

# Rental Housing Needs Assessment

**City of Dallas**

Spring 2023

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HR&A

Dear Reader,

On behalf of the Child Poverty Action Lab and our collaborators at HR&A Advisors, we are excited to release a Rental Housing Needs Assessment for the City of Dallas. The document that follows provides a foundational analysis of the mismatch between rental housing supply and demand for low-income households as well as factors driving the supply gap. At CPAL, we hold two ideas in tension: (1) it's easier to identify a problem than to solve it *and* (2) a well-defined problem is half the solution. This report is intended to better define a series of problem statements so that we might break apart a complex issue (housing affordability) into discrete, actionable components. From here, we hope to work with stakeholders in government, real estate, community development, philanthropy, and more to collectively address the challenges the report makes plain.

Here are a few key findings from the report:

- The City of Dallas has a **33,660 rental unit supply gap** for its lowest-income households making at or below 50% Area Median Income (AMI), which is \$44,500 for a family of four. There is currently no supply gap for households making above 50% AMI.
- Without intervention, **the gap is projected to grow to 83,500 rental units** for households at or below 50% AMI by 2030. The gap doesn't stop there, however, and will extend to households at or below 80% AMI, which is \$71,200 (in 2021 dollars) for a family of four, in the years ahead.
- **Families with four or more people are particularly vulnerable:** there are 50 three-bedroom units affordable for every 100 households of 4+ people at or below 50% AMI, and by 2030, there will be just 15 three-bedroom units affordable for every 100 households.
- Among the largest drivers of the growing gap is the projected loss of almost 54,000 units of naturally occurring affordable housing (NOAH) due to market forces and an insufficient supply of deed-restricted housing in the pipeline.
- **Dallas ranks 10th out of the 12 largest cities for affordable housing units in "high opportunity" census tracts** and remains the most segregated big city in Texas – and among the most segregated big cities in the nation.

We believe it is a meaningful step in the right direction to have a clear fact base of the rental market conditions facing low-income families, an intentional focus on key drivers underpinning our growing supply gaps, and a methodology that can be replicated annually to chart progress over time. These are all necessary ingredients for collective accountability to achieve production goals such as those adopted earlier this year by the City Council as part of the new housing policy.

In the spirit of building a shared understanding of the problem, we'd like the Rental Housing Needs Assessment to reach as many eyes as possible throughout Dallas. The metrics and insights are sobering, but let's resist any urge to use these findings as a tool for pointing fingers or simply admiring the problem. In that same spirit, we stand ready to support the many stakeholders who are motivated by the findings to translate problems into projects and move toward collaborative action.

To the many reading this with a role to play in advancing affordable housing throughout Dallas, please consider reaching out to us. We are eager to hear your questions and ideas and look forward to working together.

Gratefully,

Ashley Flores  
Senior Director, Child Poverty Action Lab

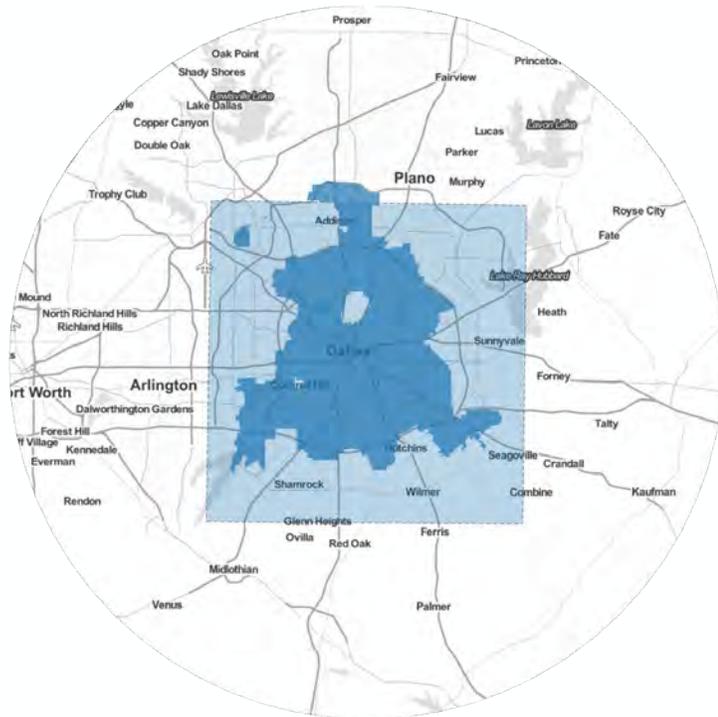
Alan Cohen  
Founder and CEO, Child Poverty Action Lab

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# Report Focus



A city's housing market is a result of a confluence of factors: regional economic opportunity, existing housing supply, migration patterns, historic inequities, macroeconomic trends, and household preferences, among others. Addressing housing goals can mean different things for different residents: building affordable housing, preventing displacement, creating homeownership opportunities, or repairing dilapidated housing stock.

In Dallas, addressing the needs of renters, who often face higher poverty rates and cost burdens, is crucial to foster a more equitable and inclusive community. Prioritizing affordable rental options can support lower-income households, essential workers, and homelessness prevention. **This report focuses on the rental housing needs for the City of Dallas' residents, with an emphasis on low-income households.**

Homeownership opportunities and rental affordability are often linked—in Dallas, trends suggest that moderate and high-income renters who are unable to afford homes are bidding up rents for lower-income residents. Homeownership can be an important wealth-building tool and long-term stabilizer for families. Subsequent CPAL projects will significantly focus on homeownership opportunities.



01

# Executive Summary

# Key Takeaways

- 1** In 2021, the City of Dallas had a **33,660-unit gap in affordable housing** for households earning at or below 50% of AMI.<sup>1</sup> Four main factors have driven the rental housing gap in Dallas:
  - **Rapid regional growth:** The DFW metro-area has grown by more than 20% over the past decade.
  - **Prevalence of low-wage jobs:** The top four most common jobs by occupation in the DFW all have median wages under \$40,500.
  - **Insufficient production of new affordable units:** Since 2010, Dallas has delivered only 1.9 new, deed-restricted affordable units per 1,000 residents, ranking 21<sup>st</sup> of 32 big cities in the affordable unit production.
  - **Accelerated rent increases:** Rent has increased more in the 34 months since the beginning of the pandemic than in the 72 months prior.
- 2** **The gap is growing;** by 2030, the City of Dallas is projected to have a gap of 83,500 rental units for households at or below 50% AMI.
  - The widening of the rental housing gap will be driven by a projected loss of almost 54,000 units of naturally-occurring affordable housing (NOAH) for residents at or below 50% AMI.
- 3** Without intervention, the current trend will exacerbate existing inequalities across Dallas, **hindering economic mobility for low-income children.**
  - Dallas ranks 10<sup>th</sup> out of the 12 largest cities for affordable housing units in “high opportunity” census tracts<sup>2</sup> and remains the most segregated big city in Texas – and among the most segregated big cities in the nation.
  - Lack of housing affordability forces families to make tradeoffs with basic daily needs (e.g. food, clothing, transportation). On average, families at or below 50% AMI are spending nearly half their income on housing each month.

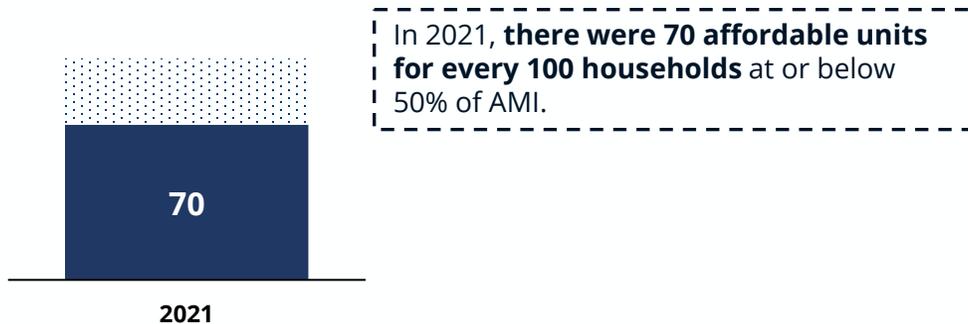
1. AMI stands for Area Median Income, a measure of the median income of a specific geographic area calculated by the Department of Housing and Urban Development (HUD). In the City of Dallas for 2021, 50% AMI is \$31,150 for a 1-person household; \$35,600 for a 2-person household; and \$40,050 for a 3-person household. More details on slide 55.

2. Access to opportunity refers to the availability and accessibility of resources, services, and amenities that can improve the quality of life and enhance the prospects for social and economic advancement for residents. It encompasses various aspects of a community, such as education, employment, healthcare, transportation, and safety, which can affect the well-being of individuals and families living in a particular area.

## EXECUTIVE SUMMARY

Currently, the City of Dallas faces a **33,660-unit housing supply gap**, where demand for housing exceeds supply, for low-income residents earning at or below 50% AMI.

### City of Dallas Units affordable per 100 Households at or below 50% AMI



**Note:** AMI stands for Area Median Income, a measure of the median income of a specific geographic area calculated by the Department of Housing and Urban Development (HUD). In the City of Dallas, 50% AMI is \$31,150 for a 1-person household; \$35,600 for a 2-person household; and \$40,050 for a 3-person household. More details on slide 55.

**Source(s):** PUMS, ACS 2021 5-Year Estimates, Variables: HINCP, GRNTP, TEN, ADJINC, HR&A Calculations, State of Texas (TEPP) Projections, HUD AMI Limits.

## City of Dallas Current Housing Supply Gap for 50% AMI

2021

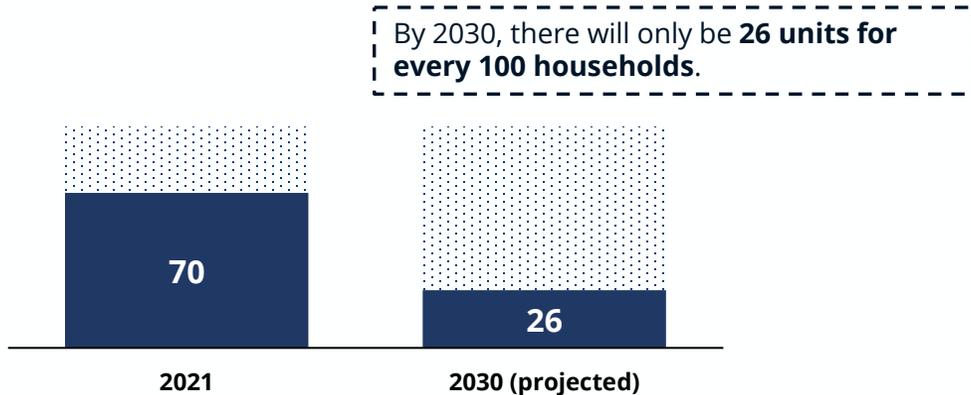


## EXECUTIVE SUMMARY

Currently, the City of Dallas faces a **33,660-unit housing supply gap**, where demand for housing exceeds supply, for low-income residents earning at or below 50% AMI.

This gap is projected to increase by 50,000 units to about **83,500 units by 2030**.

### City of Dallas Units affordable per 100 Households at or below 50% AMI



**Note:** AMI stands for Area Median Income, a measure of the median income of a specific geographic area calculated by the Department of Housing and Urban Development (HUD). In the City of Dallas, 50% AMI is \$31,150 for a 1-person household; \$35,600 for a 2-person household; and \$40,050 for a 3-person household. More details on slide 55.

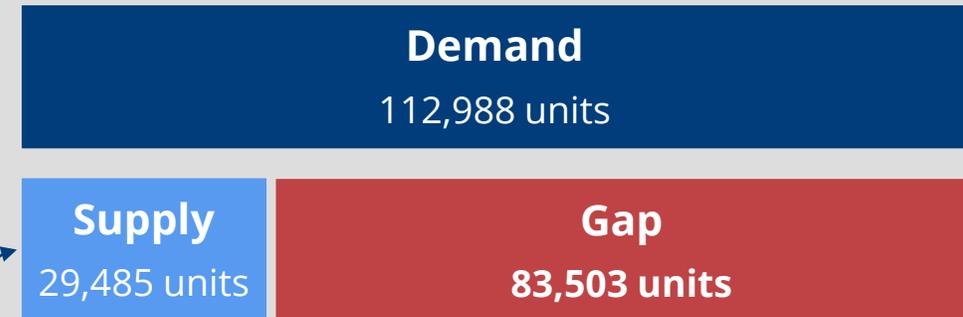
**Source(s):** PUMS, ACS 2021 5-Year Estimates, Variables: HINCP, GRNTP, TEN, ADJINC, HR&A Calculations, State of Texas (TEPP) Projections, HUD AMI Limits.

### City of Dallas Current and Future Housing Supply Gap for 50% AMI

#### 2021



#### 2030 (projected)

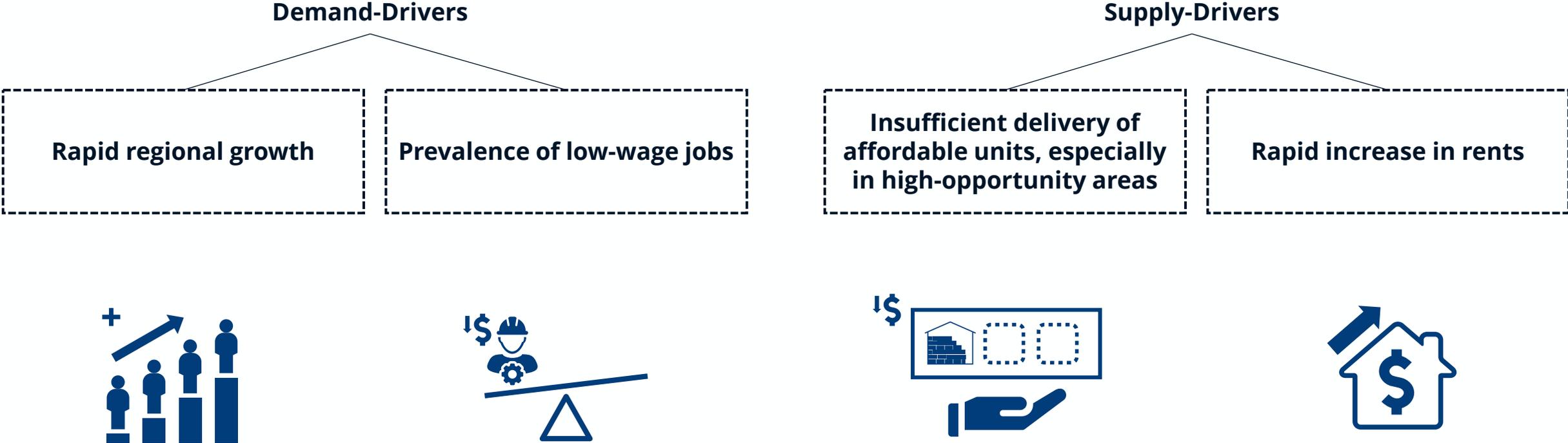


Slight decrease in demand with modest increases in wages for lower income households since 2020.

Rapid decrease in projected supply of units affordable to households earning below 50% as rents continue to outpace incomes...

...resulting in a gap in affordable units of 83,503 units.

There are **four main factors** driving the current housing gap in the City of Dallas.



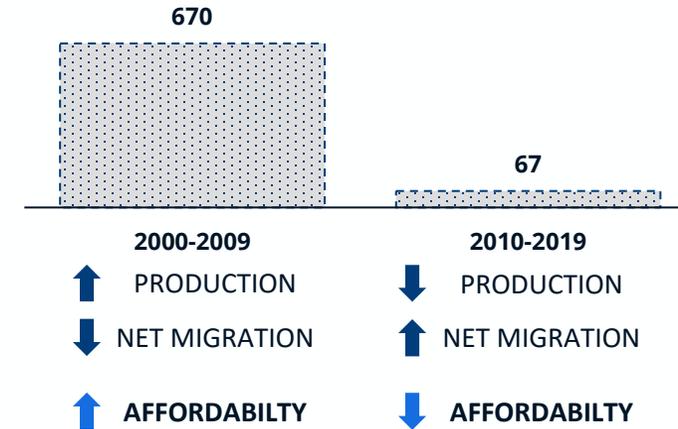
EXECUTIVE SUMMARY

**Rapid Regional Growth** | The Dallas-Fort Worth metro was the seventh fastest-growing large metro in the country, **growing over 20%** in the last decade.

**Dallas-Fort Worth Metro Comparative Population Growth 2011-2021, Metro Areas (CBSAs) with population 1,000,000 or greater**



**City of Dallas New Units per 100 net new residents 2000-2019**



**The city built almost as many units in the 2000s (61,900 units) and the 2010s (71,000 units) but added 10 times as many residents in the 2010s (more than 100,000 residents versus less than 10,000 in the 2000s).**

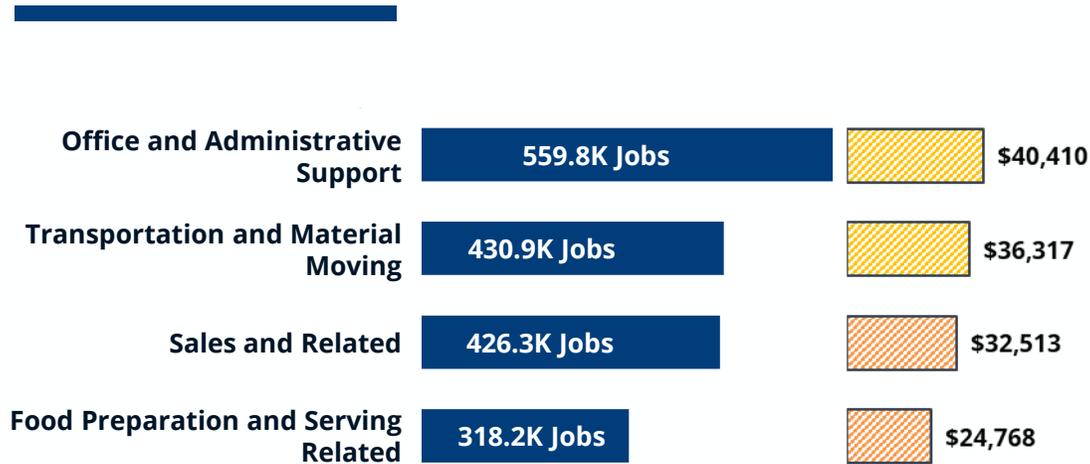
**Note:** New units based on building permits survey, Housing and Urban Development (HUD) BPS data.

**Source(s):** U.S. Decennial Census 1990-2021, Total Population; BLS 2022, Employment by Industry, Median Wage by Industry. ACS 2021 5-Year Estimates, B25001: Housing Units

EXECUTIVE SUMMARY

**Prevalence of Low-Wage Jobs** | Despite recent increases in wages and a historically low unemployment rate, the metro area has a high prevalence of low-wage jobs—the top four most common jobs types in the metro all have a **median wage less than \$40,500**.

**Metro Area Top 4 Employment by Occupation and Median Wage 2022**



**Units Available by Household Type 2021**

Household Type	Total Household Income	Supportable Rent	Unit Type	Units Affordable per 100 households competing
1-working adult + 1 child	\$40,500	~\$1,000	2-BR+	<b>66</b>
1-person household	\$40,500	~\$1,000	Studio/1-BR+	<b>83</b>
2-working adults + 2 children	\$81,000	~\$2,000	3-BR+	<b>112</b>
2-working adults	\$81,000	~\$2,000	1-BR+	<b>185</b>

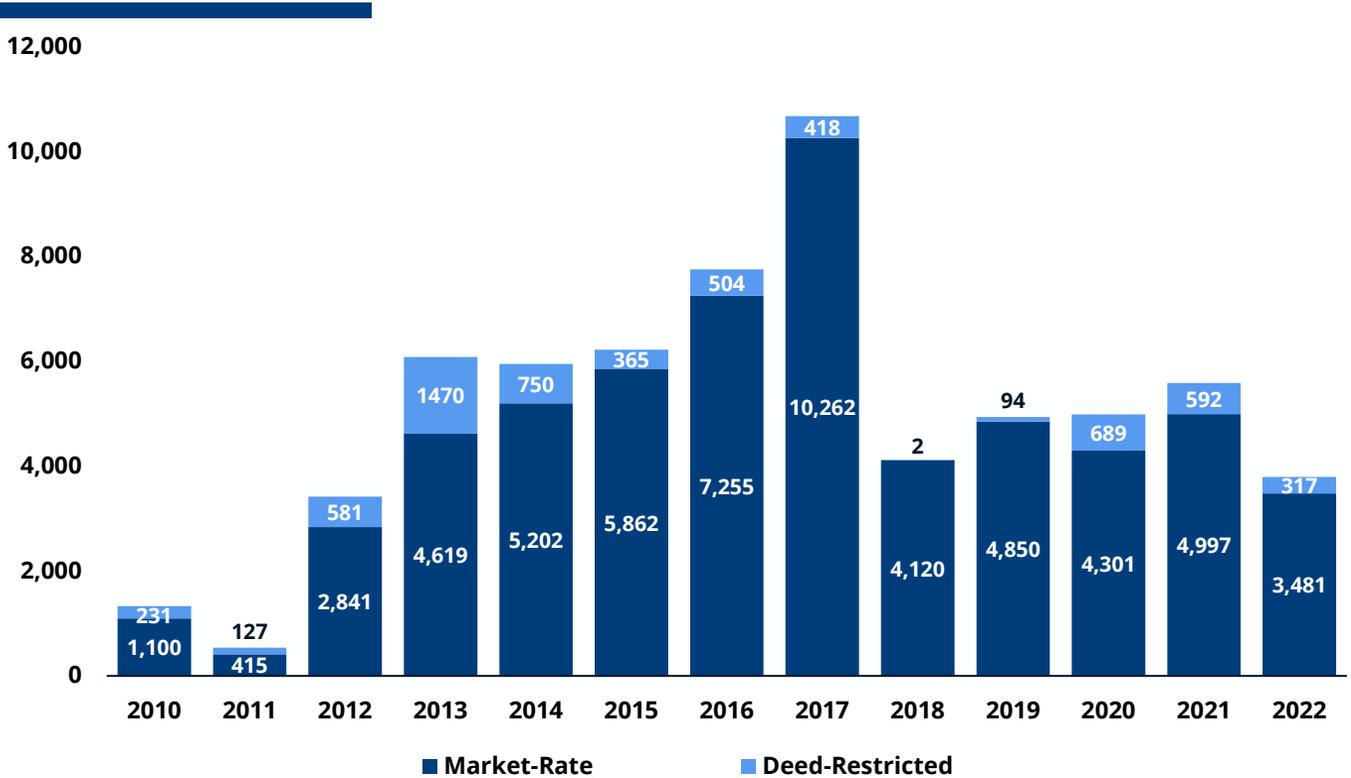
Single parents making \$40,500 who are looking for a two-bedroom unit available at or below \$1,000 per month have only **66 units available for every 100 households**.

The fewer the units affordable to the household, the less discretion they have over their housing choice. In the table above, 1-person households and the 2-working adults with no children are both competing for 1-bedroom units, but the dual income household has much more housing choice compared to the single-person household.

*Source(s): U.S. Decennial Census 1990-2021, Total Population; BLS 2022, Employment by Industry, Median Wage by Industry. PUMS, ACS 2021 5-Year Estimates, Variables: HINCP, GRNTP, BDSP, TEN, ADJINC, HUPAC, HR&A Calculations.*

## Insufficient Delivery of New Affordable Units | Since 2010, only **10%** of new units in the city have been deed-restricted affordable units.

**Multifamily Units built since 2010**  
Affordable versus Market Rate



Of all cities across the country with more than 500,000 people, Dallas ranks **21<sup>st</sup> out of 32** in affordable unit production since 2010 (1.9 new affordable units per 1,000 residents).

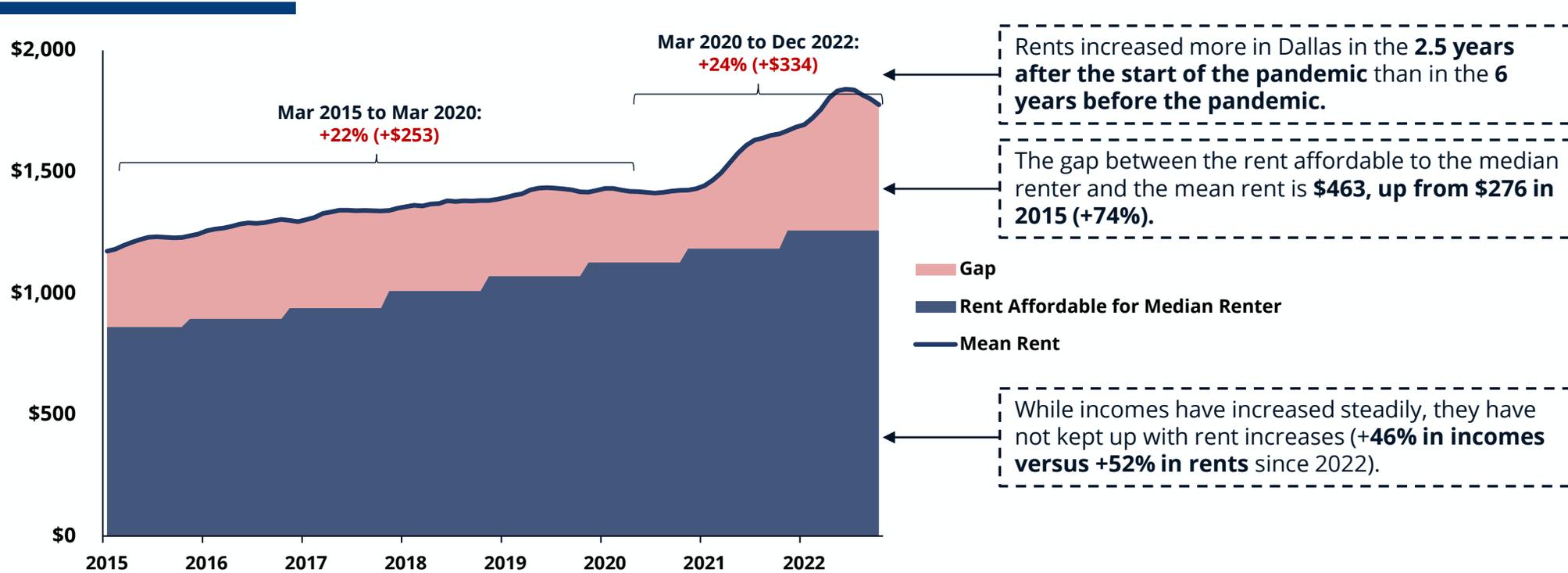
Affordable or deed-restricted affordable housing is a type of rental housing where the cost of renting a property is made more affordable through legal restrictions placed on the deed of the property. These restrictions are designed to ensure that the property remains affordable to low- or moderate-income households, even as market prices for other properties in the area rise. These restrictions are often in place in exchange for government subsidy, such as low-income housing tax credits (LIHTC) or tax abatement.

*Note: Deed-restricted units include units subsidized by federal loan, insurance, and voucher programs, and by state Low Income Housing Tax Credit and Section 236 programs. Subsidies issued by Texas Public Facility Corporation (PFC) communities are not captured in NHPD data unless they also have federal subsidies. PFC communities are inventoried by CoStar as 'market/affordable', which are included in 'market-rate', if the only subsidies are issued by the PFC. The full list of properties are provided in the appendix.*

Source(s): CoStar, NHPD.

**Rapid Increase in Rents** | Mirroring national trends, rents have steadily increased over the last decade and rose **rapidly since the pandemic**.

**City of Dallas Mean<sup>1</sup> Rents versus Rents affordable to Median Renter 2022**



**Source(s):** ACS 2021 5-Year Estimates B25119: Median Household Income in the Past 12 Months by Tenure, Zillow, ZORI.

**1.** To provide the most accurate and recent estimates, average rent data is sourced from Zillow through the Zillow Observed Rent Index (ZORI) which is a weighted average rent index of observed rent changes on properties tracked over time. Median renter income data is sourced from the American Community Survey.

## EXECUTIVE SUMMARY

The lack of homes that are affordable to lower-income families disproportionately affects **Black renters, households with children, and seniors.**

For larger households, the housing supply gap is far more acute. In 2021, there were **50 3-bedroom units** affordable for households at or below 50% AMI for every **100 households** with 4 or more people.

Households with children, especially **single-parents with children**, face a disproportionate housing cost burden. Almost **three in four single-parents** with children living in the city are cost-burdened, while more than half of all senior renters are cost burdened.

*Source(s): PUMS, State of Texas (TEPP) Projections, ACS, 2021 5-year, HUD AMI Limits; PUMS 2021, ACS 2021 5-year estimates, Variables: HINCP, ADJINC, NP, GRNTP, RAC1P, TEN, CHLD, HR&A Calculations.*

### City of Dallas Housing Supply Gap for Large Households below 50% AMI 2021 (4+ Person Households, 3+ Bedrooms)



*Note: Large households include those with 4 or more household members.*

### Cost Burdened Renters 2021

Cost Burden %	City of Dallas
All Renters	48%
Senior Renters	55%
Renter Households with Children	54%
Renter Single Parents with Children	74%
Black Renters	55%
Non-Hispanic White Renters	38%
Hispanic/Latino Renters	47%
Renters 35 and below	45%

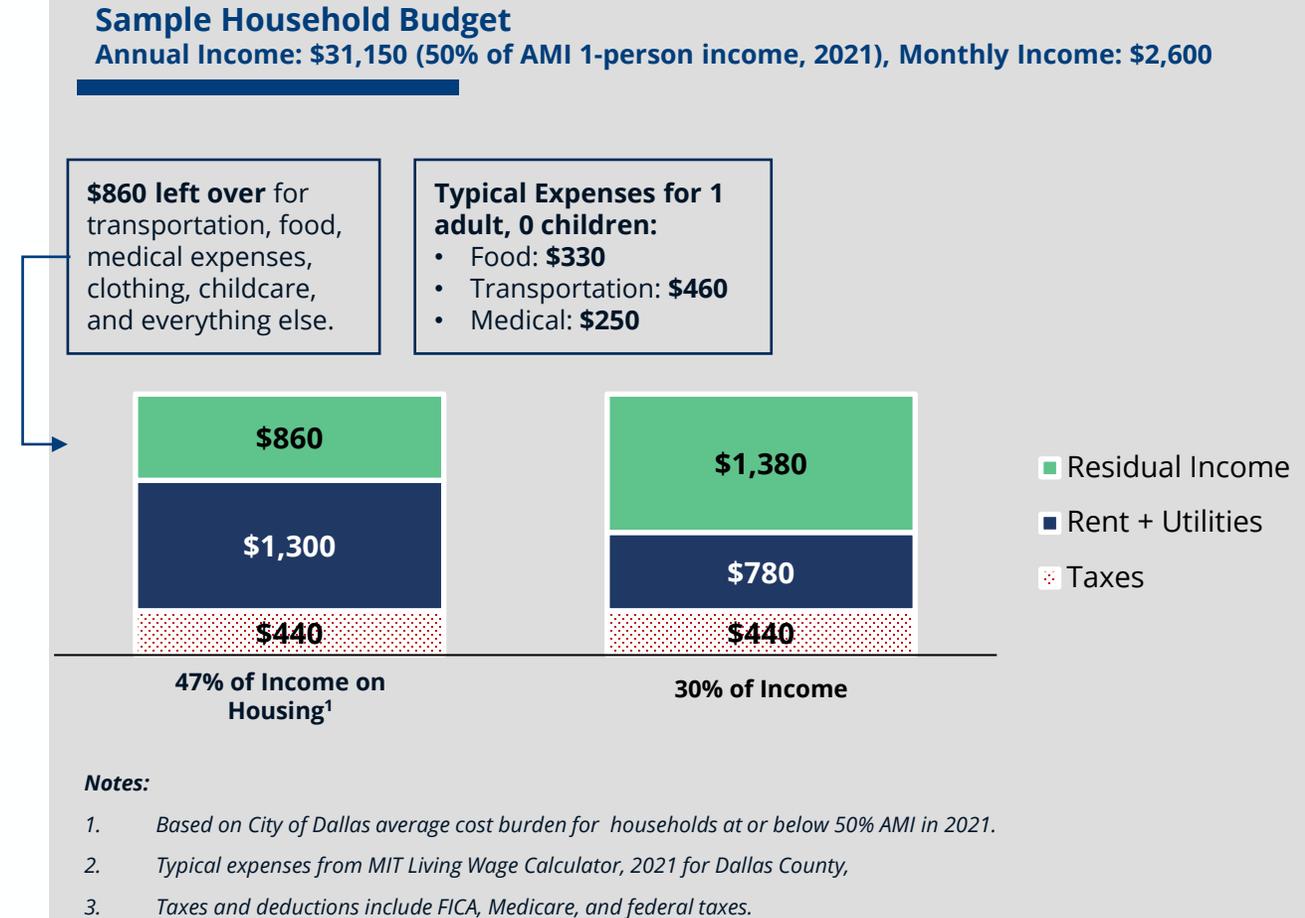
- 60% or more
- 55-59%
- 50-54%
- 45-49%
- 40-44%
- Less than or at 39%

## EXECUTIVE SUMMARY

For low-income renters, a high housing cost burden means **the inability to meet basic needs**—especially as prices continue to rise.

A household's "residual income" is their budget after accounting for rent. Households that pay more than what is affordable in rent often do not have enough residual income to pay for food, childcare, and medical bills.

On average, households at or below 50% of AMI spend **47% of their income on housing costs**. For a renter making \$31,150, that means not being able to meet daily needs without government assistance.



## EXECUTIVE SUMMARY

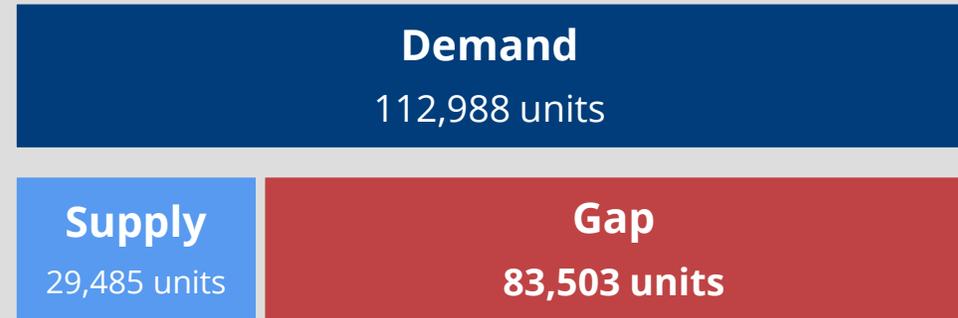
By 2030, the housing supply gap is projected to **increase to 83,503 units** for households earning at or below 50% of AMI.

In 2021, there were **70 units affordable for every 100 households** at or below 50% of AMI. In 2030, there will be a projected **26 units affordable for every 100 households**.

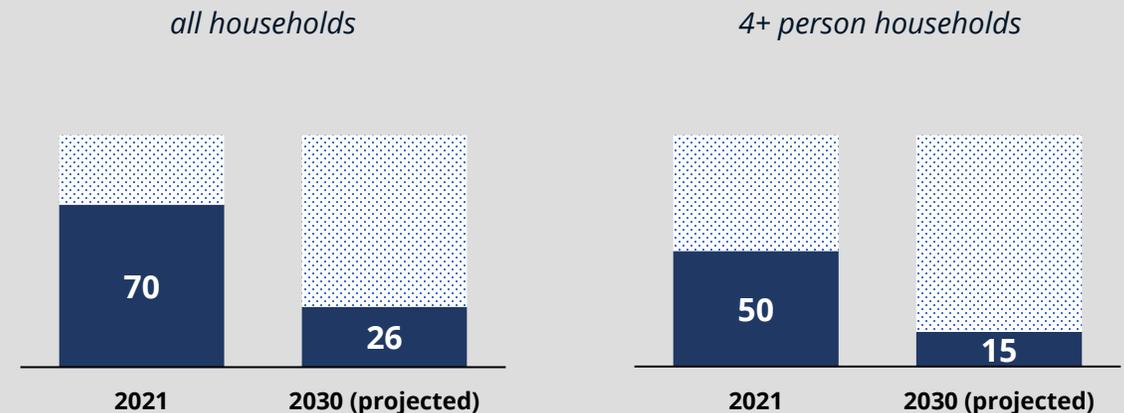
In 2021, for **households with four or more people**, there were **50 units affordable for every 100 households** at or below 50% of AMI. In 2030, there will be a projected **15 units affordable for every 100 households**.

**Source(s):** PUMS, State of Texas (TEPP) Projections, ACS, 2021 5-year, HUD AMI Limits; PUMS 2021, ACS 2021 5-year estimates, Variables: HINCP, ADJINC, NP, GRNTP, TEN, HR&A Calculations.

### City of Dallas Projected Housing Supply Gap for 50% AMI 2030 (projected)



### City of Dallas Units affordable per 100 Households at 50% AMI

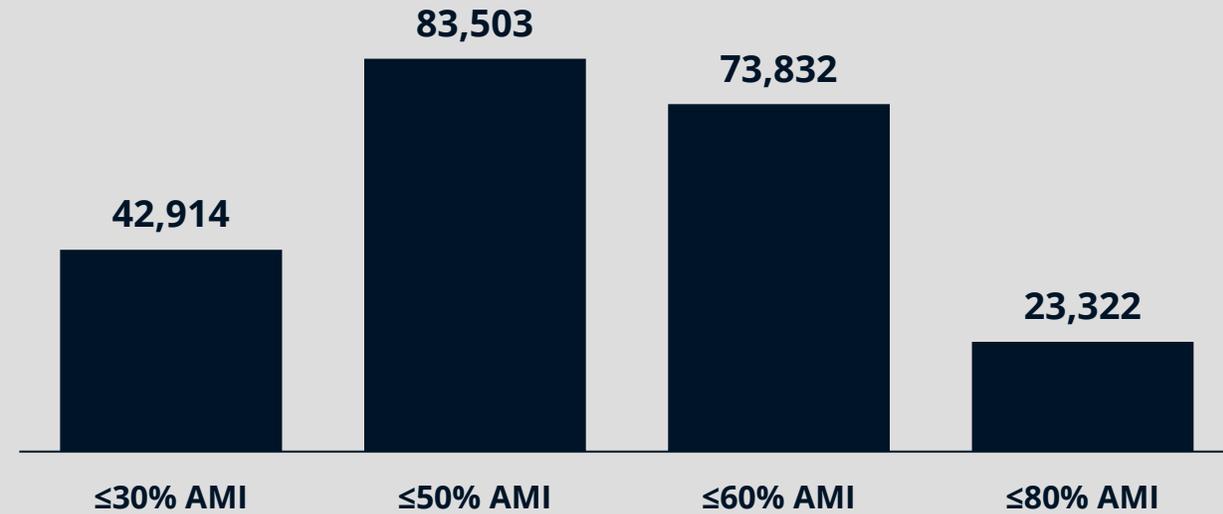


## EXECUTIVE SUMMARY

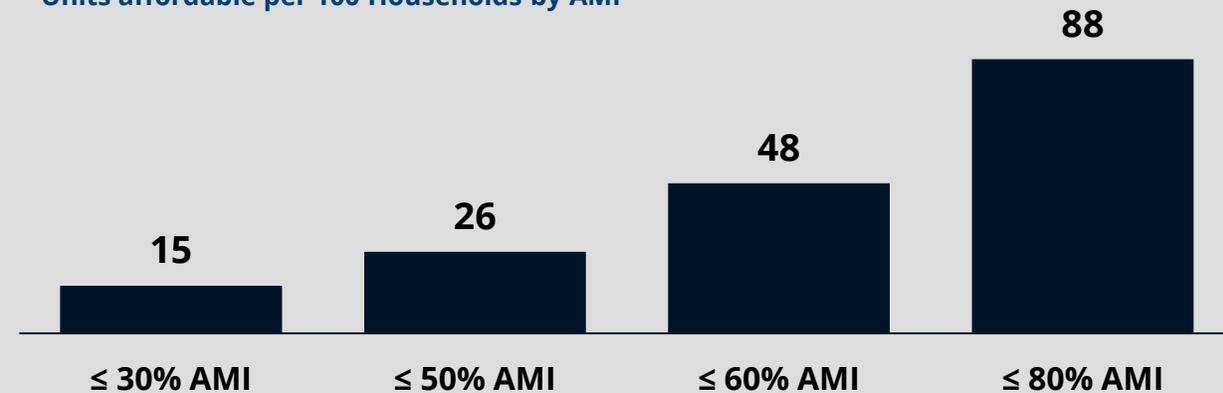
The rental housing supply gap will begin to affect higher income households, with a **gap of 23,300 units for households earning up to 80% of AMI.**

*Source(s): PUMS, State of Texas (TEPP) Projections, ACS, 2021 5-year, HUD AMI Limits; PUMS 2021, ACS 2021 5-year estimates, Variables: HINCP, ADJINC, NP, GRNTP, TEN, HR&A Calculations.*

**City of Dallas Projected Housing Supply Gap**  
2030 (projected)



**City of Dallas Projected Housing Gap**  
2030 (projected)  
Units affordable per 100 Households by AMI



## EXECUTIVE SUMMARY

The key driver that is widening the gap is the **loss of market-rate affordable units (NOAH)** that are projected to rapidly increase in rent, given current market trends.

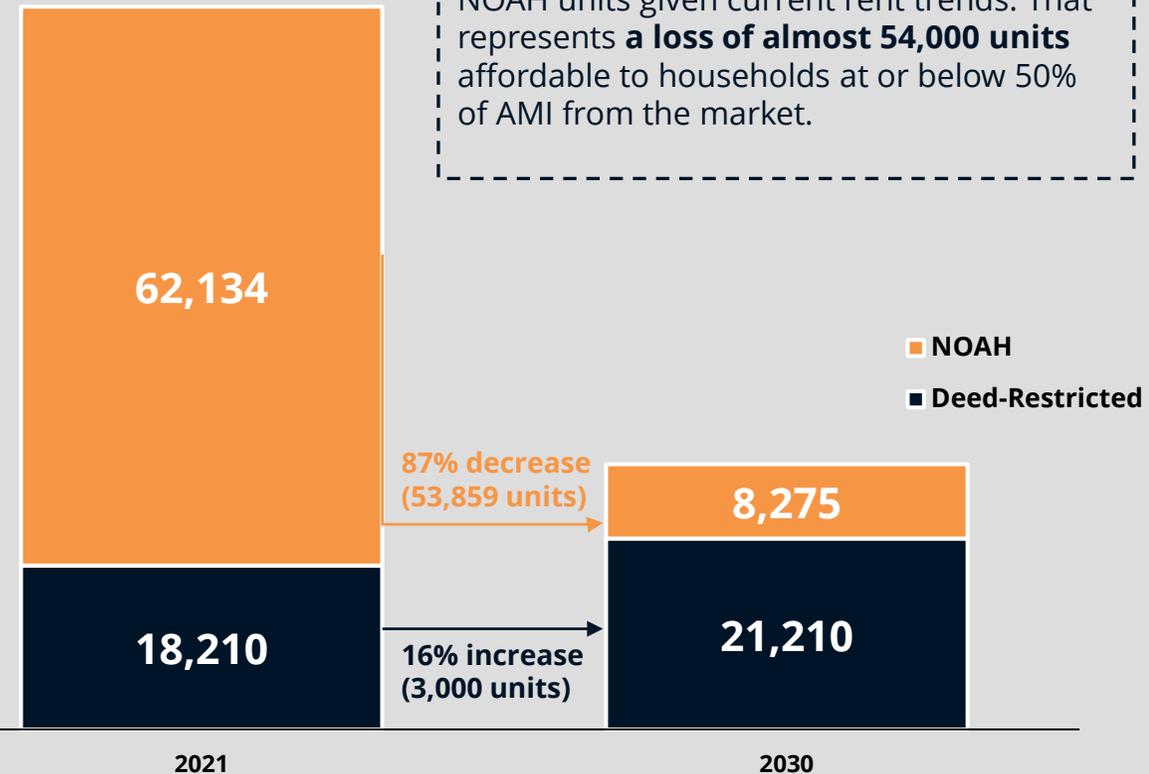
Unrestricted affordable units or NOAH units (Naturally Occurring Affordable Housing) are terms used to describe existing affordable rental housing that is not subsidized by government programs such as the Low-Income Housing Tax Credit (LIHTC) or public housing. NOAH properties are typically owned by private landlords or small-scale property owners who rent out units at below-market rates.

NOAH properties can provide a critical source of affordable housing for low-income households, especially in high-cost areas where subsidized housing is limited.

Because NOAH properties are not subsidized by government programs, they are **vulnerable to market pressures such as rising property values and rents**, which has led to the loss of affordable housing units.

**Source(s):** ACS 2021 5-year estimates, B25032. Tenure by Units in Structure, B25068: Bedrooms by Gross Rent, National Housing Preservation Database, 2022; NHPD. Potential New based on 20<sup>th</sup>-80<sup>th</sup> percentile average of development from 2012-2022. Units potentially expiring reflects last known covenant on property.

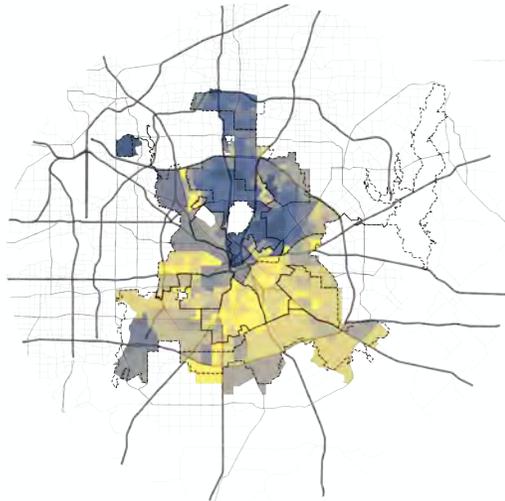
### Projected Affordable Units (at or below 50% AMI) in the City of Dallas 2021, 2030 (projected)



## EXECUTIVE SUMMARY

**Where you live shapes your future.** Locating housing in high-opportunity areas, with access to schools, transportation, and jobs, empowers families with tools to achieve future success, improve their health outcomes, and realize upward economic mobility.

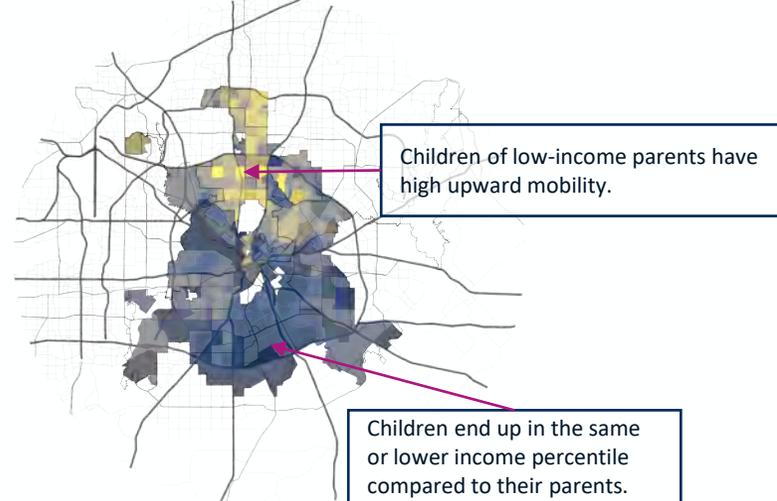
**General Health by Census Tract**  
2021



Estimated Share with Poor  
General Health



**Economic Mobility by Census Tract**  
2021



Children of low-income parents have  
high upward mobility.

Children end up in the same  
or lower income percentile  
compared to their parents.

Average Income Percentile  
for Children of Parents in  
the 25<sup>th</sup> percentile



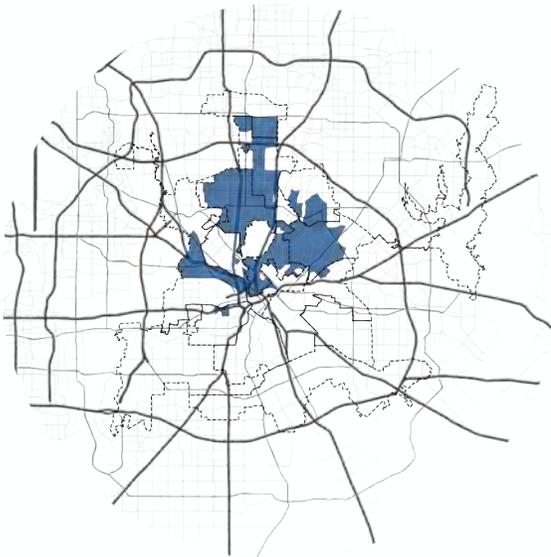
Access to opportunity refers to the availability and accessibility of resources, services, and amenities that can improve the quality of life and enhance the prospects for social and economic advancement for residents. It encompasses various aspects of a community, such as education, employment, healthcare, transportation, and safety, which can affect the well-being of individuals and families living in a particular area.

**General health outcomes** and **economic mobility** are two measures of opportunity—both of which are highly correlated with neighborhood and geography in the United States.

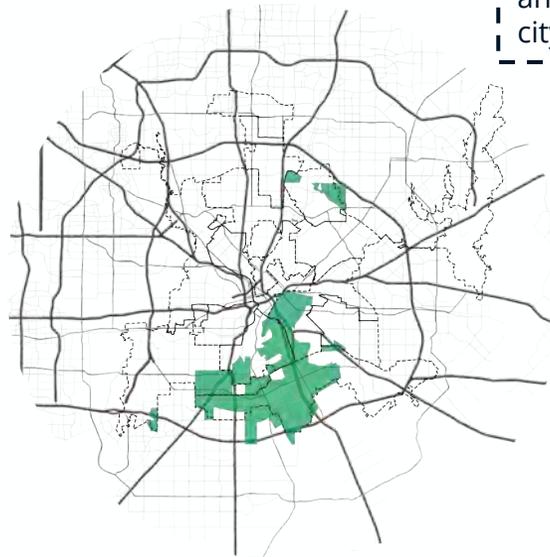
## EXECUTIVE SUMMARY

Dallas remains **one of the most segregated cities** in the nation and is the most segregated big city in Texas.

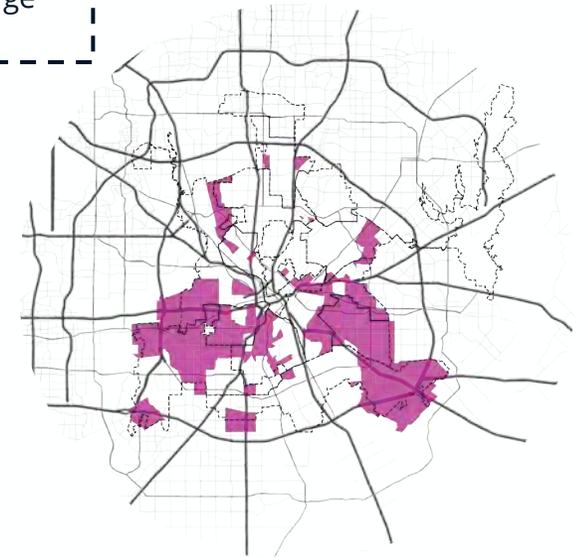
### City of Dallas Census Tract by Majority Race/Ethnicity 2021



Non-Hispanic White



Black



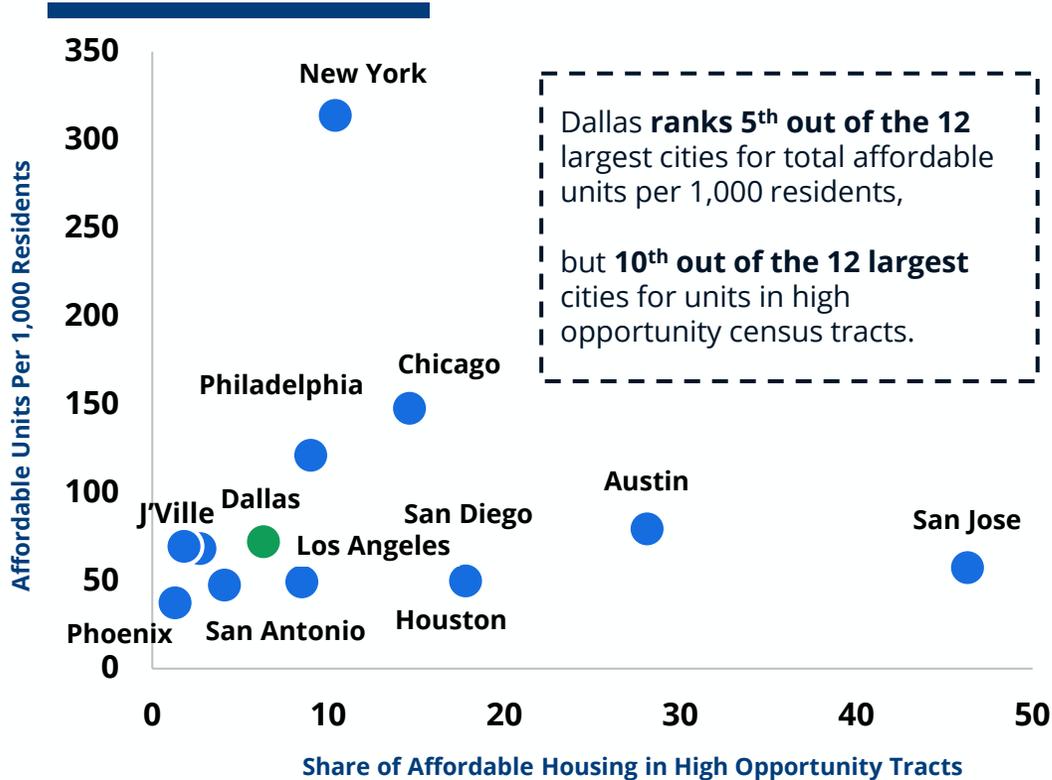
Hispanic / Latino

Of all cities nationally with a population greater than 500,000, Dallas ranks as the **tenth most segregated city** (out of 38 cities) and the most segregated large city in Texas.

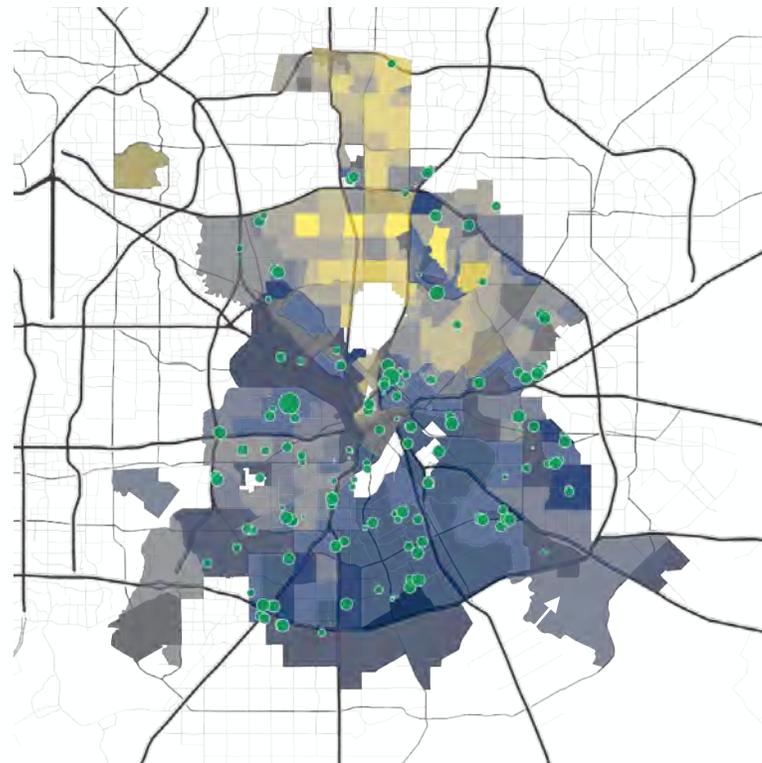
EXECUTIVE SUMMARY

**Current development trends are exacerbating existing inequities.** Deed-restricted affordable housing is concentrated in southern Dallas, while new market-rate development is concentrated in the northern parts of the city.

**Affordable Units by Access to Opportunity**  
Top 10 Cities (2021)



**Deed Restricted Affordable Units by Location & Economic Mobility by Census Tract**



Of all counties nationally with a population greater than 1,000,000, Dallas County ranks 42 out of 49 for economic mobility and the most segregated large county in Texas.

Source(s): National Housing Preservation Database, 2022; NHPD. U.S. Census Opportunity Atlas, PUMS ACS 2021 5-Year Estimates: Variables: HINCP, ADJINC, NP, GRNTP, TEN, HUPAOC, HR&A Calculations.



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# Demographic Overview

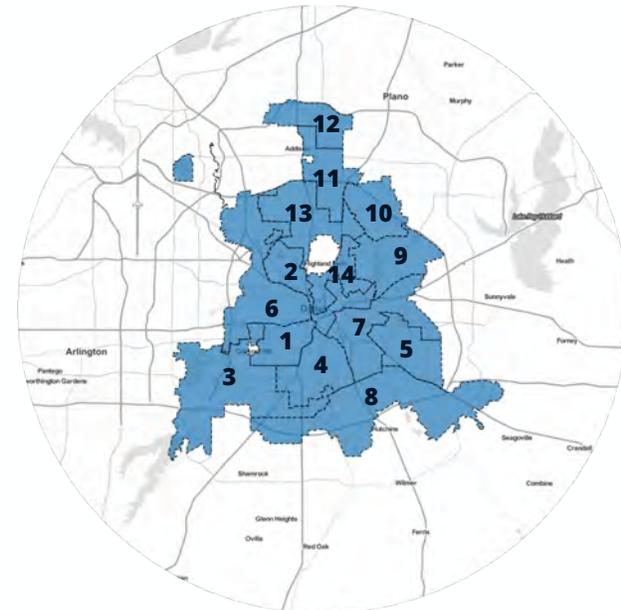
# Key Takeaways

- 1** The City of Dallas has grown steadily since 1990, adding more than **300,000 residents**—but lags explosive growth across the metro and state.
- 2** Segregation remains a key issue across the city. Of all cities nationally with a population greater than 500,000, **Dallas ranks as the tenth most segregated city (out of 38 cities) and the most segregated large city in Texas**, based on a dissimilarity index (p34). Most demographic indicators (poverty rate, median income, cost burden) show a stark divide between the wealthier and whiter northern Dallas and the predominantly BIPOC southern Dallas.
- 3** Despite growing incomes across the region, there is a **\$19,000 gap between the median income in the City of Dallas (\$58,200) and the metro area (\$76,900)**.
- 4** Higher income households are much more likely to be renters than a decade ago. In 2011, **one in five households (21%)** earning more than \$100,000 were renters, compared to almost **two in five (38%)** in 2021, putting further pressure on rents for low-income renters.

## GEOGRAPHIES OF INTEREST

This report focuses on the rental housing needs for the City of Dallas, with comparisons to Dallas County, and the surrounding Dallas-Fort Worth-Arlington metropolitan statistical area.

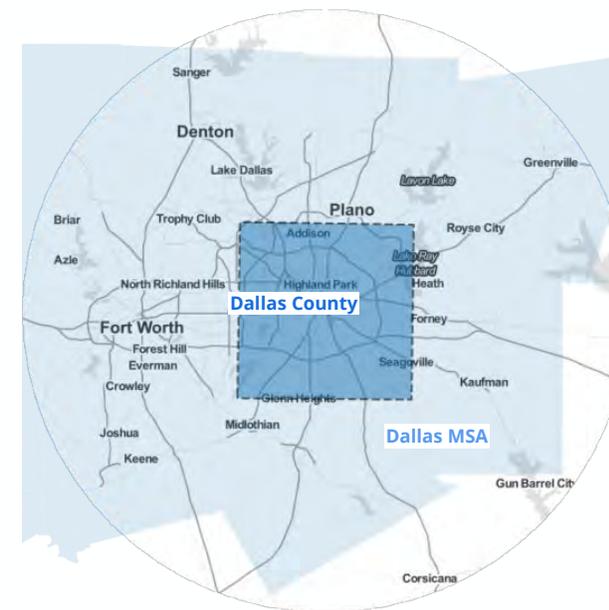
### City of Dallas Council Districts



### City of Dallas



### Dallas County



### Dallas-Fort Worth-Arlington MSA



**Note(s):** All analysis for Dallas Council Districts reflects current boundaries.  
The Dallas MSA and DFW refer to the Dallas-Fort Worth-Arlington Metropolitan Statistical Area.

**Source(s):** TIGER Shapefiles, US Census.

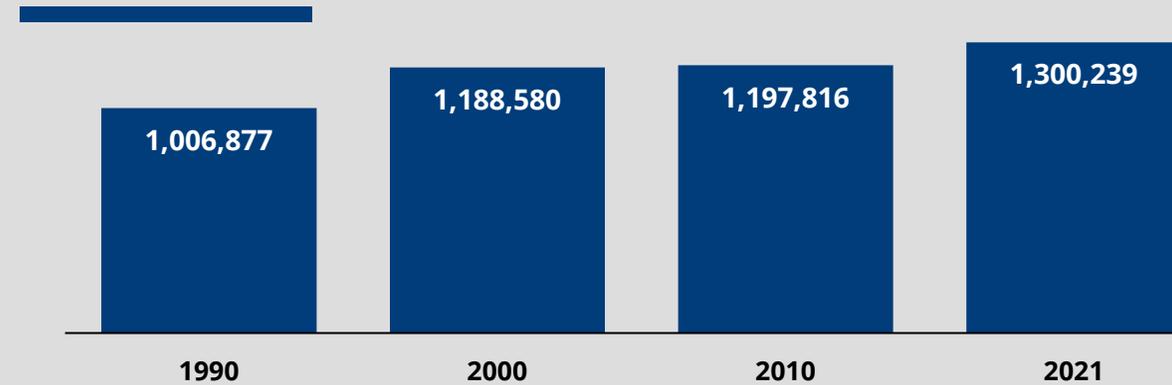
## DEMOGRAPHIC OVERVIEW | POPULATION

The City of Dallas' population has grown steadily since 1990 but at a slower rate than Dallas County and the Dallas MSA—since 2010, the city has added 100,000 new residents.

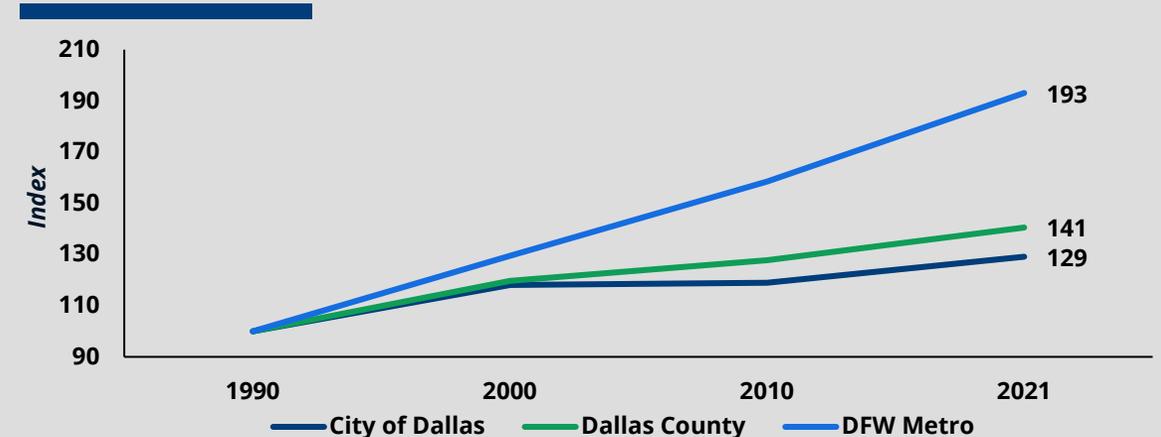
The City of Dallas has grown steadily over the last three decades—gaining approximately 300,000 new residents at a 29% overall growth rate. However, in the context of Texas' rapid growth (+93% since 1990), Dallas lags behind its neighbors.

The growth of the Dallas MSA over time has been characterized by a shift in population away from the City of Dallas and towards the surrounding suburbs and outlying areas, despite growth across the metro area. In 1950, over 90% of the population of the Dallas MSA lived within the city limits of Dallas. By 2019, this percentage had dropped to around 26%. This has been driven in large part by residential construction outside the city and a lack of vacant land available for new construction.

**City of Dallas Population**  
(1990-2021)



**Comparative Population Growth**  
(1990-2021), Index (Values Scaled to 100 for 1990)



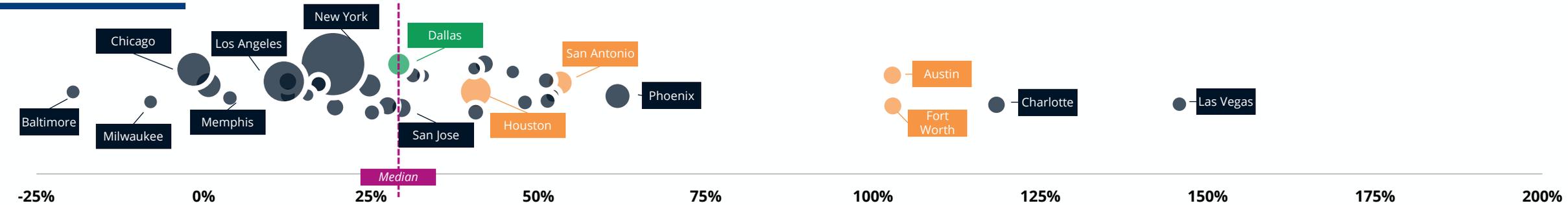
**Note:** Dallas County and DFW Metro figures are inclusive of their smaller geographies.

**Source(s):** U.S. Decennial Census 1990-2021, Total Population.

## DEMOGRAPHIC OVERVIEW | POPULATION

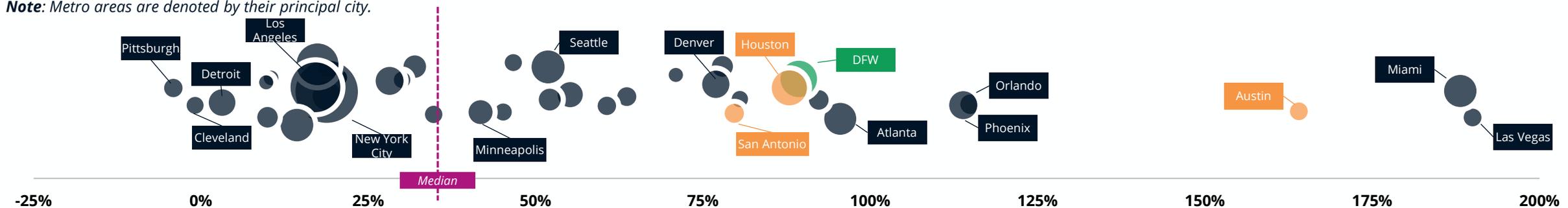
The Dallas-Fort Worth metro was the 8<sup>th</sup> fastest growing large metro in the country between 1990 and 2021 (out of 40), while the City of Dallas grew as fast as the median large city in the nation.

### City of Dallas Comparative Population Growth (1990-2021) Cities with population 500,000 or greater



### Dallas-Fort Worth Metro Comparative Population Growth (1990-2021) Metro Areas (CBSAs) with population 1,500,000 or greater

*Note: Metro areas are denoted by their principal city.*



## DEMOGRAPHIC OVERVIEW | POPULATION

Population growth has varied widely within the city, from 40%+ growth in central and eastern parts of the city, to stagnation and population declines west of the Dallas North Tollway.

Population growth impacts the number of residents served by Council Member Districts; while household growth (how the new population organizes into households) impacts the demand for housing units.

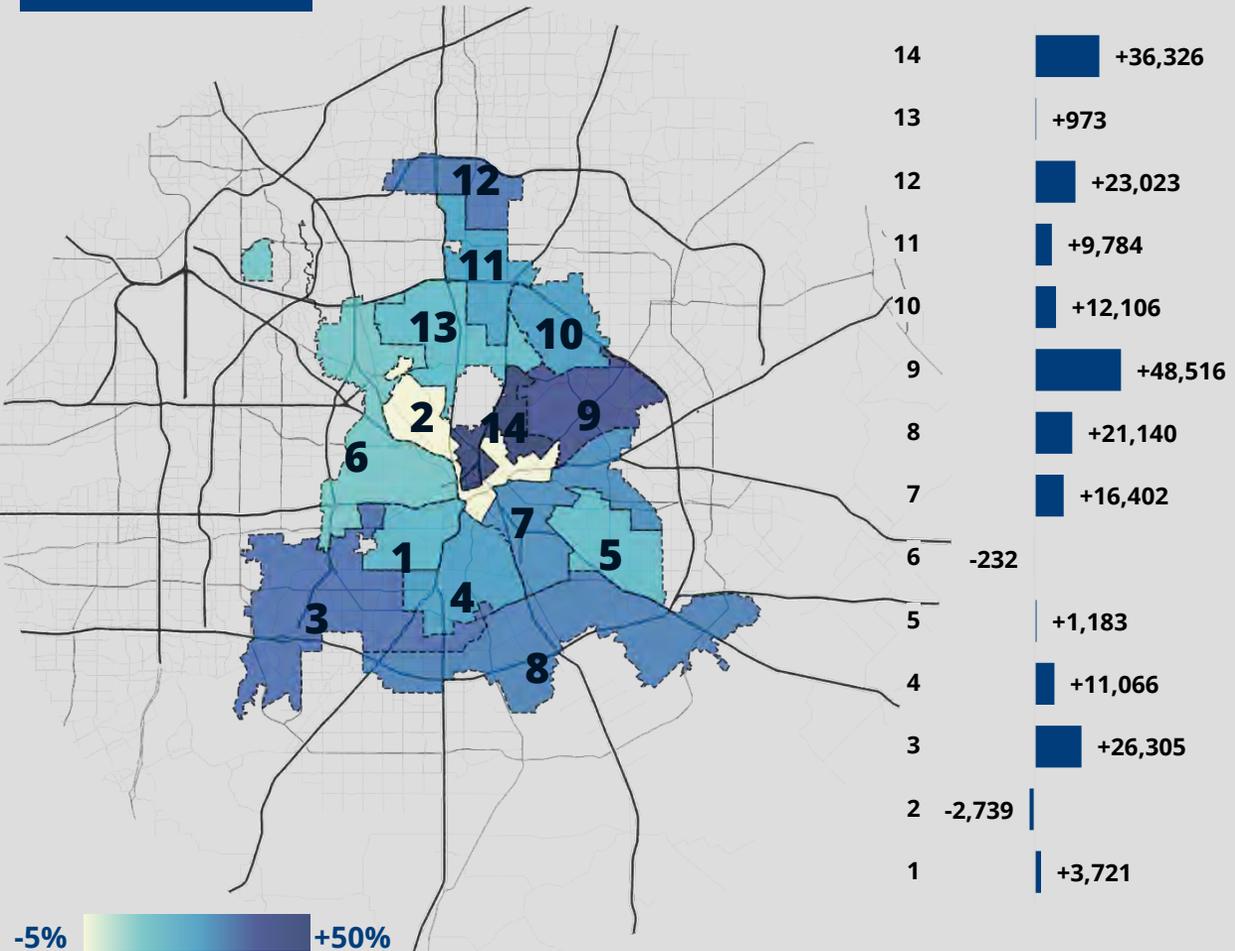
Council District 9 and 14 added the most residents across the city, with net increases of 48,000 (+49%) and 36,000 (+42%) respectively. The southern portions of the city also increased in population, with Council District 3 adding more than 25,000 new residents (+28%) and Council District 8 adding 21,000 residents (+23%).

Council Districts 2 and 6 lost population (-2,700 and -200 respectively) while Districts 13 and 1 added less than 5% in population over the decade.

**Note:** All calculations are based on current council district boundaries.

**Source(s):** ACS 2011-2021 5-year estimates, B01003: Total Population.

### Population Change (2011-2021)



## DEMOGRAPHIC OVERVIEW | HOUSEHOLD SIZE

Households in the City of Dallas are increasingly smaller than those in Dallas County and the Metro area—one and two-person households represent 88% of net new households in the city.

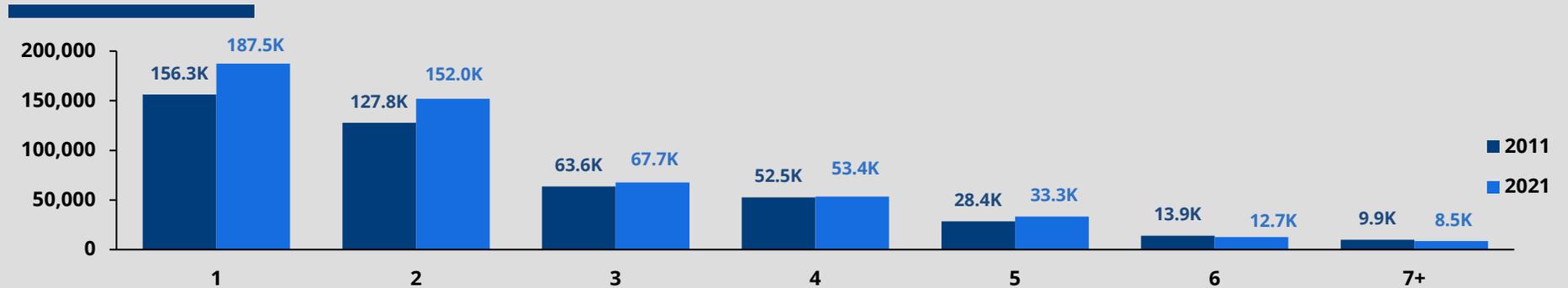
While the City of Dallas historically had a smaller average household compared to the Dallas-Fort Worth Metro, this gap has grown in the last decade, with the Metro area averaging 0.32 people more per household compared to the city.

Declining household sizes are a national trend that the Metro area has bucked with a slight increase in average household size—from 2.76 to 2.81. This may suggest that families in the city are unable to find attractive and affordable options within the city (based on schools or neighborhood amenities) and are instead moving to suburban counties.

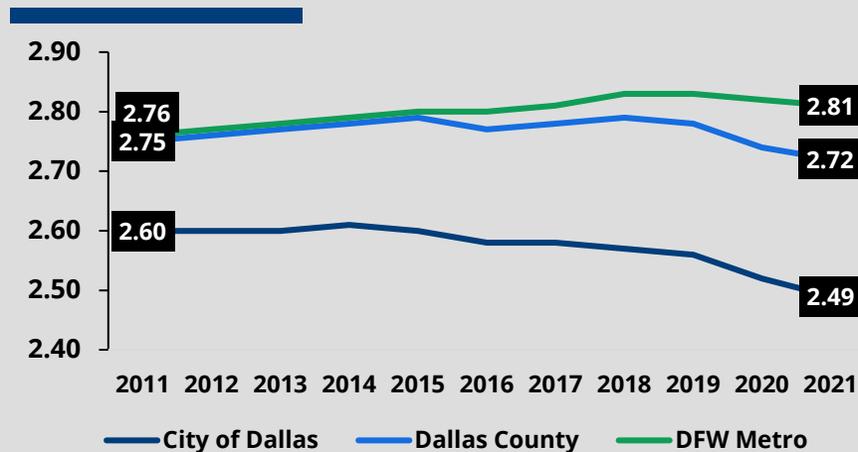
IRS data that tracks out-migrants from Dallas County in 2020 shows that more than 10,000 households moved from Dallas County to Tarrant, Denton, and Collin County each. **The average household size of out-migrants was 15% higher than those who moved in.**

**Source(s):** ACS 2011-2021 5-year estimates, B25009: Tenure by Household Size, B25010: Average Household Size of Occupied Units by Tenure, B07001: Geographic Mobility in the Past Year.

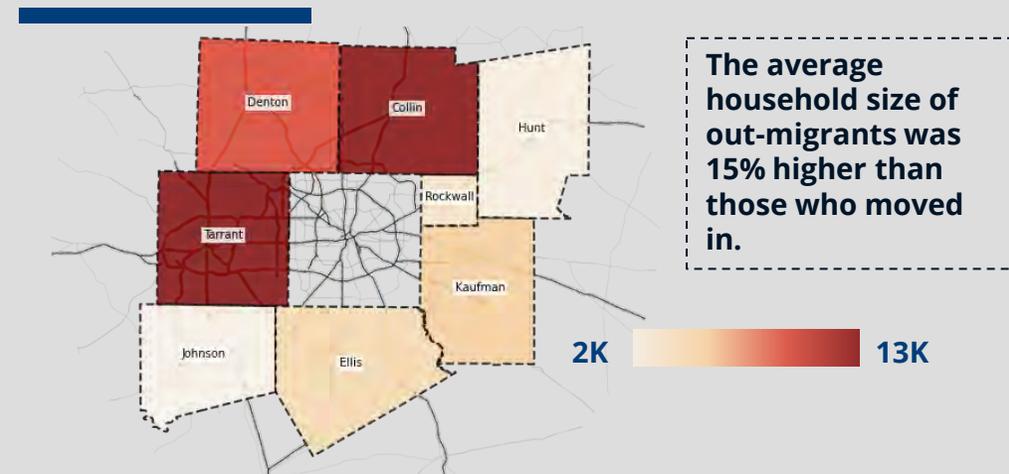
### City of Dallas Household Size (2011-2021)



### Average Household Size (2011-2021)



### Net Out-Migrants from Dallas County to other Metro Counties (2011-2021)



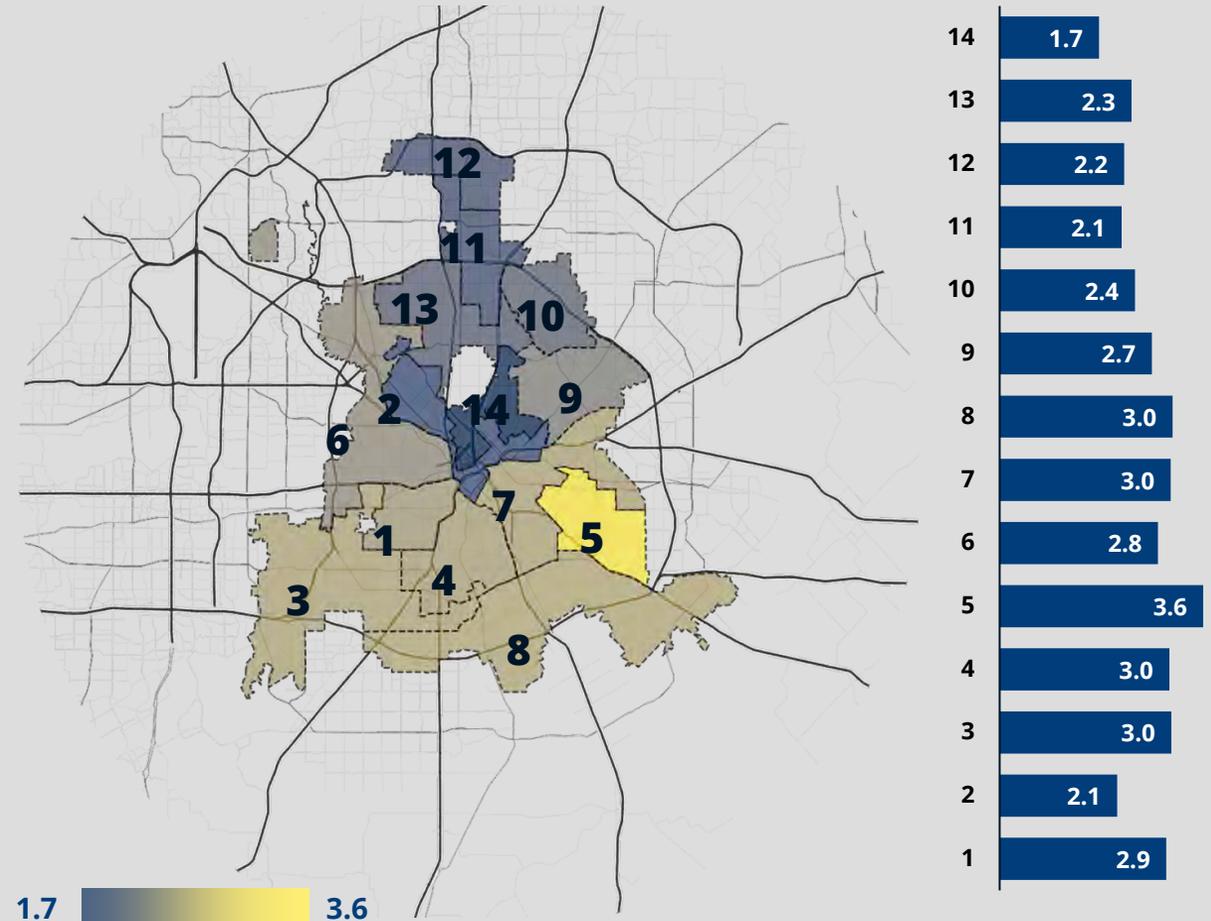
## DEMOGRAPHIC OVERVIEW | HOUSEHOLD SIZE

There is a wide range of household sizes across the city—from less than 2 people per household in Central Dallas, to an average household size greater than 3 in southern Dallas council districts.

Following national and statewide trends in urban cores, the average household in most council districts shrank between 2011 and 2021. The largest declines in household size were in districts 2, 6, and 1—all of them declining on average by 0.5 persons.

In southern Dallas, districts 7 and 8 increased in average household size, with an average of 3 people per household in 2021.

### Average Household Size (2021)



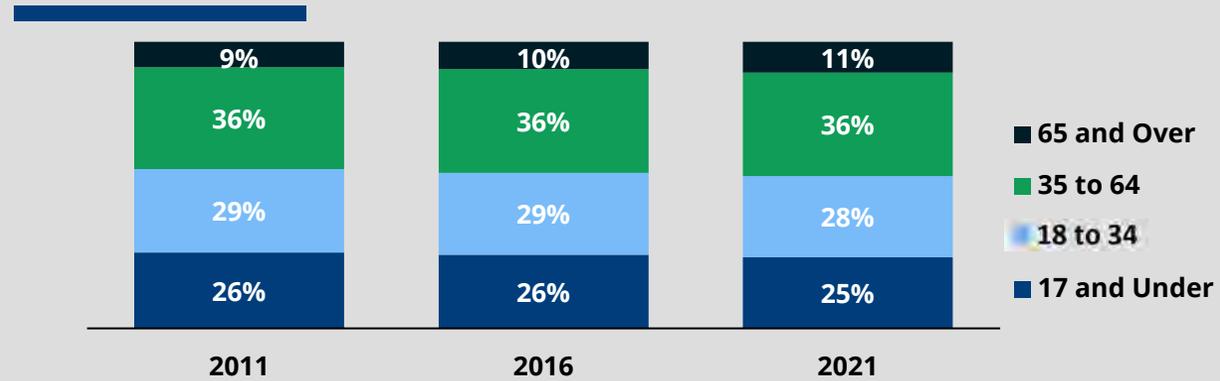
## DEMOGRAPHIC OVERVIEW | AGE DISTRIBUTION

The age distribution of residents of the City of Dallas has remained relatively constant since 2011 and is comparable to the county and metro area.

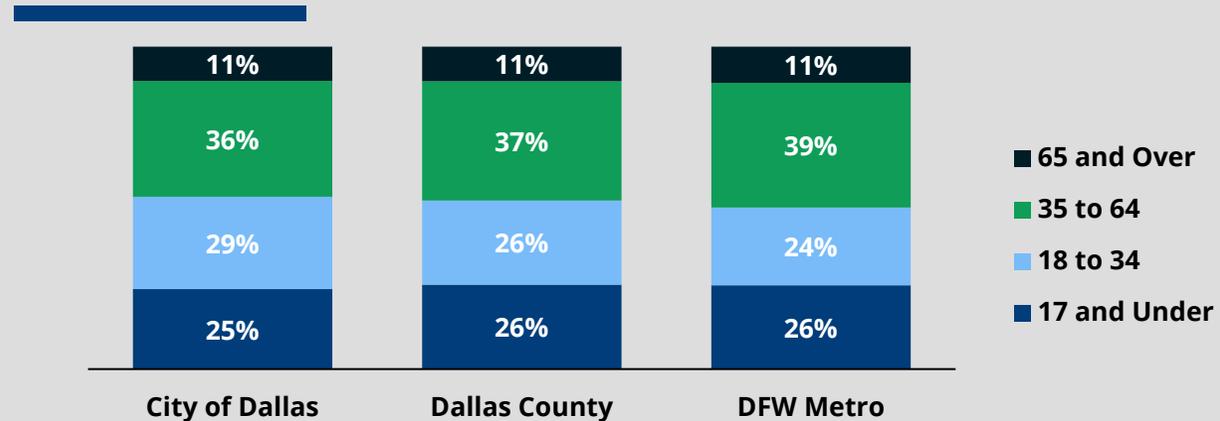
The City of Dallas has a median age of 32.9, slightly lower than the metro area (33.2) and the lowest of Texas' four largest cities (Houston, Dallas, Austin, San Antonio).

The age distribution of residents has remained relatively consistent since 2011, with a slight increase in seniors 65 and over and a slight decrease in children below the age of 18, in line with national trends.

**City of Dallas Age Distribution (2011-2021)**



**Comparative Age Distribution (2021)**



## DEMOGRAPHIC OVERVIEW | **MEDIAN INCOME**

While the City of Dallas' median income has increased rapidly since 2011, it remains below both the county and the DFW Metro, at \$58,200.

The median Dallas household makes about \$6,700 less than their counterparts in Dallas County and \$11,900 less than the median household in the metro area.

This is partly due to the city's lower average household size—the median one-person household in the City of Dallas earns \$41,300, only about \$1,500 and \$2,000 less than their county and metro area counterparts, respectively.

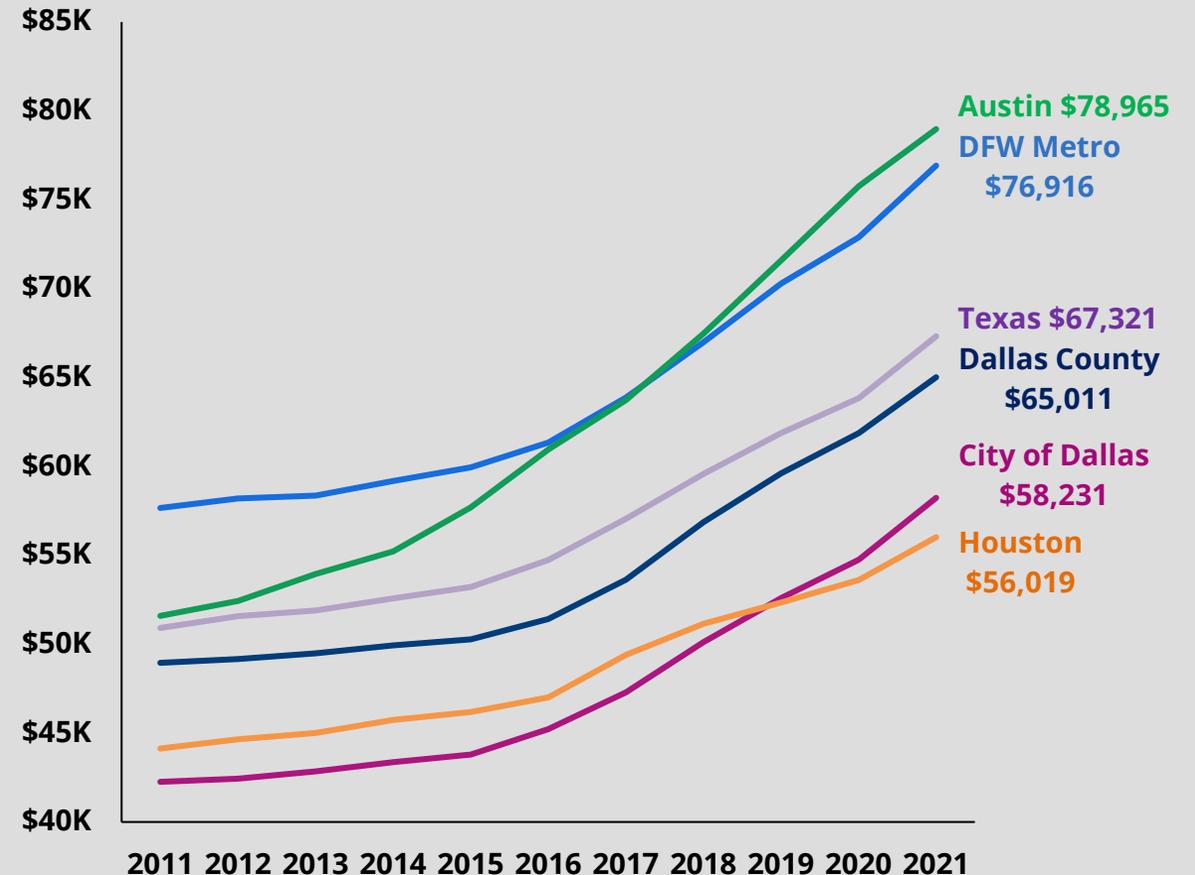
However, for families of 4, the median household in the city earns \$72,500, compared to \$81,700 (+\$9,200) in the county and \$108,000 (+\$35,500) in the metro.

Median Income	2011	2021	Change	Delta
City of Dallas	\$42,259	\$58,231	\$15,972	+37.8%
Dallas County	\$48,942	\$65,011	\$16,069	+32.8%
DFW Metro	\$57,658	\$76,916	\$19,258	+33.4%
Austin	\$51,596	\$78,965	\$27,369	+53.0%
Houston	\$44,124	\$56,019	\$11,895	+27.0%

**Note:** All income data and rent data is nominal.

**Source(s):** ACS 2011-2021 5-year estimates, B19013: Median Household Income.

### Comparative Median Income (2011-2021)

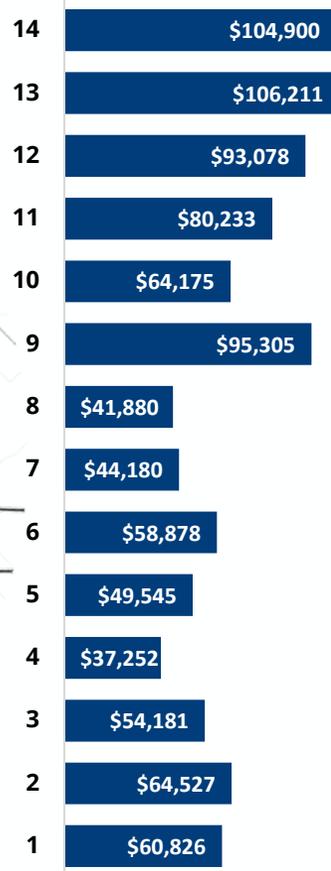


## DEMOGRAPHIC OVERVIEW | MEDIAN INCOME

Median incomes have grown unequally across council districts, with the greatest growth in areas that were already high-income—mostly in the north and central parts of the city.

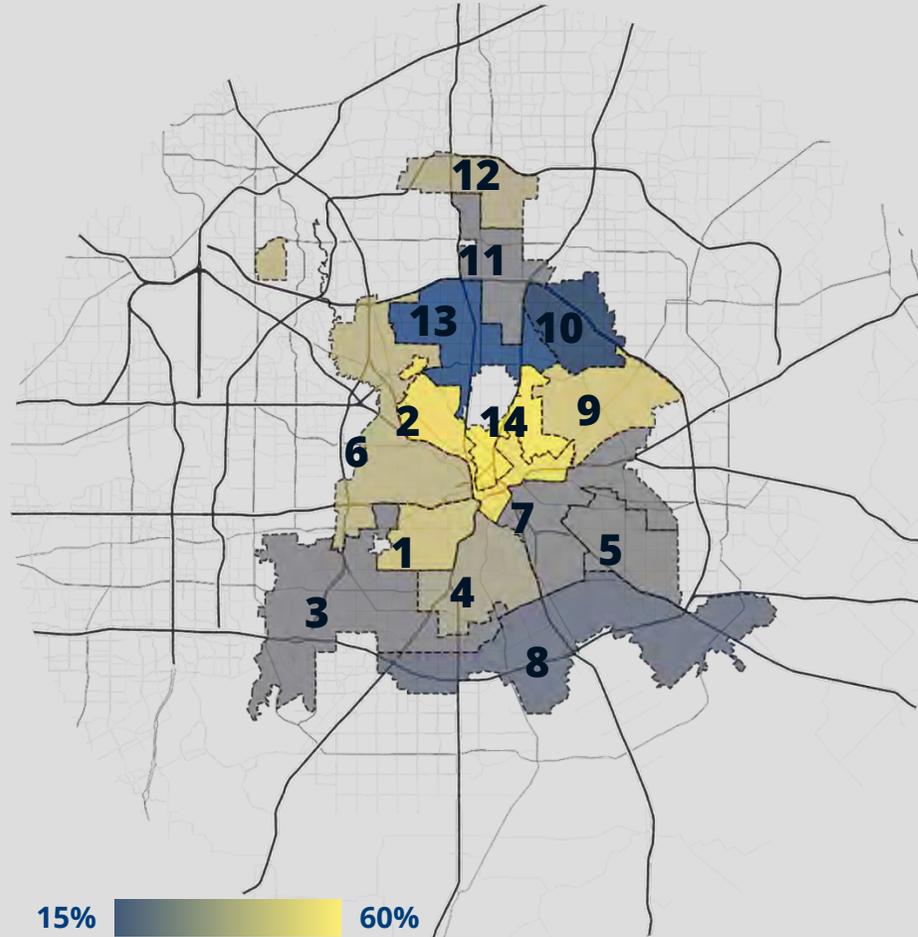
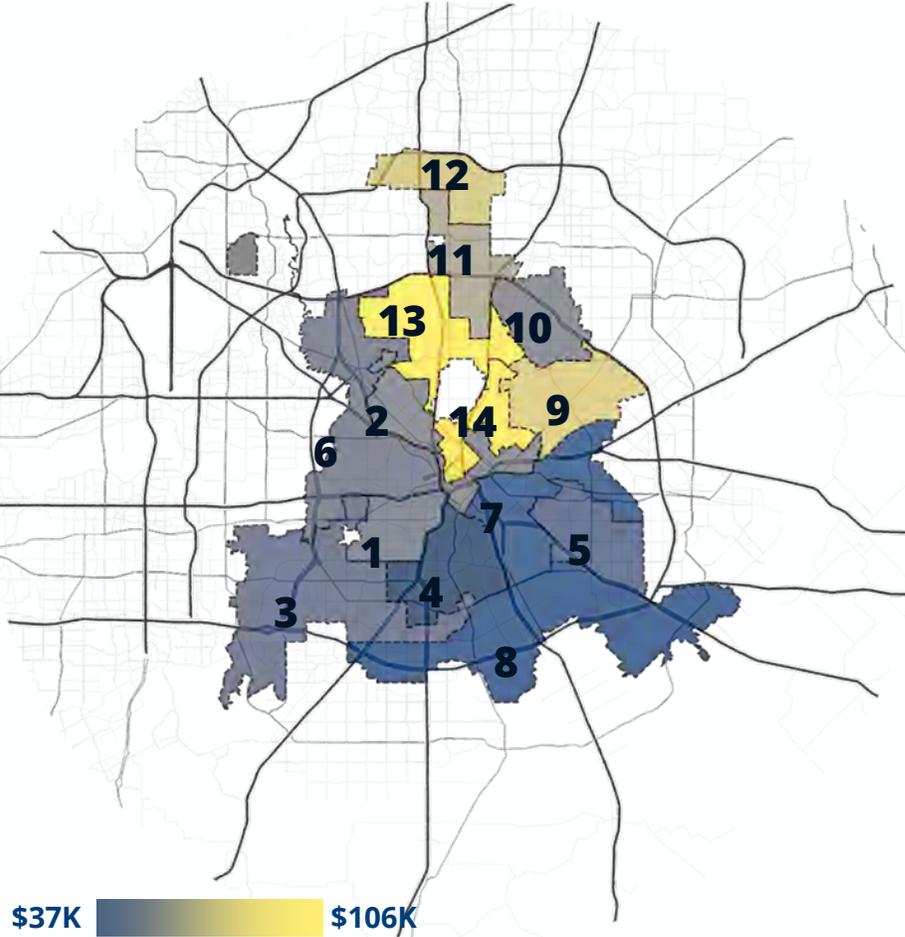
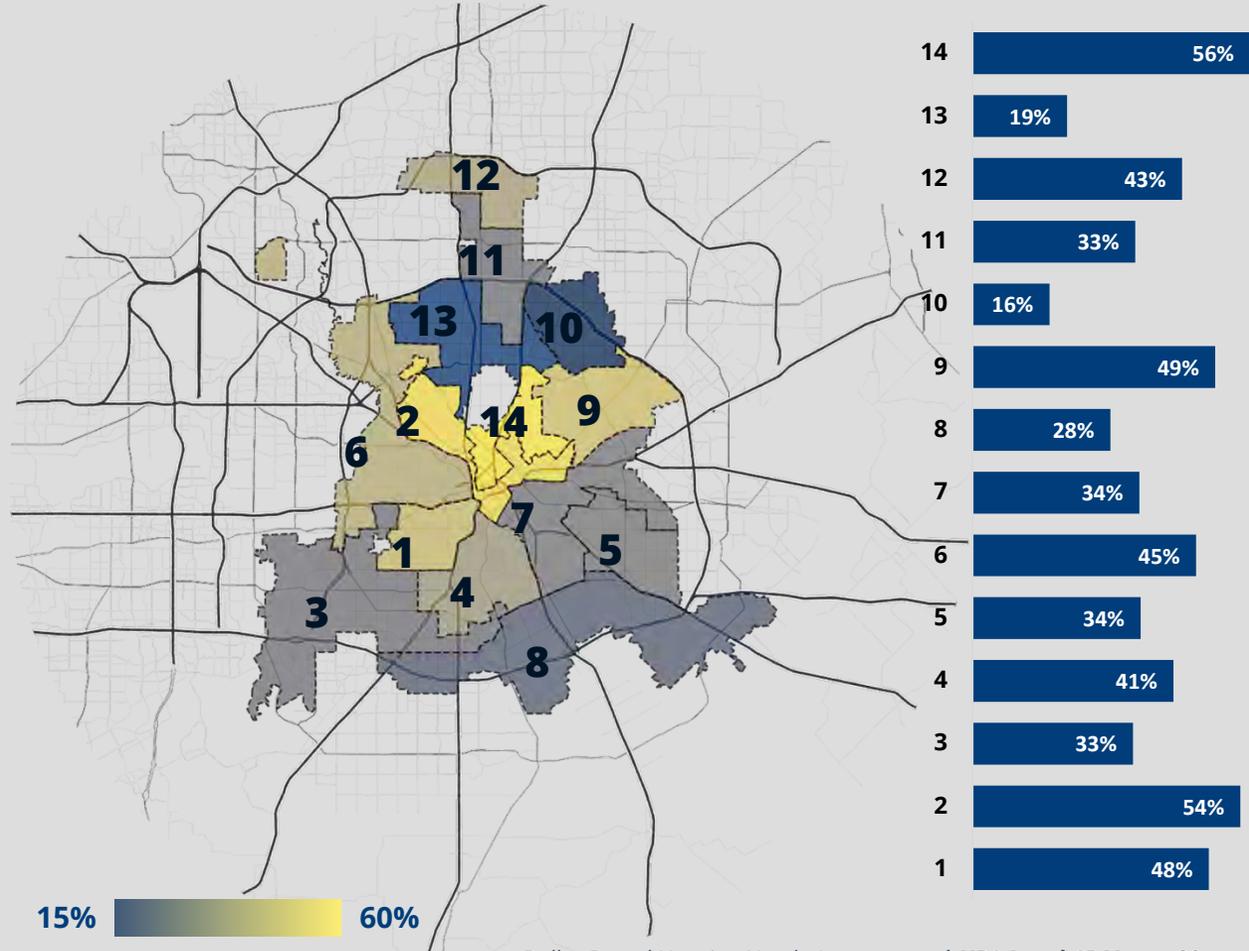
### Median Income (2021)

By Council Member District



### Change in Median Income (2011-2021)

By Council Member District



Source(s): ACS 2011-2021 5-year estimates, B19013: Median Household Income.

## DEMOGRAPHIC OVERVIEW | RACE AND ETHNICITY

Non-White households account for 88% of total household growth since 2011, with 24,100 net new Hispanic/Latino and 20,350 new Black households in the City of Dallas.

Household population grew across all racial and ethnic groups in the city population, with the largest relative increases for Asian households (+41%, 5,840) and Other households (+27%, 15,249).

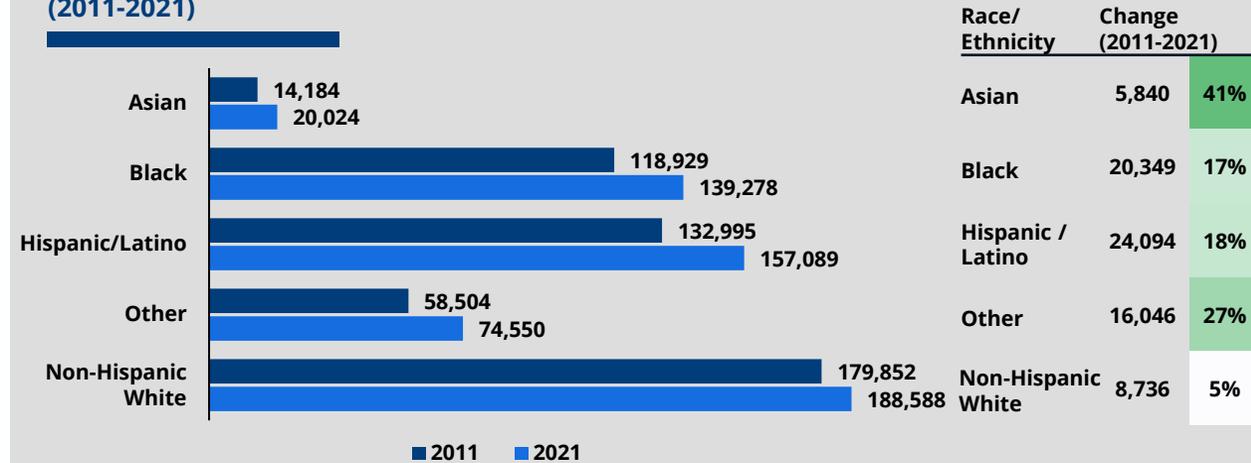
Relative to the metro, the City of Dallas has more Black, Hispanic/Latino, and Other households (mostly comprised of multi-racial households), while about half of the households in the metro area are non-Hispanic White.

### Comparative Household Distribution by Race/Ethnicity (2021)

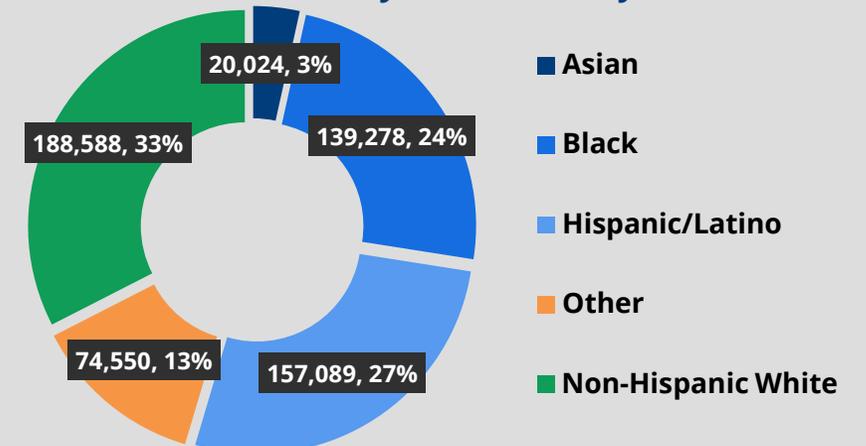
Household Race / Ethnicity	City of Dallas	Dallas-Fort Worth Metro
Asian	3.5%	6.6%
Black	24.0%	17.2%
Hispanic / Latino	27.1%	22.2%
Other	12.9%	2.3%
Non-Hispanic White	32.5%	51.7%

Source(s): ACS 2011-2021 5-year estimates, B02001: Race, B03002: Hispanic or Latino Origin by Race.

### City of Dallas Households by Race/Ethnicity (2011-2021)



### City of Dallas Household Distribution by Race/Ethnicity (2021)

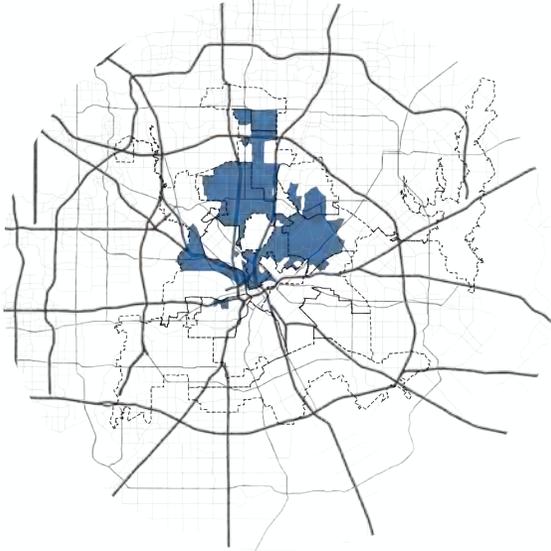


## DEMOGRAPHIC OVERVIEW | RACE AND ETHNICITY

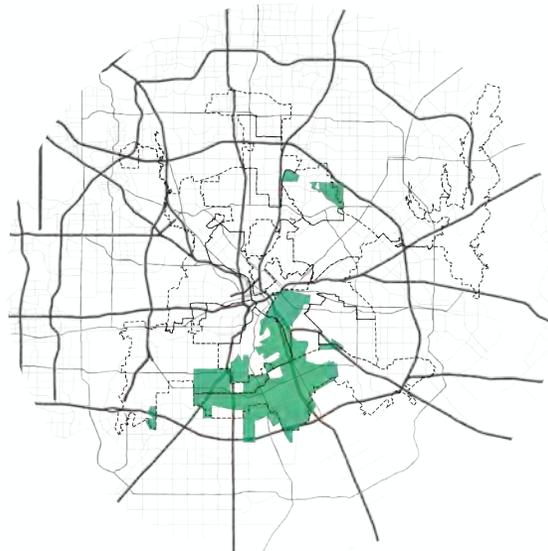
Despite a diverse population, Dallas' racial and ethnic groups are quite segregated. Over 70% of the population lives in a Census tract in which one group is more than 50% of the population.

### City of Dallas Census Tract by Majority Race/Ethnicity (2021)

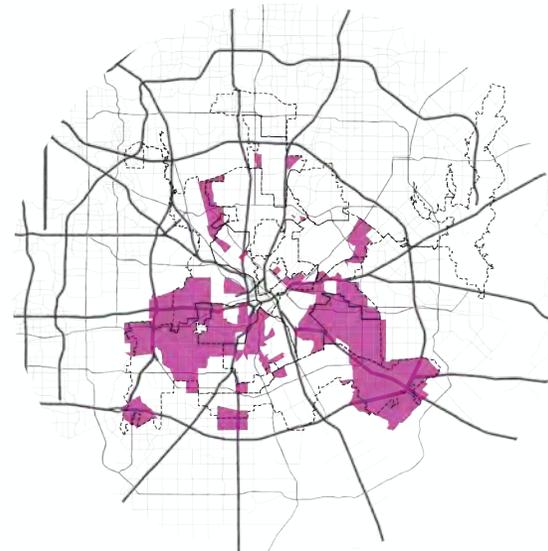
#### Non-Hispanic White



#### Black



#### Hispanic / Latino



#### No Majority Race/Ethnicity



One measure of segregation is a **dissimilarity index**, which compares the proportion of racial groups in census tracts to the proportion of racial groups in the overall city. The index ranges from 0 (complete integration) to 1 (complete segregation), with higher values indicating greater segregation. Of all cities nationally with a population greater than 500,000, **Dallas ranks as the tenth most segregated city** (out of 38 cities) and the **most segregated large city in Texas**.

## DEMOGRAPHIC OVERVIEW | RACE AND ETHNICITY

Despite steady gains in median income across racial groups, the income gap between non-Hispanic White households and Black and Hispanic/Latino households has widened in the City of Dallas.

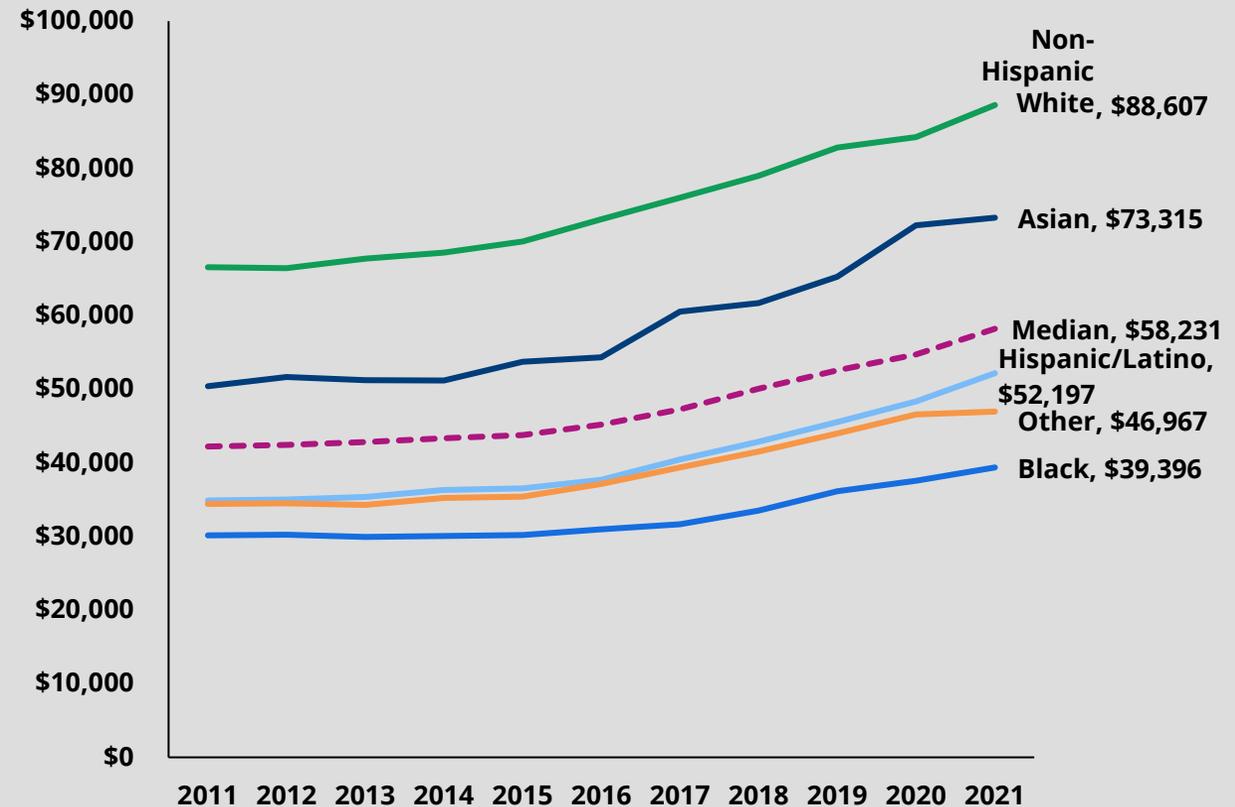
While incomes have grown across all racial groups, they have grown the slowest for Black households, who have a median income of \$39,400, up 31% from 2011, and remain \$18,800 below the overall median household income. Hispanic/Latino and Asian households' median incomes grew the fastest in the last decade at 45% and 50% respectively.

The median non-Hispanic White household has a household income that is \$49,200 more than the median Black household in Dallas—which has widened from \$36,400 in 2011.

**City of Dallas Median Income by Race/Ethnicity (2011-2021)**

Race / Ethnicity	2011	2021	Change		Diff. from N-H White Med. Income
Median	\$42,259	\$58,231	\$15,972	38%	-\$30,376
Asian	\$50,431	\$73,315	\$22,884	45%	-\$15,292
Black	\$30,154	\$39,396	\$9,242	31%	-\$49,211
Hispanic/Latino	\$34,908	\$52,197	\$17,289	50%	-\$36,410
Other	\$34,433	\$46,967	\$12,534	36%	-\$41,640
Non-Hispanic White	\$66,573	\$88,607	\$22,034	33%	\$0

**City of Dallas Median Income by Race/Ethnicity (2011-2021)**



Source(s): ACS 2011-2021 5-year estimates, B19013 (A, B, C, D, E, F, G, H, I): Median Household Income (By Race).

## DEMOGRAPHIC OVERVIEW | RACE AND ETHNICITY

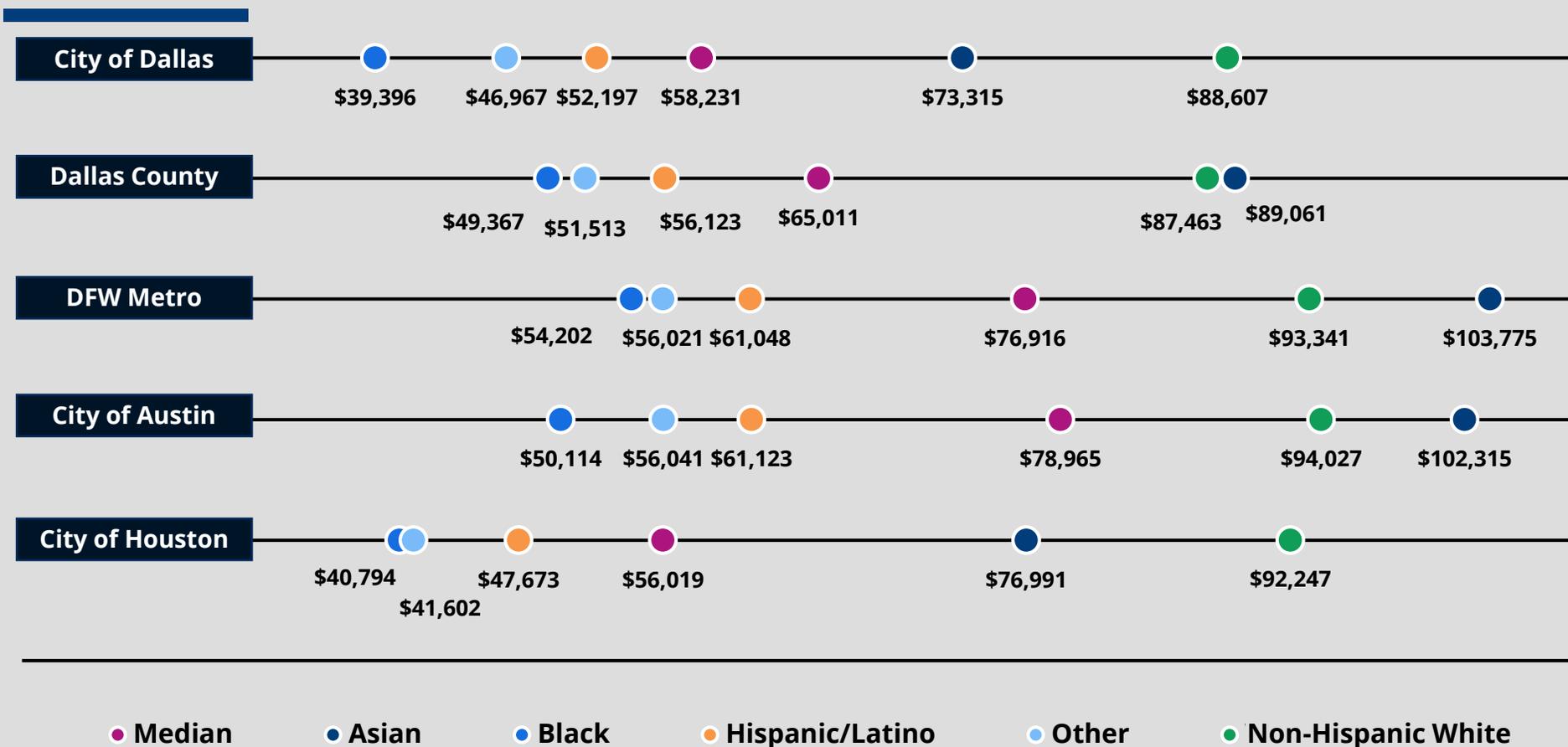
Dallas and Dallas County incomes are lower than DFW—The highest income Asian and Black households live outside the City while non-Hispanic White and Hispanic/Latino incomes are consistent across regions.

The disparity in median household incomes across the city, county, and metro vary widely by racial group.

Asian and Black households have the largest disparity—the median Black household in the City of Dallas has a household income of \$39,400—**25% less than the median Black household in Dallas County and 38% less than those in the metro region.** The median Asian household in the city earns 21% less than Asian households in the county and **42% less** than counterparts in the metro region.

Non-Hispanic White households in the city have a slightly higher income (1%) than those in the county and only 5% less than those in the metro region.

### Median Income by Race/Ethnicity (2021)



Source(s): ACS 2011-2021 5-year estimates, B19013 (A, B, C, D, E, F, G, H, I): Median Household Income (By Race).

## DEMOGRAPHIC OVERVIEW | TENURE

Renters represent 86% of the net growth in households over the last decade across the City of Dallas—driving down the city’s homeownership rate from 45 to 41%.

**The homeownership rate in Dallas has fallen from 45% in 2011 to 41% in the City of Dallas**—adding 53,800 new renter households, compared to only 8,900 new owner households. mirroring trends observed in large cities across the country. The cities in the metro that have seen homeownership fall the fastest are those with the highest levels of population growth—homeownership rates in Plano, Frisco, Allen, Grapevine, and Richardson have all fallen more than seven percentage points.

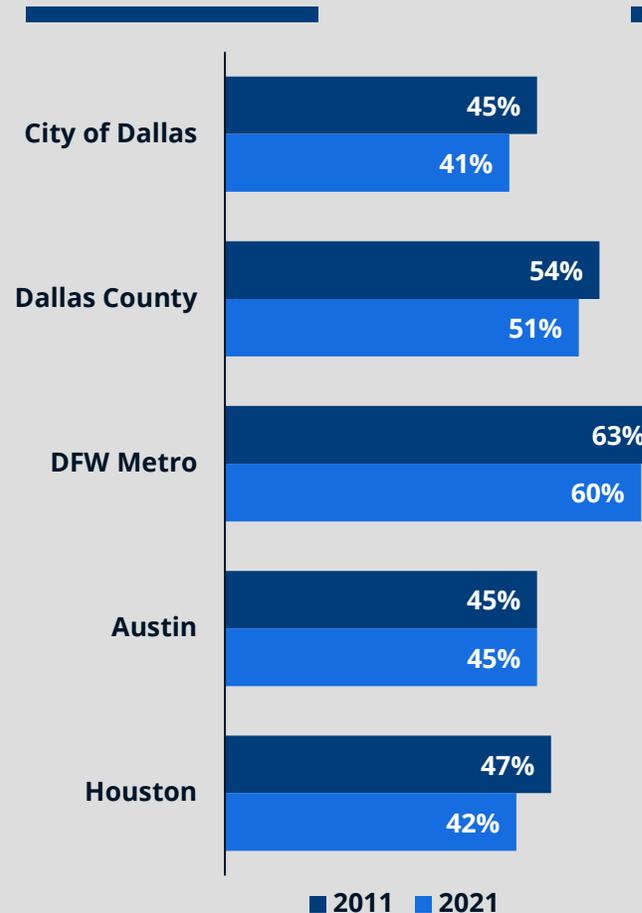
Homeownership in the Dallas-Fort Worth metro has fallen slightly less compared to the city—by three percentage points overall—and remains 19 points higher than the city.

### City of Dallas Households by Tenure

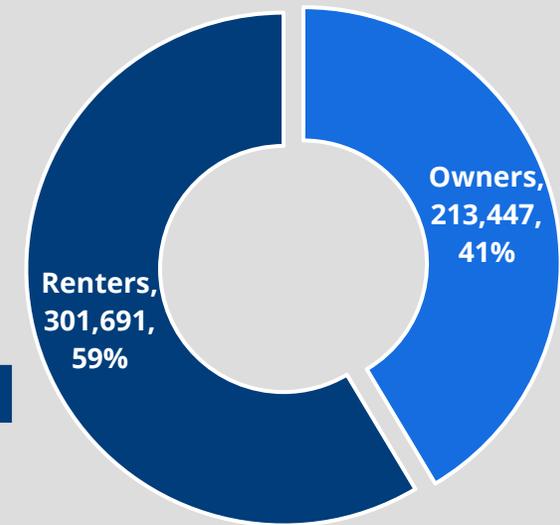
Tenure Type	2011	2021	Delta	Change
Owners	204,592	213,447	8,855	4%
Renters	247,895	301,691	53,796	22%
<b>Total</b>	<b>452,487</b>	<b>515,138</b>	<b>62,651</b>	<b>14%</b>

Source(s): ACS 2011-2021 5-year estimates, B25003: Tenure.

Homeownership Rate (2011-2021)



City of Dallas Households by Tenure (2021)



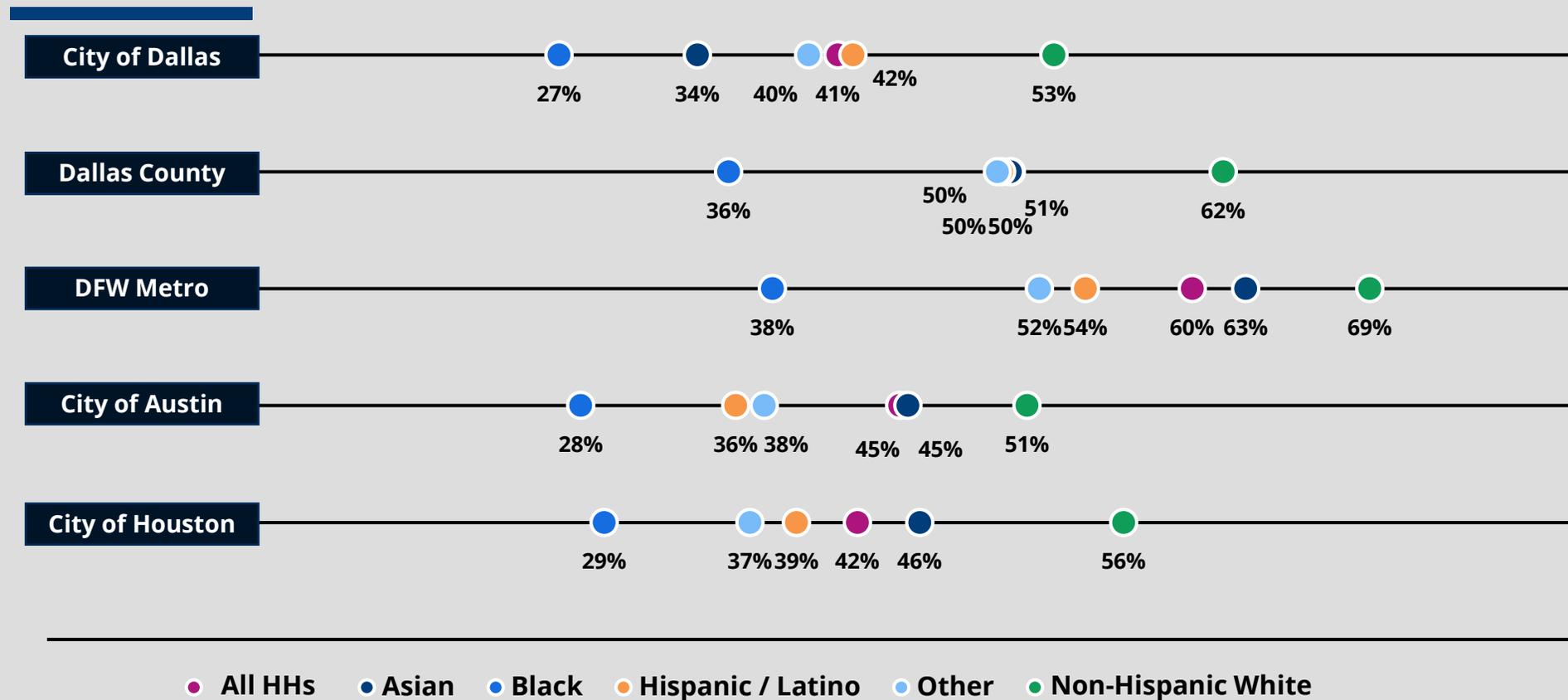
## DEMOGRAPHIC OVERVIEW | TENURE BY RACE AND ETHNICITY

The City of Dallas' Black homeownership rate is slightly lower than Austin and Houston and significantly lower than the greater metro.

The 26-point gap in Black and non-Hispanic White homeownership rates in the City of Dallas is comparable to Houston (27-point gap) and is slightly higher than Austin (23-point gap).

While the homeownership rate for all racial groups is higher in the county and metro area, so are the gaps between minority homeownership rates and the non-Hispanic White homeownership rate.

### Homeownership Rate by Race/Ethnicity (2021)



Source(s): ACS 2021 5-year estimates, B25003 (A, B, C, D, E, F, G, H, I): Tenure (By Race).

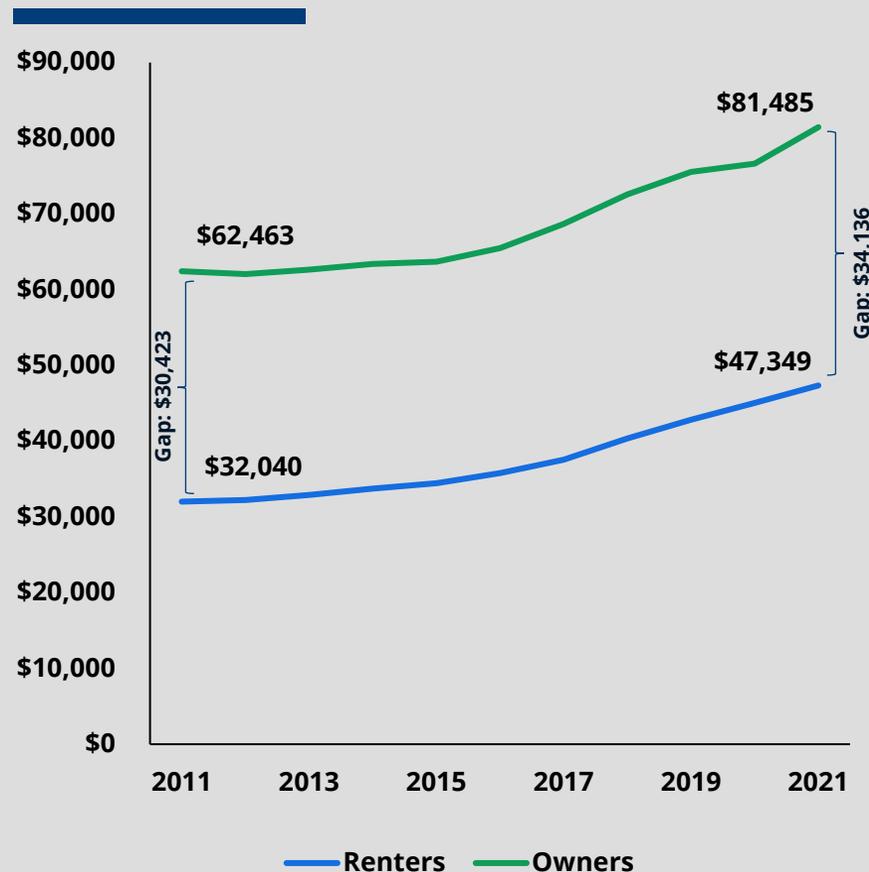
## DEMOGRAPHIC OVERVIEW | TENURE BY INCOME

While the median renter income has increased by 32% since 2011, the gap between the owner household income and median renter household income has increased by \$4,000.

The median owner household in the City of Dallas has an income of \$81,500—\$34,100 more than renter households in the city. This gap has increased from \$30,400 in 2011—a 12% jump, despite the increase in high income renter households.

Compared to median incomes in the county and metro area, City of Dallas owners and renters lag slightly behind their counterparts.

**City of Dallas Median Income by Tenure Type (2011-2021)**

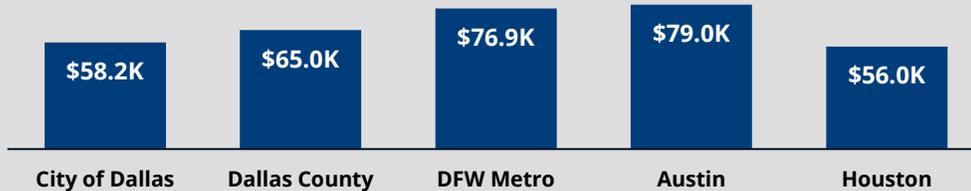


**Comparative Income by Tenure Type (2021)**

### Owner Households



### All Households



### Renter Households



**Source(s):** ACS 2011-2021 5-year estimates, B25119: Median Household Income by Tenure.

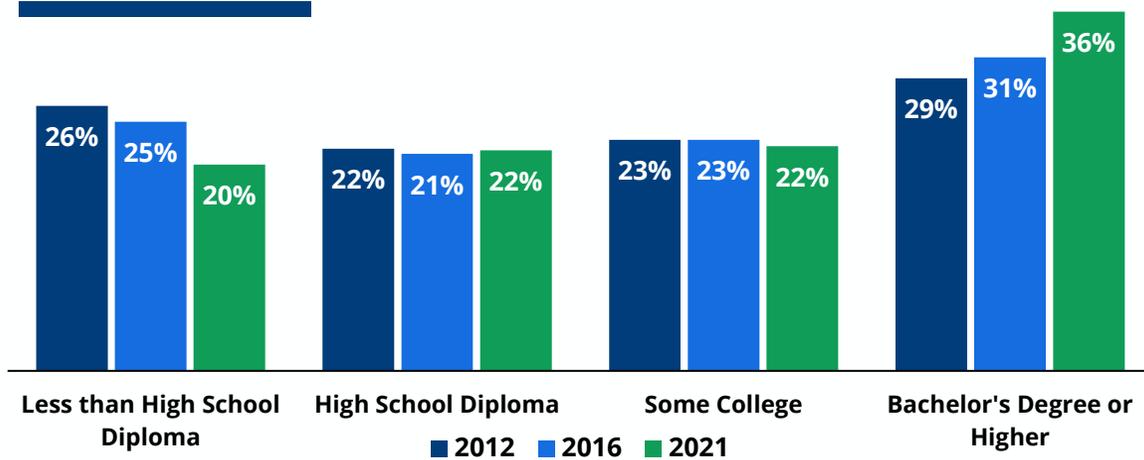
## DEMOGRAPHIC OVERVIEW | EDUCATIONAL ATTAINMENT

While educational attainment has increased rapidly in the City of Dallas, median rent has become unaffordable for residents with a bachelor's degree and is far out of reach for residents without a bachelor's degree.

Educational attainment has increased rapidly in the City of Dallas—with a six-point decrease in those without a high school diploma and a seven-point increase in those with a Bachelor's degree or higher.

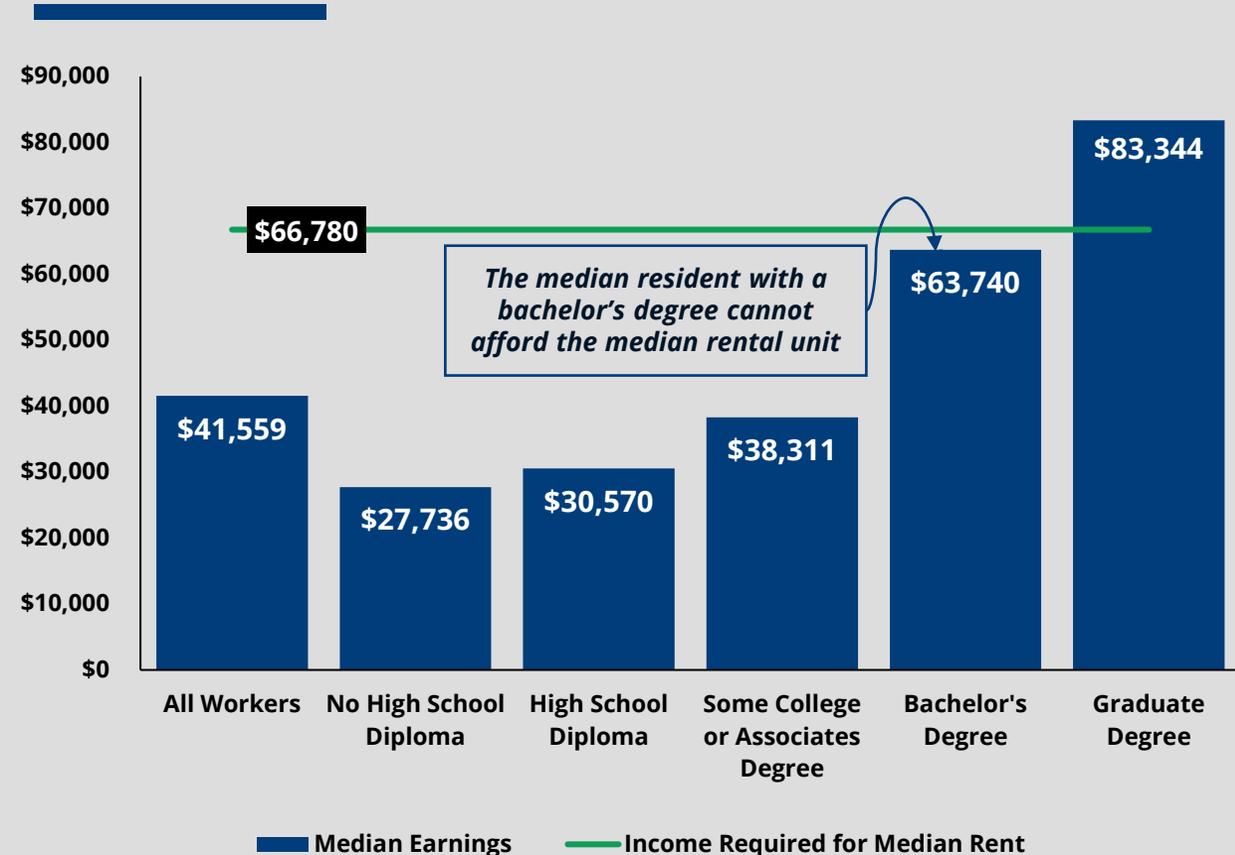
However, despite increases in educational attainment and the significant associated increases in median earnings—even the median resident with a Bachelor's degree cannot afford the median rental unit in the city.

**City of Dallas Educational Attainment (2012, 2016, 2021)**



*Source(s): ACS 2011-2021 5-year estimates, B15002: Sex by Educational Attainment for the Population 25 Years and Older, B20004: Median Earnings by Sex by Educational Attainment for the Population 25 Years and Older, B25064: Median Gross Rent.*

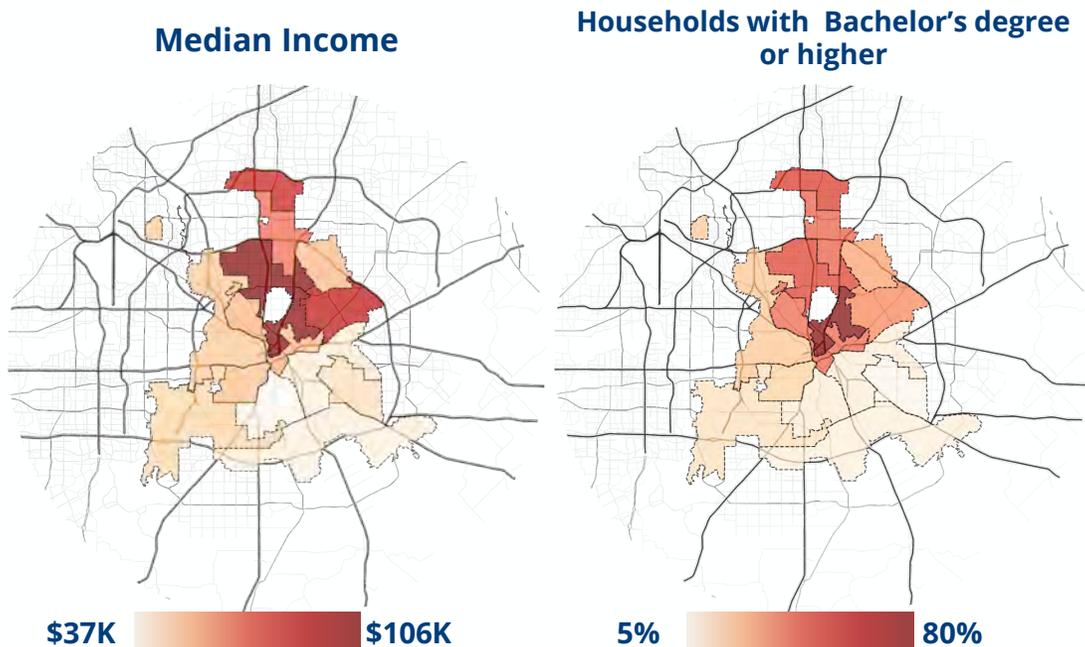
**Median Earnings by Educational Attainment and Income Required for Median Rent (2021)**



## DEMOGRAPHIC OVERVIEW | MEDIAN INCOME BY EDUCATIONAL ATTAINMENT

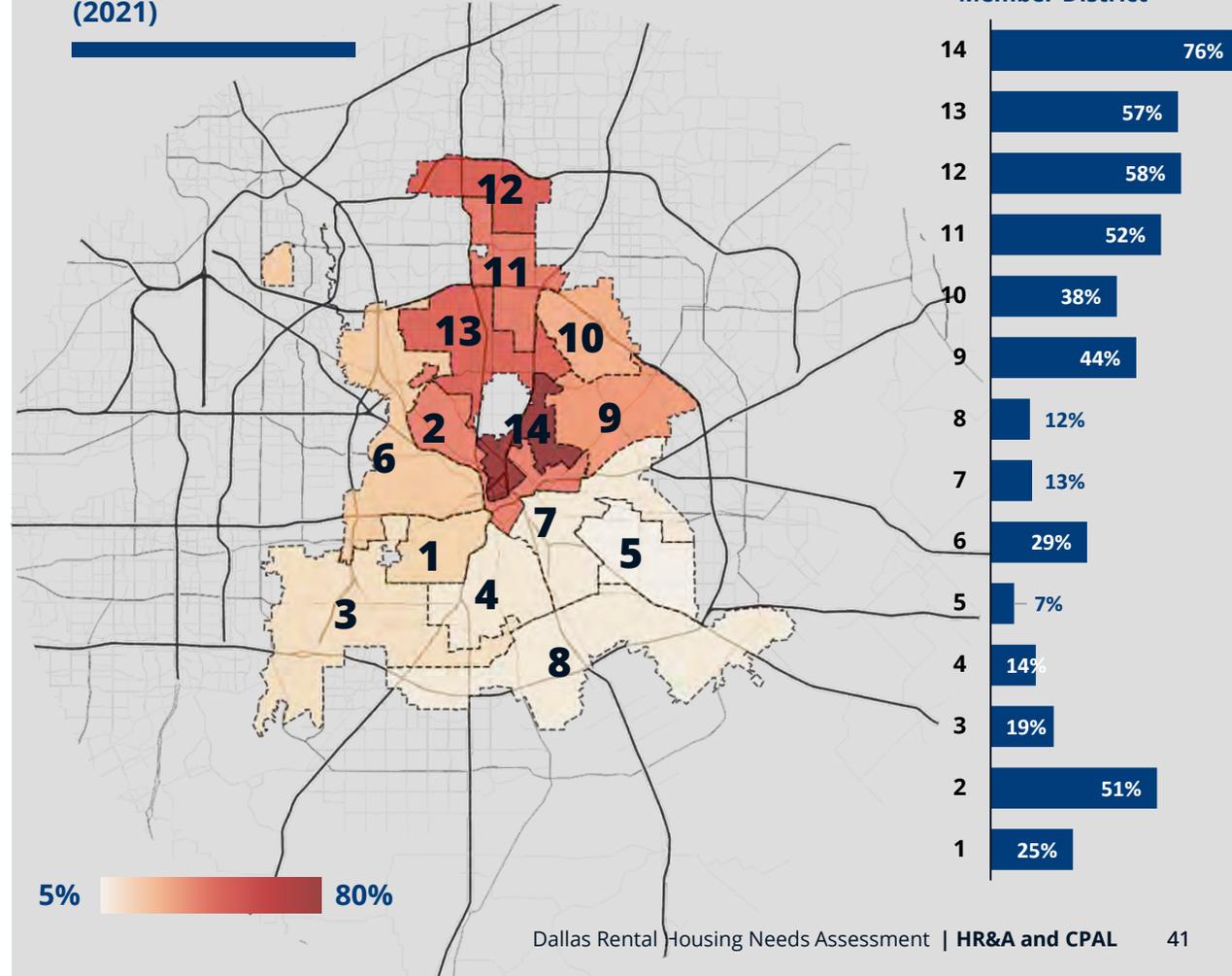
Within the City of Dallas, there is a wide disparity of educational attainment levels. 80%+ in central Council District 14 have a Bachelor's degree or higher, compared to less than 20% in southern council districts.

Educational attainment closely tracks median income, homeownership, and other socio-economic indicators across the city. The same trends always emerge—with a stark divide between the northern and southern portions of the city.



Source(s): ACS 2021 5-year estimates, B19013: Median Household Income, B25013: Tenure by Educational Attainment of Householder.

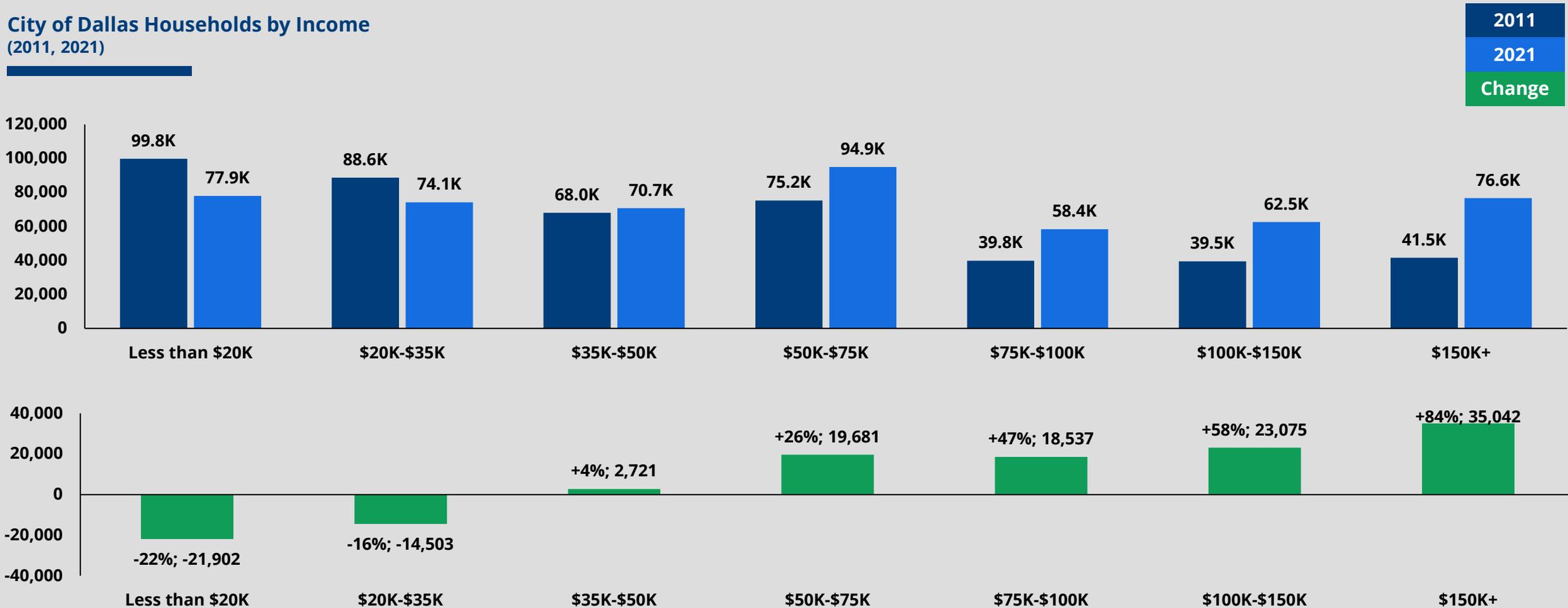
### Households with a Bachelor's Degree or Higher (2021)



## DEMOGRAPHIC OVERVIEW | HOUSEHOLD INCOME

92% of net household growth since 2011 is attributed to households earning more than \$100,000—due to a rise in wages, an inflow of higher income households, and an outflow of lower income households.

City of Dallas Households by Income  
(2011, 2021)



Source(s): ACS 2011-2021 5-Year Estimates, B19001: Household Income.  
Includes all households (renters and homeowners)

## DEMOGRAPHIC OVERVIEW | INCOME BY TENURE

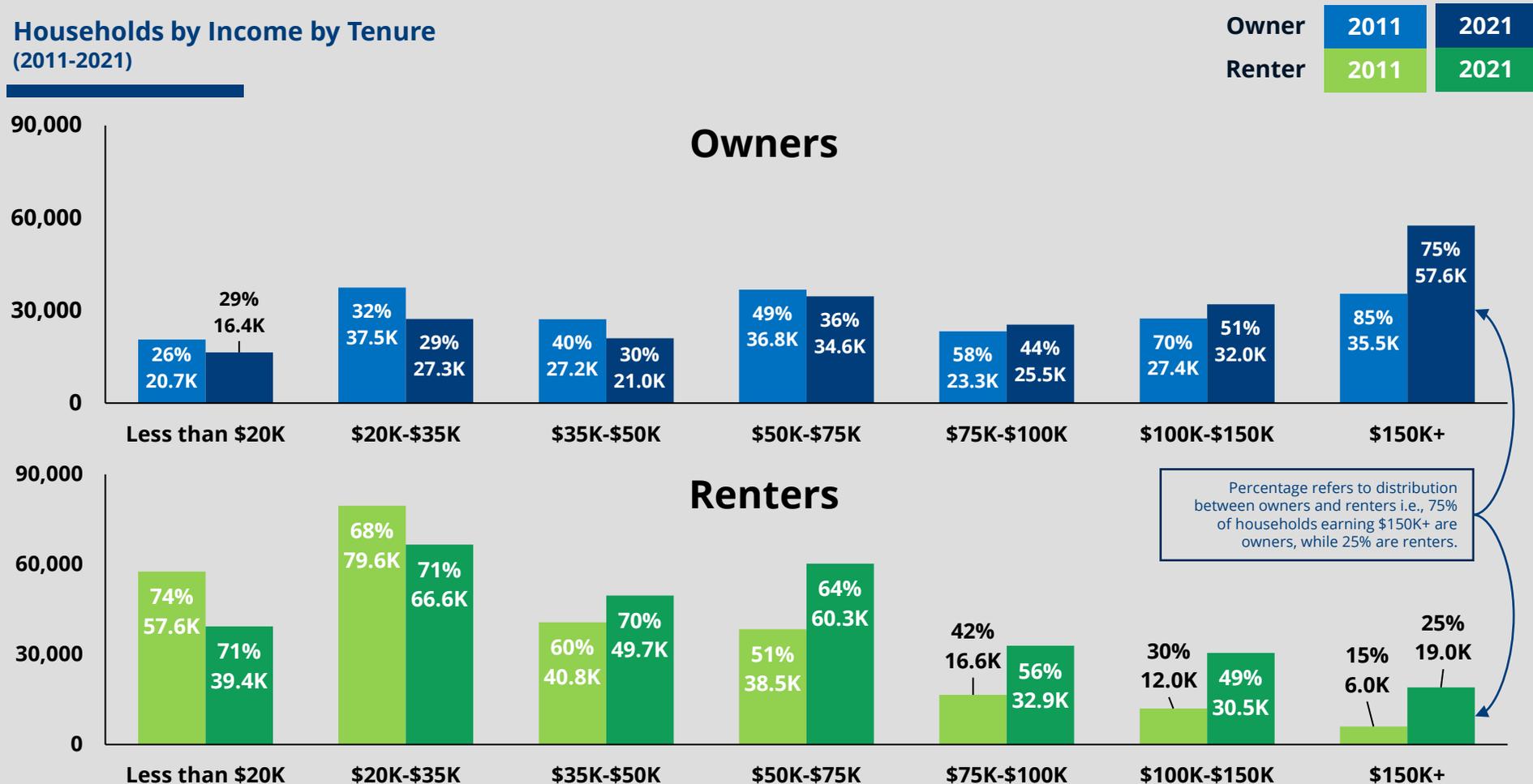
Higher income households are much more likely to be renters than a decade ago. In 2011, one in five households (21%) earning more than \$100,000 were renters, compared to two in five (38%) in 2021.

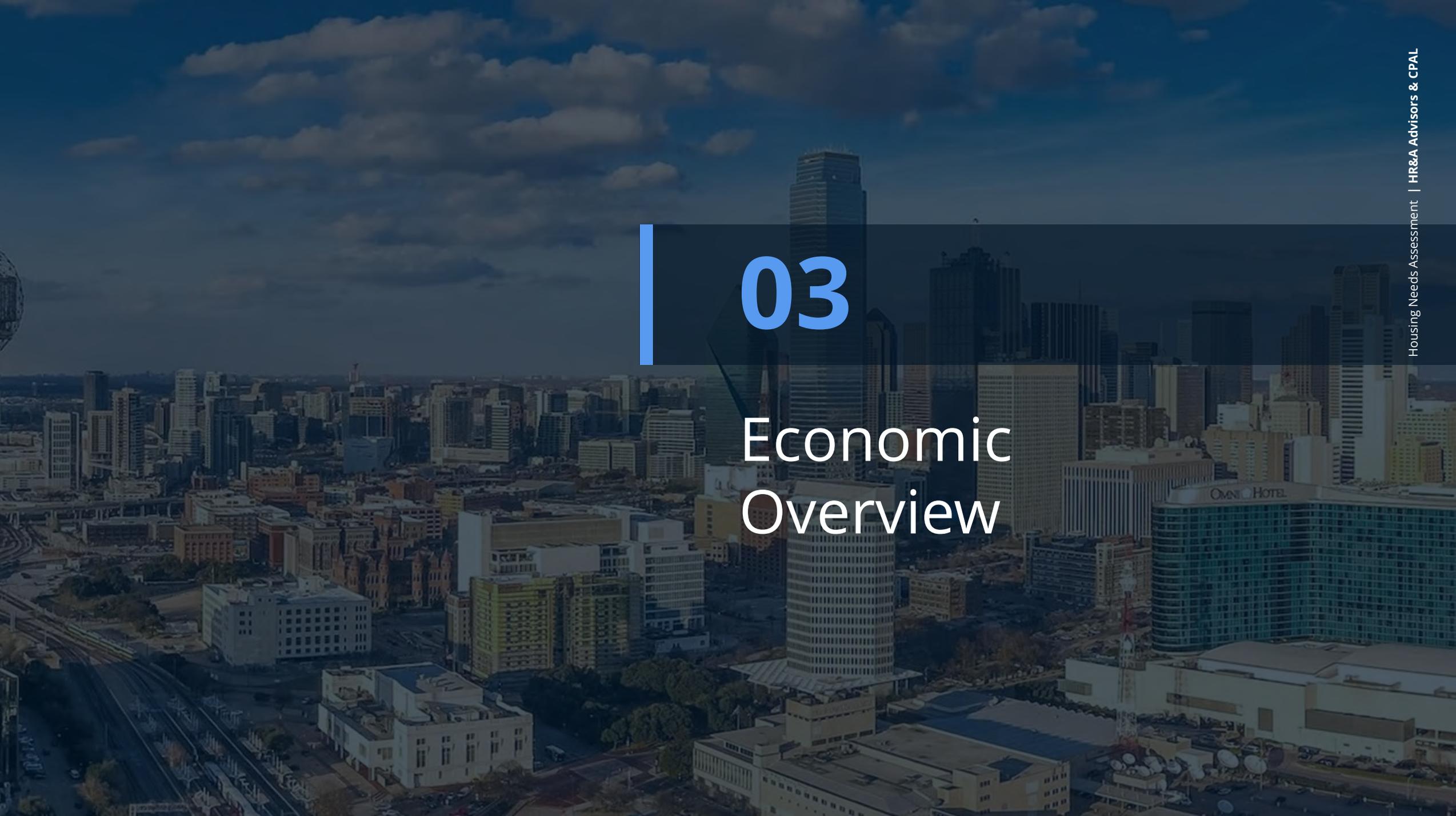
Though renter household earnings have increased in the last decade, home prices have increased faster, precluding many renter households from making the transition to homeowners.

In 2011, the income required to purchase the median priced home was around \$57,000 and the median renter income was \$32,000. In 2022, due to both interest rate and price pressure, **the median income required to purchase the median home has jumped to \$92,000 while the median renter income is just \$47,000.**

*Source(s): ACS 2011-2021 5-year estimates, B25118: Tenure by Household Income, Zillow Median Listing Price, Average 30-year interest rates accessed through FRED; Dallas County Tax Assessor Millage Rates.*

**Households by Income by Tenure (2011-2021)**





03

# Economic Overview

# Key Takeaways

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- 1 The Dallas-Fort Worth metro area has surpassed its pre-pandemic employment levels, adding 278,000 net new jobs between February 2020 and December 2022, with an **unemployment rate below 3.4%**.
- 2 The metro area has a diverse set of jobs, but **lower-paying retail, service, and support jobs represent about 40% of the total labor pool** and is projected to stay constant in 2030.
- 3 The city, county, and metro all have a labor force participation rate of around **69%, an increase from around 66% in 2018** and higher than both state and national figures.
- 4 Projections suggest that the metro area will add an additional **625,000 net new jobs between 2023 and 2033**.

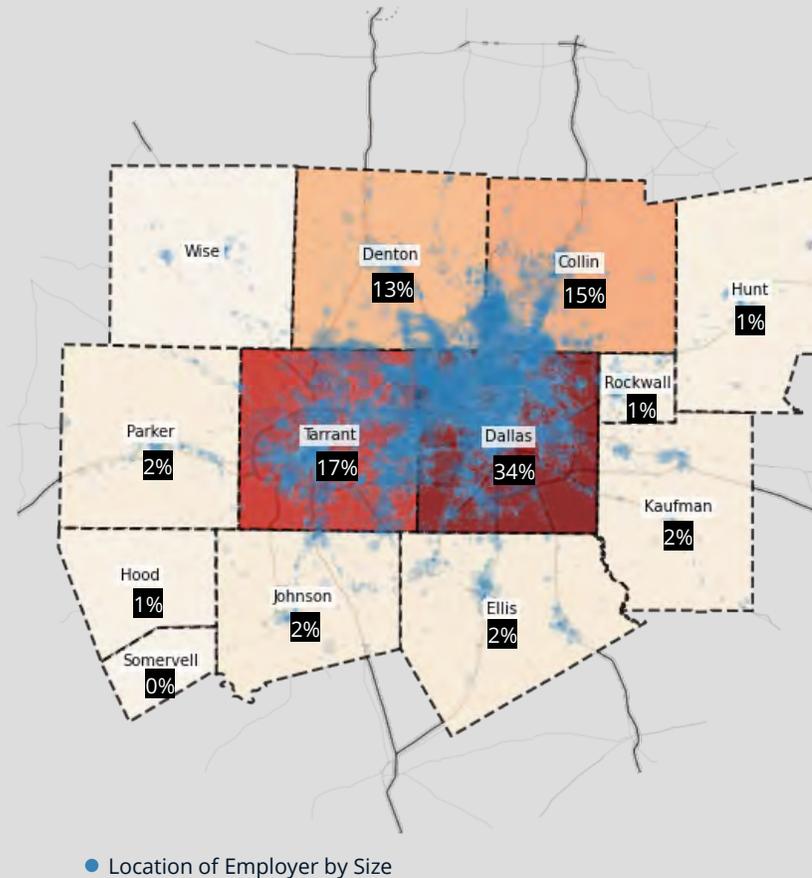
## ECONOMIC OVERVIEW | EMPLOYMENT

The Dallas-Fort Worth metro area has surpassed its pre-pandemic employment levels, adding 278,000 net new jobs between February 2020 and December 2022.

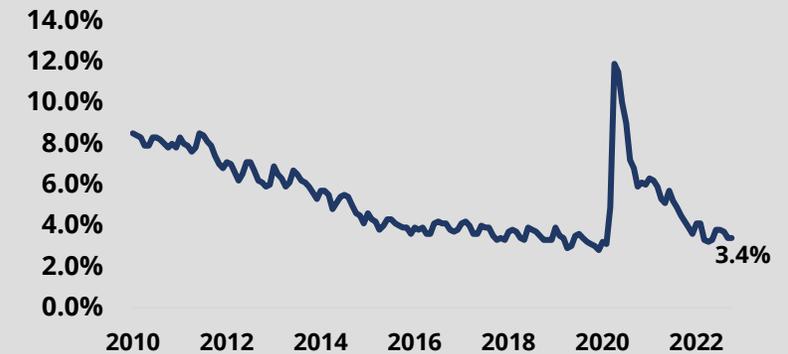
The Dallas-Fort Worth metro area job market has recovered strongly since the pandemic, with an unemployment rate below 4%, compared to a pandemic high of 11.5% in May 2020.

Jobs are increasingly distributed in the northern counties in the metro area. In 2010, 38% of all jobs in the metro area were in Dallas County, compared to 34% in 2022. The share of jobs located in Collin and Denton County increased by 6 points.

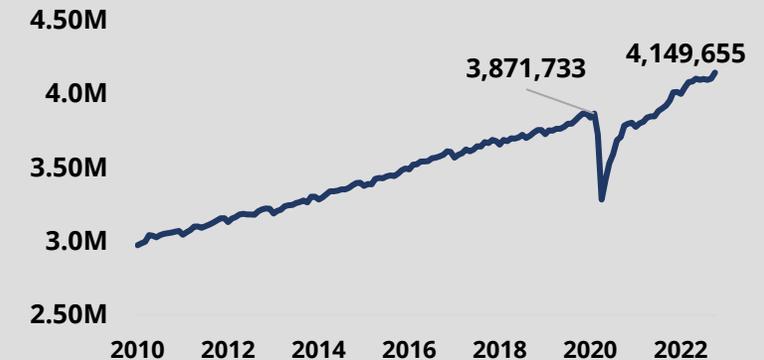
### DFW Share of Employment by County (2022)



### DFW Metro Unemployment Rate (2010-2022)



### DFW Metro Total Employment (2010-2022)



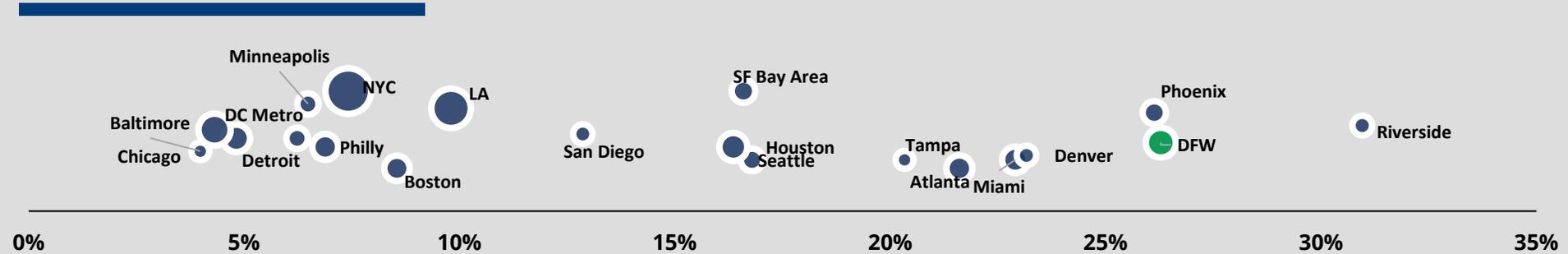
## ECONOMIC OVERVIEW | EMPLOYMENT

Over the last decade, jobs in the Dallas-Fort Worth metro increased by 26%, the second highest across the top twenty metros in the nation.

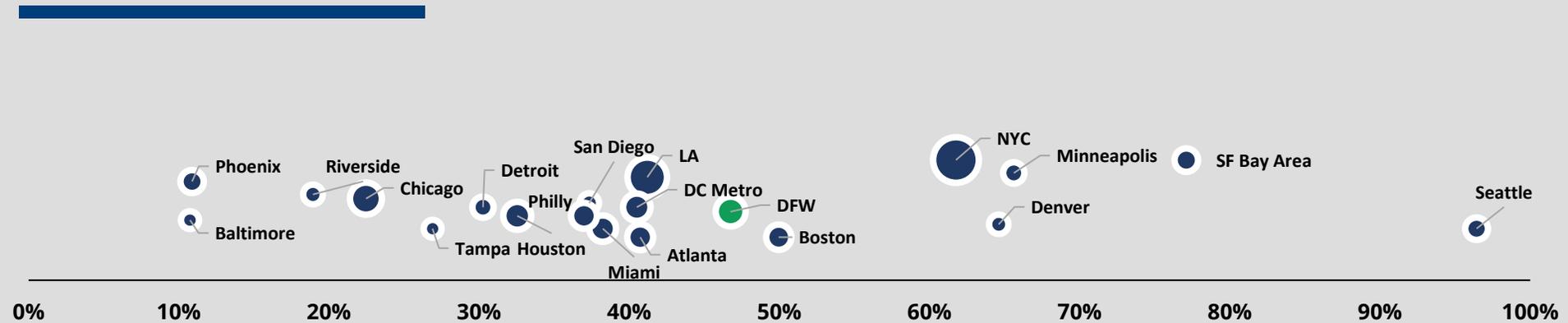
Along with the Phoenix and Riverside metro areas, jobs in the Dallas-Fort Worth metro area increased by more than 25% since the Great Recession.

For jobs with wages more than \$50,000, the Dallas-Fort Worth metro saw an increase of 46%. While this lags northeastern and west coast metros like Seattle and New York City, the metro leads among other sunbelt peers, like Atlanta, Miami, and Houston.

### Metro Area Change in Net Jobs (2012-2022)



### Metro Area Change in Net Jobs with Wages above \$50,000 (2012-2022)



**Source(s):** BLS QCEW Data, accessed through EMSI 2012-2022, Job Count by Occupation, Median Wage by Occupation. Top 20 Metro Areas by Population.

**Note:** The vertical position of the bubbles are randomized for legibility. The size of the bubbles correspond to the relative size of the employment market.

## ECONOMIC OVERVIEW | EMPLOYMENT AND AFFORDABILITY

Dallas-Fort Worth remains one of the more affordable metros in the country, with a lower home price to salary ratio compared to coastal peers but has been rapidly becoming less affordable.

The median home in the Dallas-Fort Worth metro area costs 7.5x the median salary—far below California metros like Los Angeles and the Bay Area—despite the higher median salaries in those metros.

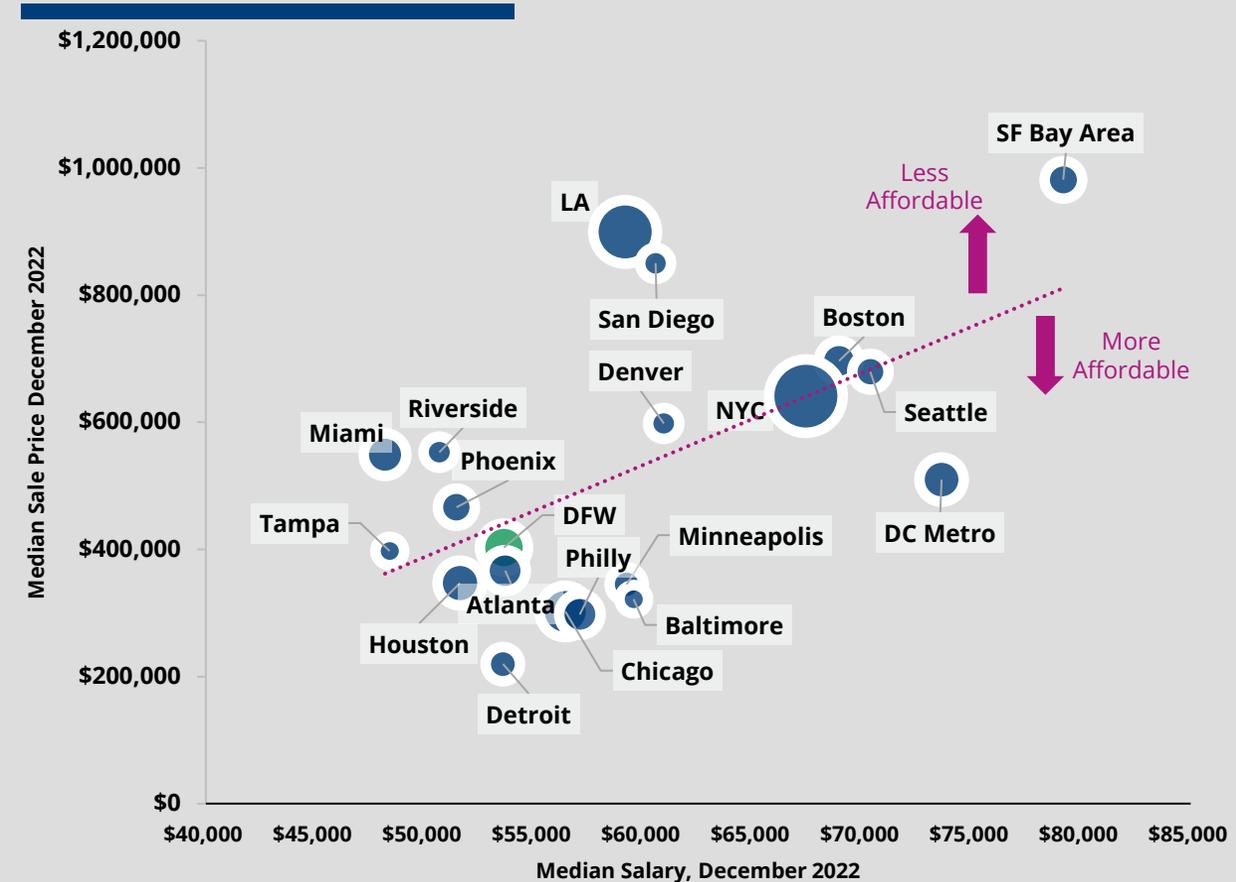
However, the Dallas metro area is less affordable than Houston and Atlanta by this metric, despite having slightly higher median wages, given higher sales prices.

Dallas-Fort Worth’s affordability has decreased precipitously and at an increasing rate. **In 2011, the median home cost 5x the median salary, 6.3x the median salary in 2018, and 7.5x in 2022.**

Common underwriting standards suggest a household income to home price ratio of 3x-5x for first-time homebuyers, which excludes most single-income households from homeownership.

Metropolitan Statistical Area	Median Salaries per Median Home
Los Angeles, CA	15.20
San Diego, CA	14.04
San Francisco Bay Area	12.39
Miami, FL	11.39
Riverside, CA	10.91
Boston, MA	10.10
Denver, CO	9.82
Seattle, WA	9.66
New York City	9.51
Phoenix, AZ	9.07
Tampa, FL	8.21
<b>Dallas-Fort Worth, TX</b>	<b>7.51</b>
Washington, DC	6.92
Atlanta, TX	6.83
Houston, TX	6.72
Minneapolis, MN	5.82
Baltimore, MD	5.40
Chicago, IL	5.36
Philadelphia, PA	5.22
Detroit, MI	4.10

Median Wage versus Median Home Sale Price (December 2022)



Source(s): BLS QCEW Median Wage by Occupation Data, accessed through EMSI. Zillow 2022, Median List Price. Top 20 Metro Areas by Population.

Note: The size of the bubble corresponds to the population of the metro area.

## ECONOMIC OVERVIEW | OCCUPATIONS

The metro area has a diverse set of jobs, but lower-paying retail, service, and support jobs represent about 40% of total jobs.

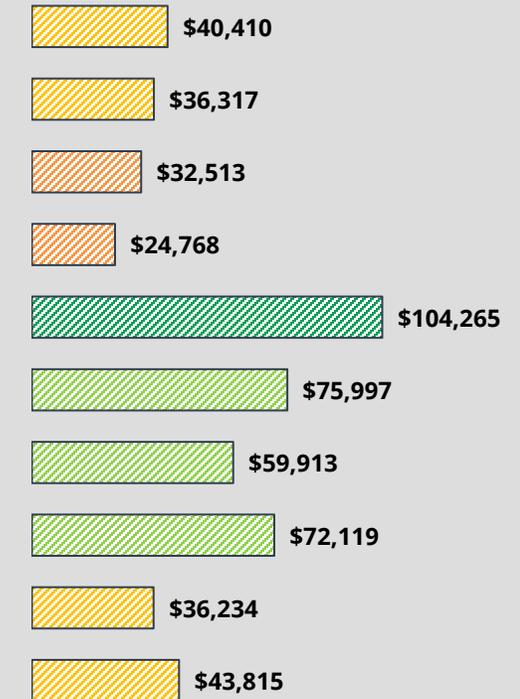
The four most common job types in Dallas pay \$40,500 or less.

However, between 2017-2022, the highest growth occupations were Management, Transportation, Business, and Computer Science jobs, indicating a shift towards higher-paying professional service sector jobs.

**Metro Area Employment by Occupation (2022)**



**Metro Area Median Wage by Occupation (2022)**



Low Income High Income

Source(s): BLS 2022, Employment by Industry, Median Wage by Industry.

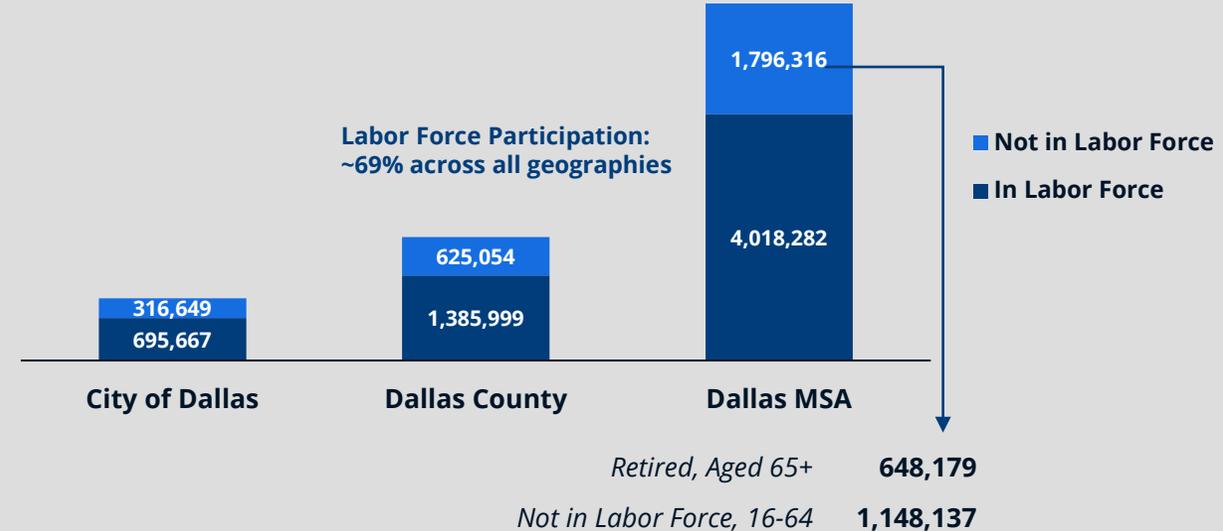
## ECONOMIC OVERVIEW | LABOR FORCE PARTICIPATION

The city, county, and metro all have a labor force participation rate of around 69%, an increase from around 66% in 2018 and higher than both state and national figures.

Despite stagnating labor force participation across Texas since 2018 (around 63.5%) and falling national labor force participation (from 63% to 62%), the Dallas region has had a significant increase in labor force participation—due to both a large increase available jobs in the region, and domestic and international in-migration to support these jobs.

A rise in the labor force participation rate suggests a larger percentage of the working-age population actively participating in the labor market and earning income. Dallas' affordability challenges despite a high share of workers in the region suggests that a lack of jobs are not a core driver—rather, the wages that these jobs offer and the lack of affordable supply drive housing challenges.

### Population Aged 16 and Above (2021)



## ECONOMIC OVERVIEW | FUTURE LABOR FORCE

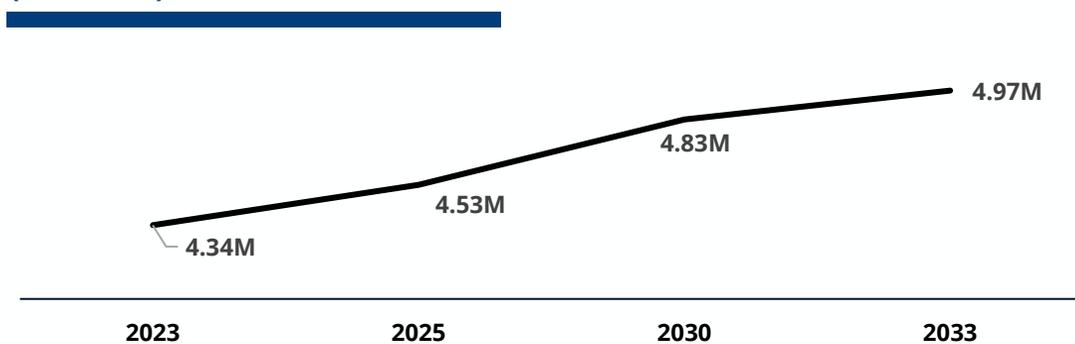
Projections suggest that by 2030 the metro area will net an additional 625,000 new jobs and that half of all jobs will pay less than \$50,000 in 2023 dollars.

Labor projections by [Lightcast](#)—a labor market analysis firm—project a 14% (625,000) increase in total net new jobs by 2033. While this is a significant projected increase, it is less than the 26% increase the region experienced in the previous decade.

Using Lightcast occupation-level projections, HR&A estimated the net change in jobs by projected salary and age range. These projections suggest that despite the increase in higher income jobs, the metro area will continue to have a long right tail, with a concentration of lower paying jobs under \$50,000.

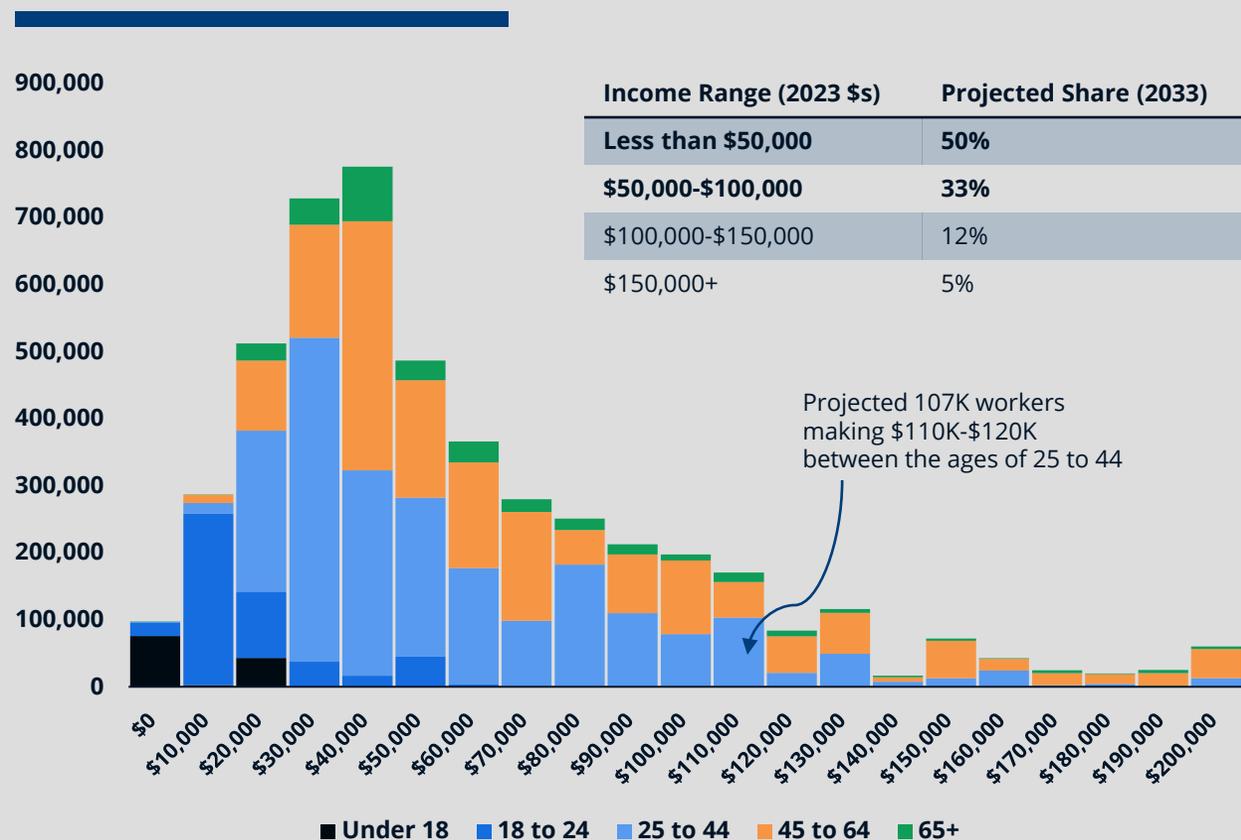
**An increase in occupations paying less than \$50K in wages increases the demand for housing affordable to low-income cohorts—already facing a large and growing housing gap.**

### Dallas-Fort Worth Metro Total Jobs (projected) (2023-2033)



*Source(s): Lightcast (EMSI Burning Glass) Projections, based on QCEW Estimates and Projections, 2023.*

### Metro Area Projected Workforce by Wage and Age (2030, in 2023 dollars)



## ECONOMIC OVERVIEW | FUTURE LABOR FORCE

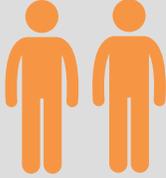
The housing affordability crisis is experienced differently by households of different sizes. There is a shortage of units for single-income households and a deeper shortage for single-income households with children.

Housing affordability is dependent on the household's income and size. Household income determines what a household can pay in rent, while the number and type of household members determine the adequate household size.

Assuming income earners hold the most common occupation in Dallas, single-income households experience a shortage of units, just 83 available for every 100 working adults and 66 available for every 100 working adults with a child. While there is an excess of units available to households with two working adults and those with two working adults with children, the same units are not affordable to single-income households.

### Rent Affordable by Family Type to the Most Common Employee (2021)

Most Common Occupation: **Office and Administrative Support, \$40.4K**

	 1 working adult	 1 working adult 1 child	 2 working adults	 2 working adults 2 children
<b>Income</b>	\$40,500	\$40,500	\$80,100	\$80,100
Rent Affordable	~\$1,000	~\$1,000	~\$2,000	~\$2,000
Unit Types	Studio/1-Bed+	2-Bed+	1-Bed+	3-Bed+
Units Available per 100 households	<b>83</b>	<b>66</b>	<b>185</b>	<b>112</b>

**Source(s):** BLS 2021 Employment by Industry, Median Wage by Industry, PUMS, ACS 2021 5-Year Estimates, Variables: HINCP, GRNTP, TEN, HR&A Calculations.



04

# Current Housing Needs

# Key Takeaways

- 1** Currently, almost **1 in 2 renters (48%) across the city are housing cost burdened**. For households earning below \$35,000, more than **9 in 10 renters** are housing cost burdened.
- 2** Vulnerable populations across the city often face increased cost burden—almost **three in four single parents with children living in the city are cost burdened**.
- 3** Dallas has added **6,600 new deed-restricted affordable units to the housing stock since 2010**, with a deed-restricted affordable housing stock of about **30,000 units (about 10% of the total rental housing stock)**.
- 4** There is a **33,660-unit gap** in affordable units available for households earning at or below 50% of AMI. For households at or below 30% of AMI, this gap increases to **44,280 units**.

*AMI stands for Area Median Income, a measure of the median income of a specific geographic area calculated by the Department of Housing and Urban Development (HUD). In the City of Dallas for 2021, 50% AMI is \$31,150 for a 1-person household; \$35,600 for a 2-person household; and \$40,050 for a 3-person household.*

## CURRENT HOUSING NEEDS | MOVING FROM INCOMES TO AMI

Supply gaps are calculated using Area Median Incomes (AMIs), which account for household size as well as income.

AMI stands for Area Median Income, which is a measure of the median income of a specific geographic area calculated by the Department of Housing and Urban Development (HUD) to determine eligibility for housing assistance programs.

HUD calculates AMI annually for each metropolitan area and non-metropolitan county in the United States. The calculation is based on the income levels of all households in the area, regardless of their tenure status (i.e., whether they own or rent their homes). The AMI for a specific area is then used as a benchmark for determining eligibility for various housing assistance programs.

For example, for the Low-Income Tax Credit Program, HUD's income limits are based on a percentage of the area's AMI. Generally, households with incomes at or below 60% of the area's AMI are eligible for assistance, while households with incomes between 60% and 80% of the AMI may also be eligible, depending on other factors such as family size and local rental market conditions.

Using AMIs serve as relative household income bands that can be compared over time—inflation and other economic pressures impact raw income but not their income relative to others.

**Source(s):** HUD User, PUMS 2021, Variables: HINCP, ADJINC, NP, GRNTP, HR&A Calculations ACS 2021 5-Year Estimates, Tenure by Household Size: B250009.

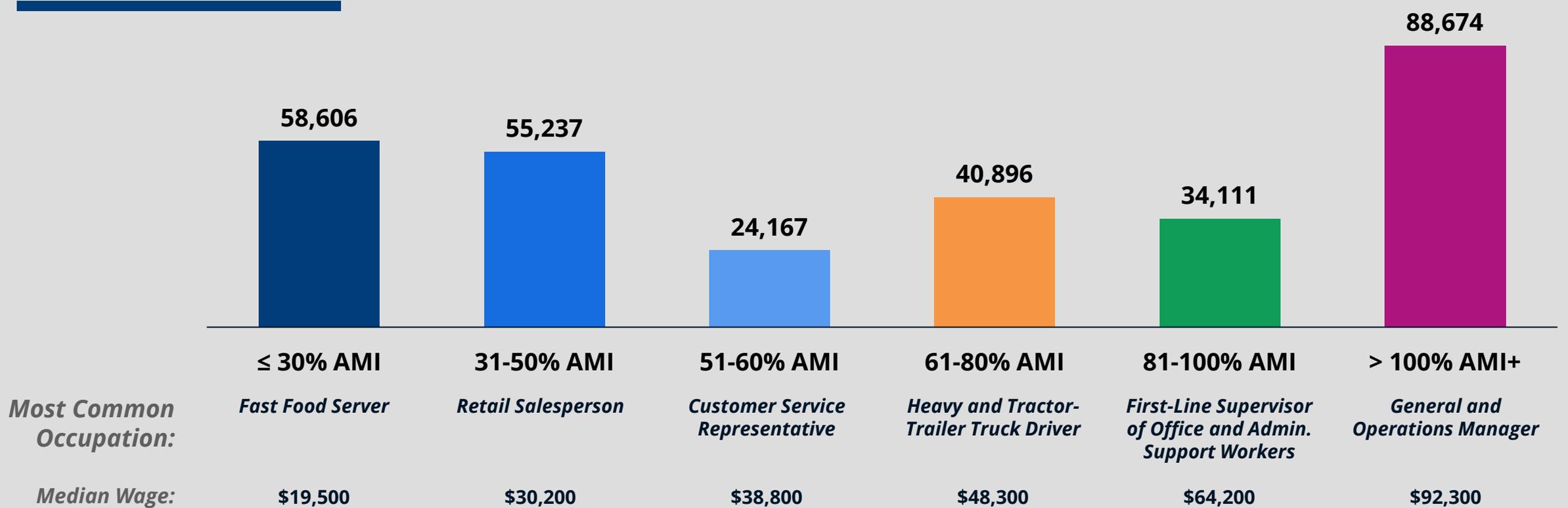
### City of Dallas AMI Table (2021)

Income Band	Household Size							
	1	2	3	4	5	6	7	8+
30% AMI	\$18,700	\$21,400	\$24,050	\$26,700	\$28,850	\$31,000	\$33,150	\$35,250
50% AMI	\$31,150	\$35,600	\$40,050	\$44,500	\$48,100	\$51,650	\$55,200	\$58,750
60% AMI	\$37,380	\$42,720	\$48,060	\$53,400	\$57,720	\$61,980	\$66,240	\$70,500
80% AMI	\$49,850	\$57,000	\$64,100	\$71,200	\$76,900	\$82,600	\$88,300	\$94,000
100% AMI	\$62,300	\$71,200	\$80,100	\$89,000	\$96,120	\$103,240	\$110,360	\$117,480

CURRENT HOUSING NEEDS | **MOVING FROM INCOMES TO AMI**

38% of renter households (113,843) in the City of Dallas are at or below 50% of AMI, with 20% (58,606) at or below 30% of AMI.

**City of Dallas Renter Households by AMI**  
(2021)



Source(s): HUD User, PUMS 2021, Variables: HINCP, ADJINC, NP, GRNTP, HR&A Calculations ACS 2021 5-Year Estimates, Tenure by Household Size: B250009.

## CURRENT HOUSING NEEDS | COST BURDEN

87% of all renters earning at or below 50% of AMI are housing cost burdened, spending more than 30% of their gross income on housing costs.

The mismatch between what people can afford and the supply of housing has led to an increasing number of households in Dallas to be cost burdened—spending more than 30% of their gross income on housing.

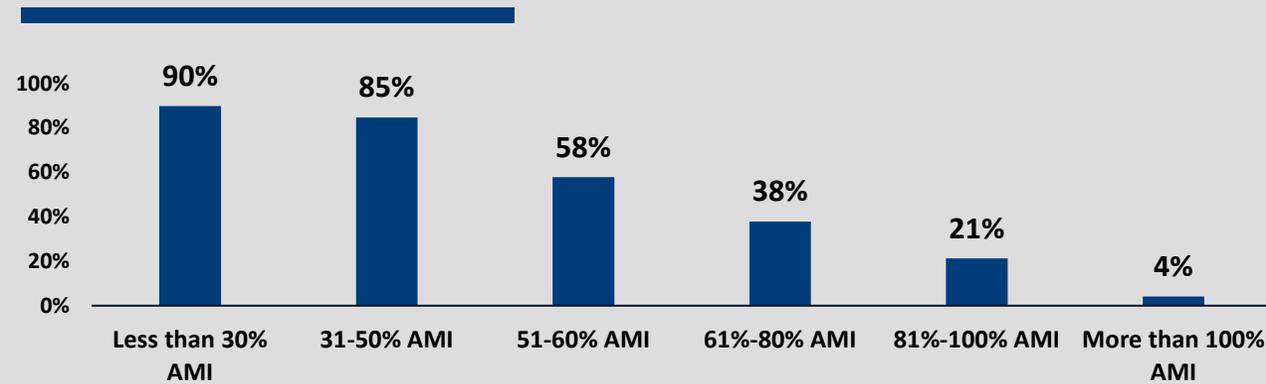
Cost burden figures are higher than the rental supply gap. This is because many households choose to spend more than 30% of their income on housing to access high quality schools, safer conditions, proximity to employment centers, or amenities which are often unavailable near lower priced units.

“The rent eats first.” For low-income households, spending a disproportionate amount of income on housing is often called **shelter poverty**.

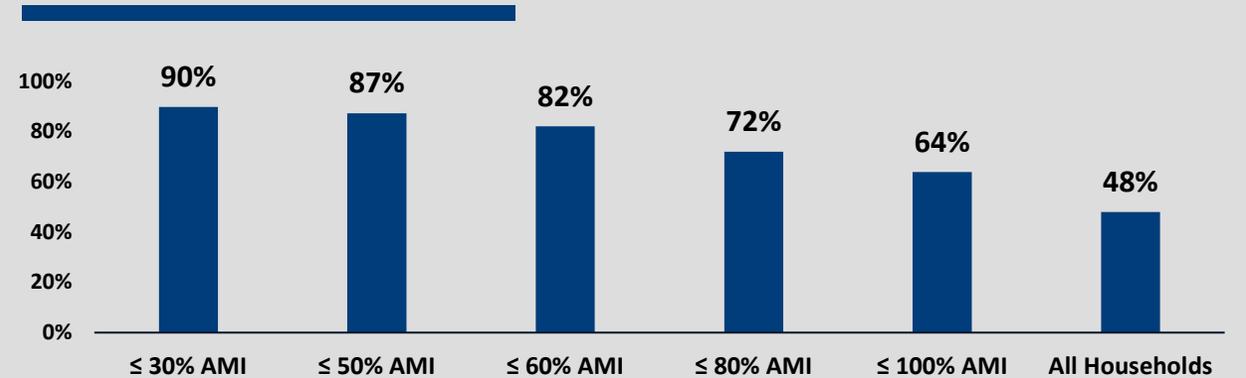
After paying for housing costs, many households do not have enough to adequately cover other necessary expenses like transportation, food, and healthcare.

**Almost 1 in 2 renters (48%) across the city are housing cost burdened.**

Share of Cost Burdened Renter Households by AMI Band (2021)



Cumulative Share of Cost Burdened Renter Households by AMI Band (2021)



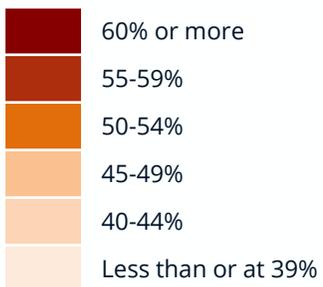
## CURRENT HOUSING NEEDS | COST BURDEN

Vulnerable renter populations across the city often face increased cost burden—almost three in four single parent renters with children living in the city are cost burdened.

Some population cohorts are much more impacted by housing cost burden than the overall population.

In Dallas, single-parents with children face a disproportionate burden, as they often need larger units than can be supported on a single income. Senior renters—especially those on a fixed income (above the age of 65+), are more likely to be cost burdened.

Black renters, particularly those in the City of Dallas, are cost-burdened at a higher rate than non-Hispanic White and Hispanic/Latino renters.



### Cost Burdened Renters (2021)

Cost Burden %	City of Dallas	Dallas County	DFW
All Renters	48%	48%	46%
Senior Renters	55%	57%	58%
Renter Households with Children	54%	52%	48%
Renter Single Parents with Children	74%	74%	71%
Black Renters	55%	53%	53%
Non-Hispanic White Renters	38%	38%	41%
Hispanic/Latino Renters	47%	48%	47%
Renters 35 and below	45%	44%	45%

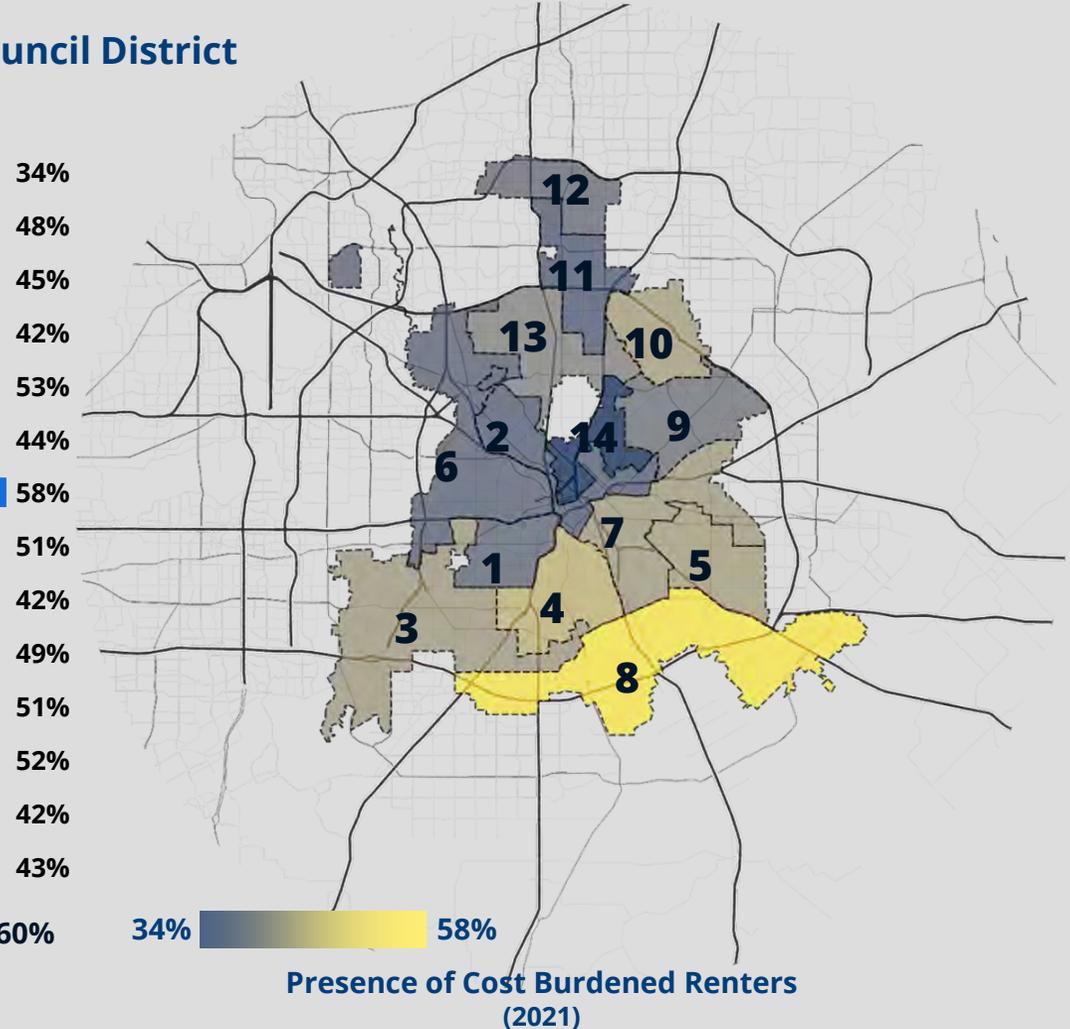
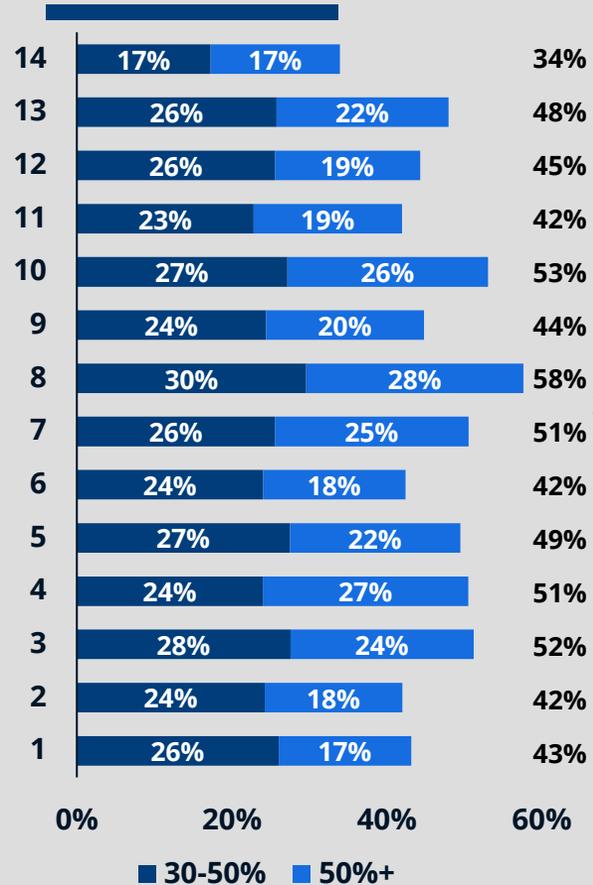
**Source(s):** PUMS 2021, ACS 2021 5-year estimates, Variables: HINCP, ADJINC, NP, GRNTP, RAC1P, TEN, CHLD, HR&A Calculations.

## CURRENT HOUSING NEEDS | COST BURDEN

Cost burden rates largely follow income and poverty trends—as more southern council districts face higher rates of cost burden.

Mirroring median income and poverty trends, the southern portion of Dallas faces the highest rates of cost burden. In District 8, three in ten renters are severely cost-burdened, which means they spend more than 50% of their gross income on housing costs—leaving very little for transportation, food, and other needs.

### Renter Cost Burden by Council District (2021)



**Cost burdened** households dedicate 30-50% of their income to housing costs.  
**Severely cost burdened** households dedicate more than 50% of their income to housing costs.

Source(s): ACS 2021 5-Year Estimates, B25074: Household Income by Gross Rent as a Percentage of Household Income.

## CURRENT HOUSING NEEDS | MEAN RENTS

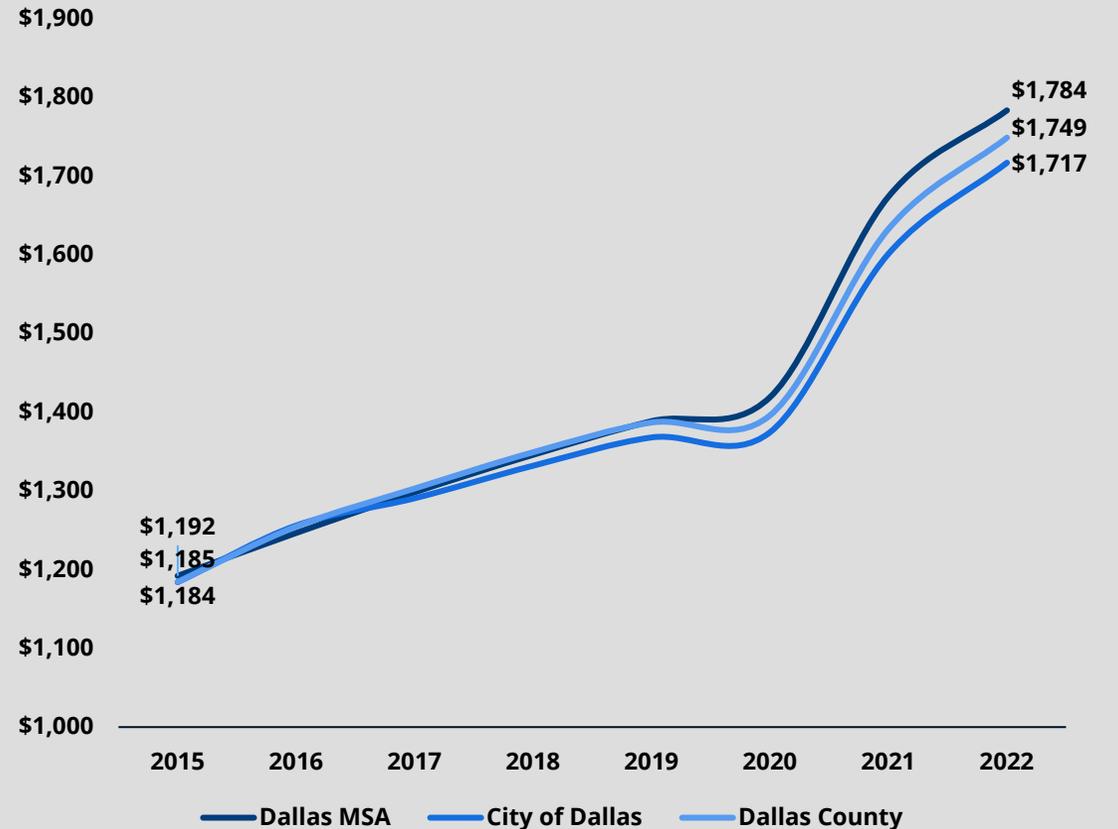
Mean rents in the City of Dallas have increased by 60% since 2015, with a 33% increase since January 2020.

Like other housing markets across the country, the rate of rent increases spiked drastically following the Covid-19 pandemic. Mean rents have increased almost \$500 since January of 2020.

In 2011, using the 30% affordability benchmark, households in Dallas needed to make about \$57,000 for the average rental unit to be affordable in Dallas. In 2023, a household needs **more than \$75,000**.

Across the city, the lowest rents are in southern and western parts of Dallas, with downtown-adjacent rents the highest across the city.

### Zillow Observed Rent Index (2015-2022)



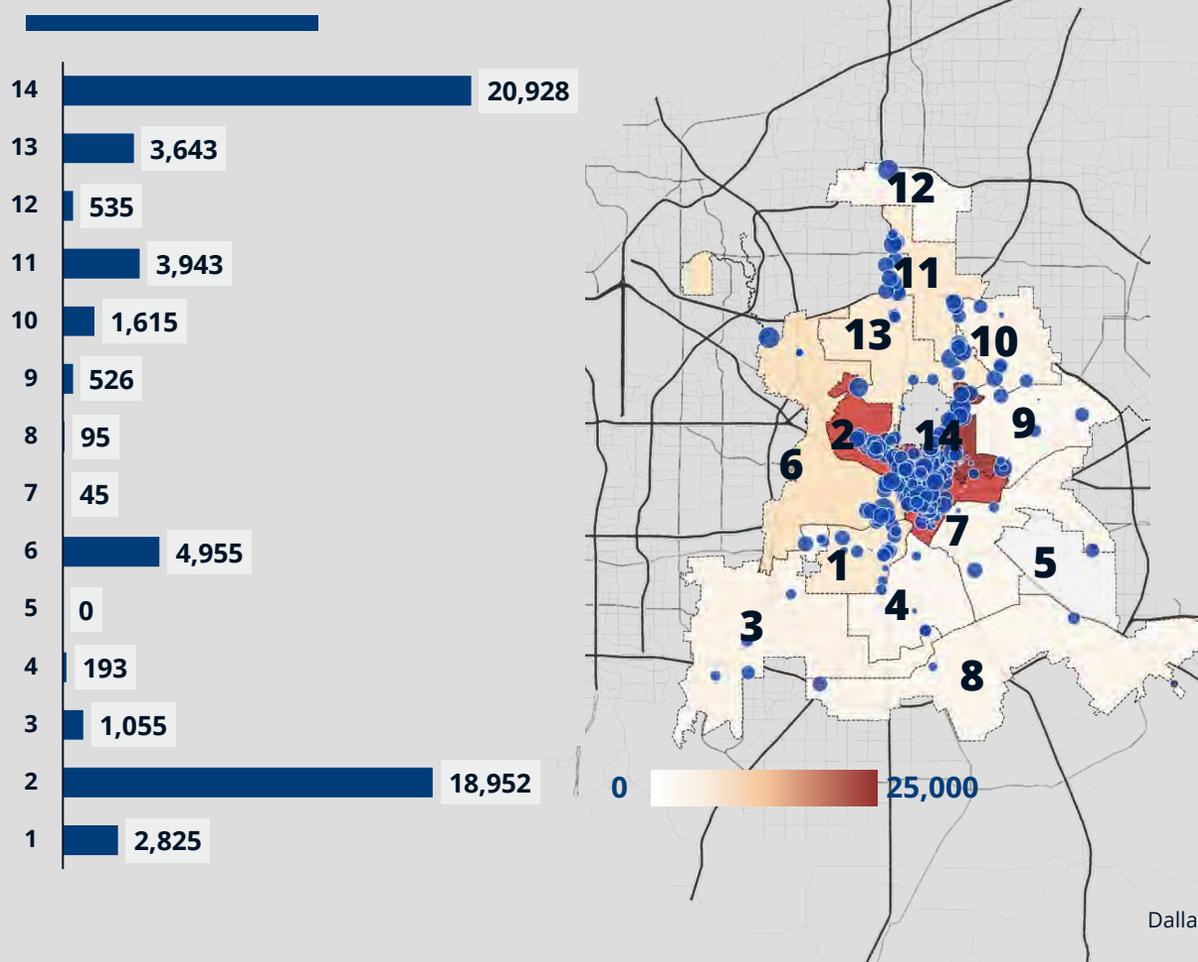
## CURRENT HOUSING NEEDS | NEW HOUSING PRODUCTION

Most new housing production has been concentrated in central Dallas with some corridors of development in North Dallas along I-75 and the Dallas North Tollway.

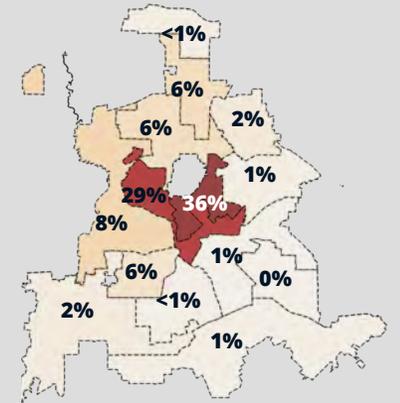
Central Districts 2 and 14 account for 65% of the multifamily units delivered since 2010.

Development in the southern Dallas districts 3, 4, 7, 5, and 8 account for **less than 3% of total development** across the city.

### New Market Rate Multifamily Units Delivered (By Council Member District, 2010-2022)



### Share of New Market Rate Deliveries (2010-2022)



**Note:** Multifamily CoStar data is only inclusive of properties with 5 or more units.

**Source(s):** CoStar.

## CURRENT HOUSING NEEDS | AFFORDABLE DELIVERIES

Dallas has added **6,600 new deed-restricted affordable units to the housing stock since 2010**, with a total deed-restricted affordable housing stock of about **30,000 units**.

Deed-restricted units are designed to remain affordable for a specified period of time based on legal restrictions that require owners to keep rents affordable at an agreed-upon price. When legal restrictions expire, units are at-risk of losing their rental affordability as they either receive new affordability restrictions or are subject to market-rate rents.

In exchange for affordability, these units often receive an operating or construction subsidy. In Dallas, most of the units are subsidized using the low-income housing tax credit (LIHTC), which are affordable for a minimum of 30 years.

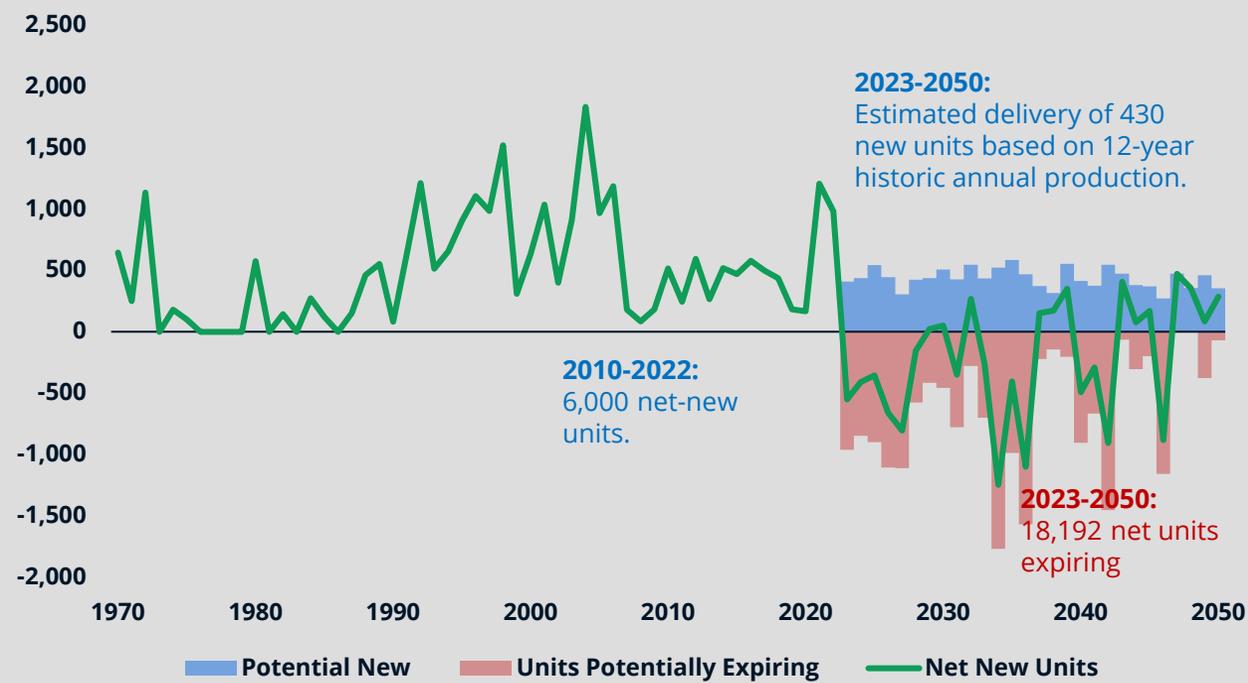
After the 30-year compliance period is over, the LIHTC restrictions expire, and the owner can choose to either continue to operate the property as affordable housing or convert it to market-rate housing. **Between 2023 and 2050, there are 18,192 units that are at risk of expiring affordability restrictions, of which more than 60% are owned by for-profit entities, which are at a higher risk of losing affordability.**

However, many LIHTC properties choose to continue to operate as affordable housing beyond the initial 30-year period through various means such as refinancing and re-syndicating the property.

**Note:** Deed-restricted units include units subsidized by federal loan, insurance, and voucher programs, and by state Low Income Housing Tax Credit and Section 236 programs. Subsidies issued by Texas Public Facility Corporation (PFC) communities are not captured in NHPD data unless they also have federal subsidies. PFC communities are inventoried by CoStar as 'market/affordable', which are included in 'market-rate', if the only subsidies are issued by the PFC. The full list of properties are provided in the appendix.

**Source(s):** NHPD. Potential New based on 20<sup>th</sup>-80<sup>th</sup> percentile average of development from 2012-2022. Units potentially expiring reflects last known covenant on property.

### City of Dallas Deed-Restricted Affordable Units: Potential Deliveries and Expiration (1970-2050)



## CURRENT HOUSING NEEDS | AFFORDABLE HOUSING UNITS

Dallas' deed-restricted affordable units are mostly concentrated outside areas of high economic mobility and opportunity.

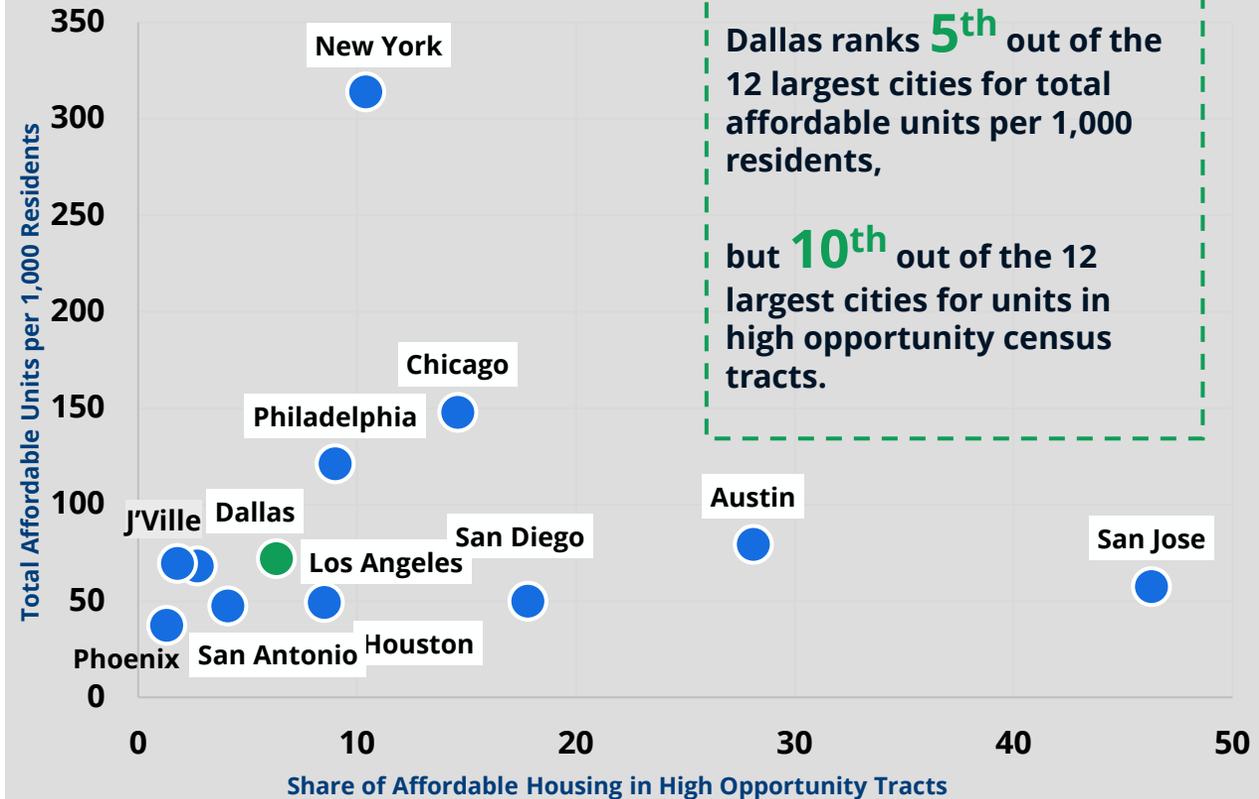
The City of Dallas ranks 5<sup>th</sup> out of the 12 largest cities in America for total affordable units per 1,000 residents, providing an important resource for low-income residents.

However, when considering **access to opportunity**, the city falls behind. **Less than 10% of the city's deed-restricted affordable housing stock are in high opportunity neighborhoods** (here defined as census tracts that are at or above the city's median income of \$58,200).

Access to high-income neighborhoods in Dallas is important because it can have a significant impact on a family's quality of life and future opportunities. When individuals have access to affordable housing in safe and stable neighborhoods with good schools, employment opportunities, and community resources, they are more likely to thrive and succeed.

### Affordable Units by Access to Opportunity

Top 10 Cities (2021)

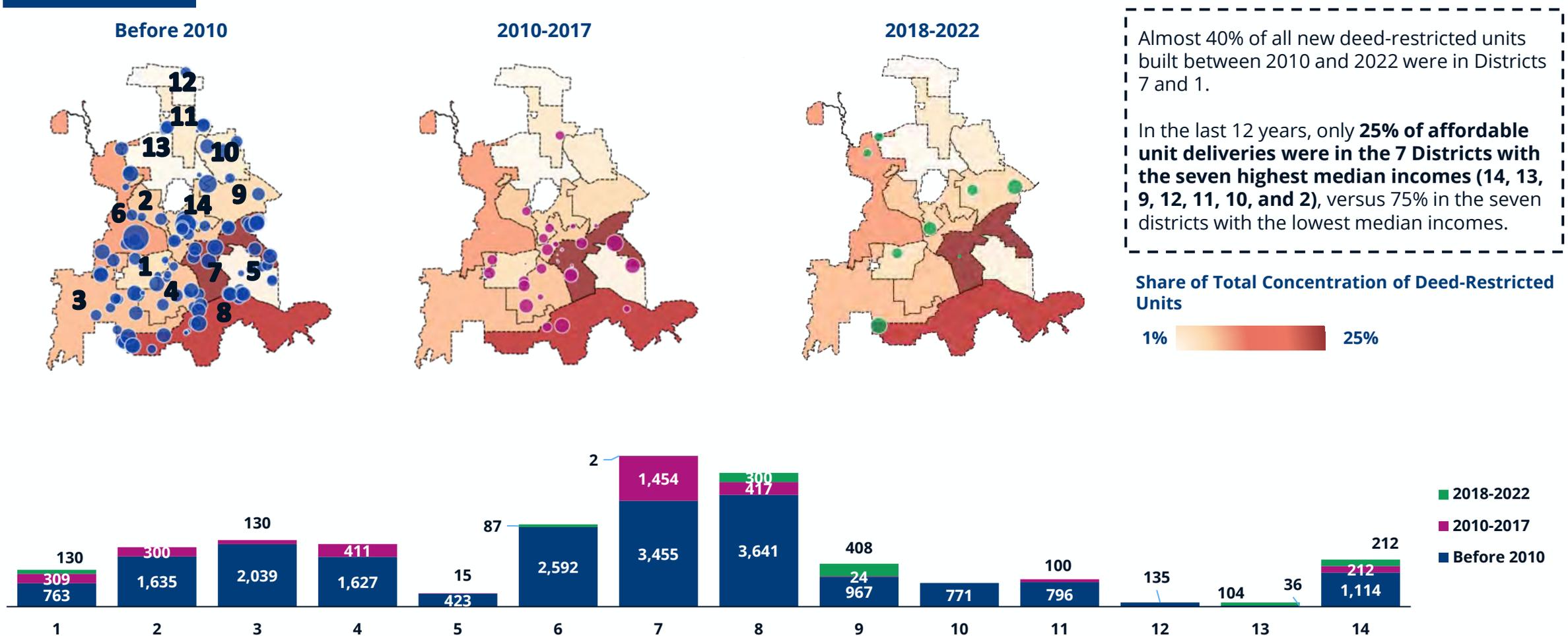


**Source(s):** NHPD Data, ACS 2021 5-year; High Opportunity Tracts defined as tracts that have a median income higher than the median income of the city overall.

## CURRENT HOUSING NEEDS | AFFORDABLE DELIVERIES

Deed-Restricted affordable construction since 2010 has been concentrated in southern and central Dallas, with more than 1,400 new units in District 7.

### Deed-Restricted Inventory by Year Built / Preservation



Source(s): NHPD. Excludes inconclusive units.

## CURRENT HOUSING NEEDS | RENT TRENDS

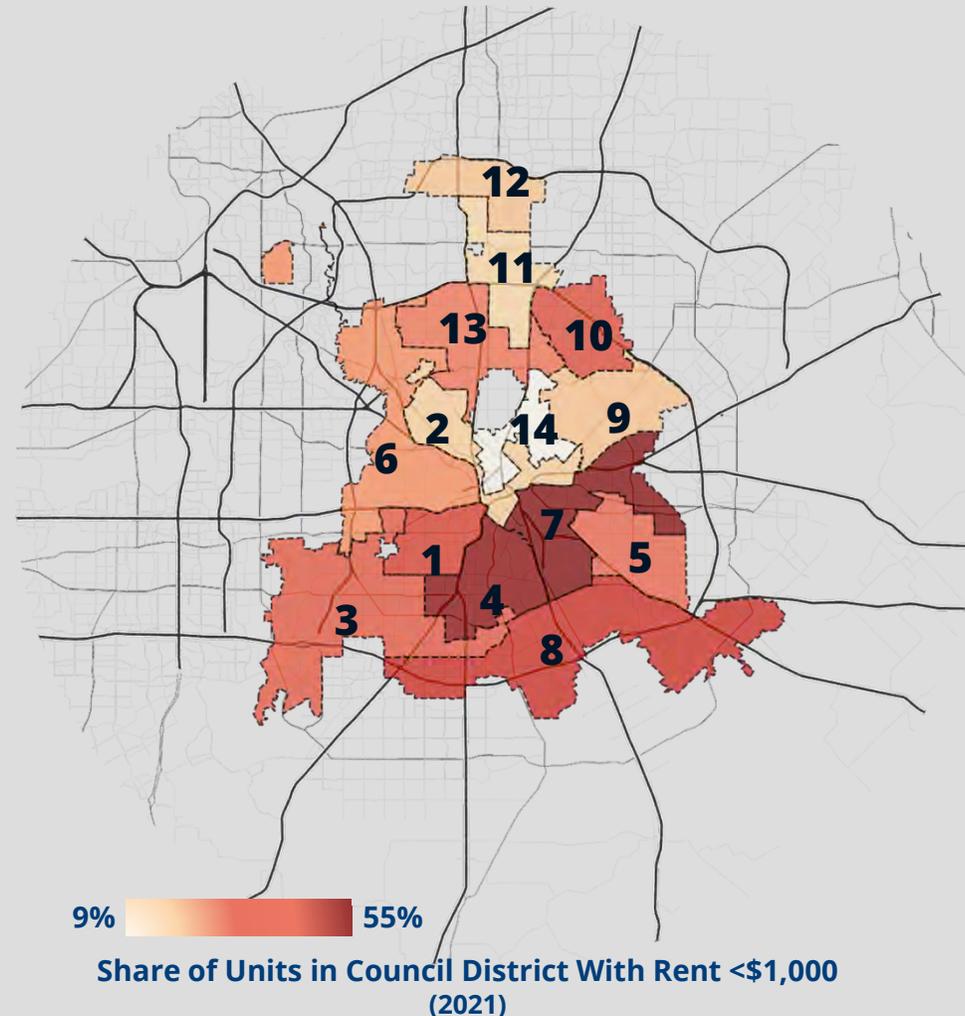
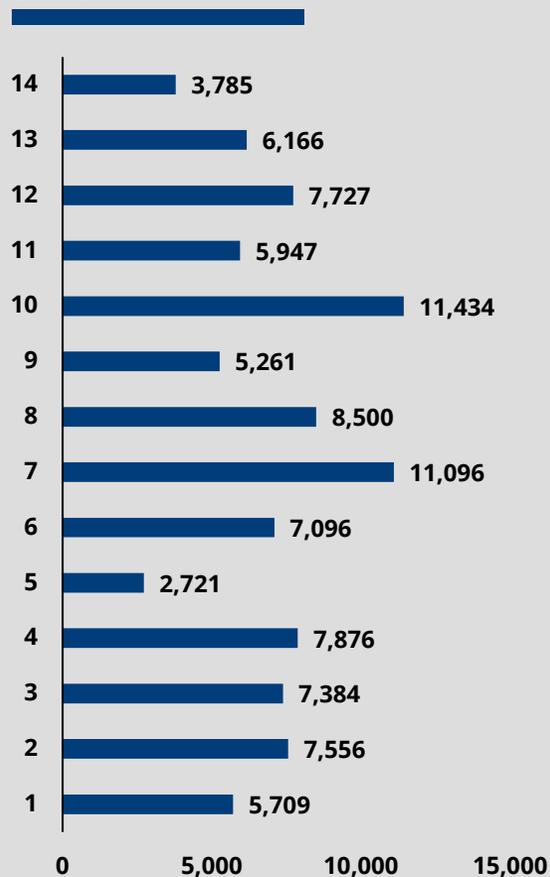
Considering all units that are available for rent under \$1,000 (deed-restricted units and unrestricted affordable units), there are significant concentrations in District 10 and 13 as well as across southern Dallas.

Unrestricted affordable units or NOAH units (Naturally Occurring Affordable Housing) are terms used to describe existing affordable rental housing that is not subsidized by government programs such as the Low-Income Housing Tax Credit (LIHTC) or public housing. NOAH properties are typically owned by private landlords or small-scale property owners who rent out units at below-market rates.

NOAH properties can provide a critical source of affordable housing for low-income households, especially in high-cost areas where subsidized housing is limited.

Because NOAH properties are not subsidized by government programs, they are vulnerable to market pressures such as rising property values and rents, which can lead to the loss of affordable housing units.

### Units with Rent Under \$1,000 (2021)



**Note:** Units with rent under \$1,000 includes both deed-restricted and market-rate units.

**Source(s):** ACS 2021 5-Year Estimates, B25068: Bedrooms by Gross Rent.



05

# City of Dallas Supply Deep Dive

## CURRENT HOUSING NEEDS | THE HOUSING LANDSCAPE

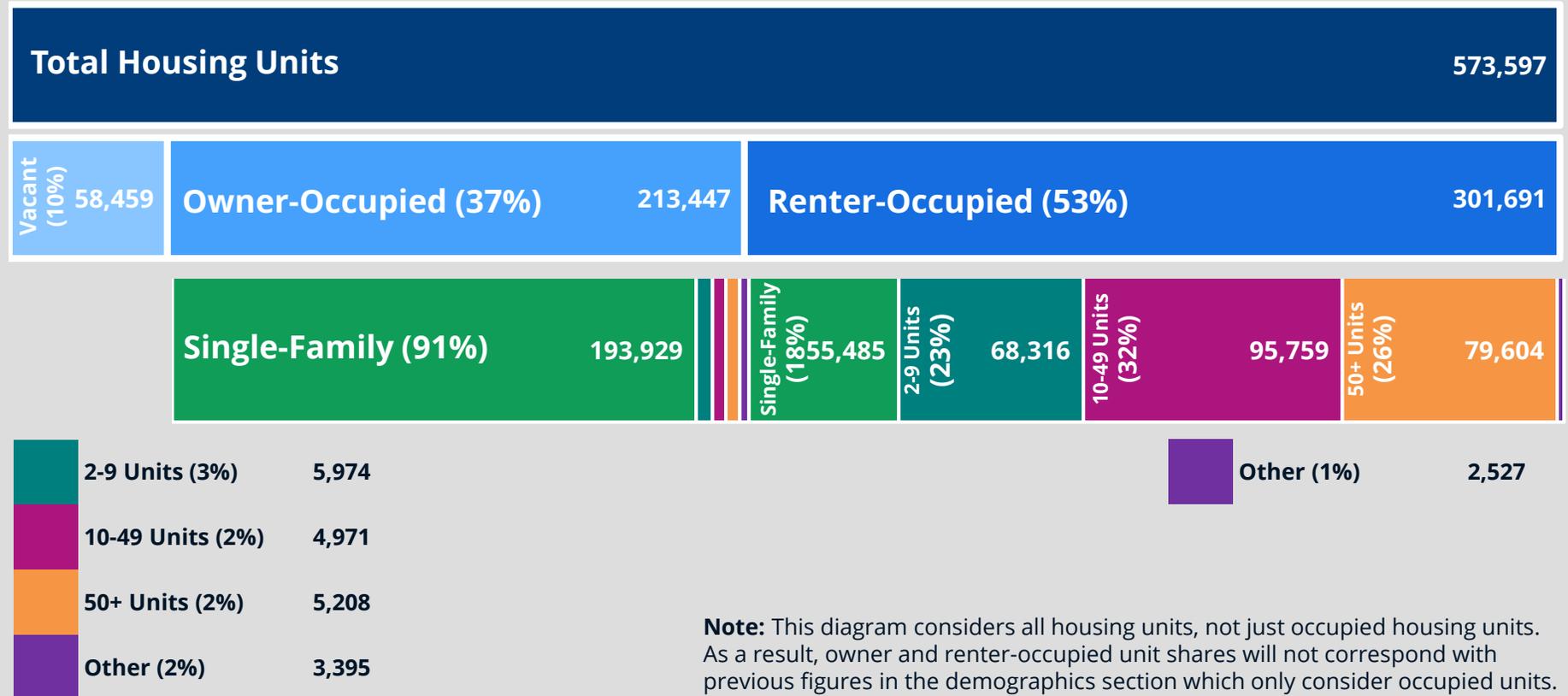
Approximately 10% of Dallas' housing stock is vacant and 37% is owner-occupied. The remaining 301,691 units (53%) are renter occupied.

There are a total of 573,597 occupied housing units in Dallas, with 213,447 units (37%) owner-occupied and 301,691 units (53%) renter-occupied. The remaining units are vacant. The majority of owner-occupied units are single-family homes, which represent 91% of all owner-occupied units in the city.

In contrast, the renter-occupied market is more diversified in terms of typology. Single-family homes represent only 18% of all renter-occupied units, with multi-unit structures comprising the majority of the rental market. Specifically, 50+ unit structures represent the largest segment of the renter-occupied market with 79,604 units (26%), followed by 10-49 unit structures with 95,759 units (32%) and 2-9 unit structures with 68,316 units (23%).

**Source(s):** ACS 2021 5-Year Estimates, B25024: Units in Structure, B25032: Tenure by Units in Structure.

### City of Dallas Housing Landscape Diagram (2021)



**Note:** This diagram considers all housing units, not just occupied housing units. As a result, owner and renter-occupied unit shares will not correspond with previous figures in the demographics section which only consider occupied units.

## CURRENT HOUSING NEEDS | THE HOUSING LANDSCAPE

Approximately 10% of Dallas’ housing stock is vacant—in line with national and statewide figures for similar cities.

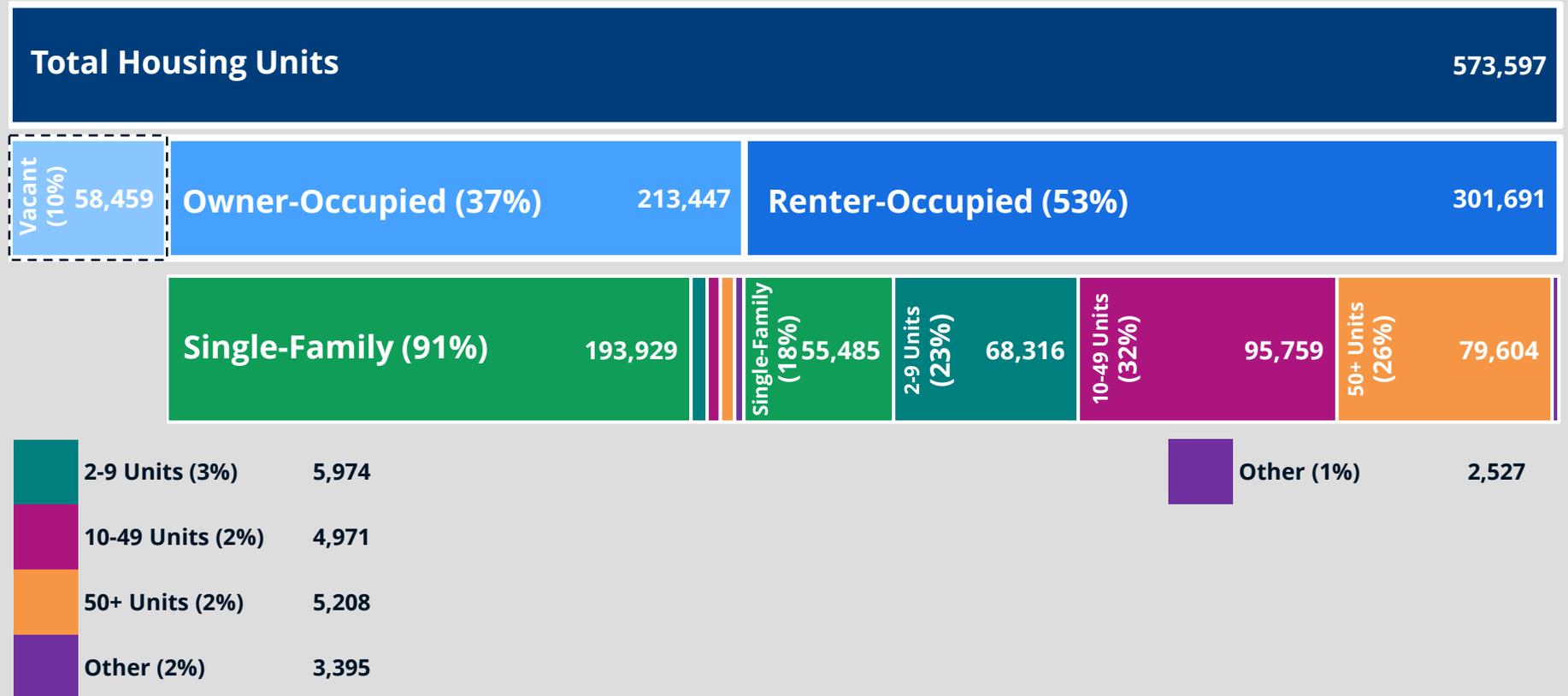
### Vacant Units

Of the 58,459 vacant units, 30,451 were vacant and available for rent, which represents the majority of the vacant units at 52.1%. Another 3,946 units were vacant and rented, but not yet occupied. 3,812 units were vacant and available for sale, while 1,872 units had been sold but were not yet occupied.

There were also 2,820 units that were classified as vacant for seasonal, recreational, or occasional use, while 18 units were classified as vacant for migrant workers. The remaining 15,540 units were classified as "other vacant," which could include units that are not currently available for rent or sale, such as those undergoing renovations or held for other reasons.

**Source(s):** ACS 2021 5-Year Estimates, B25024: Units in Structure, B25032: Tenure by Units in Structure.

### City of Dallas Housing Landscape Diagram (2021)



## CURRENT HOUSING NEEDS | SUPPLY BY AFFORDABILITY

Of all renter-occupied housing units, 90% are market-rate units, with no affordability covenant or requirement, while about 30,350 are deed-restricted—affordable through a public subsidy and covenant.

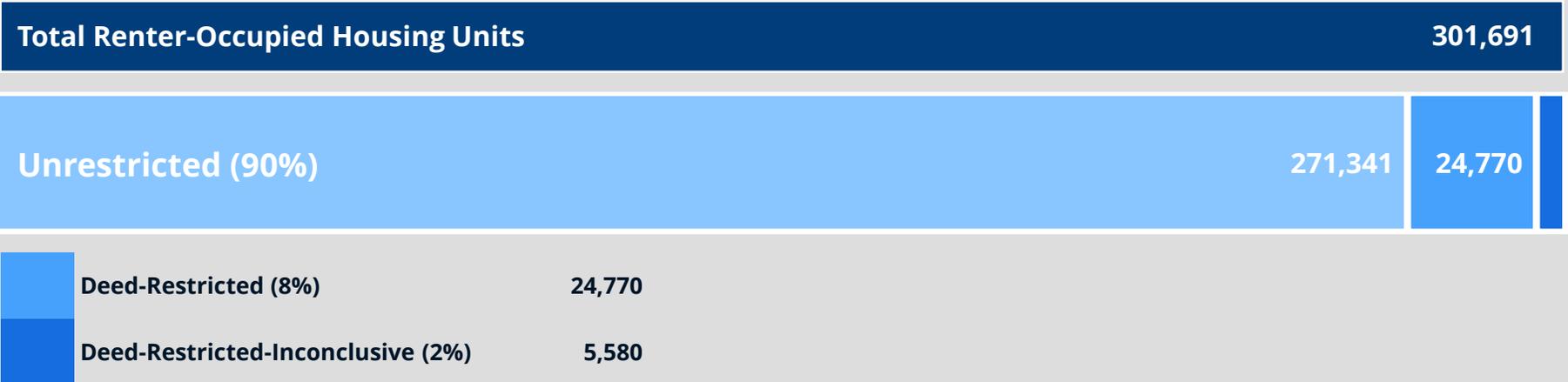
271,341 units (90%) in Dallas are classified as unrestricted and 24,770 units (8%) can be classified as deed-restricted and active.

In addition, there are 5,580 rental units (2%) that are classified as deed-restricted but inconclusive.

This means that it is unclear from the National Housing Preservation Database (NHPD) whether these units are currently subject to any deed restrictions or if the restrictions have expired.

While 10% deed-restricted may seem like a small share of the total housing stock, this is in line with comparable cities. Dallas ranks 5<sup>th</sup> of 12 in the country for affordable units per capita (for metros larger than 1 million residents).

### Renter-Occupied Units by Affordability (2021)



**Source(s):** ACS 2021 5-Year Estimates, B25024: Units in Structure, B25032. Tenure by Units in Structure; National Housing Preservation Database (NHPD), 2022.

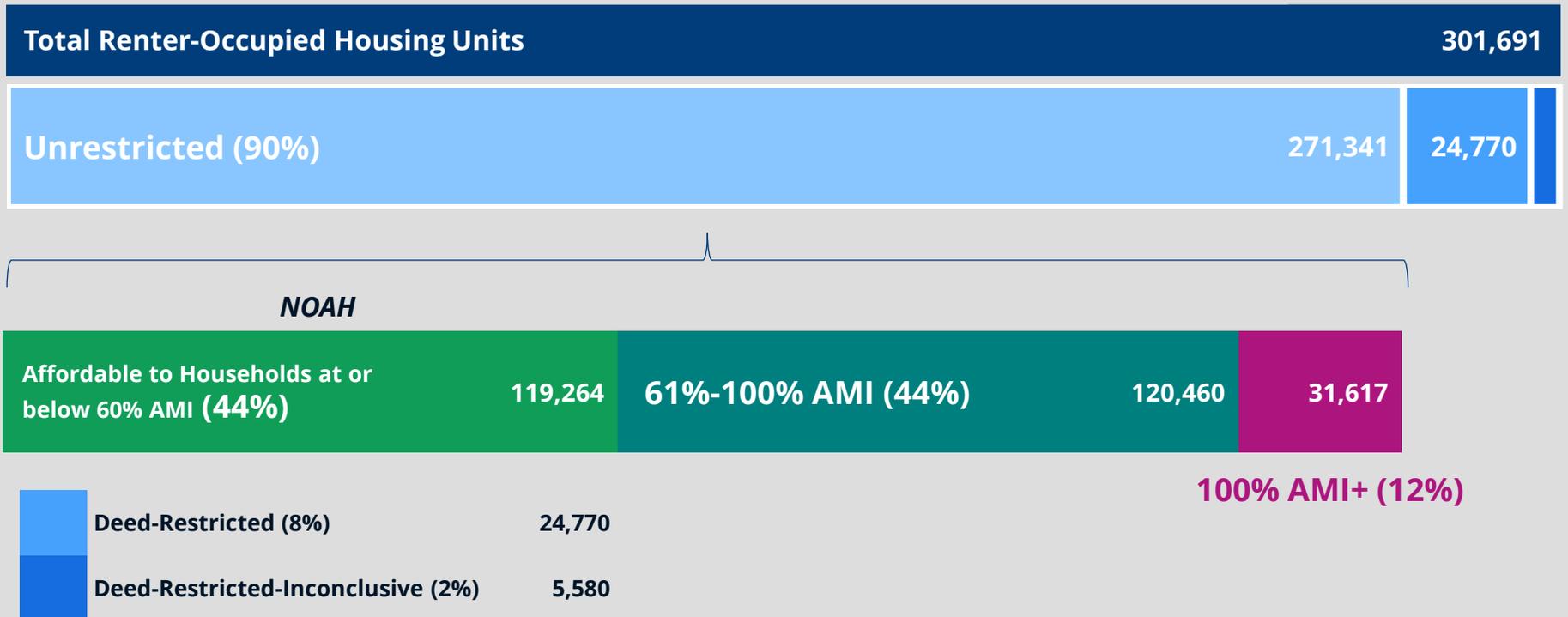
**Note:** Deed-restricted units include units subsidized by federal loan, insurance, and voucher programs, and by state Low Income Housing Tax Credit and Section 236 programs. Subsidies issued by Texas Public Facility Corporation (PFC) communities are not captured in NHPD data unless they also have federal subsidies. PFC communities are inventoried by CoStar as 'market/affordable', which is included in 'market-rate', if the only subsidies are issued by the PFC. The full list of properties is provided in the appendix.

## CURRENT HOUSING NEEDS | SUPPLY BY AFFORDABILITY

Of all unrestricted units in the city, 44% are affordable to residents earning at or below 60% of area median income (AMI).

119,264 units (44%) are unrestricted and affordable to households earning at or below 60% of the Area Median Income (AMI), and an additional 120,460 units (44%) are affordable to households earning between 60% and 100% of the AMI. The remaining 31,617 units (12%) are only affordable to households earning more than 100% or more of AMI.

### Renter-Occupied Units by Affordability (2021)



**Source(s):** ACS 2021 5-year estimates, B25032: Tenure by Units in Structure, National Housing Preservation Database, 2022, PUMS 2021, Variables: WGTP, GRNTP, BLD, Tenure, Rent AMI CATS.

**Note:** Deed-restricted units include units subsidized by federal loan, insurance, and voucher programs, and by state Low Income Housing Tax Credit and Section 236 programs. Subsidies issued by Texas Public Facility Corporation (PFC) communities are not captured in NHPD data unless they also have federal subsidies. PFC communities are inventoried by CoStar as 'market/affordable', which is included in 'market-rate', if the only subsidies are issued by the PFC. The full list of properties is provided in the appendix.

## CURRENT HOUSING NEEDS | THE HOUSING LANDSCAPE

Rental housing properties in Dallas are categorized by typology—by number of units and year built—to determine how properties depreciate and rent levels change over time.

# Units	Before 1960	1960-1979	1980-1999	2000-2009	After 2010
1-4					
5-49					
50+					

## CURRENT HOUSING NEEDS | NOAH SUPPLY

NOAH units have a wide diversity of typologies—but are concentrated in small multifamily buildings (2-49 units).

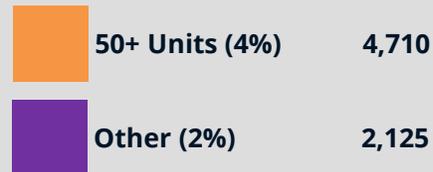
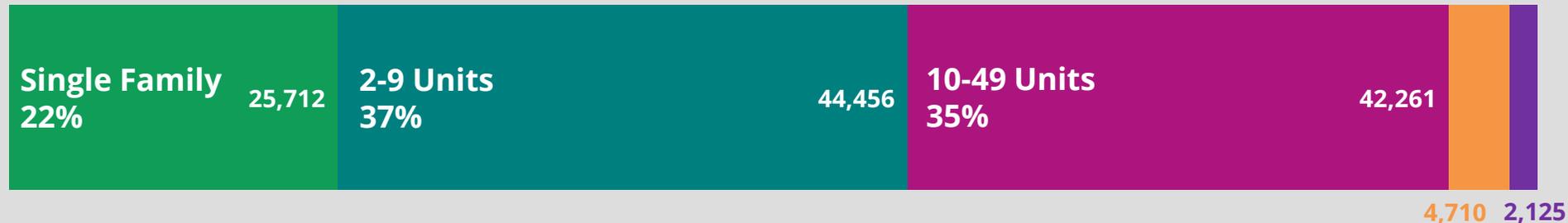
Most NOAH units are found in smaller-scale, multi-unit structures: 44,456 units (37%) are in structures of 2-9 units, and 42,261 (35%) are in structures of 10-49 units.

In addition, there are 25,712 NOAH units (22%) in single-family homes, highlighting the importance of this typology in the NOAH market. There are also 4,710 NOAH units (4%) in structures with 50 or more units and 2,125 NOAH units (2%) in mobile homes.

### All Naturally Occurring Units Affordable (≤60% AMI) (2021)

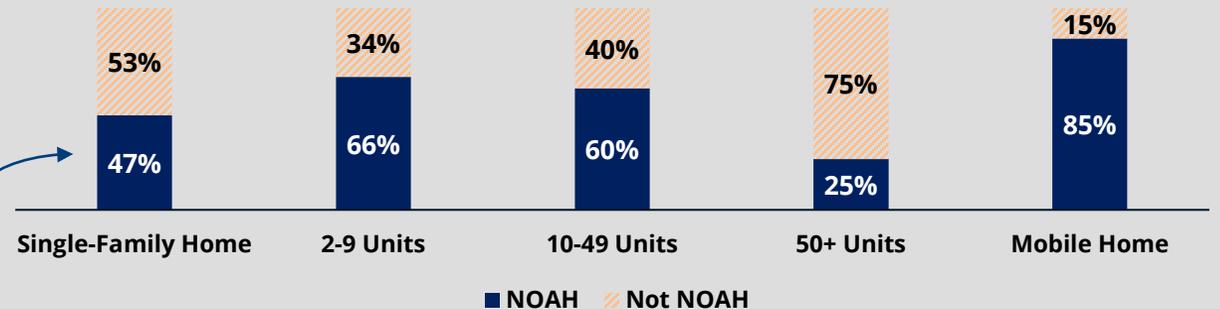
Total Units ≤60% AMI

119,264



### Unrestricted Rental Units by NOAH Status (2021)

47% of single-family rental homes charge rent affordable to households earning ≤60% AMI, while 53% are not.



**Source(s):** ACS 2021 5-year estimates, B25024: Units in Structure; B25032: Tenure by Units in Structure, B25068: Bedrooms by Gross Rent, National Housing Preservation Database, 2022, PUMS 2021, Variables: WGTP, GRNTP, Tenure, BLD, NOAH.

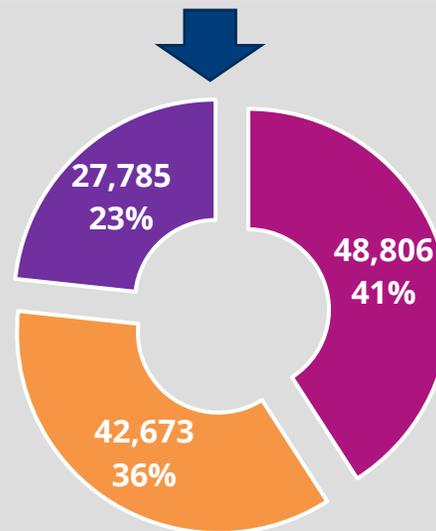
## CURRENT HOUSING NEEDS | NOAH SUPPLY

Across both NOAH and deed-restricted units, the plurality of affordable units are studios and one-bedrooms, with limited 3-bedroom availability for families with children.

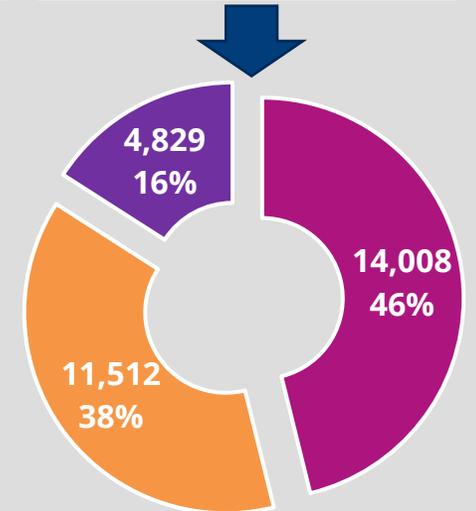
Only one in five units affordable under 60% of AMI across the city are deed-restricted. The remaining units are NOAH, subject to losing their affordable status if rent increases persist.

Across both NOAH and deed-restricted units, most units are studios and one-bedrooms. There is limited 3-bedroom availability for families with children—only 23% of NOAH units are three bedrooms or larger.

### All Affordable Units (2021)



**85%**  
of affordable 3-bedroom+ units are unrestricted NOAH units.



**Note:** Deed-restricted units include units subsidized by federal loan, insurance, and voucher programs, and by state Low Income Housing Tax Credit and Section 236 programs. Subsidies issued by Texas Public Facility Corporation (PFC) communities are not captured in NHPD data unless they also have federal subsidies. PFC communities are inventoried by CoStar as 'market/affordable', which is included in 'market-rate', if the only subsidies are issued by the PFC. The full list of properties is provided in the appendix.

**Source(s):** ACS 2021 5-year estimates, B25032: Tenure by Units in Structure, B25068: Bedrooms by Gross Rent, National Housing Preservation Database, 2022

## CURRENT HOUSING NEEDS | FINDING A HOUSING GAP

Finding a housing gap for the City of Dallas requires a deep dive into rental housing demand and supply.

The current housing supply gap measures the difference between what people can afford to pay in rent (demand) and the housing options available to them at that price point (supply).

For housing to be affordable, we assume that housing should cost no more than 30% of total monthly pre-tax household income—the Department of Housing and Urban Development’s standard for household affordability.

The **demand calculation** examines the maximum amount of affordable rent each household can pay at each income level.

The **supply calculation** evaluates how many units are available at current levels of monthly rent.

**The difference between the demand and supply is the rental housing gap (housing gap).** Housing gaps are summed cumulatively at varying income thresholds, because a household earning a higher income can afford any unit at or below their 30% threshold.

Many households pay less than 30% of gross income for housing, especially if there is a supply of low-cost rental units.

When there is an insufficient supply of quality housing that is affordable for one income group, many households in that group pay more than they can afford, creating competition with the income band above them.

**Note:** The current gap analysis considers all occupied renter households in the city—not those who would move if there was housing available—therefore showing no existing gap.

**Source(s):** JCHS, Metropolitan Area Planning Council (MAPC), Beacon Economics.

### Housing Gap Example



There are **39,400 households** in the City of Dallas making less than \$30,000.



Housing costs must be **less than \$750** to be affordable to these households (inclusive of utilities).



Citywide, there are **only 11,400 units with rent less than \$750**. This does not account for quality or location of housing.

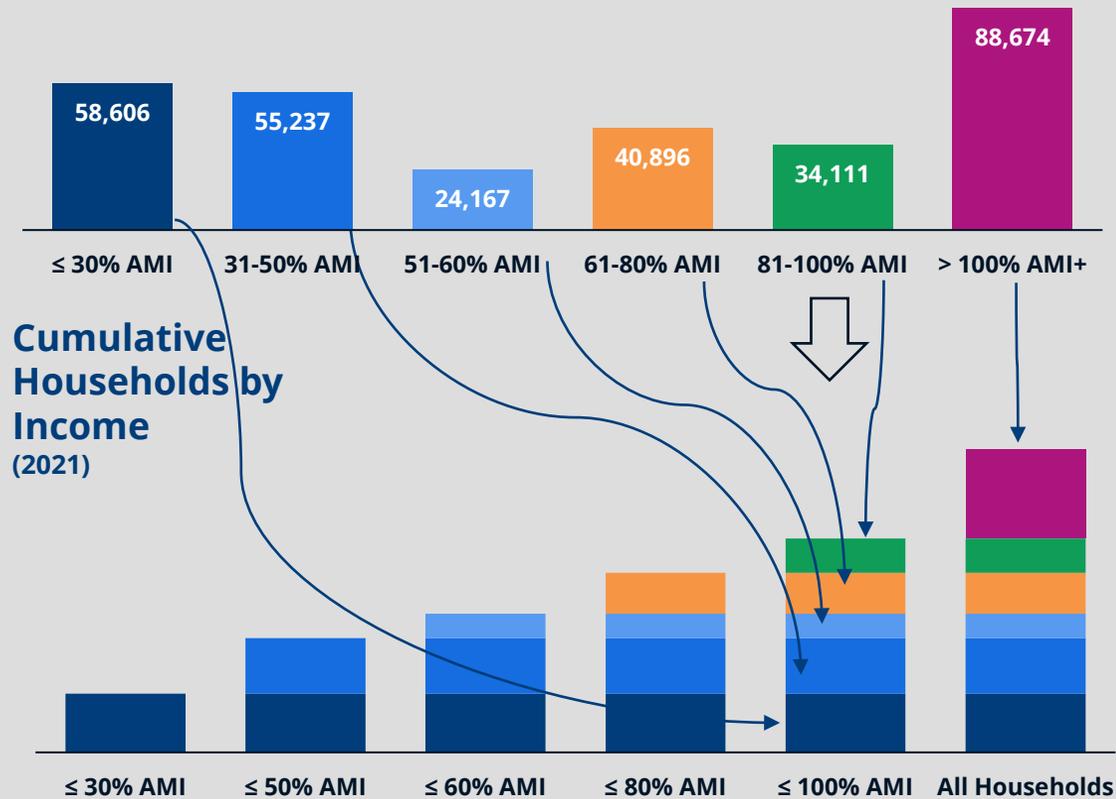


The supply gap for households making less than \$30,000 is **28,000 units**.

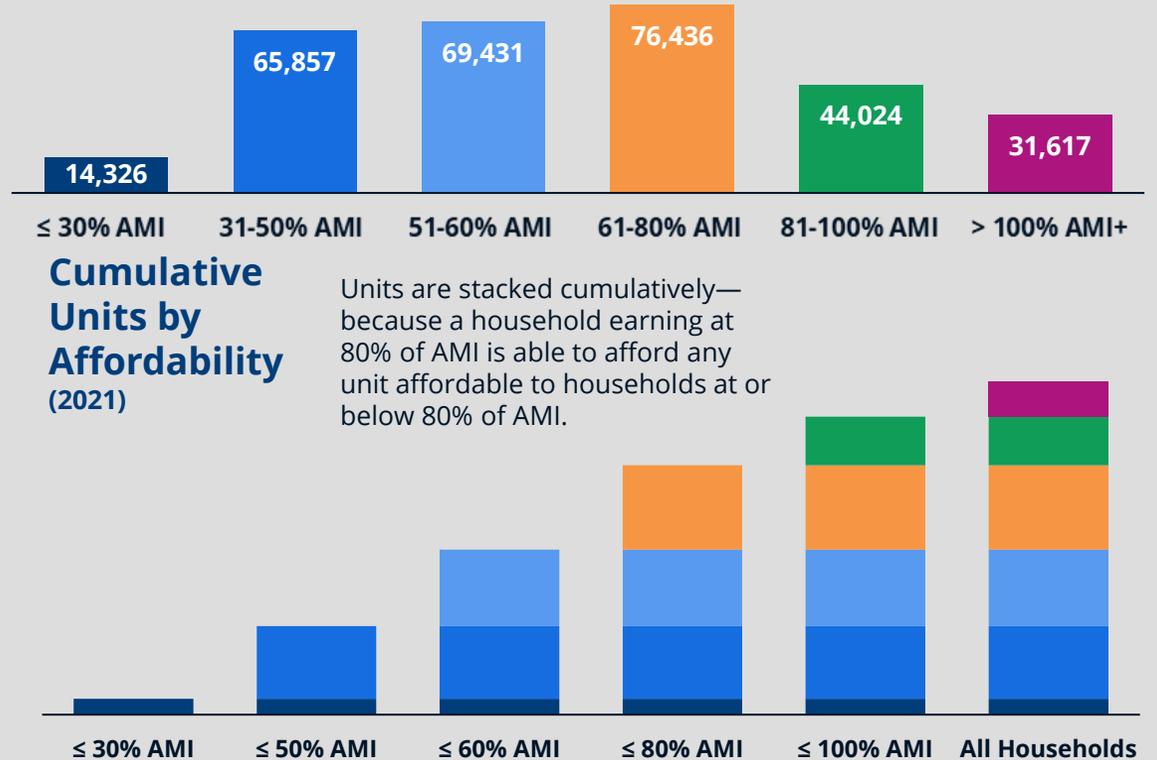
## CURRENT HOUSING NEEDS | HOUSING GAP

Arranging households by income (demand) along with units by rent affordable (supply) can help find the gap of affordable housing units across the city.

### Rental Households by Income (2021)



### Units by Affordability (2021)

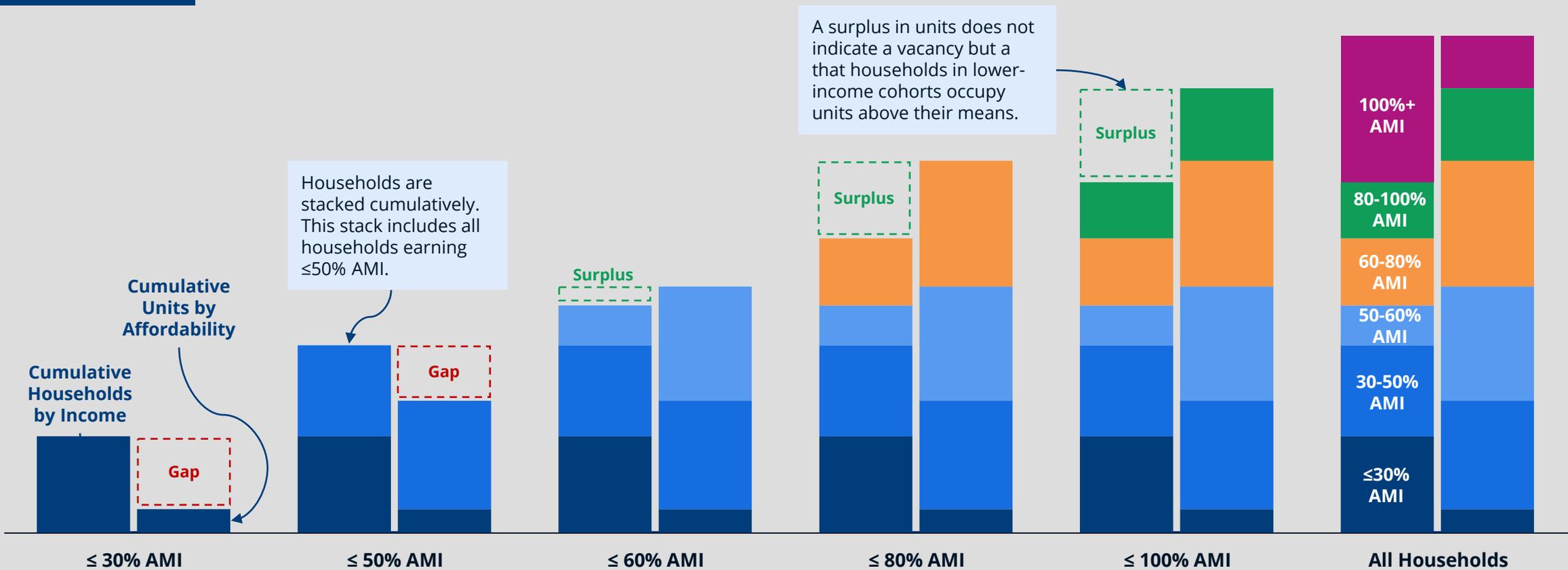


Source(s): PUMS 2021, ACS 2021 5-year estimates, Variables: WGTP, GRNTP, ADJHSG, Income AMI CATS, Tenure, HR&A Calculations.

## CURRENT HOUSING NEEDS | HOUSING GAP

Arranging households by income (demand) along with units by rent affordable (supply) can help find the gap of affordable housing units across the city.

### Rental Households and Units Affordable by Income (2021)



Source(s): PUMS 2021, ACS 2021 5-year estimates, Variables: WGTP, GRNTP, ADJHSG, Income AMI CATS, Tenure, HR&A Calculations.

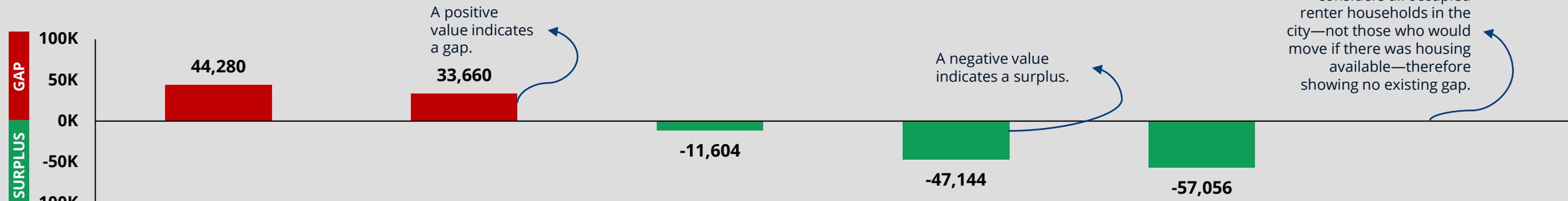
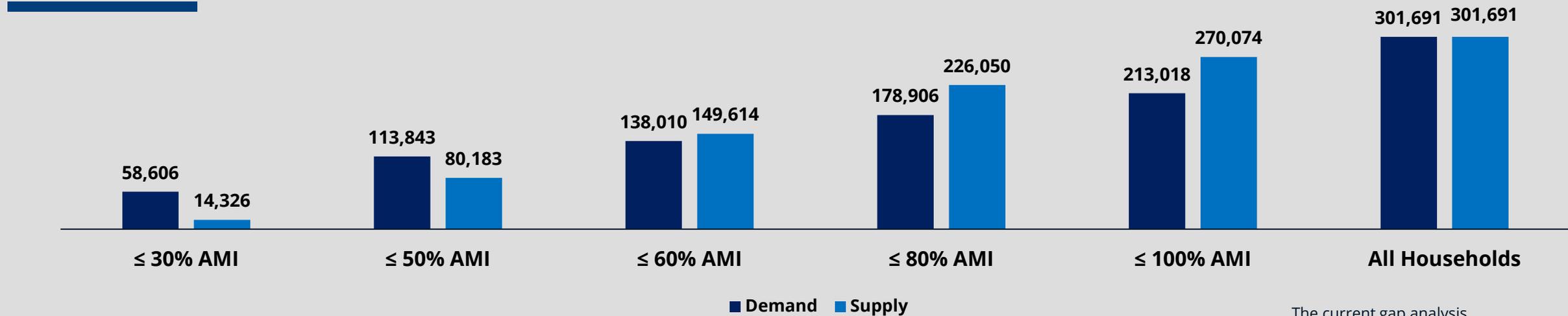
Note: Higher-income cohorts may elect to live in units below their means, widening each gap for lower-income cohorts.

## CURRENT HOUSING NEEDS | HOUSING GAP

There is a 33,660-unit gap in affordable units available for households earning at or below 50% of AMI. For households at or below 30% of AMI, this gap increases to 44,280 units.

### Rental Housing Supply Gap

(2021)



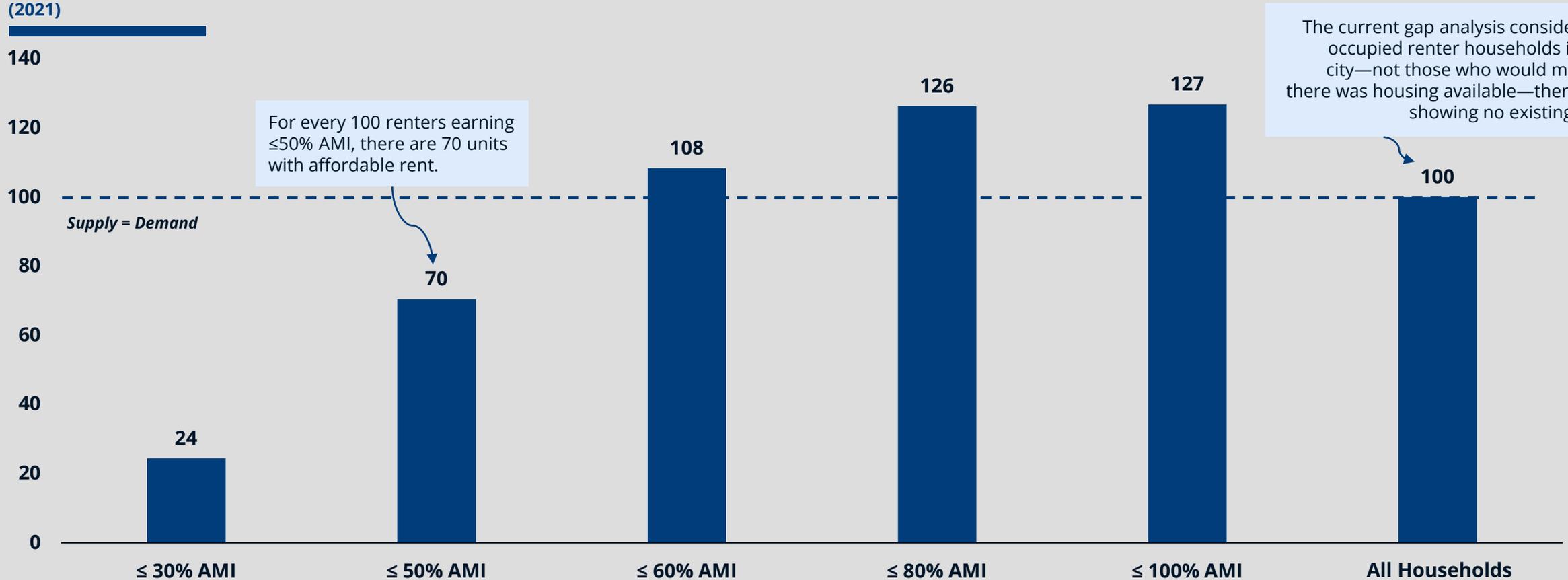
**Note:** Demand and supply bars represent the cumulative demand by income category. E.g., ≤60% AMI demand includes households earning ≤50% AMI and earning ≤30% AMI. Surpluses do not indicate vacant units, only that high income cohort rent units affordable to households below their income range.

The current gap analysis considers all occupied renter households in the city—not those who would move if there was housing available—therefore showing no existing gap.

## CURRENT HOUSING NEEDS | HOUSING GAP

There are 70 units with affordable rent for every 100 renters earning at or below 50% of AMI. For renter households earning at or below 30% of AMI, there are only 24 units available.

### Units Affordable per 100 Renter Households by Income (2021)



**Source(s):** PUMS 2021, ACS 2021 5-year estimates, Variables: WGTP, GRNTP, ADJHSG, Income AMI CATS, Tenure, HR&A Calculations.

**Note:** Higher-income cohorts may elect to live in units below their means, widening each gap for lower-income cohorts.



06

# Future Housing Needs

# Key Takeaways

- 1** According to the Texas Demographics Center (TDC) projections, the DFW will gain **1.17M households by 2030 at a growth rate of 15%**, while Dallas County and the City of Dallas will grow at 8%.
- 2** The City of Dallas is projected to add **30,120 new renter households by 2030**, with the largest increase in households earning more than 100% of AMI.
- 3** Current trends suggest that production over the next decade will be skewed towards higher income renters, with **63% of new development only affordable to households earning above 80% of AMI**.
- 4** Given our demand and supply projections, the gap is projected to increase from 33,660 units to **83,503 units for households at or below 50% of AMI**. The gap is also projected to affect **households up to 80% of AMI**.

*Note: AMI stands for Area Median Income, a measure of the median income of a specific geographic area calculated by the Department of Housing and Urban Development (HUD). In the City of Dallas for 2021, 50% AMI is \$31,150 for a 1-person household; \$35,600 for a 2-person household; and \$40,050 for a 3-person household.*

Demand and supply were projected for 2030 using findings in the current housing gap as the base case.

## Demand

*Forecast future population growth and characteristics*

- 1. Population Growth:** Examine forecasts for population growth from the state demographer.
- 2. Labor Force Participation:** Locate the projected distribution of future residents by their labor force participation and occupation.
- 3. Workers by Income:** Estimate the city's future income distribution by AMI level, based on the projected job mix across the city.

## Supply

*Forecast future supply growth and characteristics*

- 1. Future Supply:** Analyze historical construction rates, segmented by affordability to project future housing supply.
- 2. Current Supply Filtering:** Estimate the projected change in current housing supply, based on filtering.

## FUTURE HOUSING NEEDS | POPULATION GROWTH

According to TDC projections, the Dallas Metro will gain 1.17M households by 2030 at a growth rate of 15%, while Dallas County and the City of Dallas will grow at 8%.

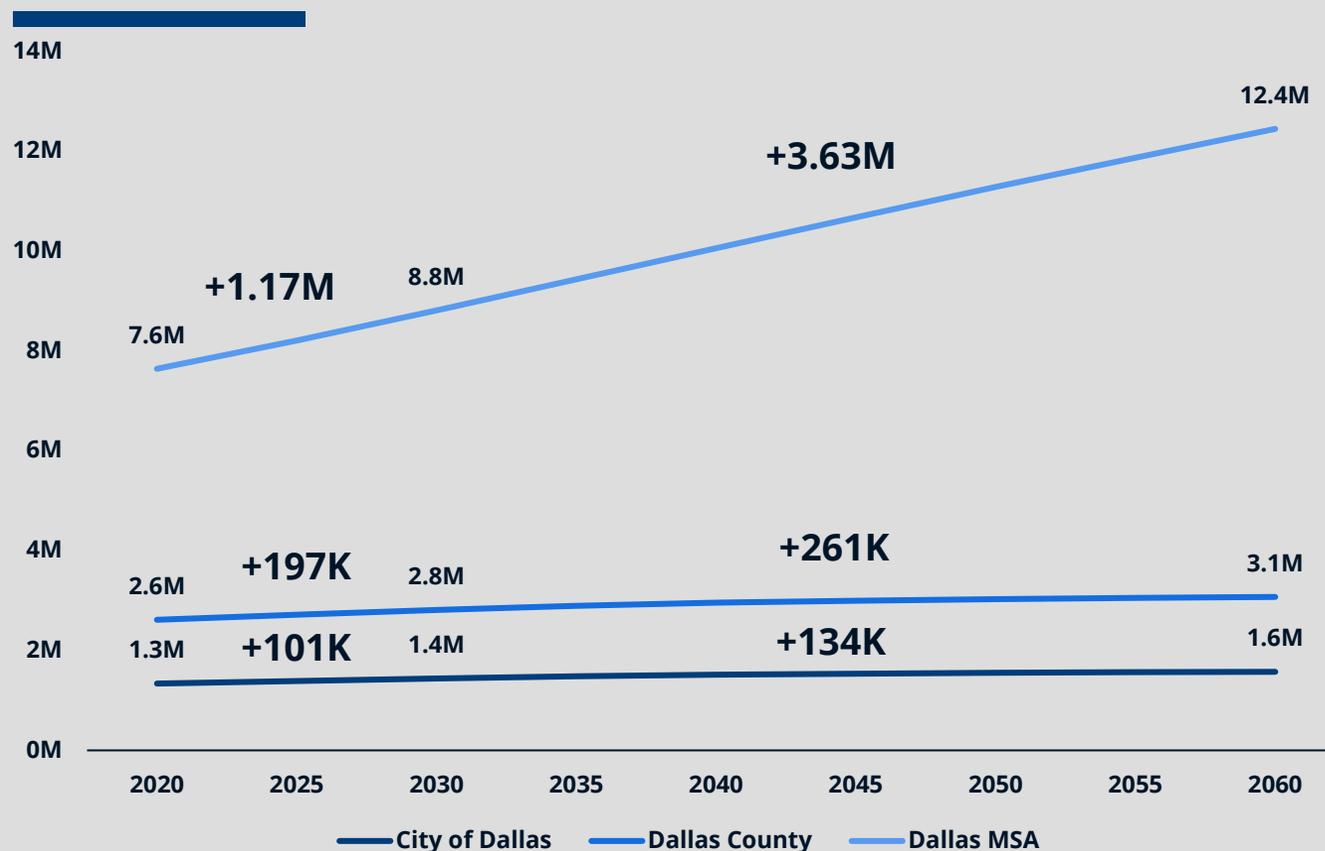
TDC estimates that the Dallas-Fort Worth Metro population growth is expected to continue outpacing population growth in Dallas County over the next ten years and through 2060.

Population projections from the TDC use the cohort component projection technique. To determine changes in the population by cohort, the current population by gender and age is projected based on historical birth, death, and net migration rates.

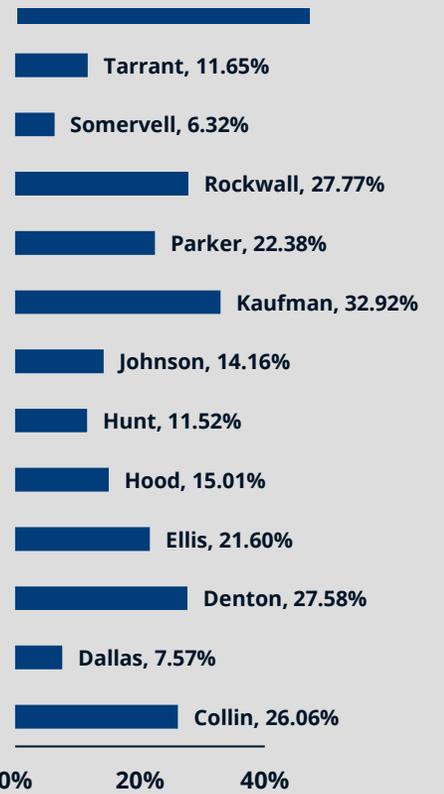
**Note:** DFW MSA estimates aggregate the thirteen counties in the Dallas-Plano-Irving metropolitan division.

**Source(s):** TDC 2022 Estimates; Census Decennial Census (Total Population)

### Total Population 2020-2060



### % Growth 2020-2030 2020-2030



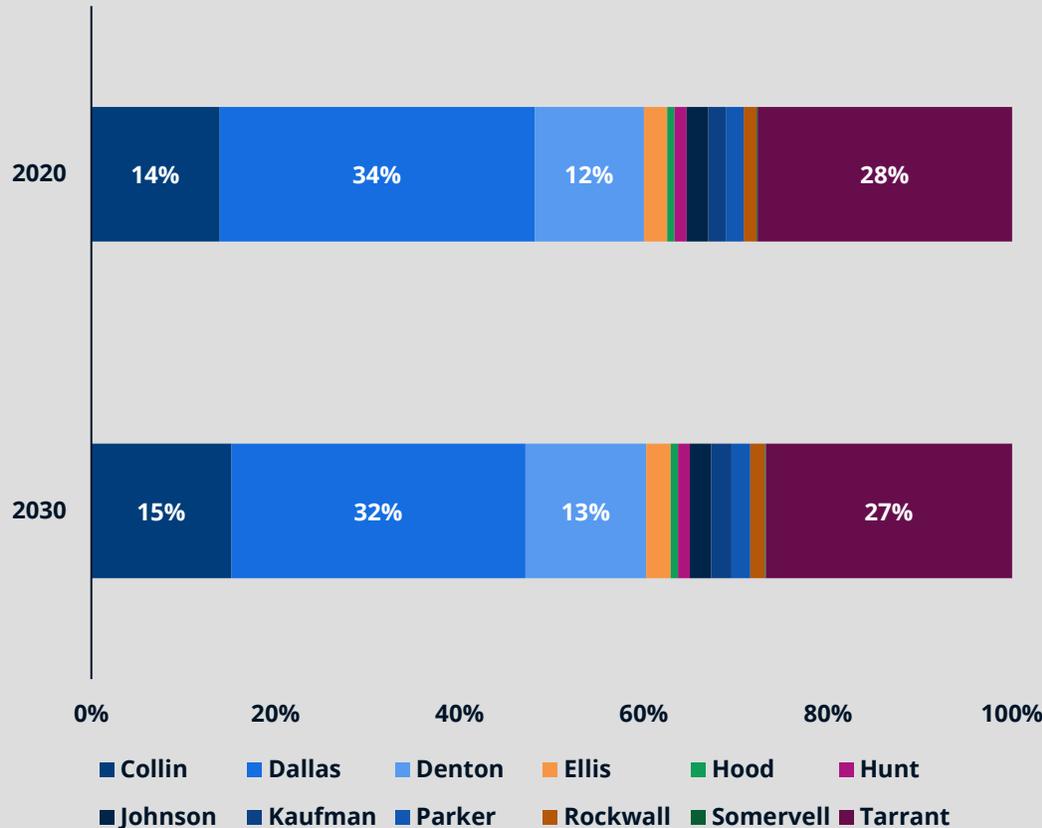
## FUTURE HOUSING NEEDS | POPULATION GROWTH

Dallas County will add 198,000 households, contributing to 9% of the MSA's population growth. Dallas County's share of total metro population is projected to fall to 32% from 34%.

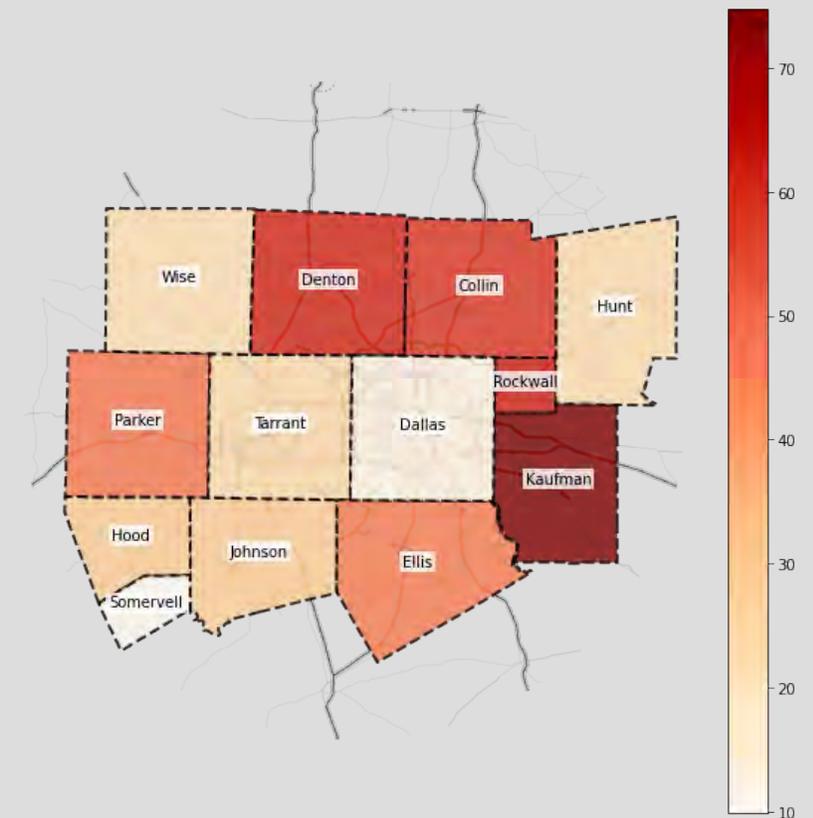
While Dallas County is projected to grow, other counties in the Dallas MSA are projected to grow at a faster rate.

Most growth is projected to be in Denton and Collin counties, with additional growth in exurban counties like Rockwall and Kaufman. This suggests that people are increasingly choosing to live in outlying areas and the trend of people moving further away from the city center is likely to continue over time.

### Projected Share of Population by County 2020, 2030



### Projected Population Change by County 2020-2030



Source(s): TDC 2018, 2022; ACS 2021 5-year, B01003. Total Population.

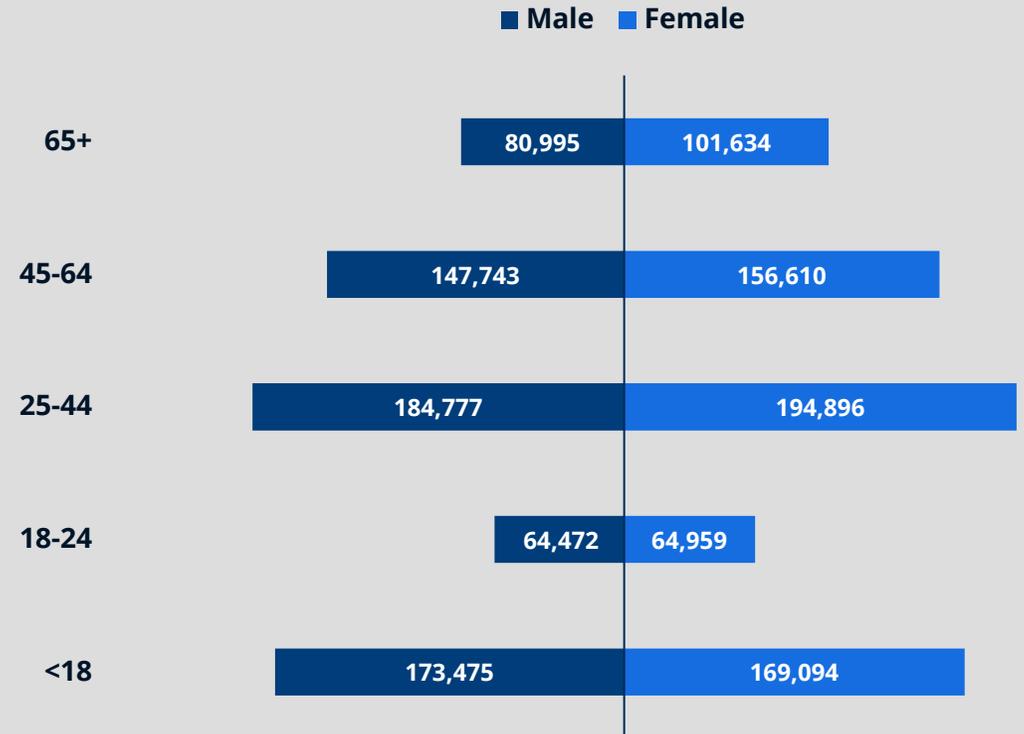
## FUTURE HOUSING NEEDS | POPULATION GROWTH

Population projections are further subdivided into age and sex cohorts, using 2018 TDC distribution estimates.

TDC projects the future county population by sex and age cohort. HR&A allocated 51% of the total population for the county to the city, using the existing population share distribution. HR&A assumed that the age distribution of the population would be the same as the county—based on very similar existing age distributions.

Projections released in 2022 are not available at the MSA level. MSA forecasts aggregate the County-level projections to find the weighted average distributions by cohort.

### City of Dallas Projected Distribution of Population 2030



## FUTURE HOUSING NEEDS | LABOR FORCE PARTICIPATION

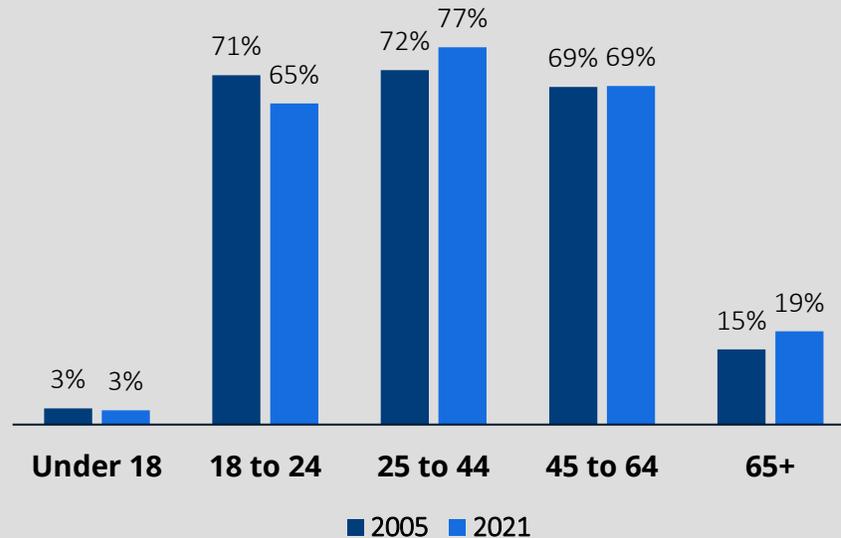
Each cohort—identified by age and sex—can be further categorized by their labor force participation, based on historical trends.

Labor force participation across the metro has remained relatively steady since 2005—except for a slight increase in older female participation (65+) and a decline in male labor force participation for young men aged 18 to 24. While notable, HR&A did not project these trends out to 2030 and rather used the 2021 labor force participation rates to calculate projected labor force by age and sex.

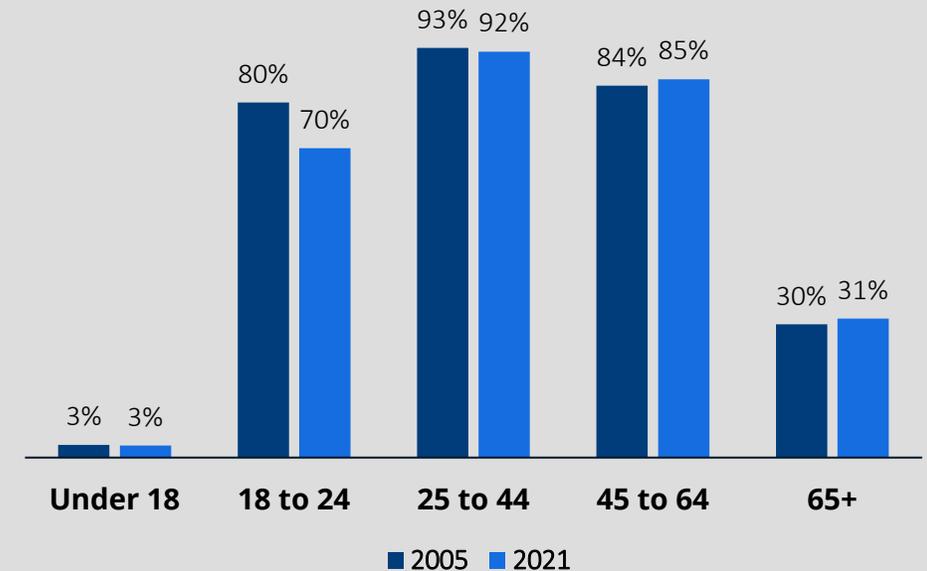
This is due to the relative recent volatility in labor force participation nationwide due to the Covid-19 pandemic and its repercussions. While the volatility is present in national BLS data, it is not clear if these trends are yet captured in ACS and PUMS data.

### City of Dallas Labor Force Participation 2005, 2021

#### Female



#### Male



**Source(s):** TDC 2018, 2021; ACS PUMS Distributions 2021 accessed through IPUMS (EMPSTAT, PWGTP, SOC, AGE, SEX).

**Note:** The labor force is the working age population (16-65) that is employed or is actively seeking employment.

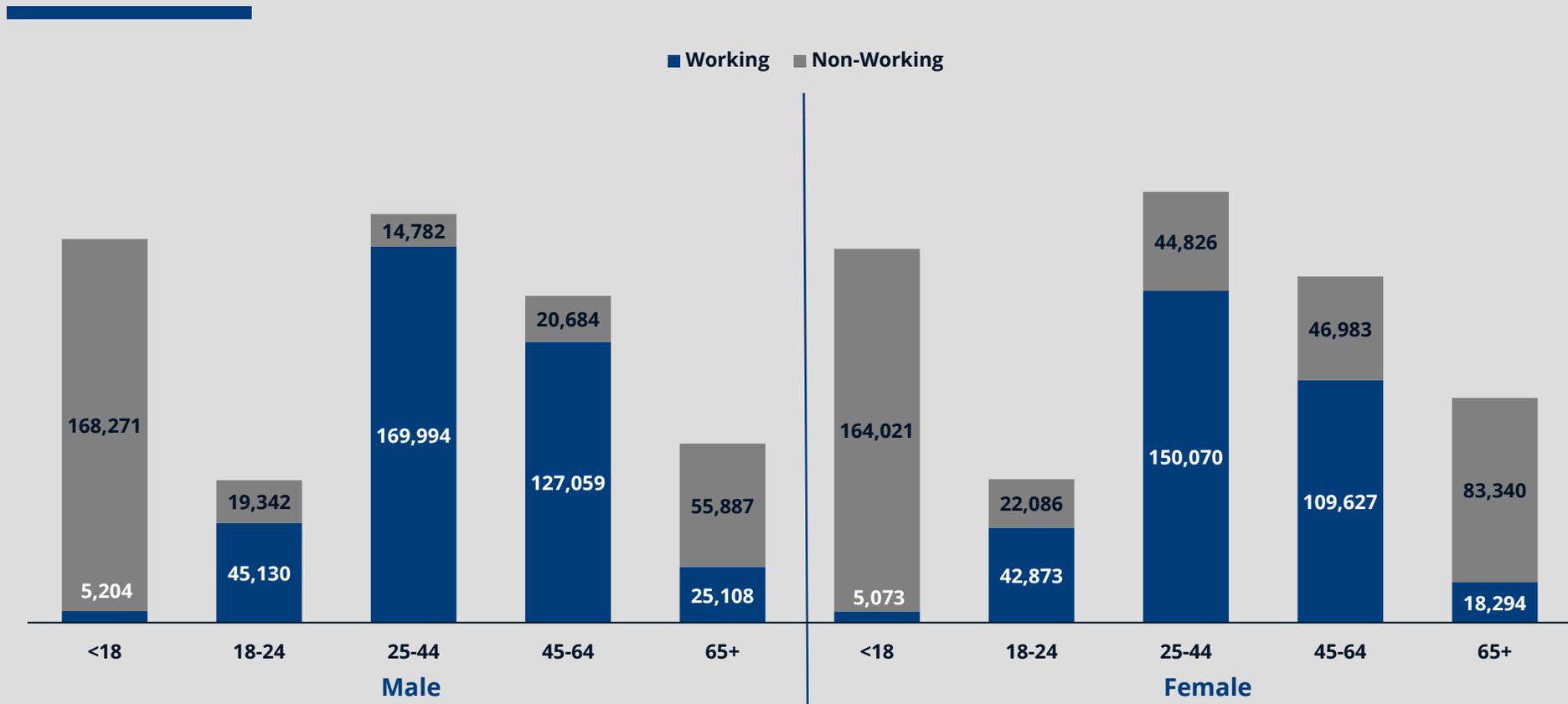
## FUTURE HOUSING NEEDS | LABOR FORCE PARTICIPATION

The city is projected to have about 698,000 workers in 2030, and 640,200 residents not in the labor force—concentrated among children and seniors.

Overall, the highest labor force participation is observed among males aged 25-44 (92%), followed by males aged 45-64 (86%). In comparison, female labor force participation is lower across all age groups, with the highest rate found among females aged 25-44 (77%). Both male and female populations display the lowest labor force participation in the under 18 age group, at 3%.

### City of Dallas Projected Labor Force Participation

2030



**Source(s):** TDC 2018, 2021; ACS PUMS Distributions 2021 accessed through IPUMS (EMPSTAT, PWGTP, SOC, AGE, SEX).

## FUTURE HOUSING NEEDS | LABOR FORCE PARTICIPATION

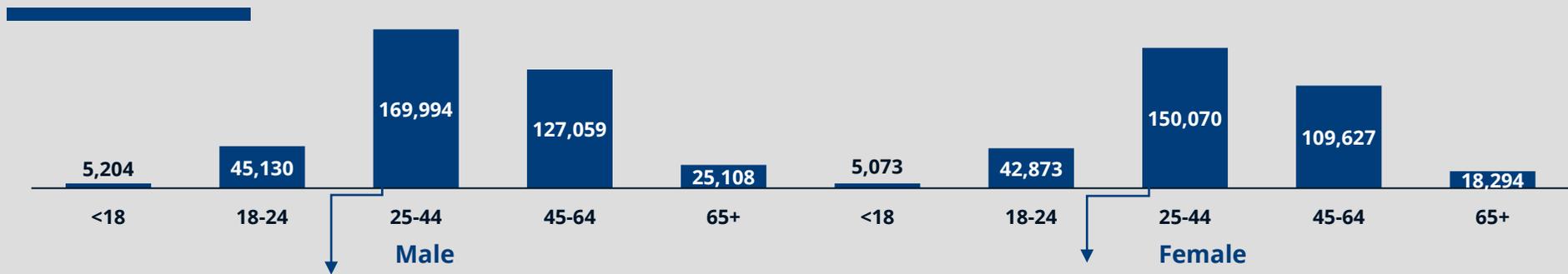
Each labor cohort can be further distributed by their estimated wages—based on the Department of Labor’s occupation and wage projections for 2030.

Labor force projections align population with occupation projections by providing sex, age, and wage distributions.

Each labor cohort was distributed by sex and age to calculate the number of individuals in each cohort aggregated into full set of workers.

### City of Dallas Projected Labor Force Participation and Wages

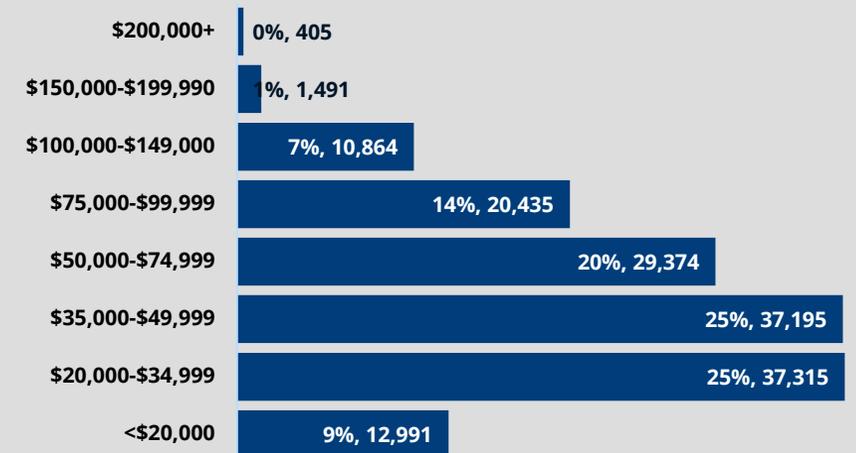
2030



#### Male 25-44 Proj. Distribution of Wages (2030, 2022\$)



#### Female 25-44 Proj. Distribution of Wages (2030, 2022\$)



**Note:** The labor force is the working age population (16-65) that is employed or is actively seeking employment. Numbers may not add due to rounding.

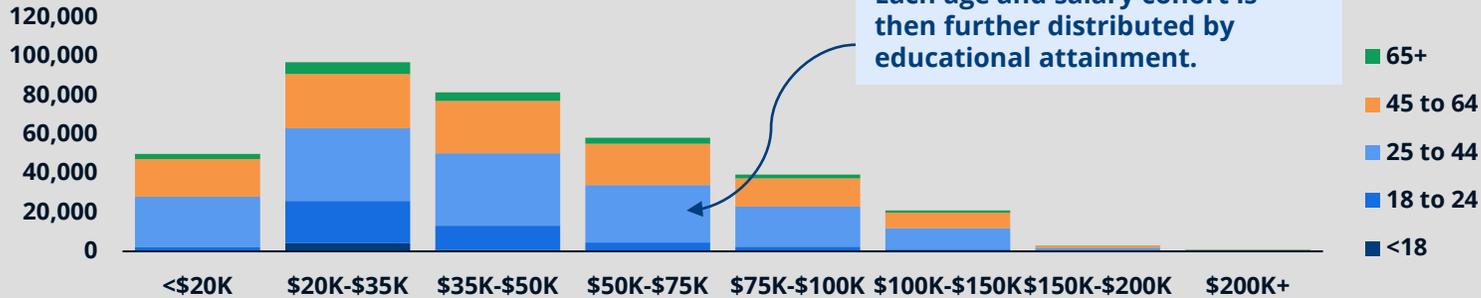
**Source(s):** TDC 2018, 2021; ACS PUMS Distributions 2021 accessed through IPUMS (EMPSTAT, PWGTP, SOC, AGE, SEX).

## FUTURE HOUSING NEEDS | WORKERS BY INCOME

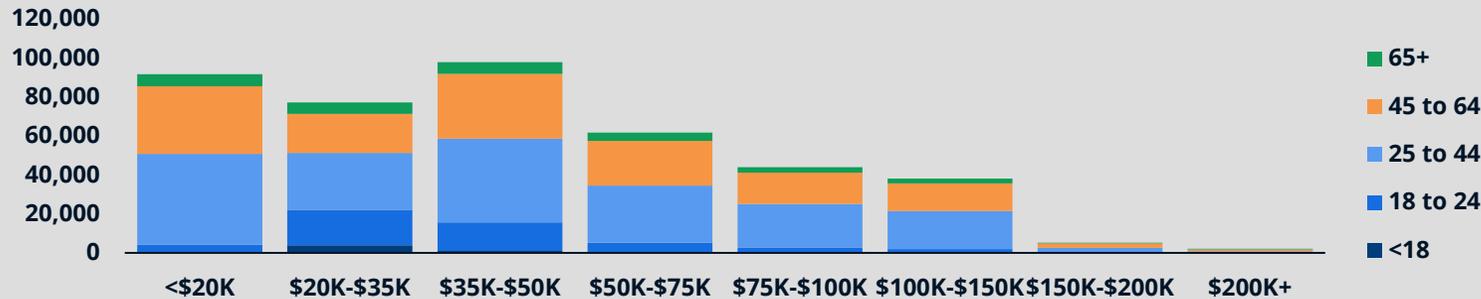
With independent cohorts by sex, age, and median wage, we can sort people into households based on national characteristics.

**City of Dallas Forecasted Employees by Income and Age**  
2030, in 2022\$

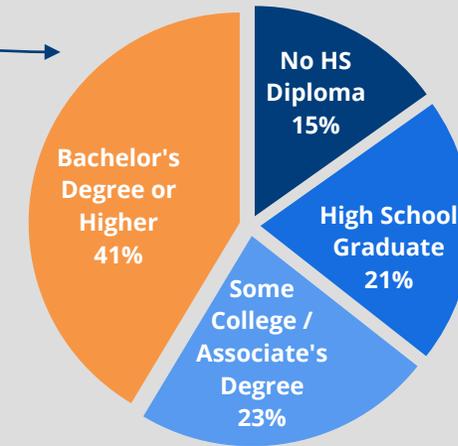
### Female



### Male



**Educational Attainment**  
Women Earning \$50-\$75K, Aged 25 to 44:

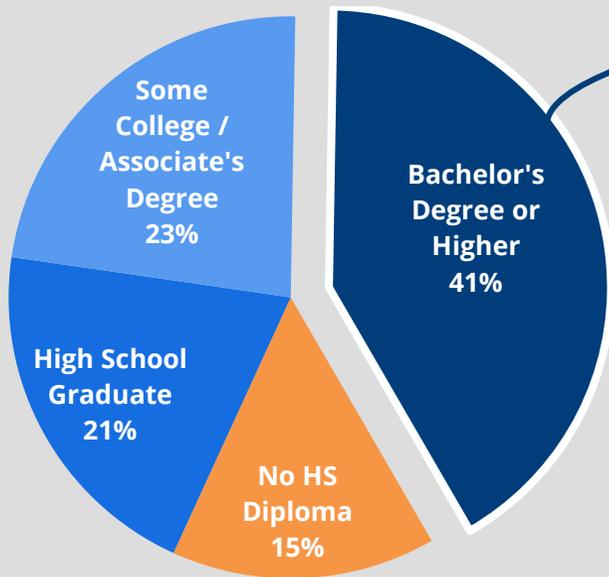


Source(s): EMSI Projections, ACS PUMS Distributions 2021 accessed through IPUMS (WAGP, PWGTP, SOCP, AGEP, SEX).

# FUTURE HOUSING NEEDS | WORKERS BY INCOME

With independent cohorts by sex, age, and median wage, we can sort people into households based on national characteristics.

## Educational Attainment (Illustrative Example) Women Earning \$50-\$75K, Aged 25 to 44:



Household Distribution for:  
 1. Women,  
 2. with Bachelor's Degrees,  
 3. aged 25 to 44, and  
 4. earning between \$50K-\$75K.

By Tenure  
 Owners      Renters



The value in each square represents the number of people out of 100 in a cohort with a given household size, household income and tenure.

Ex. 3 of every 100 people in this cohort will be owners in a household with 5 or more people with a household income of \$100-\$150K.

Source(s): EMSI Projections, ACS PUMS Distributions 2021 accessed through IPUMS (WAGP, PWGTP, SOCP, AGEP, SEX).

## FUTURE HOUSING NEEDS | PROJECTED HOUSEHOLDS BY AMI

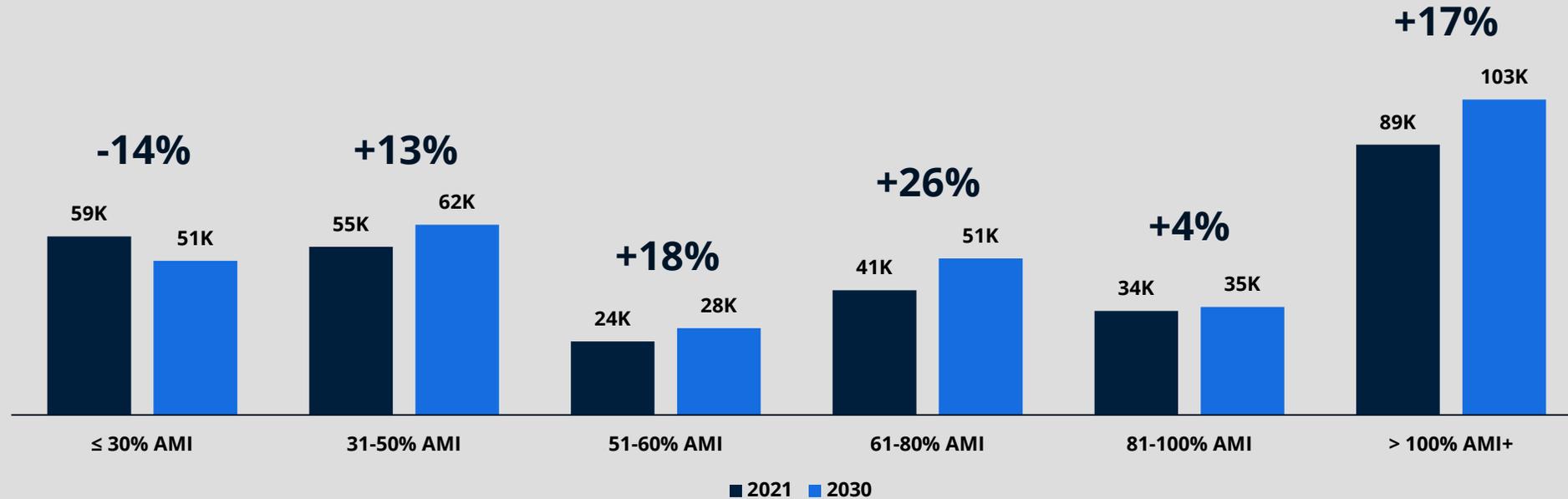
Based on growth trends by occupation, 90% of new renter households are expected to earn more than 60% of the AMI—and wage increases will reduce the share of renters earning less than 30% of the AMI.

The City of Dallas is projected to add 30,120 new renter households by 2030, with the largest increase in households earning more than 100% of AMI.

**90% of the growth** is projected to be in households earning **more than 60% of AMI** (26,700 households).

There is a slight projected decrease in renters earning below 30% of AMI by 8,000 households (14%), due to increasing wages in lower-wage jobs.

### Renter Households by AMI (2021,2030 (projected))



**Source(s):** PUMS, State of Texas (TEPP) Projections, ACS, 2021 5-year, HUD AMI Limits.

**Note:** Numbers may not add to totals as figures are rounded to the nearest 1,000.

## FUTURE HOUSING NEEDS | FUTURE HOUSING SUPPLY

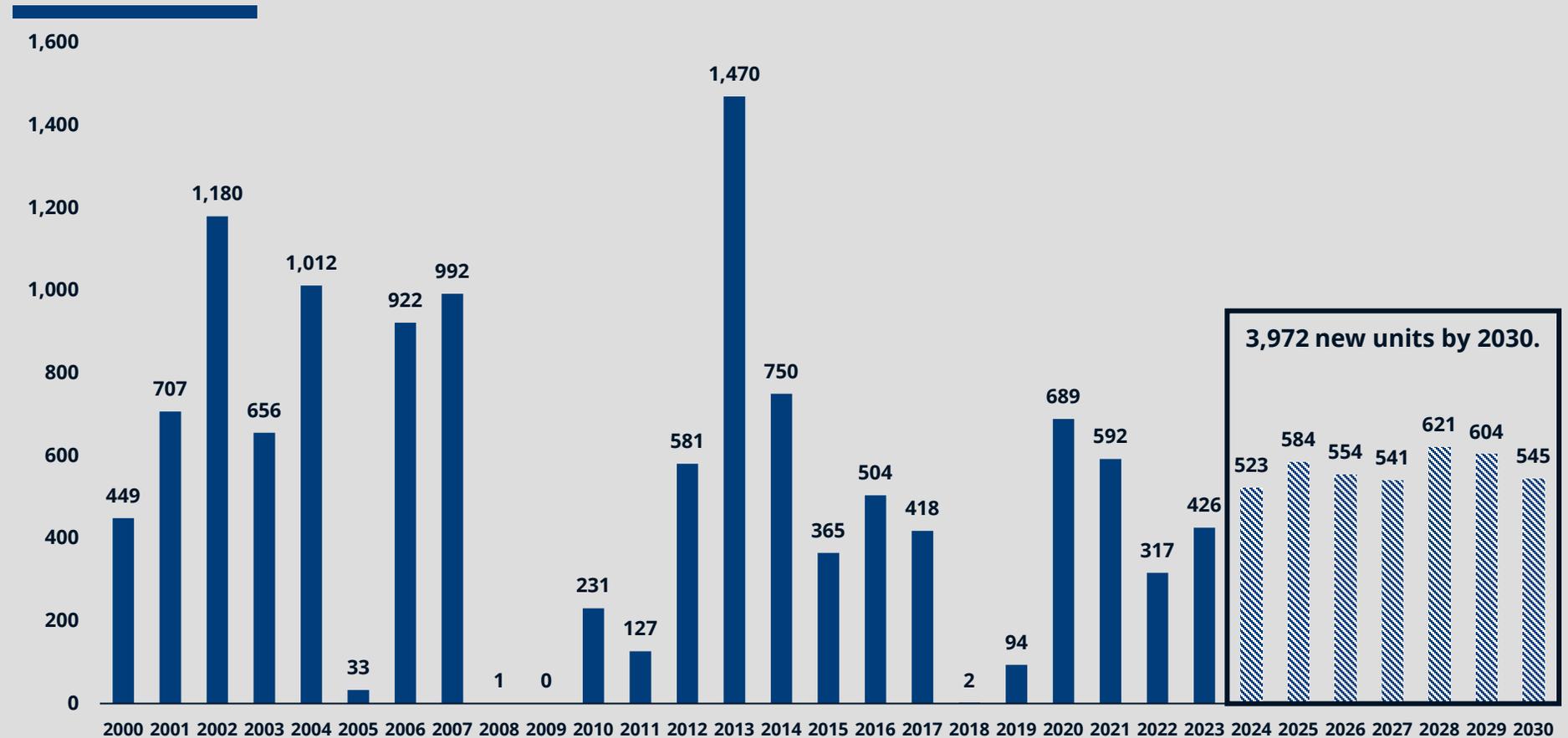
Deliveries of units with deed-restricted affordability have been much more volatile, based on statewide allocations and site availability.

The number of affordable unit deliveries in Dallas fluctuates considerably from year to year. In some years, such as 2002, 2003, and 2014, there were large increases in the number of new units delivered, while in other years, such as 2005 and 2009, the number of new units was much lower.

One possible explanation for these fluctuations could be changes in funding for affordable housing programs, through the Low-Income Tax Credit (LIHTC) which could result in more or less construction of new units in a given year.

The projection of 3,972 new units by 2030 is based on the long-term average production but will likely be a lot more volatile than the time series projection indicates.

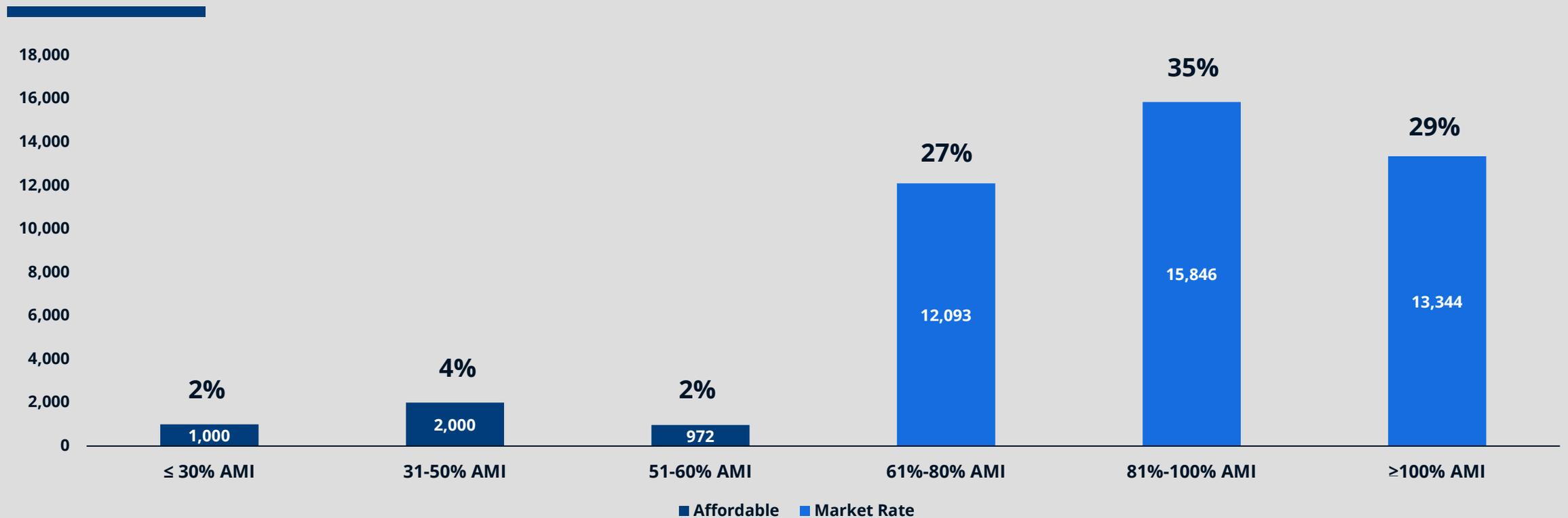
**Deed-Restricted Rental Units by Year**  
(2010,2030 (projected))



## FUTURE HOUSING NEEDS | FUTURE HOUSING SUPPLY

These current trends suggest that production over the next decade will be skewed towards higher income renters, with 63% of new development only affordable to households earning above 80% of AMI.

**Units Built 2021-2030 by Affordability**  
(2030 (projected))



*Source(s): CoStar, State of Texas (TEPP) Projections, NHPD, HUD AMI Limits, PUMS ACS, 2021 5-year Estimates, Variables: WGTP, ADJINC, ADJHSG, BDSP, BLD.*

## FUTURE HOUSING NEEDS | EXISTING HOUSING SUPPLY

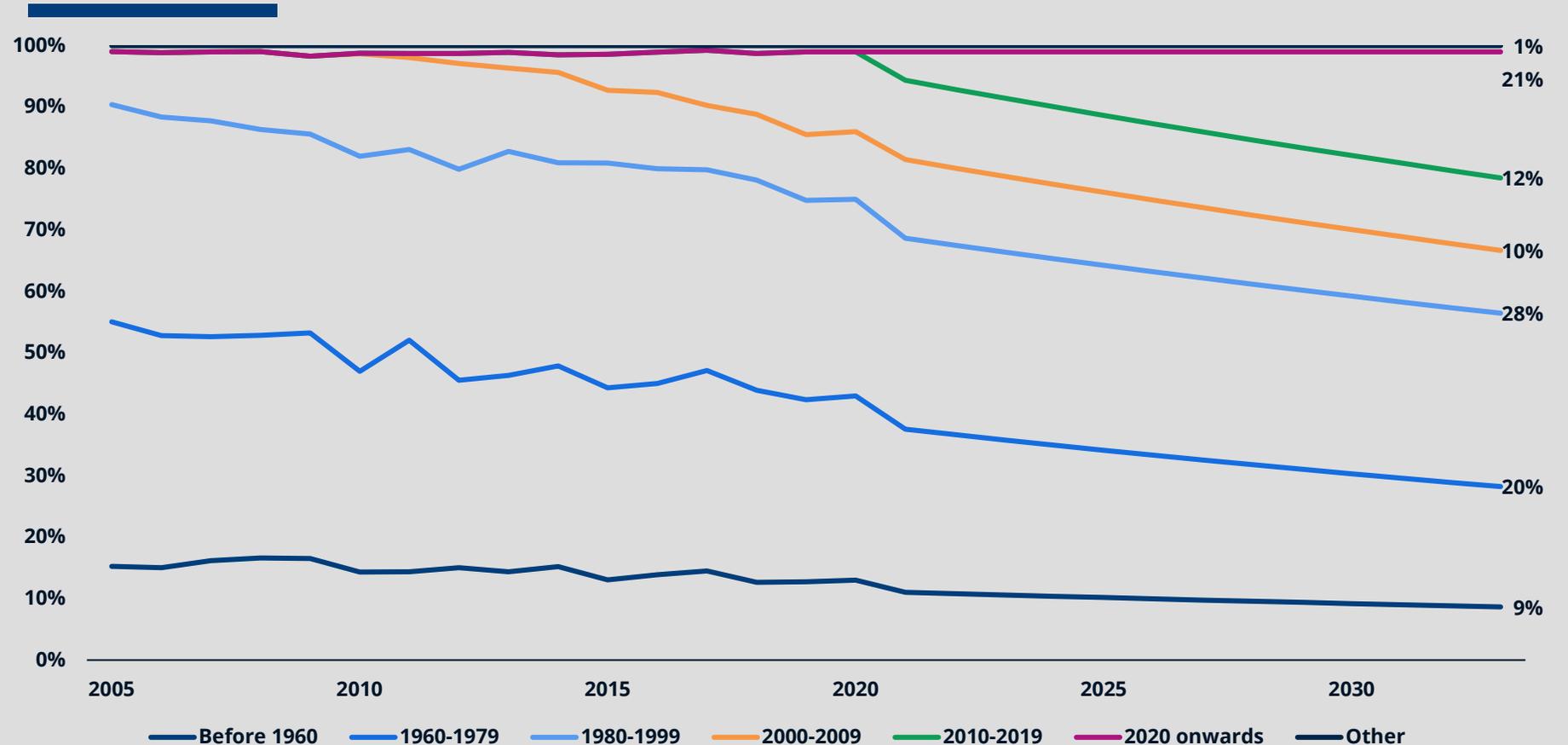
Existing units in the market can be lost due to redevelopment, structural loss, or conversion to ownership. Older units will account for a smaller share of the overall rental stock, with 43% of available units by 2030 projected to be built before 2000.

Overall, there has been a gradual shift towards newer rental units as they come online, with a declining share of units built before 1960 and an increasing share of units built after 2000.

From 2005 to 2019, the largest share of rental units were built in the 1960s to 1990s, ranging from 30% to 38% of total rental units. The share of units built before 1960 declined from 17% to 13% over this period, while the share of units built after 2000 increased from 9% to 13%.

From 2020 to 2033, the share of rental units built before 1960 is projected to decline further, reaching 9% by 2030 and remaining stable thereafter. The share of units built after 2000 is expected to continue increasing, reaching 19% in 2026 before stabilizing at 12-13% by 2033.

**Presence of Units by Year Built (2005-2030)**



**Source(s):** CoStar, State of Texas (TEPP) Projections, NHPD, HUD AMI Limits, PUMS, ACS 2021 5-Year Estimates, Variables: WGTP, DECADE, BLD, HR&A Calculations.

## FUTURE HOUSING NEEDS | EXISTING HOUSING SUPPLY

Units were filtered into 15 typologies based on decade built and type of unit. While most units filter down in relative rent, the speed of decline depends on the location and typology.

Rent filtering is a concept that describes the process through which housing units "filter down" through the market over time, becoming more affordable to lower-income households as they age and depreciate in value.

In a strong housing market like Dallas, demand for housing is high, and property values and rents are generally increasing. This can put pressure on the supply of affordable housing. However, rent filtering can still occur in such a market, albeit at a slower pace or in a more limited capacity.

### Here's how rent filtering works in Dallas:

- 1. New construction:** In a strong housing market, developers typically build new housing units, often targeting higher-income households with more expensive, higher-quality units. This is because the profit margins are higher for these types of developments, and properties need to recoup construction costs.
- 2. Depreciation:** Over time, housing units naturally age and depreciate. As a result, their rental prices or sale values decrease relative to newer, more modern units. In a strong housing market, this depreciation process might happen more slowly, as demand for housing remains high, and landlords can still charge relatively high rents.
- 3. "Filtering down":** As older housing units depreciate, they eventually become more affordable to lower-income households. This is the process of filtering, where units that were once considered high-end eventually become more accessible to a broader range of income groups.

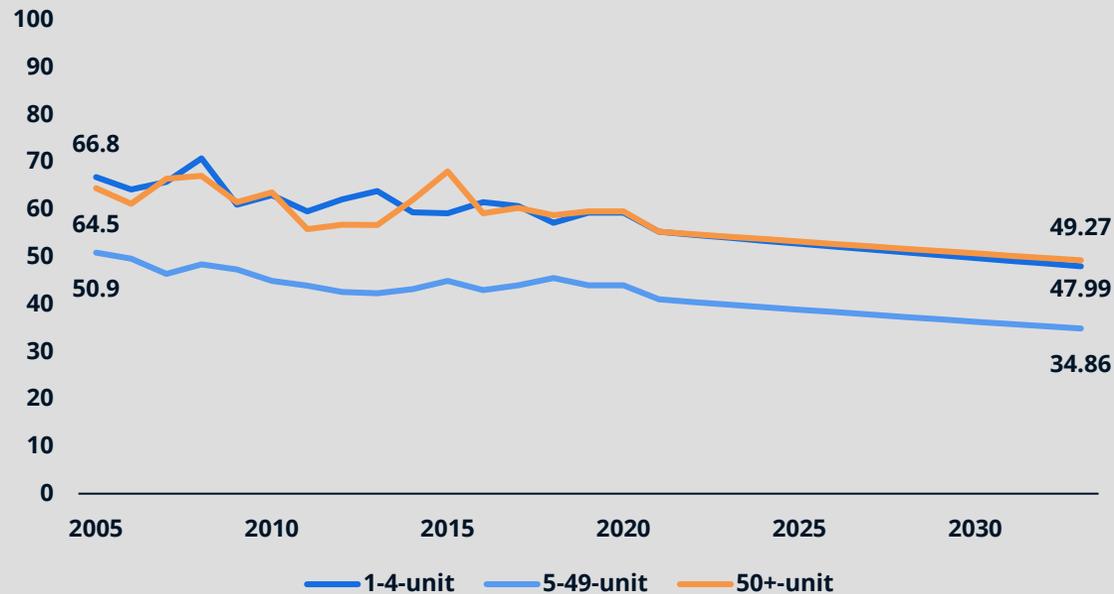


## FUTURE HOUSING NEEDS | EXISTING HOUSING SUPPLY

Each of the 15 typologies were processed through time series projections to estimate where rents would be relative to the market by 2030.

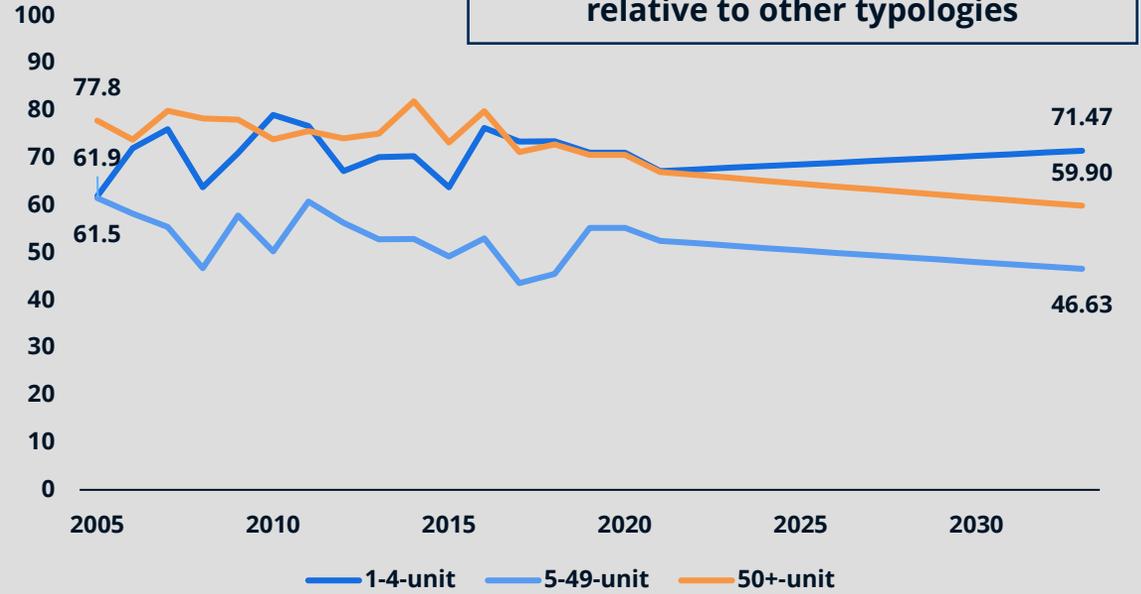
### Relative Rent Percentile by Typology

Built between 1980-1999 50+ Unit buildings



### Relative Rent Percentile by Typology

Built between 2000-2009 50+ Unit buildings



## FUTURE HOUSING NEEDS | EXISTING HOUSING SUPPLY

Each typology was then processed through three rent scenarios: a base case, a median case, and an aggressive case—based on annual median rent increase projections.

Units that are affordable for households earning at or below 50% of AMI are projected to fall by more than 60% (50,000 net units).

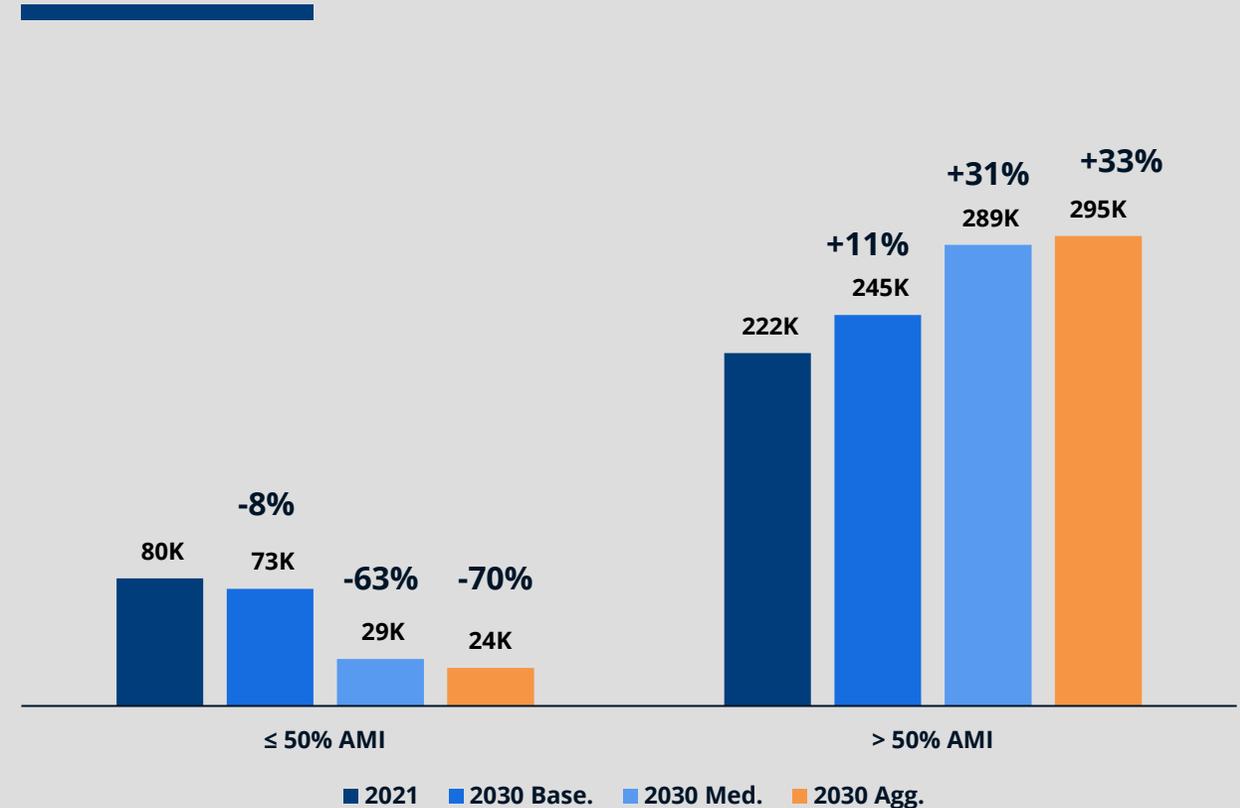
The median case projects a drop of more than 60% in units renting for less than 50% of AMI, while the base case projects a loss of 8%, and the aggressive rent growth scenario projects a 70% loss in units.

Supply projections account for loss of units due to redevelopment, new units (market-rate and deed-restricted affordable) and change in rents for existing units.

- The **base case** projects a median rent growth rate of 3% annually.
- The **median case** projects a growth rate of 5.5% annually—in line with historic rent trends since 2015.
- The **aggressive growth rate** projects growth rates at 7%—in line with the 3-year average pandemic rent growth rate.

Each case assumes a different rent growth rate, resulting in varied future rents, levels of affordability, and housing gaps.

City of Dallas Rental Units by AMI Level  
(2021, 2030 (projected))



## FUTURE HOUSING NEEDS | CITY-SUBSIDIZED SUPPLY

The City of Dallas has created a series of programs that have supported and will continue to drive the development of new affordable and market rate housing for Dallas residents.

The City of Dallas has worked to create new programs to sustainably increase the supply of units affordable to low- and moderate-income residents. These programs can provide the mechanism to administer subsidies with increased funding.

To create and preserve deeply affordable units, those with rents affordable to renters earning  $\leq 50\%$  AMI, city programs are layered with state and federal subsidy sources, such as LIHTC equity, HOME loans, and tenant- and project-based subsidies. City programs are crucial to developing affordable units in the face of the rising cost to acquire land, construct housing, and preserve affordability.

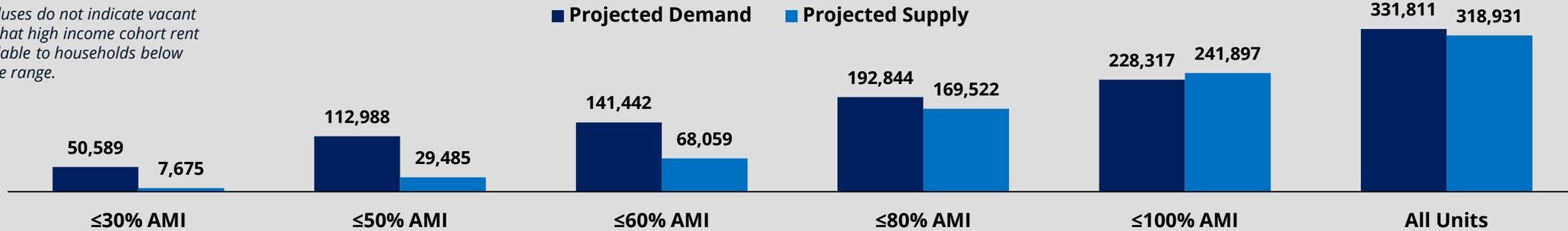
<b>Funding Program</b>	<b>Description</b>	<b>Future Benefit</b>
<b>DEV NOFA</b> <i>Renews funding awards annually</i>	Provides loans and grants to mixed-income development in areas of targeted reinvestment	Reduces the housing gap for $\leq 50\%$ AMI renters
<b>Dallas Housing Finance Corporation Financing</b> <i>Established in 1984</i>	Provides tax-exempt mortgage bonds to support the <ol style="list-style-type: none"> <li>1. repair of existing substandard multifamily developments,</li> <li>2. rehabilitation of existing multifamily developments</li> <li>3. new construction of housing for special needs; and</li> <li>4. Low-Income Housing Tax Credit (LIHTC), with priority given to master-planned, mixed-income and TOD.</li> </ol>	Reduces housing gaps for vulnerable populations, including $\leq 50\%$ AMI renters
<b>Dallas Housing Acquisition and Development Corporation</b> <i>Established in 2004</i>	Provides a land bank that acquires and transfers uninhabitable property to support the creation of units affordable to $\leq 115\%$ AMI renters	Increases the availability of rent-stabilized housing units
<b>Mixed Income Housing Development Bonus (MIHDB)</b> <i>Established in 2020</i>	Provides developers the ability to trade additional development rights in multifamily and mixed-use developments for onsite affordable housing units or a fee in lieu of onsite units	Reduces the rental housing gap for $\leq 80\%$ AMI renters and increases access to areas of high opportunity
<b>Dallas Public Facility Corporation Financing</b> <i>Established in 2020</i>	Provides financing and refinancing to support the creation of units affordable to $\leq 80\%$ AMI renters	Reduces the housing gap for $\leq 80\%$ AMI renters
<b>Community Land Trust</b> <i>Established in 2020</i>	Provides homes affordable to purchase to low- and moderate-income residents by offering nonprofits tax exemptions and the ability to separate the cost of owning land and its improvements with a 99-year ground lease	Increases availability of affordable units for low-income resident ownership

## FUTURE HOUSING NEEDS | HOUSING GAP

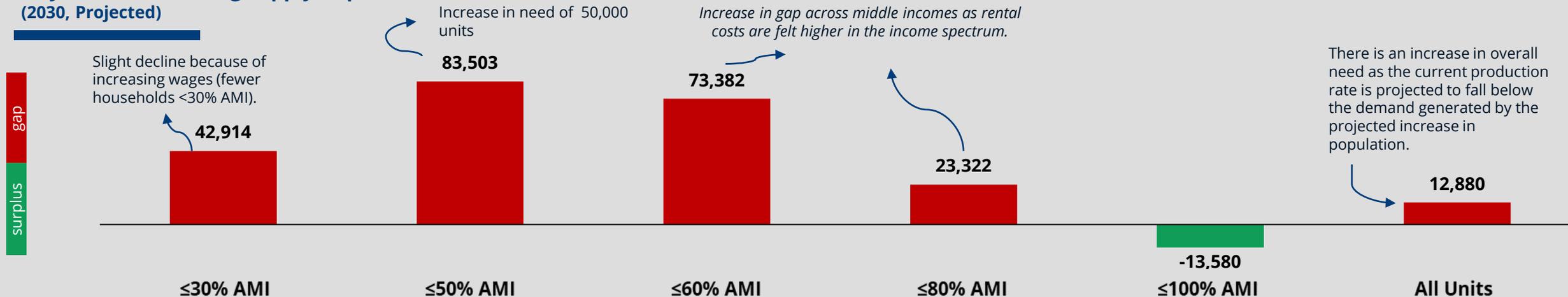
Given our demand and supply projections, the gap is projected to increase from 33,660 units to **83,503 units for households at or below 50% of AMI**. The gap is also projected to affect **households up to 80% of AMI**.

### City of Dallas Housing Supply Gap (2030, Projected)

*Note: Surpluses do not indicate vacant units, only that high income cohort rent units affordable to households below their income range.*



### City of Dallas Housing Supply Gap (2030, Projected)

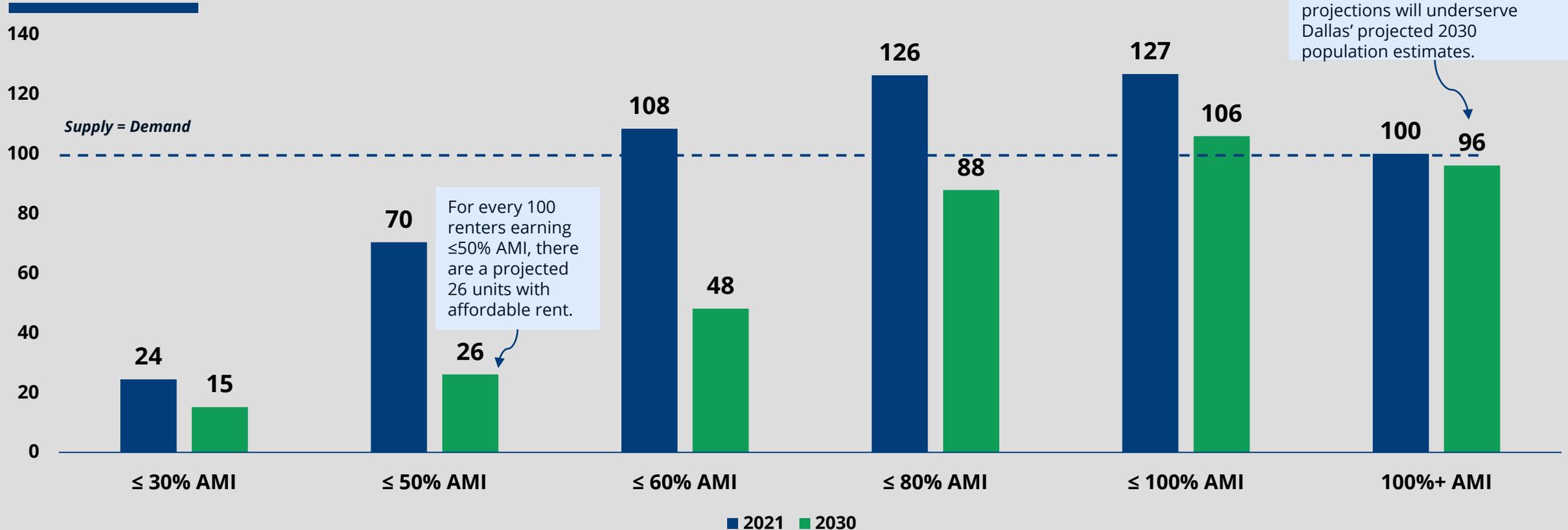


## FUTURE HOUSING NEEDS | HOUSING GAP

By 2030, there will be only **26 units affordable for every 100 households at or below 50% of AMI**, and only 48 units affordable for every 100 households at or below 60% of AMI.

### Units Affordable per 100 Renter Households by Income

(2030, Projected)



**Source(s):** PUMS 2021, ACS 2021 5-year estimates, Variables: WGTP, GRNTP, ADJHSG, Income AMI CATS, Tenure, HR&A Calculations.

**Note:** Higher-income cohorts may elect to live in units below their means, widening each gap for lower-income cohorts.

# Rental Housing Needs Assessment

**City of Dallas**

Spring 2023

For more information, please contact:

**Ashley Flores**, Senior Director  
[ashley@childpovertyactionlab.org](mailto:ashley@childpovertyactionlab.org)



# Appendix

# APPENDIX | LIST OF PROPERTIES: COUNCIL DISTRICT 1

## District: 1

### Market Rate (Built Since 2010 Only)

New Properties Since 2010:		# Units: 4,526			
Property Name	Property Address	Total Units	Year Built	Building Status	
High Point Senior Living	1615 S Zang Blvd	140	2012	Existing	
Zang Triangle Apartments*	390 E Oakenwald St	(51) 258	2012	Existing	
No Name	810 S Madison Ave	8	2013	Existing	
Bellrock Bishop Arts	1836 W Davis St	207	2013	Existing	
Magnolia At Bishop Arts	801 N Bishop Ave	38	2014	Existing	
Notre Dame Court	801 S Madison Ave	69	2014	Existing	
Oaks Trinity*	333 E Greenbriar Ln	(34) 167	2014	Existing	
No Name	620 N Bishop Ave	8	2015	Existing	
High Point Family Living	414 W Louisiana Ave	161	2016	Existing	
Magnolia On Zang	901 N Zang Blvd	43	2017	Existing	
Victor Prospers*	196 W Davis St	(44) 209	2017	Existing	
Axis Kessler Park	2400 Fort Worth Ave	299	2017	Existing	
No Name	407 W 10Th St	12	2018	Existing	
No Name	427 W 10Th St	12	2018	Existing	
Bishop Flats	305 Melba St	118	2018	Existing	
Victor Prosper	195 W Davis St	222	2018	Existing	
Vance At Bishop Union	101-111 W Davis St	302	2018	Existing	
No Name	708 W 9Th St	4	2020	Existing	
Coop At Bishop	410 W 9Th St	18	2020	Existing	
Bardo Lofts	727 N Zang Blvd	28	2020	Existing	
Magnolia On Zang li	830 N Zang Blvd	64	2020	Existing	
Bishop Highline	120 N Madison Ave	112	2020	Existing	
Bishop North	200 N Bishop Ave	246	2020	Existing	
Skyline Trinity	1900 N Beckley Ave	258	2020	Existing	
No Name	1135-39 Kings Hwy	8	2021	Existing	
No Name	617 N Tyler St	13	2021	Existing	
Treehaus	211 W 10Th St	34	2021	Existing	
Echelon At Reverchon Bluffs	2603 W Davis Ave	82	2021	Existing	
212 Melba	212 Melba St	55	2022	Existing	
Zang Flats	1102 N Zang Blvd	71	2023	Under Construction	
Banyan Beckley	1710 N Beckley Ave	279	2023	Under Construction	
Banyan Flats	2020 N Beckley Ave	289	2023	Under Construction	
The Beckley On Trinity	111 Morgan Ave	340	2023	Under Construction	
The Boheme	1207 N Zang Blvd	352	2023	Under Construction	

### Affordable (All Units)

Total Properties		27# Units		2,900	
Property Name	Property Address	Total Units	Year Funded	Construction Date	Building Status
Notre Dame Place	800 N Madison Ave	8	1970	No Data	Active
Cherbonay @ Marsalis Independent Lc	412 N Marsalis Ave	12	2021	2004	Active
No Name	717 Comal St	12	1998	1998	Active
No Name	720 N Lancaster Ave	20	1961	1961	Active
Oakridge Apartments	2803 W Illinois Ave	46	1981	No Data	Active
Hillcrest House	834 N Marsalis Ave	64	2006	No Data	Active
Notre Dame Court	801 S Madison Ave	68	2012	2008	Active
Casa Trevino	1901 W Davis St	85	2016	1985	Active
Villas At Western Heights	1501 Fort Worth Ave	130	1997	No Data	Active
High Point Senior Living	1615 S Zang Blvd	140	1996	No Data	Active
Highpoint Family Living	414 W Louisiana Ave	161	2020	No Data	Active
Cliff Manor	2423 Fort Worth Ave	180	2004	No Data	Active
Parks At Wynnewood Apartments The	1910 Argentia Dr	276	2013	1990	Active
No Name	312 N Patton Ave	9	1968	No Data	Inactive
720 W Ninth St	720 W 9Th St	10	1969	No Data	Inactive
Prince William	504 N Marsalis Ave	12	2022	No Data	Inactive
Village Of Forest Hills I	1919 Stevens Forest Dr	93	1989	No Data	Inactive
French Colony	1235 Hartsdale Dr	94	1972	No Data	Inactive
Remond Cliff Plaza Apartments	2936 Remond Dr	110	1971	No Data	Inactive
Villas Of Remond	3050 Remond Dr	131	2016	No Data	Inactive
Indian Ridge Apartments	3706 W 8Th St	161	1989	No Data	Inactive
Wynnewood Family Housing	2048 S Zang Blvd	161	2013	No Data	Inactive
Tyler Street Manor	922 W 9Th St	181	1998	No Data	Inactive
No Name	520 W Page Ave	227	2003	No Data	Inactive
Telstar Apartments	510 Westmount Ave	100	1989	No Data	Inconclusive
Mill Run	2732 W Colorado Blvd	112	1972	No Data	Inconclusive
Park Creek Manor Apartments	2530 Coombs Creek Dr	297	1988	No Data	Inconclusive

**Note(s):** Asterisked (\*) properties leverage Public Facility Corporation or TIF financing. Units in parenthesis denote units with rents restricted as part of a financing agreement.

**Source(s):** NHPD, CoStar, HR&A Calculations.

# APPENDIX | LIST OF PROPERTIES: COUNCIL DISTRICT 2

## District: 2

### Market Rate (Built Since 2010 Only)

New Properties Since 2010:		# Units:	22,291		
Property Name	Property Address	Total Units	Year Built	Building Status	
Bel Air On Maple	5219 Maple Ave	122	2011	Existing	
Camden Henderson	5222 Belmont Ave	106	2012	Existing	
Lakewood Flats	7425 La Vista Dr	435	2012	Existing	
4950 Cedar Springs	4950 Cedar Springs Rd	15	2013	Existing	
Amlt On Maple	6008 Maple Ave	300	2013	Existing	
Strata	5050 Capitol Ave	311	2013	Existing	
Berkshire Medical District	4730 Fairmount St	325	2013	Existing	
Park 5940 Md	5940 Forest Park Rd	343	2013	Existing	
Maddox	2660 N Haskell Ave	356	2013	Existing	
The Southwestern	5959 Maple Ave	359	2013	Existing	
Cityplace Heights	4030 N Central Expy	396	2013	Existing	
Magnolia At Wycliff	4320 Dickason Ave	32	2014	Existing	
The Belleview	1401 Browder St	164	2014	Existing	
Maple At Med Center*	5522 Maple Ave	(52) 249	2014	Existing	
Moda	1855 Payne St	263	2014	Existing	
Century Medical District	6162 Maple Ave	288	2014	Existing	
4110 Fairmount	4110 Fairmount St	299	2014	Existing	
Axis At Wycliff Apartments	4343 Congress Ave	334	2014	Existing	
Locale	3301 Hudnall St	348	2014	Existing	
Arpeggio At Victory Park	2425 Victory Ave	377	2014	Existing	
3333 Elm Street Lofts	3333 Elm St	19	2015	Existing	
Loft+Row	2110 N Peak St	180	2015	Existing	
Echo Apartment Homes	3083 Herschel Ave	200	2015	Existing	
South Side Flats	1210 Botham Jean Blvd	288	2015	Existing	
Eleven10 At Farmers Market Apartments	1110 S Cesar Chavez Blvd	313	2015	Existing	
Maple District Lofts	5415 Maple Ave	342	2015	Existing	
Cortland Oak Lawn	4210 Fairmount St	368	2015	Existing	
Capitol Ave Townhomes	5202 Capitol Ave	11	2016	Existing	
The Collection At Live Oak	4901 Live Oak St	13	2016	Existing	
The Rowe Townhomes	2119 Bennett Ave	25	2016	Existing	
Bellaveux	3280 Cedar Plaza Ln	36	2016	Existing	
Magnolia On Moser	2103 Moser Ave	42	2016	Existing	
27Twentyseven	2727 Kings Rd	152	2016	Existing	
Butler Brothers Building	500 S Ervay St	237	2016	Existing	
Windsor West Lemmon	3650 Cedarplaza Ln	248	2016	Existing	

### Affordable (All Units)

Total Properties		# Units	3,509		
Property Name	Property Address	Total Units	Year Funded	Construction Date	Building Status
Caldwell House	1323 Caldwell St	6	2013	2000	Active
Fowler Christian Apartments Iii	5822 Eastside Ave	36	1993	No Data	Active
Prince Of Wales	4515 Live Oak St	61	1990	1903	Active
Villa Santa Maria	1830 Bennett Ave	68	1983	1992	Active
Treymore North Apartments	4144 Office Pkwy	70	1995	No Data	Active
Carroll Townhomes	2202 Kirby St	71	1999	No Data	Active
Arlington Park Villas	1716 Chattanooga Pl	100	1999	No Data	Active
Marthas Vineyard	3115 Crestview Dr	100	2015	No Data	Active
Paradise Gardens	1500 N Garrett Ave	114	2006	1978	Active
The Pegasus Apartments	7200 N Stemmons Fwy	156	1988	No Data	Active
1400 Belleview	1400 Bellview St	164	2001	No Data	Active
Cedar Springs Place	2533 Lucas Dr	182	1996	No Data	Active
Birchwood Apartments	4829 Coles Manor Pl	293	1995	1968	Active
Roseland Townhomes Phase I	2110 N Carroll Ave	514	1999	2001	Active
The Belleview*	1401 Browder St	164	2014	2014	Active
No Name	3207 Culver St	1	1900	No Data	Inactive
Reiger Apartments	2814 Main St	16	1968	No Data	Inactive
Prairie Hill Apartments	2016 N Prairie Ave	18	1991	No Data	Inactive
Family Gateway 4712 Gaston	4712 Gaston Ave	29	2001	No Data	Inactive
Pines Point	3102 Oradell Ln	327	1990	No Data	Inactive
March Street	4528 March Ave	60	1981	No Data	Inconclusive
Monarch Townhomes	2008 Kirby St	65	1900	No Data	Inconclusive
Park Congress Apartments	2624 Douglas Ave	79	1999	No Data	Inconclusive
Providence Mockingbird	1893 W Mockingbird Ln	251	1975	No Data	Inconclusive
No Name	2210 Canton St	564	2003	No Data	Inconclusive

**Note(s):** Asterisked (\*) properties leverage Public Facility Corporation or TIF financing. Units in parenthesis denote units with rents restricted as part of a financing agreement.

**Source(s):** NHPD, CoStar, HR&A Calculations.

## APPENDIX | LIST OF PROPERTIES: COUNCIL DISTRICT 2 (cont.)

### District: 2

#### Market Rate (Built Since 2010 Only)

Property Name	Property Address	Total Units	Year Built	Building Status
<b>New Properties Since 2010:</b> 127 # Units: 22,291				
Skyline Farmers Market	835 S Good Latimer Expy	340	2016	Existing
The Alexan	3333 Harry Hines Blvd	365	2016	Existing
The Lucas	2924 Lucas Dr	387	2016	Existing
Camden Victory Park	2787 N Houston St	423	2016	Existing
No Name	1715 Bennett Ave	5	2017	Existing
No Name	1725 Bennett Ave	6	2017	Existing
Moser Townhomes	2310 Moser Ave	23	2017	Existing
Magnolia Of Henderson Apartments	2100 Moser Ave	42	2017	Existing
Hartford Townhomes	4316 Hartford St	62	2017	Existing
Haskell Flats	1500 N Haskell Ave	62	2017	Existing
Martha'S Vineyard Place	3110 Cedarplaza Ln	100	2017	Existing
Digit 1919	1919 S Akard St	102	2017	Existing
Magnolia Station	1607 Lyte St	121	2017	Existing
The Collection	2190 Bennett Ave	161	2017	Existing
Harvest Lofts*	1011 S Pearl Expy	(48) 240	2017	Existing
Ascent Victory Park	2588 N Houston St	302	2017	Existing
Larq Henderson Apartments	1945 Bennett Ave	321	2017	Existing
The Case Building	3131 Main St	337	2017	Existing
Inwood Station	2727 Inwood Rd	347	2017	Existing
Victory Place	1701 Payne St	352	2017	Existing
Windsor Fitzhugh	4926 Mission Ave	364	2017	Existing
The Katy In Victory Park	3111 N Houston St	463	2017	Existing
No Name	5022 Belmont Ave	1	2018	Existing
Newly Built 4 Modern Units Medical District	2627 Kimsey Dr	8	2018	Existing
1808 Apt	1808 S Good Latimer Expy	12	2018	Existing
San Jose Apartments	4201 San Jacinto St	23	2018	Existing
The 23	2370 Victory Ave	285	2018	Existing
West Love Apartments	2293 Hawes Ave	368	2018	Existing
No Name	2222 Moser Ave	0	2018	Existing
No Name	2528 N Fitzhugh Ave	4	2019	Existing
No Name	5020 Bryan St	5	2019	Existing
No Name	5026 Bryan St	5	2019	Existing
No Name	2000 Park Ave	5	2019	Existing
No Name	5206 Fuqua St	6	2019	Existing
No Name	1500 Bennett Ave	14	2019	Existing

#### Market Rate (Built Since 2010 Only)

Property Name	Property Address	Total Units	Year Built	Building Status
Sanctuary 1518	1518 N Carroll St	20	2019	Existing
Cedar Springs Apartments	4503 Cedar Springs Rd	52	2019	Existing
Taylor Lofts*	2101 Taylor St	(12) 60	2019	Existing
Indie Deep Ellum	2900 Canton St	231	2019	Existing
Luxia Swiss Ave	4217 Swiss Ave	253	2019	Existing
4600 Ross	4600 Ross Ave	294	2019	Existing
Amelia At Farmers Market	999 S Harwood St	297	2019	Existing
The Crosby	400 S Hall St	336	2019	Existing
Essence On Maple	2626 Throckmorton St	340	2019	Existing
No Name	Birch Street	1	2020	Existing
No Name	4305 Roseland Ave	2	2020	Existing
No Name	1931 N Prairie Ave	5	2020	Existing
Cedars Court	1910-1920 Park Ave	14	2020	Existing
Lamar Lofts	1403 Corinth Rd	32	2020	Existing
Cityscape Park	1818 Park Ave	68	2020	Existing
The Fitz	1500 N Fitzhugh Ave	70	2020	Existing
The Hamilton	2525 Elm St	310	2020	Existing
West Mockingbird	2223 Hawes Ave	354	2020	Existing
Multifamily Lot In Knox Henderson	4527 Rusk Ave	2	2021	Existing
No Name	4911 Alton Ave	3	2021	Existing
No Name	2006 N Fitzhugh Ave	7	2021	Existing
No Name	2018-2020 Moser Ave	14	2021	Existing
No Name	1515 North Peak St	28	2021	Existing
The Drake At White Rock Lake	7450 Coronado Ave	84	2021	Existing
Cortland Farmers Market	1011 S Harwood St	220	2021	Existing
Ross + Peak	4302 Ross Ave	240	2021	Existing
Lenox Maplewood	5490 Denton Drive Cut Off	287	2021	Existing
East Quarter Residences	300 Pearl St	335	2021	Existing
The Victor	3039 Nowitzki Way	344	2021	Existing
No Name	4514 Cabell Dr	5	2022	Existing
No Name	2026-2030 N Prairie Ave	10	2022	Existing
No Name	3321 Crestview Dr	18	2022	Existing
Magnolia At West Lemmon	3383 Cedarplaza Ln	153	2022	Existing
The Alton	2929 Oak Lawn Ave	293	2022	Existing
Jefferson At Central	999 N Carroll Ave	430	2022	Existing

**Note(s):** Asterisked (\*) properties leverage Public Facility Corporation or TIF financing. Units in parenthesis denote units with rents restricted as part of a financing agreement.

**Source(s):** NHPD, CoStar, HR&A Calculations.

## APPENDIX | LIST OF PROPERTIES: COUNCIL DISTRICT 2 (cont.)

### District: 2

#### Market Rate (Built Since 2010 Only)

Property Name	Property Address	Total Units	Year Built	Building Status
<b>New Properties Since 2010:</b>	127	<b># Units:</b> 22,291		
Jefferson Innova	2781 N Carroll Ave	430	2022	Existing
Lone Star Gas Lofts Atmos (Phase II)*	301 South Harwood Street & 1915 Wood Streets	(63) 123	1931/2022	Existing
No Name	1522 S Good Latimer Expy	285	2024	Final Planning
No Name	4308 Roseland Ave	12	2023	Proposed
Braniff Multifamily	2801 Wycliff Ave	46	2023	Proposed
Kiva East	4724-4806 E Side Ave	87	2023	Proposed
The Central	North Central Expressway & Haskell Ave	350	2023	Proposed
2800 Taylor	2812 Taylor St	192	2024	Proposed
No Name	1718 S Good Latimer Expy	285	2024	Proposed
No Name	3007 Throckmorton St	450	2024	Proposed
Sogood	South Good-Latimer Expressway And Cesar Chavez Blvd	0	2024	Proposed
No Name	2202 Mail Ave	9	2023	Under Construction
No Name	4625-4631 Belmont Ave	10	2023	Under Construction
No Name	4208 Live Oak St	14	2023	Under Construction
No Name	5317 Reiger Ave	15	2023	Under Construction
Capitol Flats	5209 Capitol Ave	60	2023	Under Construction
Aviata West Love	2232 Empire Central Dr	112	2023	Under Construction
The Willow	3800 Willow St	190	2023	Under Construction
Willow	3900 Commerce St	338	2023	Under Construction
Alexan Cathedral Arts	1609 N Garrett Ave	384	2023	Under Construction
Conor Live Oak	4921 Live Oak St	111	2024	Under Construction

**Note(s):** Asterisked (\*) properties leverage Public Facility Corporation or TIF financing. Units in parenthesis denote units with rents restricted as part of a financing agreement.

**Source(s):** NHPD, CoStar, HR&A Calculations.

# APPENDIX | LIST OF PROPERTIES: COUNCIL DISTRICT 3

## District: 3

### Market Rate (Built Since 2010 Only)

Property Name	Property Address	Total Units	Year Built	Building Status
<b>New Properties Since 2010:</b>		<b>10</b>		<b># Units: 1,880</b>
Taylors Farm	1150 Pinnacle Park Blvd	160	2011	Existing
Patriot Ridge	4810 Spur 408 Hwy	192	2012	Existing
No Name	4820 Pachuca Ct	1	2013	Existing
Eagle Crossing	8015 W Camp Wisdom Rd	150	2017	Existing
Clark Ridge Canyon	8200 Clarksprings Dr	248	2019	Existing
Crest At Illinois	4800 W Illinois Ave	147	2020	Existing
Park Hill Apartments	1210 N Cockrell Hill Rd	318	2022	Existing
Cedar Lake Apartments	7455 W Camp Wisdom Rd	198	2023	Under Construction
Dallas National	1531 Duncanville Rd	336	2023	Under Construction

### Affordable (All Units)

Property Name	Property Address	Total Units	Year Funded	Construction Date	Building Status
<b>Total Properties:</b>		<b>23</b>			<b># Units: 5,080</b>
Sphinx At Luxar Villas	3110 S Cockrell Hill Rd	100	2000	No Data	Active
Woodglen Park I	6800 S Cockrell Hill Rd	112	1992	No Data	Active
Barbara Jordan Square	4700 Country Creek Dr	121	2004	No Data	Active
Columbia Luxar Townhomes	3120 Guadalupe Ave	125	1988	No Data	Active
Hillside West Apartments*	3757 Falls Bluff Dr	130	2013	No Data	Active
Eagle Crossing Apartments	8015 W Camp Wisdom Rd	150	2022	No Data	Active
Friendship Tower	3033 S Cockrell Hill Rd	151	1970	1980	Active
Woodhollow	4424 Woodhollow Dr	236	1990	No Data	Active
Fairway Village	526 Cold Town Ln	250	1989	1967	Active
Primrose Oaks	2999 S Hampton Rd	250	1996	No Data	Active
Artisan Ridge	5480 Preakness Ln	264	2007	No Data	Active
Potters House At Primrose	2515 Perryton Dr	280	2007	No Data	Active
Terrace Hills	1130 E Ledbetter Dr	128	1974	No Data	Inactive
Highland Road Village	2704 S Cockrell Hill Rd	180	1972	No Data	Inactive
Village Green-Second Section	4306 Olde Forge Rd	208	1988	No Data	Inactive
Hampton Terrace	5000 S Hampton Rd	244	1971	No Data	Inactive
Rolling Meadows Apartments	4909 Rolling Meadows Dr	289	1967	No Data	Inactive
Parkwoods Apartments	3035 W Pentagon Pkwy	826	2020	No Data	Inactive
Golden Helmet Apartments	2121 52Nd St	74	2017	No Data	Inconclusive
Residence At The Oaks	2740 Duncanville Rd	209	2014	No Data	Inconclusive
Primrose Oaks (Oaks At Hamptons)	2514 Perryton Dr	248	1981	No Data	Inconclusive
Redbird Trails Apartments	3636 W Red Bird Ln	252	1988	No Data	Inconclusive
Rosemont At Bluff Ridge	8125 Clark Rd	253	1900	No Data	Inconclusive

**Note(s):** Asterisked (\*) properties leverage Public Facility Corporation or TIF financing. Units in parenthesis denote units with rents restricted as part of a financing agreement.

**Source(s):** NHPD, CoStar, HR&A Calculations.

# APPENDIX | LIST OF PROPERTIES: COUNCIL DISTRICT 4

## District: 4

### Market Rate (Built Since 2010 Only)

Property Name	Property Address	Total Units	Year Built	Building Status
<b>New Properties Since 2010:</b>		<b>4</b>		<b># Units: 497</b>
Sphinx At Fiji Seniors	201 Fran Way	130	2010	Existing
Lancaster Urban Village*	4417 S Lancaster Rd	(98) 193	2013	Existing
Serenity Place Apartments	3124 S Denley Dr	45	2015	Existing
Sphinx At Fiji Lofts	215 S Corinth St	129	2024	Final Planning

### Affordable (All Units)

Property Name	Property Address	Total Units	Year Funded	Construction Date	Building Status
<b>Total Properties:</b>		<b>27</b>			<b># Units: 3,646</b>
South Boulevard Retirement Center	1811 Savoy St	30	2005	No Data	Active
Serenity Place	3124 S Denley Dr	45	2015	2015	Active
Pythian Manor Apartments	2719 E Illinois Ave	76	2016	1967	Active
Reese Court Villas	1201 S Ewing Ave	80	2000	No Data	Active
Ewing Villas	811 Morrell Ave	80	2001	No Data	Active
Peoples El Shaddai Village	2836 E Overton Rd	100	1998	1967	Active
No Name	1544 E 8Th St	102	1969	No Data	Active
Sphinx At Fiji Senior	201 Fran Way	130	1959	No Data	Active
Rosemont Of Oak Hollow	3015 E Ledbetter Dr	153	2006	No Data	Active
Royal Crest	3558 Wilhurt Ave	168	1989	1967	Active
Madison Point Apartments (Dallas)	220 E Overton Rd	176	1989	No Data	Active
Peoples Saint James	3119 Easter Ave	200	2013	1967	Active
Oakwood Place Apartments	4950 Wadsworth Dr	206	1996	No Data	Active
Five Mile Creek	5151 Village Fair Dr	236	2013	No Data	Active
Rosemont At Cedar Crest	3303 Southern Oaks Blvd	256	2013	2003	Active
No Name	3038 Fernwood Ave	1	2011	No Data	Inactive
Queens Court Apartments	3425 S Polk St	56	1989	No Data	Inactive
Kings Castle Apartments	3625 Legendary Ln	66	2020	No Data	Inactive
Trails The	2621 Southerland Ave	100	1971	No Data	Inactive
Southcrest	3702 Conway St	150	2022	No Data	Inactive
Fawn Ridge Village Apartments West	3529 Fawn Valley Dr	200	1973	No Data	Inactive
Gabriel Gardens Apartments	2805 E Ledbetter Dr	201	1988	No Data	Inactive
Sunrise Village	4836 Sunnyvale St	35	1973	No Data	Inconclusive
Oasis Park Apartments	3035 E Ledbetter Dr	166	2007	No Data	Inconclusive
Oasis Apartments	2755 E Ledbetter Dr	187	2007	No Data	Inconclusive
Spring Ridge	3604 Legendary Ln	196	1991	No Data	Inconclusive
Cedar Glen Apartments	2906 E Kiest Blvd	250	1999	No Data	Inconclusive

**Note(s):** Asterisked (\*) properties leverage Public Facility Corporation or TIF financing. Units in parenthesis denote units with rents restricted as part of a financing agreement.

**Source(s):** NHPD, CoStar, HR&A Calculations.

# APPENDIX | LIST OF PROPERTIES: COUNCIL DISTRICT 5

## District: 5

### Market Rate (Built Since 2010 Only)

<b>New Properties Since 2010:</b>	0	<b># Units:</b>	0
<b>Property Name</b>	<b>Property Address</b>	<b>Total Units</b>	<b>Year Built</b>
	No New Development		

### Affordable (All Units)

<b>Total Properties</b>	13	<b># Units</b>	1,404		
<b>Property Name</b>	<b>Property Address</b>	<b>Total Units</b>	<b>Year Funded</b>	<b>Construction Date</b>	<b>Building Status</b>
Pleasant Oaks Phase Iv	8534 Bearden Ln	3	1973	No Data	Active
Pleasant Oaks Phase Iii	8518 Bearden Ln	5	1970	No Data	Active
Pleasant Oaks Phase Iv	8517 Bearden Ln	7	2019	No Data	Active
Umphress Terrace	7242 Umphress Rd	54	2013	2007	Active
Mirasol Apartments	1226 N Masters Dr	100	2017	1973	Active
Scattered Sites	2008 Conner Dr	125	2004	No Data	Active
Crawford Park	1180 N Masters Dr	144	1996	No Data	Active
Forest Grove	10203 Budtime Ln	85	1990	No Data	Inactive
Prairie Creek Manor	1190 N Prairie Creek Rd	144	1974	No Data	Inactive
Spruce Square	442 S Saint Augustine Dr	160	1974	No Data	Inactive
Regis Square Apartment	1355 N Jim Miller Rd	175	1994	No Data	Inactive
Saint Augustine Apartments	1198 N Saint Augustine Dr	200	1972	No Data	Inactive
Pleasant Grove Village	7040 Moondale Ln	202	1965	No Data	Inactive

**Note(s):** Asterisked (\*) properties leverage Public Facility Corporation or TIF financing. Units in parenthesis denote units with rents restricted as part of a financing agreement.

**Source(s):** NHPD, CoStar, HR&A Calculations.

# APPENDIX | LIST OF PROPERTIES: COUNCIL DISTRICT 6

## District: 6

### Market Rate (Built Since 2010 Only)

New Properties Since 2010:		31	# Units:	9,638
Property Name	Property Address	Total Units	Year Built	Building Status
Aml Design District	1400 Hi Line Dr	314	2012	Existing
Avant On Market Center	1955 Market Center Blvd	301	2013	Existing
The Lofts At Sylvan Thirty*	1818 Sylvan Ave	(40) 201	2014	Existing
Yorktown Luxury Apartments	660 Yorktown St	226	2015	Existing
Yorktown Luxury A				
Pike West Commerce	444 W Commerce St	252	2015	Existing
Factory Design District*	120 Turtle Creek Blvd	(62) 309	2016	Existing
Sync West Dallas	604 Fort Worth Ave	340	2016	Existing
Ltd West Commerce	305 W Commerce St	308	2017	Existing
Austin At Trinity Green	1212 Singleton Blvd	355	2017	Existing
Abstract At Design District	1931 Market Center Blvd	400	2017	Existing
Cypress At Trinity Groves*	320 Singleton Blvd	(71) 649	2017	Existing
Magnolia Off Sylvan	707 Seale St	60	2018	Existing
Los Altos Trinity Green	990 Singleton Blvd	324	2019	Existing
The Langford	200 W Commerce St	315	2020	Existing
No Name	1710 Morris St	1	2021	Existing
Westerly	411 W Commerce St	331	2021	Existing
Dallas Stemmons Apartments	2440 Southwell Rd	87	2022	Existing
Urby Dallas	1930 Hi Line Dr	383	2022	Existing
Parsons Green I and II*	3451 Chapel Oaks	(41) 206	1931	Existing
Cypress Waters Phase I*	3155 Chapel Oaks Dr, 3211 Scotch Creek Rd, 9240 Cypress Waters Boulevard	(122) 608	2013	Existing
Cabana Hotel Residential Tower	899 N Stemmons Fwy	100	2023	Proposed
Jmj Tower Apartments	N Riverfront Blvd	250	2023	Proposed
No Name	Fort Worth Ave	146	2024	Proposed
Ilume Design District	1650 Oak Lawn Ave	213	2024	Proposed
No Name	1600 Singleton Blvd	1200	2024	Proposed
No Name	505 N Riverfront Blvd	535	2025	Proposed
Mariposa Apartment Homes At Western Heights	1641 N Windomere	130	2023	Under Construction
Kessler Bluffs	1000 Fort Worth Ave	146	2023	Under Construction
No Name	2350 N Beckley Ave	280	2023	Under Construction
Cypress At Trinity Grove Iii	626 Singleton Blvd	368	2023	Under Construction
The Standard At Royal Lanes	2737 Royal Ln	300	2024	Under Construction

### Affordable (All Units)

Total Properties		19	# Units	3,707	
Property Name	Property Address	Total Units	Year Funded	Construction Date	Building Status
Boh-Topletz Ii	3347 Canada Dr	1	2008	No Data	Active
Mabel Meshack White Manor	3260 Bickers St	65	2022	2001	Active
Lakeridge Apartments	2510 Community Dr	66	1989	No Data	Active
Dallas Stemmons Apartments	11070 N Stemmons Fwy	87	2019	No Data	Active
Rosemont At Lakewest (Arbor Woods)	3000 N Hampton Rd	151	1988	No Data	Active
Cornerstone Chase Apartments	3120 Valley Meadow Dr	166	1952	No Data	Active
Village At Lakewest Apartments Ii	2680 Bickers St	180	1969	2009	Active
Village At Lakewest Apartments I	2696 Bickers St	183	1983	2009	Active
Churchill At Pinnacle Park	1411 N Cockrell Hill Rd	200	2003	No Data	Active
Sierra Vista Apartments	2775 Northaven Rd	224	2021	No Data	Active
Colonia Tepeyac Apartments	5880 Bernal Dr	280	1998	1969	Active
Trails Redevelopment (Dallas)	3109 Chapel Creek Dr	302	1991	No Data	Active
Hamptons At Lakewest	2425 Bickers St	775	1999	2004	Active
Chapel Creek	3410 Hidalgo Dr	192	2016	No Data	Inactive
Forest Dale Inc	11851 High Dale Dr	206	1998	1965	Inactive
Royal Lane	2032 Royal Ln	320	1969	No Data	Inactive
Starlight Apartments	9709 Starlight Rd	71	1989	No Data	Inconclusive
Manor On The Park	3122 Park Ln	86	1970	No Data	Inconclusive
Lakeview Townhomes	3020 Bickers St	152	2016	No Data	Inconclusive

**Note(s):** Asterisked (\*) properties leverage Public Facility Corporation or TIF financing. Units in parenthesis denote units with rents restricted as part of a financing agreement.

**Source(s):** NHPD, CoStar, HR&A Calculations.

# APPENDIX | LIST OF PROPERTIES: COUNCIL DISTRICT 7

## District: 7

### Market Rate (Built Since 2010 Only)

Property Name	Property Address	Total Units	Year Built	Building Status
<b>New Properties Since 2010:</b>		<b># Units:</b> 1,026		
Crestshire Village	2314 N Saint Augustine Dr	74	2010	Existing
Carpenters Point	4645 Dolphin Rd	150	2010	Existing
Buckeye Trails Commons	6714 Bexar St	323	2013	Existing
<i>No Name</i>	3221 Elihu St	38	2016	Existing
Sterlingshire	9415 Bruton Rd	264	2016	Existing
<i>No Name</i>	2430 Highland Rd	7	2018	Existing
<i>Serenity At Dallas</i>	3305 Dilido Rd	170	2021	<i>Under Renovation</i>

### Affordable (All Units)

Property Name	Property Address	Total Units	Year Funded	Construction Date	Building Status
<b>Total Properties</b>		<b>60</b>		<b># Units</b> 6,443	
Dolphin Heights Project	3415 Detonte St	1	2011	No Data	Active
Coleman Homes Project	1319 Coleman Ave	2	1978	No Data	Active
<i>No Name</i>	2432 Macon St	2	2018	No Data	Active
Cornerstone-Ervay Home Project	1841 South Blvd	3	2005	No Data	Active
Southfair-Fair Park Estates Phase Ii	2823 Thomas Tolbert Blvd	6	2006	No Data	Active
Fair Park Estates Phase Iv	2811 Thomas Tolbert Blvd	6	2010	No Data	Active
Fair Park Estates Phase V	2816 Park Row Ave	6	1969	No Data	Active
Fhndc-Elder Friendly Project	1324 Cooper St	6	2011	No Data	Active
<i>No Name</i>	5208 Bexar St	7	2010	No Data	Active
Frazier Court Sdfp	4826 Spring Ave	9	2000	No Data	Active
Fair Park Estates Phase I & Ii	2828 Thomas Tolbert Blvd	9	1999	No Data	Active
Hai-Tak'S 5203 Bexar Street Project	5203 Bexar St	9	2014	No Data	Active
Elderfriendly Ii	1425 Cooper St	10	2002	No Data	Active
Frazier Phase Ii	4810 Spring Ave	11	2010	No Data	Active
Aya Senior Village	2607 Jeffries St	30	2022	2000	Active
Greater Bethlehem Plaza	7835 Military Pkwy	30	1998	1988	Active
<i>No Name</i>	1621 S Malcolm X Blvd	43	2016	2016	Active
Prairie Commons	9850 Military Pkwy	72	2001	No Data	Active
Crestshire Village	2314 N St Augustine Dr	74	1941	No Data	Active
Eban Village Apartments	2929 Park Row Ave	110	1940	No Data	Active
Buckeye Trail Commons Ii	6717 Bexar St	116	2012	No Data	Active
Frazier Fellowship	4848 Elsie Faye Heggins St	116	2015	No Data	Active
Prairie Creek Village Apartments	9215 Bruton Rd	120	2011	1981	Active
St Augustine Estates	2222 N Saint Augustine Dr	150	1998	No Data	Active
Carpenter'S Point	4645 Dolphin Rd	150	1961	2010	Active
Shiloh Village Apartments	8702 Shiloh Rd	168	1994	1977	Active
Lakeland Manor	3105 Peavy Rd	172	1998	1978	Active
Treymore Eastfield	2631 John West Rd	196	1997	No Data	Active
Park Manor	3333 Edgewood St	196	1994	No Data	Active
Sphinx At Delafield Villas	4101 Delafield Ln	205	1996	No Data	Active
Buckeye Trail Commons	6707 Buckeye Cmns	207	2010	No Data	Active
Buckeye I	6655 Buckeye Cmns	207	2013	2013	Active
Eban Village Ii	3011 Park Row Ave	220	1996	No Data	Active
Rosemont At Sierra Vista (Scyene)	9901 Scyene Rd	250	1998	No Data	Active
Rosemont At Meadow Lane	4722 Meadow St	264	2002	2004	Active
Sterlingshire Apartment Homes	9415 Bruton Rd	264	2020	No Data	Active

**Note(s):** Asterisked (\*) properties leverage Public Facility Corporation or TIF financing. Units in parenthesis denote units with rents restricted as part of a financing agreement.

**Source(s):** NHPD, CoStar, HR&A Calculations.

## APPENDIX | LIST OF PROPERTIES: COUNCIL DISTRICT 7 (cont.)

### District: 7

#### Affordable (All Units)

Property Name	Property Address	Total Units	Year Funded	Construction Date	Building Status
<b>Total Properties</b>	60	<b># Units</b>	6,443		
Skyline Apartments	3402 N Buckner Blvd	272	1974	No Data	Active
Rosemont At Ash Creek	2605 John West Rd	278	2012	2004	Active
Rosemont At Ask Creek	2563 John W Rd	280	2007	No Data	Active
Wahoo Frazier	4838 Elsie Faye Heggins St	316	1974	2006	Active
Skyline Place Apartments	4700 Wimbledon Way	318	2017	No Data	Active
No Name	1405 Peabody Ave	1	1900	No Data	Inactive
No Name	2636 Lawrence St	1	1969	No Data	Inactive
Southfair Cdc Predev	2648 Meyers St	1	1968	No Data	Inactive
No Name	2728 Aspen Dr	1	1969	No Data	Inactive
No Name	2900 Valentine St	1	2012	No Data	Inactive
Meadows Project Ii	3500 Meadow St	1	2009	No Data	Inactive
South Blvd Apartments	2932 South Blvd	4	2003	No Data	Inactive
Receivership Icdc	2634 Burger Ave	6	2007	No Data	Inactive
Operation Relief	1803 Al Lipscomb Way	10	2004	No Data	Inactive
Normandy Place Apartments	1825 Park Row Ave	18	2007	No Data	Inactive
Bluebonnet I	8221 Scyene Rd	50	1980	No Data	Inactive
Glenn Jh	4001 Malcolm X Blvd	55	1965	No Data	Inactive
No Name	2710 Jeffries St	110	1966	No Data	Inactive
Timber Park Apartments	2714 N Buckner Blvd	158	1994	No Data	Inactive
Prince Hall Chambre Apartments	3650 Dixon Ave	192	1973	No Data	Inactive
St Francis Apartments	8943 Senate St	200	1983	No Data	Inactive
Bruton Oaks Apartments	9901 Bruton Rd	304	1967	No Data	Inactive
Southdale Apartments	3727 Dixon Ave	187	2000	No Data	Inconclusive
Primrose At Park Villas	2519 John West Rd	232	2014	No Data	Inconclusive

**Note(s):** Asterisked (\*) properties leverage Public Facility Corporation or TIF financing. Units in parenthesis denote units with rents restricted as part of a financing agreement.

**Source(s):** NHPD, CoStar, HR&A Calculations.

# APPENDIX | LIST OF PROPERTIES: COUNCIL DISTRICT 8

## District: 8

### Market Rate (Built Since 2010 Only)

Property Name	Property Address	Total Units	Year Built	Building Status
<b>New Properties Since 2010:</b>		<b>8</b>		
		<b># Units:</b>	<b>1,385</b>	
Shady Creek	15250 Kleberg Rd	95	2010	Existing
Magnolia Trace	2111 Crouch Rd	112	2011	Existing
Ridgecrest Mhc	733 Cliffview Dr	210	2013	Existing
Palladium Redbird	7202 Sw Moreland Rd	300	2021	Existing
No Name	3100 Persimmon Rd	0	2024	Proposed
The Vues Apartments	4102 Preferred Pl	98	2023	Under Construction
Palladium Simpson Stuart	3440 Stuart Simpson Rd	270	2023	Under Construction
The Ridge At Lancaster	2101 Crouch Rd	300	2023	Under Construction

### Affordable (All Units)

Property Name	Property Address	Total Units	Year Funded	Construction Date	Building Status
<b>Total Properties</b>		<b>32</b>			
		<b># Units</b>	<b>6,442</b>		
Cliff View Village Three	2628 Simpson Stuart Rd	27	2022	2003	Active
Cliff View Village Ii	2425 Simpson Stuart Rd	27	2022	2003	Active
Cliff View Village	2424 Simpson Stuart Rd	28	2000	1995	Active
Hacienda Del Sol	1207 Galicia Ln	55	1941	No Data	Active
Beckley Townhomes	801 Beckleymeade Ave	100	2006	No Data	Active
Magnolia Trace	6712 Patrol Way	112	1999	No Data	Active
Cherokee Village Ii Apartments	7204 Elam Rd	150	1981	1969	Active
The Homes Of Persimmons	3100 Persimmon Rd	180	1995	No Data	Active
Cedar Ridge Apartments - Dallas	7905 Marvin D Love Fwy	192	1984	No Data	Active
Creekside Apartments	378 S Jim Miller Rd	200	2014	1966	Active
West Virginia Park Apartments	8004 W Virginia Dr	204	2003	No Data	Active
Las Lomas Apartments	6161 Trail Glen Dr	230	1994	2002	Active
Ridge At Trinity Apartments	7203 Great Trinity Forest Way	232	2000	1968	Active
Rosemont At Pemberton Hill	220 Stoneport Dr	236	2006	2002	Active
Sphinx At Murdeaux	125 N Murdeaux Ln	240	2002	No Data	Active
Villas Of Sorrento	3130 Stag Rd	245	1995	No Data	Active
Rosemont At Mission Trails (Laureland)	330 E Camp Wisdom Rd	249	2006	2006	Active
Greens Of Hickory Trail	8613 Old Hickory Trl	250	1995	No Data	Active
Highland Hills	3131 Simpson Stuart Rd	250	2014	No Data	Active
Park At Cliff Creek	7310 Marvin D Love Fwy	280	1970	No Data	Active
Providence On The Park	8501 Old Hickory Trl	280	2002	No Data	Active
Estelle Village	5969 Highland Village Dr	291	2014	1992	Active
Palladium Redbird	7202 S Westmoreland Rd	300	2016	No Data	Active
Willoughby Park Apartments	8328 Willoughby Blvd	148	2002	No Data	Inactive
Southport Ii	8502 Willoughby Blvd	148	1972	No Data	Inactive
Oak Hollow Apartments	444 Oak Hollow Dr	160	1971	No Data	Inactive
Leigh Ann	7938 Leigh Ann Dr	256	1964	No Data	Inactive
Operation Relief Center	202 S Jim Miller Rd	300	2003	No Data	Inactive
Surrey Row	7272 Marvin D Love Fwy	359	1970	No Data	Inactive
Rosemont At Hickory Trace	8410 S Westmoreland Rd	180	2014	No Data	Inconclusive
Grove Village	7209 Great Trinity Forest Way	229	2016	No Data	Inconclusive
Field Stone Crossing Llc	5821 Bonnie View Rd	304	1972	No Data	Inconclusive

**Note(s):** Asterisked (\*) properties leverage Public Facility Corporation or TIF financing. Units in parenthesis denote units with rents restricted as part of a financing agreement.

**Source(s):** NHPD, CoStar, HR&A Calculations.

# APPENDIX | LIST OF PROPERTIES: COUNCIL DISTRICT 9

## District: 9

### Market Rate (Built Since 2010 Only)

Property Name	Property Address	Total Units	Year Built	Building Status
<b>New Properties Since 2010:</b>		<b>6</b>		<b># Units: 1,106</b>
The Parc At White Rock	7545 E Northwest Hwy	290	2016	Existing
White Rock Crossing	730 Rainwater Rd	17	2021	Existing
The Estates At Shiloh	10725 Shiloh Rd	264	2021	Existing
Doverhouse	9343 Garland Rd	219	2022	Existing
<i>The Oaks</i>	<i>11346 Fernald Ave</i>	<i>260</i>	<i>2023</i>	<i>Under Construction</i>
<i>Eastlake</i>	<i>10030 Garland Rd</i>	<i>56</i>	<i>2024</i>	<i>Under Construction</i>

### Affordable (All Units)

Property Name	Property Address	Total Units	Year Funded	Construction Date	Building Status
<b>Total Properties</b>		<b>14</b>			<b># Units: 2,202</b>
Heroes House	2122 Highland Rd	24	1993	No Data	Active
Juliette Fowler Residences	Nec Of S Fulton St & E Side St	144	2021	No Data	Active
Primrose At Highland Meadows	2100 Highland Rd	150	1998	No Data	Active
Silver Gardens Apartments	2620 Ruidosa Ave	202	2001	1979	Active
Enchanted Hills	7802 Villa Cliff Dr	229	1997	No Data	Active
Estates At Shiloh	2649 Centerville Rd	264	2020	No Data	Active
Willow Pond Apartments	6003 Abrams Rd	386	2002	No Data	Active
Flora Street Lofts	2121 N Farola Dr	47	2014	No Data	Inactive
Alpine Hamlet	2165 Highland Rd	50	1975	No Data	Inactive
Spring Gardens Apartments	7803 Ferguson Rd	60	1970	No Data	Inactive
Rosewood Apartments	2229 Highland Rd	88	1989	No Data	Inactive
El Capitan Apartments	1842 El Capitan Dr	150	1972	No Data	Inactive
White Rock Creek Apartments	1041 Knob Oak Dr	152	1981	No Data	Inactive
Easton Terrace li	10429 Lone Tree Ln	256	1974	No Data	Inactive

**Note(s):** Asterisked (\*) properties leverage Public Facility Corporation or TIF financing. Units in parenthesis denote units with rents restricted as part of a financing agreement.

**Source(s):** NHPD, CoStar, HR&A Calculations.

# APPENDIX | LIST OF PROPERTIES: COUNCIL DISTRICT 10

## District: 10

### Market Rate (Built Since 2010 Only)

Property Name	Property Address	Total Units	Year Built	Building Status
<b>New Properties Since 2010:</b>		<b>9</b>	<b># Units: 2,218</b>	
Haven Lake Highlands*	7077 Watercrest Pky	(40) 200	2014	Existing
Century Lake Highlands	6808 Skillman St	362	2015	Existing
Infinity On The Point	8997 Vantage Point Dr	249	2016	Existing
The Callie	8025 Forest Ln	261	2016	Existing
Lookout Apartments	9330 Lookout Point	259	2018	Existing
Shoreview Flats	10151 Shoreview Rd	235	2020	Existing
Metropolitan Living	103 Forest Star Dr	49	2021	Existing
No Name	9202 Markville Dr	200	2023	Proposed
Lenox Lake Highlands	9371 Whistle Stop Pl	403	2023	Under Construction

### Affordable (All Units)

Property Name	Property Address	Total Units	Year Funded	Construction Date	Building Status
<b>Total Properties</b>		<b>11</b>	<b># Units 2,121</b>		
Audelia Manor	10025 Shoreview Rd	123	2004	No Data	Active
Northgate Village Apartments	12303 Plano Rd	168	1998	1978	Active
Hidden Ridge	9702 W Ferris Branch Blvd	228	2004	1984	Active
Forest Green Manor	9730 Shepherd Rd	252	2003	1976	Active
North Creek Apartments	9387 Pinyon Tree Ln	158	1990	No Data	Inactive
Brookview Apartments Homes	8303 Skillman St	160	1992	No Data	Inactive
Park Forest Apartments	11907 Greenville Ave	200	1979	No Data	Inactive
Sterling Crest Village Apartments	11606 Oakshire Pl	230	1978	No Data	Inactive
Forest Gardens Apartments	12203 Plano Rd	232	1996	No Data	Inactive
Northwest Terrace	8501 Lullwater Dr	288	1972	No Data	Inactive
Autumn Creek	10765 E Northwest Hwy	82	2022	No Data	Inconclusive

**Note(s):** Asterisked (\*) properties leverage Public Facility Corporation or TIF financing. Units in parenthesis denote units with rents restricted as part of a financing agreement.

**Source(s):** NHPD, CoStar, HR&A Calculations.

# APPENDIX | LIST OF PROPERTIES: COUNCIL DISTRICT 11

## District: 11

### Market Rate (Built Since 2010 Only)

New Properties Since 2010:		21	# Units: 4,895	
Property Name	Property Address	Total Units	Year Built	Building Status
Vv&M	5225 Verde Valley Ln	310	2014	Existing
Berkshire Amber	5519 Arapaho Rd	322	2015	Existing
Crest At Park Central	7929 Churchill Way	387	2015	Existing
Park Fountains At Preston Hollow	10011 N Central Expy	30	2016	Existing
Summit Parque	12777 Merit Dr	100	2016	Existing
Broadstone 51/51	5151 Bent Tree Forest Dr	245	2016	Existing
Berkshire Auburn	5515 Arapaho Rd	278	2016	Existing
The Briscoe	12639 Coit Rd	322	2016	Existing
Windsor By The Galleria	13290 Noel Rd	321	2017	Existing
Preston Hollow Village Apartments	7825 Firefall Way	526	2017	Existing
Imt Prestonwood	15480 Dallas Pky	438	2018	Existing
Cornell Midtown	13001 Cornell Dr	344	2019	Existing
Muse At Midtown	13675 Noel Rd	289	2020	Existing
Trellis North Dallas	16060 Dallas Pky	131	2022	Existing
No Name	Nec Noel Rd & I-635	0	2023	Proposed
No Name	5304 Alpha Rd	0	2024	Proposed
Magnolia Galleria North	13725 Montfort Dr	101	2023	Under Construction
Hazel By The Galleria	13270 Noel Rd	398	2023	Under Construction
Avia Apartments	7888 Alpha Rd	114	2024	Under Construction
Alexan Apartments	Noel Rd	239	2024	Under Construction
No Name	5525 Lyndon B Johnson Fwy	0	2022	Abandoned

### Affordable (All Units)

Total Properties		10	# Units 1,598		
Property Name	Property Address	Total Units	Year Funded	Construction Date	Building Status
Iris Place	13321 Emily Rd	18	2022	1997	Active
Summit Parque	12777 Merit Dr	100	2004	No Data	Active
Peterson Place Apartments	5423 Peterson Ln	168	2007	No Data	Active
Tuscany At Goldmark	13731 Goldmark Dr	184	1988	No Data	Active
Dallas North Apartments	5557 Alpha Rd	206	1966	No Data	Active
Waterford At Goldmark	13695 Goldmark Dr	220	1995	No Data	Active
Meadowcreek Apartments	14000 Esperanza Rd	71	1981	No Data	Inactive
Amber Dawn Apartments	8542 Spring Valley Rd	157	1990	No Data	Inactive
Woodside Terrace Apartments	14018 Brookgreen Dr	230	2022	No Data	Inactive
Midpark Crossing	13750 Esperanza Rd	244	1971	No Data	Inconclusive

**Note(s):** Asterisked (\*) properties leverage Public Facility Corporation or TIF financing. Units in parenthesis denote units with rents restricted as part of a financing agreement.

**Source(s):** NHPD, CoStar, HR&A Calculations.

## APPENDIX | LIST OF PROPERTIES: COUNCIL DISTRICT 12

### District: 12

#### Market Rate (Built Since 2010 Only)

<b>New Properties Since 2010:</b>	2	<b># Units:</b>	869	
<b>Property Name</b>	<b>Property Address</b>	<b>Total Units</b>	<b>Year Built</b>	<b>Building Status</b>
Gramercy On The Park	4755 Gramercy Oaks Dr	535	2010	Existing
Lyle	17727 Addison Rd	334	2024	Under Construction

#### Affordable (All Units)

<b>Total Properties:</b>	1	<b># Units:</b>	135		
<b>Property Name</b>	<b>Property Address</b>	<b>Total Units</b>	<b>Year Funded</b>	<b>Construction Date</b>	<b>Building Status</b>
Frankford Townhomes	6907 Pebble Beach Dr	135	2004	2008	Active

**Note(s):** Asterisked (\*) properties leverage Public Facility Corporation or TIF financing. Units in parenthesis denote units with rents restricted as part of a financing agreement.

**Source(s):** NHPD, CoStar, HR&A Calculations.

# APPENDIX | LIST OF PROPERTIES: COUNCIL DISTRICT 13

## District: 13

### Market Rate (Built Since 2010 Only)

New Properties Since 2010:		18	# Units: 4,296	
Property Name	Property Address	Total Units	Year Built	Building Status
Parks Edge	4554 Glenwick Ln	41	2012	Existing
Magnolia Off Eastern	7518 Eastern Ave	21	2016	Existing
Magnolia Off Inwood	7606 Eastern Ave	38	2016	Existing
Bandera At Preston Hollow	6848 Bandera Ave	180	2016	Existing
Domain At Midtown Park	8169 Midtown Blvd	395	2016	Existing
Modena	8275 Walnut Hill Ln	230	2017	Existing
The Galleries At Park Lane Apartments	8110 Park Ln	246	2017	Existing
The Mark At Midtown Park	10550 N Central Expy	274	2017	Existing
The Nash	8213 Meadow Rd	302	2017	Existing
Everra Midtown Park	8250 Meadow Rd	422	2017	Existing
The Laurel Preston Hollow	8600 Preston Rd	159	2018	Existing
Elan Inwood	12001 Inwood Rd	180	2019	Existing
Everleigh Forestwood	11881 Inwood Rd	191	2019	Existing
Bluffs At Midway Hollow	3900 W Northwest Hwy	473	2019	Existing
Legacy Midtown Park	8240 Manderville Ln	184	2021	Existing
Luxia Midtown Park	8107 Manderville Ln	307	2021	Existing
Preston Center Apartments	Westchester Dr	300	2024	Proposed
No Name	U.S. 75 & Meadow Rd	353	2024	Proposed

### Affordable (All Units)

Total Properties:		10	# Units: 1,568		
Property Name	Property Address	Total Units	Year Funded	Construction Date	Building Status
No Name	8320 Park Ln	36		1968	Active
St Jude Place	2920 Forest Ln	104		2015	Active
Le Baron Arms Apartments	6466 Ridgecrest Rd	88		1972	Inactive
Crestridge Apartments	6417 Ridgecrest Rd	110		1973	Inactive
Melody Place Apartments	6852 Shadybrook Ln	192		1972	Inactive
Northaven Terrace	2800 Northaven Rd	208		1966	Inactive
Cross Creek Apartments	6033 E Northwest Hwy	264		1982	Inactive
Melody Village Apartments	5929 Melody Ln	271		1989	Inactive
Santa Fe Trails	6318 Ridgecrest Rd	88		2004	Inconclusive
Junction Apartments	7111 Fair Oaks	207		2004	Inconclusive

**Note(s):** Asterisked (\*) properties leverage Public Facility Corporation or TIF financing. Units in parenthesis denote units with rents restricted as part of a financing agreement.

**Source(s):** NHPD, CoStar, HR&A Calculations.

# APPENDIX | LIST OF PROPERTIES: COUNCIL DISTRICT 14

## District: 14

### Market Rate (Built Since 2010 Only)

New Properties Since 2010:		# Units:	25,653		
Property Name	Property Address	Total Units	Year Built	Building Status	
<i>Ltd Edition 2505</i>	2505 Turtle Creek Blvd	60	2024	Abandoned	
Residences Of Oram	6133 Oram St	15	2010	Existing	
Maa Katy Trail	3223 Lemmon Ave	227	2010	Existing	
The Arts Apartments	2611 Ross Ave	228	2010	Existing	
City Walk	511 N Akard St	337	2010	Existing	
<i>No Name</i>	5918 Ross Ave	12	2011	Existing	
The Standard	5920 E University Blvd	281	2011	Existing	
400 North Ervay	400 N Ervay St	78	2012	Existing	
Lone Star Gas Lofts	300 S Saint Paul St	(107) 229	2012	Existing	
Alara Uptown	2990 Blackburn St	294	2012	Existing	
Gables Uptown Trail	2525 Carlisle St	334	2012	Existing	
The Icon At Ross	1707 N Hall St	372	2012	Existing	
Mockingbird Flats	5600 Smu Blvd	417	2012	Existing	
Manett Townhomes	5017 Manett St	6	2013	Existing	
Ross At Live Oak Townhomes	6051 Ross Ave	6	2013	Existing	
<i>No Name</i>	5021 Manett St	11	2013	Existing	
Renaissance Oaks	3737 Munger Ave	85	2013	Existing	
Monaco On The Trail	3003 Carlisle St	192	2013	Existing	
The Tradition - Lovers Lane	5850 E Lovers Ln	202	2013	Existing	
The Continental*	1810-1812 Commerce St	(41) 203	2013	Existing	
Belmont Village Senior Living At Turtle Creek	3535 N Hall St	250	2013	Existing	
L2 Uptown	2828 Lemmon Ave	321	2013	Existing	
Upper East Side	8749 Southwestern Blvd	322	2013	Existing	
Veranda 2	3100 Ross Ave	26	2014	Existing	
Live Oaks At The Branch	4670 Amesbury Dr	197	2014	Existing	
Bell Knox District	3030 Hester Ave	208	2014	Existing	
Park West	3109 Douglas Ave	240	2014	Existing	
Cantabria At Turtle Creek	2728 Hood St	249	2014	Existing	
The Taylor	3100 Carlisle St	308	2014	Existing	
Landmark On Lovers	5201 Amesbury Dr	336	2014	Existing	
Gallery At Turtle Creek	3427 Cedar Springs Rd	352	2014	Existing	
3700M	3700 McKinney Ave	381	2014	Existing	
Magnolia On Matilda	1965 Matilda St	43	2015	Existing	
The Gentry On M Streets	3736 Glencoe St	180	2015	Existing	
LTV Tower Apartments	1555 Elm St	(19) 187	2015	Existing	
Bell Katy Trail	3033 Routh St	208	2015	Existing	

**Note(s):** Asterisked (\*) properties leverage Public Facility Corporation or TIF financing. Units in parenthesis denote units with rents restricted as part of a financing agreement.

**Source(s):** NHPD, CoStar, HR&A Calculations.

### Affordable (All Units)

Total Properties:		# Units::	1,599		
Property Name	Property Address	Total Units	Year Funded	Construction Date	Building Status
Cwcdc-Gaston Avenue Project	5650 Gaston Ave	12	2012	1959	Active
Bryan Place Apartments	3219 San Jacinto St	22	1995	No Data	Active
Roseland Gardens*	2255 N Washington Ave	100	1980	1980	Active
Little Mexico Village	3027 Harry Hines Blvd	102	1942	No Data	Active
Renaissance Oaks_Scattered Sites li	3737 Munger Ave	105	2013	2013	Active
Fowler Christian Apartments li	105 Juliette Fowler St	145	1982	1979	Active
Dickinson Place Apartments	911 Saint Joseph St	166	1972	1969	Active
Treymore At Cityplace Apartmen	2101 N Haskell Ave	180	1997	No Data	Active
Roseland Estates	1949 N Washington Ave	189	2001	No Data	Active
City Walk At Akard	511 N Akard St	198	1953	1953	Active
2400 Bryan	2400 Bryan St	212	2021	No Data	Active
<i>El Centro Way</i>	<i>El Centro Way</i>	2	1989	No Data	Inactive
<i>Cdcdc-Chdo</i>	<i>5444 Gaston Ave</i>	10	2006	No Data	Inactive
<i>Royal Palm</i>	<i>5520 Gaston Ave</i>	23	1991	No Data	Inconclusive
<i>Lakewood Gardens</i>	<i>5909 Gaston Ave</i>	45	1991	No Data	Inconclusive
<i>Fitzhugh Place Apartments</i>	<i>1428 N Fitzhugh</i>	52	1991	No Data	Inconclusive

# APPENDIX | LIST OF PROPERTIES: COUNCIL DISTRICT 14

## District: 14

### Market Rate (Built Since 2010 Only)

New Properties Since 2010:		# Units:	25,653		
Property Name	Property Address	Total Units	Year Built	Building Status	
Gables McKinney Ave	2500 McKinney Ave	234	2015	Existing	
The Brady	2728 Cedar Springs Rd	299	2015	Existing	
Teak At The Branch	4601 Amesbury Dr	316	2015	Existing	
Skyhouse Dallas	2320 N Houston St	336	2015	Existing	
Macallan On Ross	3501 Ross Ave	368	2015	Existing	
Oak & Ellum	2627 Live Oak St	424	2015	Existing	
Magnolia On Gilbert	4020 Gilbert Ave	31	2016	Existing	
One Oak Grove	3411 Oak Grove Ave	149	2016	Existing	
Armstrong At Knox	4525 Cole Ave	165	2016	Existing	
Uptown @ Cole Park	3030 Elizabeth St	179	2016	Existing	
Miro	2225 N Harwood St	180	2016	Existing	
Knox Heights Apartments	4646 McKinney Ave	182	2016	Existing	
Lyra On McKinney	4209 McKinney Ave	190	2016	Existing	
Stella	2112 Boll St	210	2016	Existing	
The Jordan	2355 Thomas Ave	212	2016	Existing	
The Mayflower Dallas	411 N Akard St	(43) 215	2016	Existing	
555 Ross*	1777 N Record St	(28) 267	2016	Existing	
Cityvu 18	4303 Cole Ave	18	2017	Existing	
Haus 2828	2828 Woodside St	94	2017	Existing	
Magnolia At Lakewood	2175 Tucker St	105	2017	Existing	
1900 Pacific Residences*	1900 Pacific Ave	(15) 150	2017	Existing	
One Uptown	2619 McKinney Ave	196	2017	Existing	
The Katy	4719 Cole Ave	215	2017	Existing	
Statler Residences*	1919 Jackson St	(22) 219	2017	Existing	
Cortland M-Line	3200 McKinney Ave	261	2017	Existing	
The Ash At The Branch	4646 Amesbury Dr	402	2017	Existing	
Camden Greenville	5065 Amesbury Dr	558	2017	Existing	
The Summit On Abbott	4201 Abbott Ave	4	2018	Existing	
Routh Street Condos	3522 Routh St	6	2018	Existing	
Mid Elm Lofts*	1518 Elm St	(3) 35	2018	Existing	
Carlisle & Vine	2920 Carlisle St	150	2018	Existing	
The Mckenzie	3140 Harvard Ave	183	2018	Existing	
Windsor Turtle Creek	3663 Cedar Springs Rd	207	2018	Existing	
Residences At Park District	2120 Olive St	228	2018	Existing	
Gatsby On Ross	4001 Ross Ave	292	2018	Existing	
Hall Street Flats	1800 N Hall St	340	2018	Existing	

### Market Rate (Built Since 2010 Only)

New Properties Since 2010:		# Units:	25,653		
Property Name	Property Address	Total Units	Year Built	Building Status	
Ardan West Village	2975 Blackburn St	389	2018	Existing	
No Name	5923 Lindell Ave	5	2019	Existing	
No Name	5927 Lindell Ave	5	2019	Existing	
No Name	5930 Ross Ave	5	2019	Existing	
No Name	3700 Prescott Ave	8	2019	Existing	
Magnolia On Gaston	6000 Gaston Ave	28	2019	Existing	
The Hudson	4805 McKinney Ave	124	2019	Existing	
Howell Uptown	3400 Howell St	190	2019	Existing	
The Christopher	2323 N Akard St	309	2019	Existing	
Alexan Lower Greenville	5619 Belmont Ave	475	2019	Existing	
No Name	5515 Bryan Pky	5	2020	Existing	
Cedar At The Branch	4606 Amesbury Dr	320	2020	Existing	
The National*	1401 Elm St	(32) 324	2020	Existing	
The Village Drey	8200 Southwestern Blvd	330	2020	Existing	
AmlI At Fountain Place	1800 N Field St	366	2020	Existing	
The Gabriella	770 Cantegral St	378	2020	Existing	
Residences At The Grove	3330 Oak Grove Ave	185	2021	Existing	
Vidorra McKinney Avenue	4700 McKinney Avenue	198	2021	Existing	
Toll Brothers Aster Apartments	3611 Congress Ave	270	2021	Existing	
Nove At Knox	3031 Oliver St	310	2021	Existing	
Eastline Residences	6050 N Central Expy	330	2021	Existing	
Darby Knox District	4444 Cole Ave	333	2021	Existing	
The Academic	3700 Ross Ave	364	2021	Existing	
Atelier	1801 N Pearl St	417	2021	Existing	
The Peak At Fowler	230 S Fulton St	144	2022	Existing	
Selene	2620 Maple Ave	146	2022	Existing	
Novel Turtle Creek	4251 Irving Ave	206	2022	Existing	
The Galbraith	2400 Bryan St	217	2022	Existing	
Modera Katy Trail	5350 McKinney Ave	217	2022	Existing	
Ele	5714 Richmond Ave	236	2022	Existing	
No Name	5831 Sandhurst Ln	0	2022	Existing	
No Name	5647 Live Oak	5	2023	Existing	
No Name	2727 Turtle Creek Blvd	250	2024	Final Planning	
Lincoln Katy Trail	3203 Carlisle St	309	2023	Proposed	
No Name	Sw Corner Of Oak Lawn & Lemmon Ave	297	2024	Proposed	
Mockingbird Station Apartments	5465 E Mockingbird Ln	481	2024	Proposed	

**Note(s):** Asterisked (\*) properties leverage Public Facility Corporation or TIF financing. Units in parenthesis denote units with rents restricted as part of a financing agreement.

**Source(s):** NHPD, CoStar, HR&A Calculations.

# APPENDIX | LIST OF PROPERTIES: COUNCIL DISTRICT 14

## District: 14

### Market Rate (Built Since 2010 Only)

Property Name	Property Address	Total Units	Year Built	Building Status
<b>New Properties Since 2010:</b>		117	<b># Units:</b> 25,653	
No Name	4515 Travis St	150	2025	Proposed
2000 Ross	2000 Ross Ave	400	2025	Proposed
North End Park - Northend Redevelopment	2353 N Field St	895	2025	Proposed
No Name	2004 Lucille St	6	2023	Under Construction
No Name	3915-4001 Roseland Ave	16	2023	Under Construction
The Santander Tower Apartments	1601 Elm St	229	2023	Under Construction
Maple Terrace	3001 Maple Ave	345	2023	Under Construction
The Jackson Apartments	210 S Harwood St	130	2024	Under Construction
Bryan Tower Apartments	2001 Bryan St	289	2024	Under Construction

**Note(s):** \*Properties with Public Facility Corporation and TIF financing. Units in parenthesis denote affordable units as part of financing agreement.

**Source(s):** NHPD, CoStar, HR&A Calculations.

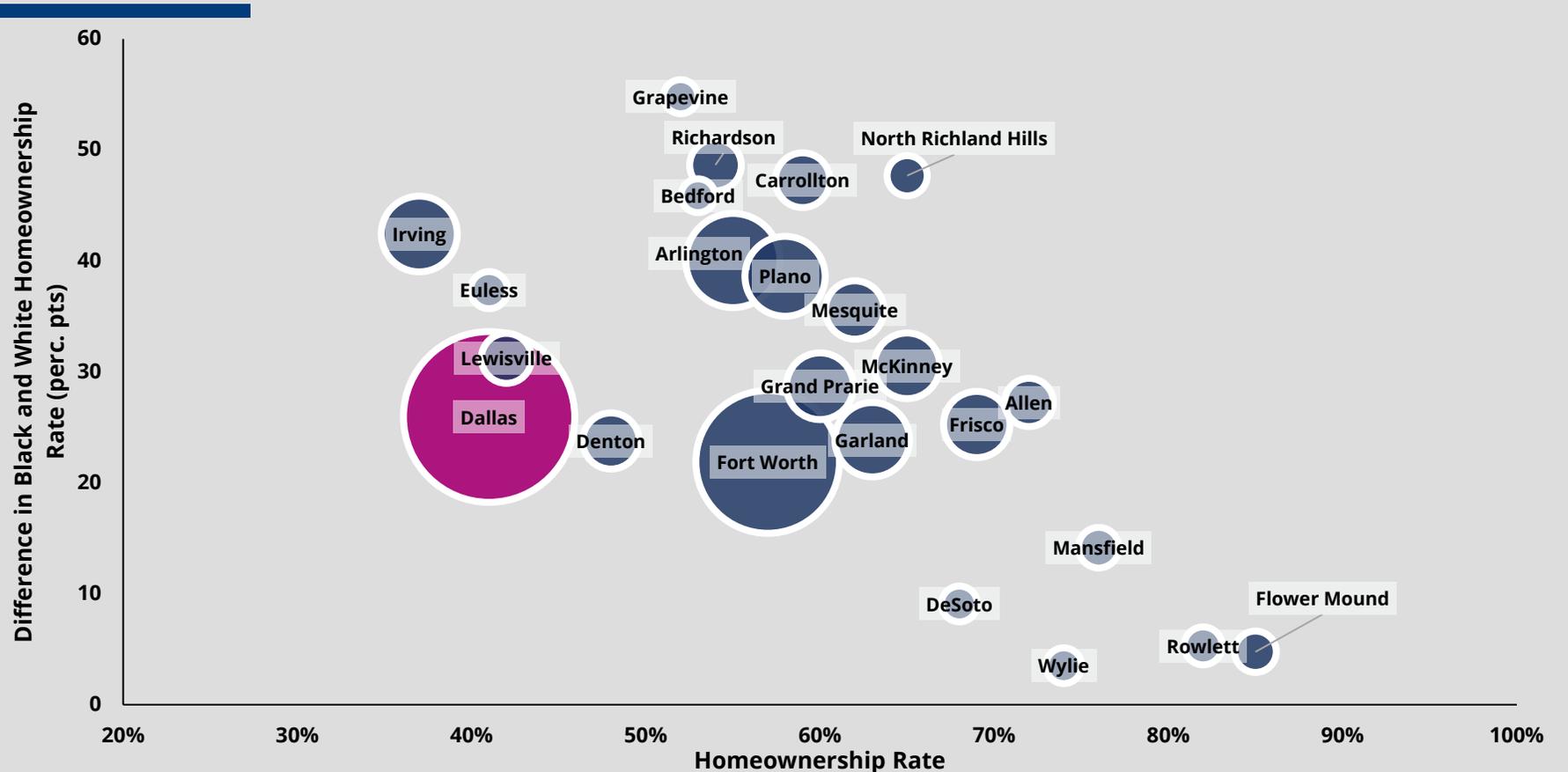
## APPENDIX | TENURE BY RACE COMPARISONS

In cities neighboring Dallas, the Black-White homeownership rate gap is wider, and homeownership is declining due to new rental home construction.

While the City of Dallas has a higher Black and non-Hispanic White homeownership rate gap than Fort Worth (26 points and 22 points respectively), the gap is lower than the rapidly growing cities to the north and west of Dallas, like Richardson, Arlington, and Plano.

While those cities are adding new housing stock to the market, most new units are rental units, and many single-family homes that were previously owner-occupied are now renter-occupied. New Black and Hispanic/Latino residents entering these markets compete with higher-income Asian and non-Hispanic White residents, further exacerbating the homeownership rate gap.

**Difference in Black and Non-Hispanic White Homeownership Rate for DFW Cities (2021, limited to cities with population over 50,000 )**



**Note:** The size of the bubble corresponds to the population of the city.

**Source(s):** ACS 2021 5-year estimates, B25003 (A, B): Tenure (By Race).

## APPENDIX | TENURE BY RACE COMPARISONS

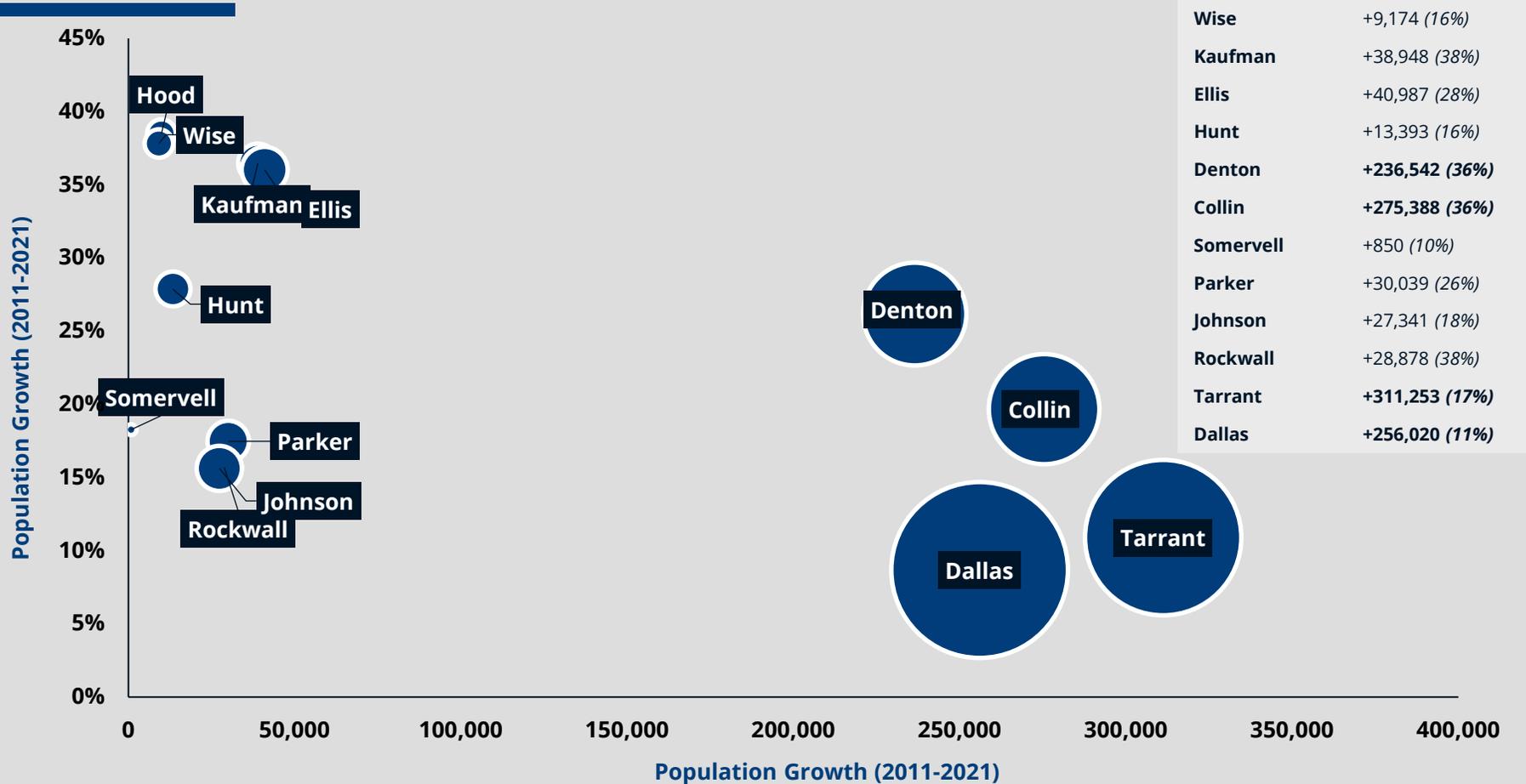
Smaller counties in the Dallas-Fort Worth Metro led growth relative to 2011, while Tarrant and Collin County added more people than Dallas County between 2011 and 2021.

Within the Dallas-Fort Worth Metro, the two largest counties, Dallas and Tarrant, had the lowest population growth rates at 9% and 11% respectively.

Smaller counties in the Dallas-Fort Worth Metro led growth relative to 2011, while Tarrant and Collin County added more people than Dallas County between 2011 and 2021. Exurban counties like Hood and Wise County grew rapidly compared to their 2011 populations, but only added about 20,000 new people.

Tarrant and Collin counties both added more people than Dallas County (~311,000 and 275,000 respectively), with Denton County closely trailing Dallas County with 236,000 new residents.

**Dallas-Fort Worth Metro Area Population Growth by County (2011-2021)**

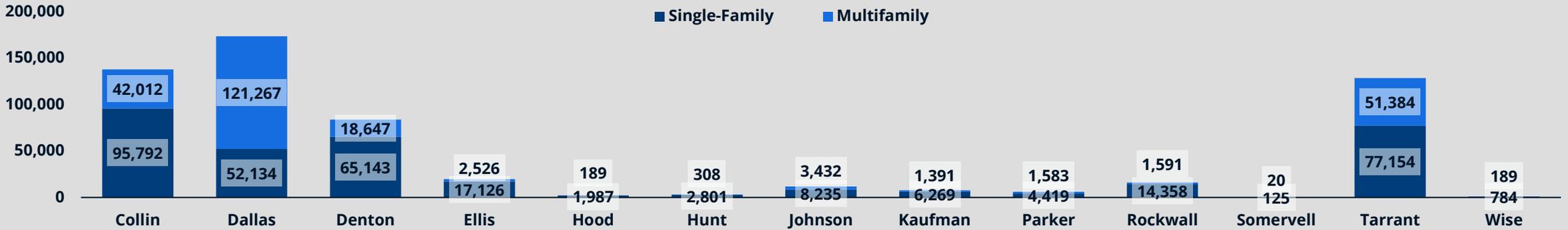


Source(s): ACS 2011-2021 5-year estimates, B01003: Total Population.

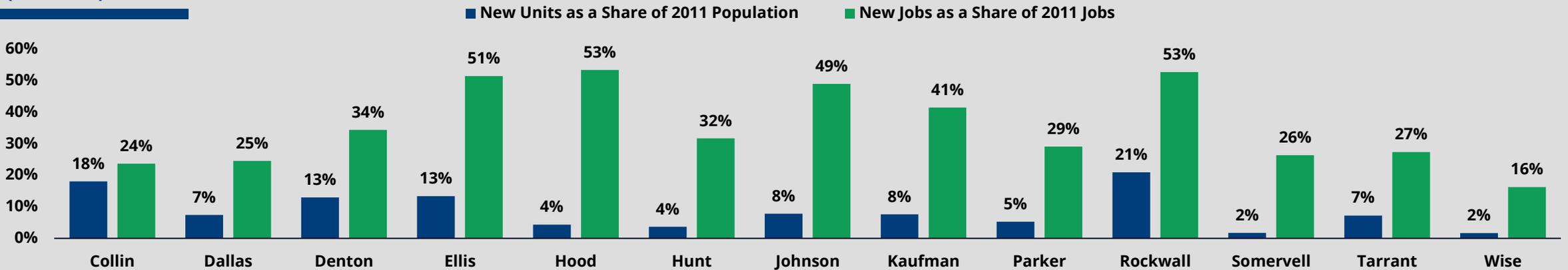
## APPENDIX | TENURE BY RACE COMPARISONS

Most new housing production has been in Dallas, Collin, Denton, and Tarrant County. Collin and Denton County have had the highest relative increase in new units, in line with population and job increases in the counties.

### New Unit Production (2011-2021)



### New Units Produced as a Share of the 2011 Population (2011-2021)



Source(s): HUD, Units in Single-Family, Units in Multifamily, ACS 2011-2021 5-Year Estimates. B25001: Housing Units.