

## 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.

The 2022 Austin-Round Rock-Georgetown MSA County Analysis shows that the Austin region has continued to experience rapid growth in the cost of living, as home sales and rents climbed to record highs. Despite constantly rising housing prices across all five counties in the MSA, the region saw an increase of almost 8,000 subsidized affordable housing units from 2021, a 12% year-over-year growth. As the need to expand affordable housing options is exacerbated by a heightened cost of living, gains in growing the affordable housing supply across the region will aid the struggles for many low- and moderate-income households.

### Over the past year, the supply of subsidized affordable housing grew substantially:

- From 2021 to 2022, the supply of subsidized affordable housing grew from 66,235 units to 74,147 units across the five county-region.
- Four of the five counties in the MSA (Bastrop as the lone holdout) saw increases of over 10% in their affordable housing supply, with Hays County's supply increasing by 21% and Caldwell County's supply increasing by 41% from the 2021 subsidized unit count.
- As Figure I below illustrates, the two-year trend of subsidized unit counts across the five counties indicates the region has made considerable gains in increasing the affordable housing supply.

**Figure I.** Subsidized Affordable Housing Units by Austin MSA Counties (2020 to 2022)

	2020	2021	2022	2-year Pct Increase
<b>Bastrop</b>	787	775	782	-1%
<b>Caldwell</b>	713	681	963	35%
<b>Hays</b>	4,749	4,889	5,921	25%
<b>Travis</b>	46,375	52,633	58,150	25%
<b>Williamson</b>	6,462	7,257	8,331	29%

In Travis County, which still contains the vast majority of subsidized affordable housing in the region, the redistricting of Commissioners Court Precinct boundaries following the 2020 Census resulted in a number of properties with subsidized affordable housing units shifting Precincts. The redrawing of Precinct boundaries, which took effect at the beginning of 2022, resulted in some changes to the total subsidized unit count in this year's Travis County Precinct Analysis.

- As Figure II illustrates, the new Precinct boundaries had the greatest impact on the subsidized affordable unit count in Precincts 2 and 3.
- Precinct 2 experienced a net change of -1,270 affordable units, with 842 of those units falling outside of the City of Austin.
- Meanwhile, Precinct 3 netted an additional 1,314 affordable units, 40 of which fell outside of the City of Austin.
- Precinct 1 netted the most units located outside of the City of Austin (842 additional units) due to redistricting.

1. Subsidized Affordable Housing is defined in this report as: Housing that is made affordable through subsidies provided by the government or a separate organization which limits specific units to households making below a certain income. This report defines "affordable" as housing units that restrict subsidized units to households with incomes at 80% of the Median Family Income or below.

**Figure II.** Reallocation of Subsidized Affordable Housing Units within Travis County Precincts due to Redistricting

Precinct	Travis County			Travis County Excluding the City of Austin		
	Units Gained from other Precincts	Units Lost from other Precincts	Net Change due to Redistricting	Units Gained from other Precincts	Units Lost from other Precincts	Net Change due to Redistricting
1	842	940	-98	842	0	842
2	1,002	2,272	-1,270	0	842	-842
3	1,430	116	1,314	40	0	40
4	54	0	54	0	0	0

While Travis County continues to contain 78% majority of the region’s subsidized affordable housing, significant increases in subsidized units in Hays and Williamson County, two of the fastest-growing counties in the country over the past decade, represent encouraging trends in providing accessible housing options for families outside of the City of Austin and Travis County. Still, the relative availability of subsidized affordable housing is unequally distributed to households in different counties throughout the region.

- As Figure III shows, Travis County households have the greatest access to subsidized affordable housing units, while Bastrop County households have many fewer options to choose from.
- Despite Williamson County containing the second highest number of subsidized affordable housing units among all five counties in the MSA, Williamson County residents have proportionally fewer affordable housing options to choose from. Williamson contains 26% of the region’s population but only 11% of the region’s subsidized affordable housing supply.
- Within Travis County alone, Precincts 1 and 4 continue to hold 75% of the county’s subsidized affordable housing supply, despite containing only 47.9% of the county’s households.

**Figure III.** Subsidized Affordable Housing Units per 100 Households by Austin MSA Counties

	Subsidized Affordable Housing Units	Households	Subsidized Affordable Housing Units per 100 Households
<b>Bastrop</b>	782	31,271	2.5
<b>Caldwell</b>	963	14,315	6.7
<b>Hays</b>	5,921	84,924	7.0
<b>Travis</b>	58,150	514,227	11.3
<b>Williamson</b>	8,331	217,780	3.8



Meanwhile, both home sale prices and rents have continued to climb in 2022 to unprecedented levels across the region.

- All 5 counties saw median home sale prices increase by at least 7.8% from 2021, as the median sale price across the MSA climbed to over \$500,000 in 2022.
- The two counties furthest away from the City of Austin – Bastrop and Caldwell – experienced the highest percent increases in average rent from 2021 to 2022, as the average rent in Bastrop County grew to \$1,361 (an 8.5% increase) and to \$1,254 in Caldwell (a 17.6% increase).
- In the other three counties in the MSA – Hays, Williamson, and Travis – average rents exceeded \$1,580 in 2022.

The Ending Community Homelessness Coalition (ECHO), the lead agency of the Continuum of Care in Travis County and Austin, conducted the Point in Time (PIT) count - a count of sheltered and unsheltered<sup>3</sup> people experiencing homelessness on a single night in January - for the first time since 2020. Additionally, we have included the PIT counts in Hays and Williamson Counties this year for the first time in our County Analysis to provide a better understanding of homelessness throughout Central Texas. While the PIT count is critical to our understanding of where people experiencing homelessness are located, the nature of a one-time count that occurs one night every two years likely results in an undercount of the number of people experiencing homelessness throughout the area. To better understand the scale of homelessness throughout Travis County, ECHO has created an alternative method to estimate the number of people experiencing homelessness based on administrative data that come from the Homelessness Response System, a network of local organizations and groups providing services and outreach to those experiencing homelessness.

Based on the [Austin/Travis County Homelessness Response Dashboard](#), ECHO estimates that there were 4,191 individuals experiencing unsheltered homelessness in January 2023, significantly higher than the 1,266 individuals counted during the Point-in-Time count conducted that same month. There are a number of reasons for such a significant undercount of unsheltered homelessness during the PIT, some of which are explained in the “Limitations” section of the Methodology for this report. While looking through this County and Precinct Analysis report, it is important to remember that these numbers are likely undercounting the scale of unsheltered homelessness in the Austin region. Either way, we know that thousands of individuals throughout Central Texas lack safe and affordable housing and struggle with homelessness every day.

Although increases in home sale prices and rents were not as steep as the growth seen between 2020 to 2021, the continuous growth of housing costs across the region has brought the need for affordable housing to the forefront for many families. While the substantial increase in subsidized units from 2021 to 2022 across the region will provide more affordable housing for many households, these developments continue to be concentrated in certain parts of the Austin area. The increase in the subsidized affordable housing supply over the past two years across much of the region **is an encouraging start**, but to ensure that Central Texans of all incomes have access to a safe and affordable home of their choice, regional leaders need to take a strong and unified approach to making affordable housing a priority in all parts of the Austin region.

Nora Linares-Moeller  
Executive Director, HousingWorks Austin

3. ECHO defines “Unsheltered Homelessness” as people sleeping in tents, cars, abandoned buildings, and other places not meant to live in. For more information visit ECHO’s Homelessness in Austin infographic.

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

### BASTROP COUNTY:

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- Bastrop County was the only county that did not see an increase in the subsidized affordable units (existing or planned) from 2021 to 2022. Bastrop currently has the least subsidized affordable housing out of all 5 counties in the Austin MSA.
  - Bastrop experienced an 8.7% growth in the median family income in 2022, increasing from \$81,438 to \$88,509, the largest increase out of all counties in the region.
  - Bastrop County contains the highest percentage of homeowners out of all five counties in the MSA, with 78% of residents living in a home owned by the householder.
  - Between 2021 and 2022, Bastrop County became a majority-minority county, as the percentage of people identifying as a person of color increased from 49.2% to 50.7%.
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### CALDWELL COUNTY:

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- Despite containing the lowest housing costs out of all 5 counties, Caldwell County experienced the highest percent increase in housing prices, as the median home sale price increased by 15.8% to \$335,845 and the average rent increased by 17.6% to \$1,254 in 2022.
  - Caldwell County saw the highest percent increase in its subsidized affordable housing supply out of all counties in the Austin MSA, with a 41.4% increase in subsidized affordable housing units (existing or planned) from 2021 to 2022.
  - The poverty rate in Caldwell County decreased by 2.5% from 2021 to 2022, the largest drop out of all counties in the MSA.
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### HAYS COUNTY:

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- Hays County has the highest rate of housing cost burden amongst all counties in the Austin region, with 36% of households paying more than 30% of their income on housing costs and 18% of households paying 50% on housing costs alone. The county also experienced the highest increases in housing cost burden, with a 3% increase in the percentage of households experiencing housing cost burden from 2021 to 2022.
  - Hays County experienced the second highest percent increase in subsidized affordable housing units from 2021, with an additional 1,032 units, a 21.1% increase. Hays also saw the highest percent increase in planned subsidized affordable housing units, with a 60.3% increase from 2021.
  - Hays County is one of only two counties in the region (Williamson the other) where poverty increased in 2022, as the poverty rate in Hays County increased by 0.8% from 2021.
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## Key Takeaways for the Five-County Austin-Round Rock-Georgetown MSA

### TRAVIS COUNTY:

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- Travis County contains the highest housing costs out of all counties in the Austin MSA, with homes selling for \$570,000 and renting for \$1,705 on average in 2022.
  - Travis County is the most populous in the region, as 57% of the MSA population live in Travis County. Travis also contains the most subsidized affordable housing in the Austin region, with the 58,150 affordable units representing 78% of the affordable housing supply in the MSA.
  - In addition to containing the highest share of the region's affordable housing supply, Travis County has the highest percentage of subsidized affordable housing units in development stages, with 43% of the overall affordable housing in Travis County (25,086 units) planning to be available in the near future.
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### WILLIAMSON COUNTY:

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- Williamson County is the second most populous county in the MSA, containing 26% of the region's population. However, the county only contains 11% of the region's subsidized affordable housing supply. Williamson County has the second-lowest number of affordable units per 100 households, with only 3.8 subsidized affordable units per 100 households.
  - Williamson County households experience housing cost burden at a lower rate than in any other county in the region. However, between 2021 and 2022, housing cost burden in Williamson County increased by 2%, signifying that more households are struggling to pay for housing costs in the County than they were a year ago.
  - Likewise, Williamson County contains the highest median family income and lowest poverty rate out of all five counties in the MSA. However, Williamson was one of only 2 counties (Hays County as the other) where the poverty rate increased from 2021 to 2022, with 2,741 more Williamson County households (a 0.24% increase) falling below the poverty line in 2022.
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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

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- **SOURCE 1:** United States Census Bureau, 2017-2021 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 2023
  - Texas Department of Housing & Community Affairs, Accessed 2023
  - National Low Income Housing Coalition and Public and Affordable Housing Research Corporation, Accessed 2023
  - Housing Authority of the City of Austin, Accessed 2023
  - Housing Authority of Travis County, Accessed 2023
  - Travis County Housing Finance Corporation, Accessed 2023
  - United States Department of Housing and Urban Development, Accessed 2023
  - Various county housing resources.
  - Precinct Analysis based on methodology 3.
- **SOURCE 3:** Austin Investor Interests, Q4 2022, , Precinct Analysis based on methodology 2; Austin Board of Realtors (ABOR), Calendar Year 2022, Precinct Analysis based on methodology 2; United States Census Bureau, 2017-2021 5-Year American Community Survey. Precinct Analysis based on methodology 1.
- **SOURCE 4:** United States Census Bureau, 2017-2021 5-Year American Community Survey. Precinct Analysis based on methodology 1.
- **SOURCE 5:** United States Census Bureau, 2017-2021 5-Year American Community Survey. Precinct Analysis based on methodology 1.
- **SOURCE 6:** Ending Community Homelessness Coalition (ECHO) Point-in-Time Count 2023; Texas Homeless Network (Hays and Williamson Counties), Point-in-Time Count 2023.
- **SOURCE 7:** United States Census Bureau, 2017-2021 5-Year American Community Survey. Precinct Analysis based on methodology 1.
- **SOURCE 8:** United States Census Bureau, 2017-2021 5-Year American Community Survey. Precinct Analysis based on methodology 1.
- **SOURCE 9:** Capital Metropolitan Transit Authority, Accessed 2023; 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.



# TRAVIS COUNTY AT A GLANCE

AFFORDABLE HOUSING 2022

## DEMOGRAPHICS 1

34.9

MEDIAN AGE

### RACE/ETHNICITY



- 48% White
- 34% Hispanic/Latino
- 8% Black/African American
- 7% Asian
- 3% Other

## SUBSIDIZED HOUSING 2



7,687

SUBSIDIZED HOUSING UNITS OUTSIDE OF AUSTIN CITY LIMITS

4,675 EXISTING SUBSIDIZED UNITS OUTSIDE OF AUSTIN CITY LIMITS

3,012 PLANNED SUBSIDIZED UNITS OUTSIDE OF AUSTIN CITY LIMITS

58,150 TOTAL SUBSIDIZED HOUSING UNITS IN TRAVIS COUNTY INCLUDING THE CITY OF AUSTIN

## COST OF LIVING 3



\$1,705

AVERAGE RENT PER MONTH

MEDIAN FAMILY INCOME \$108,852



\$570,000

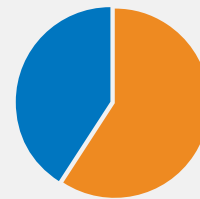
MEDIAN HOME PRICE

## RENTER VS. OWNER 4

41%

RENTERS

508,312



59%

HOMEOWNERS

733,843

## SENIOR POPULATION 5



9.8%

AGE 65+

2.7%



AGE 65+ WITH A DISABILITY

## HOMELESSNESS 6

1,266



# OF PEOPLE EXPERIENCING UNSHELTERED HOMELESSNESS

## POVERTY RATE 7



11.2%

POVERTY RATE

139,464



INDIVIDUALS BELOW POVERTY

## COST BURDENED 8

30% ARE COST BURDENED

10%

ARE EXTREMELY COST BURDENED STATE OF TEXAS

33% ARE COST BURDENED

15%

ARE EXTREMELY COST BURDENED TRAVIS COUNTY

## TRANSIT CHOICES 9



37%

PERCENT OF SUBSIDIZED UNITS WITHIN A FIVE MINUTE WALK OF HIGH FREQUENCY TRANSIT

AVERAGE ANNUAL MASS TRANSIT TRIPS PER HOUSEHOLD

143



15,743

AVERAGE ANNUAL VEHICLE MILES TRAVELED PER HOUSEHOLD

11



HousingWorks  
AUSTIN

5-County MSA Sources: Austin Board of Realtors, Austin Investor Interests, Austin Tenants' Council, Center for Neighborhood Technology, Ending Community Homelessness Coalition, National Low Income Housing Coalition, City of Austin Housing & Planning Department, Public and Affordable Housing Research Corporation, Texas Department of Housing & Community Affairs, United States Census Bureau, United States Department of Housing and Urban Development



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## Methodology

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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.



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## 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 extremely 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 include 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.
- **Unsheltered Homelessness** - People sleeping in tents, cars, abandoned buildings, and other places not meant to live in.

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## LIMITATIONS

- 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.
- 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 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.

- Potential undercounting of people experiencing homelessness: The Point in Time counts included in the Homelessness sections of our County and Precinct Analyses represent the number of individuals experiencing unsheltered homelessness on a given night in January. HUD requires that Continuums of Care (ECHO is the lead agency for the CoC in Austin/Travis County) conduct an annual or biennial count of people experiencing homelessness on a single night in January to determine the allocation of federal funding to address community needs. However, due to the specific requirements HUD mandates for counting someone as experiencing homelessness during the PIT, there are a number of limitations to the PIT count that likely result in an undercount, including but not limited to issues such as:
  - To count an individual as experiencing unsheltered homelessness, they must be seen and therefore some hard-to-reach individuals may not be counted.
  - The PIT count also does not include people experiencing homelessness if they are in a hospital or jail during the night of the count.
  - Lastly, counts can vary considerably year-to-year due to the geography, weather, and level of volunteer engagement during a specific PIT count.

Because of these limitations, ECHO provides an alternative estimate of the number of people experiencing homelessness in Austin/Travis County on their Homelessness Response Dashboard online (at <https://www.austinecho.org/dashboard/>), which utilizes information from the intake process that various groups and organizations working to provide services to people experiencing homelessness use.

- Due to rounding, percentages represented in these graphics may not total 100%.

## ADDITIONAL RESOURCES FOR HOUSING DATA AND INFORMATION

- [HousingWorks: City Council District by District and Community at a Glance Analysis](#)
- [HousingWorks: Austin Strategic Housing Blueprint Scorecard](#)
- [Ending Community Homelessness \(ECHO\): Homelessness Response Dashboard](#)
- [Austin Board of Realtors \(ABOR\): Housing Market Statistics](#)
- [City of Austin: Affordable Housing Online Search Tool](#)
- [City of Austin: Austin/Travis County/MSA Demographics Data Hub](#)



SUPPLEMENTAL TABLES - COUNTIES

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

	Austin-Round Rock-Georgetown MSA (Total)	Austin-Round Rock-Georgetown MSA (%)	Bastrop County	Caldwell County	Hays County	Travis County	Williamson County
Total Population	2,234,300		94,887	45,286	234,573	1,267,795	591,759
Male	1,125,043	50.4%	48,496	22,942	117,029	643,169	293,407
Female	1,109,257	49.6%	46,391	22,344	117,544	624,626	298,352
Population 65+	241,526	10.8%	13,798	6,241	25,659	124,282	71,546
Population 65+ with a disability	71,031	3.2%	4,990	3,144	8,145	33,977	20,775

Source: American Community Survey (2017-21)

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

	Austin-Round Rock-Georgetown MSA (Total)	Austin-Round Rock-Georgetown MSA (%)	Bastrop County	Caldwell County	Hays County	Travis County	Williamson County
White	1,132,563	50.7%	46,767	17,151	121,011	609,580	338,054
Hispanic/Latino	730,639	32.7%	38,071	24,490	93,930	426,399	147,749
Black/African American	153,891	6.9%	6,522	2,185	8,403	99,855	36,926
Asian	136,748	6.1%	777	411	3,414	87,994	44,152
Other	80,459	3.6%	2,750	1,049	7,815	43,967	24,878

Source: American Community Survey (2017-21)