235	5,597	0.816	20,727	0.682
2014/15	108,927	31,143	0.286	23,604	0.217	7,539	0.758	19,142	0.615
2015/16	110,584	31,248	0.283	23,414	0.212	7,834	0.749	18,920	0.605
2016/17	112,250	31,450	0.280	23,280	0.207	8,170	0.740	18,682	0.594
2017/18	111,819	31,031	0.278	22,853	0.204	8,178	0.736	18,380	0.592
2018/19	113,245	31,109	0.275	22,371	0.198	8,738	0.719	17,975	0.578
2019/20	114,217	31,065	0.272	22,233	0.195	8,832	0.716	17,566	0.565
2020/21	115,474	31,085	0.269	21,437	0.186	9,648	0.690	16,793	0.540
2021/22	116,657	31,148	0.267	21,852	0.187	9,297	0.702	17,231	0.553
2022/23	117,761	31,182	0.265	21,666	0.184	9,516	0.695	17,069	0.547
2023/24	118,904	31,211	0.262	21,404	0.180	9,807	0.686	16,829	0.539
2024/25	119,892	31,199	0.260	21,275	0.177	9,924	0.682	16,724	0.536
2025/26	120,914	31,148	0.258	21,163	0.175	9,984	0.679	16,635	0.534
2026/27	122,438	31,183	0.255	21,027	0.172	10,156	0.674	16,521	0.530
2027/28	123,638	31,169	0.252	20,915	0.169	10,255	0.671	16,431	0.527
2028/29	125,002	31,142	0.249	20,816	0.167	10,326	0.668	16,355	0.525
2029/30	125,941	31,034	0.246	20,585	0.163	10,448	0.663	16,147	0.520
2030/31	126,901	30,913	0.244	20,594	0.162	10,319	0.666	16,178	0.523

Source: Applied Economics, 2021.
* Population age 5 through 17, corresponds with Kindergarten through 12th grade.
Bolding indicates historical data.

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 (hereafter referred to the Net E-P Ratio), 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 In-District E-P Ratio or Capture Rate).

In 1990/91 the District's Net E-P Ratio was 0.879, meaning that nearly 88 percent of the school-age population of the District attended District schools, which was very typical for a mature area that also included a variety of private and parochial schools. Since that time, increasing open enrollment and the proliferation of public charter schools has significantly impacted the E-P ratios for all public school districts in Arizona. By 2000/01, the District's Net E-P Ratio rate fell to 0.823 and dropped further to 0.769 by 2006/07 before rebounding to 0.849 in 2010/11. Since that time the Net E-P Ratio has declined to 0.690 in 2020/21 even as out of district enrollment has increased due to the continued expansion of charter schools in or near District boundaries.

This year the District enrolled 4,644 students from outside the District's boundaries, meaning that only 16,793 of the District's 31,085 school-age children attend District schools. This would imply an in-District E-P Ratio of just 54 percent. With out-of-District students included, the Net E-P Ratio rises to 69 percent with a net loss of 9,648 students. 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 E-P Ratio, in-District K-12 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 840 students (3.9 percent) over the next ten years, dropping to 20,594 by 2030/31. **Table 15** provides more detail on District enrollment history and projections by grade level.

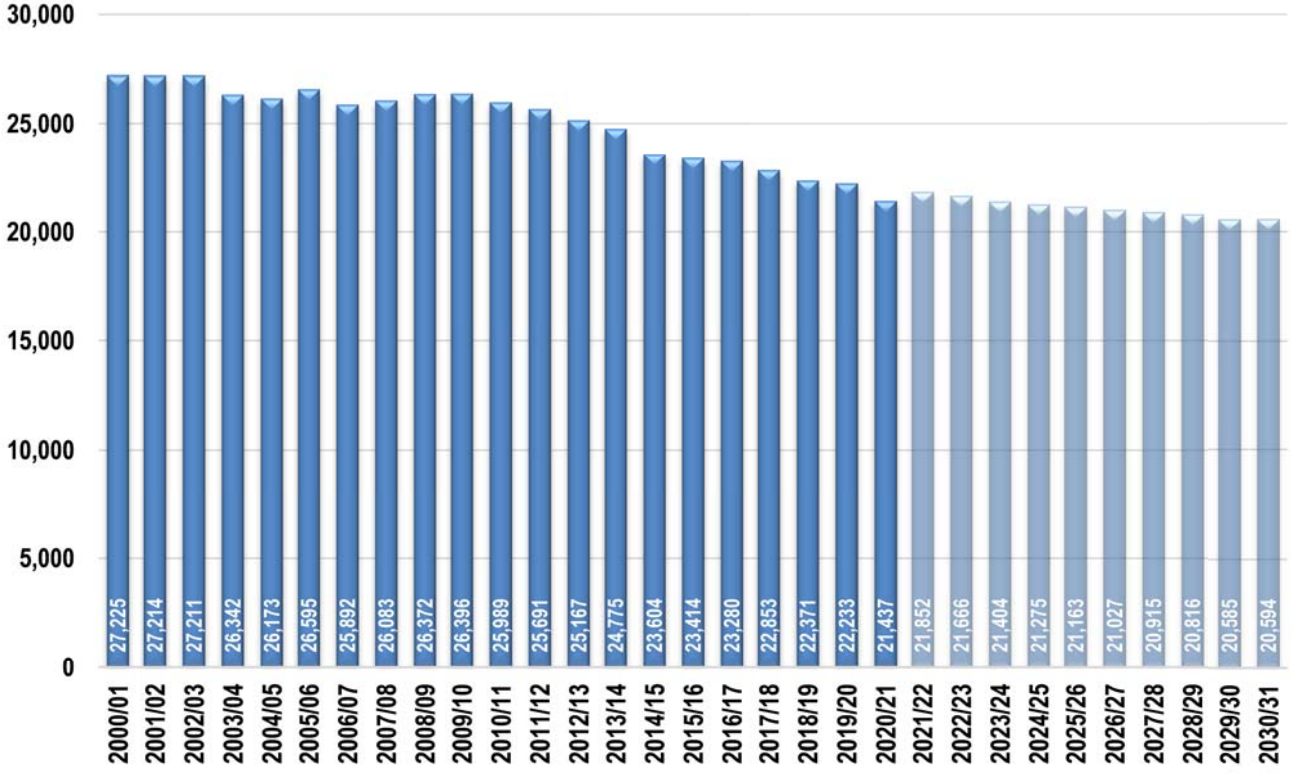
TABLE 15
HISTORIC AND PROJECTED TOTAL ENROLLMENT BY LEVEL

	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	8,562	4,939	13,501	8,351	21,852	415	1.9%	39.2%	22.6%	38.2%
2022/23	8,463	4,872	13,335	8,331	21,666	-186	-0.8%	39.1%	22.5%	38.5%
2023/24	8,531	4,665	13,196	8,208	21,404	-262	-1.2%	39.9%	21.8%	38.3%
2024/25	8,555	4,536	13,091	8,184	21,275	-129	-0.6%	40.2%	21.3%	38.5%
2025/26	8,594	4,369	12,963	8,200	21,163	-112	-0.5%	40.6%	20.6%	38.7%
2026/27	8,613	4,450	13,063	7,964	21,027	-136	-0.6%	41.0%	21.2%	37.9%
2027/28	8,616	4,495	13,111	7,804	20,915	-113	-0.5%	41.2%	21.5%	37.3%
2028/29	8,605	4,554	13,159	7,657	20,816	-98	-0.5%	41.3%	21.9%	36.8%
2029/30	8,566	4,532	13,098	7,487	20,585	-231	-1.1%	41.6%	22.0%	36.4%
2030/31	8,527	4,511	13,038	7,556	20,594	9	0.0%	41.4%	21.9%	36.7%

Source: Applied Economics, 2021.
Bolding indicates actuals.

Following the return next year of some of the students that were "lost" due to the COVID-19 pandemic, there should only be slight fluctuations from one year to the next, resulting in a steady decline in enrollment over the projection period (**Figure 8**). The post-recession drop in K-5 enrollment will continue to impact both 6-8 and 9-12 enrollment during the projection period, which are each expected to decline by an average of 0.7 and 0.9 percent per year, respectively. Slight K-5 enrollment gains during the first half of the projection period are expected to be offset somewhat by small losses during the second five-year period, resulting in average annual enrollment growth of just 0.2 percent over the next 10 years.

FIGURE 8
ACTUAL AND PROJECTED K-12 ENROLLMENT



Sources: Scottsdale Unified School District Applied Economics, 2021.

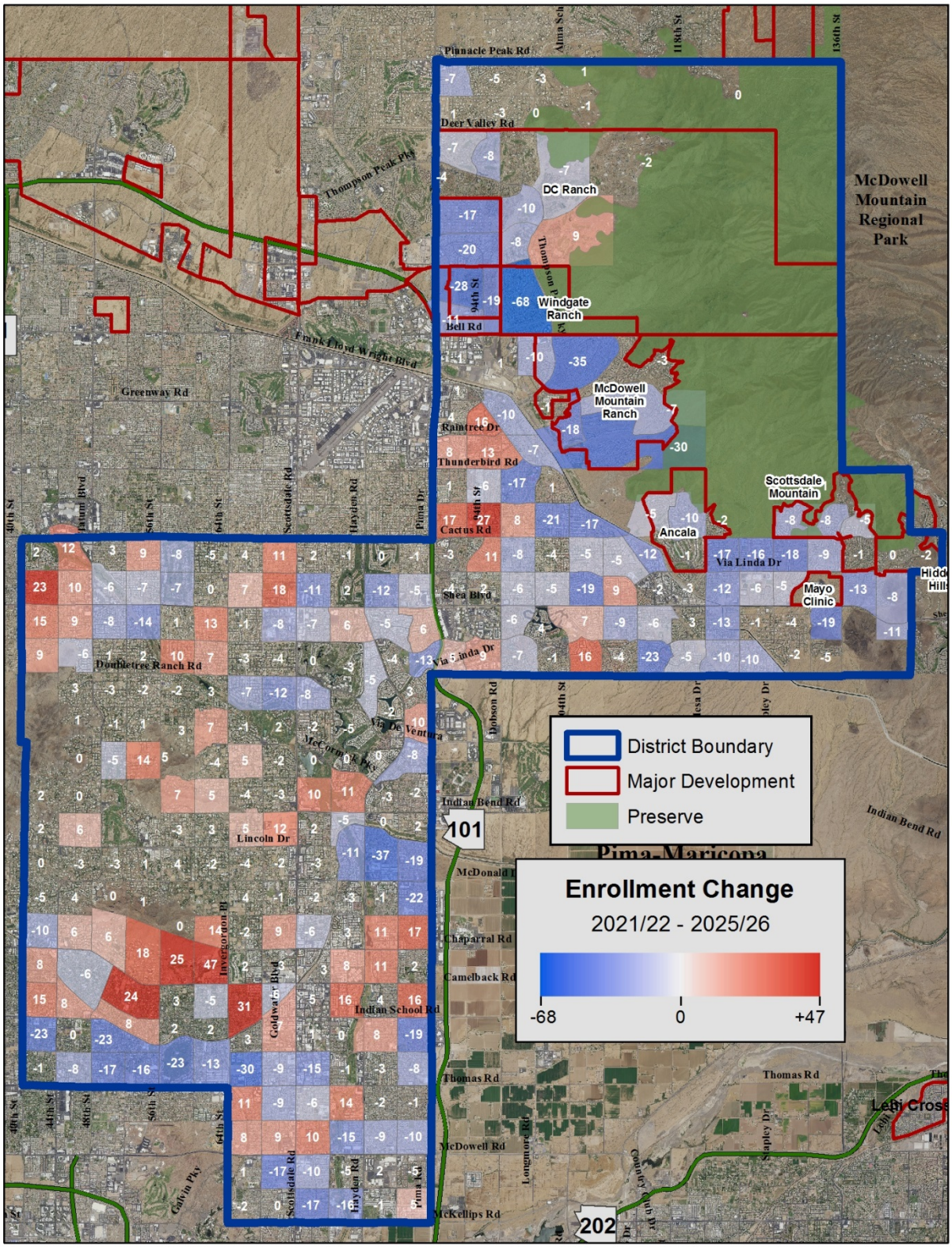
5.0 Sub-District Projections

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.

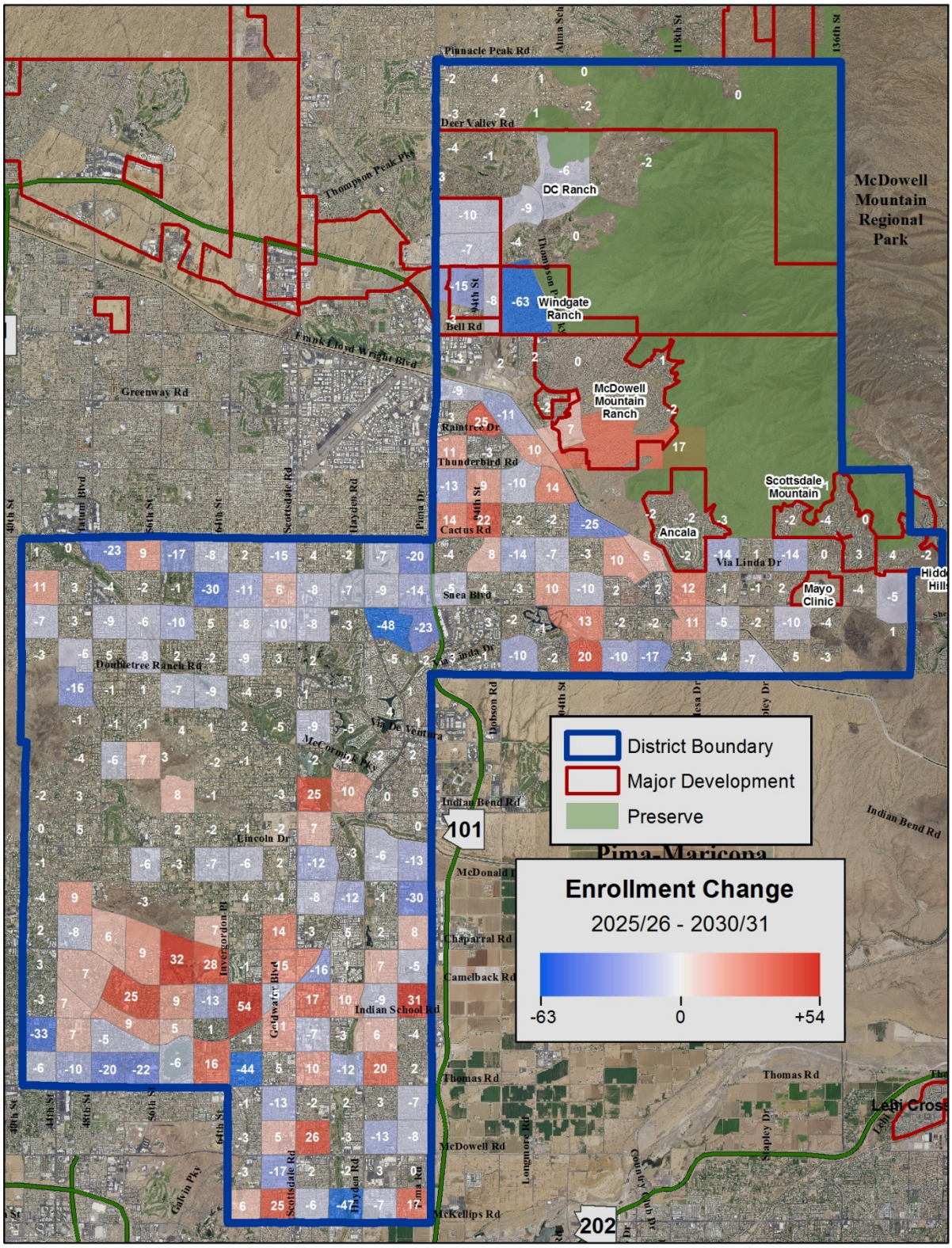
The sub-District analysis aggregates grid-level enrollment by attendance area, which is most closely linked to the characteristics of the population in specific parts of the District. These projections are used in conjunction with the analysis of residence versus enrollment in the final part of the section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

The grid-level projections are illustrated by **Maps 11** and **12**, which show the expected change in enrollment by grid for the 2021/22 to 2025/26 and 2025/26 to 2030/31 time periods, respectively. The maps generally show large areas with declines, particularly in the northern part of the District; however, some regeneration is expected over the next five years, particularly in the southern portion of the District, resulting in numerous areas with moderate enrollment gains. This trend will likely to continue into the second half of the projection period, as losses in the northern portion of the District lessen and make way for moderate increases.

MAP 11
ENROLLMENT CHANGE: 2021/22 - 2025/26



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



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. Tables containing detailed demographic information by community are included in **Appendix A** of this report.

5.1.1 Arcadia Community

As shown on **Table 16**, enrollment in Arcadia Community schools fluctuated within a fairly narrow margin of plus or minus 160 students from 2009/10 through 2016/17; peak enrollment of about 4,600 students occurred four times during this period, most recently in 2016/17. Since 2016/17, K-12 enrollment in this community has declined by 450 students, 260 of which were lost just this year; enrollment actually increased slightly (76 students) in 2019/20. This is an older, well-established area, so large changes in enrollment would not normally be expected. Total population in this region has grown by 5.9 percent since 2010, but the population aged 5 to 13 years declined by 4.7 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 fluctuate slightly over the next 10 years but ultimately remain nearly unchanged, totaling roughly 4,100 K-12 students by 2030/31.

TABLE 16
ARCADIA COMMUNITY ENROLLMENT

		Enrollment by Level				K-12 Total		
Fall	PS	K-5	6-8	K-8	9-12	Enrollment	Change	% Change
2010/11	57	1,865	904	2,769	1,713	4,482	-155	-3.3%
2011/12	49	1,869	987	2,856	1,686	4,542	60	1.3%
2012/13	49	1,877	908	2,785	1,709	4,494	-48	-1.1%
2013/14	44	1,926	967	2,893	1,743	4,636	142	3.2%
2014/15	32	1,814	954	2,768	1,733	4,501	-135	-2.9%
2015/16	66	1,856	941	2,797	1,752	4,549	48	1.1%
2016/17	18	1,856	1,049	2,905	1,734	4,639	90	2.0%
2017/18	11	1,745	1,064	2,809	1,727	4,536	-103	-2.2%
2018/19	66	1,606	1,026	2,632	1,736	4,368	-168	-3.7%
2019/20	55	1,552	1,031	2,583	1,861	4,444	76	1.7%
2020/21	45	1,505	952	2,457	1,728	4,185	-259	-5.8%
2021/22	46	1,518	1,016	2,534	1,719	4,253	68	1.6%
2022/23	46	1,480	1,000	2,480	1,771	4,251	-2	0.0%
2023/24	45	1,494	982	2,476	1,715	4,191	-60	-1.4%
2024/25	45	1,486	967	2,453	1,757	4,210	19	0.5%
2025/26	45	1,522	896	2,418	1,807	4,225	15	0.4%
2026/27	44	1,543	897	2,440	1,722	4,162	-63	-1.5%
2027/28	44	1,567	871	2,438	1,732	4,170	8	0.2%
2028/29	44	1,593	904	2,497	1,652	4,149	-21	-0.5%
2029/30	44	1,613	918	2,531	1,583	4,114	-35	-0.8%
2030/31	44	1,630	930	2,560	1,588	4,148	34	0.8%

Source: Applied Economics, 2021.
Bolding indicates actuals.

5.1.2 Chaparral Community

Between 2015-16 and 2019/20 the Chaparral Community experienced an average increase in enrollment of about two percent per year; therefore it is likely that the 2.3 percent decline in enrollment this year was due to the anomalous effects of the COVID-19 pandemic. At roughly 4,900 K-12 students, 2020/21 enrollment in this community equals total enrollment at the beginning of the 2018/19 school year (**Table 17**). 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 1,800 people (5.4 percent per year, on average), although the school-age population (ages 5 to 17 years) has remained virtually unchanged; at the same time, the population over 64 years of age grew by an average of more than 26 percent per year, adding more 1,900 persons over the 10-year period. Despite a slowdown in the prime parenting age-group (25 to 44 years), which reduced this cohort's share of the total population (from 19.4 percent to 16.5 percent), the share of persons less than 5 years of age has grown slightly. Since the aging of the population in this community is expected to continue, enrollment in the Chaparral Community is projected to decrease to about 4,700 K-12 students by 2030/31, which represents a loss of about 190 students (3.9 percent) over the 10-year period; most of this decrease will occur during the second half of the projection period.

TABLE 17
CHAPARRAL COMMUNITY ENROLLMENT

		Enrollment by Level				K-12 Total		
Fall	PS	K-5	6-8	K-8	9-12	Enrollment	Change	% Change
2010/11	108	1,736	873	2,609	2,116	4,725	-41	-0.9%
2011/12	129	1,722	890	2,612	2,188	4,800	75	1.6%
2012/13	129	1,677	906	2,583	2,105	4,688	-112	-2.3%
2013/14	123	1,624	892	2,516	2,077	4,593	-95	-2.0%
2014/15	109	1,530	897	2,427	2,063	4,490	-103	-2.2%
2015/16	82	1,629	886	2,515	2,086	4,601	111	2.5%
2016/17	17	1,633	928	2,561	2,219	4,780	179	3.9%
2017/18	11	1,717	907	2,624	2,243	4,867	87	1.8%
2018/19	123	1,733	895	2,628	2,304	4,932	65	1.3%
2019/20	110	1,798	904	2,702	2,347	5,049	117	2.4%
2020/21	119	1,741	913	2,654	2,277	4,931	-118	-2.3%
2021/22	121	1,786	948	2,734	2,271	5,005	74	1.5%
2022/23	120	1,745	1,004	2,749	2,198	4,947	-58	-1.2%
2023/24	119	1,747	946	2,693	2,209	4,902	-45	-0.9%
2024/25	120	1,700	970	2,670	2,260	4,930	28	0.6%
2025/26	120	1,690	929	2,619	2,330	4,949	19	0.4%
2026/27	120	1,679	941	2,620	2,334	4,954	5	0.1%
2027/28	118	1,666	895	2,561	2,318	4,879	-76	-1.5%
2028/29	117	1,654	892	2,546	2,291	4,837	-41	-0.8%
2029/30	115	1,642	887	2,529	2,216	4,745	-92	-1.9%
2030/31	115	1,631	881	2,512	2,226	4,738	-7	-0.2%

Source: Applied Economics, 2021.
Bolding indicates actuals.

5.1.3 Chaparral North Community

The Chaparral North Community schools generally experienced increased K-8 enrollment through 2011/12 (**Table 18**) since this was the District's primary area for new single family housing construction. From 2010 to 2020, the overall population in this community continued to grow, averaging nearly 26 percent per year. This growth was mirrored by strong increases in every age group except the 5 to 13 cohort, which declined by an average of nearly 12 percent per year during the ten-year period. In terms of households, the largest increases were for those with householders aged 45 years and older (which are typically associated with an older student profile), causing this group's share of the total population to increase sharply, from 44 percent in 2010 to 52 percent in 2020; with annual average growth of 75.9 percent, the increase in the 65 and Up age group far exceeded growth in the overall population over the past 10 years. Despite strong population growth in the Chaparral North community over the past ten years, enrollment in its schools has declined every year since 2012/13, and at an increasing rate; fueled by growth in charter and private schools, the community has experienced annual losses of 10 percent or more every year since 2017/18. With future construction in this area waning, enrollment declines are expected to continue; these losses will be particularly strong during the first half of the projection period, resulting in K-8 enrollment of just 485 students (down 15.8 percent compared to 2020/21) at the end of the projection period.

TABLE 18
CHAPARRAL NORTH COMMUNITY ENROLLMENT

		Enrollment by Level		K-8 Total		
Fall	PS	K-5	6-8	Enrollment	Change	% Change
2010/11	86	839	368	1,207	-2	-0.2%
2011/12	91	797	433	1,230	23	1.9%
2012/13	91	750	448	1,198	-32	-2.6%
2013/14	22	702	461	1,163	-35	-2.9%
2014/15	31	634	451	1,085	-78	-6.7%
2015/16	68	622	439	1,061	-24	-2.2%
2016/17	12	551	449	1,000	-61	-5.7%
2017/18	11	477	400	877	-123	-12.3%
2018/19	34	379	374	753	-124	-14.1%
2019/20	33	339	302	641	-112	-14.9%
2020/21	18	296	280	576	-65	-10.1%
2021/22	19	321	275	596	20	3.5%
2022/23	18	315	247	562	-34	-5.7%
2023/24	17	305	221	526	-36	-6.4%
2024/25	16	314	196	510	-16	-3.0%
2025/26	16	327	175	502	-8	-1.6%
2026/27	16	322	165	487	-15	-3.0%
2027/28	16	316	177	493	6	1.2%
2028/29	16	312	191	503	10	2.0%
2029/30	16	307	187	494	-9	-1.8%
2030/31	16	301	184	485	-9	-1.8%

Source: Applied Economics, 2021.
Bolding indicates actuals.

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 **Table 19**. Recent additions to the housing supply have nearly all been multifamily, which has contributed to a steady decline in the population per household. Due to continued construction in the area, the school-age population within the community is expected to increase during the first half of the projection period and then decline during the second five-year period; in total, the community's school-age population is projected to increase by about 130 students (just 2.4 percent) over the next ten years. The limited growth in the school-age population and continued declines in the community's capture rate is expected to hinder enrollment growth during the projection period. Following a brief period of enrollment increases, as students "lost" this year due to the COVID-19 pandemic return, enrollment is projected to decline by an average of one percent per year beginning in 2023/24. Overall, enrollment in the Coronado Community is projected to increase by 120 students over the next 10 years, resulting in K-12 enrollment of about 2,600 students by 2030/31.

TABLE 19
CORONADO COMMUNITY ENROLLMENT

		Enrollment by Level				K-12 Total		
Fall	PS	K-5	6-8	K-8	9-12	Enrollment	Change	% Change
2010/11	221	1,922	849	2,771	1,365	4,136	-78	-1.9%
2011/12	222	1,953	807	2,760	1,242	4,002	-134	-3.2%
2012/13	222	1,961	760	2,721	1,258	3,979	-23	-0.6%
2013/14	186	1,869	737	2,606	1,076	3,682	-297	-7.5%
2014/15	166	1,720	678	2,398	1,042	3,440	-242	-6.6%
2015/16	150	1,673	645	2,318	1,038	3,356	-84	-2.4%
2016/17	39	1,623	579	2,202	1,072	3,274	-82	-2.4%
2017/18	25	1,526	563	2,089	948	3,037	-237	-7.2%
2018/19	198	1,459	533	1,992	942	2,934	-103	-3.4%
2019/20	161	1,398	520	1,918	902	2,820	-114	-3.9%
2020/21	110	1,216	477	1,693	811	2,504	-316	-11.2%
2021/22	122	1,338	513	1,851	926	2,777	273	10.9%
2022/23	123	1,327	508	1,835	957	2,792	15	0.5%
2023/24	121	1,349	484	1,833	909	2,742	-50	-1.8%
2024/25	120	1,358	466	1,824	903	2,727	-15	-0.5%
2025/26	119	1,368	450	1,818	879	2,697	-30	-1.1%
2026/27	118	1,389	460	1,849	835	2,684	-13	-0.5%
2027/28	117	1,396	461	1,857	810	2,667	-17	-0.6%
2028/29	115	1,387	455	1,842	778	2,620	-47	-1.8%
2029/30	114	1,391	457	1,848	748	2,596	-24	-0.9%
2030/31	115	1,404	460	1,864	760	2,624	28	1.1%

Source: Applied Economics, 2021.
Bolding indicates actuals.

5.1.5 Desert Mountain Community

The total population of the Desert Mountain Community declined by nearly 320 people between 2010 and 2020, which equates to an annual average decrease of about 0.5 percent since 2010. During this period, declines occurred in all but the two oldest age groups (persons over 44 years of age). The strongest growth over the past 10 years has been in the 65 and Up cohort, which grew at an annual average rate of 12.5 percent, followed by 3.5 percent annual average growth in the 45 to 65 age group; as a result, these two cohorts now comprise more than 53 percent of the community's total population (up from 50 percent in 2010). The most significant losses since 2010 occurred in the Under 5 and 25 to 44 year age groups. These demographic shifts are reflected in the area's declining enrollment over the past ten years, as shown on **Table 20**. Given the market orientation of much of the housing in this community, it is not surprising that the share of householders aged 44 years and younger also declined (from 33 percent in 2010 to 30 percent in 2020), while the share of householders over the age of 54 years increased from 44.4 percent to 47.5 percent over the past 10 years. As a result, this is one of the few parts of the District where the school-age population is projected to decline throughout the projection period, decreasing by about 350 persons (3.8 percent) over the next ten years. The effect of this decline in the school-age population will likely be exaggerated by continued competition from charter and private schools in the area. Overall, this community is projected to experience a net loss of more than 500 students (9.2 percent) by 2030/31, resulting in total enrollment of 5,100 K-12 students.

TABLE 20
DESERT MOUNTAIN COMMUNITY ENROLLMENT

		Enrollment by Level				K-12 Total		
Fall	PS	K-5	6-8	K-8	9-12	Enrollment	Change	% Change
2010/11	201	3,350	1,899	5,249	2,335	7,584	-101	-1.3%
2011/12	190	3,189	1,918	5,107	2,291	7,398	-186	-2.5%
2012/13	190	3,060	1,771	4,831	2,291	7,122	-276	-3.7%
2013/14	178	2,966	1,790	4,756	2,275	7,031	-91	-1.3%
2014/15	174	2,737	1,650	4,387	2,252	6,639	-392	-5.6%
2015/16	140	2,590	1,605	4,195	2,252	6,447	-192	-2.9%
2016/17	25	2,397	1,537	3,934	2,191	6,125	-322	-5.0%
2017/18	28	2,396	1,511	3,907	2,163	6,070	-55	-0.9%
2018/19	168	2,315	1,489	3,804	2,131	5,935	-135	-2.2%
2019/20	201	2,254	1,440	3,694	2,058	5,752	-183	-3.1%
2020/21	144	2,237	1,350	3,587	2,027	5,614	-138	-2.4%
2021/22	143	2,248	1,343	3,591	1,987	5,578	-36	-0.6%
2022/23	140	2,248	1,306	3,554	1,926	5,480	-98	-1.8%
2023/24	138	2,264	1,257	3,521	1,890	5,411	-69	-1.3%
2024/25	136	2,294	1,209	3,503	1,848	5,351	-60	-1.1%
2025/26	135	2,284	1,206	3,490	1,818	5,308	-43	-0.8%
2026/27	134	2,278	1,234	3,512	1,761	5,273	-35	-0.7%
2027/28	134	2,275	1,281	3,556	1,698	5,254	-19	-0.4%
2028/29	132	2,246	1,269	3,515	1,678	5,193	-61	-1.2%
2029/30	131	2,215	1,252	3,467	1,669	5,136	-57	-1.1%
2030/31	130	2,184	1,236	3,420	1,680	5,100	-36	-0.7%

Source: Applied Economics, 2021.
Bolding indicates actuals.

5.1.6 Saguaro Community

As shown on **Table 21,** enrollment in Saguaro Community schools has been declining for most of the past 20 years; a significant loss was recorded in 2014/15 when several new charter schools opened in the attendance area. Between 2010 and 2020, the total population in the Saguaro Community grew by an average rate of 16.5 percent per year; this healthy growth was mirrored in the annual average growth of all of the age groups, although growth in the school-age population (5 to 17 year olds) was somewhat less than the other cohorts during the 10-year period. Among householders, the strongest growth has occurred in Under 34 age group, which now accounts for more than 22 percent of the total households in the community; at the same time, householders over 64 years of age also experienced strong growth and this cohort now accounts for nearly 34 percent of all households. Changes in the school-age population are expected to be limited as losses that are expected during the first five-year period are offset by growth in the second half of the projection period, resulting in a net increase of about 180 children over the next 10 years. Overall, enrollment in the Saguaro Community is expected to decline by 3.5 percent (130 students) over the next 10 years, totaling about 3,500 students by 2030/31.

TABLE 21
SAGUARO COMMUNITY ENROLLMENT

		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	127	1,351	844	2,195	1,448	3,643	16	0.4%
2022/23	127	1,348	807	2,155	1,479	3,634	-9	-0.2%
2023/24	127	1,372	775	2,147	1,485	3,632	-2	-0.1%
2024/25	124	1,403	728	2,131	1,416	3,547	-85	-2.3%
2025/26	122	1,403	713	2,116	1,366	3,482	-65	-1.8%
2026/27	121	1,402	753	2,155	1,312	3,467	-15	-0.4%
2027/28	120	1,396	810	2,206	1,246	3,452	-15	-0.4%
2028/29	122	1,413	843	2,256	1,258	3,514	62	1.8%
2029/30	122	1,398	831	2,229	1,271	3,500	-14	-0.4%
2030/31	122	1,377	820	2,197	1,302	3,499	-1	0.0%

Source: Applied Economics, 2021.
Bolding indicates actuals.

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 previously on Map 1. **Table 22** displays the projected enrollment by attendance area for 2021/22 through 2030/31 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). Note that Hohokam attendance area enrollment is currently attributed to Yavapai while Hohokam is being renovated.

Among elementary (K-5 and K-8) schools, the Redfield (910 students), Yavapai (728 students) and Hopi (712 students) attendance areas are projected to have the largest number of students by 2030/31. With roughly 300 students each, the smallest K-5 attendance areas in 2030/31 are expected to be Sequoya, Cochise and Cherokee; all three of these areas are also projected to experience enrollment declines over the next 10 years. In all, nine of the 15 elementary attendance areas are projected to see enrollment increases, ranging from just one student to 91 students, over the next 10 years; the largest elementary gains are expected in the Yavapai (91 students), Hopi (89) students and Redfield (88 students) attendance areas; in all three areas the vast majority of the increase is expected to occur during the first half of the projection period. Among the remaining elementary areas, the largest losses are expected in the Copper Ridge (-175 students) and Cochise (-86 students) attendance areas.

The Desert Canyon (702 students), Mohave (648 students) and Ingleside (618 students) middle school attendance areas are projected to have the largest number of 6-8 students by the end of the projection period, and each of these areas are expected to experience moderate enrollment increases (40 to 80 students) over the next 10 years. With a total of 702 students by 2030/31, the Desert Canyon Middle School attendance area is projected to be the largest at the end of the projection period. Enrollment losses are projected for the Cocopah (-129 students) and Mountainside (-50 students) attendance areas, making them the two smallest attendance areas by 2030/31. The number of K-8 students from outside of the District is expected to decline by about 200 students (7.2 percent) over the next 10 years.

Among high schools, the Desert Mountain attendance area is currently the largest with 2,034 students; although the area is expected to lose nearly 550 students over the next decade; with total resident enrollment of about 1,500 students the area will continue to be the largest in 2030/31. With the exception of Saguaro, the remaining high school attendance areas are each projected to see declines in enrollment ranging from 30 students to 200 students; Saguaro's attendance area enrollment is expected to increase slightly, adding about 60 students over the next 10 years. The number of 9-12 students from outside the District is projected to remain nearly unchanged, increasing by about 50 students (2.7 percent) during the 10-year period.

TABLE 22
ACTUAL AND PROJECTED ENROLLMENT BY ATTENDANCE AREA

Attendance Area	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31
Ingleside Middle School	596	591	656	651	630	612	551	604	602	623	604	573	595	601	638	618	618
Hopi Elementary School	522	516	538	538	562	570	623	655	663	669	685	703	703	709	712	711	712
Tavan Elementary School	638	654	617	593	532	484	430	420	416	413	403	416	411	416	417	410	405
Echo Canyon K-8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Cocopah Middle School	704	660	704	662	627	595	615	620	636	561	552	517	524	507	510	497	486
Cherokee Elementary School	320	307	322	320	338	348	325	341	320	322	308	303	300	294	288	280	274
Cochise Elementary School	424	442	396	413	410	416	379	367	365	357	339	327	327	318	310	300	293
Sequoya Elementary School	326	336	334	339	334	311	320	327	316	314	321	330	318	316	313	307	302
Copper Ridge School	841	887	840	809	709	620	567	543	518	476	447	434	414	410	409	400	392
Hohokam Traditional School	373	350	379	359	367	0	0	0	0	0	0	0	0	0	0	0	0
Pima Elementary School	417	396	402	392	371	387	377	407	418	423	425	431	437	440	442	441	444
Tonalea K-8	1,199	1,175	1,143	1,159	1,165	1,120	1,032	982	922	853	867	868	909	941	960	954	967
Yavapai Elementary School	439	432	414	406	409	721	637	657	645	672	693	706	705	714	721	723	728
Desert Canyon Middle School	776	788	762	751	708	712	660	692	670	641	632	638	677	700	701	700	702
Desert Canyon Elementary School	513	471	441	425	380	330	329	348	361	378	381	385	386	389	390	389	389
Redfield Elementary School	878	837	816	845	853	842	822	857	854	875	899	898	905	910	913	910	910
Cheyenne Traditional School	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Mountainside Middle School	722	670	654	610	610	558	524	537	529	527	503	476	450	456	472	474	474
Anasazi Elementary School	581	559	489	479	414	433	426	436	424	411	420	429	432	435	438	438	439
Laguna Elementary School	507	479	419	397	407	407	408	418	417	409	409	419	428	431	435	436	439
Mohave Middle School	575	566	565	556	568	585	569	600	648	668	632	618	627	675	663	652	648
Kiva Elementary School	377	376	382	402	388	386	389	403	401	395	408	414	415	411	406	397	390
Navajo Elementary School	710	698	693	647	613	632	575	600	584	586	607	593	593	595	593	586	582
Pueblo Elementary School	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Out of District	2,753	2,802	2,808	2,737	2,603	2,713	2,634	2,687	2,626	2,624	2,556	2,483	2,508	2,442	2,429	2,474	2,445
Total	15,191	14,992	14,774	14,490	13,998	13,782	13,192	13,501	13,335	13,196	13,091	12,963	13,063	13,111	13,159	13,098	13,038

Source: Scottsdale Unified School District, Applied Economics, 2021.

TABLE 22 (continued)
ACTUAL AND PROJECTED ENROLLMENT BY ATTENDANCE AREA

Attendance Area	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31
Arcadia High School	984	1,013	1,026	1,068	1,032	1,051	1,060	1,025	1,034	1,000	1,007	1,034	1,029	1,066	1,005	1,021	1,027
Chaparral High School	1,414	1,422	1,469	1,456	1,535	1,463	1,420	1,508	1,493	1,577	1,642	1,599	1,552	1,449	1,372	1,306	1,301
Coronado High School	1,158	1,170	1,160	1,089	1,043	1,020	969	1,080	1,151	1,141	1,092	1,011	895	811	814	816	862
Desert Mountain High	2,205	2,190	2,133	2,110	2,087	2,060	2,034	1,933	1,822	1,693	1,597	1,603	1,552	1,521	1,498	1,472	1,489
Saguaro High School	943	938	929	904	883	903	843	871	861	846	851	908	938	915	936	909	905
Out of District	1,709	1,692	1,790	1,736	1,793	1,954	1,919	1,933	1,971	1,950	1,996	2,045	1,999	2,041	2,032	1,964	1,971
Total	8,413	8,425	8,507	8,363	8,373	8,451	8,245	8,351	8,331	8,208	8,184	8,200	7,964	7,804	7,657	7,487	7,556

Source: Scottsdale Unified School District, Applied Economics, 2021.

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 23** and **24** display the distributions of enrollment by school versus enrollment by attendance area for elementary and high school students in 2020/21. 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 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 941 students enrolled who also live in the Arcadia attendance area. There are 11 students at Arcadia who reside in the Chaparral (2000) attendance area, 97 from Coronado, and so on. There are 650 students from outside the District who attend Arcadia, resulting in total enrollment of 1,728 students. The Arcadia attendance area contains 1,060 students, although 27 attend Chaparral, 49 are at Coronado, and so forth. Arcadia has a net gain of 668 students from outside of its attendance area since enrollment is 1,728 but there are only 1,060 students residing in that attendance area; the school captures 89 percent of the District students living within its attendance area.

Overall, only 63 percent of the K-8 students from within the District attend the school designated for their place of residence, while 80 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 (56 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 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. Students at Hohokam Elementary have been temporarily relocated to Yavapai Elementary while the campus undergoes renovation so these areas have been combined for the purpose of this analysis. With more than 300 students each, Cherokee Elementary and Mohave Middle School had the largest net additions among K-8 schools with defined attendance areas. The K-8 schools with the highest net losses in enrollment include Redfield Elementary (-356 students), Tonalea K-8 (-244 students) and Navajo Elementary (-191 students).

TABLE 23
SCHOOL VERSUS ATTENDANCE AREA ENROLLMENT (K-8th GRADE): 2020/21

School Attended / School ID		School Attendance Area of Residence																					Outside District	Total Attend	Total Reside	Diff.
		100	101	102	200	201	202	203	301	401	402	403	404	500	501	502	600	601	602	700	701	702				
Ingleside Middle School	100	464			3							50					1			12			281	811	551	260
Hopi Elementary School	101		571	50				1		1	4	9										3	71	710	623	87
Tavan Elementary School	102		7	221						3	1	18	6			1		1				6	332	596	430	166
Echo Canyon K-8	103	40	17	31						8	7	47	14	1						8	2	6	159	340	0	340
Cocopah Middle School	200	7			564				5			9		52			14			73			189	913	615	298
Cherokee Elementary School	201		6	9		295	17	49			6	1				8		2	2		59	4	175	633	325	308
Cochise Elementary School	202		1	2		9	326	8	3	6	2		3		9	60		8	27		54	11	61	590	379	211
Sequoya Elementary School	203			1		7	2	248		2	1		2		2	8		1	6		5	11	222	518	320	198
Copper Ridge School	301	1			5				416					31	7	11	5	3	1	3			93	576	567	9
Hohokam Traditional School	401																							0	297	-297
Pima Elementary School	402		3	8						56	196	36	30						1		2	32	46	410	377	33
Tonalea K-8	403	18		29	2	3	1			16	24	506	61							9		6	113	788	1032	-244
Hohokam-Yavapai	404			5				1		147	32	33	182			1						11	83	495	340	155
Desert Canyon Middle School	500				10				11			1		382			26			7			44	481	660	-179
Desert Canyon Elementary Sch	501			2				2	14		6	1			231	104		13	4		4	2	57	440	329	111
Redfield Elementary School	502		1	2			7	2	15		2	1			10	324		17	13		6	4	62	466	822	-356
Cheyenne Traditional School	503				12		5	4	94			1		139	65	235	88	70	80	1	2	1	122	919	0	919
Mountainside Middle School	600				7				2					48			384			5			96	542	524	18
Anasazi Elementary School	601								2						1	19		253	36		2	1	82	396	426	-30
Laguna Elementary School	602						6	1	1				1		4	44		46	229		1	2	23	358	408	-50
Mohave Middle School	700	21			12				3			254		7			6			451			129	883	569	314
Kiva Elementary School	701		14	49		6	6	1		16	27	26	5			3		5	3		202	90	81	534	389	145
Navajo Elementary School	702		3	8		1				19	29	27	14								3	224	56	384	575	-191
Pueblo Elementary School	703			13		4	9	3	1	23	40	12	22			4		7	6		47	161	72	424	0	424
Total		551	623	430	615	325	379	320	567	297	377	1,032	340	660	329	822	524	426	408	569	389	575	2,649	13,207	10,558	2,649
Total Attending School of Residence Area																									6,669	
Percent Attending School of Residence Area		84%	92%	51%	92%	91%	86%	78%	73%	0%	52%	49%	54%	58%	70%	39%	73%	59%	56%	79%	52%	39%			63%	

Source: Scottsdale Unified School District, Applied Economics, 2021.

All of the high schools except Coronado (-158 students) and Desert Mountain (-7 students) currently have a net in-migration of students. Arcadia (668 students) and Chaparral (856 students) have the greatest net additions; both schools attract a large number of students from outside of the District and capture nearly 90 percent of the students that reside in their respective attendance areas. While Desert Mountain benefited from the addition of 258 out-of-District students, the school only captured 82 percent of the students that reside within its attendance area, which resulted in the net out-migration of students. At just 56 percent, Coronado High School captured the smallest share of its resident student population; although the school attracted 208 additional students from outside of the District it was not enough to offset the loss from within its attendance area.

TABLE 24
SCHOOL VERSUS ATTENDANCE AREA ENROLLMENT (9th-12th GRADE): 2020/21

		School Attendance Area of Residence						Outside	Total	Total	
School Attended		1000	2000	3000	4000	5000	6000	District	Attend	Reside	Difference
Arcadia High School	1000	941	11		97	10	19	650	1,728	1,060	668
Chaparral High School	2000	27	922	330	15	277	128	578	2,277	1,421	856
Coronado High School	4000	49	1	1	539	1	12	208	811	969	-158
Desert Mountain High	5000	2	31	48	9	1,666	13	258	2,027	2,034	-7
Saguaro High School	6000	41	68	8	309	80	671	225	1,402	843	559
Other/On-line		0	0	1	0	0	0	24	25	0	25
Total		1,060	1,033	388	969	2,034	843	1,943	8,270	6,327	1,943
Total Attending School for Residence Area										5,069	
Percent Attending School of Residence Area		89%	89%	85%	56%	82%	80%			80%	

Source: Scottsdale Unified School District, Applied Economics, 2021.

5.4 Enrollment by School

Tables 25 and **26** show projected enrollment by school for 2021/22 through 2030/31. These projections were derived by combing 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 elementary and middle schools, 12 are projected to have increases in enrollment over the next ten years, with modest growth ranging from just one student to 115 students each. The most growth is expected at Yavapai Elementary School with 115 new students, followed by Redfield Elementary with 108 additional students. Enrollment at both Tavan Elementary and Copper Ridge School is expected to decline by more than 130 students each over the next ten years.

At the high school level, four of the five schools are expected to experience enrollment decreases over the next ten years; only Saguaro High School is projected to see a small enrollment gain (64 students) by 2030/31. The largest loss during the projection period is expected at Desert Mountain (-416 students). Chaparral currently has the largest enrollment, with 2,277 students, followed by Desert Mountain at 2,027 students. Chaparral is still expected to be the largest high school at the end of the projection period, with enrollment of 2,121 students, followed again by Desert Mountain with enrollment totaling 1,611 students. Coronado will continue to be the smallest of the five high schools with enrollment of just 767 students in 2030/31.

TABLE 25
ELEMENTARY ENROLLMENT BY SCHOOL

School Attended		2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31
Ingleside Middle School	100	772	756	861	891	847	850	811	884	896	913	891	855	871	878	917	896	896
Hopi Elementary School	101	839	848	873	827	750	704	710	720	696	681	689	701	694	693	688	682	673
Tavan Elementary School	102	702	721	699	685	639	628	596	578	540	531	491	479	476	480	479	472	462
Echo Canyon K-8	103	455	472	472	406	393	401	340	340	317	328	326	315	322	300	290	296	289
Cocopah Middle School	200	897	886	928	907	894	904	913	924	948	872	861	826	834	816	819	805	795
Cherokee Elementary School	201	484	534	590	633	667	681	632	647	637	638	611	609	607	600	593	586	579
Cochise Elementary School	202	579	613	562	577	575	630	590	589	574	568	551	532	535	528	521	515	507
Sequoya Elementary School	203	467	482	481	507	490	487	518	534	509	518	517	531	528	530	532	531	529
Copper Ridge School	301	1,085	1,061	1,000	877	753	641	576	557	531	492	474	456	442	436	441	446	439
Hohokam Traditional School	401	409	427	436	483	433	0	0	0	0	0	0	0	0	0	0	0	0
Pima Elementary School	402	565	528	503	452	431	444	410	434	444	458	463	466	471	472	470	469	469
Tonalea K-8	403	338	335	914	859	861	898	788	743	673	595	593	591	638	674	698	696	714
Supai Middle School		678	645	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Yavapai Elementary School	404	408	383	349	295	266	576	495	512	514	521	540	555	567	582	595	601	610
Desert Canyon Middle School	500	566	563	530	561	513	515	481	521	525	493	483	488	525	544	542	540	540
Desert Canyon Elementary	501	501	472	457	474	462	454	440	470	483	496	495	493	496	498	497	495	494
Redfield Elementary School	502	484	438	419	452	471	473	466	491	496	525	548	557	567	573	575	574	574
Cheyenne Traditional School	503	976	984	921	937	931	910	904	911	896	889	897	888	890	873	879	904	901
Mountainside Middle School	600	764	689	690	639	651	592	542	552	540	543	521	495	470	477	494	498	500
Anasazi Elementary School	601	567	573	495	473	378	391	396	419	405	390	402	404	405	404	404	403	400
Laguna Elementary School	602	529	476	422	371	394	359	359	371	370	364	372	376	384	387	391	393	395
Mohave Middle School	700	812	783	814	853	892	904	883	900	930	950	913	899	908	956	946	934	929
Kiva Elementary School	701	460	478	467	453	474	532	534	557	558	570	575	561	561	554	548	543	535
Navajo Elementary School	702	363	346	385	375	342	345	384	416	411	427	438	450	440	430	420	405	400
Pueblo Elementary School	703	491	496	505	503	478	463	424	431	442	434	440	436	432	426	420	414	408
Other		0	16	16	12	13	0	0	0	0	0	0	0	0	0	0	0	0
Total		15,191	15,005	14,789	14,502	13,998	13,782	13,192	13,501	13,335	13,196	13,091	12,963	13,063	13,111	13,159	13,098	13,038

Source: Scottsdale Unified School District, Applied Economics, 2021.

TABLE 26
HIGH SCHOOL ENROLLMENT BY SCHOOL

School	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31
Arcadia High School	1,733	1,752	1,734	1,727	1,733	1,861	1,728	1,650	1,636	1,546	1,558	1,609	1,603	1,642	1,580	1,585	1,591
Chaparral High School	2,063	2,086	2,219	2,243	2,301	2,347	2,277	2,333	2,325	2,397	2,500	2,444	2,388	2,290	2,212	2,128	2,121
Coronado High School	1,042	1,038	1,072	948	942	902	811	932	1,020	1,010	978	917	796	718	721	715	767
Desert Mountain High	2,252	2,252	2,191	2,163	2,138	2,058	2,027	1,978	1,870	1,733	1,644	1,676	1,618	1,620	1,610	1,583	1,611
Saguaro High School	1,323	1,297	1,291	1,282	1,259	1,283	1,402	1,458	1,480	1,522	1,504	1,554	1,559	1,534	1,534	1,476	1,466
Total	8,413	8,425	8,507	8,363	8,373	8,451	8,245	8,351	8,331	8,208	8,184	8,200	7,964	7,804	7,657	7,487	7,556

Source: Scottsdale Unified School District, Applied Economics, 2021.

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