DRAFT

NCTCOG Regional TOD Progress Report

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AI Acknowledgment: This Regional TOD Progress Report was developed by NCTCOG staff. AI assisted with brainstorming ideas, identifying potential resources, and providing additional insights into the TOD data measures.

INTRODUCTION

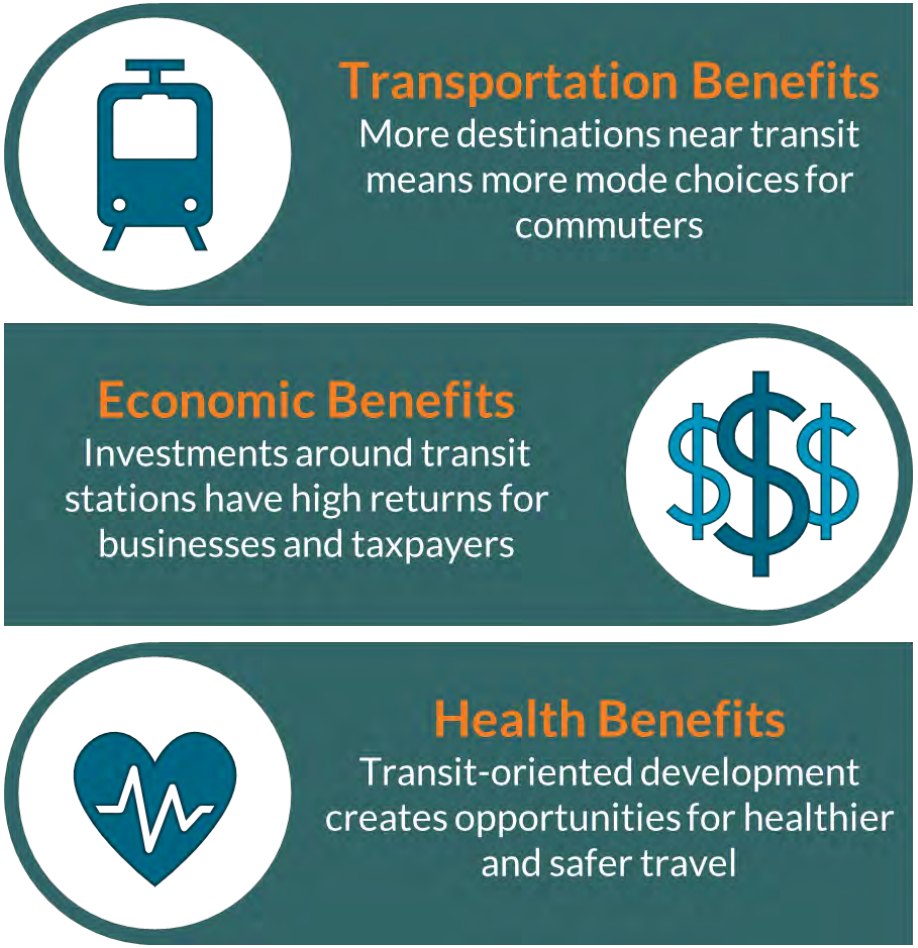
Introduction

What is TOD?

Transit-Oriented Development (TOD) is development that encourages pedestrian activity with a mix of higher density employment, housing, and commercial land uses within a half-mile walking distance of a passenger rail station. It should include a well-designed, accessible built environment and connected network of bike and pedestrian facilities. This is a key strategy supported by the North Central Texas Council of Governments (NCTCOG) to improve transportation and sustainable regional growth. TOD expands opportunities to bike or walk in combination with transit that can reduce automobile dependence.

Why is TOD Important to North Texas?

North Texas' population is projected to reach over 12 million people by 2050. As the region continues to rapidly grow, the urgency to meet everyday demands like jobs, healthcare, healthy food, and education, becomes more critical. TODs can provide more commuting capacity combined with housing options to ease traffic, improve air quality, and help with other rapid growth challenges.



INTRODUCTION

TOD Goals

Updated goals for TOD informed by Mobility 2050 and Transit 2.0 (Task 6) have been concisely grouped into three measurable goals.

1. **Economic development** – The station areas need more opportunities through growth in density at the stations.
2. **Walkability** – Station areas should be safe and convenient for walking to and from the station.
3. **Ridership** – TOD should support increased rail and overall transit ridership.

Purpose of the TOD Status Report

This report has four general purposes:

Advance TOD: North Texas needs to continue and increase TOD efforts to address regional growth.

Clarify TOD needs: This report will use granular data to clarify Transit 2.0 Task 6 recommendations and focus on TOD items most in need of regional focus.

Resources for implementation: Local partners can see in this report what elements of TOD are most needed at each station based on observed data.

Encourage local partners: The data-driven measures provide targets for shared regional implementation.

INTRODUCTION

Overview of the Regional TOD Status Report

This report takes the key issues that were highlighted in Transit 2.0 for TOD and recommends a measurement framework for evaluating TOD areas. For this report, **North Texas TOD Areas** refers to the net statistical area of the Region's 89 rail transit stations.

As shown in **Figure 1**, the report divides the TOD data measures into three overarching categories: Performance, Informative, and Action. Each category contains specific data measures with associated data sources. A full table of the data sources in the report can be found in the Appendices.

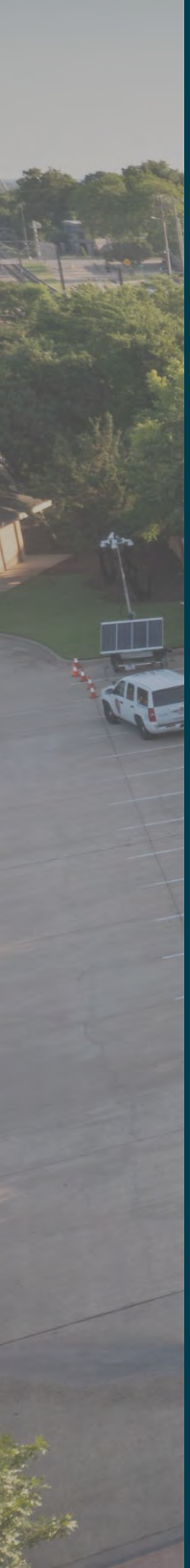
Figure 1: Overview of the Report

Performance Measures

The first step in determining the status of TOD in the region is identifying key performance data measures. These measures indicate outcomes towards our TOD goals. While these measures can be influenced by many factors in and out of local government control, the performance measures most closely align with our TOD goals and involve data variables that can be tracked to show progress. This report will use the best information available to NCTCOG to provide insights into these measures, indicating progress towards effective TOD in North Texas.

To coincide with the goals of TOD, the performance data measures are separated into three categories:

- Economic Development
- Walking Commute Mode
- Rail Transit Ridership



ECONOMIC DEVELOPMENT

Economic Development

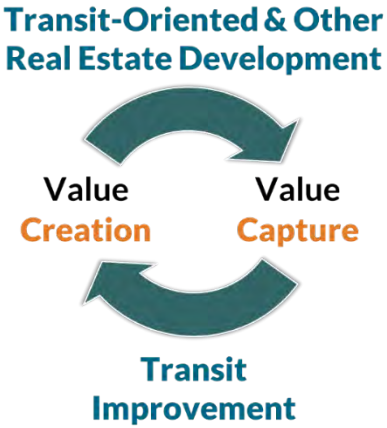
Creating economic development with sustainable value for North Texas is a primary goal of TOD. In conjunction with other value capture strategies, TOD has the potential to generate sustainable, long-term revenue streams that can help repay debt used to finance the upfront cost of building transportation infrastructure as well as fund the operations and maintenance costs of transit systems as conceptually illustrated in **Figure 2.**[1]

Economic development is also about expanding the capacity of individuals and firms to engage in economic activity. TOD does this by increasing the travel choices and options for people and businesses near stations. To measure this expansion in economic capacity, NCTCOG staff analyzed data on the Regional TOD Inventory, urban density, and jobs to examine whether each show both increasing value creation and economic activity opportunities near stations.

Three Measures of Economic Development in the TOD Report

1. TOD Inventory – show market for building TOD and development interest in station area
2. Population, Housing, and Building Density
3. Jobs

Figure 2: Value Capture and Value Creation Feedback Loop



[1] https://www.transit.dot.gov/valuecapture

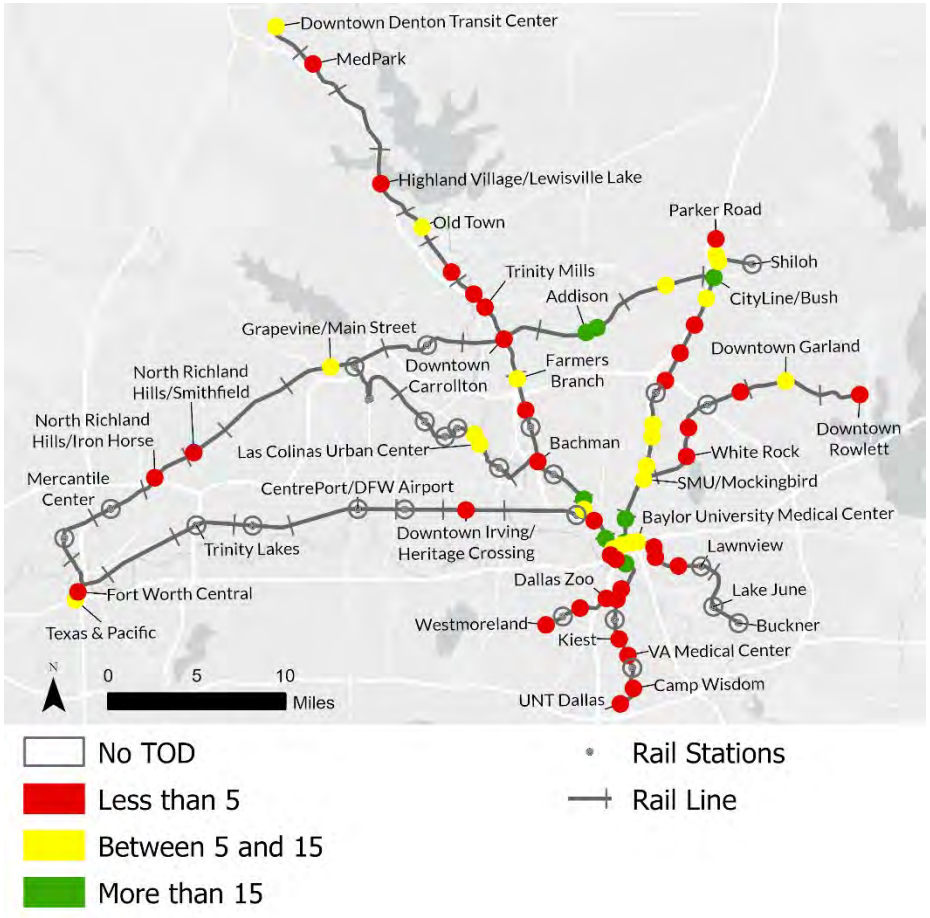
ECONOMIC DEVELOPMENT

NCTCOG Regional TOD Inventory

The Regional TOD Inventory is a database of built and under construction TOD projects across Dallas Area Rapid Transit (DART), Trinity Metro, and Denton County Transportation Authority (DCTA) rail transit stations identified by NCTCOG staff. A detailed description of the 2024 Regional TOD Inventory update and methods can be found on the NCTCOG website under TOD Data Products.

The inventory acknowledges not all TODs are of ideal design. TODs were evaluated using a standard TOD design criteria developed from a summary of national transit-oriented and pedestrian-oriented design guidelines, including Pedestrian and Transit-Oriented Design[2] and the ITDP TOD Design Standard.[3] Developments were evaluated and assigned separate scores of 1, 2, or 3 for each of the seven criterion, combining to provide a "TOD Score" where a value of 21 would indicate a development meeting the national criteria definition.

Figure 3: Number of TOD per Station Area



[2] Bartholomew, K., Ewing, R. H. (2013). Pedestrian- & Transit-oriented Design. United States: Urban Land Institute.
[3] Institute for Transportation & Development Policy. (2017) ITDP TOD Standard. 3rd ed. https://www.itdp.org/publication/tod-standard/

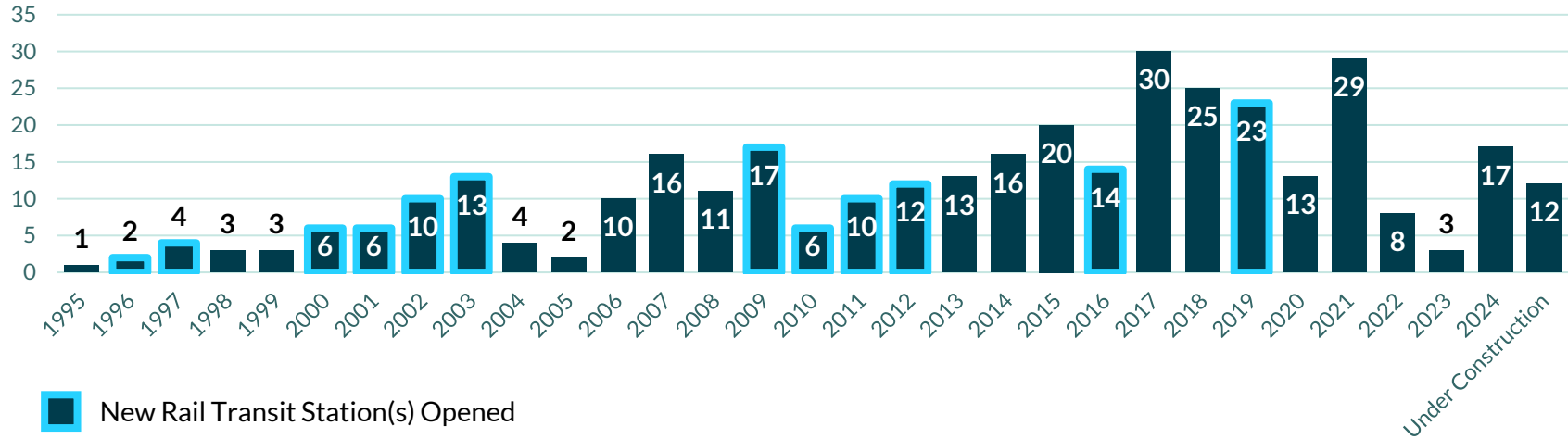
ECONOMIC DEVELOPMENT

Findings

Within a half mile of the region's 89 existing rail stations (excluding Dallas-Fort Worth International Airport terminal stations), 359 sites qualified as TOD based on the location, building age, density, and form criteria. Following staff evaluation, 52 of the qualifying TODs met all standard national TOD design criteria. The Regional TOD Inventory Summary Report has a complete list of all TODs and their respective scores. Shown in **Figure 3**, These TODs are unevenly distributed across the region's rail stations with one-quarter of the stations having **no TOD**.

The number of completed TODs has steadily increased since 1995 as the rail transit system in North Texas has expanded as shown in **Figure 4**. Between 2021 and 2024, 57 sites were built with 29 of these developments occurring in 2021. While the COVID-19 Pandemic may have contributed to the sharp decline in TOD construction from 2022 to 2023, it is gradually returning to pre-pandemic growth with 17 sites completed in 2024 and more under construction.

Figure 4: Number of Completed TODs in North Texas per Year



ECONOMIC DEVELOPMENT

Population, Housing, and Building Density

Population, housing, business and job densities play a significant role in economic growth and productivity. The more people and places congregated in a designated area, the more economic activity will likely occur. Higher densities, especially around transit, could generate value that, in turn, could be reinvested into the station area.

Additionally, increasing density can support more transit users. According to DART, the "right" density varies by context, but as a general rule minimum residential densities can range from seven units per acre for bus-based TOD to 30 units per acre or more for rail-based TOD.[4] Similarly, in a recent report titled *Transit-Supportive Density in Greater Boston* by TransitMatters and Boston Indicators, a density of at least 30 people per acre are needed to support transit.[5]

To improve measurement accuracy, NCTCOG staff used 30x30-meter grid cell data from the NCTCOG Demographic Forecast for population density and parcel-level data for housing and building densities. Relying on American Community Survey (ACS) Block Group data, a common source, to estimate density can lead to an overestimation since some Census Block Groups extend beyond the station area half mile and ACS total population numbers are less reliable at small geographies. It is important to note that extensive manual editing was performed on the parcel data, including merging parcels to ensure accuracy.

[4] https://dartorgcmsblob.dart.org/prod/docs/default-source/tod-docs/darttodguidelines2020.pdf?sfvrsn=a7b59dc9_5
[5] https://www.bostonindicators.org/-/media/indicators/boston-indicators-reports/report-files/transit-supportive-density-report-2025_01_30.pdf

ECONOMIC DEVELOPMENT

Findings

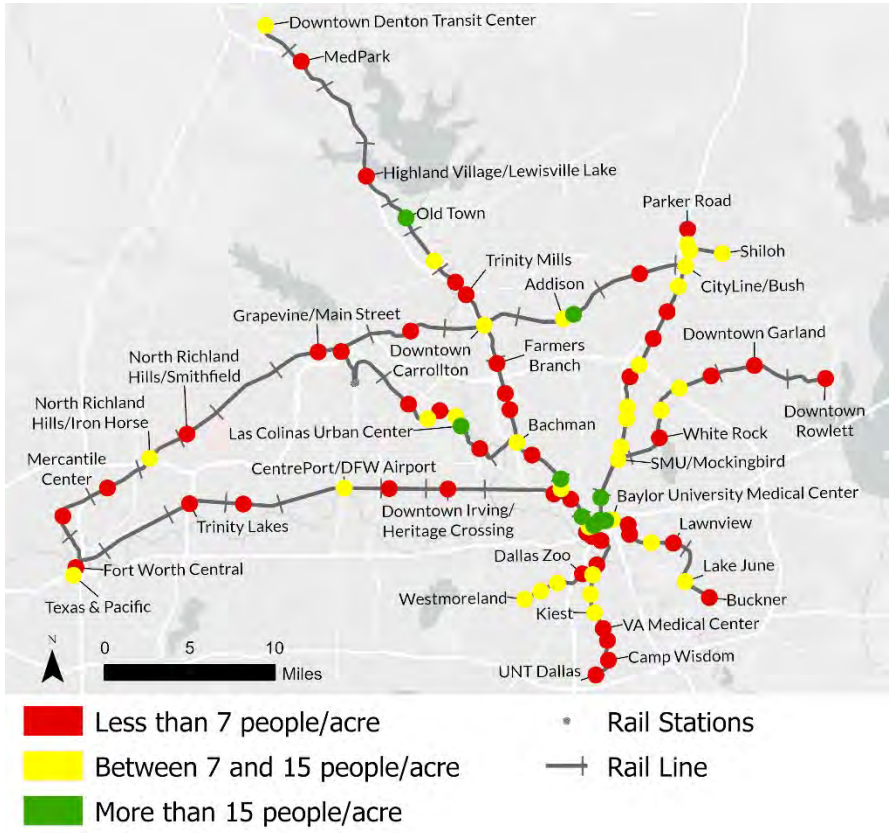
Table 1 compares density statistics between the North Texas TOD area and the Region. North Texas TOD areas have a low residential density compared to a national standard of 30 units per acre. Shown in **Figure 5**, more than 80 percent of station areas in North Texas have an average residential density of less than 15 people per acre. Additionally, there are **no stations** with a population density over 25 people per acre.

The TOD areas also have a low commercial building density. More than 50 percent of station areas have an estimated commercial building density less than 10,000 square feet, or roughly three casual dining restaurants,[8] per acre.

Table 1: Density Statistics

	North Texas TOD Areas	North Texas Region
Estimated Total Population	293,617	8,578,654[6]
Estimated Population Density	7	1.5
Estimated Total Housing Units	248,130	3,172,287[7]
Estimated Housing Unit Density	6	0.5
Estimated Commercial Building Density	8,336	

Figure 5: Population Distribution



[6] https://rdc.dfwmaps.com/pdfs/2025%20NCTCOG%20Population%20Estimates%20Publication.pdf
[7] https://censusreporter.org/profiles/31000US19100-dallas-fort-worth-arlington-tx-metro-area/
[8] https://pos.toasttab.com/blog/on-the-line/average-restaurant-square-footage

ECONOMIC DEVELOPMENT

Jobs

Jobs are frequently seen as a driver of economic growth and are a key indicator of economic stability. As the quantity and quality of goods and services produced increases, businesses often expand and hire more employees to meet growing demand.[9] When more people have jobs, it leads to increased consumer spending and helps contribute to economic growth.

At the station level, jobs can provide insight into economic stability around rail transit stations. Locations with lower employment and "weaker" economies could be negatively impacted as businesses identify expansion opportunities away from station areas. Not only does this impact economic development potential, but it also impacts ridership since commute mode choices are often determined by where the job is located.

The Regional TOD Report uses the NCTCOG 2050 Demographic forecast[10] prepared for Mobility 2050.[11] Out of that data the forecast year of 2026 is evaluated at 30x30-meter grid cell level only available to NCTCOG staff. This allows jobs estimates to precisely fit the station area half mile radius.

[9] https://ourworldindata.org/economic-growth
[10] https://rdc.dfwmaps.com/pdfs/NCTCOG%202050%20Forecast%20Methodology.pdf
[11] https://data-nctcoggis.hub.arcgis.com/datasets/NCTCOGGIS::2050-nctcog-demographic-forecast-taz-1/about

ECONOMIC DEVELOPMENT

Findings

The North Texas TOD areas have a high proportion of jobs across a small geographic area. Jobs in TOD areas account for about one-seventh of the estimated total jobs in North Texas. Additionally, approximately 10 percent of the region's major employers are located within a half mile to a rail station. See **Table 2** for job statistics.

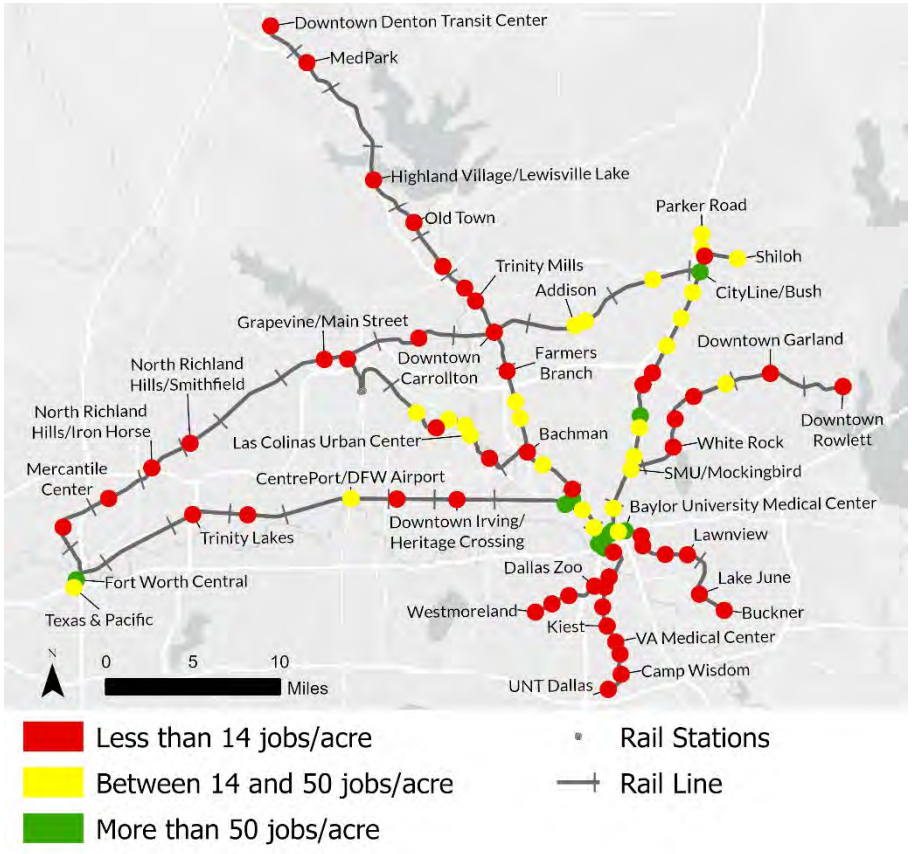
However, job density is primarily isolated to Downtown Dallas. **Figure 6** shows the distribution of jobs around North Texas TOD areas. There is low job density across most station areas in North Texas. Approximately 65 percent of station areas have less than 14 jobs per acre.

Table 2: Job Statistics

	North Texas TOD Areas	North Texas Region
Estimated Total Jobs	795,575	5,878,017
Estimated Average Jobs per Station Area	10,406	
Estimated Job Density (Jobs per Acre)	14 per Acre	< 1 per Acre
Estimated Number of Major Employers*	700	6,917
Average Number of Major Employers per Station Area	13	

**Major Employers are classified as employers with more than 100 employees*

Figure 6: Job Distribution



WALKING

Walking

Increasing the amount of walking within station areas is another primary goal of TOD. Successful TOD is intended to be dense, walkable, mixed-use development near transit, attracting people and creating vibrant, connected communities.[12] By encouraging individuals to use alternative modes of transportation for travel, TOD can promote more active lifestyles, improved air quality, and congestion relief.

NCTCOG does not have ideal comprehensive data on all walking trips in North Texas rail station areas. Such data would be expensive and technically challenging to collect. This report will use the best available alternative data sources for walking.

Two data sources for walking in the TOD report:

1. ACS Commute Mode Split - Census American Community Survey commute mode choice
2. NCTCOG Regional On-board Transit survey rider reported first/last mile mode for rail transit trips

[12] https://www.transit.dot.gov/TOD

WALKING

ACS Commute Mode Split

Station area commute mode choice offers insight into how many individuals in North Texas TOD areas choose walking and other modes for travel for work. However, ACS commuting data is isolated to solely work trips and excludes all other purposes for traveling.

Here, the use of transit commute will be included with the walking statistics as we can assume transit commuters walked as part of their commute.

The station area commute mode data surrounding the rail transit stations was collected from Census ACS 2020-2024: Means of Transportation to Work data table. This Census data is based on asking people what mode of travel they typically use to get to work. The data was isolated to block groups intersecting the half-mile buffer radius around each station; see the demographics section of this report for more details. When interpreting Census data for TOD, be aware Census geographies do not closely match a half-mile radius, and lower density areas may include data over a mile from the station.

WALKING

Findings

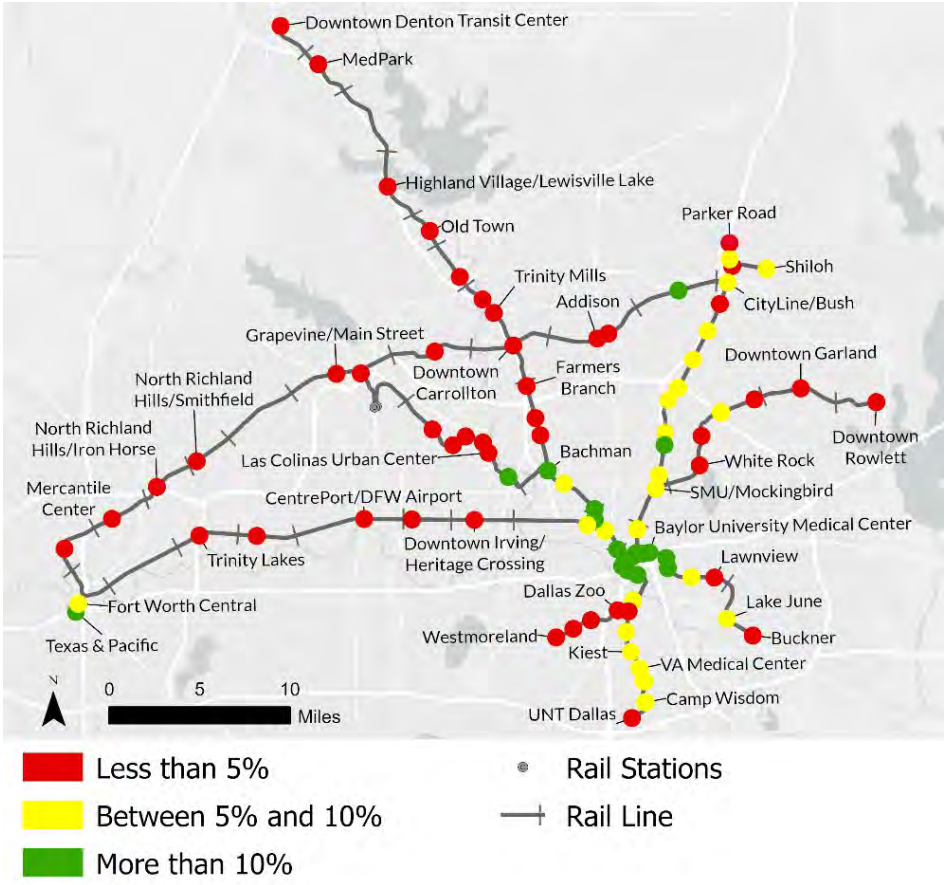
TOD residents in North Texas areas are more likely to use public transportation or walk for their commutes. Still less than five percent of TOD residents report walking, biking or using transit to get to work. **Table 3** compares the total commute mode split between TOD areas and the region.

Figure 7 depicts the differences across station areas for the percentage of non-car-dependent commutes, excluding work from home. Likely due to the design and form of downtown central business districts (CBD), residents in downtown Dallas stations are more likely to have non-car-dependent commutes. However, over half the stations in North Texas have a proportion of non-car-dependent commutes less than the North Texas TOD areas' average of five percent.

Table 3: Commute Mode Split Statistics

	North Texas TOD Areas	North Texas Region
Drove Alone	66%	69%
Carpooled	10%	10%
Public Transportation	2%	1%
Walked	3%	1%
Bicycled	0%	0%
Other Modes	2%	1%
Worked from Home	18%	18%

Figure 7: Walking, Biking, and Public Transit Commutes Across Station Areas in North Texas



WALKING

Rail Transit First/Last Mile Trips

As previously indicated, while ACS commute data can tell us about all residents near rail stations, it does not cover non-work trips, or the breakdown of first/last mile mode of travel for those who do use transit. Using data from the 2022-2023 North Central Texas Regional Transit On-Board Survey, a better estimate of the walking context around rail stations can be determined. This performance measure will only use one data point from the much larger 2022-2023 Transit On-Board Survey. For more information on the survey, visit the NCTCOG website: https://www.nctcog.org/trans/data/info/travel-surveys.

For the report, data from the 2022-2023 Transit On-Board Survey was isolated to transit trips where the passenger either boarded or alighted from a rail transit station. Stations under construction along the DART Silver Line do not have 2022-2023 Transit On-Board Survey data since this rail corridor was not operational during the survey collection period.

WALKING

Findings

Passengers using the region's rail transit system are most likely walking to or from stations. Additionally, as **Figure 8** shows, a large portion of rail transit riders transfer to or from another mode of transit, such as a bus or ride share. Few riders are driving alone for first/last mile travel.

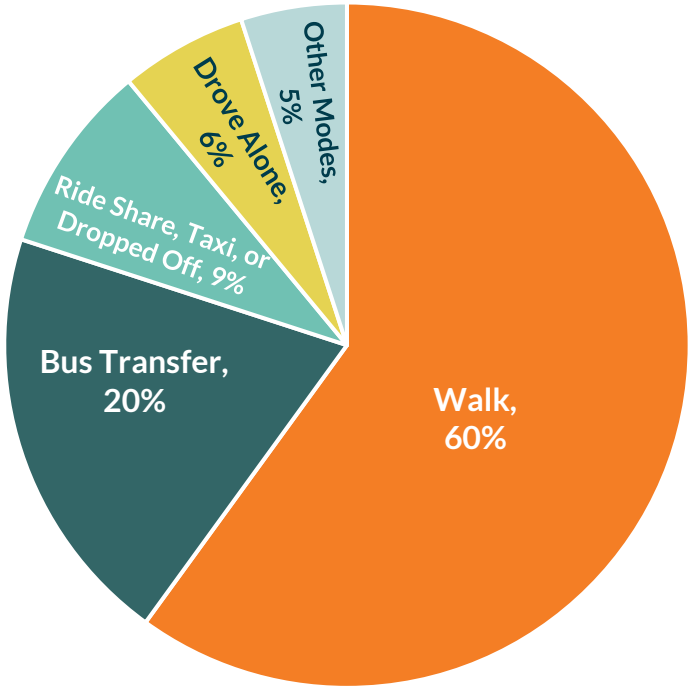
Riders are more likely to walk if the station does not have parking. However, walking trips still represent most of the first/last mile travel for approximately 35 percent of stations with available parking.

Table 4 shows walking times for first/last mile walk trips. Rail transit riders walking for first/last mile travel are likely going to or coming from a location near the station. Few riders are going to or coming from locations that are far distances from the station.

Table 4: Walk Time for First/Last Mile to Transit

5 Minutes or Less	53%
6-10 Minutes	25%
11-20 Minutes	16%
21-30 Minutes	5%
More than 30 Minutes	2%

Figure 8: First/Last Mile Travel for Rail Transit Trips



RAIL TRANSIT RIDERSHIP

Ridership

A final primary goal often associated with TOD is increasing transit ridership. A core concept of TOD is to create a well-designed, accessible built environment near transit where individuals can live, work, and recreate. Successful TOD that congregates dense, walkable, mixed-use developments at stations and along transit corridors has the potential to create more ridership.

Across the Region, ridership drastically decreased in 2019 with the COVID-19 pandemic. Because of the significant impact of the pandemic, this report only examines post-pandemic ridership from Fiscal Year 2021 (FY21) to Fiscal Year 2024 (FY24).

Data source for ridership in the TOD report:

1. Average Weekday and Weekend Ridership obtained from DART, Trinity Metro, and DCTA

RAIL TRANSIT RIDERSHIP

Findings

Figure 9 shows the regional station area averages for weekday and weekend daily ridership from FY21 to FY24. Overall, rail transit has been steadily improving post pandemic. However, year-over-year ridership growth has slowed as seen in **Figure 10**. A detailed table with average weekday and weekend ridership per station from FY21 to FY24 can be found in **Appendix 4.**

Across the region's stations, ridership varies significantly and remains relatively low. Only about one-quarter of the stations have an average weekly ridership above 1,000. **Figure 11** shows the distribution of average weekday ridership for FY24 across station areas and **Table 5** lists the rail transit stations with the highest and lowest average weekday ridership for FY24.

Figure 9: Average Daily Station Ridership FY21- FY24

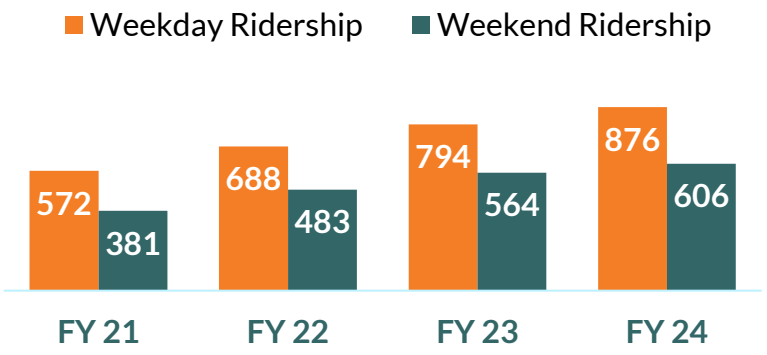
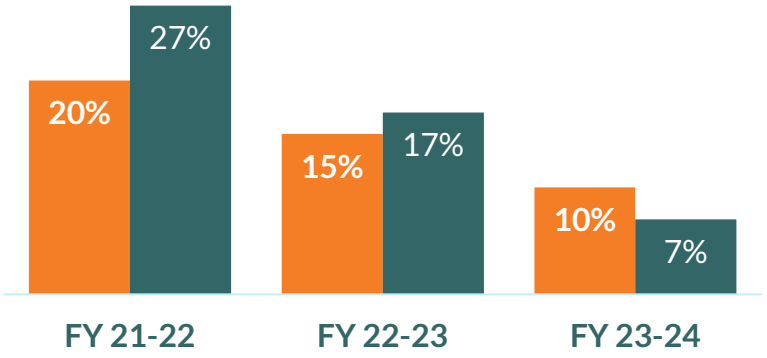


Figure 10: Year-over-year Percent Change



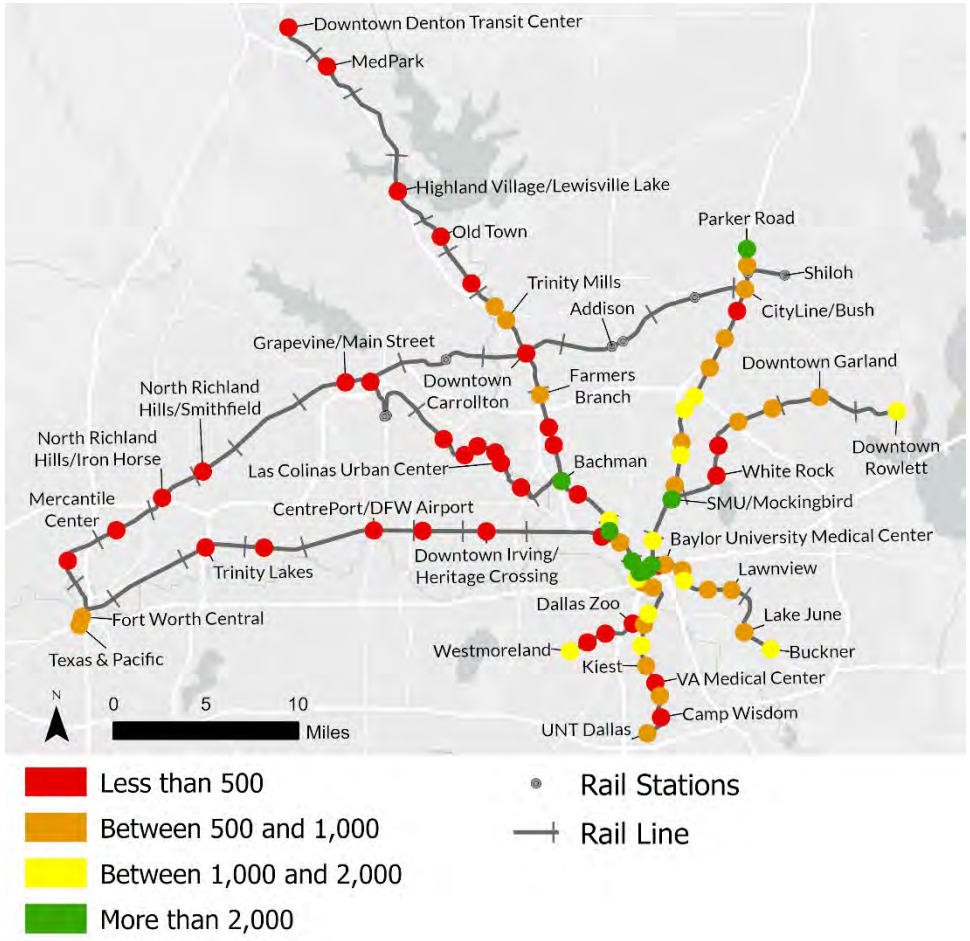
RAIL TRANSIT RIDERSHIP

Table 5: Stations with Highest and Lowest Average Weekday Ridership for FY24

TOP 5	
West End	6,529
Pearl/Arts District	4,247
Akard	3,456
St. Paul	3,035
Bachman	2,111

BOTTOM 5	
MedPark	99
Hebron	83
Old Town	67
Highland Village / Lewisville Lake	48
DFW North	34

Figure 11: FY 24 Average Daily Weekday Ridership



Informative Measures

Another step towards determining the status of TOD in the region is examining informative measures. Informative measures provide context to help explain outcomes of the performance measures. These measures do not necessarily have clear ideal values or directions and are not directly actionable by local governments. However, they are important because they have an influence on TOD performance measures. Many informative or contextual measures can impact the TOD performance measures; however, this report focuses on select station area related measures most available to NCTCOG.

For the Regional TOD Progress Report, NCTCOG has identified three overarching categories for the informative measures:

- Demographics
- Land Use
- Transit Trip Purpose & Destinations

DEMOGRAPHICS

Demographics

Population, household, and housing statistics provide informative insight into the unique characteristics of each station area.

The demographic data surrounding the rail transit stations were collected at the block group level from Census ACS 2020-2024 survey and NCTCOG Fair Access in Communities Tool (FACT) intersecting the half-mile buffer radius around each station. See **Table 6** for the specific data tables used. A complete methodology on demographic data collection and synthesis can be found in **Appendix 5**.

Due to Census recommendations on not using total population counts for small geographies and spatial mismatch of those geographies and the station area half-mile radius, this report will use the NCTCOG Demographic Forecast for population totals and the NCTCOG TOD parcel data for housing totals. All other statistics representing measures of central tendency (mean, median, mode) and percentages will come from the Census ACS. See **Appendix 1** for a list of data sources.

Table 6: Summary of the ACS 2020-2024 Data Tables and NCTCOG FACT Data

ACS 2020-2024 Data Tables	
Data Table	**Description**
B01002	Median Age by Sex
B08301	Means of Transportation to Work
B11001	Household Type (Including Living Alone) [Including Margin of Error]
B15003	Education Attainment for the Population 25 Years and Over
B19013	Median Household Income in the Past 12 Months (in 2023 Inflation-Adjusted Dollars)
B25002	Occupancy Status
B25003	Tenure
B25010	Average Household Size of Occupied Housing Units by Tenure
B25024	Units in Structure
B25064	Median Gross Rent (Dollars)
B25077	Median Value (Dollars)
NCTCOG FACT	
Description	**Data Used**
Minority Population	Percent Minority Population
Zero Car Households	Percent Zero Car Households

DEMOGRAPHICS

Population Statistics

The estimated total population in North Texas TOD areas accounts for approximately three percent of the North Texas region's total population. These TOD areas likely have more minorities. Like the region, most individuals in TOD areas have a high school diploma while less than half have at least a bachelor's degree as listed in **Table 7**.

Table 7: Station Area Population Statistics

	North Texas TOD Areas	North Texas Region
Estimated Total Population*	293,617	8,578,654[13]
Estimated Average Population per Station Area*	3,902	
Estimated Median Age	36	36
Percentage: High School graduate or higher	80%	88%
Percentage: Bachelor's degree or higher	41%	40%
Percentage: Total Minority **	69%	56%
**NCTCOG Demographic Forecast* ***NCTCOG FACT data*		

[13] https://rdc.dfwmaps.com/pdfs/2025%20NCTCOG%20Population%20Estimates%20Publication.pdf

DEMOGRAPHICS

Household Statistics

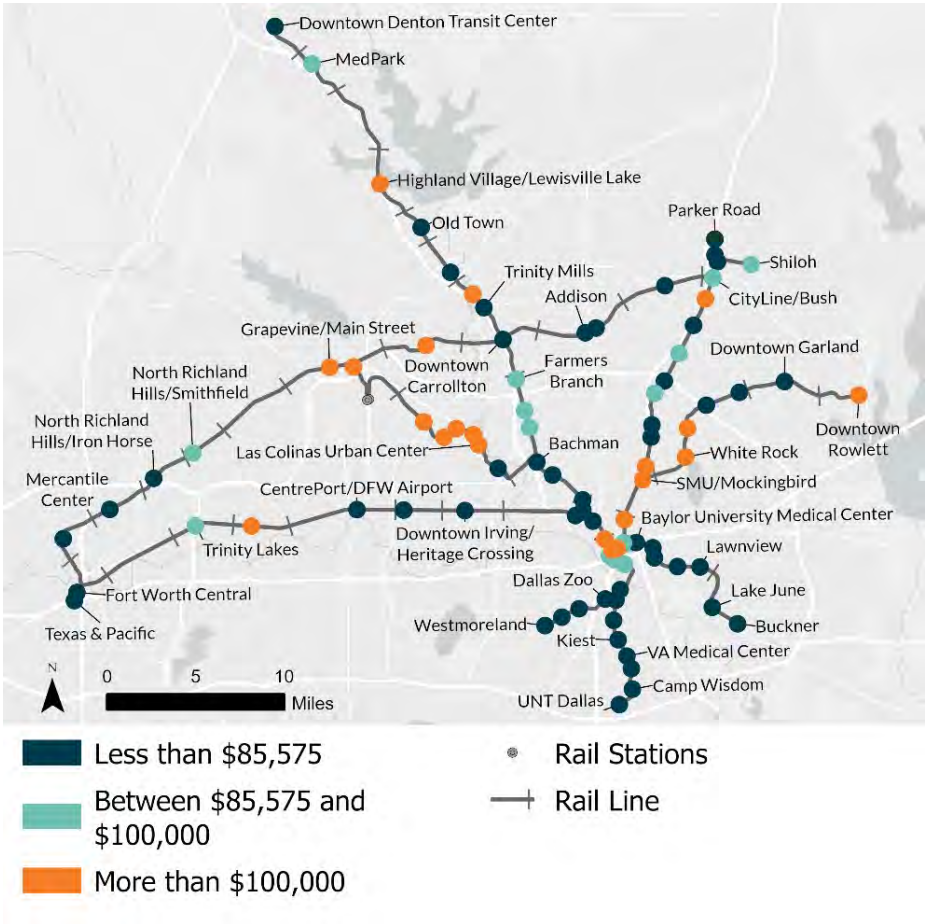
A larger proportion of North Texas TOD area households are individuals living alone. Yet, families in North Texas TOD areas are only slightly smaller than the regional average. See **Table 8** for household statistics.

Households in North Texas TOD areas have slightly lower incomes. The estimated median household income across TOD areas is $85,575 which is lower than the region's estimated median household income of $89,718. **Figure 12** maps the average median household income for each station. The average median household income varies from station to station; however, about half the station areas have an average median household income less than the North Texas regional average.

Table 8: Station Area Household Statistics

	North Texas TOD Areas	North Texas Region
Average Household Size	2.5	2.7
Percentage: Householder Living Alone	40%	27%
Estimated Median Household Income	$85,575	$89,718
Percentage: Zero Car Households*	8%	2%
**NCTCOG FACT data*		

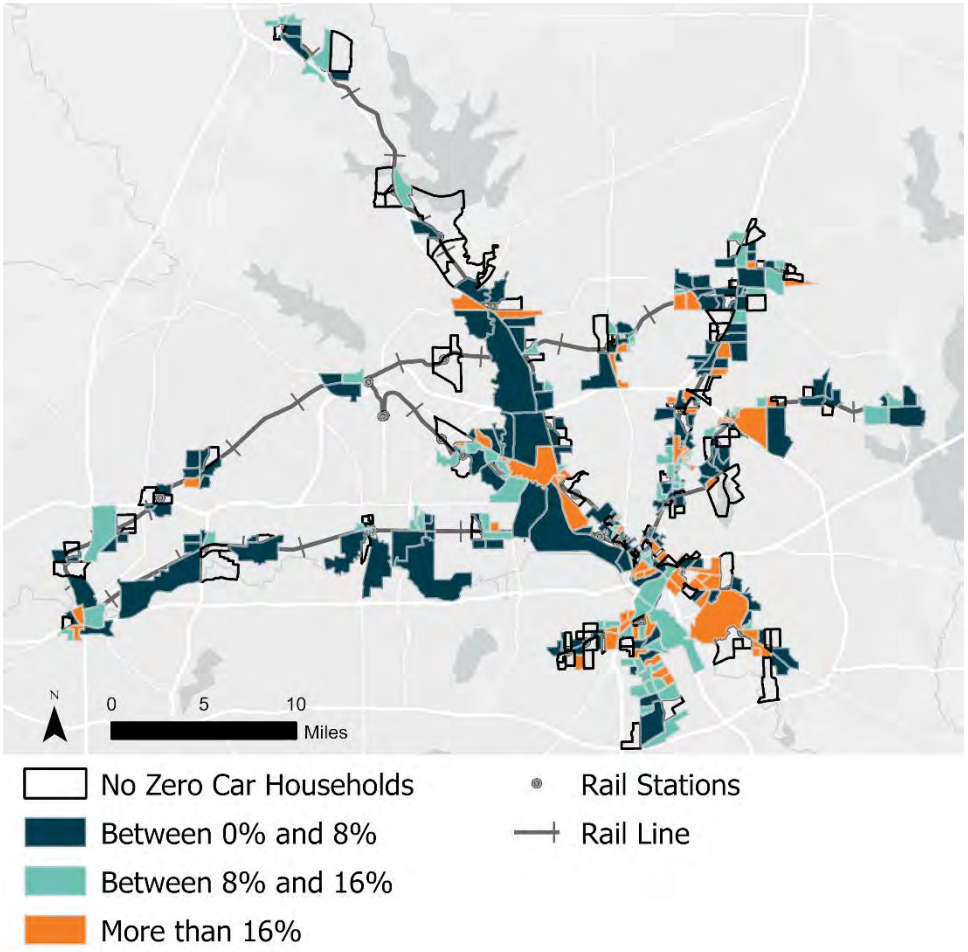
Figure 12: Distribution of Median Household Income Across Station Areas



DEMOGRAPHICS

Households in North Texas TOD areas also have less access to personal vehicles. As **Figure 13** shows, block groups at the station level vary in their distribution of zero car households. While most station areas contain households without personal vehicles, over 29 percent of the block groups in TOD areas have **NO** zero car households.

Figure 13: Spread of Zero Car Households Across Station Areas



DEMOGRAPHICS

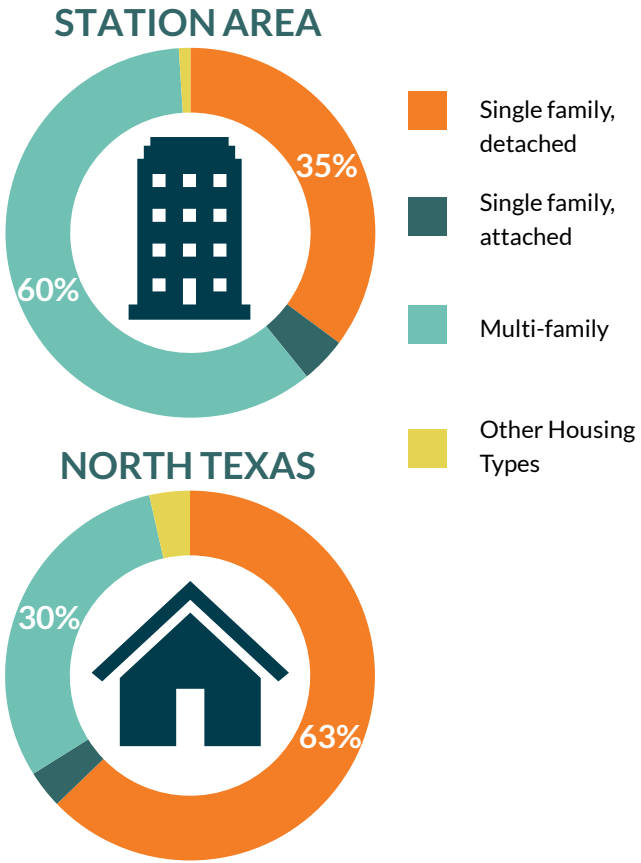
Housing Statistics

The estimated total number of housing units in North Texas TOD areas accounts for approximately seven percent of the estimated total housing units in the region, shown in **Table 9**. **Figure 14** shows the proportion of different housing types between TOD areas and North Texas region. North Texas TOD areas have more multi-family units. However, the average station still has roughly two-fifths single family, detached, housing. Even though single family, attached, housing is a denser alternative, this housing type represents a small proportion in both the region and TOD areas.

Table 9: Station Area Housing Statistics

	North Texas TOD Areas	North Texas Region
Estimated Total Housing Units*	248,130	3,172,287[14]
Estimated Average Housing Units per Station Area	2,788	
Estimated Median Gross Rent ($)	$1,666	$1,739
Estimated Median Home Value ($)	$371,881	$385,554
Percentage: Renter-Occupied Units	60%	40%
Percentage: Vacant	9%	7%
**NCTCOG TOD Parcel data*		

Figure 14: Comparison of Housing Types Between Station Areas and North Texas

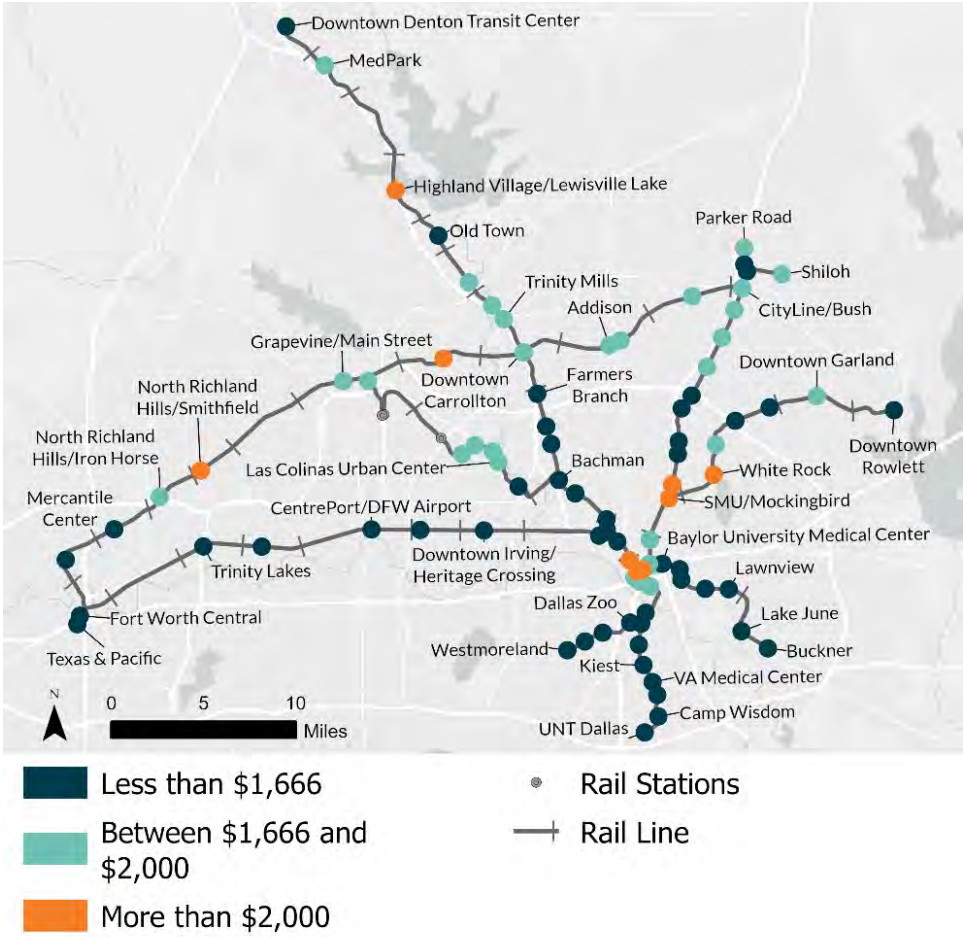


[14] Dallas-Fort Worth-Arlington, TX Metro Area - Profile data - Census Reporter

DEMOGRAPHICS

Apartments and homes in North Texas TOD areas are slightly more affordable. Across TOD areas, roughly half of the station areas have estimated median gross rent lower than the North Texas Region. **Figure 15** shows the distribution of median gross rent near rail transit stations across North Texas. Additionally, half of the station areas have an estimated median home value lower than the North Texas region.

Figure 15: Median Gross Rent



LAND USE

Land Use

Land use can influence regional travel patterns and demand on the transportation system. Transportation systems connect land uses and provide access to development.[15] Understanding the land uses within the North Texas TOD area can provide insight into how land is being used, especially regarding vacant and low-density land uses. The insights gained can help inform planning decisions such as changing the zoning, updating the development code, and performing planning studies.

To measure land use across the North Texas TOD area, staff used the NCTCOG 2020 Land Use Inventory. The NCTCOG Land Use Inventory is a point-in-time inventory of land conditions within the NCTCOG region and helps inform urban growth simulation and demographic forecasting modeling.[16]

For the report, the land use layer was modified to account for changes in development between 2020 and 2025. Staff used news reports and other sources to identify where new development has occurred since 2020. Additionally, staff cross-referenced the land use layer with Google Maps and Street View to adjust for other slight changes in land use. Finally, the "mixed-use" land use was dropped from the 2020 layer but has been restored in the TOD report.

This report also includes "roadways" as a land use however this was not part of the NCTCOG 2020 Land Use Inventory. It was created here by totaling the land area of all other land uses and subtracting it from the net land area of the half-mile radius to capture the roads between land parcels.

Disclaimer: *NCTCOG makes no guarantee regarding complete accuracy as land use may change frequently.*

[15] https://www.nctcog.org/trans/plan/lumo/land-use
[16] https://rdc.dfwmaps.com/MethodologyDocs/NCTCOG%202020%20Land%20Use%20Description.pdf

LAND USE

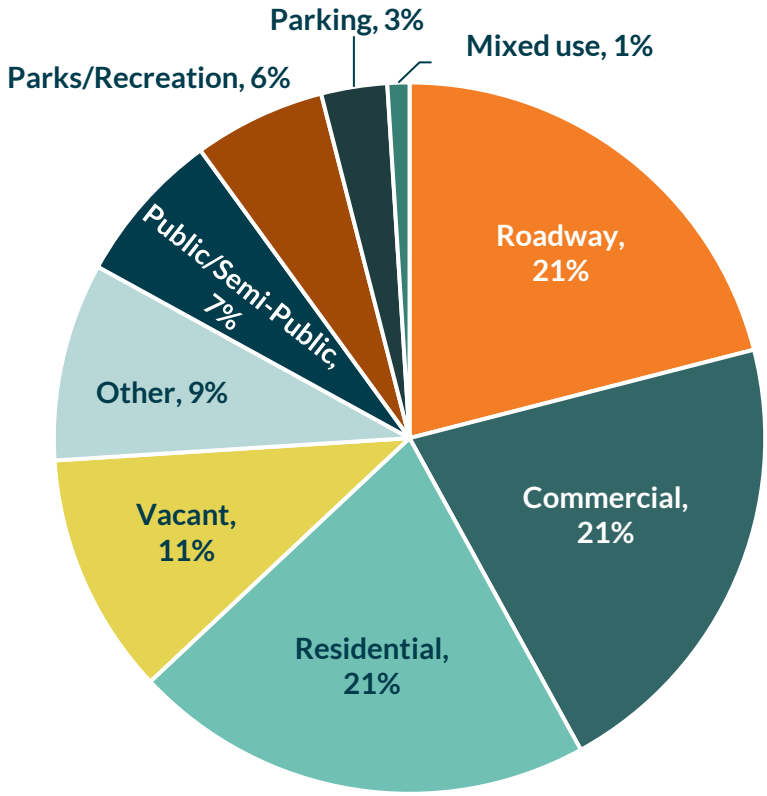
NCTCOG Land Use

As shown in **Table 10** and **Figure 16**, roadways account for approximately one-fifth of land within the North Texas TOD areas. Of the remaining "developable" area, most is categorized by commercial or residential land uses. Single family is the most prominent of all residential land uses while industrial accounts for nearly half of the commercial acreage. Approximately one-tenth of the North Texas TOD parcel area remains vacant or undeveloped.

Table 10: Land Use Distribution

	North Texas TOD Areas
Roadway	21%
Single family	14%
Vacant	11%
Industrial	9%
Other Land Uses	9%
Multi-family	7%
Office	6%
Parks/recreation	6%
Retail	5%
Institutional/semi-public	4%
Parking	3%
Education	2%
Hotel/motel	1%
Mixed-use	1%
Venue	Less than 1%

Figure 16: Generalized Land Use Distribution across the North Texas TOD Area



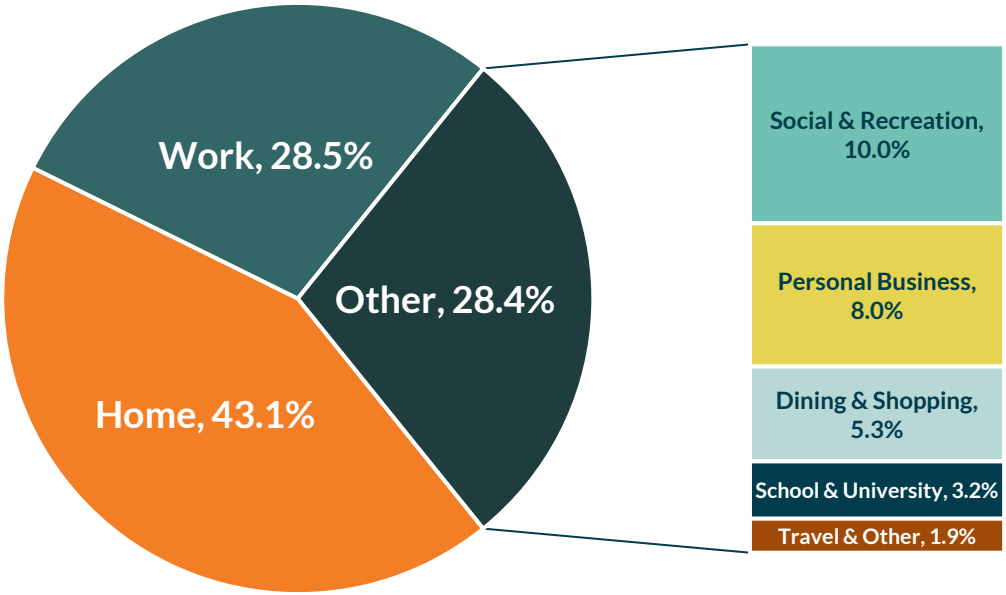
TRANSIT TRIP PURPOSE & DESTINATIONS

Transit Trip Purpose & Destinations

The 2022-2023 NCTCOG Transit On-Board Survey[17] provides information on the transit trip purpose and origin-destination locations for rail transit riders. Information on trip purpose and location helps evaluate why rail transit riders are traveling and where these transit riders are going to or coming from.

In North Texas, rail transit riders are just as likely to travel for work as they are for other purposes. However, most transit riders are using transit to travel to or from their home. The distribution of rail transit trips across different trip types is shown in **Figure 17**.

Figure 17: Trip Purpose Distribution



[17] https://www.nctcog.org/trans/data/info/travel-surveys

TRANSIT TRIP PURPOSE & DESTINATIONS

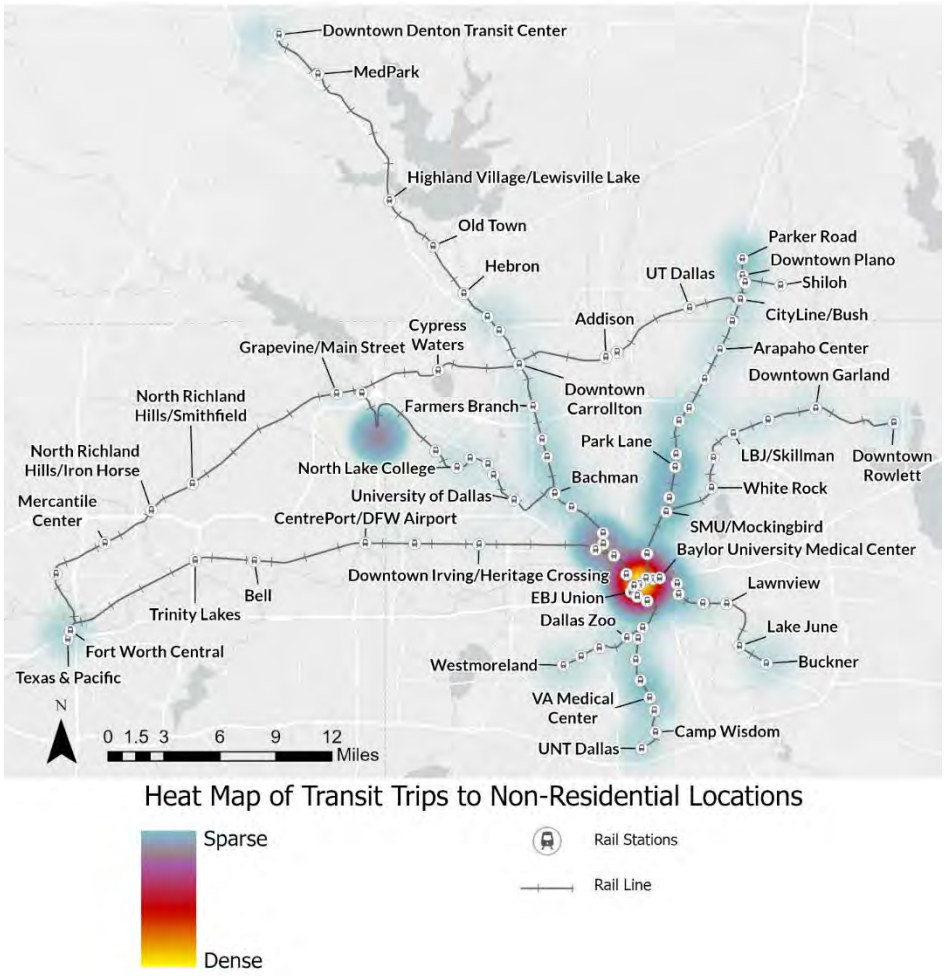
Across all trip types, approximately 60 percent of rail transit trips are to locations within a half mile of stations. Shown in **Table 11**, rail transit riders traveling for work or other purposes typically stay within the station area. However, home locations for transit riders are often outside of station areas.

Rail transit riders in North Texas are most likely traveling to downtown Dallas. As **Figure 18** shows, trips to non-residential locations are densest in downtown Dallas. Fewer trips were to locations outside of the Dallas CBD.

Table 11: Station Area Transit Trip Locations

	Trips: Inside Station Area	Trips: Outside Station Area
Home	43%	57%
Work	72%	28%
Social & Recreation	72%	28%
Personal Business	76%	24%
Dining & Shopping	74%	26%
School & University	61%	39%
Travel	50%	50%
Other	100%	0%
All Trip Types	59.4%	40.6%

Figure 18: Transit Trips to Non-Residential Locations

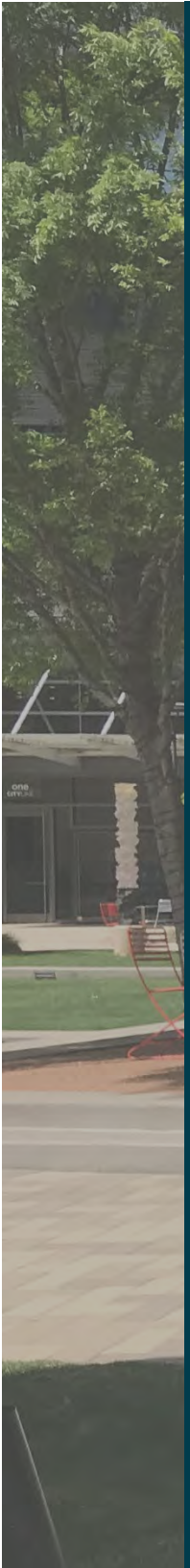


Action Measures

The most relevant TOD measures for local governments are action measures. Here the term “local governments” include transit agencies. Action measures indicate the extent and need of local government efforts towards increasing TOD in North Texas. These measures are directly under the control of local governments to change or create. Additionally, these measures have influence on our TOD performance measures. For the Regional TOD Progress Report, the action measures will serve as basis for recommendations to partner agencies and local governments.

For the Regional TOD Progress Report, NCTCOG has identified three overarching categories for the action measures:

- Planning & Zoning
- Active Transportation Infrastructure
- Partnerships & Incentives



PLANNING & ZONING

Planning & Zoning

As previously indicated, goals of TOD include increasing economic development within station areas, encouraging more non-car-dependent travel, and increasing rail transit ridership. However, these goals can only be achieved if TOD is focused on through planning and allowed by zoning. Planning for TOD can help establish a vision and clarify needs and opportunities for the station area, increasing the likelihood of successful, well-designed developments. Zoning can ensure that TOD is permitted and encouraged. Zoning or related development codes should regulate building characteristics, such as height, density, and parking requirements, to ensure dense, walkable, and mixed-use TOD.[18]

Two Measures of Planning & Zoning in the TOD Report

1. Station area planning documents published online
2. Zoning ordinances obtained from city websites or city staff contacts

[18] https://legalclarity.org/what-is-the-purpose-of-zoning-laws/

PLANNING & ZONING

Station Area Planning

Local jurisdictions can create station area plans to advance and coordinate development around rail transit stations. Station area planning can be a valuable tool to:

- Promote denser infill redevelopment
- Initiate re-zoning
- Identify public/private partnership and incentive opportunities
- Engage community stakeholders
- Prepare public project ideas for funding, design, and implementation

Across the 14 cities with rail transit stations, there are approximately 42 adopted plans related to development around 75 station areas. These plans vary widely in content, with some focusing less on TOD and more on other community land use or development concerns. When they do address TOD, some are more in-depth with actionable implementation plans while others are more visionary or advisory. The list of planning documents inventoried by NCTCOG can be found in **Appendix 13**.

Many existing rail station area plans are also aging. About half are over 10 years old. **Table 12** indicates the spread of plans by age. **Figure 19** shows the geographic distribution of station area planning efforts across the region by age. 84 percent of stations in North Texas have a station area plan. However, one-third of these stations are covered by a plan adopted or updated before 2015.

Table 12: Year of Plan Adoptions

Year of Adoption	Number of Plans
Within the Last 5 Years (2020 to Present)	13
Within the Last 10 Years (2015 to Present)	21
Before 2015	20

PLANNING & ZONING

Station Area Planning Evaluation

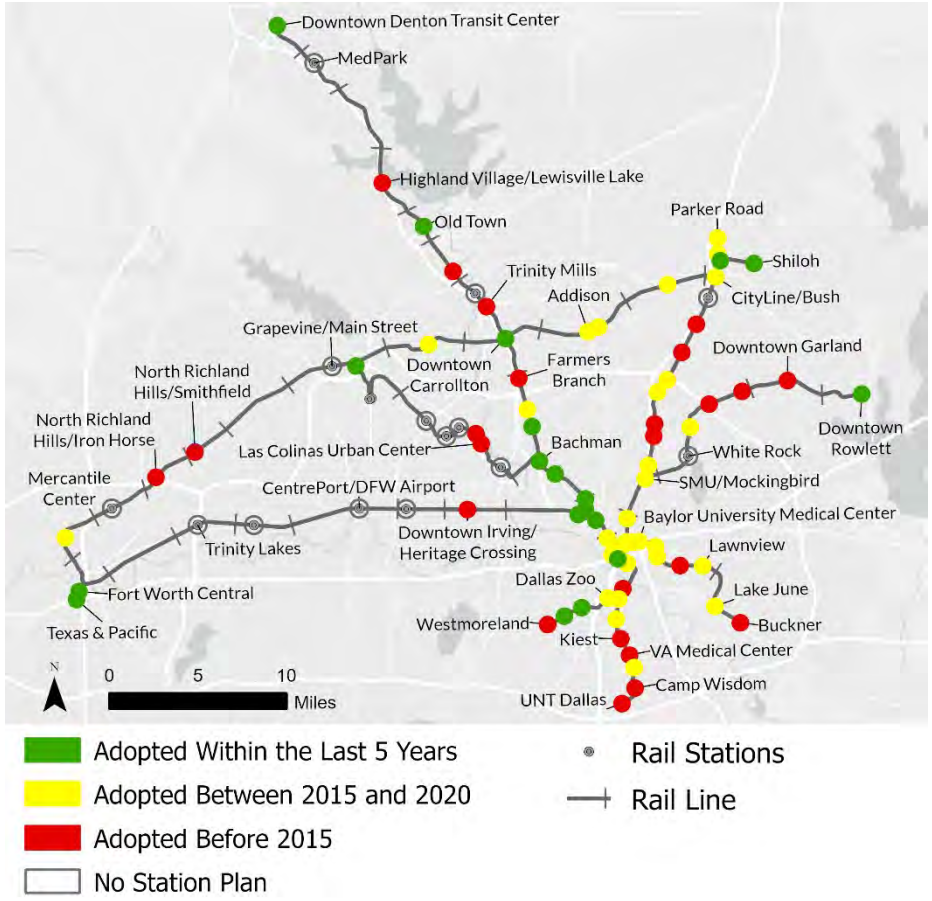
As previously noted, station area planning documents in North Texas vary widely in both content and scope. Because of this variability, NCTCOG created a method for evaluating the region's station area planning documents. The evaluation details and scores for the existing planning documents can be found in **Appendix 13.**

The evaluation method examines key elements of station area plans to score the plan's ability to advance regional TOD goals and promote development within the station area. Scores are generally based on the following features:

- Age of the plan
- Use of public engagement during planning process
- Vision incorporating TOD-supportive elements
- Station area geographic focus visualized through mapping
- Use of actionable implementation recommendations that align with TOD principles
- Use of catalytic site concepts

Most station area plans in North Texas scored well. **Figure 20** shows the distribution of evaluation scores (0 to 19) for the 42 existing station area planning documents across the region.

Figure 19: Station Area Planning

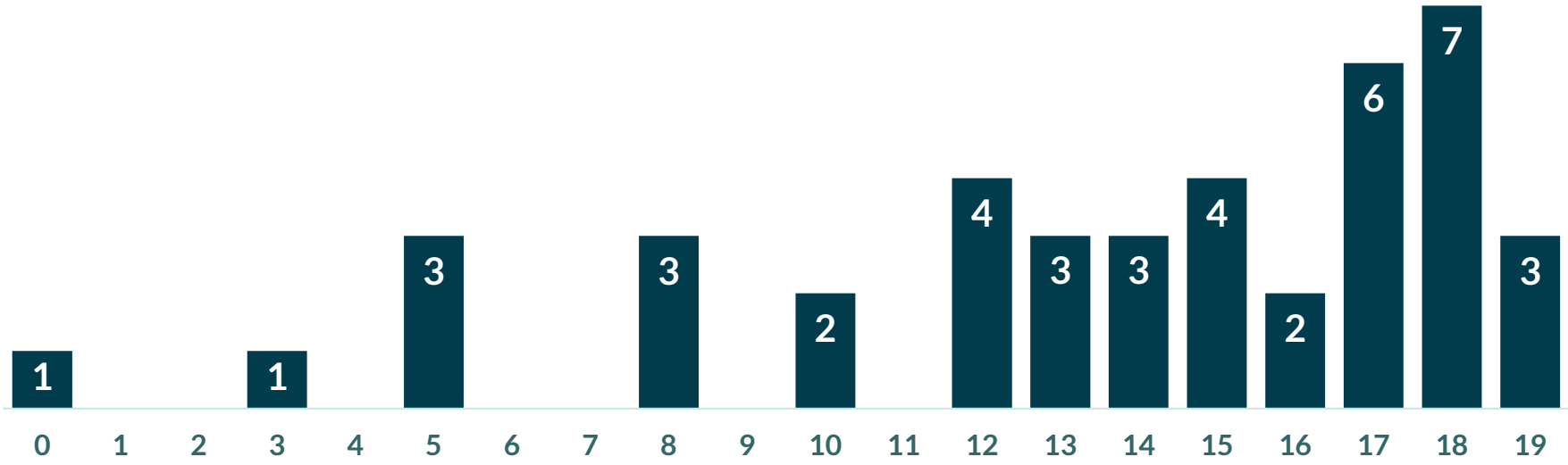


PLANNING & ZONING

Most of the plans include station areas maps that identify future land uses, bike and pedestrian connections, and locations for future development. However, less than half identify where development/redevelopment is feasible.

Additionally, most plans include recommendation strategies and implementation plans structured around TOD planning principles. However, recommendation strategies targeting housing availability and affordability are less likely to be included. Only about 61 percent of station area plans include catalytic site concepts to visualize TOD-supportive form/design standards. **Table 13** and **Table 14** list the stations without existing station area plans as well as stations with aging plans respectively.

Figure 20: Distribution of Station Area Plan Evaluation Scores



PLANNING & ZONING

Table 13: Stations without Plans

Station Name	City
North Carrollton/Frankford	Carrollton
White Rock	Dallas
MedPark	Denton
Bell	Fort Worth
CentrePort/DFW Airport	Fort Worth
Mercantile Center	Fort Worth
Trinity Lakes	Fort Worth
Grapevine/Main Street	Grapevine
Belt Line	Irving
Hidden Ridge	Irving
North Lake College	Irving
University of Dallas	Irving
West Irving	Irving
Galatyn Park	Richardson

Table 14: Stations with Aging Plans

Station Name	City	Age of Plan
Trinity Mills	Carrollton	2013
Buckner	Dallas	2013
Camp Wisdom	Dallas	2011
Hatcher	Dallas	2013
Kiest	Dallas	2013
LBJ/Skillman	Dallas	2014
Park Lane	Dallas	2013
UNT Dallas	Dallas	2011
VA Medical Center	Dallas	2013
Walnut Hill	Dallas	2013
Westmoreland	Dallas	2013
Farmers Branch	Farmers Branch	2012
Downtown Garland	Garland	2005
Forest/Jupiter	Garland	2013
Downtown Irving/Heritage Crossing	Irving	2014
Irving Convention Center	Irving	2013
Las Colinas Urban Center	Irving	2013
North Richland Hills/Iron Horse	North Richland Hills	2009
North Richland Hills/Smithfield	North Richland Hills	2009
Arapaho Center	Richardson	2001
Spring Valley	Richardson	2003

PLANNING & ZONING

Zoning

Zoning plays an essential role in allowing TOD to occur by influencing intensity and scale within the region's rail transit station area. The NCTCOG Sustainable Development Guidebook identifies key zoning metrics associated with walkable, transit-supportive design:

- **Higher Density:** Permit high intensity residential or mixed-use (≥15 units per acre or floor area ratio (FAR) ≥1).
- **High Lot Coverage:** Allowable lot coverage of 59 percent or higher, promoting compact, space-efficient development.
- **Greater Building Height:** Minimum height standards to encourage transit-supportive density.
- **Minimal Setbacks:** Reduced setbacks to position buildings close to sidewalks, enhancing the pedestrian environment.

While these four characteristics capture core aspects of TOD zoning, they are not exhaustive. Other regulations—such as parking supply, design standards, and street orientation—can either reinforce or undermine TOD goals by prioritizing automobile use.

For the report, base zoning districts within a half-mile radius of each station were evaluated for their potential to support TOD. The evaluation criteria were guided by the previously mentioned zoning metrics.

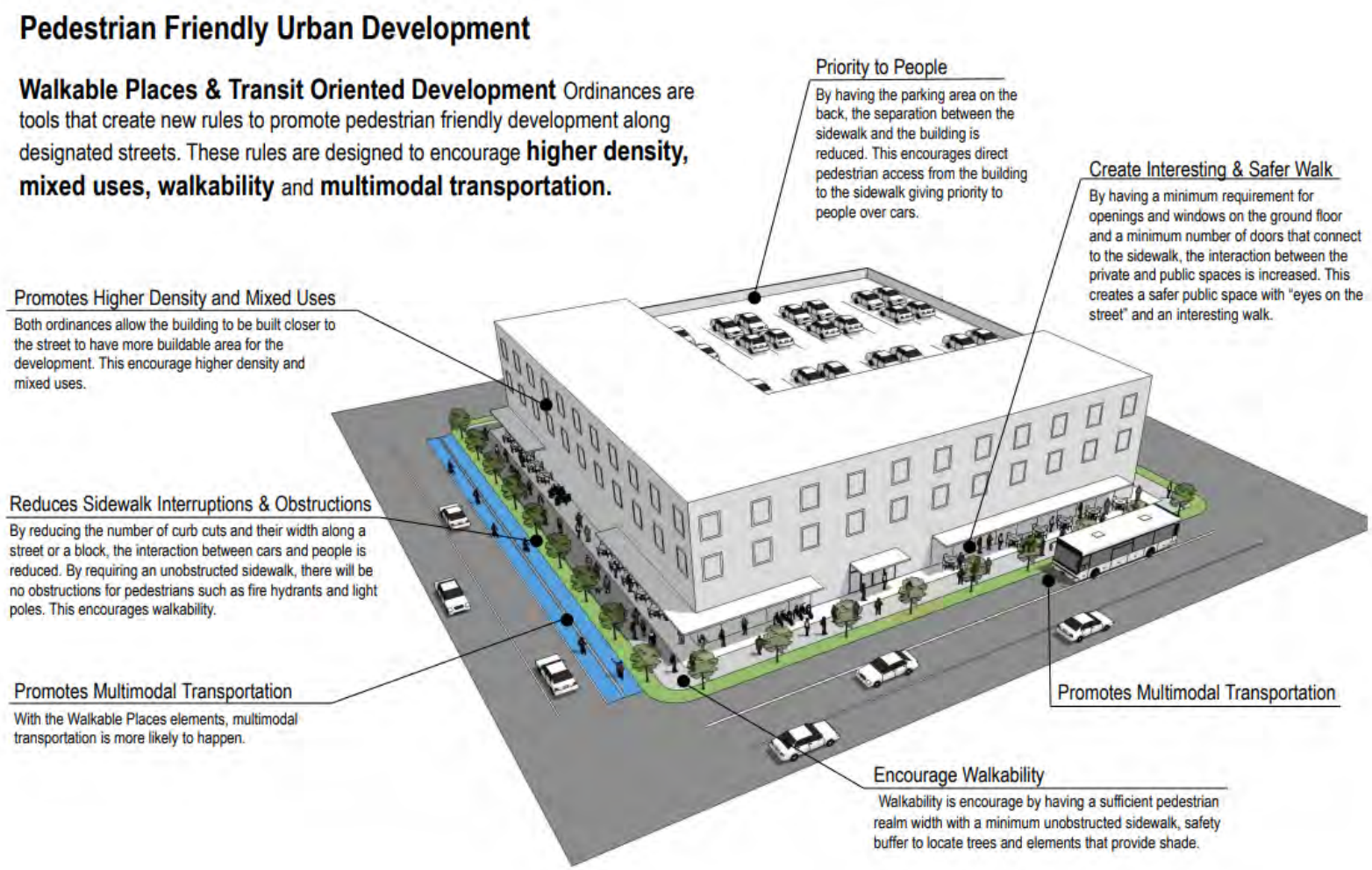
For classification purposes:

- Zoning districts meeting **three or more** of the four metrics were categorized as **TOD-supportive**.
- Districts meeting **two or fewer** metrics were categorized as **non–TOD-supportive**.

Identifying a zoning district as *likely TOD-supportive* does not guarantee that TOD will occur. The analysis considers only where zoning *permits*, but does not *require*, development consistent with TOD urban design principles, seen in **Figure 21.**[19] Planned Unit Developments (PUDs)—also referred to as Planned Developments (PDs)—were reviewed individually where documentation was available, as their supportiveness for TOD varies depending on specific requirements and design provisions.

[19] City of Houston. Pedestrian Friendly Urban Development. https://www.houstontx.gov/planning/Commissions/committee_walkable-places.html

Figure 21: City of Houston, Pedestrian Friendly Urban Development



PLANNING & ZONING

Zoning Analysis Evaluation

Zoning that enables TOD is essential, and the specific requirements and design standards within these districts play a critical role in creating walkable, connected environments. This evaluation of the rail transit station areas in North Central Texas focuses on documenting the extent to which that land is entitled for TOD and characteristics of those entitlements.

To present a regional-level summary and comparison, the zoning codes of the cities with rail stations are categorized into a standard code group as seen in **Table 15**. This only includes current zoning within a half-mile radius of each station area.

Table 15: City Code v. Standard Code

City Code	Standard Code
Agricultural	Agricultural
Commercial	Commercial
Heavy Commercial	
Corridor Commercial	
Multiple Commercial	
Light Commercial	
Business Park	
Freeway District	
Light Industrial	Industrial
Research Technology	
Extra-Territorial Jurisdiction	Institution
Public Facilities	
Community Service	
University Campus District	
School	
Church	
Institution	
Conservation District	
Public Use	

City Code	Standard Code
Mixed-Use	Mixed-Use
DFW Mixed-Use	
Duplexes	Multifamily
Town Homes	
Attached Homes	
Multifamily	
Retail/Office	Office
Office	
Open Space / Parks / Flood Plain	Open Space
PD	Special Zoning Approvals
Special Use	
Site Plan	
Local Retail	Retail
Regional Retail	
Community Retail	
Single Family	Single Family
Residential Districts	
Transit Centers	Urban Core /TOD
Central Business Districts / Downtowns	

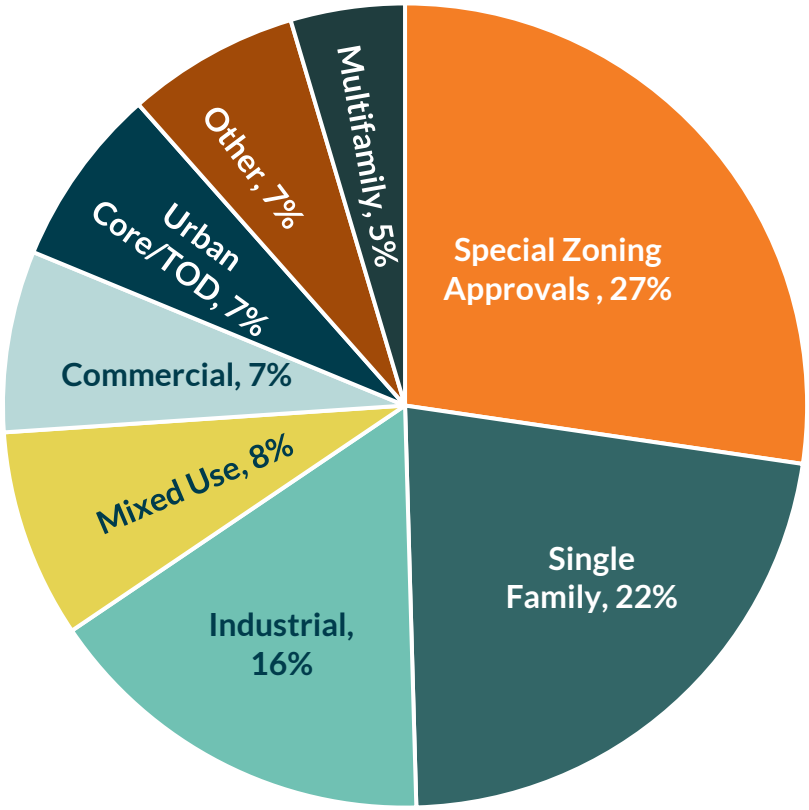
PLANNING & ZONING

Only about one-third of the current zoning of North Texas TOD areas are likely TOD-supportive. TOD-supportive zoning in the TOD areas typically includes:

- Mixed-Use
- Multifamily
- Urban Core/TOD
- Certain Retail/Office
- Some Special Zoning Approval areas

Figure 22 shows the proportion of zoning types across TOD areas. Most TOD areas are zoned for Special Zoning Approvals. This distribution highlights the dominance of PDs as an alternative to traditional by-right zoning within the Region, offering greater flexibility. PDs are frequently involved in the approval of mixed-use projects and are more adaptable to unique design criteria.[20]

Figure 22: Zoning Types Across TOD area

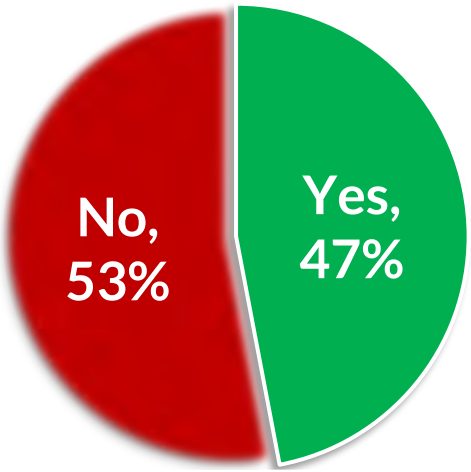


[20] Zoning for Mixed-Use Development. Daniel R. Mandelker. Washington University in St. Louis School of Law.2023

PLANNING & ZONING

While PDs can offer greater flexibility and are more frequently involved in mixed-use projects, most special approval zoning is NOT TOD-supportive, as seen in **Figure 23**. This highlights the inherent uncertainty of PD zoning in supporting future TOD outcomes, as redevelopment could result in either TOD-supportive PDs or continued auto-oriented development. In this context, adopted area land use plans should play a critical role in shaping future zoning outcomes by in forming planned development entitlements. Full tables on PD zoning classification can be found in **Appendix 9**.

Figure 23: North Texas TOD area: PD TOD-Supportiveness



PLANNING & ZONING

North Texas TOD Area Zoning Opportunities

To achieve the TOD goals of increasing economic development, non-car-dependent trips, and rail transit ridership across the region, the development of TOD must be enabled in the North Texas TOD area through city zoning regulations. **Table 16** indicates stations with less than five percent of their station area as TOD-supportive. These stations account for roughly one-fourth of the region's stations.

Table 16: Stations with Low TOD-Supportiveness

Station Name	City	TOD-Supportiveness
Hampton	Dallas	0%
Illinois	Dallas	0%
Burbank	Dallas	0%
Ledbetter	Dallas	0%
Belt Line	Irving	0%
Lawnview	Dallas	0%
Mercantile Center	Fort Worth	0%
Shiloh	Plano	0%
Walnut Hill/Denton	Dallas	0%
West Irving	Irving	0%
Bell	Fort Worth	1%
Tyler/Vernon	Dallas	1%
Parker Road	Plano	1%
Kiest	Dallas	1%
White Rock	Dallas	2%
Highland Village/Lewisville Lake	Lewisville	2%
Morrell	Dallas	3%
VA Medical Center	Dallas	3%
Westmoreland	Dallas	3%
Lake June	Dallas	3%
Bachman	Dallas	4%

ACTIVE TRANSPORTATION INFRASTRUCTURE

Active Transportation Infrastructure

Walking and biking, especially on safe and comfortable active transportation infrastructure connected to the transit station, is fundamental to the success of TOD.[21] Well-connected pedestrian and bicycle facilities provide key first/last mile connections from transit to destinations. These key connections may help increase non-car-dependent travel within the region. The status of active transportation infrastructure in North Texas likely plays a large role in TOD outcomes. Because of its importance, we must ensure the active transportation network is well-connected and accessible for all.

Two Measures of Active Transportation Infrastructure in the TOD Report

1. Sidewalk network within the half-mile radius of the region's rail stations and associated walkable area.
2. Bicycle facilities connecting to stations.

[21] https://tod.itdp.org/tod-standard/tod-standard-framework.html

ACTIVE TRANSPORTATION INFRASTRUCTURE

Sidewalks

This report mapped sidewalks within the half-mile radius of North Texas station areas to analyze connectivity between each property and the rail stations. Sidewalk data used in this report is derived from various sources built upon over time including Geographic Information System (GIS) layers shared by cities, purchased from aerial imagery analysis, and edited by NCTCOG staff. The methods and analysis here follow recent NCTCOG studies such as the Regional Routes to Rail Station Study in 2019, the 2021 DCTA A-Trail Routes to Rail Station Study, and the most recent 2024 Silverline Routes to Rail Stations Study.[22] Manual edits were completed to ensure the most up to date sidewalks were used to establish the half-mile station area.

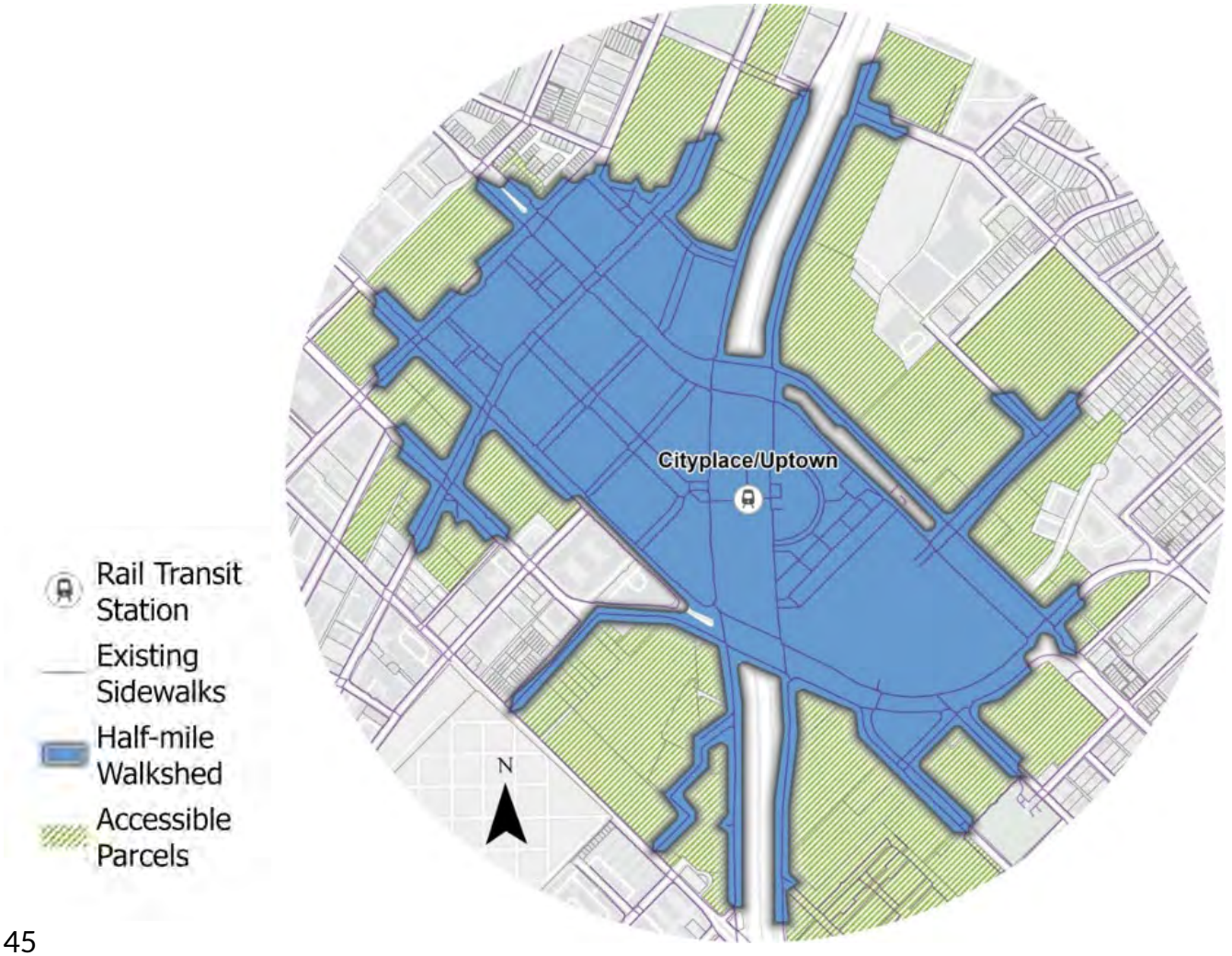
Using GIS, NCTCOG estimated the half mile "walkshed" which is the area a person can reach on a connected sidewalk. This means no walking through the grass or having to cross a roadway without a crosswalk. It also conforms to the street grid. **Appendix 10** provides an overview of the sidewalk editing and walkshed calculations.

Additionally, NCTCOG used its edited county appraisal district parcel layer to map housing and commercial space for each property in the half-mile radius of each station. The half-mile walkshed was overlayed on the parcel map to show how many properties could be safely walked to on an existing connected sidewalk. See **Figure 24** for an example comparison.

[22] https://www.nctcog.org/trans/plan/lumo/bikeped/active-transportation-routes-to-rail

ACTIVE TRANSPORTATION INFRASTRUCTURE

Figure 24: Example Comparison of Sidewalk Walkshed and Parcels at Cityplace/Uptown



ACTIVE TRANSPORTATION INFRASTRUCTURE

Sidewalk Walkshed Evaluation

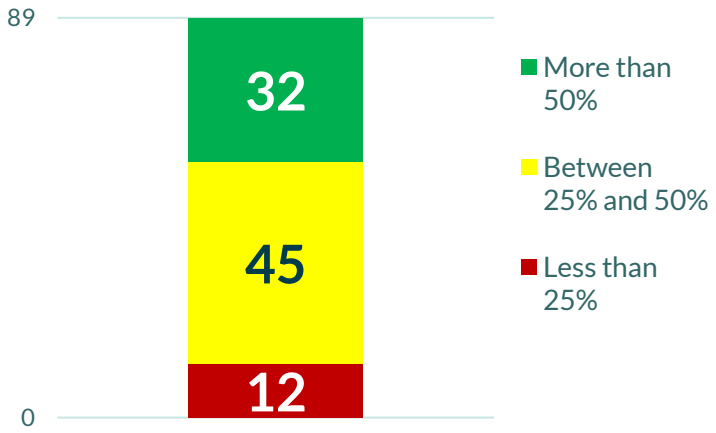
Most of North Texas TOD areas are not accessible by walking. As **Table 17** indicates, less than half of the North Texas TOD developable area is connected to the existing sidewalk network. Yet, more than half of the estimated housing units can be reached by current sidewalk walkshed. This is likely occurring because cities typically require sidewalks along public roadways with new development and recent apartment development has been trending towards higher density near transit.

Table 17: TOD Sidewalk Walkshed Statistics

Accessible by Sidewalk Walkshed	Percentage of North Texas TOD Areas
Number of Parcels:	29%
Parcel Acreage:	45%
Housing Units:	59%

Figure 25 shows the distribution of stations by the area accessible by their respective sidewalk walkshed. Between 25 percent and 50 percent of most station areas are accessible by walking. While few stations have less than 25 percent of their station area accessible by walking, the lowest amount of station area accessible by the walkshed is 12 percent while the maximum amount of station area accessible by the walkshed is only 76 percent.

Figure 25: Stations by Area Accessible by Sidewalk Walkshed



ACTIVE TRANSPORTATION INFRASTRUCTURE

Bicycle Facilities

This report uses the NCTCOG Trails and Bikeways database[23] composed of the Regional Veloweb, community paths and on-street bikeways to examine bicycle connectivity and access within the region's rail transit station areas. **Table 18** below outlines the scoring criteria used when evaluating station area bicycle facilities.

Bicycle facilities within the half-mile radius of North Texas station areas were scored through visual observations. For Bikeway Scoring eligibility, the bicycle facilities' status must be reported as "existing" or "funded" in the NCTCOG bikeways geodatabase before December 8, 2025. Additionally, facility types of "paved shoulders" or "shared lane markings" were excluded from the evaluation due to perceived lack of desire to use these types of facilities. The "planned" bicycle facilities were also evaluated for a Full Planned Build-Out Score, indicating where bikeways have been planned, but construction has not occurred.

Table 18: Station Area Bikeway Scoring Criteria

Score of: "0"	No eligible bikeways reach the station
Score of: "1"	At least one bikeway reaches the station AND continues beyond the half-mile radius of the station
Score of: "2"	At least one bikeway reaches the station AND continues beyond the half-mile radius of the station area in at least two different cardinal directions (north, south, east, west)
Score of: "3"	At least one bikeway reaches the station AND continues beyond the half-mile radius of the station area in at least three different cardinal directions
Score of: "4"	At least one bikeway reaches the station AND continues beyond the half-mile radius of the station area in at least 4 different cardinal directions

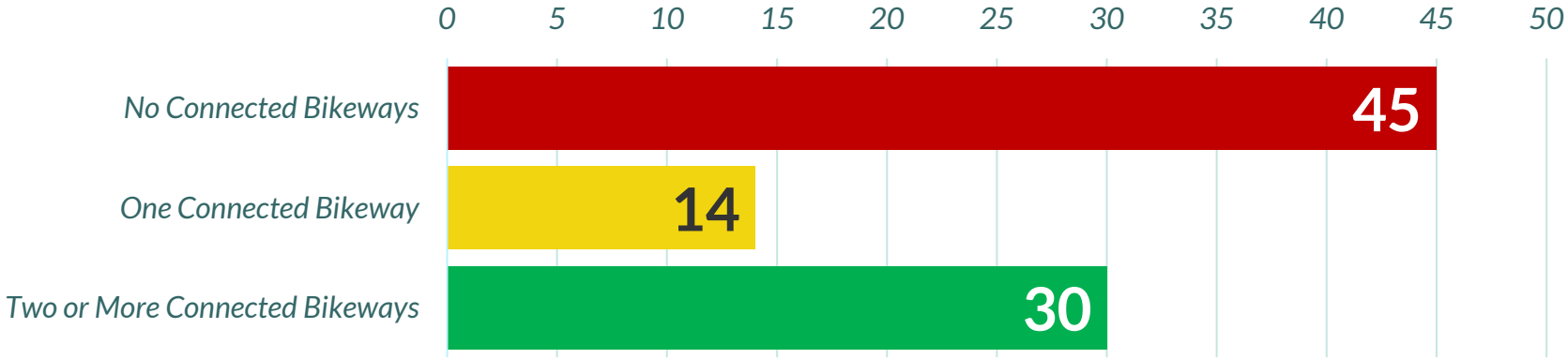
[23] https://nctcog.org/trans/plan/lumo/bikeped/veloweb

ACTIVE TRANSPORTATION INFRASTRUCTURE

Existing and Funded Bicycle Facilities Evaluation

Most stations in North Texas lack bicycle facilities that reach the station. However, if a station has a bikeway connection, it is likely to have more than one. A significant portion of stations have bicycle facilities that run through the station area half mile, connecting to the station before continuing onwards as demonstrated in **Figure 26**.

Figure 26: Number of Stations with Connected Bikeway Facilities



ACTIVE TRANSPORTATION INFRASTRUCTURE

Station Area Bikeway Opportunities

Nearly one-third of North Texas station areas would likely benefit from additional planning for bicycle facilities. **Table 19** lists stations with at least one connected bikeway, but little to no planned bikeway facilities.

Even though many stations lack adequate bicycle facilities, cities have planned improvements within their station areas. Several stations would have significant improvements to bicycle access and connectivity with full build-out of the planned station area bicycle network. **Table 20** lists stations with limited "existing" or "funded" bikeways, but have identified "planned" facilities that would improve station area bicycle access and connectivity.

Table 19: Planning Opportunity Stations

Akard	Dallas
Baylor University Medical Center	Dallas
Buckner	Dallas
Burbank	Dallas
Cedars	Dallas
Cityplace/Uptown	Dallas
Convention Center	Dallas
Dallas Zoo	Dallas
Deep Ellum	Dallas
EBJ Union	Dallas
Inwood/Love Field	Dallas
Kiest	Dallas
LBJ/Skillman	Dallas
Ledbetter	Dallas
Lovers Lane	Dallas
Medical/Market Center	Dallas
Park Lane	Dallas
Pearl/Arts District	Dallas
UNT Dallas	Dallas
VA Medical Center	Dallas
Victory	Dallas
Walnut Hill	Dallas
West End	Dallas
Fort Worth Central	Fort Worth
North Side	Fort Worth
Downtown Garland	Garland
Forest/Jupiter	Garland
North Lake College	Irving
Highland Village/Lewisville Lake	Lewisville

ACTIVE TRANSPORTATION INFRASTRUCTURE

Table 20: Stations that will likely have Improved Bicycle Access with Full Planned Build-Out

Station Name	City	Existing Bikeway Score	Planned Build-Out Score
North Carrollton/Frankford	Carrollton	0	3
8th & Corinth	Dallas	0	3
Bachman	Dallas	0	3
Cypress Waters	Dallas	0	3
LBJ/Central	Dallas	0	3
Mercantile Center	Fort Worth	0	3
DFW North	Grapevine	0	3
Belt Line	Irving	0	4
Downtown Irving/Heritage Crossing	Irving	0	4
Hidden Ridge	Irving	0	3
Irving Convention Center	Irving	0	4
Las Colinas Urban Center	Irving	0	4
University of Dallas	Irving	0	4
Downtown Rowlett	Rowlett	0	4
Trinity Mills	Carrollton	1	4
MedPark	Denton	1	4
Farmers Branch	Farmers Branch	1	3
West Irving	Irving	1	4
Parker Road	Plano	1	3
Downtown Plano	Plano	1	3

PARTNERSHIPS & INCENTIVES

Partnerships & Incentives

While TOD is desirable at every station, often they may lack a strong enough real estate market to support it. Development is privately controlled and the public sector cannot always dictate where, when, and how much development will occur, so partnership and incentives are often needed. Additionally, TOD in some station areas can be financially risky, placing a heavy burden on developers, requiring public investment to catalyze development. This report will attempt to measure how much North Texas cities with rail stations have used economic incentives to catalyze TOD.

Texas cities have broad options to incentivize economic development. This report will focus on those most connected to TOD and currently or previously used by North Texas cities.

Two Measures of Partnerships & Incentives in the TOD Report:

1. Tax Increment Financing (TIF) – TIF, or in Texas, tax increment reinvestment zones, which are one of the most visible and common tools.
2. Public-private partnerships (P3) and other Incentives – Tools where the public sector and private sector have an agreement or partnership on development such as: Tax Abatements, chapter 380 agreements, Public Facility Corporations, and Public Improvement Districts.

PARTNERSHIPS & INCENTIVES

Tax Increment Financing

Tax increment financing (TIF) is one of the most prominent methods utilized by local jurisdictions to pay for improvements that will incentivize private investment through the redirection of property taxes within designated districts.[24] Key benefits associated with TIFs include funding public infrastructure, promoting development, and lessening the burden on private developments providing public improvements.[25] Under modern Texas law, TIF districts do not have to be contiguous.

TIF is only one of several tools local governments can use to incentivize developers to build TOD through public-private partnerships. Other city-level economic incentives are not uniformly reported and more difficult to track across the region but likely have a larger impact than TIF alone. Later sections will review these other incentives.

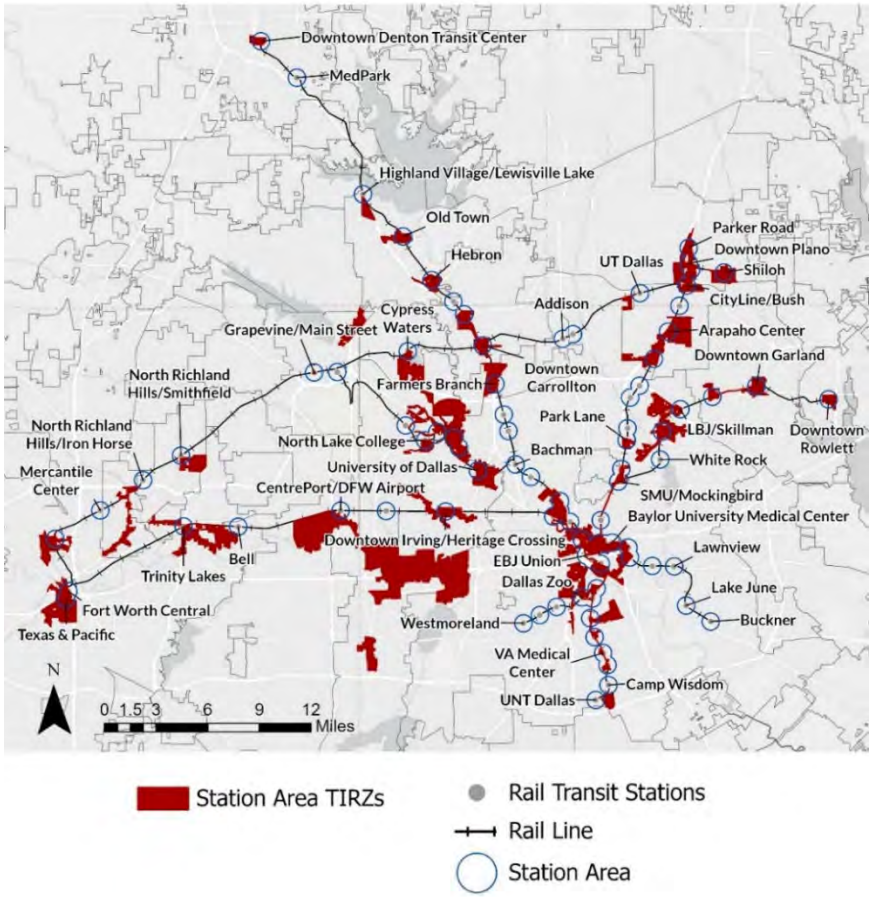
[24] https://comptroller.texas.gov/economy/development/prop-tax/ch311/. In Texas a TIF District is legally called a Tax Increment Reinvestment Zone (TIRZ). TIF district and TRIZ may be used interchangeably but mean the same thing.
[25] https://comptroller.texas.gov/economy/development/prop-tax/ch311/

PARTNERSHIPS & INCENTIVES

TIF Evaluation

In North Central Texas, there are 15 cities with a total of 40 TIFs that intersect with 58 station areas. This includes cities who are not part of a transit authority. Additionally, these TIFs may not be focused on TOD efforts. These 40 TIFs cover approximately 28 percent of the North Texas TOD area. A map of all the cities and their associated TIFs is in **Figure 27**.

Figure 27: Map of TIFs within Station Areas across North Texas



PARTNERSHIPS & INCENTIVES

Public-Private Partnerships and Other Incentives

As previously noted, cities use a variety of different incentives, in addition to TIF, to support development around rail transit stations. **Table 21** on the next page describes some of the common economic development incentives used by cities in North Texas but is not a comprehensive list of all possible incentives and tools.

While cities that enter into economic development agreements under Local Government Code Chapters 380-381 and tax abatement agreements under Tax Code Chapter 312 are required to report new and amended agreements to the Comptroller's office, this information is not always conveniently documented or actively advertised.[26] While the Comptroller's office reports economic incentive information on a searchable database, the information does not provide addresses for the entities receiving incentives. This makes it difficult to determine whether the development is within the station area and/or TOD.

The use of economic incentives is usually only broadcast with major, multi-million-dollar projects. This semi-transparency may give the impression that cities are not doing enough to support TOD.

This section of the Report is intended to highlight the economic development incentive use across North Texas TOD areas. For this report, data on economic incentives was obtained from cities with rail transit stations through an informal data request. Twelve of the 14 cities with rail transit stations supplied NCTCOG staff with requested information.

Most economic incentives are reported publicly, but the information is typically buried within council agendas or otherwise difficult to access and interpret. When this information was requested for this report, cities had to take time to compile the data since it was not readily available. Cities should take proactive steps to improve their record keeping and transparency with their use of economic incentives.

[26] https://comptroller.texas.gov/economy/development/search-tools/sb1340/

PARTNERSHIPS & INCENTIVES

Table 21: Types of North Texas TOD Economic Incentives

Economic Incentive	Definition
Tax Abatement	A tax abatement exempts all or part of the increase in the value of property and/or tangible personal property from taxation for a period not to exceed 10 years.[27]
Chapter 380 & 381 Economic Development Agreements	Municipalities and counties are authorized to offer loans and grants of public money to promote state or local economic development and to stimulate, encourage and develop business locations and commercial activity.[28]
Public Improvement Districts (PIDs)	A PID allows property owners in an area to establish a funding source to pay for new or improved services or infrastructure.[29]
Land Use Public-Private Partnerships (PPP or LU P3)	**Using a P3 to Facilitate Development (Most Common with TOD):** Development PPPs have the power to develop or redevelop an area or site, often blighted or underused, within a community. The partnership may be proactively initiated by a municipality to achieve key public objectives, such as downtown revitalization, affordable housing, industrial and commercial development, transit-oriented development, or neighborhood services.[30] In North Texas this is typically initiated with public land.
Public Facility Corporation (PFC)	A Public Facility Corporation, or PFC, allows a housing development to access a property tax exemption in exchange for affordability, by entering into a long-term partnership with a PFC managed by a City or other government entity.[31] (NCTCOG considers this an incentive since it relies on a local tax exemption.)
Housing Finance Corporations (HFC)	A Housing Finance Corporation, or HFC, allows local governments to create and use public nonprofit corporations as a means to finance the cost of residential ownership and development that will provide decent, safe, and sanitary housing at affordable prices for residents.[32] (NCTCOG considers this an incentive since it involves local tax exemption.)

[27] https://comptroller.texas.gov/economy/development/prop-tax/ch312/
[28] https://comptroller.texas.gov/economy/development/grants/ch380-381/
[29] https://statutes.capitol.texas.gov/?tab=1&code=LG&chapter=LG.372&artSec=
[30] https://uli.org/wp-content/uploads/ULI-Documents/Successful-Public-Private-Partnerships.pdf
[31] https://statutes.capitol.texas.gov/?tab=1&code=LG&chapter=LG.303&artSec=
[32] https://statutes.capitol.texas.gov/?tab=1&code=LG&chapter=LG.394&artSec=

PARTNERSHIPS & INCENTIVES

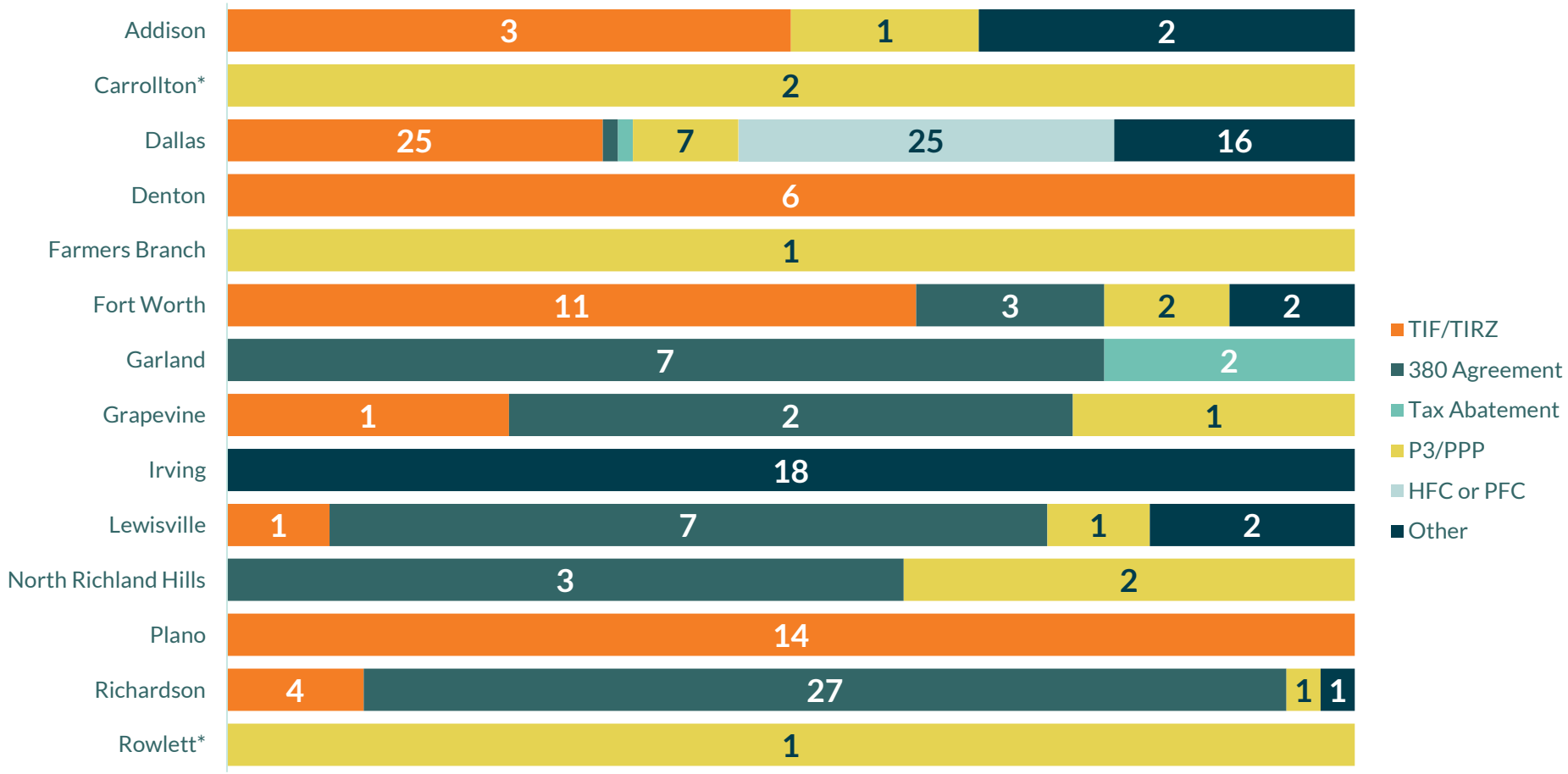
P3 and Other Economic Incentives Evaluation

From the data provided, cities in North Texas TOD areas have invested over **$2 billion** in economic incentives across 189 development projects. The year of project completion ranges from as early as 2000 to 10+ years into the future. Most projects in this sample have received public support through Tax Increment Financing; however, over a quarter of the projects use Chapter 380 Agreements. This is only a limited sample based on data provided by cities who responded to NCTCOG's request. More study is needed.

Figure 28 shows the variability in the use of economic incentive strategies across the cities in North Texas TOD areas. As demonstrated, some cities appear to rely mainly on one method while others have employed a combination. The City of Dallas is the only city to report using HFC or PFC as a TOD economic development strategy. Different city staff interpreted NCTCOG's request for "economic incentives" in different ways. Some may not have considered housing programs to fall in this group while others may not have considered housing to be an economic incentive.

PARTNERSHIPS & INCENTIVES

Figure 28: Variability of Economic Incentives Reported for Station Areas



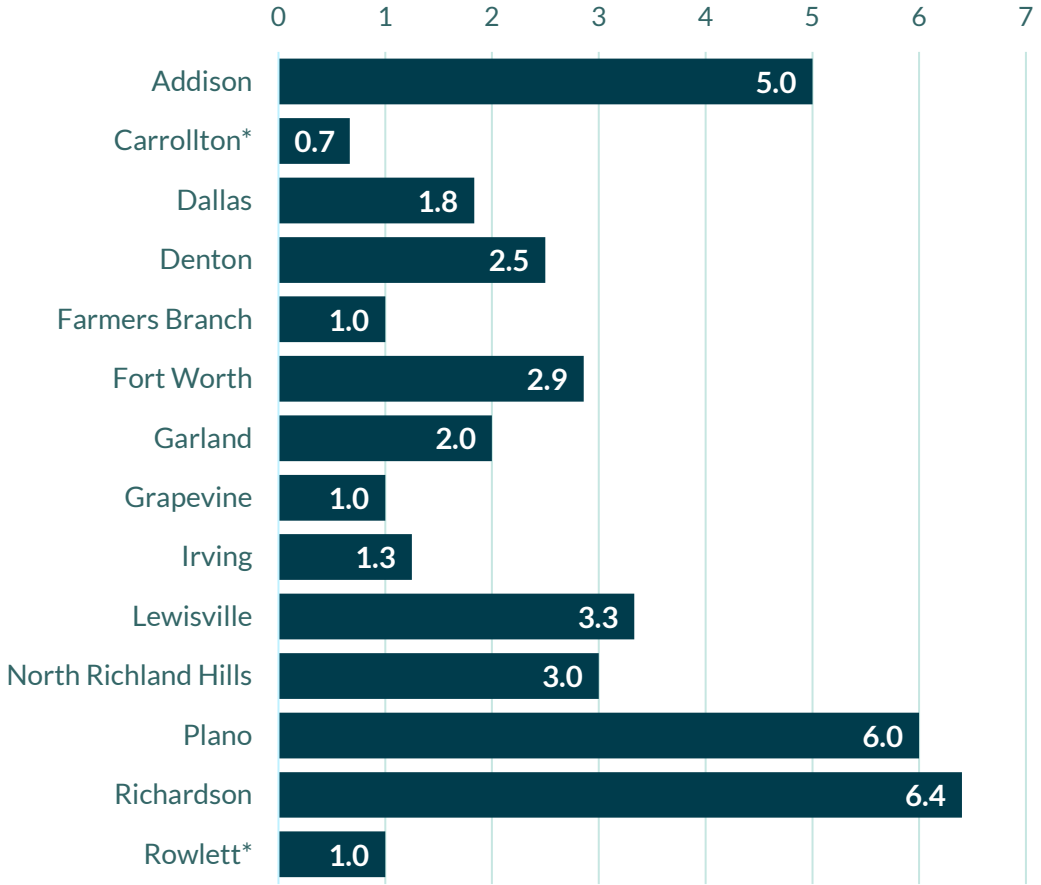
** Carrollton and Rowlett did not provide economic incentive data, but NCTCOG staff are aware of at least one project at their station areas.*

PARTNERSHIPS & INCENTIVES

Cities of the North Texas TOD area have used economic incentives to assist in financing projects at over half the station. **Figure 29** shows the average number of incentives per each city's respective stations. While many of these projects have been completed, approximately 30 percent of those provided for this report are under construction or are being planned.

This data should not be considered comprehensive as cities have broad economic development capacities and different practices per city that make regional analysis complex. However, this sample does show cities are trying to incentivize TOD but could increase their efforts. It should also be acknowledged that different station areas exist in different market contexts. Some station areas are in very affluent areas and easily attract private capital for partnerships. Other stations with less favorable markets require extraordinary efforts by the city to attract a limited number of investors and developers willing to take the risk. This may be the subject of later analysis.

Figure 29: Average Number of Incentives Per Station



PROGRESS SUMMARY

Progress Summary

Since the start of the regional rail system in 1996, North Texas has made progress implementing TOD to help with regional goals. This report covered the key progress in the areas of economic development, walkability, and ridership.

The station areas have seen economic development with over 350 TODs built at over half of the rail stations. Many of these did not have a transit-oriented context prior to the construction of modern passenger rail system. The station areas are denser than the rest of North Texas, and they provide access to 13 percent of the region's jobs. North Texas station areas have a higher rate of walking to work than the region as a whole and 60 percent of rail transit riders are walking from the train platform to their destination. Finally, ridership has increased in the past few years. While there are many factors influencing ridership, increased TOD is likely helpful to this goal.

NCTCOG will continue to track these performance measures as the agency continues to support TOD. While North Texas rail cities have made progress advancing TOD, there is still significant work to do. The public sector including municipalities, transit agencies, counties, the Texas Department of Transportation, and NCTCOG can work together to further implement TOD and supportive context.

TOD RECOMMENDATIONS

Recommendation for Increasing TOD

Planning and Zoning Recommendations:

- Rezone more properties to allow for greater density around the rail transit stations including urban design standards to ensure the form, placement, and orientation of development is transit supportive.
- Prioritize rezoning of commercial properties closest to the stations and include strong TOD design requirements.
- Catalyze city-initiated rezoning through updated station area plans.
- Ensure agreements for PDs within station areas promote form and design standards encouraging transit.
- In areas with higher single-family zoning, evaluate the feasibility to upzone for "missing middle" housing such as duplexes and town homes.
- Using performance and action data measures, NCTCOG staff identified 10 station areas in **Table 22** for further planning.

Table 22: Top Ranking Stations for Station Area Planning Needs

	Station	City	Existing Plan	Future Planning Study?
1	***Mercantile Center***	Fort Worth	No	No
2	***Trinity Lakes***	**Fort Worth**	**No**	**Yes (FTA TRE TOD)**
3	***West Irving***	**Irving**	**No**	**Yes (FTA TRE TOD)**
4	***Camp Wisdom***	Dallas	Yes (2011)	No
5	***CentrePort/DFW Airport***	**Fort Worth**	**No**	**Yes (FTA TRE TOD)**
6	***MedPark***	Denton	No	No
7	***North Carrollton/Frankford***	Carrollton	No	No
8	***North Richland Hills/Iron Horse***	North Richland Hills	Yes (2009)	No
9	***North Richland Hills/Smithfield***	North Richland Hills	Yes (2009)	No
10	***University of Dallas***	Irving	No	No

Active Transportation Infrastructure Recommendations:

- Use sidewalk data from this report to identify and prioritize gaps in the sidewalk and crosswalk network to expand the area that can be safely and comfortably walked to from the station platform.
- Improve access and connectivity of bikeway network within the station areas.
    - Ensure bikeways directly connect to the station platform without barriers
    - Future planning and funding efforts should prioritize direct connection to the rail transit stations (ex. project proposed within one or two miles of rail transit station should have a direct connection to the station or build upon existing infrastructure that already connects)
- Use station area plans to identify, prioritize, and create preliminary scopes improving the sidewalk and bicycle networks at each station.

Partnerships and Incentives Recommendations:

- Cities and transit agencies should continue to partner on redeveloping publicly owned parking lots near rail stations into dense development.
- Cities should continue to use all economic incentive tools at all their station areas to encourage TOD.
- Use station area plans to identify, prioritize, and create preliminary concepts for redeveloping key public properties at rail stations into TOD.
- Cities should organize and coordinate regionally on better methods of sharing and documenting economic incentives and partnership data to demonstrate commitment to TOD.