

Planning Lunches at Noon (PLAN) Monthly Webinar Services

Welcome to the PLAN Monthly Webinar Series!
The webinar will begin shortly.

Check out our Planning and Zoning Training website page for:

- Slides and recording of all completed webinars in the PLAN series
- Schedule for upcoming webinars
- A short, anonymous online survey to gather feedback and topics for future webinars

www.nh.gov/osi/planning/planning-training.htm

HOUSING TRENDS IN NEW HAMPSHIRE: DIVING INTO THE DATA

Webinar Logistics

Presentation then Question and Answer session

- ▶ Type questions into Chat box
- ▶ Raise hand
- ▶ We will be **recording** the presentation portion of this webinar.



Agenda

- Estimates and Trends in New Hampshire's Housing Supply
 - Ken Gallager, Principal Planner, OPD
- Data from the New Hampshire Regional Housing Needs Assessments
 - Rachel Dewey, Senior Data Analyst, Strafford Regional Planning Commission
 - Zachary Swick, Senior GIS Analyst, Southern New Hampshire Planning Commission

ESTIMATES AND TRENDS IN NEW HAMPSHIRE'S HOUSING SUPPLY

Update: 2022

Ken Gallager

Office of Planning and Development

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 (2020)
- Change in dwelling units
- Change in group quarters population

Dwelling Unit Method

- HU2021: Estimated number of housing units in 2021
- HU2022: Number of housing units permitted by each municipality
 - Permits are issued in 2021, and resulting new housing units are classified as “built” in 2022
- OCC: Occupancy rate reported at 2020 census
- PPH: Population per household as of 2020 census
- Example:

$$\begin{array}{r} ((\text{HU2021} + \text{HU2022}) \times \text{OCC}) \times \text{PPH} = \text{HHPOP2022} \\ (4,309 + 46) \\ 4,355 \quad \times \quad 0.576 \\ 2,545 \quad \times \quad 2.38 = \mathbf{6,047} \end{array}$$

Sample Dwelling Unit Survey

- Permits issued during Calendar Year 2021
- Assume constructed by July 1, 2022
- We now publish the multi-family numbers as 2 family, 3-4 family, and 5+ family
- Conversions are assigned to 2-family category for consistency

2021 DWELLING UNIT RESPONSE FORM New Hampshire Office of Planning and Development

Building Official
Town of Pilkington
P.O. Box 1948
Pilkington, NH 03000
Montcalm 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: Freda Verlonius, 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 2021
(January 1, 2021 through December 31, 2021)
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 2020 NOT RESULTING IN A NEW BUILDING FOR 2021 (see back of form)		FOR OPD 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*	41	41	9	9	3	3	29
2 Family**	2	4					4
3 or 4 Family							
5+ Family	2	12					12
Conversions***		3					3
Manufactured Housing	1	1	2	2			-1
TOTAL HOUSING UNITS	46	61	11	11	3	3	47

* 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).

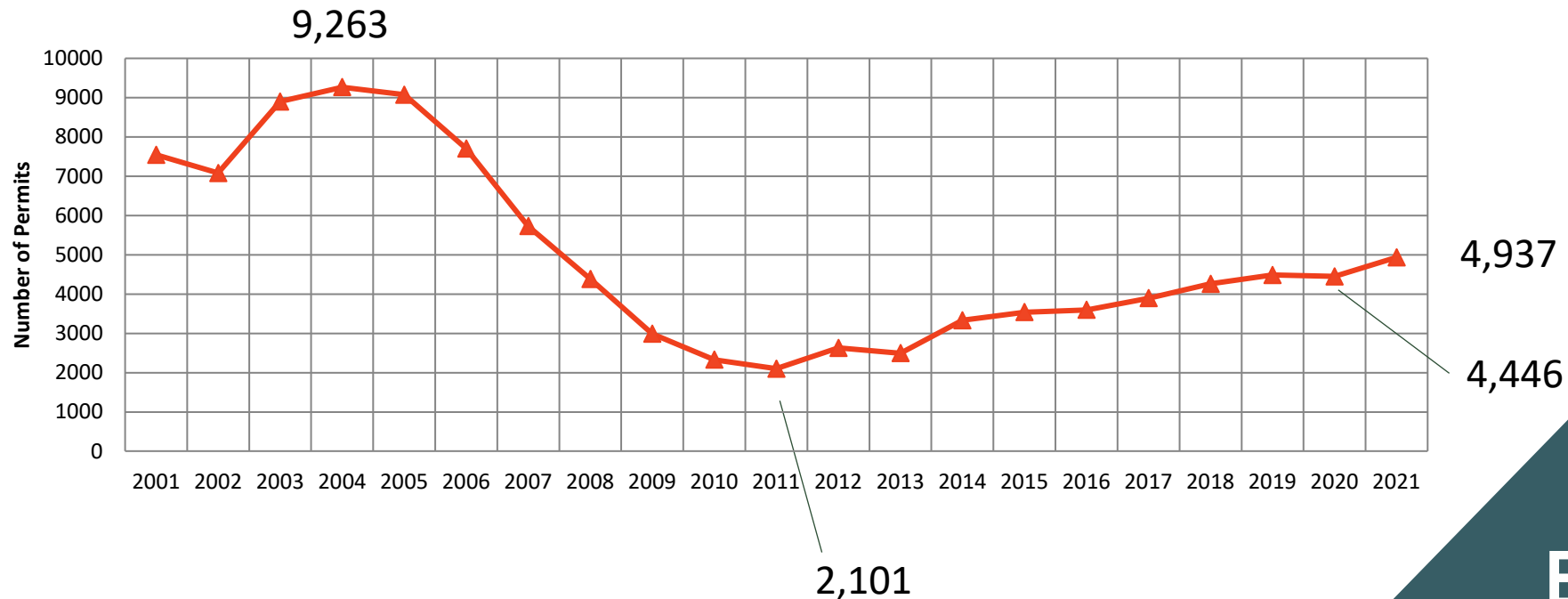
Should you have questions, please contact Ken Gallager, Principal Planner, at 271-1773 or kenneth.r.gallager@livefree.nh.gov

Submit completed form to:
Office of Planning & Development
100 N. Main Street, Suite 100
Concord, NH 03301
Email: kenneth.r.gallager@livefree.nh.gov

Results

- 11.0% increase in total units constructed from preceding year
- Previous low point was in 2011; high point before that was in 2004; current year's number is a bit more than half the 2004 number

**Net Annual Increase in Housing Units
in New Hampshire, 2001-2022**
Based on Building Permits Issued



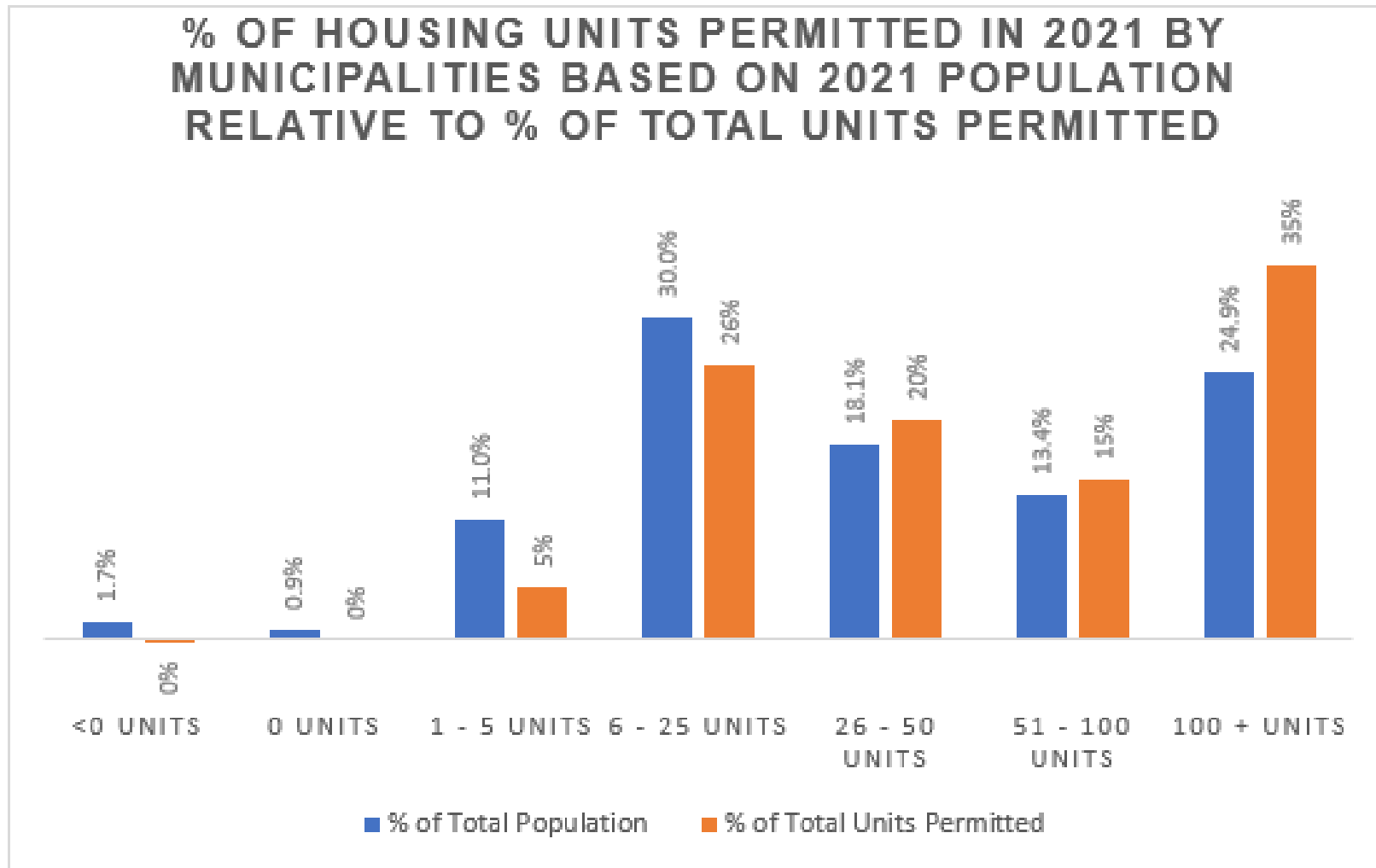
Impact on housing goals

- Permits have increased 9.5% annually on average since 2011
- **IF** increases continue at same rate for rest of decade, there would be 76,646 new housing units by 2030
- NH Housing Finance Authority projects need for 66,538 new units by 2030
 - Including 59,934 new year-round units
 - Based on projected population growth, and on target 5% rental vacancy rate and 2% ownership vacancy rate by 2040
- Impact of \$100 million InvestNH initiative not yet reflected in permit numbers
- Also be aware that 618 units were permitted in a single town (Merrimack); could be a “blip”

Patterns of permitting

- In 2021, the largest communities in the state permitted a greater share of the total housing units than their percentage of the population
- 17 communities (38.3% of NH population) permitted 50% of total housing units
- 7 of these permitted over 100 units:
 - Merrimack (618)
 - Nashua (376)
 - Londonderry (200)
 - Rochester (152)
 - Concord (134)
 - Manchester (124)
 - Epping (114)

Permitting patterns, contd.



Permits issued – State totals

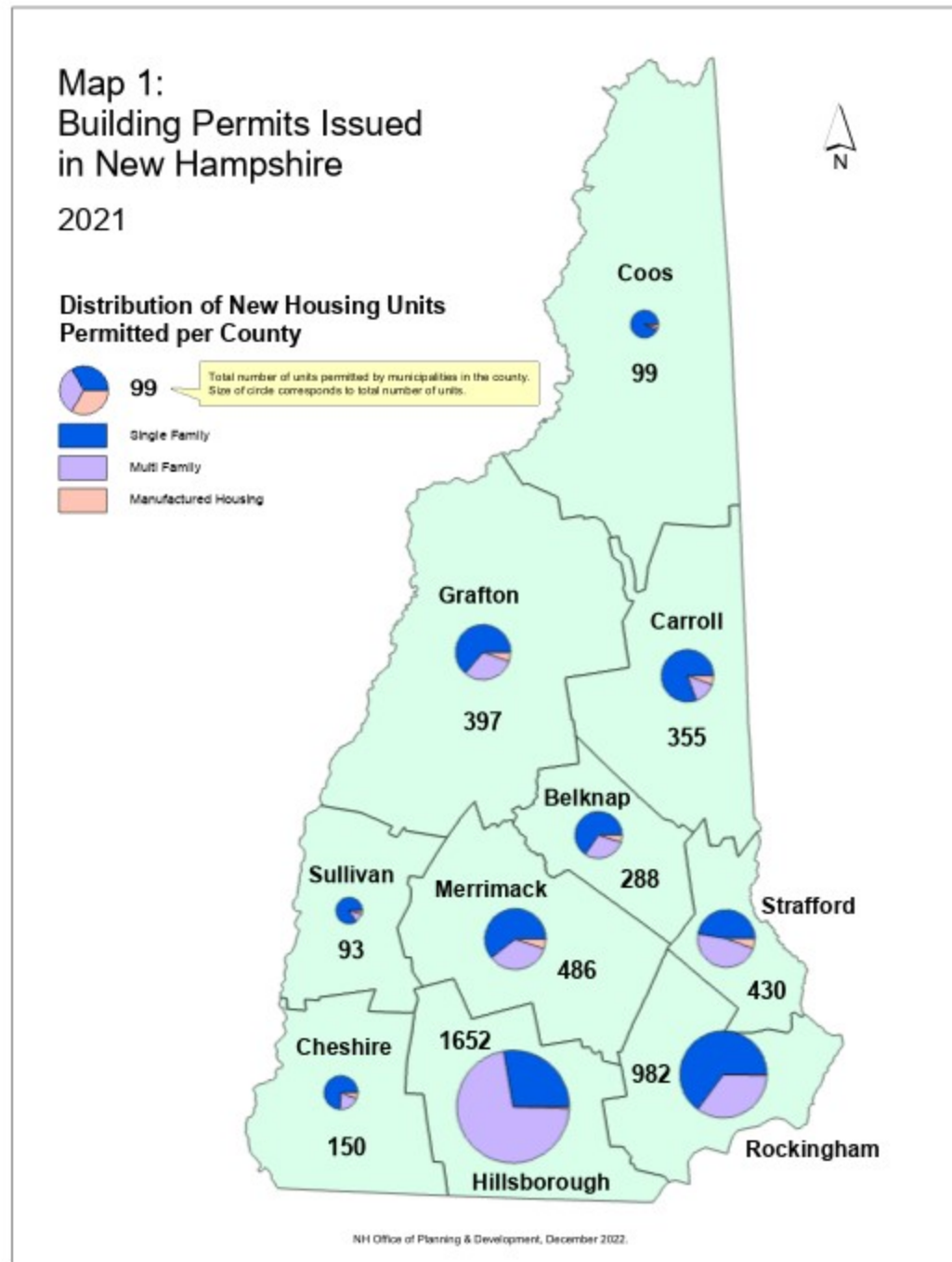
- 2021 – Permits issued for 4,937 dwelling units:
 - Single-family: 2,603 (52.7%)
 - Multi-family: 2,204 (44.6%)
 - 2 units: 327
 - 3-4 units: 151
 - 5+ units: 1,380
 - Conversions: 346
 - Manufactured housing: 130 (2.6%)
- 2020 – Single-family 59.2%, Multi-family 36.8%, Manufactured 4.0%
- 2010 – Single-family 66.4%, Multi-family 31.8%, Manufactured 1.8%

Differences by county

- Most single-family units permitted:
 - Rockingham (637), Hillsborough (456), Merrimack (294), **Carroll** (286)
- Most multi-family units permitted:
 - Hillsborough (1,188), Rockingham (343), Strafford (202), Merrimack (167)
- One county (Hillsborough) issued more permits for multi-family than single-family housing
- Seven counties (Belknap, Carroll, Cheshire, Coos, Hillsborough, Merrimack, Strafford) issued more permits for multi-family than in previous year
- Six counties (Carroll, Cheshire, Coos, Grafton, Merrimack, and Sullivan) issued more single-family permits than in previous year

County Overview

More permits were issued than 2020 in Carroll, Cheshire, Coos, Hillsborough, Merrimack, Strafford and Sullivan counties



Municipalities

- Most single-family units permitted:
 - Londonderry (117), Hooksett (65), Merrimack (58), Rochester (54), Raymond (50)
- Greatest increase in single-family as percentage of existing stock:
 - Waterville Valley (6, 4.61%), Thornton (38, 3.02%), Franconia (20, 2.89%), Lincoln (13, 2.87%), Errol (10, 2.62%), Carroll (11, 2.26%)
- Most multi-family units permitted:
 - Merrimack (560, 5.25%), Nashua (337, 0.85%), Concord (117, 0.61%), Manchester (104, 0.24%), Rochester (90, 1.04%)

Takeaways

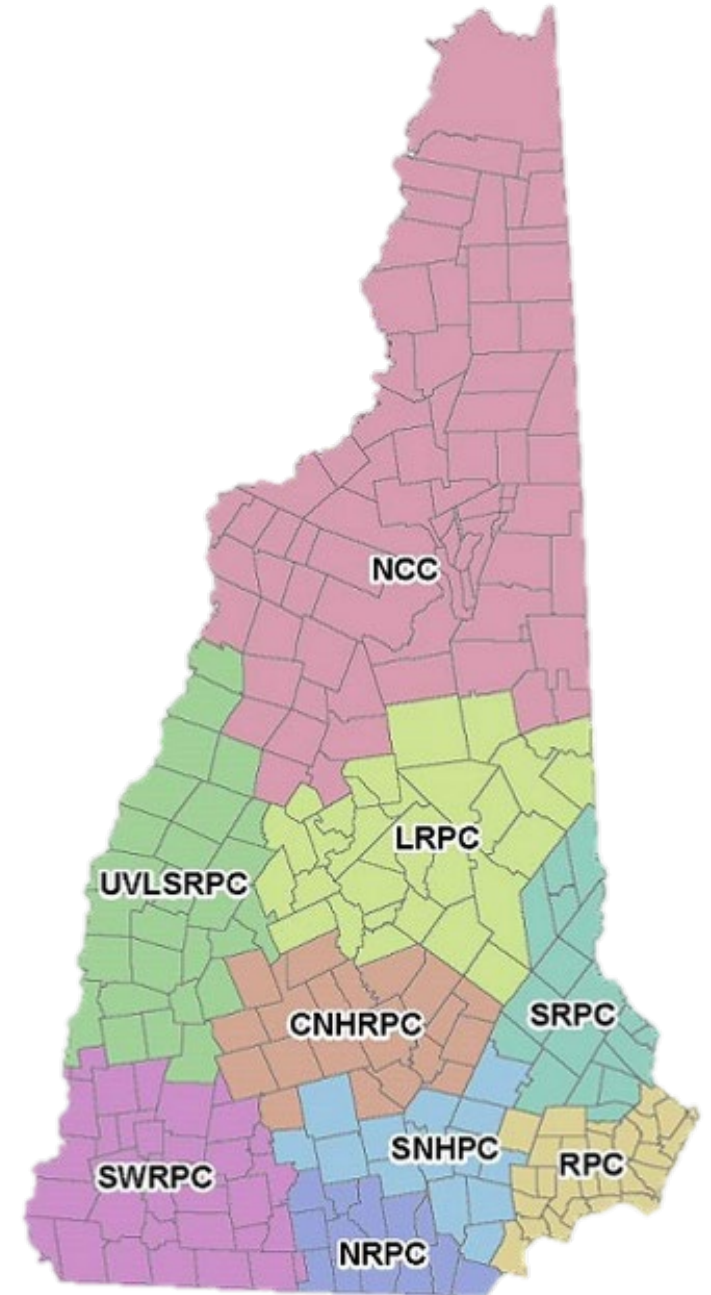
- Total of 4,937 new units is an 11% increase from last year's number (4,446).
- 9.5 annual increase since 2011; if continued to 2030, it would more than meet the goal of 66,538 new housing units by then
- Subsequent years could easily alter the growth trajectory, however
- 50% of housing growth occurs in just 17 communities, representing just 38% of the state's current population
- While growth remains largest in the southeast, higher than usual growth seen in Carroll County and in communities around the White Mountains

Housing Trends in New Hampshire: Diving into the Data

- Overview and Statewide Trends (Rachel)
- Strafford Data (Rachel)
- Southern NH Data (Zach)

Regional Planning Commissions

- Established under NH RSA 36:45
- 9 RPCs in NH
- RPCs cover all 234 municipalities in the state
- Plus, all village districts and unincorporated places



What Is A Housing Needs Assessment?

- Analysis of housing needs and data trends (supply and demand)
- Resource to promote better housing policies
- Mandated function of RPCs per RSA 36:47
 - Intended to assist municipalities local master plan development
 - To be updated every 5 years

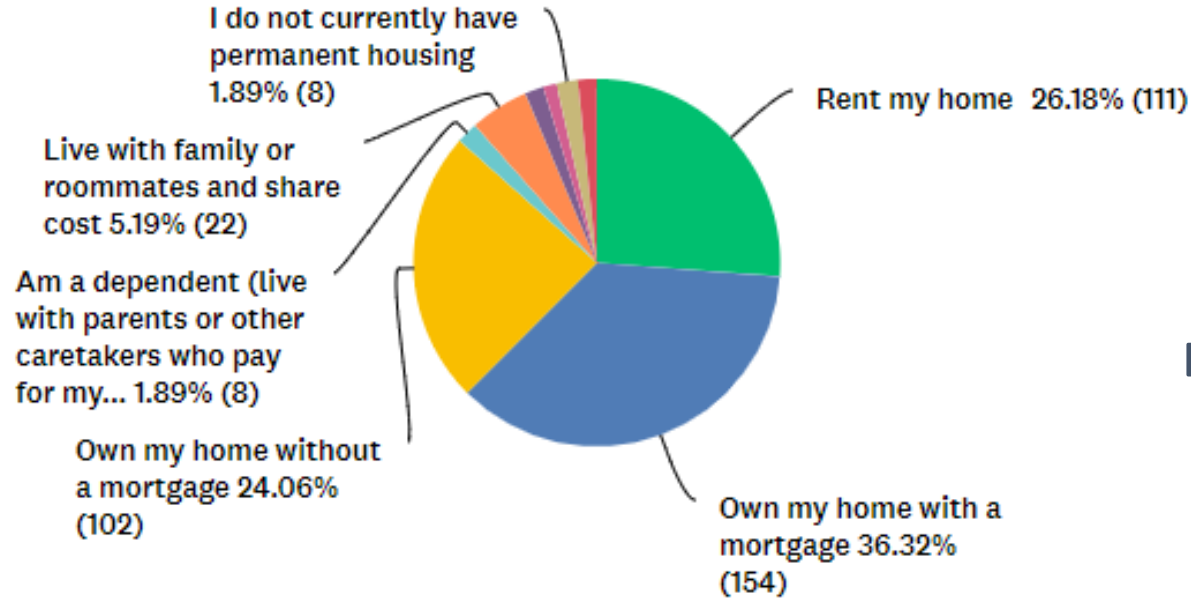
Regional Housing Needs Assessment Project

- All 9 RPCs completing our RHNAs at the same time using the same general structure
- Allows us to use consistent surveys, data, and research
- Ensures that the resulting plans have region-specific spins on comparable information that adds up to NHHFA's statewide assessment

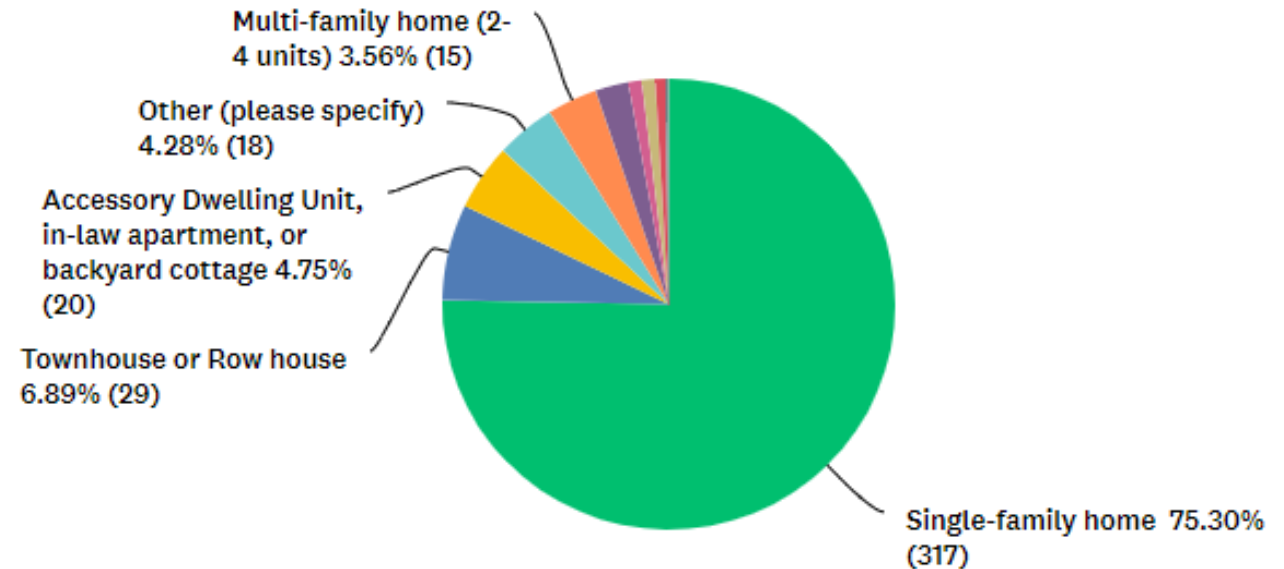


Current vs Future Housing

Current Housing



Desired Future Housing



Public Perspectives on the Housing Shortage & Land Use

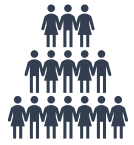


Figure 3-3 - Results from open-ended questions of public survey indicating a nearly even split between three groups of thought with the overwhelming sentiment being in support of finding a balance (Appendix A1).

Condition and Trend Data

- Identified about 80 metrics
- Used methodologies from previous RHNA's and other projects
- Each RPC took the lead on calculating or pulling data for some of the metrics
- Data and GIS staff at the RPCs met regularly

Statewide Trends



Population is
increasing



Population
is aging



Average Household
Size is Declining



Housing production
has slowed



Units available for sale &
rent are declining

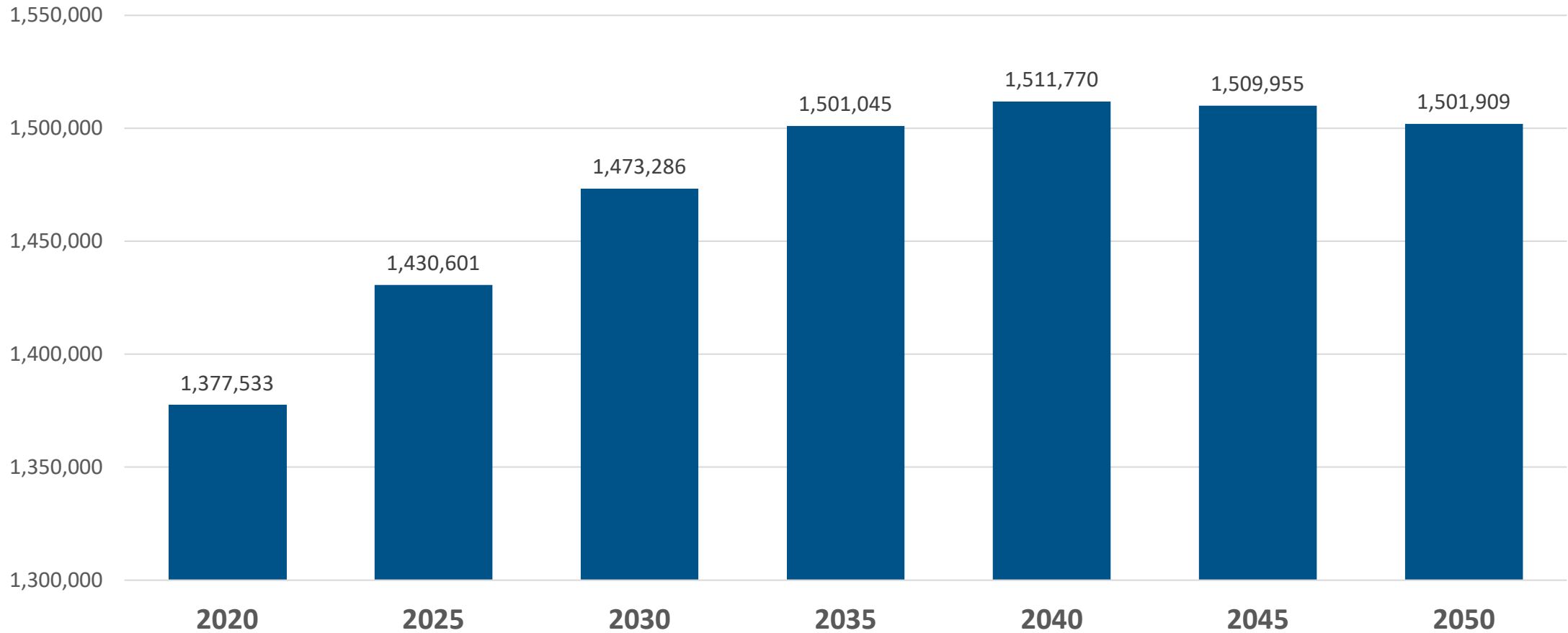


Cost of housing
is increasing



Population is increasing

Projected Population: 2020 - 2050



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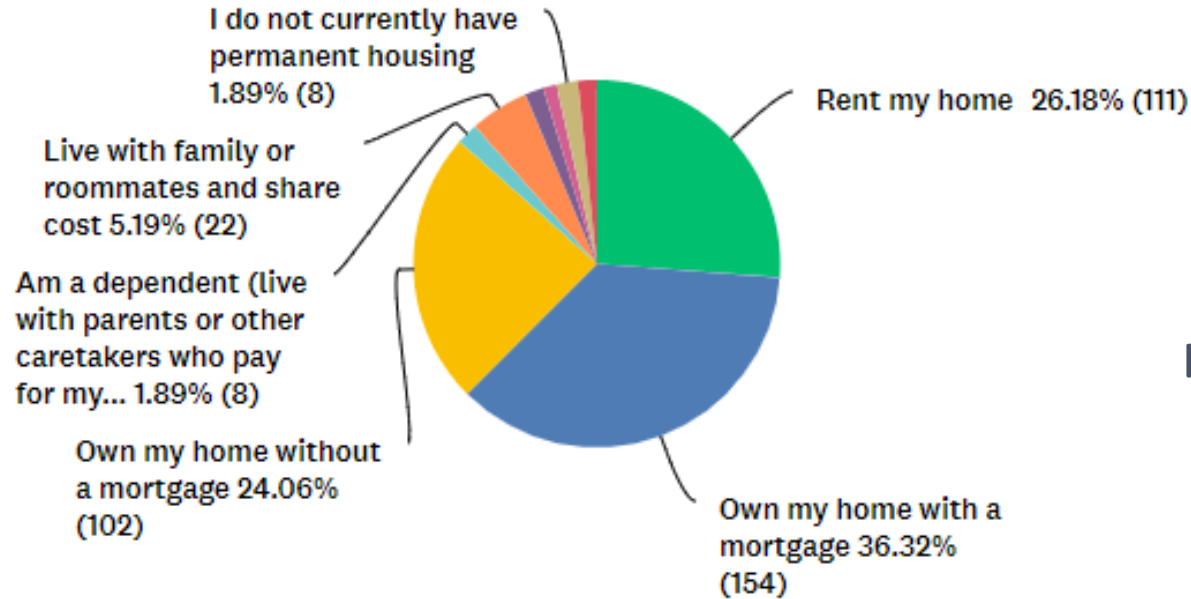
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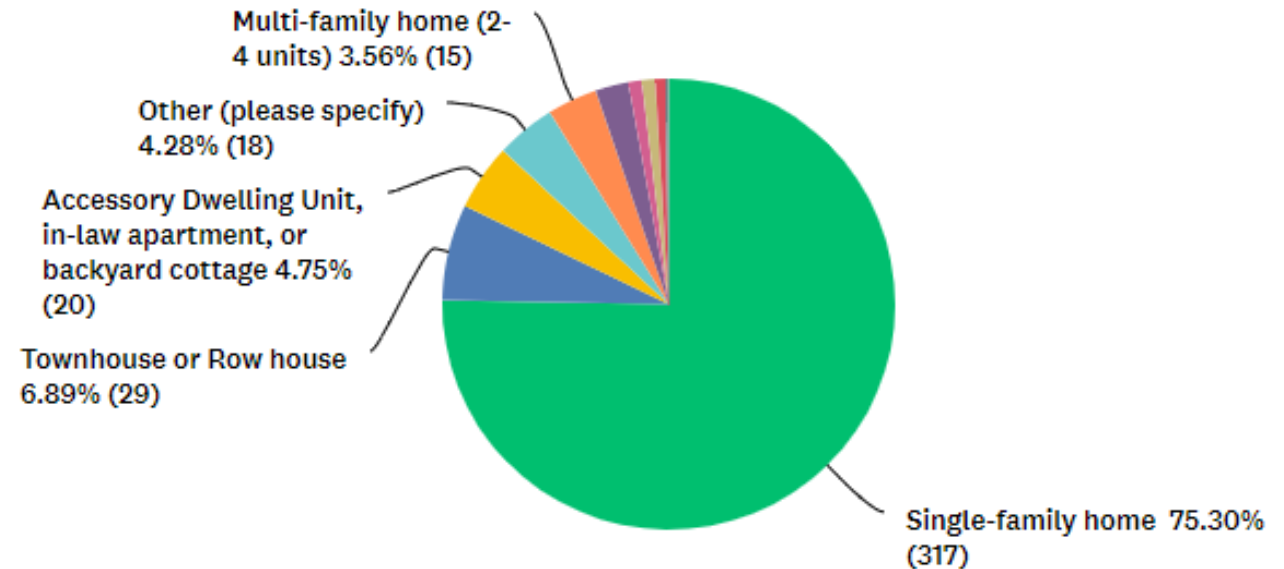


Current vs Future Housing

Current Housing



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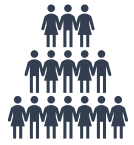


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Statewide Trends



Population is increasing



Population is aging



Average Household Size is Declining



Housing production has slowed



Units available for sale & rent are declining

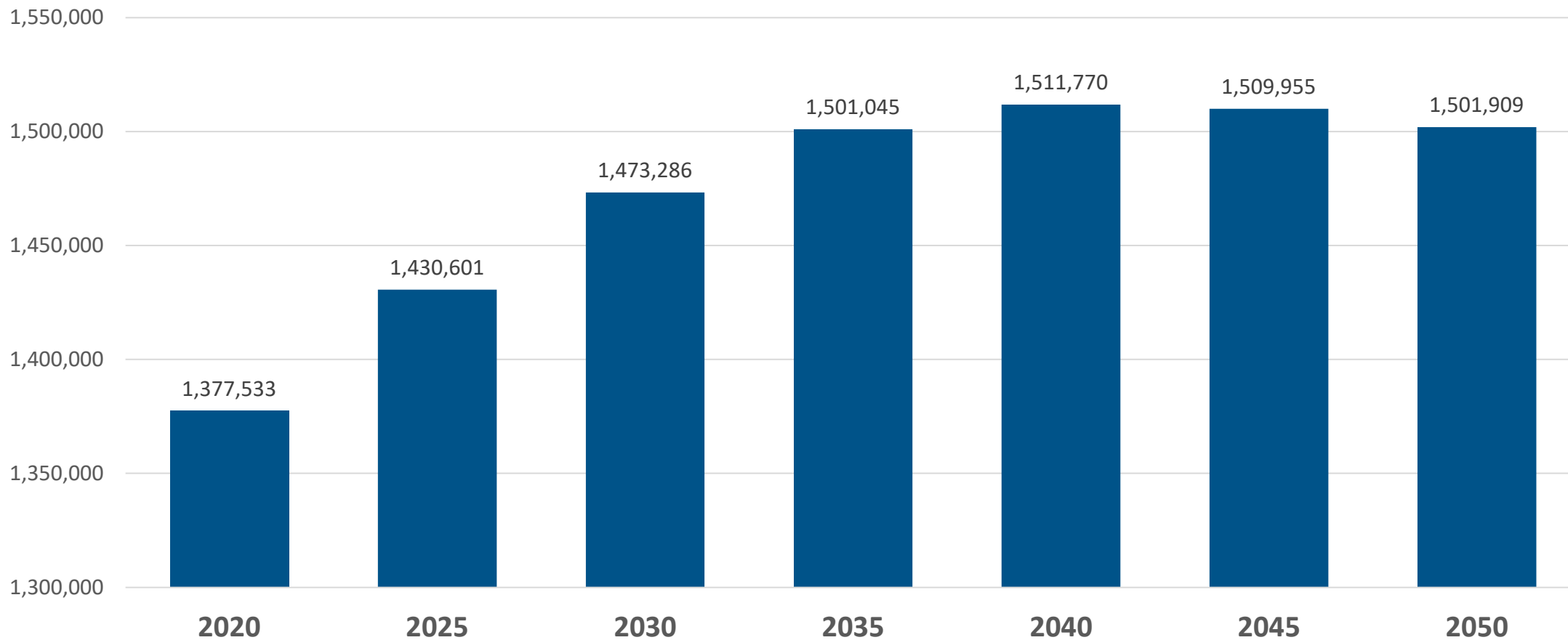


Cost of housing is increasing



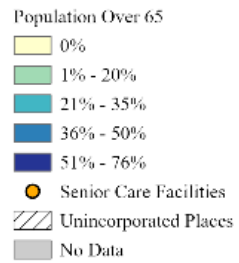
Population is increasing

Projected Population: 2020 - 2050

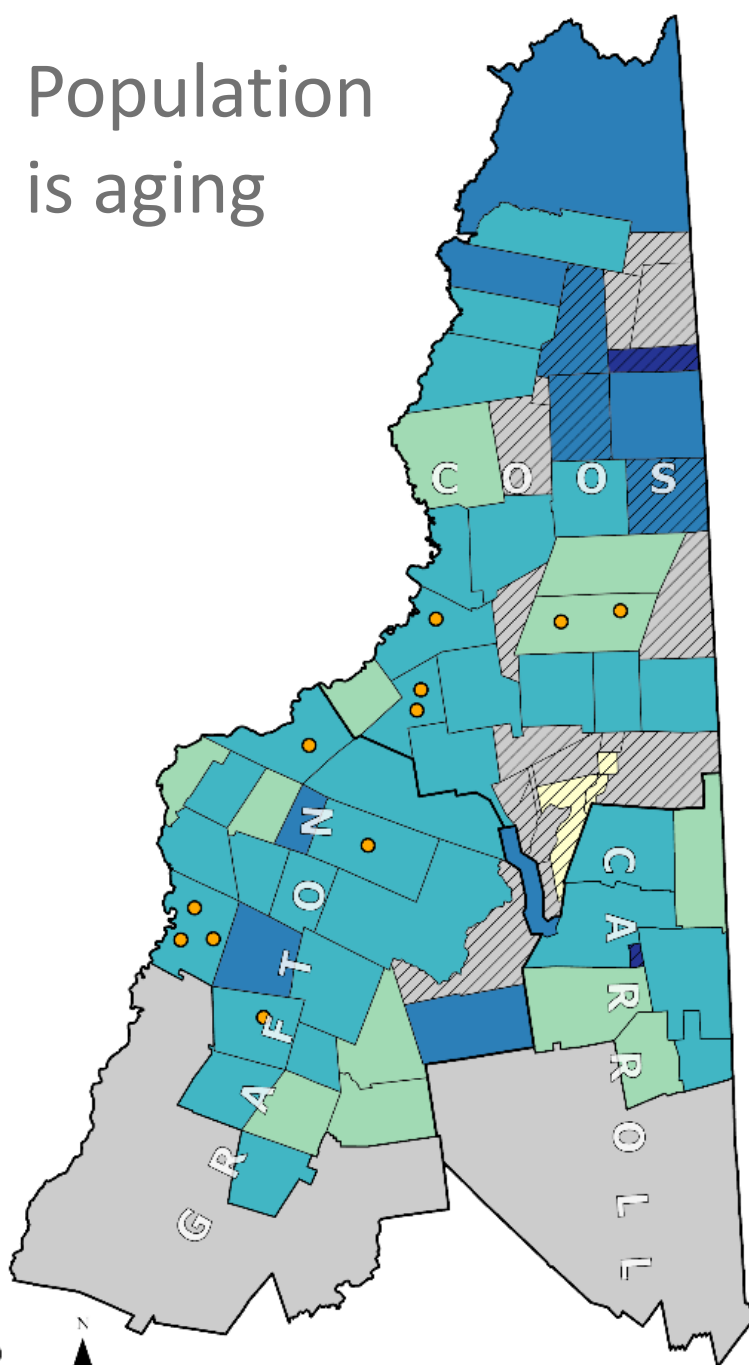
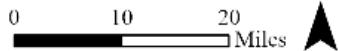




Population is aging



Unincorporated Places have low populations that can lead to skewed results.



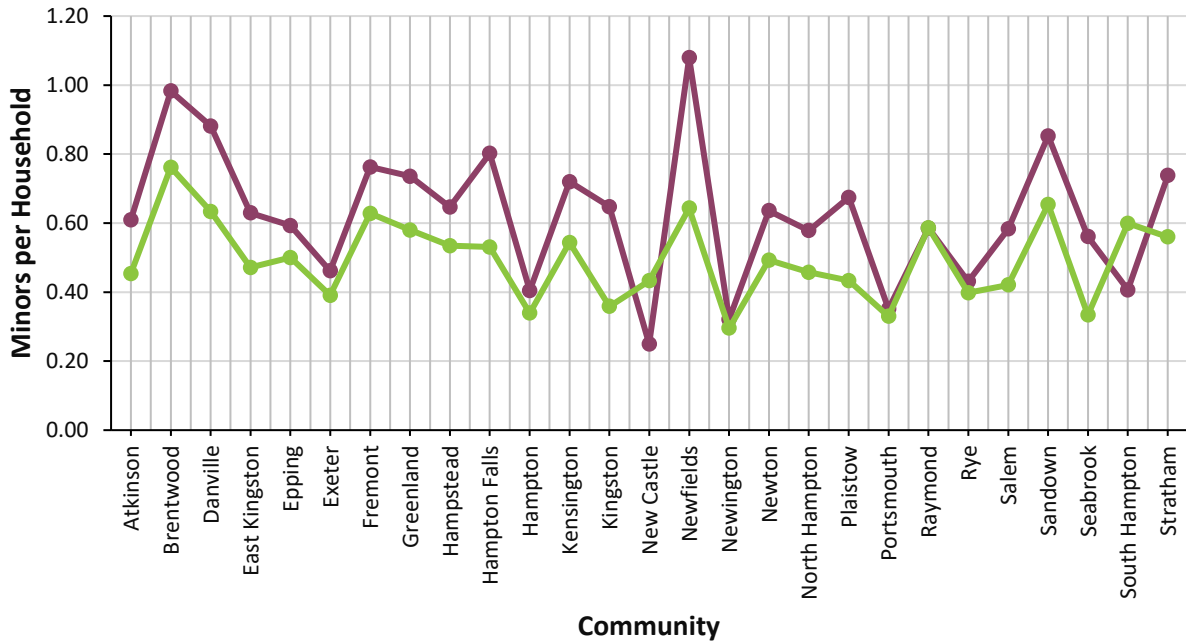


Population is aging

Number of Minors per Household by Community (RPC)

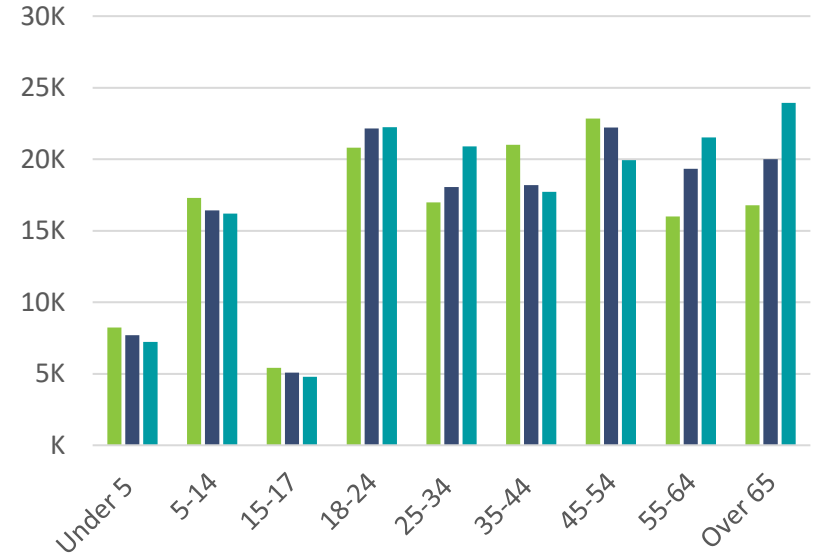
2010 & 2020

● 2010 ● 2020



Population by Age (SRPC)

■ 2010 ■ 2015 ■ 2020

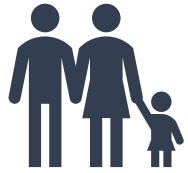




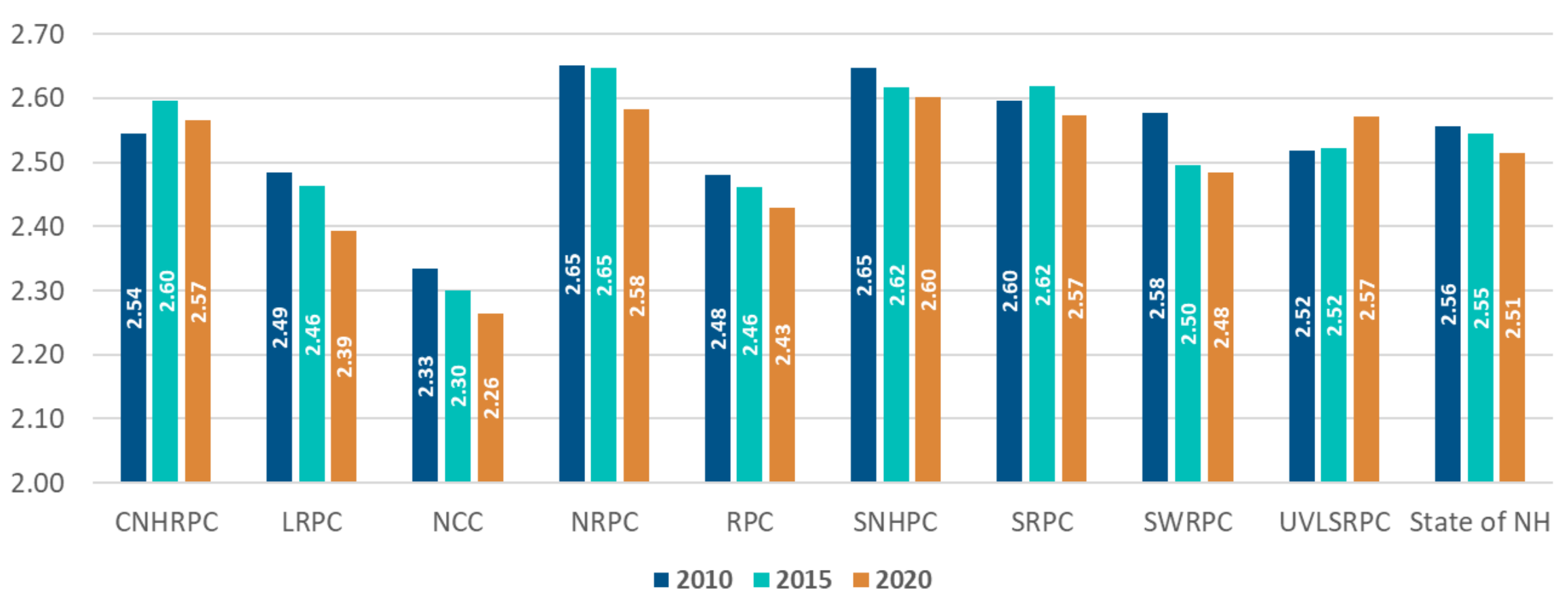
Population is aging

The average age is increasing
in many communities.

	2010	2015	2020
Town	Average Age	Average Age	Average Age
Atkinson	47.5	47.5	51.9
Brentwood	40.4	42.8	42.1
Danville	40	41.5	42.8
East Kingston	45	44.1	52.8
Epping	39.3	41.7	46.9
Exeter	46.6	43.9	47.6
Fremont	38.5	43.9	44
Greenland	42.3	45.4	46.5
Hampstead	43.4	46.4	44
Hampton Falls	41.8	44.9	46.4
Hampton	46.3	49.7	50.3
Kensington	43.7	47.2	46.6
Kingston	40.4	46	47.5
New Castle	55.1	57.2	56.8
Newfields	39.1	41.8	47.2
Newington	50	53.7	51.5
Newton	40.1	38.8	44.7
North Hampton	42.5	49	50.2
Plaistow	43.2	42.5	44.2
Portsmouth	38.5	41.2	41.5
Raymond	40.4	39	40.5
Rye	49.1	54.5	55.6
Salem	42.3	43.5	45.1
Sandown	36.8	40.8	40.2
Seabrook	46.7	49	49.7
South Hampton	45.8	49.5	44.8
Stratham	42.1	44.5	48.2
RPC Region	43.2	45.6	47

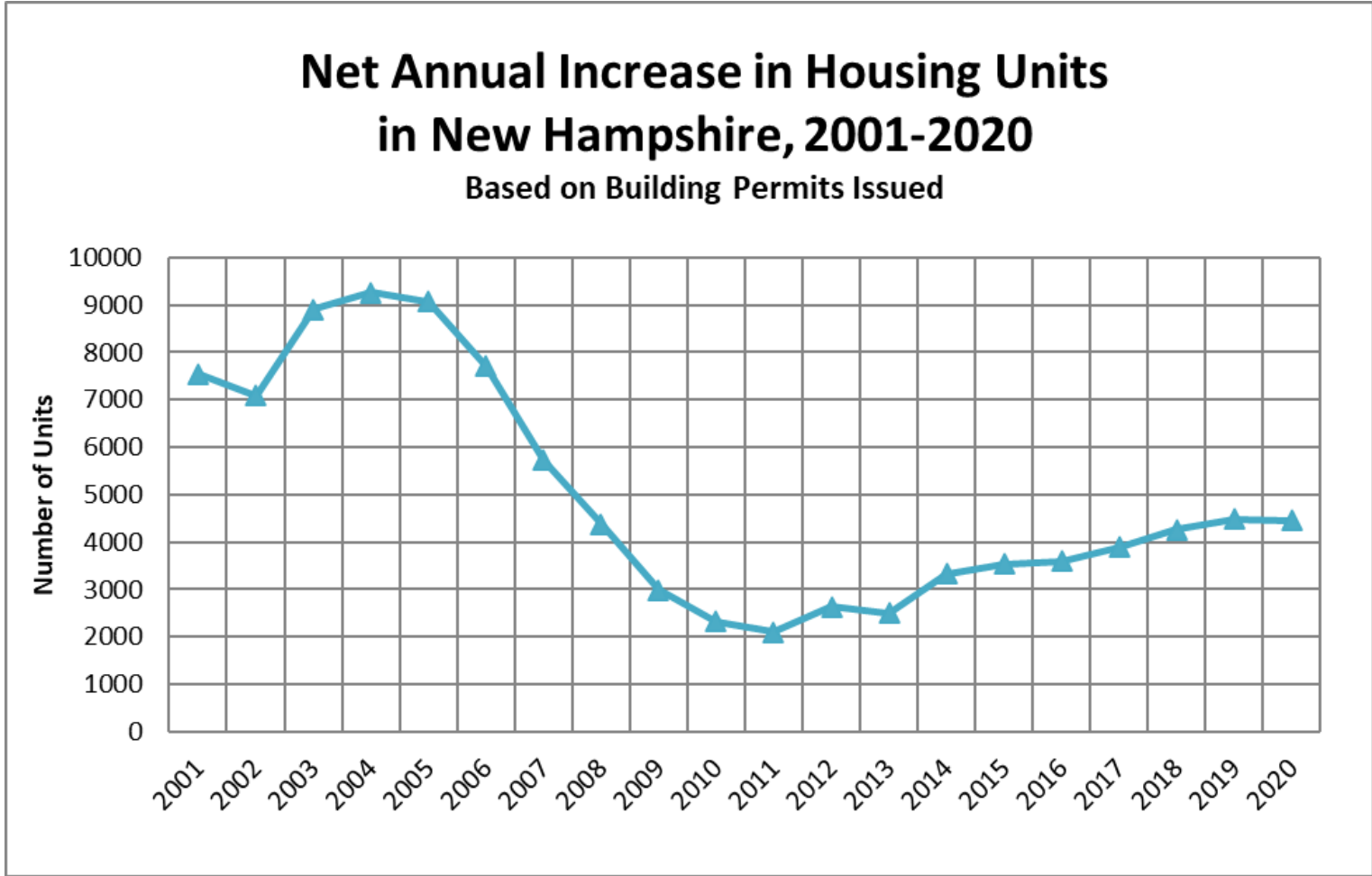


Average Household Size is Declining





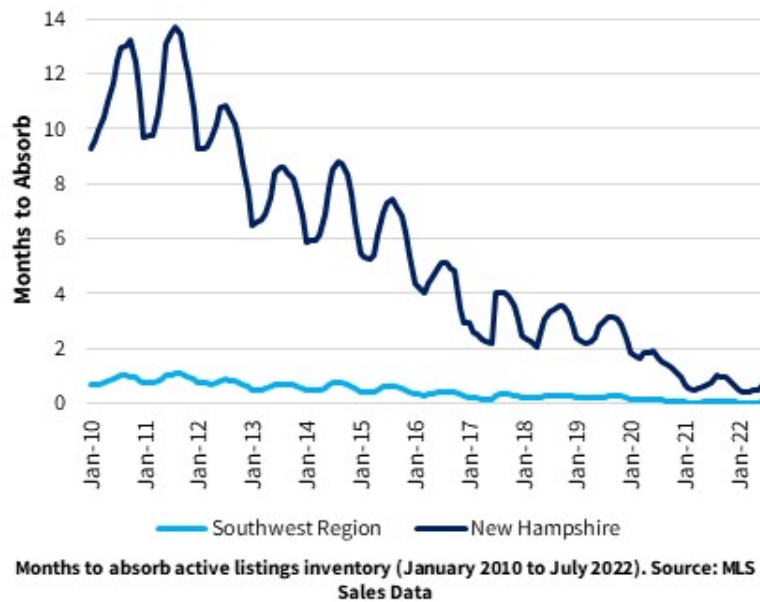
Housing production has slowed





Units available for sale & rent are declining

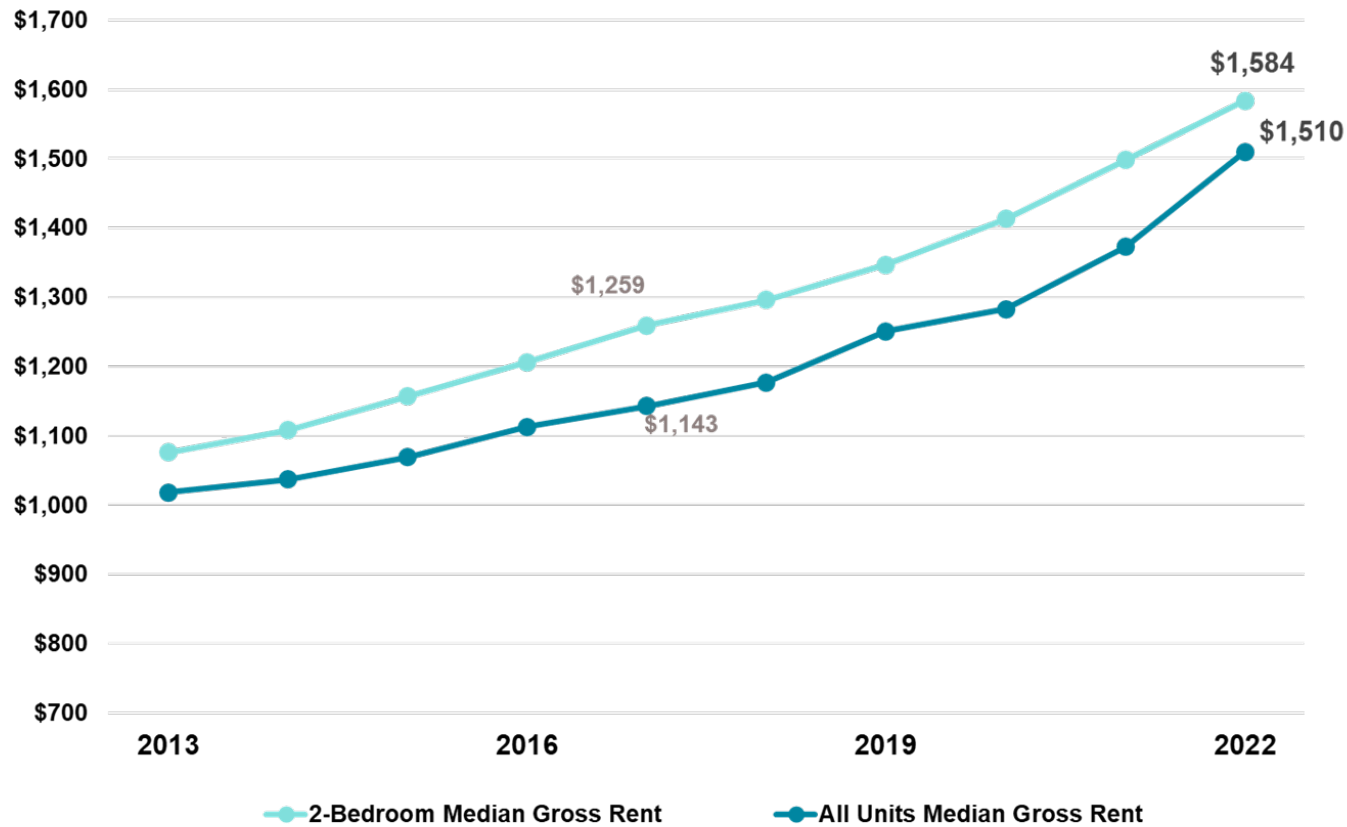
The Southwest Region has an extremely high absorption rate compared to NH as a whole, indicating a strong seller's market



One key metric used to understand and gauge an area's housing market is by calculating its absorption rate. In other words, how long would it take to sell all of the currently available homes on the market if no new properties were listed. As a general rule, 5 to 6 months of inventory is considered to be a normal or balanced market. If it is more than 6 months, the area is likely experiencing a buyer's market, and if it is less than 5 months it is a seller's market.

The Southwest Region has extremely high absorption rate, both by general standards and by comparison to the state as a whole. Homes are not staying on the market for long, sellers may be encouraged to raise their prices, and bidding wars are more likely to occur.

Housing Market Trends - Renter



2-BEDROOM

1-year change ▲ 6%

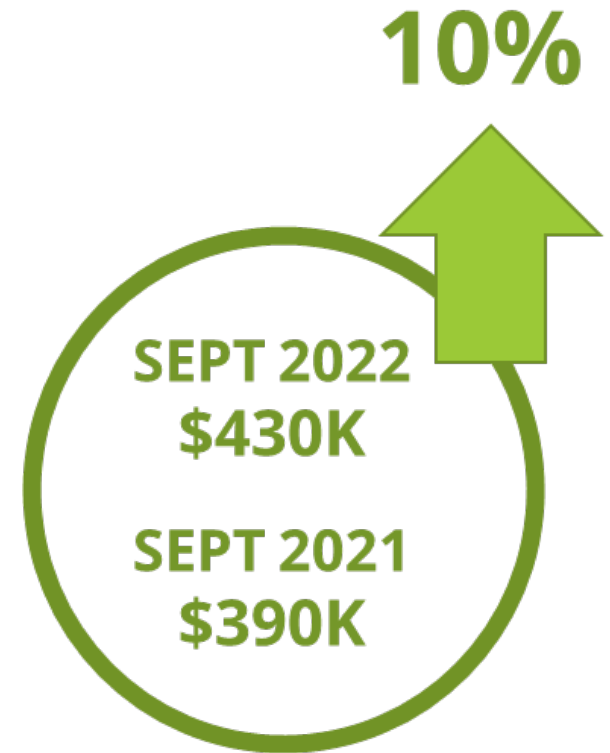
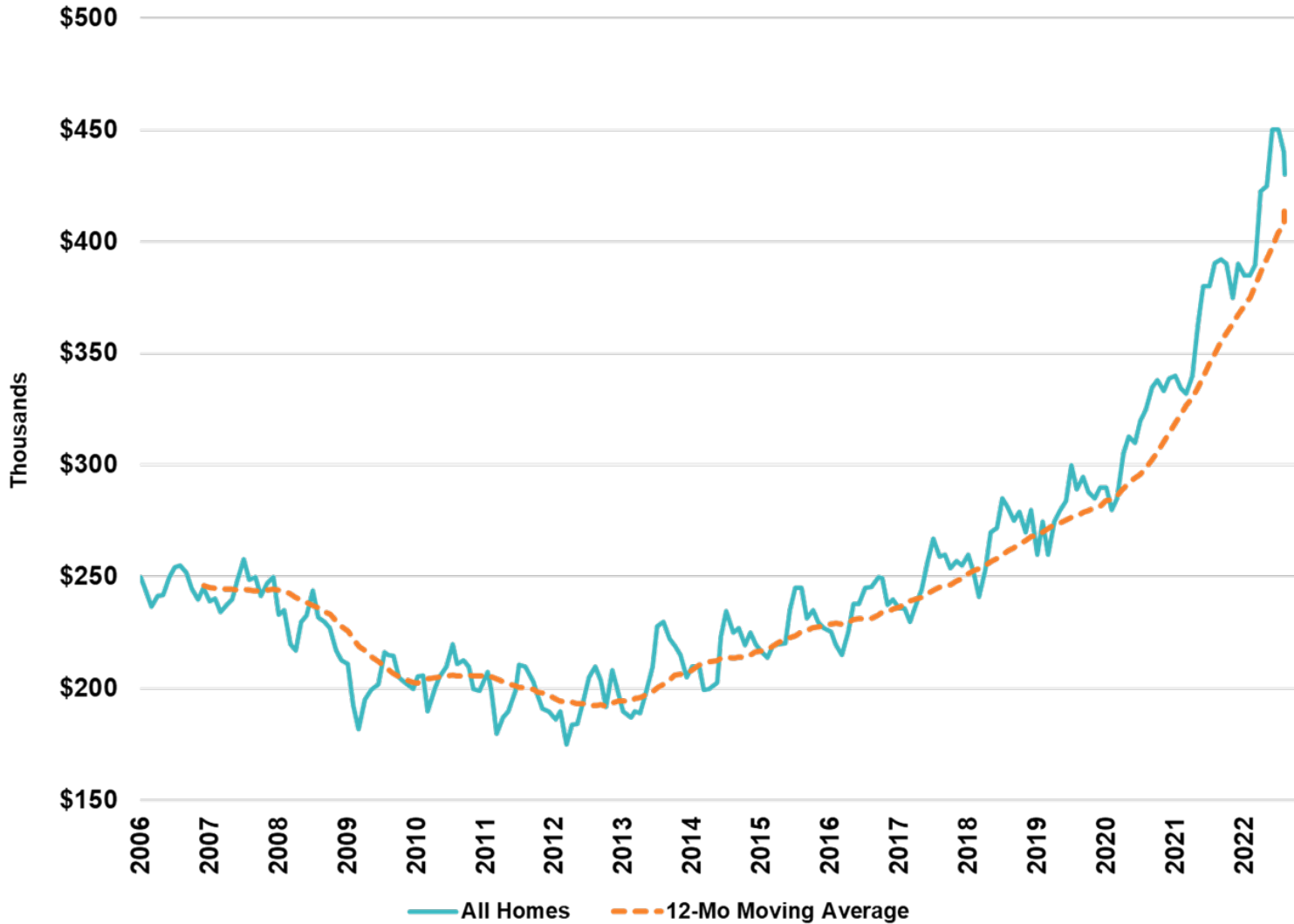
5-year change ▲ 26%

ALL UNITS

1-year change ▲ 10%

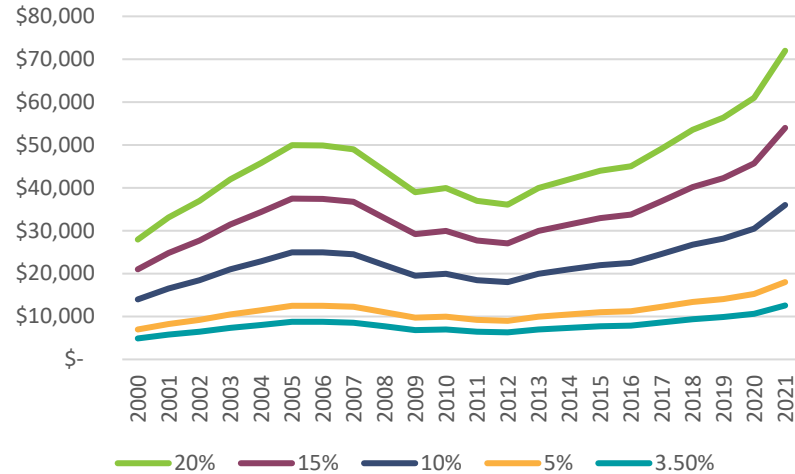
5-year change ▲ 32%

Purchase Price Trends

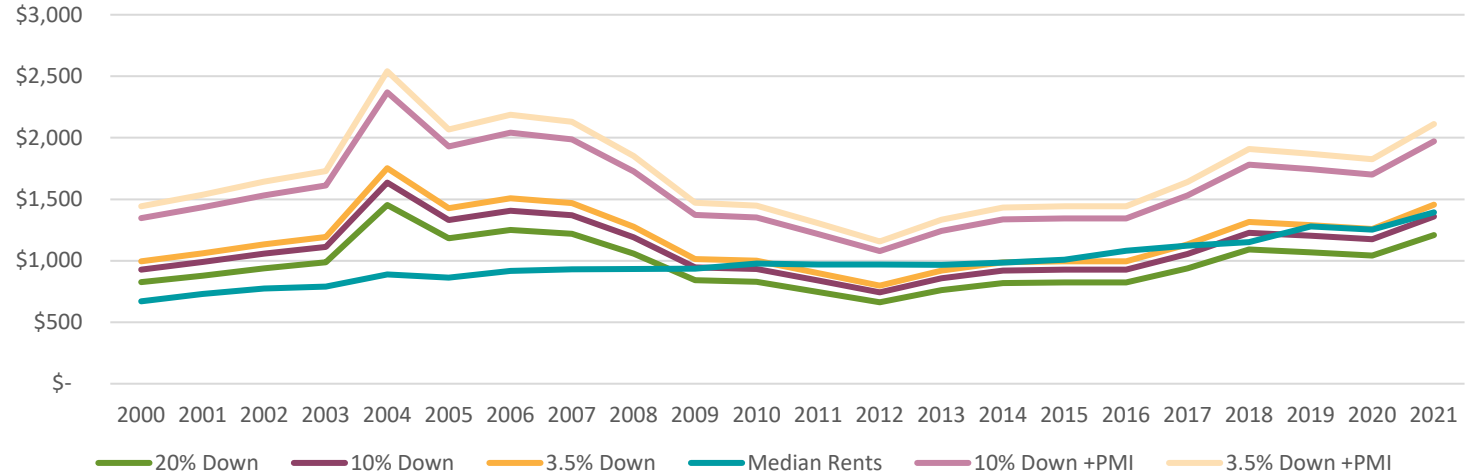


Purchase Price Trends (Strafford County)

Down Payment Amounts



Monthly Mortgage Payments vs Rent



Description	Dec-21	Oct-22
Home Price	\$400,000	\$400,000
Down Payment	5%	5%
Mortgage Interest Rate	3.10%	7.08%
Monthly Payment	\$1,623	\$2,549
*Monthly payment Does not include taxes, insurance, PMI, HOA, etc.		

\$926 difference
in monthly payment
for the same home.



Cost of housing is increasing

Median Rental Price by Number of Bedrooms						
Year of Rent	0	1	2	3	4+	All
2010	\$742	\$910	\$1,205	\$1,463	\$1,977	\$1,086
2011	\$796	\$913	\$1,202	\$1,521	\$1,758	\$1,065
2012	\$768	\$908	\$1,176	\$1,536	\$1,745	\$1,114
2013	\$814	\$948	\$1,224	\$1,523	\$1,991	\$1,114
2014	\$798	\$947	\$1,237	\$1,526	\$2,001	\$1,162
2015	\$834	\$958	\$1,282	\$1,593	\$2,038	\$1,194
2016	\$855	\$996	\$1,359	\$1,638	\$2,072	\$1,265
2017	\$822	\$1,077	\$1,501	\$1,672	\$2,101	\$1,357
2018	\$825	\$978	\$1,466	\$1,633	\$2,007	\$1,321
2019	\$1,148	\$1,254	\$1,646	\$1,877	\$2,082	\$1,551
2020	\$1,050	\$1,310	\$1,761	\$1,880	\$2,604	\$1,608
2021	\$1,013	\$1,235	\$1,851	\$1,867	\$2,952	\$1,587
2022	\$1,304	\$1,282	\$1,877	\$1,840	\$2,298	\$1,595

RPC	
Year of Sale	Median Sale Price
2010	\$ 265,000
2011	\$ 249,900
2012	\$ 255,000
2013	\$ 263,000
2014	\$ 277,500
2015	\$ 289,900
2016	\$ 312,000
2017	\$ 335,000
2018	\$ 360,000
2019	\$ 370,000
2020	\$ 420,000
2021	\$ 470,000
2022	\$ 527,000

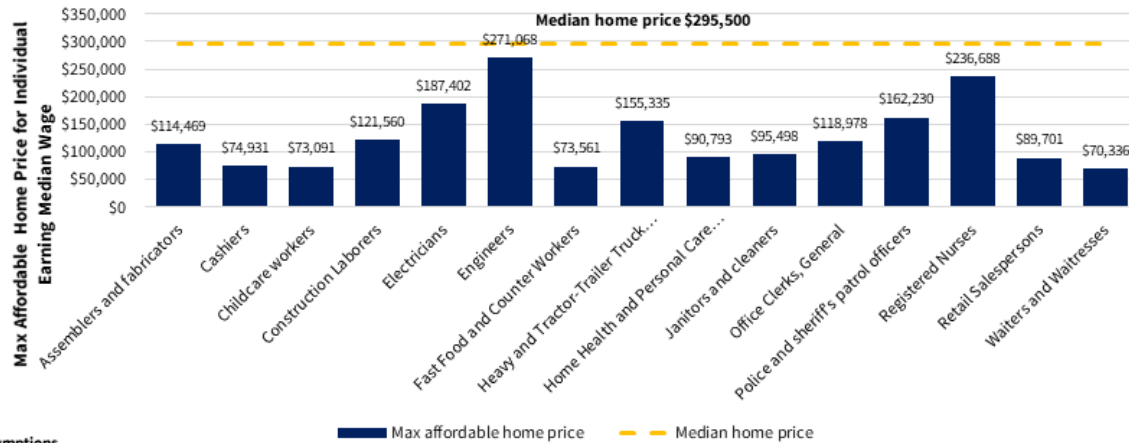


Cost of housing is increasing

Can Afford | Cannot Afford

Housing Affordability by Occupation, Southwest NH

A competitive housing market with limited availability and rising costs poses a significant challenge to meeting the Region’s workforce demands. When looking at the maximum affordable home price for individuals earning a median wage within the 15 chosen occupations, not one occupation would be able to afford a median-priced home.



Assumptions
 Interest Rate: 5.5% (June 2022 average from: <https://www.freddiemac.com/pmns/pmms30>)
 Down payment: 10%
 % of payment that goes to property taxes, utilities, insurance, etc.: 40%
 Inflation Factor: 1.086 (CPI Inflation Calculator (bls.gov))

Affordability by Occupation, Southwest Region. Sources: MLS Data (Median Sold Price, Southwest Region 2022) and Economic and Labor Market Information Bureau (Employment and Wages)

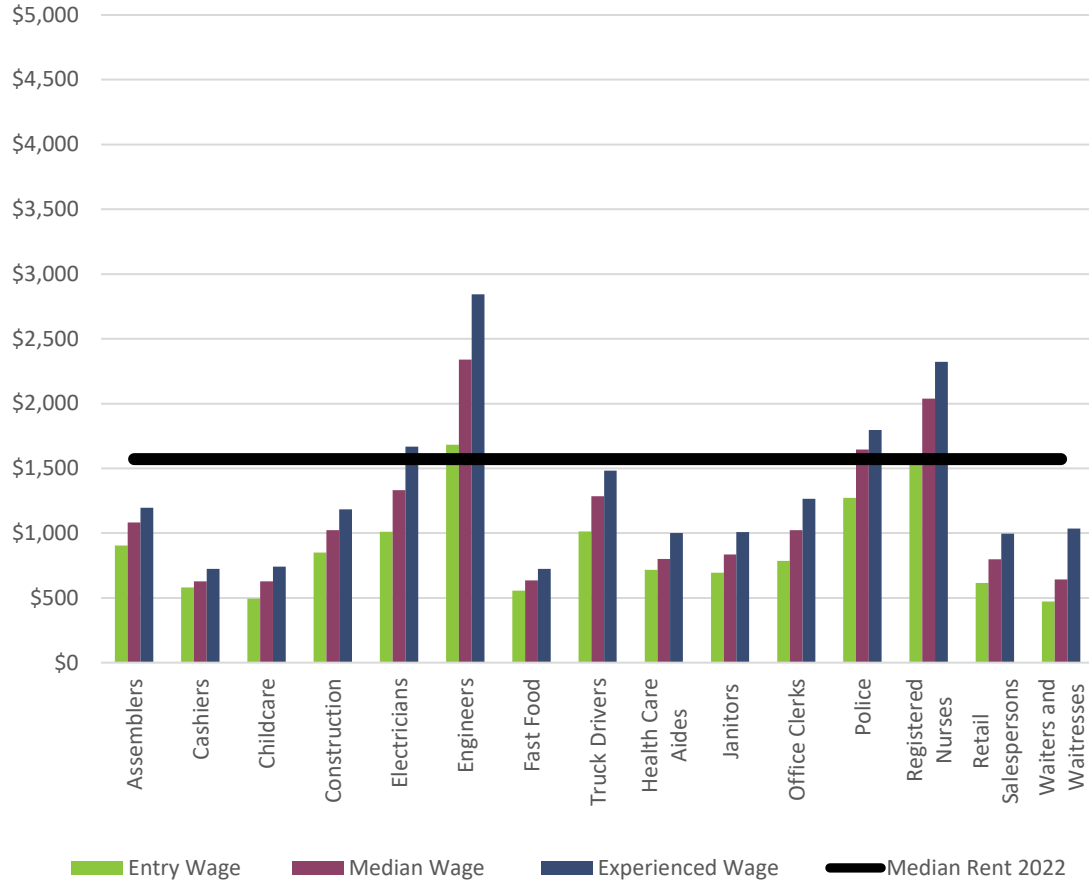
Lakes RPC	Employees	Annual Median Wage	One Worker in the Field	
			Max monthly gross rent	Max affordable home price
Retail Salespersons	1,340	\$31,034	\$776	\$90,184
Fast Food and Counter Workers	1,190	\$25,454	\$636	\$73,969
Cashiers	1,180	\$25,139	\$628	\$73,053
Office Clerks, General	870	\$40,942	\$1,024	\$118,978
Home Health and Personal Care Aides	740	\$31,777	\$794	\$92,346
Waiters and Waitresses	700	\$21,202	\$530	\$61,613
Registered Nurses	660	\$81,316	\$2,033	\$236,306
Janitors and cleaners, except maids and housekeeping cleaners	640	\$32,317	\$808	\$93,914
Assemblers and fabricators	490	\$36,673	\$917	\$106,571
Heavy and Tractor-Trailer Truck Drivers	480	\$52,107	\$1,303	\$151,424
Engineers	450	\$86,392	\$2,160	\$251,057
Construction Laborers	310	\$40,938	\$1,023	\$118,966
Electricians	250	\$52,774	\$1,319	\$153,362
Police and sheriff's patrol officers	250	\$56,002	\$1,400	\$162,742
Childcare workers	130	\$24,304	\$608	\$70,626



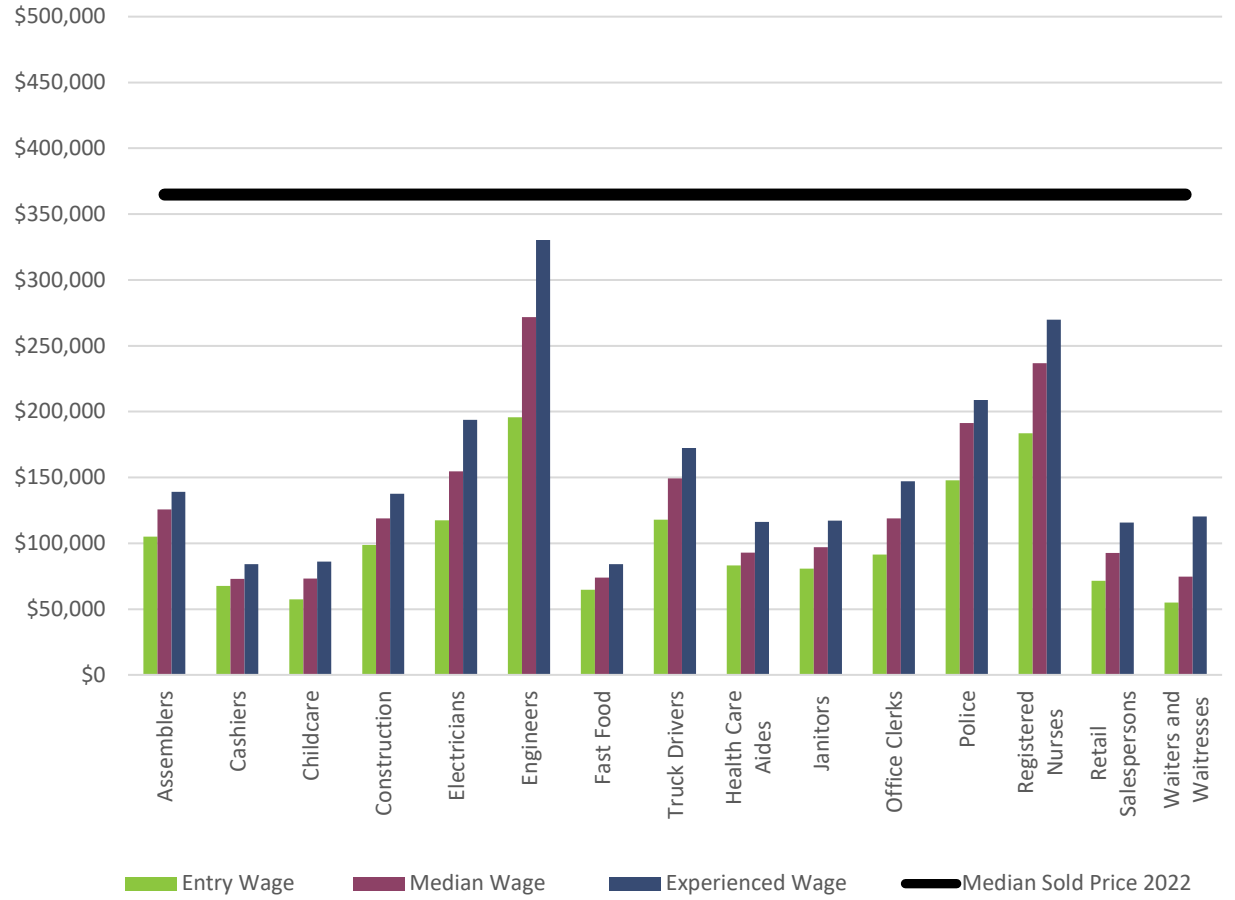
Cost of housing is increasing

AFFORDABILITY BY OCCUPATION – 1 Worker

Max Affordable Rent



Max Affordable Purchase Price



Some Outliers

Components of Population Growth

Components of Population Change (2010-2019)

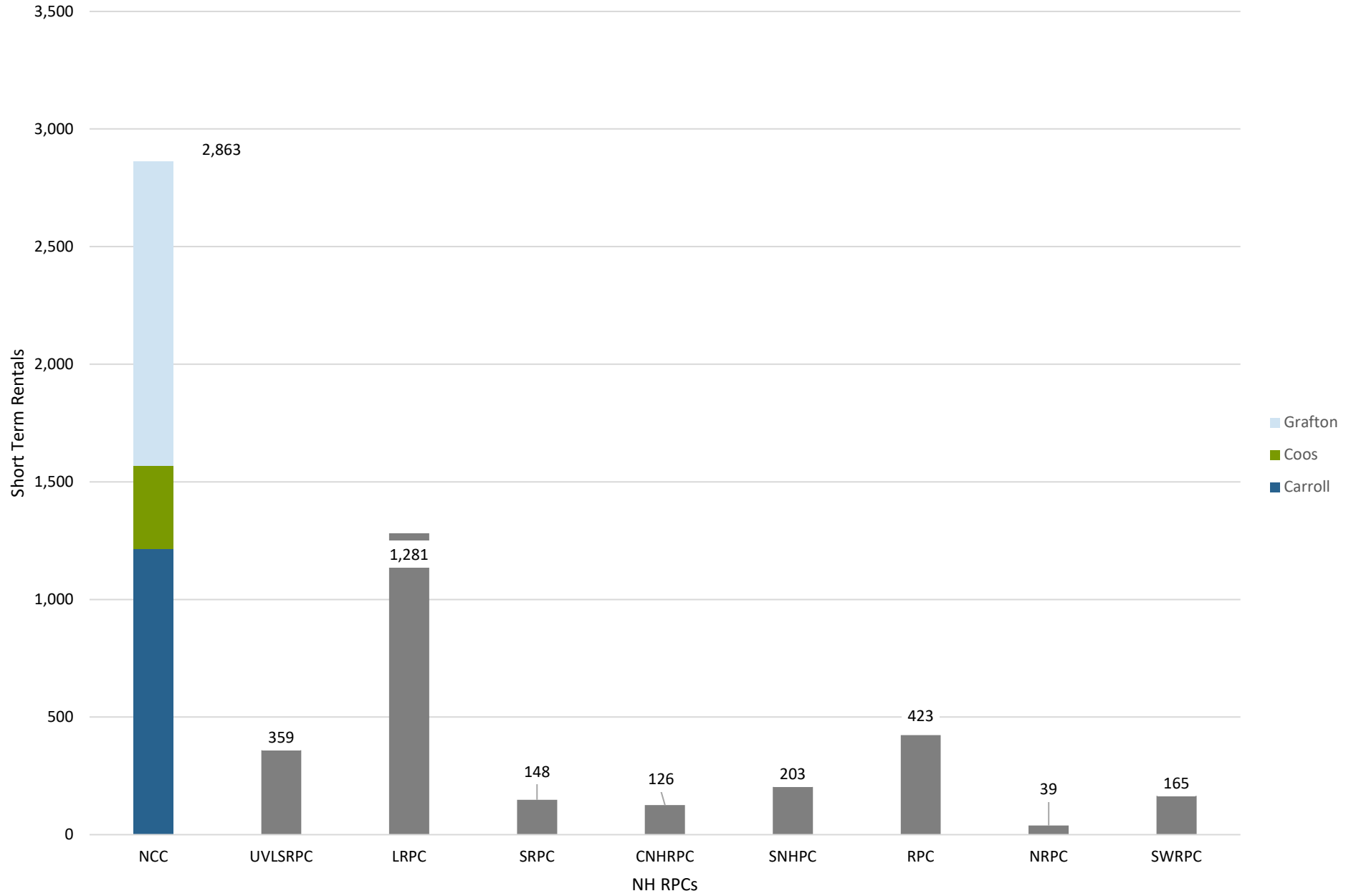


More Births Than Deaths
 SNHPC – 7,000
 NRPC – 5,000
 SRPC – 2,000

More Deaths than Births
 NCC – 3,000
 LRPC – almost 3,000
 RPC – 1,000

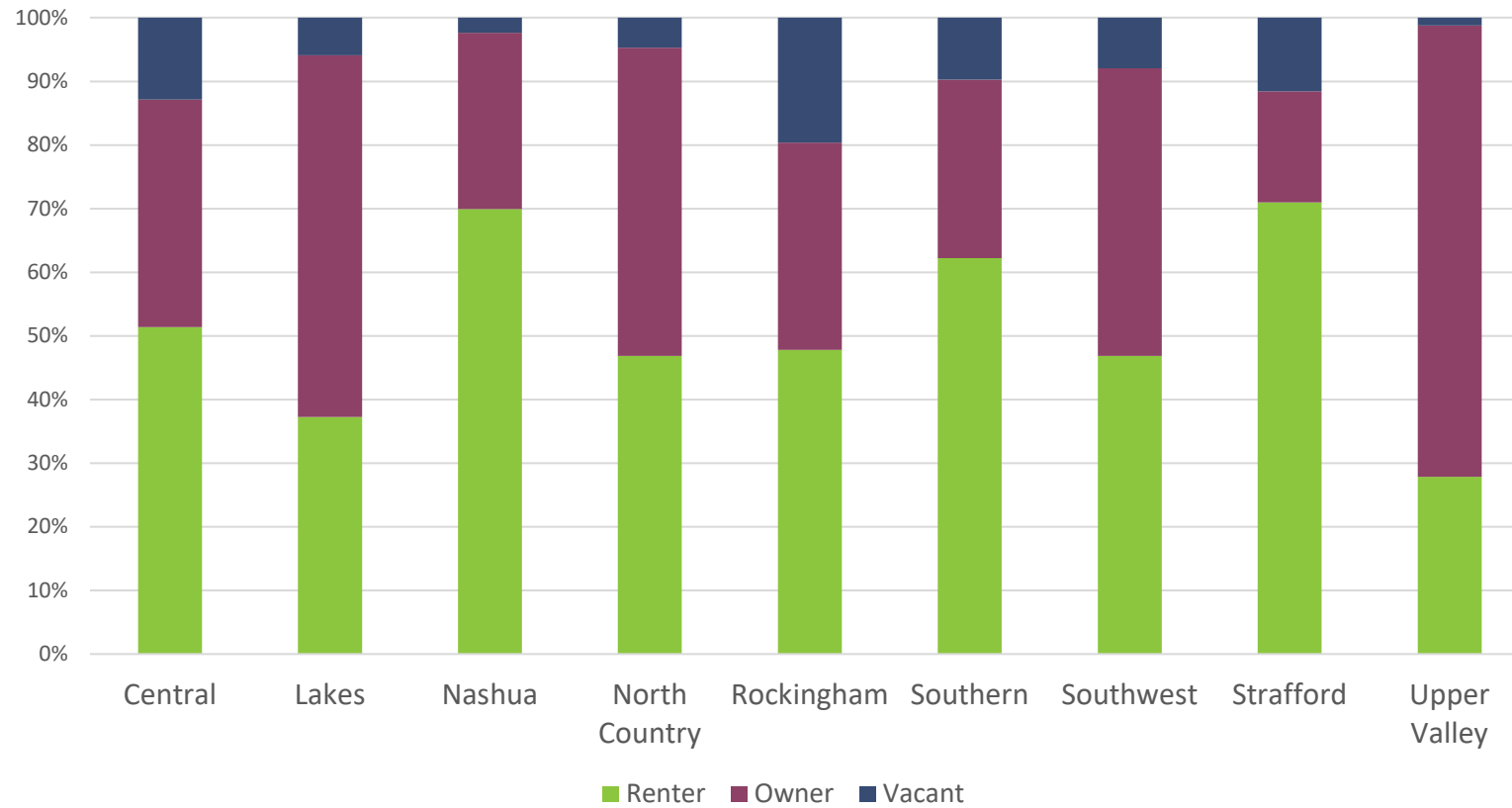
Net Loss
 NCC – 700
 SWRPC – 500

Short Term Rentals by RPC



Housing Condition

Units Lacking Plumbing/Kitchen by Tenure by RPC



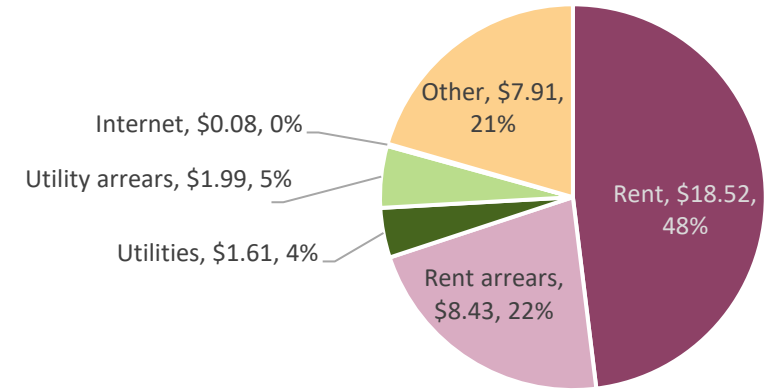
Closer Look at SRPC

Emergency Rental Assistance Program Usage

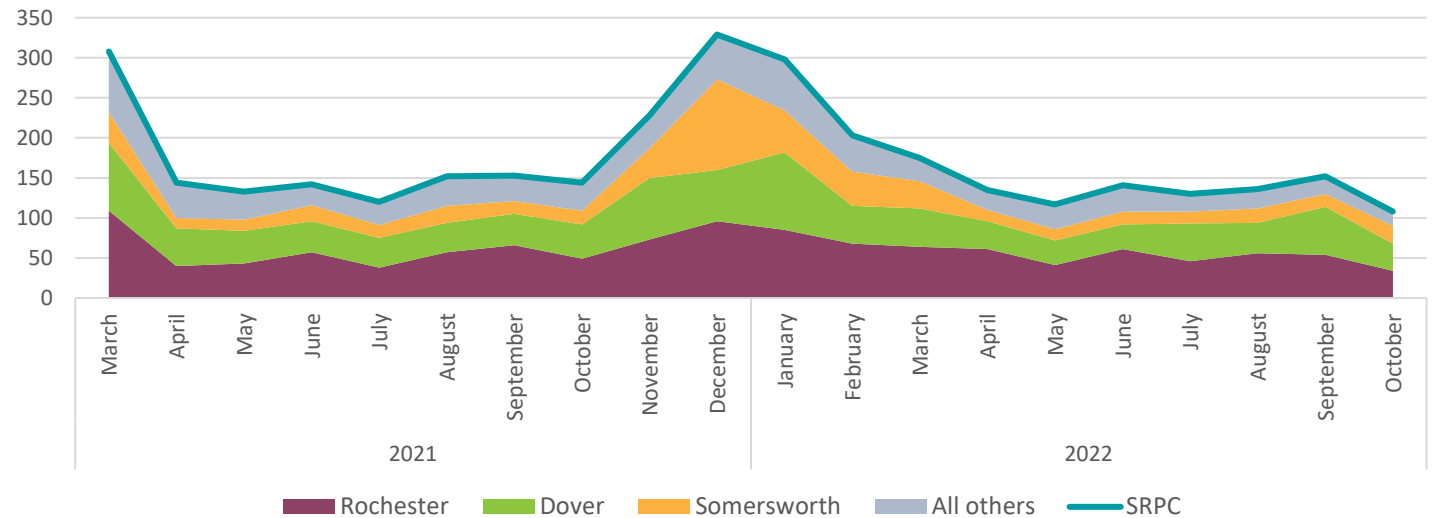
Community	Mar. 2021 - Oct. 2022 Applicants	Successfully enrolled	Median HHI of applicants
Barrington	75	100%	\$59,667
Brookfield	1	100%	Unavailable
Dover	978	100%	\$53,310
Durham	49	100%	\$30,851
Farmington	216	99%	\$37,934
Lee	45	98%	Unavailable
Madbury	8	100%	\$63,958
Middleton	9	100%	\$55,865
Milton	78	99%	Unavailable
New Durham	8	88%	\$51,667
Newmarket	121	95%	\$51,696
Northwood	31	90%	\$53,958
Nottingham	17	94%	\$59,125
Rochester	1,199	100%	\$40,325
Rollinsford	45	100%	\$40,385
Somersworth	550	99%	\$51,023
Strafford	14	100%	\$52,788
Wakefield	22	100%	\$46,000
SRPC	3,465	99%	\$51,345

NHHFA; 2021-2022

NHHFA ERAP Assistance to SRPC Region by Type of Assistance 2021 - 2022 (\$M)



NHHFA Emergency Rental Assistance Applications 2021 - 2022



OVERCROWDING & OVERHOUSING

Renter-occupied households		Household size				
		1	2	3	4	5+
Bedrooms	0 or 1	2,457	1,954	815	594	394
	2	3,308	2,631	1,098	799	530
	3	1,167	928	387	282	187
	4	433	344	144	105	69
	5 or more	137	109	45	33	22

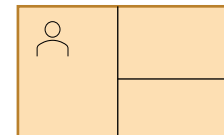
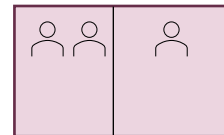
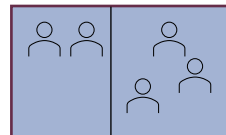
Owner-occupied households		Household size				
		1	2	3	4	5+
Bedrooms	0 or 1	236	520	206	175	88
	2	1,869	4,125	1,637	1,388	697
	3	4,029	8,895	3,529	2,992	1,502
	4	1,450	3,201	1,270	1,077	541
	5 or more	314	694	275	233	117

12%
over-
housed

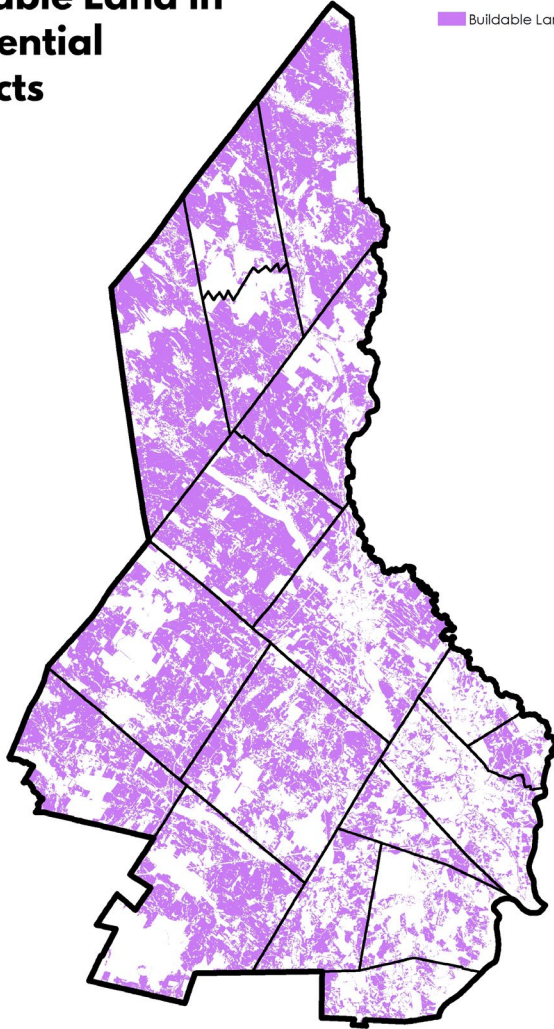
17.5%
Over-
crowded

24%
Over-
housed

10%
over-
crowded



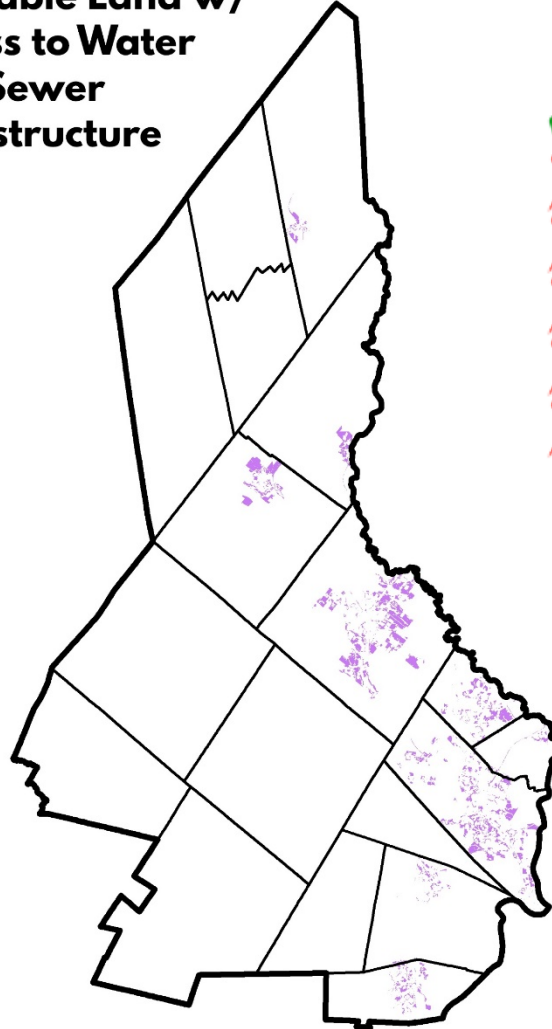
Buildable Land in Residential Districts



Legend

■ Buildable Land in Residential Districts

Buildable Land w/ Access to Water and Sewer Infrastructure



Legend

■ Buildable Land

- ✓ Residentially Zoned Land
- ✗ Physical Infrastructure (Residences, Transportation, etc.)
- ✗ Conservation Land
- ✗ Wetlands
- ✗ Water
- ✗ Steep Slopes

Buildable Land with Access to	Land Acres	% of Land
Water and Sewer Infrastructure	5,924	1.70%
Water Infrastructure Only	16,513	4.75%
Sewer Infrastructure Only	1,864	0.54%
All Buildable Land	170,714	49.07%

Closer Look at SNHPC

Annual New Housing Units

	1980-90	1990-00	2000-10	2010-20	40-Year Average	20-Year Average
Auburn	38	27	19	32	29	26
Bedford	130	225	123	65	136	94
Candia	20	19	11	8	14	10
Chester	26	32	35	25	30	30
Deerfield	40	18	34	18	27	26
Derry	459	87	54	73	168	64
Francestown	24	8	10	-2	10	4
Goffstown	157	78	54	28	79	41
Hooksett	99	82	88	60	82	74
Londonderry	216	98	105	108	132	107
Manchester	849	153	340	215	389	277
New Boston	46	32	51	21	37	36
Weare	105	41	64	17	57	40
Windham	115	58	126	41	85	83
SNHPC	2,322	957	1,113	709	1,275	911
NH	11,726	4,339	6,763	2,427	6,313	4,595

Decennial Census

Sources: IPUMS National Historical Geographic Information System; US Census Bureau.

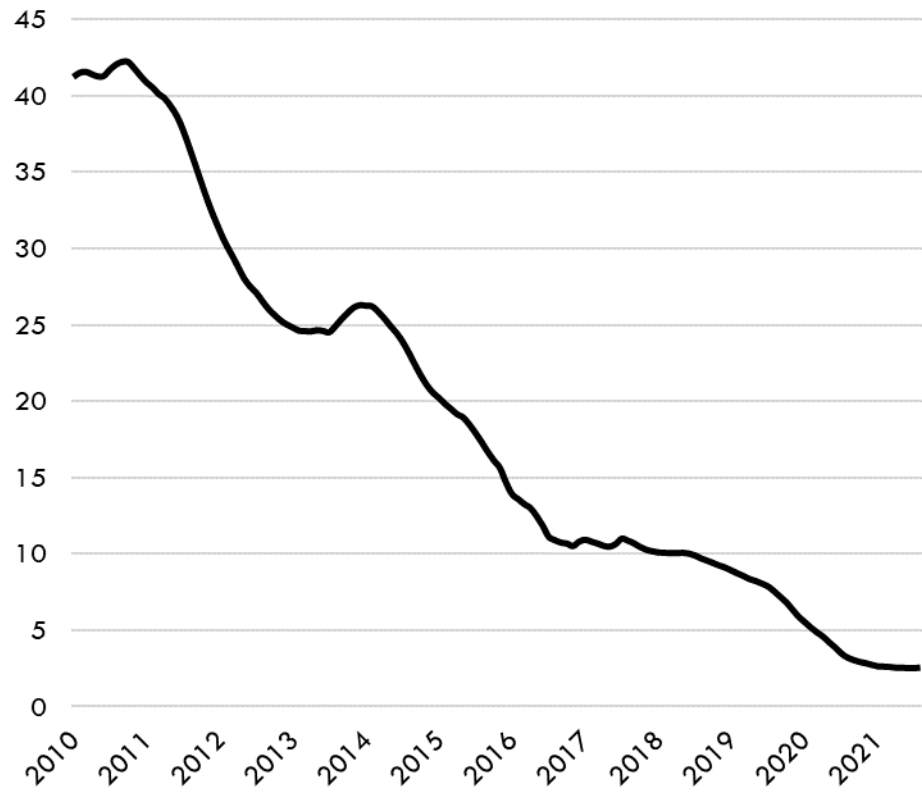
Annual Housing Unit Growth

	1980-90	1990-00	2000-10	2010-20	40-Year Average	20-Year Average
Auburn	4%	2%	1%	2%	2%	1%
Bedford	5%	5%	2%	1%	3%	1%
Candia	2%	2%	1%	1%	1%	1%
Chester	4%	3%	3%	2%	3%	2%
Deerfield	5%	1%	2%	1%	2%	2%
Derry	6%	1%	0%	1%	2%	0%
Francestown	7%	1%	2%	0%	2%	1%
Goffstown	5%	2%	1%	0%	2%	1%
Hooksett	4%	2%	2%	1%	2%	2%
Londonderry	5%	1%	1%	1%	2%	1%
Manchester	2%	0%	1%	0%	1%	1%
New Boston	7%	3%	3%	1%	4%	2%
Weare	8%	2%	2%	0%	3%	1%
Windham	5%	2%	3%	1%	3%	2%
SNHPC	4%	1%	1%	1%	2%	1%
NH	3%	1%	1%	0%	1%	1%

Decennial Census

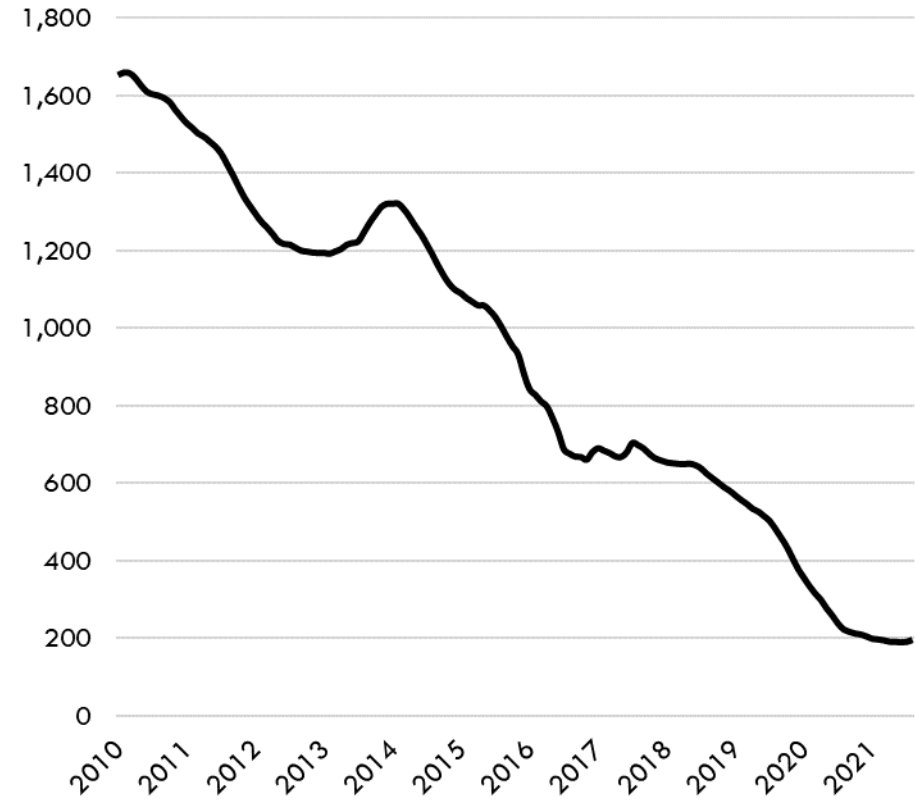
Sources: IPUMS National Historical Geographic Information System; US Census Bureau.

SNHPC Average Number of Days a Home Is on the Market Before It Sells (12-Month Moving Average)



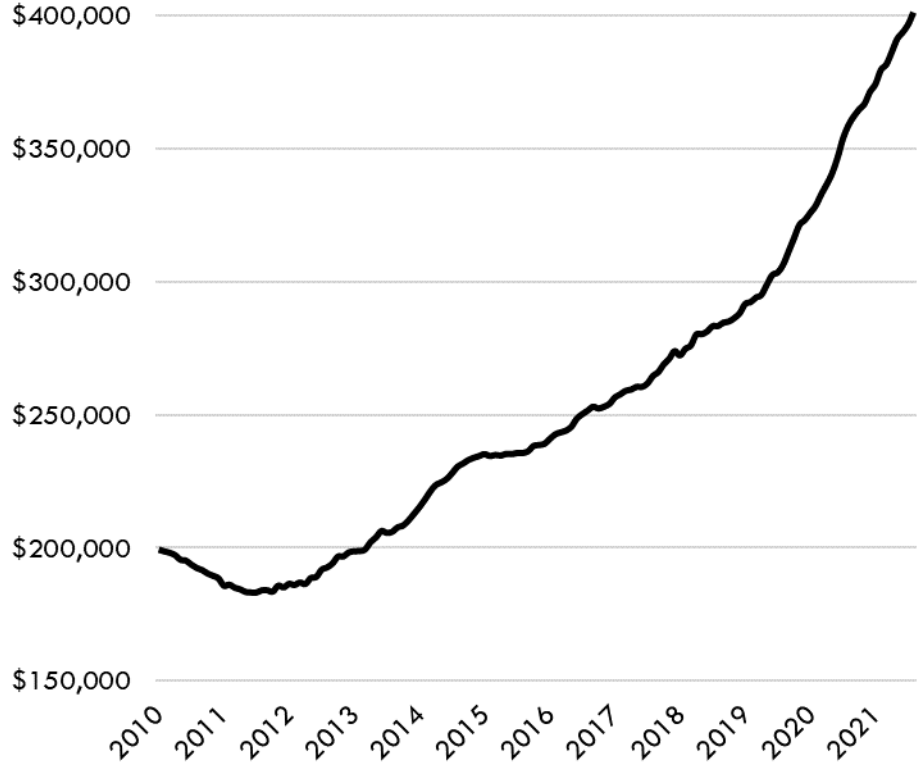
Source: NH Housing Finance Authority

SNHPC Active Property Listings (12-Month Moving Average)



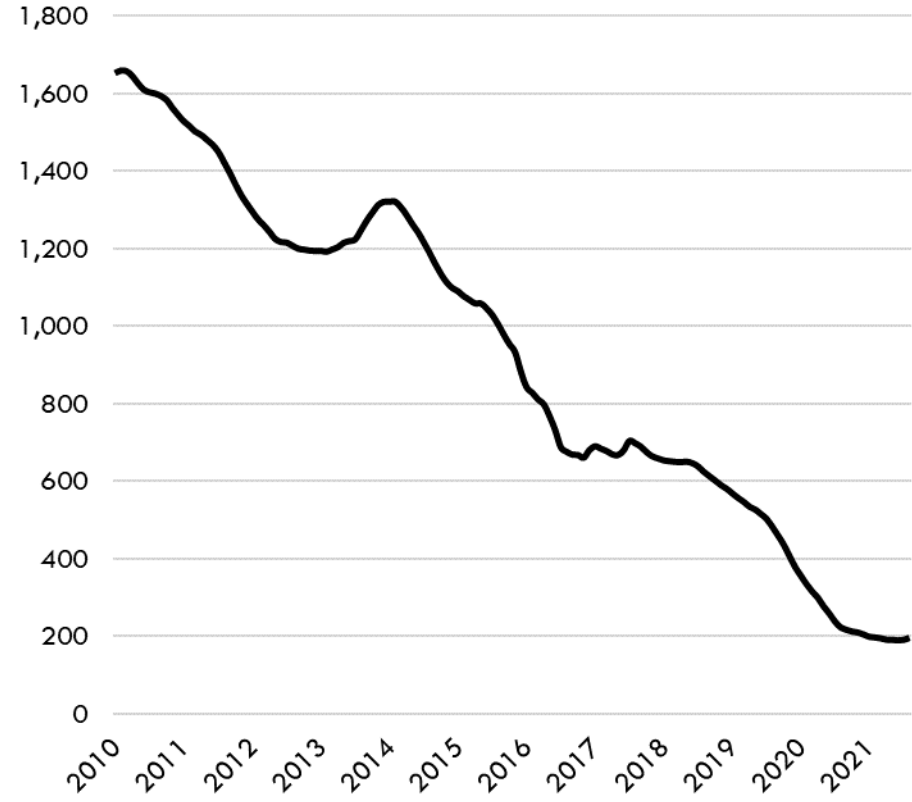
Source: NH Housing Finance Authority

SNHPC Nominal Median Purchase Price (12-Month Moving Average)



Source: NH Housing Finance Authority

SNHPC Active Property Listings (12-Month Moving Average)



Source: NH Housing Finance Authority

Percentage of Housing Type with 3 or More People per Unit

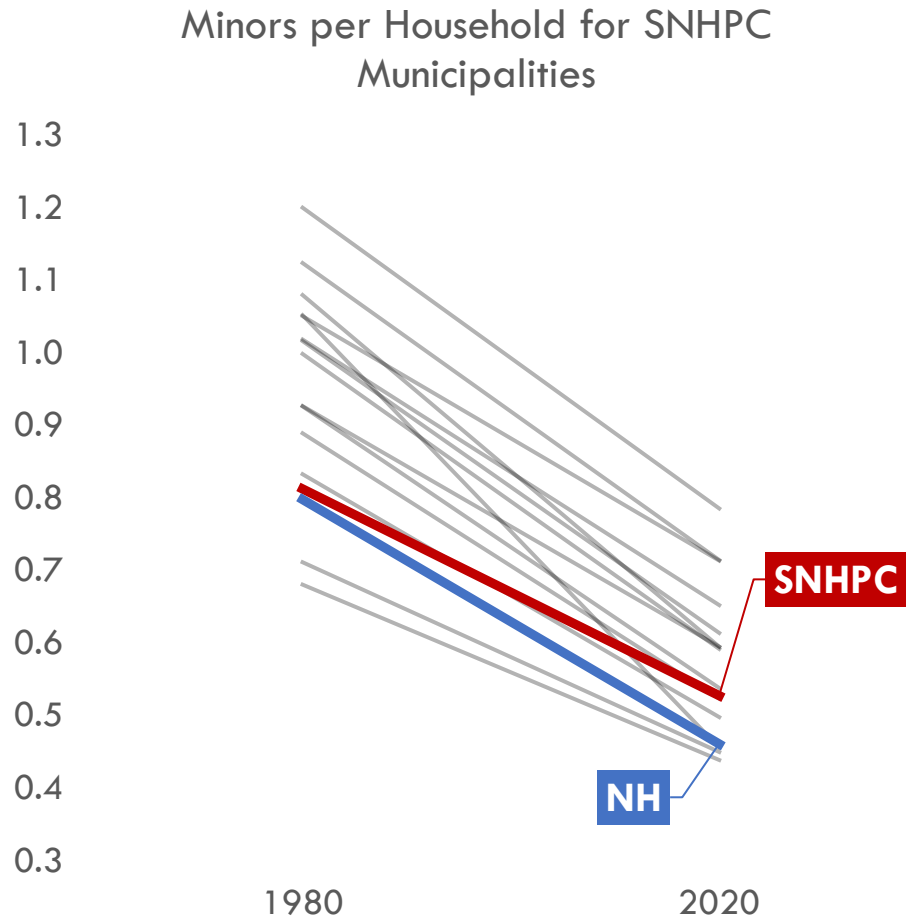
	Single-Family Homes	Duplexes to Quadplexes	Multifamily
SNHPC	47%	35%	22%
Manchester	40%	35%	22%
SNHPC Towns with at Least 10,000 Residents	51%	38%	24%
SNHPC Towns with Less than 10,000 Residents	47%	28%	15%

2020 5-Year American Community Survey
Source: US Census Bureau

Average Household Size by Tenure

	Average Household Size	Owner-Occupied Average Household Size	Renter-Occupied Average Household Size
SNHPC	2.54	2.71	2.21
Manchester	2.33	2.44	2.24
SNHPC Towns with at Least 10,000 Residents	2.69	2.84	2.11
SNHPC Towns with Less than 10,000 Residents	2.77	2.8	2.51

5-Year American Community Survey
Source: US Census Bureau



Minors per Household

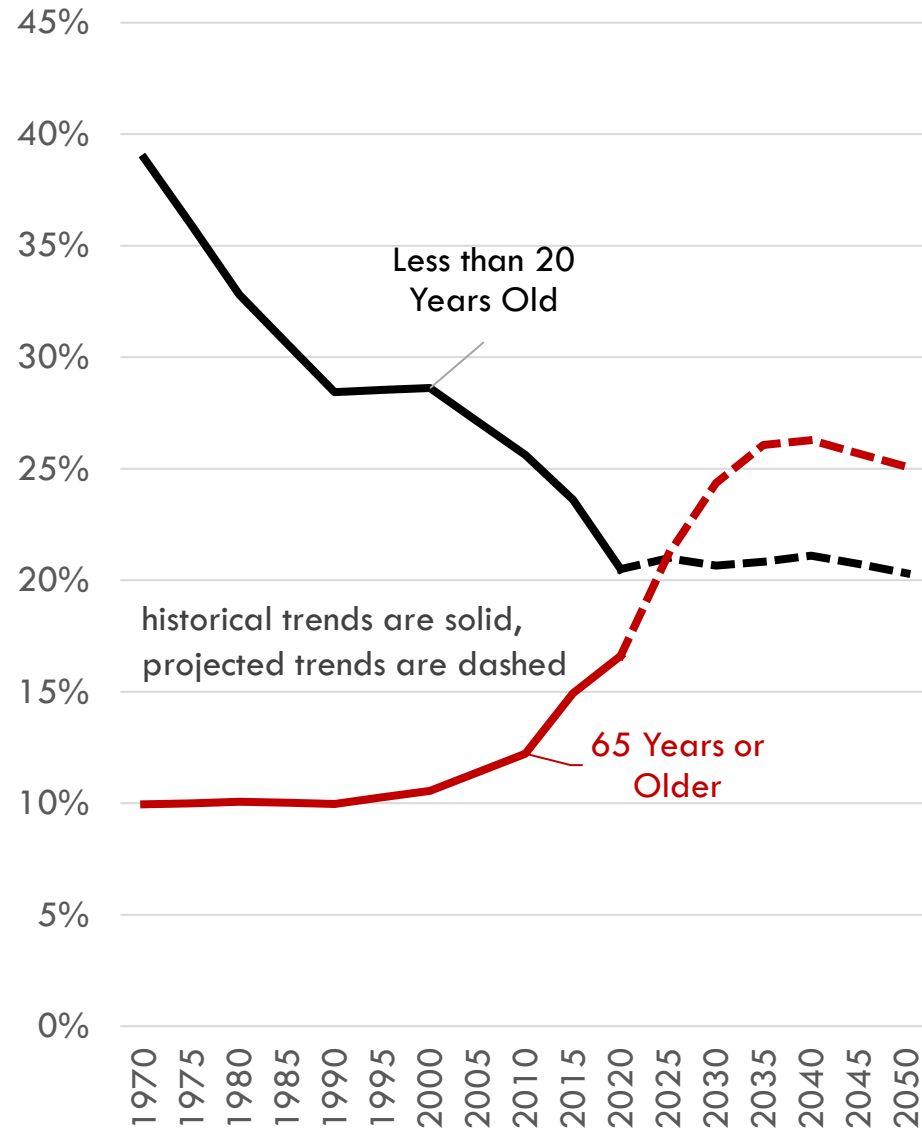
	1980	2020
Auburn	1.02	0.65
Bedford	1.12	0.71
Candia	1.05	0.46
Chester	1.02	0.61
Deerfield	1.00	0.59
Derry	0.89	0.52
Francestown	0.71	0.45
Goffstown	0.93	0.54
Hooksett	0.83	0.50
Londonderry	1.08	0.59
Manchester	0.68	0.44
New Boston	1.05	0.71
Weare	0.93	0.60
Windham	1.20	0.79
SNHPC	0.81	0.53
NH	0.80	0.46

Decennial Census. Minors living in group quarters included in total.

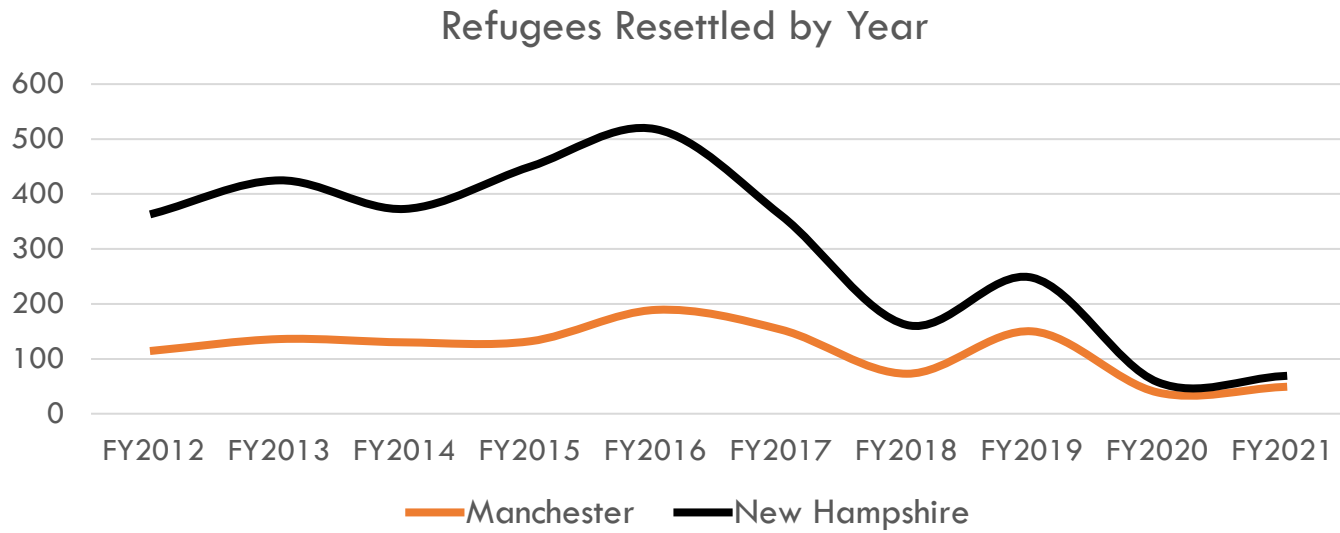
Source: IPUMS National Historical Geographic Information System; US Census Bureau.

In the SNHPC region, the number of persons less than 18 years old per household fell by 35% between 1980 and 2020. Candia fell by 56%.

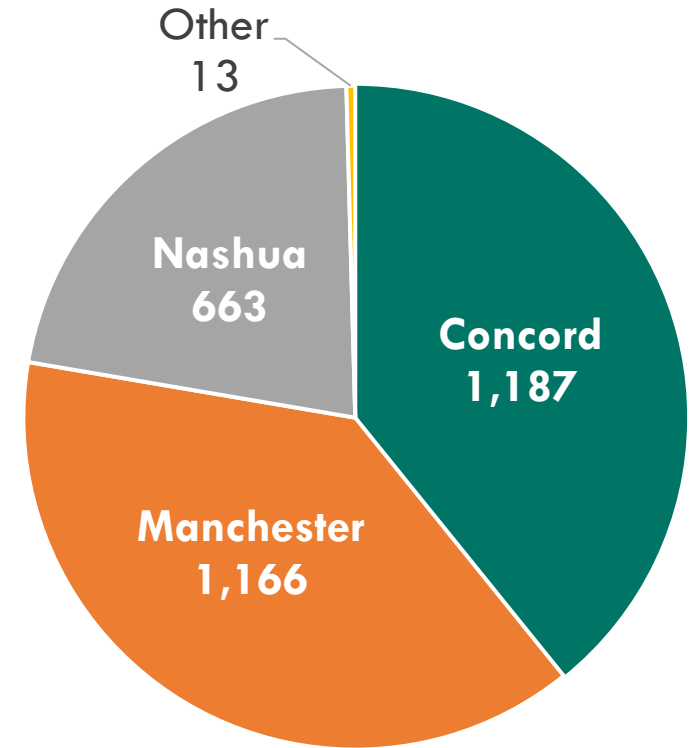
SNHPC Age Groups as a Percentage of the Total Population



Municipal rates reflect county rates which are combined to determine approximate regional rates.
Sources: IPUMS National Historical Geographic Information System; NH Office of Planning & Development; US Census Bureau.



Refugees by City of Resettlement (2012-21)



Source: NH Department of Health & Human Services

NH Housing Finance Authority	Manchester Housing & Redevelopment Authority
---	---

**Housing Choice Voucher Program (Section 8) Waiting
Household Applicants**

11,270	4,270
--------	-------

**Housing Choice Voucher Program (Section 8) Participant
Households Accepted but Still Looking for Available
Units**

470	130
-----	-----

**Housing Choice Voucher Program (Section 8) Participant
Housing Units by Municipality**

4,090	2,090
-------	-------

NH Housing data current as of January 2021. Manchester Housing &
Redevelopment Authority current as of September-October 2022.

Sources: Manchester Housing & Redevelopment Authority; NH Housing Finance
Authority; US Census Bureau.

	Income-Restricted Housing Units by Municipality	Income-Restricted & Section 8 Housing Units As a % of Region's Total Income-Restricted Housing Units	All Housing Units As a % of Region's Total Housing Units
Auburn	0	0%	2%
Bedford	220	4%	7%
Candia	0	0%	1%
Chester	10	0%	2%
Deerfield	20	0%	2%
Derry	440	9%	12%
Francestown	0	0%	1%
Goffstown	220	4%	6%
Hooksett	160	3%	5%
Londonderry	550	11%	9%
Manchester	3,350	67%	45%
New Boston	0	0%	2%
Weare	0	0%	3%
Windham	30	1%	5%

Existing and under construction as of fall 2022.

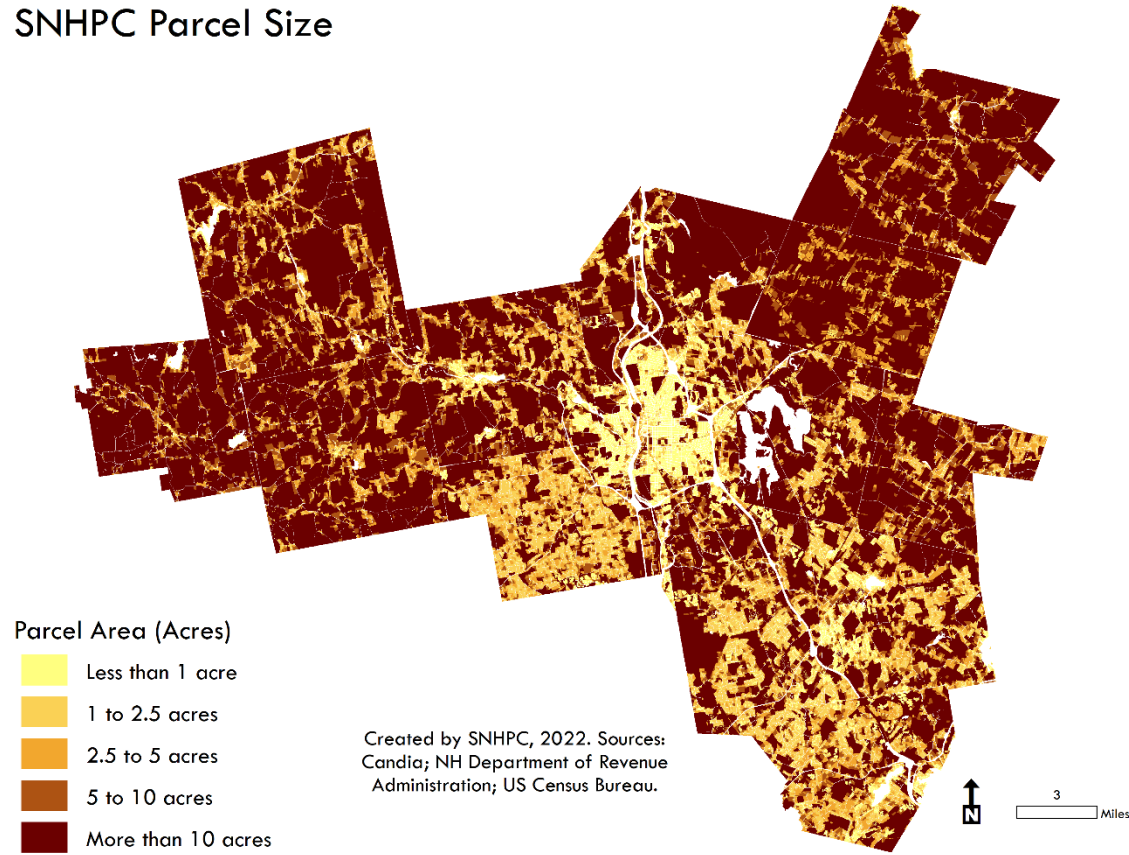
Sources: Individual municipalities; NH Housing Finance Authority; US Census Bureau; US Department of Housing & Urban Development.

	Housing Choice Voucher Program (Section 8) Participant Housing Units by Municipality	Housing Choice Voucher Program Housing As a % of Region's Total Housing Choice Voucher Program Housing	All Housing Units As a % of Region's Total Housing Units
Auburn	5	0%	2%
Bedford	30	1%	7%
Candia	0	0%	1%
Chester	0	0%	2%
Deerfield	20	1%	2%
Derry	230	7%	12%
Francestown	0	0%	1%
Goffstown	60	2%	6%
Hooksett	50	2%	5%
Londonderry	90	3%	9%
Manchester	2,550	84%	45%
New Boston	5	0%	2%
Weare	10	0%	3%
Windham	0	0%	5%

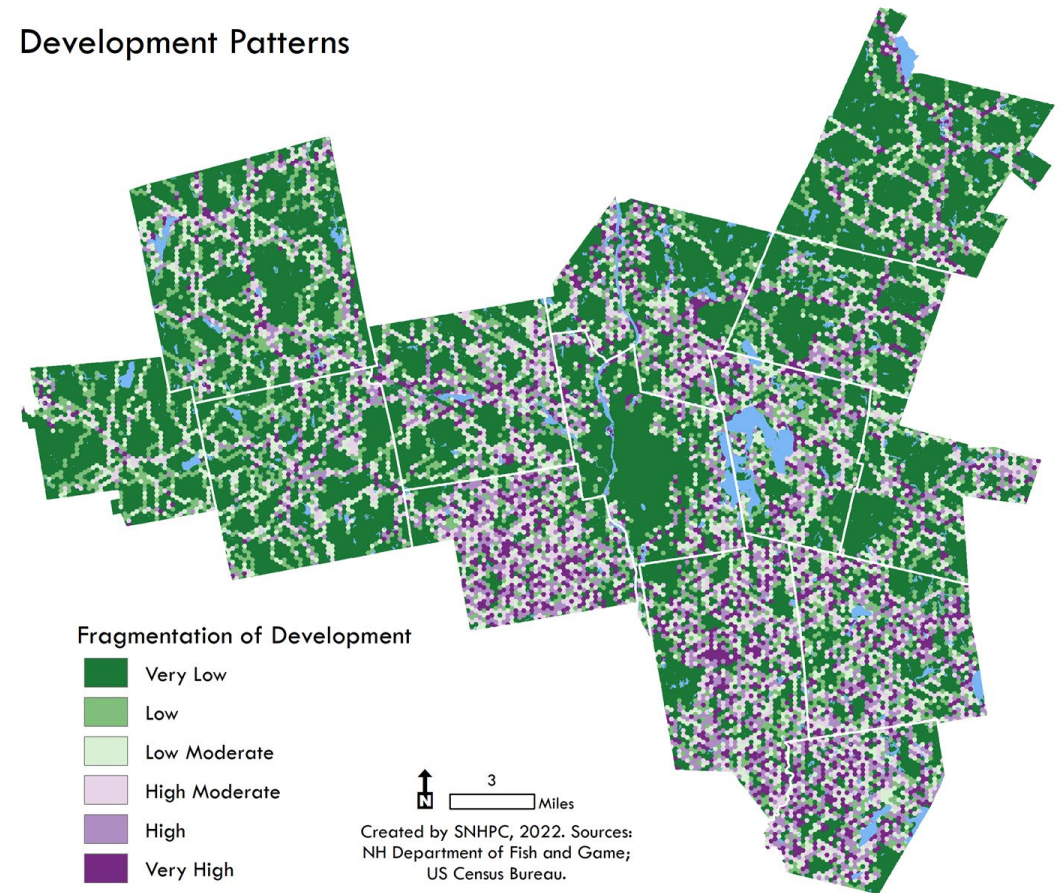
NH Housing data current as of January 2021. Manchester Housing & Redevelopment Authority current as of October 2022. 92 units administered by the Derry Housing & Redevelopment Authority were not included.

Sources: Manchester Housing & Redevelopment Authority; NH Housing Finance Authority; US Census Bureau; US Department of Housing and Urban Development.

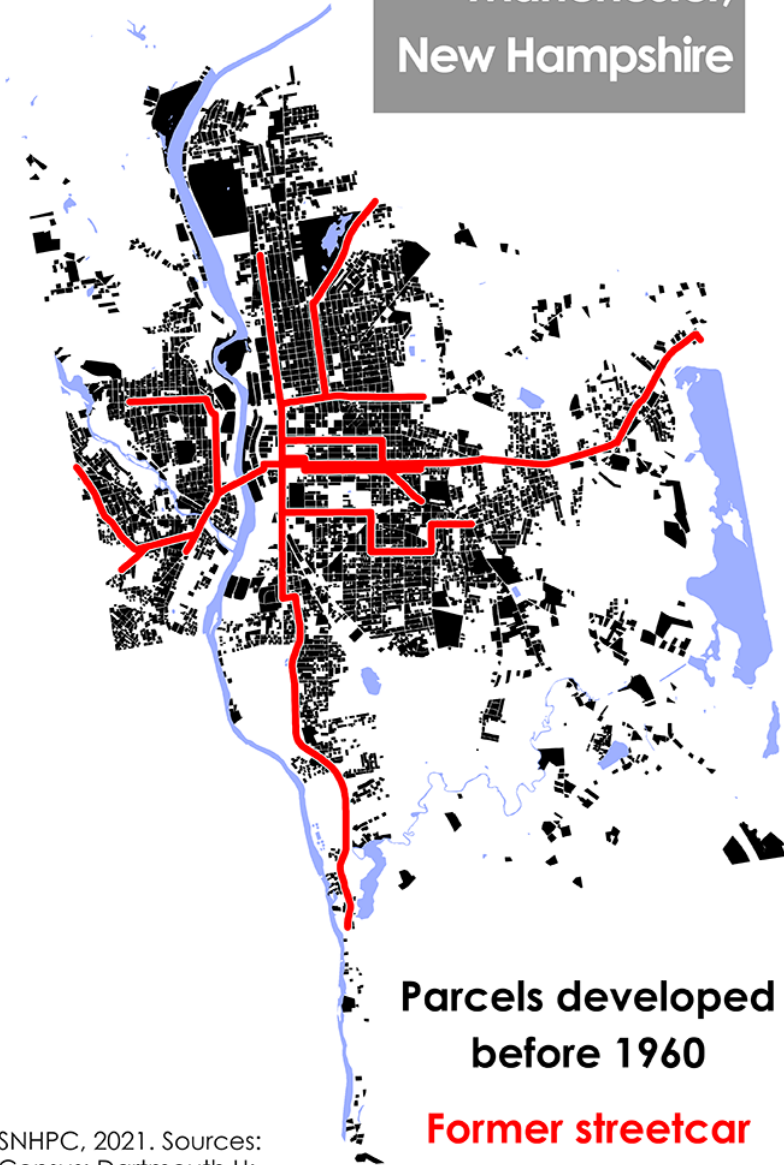
SNHPC Parcel Size



Development Patterns



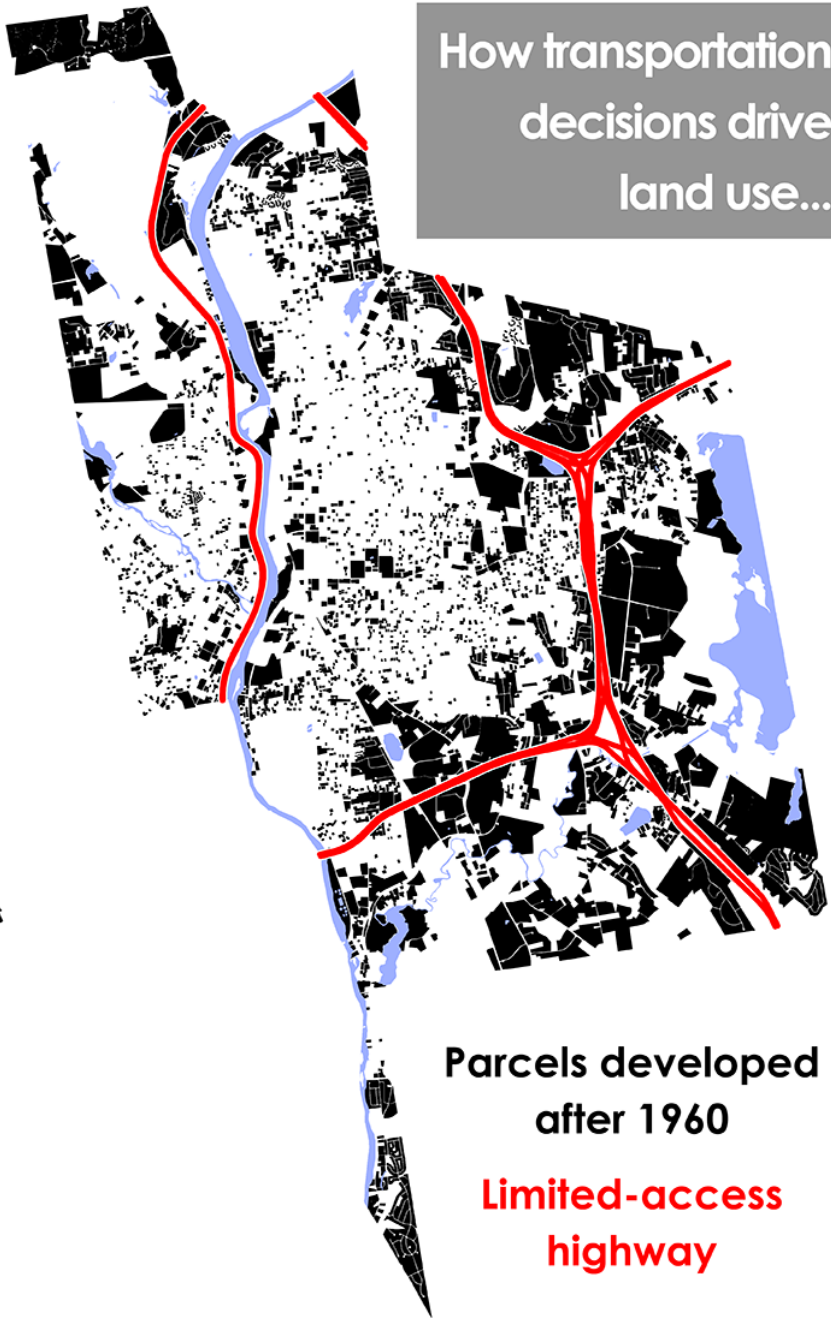
Manchester,
New Hampshire



Parcels developed
before 1960

**Former streetcar
network**

How transportation
decisions drive
land use...



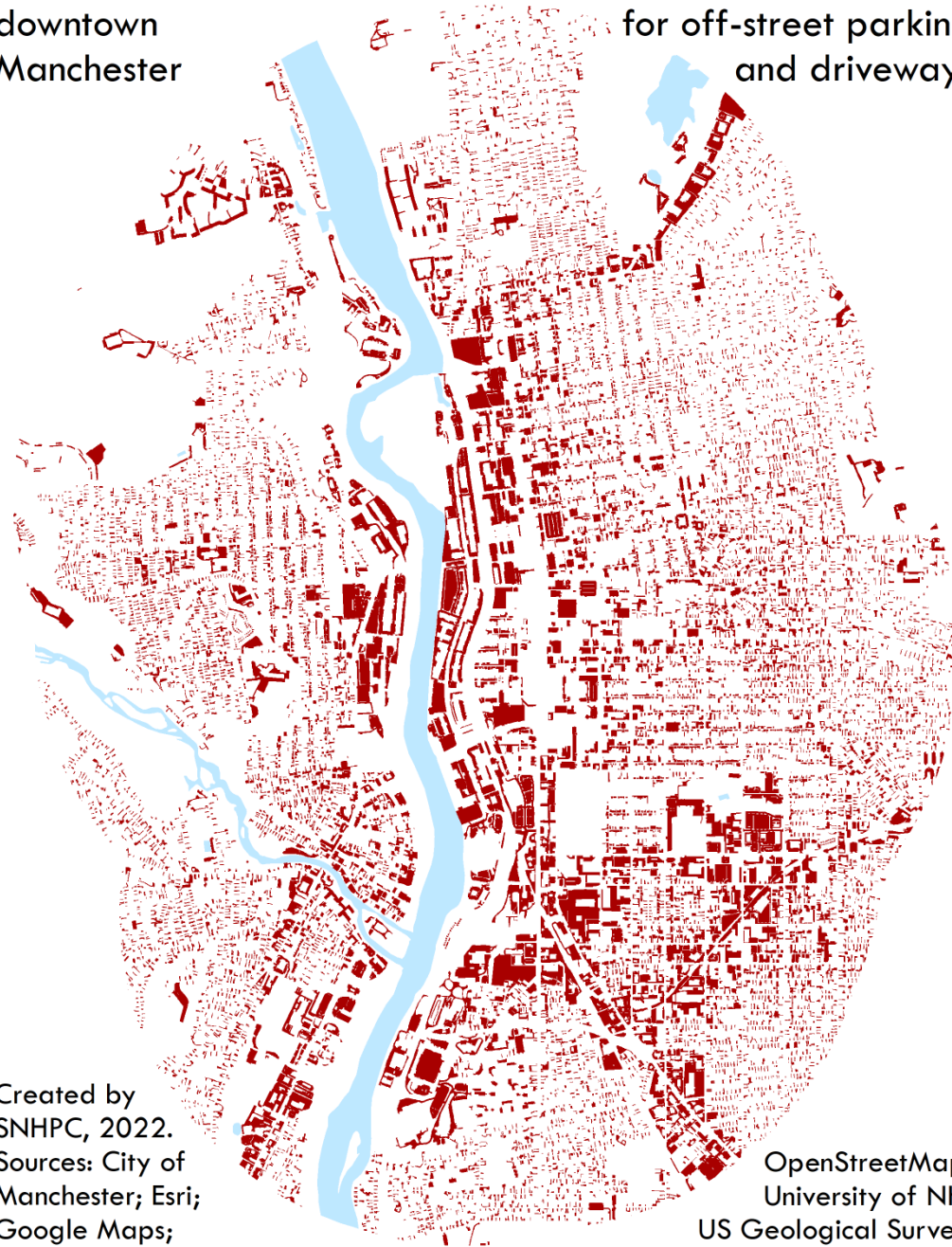
Parcels developed
after 1960

**Limited-access
highway**

SNHPC, 2021. Sources:
Census; Dartmouth U;
Manchester; MHA;
NHDOT; OR Cummings;
USGS; Wikimedia.

Within 1 mile of
downtown
Manchester

820 acres are reserved
for off-street parking
and driveways

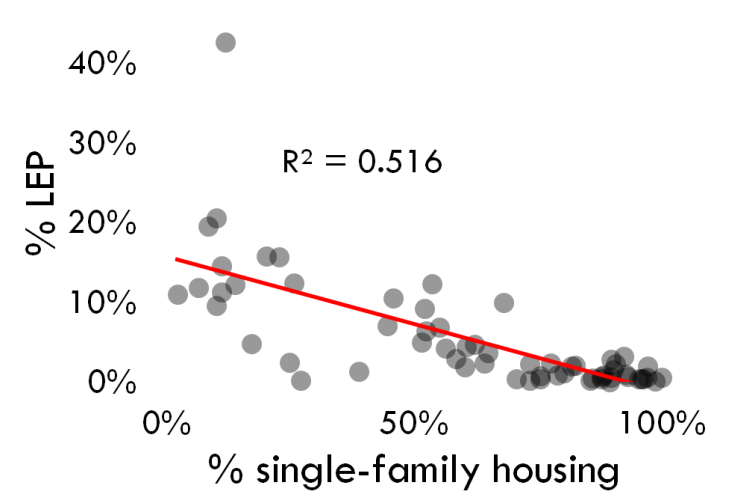
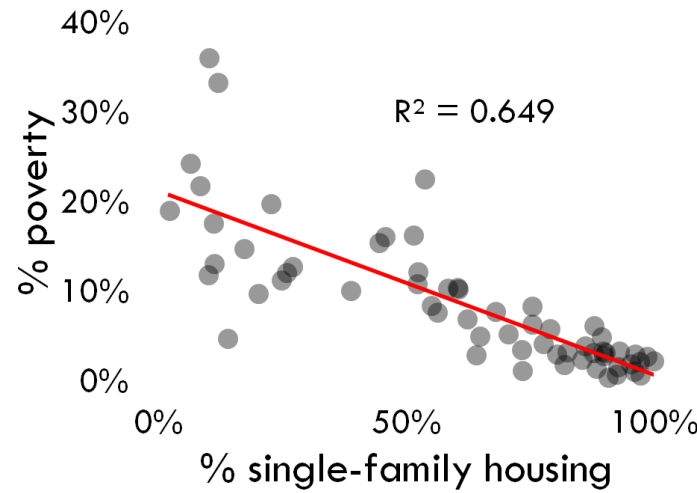
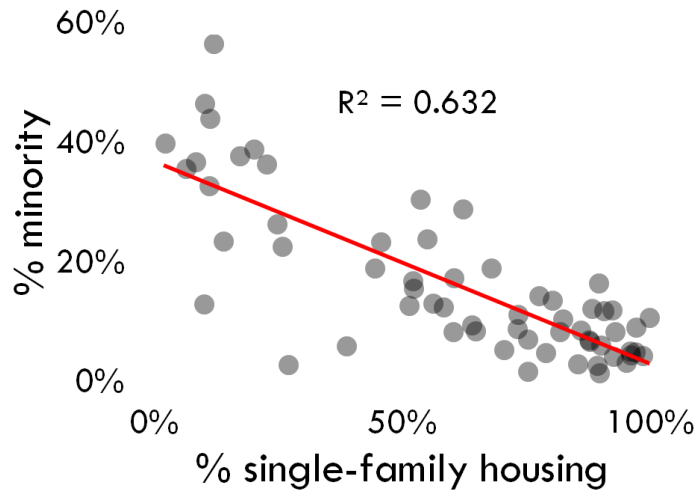
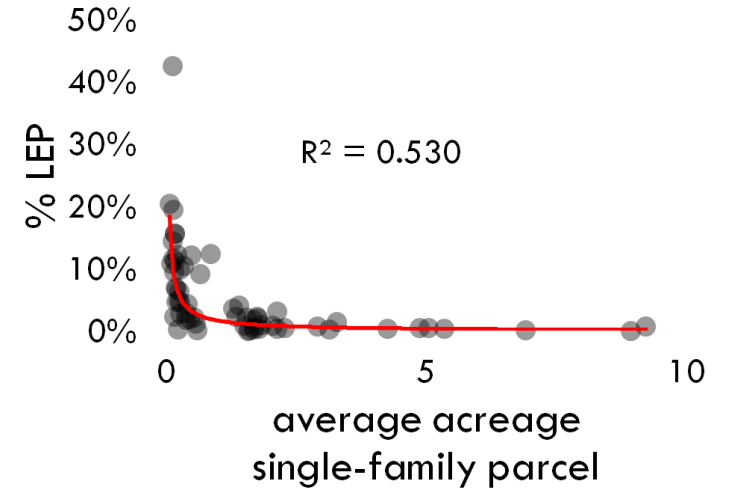
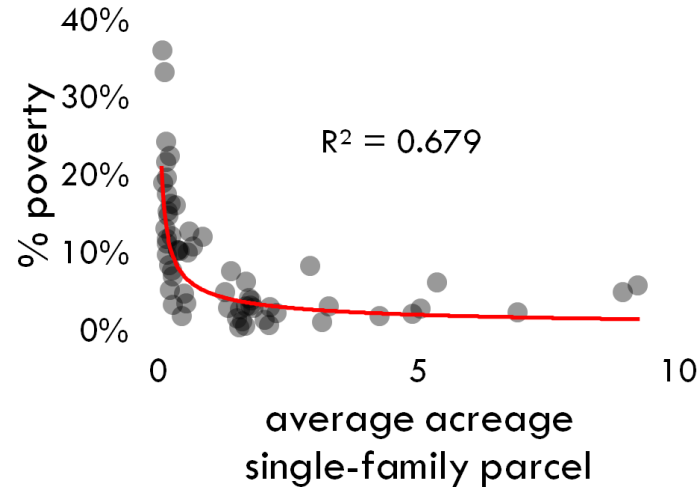
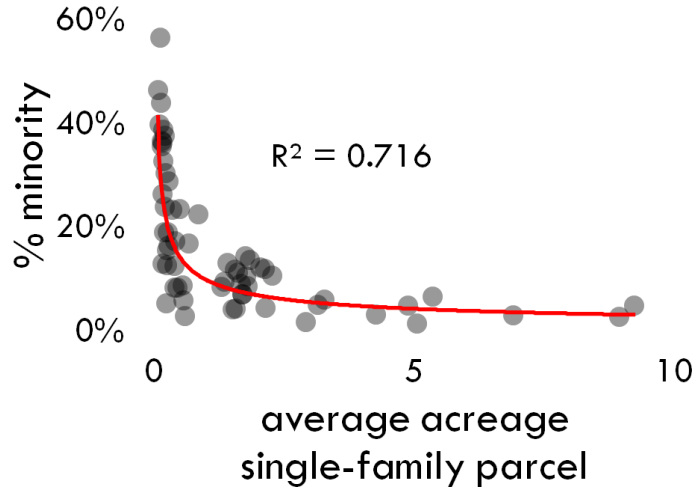


**That's land
valued at
around
\$205 million
and 8% of
the city's
total land
value**

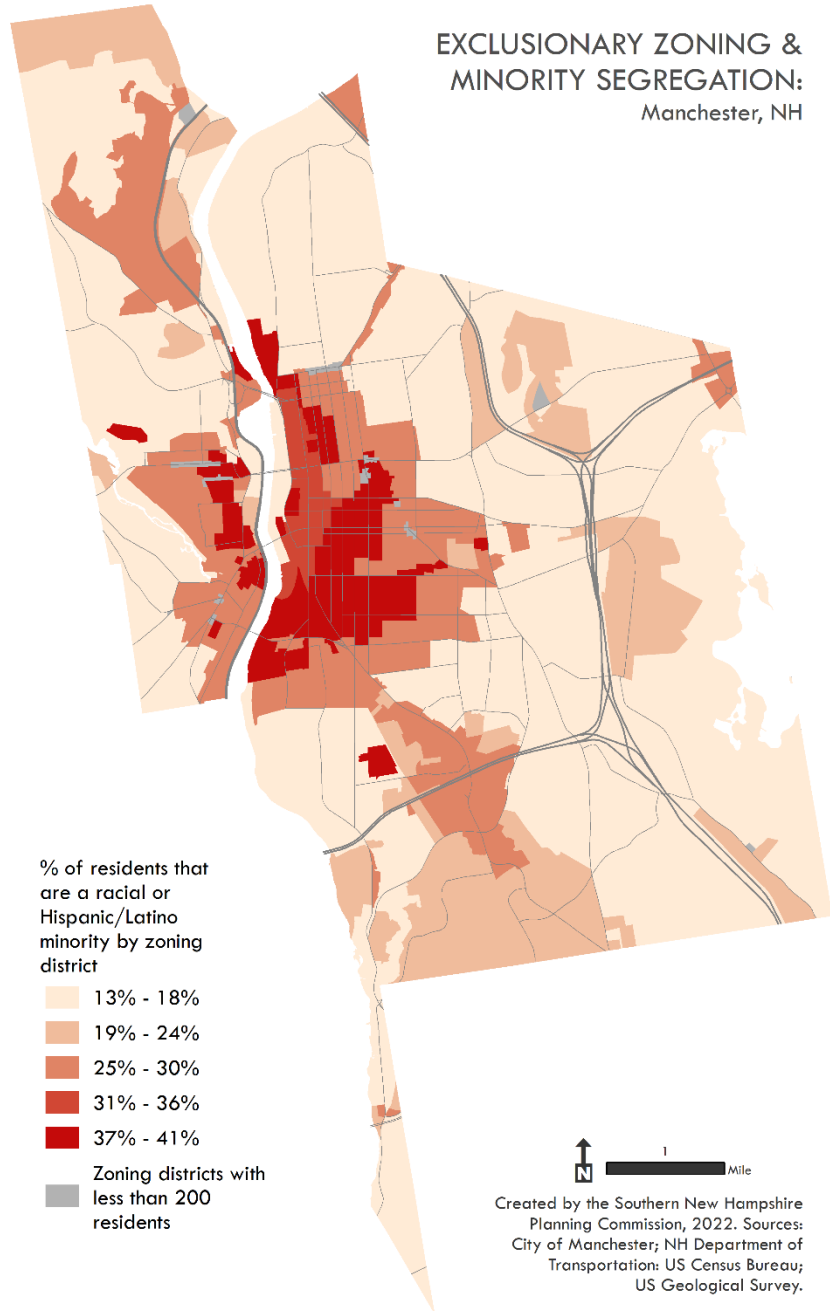
Created by
SNHPC, 2022.
Sources: City of
Manchester; Esri;
Google Maps;

OpenStreetMap;
University of NH;
US Geological Survey.

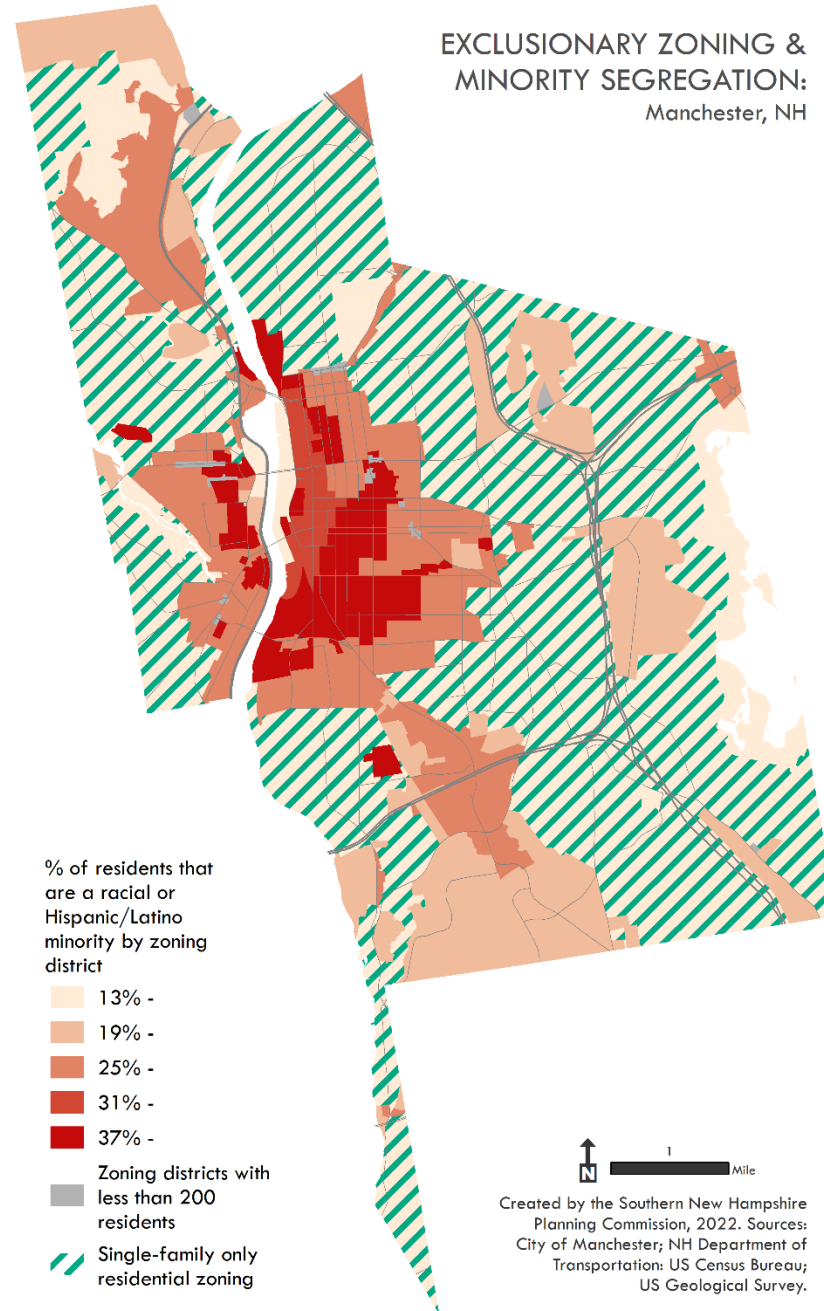
SNPC Census Tracts



EXCLUSIONARY ZONING & MINORITY SEGREGATION:
Manchester, NH



EXCLUSIONARY ZONING & MINORITY SEGREGATION:
Manchester, NH

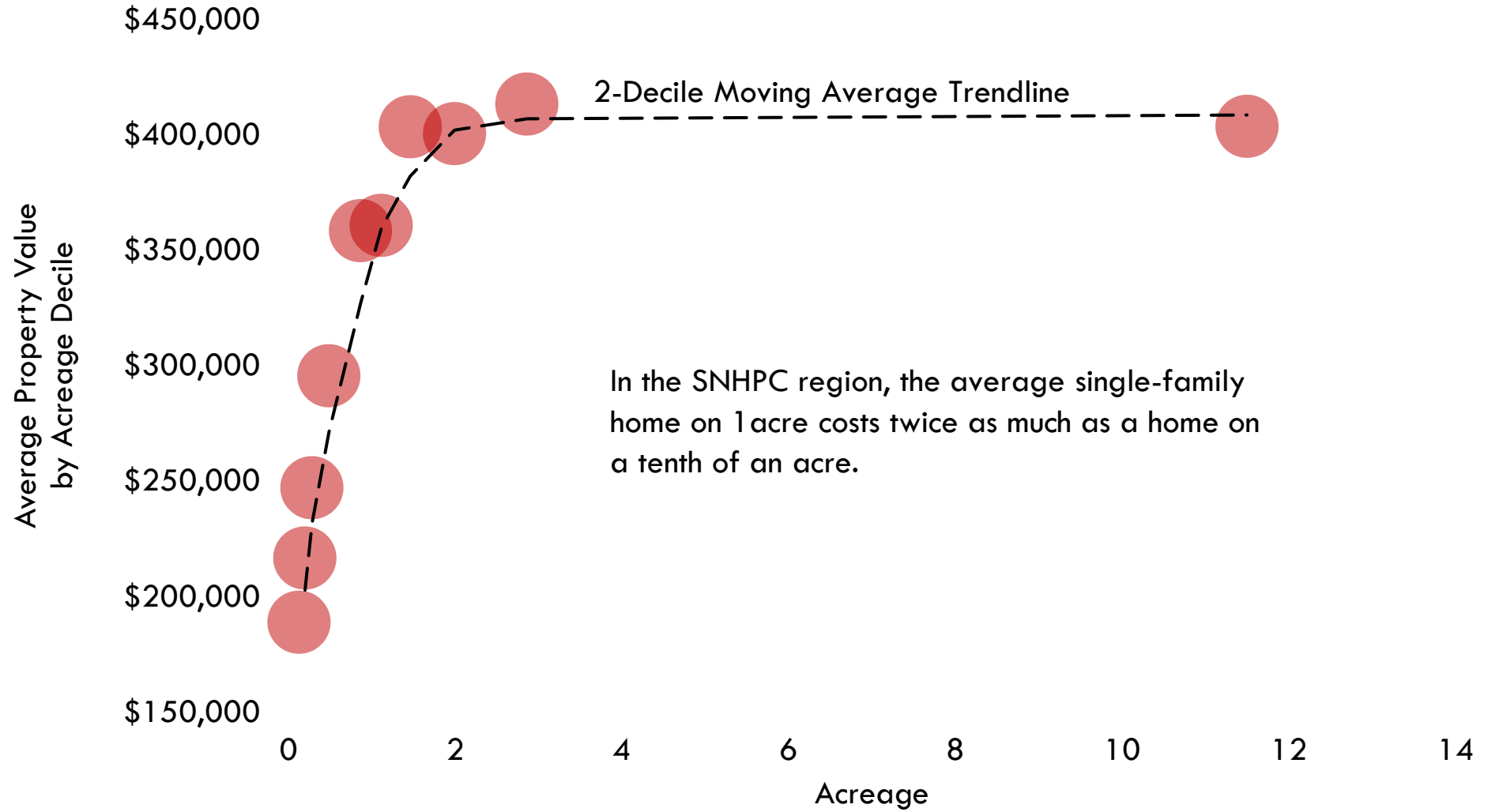


Real Municipal Equalized Property Tax Rates (per \$1,000 Valuation) in 2020 Dollars

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Auburn	\$23	\$22	\$19	\$18	\$18	\$15	\$16	\$16	\$16	\$20	\$21	\$20	\$20	\$20	\$22	\$21	\$19	\$19	\$17	\$17	\$16
Bedford	\$25	\$22	\$20	\$19	\$21	\$18	\$18	\$21	\$22	\$23	\$24	\$24	\$24	\$23	\$22	\$21	\$20	\$19	\$19	\$18	\$18
Candia	\$25	\$24	\$21	\$21	\$21	\$19	\$19	\$19	\$21	\$22	\$25	\$22	\$24	\$23	\$22	\$21	\$20	\$19	\$19	\$18	\$18
Chester	\$27	\$28	\$28	\$25	\$25	\$22	\$23	\$23	\$23	\$23	\$26	\$28	\$28	\$27	\$27	\$24	\$24	\$21	\$20	\$19	\$18
Deerfield	\$30	\$31	\$28	\$26	\$26	\$24	\$23	\$23	\$24	\$29	\$28	\$28	\$28	\$28	\$28	\$25	\$24	\$22	\$21	\$19	\$19
Derry	\$35	\$35	\$32	\$30	\$25	\$25	\$27	\$27	\$29	\$31	\$33	\$31	\$33	\$31	\$30	\$29	\$27	\$27	\$25	\$23	\$22
Francestown	\$36	\$36	\$32	\$28	\$23	\$23	\$23	\$24	\$26	\$24	\$28	\$25	\$28	\$29	\$27	\$28	\$29	\$26	\$26	\$24	\$25
Goffstown	\$33	\$29	\$27	\$28	\$26	\$24	\$24	\$24	\$26	\$26	\$28	\$28	\$28	\$30	\$28	\$28	\$27	\$25	\$18	\$22	\$21
Hooksett	\$28	\$28	\$23	\$26	\$24	\$23	\$24	\$22	\$23	\$25	\$27	\$27	\$28	\$25	\$24	\$22	\$23	\$22	\$22	\$18	\$19
Londonderry	\$34	\$30	\$26	\$24	\$23	\$22	\$22	\$22	\$22	\$25	\$25	\$26	\$27	\$26	\$24	\$22	\$22	\$21	\$19	\$19	\$18
Manchester	\$34	\$31	\$27	\$23	\$21	\$19	\$20	\$20	\$21	\$24	\$24	\$25	\$25	\$25	\$25	\$24	\$23	\$22	\$20	\$19	\$17
New Boston	\$30	\$26	\$23	\$23	\$21	\$19	\$20	\$18	\$19	\$23	\$24	\$27	\$27	\$27	\$27	\$27	\$25	\$25	\$23	\$23	\$20
Weare	\$31	\$27	\$25	\$23	\$20	\$19	\$21	\$19	\$21	\$23	\$25	\$24	\$25	\$26	\$25	\$25	\$24	\$23	\$21	\$20	\$19
Windham	\$24	\$23	\$21	\$21	\$18	\$17	\$19	\$20	\$21	\$24	\$25	\$26	\$26	\$25	\$24	\$22	\$21	\$18	\$19	\$17	\$18
SNHPC Median	\$30	\$28	\$25	\$24	\$22	\$21	\$21	\$21	\$22	\$24	\$25	\$26	\$27	\$26	\$25	\$24	\$23	\$22	\$20	\$19	\$18
NH Median	\$31	\$29	\$27	\$24	\$23	\$20	\$20	\$21	\$21	\$23	\$24	\$25	\$25	\$26	\$25	\$25	\$24	\$23	\$22	\$21	\$20

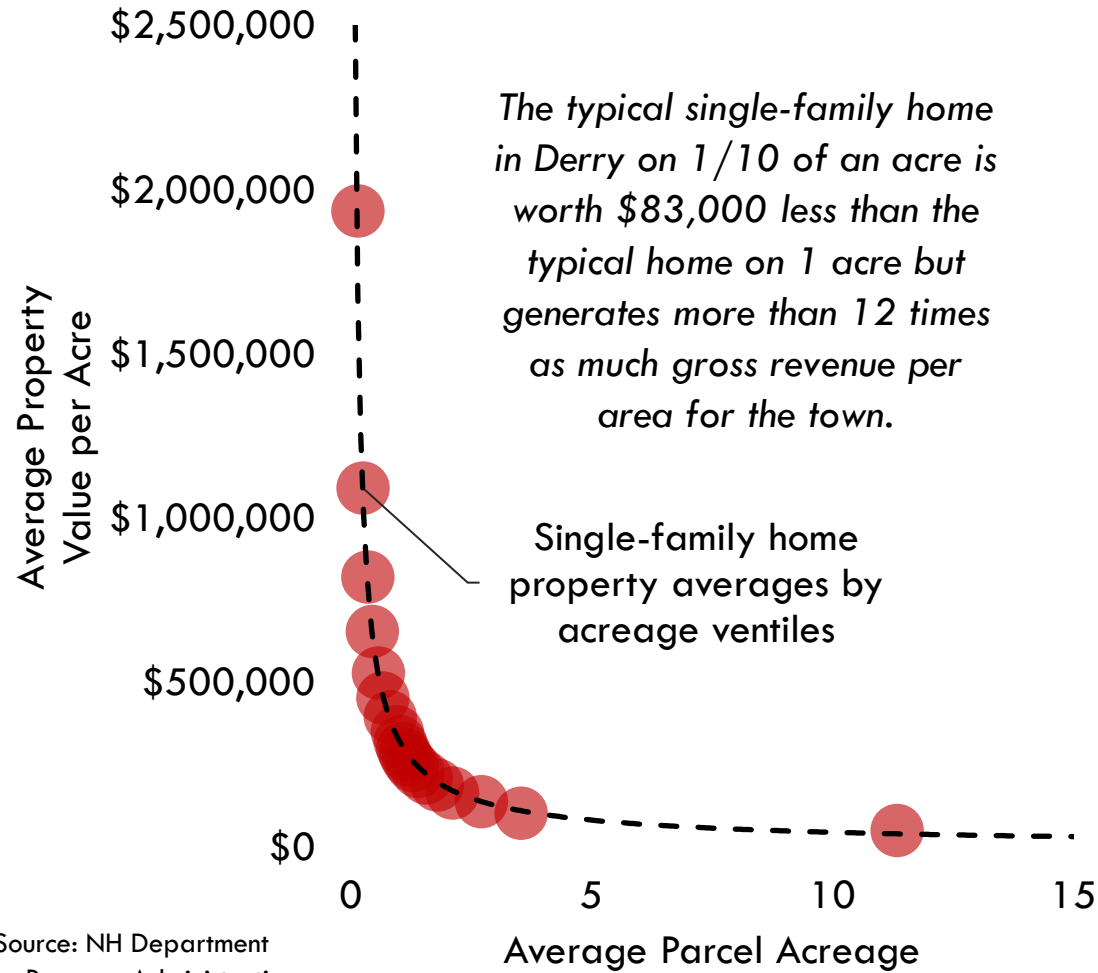
Sources: Bureau of Labor Statistics; Federal Reserve Bank of St. Louis; NH Department of Revenue Administration.

SNHPC Single-Family Homes



Source: NH Department of Revenue Administration

Derry Single-Family Homes: Value per Acre



Source: NH Department
or Revenue Administration

Derry Single-Family Homes: Gross Return on Investment

Single-Family Home Acreage	Value per Home	Value per Acre	Total Property Value of a 10 Acre Neighborhood
0.1	\$238,100	\$2,314,200	\$23,810,000
0.25	\$268,200	\$1,061,500	\$10,728,000
0.5	\$293,500	\$588,700	\$5,870,000
1	\$321,100	\$326,500	\$3,211,000
2	\$351,400	\$181,000	\$1,757,000
2.5	\$361,700	\$149,700	\$1,446,800
5	\$395,800	\$83,000	\$791,600
10	\$433,100	\$46,100	\$433,100

Source: NH Department of Revenue Administration

**Visualizing Value, Cost, and Rate of Return:
Two Single-Family Residential Properties in the Same Municipality**



Less than 1/10 of an Acre

Year Built: 1900

Floor Area Ratio: 0.46

Water & Sewer Service

Distance from Federal-Aid Eligible Roads: 365 feet (0.07 miles)

Distance from State Maintained Roads: 5,740 feet (1.09 miles)

Property Value: \$306,000

Value per Living Area: (Sq. Ft.): \$112

Value per Acre: \$3,461,100



More than 1 Acre

Year Built: 2004

Floor Area Ratio: 0.04

Water & Sewer Service

Distance from Federal-Aid Eligible Roads: 5,932 feet (1.12 miles)

Distance from State Maintained Roads: 10,075 feet (1.91 miles)

Property Value: \$507,400

Value per Living Area (Sq. Ft.): \$139

Value per Acre: \$344,200

Contact Information

Contact Information:

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Zachary Swick

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(603) 669-4664

Ken Gallagher

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Planning Lunches at Noon (PLAN) Monthly Webinar Series

- Slides and recordings of all completed webinars
- A short, anonymous online survey to gather feedback and topics for future webinars

www.nh.gov/osi/planning/planning-training.htm

Questions and Answer Section

- If you would like to ask a question, please either raise your hand and unmute yourself or type your question in the Chat box. If on the phone, lines have been unmuted



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Slides and recordings of all completed webinars

Schedule for 2023 upcoming webinars (*to be posted soon*)

A short, anonymous online survey to gather feedback and topics
for future webinars

THANK YOU