

FAYETTE COUNTY, PENNSYLVANIA HOUSING NEEDS ASSESSMENT

JANUARY 2024



BOWEN
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RESEARCH

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Scope of Work

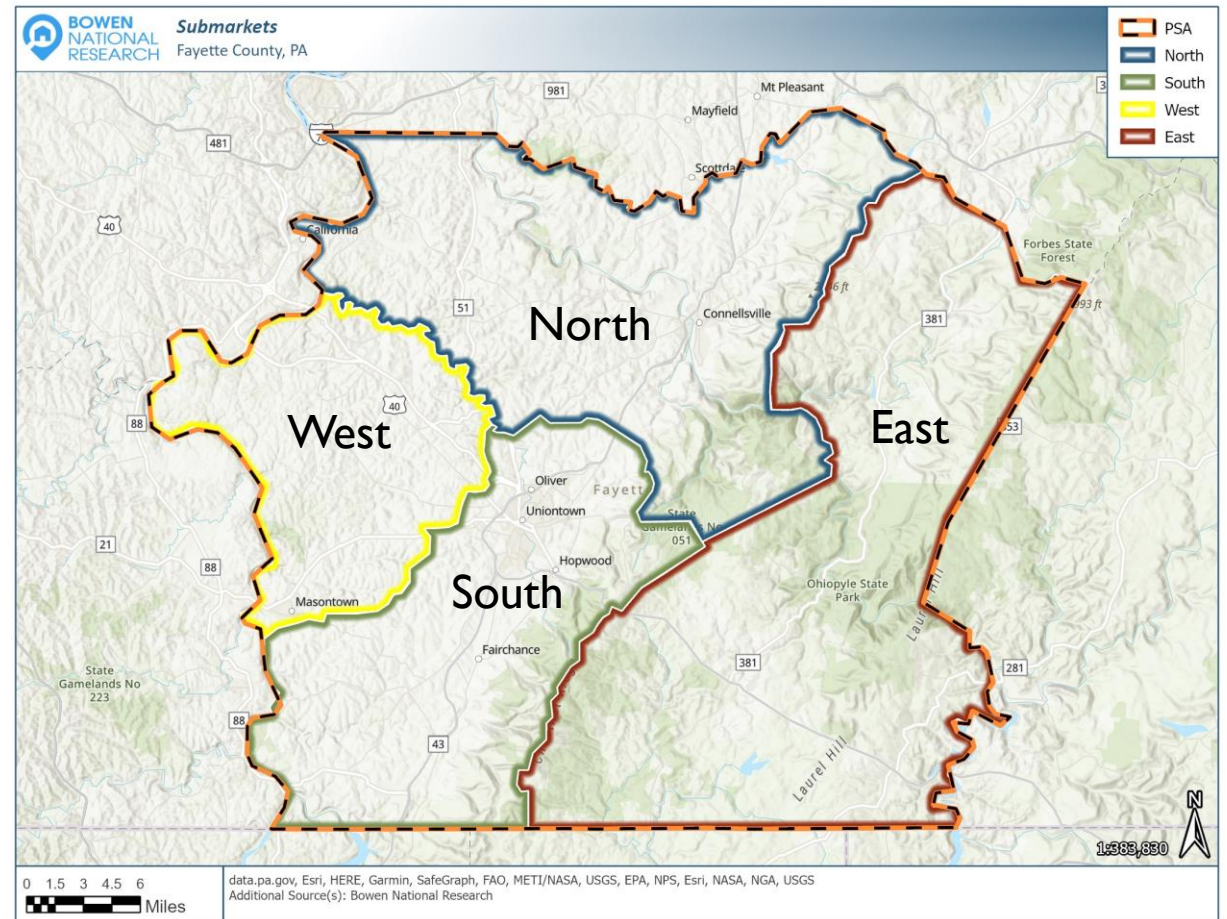
- Demographic Characteristics and Trends
- Economic Conditions and Trends
- Existing Housing Stock Costs, Availability, and Conditions
- Quantified Housing Gap Estimates
- Community Input (Stakeholders, Employers, Residents/Commuters and Developers/Builders Surveys)
Roughly 500 Points of Contact Made
- Action Plan Recommendations



Geographical Study Areas

Primary Study Area (PSA) Fayette County

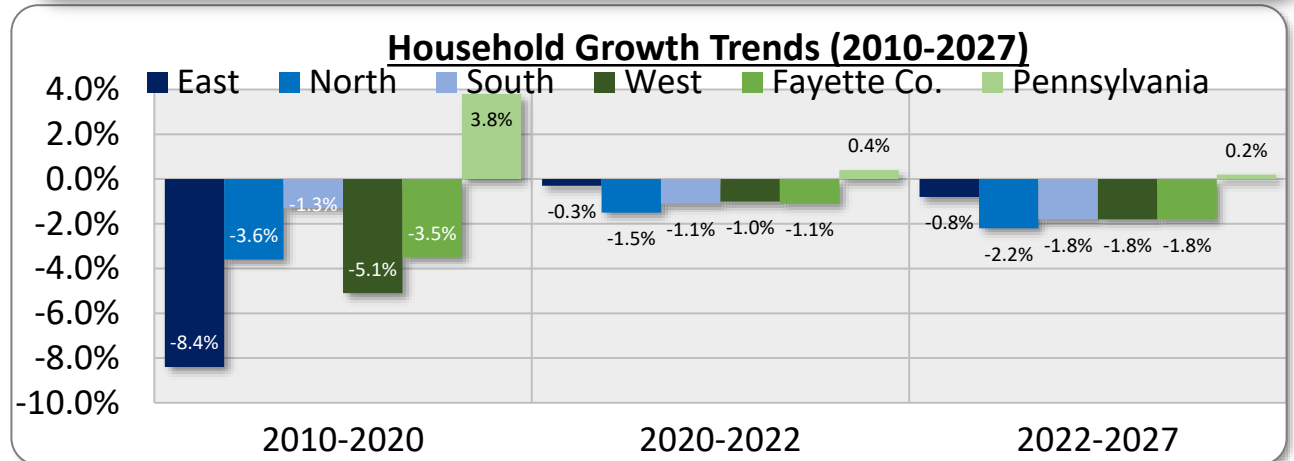
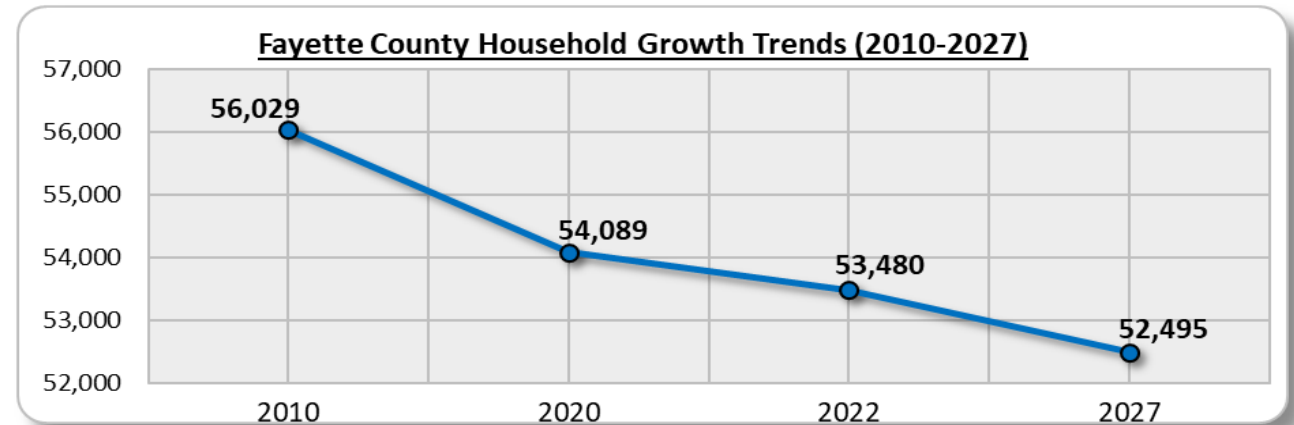
Submarkets
North, East, South and West
submarkets within the county



Demographics – Household Trends

	Total Households									
	2010 Census	2020 Census	Change 2010-2020		2022 Estimated	Change 2020-2022		2027 Projected	Change 2022-2027	
			Number	Percent		Number	Percent		Number	Percent
Fayette County	56,029	54,089	-1,940	-3.5%	53,480	-609	-1.1%	52,495	-985	-1.8%
Pennsylvania	5,018,902	5,210,567	191,665	3.8%	5,232,753	22,186	0.4%	5,244,358	11,605	0.2%

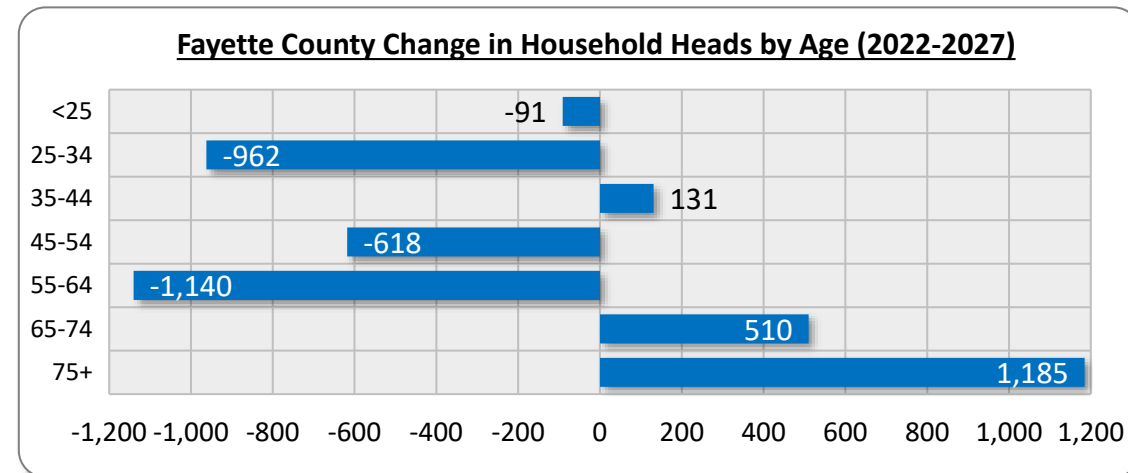
Between 2010 and 2022, the number of households within the PSA (Fayette County) decreased by 2,549 (4.5%); Over the next five years, the **number of households** within the county is projected to **decrease by 985 (-1.8%)**. The **East Submarket** will have the smallest decline out of the four submarkets, with a projected household decline of **0.8%**.



Demographics – Households By Age

County projections through 2027 indicate the **greatest growth** of household heads by age will occur among seniors ages **65 and older**, with notable growth to occur among households between the ages of **35 and 44**. These **trends mirror** projected growth expected for **Pennsylvania** during this period.

		Household Heads by Age						
		<25	25 to 34	35 to 44	45 to 54	55 to 64	65 to 74	75+
Fayette County	2010	1,630 (2.9%)	6,115 (10.9%)	8,912 (15.9%)	11,448 (20.4%)	11,610 (20.7%)	7,836 (14.0%)	8,478 (15.1%)
	2022	1,225 (2.3%)	6,219 (11.6%)	7,305 (13.7%)	8,553 (16.0%)	10,913 (20.4%)	10,875 (20.3%)	8,390 (15.7%)
	2027	1,134 (2.2%)	5,257 (10.0%)	7,436 (14.2%)	7,935 (15.1%)	9,773 (18.6%)	11,385 (21.7%)	9,575 (18.2%)
	Change 2022-2027	-91 (-7.4%)	-962 (-15.5%)	131 (1.8%)	-618 (-7.2%)	-1,140 (-10.4%)	510 (4.7%)	1,185 (14.1%)
Pennsylvania	2010	199,377 (4.0%)	673,750 (13.4%)	843,476 (16.8%)	1,078,037 (21.5%)	957,835 (19.1%)	613,827 (12.2%)	652,600 (13.0%)
	2022	169,344 (3.2%)	715,762 (13.7%)	808,584 (15.5%)	857,895 (16.4%)	1,041,285 (19.9%)	900,172 (17.2%)	739,711 (14.1%)
	2027	164,084 (3.1%)	663,174 (12.6%)	849,442 (16.2%)	815,984 (15.6%)	938,819 (17.9%)	961,600 (18.3%)	851,255 (16.2%)
	Change 2022-2027	-5,260 (-3.1%)	-52,588 (-7.3%)	40,858 (5.1%)	-41,911 (-4.9%)	-102,466 (-9.8%)	61,428 (6.8%)	111,544 (15.1%)



These trends will drive demand for family- and senior-oriented product.

Demographics – Renter Household Income

Approximately
49.6% of PSA renter
households earn
less than \$30k
annually, while most of
the renter household
growth within the
county will be among
those earning \$50k
or more.

		Renter Households by Income							
		<\$10,000	\$10,000 - \$19,999	\$20,000 - \$29,999	\$30,000 - \$39,999	\$40,000 - \$49,999	\$50,000 - 59,999	\$60,000 - \$99,999	\$100,000+
Fayette County	2010	2,971 (18.9%)	5,074 (32.2%)	3,012 (19.1%)	1,443 (9.2%)	1,037 (6.6%)	679 (4.3%)	1,295 (8.2%)	245 (1.6%)
	2022	2,020 (14.3%)	2,944 (20.8%)	2,048 (14.5%)	1,617 (11.4%)	1,341 (9.5%)	798 (5.6%)	2,157 (15.2%)	1,227 (8.7%)
	2027	1,593 (11.8%)	2,355 (17.5%)	1,723 (12.8%)	1,403 (10.4%)	1,206 (8.9%)	871 (6.5%)	2,423 (18.0%)	1,915 (14.2%)
	Change 2022-'27	-427 (-21.1%)	-589 (-20.0%)	-325 (-15.9%)	-214 (-13.2%)	-135 (-10.1%)	73 (9.1%)	266 (12.3%)	688 (56.1%)
Pennsylvania	2010	231,169 (15.1%)	320,775 (21.0%)	246,347 (16.1%)	187,112 (12.3%)	151,830 (9.9%)	100,847 (6.6%)	213,620 (14.0%)	75,480 (4.9%)
	2022	166,592 (10.1%)	227,393 (13.8%)	199,360 (12.1%)	183,085 (11.1%)	161,624 (9.8%)	126,013 (7.7%)	348,015 (21.2%)	230,564 (14.0%)
	2027	132,126 (8.2%)	179,811 (11.1%)	167,660 (10.4%)	163,693 (10.1%)	147,820 (9.1%)	124,763 (7.7%)	389,065 (24.0%)	313,547 (19.4%)
	Change 2022-'27	-34,466 (-20.7%)	-47,582 (-20.9%)	-31,700 (-15.9%)	-19,392 (-10.6%)	-13,804 (-8.5%)	-1,250 (-1.0%)	41,050 (11.8%)	82,983 (36.0%)

The large share of lower-income renter households and the increase of moderate/higher income earning renter households within Fayette County through 2027 indicates the importance of providing a wide range of rental housing alternatives.

Demographics – Owner Household Income

Over half of owner households in Fayette County earn \$60k+ annually.

All owner household growth in Fayette County and the four submarkets (not shown in table) will occur among those earning \$60k or more (PSA increase of 2,250 HHs or by 10.6%).

		Owner Households by Income							
		<\$10,000	\$10,000 - \$19,999	\$20,000 - \$29,999	\$30,000 - \$39,999	\$40,000 - \$49,999	\$50,000 - \$59,999	\$60,000 - \$99,999	\$100,000+
Fayette County	2010	2,722 (6.8%)	5,857 (14.5%)	6,002 (14.9%)	4,670 (11.6%)	3,926 (9.7%)	4,004 (9.9%)	9,058 (22.5%)	4,032 (10.0%)
	2022	1,605 (4.1%)	3,042 (7.7%)	3,665 (9.3%)	3,849 (9.8%)	3,416 (8.7%)	2,550 (6.5%)	10,194 (25.9%)	11,011 (28.0%)
	2027	1,296 (3.3%)	2,422 (6.2%)	3,108 (8.0%)	3,464 (8.9%)	3,138 (8.0%)	2,127 (5.5%)	10,410 (26.7%)	13,045 (33.4%)
	Change 2022-'27	-309 (-19.3%)	-620 (-20.4%)	-557 (-15.2%)	-385 (-10.0%)	-278 (-8.1%)	-423 (-16.6%)	216 (2.1%)	2,034 (18.5%)
Pennsylvania	2010	141,603 (4.1%)	269,419 (7.7%)	327,881 (9.4%)	335,917 (9.6%)	319,191 (9.1%)	330,816 (9.5%)	908,226 (26.0%)	858,669 (24.6%)
	2022	93,336 (2.6%)	163,936 (4.6%)	207,186 (5.8%)	238,255 (6.6%)	235,083 (6.5%)	258,314 (7.2%)	881,572 (24.6%)	1,512,425 (42.1%)
	2027	76,600 (2.1%)	130,673 (3.6%)	170,006 (4.7%)	201,649 (5.6%)	199,872 (5.5%)	226,800 (6.3%)	841,463 (23.2%)	1,778,810 (49.1%)
	Change 2022-'27	-16,736 (-17.9%)	-33,263 (-20.3%)	-37,180 (-17.9%)	-36,606 (-15.4%)	-35,211 (-15.0%)	-31,514 (-12.2%)	-40,109 (-4.5%)	266,385 (17.6%)

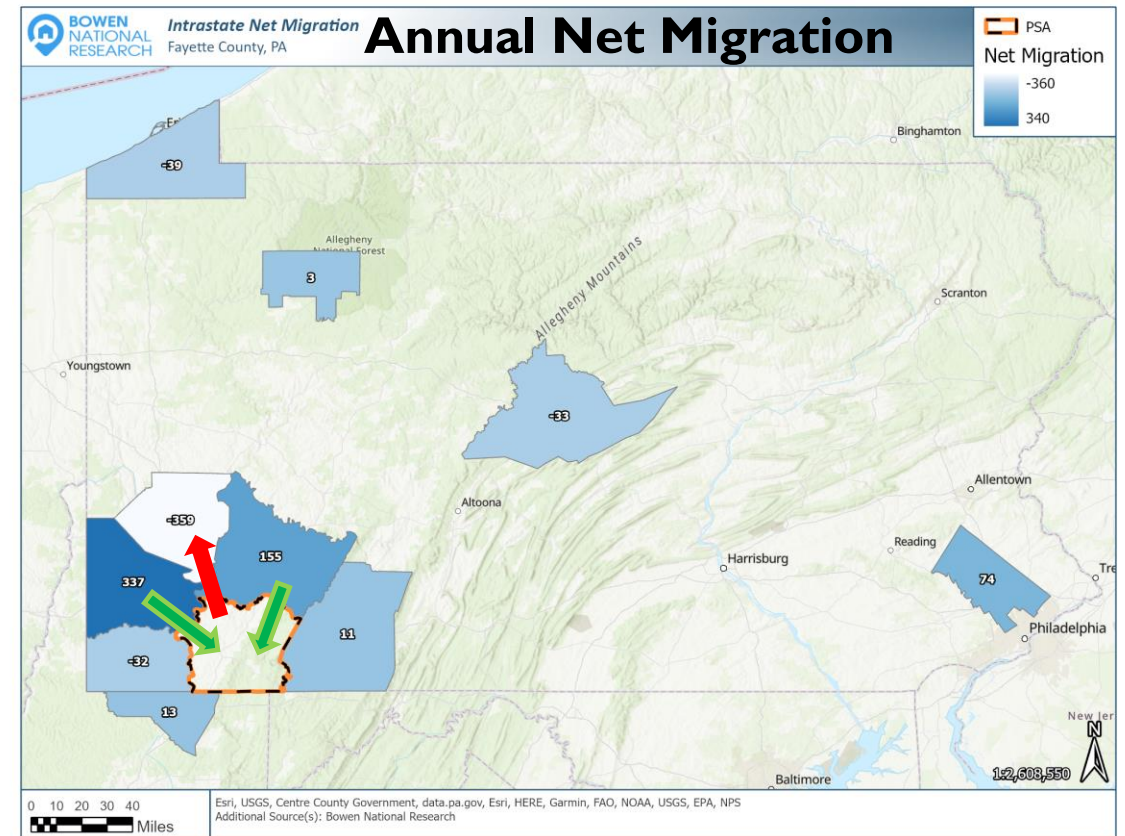
As the projected increase in the number of owner households in the PSA largely favors higher income households, these projections should be considered when evaluating the for-sale housing opportunities in Fayette County.

Demographics – Migration Patterns (County-to-County Mobility)

County-to-County Domestic Population Migration for Fayette County, PA Top 10 Gross Migration Counties			
County	Gross Migration		Net-Migration
	Number	Percent	
Westmoreland County, PA	1,731	19.3%	155
Washington County, PA	1,223	13.6%	337
Allegheny County, PA	1,011	11.3%	-359
Greene County, PA	356	4.0%	-32
Monongalia County, WV	217	2.4%	13
Erie County, PA	199	2.2%	-39
Somerset County, PA	181	2.0%	11
Montgomery County, PA	162	1.8%	74
Forest County, PA	115	1.3%	3
Centre County, PA	85	0.9%	-33
All Other Counties	3,684	41.1%	-248
Total Migration	8,964	100.0%	-118

Source: U.S. Census Bureau, 2020 5-Year American Community Survey; Bowen National Research

*Top 10 list only includes counties within the state and bordering states



Washington County (337), Westmoreland County (155), and Montgomery County (74) have the largest positive net-migration influence on the PSA. Conversely, Allegheny County (-359) has the largest overall negative net migration for the PSA. Allegheny County encompasses the Pittsburgh metropolitan area. It is likely that many Fayette County residents, particularly younger individuals, relocate to this area seeking employment opportunities or the lifestyle that a larger metropolitan area offers.

Demographics – Migration Characteristics (Per-Person Incomes)

Fayette County: Income Distribution by Mobility Status for Population Age 15+ Years*						
2021 Inflation Adjusted Individual Income	Moved Within Same County		Moved From Different County, Same State		Moved From Different State	
	Number	Percent	Number	Percent	Number	Percent
<\$10,000	1,094	23.0%	490	29.8%	112	11.7%
\$10,000 to \$14,999	790	16.6%	130	7.9%	100	10.5%
\$15,000 to \$24,999	854	18.0%	282	17.1%	129	13.5%
\$25,000 to \$34,999	736	15.5%	240	14.6%	121	12.7%
\$35,000 to \$49,999	509	10.7%	225	13.7%	207	21.7%
\$50,000 to \$64,999	316	6.6%	54	3.3%	87	9.1%
\$65,000 to \$74,999	204	4.3%	103	6.3%	2	0.2%
\$75,000+	249	5.2%	122	7.4%	198	20.7%
Total	4,752	100.0%	1,646	100.0%	956	100.0%

Source: U.S. Census Bureau, 2021 5-Year American Community Survey; Bowen National Research

Over three-quarters of the population that moved to Fayette County earned less than \$50,000 per year. This large base of lower income individuals influences the demand for more affordable housing alternatives, which currently has limited availability and notable wait lists. It is worth noting that over 20% of the people that move to the county from out of state earn over \$75,000 annually, contributing to the need for higher-end housing product.

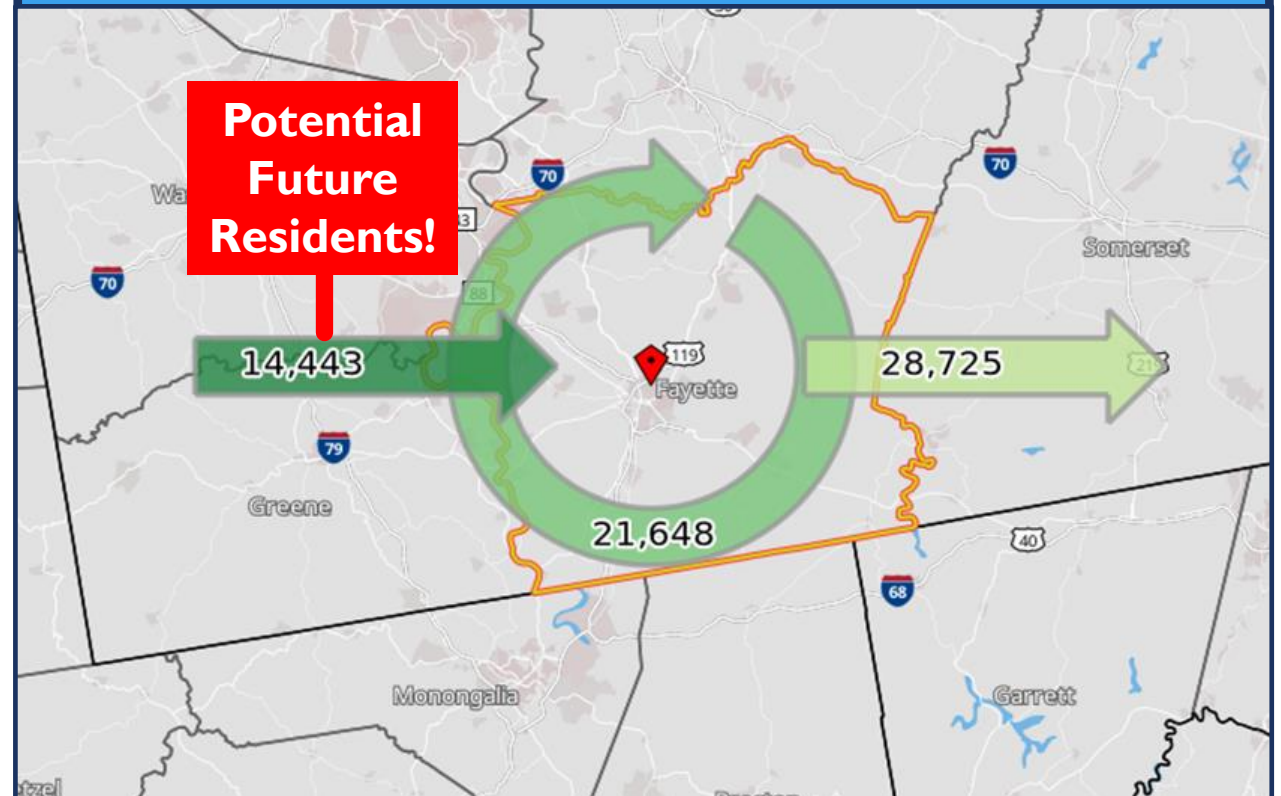
Potential Commuter Support

Over 14,000 individuals from surrounding areas commute into Fayette County for employment, accounting for 40.0% of the people employed in Fayette County.

Commuter Profile:

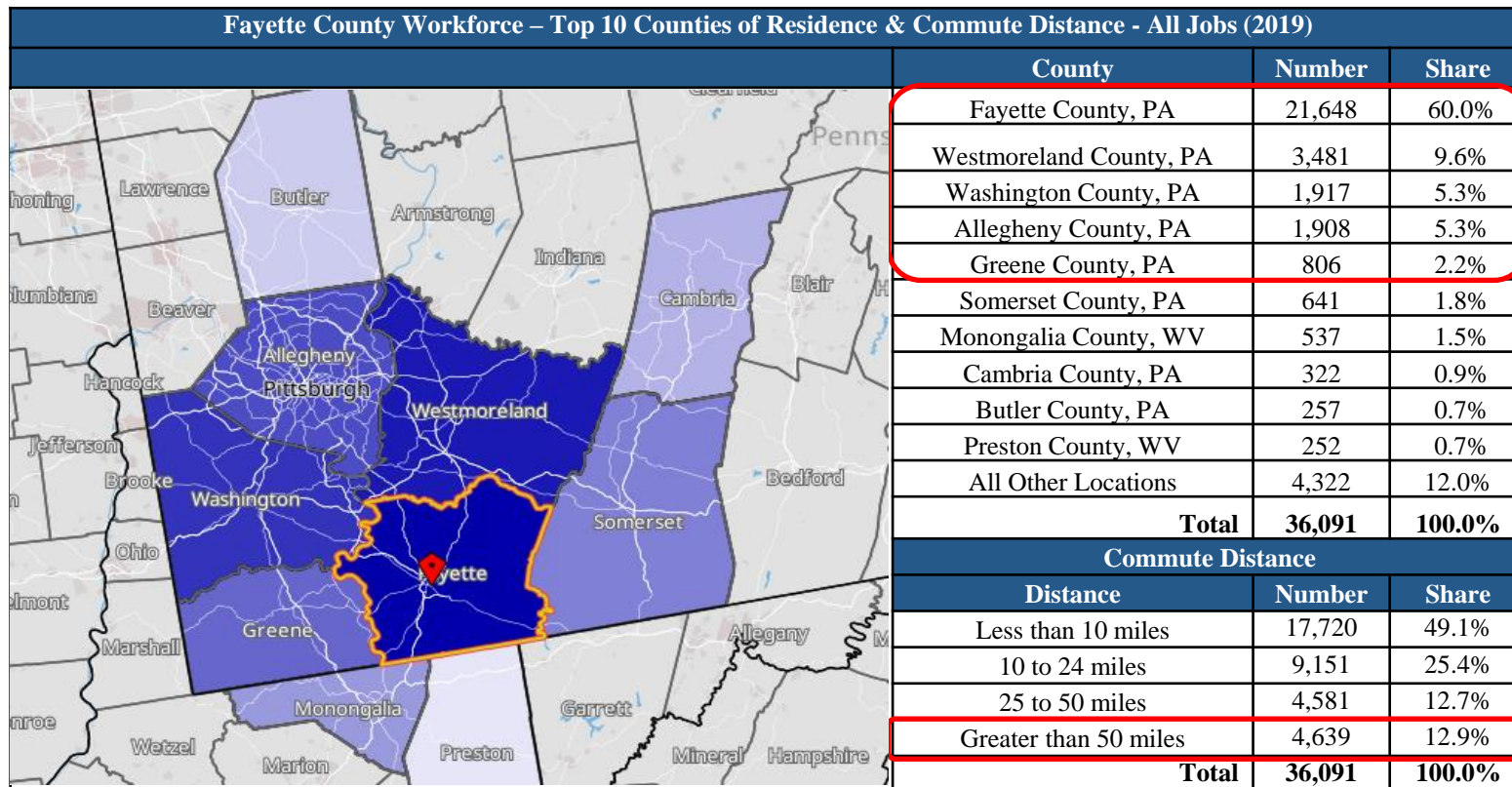
Over half (52.8%) of in-commuters are between ages 30 & 54, and 44.4% earn over \$40,000 annually.

The large number of people that commute daily into the area for work represent a large base of **potential residents for Fayette County.**



Commuter Origination

4,639 people (12.9% of all commuters) who commute into the county for work **drive more than 50 miles** (one way) each day. Many of these long-distance commuters represent the most likely future residents of Fayette County.



More than half (60.0%) of Fayette County workers are residents of Fayette County. Westmorland County (9.6%), Washington County (5.3%), Allegheny County (5.3%), and Greene County (2.2%) contribute the next largest shares of Fayette County employees.

Housing Supply – Multifamily Properties Summary

The demand for multifamily rentals is significant among all program types. Projects with at least some units operating under an affordable housing program have occupancy levels of 98.3% or higher.

Surveyed Multifamily Rental Housing - Fayette County (PSA)				
Project Type	Projects Surveyed	Total Units	Vacant Units	Occupancy Rate
Market-rate	7	312	3	99.0%
Market-rate/Tax Credit	1	36	0	100.0%
Market-rate/Government-Subsidized	1	110	0	100.0%
Tax Credit	6	241	4	98.3%
Tax Credit/Government-Subsidized	5	199	0	100.0%
Government-Subsidized	19	1,520	2	99.9%
Total	39	2,418	9	99.6%

Typically, healthy and well-balanced markets operate at occupancy rates of 94%-96%

Housing Supply – Multifamily Properties Summary (Wait Lists)

37 (86.0%) of the 43 surveyed properties in Fayette County maintain wait lists, with waits up to 24 months (37 households) among Tax Credit rentals and up to 24 months (293 households) for government-subsidized projects.

Project Type	Projects	# Maintain Wait List	% Maintain Wait List	Waiting List (Households/Months)
Fayette County				
Market-Rate	9	7	77.8%	6-100 HH
Tax Credit	9	9	100.0%	3-37 HH / 24 Months
Government-Subsidized	25	21	84.0%	2-293 HH / 1-24 Months

These long wait lists indicate a high level of **pent-up demand**, illustrating a need for additional rental housing across the **entire spectrum of affordability**.

Housing Supply – Market-Rate Multifamily Properties

Within the PSA (Fayette County), **two-bedroom units comprise nearly three-fifths (58.9%)** of the total market-rate supply.

Most collected rents among this product type are **below \$1,000**. This can be primarily attributed to **one market-rate property (118 units)** that **operates as a nonprofit community** and offers very limited amenities and no appliances.

With some rentals achieving rents **above \$1,100** and fully occupied, there are opportunities to **achieve rent premiums** in the market.

Multifamily Rentals by Program Type and Bedroom/Bathroom - Fayette County (PSA)						
Bedroom	Baths	Units	Distribution	Vacancy	% Vacant	Median Collected Rent
Market-Rate						
Studio	1.0	14	3.8%	0	0.0%	\$738
One-Bedroom	1.0	82	22.0%	2	2.4%	\$689
Two-Bedroom	1.0	148	39.8%	1	0.7%	\$450
Two-Bedroom	1.5	65	17.5%	0	0.0%	\$1,085
Two-Bedroom	2.0	6	1.6%	0	0.0%	\$1,235
Three-Bedroom	1.0	49	13.2%	0	0.0%	\$500
Three-Bedroom	2.5	8	2.2%	0	0.0%	\$1,150
Total Market-Rate		372	100.0%	3	0.8%	-

While many of the market-rate rents may be **affordable to lower and moderate-income households**, **limited availability** remains a challenge for households seeking such product.

Housing Supply – Tax Credit Multifamily Properties

Tax Credit rentals generally serve households earning up to **\$80,000** annually.

Only 4 (1.3%) of the **305** Tax Credit units in the county are **vacant**.

Nearly one-half (47.9%) of the surveyed non-subsidized Tax Credit units in the county are one-bedroom units and have a median collected rent of **\$700**. **Majority** of rentals are at or below **\$850**.

Multifamily Rentals by Program Type and Bedroom/Bathroom - Fayette County (PSA)						
Bedroom	Baths	Units	Distribution	Vacancy	% Vacant	Median Collected Rent
Tax Credit (Non-Subsidized)						
One-Bedroom	1.0	146	47.9%	3	2.1%	\$700
Two-Bedroom	1.0	98	32.1%	0	0.0%	\$850
Two-Bedroom	2.0	21	6.9%	1	4.8%	\$691
Three-Bedroom	1.0	3	1.0%	0	0.0%	\$486
Three-Bedroom	1.5	3	1.0%	0	0.0%	\$1,151
Three-Bedroom	2.0	15	4.9%	0	0.0%	\$790
Four-Bedroom	2.0	19	6.2%	0	0.0%	\$915
Total Tax Credit		305	100.0%	4	1.3%	-

With limited available Tax Credit rentals, many low-income households are likely forced to live in substandard or cost-burdened housing situations.

Housing Supply – Government-Subsidized Multifamily Properties

Multifamily Rentals by Program Type and Bedroom/Bathroom - Fayette County (PSA)						
Bedroom	Baths	Units	Distribution	Vacancy	% Vacant	Median Collected Rent
Subsidized Tax Credit						
Studio	1.0	18	10.7%	0	0.0%	-
One-Bedroom	1.0	122	72.6%	0	0.0%	-
Two-Bedroom	1.0	11	6.5%	0	0.0%	-
Three-Bedroom	1.5	14	8.3%	0	0.0%	-
Four-Bedroom	2.0	3	1.8%	0	0.0%	-
Total Tax Credit		168	100.0%	0	0.0%	-
Government-Subsidized						
Studio	1.0	70	4.5%	1	1.4%	-
One-Bedroom	1.0	621	39.5%	1	0.2%	-
Two-Bedroom	1.0	572	36.4%	0	0.0%	-
Three-Bedroom	1.0	189	12.0%	0	0.0%	-
Three-Bedroom	2.0	49	3.1%	0	0.0%	-
Four-Bedroom	1.0	22	1.4%	0	0.0%	-
Four-Bedroom	2.0	46	2.9%	0	0.0%	-
Five-Bedroom	2.0	4	0.3%	0	0.0%	-
Total Tax Credit		1,573	100.0%	2	0.1%	-

Government-subsidized housing generally serves household earning up to \$50,000 annually.

Only 2 of the 1,741 government-subsidized units within the county are vacant.

There are 337 households on the wait list for a Housing Choice Voucher.

Approximately 865 Housing Choice Vouchers currently issued within Fayette County. Approximately 201 of these HCVs are unused due to a variety of reasons.

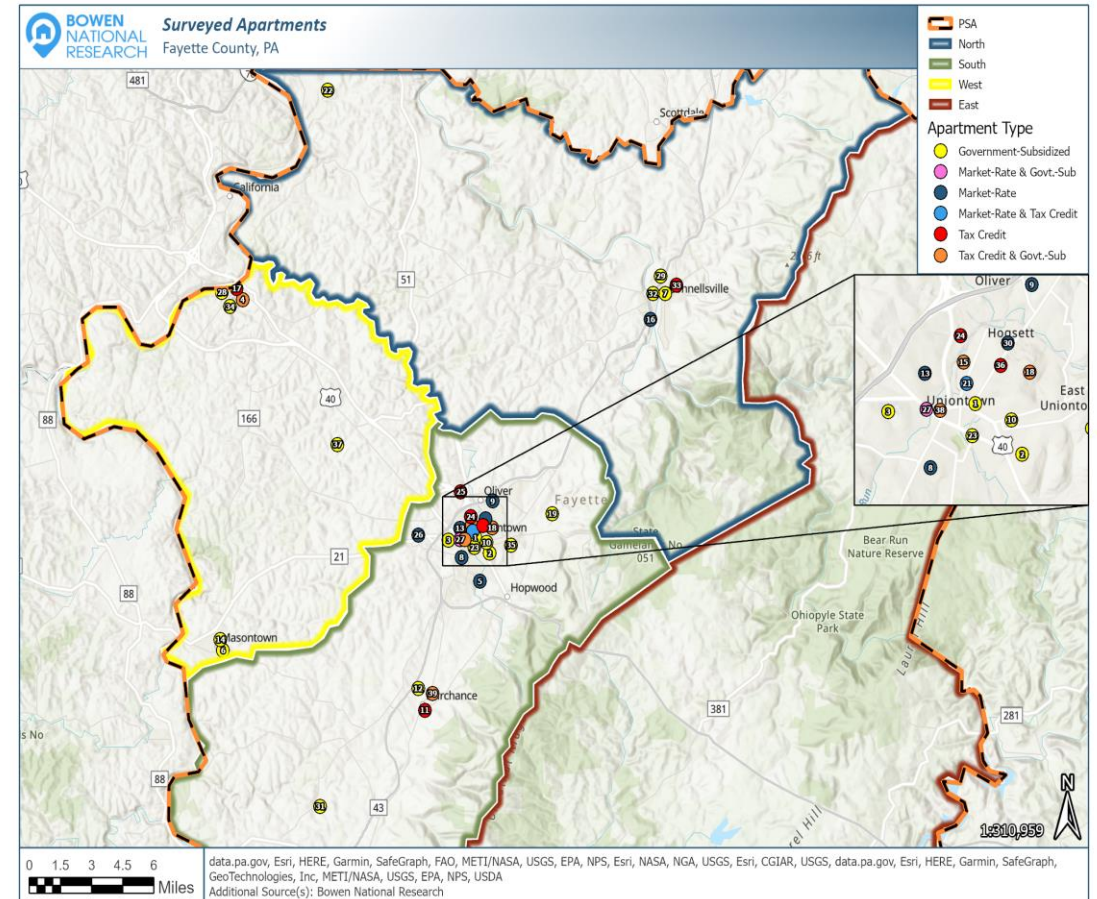
Housing Supply – Multifamily Apartment Data

Occupancy levels are high across all submarkets and all affordability levels.

Overall Market Performance by Program Type by Area












Data Set	East	North	South	West	Fayette County (PSA)
Market-Rate					
Projects	0	1	8	0	9
Total Units	0	118	254	0	372
Vacant Units	-	0	3	-	3
Occupancy Rate	-	100.0%	98.8%	-	99.2%
Tax Credit (Non-Subsidized)					
Projects	0	1	6	2	9
Total Units	0	11	258	36	305
Vacant Units	-	0	0	4	4
Occupancy Rate	-	100.0%	100.0%	88.9%	98.7%
Government-Subsidized					
Projects	0	4	13	8	25
Total Units	0	377	779	585	1,741
Vacant Units	-	0	2	0	2
Occupancy Rate	-	100.0%	99.7%	100.0%	99.9%

Source: Bowen National Research



Housing Supply – Multifamily Apartment Data

- Location
- Quality Ratings
- Year Built/Renovated
- Occupancy Rates
- Wait Lists
- Target Market (Ex. Seniors)
- Property Photos
- Collected Rents
- Unit Mixes
- Targeted Incomes
- Square Footages
- Number of Bedrooms
- Rent Concessions/Specials
- Other Design Elements

<div>1</div> <div>Beeson Court</div> <div>125 E Main St., Uniontown, PA 15401</div> <div>  </div> <div> Total Units: 50 UC: 0 Occupancy: 96.0% Stories: 6 w/Elevator Year Built: 1965 BR: 0, 1 Vacant Units: 2 Waitlist: None AR Year: Target Population: Senior 62+ Rent Special: None Notes: Keeps a WL - 0HH </div>	<div>6</div> <div>Clarence Hess Terrace</div> <div>99 Fort Mason Village, Maistown, PA 15461</div> <div>  </div> <div> Total Units: 50 UC: 0 Occupancy: 100.0% Stories: 1, 2 Year Built: 1977 BR: 1, 2, 3, 4 Vacant Units: 0 Waitlist: None AR Year: Target Population: Family, Senior Rent Special: None Notes: Public Housing </div>	<div>Contact: John</div> <div>Phone: (724) 583-9338</div> <div> Year Built: 1977 AR Year: To Renovated: </div>
<div>2</div> <div>Beeson Square</div> <div>114 Pershing Ct., Uniontown, PA 15401</div> <div>  </div> <div> Total Units: 70 UC: 0 Occupancy: BR: 2, 3 Vacant Units: Target Population: Family Rent Special: None Notes: HUD Section 8 </div>	<div>11</div> <div>Fairchance Senior Housing</div> <div>120 Fair St., Fairchance, PA 15436</div> <div>  </div> <div> Total Units: 36 UC: 0 Occupancy: 100.0% Stories: 3 w/Elevator Year Built: 2020 BR: 1, 2 Vacant Units: 0 Waitlist: 37 HH AR Year: Target Population: Senior 55+ Rent Special: None Notes: Tax Credit; Preleasing info unit; Stabilized occupancy 11/2020 </div>	<div>Contact: Garrett</div> <div>Phone: (724) 628-5650</div> <div> Year Built: 1981 AR Year: To Renovated: </div>
<div>3</div> <div>Bierer Wood Acres</div> <div>1 Pershing Ter., Uniontown, PA 15401</div> <div>  </div> <div> Total Units: 86 UC: 0 Occupancy: BR: 1, 2, 3, 4 Vacant Units: Target Population: Family Rent Special: None Notes: Public Housing </div>	<div>12</div> <div>Fairchance Site</div> <div>Sheldon Ave & Christy Ln., Fairchance, PA 15436</div> <div>  </div> <div> Total Units: 28 UC: 0 Occupancy: 100.0% Stories: 1, 2 Year Built: 1984 BR: 2, 3 Vacant Units: 0 Waitlist: 16 HH AR Year: Target Population: Family Rent Special: None Notes: Public Housing </div>	<div>Contact: Kim</div> <div>Phone: (412) 738-5948</div> <div> Year Built: 1900 AR Year: 2015 To Renovated: </div>
<div>4</div> <div>Brownsville House Apts.</div> <div>310 Calwellader St., Brownsville, PA 15417</div> <div>  </div> <div> Total Units: 34 UC: 0 Occupancy: BR: 1 Vacant Units: Target Population: Senior 62+ Rent Special: None Notes: Tax Credit; RD 515; has RA (30 units) </div>	<div>13</div> <div>Fayette Building</div> <div>52 W. Main St., Uniontown, PA 15401</div> <div>  </div> <div> Total Units: 48 UC: 7 Occupancy: 93.8% Stories: 11 w/Elevator Year Built: 1901 BR: 0, 1, 2 Vacant Units: 3 Waitlist: None AR Year: 2012 Target Population: Family Rent Special: None Notes: 7 units under renovation </div>	<div>Contact: Santiago</div> <div>Phone: (412) 626-6111</div> <div> Year Built: 1987 AR Year: To Renovated: </div>
<div>5</div> <div>Cedarwood Townhouses</div> <div>219 Long Site Dr., Uniontown, PA 15401</div> <div>  </div> <div> Total Units: 65 UC: 0 Occupancy: BR: 2 Vacant Units: Target Population: Family Rent Special: None Notes: </div>	<div>14</div> <div>Fort Mason Village</div> <div>17 Fort Mason Village, Maistown, PA 15461</div> <div>  </div> <div> Total Units: 100 UC: 0 Occupancy: 100.0% Stories: 2 Year Built: 1952 BR: 1, 2, 3, 4 Vacant Units: 0 Waitlist: Yes - WL through HA AR Year: Target Population: Family Rent Special: None Notes: Public Housing </div>	<div>Contact: John</div> <div>Phone: (724) 583-9338</div> <div> Year Built: 1964 AR Year: To Renovated: </div>
	<div>15</div> <div>Gallatin School Living Center</div> <div>155 N. Gallatin Ave., Uniontown, PA 15401</div> <div>  </div> <div> Total Units: 30 UC: 0 Occupancy: 100.0% Stories: 2.5 w/Elevator Year Built: 1910 BR: 0, 1, 2, 3 Vacant Units: 0 Waitlist: 1, 2, & 3-4; 18 HH AR Year: Target Population: Homeless Rent Special: None Notes: Tax Credit (12 units); Tax Credit & PBR/PBRA (18 units); Transition housing for homeless </div>	<div>Contact: Debbie</div> <div>Phone: (724) 439-0201</div> <div> Year Built: 1997 AR Year: To Renovated: </div>

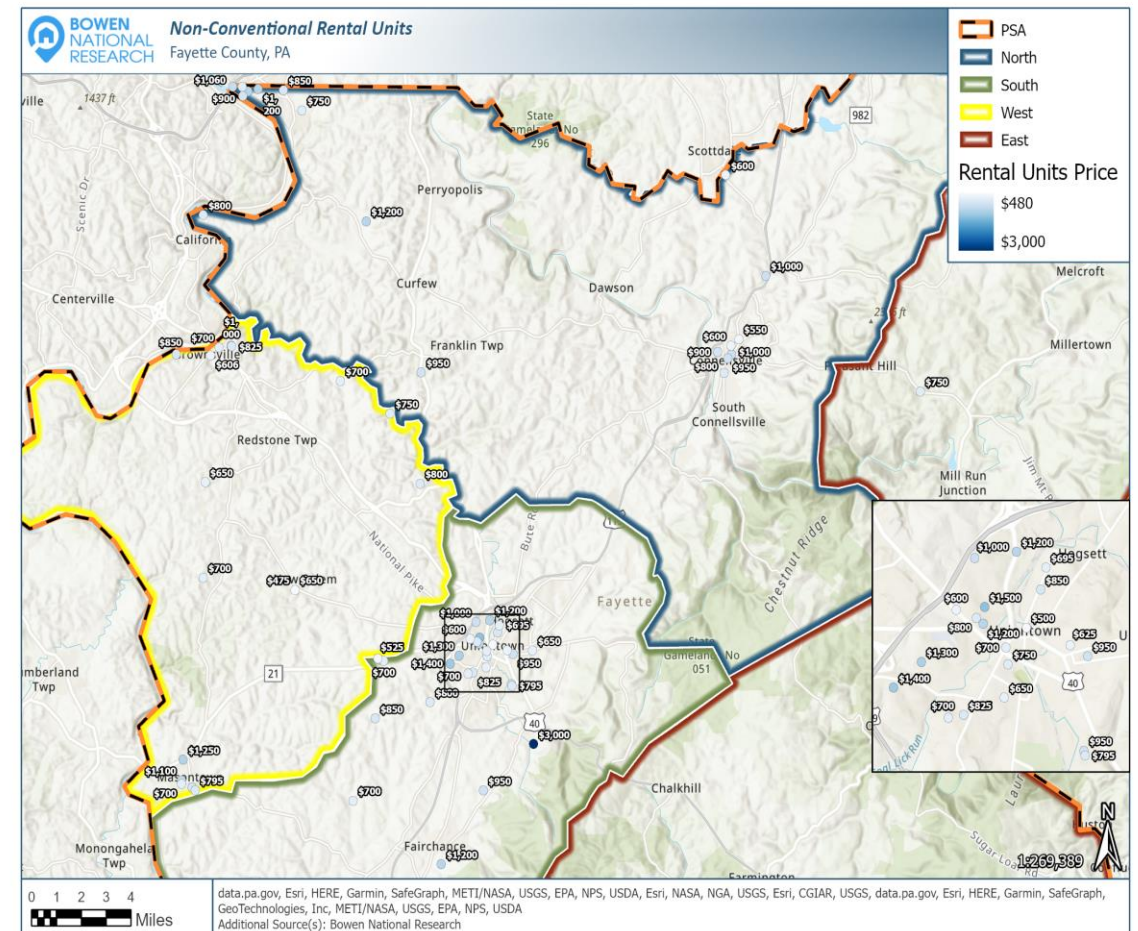
Housing Supply – Non-Conventional Rentals

Non-Conventional Rentals Consist of Single-Family Homes, Duplexes, Mobile Homes, Etc., and Comprise a Large Portion of the Local Housing Market

The approximately 11,417 non-conventional rentals in Fayette County comprise about four-fifths (80.1%) of the county's rental product.

The largest share (30.0%) of Fayette County non-conventional rentals units has rents between \$500 and \$750, followed by units with rents between \$750 and \$1,000 (22.6%).

Higher priced product (gross rents over \$1,000) accounts for 13.6% of all PSA rentals and demonstrates rent premiums are achievable.



Housing Supply – Non-Conventional Rentals

65 non-conventional rental units were identified as **available** to rent in the PSA, resulting in a **99.4% occupancy** rate; Most of the rentals were **built prior to 1950**, are **relatively small** (square feet), and have **collected rents above \$800/month**.

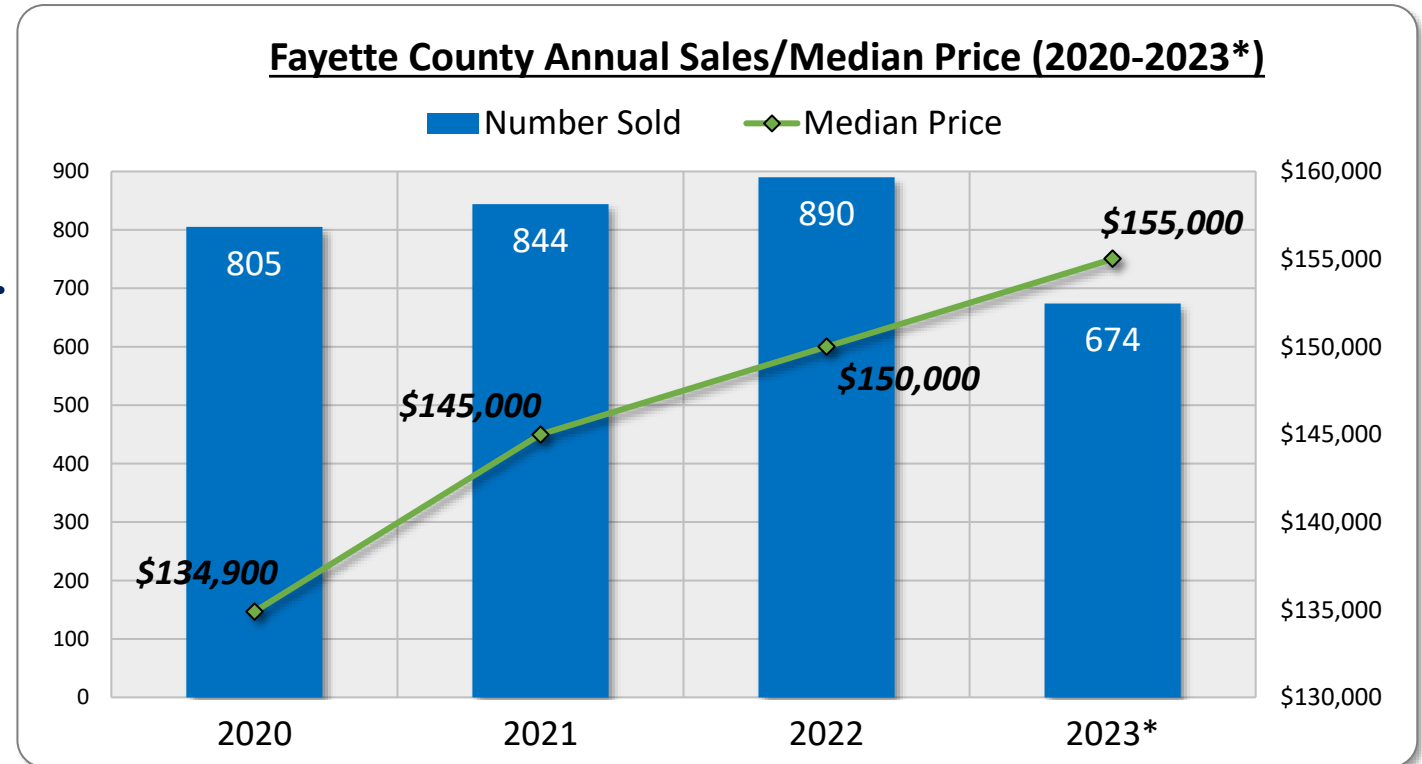
Available Non-Conventional Rentals							
Bedroom Type	Units	Average Number of Baths	Average Year Built	Average Square Feet	Rent Range	Average Rent	Average Rent Per Square Foot
Studio	2	1.0	1908	-	\$500 - \$1,000	\$750.00	-
One-Bedroom	12	1.0	1930	917	\$475 - \$750	\$630.83	\$0.83
Two-Bedroom	27	1.0	1923	956	\$606 - \$1,500	\$812.07	\$0.88
Three-Bedroom	23	1.4	1947	1,254	\$750 - \$1,400	\$1,027.39	\$0.89
Four-Bedroom	1	2.5	1968	2,980	\$3,000 - \$3,000	\$3,000.00	\$1.01

Housing Supply – Historical Home Sales

Annual sales volume has slowed in the PSA over the last year; Median sales price has steadily increased in the PSA since 2020.

The annual **volume of home sales dropped** in 2023, mirroring national trends.

The annual **median sales price increased** in the PSA by **\$20,100** or **14.9%** between 2020 and 2023.



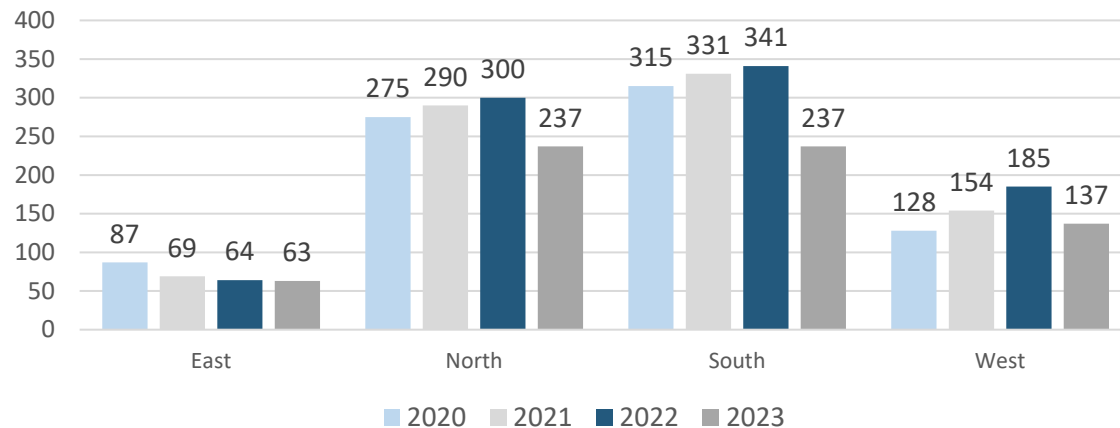
*Sales volume based on projected annual sales

Rising home mortgage interest rates and increasing development costs associated with labor, materials, fees, insurance, land and other expenses are likely influencing home sales (and development) activity.

Housing Supply – Historical Home Sales

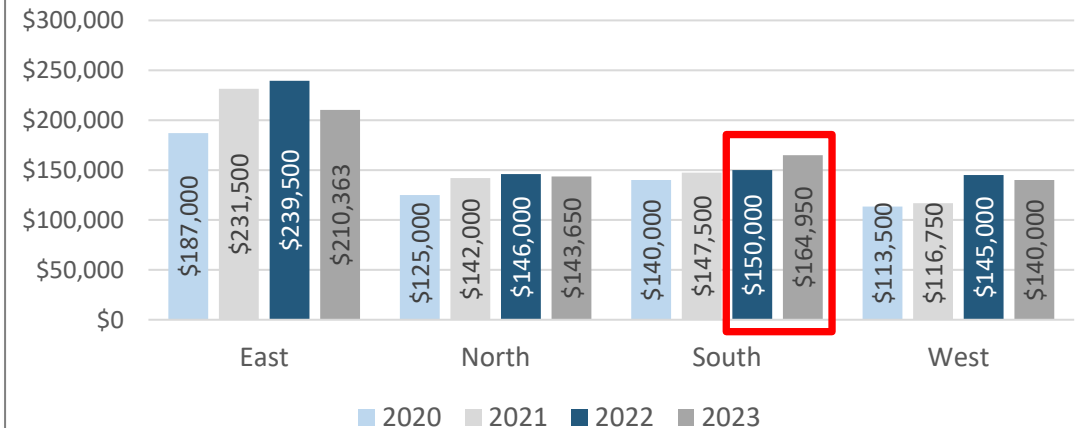
The **South (38.9%)** and **North (34.1%)** submarkets account for the **largest shares of sales volume** in the PSA between 2020 and 2022. **All submarkets experienced sales volume drop** in 2023.

Annual Sales by Submarket (2020-2023*)



*Sales volume based on projected annual sales.

Median Sales Price by Submarket (2020-2023)



Increases of 25.0% or greater in the **median sales price** occurred in the **East (28.1%)** and **West (27.8%)** submarkets between 2020 and 2022, while the **North (16.8%)** and **South (7.1%)** submarkets **experienced more moderate increases** in the median sales price. **All submarkets experienced a decline in median sales price in 2023, except for the South Submarket.**

Housing Supply – Available For-Sale Housing by Price Point

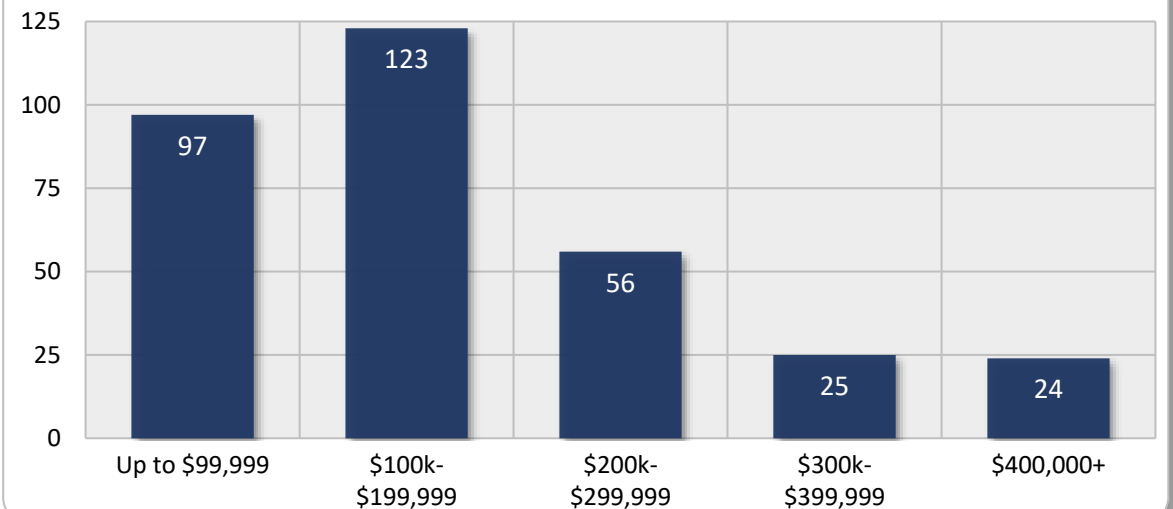
The majority (over two-thirds) of Fayette County's **available** for-sale housing **inventory product** is **priced under \$200k**.

Fayette County's available homes result in an overall **availability rate of 0.8%** (less than healthy rates of 2%-3%)

Fayette County (PSA) Available For-Sale Housing by Price
(As of June 13, 2023)

List Price	Number Available	Percent of Supply
Up to \$99,999	97	29.8%
\$100,000 to \$199,999	123	37.8%
\$200,000 to \$299,999	56	17.2%
\$300,000 to \$399,999	25	7.7%
\$400,000+	24	7.4%
Total	325	100.0%

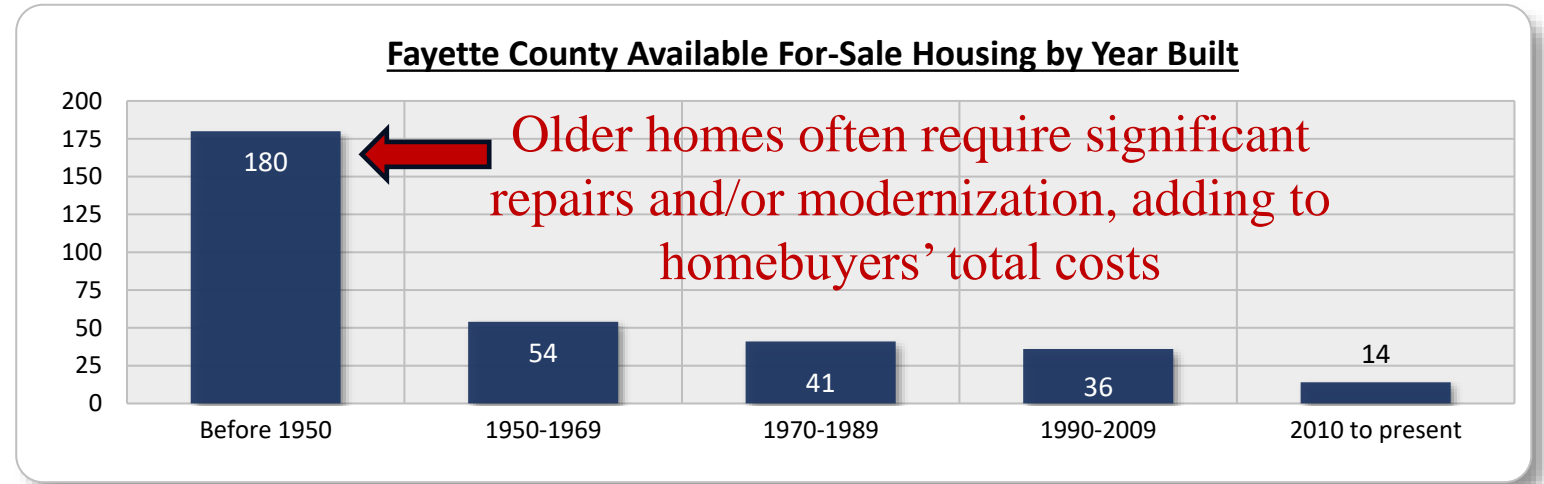
Fayette County Available For-Sale Housing by Price



Housing Supply – Available For-Sale Housing by Year Built

The largest number of **available** for-sale housing **inventory** in the PSA was built before 1950.

Most of the modern product (2010-present) is priced well over \$340,000, making modern product unaffordable to lower and moderate-income households.



Fayette County (PSA) Available For-Sale Housing by Year Built (As of June 13, 2023)				
Year Built	Number Available	Price Range	Median List Price	Average List Price
Before 1950	180	\$10,000 - \$597,000	\$112,450	\$127,545
1950 to 1969	54	\$44,900 - \$400,000	\$197,450	\$199,920
1970 to 1989	41	\$21,000 - \$975,000	\$249,000	\$249,998
1990 to 2009	36	\$79,000 - \$1,690,000	\$246,450	\$335,639
2010 to present	14	\$79,999 - \$610,000	\$374,000	\$343,379
Total	325	\$10,000 - \$1,690,000	\$149,900	\$187,366

Housing Supply – Available For-Sale Housing (Submarket Comparison)

Limited available inventory impacting all submarkets of Fayette County.

Availability rates in each submarket are **1.0% or lower** and **average year built** is **pre-1950**

Greatest volume of available homes is in **South Submarket**, while **highest median list price** is in the **East Submarket**.

Available For-Sale Housing by Submarket (As of June 13, 2023)						
Submarket	Available Homes	Availability Rate	Share of Available Homes	Avg. Year Built	Median List Price	Average List Price
East	37	1.0%	11.4%	1971	\$275,000	\$331,305
North	83	0.6%	25.5%	1938	\$125,000	\$174,850
South	139	1.0%	42.8%	1948	\$155,000	\$178,144
West	66	0.9%	20.3%	1936	\$114,900	\$141,836
Fayette County (PSA)	325	0.8%	100.0%	1946	\$149,900	\$187,366

Housing Conditions – Published Secondary Data

Substandard Housing (Lacking Complete Plumbing/Kitchens or Overcrowded)

About 1,482 Fayette County Households Live in Substandard Housing.

Substandard housing appears to be a more common issue in the **South Submarket** compared to the rest of the county.

	Housing Age and Conditions											
	Pre-1970 Product				Overcrowded				Incomplete Plumbing or Kitchen			
	Renter		Owner		Renter		Owner		Renter		Owner	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
East	537	50.1%	1,483	42.4%	10	0.9%	38	1.1%	0	0.0%	114	3.3%
North	3,161	67.7%	8,821	60.6%	29	0.6%	93	0.6%	118	2.5%	87	0.6%
South	3,479	61.7%	9,273	62.3%	199	3.5%	171	1.1%	199	3.5%	143	1.0%
West	1,920	67.1%	4,978	71.9%	57	2.0%	77	1.1%	49	1.7%	98	1.4%
Fayette County	9,098	63.9%	24,555	61.6%	295	2.1%	379	1.0%	366	2.6%	442	1.1%
Pennsylvania	924,836	58.3%	1,946,870	54.7%	46,892	3.0%	28,336	0.8%	41,649	2.6%	24,990	0.7%

Source: American Community Survey (2017-2021); ESRI

Given some of the substandard housing conditions that exist in the market, it appears that there are likely opportunities to improve housing conditions in Fayette County.

Housing Affordability – Published Secondary Data

More Than 12,000 Fayette County Households Live in Cost-Burdened or Severe Cost-Burdened Housing.

Housing Cost Burdened

5,307 Renter HHs

7,119 Owner HHs

Severe Housing Cost Burdened

2,604 Renter HHs

3,028 Owner HHs

	Household Income, Housing Costs and Affordability							
	2022 Households	Median Household Income	Estimated Median Home Value	Average Gross Rent	Share of Cost Burdened Households*		Share of Severe Cost Burdened Households**	
					Renter	Owner	Renter	Owner
East	4,626	\$60,366	\$173,810	\$808	16.3%	21.2%	11.4%	11.4%
North	18,703	\$58,501	\$139,351	\$682	35.7%	16.4%	15.2%	7.0%
South	20,171	\$49,555	\$143,328	\$731	42.4%	20.7%	20.9%	8.3%
West	9,980	\$48,071	\$117,535	\$787	38.9%	14.5%	21.5%	6.3%
Fayette County	53,480	\$53,579	\$139,992	\$731	37.5%	18.1%	18.4%	7.7%
Pennsylvania	5,232,753	\$70,402	\$232,971	\$1,112	43.5%	19.7%	22.1%	7.8%

Housing Cost Burdened (Paying Over 30% of Income Toward Housing)

Severe Housing Cost Burdened (Paying over 50% of Income Toward Housing)

Typical Wages and Housing Affordability

**2-bedroom FMR @ \$1,090;
Median List Price @ \$149,900**

A majority of the most common occupations in the area have insufficient wages to pay for a typical rental and lack sufficient wages to afford a typical for-sale housing unit.

Wages and Housing Affordability for Top 30 Occupations by Share of Labor Force Pittsburgh Metropolitan Statistical Area (MSA)								
Occupation Sector, Title & Wages*					Housing Affordability**			
Sector Group (Code)	Labor Force Share	Occupation Title	Annual Wages		Max. Monthly Rent		Max. Purchase Price	
			Lower Quartile	Median	Lower Quartile	Median	Lower Quartile	Median
Sales & Related Occupations (41)	2.5%	Retail Salespersons	\$23,080	\$28,790	\$577	\$720	\$76,933	\$95,967
	2.0%	Cashiers	\$22,260	\$23,870	\$557	\$597	\$74,200	\$79,567
	0.8%	Sales Reps, Wholesale/Mfg.	\$50,620	\$70,620	\$1,266	\$1,766	\$168,733	\$235,400
	0.8%	First-Line Supervisors, Retail	\$34,230	\$44,610	\$856	\$1,115	\$114,100	\$148,700
Food Preparation/ Serving (35)	2.6%	Fast Food and Counter Workers	\$20,750	\$23,090	\$519	\$577	\$69,167	\$76,967
	1.5%	Waiters/Waitresses	\$21,350	\$28,820	\$534	\$721	\$71,167	\$96,067
	1.0%	Cooks, Restaurant	\$27,390	\$29,590	\$685	\$740	\$91,300	\$98,633
	0.8%	First-Line Supervisors, Food Prep	\$31,630	\$35,140	\$791	\$879	\$105,433	\$117,133
Office and Administrative Support (43)	2.3%	Customer Services Reps.	\$33,010	\$36,990	\$825	\$925	\$110,033	\$123,300
	2.1%	Office Clerks, General	\$31,610	\$38,210	\$790	\$955	\$105,367	\$127,367
	1.4%	Secretaries/Administrative Assts.	\$33,490	\$39,020	\$837	\$976	\$111,633	\$130,067
	1.2%	First-Line Supervisors, Office	\$47,460	\$59,900	\$1,187	\$1,498	\$158,200	\$199,667
	1.0%	Bookkeeping/Accounting Clerks	\$36,110	\$42,760	\$903	\$1,069	\$120,367	\$142,533
Transportation Material Moving (53)	1.8%	Laborers/Stock/Material Movers	\$31,700	\$36,450	\$793	\$911	\$105,667	\$121,500
	1.6%	Stockers/Order Fillers	\$27,260	\$31,750	\$682	\$794	\$90,867	\$105,833
	1.4%	Heavy/Tractor-Trailer Drivers	\$45,850	\$50,790	\$1,146	\$1,270	\$152,833	\$169,300
	0.7%	Light Truck Drivers	\$28,740	\$38,580	\$719	\$965	\$95,800	\$128,600

Typical Wages and Housing Affordability

**2-bedroom FMR @ \$1,090;
Median List Price @ \$149,900**

**The imbalance
between wages
and housing costs
place financial
burdens on
workers and pose
economic
challenges for
employers.**

Wages and Housing Affordability for Top 30 Occupations by Share of Labor Force Pittsburgh Metropolitan Statistical Area (MSA)								
Occupation Sector, Title & Wages*					Housing Affordability**			
Sector Group (Code)	Labor Force Share	Occupation Title	Annual Wages		Max. Monthly Rent		Max. Purchase Price	
			Lower Quartile	Median	Lower Quartile	Median	Lower Quartile	Median
Sales & Related Occupations (41)	2.5%	Retail Salespersons	\$23,080	\$28,790	\$577	\$720	\$76,933	\$95,967
	2.0%	Cashiers	\$22,260	\$23,870	\$557	\$597	\$74,200	\$79,567
	0.8%	Sales Reps, Wholesale/Mfg.	\$50,620	\$70,620	\$1,266	\$1,766	\$168,733	\$235,400
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	0.7%	Light Truck Drivers	\$28,740	\$38,580	\$719	\$965	\$95,800	\$128,600

COMMUNITY INPUT – STAKEHOLDERS

- **Product Price Needed:** Rentals <\$1,000 & For-Sale between \$150k and \$200k
- **Housing Types Needed:** Ranch style or single floor plan units
- **Resident Housing Issues:** High cost of renovations, lack of down payment, and home purchase affordability
- **Development Barriers:** Labor/Material Costs & Costs of Infrastructure
- **Top Priorities:** The clearing of blighted properties, new construction, the availability of home repair loans, and the quality and safety of rental units

36 Stakeholders Responded

Fayette County, Pennsylvania Summary of Stakeholder Survey Results		
Category	Top Needs / Issues	Consensus
Housing Needs by Price Point	<ul style="list-style-type: none"> For-Sale Housing (\$150,000-\$199,999) Rental Housing (\$500-\$999/Month) Senior Care (Income/Assets <\$25,000) Senior Care (Income/Assets >\$25,000) For-Sale Housing (\$200,000-\$249,999) 	83.6* 77.4* 76.7* 75.0* 66.4*
Housing Needs by Population Served	<ul style="list-style-type: none"> Family Housing (2+ Bedrooms) Senior Living (Independent Living) Senior Living (Assisted Living, Nursing Care) Moderate Workforce (\$30,000-\$60,000) Low-Income Workforce (<\$30,000) 	81.8* 81.5* 77.4* 75.0* 71.1*
Housing Needs by Style	<ul style="list-style-type: none"> Ranch Homes/Single Floor Plan Units Traditional Two-Story Single-Family Homes Duplex/Triplex/Townhomes 	84.8* 72.7* 54.7*
Housing Issues Experienced	<ul style="list-style-type: none"> High Cost of Renovation Lack of Down Payment for Purchase Home Purchase Affordability Limited Availability High Cost of Maintenance/Upkeep 	85.5* 84.4* 82.3* 81.3* 80.6*
Priority by Construction Type	<ul style="list-style-type: none"> Clear Blighted/Unused Structures to Create Land for New Development New Construction Repair/Renovation/Revitalization of Existing Housing 	83.3* 81.3* 77.9*
Priority by Funding Types	<ul style="list-style-type: none"> Home Repair/Loan Homebuyer Assistance Tax Credit Financing 	87.5* 86.4* 70.2*
Common Residential Barriers	<ul style="list-style-type: none"> Cost of Infrastructure Cost of Labor/Materials Development Costs Cost of Land 	70.6% 67.7% 67.7% 61.8%
Reduction of Barriers	<ul style="list-style-type: none"> Tax Credits Collaboration Between Public and Private Sectors Establish Rental Inspection Program Government Assistance with Infrastructure 	47.1% 41.2% 38.2% 35.3%
Top Areas of Focus	<ul style="list-style-type: none"> Developing New Housing Removal/Mitigation of Residential Blight Addressing Crime 	58.8% 52.9% 50.0%
Housing Impact on Residents	<ul style="list-style-type: none"> Prevents Seniors from Living in Housing that Fits Their Needs Causes People to Live in Unsafe Housing or Neighborhoods Causes People to Live in Substandard Housing 	86.4* 78.8* 78.1*
Impacts of Second Home and/or Vacation Rentals	<ul style="list-style-type: none"> Diminishing Inventory Available to Permanent Residents Increasing Home Prices Increasing Rents 	67.7% 54.8% 45.2%
Renter Assistance Priorities	<ul style="list-style-type: none"> Properties That Meet Code/Life Safety Compliance Credit Repair Assistance Rental Housing Inspection Program 	63.6% 45.5% 45.5%
Homeowner Assistance Priorities	<ul style="list-style-type: none"> Home Repair Assistance Homebuyer Downpayment Assistance Credit Repair Assistance Home Weatherization Assistance Property Maintenance Education 	70.6% 64.7% 44.1% 44.1% 44.1%

COMMUNITY INPUT – RESIDENTS/COMMUTERS

- **Housing Issues Experienced:** Cost Burdened, Did Not Have Sufficient Deposit or Down Payment, Had to Move In with Family and/or Friends
- **Product Price Needed:** Rentals <\$500 & For-Sale <\$100k
- **Housing Type Needed:** Family Housing (2+ Bedrooms), Housing for Ages 25 to 40, and Senior Apartments (Independent Living)
- **Issues Negatively Impacting the Local Housing Market:** Housing Not Affordable, Poor Quality of Housing, Undesirable Location/Neighborhood, Not Enough Housing (Limited Availability)
- **Product Design/Type Needed:** Ranch Homes/Single Floor Plan Units, Modern Move-In Ready Single-Family Homes, Duplex/Triplex/Townhomes, Apartments

337 Residents/Commuters Responded!

Fayette County, Pennsylvania Summary of Resident/Commuter Survey Results		
Category	Top Needs / Issues	Consensus
Top Housing Issues Experienced	<ul style="list-style-type: none"> • Cost Burdened (Paying 30% or More of Income Toward Housing Costs) • Did Not Have Sufficient Deposit or Down Payment • Had to Move In with Family and/or Friends 	26.1% 17.4% 13.0%
Housing Market Rating	<ul style="list-style-type: none"> • Poor, Many Issues • Fair, Some Issues • Good, No Issues 	46.5% 27.9% 2.3%
Top Issues Negatively Impacting Housing Market	<ul style="list-style-type: none"> • High Prices or Rents • Neglected/Blighted Properties/Neighborhood (Poor Condition) • Excessive/Rising Utility Costs 	42.6% 41.1% 19.4%
Difficulty Locating Suitable Housing	<ul style="list-style-type: none"> • Yes • Somewhat • No 	42.2% 32.8% 7.0%
Top Reasons for Difficulty Finding Housing	<ul style="list-style-type: none"> • Housing Not Affordable • Poor Quality of Housing • Undesirable Location/Neighborhood • Not Enough Housing (Limited Availability) • Age of Housing (Too Old) • Lack of Housing to Meet Specific Needs (Such as Number of Bedrooms) 	67.0% 54.4% 49.5% 35.9% 27.2% 26.2%
Top Housing Types Needed	<ul style="list-style-type: none"> • Family Housing (2+ Bedrooms) • Housing for Ages 25 to 40 • Rental Housing (Less than \$500/Month) • For-Sale Housing (Less than \$100,000) • Senior Apartments (Independent Living) 	78.2% 73.9% 72.3% 72.2% 66.3%
Top Housing Styles Needed	<ul style="list-style-type: none"> • Ranch Homes/Single Floor Plan Units • Modern Move-In Ready Single-Family Homes • Duplex/Triplex/Townhomes • Apartments 	77.9% 76.9% 62.7% 62.5%
Non-Resident Interest in Relocating to Fayette County	<ul style="list-style-type: none"> • Yes • No 	32.4% 67.6%

COMMUNITY INPUT - EMPLOYERS

- **Housing Issues Employees Face:** Lack of available and quality housing
- **Housing Prices Most Needed:**
 - Entry Level/Workforce For-Sale Housing (Below \$200,000)
 - Affordable Rental Housing (Under \$750/month)
 - Moderate Market-Rate Rental Housing (\$750-\$1,250/month)
- **Housing Having Adverse Impact on Employers:**
Yes: 25.0%, No: 37.5% or Unknown: 37.5%
 - Difficulty Attracting Employees (42.6%)
 - Difficulty Retaining Employees (29.8%)
- **Likelihood Employer Would Hire More Workers if Local Housing Issues Resolved:**
 - More Likely to Hire: 49.0%
- **Programs Most Important to Community:** New Housing Development/Redevelopment, Homebuyer Assistance, and Renter Assistance

48 Employers Responded

Fayette County, Pennsylvania Summary of Employer Survey Results		
Category	Top Needs / Issues	Consensus
Difficulty Attracting/Retaining Employees Due to Housing	<ul style="list-style-type: none">• Yes• No• Unknown	25.0% 37.5% 37.5%
Housing Issues for Employees	<ul style="list-style-type: none">• Lack of Available Housing• Lack of Quality Housing	47.8% 43.5%
Impacts for Employers	<ul style="list-style-type: none">• Difficulty Attracting Employees• Difficulty Retaining Employees	42.6% 29.8%
Effects of Adequate Housing Supply	<ul style="list-style-type: none">• Somewhat/Much More Likely to Hire New Employees• Additional Employees Hired	49.0% Up to 394
Employer Housing Assistance	<ul style="list-style-type: none">• Do Not Currently Provide Housing Assistance to Employees	87.2%
Housing Assistance Program Consideration	<ul style="list-style-type: none">• Housing Relocation Services/Assistance• Housing Counseling/Placement Services• Housing Relocation Reimbursement• Partnering In/Developing Employee Housing	21.3% 14.9% 14.9% 14.9%
Housing Program or Policy Importance	<ul style="list-style-type: none">• New Housing Development/Redevelopment• Homebuyer Assistance• Renter Assistance	58.0* 53.7* 51.1*
Housing Needs by Price	<ul style="list-style-type: none">• Entry Level/Workforce For-Sale Housing (Below \$200,000)• Affordable Rental Housing (Under \$750/month)• Moderate Market-Rate Rental Housing (\$750-\$1,250/month)	82.6% 65.2% 54.4%
Housing Needs by Product Type	<ul style="list-style-type: none">• Single-Family Homes (Owner)• Single-Family Homes (Rental)• Multifamily Apartments• Duplex/Townhome (Rental)	82.2% 53.3% 33.3% 33.3%

Housing Gap Estimates (Rental Housing)

Fayette County has an **Overall Rental Housing Gap** of **Approximately 1,857 Residential Units** at a **Variety of Affordability Levels**.

	Fayette County, Pennsylvania			
	Rental Housing Gap Estimates (2022-2027)			
Percent of Median Income	≤ 50%	51%-80%	81%-120%	121%+
Household Income Range	≤\$50,200	\$50,201-\$80,320	\$80,321-\$123,120	\$123,121+
Monthly Rent Range	≤ \$1,255	\$1,256-\$2,008	\$2,009-\$3,078	\$3,079+
Household Growth	-1,692	355	88	589
Balanced Market*	468	0	59	38
Replacement Housing**	517	59	15	5
External Market Support^	269	61	32	20
Severe Cost Burdened^^	625	313	104	0
Step-Down Support	158	-98	201	-260
Less Pipeline Units	-51	-18	0	0
Overall Units Needed	294	672	499	392

The greatest rental housing gap is for units with rents between \$1,256 and \$2,008 for households generally earning between \$50,201 and \$80,320 annually.

Housing Gap Estimates (For-Sale Housing)

Fayette County has an **Overall For-Sale Housing Gap** of **Approximately 2,622 Residential Units** at a **Variety of Affordability Levels**.

	Fayette County, Pennsylvania			
	For-Sale Housing Gap Estimates (2022-2027)			
Percent of Median Income	≤ 50%	51%-80%	81%-120%	121%+
Household Income Range	≤\$50,200	\$50,201-\$80,320	\$80,321-\$123,120	\$123,121+
Price Point	≤ \$167,333	\$167,334-\$267,733	\$267,734-\$410,400	\$410,401+
Household Growth	-2,148	-584	1,042	1,365
Balanced Market*	282	154	222	180
Replacement Housing**	344	86	50	18
External Market Support^	634	212	123	36
Severe Cost Burdened^^	364	182	60	0
Step-Down Support	350	569	-279	-640
Less Pipeline Units	0	0	0	0
Overall Units Needed	-174	619	1,218	959

The greatest gaps appear to be for housing priced between \$267,734 and \$410,400 (1,218 units) and housing priced at \$410,401 and higher (959 units).

RECOMMENDATIONS

- Identify and designate a “housing champion” to lead efforts and consider capacity building that will expand the base of participants and resources that can be utilized to address housing issues.
- Develop next-steps plans. Local government and stakeholders could begin to prioritize housing objectives and refine housing strategies that best fit the overarching goals of the county.
- Set realistic/attainable short-term housing goals, outline long-term objectives and monitor progress.
- Develop targeted geographic housing plans (community-, submarket- and county-level plans).
- Support existing housing advocacy organizations, programs and initiatives.
- Consider implementing/modifying public policies to encourage or support the development of new residential units and the preservation of existing housing, particularly housing that is affordable to lower income households.
- Support efforts to develop residential units along or near primary transit corridors and/or within walkable communities/downtowns to accommodate the housing needs of seniors and workforce households, and to appeal to younger households.
- Formulate education and outreach campaign to help support housing initiatives.
- Market area’s housing needs & opportunities to potential development partners & consider developing a housing resource center.