



FORT BEND ISD

DEMOGRAPHIC STUDY

Spring 2023

POPULATION AND SURVEY ANALYSTS
WWW.PASATX.COM

2022-23 Demographic Study

Themes Impacting Projections



Early 2022 Housing Boom Followed by Cooling Housing Market

Various Communities Reaching Build-out

Small Size of the Incoming KG Class

Charter School Expansions

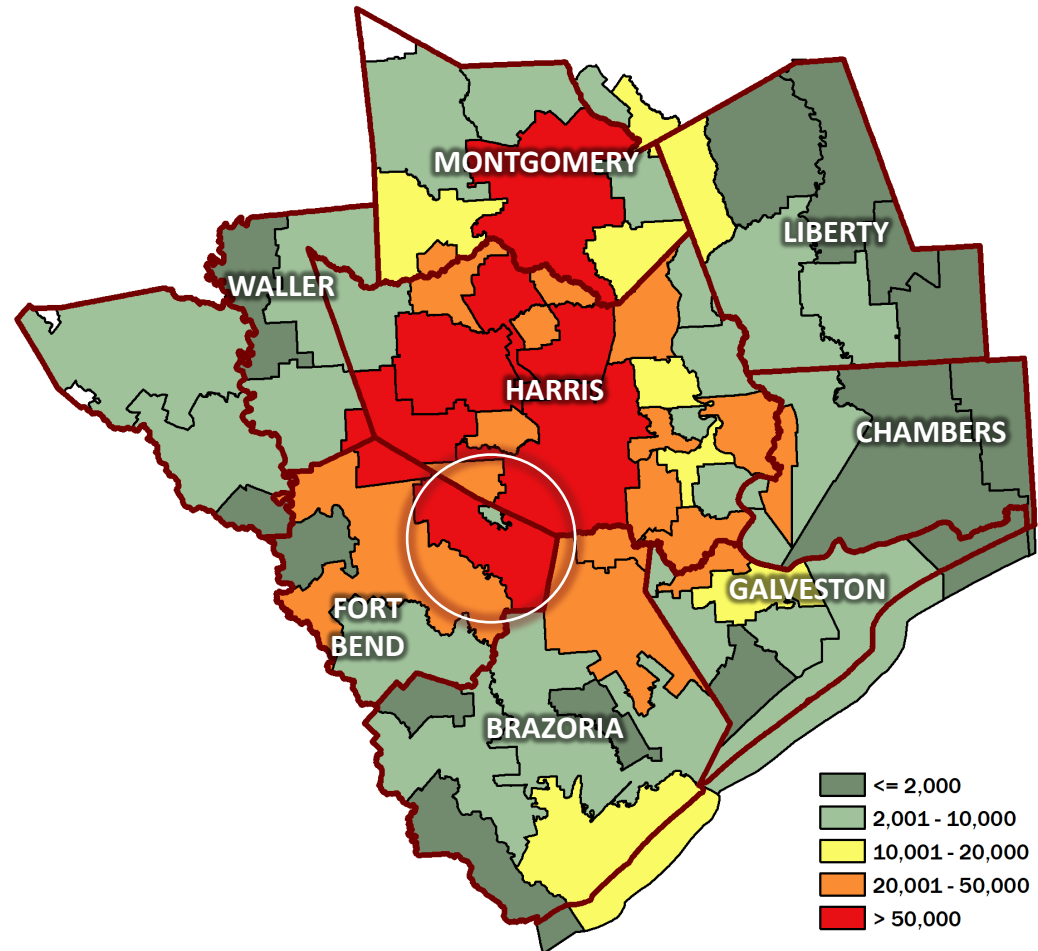
DEMOGRAPHIC TRENDS



Total Enrollment

PEIMS Snapshot 2021-22

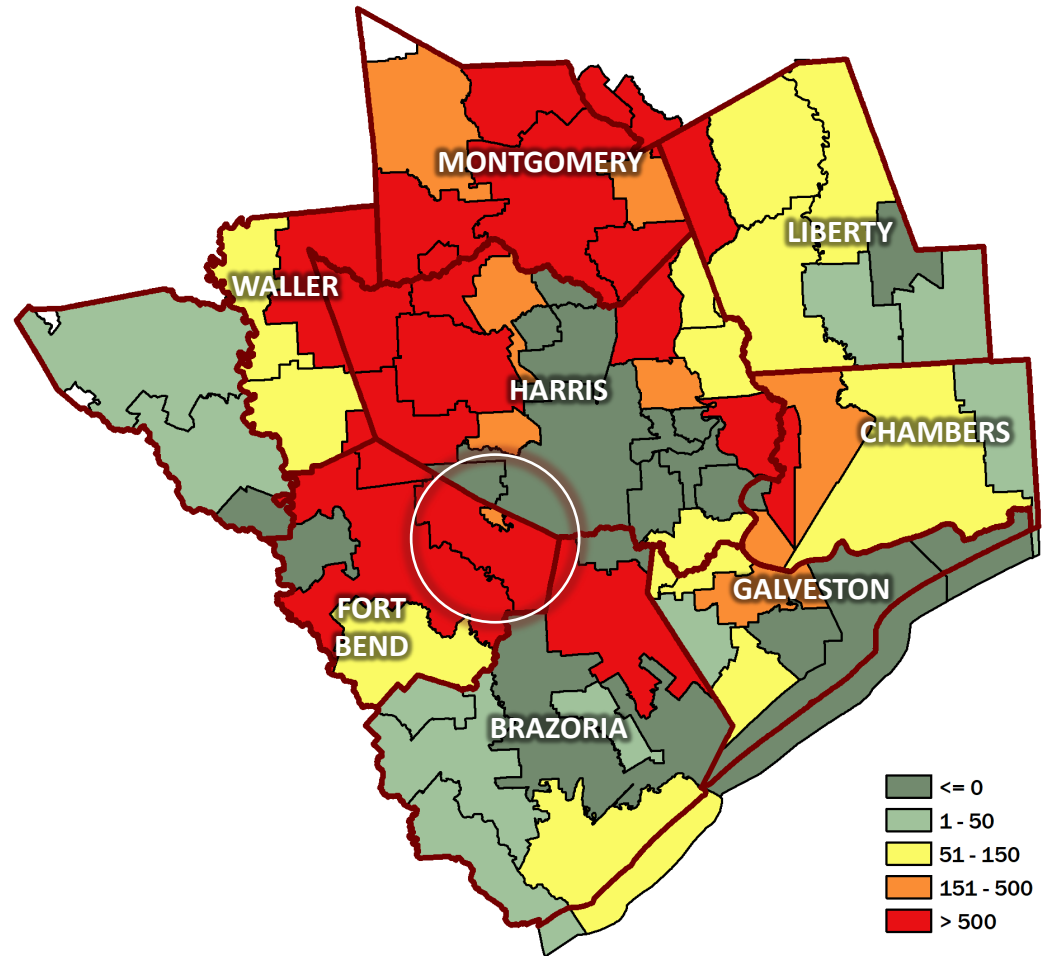
	School District	Enrollment
1	Houston ISD	194,607
2	Cy-Fair ISD	117,217
3	Katy ISD	88,368
4	Fort Bend ISD	77,545
5	Conroe ISD	67,761
6	Aldine ISD	61,633
7	Klein ISD	53,294
8	Pasadena ISD	49,326
9	Humble ISD	48,112
10	Clear Creek ISD	40,832
11	Alief ISD	40,664
12	Lamar CISD	39,579
13	Spring Branch ISD	33,545
14	Spring ISD	33,425
15	Alvin ISD	28,085



Numeric Change in Enrollment

Fall 2020 to Fall 2021

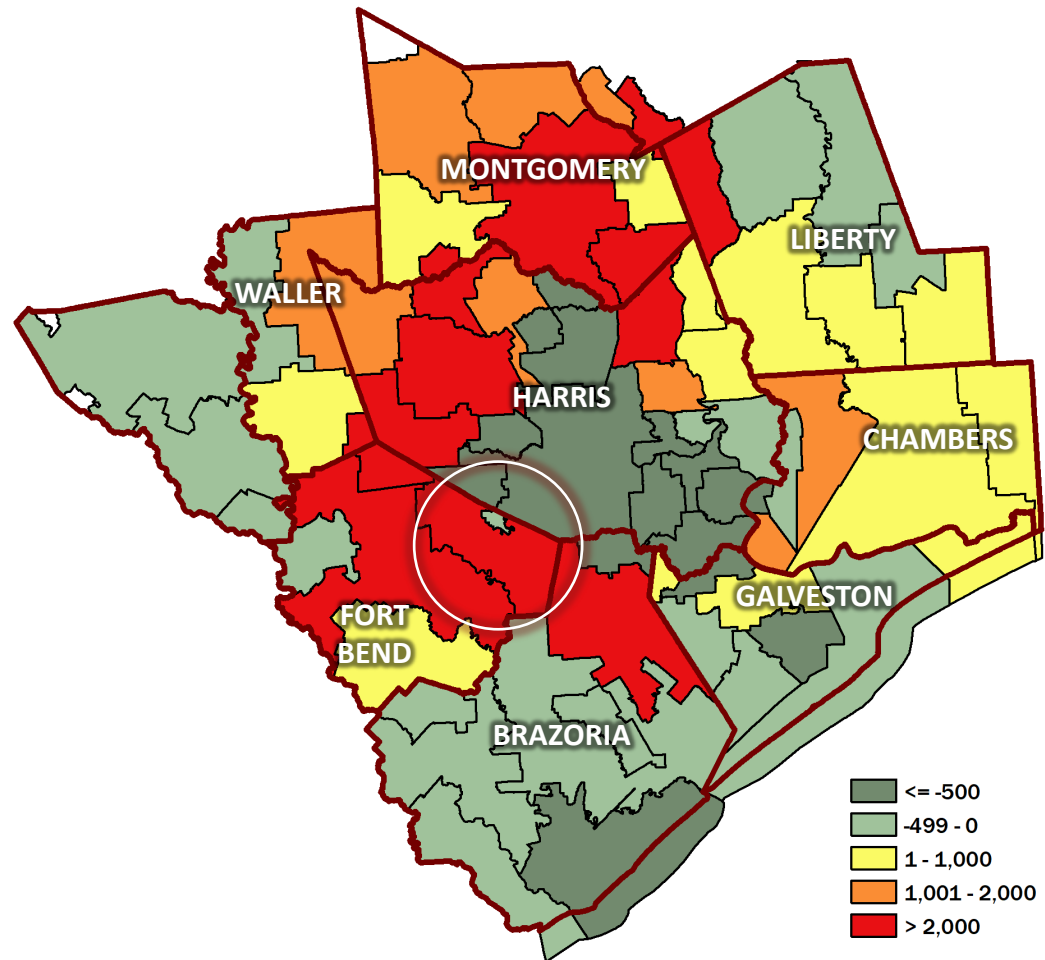
	School District	Change
1	Katy ISD	4,192
2	Conroe ISD	3,198
3	Lamar CISD	3,060
4	Humble ISD	2,584
5	Cy-Fair ISD	2,336
6	Cleveland ISD	1,972
7	Tomball ISD	1,596
8	Alvin ISD	1,079
9	New Caney ISD	842
10	Fort Bend ISD	810
11	Waller ISD	624
12	Goose Creek CISD	590
13	Willis ISD	550
14	Magnolia ISD	536
15	Klein ISD	470



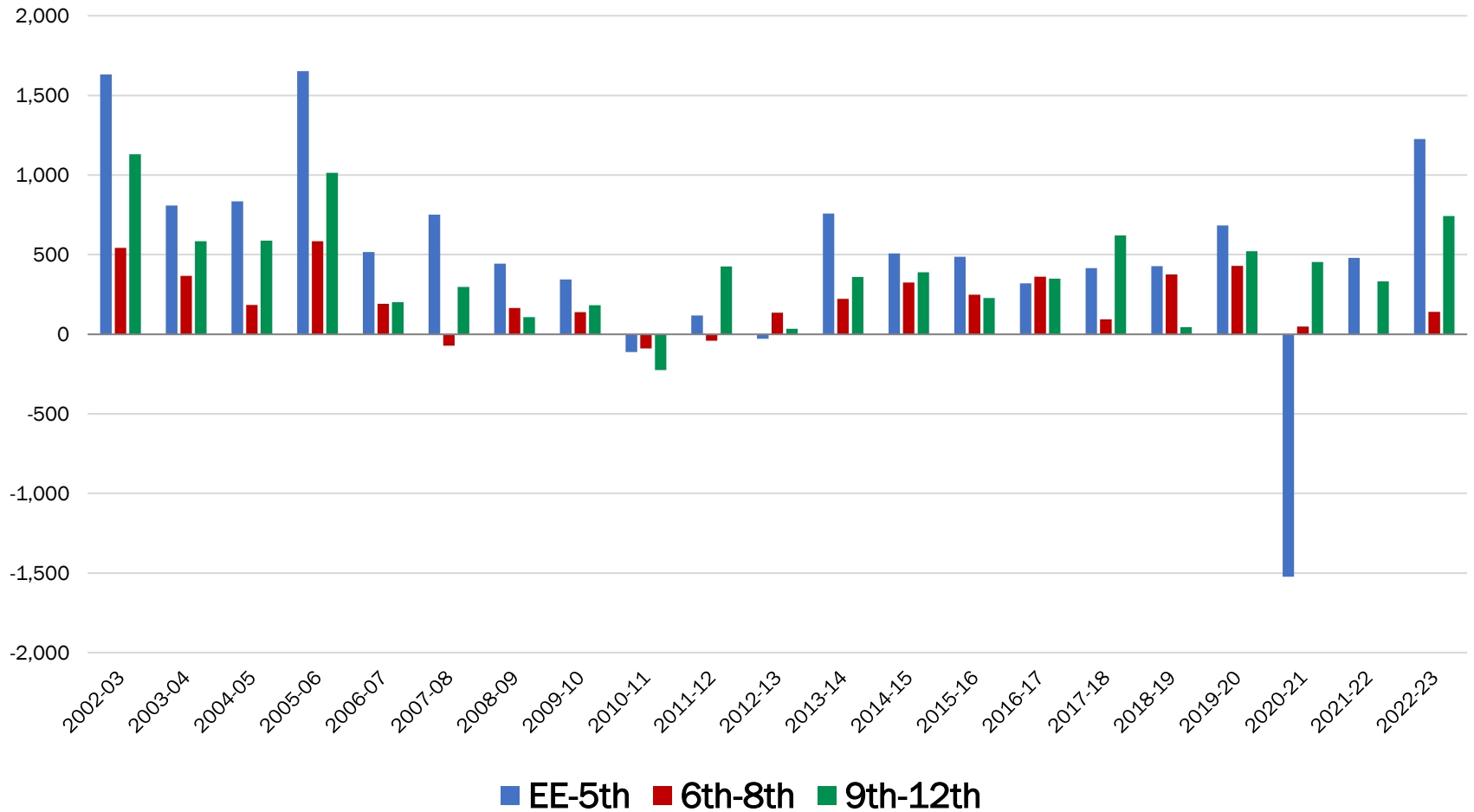
Numeric Change in Enrollment

Fall 2016 to Fall 2021

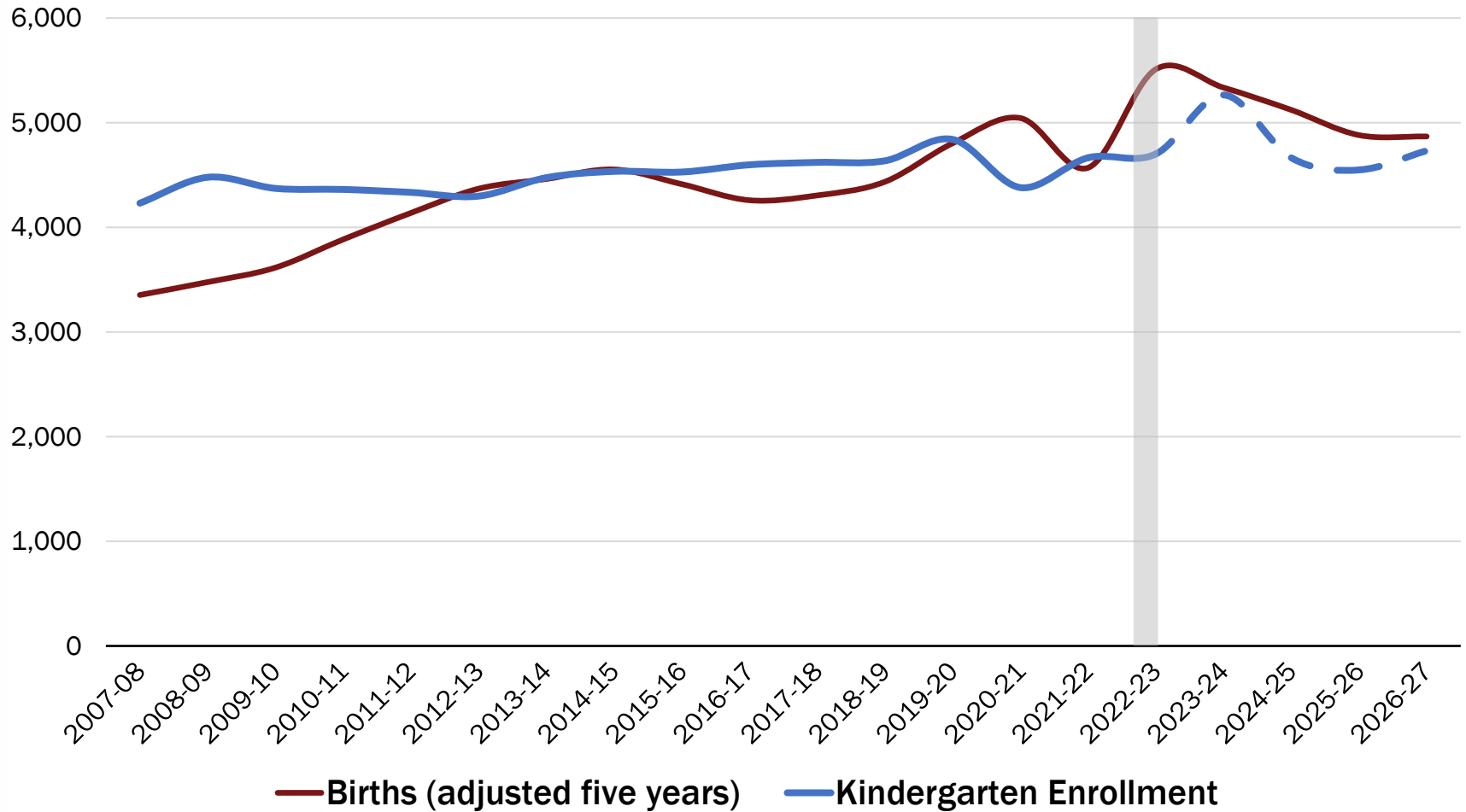
	School District	Change
1	Katy ISD	12,940
2	Lamar CISD	8,750
3	Conroe ISD	7,997
4	Humble ISD	6,888
5	Cleveland ISD	6,132
6	Tomball ISD	5,330
7	Alvin ISD	4,498
8	Fort Bend ISD	3,399
9	New Caney ISD	2,439
10	Cy-Fair ISD	2,349
11	Sheldon ISD	1,686
12	Barbers Hill ISD	1,552
13	Waller ISD	1,512
14	Klein ISD	1,484
15	Willis ISD	1,121



Enrollment Change by Grade Group



KG Enrollment vs. Live Births



CURRENT STUDENTS

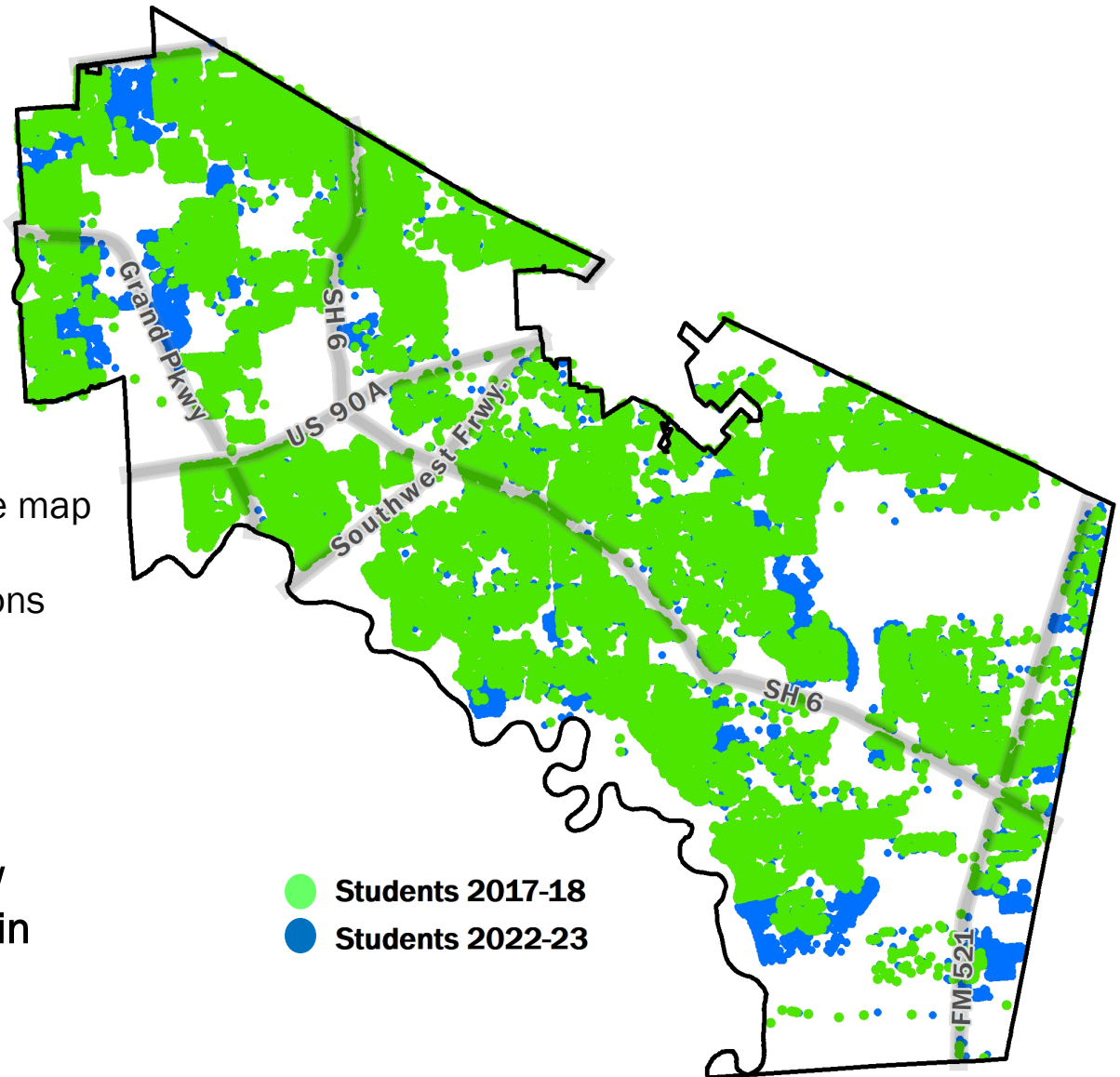


Student Geo-code

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

Blue areas highlight new students that didn't exist in 2017-18

**For illustrative purposes only*



Students per Household

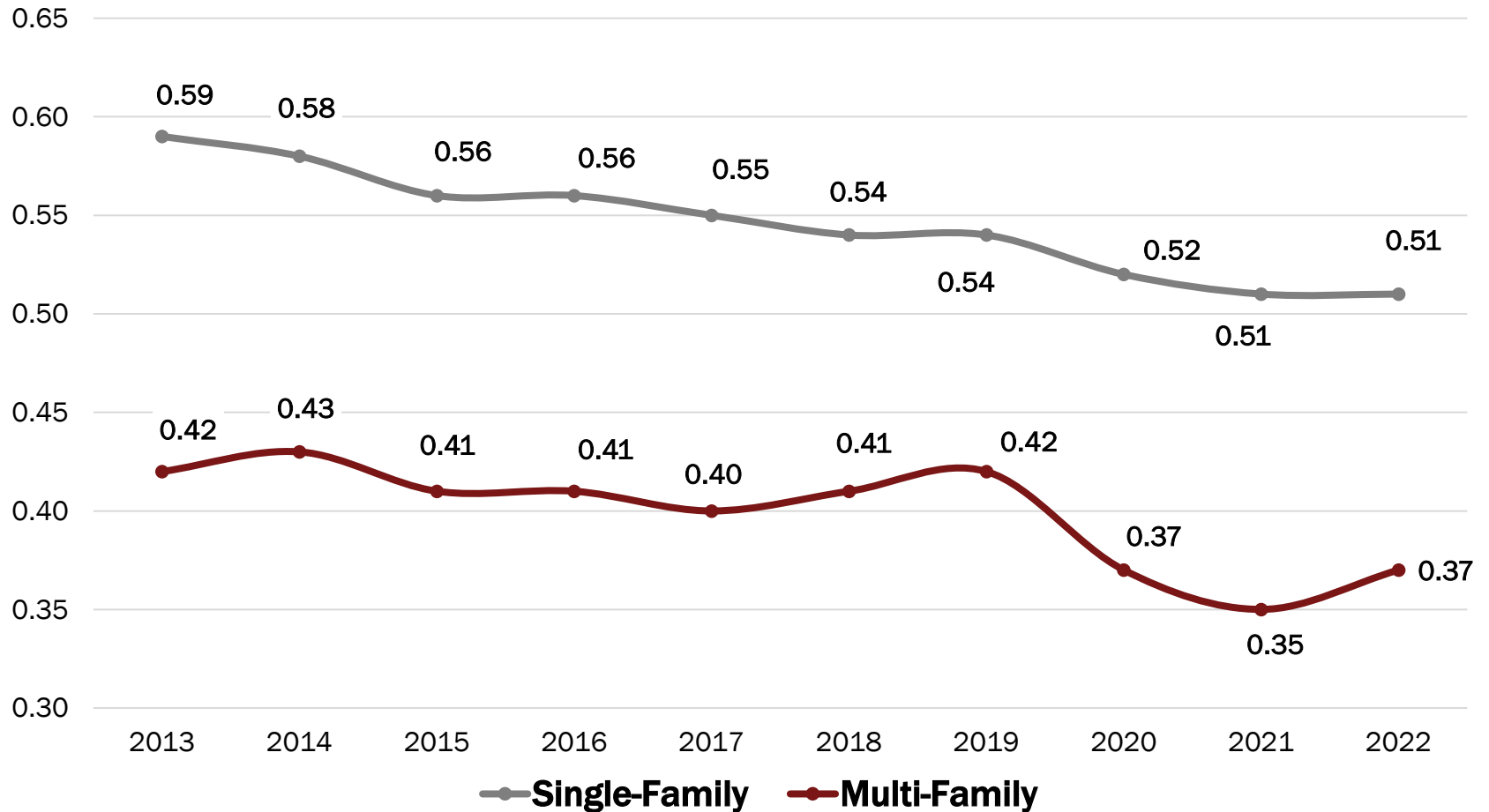
Single-Family



Multi-Family

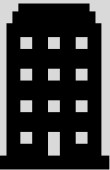


Students per Home Over Time



Student Growth by Housing Type

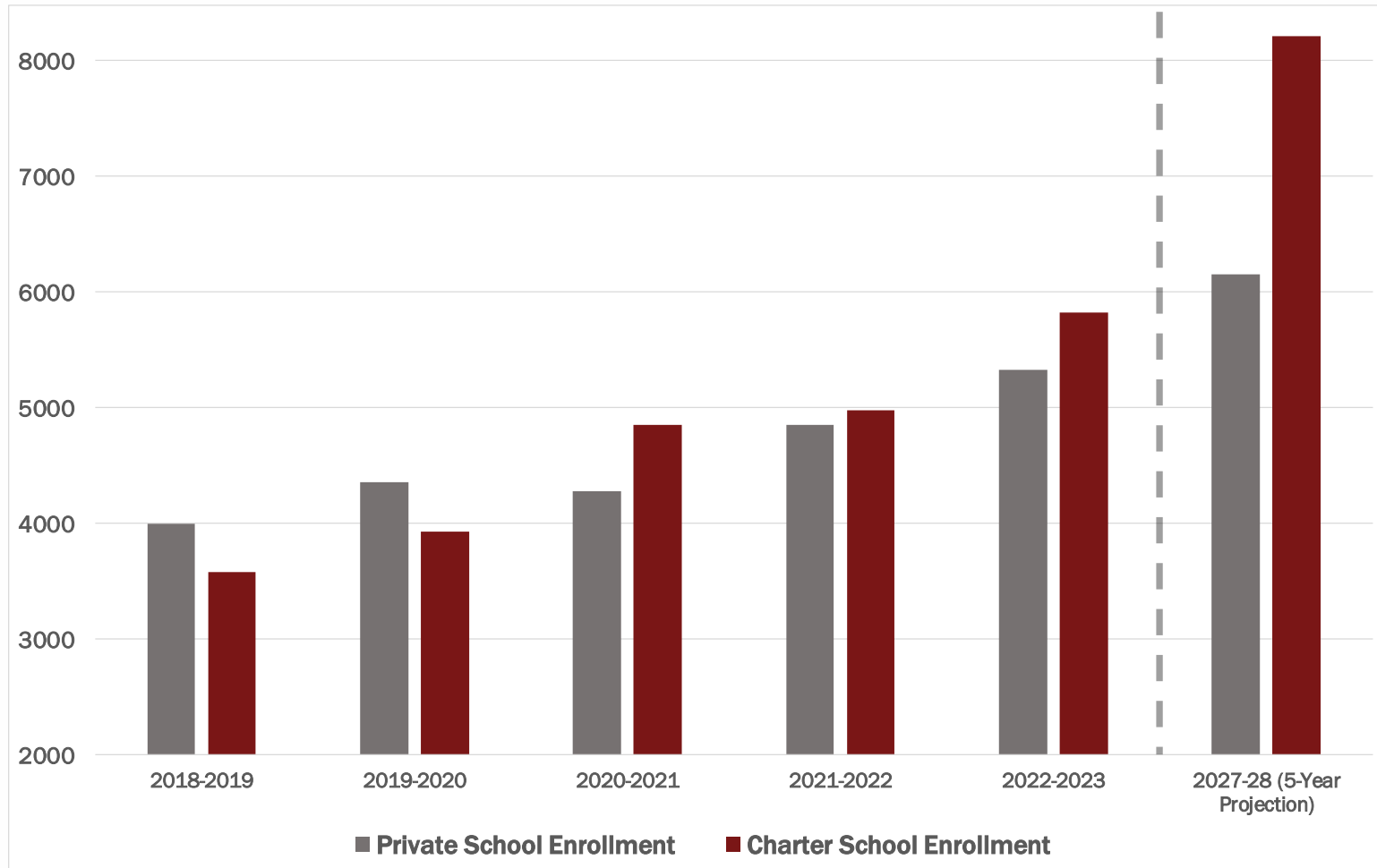


	2021	2022	Numeric Change	% Change	Pct of Growth
 Subdivisions - Built Out	66,928	67,575	647	1%	30%
 Subdivisions - Actively Developing	3,643	4,991	1,348	37%	62%
 Multi-Family	4,555	4,690	135	3%	6%
 Manufactured Homes	408	398	-10	-2%	—

Charter & Private School Enrollment



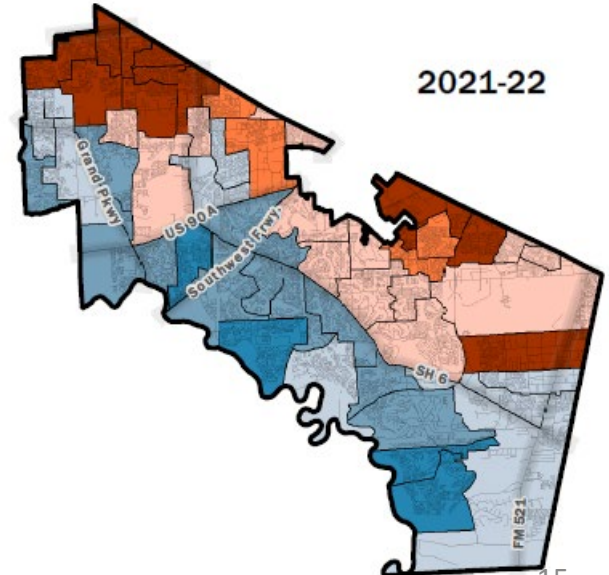
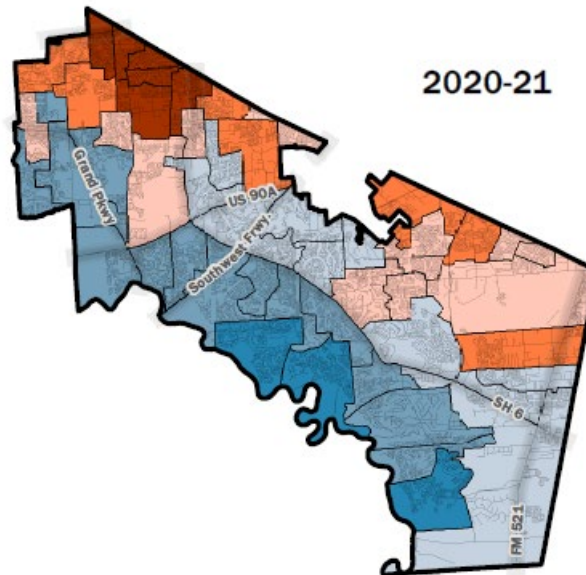
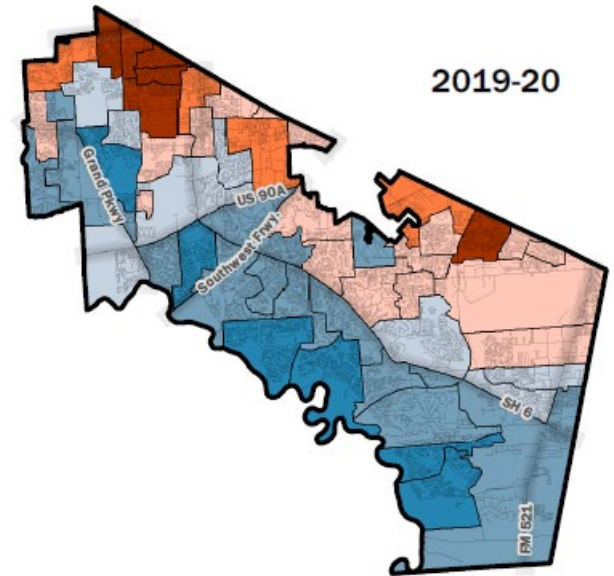
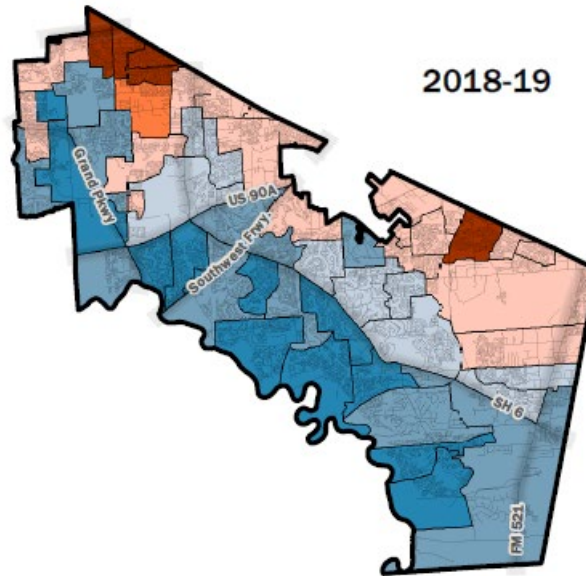
FBISD Residents Enrolled in Charter and Private Schools Over the Last Five Years



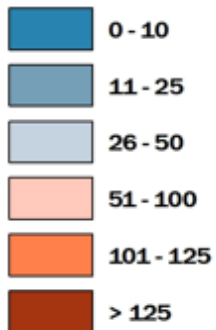
Sources: Texas Education Agency (TEA) and PASA surveys; TEA hides enrollments <10 due to FERPA privacy regulations. PASA estimated students per school in this situation.

FBISD Residents Attending Charter Schools

ES Attendance Zones 2018-19 to 2021-22

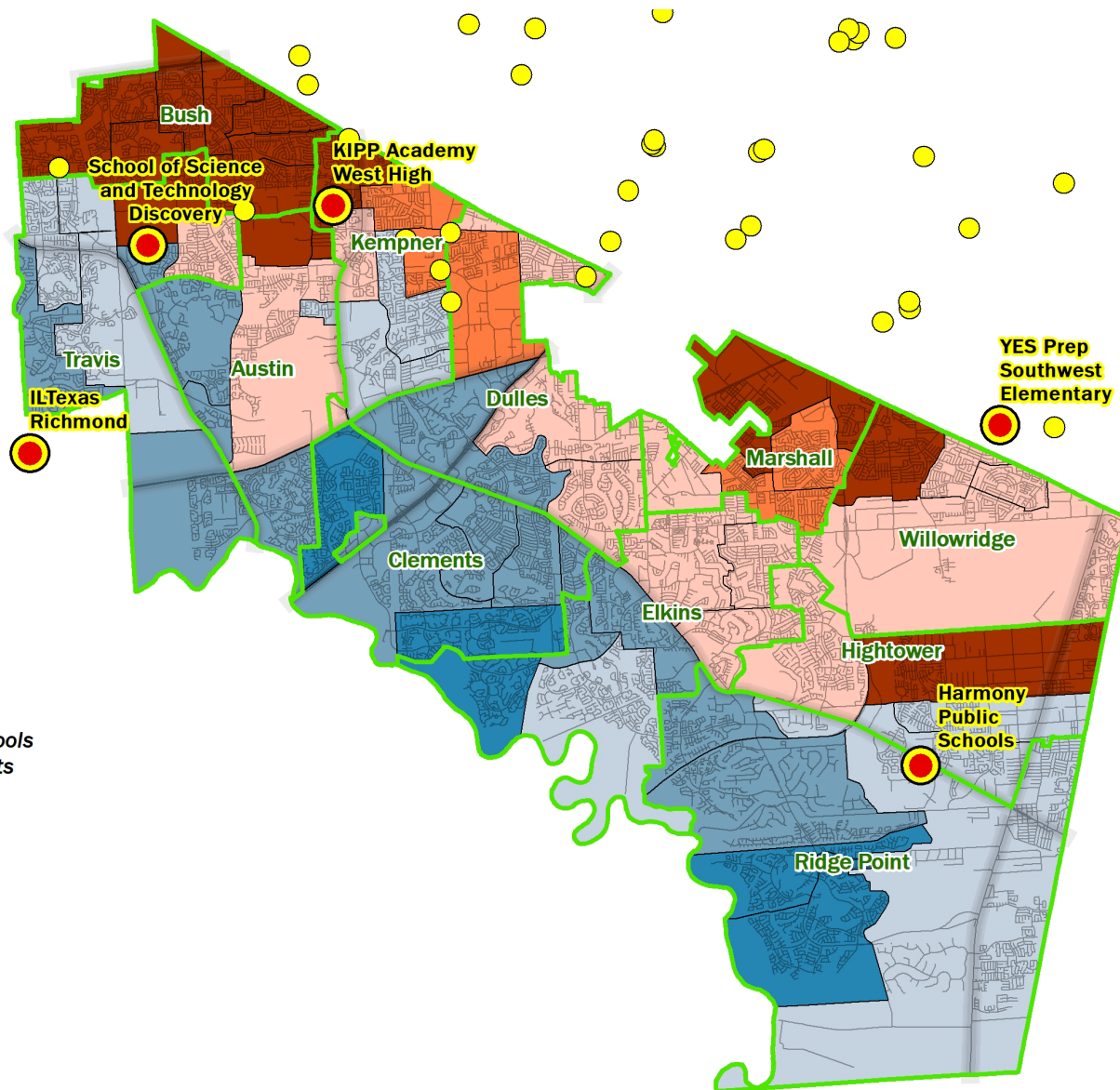


Charter Transfers by AZs



Charter Schools

Impacting Fort Bend ISD



New Charter Sites



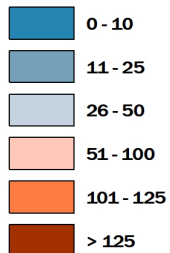
Charter School Locations

Area Charter Schools
w/FBISD Residents



High School Zones

Transfers to Charters



ECONOMY



Economy & Housing Market

Economic conditions throughout 2020 and 2021 nurtured a booming housing market. Contractionary monetary policies in 2022 are dampening housing considerably, but to what extent and for how long?



Economy at Large

**State & Regional Housing
Market**

Mortgage Rates & Affordability



PRINCIPAL & INTEREST PAYMENT ONLY

Home Price	Mortgage Rate					
	3.00%	4.00%	5.00%	6.00%	7.00%	8.00%
\$250,000	\$843	\$955	\$1,074	\$1,199	\$1,331	\$1,468
\$300,000	\$1,012	\$1,146	\$1,288	\$1,439	\$1,597	\$1,761
\$350,000	\$1,180	\$1,337	\$1,503	\$1,679	\$1,863	\$2,055
\$400,000	\$1,349	\$1,528	\$1,718	\$1,919	\$2,129	\$2,348
\$500,000	\$1,686	\$1,910	\$2,147	\$2,398	\$2,661	\$2,935
\$600,000	\$2,024	\$2,292	\$2,577	\$2,878	\$3,193	\$3,522

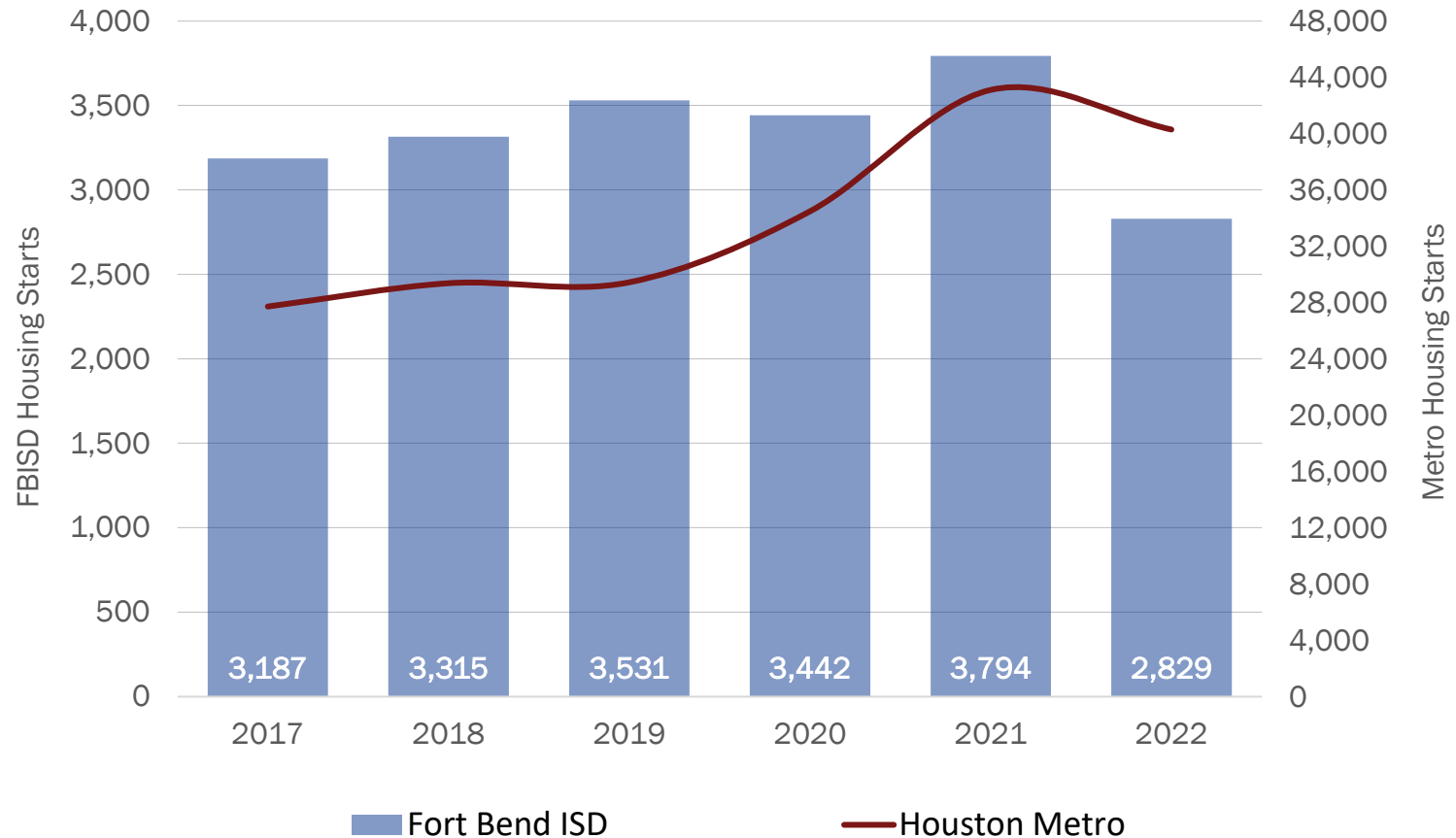
Calculations assume a 30-year loan term & 80% loan-to-value ratio. Taxes and insurance are not included.

HOUSING



Annual Housing Starts

Single-Family Housing in Fort Bend ISD

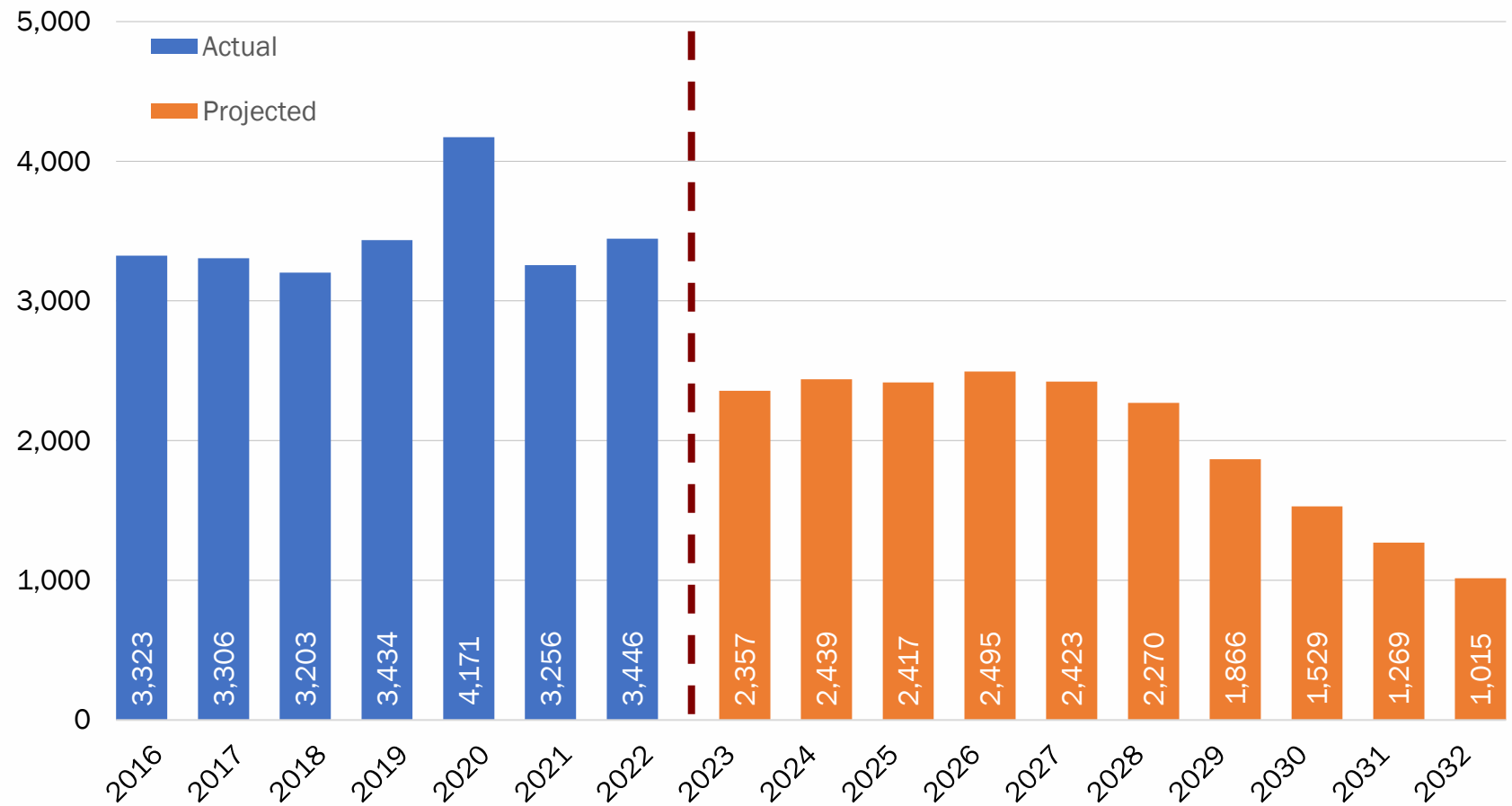


Source: Metrostudy

Annual New Housing Occupancies



Past & Projected Single-Family Housing in Fort Bend ISD



Source: PASA Demographic Studies, 2016-17 through 2022-23

Single-Family Housing

*Over the next 10 years, PASA projects 20,080 single-family units.
This is approximately 62% of total projected new housing.*



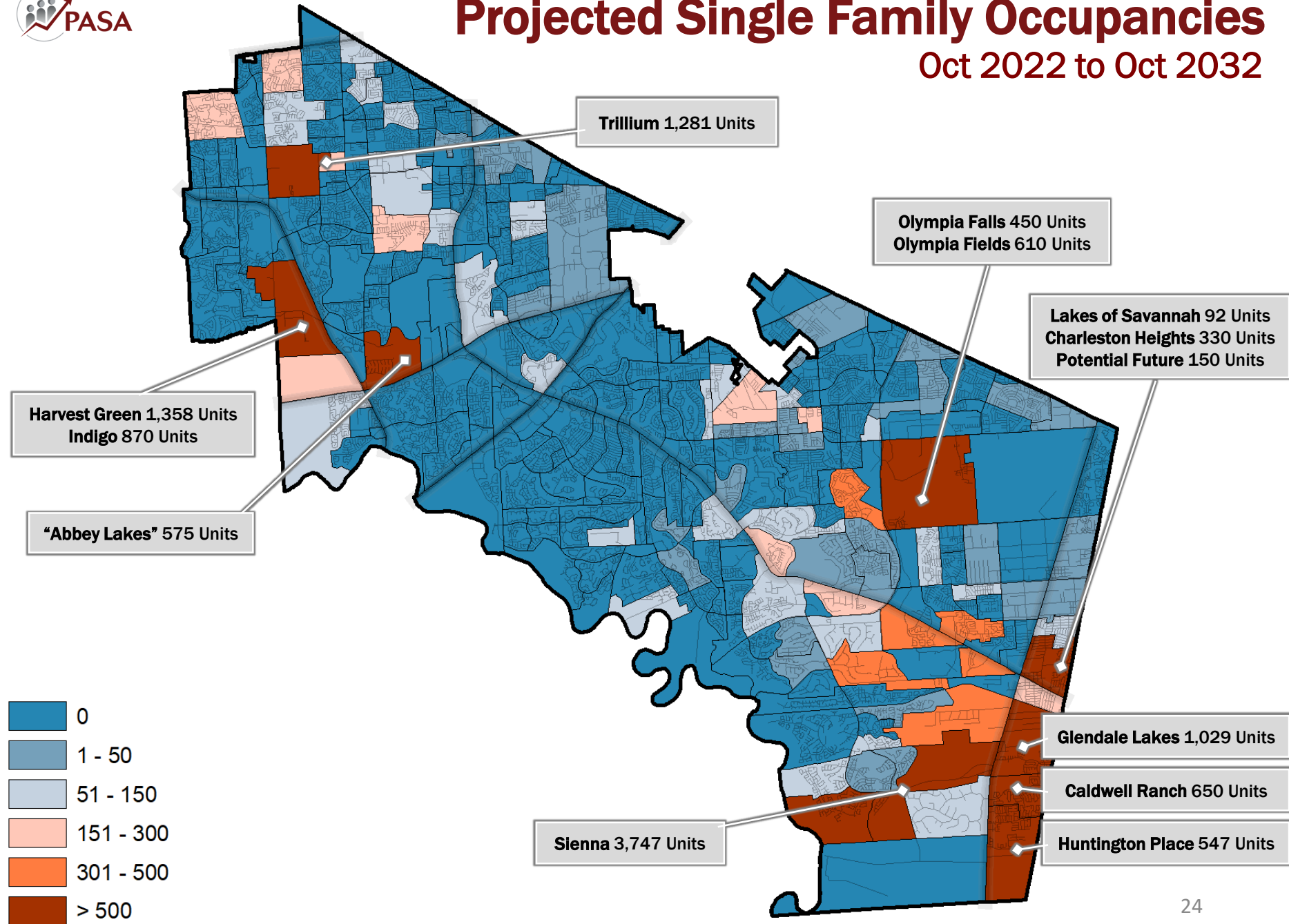
Occupancies

Ratios

**New projects planned or
underway**

Projected Single Family Occupancies

Oct 2022 to Oct 2032



Multi-Family Housing



*PASA projects 10,893 multi-family occupancies through 2032.
This is nearly 34% of total projected new housing.*



>2,500

Units under construction across
11 different complexes

>5,000

Units are projected to be
occupied in the next five years

Projected Multi-Family Occupancies

Oct 2022 to Oct 2032

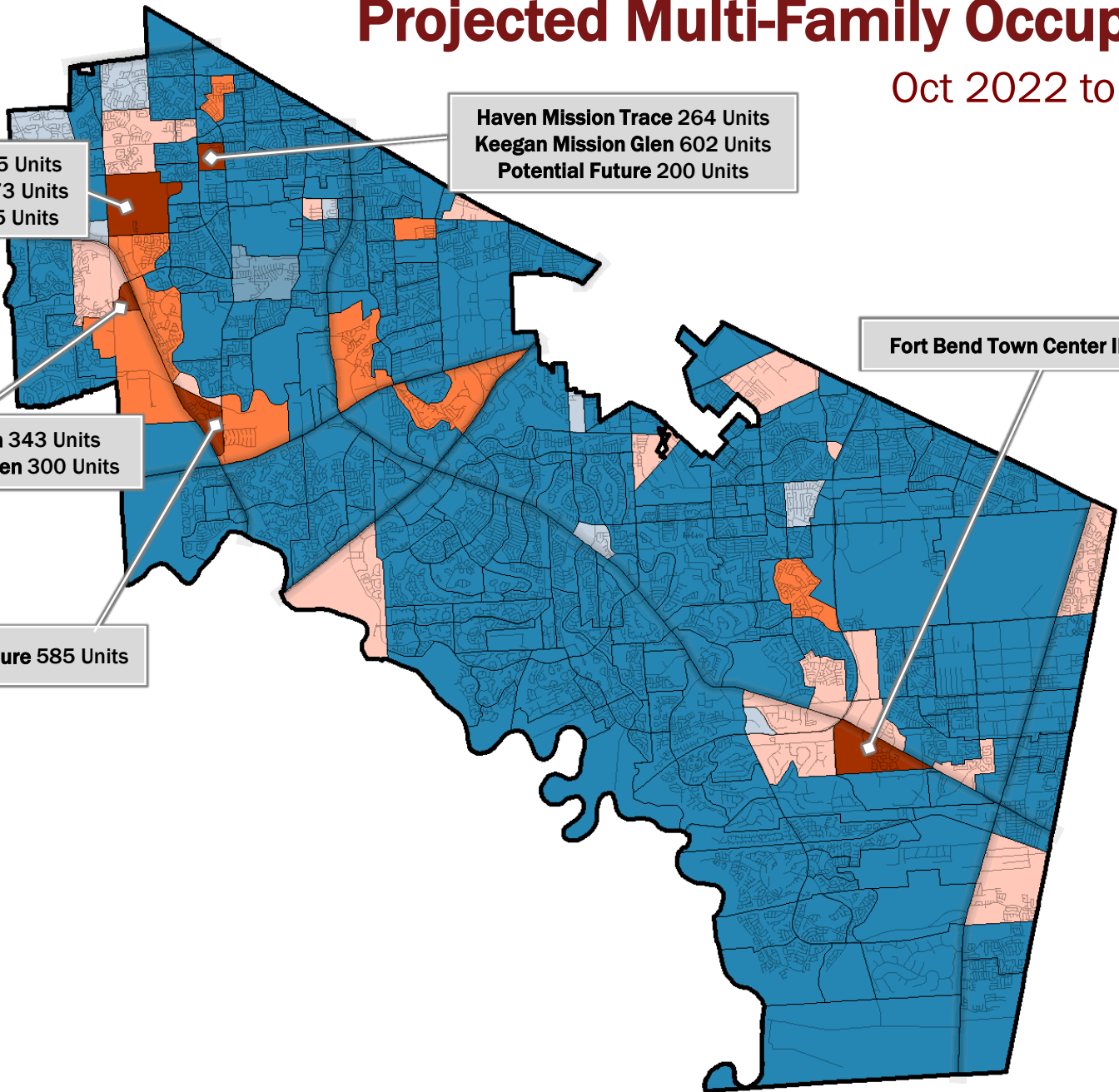
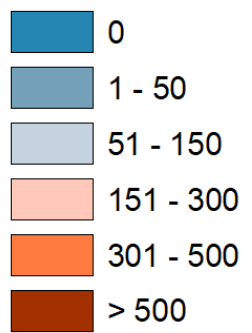
Richmond Apts. 245 Units
W. Bellfort Tracts 173 Units
Age-Restricted 155 Units

Haven Mission Trace 264 Units
Keegan Mission Glen 602 Units
Potential Future 200 Units

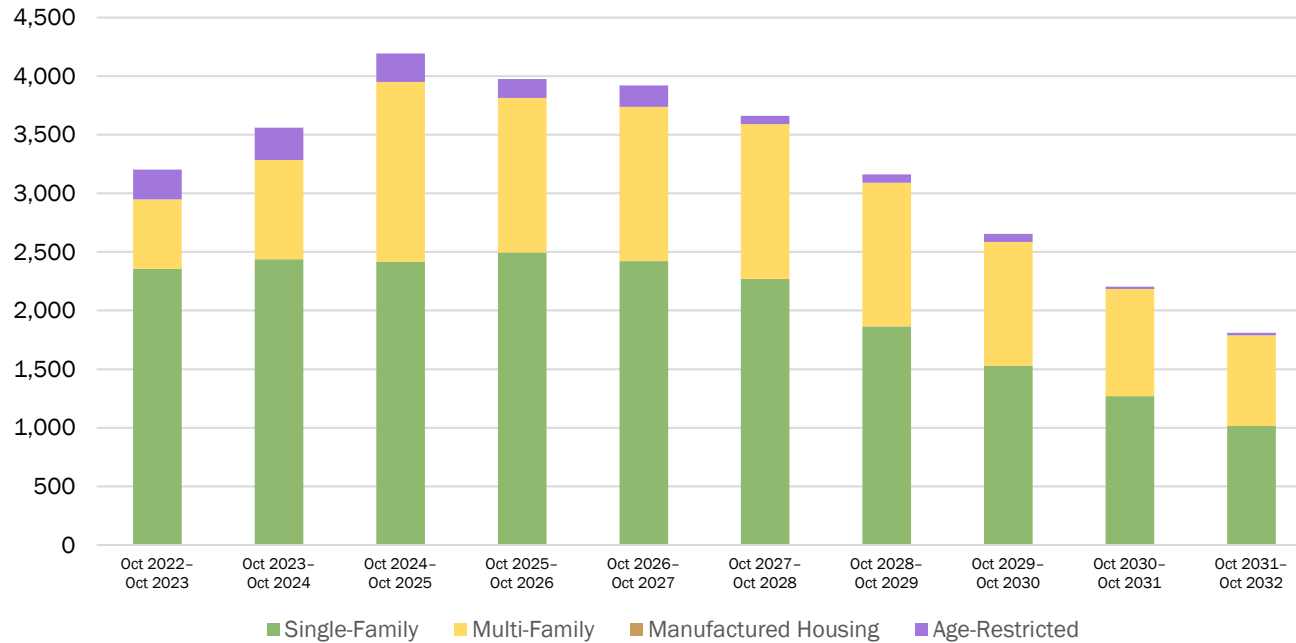
Elan Harvest Green 343 Units
Greystar Harvest Green 300 Units

Fort Bend Town Center III 750 Units

Potential Future 585 Units



New Housing Projections by Year of Occupancy



Housing Type	Oct 2022–Oct 2023	Oct 2023–Oct 2024	Oct 2024–Oct 2025	Oct 2025–Oct 2026	Oct 2026–Oct 2027	Oct 2027–Oct 2028	Oct 2028–Oct 2029	Oct 2029–Oct 2030	Oct 2030–Oct 2031	Oct 2031–Oct 2032	Oct 2022–Oct 2032
Single-Family	2,357	2,439	2,417	2,495	2,423	2,270	1,866	1,529	1,269	1,015	20,080
Multi-Family	591	845	1,533	1,320	1,314	1,321	1,225	1,056	914	774	10,893
Manufactured Housing	0	0	0	0	0	0	0	0	0	0	0
Age-Restricted	256	277	245	160	185	70	70	70	20	20	1,373
Total	3,204	3,561	4,195	3,975	3,922	3,661	3,161	2,655	2,203	1,809	32,346

STUDENT PROJECTIONS



Factors Incorporated into Student Projections



New Housing Construction

Largest driver of future growth

Birth rates

Changes in birth rates impact KG enrollment five years later

Incoming KG class sizes

Average ~1% annual growth year over year during the last decade (pre-pandemic)

Aging of the existing student population

Accounts for bulges in the population

Regeneration in existing neighborhoods

Where are younger families moving in to replace empty-nesters?

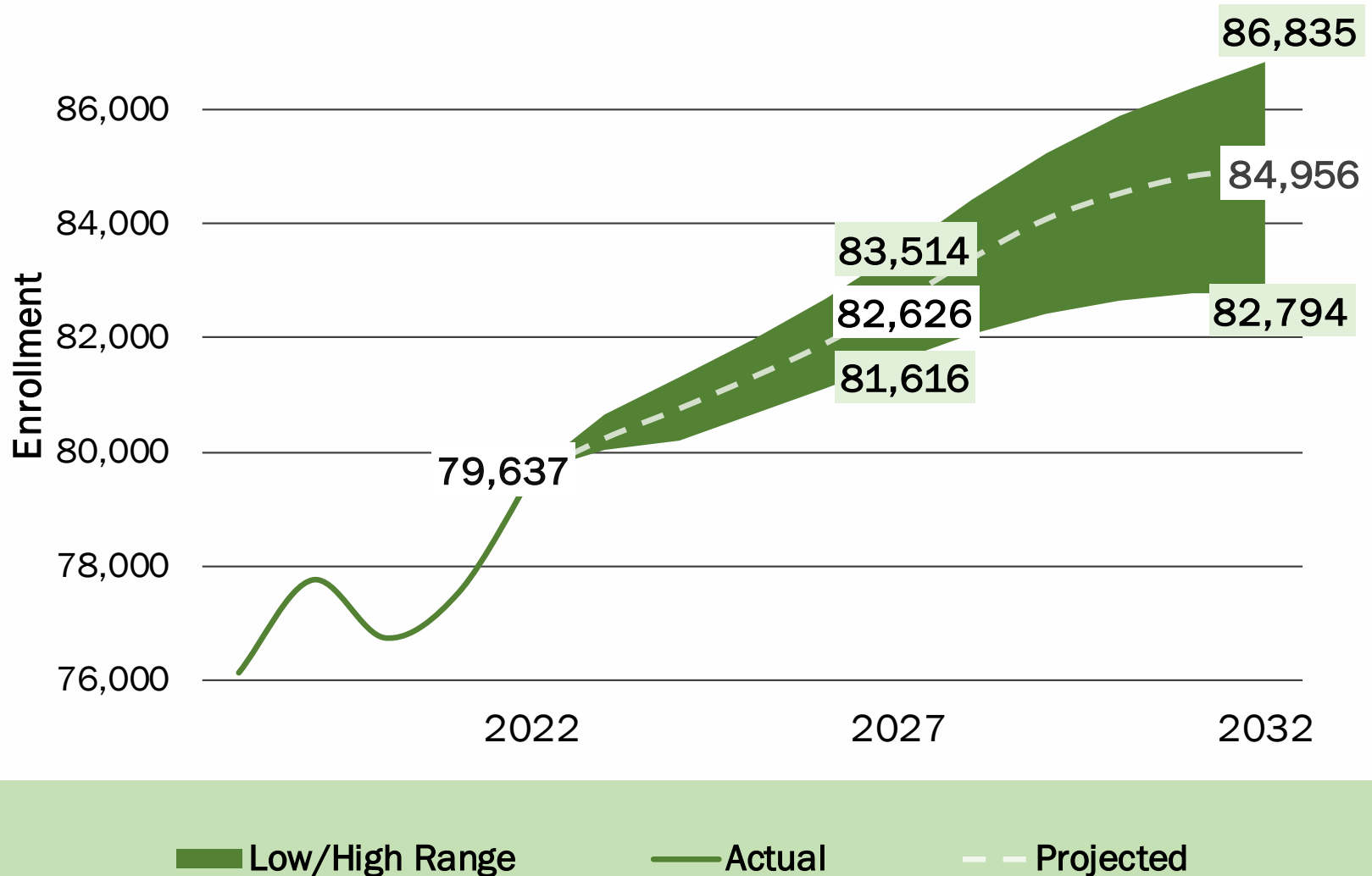
New Charter Schools

Five new charter campuses expected in the next 1-3 years

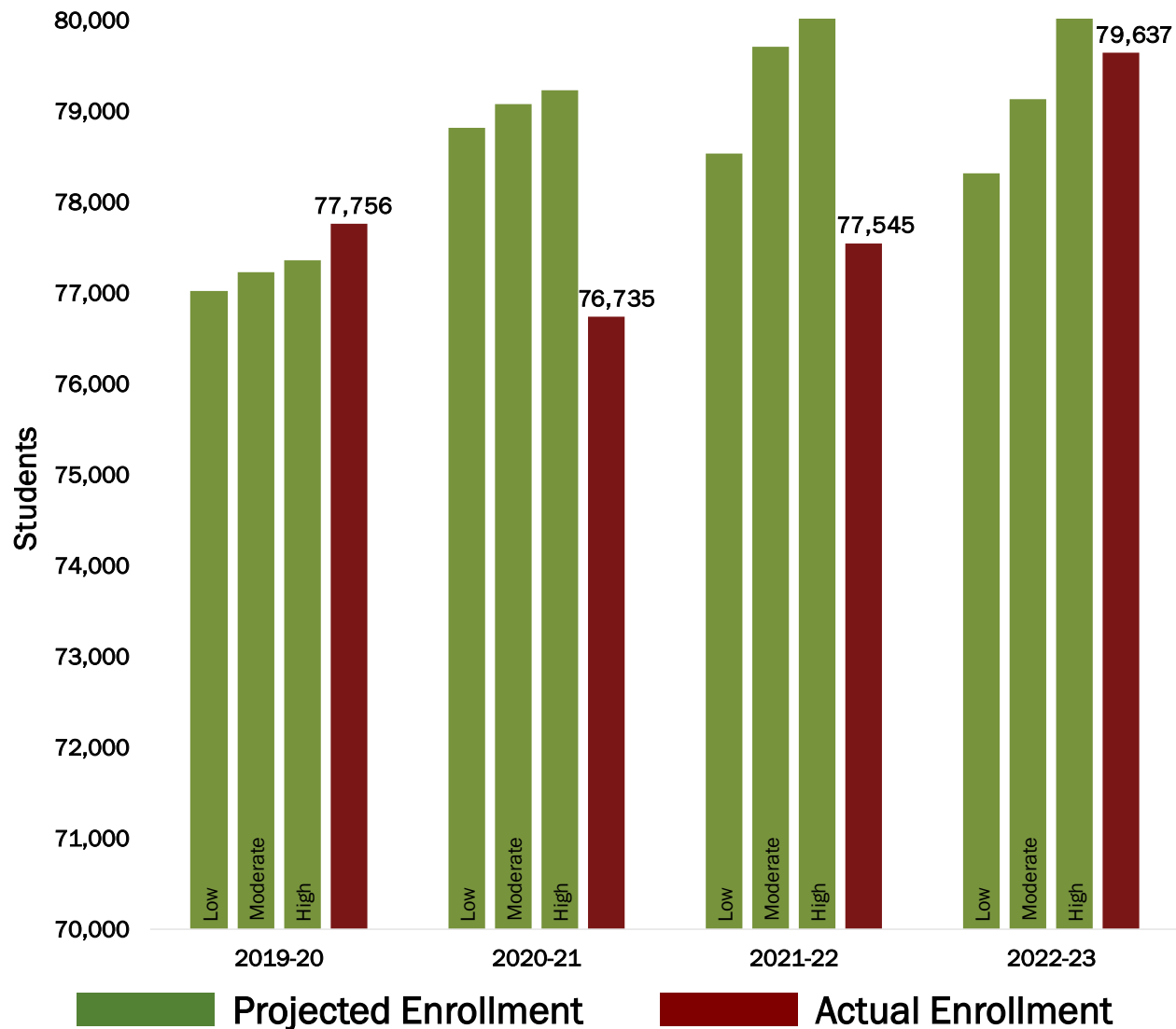
Pandemic Related Loss

No more assumptions of recapture

Three Scenarios of Growth



Historical Projections vs. Enrollment

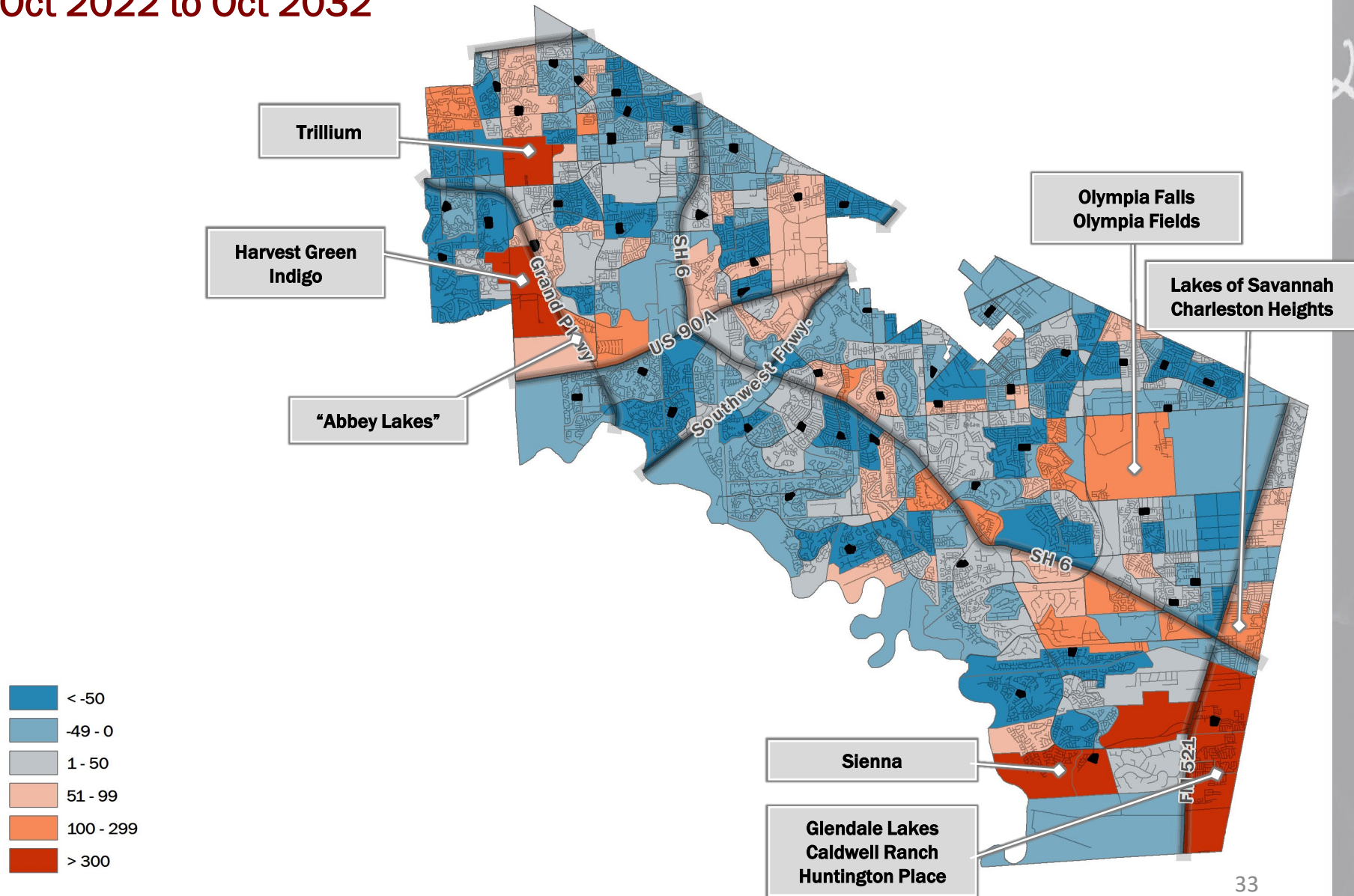


LONG-RANGE PLANNING



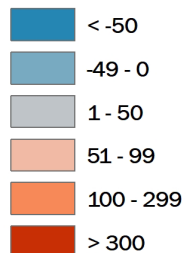
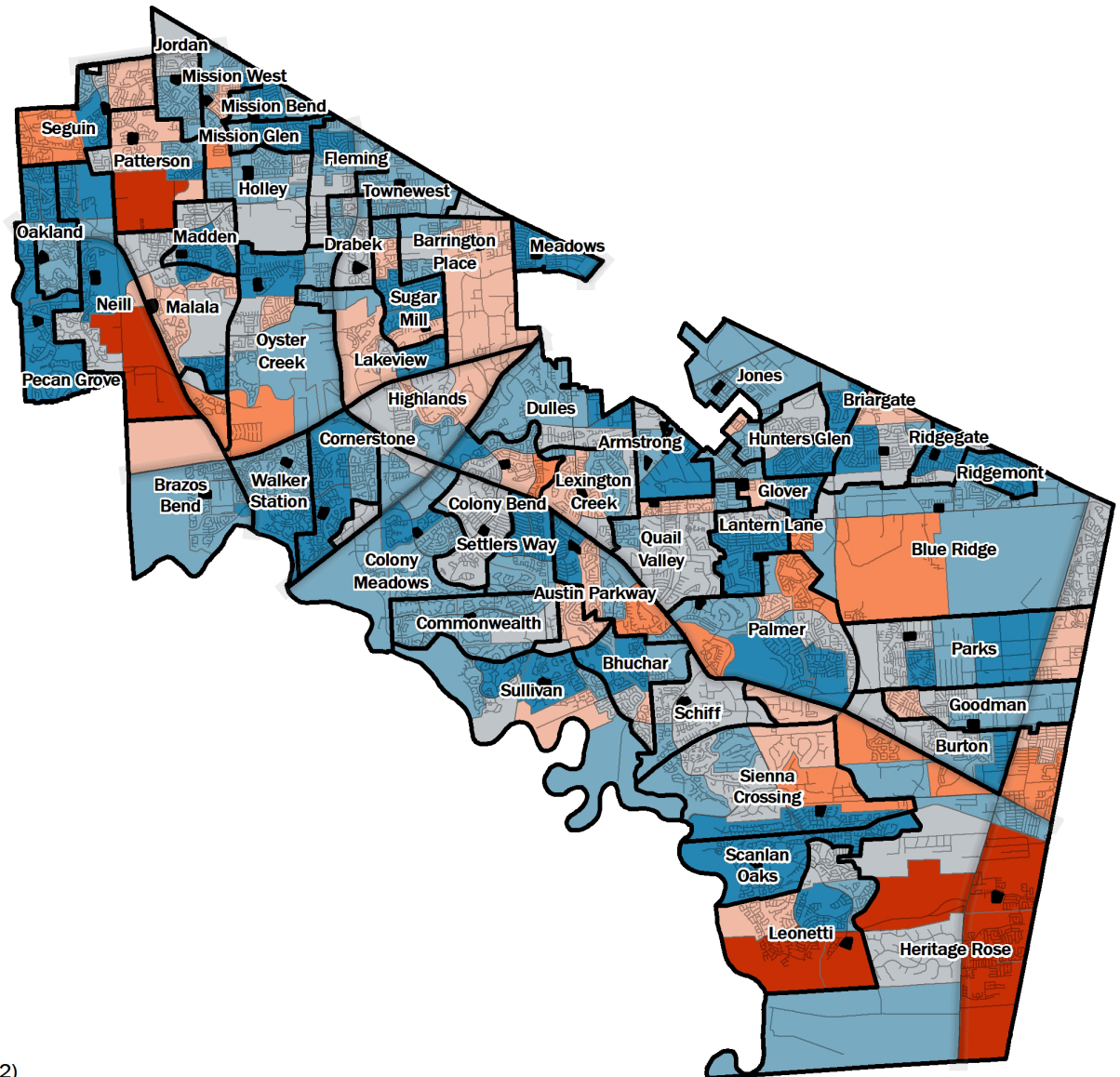
Projected Growth in Elementary Students

Oct 2022 to Oct 2032

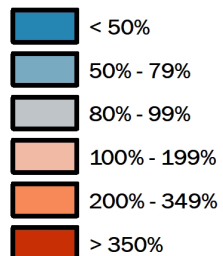


Projected Growth in Elementary Students

Oct 2022 to Oct 2032



Elem Attendance Zones 2023-24 (as of Dec 2022)

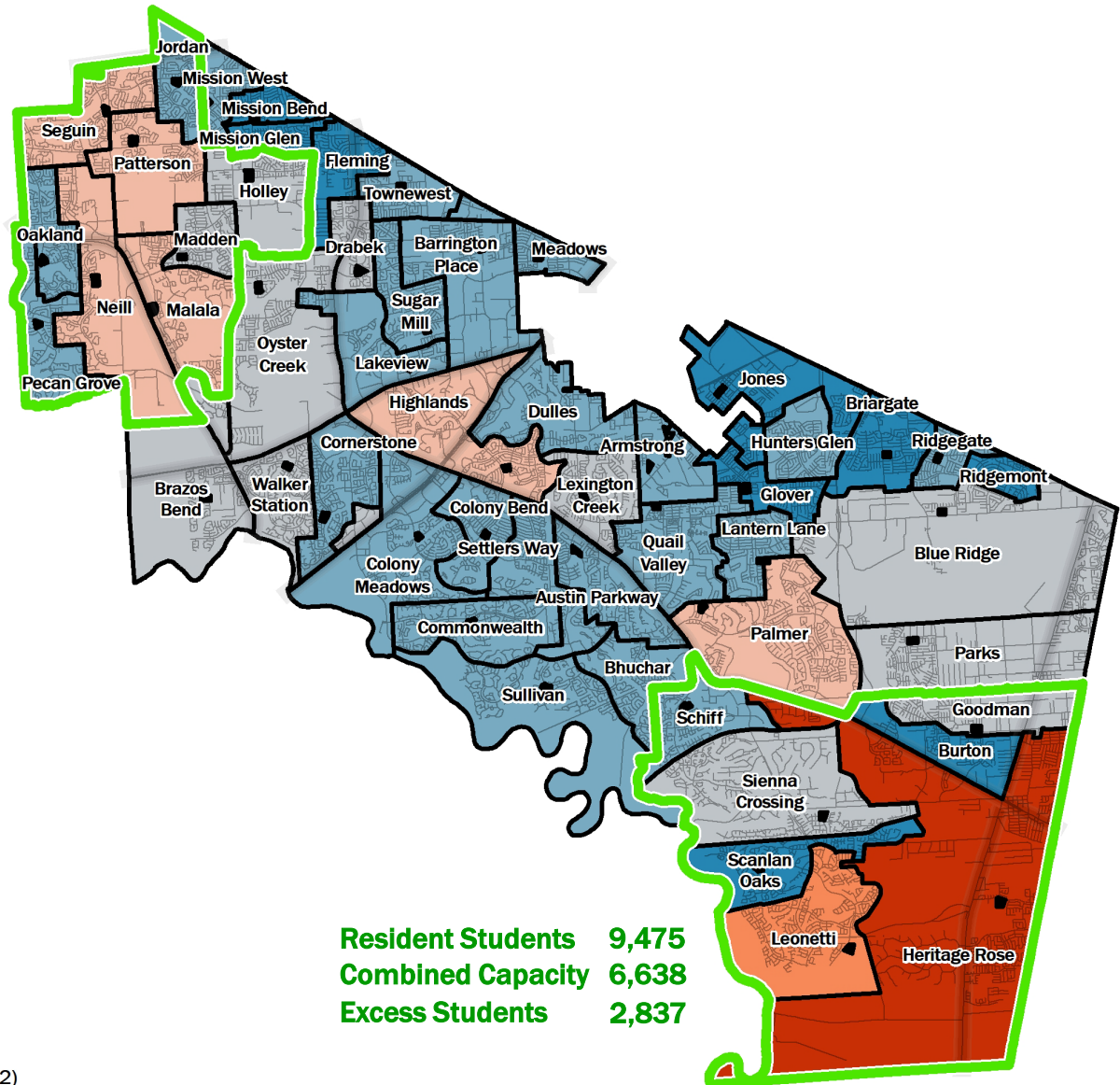


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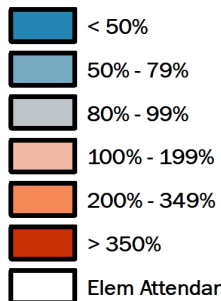
Elementary Long-Range Planning 2032-33



Resident Students 8,499
Combined Capacity 8,299
Excess Students 150

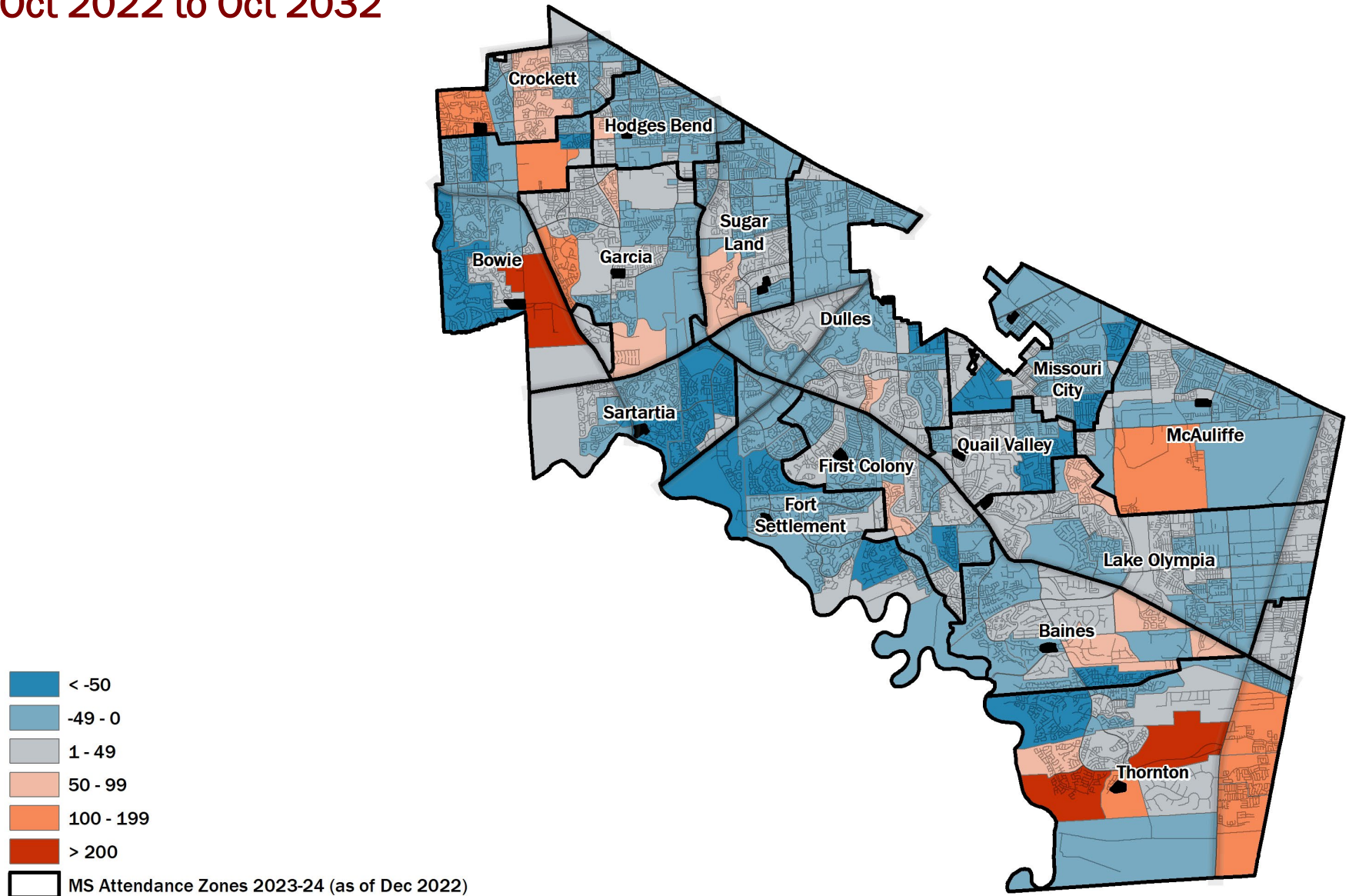


Resident Students 9,475
Combined Capacity 6,638
Excess Students 2,837

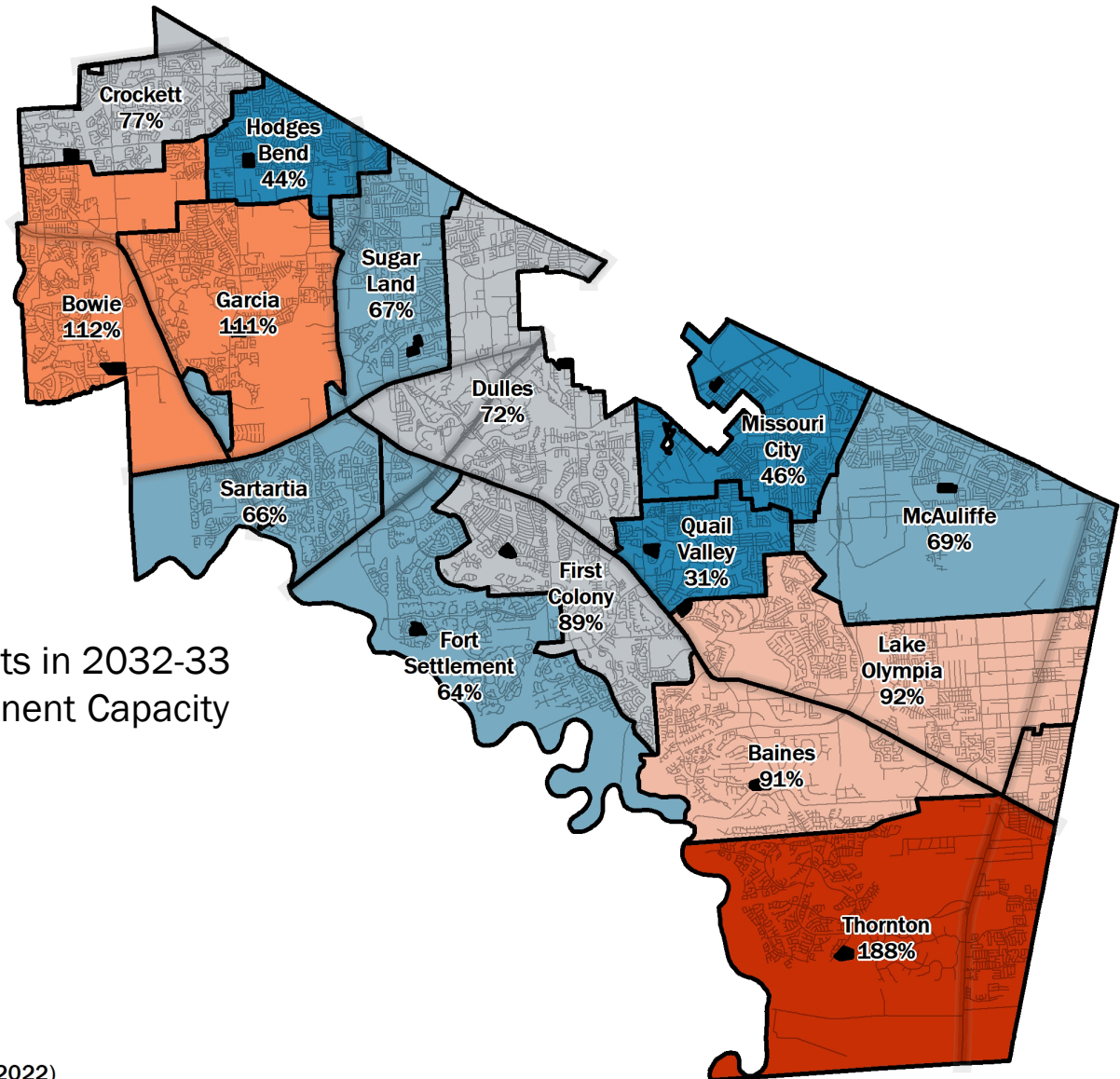


Projected Growth in Middle School Students

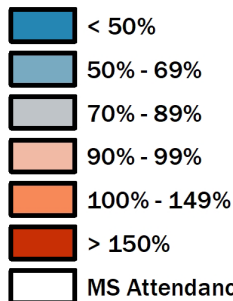
Oct 2022 to Oct 2032



Projected Middle School Utilization 2032-33



Projected RESIDENT Students in 2032-33
Compared to Current Permanent Capacity

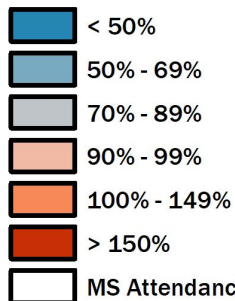
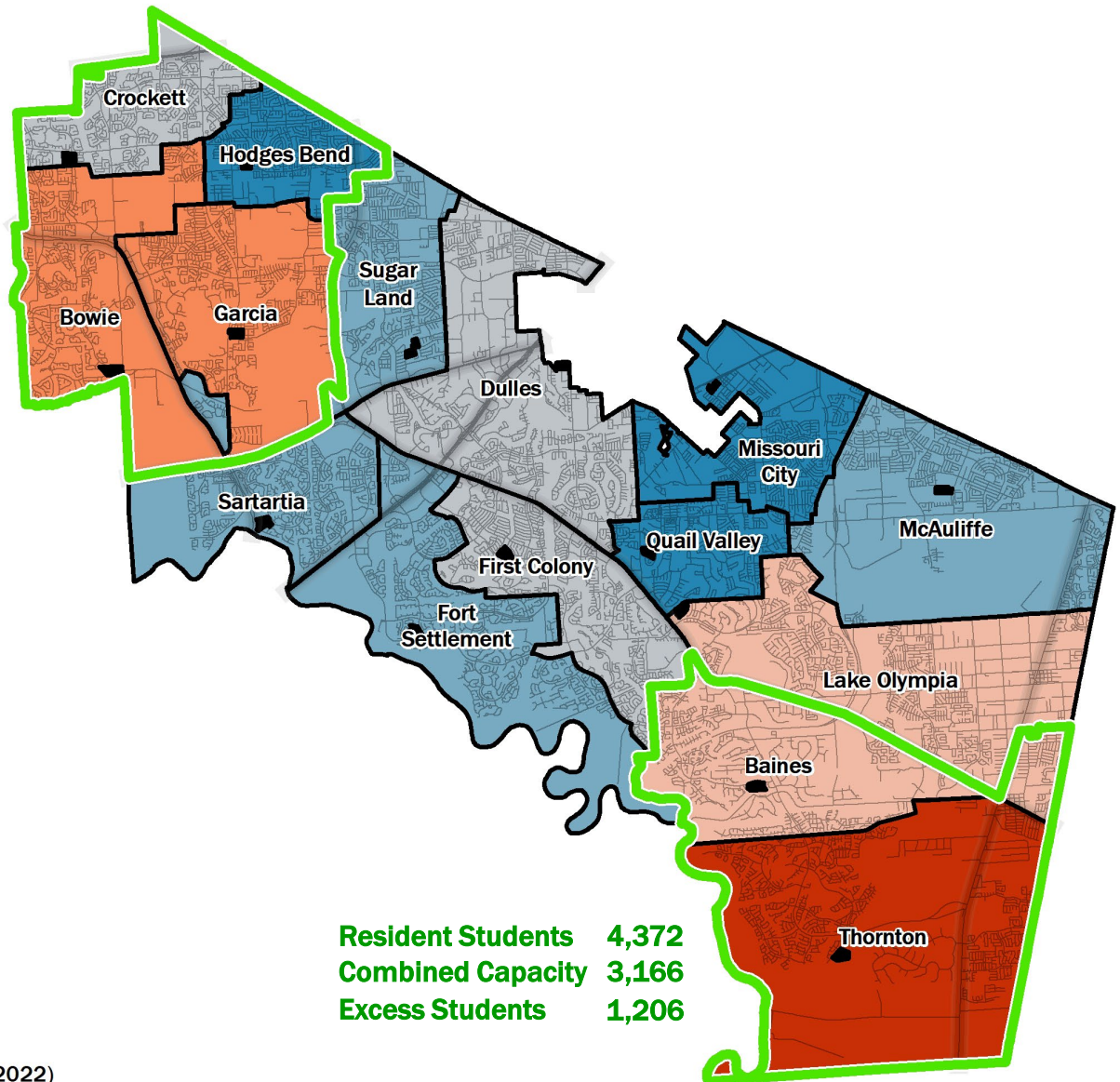


Middle School Long-Range Planning

2032-33



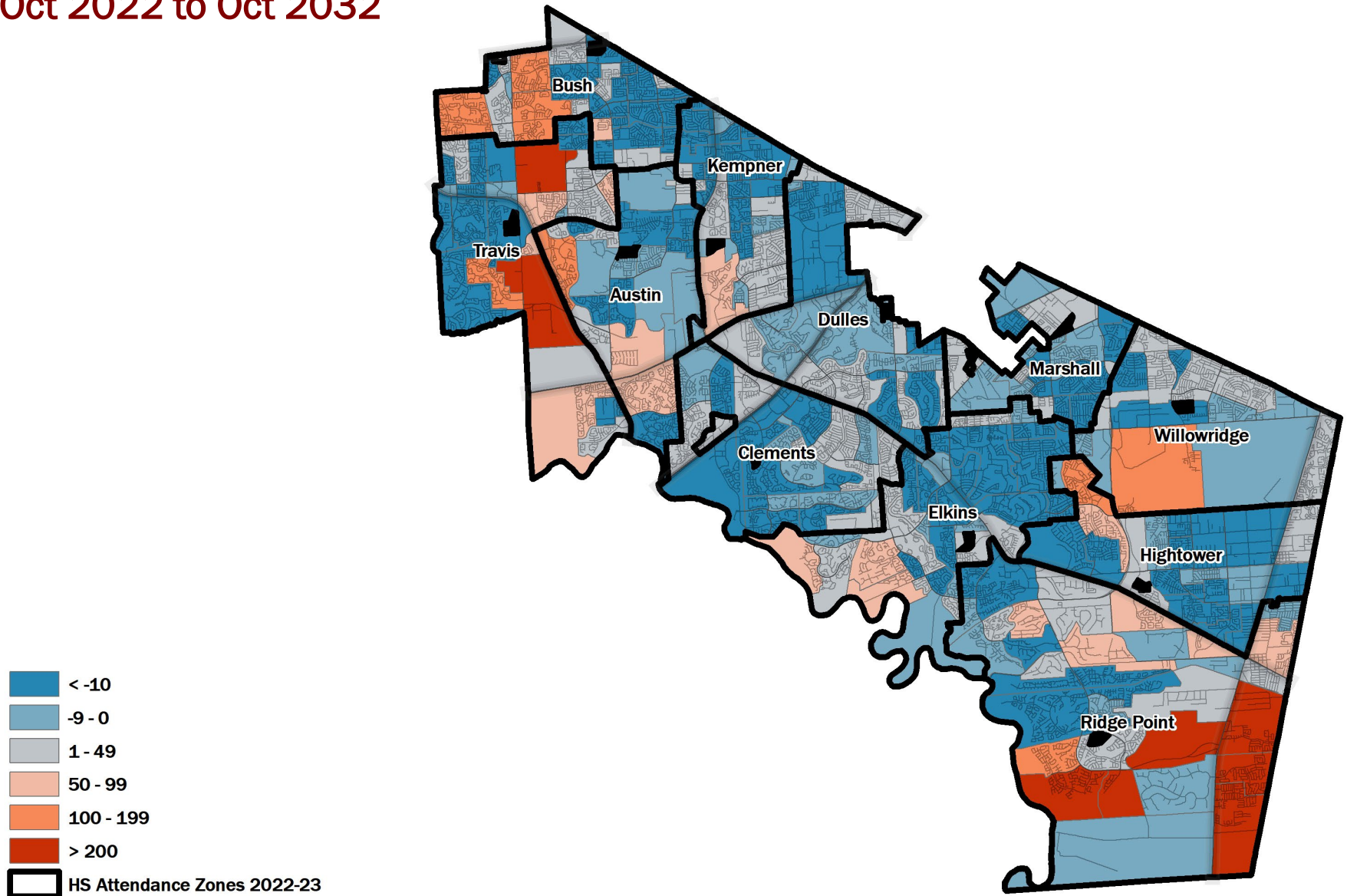
Resident Students 5,563
Combined Capacity 6,342
Excess Capacity 779



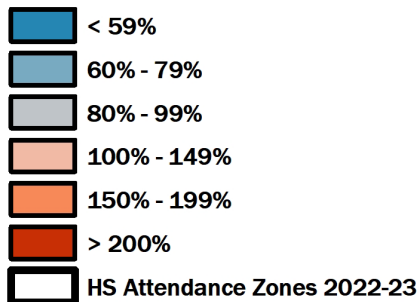
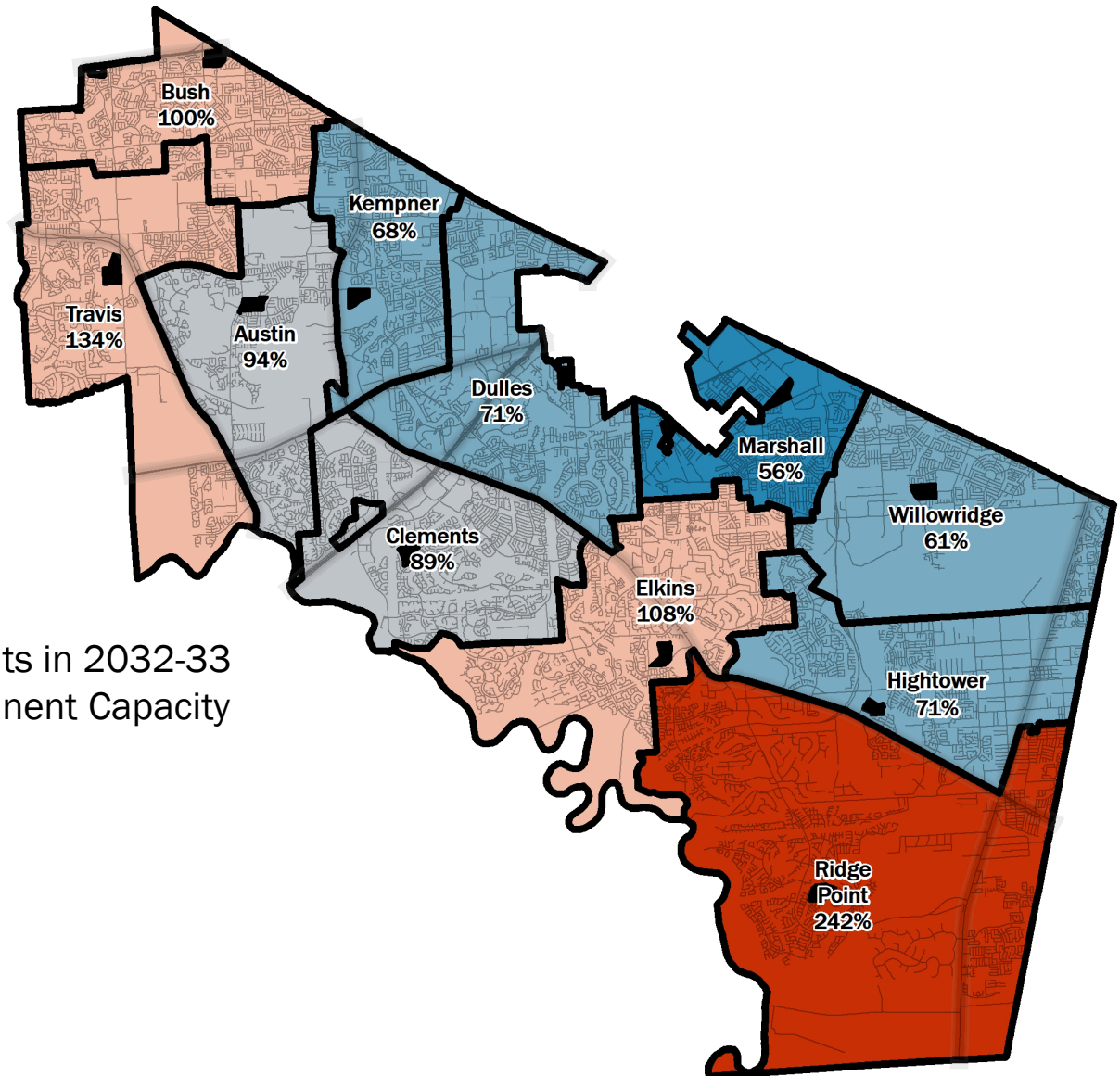
Resident Students 4,372
Combined Capacity 3,166
Excess Students 1,206

Projected Growth in High School Students

Oct 2022 to Oct 2032



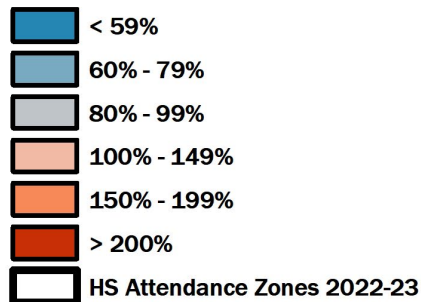
Projected High School Utilization 2032-33



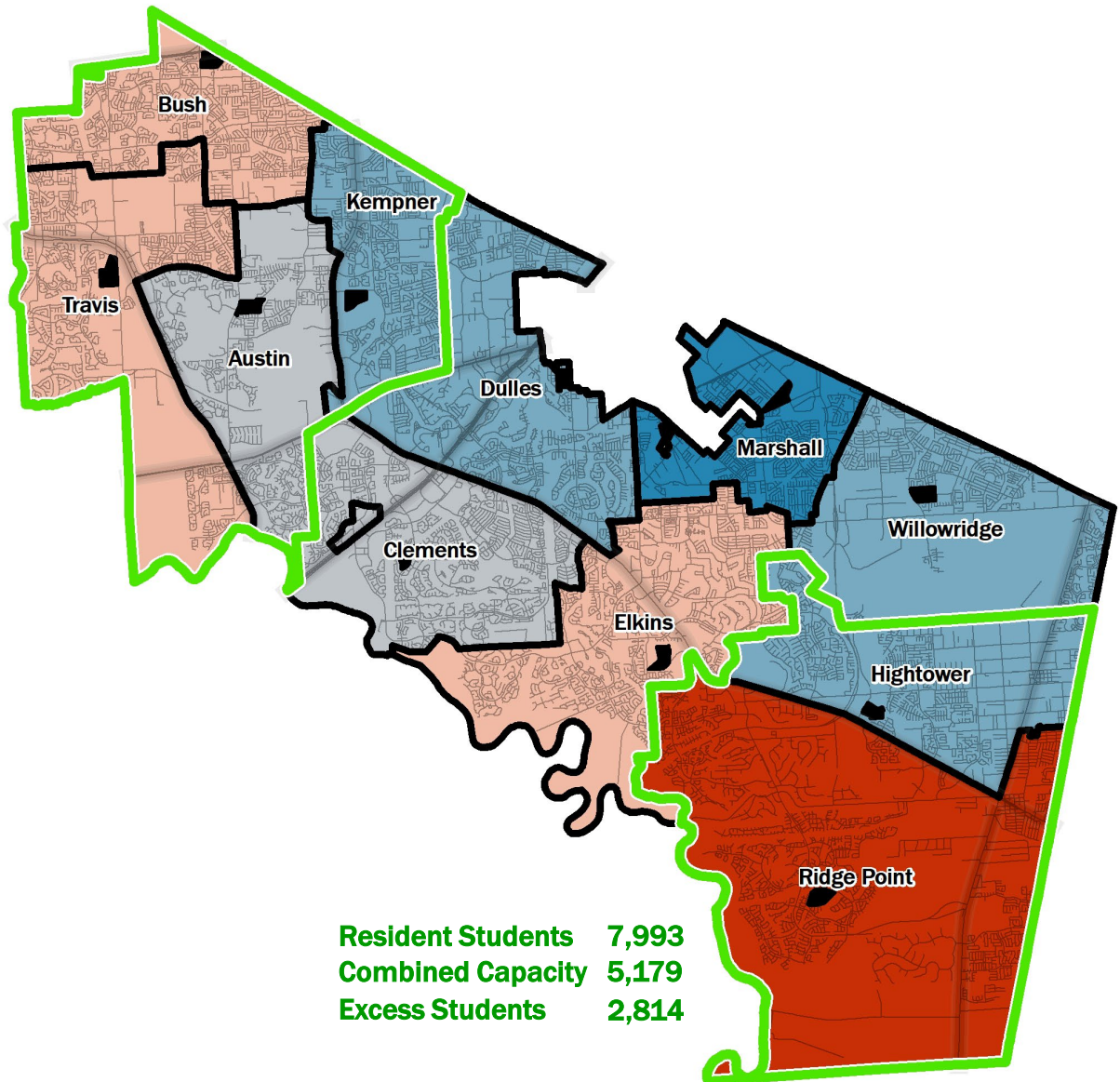
High School Long-Range Planning 2032-33



Resident Students 10,825
Combined Capacity 10,859
Excess Students 34



Resident Students 7,993
Combined Capacity 5,179
Excess Students 2,814



QUESTIONS?





FORT BEND ISD

DEMOGRAPHIC STUDY

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