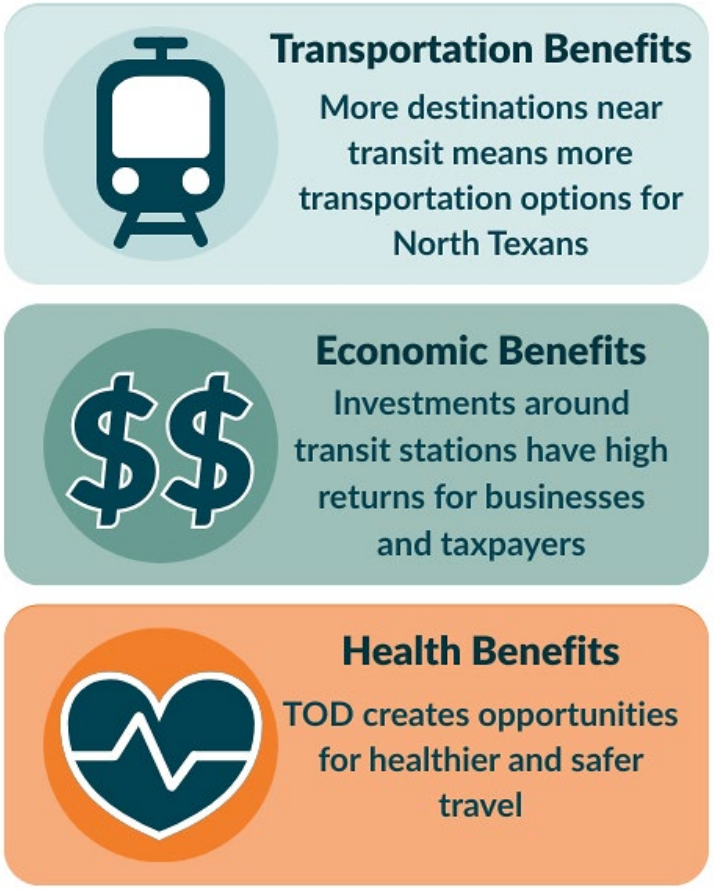
Introduction

What is TOD?

Transit-Oriented Development (TOD) is a key strategy supported by the North Central Texas Council of Governments (NCTCOG) to improve transportation and economically beneficial regional growth. NCTCOG defines TOD in its Mobility 2050 Plan[1] as a style of planning and development that encourages pedestrian activity by adding higher density and mixed land uses within a half-mile walking distance of a passenger rail station. TOD encourages commuters to bike or walk in combination with transit. It accomplishes this through a well-designed, accessible built environment and a connected bike facility and sidewalk network. While this report focuses on the regional passenger rail stations, future TOD efforts may include stations for bus rapid transit, street cars, and other transit hubs.

Figure 1: Benefits of TOD



[1] https://www.nctcog.org/trans/plan/mtp/mobility-2050

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, housing, and other essential services becomes more critical. TODs can provide more commuting capacity combined with employment and housing options to ease traffic, improve air quality, and help with other rapid growth challenges. Additionally, according to the Federal Transit Administration (FTA), successful TOD leverages public investment in transit to promote items in Figure 2.[2]

Figure 2: Potential Impacts of TOD

- Neighborhood revitalization
- More affordable housing
- Public- and private investment
- Economic returns to surrounding landowners and businesses
- Increased ridership for transit systems
- Congestion relief and improved air quality
- Improved safety for pedestrians and cyclists

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.

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

NCTCOG TOD Goals

NCTCOG's regional TOD goals and policies are informed by Mobility 2050: The Metropolitan Transportation Plan for North Central Texas as well as The North Central Texas Regional Transit 2.0: Planning for Year 2050 Study[3], specifically goals from Task 6 – Develop Strategies for In-Fill Development. **Figure 3** outlines the Mobility 2050 goals that are supported by Sustainable Development. The Mobility 2050 Goals and Transit 2.0 Task 6 strategies have been condensed into three measurable goals for this report.

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.

Figure 3: Mobility 2050 Supported Goals

MOBILITY
Improve the availability of transportation options for people and goods.
Support Travel efficiency measures and system enhancements targeted at congestion reduction and management.
Ensure all communities are provided access to the regional transportation system and planning process.
QUALITY OF LIFE
Preserve and enhance the natural environment, improve air quality, and promote active lifestyles.
Encourage livable communities which support sustainability and economic vitality.
SYSTEM SUSTAINABILITY
Ensure adequate maintenance and enhance the safety and reliability of the existing transportation system.
Pursue long-term sustainable revenue sources to address regional transportation system needs.
IMPLEMENTATION
Provide for timely project planning and implementation.
Develop cost-effective projects and programs aimed at reducing the costs associated with constructing, operating, and maintaining the regional transportation system.

[3] https://www.nctcog.org/trans/plan/lumo/transit-management-and-planning/general-public-information/transit-planning-activities/transit-planning-projects/regional-transit-2-0

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 approximate half-mile radius of the region's 89 rail transit stations.

As shown in **Figure 4**, 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 4: Overview of the Report



Performance 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



Image Source: DART

Economic Development

Creating economic development with sustainable value for North Texas is a primary goal of TOD. Economic development is 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

To view these measures across the region in greater detail, please visit the NCTCOG TOD Interactive Map.

NCTCOG Regional TOD Inventory

The Regional TOD Inventory is a database of built TOD projects across Dallas Area Rapid Transit (DART), Trinity Metro, and Denton County Transportation Authority (DCTA) rail transit stations identified by NCTCOG staff. This 2026 report builds on the 2024 Regional TOD Inventory and methods found on the NCTCOG website under TOD Insights.

The Regional TOD Inventory was updated for 2026 with new developments and created four categories of TOD. The main category is traditional new development of commercial real estate. The second is adaptive reuse, which are older buildings larger than 10,000 square feet outside of historic walkable places where most of the primary structure has been preserved. Together these two categories comprise the market driven total TOD count.

The third inventory category is public/institutional buildings with TOD design. Finally, the inventory also includes non-TOD affordable housing projects. These are not included in the progress total. The TOD inventory will continue to be updated in the future.

The inventory acknowledges not all TODs are of ideal design. TODs were evaluated using design criteria developed from a summary of national transit-oriented and pedestrian-oriented design guidelines. See TOD inventory details on the NCTCOG website under TOD Insights.

Figure 5: Number of TOD per Station Area

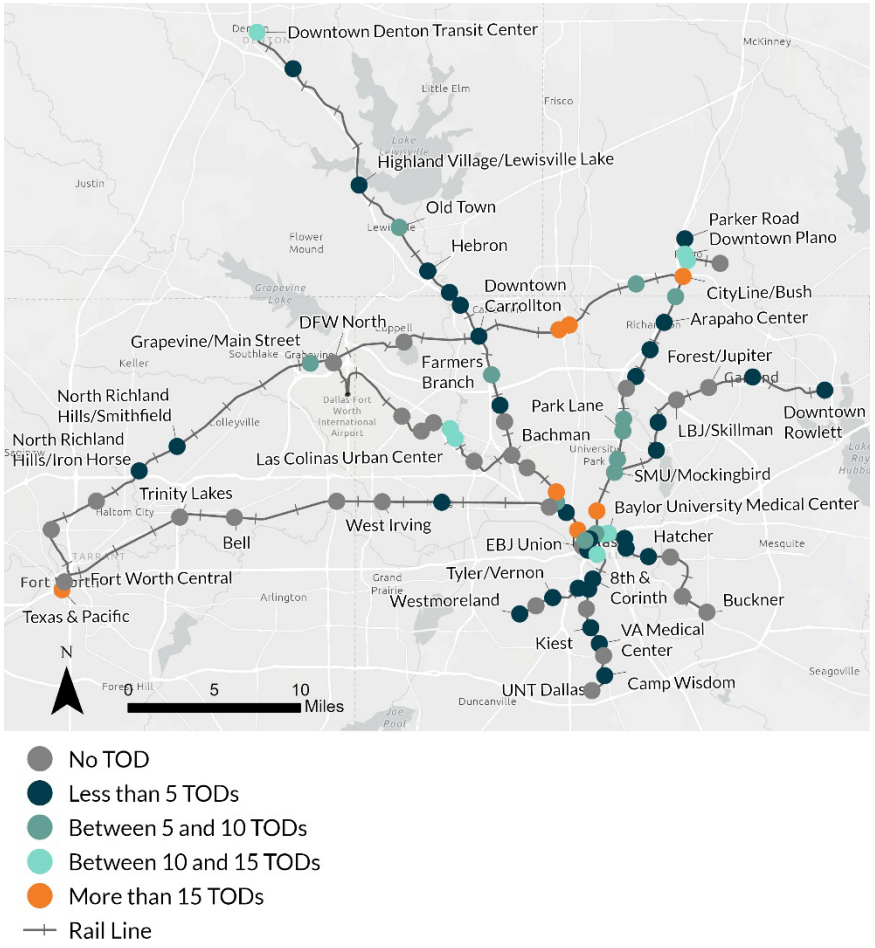


Figure Source: NCTCOG Region TOD Inventory

Findings

Within a half-mile radius of the region's 89 existing rail stations (excluding Dallas-Fort Worth International Airport terminal stations), over 351 existing and adaptive reuse projects qualified as TOD based on the location, building age, density, and form criteria. Following staff evaluation, more than 55 of the qualifying TODs met all standard national TOD design criteria. Shown in **Figure 5**, these TODs are unevenly distributed across the region's rail stations with more than 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 6**. According to NCTCOG's TOD Inventory, 75 sites were built between 2021 and 2026. 27 of these developments occurred in 2021.

In addition to over 351 market driven TOD shown in **Figure 6**, there are likely more than 20 public or institutional projects with TOD design and over 36 affordable non-TOD projects within the region's station areas.

Figure 6: Number of Completed TODs in North Texas per Year

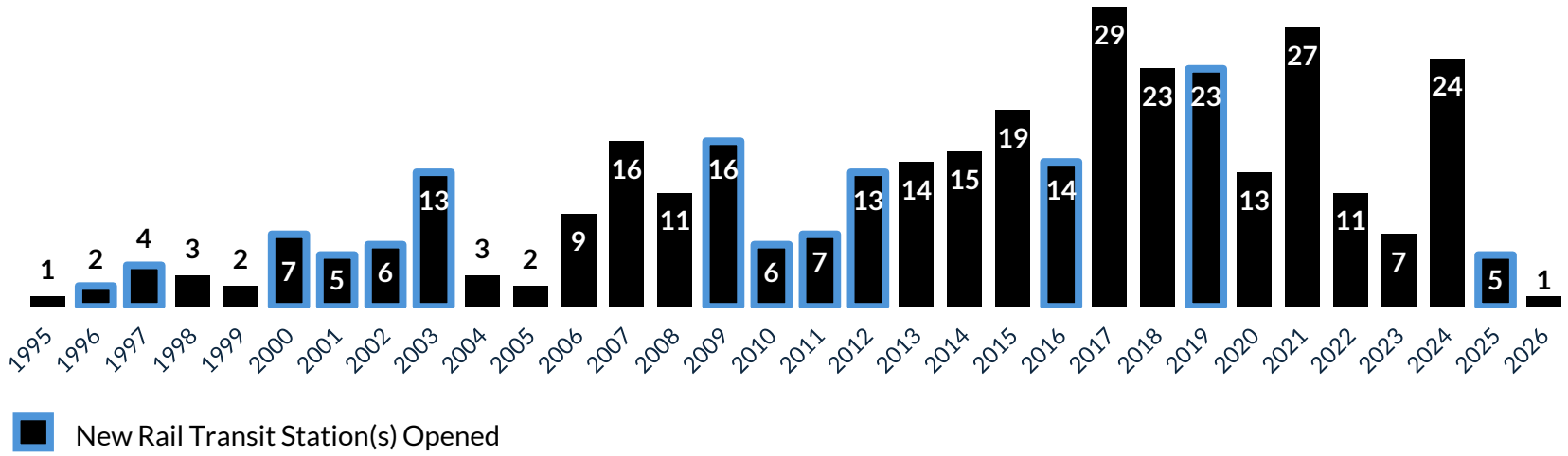


Figure Source: NCTCOG Region TOD Inventory

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 more value than low density.

The ideal density required to support transit remains unclear. Transit agencies across Texas reference varying density thresholds. DART's Transit Oriented Development Guidelines notes that 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] CapMetro's Equitable Transit-Oriented Development Policy Plan outlines different population thresholds likely to the support mobility investment and be competitive with FTA grants.[5]

One recent study "*Mandating Density Near Transit: Practices by States and Provinces in the United States and Canada to Direct Housing Growth to Transit Areas*" offers insights into possible target density levels used across governments.[6] A minimum density target across these governments are 2.5 floor area ratio (building space / land) or 15 units per acre. This report will look at building area and residential units.

Relying on American Community Survey (ACS) Block Group for total density can lead to an overestimation since some Census Block Groups extend beyond the station area half-mile. Additionally, ACS total population numbers are less reliable at small geographies. Yet, for a significant number of data variables, ACS Block Group data is the smallest geographic scale available for analysis and it is still recommended for describing measures of central tendency and trends for most demographics, just not total values.

A better population measure available to NCTCOG staff is 30x30-meter grid cell data from the NCTCOG Demographic Forecast for population estimates. Additionally, quality controlled appraised parcel-level data for housing and building estimates was used. 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.capmetro.org/docs/default-source/plans-and-development-docs/transit-oriented-development-docs/etod-policy-plan-2023.pdf?sfvrsn=bfa5483a_1
[6] https://www.urban.org/sites/default/files/2025-12/Mandating%20Density%20Near%20Transit.pdf

Findings

Table 1 contrasts density statistics between the North Texas TOD area and the Region. When compared with the minimum residential density of 30 units per acre for rail-based TOD indicated by DART, the North Texas TOD area has a low residential density. Shown in **Figure 7**, more than 60 percent of station areas in North Texas have an average residential density of less than 6 units per acre. Additionally, there are **only two stations** with a residential density over 30 units 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,[9] per acre.

Table 1: Density Statistics

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

Figure 7: Housing Densities Across the North Texas TOD Area

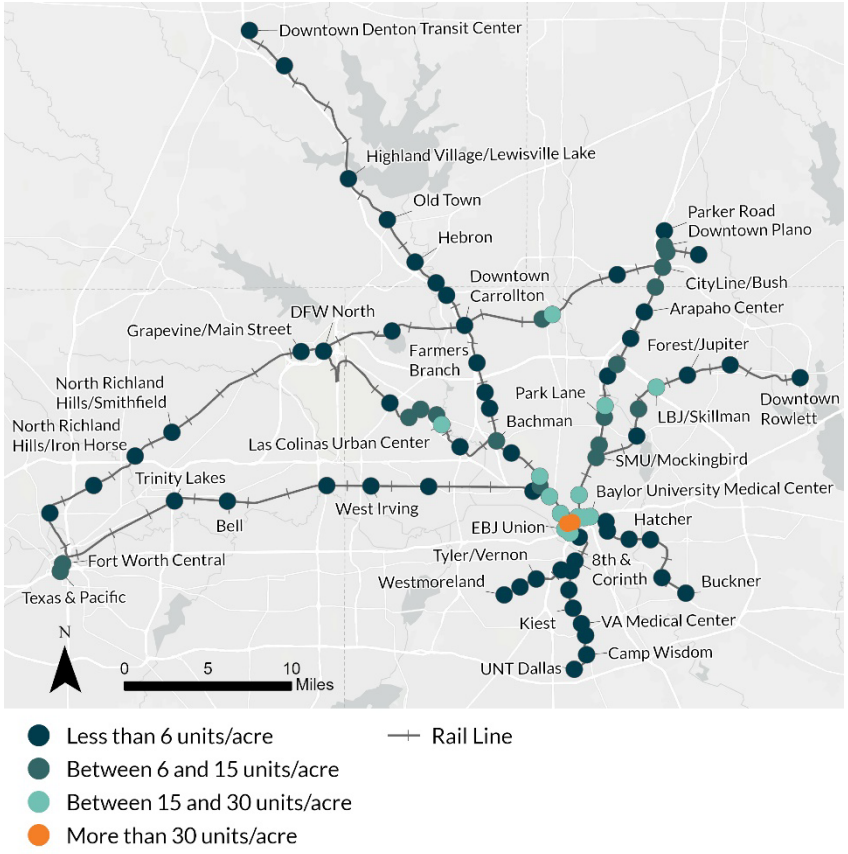


Figure and Table Source: 2025 NCTCOG Station Area Parcels. *See* ***Appendix 2*** *for additional data and analysis.*

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

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.[10] 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[11] prepared for Mobility 2050.[12] 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 closely fit the station area half-mile radius.

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

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 8** 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 8: Job Distribution

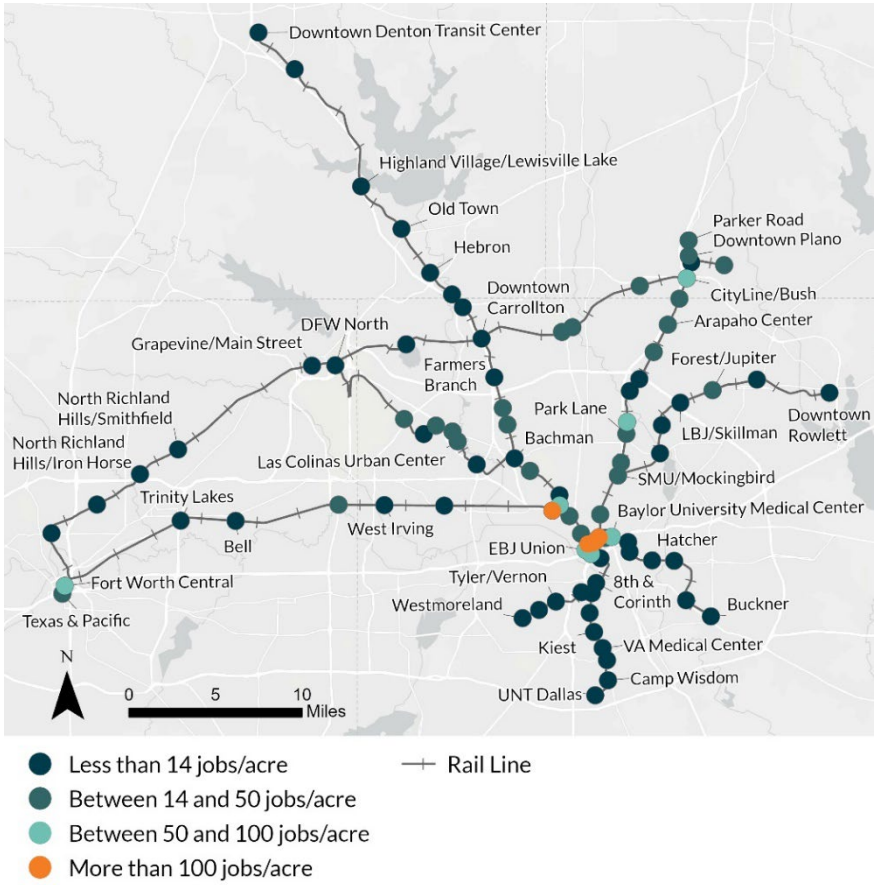


Figure and Table Source: 2025 NCTCOG Demographic Forecast. *See* ***Appendix 2*** *for additional data and analysis.*

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.[13] By encouraging individuals to use alternative modes of transportation for travel, TOD can promote more active lifestyles, improved air quality, and reduce traffic congestion.

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.

Although widely known and commonly used, Walk Score was not included as a data source for walking in the TOD report. Walk Score measures potential walkability of an address or area but does not measure or report actual walking trips that have occurred.

The two data sources used on observed walking behavior in this report indicate that most North Texans living near rail stations don't walk for work commutes often. However, North Texans riding rail transit walk to and from rail stations for most of their trips using rail.

For a more detailed review of commute mode choice within each station area, please visit the **NCTCOG TOD Interactive Map**. Under the **Performance** tab, select Walking Mode to explore station-specific travel behavior and commuting patterns across the region.

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

Commute Mode Split (ACS)

Station area commute mode choice taken from Census ACS data shows how many individuals in station areas choose walking and other modes for their typical work commutes. ACS commuting data is isolated to only work trips.

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.

This station area commute mode measure was collected from Census ACS 2020-2024: Means of Transportation to Work data table (the smallest geographic scale available for ACS commute mode choice information since the NCTCOG Demographic Forecast only provides data on population and job estimates). 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.

Findings

Although residents in North Texas TOD areas are more likely to walk or use public transportation for their commutes, only about five percent of these residents report walking, biking, or using public transit to get to work (see **Table 3**). Furthermore, **Figure 9** shows that the proportion of commuters reporting walking, biking, and using public transit is less than five percent at over half the stations in North Texas.

Table 3: Commute Mode Split Statistics

	North Texas TOD Areas	North Texas Region
Drove Alone	66.0%	69%
Carpooled	9.6%	10%
Public Transportation	2.0%	1%
Walked	3.0%	1%
Bicycled	0.2%	0%
Other Modes	1.6%	1%
Worked from Home	17.7%	18%

Figure 9: Walking, Biking, and Public Transit Commutes Across Station Areas in North Texas

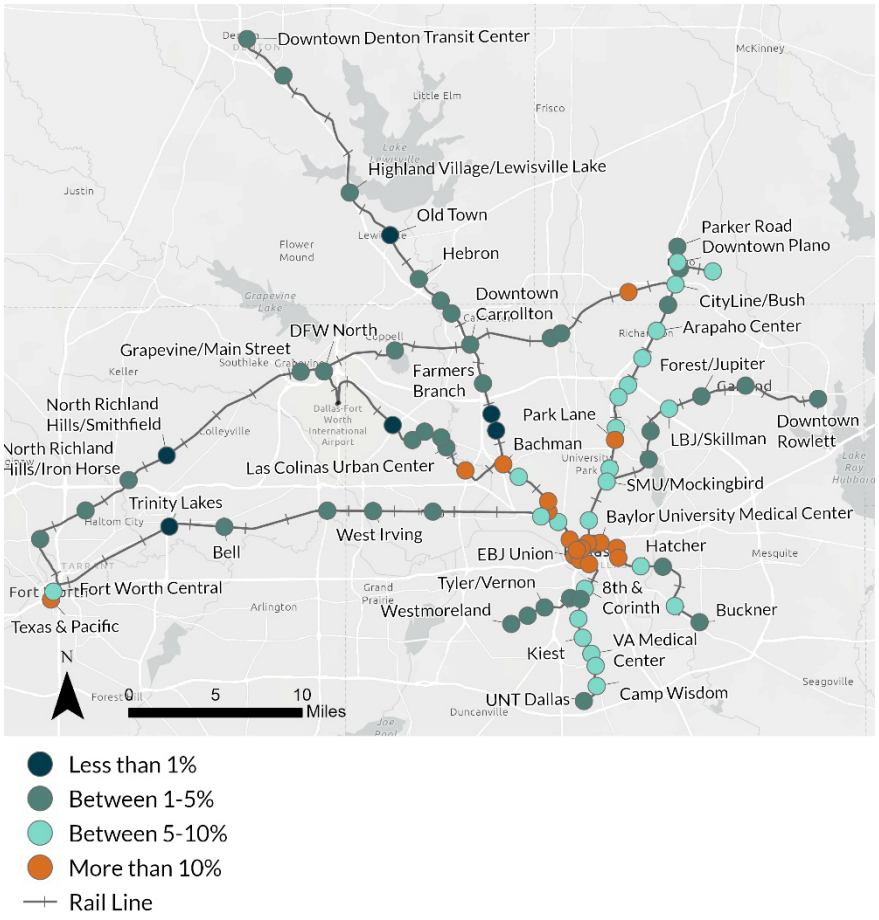


Figure and Table Source: *2020-2024 ACS Commute Split. See* ***Appendix 3*** *for additional data and analysis.*

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.

Data obtained from the 2022-2023 Transit On-Board Survey is isolated to transit trips where the passenger either boarded or alighted from a rail transit station. These rail transit trips are further classified by whether the trip was produced or attracted to associated rail transit stations. 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.

To get productions and attractions, any trip coming from "home" and going to "home" is classified as the "home-end" of the trip. The "home-end" is identified as the production end. The other end of the trip not associated with "home" is identified as the attraction end. For trips where "home" is not indicated, the trip starting location (origin) is the production end and the trip ending location (destination) is the attraction end.

Findings

Passengers using the region's rail transit system are most likely walking and biking to or from stations. Additionally, as shown in **Figure 10** and **Figure 11**, riders are more likely to walk or bike from a station to their destination than from their origin to a station.

Even though roughly 25 percent of transit riders indicate using an automobile for travel from their origin to a station, significantly less report automobile trips when traveling from stations to destinations.

Figure 10: First Mile Travel for Rail Transit Trip Productions

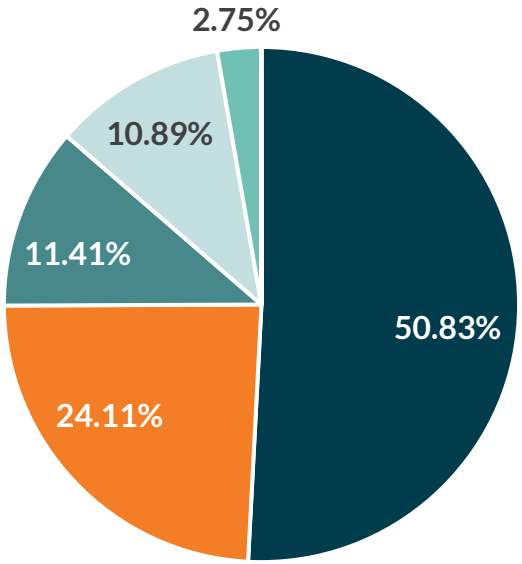


Figure 11: Last Mile Travel for Rail Transit Trip Attractions

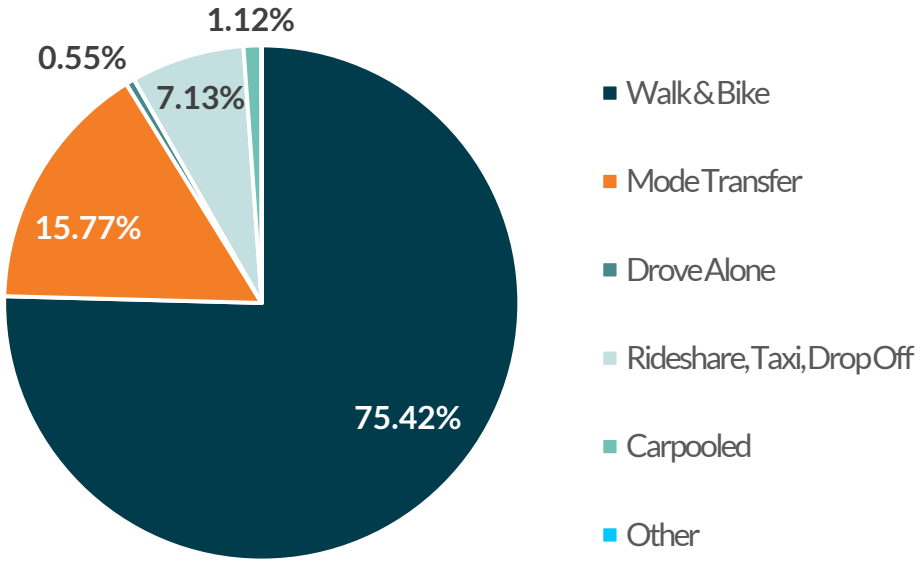


Figure Source: 2022-2023 NCTCOG Transit On-Board Survey. See *https://www.nctcog.org/trans/data/info/travel-surveys* for additional data and analysis.

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. Most transit riders are walking to destinations less than 10 minutes both to and from rail stations and their starting or ending location.

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

	First Mile Travel (Access)	Last Mile Travel (Egress)
5 Minutes or Less	47.1%	56.4%
6-10 Minutes	24.9%	24.4%
11-20 Minutes	19.7%	14.2%
21-30 Minutes	6.7%	3.5%
More than 30 Minutes	1.5%	1.5%

Table Source: 2022-2023 NCTCOG Transit On-Board Survey. See *https://www.nctcog.org/trans/data/info/travel-surveys*. for additional data and analysis.

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 2020 with the COVID-19 pandemic. Because of the significant impact of the pandemic, this report only examines post-pandemic ridership from Fiscal Year 2021 (FY 21) to Fiscal Year 2025 (FY 25).

Data source for ridership in the TOD report:

1. Average Weekday and Weekend Ridership obtained from DART, Trinity Metro, and DCTA[14]

[14] See **Data Appendix 4** for details. Information on ridership is available in DART Reference Books (https://www.dart.org/about/about-dart/about-dart/dart-facts#referenceBook). Additional ridership data is provided by DART Ridership Dashboard (https://www.dart.org/about/about-dart/service-area-city-ridership-dashboards)

Findings

Figure 12 shows the regional station area averages for weekday and weekend daily ridership from FY 21 to FY 25. Overall, rail transit has been steadily improving post pandemic. However, year-over-year ridership growth has slowed as seen in **Figure 13**. A detailed table with average weekday and weekend ridership per station from FY 21 to FY 25 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 14** shows the distribution of average weekday ridership for FY 25 across station areas and **Table 5** lists the rail transit stations with the highest and lowest average weekday ridership for FY 25. To view additional rail ridership information for each station area across the region, please visit the **NCTCOG TOD Interactive Map** under the Performance tab and select Rail Ridership.

Figure Source: DART, DCTA, Trinity Metro Fiscal Year 2021 to Fiscal Year 2025 Average Daily Weekday and Weekend Ridership. See **Appendix 4** for additional data and analysis.

Figure 12: Average Daily Station Ridership FY 21- FY 25

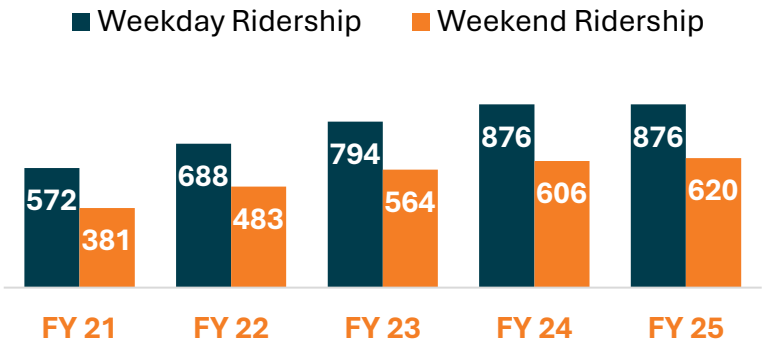


Figure 13: Year-over-year Percent Change

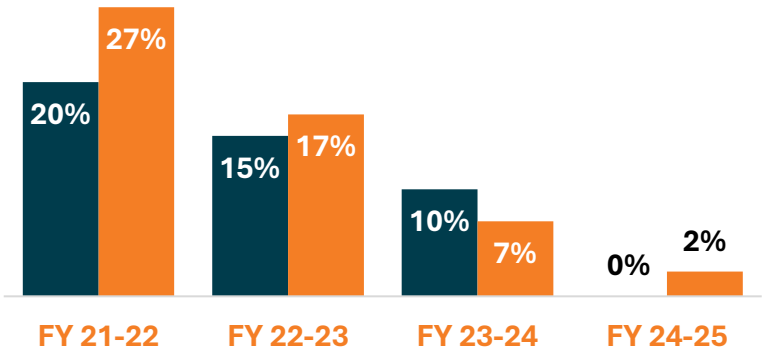


Table 5: Stations with Highest and Lowest Average Weekday Ridership for FY 25

TOP 5	
West End	6,182
Pearl/Arts District	4,378
Akard	3,892
St. Paul	2,922
Parker Road	2,223

BOTTOM 5	
MedPark	103
Hebron	84
Old Town	68
Highland Village / Lewisville Lake	49
DFW North	41

*Several Silver Line stations were under construction during the formation of this report and have no reported ridership between FY21 and FY25. See the Silver Line Project History for more details (https://www.dart.org/about/plans-projects-and-initiatives/expansion/silver-line-project-history).

Figure 14: FY 25 Average Daily Weekday Ridership*

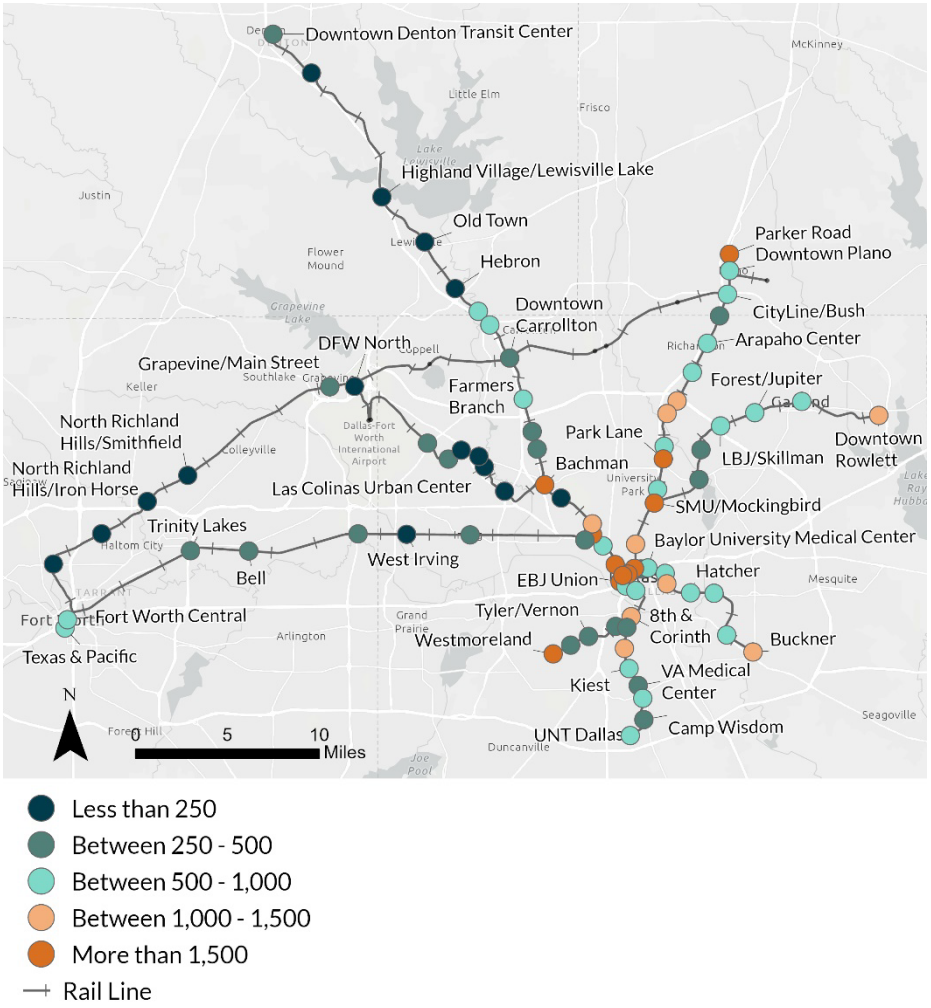


Table and Figure Source: DART, DCTA, Trinity Metro Fiscal Year 2021 to Fiscal Year 2025 Average Daily Weekday and Weekend Ridership. See **Appendix 4** for additional data and analysis.