Central NH Regional Planning Commission

Regional Housing Needs Assessment (RHNA)

Highlights

June 8, 2023

Annual Full Commission Meeting

RHNA Overview

- ❑ A detailed look at housing characteristics
- ❑ Projections / Fair Share Analysis
- ❑ What are the tools available to communities? The NH Housing Toolbox

RHNA Overview

Data

- ✓ 9 RPCs, NH OPD, NH Housing Finance Authority held RHNA Committees for 18 months.
- ✓ Agreed upon standardized data sets and data format for 9 RPC and State RHNAs.
- ✓ Consistently used the best available data across NH

Metric ID	Metric Name Used in CNHRPC RHNA	Outline Section	Where Located\Excel File Name
1	Total Population	IV(A)(1)	DataMetrics\1-IV(A)(1)-Total Population\SA^ 1-IV(A)(1)-Total Population
2	Group Quarters Population	IV(A)(1)	DataMetrics\2-IV(A)(1)-Group Quarters Population\^SA 2-IV(A)(1)-GroupQuartersPop
3	Population by Race/Ethnicity	IV(A)(1)	DataMetrics\3-IV(A)(1)-Population by Race/Ethnicity\^SA Pop by Race Ethnicity Dec 2020, Dec 2010 & Dec 2000 (2 files)
4	Population by Age	IV(A)(2)	ACSDataMetrics\RHNA Age\^SA USE RHNA AgeMetrics_Bulk-Calculator
6	Occupied Housing Units (Total, Occ & Vacant 2010 & 2020)	IV(A)(3)	DataMetrics\06-IV(A)(3)-Occupied Housing Units\^SA Total_Occupied_Housing
7	# Households by Size (Persons/Household) - i.e. # of 3-person H	IV(A)(3)	DataMetrics\07-IV(A)(3)-# Households by Size (Persons/Household)\^SA HH_Size
8	# Households by Type - Family vs. Non-Family	IV(A)(3)	DataMetrics\08-IV(A)(3)-# Households by Type - Family vs. Non-Family\^SA Fam_vs_NonFam
9	Households by Tenure as a Percentage of Total	IV(A)(3)	DataMetrics\09-IV(A)(3)-Households by Tenure as a Percentage of Total\^SA HouseholdsPercent_TenureRenter-Owner
10	Average Household Size by Tenure (Owner/Renter)	IV(A)(3)	DataMetrics\10-IV(A)(3)-Average Household Size by Tenure\^SA Tenure_HH_Size
12	Employment by Industry and Location	IV(A)(4)	DataMetrics\12-IV(A)(4)-Employment by Industry and Location\^SA CNHRPC2005-2019 Employment by Industry
13	Top Employers	IV(A)(5)	NHES GraniteStats - Top Employers by Planning Commission
14	Change in Labor Force and Employment	IV(A)(6)	DataMetrics\14-IV(A)(6)-Change in Labor Force and Employment\^SA Labor Force and Unemployment
15	Region	IV(A)(7)	Data Metrics\15-IV(A)(7)-Regional Commute Flows\^SA Regional Commute Flows (only for 2014 & 2019)
16	Mean Travel Time to Work	IV(A)(7)	Data Metrics\16-IV(A)(7)-Mean Travel Time to Work\^SA MeanTravelTimeToWork
17	School Enrollment	IV(A)(8)	17-IV(A)(8)-School Enrollment
18	Net Migration	IV(A)(9)	DataMetrics\18-IV(A)(9)-Net Migration\^SA Net Migration
19	Youth Under 18	IV(B)(1)	ACSDataMetrics\RHNA Age\^SA USE RHNA AgeMetrics_Bulk-Calculator
21	Homeless populations	IV(B)(1)	21-IV(B)(1)-Homeless Populations
22	Elderly/Seniors: Population that is 65 years and over	IV(B)(1)	ACSDataMetrics\RHNA Age\^SA USE RHNA AgeMetrics_Bulk-Calculator & ^SA Seniors Reference V2
24	Individuals below the poverty level, total and by race	IV(B)(1)	ACSDataMetrics\RHNAPovertybyRace\ SA^ RHNAPovertyLevelCNHRPCtrends2020
25	Families that Rent	IV(B)(1)	ACSDataMetrics\RHNAFamiliesThatRent\^SA Families_thatRentCalculator
26	Veterans	IV(B)(1)	ACSDataMetrics\RHNA_Veterans\^SA RHNA_Veterans_cnhrpc_m2020Trends
27	Minorities	IV(B)(1)	see #3 DataMetrics\03-IV(A)(1) Population by Race and Ethnicity 3 Excel docs
31	Single working-age adults: Nonfamily Households By Sex Of Hou	IV(B)(1)	ACSDataMetrics\RHNALivingAlone\^SA RHNA_LivingAlone_cnhrpc_m_2020Trends
33	Individuals below 150% of the poverty level/Working Poverty	IV(B)(1)	ACSDataMetrics\RHNA_PovertyThresholds\^SA RHNA_PovertyThresholds_cnhrpc_m_2020Trends
35	Limited English Proficiency: Population of 5 years and over that	IV(B)(1)	ACSDataMetrics\RHNA_LEP\^SA RHNA_LEP_2020Trends
36	Extremely Low-Income and Very Low-Income Households by Te	IV(B)(1)	DataMetrics\36-IV(B)(1)-Extremely Low-Income and Very Low-Income Households by Tenure\^SA Extremely Low-Incom
37	Recent Immigrants Since 2010	IV(B)(1)	Data Metrics\37-IV(B)(1)-Recent Immigrants\^SA Recent immigrants
38	Refugees by City or Town of Resettlement	IV(B)(1)	DataMetrics\38-IV(B)(1)-Refugees by City or Town of Resettlement\^SA Concord Refugees Resettlement 2012-2021
42	Persons With Disabilities	IV(B)(1)	ACSDataMetrics\RHNADisability\SA^ RHNA Disability_cnhrpc_m_2020Trends
44	Racial/Ethnic Dissimilarity Index	IV(C)(1)	DataMetrics\44IV(C)(1)-Dissimilarity Index\^SA Dissimilarity Index and Race & Ethnicity_RPCs_ACS
45	Share of population by race/ethnicity	IV(C)(1)	see #3 above
46	Racial/Ethnic dot density population distribution	IV(C)(2)	DataMetrics\44IV(C)(1)-Dissimilarity Index\^SA Dissimilarity Index and Race & Ethnicity_RPCs_ACS
48	# Of Bedrooms	IV(D)(1)	ACSDataMetrics\RHNA_BedroomsInUnit\^SA BedroomsInUnit Bulk Calculator
49	Total Housing Units	IV(D)(1)	Data Metrics\49-IV(D)(1)-Total Housing Units\^SA TotalHousingUnits
53	Total Vacant Housing Units	IV(D)(2)	53-IV(D)(2)-Vacant Housing Units
55	Number of Units Authorized by Building Permit since 1970 - sing	IV(D)(4)	55-IV(D)(4)- # of Units Authorized by Building Permitsince 2000 - single-, multi-family
56	Age of Housing Stock – owner occupied; renter occupied by year built; % pre-1940	IV(D)(5)	
59	Number of Assisted/Subsidized Housing Units: PH, PBV, LIHTC –	IV(E)(1)	59-IV(E)(1) Assisted Housing Units\^SA 95 Assisted Housing
60	Median Household Income	IV(F)(1)(i)	ACS DataMetrics\RHNA_MedianHouseholdIncome\^SA_MedianIncome_Bulk_Calculator
62	Households By Income Level and Tenure - Renters: 30%/50%/60%/80%/100% AMI; Owners: 60%/80%/100% AMI	IV(F)(1)(iii)	DataMetrics\62-IV(F)(1)(iii) Households By Tenure and AMI\^SA Households by Tenure and AMI
64	NHHFA purchase price trends – MLS monthly median sales price by region, 2009-2022	IV(F)(2)(ii)	DataMetrics\64-IV(F)(2)(ii)-Purchase Prices\^SA MLS MonthIt MedianSold Prices
65	NHHFA gross rent survey –median gross rents; distribution of rents	IV(F)(2)(iii)	65-IV(F)(2)(iii)_IV(D)(2) Gross_Rent_Vacancy_Rates
66	Renter Cost Burden by Income Level	IV(F)(3)(i)	66-IV(F)(3)(i)-Renter Cost Burden by Income Level
67	Ownership Cost Burden by Income Level	IV(F)(3)(i)	67-IV(F)(3)(i)-Ownership Cost Burden by Income Level
71	Affordability by Occupation, by RPC for Avg Wage, Avg Rent, Avg	IV(F)(3)(iii)	DataMetrics\90-Affordability By Occupation\^SA Affordability by Occupation by RPC 2022
75	NHHFA Housing Choice Voucher Data	IV(F)(3)(v)	DataMetrics\75-IV(F)(3)(v)-NHHFA Housing Choice Voucher Data\4 ^SA Excel docs
76	Municipal Equalized Property Tax Rates ($ per $1,000 valuation)	IV(F)(3)(v)	76-IV(F)(3)(v)-Municipal Equalized Property Tax Rates\^ SA Municipal Equalized Prop Tax Rates
77	# Households/persons participating in NH Housing Rental Relief Program, administered by NHHFA	IV(F)(3)(vi)	77-IV(F)(3)(vi)-Emergency Rental Assistance Program\^SA By MUN
79	Housing Gap Analysis based on Vacancy Rates	IV(F)(4)(ii)	79-IV(F)(4)(ii)- Housing Gap Analysis
83	Housing Needs Projections By Income, Unit Type, Age, Tenure	V(B)	
84	Fair Share Distribution – what is each community's fair share of the regional need?	V(C)	84-Fair Share Distribution
85	Map high opportunity areas in the region - Visual representations showing race/ethnicity/concentrations of COIs in comparison to areas of opportunity.	VI(E)(2)	
91	Housing Unit Condition by REGION		DataMetrics\91-Housing Condition\^SA HouseCondition_CHAS_2019
92	Income required to afford mortgages		92- Income To Afford Mortgages
G5	Population Projections by County and NH to 2050		Use for ^83

RHNA Overview

Data: Some Interesting Findings!

- ✓ Mostly American Community Survey and 2020 Census data was used for RHNA.
- ✓ Additional OPD, NHHFA, & other best sources used.
- ✓ Usually 3 date comparisons: like 2010, 2015 & 2020 to establish trends.

Fast Housing Facts of the Central NH Region, 2020*

- ❑ **2020 population is 120,515 (up from 115,160 in 2010, 4.7%).** *Decennial*
- ❑ **2020 $86,369 is average median household income (up from $69,144 in 2010).** *ACS*
- ❑ **2020 total housing units is 50,647 (up from 49,440 in 2010, 2.4%).** *ACS*
- ❑ **2020 median age is 45.2, up from 43.7 in 2015 and 41.7 in 2010.** *ACS*
- ❑ **2019 total jobs is 64,843, most of which are in Health Care/Social Services (18.5%) and Public Administration (15.1%).** *Census OntheMap*
- ❑ **2020 has 6.3% unemployment rate, up from 6.0% in 2010.** *NHELMI*
- ❑ **2020 29% of owners are housing cost burdened (17% of renters).** *Decennial*
- ❑ **2022 median rent is $1,309 (2 bedroom) while the median home price is $350,000. Most entry-level and many experienced positions are unable to afford rent while most experienced positions cannot afford to buy a home.** *Root Policy*

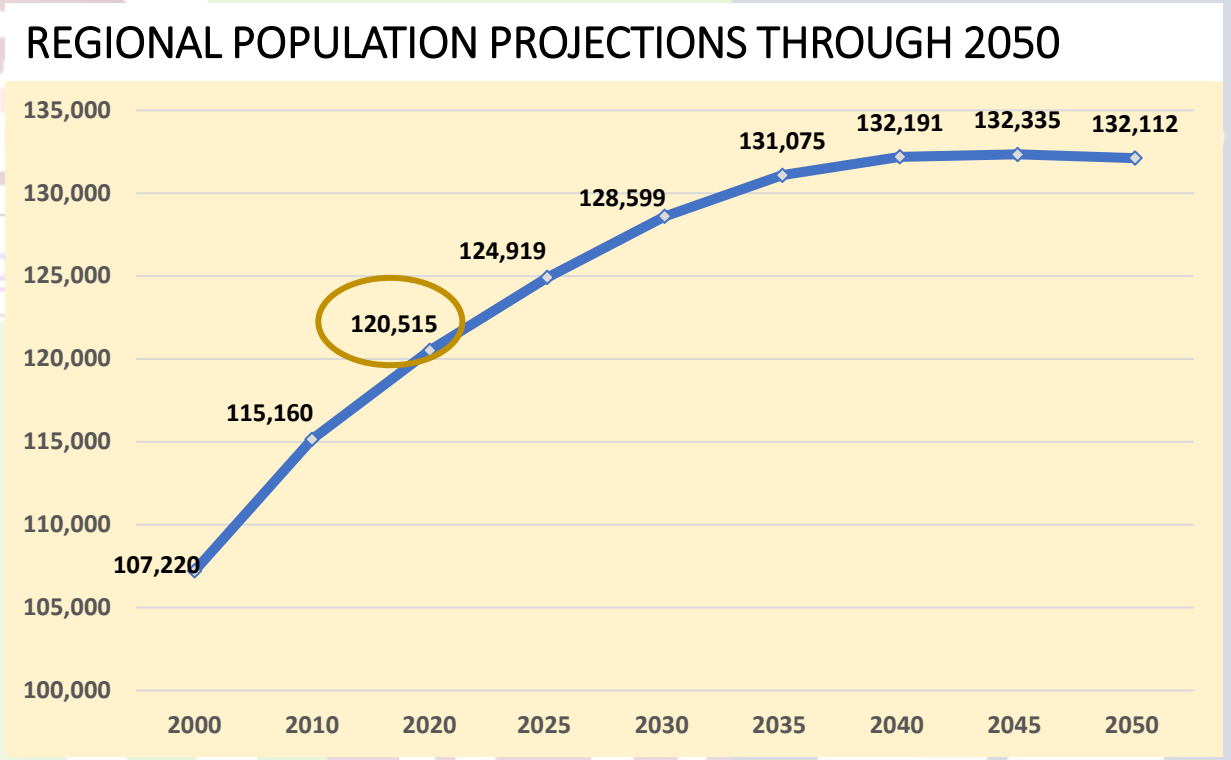
Fast Fact Housing Projections of the Central NH Region, 2025-2040

- ❑ **2040 population is projected to level off at 0% growth.**
- ❑ **By 2025 number of new housing units needed: 3,207 (2,044 owner units, 983 rental units).** *Root Policy*
- ❑ **By 2040 total number of new housing units needed: 8,215 (about 483 new units annually).** *Root Policy*

** US Census Bureau Decennial survey counts differ from Census American Community Survey estimates which are based on sample population surveys produced every 1-5 years.*

RHNA Overview

Municipality	2020 Census	2025	2030	2035	2040	2045	2050	% Growth 2020-2050
Allenstown	4,707	4,883	5,031	5,131	5,175	5,180	5,171	9.9%
Boscawen	3,998	4,143	4,265	4,346	4,383	4,387	4,379	9.5%
Bow	8,229	8,530	8,783	8,953	9,028	9,037	9,021	9.6%
Bradford	1,662	1,722	1,773	1,807	1,822	1,824	1,820	9.5%
Canterbury	2,389	2,473	2,543	2,591	2,611	2,614	2,609	9.2%
Chichester	2,665	2,759	2,838	2,891	2,914	2,917	2,912	9.3%
Concord	43,976	45,611	46,986	47,907	48,316	48,363	48,277	9.8%
Deering	1,904	1,985	2,048	2,093	2,117	2,124	2,122	11.4%
Dunbarton	3,005	3,108	3,195	3,254	3,279	3,282	3,277	9.1%
Epsom	4,834	5,006	5,151	5,249	5,292	5,297	5,288	9.4%
Henniker	6,185	6,393	6,567	6,684	6,736	6,742	6,731	8.8%
Hillsborough	5,939	6,186	6,373	6,507	6,579	6,599	6,594	11.0%
Hopkinton	5,914	6,128	6,309	6,429	6,483	6,489	6,478	9.5%
Loudon	5,576	5,767	5,928	6,035	6,083	6,088	6,078	9.0%
Pembroke	7,207	7,463	7,678	7,822	7,886	7,893	7,880	9.3%
Pittsfield	4,075	4,220	4,342	4,423	4,460	4,464	4,456	9.3%
Salisbury	1,422	1,472	1,515	1,543	1,556	1,557	1,555	9.4%
Sutton	1,978	2,047	2,105	2,144	2,161	2,163	2,159	9.2%
Warner	2,937	3,043	3,133	3,193	3,220	3,223	3,217	9.5%
Webster	1,913	1,980	2,036	2,073	2,090	2,092	2,088	9.1%
Central NH Region Total	**120,515**	**124,919**	**128,599**	**131,075**	**132,191**	**132,335**	**132,112**	**9.6%**

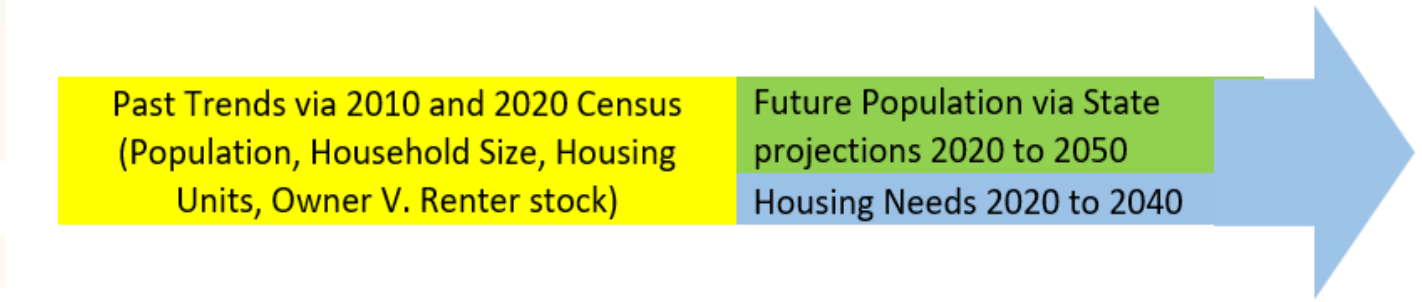


Data: Some Interesting Findings!

RHNA Overview

Fair Share

- Past trends + future projections = Housing Needed 2020 to 2040.
- Broken down to renter and owner counts and "affordable" within each community.



Total Units Per Community			
Total Renter Units		Total Owner Occupied Units	
Renter Below 60% AMI	Renter Above 60% AMI	Owner Below 100% AMI	Owner Above 100% AMI

RHNA Overview

Fair Share

- For the CNHRPC region, at total of 8,125 housing units are needed by 2040, of which, about one third would be rental units.
- This would break down to about 483 units per year, region wide.
- Of the 2040 rental units, about 28% would need to be affordable.
- Of the 2040 owner-occupied units, about 31% would need to be affordable.
- A few examples locally, would mean about 7 new units per year in Webster, 24 in Pembroke, and 164 in Concord.

RHNA Overview

Toolbox: Each Tool Has…

- ❑ "What is it?"
- ❑ "How Can it Help?"
- ❑ "Getting Started"
- ❑ "Considerations"
- ❑ "Issues Addressed"
- ❑ "Related Tools"
- ❑ "State Law"
- ❑ "Case Studies"

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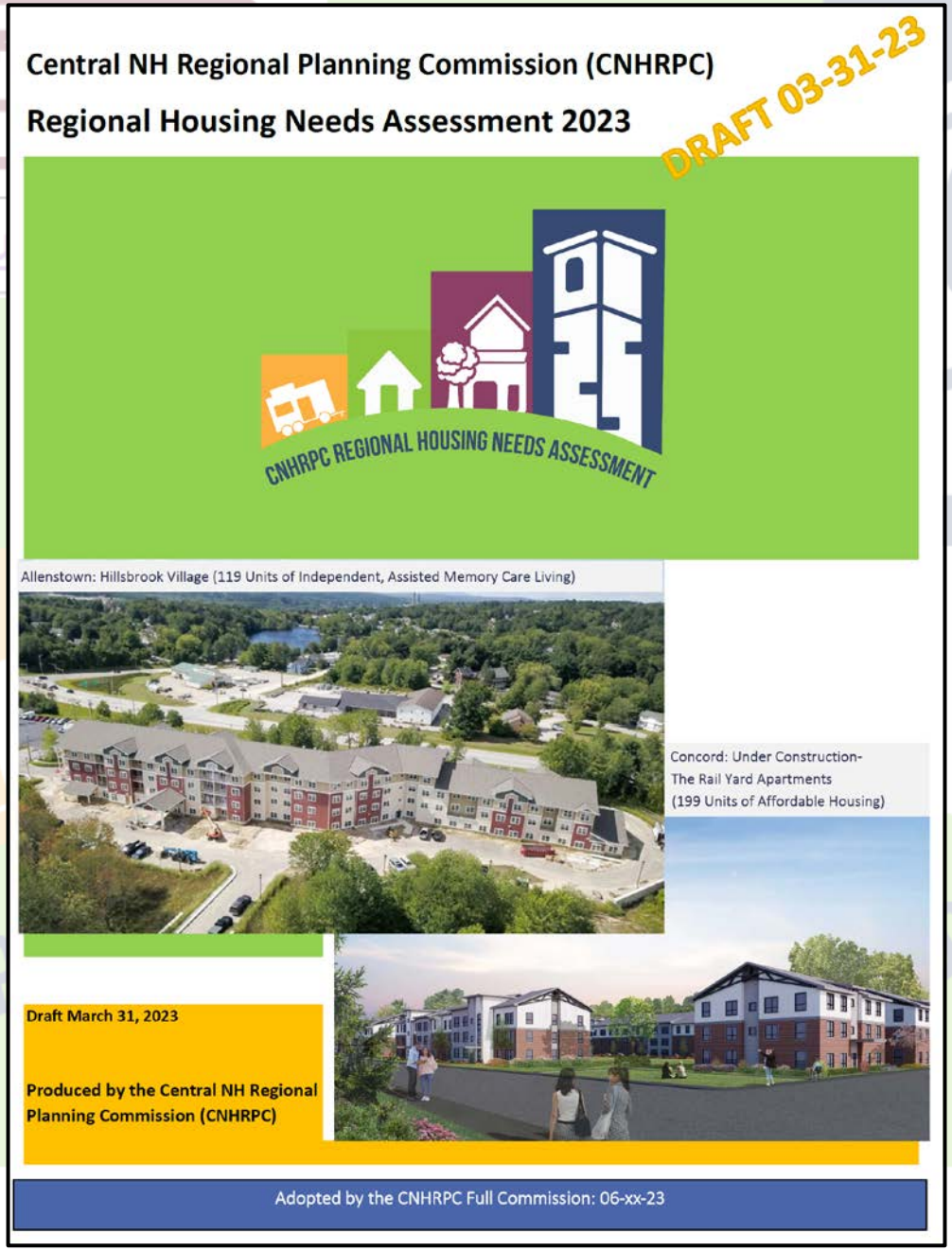
Central NH Regional Planning Commission

Approval sought for Regional Housing Needs Assessment (RHNA)

June 8, 2023

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