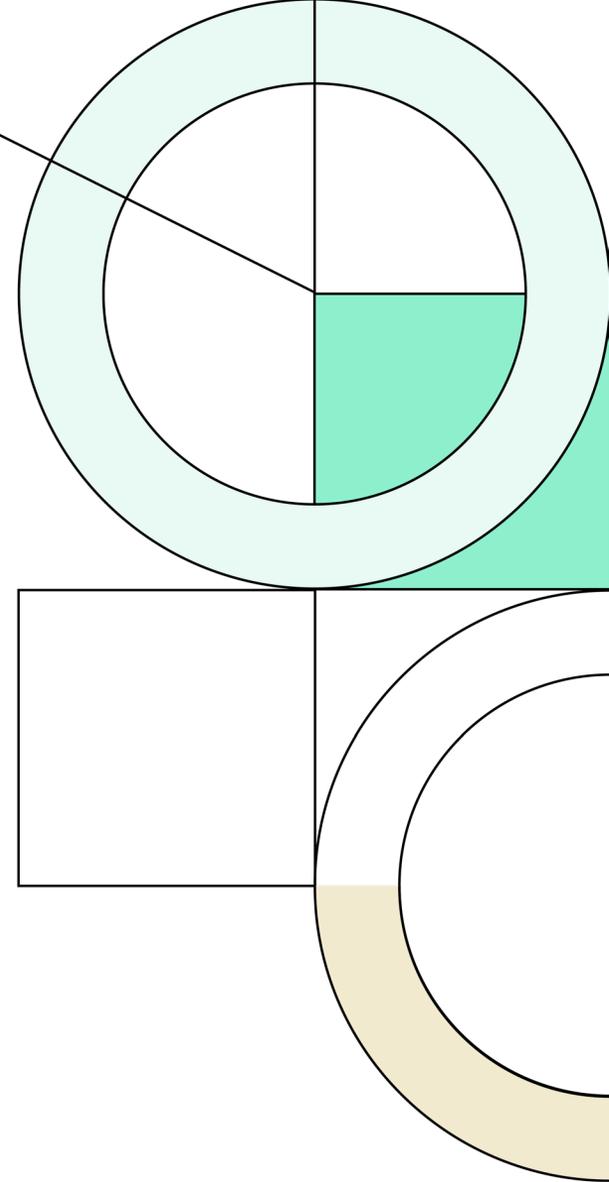




Van Alstyne Independent School District

Demographic Study Winter 2026

February 2026



Zonda™

Demographics

Zonda's demographic division, formerly Templeton Demographics, was established in 2006 and has been assisting public schools with demographic services for over 18 years. From day one, our mission has been to continually improve and provide accurate and timely data combined with outstanding consulting services. The fusion of demographics with unparalleled housing data from Zonda has made us a leader in the market. The data provides an in-depth look at how the impact of housing and development influences decisions made now and in the future across the nation. The 12 dedicated employees in our division work diligently to provide the best possible data and enrollment projections to help you make informed decisions for your school system.

We are the #1 demographer in the state of Texas and now work with clients in Arkansas, Colorado, Georgia, Missouri, Oklahoma, North Carolina and South Carolina.

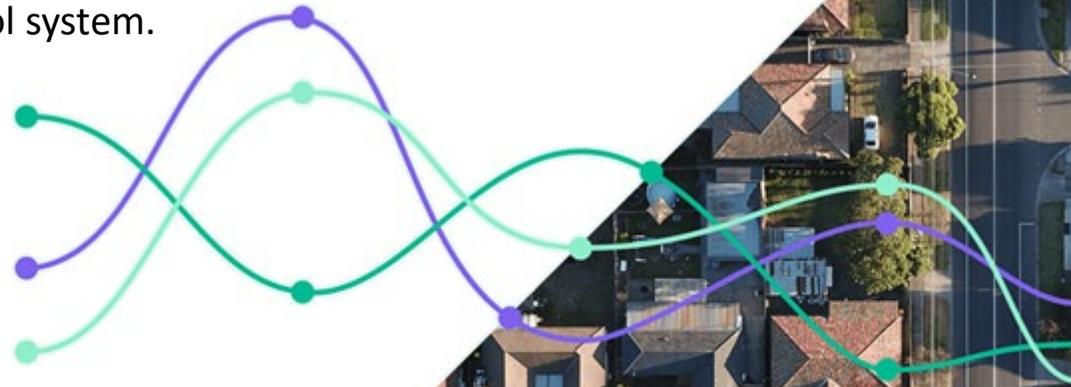
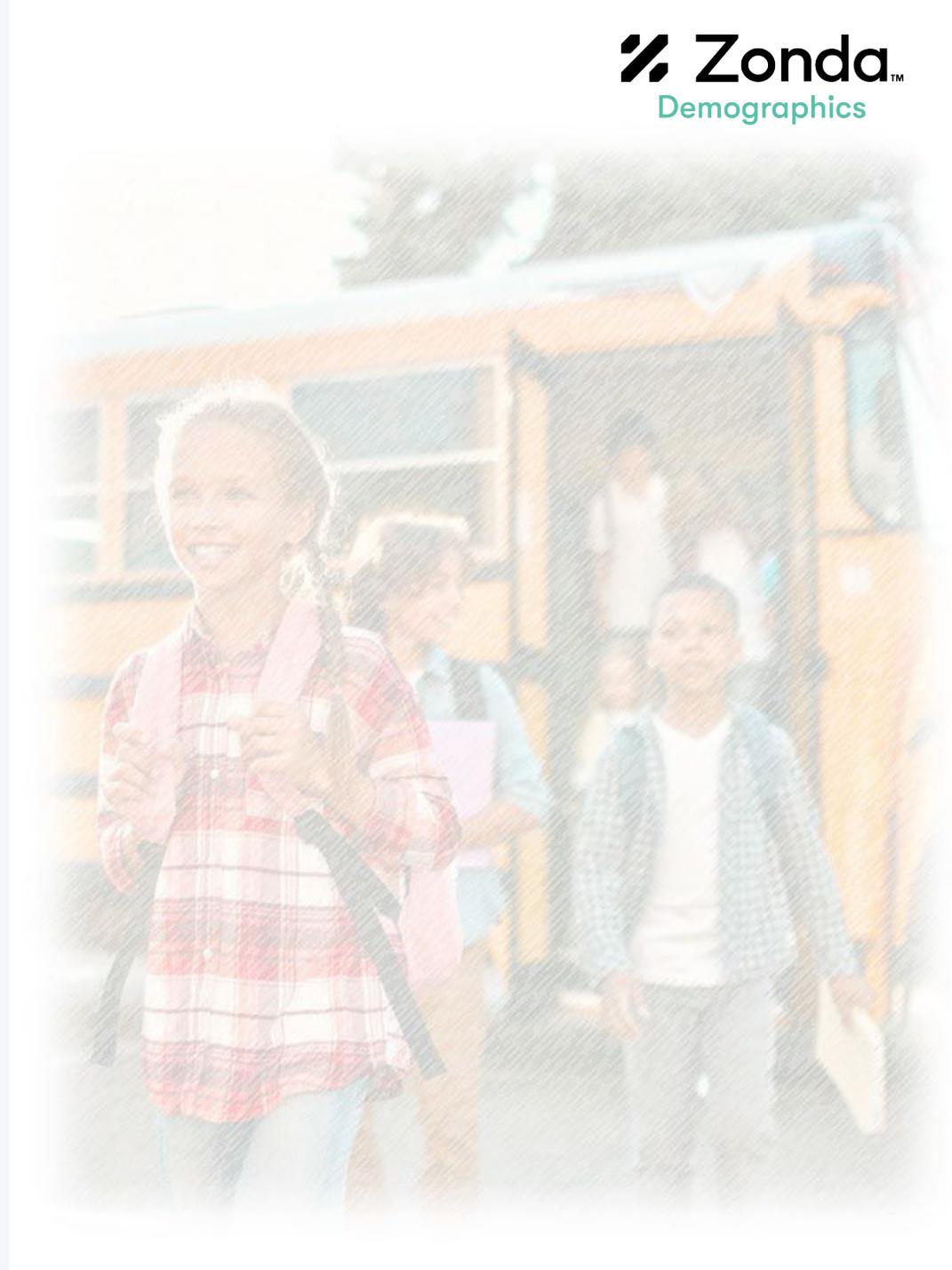


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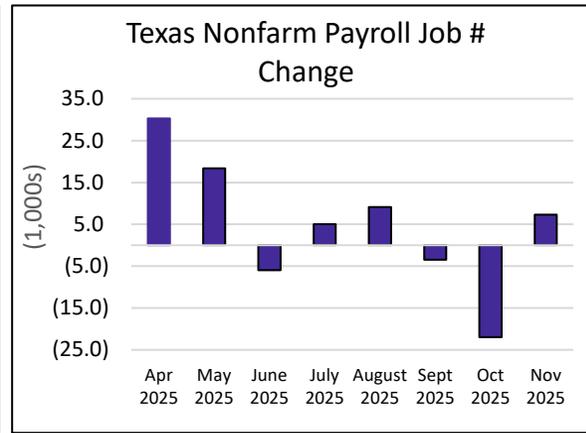
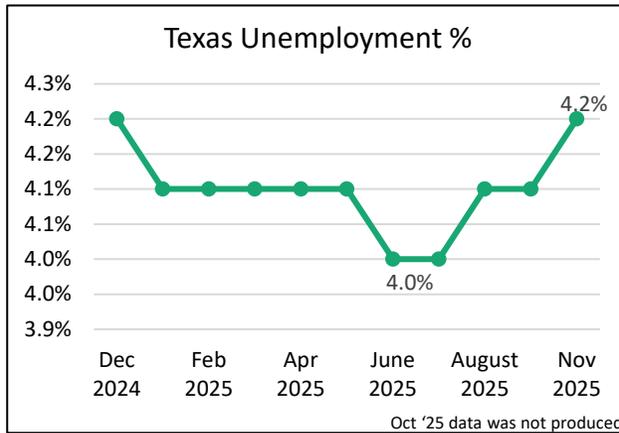
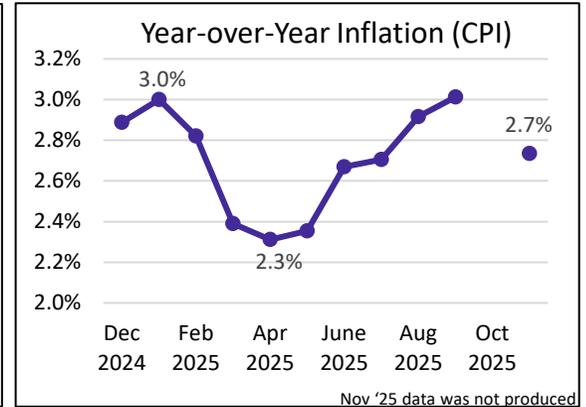
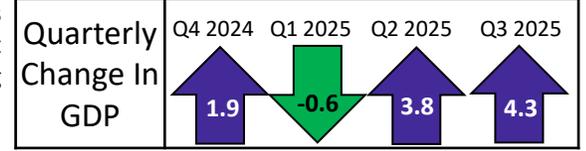
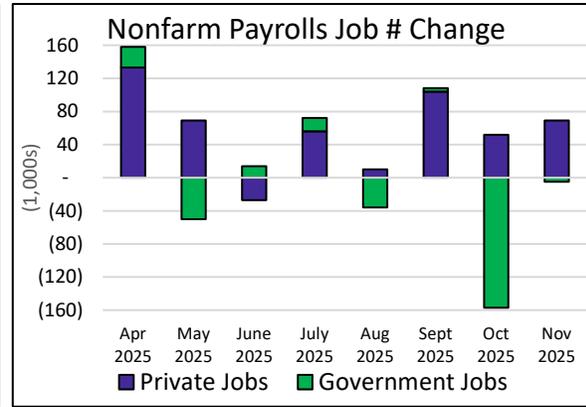
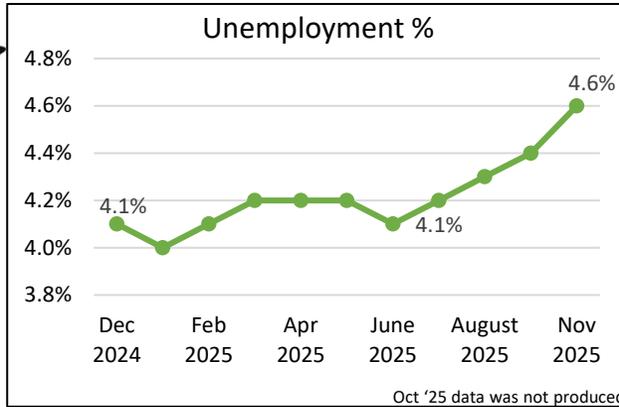
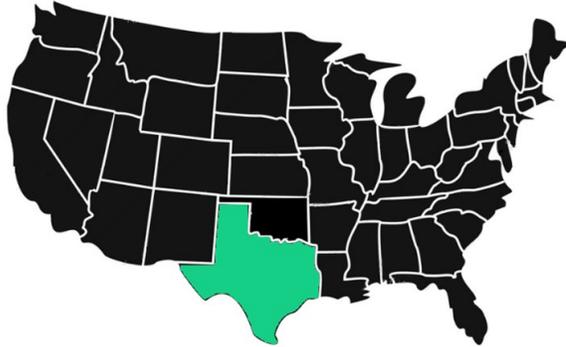


Economic Conditions

National, State, and Local Economic Data

National Economic Conditions

The national unemployment rate has increased from 4.0% to 4.6% over the past year. The current year's monthly payroll numbers peaked in April and government jobs declined in October due to government shutdown. Inflation rates have increased after slowing but have remained at 3% or lower. The GDP after slowing in early 2025, but the 2nd and 3rd quarters' inflation data remains higher than the target rate.

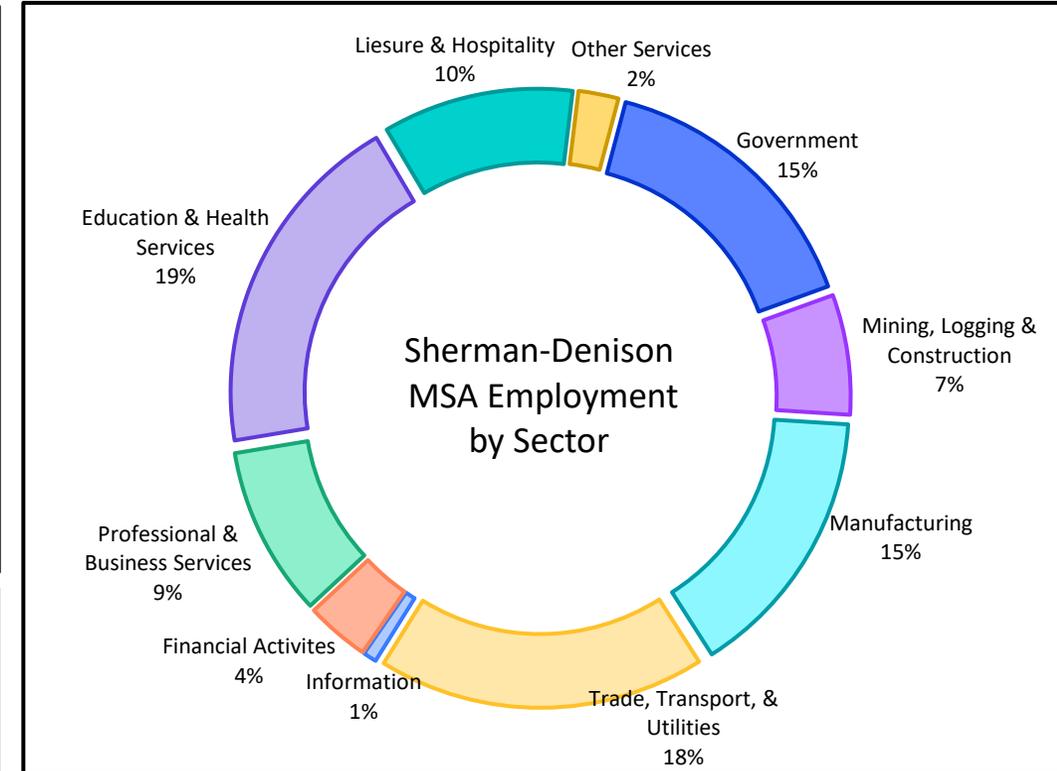
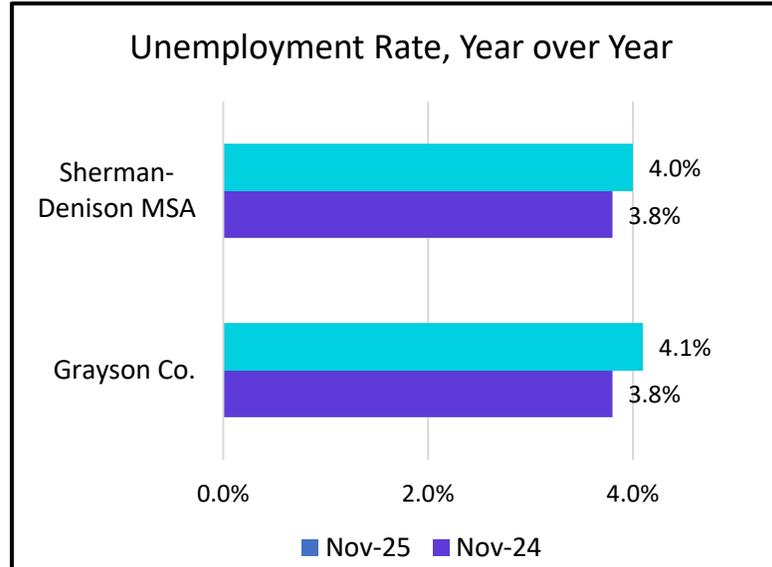


Texas reported a 6.8% annual GDP growth rate for Q2 2025, outpacing the national average of 3.8%, according to the U.S. Bureau of Economic Analysis. Personal incomes rose 6.4%, also above the national rate. Governor Abbott credited the state's skilled workforce and pro-growth policies. Texas continues to lead in job creation, energy innovation, and financial sector expansion. Since 2020 over 200 company headquarters have relocated to the state.

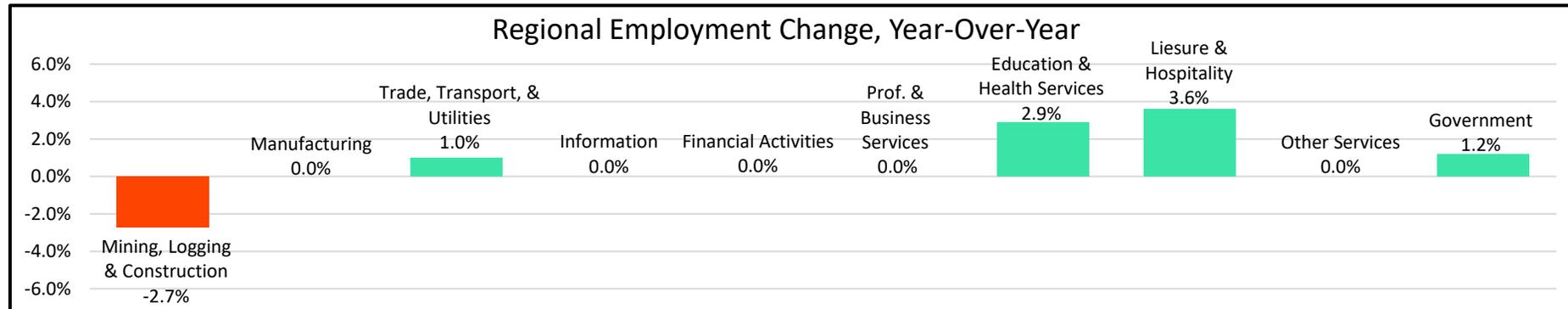
Office of the Texas Governor | Greg Abbott— September 26, 2025; buildremote.com

Source: US BLS; US BEA

- Unemployment levels in the region have increased approximately 0.2% to 0.3% from last year numbers
- 600 jobs have been added in the area over the past 12 months
- Largest employers in the area were related Education & Health Services, as well as Trade, Transportation, & Utilities, as well sectors
- Sector with the greatest rate of increases in job numbers over the past year was in the Leisure & Hospitality sector
- The largest rate of decline this past year was in Mining, Logging, & Construction the last 12 months



All Industry Sectors	Nov-2024	Nov-2025	YOY Change
(Sherman-Denison MSA) Total Nonfarm Employment #s	54,200	54,800	1.1%



Source: US BLS; US BEA

Grayson County Major Employers	Industry Type	# of Employees
Texoma Medical Center	Healthcare	3,500
Tyson Foods	Food Processing	1,765
Texas Instruments	Semiconductors	1,000
Ruiz Foods	Food Processing	1,000
Wal-Mart/Sam's	Retail	900
Cigna	Insurance	800
Carrus Hospital	Healthcare	650
Coherent	Manufacturing	577
Alorica	Customer Service	452
Emerson	Manufacturing	450
Wilson N. Jones Regional Health System	Healthcare	443
Capio	Customer Service	400
Globitech	Semiconductors	400
Royal Case	Manufacturing	371
Spectrum Brands-Kwikset	Door Locks	320
Grayson College	Education	312
Casey's Fuel Centers	Fuel Stations	300
	Total	13,640

City, school district, and religious employment excluded.

Source: Sherman EDC/ Denison Dev. Alliance)



 **TEXAS
INSTRUMENTS**

Texas Instruments has completed construction on the first of its four semiconductor plants on its 1,200 acre site in Sherman. Production began in late 2025.

When completed, the facility will support appx. 3,000 employees and serve as a major employer in the region, as well as make the area a national leader in semiconductor manufacturing. The facility represents a \$40 billion investment.

Apple has also announced an increase in its spending commitment to \$600 billion for U.S. based semiconductor manufacturing at TI's facilities in Sherman and Utah.

Courtesy:  **SHERMAN**
ECONOMIC DEVELOPMENT CORPORATION

Single-Family Housing

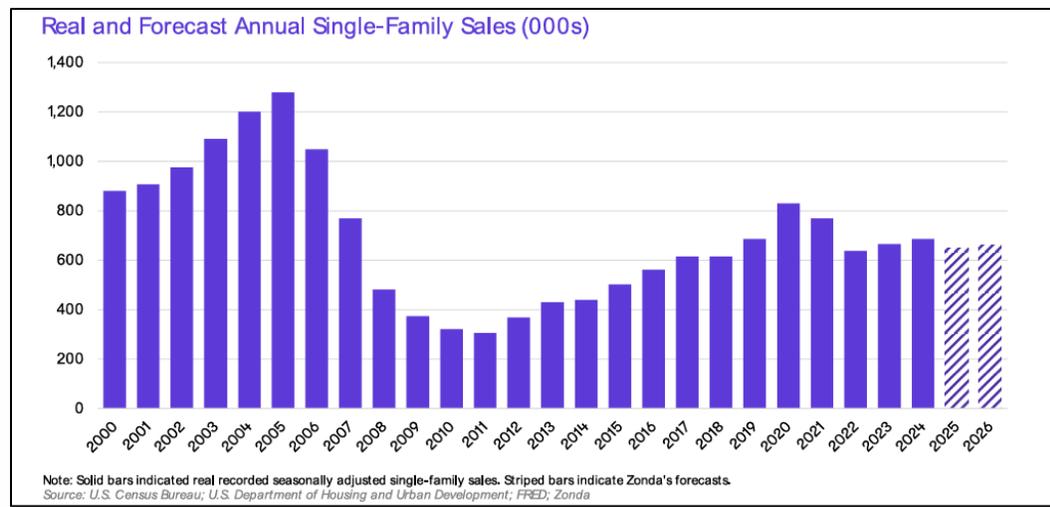
National Market Information & Area Sales Data





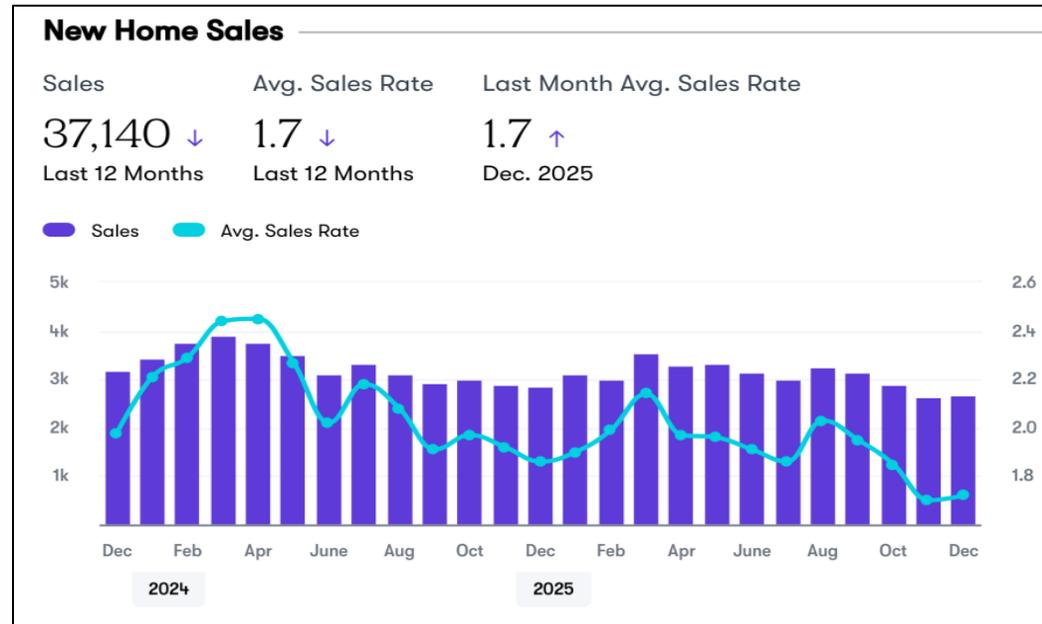
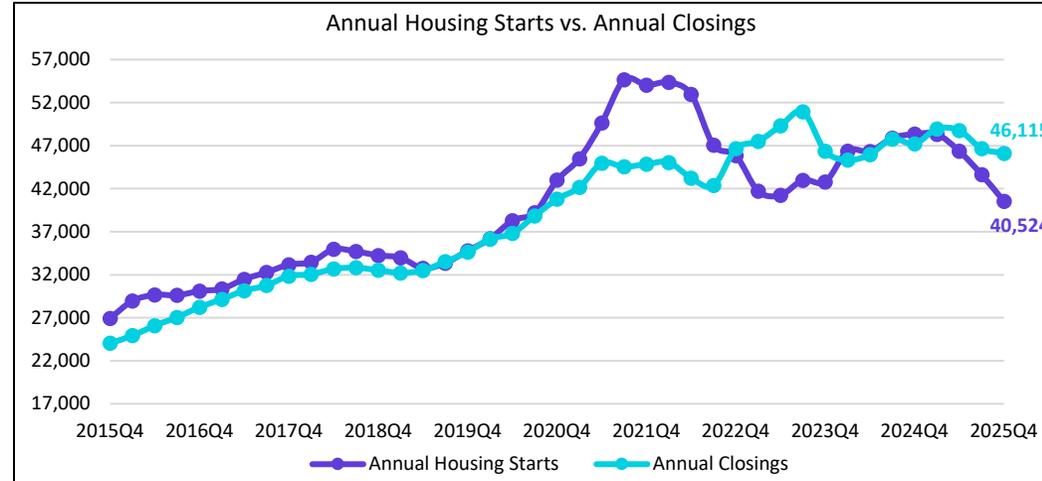
New home closings have declined in 2025 after increasing in 2024. Starts also declined after a significant upswing starting in 2023.

Among Zonda's top 50 major markets across the country, 36% were overperforming, 42% were average, and 22% were underperforming.



Single-family sales for new communities are averaging two homes per month. 60% of builders are offering mortgage rate buydowns, and yet 70% of builders report demand was slower than expected.

Monitoring Several Variables Impacting the Market Potential shifts in monetary policy, fiscal policy, international relations, investor sentiment, and consumer behavior are all being evaluated as to what impacts we may see in the coming months.

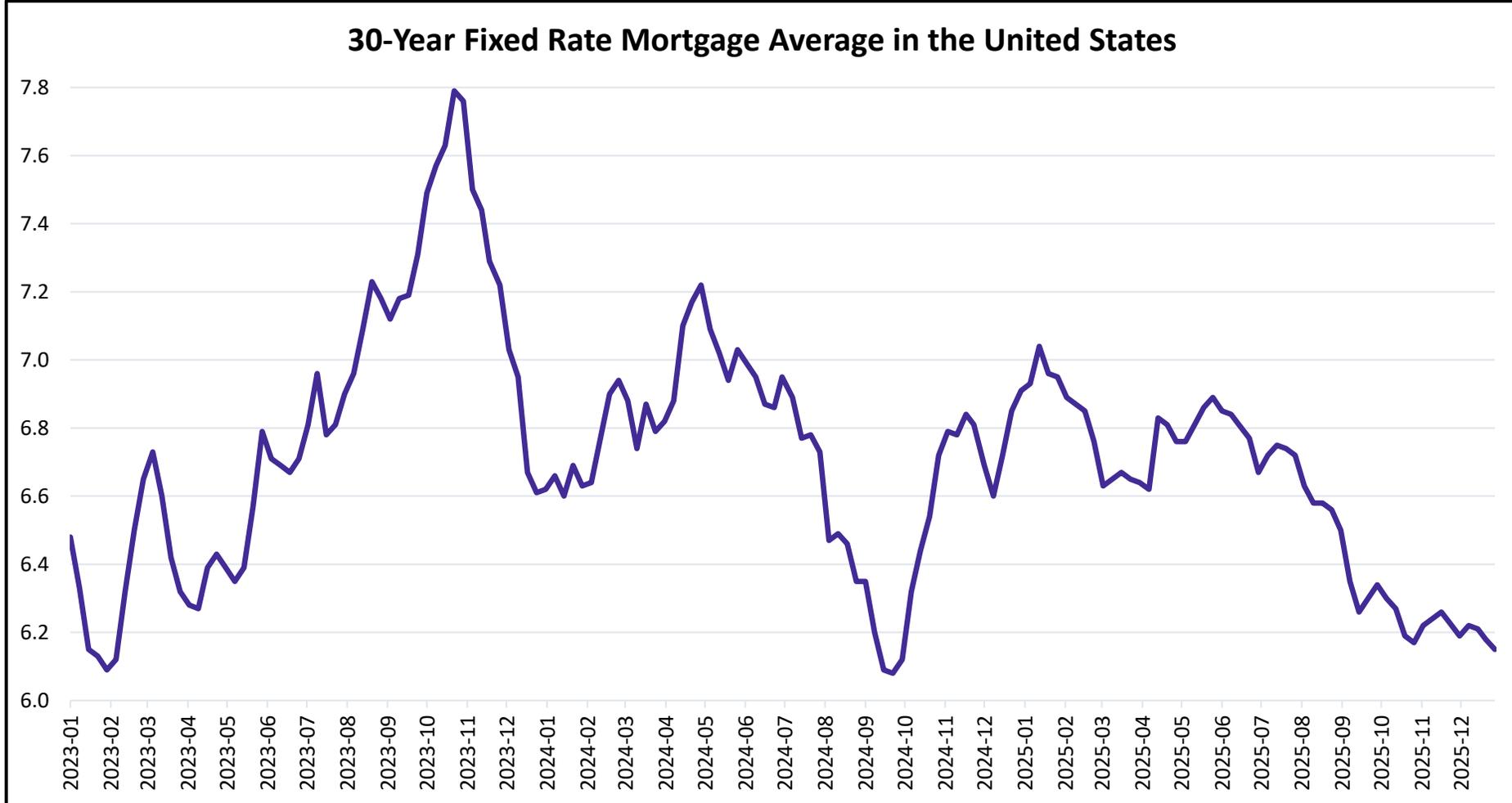


Dallas/Fort Worth maintains an average monthly sales rate of 1.7 net monthly sales per community among active projects. Down 6.3% from 2024.

Among Texas' four major markets, one market (San Antonio) is overperforming, two markets (Dallas and Houston) are average, and one market (Austin) is underperforming in terms of new home sales adjusted for supply and seasonality.

The average monthly sales rate increased slightly in December after 3 months of declining sales.

Builder surveys report that affordability and consumer confidence are keeping consumers on the sidelines leading to tempering of new home activity.



Source: US FRED

The Federal Reserve Board cut its benchmark federal funds rate by 25 basis points on September 17th, October 29th, and December 10th resulting in a reduction of the 30-year fixed rate mortgage to 6.15% at the end of December, the lowest since October 2024.

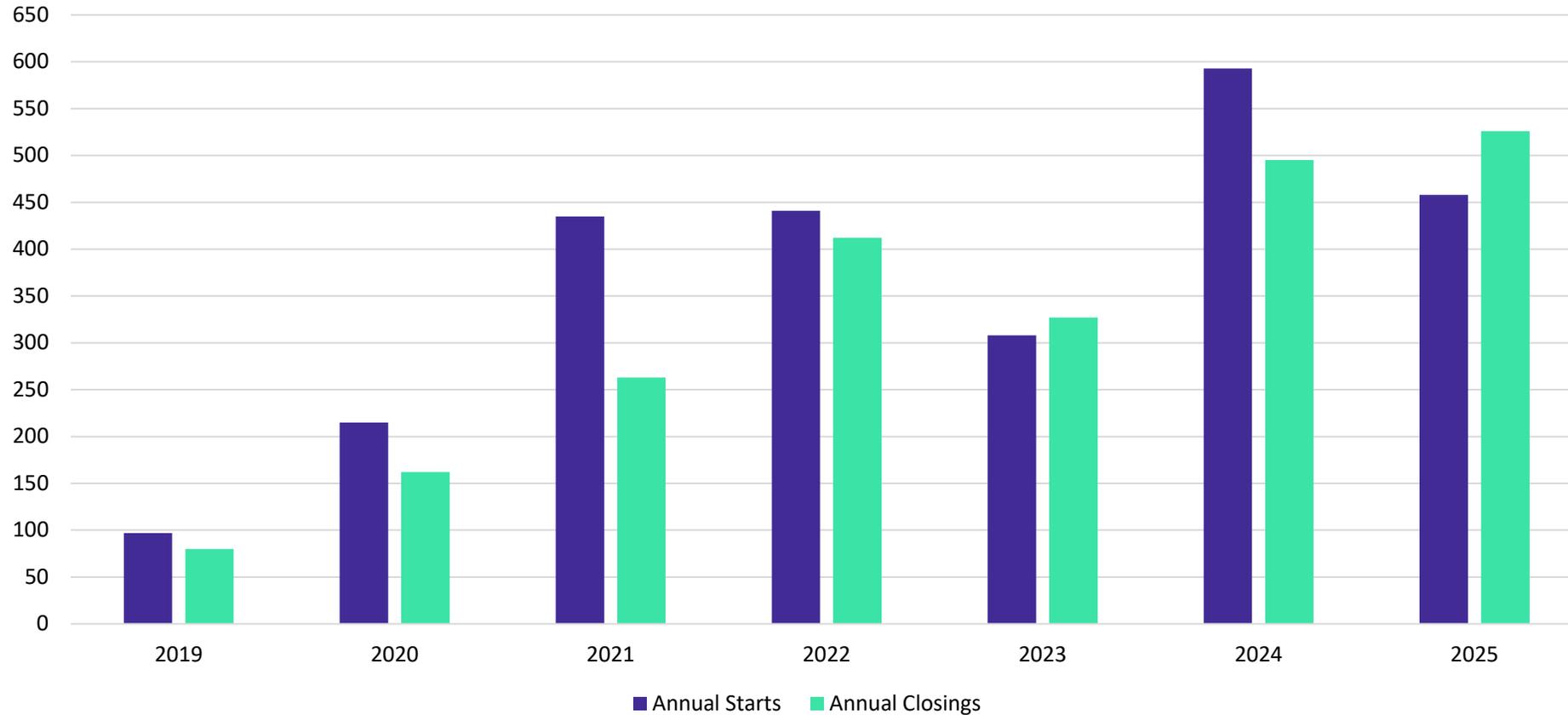
The move was driven by signs of a softening labor market and weakening job growth.

Mortgage rates remain elevated compared to pre-2022 levels, reflecting ongoing inflationary pressures and cautious monetary policy.



Van Alstyne ISD New Home Activity

Single-Family Housing



Starts	2019	2020	2021	2022	2023	2024	2025
1Q	5	21	64	104	38	207	195
2Q	29	54	142	141	61	139	130
3Q	38	47	126	98	92	105	69
4Q	25	93	103	98	117	142	64
Total	97	215	435	441	308	593	458

Closings	2019	2020	2021	2022	2023	2024	2025
1Q	24	20	29	57	81	71	138
2Q	9	41	80	79	106	134	136
3Q	21	49	61	134	86	147	165
4Q	26	52	93	142	54	143	87
Total	80	162	263	412	327	495	526

Source: Zonda



Van Alstyne ISD New Home Activity by Elementary Zone

Single-Family Housing



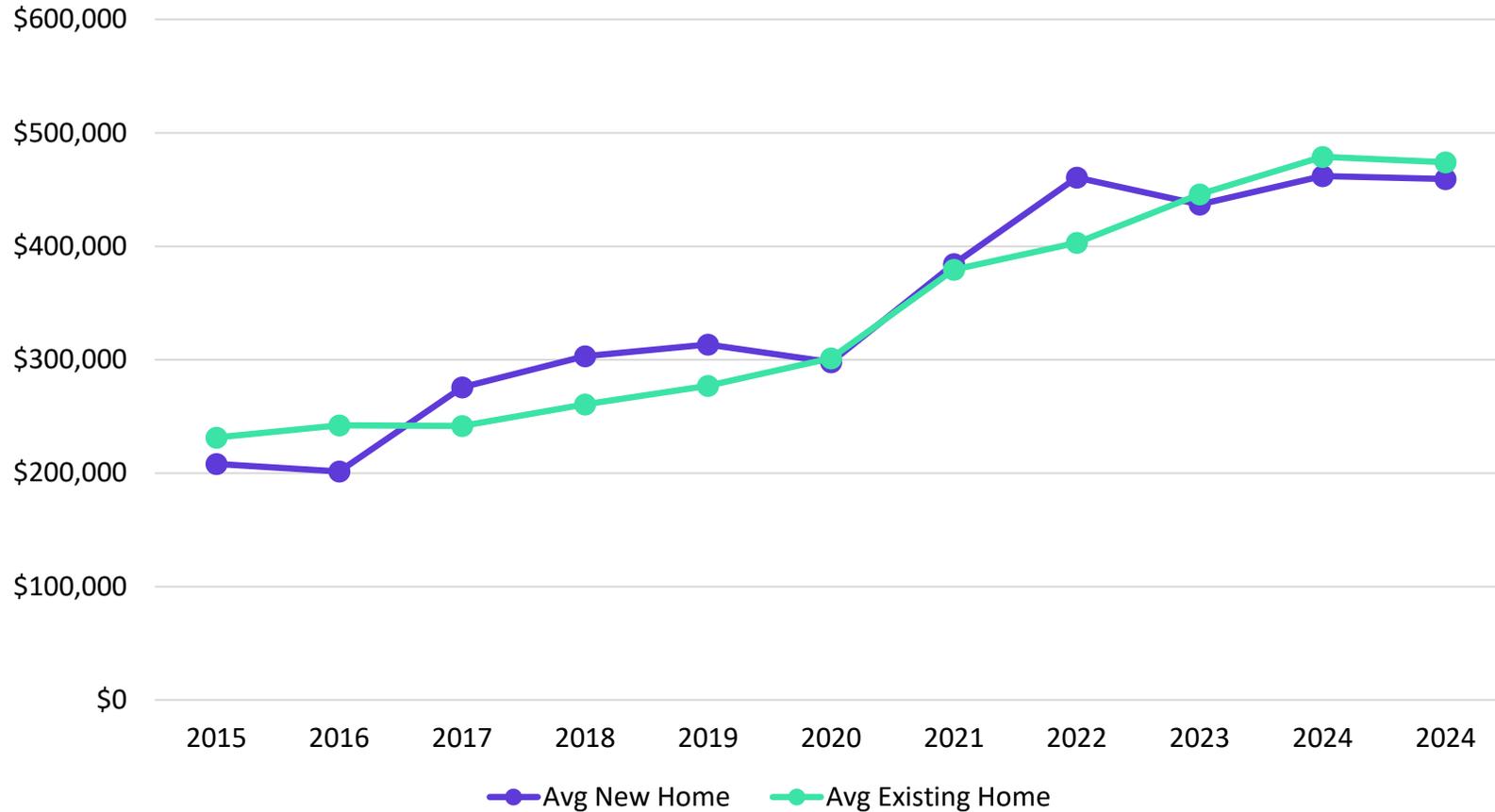
Elementary	Annual Starts	Quarter Starts	Annual Closings	Quarter Closings	Under Const.	Inventory	Vacant Dev. Lots	Futures
PARTIN	136	22	132	18	30	90	619	1,816
SANFORD	161	21	176	35	57	94	331	449
WILLIAMS	161	21	218	34	49	102	281	7,977
Grand Totals	458	64	526	87	136	286	1,231	10,242

 Highest activity in the category

 Second highest activity in the category

Van Alstyne ISD Home Price Analysis

Single-Family Housing

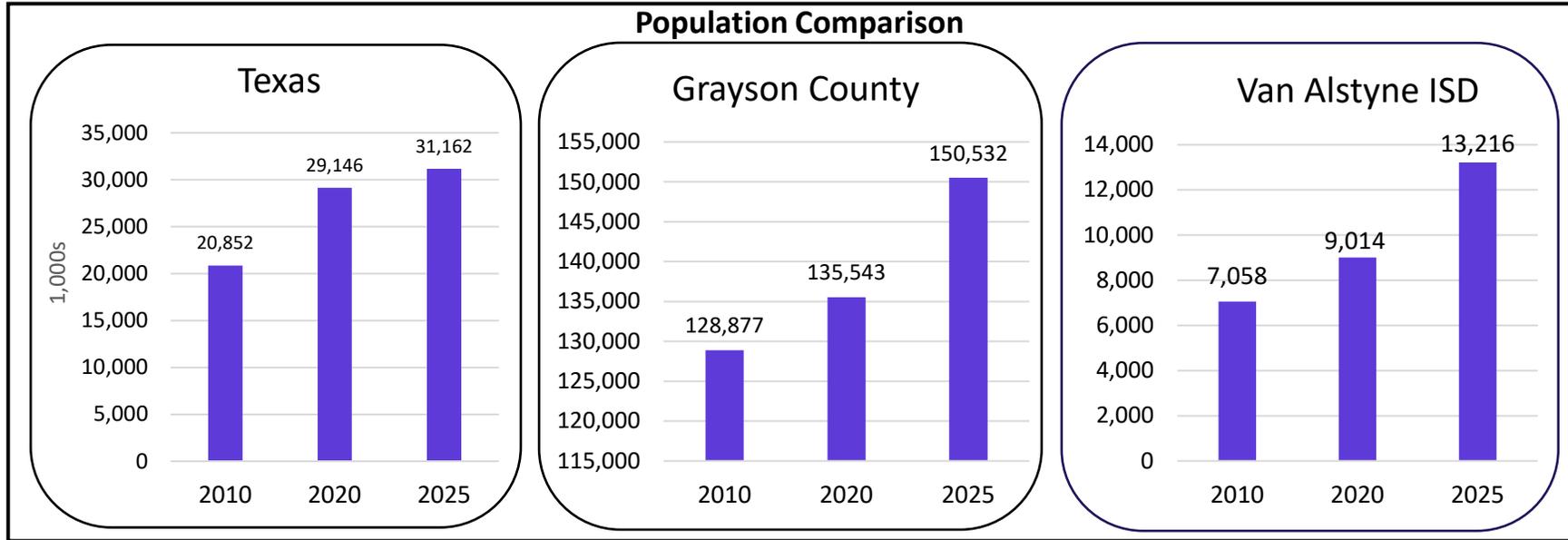


	Avg New Home	Avg Existing Home
2015	\$208,172	\$231,399
2016	\$201,383	\$242,001
2017	\$275,639	\$241,656
2018	\$303,103	\$260,554
2019	\$313,450	\$276,931
2020	\$297,699	\$301,335
2021	\$384,221	\$379,258
2022	\$460,698	\$403,021
2023	\$436,771	\$445,713
2024	\$461,876	\$478,853
2024	\$459,265	\$474,145

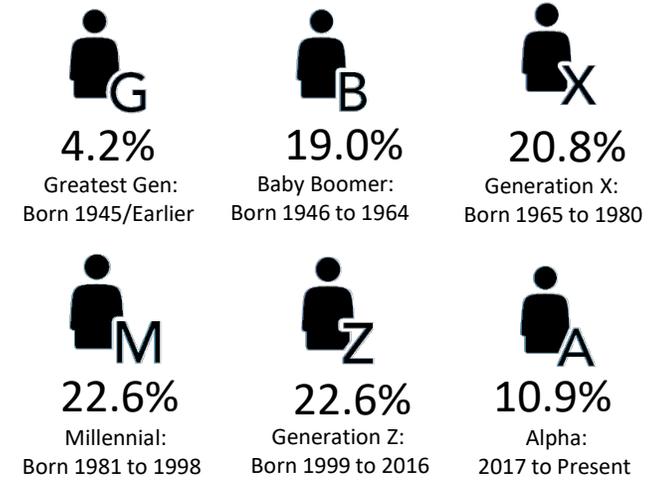
- Both the average existing and average new home sale price in Van Alstyne ISD have more than doubled over the past 10 years, with new home prices rising nearly \$251,100 and existing home prices rising nearly \$242,750
- New home sales within VAISD accounted for 63% of the total home sales in 2025

Demographics

District Demographic Data/Statistics



Population by Generation



Commuters



Approx.
45.5%
Spend 5+ hours commuting to and from work per week
*68% Drive Alone to Work

Age/Income



Median Age



Median Household Income



Wealth Index



Housing Affordability



Diversity Index

Education



No High School Diploma



20.2%
High School Graduate



33.0%
Some College/ Associate's Degree

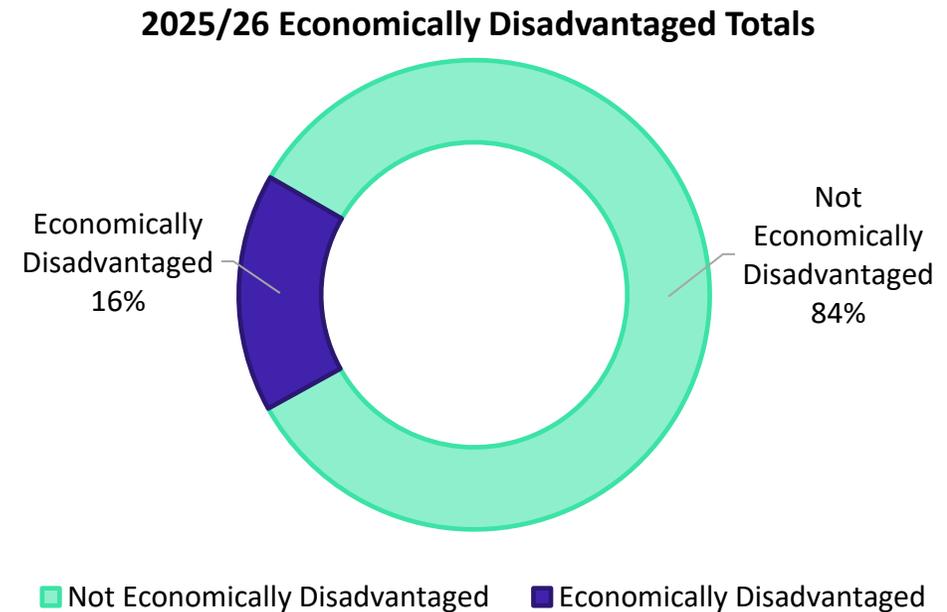
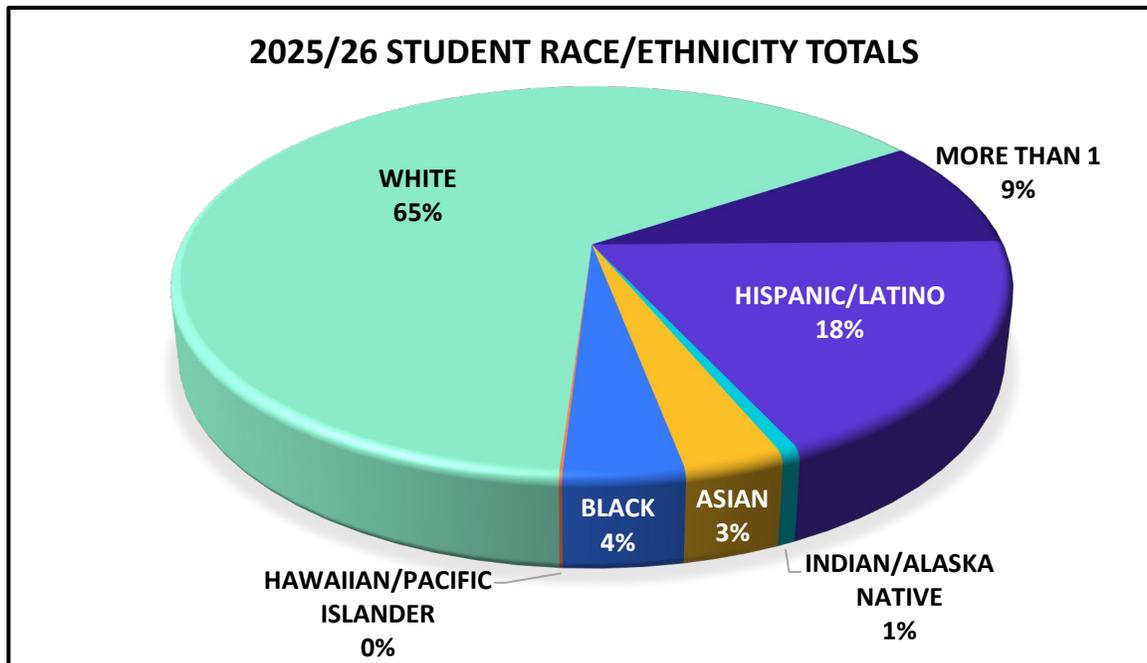


41.7%
Bachelor's/Grad/ Prof Degree



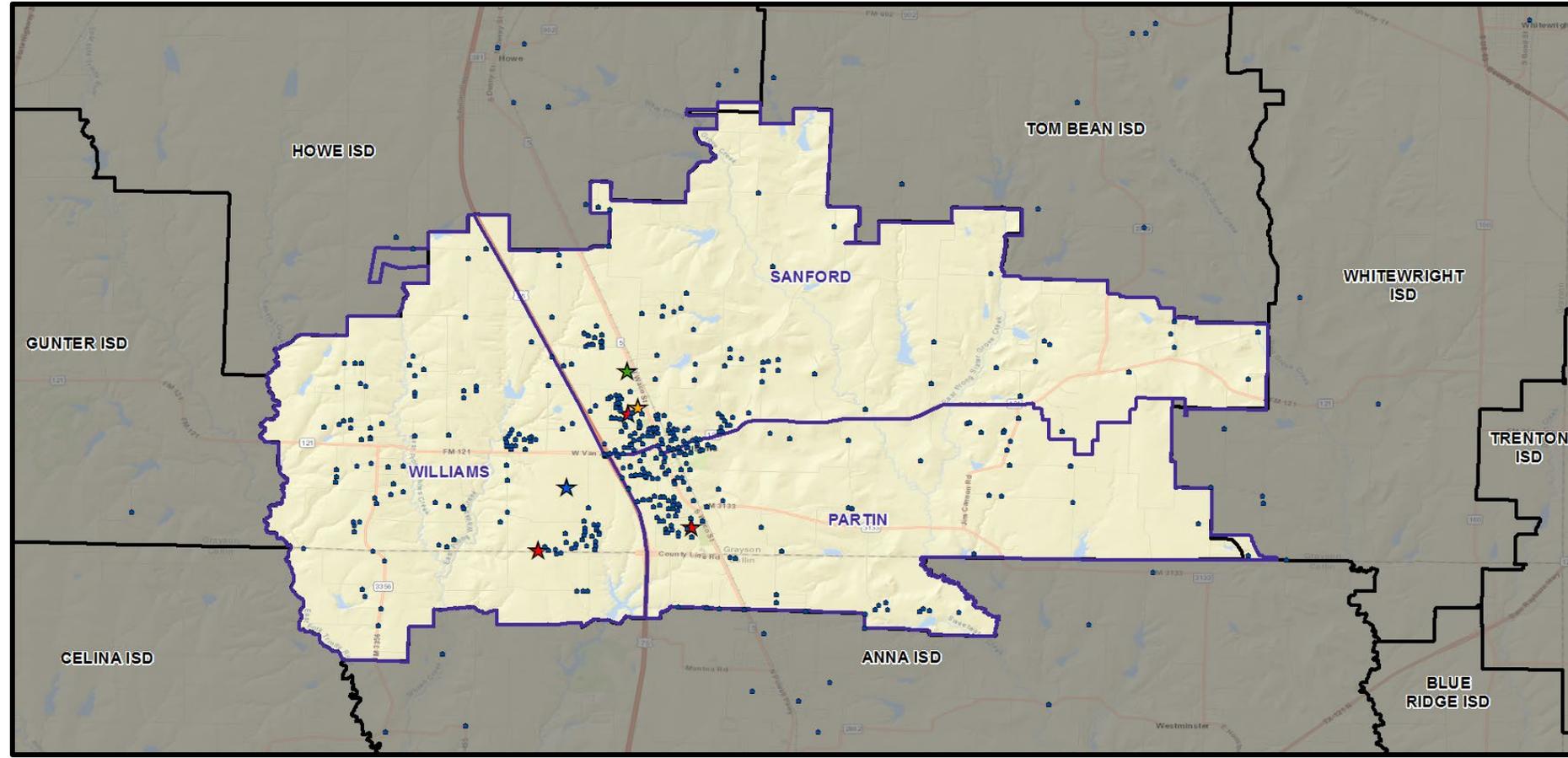
Source: This infographic information contains data provided by Esri (2024), Esri-U.S. BLS (2024), ACS (2018-2022).

Year (Oct.)	Total	Black or African American	%	Hispanic	%	American Indian or Alaska Native	%	Asian	%	White	%	Two or more races	%	Native Hawaiian/ Other Pacific Islander	%	Economically Disadvantaged	% ED
2018/19	1,707	31	1.8%	240	14.1%	14	0.8%	14	0.8%	1,346	78.9%	61	3.6%	1	0.1%	450	26.4%
2019/20	1,798	28	1.6%	298	16.6%	15	0.8%	21	1.2%	1,365	75.9%	68	3.8%	3	0.2%	454	25.3%
2020/21	1,868	23	1.2%	335	17.9%	14	0.7%	21	1.1%	1,395	74.7%	80	4.3%	0	0.0%	494	26.4%
2021/22	2,061	44	2.1%	406	19.7%	18	0.9%	44	2.1%	1,451	70.4%	92	4.5%	6	0.3%	465	22.6%
2022/23	2,285	45	2.0%	492	21.5%	19	0.8%	56	2.5%	1,550	67.8%	122	5.3%	1	0.0%	522	22.8%
2023/24	2,418	63	2.6%	546	22.6%	22	0.9%	66	2.7%	1,594	65.9%	125	5.2%	2	0.1%	563	23.3%
2024/25	2,625	85	3.2%	598	22.8%	18	0.7%	82	3.1%	1,704	64.9%	136	5.2%	2	0.1%	526	20.0%
2025/26	2,899	114	3.9%	533	18.4%	18	0.6%	95	3.3%	1,873	64.6%	263	9.1%	3	0.1%	475	16.4%



Student Density Numbers (2025-26 School Year) -

- There are 194 students that currently reside outside the district
- This represents roughly 6.7% of the total student population
- 1,638 students, or 56.5% of the total student population, resides within the Van Alstyne city limits



Single Family Housing Activity

Area Housing Activity Information



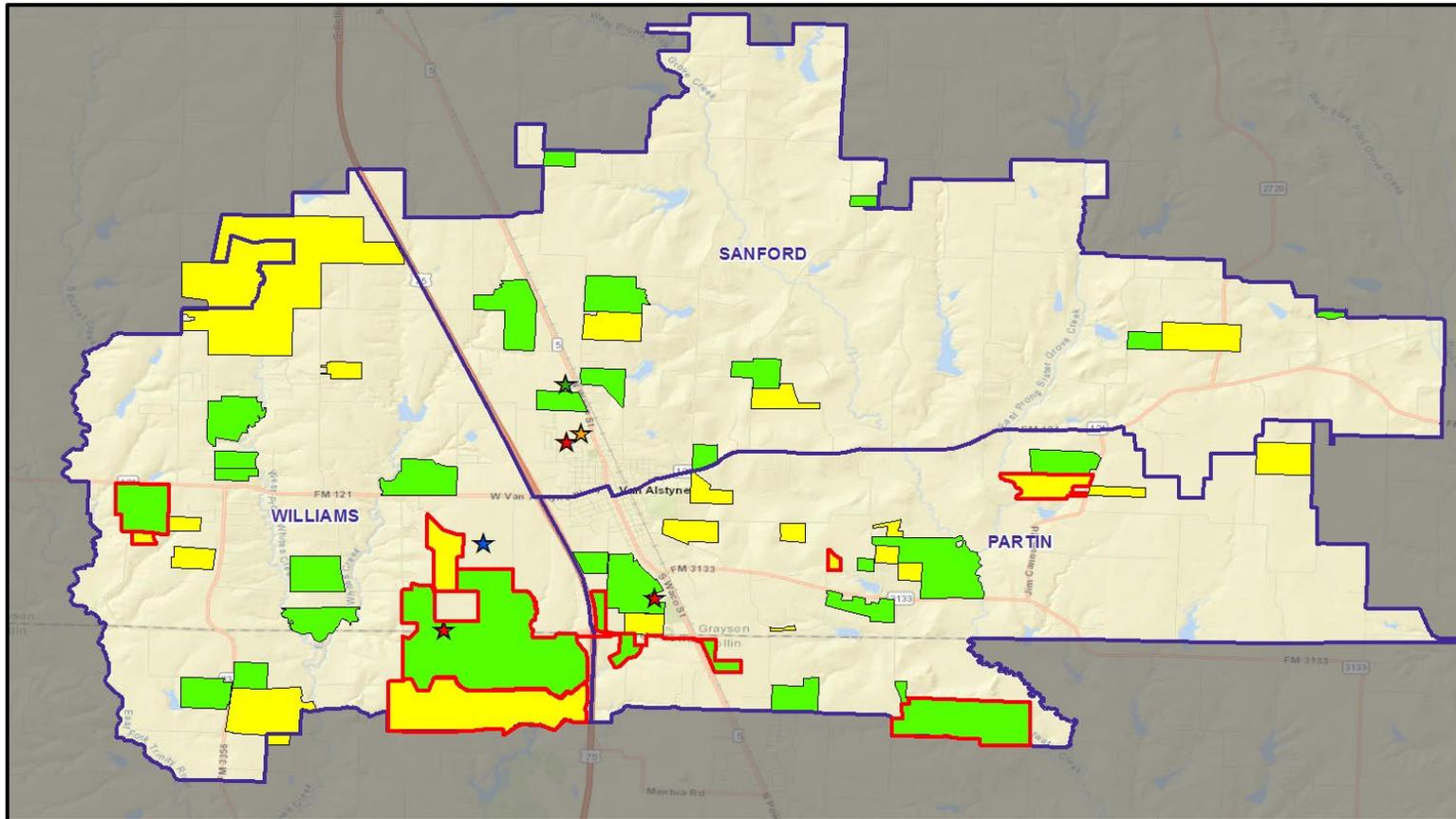


District Future Housing Overview

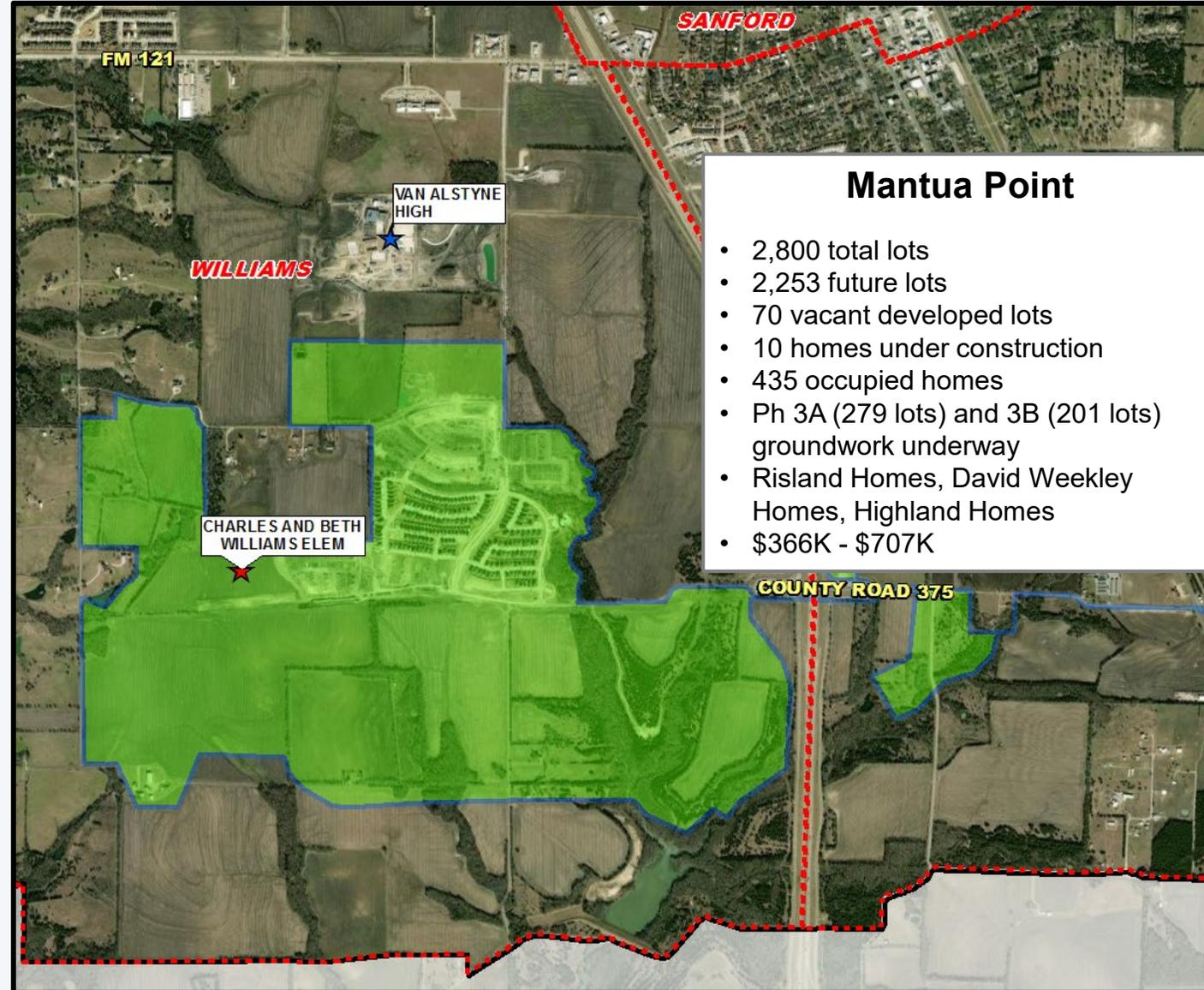
- The district has 29 active subdivisions with approximately 136 homes under construction and more than 1,200 lots ready to be built on
- Within VAISD there are currently 22 potential future subdivisions (yellow polygons) totaling appx. 7,700 single family lots
- Groundwork is underway on more than 1,000 lots within 7 subdivisions

Subdivisions

-  ACTIVE
-  FUTURE
-  Groundwork Underway



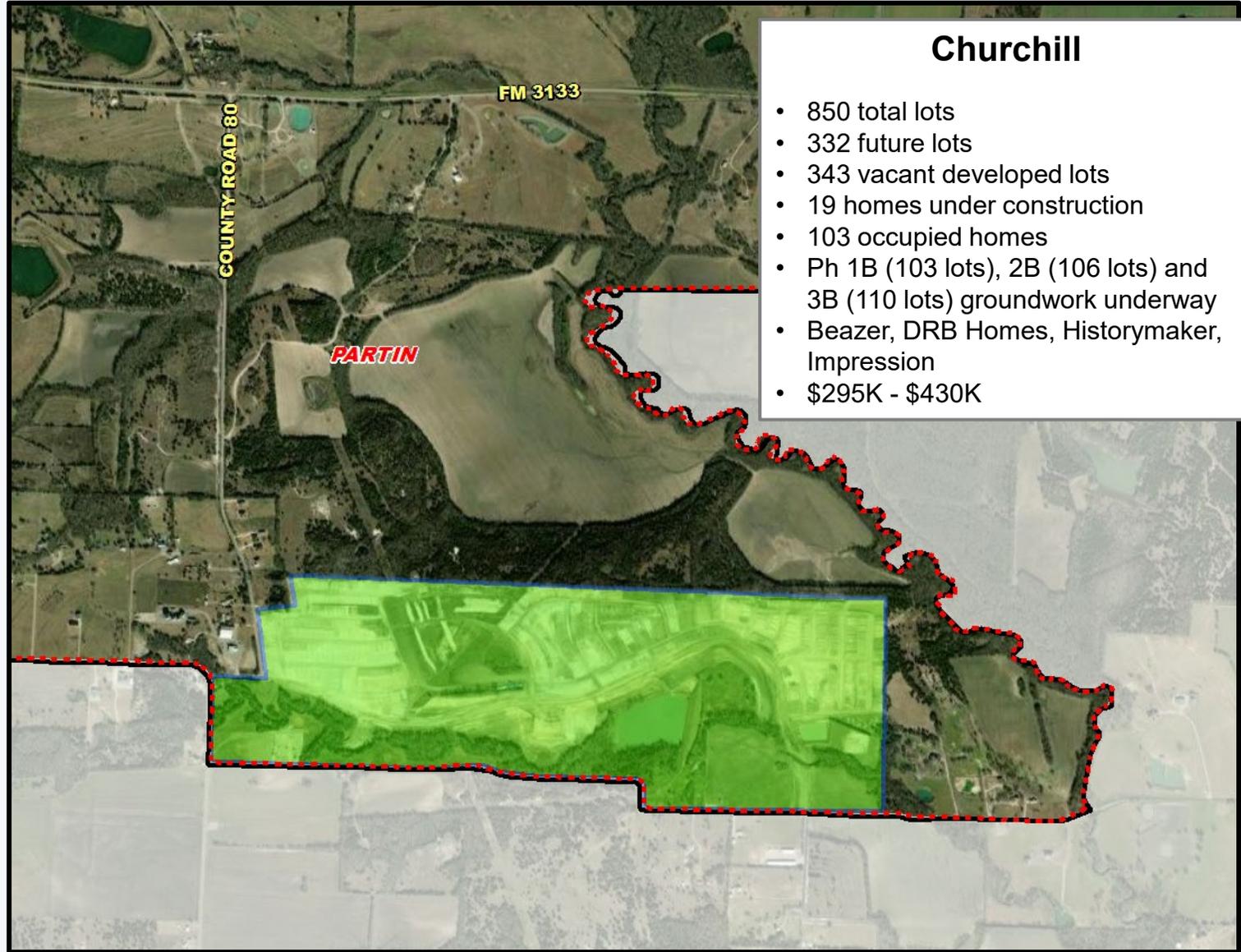
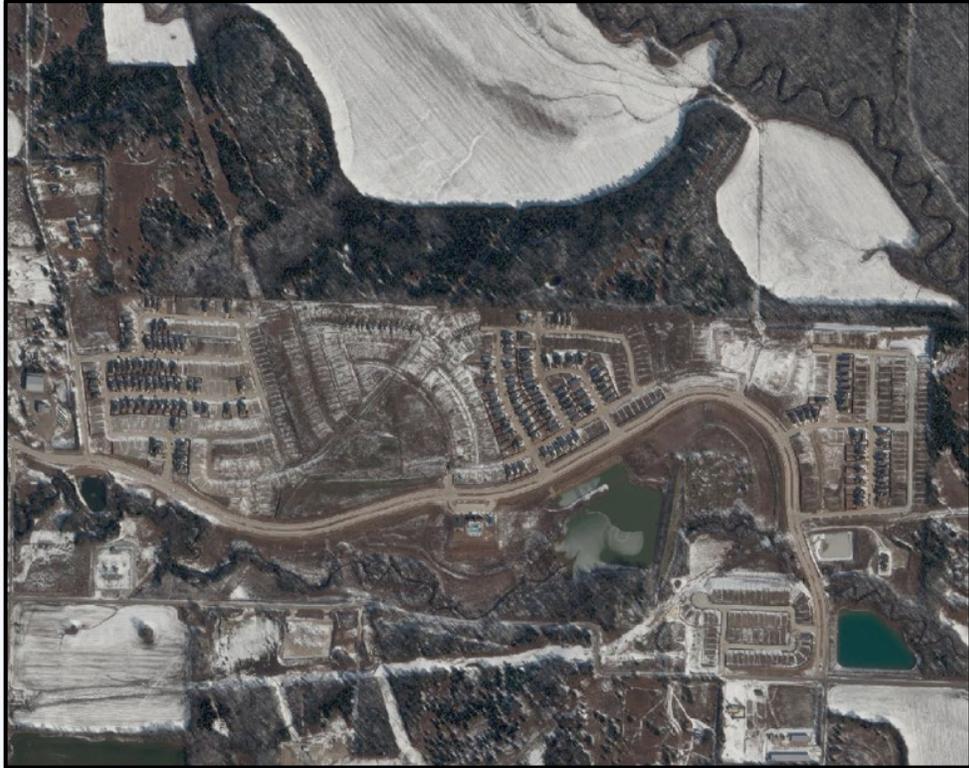
January 2026



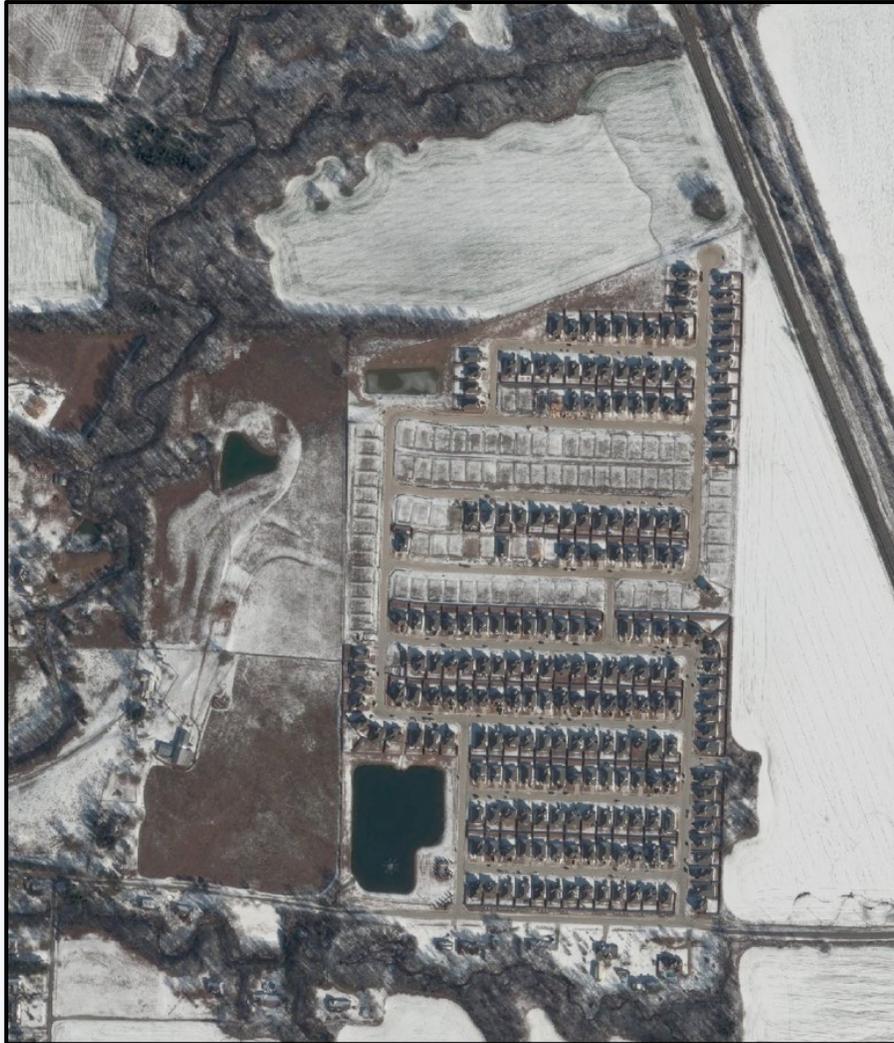
Mantua Point

- 2,800 total lots
- 2,253 future lots
- 70 vacant developed lots
- 10 homes under construction
- 435 occupied homes
- Ph 3A (279 lots) and 3B (201 lots) groundwork underway
- Risland Homes, David Weekley Homes, Highland Homes
- \$366K - \$707K

January 2026



January 2026



Rolling Ridge

- 373 total lots
- 64 future lots
- 94 vacant developed lots
- 20 homes under construction
- 189 occupied homes
- Manors section (64 lots) preliminary plat approved
- Cambridge Homes, K. Hovnanian Homes
- \$345K - \$403K



January 2026



Thompson Farms

- 395 total lots
- 82 vacant developed lots
- 6 inventory homes
- 307 occupied homes
- Ph 3 (78 lots) delivered summer 2025
- DRB Homes, Gehan Homes, Highland Homes
- \$560K - \$617K

January 2026



River Ranch

- 191 total lots
- 66 future lots
- 87 vacant developed lots
- 16 homes under construction
- 11 homes occupied
- Stonehollow Homes, Pacesetter Homes, Windsor Homes
- \$369K - \$651K



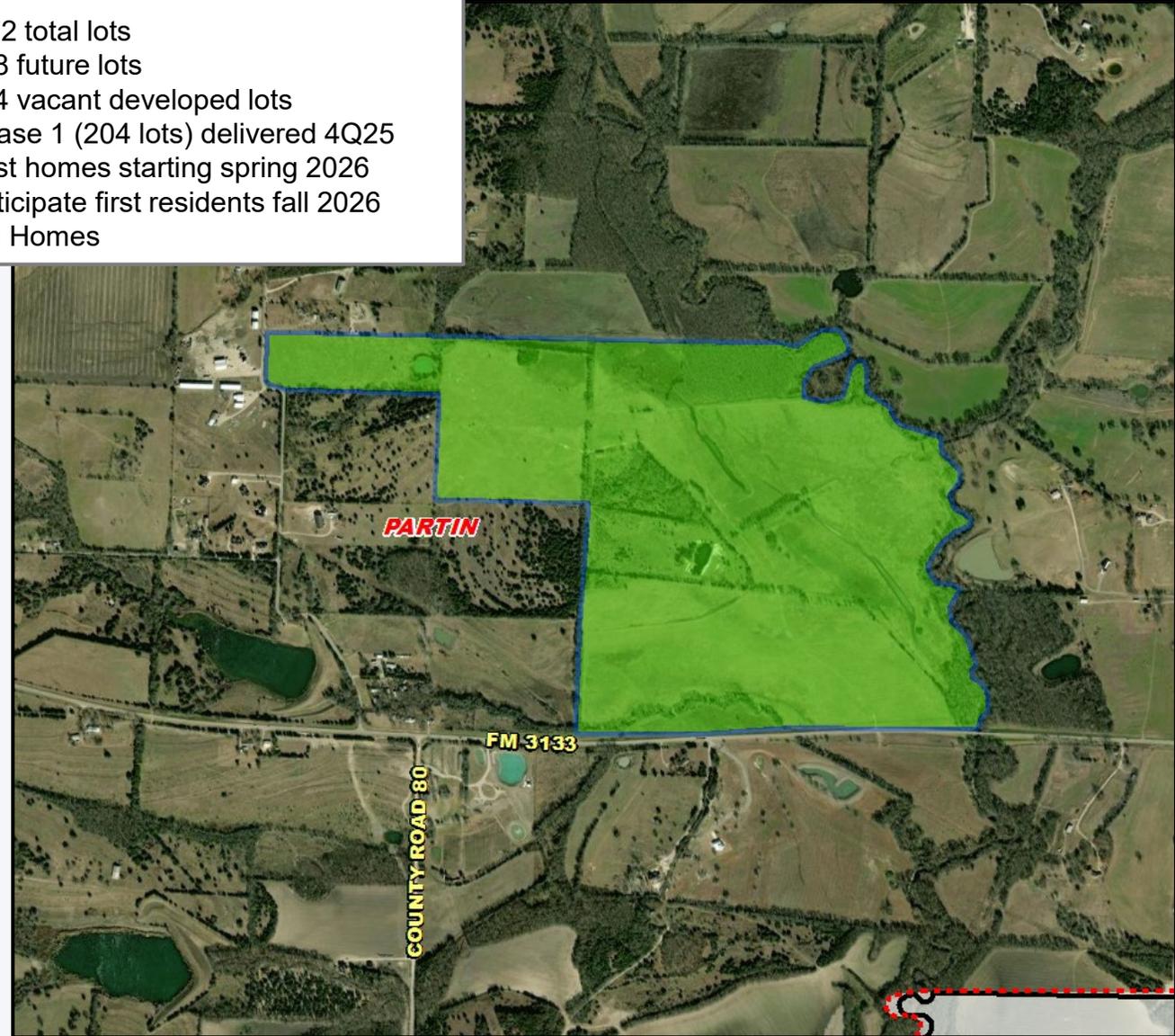
January 2026



October 2025



- ### Oak Lawn
- 772 total lots
 - 568 future lots
 - 204 vacant developed lots
 - Phase 1 (204 lots) delivered 4Q25
 - First homes starting spring 2026
 - Anticipate first residents fall 2026
 - M/I Homes



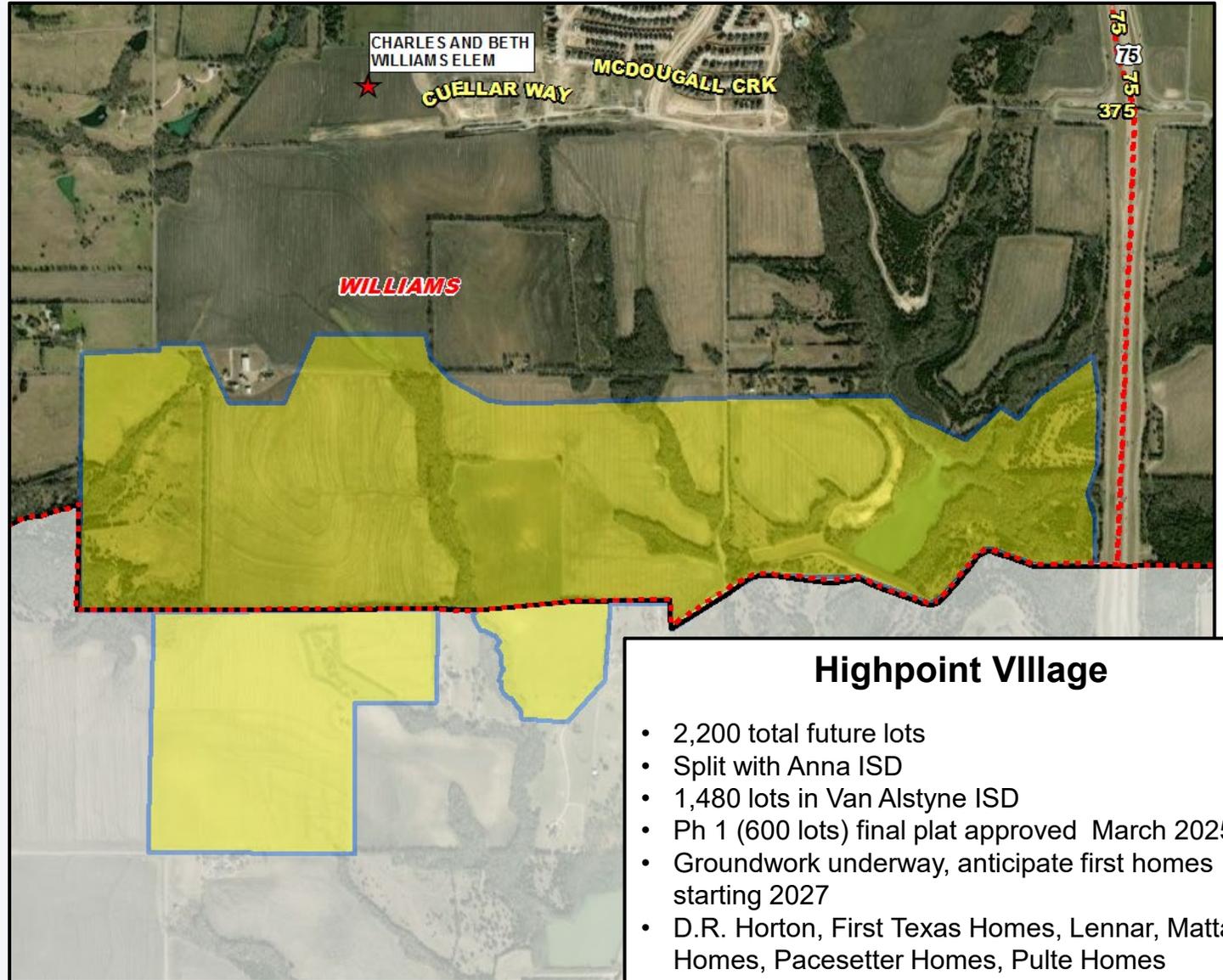
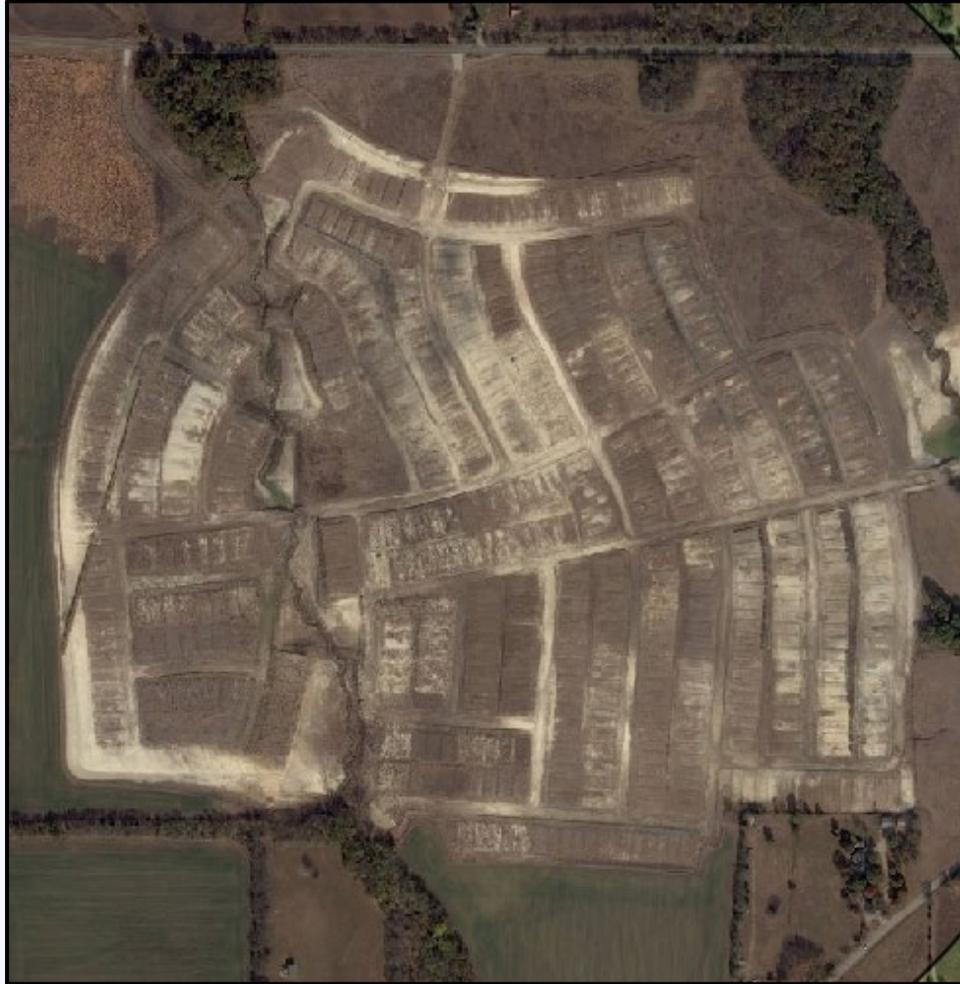
October 2025



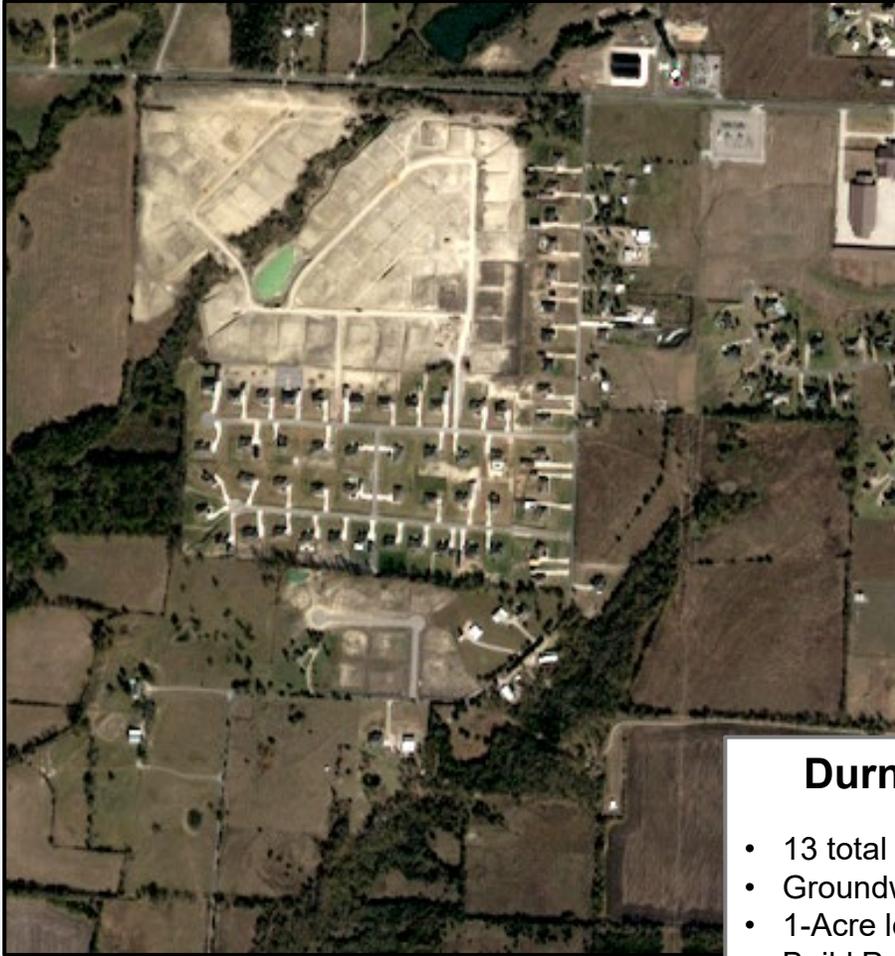
Panther Trails

- 82 total lots
- Lots delivered 4Q25
- Anticipate first homes starting spring 2026
- First residents anticipated fall 2026

November 2025

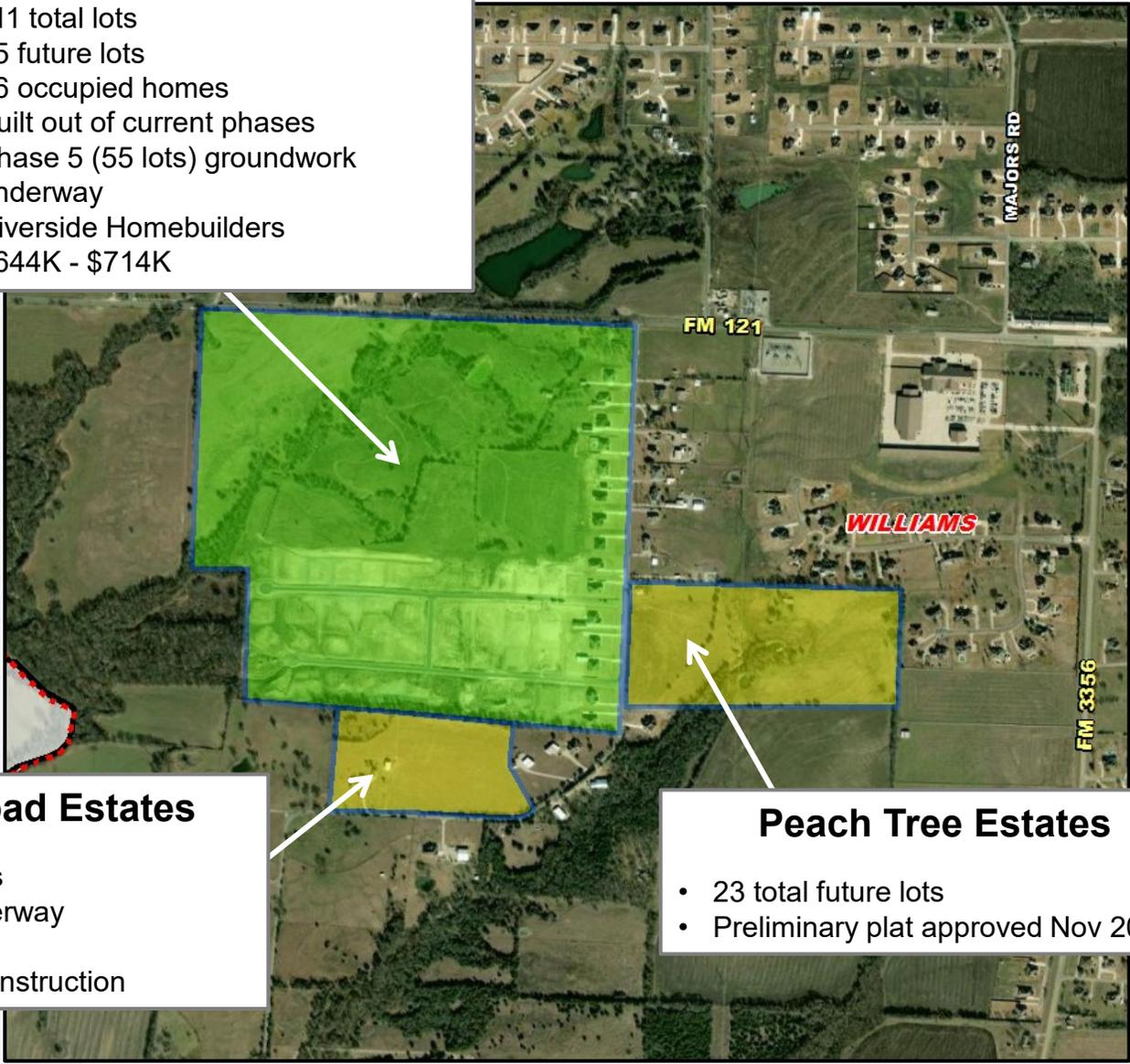


November 2025



Saddle Brook

- 111 total lots
- 55 future lots
- 56 occupied homes
- Built out of current phases
- Phase 5 (55 lots) groundwork underway
- Riverside Homebuilders
- \$644K - \$714K



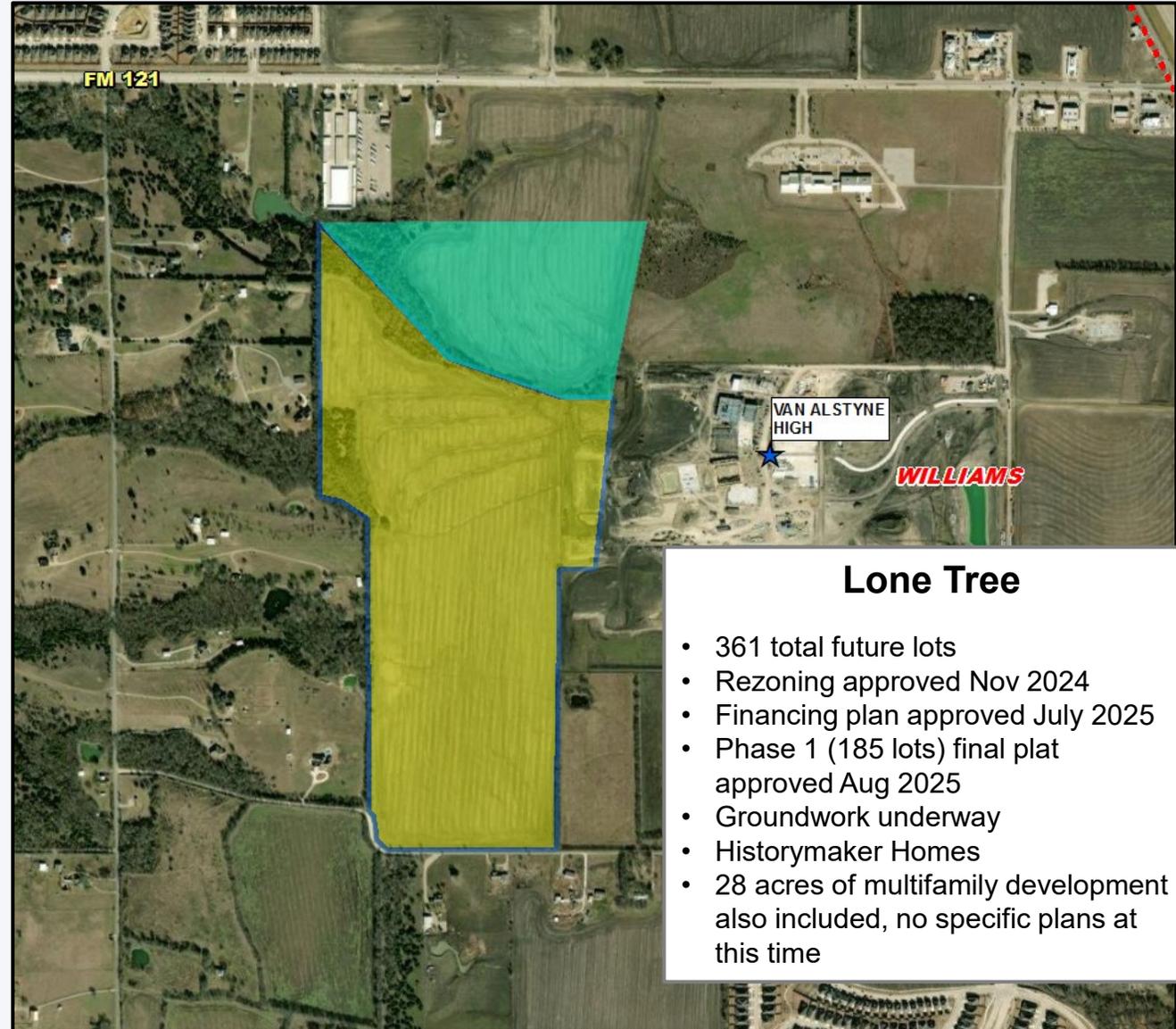
Durning Road Estates

- 13 total future lots
- Groundwork underway
- 1-Acre lots
- Build Paragon Construction

Peach Tree Estates

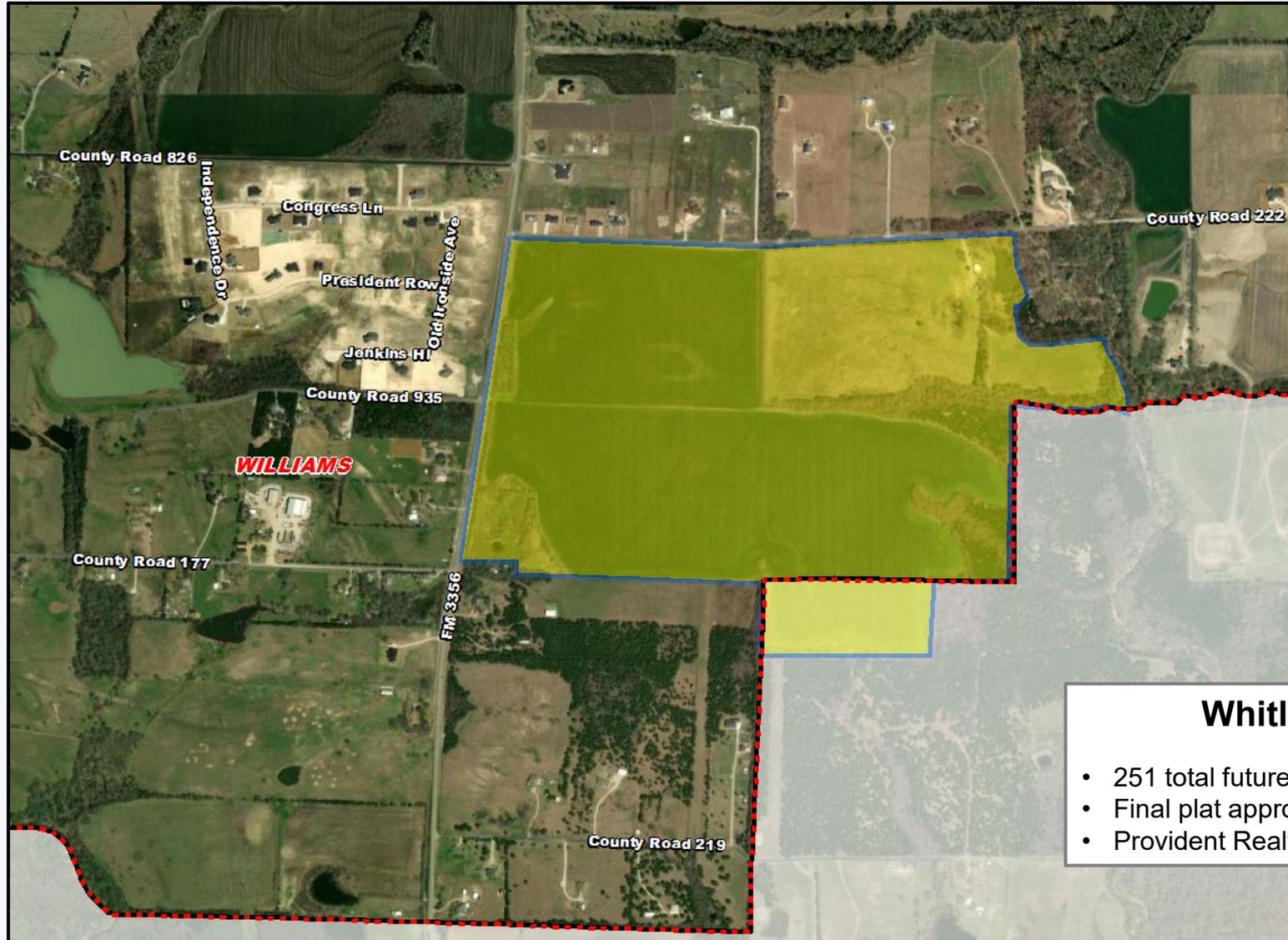
- 23 total future lots
- Preliminary plat approved Nov 2025

October 2025



Lone Tree

- 361 total future lots
- Rezoning approved Nov 2024
- Financing plan approved July 2025
- Phase 1 (185 lots) final plat approved Aug 2025
- Groundwork underway
- Historymaker Homes
- 28 acres of multifamily development also included, no specific plans at this time

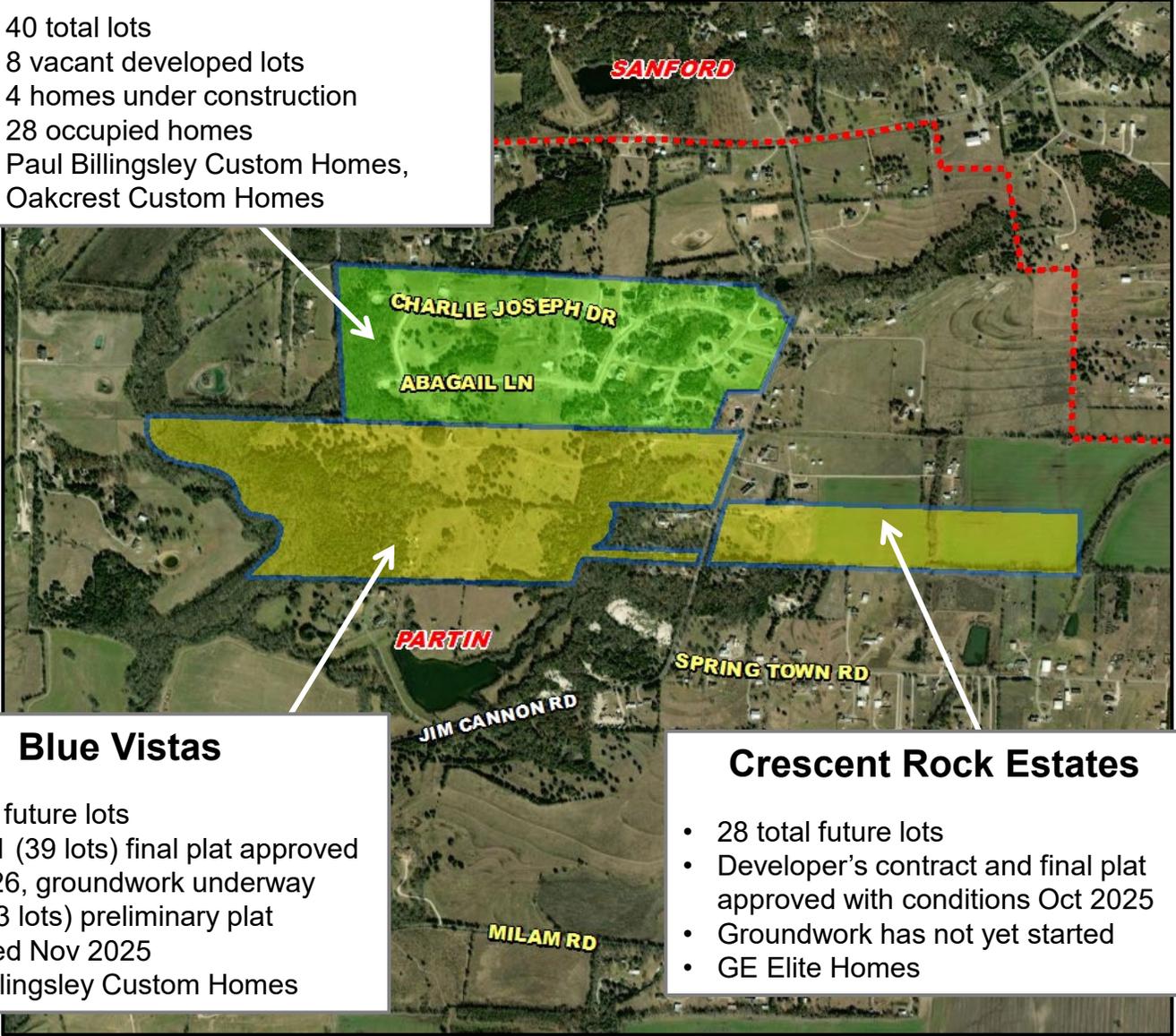


October 2026



Blue Hills of Van Alstyne

- 40 total lots
- 8 vacant developed lots
- 4 homes under construction
- 28 occupied homes
- Paul Billingsley Custom Homes, Oakcrest Custom Homes

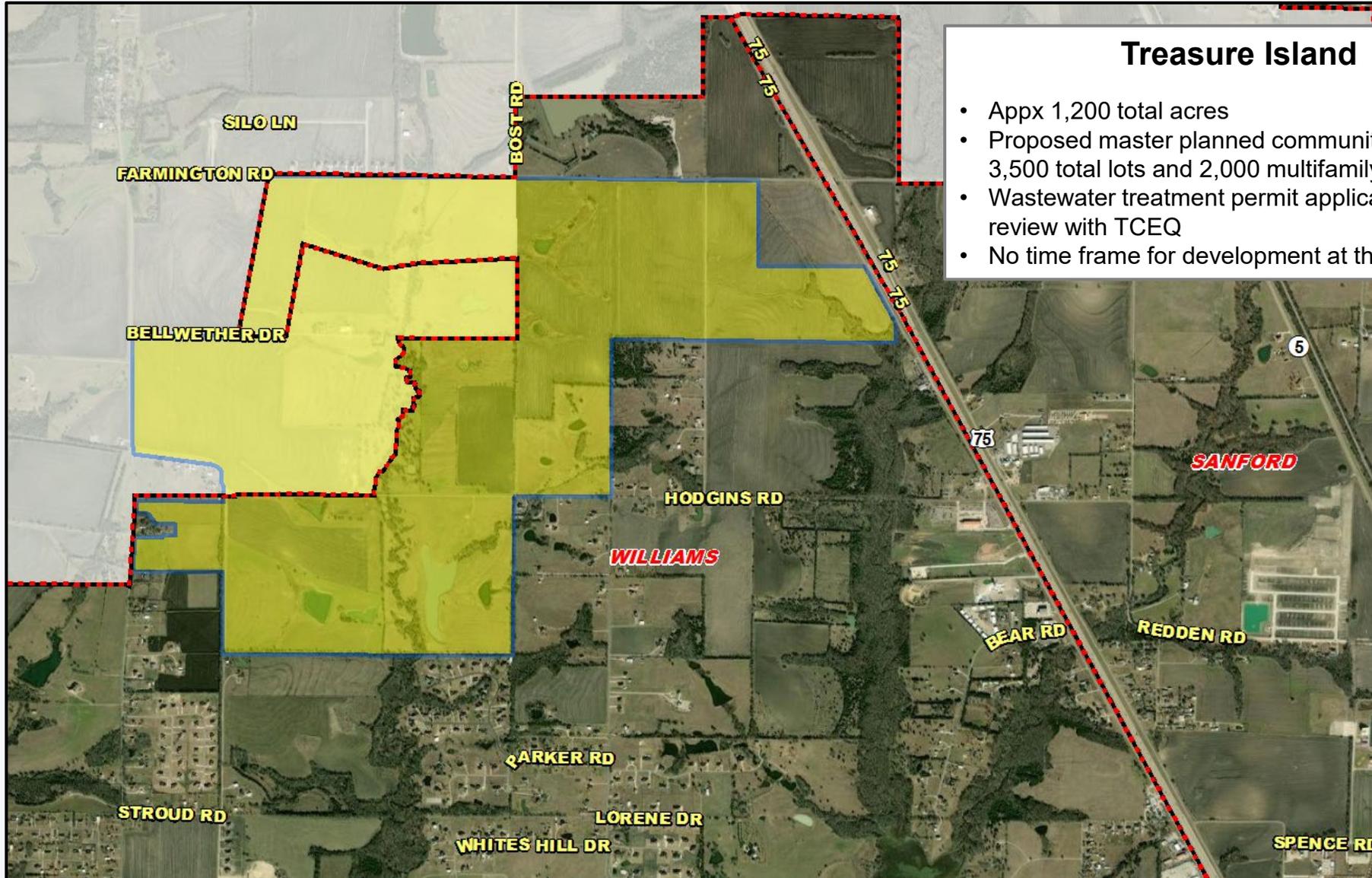


Blue Vistas

- 72 total future lots
- Phase 1 (39 lots) final plat approved Jan 2026, groundwork underway
- Ph 2 (33 lots) preliminary plat approved Nov 2025
- Paul Billingsley Custom Homes

Crescent Rock Estates

- 28 total future lots
- Developer's contract and final plat approved with conditions Oct 2025
- Groundwork has not yet started
- GE Elite Homes



Treasure Island

- Appx 1,200 total acres
- Proposed master planned community with appx. 3,500 total lots and 2,000 multifamily units
- Wastewater treatment permit application under review with TCEQ
- No time frame for development at this time

Multifamily Housing

Regional Market and District Data





Student Yield – The number of students enrolled in school divided by the total number of housing units being evaluated in a specific area.

The average yield within the overall District is approximately .026. The type of units were evaluated related to age of unit, size of unit, and cost of unit as it relates student yield numbers.

**Senior Living units excluded*

Total Multifamily Student Yield Analysis –

Total Number of Apartment Units included in Market Study	Number of Students Enrolled in school in the Apartment Units	Yield
308 Units	8 Students	0.026

Age of Apartment Building & Yield –

1983 - 2010	2010 - Current
0.000	0.034

Enrollment Forecast

10 Year Forecast & Campus Projections

GRADE LEVEL ENROLLMENT HISTORY

Year	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	Total %
2021/22	4	29	148	169	159	159	149	160	156	175	176	153	143	151	126	2,057	189	10.1%
2022/23	18	20	177	169	183	190	186	171	178	177	184	187	157	144	144	2,285	228	11.1%
2023/24	21	20	184	176	192	192	185	200	191	194	191	191	189	148	144	2,418	133	5.8%
2024/25	22	26	177	200	193	216	211	207	226	202	203	201	194	184	150	2,612	194	8.0%
2025/26	21	33	230	210	217	223	233	220	237	245	213	226	213	187	191	2,899	287	11.0%

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

GRADE LEVEL COHORT HISTORY

Year	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	ELEM	MID	HIGH
Prev 3 yr avg	1.056	1.190	1.100	1.089	1.106	1.110	1.050	1.079	1.131	1.077	1.060	1.068	1.029	0.960	1.017	1.089	1.089	1.018
2022/23	4.500	0.690	1.196	1.142	1.083	1.195	1.170	1.148	1.113	1.135	1.051	1.063	1.026	1.007	0.954	1.156	1.100	1.012
2023/24	1.167	1.000	1.040	0.994	1.136	1.049	0.974	1.075	1.117	1.090	1.079	1.038	1.011	0.943	1.000	1.045	1.095	0.998
2024/25	1.048	1.300	0.962	1.087	1.097	1.125	1.099	1.119	1.130	1.058	1.046	1.052	1.016	0.974	1.014	1.081	1.078	1.014
2025/26	0.955	1.269	1.299	1.186	1.085	1.155	1.079	1.043	1.145	1.084	1.054	1.113	1.060	0.964	1.038	1.141	1.094	1.044

- The highest cohort occurred in Kindergarten
- Additional grades with higher cohorts include Pre-K, 1st, and 3rd grades

Year (OCT)	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	Total %
2021/22	4	29	148	169	159	159	149	160	156	175	176	153	143	151	126	2,057		
2022/23	18	20	177	169	183	190	186	171	178	177	184	187	157	144	144	2,285	228	11.1%
2023/24	21	20	184	176	192	192	185	200	191	194	191	191	189	148	144	2,418	133	5.8%
2024/25	22	26	177	200	193	216	211	207	226	202	203	201	194	184	150	2,612	194	8.0%
2025/26	21	33	230	210	217	223	233	220	237	245	213	226	213	187	191	2,899	287	11.0%
2026/27	21	34	245	250	230	237	244	268	246	255	260	225	232	204	190	3,141	242	8.3%
2027/28	21	34	267	267	273	250	258	281	300	264	269	279	233	224	207	3,427	286	9.1%
2028/29	21	34	297	290	296	303	277	297	315	323	279	291	290	224	228	3,765	338	9.9%
2029/30	21	34	321	323	314	321	329	319	333	339	341	298	301	279	228	4,101	336	8.9%
2030/31	21	34	348	348	351	340	348	378	357	358	358	365	309	290	283	4,488	387	9.4%
2031/32	21	34	370	368	368	371	358	400	423	384	378	384	379	298	295	4,831	343	7.6%
2032/33	21	34	392	392	390	390	393	412	448	455	405	405	398	365	303	5,203	372	7.7%
2033/34	21	34	414	414	414	412	412	432	461	482	480	434	420	384	370	5,584	381	7.3%
2034/35	21	34	431	431	431	431	429	439	475	496	509	515	450	405	390	5,887	303	5.4%
2035/36	21	34	450	450	450	450	450	457	483	511	524	545	534	434	411	6,204	317	5.4%

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

CAMPUS	Capacity	History	Fall	ENROLLMENT PROJECTIONS									
		2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36
PARTIN ELEMENTARY SCHOOL	675	483	401	427	465	533	608	675	711	757	809	811	813
SANFORD ELEMENTARY SCHOOL	800	562	496	538	581	626	650	660	662	668	665	680	695
WILLIAMS ELEMENTARY SCHOOL	800		270	296	324	359	405	455	517	587	647	717	797
ELEMENTARY TOTALS	2,275	1,045	1,167	1,261	1,370	1,518	1,663	1,790	1,890	2,012	2,121	2,208	2,305
Elementary Absolute Change		-125	122	94	109	148	145	127	100	122	109	87	97
Elementary Percent Change		-10.68%	11.67%	8.05%	8.64%	10.80%	9.55%	7.64%	5.59%	6.46%	5.42%	4.10%	4.39%
VAN ALSTYNE MIDDLE SCHOOL	675	433	457	514	581	612	652	735	823	860	893	914	940
VAN ALSTYNE JUNIOR HIGH	800	405	458	515	533	602	680	716	762	860	962	1,005	1,035
MIDDLE SCHOOL TOTALS	1,475	838	915	1,029	1,114	1,214	1,332	1,451	1,585	1,720	1,855	1,919	1,975
Middle School Absolute Change		262	77	114	85	100	118	119	134	135	135	64	56
Middle School Percent Change		45.49%	9.19%	12.46%	8.26%	8.98%	9.72%	8.93%	9.24%	8.52%	7.85%	3.45%	2.92%
VAN ALSTYNE HIGH SCHOOL	1,100	729	817	851	943	1,033	1,106	1,247	1,356	1,471	1,608	1,760	1,924
HIGH SCHOOL TOTALS	1,100	729	817	851	943	1,033	1,106	1,247	1,356	1,471	1,608	1,760	1,924
High School Absolute Change		57	88	34	92	90	73	141	109	115	137	152	164
High School Percent Change		8.48%	12.07%	4.16%	10.81%	9.54%	7.07%	12.75%	8.74%	8.48%	9.31%	9.45%	9.32%
DISTRICT TOTAL		2,612	2,899	3,141	3,427	3,765	4,101	4,488	4,831	5,203	5,584	5,887	6,204
District Absolute Change		194	287	242	286	338	336	387	343	372	381	303	317
District Percent Change		8.02%	10.99%	8.35%	9.11%	9.86%	8.92%	9.44%	7.64%	7.70%	7.32%	5.43%	5.38%

Green = w/in 5% of Capacity; Yellow = Over Capacity



District Information -



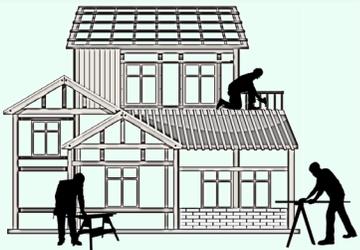
Van Alstyne ISD Enrollment increased by 842 over the last four years. The District has seen enrollment grow this new 2025-26 school year by approximately 290 students.

Housing Market Conditions -



New home closings in VAISD outpaced new home starts in 2025, following a surge in starts in 2024, and reflecting a tempered pace by builders in response to increased construction costs and economic uncertainty.

Housing Activity & Future Developments -



The district currently has approximately 230 homes in active inventory, 1,230 lots available to build on, and nearly 10,250 planned in the future.

Enrollment Forecast -



Enrollment is forecasted to reach nearly 4,500 students in 5 years and with additional housing activity and population growth could surpass 6,200 by the 2035-36 school year.