

# BRENHAM

## CDS RESINTEL HOUSING STUDY 2021



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Prepared for:

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August 2021

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## GLOSSARY OF TERMS

PCensus	PCensus from Claritas provides detailed United States Census data to a very detailed level of geography and uses Census data to forecast and project current and future demographic trends.
QCEW	The Quarterly Census of Employment and Wages (QCEW) program publishes a quarterly count of employment and wages reported by employers covering more than 95 percent of U.S. jobs, available at the county, MSA, state and national levels by industry.
ACS	The American Community Survey (ACS) is a nationwide survey designed to provide communities with reliable and timely social, economic, housing, and demographic data every year from the U.S. Census Bureau.
Housing Cost Burden	Housing cost burden is a method to analyse the ratio of a household's gross monthly housing costs to the household's gross monthly income. For example, if a household pays \$1,000 in rent and receives \$4,000 in income per month, its housing cost to income ratio is $\$1,000 / \$4,000$ , or the household pays 25% of their income toward housing costs. Housing cost burden, as defined by HUD, is if a household's housing cost to income ratio (HCIR) is greater than 30% (that is, if the household pays more than 30% of their income toward housing) then that household is housing cost burdened. If their HCIR is greater than 50% then the household is severely housing cost burdened. While these thresholds are essentially arbitrary, they can be somewhat useful for understanding poverty and housing outcomes.
Restricted	A rental unit that is restricted on the age, income or rent for a particular tenant of that rental unit.
Non-market rate	A rental unit that is not available for rent for particular individuals who do not meet age, income or rent requirements.
Market rate	A rental unit that is typically available to any qualified tenant making at least three times the monthly rent.
MLS	A Multiple Listing Service (MLS) is a database established by cooperating real estate brokers to provide data about properties for sale. An MLS allows brokers to see one another's listings of properties for sale with the goal of connecting homebuyers to sellers. Under this arrangement, both the listing and selling broker benefit by consolidating and sharing information, and by sharing commissions.
Hispanic	Americans who identify themselves as being of Spanish-speaking background and trace their origin or descent from Mexico, Puerto Rico, Cuba, Central and South America, and other Spanish-speaking countries. This includes 20 Spanish-speaking nations from Latin America and Spain itself.
Latino	Americans who identify themselves as being of Latin American background from countries where Spanish is not the official language like Brazil.
Household	A domestic unit consisting of the members of a family who live together along with nonrelatives such as servants.
Family Household	A family household is a household maintained by a householder who is in a family and includes any unrelated people (unrelated subfamily members and/or secondary individuals) who may be residing there. The number of family households is equal to the number of families. The count of family household members differs from the count of family members, however, in that the family household members include all

	people living in the household, whereas family members include only the householder and his/her relatives.
Nonfamily Household	A non-family household is one or more people living in a private dwelling who are not "related" persons. For example, two college students who rent an apartment off-campus are a non-family household. A single person living in a house is also a non-family household.
Householder	A person who occupies a house or tenement alone or as the head of a household.
At poverty	Each year, the U.S. Census Bureau counts people in poverty with two measures. Both the official and supplemental poverty measures are based on estimates of the level of income needed to cover basic needs. Those who live in households with earnings below those incomes are considered to be in poverty.
Below poverty	The Census Bureau also provides data using ratios that compare the income levels of people or families with their poverty threshold: A household income above 100% of their poverty threshold is considered "above the poverty level." Income above 100% but below 125% of poverty is considered "near poverty." Households with incomes at or below 100% are considered "in poverty." Household incomes below 50% of their poverty threshold are considered to be in "severe" or "deep poverty."
NAICS	The North American Industry Classification System (NAICS) is the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy.
LEHD	The Longitudinal Employer-Household Dynamics (LEHD) program is part of the Center for Economic Studies at the U.S. Census Bureau. The LEHD program produces new, cost effective, public-use information combining federal, state and Census Bureau data on employers and employees under the Local Employment Dynamics (LED) Partnership. The LED Partnership works to fill critical data gaps and provide indicators needed by state and local authorities. Under the LED Partnership, states agree to share Unemployment Insurance earnings data and the Quarterly Census of Employment and Wages (QCEW) data with the Census Bureau. The LEHD program combines these administrative data, additional administrative data and data from censuses and surveys. From these data, the program creates statistics on employment, earnings, and job flows at detailed levels of geography and industry and for different demographic groups. In addition, the LEHD program uses these data to create partially synthetic data on workers' residential patterns.
CoStar	CoStar, the world leader in commercial real estate information, the most comprehensive database of real estate data throughout the US, Canada, UK and France.
Days on market	The National Association of Realtors defines DOM as the number of days from the date on which a property is listed for sale on the local brokers' multiple-listing services (MLS) to the date when the seller has signed a contract for the sale of the property.
FHA	Federal Housing Administration (FHA) provides mortgage insurance on loans made by FHA-approved lenders nationwide. As part of the U.S. Department of Housing and Urban Development (HUD), FHA insure mortgages on single family homes, multifamily properties, residential care facilities, and hospitals.



Single-family	A structure maintained and used as a single dwelling unit.
Multifamily	A multifamily building or home has multiple units owned by one or more parties. Condo buildings and duplexes can be considered multifamily residences, but with a duplex, both the property and the land are recorded on one deed.
LIHTC	The Low-Income Housing Tax Credit (LIHTC) subsidizes the acquisition, construction, and rehabilitation of affordable rental housing for low- and moderate-income tenants. The federal government issues tax credits to state and territorial governments. State housing agencies then award the credits to private developers of affordable rental housing projects through a competitive process. Developers generally sell the credits to private investors to obtain funding. Once the housing project is placed in service (essentially, made available to tenants), investors can claim the LIHTC over a 10-year period.
Age Restricted	Rental housing units restricted by the age of tenant, typically for residents aged 55 and older.
Income Restricted	Rental housing units restricted by the income of tenant, typically units are reserved for a percentage of the area median family income.
Rent Restricted	Rental housing units restricted by the maximum monthly rental amount asked for a unit.
ADU	An accessory dwelling unit (ADU) is a smaller, independent residential dwelling unit located on the same lot as a stand-alone (i.e., detached) single-family home or other eligible property.
AMI	The area median income (AMI) is the household or family income for the median — or middle — household or family in a region.

## INTRODUCTION

The Brenham | Washington County Economic Development Organization (BWEDO) is a partnership between the City of Brenham and Washington County. The goal of the organization is to promote economic development throughout the entire community. Collaboration with community partners including Brenham Community Development Corporation (a Type B EDC), Brenham Economic Development Foundation, Blinn College, and Washington County Chamber of Commerce creates a pro-business environment that supports existing employers, attracts investment through recruitment of new employers, and explores ways to strengthen the local workforce.

## CDS Company Bio

CDS Community Development Strategies (CDS) is a leading national consulting firm headquartered in Houston, Texas, providing economic analysis, public planning, and market research services to clients in a wide variety of industries. CDS was formed in 1971 and is staffed with seasoned professionals who have training and experience in economic development, demographic research, urban planning, statistical analysis, market evaluation, and all aspects of real estate development.

Since 1971, CDS has remained at the forefront of the industry by doing three things:

1. Staying actively involved in numerous professional and trade associations.
2. Providing clear, unbiased, and up-to-date solutions by employing the most appropriate and cost-effective research methods.
3. Utilizing solution-oriented analysis teams to focus on each project assignment adapted to your needs.



## The Purpose of this Study

This study contains the most recent research, analysis, and findings for improvement related to the housing market in Brenham. The focus of this study centers on the following:

- A comprehensive assessment of current and future demand and market potential for housing (with an emphasis on attainable workforce products) that will best serve the resident population
- An analysis of the supply of housing available
- An assessment of demand / supply mismatches and recommendations for mitigating them
- The magnitude and nature of demand for all types of housing deemed to be needed in Brenham
- Survey of local workers to identify any changes in housing needs
- Conclude the potential opportunities to fulfill current and future needs

This study required a considerable amount of participation from Brenham stakeholders, employers, real estate professionals, and government staff, for which CDS is grateful.

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## SUMMARY

### Demographic and Economic Analysis

#### Population and Households

- Population and households in the City and County over the past 10 years has experienced an increase of net 1,176 and 2,572 residents, respectively. Positive indicators such as recent job growth and public investments has taken place the past several years.
- The City and County have experienced moderate population growth from 2010 through 2021 at an average annual rate of 106 and 233 per year, respectively.
- In the past 11 years Brenham's growth represented a 46% share of the total population growth of the County, showing that almost half of the entire County's new population growth occurred in the City.
- Current forecasted population growth in Brenham and Washington County shows another 650 and 1,872 persons respectively through 2026.
- At the moment Brenham population represents a 47% share of the estimated current total population residing in Washington County and a 44% share of the County's households.
- Currently the median age in Brenham is 37.09 and the County is 41.82.
- Age 15 to 17 cohort had the least share of population at 4% (624).
- Age 65 and Over represented 20% (3,434) of the population.
- Those in Brenham who identified as Hispanic, or Latino represented 17% of the total population.
- The estimated average household size for Brenham was 2.33.
- Family households were the predominate household type of both areas accounting for 63% and 68% of households in the City and County, respectively.
- In Brenham family households were 37% and in Washington County family households were 32%.
- The most prevalent household sizes in Brenham were:
  - 1-person households with a 34% share of total households at 2,111 households.
  - 2-person households with a 33% share of total households at 2,044 households.
  - 3-person households dropped to a 14% share of total households at 898.
- Approximately 69% of households in Brenham (4,328) had no children younger than 18 years old in their household.
- There were 6,251 total households in Brenham with 63% (3,920) family households.
- Families at or above poverty were approximately 86% (3,360) of all families in Brenham.
- In Brenham there was an estimated 15% (915) of all households that were family households below poverty, 6% (358) were family households below poverty with children.

- The educational attainment of the populace over age 25 shows about 15% in Brenham had less than a high school education.
- The most current enrollment count for Brenham ISD was 5,338 and 476 for Burton ISD.
- Enrollment has increased by about 130 net new students since 2013.
- Median household income in Brenham for 2021 was estimated to be \$53,075, slightly lower than Washington County.
- Approximately 48% (2,996) of households in the City had a household income less than \$50,000.
- The greatest household income cohorts in Brenham were \$50,000 to \$74,999 with 1,053 (17%), followed by \$55,000 to \$99,999 with 847 (14%), and \$25,000 to \$34,999 with 790 (11%).
- Estimated projections for 2026 show Brenham gaining a net 320 households.

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## Income, Wages and Employment

- Income and wage data referenced throughout this study are based on county wage and local employer information and does not consider aggregate sources of household income like retirement, social security and investments in order to best analyze and understand housing needs primarily for the locally employed workforce.
- Estimates indicate around 12,000 employees working at the largest businesses located in Brenham. In the past five years at least 300 new jobs were created in Brenham.
- Local employers generally stated that they had excess demand and the need to hire additional employees and several even stated they could expand their existing business. However, almost all businesses said they experience difficulty hiring and retaining some workers due to a lack of new market rate apartments and new entry level single-family homes.
- In Brenham 56% (3,805) of employed residents were employed in White Collar occupations, 26% (1,727) in Blue Collar and 18% (1,248) in Service and Farm.
- Office/Admin. Support (11%), Sales/Related (11%) and Production (10%). These occupations accounted for 31% of the 6,780 employed residents in Brenham
- Unemployment for Washington County rose to 3.8% from 3.1% (2018) overall in 2021 while the U.S. and Texas was 3.3%. This is the first time since 2010 that unemployment in the County exceeded the US and Texas but was still under 4%. Even during the worst economic conditions for the oil business from 2015 through 2017, unemployment in Washington County did not exceed the U.S. and Texas rates.
- The five largest industry sectors by employment in Washington County are:
  - Health Care and Social Assistance (18%), Manufacturing (18%), Retail Trade (13%), Educational Services (9%), and Accommodation and Food Services (9%).
- Combined, these five industries employ 10,014 workers which account for 67% of all jobs in the County.
- The 2020 average weekly wage for the County was \$963.
- Since 2018 the net largest numbers of employees were added in:
  - Wholesale Trade (267), Accommodation and Food Services (192) and Finance and Insurance (138).
- Among the top employment industries, the most impressive growth rates were found in:
  - Wholesale Trade (34%), Management of Companies (25%), and Finance and Insurance (20%).
- The dominant employment sector is Health Care and Social Assistance at 18% of all wage earners followed by Manufacturing with 18% as well.
- Retail Trade, Educational Services and Accommodation and Food Services are the other core sectors of the employment in the County.

- Nine of the twenty-one industry sectors in Washington County pay an average weekly wage more than \$1,000 per week and the average weekly wage for all industries combined in the County was \$963. This accounts for 6,288 jobs (42%) of all employed (15,059) in the County.
- In Texas the 2Q 2020 average weekly wage was \$841.
- Manufacturing wages have by far the largest impact on the economy amounting to 22% of all wages and nearly \$39 million in total wages. Health Care and Social Assistance is the next highest impact with 14.4% of all wages.
- Retail Trade were also among the top sectors with the highest overall economic impact, yet this is due to their very large employment, yet low paying wages.
- Average weekly wages have had a continuous growth in the County each year from 2011 to 2020.
- Over a ten-year period, this could result in an overall average weekly wage increase of \$1,239 equivalent to the 26% overall growth seen from 2011-2020.
- Those working in sectors with the largest amounts of employees making at and below the average weekly county wage are in greatest need of additional housing priced no more than 30% of their income.
- These sectors include:
  - Health Care and Social Assistance
  - Retail Trade
  - Educational Services
  - Accommodation and Food Services,
  - Administrative and Support and Waste Management and Remediation Services
- According to 2018 LEHD Census data there were 12,689 workers employed within the city limits and of that total 76% (9,636) resided outside of the City.
- Almost half of those working in Brenham, 5,856 (46%), live 25 or more miles from their place of work in Brenham.
- Approximately, 33% live greater than 50 miles from Brenham.
- In 2021 data from QCEW for Washington County demonstrated 15,059 workers, 996 establishments, and \$963 average weekly wage.
- Using this data Brenham would possess an 80% share of all employment in the County.
- The largest employers, as well as a growing small business community, in Brenham provide a stable and resilient employment base with a 2021 median household income of \$53,075 based on PCensus 2021 and \$45,197 according to 2019 ACS data.
- Unemployment in Washington County as of 2020 was 5.6%. Unemployment in the County was at its lowest 10 year point in 2018 at 3.4%. Average employment increased by 3% from 2011 to 2021, a total increase of 414 jobs.

- As previously demonstrated, 2018 data from LEHD showed 76% (9,636) of 12,000 Brenham workers resided outside of the City which was a high rate.
- Many interviews with employers in the City shared that workers of all pay grades in many instances have secured housing outside of Brenham in areas previously mentioned.
- This was mostly the result of the lack of new market rate apartment unit creation and limited supply and quality of existing market rate housing in the City.
- The key is to lure local worker households to Brenham with more and newer housing offerings and less driving for the commute.
- The City of Brenham has local employers that appear to be primed for local expansion. But, without new market rate apartment units as well as more single-family for-sale and rental options Brenham businesses cannot hire as many new employees as they need in the time and ease that allows them to continue to grow in step with increased local and outside demand for their products and services.

Income Type	Income	Rent	For-Sale
2021 PCensus Median Household Income	\$53,075	\$1,327	\$168,000
2Q2020 QCEW Washington County Avg. Weekly Wage	\$50,076 / \$963	\$1,250	\$158,000
2019 ACS Brenham Med. HH Income	\$45,197	\$1,130	\$140,500
2019 ACS Owner Median Income	\$60,347	\$1,500	\$194,000
2019 ACS Renter Median Income	\$23,750	\$600	\$65,500

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## Housing Market Trends

- The City of Brenham has local employers that appear to be primed for local expansion. But, without new market rate apartment units as well as more single-family for-sale and rental options Brenham businesses cannot hire as many new employees as they need in the time and ease that allows them to continue to grow in step with increased local and outside demand for their products and services
- In Brenham 59% of occupied housing units were estimated to be owner-occupied (3,710 units) with the remaining 41% (2,541 units) renters. About half of the County's households were located in Brenham.
- Approximately 74% (5,086) of Brenham's housing units were single-family detached.
- Duplex, triplex and four-plex units accounted for 9% (629) of all housing units in the City, while mobile homes accounted for 3.6% (250) and attached single-family accounted for 2% (125).
- Small scale multi-family apartments (5 to 19 units) appear to play a marginal role in the rental housing market in Brenham, making up just over 4% (250) of all housing units in the City.
- An estimated 6,886 housing units are located in Brenham, representing about a 41% share of the 16,616 housing units in the County. This places Brenham as the prime housing location for the County.
- Both Study Areas feature existing home stocks predominately built from 1970 to 1999.
- Existing older homes that can be maintained and revitalized will create a positive impact to providing adequate housing to the community.
- Approximately 77% of Brenham housing units were built before 2000.
- An estimated 1,207 (33%) owner-occupied homes in Brenham were valued below \$150,000.
- The median value of owner-occupied homes in Brenham was \$195,442. This information is provided by the home owner, not actual sales or appraisal data, and can be subject to owner perceptions.
- According to 2019 ACS data Brenham's median household income was \$45,197 and Washington County was \$54,971.
- In Brenham owner occupied median household income was \$60,347 and renter occupied median household income was \$23,750.
- Approximately 35% of all Brenham households were 65 and older.
- There was an estimated 1,798 total households experiencing housing cost burden in 2019 in Brenham. Of those, 1,114 were renters and 684 were owners.
- In Brenham 2,897 (50%) of all households earned less than \$50,000 annually. This was made up by 1,450 owners and 1,447 renters who made less than \$50,000. Furthermore, 684 (19%) of owner households made \$50,000 or less and were housing cost burdened and 894 (50%) of renter households made \$50,000 or less and were housing cost burdened.



- In total 1,875 (32%) of all households in Brenham were housing cost burdened. There were 761 owner households that were housing cost burdened (13% of all households, 21% of all owner households) and 1,114 renter households that were housing cost burdened (19% of all households, 50% of all renter households).
- Out of 3,553 owner households in Brenham 46% (1,623) had a mortgage and 54% (1,930) were without a mortgage.

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## Multifamily

- Several sources provide estimates for multifamily apartment units in Brenham that vary.
  - PCensus 2021 – 794 apartment units
  - CoStar 2021 – 916 apartment units
  - ACS 2019 – 848 apartments units
  - CDS 2021 – 1,023 apartment units
- It should be noted that the multifamily apartment figures above include only units located in properties containing between 5 to 50 or more units. Total renter households in Brenham were estimated by PCensus to be 2,541.
- According to data from CoStar the 2021 multifamily average rental unit rate in Brenham was \$750 per month at the time of this study. Apartment managers stated that rents had not risen greatly over the past several years.
- Over the past 5 years average unit rent price went from \$686 in 2016 to \$750 at the time of this study, an increase of \$65 per month in that span.
- Highest average priced market rate units were in the \$1,000 to \$870 range and lowest average priced market rate units were \$725 to \$655. Occupancy in all unit types were high at an average of 95%.
- Occupancy the past 5 years in Brenham has been an average of 95%, a healthy sign for the market. Brenham’s 95% occupancy rate of existing multifamily apartment units shows a healthy level of occupancy and falls within the commonly accepted industry average vacancy of 93%-94%. This indicates that demand for multifamily apartment rental units in Brenham is high and supply is low
- Stone Hollow (112 units) and Olde Oaks (59) were the two market rate complexes with the greatest amount of units. Stone Hollow was built in 1983 but units have been updated as recently as 2021 and had an average unit rent of \$867.
- The newest non market rate complexes was the 2016 built Belle Towers and the 2018 built Parklane Villas.
- Reserve on Sabine was the most recent market rate units built in Brenham in 2018 but only has 16 units.
- Planned multifamily apartment complexes in Brenham at the time of this report was an 80 unit non-market rate (income restricted) complex called Fairview Terrace and the 45 unit non market rate (age and income restricted) Trinity complex.
- Market rate 1 bed units were an average of about \$700 per month, 2 bed units at an average of \$880 per month, and 3 bed units at an average of \$946 per month.
- The average market rate multifamily apartment unit rent in areas where Brenham workers live such as Cypress and College Station was about \$1,150.

- BrenSha Heights apartments currently represents what might be considered sufficient for new exterior and interior finishes for a market rate apartment complex in Brenham.
- The pool and landscaping at BrenSha Heights and Cortin Village are examples of basic outdoor amenities for a new market rate apartment complex in Brenham.
- CDS believes there is demand for a supply of at least 50-100 new restricted, non market apartment rental units with maximum rents of \$500 to \$875 per month in Brenham for local workers making \$35,000 or less.
- CDS estimates that only 530 total market rate apartment units exist in Brenham.
- CDS believes there is at least an initial demand for 150-200 new market rate one and two bedroom multifamily apartment rental units in Brenham with pricing close to what is paid at market rate units in areas they currently live at an average monthly rental rate of \$1,150 per month.

### ***Single-Family Detached Rentals***

- Using PCensus 2021 data out of 6,251 total occupied units 3,710 were owner occupied and 2,541 were renter occupied. Of the renter occupied units CDS estimates 1,000 were multifamily apartment units and 1,541 were single-family rental units.
- The smallest and oldest single-family rental units with minimal to no rehab was in the \$400 to \$600 per month range with three bedroom units getting a slightly higher rate from \$650 to \$900.
- Newer built or more recently updated units were in the \$950 to \$1,200 range and the largest and newest units rented in the range of \$1,250 to \$2,000 or more.
- These rental houses, when available, can rent within hours to days after tenant turnover. The only downtime is when they are being remodeled or renovated.
- Single-family rental units in Brenham appeared to be well maintained, even the lowest priced, least renovated units.
- The supply of new single-family rentals has essentially disappeared as most eligible homes have all been bought, repaired, improved and rented out. The increase in the price of the oldest existing single-family homes to the current price of around \$160,000 in Brenham has priced out single-family rental investors.

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## Single-Family For-Sale Homes

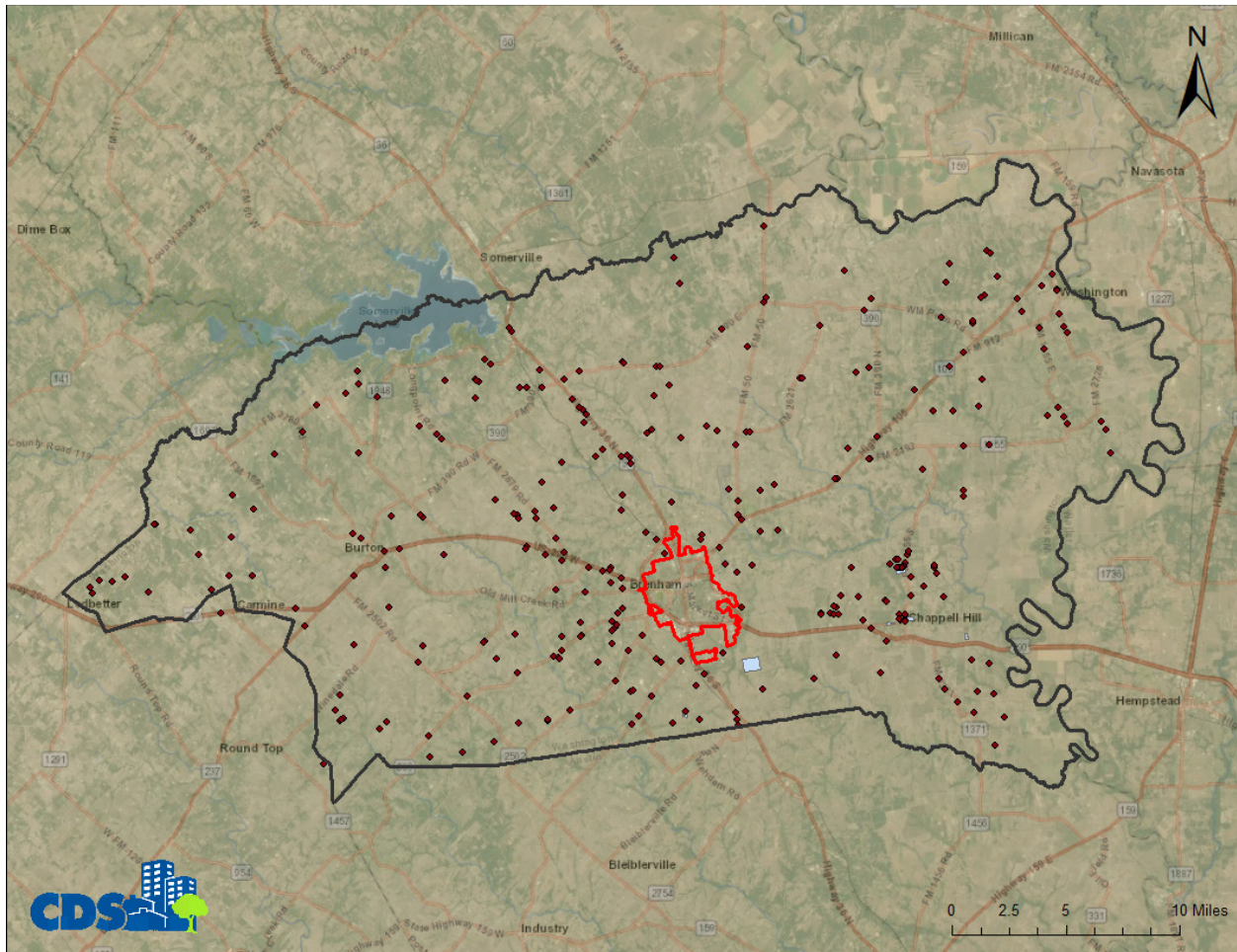
- The median owner-occupied housing unit value for Brenham was estimated to be \$195,442.
- Home sale volumes increased each year since 2011. Total sales overall increased from 201 in 2011 to 321 in 2020.
- The year 2017 saw the greatest volume of single-family home sales out of the past 10 years with 368 sales on the MLS. This does not consider pocket listings that occurred which were not listed.
- Since 2011 homes sold in the lowest two price bands of \$160,000 and less shrank sales volume from 57% of sales in 2011 to 16% of sales in 2020.
- Homes at the lowest price ranges of \$100,000 and below and \$100,000 to \$159,999 went from a high of 65% of all homes sold in Brenham in 2012 to a low of just 17% in 2020.
- On the other hand, homes priced \$160,000 to \$239,999 made up 26% of home sales in 2011 to 40% in 2020.
- Homes that sold at prices \$240,000 and greater represented 17% of sales in 2011 and 44% of sales in 2020.
- The increase of home prices sold in Brenham since 2011 and particularly the sharp increase in prices of homes sold seen in 2018 and 2020 clearly exhibits the dynamics of supply and demand. As demand has gone up supply has not kept pace. In turn this has increased the price of single-family homes significantly.
- Median home price in Brenham has steadily increased 49% from around \$146,000 in 2011 to around \$218,000 in June 2021 at the time of this report.
- Homes sold in less than 31 days in Brenham went from 9% of all homes sold in 2011 to 52%, of the 147 homes sold as of June 2021.
- Realtors interviewed for this report stated that the majority of home sales in Brenham over the past year were either all cash or 20% or more down payment with conventional loans, not FHA or other government backed loans.
- There were no homes listed in the two lowest price ranges, \$0-\$99,999 and \$100,000-\$159,999 as of June 2021. This gives evidence to the fact that there are no existing or new homes in Brenham for what had historically been considered entry-level prices or stock for new single-family rentals.
- 50% of the homes for sale as of June 2021 in Brenham were priced \$280,000 and greater.
- Based on 2020 sales volume Brenham averaged 27 sales per month. With 45 homes listed for sale as of June 2021 single-family home supply inventory was only 1.6 months, a clear sellers' market.
- Generally, a supply greater than seven months is considered a buyers' market, between five to seven months is a balanced market, and less than five months is a sellers' market.
- 1.6 months of homes on the market makes Brenham as mentioned a very strong sellers' market and very tight market for prospective buyers. This shows the extreme lack of supply and housing choice options for prospective Brenham home buyers.

- More than half of existing homeowners in Brenham had no mortgage.
- At the time of this report the lowest new entry level single-family homes were selling in the \$250,000 to \$300,000 range.
- In total there were more than 700 combined total single-family lots in various phases of development and vertical construction at the time of this report.
- Since 2011 there have been 3,220 total single-family homes sold in Brenham, an average of about 300 per year.
- This gives the estimated 700 single-family lot inventory about a one and a half year supply of new single-family homes in Brenham if no new lots were developed.
- Land and lot prices has risen very sharply in the last three years, in some cases going from \$5,000 to \$10,000 per lot for vacant residential lots in the City limits to \$30,000 to \$80,000.
- Builders noted that they must negotiate a planned development district with the City in order to build homes on lots smaller than a 7,000 square foot lot (typically 55' x 130' or 60' x 120'). Stylecraft noted very high interest and demand for their new townhomes in Vintage Farms on 3,600 square foot lots (30' x 120').
- CDS believes the construction of 50 to 75 or more new entry level single-family homes each of the next several years priced between \$180,000 to \$260,000 would be quickly absorbed. If mortgage rates do not remain low, then required incomes for financing will increase and disqualify some middle income workers from homeownership even without an increase in home prices.

## STUDY AREA DESCRIPTION

Brenham is located in Central Texas in Washington County. It is the county seat of Washington County. Brenham is south of College Station, and about halfway between Houston and Austin approximately 70 miles northwest of Houston, and about 90 miles east of Austin.

Brenham is renowned as the heart of the bluebonnet region in Central Texas and also contains many historic buildings and a downtown with shopping, dining and regularly scheduled community events. Brenham is also known for its annual German heritage festival. The Brenham area has wineries, farms and antique stores. It is also the headquarters for Blue Bell Creameries factory and creamery.



The map above shows an outline of Washington County in black and an outline of the City of Brenham in red. The dark red dots on the map show the location of septic tank permits issued around the County in 2020 and 2021 which gives an indication of the location and distribution of new residential single-family home locations for residents of Washington County residing outside of the City of Brenham.

## DEMOGRAPHIC AND ECONOMIC ANALYSIS

Understanding the demographic trends for an area is an important element in assessing the market demand for new housing. Past, present and future demographic figures were collected and estimated by utilizing data from the following sources: U.S. Census Bureau, American Community Survey, PCensus for ArcView (hereafter referred to as “PCensus”), Bureau of Labor Statistics, Texas Workforce Commission Labor Market Information, Quarterly Census of Employment and Wages (QCEW), Brenham Washington County Economic Development, Washington County Chamber of Commerce, Brenham Association of Realtors and primary research completed by CDS Community Development Strategies.

Thanks goes out to Washington County and all local businesses and other entities who provided information and data instrumental in completing this report.

### Population and Households

Table 1 provides population and household counts for 2000 and 2010, as well as estimates for 2021 and projections for 2026.

**Table 1: Population and Households, 2000 to 2026**

Population	2000 Census	2010 Census	2021 PCensus	2026 Projection	Change 2010 to 2021	% Change 2010 to 2021	Change 2021 to 2026	% Change 2021 to 2026
<b>Brenham</b>	14,822	15,716	<b>16,892</b>	17,542	1,176	7%	650	4%
<b>Washington County</b>	30,374	33,718	<b>36,290</b>	38,162	2,572	8%	1,872	5%
Households	2000 Census	2010 Census	2021 PCensus	2026 Projection	Change 2010 to 2021	% Change 2010 to 2021	Change 2021 to 2026	% Change 2021 to 2026
<b>Brenham</b>	5,445	5,914	<b>6,251</b>	6,571	337	6%	320	5%
<b>Washington County</b>	11,322	13,037	<b>14,068</b>	14,933	1,031	8%	865	6%

Source: PCensus 2021

- Based on the data in Table 1 population and households in the City and County over the past 10 years has experienced an increase of net 1,176 and 2,572 residents, respectively.
- The area is experiencing moderate population growth from 2010 through 2021 at an average annual rate of 106 and 233 per year, respectively.
- In the past 11 year Brenham’s growth represented a 46 % share of the total population growth of the County, showing that almost half of the entire County’s new population growth occurred in the City.
- Current estimated population increases in Brenham and Washington County is another 650 and 1,872 persons respectively through 2026.
- At the moment Brenham population represents a 47% share of the estimated current total population residing in Washington County and a 44% share of the County’s households.

## Age Distribution

Table 2 has the breakdown of the population by age in Brenham and Washington County for 2021.

The total population as well as cohorts of 16 and over, 18 and over, 21 and over and 65 and older have been identified along with their respective percentages of total population in 2021.

- Currently the median age in Brenham is 37.09 and the County at 41.82.
- The dominant age cohorts for Brenham in order of share of total City population:
- age 35 to 44 – 11% (1,916)
- age 55 to 64 – 11% (1,805)
- age 25 to 34 – 10% (1,743)
- Age 15 to 17 cohort had the least share of population at 4% (624).
- Age 65 and Over represented 20% (3,434) of the population.

**Table 2: Population by Age, 2021**

Age	Brenham		Washington County	
	Count	%	Count	%
<b>Total</b>	<b>16,892</b>		<b>36,290</b>	
Age 0 to 4	1,039	6%	2,074	6%
Age 5 to 9	1,049	6%	2,125	6%
Age 10 to 14	1,076	6%	2,178	6%
Age 15 to 17	624	4%	1,366	4%
Age 18 to 20	1,566	9%	2,241	6%
Age 21 to 24	948	6%	1,857	5%
Age 25 to 34	1,743	10%	3,701	10%
Age 35 to 44	1,916	11%	3,818	11%
Age 45 to 54	1,692	10%	3,840	11%
Age 55 to 64	1,805	11%	4,839	13%
Age 65 to 74	1,534	9%	4,428	12%
Age 75 to 84	1,036	6%	2,432	7%
Age 85 and over	864	5%	1,391	4%
Age 16 and over	13,525	80%	29,465	81%
Age 18 and over	13,104	78%	28,547	79%
Age 21 and over	11,538	68%	26,306	72%
Age 65 and over	3,434	20%	8,251	23%
<b>Median Age</b>	<b>37.09</b>		<b>41.82</b>	

Source: PCensus 2021



## Race and Ethnicity

Table 3 shows the estimated 2021 ethnic makeup of Brenham and Washington County.

- Most of the population in both areas have a mostly White population greater than 50%.
- Those in Brenham who identified as Hispanic, or Latino represented 17% of the total population.

**Table 3: Ethnic Makeup, 2021**

Ethnicity	Brenham		Washington County	
	Count	%	Count	%
<b>Total Population</b>	<b>16,892</b>	<b>100%</b>	<b>36,290</b>	<b>100%</b>
White Alone	9,546	57%	22,732	63%
Black or African American Alone	3,888	23%	5,956	16%
American Indian and Alaska Native Alone	39	0%	92	0%
Asian Alone	345	2%	667	2%
Native Hawaiian and Other Pacific Islander Alone	12	0%	14	0%
Some Other Race Alone	23	0%	35	0%
Two or More Races	221	1%	426	1%
Hispanic or Latino	<b>2,818</b>	<b>17%</b>	<b>6,368</b>	<b>18%</b>
Not Hispanic or Latino	<b>14,074</b>	<b>83%</b>	<b>29,922</b>	<b>82%</b>

Source: PCensus 2021

## Household Size and Type

Table 4 shows 2021 household size and estimated average household size for the City and County. Note that group quarters population like student and supported living is not captured in the household population or the number of households. This is because the focus of this study is primarily on local worker households and the specific housing demand they create. The local workforce’s housing needs and preferences ultimately has a large impact on local employers and the local economy.

It should be noted that Blinn College manages approximately 1,800 dormitory beds, more than any other community college in Texas, and is a sizable potential market that is excluded from this data. Some of the student population lives off-campus and is captured in these figures, whether living alone, with roommates, or with family. Blinn College at the time of this study recently completed 262 new dorm rooms with 504 beds.

- The estimated average household size for the study areas are:
  - Brenham – 2.33
  - Washington County – 2.40
- Family households were the predominate household type of both areas accounting for 63% and 68% of households in the City and County, respectively.
- Brenham family households were 37% and Washington County family households were 32%.
- The most prevalent household sizes in Brenham were:
  - 1-person households with a 34% share of total households at 2,111 households
  - 2-person households with a 33% share of total households at 2,044 households
  - 3-person households dropped to a 14% share of total households at 898

**Table 4: Household Size and Type, 2021**

Household Size	Brenham		Washington County	
	Count	%	Count	%
<b>Total:</b>	<b>6,251</b>	<b>100%</b>	<b>14,068</b>	<b>100%</b>
1-person household	2,111	34%	4,019	29%
2-person household	2,044	33%	5,211	37%
3-person household	898	14%	2,041	15%
4-person household	657	11%	1,592	11%
5-person household	338	5%	732	5%
6-person household	134	2%	298	2%
7-or-more person household	69	1%	175	1%
<b>Average Household Size</b>	<b>2.33</b>		<b>2.40</b>	
<b>Family Households</b>	3,920	63%	9,619	68%
<b>Nonfamily Households</b>	2,331	37%	4,449	32%

Source: PCensus 2021

Table 5 shows households by presence of children, householders with no children and married households in Brenham and Washington County.

- According to the data 69% of households in Brenham (4,328) had no children younger than 18 years old in their household.
- Of households with one or more people younger than 18, the majority are married-couple families followed by other family, female householder householders in each study area.
- Of households with no people younger than 18, 38% are married-couple families.

**Table 5: Household Type, 2021**

Households by Type	Brenham		Washington County	
	Count	%	Count	%
<b>Total Households</b>	<b>6,251</b>	<b>100%</b>	<b>14,068</b>	<b>100%</b>
With 1 or more People under Age 18	1,923	31%	4,174	30%
With No People under Age 18	4,328	69%	9,894	70%
<b>Households with 1 or more People under Age 18</b>	<b>1,923</b>	<b>31%</b>	<b>4,174</b>	<b>30%</b>
Married-Couple Family	1,091	57%	2,748	66%
Other Family, Male Householder	153	8%	316	8%
Other Family, Female Householder	659	34%	1,071	26%
Nonfamily, Male Householder	16	1%	32	1%
Nonfamily, Female Householder	4	0%	7	0%
<b>Households with No People under Age 18</b>	<b>4,328</b>	<b>69%</b>	<b>9,894</b>	<b>70%</b>
Married-Couple Family	1,634	38%	4,623	47%
Other Family, Male Householder	120	3%	291	3%
Other Family, Female Householder	262	6%	568	6%
Nonfamily, Male Householder	923	21%	1,959	20%
Nonfamily, Female Householder	1,389	32%	2,453	25%
<b>Family HH Type by Presence of Own Children</b>	<b>3,920</b>		<b>9,619</b>	
Married-Couple Family, own children	995	25%	2,494	26%
Married-Couple Family, no own children	1,733	44%	4,880	51%
Male Householder, own children	124	3%	256	3%
Male Householder, no own children	147	4%	354	4%
Female Householder, own children	555	14%	893	9%
Female Householder, no own children	366	9%	742	8%

Source: PCensus 2021

The table below shows past, current and future data for family households.

Additionally, the table shows families by poverty status in Brenham and Washington County.

A family household is a group of two or more people living together with the householder related by birth, marriage, or adoption.

Households are defined as any group of people residing together in one housing unit.

- There were 6,251 total households in Brenham with 63% (3,920) family households.
- Families at or above poverty were approximately 86% (3,360) of all families in Brenham.
- In Brenham there was an estimated 15% (915) of all households that were family households below poverty, 6% (358) were family households below poverty with children.

**Table 6: Family Households and Poverty, 2021**

Family Households	Brenham		Washington County	
	Count	%	Count	%
<b>Total Households</b>	<b>6,251</b>	<b>100%</b>	<b>14,068</b>	<b>100%</b>
2026 Projection	6,571	-	14,933	-
<b>2021 Estimate</b>	<b>6,251</b>	-	<b>14,068</b>	-
2010 Census	5,914	-	13,037	-
2000 Census	5,445	-	11,322	-
Growth 2021-2025	5.12%	-	6.15%	-
Growth 2010-2021	5.70%	-	7.91%	-
Growth 2000-2010	8.61%	-	15.15%	-
<b>2021 Families by Poverty Status</b>	<b>3,920</b>	<b>63%</b>	<b>9,619</b>	<b>68%</b>
At or Above Poverty	3,360	86%	8,625	90%
At or Above Poverty with Children	1,416	36%	3,013	31%
<b>Total Below Poverty</b>				
Below Poverty	560	14%	994	10%
Below Poverty with Children	358	9%	638	7%

Source: PCensus 2021

## Educational Attainment

Table 7 provides 2021 educational attainment data, which shows the highest level of education attained by the 25 years and older population.

Brenham and Washington County employment as of 2021 was mainly concentrated in Healthcare and Social Assistance, Manufacturing, Retail, Educational Services, Accommodation and Food Services, and Wholesale Trade.

In large part, employment in those industries are blue collar and require more training than higher education degrees.

The educational attainment of the populace over age 25 shows about 15% in Brenham had less than a high school education.

**Table 7: Educational Attainment, 2021**

Educational Attainment	Brenham		Washington County	
	Count	%	Count	%
<b>Pop Age 25+</b>	<b>10,590</b>	<b>100%</b>	<b>24,449</b>	<b>100%</b>
Less than 9th grade	709	7%	1,538	6%
Some High School, no diploma	846	8%	1,929	8%
High School Graduate (or GED)	3,530	33%	7,983	33%
Some College, no degree	2,251	21%	5,223	21%
Associate Degree	651	6%	1,673	7%
Bachelor's Degree	1,617	15%	3,959	16%
Master's Degree	718	7%	1,508	6%
Professional School Degree	100	1%	288	1%
Doctorate Degree	168	2%	348	1%

Sources: Nielson 2010, PCensus 2021

## School District Enrollment

Table 8 shows enrollment in Brenham Independent School District from 2013 to 2020.

**Table 8: Brenham ISD K-12 School Enrollment, 2013 to 2020**

ISD Enrollment	2013	2014	2015	2016	2017	2018	2019	2020
<b>Totals by Year</b>	<b>5,202</b>	<b>5,166</b>	<b>5,164</b>	<b>5,272</b>	<b>5,266</b>	<b>5,277</b>	<b>5,358</b>	<b>5,338</b>

Source: Texas Education Agency

- The most current enrollment count for Brenham ISD was 5,338.
- Enrollment has increased by about 130 net new students since 2013.
- The most current enrollment county for Burton ISD was 476.

## Household Income

Table 9 shows household income in 2021 for Brenham and Washington County.

The City contains a disproportionately higher share (55%) of all lower-income households (<\$35k) residing within Washington County and a disproportionately lower share (38%) of all higher-income households (>\$100k).

It should be noted that average household income in 2021 was significantly higher than the median household income which suggests greater concentrations of household incomes close to the median income, and a smaller number of much higher incomes which increases the average household income greater than the median.

**Table 9: Household Income, 2021**

Household Income	Brenham		Washington County	
	Count	%	Count	%
<b>Total Households</b>	<b>6,251</b>	<b>100%</b>	<b>14,068</b>	<b>100%</b>
< \$15,000	753	12%	1,461	10%
\$15,000 to \$24,999	788	13%	1,326	9%
\$25,000 to \$34,999	790	13%	1,483	11%
\$35,000 to \$49,999	665	11%	1,731	12%
\$50,000 to \$74,999	1,053	17%	2,480	18%
\$75,000 to \$99,999	847	14%	1,982	14%
\$100,000 to \$124,999	456	7%	1,164	8%
\$125,000 to \$149,999	286	5%	752	5%
\$150,000 to \$199,999	263	4%	712	5%
\$200,000 to \$249,999	116	2%	328	2%
\$250,000 to \$499,999	154	2%	426	3%
\$500,000+	80	1%	223	2%
<b>Average Household Income</b>	<b>\$76,057</b>	-	<b>\$84,610</b>	-
<b>Median Household Income</b>	<b>\$53,075</b>	-	<b>\$60,413</b>	-

Sources: PCensus 2021

- Median household income in Brenham for 2021 was estimated to be \$53,075, slightly lower than Washington County.
- Approximately 48% (2,996) of households in the City had a household income less than \$50,000.
- The greatest household income cohorts in Brenham were \$50,000 to \$74,999 with 1,053 (17%), followed by \$55,000 to \$99,999 with 847 (14%), and \$25,000 to \$34,999 with 790 (11%).

Table 10 shows households by income, average household and median household income projections for 2026.

**Table 10: Household Income, 2026**

Household Income	Brenham		Washington County	
	Count	%	Count	%
<b>Total Households</b>	<b>6,571</b>	<b>100%</b>	<b>14,933</b>	<b>100%</b>
< \$15,000	720	11%	1,442	10%
\$15,000 to \$24,999	770	12%	1,298	9%
\$25,000 to \$34,999	826	13%	1,515	10%
\$35,000 to \$49,999	755	11%	1,858	12%
\$50,000 to \$74,999	980	15%	2,434	16%
\$75,000 to \$99,999	896	14%	2,109	14%
\$100,000 to \$124,999	546	8%	1,356	9%
\$125,000 to \$149,999	332	5%	872	6%
\$150,000 to \$199,999	316	5%	850	6%
\$200,000 to \$249,999	151	2%	417	3%
\$250,000 to \$499,999	177	3%	497	3%
\$500,000+	102	2%	285	2%
<b>Average Household Income</b>	<b>\$81,118</b>	-	<b>\$90,109</b>	-
<b>Median Household Income</b>	<b>\$55,472</b>	-	<b>\$63,902</b>	-

Sources: PCensus 2021

- Estimated projections for 2026 show Brenham gaining a net 320 households, and considerable increase of average household incomes.
- The 2026 income projection does not expect the distribution of income levels to alter much from 2021 estimates.

Table 11 displays the employers that provide the economic foundation of the local Washington County and Brenham economy.

Estimates indicate around 12,000 employees working at the largest businesses located in Brenham.

Some of the largest employers in Brenham shared with CDS that demand for their products and services has increased to the point of needing and wanting to hire additional workers and some would like to make on site facility expansions.

However, these companies are working hard to decide the feasibility of expanding in Brenham or elsewhere due to the lack of new market rate multifamily apartment rental and for-sale homes.

In addition, the lack of market rate apartment units hampers the ability of existing and new local small businesses to grow because the tight housing market requires either higher wages to live in the City or longer commute times to live outside. Both of these factors make it hard for local small and medium size businesses to hire new workers and expand local operations.

**Table 11: Major Washington County Employers**

Company	Employees
Blue Bell Creameries LP	1,000-4,999
Blinn College	500-999
Brenham State Supported Living Center	500-999
Brenham ISD	500-999
Germania Insurance	250-499
Wal-Mart Supercenter	250-499
Baylor Scott & White Medical Center	100-249
Brenham Clinic	100-249
Brenham Nursing & Rehabilitation	100-249
Brenham Wholesale	100-249
Emerson	100-249
HEB Foods	100-249
Home Depot	100-249
<b>Total</b>	<b>12,000</b>

Source: Brenham Washington County Economic Development

Brenham and Washington County are experiencing significant growth that may be attributed to several factors: 1) overall population growth in Texas spurred by the perception of a pro-business economy, 2) convenient location approximately equidistant between the major metro areas of Houston and Austin, and 3) less population density of rural communities has become attractive through the COVID pandemic.

Brenham Community Development Corporation (BCDC) owns available land in two business parks where all sites are shovel-ready with road and utility infrastructure. Five tracts of land in these business parks have sold for new business development during 2021. Options and contracts are pending on two other industrial park sites. In addition, a 173-acre tract of land east of the Brenham city limits on US290 was purchased and the company plans groundbreaking in 1<sup>st</sup> quarter of 2022 for a large manufacturing



operation. Existing businesses in Brenham continue to thrive with five companies currently engaged in expansion operations that will add square footage to their buildings, additional equipment and workforce.

Retail and service industry businesses are expanding as well. Baker Katz is developing a 30-acre tract of land on US290 that at build-out will provide over 200,000 sf of retail space. Currently committed to the project are: Hobby Lobby, Marshall's, Five Below, Burke's Outlet, PetSmart, Mod Pizza, and Aspen Dental. Another mixed-use project, the 50-acre Market Square development on US290, will include retail, hospitality, multi-family and other commercial development.

Brenham is historically a regional commerce hub and the continued vibrancy of Downtown Brenham is a testament to that status. Strong investment remains a hallmark of the central business district as 10 properties have changed ownership in 2021. Renovation and restoration projects that include commercial, retail, and residential have been completed or are underway with completion dates in the early part of 2022.

## Occupation of Residents

Table 12 displays employment by occupation for residents aged 16 and older residing in Brenham and Washington County in 2021. This data describes the work of residents who live in Brenham and Washington County, regardless of the physical location of their employment.

In Brenham 56% (3,805) of employed residents were employed in White Collar occupations, 26% (1,727) in Blue Collar and 18% (1,248) in Service and Farm.

- Brenham has about 7,000 residents age 16+ working, 41% of the estimated 17,000 City’s residents. The top occupations for residents of Brenham were:
  - Office/Admin. Support (11%), Sales/Related (11%) and Production (10%). These occupations accounted for 31% of the 6,780 employed residents in Brenham

**Table 12: Occupation of Residents, 2021 Age 16 and Older**

Occupation	Brenham		Washington County	
	Count	%	Count	%
<b>Civilian Employed Pop 16+ by Occupation</b>	<b>6,780</b>	<b>100%</b>	<b>15,585</b>	<b>100%</b>
Architect/Engineer	66	1%	158	1%
Arts/Entertainment/Sports	67	1%	189	1%
Building Grounds Maintenance	320	5%	720	5%
Business/Financial Operations	374	6%	760	5%
Community/Social Services	152	2%	307	2%
Computer/Mathematical	102	2%	147	1%
Construction/Extraction	366	5%	1,006	6%
Education/Training/Library	553	8%	1,106	7%
Farming/Fishing/Forestry	60	1%	235	2%
Food Prep/Serving	385	6%	678	4%
Healthcare Practitioner/Technician	435	6%	907	6%
Healthcare Support	174	3%	549	4%
Maintenance Repair	315	5%	661	4%
Legal	4	0%	35	0%
Life/Physical/Social Science	12	0%	24	0%
Management	554	8%	1,747	11%
Office/Admin. Support	751	11%	1,587	10%
Production	692	10%	1,414	9%
Protective Service	133	2%	321	2%
Sales/Related	735	11%	1,612	10%
Personal Care/Service	176	3%	328	2%
Transportation/Moving	354	5%	1,094	7%
<b>2021 Est. Pop 16+ by Occupation Classification</b>				
Blue Collar	1,727	25%	4,175	27%
White Collar	3,805	56%	8,579	55%
Service & Farm	1,248	18%	2,831	18%

Sources: PCensus 2021

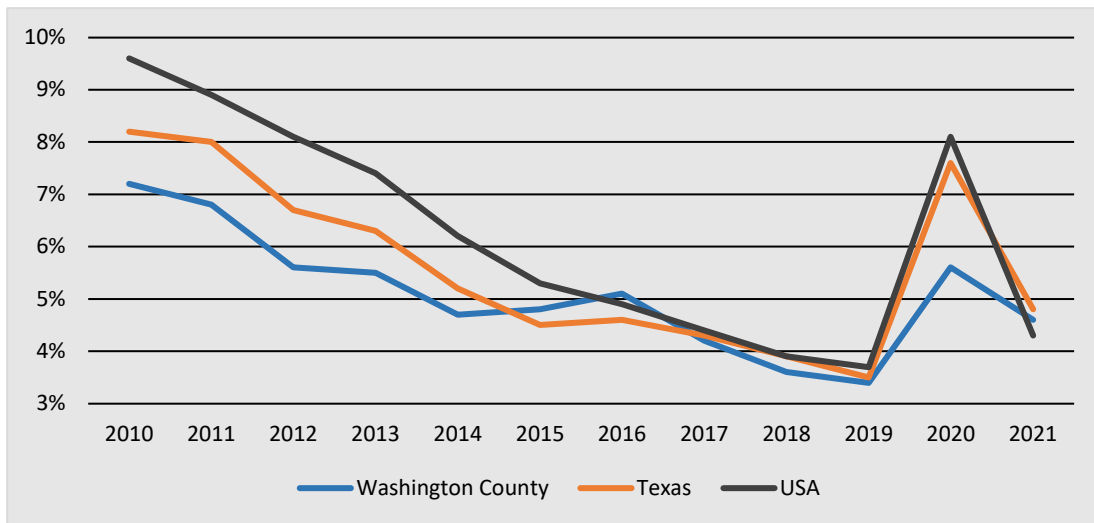
## Unemployment Rates

The chart below shows the un-adjusted unemployment rate for Washington County, Texas and USA from 2010 to October 2021.

Pre-pandemic unemployment for Washington County peaked in 2016 at 5.1% in large part due to the Blue Bell Creameries lays off of 1,450 employees due to a listeria outbreak in addition to the upstream energy contraction. Washington County and Brenham's ability to quickly rebounded from that two-pronged crisis is notable.

Washington County's unemployment rate at the time of this report was 4.6%. Although speculative, it may be that Washington County's food production sector helped to buffer it from the worst employment effects of the pandemic. This is a sign of the strength and stability of the economies of Brenham and Washington County.

**Figure 13: United States, Texas and Washington County Unemployment Rates**



Source: Texas Workforce Commission. Not Seasonally Adjusted

## Industries Impacted by COVID-19

Data from the Texas Workforce Commission (TWC) released on June 22, 2021, showed that for the reporting period May 12, 2021, to June 12, 2021, the industry sectors in Washington County with the greatest amount of unemployment claims were:

- School and employee bus transportation
- Urban and rural development administration
- Full-service restaurants
- Druggists' goods merchant wholesalers
- Supermarkets and other grocery stores

The County was estimated to have a population of 35,801 with an unemployment insurance claimant count of just 153 for the reporting period of 5/12/21 – 6/12/21. This was down from the previous period 5/5/21 – 6/5/21 of reporting which had 158 claimants.

## Washington County Employment Data

The following section contains employment data for Washington County from the Texas Workforce Commission's Quarterly Census of Employment and Wages (QCEW). CDS examined 10 years of data from the QCEW, 2<sup>nd</sup> Quarter annual averages from 2011 through 2020, for employment, establishments, and average weekly wages. Reliable workforce and economic data are not available at the City level therefore data for these uses was sourced at the County level. All of Brenham is contained within Washington County and is the largest City and employment center in the County.

The data presented in this section of the report is divided by industry using the North American Industry Classification System (NAICS) Code. It is also sorted order by largest to smallest unless otherwise noted. This data involves jobs located within Washington County, not the employment of Washington County residents.

Data from 2018 LEHD later in this section provides estimates of job inflow and outflow in Brenham to distinguish between those who live and work in the City.

Many County residents do stay in the County for their employment but many travel elsewhere. It should also be noted that QCEW data covers payroll employment and does not monitor personal individual employment. Also, many do travel into the County to work. The three tables on the following pages contain the raw data taken from the QCEW analyzed throughout this section.

- Contraction in manufacturing from 2014 to 2017 was largely due to the listeria outbreak and energy-related slowdowns.
- Although the contraction was painful and although the ten-year trend is basically flat, the rate of growth in recent years is stable and continues to be promising and those employers noted a current need of additional workers.
- Increase of accommodation and food service employment in the past several years indicates a need for additional rental housing geared to these workers.
- Reduction in direct local employment of upstream energy, has not rebounded along with other manufacturing which could indicate local economic diversification is filling that void and any future volatility associated with this sector may be mitigated by a diversifying local economy.

**Table 14: Employment by Industry – Yearly Average – Washington County**

In Order of Q2 2020 Largest to Smallest

Industry	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Health Care and Social Assistance	2,900	2,934	2,862	2,786	2,820	2,907	2,807	2,761	2,903	2,707
Manufacturing	2,683	2,883	2,959	3,003	2,451	2,347	2,407	2,438	2,580	2,677
Retail Trade	1,997	2,077	2,088	1,998	2,034	2,023	1,974	1,933	2,002	1,984
Educational Services	1,469	1,444	1,444	1,475	1,461	1,424	1,359	1,387	1,431	1,365
Accommodation and Food Services	1,089	1,172	1,195	1,167	1,233	1,238	1,221	1,321	1,451	1,281
Wholesale Trade	787	771	795	844	893	930	921	950	1,037	1,054
Finance and Insurance	693	697	702	708	723	755	773	786	813	831
Construction	624	552	593	603	611	627	621	646	700	708
Administrative and Support and Waste Management and Remediation Services	368	385	358	302	318	335	452	419	404	410
Public Administration	368	378	377	389	375	385	400	388	403	402
Professional, Scientific, and Technical Services	293	287	300	313	314	301	304	322	341	345
Transportation and Warehousing	285	340	365	559	487	474	505	500	366	332
Other Services (except Public Administration)	243	232	267	224	231	235	237	263	245	250
Agriculture, Forestry, Fishing and Hunting	139	141	128	134	134	176	178	179	153	160
Arts, Entertainment, and Recreation	148	157	143	157	154	159	152	151	179	158
Real Estate and Rental and Leasing	128	132	148	138	145	126	139	133	147	136
Information	165	160	170	199	170	164	152	131	118	98
Utilities	69	72	74	74	71	73	75	77	71	75
Mining, Quarrying, and Oil and Gas Extraction	189	214	238	311	247	76	77	78	73	60
Unclassified		5			5	34	27		11	16
Management of Companies and Enterprises	8	8	10	10	10	9	8	13	9	10
<b>Total, All Industries</b>	<b>14,645</b>	<b>15,041</b>	<b>15,216</b>	<b>15,394</b>	<b>14,887</b>	<b>14,798</b>	<b>14,789</b>	<b>14,876</b>	<b>15,437</b>	<b>15,059</b>

Source: Texas Workforce Commission Quarterly Census of Employment and Wages (QCEW)

**Table 15: Establishments by Industry – Yearly Average – Washington County**

In Order of Q2 2020 Largest to Smallest

Industry	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Retail Trade	133	134	133	131	128	126	127	128	120	122
Construction	101	93	94	95	98	102	104	105	108	106
Health Care and Social Assistance	81	83	80	76	79	82	91	93	98	95
Accommodation and Food Services	82	84	82	75	75	73	80	89	95	95
Professional, Scientific, and Technical Services	62	59	61	65	64	63	62	71	68	73
Other Services (except Public Administration)	72	76	81	75	74	72	72	67	67	71
Manufacturing	59	60	60	63	63	60	61	63	61	61
Finance and Insurance	55	59	56	56	58	58	58	56	53	59
Administrative and Support and Waste Management and Remediation Services	33	37	33	34	35	38	39	43	47	56
Agriculture, Forestry, Fishing and Hunting	49	42	41	45	47	49	52	55	52	52
Wholesale Trade	43	40	42	46	49	46	47	45	49	48
Real Estate and Rental and Leasing	36	36	41	38	41	39	39	39	38	36
Public Administration	32	38	34	35	31	30	32	31	32	32
Transportation and Warehousing	21	26	26	27	27	27	27	29	27	26
Arts, Entertainment, and Recreation	10	11	12	14	15	13	12	13	14	16
Unclassified		3			4	12	12		10	11
Information	15	15	15	17	15	14	13	12	12	10
Mining, Quarrying, and Oil and Gas Extraction	16	17	17	17	16	15	14	13	12	10
Educational Services	10	11	11	9	8	8	8	7	7	7
Utilities	7	8	8	7	7	7	7	7	7	7
Management of Companies and Enterprises	3	3	3	3	3	3	4	4	3	3
<b>Total, All Industries</b>	<b>920</b>	<b>935</b>	<b>930</b>	<b>928</b>	<b>937</b>	<b>937</b>	<b>961</b>	<b>970</b>	<b>980</b>	<b>996</b>

Source: Texas Workforce Commission Quarterly Census of Employment and Wages (QCEW)

**Table 16: Average Weekly Wages by Industry – Washington County**

In Order of Q2 2020 Largest to Smallest

Industry	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Mining, Quarrying, and Oil and Gas Extraction	\$1,863	\$2,524	\$2,645	\$2,740	\$2,335	\$1,665	\$1,521	\$1,466	\$1,928	\$1,928
Finance and Insurance	\$1,077	\$1,038	\$1,079	\$1,088	\$1,164	\$1,220	\$1,368	\$1,475	\$1,540	\$1,748
Utilities	\$1,007	\$1,005	\$1,016	\$1,033	\$1,314	\$1,275	\$1,263	\$1,366	\$1,422	\$1,421
Professional, Scientific, and Technical Services	\$1,020	\$933	\$1,042	\$1,063	\$1,068	\$1,149	\$1,222	\$1,280	\$1,242	\$1,311
Wholesale Trade	\$1,058	\$1,105	\$1,115	\$1,164	\$1,028	\$1,005	\$1,069	\$1,071	\$1,080	\$1,236
Real Estate and Rental and Leasing	\$1,049	\$1,225	\$1,111	\$1,148	\$915	\$981	\$1,078	\$1,266	\$1,386	\$1,205
Manufacturing	\$939	\$979	\$980	\$1,026	\$950	\$920	\$960	\$940	\$1,014	\$1,115
Public Administration	\$782	\$789	\$760	\$795	\$882	\$954	\$968	\$1,001	\$1,008	\$1,100
Construction	\$740	\$856	\$853	\$863	\$1,041	\$957	\$981	\$950	\$1,029	\$1,058
Educational Services	\$699	\$687	\$710	\$745	\$774	\$833	\$826	\$870	\$882	\$969
Agriculture, Forestry, Fishing and Hunting	\$538	\$529	\$598	\$643	\$634	\$586	\$618	\$675	\$756	\$940
Unclassified		\$223			\$694	\$706	\$734		\$734	\$839
Administrative and Support and Waste Management and Remediation Services	\$538	\$522	\$575	\$682	\$785	\$679	\$647	\$645	\$686	\$776
Health Care and Social Assistance	\$519	\$530	\$553	\$567	\$610	\$615	\$624	\$680	\$700	\$729
Transportation and Warehousing	\$849	\$1,237	\$1,453	\$575	\$631	\$585	\$609	\$633	\$664	\$700
Retail Trade	\$468	\$485	\$508	\$542	\$575	\$567	\$602	\$603	\$591	\$690
Other Services (except Public Administration)	\$509	\$521	\$507	\$573	\$591	\$593	\$579	\$577	\$613	\$624
Information	\$646	\$709	\$674	\$721	\$1,280	\$603	\$1,177	\$572	\$576	\$608
Management of Companies and Enterprises	\$1,045	\$1,199	\$1,093	\$1,081	\$1,167	\$1,156	\$1,760	\$896	\$588	\$530
Accommodation and Food Services	\$265	\$286	\$286	\$297	\$302	\$305	\$325	\$343	\$348	\$380
Arts, Entertainment, and Recreation	\$242	\$245	\$259	\$247	\$263	\$259	\$283	\$287	\$311	\$319
<b>Total, All Industries</b>	<b>\$793</b>	<b>\$839</b>	<b>\$891</b>	<b>\$880</b>	<b>\$905</b>	<b>\$839</b>	<b>\$915</b>	<b>\$880</b>	<b>\$909</b>	<b>\$963</b>

Source: Texas Workforce Commission Quarterly Census of Employment and Wages (QCEW)

## Industry Sectors

The five largest industry sectors by employment in Washington County are:

- Health Care and Social Assistance (18%), Manufacturing (18%), Retail Trade (13%), Educational Services (9%), and Accommodation and Food Services (9%).

Combined, these five industries employ 10,014 workers which account for 67% of all jobs in the County.

A total of 15,059 jobs were located in Washington County, coupled with 996 establishments.

The 2020 average weekly wage for the County was \$963.

**Table 17: Industries Ranked by 2020 Employment – Washington County**

Rank	Industry	Employees	Share of Employment	Avg. Weekly Wage	Establishments
1	Health Care and Social Assistance	2,707	18%	\$729	95
2	Manufacturing	2,677	18%	\$1,115	61
3	Retail Trade	1,984	13%	\$690	122
4	Educational Services	1,365	9%	\$969	7
5	Accommodation and Food Services	1,281	9%	\$380	95
6	Wholesale Trade	1,054	7%	\$1,236	48
7	Finance and Insurance	831	6%	\$1,748	59
8	Construction	708	5%	\$1,058	106
9	Administrative and Support and Waste Management and Remediation Services	410	3%	\$776	56
10	Public Administration	402	3%	\$1,100	32
11	Professional, Scientific, and Technical Services	345	2%	\$1,311	73
12	Transportation and Warehousing	332	2%	\$700	26
13	Other Services (except Public Administration)	250	2%	\$624	71
14	Agriculture, Forestry, Fishing and Hunting	160	1%	\$940	52
15	Arts, Entertainment, and Recreation	158	1%	\$319	16
16	Real Estate and Rental and Leasing	136	1%	\$1,205	36
17	Information	98	1%	\$608	10
18	Utilities	75	0%	\$1,421	7
19	Mining, Quarrying, and Oil and Gas Extraction	60	0%	\$1,928	10
20	Unclassified	16	0%	\$839	11
21	Management of Companies and Enterprises	10	0%	\$530	3
<b>Total, All Industries</b>		<b>15,059</b>	<b>100%</b>	<b>\$963</b>	<b>996</b>

Source: Texas Workforce Commission Quarterly Census of Employment and Wages (QCEW)



Industries in Washington County over the last 10 years saw an overall increase in employment at a rate of 3% (414) net new employees.

Individually, however, growth rates varied among sectors.

The table below illustrates growth and change by industry over the periods covering the last three, five and ten year periods.

Since 2018 the net largest numbers of employees were added in:

- Manufacturing (239), Wholesale Trade (104) and Construction (62).

Among the top employment industries, the most impressive growth rates were found in:

- Wholesale Trade (34%), Management (25%), and Finance and Insurance (20%) since 2011.

Wholesale Trade accounted for 267 new jobs from 2011 to 2020 and Mining, Quarrying, and Oil and Gas Extraction saw an employee loss of 129 and Health Care and Social Assistance decreased by 193.

Overall employment increased 4% adding 414 new jobs since 2011.

**Table 18: Employment Growth by Industry – Washington County**

In Order of 2011-2020 Largest Total Growth

Industry	Total Growth			Growth Rate		
	2018-2020	2016-2020	2011-2020	2018-2020	2016-2020	2011-2020
Wholesale Trade	104	124	267	11%	13%	34%
Accommodation and Food Services	-40	43	192	-3%	3%	18%
Finance and Insurance	45	76	138	6%	10%	20%
Construction	62	81	84	10%	13%	13%
Professional, Scientific, and Technical Services	23	44	52	7%	15%	18%
Transportation and Warehousing	-168	-142	47	-34%	-30%	16%
Administrative and Support and Waste Management and Remediation Services	-9	75	42	-2%	22%	11%
Public Administration	14	17	34	4%	4%	9%
Agriculture, Forestry, Fishing and Hunting	-19	-16	21	-11%	-9%	15%
Unclassified	16	-18	16		-53%	
Arts, Entertainment, and Recreation	7	-1	10	5%	-1%	7%
Real Estate and Rental and Leasing	3	10	8	2%	8%	6%
Other Services (except Public Administration)	-13	15	7	-5%	6%	3%
Utilities	-2	2	6	-3%	3%	9%
Management of Companies and Enterprises	-3	1	2	-23%	11%	25%
Manufacturing	239	330	-6	10%	14%	0%
Retail Trade	51	-39	-13	3%	-2%	-1%
Information	-33	-66	-67	-25%	-40%	-41%
Educational Services	-22	-59	-104	-2%	-4%	-7%
Mining, Quarrying, and Oil and Gas Extraction	-18	-16	-129	-23%	-21%	-68%
Health Care and Social Assistance	-54	-200	-193	-2%	-7%	-7%
<b>Total, All Industries</b>	<b>183</b>	<b>261</b>	<b>414</b>	<b>1%</b>	<b>2%</b>	<b>3%</b>

Source: Texas Workforce Commission Quarterly Census of Employment and Wages (QCEW)

The dominant employment sector is Health Care and Social Assistance at 18% of all wage earners followed by Manufacturing with 18% as well.

Retail Trade, Educational Services and Accommodation and Food Services are the other core sectors of the employment in the County.

Health Care and Social Assistance saw the greatest declines in share of employment since 2011 along with Manufacturing and Educational Services.

However, the top employers in those industries both mentioned they have demand for additional employment, but a lack of market rate rental housing has made it difficult for them to add new workers shifts and processes.

Wholesale Trade, Accommodation and Food Services and Finance and Insurance gained shares of employment since 2011.

**Table 19: Employment by Industry Share of Total Employment – Washington County**

In Order of 2020 - Largest to Smallest

Industry	2020	2018	2016	2011	2011-2020 Change
Health Care and Social Assistance	18%	19%	20%	20%	-2%
Manufacturing	18%	16%	16%	18%	-1%
Retail Trade	13%	13%	14%	14%	0%
Educational Services	9%	9%	10%	10%	-1%
Accommodation and Food Services	9%	9%	8%	7%	1%
Wholesale Trade	7%	6%	6%	5%	2%
Finance and Insurance	6%	5%	5%	5%	1%
Construction	5%	4%	4%	4%	0%
Administrative and Support and Waste Management and Remediation Services	3%	3%	2%	3%	0%
Public Administration	3%	3%	3%	3%	0%
Professional, Scientific, and Technical Services	2%	2%	2%	2%	0%
Transportation and Warehousing	2%	3%	3%	2%	0%
Other Services (except Public Administration)	2%	2%	2%	2%	0%
Agriculture, Forestry, Fishing and Hunting	1%	1%	1%	1%	0%
Arts, Entertainment, and Recreation	1%	1%	1%	1%	0%
Real Estate and Rental and Leasing	1%	1%	1%	1%	0%
Information	1%	1%	1%	1%	0%
Utilities	0%	1%	0%	0%	0%
Mining, Quarrying, and Oil and Gas Extraction	0%	1%	1%	1%	-1%
Unclassified	0%	0%	0%	0%	0%
Management of Companies and Enterprises	0%	0%	0%	0%	0%

Source: Texas Workforce Commission Quarterly Census of Employment and Wages (QCEW)

## Wage Profile and Projected Growth

Nine of the twenty-one industry sectors in Washington County pay an average weekly wage more than \$1,000 per week and the average weekly wage for all industries combined in the County was \$963.

This accounts for 6,288 jobs (42%) of all employed (15,059) in the County. In Texas the 2Q 2020 average weekly wage was \$841.

Germania is the largest employer in Finance and Insurance and recently expanded their corporate campus in Brenham and are one of the highest wage employers.

Manufacturing wages have by far the largest impact on the economy amounting to 22% of all wages and nearly \$39 million in total wages. Health Care and Social Assistance is the next highest impact with 14.4% of all wages. Retail Trade was also among the top sectors with the highest overall economic impact, yet this is due to their very large employment, yet low paying wages.

**Table 20: Industries Ranked by 2020 Average Weekly Wages – Washington County**

Rank	Industry	Wages	Employees	Establishments	Total Wages Paid
1	Mining, Quarrying, and Oil and Gas Extraction	\$1,928	60	10	\$1,504,069
2	Finance and Insurance	\$1,748	831	59	\$18,887,248
3	Utilities	\$1,421	75	7	\$1,378,964
4	Professional, Scientific, and Technical Services	\$1,311	345	73	\$5,873,744
5	Wholesale Trade	\$1,236	1,054	48	\$16,926,544
6	Real Estate and Rental and Leasing	\$1,205	136	36	\$2,135,797
7	Manufacturing	\$1,115	2,677	61	\$38,802,848
8	Public Administration	\$1,100	402	32	\$5,750,733
9	Construction	\$1,058	708	106	\$9,746,882
10	Educational Services	\$969	1,365	7	\$17,198,030
11	Agriculture, Forestry, Fishing and Hunting	\$940	160	52	\$1,960,206
12	Unclassified	\$839	16	11	\$178,232
13	Administrative and Support and Waste Management and Remediation Services	\$776	410	56	\$4,136,803
14	Health Care and Social Assistance	\$729	2,707	95	\$25,655,690
15	Transportation and Warehousing	\$700	332	26	\$3,022,293
16	Retail Trade	\$690	1,984	122	\$17,783,710
17	Other Services (except Public Administration)	\$624	250	71	\$2,026,968
18	Information	\$608	98	10	\$774,626
19	Management of Companies and Enterprises	\$530	10	3	\$68,840
20	Accommodation and Food Services	\$380	1,281	95	\$6,323,785
21	Arts, Entertainment, and Recreation	\$319	158	16	\$655,143
	<b>Total, All Industries</b>	<b>\$963</b>	<b>15,059</b>	<b>996</b>	<b>\$180,791,155</b>

Source: Texas Workforce Commission Quarterly Census of Employment and Wages (QCEW)

Overall average weekly wage for the County increased during each period analyzed since 2011, for a total growth rate for all industries combined of 21% or \$170.

Average weekly wages have had a continuous growth in the County each year from 2011 to 2020 although some industries like Management, Transportation and Information saw wages decline.

**Table 21: Average Weekly Wage Growth by Industry – Washington County**

In Order of 2011-2020 Total Wage Growth Largest to Smallest

Industry	Total Growth			Growth Rate		
	2018-2020	2016-2020	2011-2020	2018-2020	2016-2020	2011-2020
Unclassified	\$839	\$133	\$839		19%	
Finance and Insurance	\$273	\$528	\$671	19%	43%	62%
Utilities	\$55	\$146	\$414	4%	11%	41%
Agriculture, Forestry, Fishing and Hunting	\$265	\$354	\$402	39%	60%	75%
Public Administration	\$99	\$146	\$318	10%	15%	41%
Construction	\$108	\$101	\$318	11%	11%	43%
Professional, Scientific, and Technical Services	\$31	\$162	\$291	2%	14%	29%
Educational Services	\$99	\$136	\$270	11%	16%	39%
Administrative and Support and Waste Management and Remediation Services	\$131	\$97	\$238	20%	14%	44%
Retail Trade	\$87	\$123	\$222	14%	22%	47%
Health Care and Social Assistance	\$49	\$114	\$210	7%	19%	40%
Wholesale Trade	\$165	\$231	\$178	15%	23%	17%
Manufacturing	\$175	\$195	\$176	19%	21%	19%
Real Estate and Rental and Leasing	-\$61	\$224	\$156	-5%	23%	15%
Other Services (except Public Administration)	\$47	\$31	\$115	8%	5%	23%
Accommodation and Food Services	\$37	\$75	\$115	11%	25%	43%
Arts, Entertainment, and Recreation	\$32	\$60	\$77	11%	23%	32%
Mining, Quarrying, and Oil and Gas Extraction	\$462	\$263	\$65	32%	16%	3%
Information	\$36	\$5	-\$38	6%	1%	-6%
Transportation and Warehousing	\$67	\$115	-\$149	11%	20%	-18%
Management of Companies and Enterprises	-\$366	-\$626	-\$515	-41%	-54%	-49%
<b>Total, All Industries</b>	<b>\$83</b>	<b>\$124</b>	<b>\$170</b>	<b>9%</b>	<b>15%</b>	<b>21%</b>

Source: Texas Workforce Commission Quarterly Census of Employment and Wages (QCEW)

When examining industries by their share of the total wages paid out in the County, Finance and Insurance particularly stands out with approximately 95% growth followed by Agriculture, Forestry, Fishing and Hunting at 72%, then Accommodation and Food Services with 69% and Construction at 62%.

When examining industries by their total wages paid out in the County, Manufacturing stands out with the greatest total growth.

**Table 22: Total Wages Paid, Growth by Industry – Washington County**

In Order of 2011-2021 Total Growth Largest to Smallest

Industry	Total Growth			Growth Rate		
	2018-2021	2016-2021	2011-2021	2018-2021	2016-2021	2011-2021
Finance and Insurance	\$281,065	\$6,911,441	\$9,182,660	20%	37%	95%
Wholesale Trade	\$659,354	\$4,780,406	\$6,106,068	22%	28%	56%
Health Care and Social Assistance	\$734,061	\$2,415,491	\$6,089,692	5%	9%	31%
Manufacturing	\$9,004,935	\$10,729,189	\$6,044,845	23%	28%	18%
Retail Trade	\$2,643,840	\$2,863,368	\$5,638,351	15%	16%	46%
Educational Services	\$1,508,210	\$1,779,551	\$3,853,495	9%	10%	29%
Construction	\$1,762,139	\$1,942,686	\$3,743,464	18%	20%	62%
Accommodation and Food Services	\$434,726	\$1,410,859	\$2,574,741	7%	22%	69%
Public Administration	\$701,034	\$970,535	\$2,009,843	12%	17%	54%
Professional, Scientific, and Technical Services	\$521,850	\$1,374,176	\$1,992,387	9%	23%	51%
Administrative and Support and Waste Management and Remediation Services	\$623,273	\$1,183,931	\$1,560,762	15%	29%	61%
Agriculture, Forestry, Fishing and Hunting	\$29,342	\$217,274	\$818,761	1%	11%	72%
Utilities	\$5,239	\$174,986	\$471,008	0%	13%	52%
Other Services (except Public Administration)	\$57,165	\$211,481	\$417,296	3%	10%	26%
Real Estate and Rental and Leasing	\$59,169	\$533,504	\$385,701	-3%	25%	22%
Arts, Entertainment, and Recreation	\$90,791	\$121,192	\$189,281	14%	18%	41%
Management of Companies and Enterprises	\$82,605	\$66,400	-\$39,843	-120%	-96%	-37%
Transportation and Warehousing	\$1,086,261	\$583,549	-\$117,734	-36%	-19%	-4%
Information	\$197,203	\$511,029	-\$607,565	-25%	-66%	-44%
Mining, Quarrying, and Oil and Gas Extraction	\$11,367	\$148,499	-\$3,081,851	1%	-10%	-67%
<b>Total, All Industries</b>	<b>\$24,747,295</b>	<b>\$36,310,593</b>	<b>\$47,231,362</b>			

Source: Texas Workforce Commission Quarterly Census of Employment and Wages (QCEW)

The table below displays the percentage of wages paid for selected years by industry.

**Table 23: Total Wages Paid, Shares by Industry – Washington County**

In Order of 2021 Shares Largest to Smallest

	2021	2018	2016	2011	2021-2011 Change
Manufacturing	25%	19%	19%	25%	0%
Health Care and Social Assistance	17%	16%	16%	15%	2%
Finance and Insurance	12%	10%	8%	7%	5%
Retail Trade	12%	10%	10%	9%	6%
Educational Services	11%	10%	11%	10%	1%
Wholesale Trade	11%	8%	8%	8%	3%
Construction	6%	5%	5%	5%	1%
Accommodation and Food Services	4%	4%	3%	3%	1%
Professional, Scientific, and Technical Services	4%	3%	3%	3%	0%
Public Administration	4%	3%	3%	3%	1%
Administrative and Support and Waste Management and Remediation Services	3%	2%	2%	2%	1%
Transportation and Warehousing	2%	3%	2%	2%	0%
Real Estate and Rental and Leasing	1%	1%	1%	1%	0%
Other Services (except Public Administration)	1%	1%	1%	1%	0%
Agriculture, Forestry, Fishing and Hunting	1%	1%	1%	1%	0%
Mining, Quarrying, and Oil and Gas Extraction	1%	1%	1%	3%	-2%
Utilities	1%	1%	1%	1%	0%
Information	1%	1%	1%	1%	0%
Arts, Entertainment, and Recreation	0%	0%	0%	0%	0%
Management of Companies and Enterprises	0%	0%	0%	0%	0%

Source: Texas Workforce Commission Quarterly Census of Employment and Wages (QCEW)

Projecting average weekly wages into the future is a challenge, but it can be useful to examine scenarios based on recent trends.

The forecast below looks three, five, and ten years ahead from 2020 using the growth rates seen in each industry sector and for all industries overall from the most recent three, five, and ten-year historical periods.

Over a ten-year period, this could result in an overall average weekly wage increase of \$1,239 equivalent to the 26% overall growth seen from 2011-2020.

**Table 24: Projected Average Weekly Wage Growth by Industry – Washington County**

In Order of Forecast Growth to 2028 Largest to Smallest

Forecast Year		2022	2025	2028	Historic Growth Rates		
Forecast Growth Historical Base	2020	2018-2020	2016-2020	2011-2020	2018-2020	2016-2020	2011-2020
Finance and Insurance	\$1,748	\$2,072	\$2,505	\$2,837	19%	43%	62%
Utilities	\$1,421	\$1,478	\$1,584	\$2,005	4%	11%	41%
Mining, Quarrying, and Oil and Gas Extraction	\$1,928	\$2,536	\$2,233	\$1,995	32%	16%	3%
Professional, Scientific, and Technical Services	\$1,311	\$1,343	\$1,496	\$1,685	2%	14%	29%
Public Administration	\$1,100	\$1,209	\$1,268	\$1,547	10%	15%	41%
Construction	\$1,058	\$1,178	\$1,170	\$1,513	11%	11%	43%
Wholesale Trade	\$1,236	\$1,426	\$1,520	\$1,444	15%	23%	17%
Agriculture, Forestry, Fishing and Hunting	\$940	\$1,065	\$1,158	\$1,396	13%	23%	48%
Real Estate and Rental and Leasing	\$1,205	\$1,147	\$1,480	\$1,384	-5%	23%	15%
Educational Services	\$969	\$1,079	\$1,127	\$1,343	11%	16%	39%
Manufacturing	\$1,115	\$1,323	\$1,351	\$1,324	19%	21%	19%
Administrative and Support and Waste Management and Remediation Services	\$776	\$934	\$887	\$1,119	20%	14%	44%
Health Care and Social Assistance	\$729	\$782	\$864	\$1,024	7%	19%	40%
Retail Trade	\$690	\$790	\$840	\$1,017	14%	22%	47%
Other Services (except Public Administration)	\$624	\$675	\$657	\$765	8%	5%	23%
Transportation and Warehousing	\$700	\$774	\$838	\$577	11%	20%	-18%
Information	\$608	\$646	\$613	\$572	6%	1%	-6%
Accommodation and Food Services	\$380	\$421	\$473	\$545	11%	25%	43%
Arts, Entertainment, and Recreation	\$319	\$355	\$393	\$421	11%	23%	32%
Management of Companies and Enterprises	\$530	\$314	\$243	\$269	-41%	-54%	-49%
<b>Total, All Industries</b>	<b>\$963</b>	<b>\$1,077</b>	<b>\$1,135</b>	<b>\$1,239</b>	<b>9%</b>	<b>15%</b>	<b>26%</b>

Source: Texas Workforce Commission Quarterly Census of Employment and Wages (QCEW)

The table below shows the top ten largest industries that employ the greatest number of workers in Washington County and the 2020 average weekly wage they paid.

- The ten largest industry sectors employ 89% of the 15,059 workers in the County.
- Six of the largest industries pay greater than the 2020 average weekly wage of \$963.
- The four industries paying below the 2020 average weekly wage employ 6,382 workers, 42.4% of all workers in the County.

**Table 25: Washington County Top Ten Industries by Employment and Average Weekly Wage, 2020**

Industry	Employment	Avg. Weekly Wage	2018-2020 Job Growth
Health Care and Social Assistance	2,707	\$729	-54
Manufacturing	2,677	\$1,115	239
Retail Trade	1,984	\$690	51
Educational Services	1,365	\$969	-22
Accommodation and Food Services	1,281	\$380	-40
Wholesale Trade	1,054	\$1,236	104
Finance and Insurance	831	\$1,748	45
Construction	708	\$1,058	62
Administrative and Support and Waste Management and Remediation Services	410	\$776	-9
Public Administration	402	\$1,100	14
<b>Total/Average</b>	<b>13,419</b>	<b>\$980</b>	<b>390</b>

Source: Texas Workforce Commission Quarterly Census of Employment and Wages (QCEW)

Those working in sectors with the largest amounts of employees making at and below the average weekly county wage are in greatest need of additional housing priced no more than 30% of their income.

These sectors include:

- Health Care and Social Assistance
- Retail Trade
- Educational Services
- Accommodation and Food Services,
- Administrative and Support and Waste Management and Remediation Services

Some businesses that were interviewed for this study cited that a lack of attractive and reasonably affordable rental and for-sale housing units impacts their ability to hire and retain workers.



The highest paying industries in the County that all pay greater than the average weekly wage have grown as net employment increased significantly (470).

**Table 26: Washington County Industries Paying Greater Than Average Weekly Wage, 2020**

Industry	Employees	Avg. Weekly Wage	2018-2021 Job Growth
Mining, Quarrying, and Oil and Gas Extraction	60	\$1,928	-18
Finance and Insurance	831	\$1,748	45
Utilities	75	\$1,421	-2
Professional, Scientific, and Technical Services	345	\$1,311	23
Wholesale Trade	1,054	\$1,236	104
Real Estate and Rental and Leasing	136	\$1,205	3
Manufacturing	2,677	\$1,115	239
Public Administration	402	\$1,100	14
Construction	708	\$1,058	62
Educational Services	1,365	\$969	
<b>Total/Average</b>	<b>7,653</b>	<b>\$1,309</b>	<b>470</b>

Source: Texas Workforce Commission Quarterly Census of Employment and Wages (QCEW)

- The ten highest paying sectors employing 7,653 workers had a combined average weekly wage of \$1,309.
- This represented 51% of workers in the County and the remaining 49% of workers in the County made less than \$963 per week.

## Job Inflow and Outflow

LEHD estimates for 2018 denote 12,689 employed in Brenham.

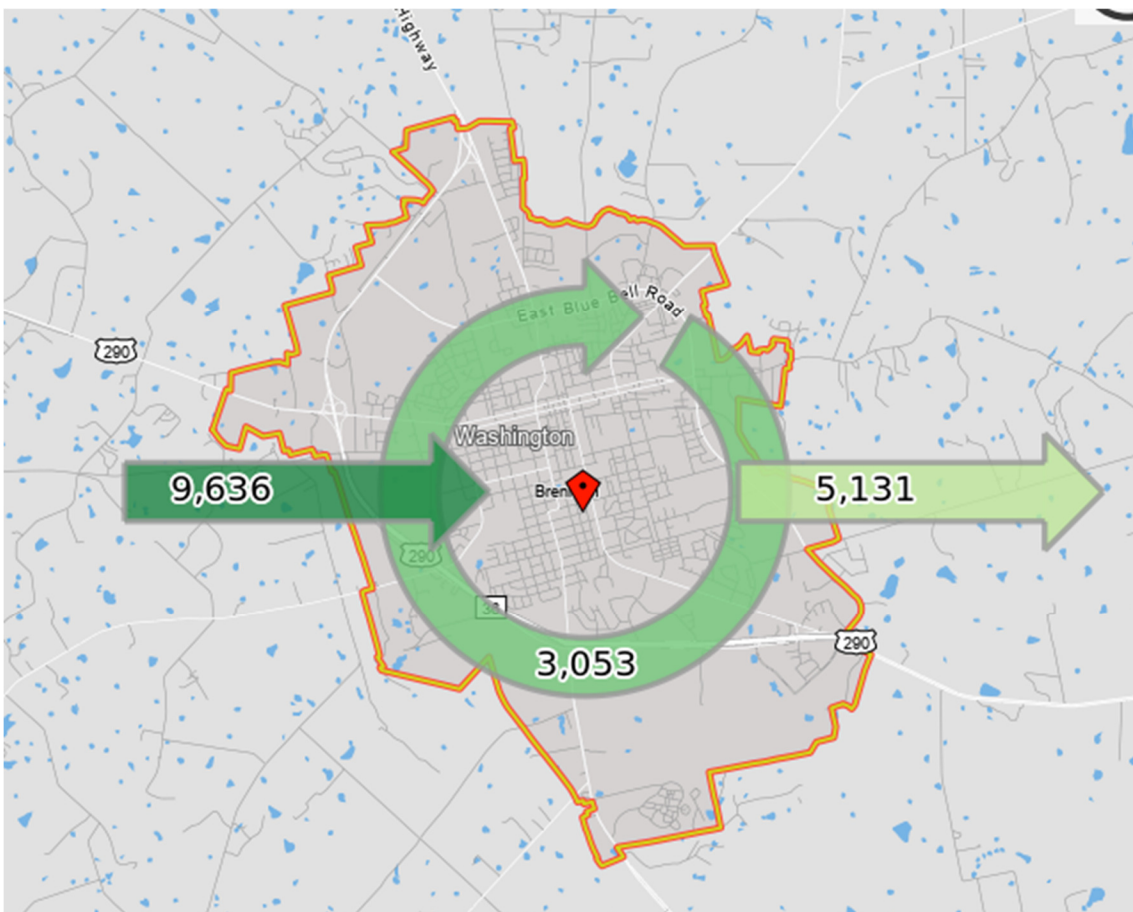
Figure 4 shows the direction in 2018 of job inflow and outflow of those employed in Brenham.

The dark green arrow indicates workers employed in Brenham living outside the city limits who commute into the City for work (9,636).

The lighter green round arrow represents those employed and living in Brenham (3,053).

The lightest green arrow shows the number of those living in Brenham yet employed outside of the City (5,131).

**Figure 27: Brenham 2018 LEHD Job Inflow/Outflow**



Source: US Census Bureau, Center for Economic Studies, Longitudinal Employer-Household Dynamics (LEHD), OnTheMap

The figure above shows further detail of the 2018 Brenham job inflow and outflow data. Figures for 2018 are the most recent year data available. Although the data is slightly dated, the share of those living and working in Brenham should be relatively unchanged.

If any change has occurred CDS believes the most likely scenario is that remote workers mostly employed in the Houston metro moved into Brenham while working remotely which increased the resident population in Brenham while overall employment has stayed stable.

According to 2018 data Brenham experiences significant worker household leakage with 76% (9,636) of the 12,689 employed in the City living outside of the City.

An estimated 55% (5,131) of residents in the City commute outside for employment.

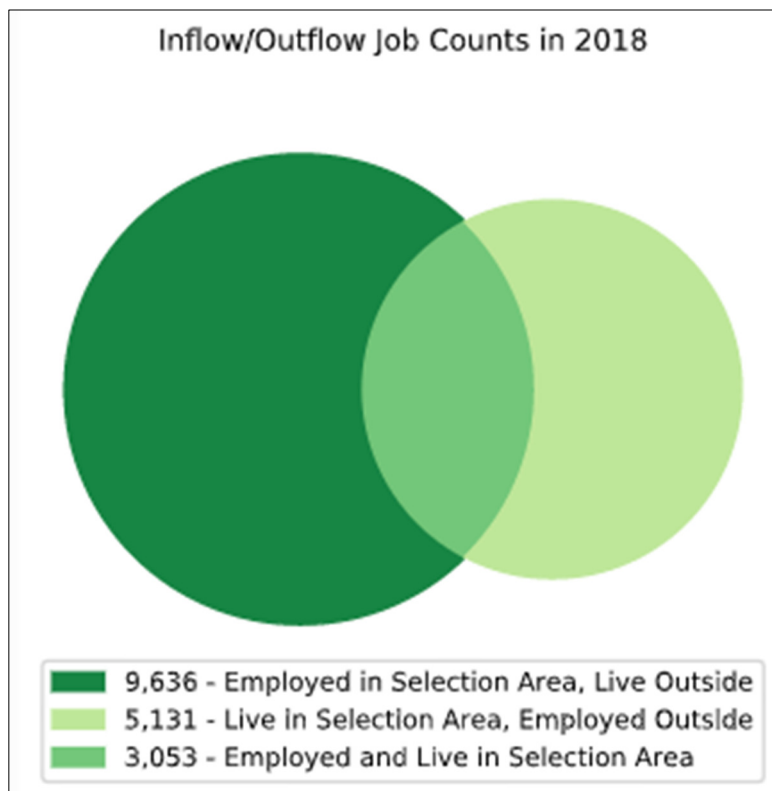
**Table 28: Brenham LEHD Inflow/Outflow Job Counts, 2018**

Inflow/Outflow Job Counts (All Jobs)	Count	%
<b>Employed in the Selection Area</b>	<b>12,689</b>	<b>100%</b>
Employed in the Selection Area but Living Outside	9,636	76%
Employed and Living in the Selection Area	3,053	24%
<b>Living in the Selection Area</b>	<b>8,184</b>	<b>100%</b>
Living in the Selection Area but Employed Outside	5,131	55%
Living and Employed in the Selection Area	3,053	45%

Source: US Census Bureau, Center for Economic Studies, Longitudinal Employer-Household Dynamics (LEHD), OnTheMap

This shows an opportunity for Brenham to improve its share of existing and future locally employed workers housed within the City.

**Figure 29: Brenham 2018 Jobs**



The table below shows the breakdown of distance travelled from home to their workplace in Brenham.

Almost half of those working in Brenham, 5,856 (46%), live 25 or more miles from their place of work in Brenham. Many experts and research agrees that the number one demand for housing is local employment. Therefore, employed persons working in Brenham yet living outside of the City present a prime opportunity to capture them as new households in Brenham. In addition, accommodating more local workers to live in the City will help decrease the leakage of their earned income, purchasing power and potential property and sales tax base to other communities, while also helping existing and new businesses retain and hire workers.

Approximately, 33% live greater than 50 miles from Brenham. It should be noted that this portion of the workforce resides well beyond Brenham's retail and services trade area, resulting in severe leakage. Additionally, those most willing to commute long distances are likely those with specialized jobs, credentials, skills, and higher earnings potential.

**Table 30: Distance – To Brenham for Work, Employed in Brenham, 2018**

Distance Home to Work	Count	%
<b>Total All Jobs</b>	<b>12,689</b>	<b>100%</b>
Less than 10 miles	4,924	39%
10 to 24 miles	1,909	15%
25 to 50 miles	1,637	13%
Greater than 50 miles	4,219	33%

Source: US Census Bureau, Center for Economic Studies, Longitudinal Employer-Household Dynamics (LEHD), OnTheMap

Table 31 below shows the top locations where Brenham workers live. In interview with local employers Houston (Cypress), Bryan/College Station, and Bellville were some of the most common places employers said their Brenham workers lived.

**Table 31: Jobs Counts by County Where Workers Live - All Jobs 2018**

	Count	Share
<b>Total, All Places</b>	<b>12,689</b>	<b>100%</b>
Brenham, TX	3,053	24%
Washington County, TX	2,669	21%
Harris County, TX	1,209	10%
Austin County, TX	671	5%
Brazos County, TX	466	4%
Montgomery County, TX	289	2%
Travis County, TX	282	2%
Waller County, TX	280	2%
Burleson County, TX	270	2%
Fort Bend County, TX	232	2%
Fayette County, TX	222	2%
All Other Locations	3,046	24%

Source: US Census Bureau, Center for Economic Studies, Longitudinal Employer-Household Dynamics (LEHD), OnTheMap

The share of residents working in Brenham yet living outside Brenham provides an opportunity to understand their housing and quality of life preferences, and then work to capture them as new residents within the city. There are some, such as those living on larger acreage lots or more amenitized, planned communities in the County or in other places who may show no indication of preferring to live in Brenham.

However, those working in Brenham yet living outside who prefer and/or benefit from living closer to their place of employment presents an opportunity to accommodate this pent-up housing demand by facilitating the supply of new housing affordable and preferable to their housing preferences.

Local blue collar employers interviewed for this study stated that most of their workers who do commute do not mind living in surrounding areas, but some manufacturing operators stated that if they had more local housing to hire and house more local workers, they would then be able to add an additional shift or product line. But with no new market rate apartments, hiring new production workers seems to be a challenge.

Health, social service and education employers stated more market rate apartment rental units are needed since their employees who live elsewhere typically end up finding employment where they live in order to eliminate the long commute.

Healthcare employers were particularly feeling the stress of high turnover due to the lack of new market rate apartments. Healthcare workers are vital not only for the health and well-being of local citizens of Brenham, but they also provide care for a significant share of retired and over-65 populations living throughout Brenham's retail and services trade area. The availability of high-quality nearby healthcare is a valuable amenity to senior citizens, retirees and those with critical healthcare demands. Increased demand on healthcare employees due to COVID has created even more of a demand for healthcare workers to live closer to their place of employment.

Employers shared that hourly workers as well as moderate and higher paid workers have found housing outside of Brenham. Younger, recent college graduates and other professionals tend to prefer housing in places like Bryan/College Station or Cypress where new market rate apartments are more plentiful.

The occurrence of Brenham workers living outside the City creates property and sales tax base leakage and also potentially lessens the civic impact that local workers in occupations such as engineers, finance and banking, healthcare, teachers, police, fire, and EMS might have in the community.

## **Brenham Economic and Workforce Findings**

In 2021, data from QCEW for Washington County demonstrated 15,059 workers, 996 establishments, a \$963 average weekly wage.

According to information provided by the Brenham Economic Development Corporation and the LEHD information above there was an estimated 12,000 jobs in Brenham in 2018.

Using this data Brenham would possess an 80% share of all employment in the County.

The largest employers, along with a growing small business community, in Brenham provide a stable and resilient employment base with a 2021 median household income of \$53,075 based on PCensus 2021 and \$45,197 according to 2019 ACS data.

The unemployment rate in Washington County as of 2020 was 5.6%. Unemployment in the County was at its lowest 10 year point in 2018 at 3.4%. Average employment increased from 2011 to 2021 by a total decrease 414 new jobs.

As previously demonstrated, 2018 data from LEHD showed 76% (9,636) of 12,000 Brenham workers resided outside of the City which was a high rate.

Many interviews with employers in the City shared that workers of all pay grades in many instances have secured housing outside of Brenham in areas previously mentioned.

This was mostly the result of the lack of new market rate apartment unit creation and limited supply and quality of existing market rate housing in the City.

The City of Brenham has local employers that appear to be primed for local expansion. But, without new market rate apartment units as well as more single-family for-sale and rental options Brenham businesses cannot hire as many new employees as they need in the time and ease that allows them to continue to grow in step with increased local and outside demand for their products and services.

The key is to lure local worker households to Brenham with more and newer housing offerings and less driving for the commute.

## Housing Characteristics

The following three tables present information regarding the housing characteristics and trends in Brenham and Washington County for comparison purposes.

The table below shows the type and number of housing units in Brenham and Washington County.

**Table 32: Housing Types, 2021**

Type of Structure	Brenham		Washington County	
	Count	%	Count	%
1 Unit Attached	125	2%	166	1%
1 Unit Detached	5,086	74%	12,408	75%
2 Units	337	5%	393	2%
3 or 4 Units	292	4%	336	2%
5 to 19 Units	250	4%	298	2%
20 to 49 Units	300	4%	317	2%
50 or More Units	244	4%	253	2%
Mobile Home or Trailer	250	4%	2,404	14%
Boat, RV, Van, etc.	2	0%	41	0%
<b>Total Units</b>	<b>6,886</b>		<b>16,616</b>	
Owner Occupied Units	3,710	59%	10,152	72%
Renter Occupied Units	2,541	41%	3,916	28%
<b>Total Occupied Units</b>	<b>6,251</b>	<b>90%</b>	<b>14,068</b>	<b>85%</b>
<b>Unoccupied Units</b>	<b>635</b>	<b>10%</b>	<b>2,548</b>	<b>15%</b>

Source: PCensus 2021

- In Brenham 59% of occupied housing units were estimated to be owner-occupied (3,710 units) with the remaining 41% (2,541 units) renters.
- Approximately 74% (5,086) of Brenham’s housing units were single-family detached.
- Duplex, triplex and four-plex units accounted for 9% (629) of all housing units in the City, while mobile homes accounted for 3.6% (250) and attached single-family accounted for 2% (125).
- Small scale multi-family apartments (5 to 19 units) appear to play a marginal role in the rental housing market in Brenham, making up just over 4% (250) of all housing units in the City.

This information is derived from PCensus 2021 which bases current estimates on past trends from the U.S. Census Bureau and the American Community Survey, and in some cases, is self-reported data.

While this can generate minor anomalies (such as are present in the data on age of housing stock or housing values), the information presented here still provides a valuable overview of the housing stock in the City. One important note to make is that the total housing unit number used in this section is an estimate. In the following section ACS 2019 data differs from the PCensus 2021 data shown in this table.

The table below contains the 2021 estimate of the age of the existing housing stock in Brenham and Washington County.

An estimated 6,886 housing units are located in Brenham, representing about a 41% share of the 16,616 housing units in the County. This places Brenham as the prime housing location for the County.

**Table 33: Age of Existing Housing Stock, 2021**

	Brenham		Washington County	
	Count	%	Count	%
<b>Total Housing Units</b>	<b>6,886</b>	<b>100%</b>	<b>16,616</b>	<b>100%</b>
Built 2014 or Later	478	7%	1,435	9%
Built 2010 to 2013	218	3%	619	4%
Built 2000 to 2009	916	13%	2,787	17%
Built 1990 to 1999	1,035	15%	2,444	15%
Built 1980 to 1989	1,012	15%	2,543	15%
Built 1970 to 1979	1,231	18%	2,427	15%
Built 1960 to 1969	703	10%	1,413	9%
Built 1950 to 1959	449	7%	862	5%
Built 1940 to 1949	364	5%	781	5%
Built 1939 or Earlier	480	7%	1,305	8%
<b>Dominant Year Structure Built</b>				
	<b>1970 to 1979</b>		<b>2000 to 2009</b>	

Sources: PCensus 2021

- Both Study Areas feature existing home stocks predominately built from 1970 to 1999.
- Existing older homes that can be maintained and revitalized will create a positive impact to providing adequate housing to the community.
- Approximately 77% of Brenham housing units were built before 2000.



## Housing Value Trends

The table below contains data not based on actual transaction or appraisal data but based on owners' opinion of housing unit value. In some cases, owners may tend to over or under-value homes for a variety of reasons. Nevertheless, the data overall can provide some estimate of the value of owner-occupied units.

- An estimated 1,207 (33%) owner-occupied homes in Brenham were valued below \$150,000. This stock of homes represents in some cases blighted or perhaps unlivable structures that could be the focus of a blight abatement and neighborhood revitalization programs.
- Mapping and targeting neighborhoods with lower valued units could provide increased opportunities for new infill housing, infrastructure and amenities investments in core neighborhoods, as well as housing renovation or rebuilding on existing lots and infrastructure which can play a vital role in providing more affordably priced for-sale and rental units.

**Table 34: Housing Value, 2021**

Housing Value Range	Brenham		Washington County	
	Count	%	Count	%
<b>2021 Est. Owner Occupied Housing Units by Value</b>	<b>3,710</b>	<b>100%</b>	<b>10,152</b>	<b>100%</b>
Value Less than \$20,000	146	4%	567	6%
Value \$20,000 to \$39,999	109	3%	360	4%
Value \$40,000 to \$59,999	26	1%	121	1%
Value \$60,000 to \$79,999	124	3%	466	5%
Value \$80,000 to \$99,999	213	6%	488	5%
Value \$100,000 to \$149,999	589	16%	1,468	14%
Value \$150,000 to \$199,999	713	19%	1,370	13%
Value \$200,000 to \$299,999	912	25%	2,195	22%
Value \$300,000 to \$399,999	402	11%	1,212	12%
Value \$400,000 to \$499,999	255	7%	836	8%
Value \$500,000 to \$749,999	112	3%	463	5%
Value \$750,000 to \$999,999	52	1%	271	3%
Value \$1,000,000 to \$1,499,999	35	1%	184	2%
Value \$1,500,000 to \$1,999,999	16	0%	93	1%
Value \$2,000,000 or more	6	0%	58	1%
<b>2021 Est. Median Owner-Occupied Housing Unit Value</b>	<b>\$195,442</b>	<b>-</b>	<b>\$210,752</b>	<b>-</b>

Source: PCensus 2021

- The greatest number of owner-occupied housing units by value were within the \$200,000 to \$249,999 cohort which accounts for nearly 25% (912) of all owner-occupied housing units in Brenham.
- Approximately 20% (713) of owner-occupied units in the City are valued from \$150,000 to \$199,000. Houses valued from \$300,000 and up amount to 878 units and 25% of total housing.
- The median value of owner-occupied homes in Brenham was \$195,442.

## Overall Household Income Profiles

According to 2019 ACS estimates there were 12,625 households in Washington County and 5,774 households in Brenham. Approximately 46% of Washington County households were located within Brenham.

Median household income was greater in the County than City by \$9,774.

Brenham median household income was \$45,197 and Washington County was \$54,971.

Median household income for owners was greater than renters for the City and County.

In Brenham and Washington County owner households outnumbered renter households.

Brenham’s households were 62% (3,553) owner-occupied and 38% (2,221) renter-occupied, per the ACS. *(note: this is slightly different from the 59% / 41% split estimated in Table 32, owing to a different data source.)*

ACS 2019 data shown here differs from the PCensus 2021 data on page 48.

**Table 35: 2019 Household Income by Tenure**

Households	Brenham		Washington County	
	Count	Share	Count	Share
<b>Total:</b>	<b>5,774</b>	<b>100%</b>	<b>12,625</b>	<b>100%</b>
<b>Total Median Income</b>	<b>\$45,197</b>	-	<b>\$54,971</b>	-
<b>Owner occupied:</b>	3,553	62%	9,358	74%
Less than \$5,000	105	2%	266	2%
\$5,000 to \$9,999	45	1%	131	1%
\$10,000 to \$14,999	147	3%	289	2%
\$15,000 to \$19,999	121	2%	215	2%
\$20,000 to \$24,999	197	3%	347	3%
\$25,000 to \$34,999	381	7%	1,113	9%
\$35,000 to \$49,999	512	9%	1,262	10%
\$50,000 to \$74,999	626	11%	1,729	14%
\$75,000 to \$99,999	525	9%	1,233	10%
\$100,000 to \$149,999	554	10%	1,495	12%
\$150,000 or more	340	6%	1,278	10%
<b>Owner Median Income</b>	<b>\$60,347</b>	-	<b>\$67,149</b>	-
<b>Renter occupied:</b>	2,221	38%	3,267	26%
Less than \$5,000	96	2%	149	1%
\$5,000 to \$9,999	94	2%	187	1%
\$10,000 to \$14,999	247	4%	254	2%
\$15,000 to \$19,999	208	4%	256	2%
\$20,000 to \$24,999	553	10%	560	4%
\$25,000 to \$34,999	151	3%	327	3%
\$35,000 to \$49,999	187	3%	363	3%
\$50,000 to \$74,999	381	7%	650	5%
\$75,000 to \$99,999	99	2%	146	1%
\$100,000 to \$149,999	150	3%	254	2%
\$150,000 or more	55	1%	121	1%
<b>Renter Median Income</b>	<b>\$23,750</b>	-	<b>\$32,739</b>	-

Source: U.S. Census Bureau, 2019 American Community Survey

The greatest number of households in Brenham by age of householder was 65 years and older with 2,013 (35%) of all households followed by 45-64 years with 1,775 (31%) of all households.

As previously noted, Brenham had a 46% (5,774) share of the 12,625 total households in Washington County.

Brenham had 2% of households in Washington County under 25 years, 14% of households 25-44 years, 14% of households 45-64 years and 16% of households 65 years and older.

In Brenham, the largest cohort of households by age who made less than \$25,000 were 65 years and older with 798 households followed by 25-44 years with 484 households.

**Table 36: 2019 Household Income by Age of Householder**

Households	Brenham		Washington County	
	Count	Share	Count	Share
<b>Total Households</b>	<b>5,774</b>	<b>100%</b>	<b>12,625</b>	<b>100%</b>
<b>Median Income</b>	<b>\$45,197</b>	<b>-</b>	<b>\$54,971</b>	<b>-</b>
<b>Under 25 Years</b>	<b>229</b>	<b>4%</b>	<b>329</b>	<b>3%</b>
Less than \$25,000	119	2%	143	1%
\$25,000 to \$49,999	33	1%	49	0%
\$50,000 to \$74,999	8	0%	22	0%
\$75,000 to \$99,999	59	1%	59	0%
\$100,000 to \$149,999	0	0%	46	0%
\$150,000 or more	10	0%	10	0%
<b>25-44 Years</b>	<b>1,757</b>	<b>30%</b>	<b>3,118</b>	<b>25%</b>
Less than \$25,000	484	8%	536	4%
\$25,000 to \$49,999	314	5%	660	5%
\$50,000 to \$74,999	346	6%	677	5%
\$75,000 to \$99,999	240	4%	401	3%
\$100,000 to \$149,999	294	5%	554	4%
\$150,000 or more	79	1%	290	2%
<b>45-64 Years</b>	<b>1,775</b>	<b>31%</b>	<b>4,645</b>	<b>37%</b>
Less than \$25,000	412	7%	727	6%
\$25,000 to \$49,999	445	8%	1089	9%
\$50,000 to \$74,999	370	6%	937	7%
\$75,000 to \$99,999	165	3%	497	4%
\$100,000 to \$149,999	212	4%	612	5%
\$150,000 or more	171	3%	783	6%
<b>65 Years and Older</b>	<b>2,013</b>	<b>35%</b>	<b>4,533</b>	<b>36%</b>
Less than \$25,000	798	14%	1248	10%
\$25,000 to \$49,999	439	8%	1267	10%
\$50,000 to \$74,999	283	5%	743	6%
\$75,000 to \$99,999	160	3%	422	3%
\$100,000 to \$149,999	198	3%	537	4%
\$150,000 or more	135	2%	316	3%

Source: U.S. Census Bureau, 2019 American Community Survey

Households under 65 represented 65% of all households in Brenham.

Approximately 35% of all Brenham households were 65 and older.

**Table 37: 2019 Household Income by Household Type, Under 65 and 65 and Older**

Households	Brenham		Washington County	
	Count	Share	Count	Share
<b>Under 65 Years</b>	<b>3,761</b>	<b>65%</b>	<b>8,092</b>	<b>64%</b>
Less than \$25,000	1,015	18%	1,406	11%
\$25,000 to \$49,999	792	14%	1,798	14%
\$50,000 to \$74,999	724	13%	1,636	13%
\$75,000 to \$99,999	464	8%	957	8%
\$100,000 to \$149,999	506	9%	1,212	10%
\$150,000 or more	260	5%	1,083	9%
<b>65 and Older Years</b>	<b>2,013</b>	<b>35%</b>	<b>4,533</b>	<b>36%</b>
Less than \$25,000	798	14%	1,248	10%
\$25,000 to \$49,999	439	8%	1,267	10%
\$50,000 to \$74,999	283	5%	743	6%
\$75,000 to \$99,999	160	3%	422	3%
\$100,000 to \$149,999	198	3%	537	4%
\$150,000 or more	135	2%	316	3%

Source: U.S. Census Bureau, 2019 American Community Survey

### Housing Cost-Burdened Households

Housing cost burdened households are defined as paying greater than 30% of household income toward housing costs alone. As one would expect, lower-income owner occupied households had the greatest shares of households with housing cost burdens.

Entry-level first-time home buyers in Brenham tend to be concentrated within the \$40,000 to \$50,000 and less household income ranges. In Brenham 1,450 owner-occupied households made less than \$50,000 with 684 of those paying 30% or more on housing.

**Table 38: 2019 Housing Costs as a Percentage of Household Income – Owner-Occupied Housing by Income**

Owner-Occupied	Brenham			Washington County		
	Count	Share of Total	Share of Owner-Occupied	Count	Share of Total	Share of Owner-Occupied
<b>Total Housing Units</b>	<b>5,774</b>	<b>100%</b>	<b>-</b>	<b>12,625</b>	<b>100%</b>	<b>-</b>
<b>Owner-Occupied Units</b>	<b>3,553</b>	<b>62%</b>	<b>100%</b>	<b>9,358</b>	<b>74%</b>	<b>100%</b>
<b>Less than \$20,000</b>	<b>360</b>	<b>6%</b>	<b>10%</b>	<b>827</b>	<b>7%</b>	<b>9%</b>
Less than 20 percent	40	1%	1%	228	2%	2%
20 to 29 percent	15	0%	0%	15	0%	0%
30 percent or more	305	5%	9%	584	5%	6%
<b>\$20,000 to \$34,999</b>	<b>578</b>	<b>10%</b>	<b>16%</b>	<b>1,460</b>	<b>12%</b>	<b>16%</b>
Less than 20 percent	210	4%	6%	499	4%	5%
20 to 29 percent	120	2%	3%	411	3%	4%
30 percent or more	248	4%	7%	550	4%	6%
<b>\$35,000 to \$49,999</b>	<b>512</b>	<b>9%</b>	<b>14%</b>	<b>1,262</b>	<b>10%</b>	<b>13%</b>
Less than 20 percent	287	5%	8%	643	5%	7%
20 to 29 percent	94	2%	3%	312	2%	3%
30 percent or more	131	2%	4%	307	2%	3%
<b>\$50,000 to \$74,999</b>	<b>626</b>	<b>11%</b>	<b>18%</b>	<b>1,729</b>	<b>14%</b>	<b>18%</b>
Less than 20 percent	312	5%	9%	1,041	8%	11%
20 to 29 percent	276	5%	8%	511	4%	5%
30 percent or more	38	1%	1%	177	1%	2%
<b>\$75,000 or more</b>	<b>1,419</b>	<b>25%</b>	<b>40%</b>	<b>4,006</b>	<b>32%</b>	<b>43%</b>
Less than 20 percent	1,176	20%	33%	3,412	27%	36%
20 to 29 percent	204	4%	6%	448	4%	5%
30 percent or more	39	1%	1%	146	1%	2%
Zero or negative income	58	1%	2%	74	1%	1%

Source: U.S. Census Bureau, 2019 American Community Survey

Owners making \$50,000 and less represented 25% of all households, and 41% of all owners.

The 684 owners making \$50,000 that paid 30% or more on housing represented 12% of all households and 19% of all owners.

Of the 684 cost burdened owners, 553 made less than \$35,000 which represented 10% of all households and 16% of all owners. As with homeowners, low income renters tend to be considerably more cost-burdened than higher-income renters. In Brenham renter housing cost burden is most pronounced

**Table 39: 2019 Housing Costs as a Percentage Of Household Income – Renter-Occupied Housing by Income**

Renter-Occupied	Brenham			Washington County		
	Count	Share of Total	Share of Renter-Occupied	Count	Share of Total	Share of Renter-Occupied
<b>Total Housing Units</b>	<b>5,774</b>	<b>100%</b>	<b>-</b>	<b>12,625</b>	<b>100%</b>	<b>-</b>
<b>Renter-Occupied Units</b>	<b>2,221</b>	<b>38%</b>	<b>100%</b>	<b>3,267</b>	<b>26%</b>	<b>100%</b>
<b>Less than \$20,000</b>	<b>568</b>	<b>10%</b>	<b>26%</b>	<b>690</b>	<b>5%</b>	<b>21%</b>
Less than 20 percent	55	1%	2%	55	0%	2%
20 to 29 percent	36	1%	2%	46	0%	1%
30 percent or more	477	8%	21%	589	5%	18%
<b>\$20,000 to \$34,999</b>	<b>692</b>	<b>12%</b>	<b>31%</b>	<b>875</b>	<b>7%</b>	<b>27%</b>
Less than 20 percent	8	0%	0%	65	1%	2%
20 to 29 percent	118	2%	5%	177	1%	5%
30 percent or more	566	10%	25%	633	5%	19%
<b>\$35,000 to \$49,999</b>	<b>187</b>	<b>3%</b>	<b>8%</b>	<b>286</b>	<b>2%</b>	<b>9%</b>
Less than 20 percent	67	1%	3%	73	1%	2%
20 to 29 percent	49	1%	2%	74	1%	2%
30 percent or more	71	1%	3%	139	1%	4%
<b>\$50,000 to \$74,999</b>	<b>325</b>	<b>6%</b>	<b>15%</b>	<b>503</b>	<b>4%</b>	<b>15%</b>
Less than 20 percent	196	3%	9%	305	2%	9%
20 to 29 percent	129	2%	6%	185	1%	6%
30 percent or more	0	0%	0%	13	0%	0%
<b>\$75,000 or more</b>	<b>278</b>	<b>5%</b>	<b>13%</b>	<b>362</b>	<b>3%</b>	<b>11%</b>
Less than 20 percent	266	5%	12%	336	3%	10%
20 to 29 percent	12	0%	1%	26	0%	1%
30 percent or more	0	0%	0%	0	0%	0%
Zero or negative income	67	1%	3%	67	1%	2%
No cash rent	104	2%	5%	484	4%	15%

Source: U.S. Census Bureau, 2019 American Community Survey

for renters at the two lowest income brackets (less than \$20,000 and \$20,000 to \$34,999). There were 1,447 renter households that made \$50,000 or less. This represented a share of 25% of all households and 65% of all renter households. Of those renter households making less than \$50,000, 1,114 of them paid 30% or more on housing which represented 19% of all households and 50% of all renters.

Nearly all of Brenham’s housing cost burdened renters were in the less than \$20,000 and \$20,000 to \$34,999 income ranges. Overall there were 1,875 cost burdened households which represented 32% of all households in Brenham. There were 1,114 cost burdened renters and 761 cost burdened owners.

For renters housing cost burden was most prevalent in 35 to 64 aged householders. Housing cost burden for owners were mainly in the 65 and over and 35 to 64 cohorts.

Out of approximately 5,774 total households, 2,221 were renters and 3,553 were owners. There was an estimated 1,798 total households experiencing housing cost burden in 2019 in Brenham. Of those, 1,114 were renters and 684 were owners.

Out of 1,114 total cost burdened renters in Brenham, 94% (1,043) paid at least 30% of their income in rent and made \$34,999 or less.

Based on the Affordable Rent Calculation a summary of the total cost-burdened renter households as of 2019 within household income brackets making \$49,999 and below and the maximum rent they should pay to avoid being cost-burdened, is as follows:

**Table 40: 2019 Estimated Brenham Affordable Rental Housing Need by Income Range, 2019**

Income Range	# Cost-Burdened Households	Monthly Rent Range Needed
Less than \$20,000	477	Under \$500
\$20,000 to \$34,999	566	\$500 to \$875
\$35,000 to \$49,999	71	\$875 to \$1,250
<b>Total</b>	<b>1,114</b>	-

Source: US Census Bureau American Community Survey 2019 1-Year Estimate

Householders aged 34 to 64 made up the largest age cohort with 2,680 households. Approximately 40% were renters and 60% were owners.

**Table 41: 2019 Brenham Housing Costs As A Percentage of Household Income by Age**

Brenham	Renter-Occupied		Owner-Occupied	
	Count	Share	Count	Share
<b>Total</b>	<b>2,221</b>	<b>38%</b>	<b>3,553</b>	<b>62%</b>
<b>Householder 15 to 24 years</b>	<b>174</b>	<b>3%</b>	<b>55</b>	<b>1%</b>
Less than 20.0 percent	22	0%	47	1%
20.0 to 24.9 percent	0	0%	8	0%
25.0 to 29.9 percent	10	0%	0	0%
30.0 to 34.9 percent	0	0%	0	0%
35.0 percent or more	142	2%	0	0%
Not computed	0	0%	0	0%
<b>Householder 25 to 34 years</b>	<b>502</b>	<b>9%</b>	<b>350</b>	<b>6%</b>
Less than 20.0 percent	200	3%	151	3%
20.0 to 24.9 percent	60	1%	74	1%
25.0 to 29.9 percent	21	0%	17	0%
30.0 to 34.9 percent	12	0%	39	1%
35.0 percent or more	209	4%	69	1%
Not computed	0	0%	0	0%
<b>Householder 35 to 64 years</b>	<b>1,073</b>	<b>19%</b>	<b>1,607</b>	<b>28%</b>
Less than 20.0 percent	319	6%	909	16%
20.0 to 24.9 percent	34	1%	182	3%
25.0 to 29.9 percent	81	1%	195	3%
30.0 to 34.9 percent	0	0%	60	1%
35.0 percent or more	496	9%	261	5%
Not computed	143	2%	0	0%
<b>Householder 65 years and over</b>	<b>472</b>	<b>8%</b>	<b>1,541</b>	<b>27%</b>
Less than 20.0 percent	51	1%	918	16%
20.0 to 24.9 percent	103	2%	129	2%
25.0 to 29.9 percent	35	1%	104	2%
30.0 to 34.9 percent	17	0%	64	1%
35.0 percent or more	238	4%	268	5%
Not computed	28	0%	58	1%

Source: U.S. Census Bureau, 2019 American Community Survey



Overall householders younger than 65 made up 65% (3,761) of all households while householders 65 and older made up 35% (2,013) of all households in Brenham.

Just more than 75% of 65 and older households were owners and only 24% of those 65 and older were renters.

There were 1,288 cost burdened householders under 65. Of those, 859 were renters and 429 were owners.

There were 587 cost burdened householders 65 and older. Of those 255 were renters and 332 were owners.

The lowest rates of housing cost burden can be found in the renter-occupied 65 years and over households, which made up 4% (255) of all Brenham households.

**Table 42: 2019 Housing Costs As A Percentage of Household Income  
– Only by Under 65 and 65 and Older**

Brenham	Renter-Occupied		Owner-Occupied	
	Count	Share	Count	Share
<b>Total</b>	<b>2,221</b>	<b>38%</b>	<b>3,553</b>	<b>62%</b>
<b>Householder 64 years and Younger</b>	<b>1,749</b>	<b>30%</b>	<b>2,012</b>	<b>35%</b>
Less than 20.0 percent	541	9%	1,107	19%
20.0 to 24.9 percent	94	2%	264	5%
25.0 to 29.9 percent	112	2%	212	4%
30.0 to 34.9 percent	12	0%	99	2%
35.0 percent or more	847	15%	330	6%
Not computed	143	2%	0	0%
<b>Householder 65 years and over</b>	<b>472</b>	<b>8%</b>	<b>1,541</b>	<b>27%</b>
Less than 20.0 percent	51	1%	918	16%
20.0 to 24.9 percent	103	2%	129	2%
25.0 to 29.9 percent	35	1%	104	2%
30.0 to 34.9 percent	17	0%	64	1%
35.0 percent or more	238	4%	268	5%
Not computed	28	0%	58	1%

Source: U.S. Census Bureau, 2019 American Community Survey

**Owners**

In Brenham 46% (1,623) of owner-occupied households had a mortgage and 54% (1,930) did not have a mortgage.

About 13% (446) of homeowners with a mortgage in Brenham and 9% (315) without a mortgage were housing cost burdened.

Typically shares of housing cost burden occur at lower rates for households without a mortgage as what is typically the largest cost for owned housing is no longer a concern.

Approximately 18% (629) of homeowners with a mortgage paid less than 20% of their income in housing costs and 39% (1,396) without a mortgage paid less than 20%.

This data may imply that longtime residents of the City may tend to have

been able to pay off their home and enjoy a comfortable level of affordability and may no longer feel pressure to economize or ration their consumption of housing as their household circumstances evolve (children leave the home, death of a spouse, etc.). Meanwhile, owners with a mortgage, presumably those that are more recent owners, could be competing for the very same housing stock and may consequently be facing high margins of income dedicated to housing cost than longtime owners which may lend to the increasing price of new homes in Brenham.

**Table 43: 2019 Monthly Owner Costs as a Percentage Of Household Income**

	Brenham		Washington County	
	Count	Share	Count	Share
<b>Total Owner-Occupied</b>	<b>3,553</b>	<b>100%</b>	<b>9,358</b>	<b>100%</b>
<b>Housing units with a mortgage</b>	<b>1,623</b>	<b>46%</b>	<b>3,770</b>	<b>40%</b>
Less than 10.0 percent	158	4%	360	4%
10.0 to 14.9 percent	243	7%	729	8%
15.0 to 19.9 percent	228	6%	580	6%
20.0 to 24.9 percent	327	9%	625	7%
25.0 to 29.9 percent	183	5%	447	5%
30.0 to 34.9 percent	119	3%	319	3%
35.0 to 39.9 percent	24	1%	87	1%
40.0 to 49.9 percent	182	5%	266	3%
50.0 percent or more	121	3%	319	3%
Not computed	38	1%	38	0%
<b>30.0 percent or more</b>	<b>446</b>	<b>13%</b>	<b>991</b>	<b>11%</b>
<b>Housing units without a mortgage</b>	<b>1,930</b>	<b>54%</b>	<b>5,588</b>	<b>60%</b>
Less than 10.0 percent	812	23%	2,459	26%
10.0 to 14.9 percent	373	10%	1,071	11%
15.0 to 19.9 percent	211	6%	624	7%
20.0 to 24.9 percent	66	2%	450	5%
25.0 to 29.9 percent	133	4%	175	2%
30.0 to 34.9 percent	44	1%	124	1%
35.0 to 39.9 percent	14	0%	168	2%
40.0 to 49.9 percent	63	2%	92	1%
50.0 percent or more	194	5%	389	4%
Not computed	20	1%	36	0%
<b>30.0 percent or more</b>	<b>315</b>	<b>9%</b>	<b>773</b>	<b>8%</b>

Source: U.S. Census Bureau, 2019 American Community Survey

As one would expect, the share of homeowners paying 30% or more of income for housing falls as household incomes increase.

As previously stated, a total of 761 (21%) out of all 3,553 owner households were housing cost burdened in Brenham.

Of the 1,508 (42%) owner households in income ranges less than \$50,000, 684 households (20%) were housing cost burdened.

The share of homeowners who paid 30% or greater of their income on housing was concentrated heavily to 35 to 64 years and 65 years and over householder groups.

The estimates show that only 12% (405) of owner-occupied householders were under 35.

This shows that for the two youngest age groups for-sale housing appears difficult to attain.

**Table 44: 2019 Monthly Owner Costs Greater Than 30 Percent of Household Income by Income**

Owner-Occupied	Brenham	
	Count	Share
<b>Total</b>	<b>3,553</b>	<b>100%</b>
<b>Total In Income Range</b>	<b>3,553</b>	<b>100%</b>
Less than \$10,000	150	4%
\$10,000 to \$19,999	268	8%
\$20,000 to \$34,999	578	16%
\$35,000 to \$49,999	512	14%
\$50,000 to \$74,999	626	18%
\$75,000 to \$99,999	525	15%
\$100,000 or more	894	25%
<b>30% or more of Income</b>	<b>761</b>	<b>21%</b>
Less than \$10,000	92	3%
\$10,000 to \$19,999	213	6%
\$20,000 to \$34,999	248	7%
\$35,000 to \$49,999	131	4%
\$50,000 to \$74,999	38	1%
\$75,000 to \$99,999	39	1%
\$100,000 or more	0	0%

Source: U.S. Census Bureau, 2019 American Community Survey

**Table 45: 2019 Monthly Owner Costs Greater Than 30% Percent of Household Income by Age**

Owner-Occupied	Brenham	
	Count	Share
<b>Total</b>	<b>3,553</b>	<b>100%</b>
<b>Total In Age Range</b>	<b>3,553</b>	<b>100%</b>
Householder 15 to 24 years	55	2%
Householder 25 to 34 years	350	10%
Householder 35 to 64 years	1,607	45%
Householder 65 years and over	1,541	43%
<b>30% or more of Income</b>	<b>761</b>	<b>21%</b>
Householder 15 to 24 years	0	0%
Householder 25 to 34 years	108	2%
Householder 35 to 64 years	321	6%
Householder 65 years and over	332	6%

Source: U.S. Census Bureau, 2019 American Community Survey

This may be due to lack of supply of acceptable home quality commensurate with price, ability to qualify for home financing, employment and wage gaps or lack of attractiveness or opportunities for homeownership enticing to these ages.

**Census data utilized here and throughout this report is now several years old and it must be understood that housing cost burden and demand for affordable housing is likely much greater than shown in this report.**

## Renters

In Brenham renters paid 30% and greater of their income on housing costs at almost two and a half times the rate of owners.

Out of 2,221 renters in Brenham, approximately 50% (1,114) of renter households were housing cost burdened.

About 30% (672) of renter households spent 50% or more of their income on housing, something only 9% (315) of homeowners did.

Further investigation into which rental units and properties in Brenham could be contributing to the share of renters paying 50% or more of their income on rent may lead to suggestions regarding the mitigation of severely cost burdened rental units.

These could be blighted, inefficient single-family or multifamily properties that may also be charging more than their true value given their condition due to a lack of new or recent market rate rental units.

The median gross rent as a share of income for Brenham was 36.2%.

**Table 46: 2019 Gross Rent as a Percentage Of Household Income**

Renter-Occupied	Brenham		Washington County	
	Count	Share	Count	Share
<b>Total</b>	2,221	100%	3,267	100%
Less than 10.0 percent	58	3%	121	4%
10.0 to 14.9 percent	204	9%	278	9%
15.0 to 19.9 percent	330	15%	435	13%
20.0 to 24.9 percent	197	9%	236	7%
25.0 to 29.9 percent	147	7%	272	8%
30.0 to 34.9 percent	29	1%	56	2%
35.0 to 39.9 percent	253	11%	255	8%
40.0 to 49.9 percent	160	7%	263	8%
50.0 percent or more	672	30%	800	24%
Not computed	171	8%	551	17%
<b>30.0 percent or more</b>	<b>1,114</b>	<b>50%</b>	<b>1,374</b>	<b>42%</b>
<b>Median gross rent as a % of household income</b>	<b>36.2%</b>		<b>31.4%</b>	

Source: U.S. Census Bureau, 2019 American Community Survey

The share of renters in Brenham paying 30% or greater of their income on housing costs was most prevalent in 35 to 64 years.

About half of the 1,073 renters aged 35 to 64 were housing cost burdened.

Much like with homeowners, as incomes rise the share of renters paying 30% or more of their income on housing decreased.

Housing cost burden was primarily focused in renter households with incomes less than \$50,000.

In fact, according to the data no renter households in Brenham that made \$50,000 or more were housing cost burdened.

**Table 47: 2019 Monthly Renter Costs Greater Than 30% Percent of Household Income by Age**

Renter-Occupied	Brenham	
	Count	Share
<b>Total</b>	<b>2,221</b>	<b>100%</b>
<b>Total In Age Range</b>	<b>2,221</b>	<b>100%</b>
Householder 15 to 24 years	174	8%
Householder 25 to 34 years	502	23%
Householder 35 to 64 years	1,073	48%
Householder 65 years and over	472	21%
<b>30% or more of Income</b>	<b>1,114</b>	<b>50%</b>
Householder 15 to 24 years	142	6%
Householder 25 to 34 years	221	10%
Householder 35 to 64 years	496	22%
Householder 65 years and over	255	11%

Source: U.S. Census Bureau, 2019 American Community Survey

**Table 48: 2019 Monthly Renter Costs Greater Than 30% Percent of Household Income by Income**

Renter-Occupied	Brenham	
	County	Share
<b>Total</b>	<b>2,211</b>	<b>100%</b>
<b>Total In Income Range</b>	<b>2,221</b>	<b>100%</b>
Less than \$10,000	190	9%
\$10,000 to \$19,999	455	20%
\$20,000 to \$34,999	704	32%
\$35,000 to \$49,999	187	8%
\$50,000 to \$74,999	381	17%
\$75,000 to \$99,999	99	4%
\$100,000 or more	205	9%
<b>30% or More of Income</b>	<b>1,114</b>	<b>50%</b>
Less than \$10,000	71	3%
\$10,000 to \$19,999	406	18%
\$20,000 to \$34,999	566	25%
\$35,000 to \$49,999	71	3%
\$50,000 to \$74,999	0	0%
\$75,000 to \$99,999	0	0%
\$100,000 or more	0	0%

Source: U.S. Census Bureau, 2019 American Community Survey

This data appears to signal demand for rental units affordable to renter household incomes from \$34,999 and less.

This translates to an affordable rental range between \$875 to \$375 per month.

Renter households between \$10,000 to \$34,999 income brackets experienced the greatest rates of housing cost burden in Brenham.

### Key Points of Housing Cost Burden Analysis

1. There were an estimated 12,625 households in Washington County and 5,774 households in Brenham according to 2019 ACS 1-Year data. Brenham held a 46% share of all households in the County. Also, Brenham represented 38% of all owners in the County and 68% of all renters in the County.
2. Of Brenham's 5,774 households in 2019, 62% (3,553) were owner-occupied households and 38% (2,221) were renter-occupied households. Median household incomes in Brenham were \$45,197 overall, \$60,347 for owner-occupied households, and \$23,750 for renter occupied households.
3. Approximately 46% (2,680) of all households were headed by householders between 35 to 64 and 35% (2,013) of all households were householders 65 years and over.
4. In Brenham 2,897 (50%) of all households earned less than \$50,000 annually. This was made up of 1,450 owners and 1,447 renters who made less than \$50,000. Furthermore, 684 (19%) of owner households made \$50,000 or less and were housing cost burdened and 894 (50%) of renter households made \$50,000 or less and were housing cost burdened.
5. In total 1,875 (32%) of all households in Brenham were housing cost burdened. There were 761 owner households that were housing cost burdened (13% of all households, 21% of all owner households) and 1,114 renter households that were housing cost burdened (19% of all households, 50% of all renter households).
6. Out of 3,553 owner households in Brenham, 46% (1,623) had a mortgage and 54% (1,930) were without a mortgage.

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## HOUSING SUPPLY ASSESSMENT

### Existing Home Market – Multifamily, Rental Units

This section examines the latest market trends for multifamily units in Brenham, looking specifically at local data gathered through field research by CDS along with multifamily market data for existing rental units and properties, and local market issues associated with the existing and potential new supply of rental units. Rental units were analyzed in the City of Brenham only.

This section will utilize 2021 PCensus housing unit data estimates in addition to multifamily market data from Texas A&M Real Estate Data Center and CoStar.

Several sources provide estimates for multifamily apartment units in Brenham that vary.

- PCensus 2021 – 794 apartment units
- CoStar 2021 – 916 apartment units
- ACS 2019 – 848 apartments units
- CDS 2021 – 1,023 apartment units

It should be noted that the multifamily apartment figures above include only units located in properties containing between 5 to 50 or more units. Total renter households in Brenham were estimated by PCensus to be 2,541. Besides multifamily apartments other rental housing can be single-family homes, duplex, triplex or fourplex rental units as well as mobile homes.

According to 2021 PCensus data there were 868 multifamily units in Washington County of which 794 (90%) were located in Brenham. Based on PCensus data multifamily units accounted for only 13% of the estimated 6,251 total occupied households in Brenham.

Based on CoStar and CDS market data it is of the opinion of CDS that there were around 1,023 total multifamily apartment units in Brenham. Of the 1,023 total units 530 (52%) were market rate and 493 (48%) were non-market.

Market rate units are available on the private market without any regulation as to how much rent can be charged or whether a lease is offered.

Non-market rate units are regulated by Section 8 voucher, public housing, income restricted, rent restricted, assisted or subsidized usually to those with a household income at or below the median.

For the purpose of this study CDS will use CoStar multifamily data, supplemented with data gathered by CDS, contained in the following section as the basis for analysis of Brenham’s multifamily apartment market.

CDS gathered property data by phone call or in person interviews with property managers as a means of confirming qualitative data and attaining additional data not provided by CoStar as well as gaining quantitative information about individual property performance and tenant profiles.

Based on interview discussions between CDS and apartment property managers in Brenham there was not a significant amount of COVID related impacts affecting occupancy at local apartment properties.

Property managers noted that pre-2020 occupancy of market rate apartment rental units typically hovered in the 90% to 95% range which indicates a healthy but tight multifamily apartment rental market.

**Figure 49: Brenham Multifamily Market Data, 2021**

INVENTORY UNITS	UNDER CONSTRUCTION UNITS	12 MO ABSORPTION UNITS	VACANCY RATE	MARKET RENT/UNIT	MARKET SALE PRICE/UNIT	MARKET CAP RATE
916 <span>+0%</span>	0 <span>-</span>	(20) <span>-452.7%</span>	5.9% <span>+2.2%</span>	\$751 <span>+1.0%</span>	\$120K <span>+9.1%</span>	6.3% <span>-0.1%</span>
Prior Period 916	Prior Period 0	Prior Period 6	Prior Period 3.7%	Prior Period \$744	Prior Period \$110K	Prior Period 6.4%

Source: CoStar

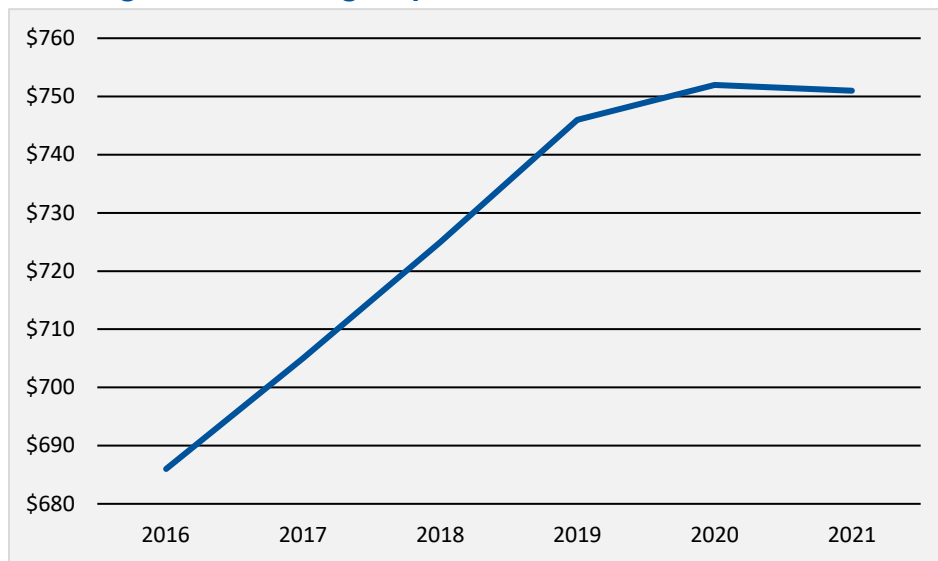
### 5-Year Multifamily Apartment Market Trends

The following charts provide a glimpse into the Brenham multifamily apartment market over the past five years.

According to data from CoStar the 2021 multifamily average rental unit rate in Brenham was \$750 per month at the time of this study. Apartment managers stated that rents had not risen greatly over the past several years.

Over the past 5 years average unit rent price went from \$686 in 2016 to \$750 at the time of this study, an increase of \$65 per month in that span.

**Figure 50: Average Apartment Rent Per Unit, 2016-2021**



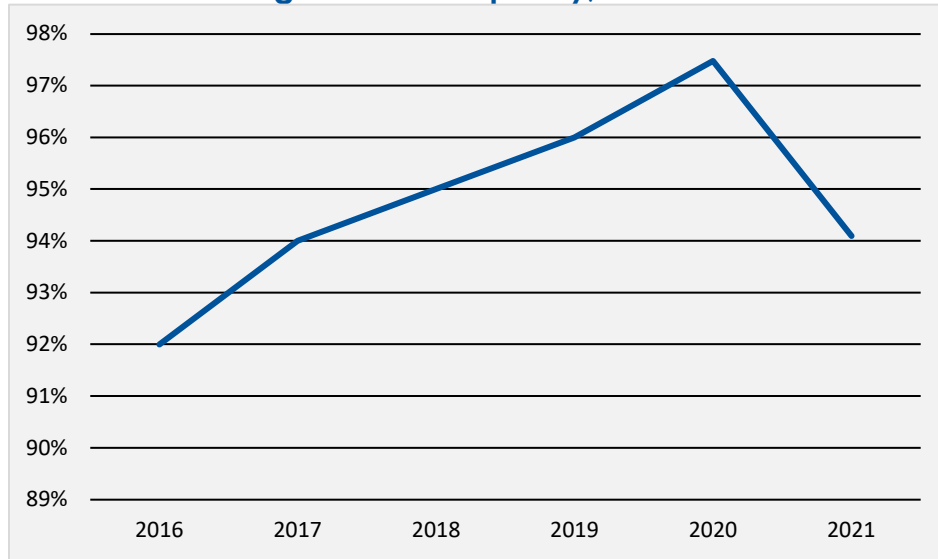
Source: CoStar



Occupancy throughout the past 5 years in Brenham has averaged around 95%, a healthy sign for the market. Brenham’s 95% occupancy rate of existing multifamily apartment units shows a healthy level of occupancy and falls within the commonly accepted industry average vacancy of 93%-94%. This indicates that demand for multifamily apartment rental units in Brenham is high and supply is low.

The very slight drop in occupancy in 2021 so far are likely COVID related. Blinn College students and workers shifting to remote/online attendance as well as those that may have relocated or switched to home ownership are the most plausible factors.

**Figure 51: Occupancy, 2016-2021**

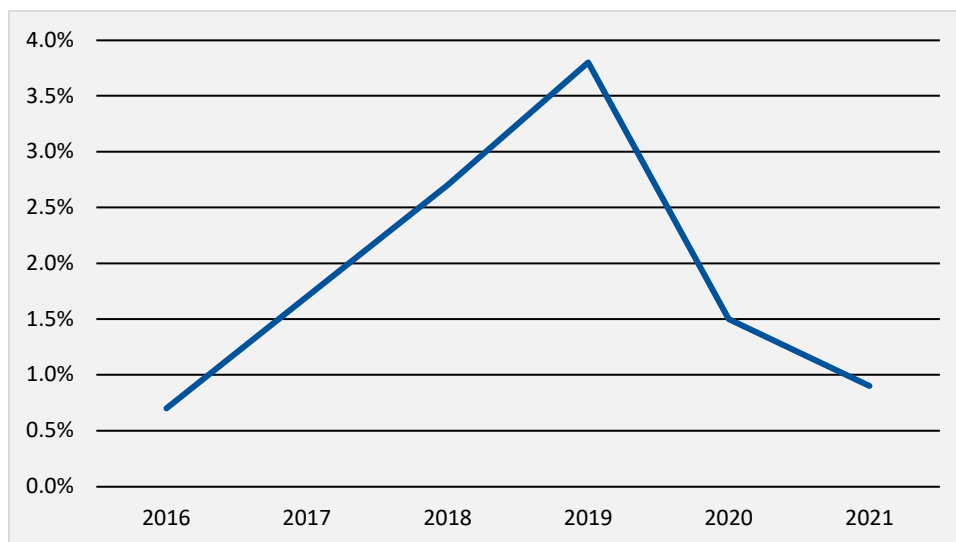


Source: CoStar

Rent growth occurred from 2016 to 2019 and ranged from 1% to 4% growth.

From 2019 to 2021 rent growth decelerated to just under 1% rent growth at the time of this study.

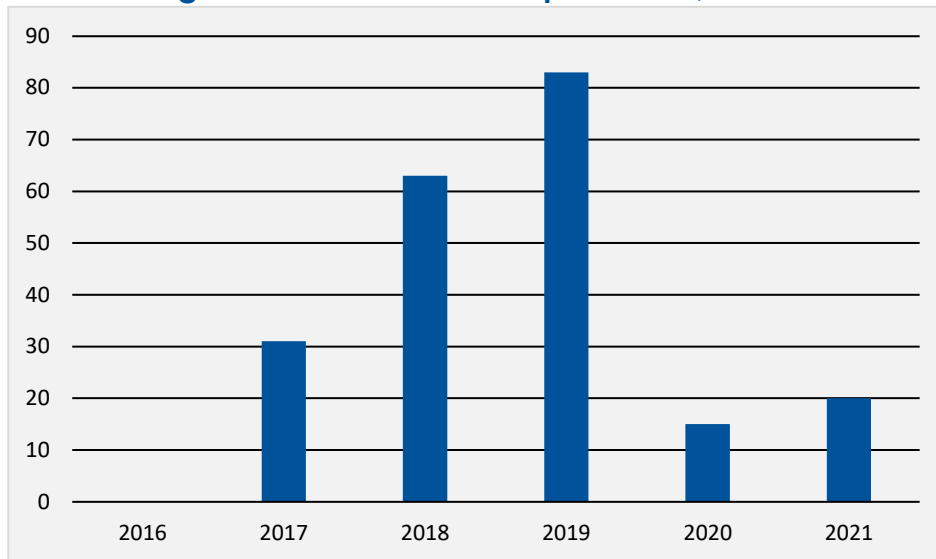
**Figure 52: Annual Rent Growth, 2016-2021**



Source: CoStar

Absorption of new multifamily units over the past 5 years peaked in 2019 with about 80 new units and a total of 212 units.

**Figure 53: 12 Month Absorption Units, 2016-2021**



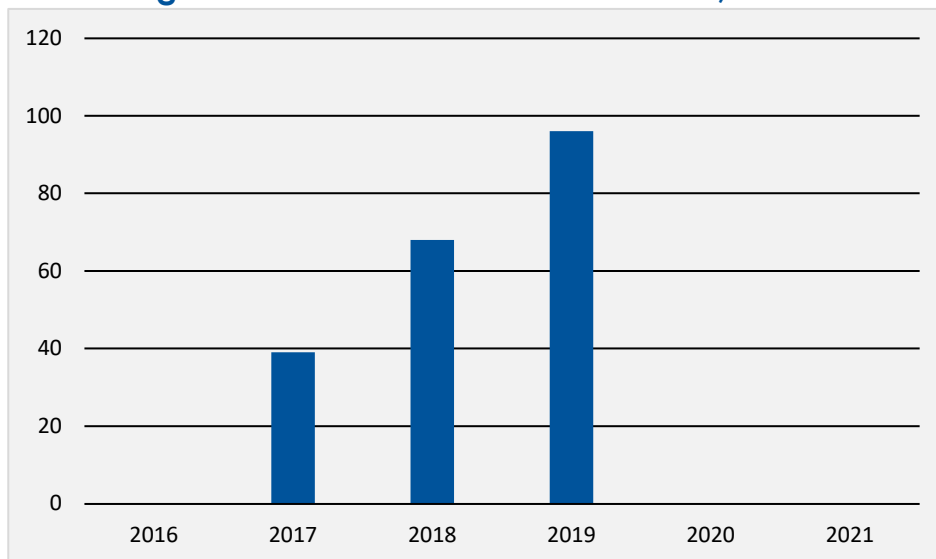
Source: CoStar

According to the data there were 203 units delivered in the past 5 years with 96 units delivered in 2019.

Of the most recently constructed multifamily apartment units in Brenham only the 16 units at Reserve on Sabine were market rate, the rest were non-market units.

According to this information since the year 2000 only about 50 new market rate apartment units have been built in Brenham.

**Figure 54: 12 Month Net Delivered Units, 2016-2021**



Source: CoStar

As previously mentioned, the apartment market data below was sourced from CoStar and supplemented with CDS field research for properties that were not listed on CoStar.

Highest average priced market rate units were in the \$1,000 to \$870 range and lowest average priced market rate units were \$725 to \$655. Occupancy in all unit types were high at an average of 95%.

**Table 55: Multifamily Apartment Complexes**

Property Name	Address	Yr. Built	Units	Avg. Sf.	Avg. Rent	Avg. Rent/Sf	Occupancy
<b>Market Rate</b>							
Austin Place Apartments	2307 S Austin St	1979	27	913	\$834	\$0.91	96%
Bren Sha Heights	101 E Airline Dr	1994		837	\$905	\$1.08	95%
Brenham Hills	505 W Third		57	750	\$725	\$0.97	
Westcreek Apartments	2327 Becker Dr	1982	44				95%
Brenham Park Apartments	500 College Ave		57	727	\$818	\$1.13	93%
Heritage Place	303 Goessler St		20	650	\$737	\$1.13	100%
Four-plex rental	308 Giddings Ln	1973	4	1,000			95%
North Park Apartments	910 N Park St	1981	26	729	\$758	\$1.04	
Reserve on Sabine	606 Sabine St	2018	16	965	\$1,074	\$1.11	
Stone Hollow Apartments	2401 Stone Hollow Dr	1983	112	739	\$867	\$1.17	93%
Cortin Village Apartments	2681 Cantey St	2006	30	764	\$780	\$1.02	92%
Pecan Tree	704 Pecan St		10	826	\$800	\$0.97	100%
Church Street Apartments	510 Church St	1982	16				95%
Manor Apartments	1000 S Day St	1971	32		\$720		95%
Olde Oaks Apartments	1500 Farewell St	1980	59	850	\$696	\$0.82	90%
Washington Court	206 S Market St		20	350	\$655	\$1.87	90%
<b>Total / Avg.</b>		<b>1984</b>	<b>530</b>	<b>772</b>	<b>\$789</b>	<b>\$1.10</b>	<b>94%</b>
<b>Income Restricted/Rent Restricted/Assisted/Subsidized</b>							
Brenham Oaks	2475 S Chappell Hill St	2002	76	992	\$731	\$0.74	94%
Jefferson Square	801 W Jefferson St	1995	44	742	\$546	\$0.74	
Belle Towers	696 N Market St	2016	76	827	\$554	\$0.67	97%
Brenham Village	600 Pleasant View Ave	1973	75	676	\$853	\$1.27	97%
Bluffview Villas	2699 Schulte Blvd	2006	76	959	\$641	\$0.67	97%
Northview Village	1901 Northview Circle		66	822			95%
Parklane Villas	800 Hosea St	2018	80				96%
<b>Total / Avg.</b>		<b>2002</b>	<b>493</b>	<b>836</b>	<b>\$665</b>	<b>\$0.82</b>	<b>96%</b>

Source: CoStar, CDS

Stone Hollow (112 units) and Olde Oaks (59) were the two market rate complexes with the greatest amount of units. Stone Hollow was built in 1983 but units have been updated as recently as 2021 and had an average unit rent of \$867.

Based on data used for the above table market rate unit rent per square foot was \$1.10.

The newest non market rate complexes was the 2016 built Belle Towers and the 2018 built Parklane Villas. Reserve on Sabine was the most recent market rate units built in Brenham in 2018 but only has 16 units. Also, as mentioned previously Blinn College recently completed 500 new beds in their new dormitory project. The Oaks at Brenham is a subsidized cluster of ten single-family homes along one street and it is considered multifamily but not apartments.

There were two non-market rate multifamily apartment complexes planned in Brenham at the time of this report – an 80 unit income restricted complex called Fairview Terrace and a 45 unit age and income restricted complex called Trinity.

### Brenham Multifamily Apartment Unit Rent

The table below shows rent and square feet for one, two and three bedroom market and non market multifamily apartment rental units in Brenham. The average rent for each unit size is shown at the bottom of the table.

Market rate 1 bed units were an average of about \$700 per month, 2 bed units at an average of \$880 per month, and 3 bed units at an average of \$946 per month.

Non market rate 1 bed units were an average of about \$600 per month, 2 bed units an average of \$686 per month, and 3 bed units at an average of \$870 per month.

**Table 56: Apartment Unit Square Feet and Rent**

	1 Bed Rent	2 Bed Rent	3 Bed Rent	1 Bed Sf	2 Bed Sf	3 Bed Sf
Austin Place Apartments	\$718	\$854		701	939	
Brenham Park Apartments	\$730	\$936	\$1,067	560	971	1,233
North Park Apartments	\$698	\$803		609	812	
Reserve on Sabine		\$1,076			1,025	
Stone Hollow Apartments	\$826	\$968		626	893	
Cortin Village Apartments	\$675	\$1,011		600	1,093	
Olde Oaks Apartments		\$703			850	
Manor Apartments	\$550	\$688	\$825		850	
<b>Average</b>	<b>\$700</b>	<b>\$880</b>	<b>\$946</b>	<b>619</b>	<b>929</b>	<b>1,233</b>
Income Restricted/Rent Restricted/Assisted/Subsidized						
	1 Bed Rent	2 Bed Rent	3 Bed Rent	1 Bed Sf	2 Bed Sf	3 Bed Sf
Brenham Oaks Apartments		\$699	\$801		916	1,121
Jefferson Square Apartments	\$536	\$603		711	880	
Belle Towers	\$545	\$587		749	1,030	
Brenham Village	\$742	\$840	\$938	530	699	729
Bluffview Villas	\$583	\$699		826	1,079	
Northview Village Apartments				680	964	
<b>Average</b>	<b>\$602</b>	<b>\$686</b>	<b>\$870</b>	<b>699</b>	<b>928</b>	<b>925</b>

Source: CoStar, CDS

The complexes that were able to be reached by CDS for this study stated that routine maintenance and or basic unit updates were being performed during tenant turnover.

Based on field research gathered during this study the current market rate multifamily apartment unit prices range from \$675 to \$1,000 per month.

Further analysis of CoStar as well as field research data on market rate unit rents and square footage in the table below shows more precise average market rate apartment unit square footage and rent by bedroom size. According to these figures average market rate rent per square foot was \$0.90.

**Table 57: Average Market Rate Apartment Unit Square Feet and Rent**

Beds	Avg Sq Ft	Avg Rent
1 BR	619	\$700
2 BR	940	\$880
3 BR	1,233	\$946
	<b>930</b>	<b>\$842</b>

Source: CoStar, CDS

**Multifamily Rental Rates Where Brenham Workers Live**

Surrounding areas where Brenham workers currently reside is a partial indicator of what new apartment complexes potentially could yield in Brenham, based on similar configuration, finish and amenities. It should be noted that in addition to higher average rents, local workers living outside of Brenham also pay higher commuting costs.

Basic amenities may include, security entrance, landscaping, garages and covered parking, pool, exercise room, meeting area, business center, upscale interior finishes or an in unit washer/dryer.

The average market rate multifamily apartment unit rent in areas where Brenham workers live was about \$1,150. Newer multifamily market rate apartment complexes in places like College Station, Bryan, Hempstead and Cypress could be looked to for examples of the type of new market rate apartments that could be developed to satisfy current and future rental demand.

**Table 58: Average Market Rate Apartment Unit Rent Where Brenham Workers Live**

	Workers	Avg. Apt. Rent
Houston	578	\$1,185
Austin	219	\$1,591
College Station	191	\$1,257
Bryan	188	\$967
Bellville	159	\$717
San Antonio	131	\$1,115
Hempstead	113	\$995
Cypress		\$1,397
<b>Average</b>		<b>\$1,153</b>

Source: LEHD, CDS

Larger metropolitan areas have an ample supply of a wide variety of housing of all types and levels of quality. Workers in Brenham may find that housing in other communities that are suitable to them is equally or even more expensive but also larger, newer, of better quality, or with more neighborhood amenities. For some, there may exist a willingness to pay more and also commute further.

**Figure 59: Brenham Market Rate Apartments**



Reserve on Sabine



Cortin Village Apartments



BrenSha Heights currently represents what might be considered sufficient for new exterior and interior finishes for a new market rate apartment complex in Brenham. The pool and landscaping at BrenSha Heights and Cortin Village as well as the design and amenities of the new non-market rate apartments in Brenham are examples of basic outdoor amenities for a new market rate apartment complex that should be looked to as market comparables.

### **Income Restricted/Rent Restricted/Assisted/Subsidized Units**

As previously explained market rate housing refers to multifamily housing that was constructed or purchased with 100% private dollars and does not have a ceiling on allowable tenant incomes.

On the other hand, non market rate (income restricted/rent restricted/assisted/subsidized) includes several types of rental housing that ensure affordability for tenant households making incomes less than the median by capping the amount of rent that can be charged for a certain unit or a cap on the amount of income the family or household makes.

Like regular market rate housing, most non-market rate rental housing developed today is financed, built and owned, either by non-profit organizations, housing authorities, local governments, or private businesses and corporations.

These organizations use a combination of private funding and public subsidies, often in the form of tax credits (LIHTC-Low Income Housing Tax Credit) and/or special housing construction loans, to construct new apartments and other rental housing affordable for low- and moderate-income families. These rental properties, units and rents are typically regulated by local, state and/or Federal agencies.

Based on field research CDS estimated 493 non market rate (income restricted/rent restricted/assisted/subsidized) multifamily apartment units in Brenham. This represents approximately 48% of the estimated 1,023 total multifamily apartment units in Brenham.

Two of the three newest multifamily apartment complexes, 156 out of a total of 172 units, were non market, restricted units. It should be noted that one of the non market complexes, the 80 unit Parklane Villas, houses Brenham Housing Authority residents relocated from older, decommissioned units. This means that the 80 new units replaced already existing units.

Even though Parklane Villas is non market rate, they did not house new residents to the community, it merely replaced existing units. Therefore, although the development of Parklane is the newest in town, it did not accommodate the growing population of new Brenham residents or workers in need of housing.

The final portion of this section estimates renter housing cost burden from 2019 ACS data for renter occupied households in Brenham.

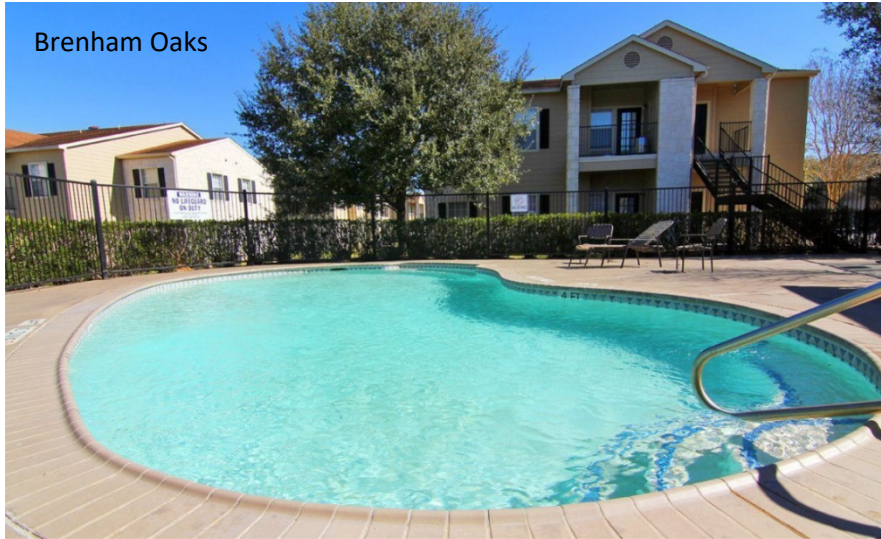
That data shows renter households making \$34,999 and less numbered 1,349. This represented 60% of all renters and 23% of all households in the City.

CDS believes this shows demand for a supply of at least 50-100 new restricted, non market apartment rental units with maximum rents of \$500 to \$875 per month in Brenham for local workers making \$35,000 or less.



Figure 60: Brenham Non-Market Rate Apartments

Brenham Oaks



Parklane Villas



Belle Towers



## Single-Family Detached Rental Units

Based on data estimates and CDS analysis, single-family rental home units seem to make up the bulk of market rate rental units in Brenham. Using PCensus 2021 data, out of 6,251 total occupied units 3,710 were owner occupied and 2,541 were renter occupied. Of the renter occupied units CDS estimates 1,000 were multifamily apartment units and 1,541 were single-family rental units.

Rents in single-family rentals have climbed in the last several years as a lack of new market rate multifamily apartment rental units in combination with investors have put a premium on single-family rental units, especially those located in desirable neighborhoods and with maintenance and updates.

Single-family rental landlords and property owners stated that occupancy has been high the past several years and current occupancies only happen if a tenant is moving out to buy a home or relocate elsewhere due to a job transfer.

When a unit becomes available, they begin to receive messages and calls within hours, and have the unit rented to a new tenant in hours or days or already have someone approved on the waiting list for a unit when a tenant does not renew their lease.

Vacant lots and developable land for new single family homes has risen in price, almost double from \$5,000 for a vacant, infill lot in 2019 to \$10,000-\$20,000 in 2021 making the creation of new single-family rentals cost prohibitive. In addition, the price of an existing single-family home in need of repair has risen from around \$100,000 or less in 2019 to around \$150,000 in 2021.

The supply of existing homes in need of repair that has typically served as a new or revitalized stock of single-family rentals in years past has been reduced significantly as investors have renovated the most desirable and feasible single-family properties.

Due to these main factors in combination with recent influxes of new jobs and new, higher income, or wealthier residents relocating to the area, the single-family rental market seems to be extremely tight.

Some in the real estate and local business community shared that they believe the severe lack of new and existing middle income rental housing (single and multifamily) to be the greatest housing challenge facing Brenham.

Single-family property managers and landlords cited receiving phone calls every day from prospective tenants seeking available single-family rental units in Brenham. This also indicates very high demand for single-family rental units.

Demand for single-family rental properties was greatest in the \$800 to \$1,200 per month range.

Occupancy in the newest and most desirable market rent apartment complexes is very high making desirable vacant two- and three-bedroom rental units hard to find. In addition, apartment managers stated three-bedroom units had the highest vacancy because those tenants know they can pay a similar monthly rate for a single-family rental with a yard and garage.

Therefore, the next best value for some renters is a single-family home rental, which keeps demand strong and prices high because the supply of new market rate rental units in Brenham has not kept up with the growth of new local businesses and population in the past two decades. This is largely why 76% of Brenham workers do not reside in Brenham.

All single-family landlords interviewed for this study shared that occupancy of their rentals was nearly 100% with any vacancies being due to basic updates, or maintenance as new tenants quickly line up for freshly vacant units or recent investor purchased units with basic updates.

The lack of new market rate multifamily apartment rentals in Brenham has created a low inventory of rental housing options.

With no existing or new move-in ready rental units in Brenham, single-family rentals with any level of updating or renovations rent out quickly and at what appear to be quickly increasing prices for investors and tenants.

The table below shows Brenham single-family rent ranges gathered by CDS.

**Table 61: Single-family Rental Price Ranges**

Bed/Bath	Price Range \$
<b>Oldest Houses/Minimal Rehabilitation</b>	
1/1 , 2/1, 2/2	\$400 - \$600
3/1 & 3/2	\$650 - \$900
<b>Rehabilitated Houses</b>	
2/2 & 3/2	\$950 - \$1,300
<b>Larger, Newer Houses</b>	
3/2+ & 4/2+	\$1,350 - \$2,000

Source: Brenham Chamber of Commerce

The smallest and oldest single-family rental units with minimal to no rehab was in the \$400 to \$600 per month range with three bedroom units getting a slightly higher rate from \$650 to \$900.

Newer built or more recently updated units were in the \$950 to \$1,200 range and the largest and newest units rented in the range of \$1,250 to \$2,000 or more.

Most single-family rental units in Brenham appeared to be well maintained, even the lowest priced, least renovated units by comparison with comparable housing stock in many other similar communities.

Figure 62: Single-Family Rental Units



## **Blinn College**

Blinn College is a public Junior college in Brenham, Texas, with additional campuses in Brenham, Bryan, Schulenburg, and Sealy. Brenham is Blinn's main campus, with dorms and apartments, and athletic facilities.

In 2019 there were approximately 2,800 students on campus in Brenham and about 1,765 (60%) of those lived on campus.

Most market rate multifamily apartment complexes said they do not rent to students, some complexes said they rented to students only on very limited cases. Construction of new student housing has been taking place over the past several years and a 500 bed complex will be complete by the end of 2021.

There were no plans for new student housing development after completion of the newest complex; however, Blinn College's long term plans could double current enrollment figures. Some new enrollments currently and in the future will be online, not on campus. At the moment and in the near future indications did not appear to show excess demand for additional student specific housing in Brenham.

Blinn employs around 300 combined part and full time with about 65%-70% of those making between \$32,000-\$38,000 with the rest making below and above those amounts. Turnover was cited as low, yet the college owns 5 single family homes for employees to rent, a sign of the very low supply of market rate multifamily apartment units in and around Brenham for local middle income workers.

In the experience of CDS over the past 5 years that new, small lot housing types like low rise apartment, townhome and duplex and fourplex units greatly enhance housing choices for locally employed workers at all pay scales. CDS has observed that new market rate apartment, townhome, and rowhouse development quickly improves excessive tightness in the local rental market as well as improves the ease of recruitment of academic and athletic talent (both students and staff), and that this is specifically the case in other communities within Texas that have a local college or university and that are comparable in size to Brenham..

CDS believes that potential students and certain Blinn employees who commute from outside of Brenham would be eager for the chance to live in a new apartment, rental home or possibly entry level for-sale home in Brenham while paying similar rates comparable units they currently live in places like Bryan, College Station, Cypress, and Hempstead.

### Affordable Multifamily Demand

Estimating the magnitude of affordable housing demand requires the establishment of standards for affordable rent levels and home purchase prices. This is relatively straightforward for rental housing, as household income levels can be directly translated into affordable monthly rents at a maximum of 30% of gross income. It should be noted that considerations such as security deposits, incarceration records, credit scores, family size, willingness to share with roommates, and other household expenses (medical payments, transportation expenses, student loan debt, etc.) are obviously important in determining the affordability levels for individual households but are beyond the scope of analysis for this report.

The table below shows annual household incomes across the top with maximum affordable rent as 30% of those incomes across the bottom.

**Table 63: Affordable Rent Calculation**

Annual income	\$15,000	\$20,000	\$25,000	\$30,000	\$35,000	\$40,000	\$45,000	\$50,000	\$55,000	\$60,000	\$65,000	\$70,000	\$75,000
Hourly wage rate	\$7.21	\$9.62	\$12.02	\$14.42	\$16.83	\$19.23	\$21.63	\$24.04	\$26.44	\$28.85	\$31.25	\$33.65	\$36.06
Weekly wage	\$288	\$385	\$481	\$577	\$673	\$769	\$865	\$962	\$1,058	\$1,154	\$1,250	\$1,346	\$1,442
Monthly income	\$1,250	\$1,667	\$2,083	\$2,500	\$2,917	\$3,333	\$3,750	\$4,167	\$4,583	\$5,000	\$5,417	\$5,833	\$6,250
<b>Max. Rent</b>	<b>\$375</b>	<b>\$500</b>	<b>\$625</b>	<b>\$750</b>	<b>\$875</b>	<b>\$1,000</b>	<b>\$1,125</b>	<b>\$1,250</b>	<b>\$1,375</b>	<b>\$1,500</b>	<b>\$1,625</b>	<b>\$1,750</b>	<b>\$1,875</b>

Note: Hourly wage rate based on 2,080 hours/yr.

The most relevant estimate of affordable rental housing need in Brenham has been taken from 2019 American Community Survey data as related in an earlier section of this report. Out of approximately 5,774 total households 2,221 were renters and 3,553 were owners. There were an estimated 1,798 total households experiencing housing cost burden in 2019 in Brenham. Of those, 1,114 were renters and 684 were owners.

Out of 666 cost burdened renters 94% (1,043) of renter-occupied households paying at least 30% of their income in rent made \$34,999 and below.

Based on the Affordable Rent Calculation a summary of the total cost-burdened renter households as of 2019 within household income brackets making \$49,999 and below and the maximum rent they should pay to avoid being cost-burdened, is as follows:

**Table 64: Estimated Brenham Affordable Rental Housing Need by Income Range, 2019**

Income Range	# Cost-Burdened Households	Monthly Rent Range Needed
Less than \$20,000	477	Under \$500
\$20,000 to \$34,999	566	\$500 to \$875
\$35,000 to \$49,999	71	\$875 to \$1,250
<b>Total</b>	<b>1,114</b>	-

Source: US Census Bureau American Community Survey 2019 1-Year Estimate

These estimates may be understated or somewhat insufficient because:

- Some households may have other expenses (notably children, healthcare, education and transportation) which lowers the range of rent needed to have a truly manageable household budget; their needed monthly rent range is much lower than what is reported in the table.
- Some renter households are not classified as cost-burdened because they are “doubling up” with other renters in a situation more crowded than they would prefer, but necessary to avoid being cost-burdened. This is taking place at reportedly high levels amongst lowest wage-earning workers in Retail and Food and Accommodation Services.
- These figures are based on the 2019 1-Year ACS. Given job and population growth in the City and County as well as the pandemic, the current numbers for 2020 are likely higher than those shown in the table as retail jobs and population have increased in Brenham since then.

## Key Points of Multifamily Analysis

The bulk of new multifamily units in Brenham over the last 20 years have been non-market, income or rent-restricted or subsidized units.

In the past five years there have been around 120 net new multifamily apartment units built in Brenham, only 16 of which were market rate.

In that same period of time there has been an estimated increase of at least an estimated 2,000 residents and 300 jobs in Brenham.

This means that local Brenham worker households with incomes greater than about \$35,000 who do not qualify for non-market units are forced to seek housing outside of the City. Demand for new market rate apartment units in Brenham appeared to be greatest in the \$750 to \$1,150 per month range.

With most of Washington County rental units located in Brenham, many are forced to seek market rate apartment units in places farther away from Brenham and outside of Washington County in places like Harris County (Cypress), Waller County and Bryan/College Station.

This in turn increases challenges for local Brenham based employers to hire and retain workers. In particular, employers such as the school district, college, hospital, manufacturers as well as municipal and county workers all stated to CDS in interviews that the lack of market rate multifamily apartment units for middle income workers in Brenham has created barriers to hiring and retaining their workforce as well as having sufficient workers to meet current demand as well as plans for future expansions in Brenham.

If new multifamily market rate apartment units are not built in Brenham in the near future then some local businesses could decide to expand their businesses in communities other than Brenham.

Furthermore, the lack of enough multifamily market rate apartment units to meet current and future local worker demand will also prevent new employers from choosing to move to Brenham.

CDS believes that current and prospective Brenham workers would be eager for the chance to live in a new apartment, rental home or entry level for-sale home in Brenham while paying similar rates comparable units they currently live in places like Bryan, College Station, Cypress, and Hempstead.

Around 150-200 new market rate rental units would be an acceptable start to provide new market rate rental housing to the 76% (9,636) of Brenham workers living outside of the City.

Incidentally, this is right around the project size at which a developer of new market-rate multifamily housing is able to achieve economies of scale not only in terms of initial construction costs, but also in terms of on-site staffing and maintenance and the provision of high-quality common area amenities.

Scale is critical to individual multifamily projects which are built all-or-nothing and then leased up all-at-once. A developer will thus have two big concerns: 1) the ability to finish leasing up before first-year rental concessions need to get burned off because they understand that there will be some turnover in this process, and they don't want to get stuck in a position where they're having to try to fill new units in addition to backfilling turnover at the same time; and 2) that there is a sufficient depth of demand at a given price level to cover stabilized market rents.



Scale largely explains why there has been so little new market rate multifamily apartment development in recent history; and it also explains why the developers of Cortin Village and Reserve on Sabine have been committed locals rather than larger outside entities backed by institutional investors.

This is unlike single-family development that can be phased-in and ramped-up or stopped such as changing market conditions allow.

Scale is also not as pressing a concern for subsidized housing because below-market rates effectively guarantee the existence of a tenant base and rapid absorption.

The current rental market dynamic in Brenham allows existing market rate apartment units to charge higher rents. With zero supply of new market rate units this means the prices of existing, older units can go as high as local wages will allow. This puts a squeeze on local businesses and local workers as the limited supply of existing market rate rental units grow in demand and price.

Units are updated with basics such as flooring and paint during tenant turnover at the properties CDS was able to survey. This does keep the limited supply of market rate units as attractive as possible. CDS did not find any signs of poor property management. On the other hand, this allows for landlords to justify increases in rent if they so choose. With a limited supply and calls from new prospective tenants, owners and managers know they have the ability to raise rents without losing future occupancy.

Luckily, many Brenham market rate apartment owners are longtime locals and feel a sense of obligation to keep rents reasonable and fair to the pay scale of locally employed wage earners. If not, Brenham could have much higher market rate apartment rates than what is currently seen.

The lack of new market rate multifamily apartment units in Brenham over the past 20 years appears to be felt by local businesses and institutional employers by presenting employee hiring and retention challenges. This is mostly brought on by the lack of new supply and dissatisfaction with the very limited existing supply of rentals.

Particularly, this impacts businesses hiring recent college graduates as well as higher paid manager, executives and highly educated or skilled prospects who tend to desire a quality rental while seeking more permanent housing.

With many newer constructed multifamily rental properties in surrounding areas outside of Washington County, Brenham workers, especially younger professionals, are increasingly left with little choice but to secure multifamily rental units there.

This adversely impacts recruitment and retention for positions that are vital to the community's success and quality of life such as, teachers, healthcare and social services, police, fire, EMS, city, service and retail workers as well as higher qualification, higher paid professional positions, has become a much greater challenge in recent years.

Market rate apartment rental unit rates were an average of \$750 per month, in the general range of \$750 to \$945 per month.

The highest priced market rate apartment rents in Brenham are found in Reserve on Sabine (the newest market rate units in Brenham) at \$1,076 for a 2 bedroom unit and Cortin Village at \$1,011 for a 2 bedroom.

Other communities like Kerrville, Bastrop, Huntsville, San Marcos, New Braunfels, Seguin, and Fredericksburg all have newer multifamily market rate rental housing with quality amenities and with price levels well in excess of those demonstrated by older, smaller and less amenitized, and/or less optimally located properties in Brenham.

The properties surveyed on average said their occupancy was 90% or greater and quantitative data from CoStar was also greater than 90%.

There were around 1,023 total multifamily apartment units in Brenham. Of the 1,023 total units 530 (52%) were market rate and 493 (48%) were non-market.

One and two bed units seemed to be of greatest demand with the lowest vacancies.

Several property managers noted that non-COVID related vacancies were mostly those moving into home ownership or those moving to another job in an area outside of Brenham as a result of their or their partner/spouse’s employment changing.

Occupancy in the 90% range for any market indicates that additional unit supply could likely be rented if constructed in Brenham, provided that property amenities and finishes are reasonable and commensurate with rents that are achievable in the local market (not positioned like properties built in urban cores or master-planned communities of a major metropolitan area).

Maximum unit cost should stay as closely in line with average local wages as possible. This could be accomplished in part by moderating property amenities and finishes to help lower risk, construction and rent prices.

Property managers noted that they receive calls weekly from prospective tenants which displays a high demand for market rate apartment units in Brenham.

This indicates additional supply of new market rate apartment rental units of a similar class to Cortin Village, and BrenSha Heights could be supported in Brenham.

The table below shows the various estimates of various median household income figures for Brenham from PCensus 2021, 2Q2020 Washington County average weekly wage, and 2019 ACS median, owner and renter household incomes and the affordable rent and for-sale price (30% of household income dedicated to housing) for Brenham.

Income Type	Income	Rent	For-Sale
2021 PCensus Median Household Income	\$53,075	\$1,327	\$168,000
2Q2020 QCEW Washington County Avg. Weekly Wage	\$50,076 / \$963	\$1,250	\$158,000
2019 ACS Brenham Med. HH Income	\$45,197	\$1,130	\$140,500
2019 ACS Owner Median Income	\$60,347	\$1,500	\$194,000
2019 ACS Renter Median Income	\$23,750	\$600	\$65,500

With average market rents in the \$750 range for apartment units in Brenham appear to be very affordable for the City’s median household income and County average weekly wage. However, this price range represents units in complexes that are aging and in a lower condition than might be typically acceptable for many prospective Brenham worker households with annual incomes of \$45,000 and greater.

Multifamily rental properties in the City overall appeared to be in decent to good condition, however, older and aging complexes and an overall lack of on-site amenities appears to be impacting the City's ability to attract younger, college educated professionals and entrepreneurs.

The two newest multifamily apartment complexes in Brenham were tax credit/income restricted properties. There was also a market rate complex built in 2018 but with only 16 total units.

Based on data estimates and CDS analysis, single-family rental home units seem to make up the bulk of market rate rental units in Brenham. Using PCensus 2021 data, out of 6,251 total occupied units 3,710 were owner occupied and 2,541 were renter occupied. Of the renter occupied units CDS estimates 1,000 were multifamily apartment units and 1,541 were single-family rental units.

The age and condition of these rental units varies throughout the City however, extensive blight and deterioration of existing single-family homes was not evident.

The stock of sub-\$100,000 priced existing single-family homes in Brenham has been effectively exhausted by individuals as well as professional real estate investors as they have been the main consumers of housing in these prices in order to flip and rent or re-sell.

Interviews with individuals and landlords conducted by CDS demonstrated a strong demand and interest from local small investors in acquiring, remodeling and updating the lowest priced existing homes primarily for single-family rentals but also for re-sale to buyers. However, with such limited supply of available properties of this type, there now exists a constraint upon the ability of investors to supply renovated single-family housing either to prospective renters or to middle-income homebuyers.

This has tightened the supply and increased the price of market rate multifamily rental units in Brenham.

This was reflected in interviews with multiple multifamily property managers who stated they had recently raised monthly rents at many properties by an average of \$25 to \$50 per month in the past year or two.

Although rent prices have risen somewhat over the past years in Brenham market rate rents appear to be sustainable for existing tenants, the lack of supply is the main issue since demand for market rate rental housing clearly outstrips supply.

With a greater supply and selection of market rate multifamily units in areas surrounding Washington County just more than 75% of Brenham workers find rental housing outside of Brenham.

Brenham's local economy seems to be on a solid footing and has been largely resilient through the COVID-19 pandemic; and no employers indicated a downsizing in the near or distant future. That being said, several large employers interviewed shared indications that future expansions of their workforce could happen immediately if more market rate rental units were available.

Additionally, any new jobs created in Brenham will create even more demand for new market rate rental units.

Therefore, new rental unit housing demand does appear to exist given the market tightness and pace of new hires combined with the lack of any new market rate multifamily housing built in the past several decades in Brenham.

Higher wage workers, particularly younger professionals and higher-level management across all sectors of employment, did share that higher end rental units would satisfy an existing housing need in Brenham.

The construction of apartment units in the \$850-\$1,200 average rent range in Brenham could be supported in a new 150 to 200 unit market rate complex which is a housing product that CDS has observed being developed in similar markets across Texas. In similar sized markets CDS has observed new multifamily construction with properties ranging from 40 units, 60 units and 120 units with market rate rents for 1 bed units at \$700 per month, 2 bed units at \$995 per month and 3 bed units at \$1,300 per month in smaller communities like Brownwood and Early, Texas.

Additional multifamily apartment and single-family rental units are needed in Brenham for lower to moderate income workers employed at small locally owned businesses and public or institutional staff, as well as higher income workers, particularly new hires moving in from larger metros and colleges.

New hires would likely be up to 12 month renters that might transition into home ownership if more entry level homes were available. Lower income workers are more likely to reside longer term for multiple years in non-market rate, income restricted or lower priced market rate units until being able to increase incomes to enter more desirable market rate apartments or affordable home ownership, if additional supply was made available in Brenham.

It is the opinion of CDS that a newly constructed market rate apartment complex of 150-200 more or less units could be quickly supported at average prices of \$850-\$1,200 per month in Brenham based on the level of current and continued demand from workers at existing local employers.

This could be achieved by new market rate complexes at average prices of \$950+ and about \$1.00+ per SF. This is seen in more recent multifamily rental units in market surrounding Washington County where a growing number of Brenham workers are choosing to live.

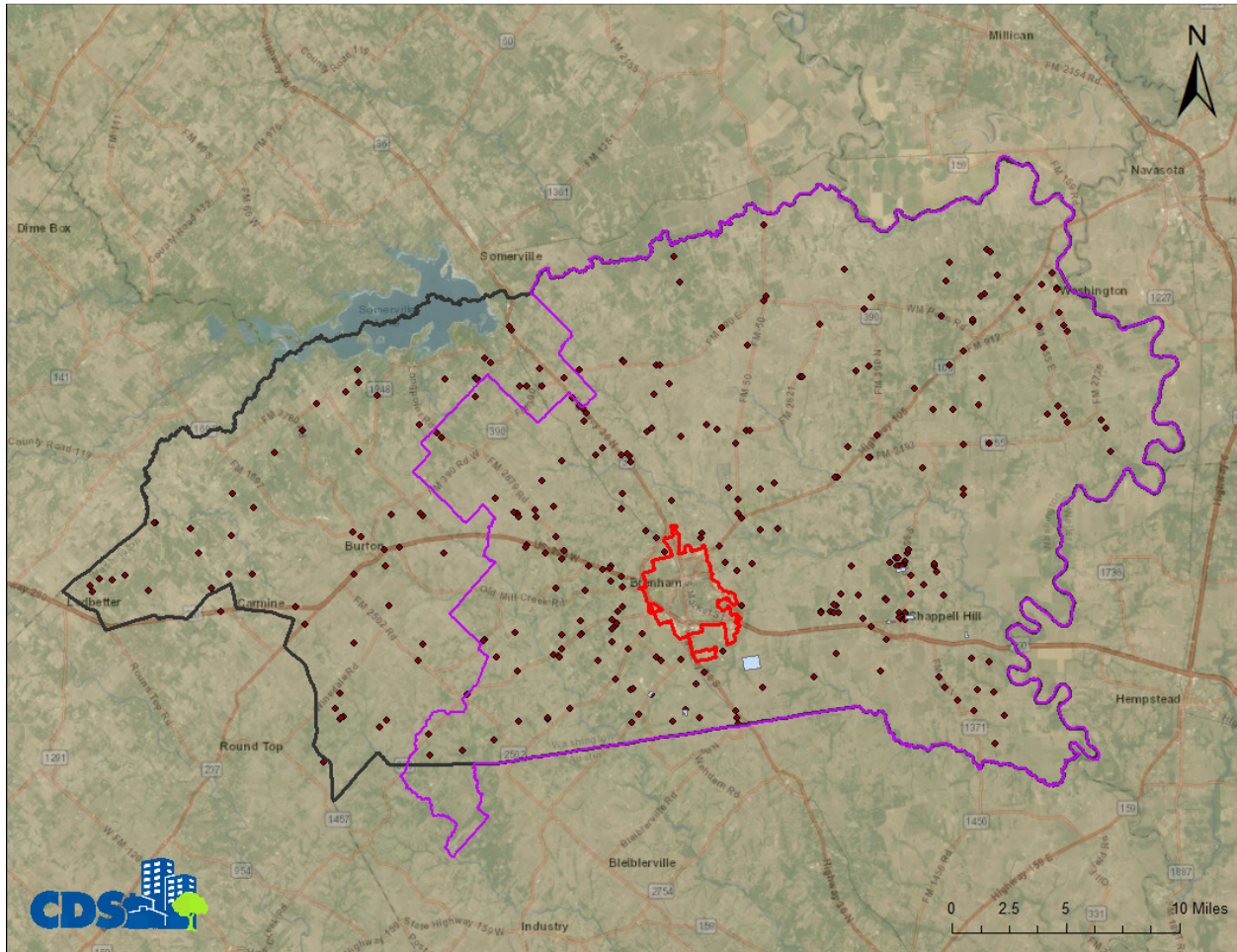
On site amenities such as a pool, package delivery lockers, gym/workout room, gated entry, landscaping, dog run, and covered parking would be justified given the complete lack of market rate complexes with such amenities in Brenham.

## Existing Home Market – Single-family, For-Sale Homes

This section examines the latest market trends for single-family for-sale homes in Brenham.

The analysis of the market utilized MLS sales transaction data taking place within Brenham ISD from 2011 to June 2021 provided courtesy of Texas A&M University Texas Real Estate Research Center.

**Figure 65: Brenham ISD, City of Brenham, Washington County**



The map above shows Brenham ISD outlined in purple, City of Brenham outlined in red, Washington County outlined in black along with red dots that represent the location of septic tank permits issued in 2020 and 2021 to indicate homes located outside the city of Brenham.

CDS completed field research consisting of visiting new home construction sites along with group and personal interviews with local developers, builders and sales agents.

Several sources provide estimates for single-family owner occupied units in Brenham that vary slightly.

- PCensus 2021 – 3,710 single-family owner occupied units
- ACS 2019 – 3,553 single-family owner occupied units

According to 2021 PCensus data there were 14,068 total occupied households in Washington County of which 10,152 were single-family owner occupied units. There were an estimated 3,710 owner occupied single-family homes located in Brenham which represented 37% of the County's households.

Single-family owner occupied units accounted for 60% of the estimated 6,251 total occupied households in Brenham.

Exterior conditions of single-family homes appeared to be generally well maintained by comparison with many other nearby communities. About 60% (4,239) of Brenham housing units were built prior to 1990.

New entry level homes are being built by Stylecraft and D.R. Horton on the northwest side of Brenham and several small subdivisions with larger lot production and custom homes are located in several areas in and near town.

The data in the following section examines historical and recent market trends for single-family homes sales in Brenham, looking specifically at local real estate sales statistics, and local market hindrances associated with increasing the housing supply.

The following MLS single-family residential home sale data for Brenham was provided via the Texas Real Estate Research Center at Texas A&M University. The data covers the last 10 years from 2011 through 2020. This data provides insight into local real estate market trends.

### Existing Single-family Supply and Inventory

The year 2017 saw the greatest volume of single-family home sales out of the past 10 years with 368 sales on the MLS. This does not consider pocket listings that occurred which were not listed.

Home sale volumes increased each year since 2011 until 2019 saw a slight decrease. This could indicate the shrinking availability of homes for-sale rather than demand-side weakness.

Homes at the lowest price ranges of \$100,000 and below and \$100,000 to \$159,999 went from a high of 65% of all homes sold in Brenham in 2012 to a low of just 17% in 2020.

On the other hand, homes priced \$160,000 to \$239,999 made up 26% of home sales in 2011 to 40% in 2020.

Homes that sold at prices \$240,000 and greater represented 17% of sales in 2011 and 44% of sales in 2020.

The increase of home prices sold in Brenham since 2011 and particularly the sharp increase in prices of homes sold seen in 2018 and 2020 clearly exhibits the dynamics of supply and demand. As demand has gone up supply has not kept pace. In turn this has increased the price of single-family homes significantly.

**Table 66: Brenham Homes Sales by Price Ranges, 2011 – June 2021**

Price Ranges	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2011-2020 % Change
\$0 - \$99,999	42	44	51	45	44	33	33	22	18	12	0	-71%
\$100,000 - \$159,999	73	102	107	119	103	123	86	52	43	41	23	-44%
\$160,000 - \$199,999	39	44	54	64	65	59	86	56	63	63	15	62%
\$200,000 - \$239,999	13	11	24	46	43	47	49	74	54	65	22	400%
\$240,000 - \$279,999	13	12	8	22	35	30	44	48	34	54	22	315%
\$280,000 - \$399,999	18	10	30	29	41	51	48	64	66	57	42	217%
\$400,000 - \$3,000,000 +	3	3	10	5	21	14	22	21	19	29	23	867%
<b>Total</b>	<b>201</b>	<b>226</b>	<b>284</b>	<b>330</b>	<b>352</b>	<b>357</b>	<b>368</b>	<b>337</b>	<b>297</b>	<b>321</b>	<b>147</b>	<b>60%</b>

Source: Texas A&M University Texas Real Estate Research Center

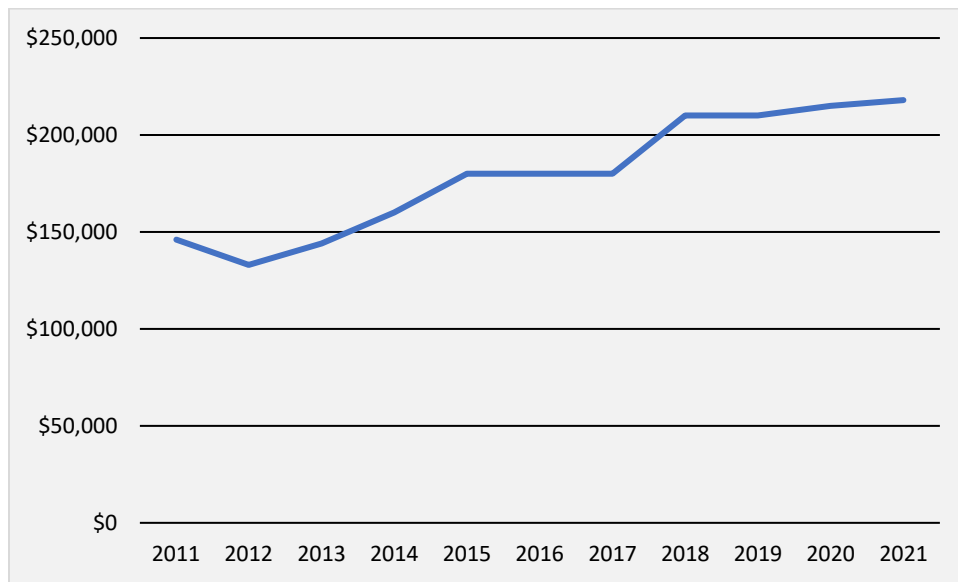
The chart below was estimated by CDS based on limited sales data by price range group by year from MLS transaction data provided by Texas A&M University Texas Real Estate Research Center.

The chart shows the trajectory path of median home prices sold in Brenham from 2011 to June 2021. The data shows that the median home price in Brenham has steadily increased 49% from around \$146,000 in 2011 to around \$218,000 in June 2021 at the time of this report.

The median price of homes in most places in Texas and the rest of the country saw spikes in prices in 2020 and 2021 due to supply chain bottlenecks, additional demand induced by work from home and desire to live in more rural cities like Brenham. However, looking at the chart the median price of homes sold in Brenham increased almost each year leading up to 2020 and 2021.

This is due in part because supply of market rate multifamily and single-family has not kept up with demand as well as local population and job growth which increased prices for the limited supply of existing homes that do go up for sale. This keeps home prices higher than the value that the age and condition of existing homes might otherwise suggest, especially for older homes in greatest need of deferred maintenance and updates.

**Table 67: Brenham Median Home Sale Price, 2011 – June 2021**



Source: Texas A&M University Texas Real Estate Research Center, CDS



The table below displays sales volume of homes by days on market.

Total sales overall increased from 201 in 2011 to 321 in 2020.

Homes sold in less than 31 days in Brenham went from 9% of all homes sold in 2011 to 52%, of the 147 homes sold as of June 2021. This shows the dramatic increase of velocity of home sales in Brenham since 2011. Realtors interviewed for this report stated that the majority of home sales in Brenham over the past year were either all cash or 20% or more down payment with conventional loans, not FHA or other government backed loans.

**Table 68: Brenham Days on Market (DOM), 2011-2021**

DOM	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2011-2021 % Change
0	19	46	62	65	119	117	104	111	120	124	77	553%
31	39	40	52	74	91	67	67	73	55	69	17	77%
61	28	30	46	50	53	55	45	35	40	40	15	43%
91	14	31	20	51	27	40	23	29	27	27	17	93%
121+	101	79	104	90	90	78	80	89	55	61	21	-40%
<b>Total Sales</b>	<b>201</b>	<b>226</b>	<b>284</b>	<b>330</b>	<b>380</b>	<b>357</b>	<b>319</b>	<b>337</b>	<b>297</b>	<b>321</b>	<b>147</b>	<b>60%</b>

Source: Texas A&M University, Texas Real Estate Research Center

*Existing Single-Family For-Sale Home Inventory*

Current listings as of June 2021 in Brenham are broken down by price in the table below.

There were no homes listed in the two lowest price ranges, \$0-\$99,999 and \$100,000-\$159,999. This gives evidence to the fact that there are no existing or new homes in Brenham for what had historically been considered entry-level prices

**Table 69: Current (6/2021) MLS Active For Sale Listings**

Price Ranges	2021
\$0 - \$99,999	0
\$100,000 - \$159,999	0
\$160,000 - \$199,999	6
\$200,000 - \$239,999	4
\$240,000 - \$279,999	13
\$280,000 - \$399,999	8
\$400,000 - \$3,000,000 and over	15
<b>Total</b>	<b>46</b>

Source: Texas A&M University, Texas Real Estate Research Center

About 20% of homes for sale in Brenham were between \$160,000 to \$239,000.

Many of these properties, according to local real estate agents, are not optimal for first time home buyers as they are more suited for investors or buyers with the will and finances to remodel and update the home after purchasing.

But even investors are not buying homes in \$160,000s in Brenham because at this price plus repairs and upgrades, profits are hard to make and the added costs pose a huge risk to small time investors.

The \$200,000-\$239,999 price range usually accommodates family households with two incomes or move up or move down homes for existing owners who want to sell.

Through the interviews with agents, builders and developers CDS found that about half of the homes sold in Brenham over the past two years were to either retired, passive income, or remote worker households who were not considered local workforce households.

50% of the homes for sale as of June 2021 in Brenham were priced \$280,000 and greater.

Realtors use the term “months of supply” to describe the inventory of homes on the market. Simply put, months of supply is the number of months it would take for the current inventory to sell out if sales continued at the current rate and no new inventory was added.

Based on 2020 sales volume Brenham averaged 27 sales per month. With 45 homes listed for sale as of June 2021 single-family home supply inventory was only 1.6 months, a clear sellers’ market.

Generally, a supply greater than seven months is considered a buyers’ market, between five to seven months is a balanced market, and less than five months is a sellers’ market.

1.6 months of homes on the market makes Brenham as mentioned is a very strong sellers’ market and very tight market for prospective buyers. This shows the extreme lack of supply and housing choice options for prospective Brenham home buyers.

### ***New Single-family Housing Construction***

New homes are currently being built in Brenham by Stylecraft and D.R. Horton.

These are two large volume builders typically associated with reasonably priced entry level and move up single-family homes typically priced starting in the low \$200,000s.

Prices currently are elevated due to high demand and at the time of this study started in the \$275,000 to \$283,000 price ranges. Buyers are usually local family and worker households.

Over the past several years buyers for these homes were well qualified with 20% or greater down payments with conventional financing.

There are also two custom home developments totaling around 80 total lots currently in development in Brenham.

The developments use only approved custom builders and are more strictly regulated and on much larger lots than Stylecraft or D.R. Horton.

Custom lots are in the \$60,000 to \$80,000 price range and custom home construction costs vary depending on customer preference but can range from \$300 to \$500 psf and usually total in the \$500,000 to \$800,000 range once completed. These buyers pay in all cash with no financing.

### Stylecraft – Vintage Farms

Stylecraft are nearly complete on phase one of their Vintage Farms development that features new single-family two, three and four bedroom homes with eleven different floor plans ranging from 1,266 square feet to 2,612 square feet on 55' lots. Due to high demand and material and labor bottlenecks they are only building spec homes, then establish a listing price and start taking offers only when a home gets nearly complete with the framing stage of building.



There are approximately 400 total lots currently in Stylecraft's inventory. Vintage Farms' first phase with 102 total lots had 10 lots available for sale at the time of this study and the remaining 92 were sold.

144 lots are currently being developed. Of those 62 are in development, 44 are being built on with vertical construction, and 20 have been closed on while still in varying stages of construction.

There will be a townhome section with attached/shared wall units with about 50 total units on 30'x120' lots.

Recent buyers in Vintage Farms include retirees, empty nesters, teachers, police, city/county workers, first time homebuyers, and single millennials.

Prices at the time of this study were in the \$215,000 to \$300,000 range.



### D.R. Horton – Liberty Village

Just to the east of Vintage Farms lies Liberty Village, D.R. Horton’s new single-family home development with a combined total inventory of 321 total lots that will be developed in three separate phases. Phase one has been completed, phase two is currently underway and phase three will start before the end of 2021. At the time of this study in July there were 23 homes sold in Liberty Village.



Seven different floor plans range from 1,368 to 2,150 square feet and homes are on 55' lots.

Only four homes are currently available for sale at Liberty Village:

- \$281,505 / 3 bed, 2 bath / 1,508 sf. / \$187 psf.
- \$271,210 / 4 bed, 2 bath / 1,568 sf. / \$173 psf.
- \$319,800 / 3 bed, 2 bath / 2,150 sf. / \$149 psf.
- \$264,755 / 3 bed, 2 bath / 1,605 sf. / \$165 psf.

The most popular model is the lowest priced 3 bedroom Alpine floor plan or the Prescott floor plan with 4 or 5 bedrooms, usually occupied by families with school age children. About half the buyers have been retirees from the Houston area, the rest were young families getting out of rentals or older homes, teachers, bank workers, construction workers; most worker households were employed locally.



Most buyers use conventional financing as opposed to FHA.



### Thielemann Homes – Heritage Oaks

Local custom builder Thielemann Homes currently is working on Heritage Oaks located just south of Gun and Rod Rd. on the southeast side of Brenham with 37 total custom home lots.

Eleven custom lots have been sold leaving 26 available lots for sale in Heritage Oaks.

Lots currently range from \$67,000 to \$120,000 and custom home construction price varies based on the desires and preferences of the customer.

Custom homes in Heritage Oaks can range from \$500,000 to \$800,000 and almost all clients pay all cash with no financing. In the past two years custom home demand in Brenham has increased significantly.

All custom home clients in the past two years have been business owners, retirees, or gain income through means other than wages and salary, and therefore are not considered part of the local workforce. Most have come from outside of Brenham and some have moved from other states around the country.



## Oak Alley

Oak Alley is a gated, custom home development with 46 total lots built in four phases. Five lots have completed homes custom homes with 40 lots remaining. Oak Alley is unique in that it offers amenities not normally allowed by city ordinances, such as 75% lot coverage (normally only 55% by City of Brenham). This allows more space for the residence, garage, walkways, and drives, creating more entertaining and parking areas for guests. Lot prices go from \$60,000 to \$80,000.



All lots are designed with a setback or side entrance garage. Front entrance garages are not approved. Homes are custom built and therefore price and size are decided by the buyer and range \$400,000 to \$800,000

Phase 1 consists of only ten (10) larger home sites. Minimum square footage on 8 lots is 2800 sq. ft. living area. Two lots with narrow frontage require a minimum of 2500 sq. ft. living area. Although this is the minimum, many homes will exceed that and could be as large as 6,000 sq. ft. and up.

These home sites will be entered from a private drive, Carondelet Court, situated off of Mustang Road.

Phases 2, 3 and 4 will feature front porches or have courtyard entrances.

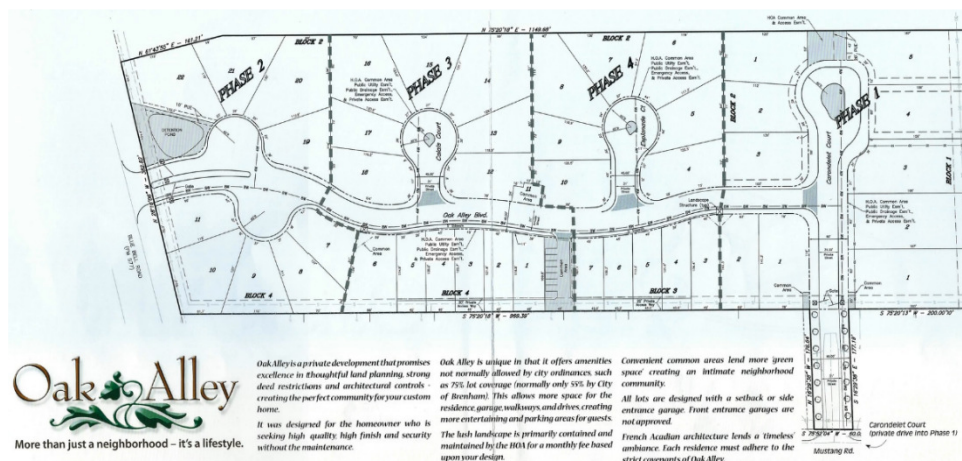
A total of 23 lots are nestled on 4 cul-de-sacs. These standard sized lots allow a minimum of 2200 sq. ft. of living area, but could range to 3500 sq. ft. or larger.

Phases 2 and 3 also include 11 garden home sites reminiscent of the French Quarter Creole cottages. All will face Oak Alley Boulevard with a sidewalk across the entire front.

These home sites feature a rear alley in which to access their garages. This allows additional parking for guests in the alleyway access, as well as in the common areas along the boulevard.

While the minimum square footage is only 1800 sq. ft., some lots could accommodate 3500 sq. ft. or more. These sites appeal to young professionals and singles.

As previously mentioned almost all buyers pay in all cash, are retirees, business owners or have passive income and most are re-locating to Brenham from places in Texas and also from various states around the country.



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### Arm River Builders

Arm River Builders is a custom homebuilder that specializes in acreage home sites in and around Washington County. The owners live in the Brenham area.

Arm River Builders offers in-house assistance with architectural design, interior selections, rural utility options and all the other issues that must be addressed during the construction process. They provide, fixed price contracts, avoid change orders and specialize in Texas Farmhouses in the Brenham Area

Prior to COVID Arm River was actively acquiring existing lots located in the city and building spec, pier and beam starter homes priced in the \$125,000 to \$145,000 price range, pictured below.



Starter homes were mostly being purchased by entry level, first time, local worker households until 2020 when buyers of these homes transitioned to single professionals working remotely outside of Brenham as well as retirees and empty nesters.

Starter home building activity became less feasible once lot prices began to increase from around \$5,000 to \$10,000 to \$20,000 and at the time of this study were in the \$30,000 to \$50,000 range. Increased lumber prices also has made building starter homes in the \$150,000 to \$200,000 range impossible. Lumber prices have gone down since this interview took place, yet land and labor costs still remain elevated and may remain so for the next several years.

In the past two years homes that were made available sold within a week. Three starter homes were rented out in the \$1,250 to \$1,350 per month price ranges.

Arm River’s goal was to build six starter homes for-sale and 4 single-family rentals in Brenham each year. There is a fear that acquiring more city lots will not be feasible due to extremely high lot prices.



## **Future Single-Family Demand**

### *Planned/Proposed Single-Family*

The market for new housing in Brenham is strong, but the increasing costs for national, large production builders as well as local individual builders has paused any information from them on future development in Brenham.

They are building out their current phases and planning to complete future phases, but speed of development and prices will be determined on a house by house basis depending on many various factors.

All builders currently active in Brenham would like to purchase more land and build more new homes but are waiting to see how COVID related impacts will shape the market going forward.

In total there were more than 700 combined total single-family lots in various phases of development and vertical construction at the time of this report.

Since 2011 there have been 3,220 total single-family homes sold in Brenham, an average of about 300 per year.

This gives the estimated 700 single-family lot inventory about a one and a half year supply of new single-family homes in Brenham if no new lots were developed.

Additional consideration should be given by developers for a diversity of housing types in Brenham and specifically within a master planned subdivision. The City currently allows for use by-right in the Mixed Residential Zoning District (R-2) a variety of housing products including patio home, garden home, townhome and duplex housing types. While vacant land zoned R-2 is sparsely located in Brenham, the City should promote rezoning additional land for the development of more dense mixed residential housing. CDS has observed that these are the fastest absorbing new product in new master planned communities around Texas due to their lower price than a traditional large lot single-family home. Lot sizes of 25'-35' would allow builders greater flexibility to create new homes at lower prices than other wise achievable on a 50' or 55' lot.

Furthermore, Stylecraft has confirmed the projected popularity, overall feasibility and therefore demand for a diversity of housing products with the Vintage Farms Subdivision Planned Development District zoning. The master plan includes two phases with less than 50' wide lots. One phase will include the development of 57 townhomes and in a subsequent phase the development of 10-20 patio homes. Stylecraft has received very high interest in both products from prospective buyers in Brenham.

### *Supportable Future Single Family Development*

It is of the opinion of CDS that the City of Brenham has demand for at least 50 to 75 or more new single-family homes per year over the next two years.

The prices in greatest demand are lowest priced two and three bedroom homes priced \$160,000 to \$240,000 as well as larger three and four bedroom homes in the \$250,000 to \$380,000 price ranges.

This would satisfy demand from lower and middle income worker and worker family households as well as higher income retirees and remote workers.

Figure 70: Existing Single-Family Properties



### Affordable Single-Family Demand

The estimated 2019 ACS median household income in Brenham was \$45,197. The correlating maximum affordable home price to Brenham’s median household income was about \$140,500.

Estimation of affordable home purchase prices is more involved than for rental housing, and requires additional assumptions regarding the type of mortgage, interest rates, property taxes, and other expenses such as property insurance.

As of 2019, the vast majority of first-time home buyers in moderate price categories are utilizing programs such as Federal Housing Administration (FHA) mortgage insurance, which reduces the required down payment to as low as 3.5% of purchase price.

The following tables describe an FHA mortgage scenario and other assumptions to arrive at the income levels needed for an estimated monthly housing cost below the 30% standard.

Although most home buyers in Brenham in the past several years are mostly cash or conventional, the FHA model is used because it best describes incomes and correlated affordable home prices for lower and middle income worker households in Brenham.

The calculations indicate that a first-time home purchase for households with incomes under the median of \$45,000 is likely unrealistic as new for sale homes priced below \$200,000 does not appear feasible without significant financing and cost reduction incentives for developers and builders. Also, this analysis does not consider that potential buyers may have other current debt that effectively reduces their qualifying income.

#### Brenham FHA Low Down-Payment Mortgage Assumptions

2021 Tax Rates		
Taxing Entity		
Brenham ISD	\$0.9884	
City of Brenham	\$0.4940	
Washington County	\$0.5032	
Blinn College	\$0.0513	
<b>Total</b>	<b>\$2.0369</b>	
Down Payment	3.50%	of home price
Closing Costs	4.00%	of home price
FHA UFMIP	1.75%	of loan amount
Annual Mortgage Insurance	0.85%	of loan amount
Avg. Mortgage Rate	3.39%	per year
Mortgage Term	30	years
Insurance	\$1,500	per year
Affordability Standard	30%	of gross income
Credit Score (Texas Average)	656	

Source: CDS

**Table 71: Brenham Affordable For-Sale Home Price Calculation (FHA Mortgage)**

Home price	\$150,000	\$160,000	\$180,000	\$200,000	\$250,000	\$275,000	\$285,000	\$300,000	\$325,000	\$350,000
Down payment	\$5,250	\$5,600	\$6,300	\$7,000	\$8,750	\$9,625	\$9,975	\$10,500	\$11,375	\$12,250
Closing costs	\$6,000	\$6,400	\$7,200	\$8,000	\$10,000	\$11,000	\$11,400	\$12,000	\$13,000	\$14,000
Total up-front costs	\$11,250	\$12,000	\$13,500	\$15,000	\$18,750	\$20,625	\$21,375	\$22,500	\$24,375	\$26,250
FHA Loan amount	\$147,283	\$157,102	\$176,740	\$196,378	\$245,472	\$270,019	\$279,838	\$294,566	\$319,113	\$343,661
Monthly mortgage	\$658	\$702	\$789	\$877	\$1,097	\$1,206	\$1,250	\$1,316	\$1,425	\$1,535
Monthly MIP	\$104	\$111	\$125	\$139	\$174	\$191	\$198	\$209	\$226	\$243
Monthly home insurance	\$125	\$125	\$125	\$125	\$125	\$125	\$125	\$125	\$125	\$125
Monthly taxes	\$255	\$272	\$306	\$339	\$424	\$467	\$484	\$509	\$552	\$594
Total PITI with MIP	\$1,142	\$1,210	\$1,345	\$1,481	\$1,820	\$1,989	\$2,057	\$2,159	\$2,328	\$2,498
<b>Required annual income</b>	<b>\$45,674</b>	<b>\$48,385</b>	<b>\$53,808</b>	<b>\$59,231</b>	<b>\$72,789</b>	<b>\$79,568</b>	<b>\$82,280</b>	<b>\$86,347</b>	<b>\$93,126</b>	<b>\$99,905</b>
Required monthly gross income	\$3,806	\$4,032	\$4,484	\$4,936	\$6,066	\$6,631	\$6,857	\$7,196	\$7,761	\$8,325
Hourly wage equivalent	\$21.96	\$23.26	\$25.87	\$28.48	\$34.99	\$38.25	\$39.56	\$41.51	\$44.77	\$48.03

Note: Hourly wage rate based on 2,080 hours/yr.

The lack of new market rate multifamily apartment rentals has pushed those seeking housing in Brenham to rely primarily on the single-family home market as the source for market rate rentals as well all levels of homeownership from entry level middle income workers to retirees and remote workers relocating from elsewhere.

This has increased the prices of the oldest existing two and three bedroom homes, all of which need updating and some level or repair, to the \$160,000 price point.

This has caused local worker households to find market rate rental and for-sale housing outside of Brenham which leads to retail and property tax leakage of local workers spending their wages and adding to the tax base of communities outside of Brenham.

More than half of existing homeowners in Brenham had no mortgage which could indicate that a disproportionate share of owners in Brenham have been there for 30 years or more or purchased homes with cash, being retirees or independently wealthy. However, just in the past five or so years Brenham's population and local workforce has grown, yet new housing production has not kept pace with that growth.

Since 2011 homes sold in the lowest two price bands of \$160,000 and less shrank sales share from 57% of sales in 2011 to 16% of sales in 2020.

At the time of this report the lowest new entry level single-family homes were selling in the \$250,000 to \$300,000 range.

Surrounding single-family home markets in Bryan, College Station, Waller County, Harris County and other small communities in Washington County appear to be supplying new for-sale and rental housing that is accommodating Brenham workers.

Many of these locations result in an average roundtrip commute of 80 miles a day averaging 45 minutes to an hour each way. Although traffic congestion may be less frustrating than in a larger city, it still is expensive and time consuming, and at times can be dangerous. In addition, many employers have stated that the lack of new rental and for-sale housing production in Brenham at prices their workers can afford hurts hiring and retention.

Based on LEHD 2018 data shown earlier there were 12,689 total Brenham employees who work in the City. Of those workers 76% (9,363) lived outside of the City of Brenham.

Brenham Independent School District, Blue Bell, Baylor, Scott, White Hospital and Clinics, Blinn College and many other large employers interviewed for this study stated they had workers living outside of the City and would benefit from having more rental and for-sale housing options in Brenham.

Workers from these employers had incomes from all ranges from \$20,000 to \$100,000+ and all said that multifamily apartment and single-family rental units and single-family for-sale homes for those making around the median income of \$45,000 were in greatest demand and lowest supply for their workers.

The custom home market in Brenham appears to be satisfying demand for homes priced \$400,000 and above. There were some in the real estate community that stated there seemed to be a gap of available non-custom move up homes in the \$350,000 to \$450,000 price ranges.

Stylecraft and D.R. Horton are in development of more than 700 new single-family homes in Brenham with the lowest priced homes selling for \$250,000 at the time of this report. However, these lowest priced homes are also being bought by non-worker households, most with large down payments of 20% or more who can outcompete first time home buyers who make up a sizable share of local middle income worker households seeking to buy a home in Brenham.

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## Key Points of Single-Family Analysis

Regardless of the condition of existing single-family homes and neighborhoods, a low supply of newly constructed market rate rental units in the past 20 years for working and middle income families in combination with the recent COVID induced influx of new higher income residents and retirees has placed tremendous pressure on Brenham's single-family for-sale home market.

This along with sharp increases in land, material and labor costs has increased the prices of what would typically be considered new single-family entry level or starter production homes from D.R. Horton, Stylecraft and local infill builder Arm River.

These factors have created a housing market where demand for all but the highest priced custom built homes now outpaces supply.

This housing market dynamic has pushed prices of the oldest, least maintained homes to be overvalued with regard to their actual age and condition.

Land and lot prices have risen very sharply in the last three years, in some cases going from \$5,000 to \$10,000 per lot for vacant residential lots in the City limits to \$30,000 to \$80,000.

Proactive guidelines for support for the construction of new housing on the part of the City and possibly County could provide financial or other types of support to encourage builders to get new product on the ground in Brenham, while lowering lot development costs and therefore lowering risk.

Lowering finished lot costs and constructing smaller more efficient houses can possibly get new housing in the \$180,000 to \$200,000 price ranges in addition to building on existing, utility served vacant infill lots.

Builders noted that they must negotiate a planned development district with the City in order to build homes on lots smaller than a 7,000 square foot lot (typically 55' x 130' or 60' x 120'). Stylecraft noted very high interest and demand for their new townhomes in Vintage Farms on 3,600 square foot lots (30' x 120').

Stylecraft townhomes are the lowest priced new single-family homes in Brenham and the City should do everything in their ability to ensure builders can produce a greater supply of such homes in order to meet the demand for new housing at prices affordable to the incomes of locally employed workers.

CDS has observed new single-family lots in new single-family home developments in Texas communities as small as 25'. These are typically compact single-family housing types such as patio, garden, townhome and duplex homes.

CDS recommends that the City consider allowing builders to build on small lots from 25' to 45' on a by-right basis to help facilitate building new homes in the most in demand price ranges on smaller lots that can help offset the rising costs of land, materials and labor to get housing in Brenham that local middle income workers can afford.

Brenham appears to have ample land ripe for development of new multifamily and single-family housing.

CDS believes the construction of 50 to 75 or more new entry level single-family homes each of the next several years priced between \$180,000 to \$260,000 would be quickly absorbed. If mortgage rates increase, then required incomes for financing will increase and disqualify some middle income workers from homeownership even without an increase in home prices.

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## CONCLUSIONS AND RECOMMENDATIONS

### Demand Analysis

Estimates show that at least 12,689 employees worked at Brenham establishments in 2018. Of those employees 9,636 (76%) commuted into Brenham as they lived outside of the City.

A large portion of those who live outside of Brenham lived in Washington County, Harris County, Bryan, College Station, Waller County and other locations.

These locations have been developing or have announced new single-family housing and new multifamily apartment complexes in the past several years. Owners and renters pay the few extra hundred dollars to live there and then drive an average of 80+ miles roundtrip daily and spend 45+ minutes of drive time each way to go to and from work in Brenham.

Brenham's existing housing stock of multifamily and single-family detached housing has seen little growth in comparison to the population and jobs.

In the past five years there have been around 120 net new multifamily apartment units built in Brenham, only 16 of which were market rate.

In that same period of time there has been an estimated increase of at least an estimated 2,000 residents and 300 jobs in Brenham.

Almost all multifamily apartment complexes were occupied at 90% or more, especially market rate complexes. This indicates high demand and low supply for market rate apartments.

New single-family development has been taking place in Brenham mostly through local builders and in recent years has seen Stylecraft and D.R. Horton develop a combined total of more than 700 new lots for new single-family for-sale homes.

Due to lack of market rate rentals the single-family market in Brenham supplies the bulk of housing for local workers. However, local workers have been squeezed out of the single-family market by retirees and in the past two years a sharp influx of remote workers re-locating to Brenham. Both of these groups pay either in all cash or very high down payments of 20% or more with conventional financing which allows them to out compete local worker households with lower down payments and FHA or other government backed financing.

These factors, along with COVID related supply and labor bottlenecks, land, material and labor cost increases and increased demand for rural and exurban living, have pushed the prices of new entry level single-family homes from around \$175,000-\$180,000 to \$250,000-\$300,000.

The oldest, most affordable existing single-family homes garner a premium due to lack of supply of market rate housing in the \$160,000 range but many of these homes require substantial updating in order to meet current and emerging buyer and renter expectations.

The newest market rent apartments were constructed in 2018 but only 16 new market rate units were built. The rest of Brenham's market rate apartments, except for Cortin Village, are approaching 30 or more years old. CDS estimates that only 530 total market rate apartment units exist in Brenham.

The bulk of Brenham’s single-family homes (77%) were built prior to 2000. Many aspects of a home’s physical structure are only rated to last up to 30 years. In addition, deterioration of insulation and other components of older existing homes impacts their energy efficiency and increases utility costs for residents which especially hurts those making below the median household income in Brenham.

The available inventory of attractive market rate multifamily rental units is extremely low, and all market rate properties show their age from a design, amenity and curb appeal standpoint. It is only the two newest LIHTC apartment complexes, Parklane Villas and the age restricted Belle Towers that appear to be new, but when prospective tenants call, they discover middle income workers make too much to qualify or are not old enough.

Brenham needs new market rate multifamily apartment and single-family rental units. Based on the high share of local workers living in communities outside of Brenham with average market rate prices in the \$1,100-\$1,200 shows that Brenham workers can already afford those prices and survey responses show that if the same rental housing was available in Brenham they would choose to live in Brenham!

The 2019 ACS median household income in Brenham was \$45,197, \$60,347 for owner households and \$23,750 for renter households. This shows that renters have much lower incomes in Brenham than owners. Although property tax is the main supporter of City property tax revenue, residential and all other taxes and sales expenditures are being lost to other Cities, as well as the intangible factors of a cohesive growing city. In the opinion of CDS this is due to the lack of a sufficient supply of attractive and attainable market rate rental units available in Brenham for locally employed middle income workers, recent college graduates, and relocating managers/executives.

Income Type	Income	Rent	For-Sale
2021 PCensus Median Household Income	\$53,075	\$1,327	\$177,500
2Q2020 QCEW Washington County Avg. Weekly Wage	\$50,076 / \$963	\$1,250	\$166,000
2019 ACS Brenham Med. HH Income	\$45,197	\$1,130	\$148,000
2019 ACS Owner Median Income	\$60,347	\$1,500	\$204,500
2019 ACS Renter Median Income	\$23,750	\$600	\$69,500



### *Multifamily Rental*

The average multifamily rent for the 530 market rate units surveyed is between \$750-\$850 (\$0.90-\$1.10 per square foot) for an average 900 sf. apartment unit. CDS estimates that only 530 total market rate apartment units exist in Brenham.

Complex and units are an average of 30 years old with minimal property amenities. No market rate complex had any substantial amenities other than a pool. With upwards of 90% of apartment units occupied, it can be challenging for some renters to find an available unit that suits their preferences. Rental houses are also hard to get as they are rarely on the market for more than a few days. Single-family rentals are Brenham's primary source of market rate rental units with an estimated supply of about 1,541 single-family rental units.

Brenham has a growing base of workers who would likely be interested in newly constructed or updated market rate apartment units at similar prices (average of \$1,150) that they currently pay for in units located outside of Brenham.

Blinn students live mostly on campus, but some market rate single-family and apartment land lords said they do rent to students in certain cases. Officials at the university claimed that more dense single-family housing such as patio home, garden home, townhomes, duplexes and multiplexes in neighborhoods surrounding campus is much needed to house additional university workers. This would also greatly support school district as well as healthcare, hospital and clinic workers.

With 76% (9,636) of Brenham's 12,689 employees living outside of the City, there is a demand for new market rate apartment units from local middle income workers.

CDS believes there is at least an initial demand for 150-200 new market rate one and two bedroom multifamily apartment rental units in Brenham with pricing close to what is paid at market rate units in areas they currently live at an average monthly rental rate of \$1,150 per month.

There was also minimal demand for higher-end luxury apartments. Thirty to 40 units in an access restricted property with upscale finishes, with a garage, and landscaping would likely be popular as well for higher paid workers relocating to Brenham from larger metros. This could be accomplished by activating existing second floor downtown rental units as well as a supply of new downtown rental housing units. A more diverse lifestyle-driven housing stock will likely appeal to professionals and entrepreneurs and would likely aide in economic development efforts.

In talks with downtown property owners there appeared to be demand but some barriers to activating existing supply due mostly to fire suppression requirements. The City showed interest and acumen towards property owners navigating fire suppression and other downtown housing building requirements.

There is always demand for income restricted units, as the household income and housing cost burden household figures point. That data showed nearly 1,000 cost burdened renters in Brenham. At least an additional 50 to 100 subsidized income restricted units with some reserved for seniors will do well in Brenham. With retirees snapping up such a large share of market rate housing, any age-restricted housing will divert some of that market away from potential workforce housing and should be aggressively promoted.

Rental patio, garden, townhomes or duplexes should also be part of the solution to satisfying middle income local worker renter demand for those not willing to reside in apartment units. These kinds of units could be built in a housing development project with single-family rentals as well as multifamily rentals with lease rates comparable to existing single-family rentals. Garage apartments and ADU's (Accessory Dwelling Units) can also be a strategy to encourage infill densification. Some cities have garage apartments that get listed as vacation rentals, and that's not a bad thing if it siphons some of the vacation rental demand away from the regular housing stock.

They also can provide more single-family rental stock without taking eligible single-family ownership supply out of the for sale market, and to allow for less pressure on new entry level homeowners. These types can provide some amount of private or semi-private yard space for kids and pets. The patio, garden, townhome, duplex and fourplex housing type existing in Brenham were very popular and had high occupancies and very long tenured residents.

It is the opinion of CDS that a newly constructed market rate apartment complex of 150-200 more or less units could be quickly supported at average prices of \$850-\$1,200 per month in Brenham based on the level of current and continued demand from workers at existing local employers.

### *Single-Family For-Sale*

The resale single-family detached market in Brenham is a sellers' market. Housing inventory is only 1.6 month and the most popular price range at the time of this study was \$240,000-\$279,999 and \$400,000 and greater.

About 300 houses sell each year in Brenham and new single-family housing supply in the past three years has gotten a boost with a total combined of 700 new single-family lots entering into second and third phases of development from Stylecraft and D.R. Horton. However, these homes are currently selling at a slower velocity than normal due to very high demand and land, materials, and labor shortages and price increases. These factors have increased the intended price of these new single-family homes up from \$175,000-\$200,000 to \$250,000-\$300,000 putting them out of reach for many locally employed middle income earners.

Most of the existing houses were built before 2000 and many have never been upgraded. For many local worker households, it is easier to rent or buy according to their preference in areas outside of Brenham than trying to find an older home in Brenham to rent or buy and then budget for repairs, updates and rehab.

That said there are a large number of households that would prefer to live in Brenham. Our survey shows that the positive attributes of Brenham such as its small town family friendly atmosphere, lower traffic congestion and ability to live where you work, outweigh the negatives.

It is hard to find a perfect home in Brenham at the moment, particularly if you don't want to buy and then remodel and update. In June 2021 there were 46 homes listed for sale.

With costs increasing for land, materials and labor going forward the existing sub \$200,000 price range will likely make up a stock of homes considered to be investment or "fixer upper" properties only.

As new entry level homes in the community are built in \$250,000-\$300,000 and up this should provide comps that will show lower priced homes have been sold for a somewhat overvalued premium that was elevated due to a lack of new supply.

Based on LEHD data shown earlier there were 9,636 Brenham employees who work in the City but live outside. As examples:

- Brenham Independent School District, Baylor, Scott, White, Blue Bell, QuestSpecialty, and Blinn College, and apartment property managers all stated they had workers living outside of the City.
- Workers from these employers had incomes from all ranges from \$22,000 to \$100,000+ and all said that market rate apartment and single-family rental homes were in greatest demand and lowest supply for these workers.

The high end move up market has been satisfied by several of Brenham's local custom home developers and builders. Homes in the \$400,000 and greater price ranges are being paid for in all cash by retirees, passive income households, business owners, out of towners and re-locating remote workers.

The main focus for new housing production should be lowest possible priced single-family homes for entry level, first time home buyer and middle income workers as well as market rate apartment rental and single-family rental units for middle income and higher paid workers seeking to rent before buying or as a new hire.

Proactive guidelines for support for the construction of new housing on the part of the City and possibly County could provide financial or other types of support to encourage builders to get new product on the ground in Brenham, while lowering lot development costs and therefore lowering risk.

The City could consider programs to ensure the lowest priced homes are bought by local worker households by creating housing partnerships, marketing and buying programs between local employers, home builders and the real estate and banking community. Also, the City and County may consider a down payment assistance and/or soft-second mortgage program for locally employed buyers to help ensure their ability to own a home affordable to their income in Brenham as long as required application and approval process are not overly onerous, lengthy and risky.

Other considerations could include partial development reimbursement for street, curb, gutter, sewer and other infrastructure and utility costs related to new housing development and construction.

Lowering minimum regulations for street width and lot size as well as relaxing single-family zoning regulations and restrictions to allow greater flexibility and ease of housing production are low to no cost ways the City could make new market rate housing less costly for developers and builders.

Developers, builders and many consumers want smaller lot homes due to their inherent lower cost and sale price and lower utility and maintenance costs. Stylecraft has agreed with the City to build a townhome pod in their development through a planned development agreement. This is due to very high customer interest and demand for compact single-family homes in Brenham.

Allowing for the legalization and ease of smaller lot housing types will lower costs and prices for new housing in Brenham while also allowing more residents per acre to accommodate population and job growth without requiring maximum amounts of land. It should be noted that land costs have risen

sharply and has slowed the process of planning future new home development in Brenham beyond currently owned lot inventories.

CDS believes the construction of 50 to 75 or more new entry level single-family homes each of the next several years priced between \$180,000 to \$260,000 would be quickly absorbed. If mortgage rates do not remain low then required incomes for financing will increase and disqualify some middle income workers from homeownership even without an increase in home prices.

## APPENDIX A: EMPLOYEE SURVEY

In order to document housing needs and preferences of the local workforce in Brenham, CDS prepared a housing survey of employees at Brenham area employers. It includes questions about the respondents' current housing, recent housing search experience, desired types and price of housing, residential location options, and a set of demographic questions.

The survey instrument is attached as Appendix B.

### Survey Design and Sampling

While many questions in the survey apply generally to most workforce housing markets, CDS adapted several questions to be specific to factors affecting housing choices in Brenham. This helped CDS incorporate the subjective aspects to the local housing market into its analysis.

The survey was conducted online thanks to the cooperation of local employers accommodating their Brenham workers to take time to respond to the survey.

The sampling approach was not random or statistically structured; however, the objective was to obtain as large a sample as possible. City of Brenham, County of Washington, Brenham Washington County Economic Development, and the Washington County Chamber of Commerce and the Brenham Economic Development Foundation and other organizations distributed the survey to a number of local employers. The employers then provided the survey to their workers. Respondents and their employers remained anonymous. Ultimately, at least 622 respondents started the survey.

In terms of the profile of respondents, the survey takers and therefore responses were more weighted toward workers with high educational attainment and annual incomes than is reflected in the overall population of workers in Brenham.

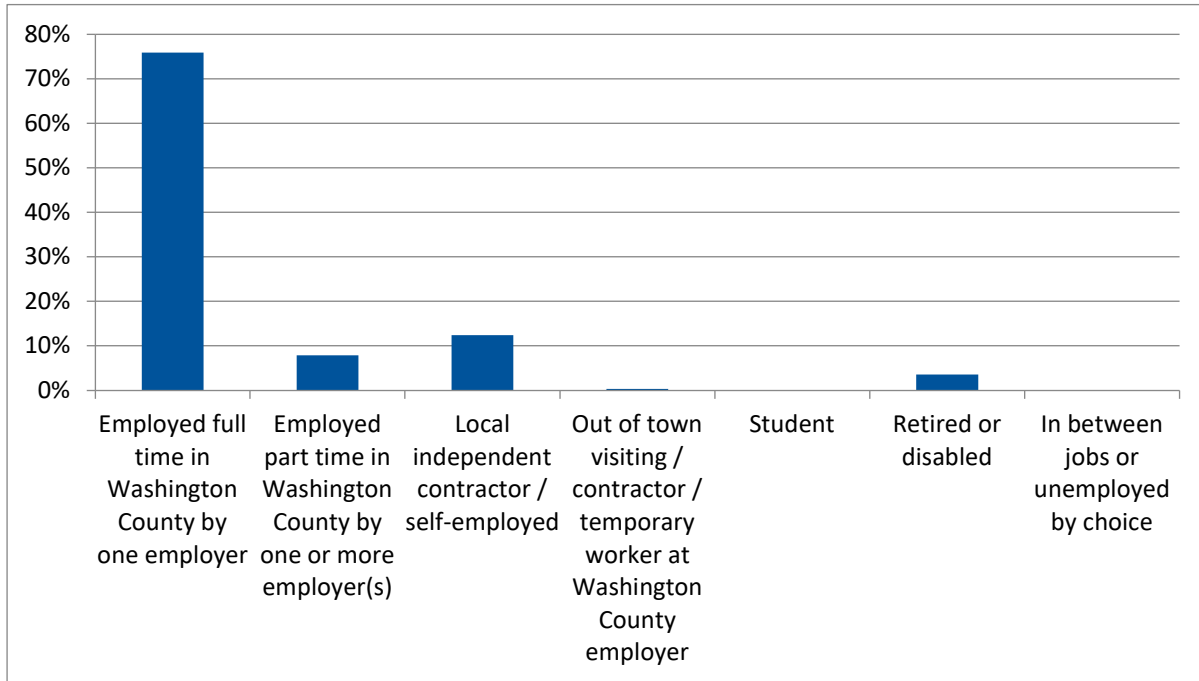
## Notable Survey Findings

- Out of all respondents
  - \$0-\$49,999 – 81 respondents
  - \$50,000-\$99,999 – 194 respondents
  - \$100,000-\$300,000+ – 257 respondents
- The results are biased to those making \$50,000 and greater.
- Incomes \$50,000 and greater tend to represent college educated, higher earning households that are most likely to express housing demand for for-sale housing priced \$200,000 and greater or rents \$1,250 and greater.
- Respondents could be generally categorized as mostly long time Brenham workers who owned a single-family home, paid \$750-\$1,499 on housing a month.
- Limited entertainment and family activities, housing options, housing prices, limited shopping, limited dining places were things respondents liked least about Brenham.
- Entry level subdivisions, master planned communities, and preserving and rehabbing / renovating existing lower cost and older housing were the three most important changes needed for Brenham housing.
- \$750-\$1,499 was the most common amount respondents were willing to spend on their next home in Brenham.
- Size/number of bedrooms, price and monthly payment were most important housing factors.
- A 3 or 4 bedroom home was most desired next residence.

## Survey Results – Individual Questions

### 1. What best describes the employment status for your household's primary income provider(s)? (check one)

Almost 80% of respondents were employed full time by a single employer in Brenham/Washington County showing the results of this survey will match well to Brenham's workforce housing needs and desires.



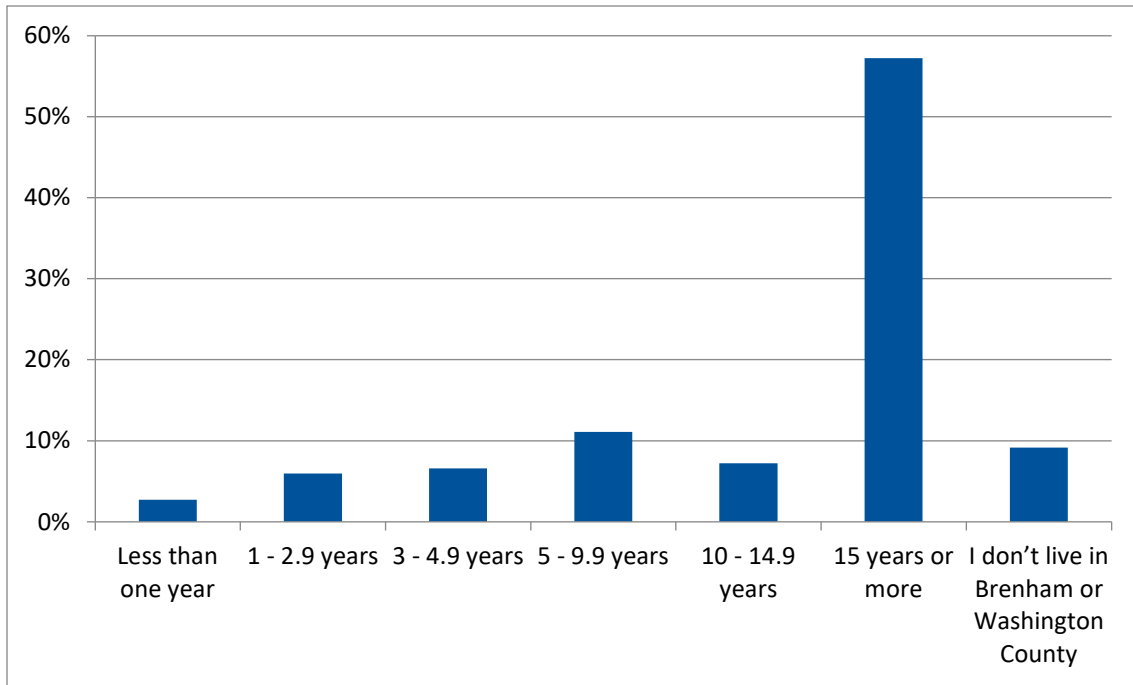
N=622

Of the 88 renters who responded only two renters said they were retired or disabled, the other 86 were employed fulltime in Brenham.

81 respondents said they made less than \$50,000 per year, of those 75% were employed full time.

## 2. About how long have you lived in Brenham or Washington County?

Almost 60% of respondents have lived in Brenham 15 or more years showing most respondents have a long tenure in the City.

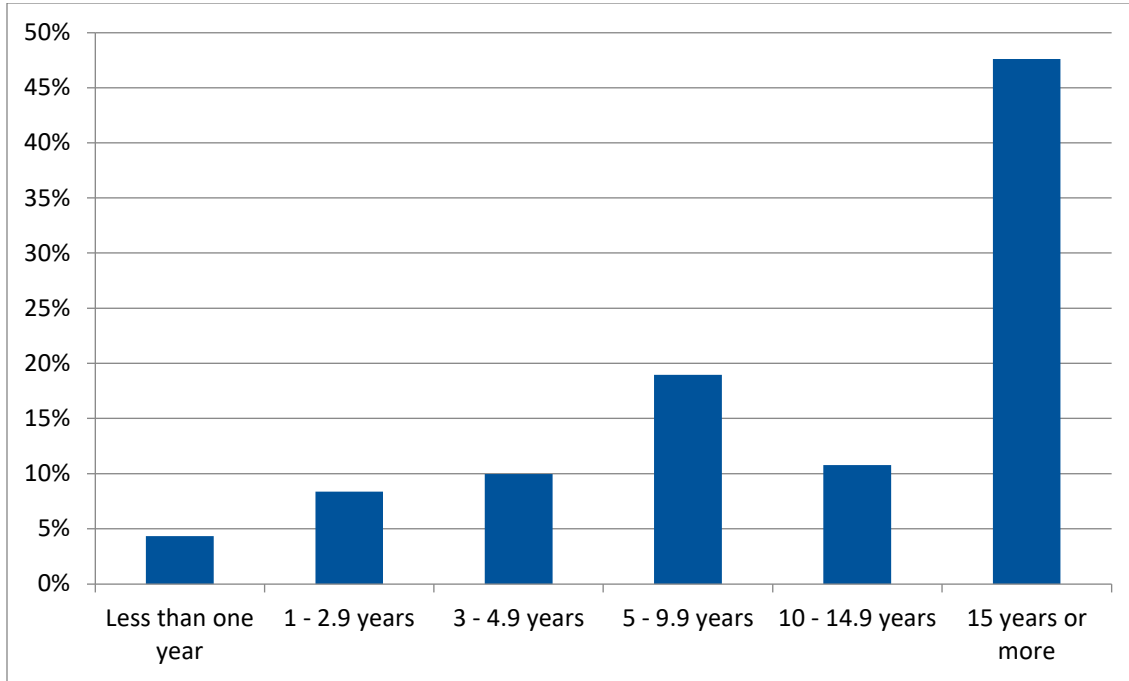


N=622



**3. About how long have you worked in the Brenham area? (check one)**

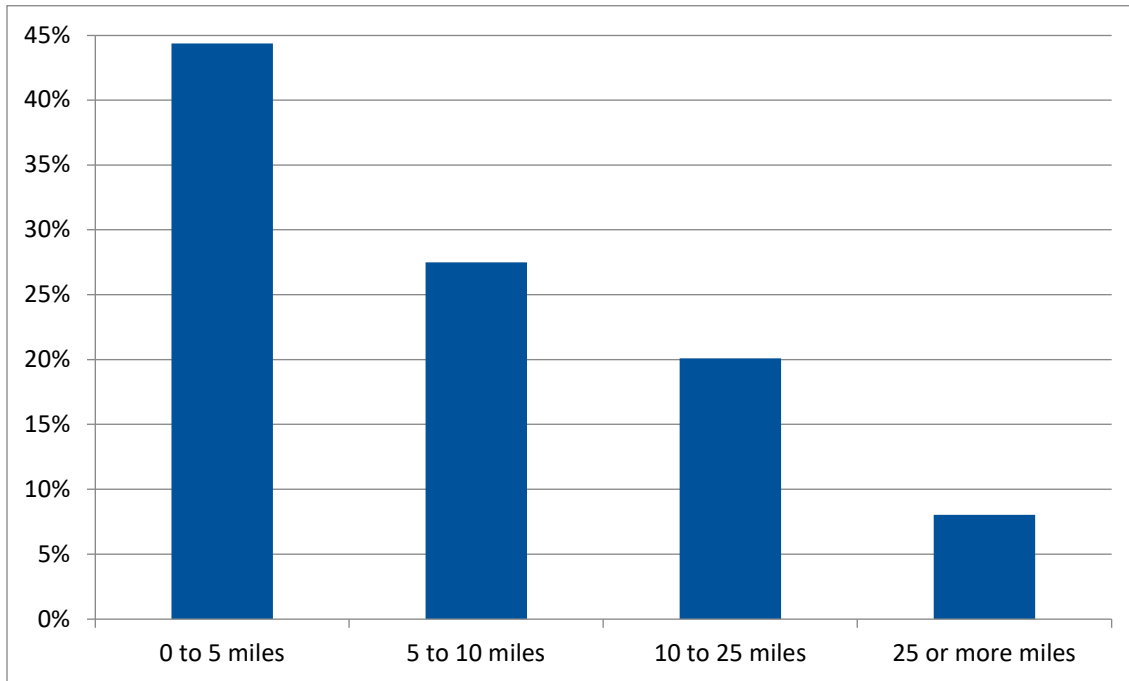
Almost 50% of respondents have worked in the Brenham area for 15 or more years.



N=622

**4. How far do you commute to work each day? (check one)**

About 45% said they commute 0 – 5 miles for work each day. The remaining 56% commuted 5 or more miles. LEHD data showed that 76% of Brenham workers in 2018 lived outside of Brenham.

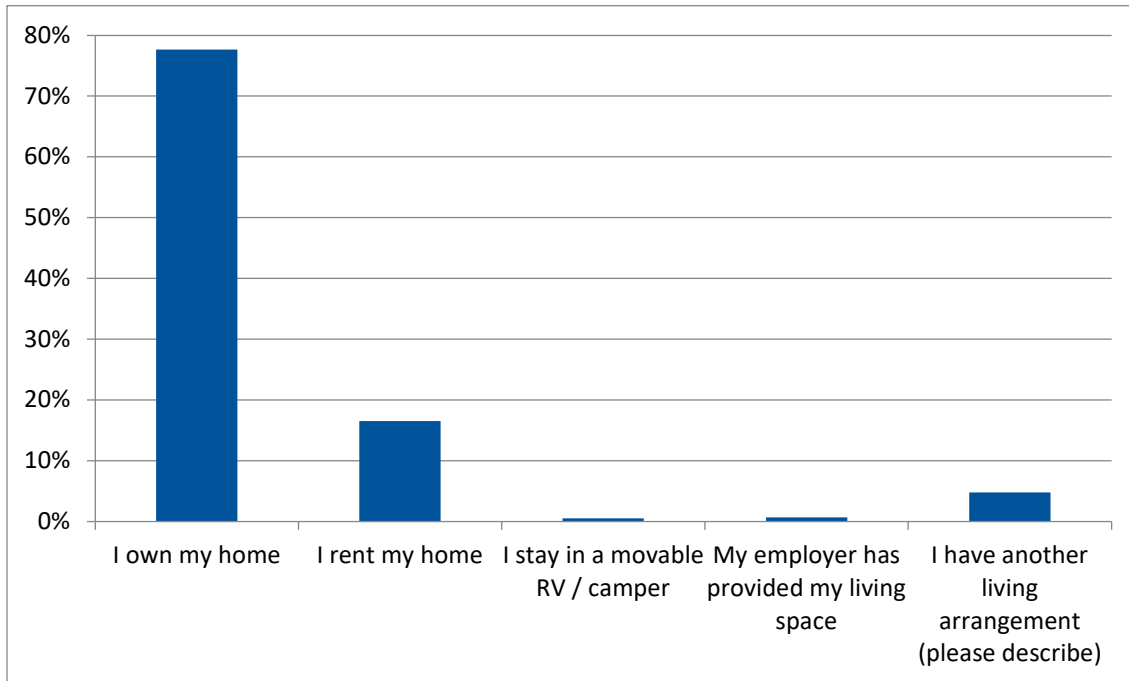


N=622

Almost 55% of respondents who said they made less than \$50,000 commuted 5 to 25 miles.

**5. What is the way you have secured housing at the present time?**

Almost 80% said they owned their home. This can be expected with an outsized portion of respondents being college educated with moderate to high incomes.

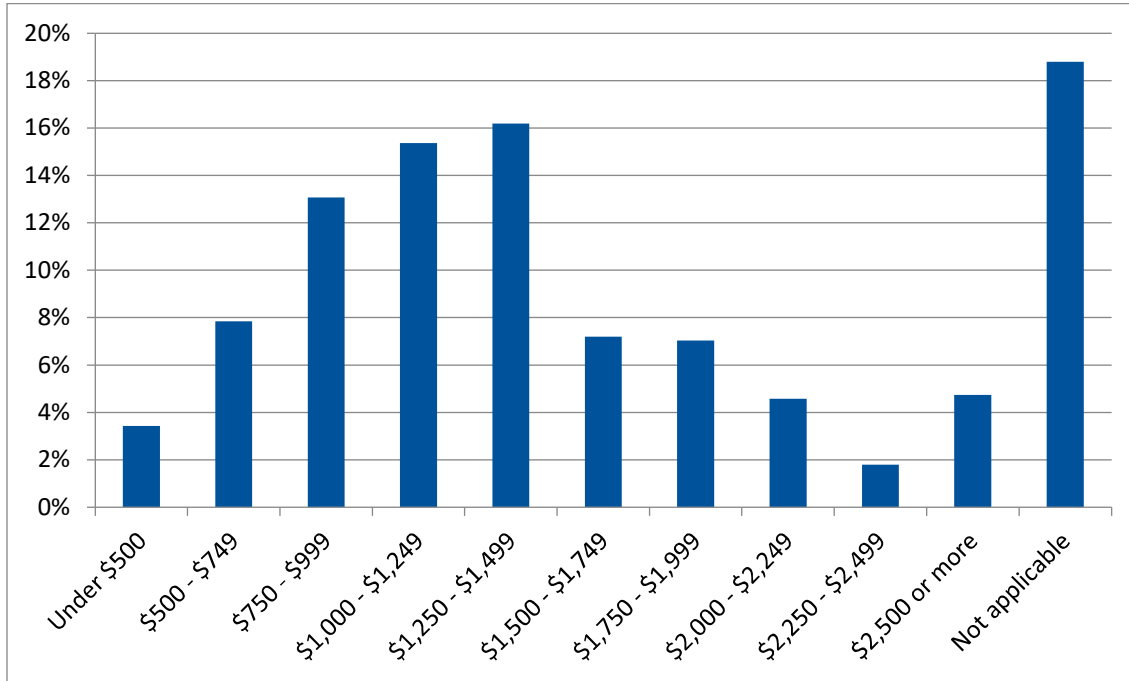


N=612

More than 50% of respondents making less than \$50,000 owned their home.

**6. What is the typical amount of your household's monthly mortgage or rent payment?**

Almost 20% said not-applicable, likely due to the fact that they own their home and have paid off the mortgage. 2019 ACS data showed that more than 50% of owners had no mortgage.



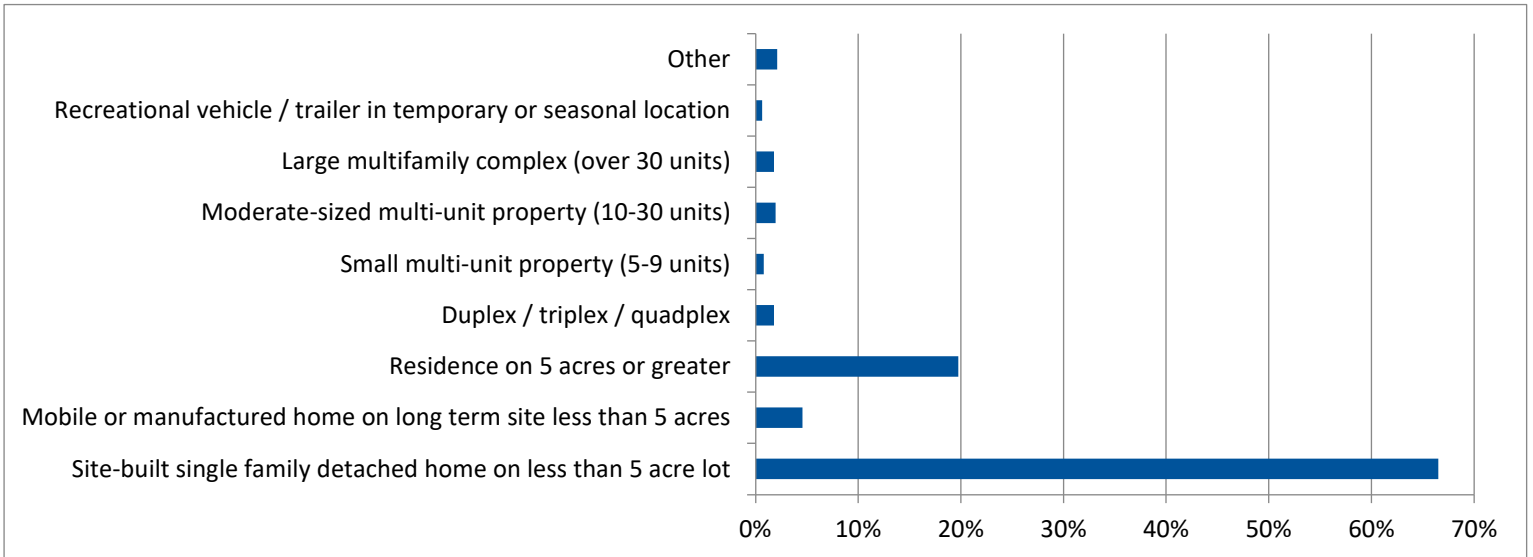
N=612

50% of renter respondents said they paid \$1,000-\$1,499 per month, and about 35% of renter respondents paid \$500-\$999 per month.

More than 20% of less than \$50,000 income respondents said they had no mortgage.

**7. Please describe the physical structure of your current residence (pick one):**

About 65% owned a site built single-family detached home followed by those with a home on 5 or more acres.



N=612

About 60% of renter respondents said they lived in a single-family rental. This again reinforces the outsized role that the single-family home market plays as the overwhelmingly primary source of market rate rental housing in Brenham.

**8. Please state the 5-digit ZIP code of your current residence:**

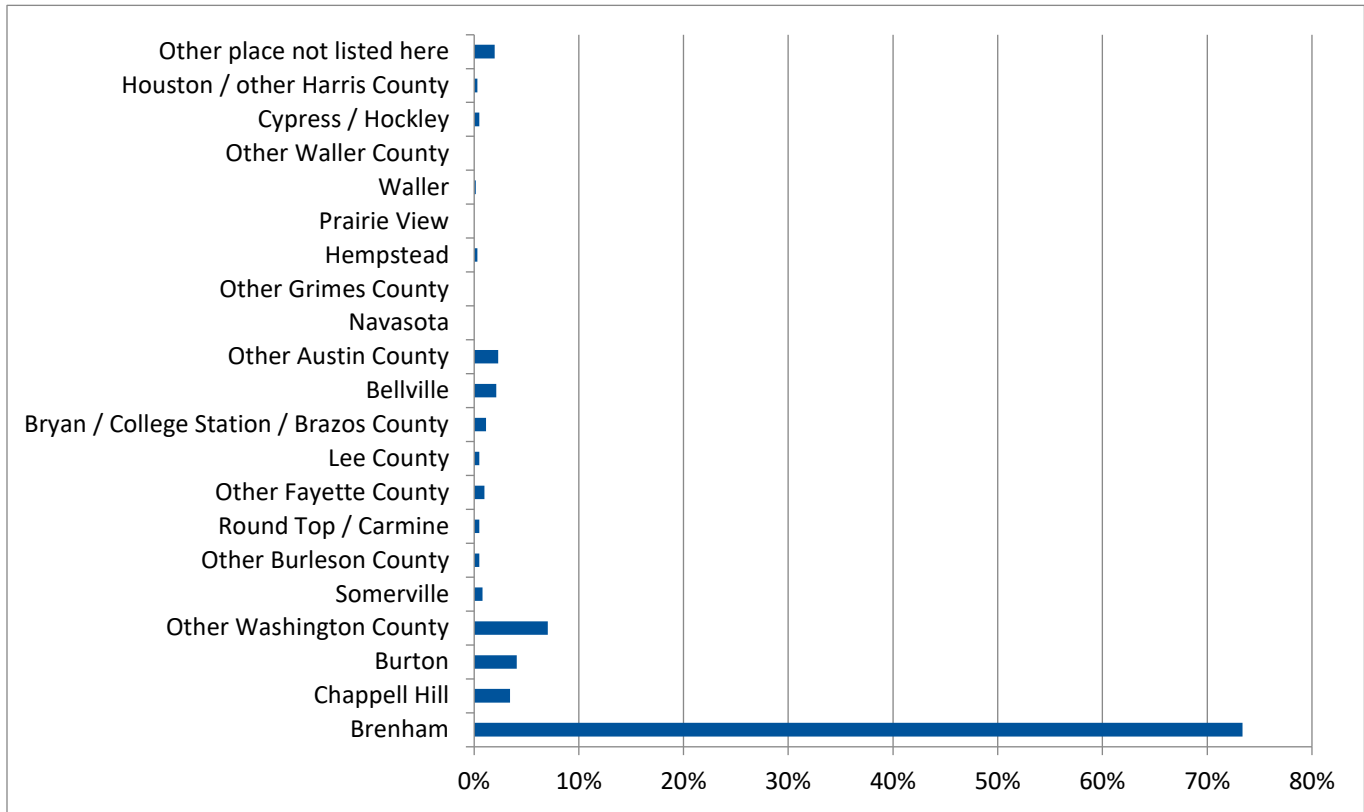
As shown from earlier questions a very large share of respondents live in Brenham.

ZIP Code	Respondents
77833	484
77835	24
77426	20
77418	13
77880	11
77879	6
78950	6
77940	4
77845	4
78944	4
78932	3
77355	3
77445	3
77474	3
77801	2
77836	2
78931	1
75068	1
75701	1
77084	1
77095	1
77354	1
77429	1
77433	1
77447	1
77484	1
77494	1
77803	1
77834	1
77853	1
77855	1
77856	1
77856	1
78933	1
78934	1
78954	1

N=612

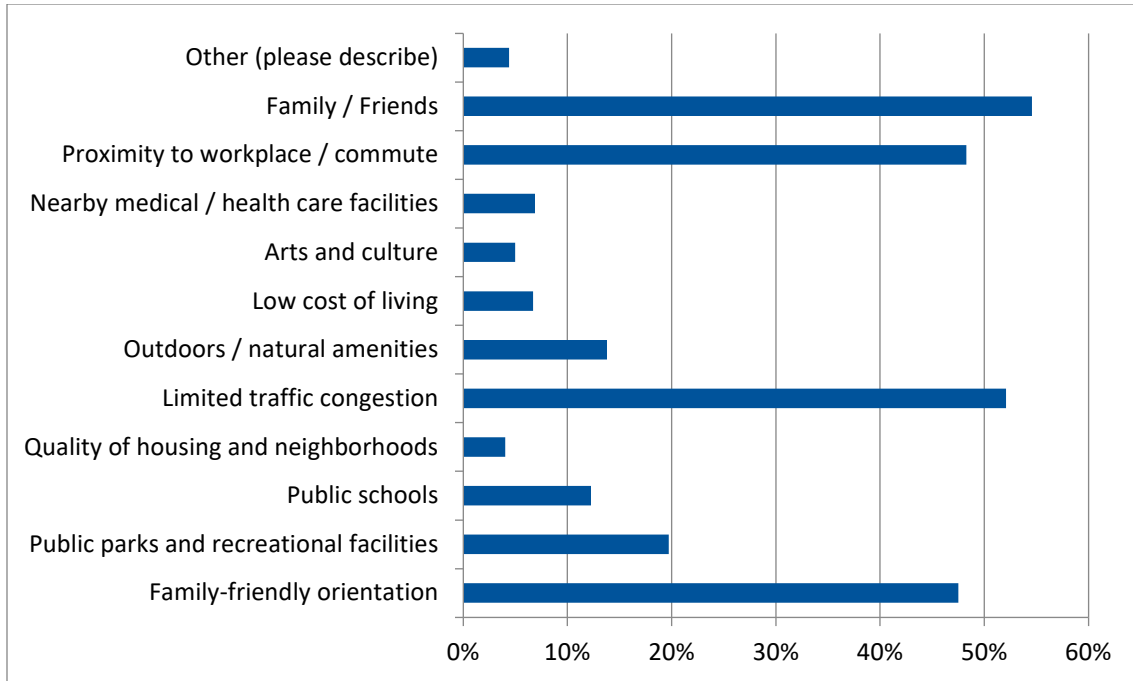
**9. Where do you currently live while working in Washington County?**

73% of respondents lived in Brenham followed by Washington County, Burton and Chappell Hill.



N=612

**10. What do you like best about living in Washington County? (Choose UP TO THREE things)**



For those respondents who stated they reside in Brenham, their family / friends, limited traffic congestion, family friendly orientation and proximity to workplace / commute were the most appealing aspects of the community.

N=522

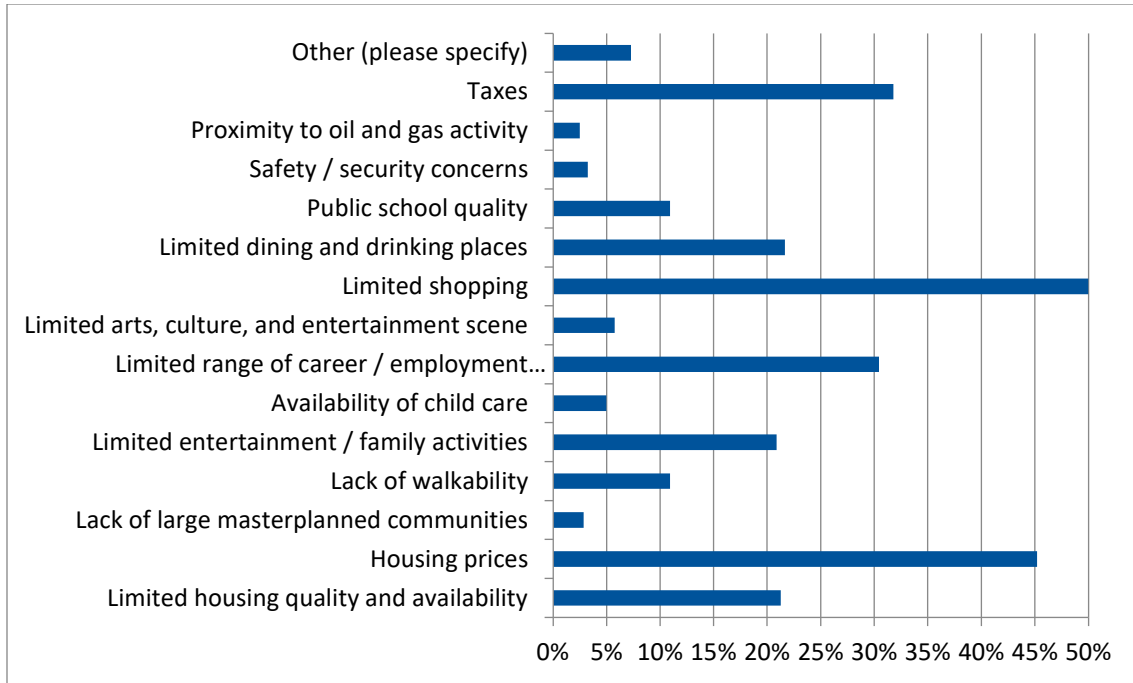
*Open Ended Responses*

churches  
 Close to family  
 It's home - grew up here; small town charm/unique;  
 rural  
 Small town atmosphere  
 Historic aspect of the town and county.  
 The beauty and peace of the land  
 City focuses too much on appearance then the  
 longevity of its employees  
 Downtown revitalization  
 Traffic is congested with too many people traveling  
 through from Austin to Houston, etc.  
 Opportunity for work  
 Friendliness of most residents

love all the outdoor events that the town puts on  
 It's my hometown  
 local events  
 Living on land on the country and away from  
 Houston  
 Conservative values  
 Job is here.  
 My family bought our own land to manage.  
 Too much public housing  
 Proximity to Houston, Austin  
 Own house  
 Family is multi generational within the county.  
 proximity to Houston



**11. What do you like least about living in Washington County, compared to other places? (Choose UP TO THREE things)**



The respondents cited limited shopping, housing prices and taxes as least liked compared to other places. It should be noted that most respondents owned a home and have been living and working in Brenham for 15 or more years yet still chose housing prices as the second most choice for what they liked least about living in Brenham.

N=522

80% of renter respondents said housing prices and 60% of renter respondents chose limited housing quality and availability.

About 60% of the respondents making less than \$50,000 said housing prices, followed by limited shopping, and limited range of career / employment options nearby.

*Open Ended Responses*

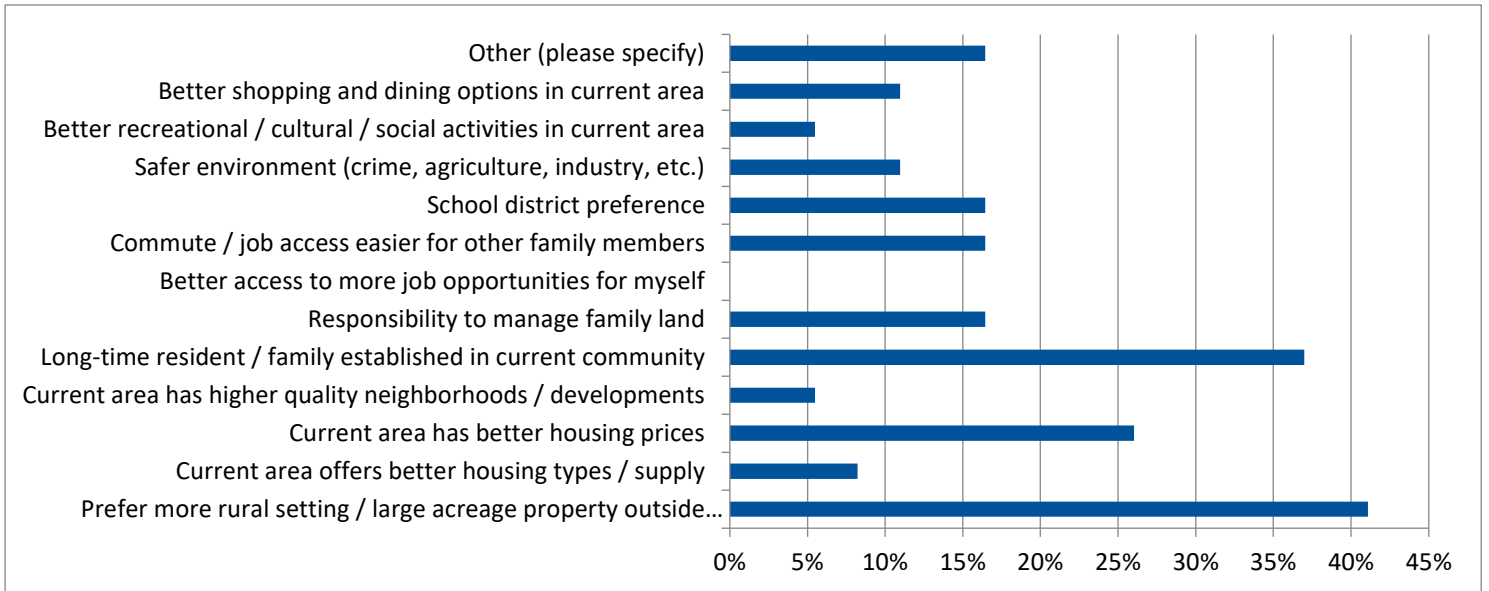
Limited housing for lower income with pets  
 Not from here BS...we're 6th generation Texans. Our little hometown would love to have folks moving in!  
 Nothing for the younger adults to do.  
 Nothing really - living in a small town has it's limitations  
 City/ County Officials  
 Poor quality of roads and maintenance thereof in City of Brenham and in Washington County in general. Ad to that the fact that no politician one talks to about this seems to have any knowledge,

nor do they seem to care about this street and road issue!!!  
 proximity to mountains  
 People moving in who want Brenham to be a big city because they miss what they deem a convenience.  
 pay wages  
 children and family have moved away  
 Majority of everything shuts down after 5 (downtown) No Variety majority of businesses aimed at the ladies.  
 heat and humidity of Southeast Texas  
 Not bicycle friendly roads

Public schools, while still good, seemed to have negatively slid over the last several years  
limited parking in downtown area  
Lack of public transportation, uber, lyft or taxi service  
The influx of Houston people and their liberal culture  
High prices and limited availability of land/real estate.  
It is such a close minded conservative political climate. When Beto O’Roark came to visit, it was embarrassing the way people shouted and interrupted him quietly. It is scary to think what their response would be if the table was turned.  
Low quality medical care nearby  
Low salaries  
lack of running/biking trails - there is jonly the path from the tennis courts to Henderson park.  
To much public housing  
Limited Housing availability, new homes are prices too high for wages  
Resentment between BIBs and BOBs creates a xenophobic narrative and an invisible social underclass.  
Poor high speed internet options outside of Brenham City Limits.

Limited family activities no entertainment , limited career options, lack of shopping options, poor schools, not so friendly people, horrible multicultural representation basically Brenham sucks  
Over populated  
All parks and neighborhoods need sidewalks/walking trails to avoid stickers and mud and to encourage activity  
How the county is turning into an area for Houstonians to run so the can get out of the “Big city”. We are just a live in/ retirement community and in my opinion slowly losing our identity/ heritage as a small community.  
Small mindedness of other community members  
Lack of public transportation  
Not a big fan of tourism. Tourism can be ugly.  
All new houses/subdivisions are LOW QUALITY.  
Need better quality, more options.  
Wish there were more walking trails and outdoor spaces.  
There's nothing I can honestly say I dislike  
High Taxes  
Lack of bike safe routes to amenities

**12. Why do you prefer living where you do now rather than Washington County?  
(Choose UP TO THREE things – you may offer your own opinion by selecting  
“Other” as one of your choices and writing a description)**



Of respondents who do not live in Brenham, just greater than 40% selected prefer more rural setting / large acreage property outside incorporated city and long time residents.

Renters said that commute / job access easier for other family members followed by better shopping and dining options.

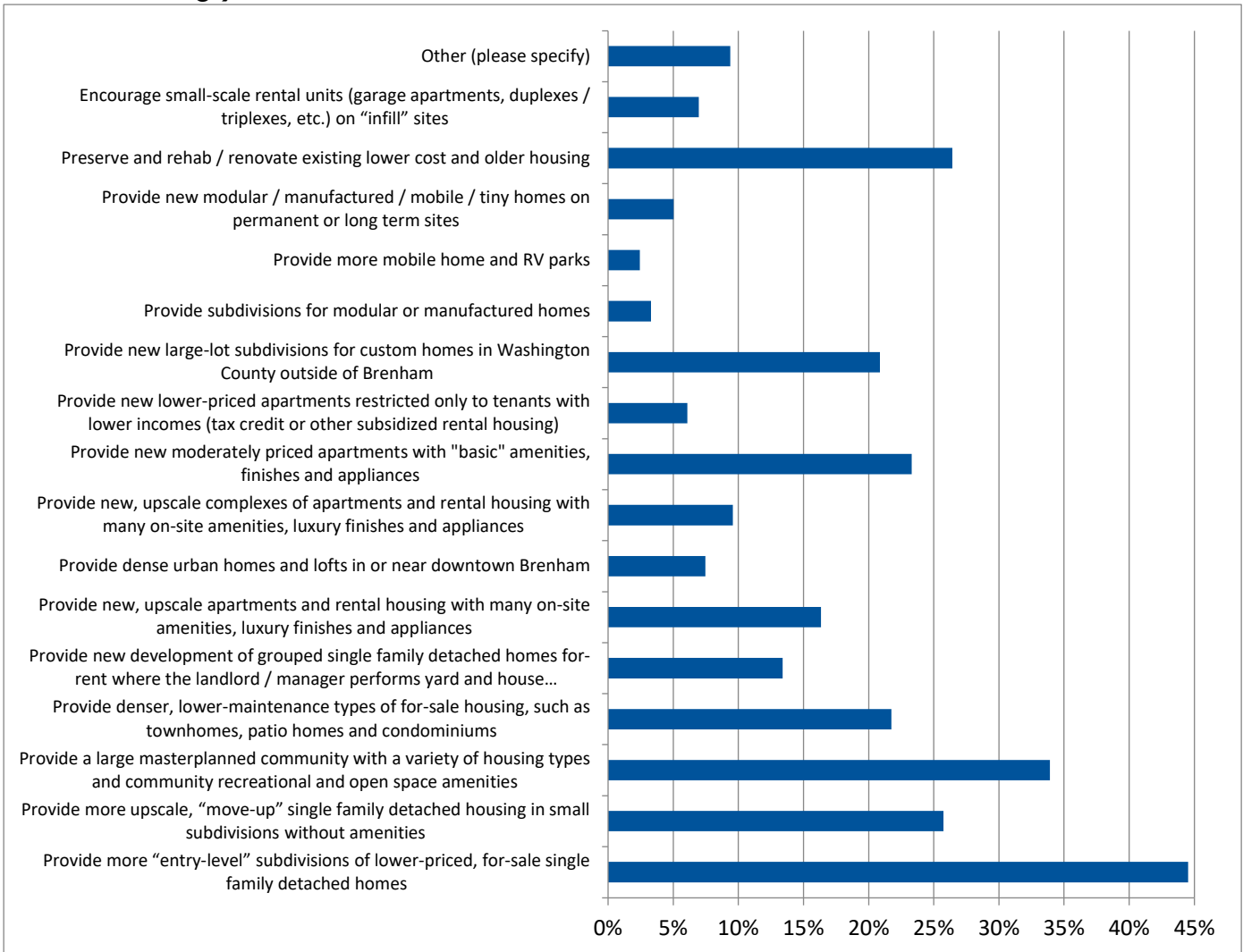
N=73

*Open Ended Responses*

Elderly mother needed care, moved from Independence area 6 years ago.  
 Elderly mother needed care, moved from Independence area 6 years ago.  
 Wayyyyy cheaper housing!!!!!! Property taxes way less.  
 Health concerns necessitated moving to a different city  
 ON FAMILY LAND  
 I have lived their prior to my employment and have not moved to Brenham / Washington County yet.

I can not afford a home in Washington County simply had better job opportunity at the time i started working here  
 Childhood home  
 Lack of good quality rental options in Brenham  
 Could not find a home with the Sf we needed  
 I have found the community of Brenham and Washington County to be extremely uninviting to outsiders and mean spirited

**13. What do you think are the most important changes needed to provide more supply and choices for housing for Brenham workers? (Choose UP TO FOUR things)**



Almost half of respondents indicated that more entry level subdivisions of lower priced for-sale homes as the most important change needed in the Brenham housing market.

Other relatively popular choices were master planned communities, preserving and rehabbing existing older housing, and new small subdivisions of more upscale "move up" housing.

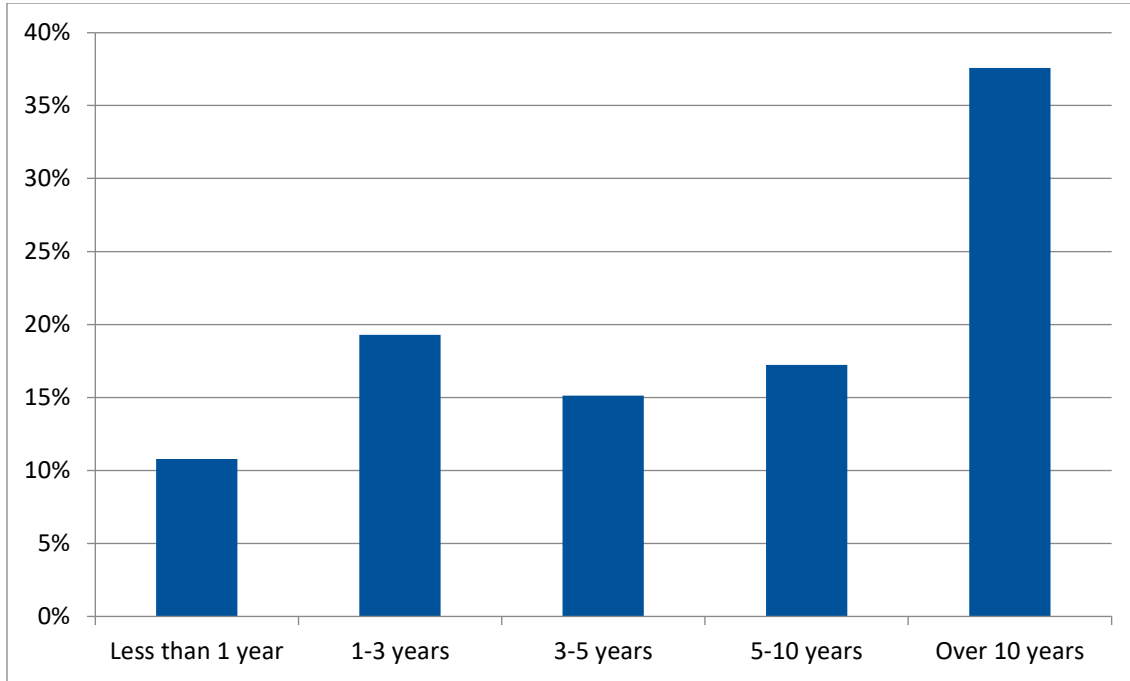
N=575

Renters said provide more "entry-level" subdivisions of lower-priced, for-sale single family detached homes, provide a large masterplanned community with a variety of housing types and community recreational and open space amenities and provide new moderately priced apartments with "basic" amenities, finishes and appliances.

Respondents under \$50,000 said provide more "entry-level" subdivisions of lower-priced, for-sale single family detached homes, provide new moderately priced apartments with "basic" amenities, finishes and appliances, and preserve and rehab / renovate existing lower cost and older housing.

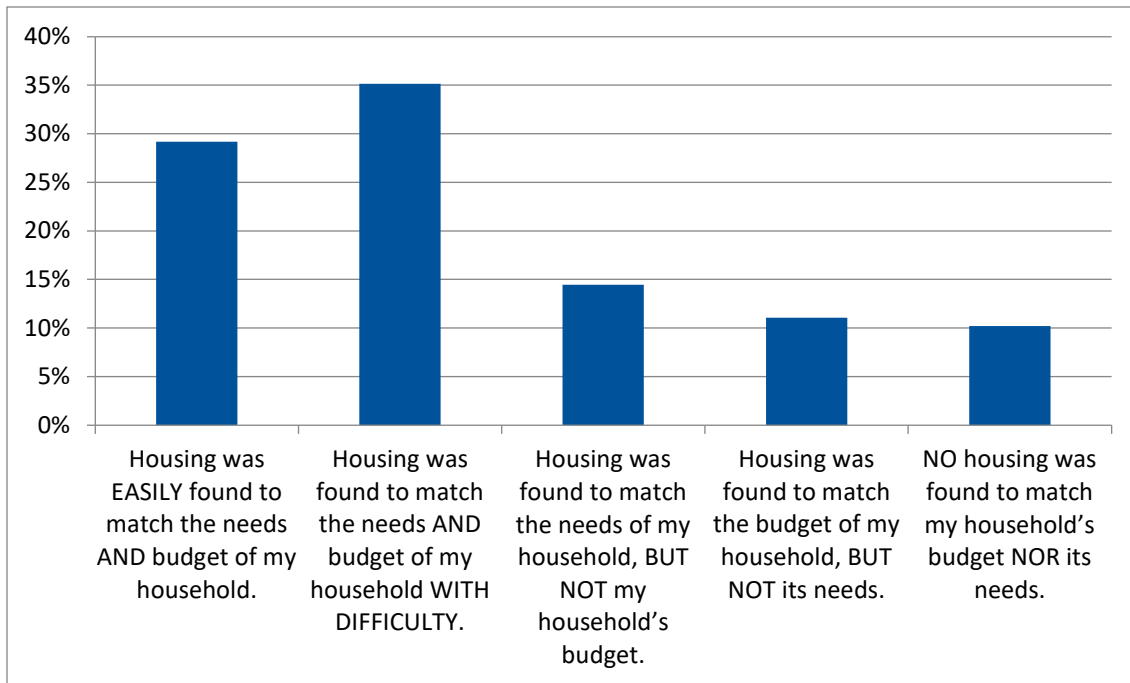
**14. How long have you lived at your current place of residence?**

36% of respondents lived at their current place of residence for more than 10 years.



N=575

**15. When you last moved, which of these statements best describes the experience of your household in finding new housing, with regards to your housing needs and budget?**



For those who had moved within the last 10 years, 35% said housing was found to match the needs AND budget of my household WITH DIFFICULTY.

Approximately 10% indicated that they did not find housing that met their needs or budget.

In total 71% of respondents had some form of difficulty finding housing in Brenham.

N=353

Renters said they had difficulty finding housing in Brenham.

**16. If you wish, please add comments about your experience finding a home that met your needs and budget**

N=115

*Open Ended Responses*

We bought a house higher than our intended budget due to lack of options. Homes were older, Non-renovated homes at a higher cost than would be elsewhere.

Purchased family land and built a home to our specifications

Everything is WAY over priced for rentals and buying.

Finding it extremely difficult to live on my own affordably

Many real estate ventures do not have easy web serach-ability or websites

Finding this home took forever! (over a year) and I basically got lucky, that I just happened to see it just as it was posted, or I would probably still be looking. I am a single mom of 3 teenagers, that brings home maybe 1,600 -1,700 a month (and I have a good job) and my rent is 1,350.

Not a lot of houseing options right now. Seller's market and homes are going like hotcakes.

I'm a realtor so it made the process easier.

I would like to buy but the market was too high - we need a larger home but would like some acreage.

The house in town were too small, too old and too expensive  
Had to buy my trailer house from out of town and had it delivered into Brenham.  
Taxes are very high  
We built our own home on our own land. Much cheaper to built to build than buy & remodel to suit  
it was hard, expensive for bad quality  
Location, price, school district and county/school taxes  
Housing for middle class families is hard to come by.  
Home prices are astronomical  
My architect wife custom designed our home.  
I got lucky.  
It took us 4 years to find a place. Had to live with family until then. Coming from a very lg home to the move to brenham was difficult. The price of our home compared to prices here forced us to have to wait the 4 years.  
Did not know my house was in an HOA before purchasing. Very displeased and unhappy with how small the house is.  
I found my rent home through my old apartment landlady. Otherwise I would have had to move home. Housing is AWFUL and way too EXPENSIVE in Brenham. Especially when most people only make a maximum of \$11/hour. It's not economically viable for a lot if people to live here and yet they can't move out because they can't save enough \$ to move.  
We got lucky. I person was moving out of Ralston Creek and was putting her house on the market the day after we already starting looking. our realtor knew it was going on the market so we got an early look and snatched it up. it was in our price range thankfully. we would have liked to have had a older home on the traditional streets but with upgrades it would have busted our budget.  
Bought a new home that was overpriced and very low quality as there were no other options our budget was \$100K max and there was very little for a family of 4 in that range  
Was told about the house before it went on the market.  
Affordable housing within Brenham city limits is hard to find. We had to go outside the city limits to find something affordable.

If we were unable to do our own renovations it would have been impossible to find a home  
We were able to pay cash for a home and purchase two rental houses when we moved to Brenham almost ten years ago. That would not be possible now.  
Cost of homes is too high, and not enough availability.  
Very difficult, many older homes needed extensive updates that would cost a lot and current owner would not consider that in the negotiation of the price of the home, other homes were simply overpriced  
First time buyer, did not know what we wanted until after we moved in and lived in house for a bit.  
HOA does nothing for me but restrict me so yeah.  
Many Apartment complexes were at or near capacity  
Regarding Question 14 - I was very lucky to be asked to live and manage the Giddings Stone Mansion - but die to the prices of housing I can't afford to buy.  
Housing Market doesn't match the Average pay scale for Washington County.  
Prices and availability are ridiculous. It was very difficult to find stuff because it was purchased quickly. Everything is way above our reasonable budget too  
Market was outrageous getting out bid by people coming in from larger cities with cash in hand  
It ended up being cheaper to build what we needed. This doesn't truly apply because we live in a parsonage.  
Currently trading services to family in exchange for affordable rent  
There wasn't a lot of inventory when we were looking. Most homes were either too expensive or needed a lot of renovation work.  
Bought a home on acreage but had to sacrifice housing size to get the amount of land needed. Need a larger home, but doesn't fit the budget right now with the prices of materials.  
As an observer, it is difficult for others to find affordable housing based on typical wages  
Rent has skyrocketed, and for a family with pets it's almost impossible to find a rental at a reasonable cost  
chased a 1917 fixer upper

When you are a single parent of 2 kids and for a rent house or duplex so that your kids have a yard is 1300 and up for a 3 bedroom

We had to build due to the lack of existing housing in our price range.

We are in the business of real estate and buying/flipping houses, so our situation is different in that way.

My family and I recently relocated to Brenham, TX prior to the school year; we had difficulty finding a decent home for rent within our price range.

Note: we are looking into purchasing a home within the next couple of years and will be looking for a home that is moderately priced (below \$210,000).

Family home that was sold to us.

volume of houses in 200-250 range were very low in 2018.

There was very little available for rent.

We were living Hempstead and commuting to Jersey Village for work. I pursued a job based in Brenham that allowed a complete remote work option.

When we sold our house in December, we were an able to find any house we loved with such a low housing inventory. We chose to rent instead so we could wait to find the right house within our budget. We're budgeting \$300-350k.

Housing choices to buy were very limited and the cost of homes was inflated.

small 4 BR but it works

It was much easier finding the right property in 2015 than today.

I was lucky to have a friend that know someone that was renting their home.

I have rented apts in 3 other states, and it was most difficult to find something for a single person in Brenham.

At the time of my move there were no rentals available. I did not have time to purchase due to the immediate relocation.

Only able to find a home that met needs and budget because parents gifted a large down payment on home

it was a family home.

Hard to find housing with low income for family of 4

New homes in the 200,000 price range are hard to find. Not interested in Stylecraft type n'hoods.

Land and housing is outrageously expensive. The only people who seem to be able to buy/build are

Houston-area/other area transplants or those from moneyed families.

More 3 bedroom 2 bath apartments would have been very helpful .

Finding a reasonably priced home and land in this town/county is difficult. We went over budget to build what we wanted and we actually had to downsize our original plans to stay close to budget.

Rental properties are so expensive in Washington County--as was the land that we purchased, so we could not afford to rent while we built our home. Instead we moved in with family, which was a very difficult decision for us.

Homes were overpriced for the work needed to bring them up to code, much less make them aesthetically pleasing, but I would rather purchase those homes and do the work (that is what we did) rather than see the terrible neighborhoods with tiny houses and lots and poor quality that are going up out on 36 and near the high school. Please don't add anymore of those subdivisions - at least don't allow any variances for smaller lots or tax credits etc.

Brenham offers very limited amounts of rental properties at the cost of surrounding areas with nicer establishments.

We built on family owned land, so choosing a house that was right for our budget was completely in our control.

I found several rental options in Brenham well below budget, but needs of house size and in a safe neighborhood were not found. I recently sold my home and due to the current market for houses I decided to rent for now.

I had to compromise on certain aspects of what I wanted in order to settle on a home.

Home prices are very expensive. We could not find a home to buy that was affordable and fit our needs so we had to rent a home.

We had to go outside the Brenham area and found multiple home that met out budget and needs

Hard to find housing in my budget that has my needs

Real estate agents and rentals are a joke here.

Fortunate enough to be offered a house off market by a local Church member.

Housing and property was found however the house was in need of major renovations in order to accommodate our needs and lifestyle.



We purchased our home from my wife's parents.

Therefore, we did not have an issue because we didn't have to search for one.

I struggle to keep up with my rent, and I need more room for me and my kids. This is what I can afford. We have a large family. We needed a home with at least 4 bedrooms. We found very little 4 bedroom homes for rent and those we found were extremely expensive.

I was on several waiting lists for MONTHS before anything opened up in Brenham. None of the apartments are new and the one new complex is income restricted.

I looked at buying a house several years ago. Prices were high, but interest, property taxes, insurance, and an increase in utilities were much higher than rental costs. But had I bought then, I would have made a >\$100k return by now. Nothing within reason appears to be attainable anymore at my level of income.

it is hard to find a low cost housing, that has safty in mind. currently in a home that is sinking, cant open my front door, the parts of the ceiling is afalling down.. yet its 750 a month to stay.. so we need more affordable low income housing, that we can feel safe in

We built on our previously owned acreage property. There no reasonable house 3 bed 2 bath homes for under \$225,000

What experience it's been a headache finding a rental home that is actually affordable and doesn't look like a hell hole! Home prices here are absurd not everyone here is a Brenhamite some of us come from the real world where actual cities not towns exist and their are homes and apartments to actually choose from not some dinky garage apartment

Was hard

No way could I afford a house now in Brenham.

Found the perfect fixer upper, gutted and completely restored the interior and made it my own.

We were looking to move from the city to a small acreage home for my family of five. We had two options at the time. The cost of living on land here is too expensive, and there are not viable options available.

I was really surprised to find a lack of moderately well appointed apartment complexes in the area.

They seem to be either inexpensive but not ideal for safety, proximity to college and size OR far too overpriced with not the amenities to justify the cost.

I was lucky to have a friend who knew his neighbors were selling in the future, and having an interested buyer helped them make that decision sooner than they planned

There is a huge problem if you plan to live and work in the county. The cost of housing in Washington county is to expensive for a average salary person that works in Brenham. I feel for the locals that want to be a first time buyer because the housing is so high, but the market drives the prices and no developer is going to leave money on the table if they know they can get more from someone else.

It is very difficult to find a good house that is not a fixer upper that fits in a good budget. There is not enough good paying jobs in brenham to help people afford the house prices in brenham area.

It was extremely difficult to find housing for our budget (entry level) that wasn't run down or in a shady part of town. When we did find one, it was because we saw it before it went on the market, and we were told had it been listed it would have sold in less than a day.

There is no affordable housing.

Wanted some small acreage but nothing under \$250k

We had to put in an offer for our house the first 15 minutes it was listed in order to get a house out here. It's only a 3 bedroom for 5 of us and 2 of the rooms are small so it's hard to put 2 kids into 1 room but we make due with what we have until we can afford something larger.

It took me almost a year of searching and living with my children before I found what I did and I jumped on it because it was the cheapest I could find even though it's a lot larger than I need but for the price I took it

Currently having trouble finding a decent affordable house

Built new home as we could only find older homes needing work on .5 and acre or more.

A lot of rentals in Brenham are more for the college students. The rent prices are ridiculous and people keep purchasing properties for investments and that leaves us families trying to purchase a home in a smaller budget more difficult.

I couldn't locate housing that met my families needs within our budget. I am a single mom with a teaching position at BISD.

6 years ago, we were able to find a home under \$200K with 3 bed/2baths. That is no longer attainable. Brenham is such an in-demand area, but it's become more difficult for middle class families to afford to live here. Jobs in Brenham don't pay enough for the cost of living.

In 2014 there was a large market but they were bought up faster than we could put in an application. We didn't want to be house poor, so the budget was pretty tight.

I formerly lived in a one-bedroom apartment in Brenham for 1.5 years. Cost of rent was high for the smallest unit with little extra space for me to grow. I found a 2 bedroom apartment also in town but has no washer/dryer in unit, outdated appliances and bad parking. However, rent for my 2 bedroom is only \$10 more a month and I comprised space for amenities. In my opinion, apartments are too expensive in Brenham, especially for their age and space they offer.

We moved here in 2014 and finding a house that suited us and our budget was very easy.

There is almost no Decent, AFFORDABLE housing available for sale in Brenham

When we were looking for our ne t family home there was nothing available to meet our needs. We were looking in the \$350k and up with 5+ acres. We ended up having to buy family land and build.

#### Brenham Housing Authority

When my family moved to Brenham we had to buy before we felt ready due to zero availability of any rental housing. Zero available homes or Apts for rent at any price.

The cost of the home was over \$400k and the location is not ideal. There are rental and lower income properties nearby that may negatively impact any improvements or further investments into our property.

Taxes are extremely high for a new subdivision with zero amenities. Subdivisions lack parks/pools and are cheaply built.

Being a young newly married couple with no kids it was hard finding a 2/1 or 2/2 house within reasonable price. We were better off getting a bigger house for almost the same price within a good neighborhood.

We need more moderate new houses for younger professionals.

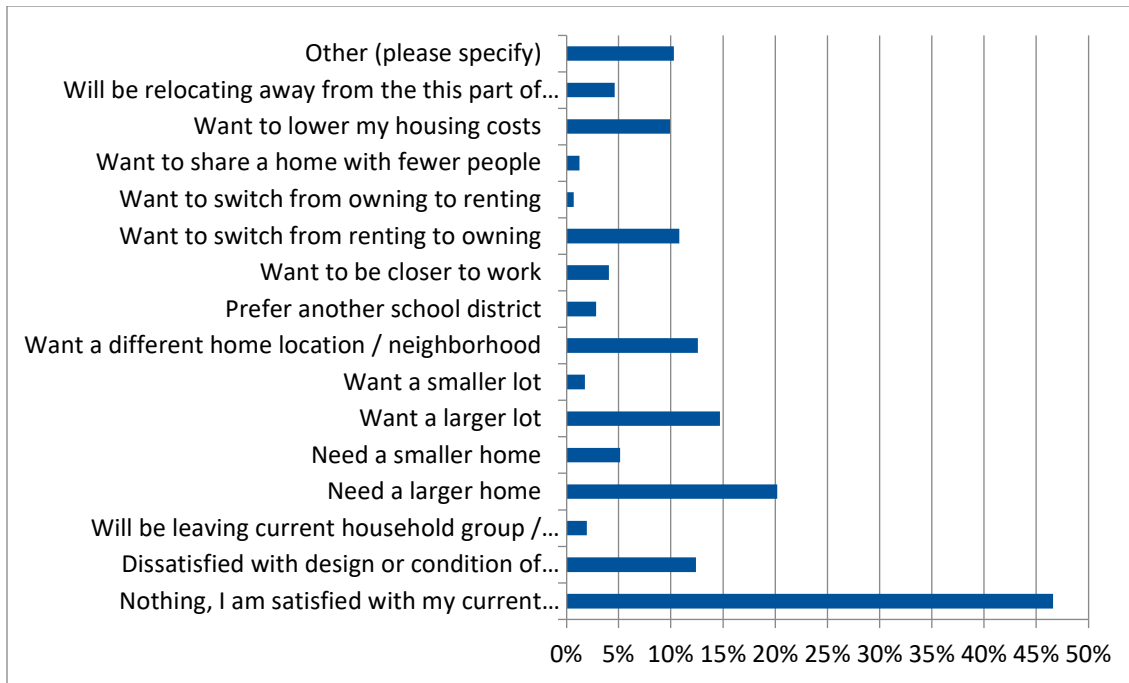
Limited options in our budget range at the time we purchased. Continues to be an issue today.

nearly 10 years ago it was easier to find something within my budget, recent searches have proven more difficult to find something I could afford.

Not a lot of housing options, unless you want to buy a lot and build

Had to buy a home, over 100-years old that needed MAJOR repairs. Did a lot of repairs, now it needs more & can't find an affordable repair company.

**17. Are there any reasons that make you desire or need to move to a different home at the present time? Pick all that apply.**



Almost half of respondents stated that they would not consider moving to a different home. Of the rest, by far the most common reason given for considering a move was needing a larger home (20%). Wanting larger lot was the next most cited reason.

N=564

Renter respondents said, want to switch from renting to owning, need a larger home, and want to lower my housing costs.

*Open Ended Responses*

Need a larger home in my current location of Burton.  
 Want to own my own home but cant afford the cost of living here  
 Townhouses or garden homes with ammenities  
 Lower taxes.  
 Would love a house on a golf course.  
 Lower taxes and better schools  
 Do not like PGMS water  
 Would love land and to be out of a subdivision  
 Want to live in a newer home!  
 If health concerns developed that required specialized medical care  
 We love our current home, except that it is on a gravel road. So far no politician has decided to pave the road despite requests of several other residents. The political climate in Washington County is simply problematic to say the least!!!

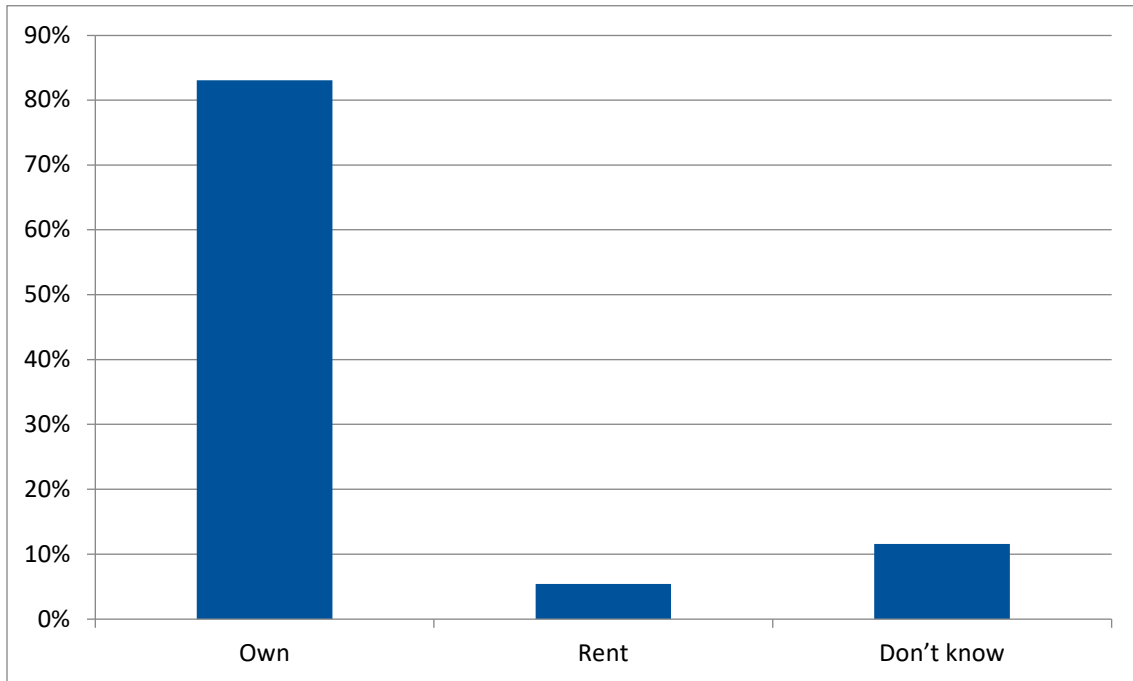
one day hope to move back to the country but in town now due to kids activities in school  
 Once last child is out of school will probably look to moving to the coast down south  
 Health concerns  
 For health concerns, I will move where better health care is available.  
 retirement  
 Valuations and taxes too high. Locals should not pay more taxes because of others that spend so much for their properties.  
 Only working here temporarily...  
 Want to rent my home to pay off debt from divorce. wife wants larger home she feels confined. I would like to not live in a two story house would like to find a house with one floor about .5 acres with no HOA. I have more wants but that is for me to know :D

more acreage  
Traffic congestion  
Would sell if the price is right  
If we buy land to build a small retirement home.  
Selling for the equity in my home due to COVID impact on my business.  
I may have to move out of the region due to increased property values  
Too much subsidized housing in Washington Co want to move out of the city  
I love where i live in Cypress , Tx .  
Retirement  
None, I just moved and have a 1 year lease, it was to live with fewer people  
Home needs work and cannot afford to repair  
1. Quality of Brenham ISD decreases due to injecting racial teaching into curriculum, or lack of discipline becomes a bigger problem. 2. Our neighbor who promised not to sell or build on his property develops it into a subdivision for family members. Once our own home is complete we will move there.  
Building out of the city limits would be the only option I would consider.  
My neighbors  
Ready to be in my own place with my kids.  
Work all adult life to build up a place and then property tax makes it unaffordable--over \$800 a month soon  
Would like a place to live that I can afford for me and my son.  
Need a larger home with a larger lot  
I want more amenities. My current apartment has NOTHING to offer but it was all I could find. There is no gym, dog park, walking trail, nothing.  
Do not want the stigma of being a single middle-aged adult male with a full-time professional job that's still living with his mother because moving out is a financial dead-end.  
I find medical facilities and choices lacking in the area. If our healthcare needed, increase, we may

consider moving to a community with more choices for medical care. Our insurance does not cover Baylor Scott & White so this is a problem.  
Will relocate & build on a property I own at some point because the housing prices are too good not to sell  
Empty/sad (rental) properties that are in need of attention from owner who lives out of state. City should keep track of such properties and do something to maintain neighborhoods integrity.  
I currently live within the city of Brenham but am trying to get out into the county where I was raised. The city is just getting more and more hectic and I like the freedom of being able to do what I want and not have neighbors right next door, I like my space. Brenham is not the small town it once was. I do not want to live in town, but I cannot afford land outside of town so it seems like I am stuck where I am.  
If we can find 3-7 acres under \$250k  
Property taxes and land are too expensive  
Lack of affordable internet connection is possible reason for leaving.  
I plan on getting work experience in Brenham and transitioning to a larger town in the future. I recently moved and am mostly satisfied with my new apartment, but don't plan on staying in Brenham for many more years.  
We looked for 3 years before we were able to buy a home here.  
Downsize land  
May need more accessible housing  
Not planning on moving any time soon  
The traffic had increased near our home. No longer suitable for children.  
Move where there are better jobs  
High taxes

**18. Would you plan to own or rent if you were to move now?**

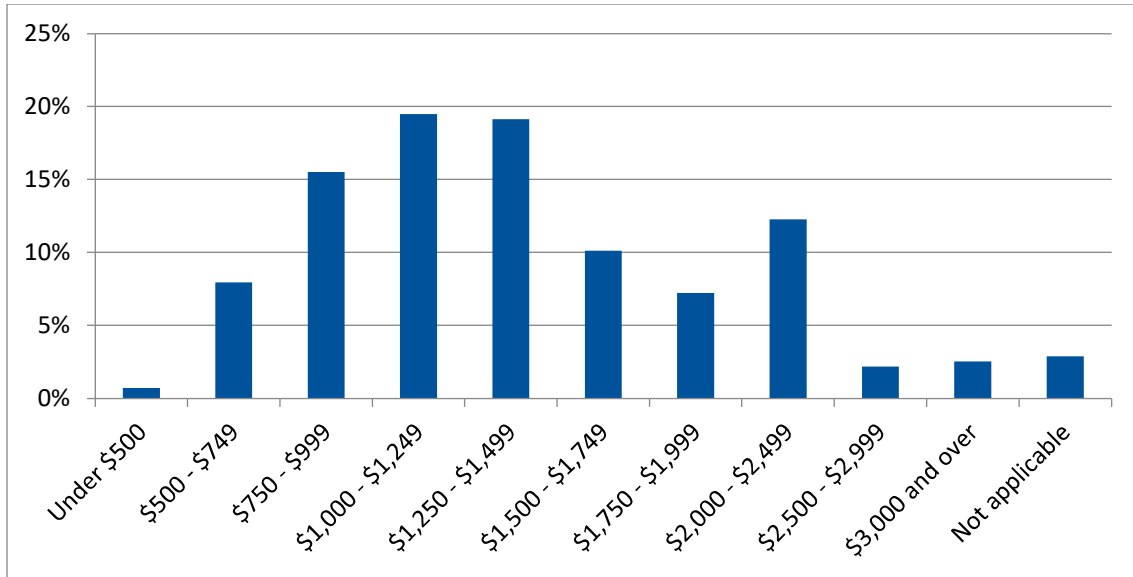
More than 80% willing to consider moving would plan to own their next home if they were to move. This indicates high demand for new single-family home development.



N=277

66% of renter respondents said they plan to own. Given the average prices renters said they paid monthly, this appears like a feasible option for most renter respondents.

**19. What is the maximum you would be willing to pay for your next home, per month?**

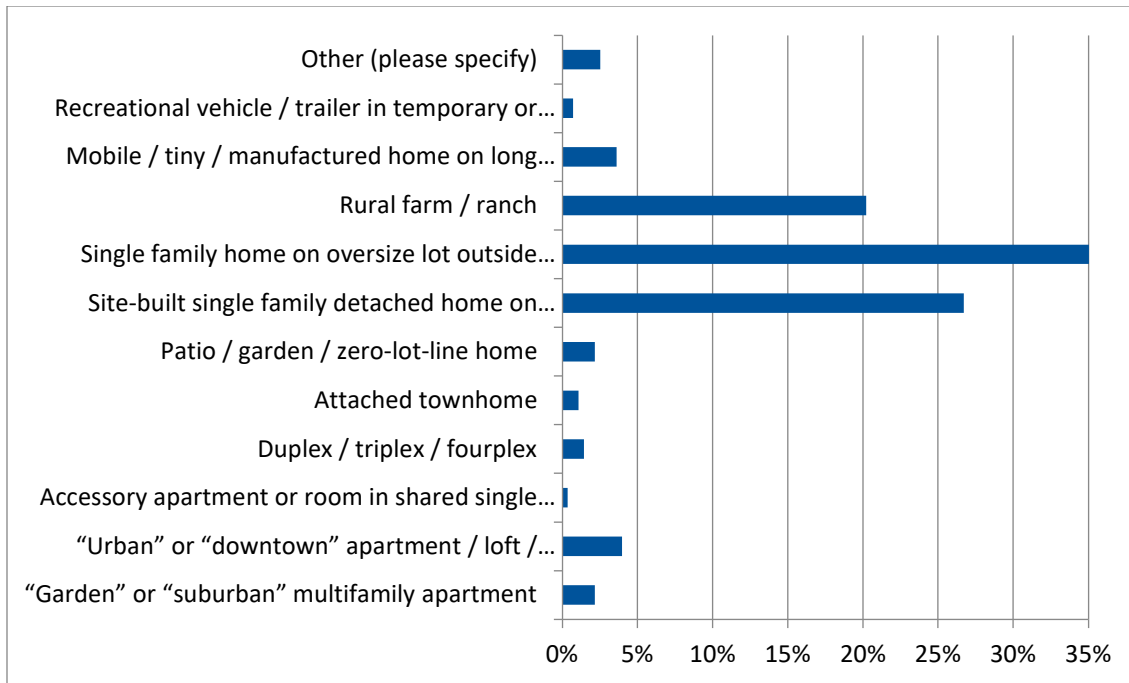


The maximum respondents said they were willing to pay for the next home was weighted toward price ranges \$750 per month to \$1,499 per month. N=277

Almost 70% of renters said they would be willing to pay between \$750-\$1,499 per month. This shows strong demand for new market rate apartment units at these prices.

Respondents making less than \$50,000 would be willing to pay between \$500-\$1,249.

**20. Given your financial, employment, and family situations, plus personal preferences, which housing type would be the best fit for you?**



35% of respondents think that a single family home on oversize lot outside city limits would be the best fit based on personal preference and situation.

Site-built single family detached home on regular lot in town and rural farm / ranch were the next most popular responses.

N=277

Renters overwhelmingly prefer a single family detached home or home on an oversized lot outside the city.

*Open Ended Responses*

House on a minimum of 2-5 acres

Beach house near the salt water

barndominium on a lot next to my mom

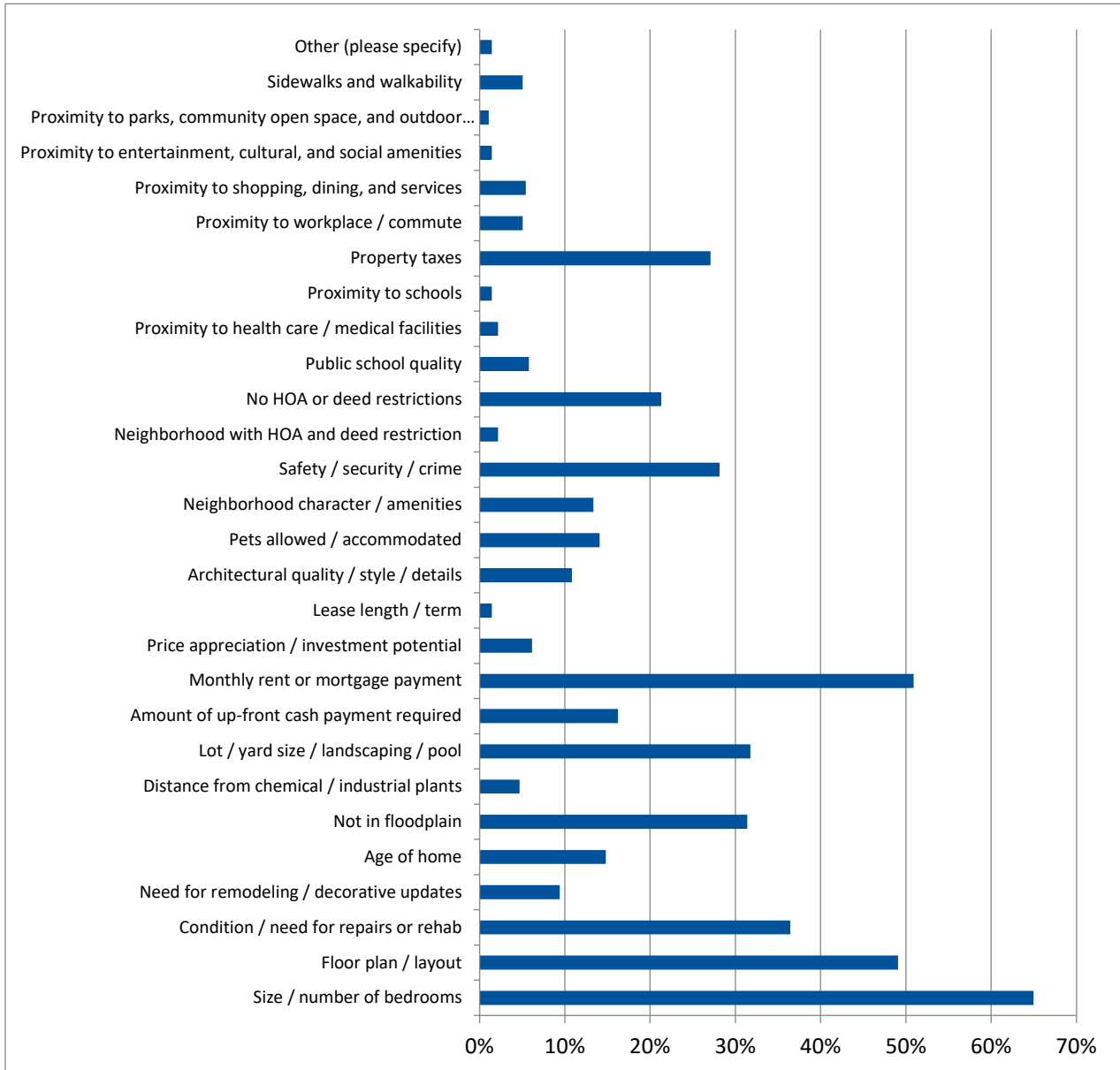
1-2 acres with home, not in the city limits

Single family home on moderate lot outside of city limits

Site-built single family detached... if there was a better, walkable solution I'd consider it.

tiny home on at least 1 acre for the rest of my life

**21. What do you consider to be the most important factors in selecting your housing type and location? Check UP TO FIVE.**



Two factors in selecting a new home were identified by a majority of respondents: home size / number of bedrooms and the monthly payment.

Other factors identified were – floor plan / layout, condition / need for repairs or rehab and age of home / lot / yard size / landscaping / pool

N=277

*Open Ended Responses*

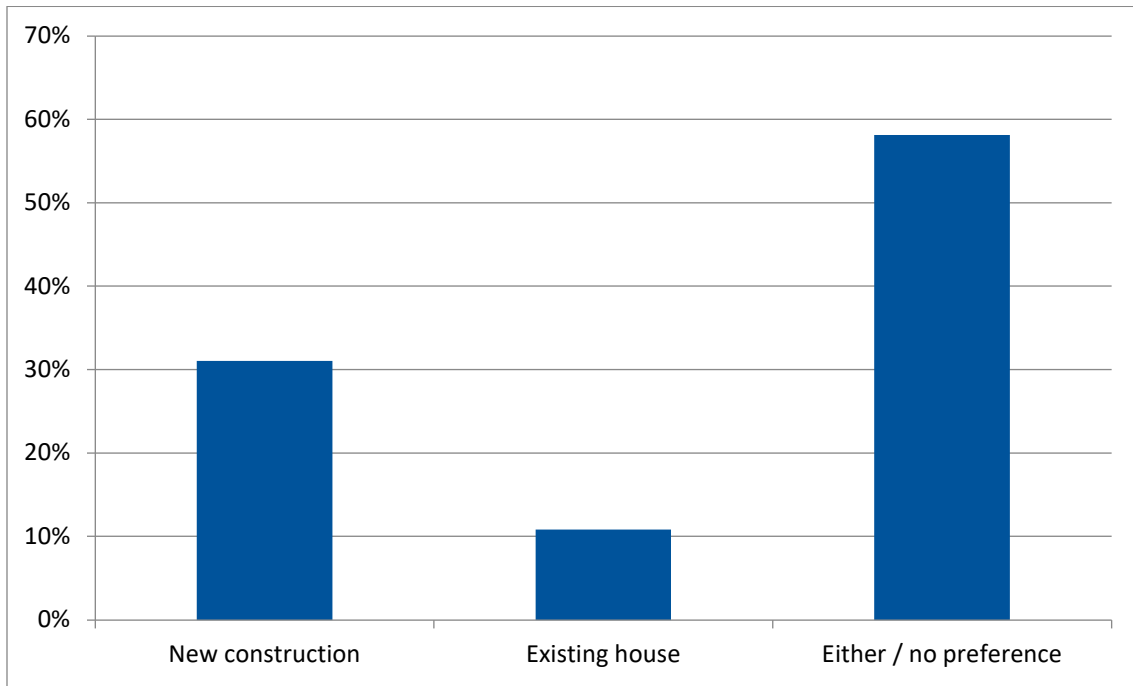
Fiber internet connection.  
Acreage

Would be nice to rate all of these in order of importance.  
The busyness of the road



**22. Would you prefer new construction or an existing home for your next residence?**

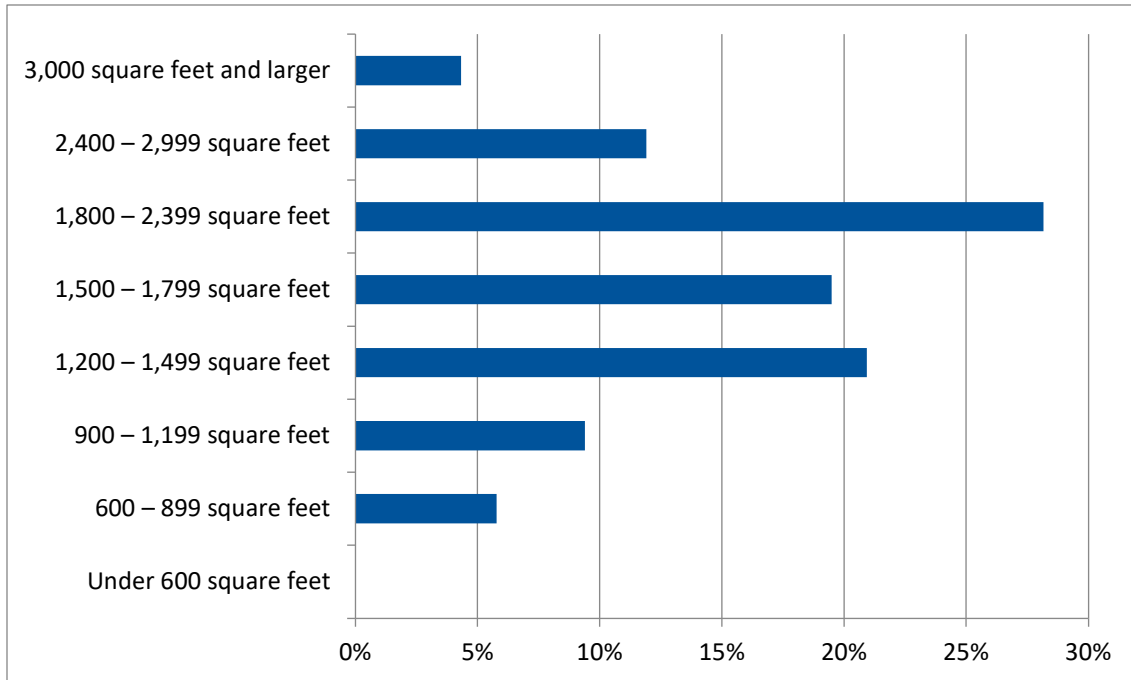
58% of respondents indicated no preference, followed by new construction.



N=277

More than 60% of renters said no preference. This shows that most would be willing to live in an existing home.

**23. What is the minimum size of your next residence that you would consider?**



1,800 to 2,399 square feet was the most common response for the minimum size considered for next residence. Other popular minimums were 1,200 to 1,499 square feet and 1,500 to 1,799 square feet.

This lends well to lot and home sizes that can achieve the most affordable construction and therefore for-sale costs for new construction of entry level single-family homes on lots that could be as small as 25' if the City's zoning and minimum lot size restrictions were to be relaxed to allow a greater variety of more compact market rate single-family housing types.

N=277

30% of renters said 1,200-1,499 followed by 20% 1,800-2,399.

85% of less than \$50,000 respondents would consider 600-1,799.

**24. What is the room plan you would most desire for your next residence?**

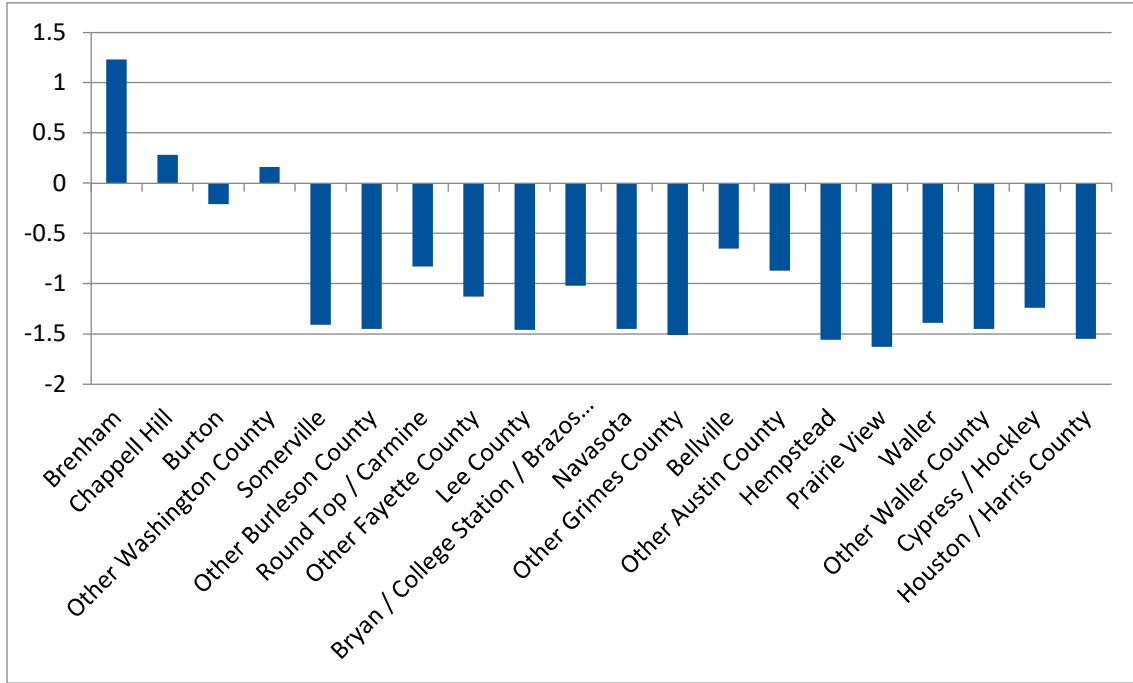


Just over 45% said 3 bedroom and just about 35% said 4 bedroom for a combined 80% of respondents who would most desire either a 3 or 4 bedroom plan for their next residence, indicating demand for single-family homes. N=277

Almost half of renters want a 3 bedroom and almost a third said 4 bedroom.

65% of less than \$50,000 respondents desire a 2 or 3 bedroom

**25. If your preferred housing type was available at or below your maximum price, how likely would you be to consider moving to each of the following locations?**



By weighted average Brenham was viewed the most desirable place to live among all choices if the most preferred housing type was available at or below maximum price in any of the listed areas.

This shows what interviews with employers and other stakeholders in the community revealed regarding housing in Brenham as the top priority for the community’s continued success.

People want to live in Brenham, especially those who work in Brenham. If more market rate housing was available in Brenham many workers who live in surrounding communities would relocate to Brenham.

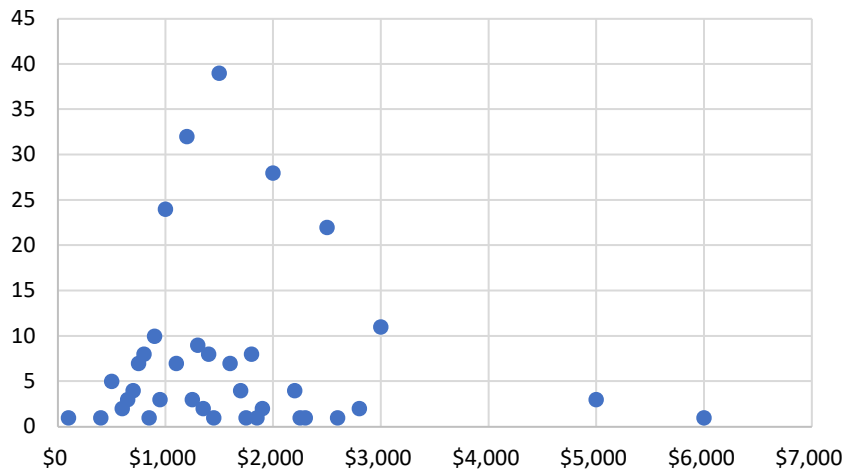
N=277

**26. For the room plan identified in the previous question that offers your most desired features, what amount would you and family members you live with be willing to be responsible for per month in either mortgage, taxes and insurance cost (if buying) or rental payment? (enter a numerical cost between \$0 and \$10,000; do NOT include contribution from additional unrelated roommates) Money cost:**

The most common monthly housing price choices are shown in the table and chart.

Amount	Respondents
\$6,000	1
\$5,000	3
\$3,000	11
\$2,800	2
\$2,600	1
\$2,500	22
\$2,300	1
\$2,250	1
\$2,200	4
\$2,000	28
\$1,900	2
\$1,850	1
\$1,800	8
\$1,750	1
\$1,700	4
\$1,600	7
\$1,500	39
\$1,450	1
\$1,400	8
\$1,350	2
\$1,300	9
\$1,250	3
\$1,200	32
\$1,100	7
\$1,000	24
\$950	3
\$900	10
\$850	1
\$800	8
\$750	7
\$700	4
\$650	3
\$600	2
\$500	5
\$400	1
\$100	1

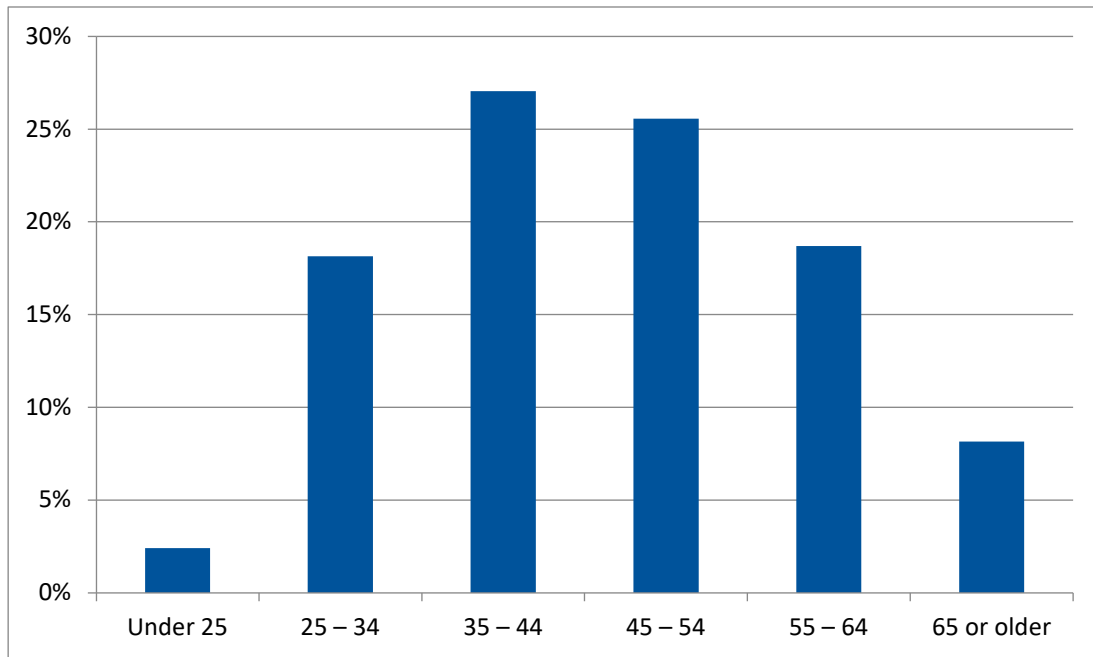
The \$1,500 and \$1,200 range was the most common with almost 30% of responses. Another 19% combined chose \$1,600-\$2,000.



There were 16% who chose \$2,200 or more.

N=277

**27. Which of these categories matches your age in years?**

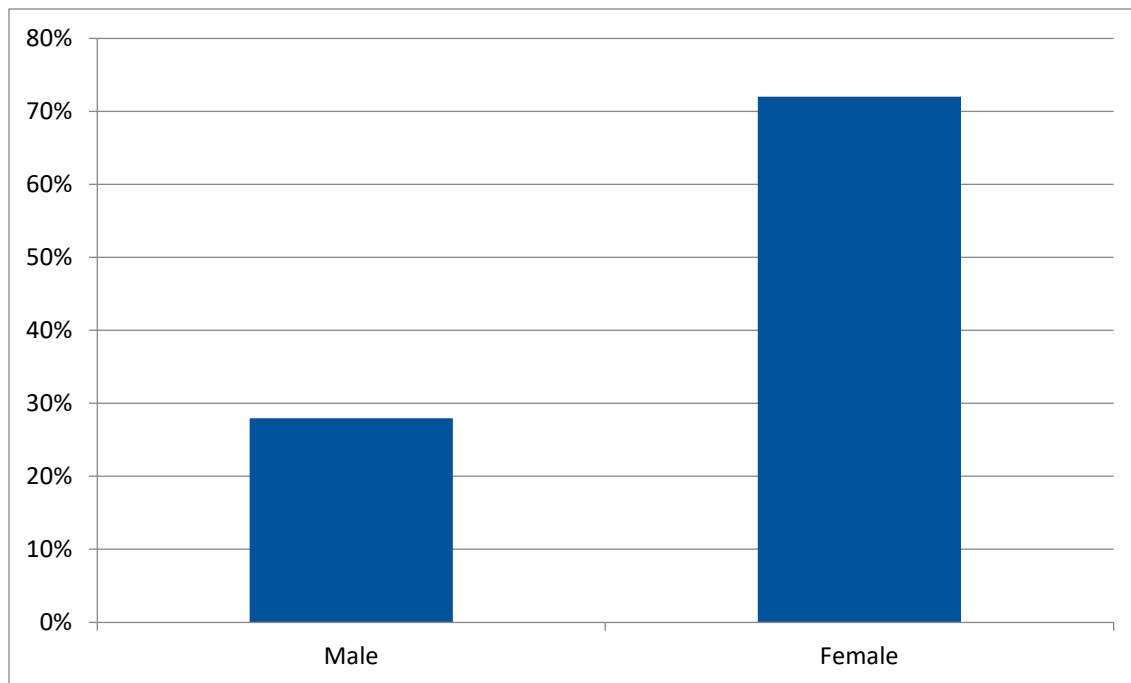


There were 27% of respondents age 35-44 which was the most common followed by 45-54 and 55-64.

N=540

Most renters were aged 35-54.

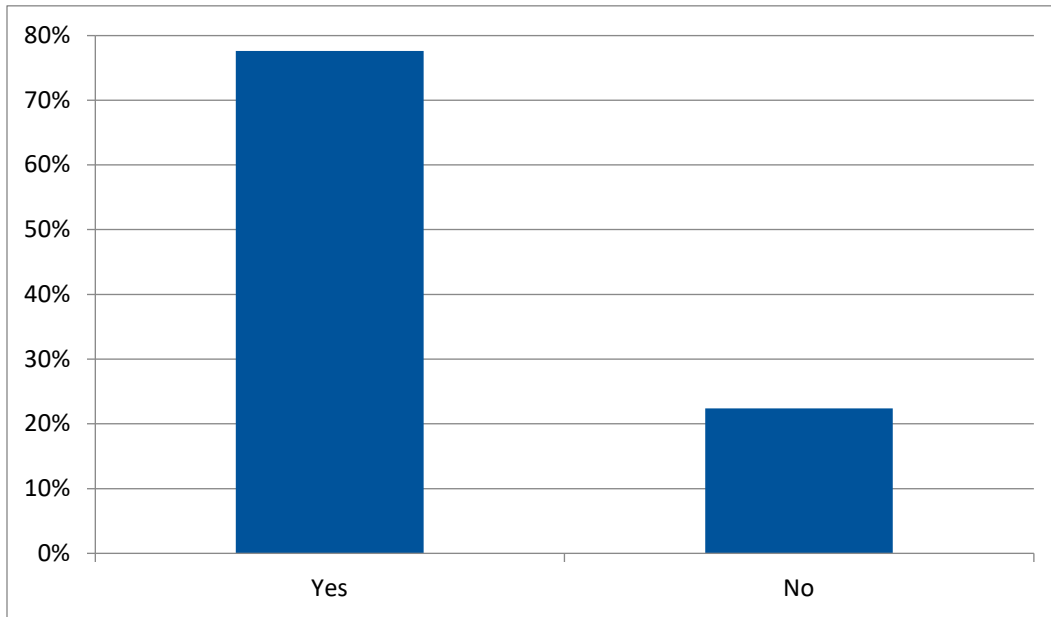
**28. Gender**



There were many more females than males who took the survey. 70% of respondents were female and just under 30% were male. N=540 Almost 80% of less than \$50,000 respondents were female.

**29. Do you live with a spouse or partner?**

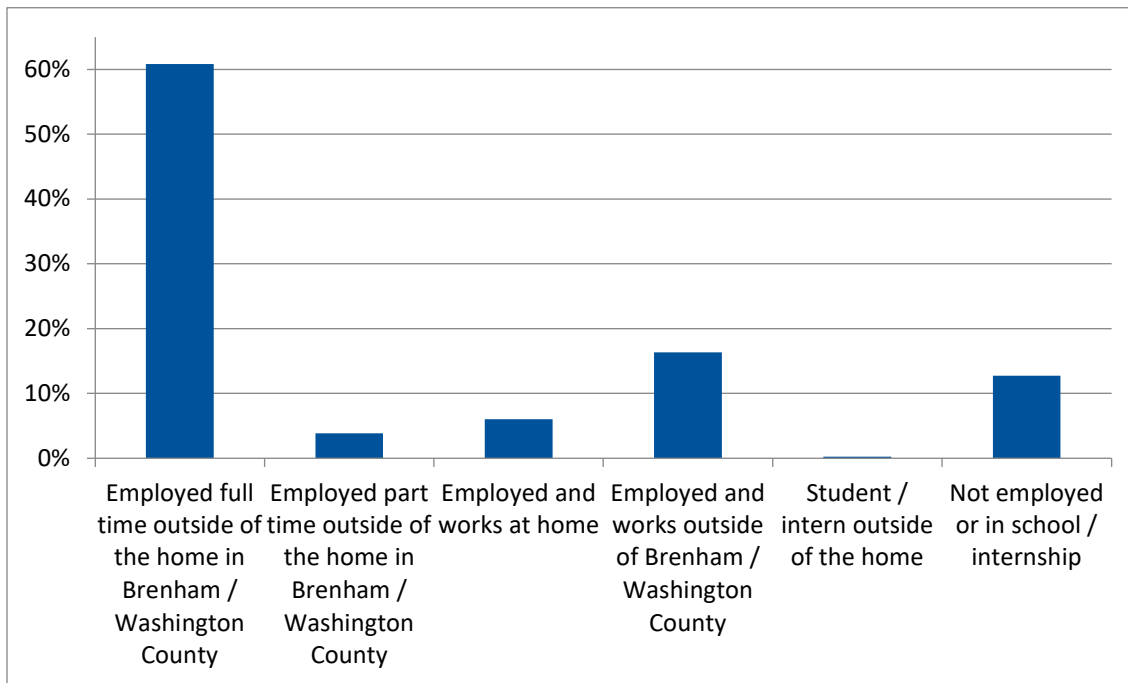
Almost 80% of respondents live with a spouse/partner.



N=540 More than 60% of less than \$50,000 respondents did not live with a spouse or partner.

**30. Please select the best description of your spouse/partner's employment status**

About 60% said their spouse/partner worked in Brenham/Washington County and about 18% said they were employed outside of Brenham/Washington County.



N=416

**31. Where is your spouse's or partner's current geographic location (city or town) of employment or schooling (name closest city or town)?**

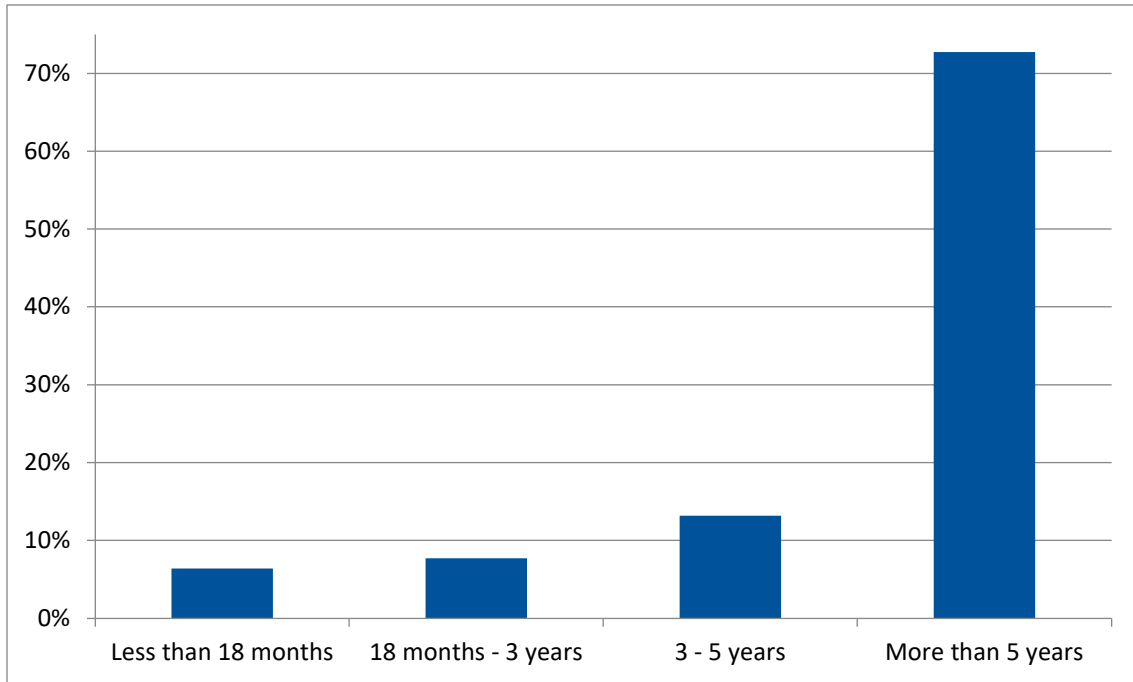
Place	Share	Count
Houston	17%	12
Bryan	13%	9
College Station	12%	8
Bellville	6%	3
Brenham, TX	4%	3
La Grange	4%	3
Austin County	3%	2
Cypress	3%	2
Giddings, TX	3%	2
Hockley	3%	2
Waller	3%	2
West Texas	3%	2
Bay City	1%	1
Brookshire, TX	1%	1
Caldwell	1%	1
Conroe	1%	1
Dallas, TX	1%	1
Franklin ISD	1%	1
Hempstead	1%	1
Industry	1%	1
Katy	1%	1
New Ulm	1%	1
Prairie View, TX	1%	1
Rockdale Texas	1%	1
sealy	1%	1
Snook, Texas	1%	1
Somerville	1%	1
Spring	1%	1
Temple, Texas	1%	1
Tomball, TX	1%	1

18% of respondents said their spouse/partner employment was in Houston, followed by Bryan, and College Station.

N=68



**32. How long do you expect to continue working in Washington County?**

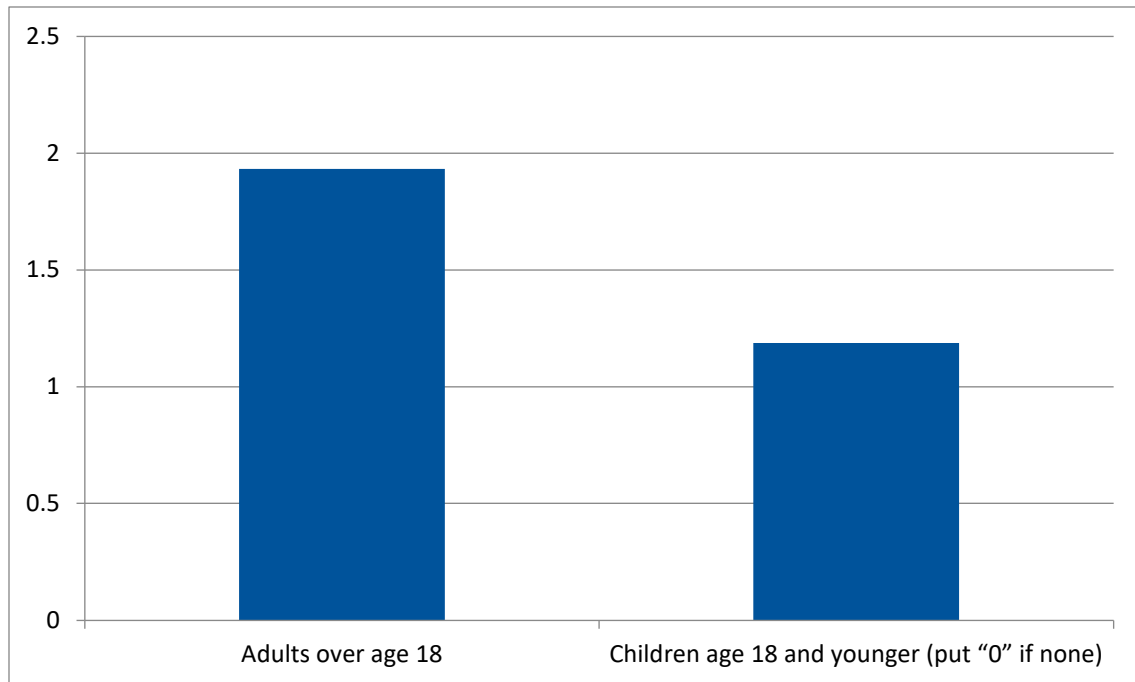


73% of respondents said they expect to continue working in Brenham / Washington County for more than 5 years showing positive signs of local workforce resilience and future potential demand for workforce housing development.

N=532

More than 60% of less than \$50,000 respondents expect to work in Brenham / Washington County more than 5 years.

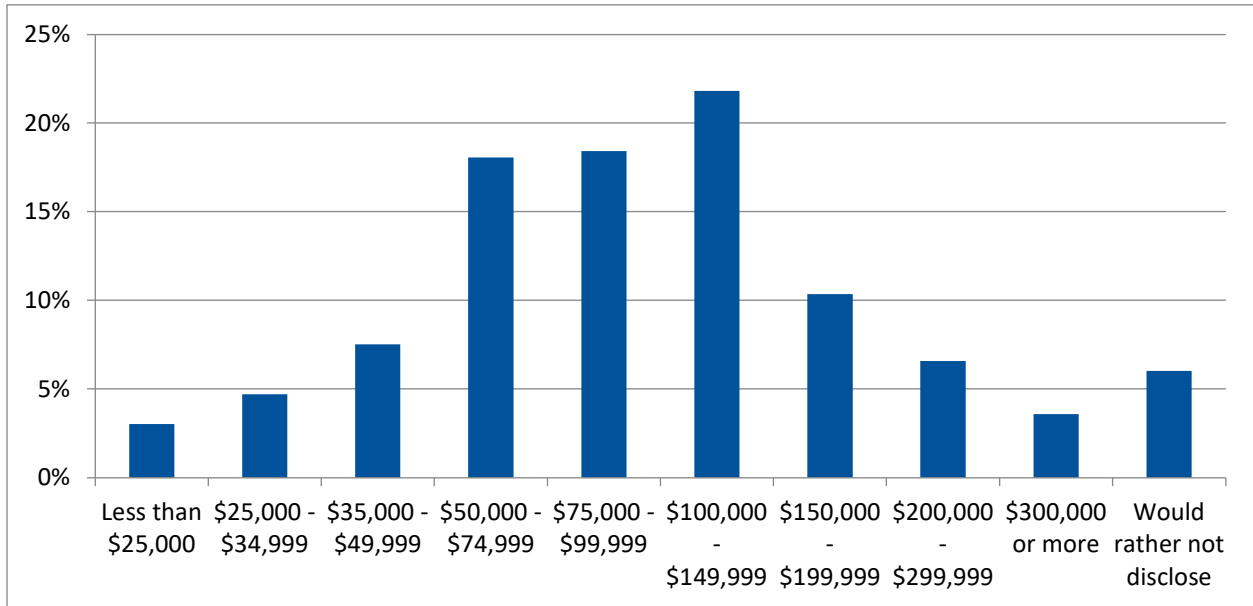
**33. How many are in your household (including yourself)?**



The average household size for respondents was 2 adults over the age of 18 with one child 18 or younger. This data shows potential housing demand for 2 and 3 bedroom rental or for-sale units.

N=532

**34. What category best describes the gross annual income for you and family members that live with you (do not include income from unrelated roommates)?**



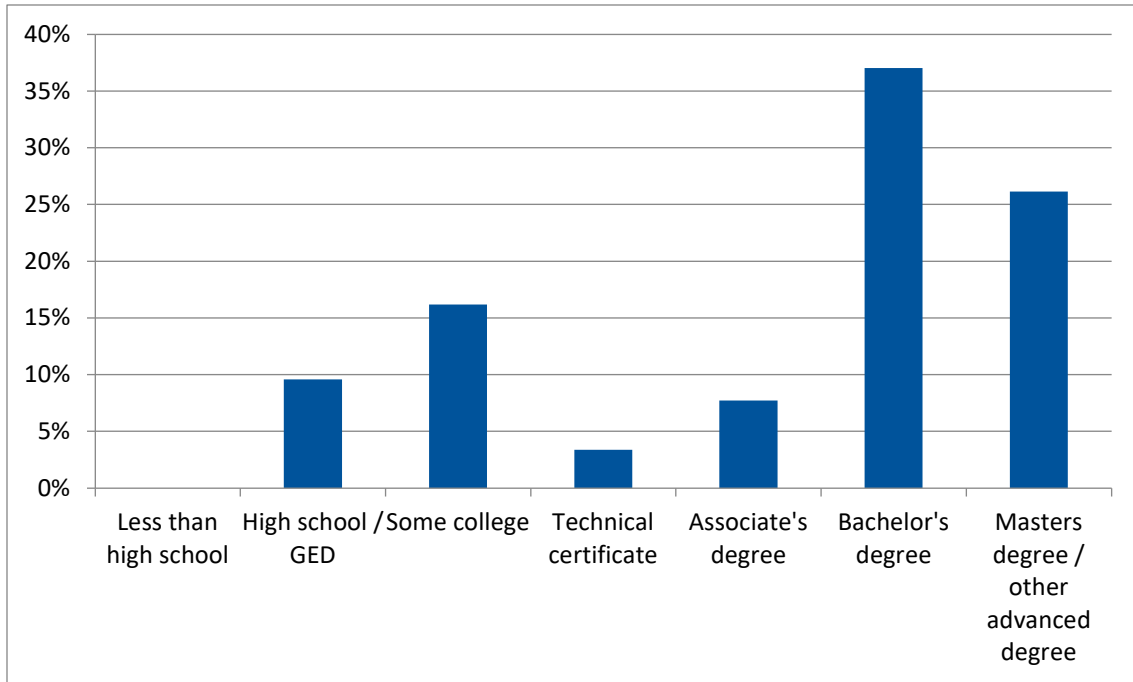
	Respondents	Share
\$0-\$49,999	81	15%
\$50,000-\$99,999	194	36%
\$100,000-\$300,000+	257	48%

Almost half of respondents made \$100,000 or more.

N=532

Almost 35% of renter respondents made \$50,000-\$74,999 showing demand and support for additional market rate apartment rental units in Brenham.

**35. What is the highest level of educational attainment in your household?**



More than 35% of respondents said they had a Bachelor's degree and about 25% had a Masters degree or other advanced degree.

N=532

Renters were 30% some college and 30% Bachelor's degree showing that renter respondents had a relatively high educational attainment.

Less than \$50,000 respondents had at least a high school degree / GED.

## APPENDIX B: EMPLOYEE SURVEY

### BRENHAM | WASHINGTON COUNTY ECONOMIC DEVELOPMENT

# WORKFORCE HOUSING SURVEY

**\*Survey respondents must be employed in Washington County**

*If your place of employment is located outside of Washington County, please refrain from taking the survey.*

Brenham | Washington County Economic Development is sharing this survey in order to enhance the city's Housing Needs Assessment currently underway. A variety of quality and affordable housing options is important for any community. This survey and the Needs Assessment will help Brenham public agencies and the housing development industry better understand the community's present housing situation. The results could lead to beneficial policy changes and potential new housing choices for the community and its workforce.

The results of this survey will be made available to the general public and community leaders. By donating a few minutes of your time, you will help decision makers by providing information to best address Brenham's housing needs.

If you'd like to be entered for a chance to win a YETI cooler, you have the option to provide a cell phone number to be notified by text at the end of this survey. This survey is otherwise **anonymous and confidential**, and all information collected will be displayed in aggregate only. Your help will provide vital input from the community.

Please take a few minutes to complete the survey. **Thank you!**

1. What best describes the employment status for your household's primary income provider(s)?  
 Employed full time in Washington County by one employer

Employed part time in Washington County by one or more employer(s)

Local independent contractor / self-employed

Out of town visiting / contractor / temporary worker at Washington County employer

Student

Retired or disabled

In between jobs or unemployed by choice

2. About how long have you lived in Brenham or Washington County? (check one)  
 Less than one year

1 - 2.9 years

3 - 4.9 years

5 - 9.9 years

10 - 14.9 years

\_\_\_\_ 15 years or more

\_\_\_\_ I don't live in Brenham or Washington County

3. About how long have you worked in the Brenham area? (check one)

\_\_\_\_ Less than one year

\_\_\_\_ 1 - 2.9 years

\_\_\_\_ 3 - 4.9 years

\_\_\_\_ 5 - 9.9 years

\_\_\_\_ 10 - 14.9 years

\_\_\_\_ 15 years or more

4. How far do you commute to work each day? (check one)

0 to 5 miles

10 to 25 miles

5 to 10 miles

25 or more miles

5. What is the way you have secured housing at the present time?

I own my home

My employer has provided my living space

I rent my home

I have another living arrangement (please

I stay in a movable RV / camper

describe):

6. What is the typical amount of your household's monthly mortgage or rent payment?

Under \$500

\$500 - \$749

\$750 - \$999

\$1,000 - \$1,249

\$1,250 - \$1,499

\$1,500 - \$1,749

\$1,750 - \$1,999

\$2,000 - \$2,249

\$2,250 - \$2,499

\$2,500 or more

Not applicable

7. Please describe the physical structure of your current residence (pick one):

Site-built single family detached home (house built on-site, as opposed to manufactured or mobile homes) on less than 5 acre lot

Mobile or manufactured home on long term / permanent site less than 5 acres

Residence on 5 acres or greater

Duplex / triplex / quadplex

Small multi-unit property (5-9 units)

Moderate-sized multi-unit property (10-30 units)

Large multifamily complex (over 30 units)

Recreational vehicle / trailer in temporary or seasonal location

Other

8. Please state the 5-digit ZIP code of your current residence: ZIP code: \_\_\_\_\_

9. Where do you currently live while working in the Brenham area? (check one)

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Brenham   | <input type="checkbox"/> Chappell Hill                               | <input type="checkbox"/> Burton                              |
| <input type="checkbox"/> Other Washington County                               | <input type="checkbox"/> Somerville (skip to Q12)                    | <input type="checkbox"/> Other Burleson County (skip to Q12) |
| <input type="checkbox"/> Round Top / Carmine (skip to Q12)                     | <input type="checkbox"/> Other Fayette County (skip to Q12)          | <input type="checkbox"/> Lee County (skip to Q12)            |
| <input type="checkbox"/> Bryan / College Station / Brazos County (skip to Q12) | <input type="checkbox"/> Bellville (skip to Q12)                     | <input type="checkbox"/> Other Austin County (skip to Q12)   |
| <input type="checkbox"/> Navasota (skip to Q12)                                | <input type="checkbox"/> Other Grimes County (skip to Q12)           | <input type="checkbox"/> Hempstead (skip to Q12)             |
| <input type="checkbox"/> Prairie View (skip to Q12)                            | <input type="checkbox"/> Waller (skip to Q12)                        | <input type="checkbox"/> Other Waller County (skip to Q12)   |
| <input type="checkbox"/> Cypress / Hockley (skip to Q12)                       | <input type="checkbox"/> Houston / other Harris County (skip to Q12) |  |
| <input type="checkbox"/> Other place not listed (skip to Q12)                  |  |  |



10. (if your response in Q9 did not tell you to skip) What do you like best about living in Washington County? (Choose UP TO THREE things – you may offer your own opinion as one choice by choosing “Other” and writing in a description.)

- |   |  |
|---|--|
| <input type="checkbox"/> Family-friendly community                | <input type="checkbox"/> Low cost of living                      |
| <input type="checkbox"/> Public parks and recreational facilities | <input type="checkbox"/> Arts and culture                        |
| <input type="checkbox"/> Public schools                           | <input type="checkbox"/> Nearby medical / health care facilities |
| <input type="checkbox"/> Quality of housing and neighborhoods     | <input type="checkbox"/> Proximity to workplace / commute        |
| <input type="checkbox"/> Limited traffic congestion               | <input type="checkbox"/> Family / friends                        |
| <input type="checkbox"/> Outdoors / natural amenities             |  |
| <input type="checkbox"/> Other _____                              |  |

11. What do you like least about living in Washington County, compared to other places? (Choose UP TO THREE things– you may offer your own opinion as one choice after “Other”) (skip to Q13)

- |  |   |
|--|---|
| <input type="checkbox"/> Limited housing quality and availability            | <input type="checkbox"/> Limited arts, culture, and entertainment scene |
| <input type="checkbox"/> Housing prices                                      | <input type="checkbox"/> Limited shopping                               |
| <input type="checkbox"/> Lack of large masterplanned communities             | <input type="checkbox"/> Limited dining and drinking places             |
| <input type="checkbox"/> Lack of walkability                                 | <input type="checkbox"/> Public school quality                          |
| <input type="checkbox"/> Limited entertainment / family activities           | <input type="checkbox"/> Safety / security concerns                     |
| <input type="checkbox"/> Availability of child care                          | <input type="checkbox"/> Taxes  |
| <input type="checkbox"/> Limited range of career / employment options nearby | <input type="checkbox"/> Other _____                                    |

12. Why do you live where you do now rather than the Brenham area? (Choose UP TO THREE things – you may offer your own opinion as one choice by choosing “Other” and writing in a description)

- Prefer more rural setting / large acreage property outside incorporated towns
- Current area offers better housing types / supply
- Current area has better housing prices
- Current area has higher quality neighborhoods / developments
- Long-time resident / family established in current community
- Responsibility to manage family land
- Better access to more job opportunities for myself
- Commute / job access easier for other family members
- School district preference

\_\_\_\_\_ Safer environment (crime, etc.)

\_\_\_\_\_ Better recreational / cultural / social activities in current area

\_\_\_\_\_ Better shopping and dining options in current area

\_\_\_\_\_ Other

13. What do you think are the most important changes needed to provide more supply and choices for housing for Brenham area workers and families? (Choose UP TO FOUR things – you may offer your own opinion as a choice after “Other”)

Provide more “entry-level” subdivisions of lower-priced, for-sale single family detached homes

Provide more upscale, “move-up” single family detached housing in small subdivisions without amenities

Provide a large masterplanned community with a variety of housing types and community recreational and open space amenities

Provide denser, lower-maintenance types of for-sale housing, such as townhomes, patio homes and condominiums

Provide new development of grouped single family detached homes for-rent where the landlord / manager performs yard and house maintenance

Provide dense urban homes and lofts in or near downtown Brenham

Provide new, upscale complexes of apartments and rental housing with many on-site amenities, luxury finishes and appliances

Provide new moderately priced apartments with “basic” amenities, finishes and appliances

Provide new lower-priced apartments restricted only to tenants with lower incomes (tax credit or other subsidized rental housing)

Provide new large-lot subdivisions for custom homes in Washington County outside of Brenham

Provide subdivisions for modular or manufactured homes

Provide more mobile home and RV parks

Provide new modular / manufactured / mobile / tiny homes on permanent or long term sites

Preserve and rehab / renovate existing lower cost and older housing

Encourage small-scale rental units (garage apartments, duplexes / triplexes, etc.) on “infill” sites

Other \_\_\_\_\_

14. How long have you lived at your current place of residence?

Less than 1 year

1-3 years

3-5 years

5-10 years

Over 10 years (skip to Q17)

15. When you last moved, which of these statements best describes the experience of your household in finding new housing, with regards to your housing needs and budget?

\_\_\_\_\_ Housing was EASILY found to match the needs AND budget of my household.

\_\_\_\_\_ Housing was found to match the needs AND budget of my household WITH DIFFICULTY.

\_\_\_\_\_ Housing was found to match the needs of my household, BUT NOT my household's budget.

\_\_\_\_\_ Housing was found to match the budget of my household, BUT NOT its needs.

\_\_\_\_\_ NO housing was found to match my household's budget NOR its needs.

16. If you wish, please add comments about your experience finding a home that met your needs and budget:

---

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17. Are there any reasons that make you desire or need to move to a different home at the present time?

*Pick all that apply.*

Nothing, I am satisfied with my current residence and would not consider moving (skip to Q27)

Dissatisfied with design or condition of current home

Will be leaving current household group / family

Need a larger home

Need a smaller home

Want a larger lot

Want a smaller lot

Want a different home location / neighborhood

Prefer another school district

Want to be closer to work

Want to switch from renting to owning

Want to switch from owning to renting

Want to share a home with fewer people

Want to lower my housing costs

Will be relocating away from this part of Texas

Other reason: \_\_\_\_\_

18. Would you plan to own or rent if you were to move now?

Own

Rent

Don't know

19. What is the maximum you would be willing to pay for your next home, per month?

Under \$500

\$500 - \$749

\$750 - \$999

- \$1,000 - \$1,249
- \$1,250 - \$1,499
- \$1,500 - \$1,749
- \$1,750 - \$1,999
- \$2,000 - \$2,499
- \$2,500 - \$2,999
- \$3,000 and over
- Not applicable

20. Given your financial, employment, and family situations, plus personal preferences, which housing type would be the best fit for you?:

\_\_\_ "Garden" or "suburban" multifamily apartment

\_\_\_ "Urban" or "downtown" apartment / loft / condominium / townhome

\_\_\_ Accessory apartment or room in shared single family home

\_\_\_ Duplex / triplex / fourplex

\_\_\_ Attached townhome

\_\_\_ Patio / garden / zero-lot-line home

\_\_\_ Site-built single family detached home on regular lot in town or suburban subdivision

\_\_\_ Single family home on oversize lot outside city limits

\_\_\_ Rural farm / ranch

\_\_\_ Mobile / tiny or manufactured home on long term / permanent site

\_\_\_ Recreational vehicle / trailer in temporary or seasonal location

\_\_\_ Other\_

21. What do you consider to be the most important factors in selecting your housing type and location? Check UP TO FIVE.

\_\_\_ Size / number of bedrooms

\_\_\_ Pets allowed / accommodated

\_\_\_ Floor plan / layout

\_\_\_ Neighborhood character / amenities

\_\_\_ Condition / need for repairs or rehab

\_\_\_ Need for remodeling / decorative updates

\_\_\_ Age of home

\_\_\_ Not in floodplain

\_\_\_ Distance from chemical / industrial plants

\_\_\_ Lot / yard size / landscaping / pool

\_\_\_ Amount of up-front cash payment required

\_\_\_ Monthly rent or mortgage payment

\_\_\_ Price appreciation / investment potential

\_\_\_ Lease length / term

\_\_\_ Architectural quality / style / details

- \_\_\_\_ Safety / security / crime
- \_\_\_\_ Neighborhood with HOA and deed restrictions
- \_\_\_\_ No HOA or deed restrictions
- \_\_\_\_ Public school quality
- \_\_\_\_ Proximity to health care / medical facilities
- \_\_\_\_ Proximity to schools
- \_\_\_\_ Property taxes
- \_\_\_\_ Proximity to workplace / commute
- \_\_\_\_ Proximity to shopping, dining, and services
- \_\_\_\_ Proximity to entertainment,  
cultural, and social amenities
- \_\_\_\_ Proximity to parks, community  
open space, and outdoor  
recreational facilities
- \_\_\_\_ Sidewalks and walkability
- \_\_\_\_ Other



22. Would you prefer new construction or an existing home for your next residence?

\_\_\_\_ New construction

\_\_\_\_ Existing home

\_\_\_\_ Either / no preference

23. What is the minimum size of your next residence that you would consider?

\_\_\_\_ Under 600 square feet

\_\_\_\_ 1,500 – 1,799 square feet

\_\_\_\_ 600 – 899 square feet

\_\_\_\_ 1,800 – 2,399 square feet

\_\_\_\_ 900 – 1,099 square feet

\_\_\_\_ 2,400 – 2,999 square feet

\_\_\_\_ 1,200 – 1,499 square feet

\_\_\_\_ 3,000 square feet and larger

24. What is the room plan you would most desire for your next residence?

\_\_\_\_ Studio or small 1 bedroom

\_\_\_\_ Larger 1 bedroom or 1 bedroom with den

\_\_\_\_ 2 bedroom

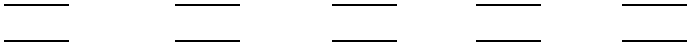
\_\_\_\_ 3 bedroom

\_\_\_\_ 4 or more bedrooms

25. If your preferred housing type was available at or below your maximum price in any of the areas indicated below, how likely would you be to consider moving there?

	<b>Very Unlikely</b>	<b>Somewhat Unlikely</b>	<b>Neutral</b>	<b>Somewhat Likely</b>	<b>Very Likely</b>
Brenham	_____	_____	_____	_____	_____
Chappell Hill	_____	_____	_____	_____	_____
Burton	_____	_____	_____	_____	_____
Other Washington County	_____	_____	_____	_____	_____
Somerville	_____	_____	_____	_____	_____
Other Burleson County	_____	_____	_____	_____	_____
Round Top / Carmine	_____	_____	_____	_____	_____
Other Fayette County	_____	_____	_____	_____	_____
Lee County	_____	_____	_____	_____	_____
Bryan / College Station / Brazos County	_____	_____	_____	_____	_____
Navasota	_____	_____	_____	_____	_____
Other Grimes County	_____	_____	_____	_____	_____
Bellville	_____	_____	_____	_____	_____
Other Austin County	_____	_____	_____	_____	_____
Hempstead	_____	_____	_____	_____	_____
Prairie View	_____	_____	_____	_____	_____
Waller	_____	_____	_____	_____	_____
Other Waller County	_____	_____	_____	_____	_____

Cypress / Hockley  
Houston / Harris County



26. For the room plan identified in the previous question that offers your most desired features, what amount would you and family members you live with be willing to be responsible for **per month** in either mortgage, taxes and insurance cost (if buying) or rental payment? (*enter a numerical cost between \$0 and \$10,000; do NOT include contribution from additional unrelated roommates*)

Monthly cost: \_\_\_\_\_

27. Which of these categories matches your age in years?

\_\_\_\_ Under 25

\_\_\_\_ 25 – 34

\_\_\_\_ 35 – 44

\_\_\_\_ 45 – 54

\_\_\_\_ 55 – 64

\_\_\_\_ 65 or older

28. Gender:

\_\_\_\_ Male

\_\_\_\_ Female

29. Do you live with a spouse or partner?

\_\_\_\_ Yes      \_\_\_\_ No (Skip to Q32)

30. Please select the best description of your spouse's/partner's employment status.

\_\_\_\_ Employed full time outside of the home in Brenham / Washington County (skip to Q32)

\_\_\_\_ Employed part time outside of the home in Brenham / Washington County (skip to Q32)

\_\_\_\_ Employed and works at home (skip to Q32)

\_\_\_\_ Employed and works outside of Brenham / Washington County

\_\_\_\_ Student / intern outside of the home

\_\_\_\_ Not employed nor in school / internship (skip to Q32)

31. Where is your spouse's or partner's current geographic location (city or town) of employment or schooling (name closest city or town)?

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32. How long do you expect to continue working or going to school in Brenham / Washington

County?

\_\_\_\_ Less than 18 months

\_\_\_\_ 3 – 5 years

\_\_\_\_ 18 months – 3 years

\_\_\_\_ More than 5 years

33. How many are in your household (including yourself)?

\_\_\_\_ Adults over age 18

\_\_\_\_ Children age 18 and younger (put "0" if none)

34. What category best describes the gross annual income for you and family members that live with you (do not include income from unrelated roommates)?

- |  |  |
|--|--|
| <input type="checkbox"/> Less than \$25,000  | <input type="checkbox"/> \$100,000 - \$149,999     |
| <input type="checkbox"/> \$25,000 - \$34,999 | <input type="checkbox"/> \$150,000 - \$199,999     |
| <input type="checkbox"/> \$35,000 - \$49,999 | <input type="checkbox"/> \$200,000 - \$299,999     |
| <input type="checkbox"/> \$50,000 - \$74,999 | <input type="checkbox"/> \$300,000 or more         |
| <input type="checkbox"/> \$75,000 - \$99,999 | <input type="checkbox"/> Would rather not disclose |

35. What is the highest level of educational attainment in your household?

- |  |  |
|--|--|
| <input type="checkbox"/> Less than high school | <input type="checkbox"/> Associate's degree                      |
| <input type="checkbox"/> High school / GED     | <input type="checkbox"/> Bachelor's degree                       |
| <input type="checkbox"/> Some college          | <input type="checkbox"/> Master's degree / other advanced degree |
| <input type="checkbox"/> Technical certificate |  |

If you'd like a chance to win a YETI cooler, please enter a cell phone number to be notified via text:

\_\_\_\_\_

Thank you very much for taking the time to complete this survey. As mentioned previously, your input will help decision makers in Brenham and Washington County have the information they need to plan for the future. Please visit the following website for more information about Brenham: [www.cityofbrenham.org](http://www.cityofbrenham.org). For more information on economic development in Brenham, please visit [www.brenhamed.com](http://www.brenhamed.com).



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