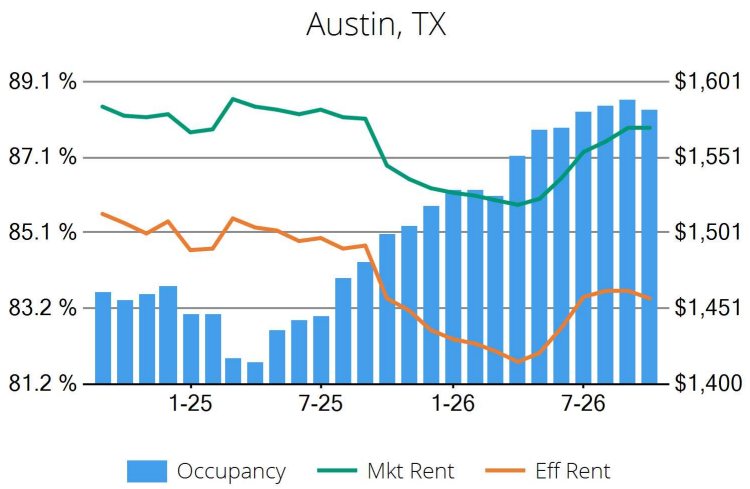
Austin, TX

End of October, 2026

General Overview

Conventional Properties	Oct 2026	Annual Chg
Occupancy	88.3	+3.3%
Unit Change	7,884	
Units Absorbed (Annual)	15,109	
Average Size (SF)	887	+0.7%
Asking Rent	$1,570	+2.0%
Asking Rent per SF	$1.77	+1.3%
Effective Rent	$1,457	+0.4%
Effective Rent per SF	$1.64	-0.3%
% Offering Concessions	63%	+23.9%
Avg. Concession Package	10.7%	-1.3%



Market Breakdown

Property Type	% of Market	# Props	# Units	Occ.	Avg SF	Average Rent Mkt	Average Rent Eff	Rent Concessions Props Offering	Rent Concessions Avg Package
Conventional	70%	1,481	296,879	88.3%	887	$1,570	$1,457	62.7%	10.7%
Affordable	20%	444	85,560	83.2%	891	$1,452	$1,343	55.6%	11.7%
Senior Living	5%	161	20,153	87.7%	833	$2,209	$2,136	30.5%	12.2%
Student Housing	5%	159	20,922	87.8%	1,035	$2,774	$2,743	14.7%	7.8%
Totals		**2,245**	**423,514**						

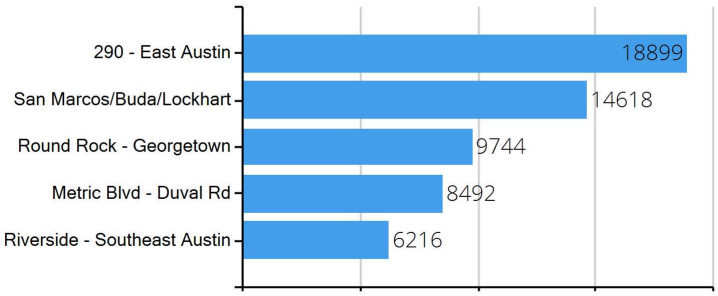
Top 5 Submarkets

Occupancy Annual Change	Oct-26	Change
Marble Falls / Burnet County	83.0%	45.7%
290 - East Austin	88.8%	16.0%
Elgin - Bastrop	87.3%	15.6%
Hutto - Taylor	77.3%	15.3%
Cedar Park - Leander - Jonestown	92.7%	10.5%

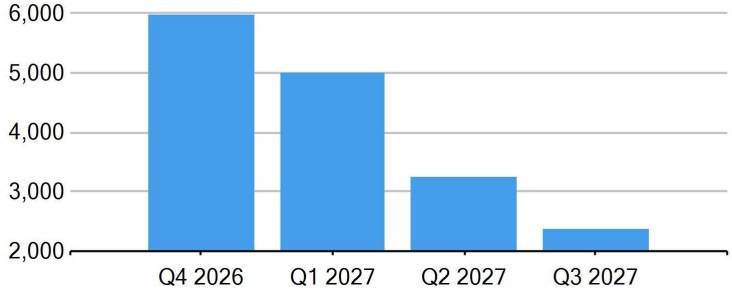
Effective Rent Gains	Oct-26	Change
Elgin - Bastrop	$1,503	7.8%
South Mopac - Barton Creek - Southwest Austin	$1,651	5.0%
620 - Anderson Mill - 2222	$1,243	4.1%
Downtown	$3,605	3.8%
North Central	$1,348	3.2%

New Units

Top 5 Submarkets with Most New Units in Pipeline



Leasing Starts Next 4 Quarters



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