

## 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 District-by-District Analysis and Austin Community at a Glance, we've made a few noteworthy changes that we hope will add more context to the picture of housing affordability in the City of Austin.

- To give a more specific picture of affordable housing development throughout Austin, we have added information on the status of subsidized affordable housing in each Council District, 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 concerns during the COVID-19 Pandemic, 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 District-by-District Analysis that highlights the areas of Austin 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 Austin.

The 2021 District-by-District Analysis and Austin Community at a Glance shows that the City of Austin is undergoing a rapid increase in housing costs, while affordable housing options for households remain unevenly distributed throughout the city. 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 City of Austin median home sale price rise above \$600,000<sup>1</sup> and the average rent increase by up to 40%.<sup>2</sup>

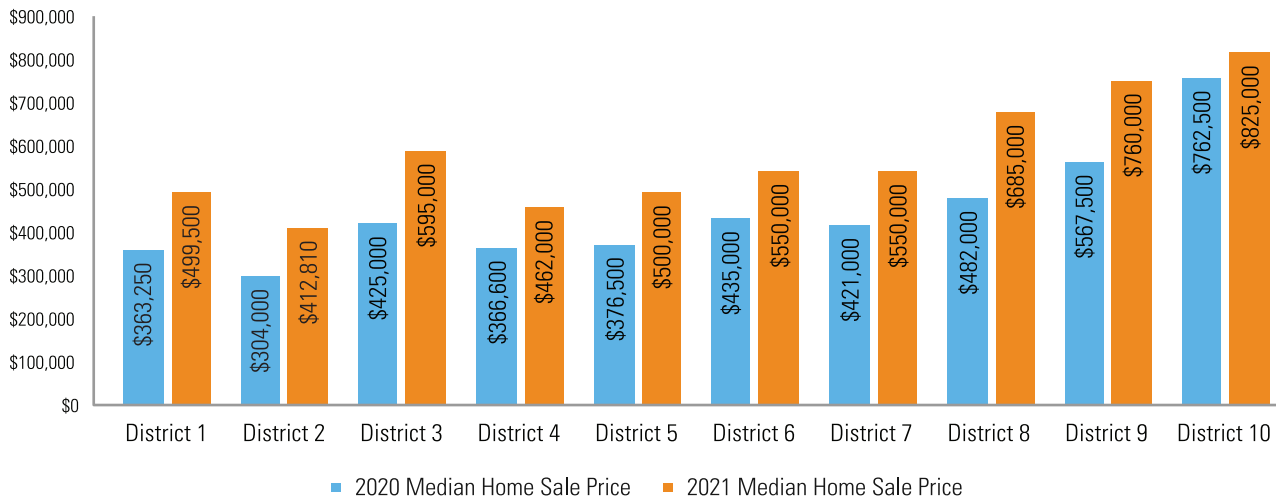
Over 2021, housing prices have increased significantly across the entire city:

- Between 2020 and 2021, the median home sale price has risen from \$424,900 to \$536,311, a 26% increase across the whole city.
- Additionally, the average monthly rent has gone up by \$359 to \$1,658, a 27% increase from 2020 across the whole city.
- The steep increases in housing prices for both owners and renters over the past year have not been matched by an increase in the average household's wealth. Median family incomes grew by 12%, less than half of the growth rate of housing costs, and the poverty rate went down by less than 2%.

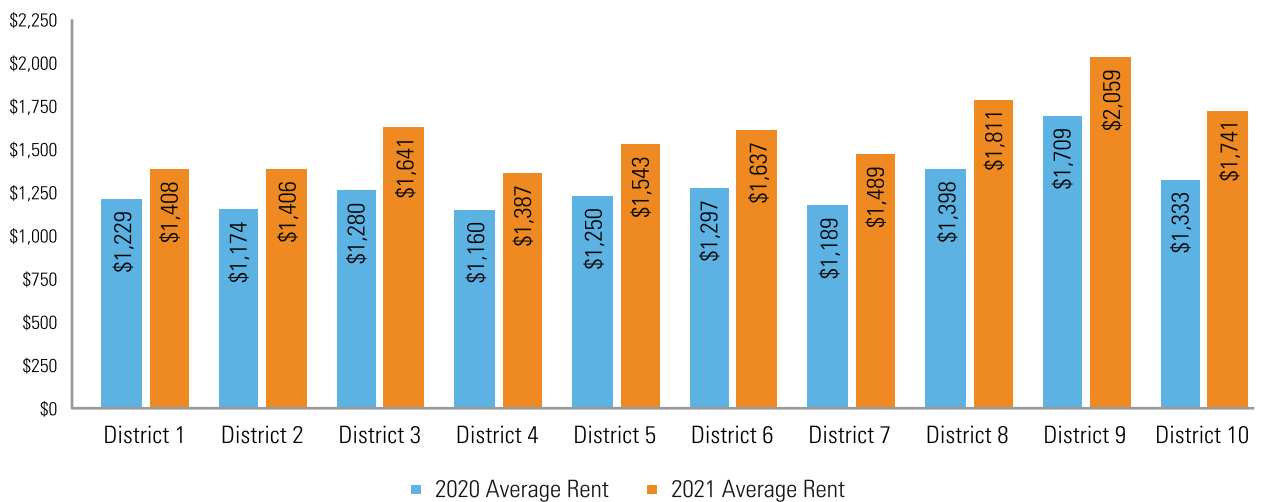
In nearly every Council District across the city, home sale prices have increased by at least 26% and average rents by at least 15% from 2020 to 2021.



## Median Home Sale Price Increases by Austin City Council District (2020 to 2021)



## Average Rent Increases by Austin City Council District (2020-2021)



However, the economic disadvantages that stem from a history of racial discrimination within certain parts of the city have led to these sharp price increases yielding more significant impacts on families' housing stability in certain Districts.

- In Districts 1, 2, 3, and 4, at least 48% of renter households pay 30% or more of their income toward housing (housing cost burdened).
- Whereas in Districts 6, 8, and 10 less than 39% of renter households are housing cost burdened.
- Furthermore, 65% of the Austinites who experienced unsheltered homelessness in the past year last lived in Districts 1, 2, 3, and 4 prior to losing their housing.
- In comparison, only 5% of those experiencing homelessness were previously living in Districts 6, 8, and 10.



This unique measure included in this year's District-by-District Analysis temporarily replaces the count of unhoused individuals, known as the Point in Time count, which was put on hold during the COVID-19 Pandemic. The measure outlined in this year's report allows us to estimate where families with the most unstable housing are struggling to stay in their homes.

These findings not only suggest that the city needs more affordable housing in Districts 1, 2, 3, and 4, but also emphasize the lack of affordable and accessible housing for low- and moderate-income households in high-cost areas of Austin, primarily west of MoPac Expressway.

- Districts 6, 8, and 10, where home sale prices and rents are well above the city average, contain less than 6% of the city's subsidized units between the three Districts.
- **In comparison, Districts 1, 2, and 3 contain 58% of the city's subsidized housing.**

The high cost of housing and short supply of affordable housing in certain parts of the city make it very difficult for many households to have the ability to choose to live in all parts of Austin. As Austin continues to experience unprecedented housing prices, the continued growth of affordable housing options for low- and moderate-income families has become a priority. To ensure that any Austin household is able to comfortably afford their home and feel they have a choice in where they can live, the city must be proactive in advancing efforts to increase the supply of affordable and accessible housing for all incomes and in all parts of the city.

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

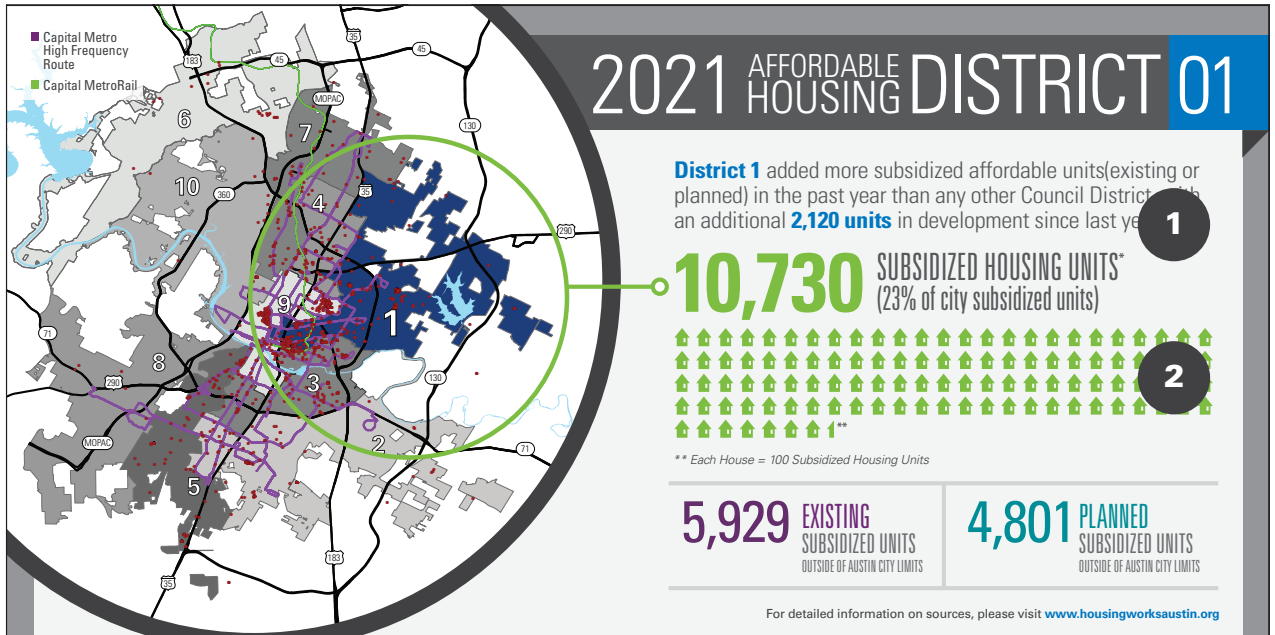
## District Analysis Sources & Methodology

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

### Sources

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- **SOURCE 1:** Combination of sources below along with data from the 2020 Affordable Housing District Analysis.
- **SOURCE 2:** Multiple sources are combined to create a comprehensive list.
  - 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 2020
  - District Analysis based on methodology 3.<sup>1</sup>
- **SOURCE 3:** United States Census Bureau, 2016-2020 5-Year ACS. District Analysis based on methodology 1.
- **SOURCE 4:** Ending Community Homelessness Coalition (ECHO), 2022. See note in Methodology for “Measure for Homelessness in 2021 Reports”
- **SOURCE 5:** Austin Investor Interests, Q4 2021. District Analysis based on methodology 2.
- **SOURCE 6:** Austin Board of Realtors (ABOR), Q4 2021. Data available at City Council District Level.
- **SOURCE 7:** United States Census Bureau, 2016-2020 5-Year ACS. District Analysis based on methodology 1.
- **SOURCE 8:** United States Census Bureau, 2016-2020 5-Year ACS. District Analysis based on methodology 1.
- **SOURCE 9:** United States Census Bureau, 2016-2020 5-Year ACS. District Analysis based on methodology 1.
- **SOURCES 10-11:** United States Department of Housing and Urban Development Comprehensive Housing Affordability Strategy (CHAS) Dataset, 2014-2018. District Analysis based on methodology 1.
- **SOURCES 12:** Capital Metropolitan Transit Authority, Accessed 2022; See Source 2 for details on unit list. Analysis based on methodology 4.
- **SOURCES 13-14:** Center for Neighborhood Technology Housing and Transportation Affordability Index, Accessed 2020. District Analysis based on methodology 1.



<h3>DEMOGRAPHICS</h3> <p><b>33.2</b> MEDIAN AGE</p> <p><b>8.3%</b> AGE 65+</p> <p><b>3</b></p> <p>RACE/ETHNICITY</p> <ul style="list-style-type: none"> <li>29% White</li> <li>43% Hispanic/Latino</li> <li>20% Black/African American</li> <li>6% Asian</li> <li>3% Other</li> </ul>	<h3>HOMELESSNESS</h3> <p><b>4</b></p> <p>% OF UNHOUSED AUSTINITES WHO LAST LIVED IN DISTRICT 1</p> <p><b>19%</b></p>	<h3>COST OF LIVING</h3> <p><b>5</b></p> <p><b>\$1,408</b> AVERAGE RENT</p> <p><b>6</b></p> <p><b>\$68,890</b> MEDIAN FAMILY INCOME</p> <p><b>7</b></p> <p><b>\$495,700</b> MEDIAN HOME PRICE</p>	<h3>RENTER VS. OWNER</h3> <p><b>8</b></p> <p><b>55%</b> % OF HOMEOWNERS IN PRECINCT</p> <p>44,267</p> <p><b>45%</b> % OF RENTERS IN PRECINCT</p> <p>54,195</p>
<h3>POVERTY RATE</h3> <p><b>9</b></p> <p><b>14.7%</b> POVERTY RATE</p> <p><b>14,487</b> INDIVIDUALS BELOW POVERTY</p>	<h3>TRANSIT CHOICES</h3> <p><b>12</b></p> <p><b>27%</b> PERCENT OF SUBSIDIZED UNITS WITHIN A FIVE MINUTE WALK OF HIGH DENSITY TRANSIT</p> <p><b>71</b> ANNUAL MASS TRANSIT TRIPS TAKEN COUNTYWIDE</p> <p><b>13</b></p> <p><b>14</b></p> <p><b>20,464</b> AVERAGE ANNUAL VEHICLE MILES TRAVELED IN PRECINCT</p>		
<h3>COST BURDEN</h3> <p><b>10</b></p> <p><b>24%</b> ARE COST BURDENED</p> <p><b>10%</b> ARE EXTREMELY COST BURDENED HOMEOWNERS</p> <p><b>11</b></p> <p><b>49%</b> ARE COST BURDENED</p> <p><b>27%</b> ARE EXTREMELY COST BURDENED RENTERS</p>			





## 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, the relationship between Tracts and Council Districts outlined in methodology 1 needed to be updated for this year's analysis. Therefore, the figures in this year's District reports are not directly comparable to those in previous years, since the demographic totals for Districts includes the summarized counts for different Census Tracts.*

The district analysis consults a number of resources at different geographical scales. Furthermore, this data is analyzed in the context of the boundaries of the City of Austin Council Districts. 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 Austin City Council District boundaries. Tracts that overlap two council districts have their demographic values divided by their approximate percentage within each Council District. No Census tract falls within more than two Council Districts. Once all the tracts have been linked to the Council District they fall within, the corresponding data is calculated for that District. For average values such as median age and median family income, the data was calculated by Council District using an aggregation method performed by the City of Austin demographic staff.
- 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 (Austin City Council District boundaries in this case). The results from the generated table then provide a value at the district level.
- 3. Point Data:** Data associated with distinct addresses, such as the data collected from the sources above, is linked to Austin City Council District 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 the CapMetro high frequency route stops, a walkshed 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 County.<sup>2</sup>

The number of individuals experiencing unsheltered homelessness from the 2021 HMIS Snapshot for Austin/Travis County Continuum of Care area was used in the Austin At A Glance report for the City of Austin overall. Note that due to the methodological limitations of the HMIS Snapshot when compared to the Point-in-Time Count, the count of unsheltered homelessness in the Austin at a Glance report includes individuals located in parts of Travis County outside of the City of Austin. For context, in the two most recent Point-in-Time Counts (2019 and 2020), 95% of the total number of unsheltered individuals in Travis County were located within the City of Austin.

While the Point-in-Time Count typically includes a breakdown of the number of people experiencing homelessness by the Council District in which they were counted, the HMIS Snapshot was not able to do so. For the purposes of the 2021 District-by-District Analysis, HousingWorks worked with ECHO to create unique District-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 either 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 City Council District, HousingWorks aggregated the number of individuals by the previous ZIP Code that they listed in their most recent Coordinated Assessment to create ZIP Code-level estimates of inflow to homelessness. These ZIP Code-level measures were then reaggregated to Council District boundaries using the HUD USPS ZIP Code Crosswalk files and the Tract to District crosswalk files, which were compiled by the City of Austin Demographer and 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 a handful of others had last permanent addresses that fell outside of Austin/Travis County. Therefore, the figures listed in each District report for the percentage of Austinites experiencing homelessness with last address in District 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.

2. Ending Community Homelessness, "2021 HMIS Snapshot" (5/21/2021)  
[https://www.austinecho.org/wp-content/uploads/2021/08/HMIS\\_Snapshot\\_2021\\_Prevalence\\_05.21.2021.html](https://www.austinecho.org/wp-content/uploads/2021/08/HMIS_Snapshot_2021_Prevalence_05.21.2021.html)



## Definitions

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- **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

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- Due to rounding, percentages represented in the report graphics may not total 100%
- 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 data disaggregated by Council District for comparison within the City of Austin, we have used Median Family Income data from the American Community Survey, at the 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.





## ADDITIONAL DEMOGRAPHIC TABLES

### A. Age and Gender by Austin City Council District

	Austin (Total)	Austin (%)	District 1	District 2	District 3	District 4	District 5	District 6	District 7	District 8	District 9	District 10
Total Population	968,782		100,438	100,702	89,353	102,720	97,049	87,428	95,082	98,085	93,553	104,372
Male	493,071	50.9%	51,632	51,343	47,189	54,302	48,694	44,529	47,107	47,681	47,099	53,497
Female	475,711	49.1%	48,806	49,360	42,164	48,419	48,356	42,899	47,975	50,404	46,454	50,875
Population 65+	90,708	9.4%	8,337	7,816	6,281	8,481	10,315	9,129	8,321	11,350	5,770	14,909

Source: American Community Survey (2016-20)

### B. Race/Ethnicity by Austin City Council District

	Austin (Total)	Austin (%)	District 1	District 2	District 3	District 4	District 5	District 6	District 7	District 8	District 9	District 10
White	467,669	48.3%	28,701	26,849	33,462	27,430	53,246	46,627	54,572	62,137	59,626	75,020
Hispanic/Latino	325,238	33.6%	43,322	63,146	42,691	58,309	32,724	13,466	20,275	20,196	16,872	14,237
Black/African American	70,556	7.3%	19,788	7,004	7,851	10,597	3,707	3,751	7,267	2,751	5,057	2,784
Asian	71,962	7.4%	5,837	1,745	2,639	3,822	3,464	19,326	9,059	9,407	8,490	8,173
Other	33,356	3.4%	2,789	1,957	2,710	2,563	3,909	4,259	3,910	3,594	3,507	4,158

Source: American Community Survey (2016-20)

### C. Number of People Experiencing Homelessness in Austin by Council District

(only includes individuals who listed a ZIP Code for their last permanent address in the Coordinated Assessment)

	City of Austin (Total)	District 1	District 2	District 3	District 4	District 5	District 6	District 7	District 8	District 9	District 10
Coordinated Assessment Entries with Travis County ZIP Code listed as last permanent address	1,943	361	219	398	279	212	43	213	33	154	31

Source: Ending Community Homelessness (2021)