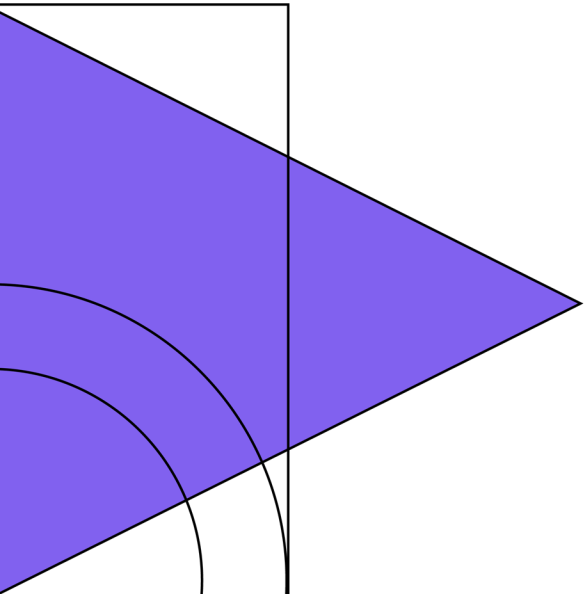
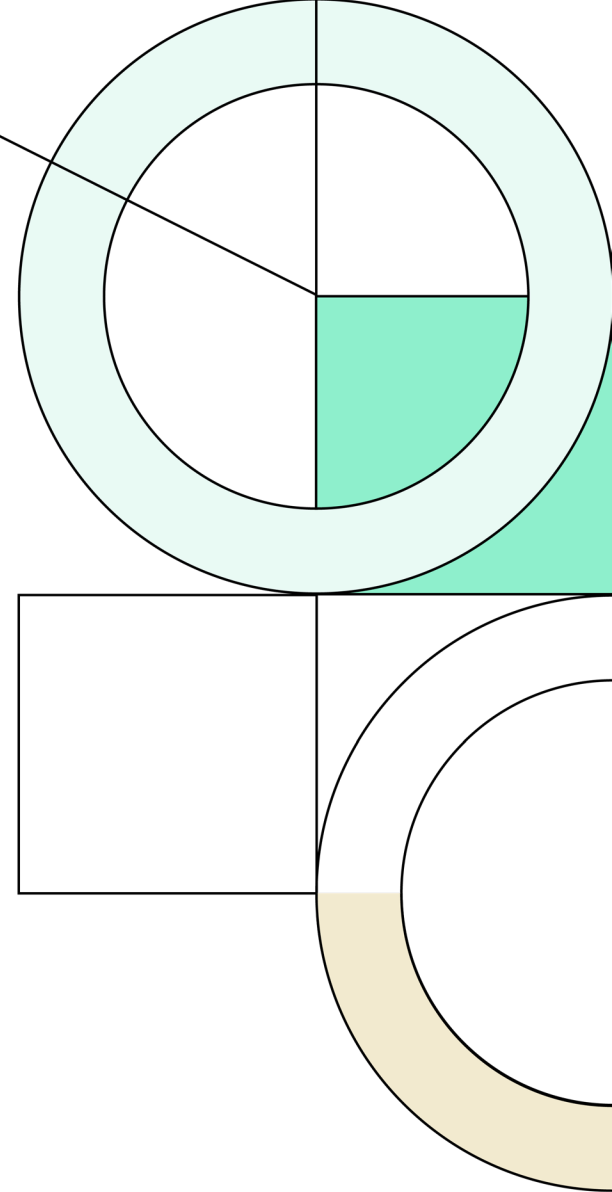




College Station Independent School District

Fall 2023/24 Demographic Report





Annual Enrollment Change

Year (Oct.)	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	% Growth
2019/20	142	425	1,032	1,015	1,019	1,011	1,024	1,091	1,104	1,079	994	1,103	1,014	982	901	13,936	396	2.9%
2020/21	95	384	986	1,025	942	980	998	1,005	1,053	1,089	1,064	1,066	1,053	958	966	13,664	-272	-2.0%
2021/22	80	452	1,058	1,047	1,066	962	1,006	1,035	1,043	1,099	1,112	1,202	1,045	1,009	990	14,206	542	4.0%
2022/23	100	500	982	1,109	1,032	1,078	999	1,008	1,058	1,086	1,116	1,230	1,163	1,013	1,015	14,489	283	2.0%
2023/24	113	448	993	1,013	1,099	1,016	1,052	992	1,006	1,082	1,076	1,226	1,181	1,109	982	14,388	-101	-0.7%

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

Projections variance

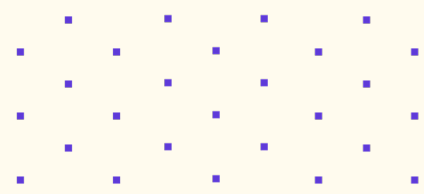
	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total
2023/24	100	500	980	1,031	1,121	1,045	1,096	1,031	1,028	1,101	1,105	1,256	1,173	1,143	1,006	14,717
projections	13	-52	13	-18	-22	-29	-44	-39	-22	-19	-29	-30	8	-34	-24	-329

Cohort Change

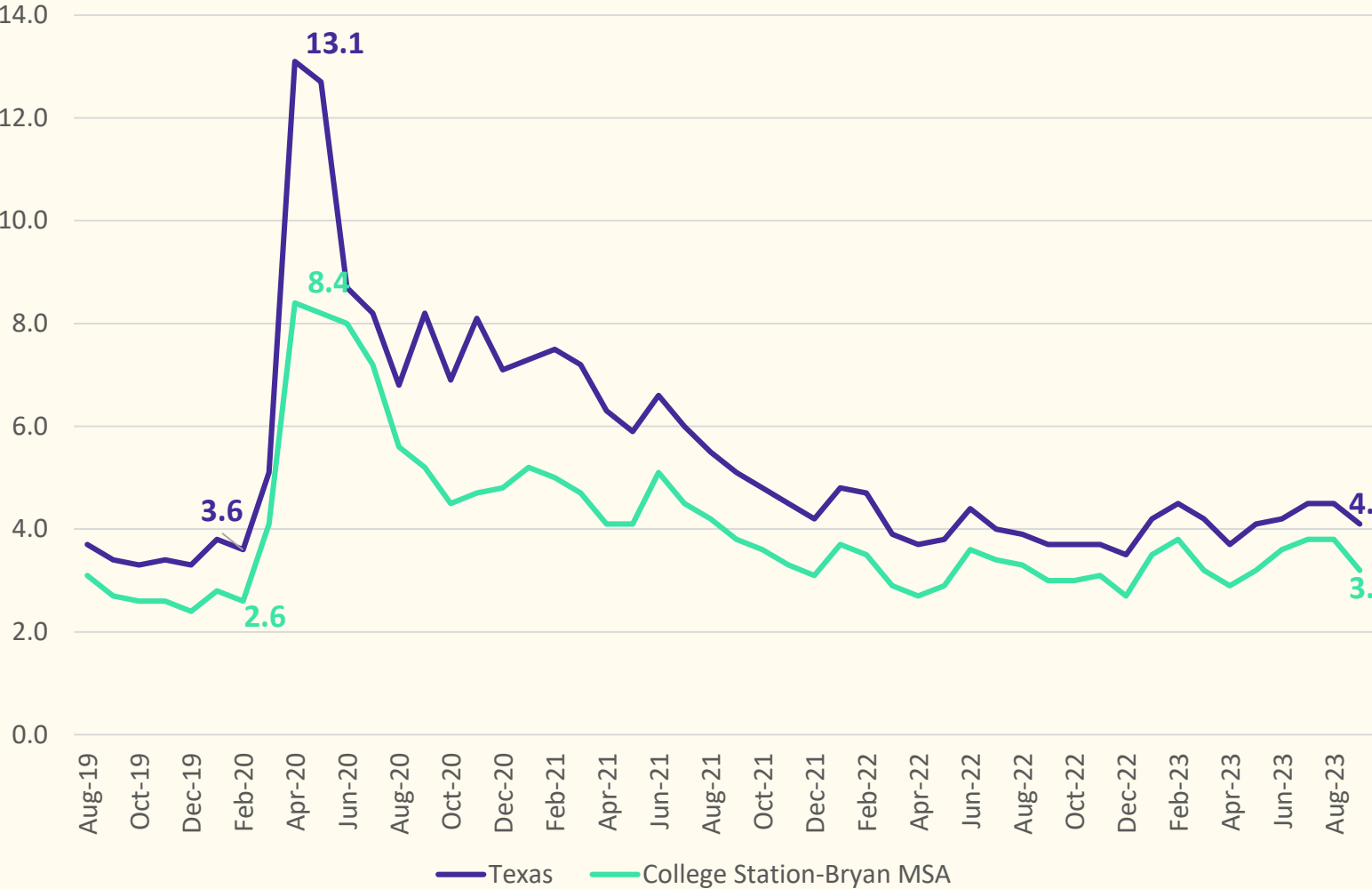
	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	KG-4th	5th-6th	7th-8th	9th-12th
3 YR Avg	1.074	1.060	1.004	1.047	1.006	1.006	1.014	1.011	1.019	1.036	1.009	1.111	0.969	0.960	1.003	1.015	1.015	1.022	1.011
2020/21	0.669	0.904	0.955	0.993	0.928	0.962	0.987	0.981	0.965	0.986	0.986	1.072	0.955	0.945	0.984	0.965	0.973	0.986	0.989
2021/22	0.842	1.177	1.073	1.062	1.040	1.021	1.027	1.037	1.038	1.044	1.021	1.130	0.980	0.958	1.033	1.045	1.037	1.032	1.025
2022/23	1.250	1.106	0.928	1.048	0.986	1.011	1.038	1.002	1.022	1.041	1.015	1.106	0.968	0.969	1.006	1.002	1.012	1.028	1.012
2023/24	1.130	0.896	1.011	1.032	0.991	0.984	0.976	0.993	0.998	1.023	0.991	1.099	0.960	0.954	0.969	0.999	0.996	1.007	0.995



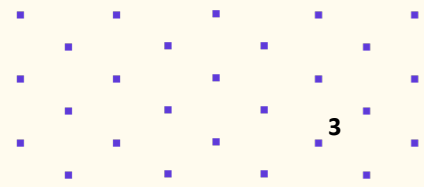
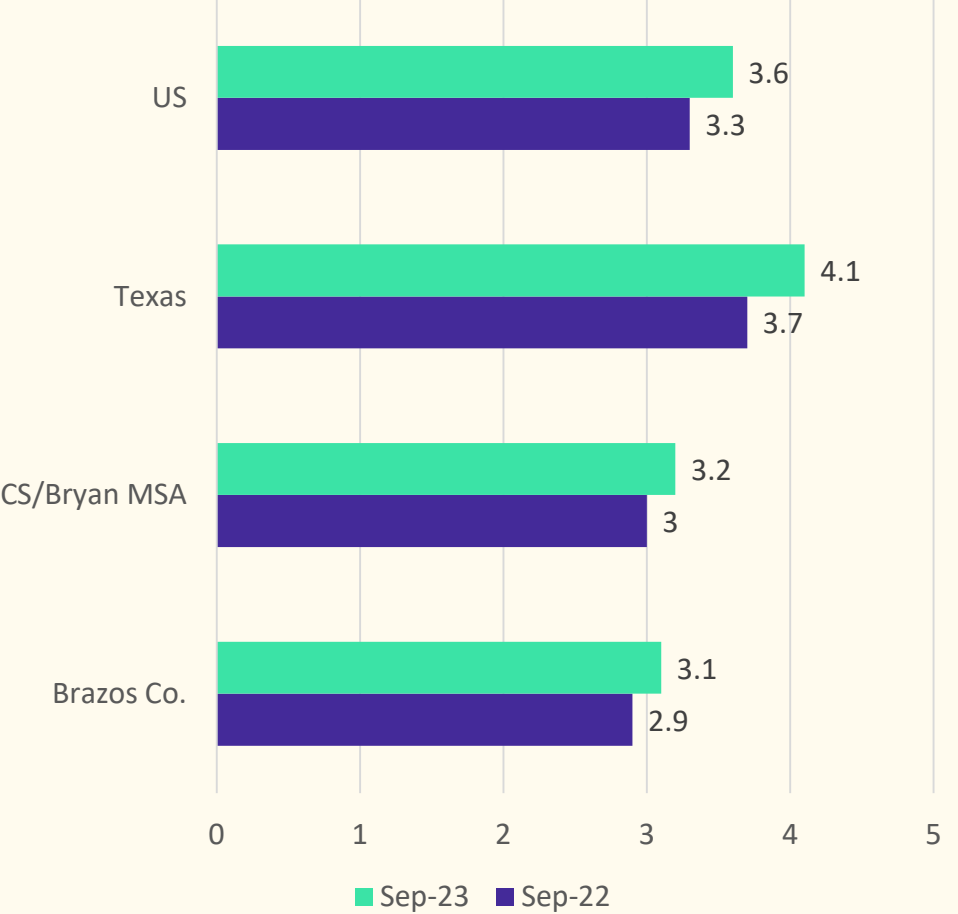
Local Economic Conditions



Unemployment Rate, Aug 2019 – Sept 2023



Unemployment Rate, Year Over Year





Local Economic Conditions

Strategic Armory Corps

- Bryan Commerce & Development Incorporated approved decision to relocate Strategic Armory Corps world headquarters to Bryan, TX
- Plans to be located on 204-acres on Mumford Rd
- Creates firearms products designed to meet expectations of military, law enforcement, and commercial groups world wide
- Construction will be in two phases anticipated to start by late 2024
- Strategic Armory Corps plans to have 70 full-time jobs available with an average salary of at least \$55,000 after 5 years of operations



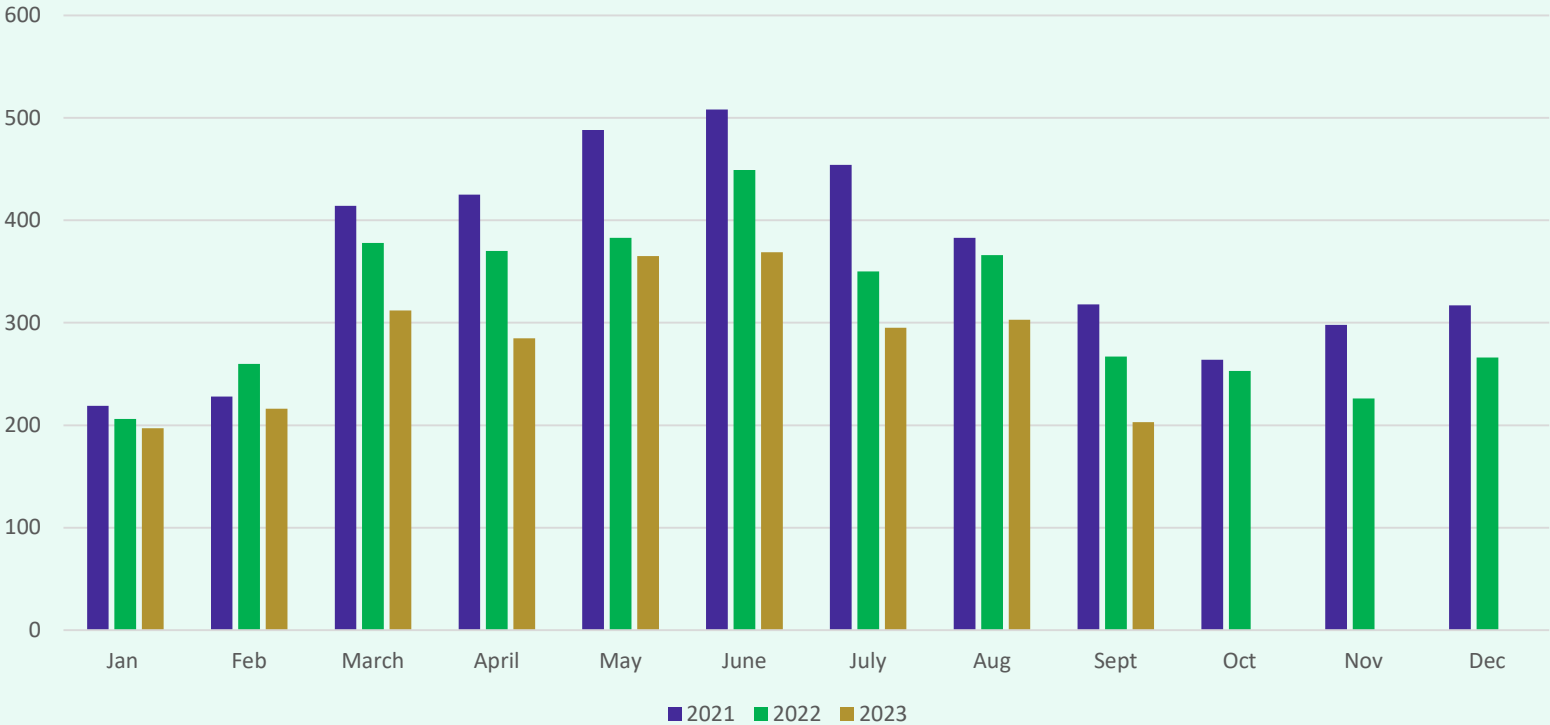
Century Square

- Announced construction of Phase 2 August 2023
- Located along University Drive, Phase 2 will include two 15,593 sq. ft. retail buildings with a plaza & green space
- Will include Sephora, Coco Shrimp, Chop Shop and Well Fargo
- Completion anticipated in Spring 2024
- In total Century Square expects to add 8 – 10 new businesses in the new development
- Will include dozens of new jobs



Housing Market Trends

College Station MSA Housing Sales

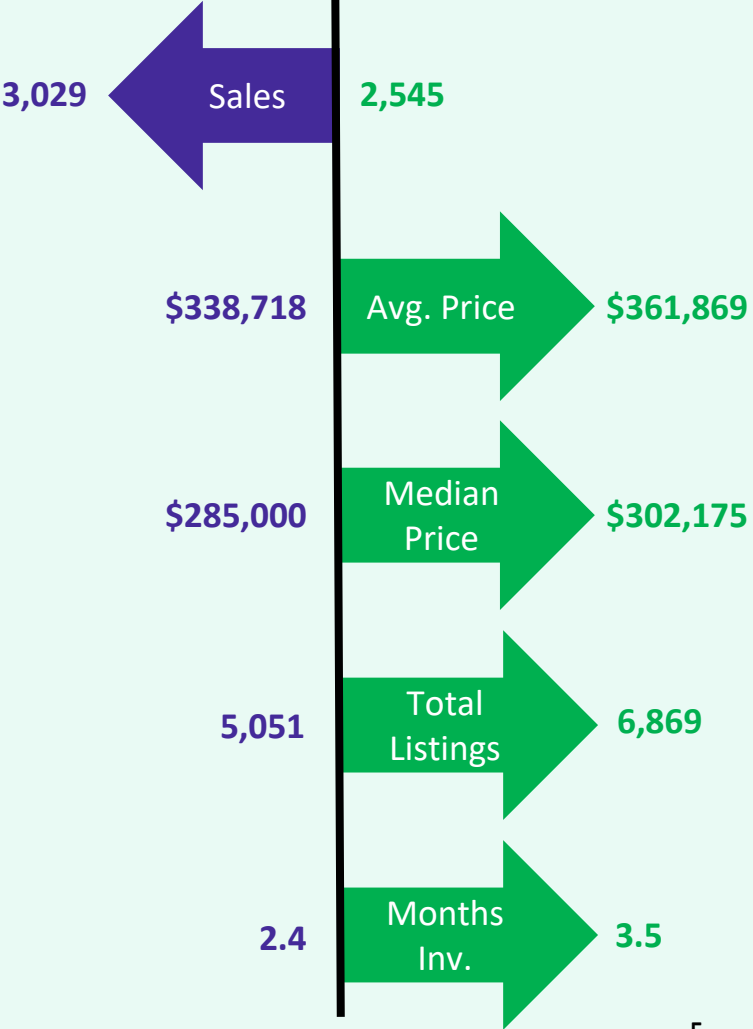


- Median home prices declined in the first half of 2023 in response to reduced demand incurred by mortgage rate hikes and historically high home prices in 2022
- Home inventory is increasing as sales slowed in response to interest rate increases and inflation costs throughout the state
- Through the first nine months of 2023, total monthly home sales are down from the same period in 2022 in College Station (-15.9%), Austin (-11.5%), DFW (-7.3%), Houston (-15.9%) and San Antonio (-10.9%)



YOY Housing Trends

Jan - Sept 2022 | Jan - Sept 2023

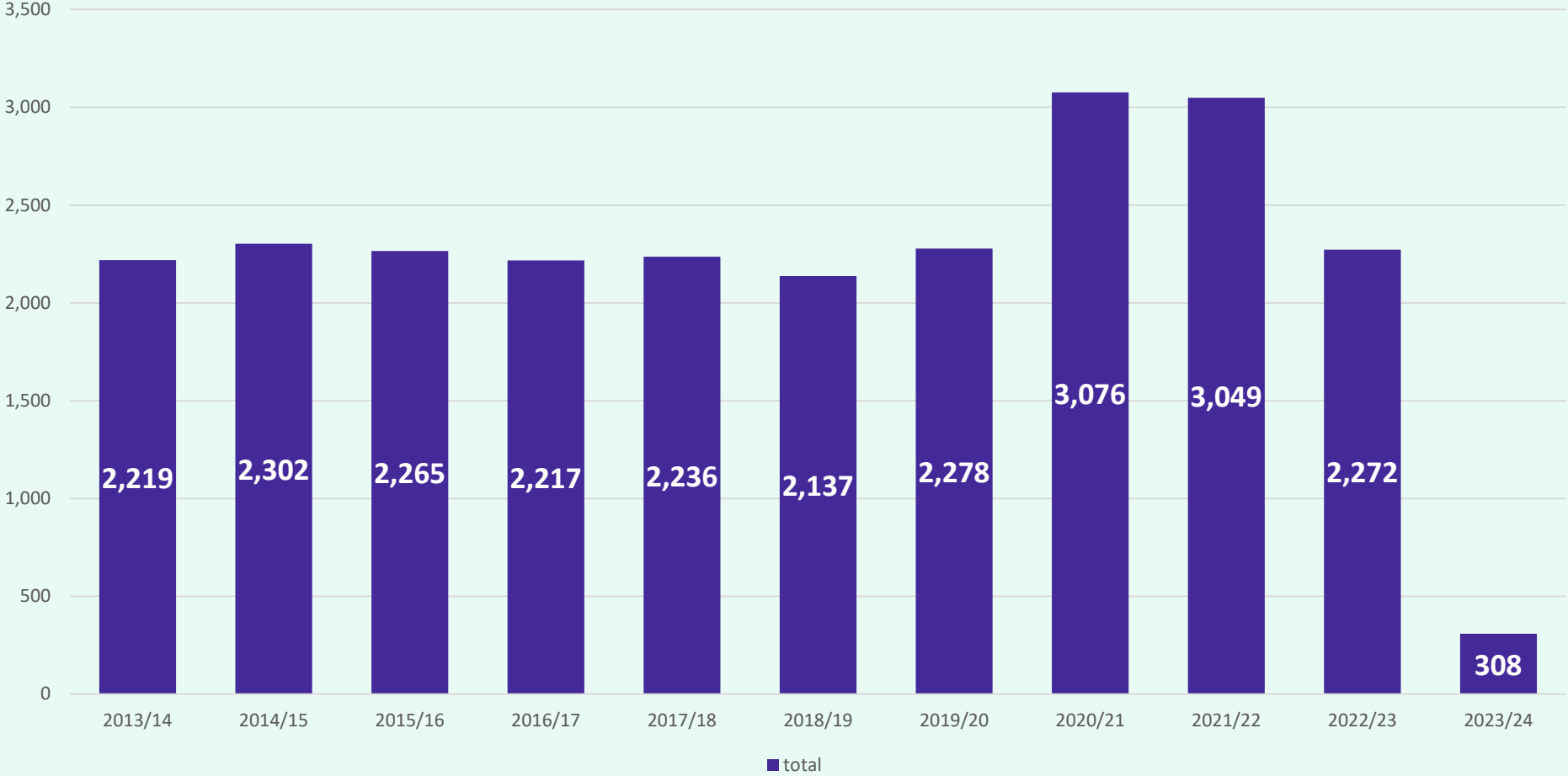




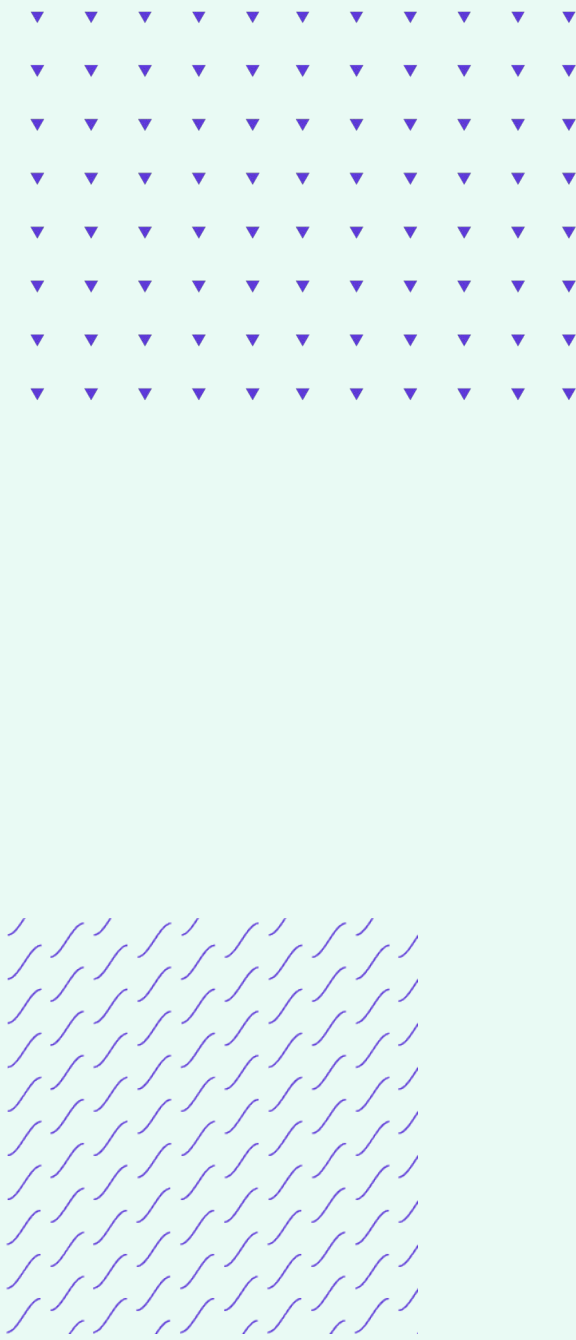
College Station ISD Historical Home Sales

Total Home Sales (Aug 2013 – Oct 2023)

Annual District Home Sales by School Year



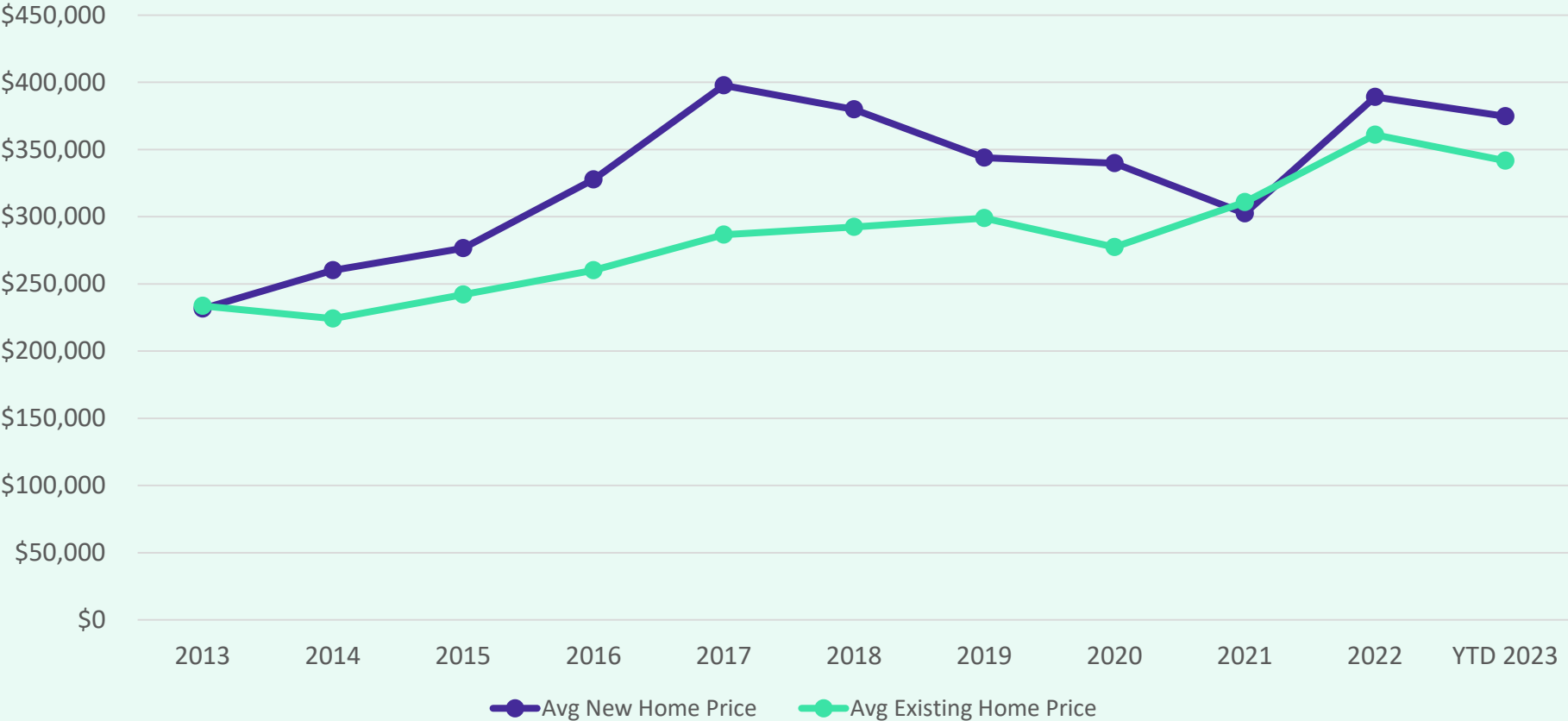
- College Station ISD has had more than 300 total home sales in 2023/24 so far, and if the sales trend continues the district could have more than 1,200 home sales by the end of the school year





College Station ISD Home Price Analysis

Avg. New vs. Existing Home Sale Price, 2013 - 2023



- The average new home sale price in College Station ISD has risen more than 61% since 2013, an increase of more than \$143,000
- The average existing home sale price within CSISD has risen 46% in the last 10 years, rising more than \$108,000

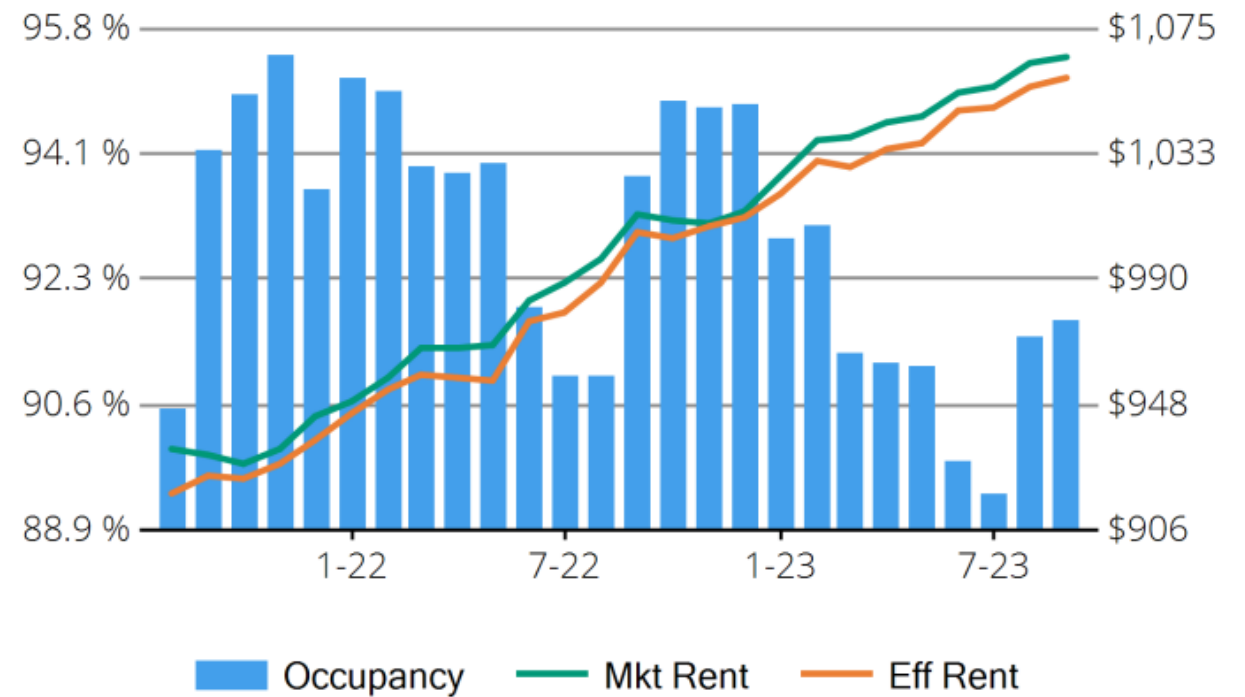
	Avg New Home	Avg Existing Home
2013	\$231,622	\$233,600
2014	\$260,084	\$224,238
2015	\$276,567	\$242,051
2016	\$327,686	\$260,122
2017	\$397,737	\$286,535
2018	\$379,826	\$292,338
2019	\$344,010	\$299,031
2020	\$339,770	\$277,388
2021	\$302,522	\$310,960
2022	\$389,196	\$361,003
YTD 2023	\$374,791	\$341,654



Housing Market Trends: Multi-family Market

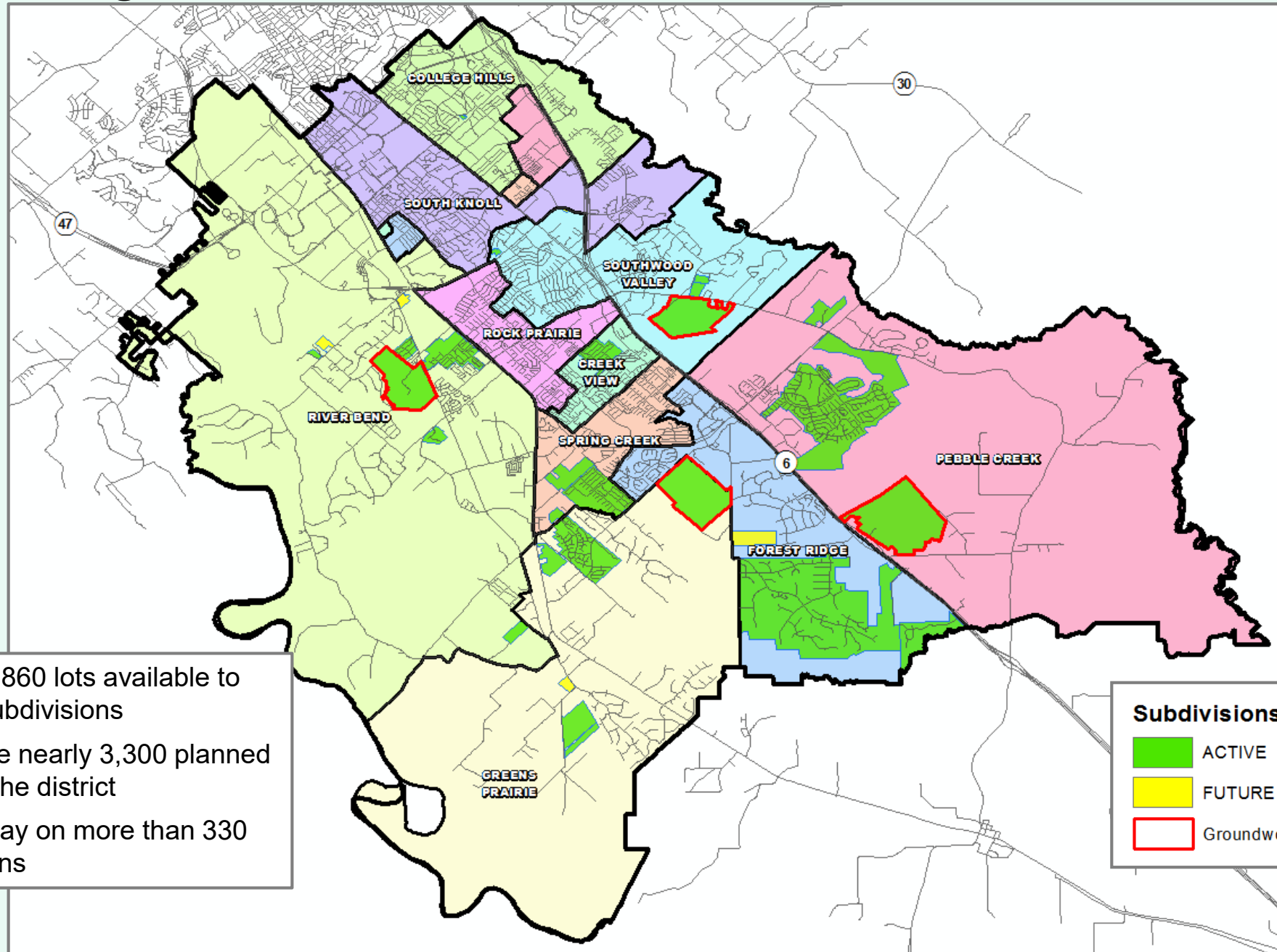
College Station Multi-Family Market	Sept-23	% YOY
Occupancy	91.8	-2.1%
Unit Change	562	
Units Absorbed (Annual)	97	
Average Size	829	-0.6%
Asking Rent	\$1,065	+5.2%
Asking Rent per Sq. Ft.	\$1.28	+5.9%
Effective Rent	\$1,058	+5.2%
Effective Rent per SqFt	\$1.28	+5.9%
% Offering Concessions	11%	+80.9%
Avg Concession Package	4.6%	-25.3%

College Station, TX





District Housing Overview

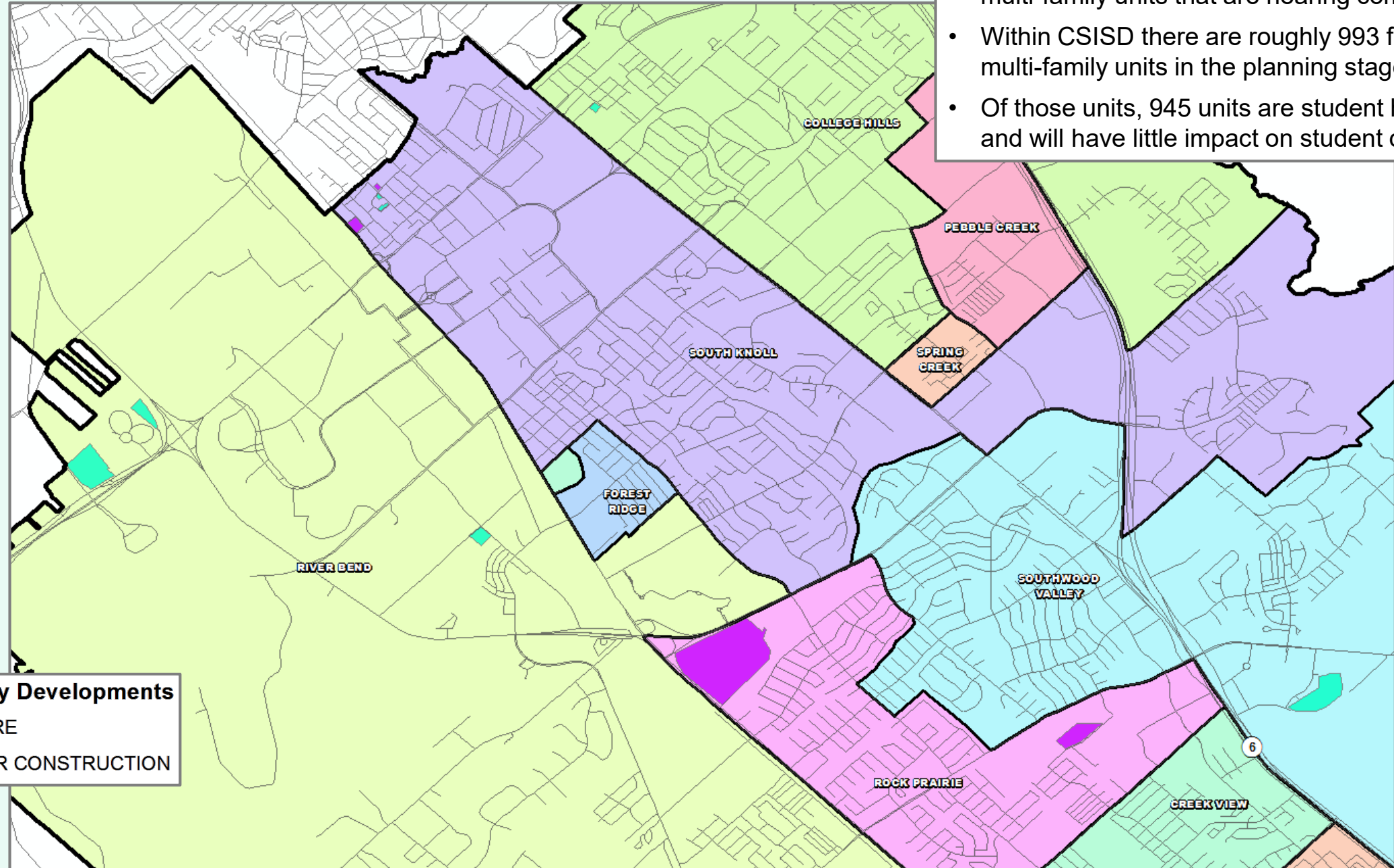


- The district has nearly 860 lots available to build on in 24 active subdivisions
- Within CSISD there are nearly 3,300 planned future lots throughout the district
- Groundwork is underway on more than 330 lots within 4 subdivisions



District Multi-Family Overview

- Within the district there are approx. 1,132 multi-family units that are nearing completion
- Within CSISD there are roughly 993 future multi-family units in the planning stages
- Of those units, 945 units are student housing and will have little impact on student density



Multi-Family Developments

- FUTURE
- UNDER CONSTRUCTION



Residential Activity



Southern Pointe

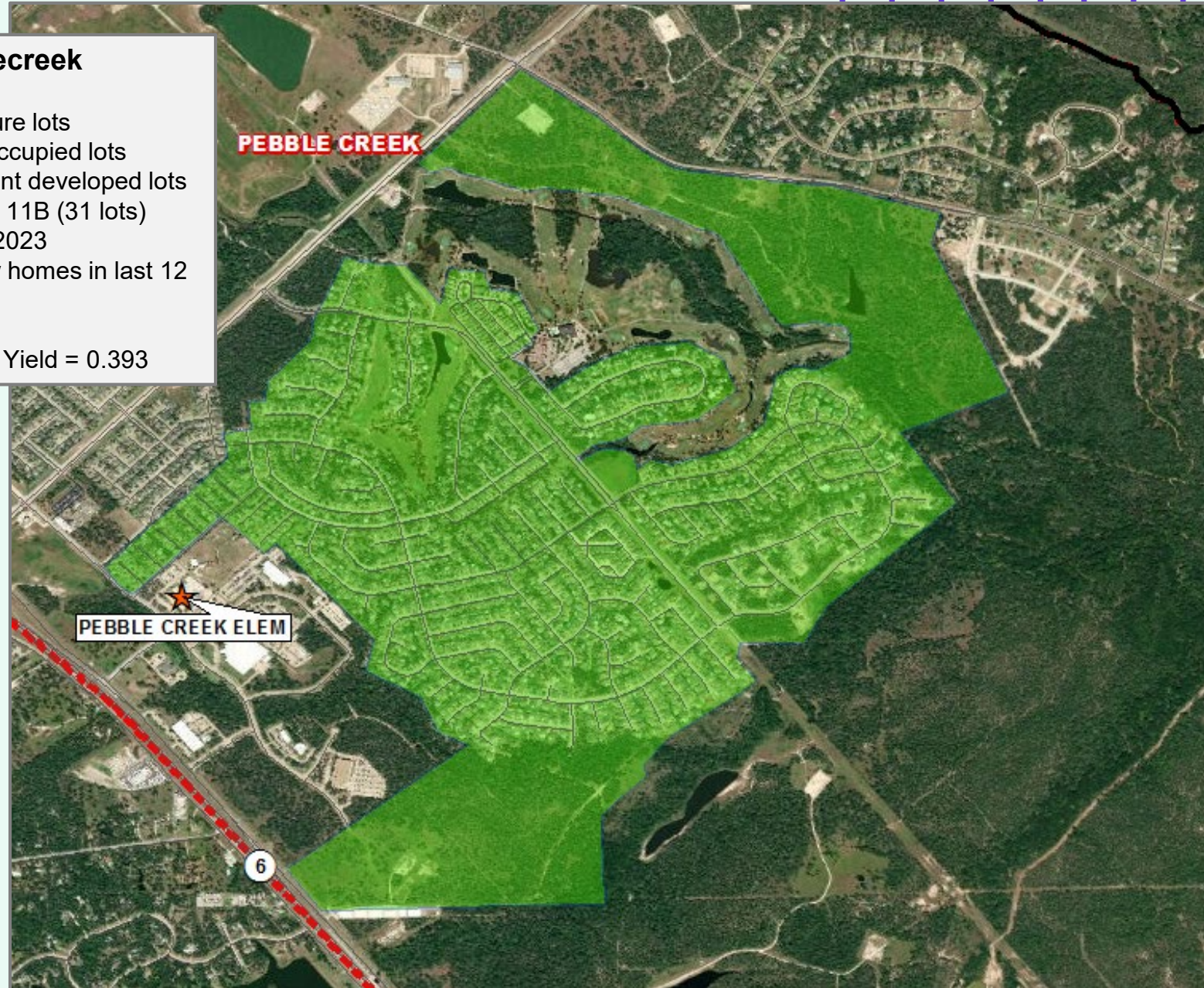
- 1,994 total SF lots
- Approx. 1,436 future lots
- Approx. 366 occupied lots
- Approx. 57 homes under construction
- Approx. 135 vacant developed lots
- Homebuilding estimated to begin on Phase 106 (57 lots) Nov 2023
- Groundwork underway on Phase 400 (67 lots) & Phase 202 (97 lots); anticipate homebuilding begin Spring 2024
- Permitted 137 new homes in the last 12 months
- \$270K+
- Current Student Yield = 0.481



Residential Activity

Pebblecreek

- 1,800 total lots
- Approx. 327 future lots
- Approx. 1,426 occupied lots
- Approx. 47 vacant developed lots
- Final plat Phase 11B (31 lots) approved June 2023
- Permitted 9 new homes in last 12 months
- \$200K+
- Current Student Yield = 0.393



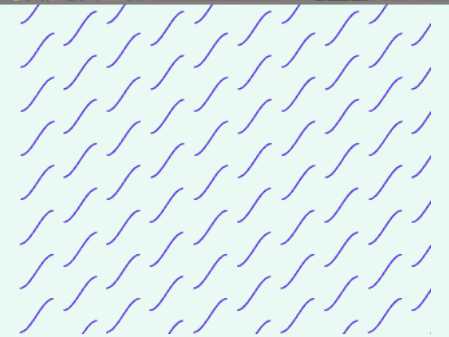


Residential Activity



Greens Prairie Reserve

- 906 total lots
- Approx. 720 future lots
- Approx. 105 occupied homes
- Approx. 22 homes under construction
- Approx. 59 vacant developed lots
- Permitted 34 new homes in last 12 months
- Anticipate building 40 – 60 homes per year
- \$350K+
- Current Student Yield = 0.505

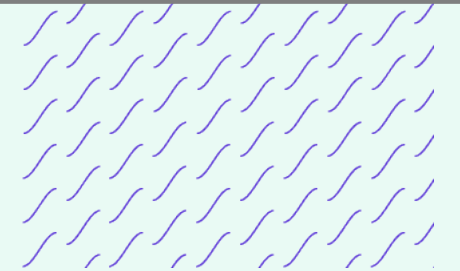
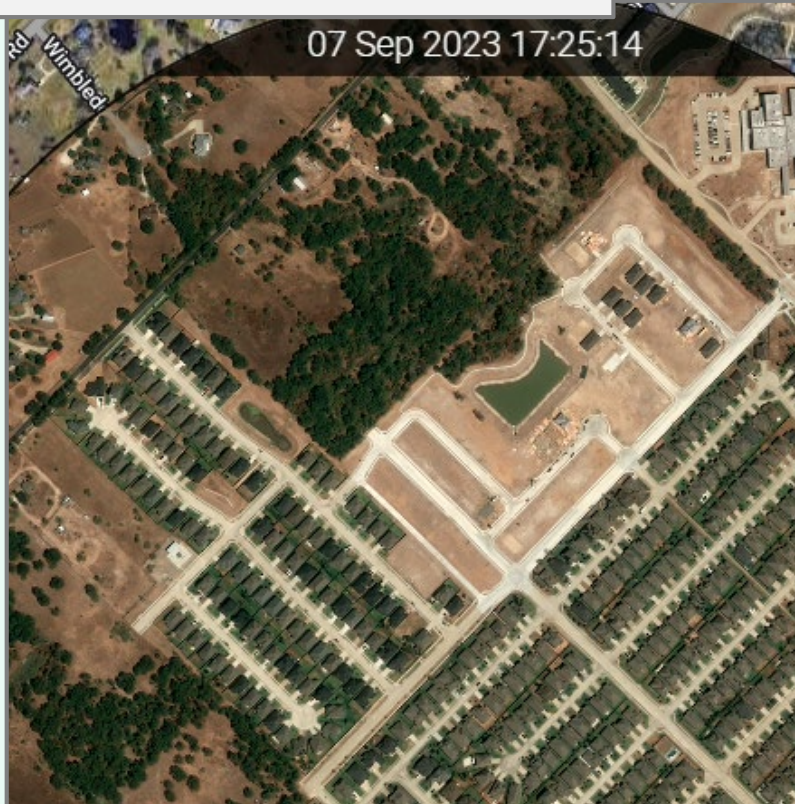




Residential Activity

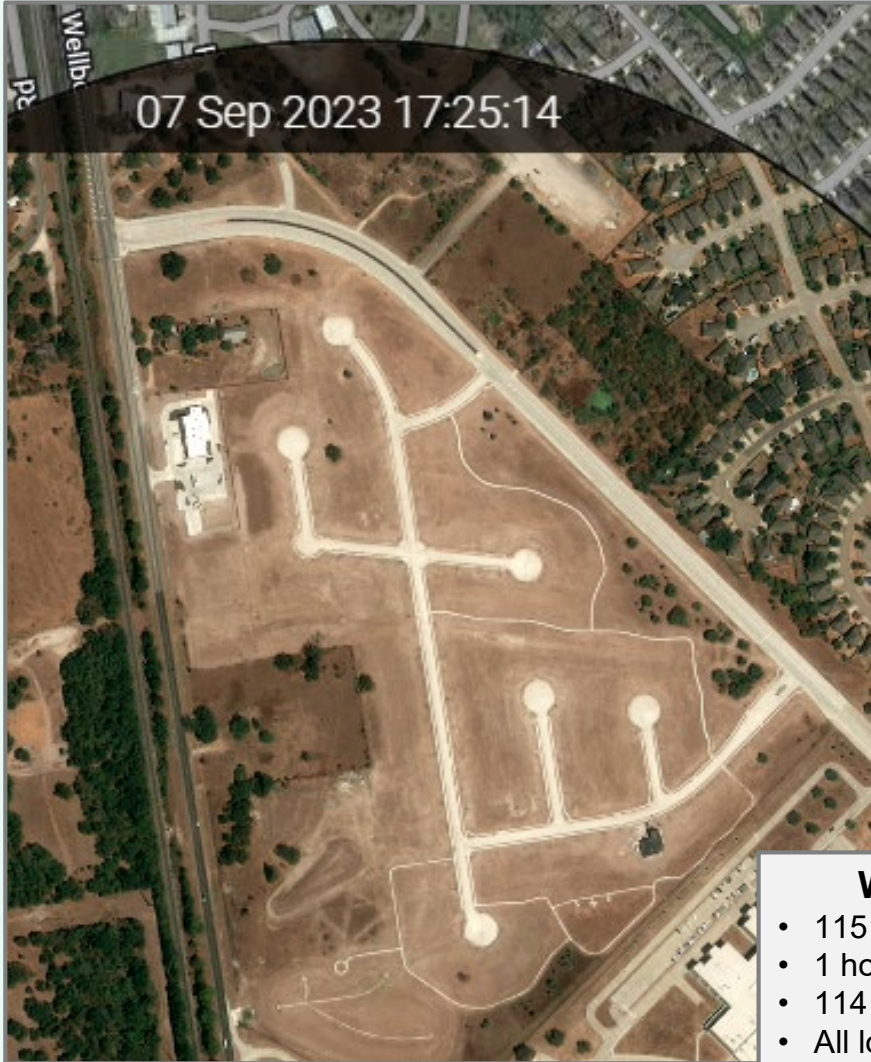
Brewster Pointe

- 290 total lots
- Approx. 90 future lots
- Approx. 108 occupied homes
- Approx. 19 home under construction
- Approx. 73 vacant developed lots
- Homebuilding on Phase 2 (91 lots) started Aug 2023
- Remaining 90 lots in planning stages
- Estimated build out mid 2024
- Anticipate building 50 homes per year
- \$250K+
- Current Student Yield = 0.667





Residential Activity



Wellborn Settlement

- 115 total lots
- 1 home under construction
- 114 vacant developed lots
- All lots delivered for homebuilding late Spring 2023
- Homebuilding began June 2023
- First residents anticipated late 2023 – early 2024





Residential Activity

Mission Ranch

- 538 total lots
- Approx. 222 future lots
- Approx. 217 occupied lots
- Approx. 16 homes under construction
- Approx. 83 vacant developed lots
- Groundwork currently underway on Phase 105 (25 lots)
- Permitted 54 new homes in last 12 months
- Anticipated building 50 – 70 homes per year
- Estimated 5 year build out
- \$350K+
- Current Student Yield = 0.599

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Residential Activity

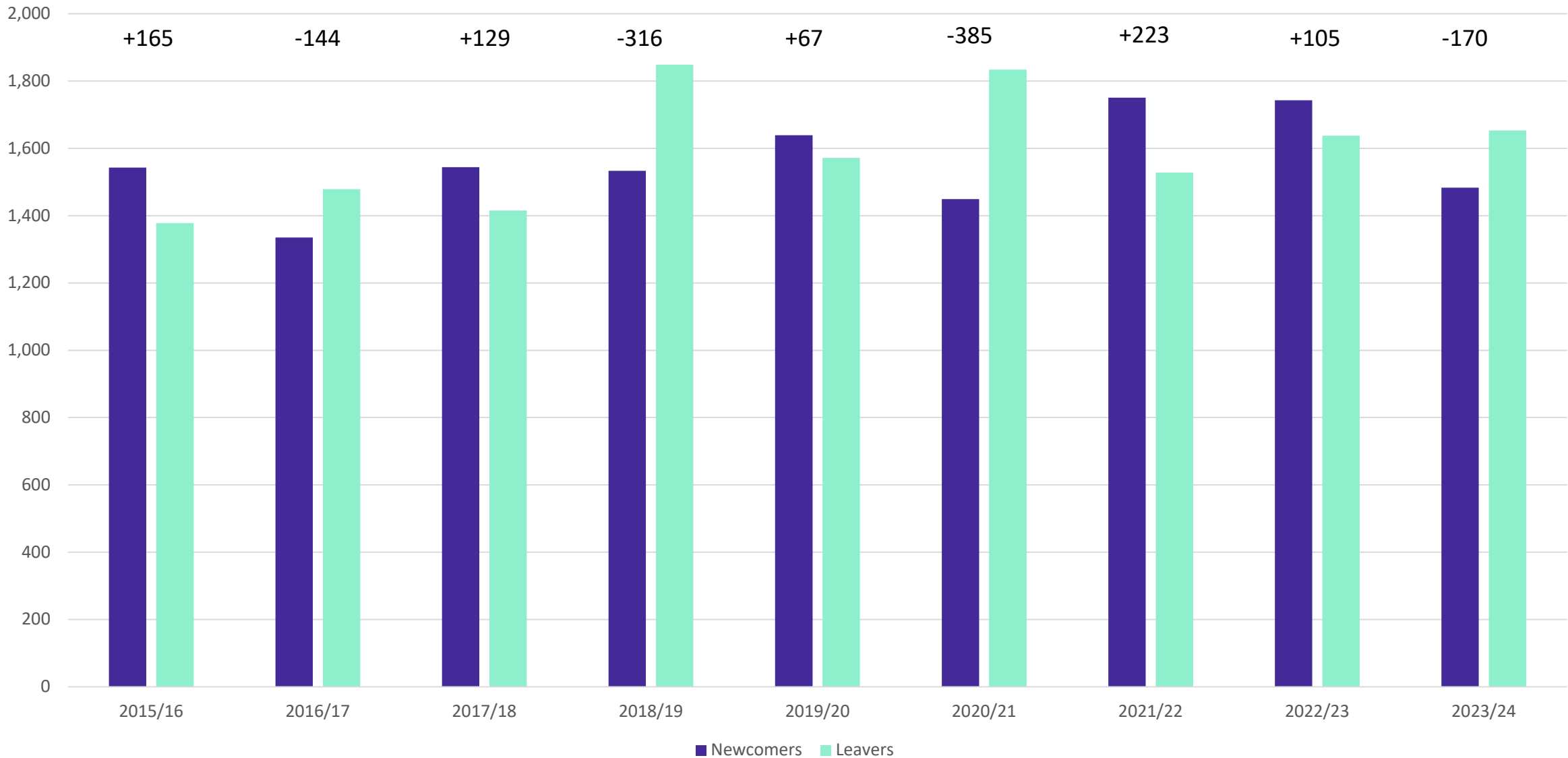


Midtown Reserve

- 724 total lots
- Approx. 373 future lots
- Approx. 307 occupied homes
- Approx. 28 homes under construction
- Approx. 16 vacant developed lots
- Groundwork underway on Phase 111 (21 lots) & Phase 10 (78 lots)
- Site plan for Phase 404A (22 townhome lots) approved Sept 2023
- Closed 94 new homes in last 12 months
- Estimate building 100 – 120 homes per year
- \$220K+
- DR Horton
- Current Student Yield = 0.235



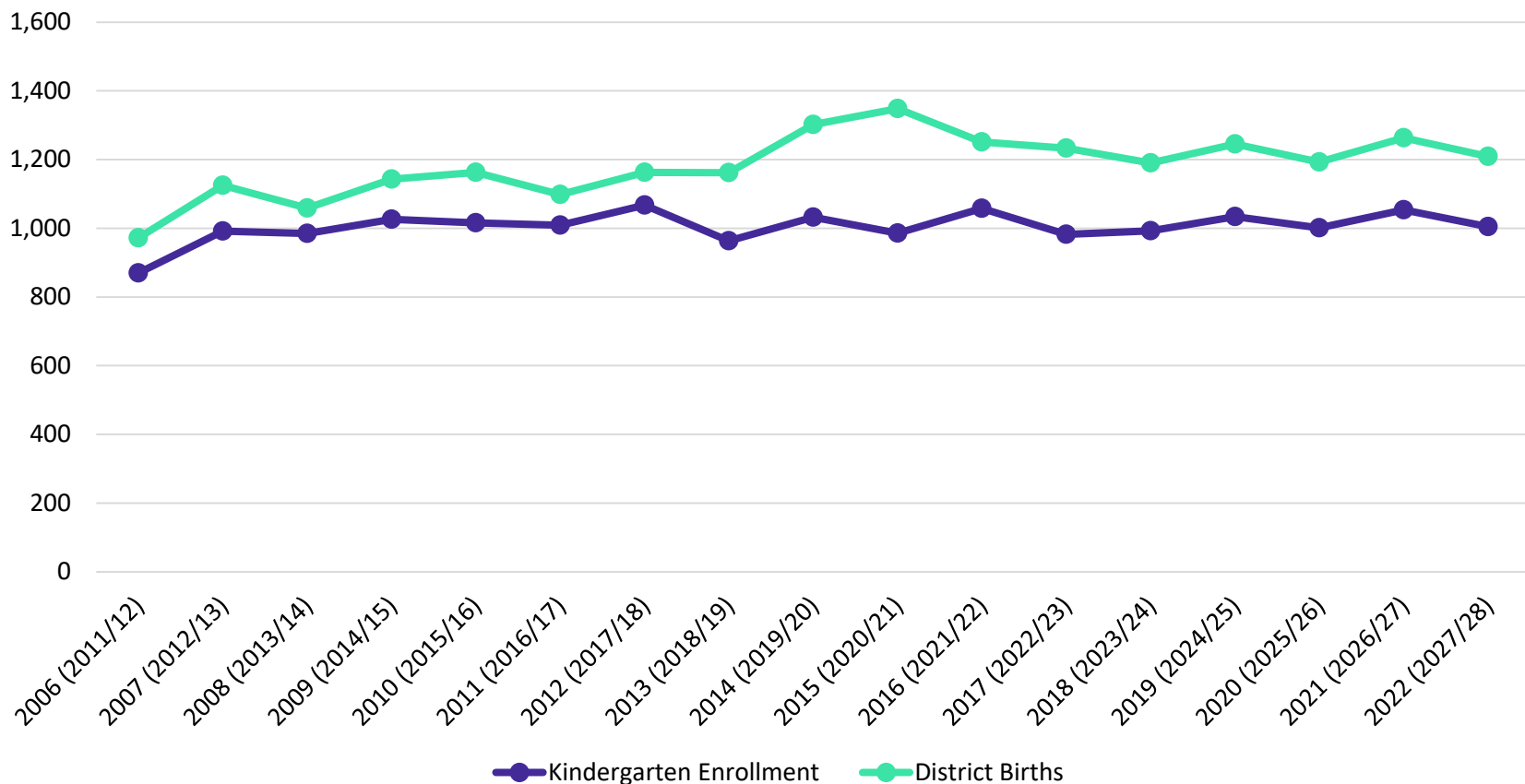
Newcomer and Leaver Analysis





Birth Rate Analysis

College Station K Enroll vs. District Births



	Kindergarten Enrollment	District Births	Ratio
2006 (2011/12)	870	972	0.895
2007 (2012/13)	992	1,125	0.882
2008 (2013/14)	985	1,059	0.930
2009 (2014/15)	1,026	1,143	0.898
2010 (2015/16)	1,016	1,163	0.874
2011 (2016/17)	1,009	1,098	0.919
2012 (2017/18)	1,067	1,163	0.917
2013 (2018/19)	963	1,162	0.829
2014 (2019/20)	1,032	1,302	0.793
2015 (2020/21)	986	1,348	0.731
2016 (2021/22)	1,058	1,251	0.846
2017 (2022/23)	982	1,233	0.796
2018 (2023/24)	993	1,190	0.834
2019 (2024/25)	1,034	1,245	0.831
2020 (2025/26)	1,001	1,193	0.839
2021 (2026/27)	1,054	1,263	0.835
2022 (2027/28)	1,005	1,209	0.831



Ten Year Forecast by Grade Level

Year (Oct.)	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	% Growth
2019/20	142	425	1,032	1,015	1,019	1,011	1,024	1,091	1,104	1,079	994	1,103	1,014	982	901	13,936	396	2.9%
2020/21	95	384	986	1,025	942	980	998	1,005	1,053	1,089	1,064	1,066	1,053	958	966	13,664	-272	-2.0%
2021/22	80	452	1,058	1,047	1,066	962	1,006	1,035	1,043	1,099	1,112	1,202	1,045	1,009	990	14,206	542	4.0%
2022/23	100	500	982	1,109	1,032	1,078	999	1,008	1,058	1,086	1,116	1,230	1,163	1,013	1,015	14,489	283	2.0%
2023/24	113	448	993	1,013	1,099	1,016	1,052	992	1,006	1,082	1,076	1,226	1,181	1,109	982	14,388	-101	-0.7%
2024/25	42	447	1,008	1,039	1,016	1,109	1,032	1,048	1,004	1,032	1,094	1,184	1,180	1,133	1,100	14,469	81	0.6%
2025/26	45	460	1,011	1,052	1,036	1,020	1,128	1,027	1,059	1,037	1,042	1,218	1,151	1,129	1,119	14,532	63	0.4%
2026/27	47	456	1,031	1,053	1,056	1,047	1,033	1,124	1,034	1,087	1,041	1,152	1,180	1,097	1,116	14,554	21	0.1%
2027/28	45	466	1,043	1,074	1,057	1,064	1,056	1,029	1,135	1,065	1,097	1,153	1,116	1,129	1,085	14,614	60	0.4%
2028/29	47	473	1,053	1,090	1,075	1,066	1,078	1,054	1,039	1,168	1,072	1,215	1,119	1,066	1,115	14,730	116	0.8%
2029/30	48	476	1,068	1,096	1,094	1,086	1,081	1,077	1,065	1,068	1,175	1,187	1,177	1,069	1,054	14,821	91	0.6%
2030/31	48	483	1,080	1,120	1,105	1,110	1,105	1,081	1,088	1,092	1,076	1,299	1,151	1,125	1,057	15,020	199	1.3%
2031/32	49	489	1,084	1,131	1,127	1,120	1,127	1,105	1,091	1,116	1,100	1,192	1,258	1,099	1,111	15,198	179	1.2%
2032/33	49	490	1,093	1,136	1,140	1,143	1,138	1,128	1,117	1,119	1,123	1,216	1,156	1,204	1,086	15,338	140	0.9%
2032/34	49	495	1,103	1,148	1,146	1,159	1,163	1,141	1,140	1,144	1,126	1,242	1,178	1,104	1,189	15,527	188	1.2%

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



Ten Year Forecast by Primary Campus

		85%	110%	Fall	ENROLLMENT PROJECTIONS									
Campus	Capacity	Capacity	Capacity	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34
College Hills Elementary	660	561	726	597	558	547	542	545	541	539	537	534	531	530
Creek View Elementary	640	544	704	465	475	481	493	507	507	512	516	518	516	515
Forest Ridge Elementary	640	544	704	500	493	477	461	457	446	435	425	414	403	393
Greens Prairie Elementary	660	561	726	523	503	495	484	489	512	534	553	573	592	611
Pebble Creek Elementary	620	527	682	607	628	684	722	758	793	831	899	949	1,005	1,065
River Bend Elementary	660	561	726	554	574	588	585	596	611	622	633	648	659	672
Rock Prairie Elementary	620	527	682	586	563	560	549	556	556	557	561	563	563	563
South Knoll Elementary	660	561	726	615	614	623	616	628	626	622	617	614	608	604
Southwood Valley Elementary	660	561	726	607	593	576	547	529	535	539	544	547	548	544
Spring Creek Elementary	660	561	726	680	693	721	723	740	753	760	765	767	764	768
ELEMENTARY TOTAL	6480			5,734	5,694	5,752	5,723	5,806	5,881	5,949	6,051	6,126	6,189	6,263
Elementary Absolute Growth				-66	-40	58	-29	83	76	67	102	75	63	73
Elementary Percent Growth				-1.14%	-0.70%	1.02%	-0.50%	1.45%	1.31%	1.14%	1.72%	1.25%	1.03%	1.18%
Cypress Grove Intermediate	920	782	1,012	517	539	548	558	559	541	542	541	547	555	555
Oakwood Intermediate	920	782	1,012	699	727	736	747	761	762	798	806	825	855	876
Pecan Trail Intermediate	925	786	1,018	782	786	802	853	845	790	802	821	825	835	850
INTERMEDIATE SCHOOL TOTAL	2,765			1,998	2,052	2,085	2,158	2,164	2,093	2,142	2,169	2,196	2,245	2,281
Intermed. School Absolute Growth				-68	54	34	72	6	-71	49	27	28	49	36
Intermed. School Percent Growth				-3.29%	2.70%	1.63%	3.47%	0.28%	-3.30%	2.35%	1.27%	1.27%	2.21%	1.60%

Yellow box = exceeds 110% capacity



Ten Year Forecast by Secondary Campus

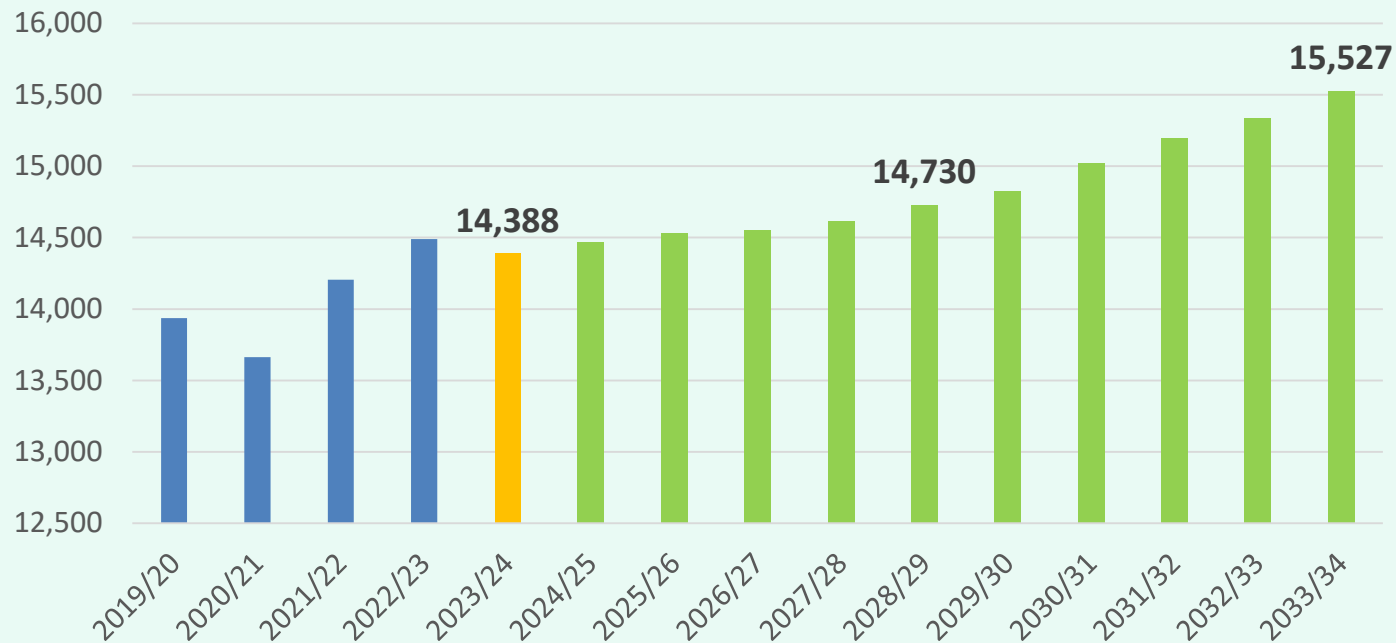
		85%	110%	Fall	ENROLLMENT PROJECTIONS									
Campus	Capacity	Capacity	Capacity	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34
A&M Consolidated Middle School	920	782	1,012	697	681	660	683	693	704	715	718	752	759	777
College Station Middle School	940	799	1,034	630	613	607	638	648	658	661	639	640	640	646
Wellborn Middle School	925	786	1,018	831	833	812	808	820	878	868	811	824	844	847
MIDDLE SCHOOL TOTAL	2785			2,158	2,127	2,078	2,128	2,161	2,241	2,243	2,168	2,216	2,242	2,270
Middle School Absolute Growth				-43	-31	-48	50	33	79	3	-75	48	26	28
Middle School Percent Growth				-1.95%	-1.46%	-2.27%	2.39%	1.56%	3.66%	0.12%	-3.36%	2.20%	1.19%	1.25%
A&M Consolidated High School	2,350	1,998	2,585	2,150	2,171	2,177	2,152	2,126	2,144	2,126	2,198	2,217	2,221	2,252
College Station High School	1,950	1,658	2,145	2,184	2,215	2,217	2,170	2,134	2,148	2,138	2,211	2,220	2,219	2,239
College View High School				142	189	201	201	201	201	201	201	201	200	200
Center for Alternative Learning				22	22	22	22	22	22	22	22	22	22	22
HIGH SCHOOL TOTAL	4,300			4,498	4,597	4,617	4,545	4,483	4,515	4,487	4,632	4,660	4,662	4,713
High School Absolute Growth				76	99	20	-72	-62	32	-28	145	28	2	51
High School Percent Growth				1.72%	2.20%	0.44%	-1.56%	-1.36%	0.71%	-0.62%	3.23%	0.60%	0.04%	1.09%
DISTRICT TOTALS				14,388	14,469	14,532	14,554	14,614	14,730	14,821	15,020	15,198	15,338	15,527
District Absolute Growth				-101	81	63	21	60	116	91	199	179	140	188
District Percent Growth				-0.70%	0.56%	0.44%	0.15%	0.41%	0.79%	0.62%	1.34%	1.19%	0.92%	1.23%

Yellow box = exceeds 110% capacity



Key Takeaways

Enrollment Projections



- College Station economic and housing market are experiencing continued growth
- The district could have nearly 1,200 homes sales by the end of 2023/24 school year
- District has nearly 860 lots available to build on and nearly 3,300 planned future lots
- Groundwork is underway on more than 330 lots within 4 subdivisions
- This enrollment is down likely resulting from three factors: Higher interest rates impacting sales rate for younger families, increase in “Home School” participation, “Choose” options via charter schools
- Longer term outlook is still to see positive enrollment growth
- District enrollment is likely to exceed 14,700 by 2028/29 school year
- By 2033/34 district enrollment could exceed 15,500