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## Affordable and Mixed-Income TOD Housing Study Eastern Pima County

Prepared for the Drachman Institute, University of Arizona  
May 19, 2014



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Dear Ms. Robinson:

I am pleased to submit this Affordable and Mixed-Income TOD Housing Study for Eastern Pima County to you. It has been a pleasure working with the Drachman Institute's capable staff and we look forward to keeping in touch as the High Capacity Transit planning process moves forward. Please don't hesitate to contact me or BAE staff with any questions or comments regarding this report.

Sincerely,



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# EXECUTIVE SUMMARY

## Housing Market Existing Conditions

Eastern Pima County is home to just under one million residents; roughly two-thirds of that population resides in five core population centers where High Capacity Transit (HCT) stations have been proposed – Tucson, Oro Valley, Marana, Sahuarita, and South Tucson. The rental and for-sale housing markets in the Eastern County show signs of recovery since the recession, though the market has not returned to pre-recession levels of housing production or occupancy.

Additional market and economic trend findings include:

- **Growth has slowed since 2010, but is projected to regain pace in coming decades.** Pima County added new residents at an average rate of 1.5 percent per year from 2000 to 2014, but this rate has been only 0.5 percent per year since 2010. However, State projections anticipate that population growth will proceed at an average annual rate of 1.2 percent through 2045. The most significant growth has been and is projected to occur in outlying communities of the metro area, including Marana, Oro Valley, and Sahuarita.
- **Owner households outnumber renter households, but multifamily units are making up a larger share of new housing production.** The overall ownership rate for the County is 64 percent, ranging from over 80 percent in Marana and Oro Valley to 52 percent in Tucson and just over one-third in South Tucson, the only jurisdiction with a majority of renters. However, multifamily units have accounted for between 20 and 40 percent of new housing starts each year since 2011, a much higher rate than in prior years.
- **A significant share of Pima County owner and renter households are cost-burdened.** Over half of all renter households and nearly one-third of all owner households are classified as housing cost-burdened, meaning these households pay more than 30 percent of monthly income on housing costs. In Tucson and South Tucson, between 60 percent and two-thirds of renter households are cost-burdened, while the share of renter and owner cost-burdened households in outlying communities ranges between 20 and 40 percent.
- **Three in ten Pima County workers has a regional commute; most commuters drive to work.** Roughly 30 percent of employed residents of the five population centers in Eastern Pima County commute out of their home city or town every day to go to work. Almost 90 percent drive to work, three percent take public transportation, and another six percent walk, bike, or take another mode of transportation.

## Opportunities & Constraints on TOD Affordable Housing Development

BAE conducted over one dozen interviews with both for-profit and non-profit housing developers with experience in Eastern Pima County, and Maricopa County in some cases, to understand the affordable housing development conditions in the Eastern Pima County market, including future opportunities to provide transit oriented affordable housing.

- **Demand for affordable housing development is strong.** Developers unanimously agreed that strong demand and need for new affordable housing production in the Tucson metro area exists. Relatively low wages, the impact of post-recession foreclosures on former owner households, and large amounts of aged and distressed housing in the metro area were cited as key drivers of this demand.
- **Most affordable housing comes in the form of 100-percent affordable developments.** In such developments, all units are income-restricted, typically targeting households making between 40 and 60 percent of Area Median Income (AMI). In particular, age-restricted senior affordable housing is common in the region.
- **Experience with vertical mixed-use development is limited, but developers expressed an interest in pursuing this product type.** Vertical mixed-use projects refer to those in which multiple uses are included on different levels of a single building, typically retail and parking with housing above. These projects can allow for higher housing density, especially near transit, that can be essential in supporting affordable housing development. Though experience with this product type is limited in the region, many developers expressed an interest in pursuing this kind of project in the future.
- **Transit accessibility is seen as an advantage by housing developers.** Most market rate and affordable housing developers expressed a preference for developing rental housing near transit, typically bus lines. Transit accessibility is seen as a plus because it offers access to employment centers, neighborhood amenities, and services. Such access was a particular concern for affordable housing developers.
- **Access to capital, land acquisition costs, and unfavorable zoning regulations are the primary hurdles to affordable housing developers.** Developers expressed difficulty in finding sites that could be acquired at a price that would support affordable rental rates. Financing can also be difficult to assemble for these projects and zoning or parking requirements that make it difficult to build at cost-effective density levels were also cited as impediments to affordable housing production.

## Transit Oriented (TOD) Housing Demand

Significant demand for TOD housing opportunities – both rental and ownership – exists in Eastern Pima County today, and this demand is projected to increase over 30 years. Market rate housing units, especially new units, will be unaffordable to a substantial share of these TOD demand households, especially to renter households seeking to locate near transit.

- **A significant number of current and future households will seek transit oriented development (TOD) housing opportunities.** An estimated 64,500 existing households have a preference for housing opportunities with easy access to transit. Over 30 years, the Eastern County will see TOD housing demand from an additional 31,200 households, for a total 30-year demand of nearly 96,000 households.
- **Renters make up the bulk of TOD demand households.** Renter households account for over two-thirds of existing and future TOD housing demand in the Eastern County. Among existing TOD demand households, 43,900 are renter households, while 20,500 additional renter households are projected to seek TOD housing options over 30 years.
- **Elderly households make up about a quarter of the TOD housing demand.** An estimated 12,500 existing elderly households (those with a householder over age 65) have a preference for housing options with good transit access. An additional 10,400 elderly households with TOD housing preference are projected by 2045, for a total 30-year TOD housing demand of 22,900 elderly households. The proportion of TOD demand households that are elderly is projected to increase in time, rising from less than 20 percent of the total demand in 2015 to nearly one quarter by 2045.
- **More than three-quarters of renter households with TOD demand have below-moderate income.** Nearly 60 percent of TOD demand renter households are projected to earn less than 50 percent of the Area Median Income (AMI), and an additional 20 percent of renter TOD demand households will make between 50 and 80 percent AMI; households making below 80 percent of AMI are considered to have below-moderate income. Among owner households, nearly half of all TOD demand households will have below-moderate income.
- **Most TOD demand renter households cannot afford to rent at or above the market rate.** At least 25,800 renter TOD demand households, and as many as 34,300 cannot afford to rent at or above the market rate. Over 30 years, a total of between 38,400 and 50,800 TOD demand households will not be able to afford market rental rates. This accounts for between 60 and 80 percent of all TOD demand renter households.
- **A significant share of new affordable for-sale housing would have to be built at TOD sites to meet demand.** Nearly half of all new for-sale housing units affordable to households with below-moderate income (earning less than 80 percent AMI) would have to be built at TOD sites to meet the projected 30-year demand of 14,000 affordable TOD buyer households.

## Prioritization of Station Areas

BAE evaluated the development potential of 24 proposed High Capacity Transit (HCT) station areas presented in the Pima Association of Governments (PAG) High Capacity Transit System Plan throughout the Eastern County. Proposed station areas were ranked as near-, mid-, or long-term development priority sites, based on each station area's relative suitability for affordable or mixed-income TOD housing development. In keeping with the 2009 Capacity Transit (HCT) System Plan developed by PAG, near-, mid-, and long-term priority sites refer to sites that should be prioritized for TOD housing development in the coming 10, 20, or 30 years, respectively.

- **Seven station areas were ranked as near-term priorities for TOD housing development.** These stations represent the proposed station areas at which affordable or mixed-income TOD housing development would most effectively address the demand for affordable TOD housing options demonstrated in this report in the near term.
- **Near-term priority stations are concentrated in the metro region's core.** All seven near-term priority station areas are located in central Tucson and South Tucson. This does not suggest that TOD housing development at proposed station areas in more outlying areas of the metro region are unviable, but reflects the increased access to employment and transit options and more challenging affordable housing market present in the region's urban core.
- **Relatively dense, multifamily affordable housing development should be the priority for near-term TOD development sites.** The proposed station areas ranked as near-term priorities are the best suited to meet the affordable TOD housing demand demonstrated in this report. Special consideration should be given as development is proposed for these sites to ensure that these high priority sites are used to effectively support the region's affordable TOD housing goals.



# INTRODUCTION

## Study Purpose & Organization

The Pima Association of Governments (PAG) developed a High Capacity Transit (HCT) System Plan for the region in 2009 that was incorporated into the 2040 Regional Transportation System Plan in 2012. Proposed HCT corridors are intended to carry high volumes of passengers with fast and reliable service throughout the region.

The Drachman Institute is collaborating with public and private agencies and organizations and the Arizona Department of Housing (ADOH) to plan for transit infrastructure and transit oriented development (TOD) to provide residents with increased options for mobility and a broader range of choices for living and working in areas served by transit. A key element of this effort is to plan for affordable and mixed-income housing near transit to serve residents at all income levels and support regional economic development goals.

BAE has been retained as a subconsultant to the Drachman Institute under a contract with ADOH to conduct a study of affordable and mixed-income TOD housing demand in Eastern Pima County. This report presents findings regarding the existing conditions of the region's housing market, a projection of the current and future Eastern County households most likely to seek affordable housing opportunities near transit over 30 years, and an evaluation of proposed HCT station areas for affordable or mixed-income TOD housing development suitability. This report concludes with several recommendations based on these findings to inform policy discussions and guide future analysis.

## Defining Affordable and Mixed-Income TOD Housing

Transit oriented development (TOD) is a broad term that encompasses many forms of development that occur in close proximity to a high-capacity transit station (e.g. bus rapid transit, streetcar, light rail, or commuter rail stations), typically within a half-mile. TOD that takes the form of relatively dense, and often mixed-use, housing or commercial development is widely seen as a key tool in increasing transit ridership and attracting development to infill sites at strategic locations within a community or region. The TOD approach is also generally recognized as a means of increasing value for both existing property owners in proximity to a TOD site and for potential developers of such sites, compared to other types of developments.

Affordable housing in this report refers to housing units that are income-restricted so that only households making certain levels of income may rent or purchase the housing unit. Affordable housing rental units are often produced in projects where all units are designated as affordable; these developments are referred to as 100-percent affordable developments. Affordable housing that is age-restricted for senior residents is a common type of affordable housing. Mixed-income housing simply refers to housing developments in which some units are income-restricted and others are rented or sold at the market rate.

# EXISTING HOUSING MARKET CONDITIONS

This chapter provides an overview of the existing demographic and housing market conditions in Eastern Pima County, with a particular focus on the constraints and opportunities for affordable housing development in the area. Data reported in this chapter is presented for Pima County as a whole, as well as for the Cities of Tucson and South Tucson, and the Towns of Oro Valley, Marana, and Sahuarita. These five jurisdictions represent the Eastern County's core population centers in which High Capacity Transit (HCT) stations are proposed; these jurisdictions will be referred to collectively as Eastern Pima County in this chapter for ease of reference, though significant development is also present in unincorporated portions of the Eastern County.

Demographic data – such as population and household figures – reviewed in this chapter include data from the 2000 and 2010 decennial Census, and 2014 estimates produced by Nielsen Site Reports, a nationally recognized demographic analytics service, based on data from the American Community Survey (ACS) and decennial Census. Long-term projections reflect those prepared by the Arizona Department of Administration (ADOA) and published by the Pima Association of Governments (PAG).

Current housing market conditions are described based on data from the American Community Survey (ACS); Tucson Realtors Association Multiple Listing Service (MLS); DataQuick, a national firm providing sales data from County Assessor records; RealFacts, a national multifamily housing analytics firm; and on market information gathered by BAE between January and March 2014.

Findings related to affordable housing market constraints and opportunities are derived from a series of in-depth interviews conducted by BAE with housing developers and non-profits active in the Pima and Maricopa County markets. See Appendix B for a full list of interviewees.

## Population and Household Trends

Pima County is a growing area with wide variation in household growth and income across communities. Nearly one in three employed County residents commute out of their home city or town every day to go to work, though fewer than 10 percent commute via transit, bicycle, or walking.

**Nearly two-thirds of Pima County residents live in the core Eastern County population centers.** Pima County is home to 999,461 residents in 396,111 households as of 2014. The five core population centers of Eastern Pima County – Tucson, Oro Valley, Marana, Sahuarita, and South Tucson - comprise 639,698 of those residents in 252,255 households, or nearly two-thirds of the County total.

**The average household in Pima County has between two and three persons.** Average household size as of 2014 ranges between 2.32 and 2.91 persons per household across the Eastern County and averages 2.46 persons per household countywide.

**Table 1: Population and Household Trends, 2000-2014**

<b>Area</b>	<b>2000</b>	<b>2010</b>	<b>2014 (a)</b>	<b>Total Growth 2000-2014</b>	<b>Avg. Annual Growth 2000-2014</b>	<b>2010-2014</b>
<b>Pima County</b>						
Population	843,746	980,263	999,461	18.5%	1.2%	0.5%
Households	332,350	388,660	396,111	19.2%	1.3%	0.5%
Avg. household size	2.47	2.46	2.46			
<b>Tucson</b>						
Population	486,699	520,116	524,264	7.7%	0.5%	0.2%
Households	192,891	205,390	208,167	7.9%	0.5%	0.3%
Avg. household size	2.42	2.43	2.41			
<b>Oro Valley</b>						
Population	29,700	41,011	42,391	42.7%	2.6%	0.8%
Households	12,249	17,804	18,201	48.6%	2.9%	0.6%
Avg. household size	2.41	2.30	2.32			
<b>Marana</b>						
Population	13,556	34,961	38,925	187.1%	7.8%	2.7%
Households	4,944	13,073	14,232	187.9%	7.8%	2.1%
Avg. household size	2.66	2.63	2.71			
<b>Sahuarita</b>						
Population	3,242	25,259	28,619	782.8%	16.8%	3.2%
Households	1,155	9,020	9,883	755.7%	16.6%	2.3%
Avg. household size	2.78	2.79	2.89			
<b>South Tucson</b>						
Population	5,490	5,652	5,499	0.2%	0.0%	-0.7%
Households	1,810	1,827	1,772	-2.1%	-0.2%	-0.8%
Avg. household size	2.94	2.93	2.91			

Notes:

(a) Figures for 2014 reflect estimate provided by Nielsen; figures may not correspond precisely with population projection figures generated by other sources.

Sources: US Census, 2000, 2010; Nielsen, 2014; BAE, 2014.

Pima County grew significantly from 2000 to 2014, but growth has slowed since 2010. As indicated in Table 1, between 2000 and 2014 Pima County’s population increased by 155,715 residents representing a total increase of 19 percent. Much of this growth can be attributed to jurisdictions in Eastern Pima County, especially Oro Valley, and Marana and Sahuarita, where the population more than doubled since 2000. However, since 2010 growth has slowed; Pima County population increased by an average 0.5 percent per year, compared with the 1.2 percent annual growth rate since 2000.

Despite recent slow growth, Pima County is projected to increase in population and households significantly by 2040. According to State projections, as indicated in Table 2, Pima County is expected to grow 31 percent by 2040. The jurisdictions showing the greatest amount of growth over this time period include Sahuarita, Marana, and Tucson. Sahuarita and Marana are projected to nearly double their current population over this time period.

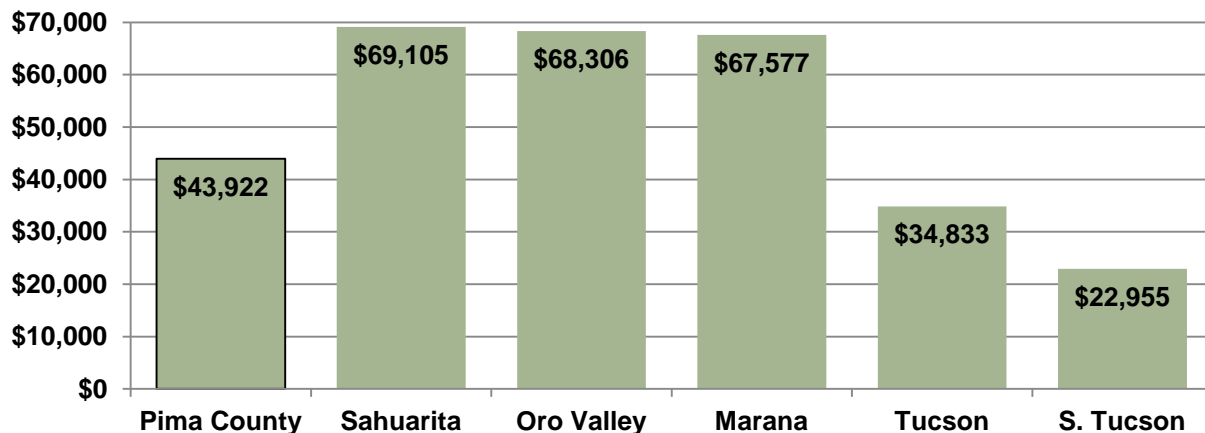
**Table 2: Population Projections, 2014-2040**

Area	2015	2020	2025	2030	2035	2040	2045	Total Growth 2015-2045	Avg. Annual Growth 2015-2045
Pima County	1,022,079	1,022,079	1,100,021	1,172,515	1,243,099	1,312,101	1,447,403	41.6%	1.2%
Tucson	537,129	537,129	572,636	610,374	647,118	683,038	753,472	40.3%	1.1%
Oro Valley	42,259	42,259	44,811	47,405	49,784	52,072	56,453	33.6%	1.0%
Marana	41,019	41,019	48,324	55,287	61,988	68,859	82,714	101.6%	2.4%
Sahuarita	28,483	28,483	34,529	41,276	45,403	48,527	54,729	92.1%	2.2%
South Tucson	5,670	5,670	5,637	5,585	5,550	5,544	5,727	1.0%	0.0%

Sources: ADOA, 2012; PAG, 2012; BAE, 2014.

Median household income is highest in the Towns of Sahuarita, Oro Valley, and Marana. Figure 1 shows the range in incomes across the Eastern County. Pima County has an average median household income of \$43,900. Sahuarita has the highest median income of \$69,100, followed by Oro Valley and Marana at \$68,300 and \$67,577, respectively. South Tucson has the lowest median household income, at \$23,000.

**Figure 1: Median Household Income, 2014**



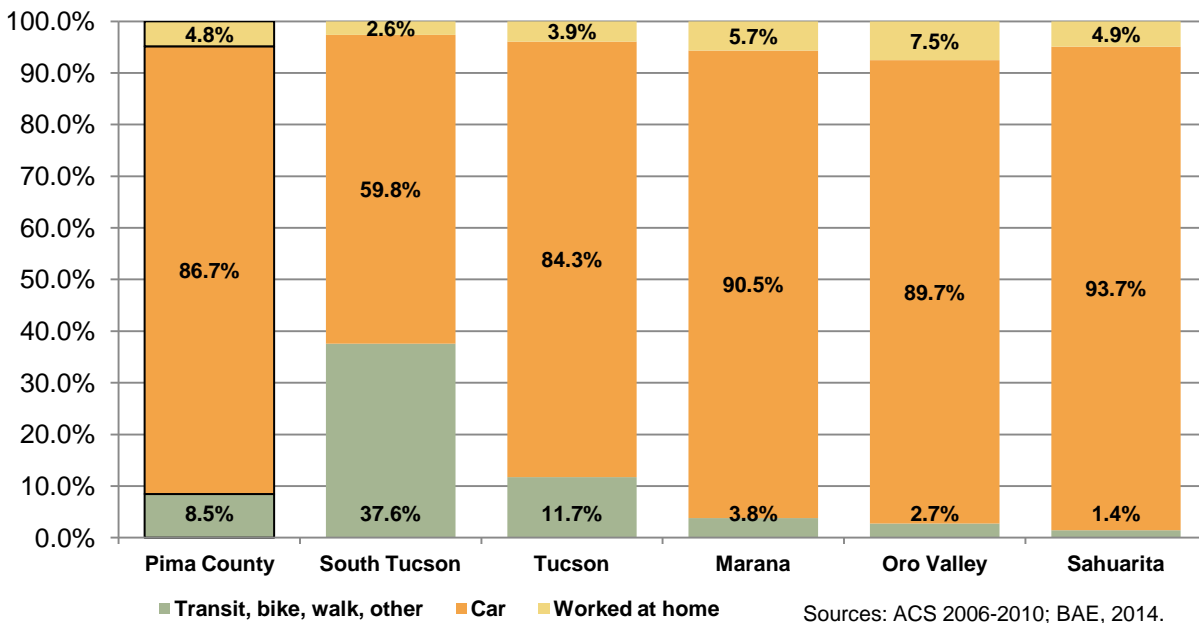
Sources: Nielsen, 2014; BAE, 2014.

Nearly 400,000 Pima County residents commute to work every day, mostly in personal vehicles. Of all employed Pima County residents, 87 percent drive to work. Three percent take public transportation, and another six percent walk, bike, or take another mode of transit. In Oro Valley, Marana, and Sahuarita, the share of commuters who drive is even higher than the County average, between 90 and 94 percent.

Three in ten employed residents in Eastern Pima County have a regional commute. Roughly 30 percent of employed residents of the five population centers in Eastern Pima County commute out of their home city or town every day to go to work. One in five employed Tucson residents commute out of the City for work, while the share of employed residents in surrounding communities who commute out ranges from 75 percent in Oro Valley to 87 percent in South Tucson.

Employed residents of South Tucson are the heaviest users of public transportation. Of all employed residents in South Tucson, 60 percent drive, 14 percent take public transportation, and another 24 percent walk, bike or take another mode of transit. As seen in Figure 2, Tucson is the only other population center in the Eastern County where employed residents drive less than the County average; 84 percent drive, 4 percent take public transportation, another 8 percent walk, bike, or take another mode of transit.

**Figure 2: Means of Transportation to Work, 2010**

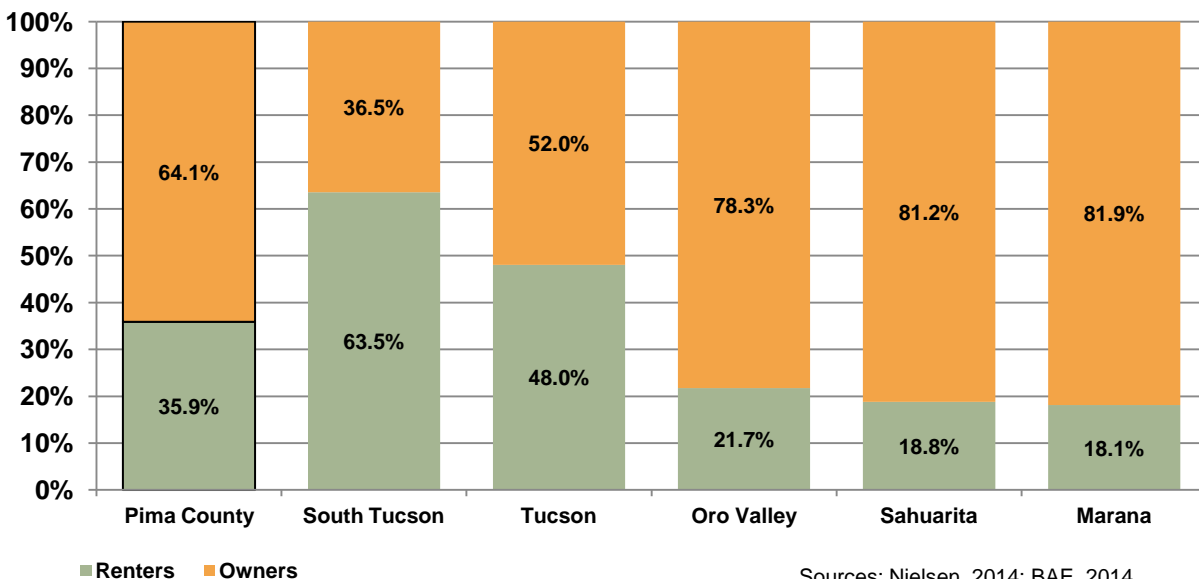


## Housing Market Conditions

The Eastern Pima County housing market is showing signs of recovery from the recession, with increasing housing starts and positive net absorption in the rental market since 2010. Owner-occupied and single-family detached homes are the dominant housing type in the area, though multifamily units have made up a significantly larger share of new units in recent years than in the past.

**Owner households outnumber renter households in all jurisdictions except for South Tucson.** The overall ownership rate for the County is 64 percent. As seen in Figure 3, Tucson and South Tucson have more renters than owners compared to other jurisdictions in Eastern Pima County. In Oro Valley, Marana, and Sahuarita less than a quarter of households rent.

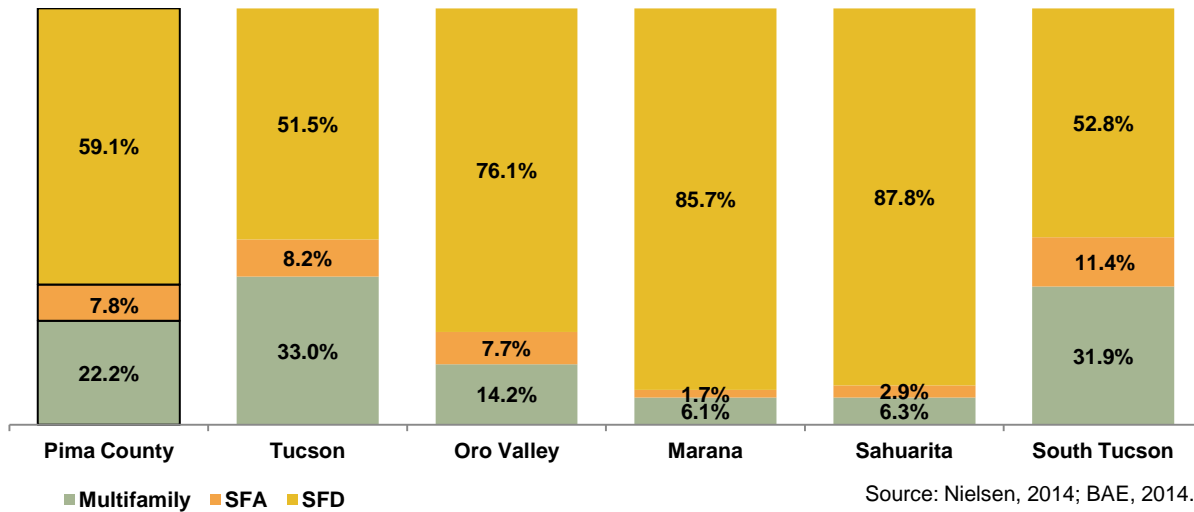
**Figure 3: Household Tenure, 2014**



**Single-family homes are the dominant type of housing unit in Pima County.** Overall, 60 percent of housing units in Pima County are single-family detached units, while an additional eight percent are single-family attached units (e.g. condominium or townhouse style homes). Less than one-fourth of Pima County housing units are in multifamily buildings.

**Multifamily housing units make up a significant share of the housing stock in Tucson and South Tucson.** Both Tucson and South Tucson have a significantly higher share of multifamily housing units compared with the Eastern Pima County communities and with the County as a whole. Roughly one-third of housing units in each city are in multifamily buildings.

**Figure 4: Housing Units by Type of Structure, 2014**



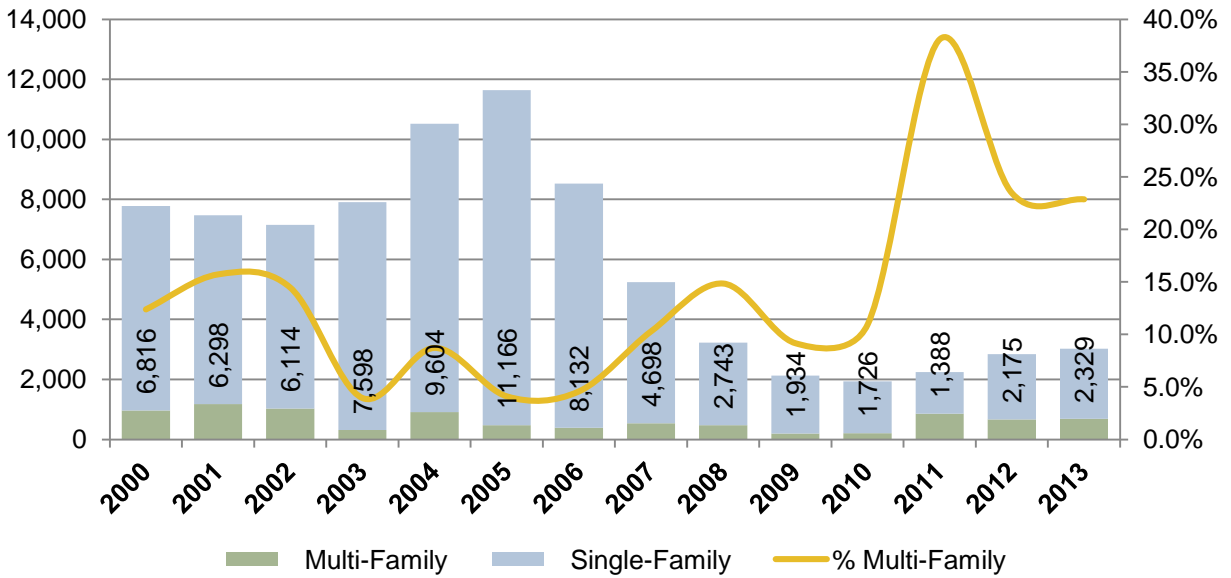
**Housing construction has begun to pick up since 2011, though new starts are still well below pre-Recession levels.** After a sharp decline in new home starts following the recession, the number of new housing units built in Pima County increased from the prior year since 2011. In 2013, more than 3,000 new units began construction, of which over 20 percent were multifamily units, still well below the housing market peak of 11,600 units in 2005.

**New housing construction is concentrated in the core population centers of the County.** More than 70 percent of all 2013 housing starts in Pima County were in the five Eastern Pima County population centers. All 700 multifamily housing units that began construction in the County in 2013 were in these jurisdictions.

**Multifamily units have played a much larger role in new housing construction since the recession.** Since 2011, multifamily units have accounted for between 20 and 40 percent of all new housing starts in Pima County. This is a significantly higher share than the average 10 percent of new housing units that were multifamily in each year from 2000 to 2010. A total of more than 2,400 new multifamily units commenced construction between 2010 and 2013.



**Figure 5: Building Permits Issued, Pima County, 2000 - 2012**



Source: U.S. Census Bureau, Building Permit Trends; BAE, 2014.

**Rental Market Overview**

Asking rental rates for apartments in Eastern Pima County have held relatively constant through the recession and have increased every year since 2010, nearing pre-recession levels. Absorption of new and existing rental units in the market has also been positive since 2010, and the total net absorption since 2005 is just positive, indicating modest recovery since the recessionary downturn.

**Most rental units are one- and two-bedroom units.** Nearly 90 percent of all rental units are one- and two-bedroom units, according to a sample of nearly 43,000 rental units in 175 Eastern Pima County projects surveyed in the fourth quarter of 2013. These units range in average size between 600 and 917 square feet, respectively,

**Table 3: Rental Market Overview, Eastern Pima County Sample, 4<sup>th</sup> Quarter 2013**

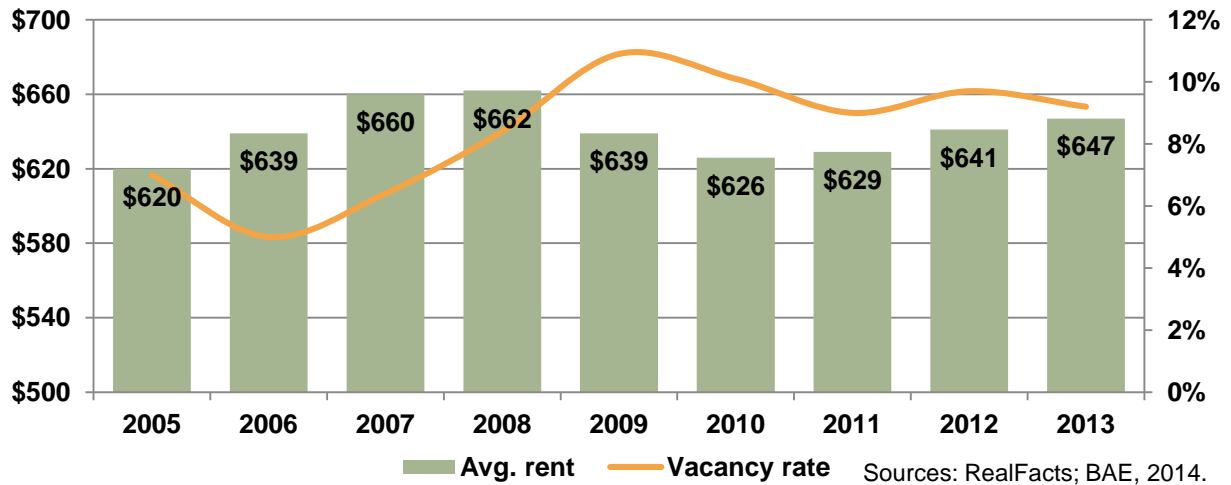
	<b>Avg. Rental Rate</b>	<b>Avg. Unit Size (sq. ft.)</b>	<b>Number of Units</b>	<b>% Total Units</b>
Studio	\$437	397	2,087	4.9%
1-Bedroom	\$555	600	21,836	50.8%
2-Bedroom	\$739	917	16,049	37.4%
3-Bedroom	\$918	1,122	2,592	6.0%
4-Bedroom	\$1,310	1,328	394	0.9%
<b>Total</b>	<b>\$647</b>	<b>873</b>	<b>42,958</b>	<b>100.0%</b>

Notes:  
 Figures reflect data from the fourth quarter of 2013 for a sample of existing apartment rental units in Eastern Pima County provided by RealFacts.

**Since 2005, rents have remained relatively stable and are approaching pre-recession levels.** Since the height of the region’s housing boom in 2005, rents have fluctuated, but remained within a relatively tight band. The average asking rental rate in Eastern Pima County in 2013 was \$647 per month, only slightly less than the average rate in 2008, when rents reached a high point of \$662 per month across all unit types.

**Vacancy has declined gradually since 2009, but remains higher than pre-recession levels.** The overall vacancy rate for multifamily rental units at the end of 2013 was 9.6 percent. This level is significantly higher than the 5 percent vacancy rate that is considered stable in most markets. Vacancy was last at this level in 2006, at the height of the housing boom. This high apartment vacancy rate may also be affected by competitive supply available in single family rentals due to foreclosures.

**Figure 6: Multifamily Rental Rates and Vacancy Trends, Eastern Pima Co., 2005 - 2013**



The average year built for multifamily buildings in Eastern Pima County is 1984. The sampled units were in buildings built between 1961 and 2012, meaning that average rental rates and units sizes in the market reflect units that are 30 years old. In order to look at where newer properties are trending in terms of rent and size of unit, a set of recent comparables is listed in Table 4.

Since 2011, new rental units are larger and renting for higher rates. Compared to averages for the overall market, units opening since 2011 are renting at much higher rates. New one-bedroom units are renting at a premium of 60 percent over the market average; for two-bedroom and three-bedroom units, the rent premium for new units is 51 percent and 48 percent, respectively. The average size of new units is also much larger than the market average; average unit size has increased 27 percent for one-bedroom units, 14 percent for two-bedroom units, and 12 percent for three-bedroom units.

**Table 4: Recent Market Comparables, Eastern Pima County Sample, 2011-2013**

	Avg. Rental Rate (\$/mo)	Avg. Unit Size (sq. ft.)	Number of Units	% Total Units
Studio	n/a	n/a	n/a	n/a
1-Bedroom	\$898	761	394	38%
2-Bedroom	\$1,117	1,048	540	52%
3-Bedroom	\$1,356	1,253	108	10%
4-Bedroom	n/a	n/a	n/a	n/a
<b>Total/Avg.</b>	<b>\$1,124</b>	<b>1,021</b>	<b>1042</b>	<b>100%</b>

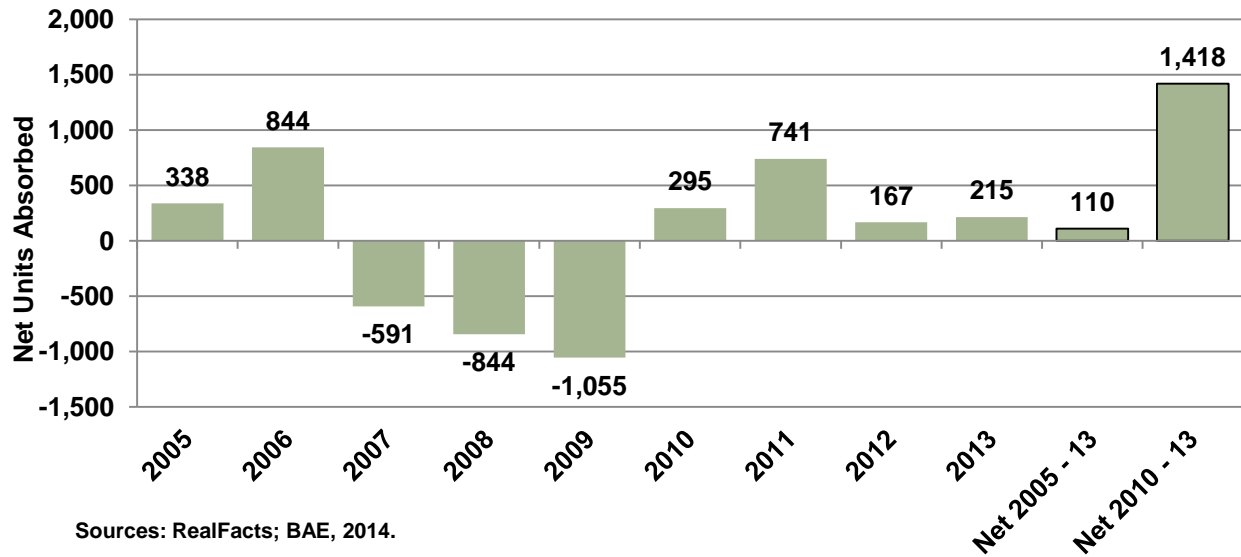
Notes:

Figures reflect projects completed between 2011 and 2013 in Eastern Pima County according to RealFacts. In this period, no studios or 4-bedroom apartments were built.

Sources: RealFacts 2014; BAE 2014

**Absorption of rental units has recovered since the recession.** Each year from 2007 to 2009, the Eastern Pima County apartment market saw net negative absorption, followed by positive absorption each year from 2010 to 2013. The total net absorption from 2005 to 2013 was a modest 110 units, while total net absorption since 2010 has been strong at 1,418 units. Note that these figures include absorption of existing (vacant) and new units.

**Figure 7: Rental Market Absorption Trends, Easter Pima County, 2005 - 2013**



### ***For-Sale Market Overview***

Re-sales of existing homes made up the majority of sales in 2013 in the Eastern County, with only a modest number of new home sales last year. Single-family homes dominate the for-sale market and new homes sold at a modest premium above the market average.

**Vacancy among owner-occupied units is relatively low.** The overall vacancy rate for owner-occupied housing units in Pima County as of the end of 2012 was estimated at 2.1 percent. In Tucson, the owner vacancy rate was a slightly higher 2.6 percent<sup>1</sup>. These rates are substantially lower than the rental unit vacancy rate observed for the same time period, which is typical in most markets where ownership housing is preferred and demand and supply are balanced. Thus, this owner vacancy rate suggests that the market has largely stabilized since the recession.

**More than 12,500 single-family, condominium, and townhouse units sold in 2013.** This figure represents data reported by the Tucson Realtors Association MLS data. Non-represented sales and most sales of new homes are not reported in MLS data, so this figure does not include all sales for the year. Nearly 90 percent of sales were of single-family units.

**Homes sold for an average of \$196,000, with single-family homes selling for more.** Single family homes sold at an average price of \$218,700, nearly 40 percent higher than the average sale price for condominium and townhouse units of \$157,500.

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**Table 5: Sale Price Distribution, Eastern Pima County, 2013 (a)**

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	<b>Single-Family Residence</b>	<b>Condominium/ Townhouse</b>	<b>Total Units</b>	<b>% Total Units</b>
Less than \$99,999	1,445	784	2,229	18%
\$100,000-\$199,999	5,002	726	5,728	45%
\$200,000-\$299,999	2,482	205	2,687	21%
\$300,000-\$399,999	981	53	1,034	8%
\$400,000-\$499,999	442	25	467	4%
\$500,000-\$749,999	370	6	376	3%
\$750,000 or more	173	0	173	1%
<b>Total</b>	<b>10,895</b>	<b>1,799</b>	<b>12,694</b>	<b>100%</b>
<b>Average Sale Price</b>	<b>\$218,715</b>	<b>\$157,485</b>	<b>\$195,953</b>	

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Notes:

(a) All figures represent sales reported to the Tucson Multiple Listing Service (MLS) in the submarket areas corresponding to the Eastern Pima County Market Area; MLS sales data do not include all real estate activity and do not include unrepresented sales or a substantial portion of new home sales.

Sources: Tucson Association of Realtors, MLS, 2013; BAE, 2014.

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<sup>1</sup> Figures reflect data available from the American Community Survey based on continuous sampling from 2010 to 2012; this data was not available for other jurisdictions in Pima County for that timeframe.

**New homes are selling at a modest premium.** Single-family residences had an average re-sale price of \$218,715, while new first time sales averaged \$232,961, a seven percent premium. There were not enough new condominium sales in 2013 to provide an accurate comparison.

**Table 6: Sale Price Distribution, Eastern Pima County,  
March 2013 – March 2014 – New Units (a)**

	<b>Single-Family Residence</b>	<b>Condominium/ Townhouse</b>	<b>Total Units</b>	<b>% Total Units</b>
Less than \$99,999	7	1	8	3%
\$100,000-\$199,999	114	0	114	43%
\$200,000-\$299,999	102	3	105	39%
\$300,000-\$399,999	23	0	23	9%
\$400,000-\$499,999	5	0	5	2%
\$500,000-\$749,999	7	1	8	3%
\$750,000 or more	3	0	3	1%
<b>Total</b>	<b>261</b>	<b>5</b>	<b>266</b>	<b>100%</b>
<b>Average Sale Price</b>	<b>\$232,961</b>	(b)	<b>\$233,642</b>	

Notes:

(a) All figures represent full and verified sales recorded by the Pima County Assessor between March 1, 2013 and February 28, 2014, as provided by DataQuick

(b) Average is not presented for new condominium sales, due to insufficient recorded sales

Sources: DataQuick, 2014; BAE, 2014.

### *Housing Market Affordability*

Housing cost burden is a standard national measure of housing affordability. As defined by the Department of Housing and Urban Development (HUD), households that spend more than 30 percent of monthly household income on housing costs (e.g. mortgage or rent payments and utilities) are considered to be cost-burdened. In Pima County, a significant portion of households are cost-burdened, though the share varies throughout the Eastern County.

**A significant share of Pima County owner and renter households are cost-burdened.** In Pima County as a whole and in all five core population centers of the Eastern County, at least one-in-five owner households and one-in-three renter households pay more than 30 percent of monthly income on housing costs.

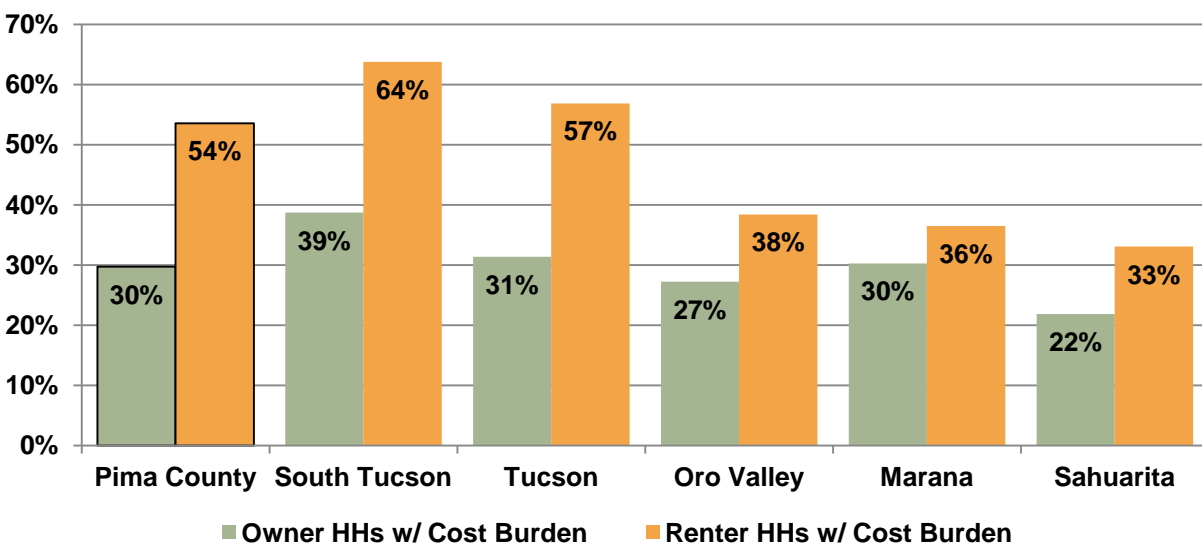
**Renter households are more cost-burdened than owner households.** Across the board, a higher share of renter households are cost-burdened than owner households. For Pima County overall, 54 percent of renters are cost-burdened, compared with 30 percent of owner households.

**Tucson and South Tucson have the highest share of cost-burdened households.** Almost two-thirds of South Tucson renter households and nearly 60 percent of Tucson renter households are cost-burdened. These shares are higher than in any other Eastern County community and higher than the County average. The share of owner households that are cost-burdened is more constant across jurisdictions, ranging from 22 percent in Sahuarita, the community with the lowest cost-burden rate for both owners and renters, to 31 percent in Tucson. An exception is South Tucson, where almost 40 percent of owner households are cost-burdened, compared with the County average of 30 percent.

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**Figure 8: Percent of Households with Cost Burden, 2012**

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Source: American Community Survey (ACS), 2008-2012; BAE, 2014.

## Opportunities & Constraints to Affordable Housing Development

In order to understand the affordable housing development conditions in the Eastern Pima County market, BAE conducted a series of interviews with both for-profit and non-profit housing developers in the region during February and early March 2014. The following section describes characteristics of the development community, and then summarizes key findings from interviews regarding the principal opportunities and constraints to affordable and mixed-use housing development in Eastern Pima County. See Appendix B for a full list of interviewees.

### *Characteristics of the Development Community*

#### Markets

Most non-profit developers interviewed work mainly within Pima County, but will occasionally do projects outside the County if approached by a municipality or other non-profit. For-profit developers primarily work in the Tucson and Phoenix metro areas. Only three firms are looking to expand outside of their current markets in the near future, with two looking out of state. However, some developers are looking to expand within their current markets by working on rehab projects, going into the private market, or adding more services for residents.

#### Projects

Project type, size, and cost range among developers depending on their mission or market niche. However, ten of the thirteen developers interviewed are or have been involved in some aspect of affordable housing development, either directly as a developer, or as a joint partner or general contractor. Additionally, nearly all of the developers interviewed are developing in the multifamily market—only three focus on single-family construction. Four of the developers also work on rehab or foreclosed properties, although these are not their primary product.

Mixed-use development is rare among non-profits, while for-profit developers pursue mixed-use development about half the time. Mixed-use projects in Eastern Pima County are mostly in the form of horizontal mixed-use (i.e. multiple buildings spread over a site), rather than vertical mixed-use (i.e. multiple uses in different levels of one or more buildings). However, many developers believe the market is heading more in this direction, and expressed an interest in completing more mixed-use projects in the future.

Development costs for each type of project range widely. Quoted per square foot (PSF) development costs ranged from \$105 to \$160 for for-sale projects, \$100 to \$204 for multifamily projects, and \$70 to \$80 for rehab projects. These quoted development costs are “all-in,” which includes land acquisition, soft costs, and hard costs of the project. Costs range due to submarket context, land acquisition cost, quality of finishes, green building standards, and type of parking (surface vs. structured).

Affordable housing developers base their project rents or mortgages on programmatic funding requirements, as described below. Market rate developers interviewed reported asking rents as low



as \$400 for a one-bedroom and as high as \$1,900 for a three-bedroom unit. For-sale units were selling between \$120,000 and \$225,000 for a typical home.

### *Affordable Projects Characteristics*

Most affordable projects completed by the interviewed developers have been rental projects. Among for-profit developers, past affordable projects were entirely rental. Among the non-profit developers, half regularly deliver affordable for-sale units, but the majority of completed affordable units have been rental. Only one non-profit developer specializes in on for-sale affordable product. Nearly all of the projects completed are 100-percent affordable projects; only two developers build mixed-income projects. Reasons for this market preference stated by developers include programmatic requirements and investors. Banks and other institutional investors prefer 100 percent affordable projects because they are easier to track from a compliance and market risk standpoint. One developer stated that mixed income projects in Tucson have also tended to overshoot the market and perform poorly because they rely too much on market rate units to make up costs.

Demographics of residents ranged widely, but most affordable units were directed towards low-income families, seniors, veterans, or other special needs populations. Nearly half of the developers interviewed have produced an age-restricted project for seniors. These projects were usually funded through HUD Section 202 financing, and are restricted to ages 55 or 62 and over. However, Congress defunded capital advances for Section 202 beginning in FY 2012 through FY 2013.<sup>2</sup> Since almost all developers in Tucson use this financing to build affordable senior projects, this may decrease the number of age-restricted units built in the near future.

Most affordable projects have targeted households earning below 80 percent of Area Median Income (AMI). Most projects provide the majority of units for households earning between 40 percent and 60 percent AMI. Other projects have relied on funding mechanisms, such as HUD Section 202 financing or Section 8 Housing Choice vouchers that restrict rents to a level equivalent to 30 percent of household income, regardless of the percent of AMI earned by the household.

### *Affordable Projects Financing*

Affordable housing developers use a variety of financing tools in order to fund their projects. The most quoted sources of funds include federal Low Income Housing Tax Credits (LIHTC), federal HOME formula grants, Arizona State Housing Fund awards, the Federal Home Loan Bank's Affordable Housing Program (AHP), HUD Section 202: Supportive Housing for the Elderly financing, and HUD Section 221 (d)(4): Mortgage Insurance for Rental and Cooperative Housing. Other sources of funds cited include Community Development Block Grants (CDBG), Community Reinvestment Act (CRA) loans, National Housing Trust funds, the Neighborhood Stabilization Program (NSP), HUD's Rural Housing and Economic Development (RHED) program, Corporation for Enterprise Development, NeighborWorks America, capital campaigns, and traditional private debt.

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<sup>2</sup> U.S. Department of Housing and Urban Development. *Section 202 Supportive Housing for the Elderly Program*. HUD.gov. 2014.

For-sale affordable projects use a variety of programs and policies to help low-income households afford their mortgage and get into a home. The most commonly listed forms of assistance quoted were down payment assistance and matching savings accounts. Other less common forms of assistance include shared equity mortgages, community land trusts, 0-percent interest mortgages, purchase price subsidies, and soft second loans.

#### Site Selection and Acquisition

Site selection for affordable developers is driven by cost and amenity requirements set by funding programs. For example, LIHTC funding is allocated on a point system that rewards projects that are close to transit, grocery stores, schools, etc. Affordable developers often rely on partnerships with non-profits or government to receive land at a lower cost. One developer described this site selection process as “opportunistic,” commenting on the fact that the availability of low-cost land is a key limiting factor to the ability of developers to deliver affordable projects. For instance, one mixed-income rental project currently under development near the soon-to-be-opened Sun Link Tucson Modern Streetcar is being developed on land acquired from the City.

Market rate developers look at amenities, zoning, financials, and minimum acreage or project size when selecting a site. Key amenities include schools, shopping, transit, and employment centers. Zoning needs to be flexible enough for the developer to build a project that will be financially feasible. Multifamily developers prefer projects of 50 units or more, while single-family developers prefer projects of 35 to 40 lots. Most developers also seek to place projects near transit—primarily along bus lines. In general, developers note that families want access to schools and parks, while seniors want access to grocery stores and healthcare.

#### Future Tucson Development Opportunities

Developers had differing opinions regarding which submarkets of the Tucson metro area present the most attractive future development opportunities. Non-profit developers are less able to choose specific submarkets but rather “go where land is cheap, available, or donated.” In general, these developers seek to go where land is affordable and services are available, and aim to be as close to the urban core as possible. For-profit developers stated a much more clear interest in specific products or submarkets. For multifamily projects, several developers cited locations Downtown and in walking distance to the streetcar as the most attractive options; others expressed a focus on the submarkets of Oro Valley and Marana, where household incomes are relatively high. Other developers expressed interest in pursuing existing home rehab opportunities. The most frequently cited for-sale development opportunities were in east Tucson, in the southeast of the metro area near Sahuarita, and in the northwest of the metro area in Marana and Oro Valley.

### *Key Opportunities*

**Demand and need for affordable housing in the Tucson metro is strong.** Developers unanimously agreed on the strength of the affordable housing demand; the most cited reasons for demand include relatively low wages and incomes, the lingering effects of the foreclosure crisis, and large amounts of aged and distressed housing in the metro area. In addition, much of the new housing product delivered since the recession is being targeted to buyers and renters at significantly higher price points than in the existing market, but household incomes have not increased to match.

**Rehabilitation of existing units presents an attractive development opportunity.** Interviewees observed that, while there are many affordable units available in Tucson, many of these units are in poor or substandard condition. Developers believe that rehab projects can play a significant role in upgrading the housing stock. The large amount of foreclosed homes filtering through the market, as well as the large amount of older and fatigued units, provide ample opportunity for developers to improve existing housing stock in a manner that supports sales and rentals to households at all income levels.

**Partnerships are an important and attractive option for delivering affordable housing projects.** All developers interviewed have worked in partnerships to produce affordable housing, or stated they would partner with experienced affordable housing developers given the right circumstances. Market rate developers can often supply capital need up front for projects, while affordable housing developers provide programmatic and capital stack financing expertise. Such partnerships present opportunities for interested developers to bring creative approaches to overcoming obstacles to affordable housing development.

## *Key Constraints*

### **Access to capital is the biggest constraint to providing successful affordable housing in Tucson.**

Developers believe that not only are sources of funding extremely competitive and requirement intensive, but that the City and County have very little to offer in gap funding resources. Additionally, the State dramatically reduced funding available through the State Housing Trust Fund, which was a source of gap financing used by most developers pursuing LIHTC. HUD also eliminated their Section 202 program, which was a major funding source for most developers doing affordable senior projects.

**Land cost is a significant barrier for affordable housing developers, especially near transit.** Currently, most land is leveraged through non-profits or government owned land. Affordable housing developers often cannot compete with market rate developers for well-located parcels due to their capital restraints. There is also a belief that financing programs favor projects near high capacity transit, often to the disadvantage of Tucson affordable housing developers.

**Zoning standards and parking requirements are perceived by developers as limiting the feasibility of projects in Tucson.** Developers stated that zoning restrictions caused them to pull out of projects in Tucson. They point to Phoenix's Downtown Code, a form-based code, as an example of zoning that allows for more flexibility in providing mixed-use and dense multifamily projects that are essential to providing affordable housing units. Interviewees also commented that parking requirements were too high compared to Phoenix, which will matter even more as development occurs near high capacity transit.

**Tucson has a significant presence of low-wage employment opportunities that present a limiting factor for rental rates.** For-profit developers stated that their market rate units were often equivalent to the 60 percent AMI income band, due to the earning profile of the metro area. Resulting low market rents make newly constructed affordable projects difficult to support, as many projects have to provide a spectrum of rents across income levels in order to support development costs.

**Some developers expressed concern that significant concentrations of affordable housing development in the Downtown area could limit market support for the higher-value amenities and retail options sought to activate the market.** Market rate developers commented that Downtown is just starting to attract market rate units other than student housing, and that a high concentration of affordable units in the area would not help to support the development of retail and other amenities that could increase the vitality of the downtown market.

# TRANSIT ORIENTED HOUSING DEMAND

To inform the High Capacity Transit (HCT) Corridors planning process, BAE was tasked with identifying the level of demand for affordable and market-rate housing in transit oriented developments. Considering current household characteristics, BAE estimated the number of households at various income levels that would be most likely to seek or benefit from transit oriented housing options. BAE then projected this total through the year 2045 based on State population projections. This subset of households is referred to in this report as TOD Housing Demand and represents the minimum portion of current and future Eastern Pima County households for whom housing options in proximity to transit will be most critical. BAE projected the portion of current and future TOD Housing Demand at multiple income levels so that the affordability needs of potential TOD households may be duly considered.

This chapter provides a detailed description of the methodology used to prepare this TOD Housing Demand projection and summarized the key findings from that analysis.

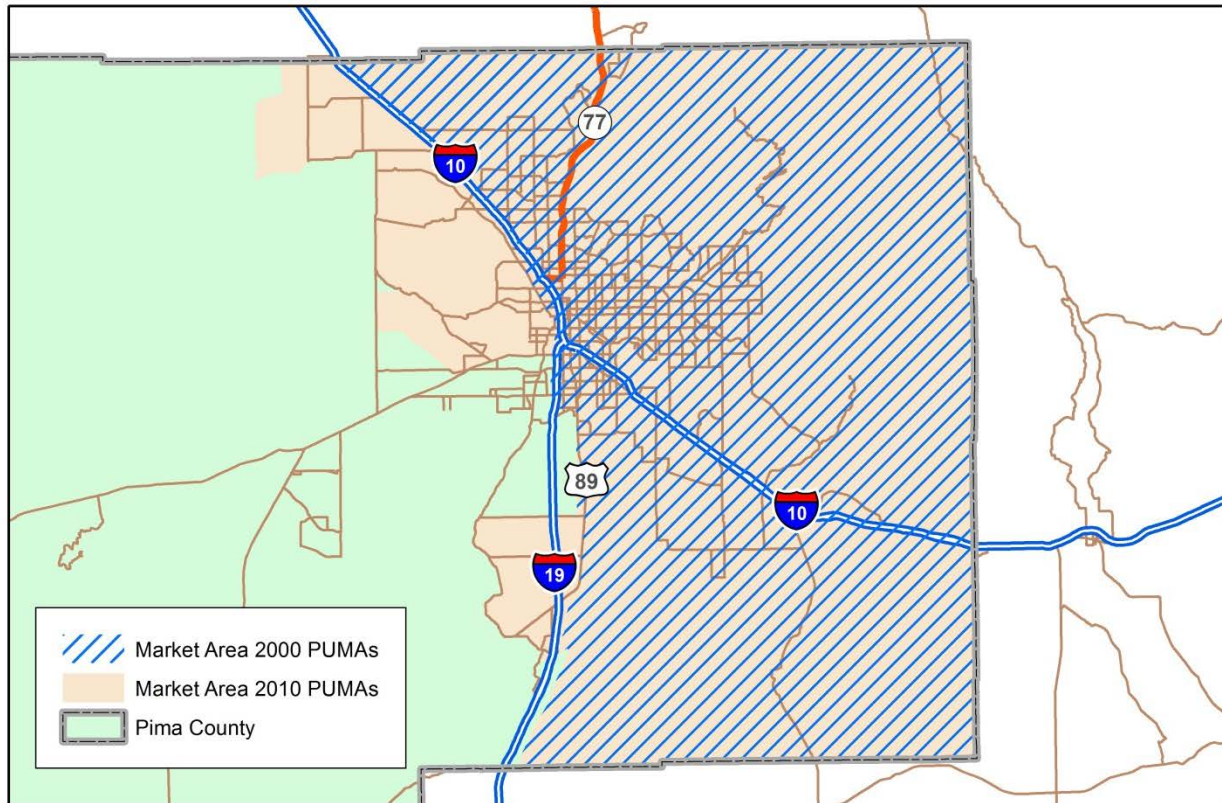
## Methodology

### *Market Area*

The baseline dataset for this TOD Housing Demand projection is the 2008-2012 Public Use Microdata Sample (PUMS) published by the US Census Bureau and based on a five percent sample of all households derived from individual responses to the American Community Survey (ACS). PUMS data are organized into Public Use Microdata Areas (PUMAs), geographic areas defined by the Census Bureau that may not correspond to other jurisdictional boundaries. By definition, PUMAs are geographic areas that have at least 100,000 persons as of the decennial Census, and do not cross county boundaries unless required to meet the minimum population requirement. The minimum population requirement serves to protect the confidentiality of individual household responses and provide a better level of statistical reliability for detailed analysis.

Due to increases or decreases in population, PUMA boundaries are adjusted following each decennial Census. For this analysis, BAE sought to use the most recent available PUMS, which corresponds to two sets of PUMAs, due to population change in the County between 2000 and 2010. The PUMAs based on ACS data from 2008 through 2011 are based on the 2000 Census, when Pima County was divided into seven PUMAs. The PUMAs used for the 2012 data are based on the 2010 Census, when Pima County was divided into nine PUMAs. To define a Market Area for the TOD Housing Demand estimate, BAE used the group of PUMAs that best approximated eastern Pima County for each year of PUMS data. These PUMAs do not correspond precisely to the actual eastern Pima County housing market, but are deemed to represent the best available dataset that allows the level of detailed analysis required for this TOD Housing Demand estimate. Figure 9 shows the additional areas of Pima County included in the 2010 PUMAs, compared to the 2000 PUMAs.

**Figure 9: Eastern Pima County Market Area, Corresponding PUMA Boundaries**



***TOD Housing Demand: Baseline Estimate***

BAE organized its estimate of TOD Housing Demand into the household typologies used in the HUD Consolidated Plan process. These typologies, referred to as Comprehensive Housing Affordability Strategy (CHAS) categories, provide a matrix of household types by tenure (i.e. renter- or owner-occupied) and by Area Median Income (AMI) level (e.g. small family renter households with an income of less than 30 percent of AMI). The CHAS categories provide a clearer picture of the types of households at different income levels likely to seek housing near transit.

CHAS categories include small elderly households, small and large related family households, and all other households at income bands ranging from less than 30 percent of AMI to more than 120 percent of AMI. One difference between the official CHAS categorization and the BAE estimate is that, due to the available data points within the PUMS data, elderly households in BAE's estimate are based on the presence of a resident age 65 and older, rather than 62 or older. Because of this and statistical sampling error, there are some differences between the counts in the BAE TOD Housing Demand estimate and the most recently published CHAS tables (from 2006-2010 ACS data). Overall, both sets of estimates are comparable in order of magnitude for each category. Any differences should not affect the overall magnitude of the estimates of households that might demand housing near transit.

Once the 2008-2012 PUMS data for the Market Area was organized into this matrix of household categories by type, tenure, and income level, BAE estimated TOD Housing Demand based on a household having one or more of the following characteristics, according to PUMS data collected between 2008 and 2012:

- Household has no car
- Household has someone who reports riding transit to work
- Household has more workers than vehicles available

Any household meeting one or more of these criteria was considered as a household that would be more likely to seek housing near transit and all other households were filtered out of the TOD Housing Demand estimate. Note that this may be considered a conservative estimate in that it does not take into account other households that might seek to live near transit for use in getting to school or for other non-work trips, nor does it take into account potential increases in demand for housing near transit due to increasing costs of car ownership or other market factors. The total number of existing households with transit demand represents the baseline TOD Housing Demand estimate for the Market Area.

#### ***TOD Housing Demand: Projection***

BAE then projected this baseline TOD Housing Demand estimate to 2015 and later years through 2045, based on population projections generated by the Arizona Department of Administration, Office of Employment and Population Statistics in 2013.

For the purposes of this projection, the share of renter and owner households in each household type and the proportion of each household type at different income levels were held constant over time. For example, it was assumed that the proportion of small family households that rent and make more than 120 percent of AMI would be the same in 2045 as in 2015. This assumption is appropriate given the lack of detailed projections of future household types and income levels.

However, the distribution of households among the four CHAS household types was adjusted as part of this projection. This is because elderly households have distinct transit needs from the other household types projected in this analysis (e.g., retired with no workers in the household). Rather than assume that the proportion of transit demand households comprised of elderly households would be the same in 2045 as in 2015, BAE adjusted the ratio of elderly to non-elderly households in each projected future year to reflect the ratio of persons over and under age 65 reported in the State population projections. This adjustment was made using a constant average household size assumption for elderly households. Such an adjustment was not possible for other household types, as these types are not defined by a discreet age range (e.g. a small family household may have a householder of any age under 65).

Projected TOD Housing Demand for 2015 represents the existing pent-up demand for TOD housing options in Eastern Pima County. The TOD demand projected for each subsequent five-year increment through 2045 represents future demand from new households with transit demand.

## TOD Housing Demand Findings

### *Projected TOD Housing Demand*

The projected pent-up demand for TOD housing is 64,500 existing households as of 2015 in Eastern Pima County. This demand estimate reflects the assumption that, if and when these households move, they will have a preference for a housing unit with transit access. Future demand for TOD housing comprises an additional 31,200 projected new households through 2045.

In total, the Eastern Pima County housing market will see demand from a total of 95,600 households seeking TOD housing between 2015 and 2045. This total demand projection includes existing transit demand households based on the assumption that all households will experience at least one move over a 30-year period.

More than two-thirds of this 30-year TOD Housing Demand is accounted for by renter households. The portion of demand composed of elderly households is projected to rise from 19 percent in 2015 to nearly one-quarter of all households with transit demand in 2045. Nearly 40 percent of the total 30-year demand comprises small related households, while less than 10 percent of the total demand is made up of large related households. All other households (i.e. non-family and non-elderly) account for 30 percent of the total 30-year TOD Housing Demand.

**Table 7: TOD Housing Demand by Tenure and Type, Eastern Pima Co., 2015 - 2045**

	Renter					Owner					Grand Total
	Elderly	Small Related	Large Related	All Other	Total	Elderly	Small Related	Large Related	All Other	Total	
2015 (a)	7,827	14,880	3,144	18,035	43,886	4,661	10,927	2,331	2,631	20,549	64,435
2020 (b)	1,644	780	165	946	3,535	979	573	122	138	1,812	5,347
2025	1,748	790	167	958	3,662	1,041	580	124	140	1,884	5,547
2030	1,400	830	175	1,005	3,410	833	609	130	147	1,719	5,129
2035	749	1,095	231	1,327	3,402	446	804	171	194	1,615	5,017
2040	580	1,175	248	1,425	3,428	345	863	184	208	1,600	5,028
2045	427	1,263	267	1,531	3,488	254	927	198	223	1,603	5,090
<b>Total</b>	<b>14,375</b>	<b>20,812</b>	<b>4,398</b>	<b>25,225</b>	<b>64,811</b>	<b>8,560</b>	<b>15,283</b>	<b>3,260</b>	<b>3,680</b>	<b>30,783</b>	<b>95,594</b>

**Notes:**

(a) Figures for 2015 represent the existing pent-up demand based on 2008 - 2012 PUMS and adjusted according to State population forecast

(b) Figures for 2020 and all subsequent years represent the additions TOD housing demand from new households for each five-year increment based on State population forecast

Sources: 2008-2012 American Community Survey (ACS) Public Use Microdata Sample (PUMS); Arizona Department of Administration, Office of Employment and Population Statistics, 2013; BAE, 2014.



## Affordability Profile of TOD Housing Demand

There are multiple approaches to characterizing the housing affordability profile of a given market. This analysis will discuss current and projected housing affordability in Eastern Pima County in terms of housing cost burden and market rate affordability.

### *Housing Cost Burden*

HUD classifies households that pay more than 30 percent of monthly income on housing costs (e.g. rent or mortgage payments) as cost-burdened households. This is a standard indicator of housing affordability, and reflects the extent to which housing costs limit a household's ability to spend on other needs (e.g. transportation and health care) and on discretionary goods and services. Housing cost burden, as a simple ratio of housing cost to income, accounts for market conditions and income levels without requiring comprehensive housing market information.

Among the 64,500 existing transit demand households in 2015, nearly half are currently housing cost-burdened. Among existing renter households, nearly 60 percent are cost-burdened, compared with about one-third of owner households that are cost-burdened. These 31,800 cost-burdened transit demand households represent a pool of existing households in the Eastern Pima County market that would be likely to seek different housing, near transit, if there were more affordable options available. While this measure does not indicate the rental rate or home sale price range that would be affordable to cost-burdened households, it does indicate that there is a significant affordable housing need among existing transit demand households in the Market Area.

Cost burden was not projected for future years, as future TOD Housing Demand represents households that do not currently exist, but are expected to form and seek transit accessible housing in the future.

### **Market Rate Affordability**

This approach estimates the rental rate or home price that can be supported by various income levels and compares that to the income levels estimated for the households in the Market Area. This approach identifies both the portion of households with insufficient incomes to afford market rate housing and provides a rough maximum rental rate and sale price point for affordable housing in a given market.

BAE projected the number of households in each income band through 2045, assuming a constant income distribution. Income bands are defined by the percentage of Area Median Income (AMI) earned by the household, presented in the CHAS categories used for this analysis. HUD defines households within these income level bands as follows: households earning less than 30 percent of AMI are extremely low income; households earning between 30 and 50 percent AMI are very low income; households earning between 50 and 80 percent AMI are low income; and households earning between 80 and 120 percent AMI are considered moderate income. All households earning less than 80 percent AMI are considered below-moderate income. This categorization allows for a consistent approach to housing affordability analysis across the country and reflects the same household income categories used in federal affordable housing tax credit and other funding programs.

Of the 95,600 households with transit demand that are projected to seek housing in the Eastern Pima County market over 30 years, more than two-thirds are projected to be below-moderate income households earning less than 80 percent AMI. Over 30 percent of TOD demand households will be extremely low income households (earning less than 30 percent AMI) and another 20 percent will be very low income households (earning between 30 and 50 percent AMI).

**Table 8: TOD Housing Demand by AMI level, Eastern Pima Co., 2015 – 2045**

	Income Level (All Households)						Total TOD Demand
	Extremely Low, Very Low, and Low Income			Moderate Income			
	below 30% AMI	30 to 50% AMI	50 to 80% AMI	80 to 100% AMI	100 to 120% AMI	above 120% AMI	
2015 (a)	19,534	11,746	12,004	5,285	4,092	11,775	64,435
2020 (b)	1,671	1,148	978	422	308	821	5,347
2025	1,736	1,198	1,014	437	318	845	5,547
2030	1,594	1,070	941	408	301	815	5,129
2035	1,528	939	932	409	314	895	5,017
2040	1,523	911	937	413	320	924	5,028
2045	1,534	895	952	421	329	960	5,090
<b>Total</b>	<b>29,119</b>	<b>17,906</b>	<b>17,757</b>	<b>7,794</b>	<b>5,983</b>	<b>17,034</b>	<b>95,594</b>
<i>% total</i>	30.5%	18.7%	18.6%	8.2%	6.3%	17.8%	

**Notes:**

(a) Figures for 2015 represent the existing pent-up demand based on 2008 - 2012 PUMS and adjusted according to State population forecast  
 (b) Figures for 2020 and all subsequent years represent the additions! TOD housing demand from new households for each five-year increment based on State population forecast

Sources: 2008-2012 American Community Survey (ACS) Public Use Microdata Sample (PUMS); Arizona Department of Administration, Office of Employment and Population Statistics, 2013; BAE, 2014.

## Affordability in the Rental Market

Of the 64,800 renter households included in the 30-year TOD Housing Demand projection, more than three-quarters will be below-moderate income households earning less than 80 percent AMI. Nearly 40 percent of the TOD demand households will comprise extremely low income households (earning less than 30 percent AMI) and another 20 percent will be very low income households (earning between 30 and 50 percent AMI).

**Table 9: TOD Housing Demand by AMI Level, 2015 – 2045 – Renter Households**

	Income Level (Renter Households)						Total TOD Demand
	Extremely Low, Very Low, and Low Income			Moderate Income			
	below 30% AMI	30 to 50% AMI	50 to 80% AMI	80 to 100% AMI	100 to 120% AMI	above 120% AMI	
2015 (a)	17,044	8,801	8,439	3,006	2,373	4,224	43,886
2020 (b)	1,375	785	644	237	196	298	3,535
2025	1,425	816	666	246	203	307	3,662
2030	1,326	743	628	230	188	295	3,410
2035	1,322	693	649	232	185	322	3,402
2040	1,331	685	660	235	185	331	3,428
2045	1,354	685	677	240	188	344	3,488
<b>Total</b>	<b>25,177</b>	<b>13,207</b>	<b>12,363</b>	<b>4,425</b>	<b>3,517</b>	<b>6,121</b>	<b>64,811</b>
<i>% total</i>	<i>38.8%</i>	<i>20.4%</i>	<i>19.1%</i>	<i>6.8%</i>	<i>5.4%</i>	<i>9.4%</i>	

Notes:

(a) Figures for 2015 represent the existing pent-up demand based on 2008 - 2012 PUMS and adjusted according to State population

(b) Figures for 2020 and all subsequent years represent the additional TOD housing demand from new households for each five-year increment based on State population forecast

Sources: 2008-2012 American Community Survey (ACS) Public Use Microdata Sample (PUMS); Arizona Department of Administration, Office of Employment and Population Statistics, 2013; BAE, 2014.

To estimate affordable apartment rental rates for transit demand households at each of these income bands, BAE reviewed the maximum allowable rates published by the Arizona Department of Housing (ADOH) for the Low Income Housing Tax Credit Program (LIHTC) for 2014. These rates are produced by ADOH based on HUD rent limits to determine the maximum rent for below-moderate income households that can be charged without forcing households to pay more than 30 percent of monthly income on housing costs. In other words, these are the maximum rental rates these households can afford without becoming cost-burdened.

Table 10 shows these rates for different unit types<sup>3</sup>, as well as the market rental rates for those units according to data provided by RealFacts based on a sample of 43,000 apartment units in Pima County surveyed at the end of 2013. The table also shows the share of sampled units of each unit type (e.g. studio or one-bedroom units).

<sup>3</sup> Because ADOH does not publish rent limits for households making above 60% AMI, rent limit figures for 80% AMI households as shown represent estimates produced by BAE based on comparison of published HUD and ADOH rates.

**Table 10: Affordable and Market Rents, Pima County, 2014**

<b>Monthly Rent by Income Level (a)</b>					
	<b>Studio</b>	<b>1 Bdrm</b>	<b>2 Bdrm</b>	<b>3 Bdrm</b>	<b>4 Bdrm</b>
50 to 80% AMI	\$498 - \$796	\$534 - \$853	\$641 - \$1,024	\$741 - \$1,184	\$827 - \$1,320
30 to 50% AMI	\$299 - \$498	\$320 - \$534	\$384 - \$641	\$444 - \$741	\$496 - \$827
below 30% AMI	< \$299	< \$320	< \$384	< \$444	< \$496

<b>Market Data (b)</b>					
	<b>Studio</b>	<b>1 Bdrm</b>	<b>2 Bdrm</b>	<b>3 Bdrm</b>	<b>4 Bdrm</b>
Market rental rates	\$437	\$555	\$739	\$918	\$1,310
Share Mkt. Area units	4.9%	50.8%	37.4%	6.0%	0.9%

**Notes:**

(a) Represents the maximum rent deemed affordable to households in each income band, as defined by ADOH based on HUD rent limits. Because ADOH reported rent limits only up to the 60% AMI level, the 80% AMI rent limit presented is an estimate produced by BAE based on a comparison of published HUD and ADOH income levels and rent limits.

(b) Represents 4th quarter 2013 data from a sample of 43,000 rental units in Pima County, provided by RealFacts

Shaded cells indicate unit types for which the market rental rate is affordable to households at each income level.

Sources: ADOH, 2013; RealFacts, 2014; BAE, 2014.

As shown, the average market rates for one-bedroom and two-bedroom units – the unit type that makes up 88 percent of all apartments – are not affordable to extremely low and very low income households earning less than 50 percent AMI. The average market rates for one-, two-, and three-bedroom units are affordable to some low income households (earning between 50 and 80 percent AMI), but not all. The average rental rate for four-bedroom units is just within reach for households at the upper end of the low income band that earn up to 80 percent of AMI.

The only unit type for which the average market rental rate is affordable to low income households (earning between 30 and 50 percent AMI) are studio units. These units are only affordable to households at the upper end of this income band, earning up to 50 percent of AMI, and studio units accounted for just five percent of the County’s rental housing stock.

It should be noted that the market rental rate data shown in Table 10 represent available summary data at the time of analysis. Because these figures reflect average asking rental rates, a precise estimate of the number of existing units that are unaffordable to households at various income levels is not possible; some units will rent for below the average at levels affordable to low, very low, and extremely low income TOD demand households, while some will rent above that level. Also, as presented in the Housing Market Existing Conditions chapter of this report, newly constructed rental units rent at a premium of up to 60 percent above current market rates; new development at TOD sites will therefore be even less affordable to these TOD demand households than available apartments in existing buildings throughout the Market Area.

These data indicate that a significant portion of existing and future TOD demand households will face limited affordability in the rental housing market; the average rental rate for nearly 90 percent of rental units is unaffordable to the existing 25,800 extremely low or very low income households with transit demand. This means that nearly 60 percent of existing TOD demand households are unable

to afford apartments at or above the average rate. In addition, up to 8,500 existing TOD demand households making between 50 and 80 percent AMI will be unable to rent two-, three-, and four-bedroom apartments at or above the market rate.

Assuming that the share of households in each income band and the ratio of market rental rates to those income levels remain constant over time, this means that over 30 years Eastern Pima County will see demand for below market rate rental units at TOD sites from a total of 38,400 extremely low and very low income households and up to 12,400 low income households.

## Affordability in the Ownership Market

Over 30 years, a projected 30,800 transit demand households will be owner households. Of these, 8,600, or nearly 30 percent, will be extremely low or very low income households (making below 50 percent of AMI), and an additional 5,400, or 18 percent, will be low income households making between 50 and 80 percent AMI. More than half of the existing and future TOD demand owner households will be above-moderate income households earning more than 80 percent AMI.

**Table 11: TOD Housing Demand by AMI Level, 2015 – 2045 – Owner Households**

	Income Level (Owner Households)						Total TOD Demand
	Extremely Low, Very Low, and Low Income			Moderate Income			
	below 30% AMI	30 to 50% AMI	50 to 80% AMI	80 to 100% AMI	100 to 120% AMI	above 120% AMI	
2015 (a)	2,491	2,945	3,565	2,279	1,719	7,550	20,549
2020 (b)	296	363	334	185	112	523	1,812
2025	311	382	348	191	115	538	1,884
2030	268	327	313	178	113	520	1,719
2035	206	246	283	177	130	573	1,615
2040	192	226	277	178	135	592	1,600
2045	180	210	274	181	142	616	1,603
<b>Total</b>	<b>3,943</b>	<b>4,699</b>	<b>5,394</b>	<b>3,369</b>	<b>2,465</b>	<b>10,913</b>	<b>30,783</b>
<i>% total</i>	<i>12.8%</i>	<i>15.3%</i>	<i>17.5%</i>	<i>10.9%</i>	<i>8.0%</i>	<i>35.5%</i>	

**Notes:**

(a) Figures for 2015 represent the existing pent-up demand based on 2008 - 2012 PUMS and adjusted according to State population forecast

(b) Figures for 2020 and all subsequent years represent the additional TOD housing demand from new households for each five-year increment based on State population forecast

Sources: 2008-2012 American Community Survey (ACS) Public Use Microdata Sample (PUMS); Arizona Department of Administration, Office of Employment and Population Statistics, 2013; BAE, 2014.

To quantify the demand for affordable housing among TOD demand owner households, BAE first estimated the home sale price that would be affordable to households in each income band. The affordable sale price was defined as the home price that can be supported by a total monthly housing cost of no more than 30 percent of household income. Housing costs considered included mortgage principal and interest payments based on standard mortgage terms and prevailing interest rates, homeowner's insurance premium payments, and property tax payment based on data published by the Pima County Board of Supervisors.

BAE then compared these affordable sales price levels to the sales price distribution of more than 13,000 single family detached, townhouse, and condominium home sales that closed in 2013 in Eastern Pima County based on Multiple Listing Service (MLS) data reported by the Tucson Realtors Association<sup>4</sup>.

<sup>4</sup> MLS data do not include unrepresented sales and most new home construction sales. County Assessor data obtained through DataQuick indicate that in 2013, just over 300 new homes constructed since 2010 sold in Eastern Pima County, so the MLS data shown in Table 12 do reflect the vast majority of recent sales in the area.

**Table 12: Affordable and Market Home Sale Prices, Eastern Pima County, 2014**

<b>Household Incomes by Percent of AMI (a)</b>				
	<b>1 Person HH</b>	<b>2 Person HH</b>	<b>3 Person HH</b>	<b>4 Person HH</b>
50 to 80% AMI	\$19,950 - \$31,870	\$22,800 - \$36,447	\$25,650 - \$41,023	\$28,500 - \$45,600
30 to 50% AMI	\$11,970 - \$19,950	\$13,680 - \$22,800	\$15,390 - \$25,650	\$17,100 - \$28,500
below 30% AMI	< \$11,970	< \$13,680	< \$15,390	< \$17,100

<b>Affordable Home Sale Price (b)</b>				
	<b>1 Person HH</b>	<b>2 Person HH</b>	<b>3 Person HH</b>	<b>4 Person HH</b>
50 to 80% AMI	\$83,520 - \$133,423	\$95,451 - \$152,583	\$107,383 - \$171,742	\$119,314 - \$190,902
30 to 50% AMI	\$50,112 - \$83,520	\$57,271 - \$95,451	\$64,430 - \$107,383	\$71,588 - \$119,314
below 30% AMI	< \$50,112	< \$57,271	< \$64,430	< \$71,588

<b>Share of Recent Sales by Household Price Range (c)</b>				
	<b>1 Person HH</b>	<b>2 Person HH</b>	<b>3 Person HH</b>	<b>4 Person HH</b>
50 to 80% AMI	25%	32%	37%	36%
30 to 50% AMI	8%	9%	10%	18%
below 30% AMI	5%	7%	10%	10%
<b>subtotal</b>	<b>38%</b>	<b>48%</b>	<b>57%</b>	<b>64%</b>

**Notes:**

(a) Represents annual income levels published by ADOH, based on HUD income limits. Because ADOH reported income limits only up to the 60% AMI level, the 80% AMI income limit was estimated by BAE based on a comparison of published HUD and ADOH income levels.

(b) Represents home price amount affordable to households at each income level assuming standard mortgage terms and prevailing interest rates, average homeowner's insurance premium as reported by Arizona Department of Insurance, and average property tax payment for urban Pima County based on data provided by the Pima County Board of Supervisors.

(c) Represents sales price distribution for 13,000 single family residential, townhouse, and condominium sales in Eastern Pima County based on Multiple Listing Service (MLS) data for 2013 reported by the Tucson Realtors Association.

Sources: ADOH, 2013; HUD, 2014; Arizona Department of Insurance, 2013; Pima County Board of Supervisors, 2014; Tucson Realtors Association MLS, 2014; BAE, 2014.

Table 12 shows that between 40 percent and two-thirds of recent home sales closed at a price that would be affordable to below-moderate income TOD demand households making less than 80 percent of AMI. For three-person households, the household type that most closely corresponds with the average owner household size of 2.6 persons, nearly 60 percent of homes are affordable.

Most of these for-sale units are affordable only to low income households making between 50 and 80 percent AMI. For very low and extremely low income households (those making below 50 percent of AMI), only 20 percent of homes are affordable at current market rate prices. As described in the Housing Market Existing Conditions chapter of this report, new housing units in the Market Area sell at a premium of roughly 20 percent above re-sales. This means that new homes, townhouses, and condominiums built at TOD sites will be somewhat less affordable on average to low income households when they are first sold.

The 14,000 below-moderate income households projected to seek TOD housing options over 30 years will primarily rely on newly constructed housing units to suit their needs, as TOD housing along the proposed HCT corridors has largely yet to develop. To understand the market affordability gap for these TOD demand households, BAE reviewed annual sales data for the past 10 years. According to sales data provided by DataQuick based on County Assessor records, an average of 1,700 recently constructed homes (those built in the three years prior to the year of sale) were sold each

year from 2004 through 2013 in Eastern Pima County. If this 10-year average were to hold over the next 30 years, a total of 52,100 new homes would be sold over that time period.

Applying the home price affordability estimates presented in Table 12 to these sales projections, roughly 10,400 new homes can be expected to be sold at a price affordable to extremely low and very low income households making below 50 percent of AMI, for the average three-person household. For the average three-person low income household making between 50 and 80 percent AMI, an estimated 19,300 new homes will sell at an affordable price over 30 years.

**Table 13: Projected New Housing Unit Sales by Affordability**

<b>New Unit Sales</b>			
10-year annual average (a):		1,735	
30-year projected new unit sales:		52,062	
<b>New Unit Affordability</b>			
	<b>Extremely/Very Low- Income HHs (&lt; 50% AMI)</b>	<b>Low to Moderate Income HHs (50 - 80% AMI)</b>	<b>Total Below Moderate Income HHs (&lt; 80% AMI)</b>
Percent of Sales Affordable (b)	20.0%	37.0%	57.0%
Projected Affordable Sales, 30-yrs	10,412	19,263	29,675
<b>New Unit Affordability</b>			
	<b>Extremely/Very Low- Income HHs (&lt; 50% AMI)</b>	<b>Low to Moderate Income HHs (50 - 80% AMI)</b>	<b>Total Below Moderate Income HHs (&lt; 80% AMI)</b>
30-yr TOD Demand (Households) (c)	8,642	5,394	14,036
TOD Demand as % of Aff. Sales	83.0%	28.0%	47.3%

**Notes:**

(a) Represents the 10-year annual average number of new unit sales from 2003 to 2013 that were built in the three years prior to the year of sale or in the year of sale, according to Assessors data provided by DataQuick.

(b) Represents the percent of recent home sales in Eastern Pima County that closed at a price affordable to a 3-person household, according to MLS sales data and ADOH income limits as presented in Table 12 of this report.

(c) Projected TOD demand based on PUMS dataset, as presented in Table 11 of this report.

Sources: DataQuick, 2014; BAE, 2014.

The figures shown in Table 13 indicate that the Eastern Pima County housing market can be expected to sell a sufficient number of new homes over 30 years at prices that will be affordable to the 14,000 below-moderate income TOD demand buyer households.

However, in order to provide a sufficient amount of affordable for-sale housing options at TOD sites to meet projected demand, more than 80 percent of all new housing units affordable to extremely low and very low income households would have to be located at a TOD site, and nearly 30 percent of all homes affordable to low to moderate income households would need to be developed at a TOD site. In other words, Eastern Pima County can be expected to provide enough affordable for-sale housing in the aggregate, but a significant amount of the region's for-sale development would need to occur at TOD sites in order to provide for the needs of TOD demand households.



# OPPORTUNITY SITES FOR TRANSIT ORIENTED DEVELOPMENT

BAE evaluated the development potential of 24 proposed High Capacity Transit (HCT) station areas presented in the Pima Association of Governments (PAG) High Capacity Transit System Plan throughout the Eastern County. Station areas were scored and prioritized as near-, mid-, or long-term development priorities, referring to sites that should be prioritized for TOD housing development in the coming 10, 20, or 30 years, respectively. This evaluation is intended to inform the HCT planning process regarding the relative suitability of the 24 proposed station areas for transit oriented development (TOD) affordable and mixed-income housing.

## Methodology

This evaluation was based on population and household data from the American Community Survey (ACS) and employment data from the Pima Association of Governments (PAG) 2012 Travel Reduction Program available at the time of analysis. This evaluation does not consider suitability criteria for specific development sites such as physical constraints, permitted uses, allowable densities, or improved value to land value ratios. The criteria used to evaluate each station and the metric used to evaluate the area are as follows:

- Housing cost burden – Percent of households with housing cost burden
- Rental availability – Rental vacancy rate
- Employment access – Number of jobs accessible via proposed HCT corridors
- Transit options – Number of HCT lines serving station area
- Transit usage – Percent of residents currently using transit

### *Housing Cost Burden*

Housing cost burden is calculated as the proportion of a household's income that goes toward housing costs. If housing costs take up 30 percent or more of a household's income, the household is considered to have a high housing cost burden, with inadequate income left for other living expenses. Housing cost burden is measured for the Census tracts encompassing the area within a half-mile of each candidate station site, based on five-year American Community Survey (ACS) data for the 2008 to 2012 period. Since neighborhoods and cities with high housing cost burdens have a demonstrable need for additional affordable housing, station areas with a higher proportion of households with housing cost burden are given a higher priority for affordable housing development.

### *Rental Availability*

Low vacancy rates are indicative of a tight rental market, with limited availability and rising rents as demand outstrips supply. Since lower income households tend to be renters, the analysis here focuses on rental vacancy rates as measured based on the 2010 Census for Census Tracts encompassing the area within a half mile of each candidate station. Station areas with low rental vacancy rates are given a higher priority for affordable housing development.

### ***Employment Access***

Proposed stations with higher numbers of jobs accessible via the existing and proposed HCT corridors are given a higher priority for affordable housing development, since access to jobs is key to allowing lower-income households to reduce their auto-related transportation costs. Greater access should lead to more employment options and greater job retention opportunities for low-income workers. Employment is measured based on businesses and government entities reporting more than 50 employees as surveyed for the Pima Association of Governments' Travel Reduction Program (TRP) in 2012. For a given station, the accessible jobs consist of TRP employment within one mile of the proposed HCT lines directly accessible from the candidate station.

### ***Transit Options***

The greater the number of proposed HCT lines serving a proposed station, the greater the accessibility to jobs, shopping, educational institutions, medical facilities, entertainment, and other regional amenities. Higher priority for affordable housing development is given to stations with more directly accessible HCT lines. In cases where short-term lines (e.g., BRT indicated as near- and/or mid-term) are ultimately replaced by longer-term solutions (light rail indicated as mid- and/or long-term), the route is only counted once in calculating the number of lines that serve to proposed station.

### ***Transit Usage***

A higher proportion of residents currently using transit to get to work is an indicator that transit options provide a relatively good connection between the area and job centers and other regional amenities. Such areas are assumed to have a character suitable for additional transit oriented development, including affordable housing, especially when proposed HCT options become available. Higher priority is given to stations with higher per capita transit usage. The metric used is the percent of workers commuting by bus (the primary transit option available in the area) for a one-mile radius around each candidate station, based on ESRI data derived from the 2005-2009 American Community Survey.

### ***Ranking Procedure***

To apply the above metrics as measures of the potential for affordable or mixed-income TOD housing in each proposed station area, BAE developed a simple system where for each variable, the 24 proposed station areas of this study were ranked from one to three, with one being the ranking for higher potential. As a first pass, the top eight in each category were given a "1" score, the middle eight given a "2" score, and the lowest eight given a "3" score. For some variables where there are tie scores, ranks with one or more stations have been changed based on natural breaks in the distribution (e.g., all station areas with zero percent bus ridership are given a score of "3" for that metric). As a final step, the scores for each station area for the five metrics are summed to provide an overall ranking and then categorized as having "Near-term," "Mid-term," or "Long-term" potential for affordable or mixed-income TOD housing development. Details on the ranking can be found in Appendix D.

## Prioritization of Opportunity Sites

Table 14 indicates the rank and priority level assigned to each proposed station, based on the evaluation methodology described above. Of the 24 proposed stations included in this study, seven were ranked as near-term priority stations for TOD affordable and mixed-income housing development<sup>5</sup>. Eight stations were ranked as mid-term priorities for development, while nine stations received long-term priority designation.

**Table 14: TOD Housing Development Priority for Proposed HCT Station Areas**

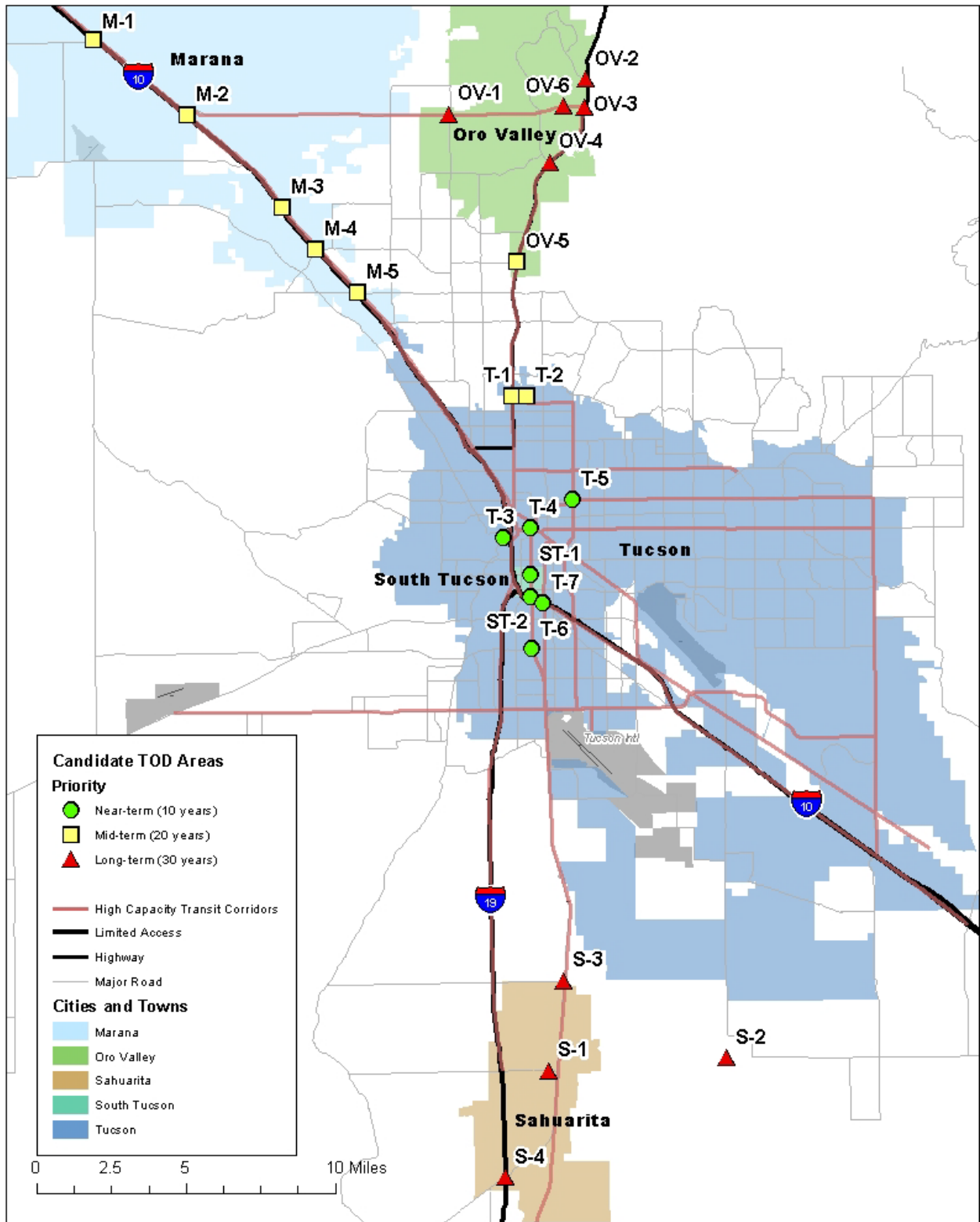
<u>Station</u>	<u>Location</u>	<u>City</u>	<u>Rank</u>	<u>Priority</u>
T-5	Speedway & Campbell	Tucson	6	Near-term
T-4	Ronstadt Transit Center	Tucson	6	Near-term
ST-1	29th & 6th Ave	South Tucson	7	Near-term
ST-2	39th & 6th Ave	South Tucson	7	Near-term
T-3	Mercado Streetcar Stop	Tucson	7	Near-term
T-7	RR & I-10	Tucson	8	Near-term
T-6	Laos Transit Center	Tucson	8	Near-term
M-5	Ina & I-10	Marana	9	Mid-term
M-4	Cortaro & I-10	Marana	9	Mid-term
M-2	Tangerine & I-10	Marana	9	Mid-term
M-3	Twin Peaks & I-10	Marana	10	Mid-term
M-1	Marana Rd & I-10	Marana	10	Mid-term
T-2	Wetmore & Stone	Tucson	10	Mid-term
OV-5	Magee & Oracle	Oro Valley	11	Mid-term
T-1	Wetmore & Oracle	Tucson	11	Mid-term
S-3	Pima Mine & Nogales Hwy	Sahuarita	12	Long-term
S-2	Sahuarita Rd & Wilmot	Sahuarita	12	Long-term
OV-1	La Cholla & Tangerine	Oro Valley	12	Long-term
OV-3	Tangerine & Oracle	Oro Valley	13	Long-term
OV-4	1st & Oracle	Oro Valley	13	Long-term
S-1	Sahuarita Rd & Nogales Hwy	Sahuarita	14	Long-term
OV-6	Innovation & Tangerine	Oro Valley	14	Long-term
S-4	Duval Mine & I-10	Sahuarita	15	Long-term
OV-2	Rancho Vistoso & Oracle	Oro Valley	15	Long-term

Sources: ESRI; American Community Survey; 2010 Decennial Census; PAG Travel Reduction Program; Drachman Institute; BAE.

All seven near-term priority stations are located in Tucson or South Tucson, while two additional Tucson stations – at Wetmore & Stone and Wetmore & Oracle were ranked as mid-term priorities. All five Marana stations were ranked as mid-term priority areas, while all four Sahuarita stations were ranked as long-term priorities. One Oro Valley station area was ranked as a mid-term development priority, at Magee & Oracle, while the remaining Oro Valley stations were ranked as long-term priorities.

<sup>5</sup> The proposed HCT Station at Speedway & Campbell (Station T-5) is located in an area with a significant number of student residents due to its proximity to the University of Arizona campus. A significant presence of student residents in a given area generally increases the portion of households that appear to be cost-burdened. This analysis did not control for the presence of student residents in any station area, so the housing cost burden profile for this Station T-5 may be somewhat inflated.

**Figure 10: TOD Housing Development Priority for Proposed HCT Station Areas**



Source: BAE, 2014.

As illustrated in Figure 10, prioritizing proposed HCT stations in consideration of employment and transit access and housing market constraints suggests a high priority for near-term TOD affordable and mixed-income housing development at the region's center. This prioritization is not intended to suggest that proposed HCT stations in outlying areas are less viable TOD development sites. Rather, the priority rankings presented here serve to indicate where the region might most effectively target constrained resources in support of affordable and mixed-income housing development at TOD sites at different stages of development. TOD housing development at these near-term priority stations would be the most effective in addressing the demand for affordable TOD housing options demonstrated in this report in the near term.

# RECOMMENDATIONS

**Focus housing resources to support affordable rental housing.** More than two-thirds of the 30-year TOD housing demand projected in this report will come from renter households. Between 60 and 80 percent of these households will not be able to afford apartments at or above the market rental rate. This constitutes a 30-year demand for affordable TOD rental housing of between 38,400 and 50,800 households. By comparison, demand for affordable TOD for-sale housing is projected at 14,000 owner households over 30 years.

**Assess the availability of publicly-owned land to support affordable housing development.**

Developers cited the high cost of land acquisition for viable and attractive sites as a key impediment to affordable housing development in Pima County. By definition, affordable housing cannot support the same land cost as market rate housing or other uses that achieve higher rents or sale prices. Publicly-owned land can be a key tool, either through sales or public-private partnership, in supporting new affordable housing development.

**Review zoning, parking, and other regulations for opportunities to support affordable housing development.**

Density and flexibility with zoning standards – particularly parking requirements – are key considerations for developers when pursuing a project. For affordable housing development, these considerations become all the more important. Finding opportunities to revise the zoning code and other regulations, such as allowing for a density-bonus to affordable housing project or parking requirement reduction for projects near transit, can be an important, no-cost tool for jurisdictions seeking to support affordable housing development.

**Prioritize “near-term” TOD development sites for dense, multifamily affordable housing.** The proposed station areas ranked as near-term priorities are the best suited to meet the affordable TOD housing demand demonstrated in this report. Special consideration should be given as development is proposed for these sites to ensure that these high priority sites are used to effectively support the region’s affordable TOD housing goals.

**Conduct a study of specific development sites at proposed HCT station areas to develop an affordable TOD housing development strategy.**

Evaluation of specific potential development sites to determine housing unit capacity and financial feasibility would further inform the HCT planning process by identifying the portion of the affordable TOD housing need that could be accommodated at various sites under different density and development scenarios.

# APPENDIX A: HOUSING MARKET EXISTING CONDITIONS DATA TABLES

**Table A-1: Population and Household Trends, 2000-2014 (a)**

<b>Area</b>	<b>2000</b>	<b>2010</b>	<b>2014 (a)</b>	<b>Total Growth 2000-2014</b>	<b>Avg. Annual Growth 2000-2014</b>	<b>2010-2014</b>
<b>Pima County</b>						
Population	843,746	980,263	999,461	18.5%	1.2%	0.5%
Households	332,350	388,660	396,111	19.2%	1.3%	0.5%
Avg. household size	2.47	2.46	2.46			
<b>Tucson</b>						
Population	486,699	520,116	524,264	7.7%	0.5%	0.2%
Households	192,891	205,390	208,167	7.9%	0.5%	0.3%
Avg. household size	2.42	2.43	2.41			
<b>Oro Valley</b>						
Population	29,700	41,011	42,391	42.7%	2.6%	0.8%
Households	12,249	17,804	18,201	48.6%	2.9%	0.6%
Avg. household size	2.41	2.30	2.32			
<b>Marana</b>						
Population	13,556	34,961	38,925	187.1%	7.8%	2.7%
Households	4,944	13,073	14,232	187.9%	7.8%	2.1%
Avg. household size	2.66	2.63	2.71			
<b>Sahuarita</b>						
Population	3,242	25,259	28,619	782.8%	16.8%	3.2%
Households	1,155	9,020	9,883	755.7%	16.6%	2.3%
Avg. household size	2.78	2.79	2.89			
<b>South Tucson</b>						
Population	5,490	5,652	5,499	0.2%	0.0%	-0.7%
Households	1,810	1,827	1,772	-2.1%	-0.2%	-0.8%
Avg. household size	2.94	2.93	2.91			

**Notes:**

(a) Figures for 2014 reflect estimate provided by Nielsen; figures may not correspond precisely with population projection figures generated by other sources.

Sources: US Census, 2000, 2010; Nielsen, 2014; BAE, 2014.

**Table A-2: Population Projections, 2014-2040**

Area	2015	2020	2025	2030	2035	2040	2045	Total Growth	Avg. Annual Growth
								2015-2045	2015-2045
Pima County	1,022,079	1,022,079	1,100,021	1,172,515	1,243,099	1,312,101	1,447,403	41.6%	1.2%
Tucson	537,129	537,129	572,636	610,374	647,118	683,038	753,472	40.3%	1.1%
Oro Valley	42,259	42,259	44,811	47,405	49,784	52,072	56,453	33.6%	1.0%
Marana	41,019	41,019	48,324	55,287	61,988	68,859	82,714	101.6%	2.4%
Sahuarita	28,483	28,483	34,529	41,276	45,403	48,527	54,729	92.1%	2.2%
South Tucson	5,670	5,670	5,637	5,585	5,550	5,544	5,727	1.0%	0.0%

Sources: ADOA, 2012; PAG, 2012; BAE, 2014.



**Table A-3: Household Income, Pima County, 2014**

	Number of Households by Annual Household Income											
	Pima County		Tucson		Oro Valley		Marana		Sahuarita		S. Tucson	
	#	%	#	%	#	%	#	%	#	%	#	%
Less than \$15,000	64,887	16.4%	44,790	21.5%	1,364	7.5%	890	6.3%	562	5.7%	606	34.2%
\$15,000-\$24,999	51,657	13.0%	32,042	15.4%	1,424	7.8%	1,038	7.3%	640	6.5%	352	19.9%
\$25,000-\$34,999	47,148	11.9%	27,715	13.3%	1,455	8.0%	978	6.9%	587	5.9%	311	17.6%
\$35,000-\$49,999	57,770	14.6%	31,750	15.3%	2,537	13.9%	1,622	11.4%	1,190	12.0%	265	15.0%
\$50,000-\$74,999	70,778	17.9%	33,991	16.3%	3,169	17.4%	3,681	25.9%	2,568	26.0%	146	8.2%
\$75,000-\$99,999	42,374	10.7%	17,951	8.6%	2,694	14.8%	2,336	16.4%	1,842	18.6%	54	3.0%
\$100,000-\$149,999	39,256	9.9%	14,104	6.8%	3,063	16.8%	2,569	18.1%	1,903	19.3%	33	1.9%
\$150,000-\$199,999	11,641	2.9%	3,468	1.7%	1,195	6.6%	584	4.1%	441	4.5%	2	0.1%
\$200,000-\$249,999	3,920	1.0%	1,028	0.5%	470	2.6%	198	1.4%	93	0.9%	0	0.0%
\$250,000 or more	6,680	1.7%	1,328	0.6%	830	4.6%	336	2.4%	57	0.6%	3	0.2%
<b>Total</b>	<b>396,111</b>	<b>100.0%</b>	<b>208,167</b>	<b>100.0%</b>	<b>18,201</b>	<b>100.0%</b>	<b>14,232</b>	<b>100.0%</b>	<b>9,883</b>	<b>100.0%</b>	<b>1,772</b>	<b>100.0%</b>
<b>Median HH Income</b>	<b>\$43,922</b>		<b>\$34,833</b>		<b>\$68,306</b>		<b>\$67,577</b>		<b>\$69,105</b>		<b>\$22,955</b>	

Sources: Nielsen, 2014; BAE, 2014.

**Table A-4: Means of Transportation to Work, 2010**

<b>Pima County</b>			<b>Tucson</b>			<b>South Tucson</b>		
<b>Means of Transportation</b>	<b>Employed Persons</b>		<b>Means of Transportation</b>	<b>Employed Persons</b>		<b>Means of Transportation</b>	<b>Employed Persons</b>	
	<b>Number</b>	<b>Percentage</b>		<b>Number</b>	<b>Percentage</b>		<b>Number</b>	<b>Percentage</b>
Car, Truck or Van	363,885	86.7%	Car, Truck or Van	196,425	84.3%	Car, Truck or Van	1,129	59.8%
Drove Alone	317,862	75.7%	Drove Alone	169,608	72.8%	Drove Alone	809	42.8%
Carpooled	46,023	11.0%	Carpooled	26,817	11.5%	Carpooled	320	16.9%
Public Transportation (excluding Taxi)	10,513	2.5%	Public Transportation (excluding Taxi)	8,362	3.6%	Public Transportation (excluding Taxi)	266	14.1%
Walked	11,208	2.7%	Walked	8,788	3.8%	Walked	213	11.3%
Taxi, motorcycle, bicycle, or other	13,755	3.3%	Taxi, motorcycle, bicycle, or other	10,123	4.3%	Taxi, motorcycle, bicycle, or other	231	12.2%
Worked at Home	20,310	4.8%	Worked at Home	9,183	3.9%	Worked at Home	50	2.6%
<b>Total Workers</b>	<b>419,671</b>	<b>100.0%</b>	<b>Total</b>	<b>232,881</b>	<b>100.0%</b>	<b>Total</b>	<b>1,889</b>	<b>100.0%</b>

<b>Oro Valley</b>			<b>Marana</b>			<b>Sahuarita</b>		
<b>Means of Transportation</b>	<b>Employed Persons</b>		<b>Means of Transportation</b>	<b>Employed Persons</b>		<b>Means of Transportation</b>	<b>Employed Persons</b>	
	<b>Number</b>	<b>Percentage</b>		<b>Number</b>	<b>Percentage</b>		<b>Number</b>	<b>Percentage</b>
Car, Truck or Van	14,255	89.7%	Car, Truck or Van	12,456	90.5%	Car, Truck or Van	8,352	93.7%
Drove Alone	12,758	80.3%	Drove Alone	11,238	81.7%	Drove Alone	7,198	80.7%
Carpooled	1,497	9.4%	Carpooled	1,218	8.9%	Carpooled	1,154	12.9%
Public Transportation (excluding Taxi)	42	0.3%	Public Transportation (excluding Taxi)	57	0.4%	Public Transportation (excluding Taxi)	0	0.0%
Walked	112	0.7%	Walked	148	1.1%	Walked	51	0.6%
Taxi, motorcycle, bicycle, or other	280	1.8%	Taxi, motorcycle, bicycle, or other	317	2.3%	Taxi, motorcycle, bicycle, or other	77	0.9%
Worked at Home	1,199	7.5%	Worked at Home	780	5.7%	Worked at Home	436	4.9%
<b>Total</b>	<b>15,888</b>	<b>100.0%</b>	<b>Total</b>	<b>13,758</b>	<b>100.0%</b>	<b>Total</b>	<b>8,916</b>	<b>100.0%</b>

Notes:

(a) The American Community Survey (ACS) publishes demographic estimates based on statistical sampling conducted between 2006-2010.

Sources: ACS 2006-2010; BAE, 2014.

**Table A-5: Household Tenure, 2014**

Tenure	Pima County		Tucson		Oro Valley		Marana		Sahuarita		South Tucson	
	#	%	#	%	#	%	#	%	#	%	#	%
Owners	253,849	64.1%	108,167	52.0%	14,248	78.3%	11,656	81.9%	8,022	81.2%	646	36.5%
Renters	142,262	35.9%	100,000	48.0%	3,953	21.7%	2,576	18.1%	1,861	18.8%	1,126	63.5%
<b>Total Households</b>	<b>396,111</b>	<b>100.0%</b>	<b>208,167</b>	<b>100.0%</b>	<b>18,201</b>	<b>100.0%</b>	<b>14,232</b>	<b>100.0%</b>	<b>9,883</b>	<b>100.0%</b>	<b>1,772</b>	<b>100.0%</b>

Sources: Nielsen, 2014; BAE, 2014.

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**Table A-6: Housing Units by Type of Structure, 2014**

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<u>Type of Residence (a)</u>	<u>Pima County</u>	<u>Tucson</u>	<u>Oro Valley</u>	<u>Marana</u>	<u>Sahuarita</u>	<u>South Tucson</u>
Single Family Detached	59.1%	51.5%	76.1%	85.7%	87.8%	52.8%
Single Family Attached	7.8%	8.2%	7.7%	1.7%	2.9%	11.4%
Multifamily 2-4 Units	4.8%	7.4%	1.8%	0.7%	0.4%	12.2%
Multifamily 5-19 Units	9.3%	13.2%	8.3%	4.0%	3.5%	8.4%
Multifamily 20-49 Units	3.7%	6.0%	1.6%	0.0%	0.3%	4.6%
Multifamily 50+	4.5%	6.3%	2.5%	1.4%	2.2%	6.7%
Mobile Home (c)	<u>10.9%</u>	<u>7.3%</u>	<u>2.0%</u>	<u>6.6%</u>	<u>3.1%</u>	<u>4.0%</u>
<b>Total</b>	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
<b>Multifamily Housing Units</b>	<b>22.2%</b>	<b>33.0%</b>	<b>14.2%</b>	<b>6.1%</b>	<b>6.3%</b>	<b>31.9%</b>

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Note:

(a) All figures represent percent of total housing units in each category.

Sources: Nielsen, 2014; BAE, 2014.

**Table A-7: Building Permits Issued, Pima County, 2000 - 2013**

<b>Pima County</b>														
	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
<b>Building Type (#)</b>														
Single-Family	6,816	6,298	6,114	7,598	9,604	11,166	8,132	4,698	2,743	1,934	1,726	1,388	2,175	2,329
Multi-Family	963	1,174	1,033	312	917	478	390	539	478	195	212	854	666	690
Two to Four Family	337	165	179	195	197	321	212	142	55	28	6	26	38	32
Five or More Family	626	1,009	854	117	720	157	178	397	423	167	206	828	628	658
<b>Total</b>	<b>7,779</b>	<b>7,472</b>	<b>7,147</b>	<b>7,910</b>	<b>10,521</b>	<b>11,644</b>	<b>8,522</b>	<b>5,237</b>	<b>3,221</b>	<b>2,129</b>	<b>1,938</b>	<b>2,242</b>	<b>2,841</b>	<b>3,019</b>
<b>Building Type (%)</b>														
Single-Family	87.6%	84.3%	85.5%	96.1%	91.3%	95.9%	95.4%	89.7%	85.2%	90.8%	89.1%	61.9%	76.6%	77.1%
Multi-Family	12.4%	15.7%	14.5%	3.9%	8.7%	4.1%	4.6%	10.3%	14.8%	9.2%	10.9%	38.1%	23.4%	22.9%
Two to Four Family	4.3%	2.2%	2.5%	2.5%	1.9%	2.8%	2.5%	2.7%	1.7%	1.3%	0.3%	1.2%	1.3%	1.1%
Five or More Family	8.0%	13.5%	11.9%	1.5%	6.8%	1.3%	2.1%	7.6%	13.1%	7.8%	10.6%	36.9%	22.1%	21.8%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>% Change, 2000-11</b>														
Single-Family		-7.6%	-2.9%	24.3%	26.4%	16.3%	-27.2%	-42.2%	-41.6%	-29.5%	-10.8%	-19.6%	56.7%	7.1%
Multi-Family		21.9%	-12.0%	-69.8%	193.9%	N/A	-18.4%	38.2%	-11.3%	-59.2%	8.7%	302.8%	-22.0%	3.6%
Two to Four Family		-51.0%	8.5%	8.9%	1.0%	62.9%	-34.0%	-33.0%	-61.3%	-49.1%	-78.6%	333.3%	46.2%	-15.8%
Five or More Family		61.2%	-15.4%	-86.3%	515.4%	-78.2%	13.4%	123.0%	6.5%	-60.5%	23.4%	301.9%	-24.2%	4.8%
<b>Total</b>		<b>-3.9%</b>	<b>-4.3%</b>	<b>10.7%</b>	<b>33.0%</b>	<b>10.7%</b>	<b>-26.8%</b>	<b>-38.5%</b>	<b>-38.5%</b>	<b>-33.9%</b>	<b>-9.0%</b>	<b>15.7%</b>	<b>26.7%</b>	<b>6.3%</b>

**Table A-7: Building Permits Issued, Pima County, 2000 – 2013, Continued**

<b>Tucson</b>														
	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
<b>Building Type (#) (a)</b>														
Single-Family	2,764	2,564	2,407	2,425	2,243	2,421	2,297	1,131	565	362	344	302	426	447
Multi-Family	785	692	791	312	908	370	284	238	69	180	44	572	666	690
Two to Four Family	305	165	175	195	194	267	163	102	55	28	6	26	38	32
Five or More Family	480	527	616	117	714	103	121	136	14	152	38	546	628	658
<b>Total</b>	<b>3,549</b>	<b>3,256</b>	<b>3,198</b>	<b>2,737</b>	<b>3,151</b>	<b>2,791</b>	<b>2,581</b>	<b>1,369</b>	<b>634</b>	<b>542</b>	<b>388</b>	<b>874</b>	<b>1,092</b>	<b>1,137</b>
<b>Building Type (%)</b>														
Single-Family	77.9%	78.7%	75.3%	88.6%	71.2%	86.7%	89.0%	82.6%	89.1%	66.8%	88.7%	34.6%	39.0%	39.3%
Multi-Family	22.1%	21.3%	24.7%	11.4%	28.8%	13.3%	11.0%	17.4%	10.9%	33.2%	11.3%	65.4%	61.0%	60.7%
Two to Four Family	8.6%	5.1%	5.5%	7.1%	6.2%	9.6%	6.3%	7.5%	8.7%	5.2%	1.5%	3.0%	3.5%	2.8%
Five or More Family	13.5%	16.2%	19.3%	4.3%	22.7%	3.7%	4.7%	9.9%	2.2%	28.0%	9.8%	62.5%	57.5%	57.9%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>% Change, 2000-11</b>														
Single-Family		-7.2%	-6.1%	0.7%	-7.5%	7.9%	-5.1%	-50.8%	-50.0%	-35.9%	-5.0%	-12.2%	41.1%	4.9%
Multi-Family		-11.8%	14.3%	-60.6%	191.0%	N/A	-23.2%	-16.2%	-71.0%	160.9%	-75.6%	1200.0%	16.4%	3.6%
Two to Four Family		-45.9%	6.1%	11.4%	-0.5%	37.6%	-39.0%	-37.4%	-46.1%	-49.1%	-78.6%	333.3%	46.2%	-15.8%
Five or More Family		9.8%	16.9%	-81.0%	510.3%	-85.6%	17.5%	12.4%	-89.7%	985.7%	-75.0%	1336.8%	15.0%	4.8%
<b>Total</b>		<b>-8.3%</b>	<b>-1.8%</b>	<b>-14.4%</b>	<b>15.1%</b>	<b>-11.4%</b>	<b>-7.5%</b>	<b>-47.0%</b>	<b>-53.7%</b>	<b>-14.5%</b>	<b>-28.4%</b>	<b>125.3%</b>	<b>24.9%</b>	<b>4.1%</b>

**Table A-7: Building Permits Issued, Pima County, 2000 – 2013, Continued**

<b>Oro Valley</b>														
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
<b>Building Type (#) (a)</b>														
Single-Family	994	738	429	496	490	356	354	334	228	60	57	59	167	134
Multi-Family	0	0	0	0	0	54	0	0	0	0	0	0	0	0
<b>Total</b>	<b>994</b>	<b>738</b>	<b>429</b>	<b>496</b>	<b>490</b>	<b>410</b>	<b>354</b>	<b>334</b>	<b>228</b>	<b>60</b>	<b>57</b>	<b>59</b>	<b>167</b>	<b>134</b>
<b>Building Type (%)</b>														
Single-Family	100.0%	100.0%	100.0%	100.0%	100.0%	86.8%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Multi-Family	0.0%	0.0%	0.0%	0.0%	0.0%	13.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>% Change, 2000-11</b>														
Single-Family		-25.8%	-41.9%	15.6%	-1.2%	-27.3%	-0.6%	-5.6%	-31.7%	-73.7%	-5.0%	3.5%	183.1%	-19.8%
Multi-Family		n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
<b>Total</b>		<b>-25.8%</b>	<b>-41.9%</b>	<b>15.6%</b>	<b>-1.2%</b>	<b>-16.3%</b>	<b>-13.7%</b>	<b>-5.6%</b>	<b>-31.7%</b>	<b>-73.7%</b>	<b>-5.0%</b>	<b>3.5%</b>	<b>183.1%</b>	<b>-19.8%</b>
<b>Marana</b>														
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
<b>Building Type (#) (a)</b>														
Single-Family	689	772	960	1,206	1,398	1,771	806	579	256	199	343	337	706	632
Multi-Family	0	290	80	0	0	0	0	0	0	0	168	0	0	0
<b>Total</b>	<b>689</b>	<b>1,062</b>	<b>1,040</b>	<b>1,206</b>	<b>1,398</b>	<b>1,771</b>	<b>806</b>	<b>579</b>	<b>256</b>	<b>199</b>	<b>511</b>	<b>337</b>	<b>706</b>	<b>632</b>
<b>Building Type (%)</b>														
Single-Family	100.0%	72.7%	92.3%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	67.1%	100.0%	100.0%	100.0%
Multi-Family	0.0%	27.3%	7.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	32.9%	0.0%	0.0%	0.0%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>% Change, 2000-11</b>														
Single-Family		12.0%	24.4%	25.6%	15.9%	26.7%	-54.5%	-28.2%	-55.8%	-22.3%	72.4%	-1.7%	109.5%	-10.5%
Multi-Family		n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
<b>Total</b>		<b>54.1%</b>	<b>-2.1%</b>	<b>16.0%</b>	<b>15.9%</b>	<b>26.7%</b>	<b>-54.5%</b>	<b>-28.2%</b>	<b>-55.8%</b>	<b>-22.3%</b>	<b>156.8%</b>	<b>-34.1%</b>	<b>109.5%</b>	<b>-10.5%</b>

**Table A-7: Building Permits Issued, Pima County, 2000 – 2013, Continued**

<b>Sahuarita</b>														
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
<b>Building Type (#) (a)</b>														
Single-Family	0	0	0	411	1,697	1,634	1,263	848	749	517	306	187	283	254
Multi-Family	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>411</b>	<b>1,697</b>	<b>1,634</b>	<b>1,263</b>	<b>848</b>	<b>749</b>	<b>517</b>	<b>306</b>	<b>187</b>	<b>283</b>	<b>254</b>
<b>Building Type (%)</b>														
Single-Family	n/a	n/a	n/a	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Multi-Family	n/a	n/a	n/a	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Total</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>% Change, 2000-11</b>														
Single-Family		n/a	n/a	n/a	312.9%	-3.7%	-22.7%	-32.9%	-11.7%	-31.0%	-40.8%	-38.9%	51.3%	-10.2%
Multi-Family		n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
<b>Total</b>		<b>#DIV/0!</b>	<b>#DIV/0!</b>	<b>#DIV/0!</b>	<b>312.9%</b>	<b>-3.7%</b>	<b>-22.7%</b>	<b>-32.9%</b>	<b>-11.7%</b>	<b>-31.0%</b>	<b>-40.8%</b>	<b>-38.9%</b>	<b>51.3%</b>	<b>-10.2%</b>
<b>South Tucson</b>														
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
<b>Building Type (#) (a)</b>														
Single-Family	11	11	8	18	15	16	8	11	5	1	2	4	5	5
Multi-Family	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total</b>	<b>11</b>	<b>11</b>	<b>8</b>	<b>18</b>	<b>15</b>	<b>16</b>	<b>8</b>	<b>11</b>	<b>5</b>	<b>1</b>	<b>2</b>	<b>4</b>	<b>5</b>	<b>5</b>
<b>Building Type (%)</b>														
Single-Family	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Multi-Family	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>% Change, 2000-11</b>														
Single-Family		0.0%	-27.3%	125.0%	-16.7%	6.7%	-50.0%	37.5%	-54.5%	-80.0%	100.0%	100.0%	25.0%	0.0%
Multi-Family		n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
<b>Total</b>		<b>0.0%</b>	<b>-27.3%</b>	<b>125.0%</b>	<b>-16.7%</b>	<b>6.7%</b>	<b>-50.0%</b>	<b>37.5%</b>	<b>-54.5%</b>	<b>-80.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>25.0%</b>	<b>0.0%</b>

Notes:

Sources: U.S. Census Bureau, Building Permit Trends, 2014; BAE, 2014.



**Table A-8: Rental Market Overview, Eastern Pima County  
Sample, 4<sup>th</sup> Quarter 2013**

	<b>Avg. Rental Rate</b>	<b>Avg. Unit Size (sq. ft.)</b>	<b>Number of Units</b>	<b>% Total Units</b>
Studio	\$437	397	2,087	4.9%
1-Bedroom	\$555	600	21,836	50.8%
2-Bedroom	\$739	917	16,049	37.4%
3-Bedroom	\$918	1,122	2,592	6.0%
4-Bedroom	\$1,310	1,328	394	0.9%
<b>Total</b>	<b>\$647</b>	<b>873</b>	<b>42,958</b>	<b>100.0%</b>

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**Table A-9: Rental Rates, Vacancy, and Absorption Trends, Eastern Pima Co., 2005 - 2013**

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	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>
Avg. rent	\$620	\$639	\$660	\$662	\$639	\$626	\$629	\$641	\$647
% change		3.1%	3.3%	0.3%	-3.5%	-2.0%	0.5%	1.9%	0.9%
Vacancy rate	7.0%	5.0%	6.4%	8.4%	10.9%	10.1%	9.0%	9.7%	9.2%
% change		-28.6%	28.0%	31.3%	29.8%	-7.3%	-10.9%	7.8%	-5.2%
Net absorption (units)	338	844	-591	-844	-1,055	295	741	167	215
% change		149.7%	-170.0%	42.8%	25.0%	-128.0%	151.2%	-77.5%	28.7%

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Note: Figures reflect data from the fourth quarter of 2013 for a sample of 43,000 existing rental apartment units in Eastern Pima County provided by RealFacts.

Sources: RealFacts, 2014; BAE, 2014.

**Table A-10: Recent Market Comparables, Eastern Pima County Sample, 2011-2013**

	<b>Avg. Rental Rate (\$/mo)</b>	<b>Avg. Unit Size (sq. ft.)</b>	<b>Number of Units</b>	<b>% Total Units</b>
Studio	n/a	n/a	n/a	n/a
1-Bedroom	\$898	761	394	38%
2-Bedroom	\$1,117	1,048	540	52%
3-Bedroom	\$1,356	1,253	108	10%
4-Bedroom	n/a	n/a	n/a	n/a
<b>Total/Avg.</b>	<b>\$1,124</b>	<b>1,021</b>	<b>1042</b>	<b>100%</b>

Notes:

Figures reflect projects completed between 2011 and 2013 in Eastern Pima County according to RealFacts. In this period, no studios or 4-bedroom apartments were built.

Sources: RealFacts 2014; BAE 2014

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**Table A-11: Sale Price Distribution, Eastern Pima County, 2013 (a)**

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	<b>Single-Family Residence</b>	<b>Condominium/ Townhouse</b>	<b>Total Units</b>	<b>% Total Units</b>
Less than \$99,999	1,445	784	2,229	18%
\$100,000-\$199,999	5,002	726	5,728	45%
\$200,000-\$299,999	2,482	205	2,687	21%
\$300,000-\$399,999	981	53	1,034	8%
\$400,000-\$499,999	442	25	467	4%
\$500,000-\$749,999	370	6	376	3%
\$750,000 or more	173	0	173	1%
<b>Total</b>	<b>10,895</b>	<b>1,799</b>	<b>12,694</b>	<b>100%</b>
<b>Average Sale Price</b>	<b>\$218,715</b>	<b>\$157,485</b>	<b>\$195,953</b>	

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**Notes:**

(a) All figures represent sales reported to the Tucson Multiple Listing Service (MLS) in the submarket areas corresponding to the Eastern Pima County Market Area; MLS sales data do not include all real estate activity and do not include unrepresented sales or a substantial portion of new home sales.

Sources: Tucson Association of Realtors, MLS, 2013; BAE, 2014.

**Table A-12: Sale Price Distribution, Eastern Pima County,  
March 2013 – March 2014 – New Units (a)**

	Single-Family Residence	Condominium/ Townhouse	Total Units	% Total Units
Less than \$99,999	7	1	8	3%
\$100,000-\$199,999	114	0	114	43%
\$200,000-\$299,999	102	3	105	39%
\$300,000-\$399,999	23	0	23	9%
\$400,000-\$499,999	5	0	5	2%
\$500,000-\$749,999	7	1	8	3%
\$750,000 or more	3	0	3	1%
<b>Total</b>	<b>261</b>	<b>5</b>	<b>266</b>	<b>100%</b>
<b>Average Sale Price</b>	<b>\$232,961</b>	(b)	<b>\$233,642</b>	

Notes:

(a) All figures represent full and verified sales recorded by the Pima County Assessor between March 1, 2013 and February 28, 2014, as provided by DataQuick

(b) Average is not presented for new condominium sales, due to insufficient recorded sales

Sources: DataQuick, 2014; BAE, 2014.

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**Table A-13: Percent of Households with Cost Burden, 2012**

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	Households paying over 30 % of income on housing costs					
	<u>Pima County</u>	<u>Tucson</u>	<u>Oro Valley</u>	<u>Marana</u>	<u>Sahuarita</u>	<u>S. Tucson</u>
Owner households w/ cost burden	72,359	32,663	3,436	2,967	1,585	207
Renter households w/ cost burden	69,284	52,216	1,521	1,023	503	728
<b>Total cost-burdened households</b>	<b>141,643</b>	<b>84,879</b>	<b>4,957</b>	<b>3,990</b>	<b>2,088</b>	<b>935</b>
Total owner households (a)	243,444	104,132	12,638	9,804	7,252	535
Total renter households (a)	129,394	91,862	3,960	2,806	1,522	1,142
<b>Total households (a)</b>	<b>372,838</b>	<b>195,994</b>	<b>16,598</b>	<b>12,610</b>	<b>8,774</b>	<b>1,677</b>
% Total owner households w/ cost burden	29.7%	31.4%	27.2%	30.3%	21.9%	38.7%
% Total renter households w/ cost-burden	53.5%	56.8%	38.4%	36.5%	33.0%	63.7%
<b>% Total households cost-burdened</b>	<b>38.0%</b>	<b>43.3%</b>	<b>29.9%</b>	<b>31.6%</b>	<b>23.8%</b>	<b>55.8%</b>

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**Notes:**

The American Community Survey (ACS) publishes demographic estimates based on statistical sampling conducted continuously between 2008 and 2012.

(a) Total household figures presented represent only those households for which monthly housing costs were computed in published ACS data; for Pima County less than 1 percent of owner households and 7 percent of renter households were not

Sources: Table DP04, ACS 2008-2012; BAE, 2014.

# APPENDIX B: LIST OF HOUSING DEVELOPER INTERVIEWEES

**Table B-1: Regional Housing Developers Interview Summary**

<b>Completed Telephone Interviews</b>		
<b><u>Developers:</u></b>	<b><u>Active Markets</u></b>	<b><u>Interview Date</u></b>
Gorman & Company, Inc.	Maricopa +	2/7/2014
Doucette Homes	Pima	2/18/2014
Tofel Construction	Pima	3/7/2014
Holualoa Companies	Pima	2/11/2014
Peach Properties	Pima	2/28/2014
Rancho Sahuarita Companies	Sahuarita	2/20/2014
Mark-Taylor	Phoenix (also Oro Valley)	2/4/2014
<b><u>Non-Profit Developers/Organizations</u></b>		
Habitat for Humanity Tucson	Pima	2/7/2014
Family Housing Resources	Pima	3/4/2014
Primavera Foundation	Pima	2/28/2014
Catholic Community Services	Pima	2/14/2014
CDP Housing	Pima	2/21/2014
La Frontera Partners	Pima	2/13/2014

Source: BAE, 2014.

## APPENDIX C: TOD HOUSING DEMAND TABLES

**Table C-1: TOD Housing Demand by Tenure and Type, Eastern Pima Co., 2015 - 2045**

	Renter					Owner					Grand Total
	Elderly	Small	Large	All		Elderly	Small	Large	All		
		Related	Related	Other	Total		Related	Related	Other	Total	
2015 (a)	7,827	14,880	3,144	18,035	43,886	4,661	10,927	2,331	2,631	20,549	64,435
2020 (b)	1,644	780	165	946	3,535	979	573	122	138	1,812	5,347
2025	1,748	790	167	958	3,662	1,041	580	124	140	1,884	5,547
2030	1,400	830	175	1,005	3,410	833	609	130	147	1,719	5,129
2035	749	1,095	231	1,327	3,402	446	804	171	194	1,615	5,017
2040	580	1,175	248	1,425	3,428	345	863	184	208	1,600	5,028
2045	427	1,263	267	1,531	3,488	254	927	198	223	1,603	5,090
<b>Total</b>	<b>14,375</b>	<b>20,812</b>	<b>4,398</b>	<b>25,225</b>	<b>64,811</b>	<b>8,560</b>	<b>15,283</b>	<b>3,260</b>	<b>3,680</b>	<b>30,783</b>	<b>95,594</b>

Notes:

(a) Figures for 2015 represent the existing pent-up demand based on 2008 - 2012 PUMS and adjusted according to State population forecast

(b) Figures for 2020 and all subsequent years represent the additions TOD housing demand from new households for each five-year increment based on State population forecast

Sources: 2008-2012 American Community Survey (ACS) Public Use Microdata Sample (PUMS); Arizona Department of Administration, Office of Employment and Population Statistics, 2013; BAE, 2014.



**Table C-2: TOD Housing Demand by AMI level, Eastern Pima Co., 2015 – 2045**

	Income Level (All Households)						Total TOD Demand
	Extremely Low, Very Low, and Low Income			Moderate Income			
	below 30% AMI	30 to 50% AMI	50 to 80% AMI	80 to 100% AMI	100 to 120% AMI	above 120% AMI	
2015 (a)	19,534	11,746	12,004	5,285	4,092	11,775	64,435
2020 (b)	1,671	1,148	978	422	308	821	5,347
2025	1,736	1,198	1,014	437	318	845	5,547
2030	1,594	1,070	941	408	301	815	5,129
2035	1,528	939	932	409	314	895	5,017
2040	1,523	911	937	413	320	924	5,028
2045	1,534	895	952	421	329	960	5,090
<b>Total</b>	<b>29,119</b>	<b>17,906</b>	<b>17,757</b>	<b>7,794</b>	<b>5,983</b>	<b>17,034</b>	<b>95,594</b>
<i>% total</i>	<i>30.5%</i>	<i>18.7%</i>	<i>18.6%</i>	<i>8.2%</i>	<i>6.3%</i>	<i>17.8%</i>	

Notes:

(a) Figures for 2015 represent the existing pent-up demand based on 2008 - 2012 PUMS and adjusted according to State population forecast

(b) Figures for 2020 and all subsequent years represent the additional TOD housing demand from new households for each five-year increment based on State population forecast

Sources: 2008-2012 American Community Survey (ACS) Public Use Microdata Sample (PUMS); Arizona Department of Administration, Office of Employment and Population Statistics, 2013; BAE, 2014.

**Table C-3: Pima County and Market Area Households by Household Type and Income Level, 2015**

Total County Households	Renter					Owner					Total Households
	Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
Household by Type and Income											
Household Income <=30% MFI	5,327	11,256	3,020	17,828	37,431	7,072	4,485	1,212	4,766	17,535	54,966
Household Income >30 to <=50% MFI	4,675	9,120	2,138	9,936	25,870	12,158	6,183	2,313	3,752	24,406	50,276
Household Income >50 to <=80% MFI	4,165	11,680	2,258	13,132	31,235	17,327	12,047	3,267	6,643	39,283	70,518
Household Income >80% MFI to <=100% MFI	1,776	5,938	1,043	5,870	14,627	9,650	9,587	2,097	4,405	25,739	40,366
Household Income >100% MFI to <=120% MFI	1,507	4,457	786	4,184	10,935	8,343	10,165	2,196	4,301	25,006	35,941
Household Income >120% MFI	3,266	10,501	1,391	10,478	25,636	33,801	66,466	8,261	17,408	125,935	151,570
<b>Total Households</b>	<b>20,716</b>	<b>52,953</b>	<b>10,636</b>	<b>61,428</b>	<b>145,734</b>	<b>88,350</b>	<b>108,933</b>	<b>19,346</b>	<b>41,275</b>	<b>257,904</b>	<b>403,638</b>

All Households in Market Area
Household by Type and Income
Household Income <=30% MFI
Household Income >30 to <=50% MFI
Household Income >50 to <=80% MFI
Household Income >80% MFI to <=100% MFI
Household Income >100% MFI to <=120% MFI
Household Income >120% MFI
<b>Total Households</b>

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Total Renters	Owner					Total Households
	Elderly	Small Related	Large Related	All Other	Total Owners	
38,188	6,359	3,698	947	4,226	15,230	53,418
26,594	10,432	5,272	1,938	3,153	20,794	47,388
31,822	14,966	10,322	2,736	6,289	34,313	66,134
14,800	8,279	8,406	1,485	4,114	22,283	37,083
11,000	6,881	9,243	1,743	3,940	21,807	32,807
25,494	30,362	61,869	7,226	15,827	115,283	140,778
<b>147,897</b>	<b>77,279</b>	<b>98,809</b>	<b>16,075</b>	<b>37,548</b>	<b>229,710</b>	<b>377,607</b>

Transit Demand Households in Market Area
Household by Type and Income
Household Income <=30% MFI
Household Income >30 to <=50% MFI
Household Income >50 to <=80% MFI
Household Income >80% MFI to <=100% MFI
Household Income >100% MFI to <=120% MFI
Household Income >120% MFI
<b>Total Households</b>

Elderly	Renter				Total Renters	Owner					Total Households
	Small Related	Large Related	All Other	Elderly		Small Related	Large Related	All Other	Total Owners		
3,055	4,500	962	8,526	17,044	1,048	633	182	628	2,491	19,534	
2,050	2,686	706	3,358	8,801	1,324	1,013	295	313	2,945	11,746	
1,279	3,286	673	3,201	8,439	932	1,557	638	438	3,565	12,004	
506	1,502	202	796	3,006	412	1,296	292	279	2,279	5,285	
451	849	301	772	2,373	140	1,145	226	208	1,719	4,092	
486	2,057	300	1,381	4,224	805	5,281	699	765	7,550	11,775	
<b>7,827</b>	<b>14,880</b>	<b>3,144</b>	<b>18,035</b>	<b>43,886</b>	<b>4,661</b>	<b>10,927</b>	<b>2,331</b>	<b>2,631</b>	<b>20,549</b>	<b>64,435</b>	

Transit Demand Households in Market Area Housing Cost Burden > 30%
Household by Type and Income
Household Income <=30% MFI
Household Income >30 to <=50% MFI
Household Income >50 to <=80% MFI
Household Income >80% MFI to <=100% MFI
Household Income >100% MFI to <=120% MFI
Household Income >120% MFI
<b>Total Households</b>

Elderly	Renter				Total Renters	Owner					Total Households
	Small Related	Large Related	All Other	Elderly		Small Related	Large Related	All Other	Total Owners		
2,100	3,813	818	6,892	13,623	769	490	118	491	1,868	15,491	
1,829	2,204	527	2,827	7,386	709	508	227	174	1,617	9,003	
693	1,084	207	1,089	3,072	219	802	260	175	1,455	4,527	
272	230	13	117	632	84	528	89	41	742	1,374	
260	-	34	-	295	-	200	60	41	301	596	
166	-	-	-	166	96	418	45	54	613	779	
<b>5,319</b>	<b>7,331</b>	<b>1,599</b>	<b>10,924</b>	<b>25,173</b>	<b>1,877</b>	<b>2,945</b>	<b>798</b>	<b>976</b>	<b>6,596</b>	<b>31,770</b>	

**Table C-4: Pima County and Market Area Households by Household Type and Income**

Total County Households	Renter					Owner					Total Households
	Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
Household by Type and Income											
Household Income <=30% MFI	6,429	11,804	3,167	18,697	40,097	8,535	4,703	1,271	4,999	19,508	59,605
Household Income >30 to <=50% MFI	5,643	9,565	2,242	10,420	27,869	14,674	6,484	2,426	3,935	27,519	55,388
Household Income >50 to <=80% MFI	5,027	12,249	2,368	13,771	33,415	20,912	12,633	3,426	6,966	43,938	77,353
Household Income >80% MFI to <=100% MFI	2,143	6,228	1,094	6,156	15,620	11,646	10,054	2,199	4,620	28,519	44,139
Household Income >100% MFI to <=120% MFI	1,819	4,674	824	4,388	11,706	10,070	10,660	2,303	4,510	27,544	39,250
Household Income >120% MFI	3,942	11,012	1,459	10,988	27,401	40,795	69,702	8,663	18,255	137,415	164,816
<b>Total Households</b>	<b>25,003</b>	<b>55,532</b>	<b>11,154</b>	<b>64,419</b>	<b>156,108</b>	<b>106,633</b>	<b>114,237</b>	<b>20,288</b>	<b>43,285</b>	<b>284,443</b>	<b>440,551</b>

**Level, 2020**

All Households in Market Area	Renter					Owner					Total Households
	Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
Household by Type and Income											
Household Income <=30% MFI	6,622	11,967	2,852	19,612	41,052	7,695	3,892	997	4,447	17,031	58,083
Household Income >30 to <=50% MFI	5,716	9,745	2,131	11,140	28,733	12,622	5,548	2,039	3,318	23,528	52,260
Household Income >50 to <=80% MFI	5,018	12,035	2,207	14,883	34,144	18,109	10,863	2,879	6,618	38,470	72,614
Household Income >80% MFI to <=100% MFI	2,271	6,223	902	6,475	15,872	10,017	8,846	1,563	4,329	24,756	40,628
Household Income >100% MFI to <=120% MFI	1,785	4,713	836	4,475	11,809	8,326	9,728	1,834	4,147	24,035	35,844
Household Income >120% MFI	4,156	10,596	1,171	11,450	27,372	36,738	65,113	7,605	16,657	126,113	153,485
<b>Total Households</b>	<b>25,568</b>	<b>55,280</b>	<b>10,099</b>	<b>68,036</b>	<b>158,982</b>	<b>93,507</b>	<b>103,991</b>	<b>16,918</b>	<b>39,517</b>	<b>253,932</b>	<b>412,914</b>

Transit Demand Households in Market Area	Renter					Owner					Total Households
	Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
Household by Type and Income											
Household Income <=30% MFI	3,697	4,736	1,013	8,973	18,419	1,268	666	191	661	2,786	21,205
Household Income >30 to <=50% MFI	2,481	2,827	743	3,534	9,585	1,602	1,066	311	329	3,308	12,894
Household Income >50 to <=80% MFI	1,547	3,458	708	3,369	9,083	1,127	1,639	671	461	3,899	12,981
Household Income >80% MFI to <=100% MFI	612	1,581	212	838	3,243	499	1,364	307	293	2,464	5,707
Household Income >100% MFI to <=120% MFI	546	893	317	813	2,569	170	1,205	237	219	1,831	4,400
Household Income >120% MFI	588	2,165	316	1,454	4,522	974	5,558	736	805	8,073	12,595
<b>Total Households</b>	<b>9,471</b>	<b>15,660</b>	<b>3,309</b>	<b>18,980</b>	<b>47,421</b>	<b>5,640</b>	<b>11,500</b>	<b>2,453</b>	<b>2,769</b>	<b>22,361</b>	<b>69,782</b>

Transit Demand Households in Market Area Housing Cost Burden > 30%	Renter					Owner					Total Households
	Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
Household by Type and Income											
Household Income <=30% MFI	2,541	4,013	861	7,253	14,668	930	516	124	517	2,087	16,755
Household Income >30 to <=50% MFI	2,213	2,320	554	2,975	8,062	858	534	239	183	1,813	9,875
Household Income >50 to <=80% MFI	838	1,141	217	1,146	3,342	265	844	273	184	1,566	4,908
Household Income >80% MFI to <=100% MFI	329	242	14	123	709	102	555	93	43	794	1,502
Household Income >100% MFI to <=120% MFI	315	-	36	-	351	-	210	63	43	317	668
Household Income >120% MFI	200	-	-	-	200	116	440	47	57	661	861
<b>Total Households</b>	<b>6,436</b>	<b>7,716</b>	<b>1,683</b>	<b>11,497</b>	<b>27,332</b>	<b>2,271</b>	<b>3,099</b>	<b>840</b>	<b>1,028</b>	<b>7,238</b>	<b>34,569</b>

**Table C-5: Pima County and Market Area Households by Household Type and Income**

**Total County Households**

**Household by Type and Income**

Household Income <=30% MFI  
 Household Income >30 to <=50% MFI  
 Household Income >50 to <=80% MFI  
 Household Income >80% MFI to <=100% MFI  
 Household Income >100% MFI to <=120% MFI  
 Household Income >120% MFI

Renter					Owner					Total Households
Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
7,546	12,273	3,293	19,440	42,552	10,017	4,890	1,321	5,197	21,426	63,977
6,622	9,945	2,331	10,834	29,732	17,222	6,742	2,522	4,091	30,578	60,310
5,900	12,736	2,462	14,318	35,416	24,544	13,135	3,562	7,243	48,485	83,901
2,515	6,475	1,137	6,400	16,528	13,669	10,454	2,287	4,803	31,212	47,740
2,135	4,860	857	4,562	12,415	11,818	11,084	2,395	4,689	29,987	42,402
4,626	11,450	1,517	11,424	29,017	47,880	72,472	9,007	18,981	148,340	177,357

**Total Households**

**29,346    57,738    11,597    66,979    165,660    125,151    118,777    21,095    45,005    310,027    475,687**

**Level,**

**All Households in Market Area**

**Household by Type and Income**

Household Income <=30% MFI  
 Household Income >30 to <=50% MFI  
 Household Income >50 to <=80% MFI  
 Household Income >80% MFI to <=100% MFI  
 Household Income >100% MFI to <=120% MFI  
 Household Income >120% MFI

Renter					Owner					Total Households
Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
7,844	12,570	2,996	20,601	44,011	9,115	4,088	1,047	4,672	18,922	62,933
6,771	10,237	2,239	11,702	30,948	14,952	5,828	2,142	3,485	26,407	57,356
5,944	12,642	2,318	15,634	36,539	21,451	11,411	3,024	6,952	42,839	79,378
2,690	6,537	948	6,802	16,977	11,866	9,293	1,642	4,548	27,348	44,325
2,114	4,951	878	4,701	12,644	9,863	10,218	1,927	4,356	26,363	39,008
4,923	11,131	1,230	12,027	29,310	43,518	68,398	7,989	17,497	137,401	166,712

**Total Households**

**30,286    58,068    10,609    71,468    170,431    110,763    109,237    17,771    41,510    279,281    449,712**

**2025**

**Transit Demand Households in Market Area**

**Household by Type and Income**

Household Income <=30% MFI  
 Household Income >30 to <=50% MFI  
 Household Income >50 to <=80% MFI  
 Household Income >80% MFI to <=100% MFI  
 Household Income >100% MFI to <=120% MFI  
 Household Income >120% MFI

Renter					Owner					Total Households
Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
4,379	4,975	1,064	9,426	19,844	1,502	700	201	694	3,097	22,941
2,939	2,970	781	3,712	10,401	1,898	1,120	326	346	3,690	14,092
1,833	3,633	744	3,539	9,748	1,335	1,722	705	484	4,246	13,995
725	1,660	223	880	3,489	591	1,433	322	308	2,655	6,143
647	939	333	854	2,772	201	1,266	249	230	1,946	4,718
696	2,274	332	1,527	4,829	1,154	5,839	773	846	8,611	13,440

**Total Households**

**11,219    16,450    3,476    19,938    51,083    6,681    12,080    2,577    2,908    24,246    75,329**

**Transit Demand Households in Market Area**

*Housing Cost Burden > 30%*

**Household by Type and Income**

Household Income <=30% MFI  
 Household Income >30 to <=50% MFI  
 Household Income >50 to <=80% MFI  
 Household Income >80% MFI to <=100% MFI  
 Household Income >100% MFI to <=120% MFI  
 Household Income >120% MFI

Renter					Owner					Total Households
Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
3,009	4,215	905	7,619	15,748	1,102	542	131	543	2,317	18,066
2,621	2,437	582	3,125	8,765	1,016	561	251	192	2,020	10,785
993	1,198	228	1,204	3,623	314	886	287	193	1,680	5,304
390	255	14	129	788	121	583	98	46	848	1,636
373	-	38	-	411	-	221	67	46	333	744
237	-	-	-	237	138	462	50	60	709	947

**Total Households**

**7,624    8,105    1,767    12,077    29,574    2,690    3,256    882    1,080    7,907    37,481**



**Table C-6: Pima County and Market Area Households by Household Type and Income**

**Total County Households**

**Household by Type and Income**

Household Income <=30% MFI  
 Household Income >30 to <=50% MFI  
 Household Income >50 to <=80% MFI  
 Household Income >80% MFI to <=100% MFI  
 Household Income >100% MFI to <=120% MFI  
 Household Income >120% MFI

Elderly	Renter				Owner					Total Households
	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
8,442	12,815	3,439	20,298	44,993	11,207	5,106	1,380	5,427	23,119	68,112
7,409	10,384	2,434	11,312	31,539	19,268	7,039	2,634	4,272	33,212	64,752
6,601	13,298	2,571	14,950	37,420	27,459	13,715	3,720	7,563	52,456	89,876
2,814	6,761	1,187	6,683	17,445	15,292	10,915	2,388	5,015	33,610	51,055
2,389	5,075	895	4,764	13,122	13,222	11,574	2,501	4,896	32,192	45,315
5,175	11,956	1,584	11,929	30,644	53,565	75,672	9,405	19,819	158,461	189,105

**Total Households**

**32,830    60,288    12,110    69,936    175,164    140,011    124,021    22,026    46,992    333,051    508,215**

**Level, 2030**

**All Households in Market Area**

**Household by Type and Income**

Household Income <=30% MFI  
 Household Income >30 to <=50% MFI  
 Household Income >50 to <=80% MFI  
 Household Income >80% MFI to <=100% MFI  
 Household Income >100% MFI to <=120% MFI  
 Household Income >120% MFI

Elderly	Renter				Owner					Total Households
	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
8,823	13,204	3,147	21,640	46,814	10,252	4,295	1,100	4,907	20,553	67,367
7,615	10,753	2,352	12,293	33,012	16,817	6,122	2,250	3,661	28,850	61,863
6,686	13,280	2,435	16,423	38,823	24,127	11,987	3,177	7,303	46,594	85,417
3,026	6,867	995	7,145	18,033	13,346	9,761	1,725	4,777	29,609	47,642
2,378	5,201	923	4,938	13,439	11,093	10,734	2,024	4,576	28,426	41,865
5,537	11,692	1,292	12,634	31,154	48,947	71,847	8,392	18,379	147,564	178,718

**Total Households**

**34,064    60,997    11,144    75,072    181,276    124,581    114,745    18,667    43,603    301,596    482,872**

**Transit Demand Households in Market Area**

**Household by Type and Income**

Household Income <=30% MFI  
 Household Income >30 to <=50% MFI  
 Household Income >50 to <=80% MFI  
 Household Income >80% MFI to <=100% MFI  
 Household Income >100% MFI to <=120% MFI  
 Household Income >120% MFI

Elderly	Renter				Owner					Total Households
	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
4,926	5,226	1,118	9,901	21,170	1,689	735	211	729	3,365	24,535
3,305	3,119	820	3,900	11,144	2,135	1,176	343	363	4,017	15,162
2,061	3,816	782	3,717	10,376	1,502	1,809	740	509	4,560	14,936
816	1,744	234	924	3,718	665	1,506	339	324	2,833	6,551
727	986	350	897	2,960	226	1,330	262	241	2,059	5,019
783	2,389	348	1,604	5,124	1,298	6,133	812	889	9,131	14,256

**Total Households**

**12,619    17,280    3,651    20,943    54,493    7,514    12,689    2,707    3,055    25,965    80,458**

**Transit Demand Households in Market Area  
 Housing Cost Burden > 30%**

**Household by Type and Income**

Household Income <=30% MFI  
 Household Income >30 to <=50% MFI  
 Household Income >50 to <=80% MFI  
 Household Income >80% MFI to <=100% MFI  
 Household Income >100% MFI to <=120% MFI  
 Household Income >120% MFI

Elderly	Renter				Owner					Total Households
	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
3,385	4,428	950	8,004	16,766	1,239	569	137	570	2,516	19,282
2,948	2,560	612	3,283	9,402	1,143	590	263	202	2,197	11,599
1,117	1,259	240	1,264	3,880	353	931	302	203	1,789	5,668
439	267	15	136	857	136	613	103	48	899	1,757
420	-	40	-	459	-	232	70	48	350	809
267	-	-	-	267	155	485	52	63	756	1,022

**Total Households**

**8,575    8,514    1,857    12,686    31,632    3,026    3,420    927    1,134    8,506    40,138**

**Table C-7: Pima County and Market Area Households by Household Type and Income**

**Total County Households**

**Household by Type and Income**

Household Income <=30% MFI  
 Household Income >30 to <=50% MFI  
 Household Income >50 to <=80% MFI  
 Household Income >80% MFI to <=100% MFI  
 Household Income >100% MFI to <=120% MFI  
 Household Income >120% MFI

Renter					Owner					Total Households
Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
8,885	13,537	3,633	21,443	47,498	11,794	5,394	1,458	5,733	24,379	71,877
7,797	10,969	2,572	11,951	33,289	20,278	7,437	2,782	4,513	35,009	68,298
6,947	14,048	2,716	15,794	39,505	28,899	14,489	3,929	7,989	55,306	94,811
2,962	7,142	1,254	7,060	18,418	16,094	11,531	2,522	5,298	35,445	53,863
2,514	5,361	945	5,032	13,853	13,915	12,226	2,642	5,173	33,956	47,809
5,447	12,630	1,673	12,602	32,352	56,374	79,940	9,935	20,937	167,187	199,539

**Total Households**

**34,552    63,689    12,793    73,881    184,914    147,354    131,017    23,268    49,643    351,283    536,197**

**Level,**

**All Households in Market Area**

**Household by Type and Income**

Household Income <=30% MFI  
 Household Income >30 to <=50% MFI  
 Household Income >50 to <=80% MFI  
 Household Income >80% MFI to <=100% MFI  
 Household Income >100% MFI to <=120% MFI  
 Household Income >120% MFI

Renter					Owner					Total Households
Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
9,347	14,041	3,346	23,011	49,744	10,860	4,567	1,169	5,218	21,815	71,559
8,068	11,434	2,501	13,071	35,073	17,816	6,510	2,393	3,893	30,611	65,685
7,083	14,121	2,589	17,463	41,256	25,560	12,746	3,378	7,765	49,450	90,706
3,205	7,302	1,059	7,598	19,163	14,139	10,380	1,834	5,080	31,432	50,596
2,519	5,530	981	5,250	14,281	11,752	11,413	2,152	4,865	30,183	44,464
5,866	12,433	1,373	13,434	33,106	51,854	76,398	8,923	19,543	156,718	189,824

**Total Households**

**36,087    64,861    11,849    79,827    192,625    131,980    122,014    19,850    46,365    320,209    512,834**

**2035**

**Transit Demand Households in Market Area**

**Household by Type and Income**

Household Income <=30% MFI  
 Household Income >30 to <=50% MFI  
 Household Income >50 to <=80% MFI  
 Household Income >80% MFI to <=100% MFI  
 Household Income >100% MFI to <=120% MFI  
 Household Income >120% MFI

Renter					Owner					Total Households
Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
5,218	5,557	1,188	10,528	22,492	1,790	782	225	776	3,571	26,063
3,502	3,317	872	4,147	11,837	2,261	1,251	365	386	4,263	16,100
2,184	4,058	831	3,953	11,025	1,591	1,923	787	541	4,843	15,868
864	1,855	249	983	3,951	704	1,601	360	344	3,010	6,960
771	1,048	372	954	3,144	239	1,414	278	257	2,189	5,333
830	2,540	370	1,706	5,446	1,375	6,522	863	945	9,704	15,150

**Total Households**

**13,368    18,374    3,883    22,270    57,895    7,961    13,493    2,878    3,248    27,580    85,475**

**Transit Demand Households in Market Area**

*Housing Cost Burden > 30%*

**Household by Type and Income**

Household Income <=30% MFI  
 Household Income >30 to <=50% MFI  
 Household Income >50 to <=80% MFI  
 Household Income >80% MFI to <=100% MFI  
 Household Income >100% MFI to <=120% MFI  
 Household Income >120% MFI

Renter					Owner					Total Households
Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
3,586	4,708	1,010	8,511	17,815	1,313	605	146	607	2,671	20,485
3,123	2,722	650	3,491	9,986	1,211	627	280	214	2,332	12,318
1,183	1,338	255	1,344	4,121	374	990	321	216	1,900	6,022
465	284	16	144	910	144	652	109	51	956	1,865
445	-	42	-	487	-	246	74	51	372	859
283	-	-	-	283	164	516	55	67	803	1,085

**Total Households**

**9,085    9,053    1,974    13,490    33,601    3,205    3,636    986    1,206    9,033    42,634**

**Table C-8: Pima County and Market Area Households by Household Type and Income Level, 2040**

Total County Households	Renter					Owner					Total Households
	Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
<b>Household by Type and Income</b>											
Household Income <=30% MFI	9,200	14,297	3,837	22,646	49,980	12,213	5,697	1,539	6,055	25,504	75,484
Household Income >30 to <=50% MFI	8,074	11,585	2,716	12,621	34,997	20,998	7,854	2,938	4,766	36,556	71,553
Household Income >50 to <=80% MFI	7,194	14,837	2,868	16,680	41,579	29,925	15,302	4,150	8,438	57,814	99,393
Household Income >80% MFI to <=100% MFI	3,067	7,543	1,325	7,456	19,391	16,665	12,178	2,664	5,596	37,103	56,494
Household Income >100% MFI to <=120% MFI	2,604	5,662	998	5,315	14,579	14,409	12,913	2,790	5,463	35,575	50,154
Household Income >120% MFI	5,640	13,339	1,767	13,309	34,055	58,376	84,427	10,493	22,112	175,408	209,463

**Total Households** 35,779 67,263 13,511 78,028 194,580 152,586 138,371 24,574 52,429 367,960 562,541

**All Households in Market Area**

All Households in Market Area	Renter					Owner					Total Households
	Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
<b>Household by Type and Income</b>											
Household Income <=30% MFI	9,752	14,939	3,560	24,483	52,734	11,332	4,859	1,244	5,552	22,986	75,720
Household Income >30 to <=50% MFI	8,418	12,165	2,660	13,907	37,151	18,589	6,927	2,546	4,142	32,203	69,354
Household Income >50 to <=80% MFI	7,390	15,024	2,755	18,580	43,750	26,669	13,561	3,594	8,262	52,087	95,836
Household Income >80% MFI to <=100% MFI	3,344	7,769	1,126	8,084	20,323	14,752	11,044	1,952	5,405	33,152	53,475
Household Income >100% MFI to <=120% MFI	2,628	5,884	1,044	5,586	15,143	12,262	12,144	2,290	5,177	31,872	47,014
Household Income >120% MFI	6,120	13,228	1,461	14,294	35,103	54,103	81,285	9,494	20,794	165,676	200,779

**Total Households** 37,653 69,009 12,607 84,933 204,203 137,706 129,819 21,119 49,331 337,975 542,178

**Transit Demand Households in Market Area**

Transit Demand Households in Market Area	Renter					Owner					Total Households
	Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
<b>Household by Type and Income</b>											
Household Income <=30% MFI	5,445	5,912	1,264	11,202	23,823	1,867	831	239	825	3,763	27,586
Household Income >30 to <=50% MFI	3,654	3,529	928	4,412	12,522	2,360	1,331	388	411	4,489	17,012
Household Income >50 to <=80% MFI	2,279	4,317	884	4,206	11,686	1,660	2,046	838	576	5,120	16,805
Household Income >80% MFI to <=100% MFI	901	1,973	265	1,046	4,186	735	1,703	383	366	3,188	7,373
Household Income >100% MFI to <=120% MFI	804	1,115	396	1,015	3,329	250	1,505	296	273	2,324	5,653
Household Income >120% MFI	866	2,702	394	1,815	5,777	1,434	6,939	918	1,005	10,297	16,074

**Total Households** 13,948 19,549 4,131 23,694 61,323 8,306 14,356 3,062 3,456 29,180 90,503

**Transit Demand Households in Market Area  
Housing Cost Burden > 30%**

Transit Demand Households in Market Area Housing Cost Burden > 30%	Renter					Owner					Total Households
	Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
<b>Household by Type and Income</b>											
Household Income <=30% MFI	3,742	5,009	1,075	9,055	18,881	1,370	644	155	645	2,814	21,695
Household Income >30 to <=50% MFI	3,259	2,896	692	3,714	10,561	1,263	667	298	228	2,456	13,017
Household Income >50 to <=80% MFI	1,234	1,424	271	1,430	4,360	390	1,053	341	230	2,014	6,375
Household Income >80% MFI to <=100% MFI	485	303	17	154	958	150	693	116	54	1,014	1,972
Household Income >100% MFI to <=120% MFI	464	-	45	-	509	-	262	79	54	396	904
Household Income >120% MFI	295	-	-	-	295	171	549	59	71	851	1,146

**Total Households** 9,479 9,632 2,100 14,353 35,564 3,344 3,869 1,049 1,283 9,545 45,109



**Table C-9: Pima County and Market Area Households by Household Type and Income Level, 2045**

Total County Households	Renter					Owner					Total Households
	Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
<b>Household by Type and Income</b>											
Household Income <=30% MFI	9,409	15,108	4,054	23,931	52,502	12,490	6,020	1,627	6,398	26,535	79,037
Household Income >30 to <=50% MFI	8,257	12,242	2,870	13,337	36,707	21,474	8,299	3,105	5,036	37,915	74,621
Household Income >50 to <=80% MFI	7,357	15,678	3,031	17,626	43,692	30,603	16,170	4,385	8,916	60,075	103,767
Household Income >80% MFI to <=100% MFI	3,136	7,971	1,400	7,879	20,386	17,043	12,869	2,815	5,913	38,640	59,026
Household Income >100% MFI to <=120% MFI	2,663	5,983	1,055	5,616	15,317	14,736	13,645	2,948	5,773	37,102	52,419
Household Income >120% MFI	5,768	14,096	1,867	14,064	35,795	59,699	89,216	11,088	23,366	183,370	219,164
<b>Total Households</b>	<b>36,590</b>	<b>71,078</b>	<b>14,277</b>	<b>82,454</b>	<b>204,399</b>	<b>156,046</b>	<b>146,219</b>	<b>25,968</b>	<b>55,403</b>	<b>383,636</b>	<b>588,035</b>

All Households in Market Area	Renter					Owner					Total Households
	Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
<b>Household by Type and Income</b>											
Household Income <=30% MFI	10,051	15,904	3,790	26,064	55,809	11,678	5,173	1,325	5,911	24,086	79,896
Household Income >30 to <=50% MFI	8,676	12,951	2,832	14,806	39,265	19,158	7,374	2,710	4,410	33,651	72,916
Household Income >50 to <=80% MFI	7,617	15,995	2,933	19,780	46,325	27,485	14,438	3,827	8,796	54,545	100,870
Household Income >80% MFI to <=100% MFI	3,447	8,271	1,199	8,606	21,523	15,204	11,757	2,078	5,754	34,792	56,315
Household Income >100% MFI to <=120% MFI	2,709	6,264	1,111	5,947	16,032	12,637	12,928	2,438	5,511	33,514	49,545
Household Income >120% MFI	6,307	14,082	1,556	15,217	37,163	55,760	86,536	10,107	22,137	174,540	211,703
<b>Total Households</b>	<b>38,806</b>	<b>73,468</b>	<b>13,422</b>	<b>90,420</b>	<b>216,116</b>	<b>141,922</b>	<b>138,205</b>	<b>22,484</b>	<b>52,518</b>	<b>355,129</b>	<b>571,245</b>

Transit Demand Households in Market Area	Renter					Owner					Total Households
	Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
<b>Household by Type and Income</b>											
Household Income <=30% MFI	5,611	6,294	1,346	11,926	25,177	1,924	885	254	879	3,943	29,119
Household Income >30 to <=50% MFI	3,765	3,757	988	4,697	13,207	2,432	1,417	413	438	4,699	17,906
Household Income >50 to <=80% MFI	2,348	4,596	941	4,477	12,363	1,711	2,178	892	613	5,394	17,757
Household Income >80% MFI to <=100% MFI	929	2,101	282	1,113	4,425	757	1,813	408	390	3,369	7,794
Household Income >100% MFI to <=120% MFI	829	1,187	421	1,080	3,517	257	1,602	315	291	2,465	5,983
Household Income >120% MFI	892	2,877	419	1,932	6,121	1,478	7,387	978	1,070	10,913	17,034
<b>Total Households</b>	<b>14,375</b>	<b>20,812</b>	<b>4,398</b>	<b>25,225</b>	<b>64,811</b>	<b>8,560</b>	<b>15,283</b>	<b>3,260</b>	<b>3,680</b>	<b>30,783</b>	<b>95,594</b>

Transit Demand Households in Market Area <i>Housing Cost Burden &gt; 30%</i>	Renter					Owner					Total Households
	Elderly	Small Related	Large Related	All Other	Total Renters	Elderly	Small Related	Large Related	All Other	Total Owners	
<b>Household by Type and Income</b>											
Household Income <=30% MFI	3,856	5,333	1,144	9,640	19,973	1,412	685	165	687	2,950	22,923
Household Income >30 to <=50% MFI	3,358	3,083	737	3,954	11,132	1,302	710	317	243	2,572	13,704
Household Income >50 to <=80% MFI	1,272	1,516	289	1,523	4,600	402	1,121	363	244	2,131	6,731
Household Income >80% MFI to <=100% MFI	500	322	18	163	1,004	154	738	124	58	1,074	2,078
Household Income >100% MFI to <=120% MFI	478	-	48	-	526	-	279	84	58	421	947
Household Income >120% MFI	304	-	-	-	304	177	585	63	76	900	1,204
<b>Total Households</b>	<b>9,769</b>	<b>10,254</b>	<b>2,236</b>	<b>15,280</b>	<b>37,539</b>	<b>3,447</b>	<b>4,119</b>	<b>1,116</b>	<b>1,366</b>	<b>10,048</b>	<b>47,587</b>

**Table C-10: TOD Housing Demand by AMI Level, 2015 – 2045 – Renter Households**

	Income Level (Renter Households)						Total TOD Demand
	Extremely Low, Very Low, and Low Income			Moderate Income			
	below 30% AMI	30 to 50% AMI	50 to 80% AMI	80 to 100% AMI	100 to 120% AMI	above 120% AMI	
2015 (a)	17,044	8,801	8,439	3,006	2,373	4,224	43,886
2020 (b)	1,375	785	644	237	196	298	3,535
2025	1,425	816	666	246	203	307	3,662
2030	1,326	743	628	230	188	295	3,410
2035	1,322	693	649	232	185	322	3,402
2040	1,331	685	660	235	185	331	3,428
2045	1,354	685	677	240	188	344	3,488
<b>Total</b>	<b>25,177</b>	<b>13,207</b>	<b>12,363</b>	<b>4,425</b>	<b>3,517</b>	<b>6,121</b>	<b>64,811</b>
<i>% total</i>	<i>38.8%</i>	<i>20.4%</i>	<i>19.1%</i>	<i>6.8%</i>	<i>5.4%</i>	<i>9.4%</i>	

Notes:

(a) Figures for 2015 represent the existing pent-up demand based on 2008 - 2012 PUMS and adjusted according to State population

(b) Figures for 2020 and all subsequent years represent the additional TOD housing demand from new households for each five-year increment based on State population forecast

Sources: 2008-2012 American Community Survey (ACS) Public Use Microdata Sample (PUMS); Arizona Department of Administration, Office of Employment and Population Statistics, 2013; BAE, 2014.

**Table C-11: TOD Housing Demand by AMI Level, 2015 – 2045 – Owner Households**

	Income Level (Owner Households)						Total TOD Demand
	Extremely Low, Very Low, and Low Income			Moderate Income			
	below 30% AMI	30 to 50% AMI	50 to 80% AMI	80 to 100% AMI	100 to 120% AMI	above 120% AMI	
2015 (a)	2,491	2,945	3,565	2,279	1,719	7,550	20,549
2020 (b)	296	363	334	185	112	523	1,812
2025	311	382	348	191	115	538	1,884
2030	268	327	313	178	113	520	1,719
2035	206	246	283	177	130	573	1,615
2040	192	226	277	178	135	592	1,600
2045	180	210	274	181	142	616	1,603
<b>Total</b>	<b>3,943</b>	<b>4,699</b>	<b>5,394</b>	<b>3,369</b>	<b>2,465</b>	<b>10,913</b>	<b>30,783</b>
<i>% total</i>	<i>12.8%</i>	<i>15.3%</i>	<i>17.5%</i>	<i>10.9%</i>	<i>8.0%</i>	<i>35.5%</i>	

Notes:

(a) Figures for 2015 represent the existing pent-up demand based on 2008 - 2012 PUMS and adjusted according to State population forecast

(b) Figures for 2020 and all subsequent years represent the additions! TOD housing demand from new households for each five-year increment based on State population forecast

Sources: 2008-2012 American Community Survey (ACS) Public Use Microdata Sample (PUMS); Arizona Department of Administration, Office of Employment and Population Statistics, 2013; BAE, 2014.

**Table C-12: Table X: Arizona Low Income Housing Tax Credit Program - Allowable Rents, Pima County, 2013**

<b>Income Level</b>	<b>Allowable Monthly Rent</b>					
	<b>Studio</b>	<b>1 Bdrm</b>	<b>2 Bdrm</b>	<b>3 Bdrm</b>	<b>4 Bdrm</b>	<b>5 Bdrm</b>
80% AMI (a)	\$796	\$853	\$1,024	\$1,184	\$1,320	\$1,458
60% AMI	\$598	\$641	\$789	\$889	\$993	\$1,095
50% AMI	\$498	\$534	\$641	\$741	\$827	\$912
40% AMI	\$399	\$427	\$513	\$593	\$662	\$730
30% AMI	\$299	\$320	\$384	\$444	\$496	\$547
20% AMI	\$199	\$213	\$256	\$296	\$331	\$365

Notes:

(a) Because ADOH reported rent limits only up to the 60% AMI level, the 80% AMI rent limit presented is an estimate produced by BAE based on a comparison of published HUD and ADOH income levels and rent limits.

Sources: ADOH, 2013; HUD, 2013; BAE, 2014.

**Table C-13: Affordable and Market Rents, Pima County, 2014**

<b>Monthly Rent by Income Level (a)</b>					
	<b>Studio</b>	<b>1 Bdrm</b>	<b>2 Bdrm</b>	<b>3 Bdrm</b>	<b>4 Bdrm</b>
50 to 80% AMI	\$498 - \$796	\$534 - \$853	\$641 - \$1,024	\$741 - \$1,184	\$827 - \$1,320
30 to 50% AMI	\$299 - \$498	\$320 - \$534	\$384 - \$641	\$444 - \$741	\$496 - \$827
below 30% AMI	< \$299	< \$320	< \$384	< \$444	< \$496

<b>Market Data (b)</b>					
	<b>Studio</b>	<b>1 Bdrm</b>	<b>2 Bdrm</b>	<b>3 Bdrm</b>	<b>4 Bdrm</b>
Market rental rates	\$437	\$555	\$739	\$918	\$1,310
Share Mkt. Area units	4.9%	50.8%	37.4%	6.0%	0.9%

Notes:

(a) Represents the maximum rent deemed affordable to households in each income band, as defined by ADOH based on HUD rent limits. Because ADOH reported rent limits only up to the 60% AMI level, the 80% AMI rent limit presented is an estimate produced by BAE based on a comparison of published HUD and ADOH income levels and rent limits.

(b) Represents 4th quarter 2013 data from a sample of 43,000 rental units in Pima County, provided by RealFacts. Shaded cells indicate unit types for which the market rental rate is affordable to households at each income level.

Sources: ADOH, 2013; RealFacts, 2014; BAE, 2014.

**Table C-14: Arizona Low Income Housing Tax Credit  
Program - Imputed Incomes, Pima County, 2013**

<b>Income Level</b>	<b>Annual Household Income</b>			
	<b>1-person HH</b>	<b>2-person HH</b>	<b>3-person HH</b>	<b>4-person HH</b>
80% AMI (a)	\$31,870	\$36,447	\$41,023	\$45,600
60% AMI	\$23,940	\$27,360	\$30,780	\$34,200
50% AMI	\$19,950	\$22,800	\$25,650	\$28,500
40% AMI	\$15,960	\$18,240	\$20,520	\$22,800
30% AMI	\$11,970	\$13,680	\$15,390	\$17,100
20% AMI	\$7,980	\$9,120	\$10,260	\$11,400

Notes:

(a) Because ADOH reported income levels only up to the 60% AMI level, the 80% AMI income level presented is an estimate produced by BAE based on a comparison of published HUD and ADOH income levels.

Sources: ADOH, 2013; HUD, 2013; BAE, 2014.

**Table C-15: Affordable Housing Sale Price Calculator, Pima County, 2014**

	<b>Household Income (a)</b>	<b>Sale Price</b>	<b>Down Payment (b)</b>	<b>Total Mortgage (b)</b>	<b>Monthly Payment (b)</b>	<b>Monthly Property Tax (c)</b>	<b>Homeowner's Insurance (d)</b>	<b>Total Monthly PITI (e)</b>
<b>30% AMI</b>								
1 Person HH	\$11,970	\$50,112	\$10,022	\$40,090	\$222.37	\$59.34	\$17.54	\$299.25
2 Person HH	\$13,680	\$57,271	\$11,454	\$45,817	\$254.14	\$67.82	\$20.04	\$342.00
3 Person HH	\$15,390	\$64,430	\$12,886	\$51,544	\$285.90	\$76.30	\$22.55	\$384.75
4 Person HH	\$17,100	\$71,588	\$14,318	\$57,271	\$317.67	\$84.77	\$25.06	\$427.50
<b>50% AMI</b>								
1 Person HH	\$19,950	\$83,520	\$16,704	\$66,816	\$370.62	\$98.90	\$29.23	\$498.75
2 Person HH	\$22,800	\$95,451	\$19,090	\$76,361	\$423.56	\$113.03	\$33.41	\$570.00
3 Person HH	\$25,650	\$107,383	\$21,477	\$85,906	\$476.51	\$127.16	\$37.58	\$641.25
4 Person HH	\$28,500	\$119,314	\$23,863	\$95,451	\$529.45	\$141.29	\$41.76	\$712.50
<b>80% AMI (f)</b>								
1 Person HH	\$31,870	\$133,423	\$26,685	\$106,738	\$592.06	\$157.99	\$46.70	\$796.75
2 Person HH	\$36,447	\$152,583	\$30,517	\$122,066	\$677.08	\$180.68	\$53.40	\$911.17
3 Person HH	\$41,023	\$171,742	\$34,348	\$137,394	\$762.10	\$203.37	\$60.11	\$1,025.58
4 Person HH	\$45,600	\$190,902	\$38,180	\$152,722	\$847.12	\$226.06	\$66.82	\$1,140.00

Notes:

(a) Income limits published by Arizona Department of Housing (ADOH) based on HUD Income Limits, 2013.

(b) Mortgage terms:

Annual Interest Rate (fixed): 5.29% Freddie Mac historical monthly Primary Mortgage Market  
 Term of mortgage (years): 30  
 Percent of sale price as down payment: 20%

(c) Initial property tax (annual): 14.2% Annual rate applied to 1% of assessed value.

(d) Annual homeowner's insurance rate as % of sale price: 0.42% AZ Dept of Insurance 2014 Premium Comparison Guide, based on average of all quotes, assuming \$100,000 of coverage.

(e) PITI = Principal, Interest, Taxes, and Insurance

Percent of household income available for PITI: 30%

(f) Because ADOH reported income levels only up to the 60% AMI level, the 80% AMI income level presented is an estimate produced by BAE based on a comparison of published HUD and ADOH income levels.

Sources: ADOH, 2013; HUD, 2013; Freddie Mac, 2014; Pima County Board of Supervisors, 2014; AZ Dept. of Insurance, 2013; BAE, 2014.

**Table C-16: Affordable and Market Home Sale Prices, Eastern Pima County, 2014**

<b>Household Incomes by Percent of AMI (a)</b>				
	<b>1 Person HH</b>	<b>2 Person HH</b>	<b>3 Person HH</b>	<b>4 Person HH</b>
50 to 80% AMI	\$19,950 - \$31,870	\$22,800 - \$36,447	\$25,650 - \$41,023	\$28,500 - \$45,600
30 to 50% AMI	\$11,970 - \$19,950	\$13,680 - \$22,800	\$15,390 - \$25,650	\$17,100 - \$28,500
below 30% AMI	< \$11,970	< \$13,680	< \$15,390	< \$17,100

<b>Affordable Home Sale Price (b)</b>				
	<b>1 Person HH</b>	<b>2 Person HH</b>	<b>3 Person HH</b>	<b>4 Person HH</b>
50 to 80% AMI	\$83,520 - \$133,423	\$95,451 - \$152,583	\$107,383 - \$171,742	\$119,314 - \$190,902
30 to 50% AMI	\$50,112 - \$83,520	\$57,271 - \$95,451	\$64,430 - \$107,383	\$71,588 - \$119,314
below 30% AMI	< \$50,112	< \$57,271	< \$64,430	< \$71,588

<b>Share of Recent Sales by Household Price Range (c)</b>				
	<b>1 Person HH</b>	<b>2 Person HH</b>	<b>3 Person HH</b>	<b>4 Person HH</b>
50 to 80% AMI	25%	32%	37%	36%
30 to 50% AMI	8%	9%	10%	18%
below 30% AMI	5%	7%	10%	10%
<b>subtotal</b>	<b>38%</b>	<b>48%</b>	<b>57%</b>	<b>64%</b>

Notes:

(a) Represents annual income levels published by ADOH, based on HUD income limits. Because ADOH reported income limits only up to the 60% AMI level, the 80% AMI income limit was estimated by BAE based on a comparison of published HUD and ADOH income levels.

(b) Represents home price amount affordable to households at each income level assuming standard mortgage terms and prevailing interest rates, average homeowner's insurance premium as reported by Arizona Department of Insurance, and average property tax payment for urban Pima County based on data provided by the Pima County Board of Supervisors.

(c) Represents sales price distribution for 13,000 single family residential, townhouse, and condominium sales in Eastern Pima County based on Multiple Listing Service (MLS) data for 2013 reported by the Tucson Realtors Association.

Sources: ADOH, 2013; HUD, 2014; Arizona Department of Insurance, 2013; Pima County Board of Supervisors, 2014; Tucson Realtors Association MLS, 2014; BAE, 2014.



**Table C-17: New Housing Unit Production Trend, Eastern Pima County, For-Sale Units, 2004 - 2013**

	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
New Units Sold (a)	1,950	2,603	2,576	2,383	1,950	2,090	1,697	956	807	342
% change	n/a	33.5%	-1.0%	-7.5%	-18.2%	7.2%	-18.8%	-43.7%	-15.6%	-57.6%
<b>10-yr Avg.</b>	<b>1,735</b>	units per year								
<b>Avg. since 2010</b>	<b>951</b>	units per year								

Notes:

(a) New units refer to housing units built in the three years prior to the year of sale or in the year of sale.

Sources: DataQuick, 2014; BAE, 2014.

**Table C-18: Projected New Housing Unit Sales by Affordability**

<b>New Unit Sales</b>			
10-year annual average (a):	1,735		
30-year projected new unit sales:	52,062		
<b>New Unit Affordability</b>			
	<b>Extremely/Very Low- Income HHs (&lt; 50% AMI)</b>	<b>Low to Moderate Income HHs (50 - 80% AMI)</b>	<b>Total Below Moderate Income HHs (&lt; 80% AMI)</b>
Percent of Sales Affordable (b)	20.0%	37.0%	57.0%
Projected Affordable Sales, 30-yrs	10,412	19,263	29,675
<b>New Unit Affordability</b>			
	<b>Extremely/Very Low- Income HHs (&lt; 50% AMI)</b>	<b>Low to Moderate Income HHs (50 - 80% AMI)</b>	<b>Total Below Moderate Income HHs (&lt; 80% AMI)</b>
30-yr TOD Demand (Households) (c)	8,642	5,394	14,036
TOD Demand as % of Aff. Sales	83.0%	28.0%	47.3%

Notes:

(a) Represents the 10-year annual average number of new unit sales from 2003 to 2013 that were built in the three years prior to the year of sale or in the year of sale, according to Assessors data provided by DataQuick.

(b) Represents the percent of recent home sales in Eastern Pima County that closed at a price affordable to a 3-person household, according to MLS sales data and ADOH income limits as presented in Table 12 of this report.

(c) Projected TOD demand based on PUMS dataset, as presented in Table 11 of this report.

Sources: DataQuick, 2014; BAE, 2014.

# APPENDIX D: OPPORTUNITY SITES PRIORITIZATION TABLES

**Table D-1: TOD Housing Development Priority for Proposed HCT Station Areas**

<u>Station</u>	<u>Location</u>	<u>City</u>	<u>Rank</u>	<u>Priority</u>
T-5	Speedway & Campbell	Tucson	6	Near-term
T-4	Ronstadt Transit Center	Tucson	6	Near-term
ST-1	29th & 6th Ave	South Tucson	7	Near-term
ST-2	39th & 6th Ave	South Tucson	7	Near-term
T-3	Mercado Streetcar Stop	Tucson	7	Near-term
T-7	RR & I-10	Tucson	8	Near-term
T-6	Laos Transit Center	Tucson	8	Near-term
M-5	Ina & I-10	Marana	9	Mid-term
M-4	Cortaro & I-10	Marana	9	Mid-term
M-2	Tangerine & I-10	Marana	9	Mid-term
M-3	Twin Peaks & I-10	Marana	10	Mid-term
M-1	Marana Rd & I-10	Marana	10	Mid-term
T-2	Wetmore & Stone	Tucson	10	Mid-term
OV-5	Magee & Oracle	Oro Valley	11	Mid-term
T-1	Wetmore & Oracle	Tucson	11	Mid-term
S-3	Pima Mine & Nogales Hwy	Sahaurita	12	Long-term
S-2	Sahuarita Rd & Wilmot	Sahaurita	12	Long-term
OV-1	La Cholla & Tangerine	Oro Valley	12	Long-term
OV-3	Tangerine & Oracle	Oro Valley	13	Long-term
OV-4	1st & Oracle	Oro Valley	13	Long-term
S-1	Sahuarita Rd & Nogales Hwy	Sahaurita	14	Long-term
OV-6	Innovation & Tangerine	Oro Valley	14	Long-term
S-4	Duval Mine & I-10	Sahaurita	15	Long-term
OV-2	Rancho Vistoso & Oracle	Oro Valley	15	Long-term

Sources: ESRI; American Community Survey; 2010 Decennial Census; PAG Travel Reduction Program; Drachman Institute; BAE.

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**Table D-2: Ranking by Housing Cost Burden**

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<b>TOD Code</b>	<b>Location</b>	<b>City</b>	<b>% of HH with High Housing Cost Burden</b>	<b>Rank</b>
T-6	Laos Transit Center	Tucson	50.4%	1
ST-2	39th & 6th Ave	South Tucson	49.6%	1
T-7	RR & I-10	Tucson	46.0%	1
ST-1	29th & 6th Ave	South Tucson	45.1%	1
T-5	Speedway & Campbell	Tucson	44.7%	1
T-4	Ronstadt Transit Center	Tucson	44.0%	1
T-3	Mercado Streetcar Stop	Tucson	41.9%	1
T-2	Wetmore & Stone	Tucson	40.1%	1
S-3	Pima Mine & Nogales Hwy	Sahuarita	38.4%	2
T-1	Wetmore & Oracle	Tucson	34.9%	2
M-5	Ina & I-10	Marana	33.8%	2
M-1	Marana Rd & I-10	Marana	33.1%	2
M-4	Cortaro & I-10	Marana	32.2%	2
M-2	Tangerine & I-10	Marana	30.6%	2
OV-1	La Cholla & Tangerine	Oro Valley	30.2%	2
S-2	Sahuarita Rd & Wilmot	Sahuarita	29.3%	2
S-1	Sahuarita Rd & Nogales Hwy	Sahuarita	28.3%	3
OV-5	Magee & Oracle	Oro Valley	27.2%	3
OV-4	1st & Oracle	Oro Valley	27.2%	3
M-3	Twin Peaks & I-10	Marana	26.8%	3
OV-3	Tangerine & Oracle	Oro Valley	26.3%	3
OV-2	Rancho Vistoso & Oracle	Oro Valley	26.1%	3
OV-6	Innovation & Tangerine	Oro Valley	19.7%	3
S-4	Duval Mine & I-10	Sahuarita	19.2%	3

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Note: High housing cost burden is defined as spending 30% or more of income on housing costs.

Sources: American Community Survey 2008-2012; 5-year data Drachman Institute; BAE.

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**Table D-3: Ranking by Rental Vacancy Rate**

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<b>TOD Code</b>	<b>Location</b>	<b>City</b>	<b>Rental Vacancy Rate</b>	<b>Rank</b>
M-3	Twin Peaks & I-10	Marana	4.6%	1
M-4	Cortaro & I-10	Marana	4.9%	1
OV-5	Magee & Oracle	Oro Valley	5.3%	1
T-5	Speedway & Campbell	Tucson	5.7%	1
M-5	Ina & I-10	Marana	6.9%	1
T-3	Mercado Streetcar Stop	Tucson	7.7%	1
OV-1	La Cholla & Tangerine	Oro Valley	7.9%	1
S-2	Sahuarita Rd & Wilmot	Sahuarita	8.0%	1
M-2	Tangerine & I-10	Marana	8.4%	2
T-4	Ronstadt Transit Center	Tucson	9.0%	2
OV-6	Innovation & Tangerine	Oro Valley	9.6%	2
M-1	Marana Rd & I-10	Marana	9.6%	2
S-1	Sahuarita Rd & Nogales Hwy	Sahuarita	9.7%	2
ST-1	29th & 6th Ave	South Tucson	9.7%	2
S-3	Pima Mine & Nogales Hwy	Sahuarita	10.1%	2
OV-4	1st & Oracle	Oro Valley	10.2%	2
T-7	RR & I-10	Tucson	10.7%	3
S-4	Duval Mine & I-10	Sahuarita	10.8%	3
T-6	Laos Transit Center	Tucson	10.9%	3
T-2	Wetmore & Stone	Tucson	11.0%	3
T-1	Wetmore & Oracle	Tucson	11.5%	3
ST-2	39th & 6th Ave	South Tucson	11.6%	3
OV-2	Rancho Vistoso & Oracle	Oro Valley	13.8%	3
OV-3	Tangerine & Oracle	Oro Valley	14.7%	3

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Sources: 2010 Decennial Census; BAE.

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**Table D-4: Ranking by Job Accessibility**

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<b>TOD Code</b>	<b>Location</b>	<b>City</b>	<b>Number of Accessible Jobs</b>	<b>Rank</b>
T-4	Ronstadt Transit Center	Tucson	64,309	1
ST-2	39th & 6th Ave	South Tucson	49,482	1
T-5	Speedway & Campbell	Tucson	41,706	1
ST-1	29th & 6th Ave	South Tucson	39,678	1
T-6	Laos Transit Center	Tucson	39,678	1
T-3	Mercado Streetcar Stop	Tucson	39,678	1
T-2	Wetmore & Stone	Tucson	39,678	1
T-7	RR & I-10	Tucson	38,059	1
S-3	Pima Mine & Nogales Hwy	Sahuarita	32,266	2
M-2	Tangerine & I-10	Marana	29,465	2
M-5	Ina & I-10	Marana	28,322	2
M-4	Cortaro & I-10	Marana	28,322	2
M-3	Twin Peaks & I-10	Marana	28,322	2
M-1	Marana Rd & I-10	Marana	28,322	2
OV-3	Tangerine & Oracle	Oro Valley	21,434	2
OV-4	1st & Oracle	Oro Valley	20,511	2
OV-5	Magee & Oracle	Oro Valley	20,511	2
T-1	Wetmore & Oracle	Tucson	20,511	2
OV-1	La Cholla & Tangerine	Oro Valley	1,143	3
OV-6	Innovation & Tangerine	Oro Valley	1,143	3
S-1	Sahuarita Rd & Nogales Hwy	Sahuarita	0	3
S-2	Sahuarita Rd & Wilmot	Sahuarita	0	3
S-4	Duval Mine & I-10	Sahuarita	0	3
OV-2	Rancho Vistoso & Oracle	Oro Valley	0	3

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Sources: PIMA Association of Governments Travel Reduction Program; BAE.

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**Table D-5: Ranking by Number of High Capacity Transit Lines**

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<u>TOD Code</u>	<u>Location</u>	<u>City</u>	<u>Number of HCT Lines</u>	<u>Rank</u>
T-4	Ronstadt Transit Center	Tucson	5	1
ST-2	39th & 6th Ave	South Tucson	3	1
M-2	Tangerine & I-10	Marana	3	1
T-5	Speedway & Campbell	Tucson	2	2
ST-1	29th & 6th Ave	South Tucson	2	2
T-7	RR & I-10	Tucson	2	2
T-6	Laos Transit Center	Tucson	2	2
M-5	Ina & I-10	Marana	2	2
M-4	Cortaro & I-10	Marana	2	2
M-3	Twin Peaks & I-10	Marana	2	2
M-1	Marana Rd & I-10	Marana	2	2
OV-3	Tangerine & Oracle	Oro Valley	2	2
S-3	Pima Mine & Nogales Hwy	Sahuarita	1	3
S-1	Sahuarita Rd & Nogales Hwy	Sahuarita	1	3
T-3	Mercado Streetcar Stop	Tucson	1	3
OV-1	La Cholla & Tangerine	Oro Valley	1	3
OV-6	Innovation & Tangerine	Oro Valley	1	3
OV-4	1st & Oracle	Oro Valley	1	3
OV-5	Magee & Oracle	Oro Valley	1	3
T-1	Wetmore & Oracle	Tucson	1	3
T-2	Wetmore & Stone	Tucson	1	3
S-2	Sahuarita Rd & Wilmot	Sahuarita	0	3
S-4	Duval Mine & I-10	Sahuarita	0	3
OV-2	Rancho Vistoso & Oracle	Oro Valey	0	3

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Source: BAE.

**Table D-6: Ranking by Percent of Workers Commuting by Bus**

<b>TOD Code</b>	<b>Location</b>	<b>City</b>	<b>Percent Commuting by Bus</b>	<b>Rank</b>
ST-2	39th & 6th Ave	South Tucson	13.4%	1
ST-1	29th & 6th Ave	South Tucson	11.3%	1
T-7	RR & I-10	Tucson	11.2%	1
T-3	Mercado Streetcar Stop	Tucson	8.2%	1
T-4	Ronstadt Transit Center	Tucson	8.2%	1
T-1	Wetmore & Oracle	Tucson	6.7%	1
T-5	Speedway & Campbell	Tucson	5.5%	1
T-6	Laos Transit Center	Tucson	5.5%	1
T-2	Wetmore & Stone	Tucson	5.0%	2
M-2	Tangerine & I-10	Marana	4.4%	2
M-1	Marana Rd & I-10	Marana	2.3%	2
M-5	Ina & I-10	Marana	1.6%	2
OV-5	Magee & Oracle	Oro Valley	1.2%	2
M-4	Cortaro & I-10	Marana	0.5%	2
M-3	Twin Peaks & I-10	Marana	0.5%	2
S-3	Pima Mine & Nogales Hwy	Sahuarita	0.0%	3
S-1	Sahuarita Rd & Nogales Hwy	Sahuarita	0.0%	3
S-2	Sahuarita Rd & Wilmot	Sahuarita	0.0%	3
S-4	Duval Mine & I-10	Sahuarita	0.0%	3
OV-1	La Cholla & Tangerine	Oro Valley	0.0%	3
OV-6	Innovation & Tangerine	Oro Valley	0.0%	3
OV-3	Tangerine & Oracle	Oro Valley	0.0%	3
OV-2	Rancho Vistoso & Oracle	Oro Valley	0.0%	3
OV-4	1st & Oracle	Oro Valley	0.0%	3

Source: ESRI, based on 2005-2009 5-year American Community Survey; BAE.