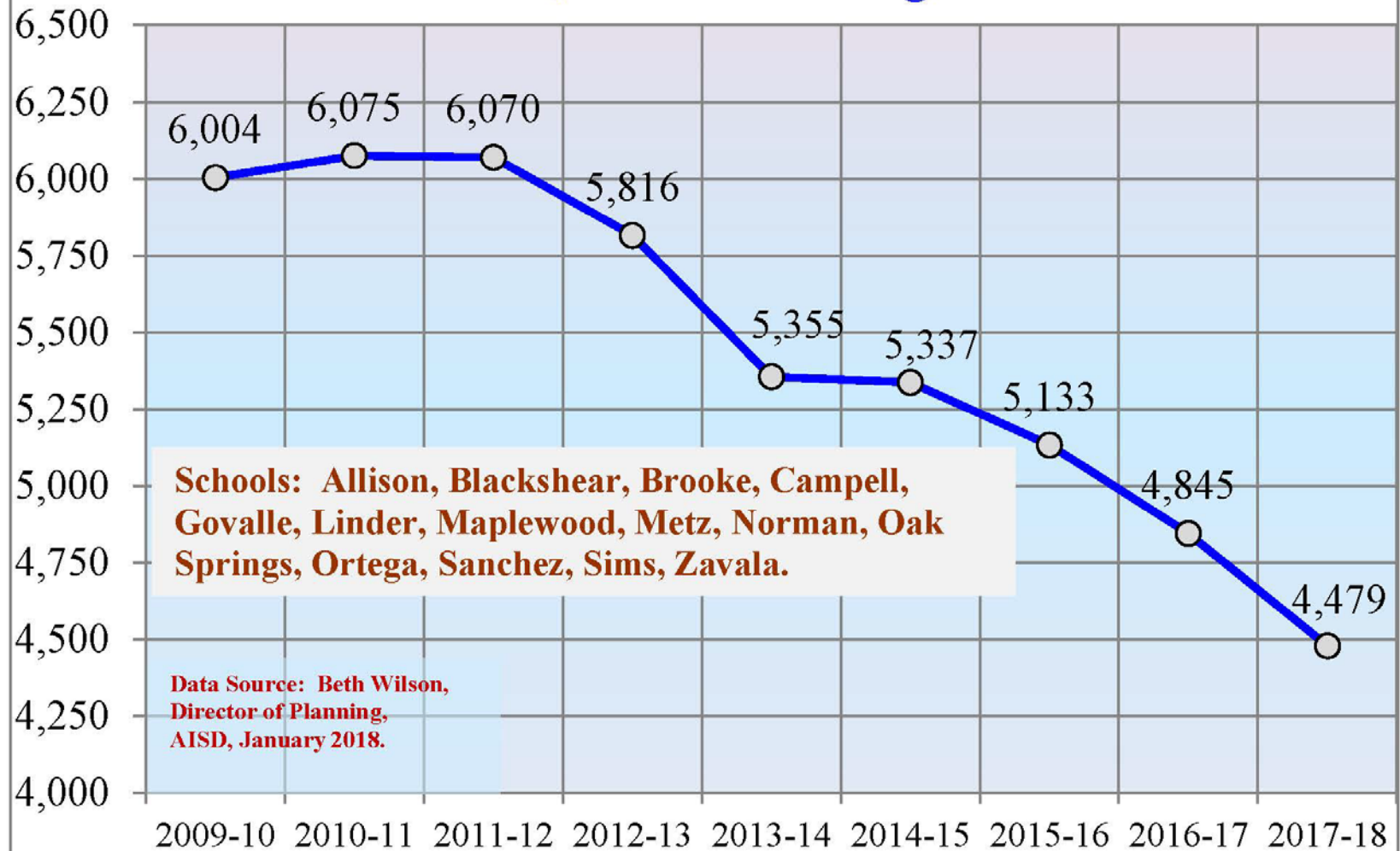


East Austin Elementary Schools: Total Enrollment, 2009-10 through 2017-18



A scenic view of a city park. In the foreground, a paved path runs along a river. Several people are on the path: a person on a bicycle, a person running, and a group of people walking. To the left, a large statue of a person in a long coat stands on a pedestal. In the background, a city skyline with several tall buildings is visible across the river. The word "Housing" is overlaid in the center of the image.

Housing

Selected Demographic Data Themes

Ryan Robinson
City Demographer
City of Austin

Selected Demographic Data Themes

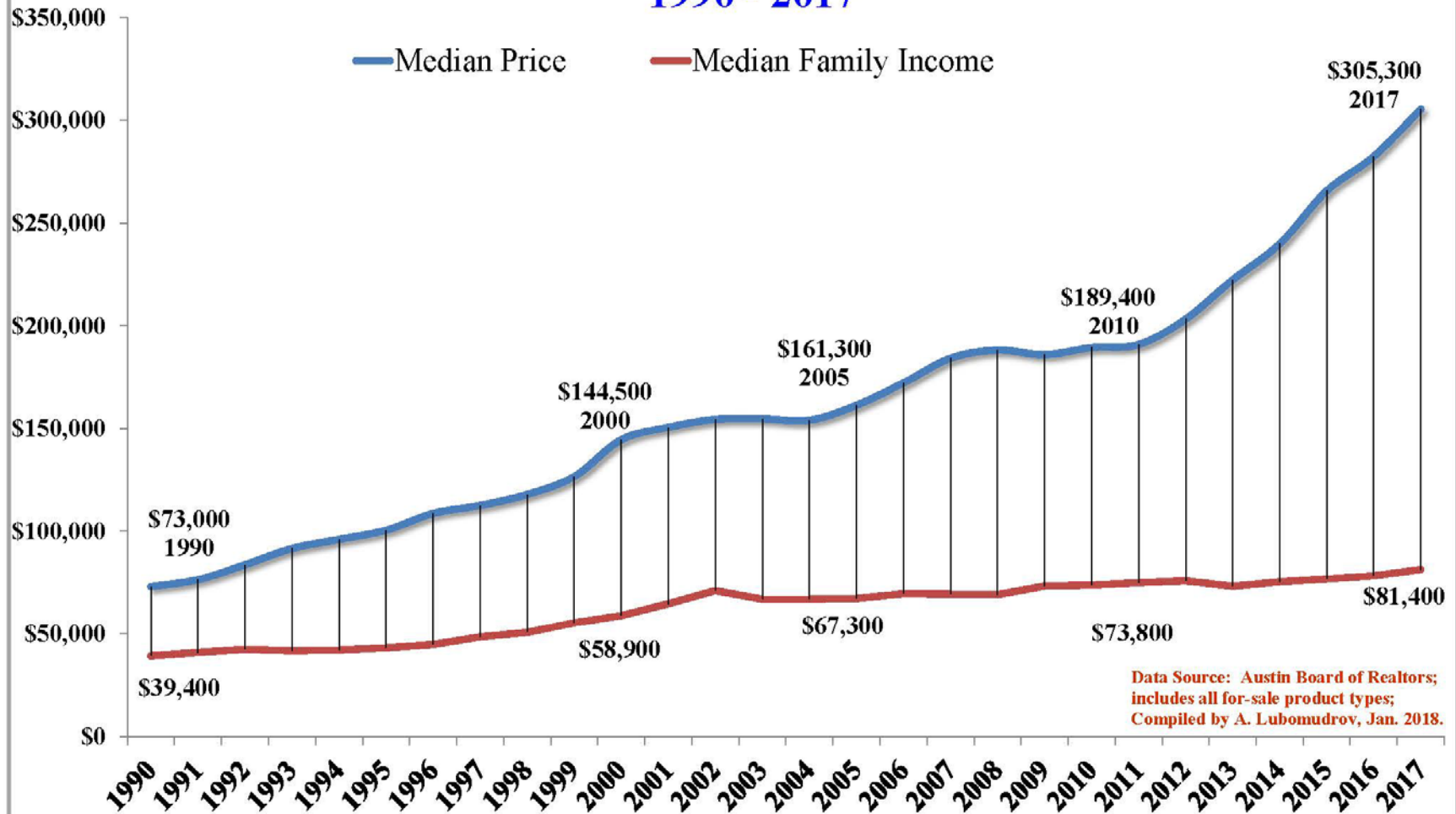
1. Population and job growth.

2. Household dynamics.

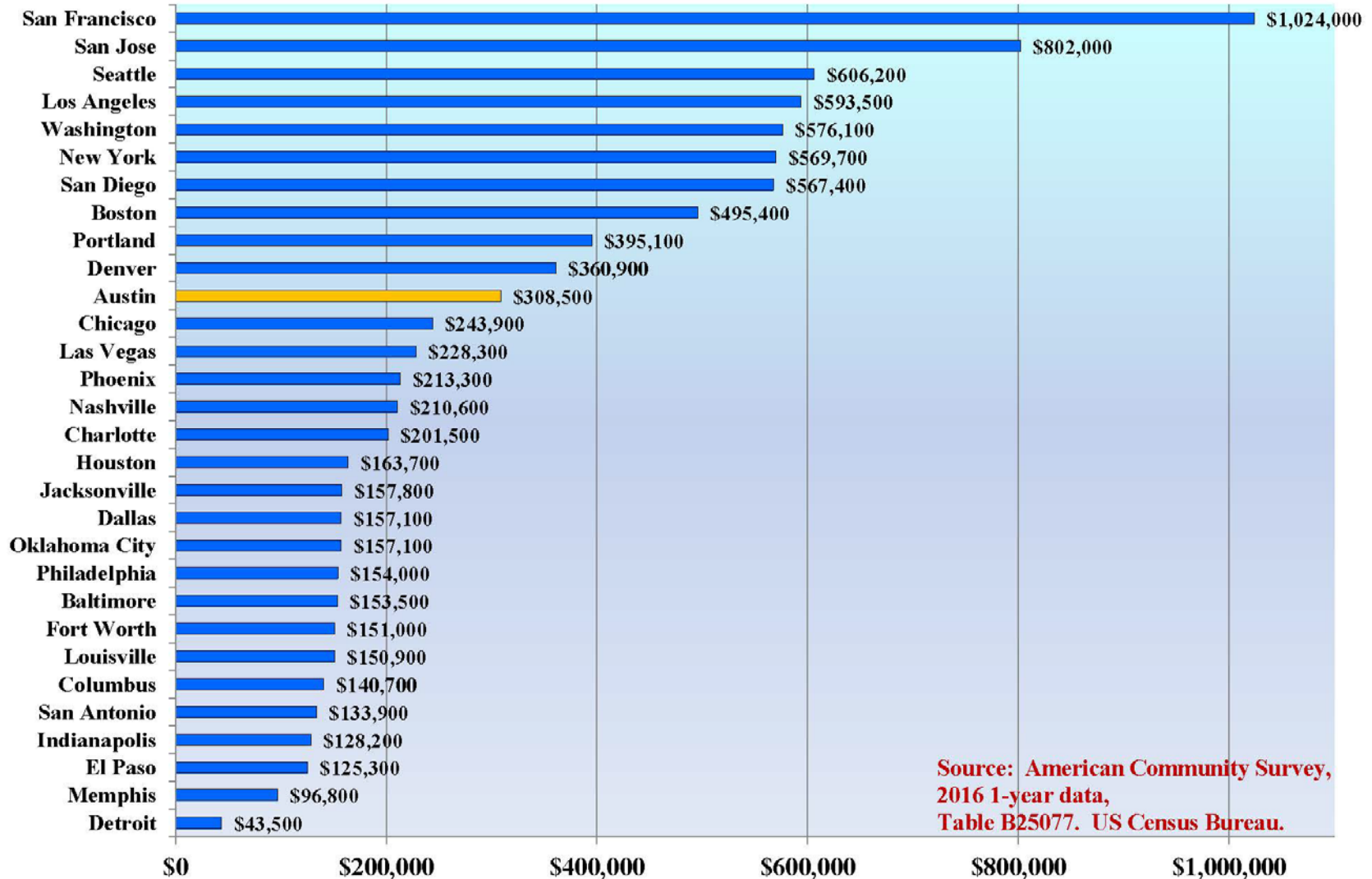
3. Housing

- Steep price increases over the past seven years
- Yet Austin remains relatively affordable when compared to more expensive coastal markets and other peer cities
- City's share of Regional Single Family starts around 20%
- Multifamily deliveries are homogeneously suited for singles and young professionals...older vs newer stock
- ADUs, lots of activity but not exactly what we intended

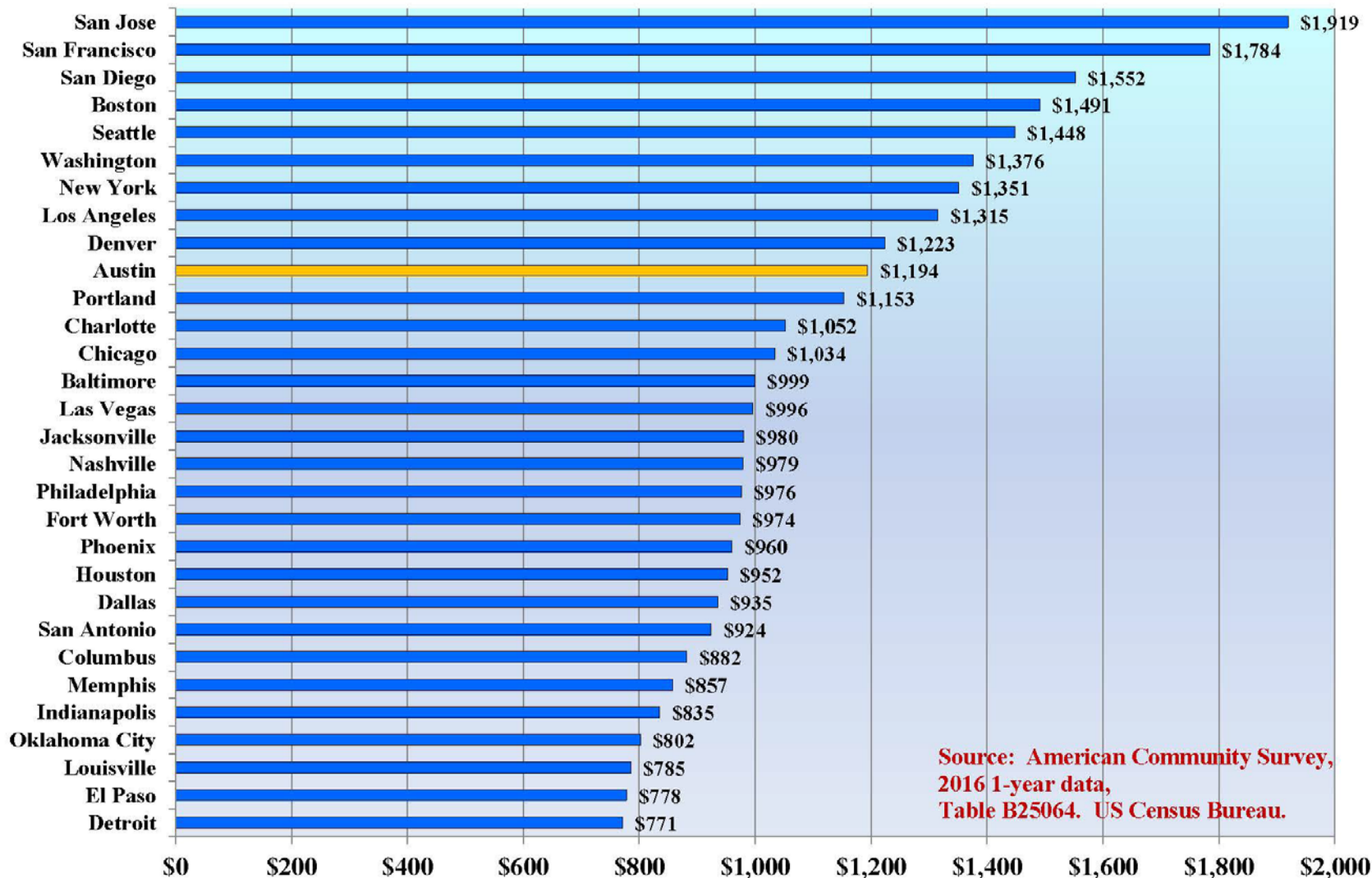
Austin Area median home prices compared with median family income 1990 - 2017



Median Value, Top 30 US Cities, 2016 ACS 1-year



Median Gross Rent, Top 30 US Cities, 2016 ACS 1-year



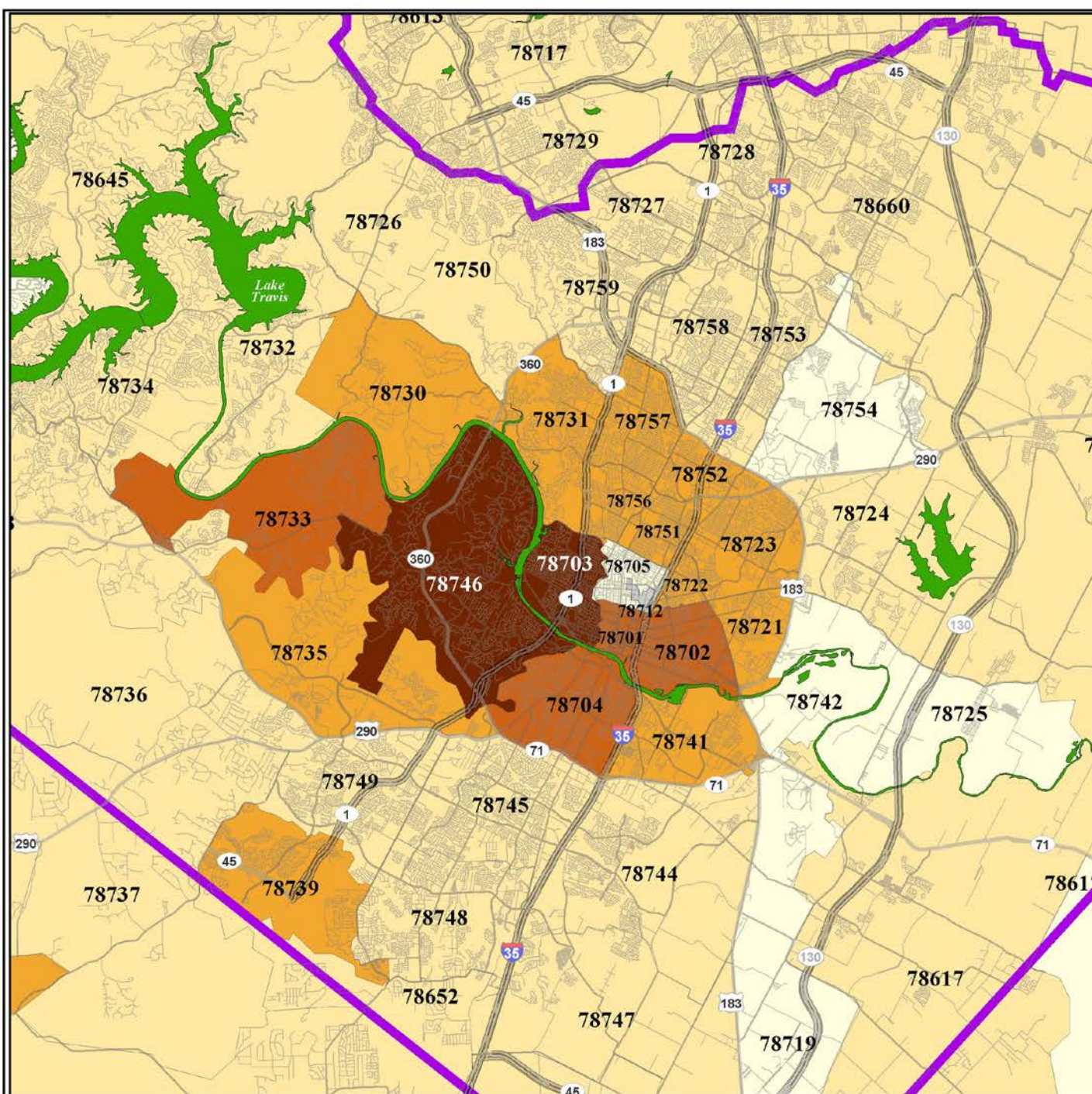
Source: American Community Survey,
2016 1-year data,
Table B25064. US Census Bureau.

Absolute Total Change in Median Sales Price of Homes by ZIP Code: 2010 to 2015

Includes all residential homesales:
Single Family Houses and Condos

DATA SOURCE:
Austin Board of Realtors.

Total Price Change

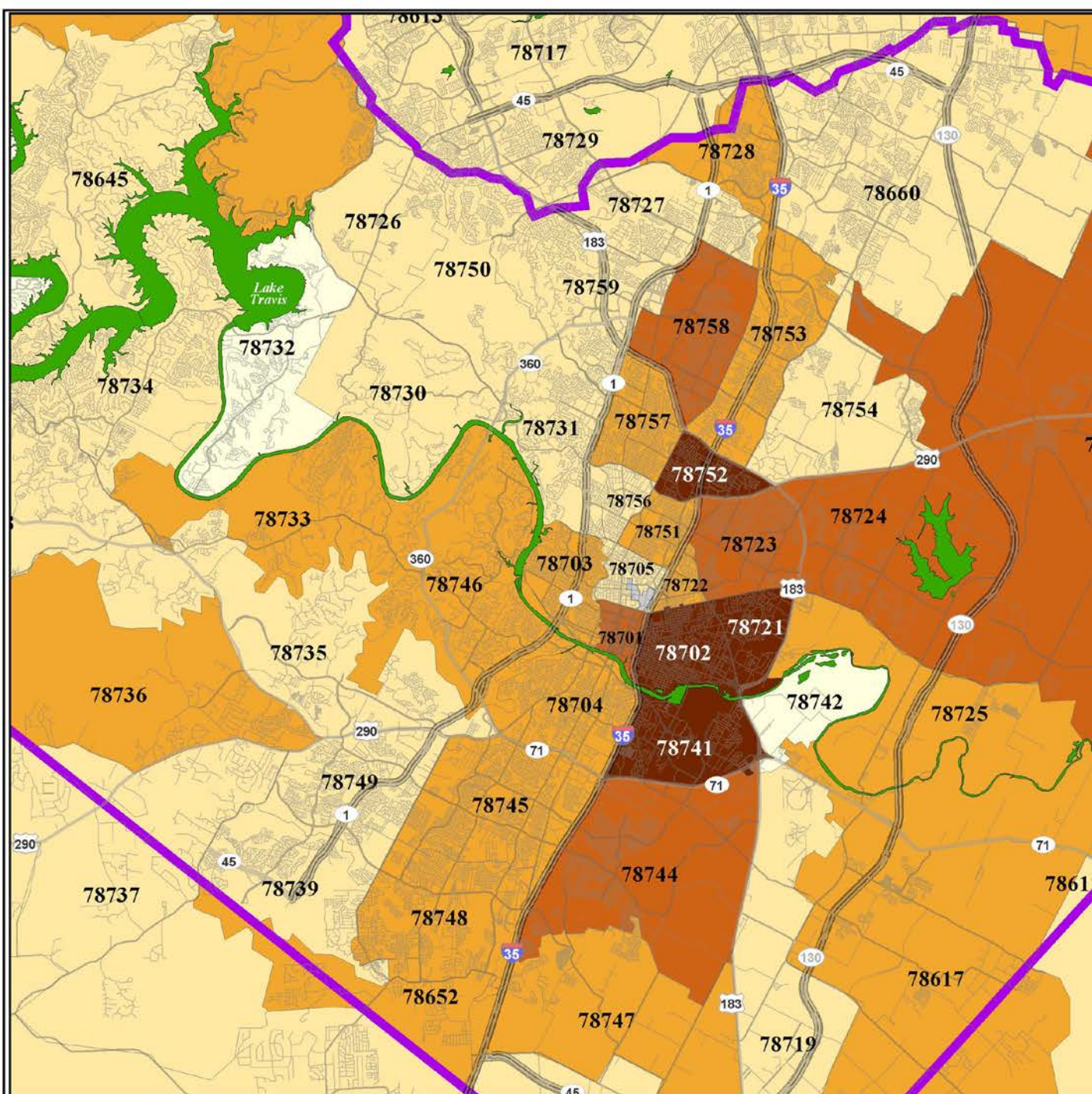
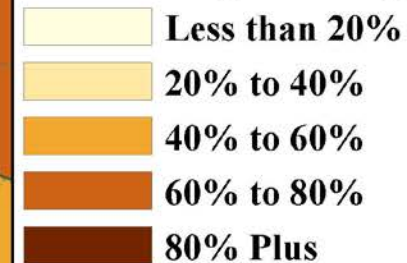


Percentage Change in Median Sales Price of Homes by ZIP Code: 2010 to 2015

Includes all residential homesales: Single Family Houses and Condos

DATA SOURCE:
Austin Board of Realtors.

Percentage Change



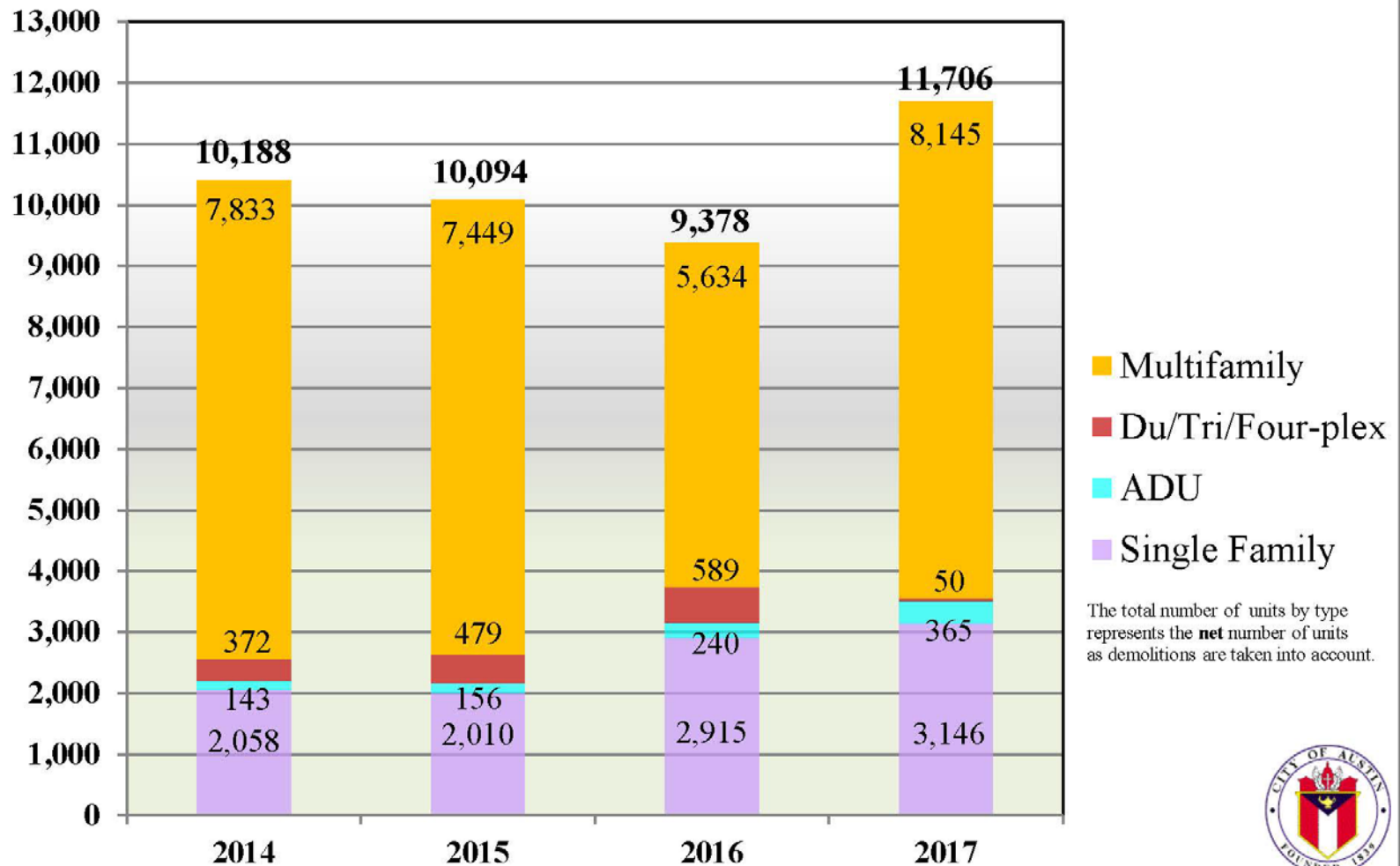


Housing Activity

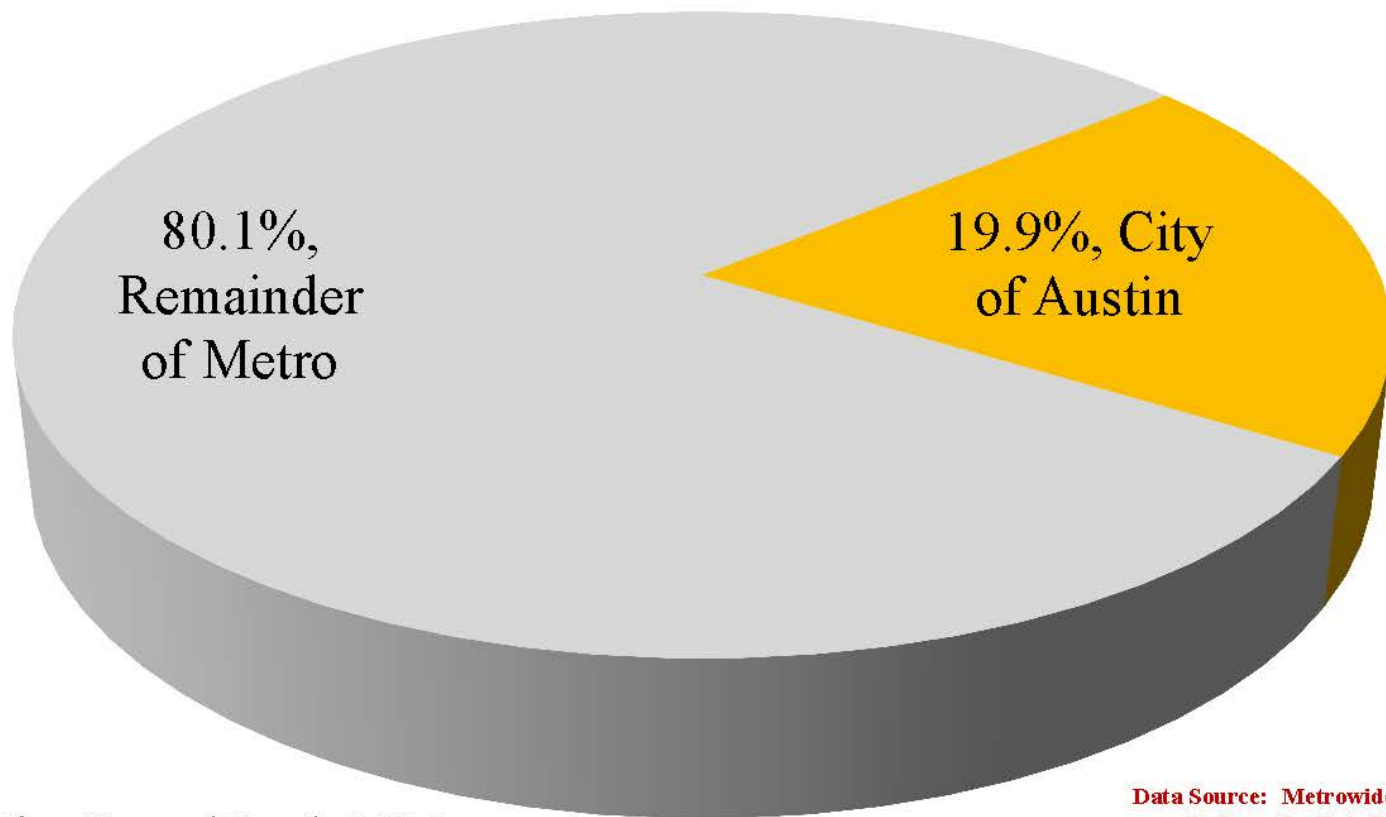
Selected Demographic Data Themes

Ryan Robinson
City Demographer
City of Austin

Net Residential Units Permitted by Type: 2014 through 2017, City of Austin



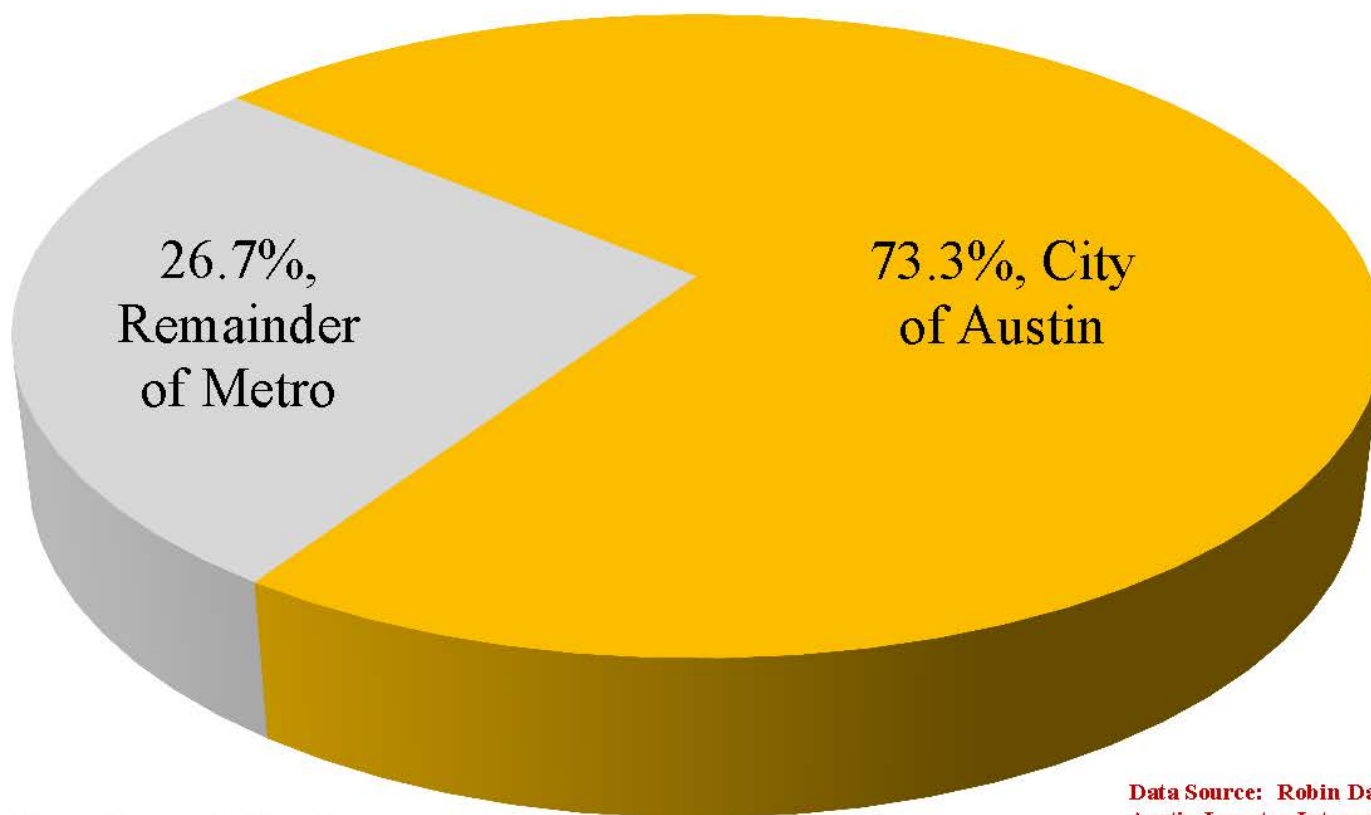
Share of Metropolitan Single Family Housing Market, 2014 through 2017 Summary



Austin--Round Rock MSA

Data Source: Metrowide permits from the Fed. Res. Bank; City permits from AMANDA.

Share of Metropolitan Multifamily Housing Market, 2017 Unit Deliveries

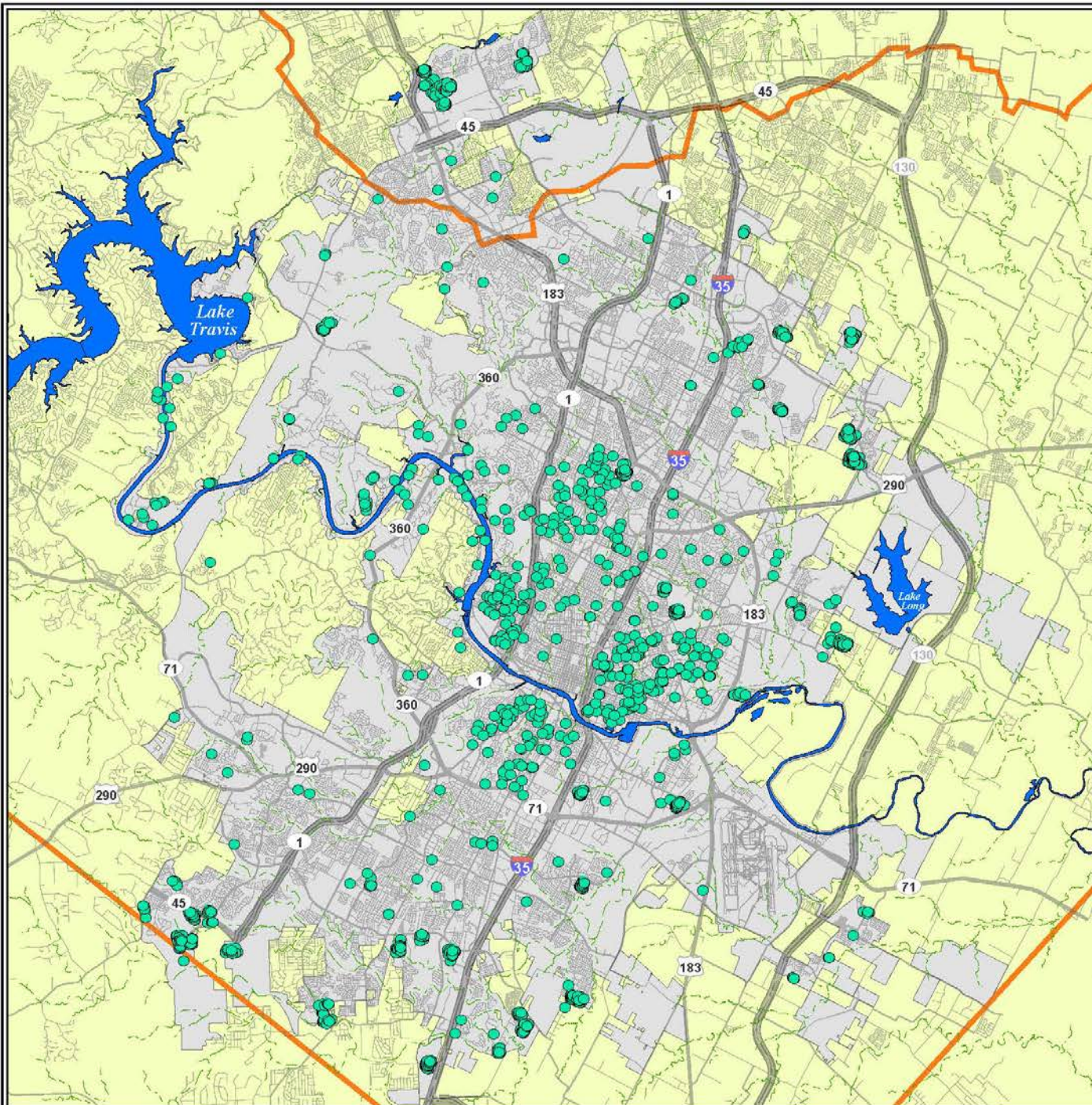


Austin--Round Rock MSA

Data Source: Robin Davis,
Austin Investor Interests;
Includes all MF product types.

Single Family Housing Activity

2014 Starts



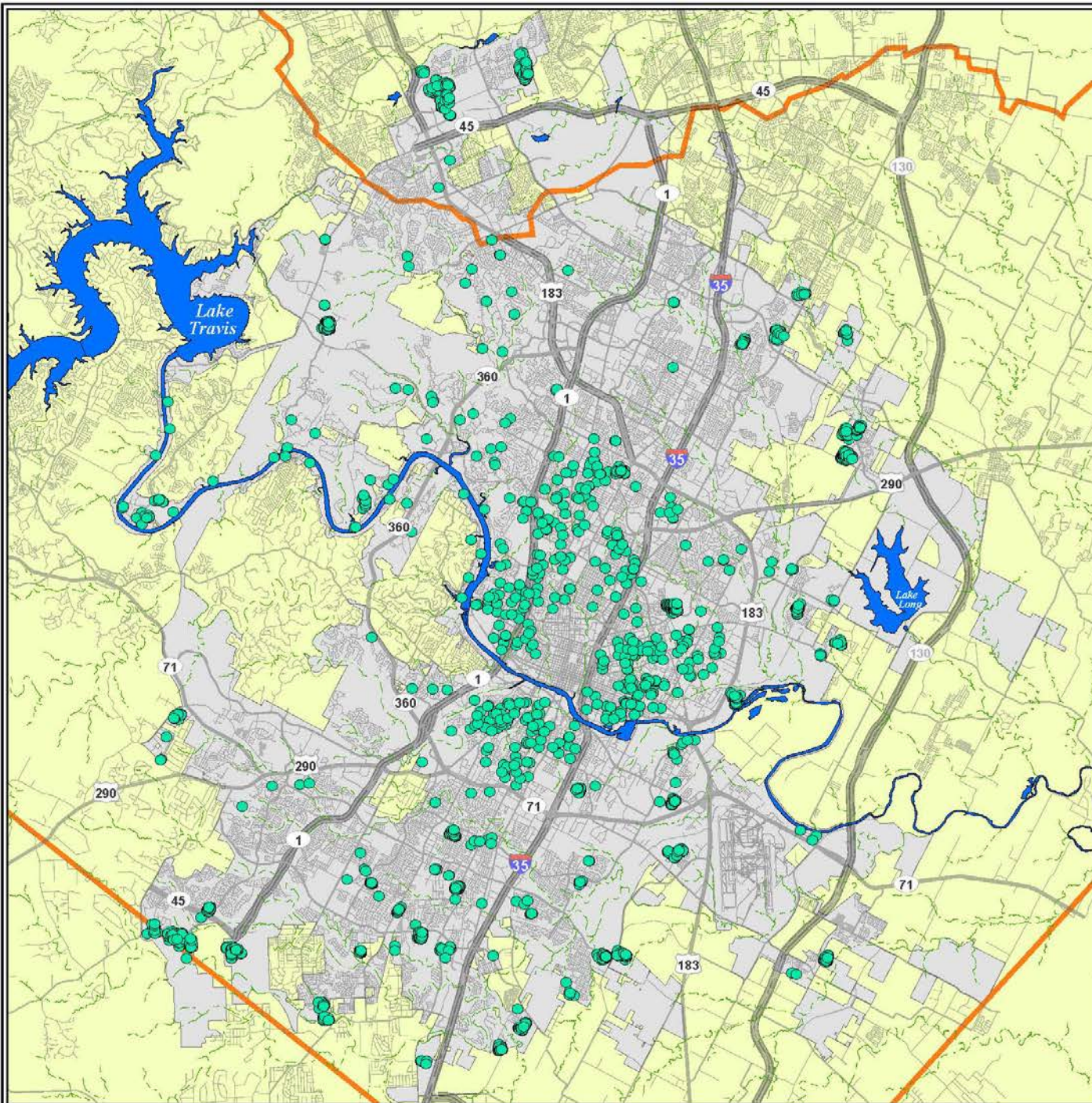
Map produced by: Ryan Robinson, City Demographer, City of Austin, January 2018.

City of Austin



Single Family Housing Activity

2015 Starts



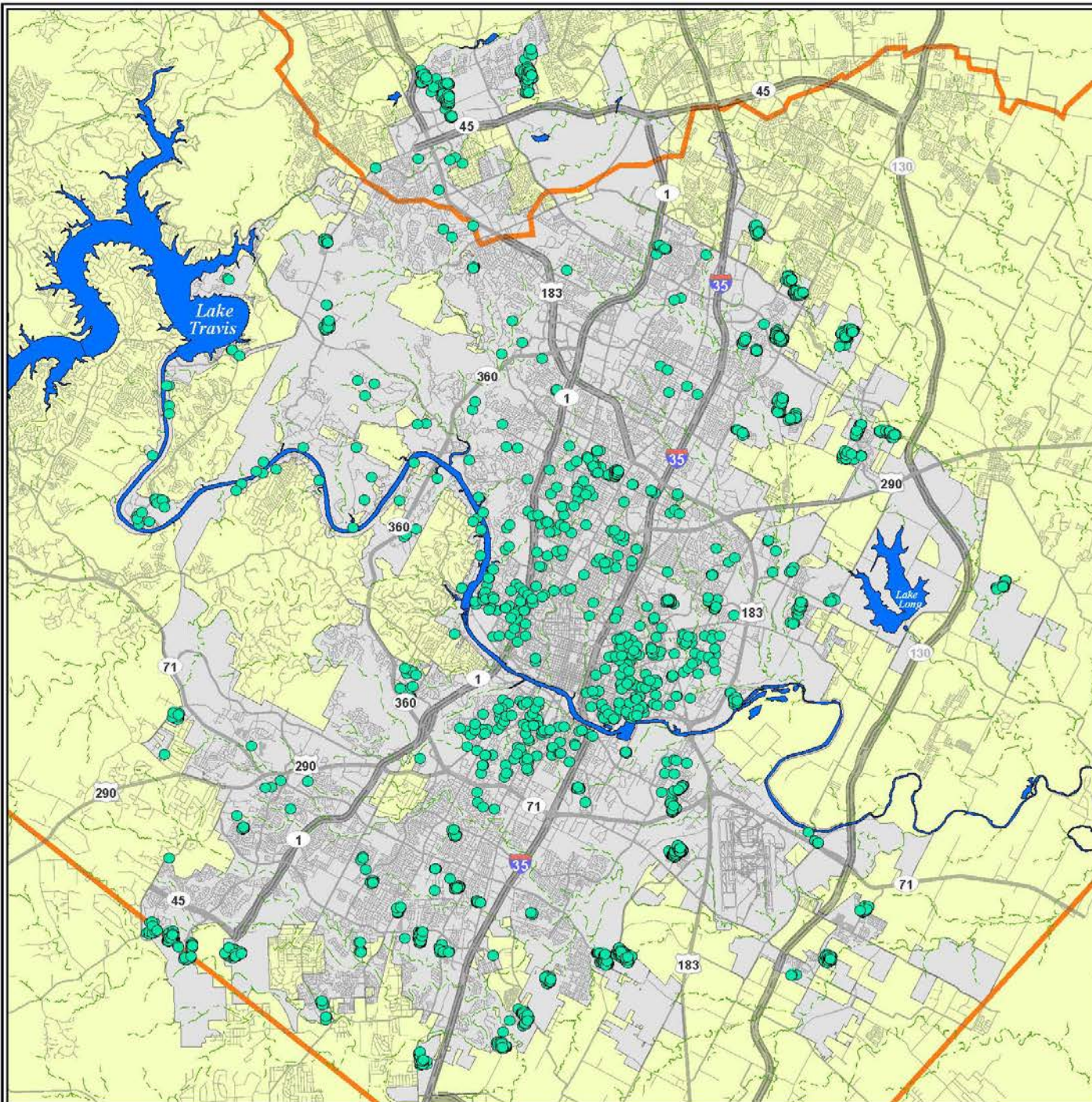
Map produced by: Ryan Robinson, City Demographer, City of Austin, January 2016.

City of Austin



Single Family Housing Activity

2016 Starts



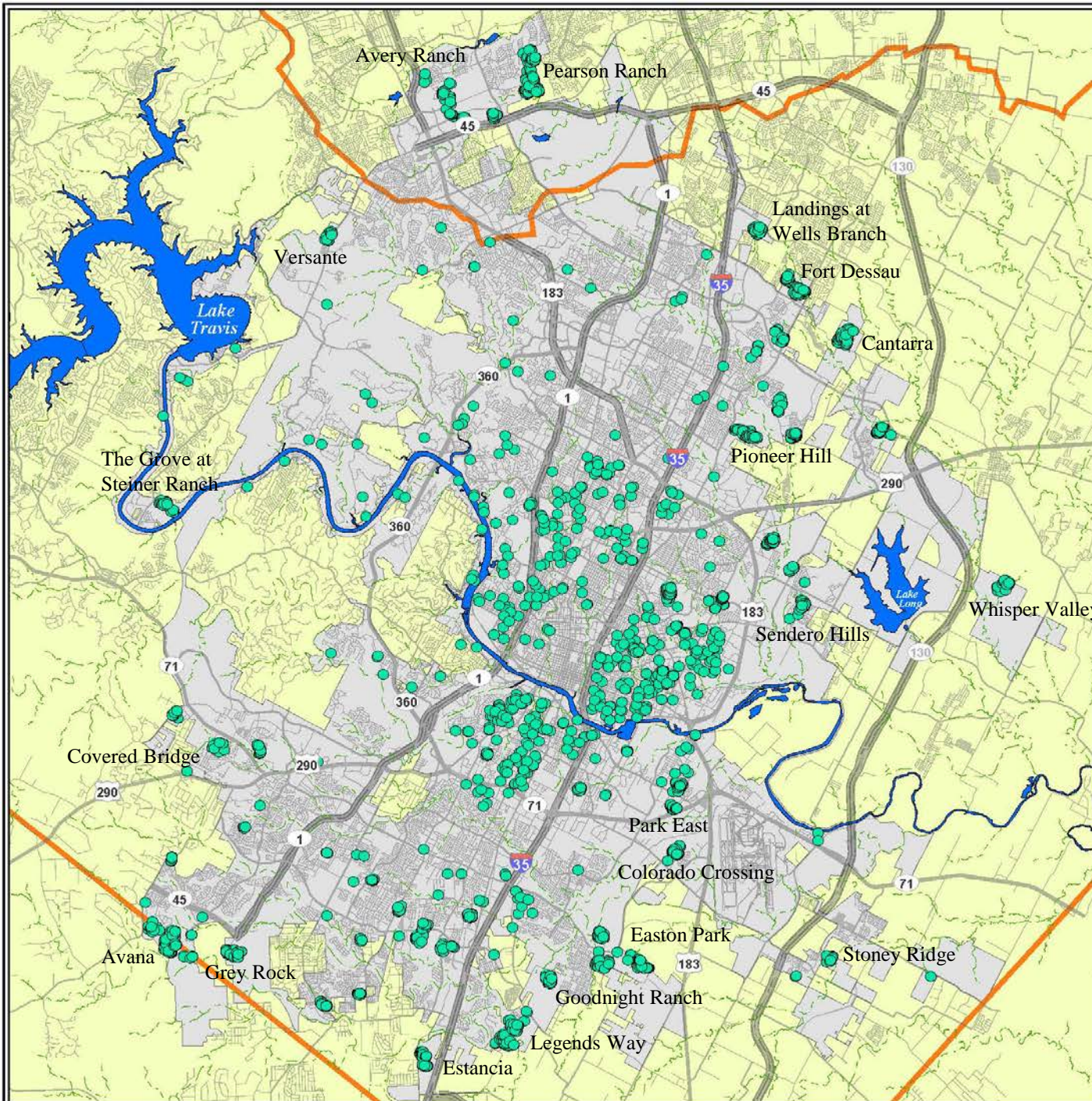
Map produced by: Ryan Robinson, City Demographer, City of Austin, January 2018.

City of Austin



Single Family Housing Activity

2017 Starts



Map produced by: Ryan Robinson, City Demographer, City of Austin, January 2018.

City of Austin

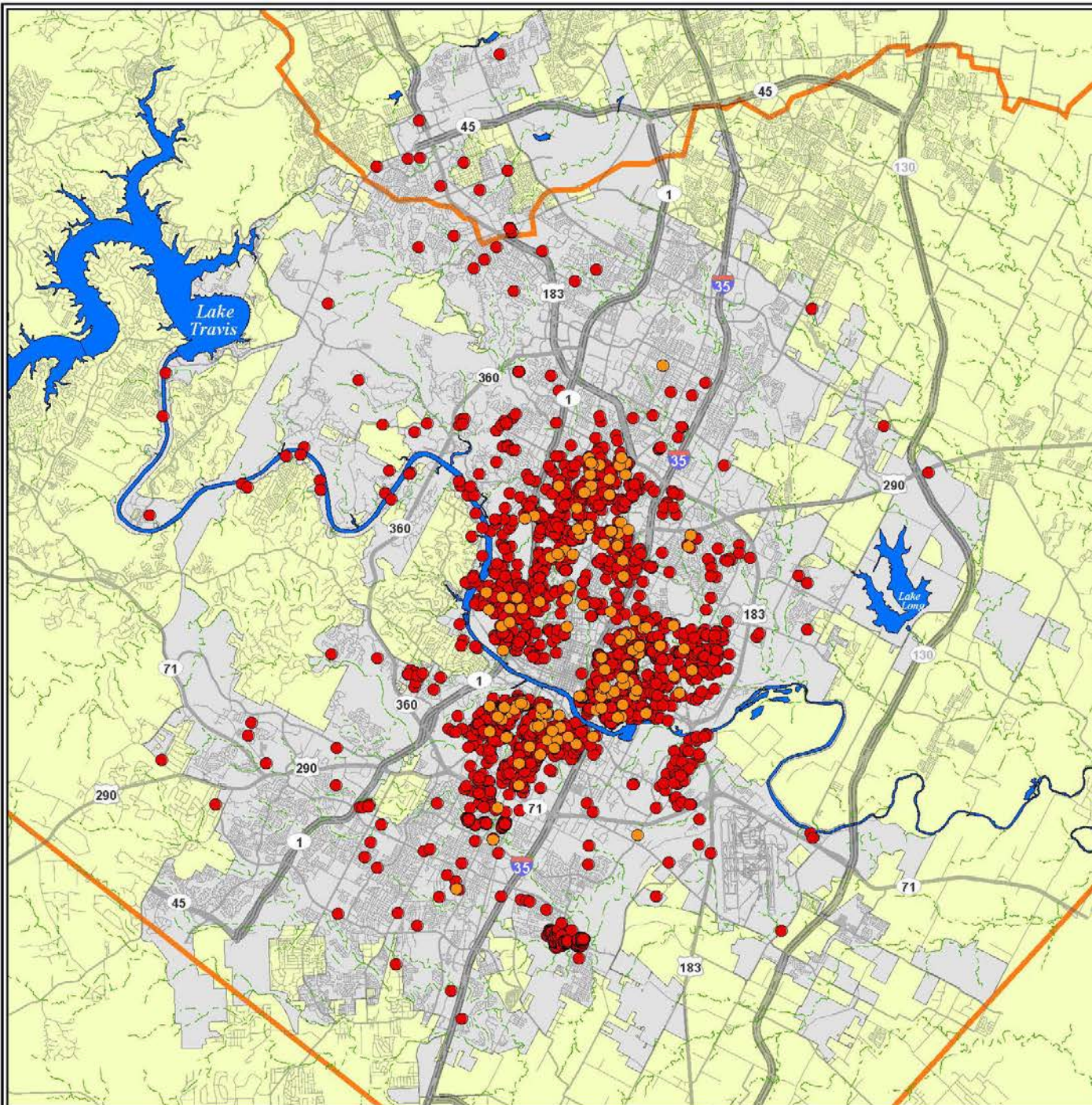


Demo Activity

2014 Through 2017

Demolitions and Move-Offs
of Single Family Structures

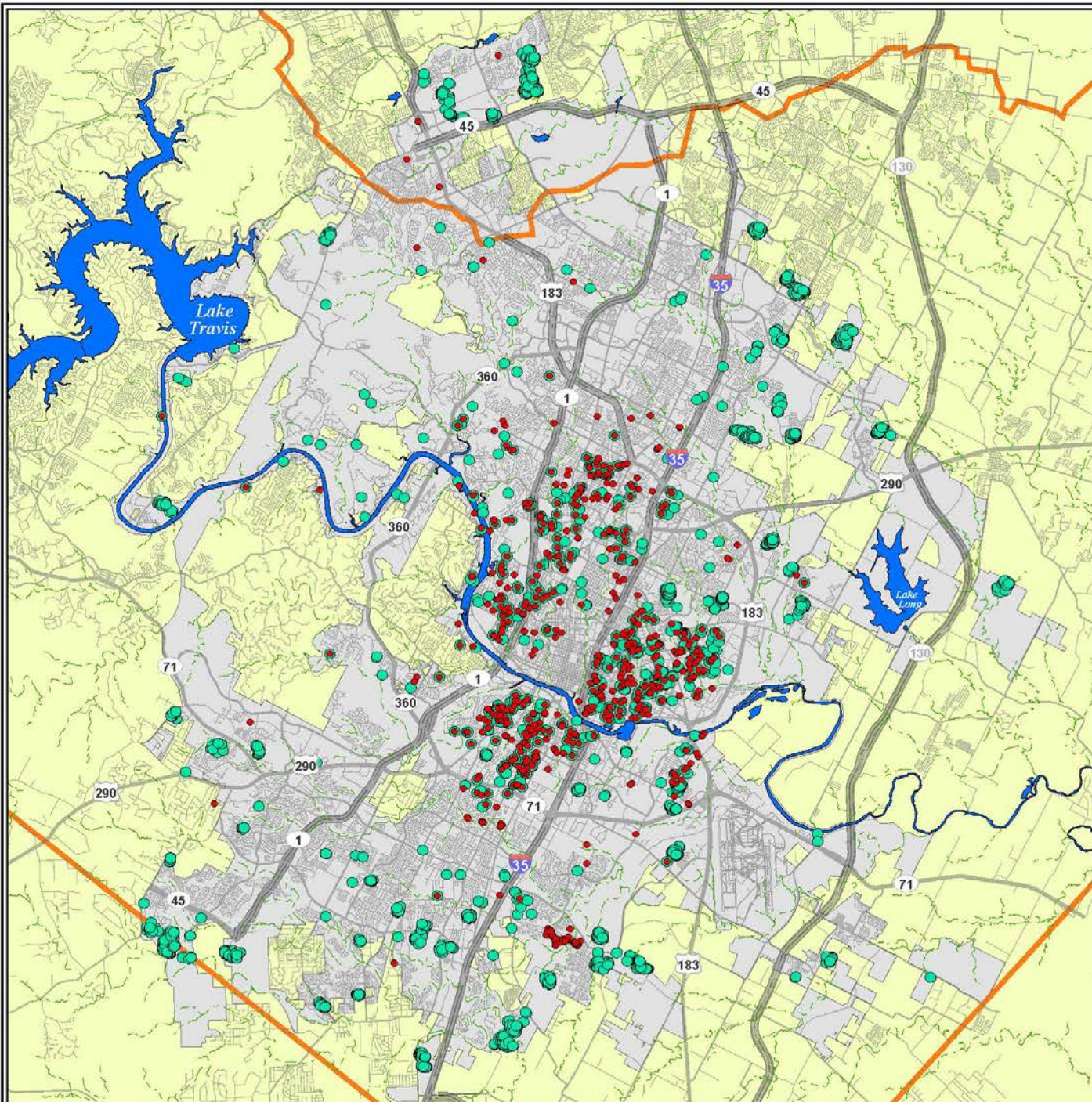
SF Demolition ● n = 2,467
Move-off ● n = 162



Single Family Housing Activity

2017 Starts

- SF Demolition
- SF Start
- SF Demo & Start



Map produced by: Ryan Robinson, City Demographer, City of Austin, January 2018.

City of Austin

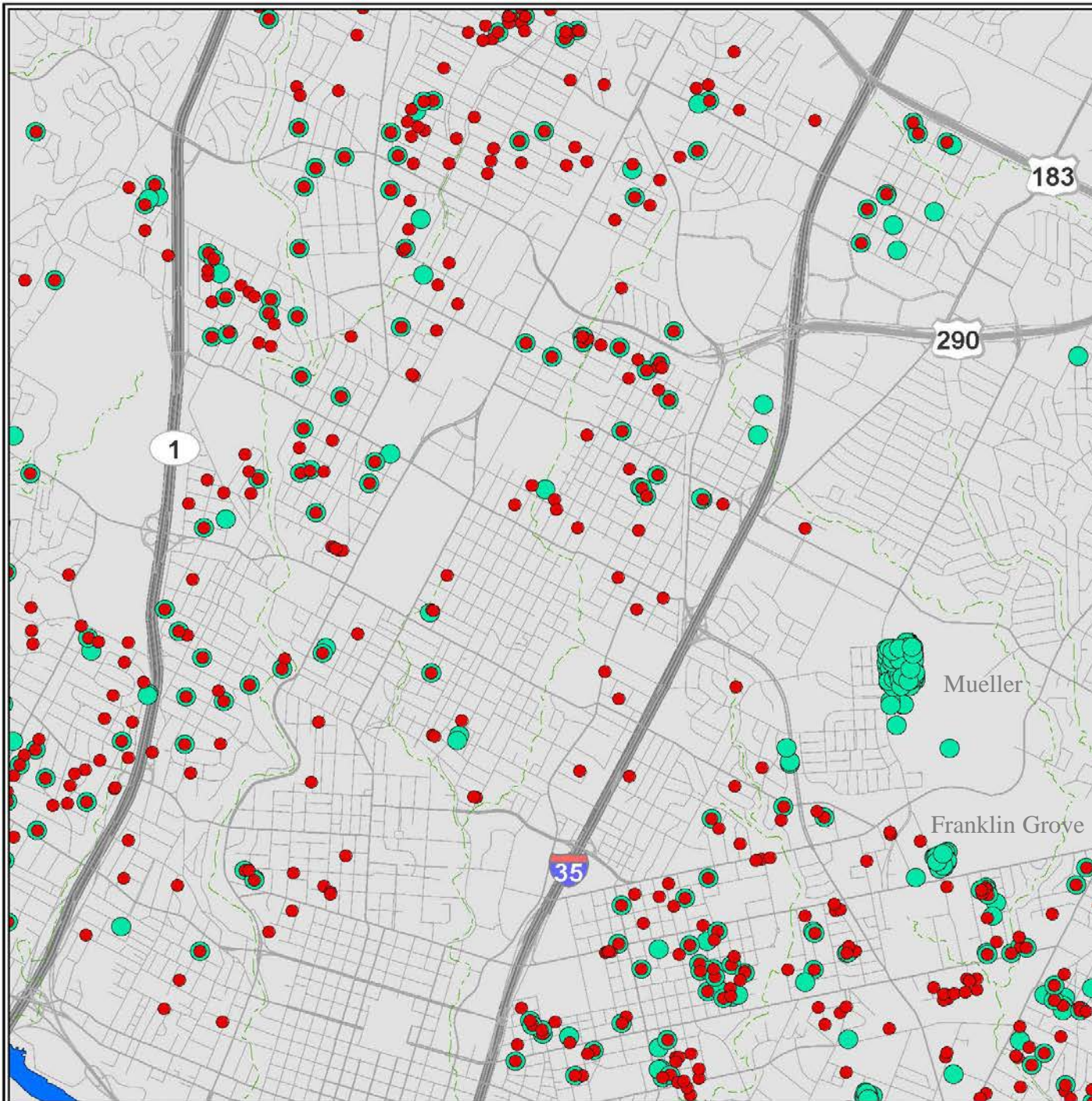


Single Family Housing Activity

north Zoom

2017 Starts

- SF Demolition
- SF Start
- SF Demo & Start



City of Austin

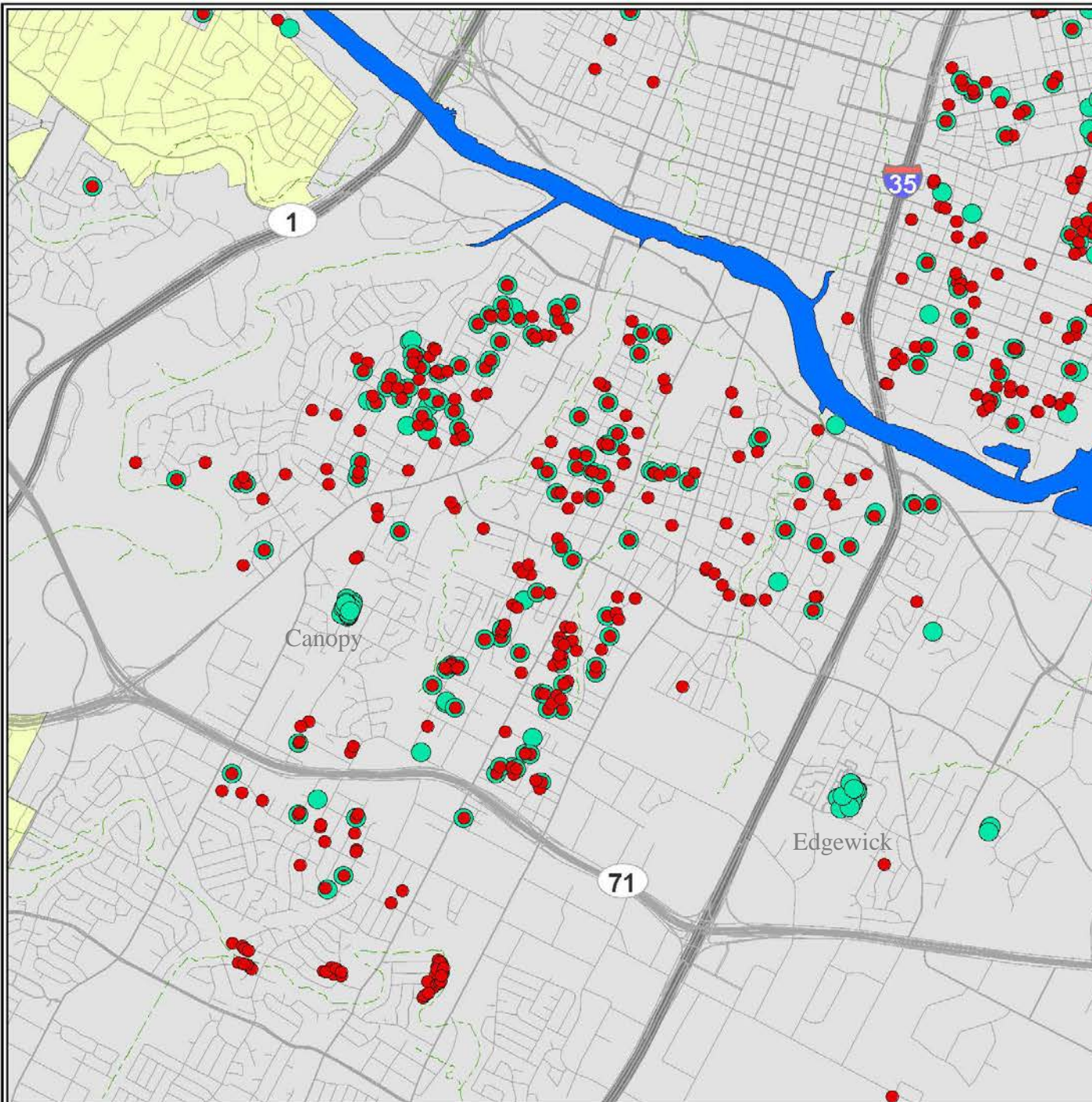


Single Family Housing Activity

south Zoom

2017 Starts

- SF Demolition
- SF Start
- SF Demo & Start



City of Austin



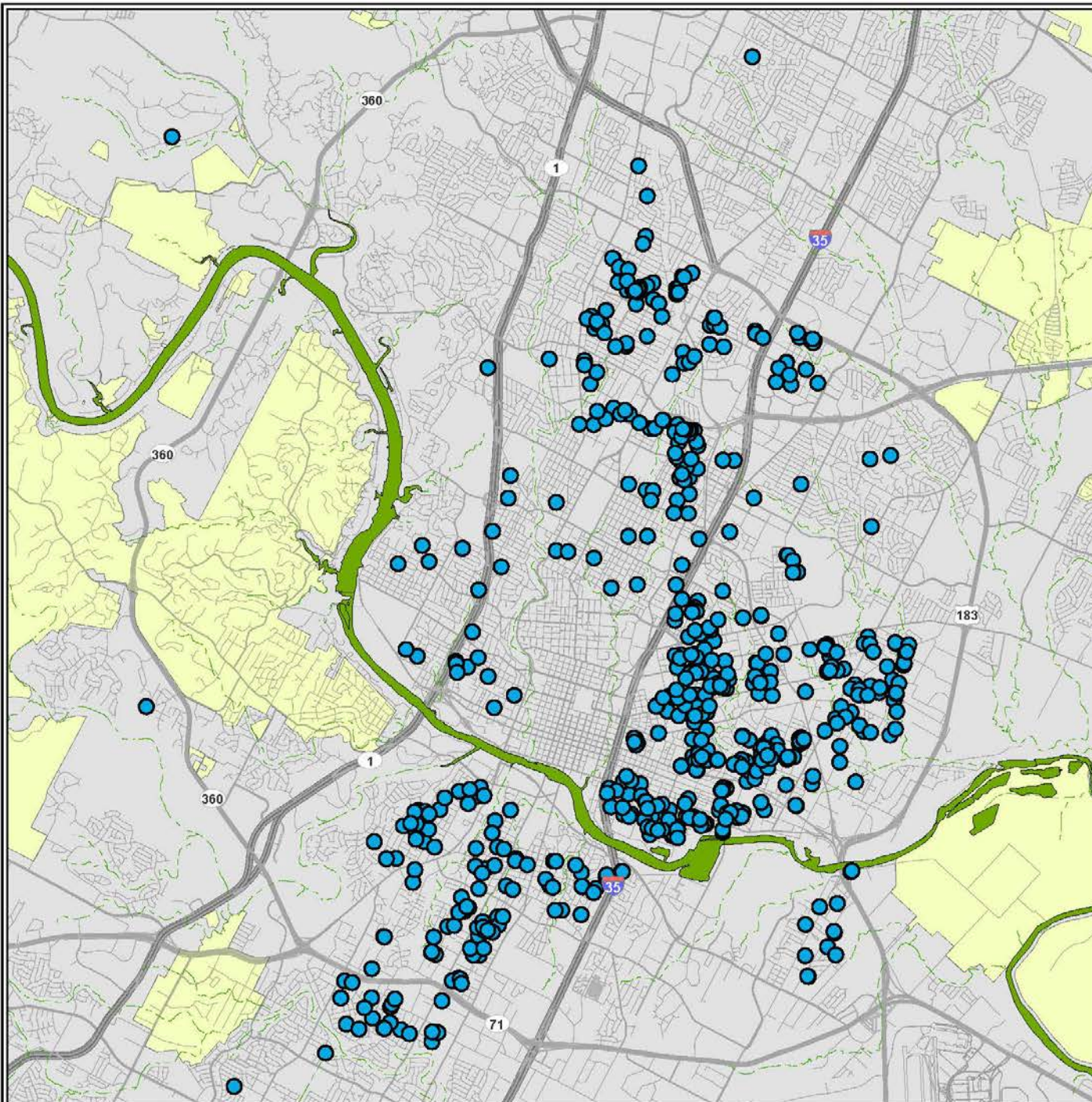
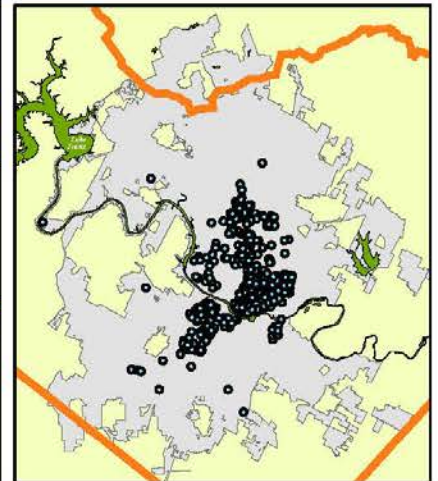
ADU Activity

November 19, 2015 through
January 8, 2018

The modified ordinance was
enacted on November 19, 2015

Accessory Dwelling Units

● = 618



Multi-Family Housing Activity

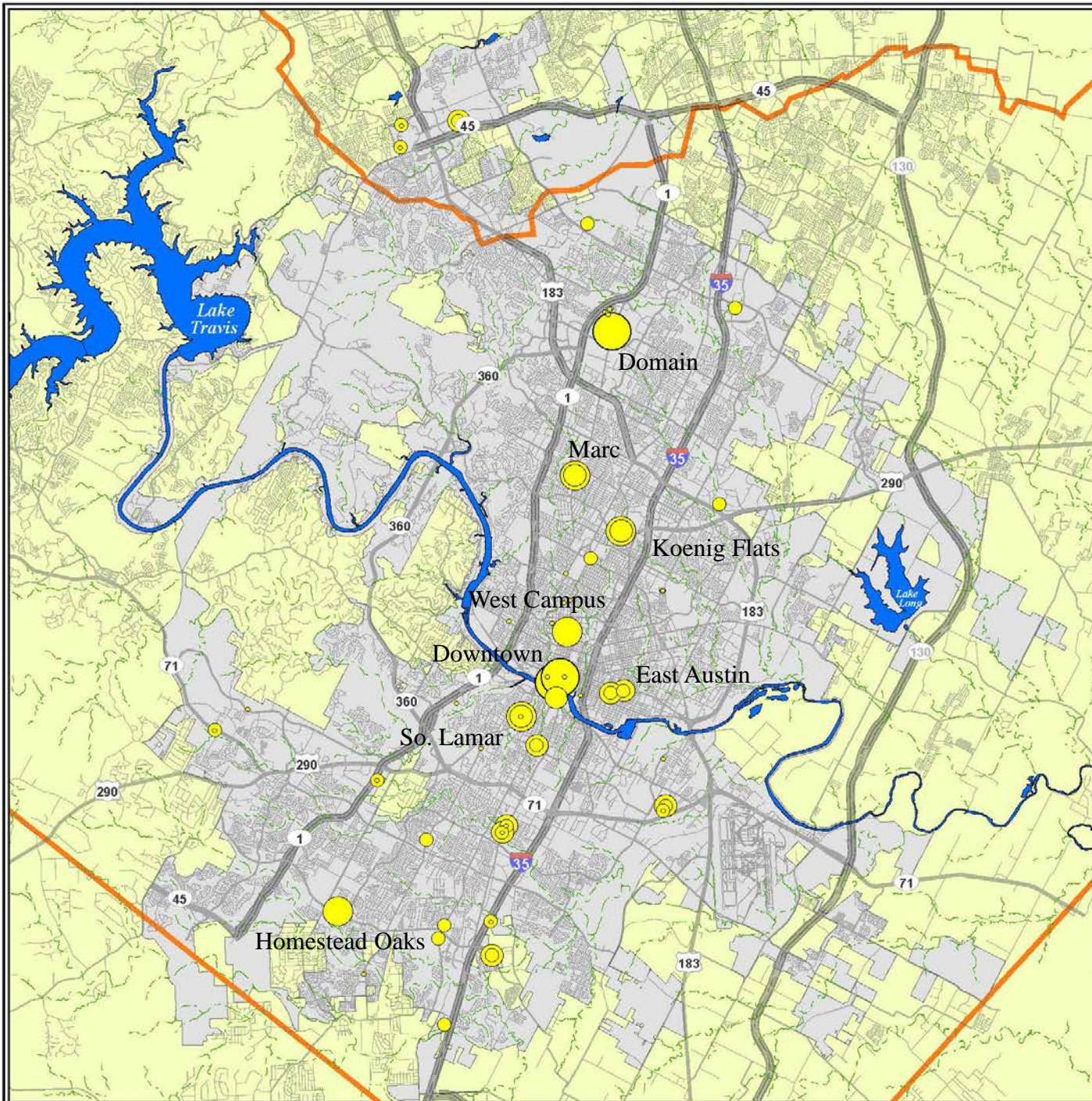
2014 Starts

Units in Project

- Fewer than 20
- 20 to 50
- 50 to 100
- 100 to 300
- 300 Plus

Net Units = 10,188

City of Austin



Multi-Family Housing Activity

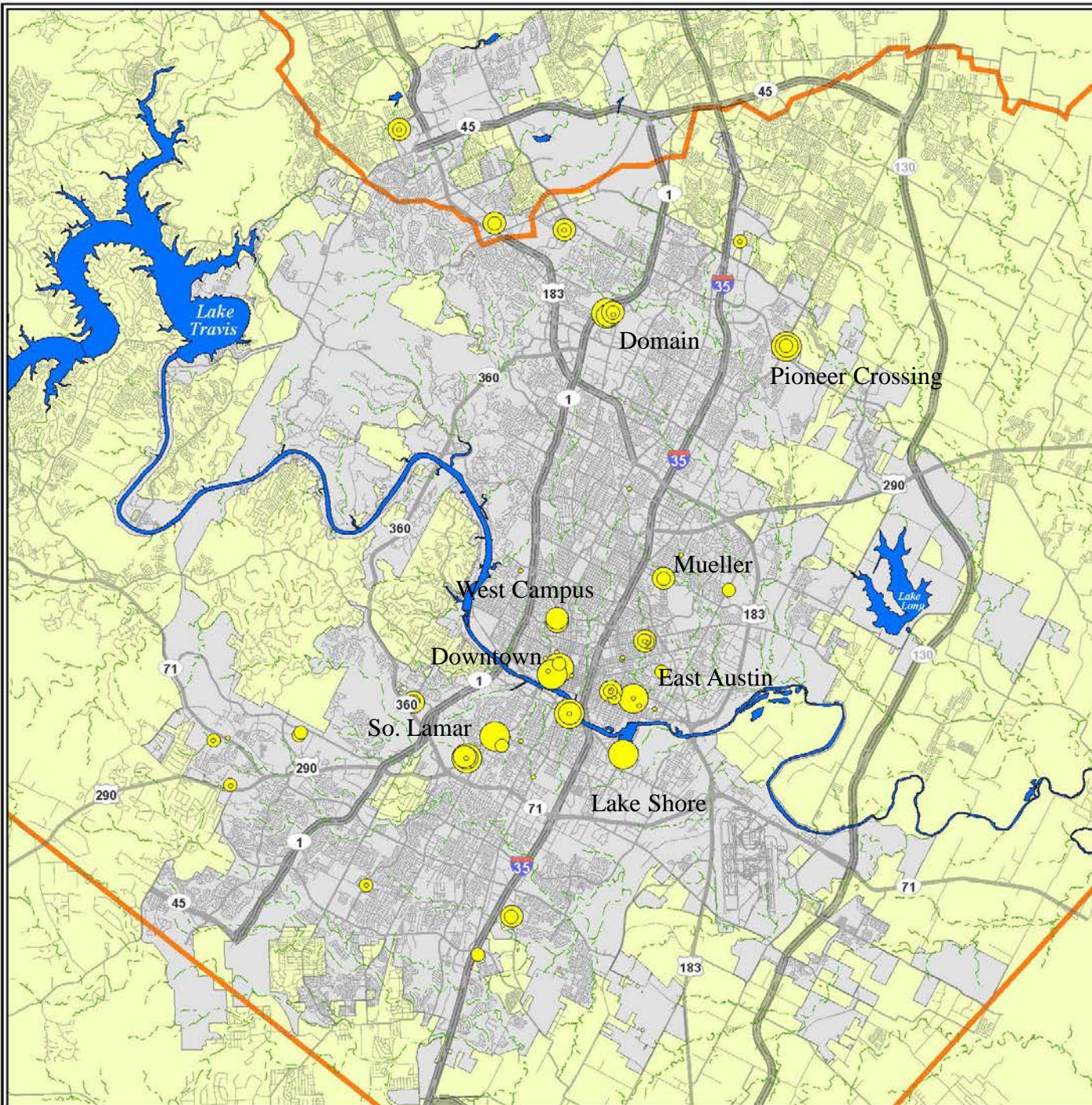
2015 Starts

Units in Project

- Fewer than 20
- 20 to 50
- 50 to 100
- 100 to 300
- 300 Plus

Net Units = 10,094

City of Austin



Multi-Family Housing Activity

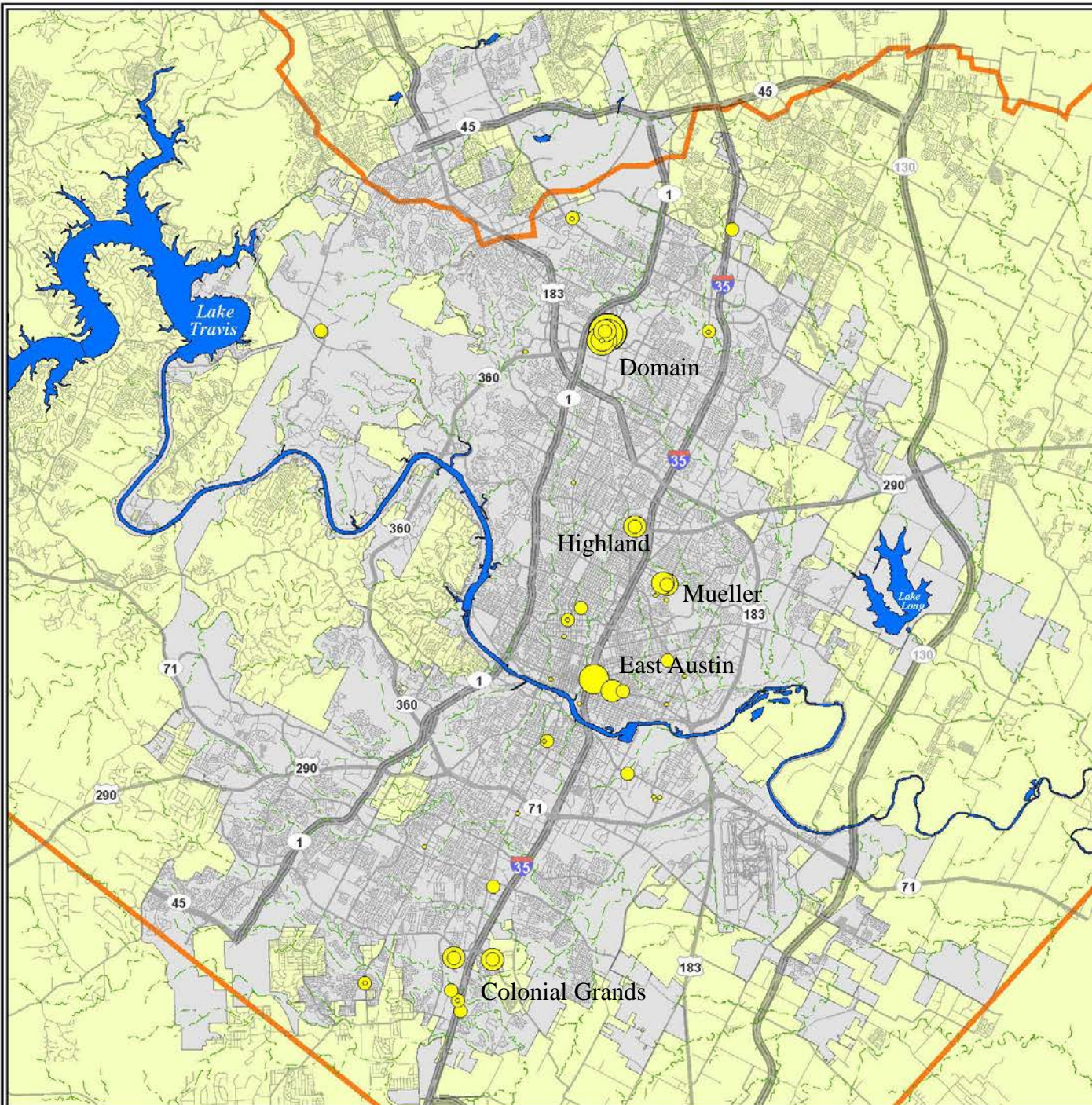
2016 Starts

Units in Project

- Fewer than 20
- 20 to 50
- 50 to 100
- 100 to 300
- 300 Plus

Net Units = 9,378

City of Austin



Multi-Family Housing Activity

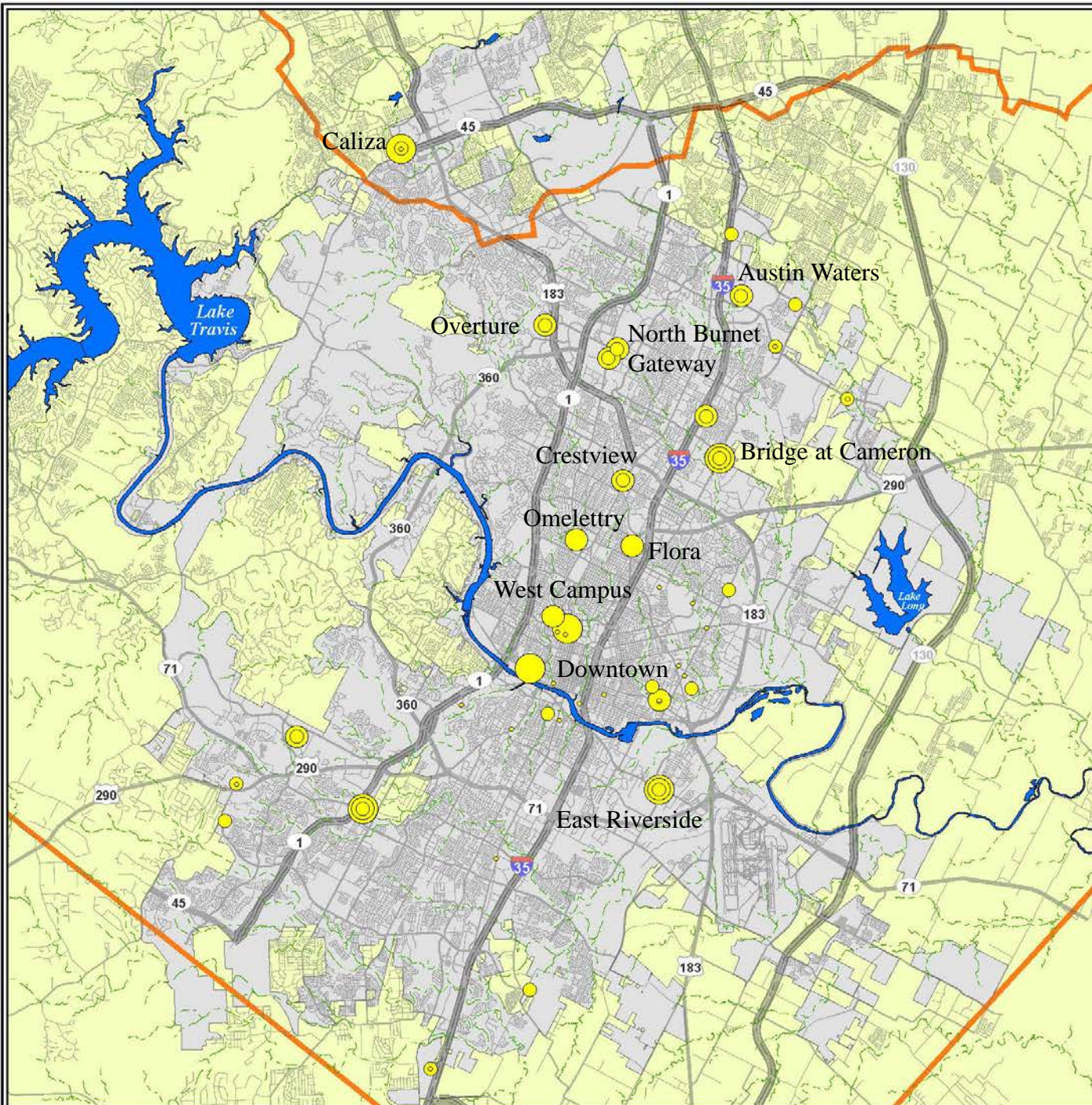
2017 Starts

Units in Project

- Fewer than 20
- 20 to 50
- 50 to 100
- 100 to 300
- 300 Plus

Net Units = 11,706

City of Austin





If Austin continues along the Imagine Austin population growth trajectory...
How much housing does Austin need into the future? Over the next 10 years?

Population Increment / Household Size = Units Needed...

(Using the Imagine Austin Population and Jobs Forecast)

- City of Austin ~ 75K to 80K (roughly 180K population increment)
- Imagine Austin Study Area ~ 95K to 100K (230K pop increment)
- Austin—Round Rock MSA ~ 270K to 280K (700K pop increment)

Caveats:

- Account for fluctuations in Vacancy Rate
- Enormous variation within Overall Household Size
- Market conditions and Constraints

Selected Demographic Data Themes

Ryan Robinson
City Demographer
City of Austin

