



Seguin ISD

District
Demographics
Update

Spring
2022

April 26, 2022

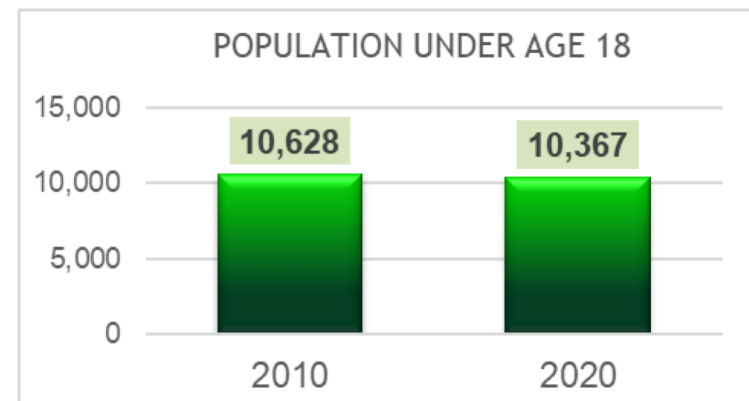
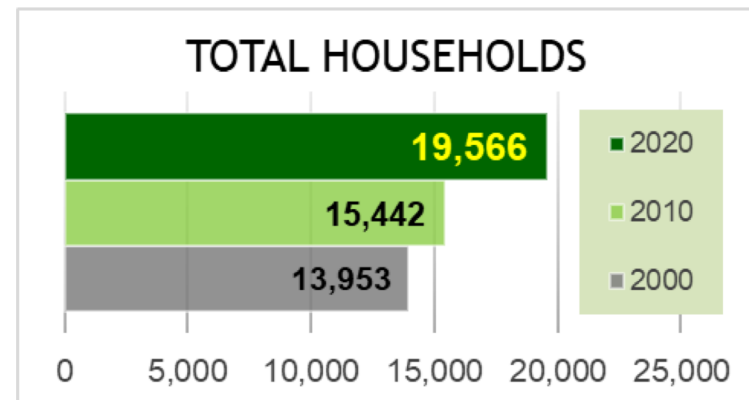
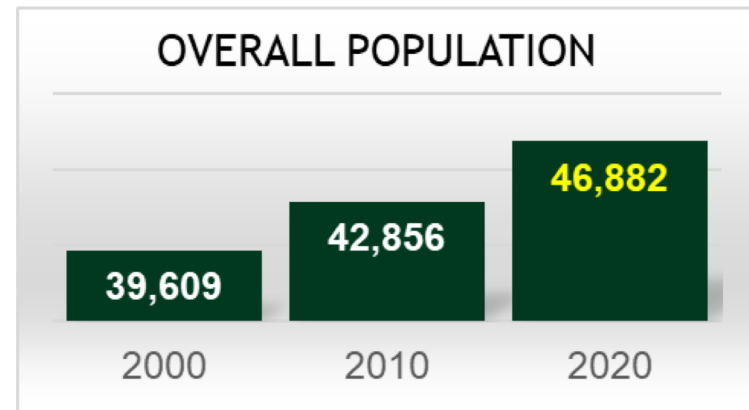


School District Strategies
Solutions Through Demographics



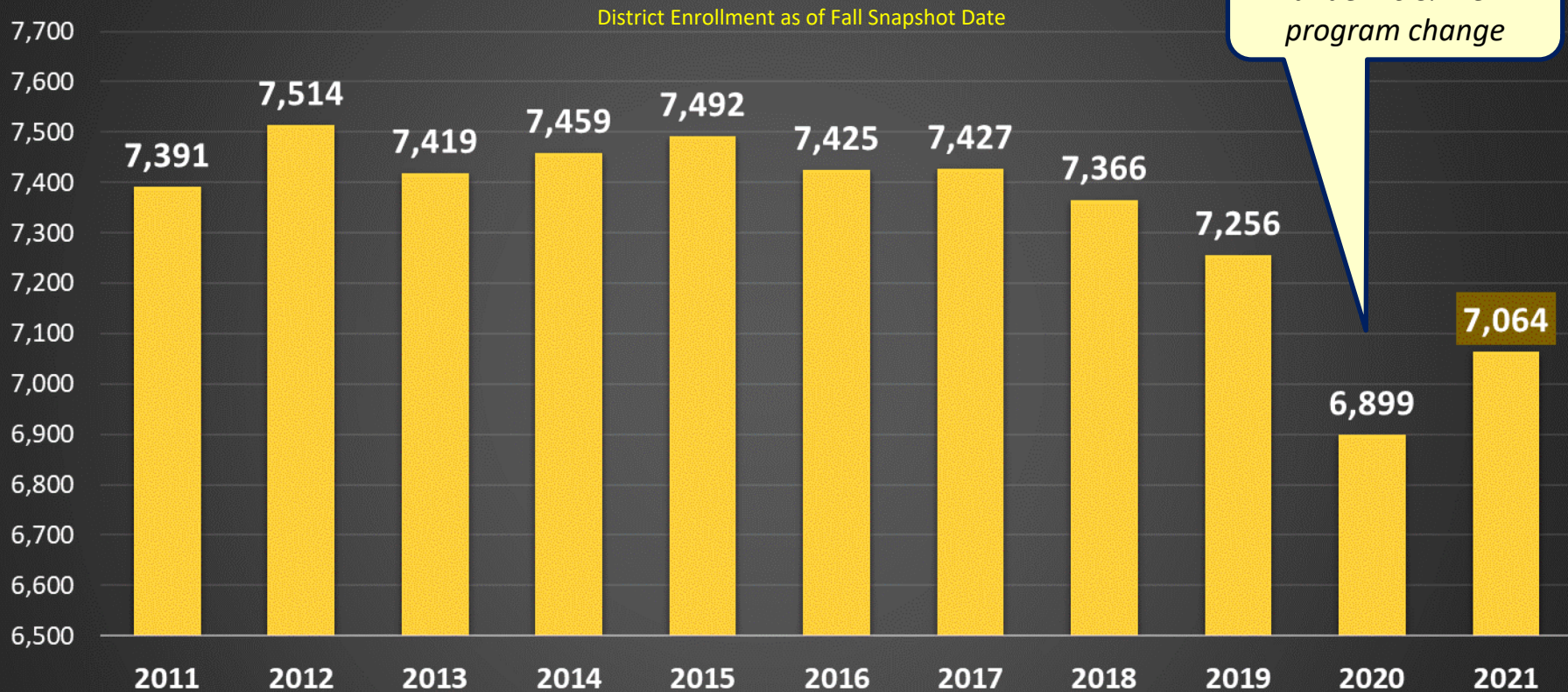
SEGUIN ISD: 2020 CENSUS INITIAL RESULTS

- SISD's overall population in 2020 was 46,882 (+9.4% or +4,026 vs. 2010)
- As of the 2020 Census, the district had 19,566 total households, an increase of 26.7% over the past decade (+4,124 vs. 2010 Census)
- Under 18 population in SISD declined by 2.5% from 2010-2020 (-261)
- Under 18 population was 22.1% of the district's overall population (vs. 24.8% in 2010)





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



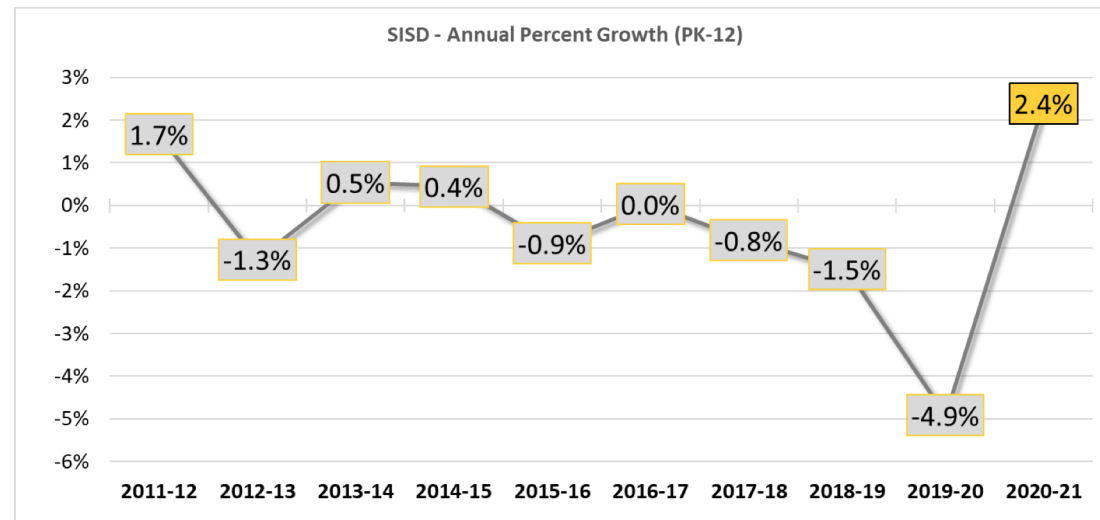
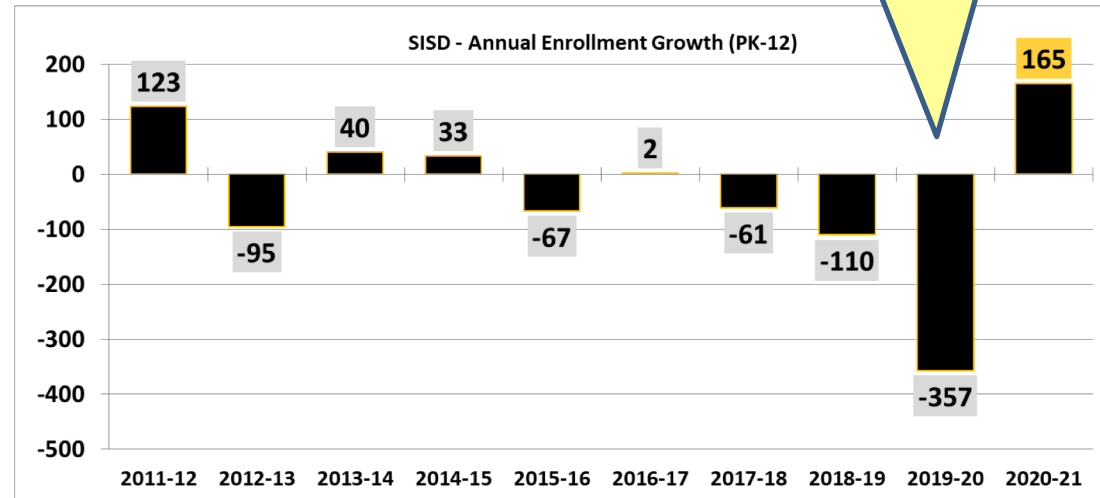
➤ District enrollment as of the Fall 2021 snapshot date was 7,064



SISD ENROLLMENT HISTORY: ANNUAL GROWTH 2011/12 - 2021/22

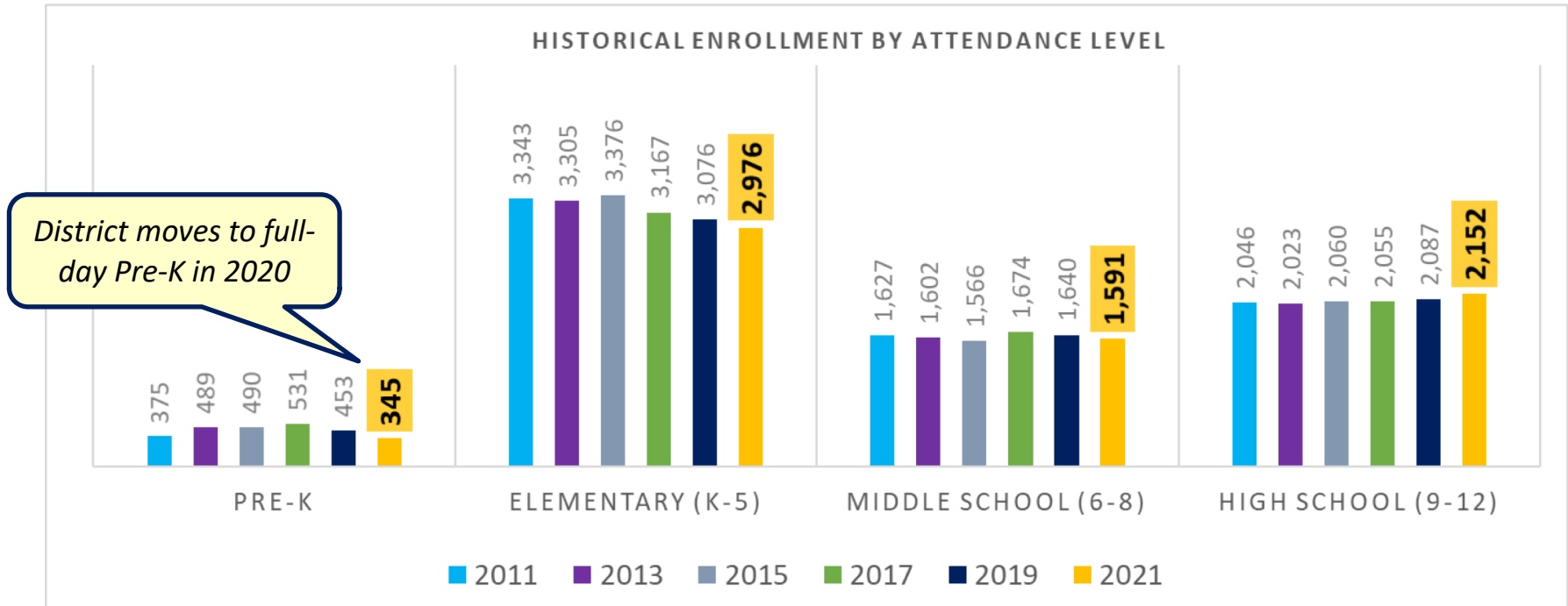
COVID-19 Pandemic Impact
& Pre-K Program Change

- After the district experienced a 4.9% enrollment decline, mainly due to the COVID-19 environment and Pre-K program changes, enrollment rebounded in 2021/22
- 2021/22 enrollment is up 165 students or +2.4% compared to last year
- Over the past 5 years, SISD has averaged a 1.0% annual decline





SISD ENROLLMENT HISTORY: GROWTH BY ATTENDANCE LEVEL 2011/12 - FALL 2021/22



- Most of the district's recent enrollment decline can be attributed to fewer elementary students in Grades K-5 since 2015
- Middle School enrollment is also down slightly over the past few years
- High school enrollment has continued to trend upwards over the past 4 years and now stands at a record high of 2,152



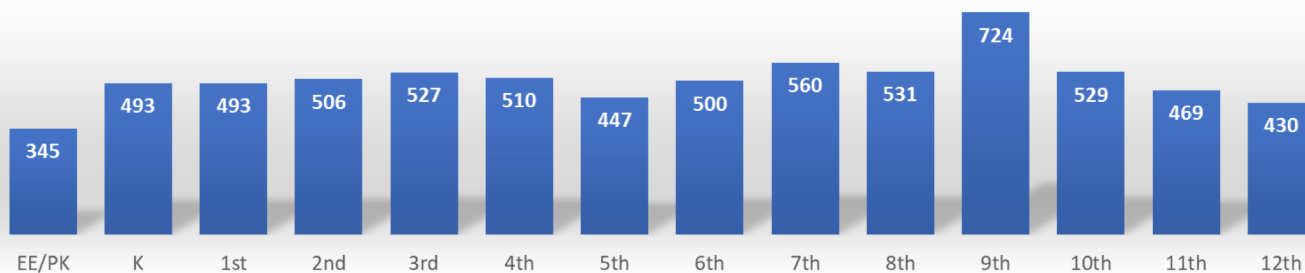
SISD ENROLLMENT HISTORY: ATTENDANCE BY GRADE LEVEL



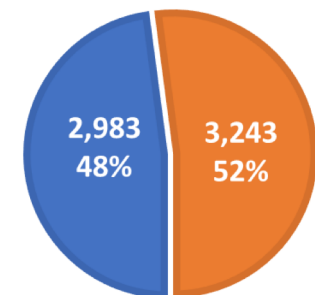
 = district enrollment peak
 = record high

	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
2006	419	578	590	573	571	547	540	568	540	543	701	575	429	405	7,579		
2007	406	579	580	563	551	568	525	547	557	548	681	533	452	411	7,501	-78	-1.0%
2008	427	553	599	574	561	543	576	528	542	573	702	506	482	390	7,556	55	0.7%
2009	418	537	555	576	578	546	534	566	540	565	670	563	467	414	7,529	-27	-0.4%
2010	443	571	539	546	560	567	546	538	557	553	655	506	508	414	7,503	-26	-0.3%
2011	375	592	592	534	524	549	552	532	544	551	659	524	452	411	7,391	-112	-1.5%
2012	516	580	585	574	539	517	536	540	543	530	665	481	470	438	7,514	123	1.7%
2013	489	559	568	575	575	522	506	525	543	534	620	540	470	393	7,419	-95	-1.3%
2014	525	526	561	544	594	554	534	489	528	537	606	502	507	452	7,459	40	0.5%
2015	490	540	549	569	543	610	565	547	485	534	598	526	454	482	7,492	33	0.4%
2016	490	487	515	544	564	530	599	568	538	506	677	495	469	443	7,425	-67	-0.9%
2017	531	501	500	521	556	552	537	576	567	531	638	498	493	426	7,427	2	0.0%
2018	492	484	509	492	501	550	555	540	564	575	674	495	464	471	7,366	-61	-0.8%
2019	453	495	532	520	476	509	544	542	529	569	722	483	437	445	7,256	-110	-1.5%
2020	234	454	481	515	517	465	499	543	529	530	661	575	471	425	6,899	-357	-4.9%
2021	345	493	493	506	527	510	447	500	560	531	724	529	469	430	7,064	165	2.4%

FALL 2021 GRADE LEVEL TOTALS

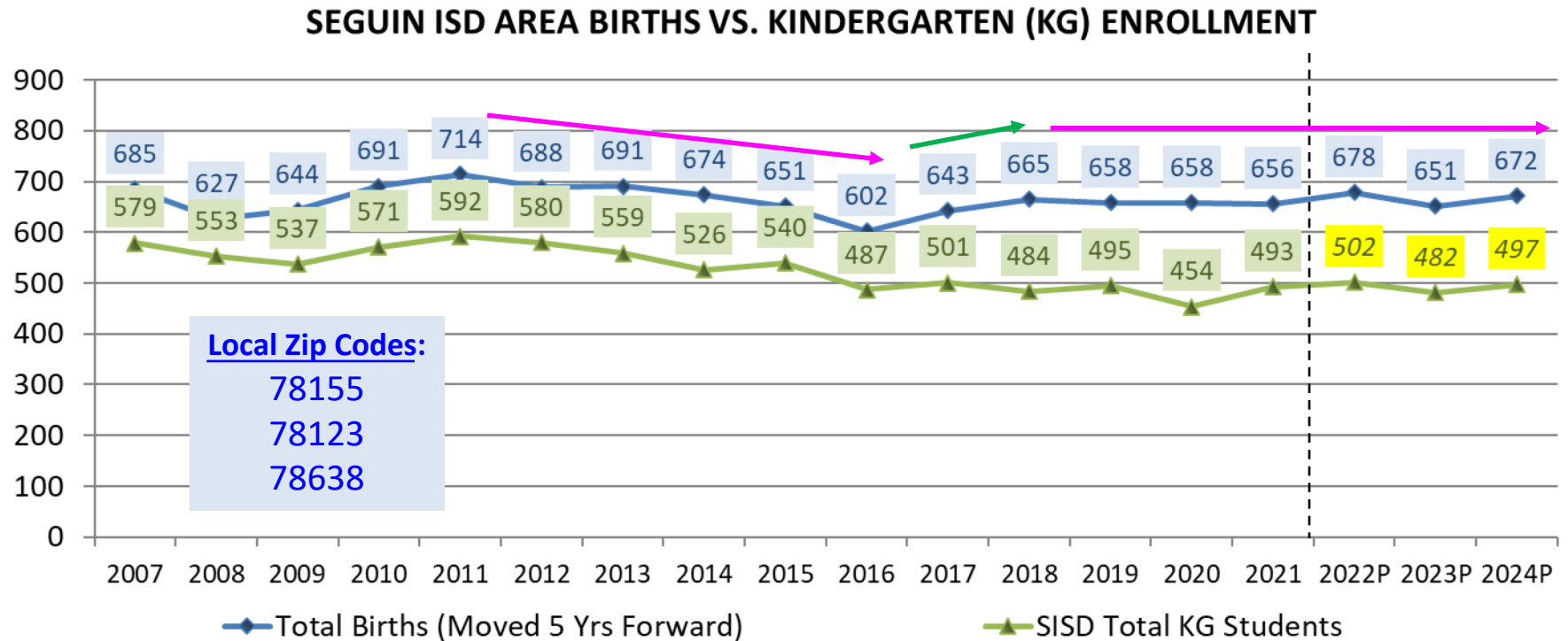


FALL 2021





KINDERGARTEN ENROLLMENT VS. LOCAL BIRTH RATE



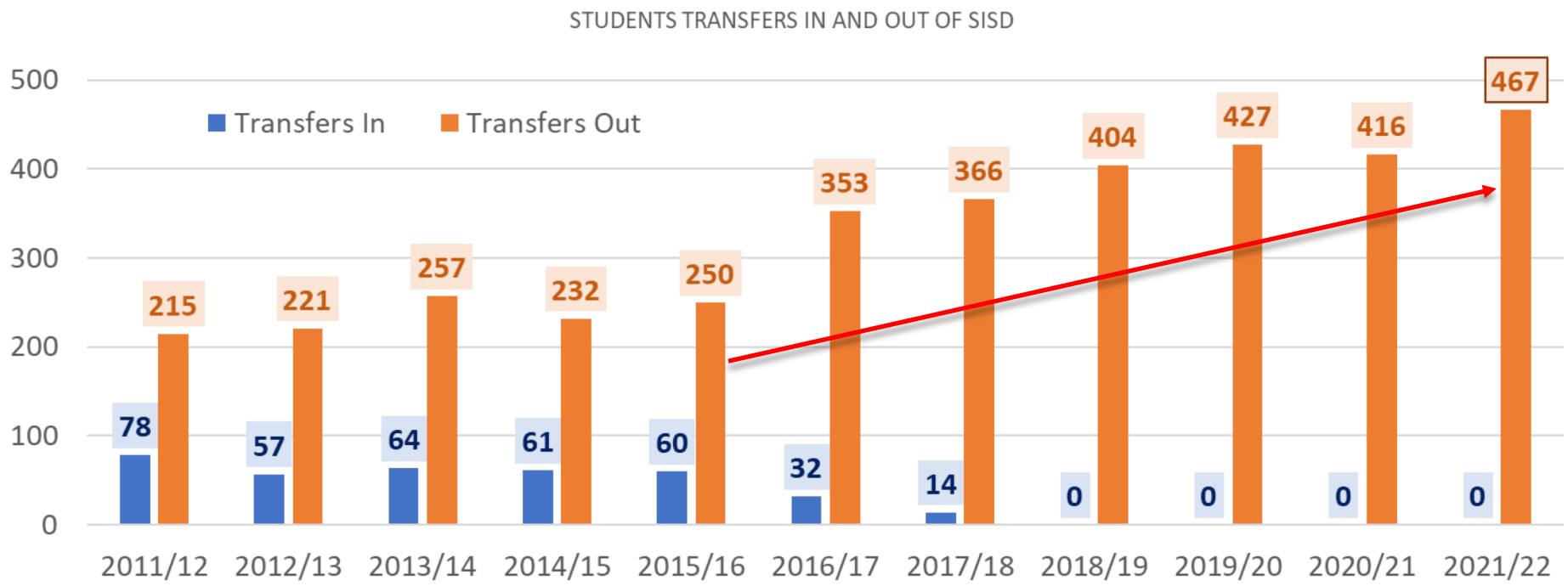
Source: Texas Dept. of State Health Services, TEA, SISD

- SISD kindergarten enrollment has closely mirrored the local annual birth rate trend
- From 2013-2017, the local birth rate was flat, near 660 births per year
- In 2017 and 2019, the annual birth totals reached the highest levels in 10 years
- Over the next three years, KG enrollment should be near 500 students (or higher)



SISD STUDENT TRANSFERS IN AND OUT OF DISTRICT

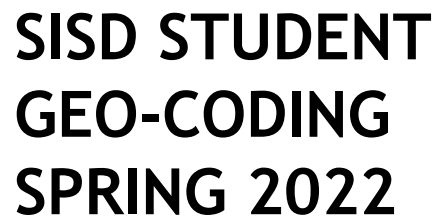
The total number of students living in the district but not enrolled in SISD increased by 217 students from 2015 to 2021



- TEA reports that in 2021/22, 467 students living in SISD were enrolled in another district and/or charter school
- From 2011-2015, the district averaged 235 Transfers-out per year
- Southwest Preparatory School opens in Fall 2016 with 93 students from Seguin ISD; total has grown to 210 students as of 2021/22

Source: Texas Education Agency Student Transfers Report

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



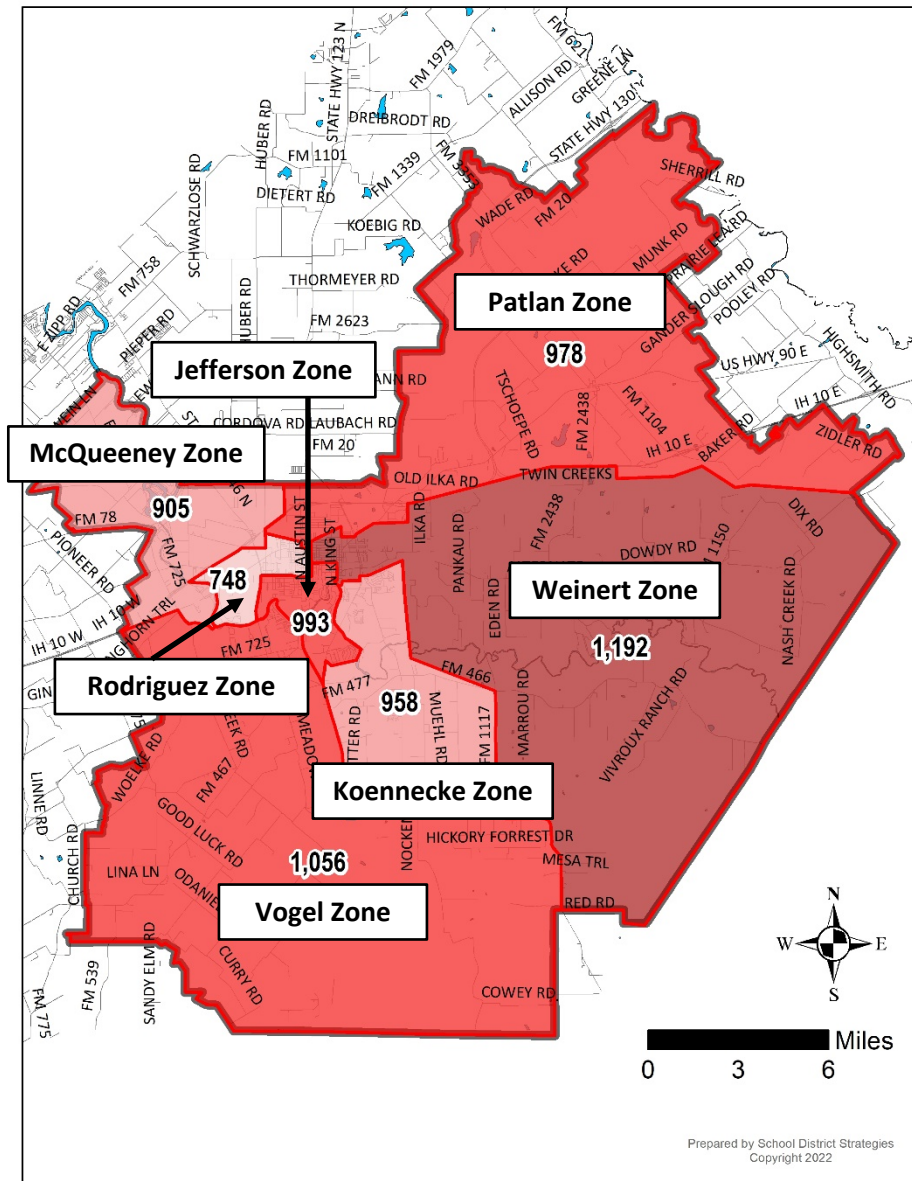


SISD STUDENT GEO-CODING: TOTAL STUDENTS RESIDING IN EACH ELEMENTARY ZONE

Geo-coding Results (All Grades PK-12)	2017	2019	2021	2022
Jefferson	1,210	1,136	1,068	993
Koennecke	749	858	893	958
McQueeney	1,009	970	916	905
Patlan	1,041	1,037	988	978
Rodriguez	945	865	783	748
Vogel	1,039	1,025	964	1,056
Weinert	1,270	1,247	1,188	1,192

**Totals reflect all enrolled students living in each attendance; totals do not reflect actual campus enrollment*

***Historical data reflects numbers using the Fall 2021 attendance zone boundaries*



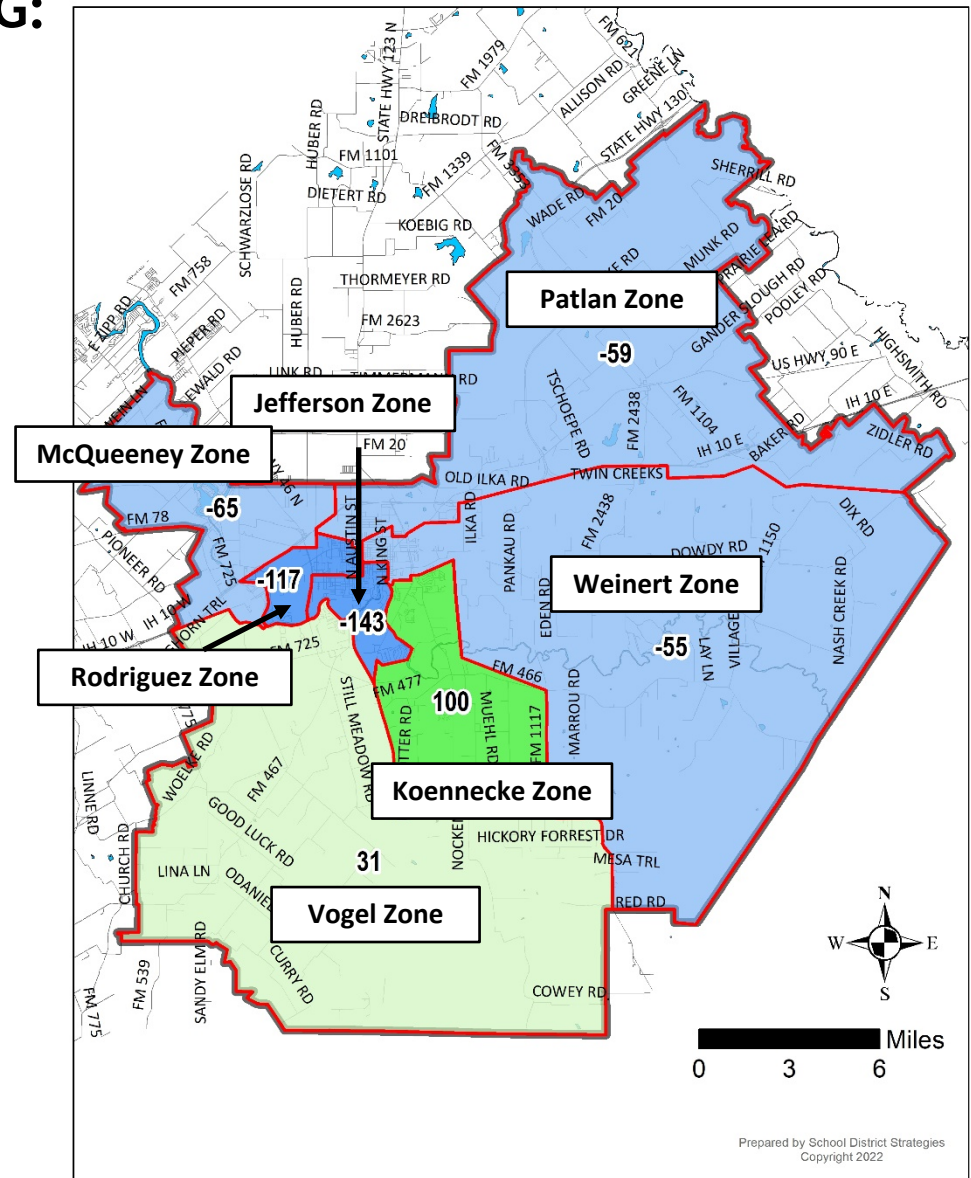


SISD STUDENT GEO-CODING: TOTAL STUDENTS BY ELEMENTARY ZONE (3-YR. CHANGE)

Geo-coding Results (All Grades PK-12)	2019	2022	3-Yr. Change
Jefferson	1,136	993	-143
Koenecke	858	958	+100
McQueeney	970	905	-65
Patlan	1,037	978	-59
Rodriguez	865	748	-117
Vogel	1,025	1,056	+31
Weinert	1,247	1,192	-55

**Totals reflect all enrolled students living in each attendance; totals do not reflect actual campus enrollment*

***Historical data reflects numbers using the Fall 2021 attendance zone boundaries*





**Totals reflect all enrolled students living in each attendance; totals do not reflect actual campus enrollment*



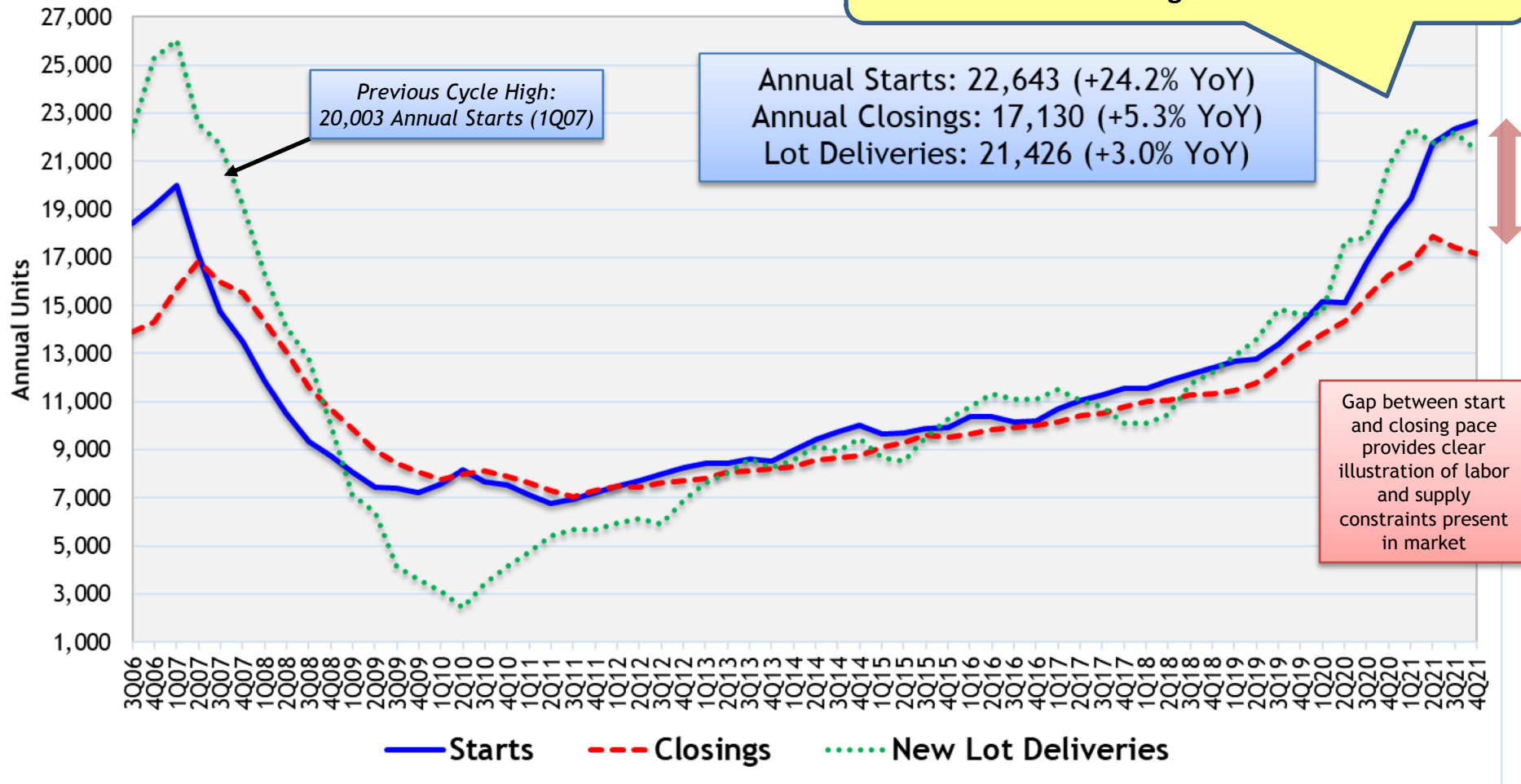
GROWTH DRIVERS: RECORD HOUSING DEMAND IN GREATER SAN ANTONIO CONTINUES

Combined Factors Produces Record Wave of New Construction in 2021

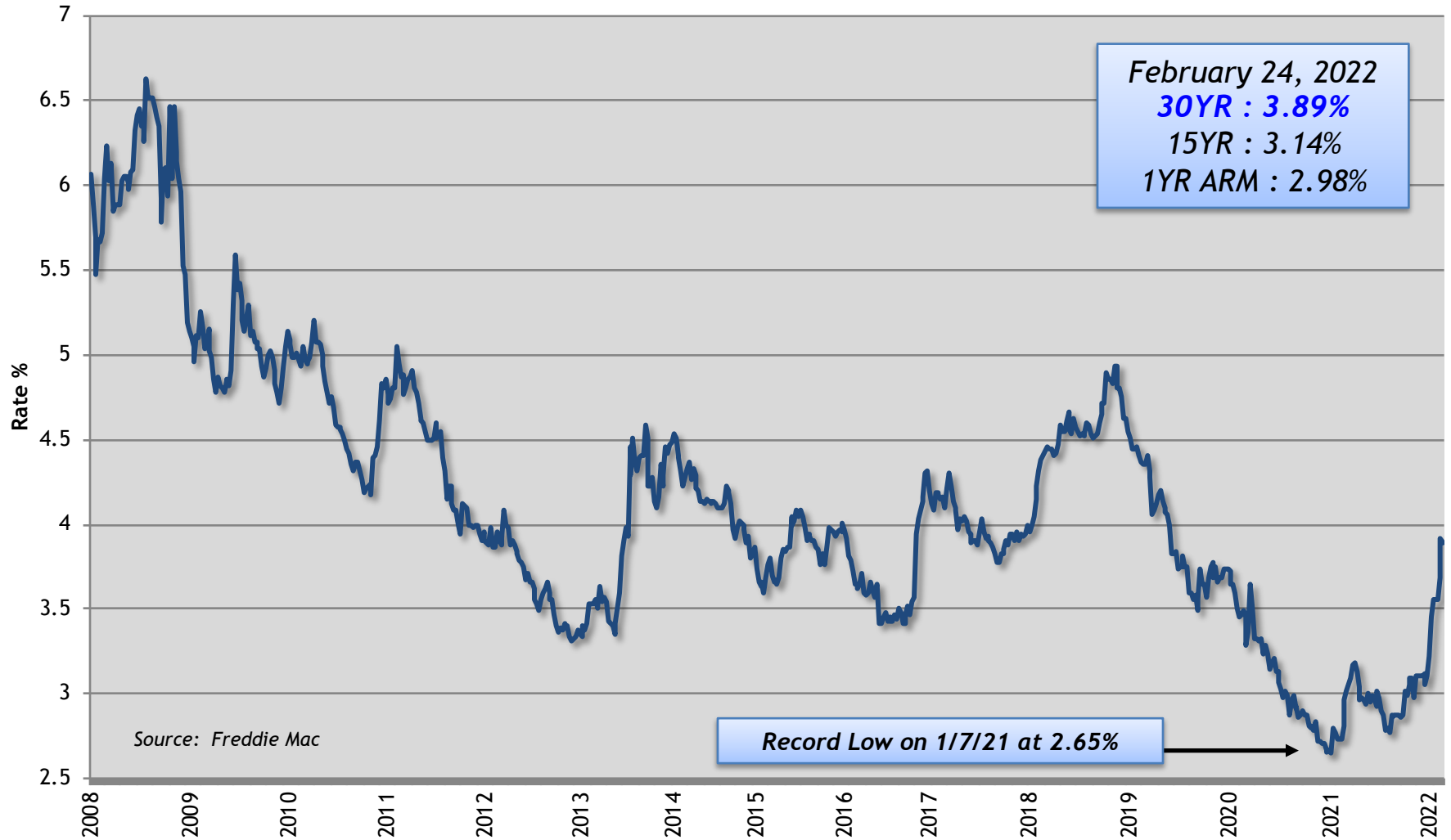
- Drop in mortgage rates to historic lows unlocks pent up demand from renters and move-up buyers
- Millennials age-up into home buying years and become First-time buyers
- Existing home market stripped of listing inventory forcing buyers to new home market
- Local job growth continues to recover, climbing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

SAN ANTONIO NEW HOME STARTS, CLOSINGS & LOT DELIVERIES

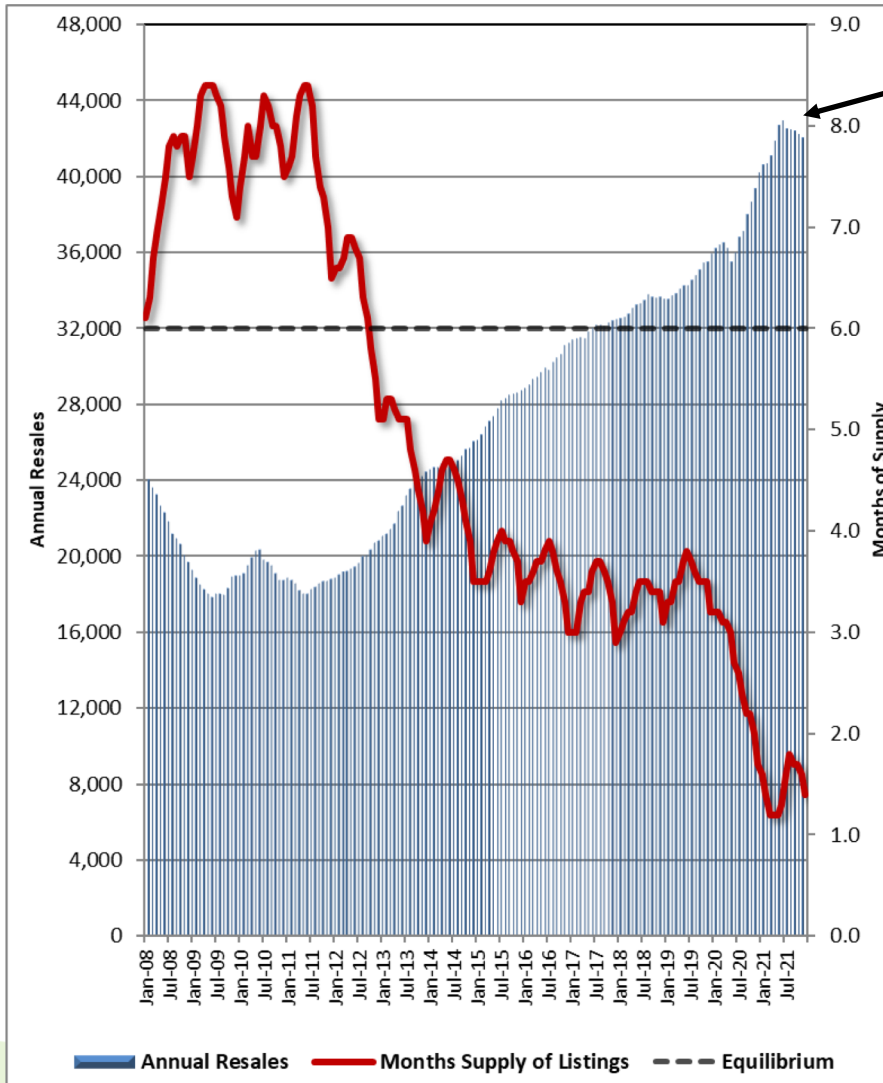
Greater San Antonio new home market grows to record levels during COVID-19 Pandemic



30-YEAR MORTGAGE RATE



SAN ANTONIO EXISTING HOME SALES

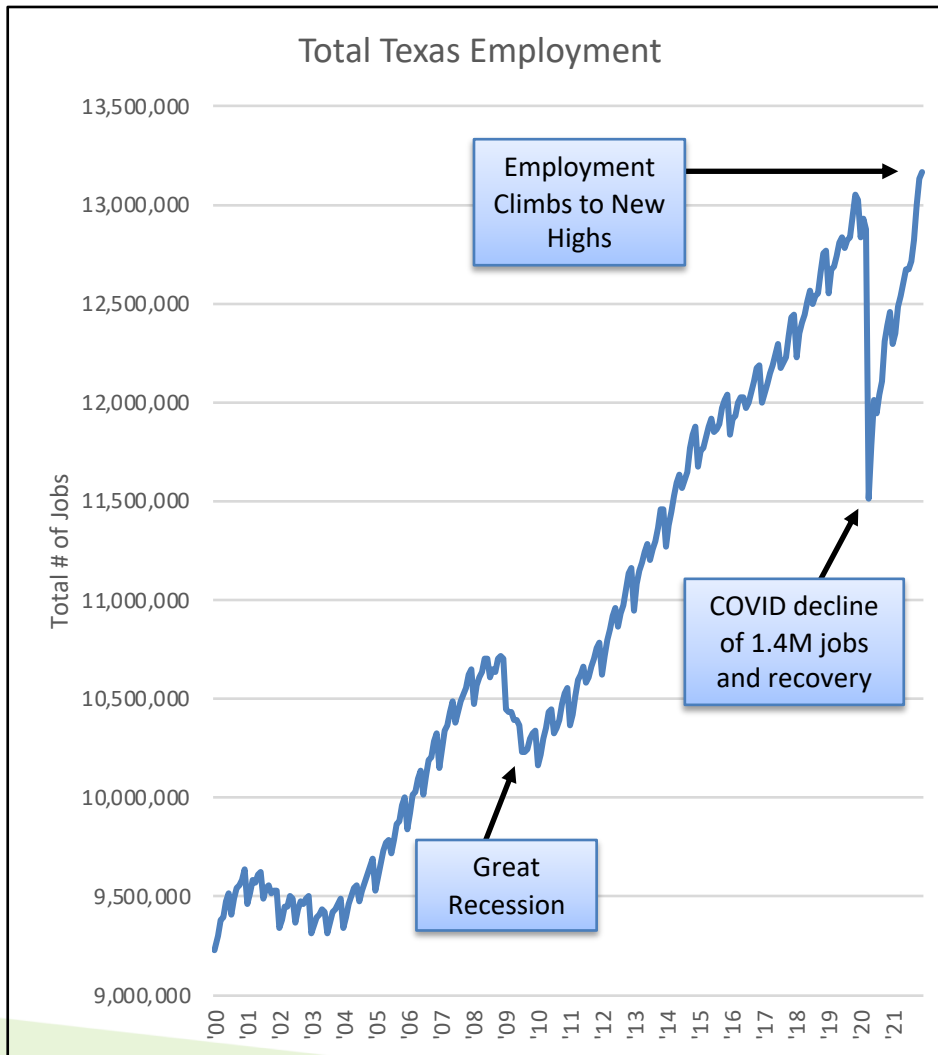


With inventory remaining near record lows, Existing Home Sales down slightly in 2021

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

TEXAS ECONOMY



Employment Recovering

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

United States

– -798,000 -0.53%

Texas

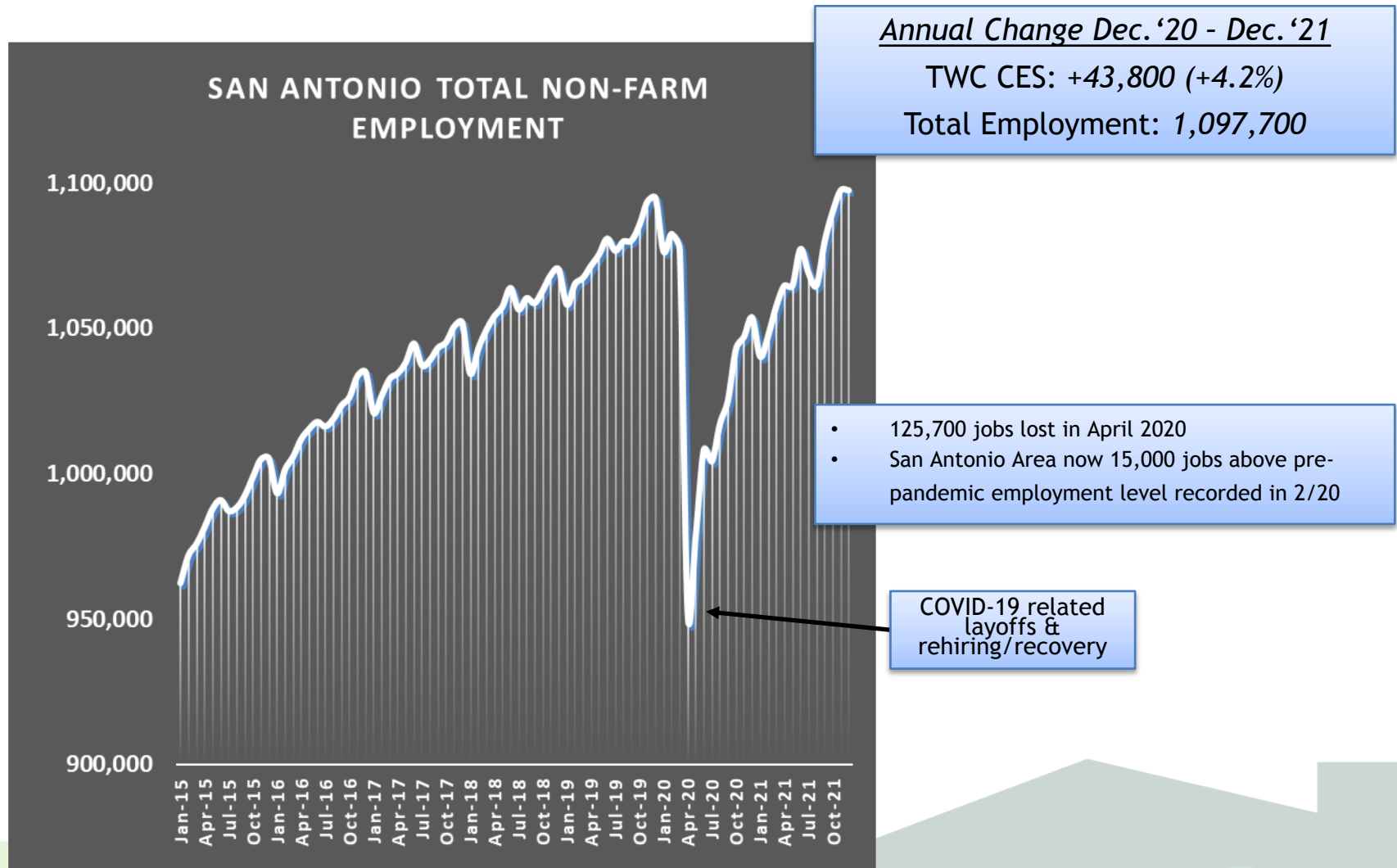
– +239,000 +1.85%

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%

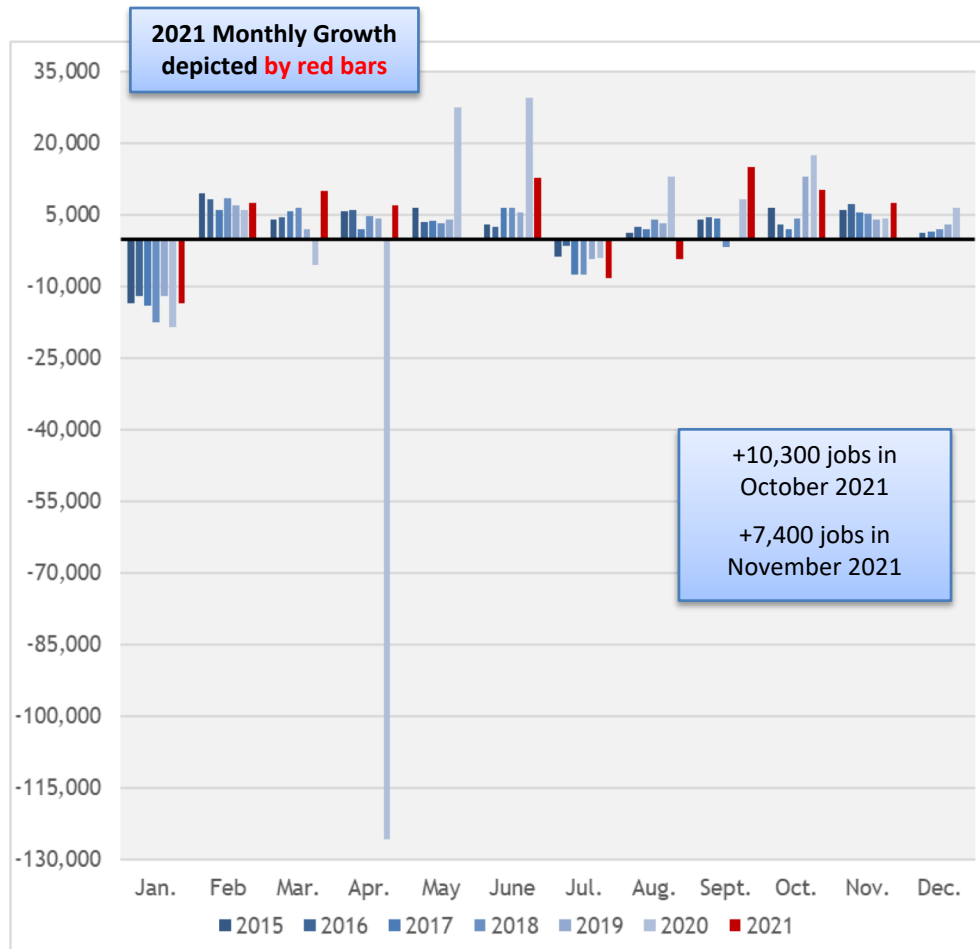
Source: TWC - CES (Not Seasonally Adjusted)

SAN ANTONIO EMPLOYMENT GROWTH



Sources: TWC - CES

SAN ANTONIO MONTHLY CHANGES IN EMPLOYMENT



December 2021	Annual Change	% Change
Mining, Log, Const	-100	-0.2
Manufacturing	+700	+1.4
Trade, Transp, Util	+5,800	+3.1
Information	+600	+3.3
Financial Activities	+3,300	+3.5
Prof & Bus Services	+8,000	+5.1
Edu. & Hlth Serv.	+1,700	+1.1
Leisure & Hospitality	+14,300	+12.5
Other Services	+1,800	+5.2
Government	+7,700	+4.4

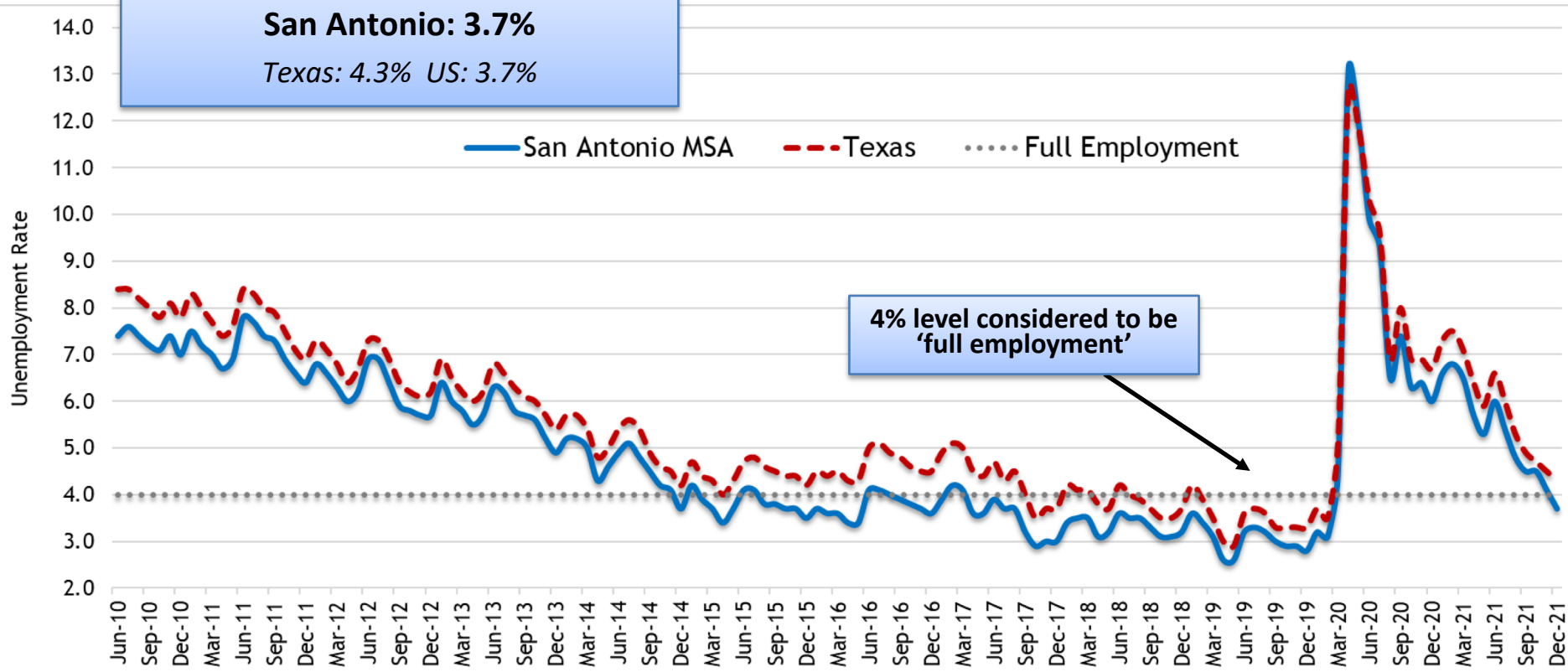
Source: TWC—CES Survey

SAN ANTONIO UNEMPLOYMENT TRENDS

Unemployment Rates (NSA) – Dec '21

San Antonio: 3.7%

Texas: 4.3% US: 3.7%

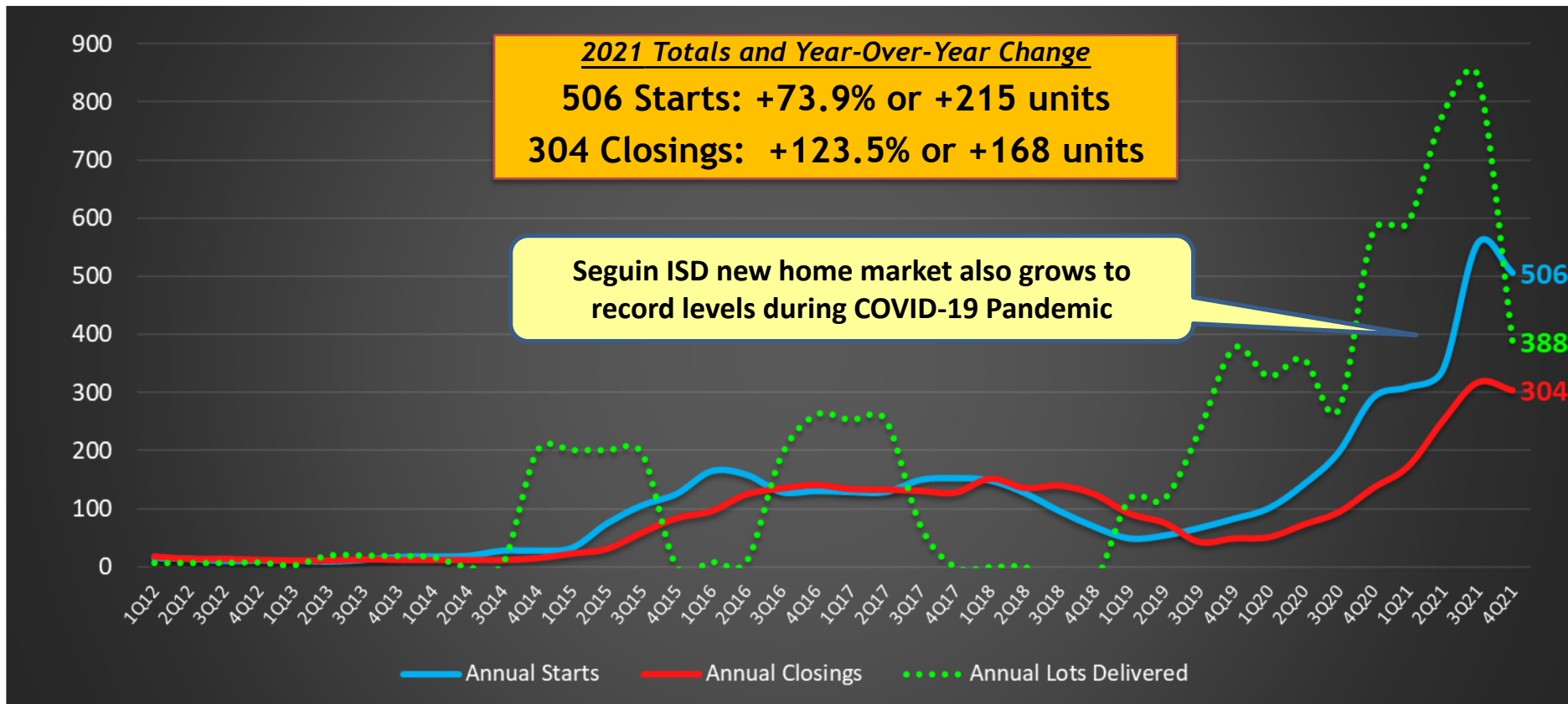




GROWTH DRIVERS: SEGUIN ISD

ANNUAL NEW HOME CONSTRUCTION ACTIVITY

Start = foundation started
Closing = visibly occupied home



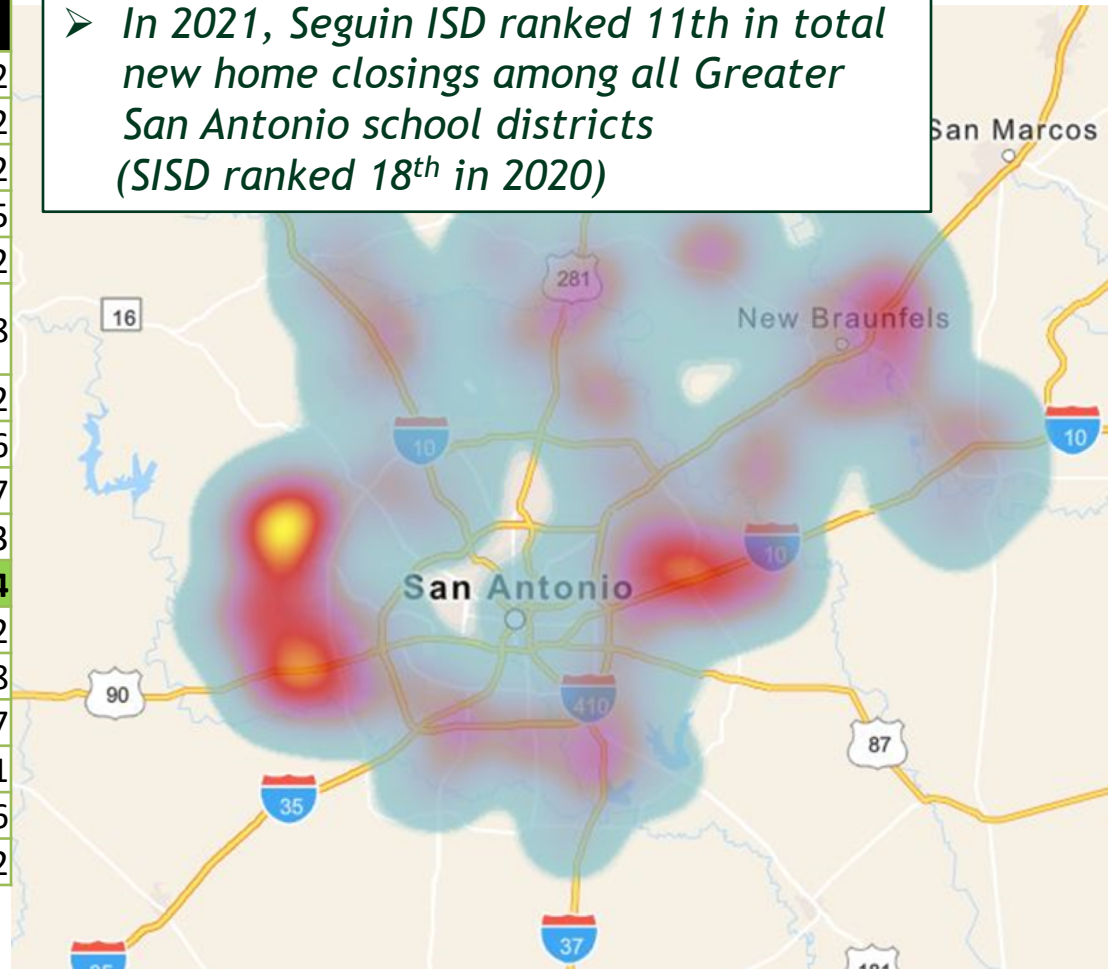
- New homebuilders started 506 new homes in the district during 2021 (+73.9% Y-o-Y)
- In 2021, 304 new homes were occupied in SISD (123.5% Y-o-Y)
- Developers have delivered 845 new lots over the past 15 months



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, Seguin ISD ranked 11th in total new home closings among all Greater San Antonio school districts (SISD ranked 18th in 2020)*



Start = Foundation started Closing = Occupied home



SISD TOP PRODUCING NEW HOME SUBDIVISIONS

(Ranked by Annual Closings 2021)

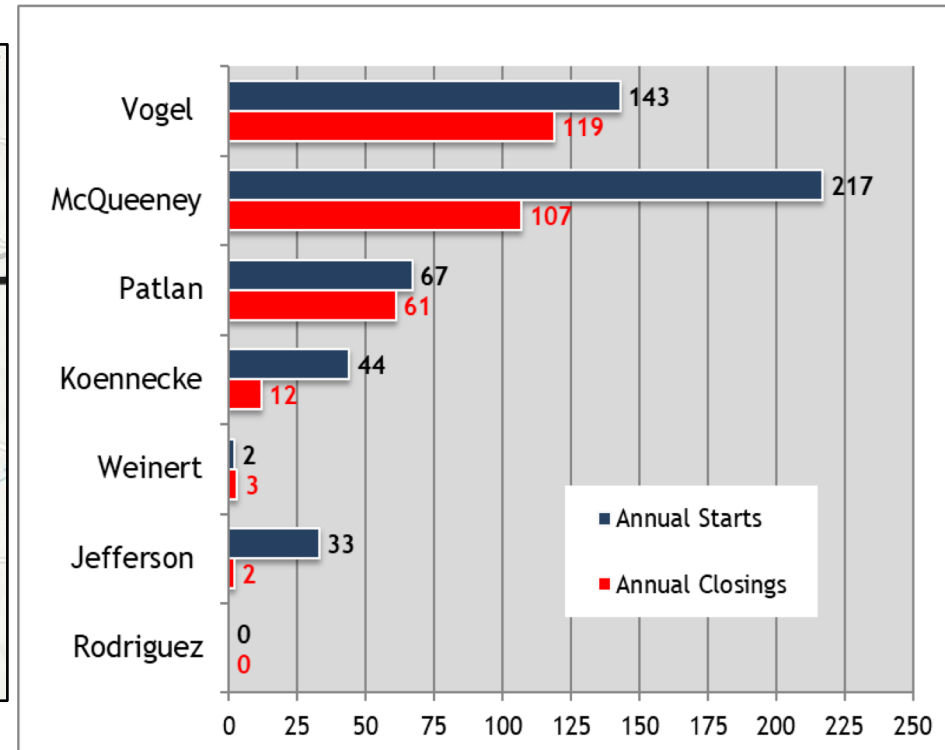
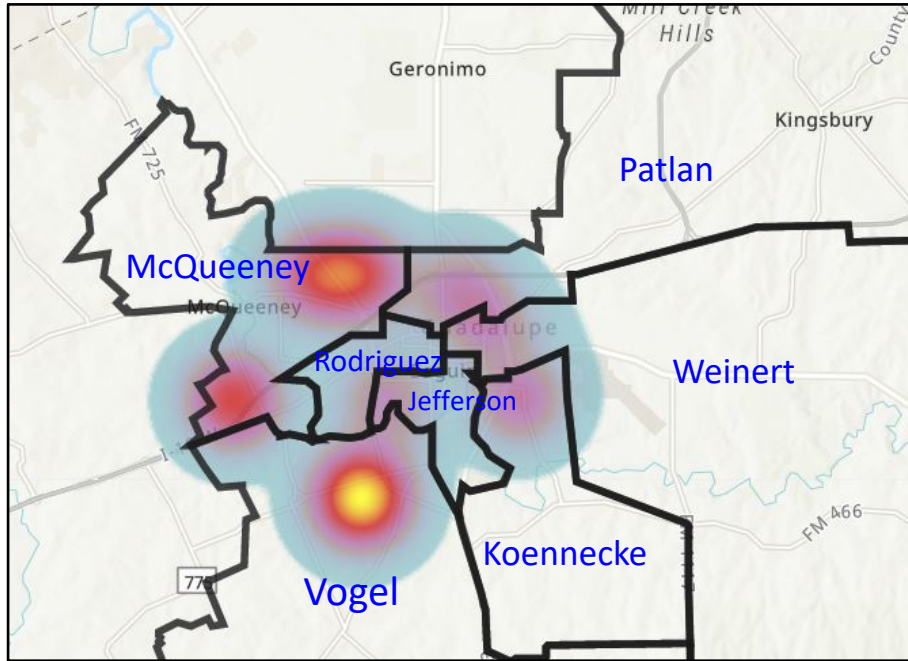


Rank	Subdivision	Annual Starts	Annual Closings	Occupied	Vacant Developed Lots	Future Lots	Elementary Zone
1	Arroyo Ranch	138	112	161	111	689	Vogel
2	Hiddenbrooke	70	71	137	88	236	McQueeney
3	Lucille/King St Duplexes	32	55	77	0	0	Patlan
4	Greenspoint Heights	64	23	23	61	214	McQueeney
5	Ridge View Estates	82	12	12	23	573	McQueeney
6	Greenfield	42	9	9	80	0	Koennecke
7	Chaparral Estates	2	7	7	22	0	Vogel
8	Martindale Heights	13	6	6	26	0	Patlan
<i>Up and Coming:</i>							
	Walnut Bend	31	0	0	29	40	Jefferson
	Meadows of Martindale	22	0	0	68	0	Patlan





SISD NEW HOME ACTIVITY BY ELEMENTARY ZONE

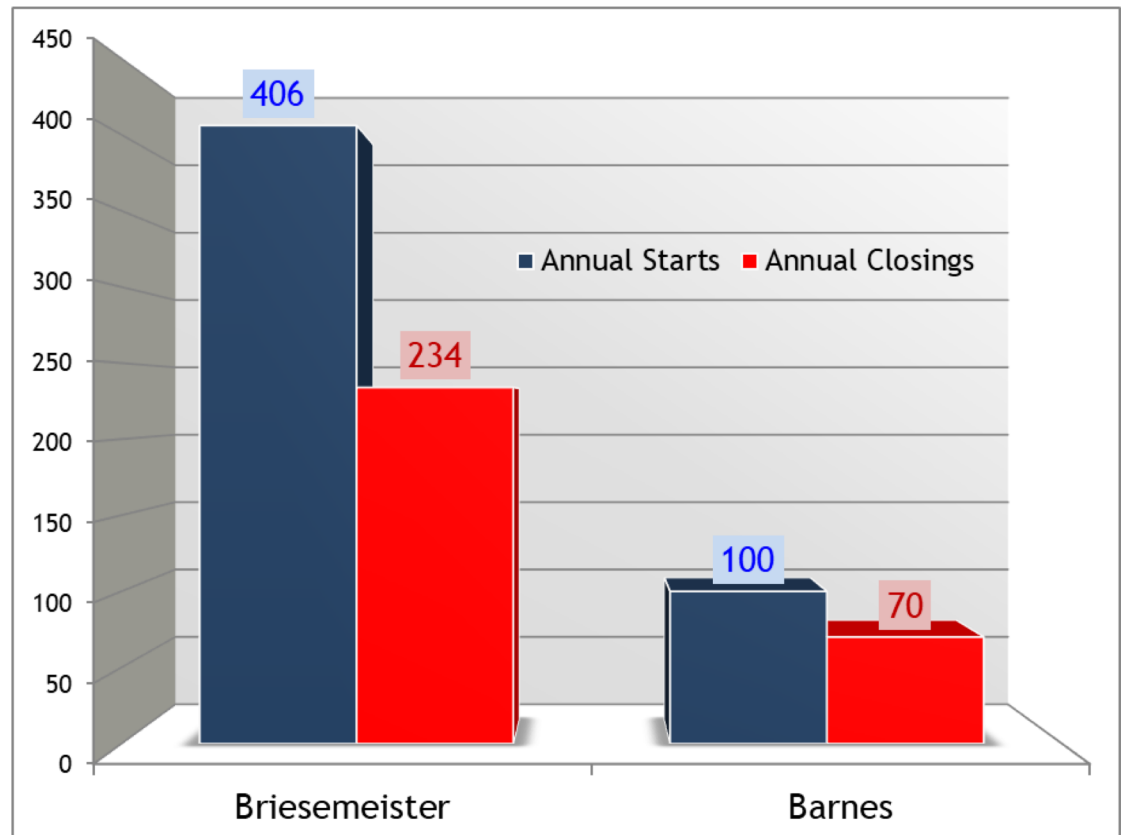


- 39% of the district's annual new home closings in 2021 occurred in the Vogel attendance zone
- Over 200 homes started in the McQueeney zone during 2021



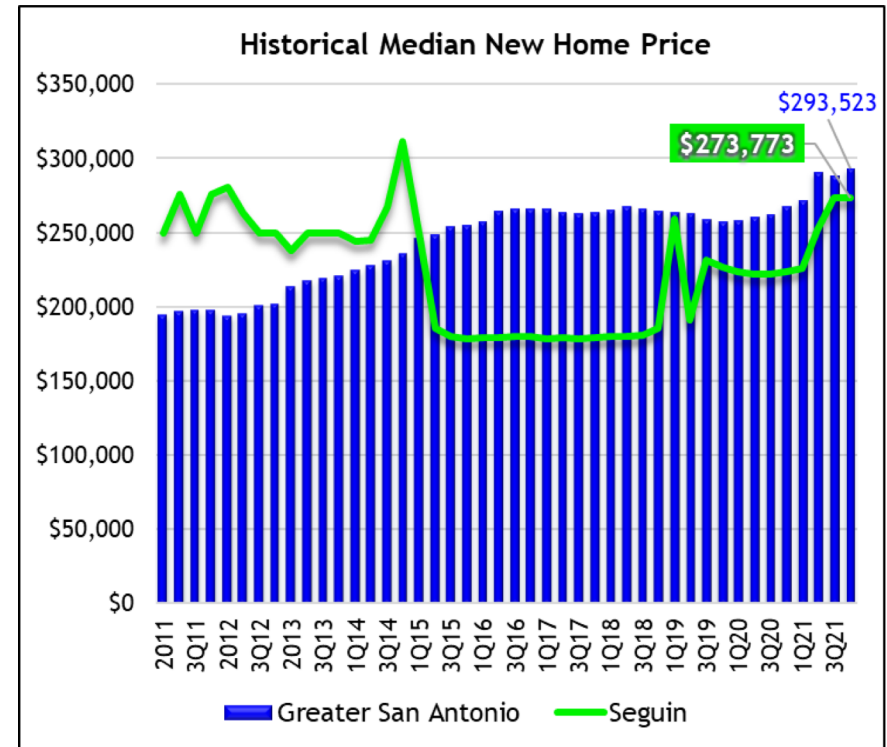
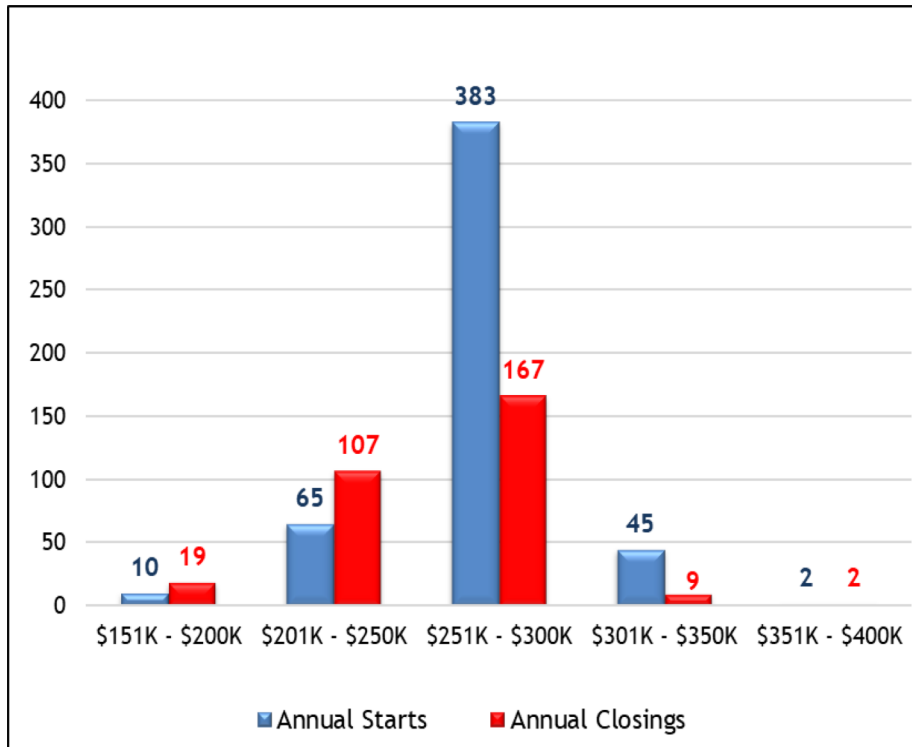
SISD NEW HOME ACTIVITY BY MIDDLE SCHOOL ZONE

- In 2021, over 400 new homes were started in the Briesemeister attendance zone
- 77% of the district's 2021 closings occurred in the Briesemeister zone





SISD NEW HOME ACTIVITY BY PRICE RANGE



- Many of the new homes being built in SISD today are smaller entry-level/value price point homes priced from \$200-300K
- The district's median new home price as of Y/E 2021 was \$273,773 (+2% YoY)
- Greater San Antonio's median new home price as of December 2021 was \$293,523

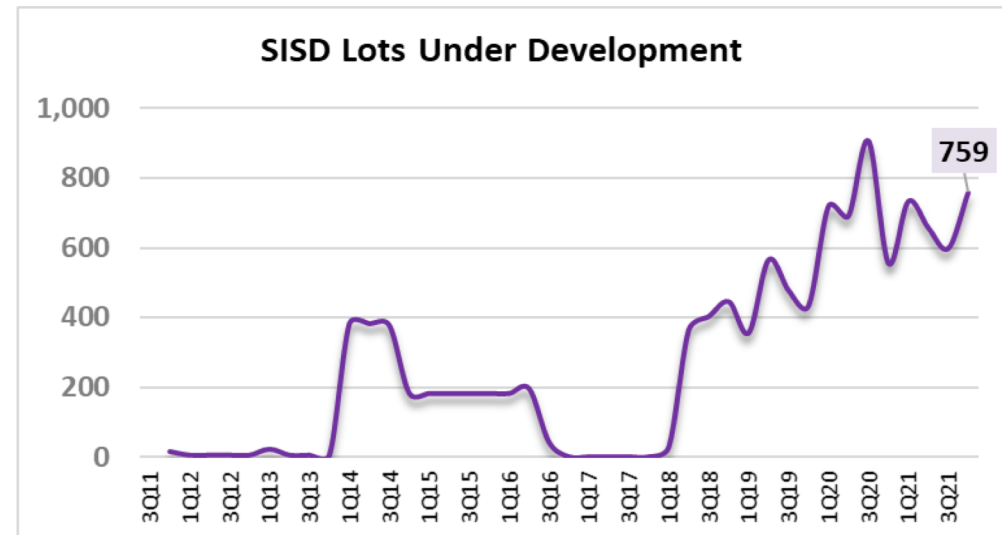
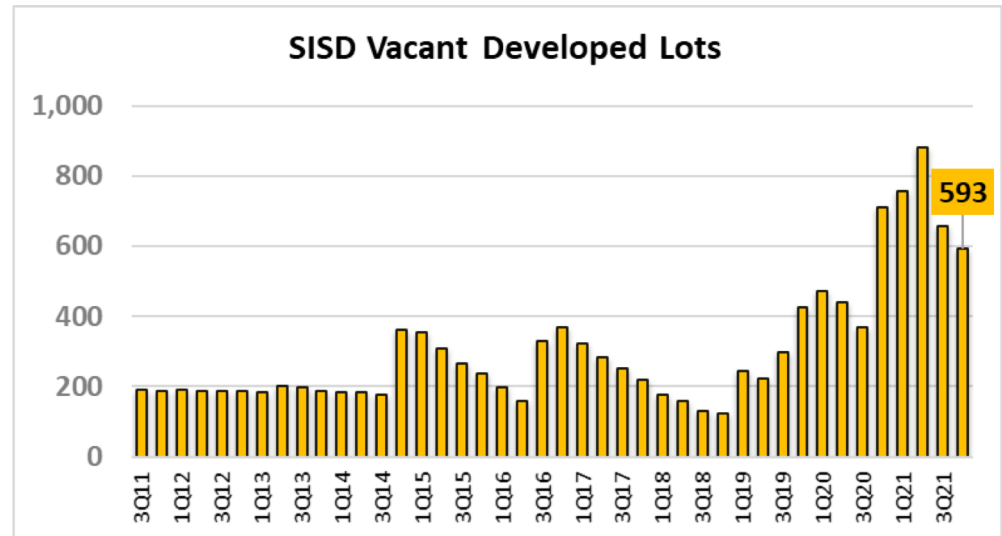


SEGUIN ISD NEW HOME LOT INVENTORY

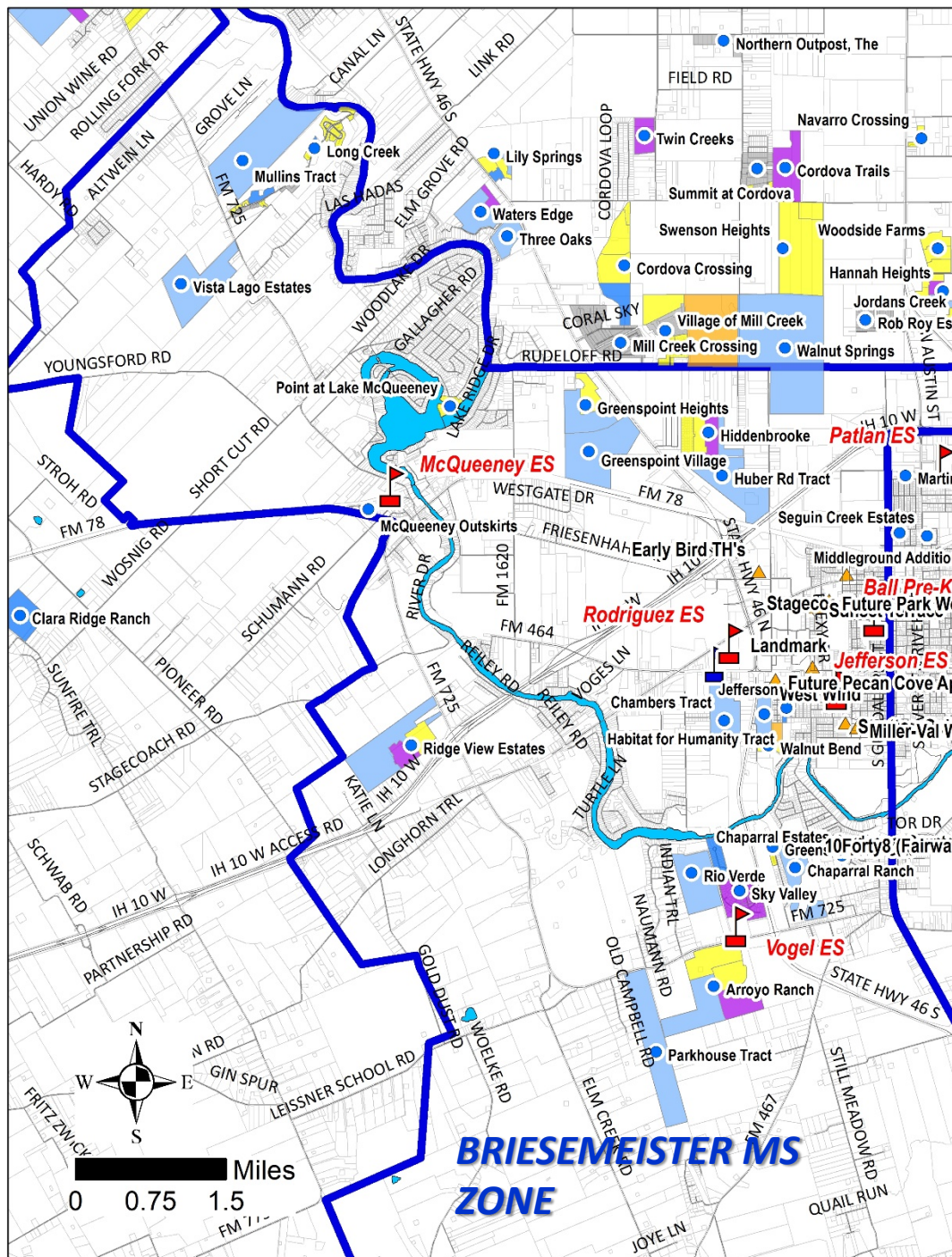
Single-Family Inventory at Y/E 2021

- 404 total homes in production (started but not occupied)
- 593 vacant developed lots (VDL)
- 759 future lots under development
- Over 6,500 future lots are planned (currently not under development)

VDL = Vacant developed lot; a lot that is fully developed with a paved street in front of it and ready for a house to be started



SEGUIN ISD NEW HOME MARKET- NORTHWEST



Active
 U/D - Streets/Utilities
 U/D - Grading/Staking
 Approved Plat (Not U/D)
 Preliminary (Not U/D)



Seguin ISD

Residential Development

Photos

January 2022



RIDGE VIEW ESTATES





RIDGE VIEW ESTATES





ARROYO RANCH



FM 725

Vogel ES



ARROYO RANCH





SKY VALLEY



Vogel ES

FM 725

SH 46



SKY VALLEY





WALNUT BEND





WALNUT BEND





HIDDENBROOKE

SH 46



GREENSPPOINT HEIGHTS



SH 46



MEADOWS OF MARTINDALE





GREENFIELD



Koennecke ES

Barnes MS



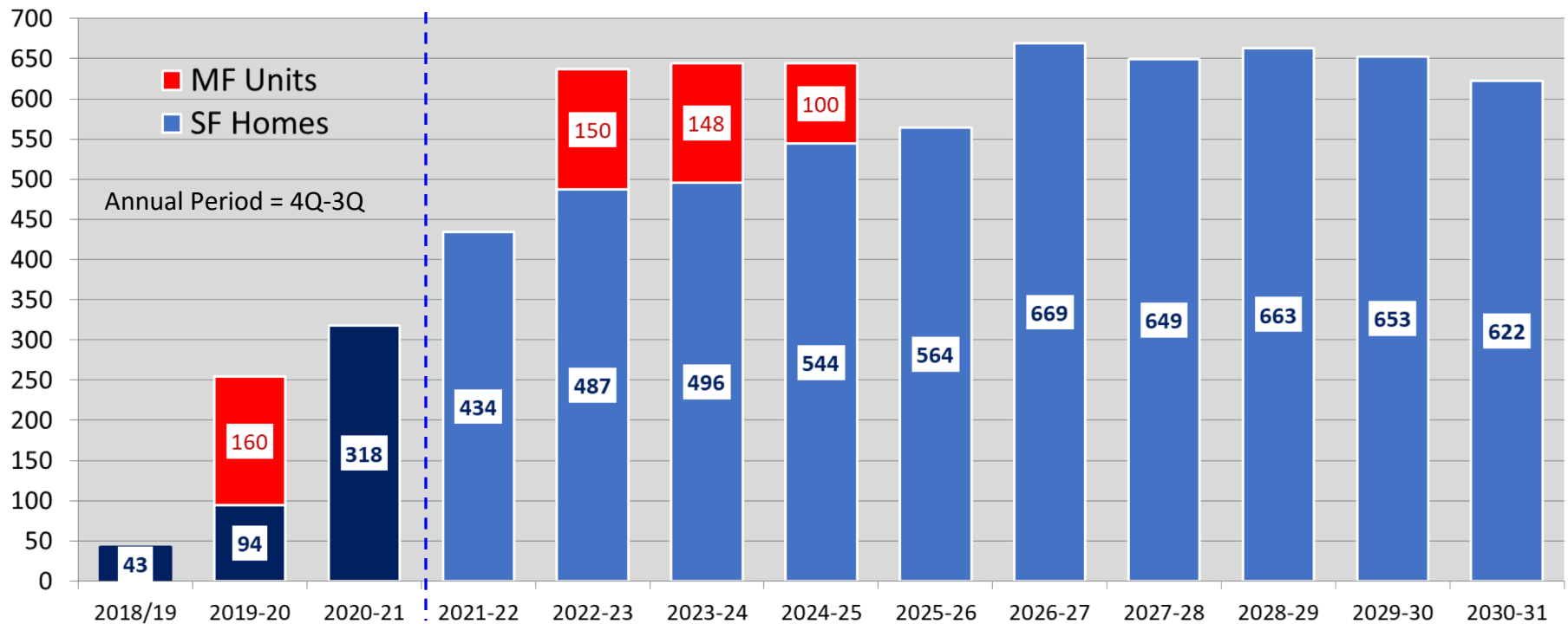
GREENFIELD





DISTRICT NEW HOME OCCUPANCY FORECAST

(Based on known projects as of Spring 2022)



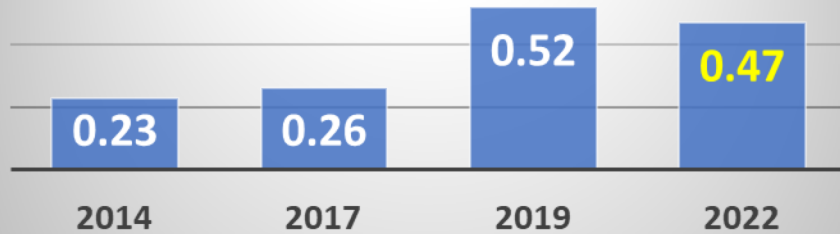
- Under the high growth scenario, SISD is projected to see annual new home closings climb to over 500 by 2024/25
- New home market has the potential to produce over 2,500 new occupancies by 2026
- Over the next 10 years, SISD could see over 5,700 new homes built and occupied
- Another 398 apartment units expected to be completed and leased out by 2025/26



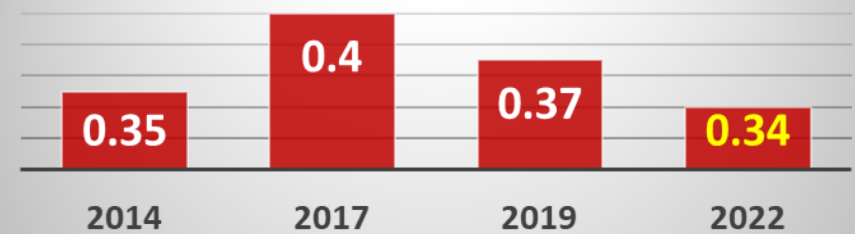
SISD STUDENT YIELDS ANALYSIS:



Single-Family Homes



Apartment Units



	Elementary (PK-5 th)	Middle (6 th -8 th)	High (9 th -12 th)
2022	0.20	0.11	0.15
2019	0.23	0.13	0.15

	Elementary (PK-5 th)	Middle (6 th -8 th)	High (9 th -12 th)
2022	0.20	0.06	0.08
2019	0.19	0.09	0.09

- As of Spring 2022, single-family (SF) detached homes in the district are yielding an average of 0.47 students per home (excluding Long Creek)

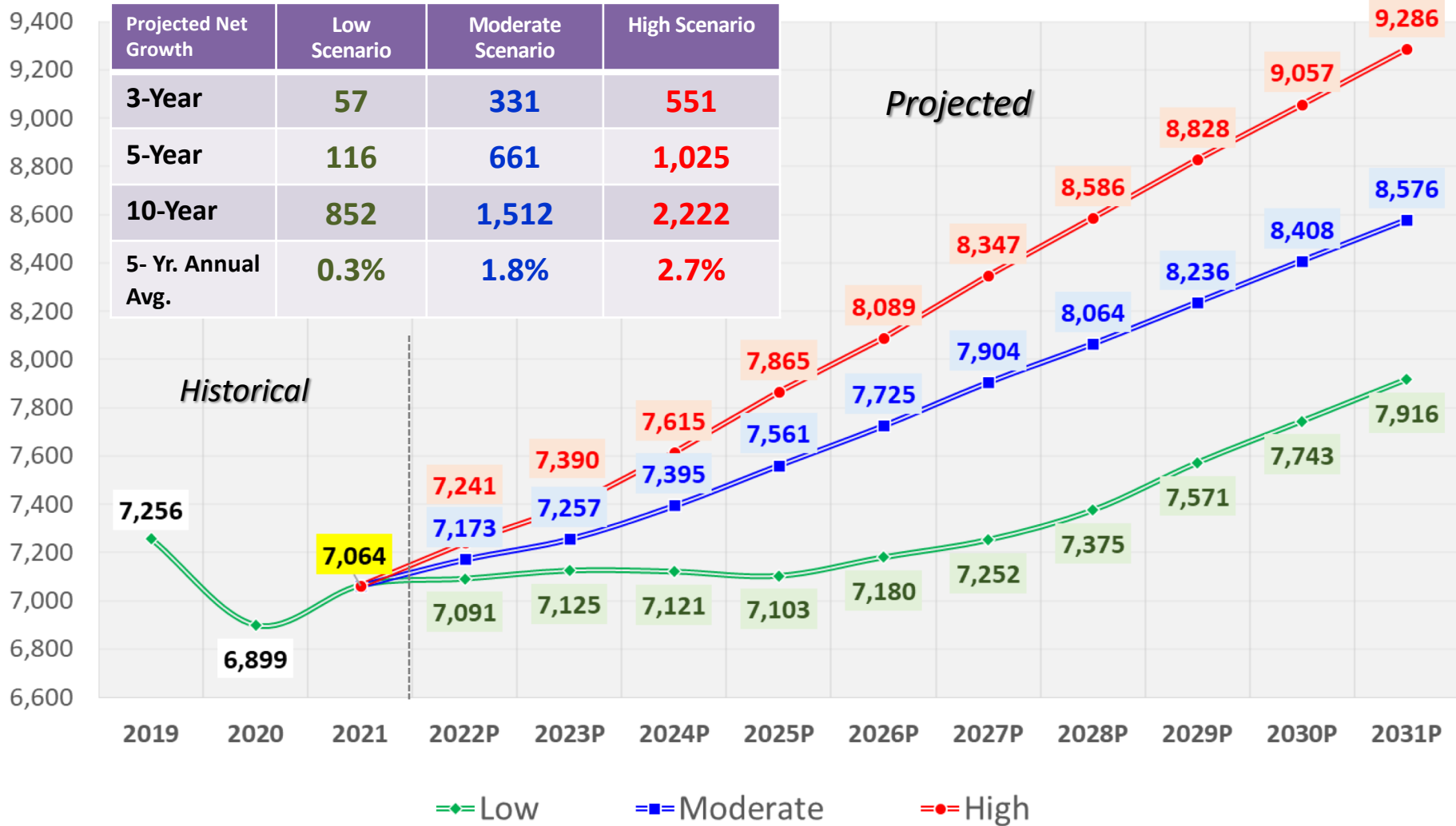
- District apartments are now yielding an average of 0.34 students per unit

Name	ELEM PK-5	MIDDLE 6-8	HIGH 9-12	Total Enrolled Students	Total Occupied Homes	ES Yield	MS Yield	HS Yield	Overall Student Yield
Arroyo Ranch	33	11	17	61	161	0.20	0.07	0.11	0.38
Greenspoint Heights	4	0	2	6	23	0.17	0.00	0.09	0.26
Hiddenbrooke	19	5	7	31	137	0.14	0.04	0.05	0.23
King St_Lucille St	8	5	8	21	77	0.10	0.06	0.10	0.27
The Meadows	115	76	101	292	378	0.30	0.20	0.27	0.77



DISTRICT ENROLLMENT PROJECTIONS (PK-12)

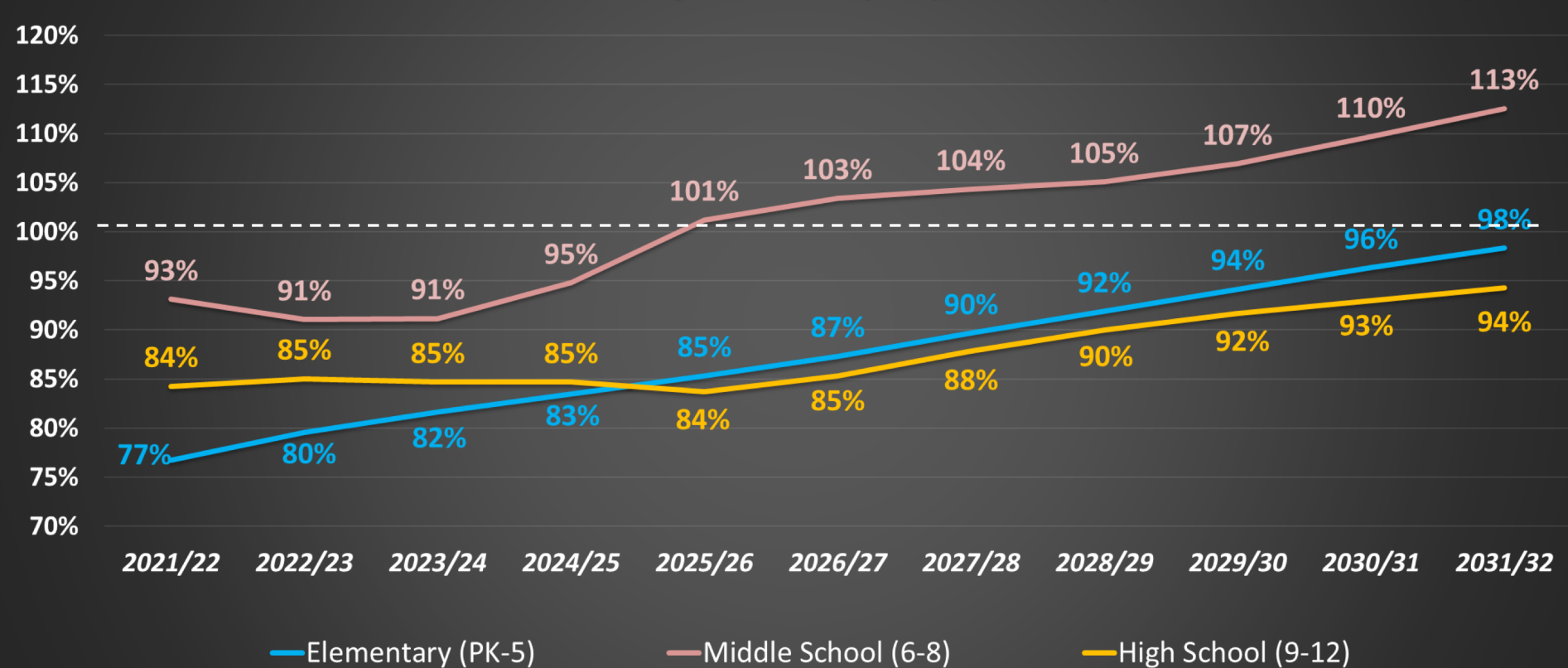
FALL 2022 - FALL 2031



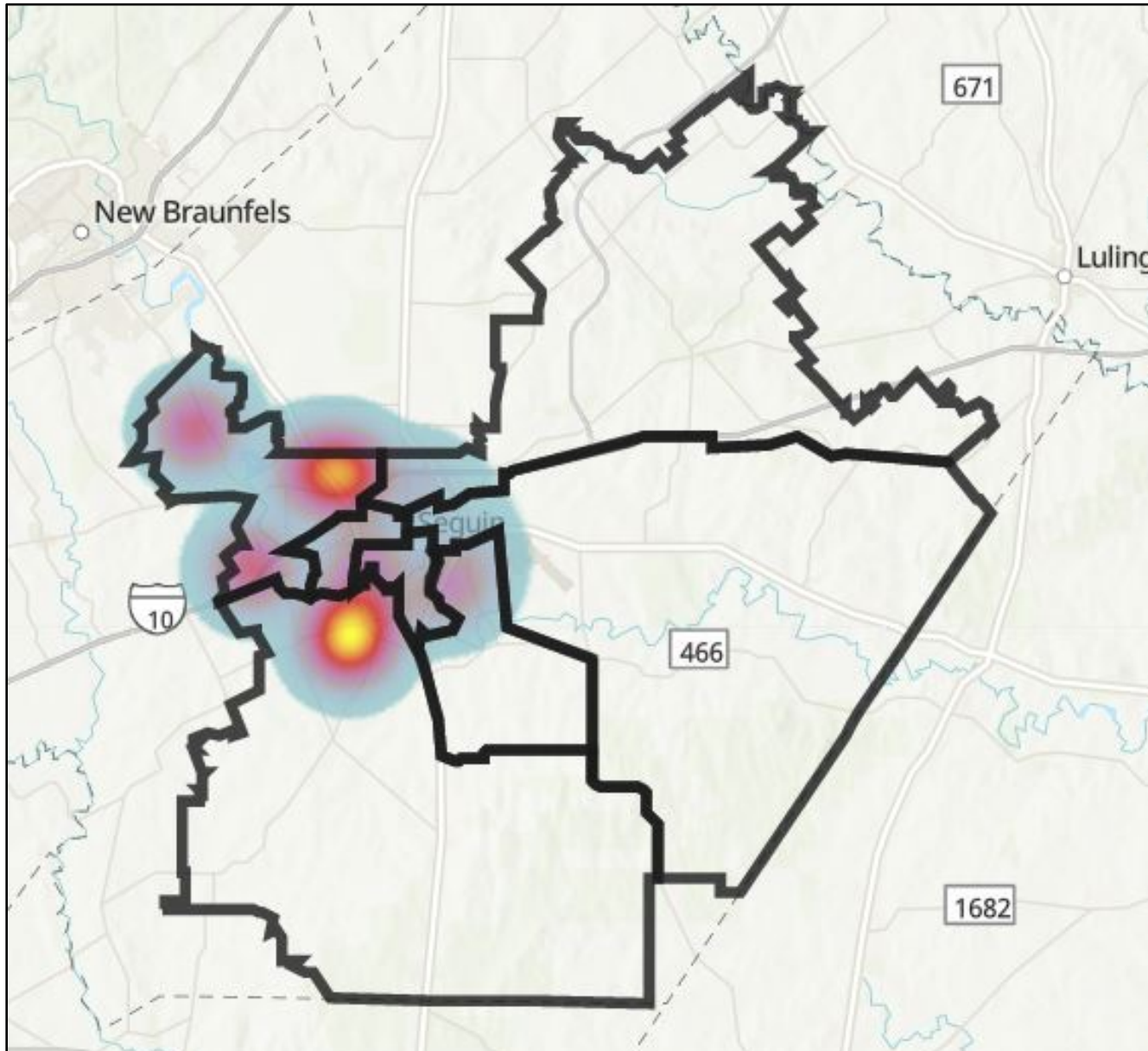


ATTENDANCE LEVEL CAPACITY UTILIZATION (MODERATE GROWTH)

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



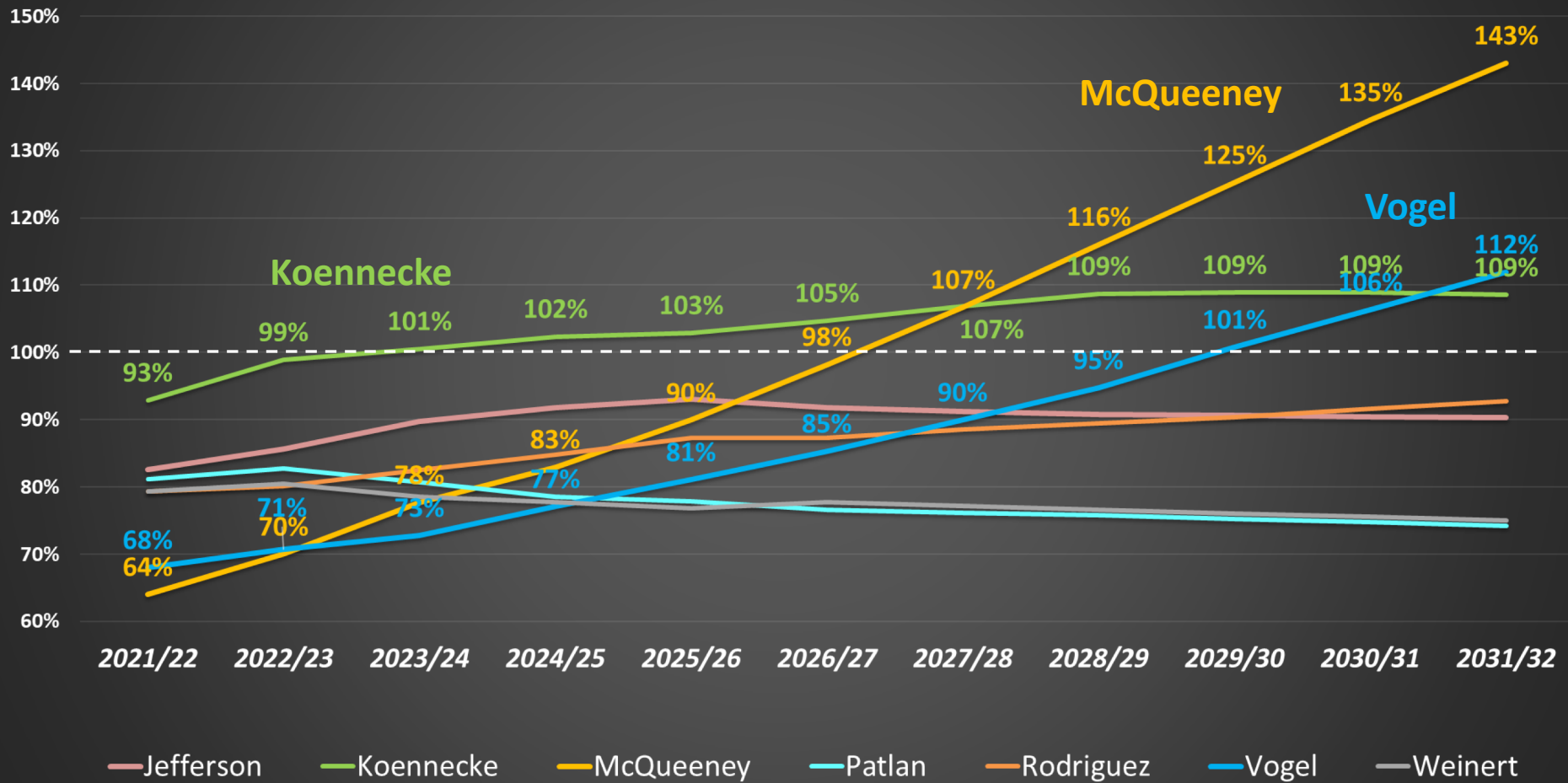
SEGUIN ISD PROJECTED STUDENT GROWTH FROM RESIDENTIAL CONSTRUCTION (2022-2031)





ELEMENTARY LEVEL CAPACITY UTILIZATION (MODERATE GROWTH)

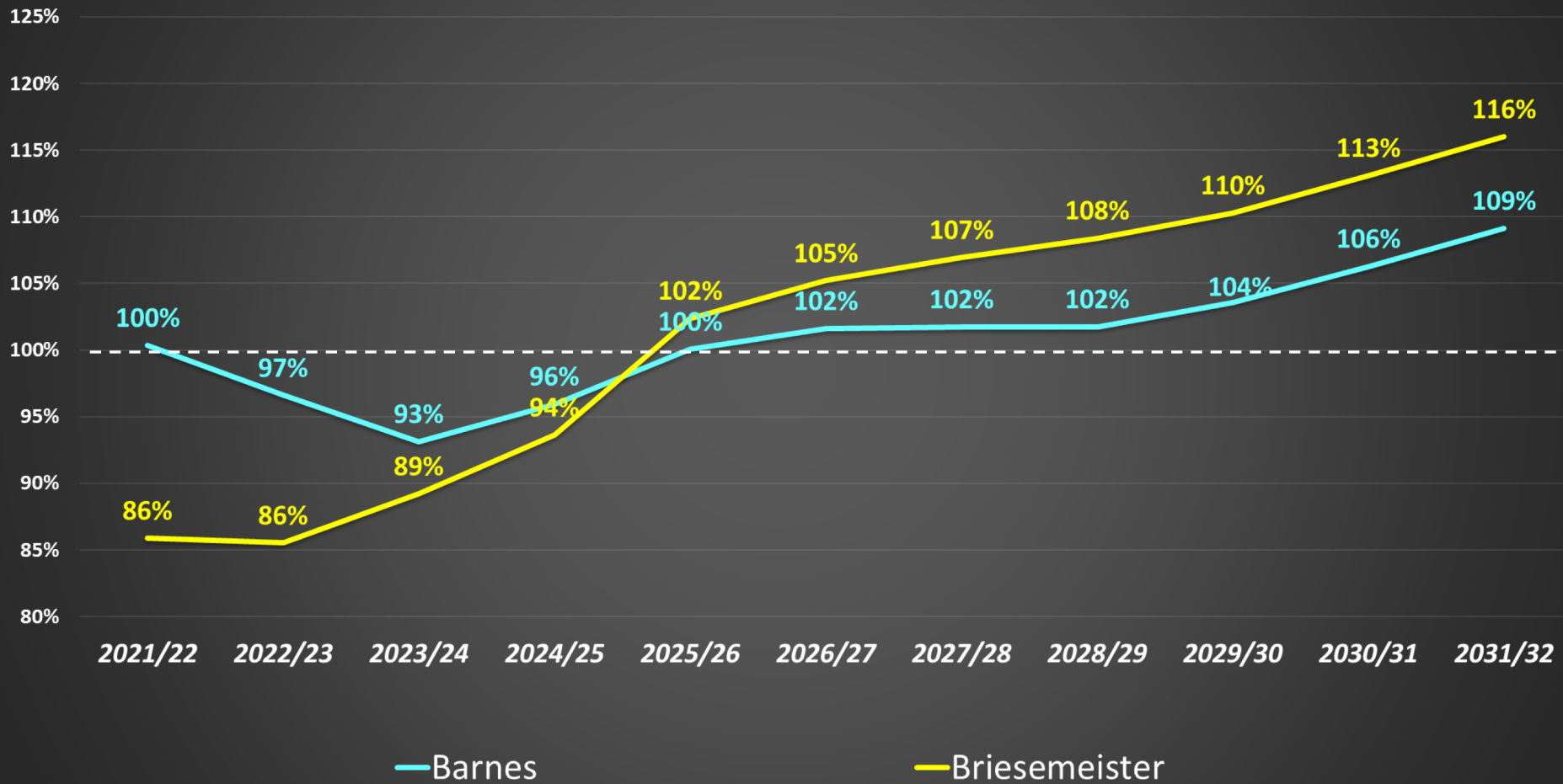
Elementary Campus Enrollment Projections vs. Functional Capacity Utilization
(Moderate Growth Scenario)





MIDDLE SCHOOL LEVEL CAPACITY UTILIZATION (MODERATE GROWTH)

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





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Suite 101
Dallas, Texas 75248

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