London Independent School District

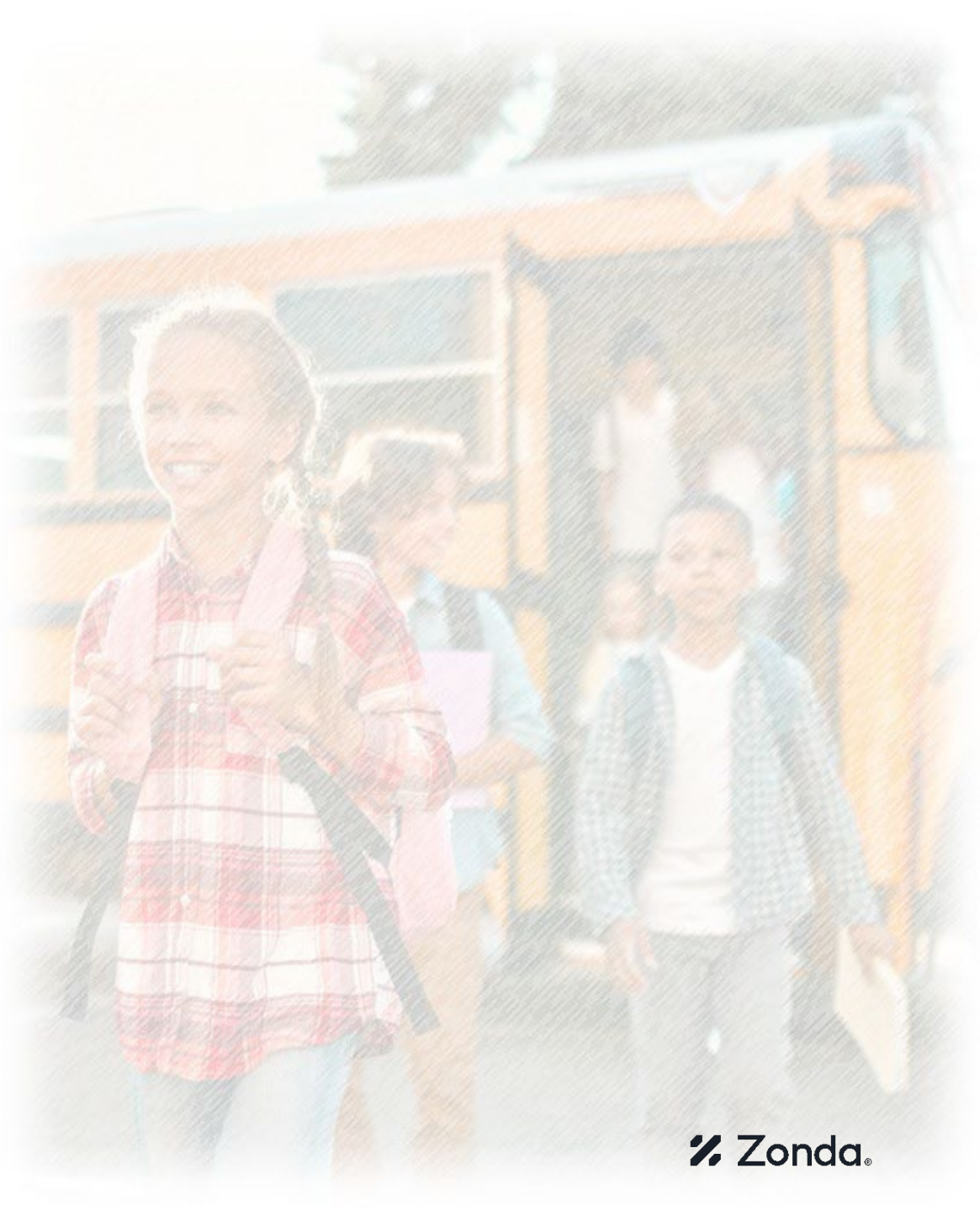
Fall 2026 Enrollment and Housing Report

Zonda Education, November 2026

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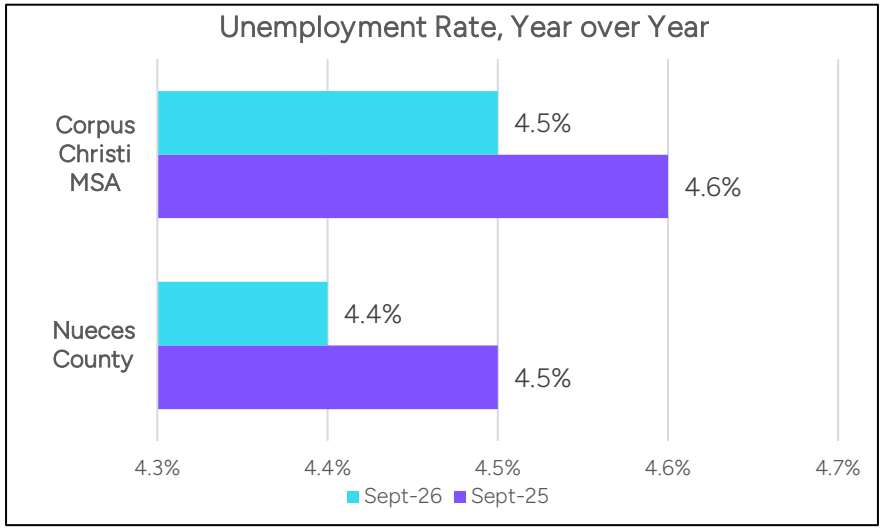
Economic Conditions

Local Economic Data

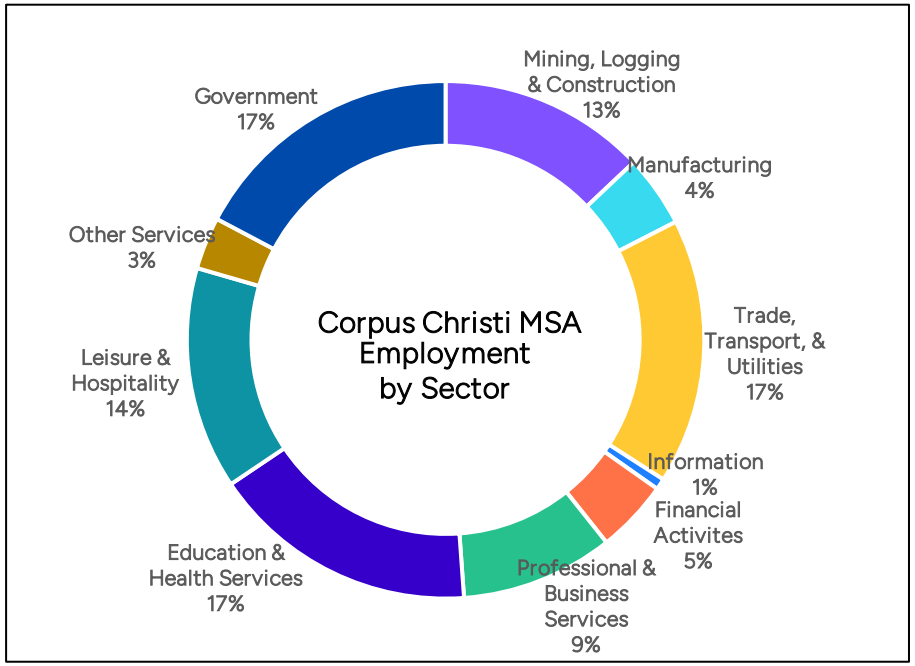
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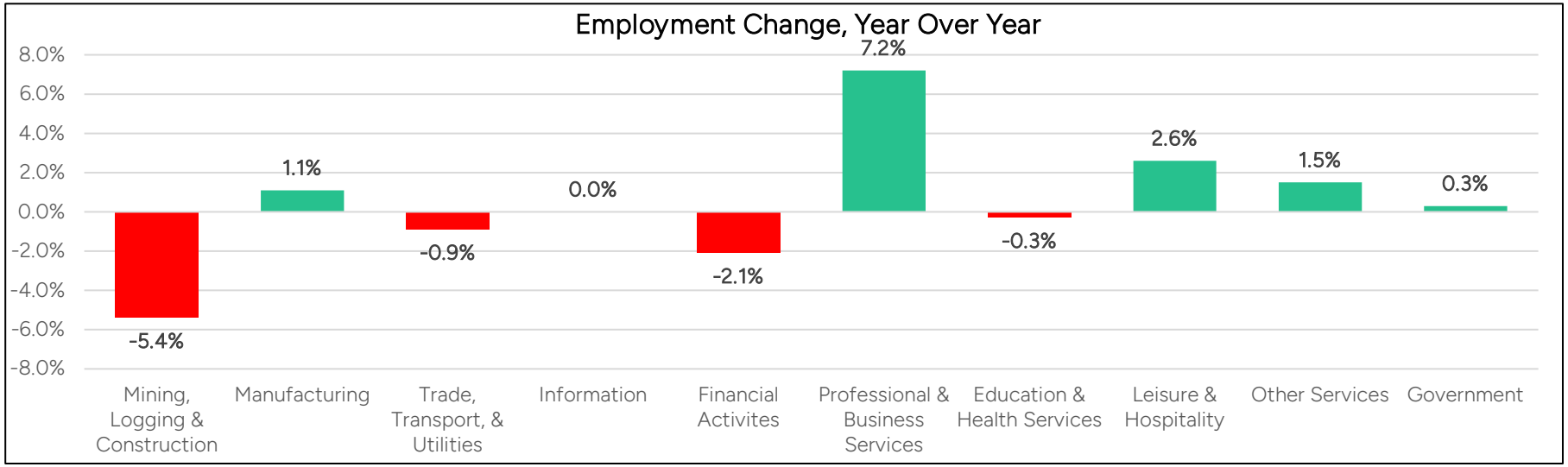
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- Unemployment levels in the region decreased 0.1% from last year numbers
- 200 jobs have been added in the area over the past 12 months
- Largest employers in the area were related to the Education & Health Services and Trade, Transportation, & Utilities sectors
- The sector with the greatest rate of increase in employment the past year was in the Professional & Business Services sector
- The largest rate of decline this past year was in Mining, Logging & Construction



All Industry Sectors	Sep-25	Sep-26	YOY Change
(Corpus Christi MSA) Total Nonfarm Employment #s	202,000	202,200	0.10%





Source: US BLS; US BEA

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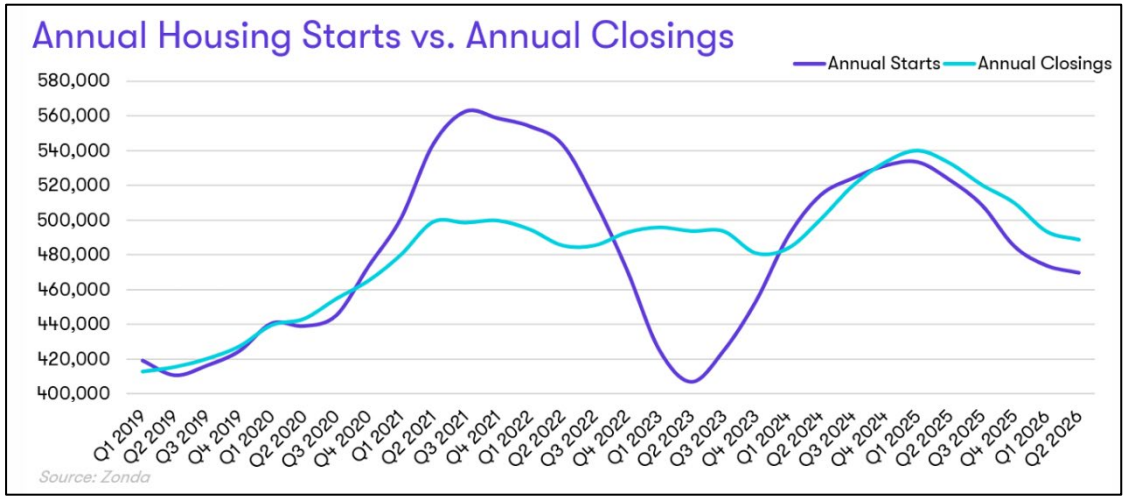
Single Family Housing

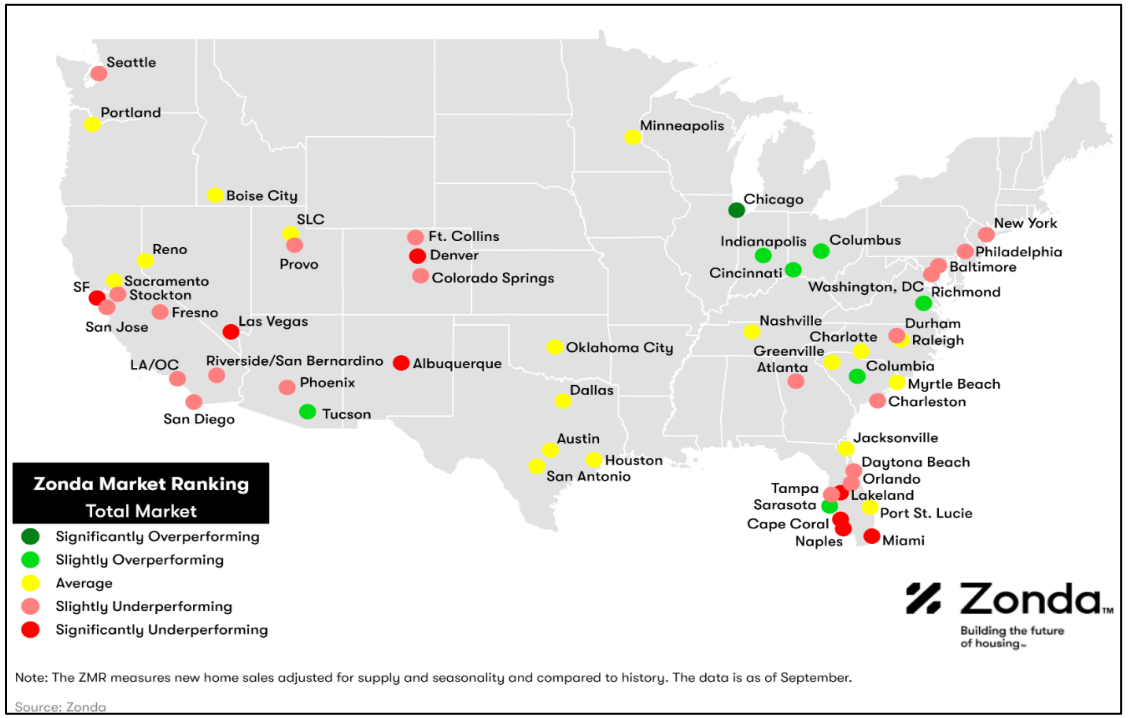
National Market Information & Area Sales Data

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New Home Closings

Closings have continued to decline in 2026 with a -8% YOY decline through Q2. Starts also declined at a greater pace with a -10% YOY decline.

Among Zonda's 55 largest U.S. housing markets, 51% were performing below their historical average for new home sales, 36% were in line with historical norms, and just 13% were exceeding historical performance.

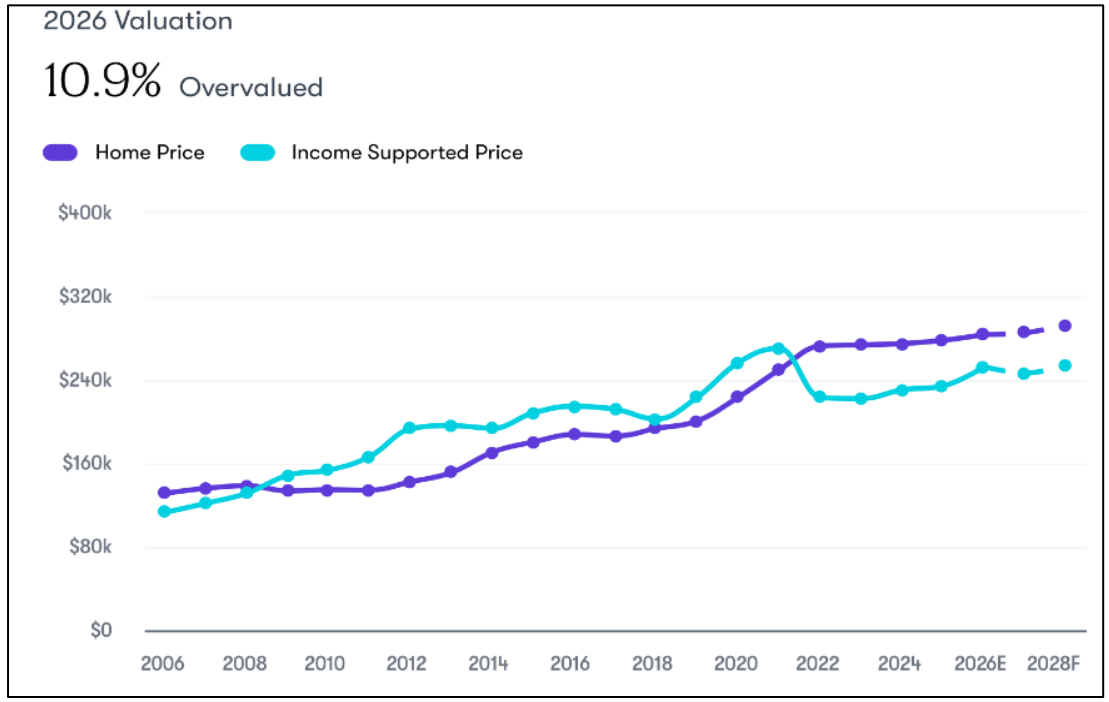
Zonda Market Rating

There were 690,215 new homes sold in September on a seasonally adjusted annualized rate, an increase of 1.7% from last month, and a drop of 4.6% from a year ago.

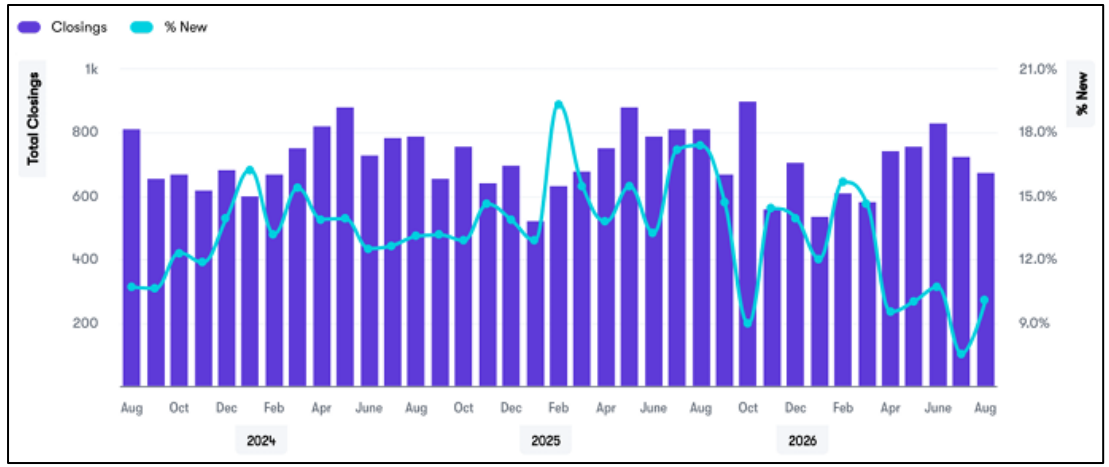
On a non-seasonally adjusted basis, 54,334 homes were sold, 4.6% lower than last year, and 3.0% above the same month in 2019.

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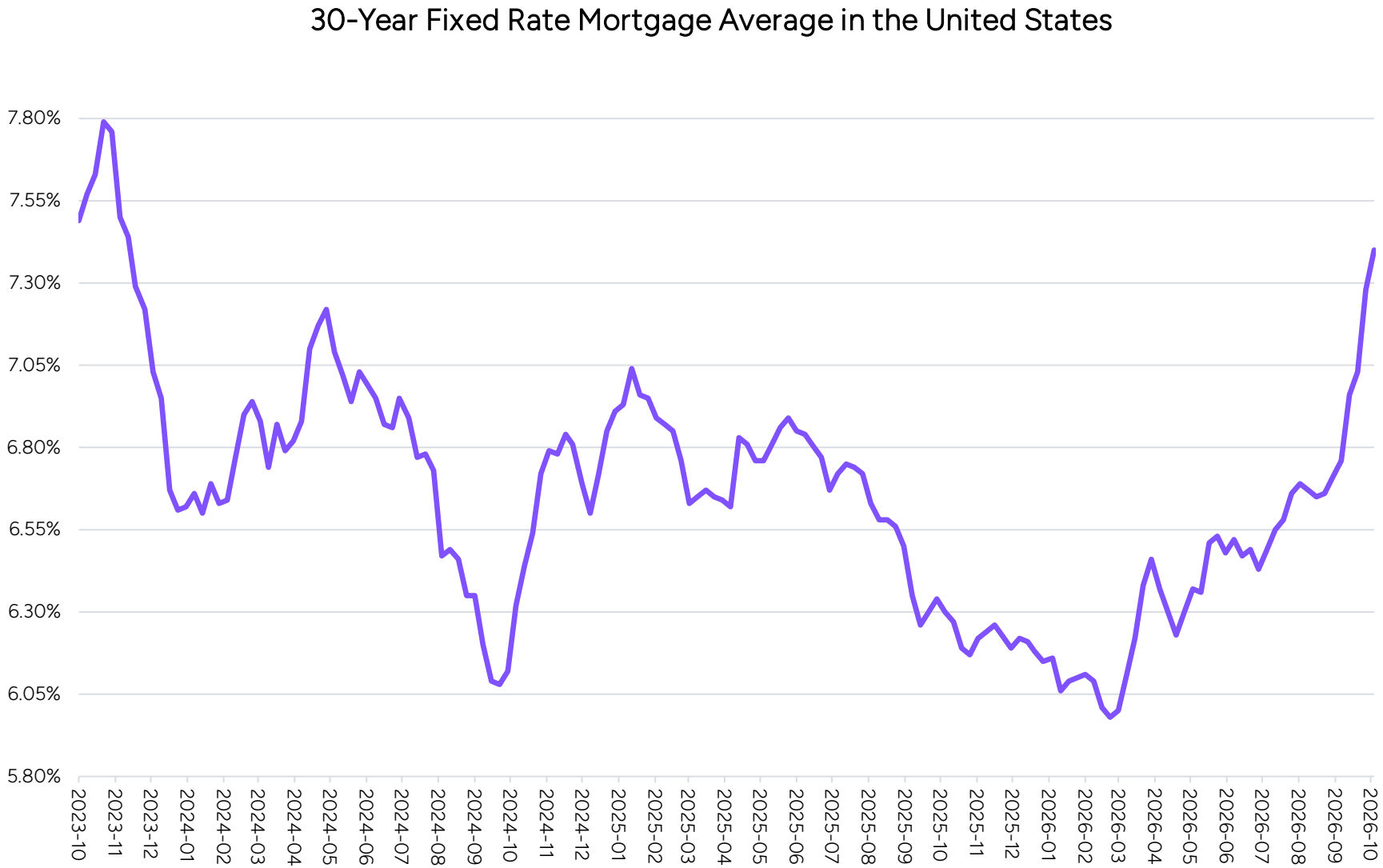


The Corpus Christi MSA housing market is overvalued by approximately 11% based on area incomes. The overvaluation is expected to continue into the future.



New closings' monthly share of total closings declined -25.7% the past year. Existing home closings were essentially flat with a -0.1% change.

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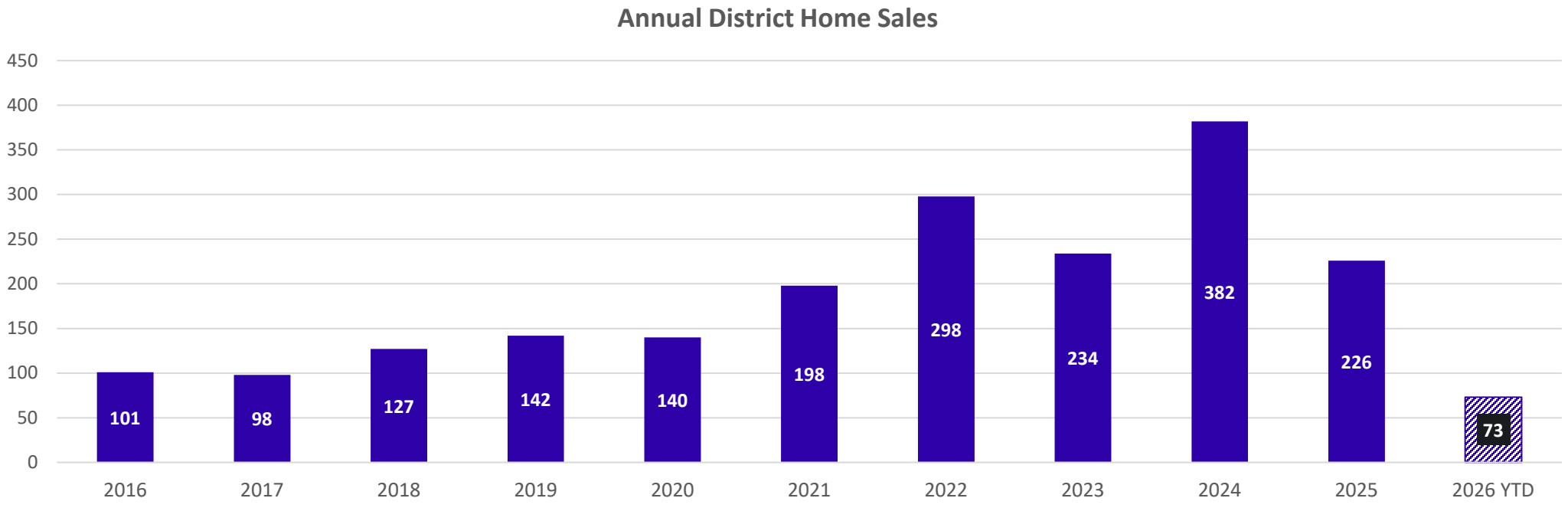
Source: US FRED

The Federal Reserve Board cut rates three times last year from September to December resulting in a reduction of the 30-year fixed rate mortgage average that bottomed out in March 2026 at 6.0%, the lowest since October 2024. The move was driven by signs of a softening labor market and weakening job growth.

Since then, increased economic turbulence has driven rates back up to levels not seen since 2023. Due to inflation, on September 16, the Federal Reserve increased its benchmark rate by 0.25%, its first rate increase since July 2023.

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London ISD – Historical Home Sales

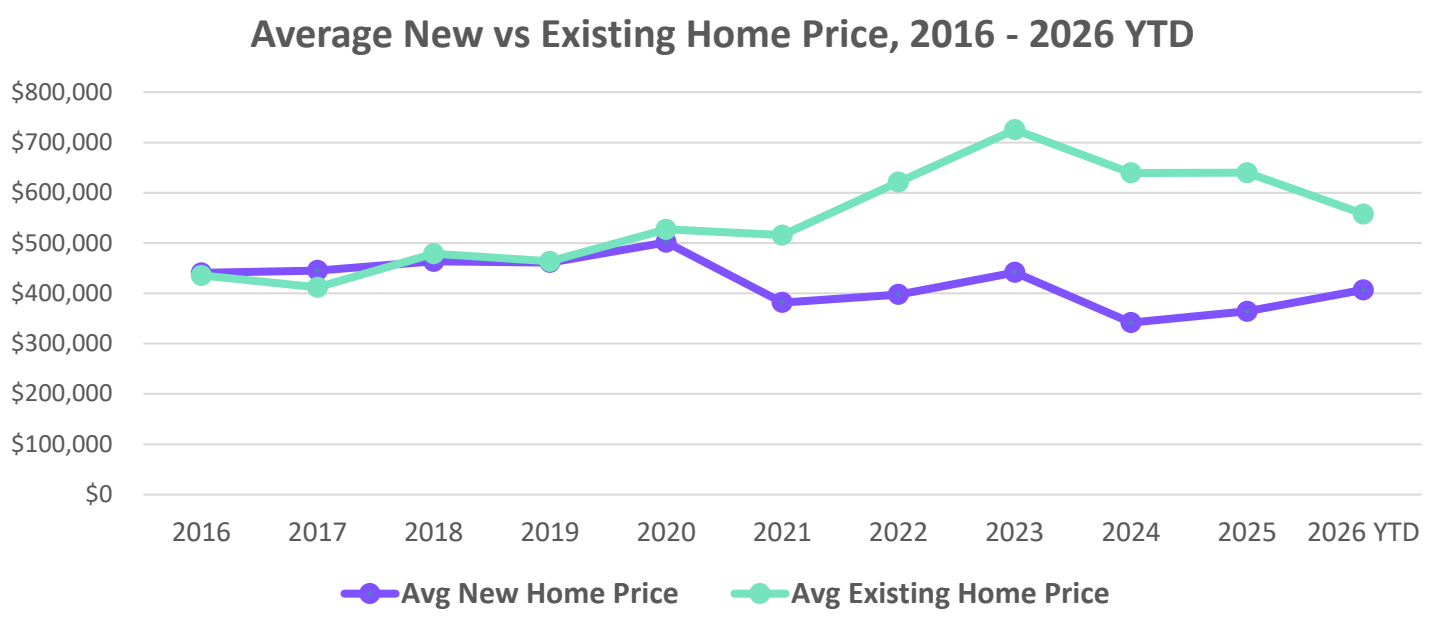


- Historical home sales within the district peaked in 2024 at 382 total sales but declined significantly (41%) last year. 2026 home sales through mid-October are currently trending well below 2025 numbers as continued inflationary pressures and rising interest rates discourage would be homebuyers

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London ISD – Home Price Analysis



Year	Avg New Home Sale Price	Avg Existing Home Sale Price
2015	$438,257	$388,680
2016	$440,537	$435,658
2017	$445,502	$412,008
2018	$463,528	$478,753
2019	$461,308	$463,481
2020	$501,453	$527,068
2021	$381,664	$515,668
2022	$397,778	$621,374
2023	$441,455	$725,357
2024	$341,860	$639,584
2025	$364,178	$639,730
2026 YTD	$406,950	$557,571

- The average existing home sale price in London ISD has risen 65% over the past 10 years (through 2025), an increase of approximately $251,000. However, the 2026 average sale price is down 13% YTD.
- The new home sales price average has fluctuated over the past ten years and was down overall approximately $74,000 or 17% through year-end 2025. 2026 YTD new home sales prices are currently trending nearly 12% higher than 2025.

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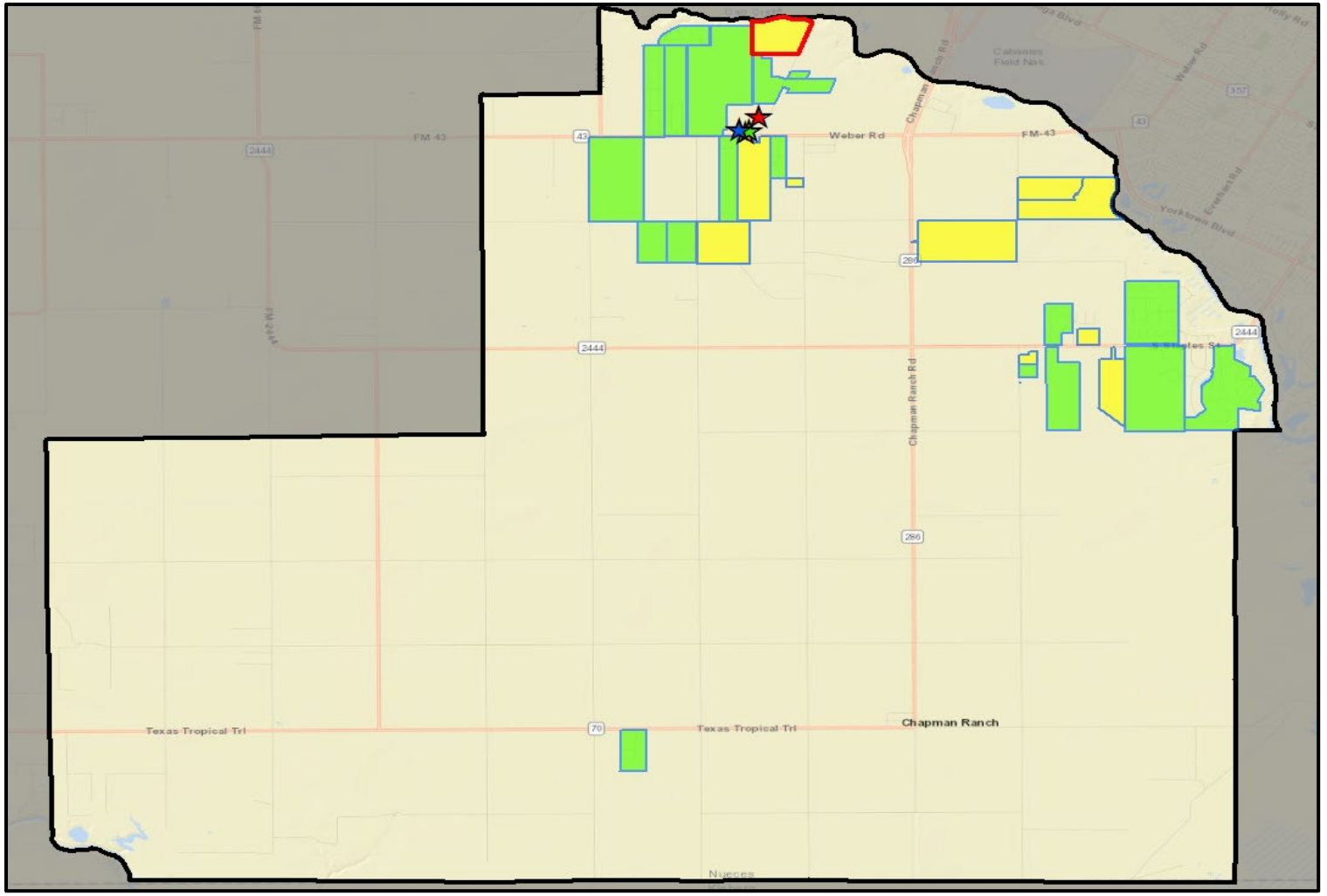
Single Family Housing Construction

District Housing Activity

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London ISD - Future Housing Overview



- The district has 18 active subdivisions with approximately 85 homes under construction and 620 lots ready to be built on
- Within LISD there are currently 10 potential future subdivisions totaling nearly 2,800 single family lots
- Groundwork is currently underway on roughly 100 lots within one subdivision

Subdivisions

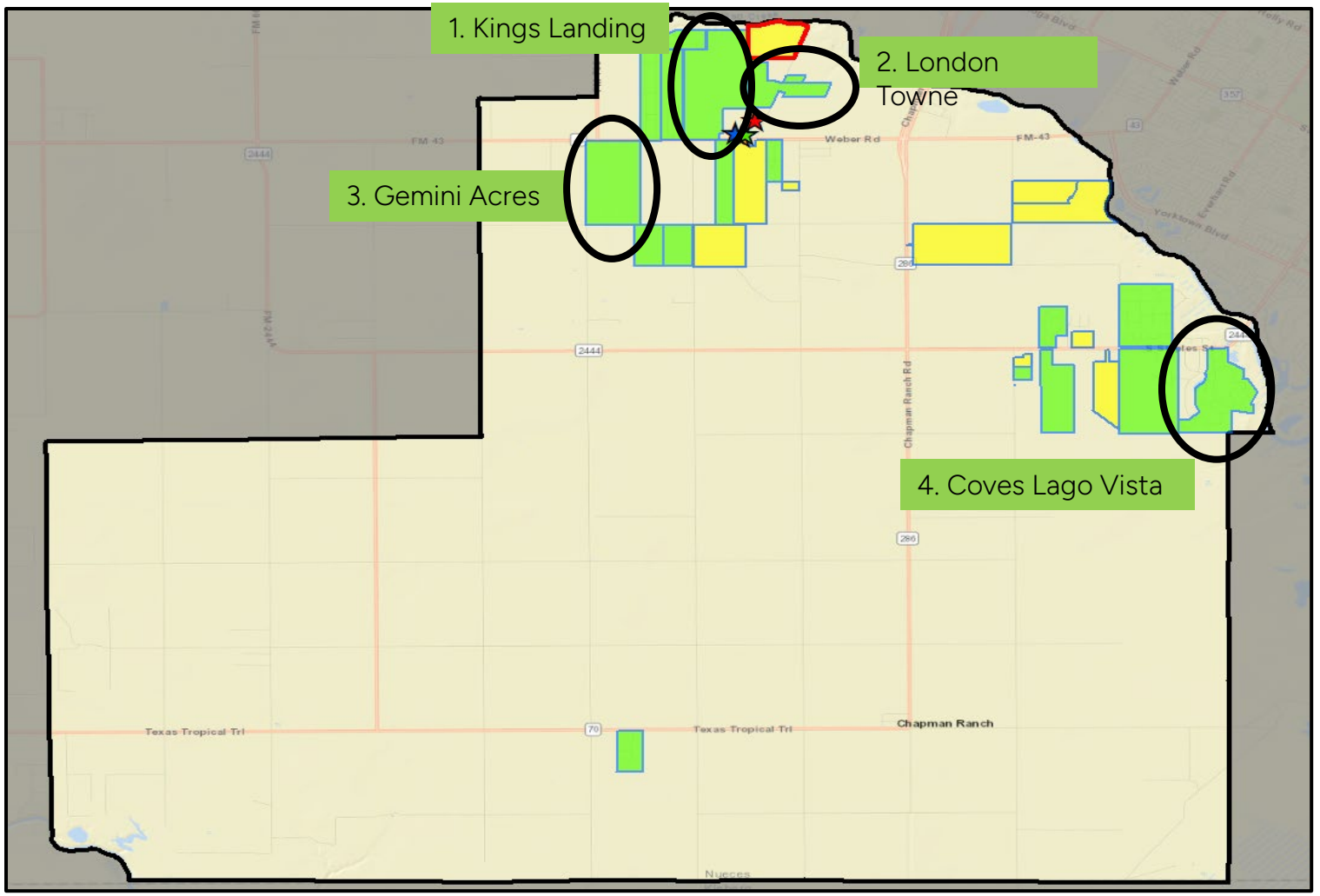
- ACTIVE
- FUTURE
- Groundwork Underway

The following pages highlight major and new developments

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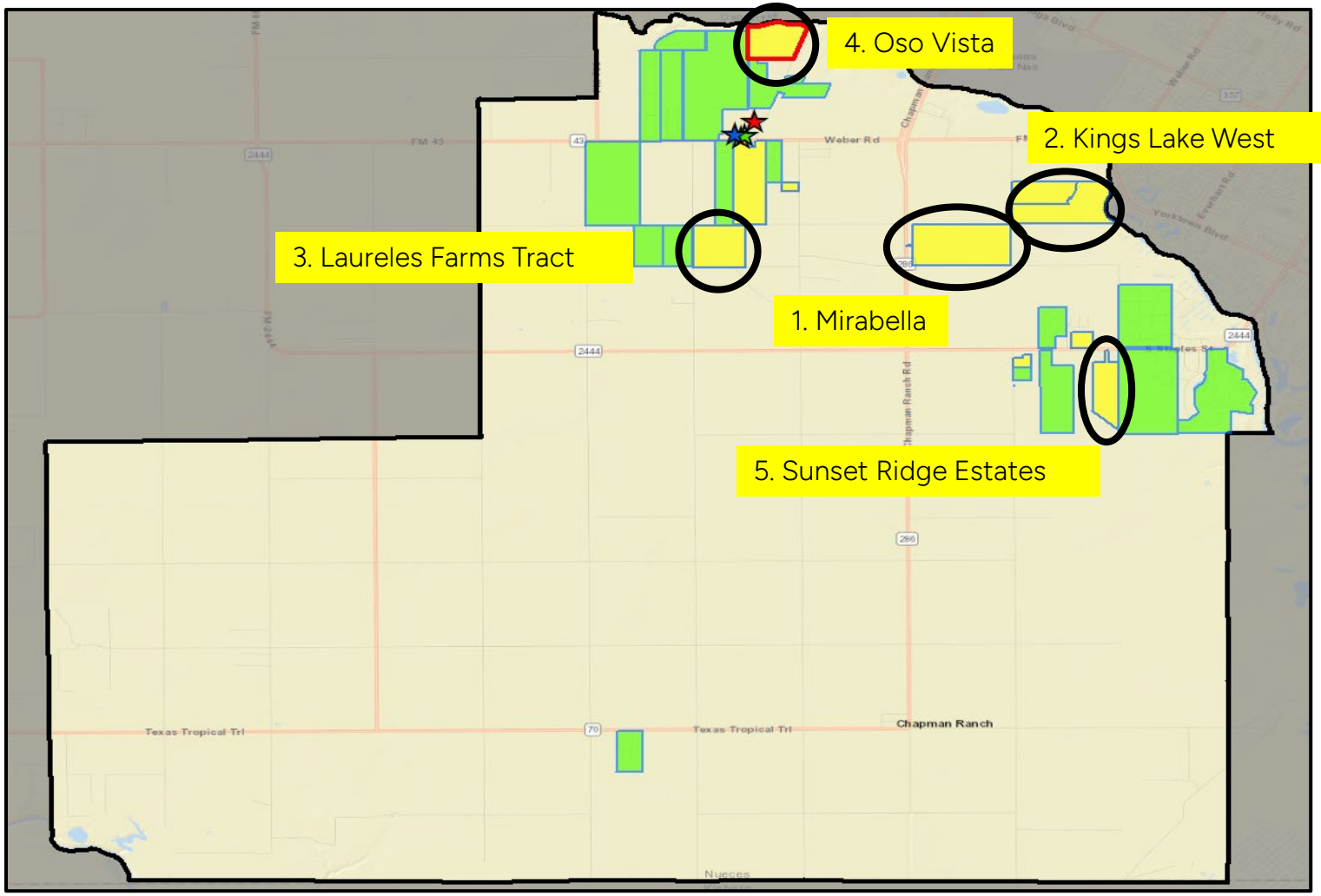


Largest Active Subdivisions

1. **Kings Landing**
   - 1,445 total lots
   - 190 lots ready for building
   - 40% completed
2. **London Towne**
   - 600 total lots
   - 85 lots ready for building
   - 84% completed
3. **Gemini Acres**
   - 400 total lots
   - 33 lots ready for building
   - 10% completed
4. **Coves Lago Vista**
   - 290 total lots
   - 18 lots ready for building
   - 93% completed

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London ISD - Future Housing Overview



Largest Future Subdivisions

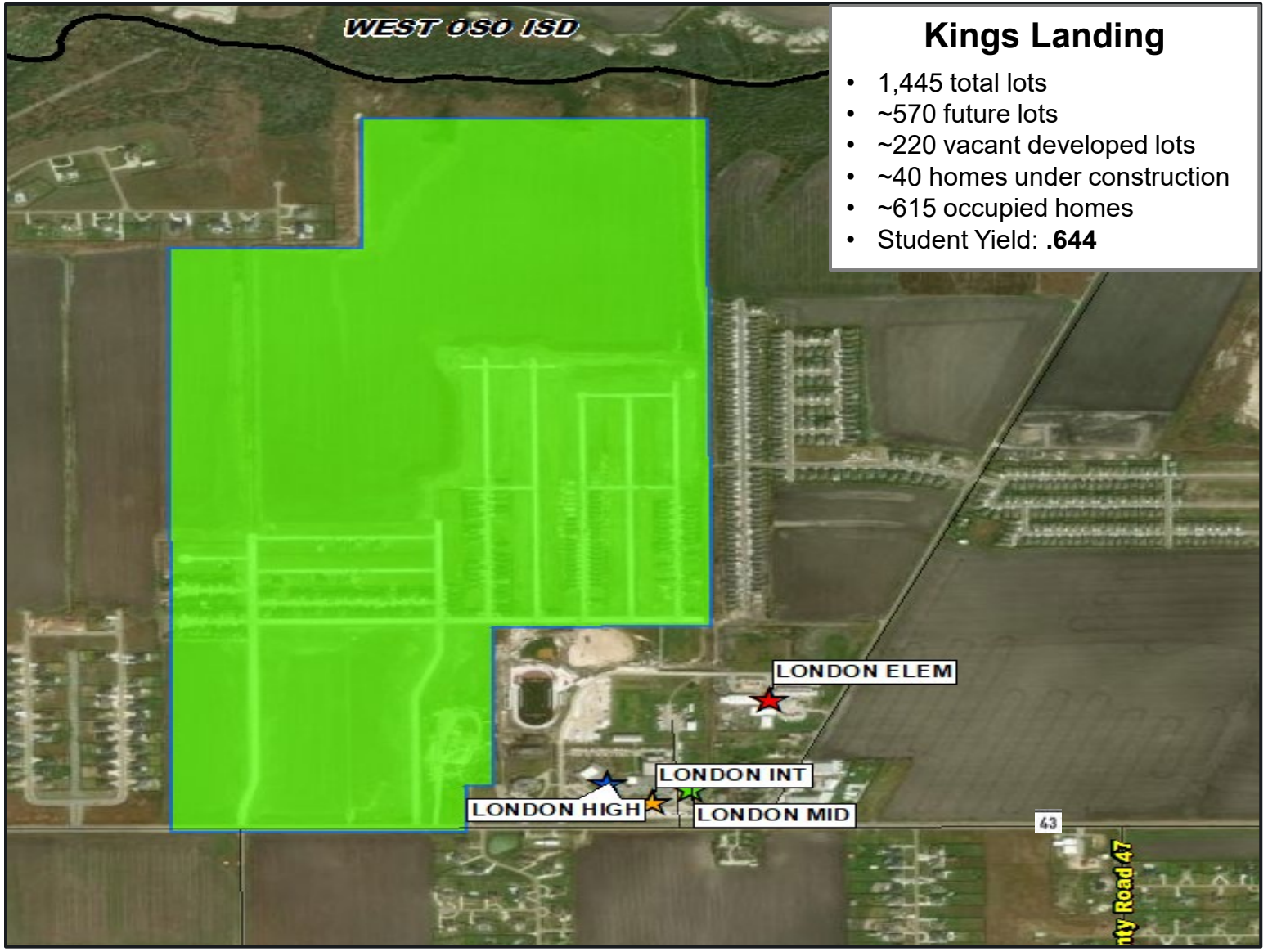
1. **Mirabella**
   - 1,222 total lots
2. **Kings Lake West**
   - 520 total lots
3. **Laureles Farms Tract**
   - 350 total lots
4. **Oso Vista**
   - 269 total lots
5. **Sunset Ridge Estates**
   - 157 total lots

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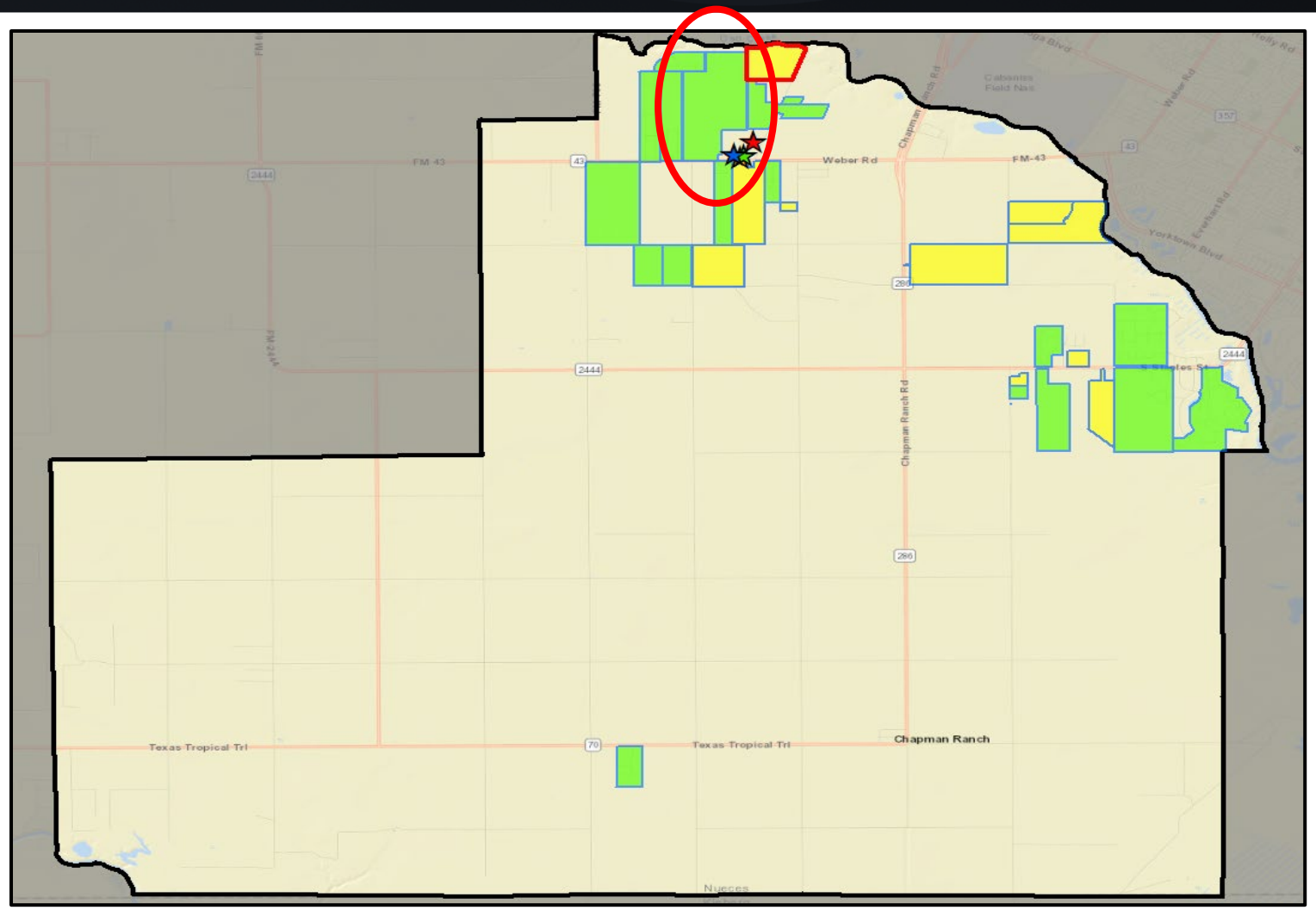


Kings Landing

- 1,445 total lots
- ~570 future lots
- ~220 vacant developed lots
- ~40 homes under construction
- ~615 occupied homes
- Student Yield: **.644**

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London ISD - Future Housing Overview



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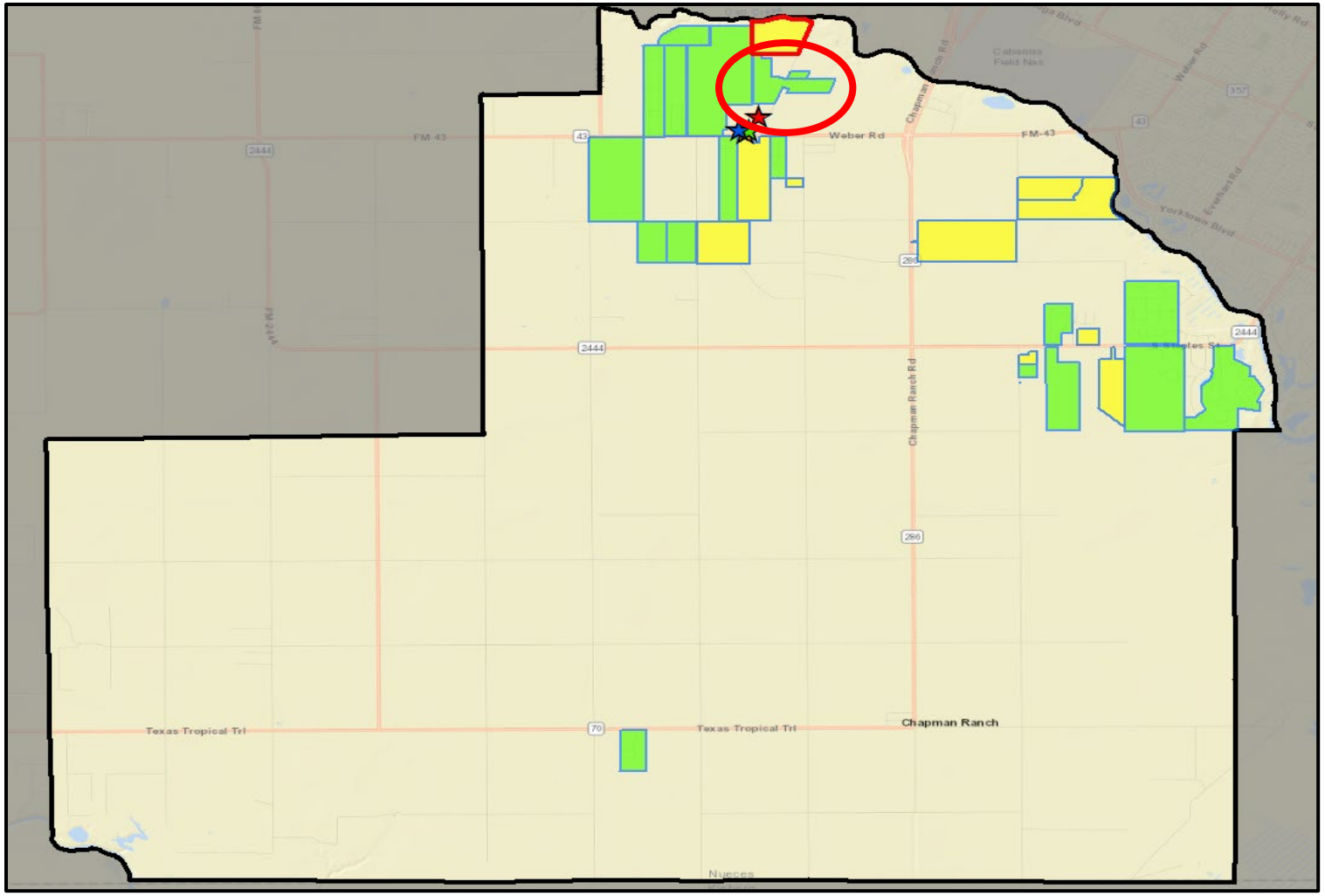
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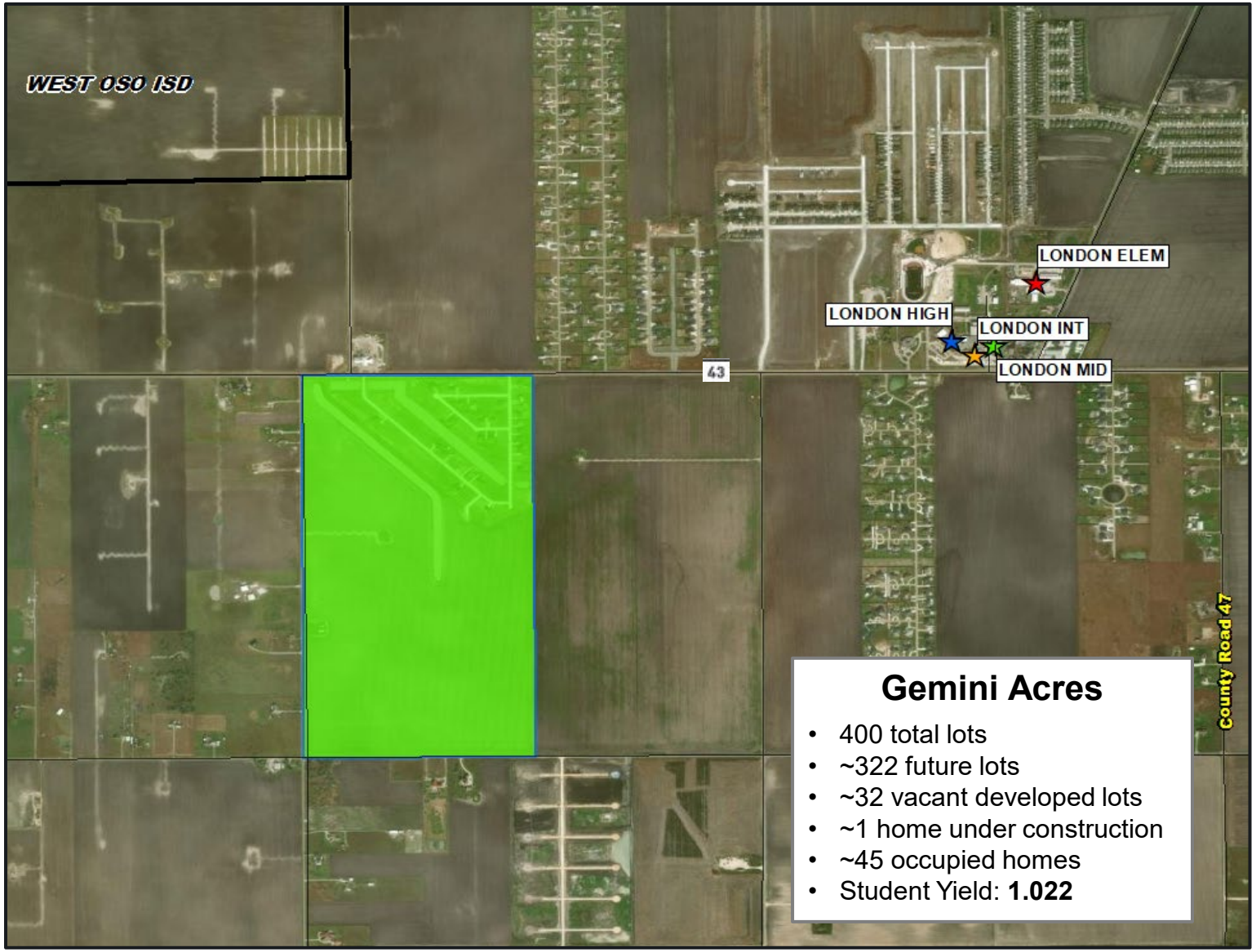


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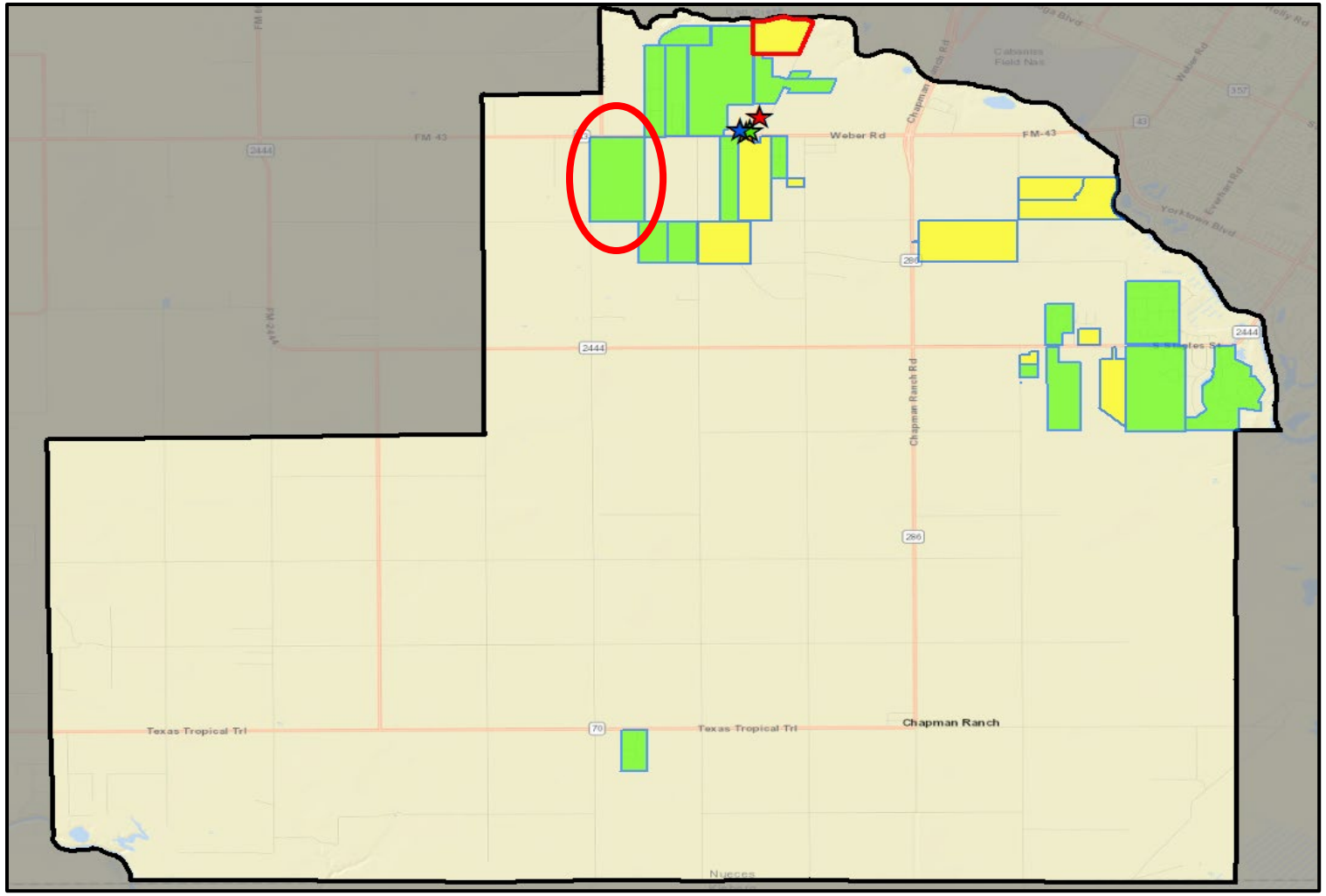
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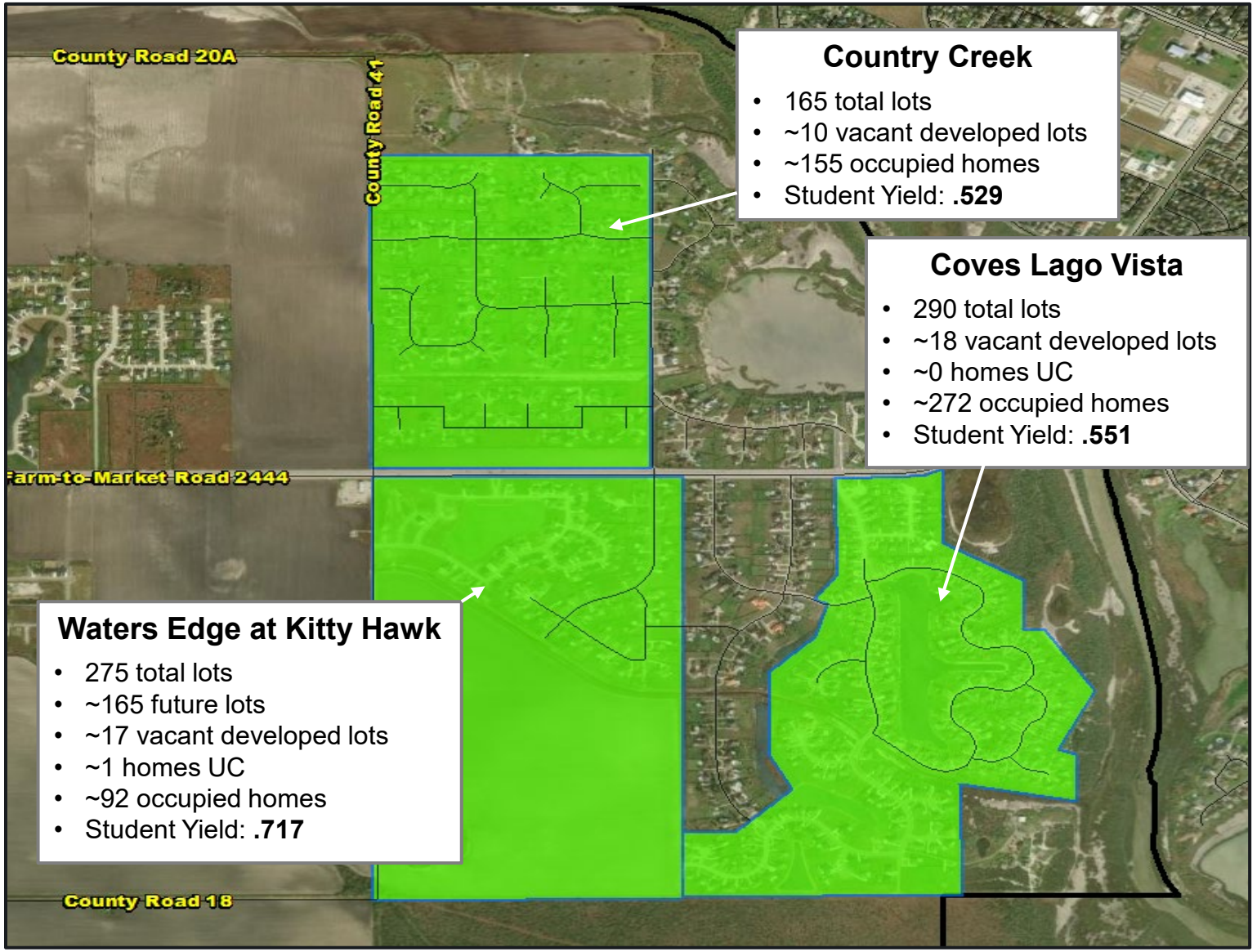


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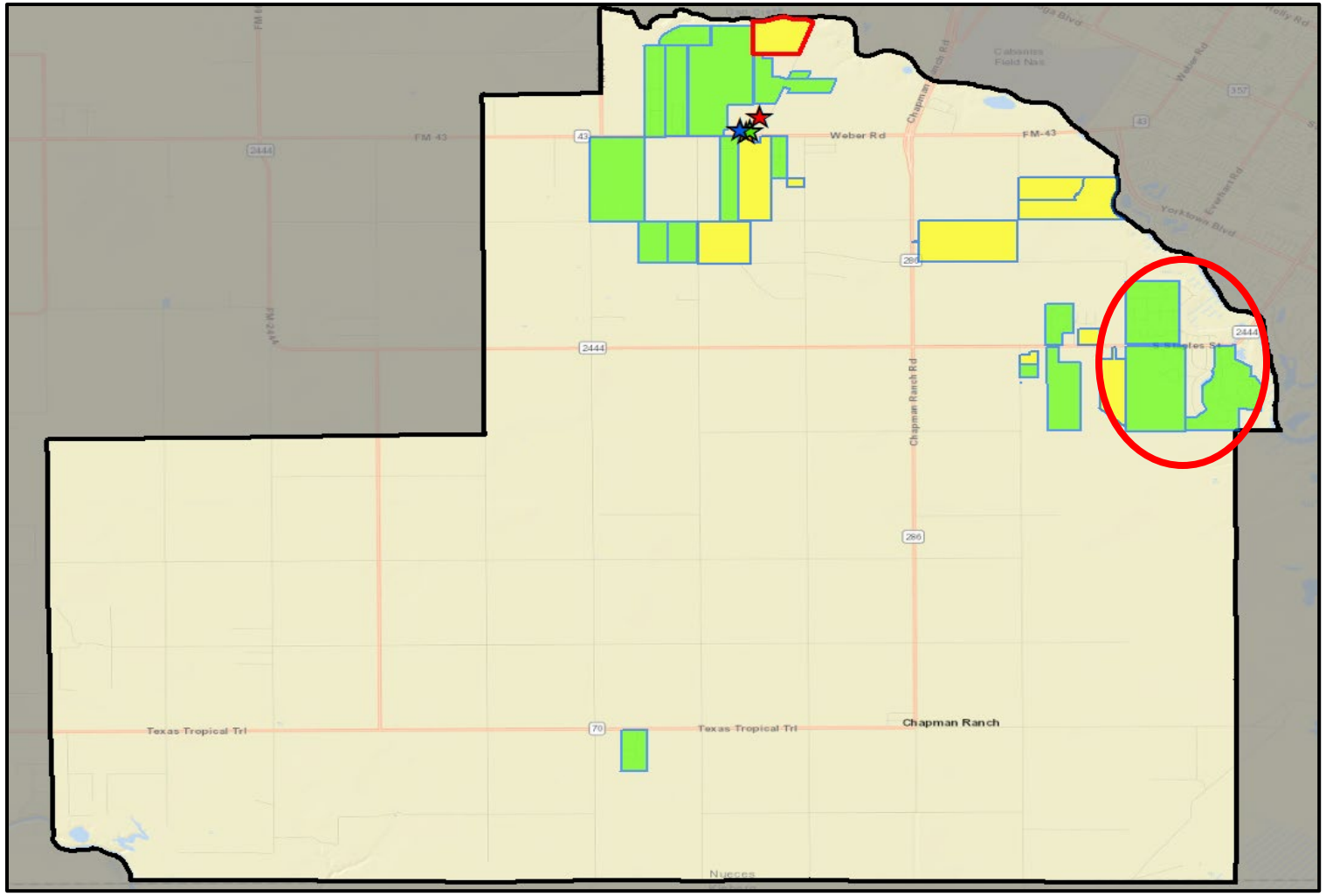
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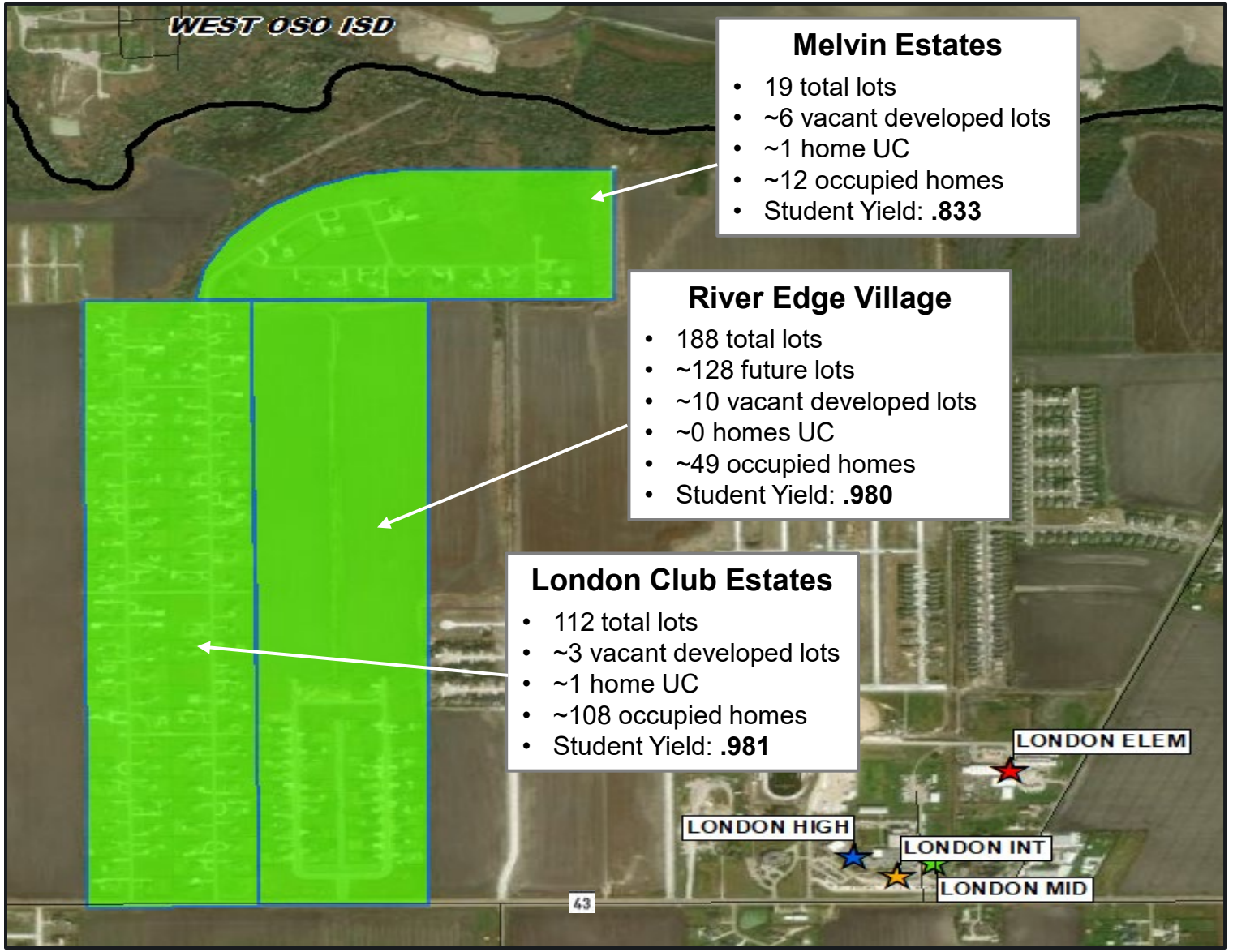


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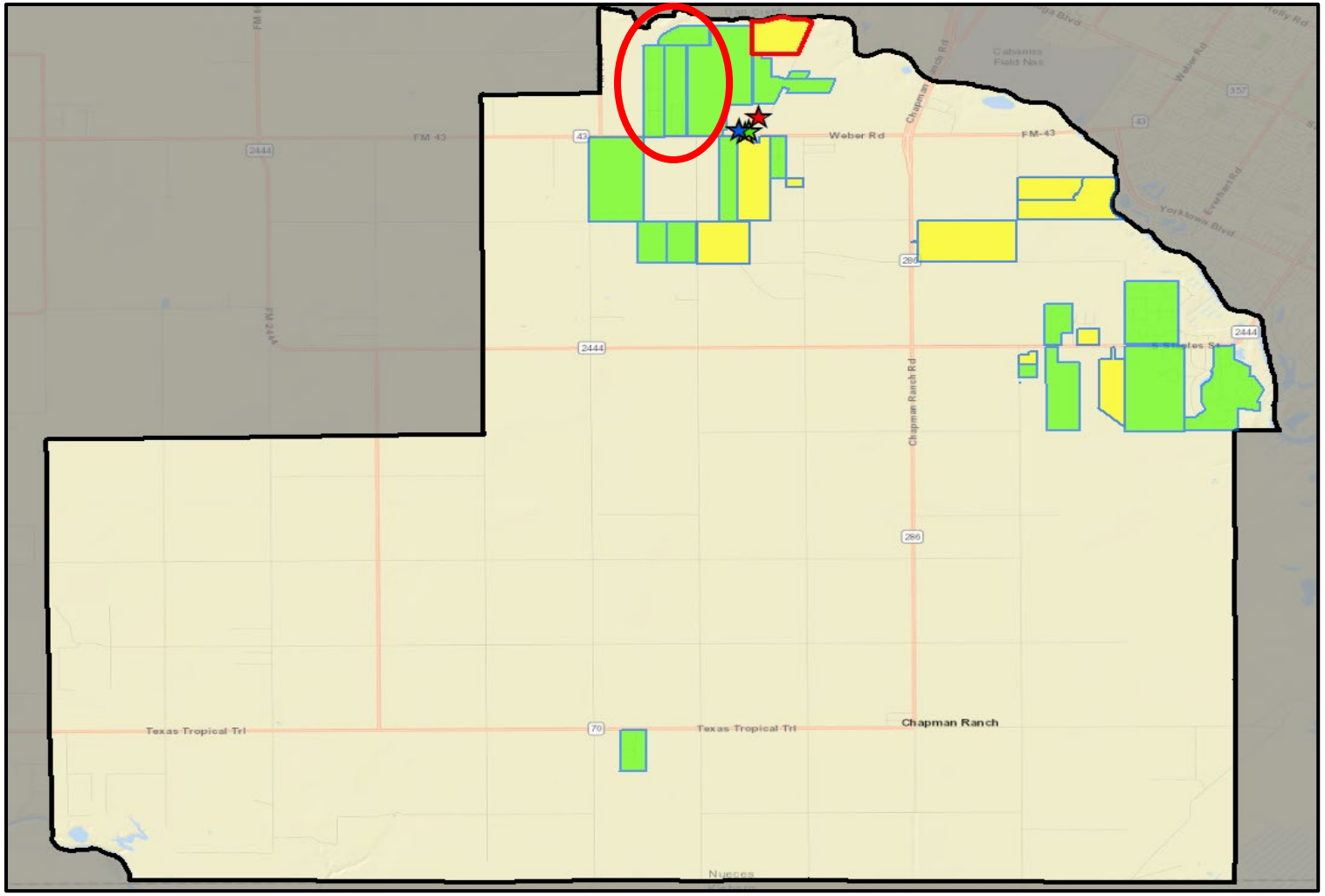
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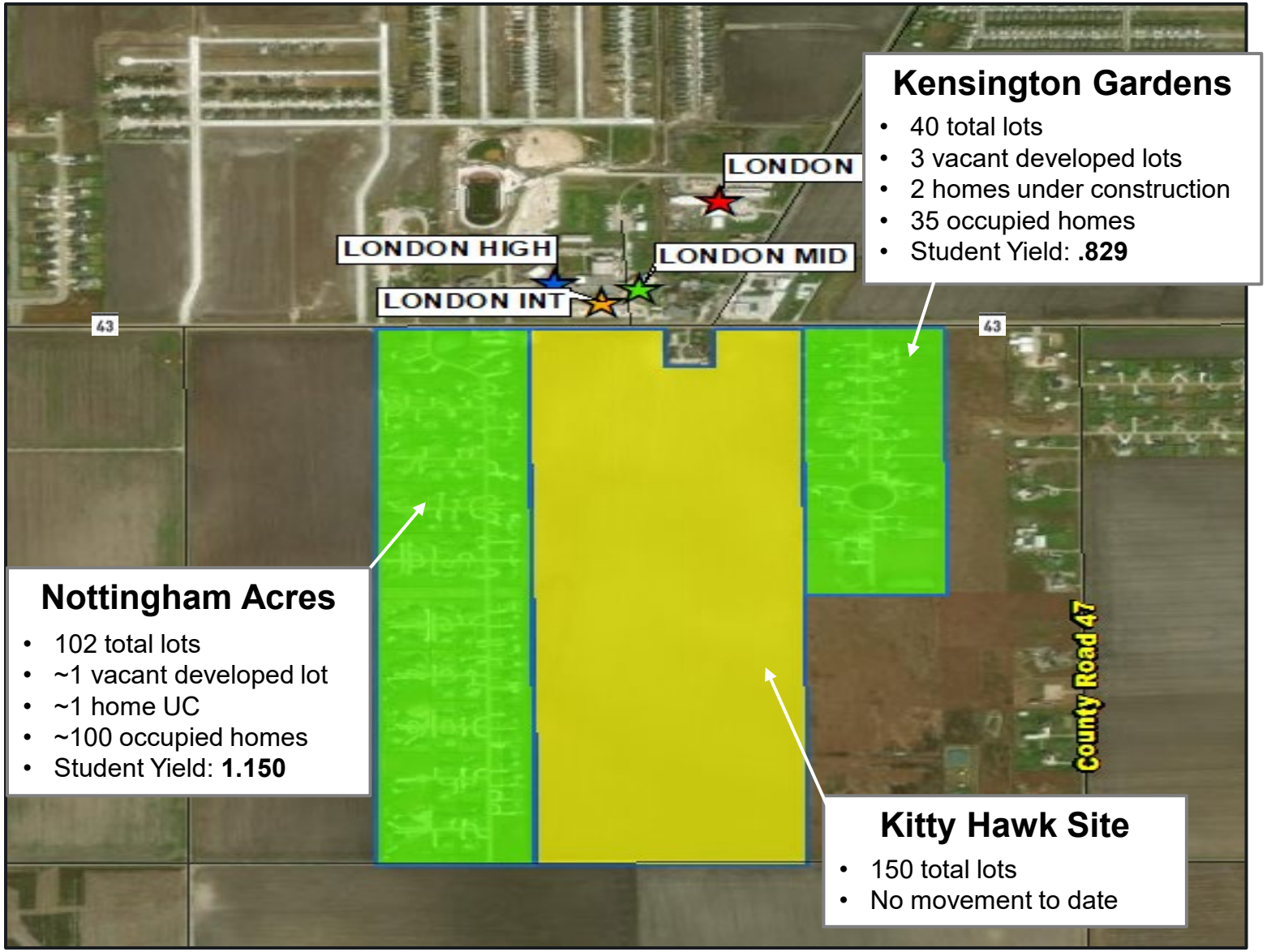


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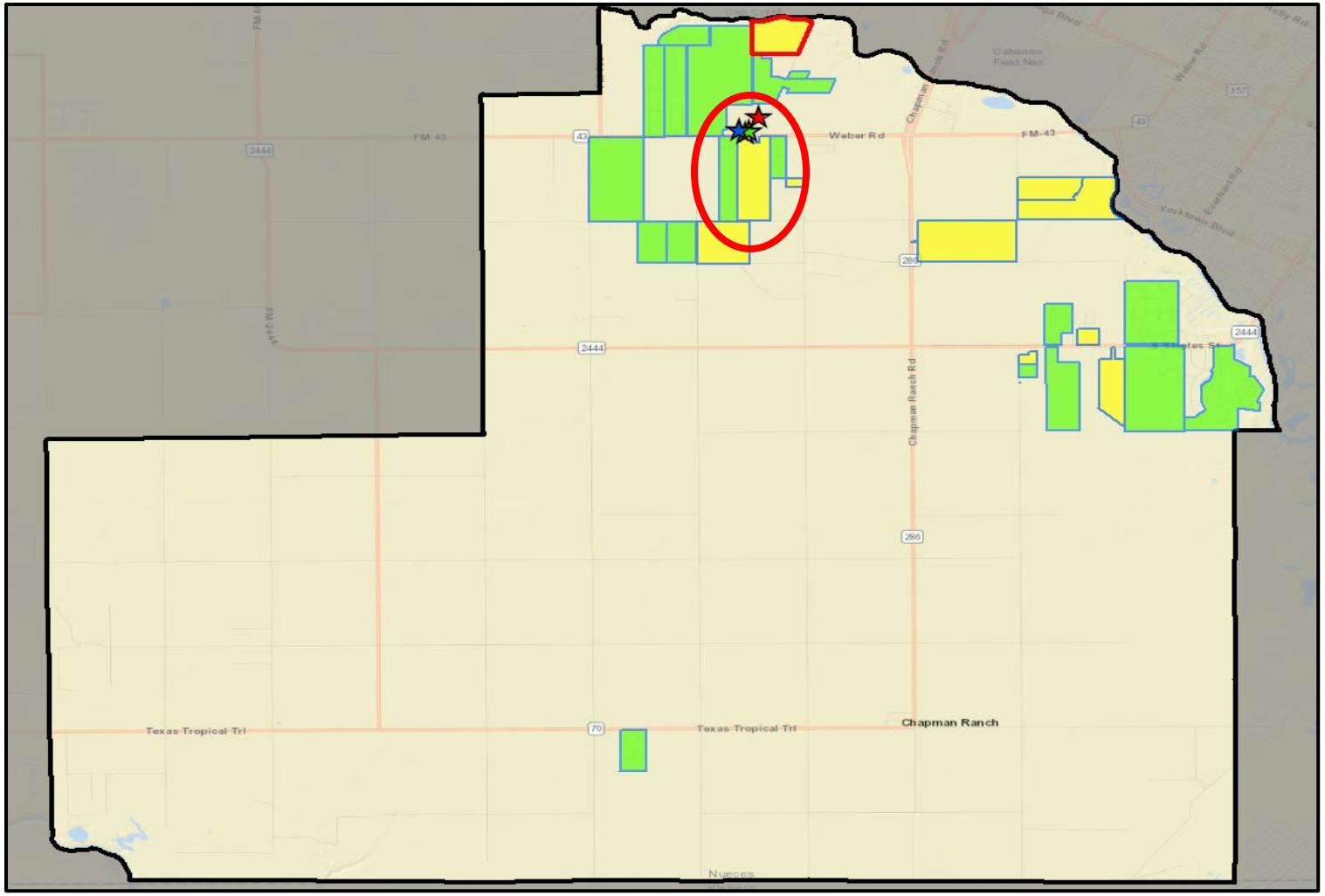
Kensington Gardens
- 40 total lots
- 3 vacant developed lots
- 2 homes under construction
- 35 occupied homes
- Student Yield: **.829**

Nottingham Acres
- 102 total lots
- ~1 vacant developed lot
- ~1 home UC
- ~100 occupied homes
- Student Yield: **1.150**

Kitty Hawk Site
- 150 total lots
- No movement to date

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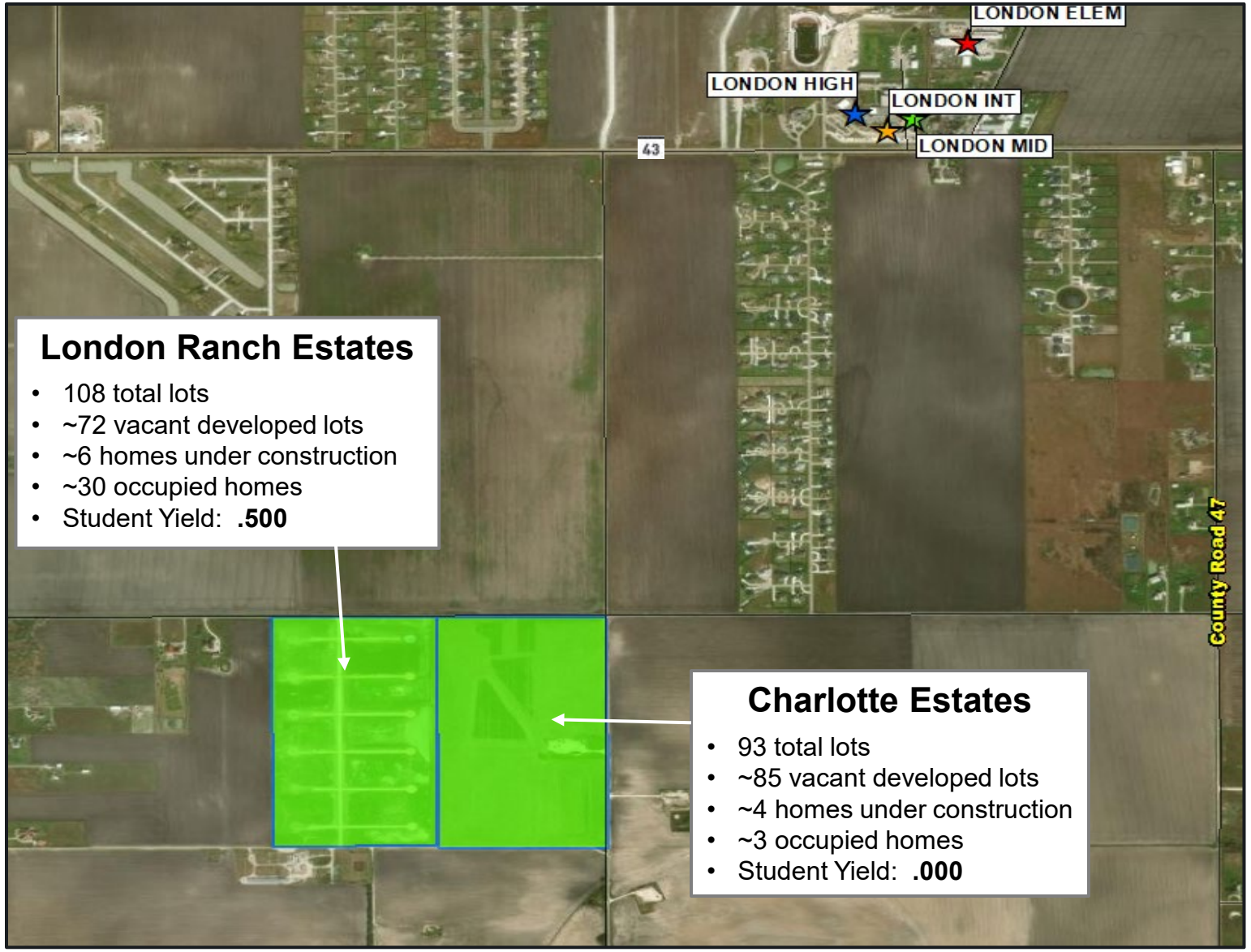


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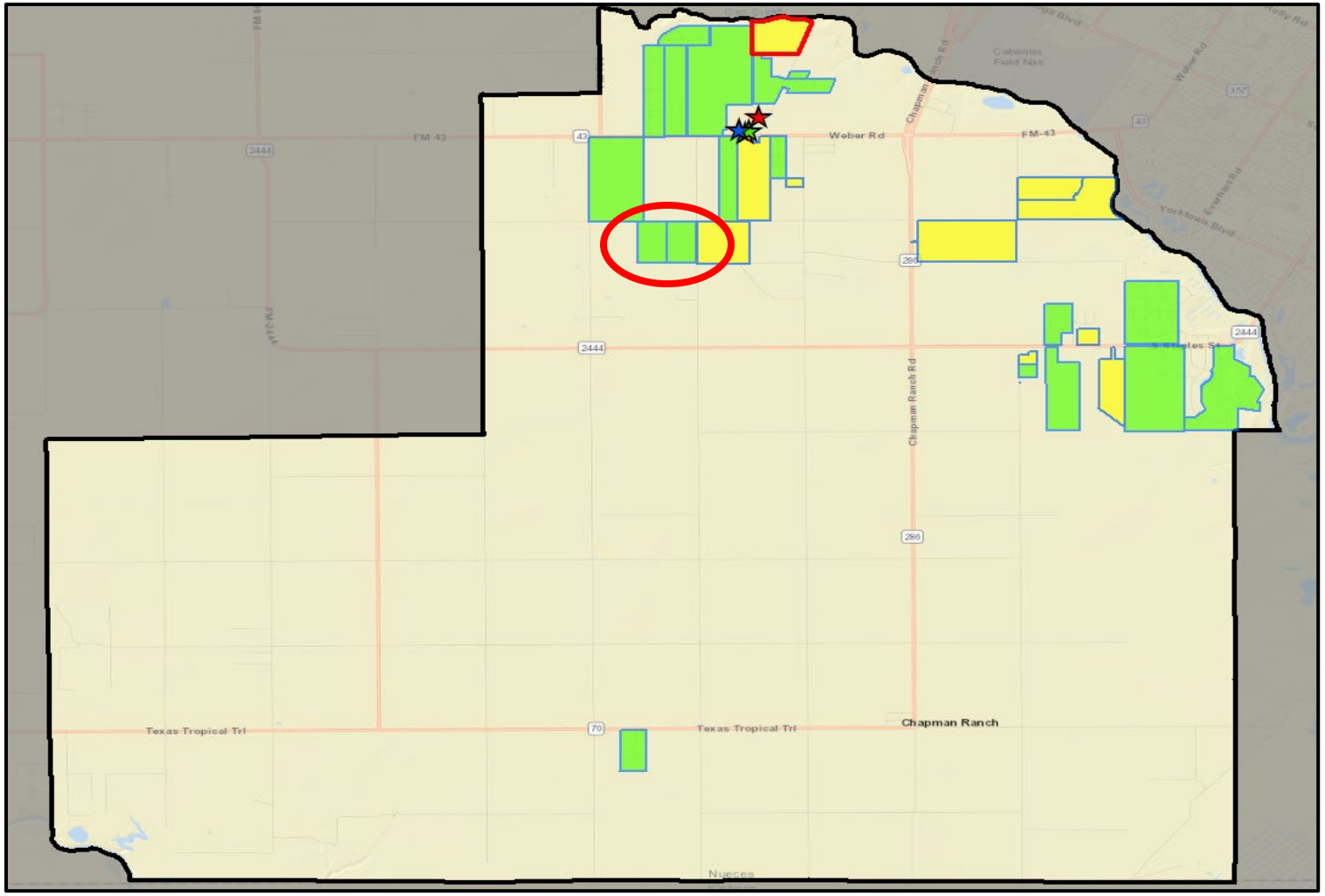
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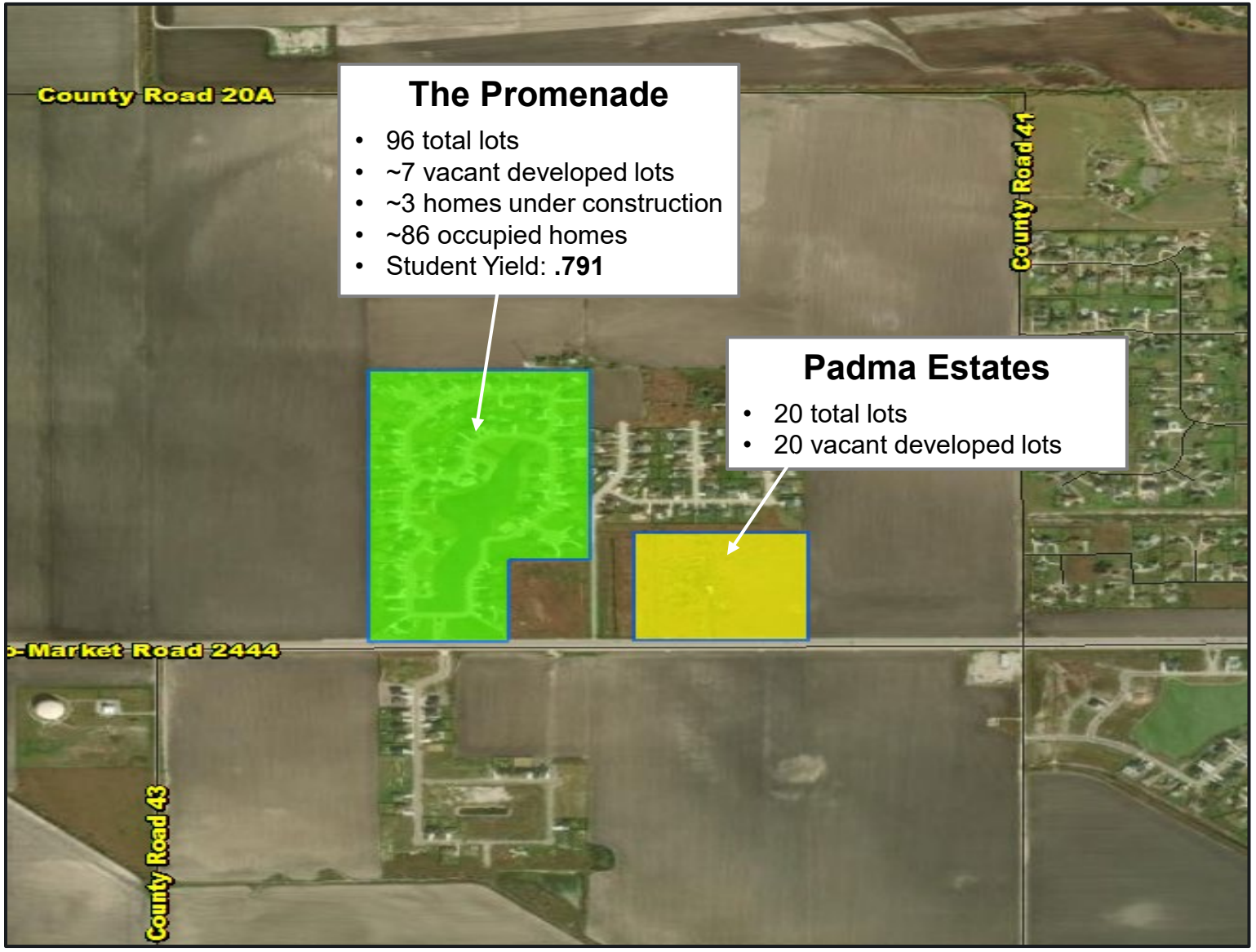


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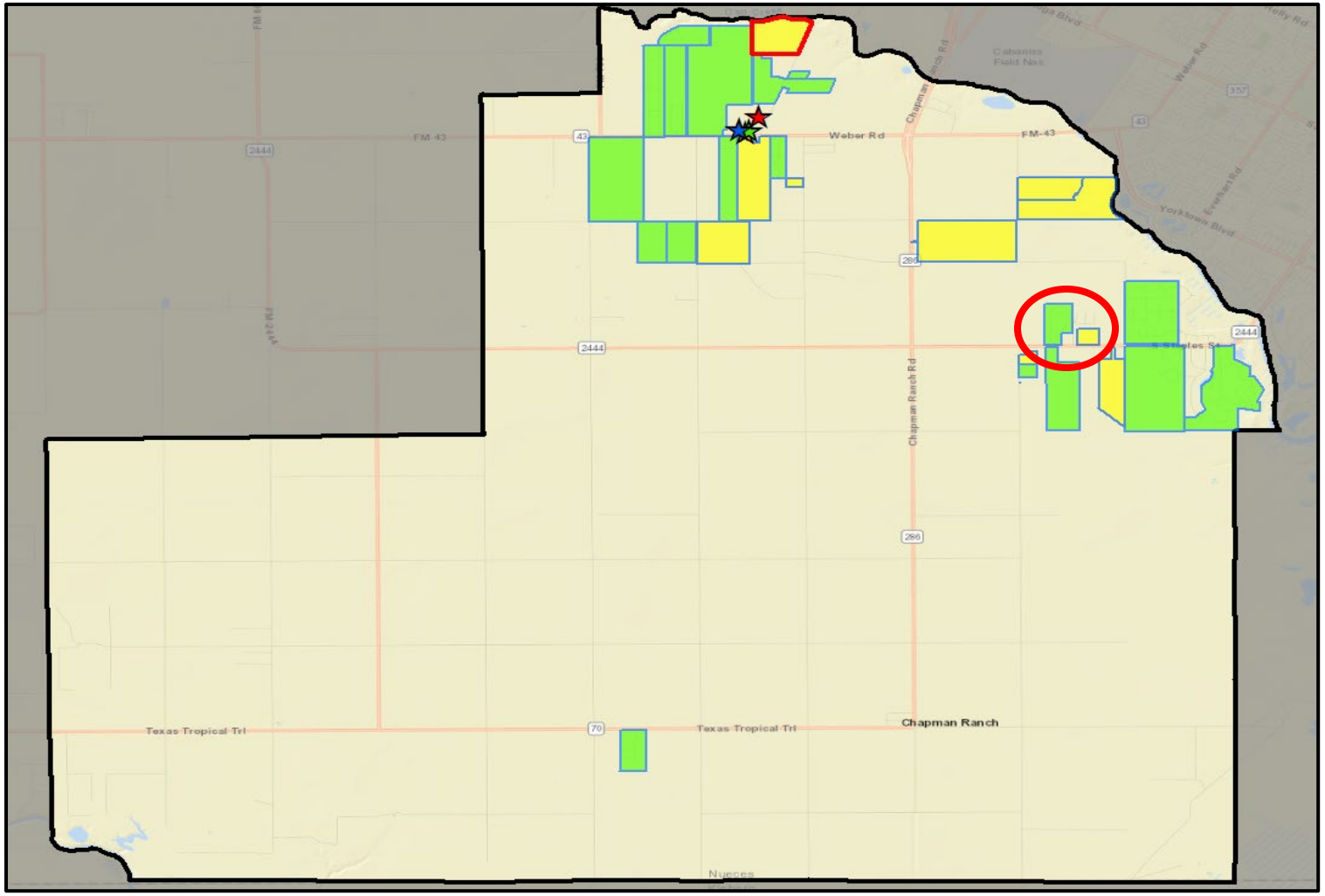
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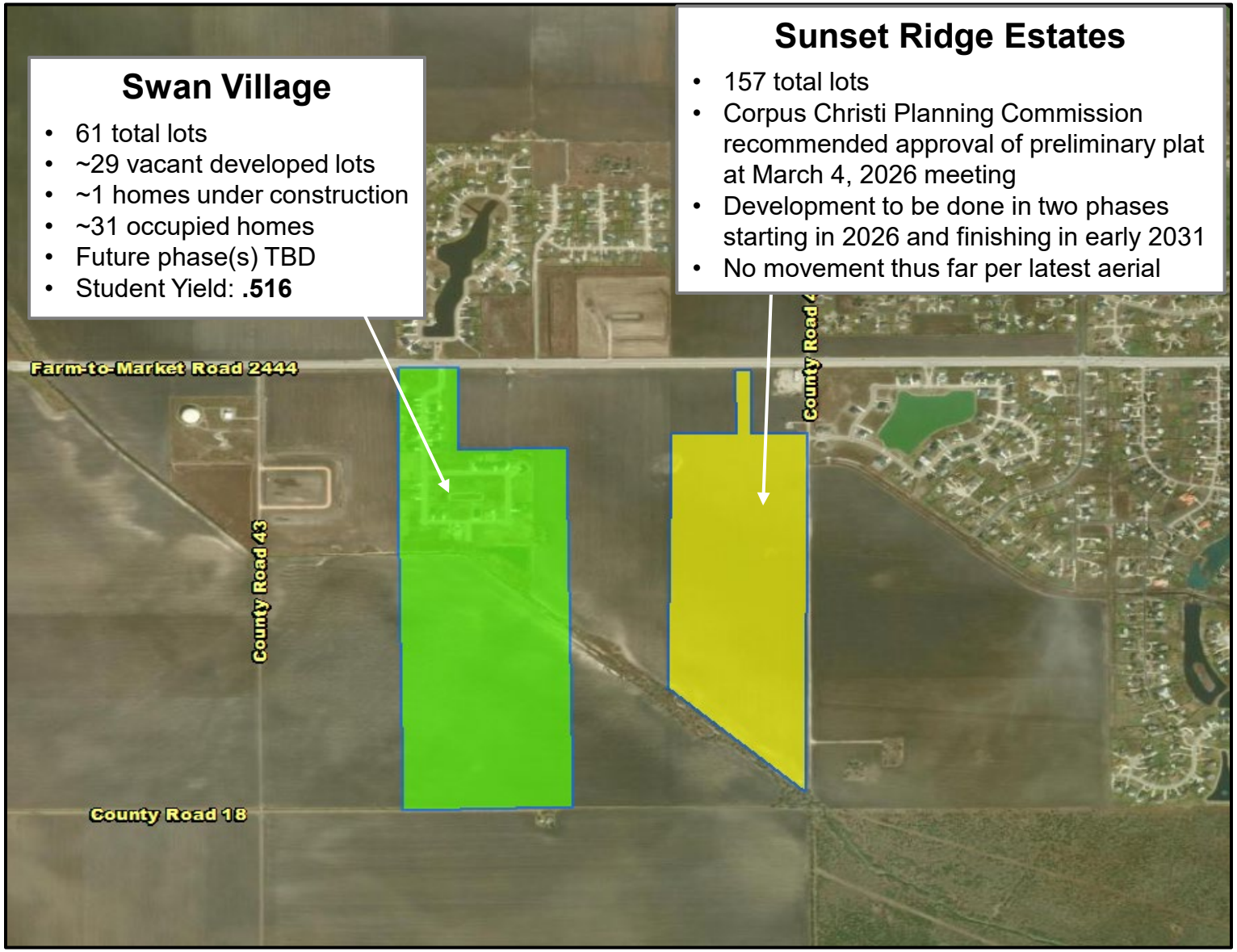


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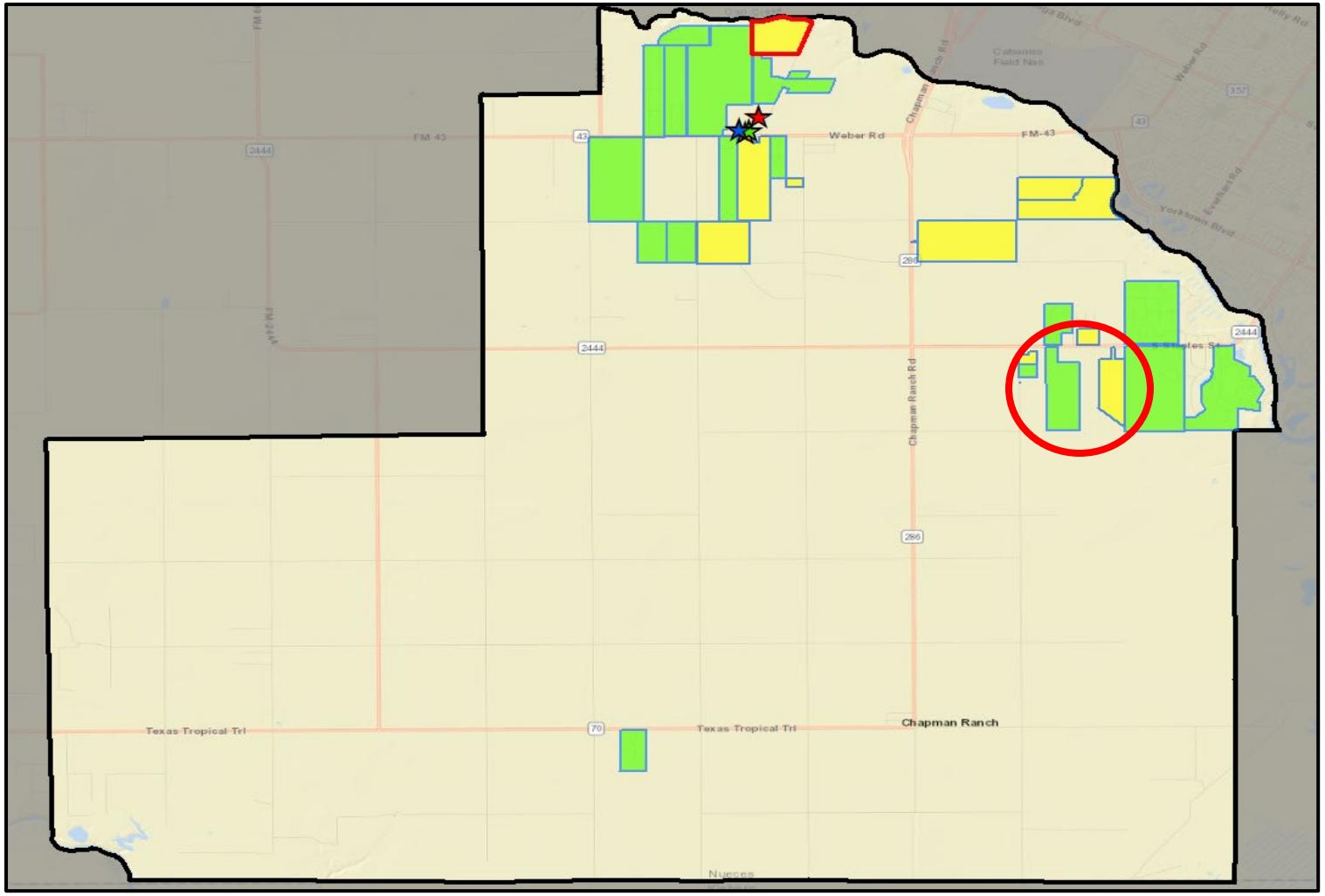
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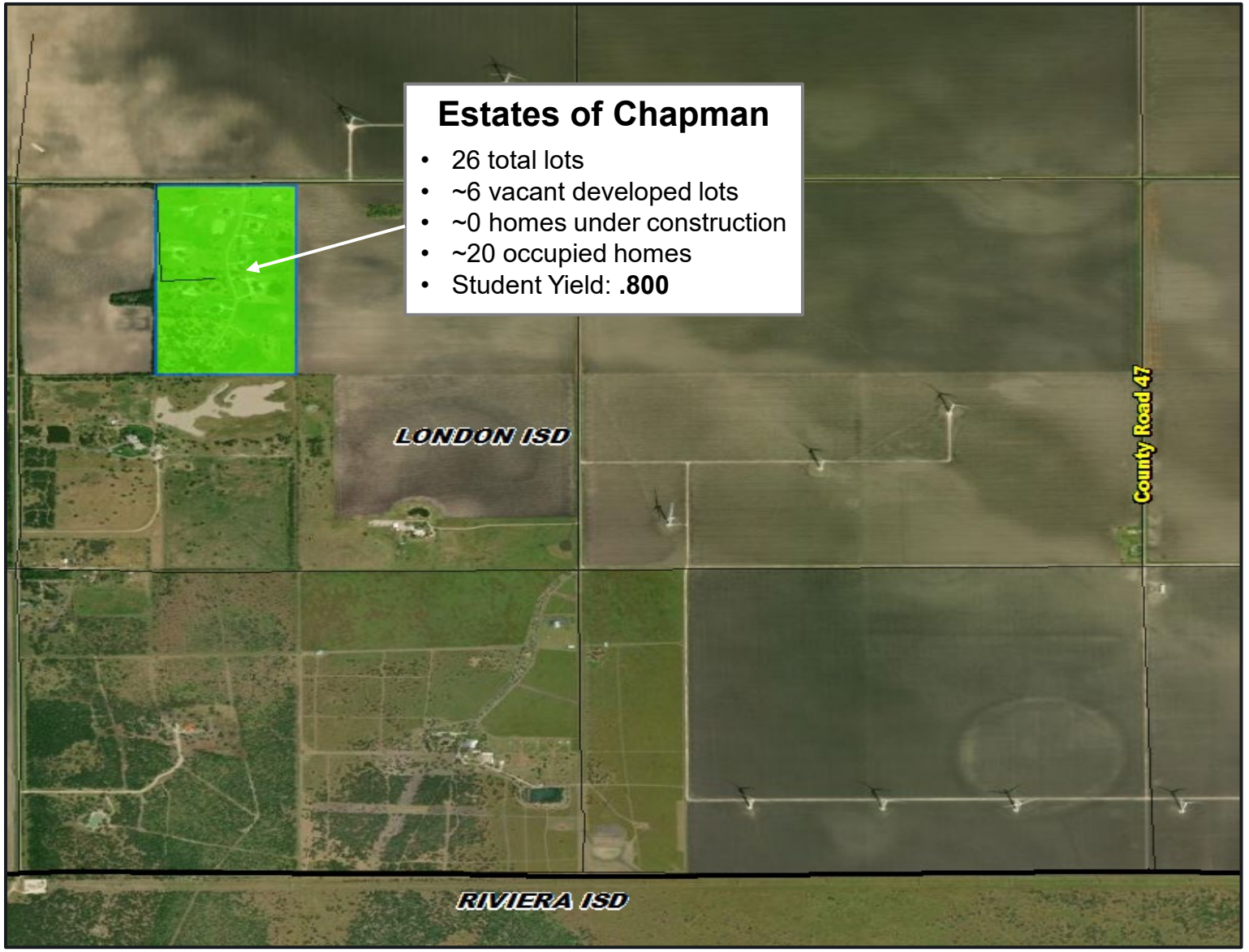


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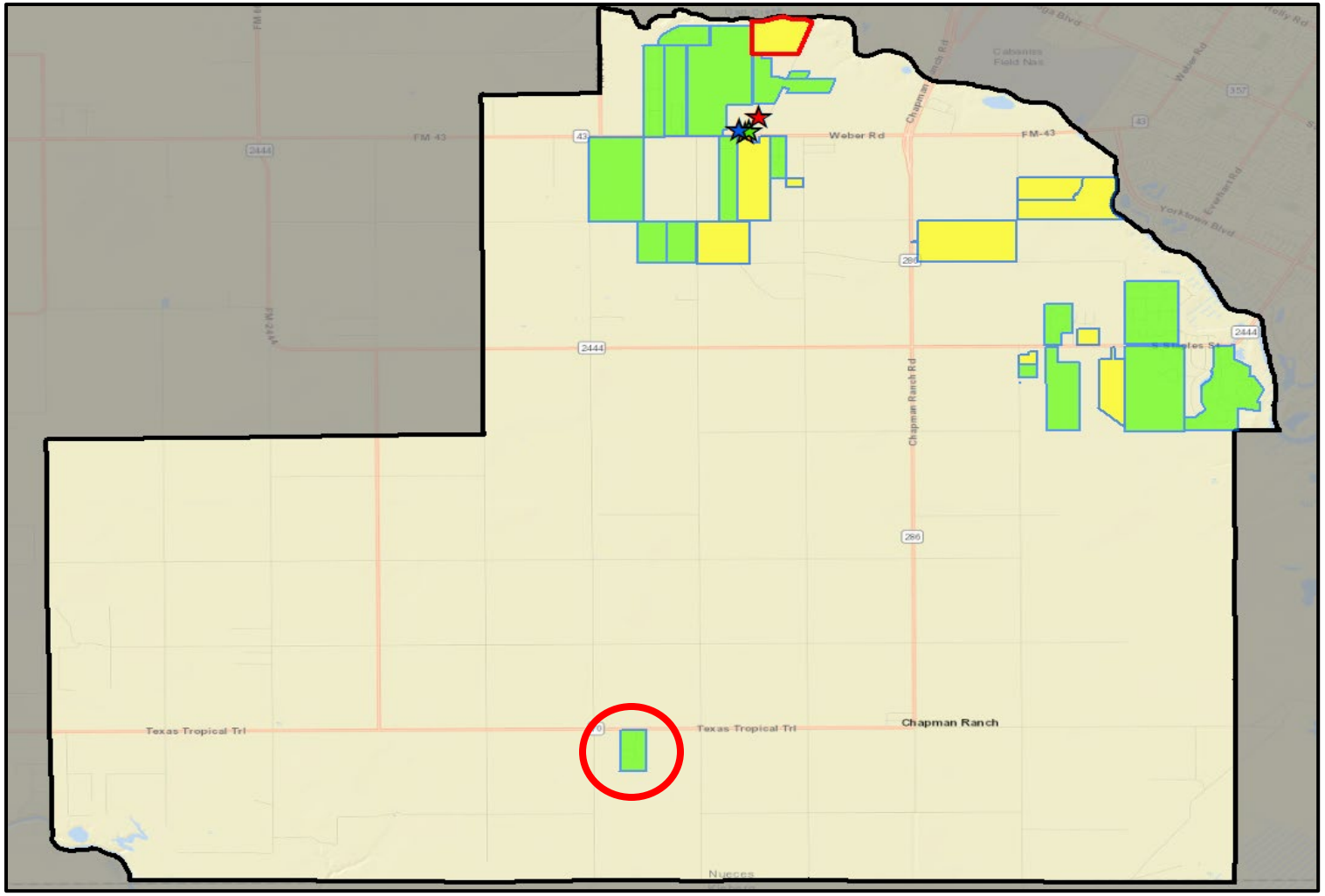
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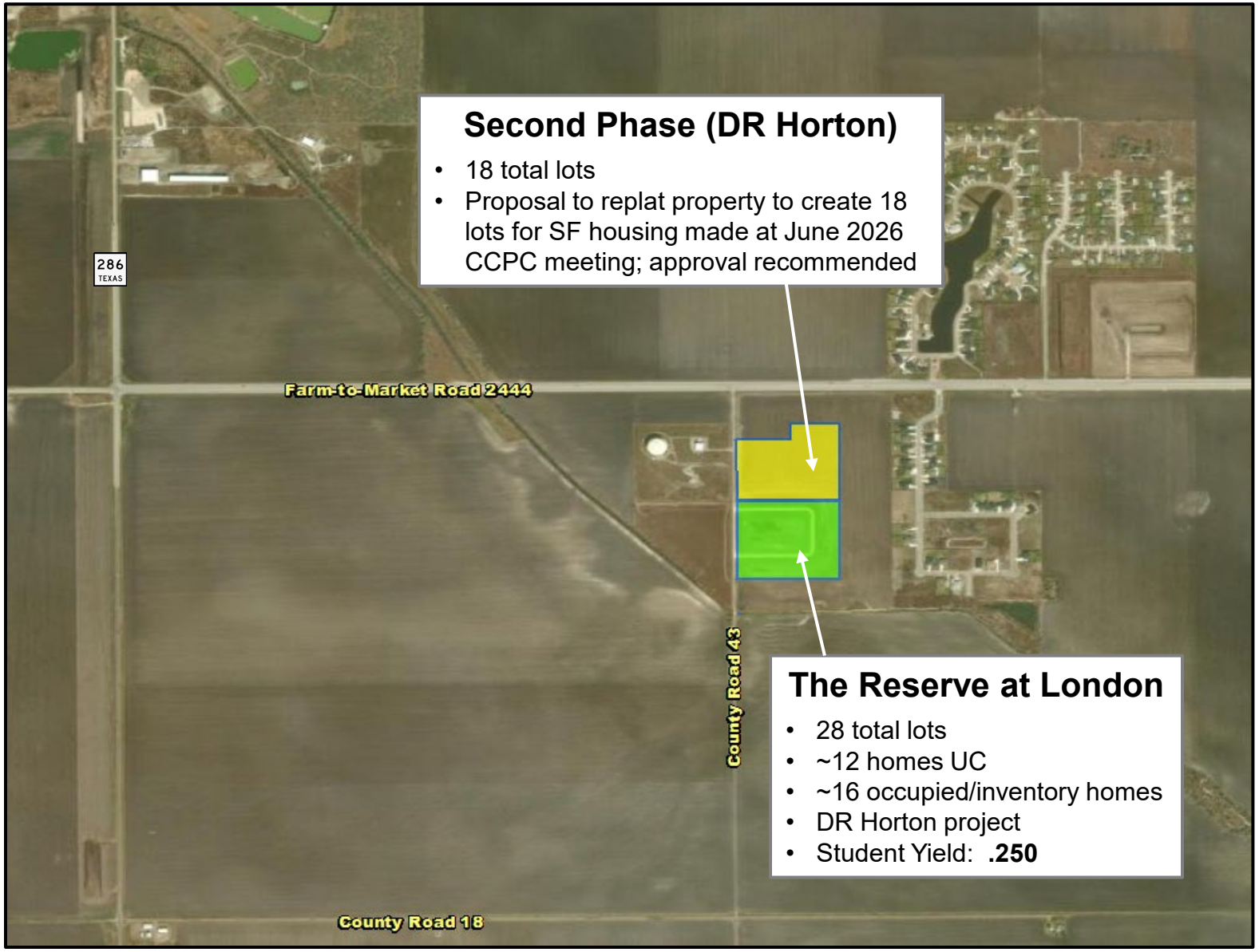


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Second Phase (DR Horton)

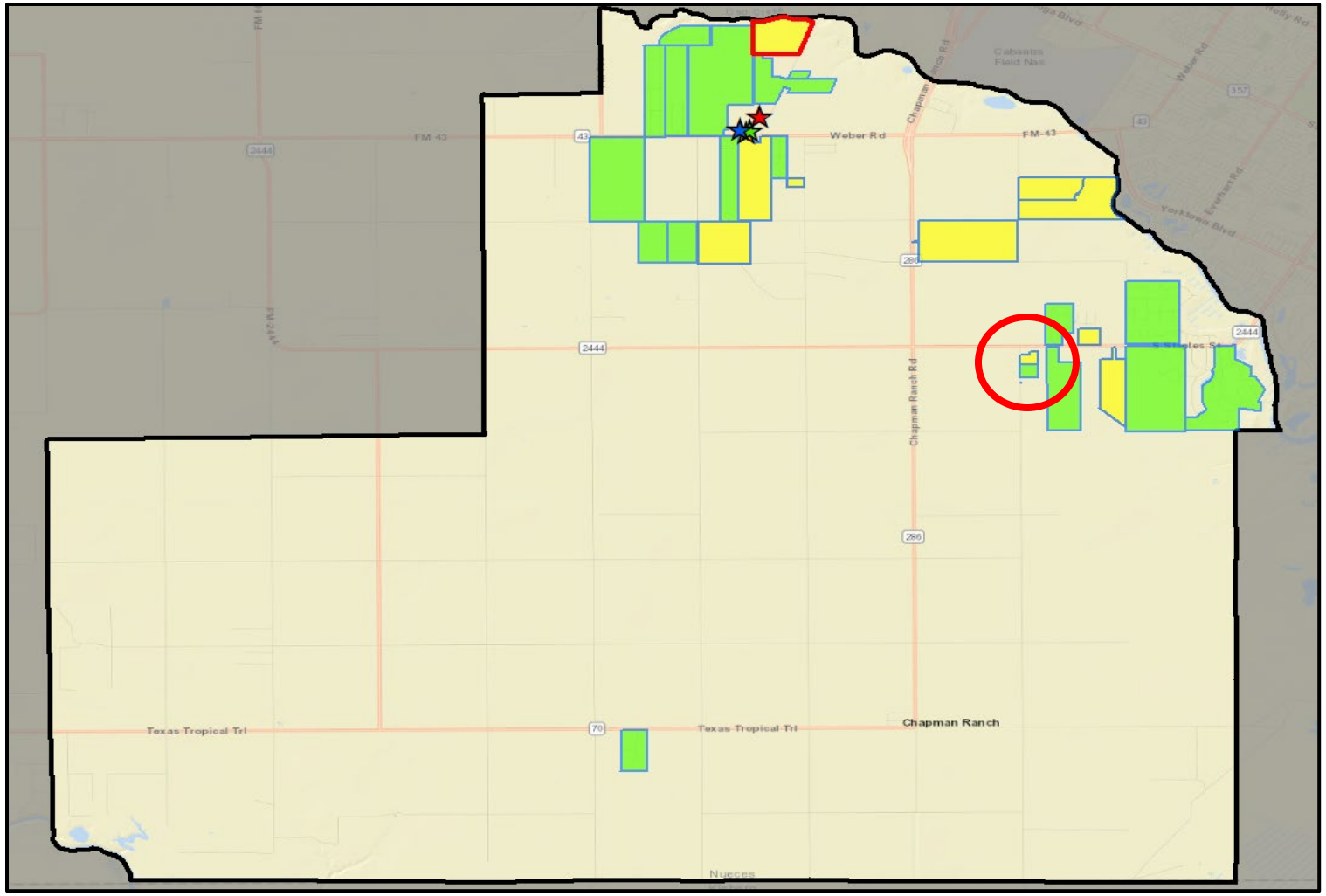
- 18 total lots
- Proposal to replat property to create 18 lots for SF housing made at June 2026 CCPC meeting; approval recommended

The Reserve at London

- 28 total lots
- ~12 homes UC
- ~16 occupied/inventory homes
- DR Horton project
- Student Yield: **.250**

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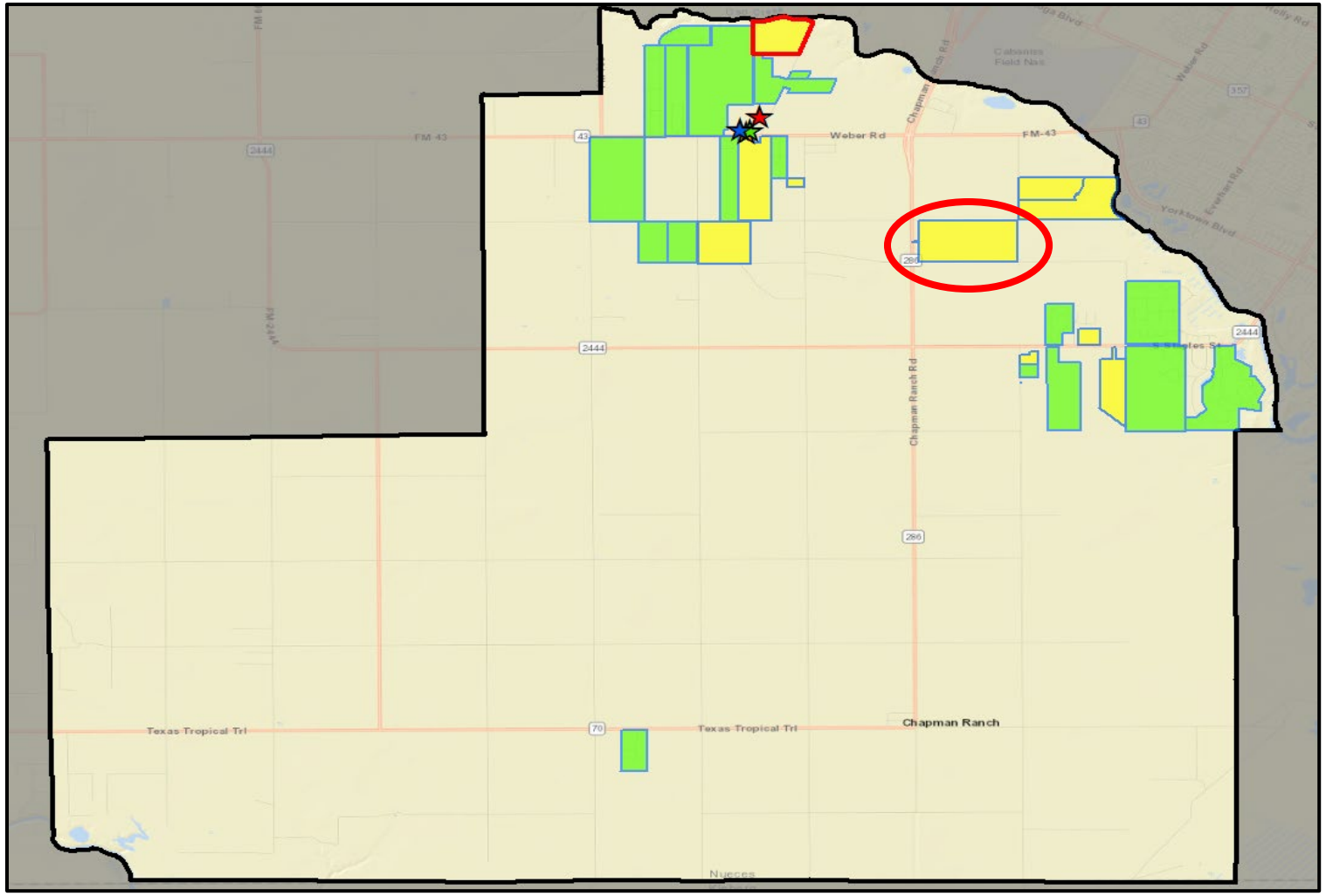


Mirabella

- 1,222 total lots
- Plats approved April 2024
- Plans call for multiple villages within the development
- Potential movement on north side of property along CR 22 per latest aerial (along with SH 286 widening construction)

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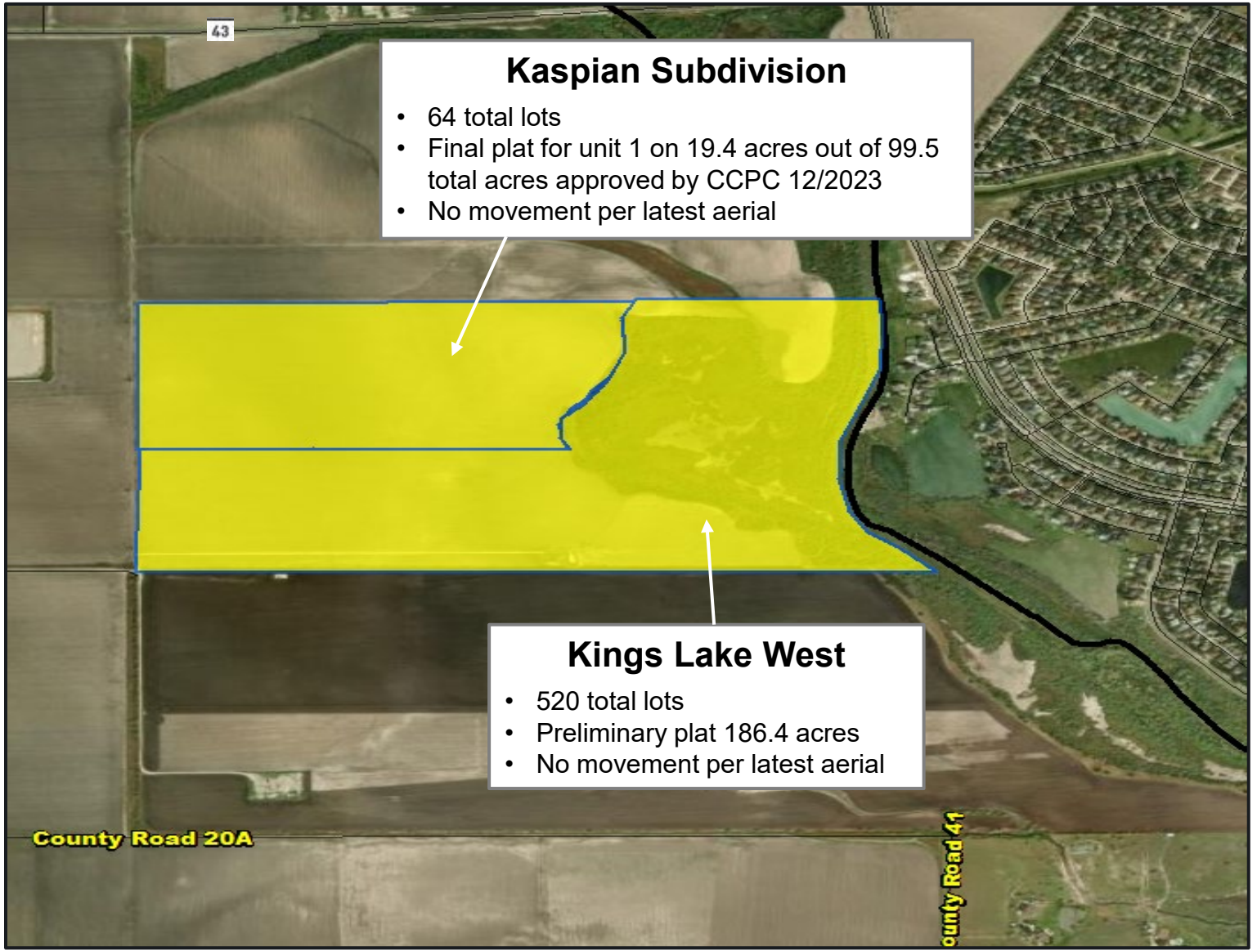


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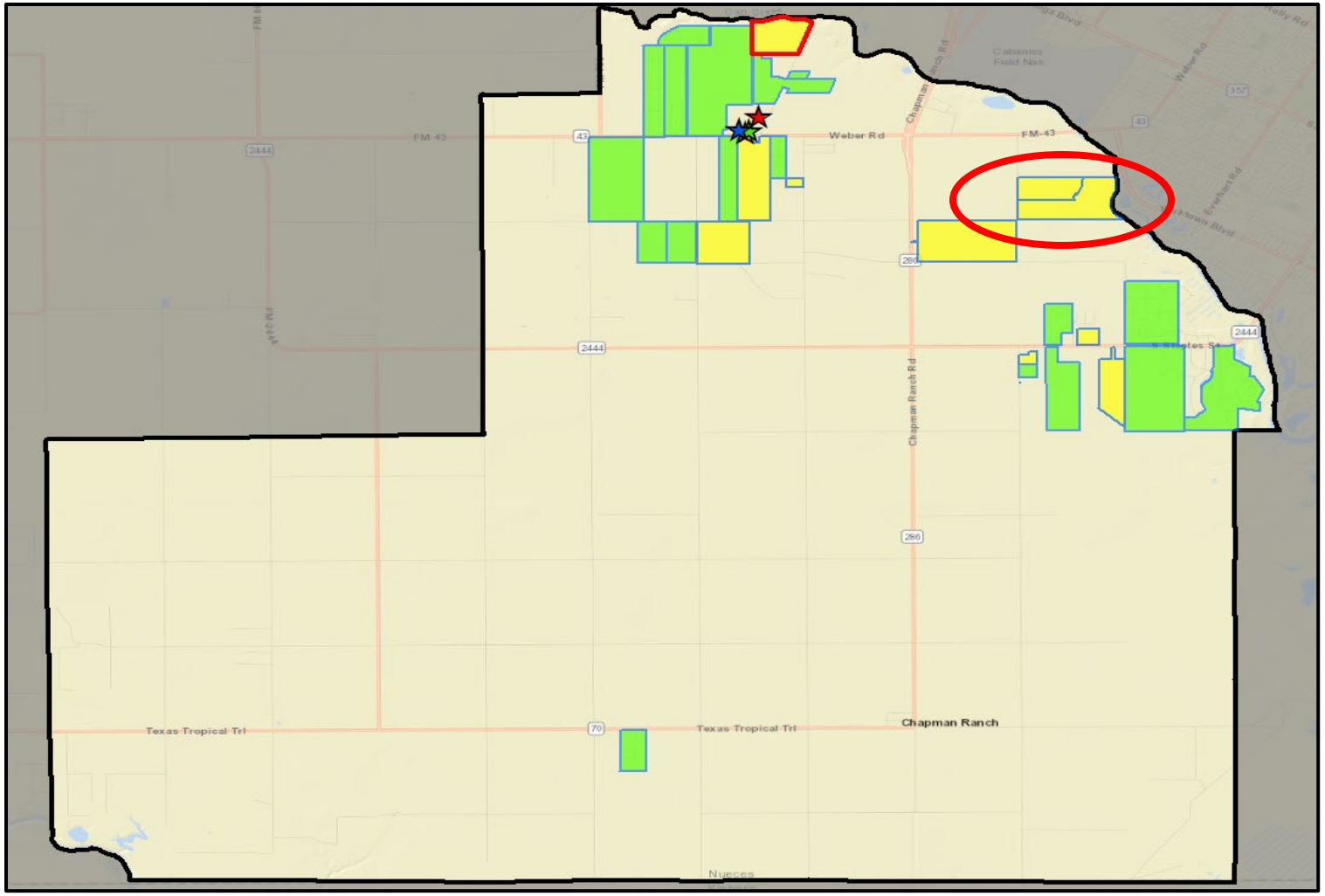
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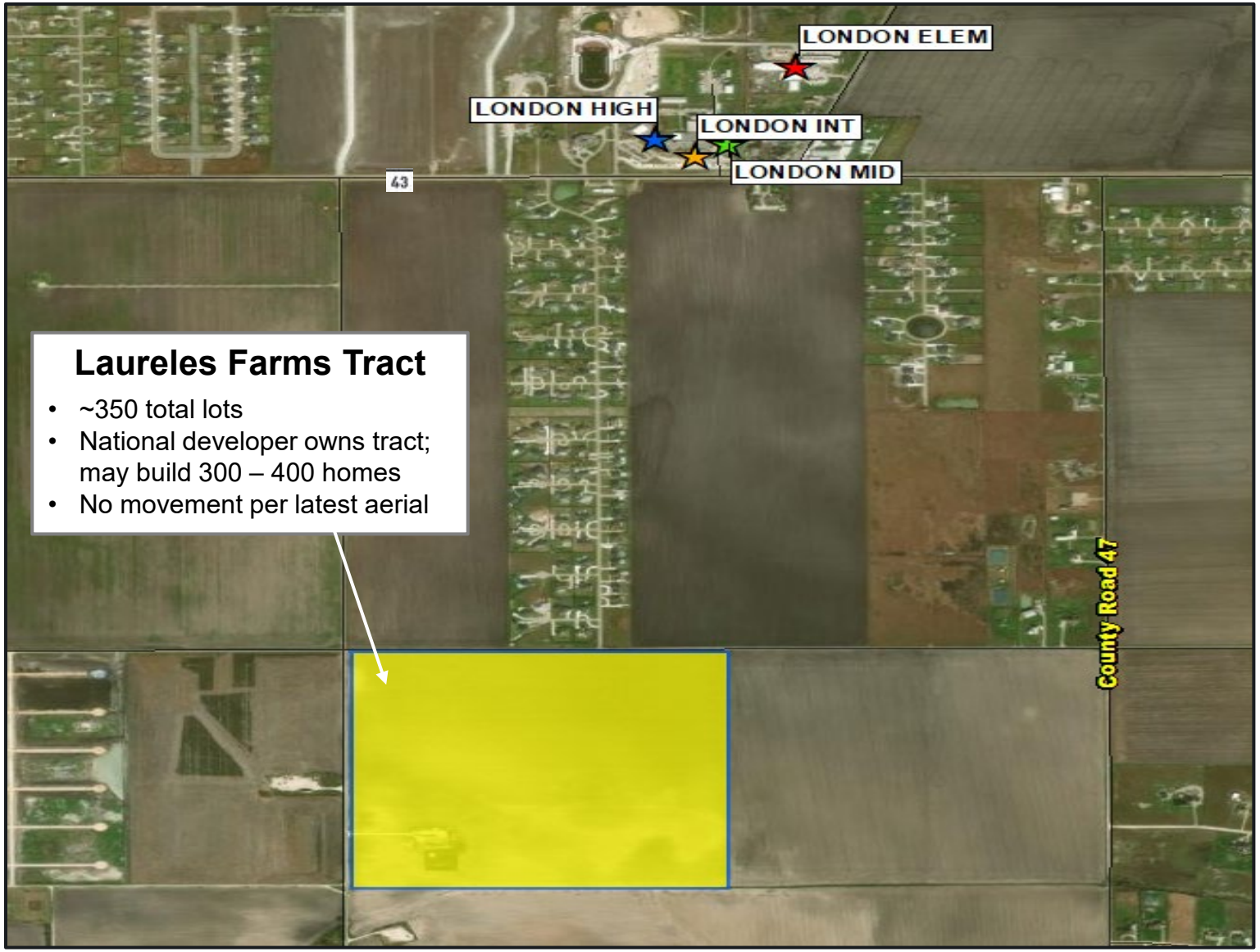


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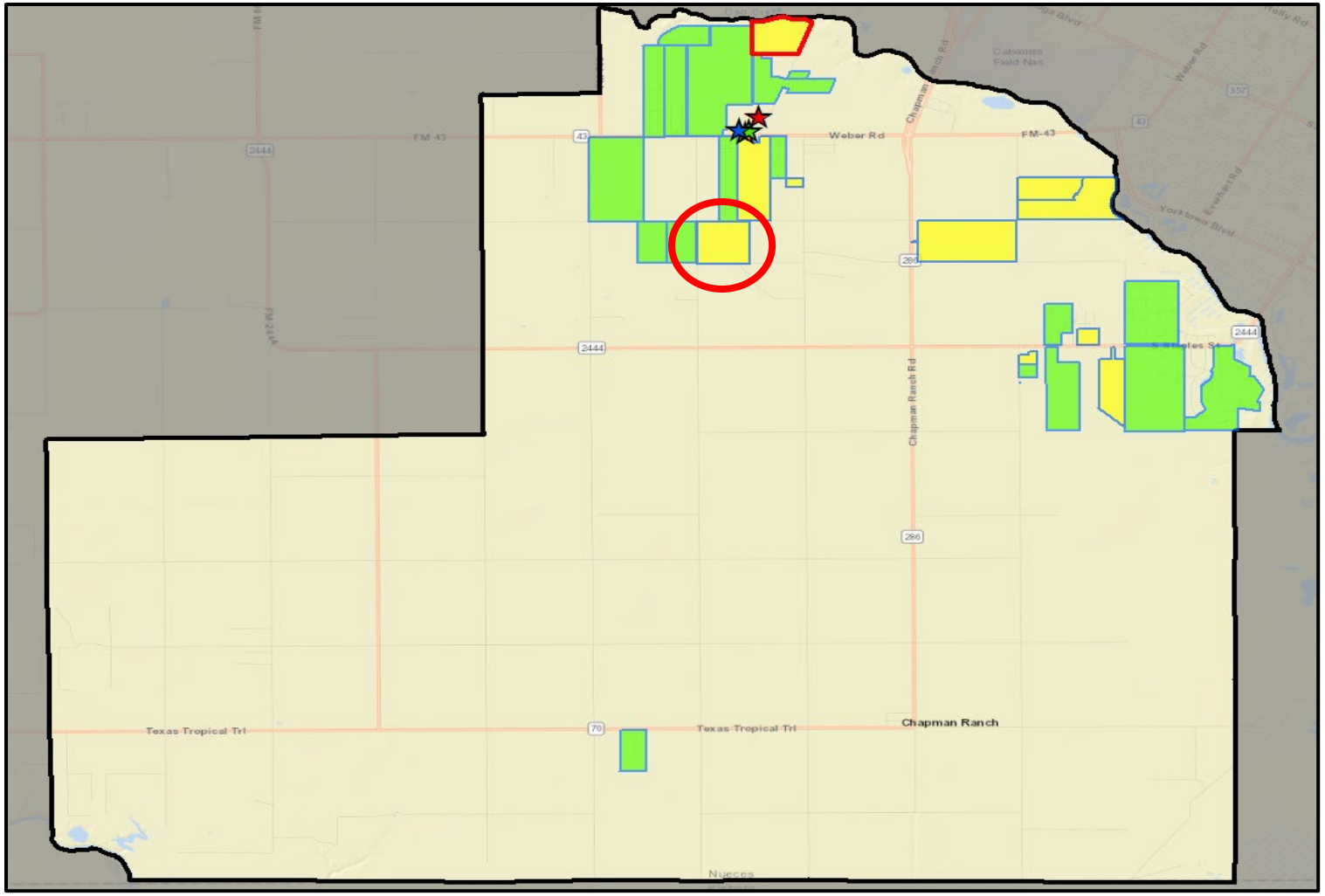
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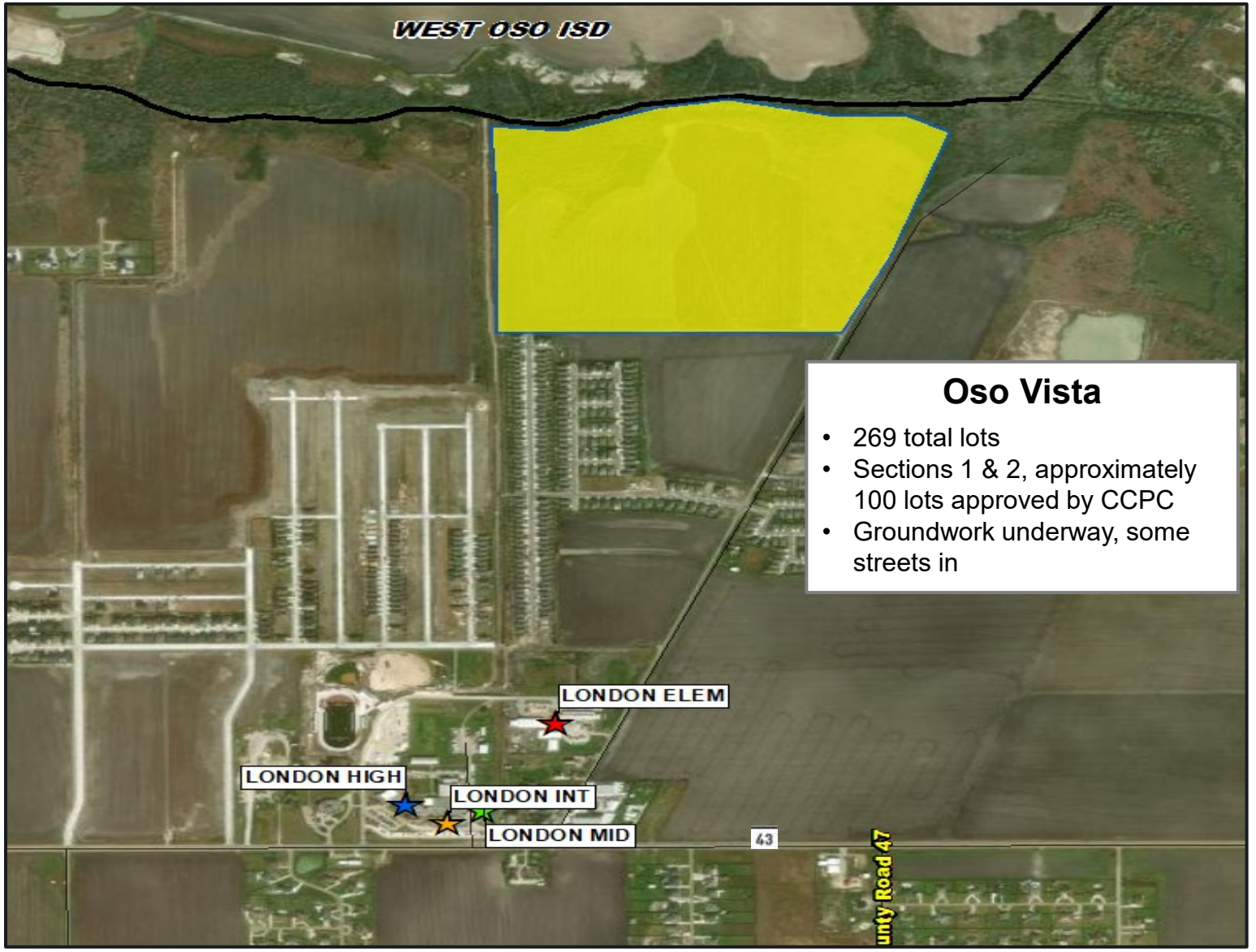


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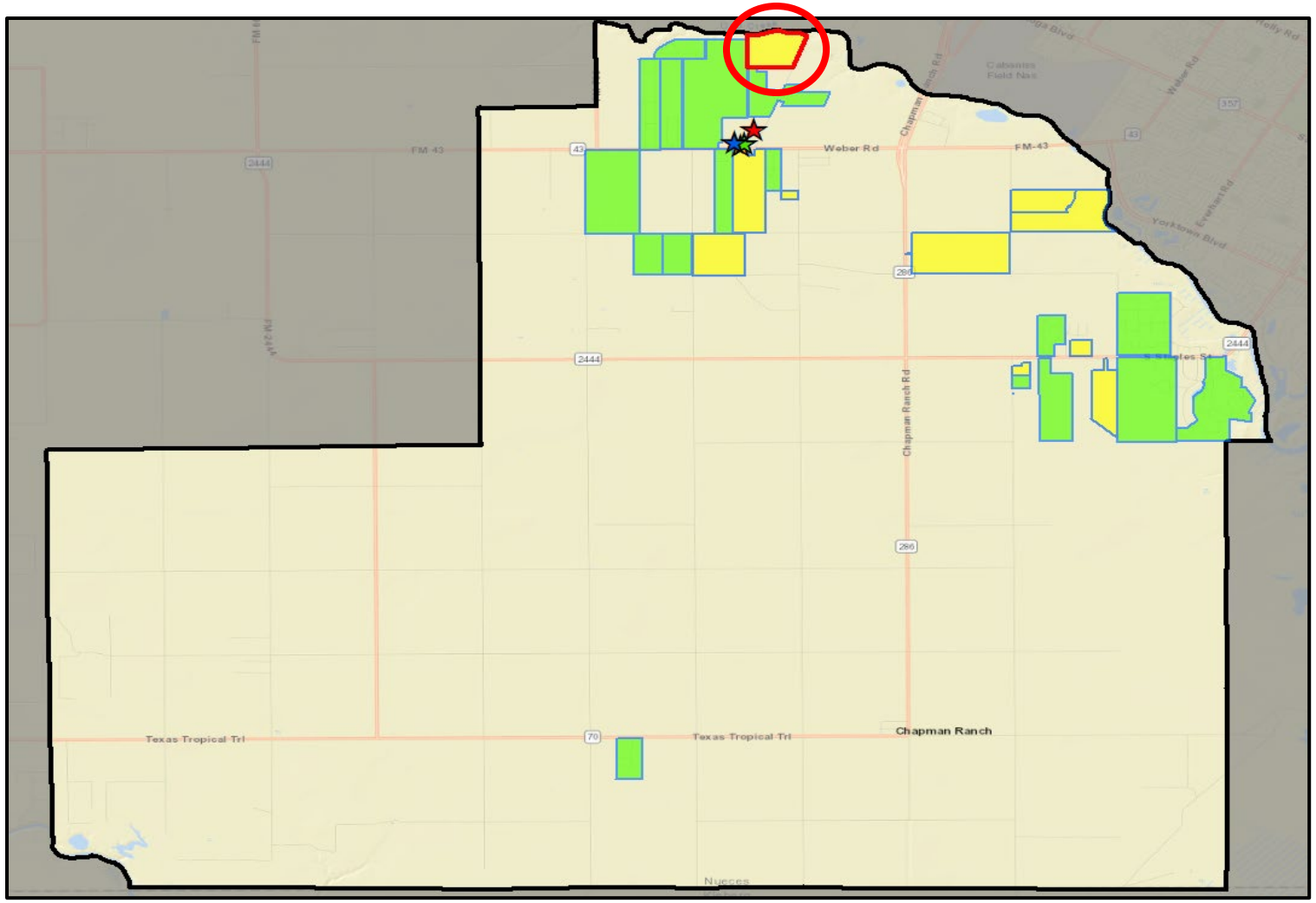


Oso Vista

- 269 total lots
- Sections 1 & 2, approximately 100 lots approved by CCPC
- Groundwork underway, some streets in

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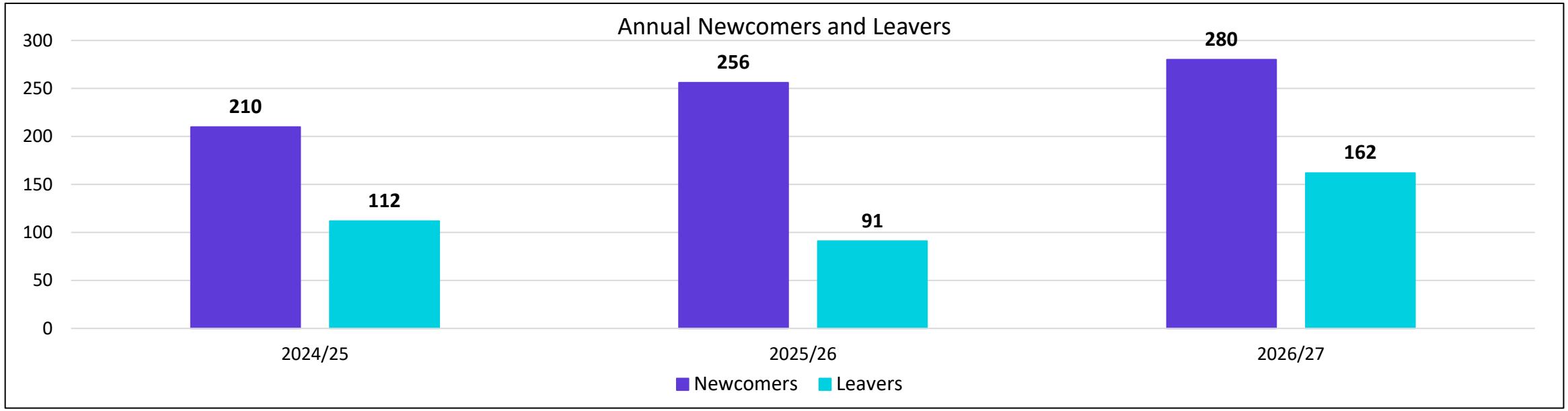
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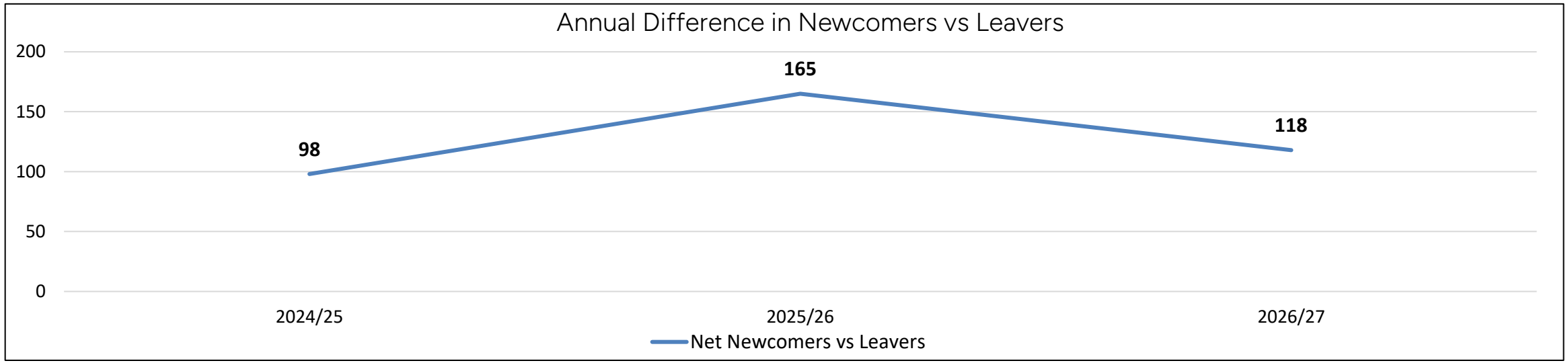
Enrollment – Data & Trends

Student Mobility & Birthrates

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Enrollment Forecast

10 Year Forecast & Campus Projections

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GRADE LEVEL ENROLLMENT HISTORY

Year	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	Total %
2022/23	0	51	99	99	95	114	105	113	139	132	122	128	132	132	115	1,576	150	9.5%
2023/24	0	52	108	123	117	115	128	123	130	154	136	139	132	134	135	1,726	150	9.5%
2024/25	1	53	91	117	132	137	144	146	137	144	163	139	138	129	135	1,806	80	4.6%
2025/26	1	56	109	103	128	148	159	157	163	154	157	172	142	143	132	1,924	118	6.5%
2026/27	5	80	113	128	119	140	165	168	171	184	166	162	179	136	142	2,058	134	7.0%

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

- Current enrollment – 2,058
- 134 student increase from 2025/26

GRADE LEVEL COHORT HISTORY

Cohort		PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Elem	Int	Middle	High
3 Year Avg.		1.168	1.026	1.130	1.108	1.129	1.176	1.096	1.106	1.120	1.076	1.036	1.018	0.990	1.008	1.114	1.101	1.098	1.013
2023/24		1.020	1.091	1.242	1.182	1.211	1.123	1.171	1.150	1.108	1.030	1.139	1.031	1.015	1.023	1.170	1.161	1.069	1.052
2024/25		1.019	0.843	1.083	1.073	1.171	1.252	1.141	1.114	1.108	1.058	1.022	0.993	0.977	1.007	1.084	1.127	1.083	1.000
2025/26		1.057	1.198	1.132	1.094	1.121	1.161	1.090	1.116	1.124	1.090	1.055	1.022	1.036	1.023	1.141	1.103	1.107	1.034
2026/27		1.429	1.037	1.174	1.155	1.094	1.115	1.057	1.089	1.129	1.078	1.032	1.041	0.958	0.993	1.115	1.073	1.103	1.006

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GRADE LEVEL ENROLLMENT HISTORY

Year	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	Total %
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2024/25	1	53	91	117	132	137	144	146	137	144	163	139	138	129	135	1,806	80	4.6%
2025/26	1	56	109	103	128	148	159	157	163	154	157	172	142	143	132	1,924	118	6.5%
2026/27	5	80	113	128	119	140	165	168	171	184	166	162	179	136	142	2,058	134	7.0%

- Largest class is 7th grade
  - 2nd largest the last 2 years
- 2nd largest class is 10th grade
  - Largest class the last 4 years

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

GRADE LEVEL COHORT HISTORY

Cohort		PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Elem	Int	Middle	High
3 Year Avg.		1.168	1.026	1.130	1.108	1.129	1.176	1.096	1.106	1.120	1.076	1.036	1.018	0.990	1.008	1.114	1.101	1.098	1.013
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2024/25		1.019	0.843	1.083	1.073	1.171	1.252	1.141	1.114	1.108	1.058	1.022	0.993	0.977	1.007	1.084	1.127	1.083	1.000
2025/26		1.057	1.198	1.132	1.094	1.121	1.161	1.090	1.116	1.124	1.090	1.055	1.022	1.036	1.023	1.141	1.103	1.107	1.034
2026/27		1.429	1.037	1.174	1.155	1.094	1.115	1.057	1.089	1.129	1.078	1.032	1.041	0.958	0.993	1.115	1.073	1.103	1.006

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GRADE LEVEL ENROLLMENT HISTORY

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2023/24	0	52	108	123	117	115	128	123	130	154	136	139	132	134	135	1,726	150	9.5%
2024/25	1	53	91	117	132	137	144	146	137	144	163	139	138	129	135	1,806	80	4.6%
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2026/27	5	80	113	128	119	140	165	168	171	184	166	162	179	136	142	2,058	134	7.0%

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

Year	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total
2026/27	1	60	128	125	113	147	176	184	182	178	163	168	176	147	146	2,094
	4	20	-15	3	6	-7	-11	-16	-11	6	3	-6	3	-11	-4	-36
	400%	33%	-12%	2%	5%	-5%	-6%	-9%	-6%	3%	2%	-4%	2%	-7%	-3%	-1.7%

GRADE LEVEL COHORT HISTORY

Cohort		PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Elem	Int	Middle	High
3 Year Avg.		1.168	1.026	1.130	1.108	1.129	1.176	1.096	1.106	1.120	1.076	1.036	1.018	0.990	1.008	1.114	1.101	1.098	1.013
2023/24		1.020	1.091	1.242	1.182	1.211	1.123	1.171	1.150	1.108	1.030	1.139	1.031	1.015	1.023	1.170	1.161	1.069	1.052
2024/25		1.019	0.843	1.083	1.073	1.171	1.252	1.141	1.114	1.108	1.058	1.022	0.993	0.977	1.007	1.084	1.127	1.083	1.000
2025/26		1.057	1.198	1.132	1.094	1.121	1.161	1.090	1.116	1.124	1.090	1.055	1.022	1.036	1.023	1.141	1.103	1.107	1.034
2026/27		1.429	1.037	1.174	1.155	1.094	1.115	1.057	1.089	1.129	1.078	1.032	1.041	0.958	0.993	1.115	1.073	1.103	1.006

- 2026-27 Enrollment projections were high by 36 students or 1.2%
- PK, Kindergarten, and 5th grade were the grades with greatest differences

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GRADE LEVEL ENROLLMENT HISTORY

Year	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	Total %
2022/23	0	51	99	99	95	114	105	113	139	132	122	128	132	132	115	1,576	150	9.5%
2023/24	0	52	108	123	117	115	128	123	130	154	136	139	132	134	135	1,726	150	9.5%
2024/25	1	53	91	117	132	137	144	146	137	144	163	139	138	129	135	1,806	80	4.6%
2025/26	1	56	109	103	128	148	159	157	163	154	157	172	142	143	132	1,924	118	6.5%
2026/27	5	80	113	128	119	140	165	168	171	184	166	162	179	136	142	2,058	134	7.0%

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

Year	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total
2026/27	1	60	128	125	113	147	176	184	182	178	163	168	176	147	146	2,094
	4	20	-15	3	6	-7	-11	-16	-11	6	3	-6	3	-11	-4	-36
	400%	33%	-12%	2%	5%	-5%	-6%	-9%	-6%	3%	2%	-4%	2%	-7%	-3%	-1.7%

GRADE LEVEL COHORT HISTORY

Cohort		PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Elem	Int	Middle	High
3 Year Avg.		1.168	1.026	1.130	1.108	1.129	1.176	1.096	1.106	1.120	1.076	1.036	1.018	0.990	1.008	1.114	1.101	1.098	1.013
2023/24		1.020	1.091	1.242	1.182	1.211	1.123	1.171	1.150	1.108	1.030	1.139	1.031	1.015	1.023	1.170	1.161	1.069	1.052
2024/25		1.019	0.843	1.083	1.073	1.171	1.252	1.141	1.114	1.108	1.058	1.022	0.993	0.977	1.007	1.084	1.127	1.083	1.000
2025/26		1.057	1.198	1.132	1.094	1.121	1.161	1.090	1.116	1.124	1.090	1.055	1.022	1.036	1.023	1.141	1.103	1.107	1.034
2026/27		1.429	1.037	1.174	1.155	1.094	1.115	1.057	1.089	1.129	1.078	1.032	1.041	0.958	0.993	1.115	1.073	1.103	1.006

- The highest cohort occurred in 2nd grade.
- All grades grew from 2025/26 except 11th and 12th grades.

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London ISD - Ten Year Forecast by Grade Level

Year	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	% Growth
2022/23	0	51	99	99	95	114	105	113	139	132	122	128	132	132	115	1,576	150	9.5%
2023/24	0	52	108	123	117	115	128	123	130	154	136	139	132	134	135	1,726	150	9.5%
2024/25	1	53	91	117	132	137	144	146	137	144	163	139	138	129	135	1,806	80	4.6%
2025/26	1	56	109	103	128	148	159	157	163	154	157	172	142	143	132	1,924	118	6.5%
2026/27	5	80	113	128	119	140	165	168	171	184	166	162	179	136	142	2,058	134	7.0%
2027/28	5	80	120	127	141	132	162	177	183	192	197	172	167	177	137	2,169	111	5.4%
2028/29	5	80	132	134	140	156	151	173	192	206	204	205	177	166	178	2,300	131	6.0%
2029/30	5	80	141	143	145	151	168	162	189	216	220	211	212	174	166	2,383	83	3.6%
2030/31	5	80	151	152	154	157	163	180	176	212	230	228	218	210	175	2,491	108	4.5%
2031/32	5	85	163	162	163	165	168	174	196	198	226	239	235	215	211	2,605	114	4.6%
2032/33	5	85	175	171	170	171	173	180	190	220	211	235	247	232	216	2,681	76	2.9%
2033/34	5	85	188	182	178	177	178	185	196	214	235	219	243	244	233	2,762	81	3.0%
2034/35	5	90	202	196	189	185	184	190	202	220	228	244	226	240	245	2,846	84	3.0%
2035/36	5	90	217	210	204	197	192	193	204	227	235	237	252	223	241	2,927	81	2.8%
2036/37	5	90	233	226	218	212	205	198	203	229	242	244	245	249	224	3,023	96	3.3%

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London ISD - Ten Year Forecast by Grade Level

Year	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	% Growth
2022/23	0	51	99	99	95	114	105	113	139	132	122	128	132	132	115	1,576	150	9.5%
2023/24	0	52	108	123	117	115	128	123	130	154	136	139	132	134	135	1,726	150	9.5%
2024/25	1	53	91	117	132	137	144	146	137	144	163	139	138	129	135	1,806	80	4.6%
2025/26	1	56	109	103	128	148	159	157	163	154	157	172	142	143	132	1,924	118	6.5%
2026/27	5	80	113	128	119	140	165	168	171	184	166	162	179	136	142	2,058	134	7.0%
2027/28	5	80	120	127	141	132	162	177	183	192	197	172	167	177	137	2,169	111	5.4%
2028/29	5	80	132	134	140	156	151	173	192	206	204	205	177	166	178	2,300	131	6.0%
2029/30	5	80	141	143	145	151	168	162	189	216	220	211	212	174	166	2,383	83	3.6%
2030/31	5	80	151	152	154	157	163	180	176	212	230	228	218	210	175	2,491	108	4.5%
2031/32	5	85	163	162	163	165	168	174	196	198	226	239	235	215	211	2,605	114	4.6%
2032/33	5	85	175	171	170	171	173	180	190	220	211	235	247	232	216	2,681	76	2.9%
2033/34	5	85	188	182	178	177	178	185	196	214	235	219	243	244	233	2,762	81	3.0%
2034/35	5	90	202	196	189	185	184	190	202	220	228	244	226	240	245	2,846	84	3.0%
2035/36	5	90	217	210	204	197	192	193	204	227	235	237	252	223	241	2,927	81	2.8%
2036/37	5	90	233	226	218	212	205	198	203	229	242	244	245	249	224	3,023	96	3.3%

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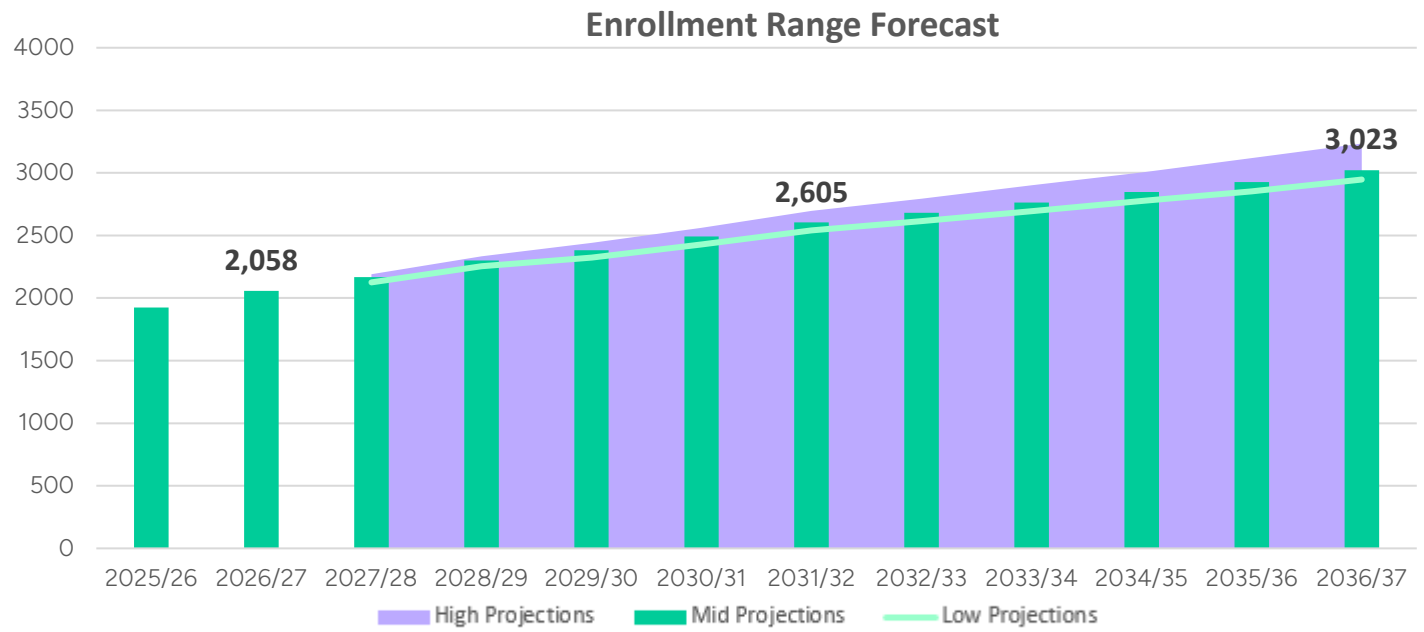
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Campus	Capacity	HISTORY	Fall	ENROLLMENT PROJECTIONS									
		2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37
London Primary School (PK-K)	352	166	198	205	217	226	236	253	265	278	297	312	328
London Elementary School (1-4)	670	538	552	562	581	607	626	658	685	715	754	803	861
ELEMENTARY TOTAL		704	750	767	798	833	862	911	950	993	1,051	1,115	1,189
Elementary Absolute Change		29	46	17	31	35	29	49	39	43	58	64	74
Elementary Percent Change		4.30%	6.53%	2.27%	4.04%	4.39%	3.48%	5.68%	4.28%	4.53%	5.84%	6.09%	6.64%
London Middle School (5-8)	900	631	689	749	776	787	798	794	801	830	840	859	872
MIDDLE SCHOOL TOTAL		631	689	749	776	787	798	794	801	830	840	859	872
Middle School Absolute Change		324	58	60	27	11	11	-4	7	29	10	19	13
Middle School Percent Change			9.19%	8.66%	3.62%	1.38%	1.44%	-0.44%	0.82%	3.64%	1.23%	2.23%	1.47%
London High School (9-12)	770	589	619	653	726	763	831	900	930	939	955	953	962
HIGH SCHOOL TOTAL		589	619	653	726	763	831	900	930	939	955	953	962
High School Absolute Change		48	30	34	73	37	68	69	30	9	16	-2	9
High School Percent Change		8.89%	5.09%	5.49%	11.18%	5.10%	8.91%	8.30%	3.33%	0.97%	1.70%	-0.21%	0.94%
Alternative Campus		0	0	0	0	0	0	0	0	0	0	0	0
DISTRICT TOTALS		**1,924**	**2,058**	**2,169**	**2,300**	**2,383**	**2,491**	**2,605**	**2,681**	**2,762**	**2,846**	**2,927**	**3,023**
District Absolute Change		118	134	111	131	83	108	114	76	81	84	81	96
District Percent Change		7.54%	7.42%	5.38%	6.05%	3.60%	4.55%	4.60%	2.90%	3.03%	3.05%	2.84%	3.27%

Green = w/in 5% of Capacity; Yellow = Over Capacity

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London ISD - Ten Year Forecast Range



School Year	Low Projections	Mid Projections	High Projections
2025/26		1,924	
2026/27		2,058	
2027/28	2,125	2,169	2,190
2028/29	2,254	2,300	2,334
2029/30	2,323	2,383	2,442
2030/31	2,429	2,491	2,561
2031/32	2,540	2,605	2,697
2032/33	2,614	2,681	2,793
2033/34	2,693	2,762	2,900
2034/35	2,775	2,846	3,003
2035/36	2,854	2,927	3,117
2036/37	2,947	3,023	3,234

Low Range Projections

- Lower Kindergarten & Early Elementary Grade Enrollment
- Slow down in Housing Starts & Closings
- Increases in Homeschooling & Private School Enrollment
- School of Choice options lower overall housing yields

Mid-Range Projections

- Economic Conditions remain stable
- Continued population growth & Housing Activity
- Minimal Impact from trends in Homeschooling & Private School Enrollment
- Maintaining current housing yields
- Current Transfer patterns remain

High Range Projections

- Kindergarten vs birth ratios remain steady
- Future Interest Rate Cuts & Favorable Mortgage Rates
- Surge in Housing Starts & Closings
- Programs and Marketing Efforts increase Enrollment through Transfer Students
- Impacts of vouchers is limited

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Key Takeaways

District Information



London ISD enrollment increased by **482 students over the last five years**. The District has seen enrollment grow this new 2026-27 school year by **134 students**.

Housing Market Conditions



LISD existing and new home sales are significantly below 2025 totals YTD and are likely to end the year this way as rising interest rates and stubbornly high inflation continue to discourage potential home buyers.

Housing Activity & Future Developments -



The district currently has approximately **110 homes in active inventory**, roughly 620 lots available to build on, and nearly 2,800 planned in the future.

Enrollment Forecast -



LISD Enrollment is forecasted to reach 2,600 students by the 2031/32 school year, and with additional housing growth enrollment is anticipated to surpass 3,000 students by the 2036/37 school year.

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