

Executive Summary

HousingWorks Austin is a nonprofit organization that aims to increase the supply of affordable housing in Austin by providing research, education, advocacy, and thoughtful, workable affordable housing policy recommendations.

In the 2021 Austin-Round Rock-Georgetown MSA Five County and Travis County Precinct Analysis, we've made a few noteworthy changes that we hope will add more context to the picture of housing affordability in the Austin region.

- To give a more specific picture of affordable housing development throughout the MSA, we have added information on the status of subsidized affordable housing in each County and Travis County Precinct, highlighting the number of units that are currently in operation in comparison to those that are planned or under development. The total number of subsidized affordable housing units includes both existing and planned units.
- Secondly, with the future expansion of transit in Austin through Project Connect, we wanted to have a better understanding of how many subsidized housing units are currently located along high-frequency public transportation routes. We hope that as the transit network expands through Project Connect, a greater percentage of affordable housing units will be located along high-frequency transit.
- Lastly, due to the health risks posed by COVID-19, Ending Community Homelessness (ECHO) did not conduct the annual count to identify the number of individuals experiencing unsheltered homelessness in Austin/Travis County was not conducted this past year. In place of the annual count, we have worked with ECHO to present an alternative measure in this year's Precinct Analysis that highlights the areas of Travis County where households are losing their housing. While this measure highlights different information than the regular count of individuals experiencing unsheltered homelessness, we believe it adds important context to the causes of homelessness in Travis County.

The 2021 Austin-Round Rock-Georgetown MSA Five County and Travis County Precinct Analysis shows that the Austin region continues to experience rapid growth and an increasingly expensive housing market. Additionally, since this report only considers demographic and housing market data collected during the calendar year 2021, it does not account for the continuing rise of housing prices in the current market, which has seen the median home sale price rise above \$520,000¹ and the average rent increase by up to 40% throughout the MSA.²

The release of the 2020 Census results confirmed the region's rapid growth over the past decade:

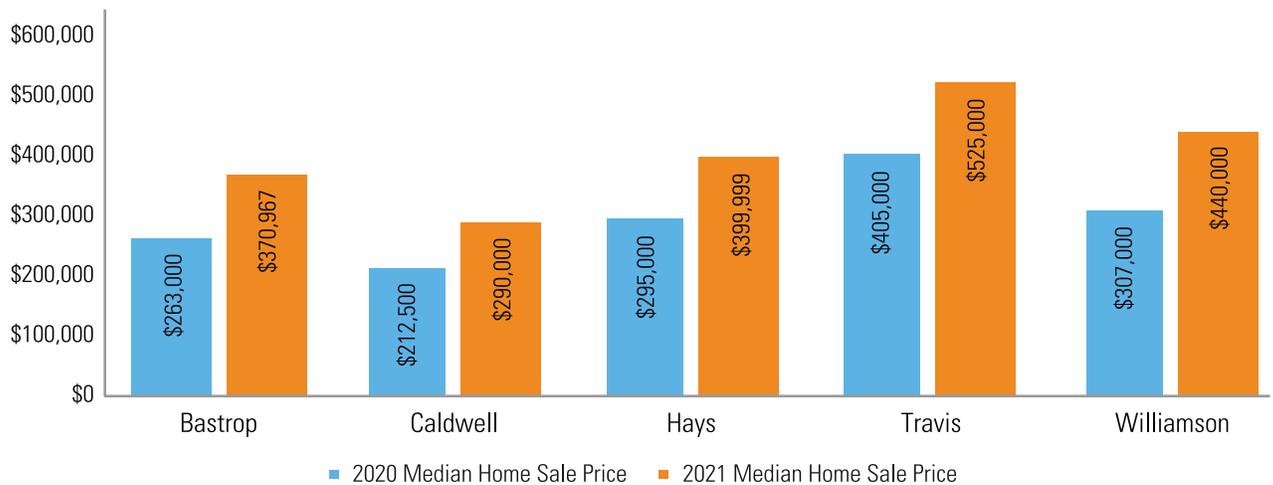
- The Austin-Round Rock-Georgetown MSA was the fastest growing large metropolitan area in the country between 2010 to 2020, growing by 33% over the past 10 years (a population increase of 567,082 people).³
- Hays County was the fastest-growing large county in the country in the past 10 years, growing by 53%, and Williamson County was the fourth fastest-growing large county with a growth rate of 44%.⁴
- Accordingly, the Austin region saw some of the most significant increases in housing production, as Hays, Williamson, and Travis County all saw the largest increase in housing units amongst counties throughout the country with similar population sizes.⁵

1. Austin Board of Realtors, "Central Texas Housing Market Report: April 2022" (April 2022)
2. Redfin, "Rental Market Tracker: Asking Rents Increased 40% Year Over Year in Austin" (3/21/2022). <https://www.redfin.com/news/redfin-rental-report-february-2022/>
3. Mackun, Paul, Johsua Comenetz, & Lindsay Spell, "Around Four-Fifths of All U.S. Metro Areas Grew Between 2010 and 2020" (8/12/2021). US Census Bureau. <https://www.census.gov/library/stories/2021/08/more-than-half-of-united-states-counties-were-smaller-in-2020-than-in-2010.html>
4. Austin Chamber of Commerce, "Highlights from Census 2020" (10/06/2021). <https://www.austinchamber.com/blog/10-06-2021-census-2020>
5. Brassell, Evan, "Despite Slower Overall National Growth, Housing Stock Rapidly Expanded in the South and West from 2010 to 2020" (8/12/2021). US Census Bureau. <https://www.census.gov/library/stories/2021/08/growth-in-housing-units-slowed-in-last-decade.html>

Despite the increase in the number of housing units, housing costs have risen by over 36% across the MSA from 2020 to 2021.

- In the Austin MSA as a whole, the median home sale price increased by \$150,000 to \$468,000 while the average monthly rent rose by \$436 to \$1,601 a month in 2021.
- In all 5 counties within the Austin MSA, median home sale prices and average rents have soared between 2020 and 2021, with home prices increasing by as much as 43% and rents increasing by as much as 32%.
- As the chart below illustrates, the most significant housing cost increases between 2020 and 2021 were seen in Williamson County and Bastrop County, but all five counties experienced home sale price increases of at least 30% and rent price increases of at least 8%.

Median Home Sale Price Increases by County (2020 to 2021)



Average Rent Increases by County (2020 to 2021)



The sharp increases in home prices and rents underline the continued need for housing across the entire region. However, nearly 80% of the subsidized affordable housing units in the MSA are located in Travis County alone. Meanwhile, households in all counties struggle to pay for increased housing costs:

- In all counties but Bastrop, over 1 in 4 households are housing cost burdened, defined as paying more than 30% of their income to housing costs. Furthermore, over 10% of households in all counties but Bastrop pay more than half of their income to housing costs (extremely cost burdened).
- While the median family income in the Austin MSA has risen by 15%, the poverty rate and the percentage of households who experience housing cost burden in the MSA have changed less than 1%, suggesting that gains in wealth have not benefited low-income households to the same extent as other households in the region.

The continued high rate of cost-burdened households amid rapid growth of housing prices and incomes in the Austin MSA underlines the significant need for subsidized affordable housing units across the region. As part of this year's iteration of the County and Precinct Analysis, we have included a breakdown of the status of subsidized affordable housing units, highlighting the share of subsidized units which are currently available to households against the share of subsidized units that are planned.

- In all counties other than Travis County, the majority of subsidized units are currently existing, with at least 70% of the subsidized units already completed.
- In Bastrop and Caldwell counties, fewer than 5% of all subsidized housing units are in development. The lack of planned affordable housing in these areas suggests an even greater need to address the lack of affordable housing in recent years to keep pace with population and income growth.

Within Travis County, which contains nearly 80% of the subsidized affordable housing throughout the entire region, affordable housing is unevenly distributed:

- 78% of the county's subsidized housing is consolidated within only two precincts: Precincts 1 and 4.
- Furthermore, 55% of subsidized housing in Travis County located outside of the City of Austin are within Precinct 1 alone.

Additionally, households in some Precincts struggle to pay for housing at greater rates than those in other Precincts:

- In Precincts 1 and 4, over 47% of renter households experience housing cost burden, while in Precincts 2 and 3 the percentage of cost-burdened renters drops to 42%.
- Data tracking individuals experiencing homelessness underlines this disparity, as an estimated 73% of unhoused Travis County residents last lived in Precincts 1 and 4.⁶

However, all four precincts do have significant development pipelines for subsidized housing located outside of the City of Austin:

- At least 37% of the subsidized units in all four Precincts are in development.
- 58% of subsidized units located outside of the City of Austin in Precinct 4 are in development.

The encouraging signs of affordable housing in Travis County suggest movement toward an increased rate of subsidized housing development. However, to ensure that there is sufficient affordable housing to meet the demands of the intense growth in other counties, namely Hays and Williamson, and rising housing prices throughout the Austin MSA, greater efforts in all five counties should be made to focus on adding more subsidized units affordable to low-income households, so that everyone across the Austin region can access safe and affordable housing.



Nora Linares-Moeller
Executive Director, **HousingWorks Austin**

6. See methodology for a description of this measure, which differs from the Point-in-Time count of individuals experiencing homelessness that the County and Precinct Analysis has shown in the past.

Key Takeaways for the Five-County Austin-Round Rock-Georgetown MSA

BASTROP COUNTY:

- Bastrop County was the only county in the Austin-Round Rock-Georgetown MSA that did not see the poverty rate decline in the past year. Whereas the poverty rate across the five counties went down by 0.6%, Bastrop County showed a slight increase (+.1%) in poverty since 2020, with the poverty rate at 11.3%.
- Bastrop County has a higher percentage of older individuals than other counties in the MSA, with 14.4% of the population over the age of 65 and the median age in the county at 38 years old, 1.5 years more than any other county.
- Households in Bastrop County drive more on average than residents in other counties in the region. The average household in Bastrop County drives 25,688 miles every year.

CALDWELL COUNTY:

- With only 681 subsidized units located within Caldwell County, Caldwell contains the fewest subsidized affordable housing units out of all counties in the Austin-Round Rock-Georgetown MSA. Additionally, Caldwell is the only county without any subsidized units planned to be completed in the near future. Developers and policy makers should increase efforts to add subsidized affordable housing in Caldwell to combat the rising housing costs the low- and moderate-income households are experiencing across the Austin region.
- Caldwell County residents have less wealth on average than residents in other counties in the Austin region. The county shows the lowest median family income, at \$68,289, and the highest poverty rate, at 15.8%. However, the county showed the largest reduction of poverty throughout the five-county MSA over the past year, as the poverty rate went down by 3.1%.
- With homes selling for \$290,000 and units renting for \$1,066 on average, Caldwell County has the least expensive housing in the Austin region. However, the cost of housing has risen significantly over the past year in the county. The average rent has increased by 8.3% (+\$81) and the median home sale price has increased by 36.5% (+\$77,500) from 2020 to 2021.

HAYS COUNTY:

- Over the past 10 years, Hays County was the fastest growing county (with a population over 100,000) in the entire country, as the population increased by 53% by 83,960 residents to a population of 241,067 according to the 2020 Census.⁷
- Hays County has some of the highest rates of housing cost burden in the region, with 1 in 3 households paying 30% or more of their income toward housing costs and 1 in 6 paying 50% or more of their income to housing (extremely cost burdened).



TRAVIS COUNTY:

- Travis County contains the most subsidized affordable housing out of all 5 counties in the Austin-Round Rock-Georgetown MSA, with 79% of the region's subsidized units located in Travis County alone.
 - Over the past year, the number of subsidized units located in Travis County outside of the City of Austin has increased by 11.9% (+734 units), while subsidized units across the county as a whole has increased by 13.5% (+6,258 units).
 - Travis County has the most expensive housing in the Austin region, as homes sold for \$525,000 and units rented for \$1,632 on average. Rents in Travis County increased at some of the highest rates than in the region, with a 28.3% increase (+\$359) from 2020 to 2021.
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WILLIAMSON COUNTY:

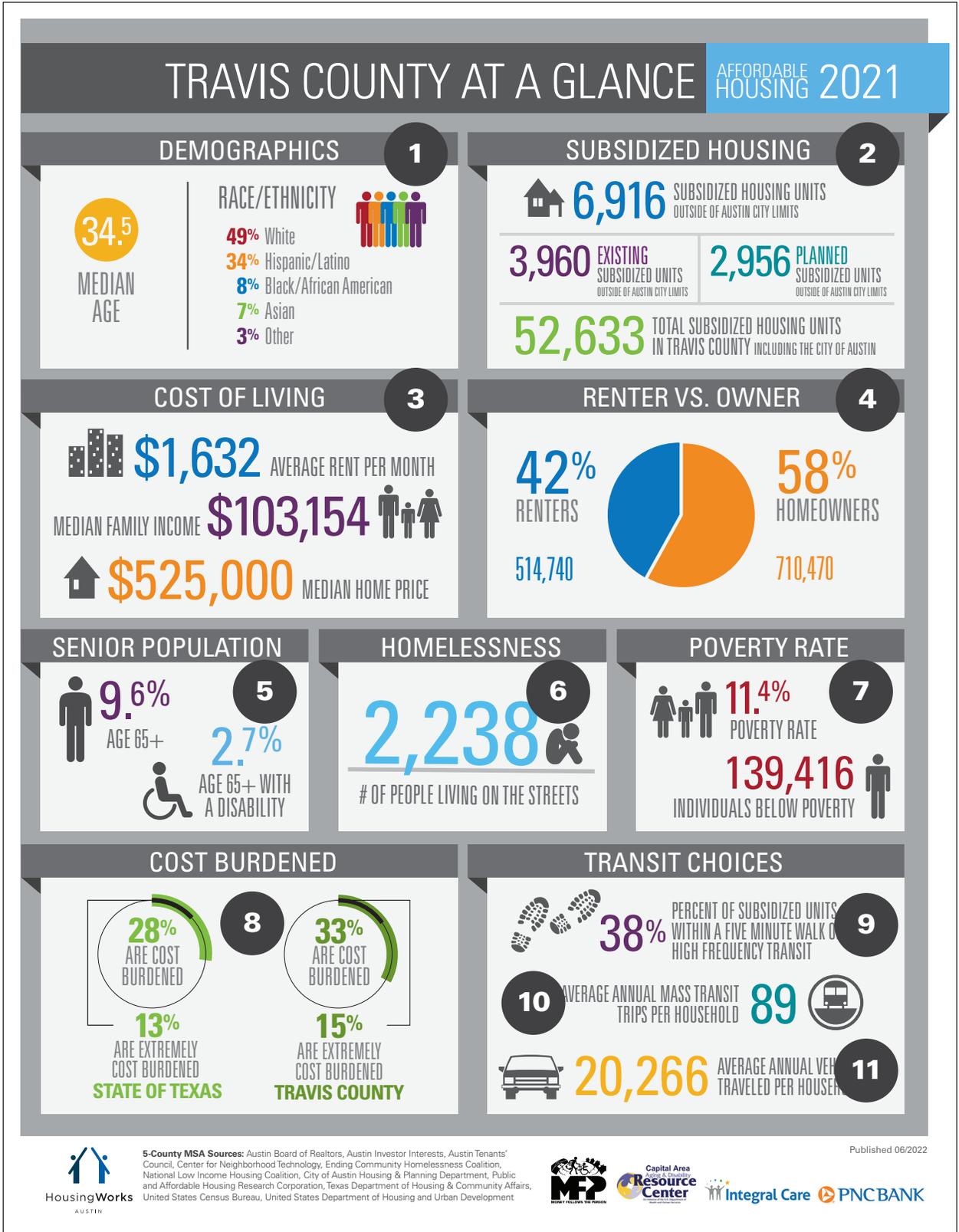
- Housing prices increased more in Williamson County than in any other part of the Austin MSA from 2020 to 2021, with the median home sale price increasing by \$133,000, a 43.3% increase, and average rents jumping by 31.6%, \$367 more in monthly rent.
 - Despite containing 26% of the region's population, only 11% of the MSA's subsidized affordable housing is located in Williamson County. Furthermore, only 1,625 subsidized units are currently planned for Williamson County, significantly fewer than the 5,632 that are currently existing.
 - On average, Williamson County residents are wealthier than residents in any other county in the Austin-Round Rock-Georgetown MSA, with the county's median family income at \$104,621. Additionally, with a poverty rate of 6.1%, a smaller percentage of Williamson County residents live in poverty than in the other four counties in the region.
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Austin-Round Rock-Georgetown MSA County Analysis Sources & Methodology

The county and precinct analyses are based on a variety of sources and these are mentioned on each county and precinct analysis sheet. The numbers below correspond with the numbers marked on the figure above for reference.

Sources

- **SOURCE 1:** United States Census Bureau, 2016-2020 5-Year American Community Survey. Precinct Analysis based on methodology 1.
- **SOURCE 2:** Multiple sources are combined to create a comprehensive list for precinct or counties respectively.
 - Housing and Planning Department City of Austin, Accessed 2022
 - Texas Department of Housing & Community Affairs, Accessed 2022
 - National Low Income Housing Coalition and Public and Affordable Housing Research Corporation, Accessed 2022
 - Housing Authority of the City of Austin, Accessed 2022
 - Housing Authority of Travis County, Accessed 2022
 - Travis County Housing Finance Corporation, Accessed 2022
 - United States Department of Housing and Urban Development, Accessed 2022
 - Various county housing resources.
 - Precinct Analysis based on methodology 3¹.
- **SOURCE 3:** Austin Investor Interests, Q4 2021, Austin Board of Realtors (ABOR), Q4 2021. Precinct Analysis based on methodology 2; United States Census Bureau, 2016-2020 5-Year American Community Survey. Precinct Analysis based on methodology 1.
- **SOURCE 4:** United States Census Bureau, 2016-2020 5-Year American Community Survey. Precinct Analysis based on methodology 1.
- **SOURCE 5:** United States Census Bureau, 2016-2020 5-Year American Community Survey. Precinct Analysis based on methodology 1.
- **SOURCE 6:** Ending Community Homelessness Coalition (ECHO) 2022. See note in Methodology for “Measure for Homelessness in 2021 Reports”.
- **SOURCE 7:** United States Census Bureau, 2016-2020 5-Year American Community Survey. Precinct Analysis based on methodology 1.
- **SOURCE 8:** United States Department of Housing and Urban Development Comprehensive Housing Affordability Strategy (CHAS) Dataset, 2014-2018. Precinct Analysis based on methodology 1.
- **SOURCE 9:** Capital Metropolitan Transit Authority, Accessed 2022; See Source 2 for details on unit list. Analysis based on methodology 4.
- **SOURCES 10-11:** Center for Neighborhood Technology Housing and Transportation Affordability Index, 2022. Precinct Analysis based on methodology 1.



Methodology

Methodological Note: *With the release of the 2020 Decennial Census results, the geographies used by the Census Bureau to approximate neighborhood-level demographic summaries (Census Tracts) were re-organized to account for the changes in population that have occurred since the last Census (2010). Due to these Census Tract boundary changes, as well as slight changes to Precinct boundaries following redistricting in Travis County, the relationship between Tracts and Precincts outlined in methodology 1 needed to be updated for this year's analysis. Therefore, the figures in this year's Precinct reports are not directly comparable to those in previous years, since the demographic totals for Precincts includes the summarized counts for different Census Tracts.*

The 5-MSA County analysis takes information summarized at the county-level from various sources outlined in the list above. Additionally, point data that is associated with distinct addresses, such as the data collected from the sources listed above, is linked to county boundaries by its overlap.

The Travis County precinct analysis is based on a number of resources and different geographical scales. The other four counties are not based on geographical scales. Furthermore, the precinct data is analyzed in the context of the boundaries of the Travis County Precincts. This has led to three separate approaches based on geographic scale of source data:

- 1. Census tract data:** Data available at the census tract level is analyzed based on a methodology developed after conversation with the City of Austin demographic staff. Census tracts are divided according to their overlap with the Travis County Precinct boundaries. Tracts that overlap between two precincts are attributed to one precinct based on the overlap area and the existing land use type. Once all the tracts have been linked to a precinct, the corresponding data is calculated for that precinct. For average values such as median family income and age, the data is weighed for each census tract based on its total population using Microsoft Excel.
- 2. Zip code data:** Data available at the zip code level is analyzed using the Zonal Statistics as Table tool in the Spatial Analyst toolbox of the ArcGIS software. This requires converting vector source data into the raster format and then using the tool to summarize the values of the raster based on the zones of another dataset (Travis County Precinct boundaries in this case). The results from the generated table then provide a value at the Precinct level.
- 3. Point Data:** Data associated with distinct addresses, such as the data collected from the sources above, is linked to Travis County Precinct boundaries by its overlap.
- 4.** To calculate the percentage of subsidized units within a five-minute walk of high frequency transit, stops on CapMetro's high frequency public transportation network is used to construct a Network Analyst model in ArcGIS software. Using a shapefile of all roads in the City of Austin and Travis County and the CapMetro high frequency route stops, a watershed is developed using the Network Analyst to identify areas within a ¼ mile (approximately five-minute walk) by public roads to the nearest high-frequency transit stop.

Measure for Homelessness in 2021 Reports

The Ending Community Homelessness Coalition (ECHO) is the lead agency for the Austin/Travis County Continuum of Care and plans and implements community-wide strategies to end homelessness in Austin and Travis County. ECHO used an alternative methodology in place of the unsheltered Point in Time (PIT) Count in 2021 due to concerns about COVID-19 transmission. Instead of conducting an in-person unsheltered count, ECHO used local Homeless Management Information System (HMIS) data to estimate the scale of unsheltered homelessness in our community on January 28, 2021. The HMIS Snapshot and PIT Count methods are not interchangeable and data from each cannot be compared. However, the 2021 HMIS Snapshot can serve as a placeholder to estimate the number of people experiencing homelessness in Austin/Travis County².

While the Point-in-Time Count typically includes a breakdown of the number of people experiencing homelessness by the Travis County Precinct in which they were counted, the HMIS Snapshot was not able to do so. For the purposes of the 2021 Precinct Analysis, HousingWorks worked with ECHO to create unique Precinct-level measures of estimated homelessness in the City of Austin by using information from the by-name list. The by-name list (BNL) is a list of all heads of household who have entered the Homelessness Response System, completed a Coordinated Assessment (CA), and are awaiting referral or have been referred to a housing program. As part of the Coordinated Assessment, individuals are asked to list the zip code of their last permanent address. To assess the percentage of people experiencing homelessness who lost their most recent housing in each Precinct, HousingWorks aggregated the number of individuals by their listed previous ZIP Code to create ZIP Code-level estimates of inflow to homelessness. These ZIP Code-level measures were then reaggregated to Travis County Precinct boundaries using the HUD USPS ZIP Code Crosswalk files and the Tract to Precinct crosswalk files, which were compiled by HousingWorks and used in other methods of this report.

It is important to note that not all individuals listed on the by-name list were able to note the ZIP Code from their last permanent address, while others had last permanent addresses that fell outside of Austin/Travis County. Therefore, the figures listed in each Precinct report for the percentage of Austinites experiencing homelessness with last address in Precinct only include individuals in the BNL who 1) were able to list the ZIP Code of their last permanent address; and 2) previously resided within Austin/Travis County. In 2021, 57% of people who took the Coordinated Assessment listed their last permanent address in a Travis County ZIP Code.



DEFINITIONS

- **Poverty** - The income cutoffs used by the Census Bureau to determine the poverty status of families and unrelated individuals included a set of forty-eight thresholds arranged in a two-dimensional matrix consisting of family size.
- **Subsidized Housing** – Housing funded through some form of subsidy to ensure units are affordable that limits how much income households can make to rent specific units based on their income.
- **Cost Burdened** - Households that spend more than 30% of their income on housing related costs (rent or mortgage, utilities) are considered cost burdened.
- **Extremely Cost Burdened** - Households that spend more than 50% of their income on housing related costs (rent or mortgage, utilities) are considered cost burdened.
- **Vehicle Miles Traveled** - The average annual auto travel by a household. This includes commute travel, as well as all other daily auto trips.
- **Mass Transit Trips Taken** - The average annual number of fixed-route public transportation trips taken by a household.
- **Planned vs Existing Units** - Existing subsidized units include any development with affordable income-restricted housing units which has received a Certificate of Occupancy, Tenant Income Certification, or is noted as Placed-in Service. Planned Units includes any development which has been approved for funds or is listed in the City of Austin's Affordable Housing Inventory with the column "Status" indicating it is not completed yet.

LIMITATIONS

- American Community Survey (ACS) is based on sampling and thus the data from ACS involves a margin of error. This margin of error varies for 1-year, 3-year, and 5-year data, with decreasing levels of margin of error.
- Considering the varied sources, different geographical scales, and multiple methodologies it is important to understand that most of the data for each county and precinct is best evaluated comparatively and not referenced as absolute numbers.
- The Comprehensive Housing Affordability Strategy (CHAS) Dataset from Housing and Urban Development is based on a rotation of 3-year and 5-year ACS data. This limits the availability of the data in certain years.
- The HUD-defined Median Family Income is used in affordable housing developments to set income limits within the Austin MSA. However, since this analysis aims to show MSA-level data disaggregated by county and precinct for comparison within the Austin region, we have used Median Family Income data from the American Community Survey, at the county and Census tract-level. The ACS data will differ from the HUD-defined MFIs since it takes median incomes for all household sizes, whereas the HUD-defined MFI breaks down according to household size.
- Due to rounding, percentages represented in these graphics may not total 100%.



SUPPLEMENTAL TABLES - COUNTIES

A. Age and Gender by County in the Austin-Round Rock Metropolitan Statistical Area

	Austin-Round Rock MSA (Total)	Austin-Round Rock MSA (%)	Bastrop County	Caldwell County	Hays County	Travis County	Williamson County
Total Population	2,173,804	-	86,839	42,817	222,827	1,250,884	570,437
Male	1,089,474	50.1%	44,089	21,853	110,719	631,786	281,027
Female	1,084,330	49.9%	42,750	20,964	112,108	619,098	289,410
Population 65+	231,942	10.7%	12,491	5,678	24,206	120,694	68,873
Population 65+ with a disability	69,935	3.2%	5,029	2,503	8,032	33,715	20,656

Source: American Community Survey (2016-20)

B. Race/Ethnicity by County in the Austin-Round Rock Metropolitan Statistical Area

	Austin-Round Rock MSA (Total)	Austin-Round Rock MSA (%)	Bastrop County	Caldwell County	Hays County	Travis County	Williamson County
White	1,118,361	51.4%	44,099	16,640	116,980	607,813	332,829
Hispanic/Latino	704,998	32.4%	33,686	22,720	87,907	420,236	140,449
Black/African American	150,328	6.9%	6,196	2,119	8,326	98,769	34,918
Asian	128,388	5.9%	723	423	3,090	83,853	40,299
Other	71,729	3.3%	2,135	915	6,524	40,213	21,942

Source: American Community Survey (2016-20)

SUPPLEMENTAL TABLES - COUNTIES

C. Age and Gender by Travis County Precinct

	Travis County (Total)	Travis County (%)	Precinct 1	Precinct 2	Precinct 3	Precinct 4
Total Population	1,250,884	-	325,506	310,630	318,421	296,327
Male	631,786	50.5%	164,580	157,276	158,340	151,590
Female	619,098	49.5%	160,926	153,354	160,081	144,737
Population 65+	120,694	9.6%	23,869	28,936	42,255	21,423

Source: American Community Survey (2016-20)

D. Race/Ethnicity by Travis County Precinct

	Travis County (Total)	Travis County (%)	Precinct 1	Precinct 2	Precinct 3	Precinct 4
White	607,813	48.6%	107,316	182,795	208,152	109,550
Hispanic/Latino	420,236	33.6%	134,621	76,390	58,673	150,552
Black/African American	98,769	7.9%	51,977	14,937	10,735	21,120
Asian	83,853	6.7%	21,381	27,293	28,236	6,943
Other	40,213	3.2%	10,211	9,215	12,625	8,162

Source: American Community Survey (2016-20)

E. Number of People Experiencing Homelessness in Austin/Travis County by Precinct
(only includes individuals who listed a ZIP Code for their last permanent address in the Coordinated Assessment)

	Travis County (Total)	Precinct 1	Precinct 2	Precinct 3	Precinct 4
Coordinated Assessment Entries with Travis County ZIP Code listed as last permanent address	2,053	680	346	208	818

Source: Ending Community Homelessness (2021)