

Comprehensive Housing Study & Needs Assessment Dauphin County, PA

Final Report

Submitted to:

Dauphin County Redevelopment Authority

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1. Study Background

Dauphin County is located in south-central Pennsylvania and is included in the Harrisburg-Carlisle Metropolitan Statistical Area. Its strategic location has been important through its rich history. Harrisburg, the Capital City and the urban nucleus of Dauphin County, is the region's cultural, businesses and government center. Beautifully situated on the mile-wide Susquehanna River, Harrisburg merged big-city influence and sophistication with small-town friendliness and charm. The upper tier of Dauphin County provides a quiet county setting with quaint towns lying in pristine mountain valleys. The southern portion of the county is much more urbanized in and around Harrisburg and Hershey, with economic resources including Harrisburg International Airport, the New Baldwin Corridor Enterprise Zone, over 20 major industrial parks and office districts, and a highway system developed far beyond what one would expect for an area of this size, as well as a main line Amtrak passenger service and an intermodal terminus for double stack rail freight.

As part of an on-going effort to promote a healthy and balanced housing market in the county, this report was commissioned to help decision makers, stakeholders and community members develop a meaningful sense of housing markets, an understanding of key housing issues and identification of new strategies as well as strategies utilized elsewhere to address the county's housing needs. The study provides a measured assessment of present and future unmet housing demand, focusing on a deeper understanding of short-to-mid-term housing demand (5 to 15 years).

Figure 1: Historic Rowhomes in the Shipoke Neighborhood, City of Harrisburg



Photo Credit: Realtor.com

Glossary of Housing Terms

The following are housing terms used throughout this document.

- **Affordable:** housing is generally considered affordable if the occupant is paying no more than 30 percent of gross income for housing costs, including utilities.
- **American Community Survey (ACS):** a national survey by the U.S. Census Bureau that collects information such as age, race, income, commute time to work, home value, veteran status and other important household data. It is collected more regularly than the Decennial Census but has a larger margin of error because it's derived from a smaller sample.
- **Cost burden:** policymakers and advocates consider a household “cost burdened” if more than 30% of their income goes towards housing costs. Being housing cost burdened is an indicator that a household may be unable to afford other critical and nondiscretionary costs such as health and childcare, education, food, and transportation.
- **Decennial Census:** undertaken by the U.S. Census Bureau every ten years ending in zero. It provides a count of the population and housing units for the entire United States. Its primary purpose is to provide the population counts that determine how seats in the U.S. House of Representatives are apportioned between the states.
- **Group Quarters:** places where people live or stay in a group living arrangement. Examples include group homes, nursing homes, university student housing (e.g., residence halls, fraternity/sorority houses), and correctional facilities.
- **Household:** all the people who occupy a housing unit. A household includes the related family members and all the unrelated people. A person living alone in a housing unit, or a group of unrelated people sharing a housing unit such as partners or roomers, is also counted as a household.
- **HUD:** the [Department of Housing and Urban Development](#) (HUD) is a cabinet department in the executive branch of the U.S. federal government that supports community development and homeownership. HUD enforces the Fair Housing Act and offers housing assistance through the Community Development Block Grant, Housing Choice Voucher program, and other programs.
- **Housing Subsidy:** policy tool designed to make the cost of housing affordable to low-income households. The most common housing subsidies include the [Low-Income Housing Tax Credit](#), [Housing Choice Vouchers](#) (also known as Section 8 Vouchers), and [HUD Section 202 Supportive Housing for the Elderly](#). Developments that utilize these subsidies are required to rent to low-income households (usually below 50% or 60% of the AMI).
- **Pennsylvania Housing Finance Agency:** [PHFA](#) is the state housing agency that administers and allocates various state and federal housing assistance programs, such as the Low Income Housing Tax Credits.
- **Market-Rate Housing:** homes offered at the prevailing cost (rent or sale price) for the local market. It is set by the landlord/seller without restrictions.

- **Workforce Housing:** the Urban Land Institute defines it as housing affordable to households earning between 60 and 120 percent of area median income (AMI). Workforce housing targets middle-income workers which include professions such as police officers, firefighters, teachers, health care workers, retail clerks, and the like (Matthew J. Parlow, 2015).
- **Zoning:** a planning control tool for regulating the built environment and creating functional real estate markets. It does so by dividing land that comprises the statutory area of a local authority into sections, permitting particular land uses on specific sites to shape the layout of towns and cities and enable various types of development. The purpose of zoning is to allow local and national authorities to regulate and control land and property markets to ensure complementary uses (The World Bank).

Area Median Income (AMI)

The AMI is the estimated median income, adjusted for family size, by metropolitan area. AMI is updated annually by HUD and used as the basis of eligibility for most housing assistance programs. For income-restricted rental communities that are subsidized by Low Income Housing Tax Credits and other government subsidies, the income cut-off is generally 50% or 60% of the AMI. The following table shows the 2021 AMI for the Harrisburg-Carlisle MSA:

	1 person	2 person	3 person	4 person	5 person	6 person	7 person	8 person
Median Income 100% of AMI	\$59,500	\$68,000	\$76,500	\$84,900	\$91,700	\$98,500	\$105,300	\$112,100
Low Income 80% of AMI	\$47,550	\$54,350	\$61,150	\$67,900	\$73,350	\$78,800	\$84,200	\$89,650
60% of AMI	\$35,700	40,800	\$45,900	\$50,940	\$55,020	\$59,100	\$63,180	\$67,260
Very Low Income 50% of AMI	\$29,750	34,000	\$38,250	\$42,450	\$45,850	\$49,250	\$52,650	\$56,050
30% of AMI	\$17,850	\$20,400	\$22,950	\$25,450	\$27,500	\$29,550	\$31,600	\$33,600
Max Housing Costs for 80% AMI								
Max Annual Housing Cost	\$14,265	\$16,305	\$18,345	\$20,370	\$22,005	\$23,640	\$25,260	\$26,895
Max Monthly Rent/Mortgage	\$1,189	\$1,359	\$1,529	\$1,698	\$1,834	\$1,970	\$2,105	\$2,241
Max Mortgage Amount**	\$226,884	\$259,330	\$291,776	\$323,983	\$349,988	\$375,992	\$401,758	\$427,763

** at current 30-year mortgage interest rates (4.2%), \$3,000 in property tax annually and \$500 hazard insurance. Downpayment not factored.

Residential Housing Types

The following residential housing types are discussed throughout the report. Each of the housing types can be offered to the public as for-sale and/or for-rent products.



Single Family Detached



Duplex - Stacked



Triplex - Stacked



Patio Homes



Cottage Home



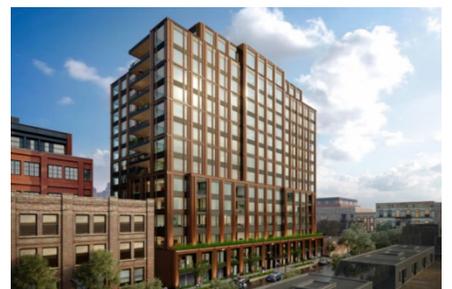
Townhouse



Live-Work



Mid-Rise



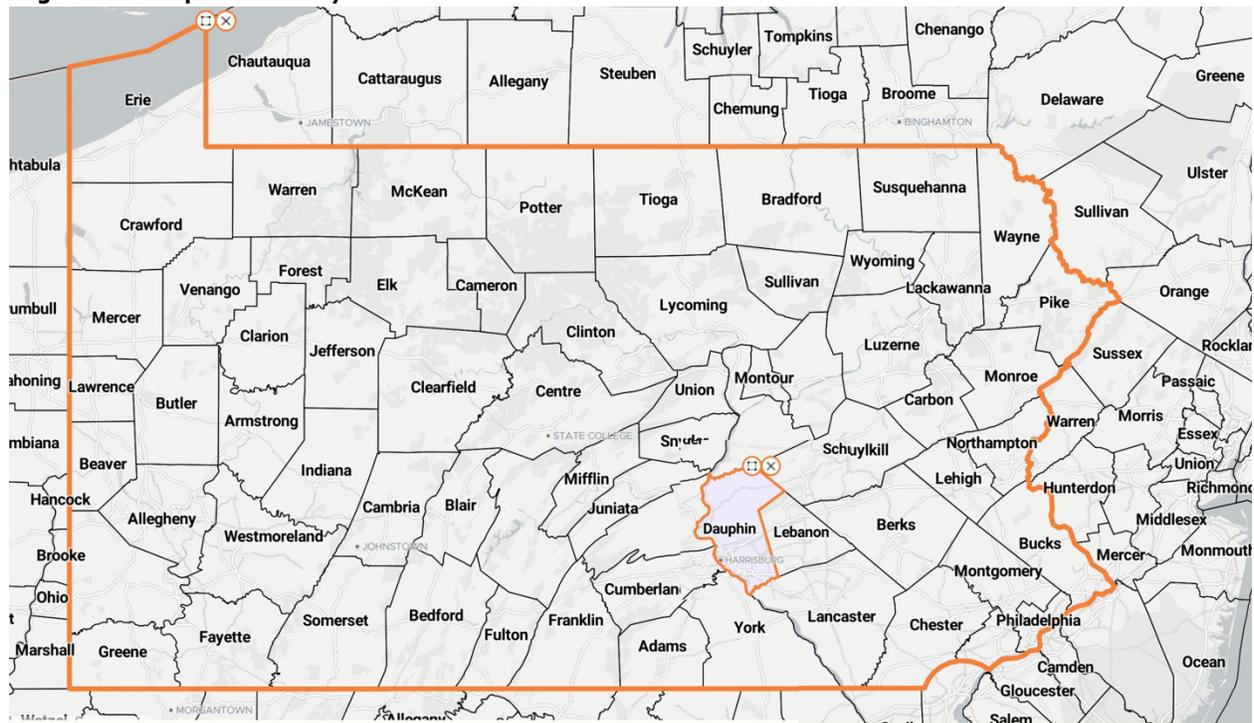
High-Rise

2. Demographic Trends

The appropriate starting point for a housing market analysis is an examination of key demographic trends to identify the composition of the market’s residents in addition to its housing stock. Specific elements of these trends include population and household characteristics, and income and poverty characteristics. Detailed analyses of the housing stock and housing market conditions will be discussed in subsequent sections of this study.

The primary data sources for the demographic analysis are the U.S. Census Bureau’s Decennial Census, providing actual counts for the year 2010, and the American Community Survey, providing data based on calculated estimates for 2019—the latest year for which detailed demographic data is available.

Figure 2: Dauphin County Location



Population and Household Characteristics

The 2019 American Community Survey 5-Year Estimates (ACS) reported a total population of 275,632 for Dauphin County, an increase of 10,809 residents or 4.1% from 2010¹. In comparison, the state added 178,825 residents from 2010 to 2019 (1.4% growth. See Table 1 shown on the following page).

¹ The U.S. Census Bureau’s 2020 Redistricting Dataset reported total populations of 286,401 for Dauphin County and 13,002,700 for the State of Pennsylvania. As of this report, detailed demographic data from the U.S. Census Bureau were not available beyond 2019.

Table 1: Population Trends, 2010-2019

	2010 ACS	2019 ACS	Change (2010-2019)	% Change (2010-2019)
Dauphin County	264,823	275,632	10,809	4.1%
State of Pennsylvania	12,612,705	12,791,530	178,825	1.4%

Source: U.S. Census Bureau, Urban Partners

As shown on Table 2 below, Dauphin County’s household growth trend was similar to the population growth from 2010 to 2019. The total number of households increased by 4.1% during this period, adding 4,404 net new households. The growth of households for the State of Pennsylvania outpaced the population growth—2.3% increase compared to 1.4% population growth rate as shown in Table 1.

Table 2: Household Trends, 2010-2019

	2010 ACS	2019 ACS	Change (2010-2019)	% Change (2010-2019)
Dauphin County	107,808	112,212	4,404	4.1%
State of Pennsylvania	4,940,581	5,053,106	112,525	2.3%

Source: U.S. Census Bureau, Urban Partners

Dauphin County reported 2.6% of its residents living in non-household group quarters in 2019, notably lower than the state average of 3.3% (see Table 3)². 62.0% of all households in Dauphin County are family households, compared to 64.0% for the State of Pennsylvania.

Table 3: Household Type by Relationship, 2019

	Dauphin County	State of Pennsylvania
Total Population	275,632	12,791,530
In Households	268,560	12,367,989
In Households (% of Total Population)	97.4%	96.7%
In Family Households (% of Households)	62.0%	64.0%
In Non-Family Households (% of Households)	38.0%	36.0%
In Group Quarters (% of Total Population)	2.6%	3.3%

Source: U.S. Census Bureau, Urban Partners

Dauphin County reported an overall decrease in average household size from 2010 to 2019, declining from 2.42 to 2.39. Similarly, the State of Pennsylvania also experienced a reduction, declining from 2.47 persons per household in 2010 to 2.45 in 2019. However, bucking the overall trend of decreasing household sizes, the average household size for Dauphin County’s renter-occupied households increased from 2.20 in 2010 to 2.26 in 2019 (see Table 4).

² The Census Bureau classifies all people not living in housing units (house, apartment, mobile home, rented rooms) as living in Group Quarters, of which there are two types: 1) Institutional, such as correctional facilities, nursing homes, or mental hospitals; and 2) Non-Institutional, such as college dormitories, military barracks, group homes, missions, or shelters.

Table 4: Average Household Size, 2010-2019

	2010 ACS	2019 ACS	% Change (2010-2019)
Dauphin County			
All Households	2.42	2.39	-1.2%
Owner Households	2.53	2.47	-2.4%
Renter Households	2.20	2.26	2.7%
Pennsylvania			
All Households	2.47	2.45	-0.8%
Owner Households	2.60	2.56	-1.5%
Renter Households	2.15	2.20	2.3%

Source: U.S. Census Bureau, Urban Partners

The ethnic/racial composition of Dauphin County is majority White, though the county is growing increasingly more diverse. In 2019, 65.8% of Dauphin County residents were White, followed by 18.0% Black or African American, 9.2% Hispanic, 4.4% Asian American, and 2.5% American Indian/Some Other Race Alone/Two or More Races. From 2010 to 2019, the percentage of non-White residents increased from 29.1% to 34.2%. Compared to the State of Pennsylvania, Dauphin County continues to maintain a more racially/ethnically diverse population (see Table 5).

Table 5: Ethnic/Racial Composition, 2010-2019

	Dauphin County		Pennsylvania	
	2010 ACS	2019 ACS	2010 ACS	2019 ACS
White Alone	70.9%	65.8%	80.3%	76.4%
Black or African American Alone	17.2%	18.0%	10.4%	10.7%
American Indian and Alaska Native Alone	0.0%	0.1%	0.0%	0.1%
Asian American Alone	3.0%	4.4%	2.6%	3.4%
Native Hawaiian & other Pacific Islander Alone	0.0%	0.0%	0.0%	0.0%
Some other Race Alone	0.3%	0.1%	0.2%	0.2%
Two or More Races	2.2%	2.3%	1.2%	1.9%
Hispanic (All Races)	6.4%	9.2%	5.2%	7.3%

Source: U.S. Census Bureau, Urban Partners

Dauphin County has a lower educational attainment level of residents over the age of 25 than the state. 30.8% of the residents aged 25 and above in the county have bachelor's degrees or higher as the highest educational attainment, compared to 31.4% for the state. The percentage of residents with graduate/professional degrees increased by 1.5% in Dauphin County from 2010 to 2019, while it increased by 2.3% in the state (see Table 6 on the following page).

Table 6: Educational Attainment for Population 25 Years and Over, 2010-2019

	Dauphin County		Pennsylvania	
	2010 ACS	2019 ACS	2010 ACS	2019 ACS
Less Than 9th Grade	3.2%	3.7%	4.0%	3.2%
9th to 12th Grade, No Diploma	8.3%	6.5%	8.6%	6.3%
High School Graduate (Includes Equivalency)	37.1%	33.2%	37.8%	34.7%
Some College, No Degree	16.7%	16.4%	15.9%	15.9%
Associate's Degree	7.6%	9.4%	7.3%	8.5%
Bachelor's Degree	17.0%	19.2%	16.3%	19.0%
Graduate or Professional Degree	10.1%	11.6%	10.1%	12.4%

Source: U.S. Census Bureau, Urban Partners

The age distribution patterns of Dauphin County resemble those at the state level with slight variations. As organized in Table 7 below, the largest age cohort in 2019 in Dauphin County is school-aged children (5 to 17 years old) at 16.3%, followed by middle-aged adults aged 55 to 64 at 14.0%. For both the county and the state, seniors 65 years-of-age and older grew rapidly. In 2019, the 65+ population in Dauphin County made up 16.6% of the population, up from 13.7% in 2010.

Table 7: Distribution of Age, 2010-2019

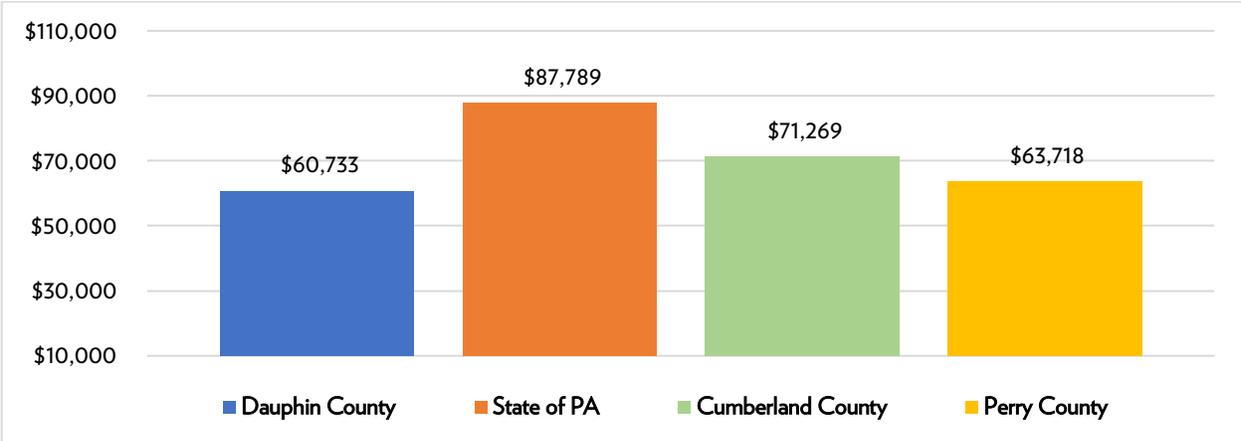
	Dauphin County		Pennsylvania	
	2010 ACS	2019 ACS	2010 ACS	2019 ACS
Under 5 Years-of-Age	6.2%	6.2%	5.8%	5.5%
5 To 17 Years-of-Age	17.1%	16.3%	16.6%	15.3%
18 To 24 Years-of-Age	8.5%	8.2%	9.8%	9.2%
25 To 34 Years-of-Age	12.8%	13.8%	11.8%	13.1%
35 To 44 Years-of-Age	13.6%	11.7%	13.4%	11.7%
45 To 54 Years-of-Age	15.7%	13.3%	15.3%	13.2%
55 To 64 Years-of-Age	12.4%	14.0%	12.1%	14.1%
65 To 74 Years-of-Age	6.9%	9.7%	7.5%	10.0%
75 To 84 Years-of-Age	4.9%	4.7%	5.5%	5.3%
85 Years-of-Age & Over	1.9%	2.2%	2.3%	2.5%

Source: U.S. Census Bureau, Urban Partners

Household Income & Poverty Characteristics

As shown in Figure 3, Dauphin County’s median household income of \$60,733 is notably lower than the \$87,789 reported for the State of Pennsylvania. As a further comparison, the median household income for other counties within the Tri-County Regional Planning Area are \$71,269 for Cumberland County and \$63,718 for Perry County.

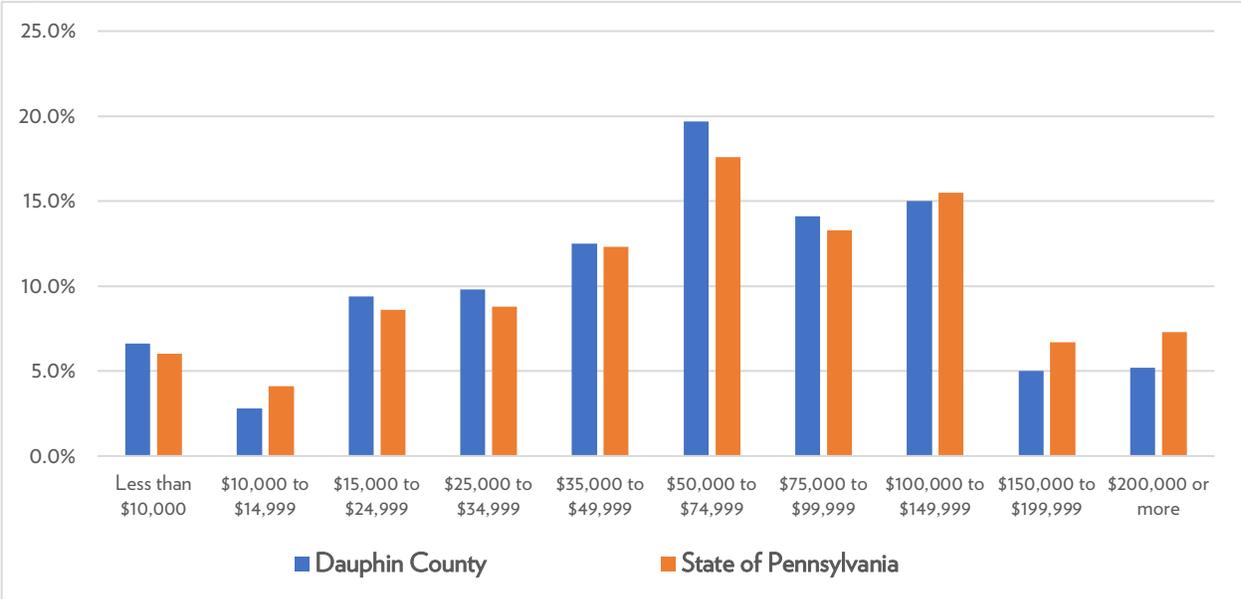
Figure 3: Median Household Income, 2019



Source: U.S. Census Bureau, Urban Partners

In Dauphin County, 18.8% of the households earn less than \$25,000 annually, compared to 18.7% in the State of Pennsylvania. Just over a quarter (25.2%) of all Dauphin County households earn more than \$100,000 annually, compared to 29.5% for the county and 27.9% for the State of Pennsylvania (see Figure 4).

Figure 4: Distribution of Median Household Income, 2019



Source: U.S. Census Bureau, Urban Partners

According to the 2019 ACS, 33,354 Dauphin County residents (or 12.3%) are living below the poverty level, compared to the State of Pennsylvania’s poverty rate of 12.4% (see Table 8).

Table 8: Population Living Below Poverty Level, 2019

	Dauphin County	State of Pennsylvania
Population Below Living Poverty Level	33,354	1,539,183
Population Below Living Poverty Level (%)	12.3%	12.4%

Source: U.S. Census Bureau, Urban Partners

According to the 2019 ACS, 19.2% of owner-occupant households in Dauphin County pay more than 30% of their income toward housing costs (and thus are “cost-burdened”), and 41.5% of renter households are cost burdened (see Table 9).

Table 9: Tenure by Housing Costs – Dauphin County, 2019

	Owner Occupants		Renter Occupants	
		%		%
All Household Income Levels	72,193	-	41,712	-
Less than 20%	41,034	56.8%	13,022	31.2%
20 to 29%	16,499	22.9%	9,249	22.2%
30% or more	13,874	19.2%	17,323	41.5%
Zero or negative income/no cash rent	786	1.1%	2,118	5.1%

Source: U.S. Census Bureau, Urban Partners

The most cost burdened households in Dauphin County are renters with annual household incomes under \$35,000. A total of 16,952 such renter households reside in the county and 13,776 (or 81.3%) are cost burdened. At earnings greater than \$50,000 annually, owner-and renter-occupied households have a much more even burden of housing costs as a percentage. Households with annual earnings greater than \$75,000 are effectively free of housing cost burdens, both among owner-occupants and renter-occupants (see Table 10 shown below and continued on the following page).

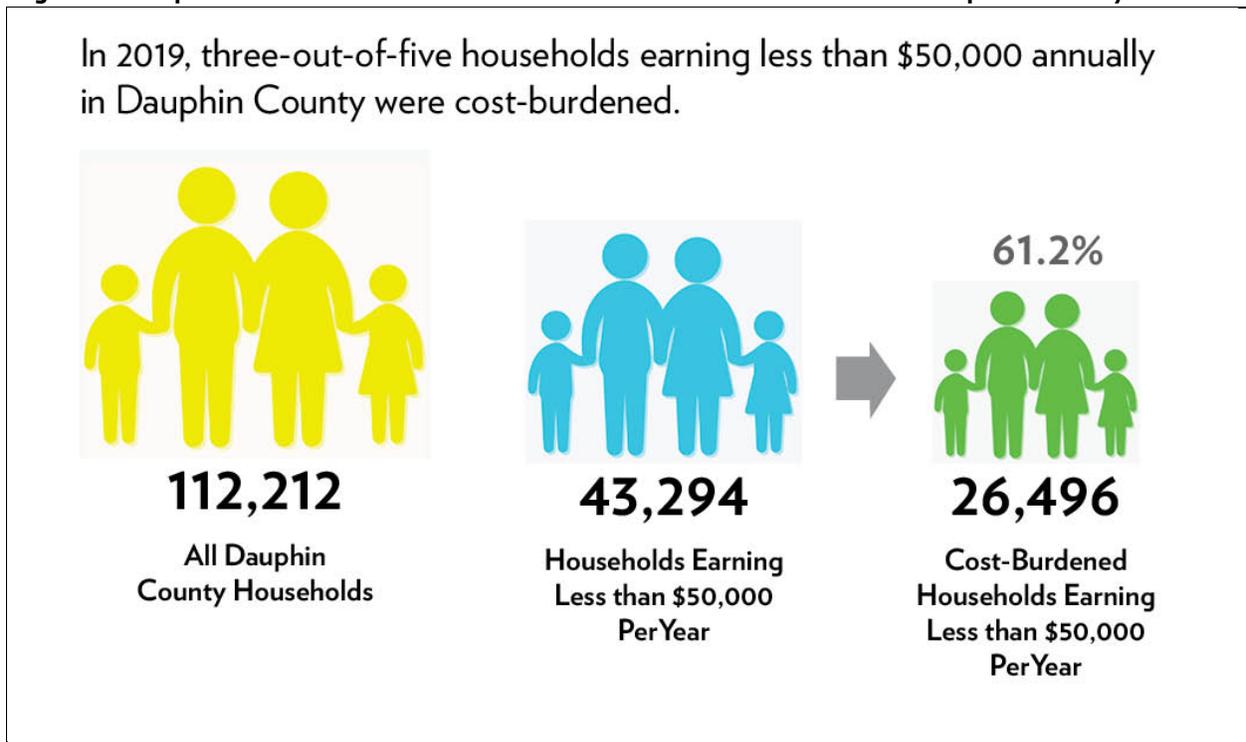
Table 10: Tenure by Housing Costs as a Percentage of Household Income, 2019

	Owner Occupants		Renter Occupants	
		%		%
Households earning less than \$20,000	4,587		8,833	
Less than 30% (not cost burdened)	696	15.2%	11,47	13.0%
30% or more (cost burdened)	3,891	84.8%	7,686	87.0%
Households earning \$20,000 to \$34,999	7,021		8,119	
Less than 30% (not cost burdened)	3,623	51.6%	2,029	25.0%
30% or more (cost burdened)	3,398	48.4%	6,090	75.0%

	Owner Occupants	%	Renter Occupants	%
Households earning \$35,000 to \$49,999	7,961		6,773	
Less than 30% (not cost burdened)	4,939	62.0%	4,364	64.4%
30% or more (cost burdened)	3,022	38.0%	2,409	35.6%
Households earning \$50,000 to \$74,999	14,208		7,605	
Less than 30% (not cost burdened)	11,666	82.1%	6,778	89.1%
30% or more (cost burdened)	2,542	17.9%	827	10.9%
Households earning \$75,000 or more	36,651		7,805	
Less than 30% (not cost burdened)	35,685	97.4%	7,706	98.7%
30% or more (cost burdened)	966	2.6%	99	1.3%

Source: U.S. Census Bureau, Urban Partners

Figure 5: Snapshot of the Cost Burden for Low-Income Households in Dauphin County



Source: U.S. Census Bureau, Urban Partners

Asset Limited, Income Constrained, Employed (ALICE) Population

The ALICE (Asset Limited, Income Constrained, Employed) Project was developed by the United Way to bring focus to families and individuals who are employed but whose salaries do not provide sufficient resources to meet basic needs. Through a standardized methodology using publicly available census, employment, wage, cost of living and other data, the ALICE project sheds light on the financial hardships of working households in Dauphin County.

The United Way’s Household Survival Budget illustrates the bare minimum a household must earn to live and work in the modern economy. These costs include housing, childcare, food, transportation, health care, technology (a smartphone plan), and taxes. It does not include savings for emergencies or future goals like college or retirement. Table 11 shows the Household Survival Budget for Dauphin County by household types.

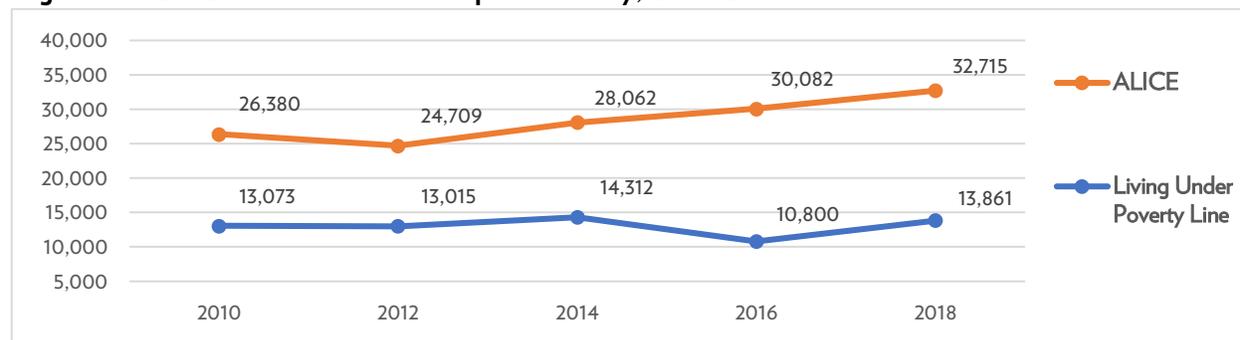
Table 11: Household Survival Budget for Dauphin County, 2018

	Single Adult	Two Adults	Two Adults Two School-Aged Children	Two Adults Two Children in Childcare	Single Senior	Two Seniors
Housing	\$797	\$987	\$1,225	\$1,225	\$797	\$987
Childcare	\$0	\$0	\$470	\$1,338	\$0	\$0
Food	\$282	\$585	\$977	\$853	\$240	\$499
Transportation	\$339	\$511	\$808	\$808	\$293	\$419
Health Care	\$187	\$458	\$716	\$716	\$512	\$1,024
Technology	\$55	\$75	\$75	\$75	\$55	\$75
Miscellaneous	\$200	\$316	\$492	\$590	\$225	\$355
Taxes	\$343	\$540	\$651	\$880	\$351	\$546
Monthly Total	\$2,203	\$3,472	\$5,414	\$6,485	\$2,473	\$3,905
Annual Total	\$26,436	\$41,664	\$64,968	\$77,820	\$29,676	\$46,860
Hourly Wage	\$13.22	\$20.83	\$32.48	\$38.91	\$14.84	\$23.43

Source: United Way ALICE Project

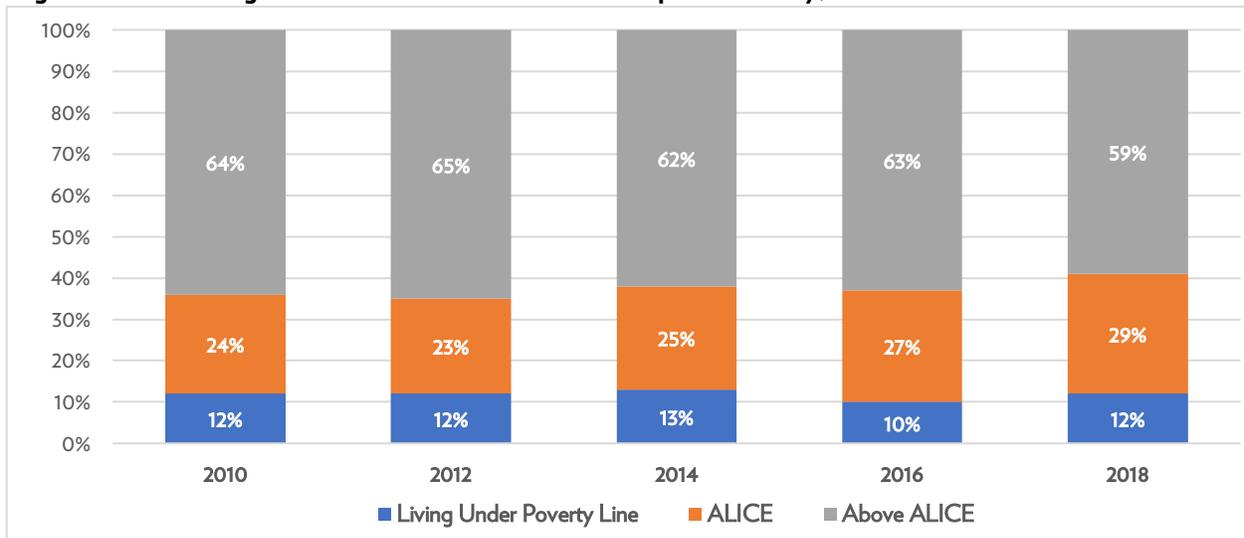
Households that earn above the federal poverty level but cannot afford the bare-bones survival budget are identified as ALICE. In 2018, 32,715 Dauphin County households (29%) were identified as ALICE, up from 26,380 (or 24%) reported in 2010 (see Figure 6 and 7).

Figure 6: ALICE Households in Dauphin County, 2010-2018



Source: United Way ALICE Project

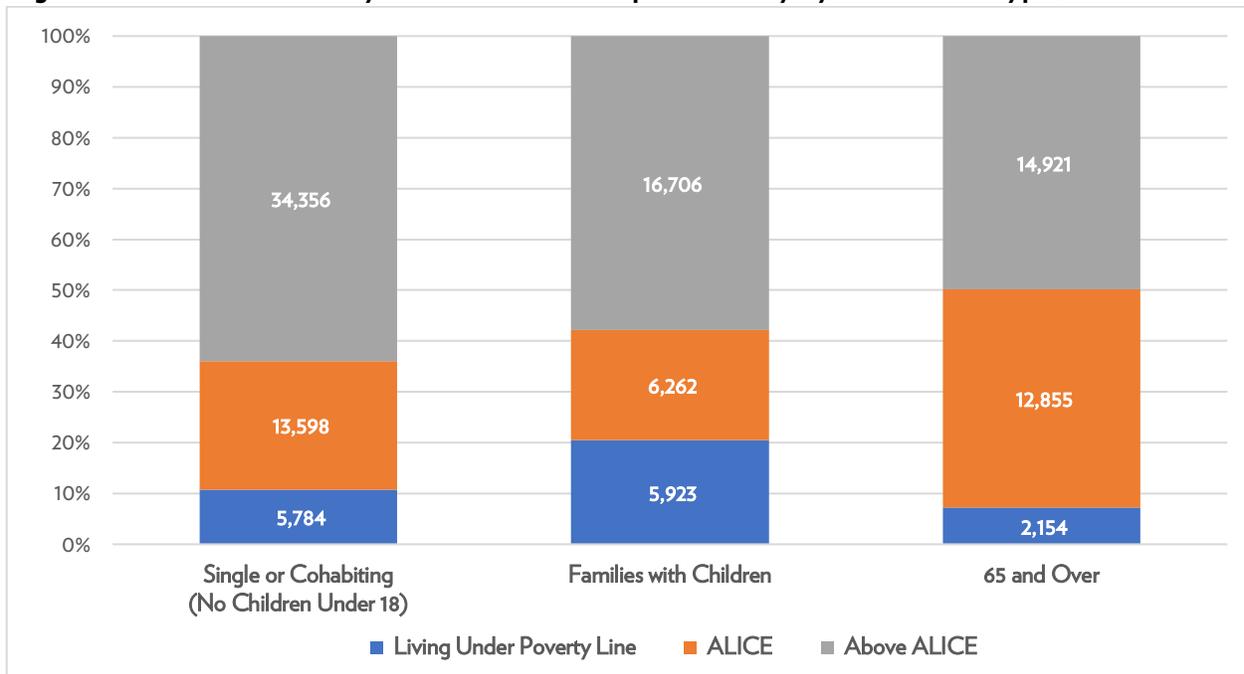
Figure 7: Percentage of ALICE Households in Dauphin County, 2010-2018



Source: United Way ALICE Project

Figure 8 below illustrates the ALICE and poverty levels for different types of Dauphin County households. According to the United Way, half of Dauphin County’s senior households (65 years of age or older) live under the poverty line or are ALICE households.

Figure 8: ALICE and Poverty Households in Dauphin County by Household Type, 2018



Source: United Way ALICE Project

Table 12 is a summary of households living under the poverty line or categorized as ALICE within the 40 jurisdictions within Dauphin County (the column detailing the percentage of households in Poverty or ALICE is color coded to show the highest percentages in deeper red and the lowest percentages in deeper green).

Table 12: Poverty and ALICE Households by Jurisdiction, 2018

	Total Households	Household in Poverty	ALICE Household	% in Poverty or ALICE
Berrysburg Borough	139	9	41	36.0%
Conewago Township	1,091	57	158	19.7%
Dauphin Borough	323	8	79	26.9%
Derry Township	9,794	632	2,181	28.7%
East Hanover Township	2,250	196	480	30.0%
Elizabethville Borough	626	83	261	55.0%
Gratz Borough	307	32	99	42.7%
Halifax Borough	376	41	172	56.6%
Halifax Township	1,398	75	443	37.1%
Harrisburg City	20,520	4,950	7,830	62.3%
Highspire Borough	1,111	166	493	59.3%
Hummelstown Borough	2,142	162	787	44.3%
Jackson Township	686	47	138	27.0%
Jefferson Township	127	7	39	36.2%
Londonderry Township	2,177	111	607	33.0%
Lower Paxton Township	20,736	1,483	5,591	34.1%
Lower Swatara Township	3,493	404	763	33.4%
Lykens Borough	736	166	260	57.9%
Lykens Township	441	32	139	38.8%
Middle Paxton Township	2,138	154	360	24.0%
Middletown Borough	3,736	748	1,196	52.0%
Mifflin Township	239	29	67	40.2%
Millersburg Borough	1,173	128	536	56.6%
Paxtang Borough	690	49	160	30.3%
Penbrook Borough	1,260	232	415	51.3%
Pillow Borough	ALICE data not available			
Reed Township	ALICE data not available			
Royalton Borough	490	58	129	38.2%
Rush Township	108	5	20	23.1%
South Hanover Township	2,576	214	380	23.1%
Steelton Borough	2,065	497	679	56.9%
Susquehanna Township	10,632	787	3,118	36.7%
Swatara Township	9,287	711	2,915	39.0%
Upper Paxton Township	1,797	165	610	43.1%
Washington Township	844	37	268	36.1%
Wayne Township	520	46	82	24.6%
West Hanover Township	4,046	222	635	21.2%
Wiconisco Township	446	63	155	48.9%
Williams Township	478	74	154	47.7%
Williamstown Borough	495	57	210	53.9%

Source: United Way ALICE Project

3. Employment Trends

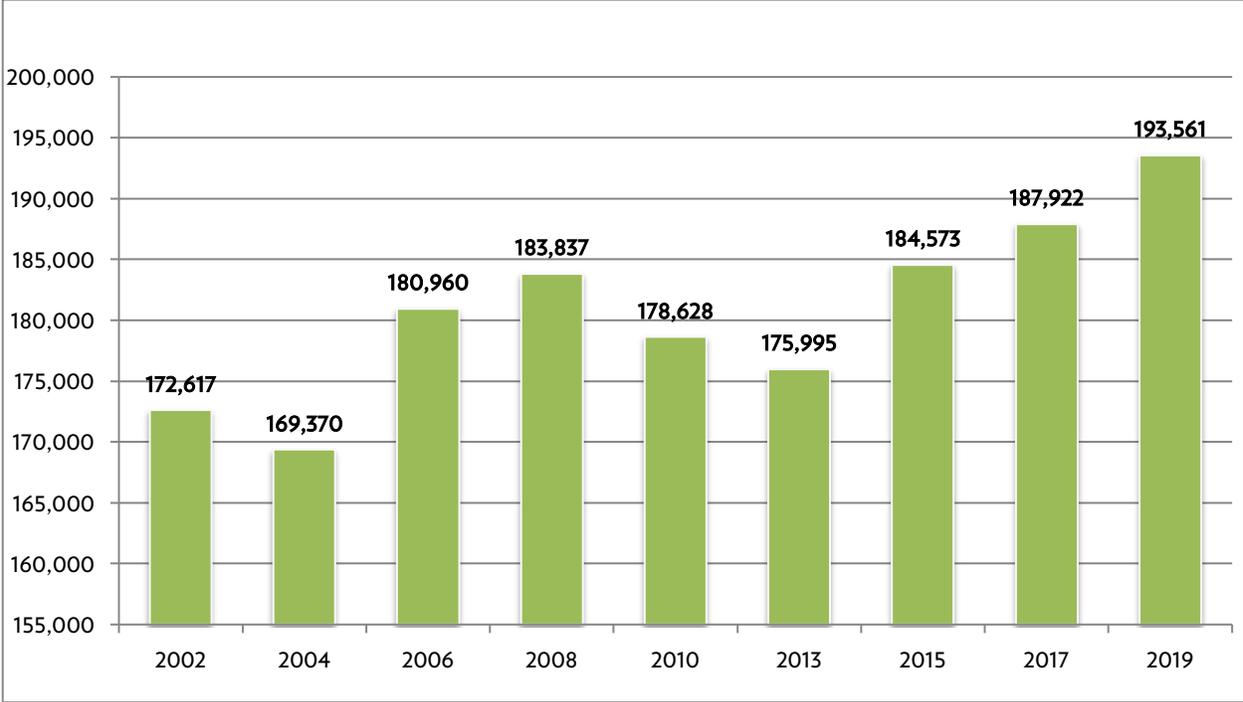
The correlation between job growth (or decline) and the local housing market is complex and beyond the scope of this housing study, but simply stated—as a region or municipality adds new jobs, it attracts new workers and their households that will need housing. The increase in new residents will increase demand for homes and will result in a more competitive marketplace for housing. Conversely, the opposite will occur when a region or municipality loses jobs.

The following is an examination of employment patterns for Dauphin County and its residents from 2002 to 2019. The data source for this analysis is the *OnTheMap* application from the U.S. Census Bureau’s Longitudinal Employer-Household Dynamics Program, which uses employer payroll tax information to geo-locate jobs within a defined area.

Jobs Located in Dauphin County

According to the *OnTheMap* application, Dauphin County reported a total of 193,561 jobs in 2019, adding 20,944 jobs from 2002, a growth of 12.1% (see Figure 9). There were two notable economic dips—first in 2002 to 2004 when the county shed 3,247 jobs, and the second during the Great Recession and the subsequent recovery period when Dauphin County lost 7,842 jobs from 2008 to 2013. From 2013 to 2019, the addition of 17,566 jobs represents a ten percent growth rate during that period.

Figure 9: Jobs Located in the Dauphin County (2002-2019)



Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

Detailed in Table 13 below, the *Health Care & Social Assistance* overtook *Public Administration* as the top employment sector in 2019. The 33,916 jobs in the *Health Care & Social Assistance* sector account for 17.5% of all jobs located in Dauphin County and more than half of all net employment gains from 2002 to 2019. The *Public Administration* sector, which shed 4,152 jobs from 2002 to 2019, is the second largest sector with 25,914 jobs in the county. Two other industrial sectors experienced robust job growth in the county from 2002 to 2019—*Transportation and Warehousing*, which added 4,761 net new jobs (growth rate of 72.8%); and *Administrative & Support, Waste Management/Remediation* sector³ which added 4,242 net new jobs (growth rate of 62.8%).

Other than *Public Administration*, the *Manufacturing* sector lost the most jobs from 2002 to 2019 (a total of 3,508 jobs were lost, equivalent to a 22.1% decline).

Table 13: Jobs Located in Dauphin County by Industry Sectors, 2002-2019

	Jobs in 2002	%	Jobs in 2019	%	Change 2002-2019
All Sectors	172,617	100.0%	193,561	100.0%	20,944
Health Care and Social Assistance	22,941	13.3%	33,916	17.5%	10,975
Public Administration	30,066	17.4%	25,914	13.4%	-4,152
Retail Trade	13,993	8.1%	15,063	7.8%	1,070
Accommodation and Food Services	11,470	6.6%	13,726	7.1%	2,256
Educational Services	10,073	5.8%	12,395	6.4%	2,322
Manufacturing	15,887	9.2%	12,379	6.4%	-3,508
Finance and Insurance	12,135	7.0%	12,304	6.4%	169
Transportation and Warehousing	6,544	3.8%	11,305	5.8%	4,761
Admin & Support, Waste Mgmt/Remed.	6,760	3.9%	11,002	5.7%	4,242
Professional, Scientific, and Technical Services	7,300	4.2%	8,786	4.5%	1,486
Wholesale Trade	8,464	4.9%	7,399	3.8%	-1,065
Other Services (excluding Public Administration)	5,526	3.2%	6,731	3.5%	1,205
Arts, Entertainment, and Recreation	4,850	2.8%	6,555	3.4%	1,705
Construction	6,940	4.0%	6,095	3.1%	-845
Management of Companies and Enterprises	2,791	1.6%	4,691	2.4%	1,900
Information	3,923	2.3%	2,620	1.4%	-1,303
Real Estate and Rental and Leasing	1,169	0.7%	1,466	0.8%	297
Utilities	1,040	0.6%	999	0.5%	-41
Agriculture, Forestry, Fishing and Hunting	654	0.4%	185	0.1%	-469
Mining, Quarrying, and Oil and Gas Extraction	91	0.1%	30	0.0%	-61

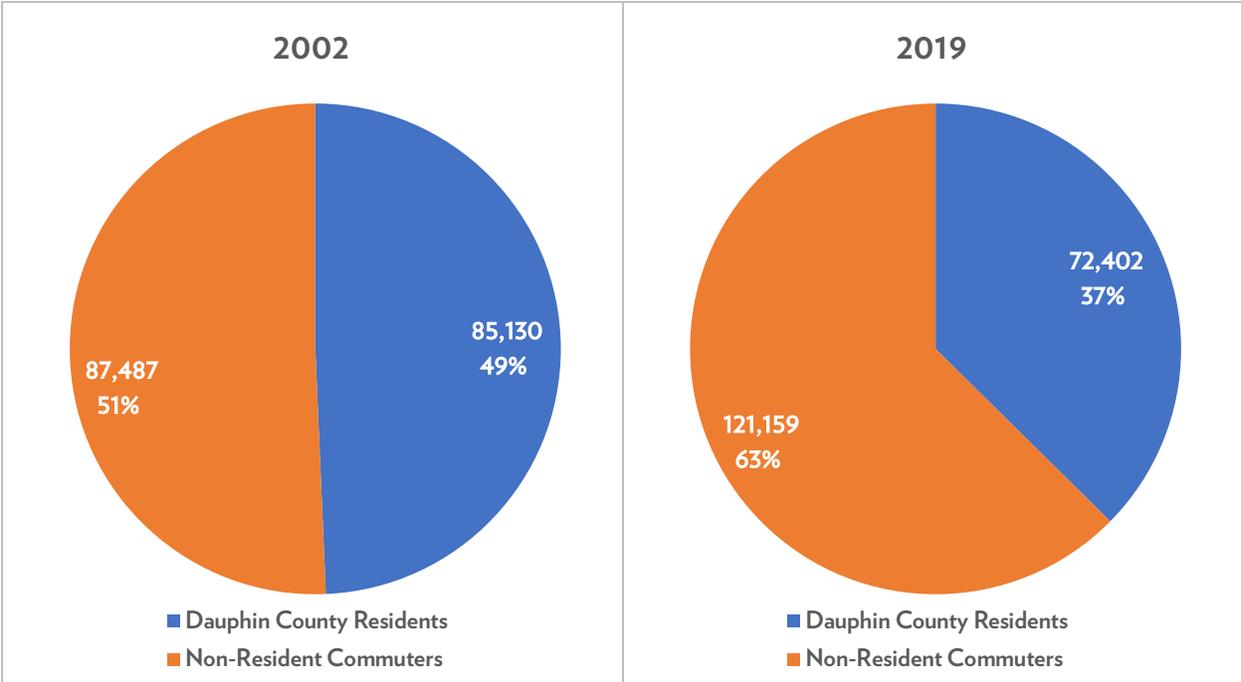
Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

In terms of commuting, the *OnTheMap* application reports that the percentage of workers commuting from outside of the county have increased significantly, from 87,487 workers in 2002 to 121,159 in 2019. Despite the overall increase in employment, the number of workers

³ Top occupations in the *Administrative & Support, Waste Management/Remediation* sector include: janitors and cleaners, laborers; freight, stock, and material movers; landscaping and groundskeeping workers; office clerks; and security guards.

living and working in Dauphin County have dipped from 85,130 in 2002 to 72,402 in 2019 (see Figure 10).

Figure 10: Percentage of Dauphin County Residents Working in the County, 2002-2019



Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

As a percentage of the Dauphin County labor force, county residents still comprise the large segment in 2019 (37.4%), followed by those commuting from Cumberland County (which increased from 13,580 workers in 2002 to 25,654 in 2019). Commuters from York County and Lancaster County also saw significant increases (25.8% and 70.1% from 2002 to 2019, respectively. See Table 14).

Table 14: Top 10 Commuting Origins for Dauphin County Workers, 2002-2019

	Jobs in 2002	%	Jobs in 2019	%	% Change 2002-2019
Dauphin County	85,130	49.3%	72,402	37.4%	-15.0%
Cumberland County	13,580	7.9%	25,654	13.3%	88.9%
York County	11,638	6.7%	14,643	7.6%	25.8%
Lebanon County	13,114	7.6%	13,827	7.1%	5.4%
Lancaster County	7,469	4.3%	12,706	6.6%	70.1%
Perry County	4,694	2.7%	5,137	2.7%	9.4%
Schuylkill County	3,140	1.8%	2,986	1.5%	-4.9%
Berks County	2,248	1.3%	2,977	1.5%	32.4%
Philadelphia County	2,651	1.5%	2,791	1.4%	5.3%
Allegheny County	1,621	0.9%	2,274	1.2%	40.3%
All Other Locations	27,332	15.8%	38,164	19.7%	39.6%

Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

Employed Dauphin County Residents

According to the *OnTheMap* application, there were a total of 133,509 employed residents of Dauphin County in 2019, a decrease of 3,235 persons (2.4%) from 2002 (see Table 15). The following were the top five sectors in which county residents were employed in 2019: *Health Care & Social Assistance*; *Retail Trade*; *Accommodation & Food Services*; *Transportation & Warehousing*; and *Public Administration*.

There were three most notable observations for this period: ii) the percentage of Dauphin County residents employed in the *Health Care & Social Assistance* sector increased from 12.6% to 16.8%, accounting for 5,307 additional workers; ii) county residents employed in the *Transportation & Warehousing* sector increased by 3,814 additional workers; and iii) there were 9,155 fewer county residents in the *Public Administration* and *Manufacturing* sectors, reductions of 6,061 workers and 3,094 workers, respectively.

Table 15: Jobs of Dauphin County Residents by Industry Sectors, 2002-2019

	Jobs in 2002	%	Jobs in 2019	%	Change 2002-2019
All Sectors	136,744	100.0%	133,509	100.0%	-3,235
Health Care and Social Assistance	17,181	12.6%	22,488	16.8%	5,307
Retail Trade	14,080	10.3%	13,128	9.8%	-952
Accommodation and Food Services	9,832	7.2%	10,730	8.0%	898
Transportation and Warehousing	6,863	5.0%	10,677	8.0%	3,814
Public Administration	15,869	11.6%	9,808	7.3%	-6,061
Manufacturing	12,862	9.4%	9,768	7.3%	-3,094
Admin & Support, Waste Mgmt/Remed.	6,208	4.5%	9,446	7.1%	3,238
Educational Services	9,465	6.9%	9,220	6.9%	-245
Finance and Insurance	9,941	7.3%	7,321	5.5%	-2,620
Professional, Scientific, and Technical Services	6,525	4.8%	6,683	5.0%	158
Wholesale Trade	6,348	4.6%	4,749	3.6%	-1,599
Other Services (excluding Public Administration)	4,725	3.5%	4,722	3.5%	-3
Construction	5,563	4.1%	4,429	3.3%	-1,134
Management of Companies and Enterprises	2,029	1.5%	3,289	2.5%	1,260
Arts, Entertainment, and Recreation	2,801	2.0%	3,219	2.4%	418
Information	3,632	2.7%	1,670	1.3%	-1,962
Real Estate and Rental and Leasing	1,339	1.0%	1,225	0.9%	-114
Utilities	739	0.5%	464	0.3%	-275
Agriculture, Forestry, Fishing and Hunting	638	0.5%	390	0.3%	-248
Mining, Quarrying, and Oil and Gas Extraction	104	0.1%	83	0.1%	-21

Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

The *OnTheMap* application reports that 72,402 out of the 133,509 employed Dauphin County residents, or 54.2%, work inside the county, meaning that 45.8% of employed county residents commute elsewhere for work. As a comparison, 37.7% of employed Dauphin County residents (51,614) worked outside the county in 2002. Approximately a third of all out-commuting

Dauphin County residents (19,860) commuted to Cumberland County for work, followed by those commuting to Lancaster County (6,130, see Table 16).

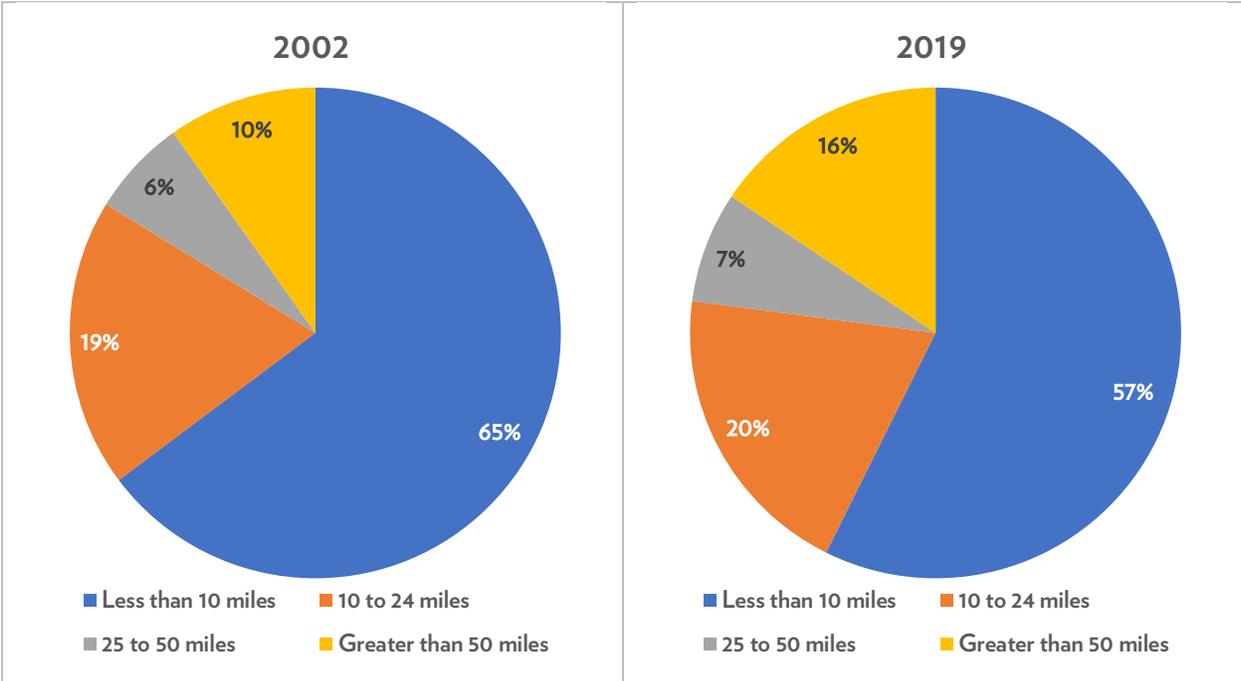
Table 16: Top Commuting Destinations for Employed Dauphin County Residents, 2002-2019

	Jobs in 2002	%	Jobs in 2019	%	% Change 2002-2019
Dauphin County	85,130	62.3%	72,402	54.2%	-15.0%
Cumberland County	21,318	15.6%	19,860	14.9%	-6.8%
Lancaster County	5,210	3.8%	6,130	4.6%	17.7%
York County	4,130	3.0%	5,789	4.3%	40.2%
Lebanon County	2,731	2.0%	3,164	2.4%	15.9%
Montgomery County	1,520	1.1%	2,172	1.6%	42.9%
Philadelphia County	1,349	1.0%	1,977	1.5%	46.6%
Berks County	1,757	1.3%	1,801	1.3%	2.5%
Allegheny County	815	0.6%	1,501	1.1%	84.2%
Lehigh County	1,027	0.8%	1,341	1.0%	30.6%
All Other Locations	11,757	8.6%	17,372	13.0%	47.8%

Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

Commuting distances have also evolved among employed Dauphin County residents. In 2002, 65% of employed county residents traveled less than 10 miles for work and 10% lived more than 50 miles from their work locations. In 2019, 57% of employed Dauphin County residents reported commutes of less than 10 miles, while the percentage of county residents commuting more than 50 miles increased to 16% (see Figure 11).

Figure 11: Commuting Distances of Employed Dauphin County Residents, 2002-2019



Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

Figure 12 shows the percentage of employed residents who live more than 50 miles from their place of employment from 2002 to 2019. Compared to the state average, a larger percentage of employed Dauphin County residents commute more than 50 miles (15.6% compared to 12.2%).

Figure 12: Percentage of Workers that Live More than 50 Miles from Work, 2002-2019

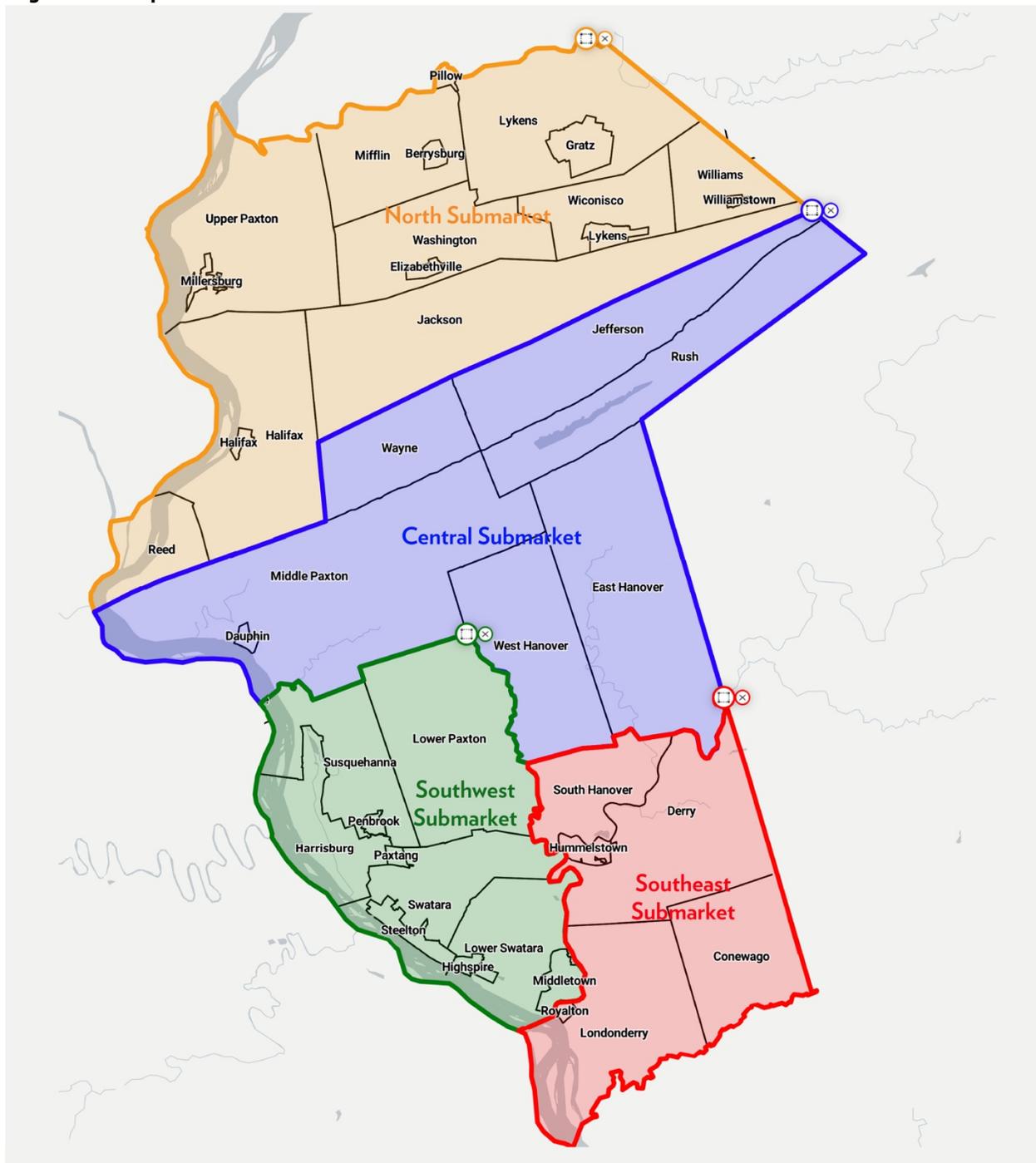


Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

4. Submarkets within Dauphin County

To account for unique attributes within different sections of the county, the following housing supply and housing market analyses were organized into four submarkets: North, Central, Southeast, and Southwest (see Figure 13).

Figure 13: Map of Submarkets



North Submarket Jurisdictions	Central Submarket Jurisdictions
<ul style="list-style-type: none"> - <u>Townships</u>: Halifax, Jackson, Lykens, Mifflin, Reed, Upper Paxton, Washington, Wiconisco, Williams - <u>Boroughs</u>: Berrysburg, Elizabethville, Gratz, Halifax, Lykens, Millersburg, Pillow, Williamstown 	<ul style="list-style-type: none"> - <u>Townships</u>: East Hanover, Jefferson, Lykens, Middle Paxton, Rush, Wayne, West Hanover - <u>Boroughs</u>: Dauphin
Southeast Submarket Jurisdictions	Southwest Submarket Jurisdictions
<ul style="list-style-type: none"> - <u>Townships</u>: Conewago, Derry, Londonderry, South Hanover - <u>Boroughs</u>: Hummelstown, Royalton 	<ul style="list-style-type: none"> - <u>Cities</u>: Harrisburg - <u>Townships</u>: Lower Paxton, Lower Swatara, Susquehanna, Swatara - <u>Boroughs</u>: Highspire, Middletown, Paxtang, Penbrook, Steelton

Table 17 below summarizes the population and household trends for the four submarkets. The Southwest Submarket is the most populated of the four with 179,327 residents and 73,943 households as of 2019, while the Central Submarket reports the fewest residents at 24,103—though it led the way with a population growth rate of 9.0% and household growth rate of 9.6% from 2010 to 2019.

Table 17: Submarket Population Trends, 2010-2019

	2010 ACS	2019 ACS	Change (2010-2019)	% Change (2010-2019)
Population				
Dauphin County Total	264,823	275,632	10,809	4.1%
North Submarket	25,577	26,097	520	2.0%
Central Submarket	22,122	24,103	1,981	9.0%
Southeast Submarket	43,817	46,105	2,288	5.2%
Southwest Submarket	173,307	179,327	6,020	3.5%
Households				
Dauphin County Total	107,808	112,212	4,404	4.1%
North Submarket	9,986	10,445	459	4.6%
Central Submarket	8,538	9,361	823	9.6%
Southeast Submarket	17,522	18,463	941	5.4%
Southwest Submarket	71,762	73,943	2,181	3.0%

Source: U.S. Census Bureau, Urban Partners

Table 18 shows the population trends for the 40 jurisdictions within Dauphin County. Lower Paxton Township added the most residents (2,262) while Lykens Township grew the fastest as a percentage of their 2010 population (53.9%).

Table 18: Population Trends by Jurisdiction, 2010-2019

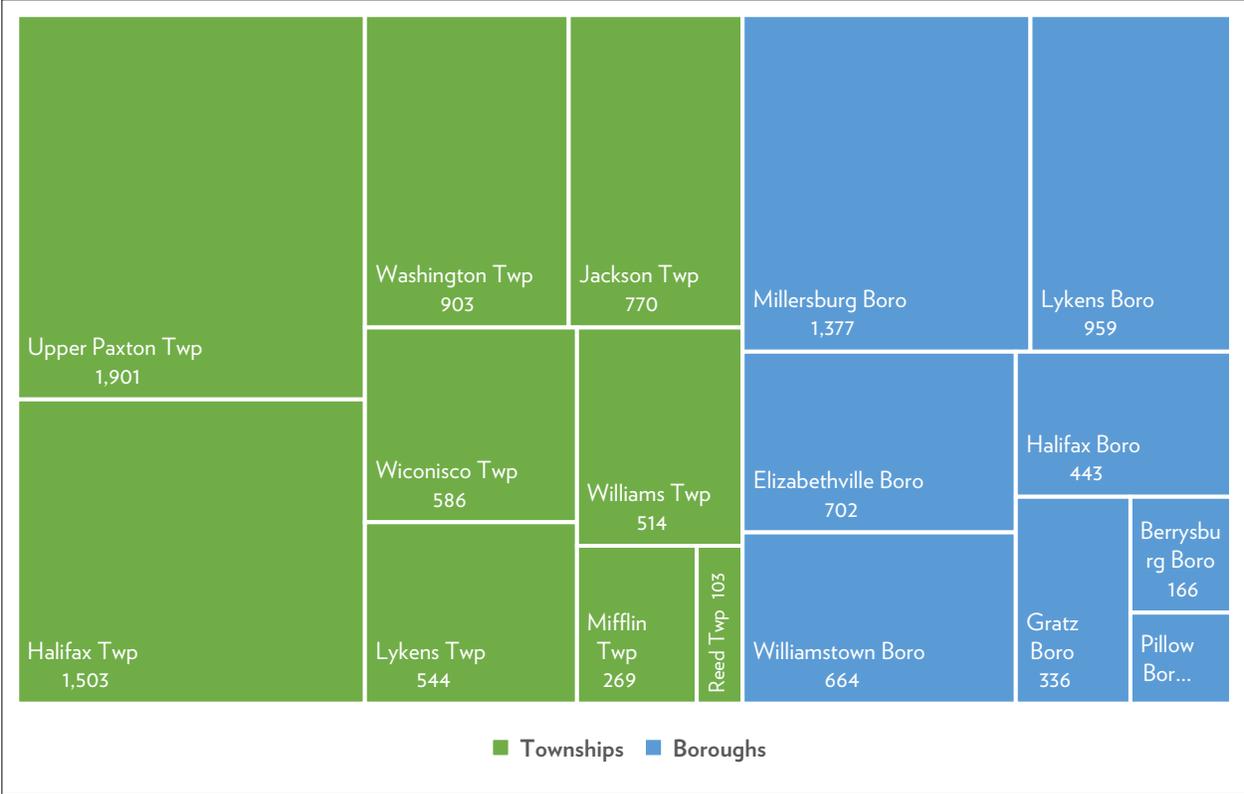
	2010 ACS	2019 ACS	Change (2010-2019)	% Change (2010-2019)
County Total	264,823	275,632	10,809	4.1%
Berrysburg Borough	375	339	-36	-9.6%
Conewago Township	2,967	3,078	111	3.7%
Dauphin Borough	751	774	23	3.1%
Derry Township	24,030	25,093	1,063	4.4%
East Hanover Township	5,651	5,935	284	5.0%
Elizabethville Borough	1,618	1,611	-7	-0.4%
Gratz Borough	672	745	73	10.9%
Halifax Borough	699	989	290	41.5%
Halifax Township	3,449	3,500	51	1.5%
Harrisburg City	49,332	49,209	-123	-0.2%
Highspire Borough	2,712	2,492	-220	-8.1%
Hummelstown Borough	4,502	4,688	186	4.1%
Jackson Township	1,908	1,791	-117	-6.1%
Jefferson Township	383	319	-64	-16.7%
Londonderry Township	5,222	5,228	6	0.1%
Lower Paxton Township	46,803	49,065	2,262	4.8%
Lower Swatara Township	8,211	8,837	626	7.6%
Lykens Borough	1,949	1,807	-142	-7.3%
Lykens Township	1,102	1,696	594	53.9%
Middle Paxton Township	4,956	5,080	124	2.5%
Middletown Borough	8,970	9,315	345	3.8%
Mifflin Township	831	814	-17	-2.0%
Millersburg Borough	2,567	2,519	-48	-1.9%
Paxtang Borough	1,501	1,726	225	15.0%
Penbrook Borough	3,013	2,984	-29	-1.0%
Pillow Borough	234	320	86	36.8%
Reed Township	240	216	-24	-10.0%
Royalton Borough	1,123	1,221	98	8.7%
Rush Township	235	307	72	30.6%
South Hanover Township	5,973	6,797	824	13.8%
Steelton Borough	5,994	5,953	-41	-0.7%
Susquehanna Township	23,614	24,954	1,340	5.7%
Swatara Township	23,157	24,792	1,635	7.1%
Upper Paxton Township	4,123	4,259	136	3.3%
Washington Township	1,941	2,196	255	13.1%
Wayne Township	1,323	1,336	13	1.0%
West Hanover Township	8,823	10,352	1,529	17.3%
Wiconisco Township	1,375	1,058	-317	-23.1%
Williams Township	1,255	1,003	-252	-20.1%
Williamstown Borough	1,239	1,234	-5	-0.4%

Source: U.S. Census Bureau, Urban Partners

Housing Supply Analysis – North Submarket

The North Submarket and its 17 jurisdictions represent 9.5% of the total County’s housing supply. Figure 14 illustrates the distribution of the North Submarket housing supply by jurisdiction. Upper Paxton Township reports the largest supply among the nine townships with 1,901 housing units, while Millersburg Borough is the largest among the eight boroughs with 1,377 units.

Figure 14: Number of Housing Units by Jurisdiction, North Submarket, 2019



Source: U.S. Census Bureau, Urban Partners

From 2010 to 2019, the total number of housing units in the North Submarket grew by 7.3%. The vacancy rate increased nearly by one-third, reporting 12.0% (1,425 units) in 2019 compared to 9.8% (1,080 units) in 2010 (see Table 19).

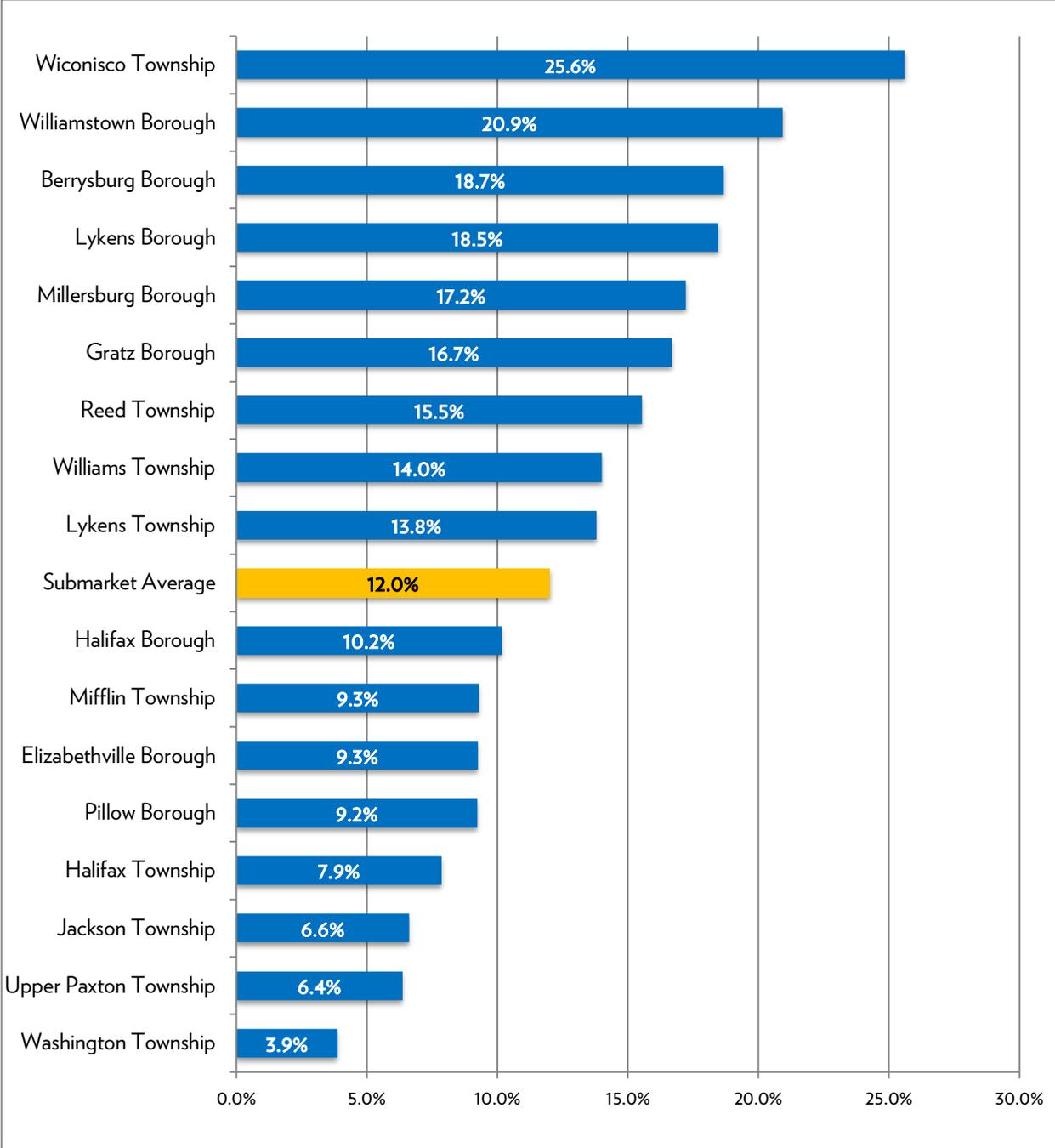
Table 19: Total Housing Units and Occupancy Status, North Submarket, 2010-2019

	2010 ACS	%	2019 ACS	%	Change 2010-2019	% Change 2010-2019
Total Housing Units	11,066	-	11,870	-	804	7.3%
Occupied Units	9,986	90.2%	10,445	88.0%	459	4.6%
Vacant Units	1,080	9.8%	1,425	12.0%	345	31.9%

Source: U.S. Census Bureau, Urban Partners

Of the 17 jurisdictions that comprise the North Submarket, Wiconisco Township reports the highest housing vacancy rate of 25.6%, followed by Williamstown Borough (20.9%) and Berrysburg Borough (18.7%). The jurisdictions with the lowest housing vacancy rates are Washington Township (3.9%), Upper Paxton Township (6.4%), and Jackson Township (6.6%, see Figure 15).

Figure 15: Vacancy Rates by Jurisdiction, North Submarket, 2019



Source: U.S. Census Bureau, Urban Partners

The 2019 ACS specifies that in the North Submarket, 12.6% of the vacant units were available for rent, while another 5.0% were rented but not yet occupied (see Table 20). The number of for sale only homes dropped from 256 units in 2010 to 99 units (6.9%). The most significant increase in the type of vacant units occurred with “other vacant” units, which comprised 65.1% of all vacant units in 2019⁴.

Table 20: Vacancy Status, North Submarket, 2010-2019

	2010 ACS	%	2019 ACS	%	% Change 2010-2019	% Change 2010-2019
Total	1,080	-	1,425	-	345	31.9%
For rent	148	13.7%	180	12.6%	32	21.6%
Rented, not occupied	6	0.6%	71	5.0%	65	1083.3%
For sale only	256	23.7%	99	6.9%	-157	-61.3%
Sold, not occupied	149	13.8%	42	2.9%	-107	-71.8%
For seasonal use	82	7.6%	105	7.4%	23	28.0%
For migrant workers	0	-	0	-	0	-
Other vacant	439	40.6%	928	65.1%	489	111.4%

Source: U.S. Census Bureau, Urban Partners

Table 21 describes changes in tenure, or owner/renter characteristics for the North Submarket. The total number of occupied housing units increased by 459 from 2010 to 2019, and the vast majority (447 units, or 97.4%) of the additional units were owner-occupied homes. As a result, the homeownership rate increased from 74.0% in 2010 to 75.0% in 2019.

Table 21: Housing Tenure, North Submarket, 2010-2019

	2010 ACS	%	2019 ACS	%	Change 2010-2019	% Change 2010-2019
Total Occupied Units	9,986	-	10,445	-	459	4.6%
Owner-Occupied Units	7,387	74.0%	7,834	75.0%	447	6.1%
Renter-Occupied Units	2,599	26.0%	2,611	25.0%	12	0.5%

Source: U.S. Census Bureau, Urban Partners

A detailed breakdown of the age of housing stock by tenure for the North Submarket is shown in Table 22 on the following page. It shows that more than half of all housing units in the North Submarket were built before 1960. The U.S. Census Bureau also reports that owner-occupied homes are newer than renter-occupied homes (16.9% of the owner-occupied housing were built in 1990 or later, compared to 11.5% of renter-occupied homes). Of the 10,445 occupied housing units in the North Submarket, only 735 units were built in 2000 or later (7.0%).

⁴ “Other Vacant” units includes: foreclosed properties; units vacant due to the owners’ preferences and/or personal situation (owner does not want to rent/sell, owner is staying with family, owner is in assisted living, etc.); units vacant due to legal issues or disputes; unoccupiable properties (abandoned/condemned); units needing repairs before they can be sold or rented and units being repaired; and units used for storage of household furniture.

Table 22: Age of Housing Stock by Tenure, North Submarket, 2019

	All Units		Owner-Occupied		Renter-Occupied	
	Units	%	Units	%	Units	%
Built 2014 or later	36	0.3%	19	0.2%	17	0.7%
Built 2010 to 2013	125	1.2%	100	1.3%	25	1.0%
Built 2000 to 2009	574	5.5%	462	5.9%	112	4.3%
Built 1990 to 1999	889	8.5%	742	9.5%	147	5.6%
Built 1980 to 1989	1,027	9.8%	781	10.0%	246	9.4%
Built 1970 to 1979	1,673	16.0%	1,240	15.8%	433	16.6%
Built 1960 to 1969	884	8.5%	614	7.8%	270	10.3%
Built 1950 to 1959	1,127	10.8%	818	10.4%	309	11.8%
Built 1940 to 1949	576	5.5%	398	5.1%	178	6.8%
Built 1939 or earlier	3,534	33.8%	2,660	34.0%	874	33.5%

Source: U.S. Census Bureau, Urban Partners

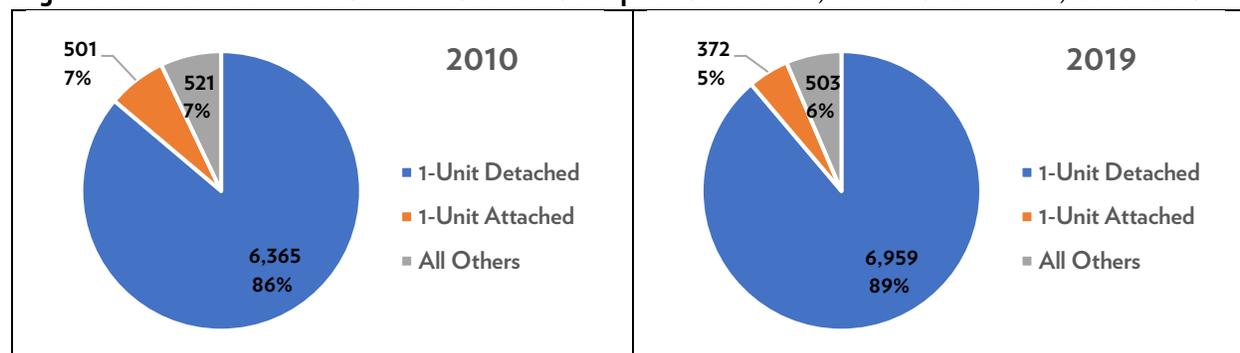
A majority of homes in the North Submarket (82.7%) are one-unit structures—both attached and detached types (see Table 23). According to the 2019 ACS, 93.6% of the homeowners live in residential structures with just one unit (see Figure 16). The largest segment of renter households resides in single-family detached structures (30.3%) but compared to homeowners, they are more evenly distributed in terms of units in structure. Mobile homes make up 5.1% of the overall housing stock in the North Submarket.

Table 23: Units in Structure by Tenure, North Submarket, 2019

	All Units		Owner-Occupied		Renter-Occupied	
	Units	%	Units	%	Units	%
1 Unit, detached	7,750	74.2%	6,959	88.8%	791	30.3%
1 Unit, attached	889	8.5%	372	4.7%	517	19.8%
2 Units	337	3.2%	59	0.8%	278	10.6%
3 or 4 Units	361	3.5%	17	0.2%	344	13.2%
5 to 9 Units	223	2.1%	-	-	223	8.5%
10 to 19 Units	171	1.6%	-	-	171	6.5%
20 to 49 Units	146	1.4%	-	-	146	5.6%
50 or more Units	28	0.3%	-	-	28	1.1%
Mobile home	536	5.1%	427	5.5%	109	4.2%
Boat, RV, van, etc.	4	0.0%	-	-	4	0.2%

Source: U.S. Census Bureau, Urban Partners

Figure 16: Distribution of Units in Owner-Occupied Structures, North Submarket, 2010-2019



Source: U.S. Census Bureau, Urban Partners

Income-Restricted Communities in the North Submarket

Table 24 is a detailed list of the 12 income-restricted communities in the North Submarket that total 335 units. These units currently represent approximately 13% of the total rental market. Public Housing Units total 137 units, followed by 142 Low-Income Housing Tax Credit units, and 56 units supported by U.S. Department of Agriculture’s Section 515 Rural Rental Housing Program.

Table 24: List of Income-Restricted Communities, North Submarket

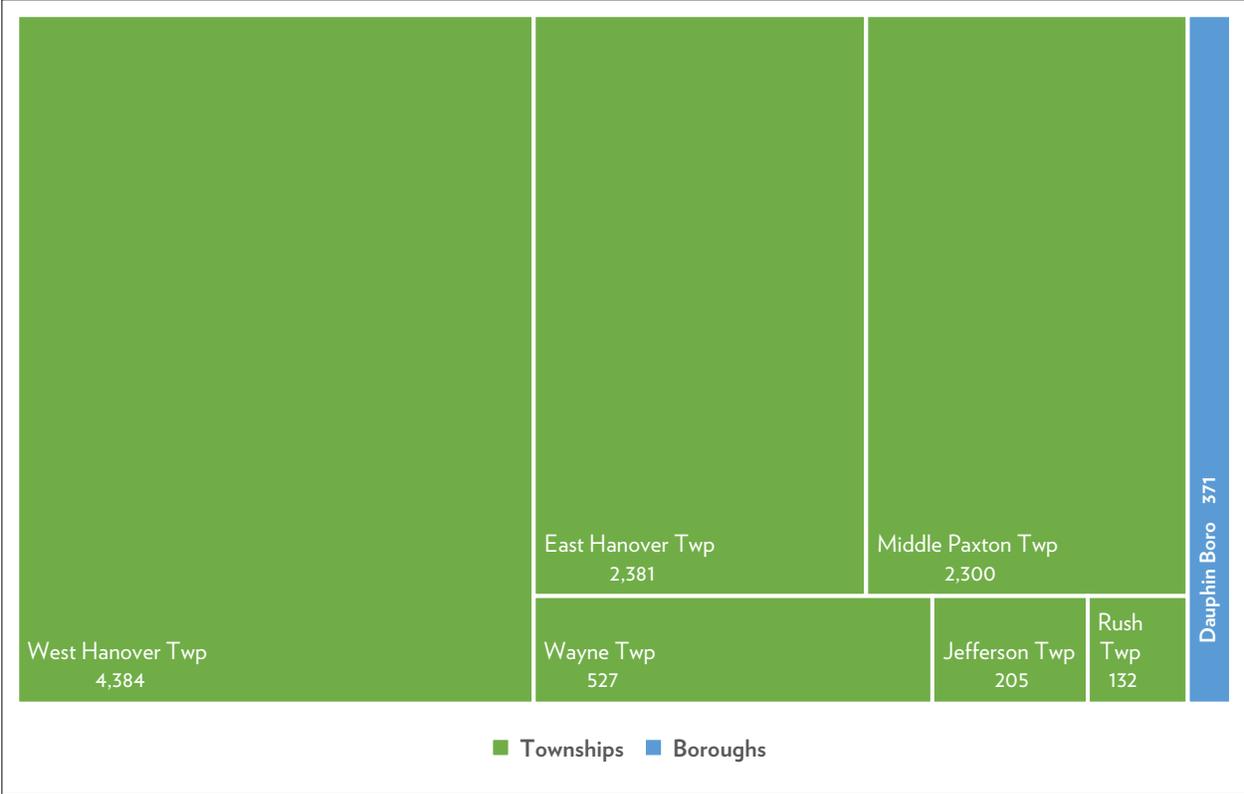
	Name	Address	Type	Subsidized Units	Earliest Expiration Date
1	Fairview Estates	Halifax Township	LIHTC	6	2026
2	Greenfield Estates	Elizabeth Borough	LIHTC	24	2027
3	Harvestview Apartments	Elizabethville Borough	USDA Rural	20	2036
4	Hillside Heights	Millersburg Borough	LIHTC	24	2027
5	Hollywood Commons	Elizabeth Borough	LIHTC	20	2021
6	Hollywood Court	Elizabethville Borough	USDA Rural	20	2045
7	Laurel Hill	Williams Township	Public Housing	70	N/A
8	Quail Commons	Halifax Township	LIHTC	24	2028
9	Rattling Creek Apartments	Lykens Borough	Public Housing	67	N/A
10	Union House Apartments	Lykens Borough	LIHTC	28	2032
11	Valley View Assoc	Halifax Borough	LIHTC	16	2021
12	Valley View Terrace Apartments	Halifax Borough	USDA Rural	16	N/A

Source: HUD, PolicyMap, Urban Partners

Housing Supply Analysis – Central Submarket

The Central Submarket and its seven jurisdictions represent 8.3% of the total County’s housing supply. Figure 17 illustrates the distribution of the Central Submarket housing supply by jurisdiction. West Hanover Township reports the largest supply among the six townships with 4,384 housing units, while Dauphin Borough is the only borough in the Central Submarket, reporting just 371 units.

Figure 17: Number of Housing Units by Jurisdiction, Central Submarket, 2019



Source: U.S. Census Bureau, Urban Partners

From 2010 to 2019, the total number of housing units in the Central Submarket grew by 15.9%. The vacancy rate increased more than doubled, reporting 9.1% (939 units) in 2019 compared to 3.9% (348 units) in 2010 (see Table 25).

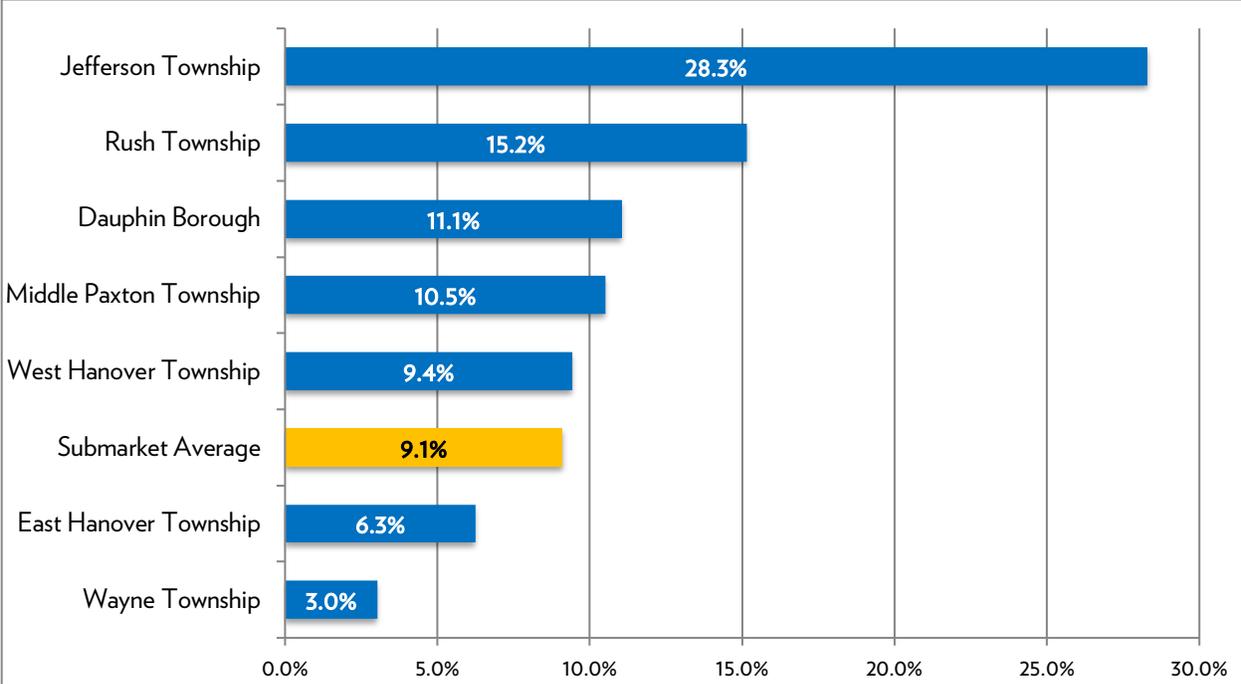
Table 25: Total Housing Units and Occupancy Status, Central Submarket, 2010-2019

	2010 ACS	%	2019 ACS	%	Change 2010-2019	% Change 2010-2019
Total Housing Units	8,886	-	10,300	-	1,414	15.9%
Occupied Units	8,538	96.1%	9,361	90.9%	823	9.6%
Vacant Units	348	3.9%	939	9.1%	591	169.8%

Source: U.S. Census Bureau, Urban Partners

Of the seven jurisdictions that comprise the Central Submarket, Jefferson Township reports the highest housing vacancy rate of 28.6%, followed by Rush Township (15.2%) and Dauphin Borough (11.1%). The jurisdictions with the lowest housing vacancy rates are Wayne Township (3.0%) and East Hanover Township (6.3%, see Figure 18).

Figure 18: Vacancy Rates by Jurisdiction, Central Submarket, 2019



Source: U.S. Census Bureau, Urban Partners

The 2019 ACS specifies that in the Central Submarket, 21.1% of the vacant units were available for sale, while another 20.9% were sold, not occupied (see Table 26). The most significant increase in the type of vacant units occurred with “other vacant” units, which comprised 42.2% of all vacant units in 2019.

Table 26: Vacancy Status, Central Submarket, 2010-2019

	2010 ACS	%	2019 ACS	%	Change 2010-2019	% Change 2010-2019
Total	348	-	939	-	591	169.8%
For rent	16	4.6%	66	7.0%	50	312.5%
Rented, not occupied	-	0.0%	-	-	-	-
For sale only	137	39.4%	198	21.1%	61	44.5%
Sold, not occupied	56	16.1%	196	20.9%	140	250.0%
For seasonal use	66	19.0%	83	8.8%	17	25.8%
For migrant workers	-	-	-	-	0	-
Other vacant	73	21.0%	396	42.2%	323	442.5%

Source: U.S. Census Bureau, Urban Partners

Table 27 describes changes in tenure, or owner/renter characteristics for the Central Submarket. The net increase of occupied housing units from 2010 to 2019 was 823 units—addition of 943 owner-occupied units and a loss of 120 renter-occupied units. As a result, the homeownership rate increased from 88.2% in 2010 to 90.5% in 2019.

Table 27: Housing Tenure, Central Submarket, 2010-2019

	2010 ACS	%	2019 ACS	%	Change 2010-2019	% Change 2010-2019
Total Occupied Units	8,538	-	9,361	-	823	9.6%
Owner-Occupied Units	7,528	88.2%	8,471	90.5%	943	12.5%
Renter-Occupied Units	1,010	11.8%	890	9.5%	-120	-11.9%

Source: U.S. Census Bureau, Urban Partners

A detailed breakdown of the age of housing stock by tenure for the Central Submarket is shown in Table 28 below. It shows that approximately a quarter of all housing units in the Central Submarket were built before 1960. The U.S. Census Bureau also reports that owner-occupied homes are newer than renter-occupied homes (41.5% of the owner-occupied housing were built in 1990 or later, compared to 20.7% of renter-occupied homes). Of the 9,361 occupied housing units in the Central Submarket, 27.2% (2,546 units) were built in 2000 or later.

Table 28: Age of Housing Stock by Tenure, Central Submarket, 2019

	All Units	%	Owner- Occupied	%	Renter- Occupied	%
Built 2014 or later	342	3.7%	294	3.5%	48	5.4%
Built 2010 to 2013	267	2.9%	257	3.0%	10	1.1%
Built 2000 to 2009	1,937	20.7%	1,867	22.0%	70	7.9%
Built 1990 to 1999	1,153	12.3%	1,097	13.0%	56	6.3%
Built 1980 to 1989	859	9.2%	771	9.1%	88	9.9%
Built 1970 to 1979	1,451	15.5%	1,331	15.7%	120	13.5%
Built 1960 to 1969	956	10.2%	858	10.1%	98	11.0%
Built 1950 to 1959	1,011	10.8%	827	9.8%	184	20.7%
Built 1940 to 1949	293	3.1%	260	3.1%	33	3.7%
Built 1939 or earlier	1,092	11.7%	909	10.7%	183	20.6%

Source: U.S. Census Bureau, Urban Partners

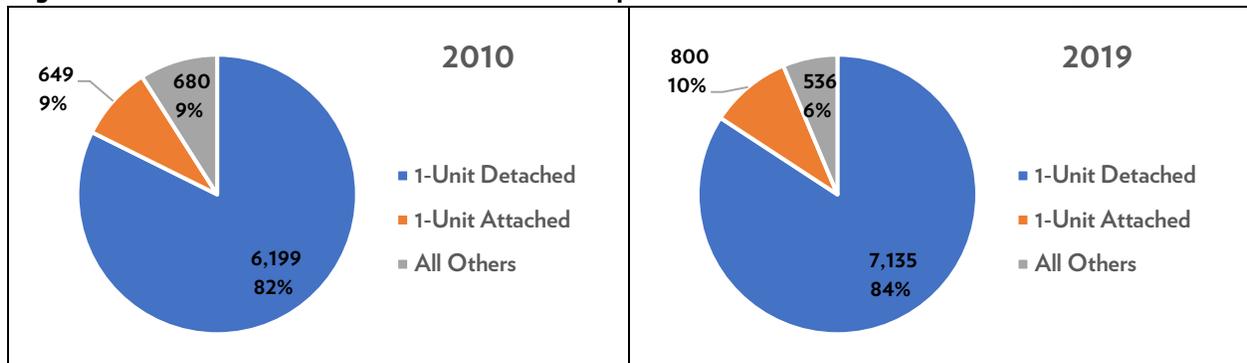
A majority of homes in the Central Submarket (91.3%) are one-unit structures—both attached and detached types (see Table 29 shown on the following page). According to the 2019 ACS, 93.7% of the homeowners live in residential structures with just one unit (see Figure 19 shown on the following page). The largest segment of renter households resides in single-family detached structures (51.3%) but compared to homeowners, they are more evenly distributed in terms of units in structure. Mobile homes make up 6.1% of the overall housing stock in the Central Submarket.

Table 29: Units in Structure by Tenure, Central Submarket, 2019

	All Units		Owner-Occupied		Renter-Occupied	
	Units	%	Units	%	Units	%
1 Unit, detached	7,592	81.1%	7,135	84.2%	457	51.3%
1 Unit, attached	950	10.1%	800	9.4%	150	16.9%
2 Units	89	1.0%	14	0.2%	75	8.4%
3 or 4 Units	54	0.6%	-	-	54	6.1%
5 to 9 Units	17	0.2%	-	-	17	1.9%
10 to 19 Units	58	0.6%	-	-	58	6.5%
20 to 49 Units	0	0.0%	-	-	0	0.0%
50 or more Units	14	0.1%	-	-	14	1.6%
Mobile home	572	6.1%	507	6.0%	65	7.3%
Boat, RV, van, etc.	15	0.2%	15	0.2%	-	-

Source: U.S. Census Bureau, Urban Partners

Figure 19: Distribution of Units in Owner-Occupied Structures, Central Submarket, 2010-2019



Source: U.S. Census Bureau, Urban Partners

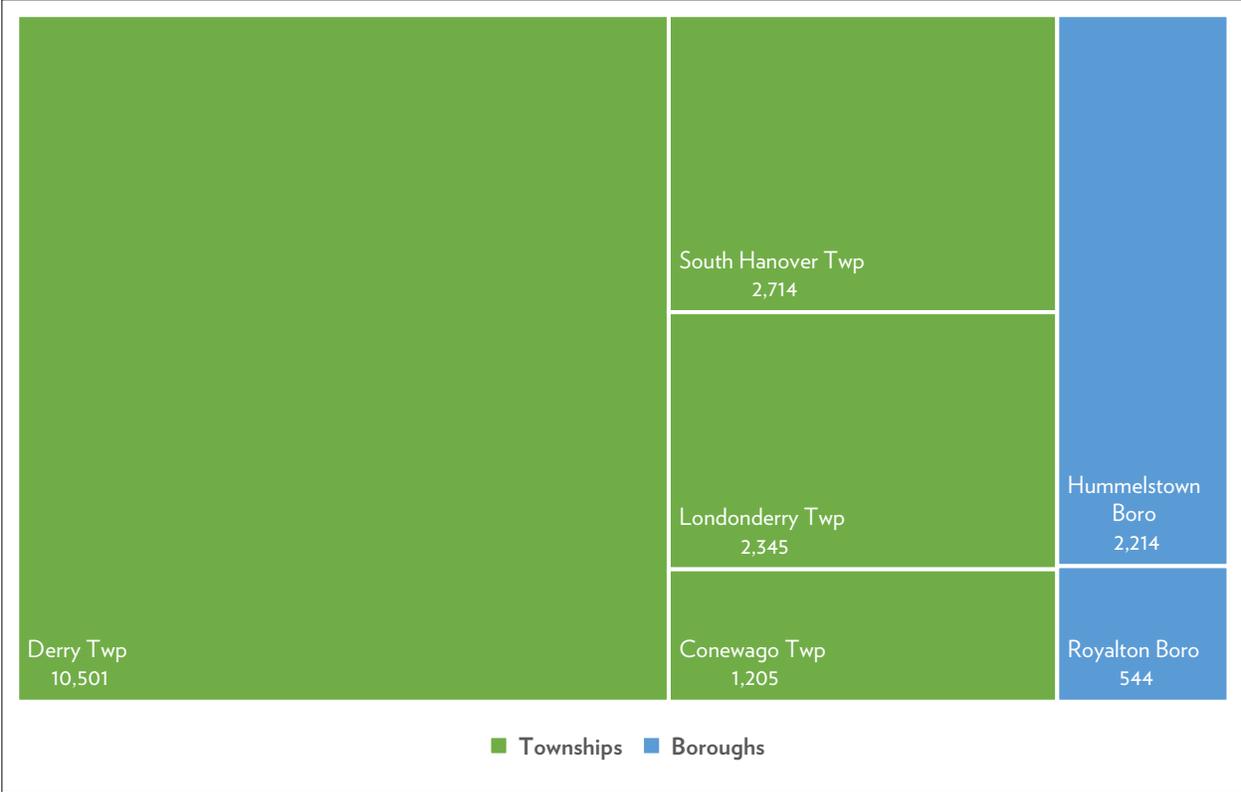
Income-Restricted Communities in the Central Submarket

As of 2019, there are no income-restricted communities located in the Central Submarket.

Housing Supply Analysis – Southeast Submarket

The Southeast Submarket and its six jurisdictions represent 15.7% of the total County’s housing supply. Figure 20 illustrates the distribution of the Southeast Submarket housing supply by jurisdiction. Derry Township reports the largest supply among the four townships with 10,501 housing units, while Hummelstown Borough and Royalton Borough report 2,214 units and 544 units, respectively.

Figure 20: Number of Housing Units by Jurisdiction, Southeast Submarket, 2019



Source: U.S. Census Bureau, Urban Partners

From 2010 to 2019, the total number of housing units in the Southeast Submarket grew by 2.4%. The vacancy rate decreased by 2.7%, reporting 5.4% (1,060 units) in 2019 compared to 8.1% (1,545 units) in 2010 (see Table 30).

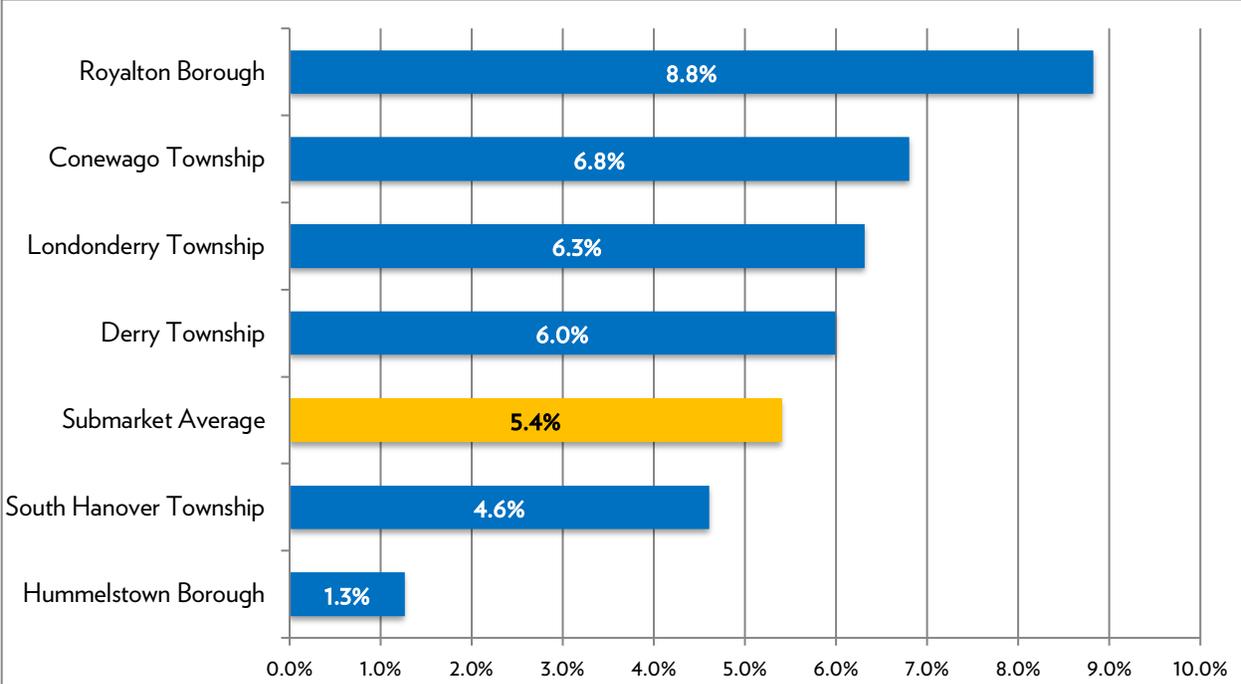
Table 30: Total Housing Units and Occupancy Status, Southeast Submarket, 2010-2019

	2010 ACS	%	2019 ACS	%	Change 2010-2019	% Change 2010-2019
Total Housing Units	19,067	-	19,523	-	456	2.4%
Occupied Units	17,522	91.9%	18,463	94.6%	941	5.4%
Vacant Units	1,545	8.1%	1,060	5.4%	-485	-31.4%

Source: U.S. Census Bureau, Urban Partners

Of the six jurisdictions that comprise the Southeast Submarket, Royalton Borough reports the highest housing vacancy rate of 8.8%, followed by Conewago Township (6.8%) and Londonderry Township (6.3%). The jurisdiction with the lowest housing vacancy rate is Hummelstown Borough with 1.3% (see Figure 21).

Figure 21: Vacancy Rates by Jurisdiction, Southeast Submarket, 2019



Source: U.S. Census Bureau, Urban Partners

The 2019 ACS specifies that in the Southeast Submarket, 32.5% of the vacant units were for rent, while another 11.1% were rented, not occupied (see Table 31). Despite the overall drop in the number of vacant units and the vacancy rate, the “other vacant” category increased, from 400 units in 2010 (25.9%) to 479 units in 2019 (45.2%).

Table 31: Vacancy Status, Southeast Submarket, 2010-2019

	2010 ACS	%	2019 ACS	%	Change 2010-2019	% Change 2010-2019
Total	1,545	-	1,060	-	-485	-31.4%
For rent	304	19.7%	345	32.5%	41	13.5%
Rented, not occupied	179	11.6%	118	11.1%	-61	-
For sale only	226	14.6%	24	2.3%	-202	-89.4%
Sold, not occupied	230	14.9%	37	3.5%	-193	-83.9%
For seasonal use	206	13.3%	57	5.4%	-149	-72.3%
For migrant workers	0	0.0%	0	0.0%	0	-
Other vacant	400	25.9%	479	45.2%	79	19.8%

Source: U.S. Census Bureau, Urban Partners

Table 32 describes changes in tenure, or owner/renter characteristics for the Southeast Submarket. The total number of occupied housing units increased by 941 from 2010 to 2019, and a slight majority (555 unit or 60.0%) of the additional units were owner-occupied homes. The rate of homeownership dipped slightly from 69.6% in 2010 to 69.1% in 2019.

Table 32: Housing Tenure, Southeast Submarket, 2010-2019

	2010 ACS	%	2019 ACS	%	Change 2010-2019	% Change 2010-2019
Total Occupied Units	17,522	-	18,463	-	941	5.4%
Owner-Occupied Units	12,203	69.6%	12,758	69.1%	555	4.5%
Renter-Occupied Units	5,319	30.4%	5,705	30.9%	386	7.3%

Source: U.S. Census Bureau, Urban Partners

A detailed breakdown of the age of housing stock by tenure for the Southeast Submarket is shown in Table 33 below. It shows that approximately a quarter of all housing units in the Southeast Submarket were built before 1960. The U.S. Census Bureau also reports that owner-occupied homes are slightly newer than renter-occupied homes (33.3% of the owner-occupied housing were built in 1990 or later, compared to 27.2% of renter-occupied homes). Of the 18,463 occupied housing units in the Southeast Submarket, 16.2% (2,998 units) were built in 2000 or later.

Table 33: Age of Housing Stock by Tenure, Southeast Submarket, 2019

	All Units	%	Owner- Occupied	%	Renter- Occupied	%
Built 2014 or later	170	0.9%	144	1.1%	26	0.5%
Built 2010 to 2013	484	2.6%	291	2.3%	193	3.4%
Built 2000 to 2009	2,344	12.7%	1,731	13.6%	613	10.7%
Built 1990 to 1999	2,806	15.2%	2,088	16.4%	718	12.6%
Built 1980 to 1989	2,378	12.9%	1,662	13.0%	716	12.6%
Built 1970 to 1979	3,026	16.4%	2,058	16.1%	968	17.0%
Built 1960 to 1969	2,203	11.9%	1,486	11.6%	717	12.6%
Built 1950 to 1959	2,045	11.1%	1,546	12.1%	499	8.7%
Built 1940 to 1949	810	4.4%	492	3.9%	318	5.6%
Built 1939 or earlier	2,197	11.9%	1,260	9.9%	937	16.4%

Source: U.S. Census Bureau, Urban Partners

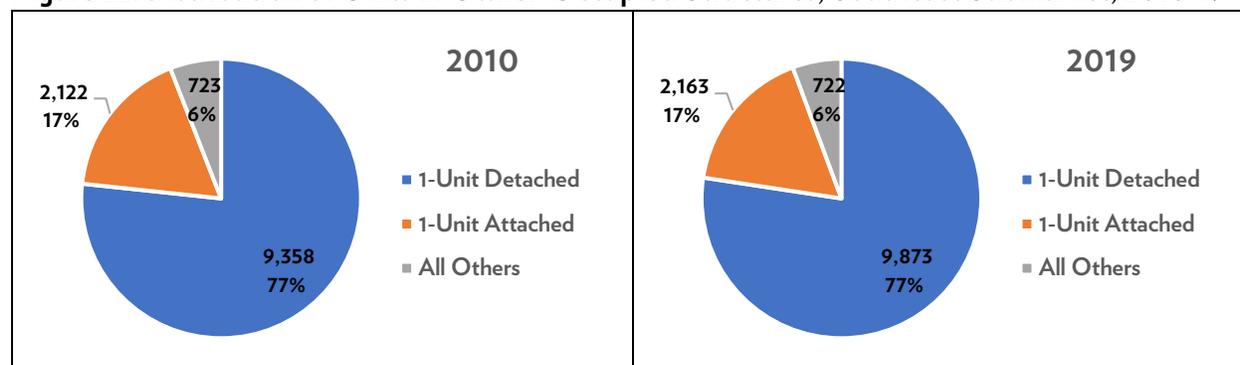
A majority of homes in the Southeast Submarket (77.8%) are one-unit structures—both attached and detached types (see Table 34 shown on the following page). According to the 2019 ACS, 94.3% of the homeowners live in residential structures with just one unit (see Figure 22 shown on the following page). The largest segment of renter households resides in single-family detached structures (18.4%) but compared to homeowners, they are more evenly distributed in terms of units in structure. Mobile homes make up 3.6% of the overall housing stock in the Southeast Submarket.

Table 34: Units in Structure by Tenure, Southeast Submarket, 2019

	All Units		Owner-Occupied		Renter-Occupied	
	Units	%	Units	%	Units	%
1 Unit, detached	10,920	59.1%	9,873	77.4%	1,047	18.4%
1 Unit, attached	3,445	18.7%	2,163	17.0%	1,282	22.5%
2 Units	717	3.9%	73	0.6%	644	11.3%
3 or 4 Units	641	3.5%	60	0.5%	581	10.2%
5 to 9 Units	940	5.1%	61	0.5%	879	15.4%
10 to 19 Units	420	2.3%	22	0.2%	398	7.0%
20 to 49 Units	225	1.2%	0	0.0%	225	3.9%
50 or more Units	496	2.7%	0	0.0%	496	8.7%
Mobile home	659	3.6%	506	4.0%	153	2.7%
Boat, RV, van, etc.	0	0.0%	0	0.0%	0	0.0%

Source: U.S. Census Bureau, Urban Partners

Figure 22: Distribution of Units in Owner-Occupied Structures, Southeast Submarket, 2010-19



Source: U.S. Census Bureau, Urban Partners

Income-Restricted Communities in the Southeast Submarket

Table 35 is a detailed list of the three income-restricted communities in the Southeast Submarket that total 325 units. These units currently represent approximately 6% of the total rental market. HUD Multi-Family units total 265 units, followed by 60 Low-Income Housing Tax Credit units.

Table 35: List of Income-Restricted Communities, Southeast Submarket

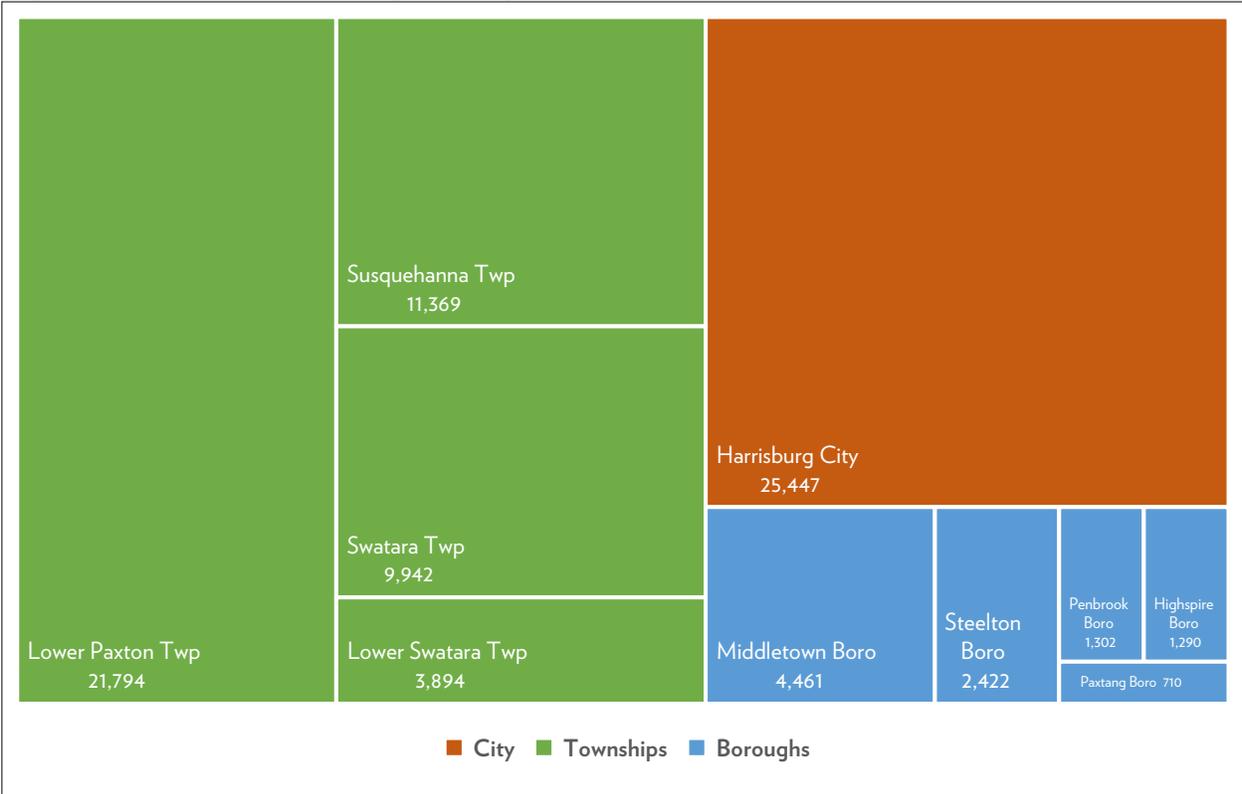
	Name	Address	Type	Subsidized Units	Earliest Expiration Date
1	Hershey Plaza	Derry Township	HUD MF	215	2037
2	Hummelstown Manor	Hummelstown Borough	HUD MF	50	2038
3	Willow Ridge	Derry Township	LIHTC	60	2029

Source: HUD, PolicyMap, Urban Partners

Housing Supply Analysis – Southwest Submarket

The Southwest Submarket and its ten jurisdictions represent 66.5% of the total County’s housing supply. Figure 23 illustrates the distribution of the Southwest Submarket housing supply by jurisdiction. The City of Harrisburg reports the largest supply in the Submarket with 25,447 units, followed by Lower Paxton Township (21,794 units) and Susquehanna Township (11,369 units). Middletown Borough is the largest among the five boroughs with 4,461 units.

Figure 23: Number of Housing Units by Jurisdiction, Southwest Submarket, 2019



Source: U.S. Census Bureau, Urban Partners

From 2010 to 2019, the total number of housing units in the Southeast Submarket grew by 3.0% or a total of 2,386 units. The vacancy rate held steady at 10.5%, as the number of vacant homes increased by 205 units (see Table 36).

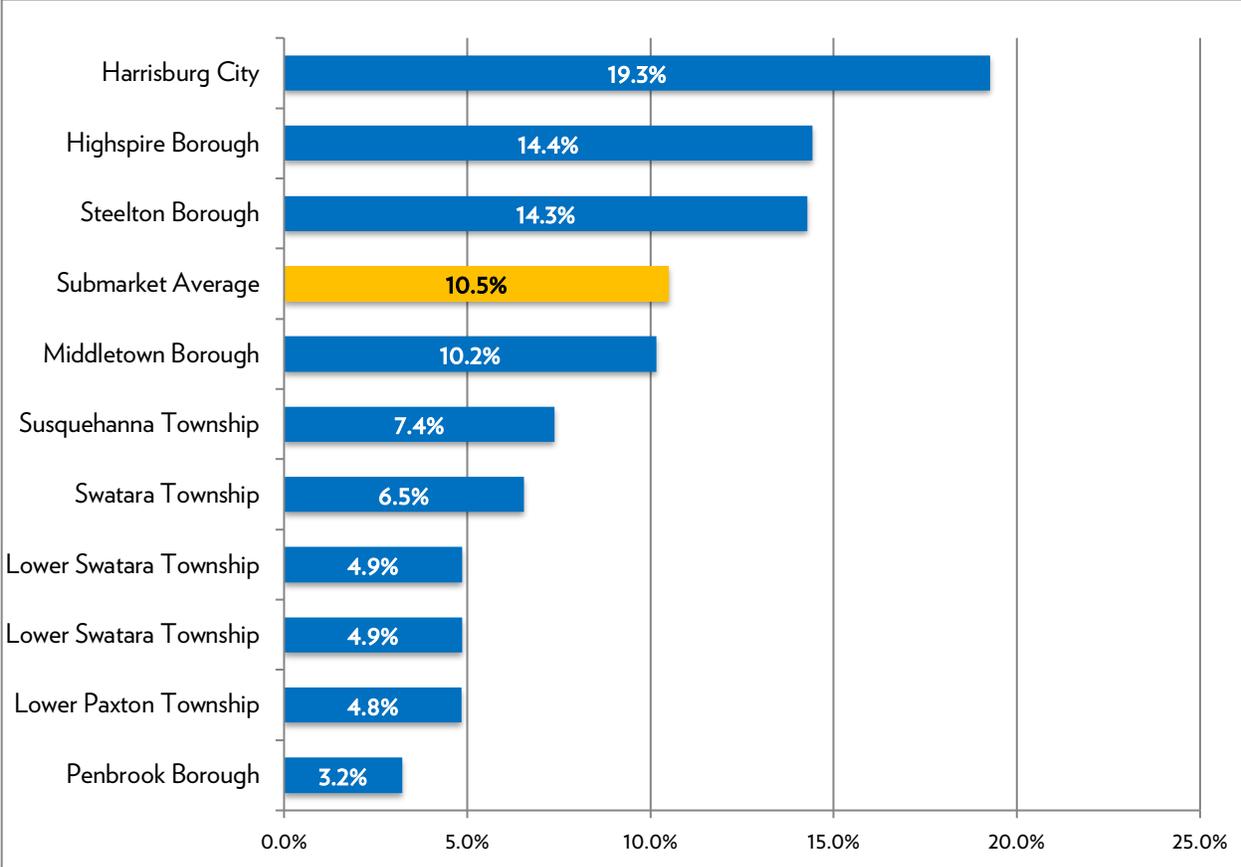
Table 36: Total Housing Units and Occupancy Status, Southwest Submarket, 2010-2019

	2010 ACS	%	2019 ACS	%	Change 2010-2019	% Change 2010-2019
Total Housing Units	80,245	-	82,631	-	2,386	3.0%
Occupied Units	71,762	89.4%	73,943	89.5%	2,181	3.0%
Vacant Units	8,483	10.6%	8,688	10.5%	205	2.4%

Source: U.S. Census Bureau, Urban Partners

Of the ten jurisdictions that comprise the Southwest Submarket, the City of Harrisburg reports the highest housing vacancy rate of 19.3%, followed by Highspire Borough (14.4%) and Steelton Borough (14.3%). The jurisdiction with the lowest housing vacancy rate is Penbrook Borough with 3.2% (see Figure 24).

Figure 24: Vacancy Rates by Jurisdiction, Southwest Submarket, 2019

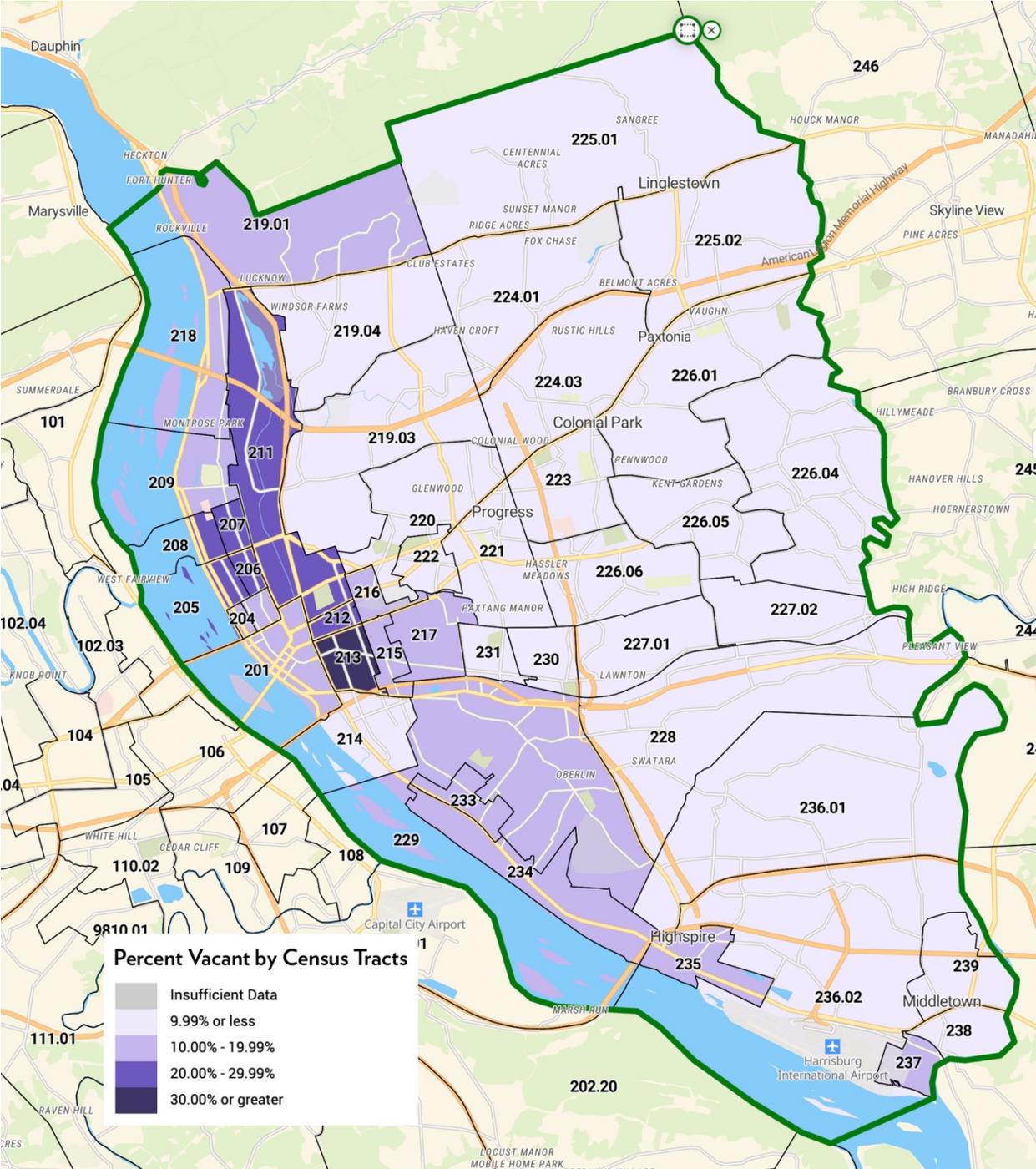


Source: U.S. Census Bureau, Urban Partners

Figure 25 shown on the following page is a map illustrating the housing vacancy rates by census tracts located within the Southwest Submarket. Tracts with the highest vacancy rates are concentrated in the City of Harrisburg, and the following tracts report vacancy rates above the citywide rate of 19.3%:

- Tract 213: 38.0% (1,095 vacant units)
- Tract 206: 26.9% (170 vacant units)
- Tract 208: 24.0% (355 vacant units)
- Tract 207: 24.0% (283 vacant units)
- Tract 211: 22.8% (356 vacant units)
- Tract 212: 21.9% (249 vacant units)
- Tract 205: 20.9% (391 vacant units)

Figure 25: Vacancy Rates by Census Tract, Southwest Submarket, 2019



Source: U.S. Census Bureau, PolicyMap, Urban Partners

The 2019 ACS specifies that in the Southwest Submarket, 24.2% of the vacant units were for rent, while another 9.8% were for sale only (see Table 37 on the following page). Despite maintain the same overall vacancy rate, the “other vacant” category increased significantly, from 1,664 units in 2010 (19.6%) to 4,878 units in 2019 (56.1%).

Table 37: Vacancy Status, Southwest Submarket, 2010-2019

	2010 ACS	%	2019 ACS	%	Change 2010-2019	% Change 2010-2019
Total	8,483	-	8,688	-	205	2.4%
For rent	3,073	36.2%	2,101	24.2%	-972	-31.6%
Rented, not occupied	813	9.6%	233	2.7%	-580	-71.3%
For sale only	1,710	20.2%	848	9.8%	-862	-50.4%
Sold, not occupied	833	9.8%	305	3.5%	-528	-63.4%
For seasonal use	390	4.6%	314	3.6%	-76	-19.5%
For migrant workers	0	0.0%	9	0.1%	9	-
Other vacant	1,664	19.6%	4,878	56.1%	3,214	193.1%

Source: U.S. Census Bureau, Urban Partners

Table 38 describes changes in tenure, or owner/renter characteristics for the Southwest Submarket. The total number of occupied housing units increased by 2,181 from 2010 to 2019, a result of a net increase of 3,774 renter-occupied units and a net loss of 1,593 owner-occupied units. The homeownership rate dropped to 56.6% in 2019, the lowest among the four submarkets.

Table 38: Housing Tenure, Southwest Submarket, 2010-2019

	2010 ACS	%	2019 ACS	%	Change 2010-2019	% Change 2010-2019
Total Occupied Units	71,762	-	73,943	-	2,181	3.0%
Owner-Occupied Units	43,463	60.6%	41,870	56.6%	-1,593	-3.7%
Renter-Occupied Units	28,299	39.4%	32,073	43.4%	3,774	13.3%

Source: U.S. Census Bureau, Urban Partners

Table 39 is a detailed breakdown of the age of housing stock by tenure for the Southwest Submarket. It shows that 44.5% of all housing units in the Southwest Submarket were built before 1960. The 2019 ACS also reports that owner-occupied homes are slightly newer than renter-occupied homes (23.3% of the owner-occupied housing were built in 1990 or later, compared to 18.1% of renter-occupied homes). Of the 73,943 occupied housing units in the Southwest Submarket, 10.3% (7,637 units) were built in 2000 or later.

Table 39: Age of Housing Stock by Tenure, Southwest Submarket, 2019

	All Units	%	Owner- Occupied	%	Renter- Occupied	%
Built 2014 or later	931	1.3%	496	1.2%	435	1.4%
Built 2010 to 2013	1,350	1.8%	682	1.6%	668	2.1%
Built 2000 to 2009	5,356	7.2%	3,505	8.4%	1,851	5.8%
Built 1990 to 1999	7,911	10.7%	5,065	12.1%	2,846	8.9%
Built 1980 to 1989	7,297	9.9%	4,640	11.1%	2,657	8.3%
Built 1970 to 1979	9,602	13.0%	4,481	10.7%	5,121	16.0%
Built 1960 to 1969	8,574	11.6%	4,070	9.7%	4,504	14.0%
Built 1950 to 1959	12,376	16.7%	7,857	18.8%	4,519	14.1%
Built 1940 to 1949	4,918	6.7%	2,891	6.9%	2,027	6.3%
Built 1939 or earlier	15,628	21.1%	8,183	19.5%	7,445	23.2%

Source: U.S. Census Bureau, Urban Partners

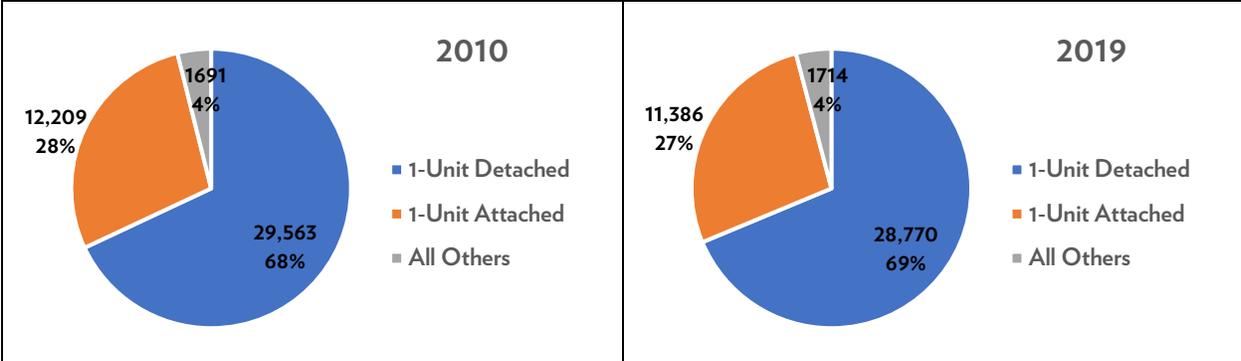
A majority of homes in the Southwest Submarket (69.1%) are one-unit structures—both attached and detached types (see Table 40). According to the 2019 ACS, 95.9% of the homeowners live in residential structures with just one unit (see Figure 26). The largest segment of renter households resides in single-family detached structures (34.1%) but compared to homeowners, they are more evenly distributed in terms of units in structure—including 11.7% that live in structures with 50 or more units. Mobile homes make up 1.2% of the overall housing stock in the Southwest Submarket.

Table 40: Units in Structure by Tenure, Southwest Submarket, 2019

	All Units	%	Owner-Occupied	%	Renter-Occupied	%
1 Unit, detached	31,532	42.6%	28,770	68.7%	2,762	8.6%
1 Unit, attached	19,548	26.4%	11,386	27.2%	8,162	25.4%
2 Units	2,843	3.8%	317	0.8%	2,526	7.9%
3 or 4 Units	5,001	6.8%	242	0.6%	4,759	14.8%
5 to 9 Units	5,216	7.1%	163	0.4%	5,053	15.8%
10 to 19 Units	3,804	5.1%	113	0.3%	3,691	11.5%
20 to 49 Units	1,228	1.7%	18	0.0%	1,210	3.8%
50 or more Units	3,852	5.2%	88	0.2%	3,764	11.7%
Mobile home	906	1.2%	760	1.8%	146	0.5%
Boat, RV, van, etc.	13	0.0%	13	0.0%	0	0.0%

Source: U.S. Census Bureau, Urban Partners

Figure 26: Distribution of Units in Owner-Occupied Structures, Southwest Submarket, 2010-19



Source: U.S. Census Bureau, Urban Partners

Income-Restricted Communities in the Southwest Submarket

Table 41 shown on the following page is a detailed list of the 97 income-restricted communities in the Southwest Submarket that total 4,818 units. These units currently represent approximately 16% of the total rental market. Low-Income Housing Tax Credit units total 1,405 units, followed by 1,182 HUD Multi-Family units.

Table 41: List of Income-Restricted Communities, Southwest Submarket

	Name	Address	Type	Subsidized Units	Earliest Expiration Date
1	120 N 18th St	Harrisburg City	LIHTC	1	2018
2	1211-1219 Hunter Street	Harrisburg City	LIHTC	5	2017
3	1214 Hunter St	Harrisburg City	LIHTC	1	2018
4	1214a Bailey St	Harrisburg City	LIHTC	1	2019
5	1225 Swatara St	Harrisburg City	LIHTC	1	2019
6	124 Balm St	Harrisburg City	LIHTC	1	2019
7	1412 Liberty St	Harrisburg City	LIHTC	1	2019
8	1808 Zarker St	Harrisburg City	LIHTC	1	2019
9	1931-33 N Third St	Harrisburg City	LIHTC	9	2017
10	1933 Holly St	Harrisburg City	LIHTC	1	2017
11	2003 N Third St	Harrisburg City	LIHTC	11	2018
12	2030 Susquehanna St	Harrisburg City	LIHTC	1	2019
13	2120 Penn St	Harrisburg City	LIHTC	1	2018
14	2130 N Fourth St	Harrisburg City	LIHTC	1	2019
15	2141 Penn St	Harrisburg City	LIHTC	1	2019
16	224-228 Locust St	Steelton Borough	LIHTC	3	2018
17	229 Hummel St	Harrisburg City	LIHTC	2	2019
18	23 S 18th St	Harrisburg City	LIHTC	1	2019
19	2426 N Sixth St	Harrisburg City	LIHTC	3	2017
20	2453 Reel St	Harrisburg City	LIHTC	1	2017
21	314-314 A South 14th St	Harrisburg City	LIHTC	5	2024
22	318 S 15th St	Harrisburg City	LIHTC	1	2018
23	332 Boyd St	Harrisburg City	LIHTC	1	2020
24	332 Hamilton St	Harrisburg City	LIHTC	2	2019
25	333 S 13th St	Harrisburg City	LIHTC	17	2018
26	35 N 17th St	Harrisburg City	LIHTC	1	2019
27	408 Crescent St	Harrisburg City	LIHTC	1	2018
28	420-426 Crescent St	Harrisburg City	LIHTC	4	2017
29	432-438 Crescent St	Harrisburg City	LIHTC	4	2017
30	439 Crescent St	Harrisburg City	LIHTC	8	2017
31	446 Crescent St	Harrisburg City	LIHTC	1	2017
32	450 Crescent St	Harrisburg City	LIHTC	1	2018
33	454 Crescent St	Harrisburg City	LIHTC	1	2020
34	464 Crescent St	Harrisburg City	LIHTC	1	2019
35	525 S 16th St	Harrisburg City	LIHTC	1	2019
36	614 Geary St	Harrisburg City	LIHTC	1	2019
37	690 Schuylkill St	Harrisburg City	LIHTC	1	2019
38	87 Disbrow St	Harrisburg City	LIHTC	1	2018
39	96-98 Kempton Ave	Swatara Township	LIHTC	16	2018
40	Allison Hill II	Harrisburg City	LIHTC	27	2023
41	Baldwin Village	Swatara Township	HUD MF	12	2021
42	Bistline House	Swatara Township	Public	80	N/A
43	Chestnut Pointe	Swatara Township	LIHTC	104	2027
44	Cole Crest	Steelton Borough	Public	100	N/A
45	Court At Washington Square	Harrisburg City	LIHTC	100	2043
46	Creekside Village	Lower Paxton Township	HUD MF	14	2021
47	Cumberland Court	Harrisburg City	LIHTC	108	2042

48	Curtin Street	Harrisburg City	LIHTC	1	2018
49	Eastridge Apartments	Swatara Township	HUD MF	106	2037
50	Eastridge Apts	Swatara Township	LIHTC	104	2034
51	Edison Village	Harrisburg City	HUD MF	124	2032
52	Essex House	Middletown Borough	Public	90	N/A
53	Felton Building Apts	Steelton Borough	LIHTC	83	2042
54	Fulton Street	Harrisburg City	LIHTC	1	2018
55	Genesis Court	Middletown Borough	Public	43	N/A
56	Geo A Hoverter Homes	Harrisburg City	Public	233	N/A
57	Governor Hotel Apts	Harrisburg City	LIHTC	46	2023
58	Griffith House	Steelton Borough	Public	40	N/A
59	Harrisburg Park Apts	Harrisburg City	HUD MF	155	2034
60	Highspire School Apts	Highspire Borough	LIHTC	40	2022
61	Hill Cafe	Harrisburg City	LIHTC	27	2020
62	Hillside Village	Harrisburg City	Public	70	N/A
63	Hoy Towers	Swatara Township	Public	100	N/A
64	Hub Veterans Housing (The)	Harrisburg City	LIHTC	20	2048
65	Ivey Lane	Harrisburg City	HUD MF	134	2032
66	Jackson Lick Apts	Harrisburg City	Public	159	N/A
67	Jackson Lick Apts	Harrisburg City	Public	144	N/A
68	John A F Hall Manor	Harrisburg City	Public	538	N/A
69	Lang Manor	Steelton Borough	Public	61	N/A
70	Latsha Towers	Swatara Township	Public	75	N/A
71	Laurel Towers	Harrisburg City	HUD MF	85	2037
72	Linden Terrace	Harrisburg City	HUD MF	123	2034
73	M W Smith Homes	Harrisburg City	Public	80	N/A
74	Market Court	Harrisburg City	LIHTC	12	2031
75	McFarland Apts	Harrisburg City	LIHTC	49	2027
76	Middletown Interfaith Apartments	Middletown Borough	HUD MF	125	2038
77	Morrison Towers	Harrisburg City	Public	120	N/A
78	New Song Village	Swatara Township	HUD MF	20	2021
79	North 18th St	Harrisburg City	LIHTC	1	2018
80	Pheasant Hill	Susquehanna Township	HUD MF	171	2036
81	Pheasant Hill Estate Phase II	Susquehanna Township	LIHTC	48	2031
82	Presbyterian Apts	Harrisburg City	HUD MF	29	2039
83	Ross Street Apts	Harrisburg City	LIHTC	3	2018
84	Rutherford Park	Swatara Township	LIHTC	85	2041
85	Rutherford Park Townhouses	Swatara Township	HUD MF	84	2031
86	Scattered Site	Harrisburg City	Public	79	N/A
87	Springwood Glen At Georgetown Village	Lower Swatara Township	LIHTC	58	2031
88	Sunflower Fields	Susquehanna Township	LIHTC	35	2047
89	Sylvan Heights Mansion	Harrisburg City	LIHTC	44	2028
90	W Howard Day Homes	Harrisburg City	Public	219	N/A
91	Washington Square Apts	Harrisburg City	LIHTC	8	2017
92	Washington Square Apts	Harrisburg City	LIHTC	8	2017
93	Washington Square Apts	Harrisburg City	LIHTC	1	2018
94	Washington Square Apts	Harrisburg City	LIHTC	3	2018
95	Washington Square Apts II	Harrisburg City	LIHTC	100	2024
96	Waterford At Summit View	Swatara Township	LIHTC	130	2029
97	Wilson Street Apts	Middletown Borough	LIHTC	44	2022

Source: HUD, PolicyMap, Urban Partners

5. Special Needs Population

Persons with Disabilities

People with disabilities often encounter many barriers to securing safe and stable housing. The U.S. Census Bureau identifies the following six categories of disabilities:

- Hearing: deaf or had serious difficulty hearing.
- Vision: blind or had serious difficulty seeing even when wearing glasses.
- Cognitive: serious difficulty concentrating, remembering, or making decisions.
- Ambulatory: having serious difficulty walking or climbing stairs.
- Self-Care: difficulty dressing or bathing.
- Independent Living: have difficulty doing errands alone such as visiting a doctor’s office or shopping due to a physical, mental, or emotional condition.

From 2010 to 2019, Dauphin County has seen stable percentages of its population reporting at least one of the above disabilities. In 2019, 12.4% of the county’s civilian noninstitutionalized population had at least one type of disability, down from 12.6% in 2010. Pennsylvania’s disabled population increased from 13.1% in 2010 to 14.0% in 2019 (see Table 42).

Table 42: Disability Status, 2010-2019

	State of Pennsylvania			Dauphin County		
	Total Civilian Population	With a Disability	% with a Disability	Total Civilian Population	With a Disability	% with a Disability
2010	12,506,000	1,638,378	13.1%	264,218	33,310	12.6%
2019	12,587,348	1,759,043	14.0%	272,284	33,781	12.4%

Source: U.S. Census Bureau, Urban Partners

Table 43 summarizes the disability status for Dauphin County by age. According to the 2019 ACS, 44.3% of all Dauphin County seniors 75 years and over are living with at least one disability.

Table 43: Disability Status by Age, 2019

	Total Civilian Population	Population With a Disability	% of Total Population With a Disability
Under 5 years	17,202	56	0.3%
5 to 17 years	44,796	2,811	6.3%
18 to 34 years	59,433	4,285	7.2%
35 to 64 years	106,491	12,989	12.2%
65 to 74 years	26,261	5,614	21.4%
75 years and over	18,101	8,026	44.3%

Source: U.S. Census Bureau, Urban Partners

Table 44 summarizes the six census-defined disabilities by age groups. According to the Census Bureau, 6.6% of Dauphin County residents have ambulatory disabilities, followed by 5.5% with independent living disabilities and 5.0% with cognitive disabilities.

Table 44: Disability Characteristics by Age Groups, 2019

	Under 18		18-64	65 and Older	Total Population with Disabilities	% of County Population with Disabilities
	Under 5	5-17				
Hearing	41	307	2,863	5,358	8,569	3.1%
Vision	29	312	3,042	2,507	5,890	2.2%
Cognitive	2,281		7,389	3,137	12,807	5.0%
Ambulatory	323		7,817	8,788	16,928	6.6%
Self-Care	531		2,442	2,769	5,742	2.3%
Independent Living	-		5,802	5,784	11,586	5.5%

Source: U.S. Census Bureau, Urban Partners

Table 45 shows disability status for residents of the 40 jurisdictions within Dauphin County. As a percentage of their civilian noninstitutionalized population, Lykens Borough, Berrysburg Borough, and Highspire Borough have the highest rate of disabilities—with 20.4%, 19.5%, and 19.5%, respectively. In the City of Harrisburg, 7,611 residents report disabilities, which account for 15.6% of the total civilian population (the column detailing the percentage of residents with a disability is color coded to show the highest percentages in deeper red and the lowest percentages in deeper green).

Table 45: Disability Status by Jurisdiction, 2019

	Total Civilian Population	With a Disability	Percent with a Disability
Berrysburg Borough	339	66	19.5%
Conewago Township	3,078	328	10.7%
Dauphin Borough	774	70	9.0%
Derry Township	25,044	2,436	9.7%
East Hanover Township	5,930	450	7.6%
Elizabethville Borough	1,570	237	15.1%
Gratz Borough	745	82	11.0%
Halifax Borough	989	181	18.3%
Halifax Township	3,500	581	16.6%
Harrisburg City	48,894	7,611	15.6%
Highspire Borough	2,492	485	19.5%
Hummelstown Borough	4,674	453	9.7%
Jackson Township	1,791	183	10.2%
Jefferson Township	319	27	8.5%
Londonderry Township	5,228	805	15.4%
Lower Paxton Township	48,700	4,546	9.3%
Lower Swatara Township	8,806	1,139	12.9%
Lykens Borough	1,807	368	20.4%
Lykens Township	1,696	164	9.7%

Middle Paxton Township	5,057	649	12.8%
Middletown Borough	9,169	1,364	14.9%
Mifflin Township	814	91	11.2%
Millersburg Borough	2,519	417	16.6%
Paxtang Borough	1,726	196	11.4%
Penbrook Borough	2,984	341	11.4%
Pillow Borough	320	42	13.1%
Reed Township	216	26	12.0%
Royalton Borough	1,218	190	15.6%
Rush Township	307	43	14.0%
South Hanover Township	6,797	622	9.2%
Steelton Borough	5,953	991	16.6%
Susquehanna Township	24,765	3,186	12.9%
Swatara Township	22,963	3,026	13.2%
Upper Paxton Township	4,123	605	14.7%
Washington Township	2,190	227	10.4%
Wayne Township	1,336	174	13.0%
West Hanover Township	10,160	903	8.9%
Wiconisco Township	1,054	119	11.3%
Williams Township	1,003	143	14.3%
Williamstown Borough	1,234	214	17.3%

Source: U.S. Census Bureau, Urban Partners

Homelessness

The Point-in-Time (PIT) count is a count of sheltered and unsheltered people experiencing homelessness on a single night in January. HUD requires that Continuums of Care⁵ conduct an annual count of people experiencing homelessness who are sheltered in emergency shelters, transitional housing, and Safe Havens⁶ on a single night. According to the PIT count conducted on January 26, 2022, there were a total of 423 homeless persons, including 64 unsheltered individuals, in Dauphin County (see Table 46).

Table 46: Summary of Homeless Persons in Dauphin County, 2022

	2019	%	2020	%	2021	%	2022	%
Total Persons (Adults & Children)	418		420		358		423	
Unsheltered	48	11.5%	46	11.0%	36	10.1%	64	15.1%
Sheltered	370	88.5%	374	89.0%	322	89.9%	359	84.9%
Emergency Shelter/Hotel	265		256		213		237	
Transitional Housing	83		99		90		113	
Safe Haven	22		19		19		9	

Source: Point-in-Time Report 2022, the Capital Area Coalition on Homelessness

⁵ For Dauphin County, the Capital Area Coalition on Homelessness (CACH)—a voluntary collaborative body comprised of faith-based organizations, local and state governments, foundations, non-profits, businesses, and community members affected by homelessness—oversees the annual HUD Continuum of Care Applications. The CACH is also the lead entity implementing a coordinated plan called “HOME RUN: The Capital Area’s 10-Year Plan to End Homelessness” which was jointly adopted by the City of Harrisburg and Dauphin County.

⁶ Safe Haven is a form of supportive housing that serves hard-to-reach homeless persons with severe mental illness who come primarily from the streets and have been unable or unwilling to participate in housing or supportive services.

Shown in Table 47 below are demographic descriptions of homeless persons in Dauphin County. The 2022 PIT report shows that Dauphin County has 116 homeless children, an increase of 35 children from 2019 to 2022. Furthermore, 38 homeless veterans were counted in 2022, representing a significant increase from the 20 veterans counted in 2019.

Table 47: Demographic Profiles of Homeless Persons in Dauphin County, 2022

	2019	%	2020	%	2021	%	2022	%
Total Unaccompanied Adults	283	67.7%	265	63.1%	245	68.4%	255	60.3%
Total in Households w/ Children	131	31.3%	155	36.9%	113	31.6%	168	39.7%
Adults	50		54		40		52	
Children	81		101		73		116	
Households with Children	46		53		37		46	
Veterans	20		21		40		38	

Source: Point-in-Time Report 2022, the Capital Area Coalition on Homelessness

Finally, Table 48 summarizes the gender and race/ethnicity of homeless individuals, as well as the “chronic homelessness” status. The 2022 PIT report shows that the percentage of homeless women are increasing—186 women in 2022 (44.0%), compared to 141 in 2019 (33.7%). Of the 423 homeless persons counted in the 2022 PIT report, 62 people (14.7%) were categorized as chronically homeless.

Table 48: Demographic Profiles of Homeless Persons in Dauphin County, 2022

	2019	%	2020	%	2021	%	2022	%
Gender								
Female	141	33.7%	170	40.5%	122	34.1%	186	44.0%
Male	277	66.3%	249	59.3%	236	69.9%	231	54.6%
Transgender/Non-Conforming/Questioning	-	-	1	0.2%	-	-	6	1.4%
Race/Ethnicity								
African American	241	57.5%	225	53.6%	183	51.1%	243	57.4%
Caucasian	154	36.8%	148	35.2%	129	36.0%	145	34.3%
Other Race or Multiple Race	23	5.5%	47	11.2%	46	12.8%	35	8.3%
Hispanic/Latin American	64	15.3%	65	15.5%	39	10.9%	33	7.8%
Chronic Homelessness	64	15.3%	39	9.3%	69	19.3%	62	14.7%

Source: Point-in-Time Report 2022, the Capital Area Coalition on Homelessness

Veterans

The Clearinghouse for Military Family Readiness—which is based in the Social Science Research Institute (SSRI) at the Pennsylvania State University—is an interdisciplinary team of research faculty and staff, and creative services professionals committed to providing outstanding support to professionals who provide programs and services to military families. In 2017, the Clearinghouse published a research document called *Supporting United States Veterans: a Review of Veteran-Focused Needs Assessments from 2008-2017*. The report outlines the housing challenges that veterans often experience, including “finding affordable housing, obtaining a mortgage, and needing but not having access to rent or mortgage assistance.” Furthermore, the study found that “homelessness affects approximately one-third of veterans even though veterans comprise only about 2% of the U.S. population.”

The following statement regarding the high incidence of homelessness among veterans is from the National Coalition of Homeless Veterans—a non-profit organization that provides technical assistance for a national network of service providers that assist homeless veterans:

“In addition to the complex set of factors influencing all homelessness—extreme shortage of affordable housing, livable income, and access to health care—a large number of displaced and at-risk veterans live with lingering effects of post-traumatic stress disorder (PTSD) and substance abuse, which are compounded by a lack of family and social support networks. Additionally, military occupations and training are not always transferable to the civilian workforce, placing some veterans at a disadvantage when competing for employment. A top priority for homeless veterans is secure, safe, clean housing that offers a supportive environment free of drugs and alcohol.”

To illustrate the magnitude of potential need among Dauphin County’s veteran population, the following tables in this section summarize the number of veterans as well as their income and disability status. According to the 2019 ACS, 16,945 veterans reside in Dauphin County, representing 8.1% of the county’s total civilian population. The ratio is slightly higher than the state which reports 7.6% of its population as veterans (Table 49).

Table 49: Veteran Status, Population 18 Years and Over, 2019

	Total	Veterans	% Veterans
Pennsylvania	9,760,253	741,115	7.6%
Dauphin County	209,768	16,945	8.1%

Source: U.S. Census Bureau, Urban Partners

Veterans are much more likely to be living with disabilities than non-veterans. According to the 2019 ACS, 3,806 veterans in Dauphin County have disabilities, representing 22.5% of all

veterans in the county. In comparison, non-veterans residing in Dauphin County report disabilities at a rate of 14.0% (Table 50).

Table 50: Veteran/Disability Status, Population 18 Years and Over, 2019

	All Veterans	Veterans with Disabilities	% Veterans with Disabilities	All Non-Veterans	Non-Veterans with Disabilities	% Non-Veterans with Disabilities
Pennsylvania	741,115	218,026	29.4%	9,019,138	1,389,299	15.4%
Dauphin County	16,945	3,806	22.5%	192,823	27,051	14.0%

Source: U.S. Census Bureau, Urban Partners

On the other hand, veterans have a significantly lower rate of poverty than non-veterans. Shown in Table 51, 6.5% of Dauphin County veterans live below the federal poverty rate. In comparison, non-veterans in the county report a poverty rate of 10.3%.

Table 51: Veteran/Poverty Status, Population 18 Years and Over, 2019

	All Veterans	Veterans Below Poverty Level	% Veterans Below Poverty Level	All Non-Veterans	Non-Veterans Below Poverty Level	% Non-Veterans Below Poverty Level
Pennsylvania	741,115	48,511	6.5%	9,019,138	1,031,752	11.4%
Dauphin County	16,945	1,096	6.5%	192,823	19,934	10.3%

Source: U.S. Census Bureau, Urban Partners

Finally, Table 52 summarizes the most vulnerable segment of Dauphin County’s veteran population—those who are disabled and living under the poverty line. According to the 2019 ACS, 1.9% of Dauphin County veterans (322) are disabled and live below the poverty line.

Table 52: Veteran/Poverty/Disability Status, Population 18 Years and Over, 2019

	All Veterans	Veterans Below Poverty Level with Disabilities	% Veterans Below Poverty Level with Disabilities
Pennsylvania	741,115	21,788	2.9%
Dauphin County	16,945	322	1.9%

Source: U.S. Census Bureau, Urban Partners

Table 53 shown on the following page summarizes the number and percentage of veterans in each of the 40 jurisdictions within Dauphin County. The jurisdictions with the most veterans are: Lower Paxton Township (3,453), Harrisburg City (2,235), Swatara Township (1,567), Derry Township (1,550), and Susquehanna Township (1,515). Lastly, the City of Harrisburg and Lower Paxton Township report the highest number of veterans living under the poverty line, with 368 and 212 veterans, respectively.

Table 53: Veteran Disability Status by Jurisdiction, Population 18 Years and Over, 2019

	Civilian Population 18 Years and Over	Veterans	% Veterans	Veterans with Any Disability	Veterans Below Poverty Level
Berrysburg Borough	268	20	7.5%	2	0
Conewago Township	2,378	167	7.0%	39	0
Dauphin Borough	580	45	7.8%	5	0
Derry Township	20,008	1,550	7.7%	411	24
East Hanover Township	4,538	394	8.7%	70	46
Elizabethville Borough	1,278	109	8.5%	51	3
Gratz Borough	591	51	8.6%	27	3
Halifax Borough	723	28	3.9%	10	2
Halifax Township	2,625	287	10.9%	123	0
Harrisburg City	36,036	2,235	6.2%	490	368
Highspire Borough	1,874	150	8.0%	46	13
Hummelstown Borough	3,652	285	7.8%	10	10
Jackson Township	1,441	125	8.7%	23	2
Jefferson Township	264	27	10.2%	2	1
Londonderry Township	4,266	475	11.1%	142	0
Lower Paxton Township	38,893	3,453	8.9%	630	212
Lower Swatara Township	7,369	753	10.2%	220	10
Lykens Borough	1,386	95	6.9%	38	4
Lykens Township	1,076	45	4.2%	5	0
Middle Paxton Township	4,135	344	8.3%	72	0
Middletown Borough	7,396	764	10.3%	147	55
Mifflin Township	514	39	7.6%	12	2
Millersburg Borough	2,117	106	5.0%	23	0
Paxtang Borough	1,288	143	11.1%	29	2
Penbrook Borough	2,166	197	9.1%	29	34
Pillow Borough	230	17	7.4%	3	2
Reed Township	178	25	14.0%	5	0
Royalton Borough	948	56	5.9%	13	5
Rush Township	219	17	7.8%	4	1
South Hanover Township	5,189	291	5.6%	15	15
Steelton Borough	4,044	348	8.6%	110	14
Susquehanna Township	19,460	1,515	7.8%	370	77
Swatara Township	19,254	1,567	8.1%	232	38
Upper Paxton Township	3,373	366	10.9%	151	72
Washington Township	1,713	153	8.9%	41	9
Wayne Township	1,085	63	5.8%	9	0
West Hanover Township	8,131	640	7.9%	141	65
Wiconisco Township	797	87	10.9%	15	3
Williams Township	812	72	8.9%	14	2
Williamstown Borough	987	85	8.6%	27	2

Source: U.S. Census Bureau, Urban Partners

Ex-Offenders

As highlighted in a Prison Policy Initiative’s report titled “Nowhere to Go: Homelessness Among Formerly Incarcerated People,” formerly incarcerated people need to secure safe and affordable places to live before they can re-enter society—address health problems, find stable jobs, or learn new skills. In communities where affordable and attainable housing is in short supply, ex-offenders compete for the same limited resources as the general population who are not encumbered by a criminal history. Consequently, as profiled in national-level research studies, formerly incarcerated individuals experience homelessness ten times higher than the general public.

According to the Pennsylvania Department of Correction’s 2022 Recidivism Report, Dauphin County reports a higher rate of recidivism⁷ than the state average. In a three-year study period examined in the report, a total of 3,097 ex-offenders were released from prison to Dauphin County. For this group of reentering citizens, the rate of recidivism was 68.1%, compared to 63.6% for the state (see Table 54).

Table 54: Three-Year Recidivism Rates, 2022

	# of Releases	Re-Arrest	Re-Incarceration	Recidivism Rate
Dauphin County	3,097	57.7%	48.8%	68.1%
Cumberland County	619	53.8%	44.7%	63.5%
Perry County	259	47.1%	50.6%	64.1%
State of Pennsylvania	79,168	50.5%	46.4%	63.6%

Source: Pennsylvania Department of Corrections, Urban Partners

In 2019, Dauphin County’s Commissioners and the Criminal Justice Advisory Board (CJAB) determined a need to better align the existing Capital Area Ex-Offender Support Coalition (CRESC) and the CJAB to help establish a more collaborative and streamlined approach to community reentry for reentrants. Subsequently, the Dauphin County Reentry Coalition (DCRC) was established, and the 2021-2026 Strategic Plan was prepared. The stated mission of DCRC is “to reduce barriers to service by collaborating with the criminal justice system, human services providers, reentry programs, the reentrant and the community to advocate for policies, procedures and programs that reduce recidivism and result in safer communities.” The following are the four strategy goals outlined in the Strategic Plan:

- Strengthen coalition, increase services capacity.
- Advocate for policy and system changes.
- Educate community, gain buy-in.
- Assist inmates, reentrants, families.

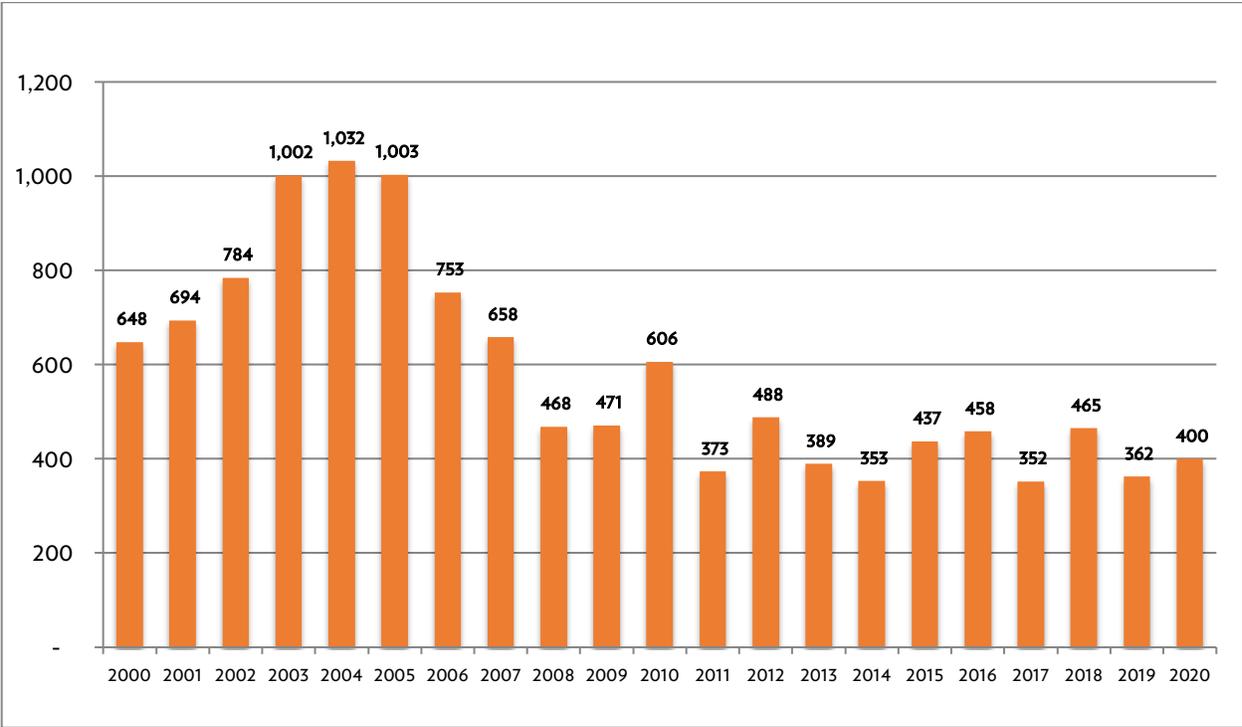
⁷ Pennsylvania’s primary definition of recidivism is the first instance of either re-arrest or re-incarceration to a PA DOC facility after previously being released from PA DOC custody.

6. Home Building Activity

Residential Building Permits Issued in Dauphin County

Figure 27 summarizes the U.S. Department of Housing and Urban Development’s data on the number of authorized single-family residential building permits issued in Dauphin County. From 2000 to 2007, Dauphin County averaged approximately 820 single-family units permitted per year, exceeding 1,000 units from 2003 to 2005. Starting in 2006, the permitting of single-family homes dropped precipitously until hitting an average of approximately 470 units per year during the Great Recession (2008-2009). Subsequently, Dauphin County’s single-family permitting activity has been stuck at approximately 400 units annually.

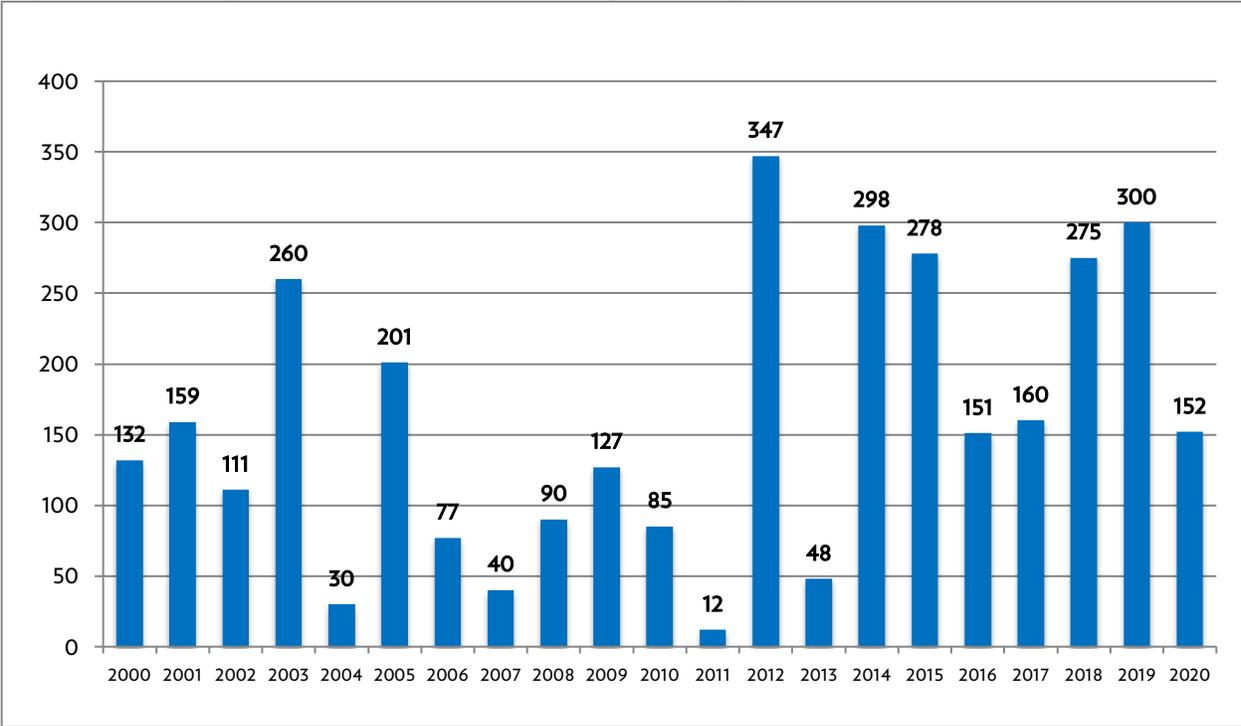
Figure 27: Building Permits Issued (Single-Family Dwellings), 2000-2020



Source: HUD State of the Cities Data Systems (SOCDS), Urban Partners

Figure 28 shown on the following page details Dauphin County’s permitting activity from 2000 to 2020 for multi-family dwellings. From 2000 to 2011 during which a total of 1,324 multi-family units were permitted, and there were no discernible patterns in the permitting activity. The 20-year high of 347 units in 2012 was immediately followed by just 48 units in 2013. From 2014, Dauphin County has been averaging 230 multi-family units annually.

Figure 28: Building Permits Issued (Multi-Family Dwellings), 2000-2020



Source: HUD State of the Cities Data Systems (SOCDS), Urban Partners

Permitting Activity by Jurisdictions

Table 55 shown below and continued on the following page summarizes the building permit activity for each of the 40 jurisdictions located in Dauphin County. Lower Paxton Township issued the most building permits from 2000 to 2020, reporting a total of 3,477 units; followed by West Hanover Township (2,076 units), Susquehanna Township (2,009 units), Swatara Township (1,468 units), Derry Township (1,271 units), and South Hanover Township (1,095 units). Despite the presence of the largest total population among the 40 jurisdictions, the City of Harrisburg issued just 655 building permits (4.2% of the county’s total) during this period.

Table 55: Building Permits Issued by Jurisdiction, 2000-2020

	Units in Multi-Family Structures	Units in Single-Family Structures	Total Units	% of County Total
Lower Paxton Township	566	2,911	3,477	22.4%
West Hanover Township	279	1,797	2,076	13.4%
Susquehanna Township	566	1,443	2,009	12.9%
Swatara Township	338	1,130	1,468	9.5%
Derry Township	146	1,125	1,271	8.2%
South Hanover Township	382	713	1,095	7.1%
Lower Swatara Township	249	457	706	4.5%
City of Harrisburg	248	407	655	4.2%
Middletown Borough	380	86	466	3.0%

East Hanover Township	0	304	304	2.0%
Hummelstown Borough	157	139	296	1.9%
Middle Paxton Township	0	295	295	1.9%
Upper Paxton Township	0	214	214	1.4%
Conewago Township	0	208	208	1.3%
Halifax Township	12	139	151	1.0%
Londonderry Township	0	134	134	0.9%
Jackson Township	0	104	104	0.7%
Wayne Township	0	94	94	0.6%
Royalton Borough	0	84	84	0.5%
Lykens Township	0	80	80	0.5%
Washington Township	0	65	65	0.4%
Mifflin Township	0	50	50	0.3%
Steelton Borough	0	34	34	0.2%
Dauphin Borough	4	26	30	0.2%
Williams Township	0	23	23	0.1%
Lykens Borough	0	23	23	0.1%
Millersburg Borough	6	16	22	0.1%
Penbrook Borough	0	20	20	0.1%
Jefferson Township	0	20	20	0.1%
Reed Township	0	14	14	0.1%
Highspire Borough	0	14	14	0.1%
Gratz Borough	0	9	9	0.1%
Elizabethville Borough	0	7	7	0.0%
Williamstown Borough	0	3	3	0.0%
Rush Township	0	3	3	0.0%
Halifax Borough	0	2	2	0.0%
Berrysburg Borough	0	1	1	0.0%
Wiconisco Township	0	1	1	0.0%
Pillow Borough	0	1	1	0.0%
Paxtang Borough	0	0	0	0.0%
	3,333	12,196	15,529	

Source: HUD State of the Cities Data Systems (SOCDS), Urban Partners

7. For-Sale Housing Market Analysis

Summary of Recently Sold Homes

To analyze recent sales activity for single-family homes and condominiums in Dauphin County, this study utilized the comprehensive record of real estate transactions provided by the Dauphin County Office of Tax Assessment as the primary sources of data. For this analysis, we obtained records of home sales for a 5-year period starting in January 2017 and ending in December 2021.

The median sale price during the 5-year study period was \$153,000, or \$104.09 per square foot, “SF” henceforth). Single-family⁸ is the dominant home type in Dauphin County, representing 93.4% of the sales with a median sale of \$150,000, or \$102.56 per SF. The sale of 1,468 condominiums represented 9.3% of the sales in the county, reporting a median sale price of \$165,000, or \$111.09 per SF (see Table 56).

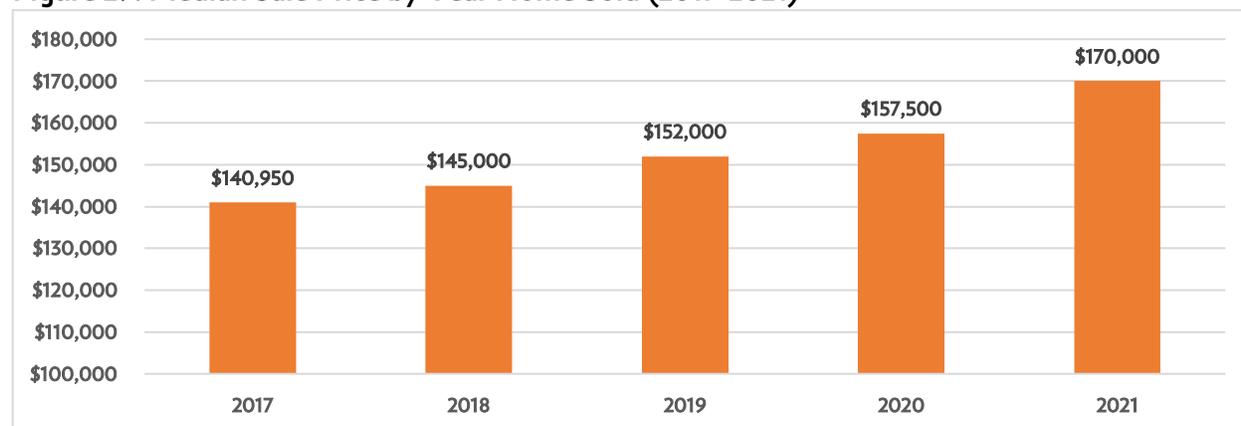
Table 56: Breakdown of Home Sales in Dauphin County (2017-2021)

	No. of Transactions	% of Transactions	Median Sales Price	Median Size (SF)	Median Price Per SF
Single-Family	20,864	93.4%	\$150,000	1,536	\$102.56
Condominiums	1,468	6.6%	\$165,000	1,548	\$111.19
Total	22,332	100.0%	\$153,000	1,540	\$104.09

Source: Dauphin County, Urban Partners

The price of homes in Dauphin County steadily rose during the study period. In 2017, the median sale price for a home located in the county was \$140,950, or \$96.37 per SF. Escalating at an annual rate of 4.8%, the median sale price in 2021 was \$170,000, or \$117.84 per SF (see Figure 29)

Figure 29: Median Sale Price by Year Home Sold (2017-2021)

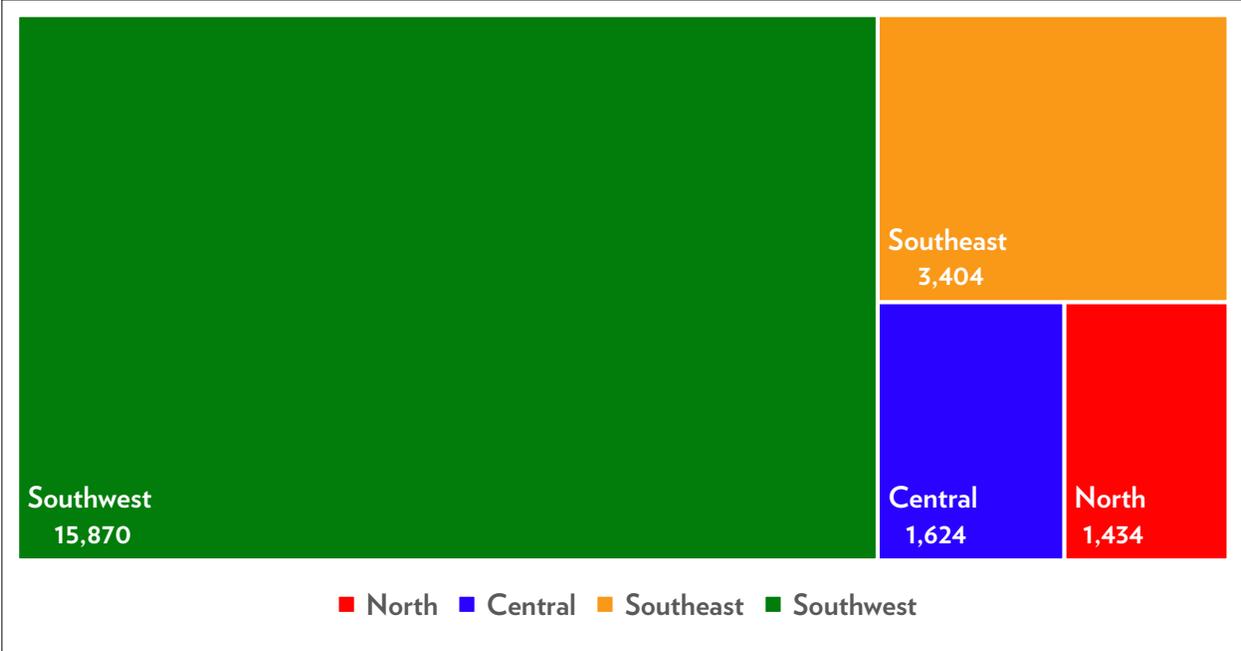


Source: Dauphin County, Urban Partners

⁸ Includes homes that are generally categorized as rowhouses or townhouses.

Figure 30 shows the distribution of the 22,352 sales transactions in Dauphin County by submarkets. The 15,870 sales transactions in the Southwest Submarket represent 71.1% of all sales in the county, followed by Southeast Submarket with 3,404 sales (15.2%), Central Submarket with 1,624 (7.3%), and North Submarket with 1,434 (6.4%).

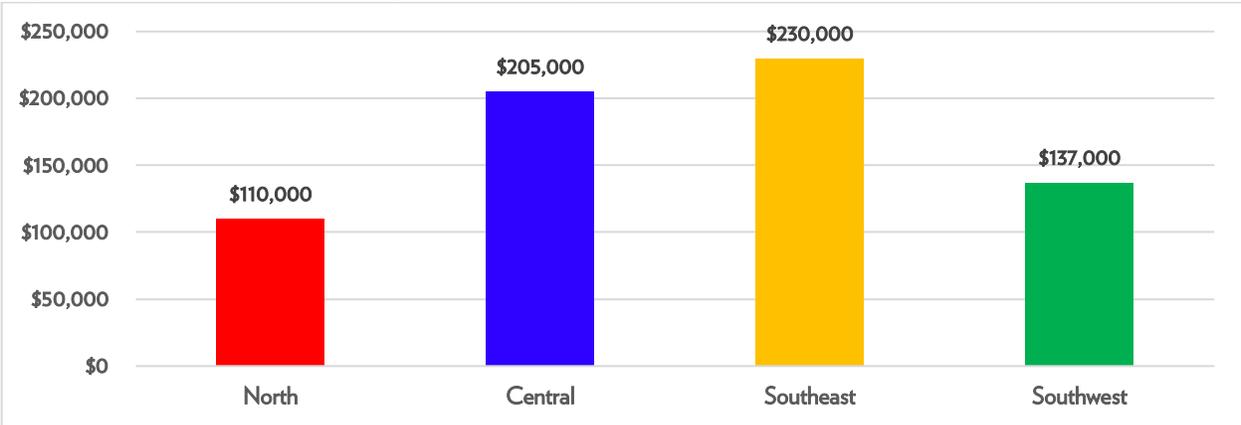
Figure 30: Number of Sales Transactions by Submarkets, 2017-2021



Source: U.S. Census Bureau, Urban Partners

Figure 31 shows the median sale price by submarket for the 5-year study period. The Southeast submarket reported the highest median sale price of \$230,000, followed by the Central Submarket (\$205,000), the Southwest Submarket (\$137,000), and the North Submarket (\$110,000).

Figure 31: Median Sale Price by Submarket (2017-2021)



Source: Dauphin County, Urban Partners

Home Sales in the North Submarket

The North Submarket and its 17 jurisdictions reported a total of 1,434 sales transactions, which account for 6.4% of the county’s total in the 5-year study period. Table 57 shown below summarizes the sales transactions in the North Submarket by the year homes were built. In total, the median sale price for homes sold in the North Submarket in the study period was \$110,000, or \$70.99 per SF. The majority of the homes sold in the North Submarkets were built prior to 1970 (993 transactions, which account for 69.2% of the sales), and the highest median sale price of \$237,250 were reported for homes built between 2000 and 2009.⁹

Table 57: Home Sales in the North Submarket by Age of Homes (2017 to 2021)

	No. of Transactions	Median Sales Price	Price Range	Median Size (SF)	Median Price Per SF
House Built Before 1970	993	\$84,500	\$5,000 to \$365,000	1,499	\$53.62
House Built 1970-1989	236	\$161,250	\$10,000 to \$352,000	1,292	\$114.34
House Built 1990-1999	101	\$190,000	\$30,000 to \$622,000	1,474	\$120.54
House Built 2000-2009	72	\$237,250	\$13,500 to \$550,000	1,742	\$132.22
House Built After 2010	32	\$89,450	\$12,500 to \$383,900	1,806	\$59.49
Total	1,434	\$110,000	\$5,000 to \$622,000	1,472	\$70.99

Source: Dauphin County, Urban Partners

Table 58 below shows the number of transactions by jurisdictions within the North Submarket. Upper Paxton Township reported the most sales transactions with 213, followed by Millersburg Borough with 204, Halifax Borough with 146, and Lykens Borough with 142. In terms of the annual volume of sales, the 342 sales reported in 2021 exceeded the average annual sales for 2017 to 2020 by 24.9%

Table 58: Home Sales in the North Submarket by Jurisdictions (2017 to 2021)

	2017	2018	2019	2020	2021	Total 2017-2021
Berrysburg Borough	6	5	1	4	1	17
Elizabethville Borough	17	16	20	24	28	105
Gratz Borough	10	5	10	2	11	38
Halifax Borough	12	7	9	11	13	52
Halifax Township	29	37	29	23	28	146
Jackson Township	11	15	10	10	16	62
Lykens Borough	35	19	23	24	41	142
Lykens Township	10	6	5	7	10	38
Mifflin Township	4	2	8	3	2	19
Millersburg Borough	42	29	50	38	45	204
Pillow Borough	4	2		4	2	12
Reed Township	3		2	3	2	10
Upper Paxton Township	32	53	51	43	34	213

⁹ There were no condominium transactions recorded in the North Submarket during the 5-year study period.

Washington Township	15	24	17	18	39	113
Wiconisco Township	12	10	13	24	24	83
Williams Township	13	13	13	16	21	76
Williamstown Borough	17	19	14	29	25	104
Total	272	262	275	283	342	1,434

Source: Dauphin County, Urban Partners

Table 59 details the median sale prices for the North Submarket by municipal jurisdictions. From 2017 to 2021, the median sale price increased by 59.8%. In 2021, the highest median sale price of \$330,000 was reported in Reed Township, followed by Jackson Township at \$221,000.

Table 59: Median Sale Price in North Submarket by Jurisdictions (2017 to 2021)

	2017	2018	2019	2020	2021
Berrysburg Borough	\$72,900	\$82,500	\$38,500	\$80,000	\$88,000
Elizabethville Borough	\$115,000	\$76,950	\$96,500	\$117,500	\$140,000
Gratz Borough	\$72,950	\$101,600	\$97,450	\$62,500	\$125,000
Halifax Borough	\$84,500	\$50,000	\$89,900	\$71,000	\$121,900
Halifax Township	\$137,500	\$156,000	\$162,000	\$180,000	\$202,500
Jackson Township	\$142,500	\$204,900	\$181,000	\$126,250	\$221,000
Lykens Borough	\$30,000	\$38,500	\$54,400	\$45,000	\$75,000
Lykens Township	\$110,000	\$120,050	\$150,000	\$164,300	\$201,000
Mifflin Township	\$117,500	\$276,000	\$101,300	\$157,500	\$140,000
Millersburg Borough	\$75,000	\$92,700	\$98,750	\$82,500	\$122,000
Pillow Borough	\$40,802	\$79,000	-	\$78,500	\$144,950
Reed Township	\$145,000	-	\$87,750	\$225,000	\$330,000
Upper Paxton Township	\$110,750	\$126,500	\$124,000	\$149,900	\$169,950
Washington Township	\$145,000	\$142,950	\$165,000	\$187,500	\$190,000
Wiconisco Township	\$70,750	\$47,950	\$55,000	\$89,822	\$85,000
Williams Township	\$50,000	\$80,830	\$131,000	\$72,700	\$129,900
Williamstown Borough	\$33,000	\$55,000	\$42,396	\$55,000	\$79,900
All Jurisdictions	\$85,250	\$105,500	\$110,000	\$101,100	\$136,250

Source: Dauphin County, Urban Partners

Figure 32: Highest Single-Family Sale Prices in the North Submarket



3,768 SF Home in Jackson Twp (Sold for \$622,000)



3,304 SF Home in Halifax Twp (Sold for \$550,000)

Home Sales in the Central Submarket

The Central Submarket and its seven jurisdictions reported a total of 1,624 sales transactions, which account for 7.3% of the county’s total in the 5-year study period. Single-family is the dominant home type in the Central Submarket, representing 92.5% of the sales with a median sale of \$207,500, or \$130.16 per SF. The sale of 121 condominium represented 7.5% of the sales in the Central Submarket, reporting a median sale price of \$191,000, or \$112.13 per SF (see Table 60).

Table 60: Breakdown of Home Sales in the Central Submarket (2017-2021)

	No. of Transactions	% of Transactions	Median Sales Price	Median Size (SF)	Median Price Per SF
Single-Family	1,503	92.5%	\$207,500	1,680	\$130.16
Condominiums	121	7.5%	\$191,000	1,786	\$112.13
Total	1,624	100.0%	\$205,000	1,688	\$125.89

Source: Dauphin County, Urban Partners

Table 61 below shows the number of transactions by jurisdictions within the Central Submarket. West Hanover Township reported more than half of all sales transactions with 897, followed by Middle Paxton Township with 295 and East Hanover Township with 258. In terms of the annual volume of sales, the 378 sales reported in 2021 exceeded the average annual sales for 2017 to 2020 by 21.2%

Table 61: Home Sales in the Central Submarket by Jurisdictions (2017 to 2021)

	2017	2018	2019	2020	2021	Total 2017-2021
Dauphin Borough	14	12	28	18	23	95
East Hanover Township	48	48	54	54	54	258
Jefferson Township	3	3	4	3	-	13
Middle Paxton Township	51	43	67	49	85	295
Rush Township	1	1	2	2	2	8
Wayne Township	9	12	15	11	11	58
West Hanover Township	161	180	177	176	203	897
Total	287	299	347	313	378	1,624

Source: Dauphin County, Urban Partners

Table 62 shown on the following page summarizes the median sale prices for the Central Submarket by municipal jurisdictions. From 2017 to 2021, the median sale price increased by 19.5%, or 4.5% annually. In 2021, the highest median sale price of \$336,600 was reported in Wayne Township, followed by Rush Township at \$255,000.

Table 62: Median Sale Price in Central Submarket by Jurisdictions (2017 to 2021)

	2017	2018	2019	2020	2021
Dauphin Borough	\$120,000	\$165,450	\$168,500	\$150,000	\$147,000
East Hanover Township	\$200,000	\$234,500	\$260,000	\$247,500	\$252,500
Jefferson Township	\$195,000	\$185,000	\$217,500	\$195,000	-
Middle Paxton Township	\$174,000	\$185,000	\$195,000	\$202,400	\$190,000
Rush Township	\$265,000	\$20,000	\$200,500	\$126,950	\$255,000
Wayne Township	\$230,000	\$217,450	\$207,000	\$213,000	\$336,000
West Hanover Township	\$190,000	\$185,000	\$199,900	\$211,500	\$238,500
All Jurisdictions	\$191,500	\$190,000	\$200,000	\$212,000	\$228,800

Source: Dauphin County, Urban Partners

Single Family Sales - Central Submarket

Table 63 shown below summarizes the single-family sales in the Central Submarket by the year homes were built. The majority of the single family homes sold in the Central Submarkets were built prior to 1990 (825 transactions, which account for 50.8% of the sales), and the highest median sale price of \$274,000 were reported for single family homes built between 1990 and 1999.

Table 63: Single Family Sales in the Central Submarket by Age of Homes (2017 to 2021)

	No. of Transactions	Median Sales Price	Price Range	Median Size (SF)	Median Price Per SF
House Built Before 1970	527	\$170,000	\$5,000 to \$1,950,000	1,472	\$112.00
House Built 1970-1989	298	\$216,450	\$6,300 to \$465,000	1,409	\$152.22
House Built 1990-1999	88	\$274,000	\$60,000 to \$750,000	1,961	\$148.69
House Built 2000-2009	405	\$270,000	\$62,455 to \$1,149,000	1,900	\$133.26
House Built After 2010	185	\$217,900	\$25,575 to \$800,000	2,364	\$113.07
Total	1,503	\$207,500	\$5,000 to \$1,950,000	1,680	\$130.16

Source: Dauphin County, Urban Partners

Figure 33: Highest Single-Family Sale Prices in the Central Submarket



**5,550 SF Home in Middle Paxton Twp
(sold for \$1.95 million)**

**6,549 SF Home in East Hanover Twp
(Sold for \$1.149 million)**

Condominium Sales - Central Submarket

Table 64 summarizes the condominium sales in the Central Submarket by jurisdiction. The 24 units located in East Hanover Township sold for a median sale price of \$200,000 (\$119.70 per SF), while the 97 units in West Hanover Township sold for a median sale price of \$187,000 (\$108.17 per SF).

Table 64: Condominium Sales in the Central Submarket by Jurisdiction (2017 to 2021)

	No. of Transactions	Median Sales Price	Price Range	Median Size (SF)	Median Price Per SF
East Hanover Township	24	\$200,000	\$180,000 to \$239,000	1,600	\$119.70
West Hanover Township	97	\$187,000	\$124,300 to \$300,000	1,852	\$108.17
Total	121	\$191,000	\$124,300 to \$300,000	1,786	\$112.13

Source: Dauphin County, Urban Partners

Figure 34: Highest Condominium Sale Prices in the Central Submarket



2,223 SF Condo in West Hanover Twp (Sold for \$300,000) 2,488 SF Condo in West Hanover Twp (Sold for \$271,000)

Home Sales in the Southeast Submarket

The Southeast Submarket and its six jurisdictions reported a total of 3,404 sales transactions, which account for 15.2% of the county’s total in the 5-year study period. Single-family is the dominant home type in the Southeast Submarket, representing 83.9% of the sales with a median sale of \$245,000, or \$141.13 per SF. The sale of 546 condominium represented 16.1% of the sales in the Southeast Submarket, reporting a median sale price of \$203,350, or \$117.07 per SF (see Table 65).

Table 65: Breakdown of Home Sales in the Southeast Submarket (2017-2021)

	No. of Transactions	% of Transactions	Median Sales Price	Median Size (SF)	Median Price Per SF
Single-Family	2,858	83.9%	\$245,000	1,761	\$141.13
Condominiums	546	16.1%	\$203,350	1,690	\$117.07
Total	3,404	100.0%	\$230,000	1,760	\$135.97

Source: Dauphin County, Urban Partners

Table 66 below shows the number of transactions by jurisdictions within the Southeast Submarket. Derry Township reported the most sales transactions with 2,086, followed by South Hanover Township with 553 and Hummelstown Borough with 317. In terms of the annual volume of sales, the 703 sales reported in 2021—though slightly smaller than the 710 in 2019—exceeded the average annual sales for 2017 to 2020 by 4.3%

Table 66: Home Sales in the Southeast Submarket by Jurisdictions (2017 to 2021)

	2017	2018	2019	2020	2021	Total 2017-2021
Conewago Township	28	44	36	27	36	171
Derry Township	389	429	417	411	440	2,086
Hummelstown Borough	65	60	67	57	68	317
Londonderry Township	33	37	48	41	41	200
Royalton Borough	17	15	16	14	15	77
South Hanover Township	111	110	126	103	103	553
Total	643	695	710	653	703	3,404

Source: Dauphin County, Urban Partners

Table 67 shown on the following page summarizes the median sale prices for the Southeast Submarket by municipal jurisdictions. From 2017 to 2021, the median sale price increased by 26.2% or 6.0% annually. In 2021, the highest median sale price of \$300,500 was reported in Derry Township, followed by South Hanover Township at \$240,000.

Table 67: Median Sale Price in Southeast Submarket by Jurisdictions (2017 to 2021)

	2017	2018	2019	2020	2021
Conewago Township	\$202,500	\$262,000	\$192,500	\$295,000	\$234,000
Derry Township	\$249,900	\$227,900	\$250,000	\$265,000	\$300,500
Hummelstown Borough	\$154,500	\$167,000	\$167,800	\$195,000	\$204,500
Londonderry Township	\$140,000	\$165,000	\$181,000	\$200,000	\$226,000
Royalton Borough	\$151,000	\$127,000	\$121,000	\$144,950	\$185,000
South Hanover Township	\$200,000	\$223,500	\$209,950	\$254,710	\$240,000
All Jurisdictions	\$210,000	\$214,000	\$216,400	\$249,900	\$265,100

Source: Dauphin County, Urban Partners

Single Family Sales - Southeast Submarket

Table 68 shown below summarizes the single-family sales in the Southeast Submarket by the year homes were built. Two-thirds (66.3%) of the single family homes sold in the Southeast Submarkets were built prior to 1990 (1,895 transactions), and the highest median sale price of \$343,050 were reported for single family homes built between 2000 and 2009.

Table 68: Single Family Sales in the Southeast Submarket by Age of Homes (2017 to 2021)

	No. of Transactions	Median Sales Price	Price Range	Median Size (SF)	Median Price Per SF
House Built Before 1970	1,242	\$189,450	\$20,000 to \$1,205,000	1,458	\$134.76
House Built 1970-1989	653	\$262,000	\$9,099 to \$950,000	1,728	\$143.13
House Built 1990-1999	381	\$339,500	\$60,000 to \$1,500,000	2,264	\$155.00
House Built 2000-2009	350	\$343,050	\$99,900 to \$1,150,000	2,427	\$146.62
House Built After 2010	202	\$282,750	\$35,000 to \$1,735,000	2,752	\$133.22
Total	2,858	\$245,000	\$9,099 to \$1,735,000	1,761	\$141.13

Source: Dauphin County, Urban Partners

Figure 35: Highest Single-Family Sale Prices in the Southeast Submarket



7,005 SF Home in Derry Twp (Sold for \$1.735 million)



8,959 SF Home in Derry Twp (Sold for \$1.5 million)

Condominium Sales - Southeast Submarket

Table 69 summarizes the condominium sales in the Southeast Submarket by jurisdiction. The 351 units located in Derry Township sold for a median sale price of \$217,500 (\$121.83 per SF), while the 186 units in South Hanover Township sold for a median sale price of \$175,000 (\$111.13 per SF).

Table 69: Condominium Sales in the Southeast Submarket by Jurisdiction (2017 to 2021)

	No. of Transactions	Median Sales Price	Price Range	Median Size (SF)	Median Price Per SF
Conewago Township	7	126,000	\$104,120 to \$153,500	1,260	\$100.00
Derry Township	351	\$217,500	\$90,000 to \$1,150,000	1,833	\$121.83
Hummelstown Borough	2	\$130,500	\$130,000 to \$131,000	1,576	\$92.46
South Hanover Township	186	\$175,000	\$85,000 to \$301,000	1,625	\$111.13
Total	546	\$203,350	\$85,000 to \$1,150,000	1,690	\$117.07

Source: Dauphin County, Urban Partners

Figure 36: Highest Condominium Sale Prices in the Southeast Submarket



Home Sales in the Southwest Submarket

The Southwest Submarket and its ten jurisdictions reported a total of 15,870 sales transactions, which account for 71.1% of the county’s total in the 5-year study period. Single-family is the dominant home type in the Southwest Submarket, representing 94.9% of the sales with a median sale of \$136,000, or \$93.80 per SF. The sale of 801 condominium represented 5.1% of the sales in the Southwest Submarket, reporting a median sale price of \$145,000, or \$108.02 per SF (see Table 70).

Table 70: Breakdown of Home Sales in the Southwest Submarket (2017-2021)

	No. of Transactions	% of Transactions	Median Sales Price	Median Size (SF)	Median Price Per SF
Single-Family	15,069	94.9%	\$136,000	1,499	\$93.80
Condominiums	801	5.1%	\$145,000	1,364	\$108.02
Total	15,870	100.0%	\$137,000	1,493	\$95.78

Source: Dauphin County, Urban Partners

Table 71 below shows the number of transactions by jurisdictions within the Southwest Submarket. City of Harrisburg reported the most sales transactions with 4,514, followed by Lower Paxton Township with 4,191, Susquehanna Township with 2,577, and Swatara Township with 2,005. In terms of the annual volume of sales, the 3,758 sales reported in 2021 exceeded the average annual sales for 2017 to 2020 by 18.2%

Table 71: Home Sales in the Southwest Submarket by Jurisdictions (2017 to 2021)

	2017	2018	2019	2020	2021	Total 2017-2021
City of Harrisburg	673	779	879	996	1,187	4,514
Highspire Borough	50	39	45	56	91	281
Lower Paxton Township	766	824	807	883	911	4,191
Lower Swatara Township	118	137	144	111	136	646
Middletown Borough	109	140	121	123	150	643
Paxtang Borough	29	35	26	27	25	142
Penbrook Borough	42	47	53	63	64	269
Steelton Borough	96	108	82	119	197	602
Susquehanna Township	484	513	481	506	593	2,577
Swatara Township	381	436	387	397	404	2,005
Total	2,748	3,058	3,025	3,281	3,758	15,870

Source: Dauphin County, Urban Partners

Table 72 shown on the following page summarizes the median sale prices for the Southwest Submarket by municipal jurisdictions. From 2017-2021, the median sale price increased by 20.2% or 4.7% annually. In 2021, the highest median sale price of \$227,000 was reported in Lower Paxton Township, followed by Susquehanna Township at \$191,000.

Table 72: Median Sale Price in Southwest Submarket by Jurisdictions (2017 to 2021)

	2017	2018	2019	2020	2021
City of Harrisburg	\$40,900	\$49,000	\$42,000	\$50,350	\$66,000
Highspire Borough	\$65,000	\$73,000	\$85,000	\$99,925	\$109,900
Lower Paxton Township	\$165,000	\$169,900	\$184,900	\$198,000	\$227,000
Lower Swatara Township	\$151,950	\$145,000	\$159,900	\$155,000	\$176,000
Middletown Borough	\$109,500	\$117,750	\$124,900	\$133,000	\$135,250
Paxtang Borough	\$140,000	\$110,070	\$134,500	\$127,000	\$150,000
Penbrook Borough	\$90,000	\$90,000	\$103,000	\$101,000	\$130,000
Steelton Borough	\$36,000	\$45,000	\$41,350	\$55,500	\$74,600
Susquehanna Township	\$144,460	\$153,000	\$161,000	\$168,500	\$191,000
Swatara Township	\$146,000	\$149,900	\$158,000	\$175,000	\$188,000
All Jurisdictions	\$129,000	\$129,900	\$135,000	\$140,000	\$155,000

Source: Dauphin County, Urban Partners

Single Family Sales - Southwest Submarket

Table 73 shown below summarizes the single-family sales in the Southwest Submarket by the year homes were built. Close to two-thirds (65.1%) of the single-family homes sold in the Southwest Submarkets were built prior to 1970 (9,808 transactions), and the highest median sale price of \$230,000 were reported for single family homes built between 2000 and 2009.

Table 73: Single Family Sales in the Southwest Submarket by Age of Homes (2017 to 2021)

	No. of Transactions	Median Sales Price	Price Range	Median Size (SF)	Median Price Per SF
House Built Before 1970	9,808	\$105,000	\$5,000 to \$900,000	1,423	\$71.02
House Built 1970-1989	2,323	\$187,000	\$10,01500 to \$910,000	1,400	\$122.
House Built 1990-1999	1,153	\$220,000	\$23,000 to \$950,000	1,699	\$123.51
House Built 2000-2009	934	\$230,000	\$18,000 to \$949,900	1,872	\$122.13
House Built After 2010	851	\$158,097	\$5,000 to \$895,000	2,284	\$79.20
Total	15,069	\$136,000	\$5,000 to \$950,000	1,499	\$93.80

Source: Dauphin County, Urban Partners

Figure 37: Highest Single-Family Sale Prices in the Southwest Submarket



6,115 SF Home in Lower Paxton Twp (Sold for \$950,000)



7,352 SF Home in Lower Paxton Twp (Sold for \$949,900)

Condominium Sales - Southwest Submarket

Table 74 summarizes the condominium sales in the Southwest Submarket by jurisdiction. The 480 units located in Hummelstown Borough sold for a median sale price of \$141,950 (\$105.59 per SF), while the highest per square foot sale price in the Southwest Submarket was reported in the City of Harrisburg at \$183.13 per SF (for a median sale price of \$130,000).

Table 74: Condominium Sales in the Southwest Submarket by Jurisdiction (2017 to 2021)

	No. of Transactions	Median Sales Price	Price Range	Median Size (SF)	Median Price Per SF
City of Harrisburg	42	\$130,000	\$31,000 to \$472,500	636	\$183.13
Derry Township	192	\$169,500	\$65,000 to \$350,000	1,384	\$117.37
Hummelstown Borough	480	\$141,950	\$54,679 to \$316,000	1,408	\$105.59
South Hanover Township	87	\$147,000	\$40,000 to \$245,000	1,296	\$104.69
Total	801	\$145,000	\$31,000 to \$472,500	1,364	\$108.02

Source: Dauphin County, Urban Partners

Figure 38: Highest Condominium Sale Prices in the Southwest Submarket



2,135 SF Condo in City of Harrisburg (Sold for \$472,500)



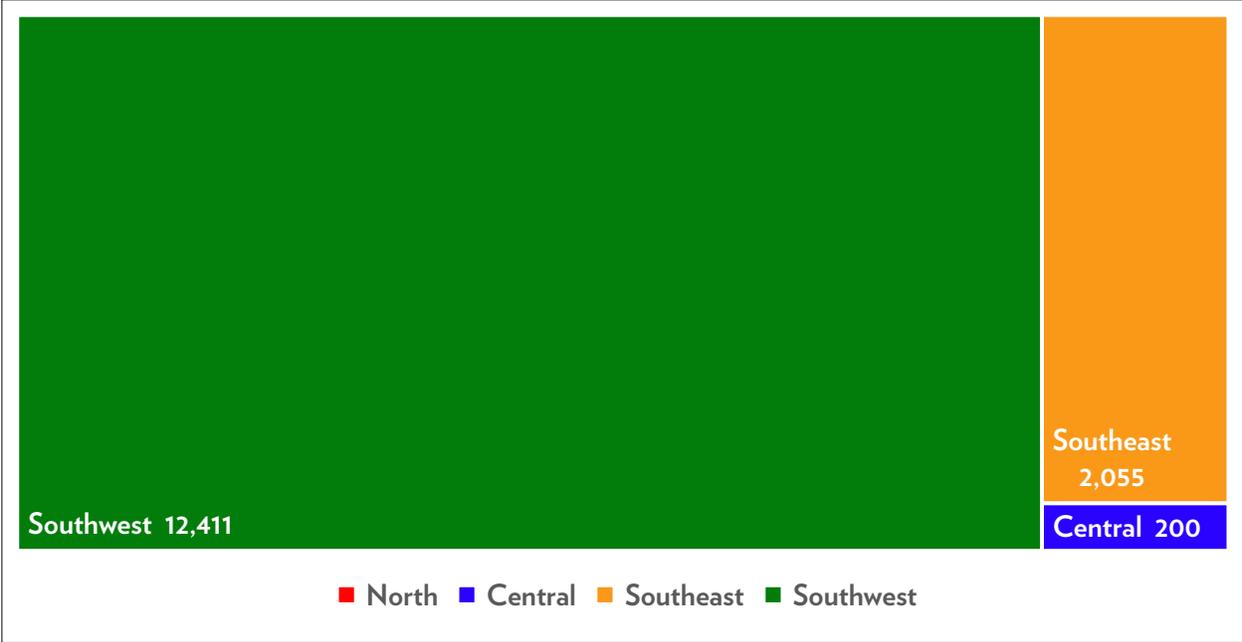
3,014 SF Condo in Lower Paxton Twp (Sold for \$350,000)

8. Rental Housing Market Analysis

To understand the market-rate rental housing market in Dauphin County, Urban Partners examined market conditions for multi-family rental housing complexes of 25 units or greater as well as individual rental units found in smaller apartment buildings and single-family homes (including detached, rowhouses, and townhouses). As with the for-sale market analysis, we have organized this rental housing analysis by County submarkets.

Due to differences in population and development density found throughout the county, certain submarkets have very few or no multi-family complexes. Figure 39 shows the distribution of the 14,666 multi-family units in Dauphin County by submarkets. The 12,411 multi-family units in the Southwest Submarket represent 84.6% of all multi-family units in the county, followed by Southeast Submarket with 2,055 units (14.0%), and Central Submarket with 200 (1.4%). As of June 2022, the North Submarket has no market-rate multi-family apartment complexes with 25 units or more.

Figure 39: Number of Multi-Family Rental Units by Submarkets, June 2022



Source: U.S. Census Bureau, Urban Partners

Rental Housing in the North Submarket

Market-Rate Multi-Family Apartment Complexes

As described above, the North Submarket has no market-rate multi-family apartment complexes with 25 units or more throughout its 17 jurisdictions. There are, however, several income-restricted multi-family complexes in the North Submarket previously identified in Section 4.

Individual Apartment Units

Within the North Submarket, there is just one individual unit available for rent—a single-family house located on Route 209 in Washington Township between Elizabethville and Lykens. The rent is \$1,300 per month for the 2-bedroom home.

Figure 40: Available Individual Home for Rent



6067 Route 209, Washington Twp.

Source: Zillow.com, Urban Partners

Rental Housing in the Central Submarket

Market-Rate Multi-Family Apartment Complexes

The Central Submarket has just one market-rate multi-family apartment complex containing 25 units or more throughout its six jurisdictions. There are, however, several income-restricted multi-family complexes in the Central Submarket previously identified in Section 4. Figure 41 details the complex in terms of key unit/community amenities, total units, and the age of the community.

Figure 41: Rental Housing Complex in the Central Submarket

		<p>The Reserve at Manada Hill 1101 Hoya Avenue, West Hanover</p> <p>Total Units: 200 Built: 2012 Type: 3-Story Mid-Rise</p> <p>Key Unit Amenities:</p> <ul style="list-style-type: none"> • Large kitchens • Walk-in closets • Laundry hookup • Porch/balcony <p>Key Community Amenities:</p> <ul style="list-style-type: none"> • Pool and clubhouse • Fitness center • Dog park • Grilling stations • Car wash area

Source: Apartments.com, Apartmentfinder.com, individual complexes, Urban Partners

In Table 75, age, size, rental rate, and occupancy information is summarized for the market-rate apartment complex found in the Central Submarket.

Table 75: Market-Rate Rental Characteristics for Multi-Family Complex in Central Submarket

Name	Address	Year Built	Units	Type	Rent	Size	Rent/SF	Availability (11/21)
The Reserve at Manada Hill	1101 Hoya Avenue, West Hanover	2012	200	1 Bedroom	\$1,280	927 SF	\$1.38	One-bed: 0
				2 Bedroom	\$1,480	1,200 SF	\$1.23	Two-bed: 0

Source: Apartments.com, Apartmentfinder.com, Apartmentguide.com, Rent.com, individual complexes, Urban Partners

The Reserve at Manada Hill, located in West Hanover Township, is a newer complex that was built in 2012. The development contains 200 units, with 927 SF one-bedroom units renting for \$1,280 per month (\$1.38 per SF) and 1,200 SF two-bedroom units renting for \$1,480 per month (\$1.23 per SF). At the time of this research (June 2022), there were no units available for June 1st or starting July 1st.

Individual Apartment Units

Within the Central Submarket, there are currently no individual apartment units available for rent.

Rental Housing in the Southeast Submarket

Market-Rate Multi-Family Apartment Complexes

The Southeast Submarket has nine market-rate multi-family apartment complexes containing 25 units or more throughout its five jurisdictions. Figure 42 details several complexes in terms of key unit/community amenities, total units, and the age of the community to demonstrate the variety that exists throughout the Submarket.

Figure 42: Rental Housing Complex in the Southeast Submarket

		<p>The Reserve and Gardens at Hershey Meadows 201 Osprey Lane, South Hanover Twp.</p> <p>Total Units: 363 Built: 2006 Type: 2-Story Low-Rise & Townhouses</p> <p>Key Unit Amenities:</p> <ul style="list-style-type: none"> • Eat-in kitchens with pantries • In-unit washer/dryers • Walk-in closets • Fireplace <p>Key Community Amenities:</p> <ul style="list-style-type: none"> • Pool, spa, and sauna • Playground • Basketball and tennis courts • Game room
		

		<p>Verde Apartments 308 E. 2nd Street, Hummelstown Bor.</p> <p>Total Units: 132 Built: 2015 Type: 3-Story Mid-Rise</p> <p>Key Unit Amenities:</p> <ul style="list-style-type: none"> • Upscale kitchens • In-unit washer/dryers • Walk-in closets • Porch/balcony/patio <p>Key Community Amenities:</p> <ul style="list-style-type: none"> • Clubhouse and lounge • Fitness center • Business center • Grill and picnic area • Car wash area
		<p>Alpine Heights at Hershey 870 Rhue Haus Lane, Derry Twp.</p> <p>Total Units: 89 Built: 1971 Type: High-Rise</p> <p>Key Unit Amenities:</p> <ul style="list-style-type: none"> • Eat-in kitchens • In-unit washer/dryers • Fireplace • Carpet • Patio/porch/balcony <p>Key Community Amenities:</p> <ul style="list-style-type: none"> • Wooded setting • Walking/hiking trails • Garages
		 

Source: Apartments.com, Apartmentfinder.com, Apartmentguide.com, individual complexes, Urban Partners

In Table 76, shown below, age, size, rental rate, and occupancy information is summarized for all nine market-rate apartment complexes throughout the Southeast Submarket.

Age of Complexes

Almost half of the multi-family rental complexes in the Southeast Submarket—45%—were built after 2000, which is proportionately a newer stock than in the Southwest Submarket. The newest complex as of this report is the View at High Pointe, a brand new 39-unit community in Derry Township that was completed in 2021. Also in Derry, the Residences of Hershey (32 units) was completed in 2017, the next newest complex, while Verde Apartments (132 units) rounded out the decade with construction in 2015. The much larger Reserve and Gardens at Hershey Meadows, with 363 units, was completed in 2006. The late 1990s witnessed the equally large Hershey Heights Apartments, completed in 1998.

While no multi-family construction occurred in the Submarket in the 1980s, three complexes were built in the 1970s, including Townsend Manor (1978), Rosedale Apartments (1972), and Alpine Heights at Hershey (1971) for a total of 345 units. The oldest (and largest) multi-family rental complex in the Submarket is the sprawling 804-unit Briarcrest Gardens Apartments, built in 1968.

Number of Units

Multi-family rental communities in the Southeast Submarket as a whole are similarly as large as the Southwest, with an average size of 228 units. The largest complex in the Submarket by far is Briarcrest Gardens Apartments in Derry Township, with 804 units. The next largest development—The Reserve and Gardens at Hershey Meadows in South Hanover Township—consists of 363 units. The other larger complex in the Submarket, also in Derry, is Hershey Heights Apartments with 340 units. The remaining complexes all have fewer than 200 units, including Rosedale Apartments (160 units) and Verde Apartments (132 units), with the rest all containing fewer than 100 units.

Rents

Rents at multi-family apartment complexes in the Southeast Submarket examined in Table 76 cover a variety of price-points—ranging from \$0.95 to \$2.33 SF. The upper end of this scale can be found at Verde Apartments in Hummelstown, one of the Submarket’s newer communities. Verde Apartments offers one- and two-bedroom apartments. Amenities there include a clubhouse and lounge, fitness center, business center, grill and picnic area, and car wash area. Rents at Verde Apartments currently have the following ranges:

- One-bedroom units: \$1,725 per month (\$2.33 per SF)
- Two-bedroom units: \$2,145 per month (\$2.01 per SF)

The second-highest rents in the Southeast Submarket are at Hershey Heights Apartments, built in 1998, indicating that the newest complexes are not necessarily commanding the highest rents—particularly if there are abundant amenities available. At this complex, those include a pool, fitness center, business center, clubhouse, sundeck with cabanas, tennis and basketball courts, and car washing area. Rents at Hershey Heights currently have the following ranges:

- One-bedroom units: \$1,451 to \$2,017 per month (\$1.73 to \$2.09 per SF)
- Two-bedroom units: \$1,845 to \$2,559 per month (\$1.68 to \$1.95 per SF)
- Three-bedroom units: \$2,291 to \$2,718 per month (\$1.85 to \$1.95 per SF)

Table 76: Market-Rate Rental Characteristics for Multi-Family Complexes in the Southeast Submarket

Name	Address	Municipality	Year Built	Total Units	Type	Price	Size (SF)	\$/SF	Availability (6/22)	Availability (7/22+)
Briarcrest Gardens Apartments	999 Briarcrest Dr.	Derry	1968	804	1 Bedroom	\$865-\$940	650-900 SF	\$1.04 to \$1.33	One-bed: 0	One-bed: 0
					2 Bedroom	\$1,025-\$1,270	970-1,179 SF	\$1.06 to \$1.08	Two-bed: 0	Two-bed: 0
					3 Bedroom	\$1,185-\$1,395	1,243-1,347 SF	\$0.95 to \$1.04	Three-bed: 0	Three-bed: 0
The Reserve and Gardens at Hershey Meadows	201 Osprey Ln.	South Hanover	2006	363	1 Bedroom	\$1,310-\$1,430	768-868 SF	\$1.65 to \$1.71	One-bed: 1	One-bed: 2
					2 Bedroom	\$1,570-\$1,830	1,056-1,500 SF	\$1.22 to \$1.49	Two-bed: 3	Two-bed: 4
					3 Bedroom	\$1,700-\$2,230	1,216-1,872 SF	\$1.19 to \$1.40	Three-bed: 0	Three-bed: 2
Hershey Heights Apartments	2151 Gramercy Pl.	Derry	1998	340	1 Bedroom	\$1,451-\$2,017	840-965 SF	\$1.73 to \$2.09	One-bed: 0	One-bed: 1
					2 Bedroom	\$1,845-\$2,559	1,100-1,310 SF	\$1.68 to \$1.95	Two-bed: 1	Two-bed: 2
					3 Bedroom	\$2,291-\$2,718	1,176-1,470 SF	\$1.85-\$1.95	Three-bed: 0	Three-bed: 0
Rosedale Apartments	199 Cherry Dr.	Derry	1972	160	1 Bedroom	\$1,100	566-590 SF	\$1.86 to \$1.94	One-bed: 0	One-bed: 0
					2 Bedroom	\$1,500-\$1,625	1,070 SF	\$1.40 to \$1.52	Two-bed: 0	Two-bed: 0
Verde Apartments	308 E. 2nd St.	Hummelstown	2015	132	1 Bedroom	\$1,725	739 SF	\$2.33	One-bed: 0	One-bed: 0
					2 Bedroom	\$2,145	1,068 SF	\$2.01	Two-bed: 0	Two-bed: 0
The View at High Pointe	200 High Pointe Dr.	Derry	2021	39	Studio	\$1,075-\$1,245	594-747 SF	\$1.67-\$1.81	Studio: 0	Studio: 0
					1 Bedroom	\$1,515-\$1,540	897-936 SF	\$1.65 to \$1.69	One-bed: 0	One-bed: 1
					2 Bedroom	\$1,710-\$1,735	1,217-1,232 SF	\$1.41	Two-bed: 0	Two-bed: 1
Townsend Manor	160 Townsend Dr.	Hummelstown	1978	96	1 Bedroom	\$1,050	750 SF	\$1.40	One-bed: 0	One-bed: 0
					2 Bedroom	\$1,200-\$1,400	1,000 SF	\$1.20 to \$1.40	Two-bed: 0	Two-bed: 0
Alpine Heights at Hershey	870 Rhue Haus Ln.	Derry	1971	89	1 Bedroom	\$770-\$860	600-900 SF	\$0.96 to \$1.28	One-bed: 0	One-bed: 0
					2 Bedroom	\$1,070-\$1,500	800-1,100 SF	\$1.34 to \$1.36	Two-bed: 0	Two-bed: 1
Residences of Hershey	536 Middletown Rd.	Derry	2017	32	1 Bedroom	\$1,315-\$1,535	831-1,150 SF	\$1.33 to \$1.58	One-bed: 0	One-bed: 0
					2 Bedroom	\$1,665-\$1,775	1,308-1,612 SF	\$1.10 to \$1.27	Two-bed: 0	Two-bed: 1

Source: Apartments.com, Apartmentfinder.com, Apartmentguide.com, individual complexes, Urban Partners

Further demonstrating this notion is the View at High Pointe, completed in 2021. Rents at this brand new complex, which are not the highest in the Submarket, are as follows:

- Studio units: \$1,075 to \$1,245 per month (\$1.67 to \$1.81 per SF)
- One-bedroom units: \$1,515 to \$1,540 per month (\$1.65 to \$1.69 per SF)
- Two-bedroom units: \$1,710 to \$1,735 per month (\$1.41 per SF)

Availability

The Southeast Submarket appears to have an extremely limited availability of multi-family rental housing. At the time of this research (June 2022), a total of five units were available to rent out of 2,055 total units in the nine Submarket multi-family rental communities, representing an overall vacancy rate of 0.2%¹⁰. The Reserve and Gardens at Hershey Meadows in South Hanover Township reported the highest vacancy rate at 1.1% (four units available for rent in June 2022). In terms of unit types available in the Submarket in June 2022, there were no studio units, 1 one-bedroom unit, 4 two-bedroom units, and 0 three-bedroom units.

Individual Apartment Units

Aside from the larger multi-family complexes, there are a variety of individual apartments for rent within the Southeast Submarket (other than in multi-family complexes) available in smaller apartment buildings, detached homes, townhomes, or twins. Most include basic amenities, including in-home washers/dryers, porches or patios, yards, and off-street parking. As of June 2022, there were several such apartments available for rent (see Table 77).

Table 77: Summary of Available Individual Apartments for Rent in the Southeast Submarket

Address	Municipality	Type	Rent	SF	Rent/SF	BR	BA
1711 Stone Creek Drive	Derry	Townhouse	\$3,500	3,350	\$1.04	3	3.0
405 Yorktowne Road	Derry	House	\$3,300	3,600	\$0.92	4	3.0
120 Miller Avenue	Derry	House	\$2,200	1,300	\$1.69	3	2.0
1520 Macintosh Way	Derry	Townhouse	\$1,895	1,560	\$1.21	3	2.5
1016 E. Governor Road	Derry	House	\$1,799	1,248	\$1.44	3	1.0
705 Stag Court	Derry	Townhouse	\$1,750	1,324	\$1.32	2	2.0
403 Middletown Road	Derry	House	\$1,400	1,530	\$0.92	3	1.0
100 S. Hanover Street, Apt.1	South Hanover	Apartment	\$1,350	N/A	N/A	2	1.0
1350 Columbia Drive	Derry	Apartment	\$1,300	900	\$1.44	2	1.0
1105 Peggy Drive, Apt. 5	Derry	Apartment	\$1,250	1,100	\$1.14	2	1.0
20 Center Road, #30	Derry	House	\$850	N/A	N/A	2	1.0

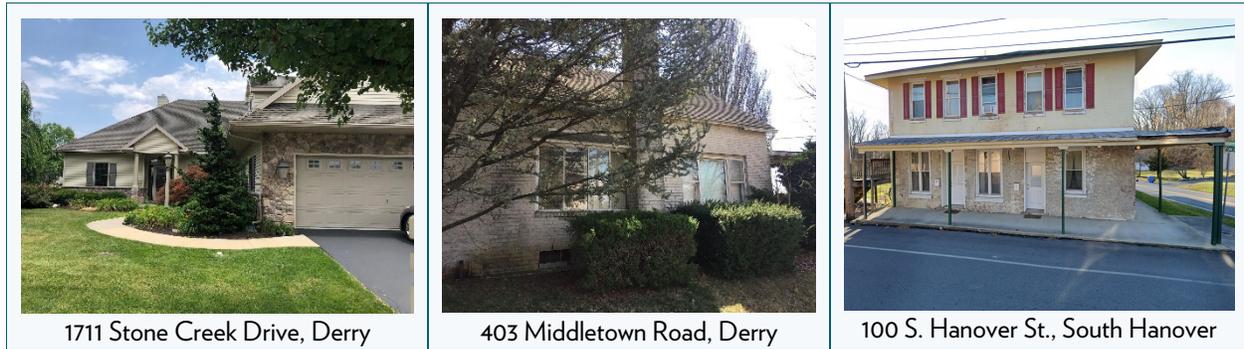
Source: Apartments.com, Zillow.com, Craigslist, Urban Partners

Individual apartment units for rent in the Southeast Submarket as of June 2022 are all two-, three, and four-bedroom units. All are located in Derry Township except for one in South Hanover Township. The highest rent commanded among available units is \$3,500 per month

¹⁰ Includes units available for immediate occupancy or available through June 2022.

for a 3,350 SF three-bedroom townhouse (the second-largest available unit), or \$1.04 per SF. This is one of the lower rents on a square-footage basis among available individual units for rent. More commonly, these apartments range from about \$1.14 to \$1.44 per SF. The lowest rent is \$850 per month for a two-bedroom house.

Figure 43: Sample of Available Individual Apartment Units for Rent



Source: Zillow.com, Urban Partners

Rental Housing in the Southwest Submarket

Market-Rate Multi-Family Apartment Complexes

The Southwest Submarket has 57 market-rate multi-family apartment complexes containing 25 units or more throughout its 10 jurisdictions. Figure 44 details a variety of complexes in terms of key unit/community amenities, total units, and the age of the community to demonstrate the variety that exists throughout the Submarket.

Figure 44: A Sample of the Variety of Rental Housing Complexes in the Southwest Submarket

		<p>Village of Pineford 1900 Pineford Drive, Middletown Twp.</p>
		<p>Total Units: 741 Built: 1972 Type: 2-Story Low-Rise to 5-Story Mid-Rise</p> <p>Key Unit Amenities:</p> <ul style="list-style-type: none"> • Renovated kitchens • In-unit washer/dryers • Walk-in closets • Porch/balcony/patio <p>Key Community Amenities:</p> <ul style="list-style-type: none"> • Pool and clubhouse • Playground • Basketball court • Tennis court • Courtyard



Springford Apartments

6140 Springford Drive, Lower Paxton Twp.

Total Units: 469

Built: 1984

Type: 2-Story Low-Rise

Key Unit Amenities:

- Renovated kitchens
- In-unit washer/dryers
- Walk-in closets
- Porch/balcony/patio

Key Community Amenities:

- Pool, sauna, and clubhouse
- Fitness center
- Basketball and tennis court
- Pet play area
- Walking/biking trails



Towne House Apartments

660 Boas Street, Harrisburg City

Total Units: 360

Built: 1960

Type: High-Rise

Key Unit Amenities:

- Granite countertops
- In-unit washer/dryers
- Walk-in closets
- Porch/balcony

Key Community Amenities:

- Fitness center
- Business center
- Sundeck
- Courtyard
- Picnic area



Pennsylvania Place

301 Chestnut Street, Harrisburg City

Total Units: 286

Built: 1976

Type: High-Rise

Key Unit Amenities:

- Stainless appliances
- Sprinkler system
- Walk-in closets
- Porch/balcony

Key Community Amenities:

- Pool and clubhouse
- Fitness center
- Business center
- Media and entertainment room
- Pet play area



Beaufort Manor Apartments
4112 Beechwood Lane, Susquehanna Twp.

Total Units: 256
Built: 1969
Type: 3-Story Mid-Rise

- Key Unit Amenities:**
- Updated kitchens
 - Carpet
 - Walk-in closets
 - Patio/balcony
- Key Community Amenities:**
- Pool
 - Playground
 - Grill and picnic area
 - Laundry facilities
 - Extra storage



Ivy Ridge Apartments
589 Yale Street, Swatara Twp.

Total Units: 218
Built: 2013
Type: 3-Story Mid-Rise

- Key Unit Amenities:**
- Kitchen islands
 - Hardwood floors
 - Walk-in closets
 - Patio/balcony
- Key Community Amenities:**
- Fitness center
 - Clubhouse
 - Business center
 - Playground
 - Grill and picnic area



Willow Garden Apartments
635 Willow Street, Highspire Bor.

Total Units: 208
Built: 1981
Type: 2-Story Low-Rise

- Key Unit Amenities:**
- Updated kitchens
 - In-unit washer/dryers
 - Walk-in closets
 - Patio/balcony
- Key Community Amenities:**
- Playground
 - Courtyard
 - Additional storage
 - Pet play area



Reserve at Paxton Creek
900 Reserve Way, Susquehanna Twp.

Total Units: 160
Built: 2016
Type: 3-Story Mid-Rise

- Key Unit Amenities:**
- Modern kitchens
 - Washer/dryer hookups
 - Walk-in closets
 - Patio/balcony
- Key Community Amenities:**
- Pool
 - Fitness center
 - Car wash facility
 - Additional storage
 - Pet play area



Woodland Hills Apartments
105 Woodland Avenue, Middletown Bor.

Total Units: 150
Built: 2019
Type: 3-Story Mid-Rise

- Key Unit Amenities:**
- Modern kitchens with pantries
 - In-unit washer/dryers
 - Walk-in closets
 - Carpet and tile floors
 - Balcony
- Key Community Amenities:**
- Fitness center
 - Clubhouse
 - Outdoor courtyard with firepits
 - Pet play area



Twelve Trees Apts. & Townhouses
1200 Summerwood Dr., Lower Paxton Twp.

Total Units: 136
Built: 1974
Type: 2-Story Low-Rise

- Key Unit Amenities:**
- Updated kitchens
 - In-unit washer/dryers
 - Walk-in closets
 - Hardwood floors
 - Balcony/patio
- Key Community Amenities:**
- Laundry facilities
 - Outdoor courtyard
 - Grill area
 - Pet play area



La Collina Townhomes

2679 Alessandro Blvd., Susquehanna Twp.

Total Units: 117

Built: 1997

Type: 2-Story Low-Rise

Key Unit Amenities:

- Eat-in kitchens
- In-unit washer/dryers
- Walk-in closets
- Vaulted ceilings
- Balcony/patio

Key Community Amenities:

- Playground
- Basketball court
- Grill area
- Pet play area



The Greyco Apartments

115 North Street, Harrisburg City

Total Units: 104

Built: 1938

Type: High-Rise

Key Unit Amenities:

- Updated kitchens
- Built-in bookshelves
- Hardwood floors
- Vintage features
- Balcony/patio

Key Community Amenities:

- Laundry facilities
- Game room
- Sundeck
- Extra storage



Penn Square Apartments

400 S. 30th Street, Penbrook Bor.

Total Units: 70

Built: 1963

Type: High-Rise

Key Unit Amenities:

- Updated kitchens
- Updated bathrooms
- Carpet and tile
- Outside entrances

Key Community Amenities:

- Laundry facilities
- Business center
- Media center/movie theater
- Outdoor space

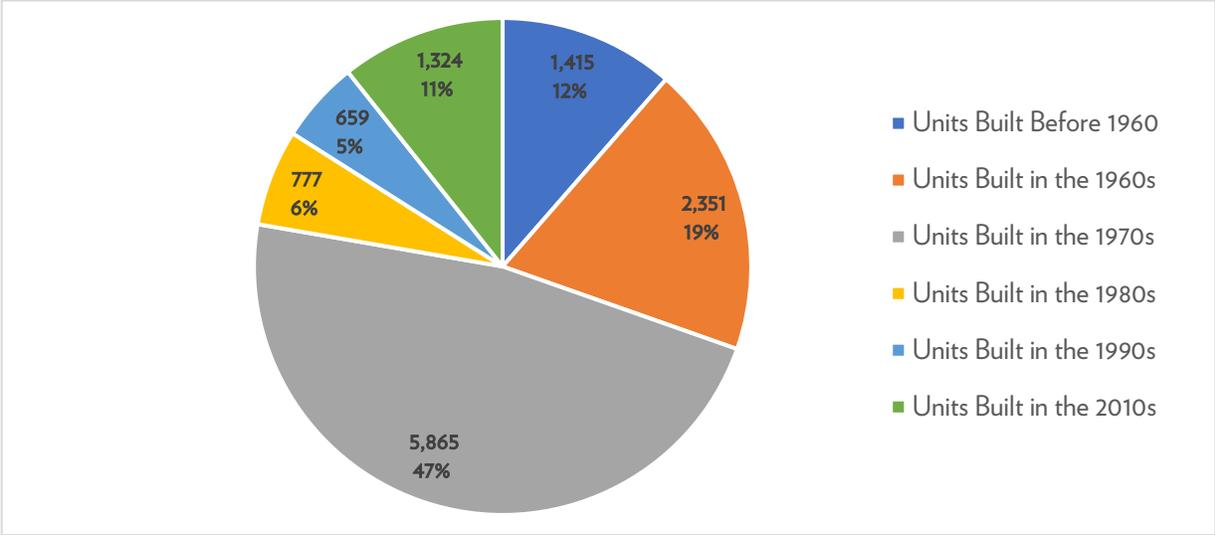
Source: Apartments.com, Apartmentfinder.com, Apartmentguide.com, individual complexes, Urban Partners

In Table 78, shown on the following page, age, size, rental rate, and occupancy information is summarized for all 57 market-rate apartment complexes in the Southwest Submarket.

Age of Complexes

Almost half—5,865 or 47%—of the multi-family rental units in the Southwest Submarket were built in the 1970s (see Figure 45). 19% were built during the 1960s, and another 12% were built prior to 1960, indicating an older stock of multi-family complexes in the Submarket. The oldest complex is the 1910 conversion of Old City Hall in Harrisburg into apartments. While it is the oldest residential building in the Submarket, it was renovated into apartments within the past decade.

Figure 45: Age of Multi-Family Rental Complexes in Southwest Submarket



Source: Apartments.com, Apartmentfinder.com, Apartmentguide.com, individual complexes, Urban Partners

Relatively few units were constructed in the 1980s and ‘90s—6% and 5% respectively—while none were built in the 2000s. However, multi-family housing construction picked back up again in the 2010s in the Southwest Submarket, when 1,324 units were built, or 11% of the stock. The newest complex as of this report is Woodland Hills, a 150-unit complex in Middletown Borough that was completed in 2019. The next newest is the Reserve at Paxton, a 160-unit complex in Susquehanna Township.

Number of Units

Multi-family rental communities in the Southwest Submarket are generally large, with an average size of 217 units. The largest complex in the Submarket is the Village of Pineford Apartments in Middletown Borough, with 742 units. The next largest development—Pennswood Apartments and Townhouses in Lower Paxton Township—consists of 688 units.

Table 78: Market-Rate Rental Characteristics for Multi-Family Complexes in the Southwest Submarket

Name	Address	Municipality	Year Built	Total Units	Type	Price	Size (SF)	\$/SF	Availability (6/22)	Availability (7/22+)
Village of Pineford Apartments	1900 Pineford Dr.	Middletown	1971	742	1 Bedroom	\$915-\$1,085	650-900 SF	\$1.21 to \$1.41	One-bed: 0	One-bed: 1
					2 Bedroom	\$1,020-\$1,255	870-1,184 SF	\$1.06 to \$1.17	Two-bed: 0	Two-bed: 1
					3 Bedroom	\$1,150-\$1,410	1,184-1,390 SF	\$0.97 to \$1.01	Three-bed: 0	Three-bed: 1
Pennswood Apartments and Townhouses	4913 Wynnewood Rd.	Lower Paxton	1972	688	1 Bedroom	\$1,055-\$1,300	770 SF	\$1.37 to \$1.69	One-bed: 0	One-bed: 0
					2 Bedroom	\$1,210-\$1,515	1,000-1,200 SF	\$1.21 to \$1.26	Two-bed: 0	Two-bed: 0
					3 Bedroom	\$1,635-\$1,700	1,400 SF	\$1.17 to \$1.21	Three-bed: 0	Three-bed: 0
Stonebridge	4212 Williamsburg Dr.	Lower Paxton	1964	636	1 Bedroom	\$925-\$1,180	572-708 SF	\$1.62 to \$1.67	One-bed: 0	One-bed: 0
					2 Bedroom	\$1,030-\$1,350	898-1,082 SF	\$1.15 to \$1.25	Two-bed: 0	Two-bed: 0
					3 Bedroom	\$1,375	1,152 SF	\$1.19	Three-bed: 0	Three-bed: 0
Lakewood Hills Apartments	821 Sequoia Dr.	Lower Paxton	1972	550	1 Bedroom	\$1,245-\$1,470	850-940 SF	\$1.46 to \$1.56	One-bed: 0	One-bed: 0
					2 Bedroom	\$1,465-\$1,710	1,250-1,265 SF	\$1.17 to \$1.35	Two-bed: 6	Two-bed: 11
					3 Bedroom	\$1,550	2,100 SF	\$0.74	Three-bed: 10	Three-bed: 8
Twin Lakes Apartments	4405 Union Deposit Rd.	Lower Paxton	1972	490	1 Bedroom	\$875-\$920	675-745 SF	\$1.23 to \$1.30	One-bed: 0	One-bed: 0
					2 Bedroom	\$990-\$1,050	890-925 SF	\$1.11 to \$1.14	Two-bed: 0	Two-bed: 0
Springford Apartments	6140 Springford Dr.	Lower Paxton	1984	469	1 Bedroom	N/A	740-835 SF	N/A	One-bed: 0	One-bed: 0
					2 Bedroom	N/A	1,008-1,108 SF	N/A	Two-bed: 0	Two-bed: 0
					3 Bedroom	N/A	1,214-1,335 SF	N/A	Three-bed: 0	Three-bed: 0
Eagles Crest Apartments	1008 Eaglecrest Ct.	Lower Paxton	1973	468	1 Bedroom	\$1,155-\$1,380	605-729 SF	\$1.89 to \$1.91	One-bed: 7	One-bed: 9
					2 Bedroom	\$1,295-\$1,555	887 SF	\$1.46 to \$1.75	Two-bed: 15	Two-bed: 20
Towne House Apartments	660 Boas St.	Harrisburg	1960	360	Studio	\$900-\$1,120	450-650 SF	\$1.72 to \$2.00	Studio: 5	Studio: 0
					1 Bedroom	\$1,015-\$1,360	650-960 SF	\$1.42 to \$1.56	One-bed: 3	One-bed: 0
					2 Bedroom	\$1,255-\$1,325	1,000-1,150 SF	\$1.15 to \$1.26	Two-bed: 3	Two-bed: 1
The Terraces at Springford	830 N. Highlands Dr.	Lower Paxton	1997	352	1 Bedroom	N/A	828-868 SF	N/A	One-bed: 0	One-bed: 0
					2 Bedroom	N/A	1,058-1,221 SF	N/A	Two-bed: 0	Two-bed: 0
					3 Bedroom	N/A	1,500-2,200 SF	N/A	Three-bed: 0	Three-bed: 0
Aspen Hill Apartments	5069 Stacey Dr. E.	Swatara	1972	324	1 Bedroom	\$1,110-\$1,285	768 SF	\$1.45 to \$1.67	One-bed: 0	One-bed: 1
					2 Bedroom	\$1,125-\$1,415	1,008-1,023 SF	\$1.12 to \$1.38	Two-bed: 0	Two-bed: 1
					3 Bedroom	\$1,350-\$1,525	1,235 SF	\$1.09 to \$1.23	Three-bed: 0	Three-bed: 1
Williamsburg Estates	500 Beacon Dr.	Susquehanna	1974	312	1 Bedroom	\$1,305-\$1,490	700 SF	\$1.86 to \$2.13	One-bed: 1	One-bed: 5
					2 Bedroom	\$1,530-\$1,800	900-1,100 SF	\$1.64 to \$1.70	Two-bed: 0	Two-bed: 7
Pennsylvania Place	301 Chestnut St.	Harrisburg	1976	286	1 Bedroom	\$1,152-\$1,387	607-830 SF	\$1.67 to \$1.90	One-bed: 5	One-bed: 1
					2 Bedroom	\$1,413-\$1,594	830 SF	\$1.70 to \$1.92	Two-bed: 0	Two-bed: 5

The Village of Laurel Ridge - The Encore	399 Ring Neck Rd.	Lower Paxton	1979	279	1 Bedroom	\$1,325-\$1,505	750-770 SF	\$1.77 to \$1.95	One-bed: 1	One-bed: 3
					2 Bedroom	\$1,905-\$1,960	1,007-1,390 SF	\$1.41 to \$1.89	Two-bed: 4	Two-bed: 3
					3 Bedroom	\$2,090-\$2,280	1,164-1,288 SF	\$1.77 to \$1.80	Three-bed: 1	Three-bed: 3
River Plaza Apartments	2311 N. Front St.	Harrisburg	1952	277	Studio	N/A	342 SF	N/A	Studio: 0	Studio: 0
					1 Bedroom	N/A	544 SF	N/A	One-bed: 0	One-bed: 0
					2 Bedroom	N/A	641 SF	N/A	Two-bed: 0	Two-bed: 0
Executive House Apartments	101 S. 2nd St.	Harrisburg	1967	257	Studio	\$1,170-\$1,435	460-657 SF	\$2.18 to \$2.54	Studio: 2	Studio: 0
					1 Bedroom	\$1,315-\$1,435	620-840 SF	\$1.71 to \$2.12	One-bed: 3	One-bed: 0
					2 Bedroom	\$1,725	915-967 SF	\$1.78 to \$1.89	Two-bed: 1	Two-bed: 0
Beaufort Manor Apartments	4112 Beechwood Ln.	Susquehanna	1969	256	Studio	\$1,103-\$1,153	550 SF	\$2.01 to \$2.10	Studio: 0	Studio: 0
					1 Bedroom	\$1,223-\$1,358	785-841 SF	\$1.56 to \$1.61	One-bed: 0	One-bed: 0
					2 Bedroom	\$1,347-\$1,657	1,005-1,101 SF	\$1.34 to \$1.50	Two-bed: 0	Two-bed: 1
					3 Bedroom	\$1,589-\$1,767	1,230 SF	\$1.29 to \$1.44	Three-bed: 0	Three-bed: 0
King's Manor Apartments	2161 Camelot Dr.	Susquehanna	1975	256	2 Bedroom	\$1,410-\$1,455	950 SF	\$1.48 to \$1.53	Two-bed: 0	Two-bed: 0
					3 Bedroom	N/A	1050 SF	N/A	Three-bed: 0	Three-bed: 0
The Pines	301 N. Progress Ave.	Susquehanna	1972	236	1 Bedroom	\$1,068-\$1,118	907-913 SF	\$1.18 to \$1.22	One-bed: 0	One-bed: 7
					2 Bedroom	\$1,505-\$1,586	1,200 SF	\$1.25 to \$1.32	Two-bed: 1	Two-bed: 1
					3 Bedroom	N/A	1500 SF	N/A	Three-bed: 0	Three-bed: 0
Taylor Park Apartments	2751 Wilson Pkwy.	Lower Paxton	1948	230	1 Bedroom	\$732-\$750	500 SF	\$1.46 to \$1.50	One-bed: 0	One-bed: 0
					2 Bedroom	\$872-\$890	900 SF	\$0.97 to \$0.99	Two-bed: 0	Two-bed: 0
Ivy Ridge Apartments	589 Yale St.	Swatara	2013	218	2 Bedroom	\$1,499-\$1,599	911-958 SF	\$1.65 to \$1.67	Two-bed: 1	Two-bed: 1
					3 Bedroom	N/A	1,420 SF	N/A	Three-bed: 0	Three-bed: 0
Riverfront Park Apartments	2500 Green St.	Harrisburg	1956	216	1 Bedroom	N/A	850 SF	N/A	One-bed: 0	One-bed: 0
					2 Bedroom	N/A	1,000 SF	N/A	Two-bed: 0	Two-bed: 0
Treeview Apartments	334 Lopax Rd.	Lower Paxton	1978	210	1 Bedroom	N/A	750 SF	N/A	One-bed: 0	One-bed: 0
					2 Bedroom	N/A	1,058-1,200 SF	N/A	Two-bed: 0	Two-bed: 0
Willow Garden Apartments	635 Willow St.	Highspire	1981	208	1 Bedroom	\$900	900 SF	\$1.00	One-bed: 0	One-bed: 0
					2 Bedroom	\$970	1,008 SF	\$0.96	Two-bed: 0	Two-bed: 0
Village Creek Apartments	100 Joya Cir.	Lower Paxton	1978	204	1 Bedroom	\$1,050	750 SF	\$1.40	One-bed: 0	One-bed: 0
					2 Bedroom	\$1,300	900 SF	\$1.44	Two-bed: 0	Two-bed: 0
Sunpointe Townhomes	7455 Stephen Dr.	Swatara	2011	203	2 Bedroom	\$1,449-\$1,649	1,253-1,609 SF	\$1.02 to \$1.16	Two-bed: 3	Two-bed: 0
					3 Bedroom	\$1,499-\$1,929	1,253-2,000 SF	\$0.96 to \$1.20	Three-bed: 3	Three-bed: 0
Blue Ridge Apartments	1140 Alexandra Ln.	Lower Paxton	2010	184	Studio	\$1,045	567-591 SF	\$1.77 to \$1.84	Studio: 0	Studio: 0
					1 Bedroom	\$1,385	853 SF	\$1.62	One-bed: 0	One-bed: 0
					2 Bedroom	\$1,640-\$1,660	1,218 SF	\$1.35 to \$1.36	Two-bed: 0	Two-bed: 0
Colonial Glen	4900 Lancer St.	Lower Paxton	1974	173	2 Bedroom	\$1,303-\$1,538	950-1,050 SF	\$1.37 to \$1.46	Two-bed: 0	Two-bed: 0

Reserve at Paxton Creek	900 Reserve Wy.	Susquehanna	2016	160	1 Bedroom	\$1,190	927 SF	\$1.28	One-bed: 1	One-bed: 0
					2 Bedroom	\$1,400	1,200 SF	\$1.17	Two-bed: 0	Two-bed: 0
Wedgewood Hills Apartments	3250 Wakefield Rd.	Susquehanna	1955	156	1 Bedroom	\$995-\$1,075	560 SF	\$1.78 to \$1.92	One-bed: 6	One-bed: 3
					2 Bedroom	\$1,205-\$1,300	740 SF	\$1.63 to \$1.76	Two-bed: 4	Two-bed: 2
Woodland Hills Apartments	105 Woodland Ave.	Middletown	2019	150	1 Bedroom	\$1,267-\$1,424	878 SF	\$1.44 to \$1.62	One-bed: 0	One-bed: 4
					2 Bedroom	\$1,449-\$1,691	1,101-1,114 SF	\$1.32 to \$1.52	Two-bed: 0	Two-bed: 3
Whisperwood Apartments	3602 Brookridge Ter.	Susquehanna	1969	148	Studio	\$835-\$900	384-555 SF	\$1.62 to \$2.17	Studio: 0	Studio: 0
					1 Bedroom	\$1,030	766 SF	\$1.34	One-bed: 0	One-bed: 0
					2 Bedroom	\$1,120	1,046 SF	\$1.07	Two-bed: 0	Two-bed: 1
Emerald Pointe Townhomes	1239 Amber Ln.	Swatara	2010	148	2 Bedroom	\$2,035-\$2,640	1,349-1,800 SF	\$1.47 to \$1.51	Two-bed: 0	Two-bed: 1
					3 Bedroom	\$2,325-\$2,650	1,349-1,800 SF	\$1.47 to \$1.72	Three-bed: 1	Three-bed: 2
East Park Gardens Apartments	199 Francis L Cadden Pkwy.	Swatara	1968	144	1 Bedroom	\$860	620 SF	\$1.39	One-bed: 0	One-bed: 0
					2 Bedroom	\$960	760 SF	\$1.26	Two-bed: 0	Two-bed: 0
Paxton Park Apartments	630 Santanna Dr.	Lower Paxton	1965	140	Studio	\$1008-\$1073	557 SF	\$1.81 to \$1.93	Studio: 0	Studio: 0
					1 Bedroom	\$962-\$1454	579 SF	\$1.66 to \$2.51	One-bed: 2	One-bed: 0
					2 Bedroom	\$1470-\$1638	903-1020 SF	\$1.63 to \$1.61	Two-bed: 2	Two-bed: 0
Walnut Crossing Apartments	3300 Union Deposit Rd.	Susquehanna	1972	136	1 Bedroom	\$900	720 SF	\$1.25	One-bed: 0	One-bed: 0
					2 Bedroom	\$1,000	1,013 SF	\$0.99	Two-bed: 0	Two-bed: 0
					3 Bedroom	\$1,200	1,175 SF	\$1.02	Three-bed: 0	Three-bed: 0
Twelve Trees Apartments and Townhouses	1200 Summerwood Dr.	Lower Paxton	1974	136	1 Bedroom	\$1,230	800 SF	\$1.54	One-bed: 0	One-bed: 0
					2 Bedroom	\$1,400-\$1,600	900-1,200 SF	\$1.33 to \$1.56	Two-bed: 0	Two-bed: 0
					3 Bedroom	\$1,800	1,300 SF	\$1.38	Three-bed: 0	Three-bed: 0
Catalina Apartments	4255 Catalina Ln.	Lower Paxton	1974	128	1 Bedroom	\$825	N/A	N/A	One-bed: 0	One-bed: 0
					2 Bedroom	\$925	N/A	N/A	Two-bed: 0	Two-bed: 0
					3 Bedroom	\$1,100	N/A	N/A	Three-bed: 0	Three-bed: 0
Bellevue Towers	2400 Market St.	Harrisburg	1939	126	1 Bedroom	N/A	638 SF	N/A	One-bed: 1	One-bed: 0
					2 Bedroom	N/A	781 SF	N/A	Two-bed: 1	Two-bed: 0
Hamilton Park Apartments	303 Hamilton Cir.	Swatara	1993	122	1 Bedroom	\$1,390	840 SF	\$1.65	One-bed: 0	One-bed: 0
					2 Bedroom	\$1,717-\$1,950	1,080-1,112 SF	\$1.59 to \$1.75	Two-bed: 0	Two-bed: 0
					3 Bedroom	N/A	1,166 SF	N/A	Three-bed: 0	Three-bed: 0
High Pointe Overlook	1500 High Pointe Dr.	Susquehanna	2011	120	1 Bedroom	\$1,327-\$1,666	800-1,000 SF	\$1.66 to \$1.67	One-bed: 0	One-bed: 0
					2 Bedroom	\$1,929	1,150 SF	\$1.68	Two-bed: 0	Two-bed: 1
					3 Bedroom	\$2,337	1,400 SF	\$1.67	Three-bed: 0	Three-bed: 1
Park Run Apartments	3314 Paxton St.	Swatara	1965	120	1 Bedroom	\$900	600 SF	\$1.50	One-bed: 0	One-bed: 0
					2 Bedroom	\$1,000	800 SF	\$1.25	Two-bed: 0	Two-bed: 0
					3 Bedroom	\$1,200	1,000 SF	\$1.20	Three-bed: 0	Three-bed: 0

La Collina	2679 Alessandro Blvd.	Susquehanna	1997	117	2 Bedroom	\$1,295	1,090 SF	\$1.19	Two-bed: 0	Two-bed: 0
					3 Bedroom	\$1,315	1,226 SF	\$1.07	Three-bed: 0	Three-bed: 0
Magnolia Gardens Apartments	210 Hale Ave.	Harrisburg	1950	115	1 Bedroom	N/A	610 SF	N/A	One-bed: 1	One-bed: 0
					2 Bedroom	N/A	750 SF	N/A	Two-bed: 1	Two-bed: 0
Magnolia Hills Apartments	35 Thomas St.	Harrisburg	1951	109	1 Bedroom	N/A	625 SF	N/A	One-bed: 1	One-bed: 0
					2 Bedroom	N/A	800 SF	N/A	Two-bed: 1	Two-bed: 0
Grayco Apartments	115 North St.	Harrisburg	1938	104	Studio	\$650-\$730	450 SF	\$1.44 to \$1.62	Studio: 0	Studio: 0
					1 Bedroom	\$800-\$870	650 SF	\$1.23 to \$1.34	One-bed: 0	One-bed: 0
					2 Bedroom	\$975-\$1,200	850 SF	\$1.15 to \$1.41	Two-bed: 0	Two-bed: 0
Mulberry Station	200 S. Court St.	Harrisburg	1987	100	1 Bedroom	\$1,245	700 SF	\$1.78	One-bed: 0	One-bed: 0
					2 Bedroom	N/A	900 SF	N/A	Two-bed: 0	Two-bed: 0
					3 Bedroom	N/A	1,200 SF	N/A	Three-bed: 0	Three-bed: 0
Spring Valley Apartments	4131 Spring Valley Rd.	Lower Paxton	1972	96	1 Bedroom	N/A	846-895 SF	N/A	One-bed: 0	One-bed: 0
					2 Bedroom	N/A	985-1103 SF	N/A	Two-bed: 0	Two-bed: 0
Laura Acres Apartments	692 Kaylor Dr.	Swatara	1977	92	1 Bedroom	N/A	N/A	N/A	One-bed: 0	One-bed: 1
					2 Bedroom	\$905-\$1,010	750-900 SF	\$1.12 to \$1.21	Two-bed: 0	Two-bed: 1
					3 Bedroom	N/A	N/A	N/A	Three-bed: 0	Three-bed: 1
Quail Run Apartments	4001 Rawleigh St.	Lower Paxton	1968	88	1 Bedroom	\$800	N/A	N/A	One-bed: 0	One-bed: 0
					2 Bedroom	\$900	N/A	N/A	Two-bed: 0	Two-bed: 0
					3 Bedroom	\$1,000	N/A	N/A	Three-bed: 0	Three-bed: 0
Old City Hall	423 Walnut St.	Harrisburg	1910	82	Studio	N/A	450 SF	N/A	Studio: 0	Studio: 0
					1 Bedroom	\$1,339-\$1,507	575-750 SF	\$2.01 to \$2.33	One-bed: 0	One-bed: 3
Spring Street Gardens Apts.	1001 N. Spring St.	Middletown	1970	79	1 Bedroom	N/A	875 SF	N/A	One-bed: 0	One-bed: 0
					2 Bedroom	N/A	1,025 SF	N/A	Two-bed: 0	Two-bed: 0
Scottsdale Apts.	1021 S. Progress Dr.	Susquehanna	1963	75	2 Bedroom	N/A	N/A	N/A	One-bed: 0	One-bed: 0
The Woodlands	770-829 Greys Dr.	Swatara	2011	73	2 Bedroom	\$1,475	1,386 SF	\$1.06	Two-bed: 2	Two-bed: 0
Penn Square Apartments	400 S. 30th St.	Penbrook	1963	70	1 Bedroom	\$775	650 SF	\$1.19	One-bed: 0	One-bed: 0
					2 Bedroom	\$1,000-\$1,200	1,005 SF	\$1.00 to \$1.19	Two-bed: 0	Two-bed: 0
Crooked Hill	3200 Vesta Ln.	Susquehanna	2012	68	3 Bedroom	\$2,308-\$2,408	1,487-2,443 SF	\$0.99 to \$1.55	Three-bed: 1	Three-bed: 3
Paxton Ctr. Apts.	2300 Vartan Ct.	Susquehanna	1995	68	2 Bedroom	N/A	770 SF	N/A	Two-bed: 0	Two-bed: 0
Lawnton Gardens Apartments	5011 Lancaster St.	Swatara	1963	57	1 Bedroom	\$800	550 SF	\$1.45	One-bed: 0	One-bed: 0
					2 Bedroom	\$900	700 SF	\$1.29	Two-bed: 0	Two-bed: 0
					3 Bedroom	\$1200	950 SF	\$1.26	Three-bed: 0	Three-bed: 0

Source: Apartments.com, Apartmentfinder.com, Apartmentguide.com, individual complexes, Urban Partners

Other larger complexes containing 400 units or more, all in Lower Paxton, include: Stonebridge (636 units), Lakewood Hills Apartments (550 units), Twin Lakes Apartments (490 units), Springford Apartments (469 units), and Eagles Crest Apartments (468 units). Eleven complexes are smaller than 100 units—including Spring Valley Apartments in Lower Paxton Township (96 units), Scottsdale Apartments in Susquehanna Township (75 units), and Lawnton Gardens Apartments in Swatara Township (57 units).

Rents

Rents at multi-family apartment complexes in the Southwest Submarket examined in Table 78 cover a variety of price-points—ranging from \$0.74 to \$2.54 SF. The upper end of this scale can be found at Executive House in downtown Harrisburg. Executive House offers studios, one-bedroom, and two-bedroom apartments. Amenities there include a fitness center, business center, lounge, 24-hour maintenance, and immediate proximity to the commercial and recreational assets of the downtown. Rents at Executive House currently have the following ranges:

- Studio units: \$1,170 to \$1,435 per month (\$2.18 to \$2.54 per SF)
- One-bedroom units: \$800 to \$1,507 per month (\$1.23 to \$2.12 per SF)
- Two-bedroom units: \$1,725 per month (\$1.78 to \$1.89 per SF)

Aside from Executive House, larger downtown Harrisburg complexes with greater than 25 units (and advertised) rents are commanding the following rent ranges:

- Studio units: \$650 to \$1,120 per month (\$1.44 to \$1.72 per SF)
- One-bedroom units: \$800 to \$1,507 per month (\$1.23 to \$2.01 per SF)
- Two-bedroom units: \$975 to \$1,594 per month (\$1.15 to \$1.92 per SF)

By comparison, the newest complexes in the remainder of the Submarket constructed in the 2010s are commanding the following rent ranges:

- Studio units: \$1,045 per month (\$1.77 to \$1.84 per SF)
- One-bedroom units: \$1,190 to \$1,424 per month (\$1.28 to \$1.62 per SF)
- Two-bedroom units: \$1,400 to \$2,640 per month (\$1.17 to \$1.47 per SF)
- Three-bedroom units: \$2,325 to \$2,560 per month (\$1.47 to \$1.72 per SF)

Complexes (with available rents) constructed in the 1980s and 1990s are commanding the following rent ranges:

- One-bedroom units: \$900 to \$1,390 per month (\$1.00 to \$1.65 per SF)
- Two-bedroom units: \$970 to \$1,950 per month (\$0.96 to \$1.73 per SF)
- Three-bedroom units: \$1,315 per month (\$1.07 per SF)

Complexes constructed in the 1970s are commanding the following rent ranges:

- One-bedroom units: \$875 to \$1,505 per month (\$1.30 to \$1.95 per SF)
- Two-bedroom units: \$905 to \$1,960 per month (\$1.21 to \$1.41 per SF)
- Three-bedroom units: \$1,150 to \$2,280 per month (\$0.74 to \$1.77 per SF)

Complexes constructed in the 1960s are commanding the following rent ranges:

- Studio units: \$835 to \$1,153 per month (\$2.10 to \$2.17 per SF)
- One-bedroom units: \$775 to \$1,180 per month (\$1.19 to \$1.67 per SF)
- Two-bedroom units: \$900 to \$1,657 per month (\$1.29 to \$1.50 per SF)
- Three-bedroom units: \$1,150 to \$1,767 per month (\$0.97 to \$1.44 per SF)

Finally, complexes constructed prior to the 1960s are commanding the following rent ranges:

- One-bedroom units: \$732 to \$1,075 per month (\$1.46 to \$1.92 per SF)
- Two-bedroom units: \$872 to \$1,300 per month (\$0.97 to \$1.76 per SF)

As the rent ranges described above show, rents generally become lower as complexes get older. However, in many instances, rents per square foot remain largely consistent or even increase for the older buildings. This indicates that the newer units tend to be larger than the older ones but at the same time, older complexes are remaining comparable to, and competitive with, the newest complexes in terms of quality. Figure 44 above demonstrates that most of the Southwest Submarket’s multi-family complexes have similar amenities regardless of their age. In some cases, older complexes have more amenities than newer ones.

Availability

The Southwest Submarket appears to have an extremely competitive multi-family rental housing market in terms of availability. At the time of this research (June 2022), a total of 100 units were available to rent out of 12,411 total units in the 57 Submarket multi-family rental communities, representing an overall vacancy rate of 0.8%¹¹. A healthy rental market has a vacancy rate of around 4%. Eagles Crest Apartments in Lower Paxton Township reported the highest vacancy rate at 4.7% (22 units available for rent in June 2022). In terms of unit types available in the Submarket in June 2022, there were 7 studio units, 32 one-bedroom units, 45 two-bedroom units, and 16 three-bedroom units.

Individual Apartment Units

Aside from the larger multi-family complexes, there are a variety of individual apartments for rent within the Southwest Submarket (other than in multi-family complexes) available in smaller apartment buildings, detached homes, townhomes, or twins. Most include basic

¹¹ Includes units available for immediate occupancy or available through June 2022.

amenities, including in-home washers/dryers, porches or patios, yards, and off-street parking. As of June 2022, there were several such apartments available for rent (see Table 79).

Table 79: Summary of Available Individual Homes for Rent in the Southwest Submarket

Address	Municipality	Type	Rent	SF	Rent/SF	BR	BA
104 State Street	Harrisburg	Apartment	\$1,650	N/A	N/A	3	1.5
224 Reilly Street, Apt. 2	Harrisburg	Apartment	\$1,595	1,400	\$1.14	3	1.0
232 State Street, #2	Harrisburg	Apartment	\$1,495	600	\$2.49	1	1.0
1202 N. 2nd Street, #2	Harrisburg	Apartment	\$1,395	905	\$1.54	1	1.0
210 Walnut Street, #203	Harrisburg	Apartment	\$1,295	675	\$1.92	1	1.0
130 Locust Street	Harrisburg	Apartment	\$1,295	705	\$1.84	1	1.0
11 N. 3rd Street	Harrisburg	Apartment	\$1,285	945	\$1.36	1	1.5
709 N. 2nd Street, #2	Harrisburg	Apartment	\$1,280	1,000	\$1.28	2	1.0
263 Market Street, #1	Middletown	Apartment	\$1,250	850	\$1.47	1	1.0
236 S. 2nd Street, Apt. 303	Harrisburg	Apartment	\$1,225	620	\$1.98	1	1.0
5660 Lancaster Street, Apt. 1	Swatara	Apartment	\$1,200	N/A	N/A	2	1.0
1409 Front Street, 1R	Harrisburg	Apartment	\$1,195	820	\$1.46	1	1.0
1117 N. 2nd Street, Apt. 6	Harrisburg	Apartment	\$1,150	900	\$1.28	2	1.0
11-15 S. 3rd Street	Harrisburg	Apartment	\$1,150	715	\$1.61	1	1.0
1000 N. 6th Street, #2	Harrisburg	Apartment	\$1,150	N/A	N/A	1	1.0
723 N. 19th Street	Harrisburg	Apartment	\$1,100	1,164	\$0.95	3	1.0
250 Liberty Street	Harrisburg	Apartment	\$1,095	1,440	\$0.76	2	2.0
1001 N. 3rd Street, Apt. 3	Harrisburg	Apartment	\$1,095	600	\$1.83	1	1.0
711 N. 2nd Street, #2	Harrisburg	Apartment	\$1,075	N/A	N/A	2	1.0
314 Chestnut Street	Harrisburg	Apartment	\$1,050	678	\$1.55	2	2.0
11-15 S. 3rd Street	Harrisburg	Apartment	\$1,050	595	\$1.76	1	1.0
433 Willow Street, Apt. 3	Highspire	Apartment	\$999	N/A	N/A	1	1.0
60 N. 63rd Street, #4	Swatara	Apartment	\$995	N/A	N/A	2	1.0
255 Briggs Street	Harrisburg	Apartment	\$995	650	\$1.53	1	1.0
1700 N. 2nd Street, Apt. 7	Harrisburg	Apartment	\$925	389	\$2.38	1	1.0
222 Harris Street	Harrisburg	Apartment	\$925	N/A	N/A	1	1.0
1612 Green Street, #1	Harrisburg	Apartment	\$895	868	\$1.03	1	1.0
1308 Penn Street, Apt. 1	Harrisburg	Apartment	\$895	550	\$1.63	1	1.0
368 S.2nd Street, Apt. 1	Harrisburg	Apartment	\$895	700	\$1.28	1	1.0
260 Verbeke Street, Apt. 4	Harrisburg	Apartment	\$875	500	\$1.75	1	1.0
552 Radnor Street, #1	Harrisburg	Apartment	\$875	N/A	N/A	1	1.0
912 N. 3rd Street, Apt. 2	Harrisburg	Apartment	\$845	N/A	N/A	1	1.0
29 S. 3rd Street	Harrisburg	Apartment	\$840	198	\$4.24	0	1.0
145 N. Front Street	Steelton	Apartment	\$825	N/A	N/A	3	1.0
4790 Derry Street, #4	Harrisburg	Apartment	\$795	600	\$1.33	1	1.0
1102 N 3rd Street, #C3	Harrisburg	Apartment	\$760	400	\$1.90	0	1.0
1913 Market Street, Apt. 2A	Harrisburg	Apartment	\$750	N/A	N/A	1	1.0
60 Balm Street, Apt. 2	Harrisburg	Apartment	\$700	N/A	N/A	1	1.0
193 S. Front Street, Apt. 4	Steelton	Apartment	\$700	N/A	N/A	1	1.0
31 N. 19th Street	Harrisburg	Apartment	\$698	N/A	N/A	1	1.0
1500 Verbeke Street	Harrisburg	Apartment	\$695	N/A	N/A	1	1.0

226 Woodbine Avenue	Harrisburg	Apartment	\$675	N/A	N/A	0	1.0
1912 Market Street #2R	Harrisburg	Apartment	\$595	N/A	N/A	3	2.0
1414 Regina Street, #3	Harrisburg	Apartment	\$550	N/A	N/A	0	1.0
411 Bombaugh Street, #4	Harrisburg	Apartment	\$550	N/A	N/A	0	1.0
1934 State Street, Apt. 3	Harrisburg	Apartment	\$545	400	\$1.36	0	1.0
1936 Walnut Street	Harrisburg	Apartment	\$545	N/A	N/A	0	1.0
6408 Churchill Road	Lower Paxton	House	\$2,695	2,206	\$1.22	4	2.0
6719 Conway Road	Lower Paxton	House	\$2,500	1,800	\$1.39	3	2.5
600 Oberlin St	Steelton	House	\$1,950	2,464	\$0.79	5	2.5
4506 N. Progress Avenue	Harrisburg	House	\$1,345	1,548	\$0.87	2	2.0
2600 Lexington Street	Harrisburg	House	\$1,195	1,410	\$0.85	3	1.0
1331 Rolleston Street	Harrisburg	Townhouse	\$950	N/A	N/A	2	1.0
2639 Booser Avenue, #2	Harrisburg	Townhouse	\$950	N/A	N/A	2	1.0
1339 Rolliston Street	Harrisburg	Townhouse	\$900	N/A	N/A	2	1.0
927 Rose Street	Harrisburg	Townhouse	\$1,695	900	\$1.88	2	1.0
1816 Green Street, Apt. 1	Harrisburg	Townhouse	\$1,295	900	\$1.44	2	1.0
5811 Hidden Lake Drive, #1	Lower Paxton	Townhouse	\$1,700	1,200	\$1.42	3	2.0
109 Locust Street	Harrisburg	Townhouse	\$1,375	1,000	\$1.38	2	1.0
6443 Terrace Court, #1	Lower Paxton	Townhouse	\$2,300	1,941	\$1.18	3	2.5
543 Saint Mary's Drive	Steelton	Townhouse	\$1,125	952	\$1.18	2	1.0
2425 Mercer Street	Harrisburg	Townhouse	\$1,195	1,024	\$1.17	3	1.0
1634 N. 3rd Street	Harrisburg	Townhouse	\$850	750	\$1.13	1	1.0
2336 N. 4th Street	Harrisburg	Townhouse	\$1,595	1,504	\$1.06	4	1.5
416 Harris Street	Harrisburg	Townhouse	\$1,400	1,386	\$1.01	3	1.0
715 St. Mary's Drive	Steelton	Townhouse	\$1,350	1,369	\$0.99	3	1.0
214 Cumberland Street	Harrisburg	Townhouse	\$1,895	1,940	\$0.98	4	1.0
1816 Boas Street	Harrisburg	Townhouse	\$1,225	1,272	\$0.96	3	1.0
334 Hamilton Street	Harrisburg	Townhouse	\$1,550	1,656	\$0.94	3	2.0
620 Ross Street	Harrisburg	Townhouse	\$1,100	1,224	\$0.90	4	1.0
2774 Monticello Lane, #23	Lower Paxton	Townhouse	\$2,650	2,970	\$0.89	4	3.0
434 Pepper Street, #1	Harrisburg	Townhouse	\$850	1,000	\$0.85	1	1.0
313 Crescent Street	Harrisburg	Townhouse	\$1,550	1,886	\$0.82	5	1.5
1430 Berryhill Street	Harrisburg	Townhouse	\$1,300	1,658	\$0.78	5	1.0
221 Herr Street	Harrisburg	Townhouse	\$1,350	1,728	\$0.78	2	1.5
3814 Laraby Drive	Lower Paxton	Townhouse	\$1,595	2,056	\$0.78	2	2.5
2111 Greenwood Street	Harrisburg	Townhouse	\$975	1,306	\$0.75	3	1.0
720 N. 18th Street	Harrisburg	Townhouse	\$1,195	1,700	\$0.70	4	1.5
1926 Park Street	Harrisburg	Townhouse	\$1,100	1,722	\$0.64	5	1.0
2628 Lexington Street	Harrisburg	Townhouse	\$1,245	2,034	\$0.61	3	1.0
2720 Jefferson Street	Harrisburg	Townhouse	\$1,250	2,376	\$0.53	4	1.5
401 Conewago Street	Middletown	Twin	\$2,275	2,000	\$1.14	4	3.5
2343 N 2nd Street	Harrisburg	Twin	\$2,050	2,600	\$0.79	4	3.0
1031 Oberlin Road	Lower Swatara	Twin	\$1,450	1,408	\$1.03	3	2.0
3020 N 3rd Street	Harrisburg	Twin	\$1,295	1,564	\$0.83	3	1.0
1917 Regina Street	Harrisburg	Twin	\$1,200	1,860	\$0.65	5	1.0
91 N. 18th Street	Harrisburg	Twin	\$1,100	1,976	\$0.56	5	1.0

Source: Apartments.com, Zillow.com, Craigslist, Urban Partners

Apartments

Apartments for rent in the Southwest Submarket (not within multi-family complexes) as of June 2022 are mostly one-bedroom units, with some studios, two-bedroom units, and an occasional three-bedroom unit. The highest rent commanded among available apartments is \$1,650 per month for a three-bedroom apartment in downtown Harrisburg, while the lowest is \$545 for a studio near Reservoir Park. The highest rent on a square-footage basis among available apartments is \$4.24 per SF for a high-end studio on S. 3rd Street, also in downtown. More commonly, apartments range from about \$1.28 to \$1.98 per SF.

Figure 46: Sample of Available Apartments for Rent



Source: Zillow.com, Urban Partners

Detached Homes

As of June 2022, there are just five single-family detached homes for rent in the Southwest Submarket, ranging from two- to five-bedroom units. The highest rent commanded among available detached homes is \$2,695 per month for a 2,200 SF four-bedroom home, or \$1.22 per SF, in Lower Paxton Township. This is the second-highest rent on a square-footage basis among available detached homes for rent. More commonly, detached homes range from about \$0.79 to \$0.85 per SF. Overall, rents range from \$1,195 to \$2,695 per month for detached homes.

Figure 47: Sample of Available Detached Homes for Rent



Source: Zillow.com, Urban Partners

Townhomes

Townhomes available for rent in the Southwest Submarket are numerous as of June 2022, with the units containing between one and five bedrooms. The highest rent commanded among available townhomes is \$2,650 per month for a newer 2,970 SF unit in Lower Paxton Township, or \$0.89 per SF. The lowest rent is \$850, or \$0.85, for a one-bedroom townhome in Harrisburg. The highest rent on a square-footage basis among available townhomes is \$1.88 per SF for a 900 SF 2-bedroom home on Rose Street in Midtown Harrisburg. More commonly, townhomes range from about \$0.75 to \$1.06 per SF.

Figure 48: Sample of Available Townhomes for Rent



Source: Zillow.com, Urban Partners

Twins

Twins are similar to townhomes but share just one wall and tend to be larger. As of June 2022, there are just six twin homes for rent in the Southwest Submarket, ranging from three- to five-bedroom units. The highest rent commanded among available twins is \$2,275 per month for a 2,000 SF four-bedroom home, or \$1.14 per SF, in Middletown Borough. This is also the highest rent on a square-footage basis among available twin homes for rent. More commonly, detached homes range from about \$0.65 to \$0.83 per SF. Overall, rents range from \$1,100 to \$2,275 per month for twins.

Figure 49: Sample of Available Twin Homes for Rent



Source: Zillow.com, Urban Partners

9. Population Projections, Future Housing Needs

Population Growth Assumptions & Housing Demand

According to projections produced by the Pennsylvania State Data Center, Dauphin County’s population is expected to grow by 6.03% from 2020 to 2040 (see Table 80). About 60% of this growth will occur by 2030. The county’s total population in 2040 is projected at 303,661 residents, 17,260 more than the 2020 population. (Note that the State Data Center’s published figures estimated 2020 population. We have adjusted those numbers to the U.S. Census Bureau’s reported population according to the 2020 Decennial Census but have maintained the State Data Center’s allocations to age groups and the Data Center’s increments of growth after 2020.)

Table 80: Dauphin County Population Growth Forecasts, 2020-2040

	2010	2020	2030	2040	Change (2020-2040)	% Change (2020-2040)
Dauphin County Population	268,281	286,401	296,027	303,661	17,260	6.03%
Persons ages 0-14 years	50,518	52,204	52,195	52,546	342	0.66%
Persons ages 15-34 years	69,177	68,788	69,470	72,093	3,305	4.80%
Persons ages 35-64 years	111,609	112,113	105,987	107,897	(4,216)	-3.76%
Persons ages 65+ years	36,977	53,296	68,375	71,125	17,829	33.45%
Dauphin County Households	110,435	118,041	122,083	125,278	7,237	6.13%
Group Quarters Population		6,581	7,018	7,097	516	
Population in Households		279,820	289,010	296,564	16,744	
Average Household Size		2.37	2.37	2.37		

Source: Pennsylvania State Data Center for the Center for Rural Pennsylvania, U.S. Census Bureau, Urban Partners

This population growth is heavily skewed toward persons over the age of 65—with that group expected to grow by one-third in the 2020 to 2040 period. The number children under 15 is anticipated to remain flat; the cohort of younger adults will grow by about 5%; and group of persons ages 35 to 64 will decline by about 4%.

Similarly, the State Data Center anticipates a growth in households of 7,237 from 2020 to 2040.

About 2% of Dauphin County’s population lives in group quarters such as college dorms, correctional institutions, and nursing home and assisted living facilities. This population share in group quarters should increase slightly as the population ages and occupancy in assisted living and nursing home facilities grows. We anticipate about 500 more nursing home/assisted living residents by 2040.

The remaining population resides in households. The State Data Center estimates average household size in Dauphin County at 2.37 persons through the forecast period. Assuming that

ratio continues, the projected number of Dauphin County households in 2030 is 122,083; in 2040, the number of households is 125,278 (see Table 81).

Table 81: New Housing Unit Requirements Dauphin County 2020-2040

	2020	2030	2040
Population in Households	279,820	289,010	296,564
Households	118,041	122,083	125,278
Average Household Size	2.37	2.37	2.37
Housing Units	126,514		
Vacancy	6.7%	5.6%	4.5%
Housing Units Required		129,325	131,181
Net New Housing Units Needed by 2030		2,811	
Net New Housing Units Needed 2030-2040			1,856

Source: Pennsylvania State Data Center for the Center for Rural Pennsylvania, U.S. Census Bureau, Urban Partners

Reported housing vacancy in 2020 is about 6.7%; we assume vacancy will decline to 5.6% by 2030 and 4.5% by 2040. Under those aggregate assumptions, the Dauphin County market will require the addition of an annual average of 280 housing units in the 2020 to 2030 period—a total of 2,811 new units during the decade. Beyond 2030 to 2040, new housing requirements will 185 annually, or a total of 1,856 additional units.

Population Growth By Age Group

On Table 82, we estimate population by age and allocation to group quarters and households.

Table 82: Dauphin County Population Forecasts by Age

	2020	2030	2040	Change 2020-2040
Population				
Under 15 Years	52,204	52,195	52,546	342
15 to 34 Years	68,788	69,470	72,093	3,305
35 to 64 Years	112,113	105,987	107,897	-4,216
65+ Years	53,296	68,375	71,125	17,829
Group Quarters				
Under 15 Years	575	575	575	-
15 to 34 Years	2,400	2,400	2,400	-
35 to 64 Years	1,400	1,400	1,400	-
65+ Years	2,200	2,625	2,725	525
Population in Households				
Under 15 Years	51,629	51,620	51,971	342
15 to 34 Years	66,388	67,070	69,693	3,305
35 to 64 Years	110,713	104,587	106,497	-4,216
65+ Years	51,096	65,750	68,400	17,304

Source: Pennsylvania State Data Center for the Center for Rural Pennsylvania, U.S. Census Bureau, Urban Partners

After adjusting for group quarters population, these forecasts show a large growth in the population over 65 in households of almost 14,700 persons during the decade through 2030 and continued growth in this group through 2040, for a total growth of 17,304 persons from 2020 to 2040.

Components of Housing Demand

Urban Partners analyzed the 2020 U.S. Census data to understand the demand for housing by age of householder and tenure. As shown on Table 83, the ratio of population in households to “householders” (head of household) varies by age group from 0.349 householders per capita for those ages 15 to 34 to 0.641 householders per capita for those ages 65 and older. Depending on the age of the householder, there is also significant variation in tenure, with 65.9% of 15- to 34-year-old households renting, while 81.8% of households over age 65 are homeowners.

Table 83: Dauphin County Housing Demand by Age of Householder

	2020 Population	Householders Per Capita	2020 Households	Owner Share	Renter Share
Persons 15 to 34 Years	66,388	0.349			
Persons 35 to 64 Years	110,713	0.582			
Persons 65+ Years	51,096	0.641			
Householders 15 to 34 Years			23,174	34.1%	65.9%
Householders 35 to 64 Years			64,480	69.1%	30.9%
Householders 65+ Years			32,769	81.8%	18.2%

Source: Pennsylvania State Data Center for the Center for Rural Pennsylvania, U.S. Census Bureau, Urban Partners

On Table 84 shown on the following page, we apply these factors to the household population growth data on Table 82 to identify the likely composition of households in Dauphin County in 2030 and 2040 by age of householder and tenure. Note that total growth in households is estimated at 12,178 for the twenty-year period with 11,745 of those households (96%) being headed by a householder 65 years of age or older.

Considering this age-specific growth, the demand for new housing will be substantially larger than the estimates derived from aggregate analysis because these older households have smaller average household sizes. Rather than the 7,239 new households expected in Table 80, this more nuanced analysis shows the need to house nearly 5,000 additional households due to the overall aging of the population.

During the 2020 to 2040 period, there can be expected to be 9,342 new homeowner households and 2,855 new rental households.

Table 84: Dauphin County Housing Demand by Tenure & Age of Householder (2020-2040)

	2020	2030	2040	Growth 2020-2040
All Households	118,041	126,491	130,219	12,178
15 to 34 Years	22,716	23,412	24,328	1,612
35 to 64 Years	63,205	60,912	62,025	-1,180
65+ Years	32,121	42,167	43,866	11,745
All Owner-Occupied Housing	77,695	84,566	87,037	9,342
15 to 34 Years	7,746	7,984	8,296	550
35 to 64 Years	43,674	42,090	42,859	-815
65+ Years	26,275	34,493	35,883	9,608
All Renter-Occupied Housing	40,346	41,925	43,181	2,835
15 to 34 Years	14,970	15,429	16,032	1,062
35 to 64 Years	19,530	18,822	19,166	-364
65+ Years	5,846	7,674	7,984	2,138

Source: Pennsylvania State Data Center for the Center for Rural Pennsylvania, U.S. Census Bureau, Urban Partners

On Table 85, we disaggregate this information to identify the increments of household demand likely to appear in Dauphin County during the 2020 to 2040 period. This new demand is heavily oriented toward the senior market with 77% of increased demand involving additional sales housing occupied by seniors and 16% oriented to senior rentals.

Table 85: Incremental Housing Need for 2030 & 2040 by Tenure & Age of Householder

	Units Needed 2020 to 2030	Units Needed 2030 to 2040	Total Units Needed 2020 to 2040	%
Owner-Occupied Housing	6,871	2,471	9,342	
Householder 15 to 34 Years	237	312	549	6%
Householder 35 to 64 Years	(1,584)	769	(815)	-9%
Householder 65+ Years	8,218	1,390	9,608	103%
Renter-Occupied Housing	1,579	1,256	2,835	
Householder 15 to 34 Years	459	603	1,062	37%
Householder 35 to 64 Years	(708)	344	(364)	-13%
Householder 65+ Years	1,828	309	2,137	75%

Sources: Urban Partners

We also assume that this increased housing demand will encourage a reduction in overall vacancy to 4.5% by 2040 (see Table 86 on the following page). More intensive use of the existing housing stock will provide 2,300 units to capture a portion of this growing demand. Making this stock attractive to households may require some efforts as moderate housing rehabilitation and unit modernization.

Table 86: Total Demand Growth, New Supply Needed for 2030 & 2040

	Units Needed 2020 to 2030	Units Needed 2030 to 2040	Total Units Needed 2020 to 2040
Total Demand Growth	8,450	3,728	12,178
Reduction in Vacancy	(900)	(1,400)	(2,300)
New Supply Needed	7,550	2,328	9,878
Senior Homeownership	6,200	1,400	7,600
Senior Rental	1,350	228	1,578
Other Rental		700	700

Sources: Urban Partners

We should note that not all this senior demand will need to be met by new construction. Some adjustment in supply will occur naturally as middle-aged households age to senior status but remain in their own homes. However, there will be increasing pressure through the decade for lower-maintenance housing adapted to senior living.

We should also note that this senior housing demand is in addition to the needs identified in the group quarters discussion for an increase in nursing home/assisted living capacity sufficient to accommodate 525 additional residents during the 2020-2040 period, mostly by 2030.

10. Housing Strategies

The following strategies were formulated by Urban Partners based on the quantitative analysis performed above, with input and guidance from Dauphin County staff, municipal representatives, and key stakeholders. The four strategies detailed below represent the most significant topics for the County and its municipal partners to pursue in the coming decade, but not necessarily an exhaustive list of policies and strategies the County may pursue in the effort to promote a healthy and balanced housing market in Dauphin County.

■ Strategy #1: Diversify housing choices to accommodate all life stages and household needs.

Key findings:

- In 2019, three-out-of-five Dauphin County households (more than 26,000) earning less than \$50,000 annually were cost-burdened.
- Home prices in the last five years have escalated at an annual rate of 4.8%, increasing financial barriers for first-time home buyers and low-to-moderate income households.
- As of mid-2022, vacancy rates in multi-family apartment complexes were below 1% throughout the county, compared to a market equilibrium vacancy rate of 5%.
- As a diverse county that is home to several special needs communities (including persons with disabilities, persons experiencing homelessness, veterans, and ex-offenders), Dauphin County is experiencing severe shortages of housing and other supportive programs to assist the most vulnerable residents.

Policy recommendations:

- 1.1. Collaborate with Pennsylvania Housing Finance Agency (PHFA), municipal agencies, and private/non-profit housing development organizations to preserve existing income-restricted rental housing stock (i.e., devise a plan for projects with expiring compliance periods).
- 1.2. Work with PHFA, municipal agencies, and private/non-profit housing development organizations to build new income-restricted rental units. Evaluate the potential of mixed-income development schemes in highly resourced communities.
- 1.3. Coordinate with social service providers and housing development organizations to build and/or retain homes for senior and low-to-moderate income residents with disabilities and special needs.
- 1.4. Develop or expand programs/incentives to assist potential homebuyers, particularly lower-income households, with down payment assistance, low-interest loans, and other financial assistance.

- 1.5. Work with developers and home builders to construct “right-sized” homes at attainable prices, both for-sale and for-rent. An example of a “right-sized” home is a 3-bed/2.5 bath home with 1,800 SF of living space or smaller.
- 1.6. Promote the development of townhomes and condominiums with ample amenities for young professionals and empty nesters that are seeking high-quality housing without maintenance responsibilities.
- 1.7. Support the work of the Dauphin County Reentry Coalition in assisting ex-offenders find safe and affordable housing.
- 1.8. Support the work of the Capital Area Coalition for Homeless in providing shelter and social services to individuals and families experiencing homelessness. Evaluate the feasibility of implementing innovative solutions to house homeless persons (for example, tiny house villages in [Portland, OR](#); [Madison, WI](#); and [Philadelphia, PA](#))

■ **Strategy #2: Stabilize the county’s aging housing stock.**

Key findings:

- Census data show that more than half of all housing units in Dauphin County were built before 1970.
- As of 2019, there are 6,700 “other vacant” units which generally refer to long-term vacancies for homes in disrepair, legal issues, or other circumstances that prevent safe occupancy.
- Many older homes are underperforming in the market and/or will require major investments in order to retain their value.

Policy recommendations:

- 2.1. Maintain a real-time inventory of vacant or distressed homes along with key property information (such as ownership with mailing address, lien/judgment status, tax payment status, mortgage, etc.).
- 2.2. Institute a vacant property registration program in jurisdictions with a high proportion of vacancies.
- 2.3. Increase vigilance on housing units with code violations. Consider supporting municipalities that lack code enforcement personnel and/or resources.
- 2.4. Partner with various service providers to launch a multi-faceted home improvement program in mature urban core neighborhoods and older boroughs where focused intervention efforts will reverse disinvestment and stabilize the housing stock. Support basic systems repairs (roofing/weatherization, mechanical system, etc.) and

façade improvements (repairs to front porch, sidewalks, street address labels, landscaping, etc.).

- 2.5. Leverage existing programs such (e.g., the County’s Housing Rehabilitation Program, USDA Repair Loan/Grant) with new funding sources, such as DCED’s Whole Home Repairs through which \$2.8 million of American Rescue Plan Act (ARPA) funds are available for Dauphin County.
- 2.6. Target specific blocks and parcels for infill development and redevelopment. Prioritize opportunities for new housing development on publicly owned land.
- 2.7. Work with municipalities and area employers to offer an incentive program for purchasing a home in designated urban core neighborhoods and older boroughs.

■ **Strategy #3: Expand housing options for the growing senior population.**

Key findings:

- Consistent with national demographic trends, Dauphin County’s population is aging.
- Forecasts show a large growth in the population over 65 in households from 2020 to 2040 (total growth of 17,304 persons).
- The incremental housing demand for seniors from 2020 to 2040 are 9,608 owner-occupied units and 2,137 rental units, far greater than any other age group.

Policy recommendations:

- 3.1. Initiate a senior home modification program that offer grants, low-interest loans, and/or volunteer labor for a variety of items to help mobility-challenged seniors live safely in their current homes (such as ramps, stair lifts, bathroom grab bars, roll-in showers, and ground floor bedroom conversion).
- 3.2. Increase the supply of new, lower-maintenance housing in walkable, amenity-rich neighborhoods with design features that are suitable for senior living.
- 3.3. Offer technical assistance to municipalities to encourage/incentivize accessory dwelling units (ADUs) as an affordable housing option for seniors.
- 3.4. Work with retirement home communities to build sufficient units/beds in various levels of care (independent living communities, assisted living facilities, and nursing homes) in the next twenty years.
- 3.5. Work with affordable housing providers to build new low-income senior housing and retain the supply of such units. Prioritize areas serviced by public transit, social services, and medical facilities.

■ **Strategy #4: Evaluate land use policies and streamline project approval processes.**

Key findings:

- Stakeholder interviews with home builders, housing providers, local planning officials, and other stakeholders revealed that obtaining project approval for multi-family and affordable housing projects are a challenge in certain local jurisdictions.
- Even in cases where proposed developments that are consistent with comprehensive plan objectives; and meet zoning/land use standards, non-single-family residential developments are often met with community pushback.
- Some jurisdictions have antiquated zoning codes and land use policies that severely limit housing development options.

Policy recommendations:

- 4.1. Create a working group consisting of housing specialists and business recruitment/economic development practitioners to identify key housing initiatives to maintain and grow the county.
- 4.2. Secure allies from a broad range of interests—including the business community—for affordable housing and multi-family development. Educate elected officials about the fiscal and community benefits of denser residential development patterns.
- 4.3. Examine and modify current zoning in areas deemed necessary to ensure developers can build affordable housing projects and denser residential structures such as such as apartments, townhomes, and condominiums by right.
- 4.4. Provide technical assistance to local jurisdictions to draft ordinances allowing desired housing typologies.

Appendix 1: Residential Tapestry Segmentation

In addition to the traditional demographic data from the U.S. Census Bureau, a Psychographic Segmentation was analyzed for Dauphin County residents. Whereas the census data provide historical resident profiles in a particular geographic location, psychographics broadens the scope by identifying lifestyle habits, values, attitudes, and other defining attributes.

For this study, ESRI Tapestry Segmentation dataset—which classifies resident groups into 67 unique segments in easy-to-visualize terms based not only on demographics but also on socioeconomic characteristics—was analyzed for Dauphin County residents.

According to ESRI, the segment called In Style is the most prevalent in the county, followed by Parks and Rec, Salt of the Earth, Green Acres, and Comfortable Empty Nesters. Forty percent (40.0%) of all households fall in one of these five segments (Table 87).

Table 87: Top ESRI Tapestry Segments

	Dauphin County Households %	All U.S. Households %
1. In Style	14.4%	14.4%
2. Parks and Rec	9.3%	23.7%
3. Salt of the Earth	6.0%	29.7%
4. Green Acres	5.3%	35.0%
5. Comfortable Empty Nesters	5.0%	40.0%

Source: ESRI, Urban Partners

The following pages show detailed profiles for the top segments.



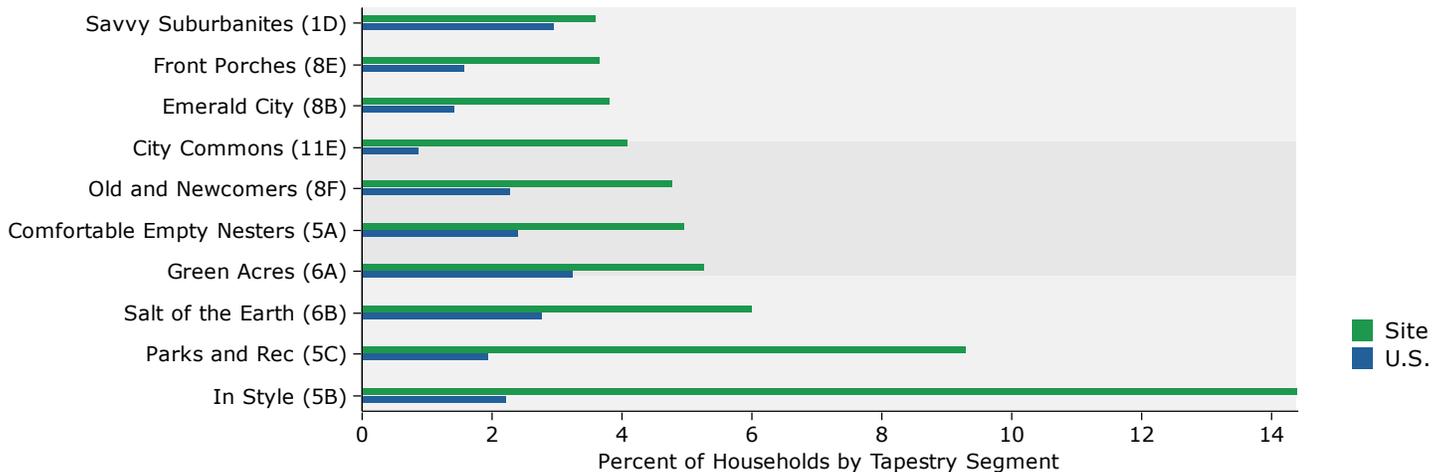
Tapestry Segmentation Area Profile

Dauphin County, PA
 Dauphin County, PA
 Geography: County

Top Twenty Tapestry Segments

Rank	Tapestry Segment	2022 Households		2022 U.S. Households		Index
		Percent	Cumulative Percent	Percent	Cumulative Percent	
1	In Style (5B)	14.4%	14.4%	2.2%	2.2%	644
2	Parks and Rec (5C)	9.3%	23.7%	2.0%	4.2%	473
3	Salt of the Earth (6B)	6.0%	29.7%	2.8%	7.0%	216
4	Green Acres (6A)	5.3%	35.0%	3.3%	10.2%	162
5	Comfortable Empty Nesters (5A)	5.0%	40.0%	2.4%	12.7%	206
Subtotal		40.0%		12.7%		
6	Old and Newcomers (8F)	4.8%	44.8%	2.3%	14.9%	209
7	City Commons (11E)	4.1%	48.8%	0.9%	15.8%	467
8	Emerald City (8B)	3.8%	52.7%	1.4%	17.3%	267
9	Front Porches (8E)	3.7%	56.3%	1.6%	18.8%	231
10	Savvy Suburbanites (1D)	3.6%	59.9%	3.0%	21.8%	122
Subtotal		20.0%		9.2%		
11	Set to Impress (11D)	3.6%	63.5%	1.4%	23.2%	260
12	Rustbelt Traditions (5D)	3.4%	66.9%	2.1%	25.3%	157
13	Golden Years (9B)	3.3%	70.2%	1.3%	26.7%	253
14	Heartland Communities (6F)	3.2%	73.5%	2.2%	28.9%	148
15	Traditional Living (12B)	2.6%	76.1%	1.9%	30.7%	138
Subtotal		16.1%		8.9%		
16	Exurbanites (1E)	2.5%	78.6%	1.9%	32.7%	131
17	Fresh Ambitions (13D)	2.2%	80.8%	0.7%	33.3%	339
18	Social Security Set (9F)	2.1%	82.9%	0.8%	34.2%	252
19	Hometown Heritage (8G)	1.9%	84.8%	1.2%	35.3%	157
20	Young and Restless (11B)	1.6%	86.4%	1.8%	37.1%	91
Subtotal		10.3%		6.4%		
Total		86.4%		37.1%		233

Top Ten Tapestry Segments Site vs. U.S.



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

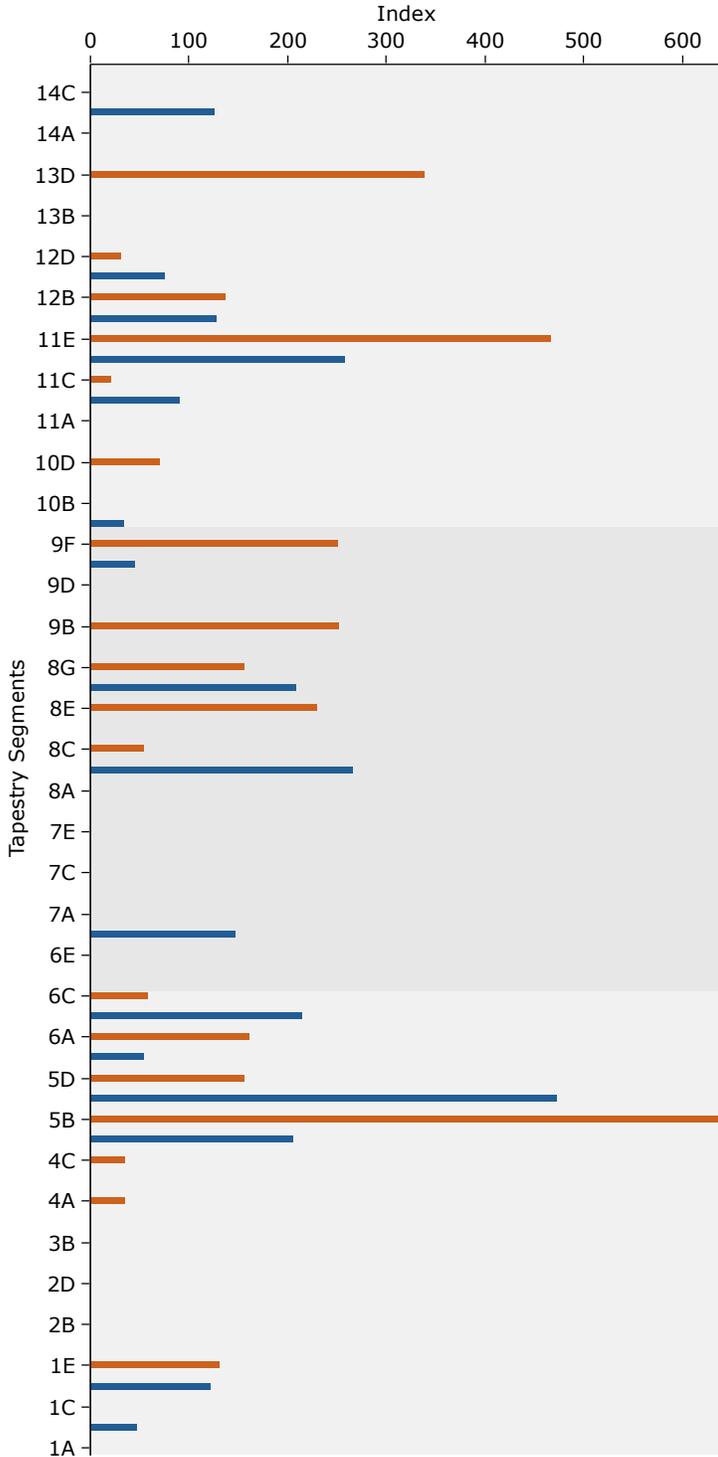
Source: Esri



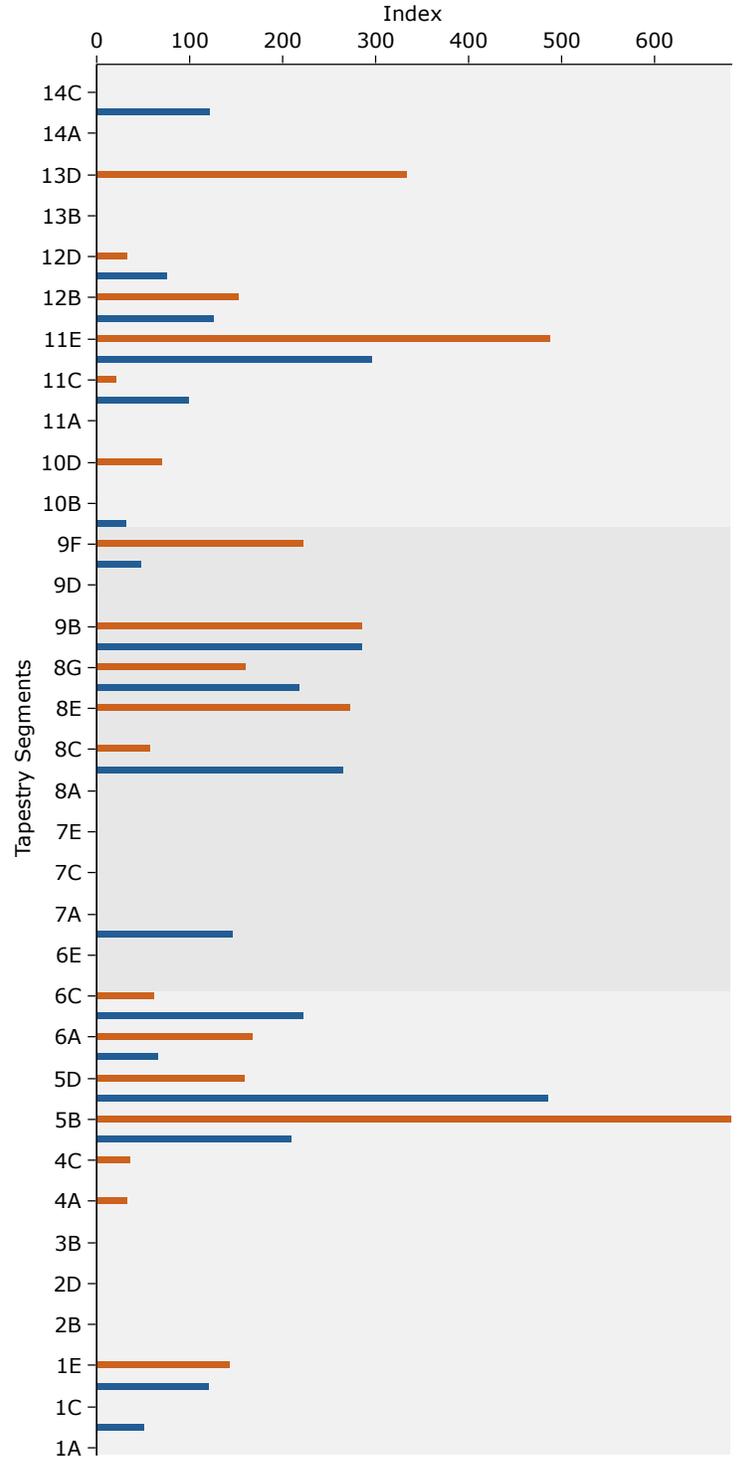
Tapestry Segmentation Area Profile

Dauphin County, PA
 Dauphin County, PA
 Geography: County

2022 Tapestry Indexes by Households



2022 Tapestry Indexes by Total Population 18+



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

Source: Esri



Tapestry Segmentation Area Profile

Dauphin County, PA
 Dauphin County, PA
 Geography: County

Tapestry LifeMode Groups	2022 Households			2022 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	117,826	100.0%		229,974	100.0%	
1. Affluent Estates	8,145	6.9%	70	17,792	7.7%	72
Top Tier (1A)	0	0.0%	0	0	0.0%	0
Professional Pride (1B)	930	0.8%	48	2,198	1.0%	52
Boomburbs (1C)	0	0.0%	0	0	0.0%	0
Savvy Suburbanites (1D)	4,249	3.6%	122	9,063	3.9%	122
Exurbanites (1E)	2,966	2.5%	131	6,531	2.8%	144
2. Upscale Avenues	0	0.0%	0	0	0.0%	0
Urban Chic (2A)	0	0.0%	0	0	0.0%	0
Pleasantville (2B)	0	0.0%	0	0	0.0%	0
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Enterprising Professionals (2D)	0	0.0%	0	0	0.0%	0
3. Uptown Individuals	0	0.0%	0	0	0.0%	0
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
4. Family Landscapes	2,601	2.2%	28	5,113	2.2%	27
Workday Drive (4A)	1,291	1.1%	36	2,543	1.1%	34
Home Improvement (4B)	0	0.0%	0	0	0.0%	0
Middleburg (4C)	1,310	1.1%	36	2,570	1.1%	37
5. GenXurban	39,342	33.4%	299	77,822	33.8%	312
Comfortable Empty Nesters (5A)	5,862	5.0%	206	11,836	5.1%	211
In Style (5B)	16,976	14.4%	644	33,247	14.5%	684
Parks and Rec (5C)	10,960	9.3%	473	21,673	9.4%	487
Rustbelt Traditions (5D)	3,958	3.4%	157	7,495	3.3%	161
Midlife Constants (5E)	1,586	1.3%	56	3,571	1.6%	67
6. Cozy Country Living	18,221	15.5%	132	36,618	15.9%	137
Green Acres (6A)	6,214	5.3%	162	13,081	5.7%	168
Salt of the Earth (6B)	7,086	6.0%	216	14,278	6.2%	223
The Great Outdoors (6C)	1,092	0.9%	60	2,220	1.0%	63
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	3,829	3.2%	148	7,039	3.1%	148
7. Sprouting Explorers	0	0.0%	0	0	0.0%	0
Up and Coming Families (7A)	0	0.0%	0	0	0.0%	0
Urban Villages (7B)	0	0.0%	0	0	0.0%	0
Urban Edge Families (7C)	0	0.0%	0	0	0.0%	0
Forging Opportunity (7D)	0	0.0%	0	0	0.0%	0
Farm to Table (7E)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

Source: Esri



Tapestry Segmentation Area Profile

Dauphin County, PA
 Dauphin County, PA
 Geography: County

Tapestry LifeMode Groups	2022 Households			2022 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	117,826	100.0%		229,974	100.0%	
8. Middle Ground	18,117	15.4%	141	34,213	14.9%	146
City Lights (8A)	0	0.0%	0	0	0.0%	0
Emerald City (8B)	4,494	3.8%	267	7,588	3.3%	266
Bright Young Professionals (8C)	1,498	1.3%	55	2,867	1.2%	59
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	4,312	3.7%	231	9,568	4.2%	274
Old and Newcomers (8F)	5,631	4.8%	209	10,122	4.4%	220
Hometown Heritage (8G)	2,182	1.9%	157	4,068	1.8%	162
9. Senior Styles	7,085	6.0%	104	12,816	5.6%	108
Silver & Gold (9A)	0	0.0%	0	0	0.0%	0
Golden Years (9B)	3,939	3.3%	253	8,013	3.5%	286
The Elders (9C)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	0	0.0%	0	0	0.0%	0
Retirement Communities (9E)	662	0.6%	47	1,199	0.5%	49
Social Security Set (9F)	2,484	2.1%	252	3,604	1.6%	223
10. Rustic Outposts	2,224	1.9%	24	4,255	1.9%	23
Southern Satellites (10A)	1,260	1.1%	35	2,357	1.0%	33
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Economic BedRock (10C)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	964	0.8%	71	1,898	0.8%	71
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
11. Midtown Singles	11,344	9.6%	153	20,408	8.9%	162
City Strivers (11A)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	1,906	1.6%	91	3,275	1.4%	100
Metro Fusion (11C)	371	0.3%	22	654	0.3%	22
Set to Impress (11D)	4,244	3.6%	260	7,990	3.5%	298
City Commons (11E)	4,823	4.1%	467	8,489	3.7%	490
12. Hometown	6,724	5.7%	96	12,917	5.6%	101
Family Foundations (12A)	1,571	1.3%	129	3,043	1.3%	127
Traditional Living (12B)	3,074	2.6%	138	6,107	2.7%	153
Small Town Sincerity (12C)	1,611	1.4%	76	2,871	1.2%	77
Modest Income Homes (12D)	468	0.4%	32	896	0.4%	34
13. Next Wave	2,627	2.2%	57	5,170	2.2%	53
Diverse Convergence (13A)	0	0.0%	0	0	0.0%	0
Family Extensions (13B)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	0	0.0%	0	0	0.0%	0
Fresh Ambitions (13D)	2,627	2.2%	339	5,170	2.2%	335
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
14. Scholars and Patriots	1,396	1.2%	75	2,850	1.2%	55
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
College Towns (14B)	1,396	1.2%	127	2,850	1.2%	124
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

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Source: Esri



Tapestry Segmentation Area Profile

Dauphin County, PA
 Dauphin County, PA
 Geography: County

Tapestry Urbanization Groups	2022 Households			2022 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	117,826	100.0%		229,974	100.0%	
1. Principal Urban Center	2,627	2.2%	30	5,170	2.2%	33
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
City Strivers (11A)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	0	0.0%	0	0	0.0%	0
Fresh Ambitions (13D)	2,627	2.2%	339	5,170	2.2%	335
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
2. Urban Periphery	7,866	6.7%	27	14,955	6.5%	37
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Rustbelt Traditions (5D)	3,958	3.4%	157	7,495	3.3%	161
Urban Villages (7B)	0	0.0%	0	0	0.0%	0
Urban Edge Families (7C)	0	0.0%	0	0	0.0%	0
Forging Opportunity (7D)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0
City Lights (8A)	0	0.0%	0	0	0.0%	0
Bright Young Professionals (8C)	1,498	1.3%	55	2,867	1.2%	59
Metro Fusion (11C)	371	0.3%	22	654	0.3%	22
Family Foundations (12A)	1,571	1.3%	129	3,043	1.3%	127
Modest Income Homes (12D)	468	0.4%	32	896	0.4%	34
Diverse Convergence (13A)	0	0.0%	0	0	0.0%	0
Family Extensions (13B)	0	0.0%	0	0	0.0%	0
3. Metro Cities	52,184	44.3%	245	98,107	42.7%	254
In Style (5B)	16,976	14.4%	644	33,247	14.5%	684
Emerald City (8B)	4,494	3.8%	267	7,588	3.3%	266
Front Porches (8E)	4,312	3.7%	231	9,568	4.2%	274
Old and Newcomers (8F)	5,631	4.8%	209	10,122	4.4%	220
Hometown Heritage (8G)	2,182	1.9%	157	4,068	1.8%	162
Retirement Communities (9E)	662	0.6%	47	1,199	0.5%	49
Social Security Set (9F)	2,484	2.1%	252	3,604	1.6%	223
Young and Restless (11B)	1,906	1.6%	91	3,275	1.4%	100
Set to Impress (11D)	4,244	3.6%	260	7,990	3.5%	298
City Commons (11E)	4,823	4.1%	467	8,489	3.7%	490
Traditional Living (12B)	3,074	2.6%	138	6,107	2.7%	153
College Towns (14B)	1,396	1.2%	127	2,850	1.2%	124
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0

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Tapestry Segmentation Area Profile

Dauphin County, PA
 Dauphin County, PA
 Geography: County

Tapestry Urbanization Groups	2022 Households			2022 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	117,826	100.0%		229,974	100.0%	
4. Suburban Periphery	31,783	27.0%	84	65,428	28.5%	85
Top Tier (1A)	0	0.0%	0	0	0.0%	0
Professional Pride (1B)	930	0.8%	48	2,198	1.0%	52
Boomburbs (1C)	0	0.0%	0	0	0.0%	0
Savvy Suburbanites (1D)	4,249	3.6%	122	9,063	3.9%	122
Exurbanites (1E)	2,966	2.5%	131	6,531	2.8%	144
Urban Chic (2A)	0	0.0%	0	0	0.0%	0
Pleasantville (2B)	0	0.0%	0	0	0.0%	0
Enterprising Professionals (2D)	0	0.0%	0	0	0.0%	0
Workday Drive (4A)	1,291	1.1%	36	2,543	1.1%	34
Home Improvement (4B)	0	0.0%	0	0	0.0%	0
Comfortable Empty Nesters (5A)	5,862	5.0%	206	11,836	5.1%	211
Parks and Rec (5C)	10,960	9.3%	473	21,673	9.4%	487
Midlife Constants (5E)	1,586	1.3%	56	3,571	1.6%	67
Up and Coming Families (7A)	0	0.0%	0	0	0.0%	0
Silver & Gold (9A)	0	0.0%	0	0	0.0%	0
Golden Years (9B)	3,939	3.3%	253	8,013	3.5%	286
The Elders (9C)	0	0.0%	0	0	0.0%	0
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
5. Semirural	7,714	6.5%	70	14,378	6.3%	69
Middleburg (4C)	1,310	1.1%	36	2,570	1.1%	37
Heartland Communities (6F)	3,829	3.2%	148	7,039	3.1%	148
Farm to Table (7E)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	964	0.8%	71	1,898	0.8%	71
Small Town Sincerity (12C)	1,611	1.4%	76	2,871	1.2%	77
6. Rural	15,652	13.3%	82	31,936	13.9%	85
Green Acres (6A)	6,214	5.3%	162	13,081	5.7%	168
Salt of the Earth (6B)	7,086	6.0%	216	14,278	6.2%	223
The Great Outdoors (6C)	1,092	0.9%	60	2,220	1.0%	63
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Southern Satellites (10A)	1,260	1.1%	35	2,357	1.0%	33
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Economic BedRock (10C)	0	0.0%	0	0	0.0%	0
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

Source: Esri



LifeMode Group: GenXurban

In Style

5B

Households: 2,764,500

Average Household Size: 2.35

Median Age: 42.0

Median Household Income: \$73,000

WHO ARE WE?

In Style denizens embrace an urbane lifestyle that includes support of the arts, travel, and extensive reading. They are connected and make full use of the advantages of mobile devices. Professional couples or single households without children, they have the time to focus on their homes and their interests. The population is slightly older and already planning for their retirement.

OUR NEIGHBORHOOD

- City dwellers of large metropolitan areas.
- Married couples, primarily with no children (Index 112) or single households (Index 109); average household size at 2.35.
- Homeownership average at 68% (Index 108); nearly half, 47%, mortgaged (Index 114).
- Primarily single-family homes, in older neighborhoods (built before 1980), with a mix of townhomes (Index 132) and smaller (5–19 units) apartment buildings (Index 110).
- Median home value at \$243,900.
- Vacant housing units at 8.6%.

SOCIOECONOMIC TRAITS

- College educated: 48% are graduates (Index 155); 77% with some college education.
- Higher labor force participation rate is at 67% (Index 108) with proportionately more two-worker households (Index 110).
- Median household income of \$73,000 reveals an affluent market with income supplemented by investments (Index 142) and a substantial net worth (Index 178).
- Connected and knowledgeable, they carry smartphones and use many of the features.
- Attentive to price, they use coupons, especially mobile coupons.



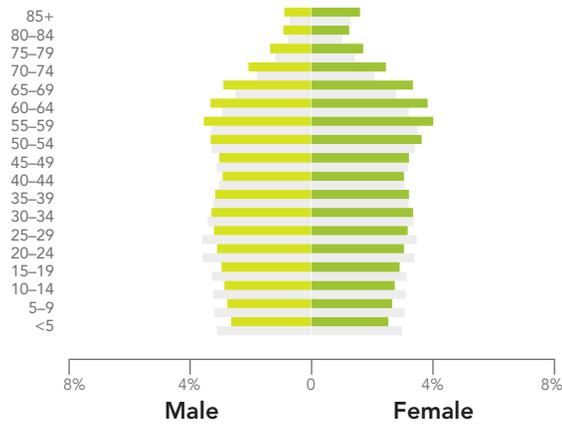
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by MRI-Simmons.



AGE BY SEX (Esri data)

Median Age: **42.0** US: 38.2

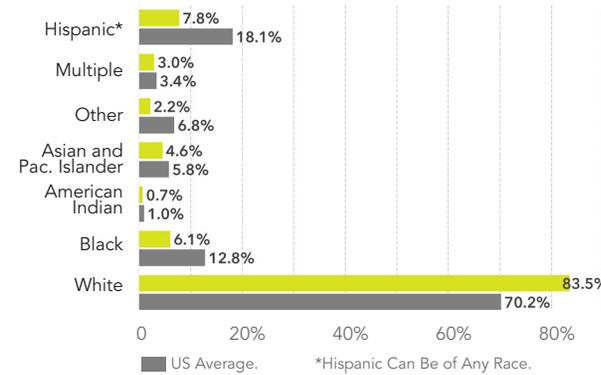
■ Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **39.8** US: 64.0



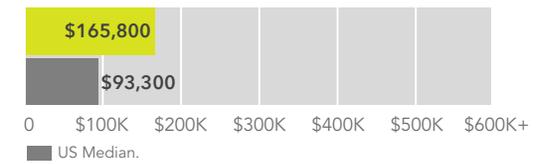
INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

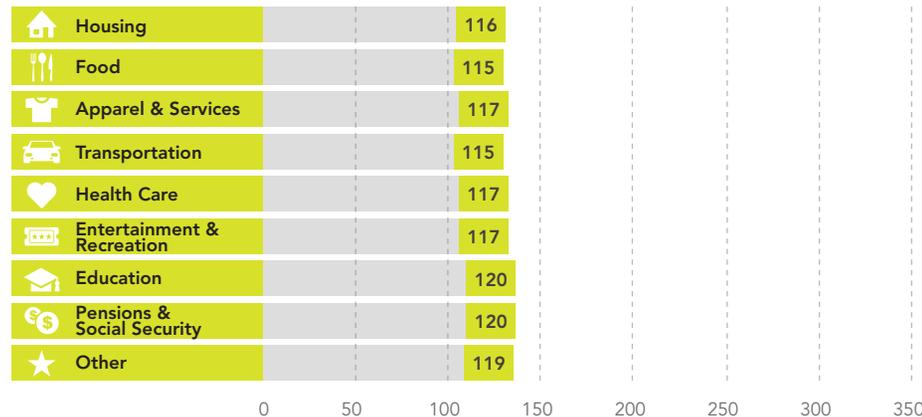


Median Net Worth



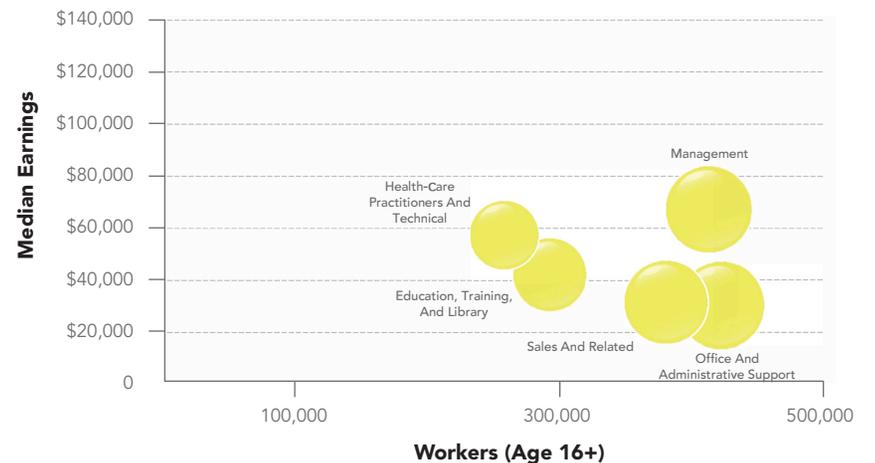
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- Partial to late model SUVs: compact SUVs are gaining popularity.
- Homes integral part of their style; invest in home remodeling/maintenance, DIY or contractors; housekeeping hired.
- Prefer organic foods, including growing their own vegetables.
- Financially active, own a variety of investments often managed by a financial planner.
- Meticulous planners, both well insured and well invested in retirement savings.
- Generous with support of various charities and causes.
- Actively support the arts, theater, concerts, and museums.

HOUSING

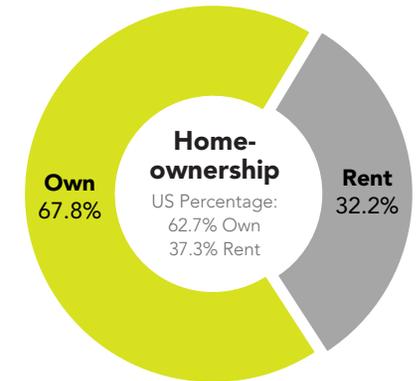
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

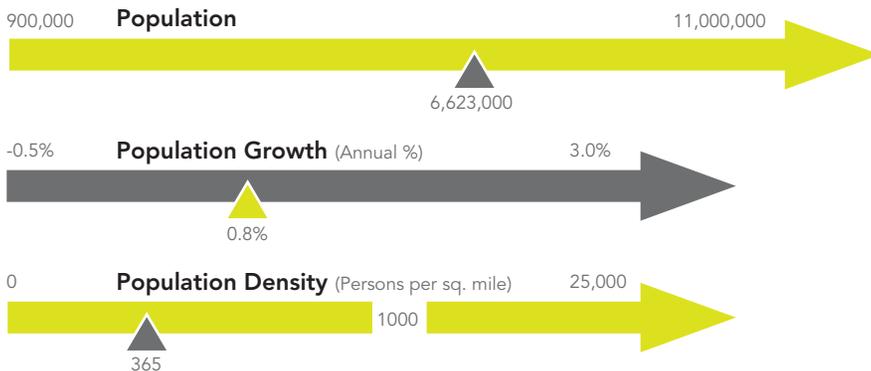
Median Value:
\$243,900

US Median: \$207,300



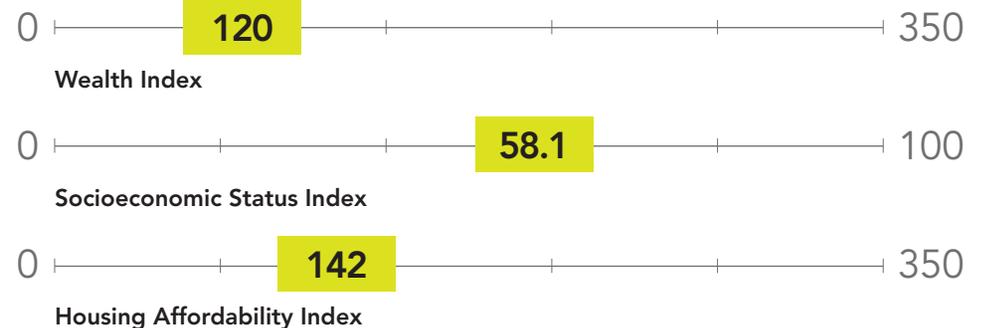
POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

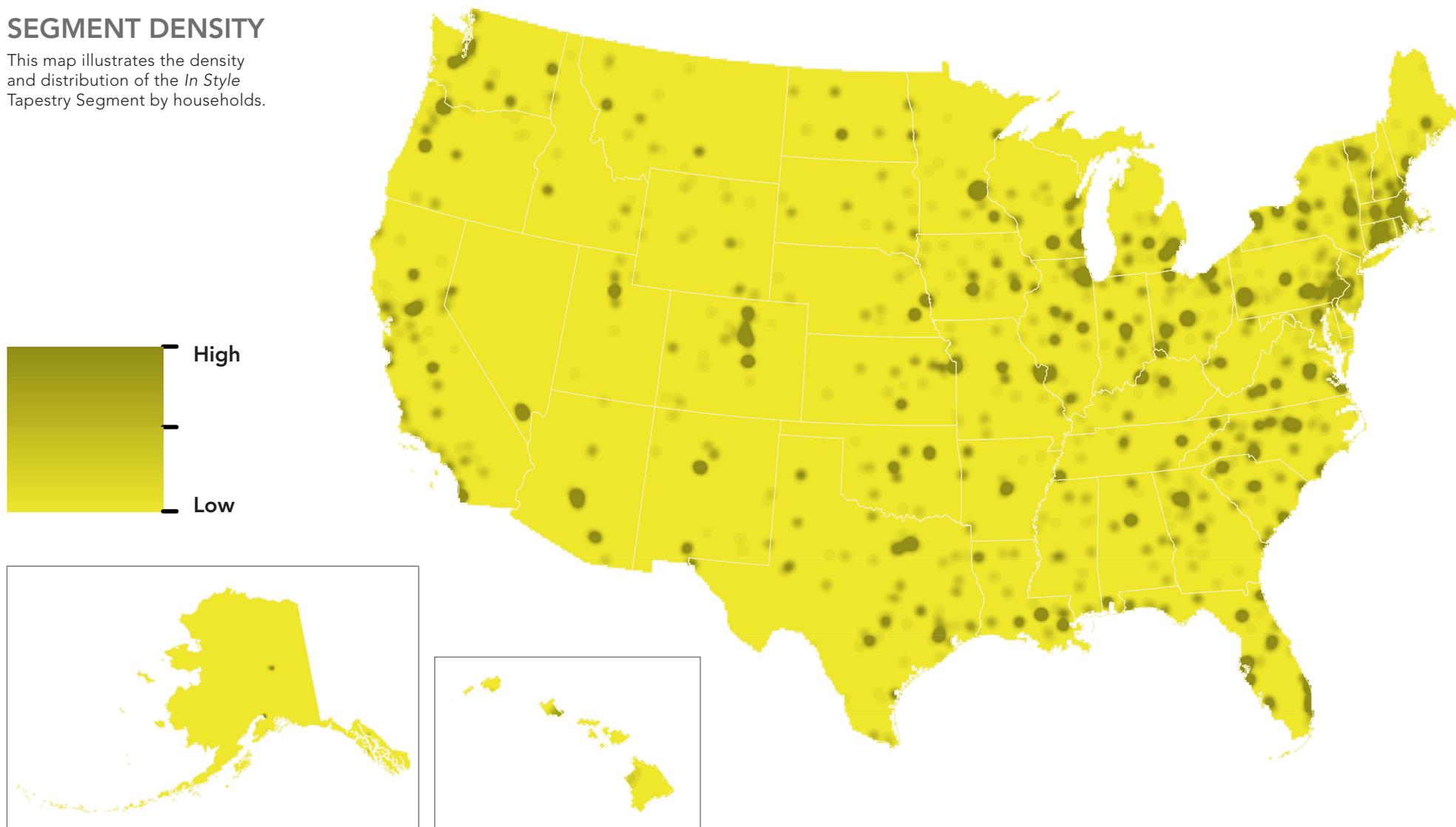
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the *In Style* Tapestry Segment by households.





LifeMode Group: GenXurban

Parks and Rec

5C

Households: 2,449,600

Average Household Size: 2.51

Median Age: 40.9

Median Household Income: \$60,000

WHO ARE WE?

These suburbanites have achieved the dream of home ownership. They have purchased homes that are within their means. Their homes are older, and townhomes and duplexes are not uncommon. Many of these families are two-income married couples approaching retirement age; they are comfortable in their jobs and their homes, budget wisely, but do not plan on retiring anytime soon or moving. Neighborhoods are well established, as are the amenities and programs that supported their now independent children through school and college. The appeal of these kid-friendly neighborhoods is now attracting a new generation of young couples.

OUR NEIGHBORHOOD

- Homes are primarily owner-occupied, single-family residences built prior to 1970; townhomes and duplexes are scattered through the neighborhoods.
- Both median home value and average rent are close to the national level.
- Households by type mirror the US distribution; married couples, more without children, dominate. Average household size is slightly lower at 2.51, but this market is also a bit older.

SOCIOECONOMIC TRAITS

- More than half of the population is college educated.
- Older residents draw Social Security and retirement income.
- The workforce is diverse: professionals in health care, retail trade, and education, or skilled workers in manufacturing and construction.
- This is a financially shrewd market; consumers are careful to research their big-ticket purchases.
- When planning trips, they search for discounted airline fares and hotels and choose to vacation within the US.
- These residents tend to use their cell phones for calls and texting only.



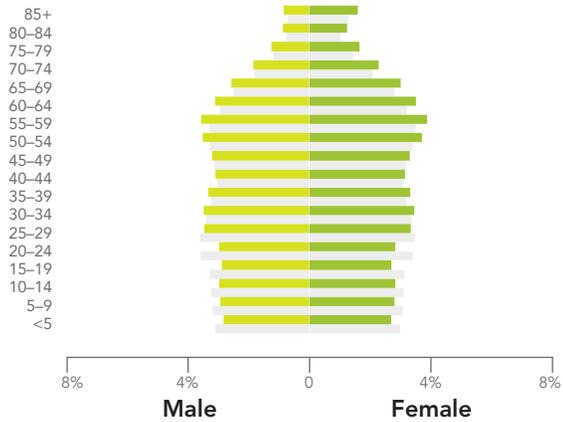
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by MRI-Simmons.



AGE BY SEX (Esri data)

Median Age: **40.9** US: 38.2

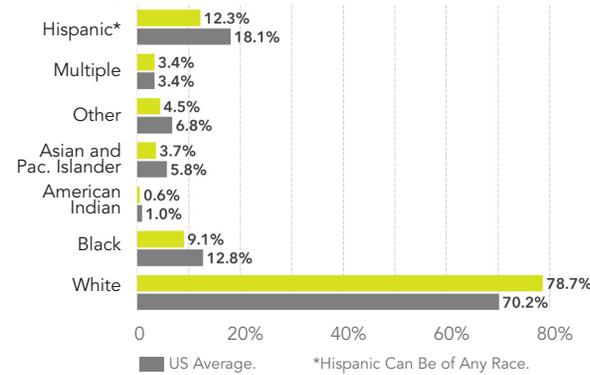
■ Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **50.7** US: 64.0



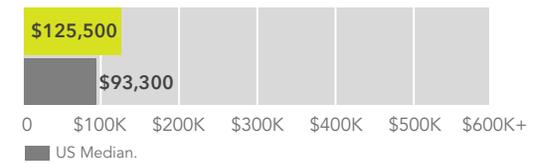
INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

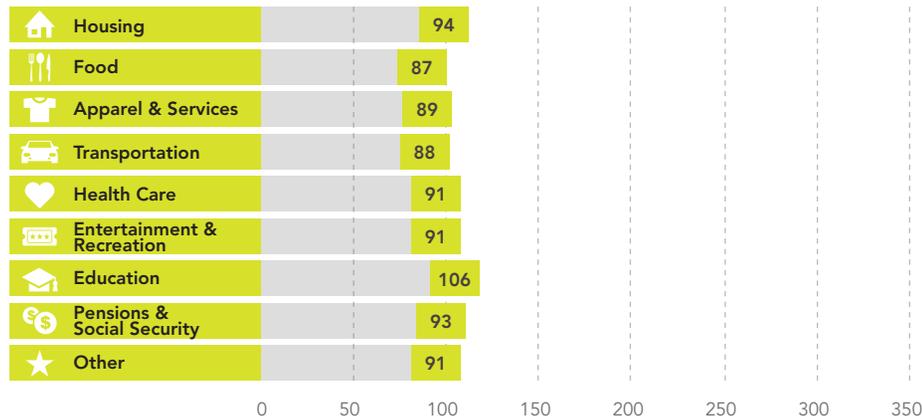


Median Net Worth



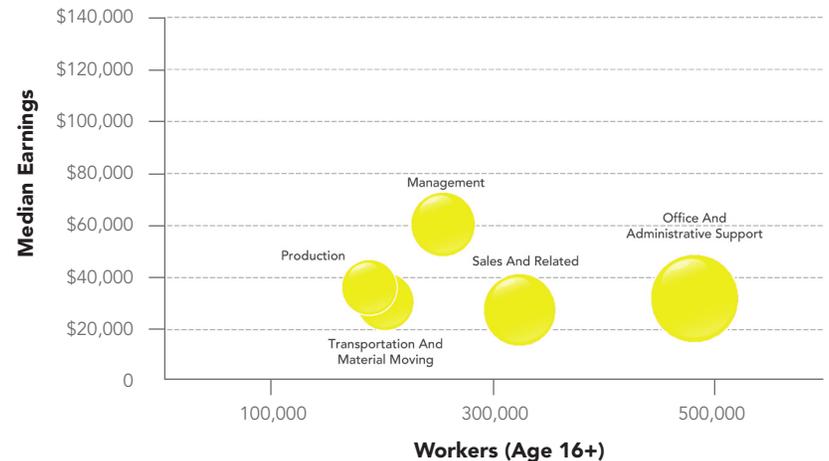
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- Cost and practicality come first when purchasing a vehicle; *Parks and Rec* residents are more likely to buy SUVs or trucks over compact or subcompact vehicles.
- Budget-conscious consumers stock up on staples at warehouse clubs.
- Pass time at home watching documentaries on Animal Planet, Discovery, or History channels. For an outing, they choose to dine out at family-style restaurants and attend movies.
- Convenience is important in the kitchen; they regularly use frozen or packaged main course meals. Ground coffee is preferred over coffee beans.
- Residents here take advantage of local parks and recreational activities. Their exercise routine is a balance of home-based exercise; a session at their local community gym; or a quick jog, swim, or run.

HOUSING

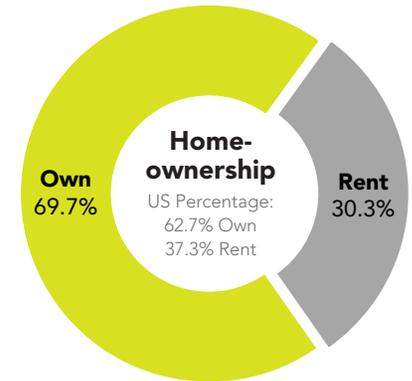
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
 Single Family

Median Value:
 \$198,500

US Median: \$207,300



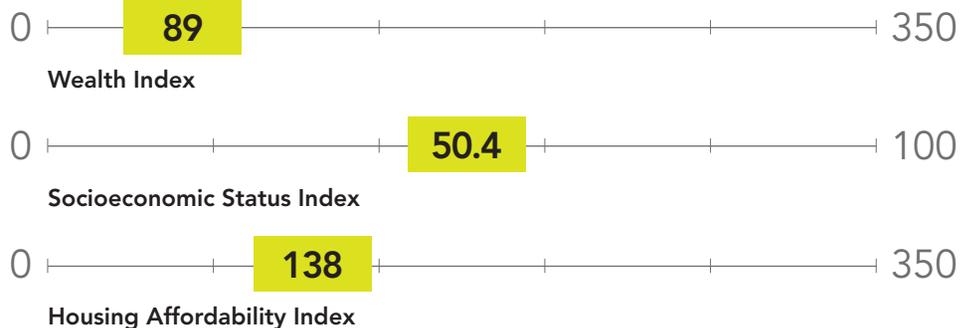
POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

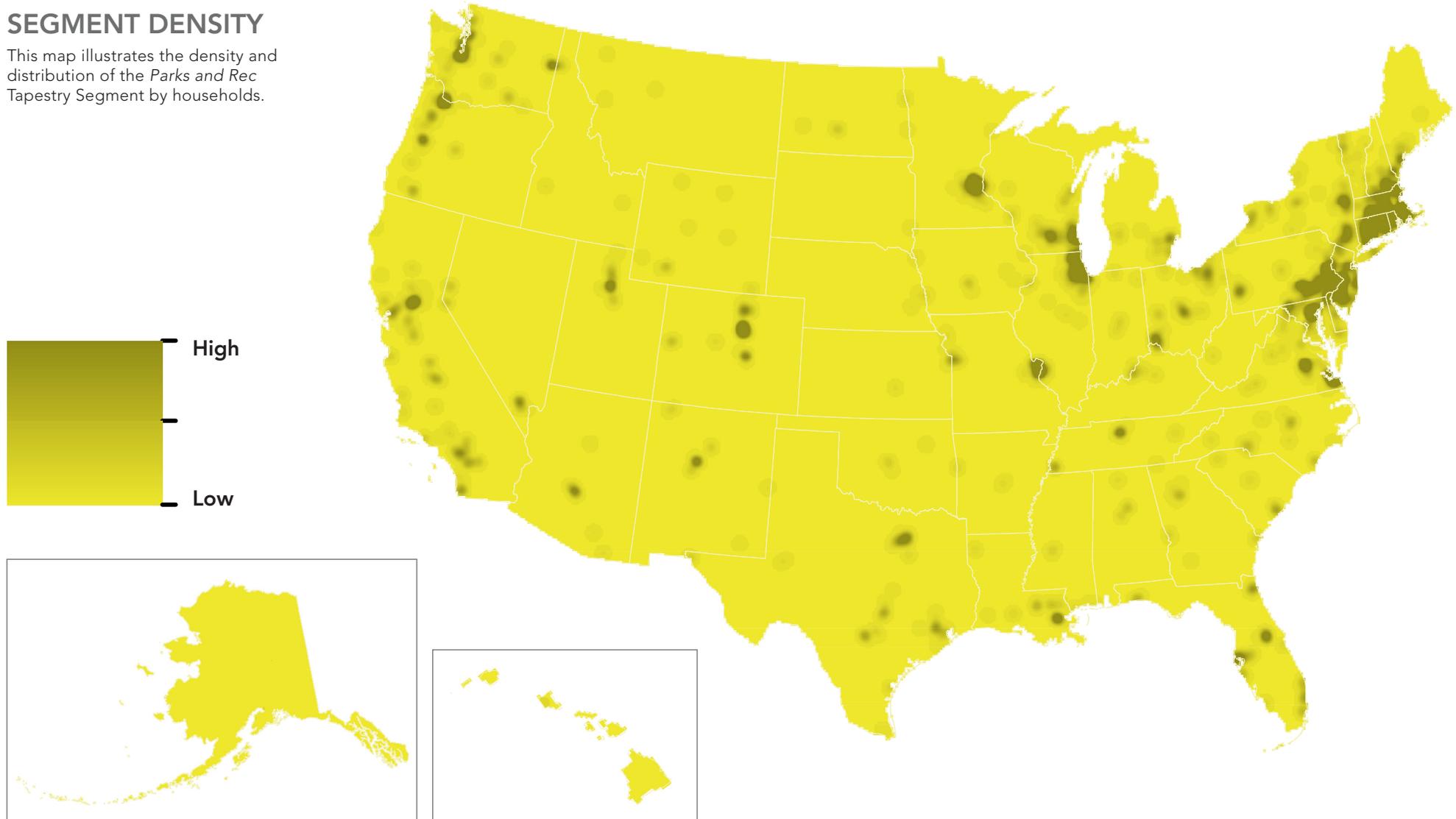
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.

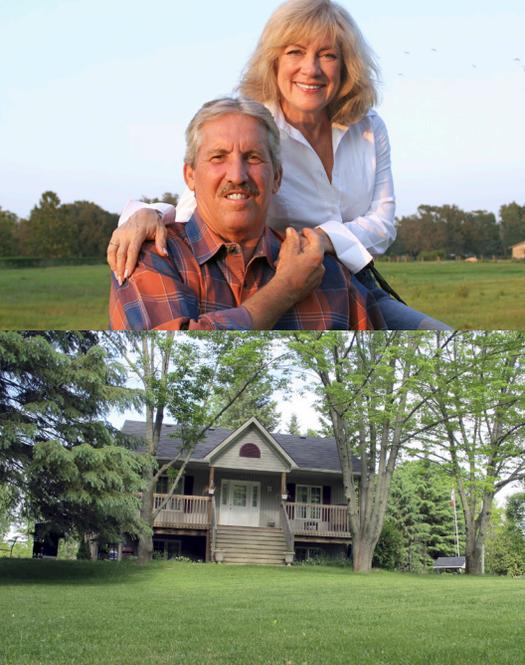




SEGMENT DENSITY

This map illustrates the density and distribution of the *Parks and Rec* Tapestry Segment by households.





LifeMode Group: Cozy Country Living

Salt of the Earth

6B

Households: 3,545,800

Average Household Size: 2.59

Median Age: 44.1

Median Household Income: \$56,300

WHO ARE WE?

Salt of the Earth residents are entrenched in their traditional, rural lifestyles. Citizens here are older, and many have grown children that have moved away. They still cherish family time and also tending to their vegetable gardens and preparing homemade meals. Residents embrace the outdoors; they spend most of their free time preparing for their next fishing, boating, or camping trip. The majority has at least a high school diploma or some college education; many have expanded their skill set during their years of employment in the manufacturing and related industries. They may be experts with DIY projects, but the latest technology is not their forte. They use it when absolutely necessary, but seek face-to-face contact in their routine activities.

OUR NEIGHBORHOOD

- This large segment is concentrated in the Midwest, particularly in Ohio, Pennsylvania, and Indiana.
- Due to their rural setting, households own two vehicles to cover their long commutes, often across county boundaries.
- Homeownership rates are very high (Index 133). Single-family homes are affordable, valued at 25% less than the national market.
- Nearly two in three households are composed of married couples; less than half have children at home.

SOCIOECONOMIC TRAITS

- Steady employment in construction, manufacturing, and related service industries.
- Completed education: 40% with a high school diploma only.
- Household income just over the national median, while net worth is nearly double the national median.
- Spending time with family is their top priority.
- Cost-conscious consumers, loyal to brands they like, with a focus on buying American.
- Last to buy the latest and greatest products.
- Try to eat healthy, tracking the nutrition and ingredients in the food they purchase.



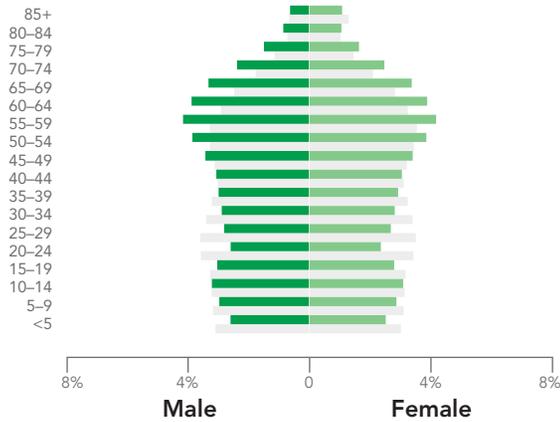
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by MRI-Simmons.



AGE BY SEX (Esri data)

Median Age: 44.1 US: 38.2

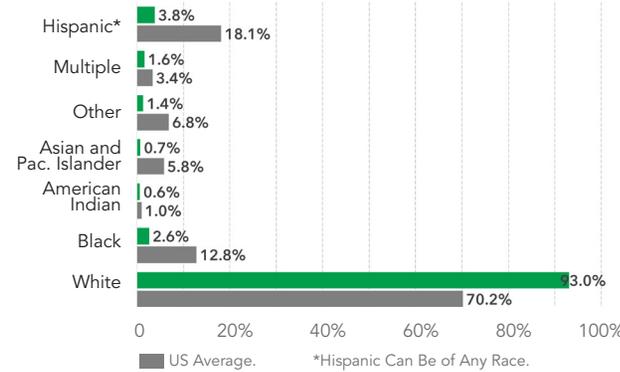
■ Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: 19.8 US: 64.0



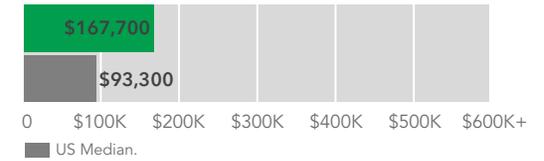
INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

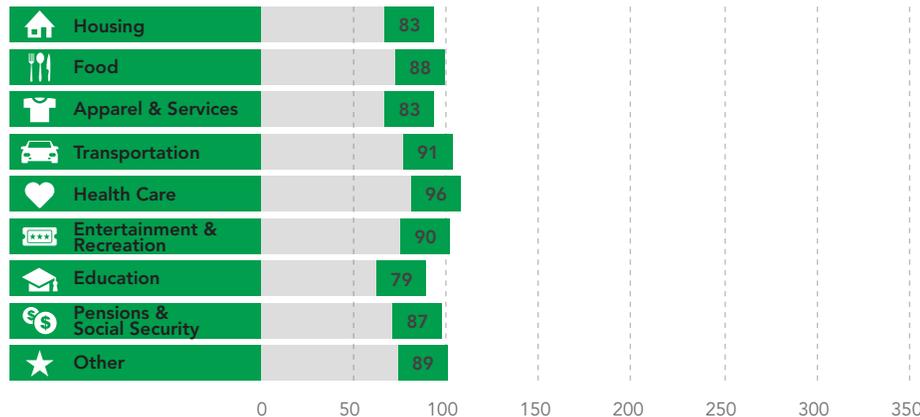


Median Net Worth



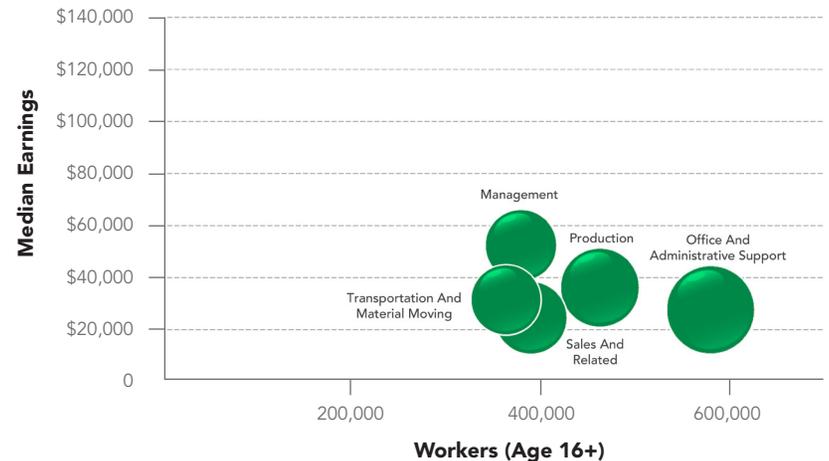
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- Outdoor sports and activities, such as fishing, boating, hunting, and overnight camping trips, are popular.
- To support their pastimes, truck ownership is high; many also own an ATV.
- They own the equipment to maintain their lawns and tend to their vegetable gardens.
- Residents often tackle home remodeling and improvement jobs themselves.
- Due to their locale, they own satellite dishes and have access to high-speed internet connections like DSL.
- These conservative consumers prefer to conduct their business in person rather than online. They use an agent to purchase insurance.

HOUSING

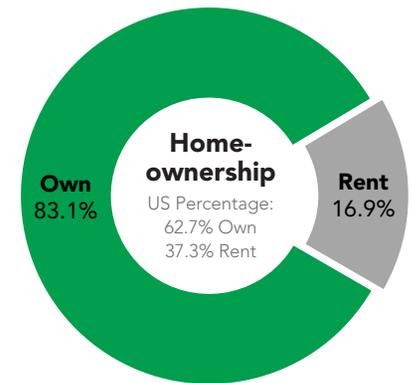
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

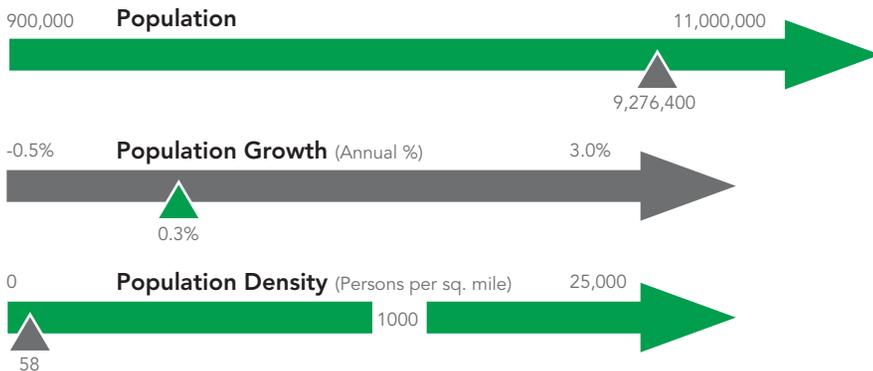
Median Value:
\$154,300

US Median: \$207,300



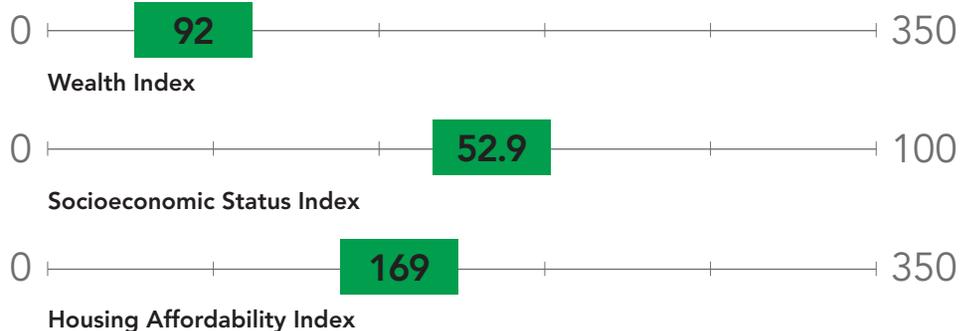
POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





LifeMode Group: Cozy Country Living

Salt of the Earth

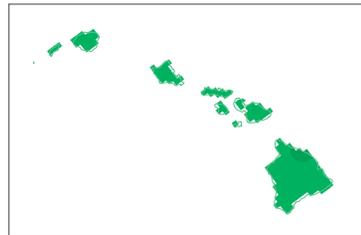
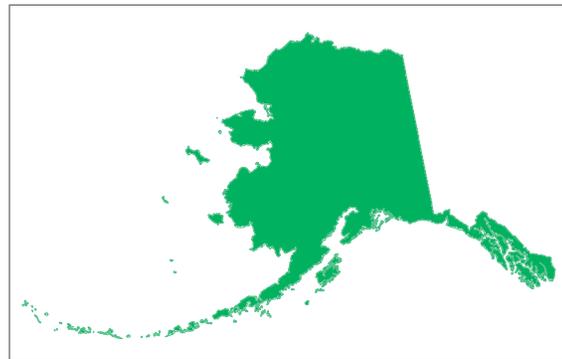
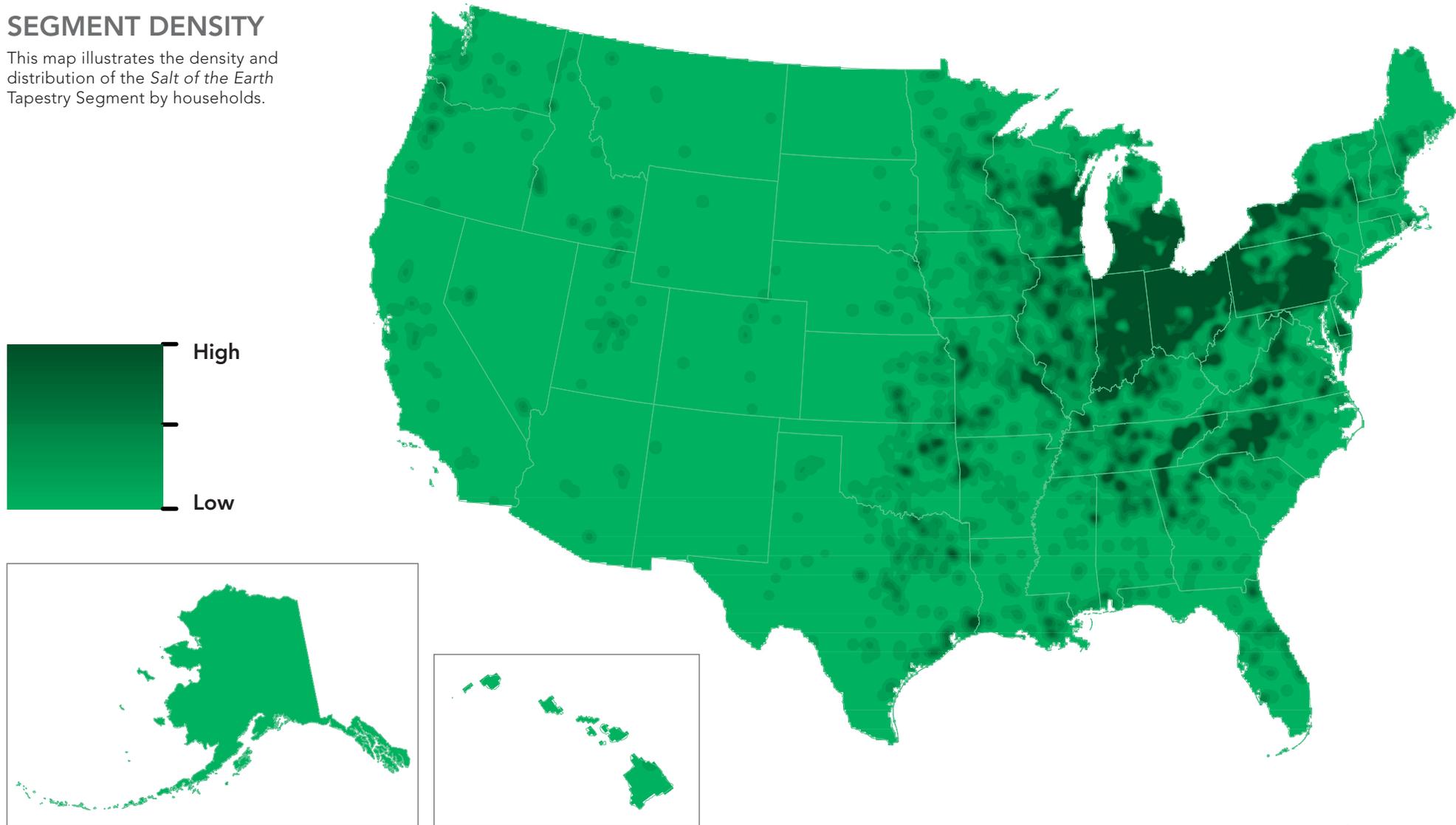


TAPESTRY
SEGMENTATION

esri.com/tapestry

SEGMENT DENSITY

This map illustrates the density and distribution of the *Salt of the Earth* Tapestry Segment by households.



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LifeMode Group: Cozy Country Living

Green Acres

6A

Households: 3,923,400

Average Household Size: 2.70

Median Age: 43.9

Median Household Income: \$76,800

WHO ARE WE?

The *Green Acres* lifestyle features country living and self-reliance. Avid do-it-yourselfers, they maintain and remodel their homes with all the necessary power tools to accomplish the jobs. Gardening, especially growing vegetables, is a priority, again with the right tools, tillers, tractors, and riding mowers. Outdoor living features a variety of sports: hunting and fishing, motorcycling, hiking and camping, and even golf.

OUR NEIGHBORHOOD

- This large segment is concentrated in rural enclaves in metropolitan areas.
- Primarily (not exclusively) older homes with acreage; new housing growth in the past 15 years.
- Single-family, owner-occupied housing, with a median value of \$235,500.
- An older market, primarily married couples, most with no children.

SOCIOECONOMIC TRAITS

- Education: More than 60% are college educated.
- Labor force participation rate is high at 66.8% (Index 107).
- Income is derived not only from wages and salaries but also from self-employment (more than 13% of households), investments (27% of households), and increasingly, from retirement.
- They are cautious consumers with a focus on quality and durability.
- Comfortable with technology, more as a tool than a trend: banking or paying bills online is convenient; but the internet is not viewed as entertainment.
- Economic outlook is professed as pessimistic, but consumers are comfortable with debt, primarily as home and auto loans, and investments.



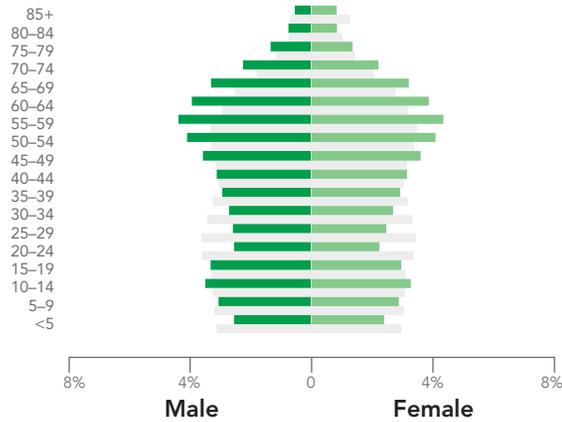
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by MRI-Simmons.



AGE BY SEX (Esri data)

Median Age: **43.9** US: 38.2

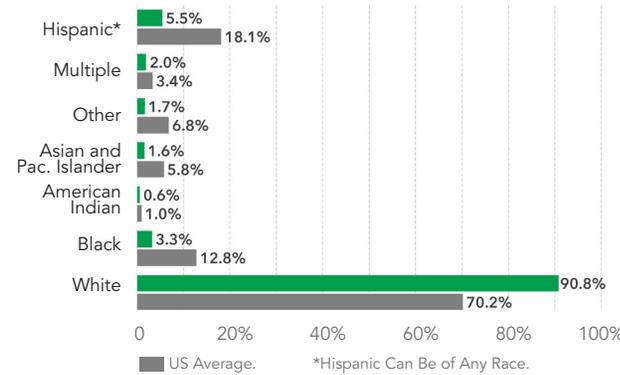
■ Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **26.0** US: 64.0



INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

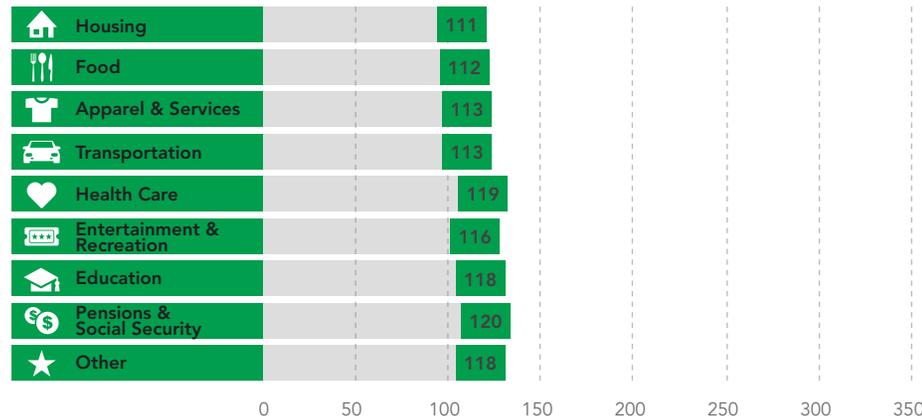


Median Net Worth



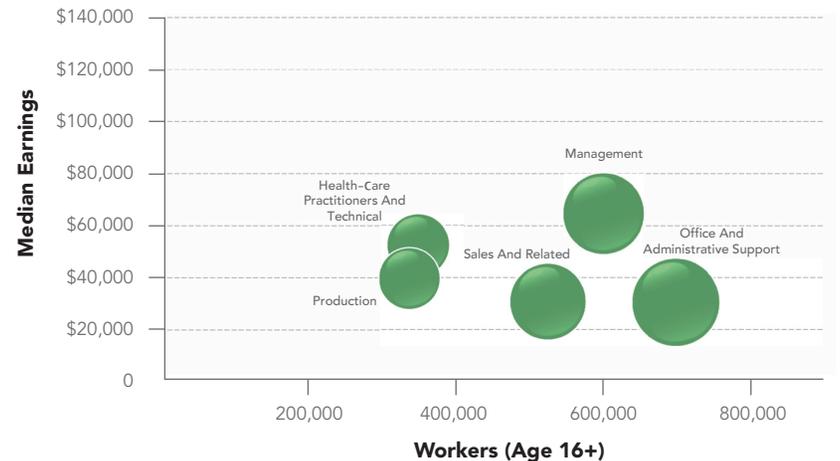
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- Purchasing choices reflect *Green Acres* residents' country life, including a variety of vehicles, from trucks and SUVs to ATVs and motorcycles, preferably late model.
- Homeowners favor DIY home improvement projects and gardening.
- Media of choice are provided by satellite service, radio, and television, also with an emphasis on country and home and garden.
- *Green Acres* residents pursue physical fitness vigorously, from working out on home exercise equipment to playing a variety of sports.
- Residents are active in their communities and a variety of social organizations, from charitable to veterans' clubs.

HOUSING

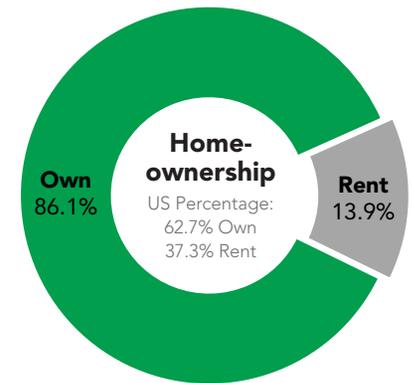
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

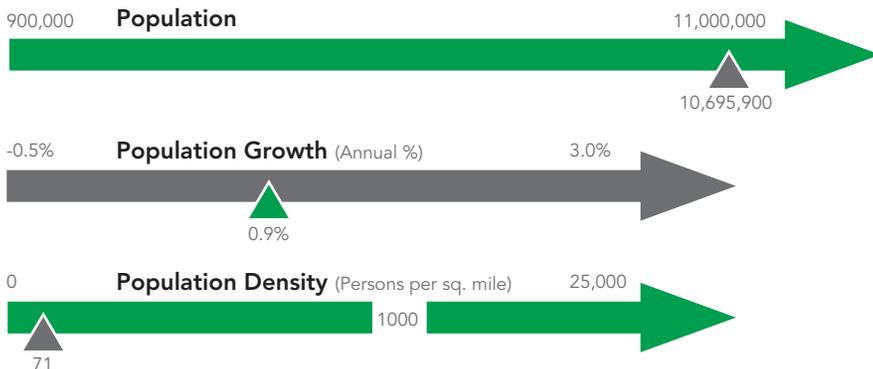
Median Value:
\$235,500

US Median: \$207,300



POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





LifeMode Group: Cozy Country Living

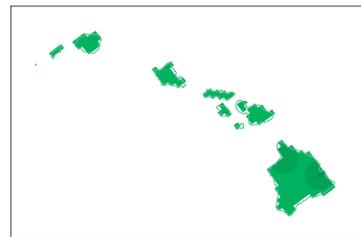
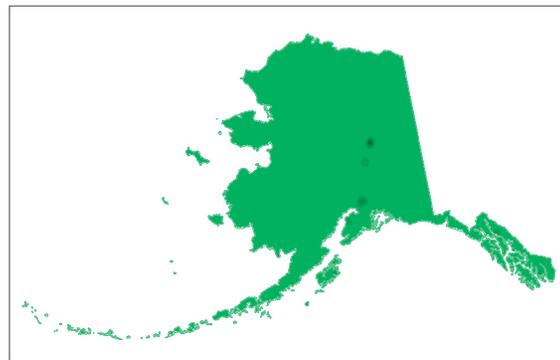
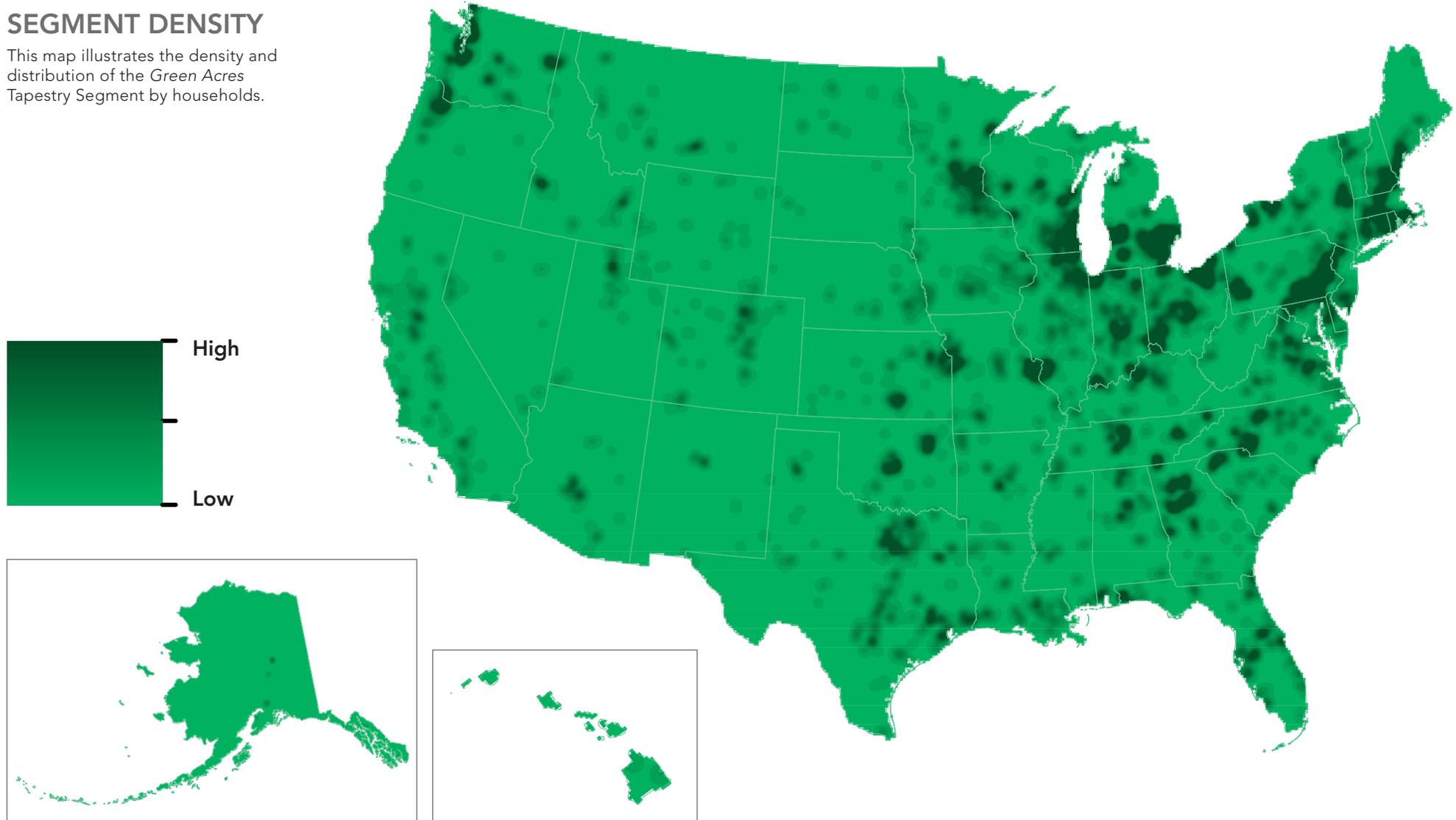
Green Acres



TAPESTRY
SEGMENTATION
esri.com/tapestry

SEGMENT DENSITY

This map illustrates the density and distribution of the *Green Acres* Tapestry Segment by households.





LifeMode Group: GenXurban

Comfortable Empty Nesters



Households: 3,024,200

Average Household Size: 2.52

Median Age: 48.0

Median Household Income: \$75,000

WHO ARE WE?

Residents in this large, growing segment are older, with nearly half of all householders aged 55 or older; many still live in the suburbs where they grew up. Most are professionals working in government, health care, or manufacturing. These Baby Boomers are earning a comfortable living and benefitting from years of prudent investing and saving. Their net worth is well above average (Index 314). Many are enjoying the transition from child rearing to retirement. They value their health and financial well-being.

OUR NEIGHBORHOOD

- Married couples, some with children, but most without (Index 149).
- Average household size slightly higher at 2.52.
- Found throughout the suburbs and small towns of metropolitan areas, where most residents own and live in single-family detached homes (Index 142).
- Most homes built between 1950 and 1990 (Index 131).
- Households generally have one or two vehicles.

SOCIOECONOMIC TRAITS

- Education: 36% college graduates; nearly 68% with some college education.
- Average labor force participation at 61%.
- Most households' income from wages or salaries, but a third also draw income from investments (Index 150) and retirement (Index 159).
- *Comfortable Empty Nesters* residents physically and financially active.
- Prefer eating at home instead of dining out.
- Home maintenance a priority among these homeowners.



Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by MRI-Simmons.

Comfortable Empty Nesters



AGE BY SEX (Esri data)

Median Age: **48.0** US: 38.2

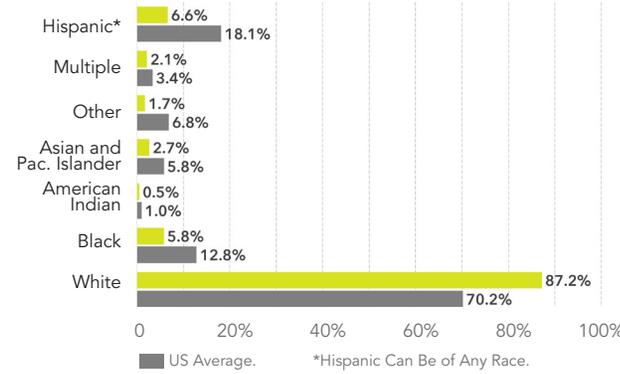
■ Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **33.0** US: 64.0



INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

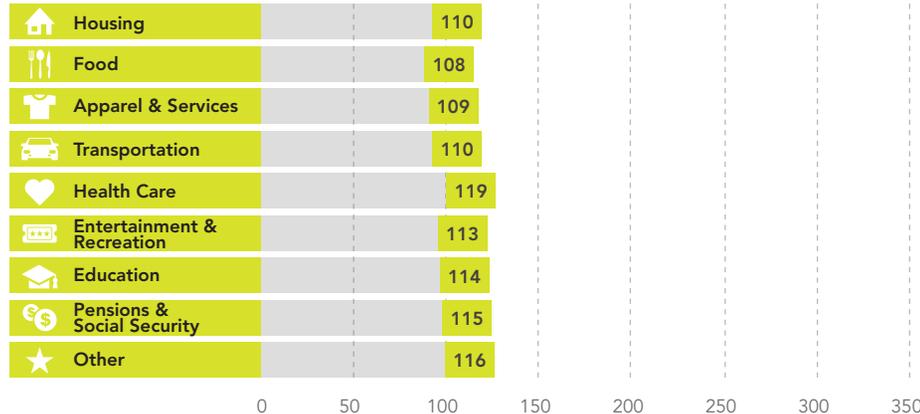


Median Net Worth



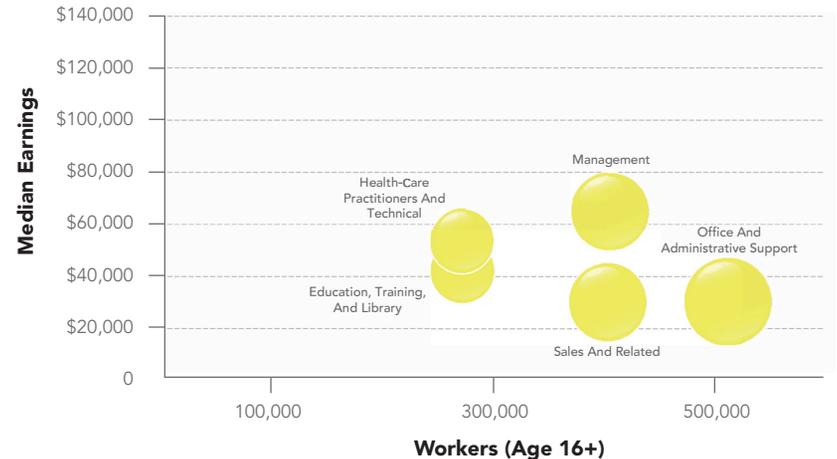
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- Residents enjoy listening to sports radio or watching sports on television.
- Physically active, they play golf, ski, ride bicycles, and work out regularly.
- Spending a lot of time online isn't a priority, so most own older home computers.
- Financial portfolio includes stocks, certificates of deposit, mutual funds, and real estate.

HOUSING

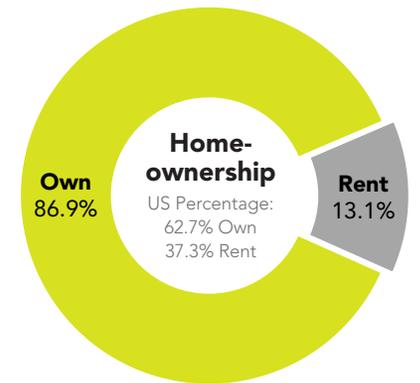
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

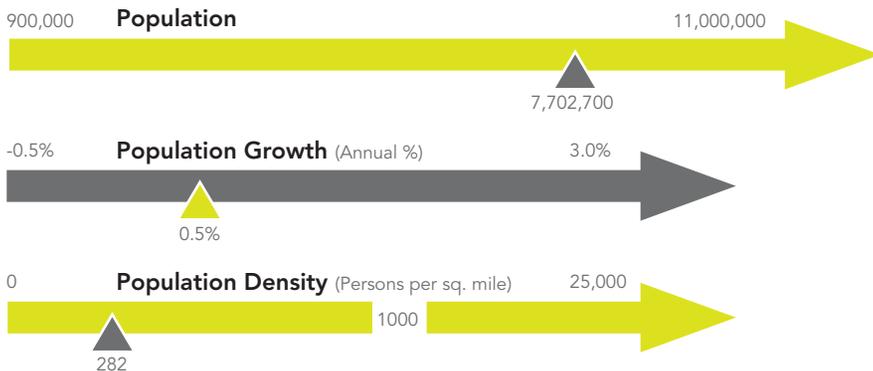
Median Value:
\$203,400

US Median: \$207,300



POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.



Comfortable Empty Nesters



SEGMENT DENSITY

This map illustrates the density and distribution of the *Comfortable Empty Nesters* Tapestry Segment by households.

