



Planning Commission 12/15/2025

Notice is hereby given of a regular meeting of the Planning Commission of the City of San Angelo to be held on December 15, 2025 at 9:00 AM at City Hall – East Mezzanine, 72 W. College Ave., San Angelo, Texas, for the purpose of considering the following agenda items.

I. Call to Order

II. Public Comment

Issues or concerns not on the Regular Agenda may be raised by the public at this time. Citizens should speak from the podium, address all comments to the dais, begin by stating their name and address or Single Member District number, and limit their remarks to less than three minutes.

III. Consent Agenda

The Commission may request for a Consent Agenda item to be moved to the Regular Agenda for presentation and public comment, otherwise the Consent Agenda will be considered in one vote. All items on the consent agenda have been recommended for approval by staff with no opposition received to date. Since some items on the Consent Agenda may require a public hearing, the Commission will accept public comment on any item on the Consent Agenda in one public hearing.

- A. **Meeting Minutes:** Consider approving the meeting minutes from November 17, 2025.
- B. **FP25-27 Jim Farr Subdivision Section 3 (SMD#2):** A request to final plat Jim Farr Subdivision, Section 3, Lot 4, located at 3802 Crockett St.
- C. **RP25-38 First Replat of Hatcher Addition Block 61 (SMD#2):** A request for first replat of Hatcher Addition, Block 61 creating a third lot, Lot 7A, from Lots 7 & 8 located at 2516 Waco St.
- D. **RP25-42 First Replat of Fort Concho Addition Block 99 (SMD #3):** A request for a First Replat to combine lots 7, 8, and 9 in Block 99, South part of Fort Concho Addition located at the northwest corner of E Avenue K and Duggan St.

IV. Regular Agenda

A. Subdivision Plats

The Planning Commission has final authority for approval; appeals may be directed to City Council.

- 1. **FP25-25 Pradon Subdivision Section 1 (ETJ):** A request to Final Plat creating two lots over 7.00 acres within the City's Extra-Territorial Jurisdiction (ETJ), as well as a variance request for paving and curb/gutter along Spillway Road.
- 2. **FP25-26 Southland Hills Addition Section 29 (SMD#1):** A request to final plat 25 lots over 6.106 acres within the PD22-03 zoning district, a request for approval of a variance for

right-of-way on Valleyview Boulevard, and a request for approval of a variance for the paving width of College Hills Boulevard.

3. **RP25-39 Third Replat of Bell's Addition Block 20 (SMD# 4):** A request for a Third Replat to create four new lots in Block 20 of Bell's Addition, with a variance request to not construct curb and gutter along Montague Street.
4. **RP25-40 Second Replat of Old Christoval Road Industrial Park, Block 4, Section 2 (SMD#1):** A request to replat a portion of a lot into two lots over 5.786 acres within the Heavy Commercial (CH) zoning district, as well as a variance request for excessive block length

B. Rezoning and Comprehensive Plan Amendments

City Council has final authority for approval of rezonings and amendments to the Comprehensive Plan.

1. **Z25-25 Northwest Dr & Arden Rd (SMD#6):** A request for a zone change from Heavy Commercial (CH) to Low-Rise Multifamily (RM-1) at a property located west of the intersection of Arden Rd & Northwest Dr.
2. **Z25-26 2719 Waco St (SMD#2):** A request for a zone change from Single-Family Residential (RS-1) to the Two-Family Residential (RS-2) zoning district located at 2719 Waco St.
3. **Z25-27 E Avenue K & Duggan St (SMD#3):** A request for a zone change from General/Heavy Commercial (CG/CH) to a Low-Rise Multifamily Residential (RM-1) located west of the intersection of E Ave K & Duggan St.
4. **Z25-28 3110, 3114, 3118, & 3122 Waco St (SMD#2):** A request for a zone change from Single-family Residential (RS-1) to Neighborhood Commercial (CN) located at 3110, 3114, 3118, & 3122 Waco St.

V. Planning Director's Report

- A. Discussion and update on the San Angelo ResIntel Housing Study 2024 Update

VI. Follow Up and Administrative Issues

- A. The next regular meeting of the Planning Commission is scheduled to begin on **Monday, January 26, 2026 at 9am** in the East Mezzanine in City Hall at 72 W College Ave.

VII. Adjournment

CERTIFICATION

I hereby certify that the above notice of meeting was posted on the bulletin board at the City Hall of the City of San Angelo, Texas, on the 9th day of December 2025, at 4:52 p.m.



Aaron Vannoy, Director of Planning and
Development Services

All agenda items are subject to action. The Planning Commission reserves the right to consider business out of posted order.

In compliance with the Americans with Disabilities Act, the City of San Angelo will provide for reasonable accommodations for persons attending board or commission meetings. To better serve you, requests should be received 48 hours prior to the meetings. Please contact the ADA Coordinator at 325-657-4407 for request, or by completing a request form online at cosatx.us/ada.

PLANNING COMMISSION – December 15, 2025
STAFF REPORT

APPLICATION TYPE:		CASE:	
Final Plat		FP25-27: Jim Farr Subdivision Sec 3, Lot 4	
SYNOPSIS:			
A request to final plat Jim Farr Subdivision, Section 3, Lot 4, located at 3802 Crockett St.			
LOCATION:		LEGAL DESCRIPTION:	
3802 Crockett St		Acres: 0.168, Abst: A-7985 S-0182, Survey: JIM FARR, 0.1700 ACRES	
SM DISTRICT / NEIGHBORHOOD:		ZONING:	FUTURE LAND USE:
District #2 – Joe Self Neighborhood – Lake View		Single-family Residential (RS-1)	Neighborhood
SIZE:			
0.168 acres			
THOROUGHFARE PLAN:			
Crockett St – local road with 45’ of ROW currently but they are dedicating 5’ to make 50’; 30’ of paving width with existing curb and gutter			
STAFF RECOMMENDATION:			
Staff recommend APPROVAL of the request to final plat of Jim Farr Subdivision, Section 3, Lot 4 subject to two (2) conditions of approval.			
PROPERTY OWNER/PETITIONER:			
Owner: Miguel Duran Petitioner: SKG Engineering			
STAFF CONTACT:			
Rae Lineberry Lead Planner (325) 657-4210, Extension 1533 Rae.lineberry@sanangelo.gov			

Conformity with Comprehensive Plan and Purpose Statements:

This Final Plat is located in the 3800-block of Crockett St. The lot is currently abstract and will create 1 new single-family residential lot. This plat conforms with our Comprehensive Plan and Purpose Statements.

Recommendation:

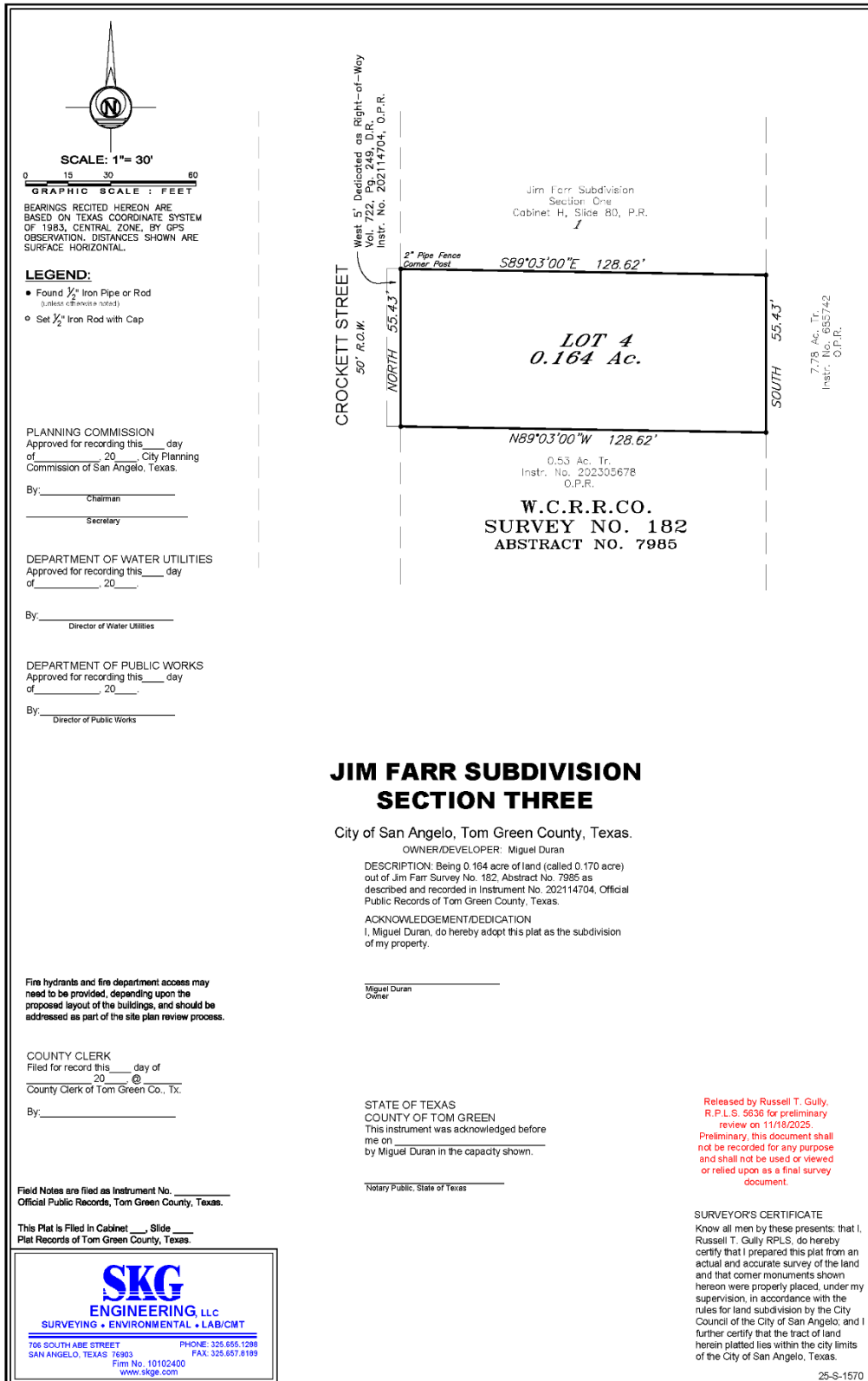
Staff recommend **APPROVAL** of the request to final plat of Jim Farr Addition, Section 3, Lot 4 subject to **two (2)** conditions of approval:

- 1) Prior to plat recordation, provide necessary water and wastewater service lines to each new lot. [Land Development and Subdivision Ordinance, Chapter 11.I.B.2 & Chapter 12.I.A.1] Alternatively, request to the Department of Public Works the deferral of such requirement to a later stage of development. [Land Development and Subdivision Ordinance, Chapter 11.I.B.2]
- 2) Prior to plat recordation, submit a revised plat, illustrating the intersection of E 38th St and Crockett St.

Attachments:

Final Plat

Final Plat



PLANNING COMMISSION – December 15, 2025
STAFF REPORT



APPLICATION TYPE:		CASE:	
Replat		RP25-38: Hatcher Addition, Block 61	
SYNOPSIS:			
A request for 1st replat of Hatcher Addition, Block 61 creating a third lot, Lot 7A, from Lots 7 & 8 located at 2516 Waco St.			
LOCATION:		LEGAL DESCRIPTION:	
2516 Waco St		Acres: 0.147, Blk: 61, Subd: HATCHER ADDITION, S64 FT OF LOTS 7 & 8	
SM DISTRICT / NEIGHBORHOOD:		ZONING:	FUTURE LAND USE:
SMD #2 – Joe Self Neighborhood – Bluffs		Single-family Residential (RS-1)	Neighborhood
SIZE:			
.147 acres			
THOROUGHFARE PLAN:			
<i>Waco St</i> – classified as a local road, paving width 30ft, r-o-w 60ft. <i>N Campus Blvd</i> – classified as a local road, paving width 36ft, r-o-w 56ft.			
STAFF RECOMMENDATION:			
Staff recommend APPROVAL of the replat for Hatcher Addition, Block 61 with 2 conditions.			
PROPERTY OWNER/PETITIONER:			
Owner: Miguel Duran Petitioner: SKG Engineering			
STAFF CONTACT:			
Rae Lineberry Lead Planner (325) 657-4210, Extension 1533 Rae.lineberry@sanangelo.gov			

Conformity with Comprehensive Plan and Purpose Statements: The proposed replat is combining the back portion of lots 7 & 8 into one lot (7A) for single-family housing. The plat will conform to the purpose statements outlined in Chapter 2 of the Land Development and Subdivision Ordinance (LDSO).

Recommendation: Staff recommend **APPROVAL** of the replat for Hatcher Addition, Block 61 with 2 conditions.

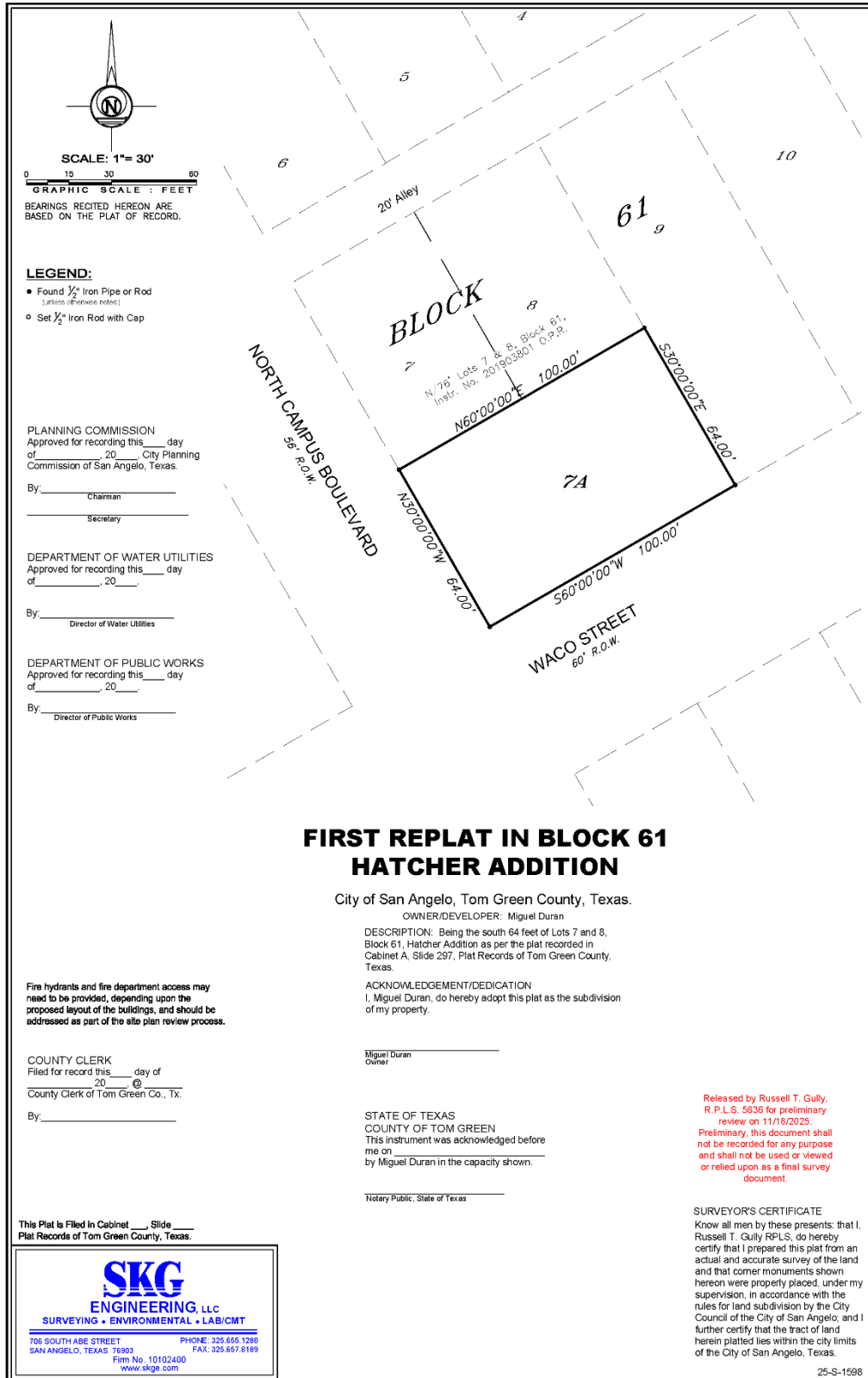
Conditions

1. Prior to plat recordation, install necessary water service lines. [Land Development and Subdivision Ordinance, Chapter 11.I.B.2 & Chapter 12.I.A.1] Alternatively, request to the Department of Public Works the deferral of such requirement to a later stage of development. [Land Development and Subdivision Ordinance, Chapter 11.I.B.2].
2. Prepare and submit plans for approval, illustrating the proposed extension of a sewer main and required service connections [Land Development and Subdivision Ordinance, Chapter 12.I.A, City of San Angelo Standards & Specifications] and complete the installation in accordance with the approved version of these plans [Land Development and Subdivision Ordinance, Chapter 12.I.B].

Attachments:

Final Plat

Final Plat



**FIRST REPLAT IN BLOCK 61
HATCHER ADDITION**

City of San Angelo, Tom Green County, Texas.

OWNER/DEVELOPER: Miguel Duran

DESCRIPTION: Being the south 64 feet of Lots 7 and 8, Block 61, Hatcher Addition as per the plat recorded in Cabinet A, Slide 297, Plat Records of Tom Green County, Texas.

ACKNOWLEDGEMENT/DEDICATION
I, Miguel Duran, do hereby adopt this plat as the subdivision of my property.

Miguel Duran
Owner

STATE OF TEXAS
COUNTY OF TOM GREEN
This instrument was acknowledged before me on _____
by Miguel Duran in the capacity shown.

Notary Public, State of Texas

Released by Russell T. Gully,
R.P.L.S. 5835 for preliminary
review on 11/16/2025.
Preliminary, this document shall
not be recorded for any purpose
and shall not be used or viewed
or relied upon as a final survey
document.

SURVEYOR'S CERTIFICATE
Know all men by these presents: that I, Russell T. Gully RPLS, do hereby certify that I prepared this plat from an actual and accurate survey of the land and that corner monuments shown hereon were properly placed, under my supervision, in accordance with the rules for land subdivision by the City Council of the City of San Angelo, and I further certify that the tract of land herein platted lies within the city limits of the City of San Angelo, Texas.

25-S-1598

Fire hydrants and fire department access may need to be provided, depending upon the proposed layout of the buildings, and should be addressed as part of the site plan review process.

COUNTY CLERK
Filed for record this _____ day of _____, 20____ @
County Clerk of Tom Green Co., Tx.
By: _____

This Plat is Filed in Cabinet _____, Slide _____
Plat Records of Tom Green County, Texas.

SKG
ENGINEERING, LLC
SURVEYING • ENVIRONMENTAL • LAB/CMT

706 SOUTH ABE STREET PHONE: 325.655.1288
SAN ANGELO, TEXAS 76903 FAX: 325.657.8189
Firm No. 10102400
www.skgb.com

**PLANNING COMMISSION – December 15, 2025
STAFF REPORT**



APPLICATION TYPE:		CASE:	
Replat		RP25-42: Fort Concho Addition First Replat Blk 99	
SYNOPSIS:			
A request for a first Replat to combine lots 7, 8, and 9 in Block 99, South part of Fort Concho Addition			
LOCATION:		LEGAL DESCRIPTION:	
E Ave K and Duggan Street		Acres: 0.195, Lot: 9, Blk: 99, Subd: FORT CONCHO ADDITION Acres: 0.195, Lot: 8, Blk: 99, Subd: FORT CONCHO ADDITION Acres: 0.195, Lot: 7, Blk: 99, Subd: FORT CONCHO ADDITION	
SM DISTRICT / NEIGHBORHOOD:	ZONING:	FUTURE LAND	SIZE:
District #3 – Harry Thomas Ft. Concho Neighborhood	General/Heavy Commercial (CG/CH) – Zone change requested to RM-1	Industrial and Neighborhood Center	0.585 acres
THOROUGHFARE PLAN:			
Duggan St – local road – ROW is 60’ – Paving width 36’ E Ave K – local road – ROW is 77’ – Paving Width is 54’			
NOTIFICATIONS:			
N/A			
STAFF RECOMMENDATION:			
Staff recommend <u>APPROVAL</u> of the request to Replat, subject to three (3) Conditions of Approval.			
PROPERTY OWNER/PETITIONER:			
Owner: Zill Properties Petitioner: Wilde Engineering			
STAFF CONTACT:			
Arden Neff Planner (325) 657-4210, Ext. 1186 arden.neff@sanangelo.gov			

Conformity with Comprehensive Plan and Purpose Statements:

The applicant intends to combine lots 7, 8, and 9 into one 0.585 acre lot to be used for duplexes under the proposed Low-Rise Multifamily zone change request. This development will match a similar multifamily development recently begun directly to the east.

Recommendation:

Staff recommend **APPROVAL** of the request to Replat, subject to **three (3) Conditions of Approval:**

1. Prior to plat recordation, Install necessary water and wastewater service lines to each new lot. [Land Development and Subdivision Ordinance, Chapter 11.I.B.2 & Chapter 12.I.A.1]
2. Prior to plat recordation, submit a revised plat correcting “Avenue K” to “East Avenue K”.
3. Prior to plat recordation, submit a revised plat correcting “Avenue L” to “East Avenue J” to the north of E Avenue K.

Attachments:

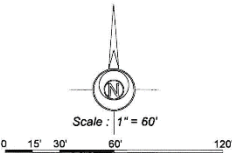
Plat

1ST REPLAT IN BLOCK 99, SOUTH PART OF FORT CONCHO ADDITION

City of San Angelo, Tom Green County, Texas

OWNER: ZW Holdings, LLC

DESCRIPTION: Being Lots 7, 8, and 9, Block 99, South Part of Fort Concho Addition, City of San Angelo, Tom Green County, Texas, according to the Plat recorded in Volume 26, Page 330 of the Deed Records of Tom Green County, Texas.



Bearings and distances hereon are of the Texas Coordinate System Central Zone NAD83.

LEGEND: o - Set 5/8" Iron Rod w/Cap

CITY PLANNING COMMISSION

Approved for recording this ____ day
 of _____, 20__

By: _____
 Chairman

By: _____
 Secretary

DEPARTMENT OF WATER UTILITIES

Approved for recording this ____ day
 of _____, 20__

By: _____
 Director of Water Utilities

DEPARTMENT OF PUBLIC WORKS

Approved for recording this ____ day
 of _____, 20__

By: _____
 Director of Public Works

ACKNOWLEDGEMENT/DEDICATION

We, ZW Holdings, LLC, do hereby adopt this plat as a subdivision of our property and dedicate for the use of the public the streets, easements, and drainage way shown hereon.

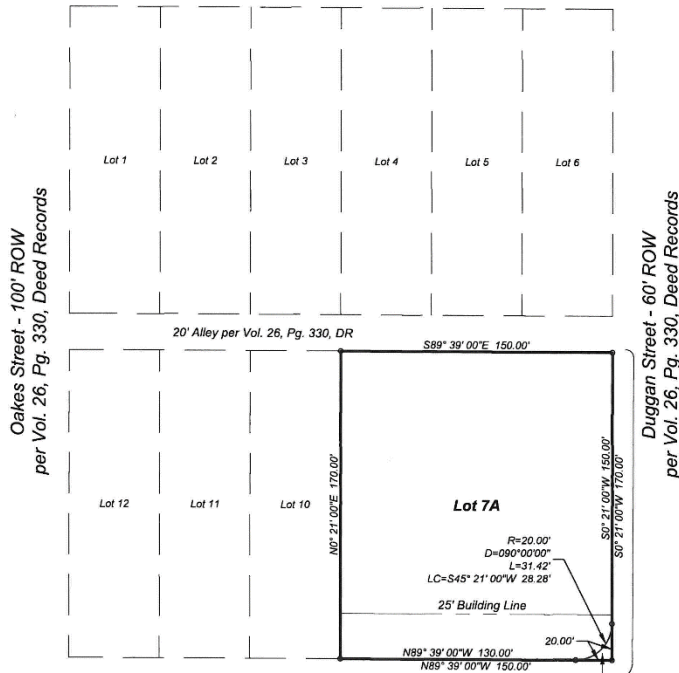
 Zane Willard

STATE OF TEXAS
 COUNTY OF TOM GREEN
 This instrument was acknowledged before me on

 by Zane Willard

 Notary Public, State of Texas

Avenue L - 77' ROW
 per Vol. 26, Pg. 330, Deed Records



Avenue K - 77' ROW
 per Vol. 26, Pg. 330, Deed Records

86 square feet hereby
 dedicated as
 right-of-way

COUNTY CLERK
 Filed for record this ____ day of _____, 20__ @ _____

By: _____

SURVEYOR'S CERTIFICATE

Know all men by these presents: that I, Blake Wilde, RPLS, do hereby certify that I prepared this plat from an actual and accurate survey of land and that corner monuments shown hereon were properly placed, under my supervision, in accordance with the rules for land subdivision by the City Council of the City of San Angelo, and I further certify that the tract of land herein platted lies within the City Limits of the City of San Angelo, Texas, as established by law.



This document is released for the purpose of interim review under the authority of Blake Wilde, RPLS 6759 on September 18, 2025. Preliminary, this document shall not be recorded for any purpose and shall not be used or viewed or relied upon as a final survey document.

BLAKE WILDE
 REGISTERED PROFESSIONAL LAND SURVEYOR NO. 6759
 Wilde Engineering and Surveying, LLC 5770 FM 765, San Angelo, TX 76905 325.215.4332
 Firm # 24672 & 10194849
 www.wilde-eng.com

STAFF REPORT
PLANNING COMMISSION – December 15, 2025

APPLICATION TYPE:		CASE:	
Final Plat		FP25-25: Pradon Subdivision, Section One	
SYNOPSIS:			
This is a Final Plat creating two lots over 7.00 acres within the City’s Extra-Territorial Jurisdiction (ETJ), as well as a variance request for paving and curb/gutter along Spillway Road.			
LOCATION:	LEGAL DESCRIPTION(S):		
Generally located at the 8400 block of Spillway Road	Current: Acres: Acres: 7.000, Abst: A-3943 S-0106, Survey: WASHINGTON CO SC, 7.000 ACRES Proposed: Acres: 2.000, Lot 1, Section One, Pradon Subdivision Acres: 5.000, Lot 2, Section One, Pradon Subdivision		
SMD/NEIGHBORHOOD:	ZONING:	FUTURE LAND USE:	SIZE:
District – N/A (ETJ) Neighborhood – N/A (ETJ)	N/A (ETJ)	Rural/Commercial	7.00 acres
THOROUGHFARE PLAN:			
Spillway Road – Major Collector - ROW is currently ~50’, incremental half to 56’ required (additional 3 feet) - Paving is currently ~20, incremental half to 36’ required (additional 8 feet). No curb/gutter. Full variance requested to stay at 20’ with no curbing.			
STAFF RECOMMENDATION:			
Staff recommend APPROVAL of FP25-25: Pradon Subdivision, Section One, subject to three (3) conditions , APPROVAL of a variance for paving on Spillway Road, and DENIAL of a variance for right-of-way on Spillway Road.			
OWNER/PETITIONER:		STAFF CONTACT:	
Owner: Donald Pradon Petitioner: SKG Engineering		Austin Reed Senior Planner (325) 657-4210 Ext. 1550 austin.reed@sanangelo.gov	

Conformity with Comprehensive Plan and Purpose Statements:

This plat is for a large undeveloped tract within the city's Extra-Territorial Jurisdiction (ETJ), about 1000 feet from city limits. It will create one two-acre lot and another five-acre lot. Spillway Road, which both lots front onto, is classified as a Major Collector. However, it is substandard in both right-of-way and paving width, also lacking curb and gutter. As no portion of Spillway meets standards and County officials have expressed their support in granting a variance, requiring improvements to this portion is not necessary. However, staff have deemed the additional right-of-way necessary to allow for future improvements.

Recommendation:

Staff recommend **APPROVAL** of FP25-25: Pradon Subdivision, Section One, subject to **three (3) conditions**, **APPROVAL** of a variance for paving on Spillway Road, and **DENIAL** of a variance for right-of-way on Spillway Road.

- 1) Prior to plat recordation, prepare and submit plans to widen Spillway Road by half the required minimum width for an existing major collector being 36' of paving, meaning an additional 8 feet of width [LDSO, Ch. 10.III.A.2] with curb and gutter. Once plans are approved, construct street widening. Alternatively, submit a financial guarantee ensuring the completion of these improvements within a 36-month period [LDSO, Ch. 6] or receive approval of a variance from the Planning Commission.
- 2) Submit a revised plat on which half the minimum width of 56 feet of right-of-way for Spillway Road, a major collector, is dedicated. [LDSO, Ch.10.III.A.1] Alternatively, receive approval of a variance from the Planning Commission.
- 3) Prior to plat recordation, prepare and submit a sidewalk construction plan for approval illustrating the proposed installation of a sidewalk along Spillway Road, a Major Collector. Alternatively, apply for and receive approval of a sidewalk waiver through the Planning Director and City Engineer. [Subdivision Ordinance, Chapter 9.V & City of San Angelo Standard Specifications and Details for Construction, Detail S-FF-1]

Attachments:

Final Plat

Final Plat



SCALE: 1" = 100'



BEARINGS RECORDED HEREON ARE BASED ON TEXAS COORDINATE SYSTEM OF 1983, CENTRAL ZONE, BY GPS OBSERVATION. DISTANCES SHOWN ARE SURFACE HORIZONTAL.

LEGEND:

- Found 1/2" Iron Pipe or Rod (unless otherwise noted)
- Set 1/2" Iron Rod with Cap

PLANNING COMMISSION
 Approved for recording this ___ day of ___, 20___, City Planning Commission of San Angelo, Texas.

By: _____
 Chairman

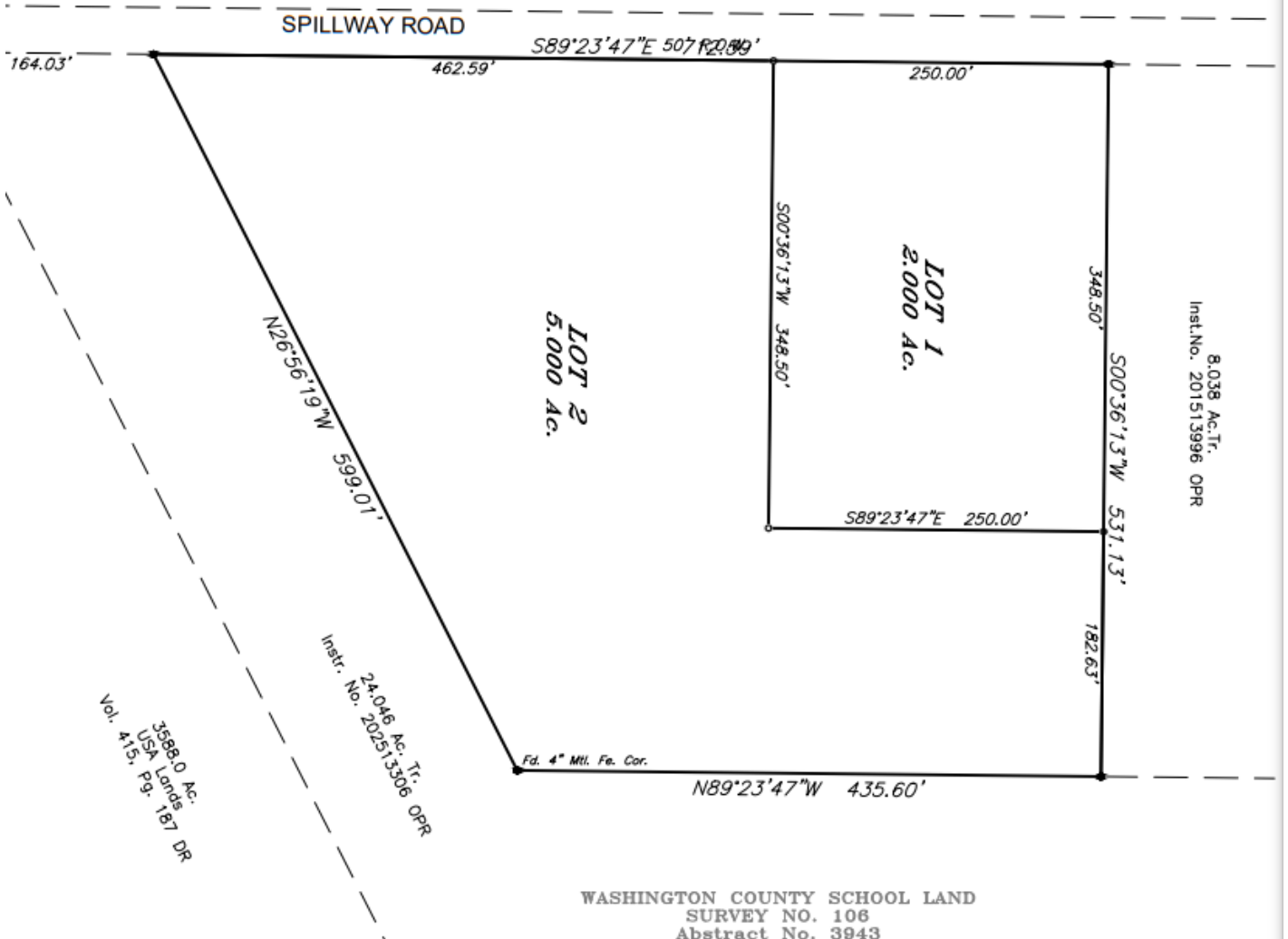
 Secretary

DEPARTMENT OF WATER UTILITIES
 Approved for recording this ___ day of ___, 20___.

By: _____
 Director of Water Utilities

DEPARTMENT OF PUBLIC WORKS
 Approved for recording this ___ day of ___, 20___.

By: _____
 Director of Public Works



8.038 Ac. Tr.
 Instr. No. 201513996 OPR

24.046 Ac. Tr.
 Instr. No. 202513306 OPR

3588.0 Ac.
 USA Lands
 Vol. 415, Pg. 187 DR

STAFF REPORT
PLANNING COMMISSION – December 15, 2025

APPLICATION TYPE:		CASE:	
Final Plat		FP25-26: Southland Hills Addition, Section 29	
SYNOPSIS:			
<p>This is a Final Plat for 25 new residential lots as part of the Southland Hills Addition’s Section 29. These lots will be located along Valleyview Boulevard as it connects between Stone Canyon Trail and College Hills Boulevard. The plat spans 6.106 acres total and includes a variance request to only dedicate 30 feet of right-of-way in lieu of the required incremental half of 35 feet for Valleyview, as well as a variance request for 20’ of paving width on College Hills in lieu of the minimum 26’.</p>			
LOCATION:		LEGAL DESCRIPTION(S):	
South side of Valleyview Boulevard between College Hills and Stone Canyon		Acres: 21.910, Abst: A-0141 S-0180, Survey: C DAMMANN, 21.910 ACRES	
SMD/NEIGHBORHOOD:	ZONING:	FUTURE LAND USE:	SIZE:
District #1 – Tommy Hiebert Neighborhood – Bonham	Planned Development District (PD22-03)	Neighborhood	6.106 acres
THOROUGHFARE PLAN:			
<ul style="list-style-type: none"> - Valleyview Boulevard – Future Major Collector <ul style="list-style-type: none"> - Incremental half of 70’ of R-O-W required, variance requested to only dedicate 30 in lieu of the 35. - Incremental half of 48’ of paving required, which comes up to the minimum 26’. - College Hills Boulevard – Local Road <ul style="list-style-type: none"> - Incremental half of R-O-W (25’) is being dedicated – meets standards. - Incremental half of 40’ of paving required, which comes up to minimum 26’ – variance requested to only build 20’ - Stone Canyon Trail – Local Road <ul style="list-style-type: none"> - Existing, meets standards 			
STAFF RECOMMENDATION:			
<p>Staff recommend APPROVAL of FP25-26: Southland Hills Addition, Section 29, DENIAL of a variance request for right-of-way dedication on Valleyview, and APPROVAL of a variance request for paving width on College Hills, subject to conditions.</p>			
OWNER/PETITIONER:		STAFF CONTACT:	
Owner: Duncan Group Southland, LLC Petitioner: SKG Engineering		Austin Reed Senior Planner (325) 657-4210, Ext. 1550 austin.reed@sanangelo.gov	

Conformity with Comprehensive Plan and Purpose Statements:

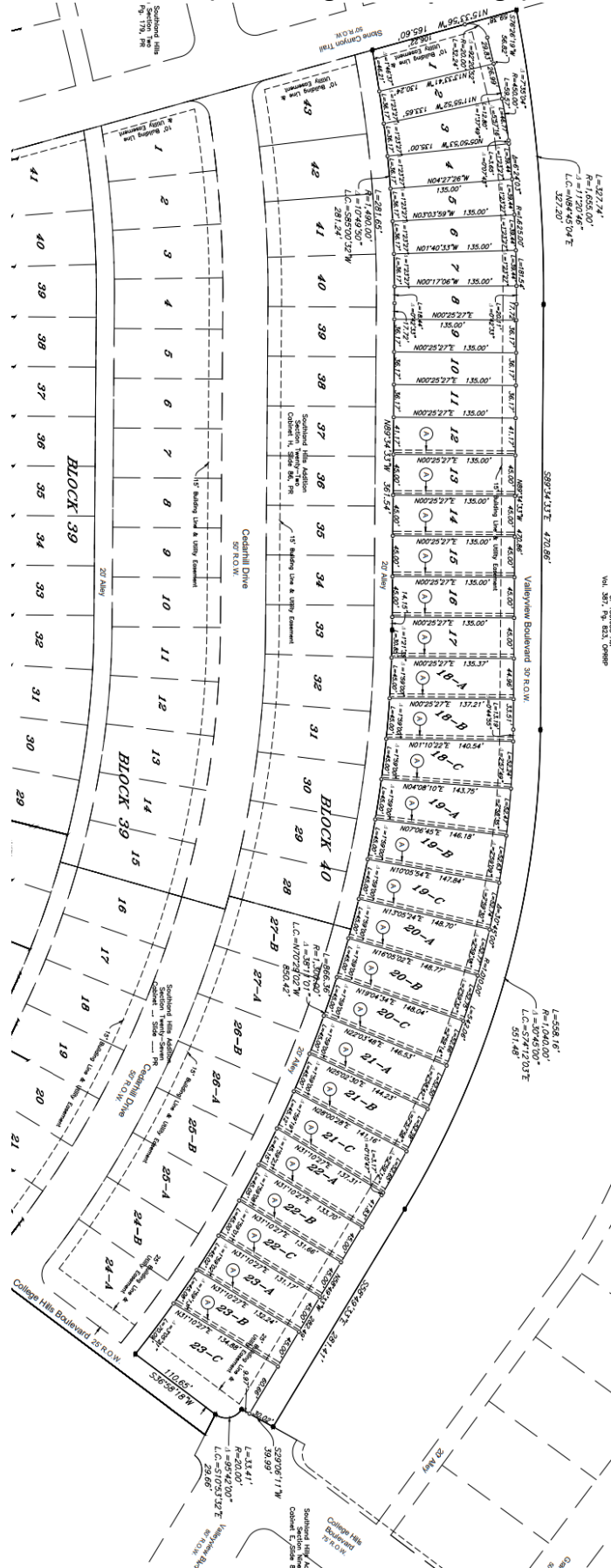
These lots range in width from 36' to 70', and in length from 131' to 148'. The width of these lots lends itself only to townhomes and zero-lot-line homes, both of which are allowed by the Planned Development (PD22-03) zoning district. It appears that lots 1 through 11 will be townhomes and 12 through 23-C will be zero-lot-line. A variance request to only dedicate 30 feet in lieu of 35 feet for the incremental half of Valleyview is not supported by staff as this would only provide for four feet of right-of-way on the south side of the road provided 26 feet of paving goes in. A variance request for 20 feet of paving is supported by staff as requiring 26 feet with only 25 feet of right-of-way is not feasible, and a variance for 20 feet of paving width has already been approved for other segments of College Hills as it continues south. This would allow for 5 feet of right-of-way along the road.

Recommendation:

Staff recommend **APPROVAL** of FP25-26: Southland Hills Addition, Section 29, **DENIAL** of a variance request for right-of-way dedication on Valleyview, and **APPROVAL** of a variance request for paving width on College Hills, subject to **conditions**.

- 1) Prior to plat recordation, prepare and submit plans for the construction of Valleyview, a Major Collector, necessary to comprise at least half of the standard pavement width of 48', but no less than 26'. [LDSO ch.10.III.A.2]. Once plans are approved, construct streets. Alternatively, submit a financial guarantee ensuring the completion of these improvements within a 36-month period [LDSO Ch 6].
- 2) Submit a revised plat on which is illustrated the dedication of 35' of right-of-way for Valleyview Boulevard or receive approval of a variance from the Planning Commission. [Land Development and Subdivision Ordinance, Chapter 10].
- 3) Prior to plat recordation, prepare and submit plans for the construction of College Hills, a local road, necessary to comprise at least half of the standard pavement width of 40', but no less than 26'. [LDSO ch.10.III.A.2]. Once plans are approved, construct streets. Alternatively, submit a financial guarantee ensuring the completion of these improvements within a 36-month period [LDSO Ch 6] or receive approval of a variance from the Planning Commission.
- 4) Prior to plat recordation, prepare and submit plans for approval, illustrating the proposed installation of a water main [Land Development and Subdivision Ordinance ch.10] and complete the installation in accordance with the approved version of these plans [Land Development and Subdivision Ordinance, Chapter 11.I.B]. Alternatively, submit a financial guarantee ensuring the completion of these improvements within a 36-month period [Land Development and Subdivision Ordinance, Chapter 6].
- 5) Prior to plat recordation, provide necessary water and wastewater service lines to each new lot. [Land Development and Subdivision Ordinance, Chapter 11.I.B.2 & Chapter 12.I.A.1] Alternatively, request to the Department of Public Works the deferral of such requirement to a later stage of development. [Land Development and Subdivision Ordinance, Chapter 11.I.B.2]
- 6) Prior to plat recordation, a drainage study shall be submitted [Sec 12.05.001.e.1] and improvements deemed necessary by this study, constructed [LDSO Ch9.IV.A].
- 7) Prior to plat recordation, prepare and submit a sidewalk construction plan for approval illustrating the proposed installation of a sidewalk along Valleyview Boulevard, a Major Collector. Alternatively, apply for and receive approval of a sidewalk waiver through the Planning Director and City Engineer. [Subdivision Ordinance, Chapter 9.V & City of San Angelo Standard Specifications and Details for Construction, Detail S-FF-1]

Final Plat (north = right side of image)



**PLANNING COMMISSION – December 15, 2025
STAFF REPORT**



APPLICATION TYPE:		CASE:	
Replat		RP25-39 Bells Addition Third Replat Blk 20	
SYNOPSIS:			
A request for a third Replat to create four new lots in Block 20 of Bell’s Addition, with a variance request to not construct curb and gutter along Montague Street.			
LOCATION:		LEGAL DESCRIPTION:	
424 Montague		Acres: 1.100, Abst: A-1854 S-0326, Survey: G SCHUBITZ, 1.0180 ACRES	
SM DISTRICT / NEIGHBORHOOD:	ZONING:	FUTURE LAND	SIZE:
District #4 – Patrick Keely PaulAnn Neighborhood	Single-family Residential (RS-1)	Neighborhood	1.018 Acres
THOROUGHFARE PLAN:			
Montague Ave – local road – ROW is 60’ – Variable paving width, ~30ft with no curb or gutter Veck St – local road – ROW is 55’ – Paving Width is 38’			
NOTIFICATIONS:			
N/A			
STAFF RECOMMENDATION:			
Staff recommend <u>APPROVAL</u> of the request to Replat, subject to four (4) Conditions of Approval.			
PROPERTY OWNER/PETITIONER:			
Owner: K&J Construction LLC Petitioner: SKG Engineering			
STAFF CONTACT:			
Arden Neff Planner (325) 657-4210, Ext. 1186 arden.neff@sanangelo.gov			

Conformity with Comprehensive Plan and Purpose Statements:

The applicant intends to replat to create four lots out of one, roughly 55ft x 195ft each, for single-family housing to mirror the existing lots along Montague Ave.

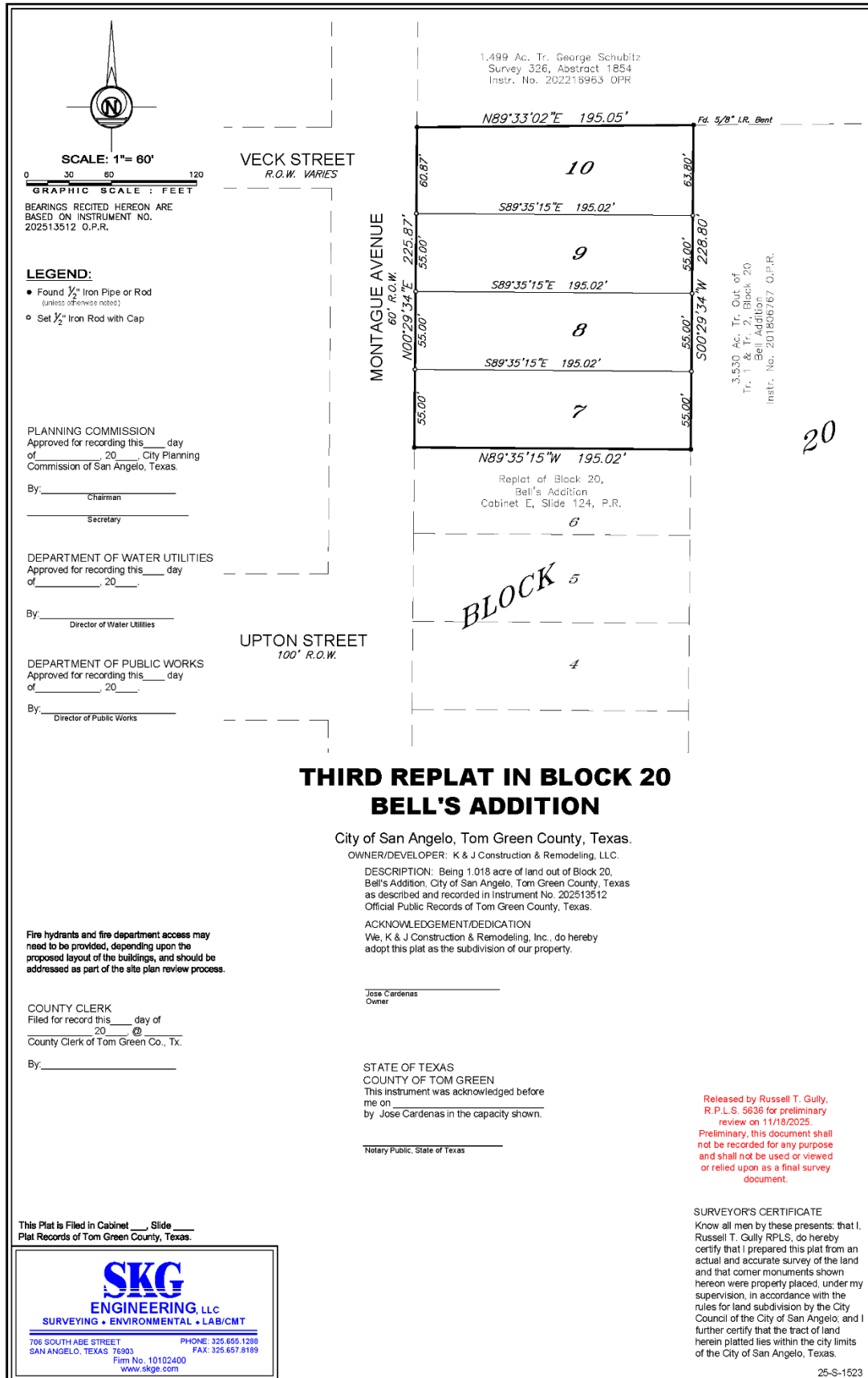
Recommendation:

Staff recommend **APPROVAL** of the request to Replat, subject to **four (4) Conditions of Approval**, and **DENIAL** of a variance request to not construct curb and gutter:

1. Prior to plat recordation, prepare and submit plans for approval, illustrating the proposed installation of a sewer main extension and required service connections for each new lot [Land Development and Subdivision Ordinance, Chapter 12.I.A, City of San Angelo Standards & Specifications]. Then, complete the installation in accordance with the approved version of these plans [Land Development and Subdivision Ordinance, Chapter 12.I.B].
2. Prior to plat recordation, Install necessary water service lines to each new lot [Land Development and Subdivision Ordinance, Chapter 11.I.B.2].
3. Prior to plat recordation, install Curb and Gutter to match the existing alignment on Montague Street then repair the asphalt paving between the newly constructed gutter and existing asphalt to meet COSA design standard [LDSO, CHAP 9, SEC III.5.a.(3)]. Alternatively, either receive approval of variance or a deferral agreement, which must be attached to the plat when provided for signature.
4. Prior to plat recordation, a drainage study shall be submitted [Stormwater Ordinance, Sec 12.05.001; Stormwater Design Manual, Sec 2.13]. If public improvements are deemed necessary by this study, submit construction plan and profile sheets for approval [Stormwater Ordinance, Sec 12.05.001; Stormwater Design Manual, Sec 2.13].

Attachments:

Plat



PLANNING COMMISSION – December 15, 2025
STAFF REPORT

APPLICATION TYPE:		CASE:	
Replat		RP25-40: 2nd Replat in Block 4, Section 2, Old Christoval Road Industrial Park	
SYNOPSIS:			
A request to replat a portion of a lot into two lots over 5.786 acres within the Heavy Commercial (CH) zoning district, as well as a variance request for excessive block length			
LOCATION:		LEGAL DESCRIPTIONS:	
4460 Christoval Road		Acres: 27.888, Blk: 4, Subd: OLD CHRISTOVAL IND PK-C&S, SOUTH PART OF BLOCK 4 SEC 2 BEING 27.888 ACRES	
SM DISTRICT / NEIGHBORHOOD:		ZONING:	FUTURE LAND USE:
District #1 – Tommy Hiebert Neighborhood – Glenmore		Heavy Commercial (CH)	Industrial
			SIZE:
			5.786 acres
THOROUGHFARE PLAN:			
Christoval Road – Minor Arterial – TxDOT owned - ~40' Paving - 100' R-O-W			
STAFF RECOMMENDATION:			
Staff recommend <u>APPROVAL</u> of the replat subject to four (4) conditions , and <u>APPROVAL</u> of the variance request for excessive block length.			
PROPERTY OWNER/PETITIONER:			
Owners: International Evangelism Association Petitioner: SKG Engineering			
STAFF CONTACT:			
Austin Reed Senior Planner (325) 657-4210 ext. 1550 austin.reed@sanangelo.gov			

Conformity with Comprehensive Plan and Purpose Statements:

This is a replat to turn a portion of a larger tract into two new lots – one measuring 2.7 acres and the other measuring 3 acres. There are no buildings or improvements to the property. Christoval Road is controlled by the Texas Department of Transportation, but a variance request for excessive block length is still necessary as the distance along Christoval between E Gas Plant and S Chadbourne without another connecting street is around 6700 feet, where 2200 is the maximum acceptable distance under the Land Development and Subdivision Ordinance. However, there is a preliminary plat encompassing this property which designates an access easement along its southern boundary, and there is also an existing private road abutting to the north. Staff believe that either of these locations may be able to satisfy the required connection in the future. There are existing water mains to the front of the property and no sewer mains within proximity.

Recommendation:

Staff recommend **APPROVAL** of the replat subject to **four (4) conditions**, and **APPROVAL** of the variance request for excessive block length.

1. Prior to plat recordation, install necessary water service lines to each new lot. [Land Development and Subdivision Ordinance, Chapter 11.I.B.2 & Chapter 12.I.A.1]
2. Prior to plat recordation, submit a revised plat on which a new local road connection is dedicated coming east from Christoval Road and continuing through the extent of the plat, and construct the road to local road standards. Alternatively, seek a financial guarantee or receive approval of a variance from the Planning Commission. [LDSO, Ch. 9, Sec. II.B]
3. Prior to plat recordation, prepare and submit plans for approval illustrating the proposed installation of sidewalks along the right-of-way for Christoval Road, and complete the installation in accordance with the approved version of these plans [Land Development and Subdivision Ordinance, Chapter 11.I.B, City of San Angelo Standards and Specifications]. If placement of sidewalks is not feasible within the public right-of-way, easement(s) shall be provided & illustrated on the plat. Alternatively, submit for approval a waiver to the City Engineer and Director of Planning.
4. Prior to plat recordation provide confirmation of Septic Tank Permit and functional operation of independent systems for each lot. Alternatively submit plans for approval, illustrating the proposed extension of sewer main with required service connection. Then, complete the installation in accordance with the approved version of these plans [Land Development and Subdivision Ordinance, Chapter 12].
5. Prior to plat recordation, a drainage study shall be submitted [Sec 12.05.001.e.1] and improvements deemed necessary by this study constructed [LDSO Ch9.IV.A]. If the level of improvement does not necessitate a drainage study, it will be deferred by the City Engineer to a later date.

Attachments:

Replat

Replat



SCALE: 1" = 100'

GRAPHIC SCALE - FEET
 0 50 100 200
 BEARINGS RECITED HEREON ARE
 BASED ON THE PLAT OF RECORD.

LEGEND:

- Found 1/2" Iron Pipe or Rod
 (unless otherwise noted)
- Set 1/2" Iron Rod with Cap

PLANNING COMMISSION
 Approved for recording this ___ day
 of ___, 20___, City Planning
 Commission of San Angelo, Texas.

By: _____
 Chairman

 Secretary

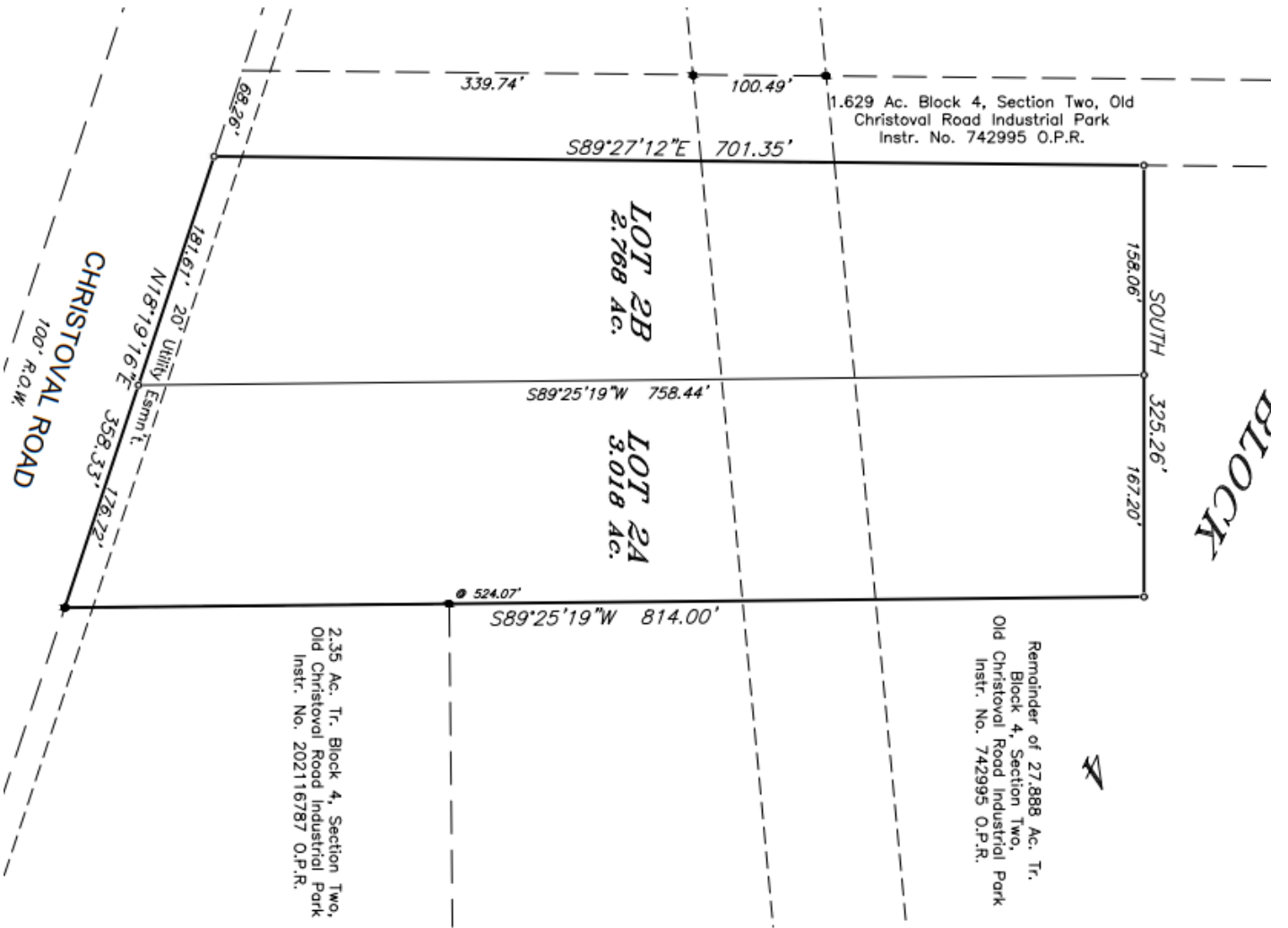
DEPARTMENT OF WATER UTILITIES
 Approved for recording this ___ day
 of ___, 20___

By: _____
 Director of Water Utilities

DEPARTMENT OF PUBLIC WORKS
 Approved for recording this ___ day
 of ___, 20___

By: _____
 Director of Public Works

COUNTY CLERK
 Filed for record this ___ day of
 ___, 20___, @ _____
 County Clerk of Tom Green Co., TX



STAFF REPORT
PLANNING COMMISSION – December 15, 2025
City Council First Reading – January 13, 2026

APPLICATION TYPE:		CASE:	
Zone Change		Z25-25: Northwest Dr & Arden Rd	
SYNOPSIS:			
A request for approval of a zone change from Heavy Commercial (CH) to the Low-Rise Multifamily (RM-1) zoning district for a property located west of the intersection of Northwest Drive and Arden Road.			
LOCATION:		LEGAL DESCRIPTION(S):	
West of the intersection of Northwest Drive and Arden Road		Acres: 21.257, Lot: 1, Blk: 3, Subd: ARDEN ACRES, SEC 3 2ND R/P IN BLK 3 SEC 3	
SM DISTRICT:	ZONING:	FUTURE LAND USE:	SIZE:
SMD #6 – Mary Coffee Neighborhood – Bluffs	Current: CH Proposed: RM-1	Commercial	21.257 acres
THOROUGHFARE PLAN:			
Arden Road – Major Arterial Northwest Drive – Minor Collector			
NOTIFICATIONS:			
14 notices were mailed. At the time of this report, no notices have been returned.			
STAFF RECOMMENDATION:			
Staff recommend <u>APPROVAL</u> of the zone change from Heavy Commercial (CH) to Low-Rise Multifamily (RM-1)			
PROPERTY OWNER/PETITIONER:			
Owner: Tigris Development, LLC			
STAFF CONTACT:			
Austin Reed Senior Planner (325) 657-4210, Ext. 1550 austin.reed@sanangelo.gov			

Information:

This zone change encompasses one 21-acre property along Arden Road that is currently undeveloped but is looking to be developed for multifamily residential. The Vision Plan is Commercial, which is compatible with multifamily zoning. This property received approval of a Conditional Use to allow multifamily earlier this year. As part of that Conditional Use, the applicant was required to receive approval of a full zone change within 12 months.

Planning Commission evaluation of appropriateness.

Section 213(G) of the Zoning Ordinance requires that the Planning Commission and City Council consider, at minimum, seven (7) factors in determining the appropriateness of any rezoning request as outlined in #1 through #7 below:

1. **Compatible with Plans and Policies.** **Whether the proposed amendment is compatible with the Comprehensive Plan and any other land use policies adopted by the Planning Commission or City Council.**
The future land use envisioned for this property is “Commercial”, which is compatible with multifamily zoning.
2. **Consistent with Zoning Ordinance.** **Whether and the extent to which the proposed amendment would conflict with any portion of this Zoning Ordinance.**
This request would not conflict with the Zoning Ordinance in any way would be consistent with RM-1 standards.
3. **Compatible with Surrounding Area.** **Whether and the extent to which the proposed amendment is compatible with existing and proposed uses surrounding the subject land and is the appropriate zoning district for the land.**
The proposed multifamily zoning would be compatible with the surrounding area as the subject property is located along a major thoroughfare and there is another multifamily development to the south. While there are remaining pieces of Heavy Commercial zoning nearby, it has never been developed. There are nearby amenities such as sports fields and commercial businesses, and TLCA is located not far to the south.
4. **Changed Conditions.** **Whether and the extent to which there are changed conditions that require an amendment.**
A zone change to Low-Rise Multifamily Residential is necessary for the applicant’s plans to develop the property for residential use.
5. **Effect on Natural Environment.** **Whether and the extent to which the proposed amendment would result in significant adverse impacts on the natural environment, including but not limited to water and air quality, noise, storm water management, wildlife, vegetation, wetlands and the practical functioning of the natural environment.**
Staff do not anticipate any adverse effects on the nearby natural environment.
6. **Community Need.** **Whether and the extent to which the proposed amendment addresses a demonstrated community need.**
RM-1 zoning at this location may help to meet a demonstrated community need for available housing.
7. **Development Patterns.** **Whether and the extent to which the proposed amendment would result in a logical and orderly pattern of urban development in the community.**
RM-1 zoning at this location would result in a logical and orderly pattern of development where multifamily lies alongside commercial properties on a major thoroughfare.

Recommendation:

Staff recommend **APPROVAL** of the zone change from Heavy Commercial (CH) to Low-Rise Multifamily (RM-1)

Attachments:

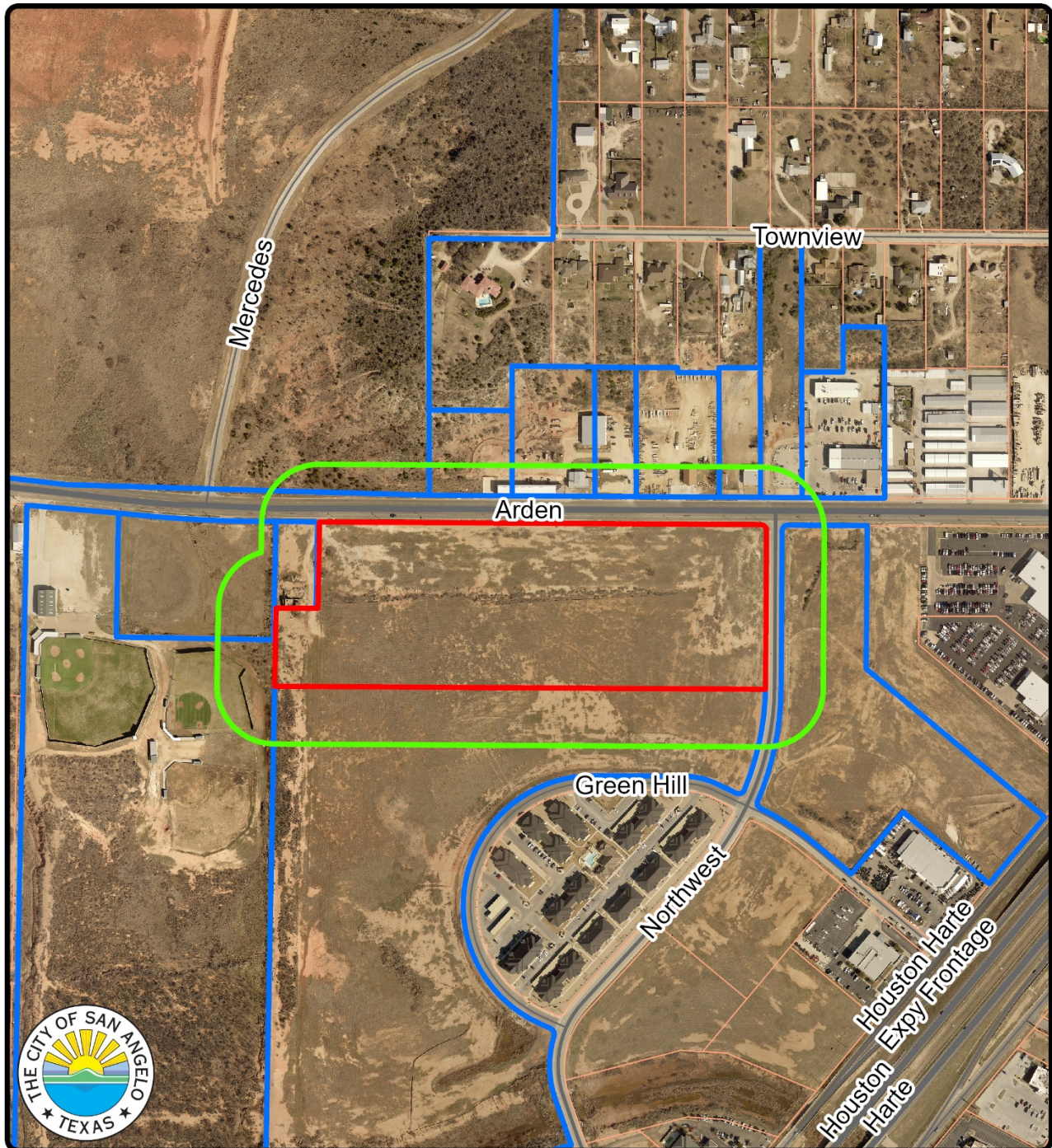
Notification Map

Aerial Map

Zoning Map




Vision Map


Notification Map



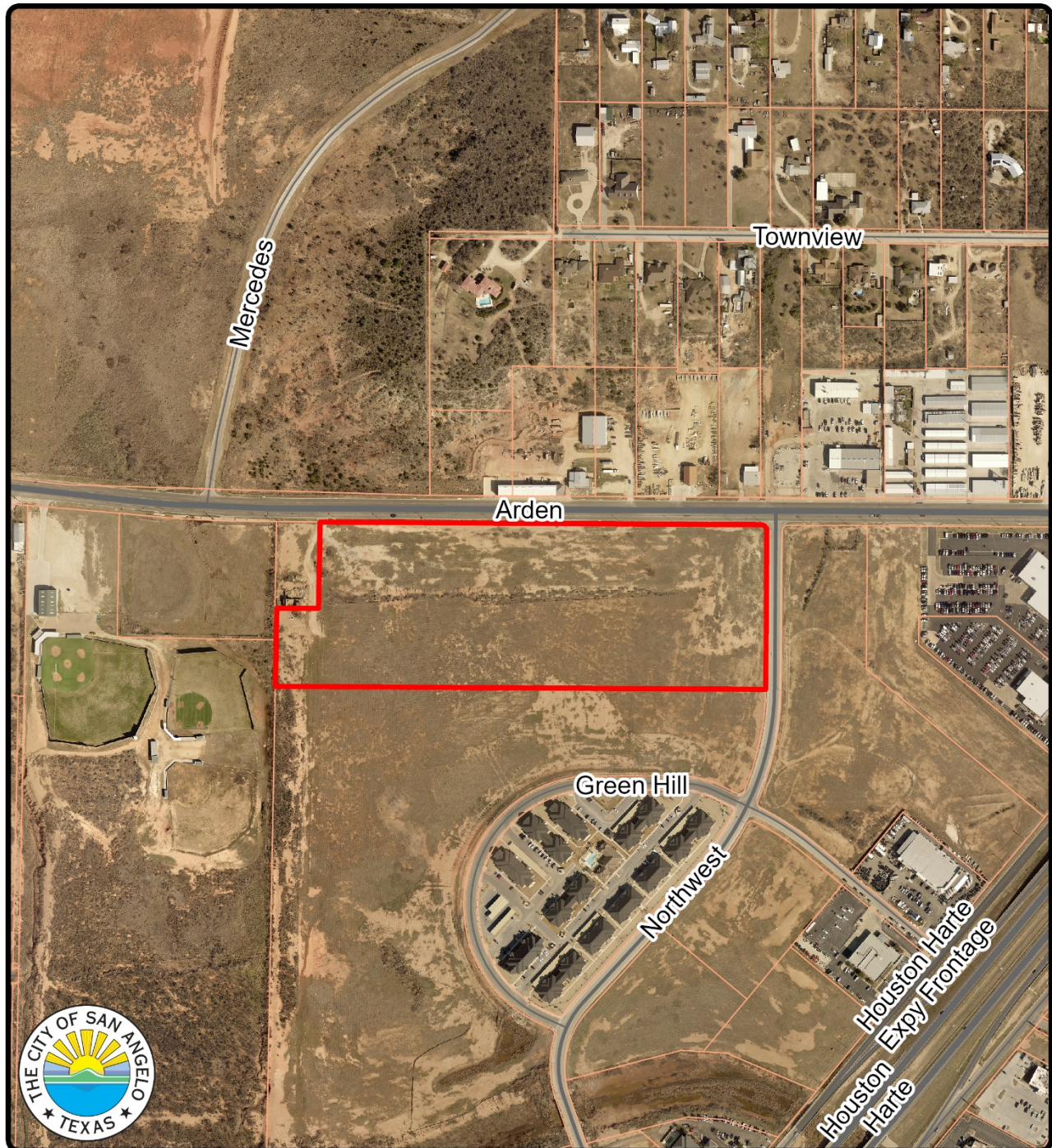
Notification Map
Z25-25: Northwest & Arden
Council District: #6 - Mary Coffey
Neighborhood: Bluffs

Scale: 0 0.03 0.06 0.12 0.18 0.24 Miles

200' Range: 
Subject Property: 
Notified Properties: 

N



Aerial Map



Aerial Map
Z25-25: Northwest & Arden

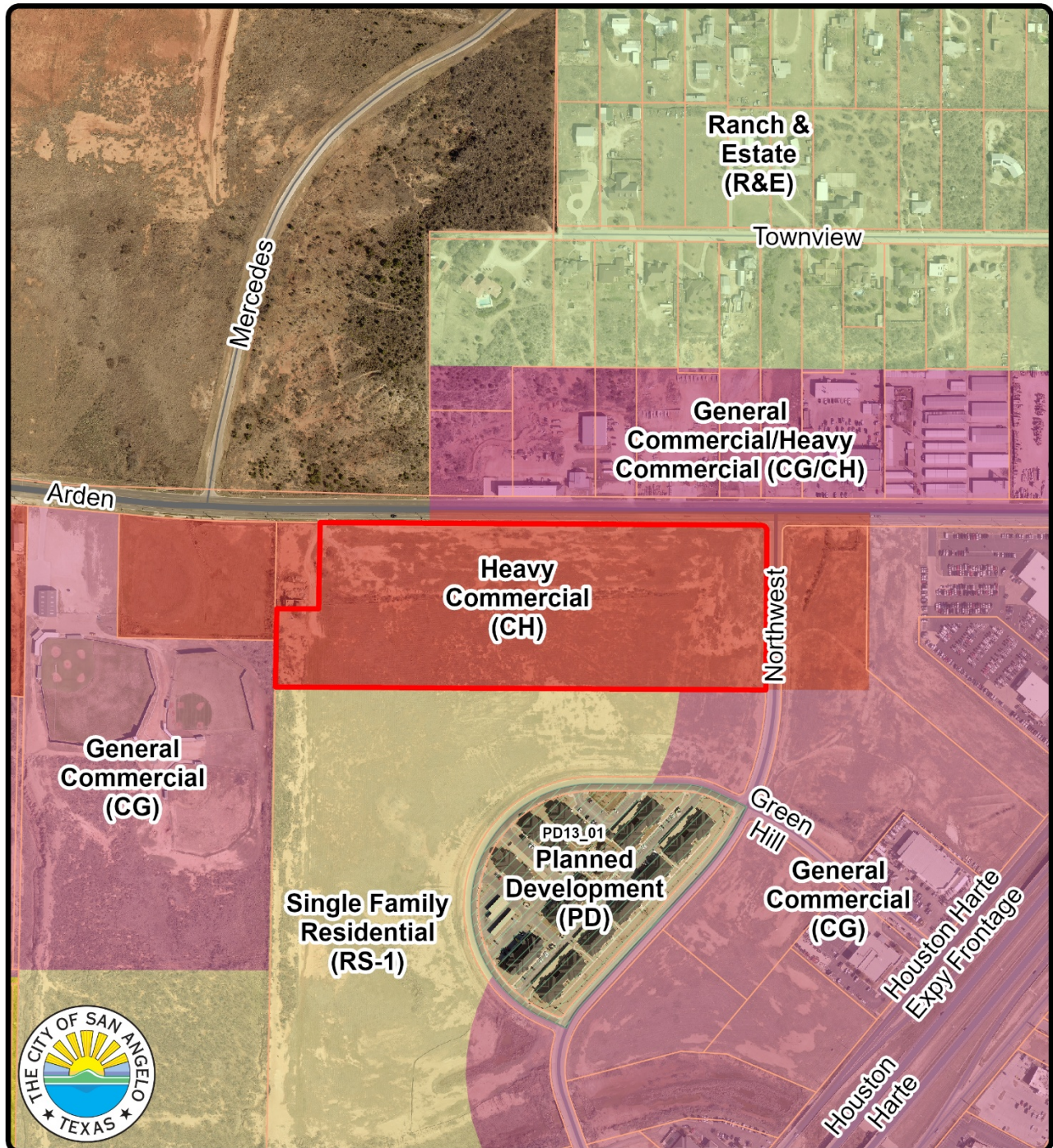
Council District: #6 - Mary Coffey
Neighborhood: Bluffs

Scale: 0 0.03 0.06 0.12 0.18 0.24 Miles

Subject Property: 




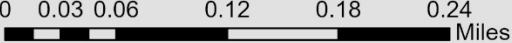
Zoning Map



Zoning Map
Z25-25: Northwest & Arden

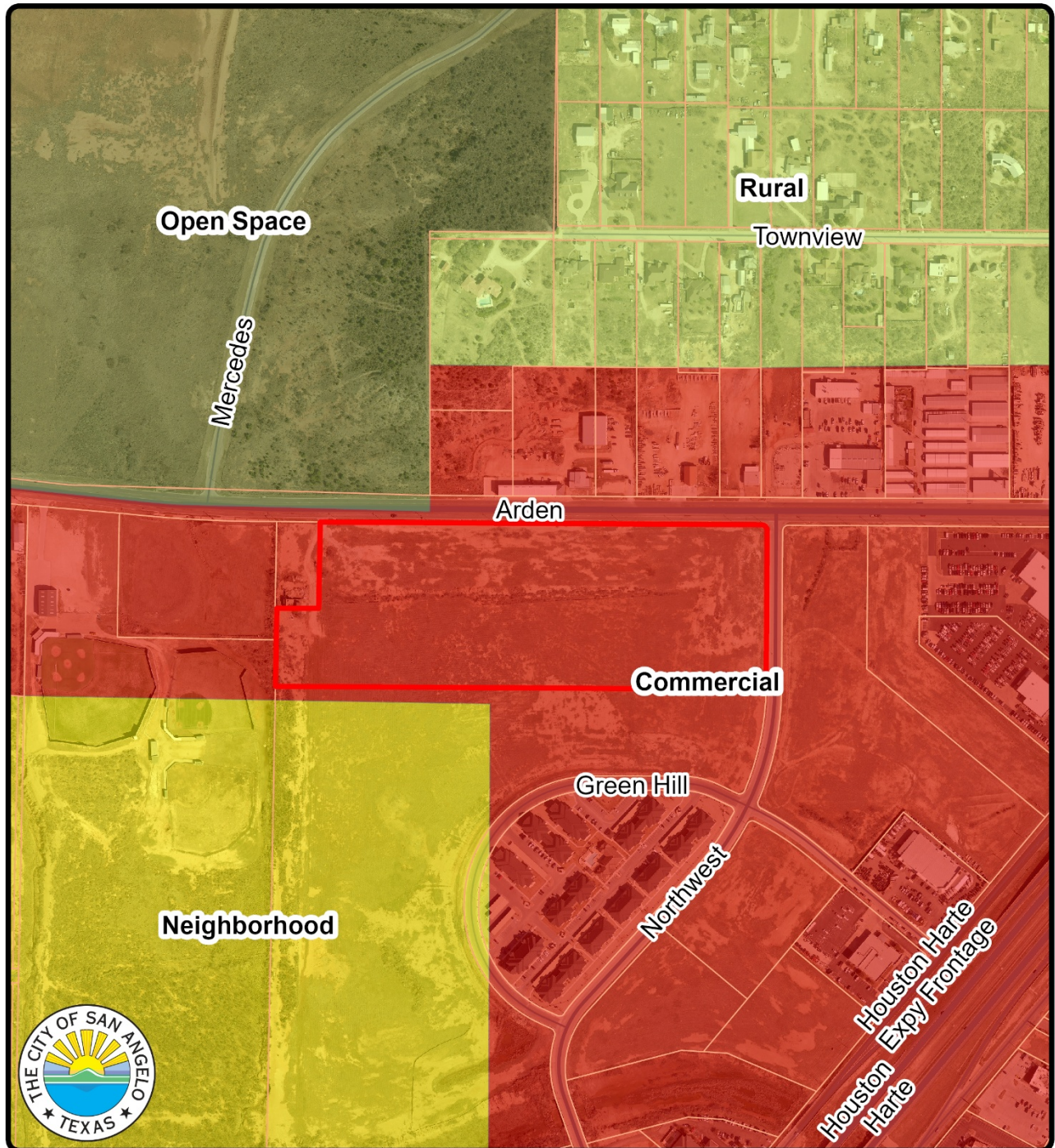
Council District: #6 - Mary Coffey
Neighborhood: Bluffs

Subject Property: 

Scale:  Miles



Vision Plan



Vision Map
Z25-25: Northwest & Arden

Council District: #6 - Mary Coffey
Neighborhood: Bluffs

Scale: 0 0.03 0.06 0.12 0.18 0.24 Miles

Subject Property: 



STAFF REPORT
PLANNING COMMISSION – December 15, 2025
City Council First Reading – January 13, 2026

APPLICATION TYPE:		CASE:	
Zone Change		Z25-26: 2719 Waco	
SYNOPSIS:			
A request for approval of a zone change from Single-Family Residential (RS-1) to Two-Family Residential (RS-2) for the property located at 2719 Waco.			
LOCATION:		LEGAL DESCRIPTION(S):	
2719 Waco		Acres: 0.161, Lot: 5, Blk: 64, Subd: HATCHER ADDITION	
SM DISTRICT:	ZONING:	FUTURE LAND USE:	SIZE:
SMD #2 – Joe Self Neighborhood – Bluffs	Current: RS-1 Proposed: RS-2	Neighborhood	0.161 acres
THOROUGHFARE PLAN:			
Waco St – Local Road			
NOTIFICATIONS:			
24 notices were mailed 11/25/2025. At the time of this report, 1 notice was returned in favor and 1 was returned in opposition.			
STAFF RECOMMENDATION:			
Staff recommend APPROVAL of the zone change from Single-Family Residential (RS-1) to Two-Family Residential (RS-2).			
PROPERTY OWNER/PETITIONER:			
Owner: Robert Gonzales			
STAFF CONTACT:			
Arden Neff Planner (325) 657-4210, Ext. 1186 arden.neff@sanangelo.gov			

Information:

Applicant has requested a zone change to Two-Family Residential at a 50 x 140ft lot located at 2719 Waco. The area is in the most recently added Infill block, and is predominantly Single-Family with a few small pockets of Neighborhood Commercial and RS-2. This proposed zone change aligns with current neighborhood vision plans, will preserve the single-family character of the area, and services a demonstrated community need for unique/alternative housing via the COSADC housing study.

Planning Commission evaluation of appropriateness.

Section 213(G) of the Zoning Ordinance requires that the Planning Commission and City Council consider, at minimum, seven (7) factors in determining the appropriateness of any rezoning request as outlined in #1 through #7 below:

1. **Compatible with Plans and Policies. Whether the proposed amendment is compatible with the Comprehensive Plan and any other land use policies adopted by the Planning Commission or City Council.**
The vision plan for this area is Neighborhood, and the lot falls within the Infill area. Staff notes that this request remains compatible with the future Neighborhood land use and aligns with the intent of the Infill area to incentivize residential development in select areas of the city.
2. **Consistent with Zoning Ordinance. Whether and the extent to which the proposed amendment would conflict with any portion of this Zoning Ordinance.**
This zone change would not conflict with any portion of the Zoning Ordinance. This is a rezone from one medium-density residential district to another in an area with Neighborhood land use, and the lot size meets the minimum 6,500 sqft standard for two-family units in RS-2.
3. **Compatible with Surrounding Area. Whether and the extent to which the proposed amendment is compatible with existing and proposed uses surrounding the subject land and is the appropriate zoning district for the land.**
While this area is predominantly RS-1, the intent of the applicant is to maintain a single-family façade by placing an accessory dwelling unit to the back of the lot in accordance with section 401 of Zoning Ordinance. The proposed amendment will not alter the function nor the visual character of the neighborhood; RS-2 is the appropriate zoning district to utilize these larger lots to provide additional affordable housing in the interim of the City's efforts to reform zoning ordinance. While paved access will be required to the back residence, the permitting process will ensure that the character of the abutting Waco street is preserved.
4. **Changed Conditions. Whether and the extent to which there are changed conditions that require an amendment.**
This residence falls within the newest addition to the City's Infill area. These areas are chosen according to census tracts for low-to-moderate income; despite the entire area having longer lots, the average square footage of homes along this block face remains nearly half the size of new affordable housing via the US Census Bureau. This area's recent designation as infill communicates a need for innovative solutions to underutilized space.
5. **Effect on Natural Environment. Whether and the extent to which the proposed amendment would result in significant adverse impacts on the natural environment, including but not limited to water and air quality, noise, storm water management, wildlife, vegetation, wetlands and the practical functioning of the natural environment.**

Staff does not anticipate any adverse environmental effects. Any necessary alterations to environment and infrastructure are mitigated via Zoning standards such as unit size, façade, parking, and utilities.

6. Community Need. Whether and the extent to which the proposed amendment addresses a demonstrated community need.

The recently-released 2019 residential housing study demonstrates significant community need for innovative housing solutions in the City of San Angelo. The 116 page document includes several city-specific recommendations for which are reflected in the proposed amendment, including the promotion of ‘backyard cottages’, reduced lot sizes, and by-right construction of ‘middle housing types’. The executive summary states that the “greatest demand, as well as lack of supply, in the San Angelo housing market is entry level first time buyer homes in the \$175k - \$225k price range and rental units from \$875 - \$1300 a month” (10).

7. Development Patterns. Whether and the extent to which the proposed amendment would result in a logical and orderly pattern of urban development in the community.

The RS-2 zoning district is created to mirror the density of RS-1 areas while provide slightly more flexibility to homeowners. This amendment would continue the developmental pattern of the area, preserve its residential character and pace of life, and meet the growing pattern of backfill housing development in the City of San Angelo.

Recommendation:

Staff recommend **APPROVAL** of the zone change from Single-Family Residential (RS-1) to Two-Family Residential (RS-2) at 2719 Waco.

Attachments:

Notification Map
Zoning Map
Vision Map
Residential District Committee Intent Statement



Zoning Map
Z25-26: 2719 Waco

Council District: #2 - Joe Self
Neighborhood: Bluffs

Subject Property: 

Scale:  Miles



STAFF REPORT
PLANNING COMMISSION – December 15, 2025
City Council First Reading – January 13, 2026

APPLICATION TYPE:		CASE:	
Zone Change		Z25-27: Avenue K & Duggan St	
SYNOPSIS:			
A request for approval of a zone change from General/Heavy Commercial (CG/CH) to a Low-Rise Multifamily Residential (RM-1) located west of the intersection of E Ave K & Duggan St.			
LOCATION:		LEGAL DESCRIPTION(S):	
West of the intersection of E Avenue K & Duggan St		Acres: 0.195, Lot: 7, Blk: 99, Subd: FORT CONCHO ADDITION Acres: 0.195, Lot: 8, Blk: 99, Subd: FORT CONCHO ADDITION Acres: 0.195, Lot: 9, Blk: 99, Subd: FORT CONCHO ADDITION	
SM DISTRICT:	ZONING:	FUTURE LAND USE:	SIZE:
SMD #3 – Harry Thomas Neighborhood – Ft Concho	Current: CG/CH Proposed: RM-1	Industrial and Neighborhood Center	0.585 total acres
THOROUGHFARE PLAN:			
E Avenue K – Local road Duggan St – Local road			
NOTIFICATIONS:			
25 notices were mailed. At the time of this report, no notices have been returned.			
STAFF RECOMMENDATION:			
Staff recommend <u>APPROVAL</u> of the zone change from General/Heavy Commercial (CG/CH) to Low-Rise Multifamily (RM-1)			
PROPERTY OWNER/PETITIONER:			
Owner Representative: Wilde Engineering and Surveying, LLC			
STAFF CONTACT:			
Rae Lineberry Lead Planner (325) 657-4210, Ext. 1533 rae.lineberry@sanangelo.gov			

Information:

This zone change encompasses 3 lots that are currently undeveloped. The owner is replatting the lots into one to be developed for multifamily residential. There is residential to the north, east, and west. The lot catcorner previously received a zone change and comprehensive plan amendment this year for low-rise multifamily residential zoning and commercial on the vision plan. The lot to the south previously received a conditional use for residential living.

Planning Commission evaluation of appropriateness.

Section 213(G) of the Zoning Ordinance requires that the Planning Commission and City Council consider, at minimum, seven (7) factors in determining the appropriateness of any rezoning request as outlined in #1 through #7 below:

1. **Compatible with Plans and Policies.** **Whether the proposed amendment is compatible with the Comprehensive Plan and any other land use policies adopted by the Planning Commission or City Council.**
The future land use envisioned for this property is Neighborhood Center and Industrial. Neighborhood Center is compatible with multifamily zoning but Industrial will need a comprehensive plan amendment.
2. **Consistent with Zoning Ordinance.** **Whether and the extent to which the proposed amendment would conflict with any portion of this Zoning Ordinance.**
This request does not conflict with the Zoning Ordinance as this area has become residential in the area.
3. **Compatible with Surrounding Area.** **Whether and the extent to which the proposed amendment is compatible with existing and proposed uses surrounding the subject land and is the appropriate zoning district for the land.**
The proposed multifamily zoning would be compatible with the surrounding area as the subject property is located among single-family residential and another multifamily development to the southeast. There are some Commercial properties nearby, along S Oakes St and E Avenue K and Duggan and E Avenue L. This allows for nearby amenities such as Dollar General.
4. **Changed Conditions.** **Whether and the extent to which there are changed conditions that require an amendment.**
A zone change to Low-Rise Multifamily Residential is necessary for the applicant's plans to develop the property for residential use.
5. **Effect on Natural Environment.** **Whether and the extent to which the proposed amendment would result in significant adverse impacts on the natural environment, including but not limited to water and air quality, noise, storm water management, wildlife, vegetation, wetlands and the practical functioning of the natural environment.**
Staff do not anticipate any adverse effects on the nearby natural environment.
6. **Community Need.** **Whether and the extent to which the proposed amendment addresses a demonstrated community need.**
RM-1 zoning at this location may help to meet a demonstrated community need for available housing and offers a buffer between the commercial properties and the single-family residential.
7. **Development Patterns.** **Whether and the extent to which the proposed amendment would result in a logical and orderly pattern of urban development in the community.**
RM-1 zoning at this location would result in a logical and orderly pattern of development where multifamily acts as a buffer between commercial and single-family residential.

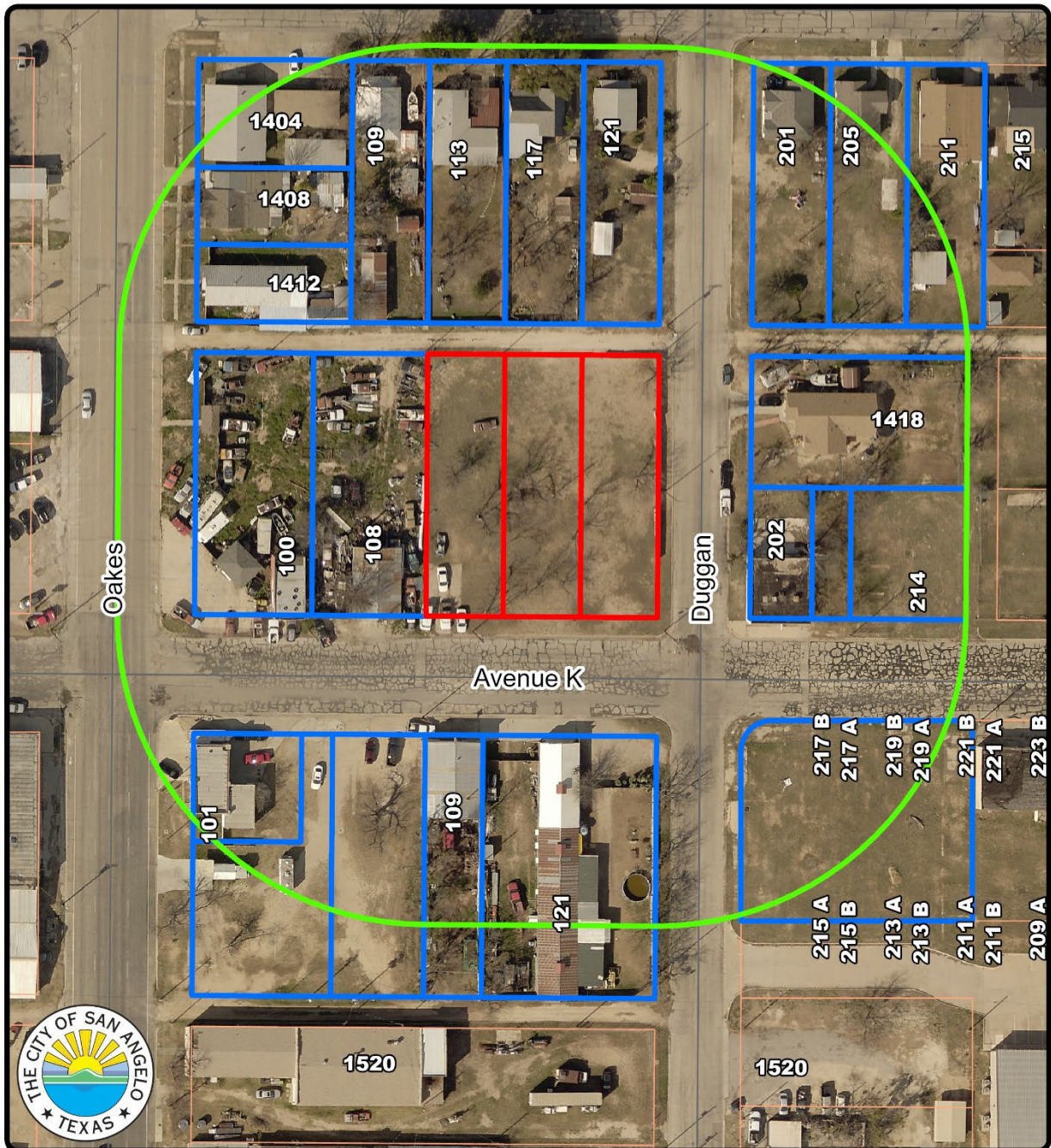
Recommendation:

Staff recommend **APPROVAL** of the zone change from General/Heavy Commercial (CG/CH) to Low-Rise Multifamily (RM-1)

Attachments:

Notification Map
Aerial Map
Zoning Map
Vision Map


Notification Map



Notification Map
Z25-27: Avenue K & Duggan

Council District: #3 - Harry Thomas
Neighborhood: Ft. Concho

Scale: 0 0.01 0.01 0.02 0.03 0.04 Miles

200' Range: 

Subject Property: 

Notified Properties: 



Aerial Map



Aerial Map
Z25-27: Avenue K & Duggan

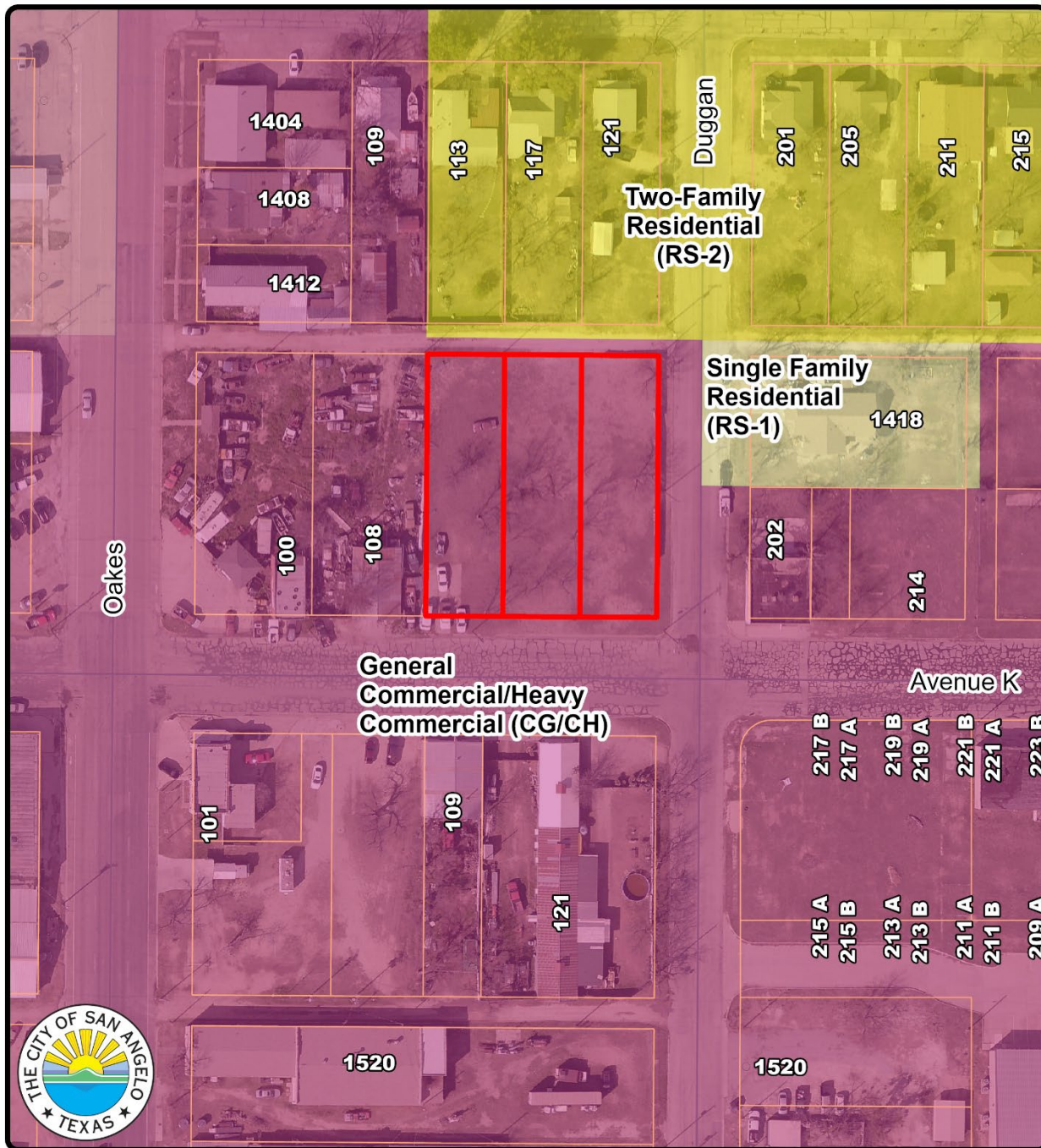
Council District: #3 - Harry Thomas
Neighborhood: Ft. Concho

Subject Property: 

Scale:  Miles





Zoning Map



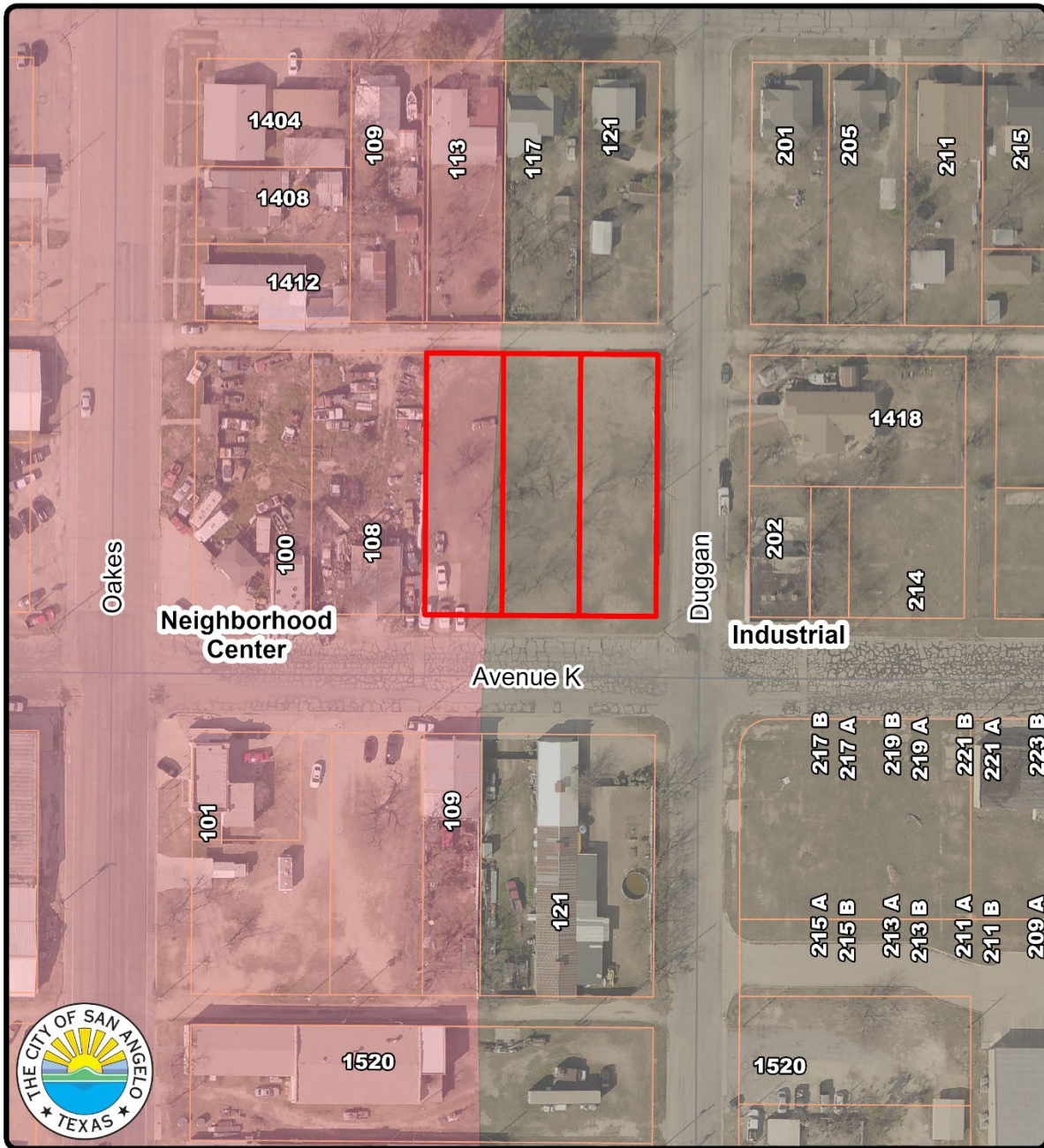
Zoning Map
Z25-27: Avenue K & Duggan
Council District: #3 - Harry Thomas
Neighborhood: Ft. Concho

Scale: 0 0.01 0.01 0.02 0.03 0.04 Miles

Subject Property: 



Vision Plan



Vision Map
Z25-27: Avenue K & Duggan

Council District: #3 - Harry Thomas
Neighborhood: Ft. Concho

Scale: 0 0.01 0.02 0.03 0.04 Miles

Subject Property: 



STAFF REPORT
PLANNING COMMISSION – December 15, 2025
City Council First Reading – January 13, 2025

APPLICATION TYPE:		CASE:	
Zone Change		Z25-28: 3110, 3114, 3118, and 3122 Waco St. and Acres: 0.026, Blk: 68, Subd: HATCHER ADDITION, N PART OF LOTS 3 & 4	
SYNOPSIS:			
A request for approval of a zone change from Single-Family Residential (RS-1) to Neighborhood Commercial (CN) located at 3110, 3114, 3118, and 3122 Waco St. and Acres: 0.026, Blk: 68, Subd: HATCHER ADDITION, N PART OF LOTS 3 & 4.			
LOCATION:		LEGAL DESCRIPTION(S):	
3110, 3114, 3118, and 3122 Waco St. and Acres: 0.026, Blk: 68, Subd: HATCHER ADDITION, N PART OF LOTS 3 & 4		Hatcher Addition Block 55 lots 11-14 and Hatcher Addition Block 68 Northern part of Lots 3 and 4	
SM DISTRICT:	ZONING:	FUTURE LAND USE:	SIZE:
SMD #2 – Joe Self Neighborhood – The Bluffs	Current: RS-1 Proposed: CN	Neighborhood Central	0.57 acres
THOROUGHFARE PLAN:			
Local Street – Waco St is unbuilt adjacent to these lots – future proposal to abandon and replat. W Houston Harte Expy. Frontage Rd – TXDOT and built to standard for frontage road.			
NOTIFICATIONS:			
21 notices were mailed. At the time of this report, no notices have been returned.			
STAFF RECOMMENDATION:			
Staff recommend APPROVAL of the zone change from Single-Family Residential (RS-1) to Neighborhood Commercial (CN).			
PROPERTY OWNER/PETITIONER:			
Owner: Phyllis Walcott			
STAFF CONTACT:			
Aaron Vannoy Planning and Development Services Director (325) 657-4210, Ext. 1542 Aaron.vannoy@sanangelo.gov			

December 15, 2025

Information:

This zone change will connect commercially zone areas with a low intensity use of Neighborhood Commercial. This zone allows for smaller buildings and lower traffic flows. Land use could be a limited range of retail trade and services, small incremental development.

Planning Commission evaluation of appropriateness.

Section 213(G) of the Zoning Ordinance requires that the Planning Commission and City Council consider, at minimum, seven (7) factors in determining the appropriateness of any rezoning request as outlined in #1 through #7 below:

1. **Compatible with Plans and Policies.** Whether the proposed amendment is compatible with the Comprehensive Plan and any other land use policies adopted by the Planning Commission or City Council.
The future land use for this property is "Neighborhood Center" which aligns with a low intensity Neighborhood Commercial zoning district. The proposed land use may be a small-scale carpet store which historically has a low traffic volume even if the building structure is slightly larger.
2. **Consistent with Zoning Ordinance.** Whether and the extent to which the proposed amendment would conflict with any portion of this Zoning Ordinance.
This request does not conflict with the Zoning Ordinance. The existing use fits under Neighborhood Commercial zoning. Compare a carpet store to a convenience store, which typically falls within CN zoning district, the traffic volume is much lower; the heavy vehicle trips are fewer, and this does serve the neighborhood are with direct access to Houston Harte.
3. **Compatible with Surrounding Area.** Whether and the extent to which the proposed amendment is compatible with existing and proposed uses surrounding the subject land and is the appropriate zoning district for the land.
The proposed zoning would be compatible with the surrounding area. This has slowly turned more commercial and with low-rise multifamily units close by. Both indicate the land use is compatible with mixed use which will match the Comprehensive Plan.
4. **Changed Conditions.** Whether and the extent to which there are changed conditions that require an amendment.
A zone change to is to provide additional low intensity commercial along a major throughfare area. The connecting of low intensity commercial in the area matches previous zone changes along the frontage which allows a mixed use of commercial and multifamily residential.
5. **Effect on Natural Environment.** Whether and the extent to which the proposed amendment would result in significant adverse impacts on the natural environment, including but not limited to water and air quality, noise, storm water management, wildlife, vegetation, wetlands and the practical functioning of the natural environment.
While the land has not been developed in many years there is not anticipation the natural environment will be changed significantly as the project is less that a ½ acre in size.
6. **Community Need.** Whether and the extent to which the proposed amendment addresses a demonstrated community need.
Neighborhood Commercial zoning at this location may help the community need to allow additional

December 15, 2025

commercial properties to develop and help stabilize property values in the area.

7. **Development Patterns.** *Whether and the extent to which the proposed amendment would result in a logical and orderly pattern of urban development in the community.*

Neighborhood Commercial is a good transition zoning between low intensity commercial and residential uses. This location, the zone change would not disrupt any existing patterns of development within the community.

Recommendation:

Staff recommend **APPROVAL** of the zone change from Single-Family Residential (RS-1) to Neighborhood Commercial (NC).

Attachments:

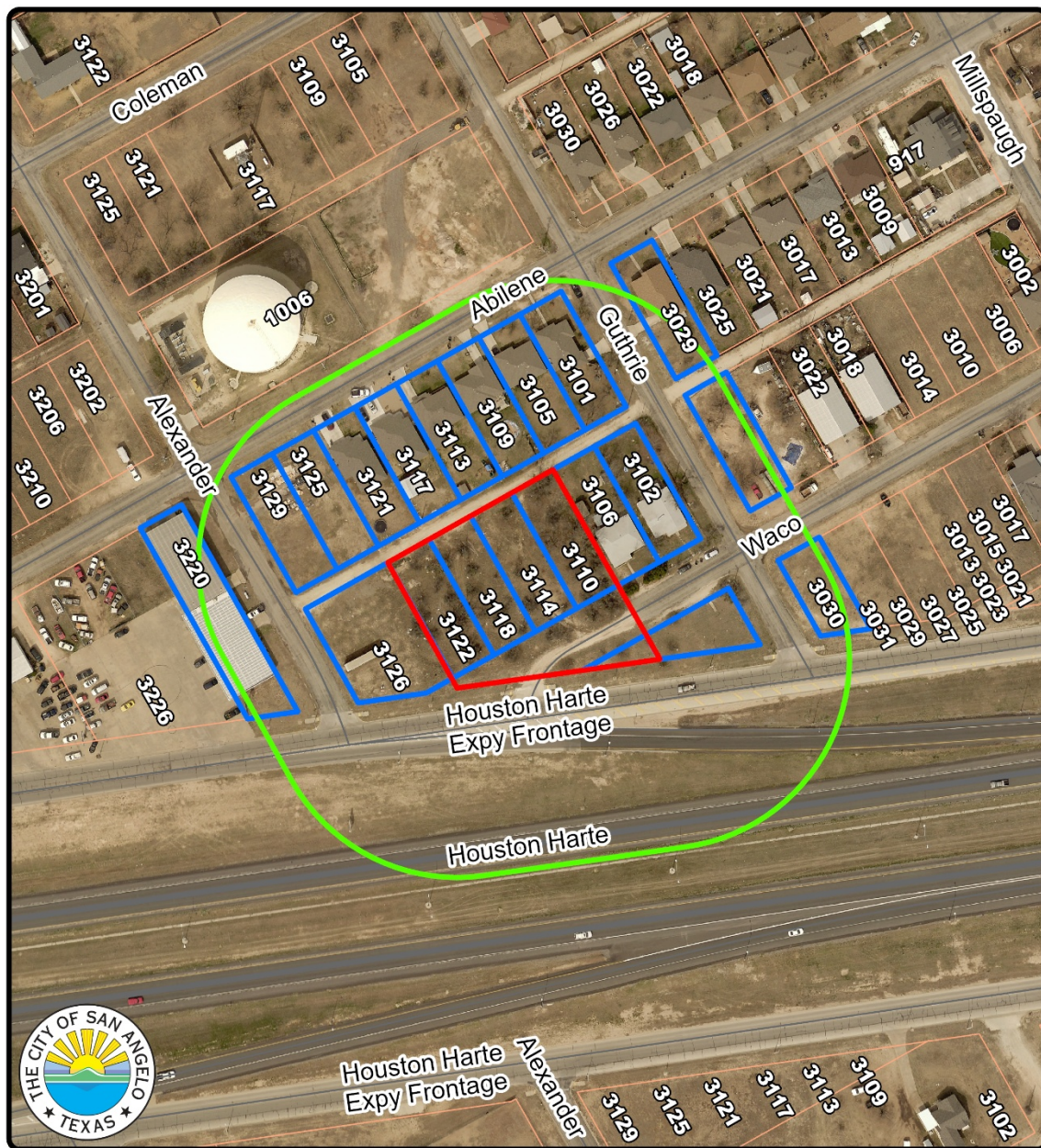
Notification Map

Zoning Map

Vision Map

December 15, 2025

Notification Map



Notification Map
ZBA25-28: 3110, 3114, 3118, 3122 Waco
Council District: #2 - Joe Self
Neighborhood: Bluffs

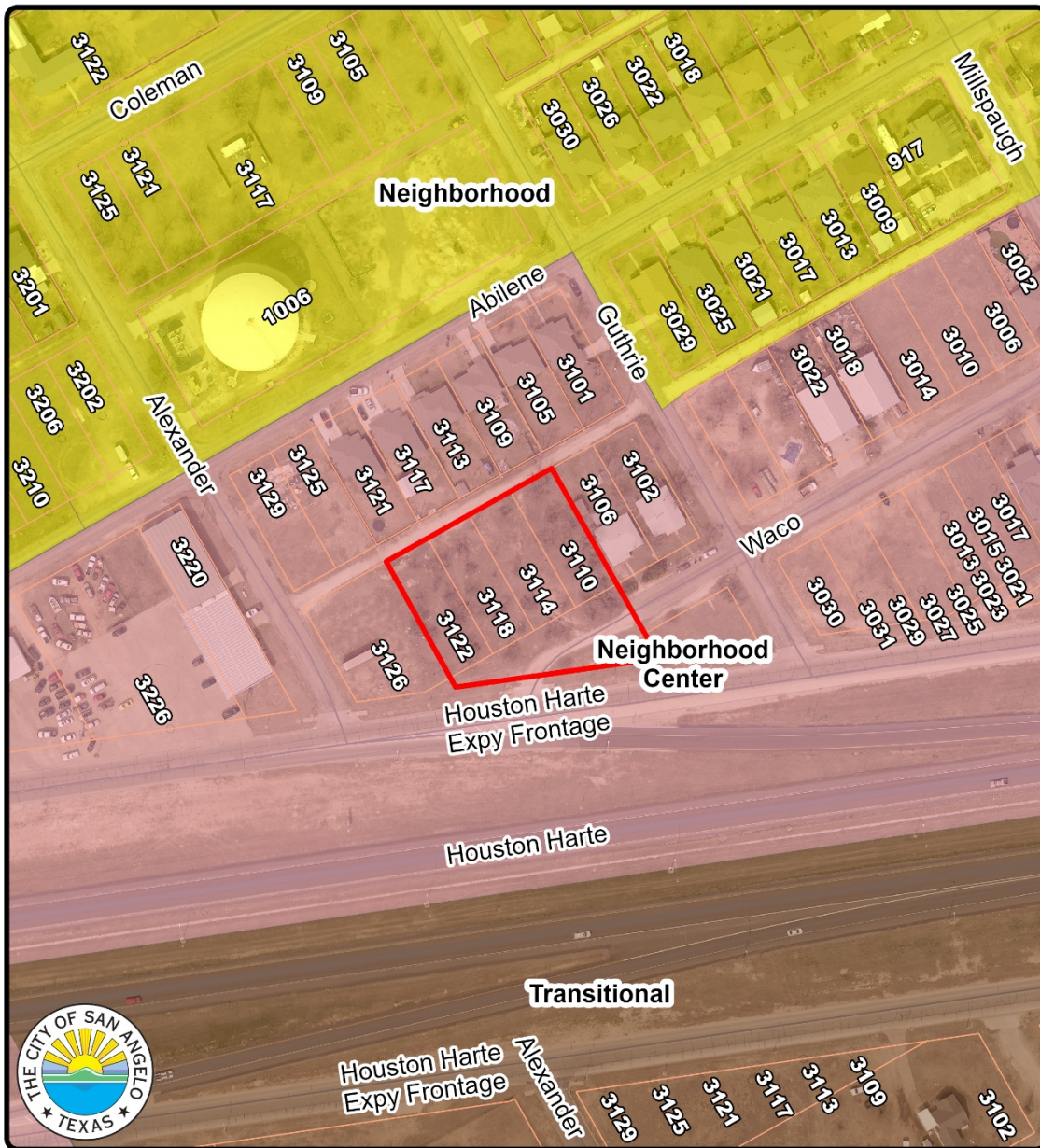
200' Range: —
Subject Property: —
Notified Properties: —

Scale: 0 0.010.01 0.03 0.04 0.06 Miles

N

December 15, 2025

Vision Plan



Vision Map
ZBA25-28: 3110, 3114, 3118, 3122 Waco
 Council District: #2 - Joe Self
 Neighborhood: Bluffs

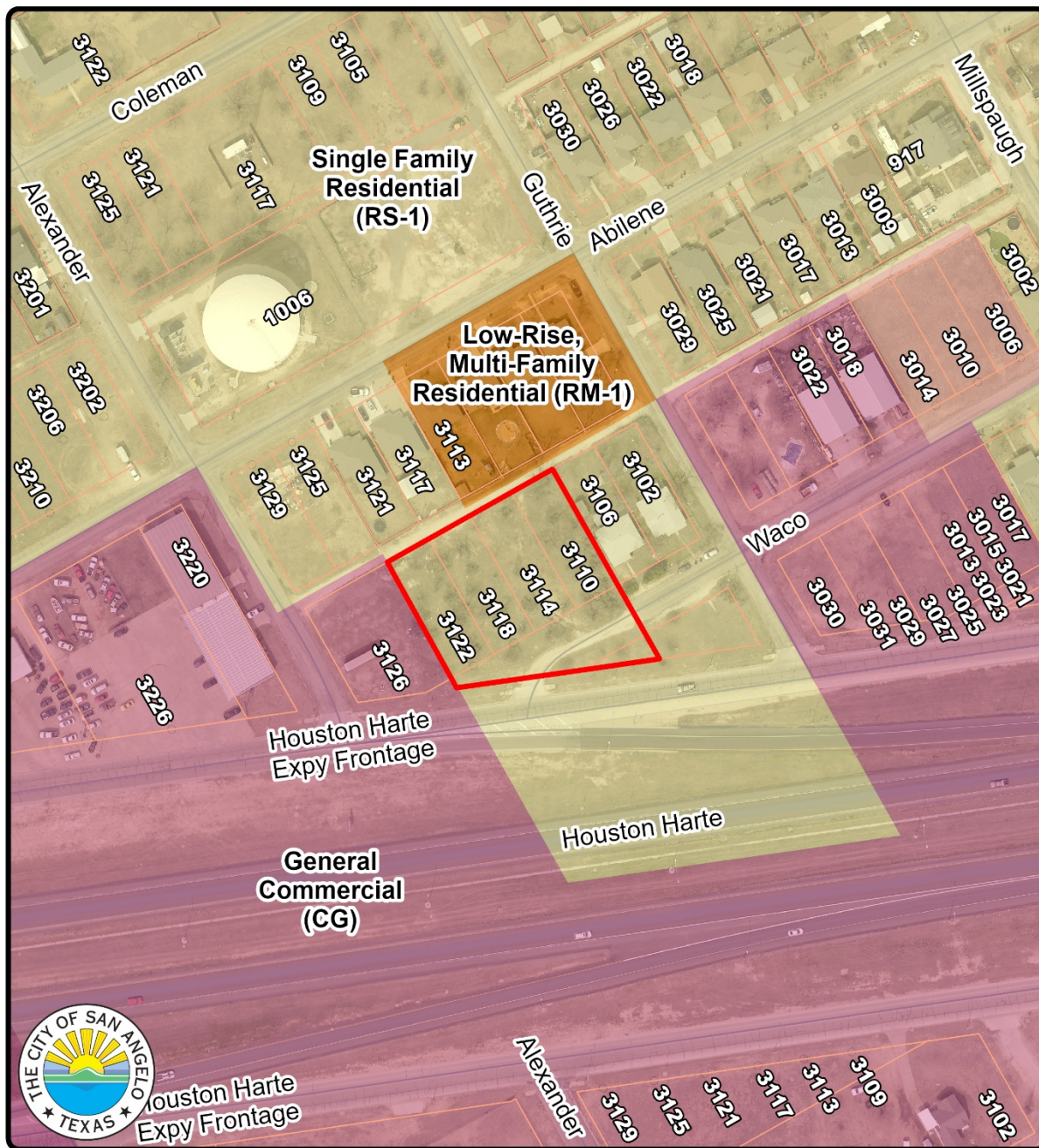
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Subject Property: —

N

December 15, 2025

Zoning Map



Zoning Map

ZBA25-28: 3110, 3114, 3118, 3122 Waco

Council District: #2 - Joe Self
Neighborhood: Bluffs

Subject Property: —

Scale: 0 0.01 0.01 0.03 0.04 0.06 Miles



AN ORDINANCE AMENDING CHAPTER 12, EXHIBIT "A" OF THE CODE OF ORDINANCES, CITY OF SAN ANGELO, TEXAS, WHICH ADOPTS ZONING REGULATIONS, USE DISTRICTS AND A ZONING MAP, IN ACCORDANCE WITH A COMPREHENSIVE PLAN, BY ZONING AND CLASSIFYING THE FOLLOWING PROPERTY: **APPROXIMATELY 0.67 ACRES LOCATED AT 3110, 3114, 3118, AND 3122 WACO STREET BEING LOTS 11-14 OF BLOCK 55 OF THE HATCHER ADDITION AND NORTH PART OF LOTS 3 AND 4 IN BLOCK 68 OF THE HATCHER ADDITION**; FROM SINGLE-FAMILY RESIDENTIAL (RS-1) TO NEIGHBORHOOD COMMERCIAL (CN); PROVIDING FOR SEVERABILITY; AND, PROVIDING FOR AN EFFECTIVE DATE

RE: Z25-28: 3110, 3114, 3118, and 3122 Waco St. and Acres: 0.026, Blk: 68, Subd: HATCHER ADDITION, N PART OF LOTS 3 & 4

WHEREAS, on the 15th day of December, 2025, the Planning Commission for the City of San Angelo in compliance with the City Charter, City ordinance and state law, and after holding a public hearing thereon, caused to be prepared and delivered a report and recommendation to City Council to approve the proposed Neighborhood Commercial (CN) Zoning District; and,

WHEREAS, on the 13th day of January, 2026, City Council held a public hearing on Z25-23, pursuant to published notice, and has considered the application, comments, reports and recommendations of the Planning Commission and staff, public testimony, and other relevant support materials.

NOW, THEREFORE, BE IT ORDAINED BY THE CITY OF SAN ANGELO:

SECTION 1: The basic zoning ordinance for the City of San Angelo, as enacted by the governing body for the City of San Angelo effective January 4, 2000, and included within Exhibit "A" of Chapter 12 of the Code of Ordinances of the City of San Angelo, and zoning map be and the same are hereby amended to designate the following described properties permanently zoned NEIGHBORHOOD COMMERCIAL (CN):

The real property located at 3110, 3114, 3118, and 3122 Waco St. described as 0.644 acres of Block 55, lots 11-14 in the Hatcher Addition and 0.026 acres, Blk: 68, Lots 3 and 4 in the Hatcher Addition for a total 0.67 acres described from all within the City of San Angelo, Tom Green County, Texas as more particularly described and depicted on Exhibit "A" of this Ordinance.

SECTION 2: The Director of the Planning & Development Department, or his/her designee, is hereby directed to correct zoning district maps in the office of the Planning & Development Department, to implement the zoning provision adopted herein, as further depicted on **Exhibit “A”** of this Ordinance.

SECTION 3: In all other respects, the use of the hereinabove described property shall be subject to all applicable regulations contained in Chapter 12 of the Code of Ordinances for the City of San Angelo, as amended.

SECTION 4: The remaining provisions of Chapter 12 of the Code of Ordinances of the City of San Angelo, Texas, not amended herein shall remain in full force and effect.

SECTION 5: The terms and provisions of this Ordinance shall be deemed to be severable in that, if any portion of this Ordinance shall be declared to be invalid, the same shall not affect the validity of the other provisions of this Ordinance.

SECTION 6: This Ordinance shall be effective on, from and after the date of adoption.

INTRODUCED on the **13th day of January, 2026**, and finally PASSED, APPROVED AND ADOPTED on this the **3rd day of February, 2026**.

THE CITY OF SAN ANGELO

Tom Thompson, Mayor

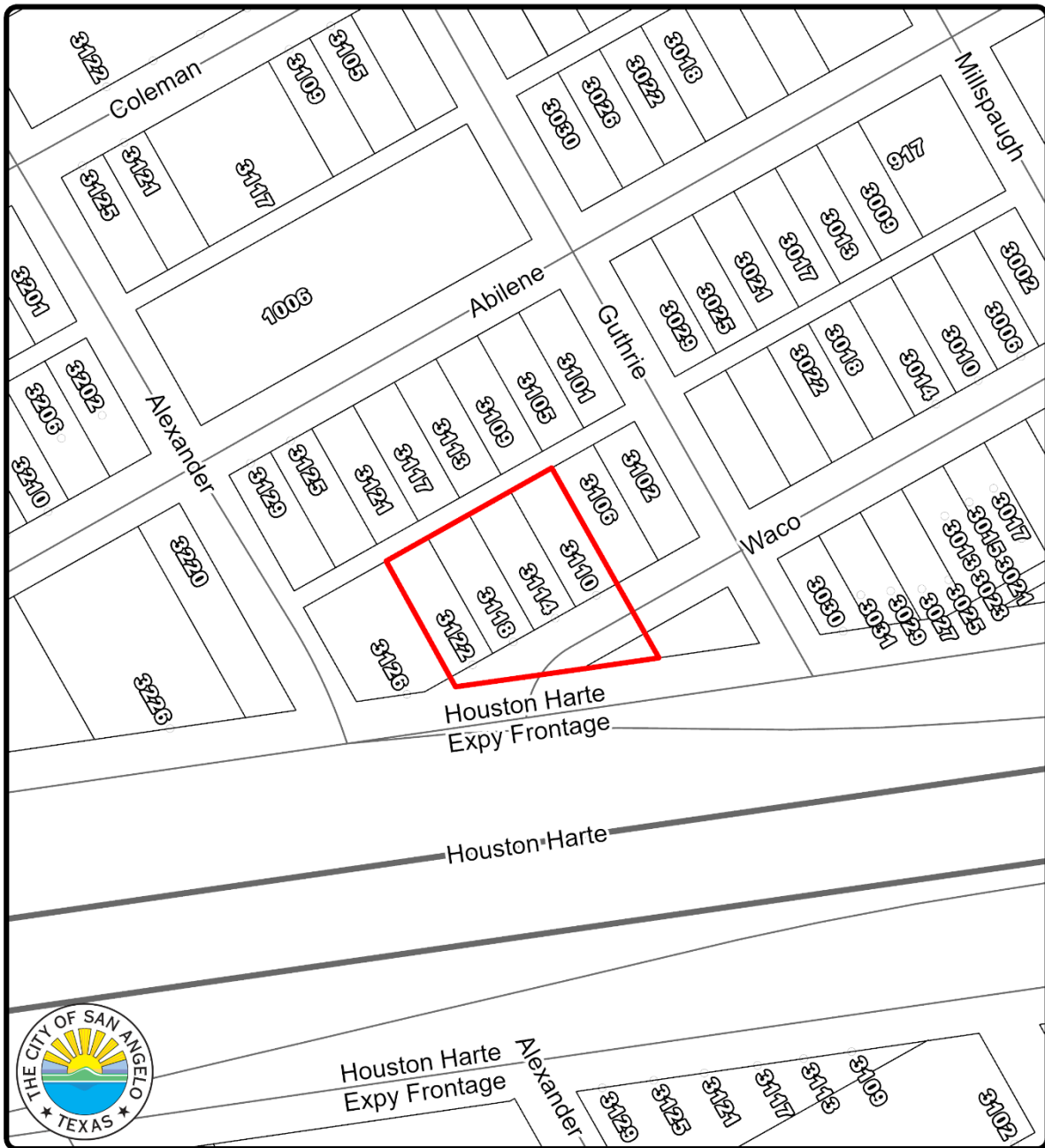
ATTEST:

Heather Stastny, City Clerk

APPROVED AS TO FORM:


Brandon Dyson, City Attorney

Exhibit "A"

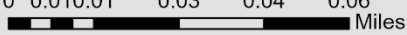


Ordinance Map ZBA25-28: 3110, 3114, 3118, 3122 Waco

Council District: #2 - Joe Self
Neighborhood: Bluffs

Subject Property: 

Zone Change: RS-1 to CN

Scale:  Miles



DATE: October 8, 2025
TO: City of San Angelo Development Corporation
FROM: Mike Prats, CDS Community Development Strategies
RE: Flood Impact Research – City of San Angelo Housing Market and Affected Properties



CDS has prepared a summary of research for the City of San Angelo Development Corporation. This study provides a rapid assessment of the expected short- and medium-term impacts of the flood on San Angelo's housing market and local economy. It draws upon secondary data from FEMA, the U.S. Census Bureau, HUD, and lessons learned from similar disasters in Houston, New Orleans, and Cedar Rapids. The intent is not to provide a full statistical or appraisal-based analysis, but rather a policy- and planning-oriented synthesis to inform recovery decisions.

JULY 4, 2025 FLOOD EVENT

San Angelo experienced a flood event July 4 on the northern and eastern portions of the city where at least 15 inches of rain fell making it the greatest rainfall total recorded in one day in the city's history. Tom Green County was quickly declared a major disaster eligible for federal assistance.

In the early morning hours of July 4, 2025, San Angelo, Texas, was struck by a catastrophic flash flood that inundated the city's north and northeast regions. Over 12,000 structures and more than 6,000 parcels were affected, prompting an immediate declaration of a natural disaster.

Between 3:00 and 4:00 a.m., flood advisories were issued as torrential rain overwhelmed drainage systems. Farm-to-Market Road 2105 was quickly closed, and water rescues began northwest and west of the CRC Roofers Coliseum near the intersection of FM 2105 and U.S. Highway 87. Entire sections north of Loop 306 and along North Chadbourne Street were submerged, with some homes and commercial properties taking on up to 15 feet of water.

The city's north side, known for its slower drainage, suffered the worst impacts as historic rainfall pushed overflow southeast through the San Angelo East Draw. The Bell Street overpass was completely flooded, cutting off key routes through the city. Neighborhoods such as Lake View, Carlsbad, and much of East San Angelo experienced widespread home inundations. High waters were also reported between Pulliam and Bell Streets, extending across Koberlin Street toward Paint Rock Road.

Rainfall totals reached at least 15 inches between Fruitland Farm Road and Grape Creek Road, with the storm water continuing to flow to the southeast. The floodwaters caused extensive structural damage and street closures as far west as North Pope Street and as far east as Goodfellow Air Force Base. Areas near the South Concho River, including the Texas Bank Sports Complex, reported flood damage.

Much of the north side, particularly around the west end of Chadbourne Street, remained under several feet of standing water well into the day. Roads near Grape Creek Road, Chadbourne Street, and East 41st Street were closed due to impassable low points. Along FM 2105, machine shops and warehouses saw 1 to 2 feet of flooding, while the triangle between West 43rd Street, Grape Creek Road, and Chadbourne held a significant amount of standing water. The back property of the San Angelo Cowboy Church was completely underwater, with depths reaching 3 to 4 feet around the livestock pens.

According to the National Weather Service, San Angelo received at least 14 inches of rainfall within a matter of hours. Low-lying areas filled rapidly, sending torrents of water into Lake View through Cactus Lane. Many homes bordering Chadbourne Street had floodwaters rising to their back porches, and several vehicles were abandoned, though some light traffic continued to navigate around barricades.

At a press conference, Shane Kelton, Executive Director of Public Works, reported record-breaking water volumes flowing through the north side of the city. He noted that the Bell Street gauging station peaked at an unprecedented 18 feet — one of the highest levels ever recorded in San Angelo. By 5:00 p.m., waters had gradually receded to about 8.5 to 9 feet.

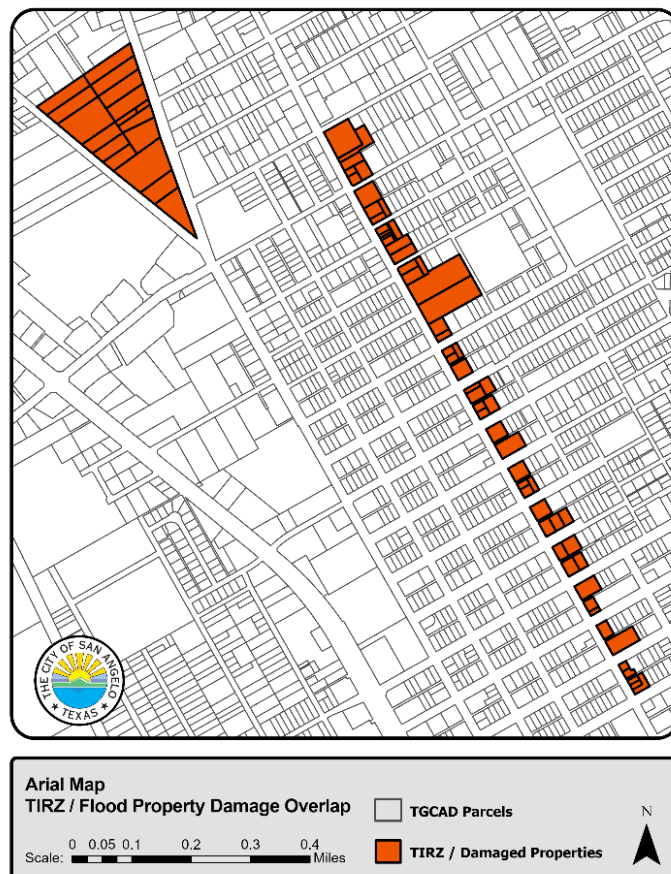
The Bell and Pulliam area bore some of the most significant damage, while neighborhoods south of the loop near the Concho River and Bell Street were identified as the hardest hit by the disaster.

San Angelo TIRZ

A Tax Increment Reinvestment Zone (TIRZ) is a designated area created by a municipality or county to promote economic development and redevelopment through tax increment financing. It allows local governments to capture the increase in property taxes generated by new developments within the zone to fund public improvements and infrastructure projects. San Angelo’s TIRZ was established in 2006 and reinvests property tax revenue from properties located within the TIRZ to fund new infrastructure and development projects.

The map below indicates flooded parcels located in the North Zone of the TIRZ (Tax Increment Reinvestment Zone).

North Zone TIRZ Flooded Parcels



TIRZ North Zone Recovery Assistance

The TIRZ board acted quickly to earmark funds to assist properties, businesses and affordable housing in flood recovery funding and support.

In response to the July 4 flooding event, the North Tax Increment Reinvestment Zone (TIRZ) has allocated \$1 million to support commercial property owners whose buildings sustained damage. This initiative aims to help eligible owners repair and restore their properties, ensuring a swift recovery for affected businesses within the community.

A total of 72 properties within the North TIRZ were identified as having experienced varying levels of damage, from minor to severe. To address these needs, the assistance program will remain open for 90 days, allowing property owners sufficient time to apply.

Under the program's guidelines:

- Eligibility is limited to properties zoned RM-1, RM-2, and Commercial.
- Each eligible property may receive up to \$55,000 in financial assistance.
- Funds may be used for building and site renovations, environmental remediation, safety enhancements, and drainage improvements directly related to flood damage.
- An initial 10% of the approved funds will be issued upfront upon submission of valid invoices or receipts, as determined by the Planning and Development Services Director.
- After the 90-day application period, any unallocated funds will automatically return to the North TIRZ fund for reallocation recommendations by the TIRZ Board and City Council.

This effort reflects the City's ongoing commitment to economic resilience and community recovery, helping businesses rebuild stronger and more sustainably after the disaster.

COSADC Immediate Recovery Assistance

To support residents affected by recent flooding, COSADC has designated \$1 million for affordable housing assistance within the impacted areas. This initiative is being administered by Galilee, with funding specifically targeted toward Type B affordable housing projects approved for recovery support. The goal is to ensure that residents with flood-damaged homes have access to safe, affordable, and resilient housing as they rebuild.

Under the program:

- Funding may be used to cover a range of expenses related to property repair and restoration.
- Permit fees for flood-affected affordable housing properties will be waived to reduce rebuilding costs.
- Projects tied to these properties will receive priority or expedited review to accelerate recovery timelines.
- Weekly coordination meetings with Galilee will take place to determine staffing needs and establish progress milestones, with the 60-day implementation period beginning July 23, 2025.

In addition to housing assistance, the recovery plan includes a strategic focus on flood infrastructure improvements, particularly at low-water crossings and high-impact areas. These upgrades are designed to mitigate future flood risks and strengthen community resilience.

While FEMA provides rapid financial assistance following disasters, its coverage often falls short of addressing total damage costs and long-term recovery needs. To bridge this gap, local businesses—many of which were directly or indirectly affected through employee hardship—will also receive economic support.

The Economic Development Corporation (EDC) will offer a range of tax-based and non-tax incentives to help local enterprises recover and retain jobs. These include:

- Property tax abatements, rebates, and exemptions
- Sales tax abatements, rebates, and exemptions
- Job creation and infrastructure grants
- City-funded infrastructure improvements

Together, these combined efforts aim to restore stability, promote economic recovery, and create a more flood-resilient community for both residents and businesses.

Flood Impact Research Review

Decades of disaster recovery research consistently show three key housing market outcomes following major floods:

- Loss of affordable stock – Naturally occurring affordable housing (NOAH) is most vulnerable due to its older construction and lower elevations. FEMA (2021) reported that nearly 40% of post-disaster rental loss nationwide occurs in properties renting below regional market averages.
- Displacement and rent escalation – HUD case studies following Hurricane Harvey (2017) and the Cedar Rapids Flood (2008) found short-term rent increases of **10–20%** in affected metros due to sharp declines in available stock.
- Uneven recovery – Higher-income homeowners tend to rebuild faster, while low-income renters and owners face longer-term displacement. Brookings (2019) documented that post-Harvey, many renters never returned due to affordability challenges.

The Congressional Research Service (2020) further emphasizes that small businesses also face prolonged challenges, with up to 40% failing to reopen after a major flood due to property damage, lost revenue, and delayed insurance/FEMA disbursements.

San Angelo Housing Market Impact

While flood impacts are immediate and visible in the form of damaged property, the consequences for housing markets, affordability, and long-term economic recovery often unfold more gradually.

San Angelo’s housing market prior to the flood was already characterized by aging housing stock and affordability constraints. According to ACS 2023 data:

- The city had approximately 43,600 housing units, with a median year built of 1977.
- Nearly 30% of homes were built before 1960, underscoring vulnerability to flood damage.
- Renters made up about 40% of households, a group most at risk for displacement.

Local reports following the July 4th flood indicate around 900 housing units sustained significant damage, with disproportionate impacts in lower-income neighborhoods near river corridors. Early FEMA claims data suggest substantial overlap between damaged units and the city’s most affordable stock, intensifying the risk of long-term shortages in accessible housing.

These homes and neighborhoods provide crucial NOAH that San Angelo desperately needs and relies as a supply of affordable housing.

The vast majority of these homes were moderate to low income residents. A large share of homeowners were retired and senior citizens, many of whom had paid off their mortgage. Additionally, almost all of the flooded homes were not located in a flood way or flood zone and therefore did not carry flood insurance. Some were also renters. In some cases, landlords have stepped up and started making repairs. Other landlords appear to be delaying repairs even as tenants remain living and paying rent in flooded rental homes.

- There are about 7 homes that require complete rebuilding that are not habitable
- Around 50 homes cannot be rebuilt because they are located in a flood way or flood zone – a potential buyout program is being investigated and in the meantime some residents will repair their damaged home and continue living there
- Many cannot afford to rent an apartment – their home was paid off, and they do not have an additional \$900 - \$1,200 a month to rent an apartment or home
- The maximum FEMA assistance amount for a home owner is \$44,000
- Damage of homes goes beyond flooded sheetrock, wiring and insulation – homes with roof damage or damaged bathrooms must be repaired first before other repairs can be made
- Costly home systems such as plumbing and HVAC must be repaired or completely replaced, adding to repair costs
- The volume of damaged interior doors that must be replaced has surged

Based on comparisons to similar disasters, San Angelo can expect:

- Short-term rental shortages leading to price escalation, especially for units at and below \$1,200/month.
- Strain on temporary housing options, with FEMA trailers or hotel vouchers providing only partial relief.
- Business closures and lost jobs, particularly among small retail and service establishments located in flood-prone corridors.

In Houston after Hurricane Harvey, average apartment rents rose 13% within six months, particularly in Class B and C properties. In Cedar Rapids, median rents jumped by 15% in the year after the 2008 flood, with the largest increases in workforce housing segments. San Angelo faces similar dynamics, with older rental stock disproportionately impacted.

Case Study Comparisons

Case 1: Houston, TX – Hurricane Harvey (2017)

- 204,000 homes damaged.
- Within a year, rents rose by 15% in the most affected submarkets (HUD, 2019).
- Affordable units were lost at twice the rate of market-rate housing, worsening existing shortages.

Case 2: Cedar Rapids, IA – Flood (2008)

- 5,000 housing units lost.
- Median rents increased by 15–20% in the year following.
- Displacement and demolition of older units reshaped the city's housing stock for a decade.

Case 2: Rio Grande Valley, TX – Flood and Hurricane (2014)

- A pilot project in the Rio Grande Valley, Texas, developed resilient and affordable housing solutions for low-to-moderate income families affected by hurricanes and flooding.
- The project introduced pre-assembled “core” shelters costing around \$25,000—far less than standard mobile units (\$125,000)—which could later be expanded into permanent affordable homes capable of withstanding hurricane-strength winds.
- Through a public-private partnership between the Texas Land Commission and three nonprofits, 20 core units were converted into permanent homes using private financing, architectural support, and financial counseling.
- Successfully provided long-term affordable housing, with all 20 homes still occupied today.

Conclusions and Recommendations

These examples suggest the July 4 flood will elevate rents and reduce affordable supply for at least 12–24 months, unless proactive preservation and rebuilding measures are taken.

The U.S. Federal Government’s policy does not fund permanent home construction. Therefore, local and state dollars must be used for permanent affordable housing.

Key Findings

- Housing supply stress in San Angelo is expected to persist for 12–24 months.
- The greatest losses are likely in older, lower-rent housing stock (NOAH), leading to affordability challenges.
- Small businesses in flood-affected corridors face significant risks of closure, compounding local employment impacts.

Recommendations

Short-Term (0–12 months):

- Expand emergency rental assistance for displaced households.
- Prioritize FEMA-funded repairs for multifamily and rental housing.
- Provide small business recovery grants to stabilize local service jobs.

Medium-Term (1–3 years):

- Create incentives to preserve and rehabilitate affordable housing before it is lost to demolition or speculative redevelopment.
- Fund workforce housing construction programs to accommodate displaced renters and new workers in the local economy.

Long-Term (3–5 years):

- Incorporate flood resilience standards into rebuilding codes, focusing on elevating structures, stormwater improvements, and green infrastructure.
- Use TIRZ funds for upgraded, resilient infrastructure that can also serve new affordable housing
- Explore federal and state funding for resilient infrastructure (CDBG-DR, HUD mitigation grants).
- Encourage mixed-use and higher-density infill development on small lots in safer areas to relieve supply pressure.

HELPFUL LINKS

FEMA Fact Sheets - <https://www.fema.gov/about/news-multimedia/fact-sheets>

COSA flood info - <https://www.sanangelo.gov/769/July-4-Flood-Information>

FEMA Reimbursement - <https://www.fema.gov/fact-sheet/fema-reimbursement-post-disaster-floodplain-management-and-building-code-administration>

Housing Inspections - <https://www.fema.gov/fact-sheet/what-expect-housing-inspections-2>

How to Apply for Assistance - <https://www.fema.gov/fact-sheet/how-apply-assistance>

Financial help after the disaster - <https://www.fema.gov/fact-sheet/financial-help-after-disaster>

Public Assistance Mitigation - <https://www.fema.gov/fact-sheet/public-assistance-mitigation>

GHBA – Building in a flood plain - <https://ghba.org/what-the-media-is-getting-wrong-about-building-and-floodplains/>

TEDC Recovery Guide - <https://texasedc.org/resources/resilience-and-recovery-guide-and-toolkit>

FEMA BRIC - Building Resilient Infrastructure and Communities Grant Program - <https://texasedc.org/assets/main/resources/ResilienceGuide/13.-fema-building-resilient-infrastructure-and-communities-funds.pdf>

FEMA Hazard Mitigation Assistance Portfolio - https://www.fema.gov/sites/default/files/2020-08/fema_mitigation-action-portfolio-support-document_08-01-2020_0.pdf

SAN ANGELO RESINTEL HOUSING STUDY

2024 UPDATE



SAN ANGELO RESINTEL HOUSING STUDY

2024 UPDATE

Prepared for:

City of San Angelo Development Corporation

69 N Chadbourne St,
San Angelo, TX 76903

June 2025

Prepared by:



1001 S. Dairy Ashford, Suite 450
Houston, TX 77077
(713) 465-8866
www.cdsmr.com

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INTRODUCTION

The City of San Angelo Development Corporation (COSADC) is a non-profit economic development corporation formed under the Texas Development Corporation Act of 1979 and governed by a seven-member board of directors. As directed by this Act, the Corporation's focuses its efforts on the promotion and development of business enterprises that create or retain primary jobs.

It is the mission of the City of San Angelo Development Corporation to work with economic development partners to retain, strengthen and diversify the job base of the community to ensure a vibrant business climate for San Angelo and the region.

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, findings, analysis, and suggestions for improvement related to the housing market in the City of San Angelo. The focus of this study centers on the following:

- Evaluation of supply and demand within the context of economic conditions and trends
- The magnitude and nature of demand for all types of housing deemed to be needed in San Angelo
- Conclude on overall opportunities that builders and developers can pursue to fulfill current and future needs

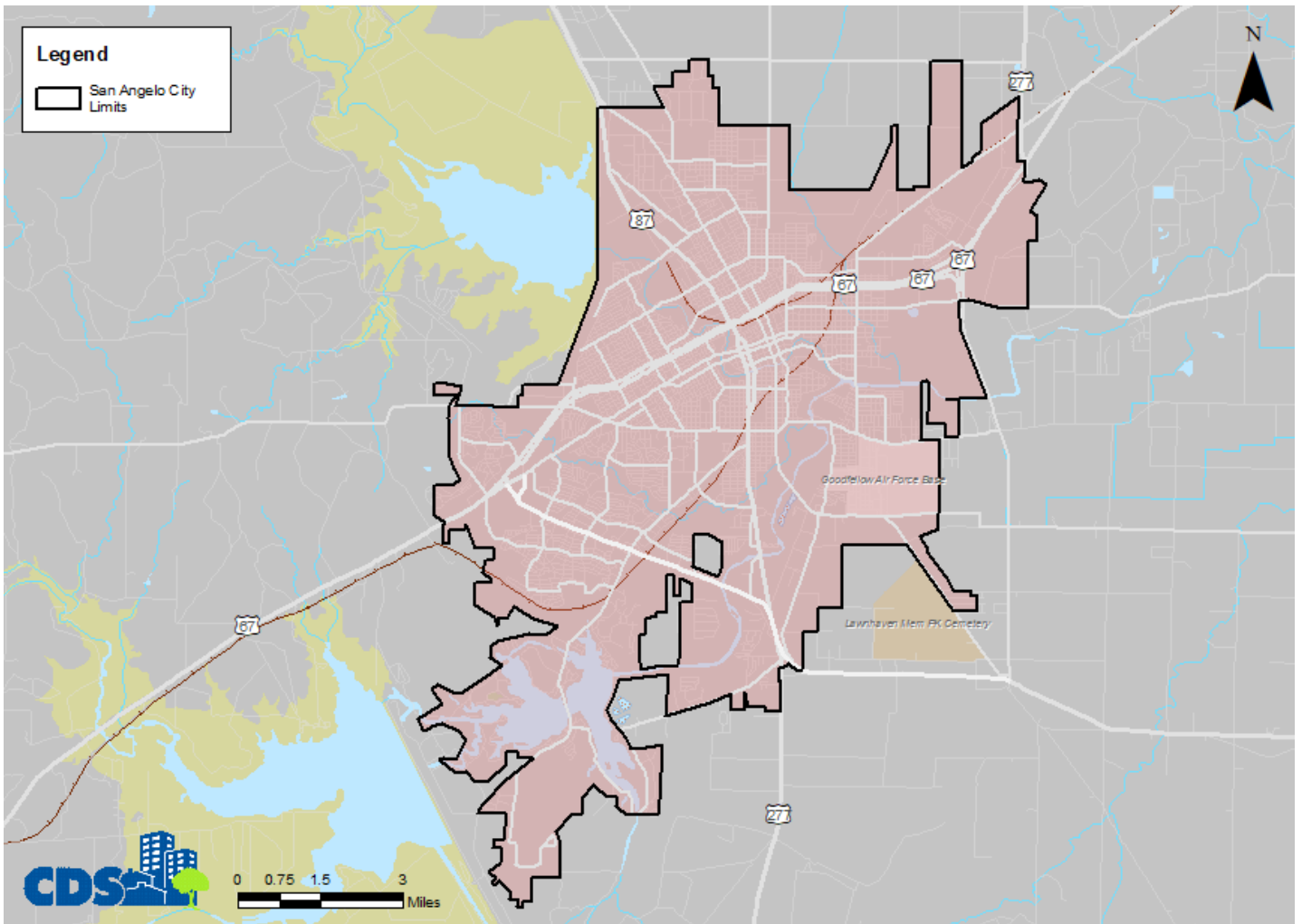
This study required a considerable amount of participation from local business, real estate professionals, and government staff, for which CDS is grateful.

STUDY AREA DESCRIPTION

This study examines the City of San Angelo, Texas and to a lesser extent San Angelo MSA and Tom Green County mostly for comparison purposes.

The City of San Angelo is the county seat and regional residential and economic hub of Tom Green County and offers the County major employment, retail shopping, recreational, educational and health care services.

Figure 1: San Angelo, Texas



EXECUTIVE SUMMARY

The City of San Angelo and Tom Green County emerged from the COVID shutdown with substantial job recovery and new job growth.

Although K-12 enrollment in San Angelo has decreased by about -2,000 since 2018-2019 and demographics estimates for 2020 to 2024 show a decrease of population in San Angelo of -200, Tom Green County is currently experiencing the highest employment in its history and population estimates may be understated.

Furthermore, Angelo State University continues to see 200 to 300 new students each year. That combined with the ongoing trainings and missions at Goodfellow Air Force Base plus overall job growth San Angelo is experiencing strong growth and a constant churn of residents, students and workers in and out of apartment and single-family rental units.

Shannon Hospital plans to hire around 1,000 additional workers in the next three to five years.

San Angelo's very strong industrial cluster has created new job growth and is exporting millions worth of products manufactured in San Angelo each year.

Local economic development has proven to be effective, growing the local economy and job base and is poised to continue to do so over the next three to five years.

When CDS first conducted the 2019 ResIntel the apartment and rental market was very tight and home building and buying activity was very high. This was accelerated in 2020 and 2021 but new rental developments like Creek 27 and Wolf Creek provided new supply that helped to moderate the market and keep prices from surging even higher. The rental market is poised to tighten again with added job growth and very low construction of new entry-level homes.

New housing permits has kept up somewhat well with new job growth but is slightly behind the 1 new housing permit per 2 new jobs benchmark for a balanced market.

In order to facilitate continued job growth and prevent greater housing price increases more apartments as well as for-sale and rental small lot entry level homes, town homes, patio homes, garden homes, duplex, triplex and fourplex homes will be required.

The greatest demand as well as lack of supply in the San Angelo housing market are entry level, first time buyer for-sale homes in the \$175,000-\$225,000 price range and rental units from \$875-\$1,300 a month.

CDS estimates housing demand in San Angelo over the next three to five years to range from 2,500 to 5,000 new units.

For new housing units to be as affordable and attainable as possible to San Angelo and Tom Green workers then more rental units and smaller lot, entry level for-sale homes in the form of missing-middle housing types should be allowed and facilitated.

Infrastructure and other supply side incentives for housing should also be explored.

Category	Data Point	Jobs	Housing To New Jobs Ratio	Housing Demand	Rental Unit Demand (45%)	For-Sale Unit Demand (55%)	Attainable Rent Price	Attainable For-Sale Price
Job Growth	New Jobs (2022-2025)	3,626	1:2	1,813	700	1,100	\$875-\$1,300	\$175,000-\$275,000
Future Job Growth Scenarios (2025-2030)	Conservative	2,500	1:2	1,250	563	688	\$875-\$1,300	\$175,000-\$275,000
	Average	3,500	1:2	1,750	788	963	\$875-\$1,300	\$175,000-\$275,000
	Aggressive	5,000	1:2	2,500	1,125	1,375	\$875-\$1,300	\$175,000-\$275,000

Reducing Local Barriers to Housing Affordability: Local Government Policy Recommendations

According to U.S. Census Bureau data the average square feet of new homes as of Q1 2025 was 2,408 square feet. In 2024 only 264,000 homes 1,800 square feet or less were built, compared to 500,000 in 2004.

An entry level or starter home is typically 1,800 square feet or smaller.

- Smaller end (975–1,400 SF)
- Mid-range (1,400–1,600 SF)
- Upper end (1,600–1,800 SF): Still considered starter homes in many low-cost regions or for families needing 3 bedrooms.

Local government housing construction standards, requirements and regulations have a significant impact on the construction and cost of new entry level homes.

The following recommendations are intended to help local governments and planning agencies reduce regulatory costs, improve housing affordability and facilitate new entry level starter home and missing-middle construction. These strategies are based on national research, and local planning best practices.

1. Legalize and Support Missing Middle Housing Across All Residential Zones

- Legalize Missing Middle Housing Types (2–5 units) in all residential areas, with density adjusted to local infrastructure and population.
- Allow by-right conversions of single-family homes into duplexes or triplexes.
- Permit backyard cottages (ADUs) and small lot multiplexes (up to fourplexes) in all zones.
- Allow new starter homes by-right in all residential zones to broaden entry-level ownership options.

2. Reform Zoning Standards to Unlock More Buildable Land

- Reduce or eliminate minimum lot sizes in single and multifamily zones, especially in infill areas.
- Target: 1,400–2,000 sq. ft. or less.
- Permit subdivision/splitting of existing lots to enable small-scale developments like townhomes.
- Increase lot coverage allowances (up to 60% or more) and reduce setback requirements.
- Allow zero-lot-line homes and flexible setbacks.
- Increase building heights up to at least 4 stories.

3. Remove Excessive Parking Mandates

- Cap parking at 0.5 spaces per unit for multifamily housing.
- Eliminate parking requirements for:
 - Units under 1,400 sq. ft., ADUs, childcare centers, affordable homes, and other priority uses.
- Encourage shared parking models and fee-based parking stalls to avoid overbuilding.

4. Streamline Permitting, Review & Entitlement Processes

- Allow by-right construction for missing-middle housing to avoid unnecessary delays.
- Develop pre-approved house plan sets for faster deployment of small-scale housing.
- Simplify review timelines and provide online or automated permitting tools.
- Reduce or waive fees in areas with infrastructure capacity or urgent housing needs.
- Calibrate impact fees based on square footage to encourage smaller homes.
- Lower or eliminate impact fees for ADUs, duplexes, townhomes, and small-lot infill homes.

5. Reform Building and Infrastructure Codes

- Create a residential code carveout for structures up to six units, exempting them from the full commercial building code.
- Permit single staircases in buildings up to six units to expand options on smaller lots.
- Remove exclusionary infrastructure standards:
 - Avoid oversized roads/utilities unless necessary for safety or environmental health.
 - Allow flexibility in materials, architecture and design.

6. Ensure Fair, Transparent, and Affordable Development Costs

- Ensure proportional and justifiable development/impact fees, especially for:
 - First-time buyer units, working families, seniors, and small-scale developments.
- Conduct affordability impact reviews when updating zoning or subdivision standards.
- Identify and remove cost-prohibitive rules.

7. Align Infrastructure Investment & Housing Development

- Integrate land use planning with infrastructure investments.
- Use tools like TIRZ, TIF, PILOT, 380 agreements, and local housing incentives to offset utility and infrastructure costs.
- Provide city-backed financing tools to unlock favorable rates without excessive risk.
- Coordinate site preparation funding to expand affordable entry-level housing.

8. Support an Ecosystem of Incremental Developers

- Encourage local, small-scale developers who can build 1–4 units affordably and in context.
- Enable streamlined regulations for homeowner-led or small builder projects.
- Leverage public-private partnerships and workforce housing incentives to align supply with employment trends.

Cost of Regulations

Regulation imposed by all levels of government is estimated to account for an average of 25% of the final price of a new single-family home built for sale.

During the construction phase of a house, meaning after a builder has acquired or developed the underlying lot, regulation on average accounts for 14.5% of construction costs.

This includes actual hard costs of fees paid by the builder, as well as the cost of changes to construction codes and design standards.

While some of the cost of regulation is absorbed by the builder, at least 10% of the final sales price of a home is passed on to the homebuyer and directly attributable to the regulatory costs imposed during construction. Thus, government regulations have a clear and direct impact on housing affordability by influencing house prices.

DEMOGRAPHIC AND ECONOMIC ANALYSIS

Past, present and future demographic figures were collected and estimated by utilizing data from the following sources: U.S. Census Bureau, American Community Survey, Environics by Envision (hereafter referred to as “Environics”), Bureau of Labor Statistics, Texas Workforce Commission Labor Market Information, Quarterly Census of Employment and Wages (QCEW), City of San Angelo Development Corporation, San Angelo Chamber of Commerce, Downtown San Angelo Inc., City of San Angelo Planning and Development, Goodfellow Airforce Base, San Angelo Apartment Association, San Angelo Association of Realtors and primary research completed by CDS Market Research.

Thanks goes out to City of San Angelo Economic Development Corporation and other City entities instrumental in completing this report.

Population and Households

Table 2 provides population and household counts for 2010 to 2024, as well as estimates for 2029.

- Data shows a slight decrease of -200 residents from 2020 to 2024 in San Angelo, however, estimates for Tom Green County show an increase of 400 new residents in that time.
- From 2024 to 2029 population is expected to increase in San Angelo by 550 new residents and 1,200 in Tom Green County.

Table 2: Population and Households, 2010 to 2024

Population	2010 Census	2020 Census	2024 Environics	2029 Projection	Change 2020 to 2024	% Change 2020 to 2024	Change 2024 to 2029	% Change 2024 to 2029
City of San Angelo	92,844	99,893	99,691	100,242	-202	-0.2%	551	0.6%
Tom Green County	110,221	120,003	120,399	121,570	396	0.3%	1,171	1.0%
Households	2010 Census	2020 Census	2024 Environics	2029 Projection	Change 2020 to 2024	% Change 2020 to 2024	Change 2024 to 2029	% Change 2024 to 2029
City of San Angelo	35,990	39,440	39,331	39,547	-109	-0.3%	216	0.5%
Tom Green County	42,329	46,683	46,816	47,266	133	0.3%	450	1.0%

Sources: U.S. Census Bureau, 2010, 2020, Nielsen/Claritas 2024, 2029 Estimates – Environics)

Age Distribution

Table 3 contains a breakdown of the 2024 populations for San Angelo and Tom Green County by age range.

- Median age in San Angelo is 35.8, and 36.6 in Tom Green County.
- San Angelo has a significant Millennial population (anyone born between 1981 and 1996/ages 43 to 28 in 2025) – 62% of San Angelo residents are in the Millennial generation cohort.
- Ages 0-9 accounted for 12.4% (12,361) of the population.
- Ages 10-17 accounted for 10.5% (10,423) of the population.
- San Angelo’s child age groups (Age 0 to 9) were nearly 20% greater than older school age groups (Age 10 to 17).
- This indicates an opportunity to existing and new business growth that benefit greatly from a significant family base that will age along with businesses and provide lucrative patronage and future business growth opportunities.

Table 3: Population by Age, 2024

Age	San Angelo		Tom Green County	
	Count	Share	Count	Share
Total	99,691		120,399	
Age 0 to 4	6,203	6.2%	7,464	6.2%
Age 5 to 9	6,158	6.2%	7,474	6.2%
Age 10 to 14	6,367	6.4%	7,891	6.6%
Age 15 to 17	4,056	4.1%	4,906	4.1%
Age 18 to 20	5,045	5.1%	5,848	4.9%
Age 21 to 24	6,062	6.1%	6,973	5.8%
Age 25 to 34	14,828	14.9%	17,044	14.2%
Age 35 to 44	12,779	12.8%	15,386	12.8%
Age 45 to 54	9,990	10.0%	12,306	10.2%
Age 55 to 64	10,648	10.7%	13,382	11.1%
Age 65 to 74	9,878	9.9%	12,398	10.3%
Age 75 to 84	5,432	5.5%	6,702	5.6%
Age 85 and over	2,245	2.3%	2,625	2.2%
Age 16 and over	79,623	79.9%	95,946	79.7%
Age 18 and over	76,907	77.1%	92,664	77.0%
Age 21 and over	71,862	72.1%	86,816	72.1%
Age 65 and over	17,555	17.6%	21,725	18.0%
Median Age	35.8		36.6	

Source: Environics 2024

Race and Ethnicity

Table 4 shows the estimated racial and ethnic makeup of San Angelo and Tom Green County.

Table 4: Racial or Ethnic Makeup, 2024

Race or Ethnicity	San Angelo		Tom Green County	
	Count	Share	Count	Share
Total Population	99,691		120,399	
White Alone	46,120	46.3%	60,097	49.9%
Black or African American Alone	3,803	3.8%	4,041	3.4%
American Indian and Alaska Native Alone	292	0.3%	372	0.3%
Asian Alone	1,539	1.5%	1,630	1.4%
Native Hawaiian and Other Pacific Islander Alone	117	0.1%	129	0.1%
Some Other Race Alone	303	0.3%	356	0.3%
Hispanic or Latino	27,978	28.1%	31,486	26.2%
Two or More Races	19,539	19.6%	22,287	18.5%

Source: Environics 2024

Household Size and Type

Table 5 shows 2024 household size and average household size for San Angelo and Tom Green County.

- Average household size in San Angelo was 2.45

Table 5: Household Size, 2024

Household Size	San Angelo		Tom Green County	
	Count	Share	Count	Share
Total:	39,331		46,816	
1-person household	11,878	30.2%	13,318	28.5%
2-person household	12,611	32.1%	15,402	32.9%
3-person household	6,162	15.7%	7,321	15.6%
4-person household	4,800	12.2%	5,927	12.7%
5-person household	2,333	5.9%	2,914	6.2%
6-person household	986	2.5%	1,218	2.6%
7-or-more person household	561	1.4%	716	1.5%
Average Household Size	2.45		2.50	

Source: Environics 2024

Table 6 shows past, current and future data for family and nonfamily household types, which distinguishes between family and non-family households, in San Angelo and Tom Green County.

- Households in San Angelo have increased by 3,341 since 2010, an average per year of about 240 from 2010 to 2024.

Table 6: Family and Nonfamily Households, 2024

Households	San Angelo		Tom Green County	
	Count	Share	Count	Share
2029 Projection	39,547		47,266	
2024 Estimate	39,331		46,816	
2020 Census	39,440		46,683	
2010 Census	35,990		42,329	
Growth 2024-2029	0.5%		1.0%	
Growth 2020-2024	-0.3%		0.3%	
Growth 2010-2020	9.6%		10.3%	
2024 Households by Household Type				
Family Households	25,126	63.9%	30,880	66.0%
Nonfamily Households	14,205	36.1%	15,936	34.0%

Source: Environics 2024

Table 7 shows past, current and future data for family households and poverty in San Angelo and Tom Green County.

- In San Angelo 10% (2,589) of family households are Below Poverty with 2,055 Below Poverty with Children.

Table 7: Family Households and Poverty, 2024

Family Households	San Angelo		Tom Green County	
	Count	Share	Count	Share
2029 Projection	25,330		31,263	
2024 Estimate	25,126		30,880	
2020 Census	24,744		30,299	
2010 Census	22,823		27,729	
Growth 2024-2029	0.8%		1.2%	
Growth 2020-2024	1.5%		1.9%	
Growth 2010-2020	8.4%		9.3%	
2024 Families by Poverty Status				
At or Above Poverty	23,058	91.8%	28,407	92.0%
At or Above Poverty with Children	10,506	41.8%	12,973	42.0%
Below Poverty	2,068	8.2%	2,473	8.0%
Below Poverty with Children	1,769	7.0%	2,049	6.6%

Source: Environics 2024

Household Income

Table 8 below shows 2019 household income. The average and median 2019 household income has been adjusted for inflation to 2024 dollars.

Table 8: Household Income, 2019

Household Income	San Angelo		Tom Green County	
	Count	Share	Count	Share
Total Households	39,743	100%	46,995	100%
Less than \$15,000	4,417	11%	4,909	10%
\$15,000 to \$24,999	4,951	12%	5,575	12%
\$25,000 to \$34,999	5,096	13%	5,793	12%
\$35,000 to \$49,999	6,035	15%	6,910	15%
\$50,000 to \$74,999	7,383	19%	8,853	19%
\$75,000 to \$99,999	4,404	11%	5,277	11%
\$100,000 to \$124,999	2,715	7%	3,453	7%
\$125,000 to \$149,999	1,600	4%	2,170	5%
\$150,000 to \$199,999	1,403	4%	1,850	4%
\$200,000 to \$249,999	618	2%	802	2%
\$250,000 to \$499,999	775	2%	994	2%
\$500,000 or more	346	1%	409	1%
Average Household Income (2024\$)	\$85,173	-	\$88,586	-
Median Household Income(2024\$)	\$59,435	-	\$62,426	-

Source: Census 2019

Table 9 shows 2024 household incomes as well as average, median and per capita household income.

Table 9: Household Income, 2024

Household Income	San Angelo		Tom Green County	
	Count	Share	Count	Share
Total Households	39,331		46,816	
Less than \$15,000	4,323	11%	4,776	10%
\$15,000 to \$24,999	3,563	9%	4,131	9%
\$25,000 to \$34,999	3,845	10%	4,419	9%
\$35,000 to \$49,999	4,498	11%	5,324	11%
\$50,000 to \$74,999	7,271	18%	8,601	18%
\$75,000 to \$99,999	5,794	15%	6,860	15%
\$100,000 to \$124,999	3,982	10%	4,858	10%
\$125,000 to \$149,999	2446	6%	3073	7%
\$150,000 to \$199,999	2033	5%	2602	6%
\$200,000 - \$249,999	775	2%	1,032	2%
\$250,000 - \$499,999	626	2%	882	2%
\$500,000+	175	0%	258	1%
Average Household Income	\$76,287		\$79,486	
Median Household Income	\$61,453		\$63,428	
Per Capita Household Income	\$30,097		\$30,907	

Source: Environics 2024

- San Angelo’s estimated 2024 average household income of \$76,287 is greater than median household income of \$61,453.
- The gap between average and median income often signals income inequality due to a small number of very high income households making significantly more than the majority.
- Relying only on average income can overstate the typical income experience in a community.
- For planning, policy, or development purposes, the median income gives a more accurate picture of what most households actually earn.
- When assessing housing affordability, retail demand, or workforce needs, understanding this disparity helps prevent overestimating what the typical household can afford.

Table 10 below provides projected household income change for the City and County for 2019 to 2024. Income from 2019 has been adjusted for inflation and converted into 2024 dollars.

Looking at changes in average and median household income from 2019 to 2024 can provide a glimpse into possible shifts in San Angelo’s local housing market.

Table 10: Household Income Change, 2019 to 2024

Household Income	San Angelo		Tom Green County	
	Change	% Change	Change	% Change
Total Households	-412	-1.0%	-179	-0.4%
Average Household Income	-\$8,886	-10.4%	-\$9,100	-10.3%
Median Household Income	\$2,018	3.4%	\$1,002	1.6%

Source: PCensus 2019, Environics 2024

- Inflation adjusted average household income in San Angelo in 2019 was \$85,173 and in 2024 was \$76,287.
- Inflation adjusted median household income in San Angelo in 2019 was \$59,435 and in 2024 was \$61,453.
- Estimated projections for 2024 show the City and County adding 2,413 households as well as median and average household income growth, a positive sign for the community.
- Household growth in the lowest and middle-income brackets is projected to increase and continue to remain the largest demand segment for rental and for-sale housing in the City.
- Higher income households are predicted to increase, especially the \$100,000 to \$149,999 cohort in San Angelo.
- It is important to keep in mind that the majority of higher income households in most cases are older in age, as one might expect. The 55 and older cohorts with \$75,000 and greater household incomes should be an emerging housing market segment to be mindful of as time moves forward as growing demand from 2019 on may justify the increase of supply targeted for this segment.
- The 2024 income projection does not expect the distribution of income levels to alter much from 2019 estimates. This trend could be altered depending on the income levels of new jobs created in the City from 2019 to 2024.

Table 11 shows population and median household income of cities with similar population of San Angelo and Tom Green County.

- San Angelo has a greater median household income than Wichita Falls, Edinburg, and Beaumont.

Table 11: Texas Peer Cities Population and Median Household Income, 2024

City	Population	Median Household Income
San Angelo	98,568	\$62,378
Wichita Falls	103,005	\$56,073
Edinburg	107,781	\$54,361
New Braunfels	110,379	\$86,025
Conroe	110,740	\$74,210
Beaumont	111,699	\$50,659
Tyler	113,676	\$66,107
Sugar Land	116,379	\$131,780
Odessa	120,433	\$69,521
League City	121,142	\$106,518
Allen	121,676	\$126,579
The Woodlands	125,352	\$135,234
Richardson	125,708	\$96,091
Lewisville	127,009	\$83,696

Source: Environics 2024

Educational Attainment

Table 12 provides educational attainment data, which shows the highest level of education attained by the 25 years and older population.

- 55.7% of San Angelo’s population older than 25 have pursued some form of higher education and 30.2% have obtained a degree.

Table 12: Educational Attainment, 2024

Educational Attainment	San Angelo		Tom Green County	
	Count	Share	Count	Share
Population Age 25+ by Edu. Attainment	65,800		79,843	
Less than 9th grade	4,555	6.9%	5,351	6.7%
Some High School, no diploma	4,478	6.8%	5,182	6.5%
High School Graduate (or GED)	20,125	30.6%	25,227	31.6%
Some College, no degree	16,743	25.5%	19,939	25.0%
Associate Degree	4,298	6.5%	5,143	6.4%
Bachelor's Degree	10,267	15.6%	12,681	15.9%
Master's Degree	3,772	5.7%	4,527	5.7%
Professional School Degree	769	1.2%	886	1.1%
Doctorate Degree	793	1.2%	907	1.1%

Source: Environics 2024

School District Enrollment

San Angelo ISD School enrollment is displayed in Table 13.

Table 13: San Angelo K-12 School Enrollment, 2019 to 2024

San Angelo ISD Enrollment	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2019-2024 Change	2019-2024 % Change
Totals by Year	15,080	14,574	14,100	13,860	13,548	13,180	-1,900	-12.6%

Source: Texas Education Agency

- San Angelo ISD decreased by about 2,000 students from the 18-19 school year to the 23-24 school year.
- Interviews with employers and other City institutions indicated that San Angelo ISD does not experience intense competition from surrounding districts and is favored in the region amongst most parents of school aged youth.
- A few mentioned a preference for Wall ISD to San Angelo local workers and business owners, though Wall has just around 100 existing homes.

SAN ANGELO EMPLOYMENT TRENDS

Employment in the city and county is a key indicator used in determining the demand for housing, as well as the principal driver of population and household growth.

The information in this section provides general and detailed employment statistics for Tom Green County and the San Angelo area.

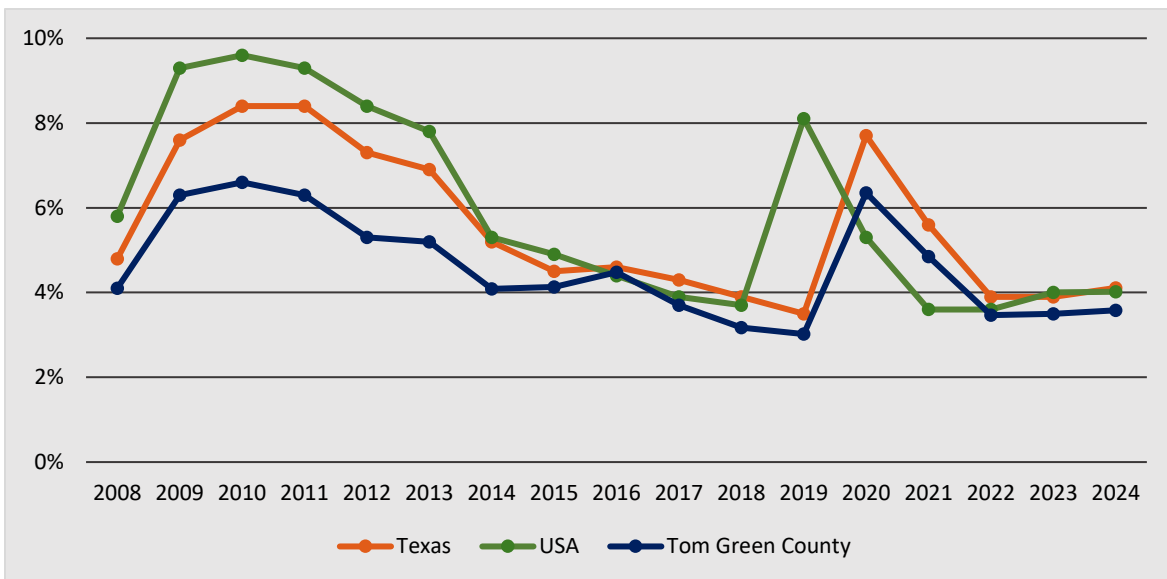
About 80% of Tom Green County's employment is located in the City of San Angelo. Therefore, Tom Green County level employment and industry data in this report should be understood to be representative of San Angelo.

Unemployment Rates

Tom Green County unemployment rates have consistently been lower than State and National rates since 2008.

- San Angelo and Tom Green County have a very stable and resilient local economy.

Figure 14: United States, Texas and Tom Green County Unemployment Rates, 2008-2024



Source: Texas Workforce Commission Tracer2. Not Seasonally Adjusted

Table 15 displays the employers that provide the economic foundation of San Angelo and Tom Green County.

As of 2024, there were an estimated 22,133 employees working at the largest 19 businesses in the City, 40% of Tom Green County employment of 57,653 workers.

Table 15: Major San Angelo Employers

Company	Employees	Industry
Goodfellow Air Force Base	6,149	Military Training Center
Shannon Health System (All Campuses)	4,900	Hospitals and Clinics
San Angelo ISD	2,000	Public School System
Angelo State University	1,904	University
Ethicon, Inc.	1,000	Medical Device Manufacturing
City of San Angelo	931	Municipal Government
San Angelo State Supported Living Center	770	State School
TimeClock Plus	637	Time Management Software
Tom Green County	627	County Government
SITEL, Inc.	472	Teleservicing
BlueCross BlueShield of Texas	406	Medical Claims Processing
Lone Star Beef Processors	385	Beef Processing
BEPC Inc.	364	Consulting Services
Baptist Retirement Center	358	Retirement Community
Reece Albert / CSA Materials	300	Highway Construction / Construction Material Merchant
Time Clock Plus (TCP)	280	Software Publishers
Housley Group	233	
West Texas Medical Associates	217	Physician Offices
Gandy Ink	200	Commercial Screen Printing / Advertising
Total	22,133	

Source: City of San Angelo Development Corporation, 2024

Occupations of Residents

Table 16 below displays the employment by industry for the age 16 and over work force in San Angelo and Tom Green County.

This data shows the occupation of residents living in San Angelo, not necessarily employed in San Angelo.

The lower section of the table shows the breakdown of white collar, blue collar and service/farm workers.

Top occupations for San Angelo residents in 2024 include:

- Office/Admin. Support – 6,540
- Sales/Related – 4,889
- Management – 3,958

Table 16: Occupation of Residents, 2024

Occupation	San Angelo		Tom Green County	
	Count	Share	Count	Share
Civ. Employed Pop 16+ by Occupation	48,685		58,010	
Architect/Engineer	328	0.7%	413	0.7%
Arts/Entertainment/Sports	881	1.8%	940	1.6%
Building Grounds Maintenance	1,385	2.8%	1590	2.7%
Business/Financial Operations	1,292	2.7%	1481	2.6%
Community/Social Services	1006	2.1%	1130	1.9%
Computer/Mathematical	1358	2.8%	1511	2.6%
Construction/Extraction	3,766	7.7%	4564	7.9%
Education/Training/Library	3,006	6.2%	3646	6.3%
Farming/Fishing/Forestry	341	0.7%	631	1.1%
Food Prep/Serving	3,520	7.2%	3976	6.9%
Healthcare Practitioner/Technician	2,693	5.5%	3,514	6.1%
Healthcare Support	2,248	4.6%	2512	4.3%
Maintenance Repair	1,845	3.8%	2415	4.2%
Legal	243	0.5%	286	0.5%
Life/Physical/Social Science	239	0.5%	278	0.5%
Management	3,958	8.1%	5,008	8.6%
Office/Admin. Support	6,540	13.4%	7,473	12.9%
Production	2,812	5.8%	3,399	5.9%
Protective Service	1328	2.7%	1536	2.6%
Sales/Related	4,889	10.0%	5,776	10.0%
Personal Care/Service	1,983	4.1%	2245	3.9%
Transportation/Moving	3,024	6.2%	3,686	6.4%
2024 Est. Pop 16+ by Occupation Classification				
Blue Collar	26,433	54.3%	31,456	54.2%
White Collar	11,447	23.5%	14,064	24.2%
Service & Farm	10,805	22.2%	12,490	21.5%

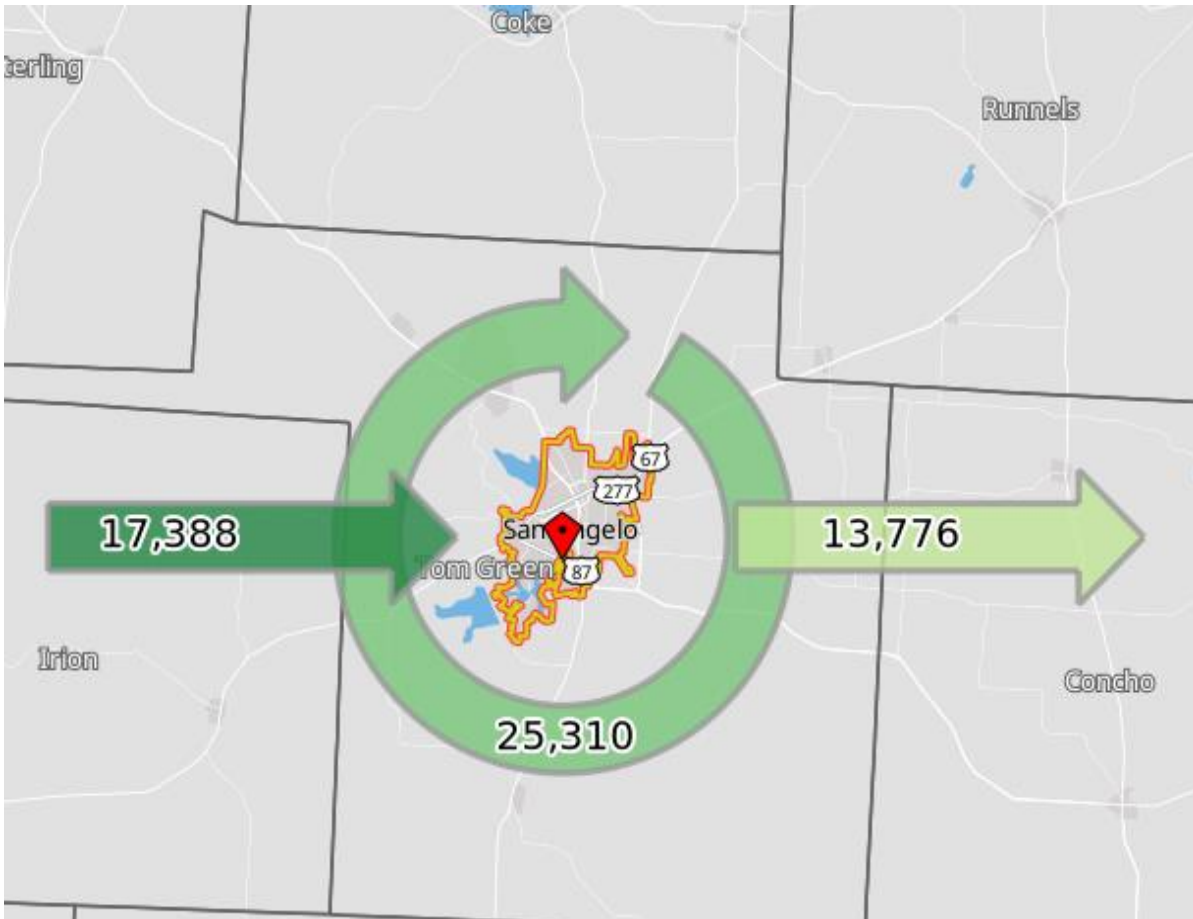
Sources: Environics 2024

Job Inflow and Outflow

Figure 17 shows the 2022 (most recent year data available) inflow and outflow of those employed in San Angelo. The dark green arrow indicates workers employed in San Angelo yet live outside.

The lighter green round arrow represents those employed and living in San Angelo. The lightest green arrow shows the number of those living in San Angelo yet employed outside of the City.

Figure 17: San Angelo Job Inflow/Outflow, 2022



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

Table 18 shows San Angelo job inflow and outflow data for 2022.

Although the data is dated, the share of those living and working in San Angelo should be relatively unchanged. Nevertheless, San Angelo still experiences some leakage with 40% of workers living outside the City.

Table 18: San Angelo LEHD Inflow/Outflow Job Counts, 2022

Inflow/Outflow Job Counts (All Jobs)	Count	Share
Employed in the Selection Area	42,698	100.0%
Employed in the Selection Area but Living Outside	17,388	40.7%
Employed and Living in the Selection Area	25,310	59.3%
Living in the Selection Area	39,086	100.0%
Living in the Selection Area but Employed Outside	13,776	35.2%
Living and Employed in the Selection Area	25,310	64.8%

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

The share of residents working in San Angelo yet living outside the City provide an opportunity to understand their housing and quality of life preferences and work to capture them as new households in the City.

Though there are some, such as those living on large acreage lots or ranches outside the City Limits, who show no indication of preferring to live in the City, those who may prefer living in town, but face housing difficulties should be identified as well as their reasons for having difficulty finding adequate housing in San Angelo.

Table 19: San Angelo LEHD Job Counts by Commute Distance, 2022

Distance Home to Work	Count	Share
Total All Jobs	39,086	100.0%
Less than 10 miles	26,626	68.1%
10 to 24 miles	780	2.0%
25 to 50 miles	610	1.6%
Greater than 50 miles	11,070	28.3%

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

Table 20 shows LEHD data for where San Angelo live outside of San Angelo.

Table 20: San Angelo LEHD Job Counts by Where Workers Work, 2022

Job Counts by Where Workers Live	Count	Share
Total All Jobs	42,698	100.0%
San Angelo, TX	25,310	59.3%
Abilene, TX	760	1.8%
Grape Creek, TX	737	1.7%
San Antonio, TX	546	1.3%
Midland, TX	543	1.3%
Lubbock, TX	400	0.9%
Odessa, TX	301	0.7%
Big Spring, TX	272	0.6%
Austin, TX	245	0.6%
Ballinger, TX	212	0.5%
All Other Locations	13,372	31.3%

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

TOM GREEN COUNTY EMPLOYMENT DATA AND TRENDS

CDS analyzed 10 years of employment data from the Quarterly Census of Employment and Wages (QCEW), focusing on yearly averages for Q2 from 2015 to 2024.

As of Q2 2024, San Angelo's employment comprised about 90% (43,000) of Tom Green County's total jobs (48,000) according to 2022 estimates.

This section evaluates employment trends by industry using the North American Industry Classification System (NAICS) codes, sorted from largest to smallest sectors unless noted otherwise.

Employment figures reflect jobs physically located in the county rather than individual worker residency. This distinction is important as about 40% (17,000) of San Angelo workers commute from outside the city.

With over 40,000 jobs in key industries like Health Care and Social Assistance, Retail Trade, Accommodation and Food Services, Educational Services, Manufacturing, and Construction, ongoing job growth will continue influencing housing and economic development trends.

Table 21 shows establishments by industry in Tom Green County from 2015 to 2024.

Table 21: Establishments by Industry – Q2 Average – Tom Green County

Industry Code	Industry	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
11	Agriculture, Forestry, Fishing and Hunting	105	110	103	106	108	109	109	112	113	114
21	Mining, Quarrying, and Oil and Gas Extraction	100	91	78	74	75	74	78	81	84	85
23	Construction	289	303	305	318	313	316	322	324	330	322
31-33	Manufacturing	103	103	100	104	105	104	107	108	113	110
22	Utilities	17	17	15	18	17	15	16	17	18	16
42	Wholesale Trade	144	136	140	139	139	146	146	144	143	138
44-45	Retail Trade	414	410	397	379	372	379	382	386	390	416
48-49	Transportation and Warehousing	94	94	95	96	98	98	95	93	88	88
51	Information	36	38	35	33	32	35	35	39	44	42
52	Finance and Insurance	185	184	191	187	185	182	188	194	184	189
53	Real Estate and Rental and Leasing	138	146	138	151	155	160	153	161	160	164
54	Professional, Scientific, and Technical Services	232	233	236	235	245	261	264	270	269	254
55	Management of Companies and Enterprises	8	8	9	10	10	10	12	13	10	8
56	Administrative and Support and Waste Management and Remediation Services	127	123	128	133	138	143	154	161	164	161
61	Educational Services	30	27	28	28	31	31	33	36	36	34
62	Health Care and Social Assistance	254	256	246	239	246	255	246	270	273	275
71	Arts, Entertainment, and Recreation	40	38	36	40	41	47	48	50	51	49
72	Accommodation and Food Services	234	242	254	256	262	265	274	288	283	291
81	Other Services (except Public Administration)	334	319	305	299	301	298	288	288	293	278
92	Public Administration	72	73	72	71	71	70	69	69	67	66
99	Unclassified	5	5	14	17	9	12	12	14	20	13
	Total, All Industries	2,961	2,956	2,925	2,933	2,953	3,010	3,031	3,118	3,133	3,113

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

Table 22 shows the average weekly wage by industry and total for all industries in Tom Green County from 2015 to 2024.

The average weekly wage in 2024 for Tom Green County was \$1,039, an equivalent of about \$54,000 a year.

Table 22: Average Weekly Wages by Industry – Q2 Average – Tom Green County

Industry Code	Industry	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
21	Agriculture, Forestry, Fishing and Hunting	\$605	\$607	\$601	\$642	\$666	\$713	\$634	\$639	\$678	\$739
22	Mining, Quarrying, and Oil and Gas Extraction	\$1,261	\$1,165	\$1,237	\$1,417	\$1,513	\$1,286	\$1,256	\$1,480	\$1,557	\$1,655
55	Construction	\$838	\$778	\$845	\$872	\$917	\$931	\$945	\$1,001	\$1,079	\$1,238
48-49	Manufacturing	\$1,022	\$1,094	\$1,144	\$1,188	\$1,259	\$1,333	\$1,276	\$1,291	\$1,215	\$1,289
31-33	Utilities	\$1,116	\$1,135	\$1,159	\$1,281	\$1,405	\$1,312	\$1,382	\$1,488	\$1,698	\$1,696
52	Wholesale Trade	\$900	\$844	934	1028	1017	1050	1156	1304	\$1,293	\$1,417
92	Retail Trade	\$543	\$540	\$557	\$592	\$623	\$641	\$669	\$692	\$694	\$703
62	Transportation and Warehousing	\$1,039	\$905	\$995	\$1,123	\$1,144	\$1,052	\$1,101	\$1,199	\$1,242	\$1,307
42	Information	\$863	\$821	\$852	\$896	\$910	\$1,044	\$1,082	\$1,089	\$1,042	\$1,412
23	Finance and Insurance	\$1,051	\$1,099	\$1,083	\$1,127	\$1,233	\$1,293	\$1,455	\$1,350	\$1,240	\$1,373
54	Real Estate and Rental and Leasing	\$571	\$609	\$645	\$664	\$689	\$786	\$849	\$888	\$1,012	\$1,091
51	Professional, Scientific, and Technical Services	\$859	\$818	\$877	\$908	\$966	\$977	\$1,018	\$1,199	\$1,231	\$1,392
61	Management of Companies and Enterprises	\$1,047	\$1,179	\$1,115	\$1,321	\$1,210	\$1,379	\$1,310	\$1,799	\$1,688	\$2,192
11	Administrative and Support and Waste Management and Remediation Services	\$586	\$609	\$627	\$651	\$621	\$643	\$685	\$810	\$874	\$915
99	Educational Services	\$688	\$698	\$711	714	\$739	\$814	\$808	\$836	\$837	\$844
53	Health Care and Social Assistance	\$794	\$853	\$929	\$975	\$1,040	\$1,026	\$1,140	\$1,185	\$1,195	\$1,236
56	Arts, Entertainment, and Recreation	\$346	\$348	\$342	\$371	\$367	\$422	\$398	\$429	\$483	\$505
81	Accommodation and Food Services	\$314	\$312	\$315	\$319	\$355	\$356	\$369	\$383	\$394	\$417
44-45	Other Services (except Public Administration)	\$532	\$550	\$543	\$592	\$607	\$727	\$758	\$849	\$894	\$750
71	Public Administration	\$955	\$968	\$1,047	\$1,019	\$1,038	\$1,118	\$1,179	\$1,258	\$1,336	\$1,457
72	Unclassified	\$709	\$317	\$379	\$565	\$663	\$317	\$263	\$607	\$674	\$785
10	Total, All Industries	\$733	\$733	\$772	\$814	\$852	\$883	\$909	\$961	\$977	\$1,039

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

Table 23 shows employment by industry in Tom Green County from 2015 to 2024.

In 2024 there were an estimated 50,000 jobs in To Green County.

Table 23: Employees by Industry – Q2 Average – Tom Green County

Industry Code	Industry	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
11	Agriculture, Forestry, Fishing and Hunting	388	375	388	415	432	407	355	377	350	334
21	Mining, Quarrying, and Oil and Gas Extraction	1,542	944	998	1,150	1,314	738	771	1,018	1,160	1,219
23	Construction	2,282	2,431	2,372	2,478	2,541	2,460	2,388	2,518	2,551	2,583
31-33	Manufacturing	3,384	3,244	3,040	3,402	3,298	2,997	3,208	3,442	3,599	3,974
22	Utilities	370	370	369	333	359	344	338	411	427	435
42	Wholesale Trade	1,926	1,774	1,834	1,833	1,907	1,870	1,782	1,763	1,850	1,785
44-45	Retail Trade	6,294	6,704	6,355	6,274	6,201	5,784	6,089	6,353	6,350	6,318
48-49	Transportation and Warehousing	995	813	901	1,121	1,204	1,089	992	1,026	1,007	1,003
51	Information	838	804	745	636	634	612	639	673	655	588
52	Finance and Insurance	1,828	1,823	1,996	2,123	1,706	1,684	1,733	1,767	1,679	1,720
53	Real Estate and Rental and Leasing	619	604	563	612	701	670	652	683	647	690
54	Professional, Scientific, and Technical Services	1,347	1,340	1,361	1,460	1,534	1,689	1,744	1,867	1,838	1,887
55	Management of Companies and Enterprises	93	97	101	95	97	100	135	149	145	85
56	Administrative and Support and Waste Management and Remediation Services	2273	2155	2222	2065	2385	2090	2,523	2619	2391	2,306
61	Educational Services	4392	4528	4621	4645	4598	4330	4463	4653	4733	4930
62	Health Care and Social Assistance	9,022	8,881	8,791	8,683	8332	8265	8150	8388	8867	9461
71	Arts, Entertainment, and Recreation	669	665	701	627	646	590	796	802	794	763
72	Accommodation and Food Services	5497	5564	5741	5882	5807	4463	5359	5722	5997	5911
81	Other Services (except Public Administration)	1664	1521	1426	1424	1438	1527	1771	1879	1959	1514
92	Public Administration	2477	2570	2571	2673	2781	2537	2546	2543	2557	2552
99	Unclassified	17	6	26	32	14	12	18	36	28	20
	Total, All Industries	47,917	47,213	47,122	47,963	47,929	44,258	46,452	48,689	49,584	50,078

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

Covid U.S. Employment Summary

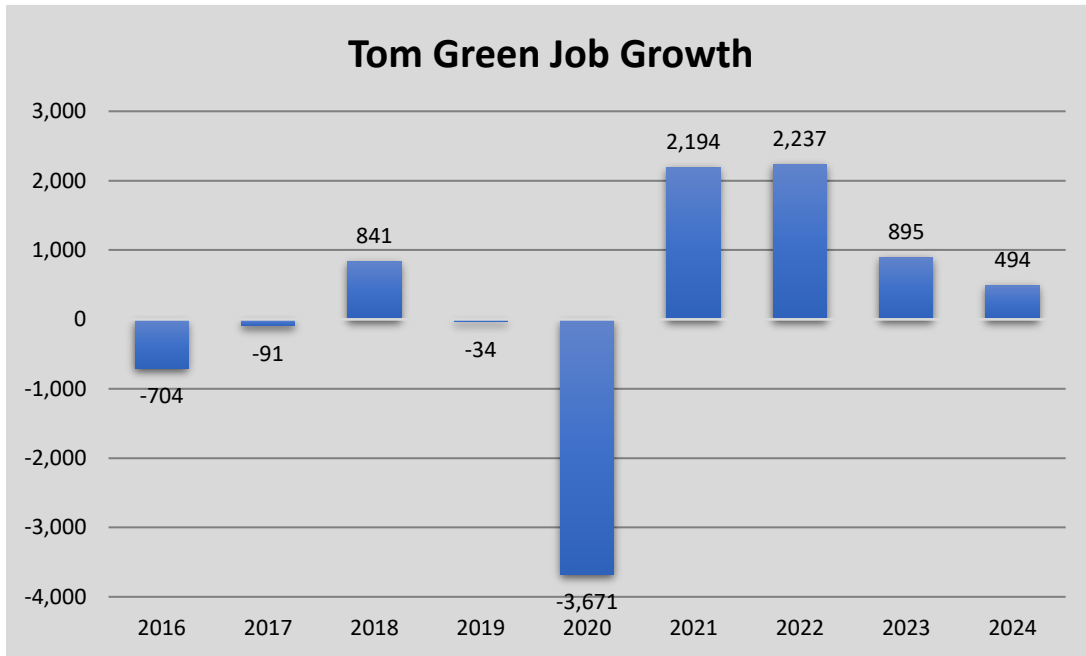
- In February 2020 U.S. employment was at a peak before the pandemic hit.
- From March to April 2020 massive job losses occurred due to lockdowns and shutdowns.
- In April 2020 alone, over 20 million jobs were lost—the sharpest drop in U.S. history.
- May 2020 to 2021 saw gradual job recovery begin as businesses reopened.
- By mid to late 2021, many jobs had returned, though recovery varied by industry (hospitality, travel, and entertainment took longer).

Tom Green County Job Growth

Figure 24 shows Tom Green County employment trends from 2016 to 2024.

The county experienced tremendous job growth coming out of COVID from 2021 to 2024.

Figure 24: Tom Green County Job Growth, 2016-2024



Source: Texas Workforce Commission Labor Market and Career Information, CDS calculations

- From 2020 to 2024 an estimated **5,820** new jobs were created, an average of 1,455 a year in that span.
- By 2022 Tom Green County employment had 48,689 jobs and surpassed 2020's total employment of 47,929.
- Job growth in 2022, 2023 and 2024 brought a new peak for employment in the County, greater any other point in the past.
- As of 2024 employment estimates show a record number of **50,000** jobs in Tom Green County.

Industry Sectors

Table 25 shows employees, share of employment and average weekly wage by industry in Tom Green County as of Q2 2024.

The five largest employment industry sectors in Tom Green County were:

- Health Care and Social Assistance
- Retail Trade
- Accommodation and Food Services
- Educational Services
- Manufacturing

Table 25: Industries Ranked by Q2 2024 Employment – Tom Green County

Rank	Industry	Employees	Share of Employment	Avg. Weekly Wage
1	Health Care and Social Assistance	9,461	18.9%	\$1,236
2	Retail Trade	6,318	12.6%	\$703
3	Accommodation and Food Services	5,911	11.8%	\$417
4	Educational Services	4,930	9.8%	\$844
5	Manufacturing	3,974	7.9%	\$1,289
6	Construction	2,583	5.2%	\$1,238
7	Public Administration	2,552	5.1%	\$1,457
8	Administrative and Support and Waste Management and Remediation Services	2,306	4.6%	\$915
9	Professional, Scientific, and Technical Services	1,887	3.8%	\$1,392
10	Wholesale Trade	1,785	3.6%	\$1,417
11	Finance and Insurance	1,720	3.4%	\$1,373
12	Other Services (except Public Administration)	1,514	3.0%	\$750
13	Mining, Quarrying, and Oil and Gas Extraction	1,219	2.4%	\$1,655
14	Transportation and Warehousing	1,003	2.0%	\$1,307
15	Arts, Entertainment, and Recreation	763	1.5%	\$505
16	Real Estate and Rental and Leasing	690	1.4%	\$1,091
17	Information	588	1.2%	\$1,412
18	Utilities	435	0.9%	\$1,696
19	Agriculture, Forestry, Fishing and Hunting	334	0.7%	\$739
20	Management of Companies and Enterprises	85	0.2%	\$2,192
21	Unclassified	20	0.0%	\$785
Total, All Industries		50,078	100%	\$1,039

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

Table 26 illustrates employment growth and change by industry sector over the periods covering the last 3, 5, and 10 year periods.

Since 2022 the largest numbers of employees were added in:

- Health Care and Social Assistance, Manufacturing, Educational Services, Mining, Quarrying, and Oil and Gas Extraction, Accommodation and Food Services.

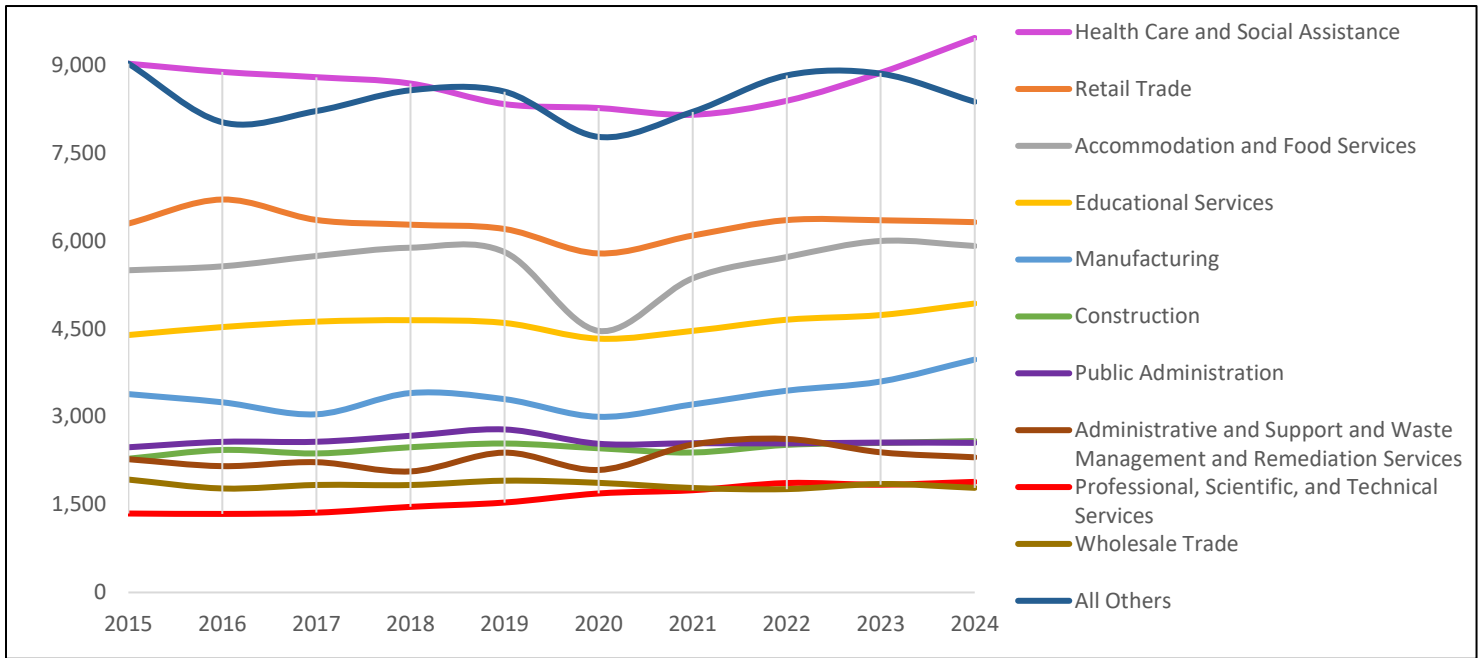
Table 26: Employment Growth by Industry – Tom Green County

In Order of 2022-2024 Largest Growth Rate

Industry	Total Growth			Growth Rate		
	2022-2024	2020-2024	2015-2024	2022-2024	2020-2024	2015-2024
Health Care and Social Assistance	1,073	1,196	439	13%	14%	5%
Manufacturing	532	977	590	15%	33%	17%
Educational Services	277	600	538	6%	14%	12%
Mining, Quarrying, and Oil and Gas Extraction	201	481	-323	20%	65%	-21%
Accommodation and Food Services	189	1,448	414	3%	32%	8%
Construction	65	123	301	3%	5%	13%
Utilities	24	91	65	6%	26%	18%
Wholesale Trade	22	-85	-141	1%	-5%	-7%
Professional, Scientific, and Technical Services	20	198	540	1%	12%	40%
Public Administration	9	15	75	0%	1%	3%
Real Estate and Rental and Leasing	7	20	71	1%	3%	11%
Unclassified	-16	8	3	-44%	67%	18%
Transportation and Warehousing	-23	-86	8	-2%	-8%	1%
Retail Trade	-35	534	24	-1%	9%	0%
Arts, Entertainment, and Recreation	-39	173	94	-5%	29%	14%
Agriculture, Forestry, Fishing and Hunting	-43	-73	-54	-11%	-18%	-14%
Finance and Insurance	-47	36	-108	-3%	2%	-6%
Management of Companies and Enterprises	-64	-15	-8	-43%	-15%	-9%
Information	-85	-24	-250	-13%	-4%	-30%
Administrative and Support and Waste Management and Remediation Services	-313	216	33	-12%	10%	1%
Other Services (except Public Administration)	-365	-13	-150	-19%	-1%	-9%
Total, all industries	1,349	1,595	4,914	3%	3%	11%

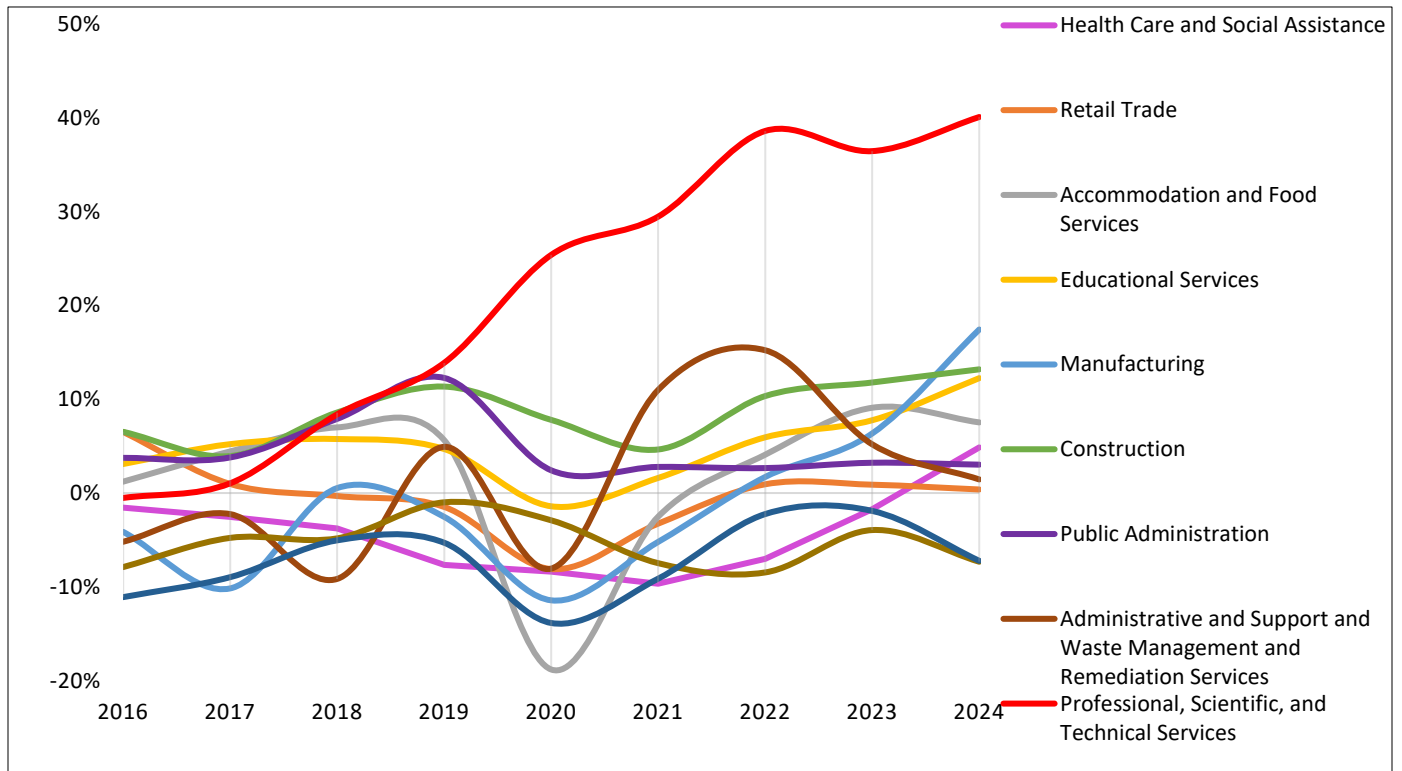
Source: Texas Workforce Commission Quarterly Census of Employment and Wages (QCEW)

Figure 27: Total Employment Growth in Top Ten Industries – Tom Green County



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

Figure 28: Cumulative Employment Growth Rate in Top Ten Industries – Tom Green County



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

Table 29 shows shifts in the share of employment of each industry in the county.

The orange cells indicate the greatest decrease in industry share of employment, green cells indicate the greatest increase in share of employment.

Professional, Scientific, and Technical Services, Manufacturing and Educational Services have increased the most in share of employment since 2015.

This is indicative of growth in those sectors like medical and industrial manufacturing businesses as well as employment at Angelo State University and other private education services.

It should be noted that three of the largest employment sectors, Retail, Accommodation and Food, and Education, pay below the average weekly wage in the county.

Table 29: Employment by Industry Share of Total Employment – Tom Green County

In Order of 2024 Largest to Smallest

Industry	2024	2022	2020	2015	2015-2024 Change
Health Care and Social Assistance	18.89%	17.23%	18.67%	18.83%	0.06%
Retail Trade	12.62%	13.05%	13.07%	13.14%	-0.52%
Accommodation and Food Services	11.80%	11.75%	10.08%	11.47%	0.33%
Educational Services	9.84%	9.56%	9.78%	9.17%	0.68%
Manufacturing	7.94%	7.07%	6.77%	7.06%	0.87%
Construction	5.16%	5.17%	5.56%	4.76%	0.40%
Public Administration	5.10%	5.22%	5.73%	5.17%	-0.07%
Administrative and Support and Waste Management and Remediation Services	4.60%	5.38%	4.72%	4.74%	-0.14%
Professional, Scientific, and Technical Services	3.77%	3.83%	3.82%	2.81%	0.96%
Wholesale Trade	3.56%	3.62%	4.23%	4.02%	-0.46%
Finance and Insurance	3.43%	3.63%	3.80%	3.81%	-0.38%
Other Services (except Public Administration)	3.02%	3.86%	3.45%	3.47%	-0.45%
Mining, Quarrying, and Oil and Gas Extraction	2.43%	2.09%	1.67%	3.22%	-0.78%
Transportation and Warehousing	2.00%	2.11%	2.46%	2.08%	-0.07%
Arts, Entertainment, and Recreation	1.52%	1.65%	1.33%	1.40%	0.13%
Real Estate and Rental and Leasing	1.38%	1.40%	1.51%	1.29%	0.09%
Information	1.17%	1.38%	1.38%	1.75%	-0.57%
Utilities	0.87%	0.84%	0.78%	0.77%	0.10%
Agriculture, Forestry, Fishing and Hunting	0.67%	0.77%	0.92%	0.81%	-0.14%
Management of Companies and Enterprises	0.17%	0.31%	0.23%	0.19%	-0.02%
Unclassified	0.04%	0.07%	0.03%	0.04%	0.00%

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

Wage Profile and Projected Growth

Table 30 shows industries in Tom Green County Ranked by 2024 average weekly wage and

Impressively, thirteen industries representing 56% of employees in Tom Green County paid an average of more than \$1,000 per week.

Table 30: Industries Ranked by 2024 Average Weekly Wage – Tom Green County

Rank	Industry	Wage	Employees	Establishments
1	Management of Companies and Enterprises	\$2,192	85	8
2	Utilities	\$1,696	435	16
3	Mining, Quarrying, and Oil and Gas Extraction	\$1,655	1219	85
4	Public Administration	\$1,457	2,552	66
5	Wholesale Trade	\$1,417	1,785	138
6	Information	\$1,412	588	42
7	Professional, Scientific, and Technical Services	\$1,392	1,887	254
8	Finance and Insurance	\$1,373	1,720	189
9	Transportation and Warehousing	\$1,307	1,003	88
10	Manufacturing	\$1,289	3,974	110
11	Construction	\$1,238	2,583	322
12	Health Care and Social Assistance	\$1,236	9461	275
13	Real Estate and Rental and Leasing	\$1,091	690	164
14	Administrative and Support and Waste Management and Remediation Services	\$915	2306	161
15	Educational Services	\$844	4930	34
16	Unclassified	\$785	20	13
17	Other Services (except Public Administration)	\$750	1,514	278
18	Agriculture, Forestry, Fishing and Hunting	\$739	334	114
19	Retail Trade	\$703	6,318	416
20	Arts, Entertainment, and Recreation	\$505	763	49
21	Accommodation and Food Services	\$417	5,911	291
	Total, all industries	\$1,039	50,078	3,113

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

Table 31 shows weekly wage growth by industry from 2015 to 2024.

Only manufacturing and Other Services saw flat or decrease in average weekly wage.

Table 31: Average Weekly Wage Growth by Industry – Tom Green County

In Order of 2015-2024 Total Growth Largest to Smallest

Industry	Total Growth			Growth Rate		
	2022-2024	2020-2024	2015-2024	2022-2024	2020-2024	2015-2024
Management of Companies and Enterprises	\$393	\$813	\$1,145	22%	59%	109%
Utilities	\$208	\$384	\$580	14%	29%	52%
Information	\$323	\$368	\$549	30%	35%	64%
Professional, Scientific, and Technical Services	\$193	\$415	\$533	16%	42%	62%
Real Estate and Rental and Leasing	\$203	\$305	\$520	23%	39%	91%
Wholesale Trade	\$113	\$367	\$517	9%	35%	57%
Public Administration	\$199	\$339	\$502	16%	30%	53%
Health Care and Social Assistance	\$51	\$210	\$442	4%	20%	56%
Construction	\$237	\$307	\$400	24%	33%	48%
Mining, Quarrying, and Oil and Gas Extraction	\$175	\$369	\$394	12%	29%	31%
Administrative and Support and Waste Management and Remediation Services	\$105	\$272	\$329	13%	42%	56%
Finance and Insurance	\$23	\$80	\$322	2%	6%	31%
Transportation and Warehousing	\$108	\$255	\$268	9%	24%	26%
Manufacturing	(\$2)	(\$44)	\$267	0%	-3%	26%
Other Services (except Public Administration)	(\$99)	\$23	\$218	-12%	3%	41%
Retail Trade	\$11	\$62	\$160	2%	10%	29%
Arts, Entertainment, and Recreation	\$76	\$83	\$159	18%	20%	46%
Educational Services	\$8	\$30	\$156	1%	4%	23%
Agriculture, Forestry, Fishing and Hunting	\$100	\$26	\$134	16%	4%	22%
Accommodation and Food Services	\$34	\$61	\$103	9%	17%	33%
Unclassified	\$178	\$468	\$76	29%	148%	11%
Total, all industries	\$78	\$157	\$306	8%	18%	42%

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

San Angelo and Tom Green Economic Summary

According to data from the San Angelo Chamber of Commerce Economic Development for Q4 2024

“The local labor market continued its positive trajectory, marked by an expanding labor force and a further decline in the unemployment rate to 3.2%, alongside significant average weekly earnings growth (10.7% year-over-year). The manufacturing sector experienced a strong resurgence in job creation and a substantial increase in sales tax revenue (48.6% quarterly, 31.4% annually), highlighting its growing economic contribution. The housing market is undergoing a period of adjustment, evidenced by moderating average and median home prices and a gradual increase in market time and inventory, influenced by rising mortgage rates. While hotel occupancy experienced a decrease, this presents an opportunity to strategically evaluate and enhance the local tourism and hospitality sector through focused initiatives aimed at attracting events and promoting San Angelo's unique offerings and amenities. Overall, San Angelo's diverse economy demonstrates considerable resilience and presents promising avenues for targeted economic development across key sectors.”

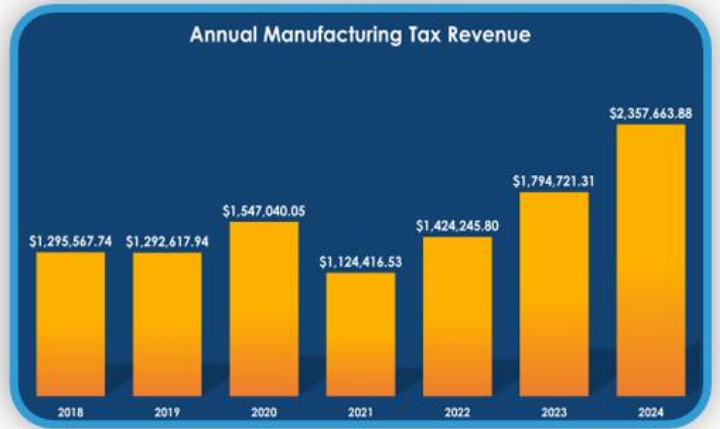
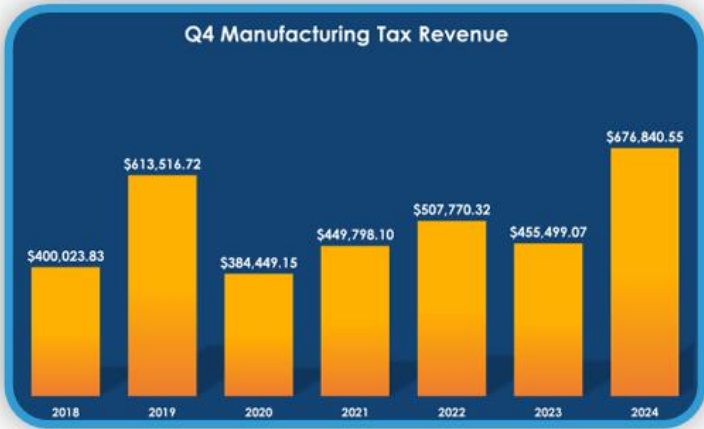
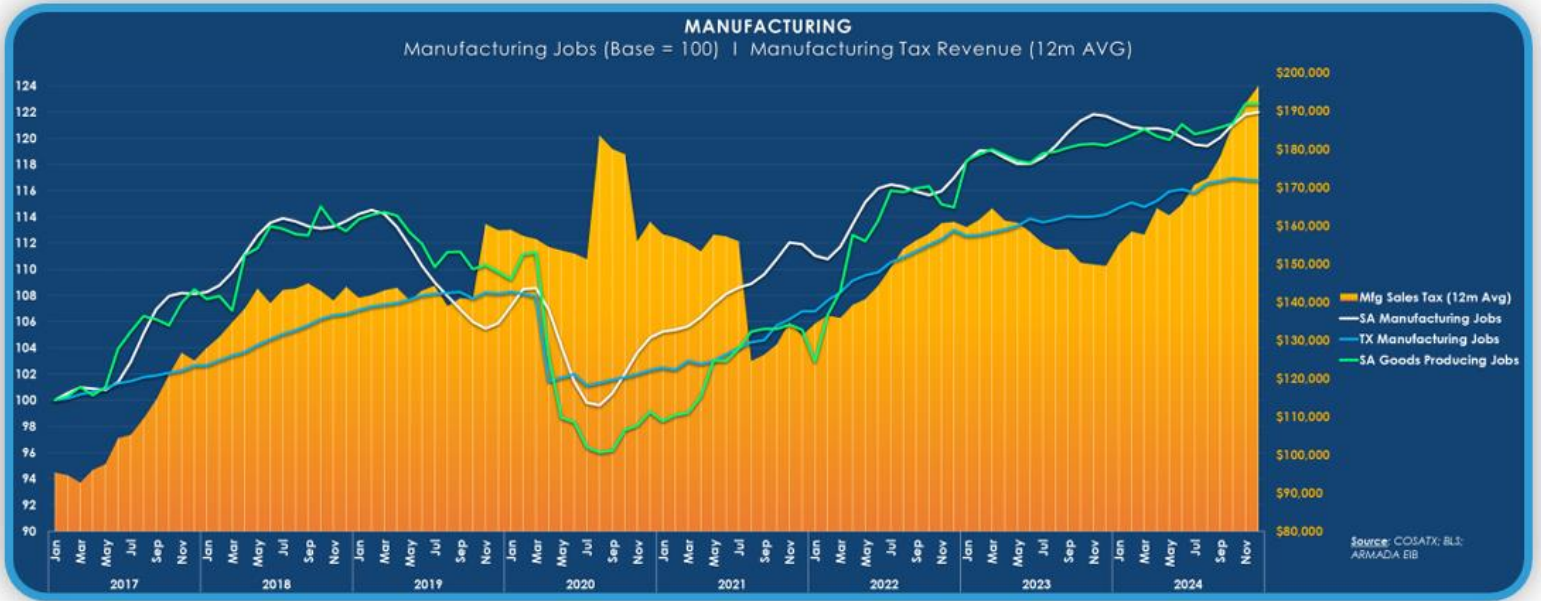
Manufacturing Jobs

“Our manufacturing sector added 59 jobs to their payroll over 4Q2024, following a 16 job reduction over Q3, residing at 3,722 jobs. While representing a relatively small portion of the total workforce (6.3%), manufacturing jobs often have a significant multiplier effect on other parts of the economy. Total Goods Producing jobs added 117 jobs, following a 22-job decrease over Q3, which indicates a broader positive trend in the local industrial segment. Manufacturing tax revenue saw a 48.6% jump in 4Q2024 compared to the same quarter in 2023, and a remarkable 31.4% increase for the entire year of 2024 (reaching a 7-year high), strongly suggesting a significant upswing in manufacturing output and sales activity. This sector is not only maintaining jobs but is also experiencing considerable growth in its business activity.”

Outlook

“The addition of jobs in manufacturing highlights the need for a skilled workforce in this sector and that educational programs need to be aligned with the needs of manufacturing employers to ensure a sustainable pipeline. The surge in sales tax revenue could potentially lead to further capital investment in equipment, technology, and expansion of facilities.”

Figure 32: San Angelo Manufacturing Jobs and Tax Revenue



Source: San Angelo Chamber of Commerce Economic Development

San Angelo Employment Projections

From 2021 to 2024 there was an average of 1,455 new jobs per year.

CDS estimates that employment in Tom Green County could increase by **2,500 to 5,000** total new jobs from **2025 to 2030**.

CDS estimates three scenarios to project future housing demand based on recent job growth utilizing the 1 new housing permit per 2 new jobs:

- Conservative – **2,500** new jobs per year
 - 2,500 total new jobs 2025-2030 = 1,250 housing units
- Average – **3,500** new jobs per year
 - 3,500 total new jobs 2025-2030 = 1,750 new housing units
- Aggressive – **5,000** new jobs per year
 - 5,000 total new jobs 2025-2030 = 2,500 new housing units
- San Angelo employers such as Shannon Health System, Goodfellow Air Force Base, San Angelo ISD, Angelo State University and industrial manufacturing business are those with the greatest employment and make up the bulk existing job growth and incoming businesses.
- A potential business prospect has indicated the possibility of opening a location in San Angelo that would employ somewhere in the range of 500 to 600 new positions.
- New job growth in San Angelo will increase housing demand primarily in the rental market and secondly in the entry level and mid-move up single-family market.
- The greatest need for new housing development in San Angelo is entry level single-family homes priced \$175,000 - \$225,000 and market rate rental units priced \$875 - \$1,300. San Angelo's current median home price is \$240,000 and average apartment rent is \$1,035 per month.
- Field interviews with local employers in Health Care and Social Assistance, Educational Services, Retail Trade and Public Administration revealed that a lack of housing (for-sale and rental) affordable and attractive to most hourly as well as moderate to higher paid workers was a challenge to attracting and hiring needed workers.
- Feedback indicated that in prior years new workers across the entire pay spectrum typically rented initially when moving to the area and then took time to decide on purchasing a home.
- Due to rising rental prices and a shrinking supply of lower priced entry level existing homes in recent years many moderate to higher paid workers go straight to purchasing and skip renting entirely.

SAN ANGELO HOUSING CHARACTERISTICS AND TRENDS

The following three tables present information regarding the housing characteristics and trends in San Angelo and Tom Green County.

The majority of this information is derived from Environics 2024 which bases current estimates on past trends from 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 in this section 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.

Table 33 shows the type and number of housing units in San Angelo and Tom Green County.

- 70% of San Angelo’s housing units were single-family detached homes.
- 20% of San Angelo’s housing units were 3 to 50 units.
- About 60% of San Angelo’s housing units were owner occupied and 40% were renter occupied.

Table 33: Housing Type Trends, 2024

Housing Type	San Angelo		Tom Green County	
	Count	%	Count	%
1 Unit Detached	30,604	70.2%	36,833	70.9%
1 Unit Attached	1,373	3.2%	1,603	3.1%
2 Units	605	1.4%	624	1.2%
3 or 4 Units	1,531	3.5%	1,549	3.0%
5 to 19 Units	2,841	6.5%	2,885	5.6%
20 to 49 Units	1,942	4.5%	1,953	3.8%
50 or More Units	3,109	7.1%	3,133	6.0%
Mobile Home or Trailer	1,531	3.5%	3,230	6.2%
Boat, RV, Van, etc.	62	0.1%	113	0.2%
Total Units	43,598		51,923	
Owner Occupied Units	23,041	58.6%	29,283	62.5%
Renter Occupied Units	16,290	41.4%	17,533	37.5%
Total Occupied Units	39,331	90.2%	46,816	90.2%
Unoccupied Units	4,267	9.8%	5,107	9.8%

Sources: Environics 2024

Table 34 contains the 2024 estimate of the age of the existing housing stock in San Angelo and Tom Green County.

Table 34: Age of Existing Housing Stock, 2024

	San Angelo		Tom Green County	
	Count	%	Count	%
Total Housing Units	43,598		51,923	
Built 2020 or Later	588	1.4%	849	1.6%
Built 2010 to 2020	3,141	7.2%	4,352	8.4%
Built 2000 to 2009	4,027	9.2%	5,163	9.9%
Built 1990 to 1999	3,859	8.9%	5,282	10.2%
Built 1980 to 1989	7,427	17.0%	8,789	16.9%
Built 1970 to 1979	7,219	16.6%	8,584	16.5%
Built 1960 to 1969	5,339	12.3%	5,872	11.3%
Built 1950 to 1959	7,683	17.6%	8,044	15.5%
Built 1940 to 1949	1,956	4.5%	2,169	4.2%
Built 1939 or Earlier	2,359	5.4%	2,819	5.4%
Dominant Year Structure Built				
	1980 to 1989		1980 to 1989	

Sources: Environics 2024

Housing Value Trends

Table 35 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 can provide an estimate of the value of owner-occupied units.

Table 35: San Angelo Housing Value, 2024

Housing Value Range	San Angelo		Tom Green County	
	Count	Share	Count	Share
2024 Est. Owner Occupied Housing Units by Value	23,041		29,283	
Value Less than \$20,000	580	2.5%	769	2.6%
Value \$20,000 to \$39,999	529	2.3%	707	2.4%
Value \$40,000 to \$59,999	914	4.0%	1,062	3.6%
Value \$60,000 to \$79,999	1,221	5.3%	1,423	4.9%
Value \$80,000 to \$99,999	1,639	7.1%	1,994	6.8%
Value \$100,000 to \$149,999	3,555	15.4%	4,221	14.4%
Value \$150,000 to \$199,999	4,133	17.9%	5,017	17.1%
Value \$200,000 to \$299,999	6,360	27.6%	7,959	27.2%
Value \$300,000 to \$399,999	1,630	7.1%	2,416	8.3%
Value \$400,000 to \$499,999	991	4.3%	1,586	5.4%
Value \$500,000 to \$749,999	846	3.7%	1,174	4.0%
Value \$750,000 to \$999,999	297	1.3%	429	1.5%
Value \$1,000,000 to \$1,499,999	212	0.9%	315	1.1%
Value \$1,500,000 to \$1,999,999	105	0.5%	136	0.5%
Value \$2,000,000 or more	29	0.1%	75	0.3%
2024 Est. Median Owner-Occupied Housing Unit Value		\$187,019		\$194,363

Source: PCensus 2024

Overall Household Income Profiles

Table 36 shows median household income as well as the number and share of owner and renter households by income.

- Median household income in San Angelo was \$64,146
- Owner-occupied households have a significantly higher median income (\$80,122) compared to renters (\$44,298), highlighting a stark income gap.
- Over 44% of renter households earn less than \$50,000 annually, compared to just 34% of owners, indicating more cost burdened vulnerability among renters.

Table 36: 2023 Household Income by Tenure

	San Angelo		Tom Green	
	Count	Share	Count	Share
Total Households	38,833		46,094	
Median Income	\$52,048		\$66,254	
Owner-Occupied	24,600		30,807	
Less than \$25,000	2,913	13.8%	3,545	12.6%
\$25,000 to \$49,999	4,269	20.2%	5,472	19.5%
\$50,000 to \$74,999	4,198	19.9%	5,158	18.4%
\$75,000 to \$99,999	4,027	19.1%	4,914	17.5%
\$100,000 to \$149,999	5,258	24.9%	6,359	22.7%
\$150,000 or more	3,935	18.6%	5,359	19.1%
Median Income	\$80,122		\$81,223	
Renter-Occupied	14,233		15,287	
Less than \$25,000	3,896	21.5%	3,999	20.4%
\$25,000 to \$49,999	4,071	22.5%	4,465	22.8%
\$50,000 to \$74,999	2,754	15.2%	3,048	15.6%
\$75,000 to \$99,999	1,778	9.8%	1,850	9.4%
\$100,000 to \$149,999	1,294	7.1%	1,375	7.0%
\$150,000 or more	440	2.4%	550	2.8%
Median Income	\$44,298		\$44,708	

Source: US Census Bureau American Community Survey 2023 5-Year Estimates

Table 37 shows household income by age of householder.

- The youngest (under 25) and oldest (65+) residents have the highest shares of households earning less than \$25,000, at 35.5% and 26.1% respectively, showing greater housing affordability stress for these age groups.
- Peak earning ages (25–64) show more income diversity, but still include substantial shares earning under \$50,000.

Table 37: 2023 Household Income by Age of Householder

	San Angelo		Tom Green County	
	Count	Share	Count	Share
Total Households	38,833		46,094	
Median Income	\$64,146		\$66,254	
Under 25 Years	2,394		2,553	
Less than \$25,000	851	35.5%	851	33.3%
\$25,000 to \$49,999	795	33.2%	843	33.0%
\$50,000 to \$74,999	300	12.5%	300	11.8%
\$75,000 to \$99,999	251	10.5%	251	9.8%
\$100,000 to \$149,999	197	8.2%	210	8.2%
\$150,000 or more	0	0.0%	0	0.0%
25-44 Years	14,482		16,540	
Less than \$25,000	1,418	9.8%	1,519	9.2%
\$25,000 to \$49,999	2,928	20.2%	3,361	20.3%
\$50,000 to \$74,999	3,010	20.8%	3,425	20.7%
\$75,000 to \$99,999	2,596	17.9%	2,822	17.1%
\$100,000 to \$149,999	3,070	21.2%	3,374	20.4%
\$150,000 or more	1,460	10.1%	2,039	12.3%
45-64 Years	11,866		14,616	
Less than \$25,000	1,903	16.0%	2,141	14.6%
\$25,000 to \$49,999	2,245	18.9%	2,693	18.4%
\$50,000 to \$74,999	1,941	16.4%	2,354	16.1%
\$75,000 to \$99,999	1,547	13.0%	1,957	13.4%
\$100,000 to \$149,999	2,264	19.1%	2,778	19.0%
\$150,000 or more	1,966	16.6%	2,693	18.4%
65 Years and Older	10,091		12,385	
Less than \$25,000	2,637	26.1%	3,033	24.5%
\$25,000 to \$49,999	2,372	23.5%	3,040	24.5%
\$50,000 to \$74,999	1,701	16.9%	2,127	17.2%
\$75,000 to \$99,999	1,411	14.0%	1,636	13.2%
\$100,000 to \$149,999	1,021	10.1%	1,372	11.1%
\$150,000 or more	949	9.4%	1,177	9.5%

Source: US Census Bureau American Community Survey 2023 5-Year Estimates

Table 38 shows household income by household type.

- Family households have a higher median income (\$80,114) compared to non-family households (\$37,793), which explains greater cost burden among non-family households.
- Nearly 29% of non-family households earn less than \$25,000 versus only 10% of family households.

Table 38: 2023 Household Income by Household Type

	San Angelo		Tom Green County	
	Count	Share	Count	Share
Total Households	38,833		46,094	
Median Income	\$64,146		\$66,254	
Family Households	23,972		29,111	
Less than \$25,000	2,475	10.3%	2,214	7.6%
\$25,000 to \$49,999	5,022	20.9%	4,153	14.3%
\$50,000 to \$74,999	5,518	23.0%	4,708	16.2%
\$75,000 to \$99,999	4,535	18.9%	3,818	13.1%
\$100,000 to \$149,999	6,271	26.2%	5,248	18.0%
\$150,000 or more	5,290	22.1%	3,831	13.2%
Median Income	\$80,114		\$83,170	
Non-Family Households	14,861		16,983	
Less than \$25,000	4,914	28.8%	5,388	27.2%
\$25,000 to \$49,999	4,351	25.5%	5,091	25.7%
\$50,000 to \$74,999	2,277	13.3%	2,753	13.9%
\$75,000 to \$99,999	1,890	11.1%	2,130	10.8%
\$100,000 to \$149,999	885	5.2%	1,018	5.1%
\$150,000 or more	544	3.2%	603	3.0%
Median Income	\$37,793		\$38,763	

Source: US Census Bureau American Community Survey 2023 5-Year Estimates

Housing Cost-Burdened Households

This section provides a quantitative perspective on the share of household income spent on housing to determine potential demand for affordable housing in San Angelo.

To do this, CDS has employed a standard of housing costs not exceeding 30% of gross household income.

The ability to pay less than the 30% share of household income on housing costs indicates that residents are in housing that is affordable for their household income level.

Paying greater than 30% of household income on housing costs indicates households taking on a burdensome housing cost.

This is problematic because unavoidable life events such as transportation, health, family, natural disasters or other emergencies can quickly impact households paying 30% or more on housing costs rendering them unable to afford anything but the barest of necessities, and in some cases can result in homelessness, malnutrition and other types of hardships.

The 30% threshold is a commonly used standard in the U.S., though it not always sufficient to convey the extent to which housing costs may constitute a burden to a particular household.

Also, this measurement takes into account income per household as opposed to wages.

The data in the following tables has been sourced from U.S. Census Bureau American Community Survey 2023 5-Year Estimates, the most recent demographic data from the U.S. Census Bureau at the time of this study.

Table 39 shows housing cost burden for owners in San Angelo and Tom Green County.

- Cost burden (30%+ of income spent on housing) is highly concentrated among low-income owner households: 65% of those earning <\$20K and 50% of those earning \$20K–\$35K are burdened.
- By contrast, only 3.7% of owners earning \$75K+ are cost burdened, reflecting strong affordability at higher income levels.
- There was a total of 5,061 owners paying 30% or more on housing. This represents 20% of all owners and 13% of all households

Table 39: 2023 Housing Costs as a Percentage of Household Income – Owner-Occupied Housing by Income

	San Angelo		Tom Green County	
	Count	Share	Count	Share
Total Housing Units	38,833		46,094	
Owner-Occupied housing units	24,600		30,807	
Less than \$20,000	1,901	7.7%	2,297	7.5%
Less than 20 percent	316	16.6%	454	19.8%
20 to 29 percent	352	18.5%	403	17.5%
30 percent or more	1,233	64.9%	1,440	62.7%
\$20,000 to \$34,999	2,582	10.5%	3,217	10.4%
Less than 20 percent	698	27.0%	948	29.5%
20 to 29 percent	585	22.7%	693	21.5%
30 percent or more	1,299	50.3%	1,576	49.0%
\$35,000 to \$49,999	2,477	10.1%	3,224	10.5%
Less than 20 percent	1,233	49.8%	1,650	51.2%
20 to 29 percent	479	19.3%	692	21.5%
30 percent or more	765	30.9%	882	27.4%
\$50,000 to \$74,999	4,198	17.1%	5,158	16.7%
Less than 20 percent	1,887	44.9%	2,560	49.6%
20 to 29 percent	1,040	24.8%	1,193	23.1%
30 percent or more	1,271	30.3%	1,405	27.2%
\$75,000 or more	13,220	53.7%	16,632	54.0%
Less than 20 percent	10,873	82.2%	13,569	81.6%
20 to 29 percent	1,854	14.0%	2,405	14.5%
30 percent or more	493	3.7%	658	4.0%
Zero or negative income	222	0.9%	279	0.9%

Source: US Census Bureau American Community Survey 2023 5-Year Estimates

Table 40 shows housing cost burden by income for renters in San Angelo and Tom Green County.

- 94% of renters earning less than \$20,000 are housing cost burdened, with a dramatic drop as income rises.
- Only 3.3% of renters earning \$75K+ are cost burdened, indicating clear correlation between income and rent affordability.
- There was a total of 6,632 renters paying 30% or more on housing. This represents 47% of all renters and 17% of all households

Table 40: 2023 Housing Costs as a Percentage Of Household Income – Renter-Occupied Housing by Income

	San Angelo		Tom Green County	
	Count	Share	Count	Share
Total Housing Units	38,833		46,094	
Renter-Occupied housing units	14,233		15,287	
Less than \$20,000	2,550	17.9%	2,577	16.9%
Less than 20 percent	6	0.2%	6	0.2%
20 to 29 percent	148	5.8%	148	5.7%
30 percent or more	2,396	94.0%	2,423	94.0%
\$20,000 to \$34,999	2,393	16.8%	2,604	17.0%
Less than 20 percent	72	3.0%	72	2.8%
20 to 29 percent	240	10.0%	240	9.2%
30 percent or more	2,081	87.0%	2,292	88.0%
\$35,000 to \$49,999	2,323	16.3%	2,431	15.9%
Less than 20 percent	177	7.6%	177	7.3%
20 to 29 percent	788	33.9%	801	32.9%
30 percent or more	1,358	58.5%	1,453	59.8%
\$50,000 to \$74,999	2,596	18.2%	2,850	18.6%
Less than 20 percent	754	29.0%	837	29.4%
20 to 29 percent	1,157	44.6%	1,244	43.6%
30 percent or more	685	26.4%	769	27.0%
\$75,000 or more	3,417	24.0%	3,593	23.5%
Less than 20 percent	2,024	59.2%	2,166	60.3%
20 to 29 percent	1,281	37.5%	1,315	36.6%
30 percent or more	112	3.3%	112	3.1%
Zero or negative income	233	1.6%	250	1.6%
No cash rent	721	5.1%	982	6.4%

Source: US Census Bureau American Community Survey 2023 5-Year Estimates

Table 41 shows housing cost burden by tenure and age of householder.

- Young renters (15–24 mostly Angelo State Students) and seniors (65+) are highly burdened, with 56.3% and 47.4%, respectively, paying over 35% of income on rent.
- Rent burden is also significant among prime working-age adults (25–64), with more than 30% paying excessive rent relative to income.

Table 41: 2023 Housing Costs as a Percentage of Household Income – San Angelo by Age

San Angelo	Renter-Occupied		Owner-Occupied	
	Count	Share	Count	Share
Total	14,233		24,600	
Householder 15 to 24 years	2,065	14.5%	329	1.3%
Less than 20.0 percent	315	15.3%	84	25.5%
20.0 to 24.9 percent	144	7.0%	22	6.7%
25.0 to 29.9 percent	239	11.6%	10	3.0%
30.0 to 34.9 percent	109	5.3%	32	9.7%
35.0 percent or more	1,162	56.3%	181	55.0%
Not computed	96	4.6%	0	0.0%
Householder 25 to 34 years	3,670	25.8%	3,767	15.3%
Less than 20.0 percent	789	21.5%	1,962	52.1%
20.0 to 24.9 percent	678	18.5%	410	10.9%
25.0 to 29.9 percent	437	11.9%	386	10.2%
30.0 to 34.9 percent	212	5.8%	361	9.6%
35.0 percent or more	1,354	36.9%	648	17.2%
Not computed	200	5.4%	0	0.0%
Householder 35 to 64 years	5,915	41.6%	12,996	52.8%
Less than 20.0 percent	1,502	25.4%	8,178	62.9%
20.0 to 24.9 percent	778	13.2%	1,245	9.6%
25.0 to 29.9 percent	747	12.6%	997	7.7%
30.0 to 34.9 percent	631	10.7%	712	5.5%
35.0 percent or more	1,802	30.5%	1,679	12.9%
Not computed	455	7.7%	185	1.4%
Householder 65 years and over	2,583	18.1%	7,508	30.5%
Less than 20.0 percent	427	16.5%	4,783	63.7%
20.0 to 24.9 percent	242	9.4%	859	11.4%
25.0 to 29.9 percent	349	13.5%	381	5.1%
30.0 to 34.9 percent	138	5.3%	323	4.3%
35.0 percent or more	1,224	47.4%	1,125	15.0%
Not computed	203	7.9%	37	0.5%

Source: US Census Bureau American Community Survey 2023 5-Year Estimates

Owners

Table 42 shows owners and share of housing cost burden by mortgage status.

- Among mortgage holders, 27.6% are cost burdened, with 10.5% paying over 50% of income on housing—a significant financial pressure.
- For owners without a mortgage, only 13.5% are burdened, suggesting greater financial security in fully owned homes.

Table 42: 2023 Monthly Owner Costs as a Percentage Of Household Income by Mortgage Status

Owner-Occupied	San Angelo		Tom Green County	
	Count	Share	Count	Share
Total	24,600		30,807	
Housing units with a mortgage	12,353	50.2%	14,945	48.5%
Less than 10.0 percent	774	6.3%	979	6.6%
10.0 to 14.9 percent	2,338	18.9%	2,701	18.1%
15.0 to 19.9 percent	2,839	23.0%	3,576	23.9%
20.0 to 24.9 percent	1,582	12.8%	1,943	13.0%
25.0 to 29.9 percent	1,302	10.5%	1,624	10.9%
30.0 to 34.9 percent	766	6.2%	940	6.3%
35.0 to 39.9 percent	513	4.2%	604	4.0%
40.0 to 49.9 percent	823	6.7%	909	6.1%
50.0 percent or more	1,302	10.5%	1,555	10.4%
Not computed	114	0.9%	114	0.8%
30.0 percent or more	3,404	27.6%	4,008	26.8%
Housing units without a mortgage	12,247	49.8%	15,862	51.5%
Less than 10.0 percent	5,155	42.1%	6,829	43.1%
10.0 to 14.9 percent	2,342	19.1%	3,100	19.5%
15.0 to 19.9 percent	1,559	12.7%	1,996	12.6%
20.0 to 24.9 percent	954	7.8%	1,230	7.8%
25.0 to 29.9 percent	472	3.9%	589	3.7%
30.0 to 34.9 percent	662	5.4%	708	4.5%
35.0 to 39.9 percent	170	1.4%	225	1.4%
40.0 to 49.9 percent	255	2.1%	301	1.9%
50.0 percent or more	570	4.7%	719	4.5%
Not computed	108	0.9%	165	1.0%
30.0 percent or more	1,657	13.5%	1,953	12.3%

Source: US Census Bureau American Community Survey 2023 5-Year Estimates

Table 43 shows cost burden in San Angelo home owners by age.

- 64.7% of owners under age 25 are cost burdened—the highest rate among all age groups.
- Owners aged 35–64 have the lowest burden rate (18.4%), while seniors (65+) are burdened at nearly 1 in 5.

Table 43: 2023 Cost-Burdened Owner Households by Age - San Angelo

Owner-Occupied	San Angelo	
	Count	Share
Total	24,600	
Total In Age Range		
Householder 15 to 24 years	329	1.3%
Householder 25 to 34 years	3,767	15.3%
Householder 35 to 64 years	12,996	52.8%
Householder 65 years and over	7,508	30.5%
30% or more of Income	5,061	20.6%
Householder 15 to 24 years	213	64.7%
Householder 25 to 34 years	1,009	26.8%
Householder 35 to 64 years	2,391	18.4%
Householder 65 years and over	1,448	19.3%

Source: US Census Bureau American Community Survey 2023 5-Year Estimates

Table 44 shows cost burden in owners by income.

- Cost burden sharply declines with rising income: 61.5% of households earning less than \$10K are burdened vs. only 1.8% of those earning \$100K+.
- Households earning under \$50K face the highest burden risk, especially those below \$35K, where more than half are cost burdened.

Table 44: 2023 Cost-Burdened Owner Households by Income - San Angelo

Owner-Occupied	San Angelo	
	County	Share
Total	24,600	
Total In Income Range		
Less than \$10,000	577	2.3%
\$10,000 to \$19,999	1,546	6.3%
\$20,000 to \$34,999	2,582	10.5%
\$35,000 to \$49,999	2,477	10.1%
\$50,000 to \$74,999	4,198	17.1%
\$75,000 to \$99,999	4,027	16.4%
\$100,000 or more	9,193	37.4%
30% or more of Income	5,061	20.6%
Less than \$10,000	355	61.5%
\$10,000 to \$19,999	878	56.8%
\$20,000 to \$34,999	1,299	50.3%
\$35,000 to \$49,999	765	30.9%
\$50,000 to \$74,999	1,271	30.3%
\$75,000 to \$99,999	325	8.1%
\$100,000 or more	168	1.8%

Source: US Census Bureau American Community Survey 2023 5-Year Estimates

Renters

Table 45 shows rent as a percentage of income.

- Nearly half (46.6%) of renter households in San Angelo are cost burdened, paying 30% or more of income on rent.
- The median rent-to-income ratio is 33.1%, indicating that the typical renter is on the edge of affordability standards.

Table 45: 2023 Gross Rent as a Percentage Of Household Income

	San Angelo		Tom Green	
	Count	Share	Count	Share
Total	14,233		15,287	
Less than 10.0 percent	375	2.6%	413	2.7%
10.0 to 14.9 percent	1,243	8.7%	1,313	8.6%
15.0 to 19.9 percent	1,415	9.9%	1,532	10.0%
20.0 to 24.9 percent	1,842	12.9%	1,958	12.8%
25.0 to 29.9 percent	1,772	12.4%	1,790	11.7%
30.0 to 34.9 percent	1,090	7.7%	1,178	7.7%
35.0 to 39.9 percent	1,176	8.3%	1,263	8.3%
40.0 to 49.9 percent	1,443	10.1%	1,575	10.3%
50.0 percent or more	2,923	20.5%	3,033	19.8%
Not computed	954	6.7%	1,232	8.1%
30.0 percent or more	6,632	46.6%	7,049	46.1%
Median gross rent as a percentage of household income	33.10%		33.90%	

Source: US Census Bureau American Community Survey 2023 5-Year Estimates

Table 46 shows renter households by age and cost burden.

- The majority of rent-burdened households are in the 25–64 age range, but young adults and seniors still face high levels of rent stress.
- Over 1 in 5 renters under 25 and over 65 pay more than 30% of their income on rent.

Table 46: 2023 Monthly Renter Costs by Household Income and Age

Renter-Occupied	San Angelo	
	Count	Share
Total	14,233	
Total In Age Range		
Householder 15 to 24 years	2,065	14.5%
Householder 25 to 34 years	3,670	25.8%
Householder 35 to 64 years	5,915	41.6%
Householder 65 years and over	2,583	18.1%
30% or more of Income	6,632	47%
Householder 15 to 24 years	1,271	19.2%
Householder 25 to 34 years	1,566	23.6%
Householder 35 to 64 years	2,433	36.7%
Householder 65 years and over	1,362	20.5%

Source: US Census Bureau American Community Survey 2023 5-Year Estimates

Table 47 shows renter households by income and cost burden.

- Rent burden is almost universal among low-income renters: over 84% of those earning less than \$20K are cost burdened.
- Households earning more than \$75K show minimal burden, highlighting the critical affordability gap at lower income levels.

Table 47: 2023 Monthly Renter Costs by Household Income

Renter-Occupied	San Angelo	
	Count	Share
Total	14,233	
Total In Income Range		
Less than \$10,000	1,275	9.0%
\$10,000 to \$19,999	1,776	12.5%
\$20,000 to \$34,999	2,440	17.1%
\$35,000 to \$49,999	2,476	17.4%
\$50,000 to \$74,999	2,754	19.3%
\$75,000 to \$99,999	1,778	12.5%
\$100,000 or more	1,734	12.2%
30% or more of Income	46.6%	
Less than \$10,000	893	70.0%
\$10,000 to \$19,999	1,503	84.6%
\$20,000 to \$34,999	2,081	85.3%
\$35,000 to \$49,999	1,358	54.8%
\$50,000 to \$74,999	685	24.9%
\$75,000 to \$99,999	112	6.3%
\$100,000 or more	0	0.0%

Source: US Census Bureau American Community Survey 2023 5-Year Estimates

CITY OF SAN ANGELO HOUSING MARKET TRENDS

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

The single-family housing market in San Angelo faces several structural and financial challenges, particularly in the realm of affordability.

Nonprofit organizations that build affordable housing must often cover infrastructure costs ranging from \$25,000 to \$35,000 per lot, in addition to paying for increasingly expensive permits. These homes are typically constructed on donated lots and sold at the cost to build to qualifying families. However, the burden of permitting requirements, development costs and limited grant funding often causes delays or prevents projects from moving forward altogether.

The development environment is further complicated by regulatory barriers. San Angelo enforces a minimum lot size of 5,000 square feet, and the combined price of a lot and development can reach approximately \$70,000.

Builders are also required to implement detention ponds—one acre for every five acres developed—and contribute land for city parks at a ratio of one per 70 lots. These obligations increase both the financial and opportunity costs, often making homes sold at or near the median price unprofitable for builders.

The zoning and permitting process within the city can deter development, particularly when compared to more lenient requirements in surrounding Tom Green County.

New construction is also affected by rising material and labor costs, a problem exacerbated by the COVID-19 pandemic. Labor shortages are tied not only to increased demand but also to competition from job markets in nearby Midland-Odessa and a cultural decline in young people entering trades such as carpentry, HVAC, and plumbing. These constraints slow the pace of development and limit the supply of new single-family homes.

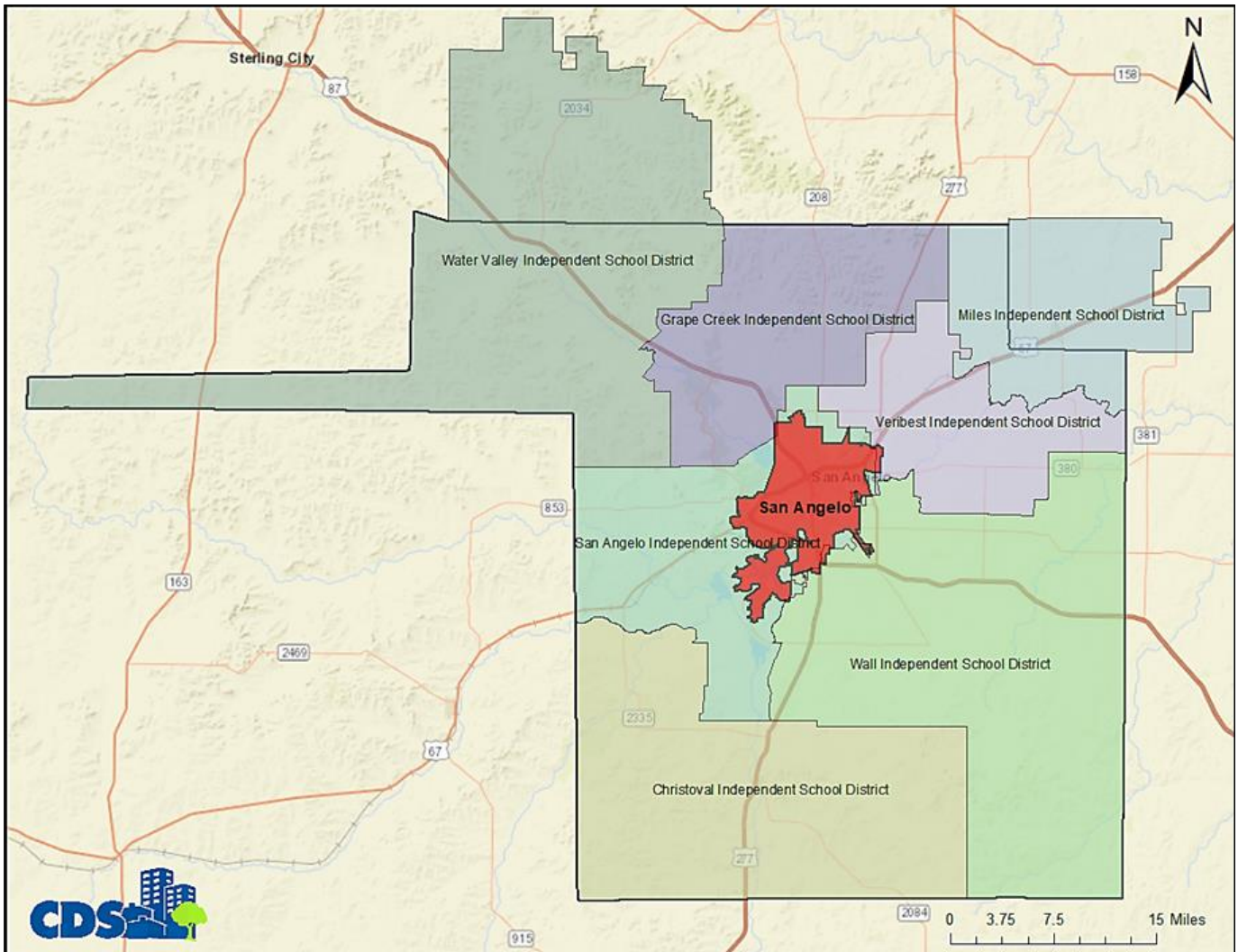
The City of San Angelo's Homebuyer Assistance Program offers down payment assistance for first-time buyers, but the program's effectiveness is limited. Because the assistance is contingent on the property passing an inspection—which often reveals the need for costly repairs—many potential buyers find the support inaccessible. Additionally, entry-level homes are increasingly difficult to access, and complaints from new employees moving to San Angelo often include high property taxes, high home prices, and outdated school campuses.

City of San Angelo Single-family Trends

The following data shows existing home sales data for the City of San Angelo (the red area in the map below).

The data analyzed also includes San Angelo Independent School District. Surrounding school districts in the County are also outlined and labeled for reference.

Figure 48: Tom Green County, City of San Angelo, and School Districts



Source: CDS Community Development Strategies

City of San Angelo Existing Single-family Sales

The following section provides an overview of the supply of housing in San Angelo with an emphasis on home sales priced at levels that are possibly accessible to the most common local worker households in the City. The data shown represents annual sales volumes, not unit sales. Consequently, this data could represent the same unit sold multiple times.

Table 49 shows sales volume by price range in San Angelo from 2015 to April 2025.

- There have been more than 13,000 home sales in San Angelo in the past decade, about an average of 1,300 home sales per year.
- Total Sales Volume has declined slightly by -3%, from 1,219 in 2014 to 1,187 in 2024.
- The market has shifted significantly toward higher-priced homes, reflecting both home price inflation and potential shifts in buyer profiles and housing stock availability.

Table 49: City of San Angelo Existing Homes Sales by Price Ranges, 2014 – 2025

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025 (April)
\$0 - \$99,999	235	199	198	217	162	137	88	93	73	76	10
\$100,000 - \$159,999	397	413	394	386	441	388	287	200	152	150	23
\$160,000 - \$199,999	273	253	265	305	282	306	354	240	196	199	37
\$200,000 - \$249,999	145	135	169	203	274	323	313	292	227	218	41
\$250,000 - \$299,999	79	81	85	100	143	172	264	252	214	187	36
\$300,000 - \$399,999	63	57	62	67	94	129	202	185	198	219	41
\$400,000 - \$499,999	17	24	21	37	38	42	60	68	66	75	9
\$500,000 +	18	12	13	18	33	27	66	95	85	63	16
Total	1,227	1,174	1,207	1,333	1,467	1,524	1,634	1,425	1,211	1,187	213

Source: San Angelo Association of Realtors

Sales by Price Tier

Figure 50 shows San Angelo home prices by price range.

Affordable Homes (Below \$200K):

- Homes priced \$0–\$99K dropped -70% in sales over the 10-year period.
- Homes in the \$100K–\$159K range declined -64%.
- This reflects severe erosion in entry-level inventory, impacting affordability and first-time homebuyers.

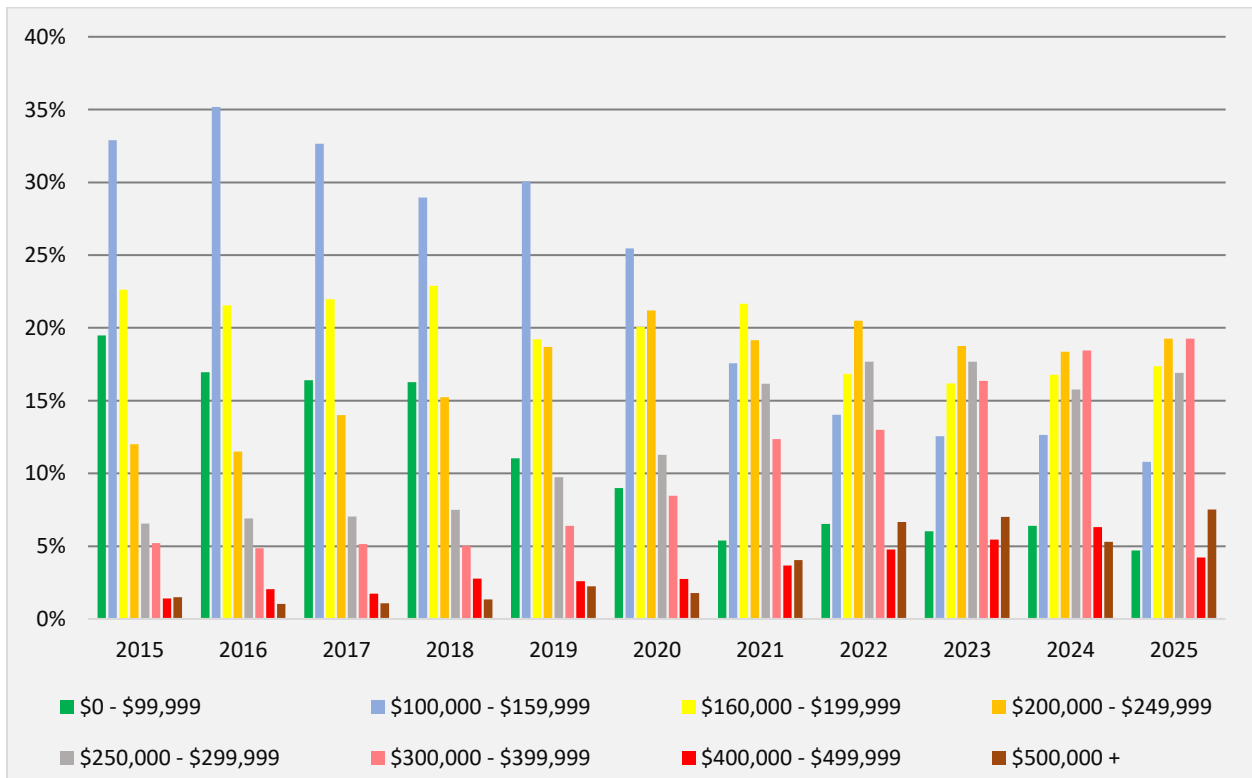
Middle Market (\$200K–\$399K):

- Sales in the \$200K–\$249K bracket increased 61%, and \$250K–\$299K jumped 146%.
- The \$300K–\$399K segment surged 271%, indicating significant market activity and new supply in this range.

Upper Market (\$400K+):

- The \$400K–\$499K segment grew by 213%, and the \$500K+ category grew a staggering 473% — albeit from a low base.
- This trend suggests increased luxury development or appreciation of existing stock, reflecting shifting buyer profiles and possibly in-migration of higher-income buyers.

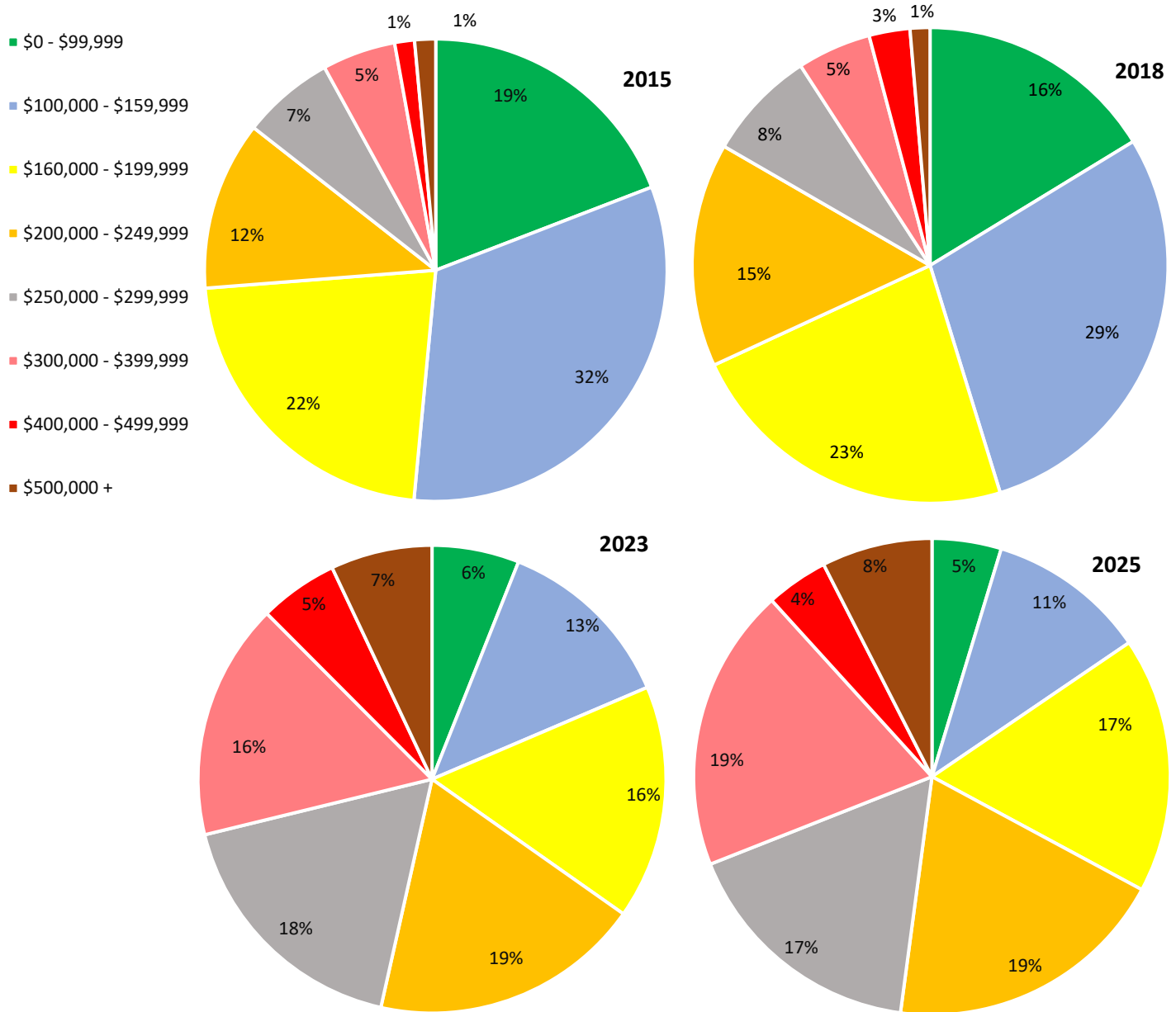
Figure 50: City of San Angelo Existing Homes Sales by Price Ranges, 2015 – 2025



Source: San Angelo Association of Realtors

Figure 51 shows home sales volume by year and price range in San Angelo.

Figure 51: San Angelo Existing Homes Sales by Price Ranges, 2015 – 2025



Source: San Angelo Association of Realtors

Key San Angelo Home Sales Trends by Year

2015

- Dominated by homes priced between \$100K–\$159K (32%).
- Lower-priced homes (below \$200K) made up a substantial 66% of the market.
- Homes above \$300K were rare, comprising less than 10%.

2018

- Gradual shift upward: \$100K–\$159K share fell to 29%, while \$200K–\$299K ranges grew to 23%.
- Higher-end segments (\$300K+) began modest growth but remained under 15% of the market.

2023

- Major rebalancing: Lower-tier segments below \$200K dropped significantly.
- \$200K–\$399K range dominated (totaling 54%), showing that middle-market homes became the new majority.
- \$500K+ homes appeared in the chart for the first time with 5% share.

2025 (Projected)

- \$300K–\$399K segment projected to hold 19%, reflecting continued demand for upper-middle tier homes.
- \$250K–\$299K range also remains strong at 19%.
- Lower-cost homes under \$160K fall to 11%, showing a clear decline in affordability.
- Luxury segments (\$400K+) make up 17%, up from 10% in 2018.

Implications

- The charts demonstrate a clear upward shift in home prices over the past decade, with entry-level inventory shrinking dramatically.
- Middle- and upper-tier homes now dominate the San Angelo housing market, which may impact affordability, particularly for first-time buyers, lower-income working households and retirees.
- The rise of homes \$400K+ reflects both price inflation and increased demand from higher-income or relocating buyers.
- Policy responses such as incentivizing affordable housing development or promoting diverse housing types may be needed to ensure market balance.

San Angelo Single-Family Sales Data

above shows the financing utilized each year in San Angelo. There was an average of 110 sales per month over the past decade.

Table 52: City of San Angelo Sales Financing, 2014 – 2024

Residential Financing	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Cash	221	231	208	234	239	251	222	298	337	318	282
Conventional	485	420	407	409	496	593	658	640	555	439	379
FHA	296	373	344	324	348	352	391	380	293	259	288
VA	201	186	191	196	230	255	238	295	234	176	223
Owner Carry	9	7	5	7	10	5	9	5	3	4	6
Other	7	10	19	36	10	11	6	16	3	15	9
Total	1,219	1,227	1,174	1,206	1,333	1,467	1,524	1,634	1,425	1,211	1,187

Source: San Angelo Association of Realtors

- Conventional loans were the most common financing method, peaking in 2020 (658 sales) and steadily declining to 379 by 2024. This is likely a direct result of the interest rate spike that started in early 2022.
- FHA loans remain consistently popular, especially for entry-level buyers, accounting for about 20–25% of annual sales.
- Cash sales rose significantly post-2020, reaching a peak of 337 in 2022, likely due to investor activity and retirees purchasing outright.
- VA loans followed a similar pattern, peaking in 2021 (295), reflecting growth in veteran or military-linked buyers.

Table 53 shows sales by days on market for existing homes in San Angelo from 2014 to 2024.

- Average Days on Market fell from 99 (2015) to a low of 63 (2020), then rose again to 100 by 2025, indicating recent softening and an increase in inventory.
- Quick sales (0–60 days) peaked in 2021 (1,095 sales), suggesting high demand and low inventory during the pandemic.

Table 53: City of San Angelo Sales by Days on Market, 2014 – 2024

Days on Market	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
0 – 30	102	85	52	72	109	150	161	179	193	142	109
31 – 60	401	438	336	379	463	638	756	916	762	575	460
61 – 90	249	258	233	243	244	281	260	274	220	202	253
91- 120	155	132	177	157	167	137	120	117	102	122	153
121+	312	314	372	351	347	253	220	144	145	165	210
Total	1,219	1,227	1,170	1,202	1,330	1,459	1,517	1,630	1,422	1,206	1,185

Source: San Angelo Association of Realtors

Table 54 shows average days on market each year from 2015 to April 2025 in San Angelo.

Table 54: San Angelo Sales by Average Days on Market, 2015 – 2025

Average Days on Market	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
	99	110	106	97	81	76	63	65	70	81	100

Source: San Angelo Association of Realtors

- Listings sitting 121+ days dropped significantly from 372 (2016) to 144 (2021), but have risen again to 210 by 2024, indicating a potential slowdown or mismatch between pricing and buyer expectations.
- So far in 2025 the average days on the market is 100, about 3 months.

Table 55 shows sales by year and number of bedrooms.

Table 55: City of San Angelo Sales by Number of Bedrooms, 2014 – 2024

Bedrooms	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
2-	161	172	143	158	185	172	176	185	202	185	174
3	763	775	753	798	835	904	981	1,035	886	733	736
4+	295	280	278	251	313	391	367	414	337	293	277
Total	1,219	1,227	1,174	1,207	1,333	1,467	1,524	1,634	1,425	1,211	1,187

Source: San Angelo Association of Realtors

- 3-bedroom homes dominate the market, representing roughly 60–65% of sales annually.
- Sales of 4+ bedroom homes peaked in 2021 (414) but declined to 277 by 2024, possibly reflecting affordability constraints or declining inventory.
- 2-bedroom homes remained relatively stable (150–185 per year), likely appealing to retirees or first-time buyers.

Table 56 shows the median sale price in San Angelo.

Table 56: City of San Angelo Median Sold Price, 2015 – 2025

Median Sold Price	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
	\$157,500	\$157,900	\$160,100	\$166,500	\$176,000	\$187,450	\$215,000	\$230,000	\$236,900	\$237,500	\$240,000

Source: San Angelo Association of Realtors

- Median Sold Price increased from \$157,500 (2015) to \$240,000 (2025) — a 52% gain over 10 years.
- The median sold price in San Angelo has increased each year since 2008.

Table 57 shows the average sale price in San Angelo.

Table 57: City of San Angelo Average Sold Price, 2015 – 2025

Average Sold Price	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
	\$174,991	\$172,840	\$176,419	\$182,946	\$197,715	\$208,225	\$238,619	\$258,081	\$268,000	\$265,331	\$273,766

Source: San Angelo Association of Realtors

- Average Sold Price rose even more dramatically, from \$174,991 (2015) to \$273,766 (2025) — a 56% increase, suggesting a shift toward higher-priced or luxury homes.

Table 58 shows total new listings each year.

Table 58: City of San Angelo Total New Listings, 2015 – 2025

Total New Listings	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
	1,631	1,718	1,615	1,703	1,652	1,869	1,787	1,936	1,924	1,926	2,209

Source: San Angelo Association of Realtors

- Total New Listings have increased by 35%, from 1,631 (2014) to 2,209 (2024), helping to slightly ease inventory constraints.
- The sharp rise in listings in 2024 may suggest increasing seller activity, possibly driven by market softening, rising rates, or changing life circumstances.

Months of Supply

Realtor’s use the term “months of supply” to describe the inventory of homes on the market. 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.

- San Angelo has averaged 110 sales per month in the past decade.
- As of May 2025, there was an estimated 600 homes listed for sale.
- This puts the current supply at about 5.5 months.

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.

The single-family residential housing market in the San Angelo area currently appears to be a balanced market.

Key Single-Family Market Takeaways

- San Angelo’s housing market has seen strong price appreciation and tightening inventory, especially during 2020–2022.
- Recent increases in days on market and higher-end home sales suggest a smaller pool of attractive entry level homes and a market that is stabilizing or softening in 2023–2024.
- Continued increases in listings may provide opportunities for buyers after several years of competitive conditions.

City of San Angelo Affordable Single-Family Demand

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.

The calculations indicate that a first-time home purchase for households with incomes under \$58,000 is likely unrealistic. Also, this analysis does not consider that potential buyers may have other current debt that effectively reduces their qualifying income.

Assumptions

	<u>Tax Rates</u>	
TOM GREEN COUNTY	0.47290	
CITY OF SAN ANGELO	0.75440	
SAN ANGELO ISD	0.81231	
<u>Total</u>	2.03961	
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
Mortgage rate	6.890%	per year
Mortgage term	30	years
Insurance	\$3,800	per year
Affordability standard	30%	of gross income
Average Texas Credit Score	695	

Error! Reference source not found. shows the required annual income for various home prices in San Angelo. This table incorporates local tax rates and average monthly home cost factors for Tom Green County.

It should be noted that the table below is an FHA, 3.5% down payment model for an applicant with an average credit score of 695. This means that any potential buyer eligible for conventional loan underwriting with a higher credit score and down payment will have greater home purchasing power than shown in the table.

Table 59: San Angelo Attainable For-Sale Home Price Calculation (FHA Mortgage)

Home price	\$175,000	\$185,000	\$200,000	\$225,000	\$250,000	\$300,000	\$350,000	\$400,000	\$450,000	\$500,000
Down payment	\$6,125	\$6,475	\$7,000	\$7,875	\$8,750	\$10,500	\$12,250	\$14,000	\$15,750	\$17,500
Closing costs	\$7,000	\$7,400	\$8,000	\$9,000	\$10,000	\$12,000	\$14,000	\$16,000	\$18,000	\$20,000
Total up-front costs	\$13,125	\$13,875	\$15,000	\$16,875	\$18,750	\$22,500	\$26,250	\$30,000	\$33,750	\$37,500
FHA Loan amount	\$171,830	\$181,649	\$196,378	\$220,925	\$245,472	\$294,566	\$343,661	\$392,755	\$441,849	\$490,944
Monthly mortgage	\$1,140	\$1,205	\$1,303	\$1,466	\$1,629	\$1,955	\$2,280	\$2,606	\$2,932	\$3,258
Monthly MIP	\$122	\$129	\$139	\$156	\$174	\$209	\$243	\$278	\$313	\$348
Monthly home insurance	\$317	\$317	\$317	\$317	\$317	\$317	\$317	\$317	\$317	\$317
Monthly taxes	\$297	\$314	\$340	\$382	\$425	\$510	\$595	\$680	\$765	\$850
Total PITI with MIP	\$1,876	\$1,965	\$2,099	\$2,321	\$2,544	\$2,990	\$3,435	\$3,881	\$4,326	\$4,772
Required monthly gross income	\$6,253	\$6,550	\$6,996	\$7,738	\$8,481	\$9,966	\$11,451	\$12,936	\$14,421	\$15,906
Required annual income	\$75,038	\$78,602	\$83,949	\$92,859	\$101,769	\$119,589	\$137,410	\$155,230	\$173,051	\$190,871
Hourly wage equivalent @ 2,080 hours	\$36.08	\$37.79	\$40.36	\$44.64	\$48.93	\$57.49	\$66.06	\$74.63	\$83.20	\$91.77

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

Table 60 shows Census data estimates of the number of cost-burdened households in 2023 in San Angelo and the associated maximum home price these households could pursue without being cost-burdened:

Table 60: Estimated San Angelo Affordable For-Sale Housing Need by Income Range, 2023

Income Range	# Cost-Burdened Households	Home Price Range Needed
\$20,000 to \$34,999	1,299	Renter \$500-\$875 a month
\$35,000 to \$49,999	765	Renter \$875-\$1,250 a month
\$50,000 to \$74,999	1,271	\$100,000 - \$175,000
Total	3,335	

Source: US Census Bureau American Community Survey 2017 1-Year Estimates

- Households making less than \$75,000 are likely candidates for transitioning from owning to renting.

City of San Angelo Affordable Multifamily Demand

Table 61 shows the annual income required for the maximum rent that is no more than 30% of income on rent.

Table 61: Attainable 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
Max. rent	\$375	\$500	\$625	\$750	\$875	\$1,000	\$1,125	\$1,250	\$1,375	\$1,500	\$1,625	\$1,750	\$1,875

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

Table 62 shows Census data estimates of the number of cost-burdened households in 2017 in San Angelo and the associated maximum rent price these households could pursue without being cost-burdened:

Table 62: Estimated San Angelo Affordable Rental Housing Need by Income Range, 2017

Income Range	# Cost-Burdened Households	Monthly Rent Range Needed
Less than \$20,000	2,396	Under \$500
\$20,000 to \$34,999	2,081	\$500 to \$875
\$35,000 to \$49,999	1,358	\$875 to \$1,250
Total	5,835	

Source: US Census Bureau American Community Survey 2017 1-Year Estimates

- Incomes less than \$35,000 are likely candidates for affordable rental units in housing authority, non-profit, housing choice voucher or tax credit affordable rental units.

Residential New Construction Trends

San Angelo MSA Single-family Building Permits

Table 63 below shows single-family residential building permits in Tom Green County from 2016 to 2023 and provides a timeline of residential building permits in the County along with the amount, price and change.

Table 63: San Angelo MSA Single-family Residential Building Permits 2016-2023

Date	Number of Dwelling Units	Percent Change	Average Value (\$) per Dwelling Unit	Percent Change
2016	172	-27.10%	\$226,700	15.00%
2017	193	12.20%	\$217,700	-4.00%
2018	262	35.75%	\$216,600	-0.48%
2019	283	8.02%	\$217,286	0.31%
2020	686	142.40%	\$208,753	-3.93%
2021	333	-51.46%	\$215,805	3.38%
2022	322	-3.30%	\$244,454	13.28%
2023	252	-21.74%	\$279,447	14.31%
Total	2,503	-	-	-

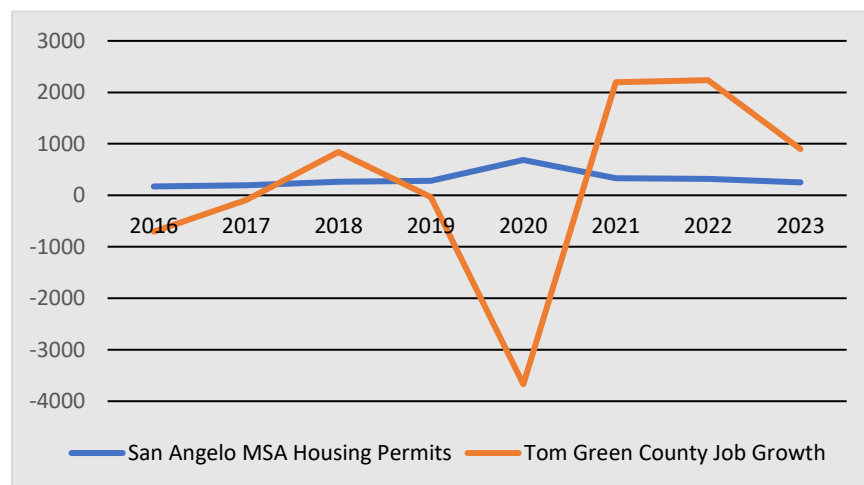
Source: The Real Estate Center at Texas A&M University

- There were 2,503 new housing permits issued since 2016.
- Permits peaked in 2020 at 686 and decreased each year to 252 in 2023.

Figure 64 shows housing permits and job growth.

- There was a total of 2,503 single-family permits issued and 2,371 jobs created in the County from 2016-2023.
- This shows that housing development seems to have kept pace with job growth.

Figure 64: San Angelo MSA Housing Permits and Tom Green County Job Growth 2016-2023



Source: The Real Estate Center at Texas A&M University, QCEW

Table 65 shows 2 to 4 unit housing permits in the San Angelo MSA.

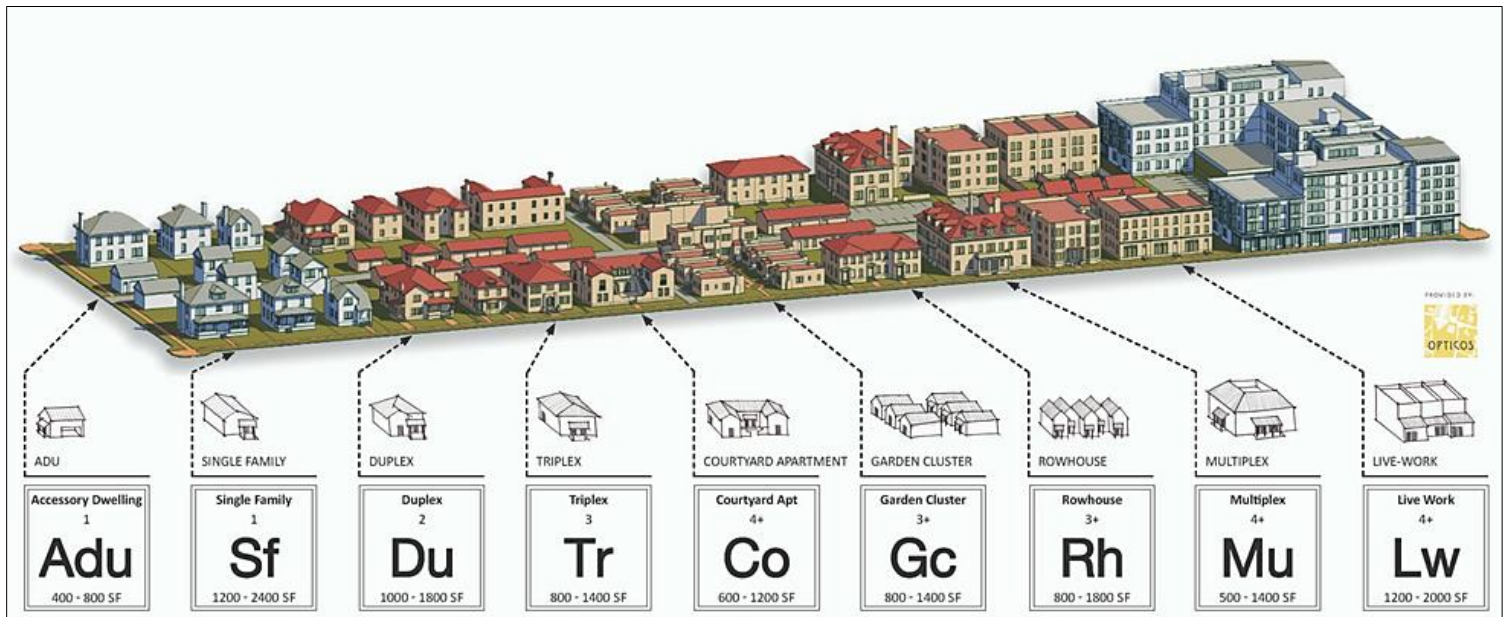
- There were only 4 units permitted since 2016, showing a large gap in the production of new missing middle housing types.

Table 65: 2 to 4 Unit Building Permits for San Angelo MSA, 2013 – 2023

Year	San Angelo MSA Permits	Avg. Value Per Unit
2016	0	\$0
2017	4	\$165,000
2018	0	\$0
2019	0	\$0
2020	0	\$0
2021	0	\$0
2022	0	\$0
2023	0	\$0
Total/Average	4	\$660,000 / \$165,000

Source: The Real Estate Center at Texas A&M University, CDS Community Development Strategies

Figure 66: Missing-Middle Housing Types



Source: Opticos Design

- These housing types are typically what makes up the "missing middle" housing that are the primary housing types for local workforce, especially police, fire, ems, teachers, healthcare, city staff.
- In most cases local city development and zoning regulations and requirements need to be updated to allow for the development of smaller lot and denser missing-middle housing types.

- Missing Middle housing can be defined as a spectrum of multi-unit housing types such as duplexes, fourplexes, bungalow courts, and mansion apartments that are not bigger than a large house.
- The important distinction is that these housing types are allowed to be located within existing walkable, traditional core neighborhoods embedded within primarily single-family home neighborhoods.
- Allowing and creating these diverse housing types provide greater choices and generate critical mass that can support transit and locally serving commercial amenities.
- Existing examples can be found in pre-war building stocks, but these housing types have become much less common (hence the “missing”) in many cases due to restrictive zoning, building and fire codes which make the new construction of these housing types in existing single-family neighborhoods illegal.

New Single-Family Construction

Figure 67: 2025 San Angelo New Home Construction



Source: San Angelo Builders Association, Parade of Homes April 2019

The figure above shows the location of featured new single-family home construction in San Angelo in 2019, however as of 2025 these general locations are still the primary areas for new home construction.

The southwest is popular for moderate to high priced custom and luxury homes along Southland Blvd.

These are being built in large, new development subdivisions predominately undeveloped land tracts.

The northside/Lake View area is a sub-market for new infill of entry level single-family home construction in San Angelo of the most affordable entry level homes.

Currently the lowest priced newly constructed entry level single-family home in San Angelo are priced at \$199,900.

However, this has increased from about \$145,000 in 2017 and can mostly be attributed to the increase of infill lot costs from \$20,000 per lot to about \$30,000 to \$40,000 per lot. This includes costs for new infrastructure.

There are currently about 20 new construction homes listed for sale in the \$200,000 to \$250,000 price range and represent the market's only source of new entry-level priced homes.

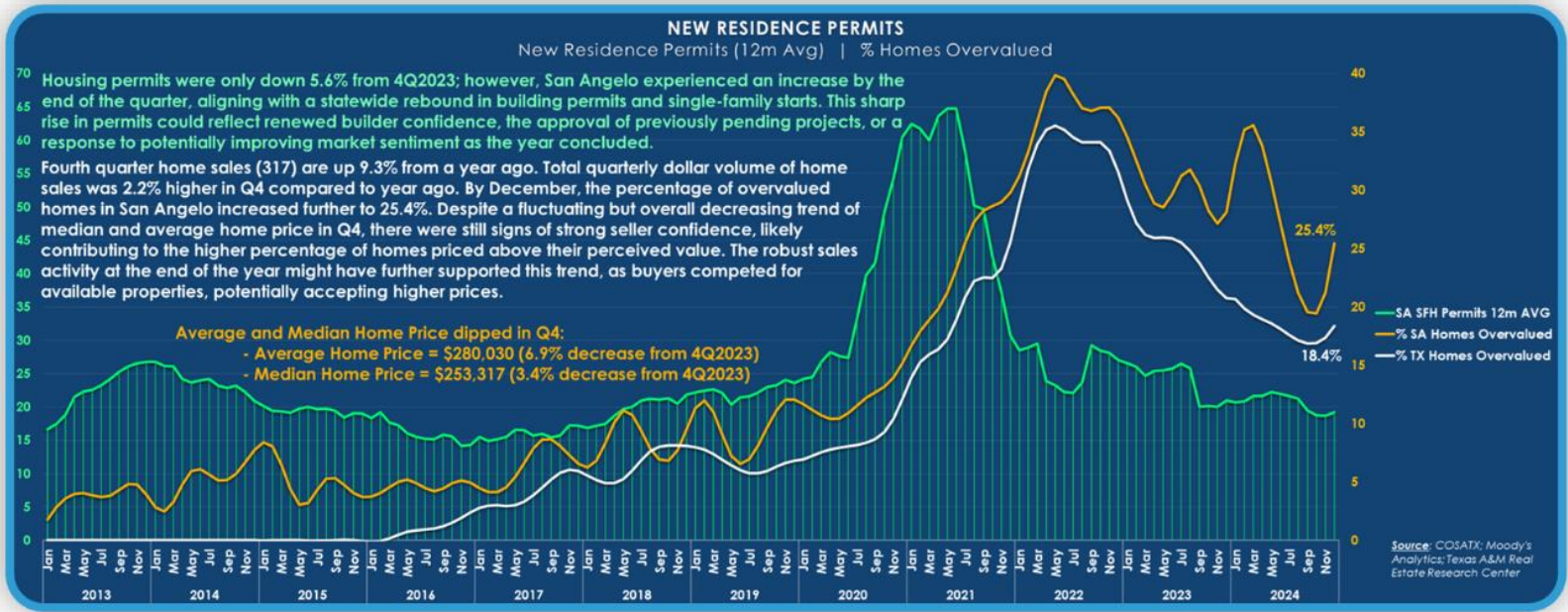
Figure 68: New Entry Level Single-Family Home Construction



The San Angelo Chamber of Commerce Economic Development team tracks important housing market data. Their Q4 2024 report contains important data shown below.

The chart below shows a 12-month rolling average of San Angelo new residence permits (single-family homes). The 12-month rolling average helps to smooth out short-term fluctuations and highlight longer-term trends or cycles. Overlaid are the monthly percentage of homes overvalued for San Angelo and the State of Texas.

Figure 69: San Angelo Single-family Housing Permits, Median and Average Home Prices



Source: San Angelo Chamber of Commerce Economic Development

Demand and supply of existing and new housing units greatly impacts the price of housing.

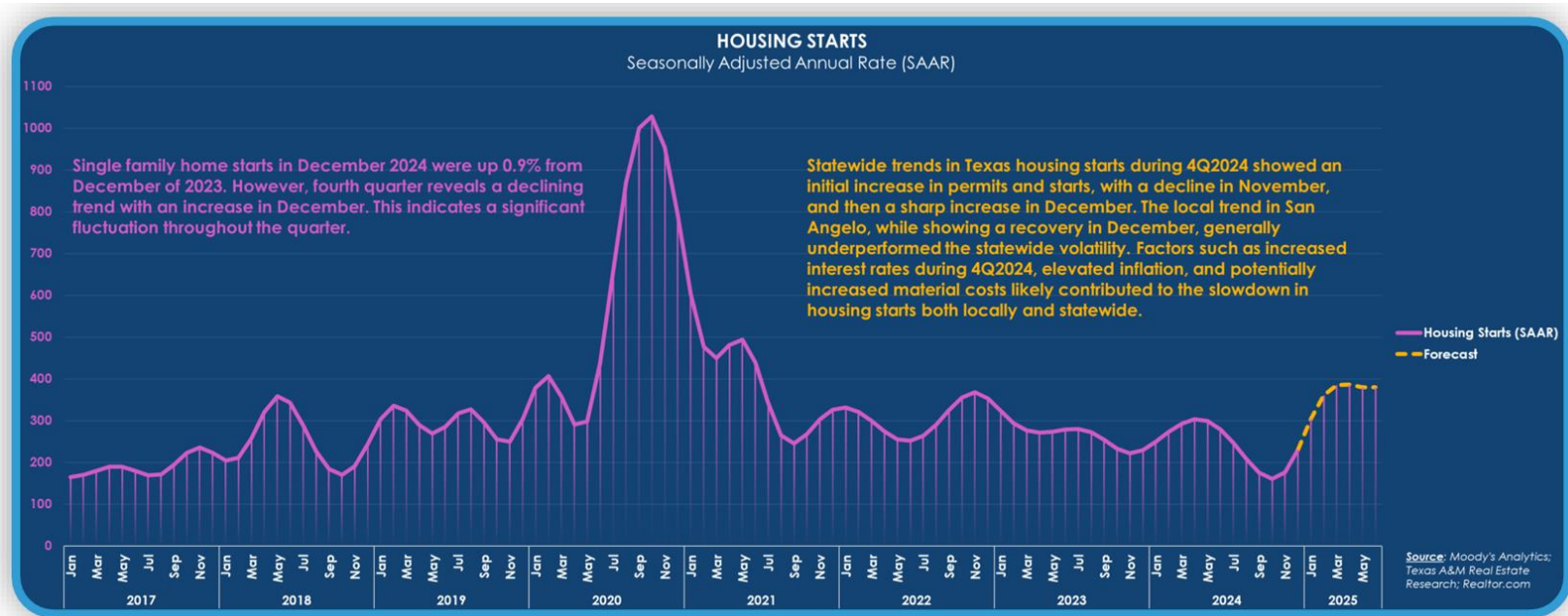
Given the significant demand derived from large drivers like GAFB, ASU, Healthcare, Manufacturing, and Retail, Food and Hospitality and tight supply of rental and entry level for-sale units the value of homes appears to be exhibiting upward price pressure.

Housing starts data is presented as a seasonally adjusted annual rate (SAAR), which represents the total number of housing starts that would occur over a year if the current month's pace were to continue.

This data provides valuable insights into the supply of housing and the broader economy, as housing starts typically correlate with economic growth, employment, and consumer spending.

Declining housing starts while job growth is increasing puts upward pressure on rental and for-sale housing prices.

Figure 70: San Angelo Single-family Housing Starts



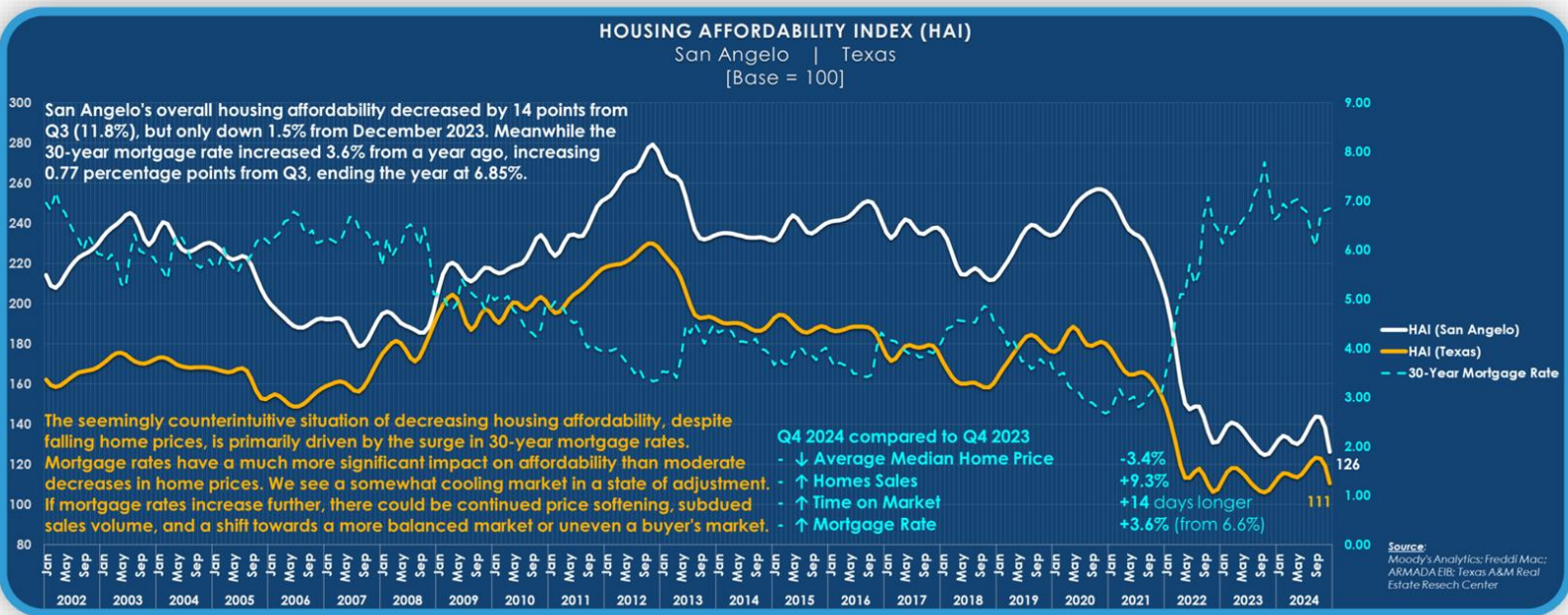
Source: San Angelo Chamber of Commerce Economic Development

Figure 71: San Angelo Earnings and Average Home Price



Source: San Angelo Chamber of Commerce Economic Development

Figure 72: San Angelo Housing Affordability Index



Source: San Angelo Chamber of Commerce Economic Development

Existing Home Market – Multifamily, Rental Units

San Angelo's multifamily housing market has remained highly active, largely due to limited affordability in the single-family sector. As many families are priced out of renting detached homes, apartments remain largely occupied. Some of the newer apartment complexes in the city report consistently high occupancy rates and typically lease out fully within six months to a year after completion.

According to leasing professionals, the renter population is a mix of retirees, students, full-time workers, and military personnel. Units tend to fill quickly regardless of size or price, and residents appear to value the convenience of renting, including amenities, freedom from maintenance responsibilities, and exemption from property taxes. Even as rents have risen, demand has not waned, highlighting a strong and stable need for multifamily housing options at various price points.

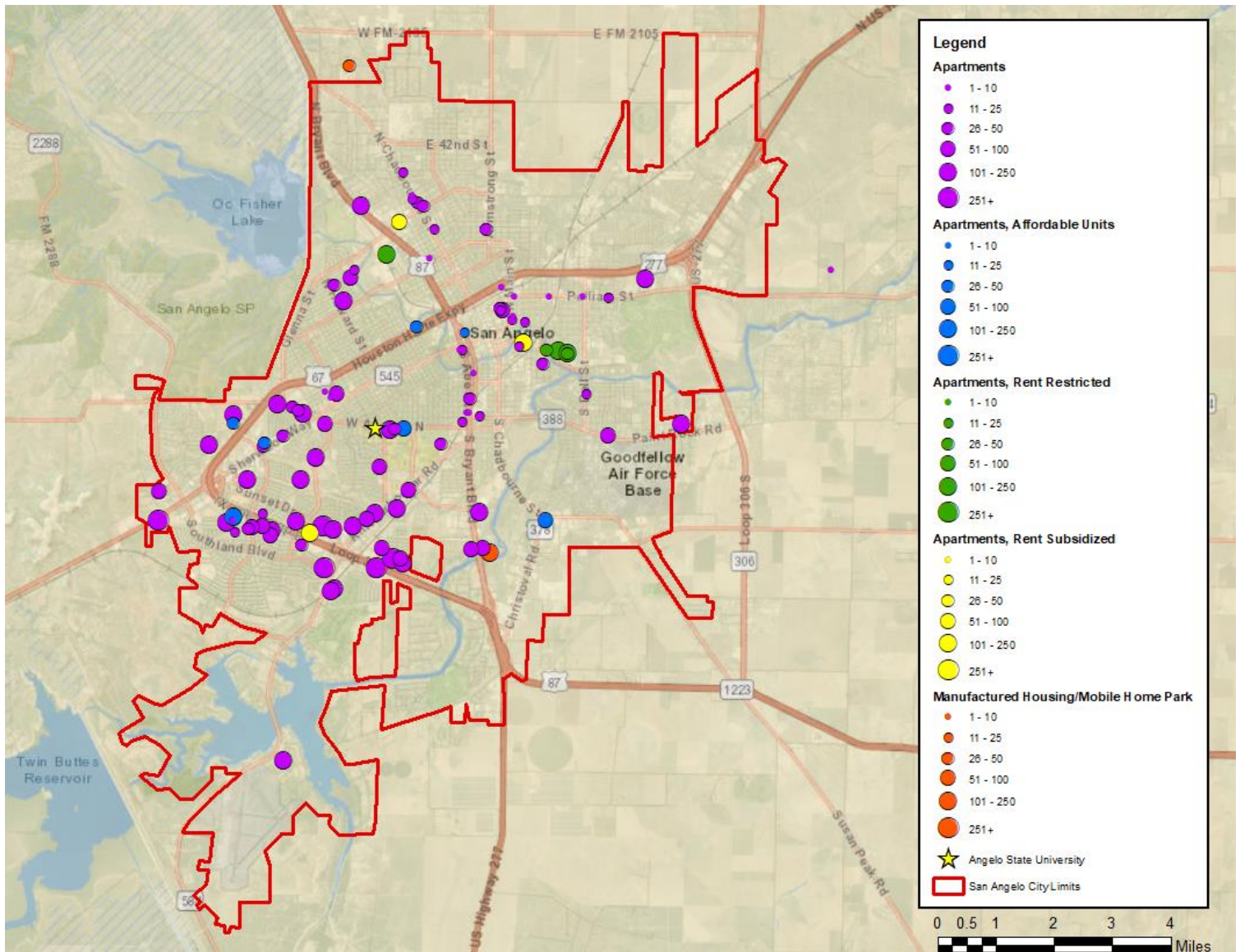
The multifamily market is also influenced by institutional factors. On-campus student housing at Angelo State University is both limited and outdated, while enrollment continues to grow. This creates spillover demand across the city's rental inventory. Similarly, personnel from Goodfellow Air Force Base contribute to consistent demand for multifamily housing. Meanwhile, there are no age-restricted, for-sale housing options to serve San Angelo's growing elderly population. Most rental options for this group also lack the quality and variety needed, further increasing demand for smaller, low-maintenance homes.

Figure 78 is a map of apartment and other rental properties and manufactured home locations in San Angelo.

The map is useful for understanding the current locations and size of existing rental properties and potential gaps where new multifamily properties may be in most demand.

Dots in the legend and on the map are various sizes based on the number of units at each property.

Figure 73: Multifamily Complexes by Type and Number of Units



Existing Multifamily Market Rate Apartments

above provides a sample of existing market rate multifamily apartment units in San Angelo. The most expensive rents range in the \$1,200 range and the lowest \$570. Occupancy across the City is very high which exacerbates pressure on rents.

Table 74: Market Rate Apartment Complexes

Property Name	Units	Ave. Unit Size	Year Built	Ave. Rent	Ave. Rent/SF	Occupancy
The BLVD	422	906	2013	1439	\$1.59	97.2%
Sedona Ranch	304	757	1979	\$883	\$1.16	90.5%
Wolf Creek Apartments	273	991	2022	\$1,376	\$1.39	97.5%
Southland Arms	268	820	1972	\$980	\$1.19	94.8%
Sunset Apartments	256	910	1981	\$1,110	\$1.22	96.5%
Jackson Way Apartments	250	531	1979	\$867	\$1.63	69.4%
Goodfellow Family Housing	250	-	-	-	-	-
Creek 27	249	769	2023	\$1,385	\$1.80	95.9%
Cameron Place Apartments	200	829	2015	\$1,034	\$1.25	97.7%
Lakeshore Village	200	1141	1988	\$1,441	\$1.26	99.0%
Wildewood	197	1038	-	\$996	\$0.96	75.3%
Plaza Square	192	779	1979	\$952	\$1.22	88.1%
The Retreat @ College Hills	182	818	1968	\$1,064	\$1.30	90.6%
Encino Park Apartments	180	916	1998	\$1,207	\$1.32	97.2%
Vistas at Red Creek	176	930	2014	\$1,335	\$1.43	92.0%
College Hills West	170	843	1971	\$1,169	\$1.39	96.9%
Raintree Apartments	168	684	1984	\$841	\$1.23	83.3%
Creekside	160	811	1982	\$984	\$1.21	89.7%
Wellington Place Apartments	160	934	1986	\$1,119	\$1.20	99.7%
Resort at Riverside	152	551	1983	\$742	\$1.35	88.2%
The Brixton	145	649	1987	\$976	\$1.50	94.4%
The Landing	142	867	1975	\$1,029	\$1.19	70.4%
Alamo Village Apartments	138	851	1977	\$909	\$1.07	94.8%
Bellagio At Sunset Apartments	136	839	1972	\$927	\$1.10	88.7%
Century Terrace	124	928	1984	\$1,062	\$1.14	95.9%
Windmill Park Apartment Homes	120	726	1976	\$795	\$1.09	93.8%
Stadium Oaks Apartments	120	600	1984	\$861	\$1.43	86.4%
Sonterra West Apartments	120	600	1984	\$894	\$1.49	93.2%
Bent Tree Apartments	112	891	2000	\$1,104	\$1.24	89.2%
Rock Brook	100	783	1984	\$929	\$1.19	92.7%
Rio Villas	100	713	1977	\$873	\$1.22	86.0%
Eagle Rock	92	787	1974	\$1,105	\$1.40	50.0%
Greystone Village	80	911	1969	-	-	91.2%
Crestwood Terrace Apartments	80	-	1965	-	-	91.2%
Bella Vista Apartments	80	637	1970	\$929	\$1.46	77.2%
Meadow Creek Apartments	80	1,031	1976	\$986	\$0.96	89.9%
The Annex	73	797	1983	\$876	\$1.10	93.2%
Rosewood Park Apartments	72	1326	1977	\$809	\$0.61	80.2%
Cielo Vista	72	1118	1968	\$1,146	\$1.02	88.9%
Ashley Oaks Apartments	72	781	1983	\$937	\$1.20	90.3%
4418 Southwest Apartments	72	848	1996	\$933	\$1.10	91.4%
San Angelo Terrace	72	1018	2024	\$941	\$0.92	67.2%

Property Name	Units	Ave. Unit Size	Year Built	Ave. Rent	Ave. Rent/SF	Occupancy
Koberlin	56	747	1979	\$786	\$1.05	94.1%
District 52 Apartments	52	1112	1965	\$1,154	\$1.04	96.7%
Cedar Crest South	48	-	1978	\$823	-	99.6%
Cross Keys Apartments	40	750	1967	-	-	91.2%
Oxford Court Apartments	40	896	1976	-	-	91.2%
Arden Arms	40	727	1968	\$880	\$1.21	40.0%
Cedar Crest North	40	-	1977	-	-	91.2%
Las rosas apartment	38	-	1981	-	-	91.2%
Parsons Place Apartments	38	548	1959	\$735	\$1.34	91.2%
Legacy Terrace	34	811	1979	\$849	\$1.05	92.0%
Cedar Crest Apartments	33	-	1983	-	-	91.2%
Magdalen Arms Apartments	33	-	1958	\$679	-	-
Concho Terrace	32	-	1978	\$865	-	91.2%
Red Arroyo Inn	32	500	1976	\$799	\$1.60	86.8%
College View Apartments	30	665	1974	-	-	91.2%
Harris Avenue Apartments	24	834	1972	\$744	\$0.89	-
Huntington Place Apartments	24	800	1983	-	-	100.0%
Hampton Arms Apartments	23	721	1975	\$790	\$1.09	96.5%
3zero2 River Walk	22	764	1971	\$1,000	\$1.31	96.6%
Depot Flats	22	798	2013	\$1,466	\$1.84	96.1%
Tuscan Valley Apartments	22	750	1976	\$817	\$1.09	90.7%
Enclave Apartments	14	614	1973	\$775	\$1.26	85.7%
LaMesa Apartments	12	706	1978	\$617	\$0.87	91.2%
Concho Vista	12	680	1971	\$856	\$1.26	83.3%
The Lodge	11	-	1959	\$798	-	91.2%
Bryant Place	10	600	2023	\$700	\$1.17	91.2%
San Antonio St. Lofts	10	-	1980	-	-	91.2%
The Magnolia Apartments	8	715	1974	\$864	\$1.21	82.4%
CPM Single Family	7	876	1959	\$944	\$1.08	91.2%
411 W Avenue C	6	775	2000	\$813	\$1.05	91.2%
	7,424	807	1982	\$962	\$1.23	92%

Source: CoStar (occupancy data here is lower than CDS found when interviewing apartment leasing agents)

Existing Multifamily Affordable Apartments

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. Affordable housing is a term which includes several types of housing such as income restricted housing, rent subsidized housing, supportive housing, public housing, and others.

Like regular market rate housing, most of the affordable housing that is developed today is privately built and owned, either by non-profit organizations or private businesses and corporations. These organizations use a combination of private funding and public subsidies, often in the form of tax credits and/or special loans, to construct new apartments that are affordable for low- and moderate-income families. These apartments are typically regulated by state and/or Federal agencies.

There are about 1,457 affordable and age restricted units. The table below shows student, affordable, age restricted and Goodfellow apartment properties.

Table 75: Affordable Apartment Complexes

Property Name	Units	Ave. Unit Size	Year Built	Ave. Rent	Ave. Rent/SF	Occupancy
Student Housing						
Texan Hall	248	432				91%
River Ranch Apartments	192	1,050	2009	\$1,641	\$1.56	91%
Angelo Place	120	1,332	2006	\$2,210	\$1.66	86%
Plaza Verde	120	1,000	2023			91%
Centennial Village	84	822				90%
Massie Halls Massie Halls	84	408				90%
Vanderventer Apartments	80	1,426				91%
Carr Hall	64	384				91%
Thunderbird Apartments	16		1975			94%
Total/Avg.	1,008	857	2003	\$1,926	\$1.61	92%
Affordable						
Property Name	Units	Ave. Unit Size	Year Built	Ave. Rent	Ave. Rent/SF	Occupancy
River Pointe Apartments	204	833	1970	\$715	\$0.86	84%
Nueva Vista Apartments	160	859	1971	\$1,287	\$1.50	
River Place	120	912	2010	\$905	\$0.99	
Cliffhouse Apartments	60	443	1977	\$745	\$1.68	67%
Glenn Park Apartments	60	1054	2021			90%
Aura Square Apartments	40	850	1977			93%
San Angelo Crossing	36	914	2023	\$1,133	\$1.24	
Noah Estates	36		2013	\$952		
4268 Sherwood Way	32		2002	\$784		92%

Property Name	Units	Ave. Unit Size	Year Built	Ave. Rent	Ave. Rent/SF	Occupancy
River Edge	32		2017			91%
Island Cottages	14		1959	\$684		
Total/Avg.	794	838	1995	\$901	\$1.25	86%
Aged Restricted						
Property Name	Units	Ave. Unit Size	Year Built	Ave. Rent	Ave. Rent/SF	Occupancy
Rio Concho Manor	226	571	1976			92%
Christian Village	150	688	1981	\$209	\$0.30	92%
Oak Grove Senior Apartments	142					91%
Kirby Park Villas	72	943	2018	\$1,083	\$1.15	97%
Oak Trails Senior Housing	48	838	2020	\$922	\$1.10	
Total/Avg.	638	760	1999	\$738	\$0.85	93%
Goodfellow AFB						
Property Name	Units	Ave. Unit Size	Year Built	Ave. Rent	Ave. Rent/SF	Occupancy
Goodfellow Family Housing	250					

Source: CoStar, CDS Community Development Strategies

Multifamily Market Summary

Table 76 below shows the status of the existing multifamily rental market in San Angelo as of 2Q2025.

- Overall market occupancy appears to be at a healthy 92%, however apartment complex leasing agents interviewed in person by CDS during field research indicated much higher occupancies in the 95%-100% range.
- Average rent is \$1,036
- Renter per square foot is \$1.26

Table 76: 2Q2025 Multifamily Data

Market Rate Properties	2025
Occupancy	92%
Units Absorbed (Annual)	41
Effective Rent	\$1,036
Effective Rent per SF	\$1.26

Source: CoStar

Table 77 provides the composition of property types that make up the San Angelo multifamily apartment rental market.

Overall, there are 123 properties containing a total of 10,469 rental units. This includes market rate, military, student, age restricted and affordable rental units.

Table 77: Multifamily Property Composition 2025

Property Type	% of Market	# of Properties	# of Units	Occupancy	Avg. SF	Avg. Rent	Avg. Rent Psf
Conventional	74%	97	7,779	87%	790	951	\$1.24
Student Housing	10%	9	1,008	91%	857	1,926	\$1.61
Affordable	8%	11	794	86%	838	901	\$1.25
Senior Living	6%	5	638	93%	760	738	\$0.85
Goodfellow	2%	1	250				
Total/Avg.	100%	123	10,469	92%	811	1,129	

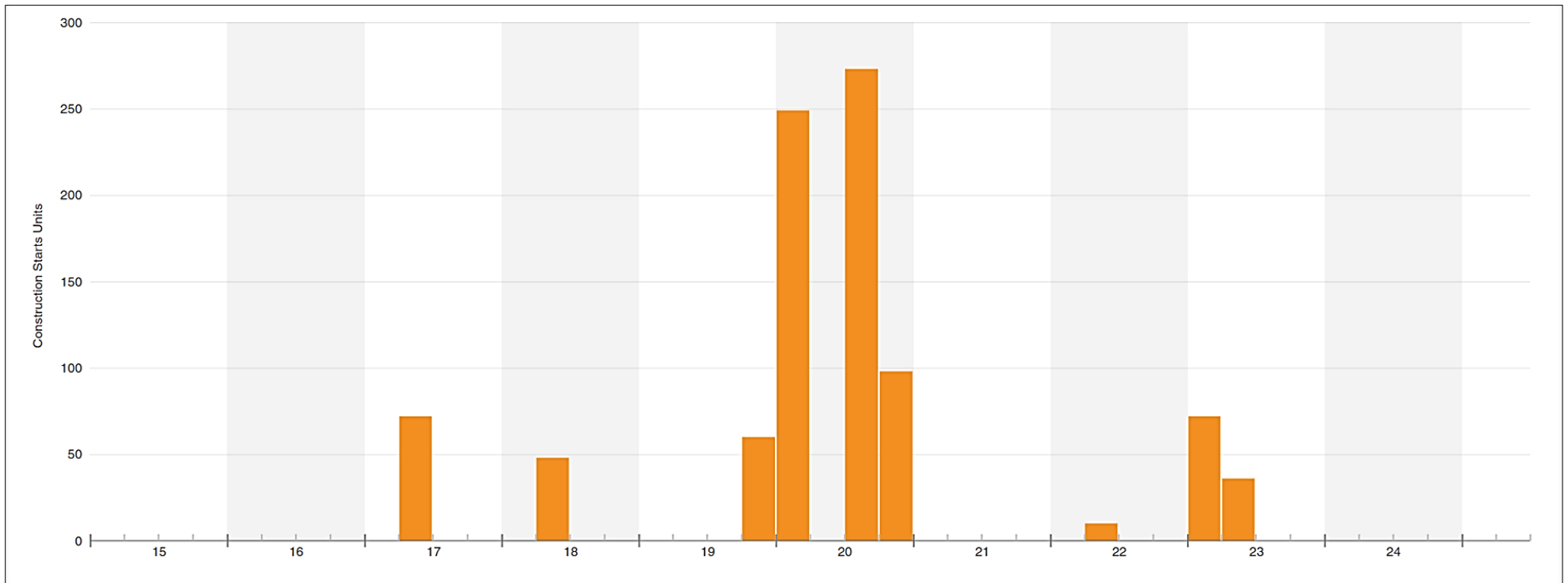
Source: CoStar

Multifamily Market Trends

Figure 78 shows multifamily unit construction starts in San Angelo from 2015-2024.

- Creek 27 (250 units) and Wolf Creek (273 units) in 2020 make up the bulk of new apartment construction.
- 108 units started construction in 2023.

Figure 78: Multifamily Unit Construction Starts, 2015 – 2024

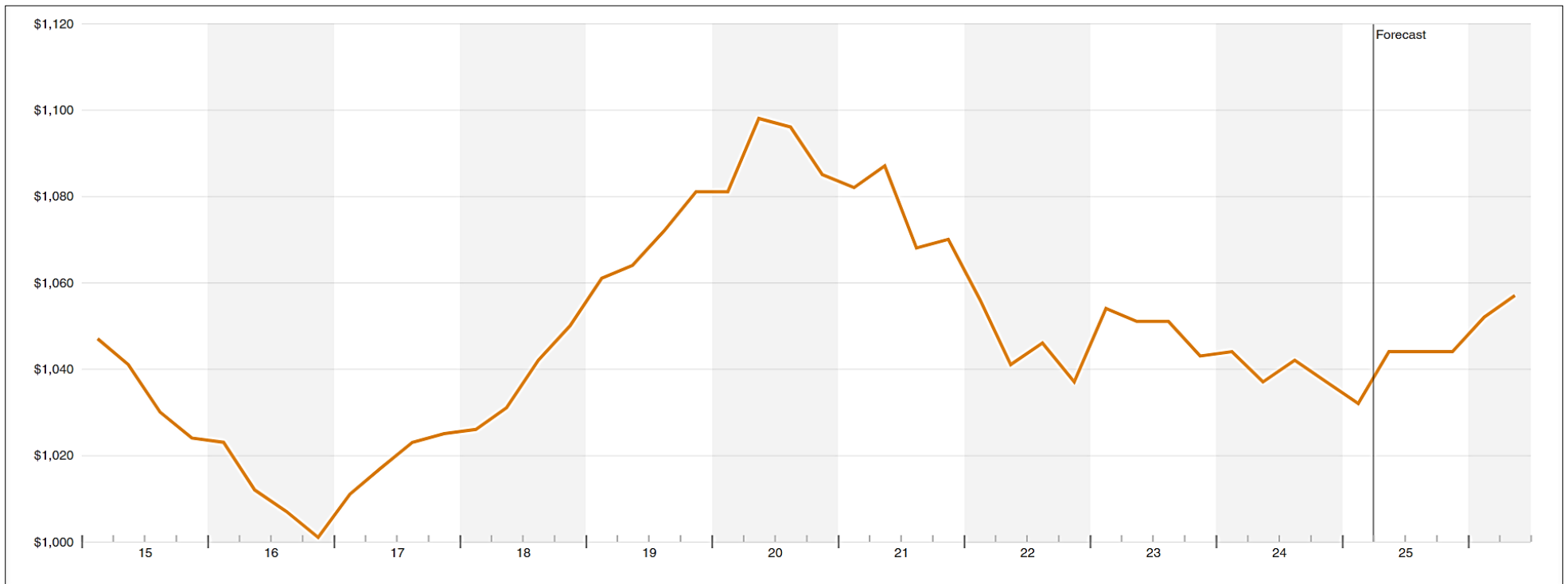


Source: CoStar, Adjusted to 2025 Inflation

Figure 79 shows multifamily market asking price per unit from 2015 to 2025.

- When adjusted for inflation market rent in San Angelo has remained between \$1,000 and \$1,100 per month.
- Average apartment rents spiked in 2020 up to \$1,100.
- 2025 average market rent is \$1,036.

Figure 79: San Angelo Multifamily Market Asking Price Per Unit, 2015 to 2025

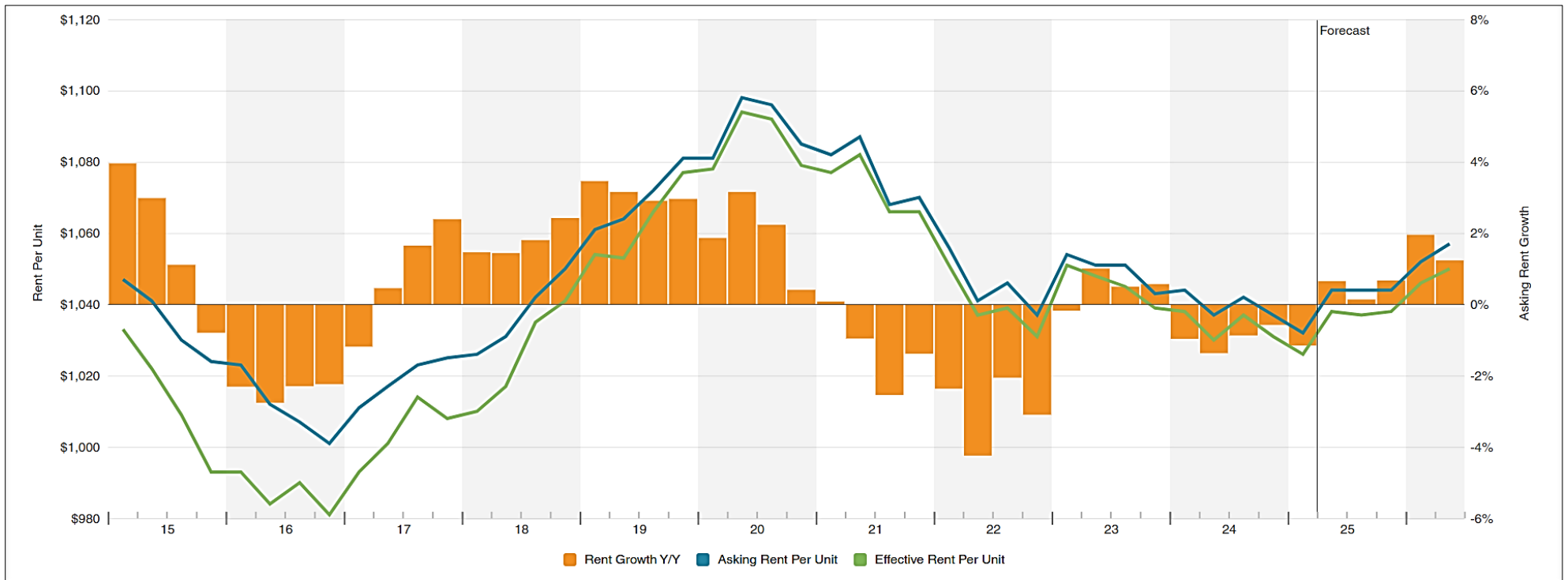


Source: CoStar, Adjusted to 2025 Inflation

Figure 80 shows multifamily market rent per unit and rent growth from 2015 to 2025.

- Rent growth took place from 2017 to 2020.
- Since 2020 rent growth appears to be negative until 2023.
- The new supply of apartments (Wolf Creek and Creek 27) appears to have moderated rent growth by providing enough supply to cool apartment rental market prices.

Figure 80: San Angelo Multifamily Market Rent Per Unit and Rent Growth, 2015 to 2025



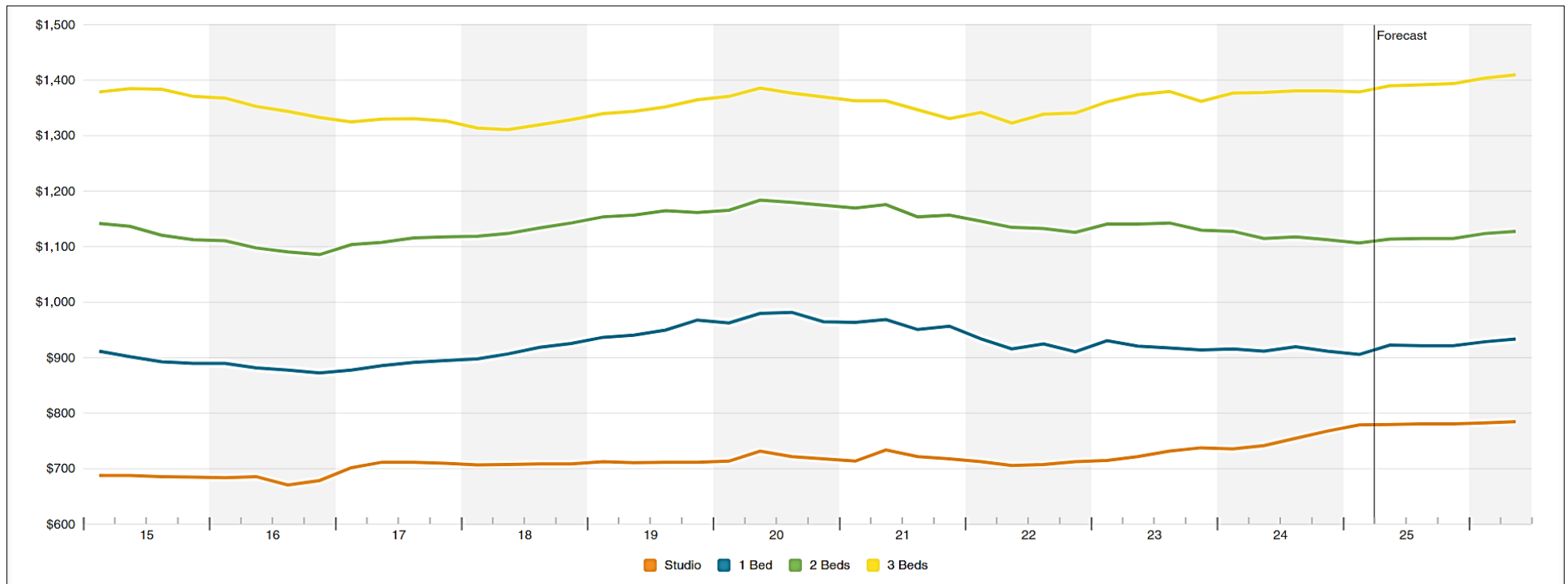
Source: CoStar, Adjusted to 2025 Inflation

Figure 81 shows multifamily market rate asking rent per unit by bedroom from 2015 to 2025.

When adjusting for inflation it appears that one bedroom units experienced the greatest rent growth.

- One bedroom rents have increased from \$687 in 2015 to \$776 in 2025.
- Two bedroom rents have increased from \$900 in 2015 to \$912 in 2025.
- Three bedroom rents have increased from \$1,140 to \$1,108 in 2025
- Three bedroom rents have increased from \$1,378 to \$1,381 in 2025.

Figure 81: San Angelo Multifamily Market Rate Asking Rent Per Unit By Bedroom, 2015 to 2025

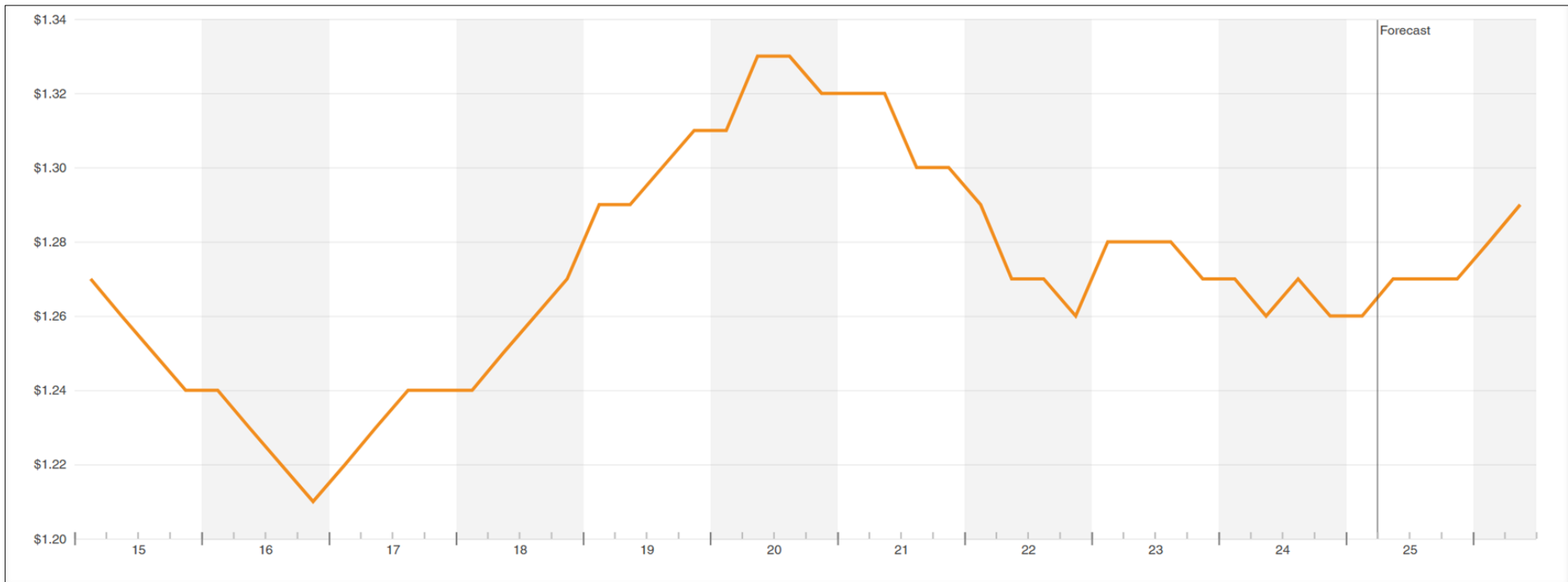


Source: CoStar, Adjusted to 2025 Inflation

Figure 82 shows market asking rent per square foot.

- Rent per square foot in San Angelo has remained between \$1.20 to \$1.33.
- The current rent per square foot is \$1.25.

Figure 82: San Angelo Multifamily Market Asking Rent Per Square Foot, 2015 to 2025

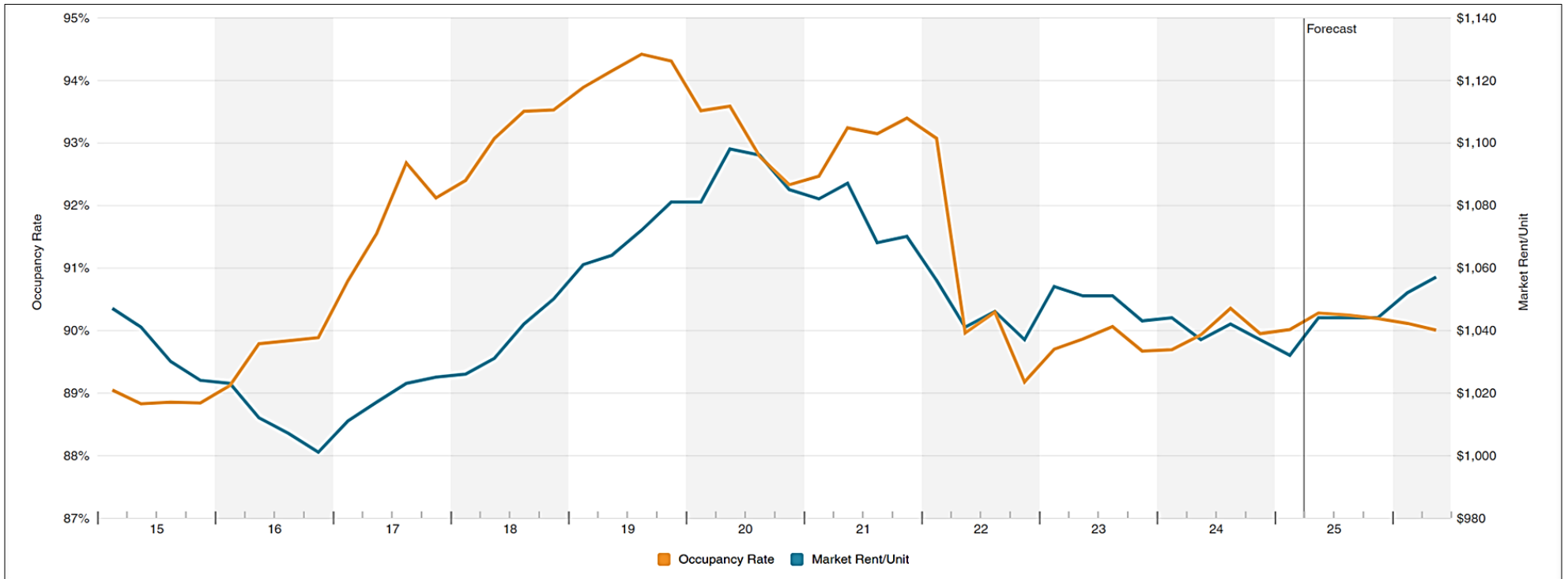


Source: CoStar, Adjusted to 2025 Inflation

Figure 83 shows occupancy and market rent per unit.

- The orange line shows occupancy, and the blue line represents market rent per unit.
- Occupancy was much higher, in the 95% and greater range at apartment complexes visited by CDS in April 2025.
- Occupancy and rent increased from 2016 to 2020.
- Occupancy decreased in 2022 and 2023 as a result of hundreds of newly built vacant units entering the market.
- As occupancy decreases due to a new supply of units, we see that rent decreases from \$1,100 to \$1,020.

Figure 83: San Angelo Multifamily Occupancy and Market Rent Per Unit, 2015 to 2025

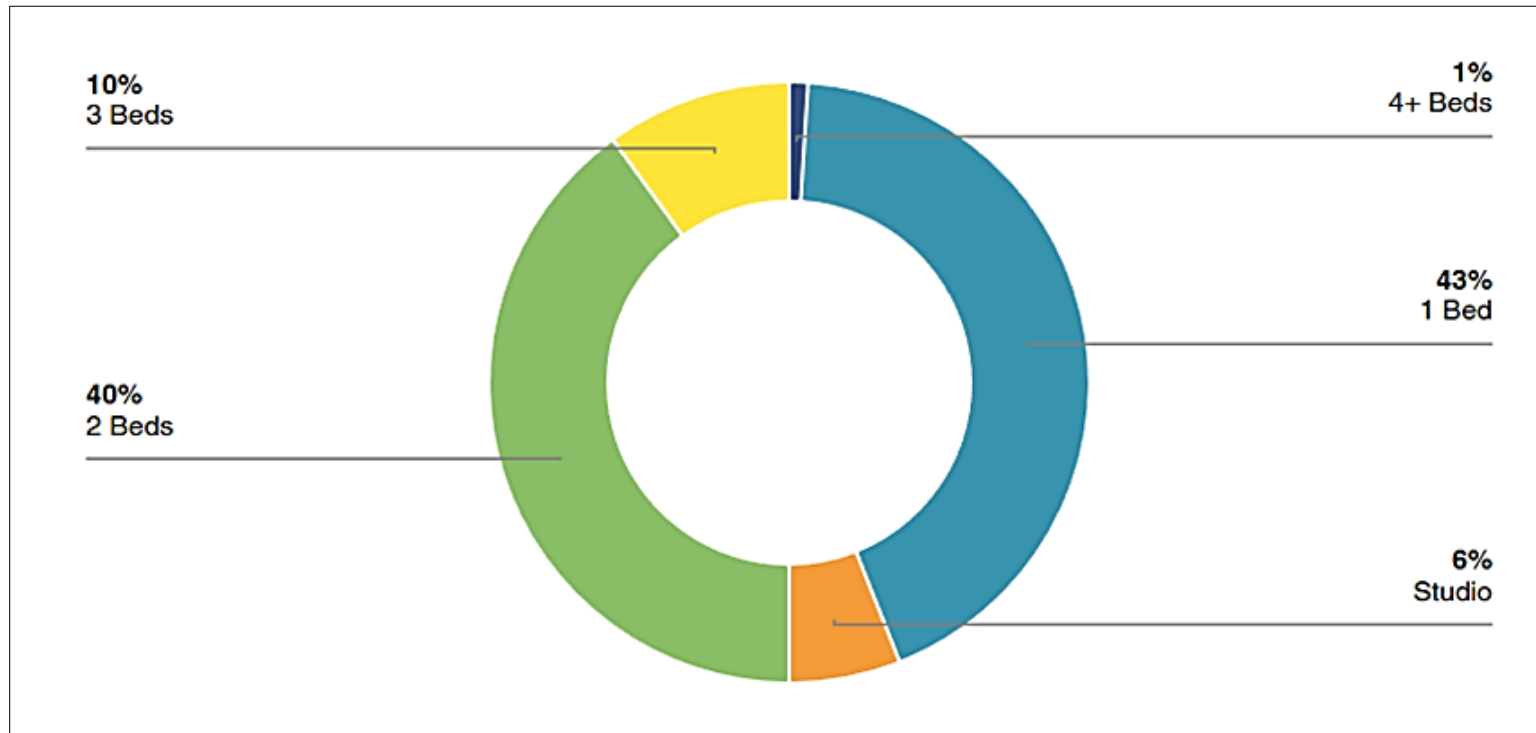


Source: CoStar, Adjusted to 2025 Inflation

Figure 84 shows the share of units by bedroom.

- 42% 1 bed
- 40% 2 beds
- 10% 3 beds

Figure 84: San Angelo Multifamily Total Units By Bedroom



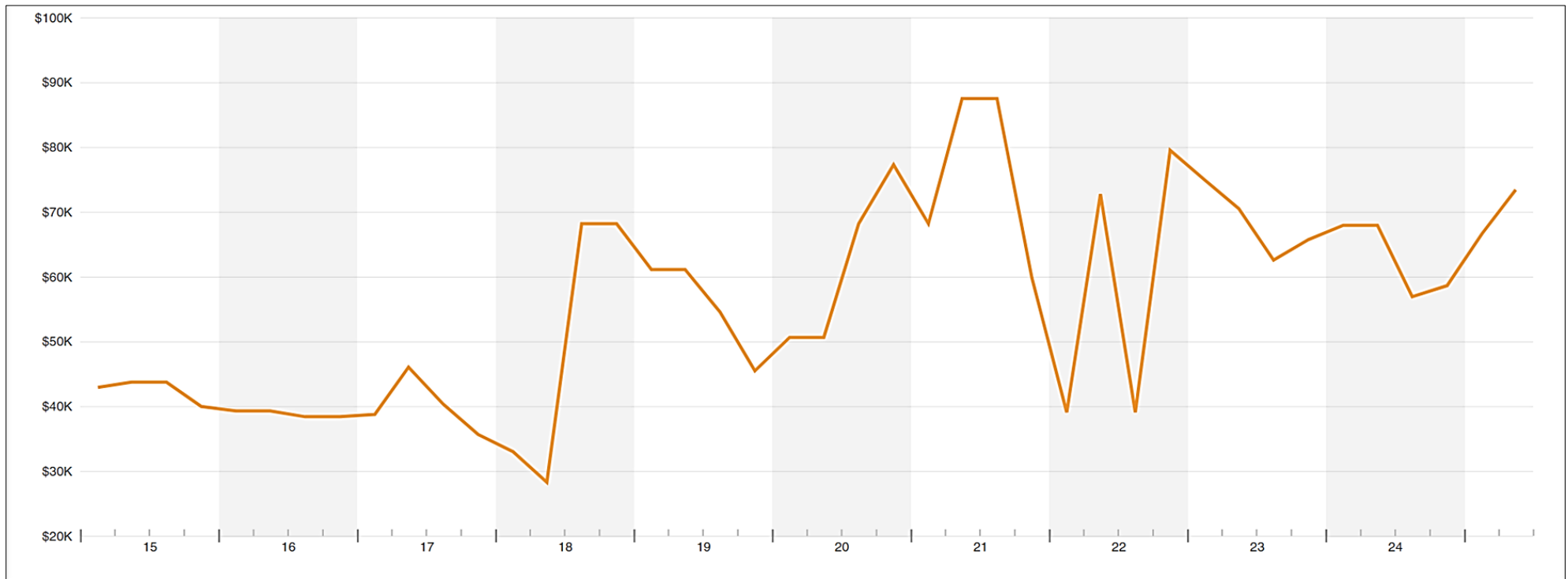
Source: CoStar, Adjusted to 2025 Inflation

Figure 85 shows asking price per unit for multifamily units in San Angelo.

This chart is helpful when gauging value per unit for investment in multifamily properties.

- The for-sale asking price per unit was around \$42,000 in 2015 and reached its peak in 2021 at \$87,500 per unit.
- As of 2Q2025 the average for-sale multifamily asking price per unit is \$73,427.

Figure 85: San Angelo Multifamily For-Sale Asking Price Per Unit, 2015 to 2025

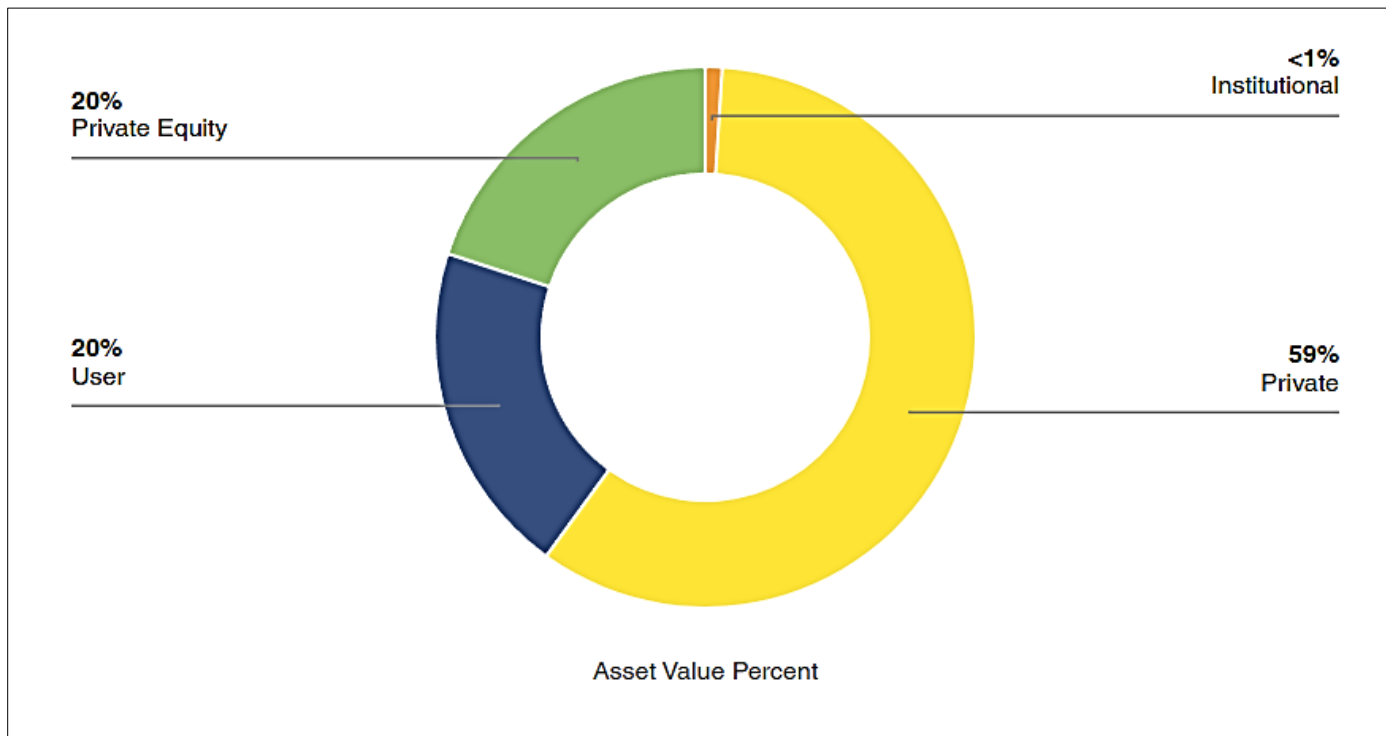


Source: CoStar, Adjusted to 2025 Inflation

Figure 86 shows ownership type of multifamily properties in San Angelo.

- Around 60% of multifamily properties in San Angelo are privately owned. This is likely an important factor in moderating San Angelo’s apartment rental rates in the face of a lack of new entry level housing construction, high interest rates and increased demand for rental units as home sales have slowed.

Figure 86: San Angelo Multifamily Asset By Owner Type



Source: CoStar, Adjusted to 2025 Inflation

Single-family Detached Rental Units

Most landlords and owners continue to apply slow, steady increases as opposed to large increases all in one renewal or new lease. There does not seem to be the level of price gouging of renters as has been seen in other parts of Texas. In some cases, depending on the home, sometimes new leases are increased in order to keep pace with updated property rental rates.

CDS believes that this is mainly due to competition from the new supply of apartments built in 2022.

Demand for single-family rental units is strong in San Angelo as a result of continued job growth, high interest rates, a low supply of newly built entry level homes and high occupancy at the most desirable market rate apartment complexes.

Popular locations for single-family rentals are the northside, eastside, numbered streets while agents and employers stated College Hills and Southland as the most desirable neighborhoods.

Table 87 shows single-family home rental prices in San Angelo at the time of this study based on size and condition.

Table 87: San Angelo Single-Family Rental Price Range

Sq. Ft.	Bed/Bath	Price Range \$
Oldest Houses/Minimal Rehabilitation*		
650-800	1/1	\$535-\$950
650-800	2/1	\$700-\$900
850-1,000	2/2	\$800-\$950
1,100-1,750	3/1 & 2	\$1,000-\$1,300
Rehabilitated Houses**		
950-1,100	1/1	\$650-\$800
1,100-1,400	2/2	\$995-\$1,300
1,500-2,200	3 & 4/2	\$1,500-\$2,300
Larger Newer Houses		
1,500-2,000	3 & 4/2	\$1,500-\$1,800
2,000-3,000	4 & 5/3	\$2,000-\$3,500

*1940s-1980s, some units accepting HUD housing vouchers.**Usually local landlords

Goodfellow Air Force Base

The base provides military employment of around 6,000. This creates a significant amount of housing demand. Personnel are given a housing allowance to pay for on or off base housing. The amount varies by personnel and rank from about \$1,383 to \$2,304 per month.

One off base housing development provides 250 rental units for base workers. However, more is needed.

The following data from GAFB outlines the Basic Allowance for Housing (BAH) for 2025.

Officer		
Rank	With Dependents	Without Dependents
O-6	\$2,304	\$2,043
O-5	\$2,286	\$1,932
O-4	\$2,193	\$1,866
O-3	\$2,058	\$1,662
O-2	\$1,752	\$1,470
O-1	\$1,548	\$1,251
O-3E	\$2,118	\$1,743
O-2E	\$2,040	\$1,611
O-1E	\$1,881	\$1,506

Enlisted		
Rank	With Dependents	Without Dependents
E-9	\$2,097	\$1,626
E-8	\$1,983	\$1,563
E-7	\$1,863	\$1,398
E-6	\$1,755	\$1,311
E-5	\$1,509	\$1,158
E-4	\$1,383	\$1,038
E-3	\$1,383	\$1,038
E-2	\$1,383	\$1,038
E-1	\$1,383	\$1,038

An estimated 2,500 personnel and their families are seeking housing off base in the City at any given point. All 25 senior officers move every two years, and much of the base is oriented to training. Therefore, many come to the base with the understanding that they are not permanent San Angelo residents. This means that most in San Angelo as a result of working or training at the base seek rental housing.

This can be problematic to the overall housing market by adding rental competition to an already tight market with low new supply historically being created as well as rising rental prices, growing population and civilian jobs.

However, many base workers stationed longer term strongly desire single-family units. It has been identified that a shortage of four-bedroom units makes locating housing for those with families difficult.

This pressure on the rental market creates competition from other renters, like healthcare, city, county, first responders, teachers, and other professionals who could potentially become permanent San Angelo residents and future home buyers.

Angelo State University

Angelo State University (ASU) is a public university within the Texas Tech University System. As of 2025, ASU reports a total enrollment of approximately 11,542 students, with an estimated 7,000 to 8,000 attending on campus and the remainder enrolled in high school dual credit and online programs.

The university offers several on-campus housing options, including traditional residence halls and apartment-style living, primarily serving underclassmen and a limited number of upperclassmen. However, due to capacity limits, a significant share of ASU students—particularly upperclassmen and graduate students—live in off-campus rental housing, contributing to rental housing demand in the local San Angelo market.

- 2,000 students living on campus per fall/spring semester
- 1,000 students living off campus in student housing apartments
- 5,000 students do not live on campus and create competition for rental units in San Angelo's apartments and single-family home rental units.

Figure 88: Downtown Housing

Roosevelt Lofts



Roosevelt Lofts





Cactus Hotel



Cactus Hotel

San Angelo Future and Planned Housing Development

Need information from city for platted / approved and proposed / future (not platted or approved yet or even submitted) multifamily and single-family development. Need to reach out to City Planning for information.



SAN ANGELO HOUSING MARKET SUMMARY

Housing demand in San Angelo is diverse and increasingly difficult to satisfy with the current housing stock.

Locally employed buyers, many of whom are current or retired military, make up a large portion of the homebuyer profile, with absentee and out-of-state buyers representing only a small share of demand.

A significant number of prospective buyers are seeking to downsize, reflecting trends of an aging population and smaller household sizes.

However, development regulations, including the large minimum lot size and zoning that prohibits accessory dwelling units, limit the production of smaller homes.

Many homebuyers and renters show strong interest in newer townhomes, garden homes, duplexes and townhouses, which often sell faster than the average listing.

Nonetheless, the available supply of infill lots for convenient development is shrinking, even as programs like the infill development credit have offered some incentive for builders.

From an employer perspective, there is a widespread belief that San Angelo's housing inventory does not meet the needs of workers across income levels.

High-wage earners are attracted to luxury, new-construction homes around Southland, while mid-level employees with families are looking for affordable, detached 3–4 bedroom homes in good condition—an option that remains scarce.

Young people and families are frequently dissuaded from purchasing existing affordable housing due to its condition or price. Employers often cite the lack of rental apartments and housing as a deterrent for new hires, especially those with families or part-time work arrangements.

Although building smaller homes presents unique challenges for local builders—such as less flexibility in floor plan diversity and slimmer budget margins—there is growing interest among some San Angelo builders in constructing on smaller lots. However, the shortage of skilled labor in construction-related trades threatens to delay progress in addressing these housing needs.

Local builders stated there are just four house framing companies operating in San Angelo.

Lastly, construction costs continue to rise significantly.

In 2020, the cost of building a home in San Angelo was estimated between \$100 and \$115 per square foot. By 2025, that figure had increased to around \$170 per square foot, adding another layer of difficulty to delivering affordable new housing.

As the price of new entry level single-family homes reach high \$200,000s to \$300,000s range, three bedroom apartment and single-family/duplex rental units have increased demand. Although the rental market appears to be balanced, rental demand is still high and has potential to increase if continued job growth from existing and incoming employers persists.

CDS believes that local economic and community development in San Angelo has proven to be effective and successful and are on track to continue facilitating new job growth.

Quantifying San Angelo Housing Demand

Table 89 shows job growth based on the 1 housing permit per 2 new jobs ratio applied to recent and future estimated job growth numbers in San Angelo and Tom Green County.

- 2022-2025 job growth created an estimated demand for 1,813 housing units.
- From 2025-2030 based on three job growth scenarios San Angelo and Tom Green County can expect housing demand to be anywhere between 1,250 to 2,500 over the next five years.

Table 89: San Angelo Housing Supply and Demand Factors

Category	Data Point	Jobs	Housing To New Jobs Ratio	Housing Demand	Rental Unit Demand (45%)	For-Sale Demand (55%)	Rent Price	For-Sale Price
Job Growth	New Jobs (2022-2025)	3,626	1:2	1,813	700	1,100	\$875-\$1,300	\$175,000-\$275,000
Future Job Growth Scenarios (2025-2030)	Conservative	2,500	1:2	1,250	563	688	\$875-\$1,300	\$175,000-\$275,000
	Average	3,500	1:2	1,750	788	963	\$875-\$1,300	\$175,000-\$275,000
	Aggressive	5,000	1:2	2,500	1,125	1,375	\$875-\$1,300	\$175,000-\$275,000

Source: QCEW, CDS

Table 90 shows employment by industry and the average annual income (based on average weekly wage for each industry) with the correlated attainable monthly rental or for-sale price.

When jobs are added in any of these industries the associated attainable rent and for-sale prices should be emphasized so that new housing units accommodate the varied incomes of new workers.

Table 90: Tom Green County Average Annual Wage By Industry and Affordable Housing Price

Industry	Employees	Avg. Annual Income	Affordable Rent Price	Affordable For-Sale Price
Health Care and Social Assistance	9,461	\$60,564	\$1,514	\$135,000
Retail Trade	6,318	\$34,447	\$861	-
Accommodation and Food Services	5,911	\$20,433	\$511	-
Educational Services	4,930	\$41,356	\$1,034	-
Manufacturing	3,974	\$63,161	\$1,579	\$140,000
Construction	2,583	\$60,662	\$1,517	\$135,000
Public Administration	2,552	\$71,393	\$1,785	\$170,000
Administrative and Support and Waste Management and Remediation Services	2,306	\$44,835	\$1,121	-
Professional, Scientific, and Technical Services	1,887	\$68,208	\$1,705	\$160,000
Wholesale Trade	1,785	\$69,433	\$1,736	\$160,000
Finance and Insurance	1,720	\$67,277	\$1,682	\$160,000
Other Services (except Public Administration)	1,514	\$36,750	\$919	-
Mining, Quarrying, and Oil and Gas Extraction	1,219	\$81,095	\$2,027	\$190,000
Transportation and Warehousing	1,003	\$64,043	\$1,601	\$140,000
Arts, Entertainment, and Recreation	763	\$24,745	\$619	-
Real Estate and Rental and Leasing	690	\$53,459	\$1,336	-
Information	588	\$69,188	\$1,730	\$160,000
Utilities	435	\$83,104	\$2,078	\$200,000
Agriculture, Forestry, Fishing and Hunting	334	\$36,211	\$905	-
Management of Companies and Enterprises	85	\$107,408	\$2,685	\$265,000
Unclassified	20	\$38,465	\$962	-

Source: QCEW, CDS

Several rules of thumb are commonly believed to indicate a balanced local housing market.

- Rental vacancy
 - A vacancy rate of around 5%-8% is considered balanced.
 - This rate indicates that there are enough available units to meet demand without causing a shortage or oversupply.
 - A balanced rental housing market typically has a vacancy rate that allows for a healthy turnover of units without causing significant rent increases or decreases.
- Months of supply
 - A balanced market is considered to have about 6 months of supply with an average of 30-60 days on market.
 - This means that if no new homes were listed for sale, it would take approximately 6 months to sell all the homes currently on the market at the current sales pace.
- New housing permits per job Housing Supply vs. Population and Job Growth - Housing Units per Job Created
 - A balanced ratio is typically 1 housing permit for every 2 jobs (NAR, Up For Growth).
 - New housing permits per 1,000 population.
- Homeowner rates
 - Balanced market: 1.5%–2.0% homeowner vacancy
 - Housing tenure mix national average is 65% owner-occupied, 35% renter-occupied (ACS); balanced markets often reflect similar ratios with local variation based on urbanization and job types.
- Price and rent stability
 - A balanced market typically has annual home price appreciation at 3%–5% per year.
 - A balanced market typically has annual rent price appreciation at 2%–4% per year.
 - A balanced market typically has a price-to-income ratio of 3 to 4 times median household income.
- Affordability metrics
 - No more than 30% of households paying more than 30% of income on housing is ideal.

- Affordable housing stock by income
 - Sufficient supply of housing units affordable at 30%, 50%, 80%, and 100%+ AMI levels.
 - Diversity in housing types helps balance supply for varying income levels and household types.
 - Balanced investor vs. owner-occupier share.
 - New housing matches trends in household size and formation.
 - Zoning allows a mix of housing types and lot sizes under 50 feet.
 - Housing and infrastructure incentives or affordability incentives are available.
 - Efficient permitting process that supports supply delivery.

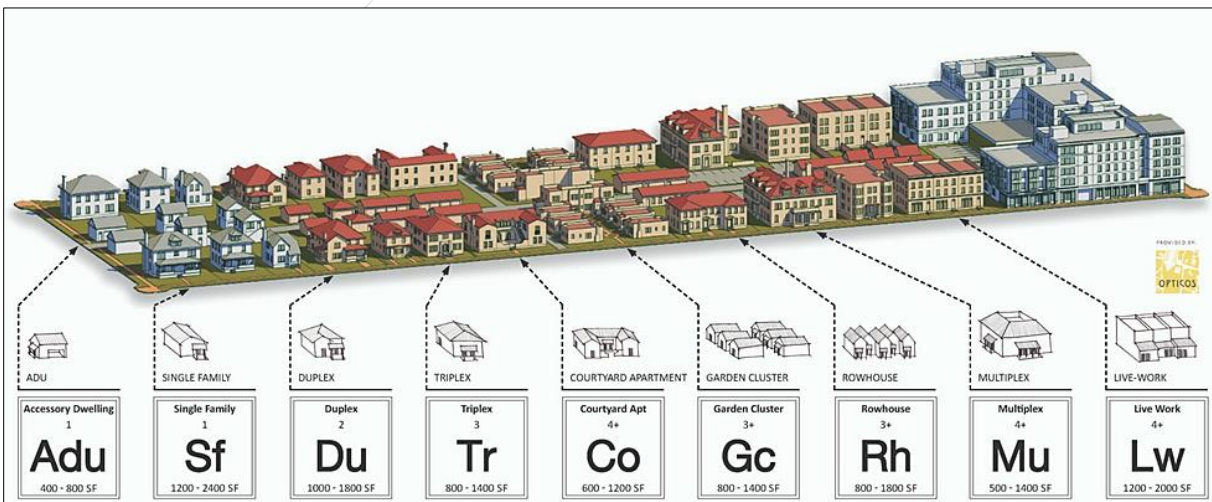
Implications for Housing Policy & Planning

- The data in this study reveals decline in attainable entry level single-family for-sale housing availability.
- The demand for entry level and first-time homes has exceeded supply and has increased demand for rental units.
- Growth in higher-priced segments suggests upward pressure on home values and a need for housing strategies by the EDC, City and other partners to help lower the final price of entry level homes by reimbursing developers for infrastructure and utility costs.
- Local non-profits, hospital and school district may own land that is underutilized or vacant that could be donated to a developer with a development agreement that new home prices there be attached to local workers making 80%-120% of the median income.
- The city may need to incentivize development of homes under \$225K to restore balance and address cost burden pressures.
- In order to provide missing-middle housing types that can rent and sell at more attainable prices to local workers, then local development and zoning regulations and requirements may need to be improved.

Potential Local Housing Market Solutions

- Minimum lot size
 - Minimum as low as 1,400-1,800 square feet lots in single-family and multifamily zones.
- Reduce setback requirements to allow homes and parcels to be closer together
- Increase building height caps, especially along corridors and thoroughfares
- Increase density (units per lot)
- Permitting time
 - Quick, efficient and consistent review, permitting and approval
- Permitting and impact fees
 - 90-day moratorium on permit and impact fees in targeted areas needing attainable housing
 - Suspend fees in areas with excess infrastructure capacity
- Building code
 - Updated standard building codes
- ADU's
 - Allow Accessory Dwelling Units in single-family zones by right
- Zoning
 - Allow small lot, two, three and four unit homes in single-family zones
 - Allow residential in industrial and commercial zones
- Parking requirements
 - Reduce or eliminate parking requirements for new residential

Allow and Approve Missing Middle Housing Types



Texas EDCs Working on Housing

CDS has provided similar housing market studies to other EDCs in Texas. Here are just a few examples of strategies those cities have pursued which have proven successful in boosting attainable new housing.

The City of Kerrville donated city owned land to a developer with a development agreement in place that the new homes built will at a price no more than 30% of gross income for households making from 80% to 120% of the area median income and used a TIRZ to reimburse up to \$27 million of infrastructure costs at a separate new subdivision.

Kerrville, TX

- Lennar – Ridgeland (130 units)
- Built 2022
- 1,034 – 1,874 square feet
- \$280,000 - \$300,000
- 80%-120% AMI
- \$1.7 million land
- Lennar – Windridge (490 units)
- TIRZ creating - \$27 million infrastructure reimbursements
- Habitat for Humanity
- 44 Units
- Missing Middle
- \$2.6 million for infrastructure



We Know Real Estate Markets

New homes coming

Rosa Lavender Oct 11, 2024



Turning the first shovels of dirt for the new Habitat for Humanity Mariposa Subdivision last Wednesday went (left to right) Habitat board president Brent Hurmer, Mayor Pro Tem Brenda Hughes, Councilmember Jeff Harris, Councilmember Delaine Siglerman, Kerr County executive director Mary Campagna, TIC president Kim Clarkson, Kevin Bernhard from JI Bernhard Construction and Mike Witter from KPUB. Clarkson, Siglerman and Bernhard are also members of the board of directors for Habitat for Humanity Kerr County.


John Lavender



The City of Sweetwater established a Municipal Development District which has allowed them to provide a host of incentives to boost the supply of new entry level homes by providing infrastructure reimbursement as well as a per home builder incentive of \$10,000 per lot.

Sweetwater, TX

- Partnered with Rick and Holly Betenbough to develop the Creekside Subdivision
- 29.5 acres
- 94 lots
- \$1.3 million incentives
- Infrastructure and construction incentives
- \$10,000 per home builder incentive



Creekside Development – Builder Incentive

SEED determined that the Creekside Subdivision will promote new or expanded business development in the City of Sweetwater pursuant to Section 505.158(a) of the Local Government Code and/or promote or develop new or expanded business enterprises in the City of Sweetwater pursuant to Section 501.103 of the Local Government Code.

Guidelines:

1. Lots will only be available for sale to home builders. If an individual wishes to purchase a lot, they will need to work with a builder of their choice and have the builder contact the SEED MDD office at 325-235-0555 for further instruction.
2. Builder must be licensed in the State of Texas to build Single-Family Homes.
3. Must be a single-family home maintained and used as a single dwelling unit containing at least 1,200 square feet of living space as shown on a floor plan that has direct access to a street or thoroughfare and shares neither a wall, roof, heating facilities, hot water equipment, nor any other essential facility or service with any other dwelling unit.
4. Home must meet all of chapter 25 and 26 of the City of Sweetwater Code of Ordinances.
5. The Developer will assign an incentive of \$10,000 per home (up to 95 homes) to the builder that purchases a lot. Once the single-family home is Ready for Sale, the builder will be authorized to request the incentive.

Process:

If you are a builder and are interested in purchasing a lot, contact SEED staff at (325) 235-0555.

Payments:


Once the home is completed and Ready for Sale, meaning the home has been issued either a certificate of occupancy or another equivalent final walk-through approved by the City of Sweetwater, the developer will be entitled to the \$10,000.00 payment within 21 days after it has been requested.

We Know Real Estate Markets

The City of Borger EDC purchased 25 lots and utilized TIRZ funds to provide infrastructure reimbursement to boost the production of new entry level homes as well as an infill program.

Borger, TX

- Yucca Park Estates
- EDC purchased lots
- 25 units
- Built 2024
- 7:12 Homes (Amarillo)
- Incentives for contractors
- TIRZ infill housing support program and reimbursement grants for downtown building improvements



Borger Economic Development Corporation breaks ground on new housing development

IN YOUR COMMUNITY

BORGER EDC BREAKS GROUND ON NEW HOUSING DEVELOPMENT

5:03 | 92°

1-800-PLUMBER STOCKS Xcel Energy, Inc. 53.77 ▼ -0.02

By Madison Fisher
Published: Jun. 14, 2024 at 5:40 PM CDT

BORGER, Texas (KFDA) - The Borger Economic Development Corporation broke ground on a new housing development called Yucca Park Estates to help boost its economy.

"Currently our population has shrunk, and so what that does, it also creates an inventory problem. So when our industries and our businesses are able to create workplaces, they have a hard time because they have nowhere to live," said Borger EDC Executive Director...

We Know Real Estate Markets

The Brownwood EDC shared their CDS ResIntel housing study to developers in the region and state and were able to attract a developer who built 3 new market rate rental projects ranging from 40-123 units.

This helped lower the prices of older apartment and single-family homes that were small and outdated and were charging higher rent than their conditions would otherwise allow due to lack of competition/new rental unit supply.

Brownwood, TX



- Bear Creek Townhomes – 61 Units
- Indian Creek Townhomes – 123 units
- Longhorn Townhomes – 41 units
- Built late 2017
- 613 – 1,100 square feet
- \$895 - \$1,450 per month
- Developer – Andy Hansen (Stephenville)
- teachers, police, nurses, business managers/professionals
- College students, administrators, coaches, a few retirees

Incentive Toolbox

Texas Local Government Code Chapter 505, Section 505.153 for Type B Corporations authorizes spending on Projects related to affordable housing

“Projects related to affordable housing - For purposes of this chapter, "project" includes land, buildings, equipment, facilities, and improvements found by the board of directors to be required or suitable for the promotion of development and expansion of affordable housing, as described by 42 U.S.C. Section 12745”

EDC’s around Texas like Borger, Sweetwater, Brownwood, San Angelo and Kerrville have helped lower costs and produce more housing by donating land, reimbursing infrastructure costs to developers, and providing per lot incentives to builders.

Table 91 contains potential incentives to help absorb the cost of new housing development in San Angelo along with corresponding Texas State Statute Code followed by purpose, usage and public revenue source.

Table 91: Incentive Toolbox

Incentive	State Statute Code	Purpose	Usage	Public Revenue Source
Tax Increment Financing (TIF) or Tax Increment Reinvestment Zones (TIRZ)	Texas Tax Code, Chapter 311	Captures future increases in property tax revenues within a designated area (TIF District) to pay for infrastructure improvements or development costs.	Frequently used to incentivize large-scale redevelopment projects and urban renewal.	Incremental property tax revenues generated by increased property values in the TIF/TIRZ area. Sales tax TIRZs' use a share of new sales tax with no additional tax levied.
Public Improvement Districts (PID)	Texas Local Government Code, Chapter 372	Allows developers or property owners to fund infrastructure improvements by levying special assessments on property within the district	Commonly used for mixed-use developments, residential subdivisions, and commercial projects.	Special assessments in addition to property taxes on property owners and occupants within the PID boundary created by City.
Chapter 380 Agreements	Texas Local Government Code, Chapter 380	Allows cities to provide grants, loans, or reimbursements to developers for infrastructure, public improvements, or other development costs.	Often used for retail, office, and mixed-use projects. Reimbursements can be tied to sales taxes, property taxes, or other performance metrics.	General fund of the city or county, which may come from property taxes, sales taxes, or other general revenues.

Incentive	State Statute Code	Purpose	Usage	Public Revenue Source
Chapter 381 Agreements	Texas Local Government Code, Chapter 381	Allows counties to provide incentives similar to Chapter 380 agreements, including tax abatements or reimbursements for public improvements or job creation.	Primarily used in unincorporated areas or in projects where county-level participation is essential.	General fund of the city or county, which may come from property taxes, sales taxes, or other general revenues.
Economic Development Sales Tax (Type A and Type B Funds)	Texas Local Government Code, Chapters 504 and 505	Allows cities with a Type A or Type B EDC to use a portion of local sales taxes to fund economic development projects, infrastructure improvements, and business recruitment.	Type A funds are typically used for industrial and manufacturing projects, while Type B can be used for a broader range of purposes, including quality-of-life projects.	Local sales tax revenue collected from voters' approval of a dedicated economic development sales tax (up to 0.5%).
Municipal Management Districts (MMD)	Texas Local Government Code, Chapter 375	MMDs are created at the State level and allow the levying of taxes, fees, or assessments to fund services and infrastructure in a commercial area.	Funds operation and maintenance and small capital projects and function similar to PIDs, but are created by the state, not City.	Bonds, property taxes or special assessments in addition to property tax from commercial property owners within the district.
Property Tax Abatements	Texas Tax Code, Chapter 312	Temporarily reduces or eliminates property taxes for businesses or developers making significant capital investments or creating jobs.	Commonly used to attract industrial, commercial, and manufacturing projects.	Foregone future property taxes (i.e., revenue not collected) in exchange for investment.
Texas Leverage Fund (TLF)	Texas Government Code, Chapter 2303	Provides financing to cities with an EDC funded by local sales tax for economic development projects.	Can be used to finance infrastructure, land acquisition, and other development-related costs.	Funds come from the portion of the local sales tax collected by cities specifically earmarked for economic development.
Low-Income Housing Tax Credit (LIHTC)	Texas Government Code, Chapter 2306	Programs such as the Low-Income Housing Tax Credit (LIHTC) provide tax incentives to developers building affordable housing.	Primarily for residential developments that include affordable housing units.	Federal tax credits or state/federal grants.

Incentive	State Statute Code	Purpose	Usage	Public Revenue Source
Municipal Utility District	Texas Water Code, Chapter 54	Provides water, sewage, drainage, and other utility services in areas where municipal services are not available.	Often used to support residential, commercial, and industrial development by ensuring access to necessary utilities.	Funded through property taxes, bond sales, and utility fees collected within the district in addition to City taxes.
Cultural Arts District	Texas Government Code, Chapter 442	Encourages the development of cultural arts areas to promote tourism, cultural engagement, and local economies.	Incentivizes art installations, galleries, theaters, and public spaces that attract visitors and stimulate economic growth.	Funded through state grants, local sales taxes, tourism taxes, and private contributions.
Neighborhood Empowerment Zones	Texas Local Government Code, Chapter 378	Provides economic incentives to encourage development and improvement in designated neighborhoods.	Can offer tax abatements, fee waivers, and other incentives for property owners and developers to invest in targeted areas.	Primarily funded through local property tax abatements and fee reductions.
Tax Exempt Qualified Non-Profit Bonds	Texas Government Code, Chapter 1371	Allows non-profit organizations to issue tax-exempt bonds for financing public-benefit projects, such as affordable housing and health facilities.	Provides lower-cost financing to non-profit developers for qualifying public-benefit projects.	Supported by private investors who purchase the tax-exempt bonds, with potential local or state tax-exempt status.
Public Benefit Corporation	Texas Business Organizations Code, Title 1, Chapter 22	A special type of corporation designed to produce a public benefit while operating profitably.	Used by companies whose goals align with social or community-oriented objectives, such as environmental or community development.	Funded by private capital, grants, and potentially tax incentives if the public benefit aligns with government goals.

Source: Texas Economic Development Handbook

Economic Impact of New Housing

The main goal of this market study is to promote increasing the amount of workers living in San Angelo in order to increase local wealth by mitigating sales and property tax revenue leakage resulting from San Angelo workers living outside of San Angelo and Tom Green County.

The following information provides data on the economic impact of building new homes. This data is from a 2015 study conducted by the National Association of Home Builders.

Total One-Year Impact: Sum of Phase I and Phase II:

Local Income	Local Business Owners' Income	Local Wages and Salaries	Local Taxes ¹	Local Jobs Supported
\$28,670,800	\$8,606,200	\$20,064,700	\$3,358,600	394

Phase I: Direct and Indirect Impact of Construction Activity:

Local Income	Business Owners' Income	Local Wages and Salaries	Local Taxes ³	Local Jobs Supported
\$19,204,100	\$6,526,800	\$12,677,400	\$2,152,500	237

Phase II: Induced (Ripple) Effect of Spending the Income and Taxes from Phase I:

Local Income	Business Owners' Income	Local Wages and Salaries	Local Taxes ¹	Local Jobs Supported
\$9,466,700	\$2,079,400	\$7,387,300	\$1,206,100	157

Phase III: Ongoing, Annual Effect that Occurs When New Homes are Occupied:

Local Income	Local Business Owners' Income	Local Wages and Salaries	Local Taxes ¹	Local Jobs Supported
\$4,091,900	\$922,400	\$3,169,900	\$1,014,800	69

³ The term local taxes is used as a shorthand for local government revenue from all sources: taxes, fees, fines, revenue from government-owned enterprises, etc.

Source: National Association of Home Builders

Impact of Building 100 Single-Family Homes: Typical Local Area



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Total One-Year Impact: Sum of Phase I and Phase II:

Local Income	Local Business Owners' Income	Local Wages and Salaries	Local Taxes ¹	Local Jobs Supported
\$11,693,000	\$3,620,500	\$8,072,300	\$2,211,200	161

Phase I: Direct and Indirect Impact of Construction Activity:

Local Income	Business Owners' Income	Local Wages and Salaries	Local Taxes ¹	Local Jobs Supported
\$7,403,300	\$2,750,500	\$4,652,700	\$1,699,600	90

Phase II: Induced (Ripple) Effect of Spending the Income and Taxes from Phase I:

Local Income	Business Owners' Income	Local Wages and Salaries	Local Taxes ¹	Local Jobs Supported
\$4,289,700	\$870,000	\$3,419,600	\$511,600	71

Phase III: Ongoing, Annual Effect that Occurs When New Homes are Occupied:

Local Income	Local Business Owners' Income	Local Wages and Salaries	Local Taxes ¹	Local Jobs Supported
\$2,640,600	\$623,200	\$2,016,900	\$503,500	44

¹ The term local taxes is used as a shorthand for local government revenue from all sources: taxes, fees, fines, revenue from government-owned enterprises, etc.

Source: National Association of Home Builders

Total One-Year Impact: Sum of Phase I and Phase II:

Local Income	Local Business Owners' Income	Local Wages and Salaries	Local Taxes ¹	Local Jobs Supported
\$840,800	\$254,800	\$585,500	\$70,700	11.5

Phase I: Direct and Indirect Impact of Construction Activity:

Local Income	Business Owners' Income	Local Wages and Salaries	Local Taxes ⁵	Local Jobs Supported
\$577,200	\$194,500	\$382,400	\$36,000	7.2

Phase II: Induced (Ripple) Effect of Spending the Income and Taxes from Phase I:

Local Income	Business Owners' Income	Local Wages and Salaries	Local Taxes ¹	Local Jobs Supported
\$263,600	\$60,300	\$203,100	\$34,700	4.4

Phase III: Ongoing, Annual Effect that Occurs When New Homes are Occupied:

Residential Property Taxes
\$11,200

⁵ The term local taxes is used as a shorthand for local government revenue from all sources: taxes, fees, fines, revenue from government-owned enterprises, etc.

Source: National Association of Home Builders

Impact of Building 100 Apartments: Typical Local Area



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Impact of \$1 Million Spent on Residential Remodeling in a Typical Local Area



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1001 South Dairy Ashford Street, Suite 450

Houston, TX 77077

281-582-0855

www.cdsmr.com