

*Demographics
and Planning
with School
Districts*

Eagle Mountain-
Saginaw Realtors
Association

May 2019



*Learn from Yesterday...
Understand Today...
Plan for Tomorrow*



Economic Conditions – DFW Area (March 2019)

3.1%

115,786 new jobs
National rate 1.0%



Job Growth

Unemployment Rate



U.S. 3.9%
Texas 3.5%
DFW MSA 3.3%
Tarrant Co 3.3%
Fort Worth 3.6%

-0.4%

34,523

1,007 more
starts than
1Q18



Annualized
Home Starts





National Economic Overview

Top Job Growth Markets Ranked by Change in Employment – 4Q18

Rank	MSA	Total Employment	Annual Job Growth	Annual Job Growth %
1	Houston-The Woodlands-Sugar Land, TX	3,158,800	117,800	3.9%
2	Dallas-Fort Worth-Arlington, TX	3,752,400	109,000	3.0%
3	New York-Newark-Jersey City, NY-NJ-PA	9,879,400	108,500	1.1%
4	Phoenix-Mesa-Scottsdale, AZ	2,143,800	76,700	3.7%
5	Seattle-Tacoma-Bellevue, WA	2,097,600	73,300	3.6%
6	Los Angeles-Long Beach-Anaheim, CA	6,193,900	72,400	1.2%
7	Miami-Fort Lauderdale-West Palm Beach, FL	2,700,000	64,000	2.4%
8	Atlanta-Sandy Springs-Roswell, GA	2,813,000	60,800	2.2%
9	Washington-Arlington-Alexandria, DC-VA-MD-WV	3,353,400	60,700	1.8%
10	Orlando-Kissimmee-Sanford, FL	1,312,100	55,400	4.4%
11	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	2,991,000	43,600	1.5%
12	San Francisco-Oakland-Hayward, CA	2,460,000	41,700	1.7%
13	Chicago-Naperville-Elgin, IL-IN-WI	4,795,900	41,300	0.9%
14	Austin-Round Rock, TX	1,082,500	40,400	3.9%
15	Denver-Aurora-Lakewood, CO	1,514,200	37,300	2.5%
16	Riverside-San Bernardino-Ontario, CA	1,511,600	37,200	2.5%
17	San Jose-Sunnyvale-Santa Clara, CA	1,147,200	35,300	3.2%
18	Las Vegas-Henderson-Paradise, NV	1,024,900	33,900	3.4%
19	Minneapolis-St. Paul-Bloomington, MN-WI	2,048,000	33,700	1.7%
20	Portland-Vancouver-Hillsboro, OR-WA	1,216,600	30,400	2.6%
21	Tampa-St. Petersburg-Clearwater, FL	1,360,100	29,100	2.2%
22	Charlotte-Concord-Gastonia, NC-SC	1,232,400	28,800	2.4%
23	Cleveland-Elyria, OH	1,093,300	26,900	2.5%
24	San Diego-Carlsbad, CA	1,492,100	26,000	1.8%
25	Baltimore-Columbia-Towson, MD	1,436,500	25,400	1.8%
56	San Antonio-New Braunfels, TX	1,059,000	9,200	0.9%

Source: Metrostudy-MetroUSA





DFW Corporate Relocations

Company	New HQ Location	Total Jobs	Total Square Ft.	Relocation or Expansion
JPMorgan Chase	Plano	4,800	1,000,000	Relocation
AmerisourceBergen Corp.	Carrollton	3,000	300,000	Expansion
Fannie Mae	Plano	2,000	330,000	Relocation
Kubota Tractor Corp.	Grapevine	1,000	136,000	Relocation
Atos	Irving	1,000	100,000	Expansion
McKesson Corp.	Irving	975	525,000	Relocation
Jacobs Engineering	Dallas	700	100,000	Relocation
Charles Schwab	Westlake	600	500,000	Expansion
Sabre	Westlake	400	196,048	Expansion
Sunoco LP	Dallas	400	121,000	Relocation
Maxim Integrated Inc.	Addison	350	193,725	Relocation
Thomson Reuters	Carrollton	250	240,000	Expansion
Creston Electronics	Plano	250	56,000	Relocation
Aprima Medical Software Inc.	Richardson	250	55,000	Relocation
Jamba Juice Co.	Frisco	125	25,000	Relocation
Main Event	Plano	100	30,000	Expansion
Coca-Cola North America	Plano	100	27,000	Relocation
Toyota Connected Inc.	Plano	100	20,000	Relocation



More than 16,400 new jobs are
relocating to DFW



National Housing Overview

Top Metrostudy CBSAs Ranked by Annual Starts – 4Q18

Rank	Market	Annual Starts	Annual Change	%
1	Dallas/Ft. Worth	34,750	1,428	4.3%
2	Houston	30,146	2,839	10.4%
3	Central Florida	28,074	4,440	18.8%
4	Atlanta	25,202	877	3.6%
5	Phoenix/Tucson	24,611	2,182	9.7%
6	Denver/Colorado Springs	21,057	1435	7.3%
7	Southern California	19,473	-390	-2.0%
8	Northern California	17,787	2,505	16.4%
9	Austin	16,424	366	2.3%
10	Salt Lake City	13,284	812	6.5%
11	Raleigh/Durham	12,461	330	2.7%
12	Charlotte	12,416	336	2.8%
13	San Antonio	11,748	666	6.0%
14	Tampa	11,632	1,033	9.7%
15	Central California	11,368	957	9.2%
16	Las Vegas	11,282	1,064	10.4%
17	Philadelphia Region	10,905	-1,181	-9.8%
18	Suburban Maryland	10,840	446	4.3%
19	Seattle	10,805	988	10.1%
20	Jacksonville	8,421	743	9.7%

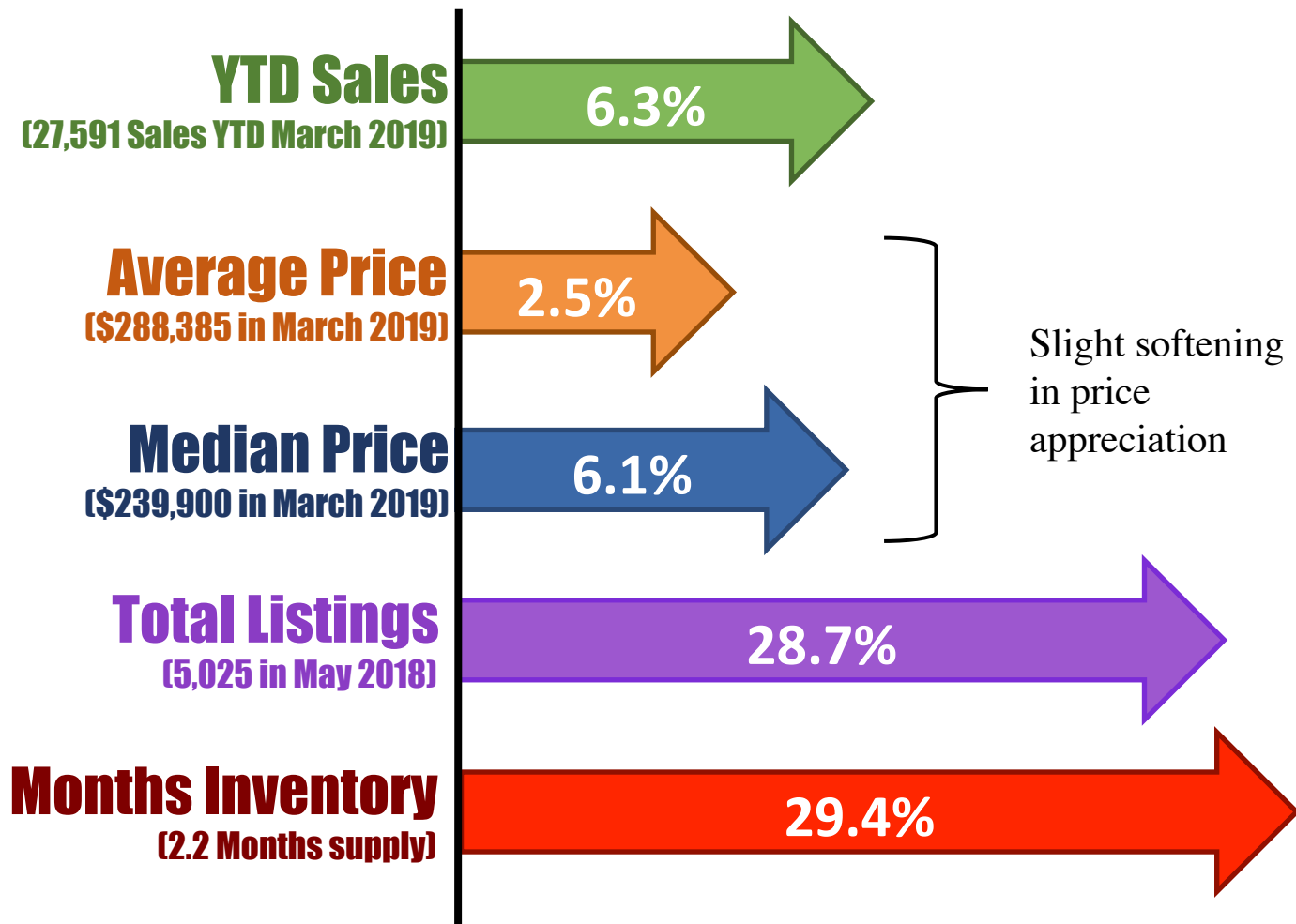
Source: Metrostudy-MetroUSA





Tarrant County Housing Market

Year-Over-Year Comparisons



Source: Texas A&M Real Estate Center



DFW New Home Ranking Report

ISD Ranked by Annual Closings – 1Q19

Rank	District Name	Annual Starts	Annual Closings	VDL	Future
1	Prosper ISD	2,753	2,667	4,655	21,922
2	Denton ISD	2,412	2,099	4,583	20,531
3	Frisco ISD	2,232	2,086	4,299	5,355
4	Northwest ISD	1,851	1,844	2,987	22,325
5	Dallas ISD	1,730	1,503	2,089	5,672
6	Little Elm ISD	1,344	1,365	1,238	2,435
7	Eagle Mt.-Saginaw ISD	1,572	1,336	1,975	19,038
8	Forney ISD	1,116	1,237	2,122	15,030
9	Lewisville ISD	1,328	1,160	1,992	3,478
10	Crowley ISD	921	926	1,390	13,826
11	Rockwall ISD	763	879	1,981	9,804
12	Wylie ISD	779	850	865	3,670
13	Mansfield ISD	893	803	1,326	7,349
14	McKinney ISD	800	728	2,022	8,362
15	Midlothian ISD	611	685	1,277	19,439
16	Princeton ISD	756	671	646	8,276
17	Royse City ISD	782	650	1,236	10,173
18	Aledo ISD	561	646	1,315	14,722
19	Waxahachie ISD	649	630	949	20,653
20	Allen ISD	733	616	1,087	1,072





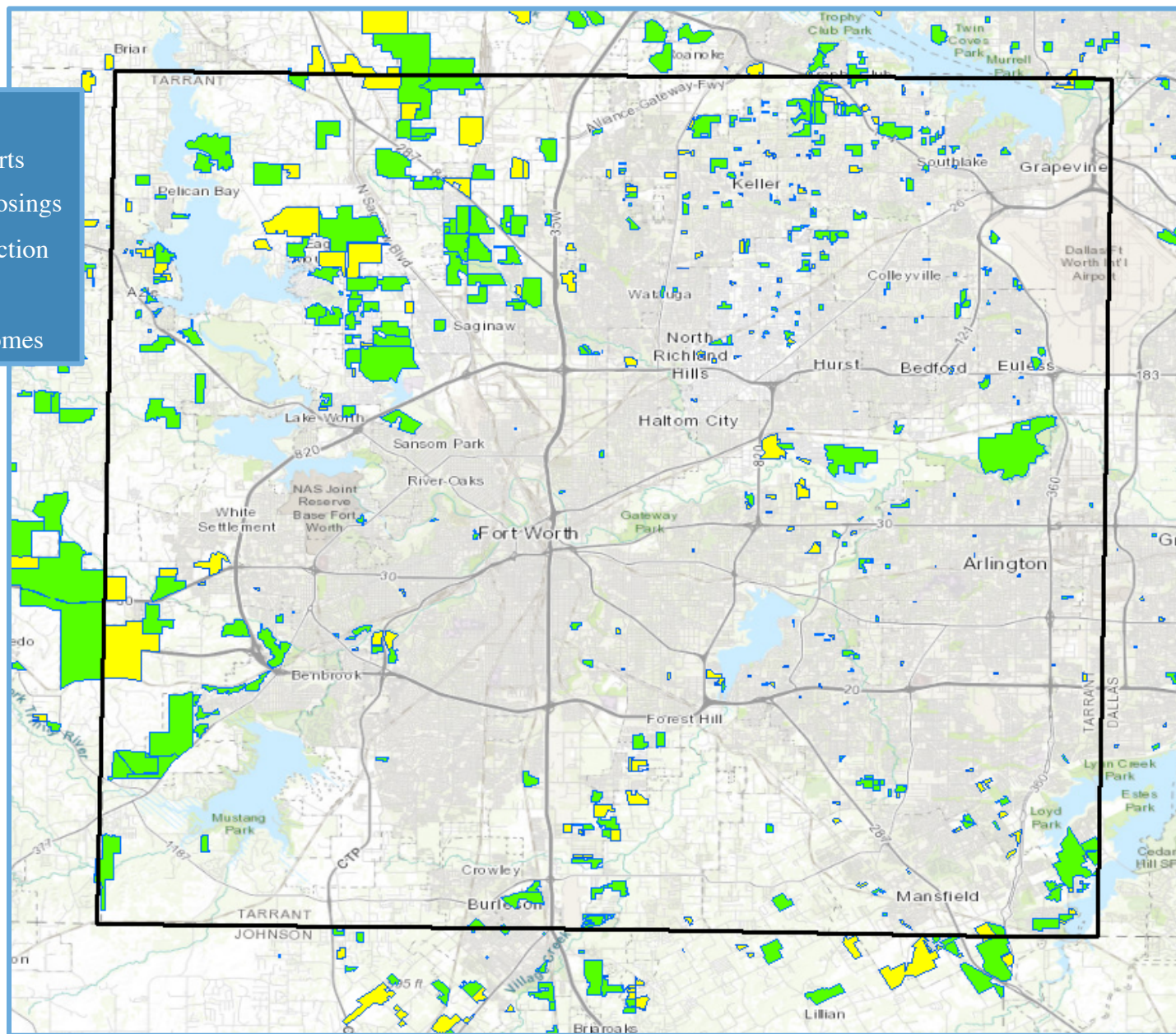
Northwest DFW Housing

Tarrant County represents:

- 7,075 annual new home starts
- 6,330 annual new home closings
- 2,650 homes under construction
- More than 11,000 VDL
- More than 70,200 future homes

Subdivisions

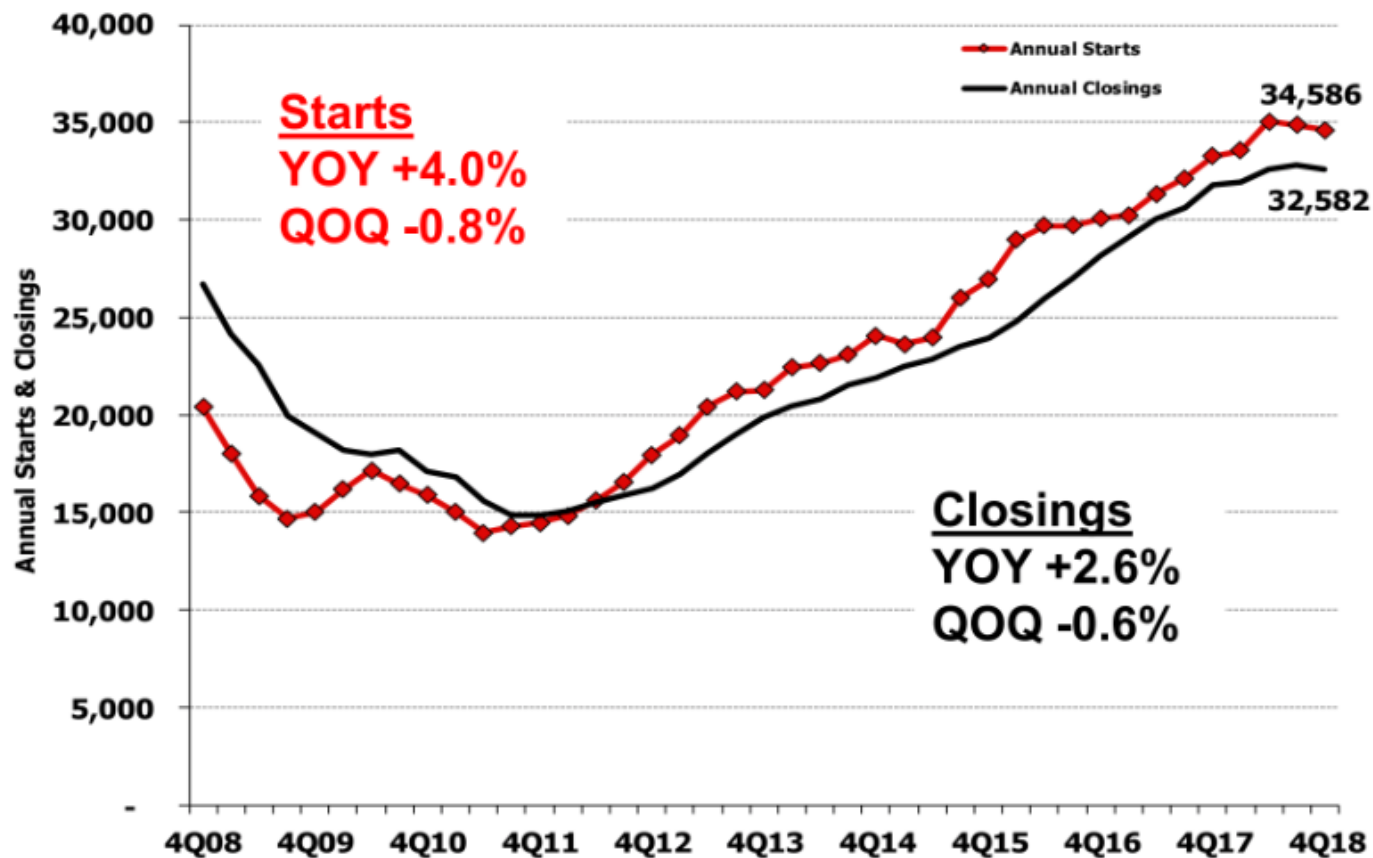
Active Future





DFW MSA Housing Market

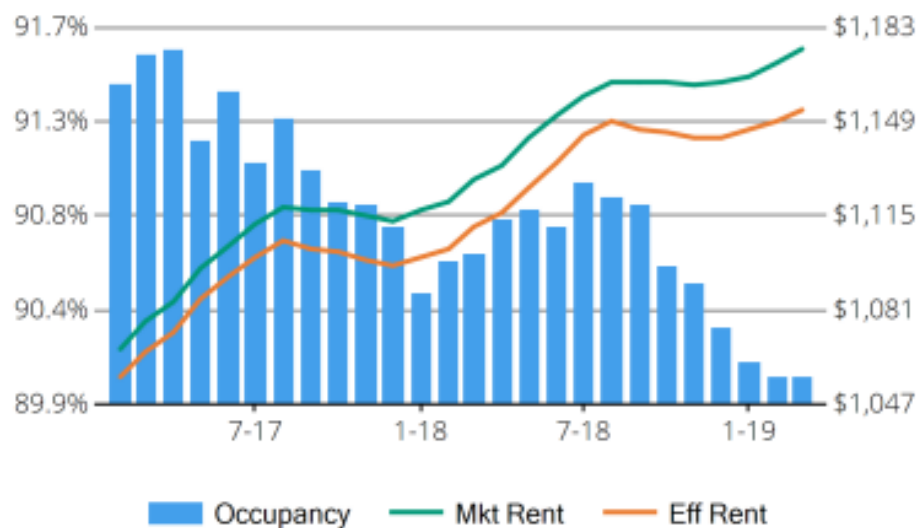
New Home Annual Starts and Closings





DFW MSA Multi-Family Housing Market

Dallas/Fort Worth, TX



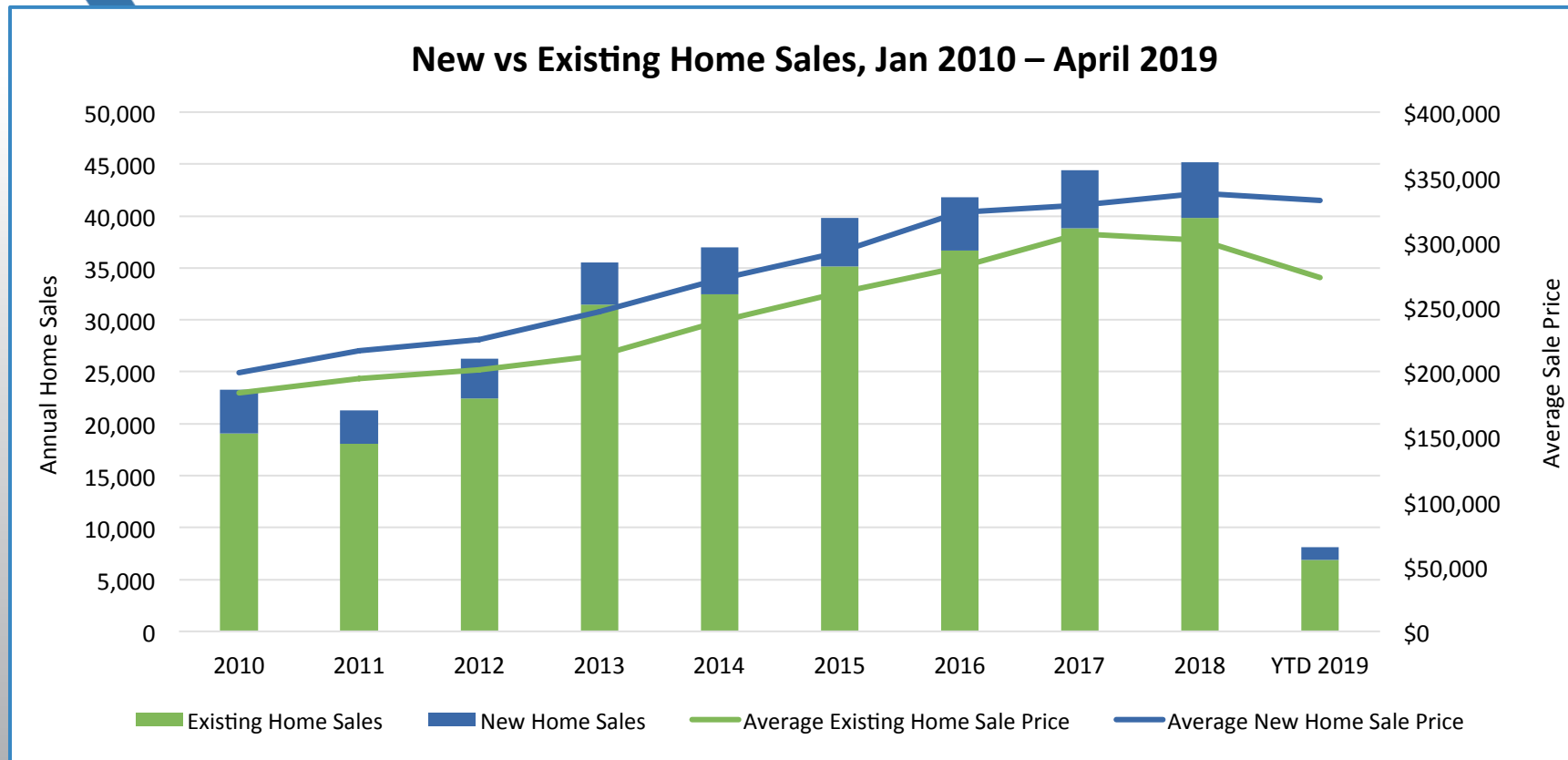
Conventional Properties	Mar 2019	Annual Change
Occupancy	90.0	-0.7%
Unit Change	28,598	
Units Absorbed (Annual)	21,344	
Average Size (SF)	865	0%
Asking Rent	\$1,175	+4.3%
Asking Rent per SF	\$1.36	+4.3%
Effective Rent	\$1,153	+3.9%
Effective Rent per SF	\$1.33	+3.9%
% Offering Concessions	24%	+17.8%
Avg. Concession Package	6.0%	+7.4%





Tarrant County Home Sales

Annual Home Sales vs Average Sale Price



- The average new home sale price for an existing home within Tarrant County has risen more than 66% since 2010, a rise of more than \$130,000
- The average existing home sale price has risen 48% or \$89,000 since 2010
- Annual new and existing home sales have risen steadily year over year since 2010
- In 2018, there were more than 45,000 total home sales within Tarrant County, with roughly 12% representing new homes



Top 20 Subdivisions in Tarrant County

Ranked by Annual Closings

Rank	Subdivision	Annual Starts	Annual Closings	VDL	Futures
1	Viridian	345	316	346	2,283
2	Hawthorne Meadows	272	300	49	169
3	Villages of Eagle Mountain	140	199	26	0
4	Llano Springs	164	190	229	583
5	Sendera Ranch	200	184	309	3,373
6	Glenwyck	116	152	0	0
7	Bar C Ranch	174	148	105	548
8	West Fork Ranch	84	135	0	9
9	Stone Creek Ranch	112	117	46	173
10	Harmon Ranch	51	108	3	0
11	Marine Creek Ranch	96	103	171	744
12	Berkshire	56	101	3	411
13	Trinity Oaks	210	101	9	0
14	Crescent Springs Ranch	164	96	186	0
15	Basswood Crossing	135	95	232	0
16	Twin Mills	129	92	75	220
17	Willow Ridge Estates	101	86	224	102
18	Parkview Estates	11	76	0	648
19	La Jolla	74	75	39	106
20	Live Oak Creek	94	71	146	310



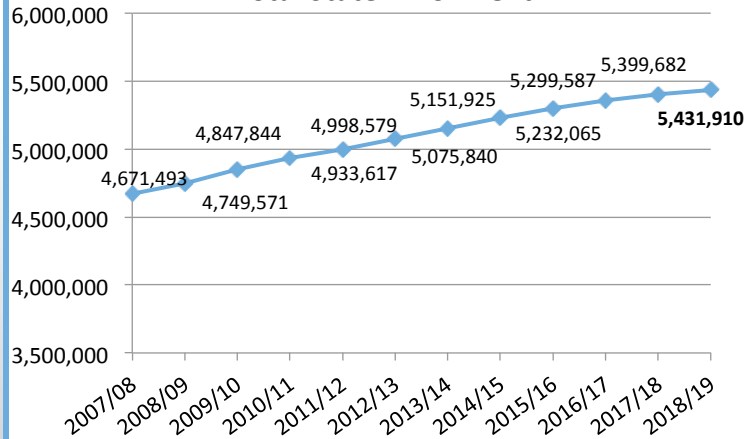


Texas Enrollment Trends

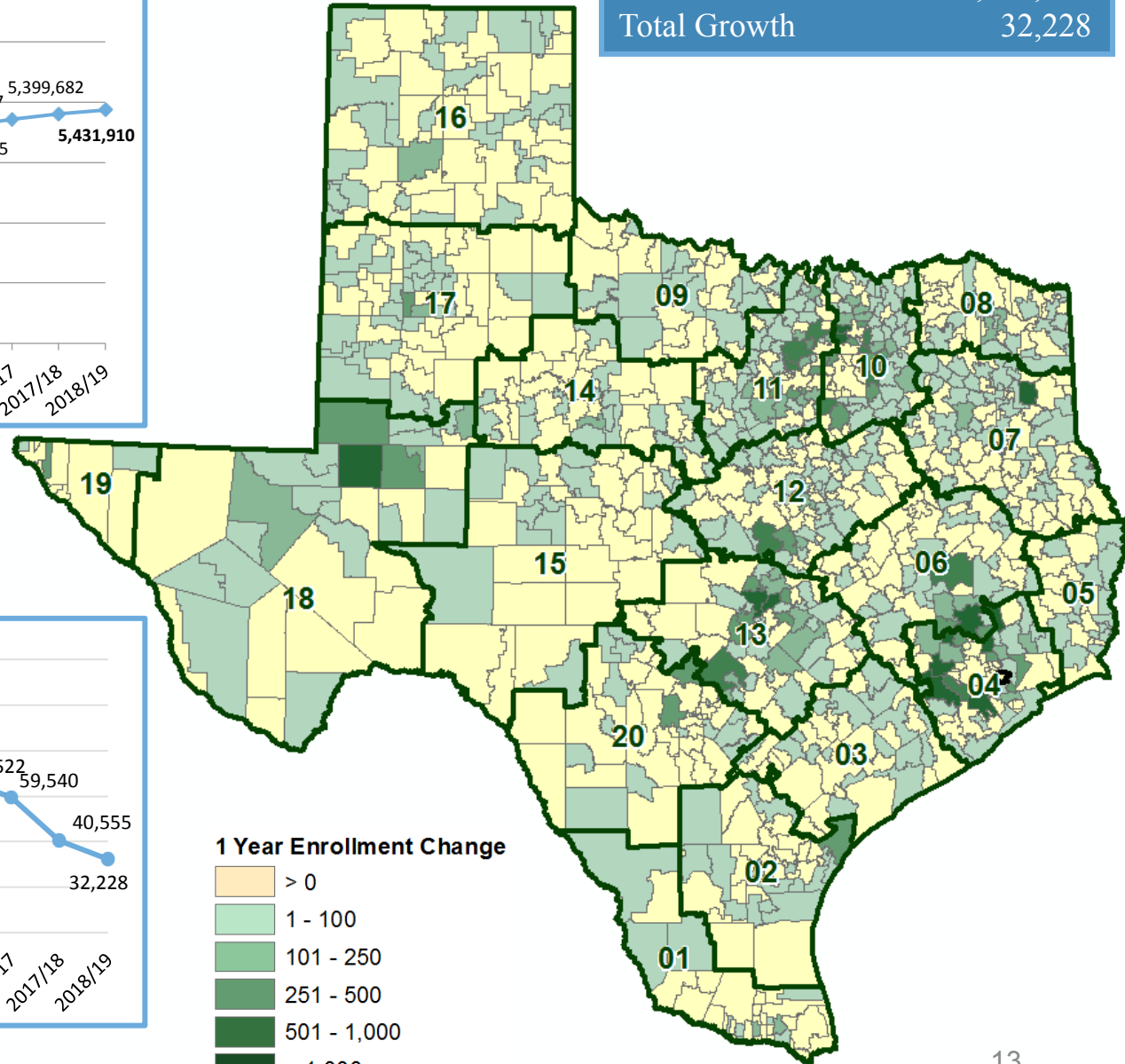
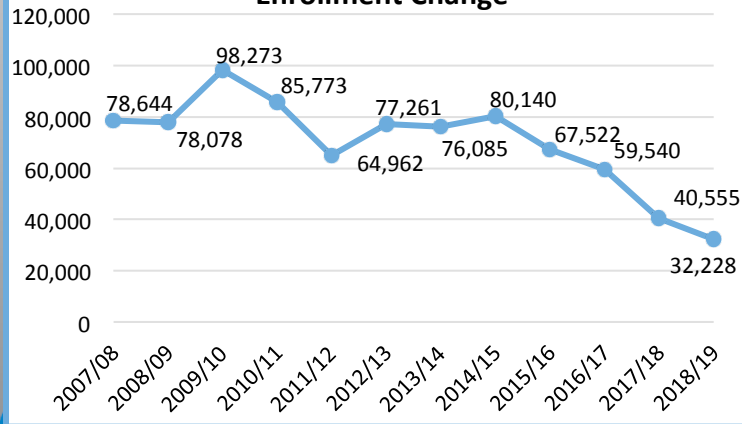
2018/19 State Enrollment

Total Enrollment 5,431,910
Total Growth 32,228

Total State Enrollment



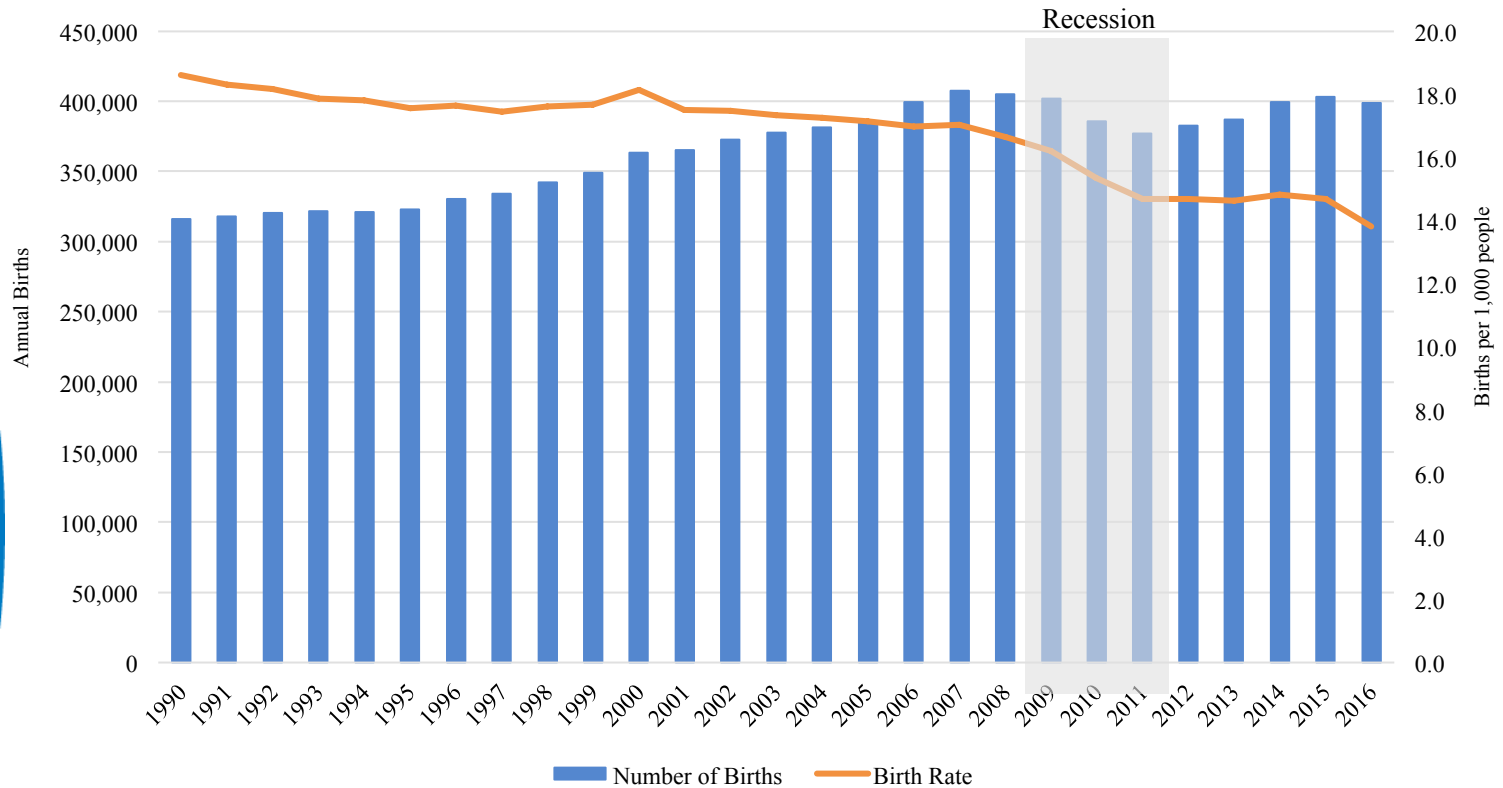
Enrollment Change





Texas Birth Statistics

Texas Birth Statistics, 1990 - 2016



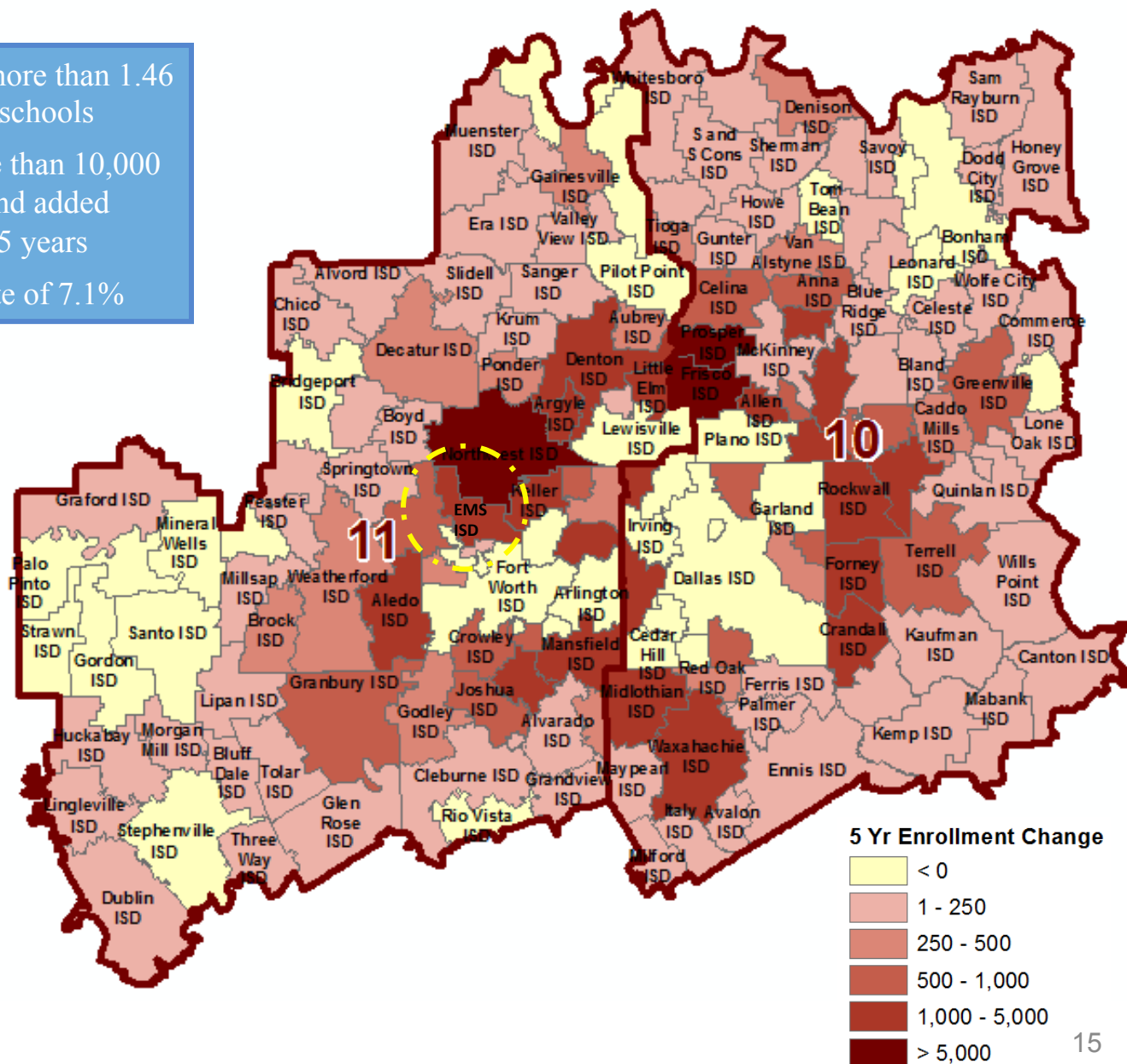
- In Texas, nearly 400,000 babies were born in 2016
- In 2014, the birth rate rose for the first time since 2005, as the economy grew and the unemployment rate dropped below 5%, but overall the birth rate has remained well below pre-recession levels and has been declining for decades





Region 10 & 11 Enrollment Trends

- Region 10 and 11 enroll more than 1.46 million students in public schools
- These regions added more than 10,000 students in the last year, and added nearly 104,000 in the last 5 years
- This is a 5 year growth rate of 7.1%





Ten Year Forecast

By Grade Level

	EE/PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	Total %
2014/15	458	1,300	1,503	1,520	1,406	1,400	1,373	1,474	1,453	1,367	1,528	1,433	1,323	1,121	18,659		
2015/16	461	1,291	1,359	1,533	1,552	1,451	1,463	1,427	1,531	1,499	1,512	1,533	1,384	1,207	19,203	544	2.92%
2016/17	455	1,327	1,363	1,404	1,590	1,583	1,510	1,512	1,474	1,552	1,595	1,506	1,488	1,294	19,653	450	2.34%
2017/18	524	1,255	1,340	1,328	1,389	1,518	1,535	1,466	1,489	1,467	1,620	1,578	1,417	1,391	19,317	-336	-1.71%
2018/19	495	1,342	1,383	1,387	1,396	1,472	1,626	1,636	1,589	1,539	1,628	1,628	1,503	1,333	19,957	640	3.31%
2019/20	495	1,424	1,481	1,459	1,479	1,465	1,569	1,731	1,707	1,637	1,645	1,630	1,560	1,459	20,741	784	3.93%
2020/21	495	1,473	1,536	1,532	1,538	1,533	1,550	1,659	1,793	1,727	1,749	1,653	1,548	1,496	21,282	541	2.61%
2021/22	495	1,540	1,608	1,599	1,596	1,606	1,619	1,639	1,728	1,830	1,857	1,745	1,578	1,485	21,925	643	3.02%
2022/23	495	1,568	1,663	1,670	1,674	1,670	1,698	1,722	1,689	1,761	1,949	1,856	1,664	1,520	22,599	674	3.07%
2023/24	495	1,605	1,696	1,718	1,744	1,750	1,747	1,799	1,790	1,731	1,883	1,947	1,768	1,609	23,282	683	3.02%
2024/25	495	1,654	1,745	1,773	1,796	1,812	1,836	1,856	1,864	1,827	1,865	1,881	1,856	1,729	23,989	707	3.04%
2025/26	495	1,712	1,788	1,810	1,855	1,859	1,887	1,951	1,920	1,902	1,959	1,864	1,817	1,816	24,635	646	2.69%
2026/27	495	1,749	1,848	1,854	1,887	1,921	1,932	1,990	2,023	1,963	2,042	1,968	1,807	1,775	25,254	619	2.51%
2027/28	495	1,800	1,894	1,923	1,939	1,952	2,004	2,042	2,061	2,001	2,107	2,042	1,894	1,768	25,922	668	2.65%
2028/29	495	1,857	1,951	1,968	2,009	2,007	2,036	2,116	2,114	2,038	2,146	2,109	1,972	1,852	26,670	748	2.89%

*Yellow box = largest grade per year

*Green box = second largest grade per year

- EMS ISD could enroll more than 20,700 students in fall 2019
- 5 year growth = 3,325 students
- 2023/24 enrollment = 23,282 students
- 10 year growth = 6,713 students
- 2028/29 enrollment = 26,670 students





Summary – Demographic Services

- The DFW Metroplex is a top MSA for job growth, and this trend is likely to continue for several years
- Positive job and population growth has created strong housing demand in the DFW Metroplex
- Tarrant County has roughly 11,000 lots available to build on and approximately 70,200 lots for future development
- DFW home prices have well surpassed pre-recession peaks and have grown by 50%-60% since 2010
- Eagle Mountain-Saginaw ISD will likely grow more than 6,700 additional students over the next 10 years
- Questions?

Templeton Demographics
(817) 251-1607