



KANSAS

STATEWIDE HOUSING ASSESSMENT



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Housing Definitions

The Statewide Housing Assessment uses several terms and phrases to describe the housing market. Not all are easily understood by all readers without explanation. Additionally, some terms may mean different things to different people. The following are terms used throughout the assessment to explain the housing market:

Appraisal

Assesses the current market value of a property and is usually a key requirement when a property is bought, sold, insured, or mortgaged. Comps (comparables) are needed; these are properties located in the same area, have similar characteristics, and have an established value (recent sales).

Move-up Housing

The natural cycle of how people move in the housing market, referring to the process of moving from renting to mid-sized owner-occupancy to larger single-family homes. The “move-up” generally occurs with income increases, assuming adequate housing supply and variety are available, opening more affordable housing options for others. Recent trends indicate that “move-up” housing may not mean square footage but may mean better finishes and amenities.

Empty-Nester

A single or couple without children living at home. Empty-nesters can include any age range but most often refers to older adults whose children have moved out and no longer live at home.

Gap Financing

Refers to a short-term loan to meet an immediate financial obligation until sufficient funds to finance the longer-term financial need can be secured.

Market Rate

The price that the broad number of home buyers or renters are willing to pay for housing. Market rate housing does not have any restrictions on price. Generally, the market rate price will go up when the demand goes up. Conversely, when supply goes down, the market rate price tends to increase. Note, the market rate price may also be a price that buyers must pay because there are no other options for their situation, putting them housing cost burdened.

Median Household Income

This includes the income of the householder and all other individuals 15 years old and over in the household, whether they are related to the householder or not. The median divides the income distribution into two equal parts: one-half of the cases falling below the median income and one-half above the median. For households and families, the median income is based on the distribution of the total number of households and families, including those with no income. (Census.gov)

Middle Income Housing

Housing that is affordable to households that make between 80% - 120% of the area median income. This definition can vary by location and other local costs that a household must pay, such as transportation costs.

Mixed-Use

Mixed-use districts are areas with two or more different uses such as residential, office, retail, and civic in a compact urban form. Typical residential uses in a mixed-use district range from medium density to very high density uses.

Housing Definitions

(Cont'd)

“Not in My Backyard” NIMBY

A person who objects to the siting of something perceived as unpleasant or hazardous in the area where they live, especially while raising no such objections to similar developments elsewhere.

Senior Housing

Often thought of as nursing homes and assisted living facilities, senior housing in the context of this study is more broadly defined and refers to housing that caters to older adults. These housing options could include ground floor apartments, condos, housing with limited assistance, or other options that allow seniors to live independently with less maintenance.

Affordable Housing

Any housing that is not financially burdensome to a household in a specific income range. Financially burdensome could be housing expenses that exceed 30% of household income. However, it could also include situations where a household has high childcare costs, student debt, or other expenses that limit income to spend on housing. Housing subsidized by Federal programs can be included in this definition.

Rent, Contract

For renter-occupied units, the contract rent is the monthly rent agreed upon regardless of any furnishings, utilities, or services that may be included. Data for contract rent excludes units for which no cash rent is paid. (Census.gov)

Rent, Gross

Gross rent is the contract rent plus the estimated average monthly cost of utilities (electricity, gas, and water and sewer) and fuels (oil, coal, kerosene, wood, etc) if these are paid by the renter (or paid for the renter by someone else). (Census.gov)

Universal Design

The process of creating products that are accessible to people with a wide range of abilities, disabilities, and other characteristics. Ideally, the concept extends to neighborhoods.

Housing Definitions

(Cont'd)

PRODUCT DEFINITIONS

Conventional Single-Family Detached

Conventional single-family detached housing, with gross density at or below four units per acre, corresponding to a typical lot size of at least 8,000.



Small Lot Single-Family Detached/Attached

A gross density of about 6-8 units per acre. This suggests a lot size range of between 4,000 to 6,000 square feet for single-family homes. This category may also include single-family homes with accessory dwelling units, duplexes, and twin homes.



Single-Family Attached, Low-Density Townhomes, and Multiplexes

Various configurations, including row houses, townhomes, and small multiplexes with a gross density of between 8 to 12 units per acre.



High Density Townhomes and Multi-Family

Typically with a gross density of 16 units per acre and above. These would be most traditional apartments and mixed-use buildings in downtown or other compact settings.



Policy & Program Examples (Cont'd)

Many communities have used various funding sources to craft local programs to address local needs. Some local programs formed as a result of a housing needs assessment and others from a few people understanding a need and finding a solution. It would be impossible to list all the housing and related support programs used by the hundreds of cities, counties, and regional entities throughout Kansas. The following list are the efforts heard throughout the spring and summer of 2021.

Middle Income Housing

- City of Humboldt had a program in the past to survey elderly who would like to move into maintenance free housing.
- Wichita Places for People Plan - An Affordable Housing Fund was under development in 2021.
- Norton City/County Economic Development - Free Lot Program. Qualified developers can have specific lots cost-free within the cities of Almena, Lenora, or Norton for new residential units. Eligible projects include a minimum specified quantity/quality of new residential structures meeting design and timing specifications set out for that parcel of ground.
- Norton City/County Economic Development - Build on Cleared Lot Incentive. Build a new home on a cleared lot with city infrastructure in Almena, Lenora, or Norton and receive a bundled package of grants and incentives of approximately \$10,000 to \$12,000.
- Norton City/County Economic Development - Senior Living Relocation Incentive. Residents of Almena, Lenora, or Norton transitioning from home ownership to qualifying senior housing, assisted living, or long-term care within Norton County can receive a one-time grant of \$5,000 at home closing.

Conservation of Older Housing Stock

- Ellis County has used funds from the Dane Hansen Foundation for a Purchase-Rehab-Resale type program in (developer rehab program).
- Dodge City Ford County Development Corporation/ Community Housing Association of Dodge City - Community Home Renovation Program. CHRP assists residents in renovating homes to increase value and lifespan. There are specific programs to assist in painting homes, rehabbing vacant homes, and constructing new homes on vacant lots.
- Wichita Places for People Plan - Land Bank is being developed and will promote the revitalization of neighborhoods consistent with the Wichita: Places for People plan, through management and transfer of properties that are deemed underutilized.
- Norton City/County Economic Development - Fix and Flip Program. Applicants can get 0% interest short-term funding for the purchase, renovation, and resale of housing. Qualifying units include those identified as dilapidated or major wear in the 2019 Norton Countywide Housing Study.

Policy & Program Examples (Cont'd)

- Overland Park - Exterior rental inspection program. A two-year cycle of inspections of the exterior elements of rental property throughout the city.

Diversity of Housing

- Newton had a speculative house program that offered up to ten builders a speculative housing finance guarantee. Once a Certificate of Occupancy is obtained, the City will cover the carrying costs up to \$10,000.
- Catholic Charities of Northeast Kansas - Emergency Assistance and Transitional Housing provides an array of housing services from rental assistance to avoid eviction and a case manager to help find long-term solutions.
- City of Frankfort - Free lots on a city-owned golf course. Eight lots were bought and filled with expensive housing over 2,000 square feet. While all the homes were upper-income homes, there were two or three built to replace an existing home in Frankfort, opening up a lower price point home in the community.
- City of Fort Scott - Small Homes. While not initiated by the City, a local builder/developer completed smaller home footprints of 782 square feet.

Building the Human Capital

- The Columbus Housing Interest Committee. This committee meets regularly to discuss housing needs and potential solutions. More people are stepping up with ideas and investment offers. Homeowners are becoming more conscientious about the upkeep of their property. Community workdays and cleanup events are well attended.
- Lawrence Housing Toolkit. Outlines a variety of possible tools and strategies that have been utilized in other communities to meet similar housing goals identified for Lawrence.
- United Community Services of Johnson County - Housing for All Toolkit. Serves as a go-to resource for local governments, organizations, service providers, developers, and residents to learn about, take action, and contribute to housing solutions. <https://ucsjoco.org/housing-toolkit/case-studies/#preserve-stock>

Building Trades Labor Shortage

- There are several areas with community college or high school programs, current or former, to build a house a year.
- Plainville Free Land Program resulted in local people building their own homes to move into rather than developers coming in to build new homes.
- Blue Rapids - Marshall County Partnership 4 Growth (MCP4G) and the city mayor have been considering workforce housing through small homes like cabins and modern container homes built by Highland Community College for alternative housing options.
- Habitat for Humanity - Various programs throughout Kansas that are primarily volunteer based to build affordable homes, home repair, maintenance, and other resources.

Housing Demand

A Guide to Forecasting Housing Needs

A traditional population projection that translates population growth based on historical trends to housing unit demand does not apply to many parts of Kansas. The population in many counties has declined over the past several decades, which under a traditional projection model, would indicate little to no need for new housing units. However, listening sessions and the community surveys show the opposite is true. Community engagement suggests a need for housing variety and supply. Data from the Kansas Department of Labor also indicates strong current job opportunities and projected regional job growth.

For these reasons, population growth and housing needs hinge on new regional and local employees who need to live in the region. Counties losing population cannot expect significant population growth in the short term. Population stabilization and growth through strategic housing and community actions are feasible.

This guide is meant to be a reference to understand the methodology of forecasting housing demand by region. Unless otherwise noted, all data comes from the U.S. Census Bureau, American Community Survey, and the Kansas Department of Labor.

Regional Employment Projections

Based on regional employment projections through 2028 from the Kansas Department of Labor, a portion of new jobs can and will be filled by people who live in each region. The forecast uses current ratios of where regional residents are employed to project the number of new jobs through 2028 to be filled by people living in the region, assuming the current balance is maintained.

Job Openings From Retirements

A portion of residents in the region will retire by 2028. Responses from the surveys show that many would like to age in place after retirement. Jobs that new retirees previously occupied will open for new employees, but a housing unit will not. The forecast considers a new housing unit demand created by new employees filling positions of recent retirees.

Replacement Need

The data in previous sections regarding the condition of the existing housing stock in 2020 provides the number of units in very poor condition in each county. A portion of these homes require demolition. Other houses will be lost from accidents such as fires or neglect across each region. Homes in poor condition or obsolete (many already vacant) should gradually be replaced in a city's housing supply.



Housing Demand Forecast

This analysis builds on the employment projections, housing trends, and community conversations to forecast the demand for additional housing. The following assumptions are made:

- Every 0.50 projected new job in the region creates the need for one housing unit. The ratio is not one-to-one because:
 - › A single household may occupy more than one new position.
 - › Existing residents will fill some jobs (who may change jobs from another regional employer).
 - › The uncertainty in the future of remote work.
- Thirty-five percent of people aged 55-64 will retire and stay living in the region through 2028. Thus, a job becomes open, but a housing unit does not. The assumption may seem conservative. However:
 - › A portion of these people will continue working beyond 2028.
 - › Employees outside the region will fill some of the retirement openings (in-commuters).
 - › Some retirees will move in with family members.
 - › Other retirees will discover their preferred housing option is not available in the region and move elsewhere.
- The population is aging in most regions and will decline over time without an in-migration of residents or significant change in birth rates. Therefore, the forecast for housing unit demand subtracts the number of units that open from the deaths of current residents.
- The average number of people per household is expected to remain constant over the next decade. However, household size may decline as the population ages, and more households become one or two persons without kids. Conversely, household size may increase if trends in shared household living increase.
 - › Because the American Community Survey does not report median household size in geographies that align with the regions used in this assessment, the median size reported for the State of Kansas is used for consistency.
- A manageable housing vacancy provides housing choices for new residents moving to a community. Vacancy rates are generally high in many counties in Kansas, particularly in more rural areas. Community conversations did indicate low vacancy across the state, with vacant units mostly from poor condition. However, programs to remove these vacant units in dilapidated conditions would decrease the vacancy rate in many areas. Conversely, it is expected that vacancy rates would increase as more units are added to the market and demand and supply balance. Therefore, vacancy rates are not factored into housing unit demand.
- A fixed number of replacement units are added to the total housing unit demand in the region. The replacement unit needs are calculated by assuming that 25% of units rated in “Very Poor” condition by the Kansas Property Valuation Division will need to be demolished in the forecast period. This can also include homes demolished because of accidental fire, natural hazards, or redevelopment.
- Most new demand will be met within the largest cities in each region.



Needs by Price and Housing Type

Building on the housing demand forecast, a development program for each region can forecast owner- and renter-occupied unit targets based on the following assumptions:

- Owner-occupied units will be distributed roughly in proportion to the household income for whom owner occupancy is an appropriate strategy.
- Most low-income residents will be accommodated in rental units.
- An allocation of owner/renter split of new housing is applied based on local conditions in each region.
 - › For most regions, the private market can produce very few homes priced below \$150,000 without access to affordable lots and assistance programs. Most of this demand will be met through a filter effect created by the production of move-up housing.
 - › New rental housing construction traditionally demands rents in the range of \$1 per square foot and higher. Therefore, to produce rental housing priced below \$650 per month, programs like low-income housing tax credits and Section 8 will need to be leveraged.

It is important to note that these are not production goals. For example, more homes constructed at \$250,000 or rents at \$800 a month may allow those living in more affordable units to change housing. Thus, indirectly producing more housing at lower price points.

Additionally, higher-density housing can produce lower unit costs, but these settings do not necessarily make lower prices. Frequently, townhome or villa developments with very high-level materials and finishes and other luxury features produce housing products that can be relatively expensive, and maintenance services provided in these luxury projects also increase the monthly cost of housing.

Population Projection

The forecast of housing needs can directly translate into projecting population growth. Under this method:

- Household size remains static at the current median for Kansas of 2.2 people per household. Every new forecast housing unit translates into a growth in the population of 2.2 people.
- The base year for the projection is 2019 to align data sources.
- An annual growth rate factors the demand forecast through 2028 to align with employment projections by the Kansas Department of Labor.

MARKET DEFINITIONS

- **Affordable-Low Ownership Demand.** The best affordable housing source is the existing housing stock in older neighborhoods. Many higher-income households compete for the same housing stock as lower-income households. The low-income ownership market demand can be met, in part, by providing opportunities for moderate-income households to move up in the market.
- **Affordable-Low Rental Demand.** Production of rental units under \$650 will likely need assistance programs like low-income housing tax credits and project-based Section 8, but some may result from market adjustments due to new higher-quality rental units creating competition in the market. It will also be essential to preserve the units existing in this price range today.
- **Affordable Moderate Ownership Demand.** It will be challenging for the private market to produce housing in this price range for many areas. Most will need to come from the existing market and individuals moving up or to other product types, freeing up homes in this price range or produced through assistance programs.
- **Market and High Market.** Typically not being produced at the level needed. These developments should be encouraged to employ innovative practices to create high-quality neighborhoods and new housing products not seen in communities.

REGIONAL NEEDS THROUGH 2028

Northeast Kansas

About 1,339-1,637 units are needed in the NE region annually for regional demand. This is above the estimated 985 average annual units built from 2010-2019*.

* Estimated from Census Permit Survey and the Kansas Department of Revenue, Property Valuation Division

SUMMARY TABLE: NORTHEAST REGION HOUSING FORECAST	UNIT RANGE
(+) Housing unit demand in NE region from regional job growth (0.5 per job) ¹	342-418
(+) Housing unit demand from retirement job openings (0.35 units per retirement)	6,314-7,717
Total housing unit demand from job openings	6,656-8,135
(+) Unit need from natural population growth	5,116-6,253
Total housing units needed before replacement needs	11,772-14,388
(+) Cumulative Replacement Need	282-345
2019-2028 Cumulative Need	12,054-14,733
Northeast Region Annual Unit Needs	1,339-1,637
1. Regardless if job is located in the NE region.	

NORTHEAST REGION POPULATION PROJECTION THROUGH 2028	
Household Size	2.2
2019 Population	344,135
2019-2028 population growth from new units	28,776
2019-2028 % Change	8.36%
Annual Population Growth Rate	0.90%

DEVELOPMENT PROGRAM: NORTHEAST REGION	
ANNUAL NEED	UNITS ANNUALLY THROUGH 2028
Total	1,339-1,637
Total Owner Occupied*	804-982
Affordable Low: <\$150K	238-291
Affordable Moderate: \$150K-\$225K	202-247
Moderate Market: \$225K-\$300K	135-165
Market: \$300K-\$400K	142-174
High Market: >\$400K	86-106
Total Renter Occupied*	536-655
Low: <\$650	132-162
Affordable: \$650-\$1,000	167-204
Market: \$1,000-\$1,500	142-173
High Market: >\$1,500	95-116
Source: RDG Planning & Design	

*60%/40% Owner/Renter split



REGIONAL NEEDS THROUGH 2028

North Central Kansas

About 415-508 units are needed in the NC region annually for regional demand. This is above the estimated 204 average annual units built from 2010-2019*.

* Estimated from Census Permit Survey and the Kansas Department of Revenue, Property Valuation Division

SUMMARY TABLE: NORTH CENTRAL REGION HOUSING FORECAST

	UNIT RANGE
(+) Housing unit demand in NC region from regional job growth (0.5 per job) ¹	67-82
(+) Housing unit demand from retirement job openings (0.35 units per retirement)	3,954-4,833
Total housing unit demand from job openings	4,021-4,914
(-) Units becoming available from natural population loss	648-793
Total housing units needed before replacement needs	3,372-4,121
(+) Cumulative Replacement Need	366-447
2019-2028 Cumulative Need	3,747-4,579
North Central Region Annual Unit Needs	415-508
1. Regardless if job is located in the NC region.	
NORTH CENTRAL REGION POPULATION PROJECTION THROUGH 2028	
Household Size	2.2
2019 Population	175,172
2019-2028 population growth from new units	8,243
2019-2028 % Change	4.71%
Annual Population Growth Rate	0.51%

DEVELOPMENT PROGRAM: NORTH CENTRAL REGION

ANNUAL NEED	UNITS ANNUALLY THROUGH 2028
Total	415-508
Total Owner Occupied*	249-305
Affordable Low: <\$150K	86-105
Affordable Moderate: \$150K-\$225K	62-75
Moderate Market: \$225K-\$300K	43-52
Market: \$300K-\$400K	40-49
High Market: >\$400K	19-23
Total Renter Occupied*	166-203
Low: <\$650	46-56
Affordable: \$650-\$1,000	54-66
Market: \$1,000-\$1,500	39-48
High Market: >\$1,500	27-33
Source: RDG Planning & Design	

*60%/40% Owner/Renter split



REGIONAL NEEDS THROUGH 2028

Northwest Kansas

Conservatively, about 102-125 units are needed in the NW region annually from regional demand. This is above the estimated 62 average annual units built between 2010 and 2019*.

* Estimated from Census Permit Survey and the Kansas Department of Revenue, Property Valuation Division

SUMMARY TABLE: NORTHWEST REGION HOUSING FORECAST

UNIT RANGE

(+) Housing unit demand in NW region from regional job growth (0.5 per job) ¹	43-52
(+) Housing unit demand from retirement job openings (0.35 units per retirement)	1,350-1650
Total housing unit demand from job openings	1,393-1,702
(-) Units becoming available from natural population loss	753-921
Total housing units needed before replacement need	640-781
(+) Cumulative Replacement Need	279-341
2019-2028 Cumulative Need	919-1,122
Northwest Region Annual Unit Needs	102-125
1. Regardless if job is located in the NW region.	

NORTHWEST REGION POPULATION PROJECTION THROUGH 2028

Household Size	2.2
2019 Population	54,781
2019-2028 population growth from new units	1,567
2019-2028 % Change	2.86%
Annual Population Growth Rate	0.31%

DEVELOPMENT PROGRAM: NORTHWEST REGION

ANNUAL NEED	UNITS ANNUALLY THROUGH 2028
Total	102-125
Total Owner Occupied*	61-75
Affordable Low: <\$150K	21-26
Affordable Moderate: \$150K-\$225K	15-19
Moderate Market: \$225K-\$300K	10-13
Market: \$300K-\$400K	10-12
High Market: >\$400K	5-6
Total Renter Occupied*	41-50
Low: <\$650	11-14
Affordable: \$650-\$1,000	13-16
Market: \$1,000-\$1,500	10-12
High Market: >\$1,500	7-8
Source: RDG Planning & Design	

*60%/40% Owner/Renter split



REGIONAL NEEDS THROUGH 2028

Southwest Kansas

About 499-610 units are needed in the SW region annually for regional demand. This is above the estimated 172 average annual units built from 2010-2019*.

* Estimated from Census Permit Survey and the Kansas Department of Revenue, Property Valuation Division

SUMMARY TABLE: SOUTHWEST REGION HOUSING FORECAST	UNIT RANGE
(+) Housing unit demand in SW region from regional job growth (0.5 per job) ¹	62-76
(+) Housing unit demand from retirement job openings (0.35 units per retirement)	2,569-3,140
Total housing unit demand from job openings	2,631-3,216
(+) Unit needs from natural population growth	1,584-1,936
Total housing units needed before replacement need	4,216-5,152
(+) Cumulative Replacement Need	278-340
2019-2028 Cumulative Need	4,494-5,492
Southwest Region Annual Unit Needs	499-610
1. Regardless if job is located in the SW region.	

SOUTHWEST REGION POPULATION PROJECTION THROUGH 2028	
Household Size	2.2
2019 Population	149,534
2019-2028 population growth from new units	10,305
2019-2028 % Change	6.89%
Annual Population Growth Rate	0.74%

DEVELOPMENT PROGRAM: SOUTHWEST REGION	
ANNUAL NEED	UNITS ANNUALLY THROUGH 2028
Total	499-610
Total Owner Occupied*	300-366
Affordable Low: <\$150K	103-126
Affordable Moderate: \$150K-\$225K	74-91
Moderate Market: \$225K-\$300K	51-62
Market: \$300K-\$400K	48-58
High Market: >\$400K	23-28
Total Renter Occupied*	200-244
Low: <\$650	55-68
Affordable: \$650-\$1,000	65-80
Market: \$1,000-\$1,500	47-57
High Market: >\$1,500	32-39
Source: RDG Planning & Design	

*60%/40% Owner/Renter split



REGIONAL NEEDS THROUGH 2028

South Central Kansas

About 719-878 units are needed in the SC region annually for regional demand. This is above the estimated 546 average annual units built from 2010-2019*.

* Estimated from Census Permit Survey and the Kansas Department of Revenue, Property Valuation Division

SUMMARY TABLE: SOUTH CENTRAL REGION HOUSING FORECAST

UNIT RANGE

(+) Housing unit demand in SC region from regional job growth (0.5 per job) ¹	115-141
(+) Housing unit demand from retirement job openings (0.35 units per retirement)	6,753-8,254
Total housing unit demand from job openings	6,868-8,394
(-) Units becoming available from natural population loss	1,217-1,487
Total housing units needed before replacement need	5,652-6,907
(+) Cumulative Replacement Need	816-997
2019-2028 Cumulative Need	6,280-7,675
South Central Region Annual Unit Needs	719-878
1. Regardless if job is located in the SC region.	

SOUTH CENTRAL REGION POPULATION PROJECTION THROUGH 2028

Household Size	2.2
2019 Population	306,448
2019-2028 population growth from new units	13,815
2019-2028 % Change	4.51%
Annual Population Growth Rate	0.49%

DEVELOPMENT PROGRAM: SOUTH CENTRAL REGION

ANNUAL NEED	UNITS ANNUALLY THROUGH 2028
Total	719-878
Total Owner Occupied*	431-527
Affordable Low: <\$150K	149-182
Affordable Moderate: \$150K-\$225K	107-131
Moderate Market: \$225K-\$300K	74-90
Market: \$300K-\$400K	69-84
High Market: >\$400K	33-41
Total Renter Occupied*	287-351
Low: <\$650	80-97
Affordable: \$650-\$1,000	94-115
Market: \$1,000-\$1,500	67-82
High Market: >\$1,500	46-57
Source: RDG Planning & Design	

*60%/40% Owner/Renter split



REGIONAL NEEDS THROUGH 2028

Southeast Kansas

About 848-1,036 units are needed in the SE region annually for regional demand. This is above the estimated 510 average annual units built from 2010-2019*.

* Estimated from Census Permit Survey and the Kansas Department of Revenue, Property Valuation Division

SUMMARY TABLE: SOUTHEAST REGION HOUSING FORECAST	UNIT RANGE
(+) Housing unit demand in SE region from regional job growth (0.5 per job) ¹	283-346
(+) Housing unit demand from retirement job openings (0.35 units per retirement)	6,990-8,543
Total housing unit demand from job openings	7,273-8,889
(-) Units becoming available from natural population loss	125-153
Total housing units needed before replacement need	7,209-8,812
(+) Cumulative Replacement Need	421-514
2019-2028 Cumulative Need	7,630-9,326
Southeast Region Annual Unit Needs	848-1,036
1. Regardless if job is located in the SE region.	

SOUTHEAST REGION POPULATION PROJECTION THROUGH 2028	
Household Size	2.2
2019 Population	312,698
2019-2028 population growth from new units	17,623
2019-2028 % Change	5.64%
Annual Population Growth Rate	0.61%

DEVELOPMENT PROGRAM: SOUTHEAST REGION	
ANNUAL NEED	UNITS ANNUALLY THROUGH 2028
Total	848-1,036
Total Owner Occupied*	509-622
Affordable Low: <\$150K	176-215
Affordable Moderate: \$150K-\$225K	126-154
Moderate Market: \$225K-\$300K	87-106
Market: \$300K-\$400K	81-99
High Market: >\$400K	39-48
Total Renter Occupied*	339-414
Low: <\$650	94-115
Affordable: \$650-\$1,000	111-136
Market: \$1,000-\$1,500	80-97
High Market: >\$1,500	55-67
Source: RDG Planning & Design	

*60%/40% Owner/Renter split



Full Survey Results

Survey Types

The input process for the Statewide Housing Assessment sought input through various surveys administered online and in paper format in the spring and early summer of 2021. If respondents answered that they work in certain housing-related fields, they were directed to separate, more targeted surveys. Responses included:

- 2,600+ Community members
- 341 Builders and developers
- 351 Housing service providers
- 515 City and county staff and elected officials
- 338 Real estate professionals

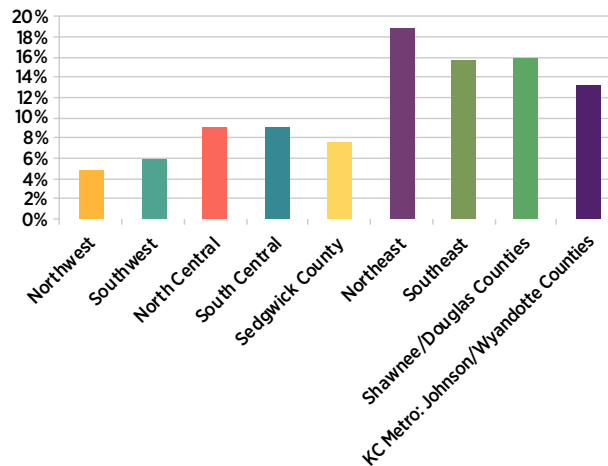
Section 3 in the main assessment breaks down responses by region. The responses in this Appendix represent all respondents from across the state. Respondent data for each survey is displayed in the order asked in the original survey. Open-ended responses and comments are excluded for length and readability.

General Community Survey

Total respondents: 2,687

Q1: Which region do you live in?

Answered: 2,637



Q2: What is the Zip Code where you live?

Answered: 2,602

- Responses available upon request.

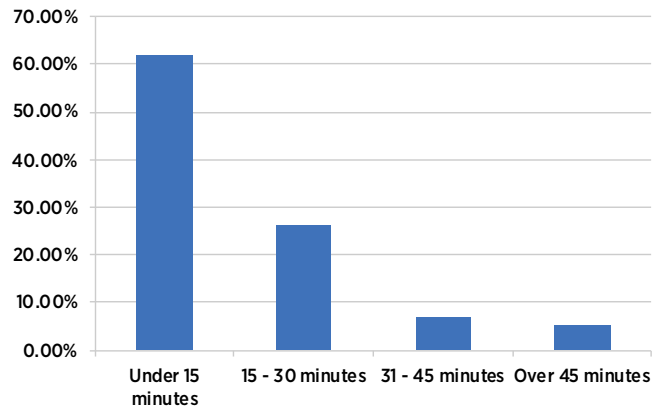
Q3: What Zip Code do you work in? If you are not in the workforce, please skip.

Answered: 1,772

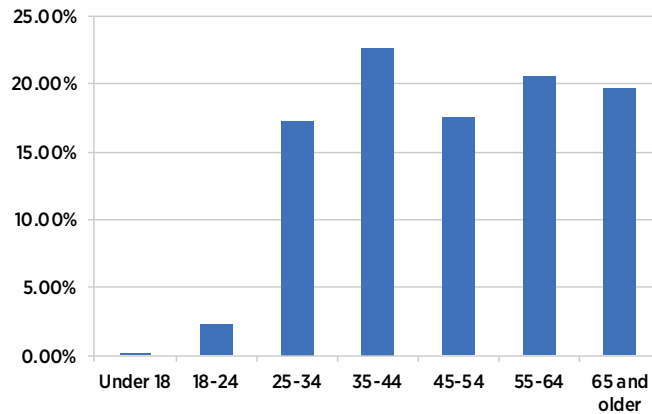
- Responses available upon request.

Q4: How long does it take you to get to work?

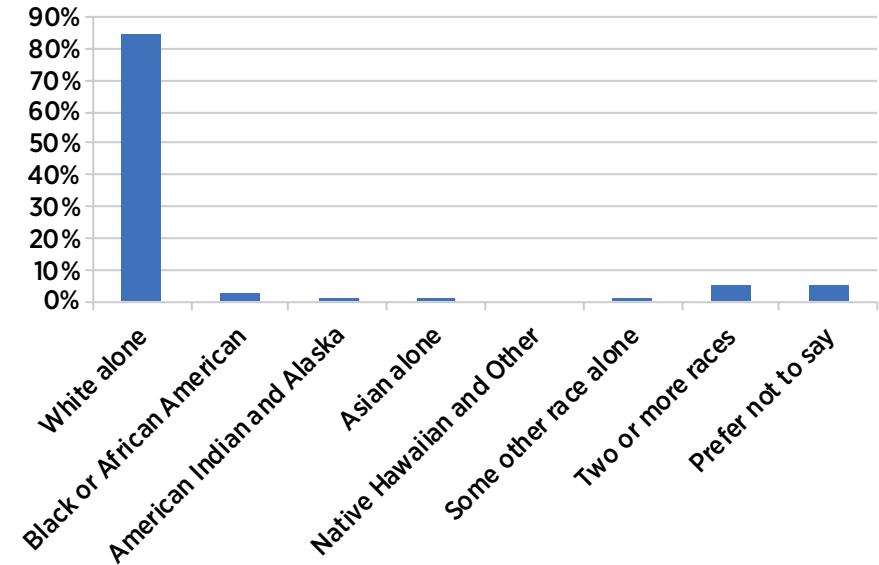
Answered: 2,009

**Q5: What is your age?**

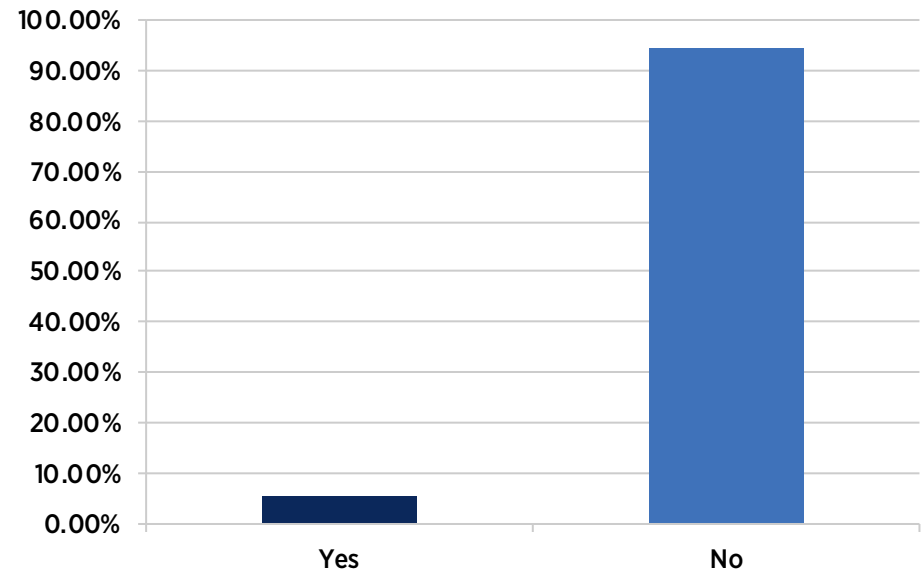
Answered: 2,590

**Q6: What is your race?**

Answered: 2,579

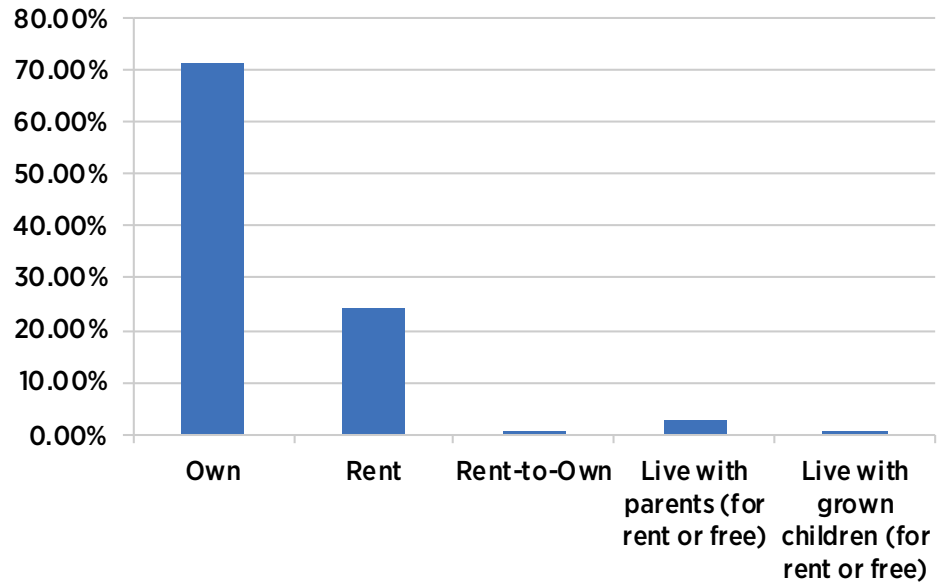
**Q7: Are you Hispanic or Latino?**

Answered: 2,508

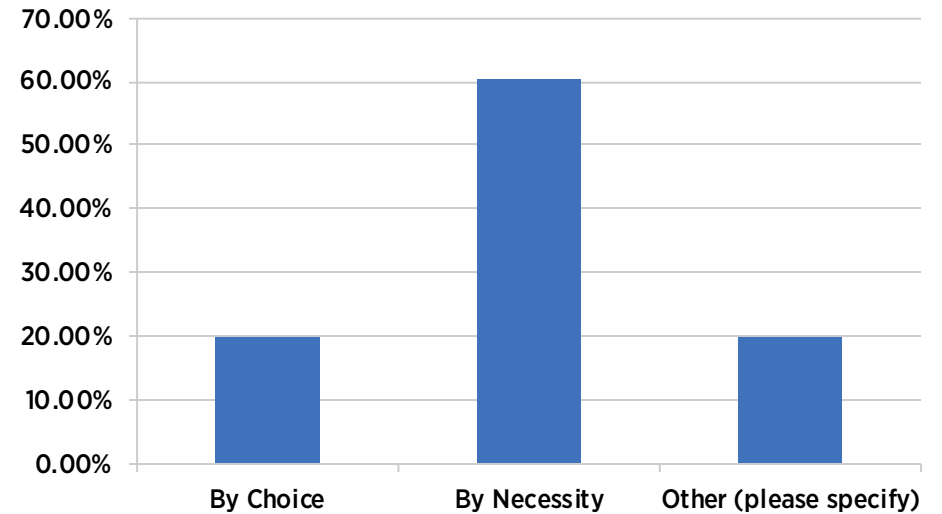


Q8: Do you own or rent your home?

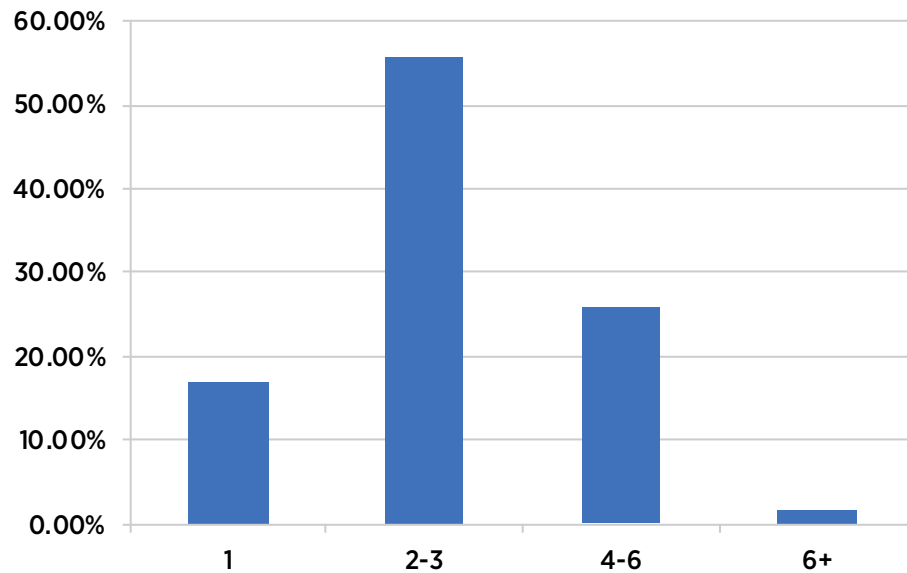
Answered: 2,590

**Q10: What is the reason you rent your home? (i.e. By choice or necessity?)**

Answered: 635 ("Other" answers available upon request)

**Q9: How many people live in your household?**

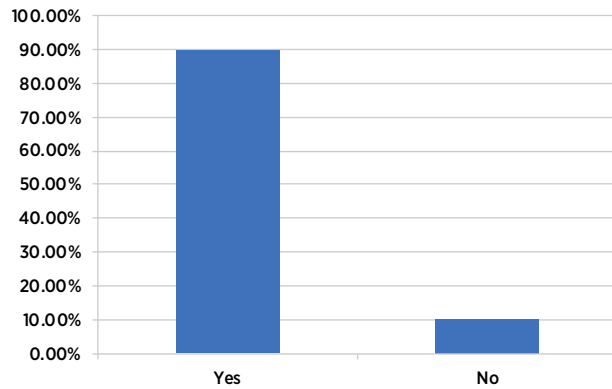
Answered: 2,595



What new types of housing do you think would be successful in your county today?
“Successful” means if available, people would want to live in this housing unit.

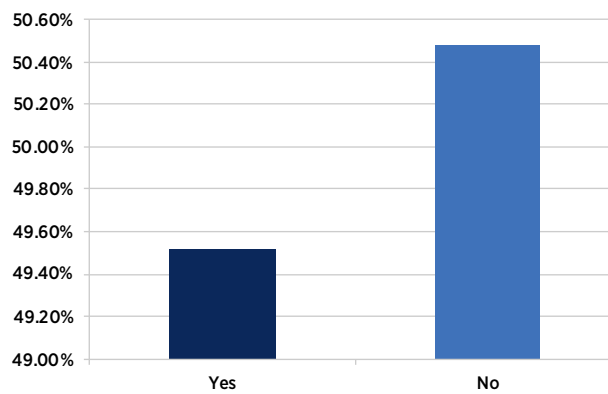
Q11: Small two- or three-bedroom house

Answered: 2,346



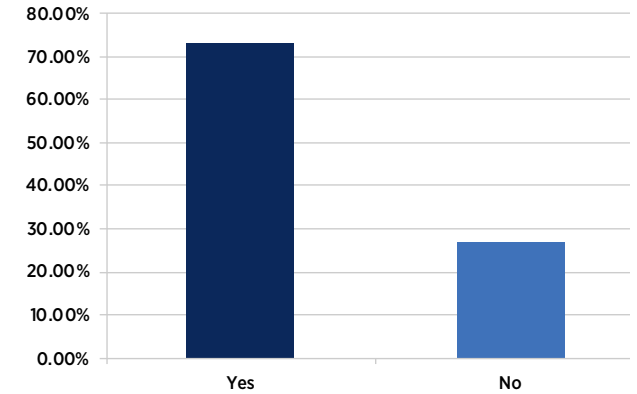
Q13: Larger home with four or more bedrooms

Answered: 2,230



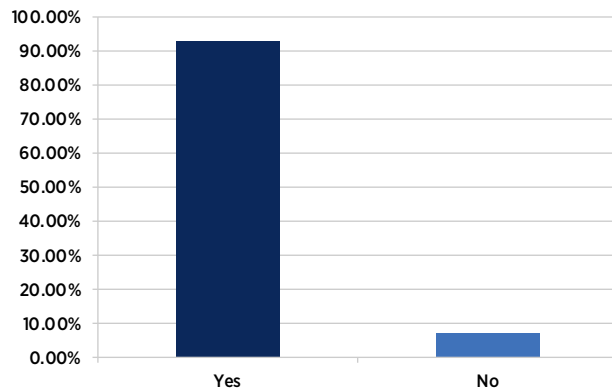
Q15: Townhouse, Duplex, Attached Units

Answered: 2,301



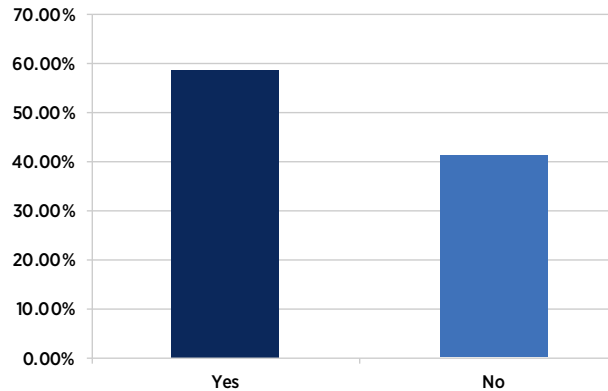
Q12: Mid-size, three-bedroom house

Answered: 2,354



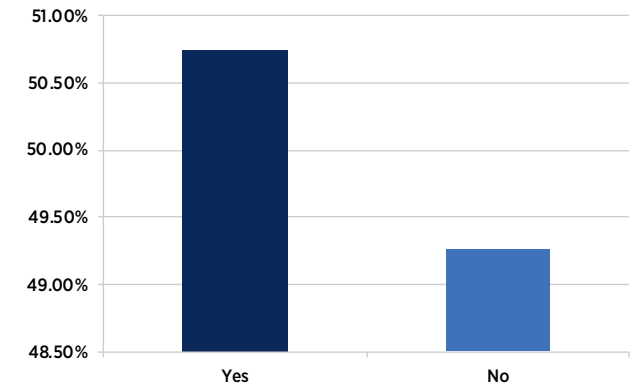
Q14: Large Lot Residential Housing (acreage)

Answered: 2,245



Q16: Row Home - Tri-plex and Above

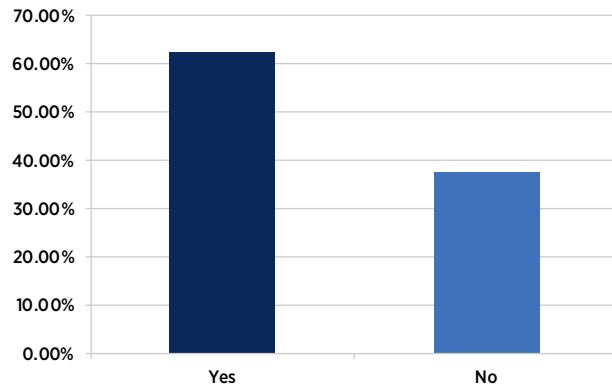
Answered: 2,254



What new types of housing do you think would be successful in your county today?
“Successful” means if available, people would want to live in this housing unit.

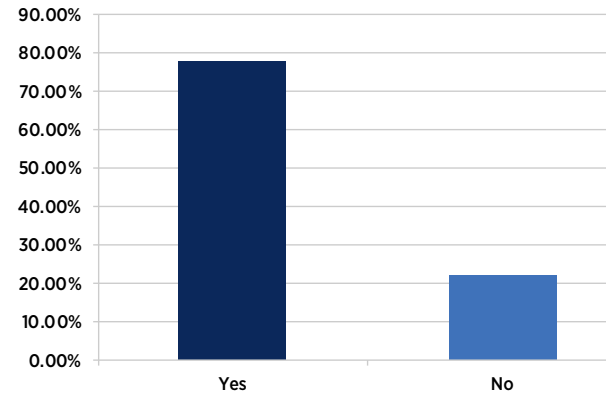
Q17: Apartment

Answered: 2,292



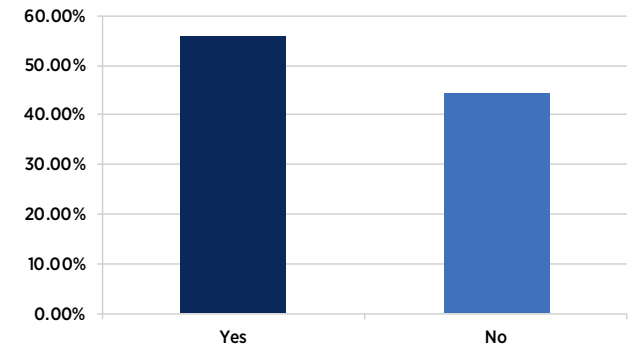
Q19: Independent - Senior Living Housing

Answered: 2,308



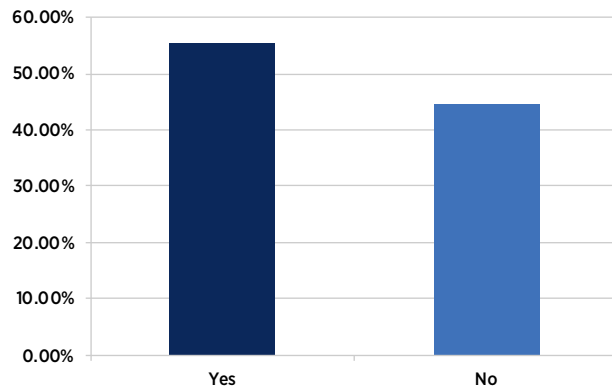
Q21: Cottage Court - A group of smaller homes that share yard space.

Answered: 2,264



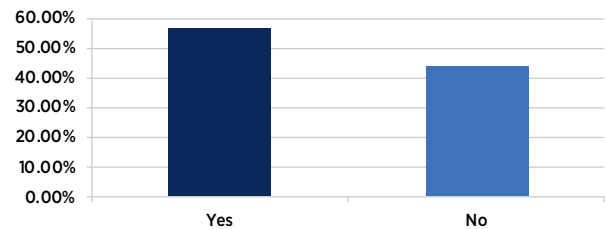
Q18: Downtown Upper-story Residential

Answered: 2,258



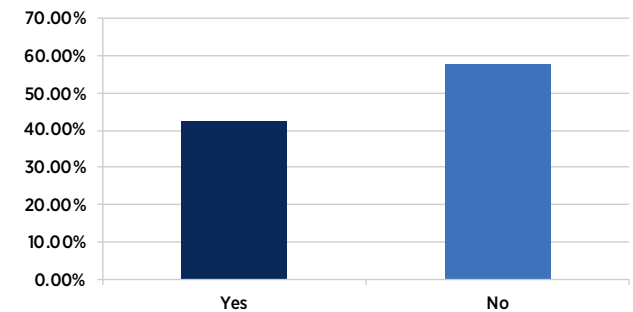
Q20: Accessory Dwelling Unit (ADU, also known as “granny flats”). A unit located on the same property as the main house, typically above a garage, a separate structure, or attached to the main house.

Answered: 2,275



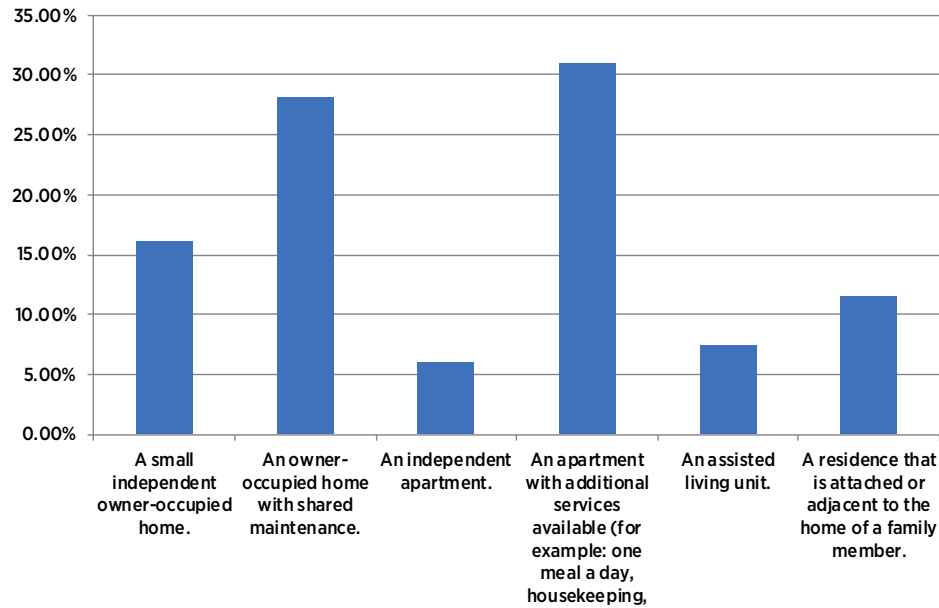
Q22: Tiny Homes, Micro-Apartments - Homes or units that are very small, generally under 500 square feet.

Answered: 2,284



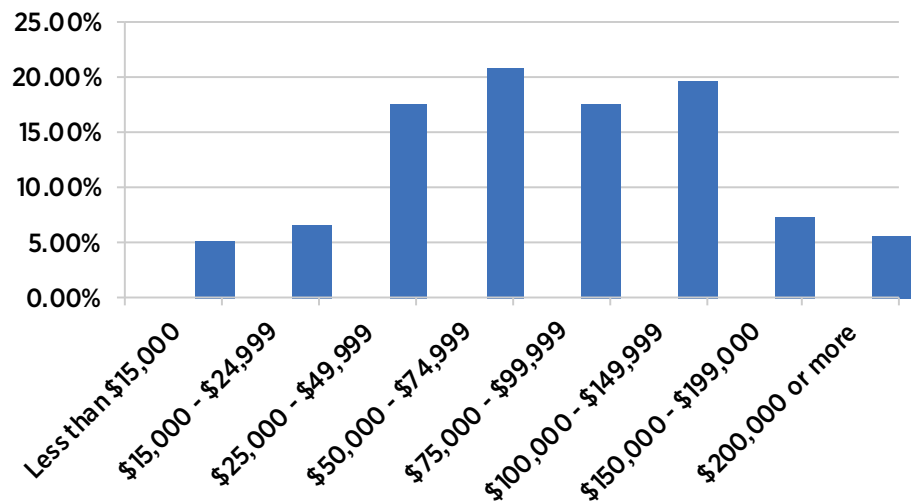
Q23: What type of housing do you believe area seniors and the elderly are most interested in? (Select One)

Answered: 2,411 (open comments available upon request)



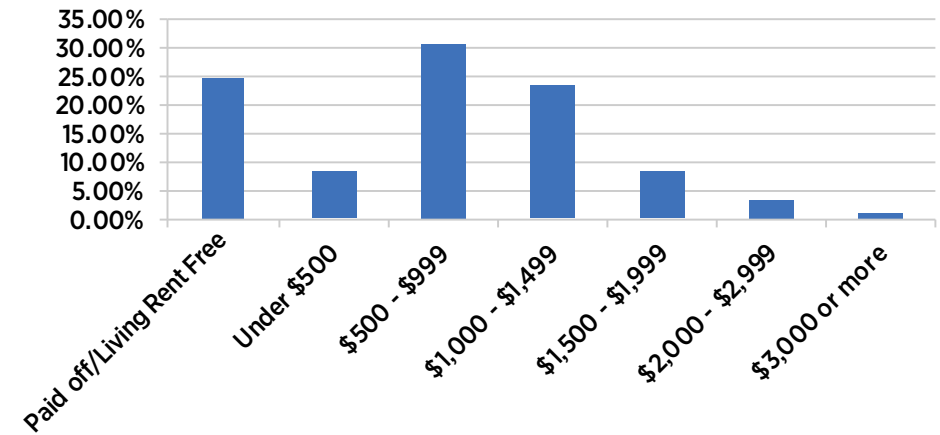
Q24: What is your household's estimated gross annual income? (all income earners)

Answered: 2,438



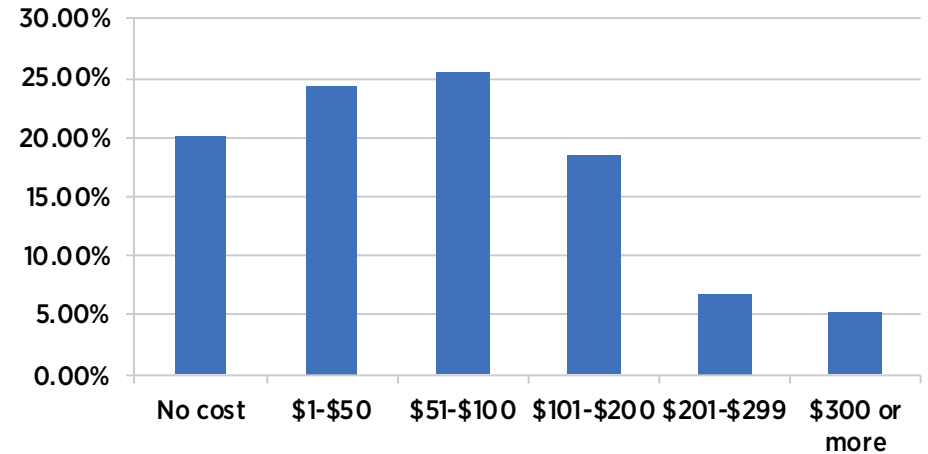
Q25: How much is your monthly rent or mortgage payment? (mortgage payment includes principle, interest, taxes, and insurance)

Answered: 2,447



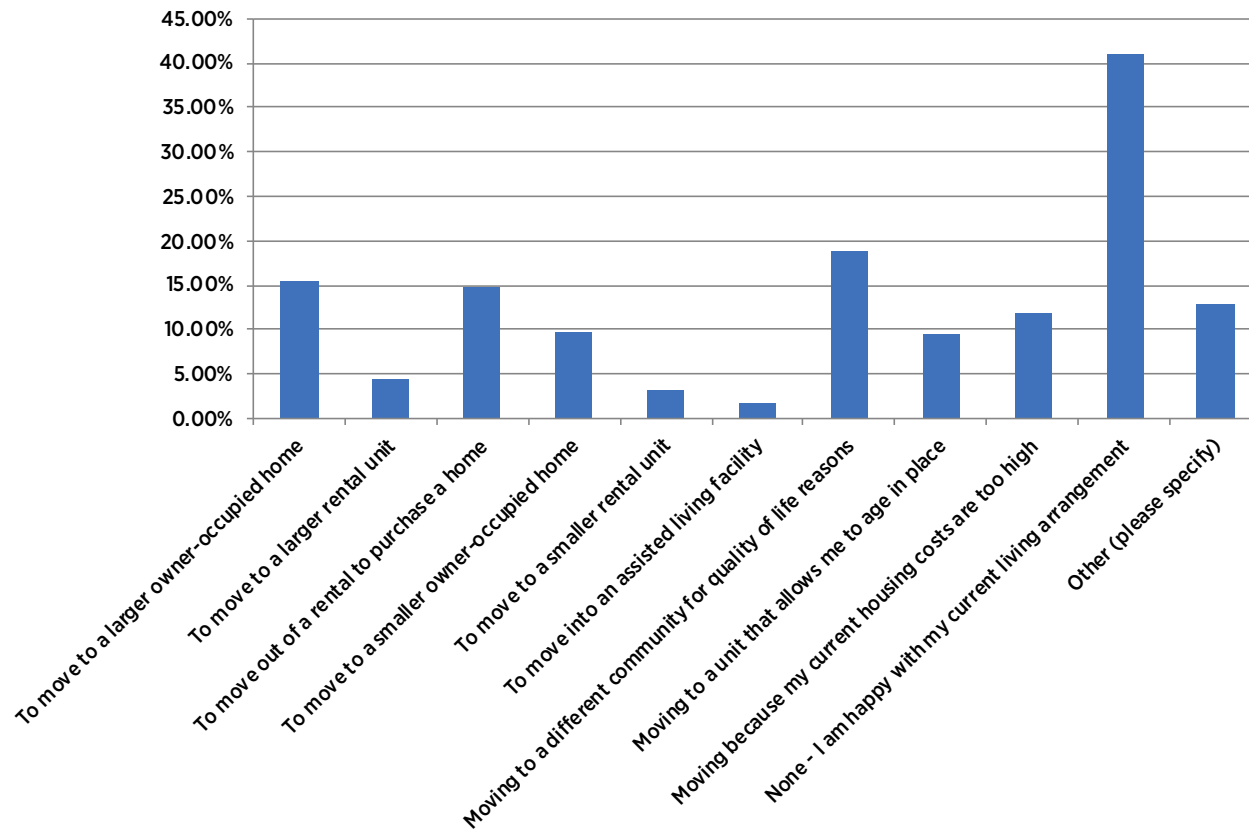
Q26: What are your estimated monthly costs for traveling to work? For example gas, transit fees, parking, repair.

Answered: 2,374



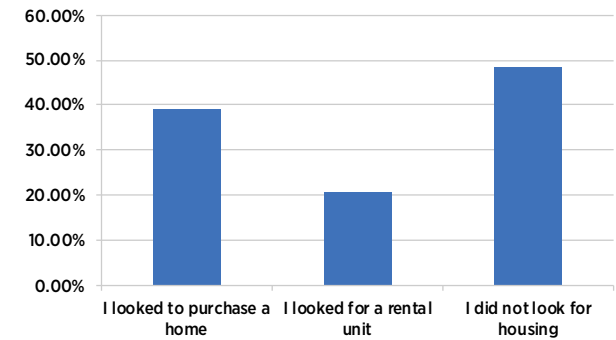
Q27: Is there any reason you'd look for a new place to live in the next three years? (Choose all that apply)

Answered: 2,459 ("Other" responses available upon request)



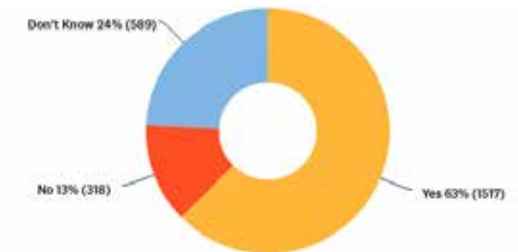
Q28: In the past three years did you look for a new place to live, regardless of where?

Answered: 2,452



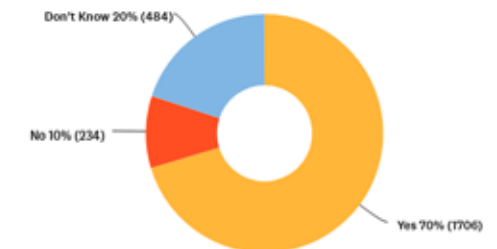
Q29: Does your city or county need increased or continued use of city/public funding to remove dilapidated housing? (a condition of housing that is beyond repair)

Answered: 2,424 (comments available upon request)



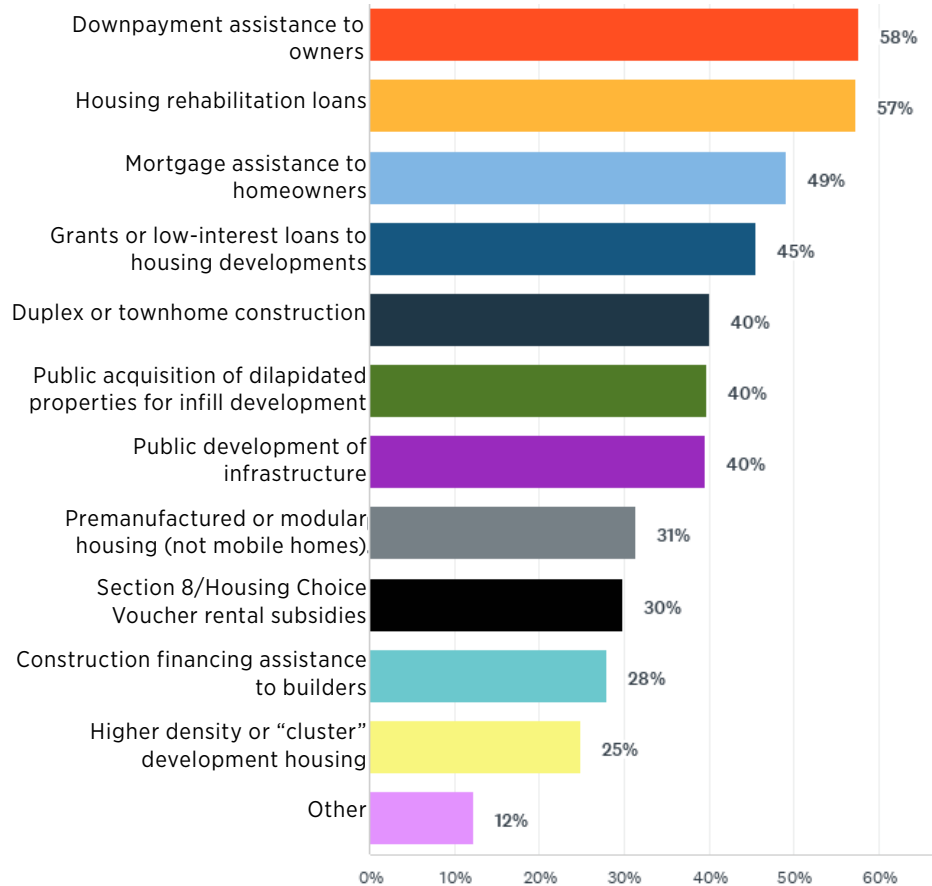
Q30: Does your city or county need increased or continued use of city/public funding for housing rehabilitation or renovations?

Answered: 2,424 (comments available upon request)



Q31: Which types of housing solutions would you support to reduce the cost of housing in your county (select all that apply)?

Answered: 2,372 ("Other" responses available upon request)

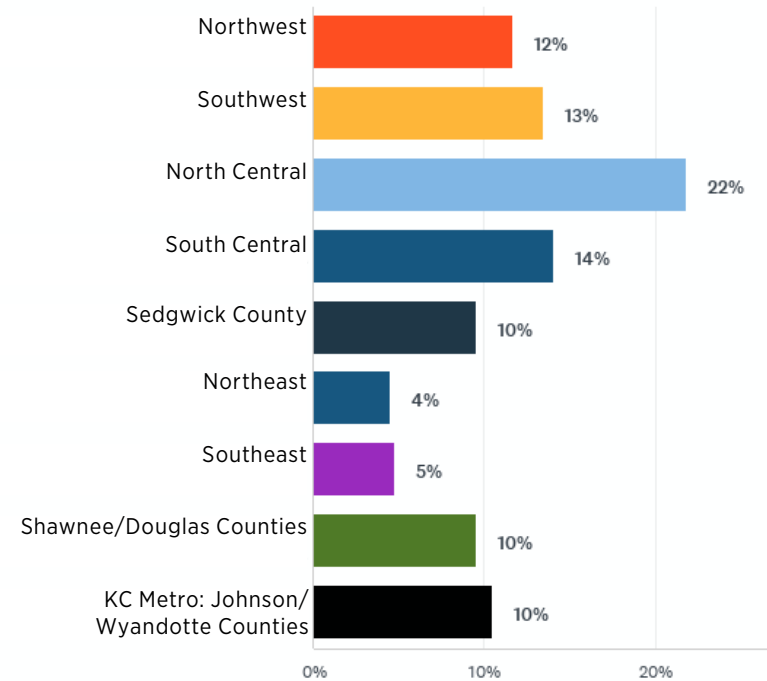


Real Estate Professional Survey

Total respondents: 338

Q1: What region do you primarily work in?

Answered: 334

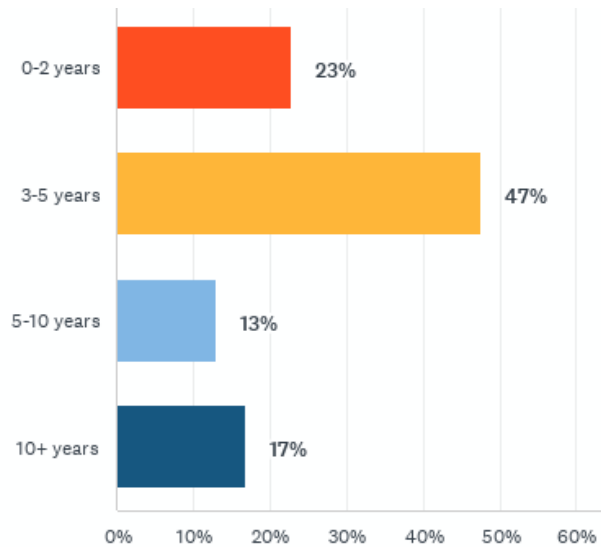


Q2: What county or counties do you primarily work in?

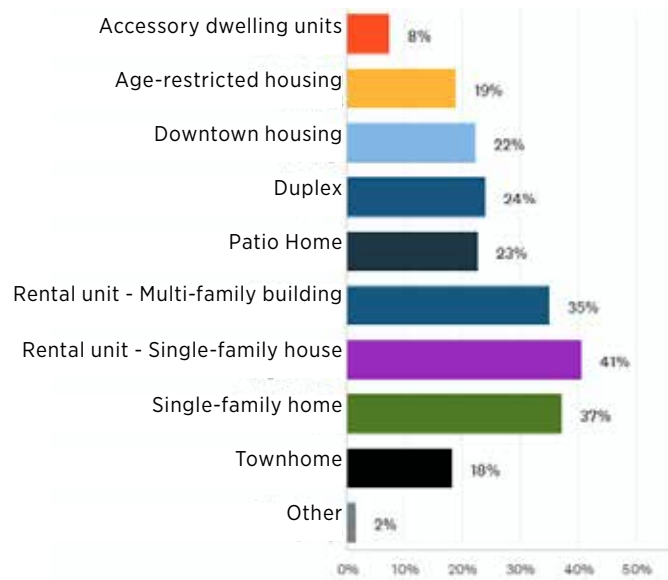
• Responses available upon request.

Q3: How long have you worked in this region?

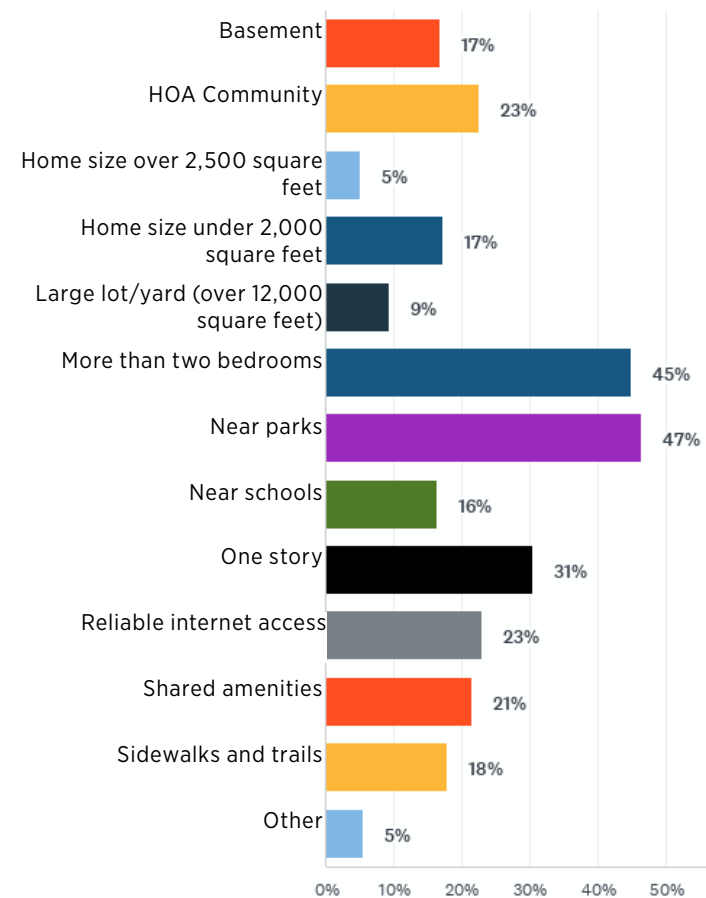
Answered: 333

**Q4: What are the most frequently requested home types that are in low supply or don't exist in your market today? (Check all that apply)**

Answered: 332 ("Other" responses available upon request)

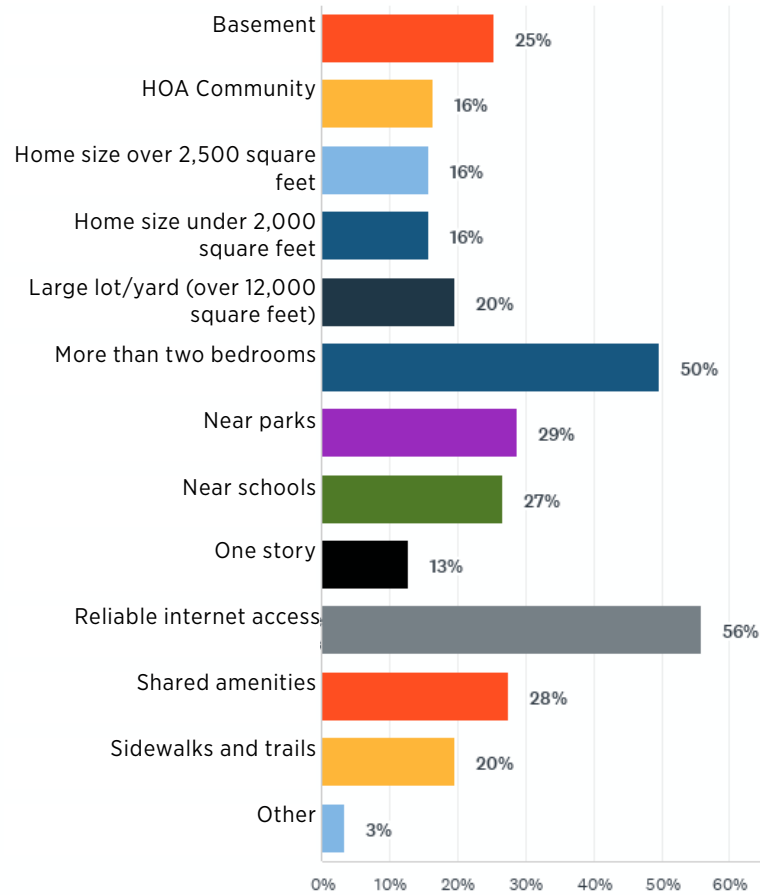
**Q5: What home features are most requested by older households (65 years and older)**

Answered: 331 ("Other" responses available upon request)



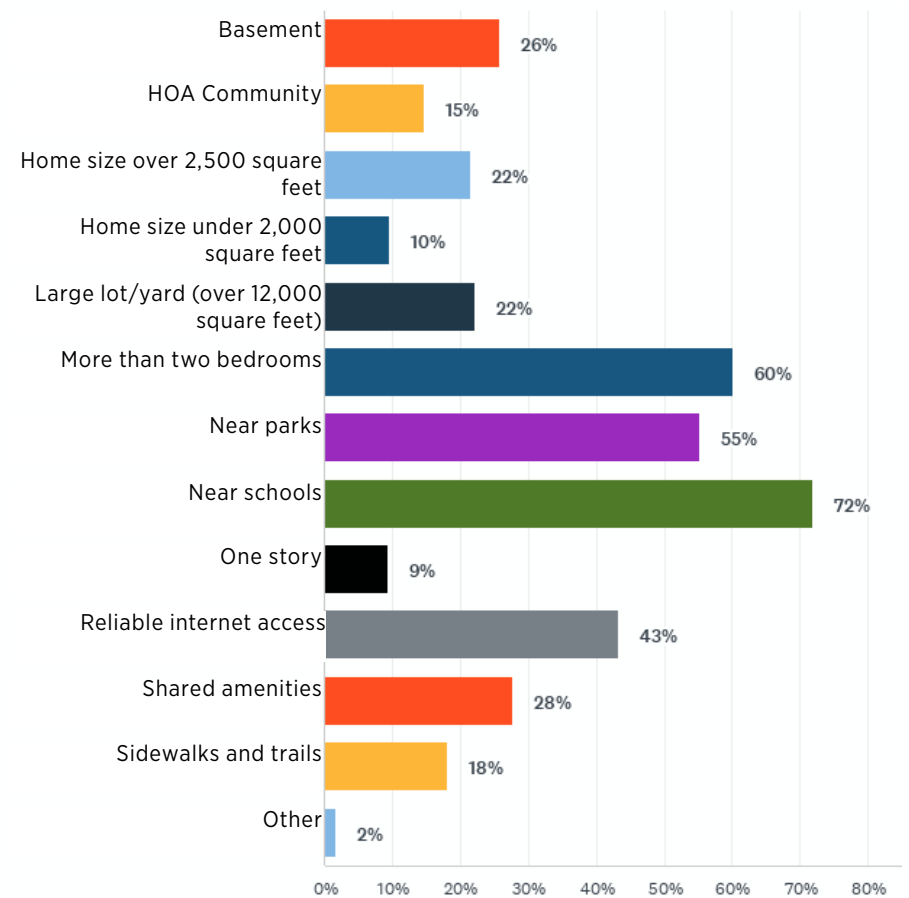
Q6: What home features are most requested by young professionals (single/partner, no children)

Answered: 330 ("Other" responses available upon request)



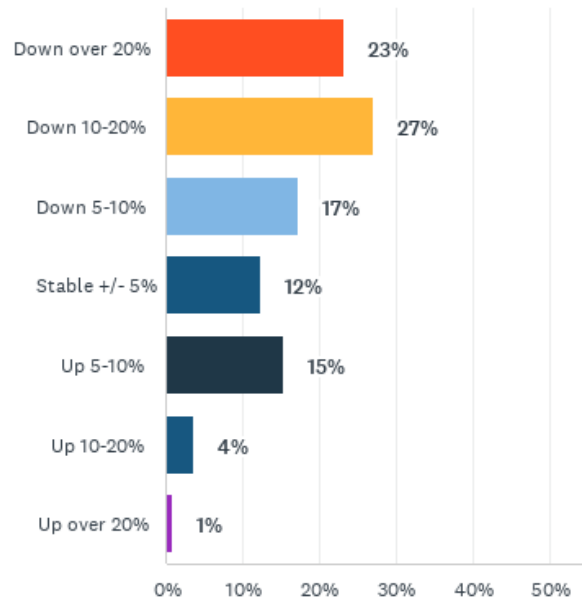
Q7: What home features are most requested by households with children.

Answered: 333 ("Other" responses available upon request)



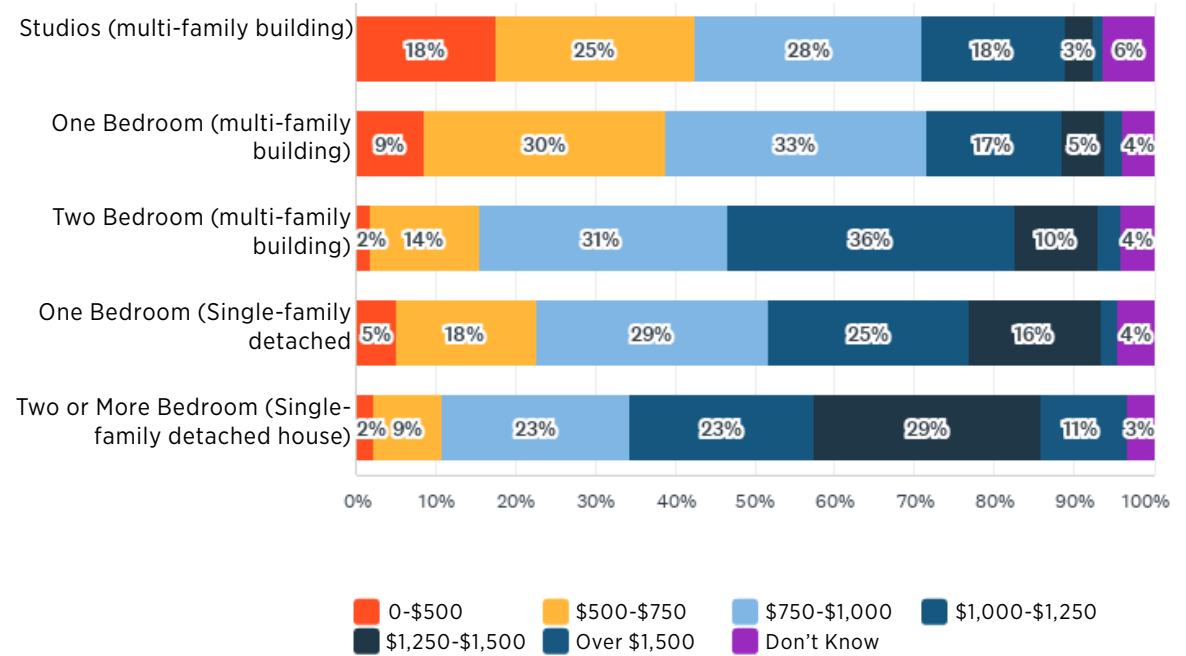
Q8: How many units are on the market in the last 12 months compared to the last several years? (percentage higher or lower)

Answered: 324



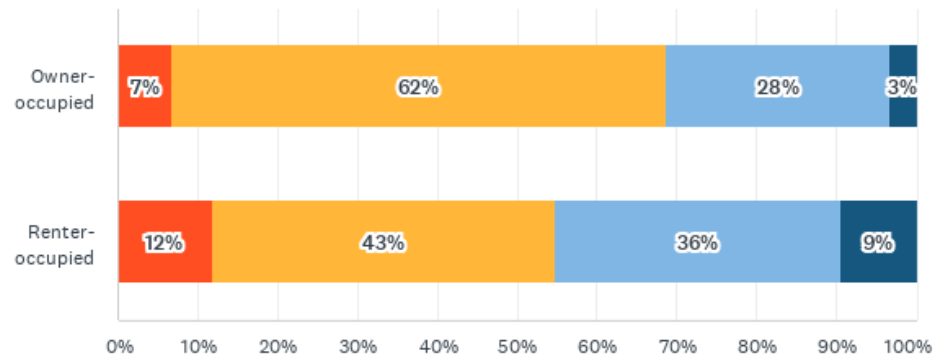
Q9: What is the estimated average rent for the following unit types built before 2000?

Answered: 321



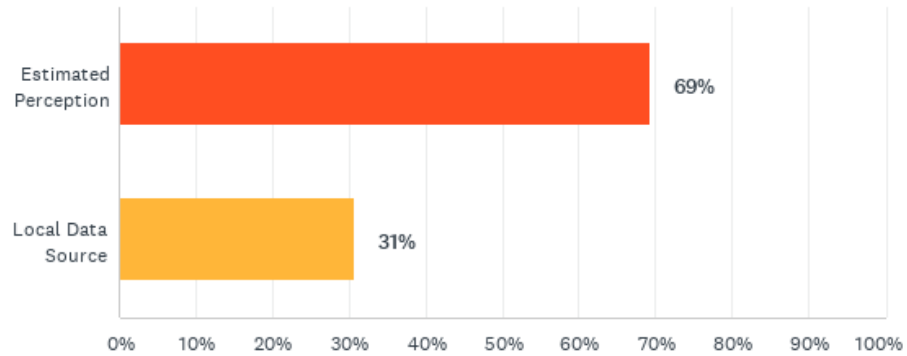
Q10: What percentage of all renter or owner-occupied units do you think are vacant in your region/county? (Vacant because the unit is not habitable, not filled because demand doesn't exist, or being held by family or an estate)

Answered: 314

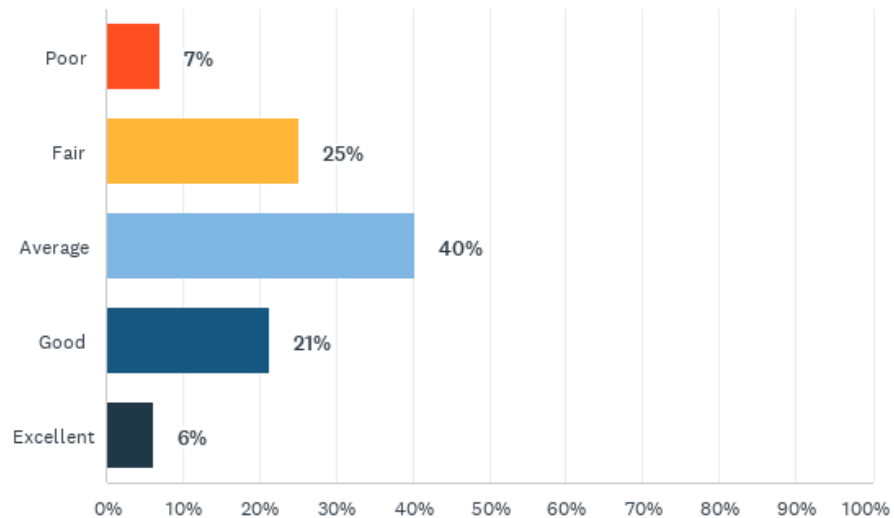


Q11: Is your answer to the previous question about vacancy rate based on perception or local data counts?

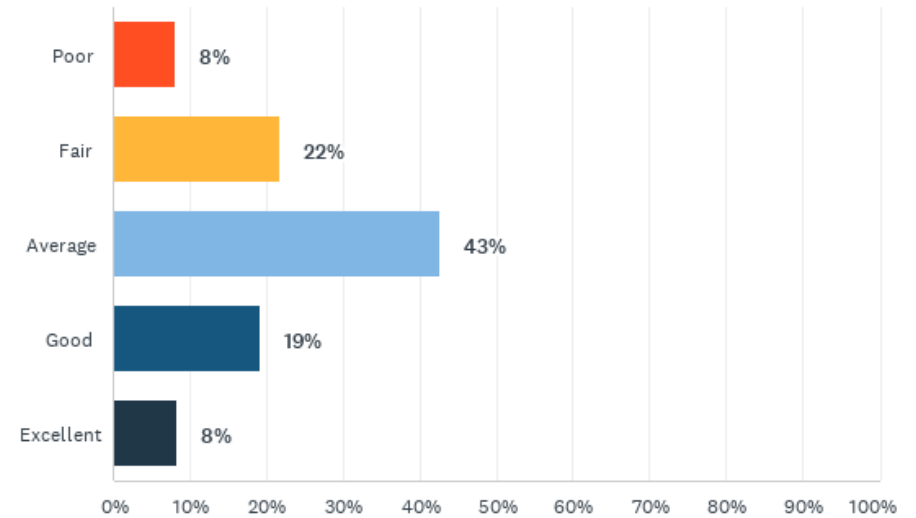
Answered: 319

**Q12: How would you rate the quality of owner units in the region/county you primarily work in?**

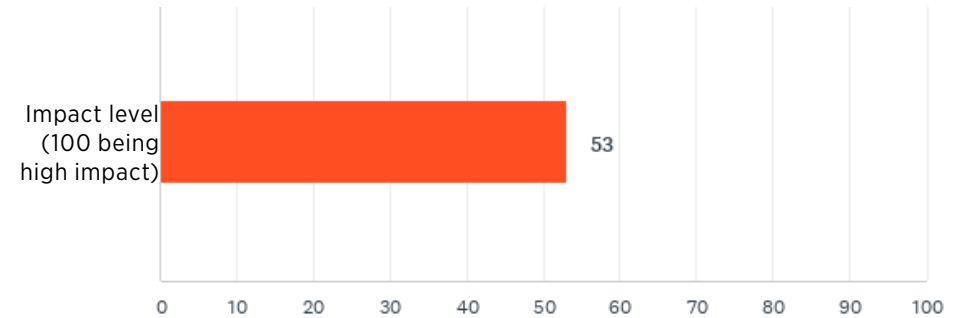
Answered: 323

**Q13: How would you rate the quality of rental units in the region/county you primarily work in?**

Answered: 322

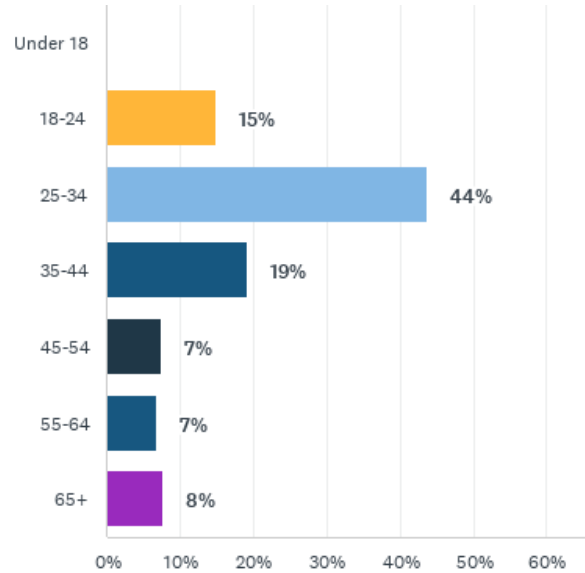
**Q14: What impact do you think housing quality has on housing values in the region, if any?**

Answered: 323

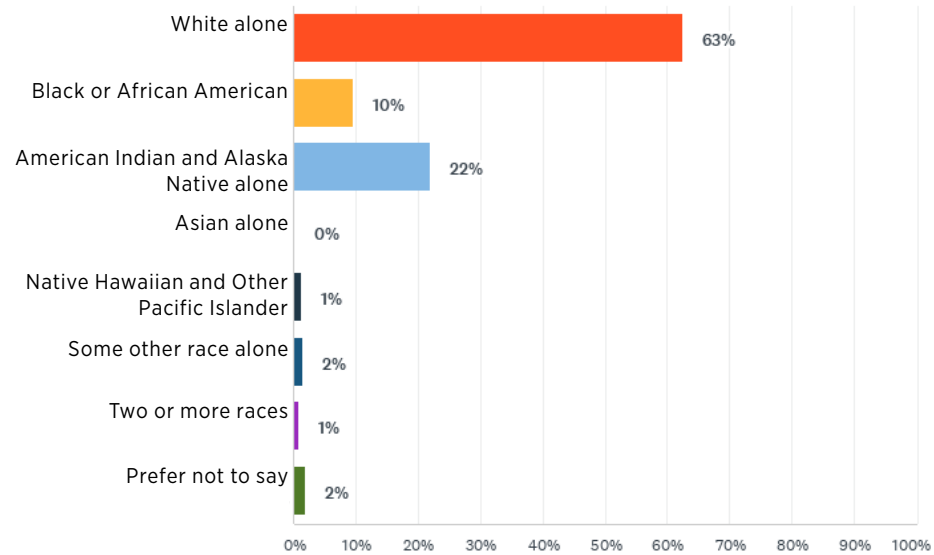


Q15: What is your age?

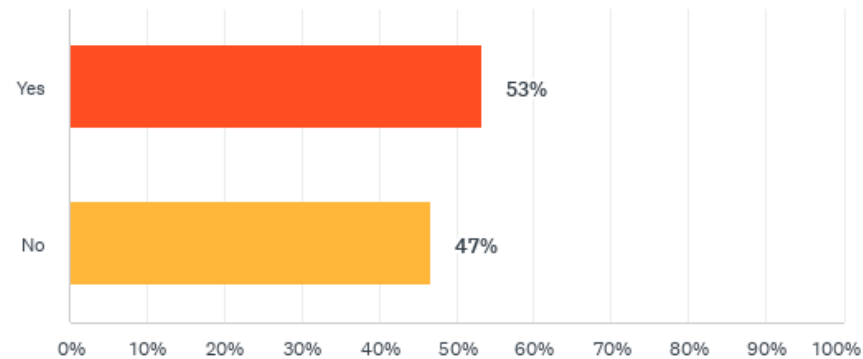
Answered: 322

**Q16: What is your race?**

Answered: 322

**Q17: Are you Hispanic or Latino?**

Answered: 322

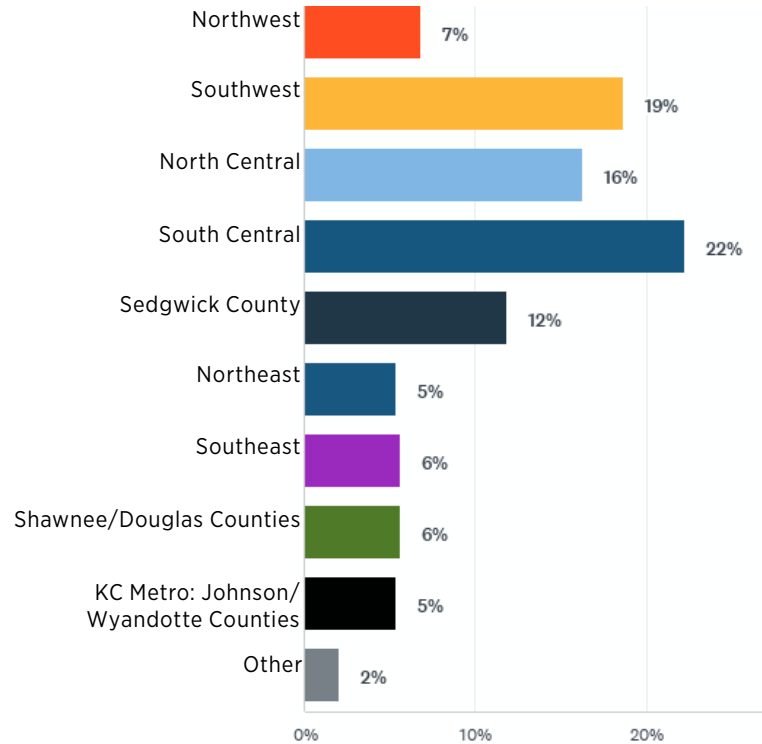


Builder and Developer Survey

Total respondents: 341

Q1: What region do you primarily work in?

Answered: 337

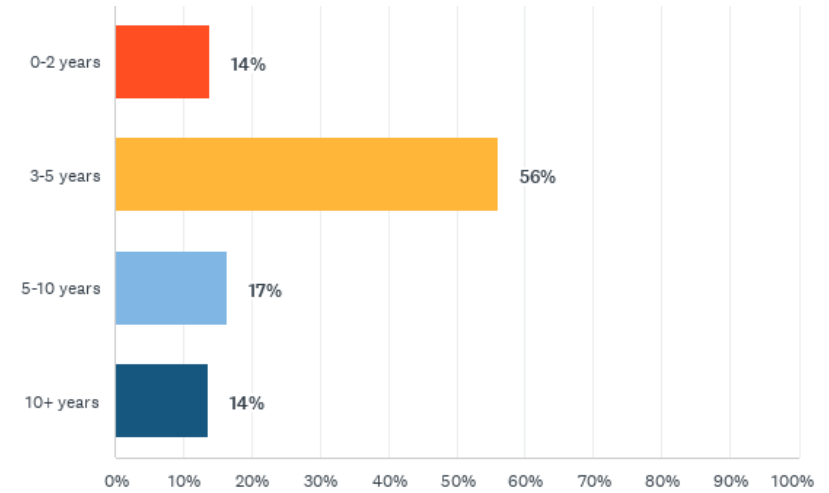


Q2: What county do you primarily work in?

- Responses available upon request.

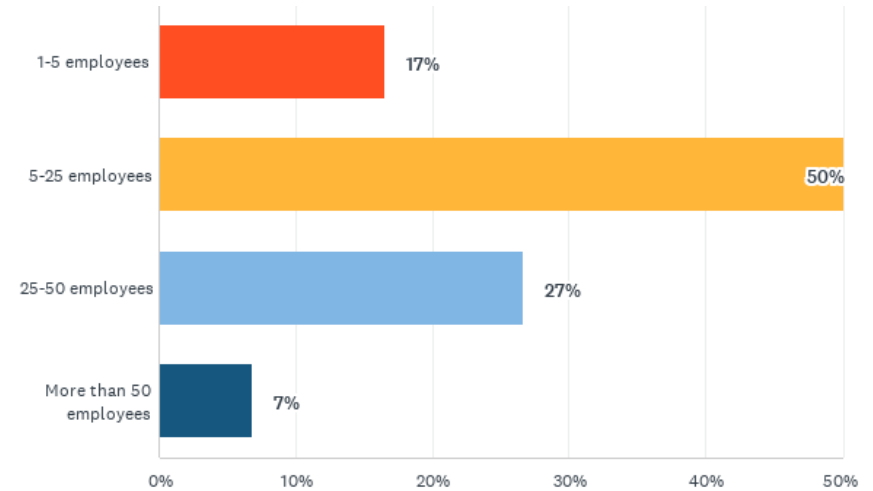
Q3: How long have you worked in this region?

Answered: 339



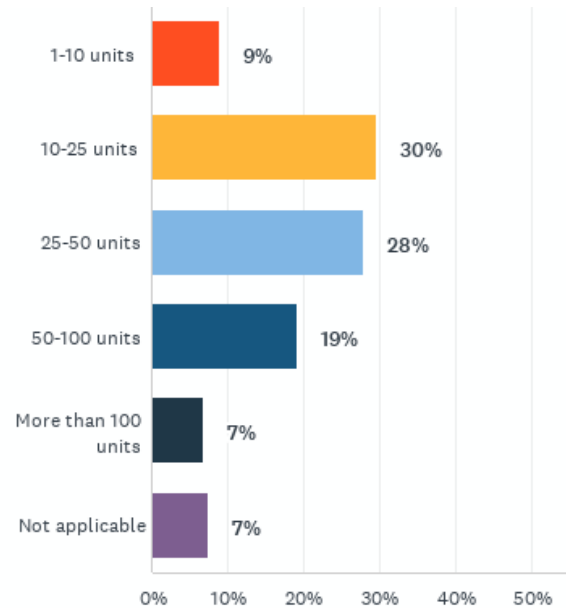
Q4: What is the size of your company?

Answered: 338



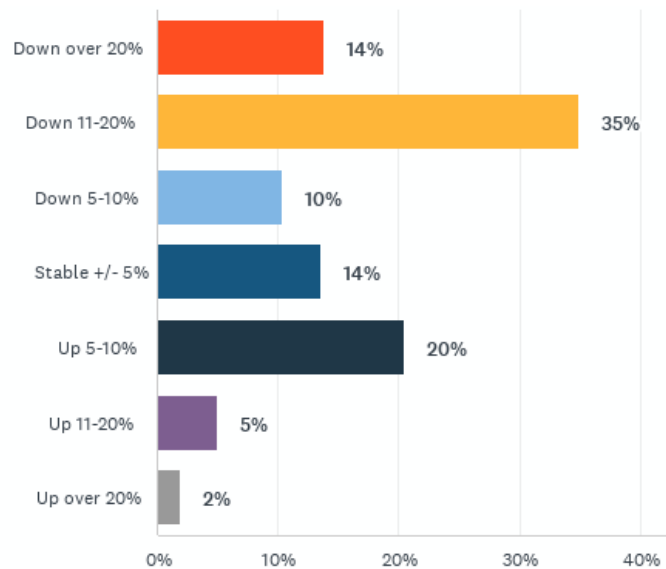
Q5: If you are a builder, how many residential units does your company build/develop per year on average? (all types of units)

Answered: 337



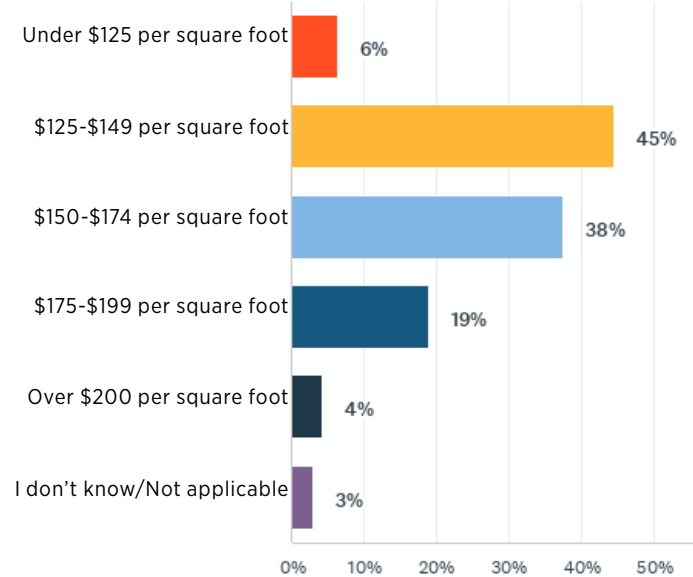
Q6: How many units did you build/develop in 2020 compared to previous years? (percentage higher or lower)

Answered: 318



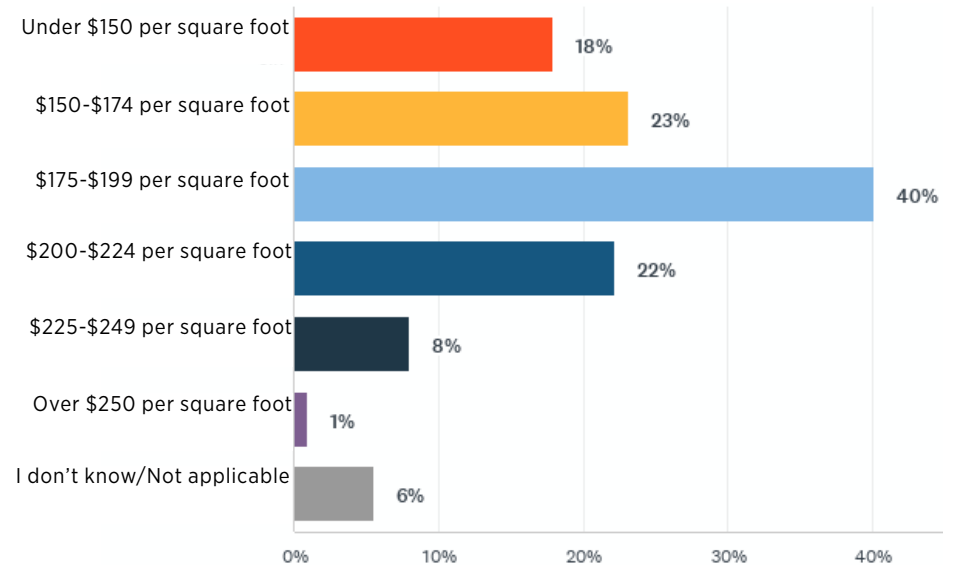
Q7: What is the average construction cost per square foot for new single-family construction?

Answered: 325

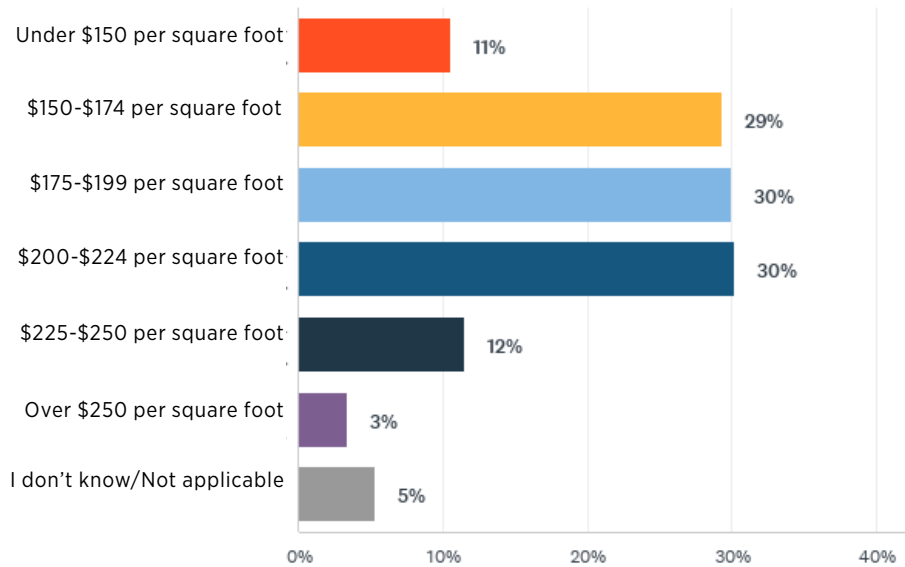


Q8: What is the average construction cost per square foot for new multi-family construction in last year's market (buildings with more than 4 units)?

Answered: 324

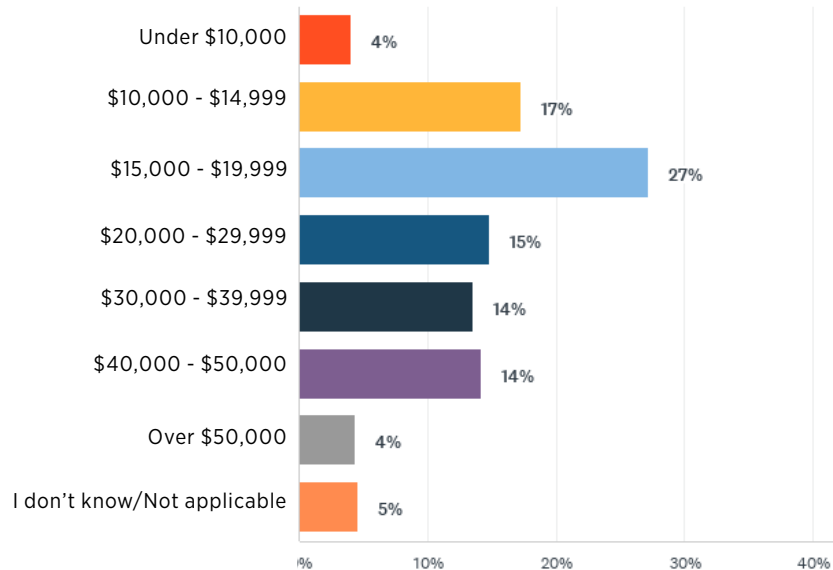


Q9: What is the average construction cost per square foot for new multi-family construction in today's market (buildings with more than 4 units)? Answered: 321



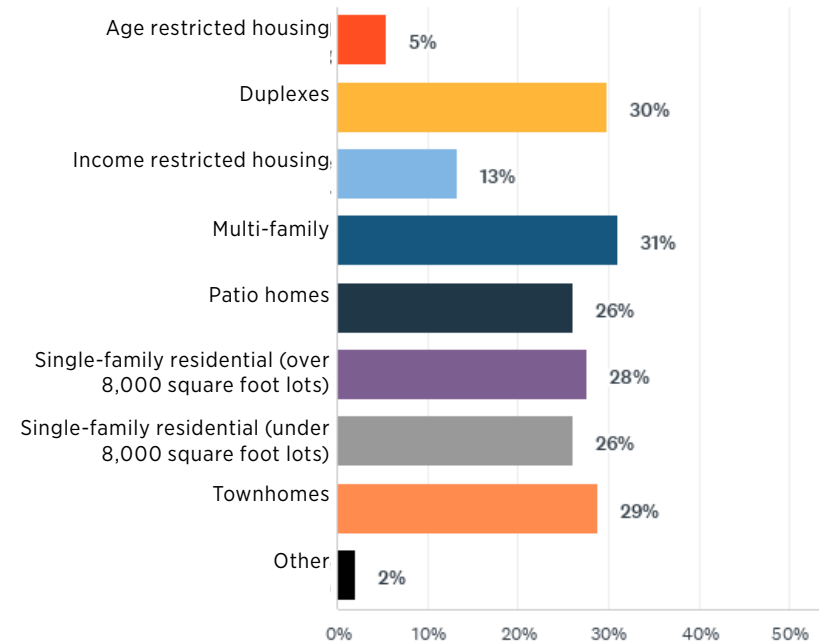
Q10: What is the average sale price of a 7,000 square foot single-family lot? (including lot cost and special assessments)

Answered: 324



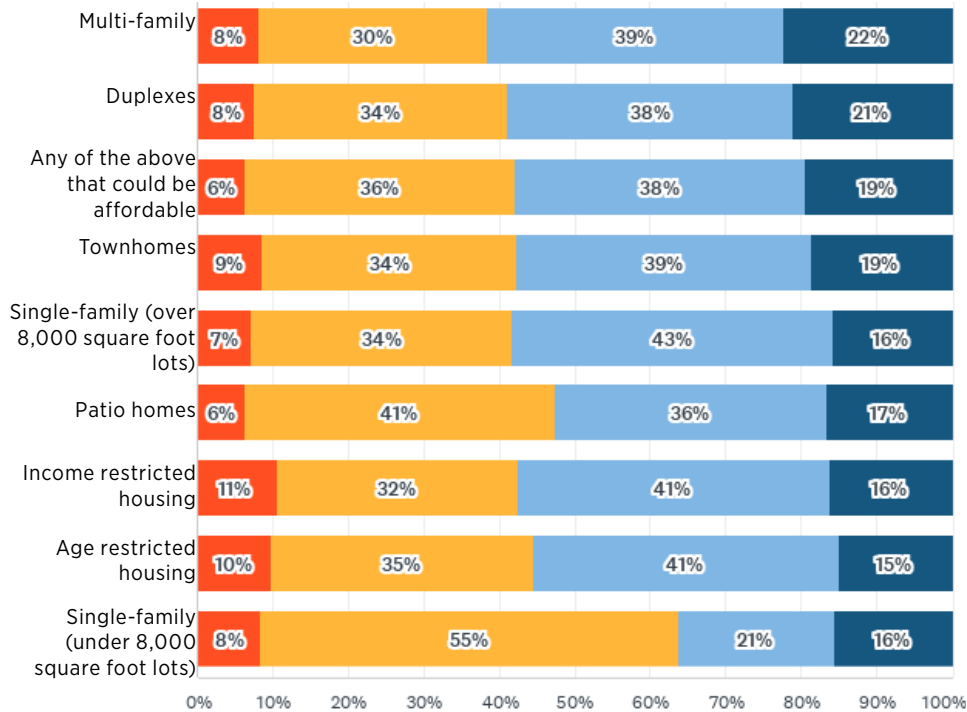
Q11: What housing type do you build/develop the most of today? (Choose up to three)

Answered: 329



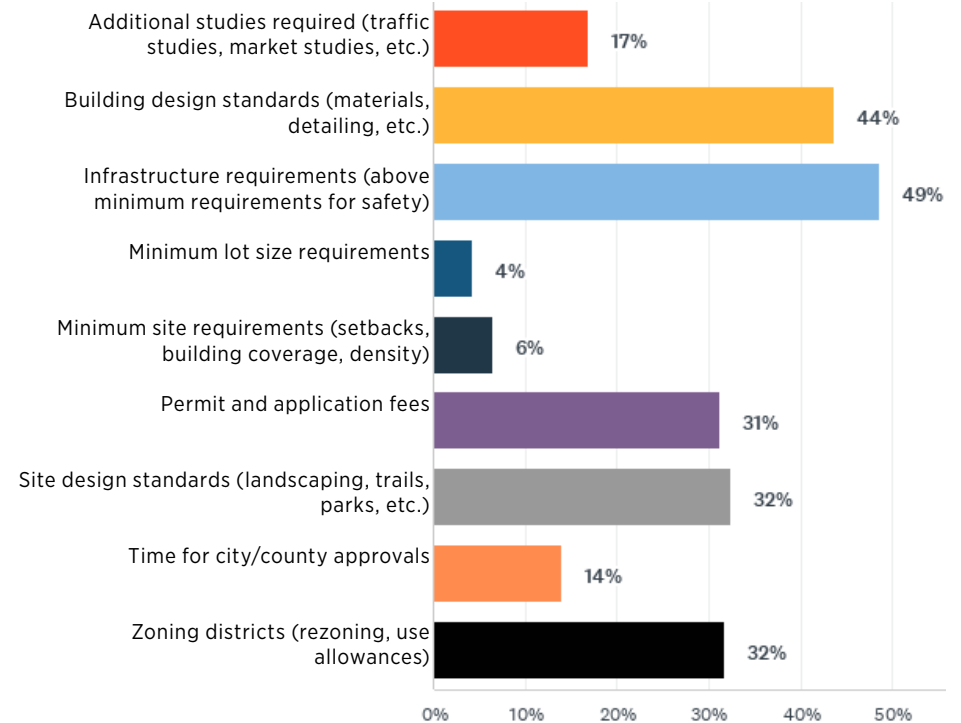
**Q12: What housing type that is not being built should be built?
(assuming costs, regulations, and other items are not an issue)**

Answered: 328



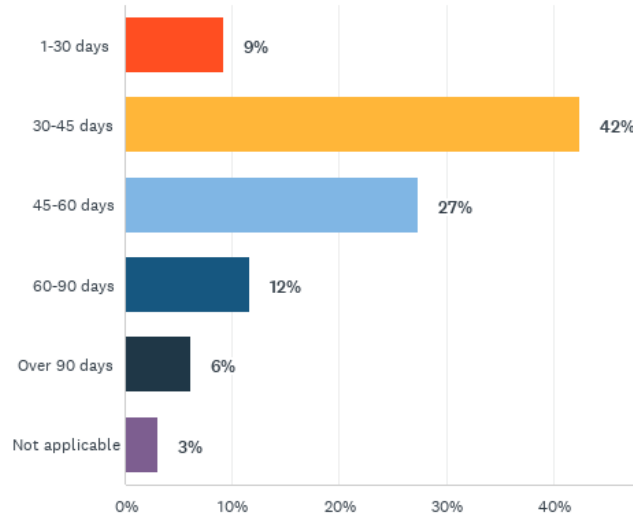
**Q13: What type of local regulations add the most to housing costs
(Choose up to three)**

Answered: 327



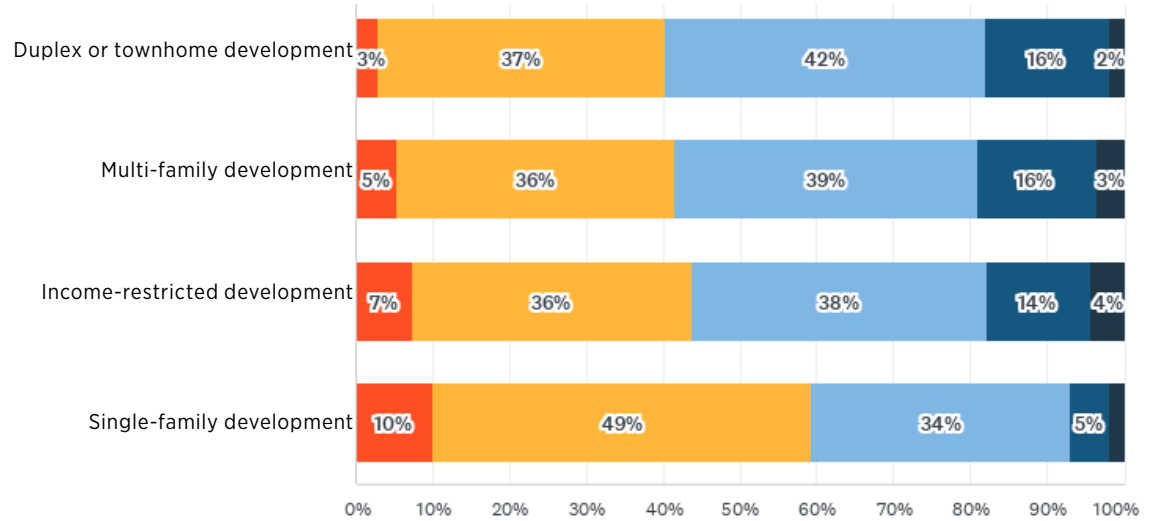
Q14: How long does it take for the local government to approve a multi-family/multi-unit site plan? (from initial meeting with the city/county)

Answered: 325



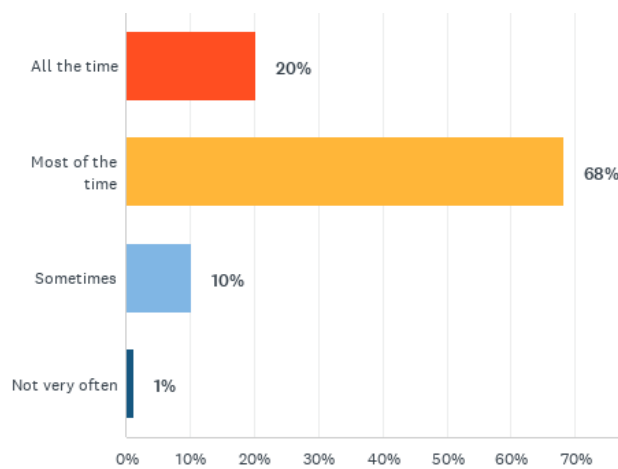
Q16: In your experience, how often are residential projects denied because of public opposition?

Answered: 326



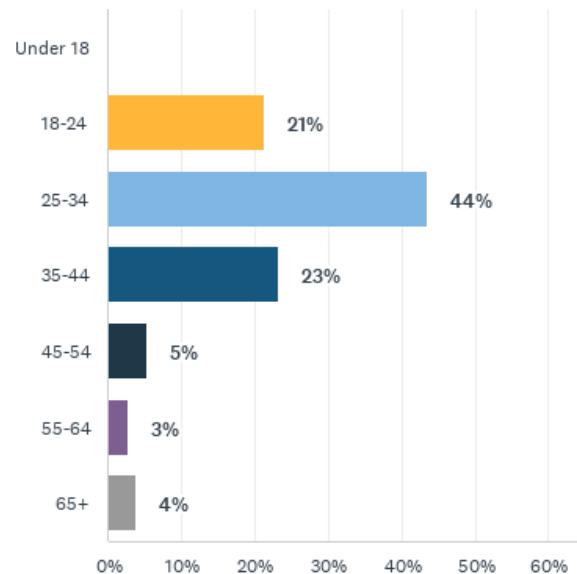
Q15: Do you feel local regulations are applied consistently based on the residential project?

Answered: 322



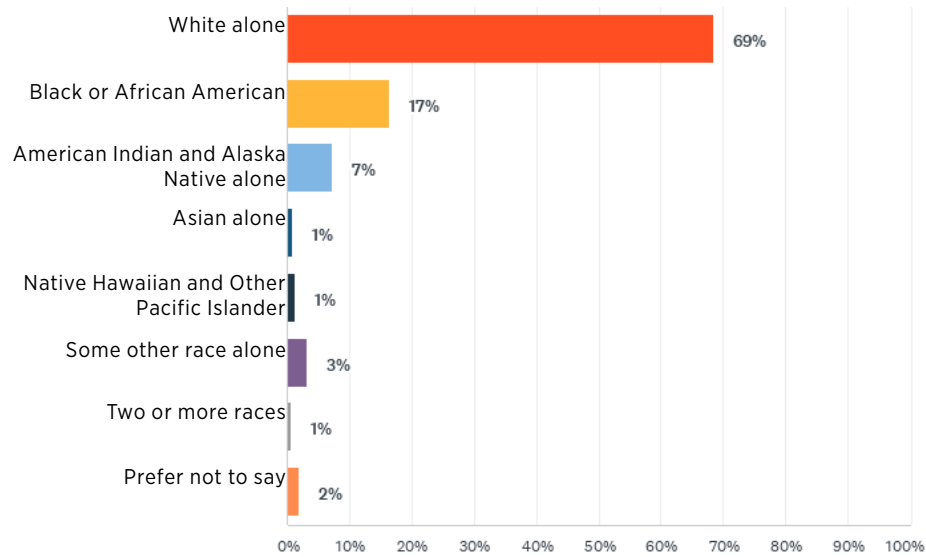
Q17: What is your age?

Answered: 319

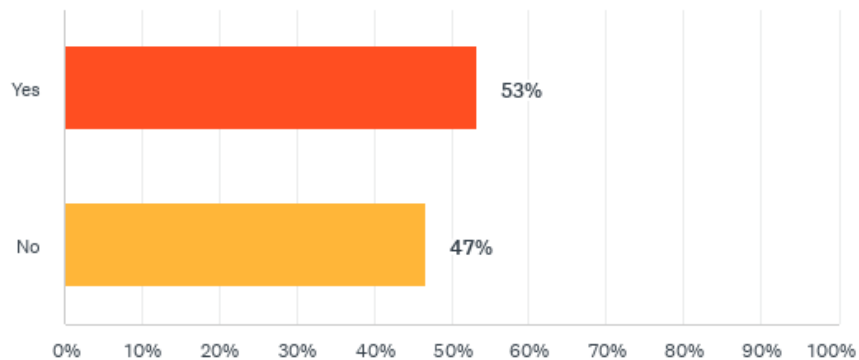


Q18: What is your race?

Answered: 321

**Q19: Are you Hispanic or Latino?**

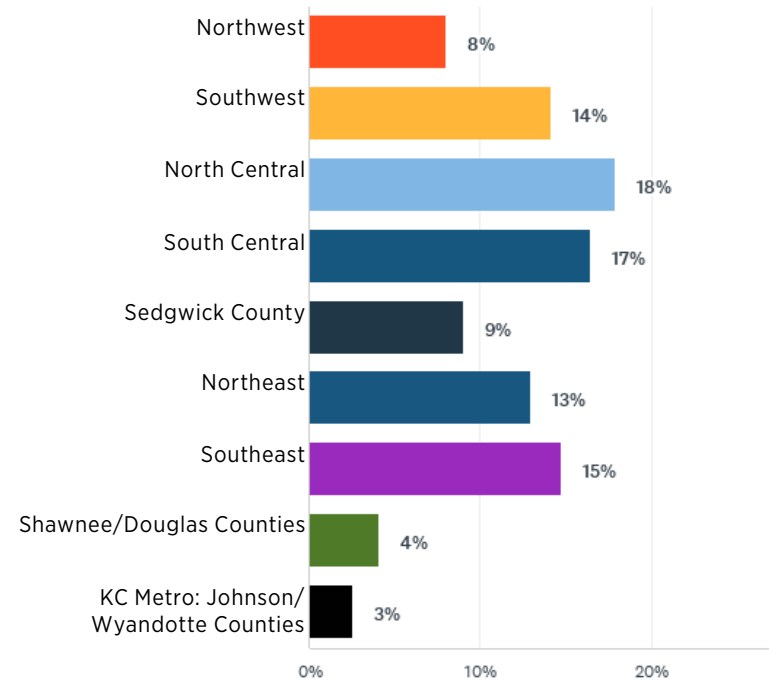
Answered: 325

**City/County Staff and Elected Officials Survey**

Total respondents: 515

Q1: What region do you represent?

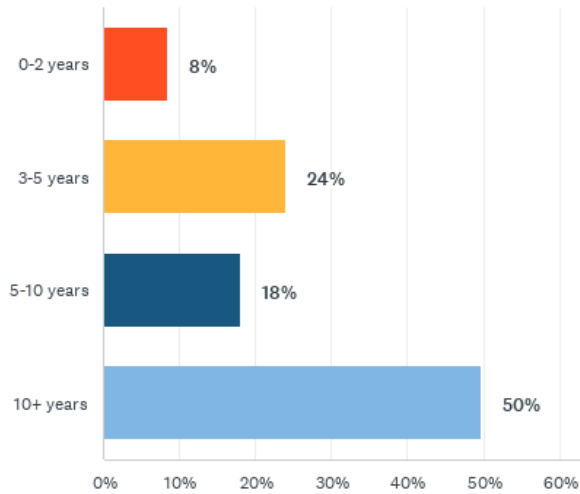
Answered: 509

**Q2: What county or counties do you represent?**

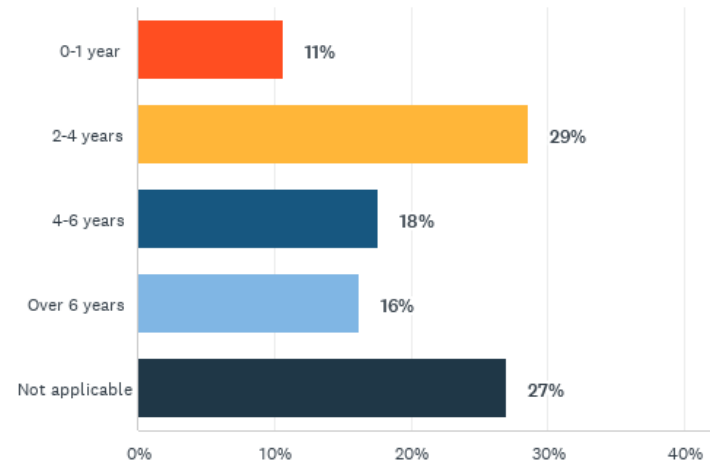
- Responses available upon request.

Q3: How long have you lived in this region?

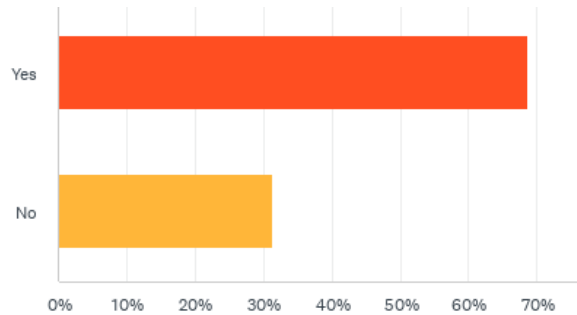
Answered: 510

**Q5: If you are an elected or appointed official, how long have you been in your position?**

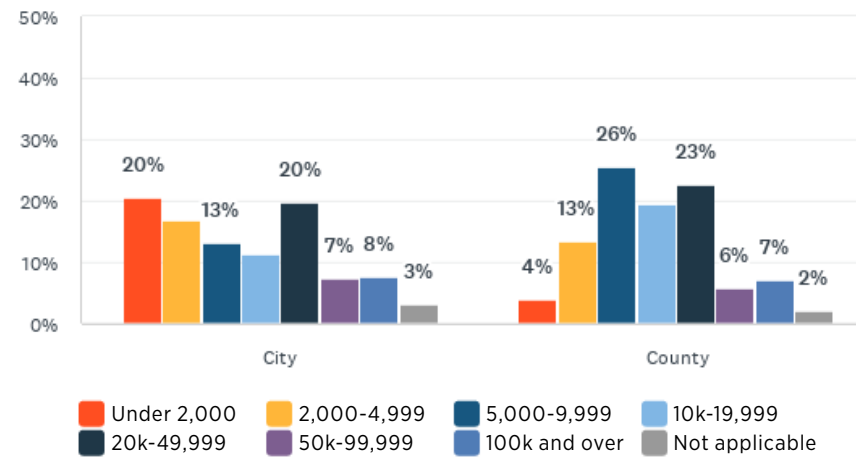
Answered: 507

**Q4: Are you an elected or appointed official?**

Answered: 509

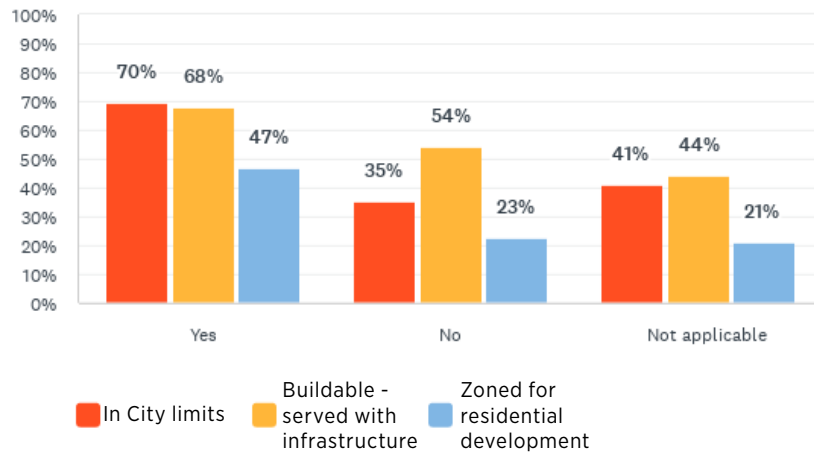
**Q6: What is the size of the city/county where you work/represent?**

Answered: 514



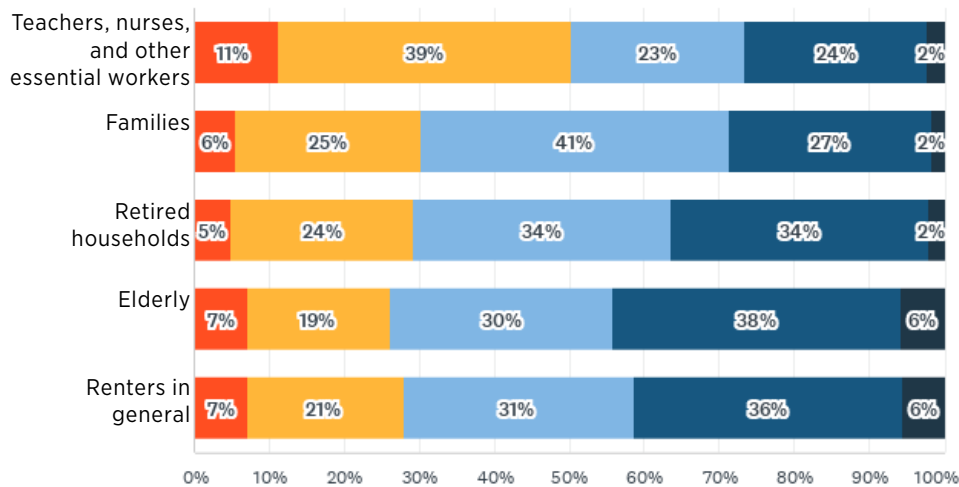
Q7: Do you have lots available for residential development in your community today?

Answered: 453



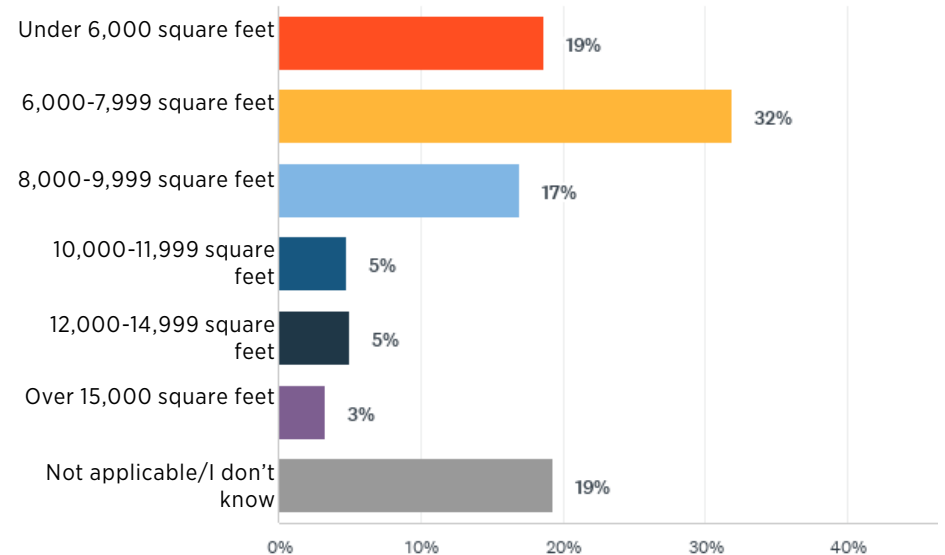
Q8: How affordable do you feel a quality housing unit is in your city/county for the following people? ("Quality housing" is generally considered a unit that is up to code with working fixtures, appliances, a maintained appearance, and free of hazardous materials)

Answered: 457



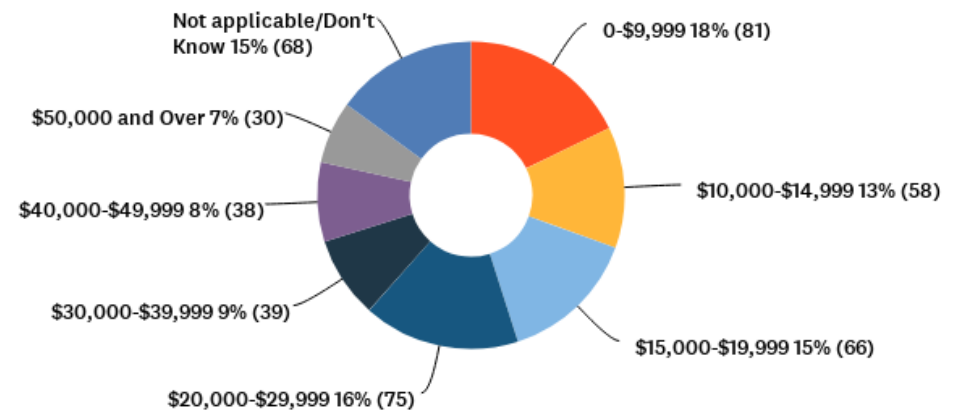
Q9: What is the typical single-family lot size in your community?

Answered: 455



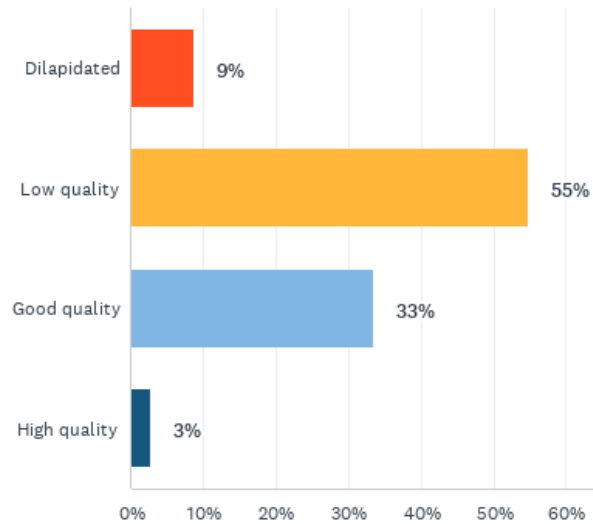
Q10: What is the average sale price of a typical single-family lot? (including lot price and special assessments)

Answered: 455



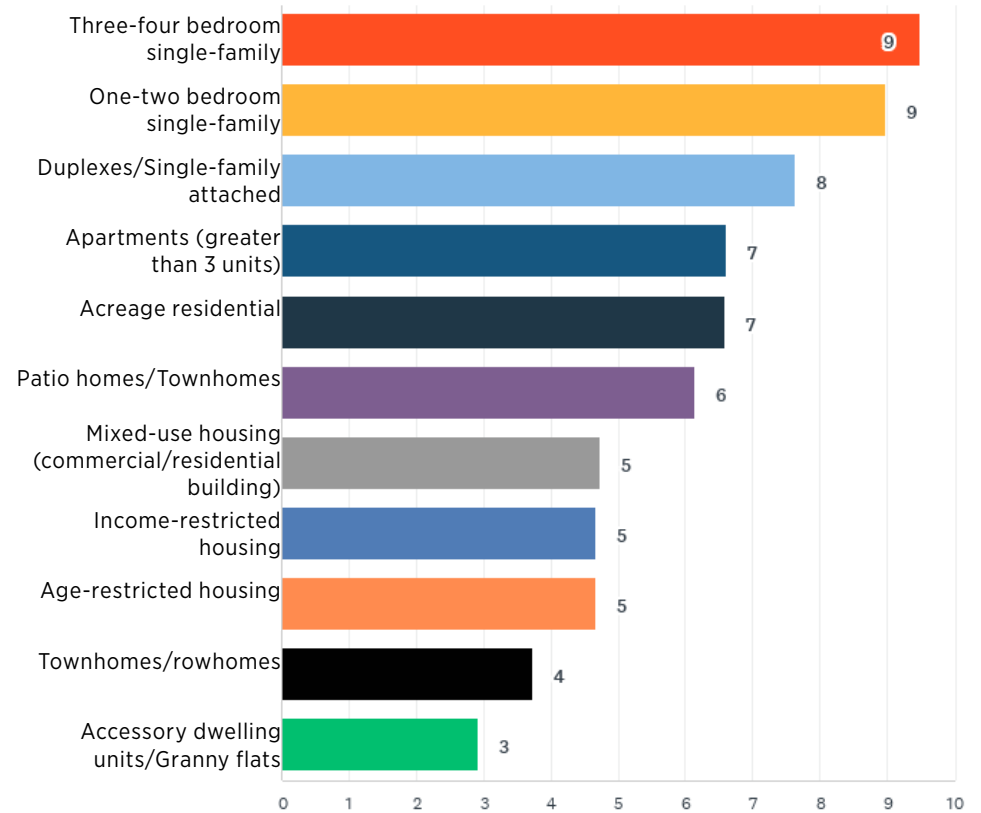
Q11: How would you rate the quality of rental units in your community/county on average?

Answered: 454



Q12: What type of housing do you feel is in most demand in your city/county? (Rank from most (1) to least (11) demand)

Answered: 444



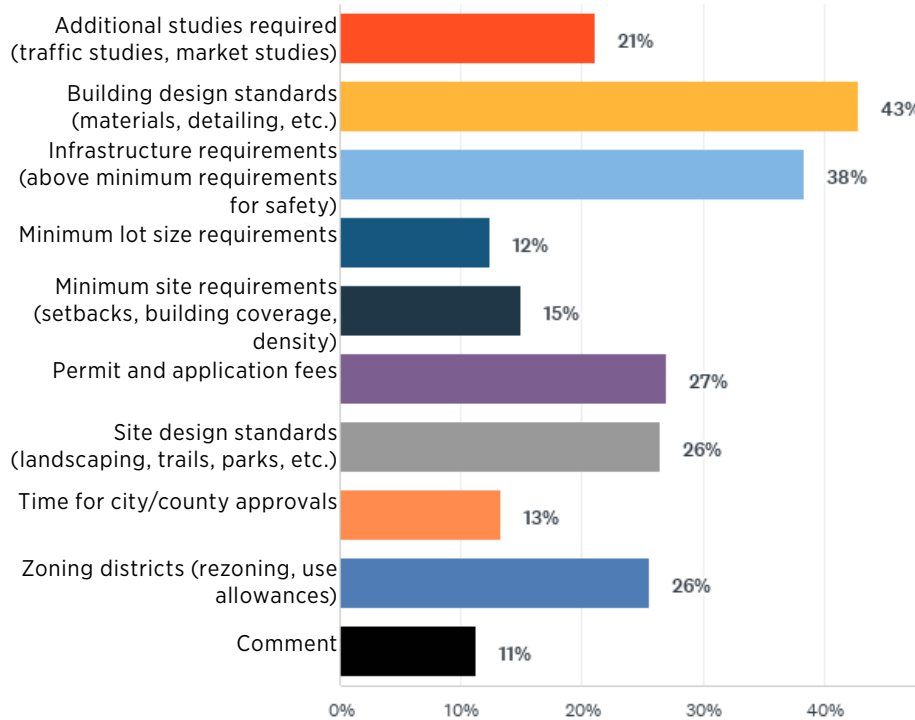
Q13: Any other housing you feel is in demand in your city/county or other comments?

Answered: 247

- Responses available upon request.

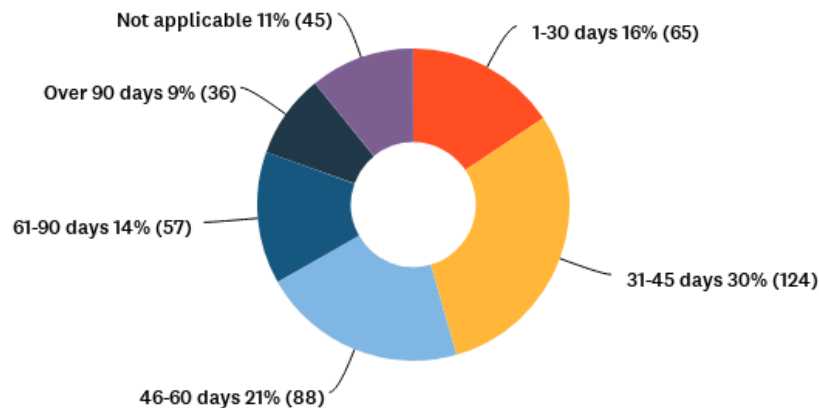
Q14: What type of local regulations do you think add the most to housing costs (Rank up to three)

Answered: 427 (comments available upon request)



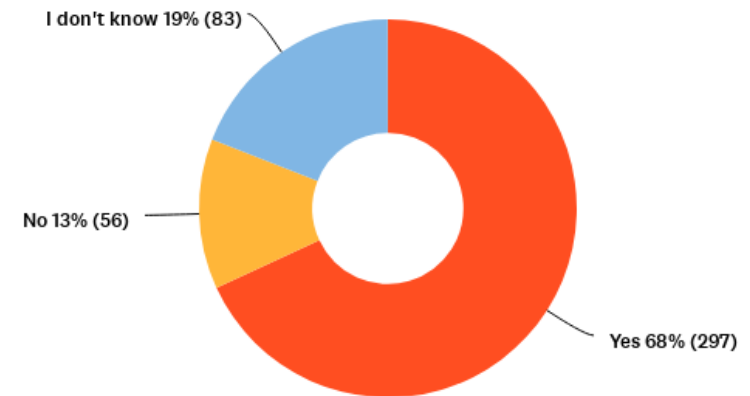
Q15: How long does it take for the local government to approve a multi-family/multi-unit site plan? (from initial meeting with developer)

Answered: 415



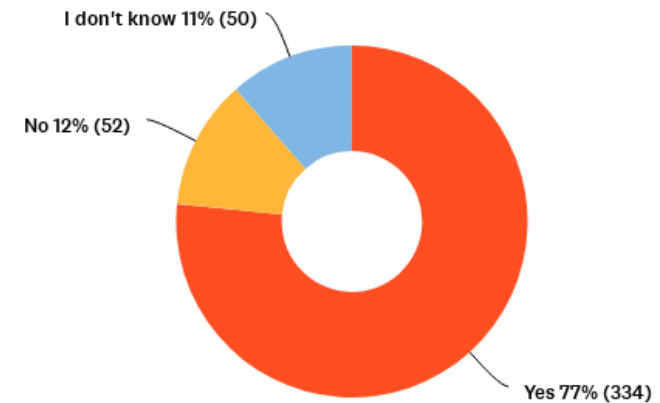
Q16: Does your city/county allow accessory dwelling units? An accessory dwelling unit is a residential dwelling unit located on the same lot as a single-family dwelling unit, either within the same building as the single-family dwelling unit or in a detached building. Such accessory unit has a separate entrance, kitchen, sleeping area, and full bathroom facilities.

Answered: 436



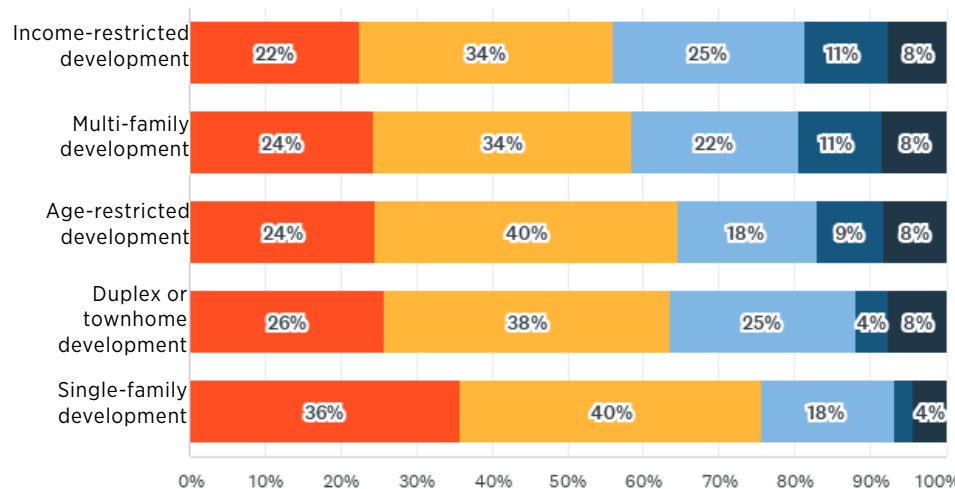
Q17: Does your city/county allow mixed-use development? Mixed-use means development in which a combination of residential and commercial uses (e.g., residential-over-retail), or several classifications of commercial uses (e.g., office and retail), are located on the same parcel proposed for development.

Answered: 436



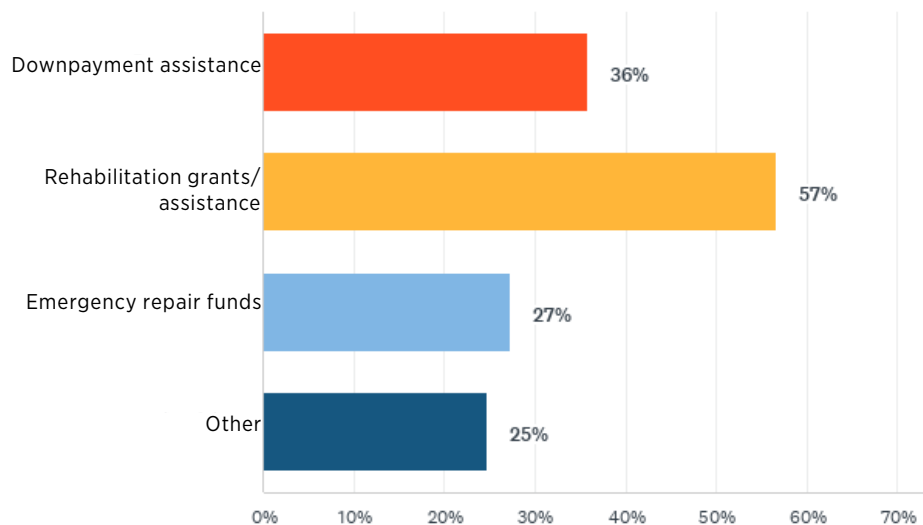
Q18: In your experience, how often are residential projects denied because of public opposition?

Answered: 434



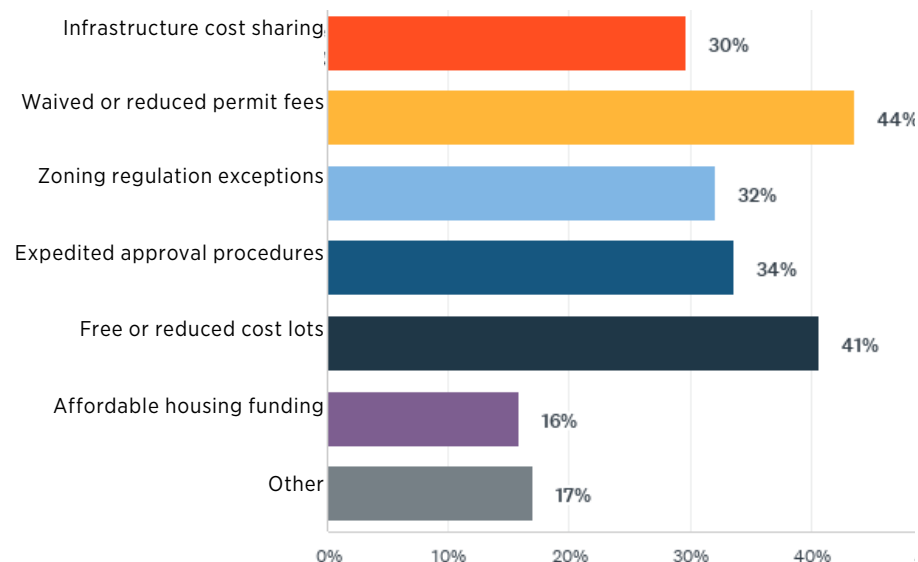
Q19: Does the city or local agencies provide any of the following housing incentives or financial assistance for residents? (select all that apply or none if none apply)

Answered: 371 ("Other" responses available upon request)

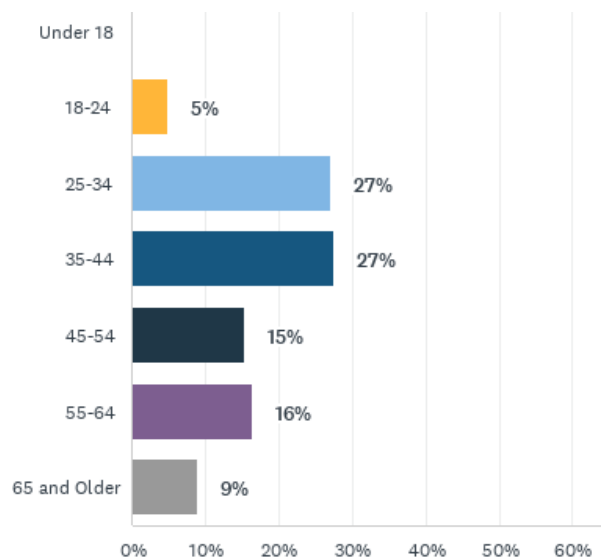


Q20: Does the city, county, or other local agency provide any of the following incentives or financial assistance for residential builders and developers? These may be tied to specific design requirements or types of residential buildings. (select all that apply or none if none apply)

Answered: 371 ("Other" responses available upon request)

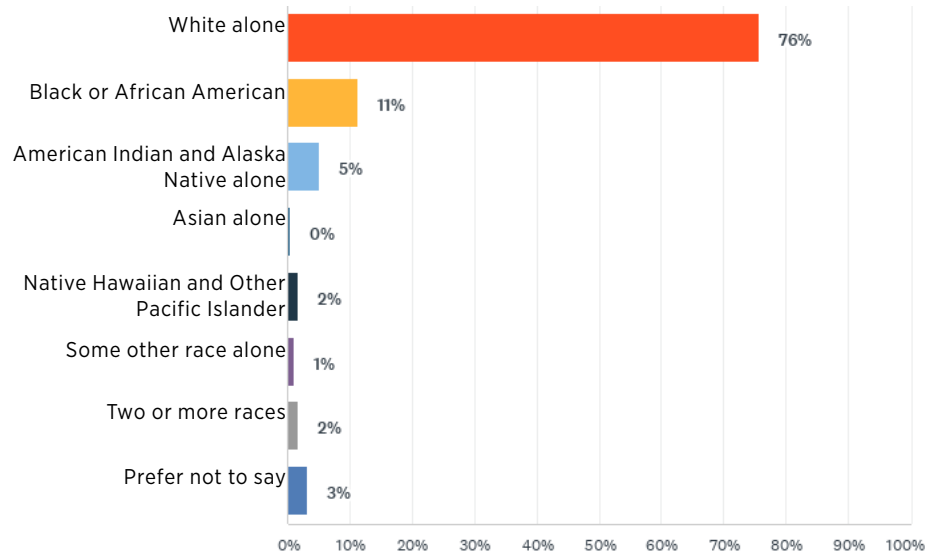


Q21: What is your age? Answered: 437

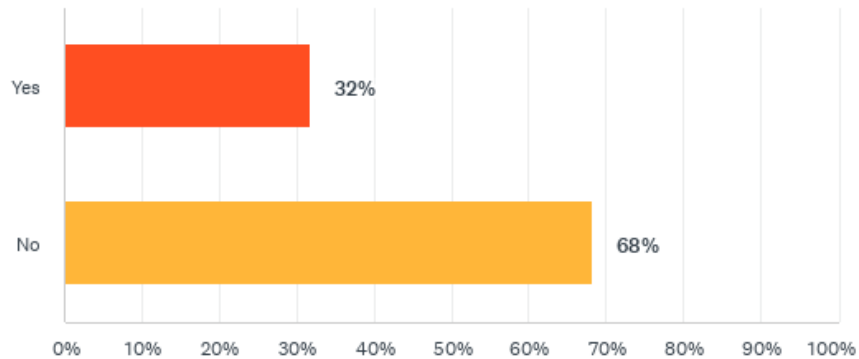


Q22: What is your race?

Answered: 436

**Q23: Are you Hispanic or Latino?**

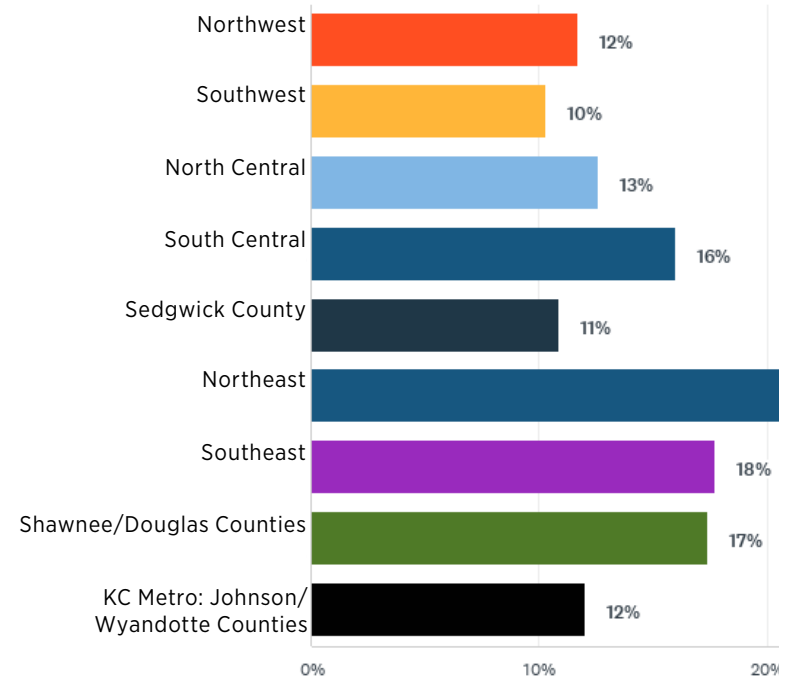
Answered: 430

**Housing Service Provider Survey**

Total respondents: 351

Q1: What region do you primarily serve?

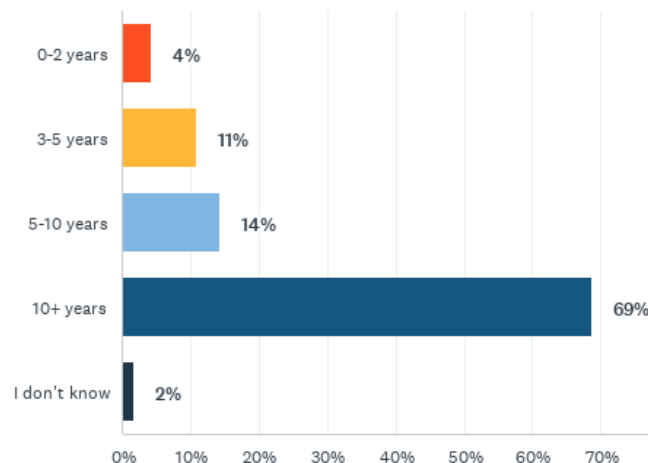
Answered: 350

**Q2: What county do you primarily serve?**

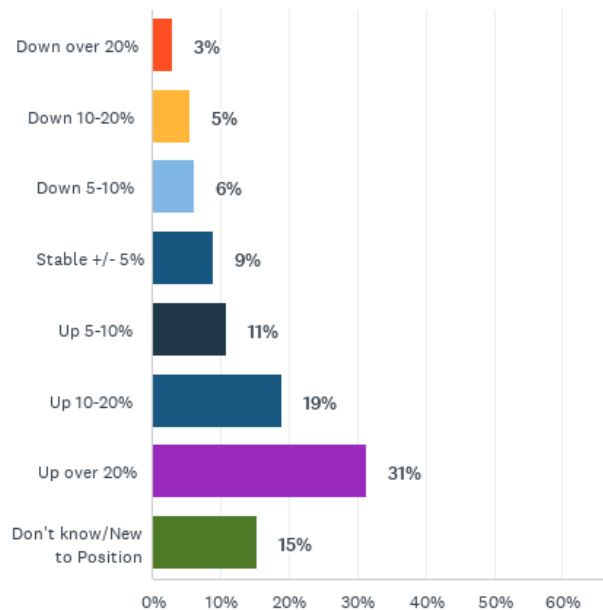
- Responses available upon request.

Q3: How long has your organization worked in this region?

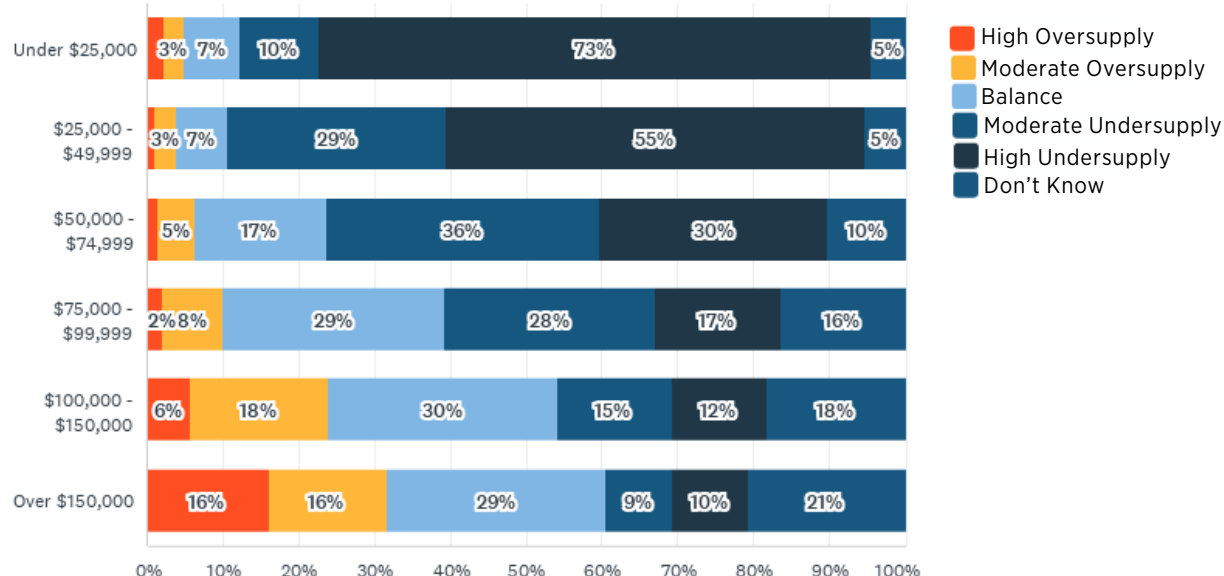
Answered: 348

**Q4: How has the demand for the services/products you provide changed in the last 5-10 years?**

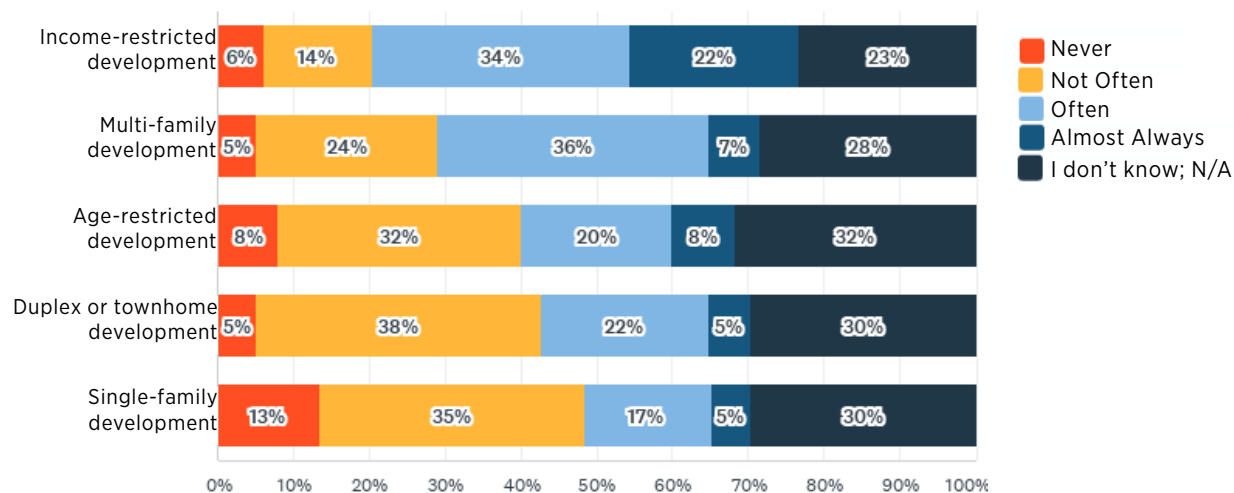
Answered: 312

**Q5: How would you rate the availability of housing for households in the following annual income ranges (owner or rental)?**

Answered: 312

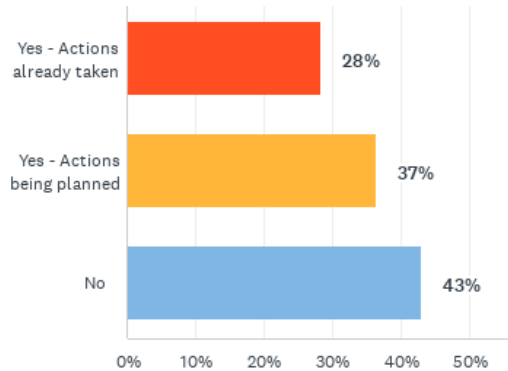
**Q6: In your experience, how often are residential projects denied because of public opposition?**

Answered: 280



Q7: Have communities in the region or county where you serve made efforts to address housing for low-income households?

Answered: 279



Q8: If you answered yes to the previous question, please describe the city and action taken.

Answered: 142

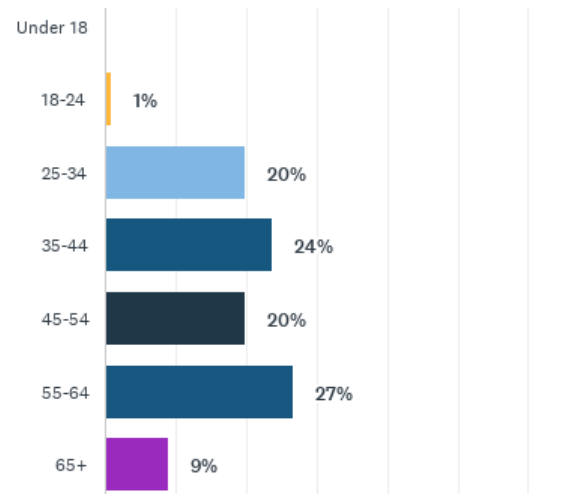
- Responses available upon request.

Q9: What types of housing assistance would be most helpful for the clients you serve? (identify up to three and please be brief)

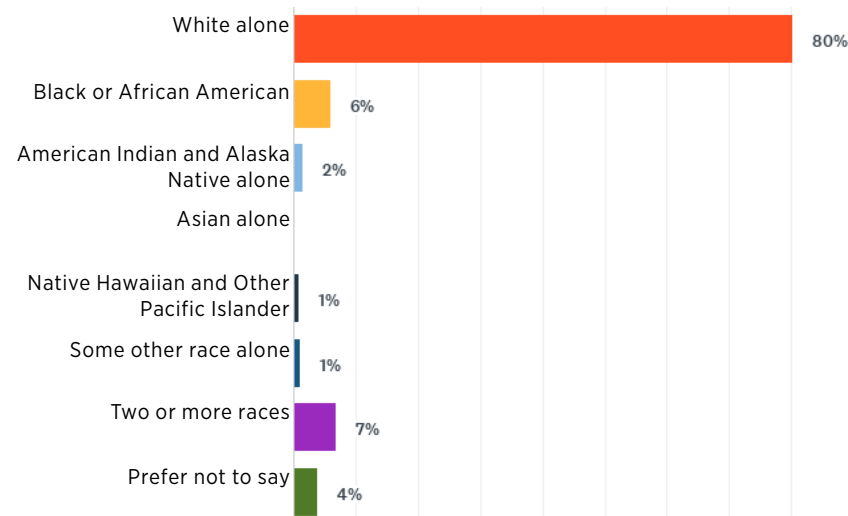
Answered: 251

- Responses available upon request.

Q10: What is your age? Answered: 266



Q11: What is your race? Answered: 266



Q12: Are you Hispanic or Latino? Answered: 265

