

ESTIMATES AND TRENDS IN NEW HAMPSHIRE'S HOUSING SUPPLY

Update: 2021

Ken Gallager, Office of Planning and Development

New Hampshire State Data Center

- NH liaison to U.S. Census Bureau
- Distributes and interprets US Census data
- Supplies state data to the Census
- Conducts annual population estimates

New Hampshire Population Estimates Program

- RSA 78-A:25 directs the Office of Planning and Development (OPD) to **“estimate annually the resident population for all cities and towns...as of July 1 of the preceding year”**, and to certify to the state treasurer on or before August 19
- Purpose is to determine the distribution of the state meals and rooms tax to municipalities
- But the population estimates serve many other purposes

Components of State Population Estimates

- Previous decennial census
- Change in dwelling units
- Change in group quarters population
- The 2021 estimates (coming this summer) will be the first to use the 2020 census population and dwelling unit counts in the formula

Dwelling Unit Method

- HU2020: Number of housing units at 2020 Census
- HU2021: Number of housing units permitted by each municipality
 - Permits are issued in 2020, and resulting new housing units are classified as “built” in 2021
- OCC: 2020 Occupancy rate
- PPH: 2020 Population per household
- Example:

$$((\text{HU2020} + \text{HU2021}) \times \text{OCC}) \times \text{PPH} = \text{HHPOP2021}$$

$$(4,309 + 46)$$

$$4,355 \quad \times \quad 0.576$$

$$2,545 \quad \times \quad 2.38 = \mathbf{6,047}$$

Sample Dwelling Unit Survey

- Permits issued during Calendar Year 2020
- Assume constructed by July 1, 2021
- As of this report, we now publish the multi-family numbers as 2 family, 3-4 family, and 5+ family

2020 DWELLING UNIT RESPONSE FORM New Hampshire Office of Planning and Development

Building Official
Town of Blanchard
P.O. Box 1
Blanchard, NH 03999
Redbird County

Address Correction (if different from what is listed):

Completed by (please print clearly)

Title

Signature

Telephone Number

E-mail Address

Last year the response form was completed by: **Octavius Vanderplaet, Building Official**

NOTE: The Office of Planning and Development is interested only in permits that change the number of residential dwelling units in your community. Permits for alterations (room additions, decks/porches, sheds, etc.) or non-residential garages should not be tabulated on this form. If your community does not have a permit system in place, please use the best comparable information available (i.e., certificate of occupancy).

CALENDAR YEAR 2020
(January 1, 2020 through December 31, 2020)
Please review the instructions on the back of this form.

PERMITS ISSUED THAT RESULTED IN NEW RESIDENTIAL DWELLING UNITS	NEW RESIDENTIAL CONSTRUCTION		RESIDENTIAL DEMOLITIONS		EXPIRED RESIDENTIAL PERMITS FROM 2019 NOT RESULTING IN A NEW BUILDING FOR 2020 (see back of form)		FOR OSI USE ONLY
	NUMBER OF BUILDINGS	NUMBER OF DWELLING UNITS	NUMBER OF BUILDINGS	NUMBER OF DWELLING UNITS	NUMBER OF BUILDINGS	NUMBER OF DWELLING UNITS	TOTAL UNITS
1 Family*	20	20	3	3			17
2 Family**	3	6					6
3 or 4 Family	2	8					8
5+ Family							
Conversions***	2	3					3
Manufactured Housing	1	1	4	4			-3
TOTAL HOUSING UNITS	28	38	7	7			31

* Excluding manufactured housing.

** A new single family home with an ADU attached is counted as 2 family.

*** Conversions: Count only the number of residential units created or lost. Examples of conversions include: (a) conversion of a single family house to a multifamily house (increasing the number of dwelling units), (b) construction of accessory dwelling units (increasing the number of dwelling units), and (c) conversion of a residence to an office or restaurant or other non-residential use (decreasing the number of dwelling units – enter this number in the demolitions column).

Should you have questions, please contact Ken Gallager, Principal Planner, at 271-2155 or kenneth.r.gallager@livefree.nh.gov

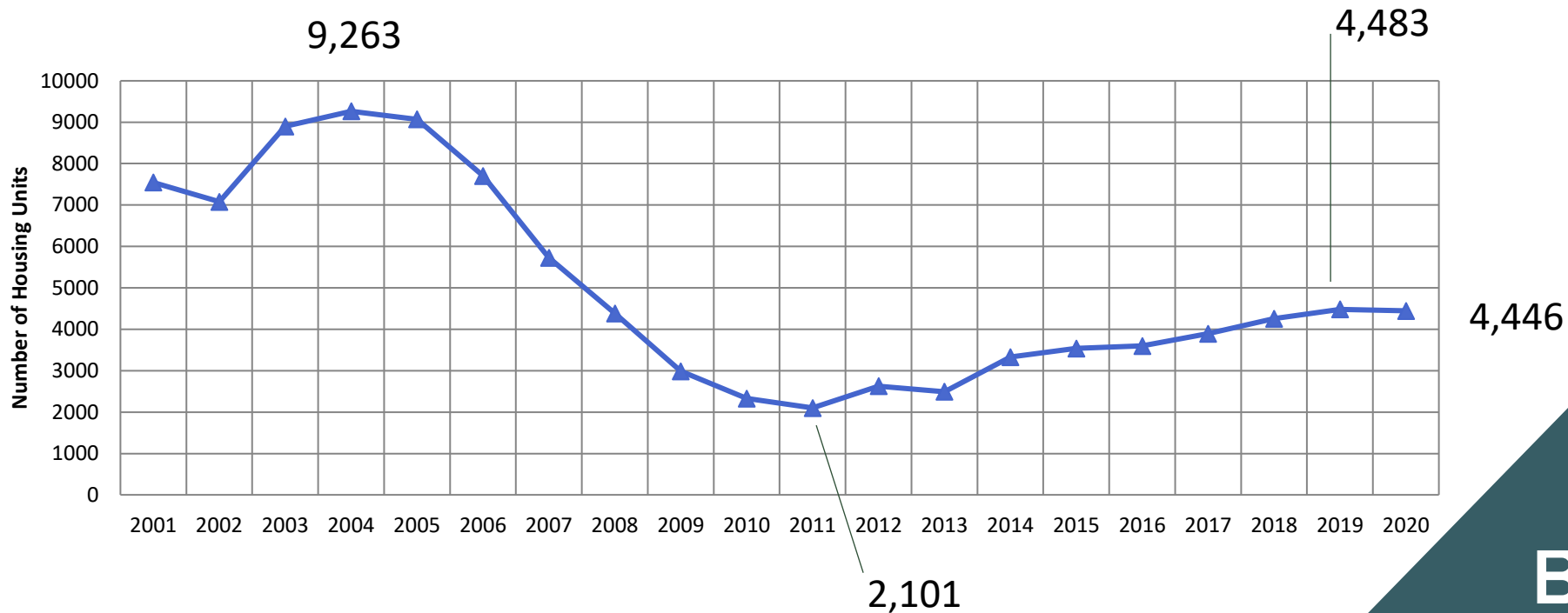
BEA

New Hampshire Department of
BUSINESS AND
ECONOMIC AFFAIRS

Results

- Slight decrease in total units constructed from preceding year
- Previous low point was in 2011; high point before that was in 2004; more than twice the current amount

**Net Annual Increase in Housing Units
in New Hampshire, 2001-2020**
Based on Building Permits Issued



Permits issued – State totals

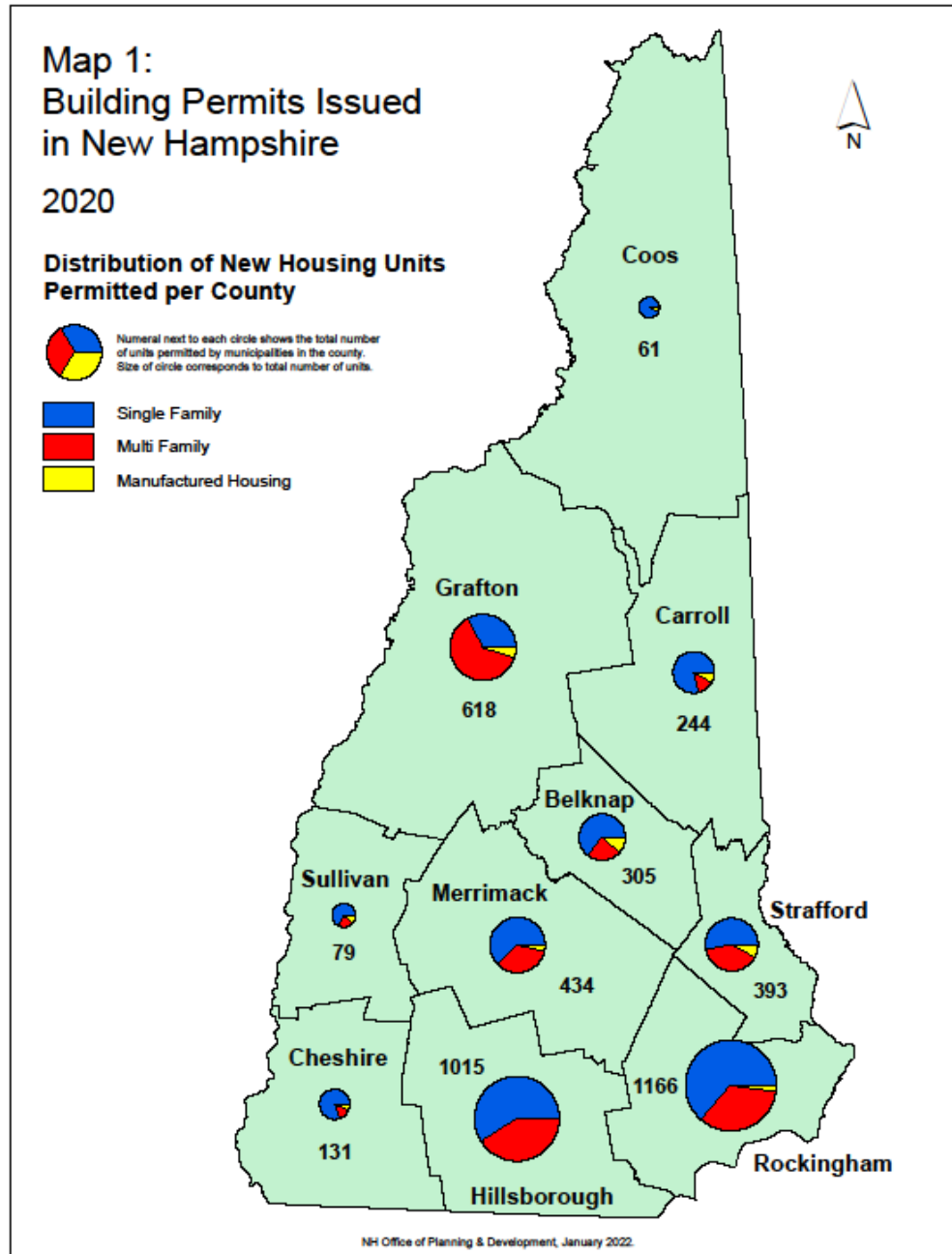
- 2020 – Permits issued for 4,446 dwelling units:
 - Single-family: 2,631 (59.2%)
 - Multi-family: 1,635 (36.8%)
 - 2 units: 233
 - 3-4 units: 127
 - 5+ units: 966
 - Conversions: 309
 - Manufactured housing: 180 (4.0%)
- 2019 – Single-family 50.4%, Multi-family 47.3%, Manufactured 2.3%
- 2010 – Single-family 66.4%, Multi-family 31.8%, Manufactured 1.8%

Differences by county

- Most single-family units permitted:
 - Rockingham (742), Hillsborough (595), Merrimack (272), Strafford (209)
- Most multi-family units permitted:
 - Hillsborough (414), Rockingham (398), Grafton (385), Strafford (154)
- One county (Grafton) issued permits for more multi-family than single-family housing
- Four counties (Belknap, Cheshire, Grafton, Merrimack) issued more permits for multi-family than in previous year

County Overview

More permits issued than 2019 in Belknap, Cheshire, Grafton, Merrimack, and Sullivan counties



Municipalities

- Most single-family units permitted:
 - Milford (115), Londonderry (92), Salem (67), Merrimack (58), Rochester (55)
- Greatest increase in single-family as percentage of existing stock:
 - Brentwood (44, 3.49%), Milford (115, 3.26%), Candia (41, 2.80%), Danville (30, 2.32%), Lincoln (10, 2.25%), Brookline (39, 2.12%)
- Most multi-family units permitted:
 - Lebanon (345, 8.31%), Hudson (94, 3.13%), Manchester (92, 0.28%), Bedford (91, 5.62%), Dover (86, 1.05%)

Takeaways

- Total of 4,446 new units is nearly level with last year's number (4,483).
- NH Housing Finance Authority cites need for 20,000-30,000 new units to meet demand (March 2020 Housing Report)
- Most housing growth continues to be in the southeast
 - 49% of state's new housing units are in Hillsborough and Rockingham counties
 - Change in multi-family proportions is highly dependent on number of individual projects
- This new report breaks out multi-family into subcategories

Accessing the Data

- Report:
 - <https://www.nh.gov/osi/data-center/documents/housing-estimates-trends.pdf>
- Data:
 - <https://www.nh.gov/osi/data-center/documents/hse2020-2029.xlsx>

Thank you!

- Ken Gallager, Principal Planner:
 - kenneth.r.gallager@livefree.nh.gov
 - (603) 271-1773
- NH State Data Center:
 - <https://www.nh.gov/osi/data-center>
 - Stay tuned: new website/URL coming soon

Regional Housing Needs Assessment

- Project website, which includes public survey about housing needs in your region:
 - <https://www.nharpc.org/rhna/>

