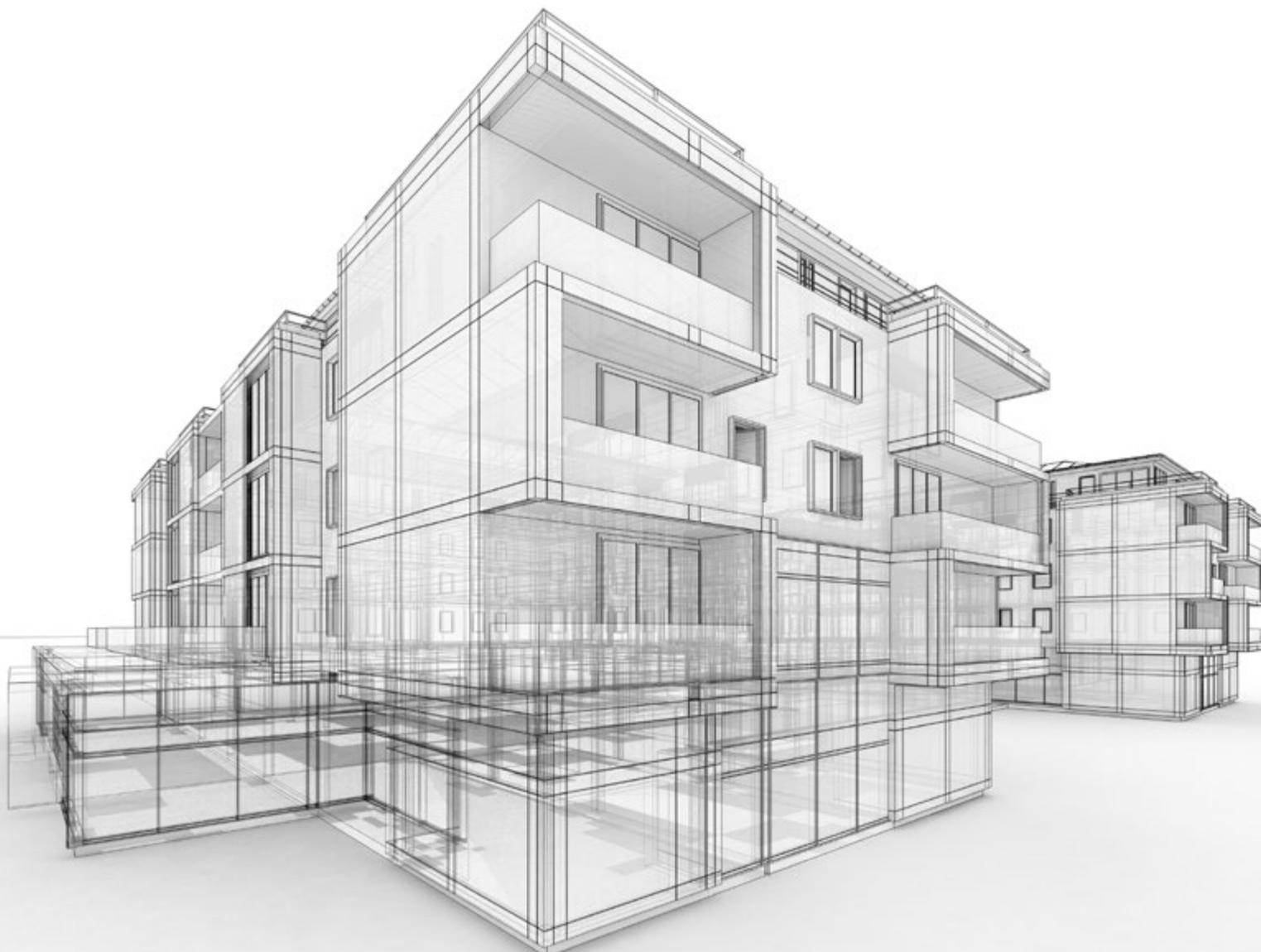




ARLINGTON 2012 MULTI-FAMILY HOUSING PROFILE



SEPTEMBER 17, 2013

HOUSINGDATA

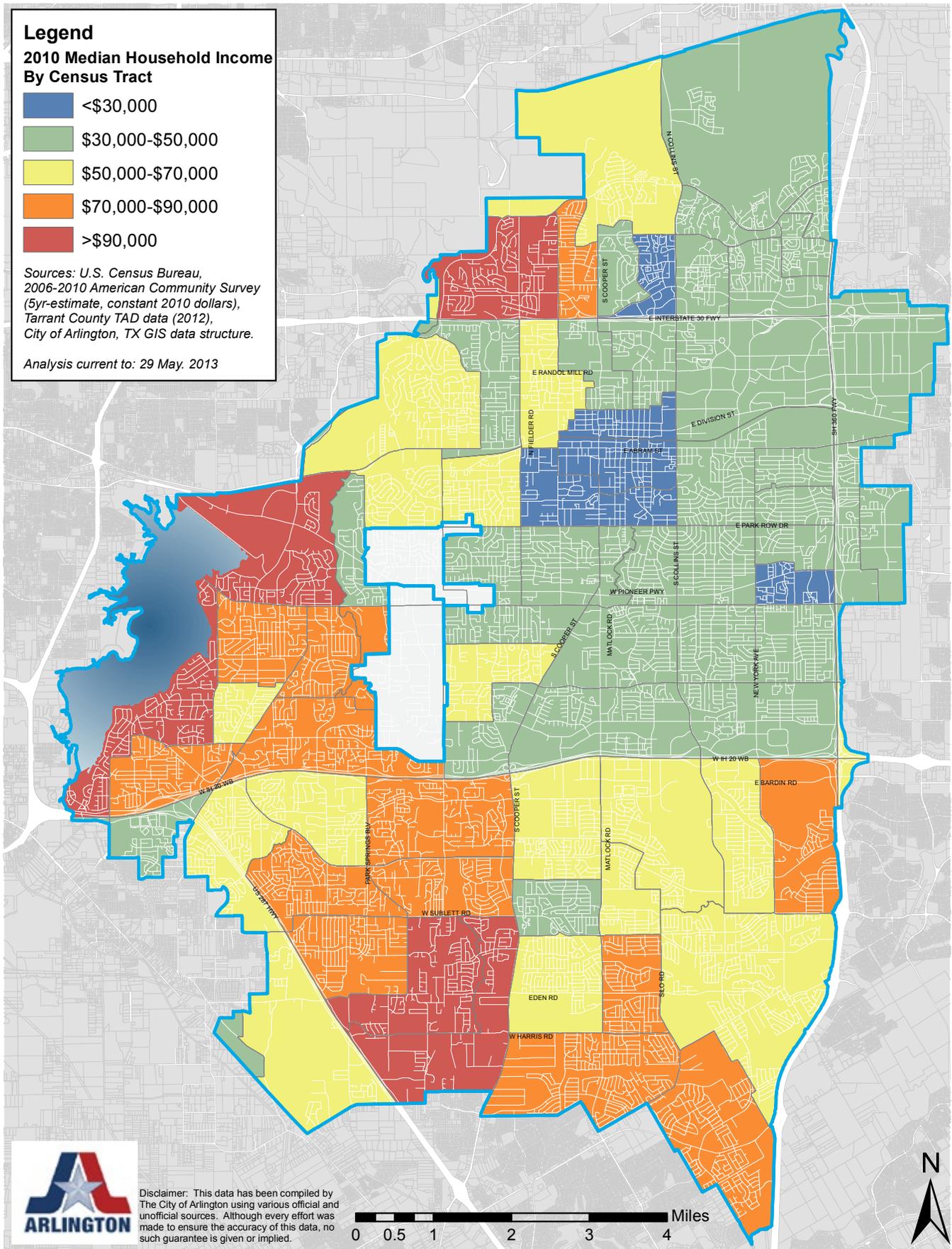
Legend

2010 Median Household Income By Census Tract



Sources: U.S. Census Bureau,
2006-2010 American Community Survey
(5yr-estimate, constant 2010 dollars),
Tarrant County TAD data (2012),
City of Arlington, TX GIS data structure.

Analysis current to: 29 May, 2013

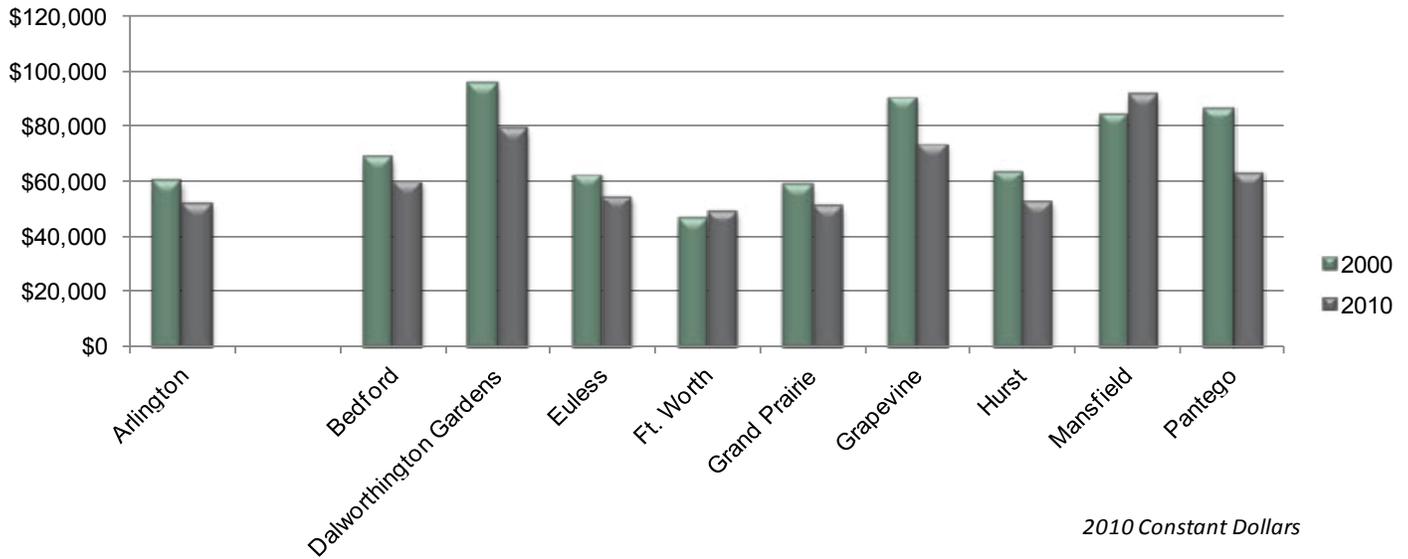


Disclaimer: This data has been compiled by
The City of Arlington using various official and
unofficial sources. Although every effort was
made to ensure the accuracy of this data, no
such guarantee is given or implied.

0 0.5 1 2 3 4 Miles



Median Household Income, 2000-2010



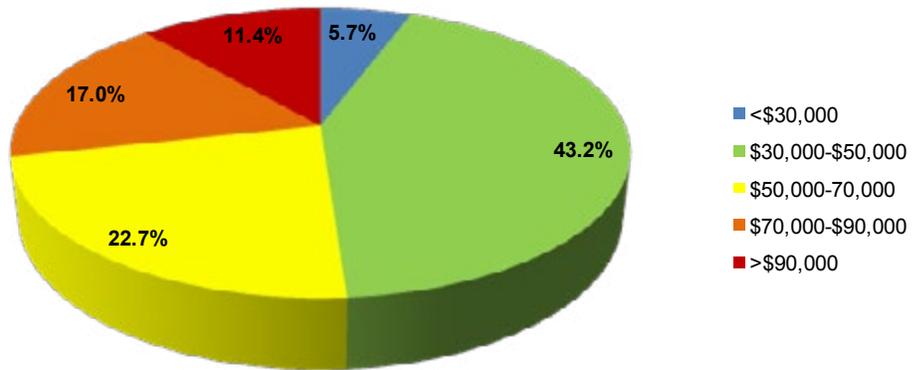
MEDIAN HOUSEHOLD INCOME 2000, 2010

CITY	2000*	2010
ARLINGTON, TEXAS	\$60,304	\$52,094
BEDFORD	\$68,932	\$60,084
DALWORTHINGTON GARDENS	\$95,641	\$79,318
EULESS	\$62,785	\$54,885
FT. WORTH	\$46,947	\$49,530
GRAND PRAIRIE	\$59,283	\$51,368
GRAPEVINE	\$90,768	\$73,633
HURST	\$63,782	\$52,913
MANSFIELD	\$84,543	\$91,959
PANTEGO	\$86,831	\$63,250

*Note: Median values in constant 2010 dollars

Source: U.S. Census Bureau, Census 2000
Summary File 3, U.S. Census Bureau, 2006-2010
American Community Survey (5yr-estimate)

Percentage of Median Income By Census Tract, 2010



The City of Arlington defines multi-family housing as: triplexes, quadplexes, and apartments.

This Profile is intended to provide an overview of the City of Arlington's multi-family housing stock inclusive of housing data, characteristics, development potential, and policy.

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Legend

Locations of Multi-Family Properties



UTA

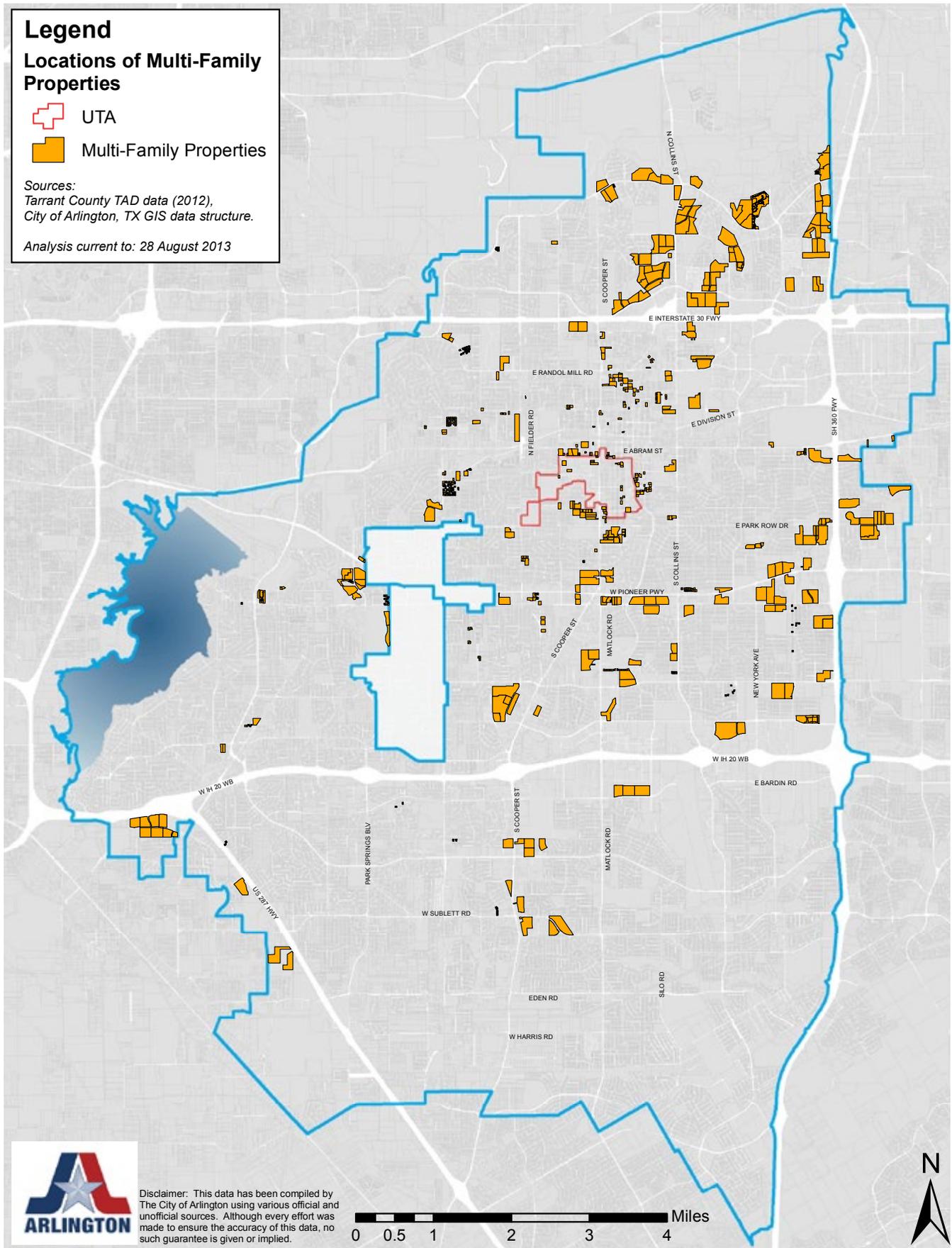


Multi-Family Properties

Sources:

Tarrant County TAD data (2012),
City of Arlington, TX GIS data structure.

Analysis current to: 28 August 2013

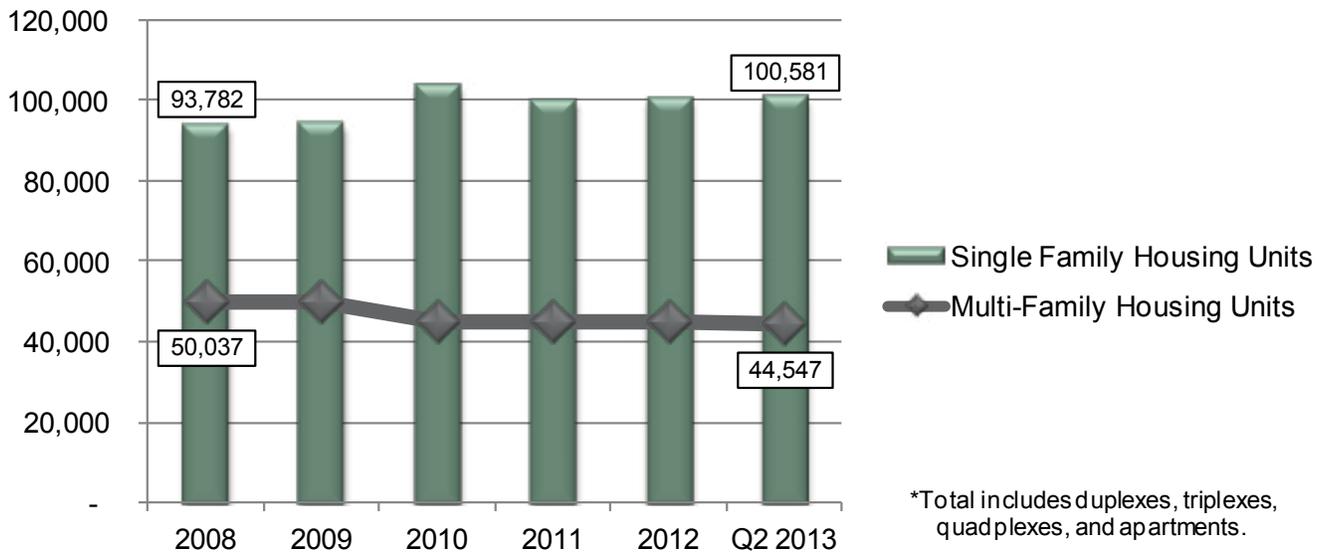


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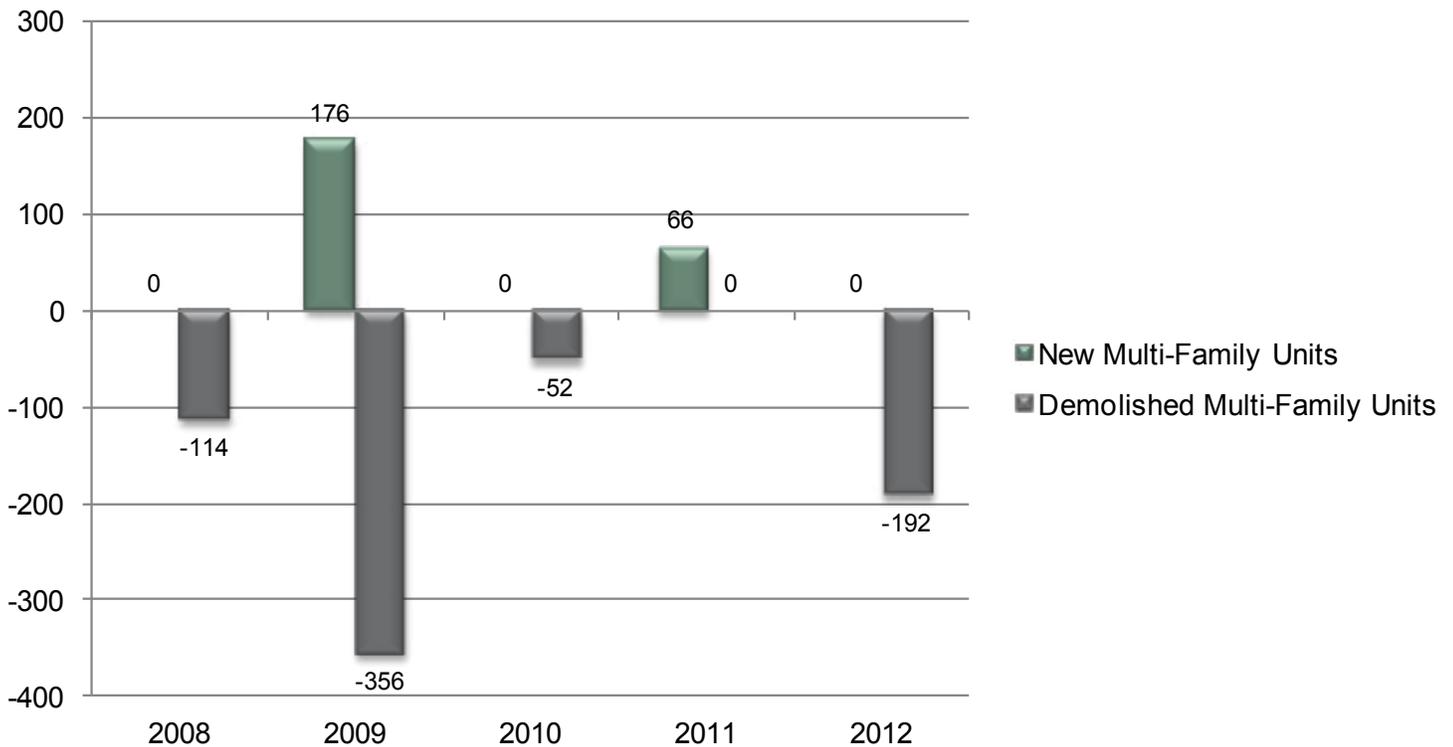
0 0.5 1 2 3 4 Miles



Total Housing by Type, 2008-2013*



Apartment Permitting 2008-2012



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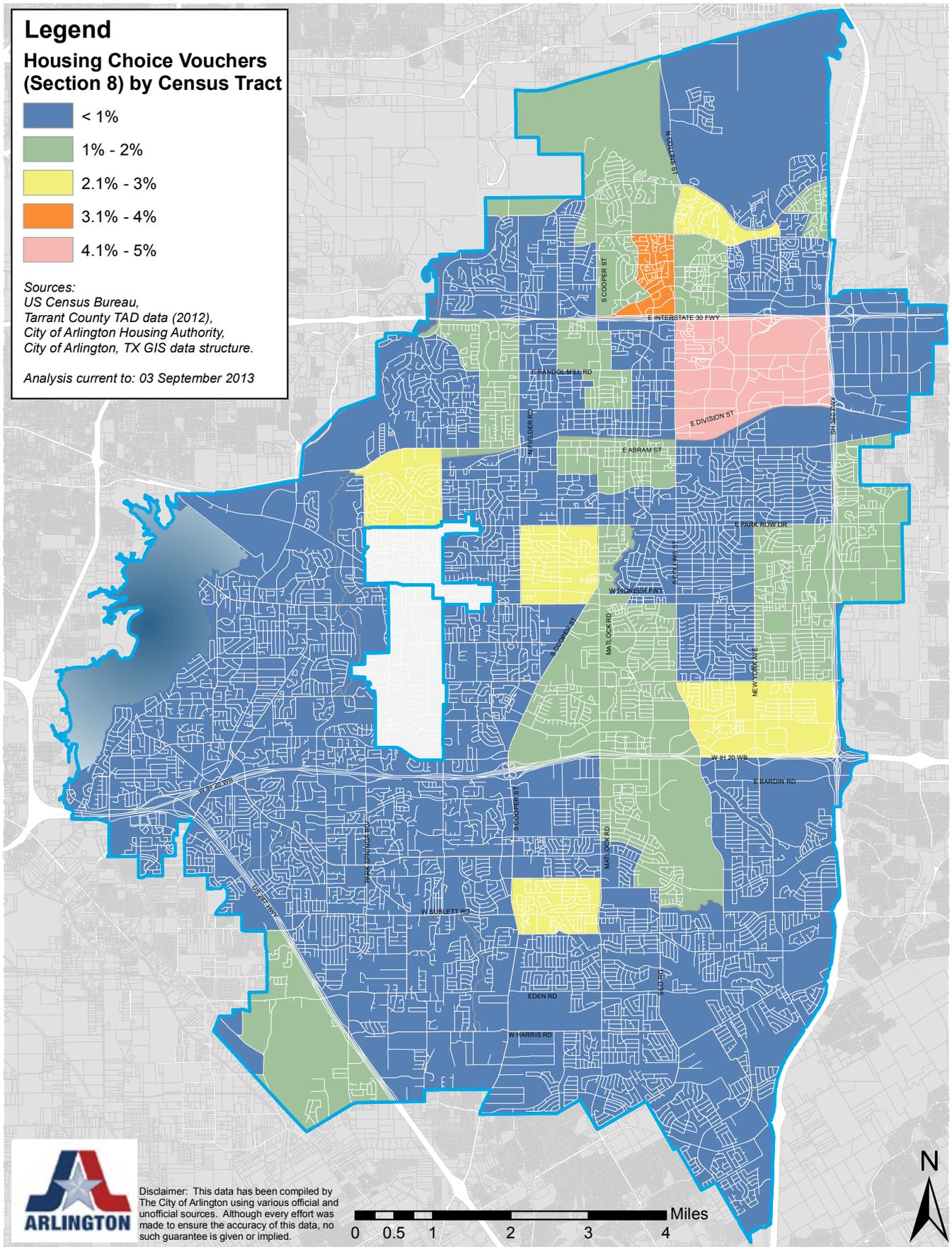
Legend

Housing Choice Vouchers (Section 8) by Census Tract

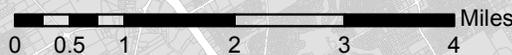


Sources:
 US Census Bureau,
 Tarrant County TAD data (2012),
 City of Arlington Housing Authority,
 City of Arlington, TX GIS data structure.

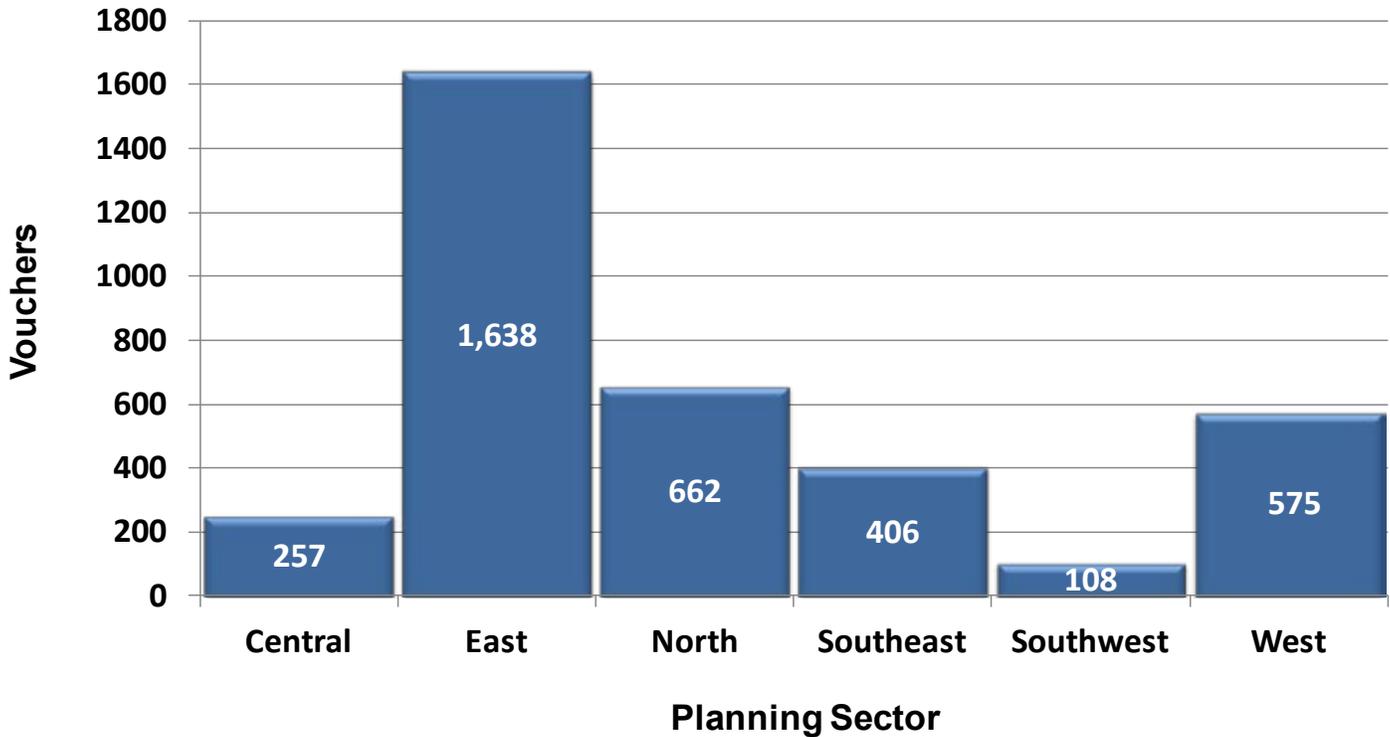
Analysis current to: 03 September 2013



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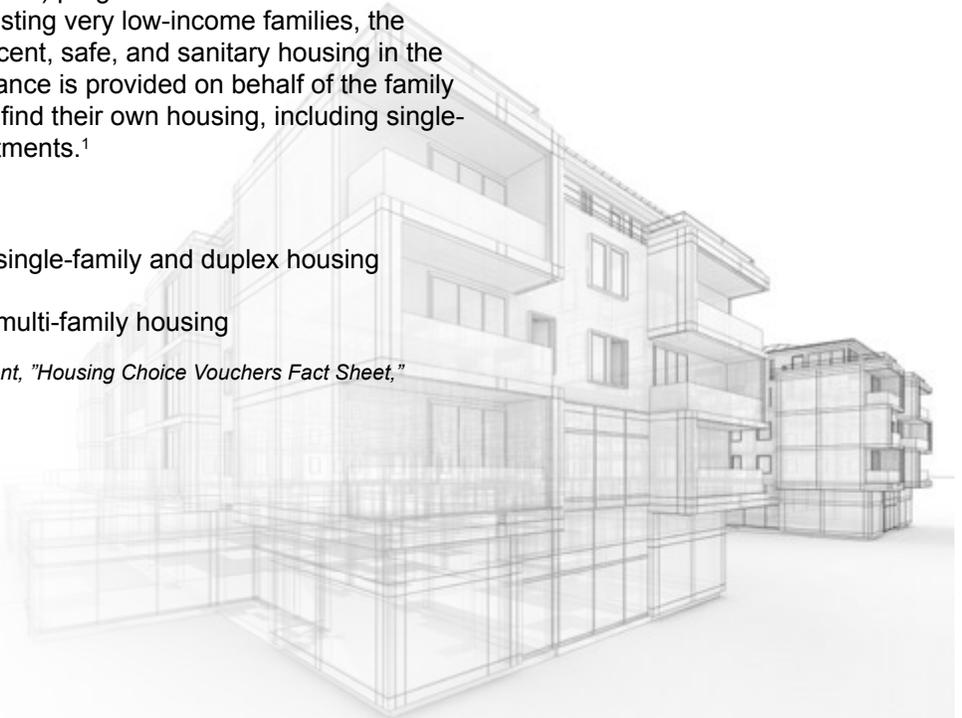
Housing Choice Vouchers (Section 8) By Planning Sector



City of Arlington Housing Choice Vouchers (Section 8) Statistics

- The Housing Choice Voucher (Section 8) program is the federal government's major program for assisting very low-income families, the elderly, and the disabled to afford decent, safe, and sanitary housing in the private market. Since housing assistance is provided on behalf of the family or individual, participants are able to find their own housing, including single-family homes, townhouses and apartments.¹
- Voucher total: 3,646
 - 1,080 vouchers associated with single-family and duplex housing
 - 2,566 vouchers associated with multi-family housing

¹US Department of Housing and Urban Development, "Housing Choice Vouchers Fact Sheet," HUD.gov, accessed 9 September 2013.



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Legend

Residential Occupancy Rates By Census Tract

96% - 100%

91% - 95%

81% - 90%

71% - 80%

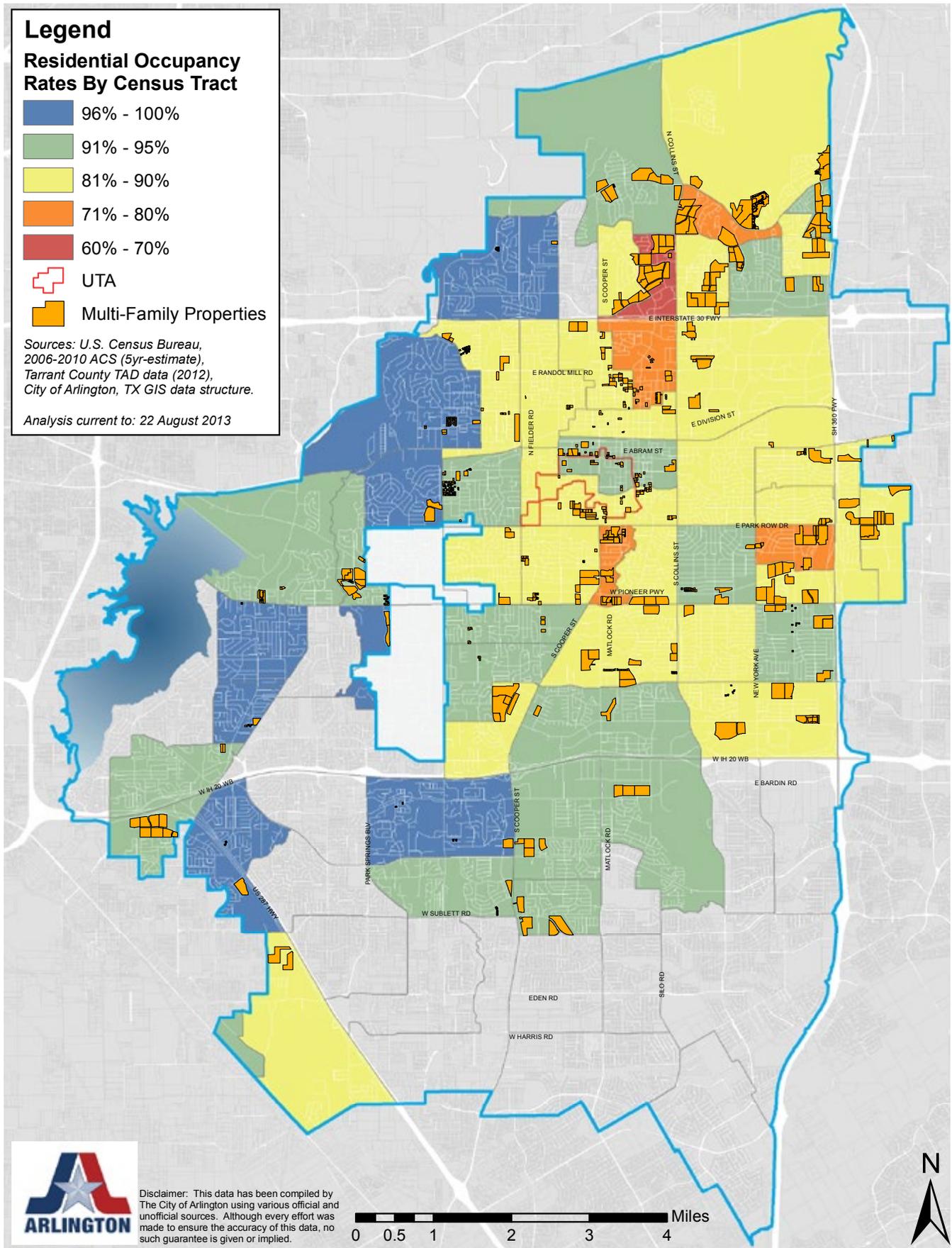
60% - 70%

UTA

Multi-Family Properties

Sources: U.S. Census Bureau, 2006-2010 ACS (5yr-estimate), Tarrant County TAD data (2012), City of Arlington, TX GIS data structure.

Analysis current to: 22 August 2013

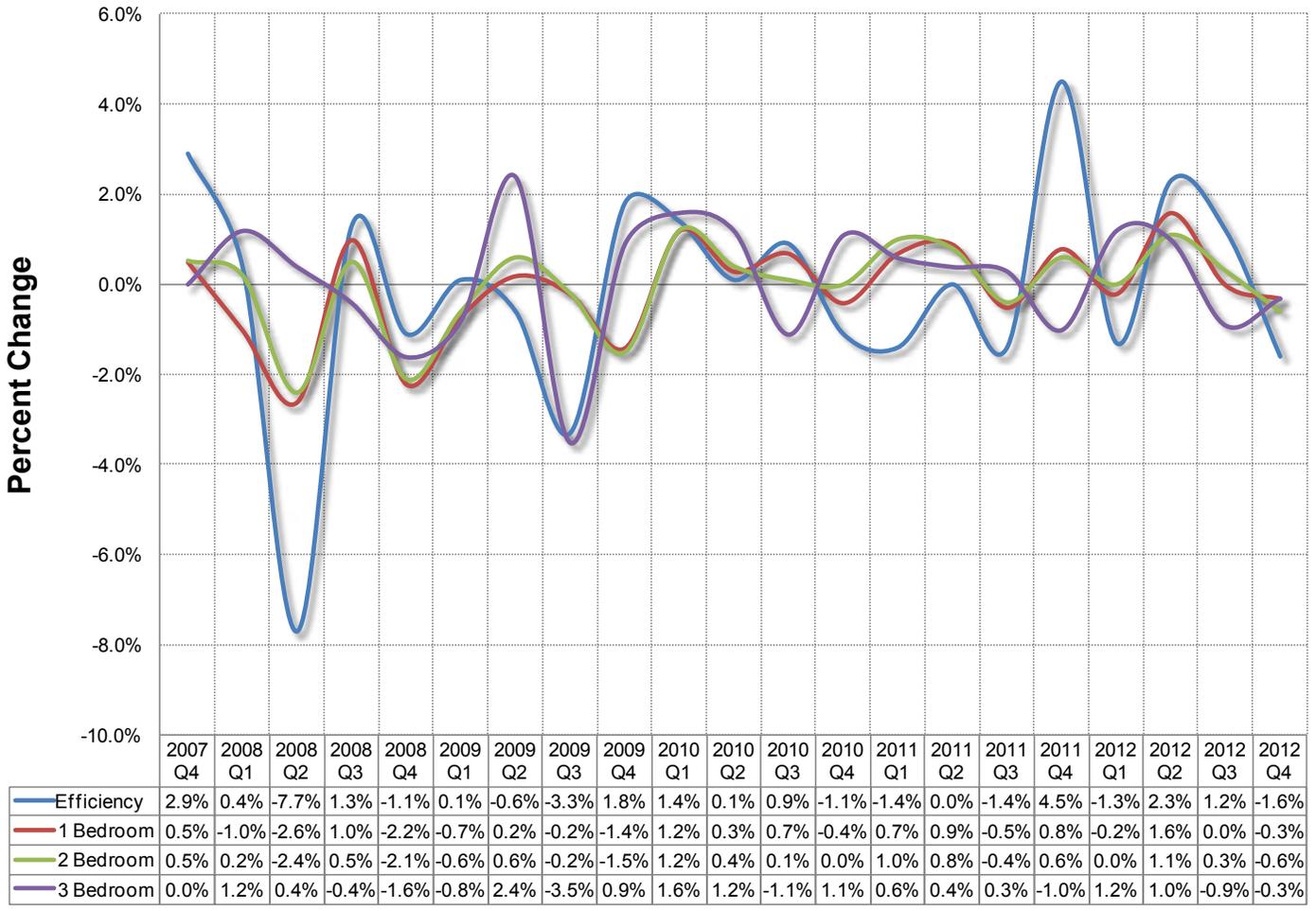


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0 0.5 1 2 3 4 Miles



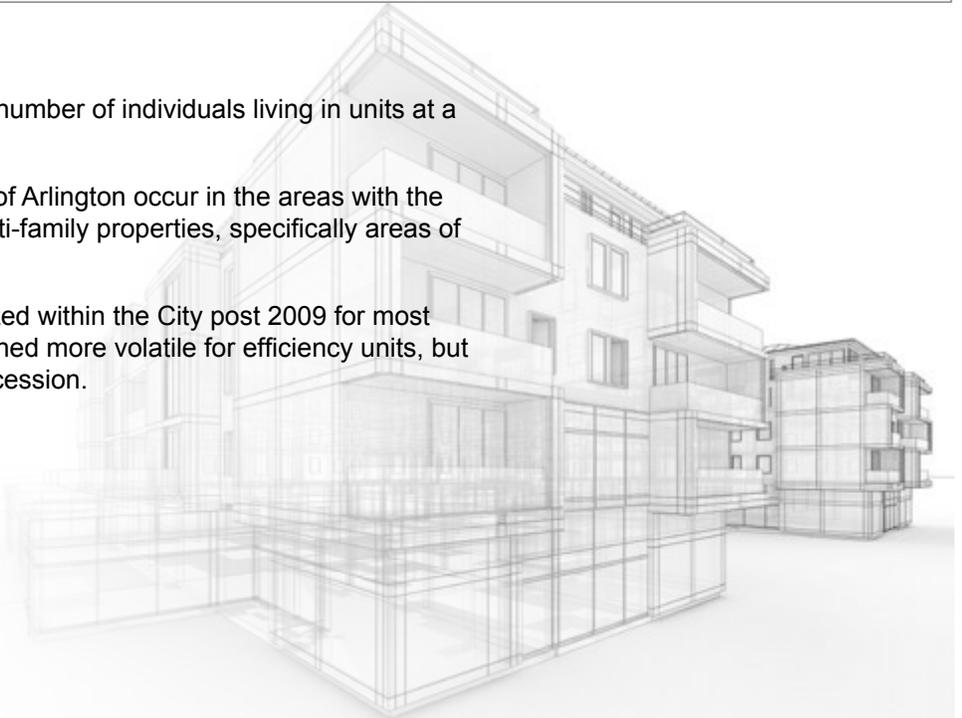
Change in Occupancy by Quarter, 2007 - 2012



The occupancy rate is a measure of the number of individuals living in units at a property.

The lowest occupancy rates for the City of Arlington occur in the areas with the highest concentration of larger scale multi-family properties, specifically areas of North and East Arlington.

In general, occupancy rates have stabilized within the City post 2009 for most unit types. Occupancy rates have remained more volatile for efficiency units, but not to the extents during the height of recession.



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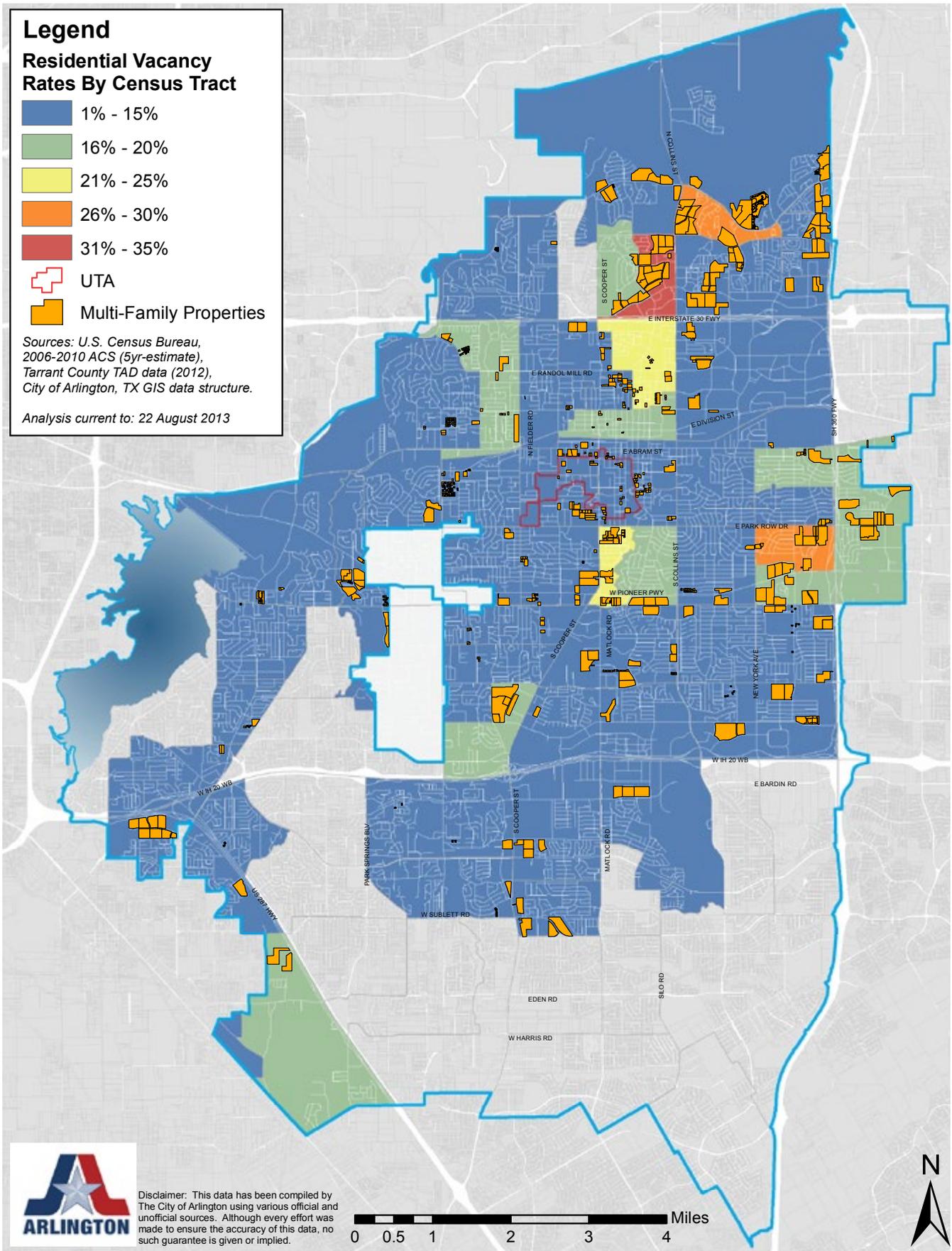
Legend

Residential Vacancy Rates By Census Tract

- 1% - 15%
- 16% - 20%
- 21% - 25%
- 26% - 30%
- 31% - 35%
- UTA
- Multi-Family Properties

Sources: U.S. Census Bureau, 2006-2010 ACS (5yr-estimate), Tarrant County TAD data (2012), City of Arlington, TX GIS data structure.

Analysis current to: 22 August 2013



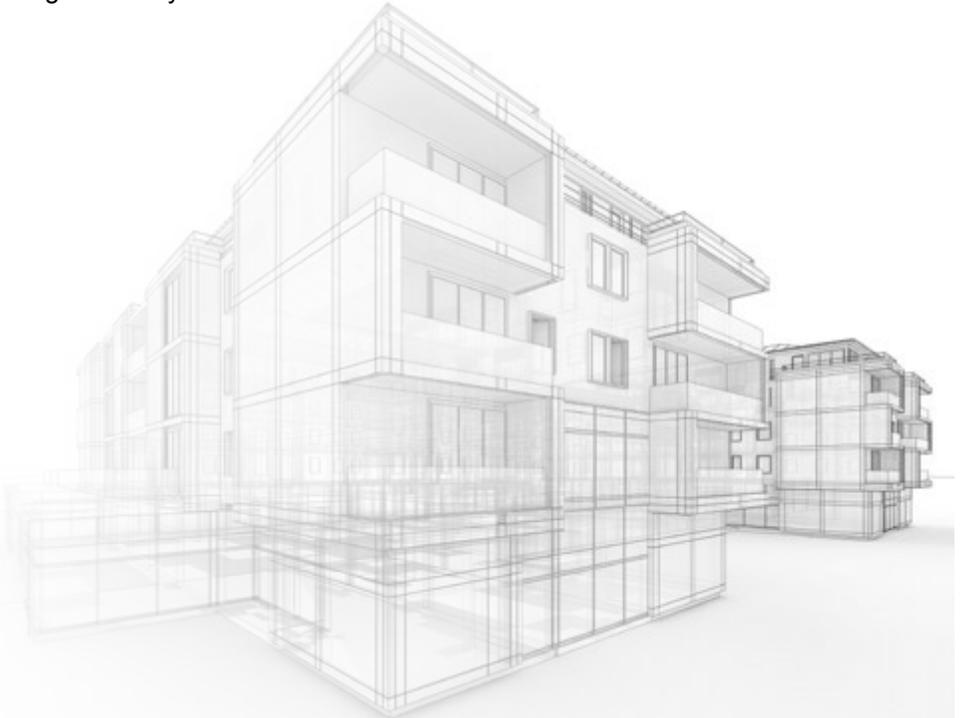
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0 0.5 1 2 3 4 Miles

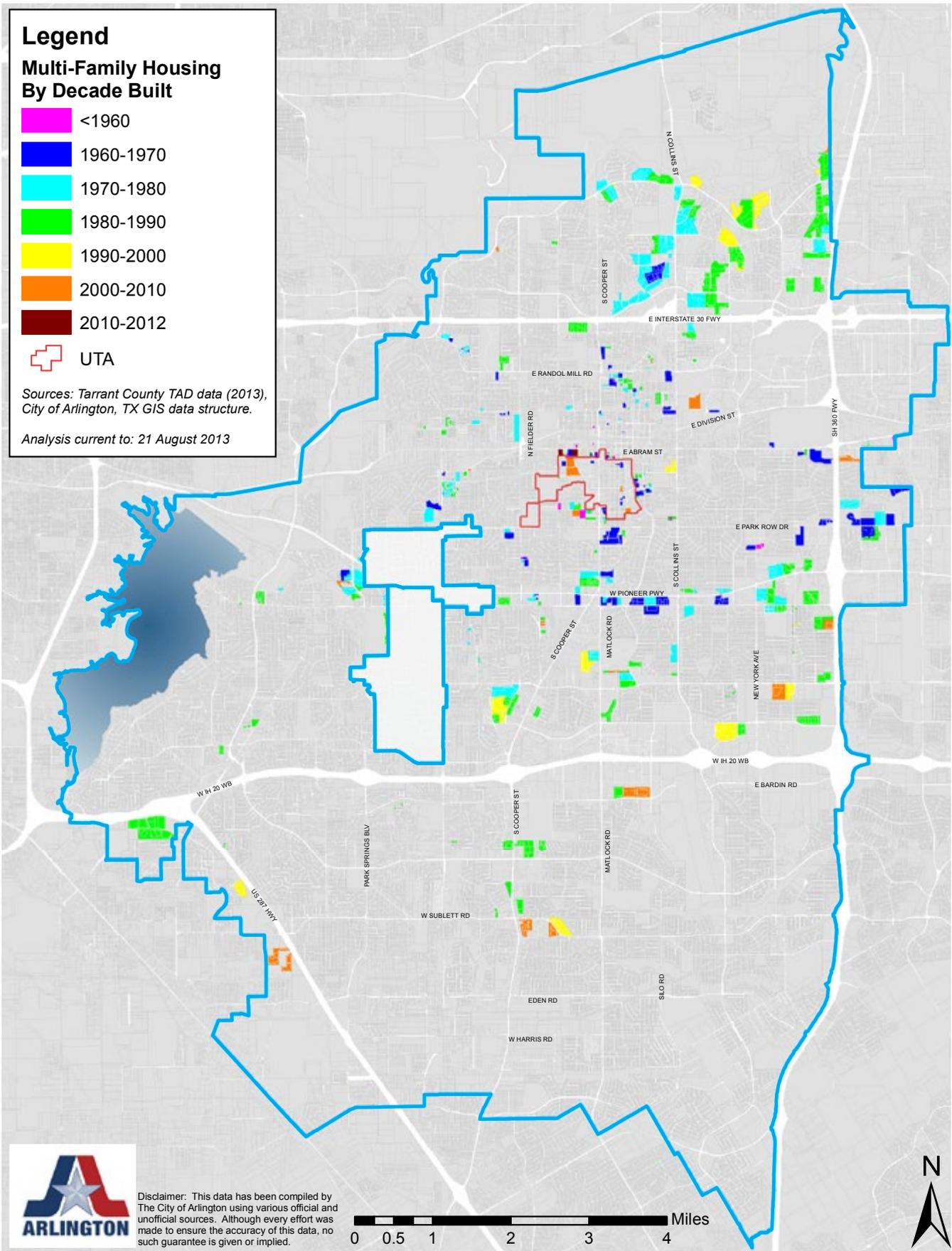


The vacancy rate describes the availability of units for immediate move-in.

The lowest vacancy rates for the City of Arlington mostly occur in the area south of I-30.

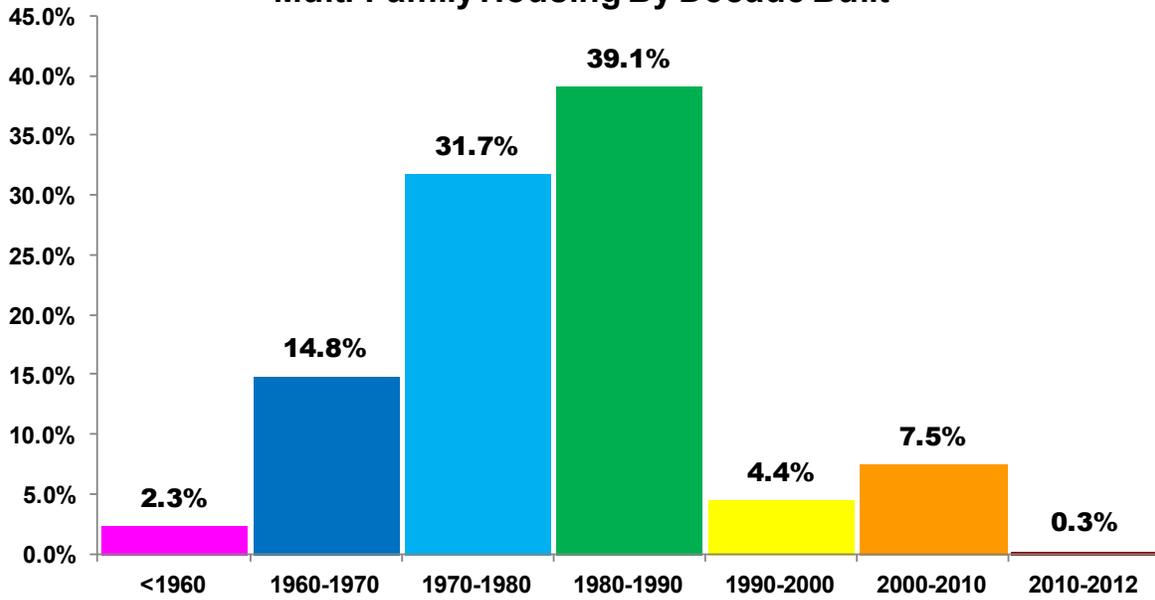


HOUSING CHARACTERISTICS



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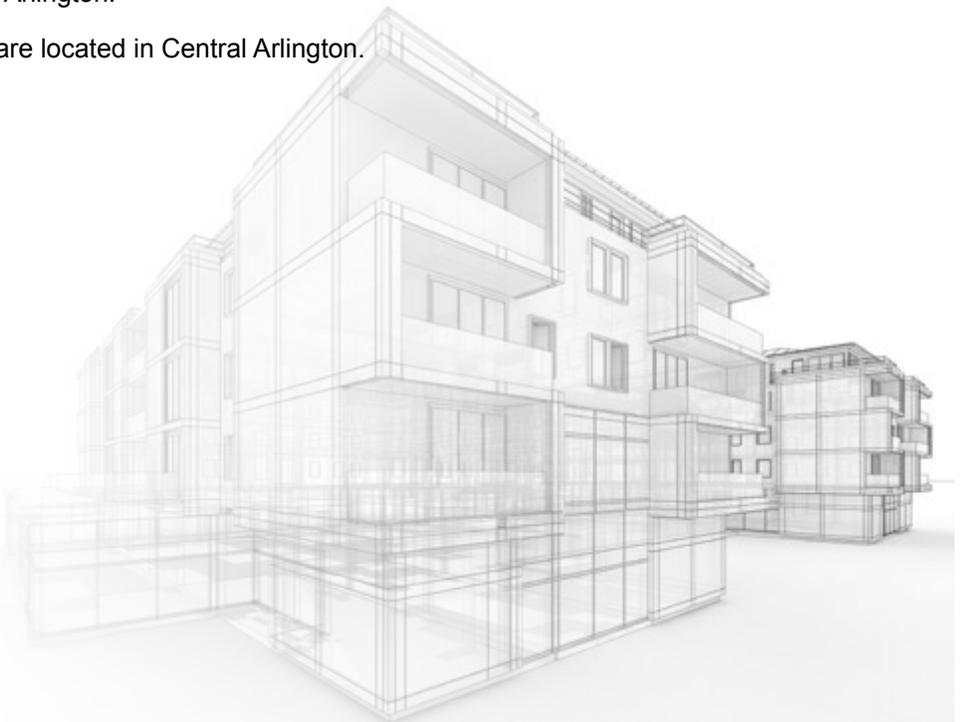
Multi-Family Housing By Decade Built



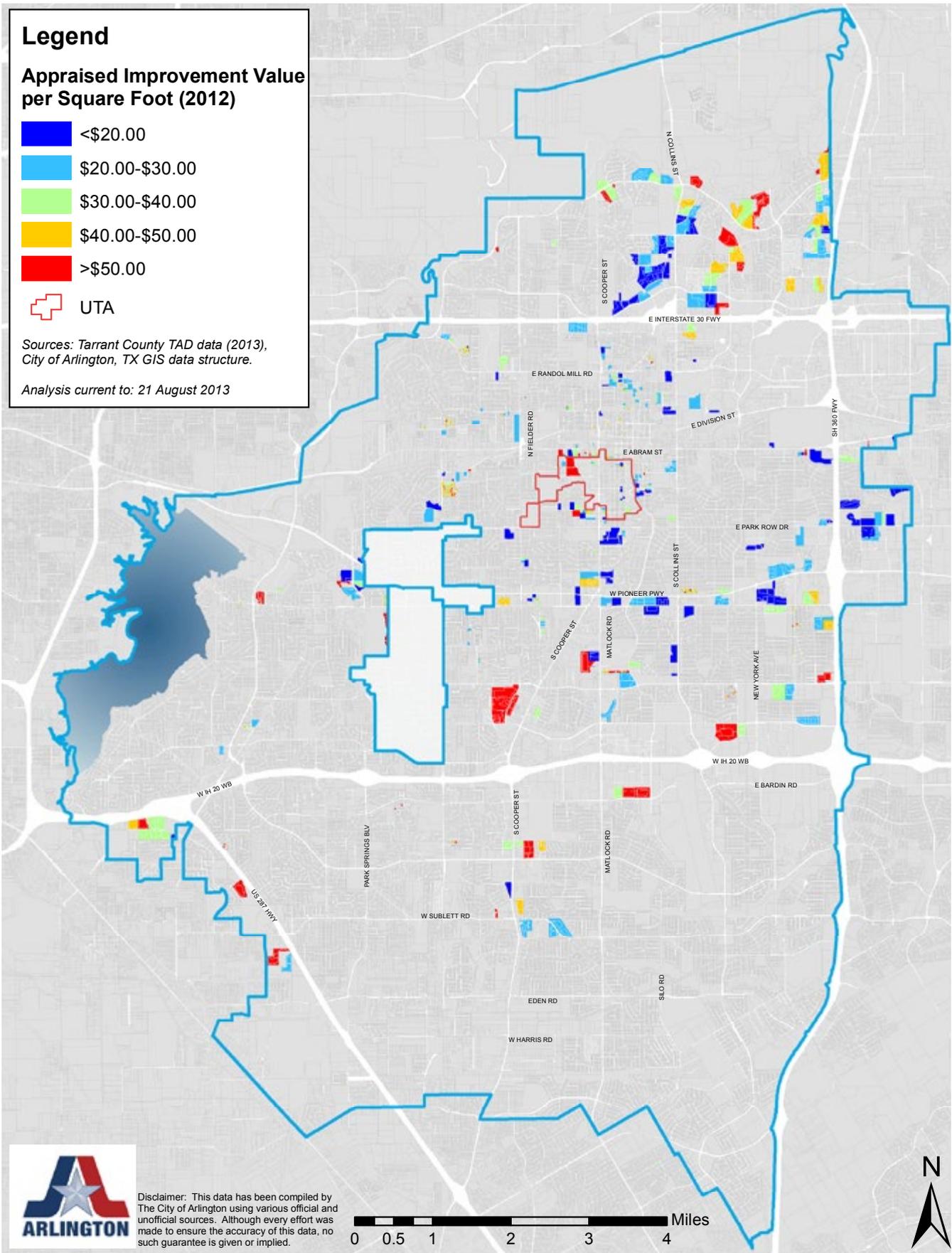
The majority of properties were built between 1970 and 1990.

The oldest properties are located in East Arlington.

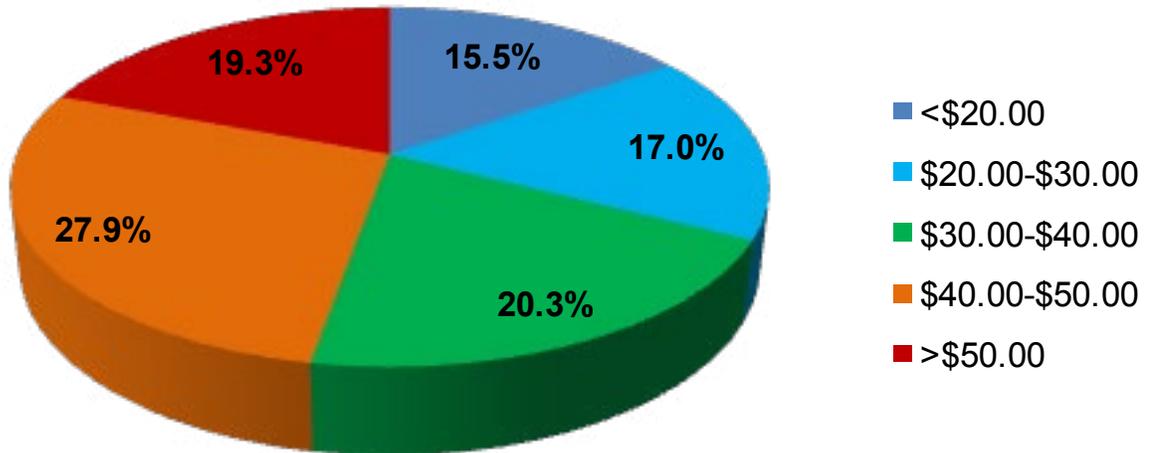
The most recently developed properties are located in Central Arlington.



HOUSING CHARACTERISTICS

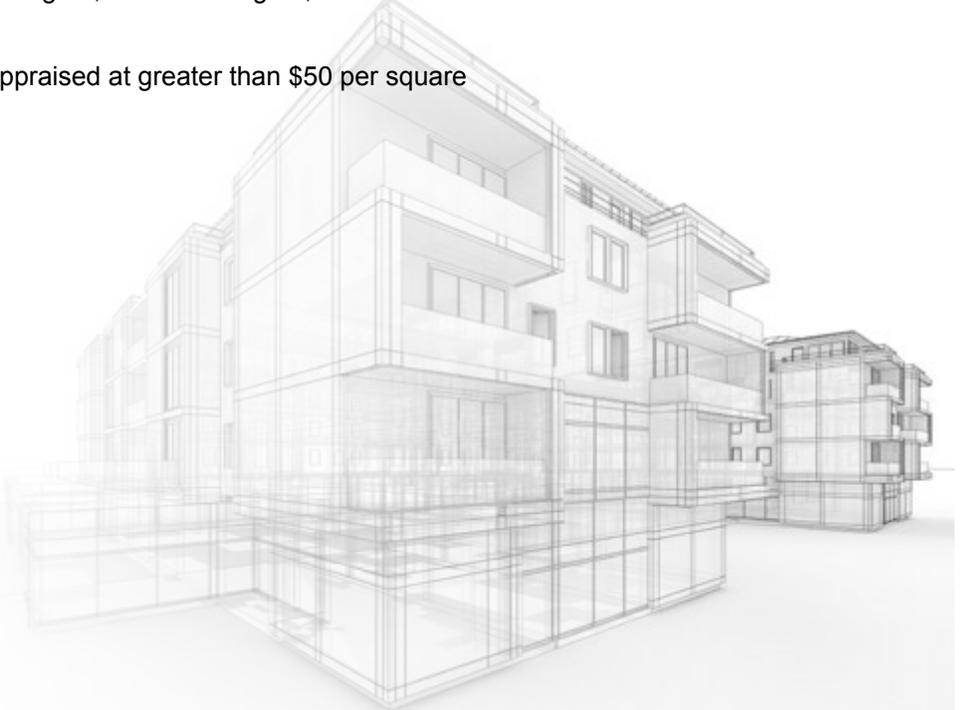


Appraised Improvement Value Per Square Foot, 2012

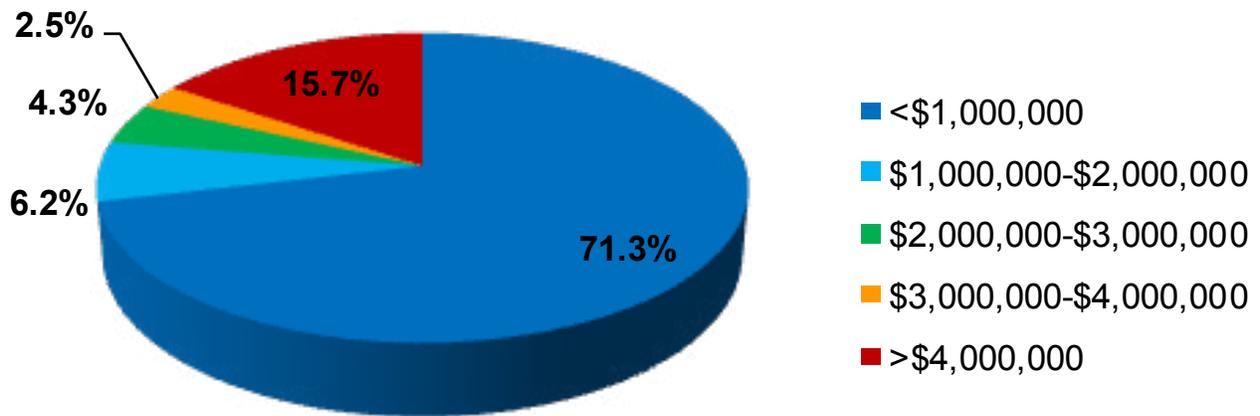


A substantial portion of multi-family residential stock within the City of Arlington are valued at less than \$20 per square foot of living space. These properties are concentrated in the areas of: North Arlington, Central Arlington, and East Arlington.

Only 48 properties have improvements appraised at greater than \$50 per square foot.

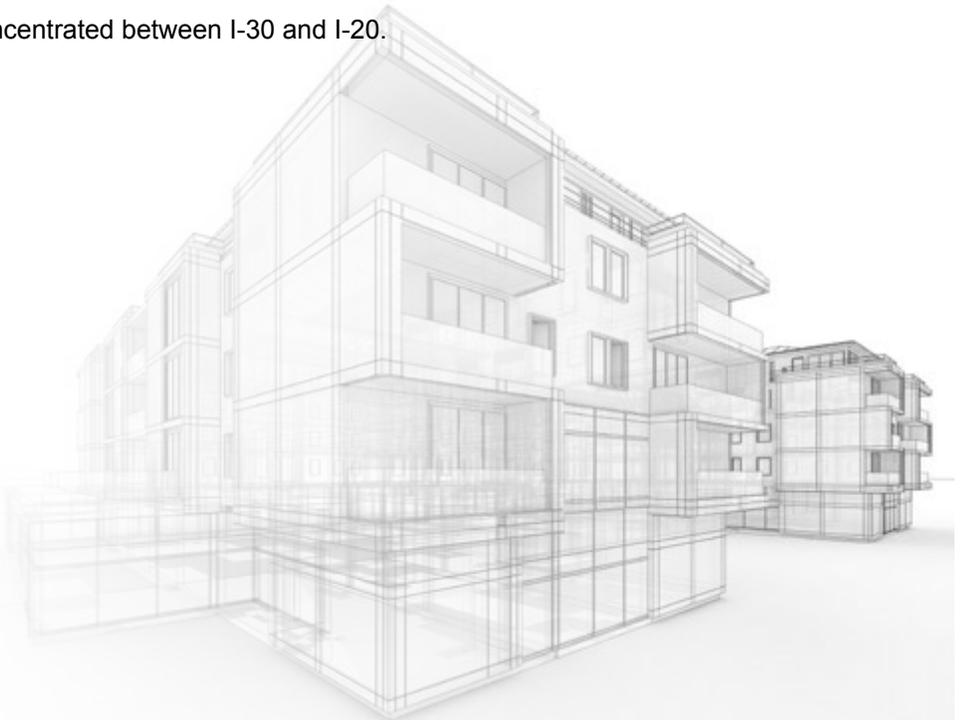


Total Appraised Value, 2012



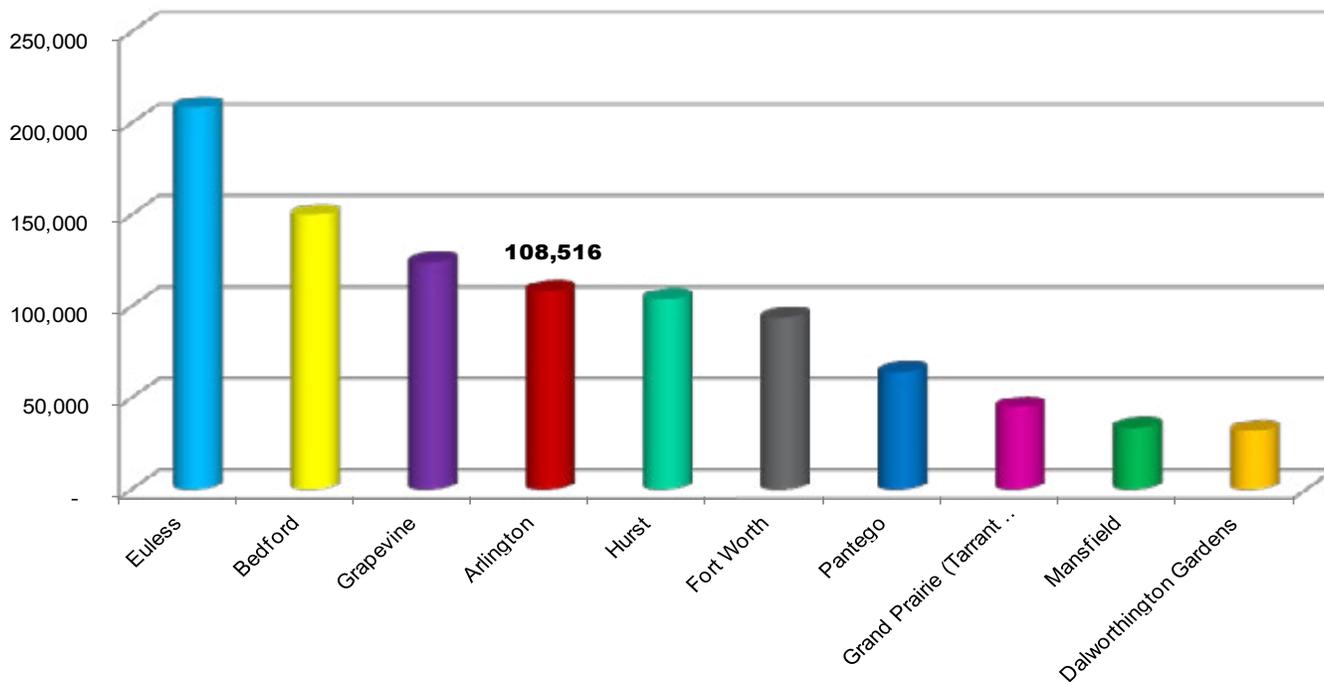
While large in size, properties valued at more than \$4M only account for 16% of the multi-family stock.

Properties with the lowest values are concentrated between I-30 and I-20.

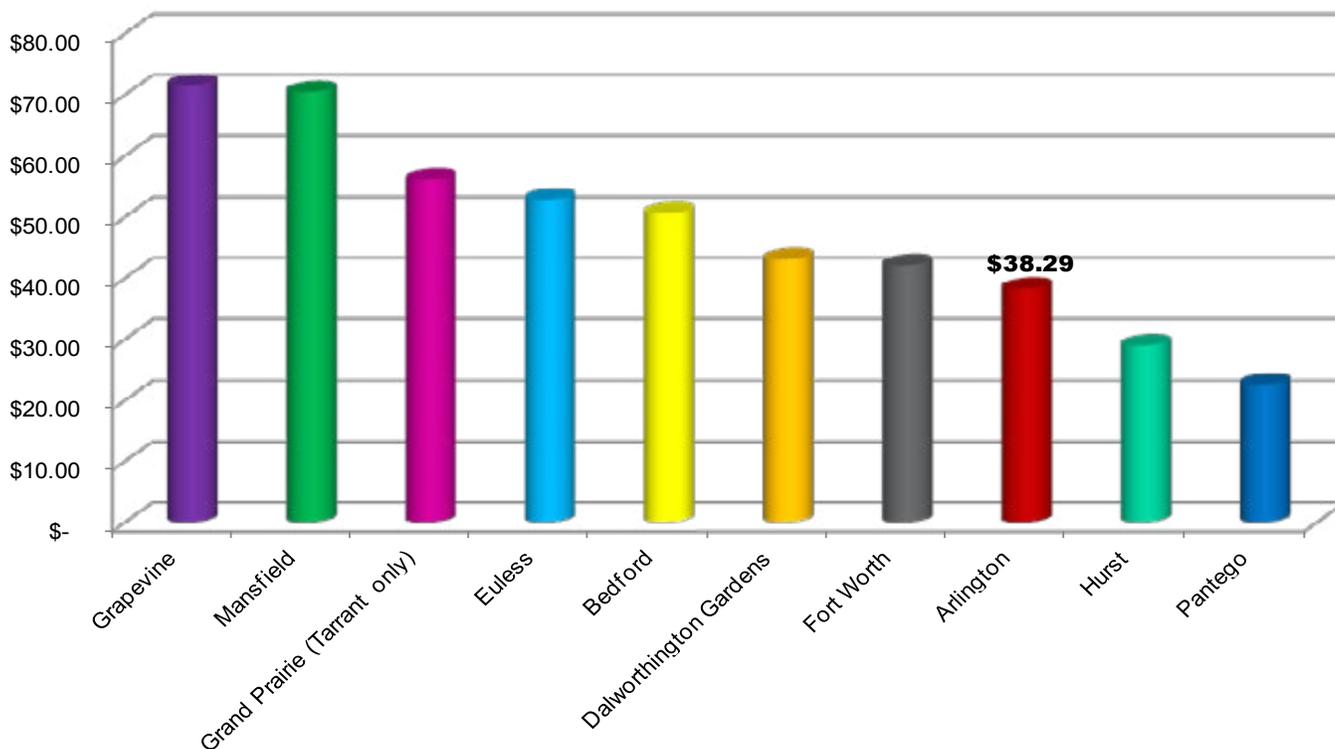


HOUSING CHARACTERISTICS

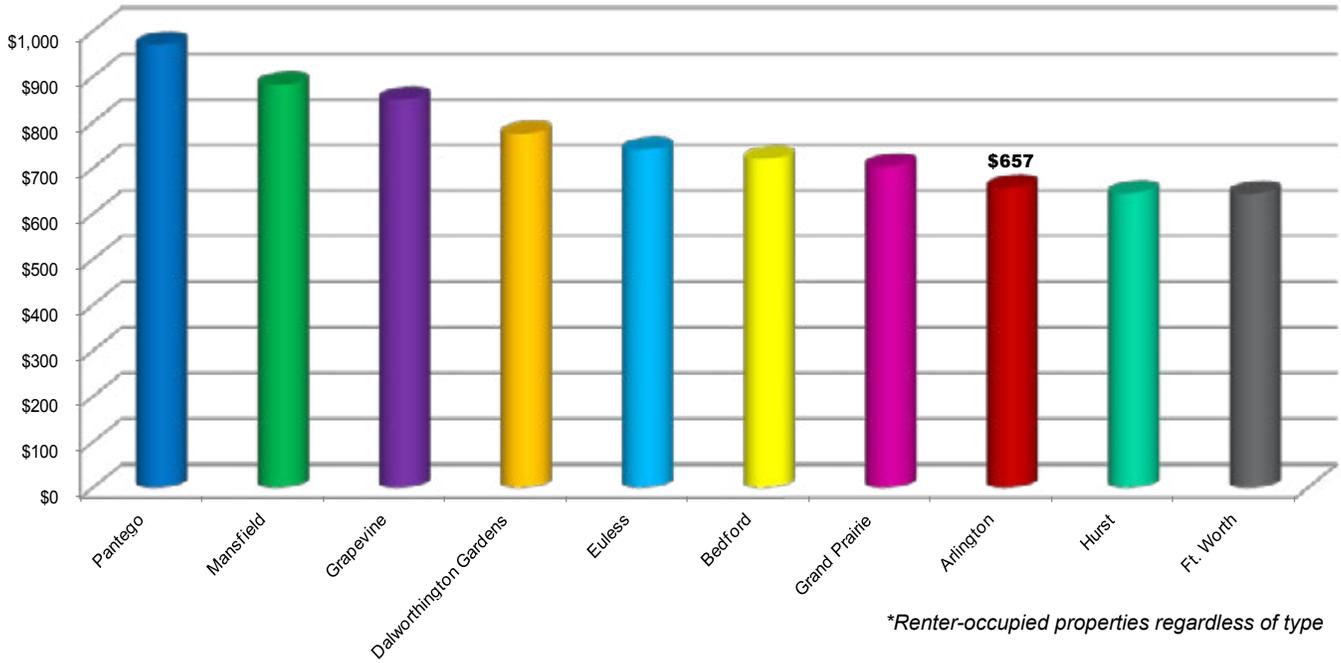
Square Footage of Multi-Family Living Area Per 1,000 Persons



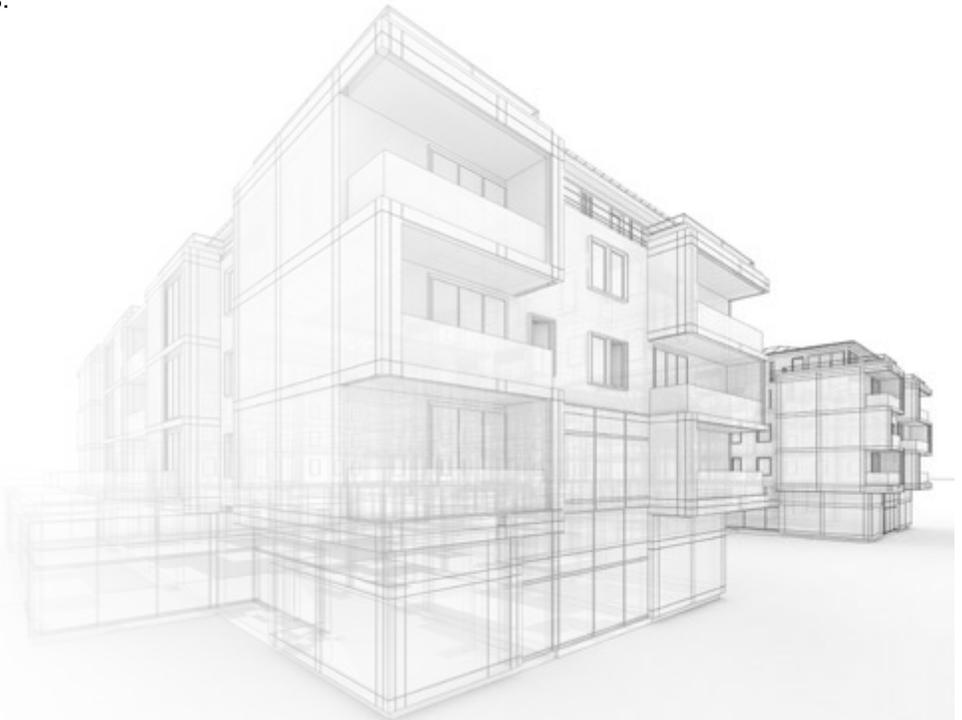
Average Total Value Per Living Area Square Footage



Median Contract Rent, 2011



The City of Arlington has a relatively large amount of multi-family housing available to its residents; however that housing is of lower assessed value and inexpensive to rent as compared to surrounding cities.

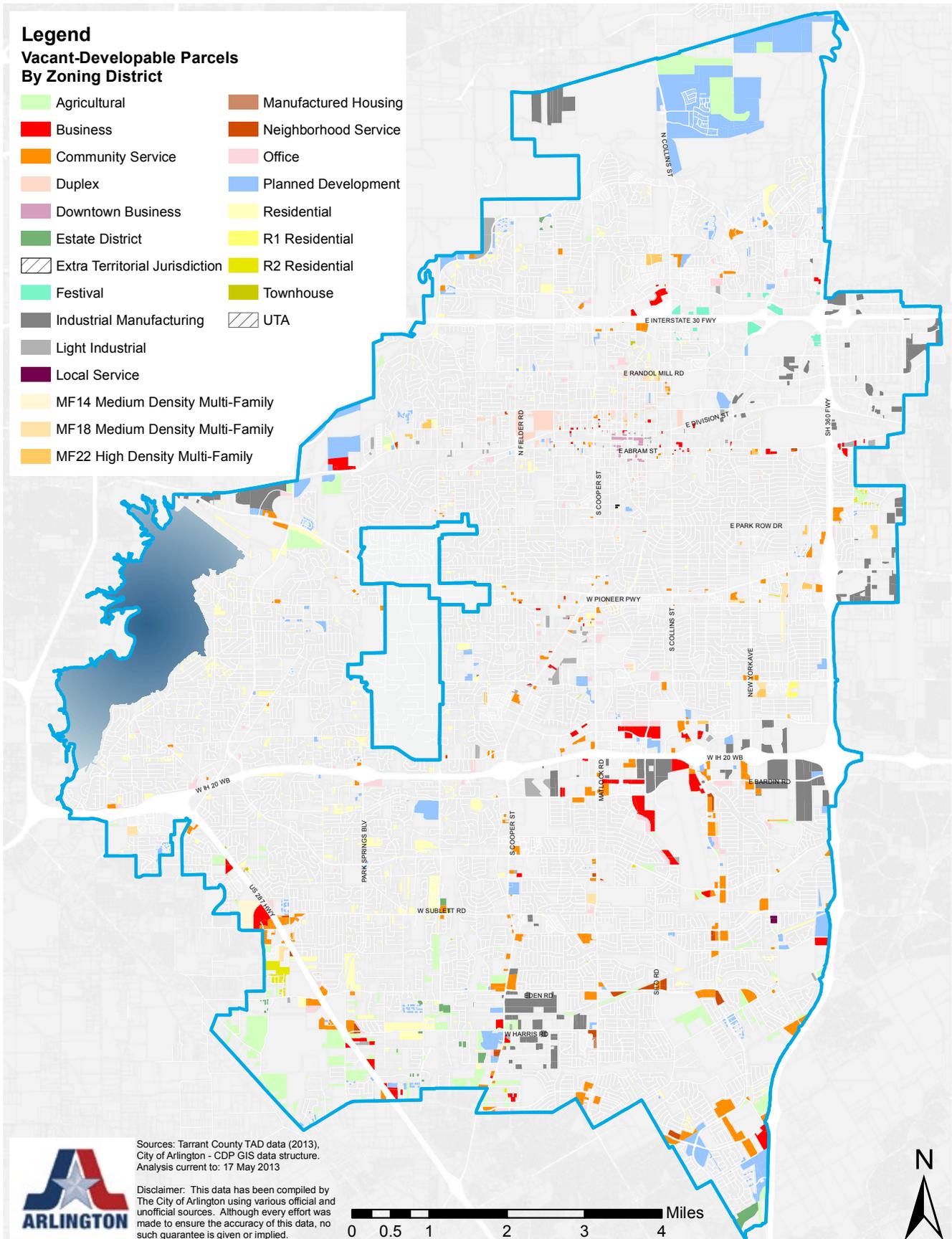


HOUSING POTENTIAL

Legend

Vacant-Developable Parcels By Zoning District

- | | | | |
|--|----------------------------------|--|----------------------|
| | Agricultural | | Manufactured Housing |
| | Business | | Neighborhood Service |
| | Community Service | | Office |
| | Duplex | | Planned Development |
| | Downtown Business | | Residential |
| | Estate District | | R1 Residential |
| | Extra Territorial Jurisdiction | | R2 Residential |
| | Festival | | Townhouse |
| | Industrial Manufacturing | | UTA |
| | Light Industrial | | |
| | Local Service | | |
| | MF14 Medium Density Multi-Family | | |
| | MF18 Medium Density Multi-Family | | |
| | MF22 High Density Multi-Family | | |



Sources: Tarrant County TAD data (2013),
City of Arlington - CDP GIS data structure.
Analysis current to: 17 May 2013

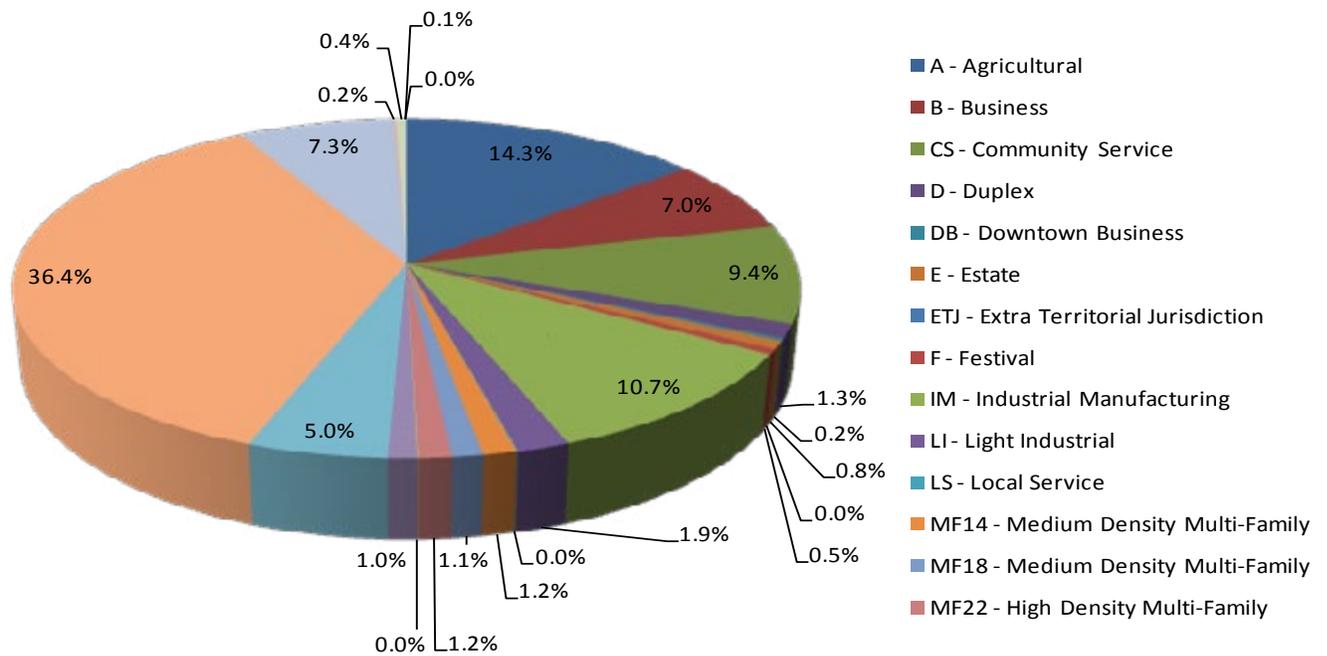
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0 0.5 1 2 3 4 Miles

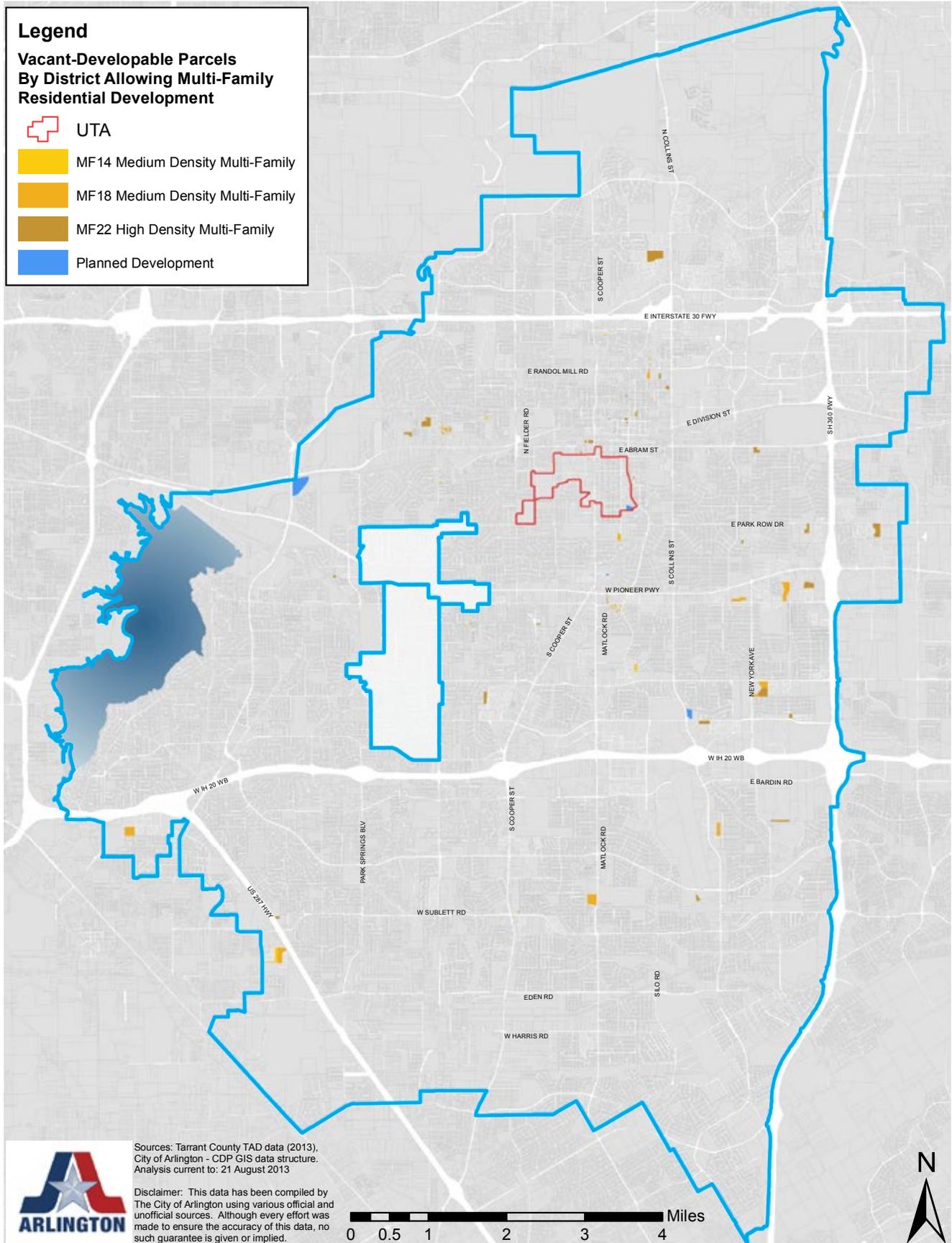


Vacant Developable Parcels by Zoning District

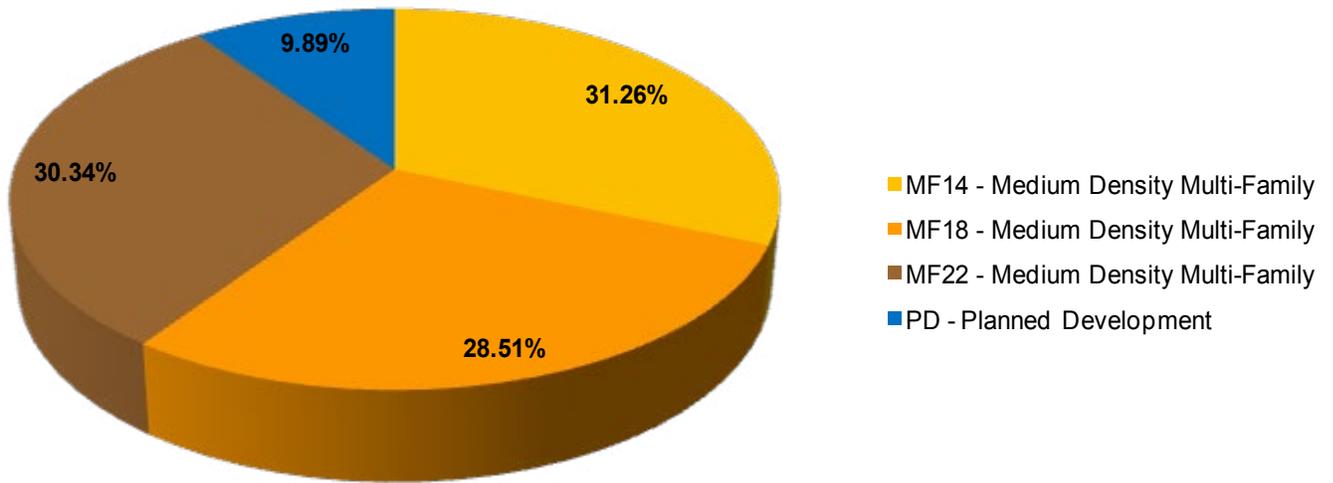


ZONING DISTRICT	NUMER OF PARCELS	TOTAL ACREAGE	PERCENT OF TOTAL
A - AGRICULTURAL	217	1,595.8	14.3%
B - BUSINESS	126	782.3	7.0%
CS - COMMUNITY SERVICE	308	1,047.5	9.4%
D - DUPLEX	142	150.7	1.3%
DB - DOWNTOWN BUSINESS	35	26.7	0.2%
E - ESTATE	35	85.3	0.8%
ETJ - EXTRA TERRITORIAL JURISDICTION	1	0.2	0.0%
F - FESTIVAL	24	56.2	0.5%
IM - INDUSTRIAL MANUFACTURING	177	1,200.1	10.7%
LI - LIGHT INDUSTRIAL	77	210.0	1.9%
LS - LOCAL SERVICE	2	5.5	0.0%
MF14 - MEDIUM DENSITY MULTI-FAMILY	15	136.2	1.2%
MF18 - MEDIUM DENSITY MULTI-FAMILY	75	123.7	1.1%
MF22 - HIGH DENSITY MULTI-FAMILY	53	132.2	1.2%
MH - MANUFACTURED HOUSING	1	3.8	0.0%
NS - NEIGHBORHOOD SERVICE	37	115.1	1.0%
O - OFFICE	121	562.6	5.0%
PD - PLANNED DEVELOPMENT	1,111	4,071.1	36.4%
R - RESIDENTIAL	847	818.6	7.3%
R1 - RESIDENTIAL	37	19.5	0.2%
R2 - RESIDENTIAL	141	46.7	0.4%
TH - TOWNHOUSE	12	5.7	0.1%
UTA	3	0.6	0.0%
TOTAL	3,598	11,196	100.0%

HOUSING POTENTIAL

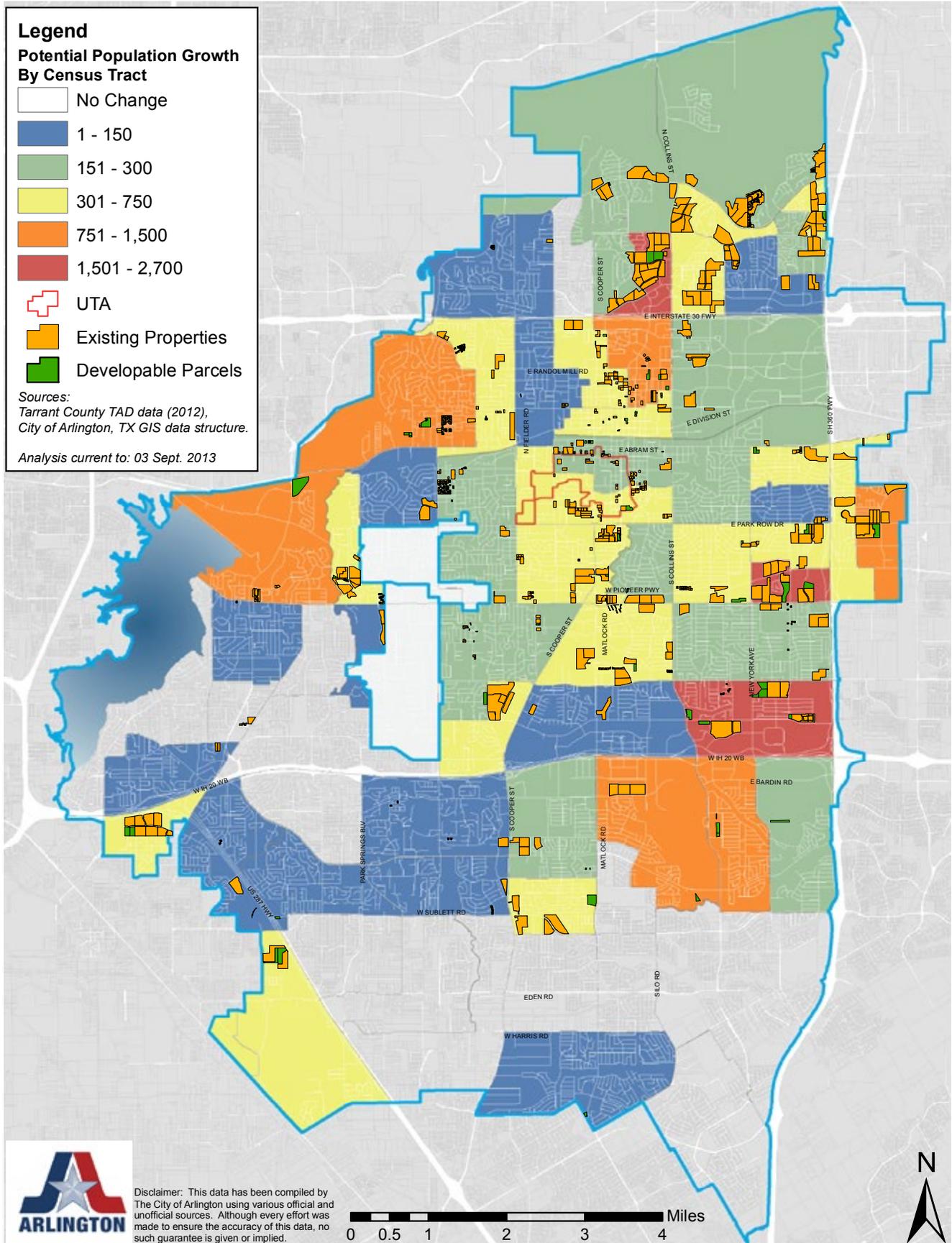


Vacant Developable Parcels by District Allowing Multi-Family Residential Development



ZONING DISTRICT	NUMER OF PARCELS	NEW UNIT COUNT (ESTIMATE)	TOTAL ACREAGE	PERCENT OF TOTAL
MF14 - MEDIUM DENSITY MULTI-FAMILY	15	1,904	136	31.26%
MF18 - MEDIUM DENSITY MULTI-FAMILY	75	1,897	124	28.51%
MF22 - MEDIUM DENSITY MULTI-FAMILY	53	2,471	132	30.34%
PD - PLANNED DEVELOPMENT	10	1,087	43	9.89%
TOTAL	153	7,359	435	100.0%

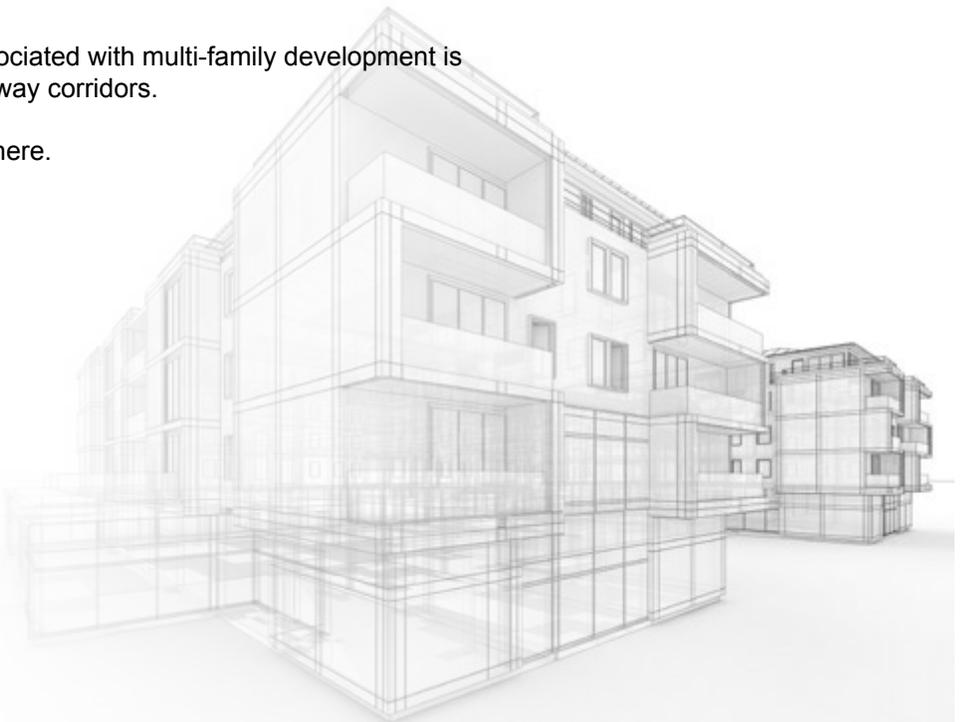
HOUSING POTENTIAL



If existing vacant multi-family parcels are developed, and occupancy rates for existing and new multi-family housing stock reach 100%, significant additions to the City's population are expected.

Potential for large population growth associated with multi-family development is located near the City's edges along highway corridors.

There is limited additional growth elsewhere.



HOUSING POLICIES

MULTI-FAMILY DEVELOPMENT REQUIREMENTS: BASE ZONING DISTRICTS							
	MF14 Multifamily 14 DUA	MF18 Multifamily 18 DUA	MF22 Multifamily 22 DUA	MU* Mixed Use	DB Downtown Business	ED-F Festival	PD** Planned Development
What is allowed?	Multi-family at a maximum of 14 units per acre ; must follow guidelines for Final Development Plan	Multi-family at a maximum of 18 units per acre; must follow guidelines for Final Development Plan	Multi-family at a maximum of 22 units per acre; must follow guidelines for Final Development Plan	Multi-family at a maximum of 100 units per acre with certain conditions (as part of a mixed-use development with design standards). MU zoning is intended for target areas of Downtown.	Multi-family at a maximum of 32 units per acre, must follow MU design standards	Multi-family allowed with SUP; SUP governs density	Uses are identified and approved as part of the PD approval process; density based on the base district chosen, can be applied anywhere in city in any overlay
What is the development process?	Must submit Final Development Plan which is approved by P&Z/CC (since May 2003)					Must obtain SUP, Must submit Final Development Plan which is approved by P&Z/CC	Must submit zoning application for PD along with Final Development Plan, both of which are reviewed and approved by P&Z/Council
What design standards apply?	<p>Final Development Plan includes review of: lot coverage and setbacks, height restrictions, landscaping, screening, minimum living area, building scale and architecture, signs, parking, open space, residential adjacency considerations, roof pitch, utilities, enhanced entrances, lighting, disposal, fencing, exterior materials, crime prevention, nonsmoking areas, on site management, orientation and clustering, natural features, circulation, pathways, tenant services, recreational facilities, laundry</p> <p>*Mixed Use District Design Standards regulate the following: minimum and maximum setbacks, encroachments into setbacks, maximum density (up to 100 units per acre with 15% non-residential component condition met), 750 sq. ft. average minimum living area per unit, open space, maximum number of stories (8), building materials, roofing design/materials, building orientation, entry features, features and massing, streetscape improvements, perimeter fencing, parking,.</p> <p>**Properties zoned PD-CA (Commercial Adjacency) have special provisions related to screening and transitional buffers. These are typically properties in a more commercial area that have been zoned to a residential use, including multifamily. The burden for protecting the residential use then falls to the PD-CA zoned property, not the pre-existing commercial uses that would be negatively affected by the introduction of a residential use adjacent to their property.</p>						

MULTI-FAMILY DEVELOPMENT REQUIREMENTS: OVERLAY DISTRICTS

	DN Downtown Neighborhood	LCMU Lamar Collins Mixed Use	ED Entertainment District	BP Business Park	VG Tierra Verde
What is allowed?	Multi-family is allowed in base districts (MF14,18, 22) or in PD and can follow regular Final Development Plan standards or MU standards	Multi-family allowed in MF18, MF22, and PD; can go up to 50 units per acre as part of mixed use development. New single-use MF complexes are not allowed.	Multi-family allowed in MF14, MF18, MF22 or PD	Multi-family allowed in MF18, MF22 or PD	Multi-family not allowed except in PD
What is the development process?	Must submit Final Development Plan which is approved by P&Z/CC (since May 2003)				Must submit zoning application for PD along with Final Development Plan, both of which are reviewed and approved by P&Z/Council
What design standards apply? What additional things above and beyond the Final Development Plan Standards will be reviewed, or are reviewed in greater detail?	Developer can choose to follow regular standards for MF14, MF18, or MF22 per the Final Development Plan standards OR they can follow the MU district design standards.	LCMU Standards govern setbacks, intrusions, living area (minimum 600 sq ft), common open space, open space amenities, stories (max 6), building materials, roof pitch, garages, building orientation and site design, streetscape improvements, landscape, screening, parking, signage	ED standards govern open space, bike parking, signage, building materials, entries, colors, visual continuity, architectural features, streetscape, landscaping	Follow regular standards for base zoning per Final Development Plan requirements	Follow regular standards for base zoning per Final Development Plan requirements

HOUSING POLICIES

MULTI-FAMILY POLICY REVIEW									
	Remain a predominantly low-density, single-family community	Prohibit or severely restrict new MF development	Implement Design Standards	Restrict Density to Specific DUA	Encourage Rezoning of Vacant MF Property	Encourage Development of MF near UTA/ Downtown	Improve Code Compliance	No additional MF Zoning over 9 units per acre in specific areas	Ensure compatibility with surrounding land uses
1992 Comprehensive Plan	✓	✓	✓		✓	✓			✓
1996 Housing Goals and Policies	✓	✓	✓	✓	✓	✓	✓	✓	✓
East Sector Plan (1998)	✓	✓	✓		✓	✓	✓	✓	✓
Central Sector Plan (1998)	✓					✓			
Southeast Sector Plan (1998)	✓	✓	✓	✓					
North Sector Plan (1999)	✓							✓	
Southwest Sector Plan (2001)	✓	✓	✓	✓					
West Sector Plan (2001)	✓			✓					
Downtown Master Plan (2004)	✓					✓			
Arlington Housing Needs Analysis (2004)						✓			

Data Sources and Support Materials

- U.S. Census, American Community Survey, American Housing Survey, and US Department of Housing and Urban Development
- Tarrant Appraisal District (TAD)
 - All multi-family properties
 - 2012 appraised values
 - 10 comparison Tarrant County cities
- City of Arlington Community Development & Planning
- MPF Research



