

Demographic Analysis and Enrollment Projections

Draft Report

April 18, 2023



APPLIED ECONOMICS

Scope of Study

Enrollment Trends

- Total and grade level characteristics
- Geographic distribution
- Alternative providers

Demographic Characteristics

- Population characteristics
- Household tenure and age structure
- Housing supply and occupancy rates

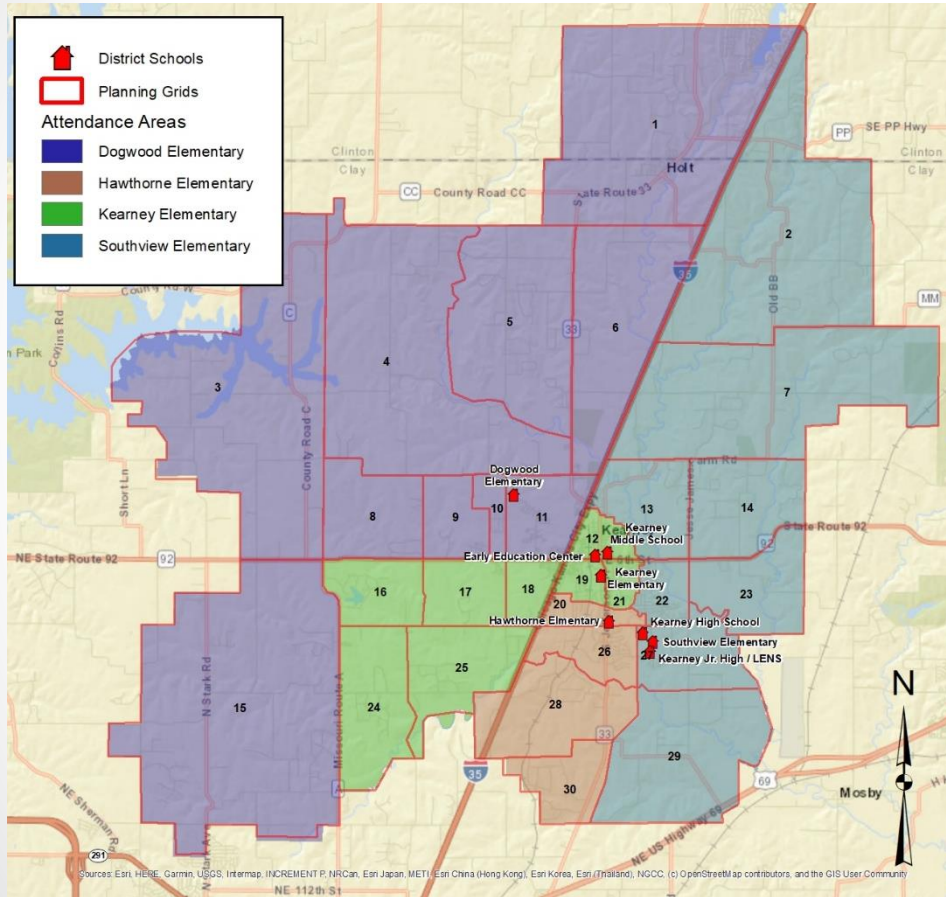
Residential Development Impacts

- Current development activity
- Housing market conditions
- Future development potential

Enrollment Projections

- District
- Sub-District

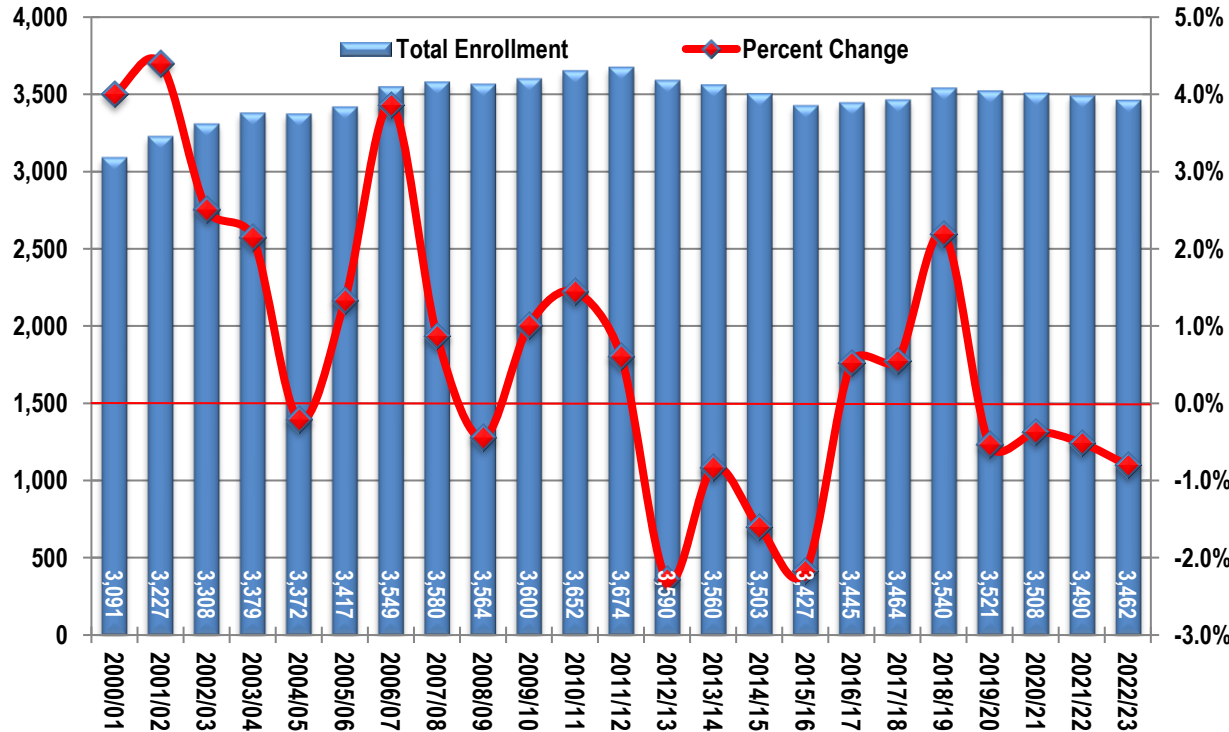
Sub-District Planning Areas



To facilitate facility and attendance area planning, the District is divided into 30 sub-district planning areas, herein referred to as “grids.”

Unlike school attendance areas, grids remain unchanged over time, providing a consistent basis for sub-District enrollment projections.

Enrollment Trends



Source: Kearney School District.

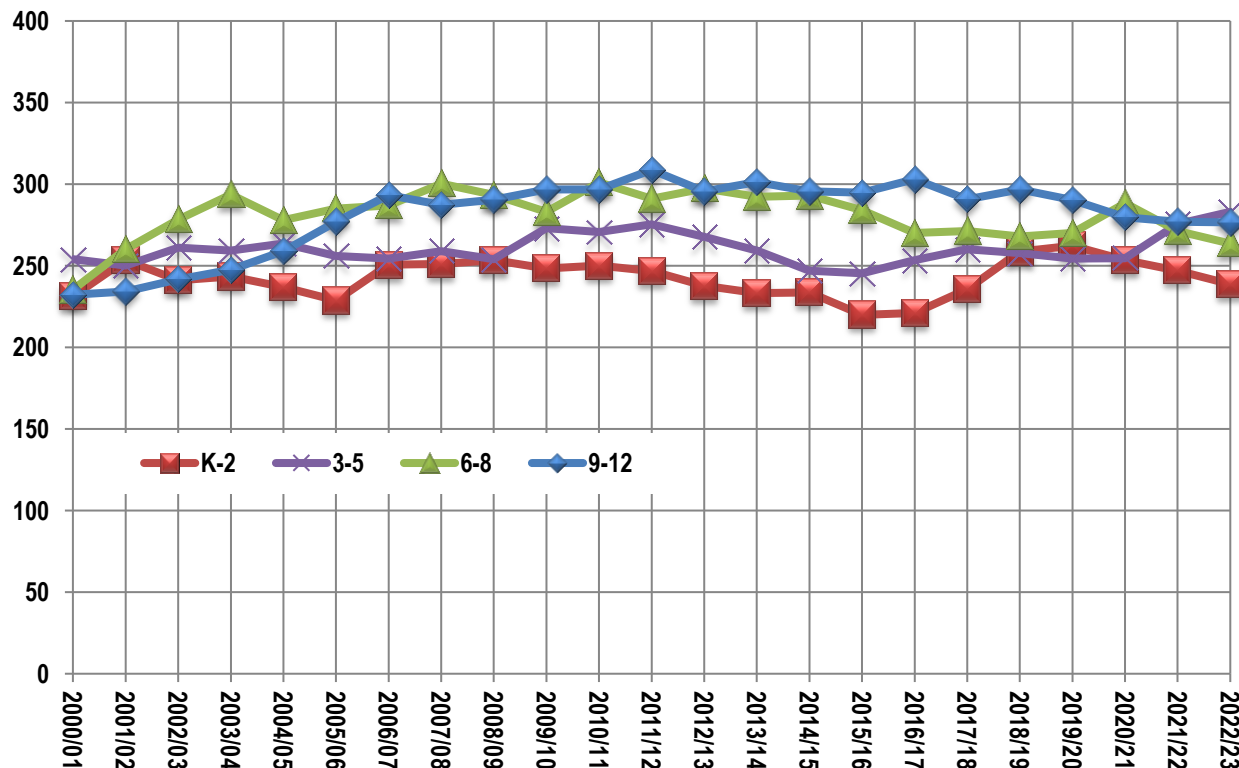
District enrollment grew at a moderate and consistent rate during the 2000's, increasing by about 600 students (19%) and about 1,400 new housing units.

From 2010 through 2015, enrollment declined as construction slowed dramatically, and lower birth rates started to impact elementary enrollment.

The same pattern is repeating itself now as new residential projects have been slow to get underway and market conditions weaken.

Enrollment Characteristics

Average Enrollment Per Grade



High school enrollment had consistently been the largest group since 2006/07, but in the last two years, the 3-5 grade group has spiked, an echo of the K-2 increases from 2015 through 2019.

Enrollment in the K-2 group surged during the peak of the last housing cycle, but has slowly retreated as prices and interest rates have excluded many young home buyers.

Source: Kearney School District; Applied Economics, 2023.

Legend:

- Current Students (Yellow dot)
- District Schools (Red outline)
- Planning Grids (Red outline)

Attendance Areas:

- Dogwood Elementary (Purple)
- Hawthorne Elementary (Brown)
- Kearney Elementary (Green)
- Southview Elementary (Blue)

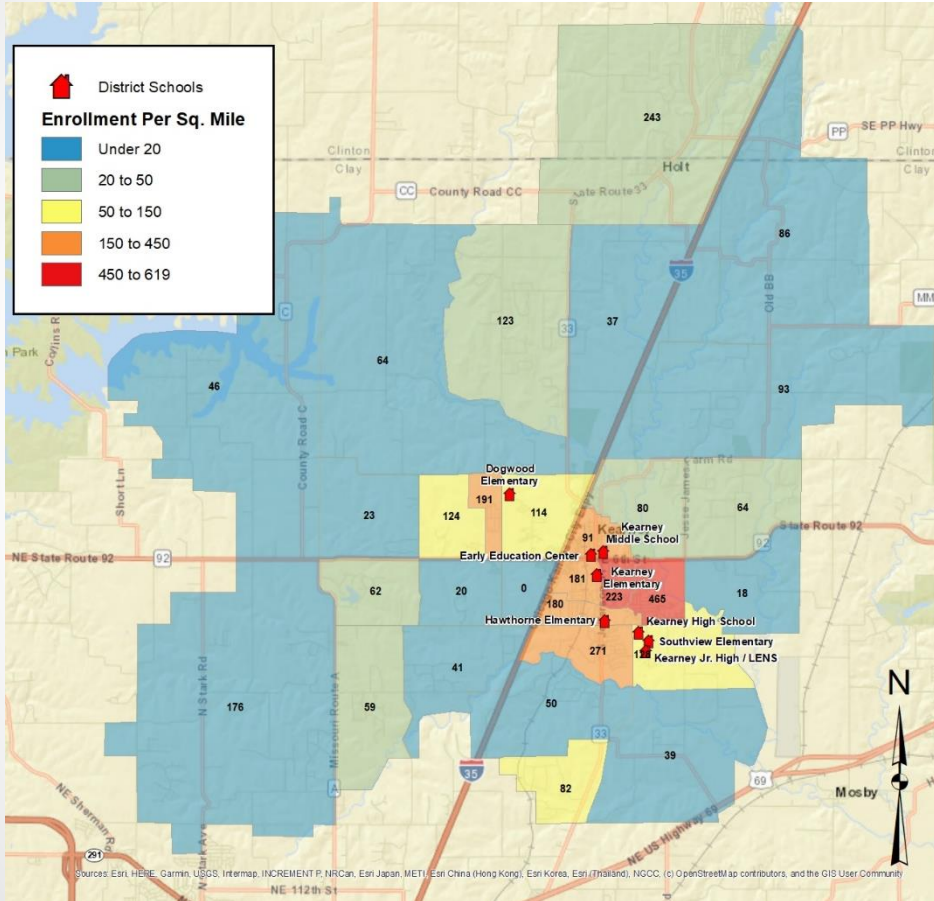
Map Labels: Hart, Dogwood Elementary, Early Education Center, Kearney Middle School, Kearney Elementary, Kearney High School, Southview Elementary, Kearney Jr. High / LENS, County Road CC, NE State Route 92, NE US Highway 99, Mosby, NE 112th St.

Grid Numbers: 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30.

A slim majority of current students (53%), are located in the District quadrant east of I-35 and south of State Route 92.

Outside the developed portions of the City of Kearney, and near the community of Holt, students are scattered across a large area making both facility and attendance area planning difficult.

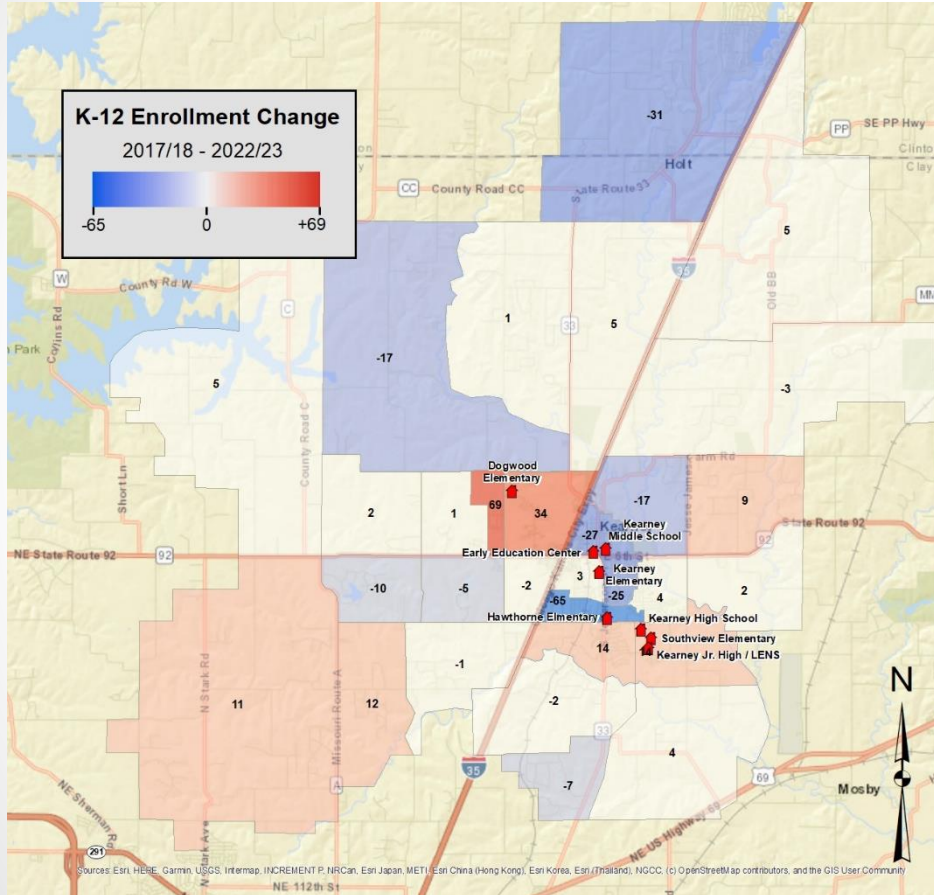
Current Enrollment by Grid



Student data aggregated by grid shows relatively high enrollment density in the City of Kearney, but lower density elsewhere.

The total count of current K-12 students by grid is shown on this map, but data was collected by grade for 2017/18 through 2022/23 for use in the projection model, and for facility and attendance area planning.

Change in Enrollment: 2017/18 to 2022/23



Despite almost no net change in total District enrollment during the past five years, the map shows a shift in enrollment from the area east of I-35, and from Holt, to the area northwest of I-35 and State Route 92 which has featured new homes affordable to families with children.

Demographic Trends

	Census	Census	Census	2000-10	2010-20
Population	14,275	17,877	20,104	2.3%	1.2%
Under 5	7.2%	5.5%	5.5%	-0.5%	1.2%
5 to 13	16.4%	14.5%	12.4%	1.0%	-0.4%
14 to 17	6.7%	7.8%	6.4%	3.9%	-0.8%
18 to 21	3.7%	4.1%	5.1%	3.4%	3.5%
22 to 54	47.6%	44.7%	41.5%	1.6%	0.4%
55 to 59	6.2%	6.4%	6.9%	2.5%	2.0%
60 to 74	8.8%	13.3%	15.8%	6.6%	3.0%
75 and up	3.4%	3.7%	6.3%	3.2%	6.7%
Housing Units	5,210	6,718	7,706	2.6%	1.4%
Single Family	86.0%	87.9%	88.0%	2.8%	1.4%
Multifamily	14.0%	12.1%	12.0%	1.1%	1.3%
Households	4,975	6,403	7,386	2.6%	1.4%
15 to 24	2.5%	1.6%	0.6%	-2.0%	-8.6%
25 to 34	17.9%	11.4%	13.0%	-2.0%	2.8%
35 to 44	27.2%	21.6%	16.6%	0.2%	-1.2%
45 to 54	20.2%	26.6%	21.6%	5.4%	-0.7%
55 to 64	19.1%	18.9%	19.5%	2.4%	1.8%
65 to 74	7.8%	12.6%	19.6%	7.5%	6.1%
Over 75	5.2%	7.4%	9.1%	6.1%	3.6%
Population Per	2.87	2.79	2.72	-0.27%	-0.25%

Sources: U.S. Bureau of the Census, 2000, 2010 and 2020; American Community Survey, 2022; Applied Economics, 2023.

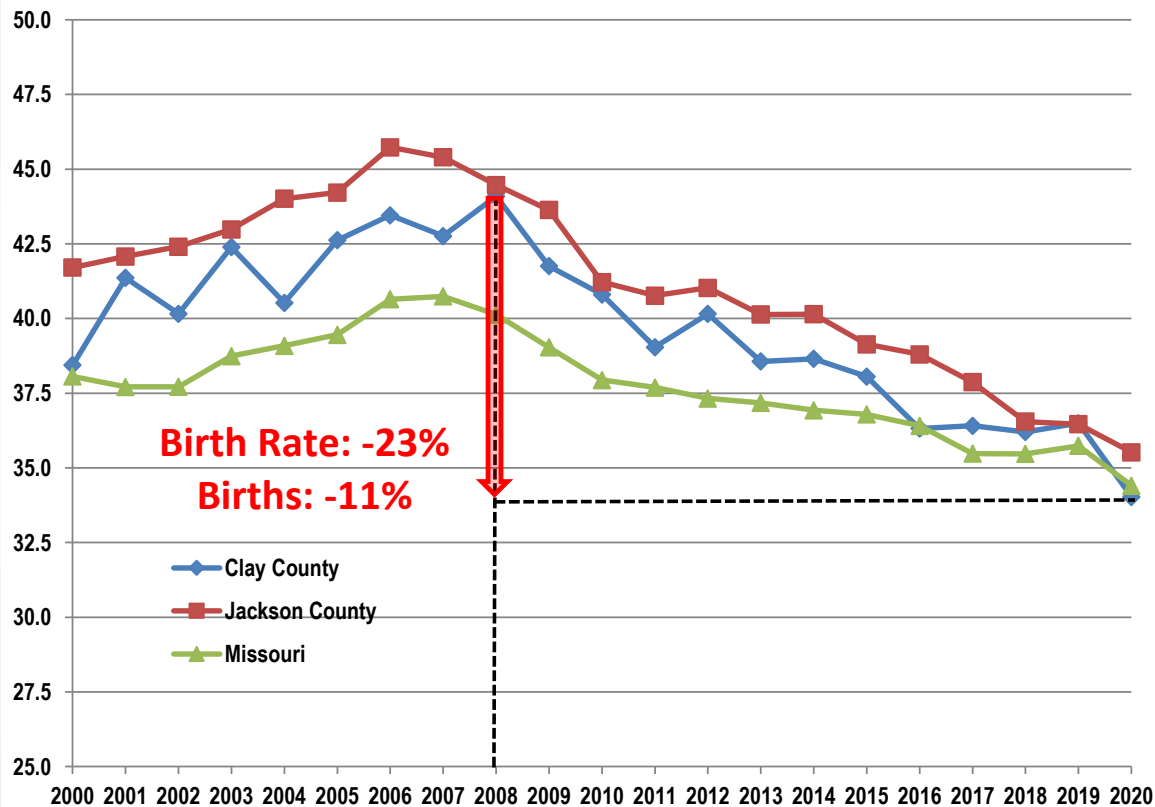
* Annual compound rate of change.

Population and housing continues to grow, albeit at a very modest rate compared to the 2000's.

The share of the population under 18 years is still large, but is declining, with a notable shift toward the older age cohorts now evident.

The age distribution of householders has shifted away from the child-bearing cohorts, but the rate of the shift appears to be declining.

Birthrates: Live Births per 1,000 People Aged 15 to 39

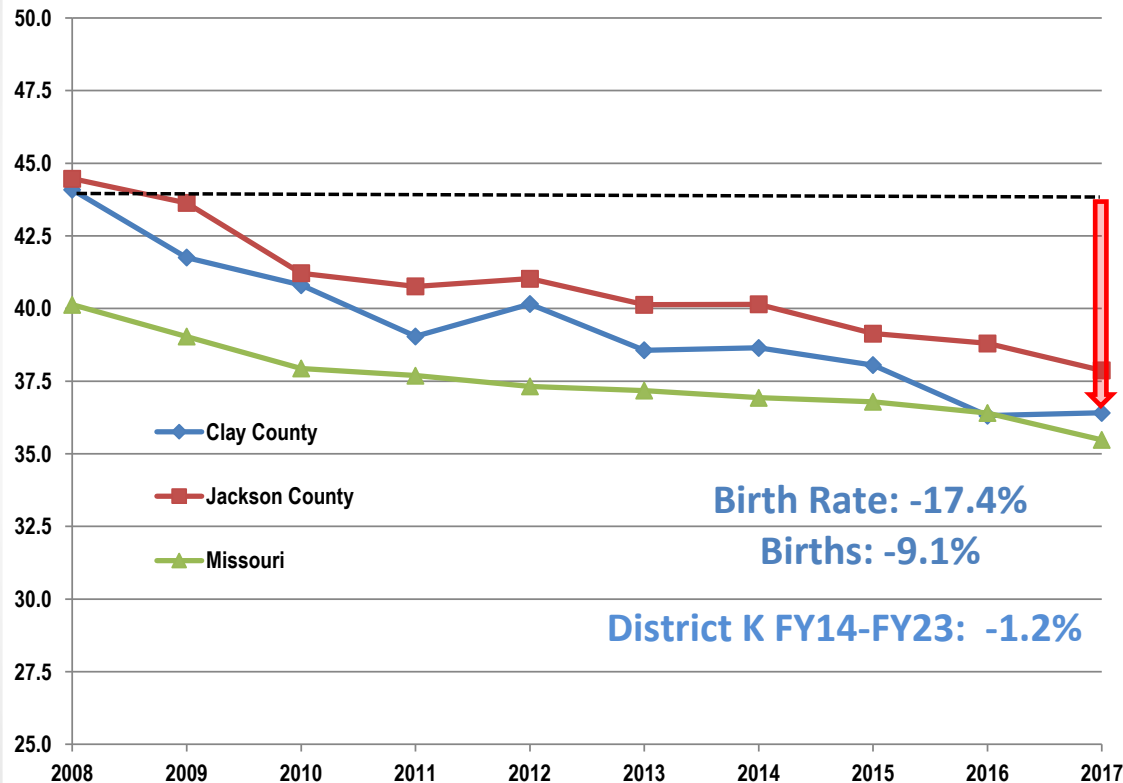


Sources: Missouri Department of Health and Senior Services, Missouri Information for Community Assessment. Missouri Census Data Center. (2021). *Population Estimates by Age*.

Birth rates in Clay County have declined by about 23% since the start of the Great Recession, resulting in an 11% decline in the number of births since 2008.

While birth rates have continued to fall, the number of births in Clay County was fairly stable between 2016 and 2019, but dropped sharply again in 2020.

Birthrates: Live Births per 1,000 People Aged 15 to 39



Sources: Missouri Department of Health and Senior Services, Missouri Information for Community Assessment. Missouri Census Data Center. (2021). *Population Estimates by Age*.

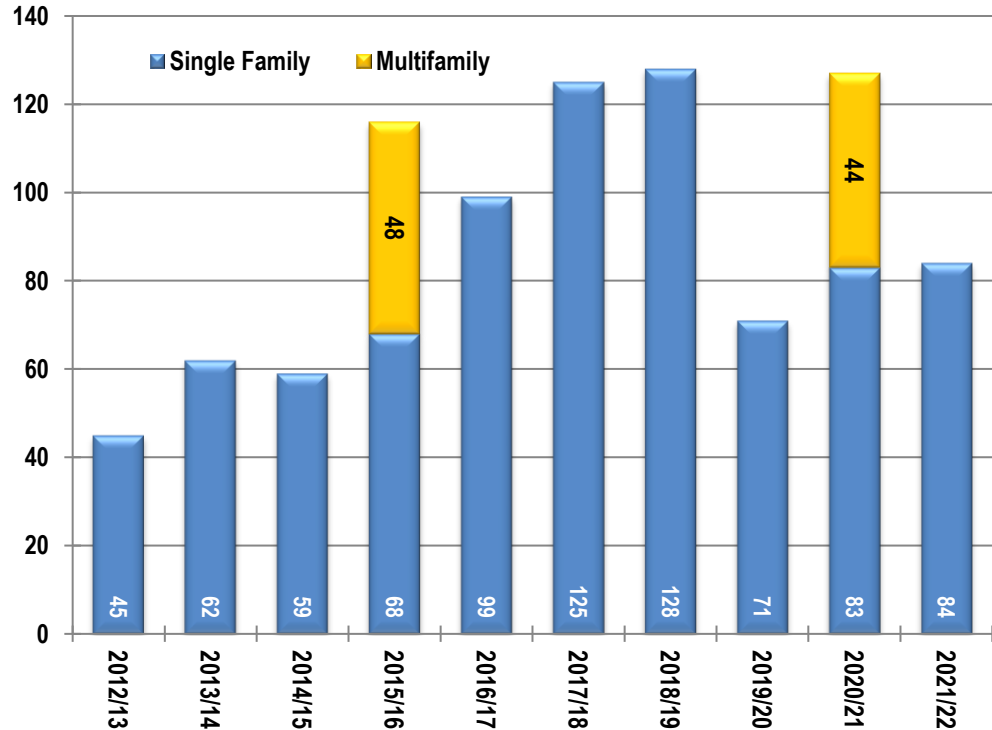
Birth rates in Clay County declined by 17.4% between 2008 and 2017, with a corresponding decline of 9.1% in the number of births.

The impact on Kearney Schools has been mitigated by growth until recently, with lagged Kindergarten enrollment for the period declining by only 1.2%.

Residential Development

About 900 housing units have been added in the District over the last 10 years; all but 92 were single family residences.

The increase in single family home construction from 2015 through 2018 substantially exhausted the ready supply of lots, causing the rate of construction to fall sharply, but it has now stabilized due to small projects and widespread rural development.

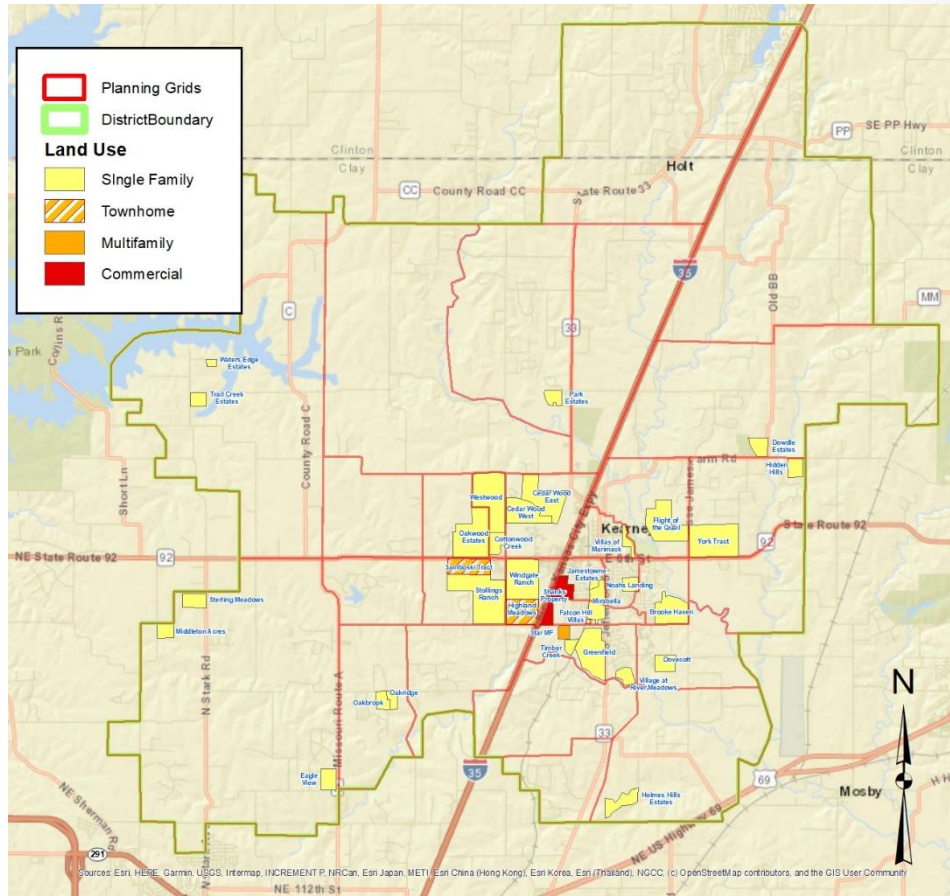


Source: City of Kearney; Clay County; Landmarketing; Applied Economics, 2023.

Development Potential

The residential development potential of known projects and vacant land that could begin development during the next ten years totals roughly 4,600 units, including about 750 units that remain in active projects.

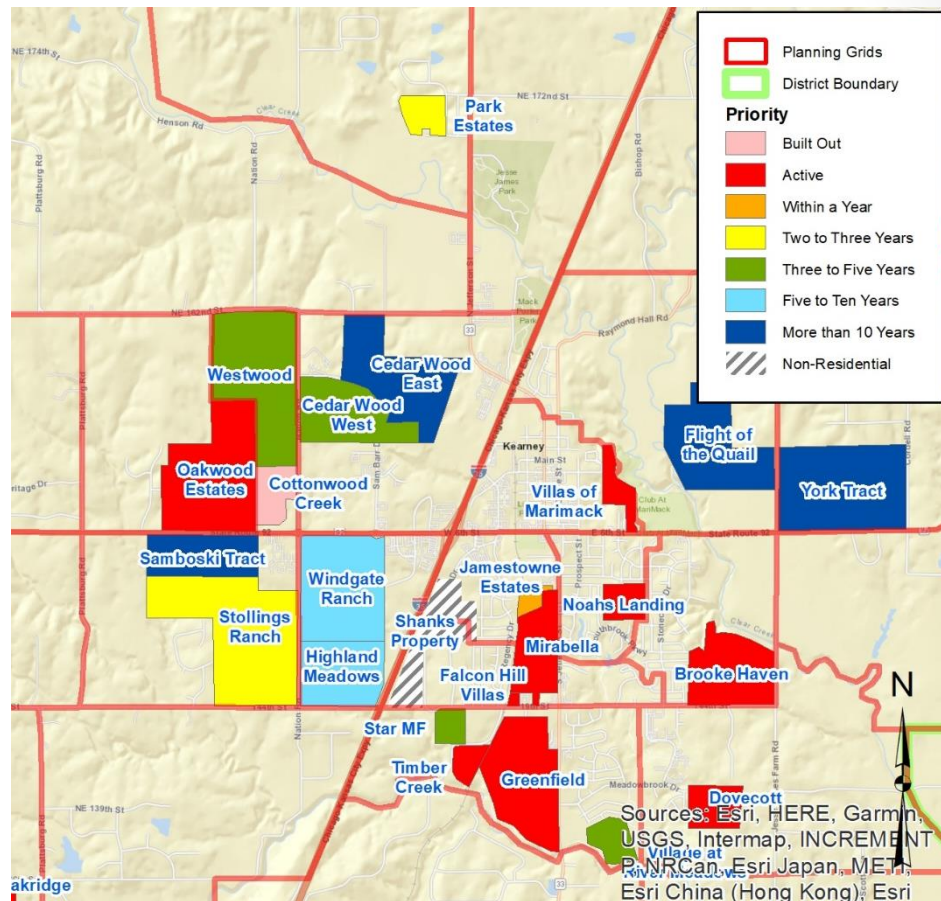
The near-term potential is in active development projects like Greenfield, Noah's Landing and Dovecott, with Stollings Ranch likely to be the next large project to get underway.



Development Timing

Other than Stollings Ranch, Westwood is the most likely project to have new housing units in the next five years, as well as perhaps Cedar Wood West, River Meadows and a multifamily project near the new I-35 interchange.

The majority of the potential new housing units are single family, however more multifamily projects are expected to emerge.



Projections: Housing and Population

Year	Population	Housing	New Units			Occupancy	Households		Pop/HH
		Units	Total	SF	MF	Rate	Total	Change	
2010/11	17,877	6,718	111	51	60	95.3%	6,403	103	2.792
2011/12	17,735	6,784	66	66	0	93.9%	6,370	-33	2.784
2012/13	17,733	6,822	38	38	0	93.7%	6,391	21	2.775
2013/14	17,787	6,880	57	57	0	93.5%	6,429	38	2.767
2014/15	17,902	6,958	79	79	0	93.2%	6,488	58	2.759
2015/16	18,235	7,033	75	75	0	94.2%	6,626	138	2.752
2016/17	18,558	7,168	134	86	48	94.5%	6,776	150	2.739
2017/18	18,919	7,294	126	126	0	94.9%	6,919	143	2.734
2018/19	19,378	7,453	159	159	0	95.2%	7,094	175	2.731
2019/20	19,849	7,616	163	163	0	95.5%	7,274	180	2.729
2020/21	20,104	7,706	90	90	0	95.8%	7,386	112	2.722
2021/22	20,350	7,853	147	103	44	95.5%	7,500	114	2.713
2022/23	20,555	7,957	104	104	0	95.3%	7,583	83	2.711
2023/24	20,761	8,062	105	99	6	95.1%	7,667	84	2.708
2024/25	20,953	8,154	92	89	3	95.0%	7,746	79	2.705
2025/26	21,187	8,254	100	95	5	95.0%	7,841	95	2.702
2026/27	21,672	8,492	238	111	127	95.0%	8,067	226	2.686
2027/28	22,045	8,637	145	143	2	95.0%	8,205	138	2.687
2028/29	22,574	8,878	241	141	100	95.0%	8,434	229	2.676
2029/30	23,152	9,147	269	144	125	95.0%	8,690	256	2.664
2030/31	23,794	9,449	302	152	150	95.0%	8,977	287	2.651
2031/32	24,411	9,730	281	161	120	95.0%	9,244	267	2.641
2032/33	24,842	9,905	175	155	20	95.0%	9,410	166	2.640
2023/24 - 2032/33			1,948	1,290	658		1,827		

About 1,000 new housing units were added during the 2010's, increasing population by 2,500 people to a total of 20,104 people, according the 2020 Census.

Over 1,900 new homes are expected to be added over the next ten years; this will add about 4,400 new residents, with the growth being mostly in the second half of the projection period.

Sources: Land Marketing Inc., 2023; Applied Economics, 2023.

Bolding indicates historical estimates.

Projections: School-Age Population and Enrollment

Year	Households	School-Age Population *		K-12 Enrollment		Enrollment - Population Ratio
		Total	Per Household	Total	Per Household	
2010/11	6,403	3,991	0.623	3,652	0.570	0.915
2011/12	6,370	3,893	0.611	3,674	0.577	0.944
2012/13	6,391	3,829	0.599	3,590	0.562	0.938
2013/14	6,429	3,776	0.587	3,560	0.554	0.943
2014/15	6,488	3,736	0.576	3,503	0.540	0.938
2015/16	6,626	3,741	0.565	3,427	0.517	0.916
2016/17	6,776	3,750	0.554	3,445	0.508	0.919
2017/18	6,919	3,755	0.543	3,464	0.501	0.923
2018/19	7,094	3,774	0.532	3,540	0.499	0.938
2019/20	7,274	3,794	0.522	3,521	0.484	0.928
2020/21	7,386	3,777	0.511	3,508	0.475	0.929
2021/22	7,500	3,785	0.505	3,490	0.465	0.922
2022/23	7,583	3,778	0.498	3,462	0.457	0.916
2023/24	7,667	3,770	0.492	3,440	0.449	0.913
2024/25	7,746	3,759	0.485	3,433	0.443	0.913
2025/26	7,841	3,756	0.479	3,431	0.438	0.913
2026/27	8,067	3,814	0.473	3,466	0.430	0.909
2027/28	8,205	3,829	0.467	3,474	0.423	0.907
2028/29	8,434	3,884	0.461	3,559	0.422	0.916
2029/30	8,690	3,950	0.455	3,622	0.417	0.917
2030/31	8,977	4,027	0.449	3,668	0.409	0.911
2031/32	9,244	4,093	0.443	3,705	0.401	0.905
2032/33	9,410	4,113	0.437	3,731	0.396	0.907

Source: Applied Economics, 2023.

* Population age 5 through 17, corresponds with Kindergarten through 12th grade.

The school-age population per household has been declining rapidly since 2010/11, but the Enrollment – Population (E-P) ratio has been stable.

Current estimates show about 3,800 school-age persons living in the District, and total enrollment of about 3,500 students.

The school-age population per household is expected to continue to decline throughout the projection period.

Enrollment Projections

Year	Enrollment by Level				K-12 Enrollment	Change	
	K-5	6-7	8-9	10-12		Number	Percent
2010/11	1,562	586	618	886	3,652	52	1.4%
2011/12	1,566	597	593	918	3,674	22	0.6%
2012/13	1,516	567	601	906	3,590	-84	-2.3%
2013/14	1,478	599	612	871	3,560	-30	-0.8%
2014/15	1,442	571	589	901	3,503	-57	-1.6%
2015/16	1,396	544	610	877	3,427	-76	-2.2%
2016/17	1,423	534	588	900	3,445	18	0.5%
2017/18	1,487	531	569	877	3,464	19	0.6%
2018/19	1,549	524	575	892	3,540	76	2.2%
2019/20	1,550	552	544	875	3,521	-19	-0.5%
2020/21	1,524	584	561	839	3,508	-13	-0.4%
2021/22	1,568	528	559	835	3,490	-18	-0.5%
2022/23	1,565	500	571	826	3,462	-28	-0.8%
2023/24	1,537	559	533	811	3,440	-22	-0.6%
2024/25	1,500	592	510	831	3,433	-7	-0.2%
2025/26	1,473	589	570	799	3,431	-2	-0.1%
2026/27	1,487	564	613	802	3,466	35	1.0%
2027/28	1,505	538	614	817	3,474	8	0.2%
2028/29	1,534	540	588	897	3,559	85	2.4%
2029/30	1,571	552	566	933	3,622	63	1.8%
2030/31	1,615	561	570	922	3,668	46	1.3%
2031/32	1,665	567	582	891	3,705	37	1.0%
2032/33	1,701	573	587	870	3,731	26	0.7%

Between 2010/11 and 2017/18 enrollment fell by 0.7% per year, but it has been nearly unchanged since then.

The projections show enrollment continuing to decline over the next three years, as the impact of the aging of the population and reductions in the E-P ratio outweigh the impact of housing and population growth, before new developments again add to the size of the school-age population.

Source: Applied Economics, 2023.

Bolding indicates actuals.

K-12 Enrollment Change
2022/23 - 2027/28

-41 0 +78

Sources: Esri, HERE, Garmin, USGS, Infmap, INCREMENT P, NRCan, Esri Japan, METI, Esri China (Hong Kong), Esri Korea, Esri (Thailand), NGCC, (c) OpenStreetMap contributors, and the GIS User Community

All, or nearly all, of the enrollment impacts of development in this period are expected to be offset by the aging of the existing population.

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During the second half of the projection period the acceleration of Stollings Ranch, and the advance of Westwood and other projects, should result in net enrollment growth.

Attendance Area Projections

	Actual					Projected											Change		
Attendance Area	2017/18	2018/19	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2030/31	2031/32	2017-22	2022-27	2027-32	
Elementary (K-5):																			
Dogwood	460	512	509	531	537	509	484	476	474	474	484	498	513	532	547	77	-63	73	
Hawthorne	244	259	234	250	247	250	254	247	267	276	278	289	293	301	305	3	29	29	
Kearney	322	337	281	307	286	282	265	262	274	296	315	329	357	379	394	-36	10	99	
Southview	422	401	425	448	442	444	446	439	426	417	413	411	408	409	407	20	-25	-10	
Out-of-District	39	39	38	32	53	52	50	49	45	42	43	44	44	45	47	14	-11	4	
Sub-total	1,487	1,548	1,487	1,568	1,565	1,537	1,500	1,473	1,487	1,505	1,534	1,571	1,615	1,665	1,701	78	-60	196	
Middle/Junior High School:																			
Kearney Middle	526	515	557	518	483	544	577	573	546	519	524	537	545	552	558	-43	36	39	
Kearney Jr. High	557	566	541	548	562	520	494	555	598	599	570	546	554	567	571	5	37	-28	
Out-of-District	16	18	19	19	26	28	31	31	33	35	34	34	32	30	31	10	9	-3	
Sub-total	1,099	1,099	1,117	1,085	1,071	1,092	1,102	1,159	1,177	1,152	1,128	1,118	1,131	1,149	1,160	-28	81	8	
High School																			
Kearney High	860	878	794	823	817	801	818	783	783	795	876	910	896	863	843	-43	-22	48	
Out-of-District	18	15	12	11	9	10	13	16	19	22	21	23	26	28	27	-9	13	5	
Sub-total	878	893	806	834	826	811	831	799	802	817	897	933	922	891	870	-52	-9	53	
Grand Total	3,464	3,540	3,410	3,487	3,462	3,440	3,433	3,431	3,466	3,474	3,559	3,622	3,668	3,705	3,731	-2	12	257	

Sources: Kearney Schools; Applied Economics, 2023.

Projections by attendance area are based on where students live, not where they attend.

Attend vs. Reside

School	Attendance Area					Total Attend	Total Reside	Difference	
	1	2	3	4	Outside				
Elementary									
Dogwood	1	422	6	11	9	19	467	537	-70
Hawthorne	2	15	202	20	13	4	254	247	7
Kearney	3	7	7	212	2	6	234	286	-52
Southview	4	30	19	23	396	16	484	452	32
LENS		63	13	20	32	8	136	0	136
Total Reside		537	247	286	452	53	1,575	1,522	53
Attend = Reside		79%	82%	74%	88%		81%		

Source: Kearney School District; Applied Economics, 2023.

The amount of movement of students between elementary schools is relatively small, with much of it being driven by the LENS program.

While small, these variations can impact classroom planning and teacher staffing.

School Projections

School	Actual					Projected										Change		
	2017/18	2018/19	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2017-22	2022-27	2027-32
Elementary (K-5):																		
Dogwood	452	490	466	458	465	436	410	402	398	396	407	422	436	455	472	13	-69	75
Hawthorne	279	295	260	263	254	257	260	254	274	282	285	296	299	307	312	-25	28	30
Kearney	273	286	244	243	234	229	212	208	219	240	259	273	302	324	340	-39	6	100
Southview	483	477	461	473	479	480	482	475	461	452	447	445	442	443	442	-4	-27	-9
LENS	0	0	56	131	133	135	135	135	135	135	135	135	135	135	135	133	2	0
Sub-total	1,487	1,548	1,487	1,568	1,565	1,537	1,500	1,473	1,487	1,505	1,534	1,571	1,615	1,665	1,701	78	-60	196
Middle/Junior High School:																		
Kearney Middle	531	524	568	527	500	559	592	589	564	538	540	552	561	567	573	-31	38	35
Kearney Jr. High	568	575	549	558	571	533	510	570	613	614	588	566	570	582	587	3	43	-27
Sub-total	1,099	1,099	1,117	1,085	1,071	1,092	1,102	1,159	1,177	1,152	1,128	1,118	1,131	1,149	1,160	-28	81	8
High School																		
Kearney High	878	893	806	834	826	811	831	799	802	817	897	933	922	891	870	-52	-9	53
Grand Total	3,464	3,540	3,410	3,487	3,462	3,440	3,433	3,431	3,466	3,474	3,559	3,622	3,668	3,705	3,731	-2	12	257

Sources: Kearney Schools; Applied Economics, 2023.

Projections by school incorporate current attend/reside patterns, which are likely to shift over time.

Conclusions

The District's geographic position, freeway accessibility and high quality suburban and rural lifestyle choices make it a great exurb destination for those seeking to escape the congestion and the other negative aspects of urban life.

The rate of enrollment growth, particularly in the lower grades, is directly tied to the availability of affordable housing. Presently there are very few options, and none could really be considered affordable to young families.

Although several new residential development projects are expected to break ground in the next five years, no substantial impacts on enrollment are expected until the second five years of the projection period.

In the longer term, the District has fairly large potential for housing development, and is well-situated to benefit from economic expansion in the area, but how much and where that growth occurs will depend on housing options and affordability.