



Judson ISD

District
Demographics
Update

2021 / 22

Growth & Planning Meeting
April 25, 2022



School District Strategies
Solutions Through Demographics



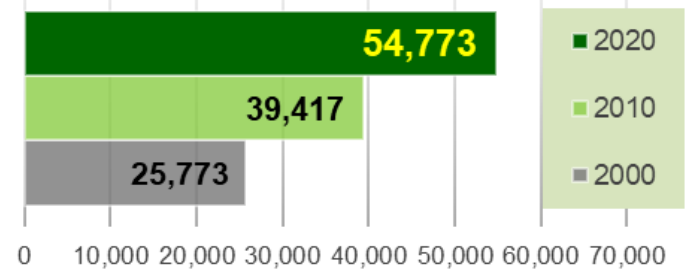
JUDSON ISD: 2020 CENSUS INITIAL RESULTS

- Judson ISD's overall population in 2020 was 147,351 (+29.3% or +33,365 vs. 2010)
- As of the 2020 Census, the district had 54,773 total households, an increase of 39% over the past decade (+15,356 vs. 2010 Census)
- From 2010-2020, the district's overall population increased at an average rate near 3% per year; Household growth was faster at an average of 3.9%
- 2020 Census results showed that the district's population under age 18 increased by 15.8% over the past decade to 39,455
- 26.8% of the overall population in JISD is under the age of 18, down from 29.9% in 2010

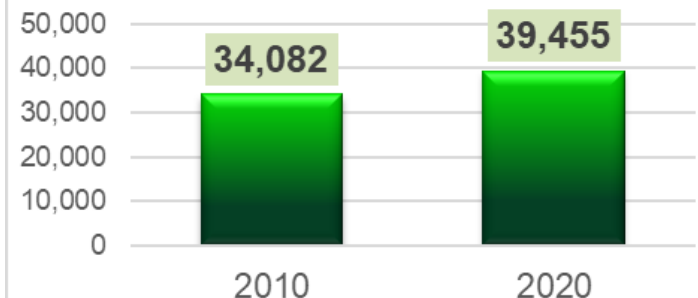
OVERALL POPULATION



TOTAL HOUSEHOLDS

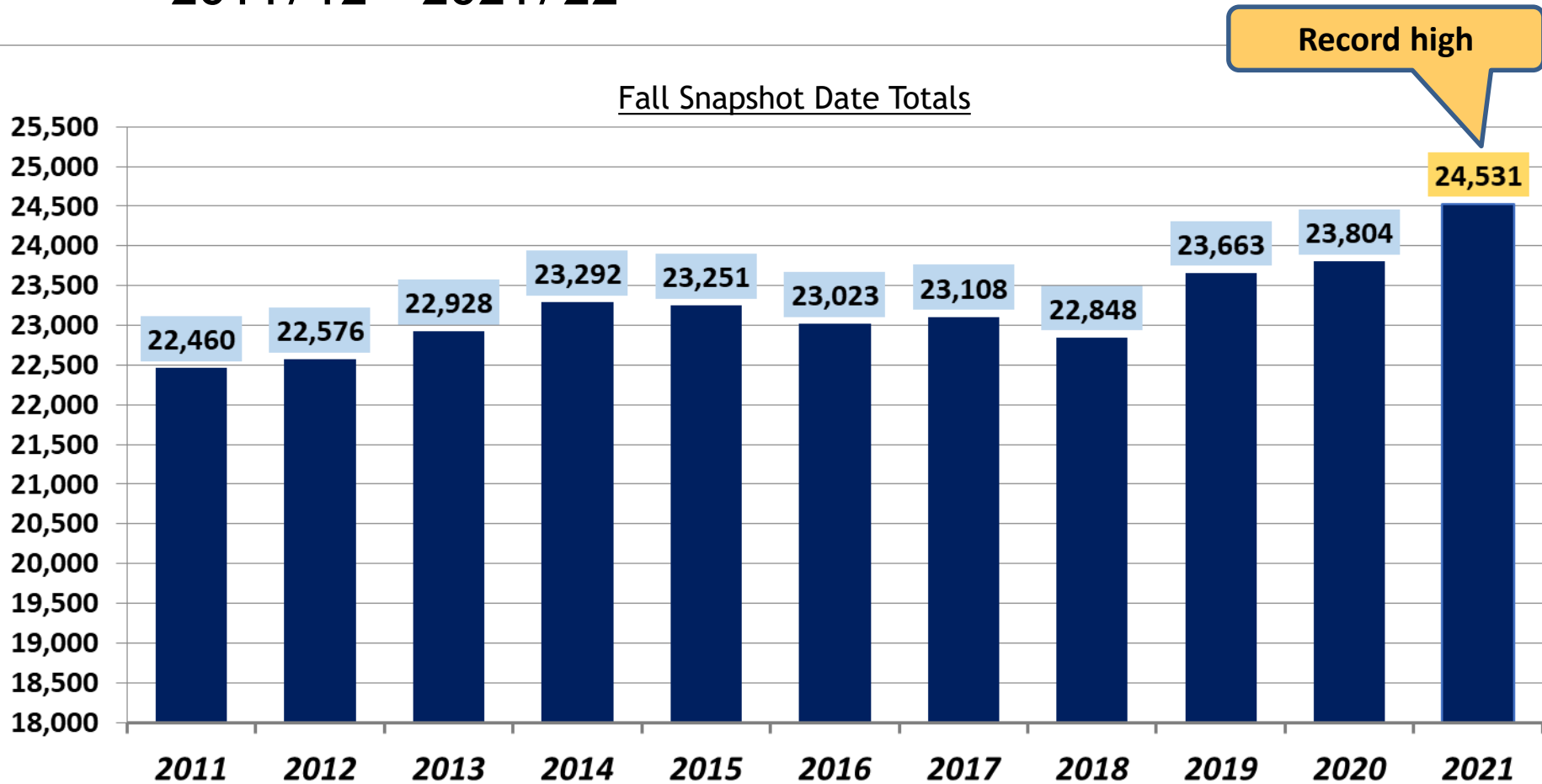


POPULATION UNDER AGE 18





JUDSON ISD ENROLLMENT HISTORY (PK-12): 2011/12 - 2021/22



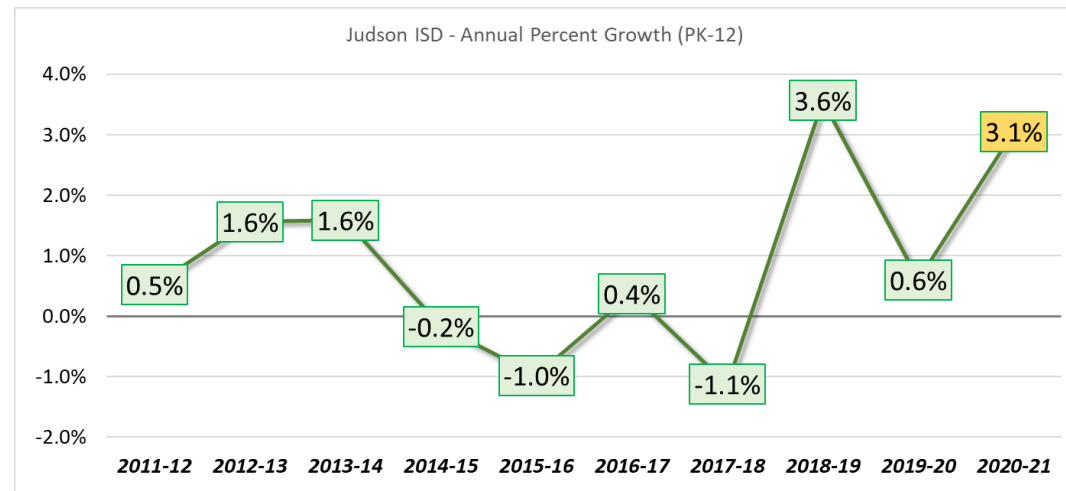
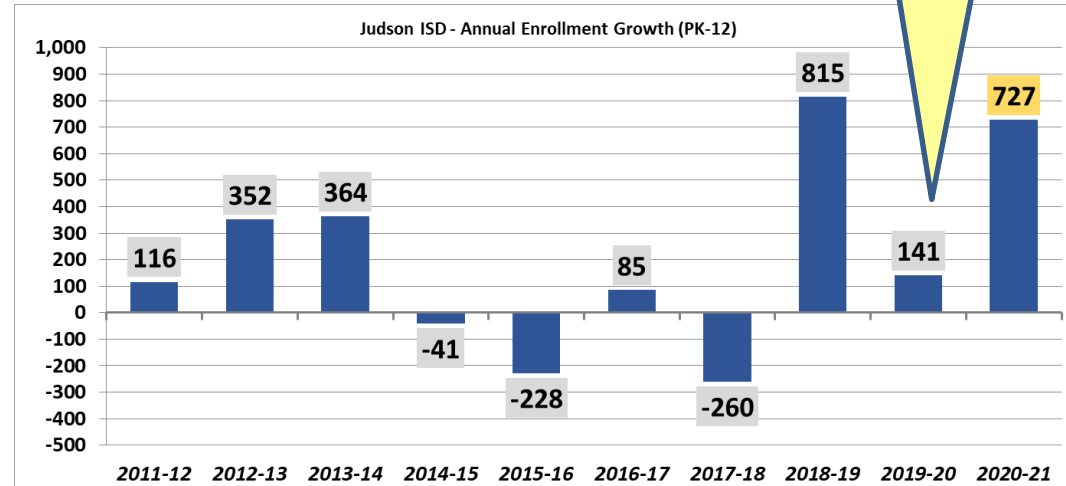
- District enrollment as of the October 2021 snapshot was a record 24,531 students



JUDSON ISD ENROLLMENT HISTORY: ANNUAL GROWTH 2011/12 - 2021/22

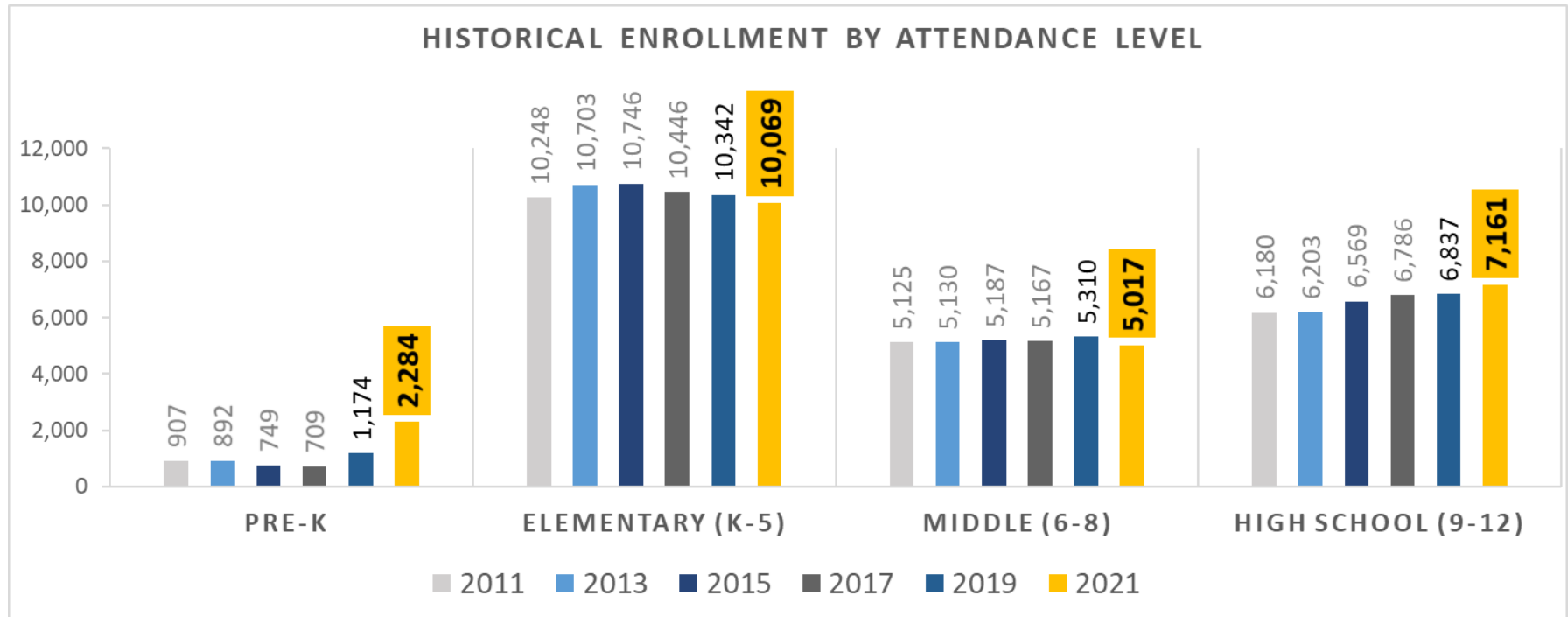
COVID-19
Pandemic Impact

- COVID-19 environment slows JISD's pace of enrollment growth from 2019 to 2020, unlike many other districts in Texas that lost 2-4% of previously enrolled students
- District enrollment increased by 727 students from 2020 to 2021 (+3.1%)
- JISD enrollment has grown 7 out of the past 10 years
- Over the past 3 years the district has averaged 2.4% annual growth
- Over the past 5 years, JISD has averaged 1.3% annual growth





JUDSON ISD ENROLLMENT HISTORY: GROWTH BY ATTENDANCE LEVEL: 2011/12 - 2021/22



Enrollment totals shown in 2-year increments



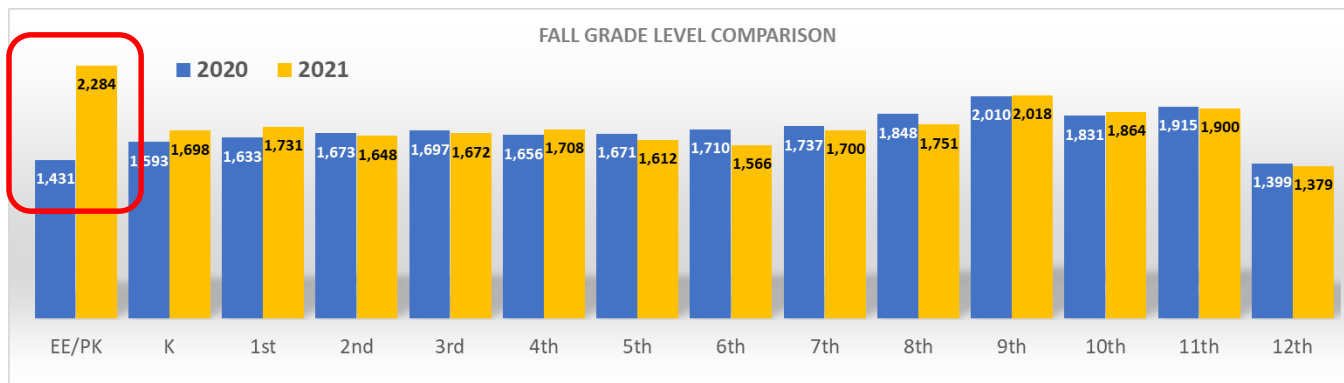
JUDSON ISD ENROLLMENT HISTORY: GROWTH BY GRADE LEVEL



 = Record class size

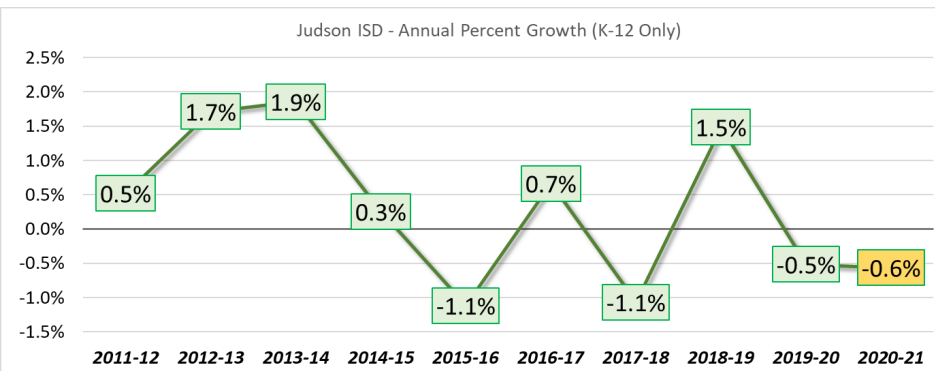
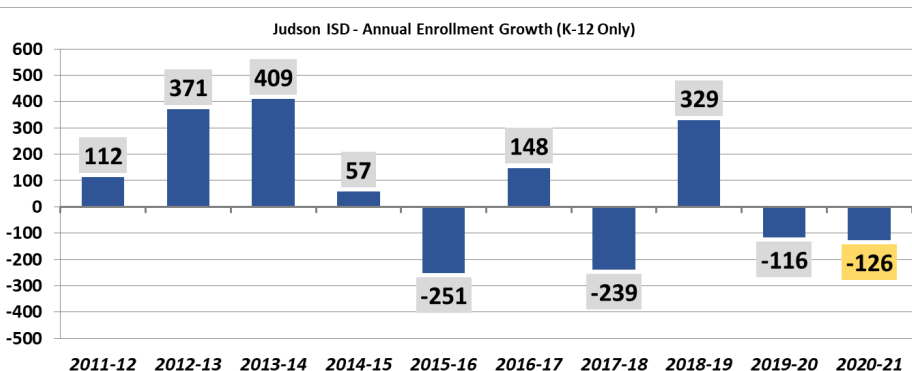
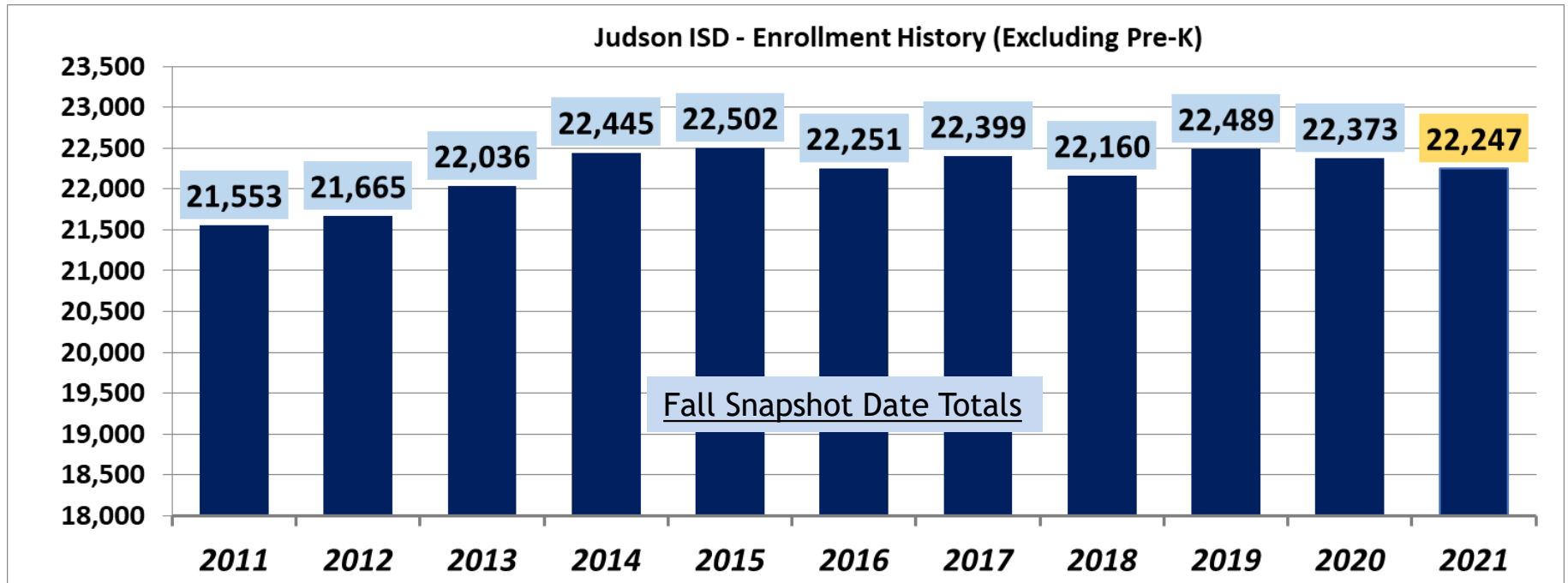
 = Record district enrollment

	ELEMENTARY							MIDDLE			HIGH						
Year (Fall)	EE/PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	District Total	Annual Growth	Percent Change
2005	487	1,480	1,442	1,545	1,479	1,398	1,614	1,539	1,539	1,545	1,906	1,215	1,231	798	19,218		
2006	498	1,480	1,641	1,531	1,634	1,560	1,535	1,609	1,608	1,594	2,120	1,277	1,201	954	20,242	1,024	5.3%
2007	576	1,495	1,666	1,713	1,543	1,636	1,610	1,469	1,613	1,603	2,024	1,383	1,278	992	20,601	359	1.8%
2008	604	1,582	1,678	1,708	1,739	1,634	1,730	1,620	1,552	1,636	2,013	1,430	1,169	1,161	21,256	655	3.2%
2009	736	1,621	1,734	1,712	1,693	1,743	1,683	1,692	1,594	1,628	1,730	1,561	1,409	1,159	21,695	439	2.1%
2010	758	1,639	1,745	1,689	1,688	1,710	1,743	1,623	1,687	1,634	1,669	1,603	1,565	1,263	22,016	321	1.5%
2011	907	1,642	1,744	1,739	1,710	1,713	1,700	1,752	1,650	1,723	1,905	1,591	1,568	1,116	22,460	444	2.0%
2012	911	1,764	1,745	1,776	1,717	1,680	1,697	1,674	1,733	1,652	2,199	1,626	1,302	1,100	22,576	116	0.5%
2013	892	1,769	1,902	1,754	1,820	1,720	1,738	1,667	1,687	1,776	1,814	1,683	1,574	1,132	22,928	352	1.6%
2014	847	1,732	1,830	1,866	1,818	1,776	1,821	1,700	1,680	1,740	1,954	1,651	1,784	1,093	23,292	364	1.6%
2015	749	1,607	1,808	1,871	1,862	1,803	1,795	1,753	1,716	1,718	1,908	1,770	1,819	1,072	23,251	-41	-0.2%
2016	772	1,539	1,695	1,766	1,824	1,886	1,814	1,660	1,746	1,715	1,975	1,714	1,901	1,016	23,023	-228	-1.0%
2017	709	1,568	1,627	1,700	1,791	1,832	1,928	1,728	1,686	1,753	1,986	1,798	1,841	1,161	23,108	85	0.4%
2018	688	1,537	1,671	1,679	1,701	1,830	1,799	1,776	1,770	1,612	1,957	1,801	1,903	1,124	22,848	-260	-1.1%
2019	1,174	1,650	1,688	1,694	1,736	1,720	1,854	1,741	1,791	1,778	1,908	1,816	1,849	1,264	23,663	815	3.6%
2020	1,431	1,593	1,633	1,673	1,697	1,656	1,671	1,710	1,737	1,848	2,010	1,831	1,915	1,399	23,804	141	0.6%
2021	2,284	1,698	1,731	1,648	1,672	1,708	1,612	1,566	1,700	1,751	2,018	1,864	1,900	1,379	24,531	727	3.1%





JUDSON ISD ENROLLMENT HISTORY (K-12 ONLY): 2011/12 - 2021/22

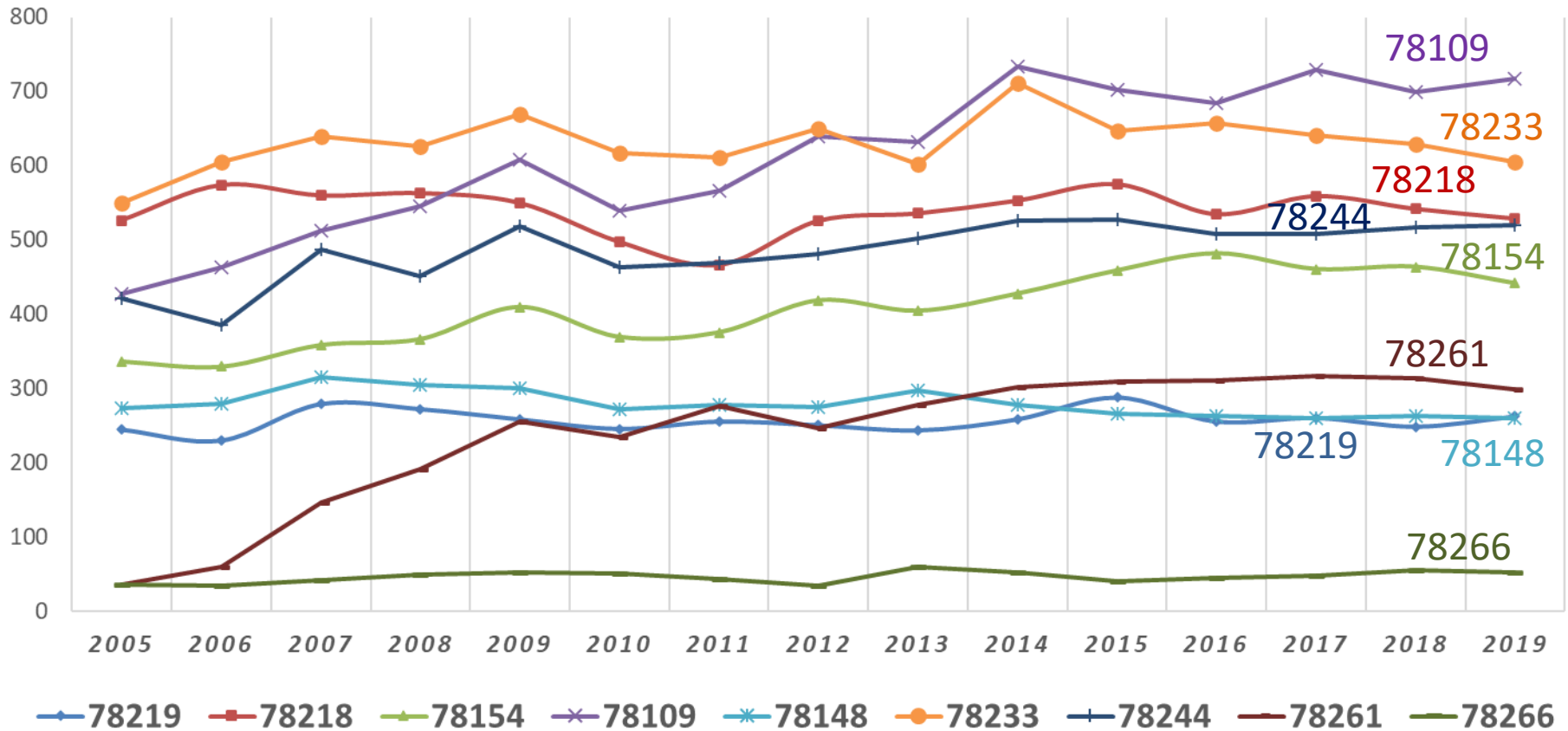


10-Yr Average annual growth for K-12 = +0.3%; 5-Yr Average is flat



LOCAL BIRTH RATE

LOCAL ZIP CODES - ANNUAL BIRTHS

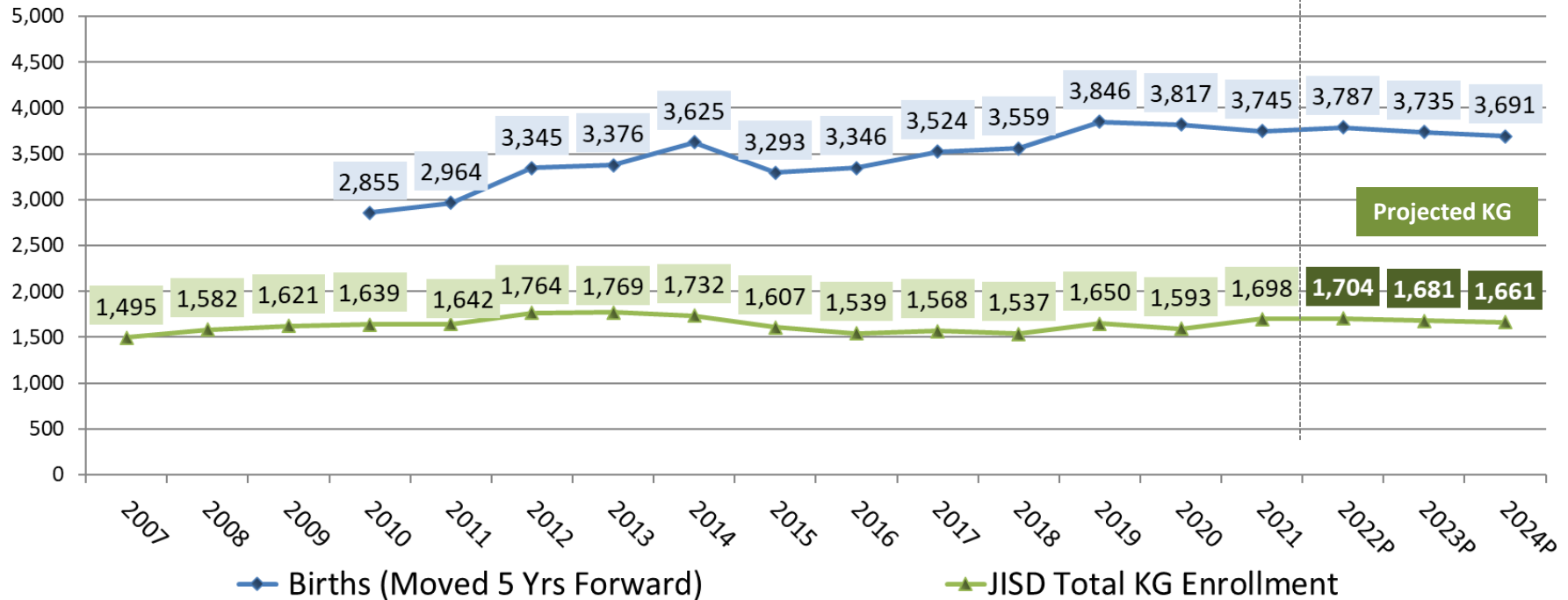


➤ Most area zip codes have seen stable annual birth totals



LOCAL BIRTH COUNTS VS. KINDERGARTEN ENROLLMENT

AREA ANNUAL BIRTH COUNTS VS. JISD KINDERGARTEN (KG) ENROLLMENT



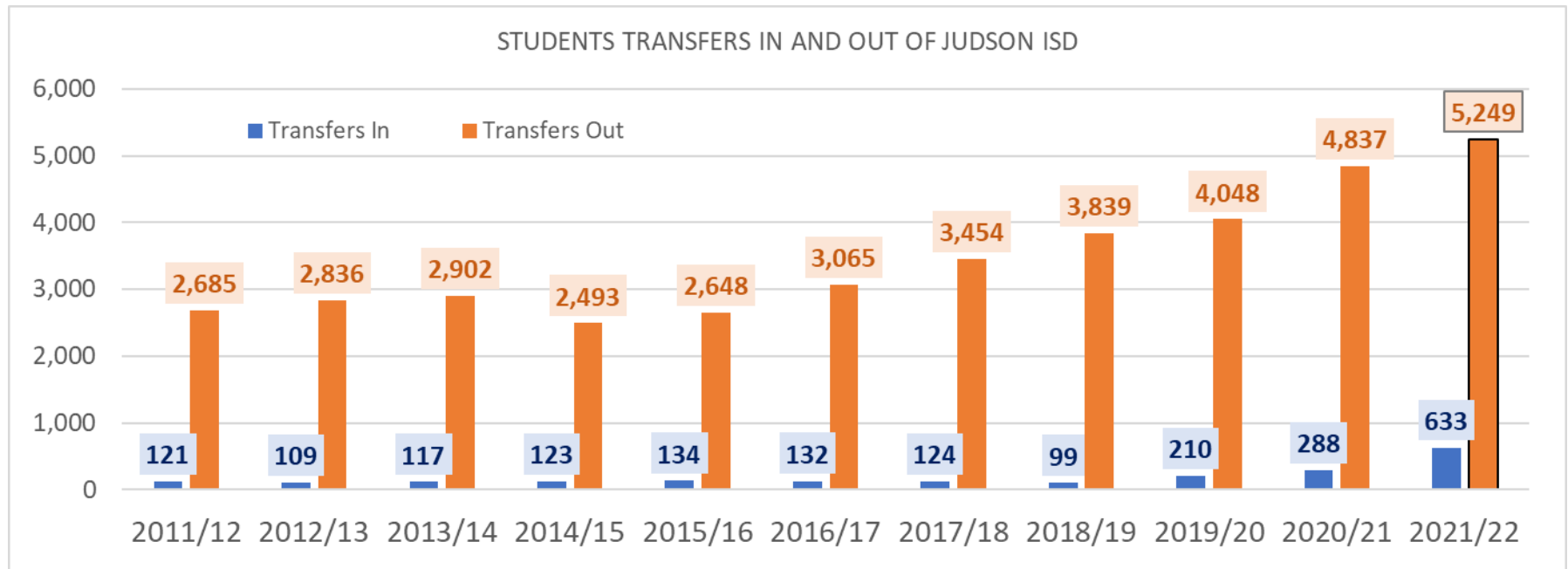
Source: Texas Dept. of State Health Services, JISD

- Area zip codes have produced about 3,600 births per year from 2010-2019
- Birth rate indicates that Judson ISD should see 1,660-1,704 kindergarten students through 2024



JUDSON ISD STUDENT TRANSFERS IN AND OUT OF DISTRICT

PEIMS data reflects counts of students residing in one district and attending another.



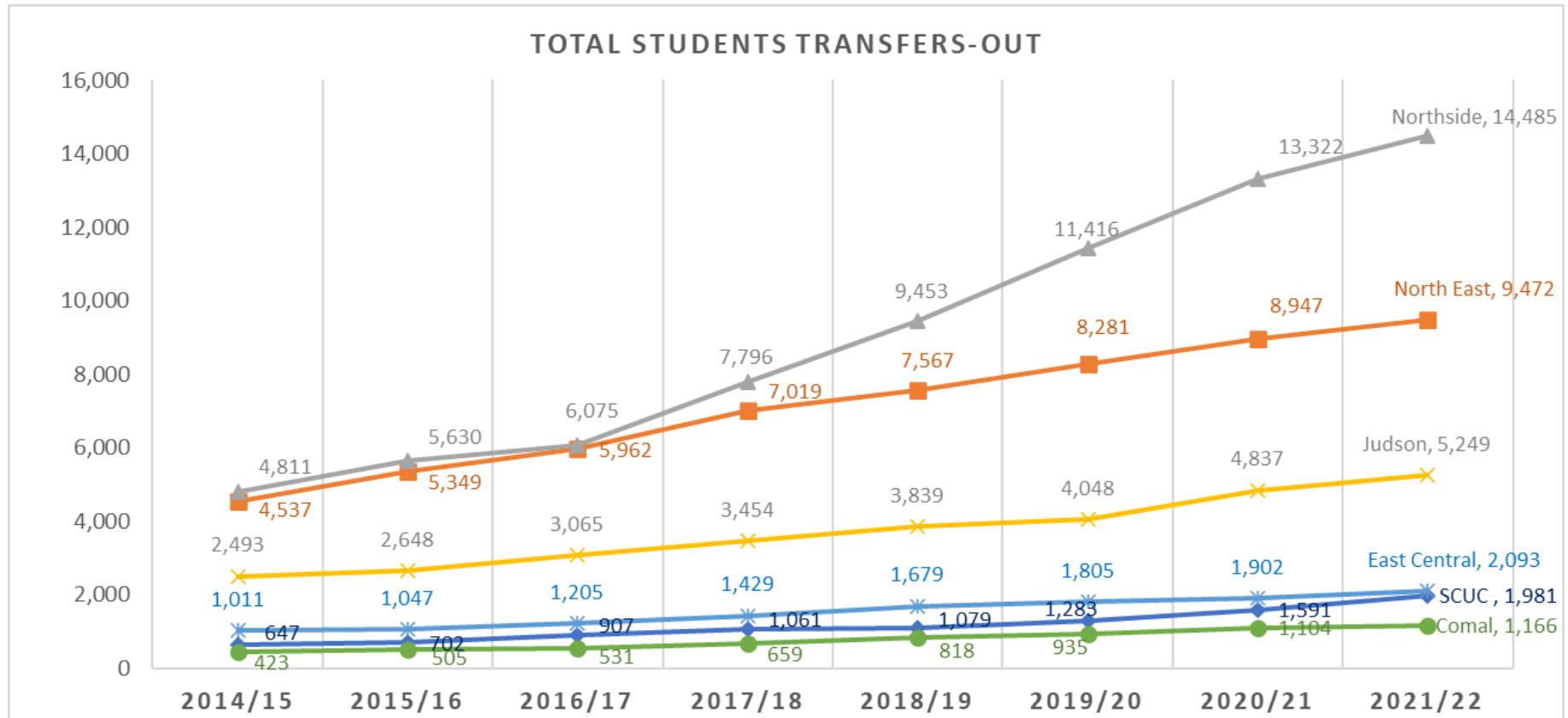
Source: TEA Student Transfers Report

- From 2015/16 to 2021/22, the number of out-of-district transfers has increased by about 2,600 students due to local charter school expansion
- Since 2018/19, the number of students transferring into JISD has increased by 534



JUDSON ISD STUDENT TRANSFERS OUT OF DISTRICT COMPARISON

PEIMS data reflects counts of students residing in one district and attending another.

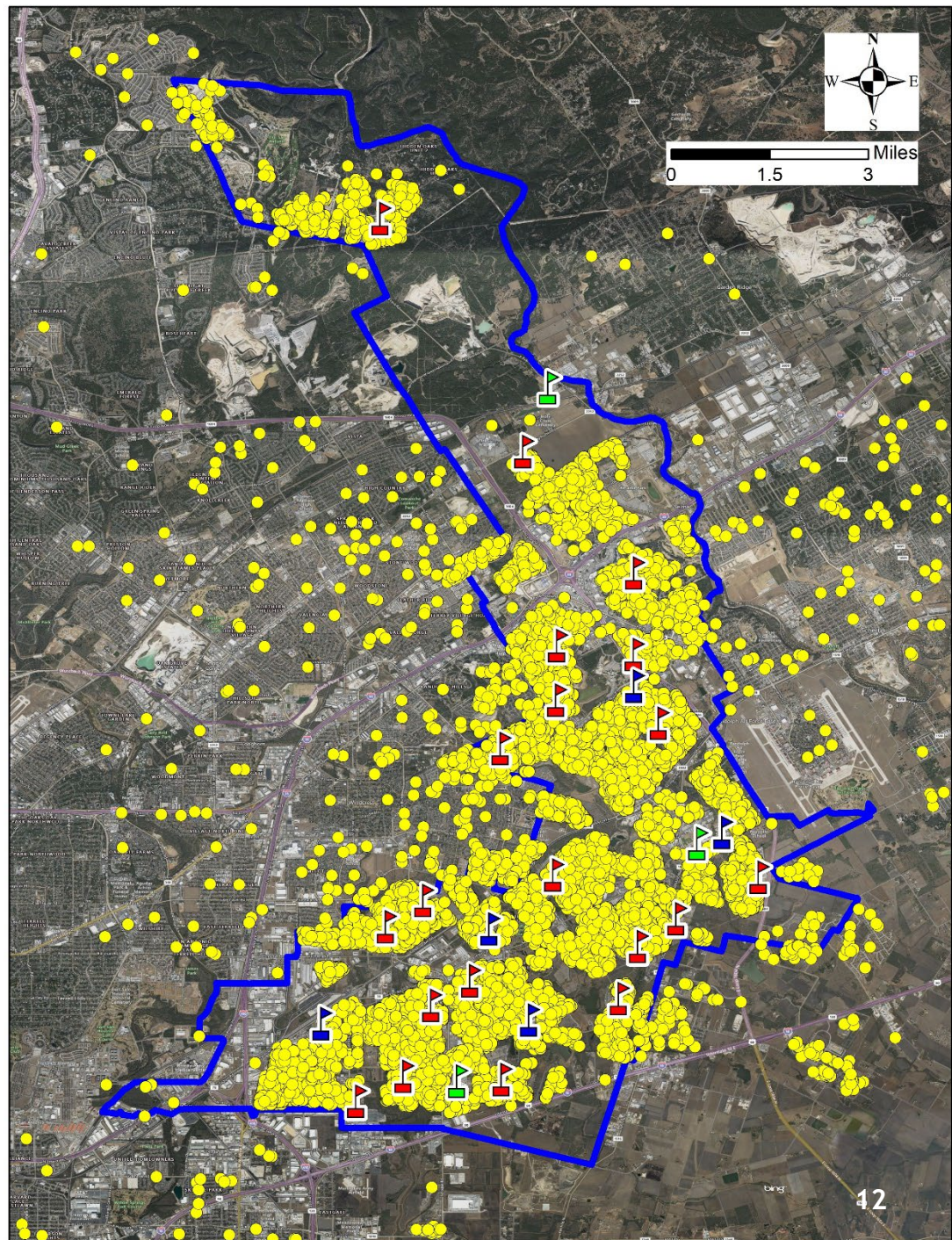


Source: TEA Student Transfers Report



JUDSON ISD STUDENT GEO-CODING 2021/22

- 24,984 students geo-coded in 2021/22
- 94.4% of enrolled students live within the district boundary (23,579 students)



GROWTH DRIVERS: RECORD HOUSING DEMAND IN GREATER SAN ANTONIO CONTINUES

Combined Factors Produces Record Wave of New Construction in 2021

- Drop in mortgage rates to historic lows unlocks pent up demand from renters and move-up buyers
- Millennials age-up into home buying years and become First-time buyers
- Existing home market stripped of listing inventory forcing buyers to new home market
- Local job growth continues to recover, climbing back to pre-pandemic highs
- Relo buyers keep coming during pandemic

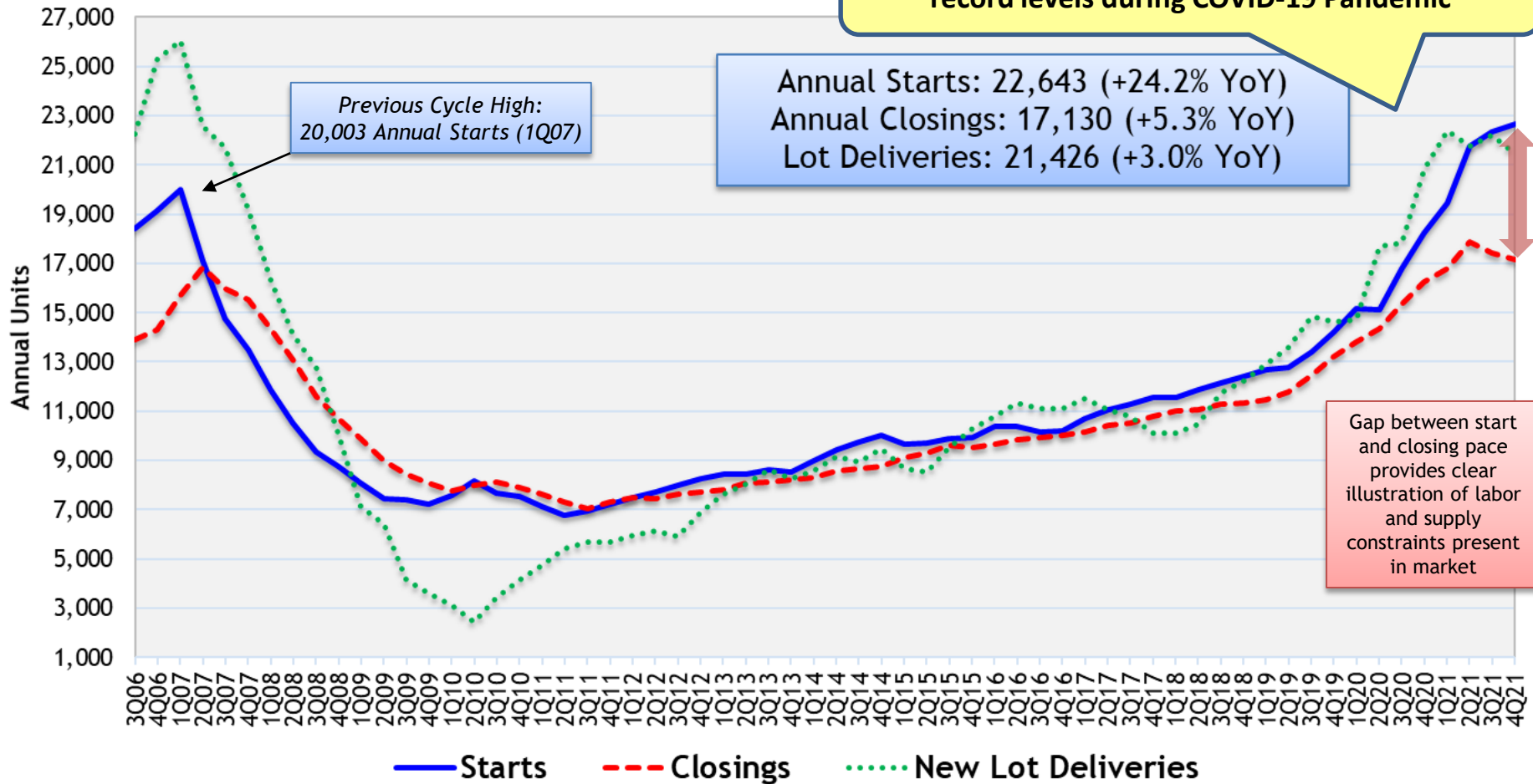
SAN ANTONIO NEW HOME STARTS, CLOSINGS & LOT DELIVERIES

Greater San Antonio new home market grows to record levels during COVID-19 Pandemic

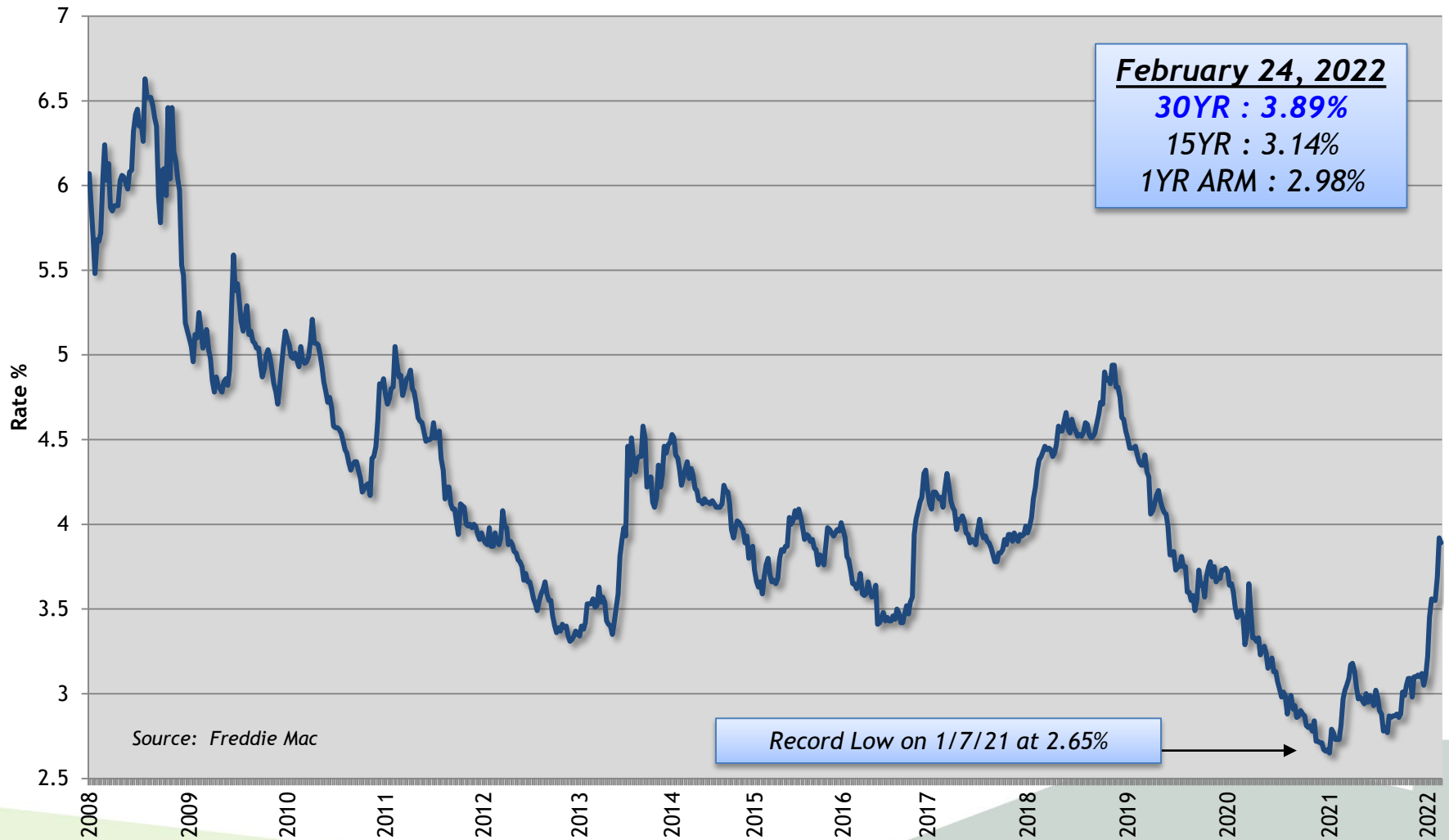
Previous Cycle High:
20,003 Annual Starts (1Q07)

Annual Starts: 22,643 (+24.2% YoY)
Annual Closings: 17,130 (+5.3% YoY)
Lot Deliveries: 21,426 (+3.0% YoY)

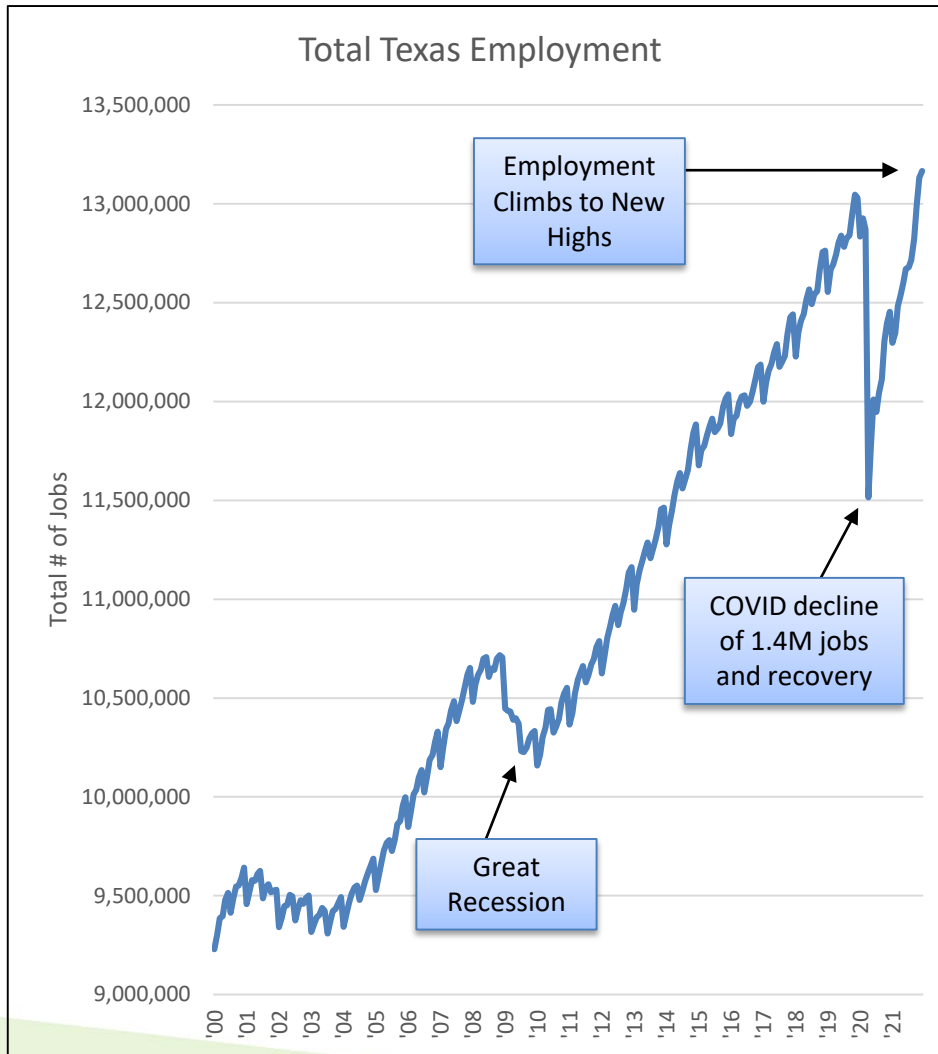
Gap between start and closing pace provides clear illustration of labor and supply constraints present in market



30-YEAR MORTGAGE RATE



TEXAS ECONOMY



Employment Recovering

**Difference From Pre-Pandemic
Level of 2/20 and 12/21**

United States

– -798,000 -0.53%

Texas

– +239,000 +1.85%

Major Texas Markets (Dec 2021) Gap From Pre-Pandemic High

– DFW +113,100 +2.95%

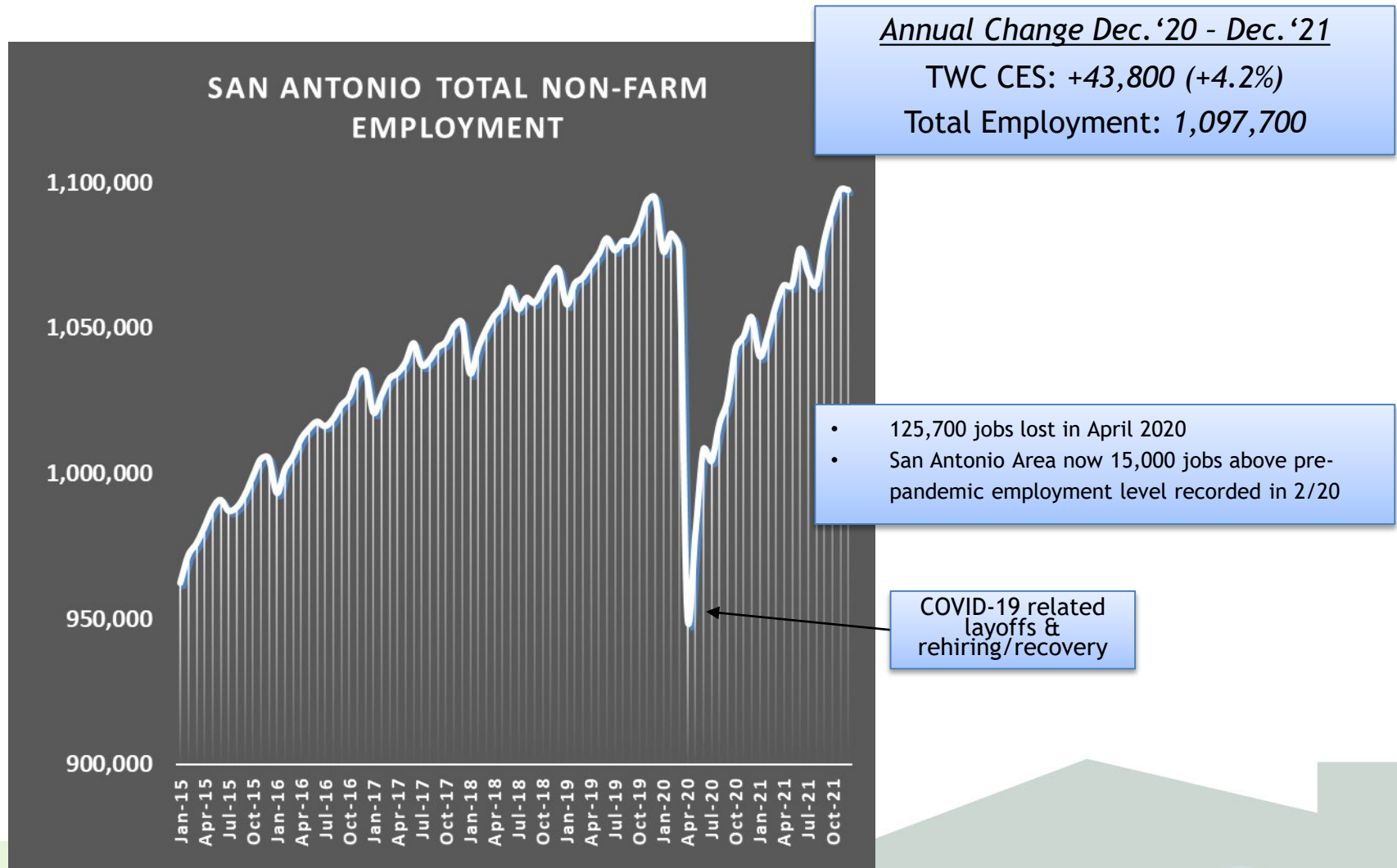
– Houston -44,700 -1.40%

– Austin +49,200 +4.31%

– San Antonio +15,000 +1.39%

Source: TWC - CES (Not Seasonally Adjusted)

SAN ANTONIO EMPLOYMENT GROWTH



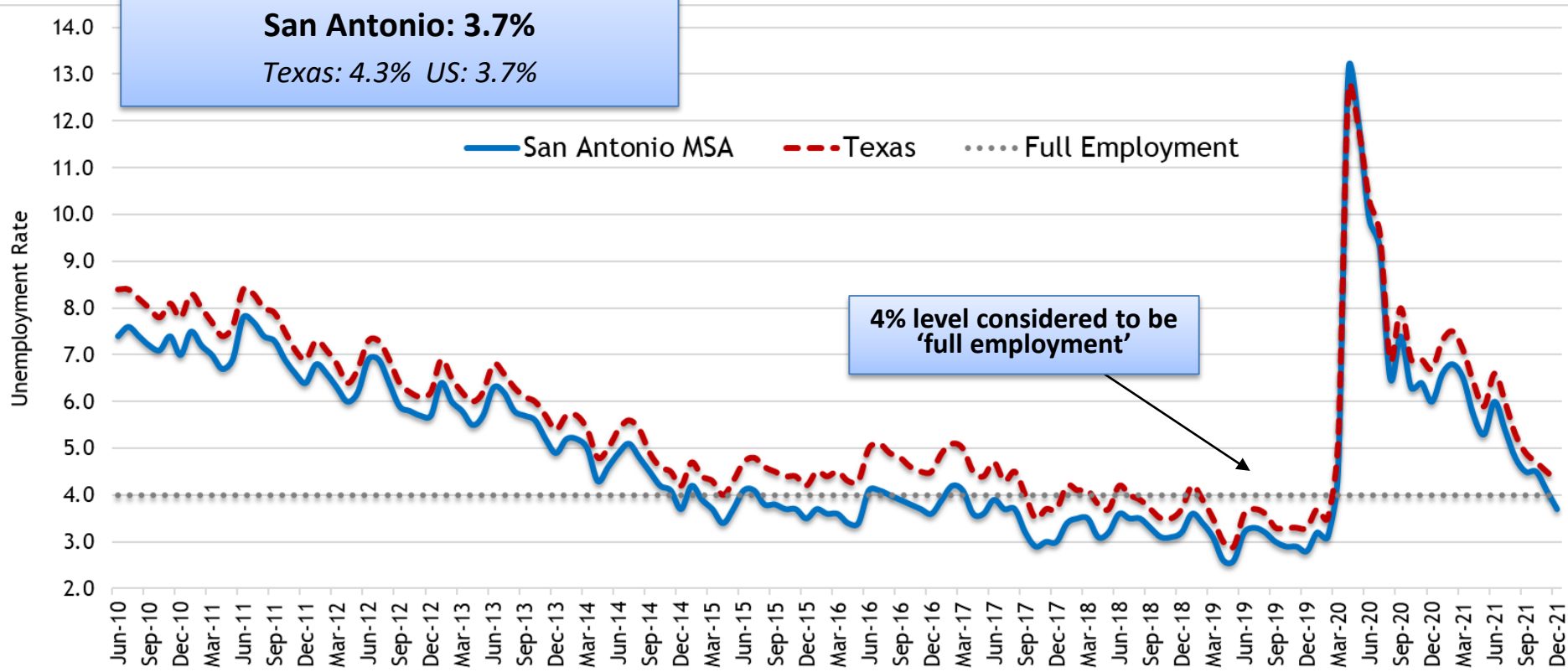
Sources: TWC - CES

SAN ANTONIO UNEMPLOYMENT TRENDS

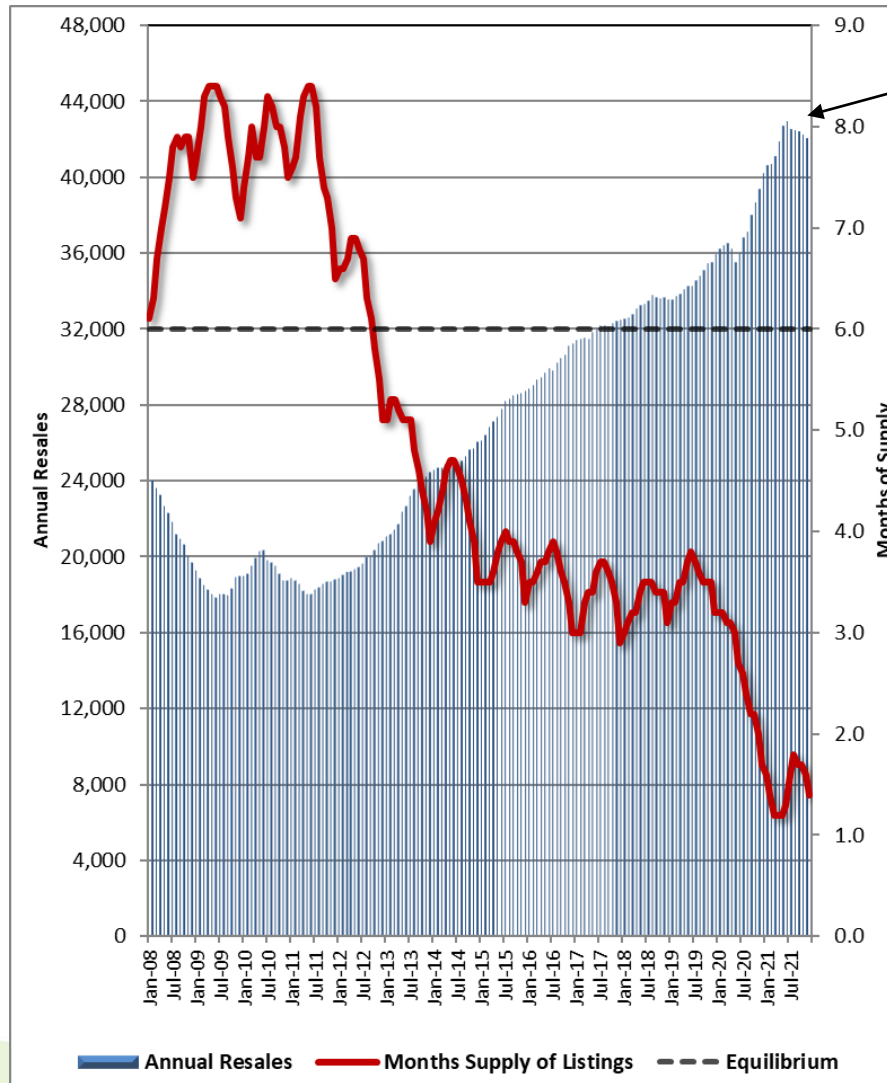
Unemployment Rates (NSA) – Dec '21

San Antonio: 3.7%

Texas: 4.3% US: 3.7%



SAN ANTONIO EXISTING HOME SALES



With inventory remaining near record lows, Existing Home Sales down slightly in 2021

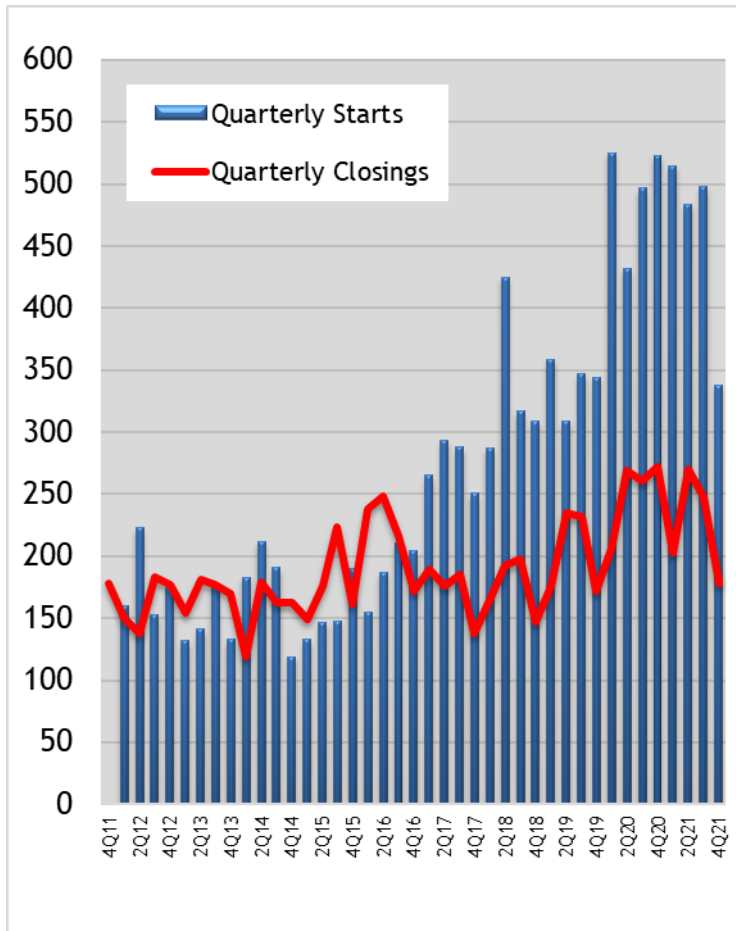
Annual Resale Rate (12/21): 42,053
Up 4.6% vs. 1 Year Ago
Month Supply Listings: 1.4

Source: Texas A&M Real Estate Center



JUDSON ISD

QUARTERLY NEW HOME CONSTRUCTION



Starts	2015	2016	2017	2018	2019	2020	2021
1Q	133	155	265	287	359	525	515
2Q	147	187	293	425	309	432	484
3Q	148	211	288	317	347	497	498
4Q	190	204	251	309	344	523	338
Total	618	757	1097	1338	1359	1,977	1,835

Closings	2015	2016	2017	2018	2019	2020	2021
1Q	176	132	217	281	307	321	386
2Q	155	189	236	307	349	391	552
3Q	144	182	252	316	378	564	427
4Q	122	126	248	311	302	435	357
Total	597	629	953	1215	1336	1,711	1,722

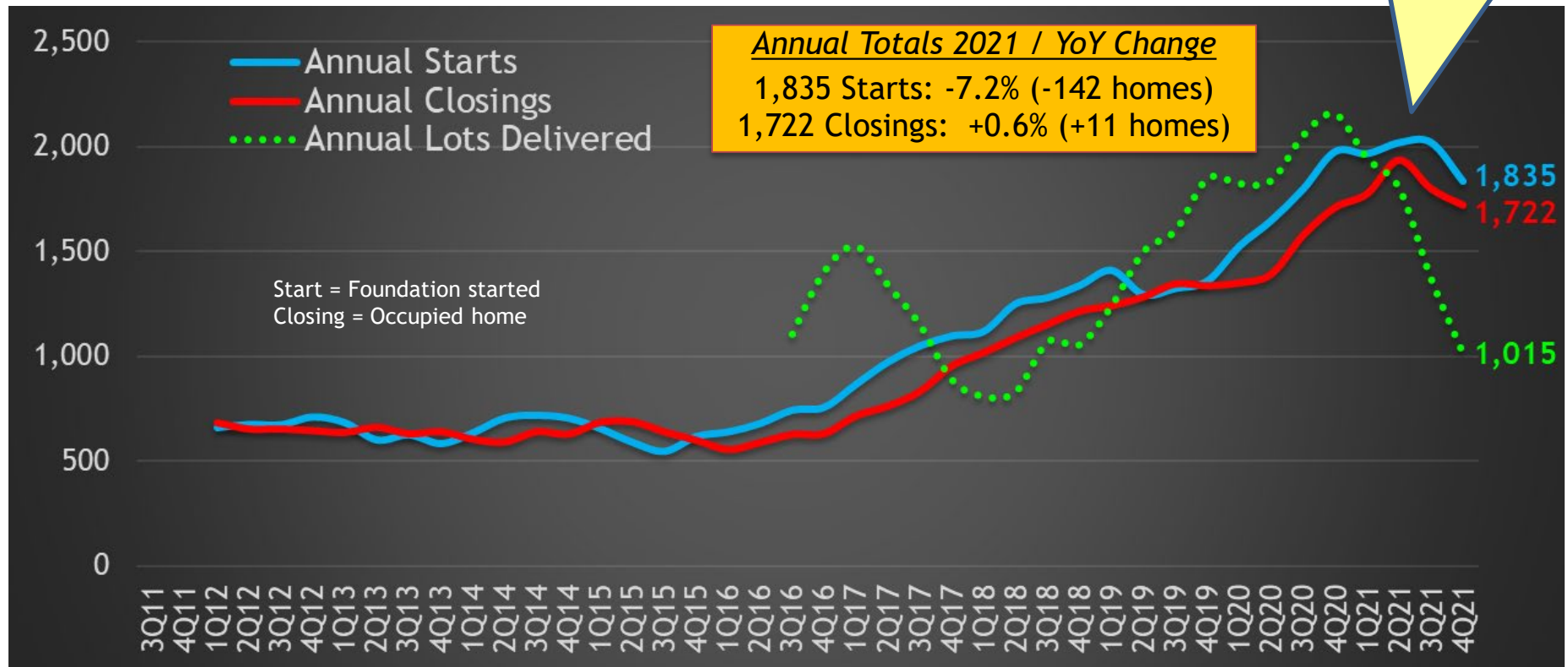
- Beginning in late 2019, new home builders begin to produce record construction in JISD
- Builders started 338 and closed 357 new homes in the district during the 4th quarter of 2021



JUDSON ISD

ANNUAL NEW HOME CONSTRUCTION

Judson ISD new home market grows to record levels during COVID-19 Pandemic



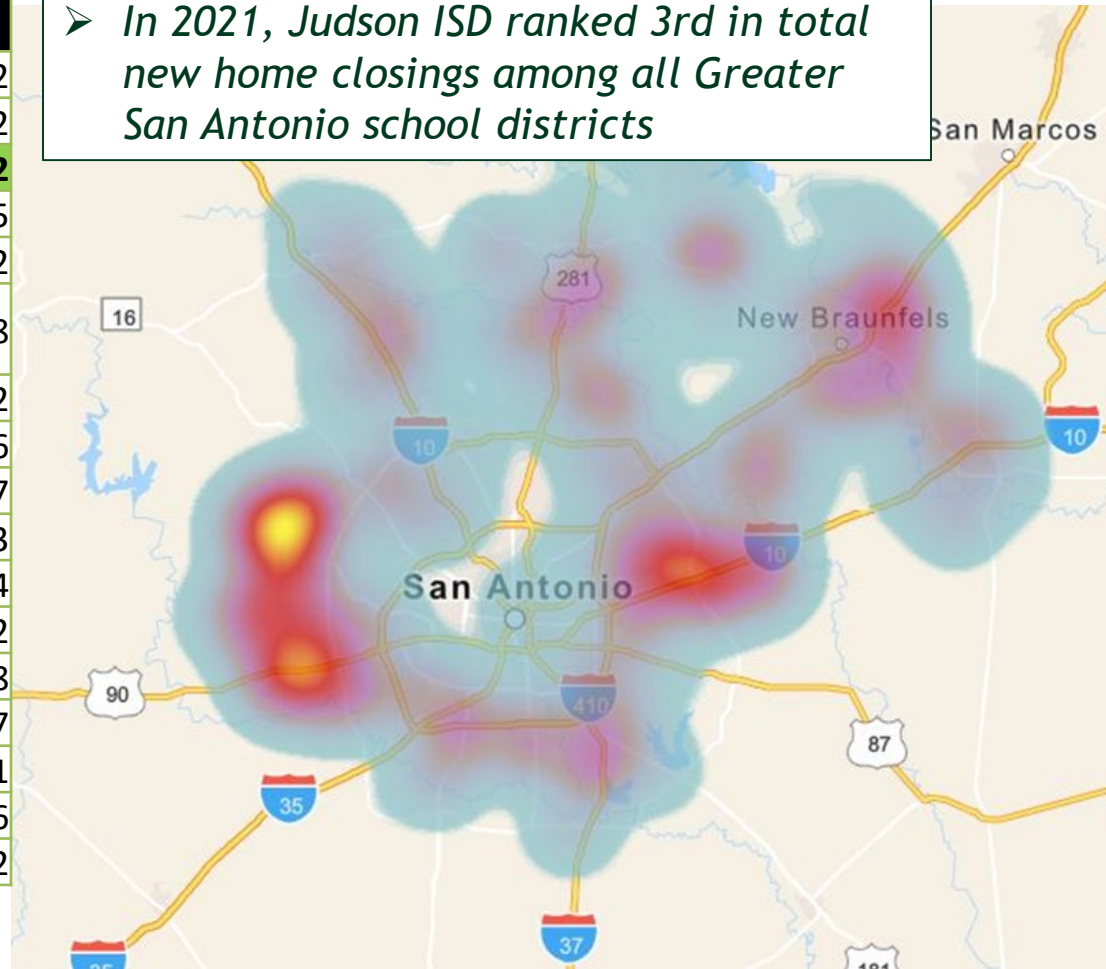
- Annual rates of new home activity reach record highs in JISD during 2021
- The district finishes 2021 with 1,835 starts and 1,722 closings
- Developers delivered 1,015 new single-family lots over past 4 quarters



GREATER SAN ANTONIO SCHOOL DISTRICT RANKINGS BY NEW HOME CONSTRUCTION 2021

	School District Name	Annual Starts	Annual Closings
1	Northside	5,003	4,032
2	Comal	4,045	2,912
3	Judson	1,835	1,722
4	Medina Valley	2,308	1,695
5	East Central	2,331	1,632
6	Schertz-Cibolo-Universal City	1,281	898
7	New Braunfels	1,024	892
8	Boerne	855	746
9	North East	610	727
10	Southwest	1,164	713
11	Seguin	506	304
12	San Antonio	381	232
13	Southside	415	198
14	Navarro	414	187
15	South San Antonio	332	141
16	Marion	24	36
17	Harlandale	95	32

➤ In 2021, Judson ISD ranked 3rd in total new home closings among all Greater San Antonio school districts



Start = Foundation started Closing = Occupied home

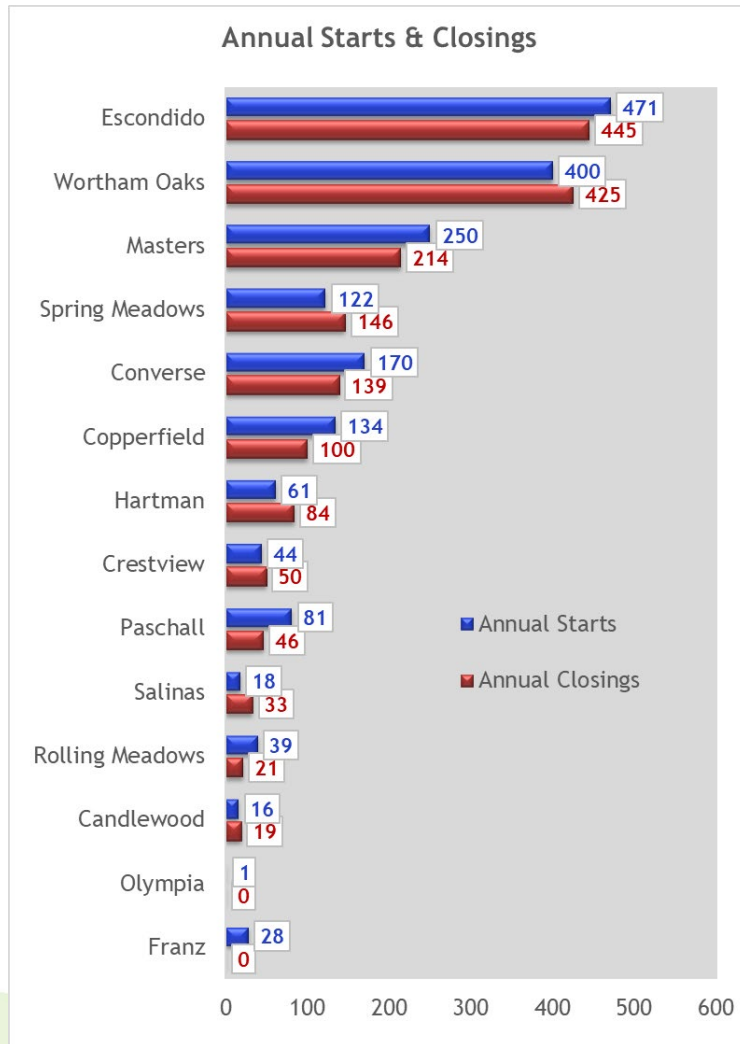


JUDSON ISD TOP PRODUCING NEW HOME SUBDIVISIONS 2021 (ranked by closings)

Rank	Subdivision	Annual Starts	Annual Closings	Elementary Zone	Middle School Zone	High School Zone
1	Horizon Pointe	248	176	Masters	Metzger	Wagner
2	Kendall Brook	143	165	Escondido	Metzger	Wagner
3	Langdon	99	160	Wortham Oaks	Kitty Hawk	Veterans Memorial
4	Liberte Ventura	86	107	Escondido	Metzger	Wagner
5	Avila	111	101	Escondido	Metzger	Wagner
6	Canyon Crest	105	99	Wortham Oaks	Kitty Hawk	Veterans Memorial
7	Crestway Heights	101	85	Spring Meadows	Woodlake Hills	Judson
8	Northeast Crossing	61	84	Hartman	Woodlake Hills	Judson
9	Cibolo Canyons	41	82	Wortham Oaks	Kitty Hawk	Veterans Memorial
10	Hightop Ridge	106	76	Converse	Judson	Judson

JUDSON ISD

NEW HOME ACTIVITY BY ELEMENTARY ZONE: 2021

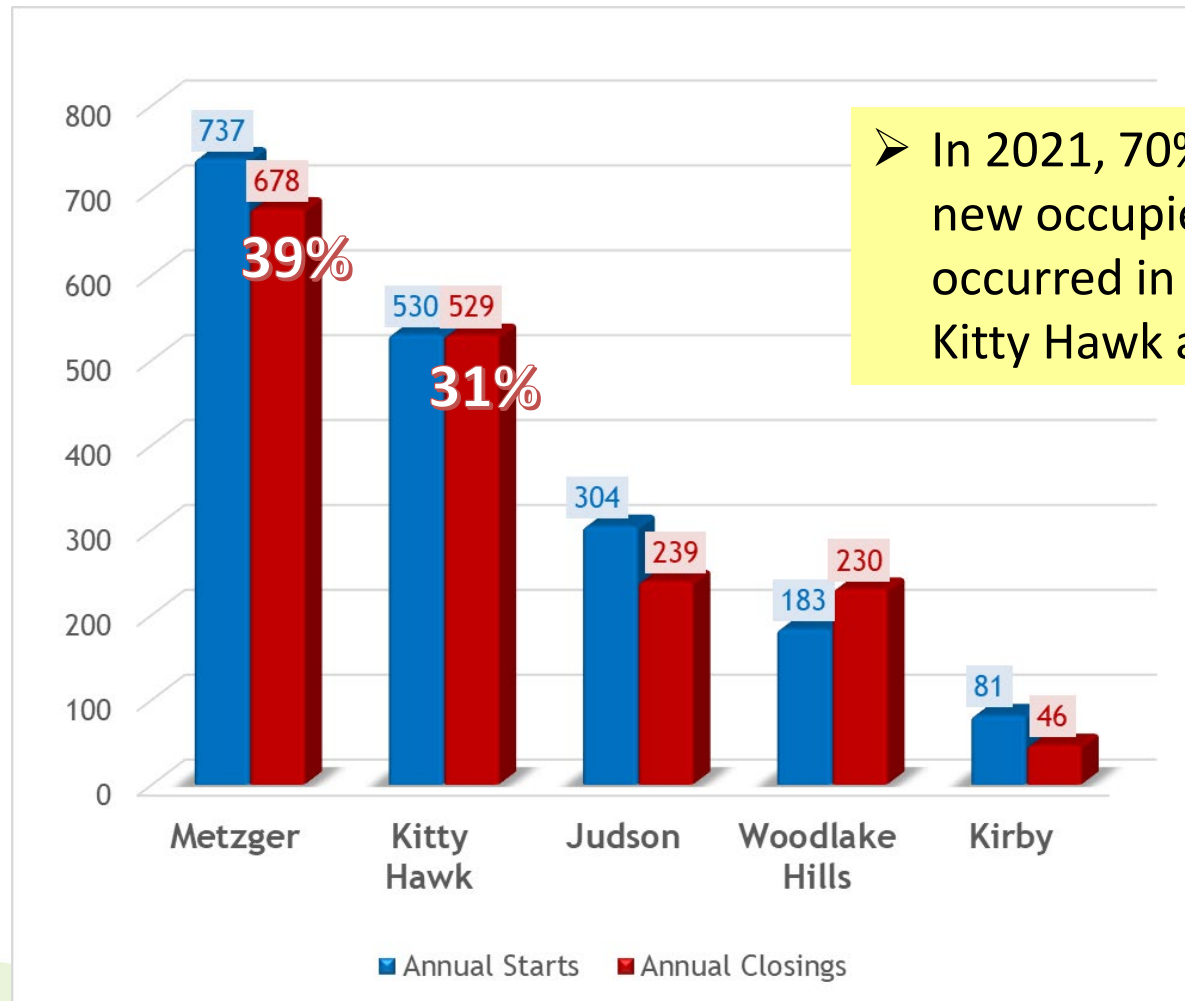


- Nearly 51% of JISD's new homes built in 2021 were located in the Escondido & Wortham Oaks attendance zones
- The Masters attendance zone produced another 250 starts and 214 closings
- Builders in the Springs Meadows, Converse, and Copperfield zones each produced 100 or more closings in 2021



JUDSON ISD

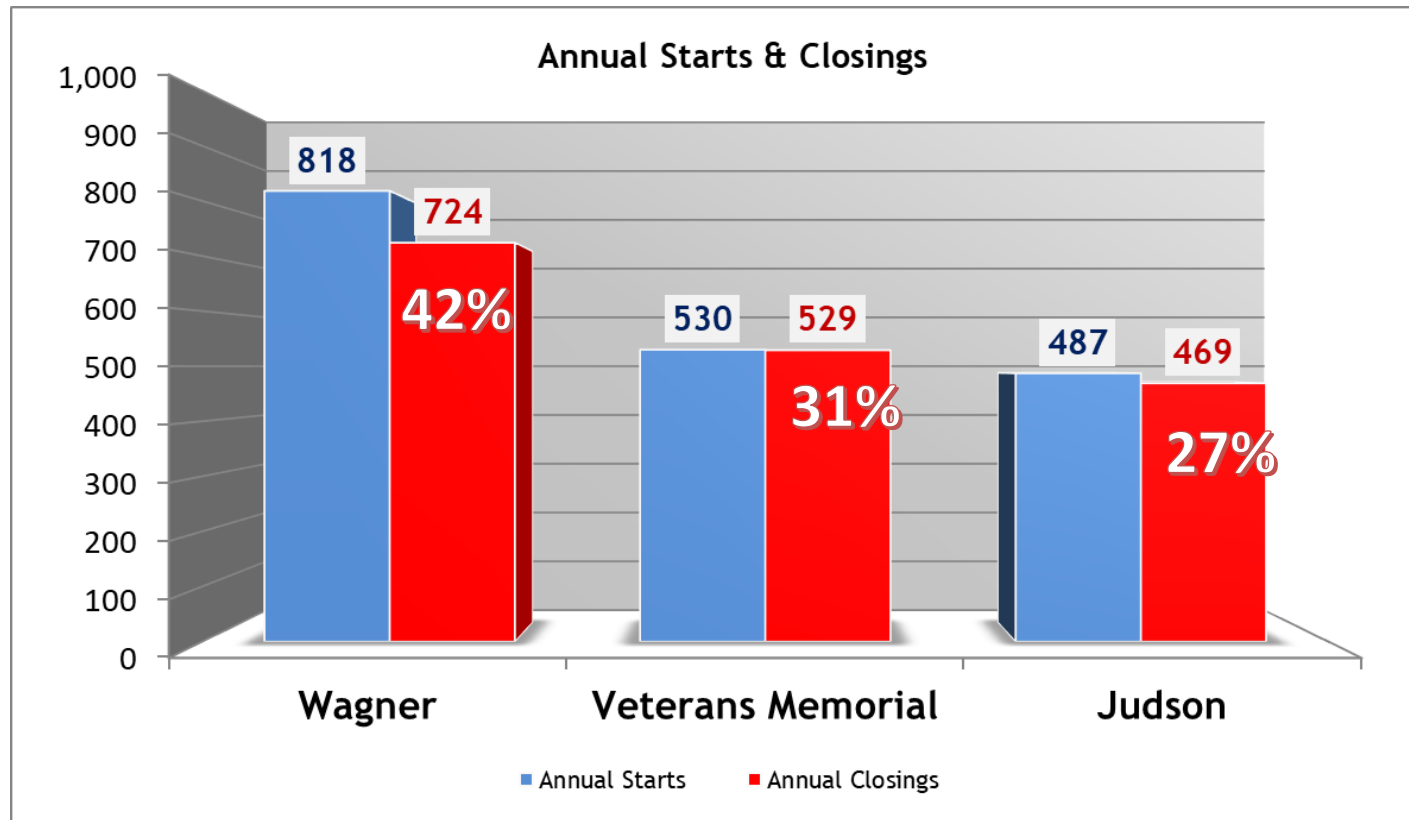
NEW HOME ACTIVITY BY MIDDLE SCHOOL ZONE: 2021





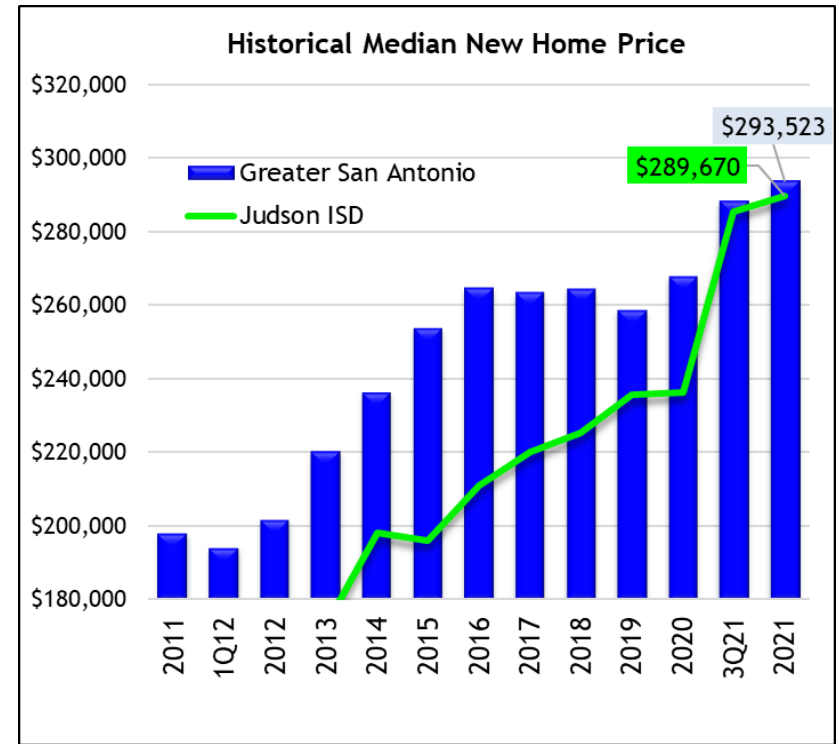
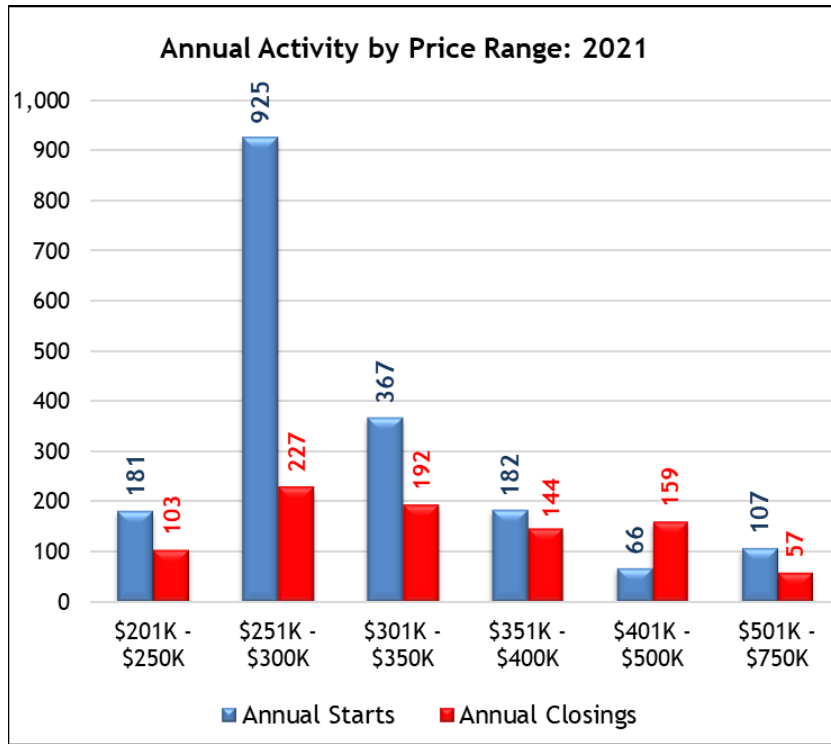
JUDSON ISD

NEW HOME ACTIVITY BY HIGH SCHOOL ZONE: 2021





DISTRICT MEDIAN NEW HOME PRICE

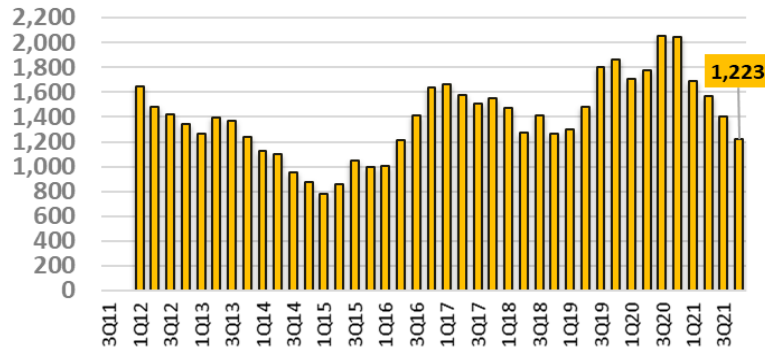


- Sales of value driven, move-up homes priced between \$251K and \$350K remain the most popular, but the JISD new market offers a wide-range of new homes at all price points
- The district's median new home price as of Y/E 2021 was a record \$289,670 (+22.7% YoY)

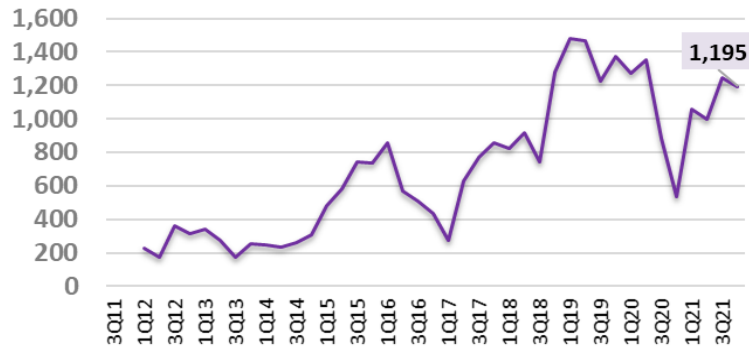


JISD NEW HOME LOT INVENTORY

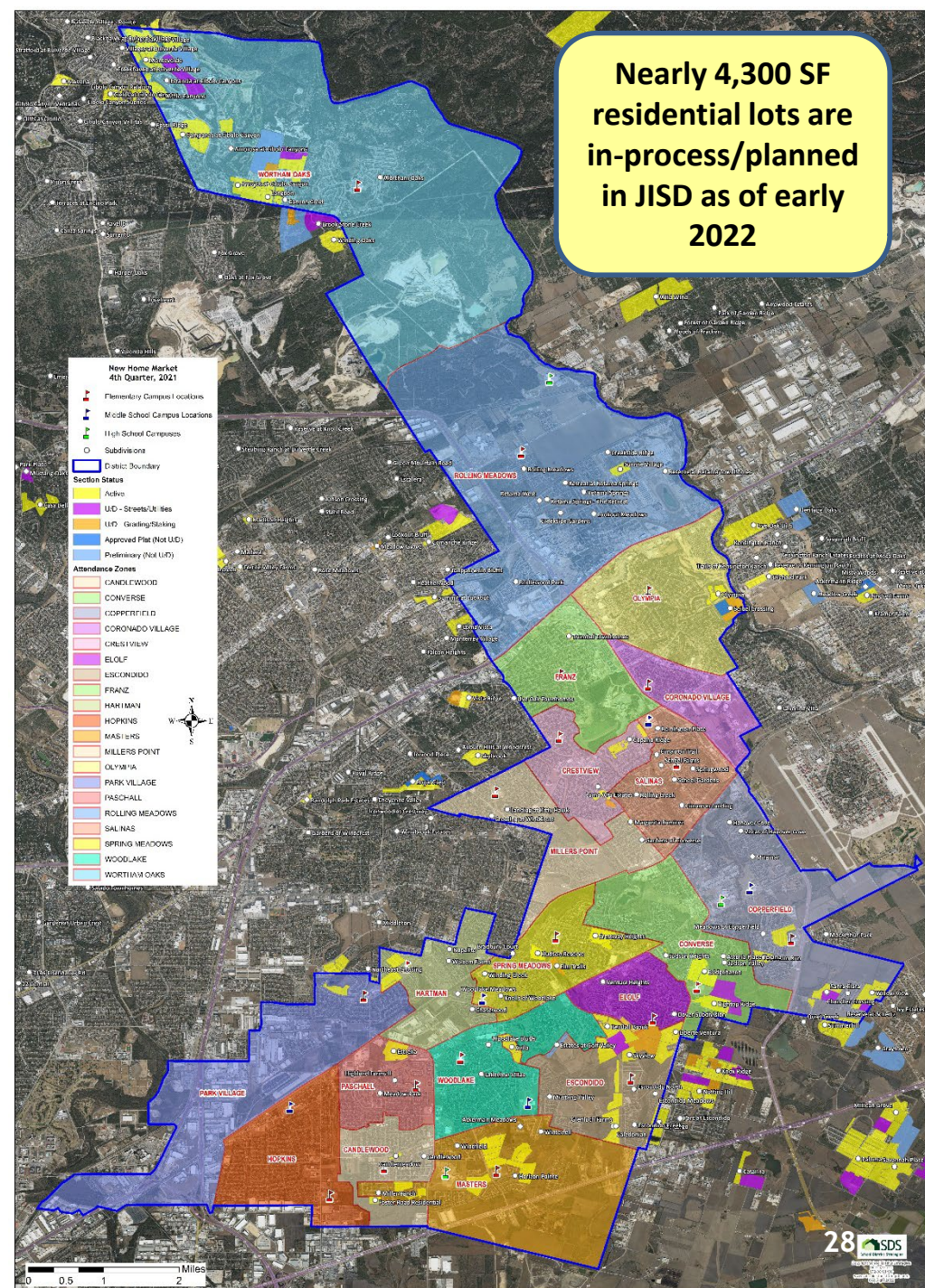
JISD Vacant Developed Lots



JISD Lots Under Development



- 1,205 homes in-process (under construction, finished vacant, or models)
- 1,223 vacant developed lots remaining as of year-end 2021 (7.8 month supply)
- 1,195 future lots under development
- An additional 675 future lots are planned



Aerial Photos March 2022



MONTEVERDE / CIBOLO CANYONS



Estancia at
Cibolo Canyons

Monteverde
Ph. 4A

TPC San Antonio

TPC Parkway



CANYON CREST/ LANGDON/WORTHAM OAKS



Wortham Oaks ES

KB Home

Future Phase(s) of Langdon



SUNRISE VILLAGE





HIGHTOP RIDGE / BRIDGEHAVEN





LIBERTE VENTURA / KENDALL BROOK



Eloft ES



HORIZON POINTE





MILLER RANCH (FOSTER RD RESIDENTIAL)

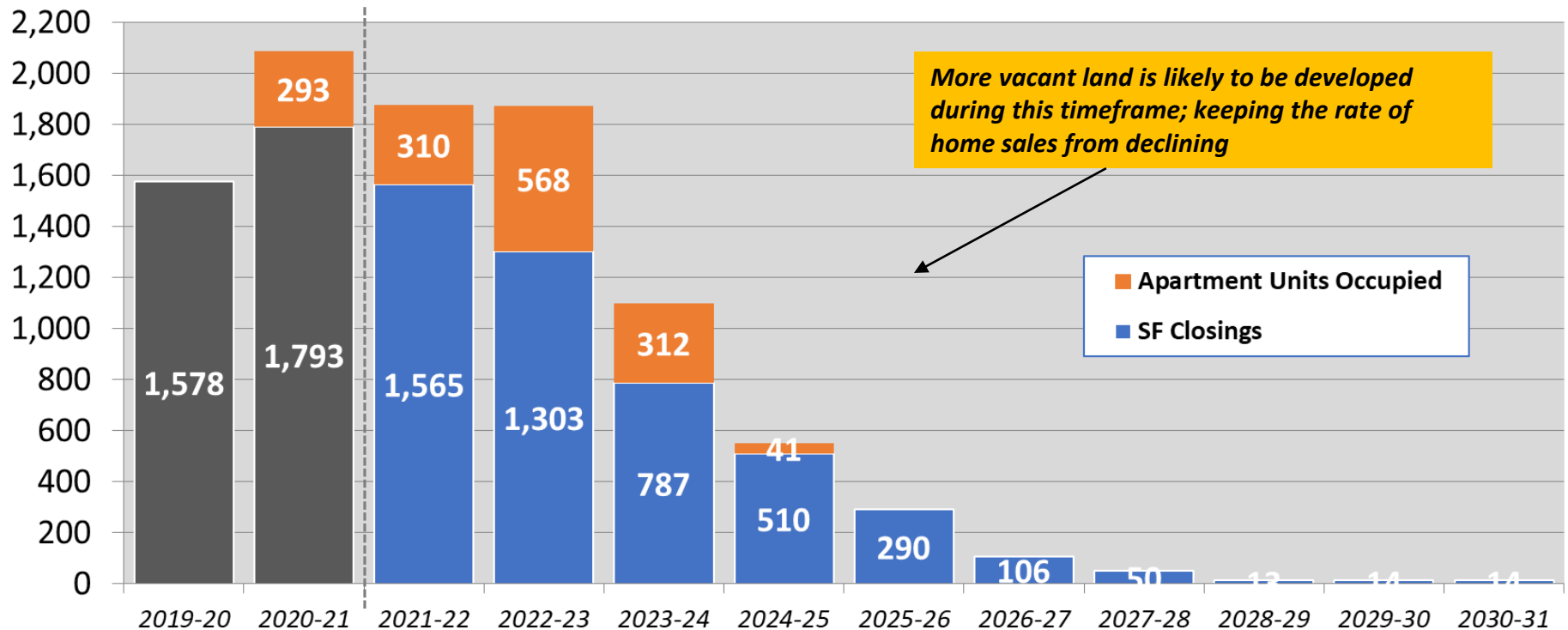


Miller Ranch



DISTRICT NEW HOME OCCUPANCY FORECAST

(Moderate Scenario - Based on known projects as of March 2021)



Annual Period = 4Q-3Q

- About 4,500 total new home closings projected in the district over the next five years
- Majority of the currently planned single-family residential developments are expected to be built-out by 2028
- At least 1,200 new apartment units are expected to be delivered over the next 3-4 years



STUDENT YIELDS ANALYSIS

Historical Yield by Attendance Level (SF Homes)	Pre-K	ES K-5 th	MS 6 th -8 th	HS 9 th -12 th
2021/22	0.05	0.19	0.10	0.14

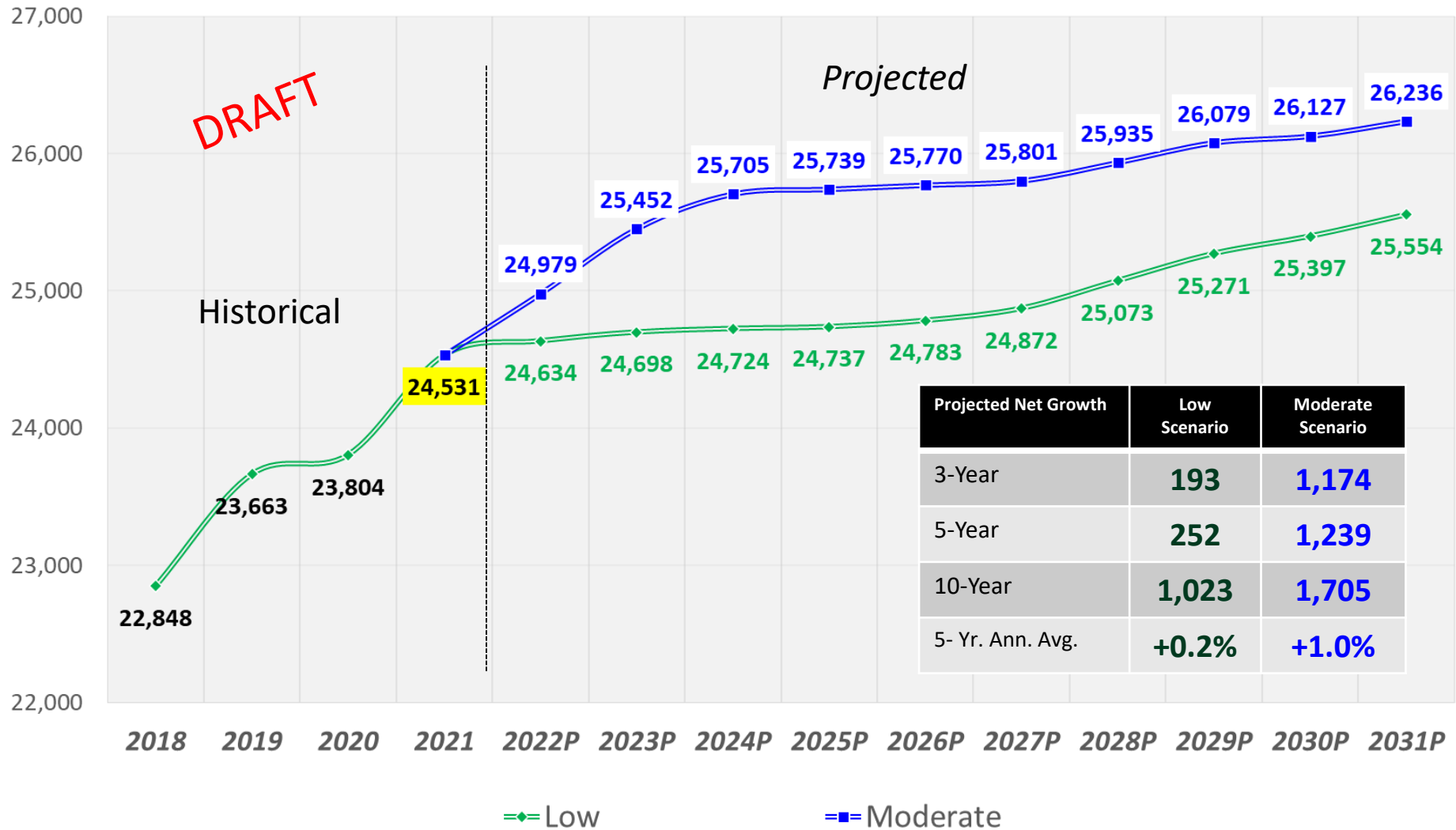
- The typical single-family home in JISD produced a yield of 0.47 enrolled students per home
- The average yield from currently active new home subdivisions is lower than the district average at 0.35

Historical Yield by Attendance Level (Apartment Units)	Pre-K	ES K-5 th	MS 6 th -8 th	HS 9 th -12 th
2021/22	0.02	0.09	0.04	0.04

- In 2021/22, the district's average multi-family yield is 0.20 enrolled students per apartment unit



DISTRICT ENROLLMENT PROJECTIONS SUMMARY (PK-12)

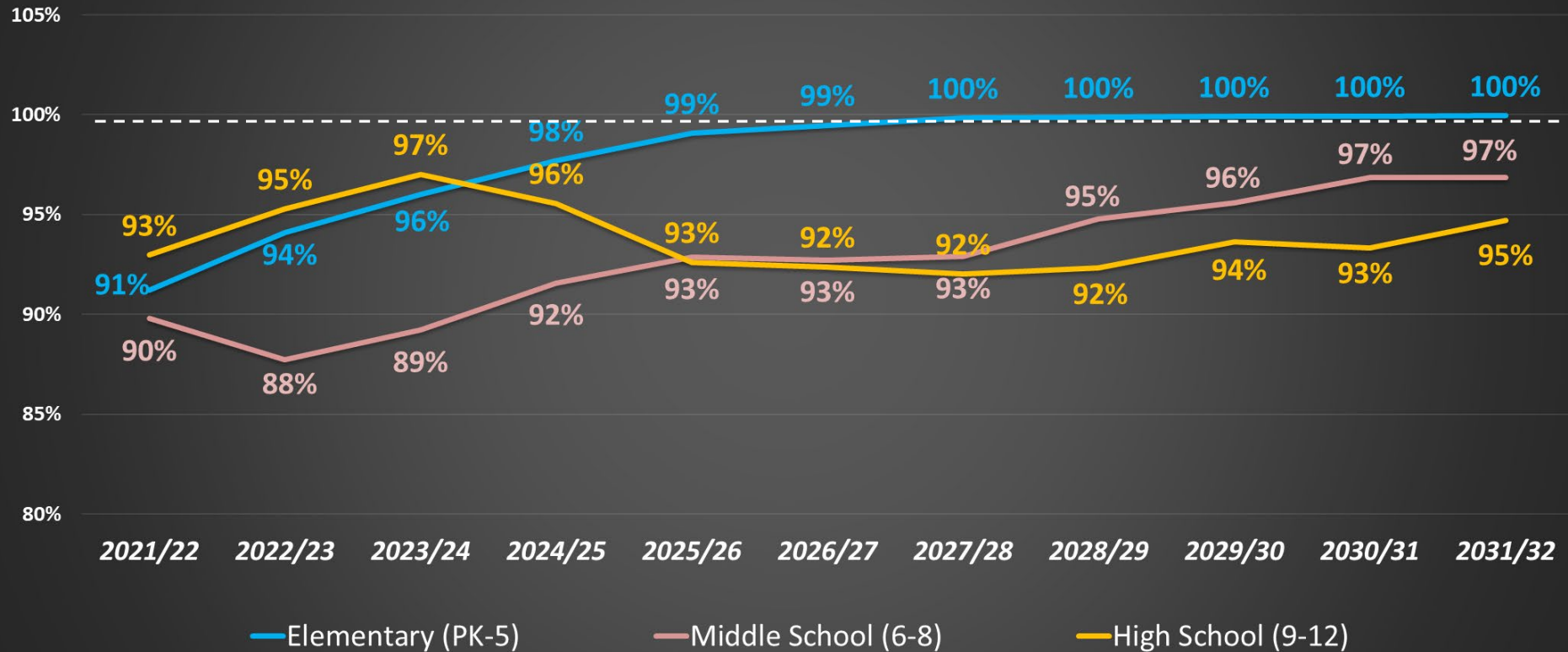




ATTENDANCE LEVEL CAPACITY UTILIZATION (MODERATE GROWTH)

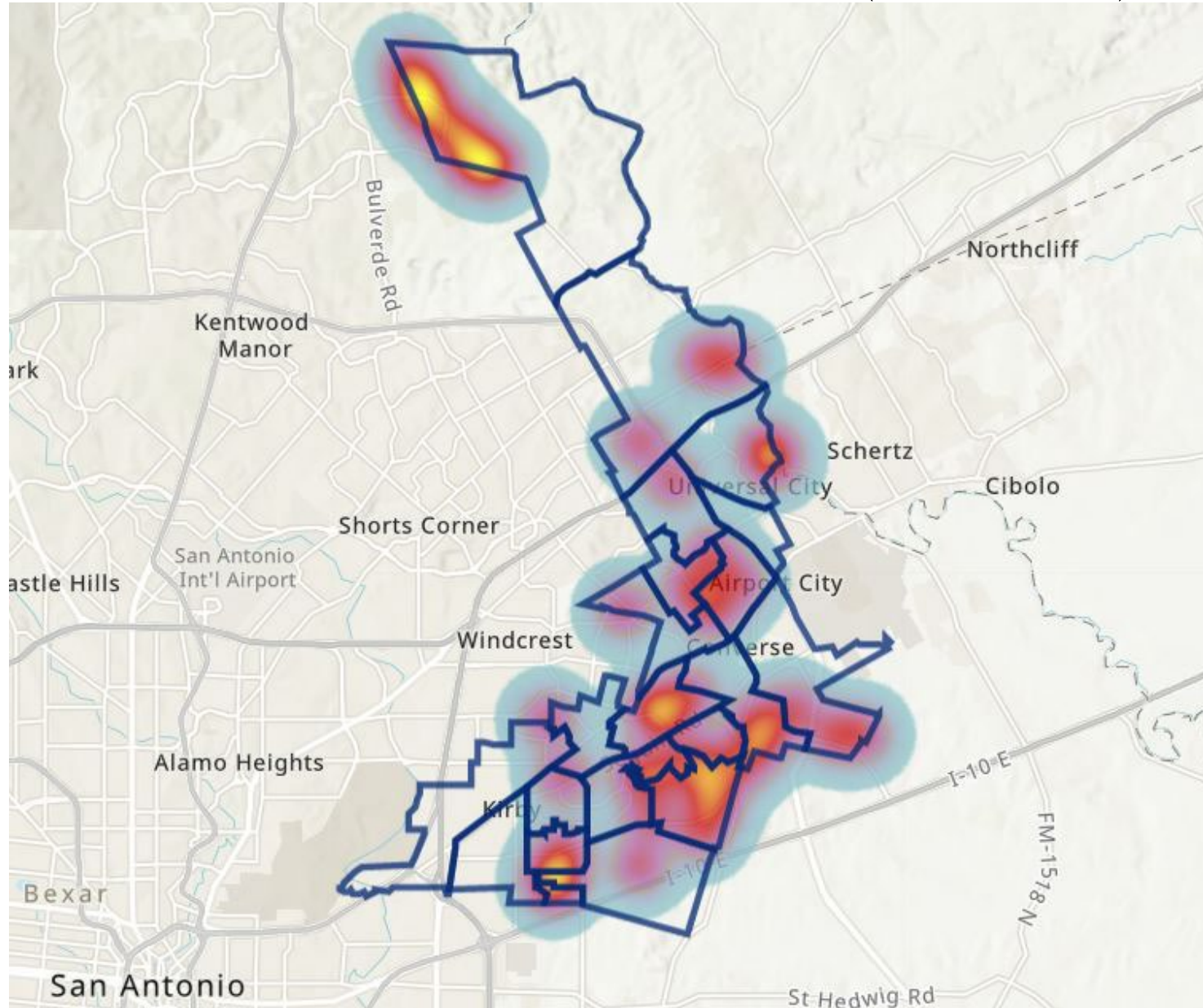


Attendance Level Enrollment Projections vs. Capacity Utilization (Moderate Growth Scenario)





JUDSON ISD PROJECTED STUDENT GROWTH FROM RESIDENTIAL CONSTRUCTION (2022-2031)

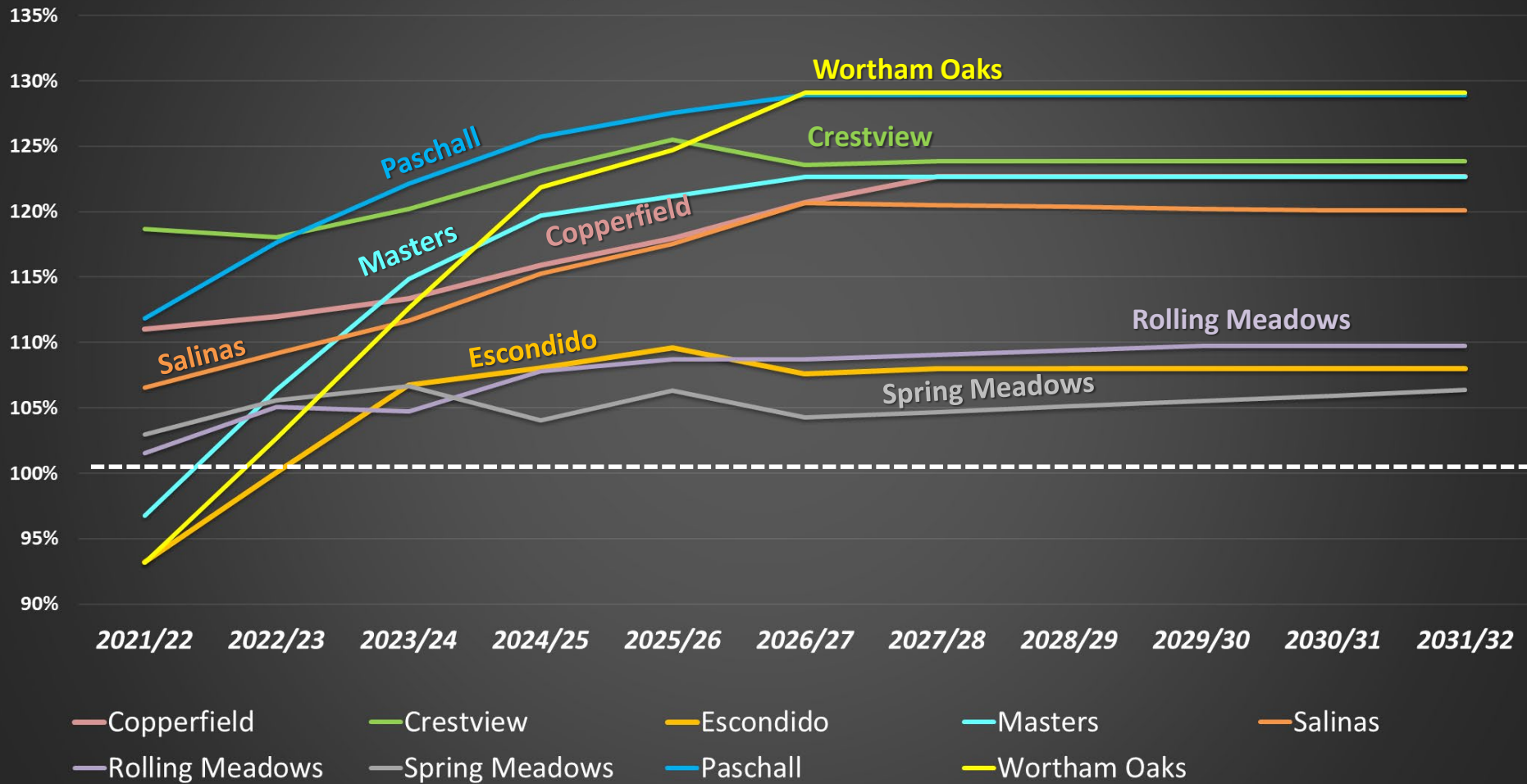




ELEMENTARY CAMPUS CAPACITY UTILIZATION (MODERATE GROWTH)



Elementary Campus Enrollment Projections vs. Functional Capacity Utilization
(Moderate Growth Scenario)

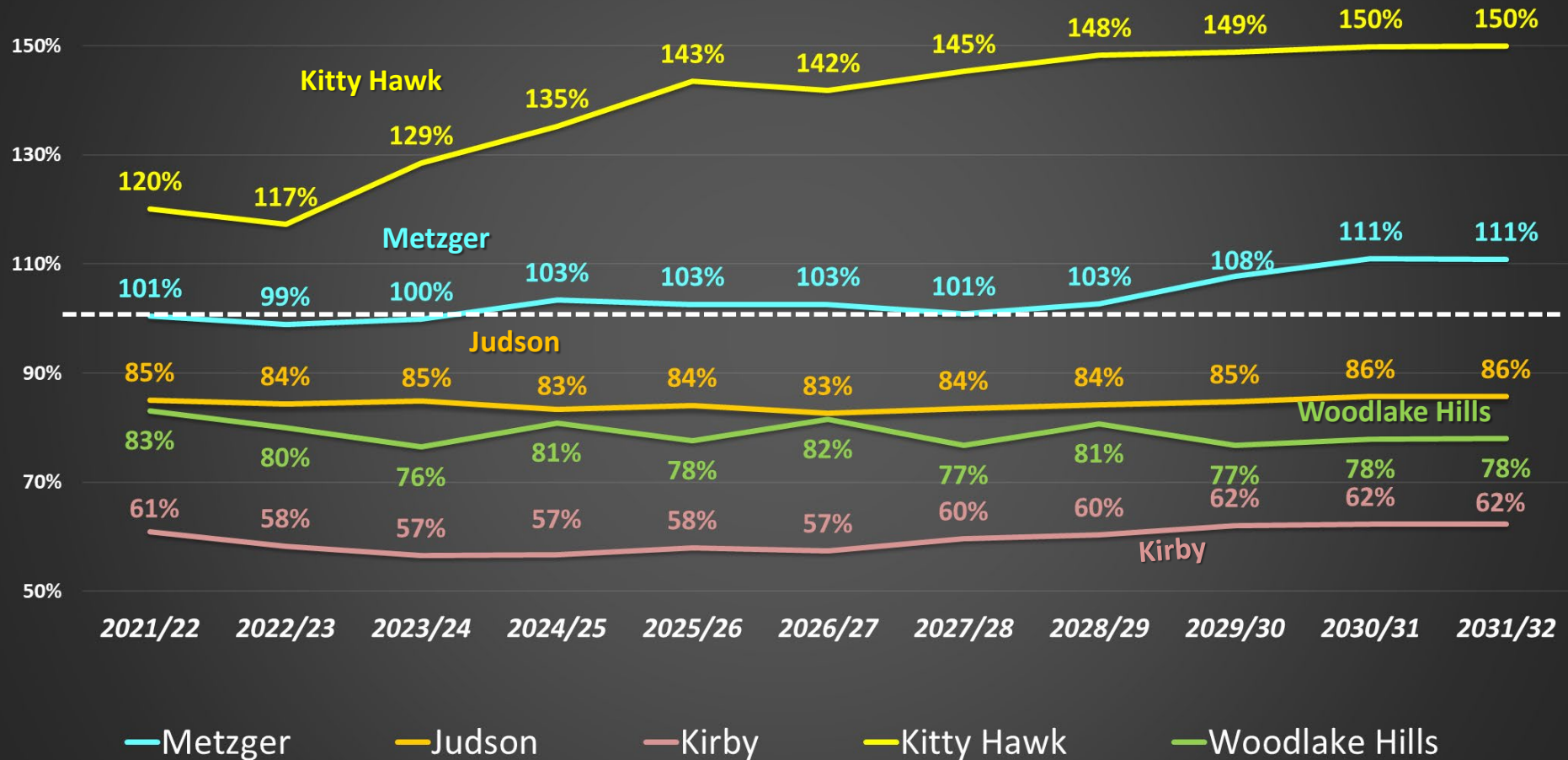




MIDDLE SCHOOL CAMPUS CAPACITY UTILIZATION (MODERATE GROWTH)



Middle School Campus Enrollment Projections vs. Practical Capacity Utilization
(Moderate Growth Scenario)

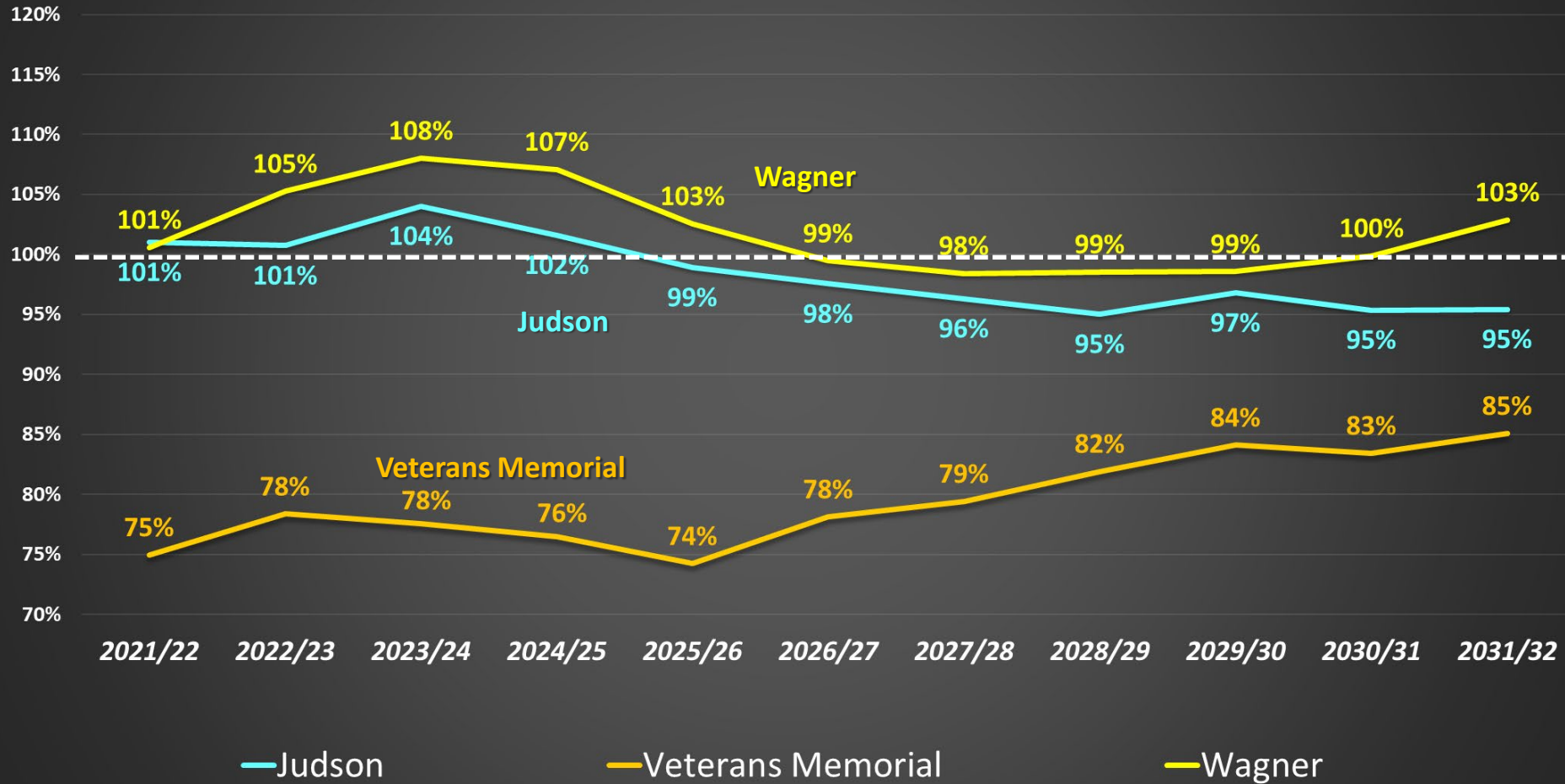




HIGH SCHOOL CAMPUS CAPACITY UTILIZATION (MODERATE GROWTH)



High School Campus Enrollment Projections vs. Practical Capacity Utilization
(Moderate Growth Scenario)





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