



# TOMPKINS COUNTY 2020 HOUSING SNAPSHOT



# INTRODUCTION

In 2017, the Tompkins County Legislature adopted the Tompkins County Housing Strategy, which identified specific targets and approaches to addressing the critical housing issues identified in the 2016 Tompkins County Housing Needs Assessment. Monitoring of housing market conditions and progress towards achieving housing goals are critical components of the Housing Strategy. Released annually, the Tompkins County Housing Snapshot reviews relevant data that provide insight into current housing trends as well as tracks the status of the goals identified in the Housing Needs Assessment and Strategy.

This 2020 Tompkins County Housing Snapshot is divided into two sections: (1) Demographic and Housing Trends and (2) Tracking Housing Targets. The Demographic and Housing Trends section

uses publicly available data from various sources to provide insight into demographic and socioeconomic trends as well as information specific to housing development and the for-sale and rental housing markets.

The second section, Tracking Housing Targets, uses information from the Tompkins County Departments of Assessment, Planning and Sustainability, and Information and Technology Services, local municipalities, and area news sources to track progress on the housing targets identified in the Housing Strategy.



# KEY TAKEAWAYS

## Demographic & Housing Trends

The impact of the COVID-19 pandemic on demographic and housing trends in Tompkins County is not fully measured in this report. Much of the information pre-dates the pandemic or, in some cases, shows the short-term shocks of the pandemic, particularly for employment and home sales data. How the pandemic will shift these trends is yet to be determined.

Further, some of the data, notably the 2020 decennial census data, were likely impacted by the COVID-19 pandemic due to difficulties counting the student population, who may have left the county because of school closures and were not counted appropriately. More information about data and limitations is in Appendix A.

Even with the various limitations and challenges associated with population and housing information, based on the available data, many of the trends seen in previous years persist.

### *Moderate Population Growth*

Tompkins County's population has grown by 4,176 people since 2010. Population growth was concentrated in the urban areas, while the rural parts of the county experienced minimal growth or population decline.

### *An Aging Population*

While Tompkins County has a young population compared to the State of New York, the population is aging. The older adult (65+) demographic increased from 10.8 percent of the population (10,929 adults) in 2010 to 13.9 percent (14,295 adults) in 2019. The under 18 proportion of the population also fell between 2010 and 2019 from 16.4 percent (16,659 people) to 14.9 percent (15,268 people).

### *Household Formation Rate Exceeds Population Growth*

There was an 8.5 percent increase in the number of households in Tompkins County but only a 4.1 percent increase in population between 2010 and 2020. This indicates that households are getting smaller, driving the need for more housing.

### *Moderate Growth in Housing Units*

Tompkins County added 5,210 housing units between 2010 and 2020. The number of vacant housing units rose significantly for the same period, increasing from 2,707 vacant units in 2010 to 4,611 vacant units in 2020.

Nearly all municipalities experienced an increase in the number of housing units, even those that did not experience any population growth.

### *Increasingly Expensive Rental Market*

The median rent for all sizes of units increased over the past decade by at least 18 percent; however, the pace of rent increase for units, excluding studios, slowed in the second half of the decade.

### *Continued Cost Burden for Renters*

Renters in Tompkins County are much more likely to be cost-burdened than homeowners, with an estimated 55 percent of renters considered cost-burdened compared to 18 percent of homeowners.

### *Increasing Home Sales Prices*

The median sales price for a home increased by 10.9 percent between 2019 and 2020 from \$230,000 to \$255,000. The median sales price in Tompkins County is substantially higher than that of surrounding counties. Schuyler County had the second-highest median sales price of \$174,450.

# KEY TAKEAWAYS

## Tracking Housing Targets

Housing Type	Target	Status (2016-2020)
Senior Housing	<ul style="list-style-type: none"> <li>Meet existing deficit of 100 - 200 subsidized senior apartments</li> <li>At least one Medicaid Assisted Living Program facility</li> <li>Market-rate senior housing units with services and congregate care facilities to be determined based on future vacancies and wait lists given recent expansions</li> </ul>	<ul style="list-style-type: none"> <li>59 market-rate and 68 subsidized senior housing units were added.</li> <li>152 market-rate units are proposed/planned for construction in the coming years.</li> </ul>
Supportive Housing / Special Needs Beds	<ul style="list-style-type: none"> <li>100 beds of permanent supportive housing</li> <li>100 Single Room Occupancy (SRO) beds reserved for under 30 percent Area Median Income (AMI)</li> </ul>	<ul style="list-style-type: none"> <li>32 housing units and four SRO beds were constructed.</li> <li>122 units of housing for specific populations (e.g., at-risk homeless) anticipated over the next few years.</li> </ul>
Workforce Units	<ul style="list-style-type: none"> <li>380 new ownership units per year for a total of 3,800 new ownership units through 2025                             <ul style="list-style-type: none"> <li>300 single-family homes per year (90 units between \$150,000 - \$199,999 price range; 210 units at \$200,000+)</li> <li>80 condominiums per year (35 units between \$150,000 - \$199,999 price range; 45 units at \$200,000+)</li> </ul> </li> <li>200 new rental units per year affordable for those earning up to 100 percent of AMI, for a total of 2,000 new rental units through 2025.</li> </ul>	<ul style="list-style-type: none"> <li>58 for-sale units with assessed values between \$150,000 and \$199,999 were built.</li> <li>368 for-sale units with assessed values greater than \$200,000 were built.</li> <li>217 affordable, income-restricted units were built.</li> <li>A total of 473 single-family homes (including manufactured homes) and 1,993 multi-family homes (duplex, triplex, and apartments) were built.</li> </ul>
Student Beds	<ul style="list-style-type: none"> <li>Meet existing deficit of 1,400 to 1,500 on-or off-campus, purpose-built student beds.</li> <li>Add beds to meet any increases in enrollment</li> </ul>	<ul style="list-style-type: none"> <li>Between the 2016-17 and the 2019-20 academic years, enrollment at Cornell University increased by approximately 1,519 students. Ithaca College's enrollment decreased by 412 students while TC3's enrollment declined by 705 students.</li> <li>There was a net increase of 1,479 student-oriented beds between 2016 and 2020.</li> <li>Over 2,500 new student beds are under construction or planned.</li> </ul>

Note: All unit figures in the Status column are best estimates based on available data.

# **DEMOGRAPHIC & HOUSING TRENDS**



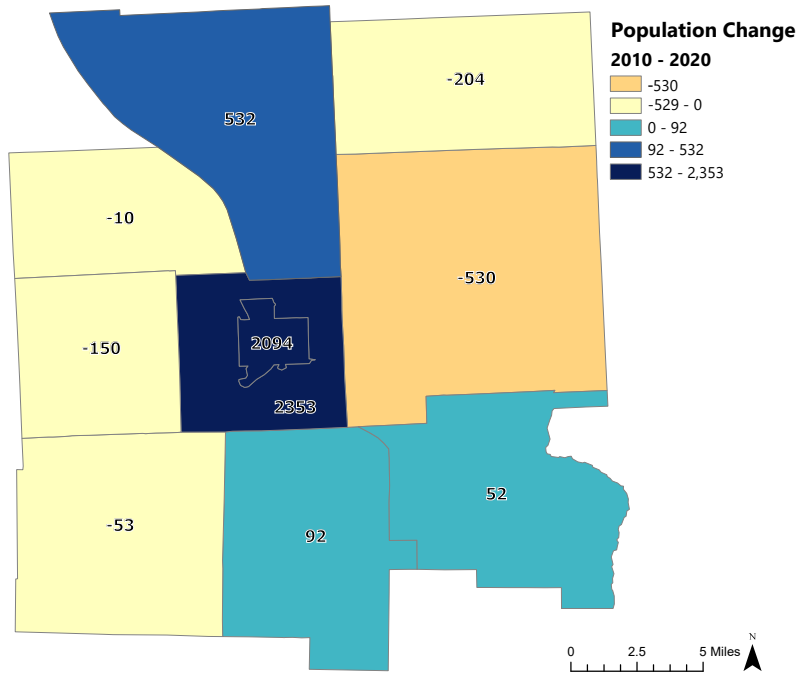
## Population Trends

Current Population: 105,740  
 % Change Since 2010: 4.1%

Since 2010, Tompkins County has added 4,176 people, a 4.1 percent increase in total population. This growth is consistent with that of New York State as a whole, which experienced a 4.2 percent increase in population for the same period. However, Tompkins County is somewhat of an outlier for population growth among surrounding counties, all of which saw their populations decline.<sup>1</sup>

While the county's population has grown, it has not done so to the extent projected in the 2016 Housing Needs Assessment. The Needs Assessment estimated that the county would have a population of 107,410 in 2020, which is approximately 1,700 people above the actual 2020 decennial population.

Figure 1: Tompkins County Population Change by Town and City



<sup>1</sup> U.S. Census Bureau. 2010 Decennial Census, Table P1; U.S. Census Bureau. 2020 Decennial Census Redistricting Data

# DEMOGRAPHICS

Within Tompkins County, population growth varied significantly as shown in Figure 1. The City and Town of Ithaca both added over 2,000 people, while the Town of Dryden experienced the largest loss, with a decrease of 530 residents. The villages also saw significant variation, with Cayuga Heights adding 385 people, while Groton lost 218 people. More detail about population change for Tompkins County local governments is found in Table 1.<sup>1</sup>

Table 1: Population Change by Municipality, 2010-2020

Municipality	2010 Pop.	2020 Pop.	2010-2020 Difference	% Difference
Village of Cayuga Heights	3,729	4,114	385	10.3%
Village of Dryden	1,890	1,887	-3	-0.2%
Village of Freeville	520	498	-22	-4.2%
Village of Groton	2,363	2,145	-218	-9.2%
Village of Lansing	3,529	36,48	119	3.4%
Village of Trumansburg	1,797	1,714	-83	-4.6%
Town of Caroline	3,282	3,334	52	1.6%
Town of Danby	3,329	3,421	92	2.8%
Town of Dryden	14,435	13,905	-530	-3.7%
Town of Enfield	3,512	3,362	-150	-4.3%
Town of Groton	5,950	5,746	-204	-3.4%
Town of Ithaca	19,930	22,283	2353	11.8%
Town of Lansing	11,033	11,565	532	4.8%
Town of Newfield	5,179	5,126	-53	-1.0%
Town of Ulysses	4,900	4,890	-10	-0.2%
City of Ithaca	30,014	32,108	2094	7.0%
<b>Tompkins County</b>	<b>101,564</b>	<b>105,740</b>	<b>4176</b>	<b>4.1%</b>

## Household Trends

The growth of households in the county in the past decade was greater than growth experienced between 2000 and 2010. During the 2000-2010 period, the number of households grew by 7.0 percent or 2,547 households. In contrast 3,306 households have been added to the county since 2010, an 8.5 percent increase.<sup>2</sup>

However, population growth for those periods differed from that trend. The county's population increased by 5,063 people between 2000 and 2010, a 5.2 percent increase, but only by 4,176 people between 2010 and 2020, a 4.1 percent increase. This dip in population growth implies that households have been getting smaller. Moreover, it indicates the ongoing need for more housing units as the household growth rate, a primary driver of housing demand, exceeds population growth.

This would be consistent with trends seen in related ACS data. Between 2010 and 2019, only two-person households grew while larger households, particularly those with four people or more all declined. Table 2 shows changes in various household attributes between 2010 and 2019.<sup>3,4</sup>

**Table 2: Household Attributes**

Household Attribute	2010		2019	
	# of HH	% of HH	# of HH	% of HH
1-person	12,958	33.3	12,731	32.1
2-person	13,347	34.3	15,107	38.1
3-person	5,981	15.3	5,589	14.1
4+ person	6,681	17.1	6,191	15.6
Owner	2.45		2.46	
Renter	2.05		1.99	
All	2.27		2.25	

<sup>2</sup> U.S. Census Bureau. 2000 Decennial Census, Table DP4; 2010 Decennial Census, Table P1; U.S. Census Bureau. 2020 Decennial Census Redistricting Data

<sup>3</sup> U.S. Census Bureau. 2010 Decennial Census, Table H13; U.S. Census Bureau. American Community Survey 2015-2019 5-Year Estimate, Table B25009

<sup>4</sup> U.S. Census Bureau. 2010 Decennial Census, Table H12; U.S. Census Bureau. American Community Survey 2015-2019 5-Year Estimate, Table B25010

<sup>5</sup> U.S. Census Bureau. 2010 Decennial Census, Table P12; U.S. Census Bureau. American Community Survey 2015-2019 5-Year Estimate, Table S0101

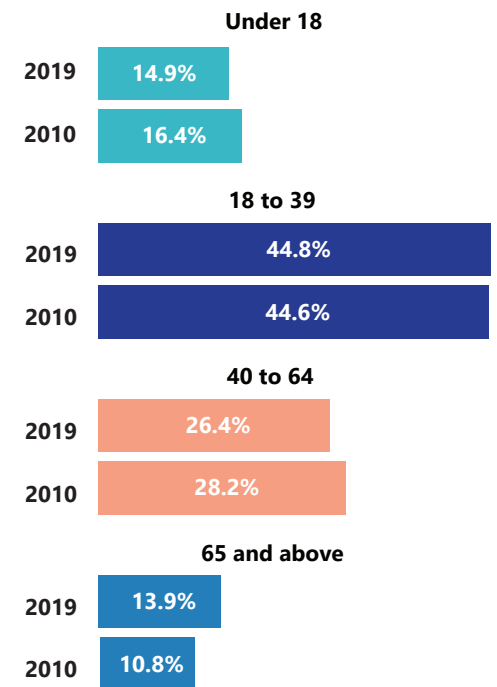
## Age

The median age of Tompkins County residents is 31.1, considerably lower than New York State's median age of 38.8. However, the county's median age has risen slightly since 2010, when it was 29.8. The largest age cohort is the 18 to 39 age group, which comprises 44.8 percent of the county's population, followed by the 40 to 64 age group, which comprises 26.4 percent of the population as shown in Figure 2.

While Tompkins County still has a relatively young population, primarily due to the higher education institutions located here, evidence suggests the non-student population is aging. The number of older adults (65+) increased from an estimated 10,929 adults in 2010 to 14,295 adults in 2019. Older adults now account for nearly 14 percent of the county's population, compared to 10.8 percent in 2010.

Additionally, the under 18 population has fallen in this time period. In 2019, there were 15,268 residents under 18 compared to 16,659 in 2010. In 2010, this group made up 16.4 percent of the population compared to 14.9 percent in 2019.<sup>5</sup>

**Figure 2: Age Cohorts in Tompkins County**



# EMPLOYMENT & COMMUTING

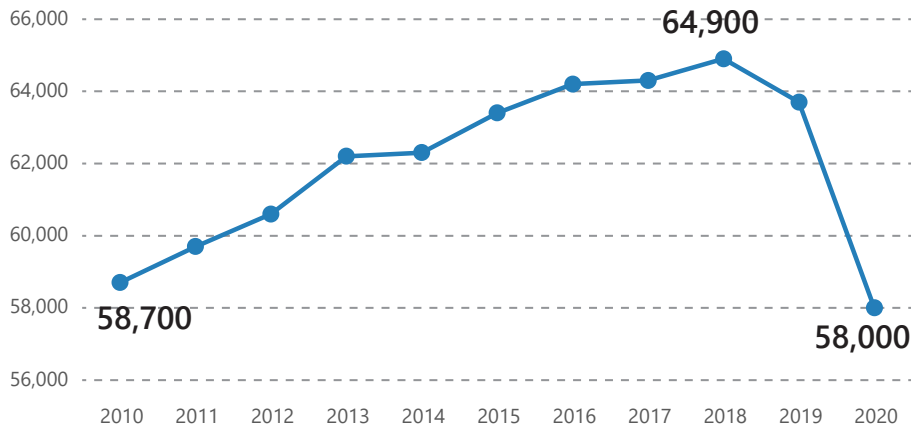
## Employment

Between 2010 and 2019, Tompkins County experienced an 8.5 percent increase in non-farm jobs, with the most rapid job growth occurring in the earlier part of the decade. The rate of job growth slowed in the latter part of the decade, with the number of jobs declining by 1,200 between 2018 and 2019. Significant job loss, approximately 5,700 jobs, then occurred in 2020, much of it likely caused by the pandemic, shown in Figure 3.

Before the pandemic, the (1) Education and Health Services and (2) Leisure and Hospitality sectors accounted for much of the job growth, with employment increasing in those sectors by 4,500 people and 1,000 people, respectively. The (1) Manufacturing, (2) Trade, Transportation, and Utilities, and (3) Retail sectors all experienced job losses of between 200 and 300 jobs between 2010 and 2019.

In 2020, nearly all sectors experienced job loss with the Leisure and Hospitality sector the hardest hit, shedding roughly 25 percent of its workforce.<sup>6</sup>

Figure 3: Change in Total Annual Average Employment, 2010-2020



<sup>6</sup> New York Department of Labor. Current Employment Statistics Survey. Current and Historical Employment Estimates.

<sup>7</sup> U.S. Census Bureau. American Community Survey 2006-2010 and 2015-2019 5-Year Estimates. Tables B08604, B08601, and B08007

<sup>8</sup> U.S. Census Bureau. 2000 Census County-to-County Commuting Flows

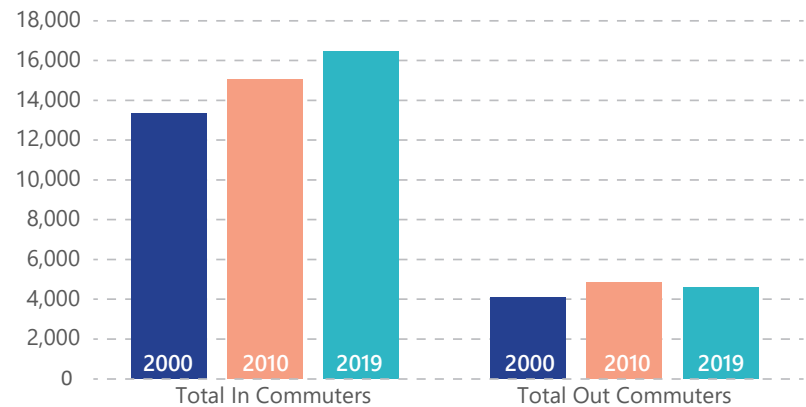
## Commuting Patterns

Since 2010, Tompkins County has experienced an increase in people commuting into the county for work and a slight decrease in those commuting outside the county for work.

- The number of people working in Tompkins County grew from 59,599 in 2010 to 60,984 in 2019, an increase of 1,385 workers.
- Of these 60,984 workers, 73 percent or 44,527 people both live and work in the county. That figure is similar to the 2010 estimate when 44,576 people lived and worked in the county.
- Twenty-seven percent of the Tompkins County workforce or 16,457 workers commute into the county for work. The number of in-commuters has increased 9.5 percent since 2010, when 15,023 workers commuted into the county.<sup>7</sup>

The data described above partially continue the trend from 2000-2010 when the county experienced an increase of in-commuters. Figure 4 shows the commuting trends of over the past 20 years.<sup>8</sup>

Figure 4: Change in Commuting Patterns, 2000-2019





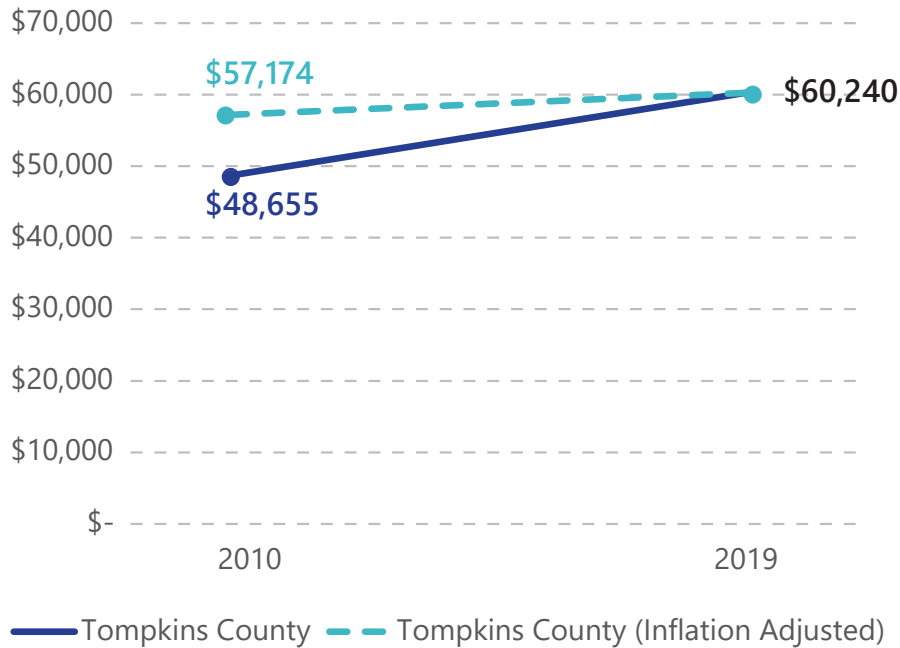
# Income

As a whole, the Tompkins County median household income (all figures adjusted for inflation) has risen since 2010 from \$57,174 to \$60,240, a 5.4 percent increase, as shown in Figure 5. While both family and non-family\* median household incomes rose during this period, only families saw significant gains. Family median incomes increased from \$84,878 to \$86,232, while non-family median income increased from \$35,122 to \$35,390. For the same period, per capita income also rose from \$30,243 to \$33,075.

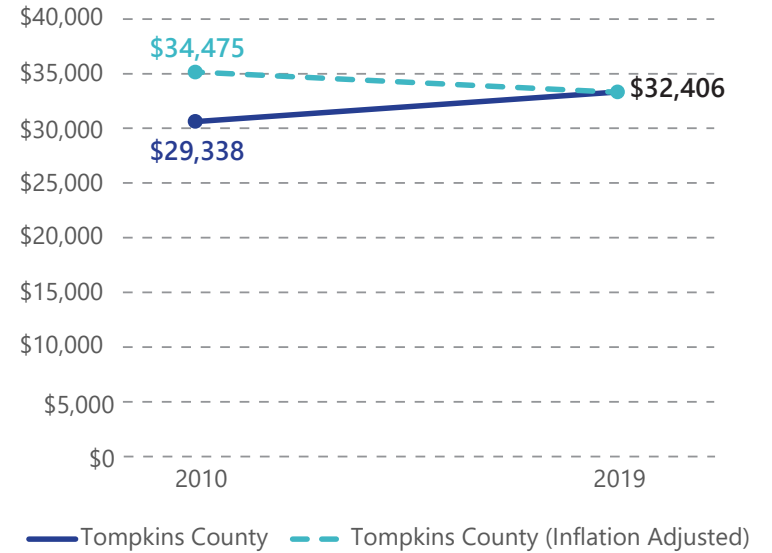
Yet, those gains were not felt equally when analyzing the data by housing tenure (renter v. owner). Since 2010, renter median household incomes (students and non-students) have declined by 6 percent when adjusted for inflation, as shown in Figure 6. Owner-occupied households, however, have seen their incomes increase by 2.7 percent when adjusted for inflation, as shown in Figure 7.<sup>11</sup>

# INCOME

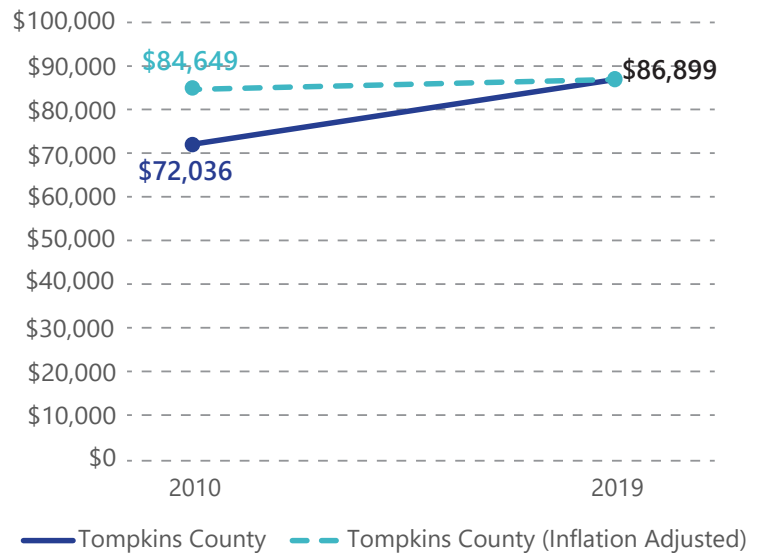
**Figure 5: Change in Median Household Income for All Households**



**Figure 6: Change in Median Household Income for Renters**



**Figure 7: Change in Median Household Income for Owners**



\* A non-family household consists of a one-person household or when a household consists of unrelated people.  
<sup>11</sup> U.S. Census Bureau. American Community Survey 2006-2010 and 2015-2019 5-Year Estimates. Tables S2503, S1901, B19301

## Short Term Migration Trends

A common narrative from the pandemic has been that migration patterns shifted with people moving from high-cost urban areas to smaller cities or more affordable metropolitan regions. To evaluate this narrative, CBRE, a real estate firm, analyzed USPS change of address requests. This analysis revealed some shifts for Tompkins County between 2019 and 2020, with the county experiencing an increase in the number of households moving to the county in 2020 as shown in Table 3. However, it is hard to determine if the 2020 data represent a departure from the norm given the limited comparative data.<sup>9</sup>

In 2020, Tompkins County welcomed 2,307 total households to the community, an increase of 118 households from 2019. The majority of those that moved in these two years to the county are from within New York State as shown in Table 4.

For the same period, a total of 69 fewer households moved out of the county. However, for both years, move-outs exceeded move-ins to the county as shown in Table 3.

However, this type of data often does not include students or international populations, who usually do not file change of address forms.<sup>10</sup>

**Table 3: Moves into and out of Tompkins County\***

	Move Outs	Move Ins	Difference
<b>2019</b>	2,935	2,189	-746
<b>2020</b>	2,866	2,307	-559
<b>Difference</b>	-69	118	

\*Excludes households that moved within the county

<sup>9</sup> CBRE. COVID-19 Impact on Resident Migration Patterns. April 2021. <https://www.cbre.us/research-and-reports/COVID-19-Impact-on-Resident-Migration-Patterns>

<sup>10</sup> Kolko, Jed, Emily Badger, and Quoc Trung Bui. "How the Pandemic Did, and Didn't, Change Where Americans Move." New York Times. 19 April 2021. <https://www.nytimes.com/interactive/2021/04/19/upshot/how-the-pandemic-did-and-didnt-change-moves.html>

# SHORT TERM MIGRATION

**Table 4: Where Tompkins County Households are Moving From, Top MSAs**

Location (MSA)	2019	% of 2019 Moves	2020	% of 2020 Moves
Albany - Schenectady - Troy, NY	23	1.1	31	1.3
Binghamton, NY	296	13.5	228	9.9
Boston-Cambridge-Newton, MA	91	4.4	111	4.8
Buffalo - Cheektowaga, NY	46	2.1	26	1.1
Elmira, NY	121	5.5	81	3.5
Los Angeles - Long Beach - Anaheim, CA	51	2.3	77	3.3
Miami - Ft. Lauderdale - Pompano Beach, FL	35	1.6	34	1.5
New York City - Newark - Jersey City, NY/NJ	322	14.7	495	21.5
Philadelphia - Camden - Wilmington PA/NJ/DE	27	1.2	59	2.6
Rochester, NY	131	6.0	105	4.6
San Diego - Chula Vista - Carlsbad, CA	22	1.0	25	1.1
San Francisco - Oakland - Berkeley, CA	50	2.3	49	2.1
San Jose - Sunnyvale - Santa Clara, CA	50	2.3	49	2.1
Seattle -Tacoma - Bellevue, WA	23	1.1	27	1.2
Syracuse, NY	135	6.2	138	6.0
Tampa - St. Petersburg - Clearwater, FL	11	0.5	34	1.5
Washington DC - Arlington - Alexandria, DC/VA	46	2.1	53	2.3
Other	689	31.5	671	29.1
<b>Total</b>	<b>2,189</b>		<b>2,307</b>	

## Housing Units

*Current Housing Units: 46,844*

*% Change Since 2010: 7.8%*

The following data from the 2020 Census presents some contradictions. Some of the following figures may have been influenced by conducting a census during the COVID-19 pandemic, particularly given the county's sizable student population. Additional notes about Census data are in Appendix A. As a detailed review of census information occurs in the coming months, some of contradictions shown in these housing and population figures may become clearer or may require revision with the U.S. Census Bureau.

The total number of housing units in Tompkins County has grown from 41,674 units in 2010 to 46,844 units in 2020, an increase of 5,210 units. Based on that figure, the county has added more housing units than people.

However, this increase has been accompanied by a substantial increase in vacant housing units. Between 2010 and 2020, the number of vacant units increased by 70.3 percent, rising from 2,707 units to 4,611 units. Given this increase in vacant units, the occupancy rate fell during the past decade. In 2010, 93.5 percent all housing units were occupied, while in 2020, 90.1 percent were occupied.

Housing unit data are available for each local government in Tompkins County in Table 5.

While many localities lost population between 2010 and 2020, housing development did not reflect that trend. Every municipality except Freeville experienced an increase in housing units. However, the housing unit data, particularly when analyzed with the population, present some contradictory information. The following are highlights from housing and population data:

- The Village of Cayuga Heights added 385 people but only 15 housing units.
- The City of Ithaca added 2,094 people and 3,061 housing units, while the Town of Ithaca added 2,353 people and 759 housing units.
- The Towns of Dryden, Enfield, Groton, Newfield, and Ulysses all lost population but gained housing units, with the Town of Dryden losing the most people (530) but adding 116 housing units.
- Each municipality, except the Village of Dryden, experienced an increase in the number of vacant units.<sup>13</sup>

<sup>13</sup>U.S. Census Bureau. 2010 Decennial Census, Table H1 and H3; U.S. Census Bureau. 2020 Decennial Census Redistricting Data



Table 5: Change in Housing Units by Municipality, 2010-2020

Municipality	Total Housing Units			Occupied Housing Units			Vacant Housing Units		
	2010	2020	2010-2020 Dif.	2010	2020	2010-2020 Dif.	2010	2020	2010-2020 Dif.
Village of Cayuga Heights	1,663	1,678	15	1,541	1,470	-71	122	208	86
Village of Dryden	867	1,002	135	812	952	140	55	50	-5
Village of Freeville	224	223	-1	212	209	-3	12	14	2
Village of Groton	1,015	1,066	51	965	1,007	42	50	59	9
Village of Lansing	1,788	2,024	236	1,687	1,776	89	101	248	147
Village of Trumansburg	883	903	20	816	834	18	67	69	2
Town of Caroline	1,495	1,665	170	1,403	1,516	113	92	149	57
Town of Danby	1,480	1,576	96	1,373	1,413	40	107	163	56
Town of Dryden	6,418	6,534	116	6,016	5,990	-26	402	544	142
Town of Enfield	1,567	1,623	56	1,445	1,460	15	122	163	41
Town of Groton	2,448	2,561	113	2,322	2,394	72	126	167	41
Town of Ithaca	7,526	8,285	759	6,988	7,480	492	538	805	267
Town of Lansing	5,130	5,765	635	4,751	5,182	431	379	583	204
Town of Newfield	2,277	2,386	109	2,123	2,226	103	154	160	6
Town of Ulysses	2,383	2,478	95	2,138	2,172	34	245	306	61
City of Ithaca	10,950	14,011	3,061	10,408	12,440	2,032	542	1,571	1,029
<b>Tompkins County</b>	<b>41,674</b>	<b>46,884</b>	<b>5,210</b>	<b>38,967</b>	<b>42,273</b>	<b>3,306</b>	<b>2,707</b>	<b>4,611</b>	<b>1,904</b>

## Vacancy Rates

While the 2020 Census data shows that there was an increase in the number of vacant units between 2010 and 2020, the pre-pandemic ACS data does not show that trend. Instead, the ACS data illustrates that vacancy rates in Tompkins County remain very low.

In 2019, Tompkins County had a rental vacancy rate of 4.0 percent, which is slightly lower than the 2010 vacancy rate of 4.4 percent. However, this rate has fluctuated over the decade, reaching a low of 1.9 percent in 2014. Tompkins County had a rental vacancy rate a couple of points lower than the national rental vacancy rate, which was 6.0 in 2019. A healthy rental vacancy rate is between 5-8 percent, but it depends on the dynamics of the local market such as the stability of the economy and economic drivers.

Homeowner vacancy rates are typically lower than rental vacancy rates because homeowners tend to move less often than renters. In Tompkins County, the homeowner vacancy rate has remained consistently low over the past decade. In 2010, the homeowner vacancy rate was 1.3, and in 2019, the rate was 1.9. Nationwide homeowner vacancy rates have more substantially changed in the past decade declining from 2.5 in 2010 to 1.6 in 2019.<sup>12</sup>

The low vacancy rates for Tompkins suggest a housing shortage for both renters and homeowners. Low vacancy will likely keep housing costs high until more units are added to the market. The combination of underproduction of housing pre-pandemic and the ongoing challenges posed by supply chain and labor market disruptions suggest that these low vacancy rates may persist until more housing units are built. It should be noted that vacancy rates only count units that are currently available for rent or ownership. Vacancy rates exclude units that are seasonal or vacant for other reasons such as being in need of repairs or held off the market for personal reasons.

Accurate vacancy rate data, particularly for rentals, is difficult to obtain in a small market like Tompkins County because of limited sources. This makes tracking short-term vacancy trends difficult.

<sup>12</sup> U.S. Census Bureau. 2010 Decennial Census, Tables H3 and H5; U.S. Census Bureau. American Community Survey 2015-2019 5-Year Estimates. Tables B25002 and B25004

## Population by Housing Tenure

There are three types of documented living situations for Tompkins County residents in the census and ACS: owner-occupied units, renter-occupied units, and group quarters (e.g., dormitories, nursing homes, correctional facilities, group homes, emergency and transitional shelters).

In 2020, 13.7 percent of the population (14,467 people) lived in group quarters, an increase of 1,235 people since 2010. This would indicate that as of 2020, the county's remaining 91,723 residents lived in occupied homes, an increase of 2,941 people since 2010.

As noted in the previous section, Tompkins County has added more total housing units (5,210) than people (4,176) over the past decade. However, only 3,306 occupied housing units have been added to the county's housing stock. When excluding the group quarters population, the county has only added 2,941 people, which is fewer than the number of occupied housing units added.<sup>14</sup>

## Housing Tenure

According to 2019 ACS data, approximately 54.9 percent of Tompkins County's housing units are owner-occupied. This figure has trended slightly upward since 2010, when 54.1 percent of housing units were owner-occupied. Meanwhile, the proportion of renter-occupied units fell from 45.9 percent of housing units in 2010 to 45.1 percent in 2019. Table 6 shows the breakdown of owner and renter units for local governments in the county.<sup>15</sup>

*Table 6: Renter and Homeowner Households by Municipality, 2019*

Municipality	% of renter households	% of homeowner households
Village of Cayuga Heights	47.8	52.2
Village of Dryden	45.0	55.0
Village of Freeville	23.7	76.3
Village of Groton	31.3	68.7
Village of Lansing	67.6	32.4
Village of Trumansburg	34.5	65.5
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Town of Caroline	42.3	57.7
Town of Danby	20.9	79.1
Town of Dryden	31.9	68.1
Town of Enfield	23.7	76.3
Town of Groton	20.3	79.7
Town of Ithaca	47.3	52.7
Town of Lansing	41.4	58.7
Town of Newfield	25.0	75.0
Town of Ulysses	20.1	79.9
City of Ithaca	74.2	25.8
<b>Tompkins County</b>	<b>45.1</b>	<b>54.9</b>

<sup>14</sup> U.S. Census Bureau. 2010 Decennial Census, Tables P1, H1, P42 and H11; U.S. Census Bureau. 2020 Decennial Census Redistricting Data

<sup>15</sup> U.S. Census Bureau, 2010 Decennial Census, Table HCT4; U.S. Census Bureau. American Community Survey 2015-2019 5-Year Estimates. Tables S2502



## Housing Affordability

Despite the growth in housing units, data indicate that affordability remains a serious issue for both renters and homeowners throughout Tompkins County. For housing to be affordable, a household should generally spend no more than 30 percent of its income on housing costs, which includes rent or mortgage and some utilities. A household that meets or exceeds the 30 percent threshold is considered cost-burdened. A household that spends 50 percent or more of its income on housing is considered severely cost-burdened.

### Renter Affordability

Renter households in the county are more likely to be cost-burdened than not. The percentage of cost-burdened and severely cost-burdened households has increased since 2010 as shown in Figure 8.

Renter affordability is not a challenge unique to the urban areas of the county - at least 30 percent of renters in most of the municipalities are considered cost-burdened, as shown in Table 7.<sup>16</sup>

### Homeowner Affordability

Owner-occupied households, particularly those with mortgages, also face affordability challenges. Approximately 18 percent of owner-occupied households in Tompkins County are cost-burdened, and 7.2 percent are severely cost-burdened. However, unlike renters, the percentage of owner-occupied households, including those with mortgages and without mortgages, that face cost burdens has stayed the same or declined since 2010 as shown in Figure 9. Table 7 shows these figures by municipality.<sup>17</sup>

# AFFORDABILITY

Figure 8: Renter Household Cost Burden, 2010-2019

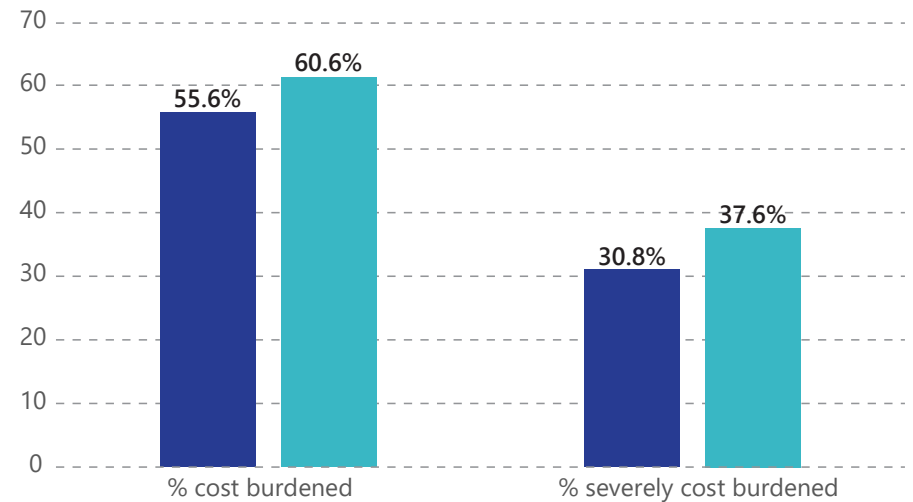
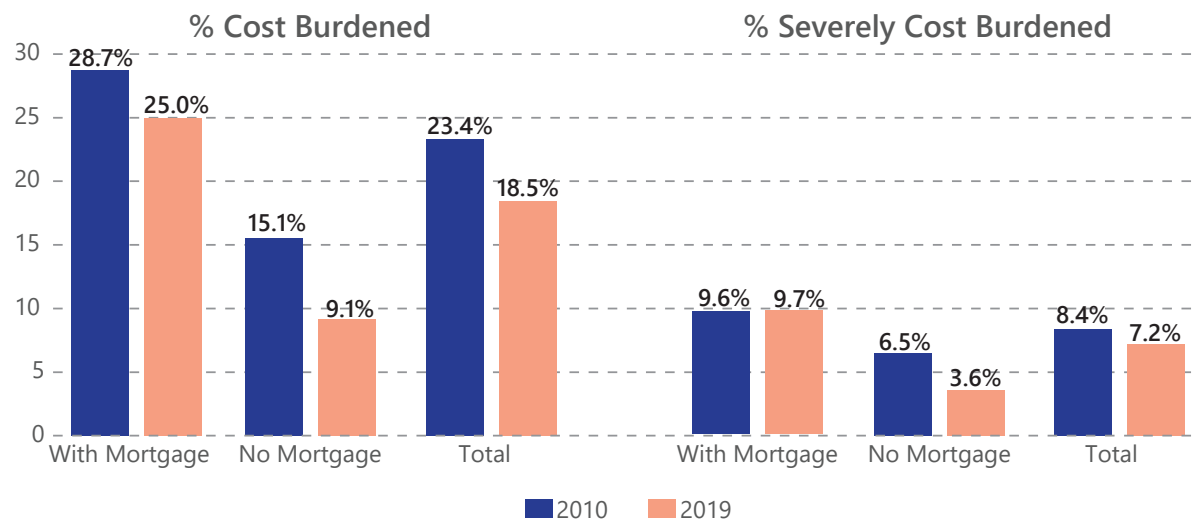


Figure 9: Homeowner Household Cost Burden, 2010-2019



<sup>16</sup> U.S. Census Bureau. 2000 Decennial Census. Table H069; U.S. Census Bureau. American Community Survey 2006-2010 and 2015-2019 5-Year Estimates. Tables B25070 and B25091

## Renter and Homeowner Affordability by Municipality

Table 7: Cost Burden for Renter and Homeowner Households, 2019

Municipality	Renter Households			Homeowner Households		
	# of renter households	% cost burdened	% severely cost burdened	# of homeowner households	% cost burdened	% severely cost burdened
Village of Cayuga Heights	708	48.7	19.8	772	11.7	5.3
Village of Dryden	407	44.1	29.3	497	18.1	6.7
Village of Freeville	46	51.3	17.9	148	10.1	7.4
Village of Groton	292	40.4	18.6	640	16.1	5.4
Village of Lansing	1,112	50.4	25.5	533	27.2	17.4
Village of Trumansburg	275	53.1	25.1	523	23.5	4.8
Town of Caroline	558	38.4	14.1	761	19.3	8.0
Town of Danby	303	58.7	37.5	1,146	16.8	5.1
Town of Dryden	1,891	46.2	27.3	4,045	16.4	6.2
Town of Enfield	345	77.3	30.1	1,159	17.8	6.0
Town of Groton	482	30.9	14.1	1,895	18.1	6.7
Town of Ithaca	3,273	57.2	32.1	3,644	23.1	9.2
Town of Lansing	2,062	50.3	25.5	2,919	22.5	11.0
Town of Newfield	550	63.4	44.7	1,652	16.5	7.3
Town of Ulysses	445	46.3	24.0	1,765	20.2	4.8
City of Ithaca	7,954	71.1	49.5	2,769	12.9	5.0
<b>Tompkins County</b>	<b>17,863</b>	<b>60.6</b>	<b>37.6</b>	<b>21,755</b>	<b>18.5</b>	<b>7.2</b>

## For-Sale Homes Trends

Similar to the rest of the country, the availability and affordability of for-sale housing became a more pressing issue in 2020. Moreover, because Tompkins County already had a tight housing supply before the COVID-19 pandemic, the shortage is being felt even more profoundly here, as illustrated by the figures in Table 8.

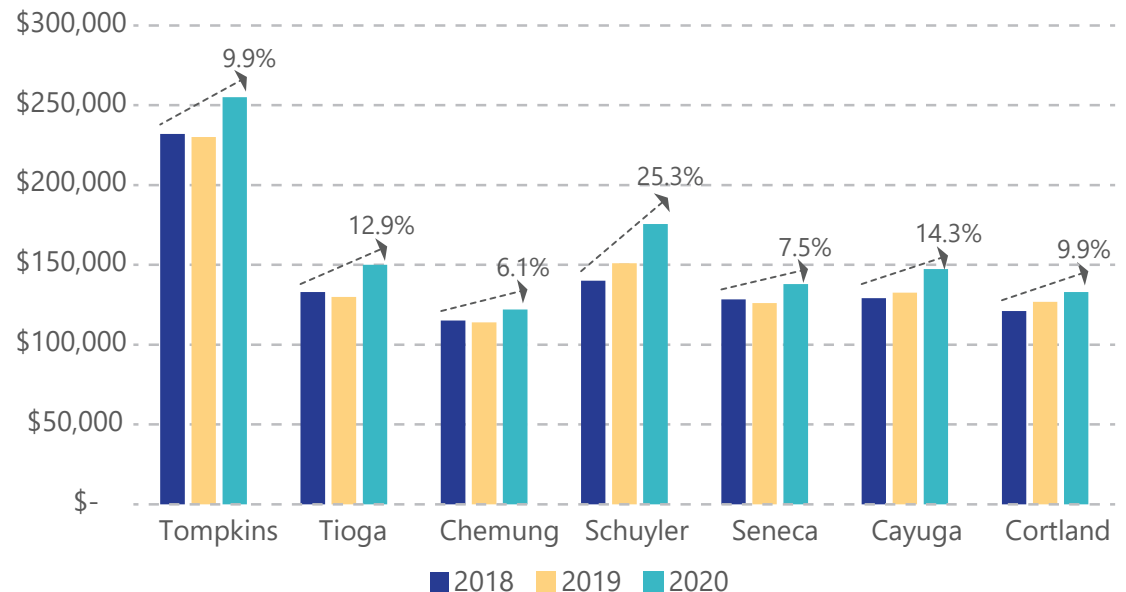
- The number of new listings in 2020 was lower than the figures for the two previous years, falling by 17.5 percent between 2019 and 2020.
- Over the past three years, the months supply of inventory (the number of months it would take for the current inventory of homes on the market to sell given the current sales pace) has been declining, demonstrating the severe shortage. This shortage in for-sale housing is in turn significantly contributing to the increased cost of housing.
- The median sales price for a home in Tompkins County rose by \$25,000, a 9.9 percent increase between 2019 and 2020. Neighboring counties also experienced substantial increases in homes sales prices as shown in Figure 10; however, the median sales prices in these counties still remain far below that of a home in Tompkins County.<sup>18</sup>

# HOMES SALES MARKET CONDITIONS

**Table 8: Tompkins County Real Estate Market Data**

	2018	2019	2020
New Listings	1,102	1,226	1,011
Total Closed Sales	724	821	774
Months Supply of Inventory	3.3	2.6	1.5
% of List Price Received	96.6	96.8	97.6
Median Sales Price	\$232,000	\$230,000	\$255,000

**Figure 10: Median Sales Price, 2018-2020**



<sup>18</sup> New York State Association of Realtors. Information is deemed reliable but not guaranteed.



## Median Rent

Just as for-sale housing costs have been rising, rents have also significantly increased. The 50th percentile rent, or median rent, as defined by the U.S. Department of Housing and Development (HUD), is considered to be the gross rent (cost of shelter plus utilities, excluding telephone, television, and Internet service).

The median rent for all unit sizes has increased by at least 18 percent since 2010, with the rents of larger units (two-plus bedrooms) rising more than those of smaller units (studios and one-bedrooms) as shown in Figure 11. Of all unit types, the median rent for studios increased the least but still grew by 18.7 percent. Three-bedroom units experienced the greatest increase between 2010 and 2020, with median rent rising by 34.3 percent.

The average pace of rent growth was slower in the second half of the decade for all unit types excluding studios. The average annual growth rate between 2016 and 2020 was lower than that of the 2010-2015 period as shown in Table 9.<sup>19</sup>

HUD commonly uses Fair Market Rents (FMR), which is the 40th percentile rent, to determine payment amounts and rent ceilings for various government-subsidized housing programs. While the FMR trends are consistent with median rent trends, more specific data about FMR is in Appendix B. Additionally, estimated median rents are available for 2021 and 2022 and are in Appendix C.

# RENTAL MARKET CONDITIONS

Figure 11: Median Rent, 2010-2020\*

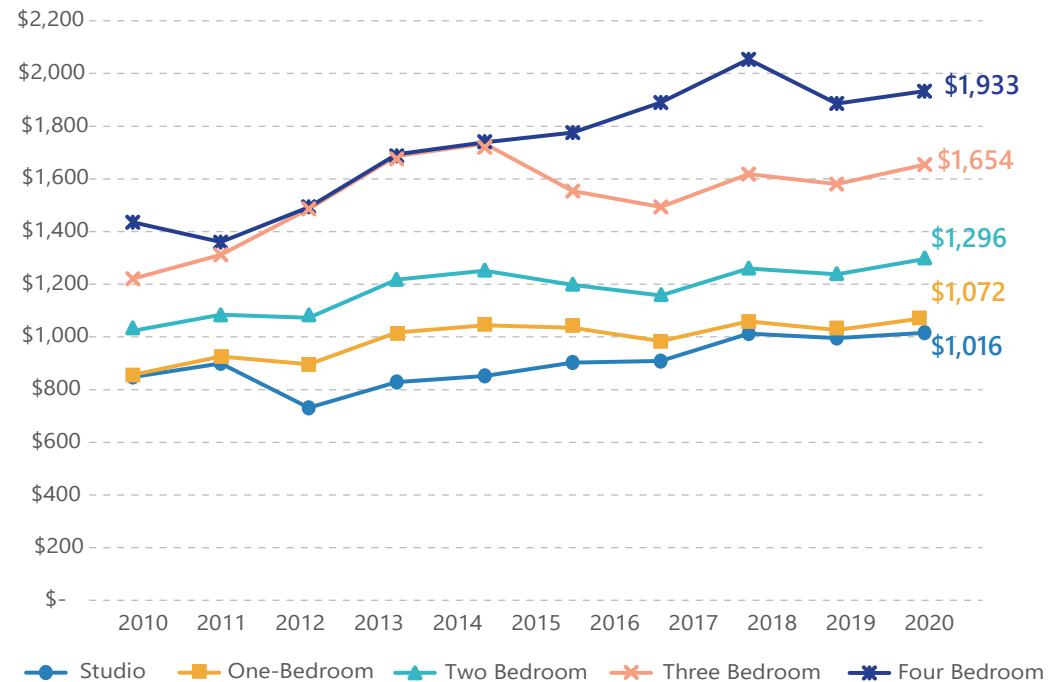


Table 9: Average Annual Growth Rates (AAGR) by Unit Size

Time Period	Studio	One BR	Two BR	Three BR	Four BR
2010-2015 AAGR	0.5%	4.0%	4.1%	7.2%	4.0%
2016-2020 AAGR	3.7%	0.6%	0.8%	-0.7%	2.3%
2010-2020 AAGR	2.1%	2.3%	2.4	3.7%	3.1%

\*Note: Rents in Figure 9 are not adjusted for inflation. Based on a rough estimation of 2010 rents in 2020 dollars, the median rents in Tompkins County for all unit sizes has outpaced inflation growth. If unit rents increased at the same rate as inflation, the following would be the approximate 2020 median rents:

Studio: \$1,019  
1 BR: \$1,029

2 BR: \$1,228  
3 BR: \$1,467

4 BR: \$1,724

<sup>19</sup>U.S. Department of Housing and Urban Development, Office of Policy Development and Research. 50th Percentile Rent Estimates

## Portrait of Rental Affordability

To afford the median rent for a one-bedroom unit in Tompkins County, a worker would need to earn at least \$42,880 per year to keep rental housing expenses at or below 30 percent of income. As shown in Table 10, many of the occupations that employ the most people in the county do not offer wages high enough to allow for rent to stay affordable. Figure 12 is an illustration of the rental costs affordable for certain occupations in relation to the one-bedroom median rent. Further, data also indicate that housing is often too expensive for those that provide essential services in the community. As a result, much of the local workforce is unable to afford the median rent for a one-bedroom apartment or even a studio apartment, which has a median rent of \$1,016.<sup>20</sup>

## Annual Earnings Needed to Afford 2020 Median Rent @ 30% of Income

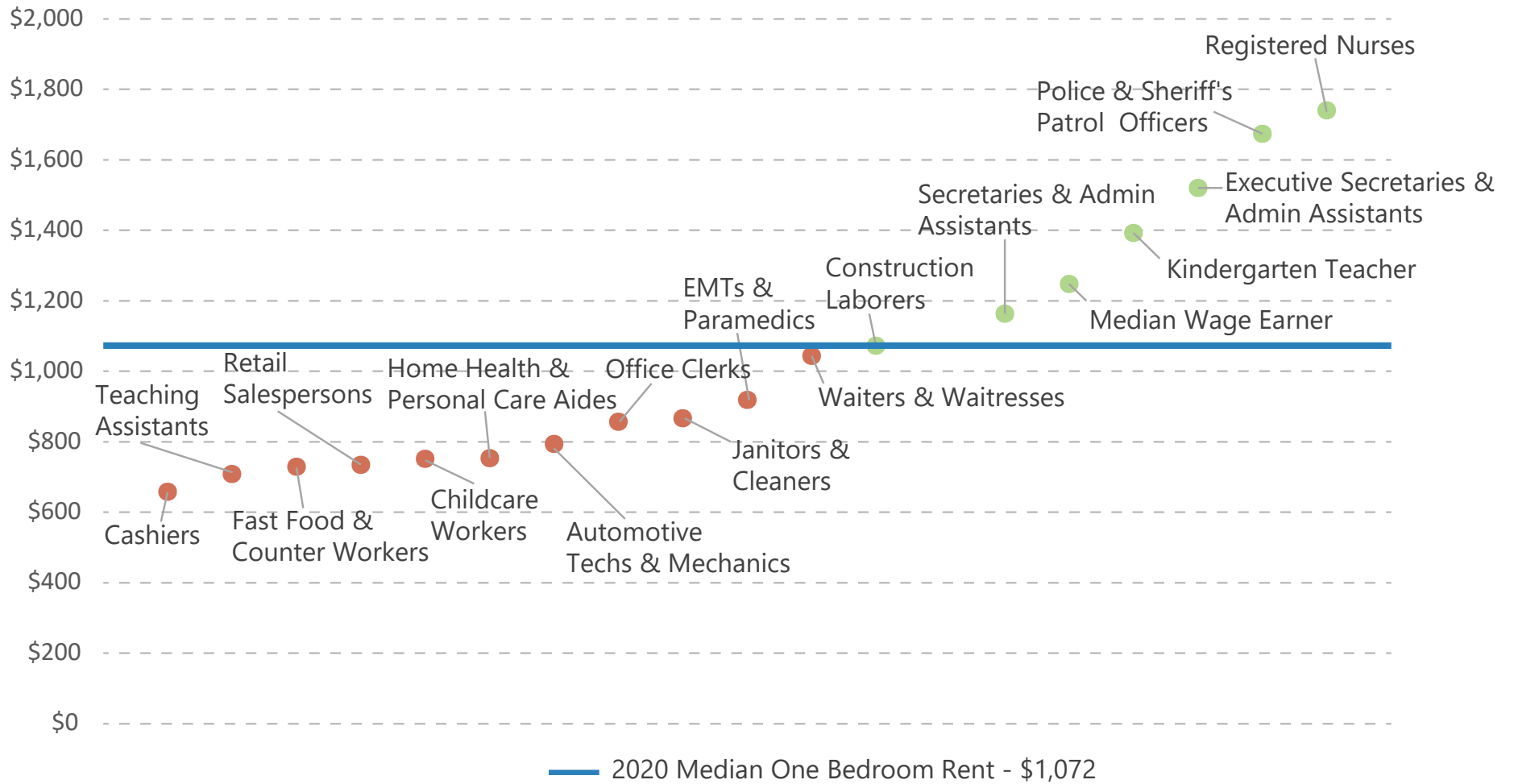
Unit	Rent	Earnings
Studio	\$1,016	\$40,640
One Bedroom	\$1,072	\$42,880
Two Bedroom	\$1,296	\$51,840
Three Bedroom	\$1,654	\$66,160
Four Bedroom	\$1,933	\$77,320

**Table 10: Rental Affordability by Occupation**

Occupation	Percentage of Tompkins County Workforce	Median Annual Wage	Rental Costs Affordable at Current Wage	1 Bedroom Median Rent (2020)	Gap in Monthly Rent	% of Current Annual Wages Needed to Afford Median Rent
Office Clerks	2.8%	\$34,240	\$856	\$1,072	-\$216	37.6%
Secretaries & Admin Assistants	2.6%	\$46,510	\$1,163		\$91	27.7%
Retail Salespersons	2.6%	\$29,370	\$734		-\$338	43.8%
Janitors and Cleaners	2.4%	\$34,630	\$866		-\$206	37.1%
Cashiers	2.1%	\$26,320	\$658		-\$414	48.9%
Executive Secretaries & Admin Assistants	2.1%	\$60,780	\$1,520		\$448	21.2%
Teachers, Kindergarten - High School	2.1%	\$55-670 - \$64,890	\$1,392 - \$1,622		\$320 - \$550	19.8 - 23.1%
Registered Nurses	1.8%	\$69,610	\$1,740		\$668	18.5%
Fast Food & Counter Workers	1.7%	\$29,140	\$729		-\$343	44.1%
Teaching Assistants	1.5%	\$28,310	\$708		-\$364	45.4%
Childcare Workers	0.9%	\$30,020	\$751		-\$321	42.9%
Home Health & Personal Care Aides	1.4%	\$30,110	\$753		-\$319	42.7%
Emergency Medical Technicians & Paramedics	0.2%	\$36,700	\$918		-\$154	35.1%
Police & Sheriff's Patrol Officers	0.5%	\$66,960	\$1,674		\$602	19.2%
Construction Laborers	0.2%	\$42,880	\$1,072		\$0	30.0%
Waiters & Waitresses	1.2%	\$41,700	\$1,043		-\$29	30.8%
Automotive Service Technicians & Mechanics	0.4%	\$31,710	\$793		-\$279	40.6%
Median Wage Earner (All Jobs)		\$49,880	\$1,247	\$175	25.8%	

<sup>20</sup> U.S. Department of Housing and Urban Development, Office of Policy Development and Research. 50th Percentile Rent Estimates ; U.S. Department of Labor, Bureau of Labor Statistics, Occupational Employment Statistics Survey. May 2020

Figure 12: Rental Affordability by Occupation





# **TRACKING HOUSING TARGETS**

## Total Housing Development

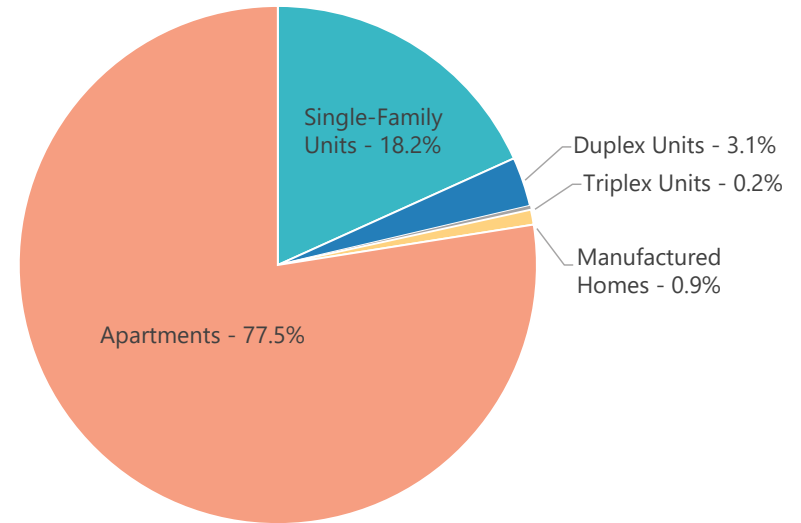
Local data indicates that while there is progress in meeting the targets outlined in the 2017 Housing Strategy, there remains substantial need for more housing development. The 2017 Housing Strategy called for the construction of thousands of units of rental and for-sale units to meet the needs of current and future Tompkins County residents. Yet, overall housing development has been insufficient to meet the targets set in the Strategy.

The following pages will offer some insight on the progress made in meeting the targets and improving housing affordability and choice in Tompkins County; however, the data are imperfect as the county does not track housing development as outlined in the Housing Strategy goals. Available data are tracked from 2016, when the Housing Needs Assessment was completed, which informed the 2017 Housing Strategy.

# HOUSING TARGETS

**Total Units Developed: 2,465**

Figure 1: Types of Housing Constructed in Tompkins County, 2016-2020

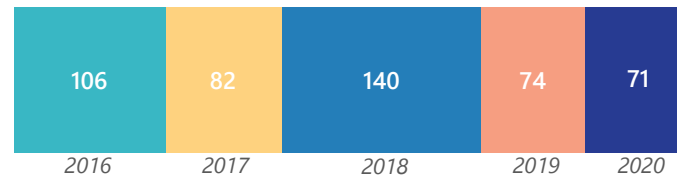


## Single-Family Home Development



Figure 2: Number of Single Family Units Built by Year

Includes single-family structures and manufactured homes



**Total: 473**

Single-Family Homes: 450

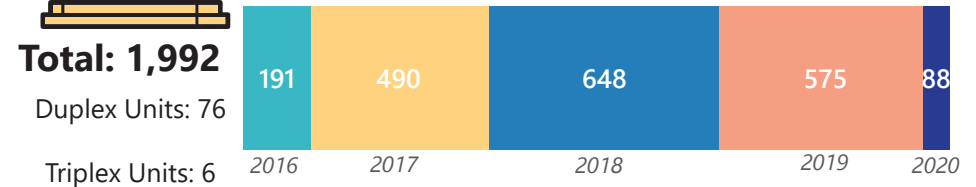
Manufactured Homes: 23

## Multifamily Development



Figure 3: Number of Multifamily Units Built by Year

Includes apartments, duplexes, and triplexes



**Total: 1,992**

Duplex Units: 76

Triplex Units: 6

Apartments: 1,910

# SENIOR HOUSING

### Goals:

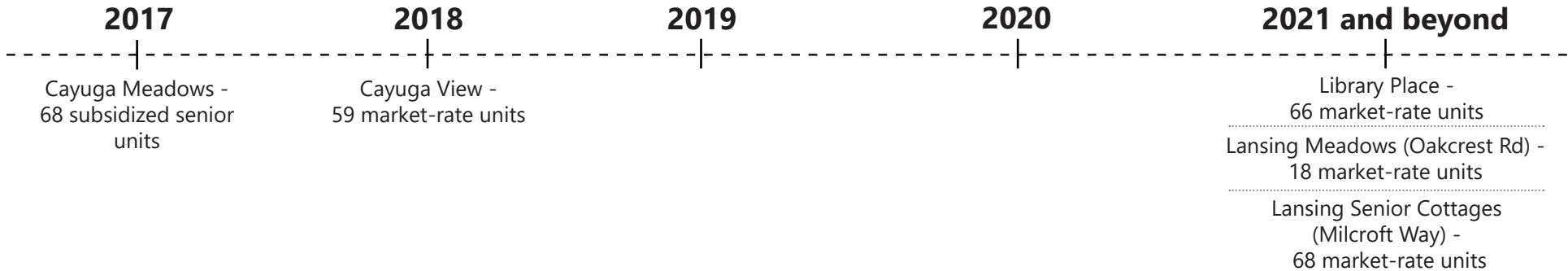
- Meet existing deficit of 100 - 200 subsidized senior apartments
- At least one Medicaid Assisted Living Program facility
- Market-rate senior housing units with services and congregate care facilities to be determined based on future vacancies and wait lists given recent expansions

### Status Report

Since 2016, there has been some progress in developing senior housing in Tompkins County.

- 68 subsidized senior housing units have been built since 2016. If another similarly-sized project is developed in the next five years, the county will reach its goal of 100-200 subsidized senior apartments.
- 59 market-rate units have been added, with 152 anticipated units that are in the planning and development or construction phases.
- There has been no progress on establishing a Medicaid Assisted Living Program facility in the county.

### Senior Housing Development Timeline



Sources: Tompkins County Departments of Assessment, Planning and Sustainability, and Information and Technology Services; Ithaca Voice, Ithaca Times

# SUPPORTIVE HOUSING / SPECIAL NEEDS BEDS

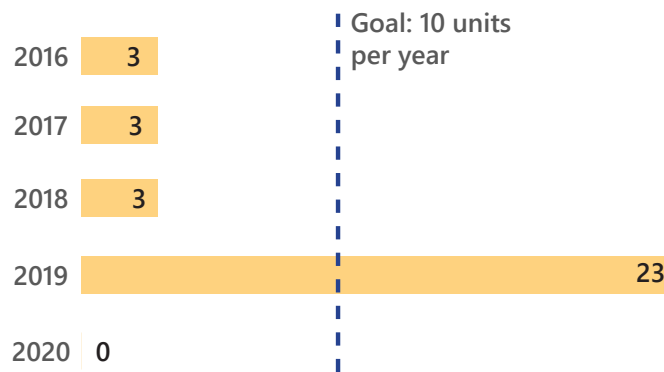
## Goals:

- 100 beds of permanent supportive housing over 10 years (excluding West End Heights) / Average: 10 per year
- 100 Single Room Occupancy (SRO) beds reserved for under 30 percent Area Median Income (AMI) / Average: 10 per year

## Status Report

Tompkins County is set to meet its supportive housing goals, having already seen the development of 32 supportive housing units, with 144 more under construction or proposed as shown in Figures 2 and 3. Progress on SRO beds has been slower with the development of only four SRO beds.

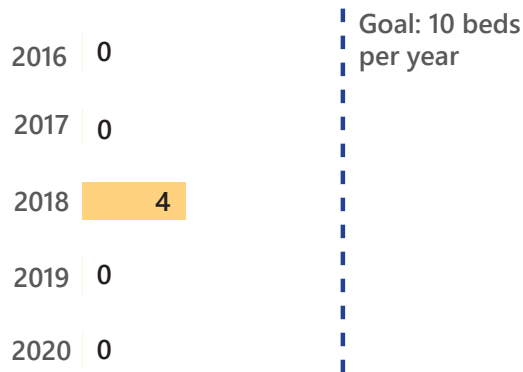
Figure 2: Number of Supportive Housing Units Built by Year



Goal by 2020: 50 units

Accomplished: 32

Figure 3: Number of SROs Built by Year



Goal by 2020: 50 beds

Accomplished: 4

## Active & Proposed Developments

### West End Heights (Lakeview Health Services)

#### Expected Completion: 2021

- 60 one-bedroom apartments designated for households with incomes below 60% AMI
- 30 units reserved for individuals with mental health diagnoses (10 of whom are also homeless), 30 units for those below 60% AMI (8 of whom are homeless or have special needs related to substance abuse and/or HIV/AIDS).

### Arthaus (Vecino Group)- Expected Completion: 2021

- 40 housing units for formerly foster, homeless, or at-risk youth, ages 19-26

### Dryden House (Second Wind Cottages) - Expected Completion: 2022

- Four housing units for homeless and at-risk adult women and children

### Asteri (Vecino Group)- Expected Completion: 2023

- 40 units for populations at risk of homelessness

### Sunflower House (OAR, UAR, INHS)

- 12 beds for transitional housing for recently incarcerated men

Total Proposed Supportive Housing: 144 units

Total Proposed Single Room Occupancy: 12 beds

# WORKFORCE HOUSING

## Goals - Ownership Housing:

- 380 new ownership units per year for a total of 3,800 new ownership units through 2025
  - 300 single-family homes per year (90 units between \$150,000 - \$199,999 price range; 210 units at \$200,000+)
  - 80 condominiums per year (35 units between \$150,000 - \$199,999 price range; 45 units at \$200,000+)

## Status Report

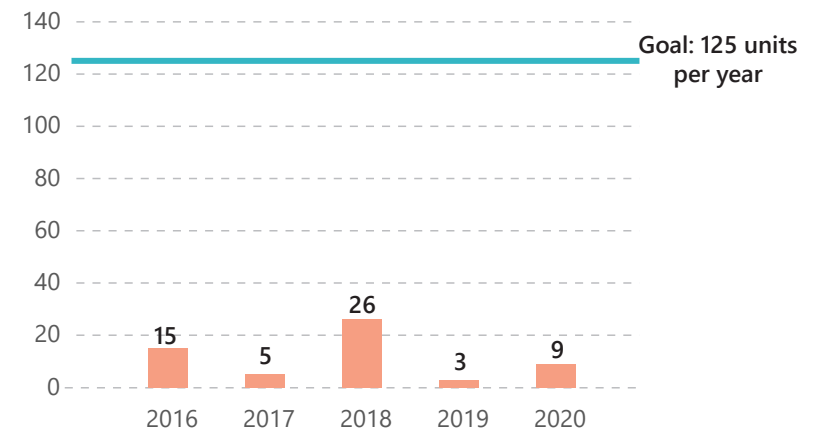
The following figures represent units built since the beginning of 2016 based on Tompkins County Assessment data. While the goals discuss new ownership or new rental units, the county does not track whether housing units are for rent or for sale. These ownership figures provide estimates based on the assumption that newly constructed single-family units and manufactured homes will be primarily owner-occupied. Additionally, the data described below does not separate condominiums from single-family homes.

An estimated total of 473 for-sale units were built between 2016 and 2020 in Tompkins County, far below the goal of 1,900 ownership units at the 5-year mark. Figures 4 and 5 show the progress on the goals at each price range.

In addition to the shortfall in the construction of new housing units, the affordability of the units constructed do not meet the county's targets.

- 58 for-sale units with assessed values between \$150,000 and \$199,999 were built between 2016 and 2020, far below the goal of 625 units for five-year period.
- 368 for-sale units with assessed values greater than \$200,000 were built between 2016 and 2020, far below the goal of 1,275 units for the five-year period.
- The median assessed value for single-family homes built between 2016 and 2020 was \$265,000.

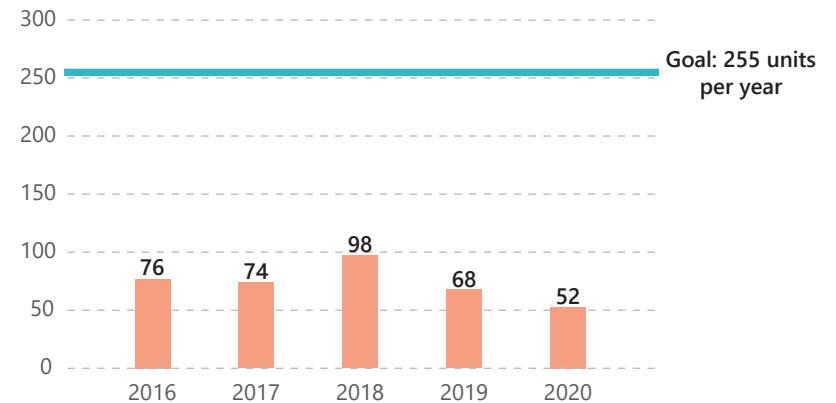
Figure 4: Ownership Housing Units Built, \$150,000 - \$199,999



**Goal by 2020: 625**

**Accomplished: 58**

Figure 5: Ownership Housing Units Built, \$200,000+



**Goal by 2020: 1,275**

**Accomplished: 368**



# WORKFORCE HOUSING

## Goals - Rental Housing:

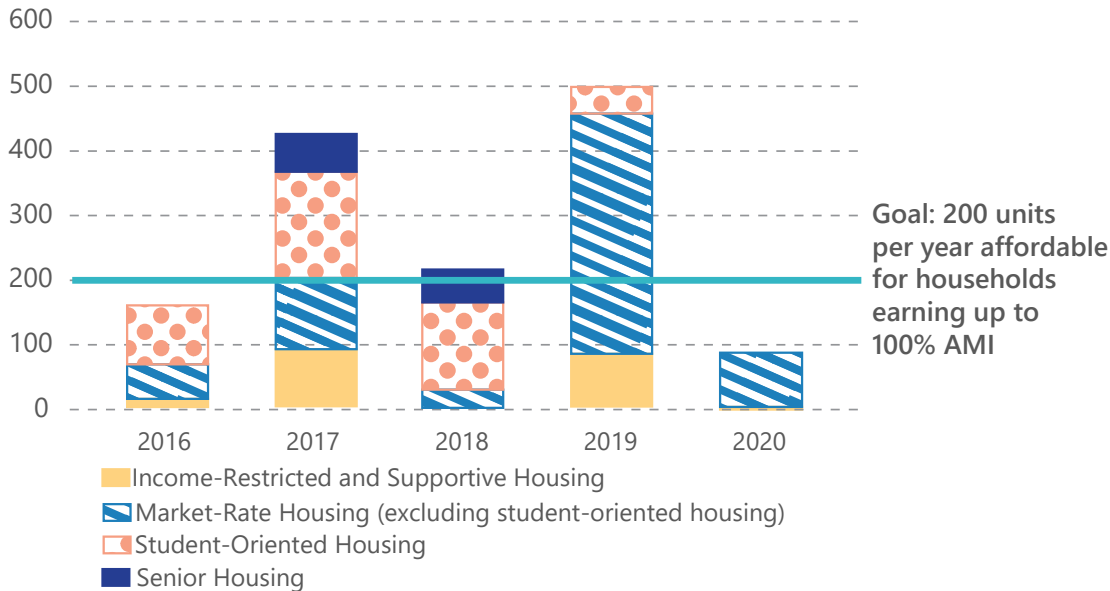
- 200 new rental units per year affordable for those earning up to 100 percent of AMI, for a total of 2,000 new rental units through 2025

## Status Report

Since 2016, there has been a net gain of approximately 1,585 rental units in Tompkins County. An estimated 407 units were demolished for redevelopment during this period. This estimate assumes that all multifamily units (duplex, apartment, etc.) will be renter-occupied. A substantial number of the non-subsidized units are being built in Collegetown in Ithaca and are mainly marketed to the student population. This leaves approximately 867 market-rate units directed to the general public.

It is difficult to determine the rents of non-subsidized rental units on the market, so it is unclear how many units are affordable for those earning up to 100 percent of AMI. However, approximately 217 subsidized, affordable rental units, designated for households earning up to 80 percent of AMI, have come on the market in the past five years. If this figure is an indication of the development of affordable units, there remains a substantial lack of affordable rental housing in the county. Figure 6 illustrates the total development of rental housing and provides an indication of the progress on affordable units.

Figure 6: Rental Units Built, 2016-2020



**1,585**

Net rental housing units added between 2016 and 2020

**217**

New income-restricted rental housing units built between 2016 and 2020

**739**

New non-student oriented market-rate housing units built between 2016 and 2020

**502**

New student-oriented housing units built between 2016 and 2020

**127**

New senior housing units built between 2016 and 2020

# STUDENT BEDS

## Goals

- Meet existing deficit of 1,400 to 1,500 on-or off-campus, purpose-built student beds
- Add beds to meet any increases in enrollment

## Status Report - Student Population

Enrollment at Tompkins County's higher education institutions has varied since the 2016-17 academic year. Cornell University's enrollment increased by over 1,500 students between 2016 and 2019, while Ithaca College's and Tompkins Cortland Community College's (TC3) enrollments decreased by 412 and 705 students, respectively. Data for 2020 enrollment is not yet available.

These institutions have varying impacts on the housing market:

- Cornell University has added 1,519 students since 2016 and 2,772 students since 2010, putting additional pressure on a housing market that has long struggled with supply and affordability challenges. Construction of new on-campus housing and other student-oriented housing is in progress, which may address ongoing supply and affordability issues.
- While Ithaca College guarantees housing for its students, it does not have the capacity for them with only approximately 4,400 on campus beds. Even though enrollment has been declining, there remains a substantial student population that has to live off campus.
- TC3 likely does not have a substantial impact given that a significant portion (57.9 percent) of its students are in the CollegeNow program, a college-high school dual enrollment program. Further, TC3's location in Dryden near Cortland County means that the college's associated housing demand affects areas with less housing demand than the Ithaca urban area.

Table 1: Higher Education Enrollment

Cornell (including NYS statutory colleges)				
	Undergraduate	Graduate	Professional	Total
2016	14,566	6,546	1,041	22,153
2017	14,907	6,783	1,065	22,755
2018	15,182	7,061	1,074	23,317
2019	15,043	7,535	1,094	23,672
<b>2016-19 Difference</b>	<b>477</b>	<b>989</b>	<b>53</b>	<b>1,519</b>

Ithaca College				
	Undergraduate	Graduate	Professional	Total
2016	6,221	283	174	6,678
2017	6,059	283	174	6,516
2018	6,101	244	172	6,517
2019	5,852	246	168	6,266
<b>2016-19 Difference</b>	<b>-369</b>	<b>-37</b>	<b>-6</b>	<b>-412</b>

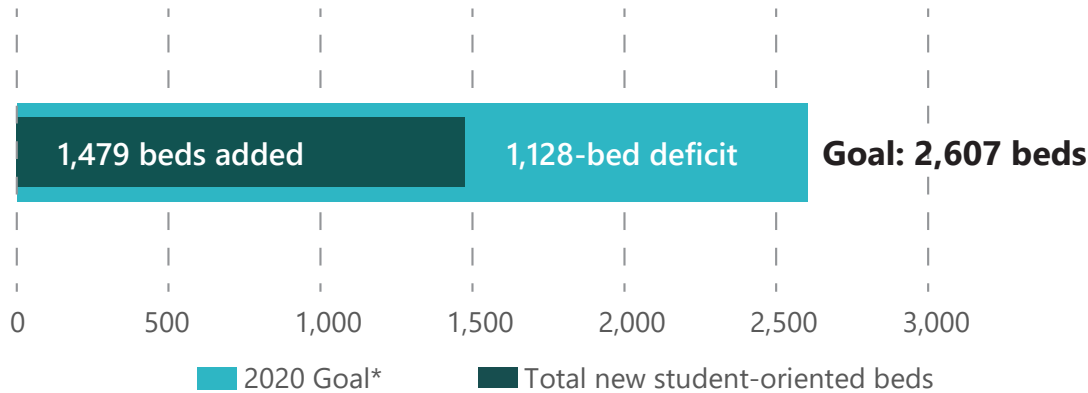
Tompkins-Cortland Community College				
	Undergraduate (FT)	Undergraduate (PT)	Total	CollegeNow HS enrollment
2016	2,028	3,723	5,751	3,004
2017	1,917	3,429	5,346	2,822
2018	1,695	3,309	5,004	2,844
2019	1,546	3,500	5,046	2,920
<b>2016-19 Difference</b>	<b>-482</b>	<b>-223</b>	<b>-705</b>	<b>-84</b>

Sources: Ithaca College Residence Halls, <https://www.ithaca.edu/residential-life/living-campus/residence-halls>; New York State Education Department, Student Information Repository System

## Status Report - Student Beds

This goal will shift annually based on changes in enrollment at the higher education facilities in Tompkins County. As shown in Figure 7, as of 2020, the goal was 2,607 beds which is the existing deficit plus the changes in enrollment. As of 2020, approximately 1,479 beds have been added to the housing inventory, leaving a resulting gap of 1,128 beds. However, there are several active and proposed projects that will substantially help address the shortage.

Figure 7: Student Bed Development, 2016-2020



Note: The goal will change annually depending on changes in enrollment. The 2020 goal is 1,500 beds (from the original goal) plus the total enrollment change for Cornell University and Ithaca College. TC3 is not included given that their students do not have a substantial impact on the housing market.

## Active & Proposed Projects

Development	Beds
The Ruby	40
Catherine Commons	339
Outlook Apartments	153
411-15 College Ave	70
North Campus Expansion Phase I	821
North Campus Expansion Phase II	1,244
121 Oak Avenue	40
325 Dryden Rd & 320 Elmwood	13
238 Dryden Road	16
<b>Total</b>	<b>2,736</b>



# DEVELOPMENT FOCUS AREAS

The 2017 Tompkins County Housing Strategy proposed that the majority of new units be located in specific locations to meet the needs and preferences of households while also promoting the efficient use of infrastructure, protection of agricultural land and open spaces, and optimal use of public transportation. These identified locations are referred to as Development Focus Areas (DFA). The Strategy outlined the following proposed location goals for new units related to these DFAs shown in Figure 8.

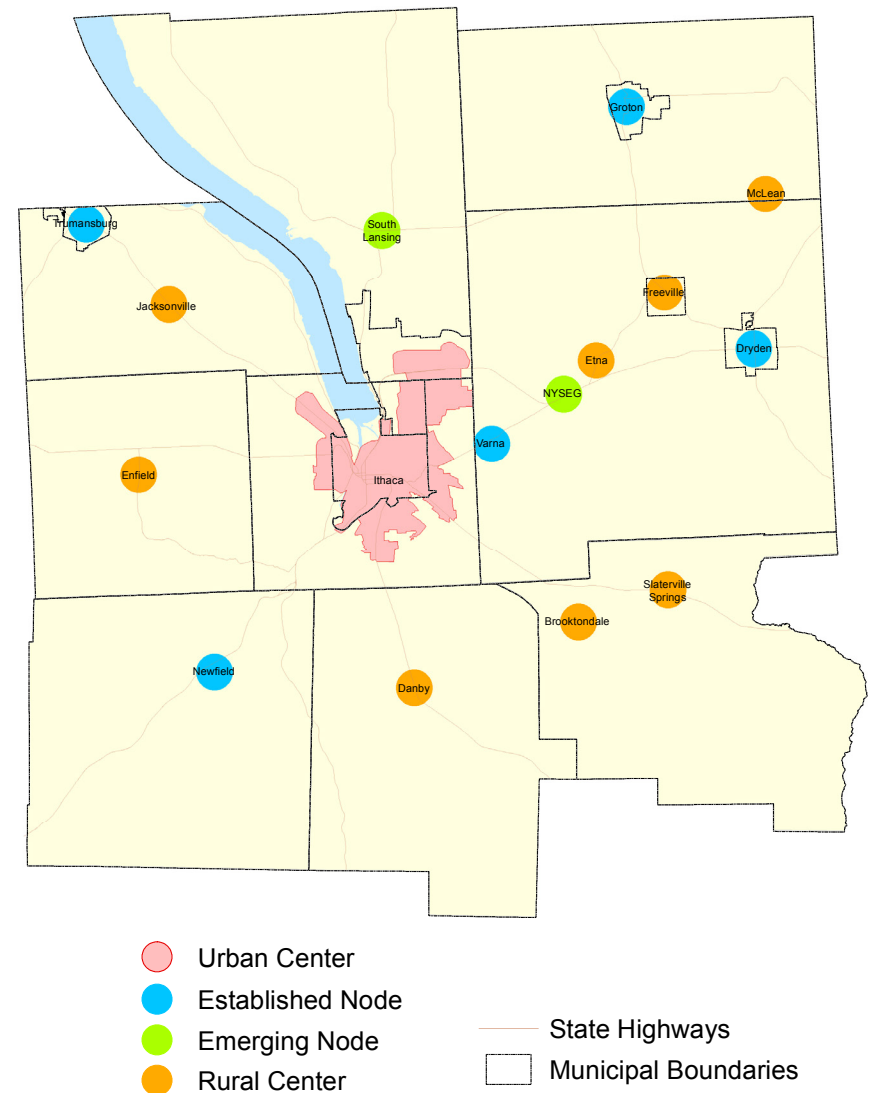
- At least 350 units (excluding student beds) in the Urban Center
- 50-100 units annually in Established and Emerging Nodes
- 30 units annually in Rural Centers
- 100-150 units annually in other suburban locations (e.g., suburban Lansing)

Progress on these goals can be found in Figures 9-11, with the exception of the last goal, as suburban areas are not clearly defined in the county.

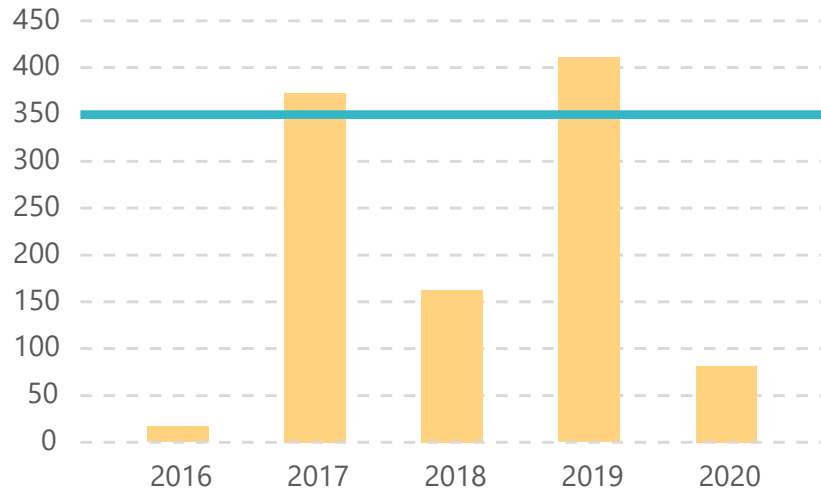
While there has been mixed success in achieving these housing production goals in the designated location, there has been success when it comes to concentrating development in the Development Focus Areas (DFA). Nearly 77 percent of all housing has been constructed in a DFA. However, there is a significant discrepancy between single-family and multi-family development - 20.3 percent of single-family homes and 90.4 percent of multifamily homes were built in a DFA.

Figure 8: Tompkins County Development Focus Areas (DFA)

## Development Focus Areas

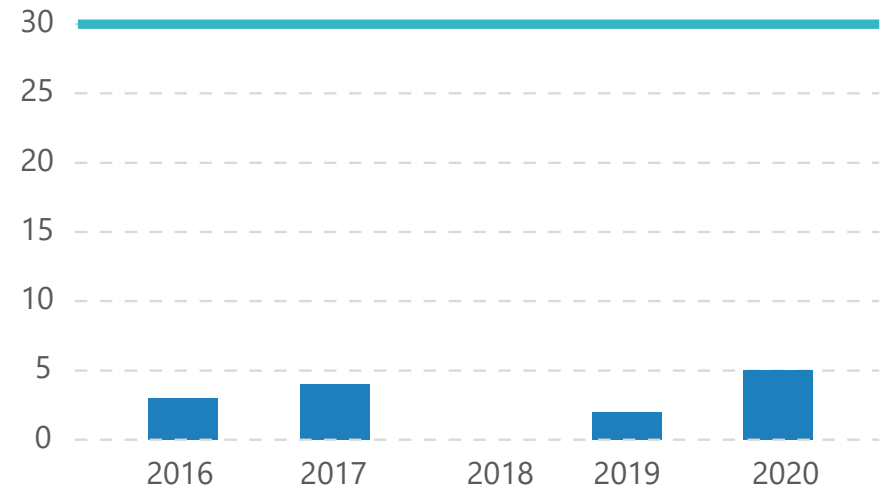


**Figure 9: New Units in Urban Center (excluding student beds)**



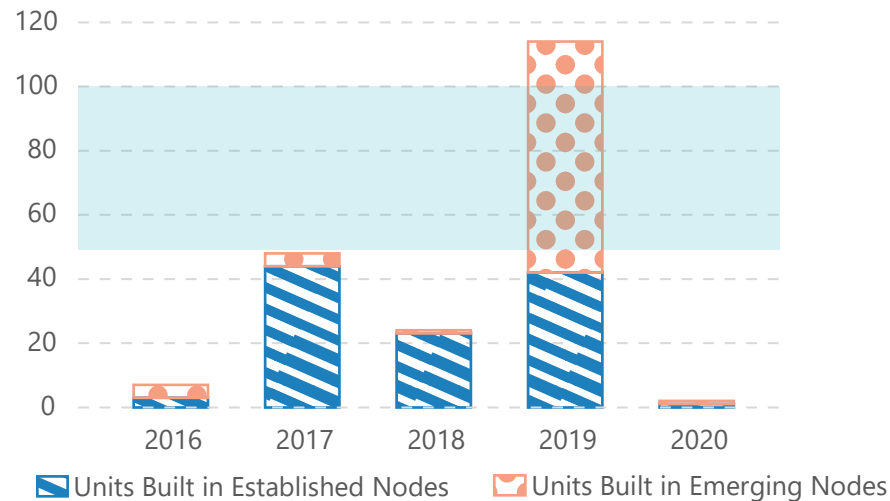
Goal: At least 350 units annually (excluding student beds) in Urban Center

**Figure 11: New Units in Rural Centers**



Goal: 30 units annually in Rural Centers

**Figure 10: New Units in Established and Emerging Nodes**



Goal: 50 - 100 units in Established and Emerging Nodes

**Summary of Development in Development Focus Areas**

- 1,898** Units built in DFAs, 2016-2020
- 1,681** Units built in Urban Center, 2016-2020
- 1,046** Non-Student Units built in Urban Center, 2016-2020
- 113** Units built in Established Nodes, 2016-2020
- 82** Units built in Emerging Nodes, 2016-2020
- 14** Units built in Rural Centers, 2016-2020



# DEVELOPMENT BY MUNICIPALITY

Housing development has been centered near the urban core of Tompkins County, with the City and Town of Ithaca accounting for 59.8 percent of new housing units constructed between 2016 and 2020. The Town of Lansing accounts for an additional 21.6 percent of new housing units in the county. The Town of Dryden also experienced development, adding 196 units. The other municipalities all had growth, as shown in Table 2.

*Table 2: Housing Units Constructed by Municipality 2016-2020*

Local Government	Single-Family	Multi-Family	Housing Units Built 2016-2020
Village of Cayuga Heights	4	0	4
Village of Dryden	4	48	52
Village of Freeville	2	3	5
Village of Groton	2	0	2
Village of Lansing	16	226	242
Village of Trumansburg	4	4	8
<hr/>			
Town of Caroline	21	0	21
Town of Danby	50	8	58
Town of Dryden	77	119	196
Town of Enfield	22	5	27
Town of Groton	33	0	33
Town of Ithaca	27	540	567
Town of Lansing	103	430	534
Town of Newfield	45	17	62
Town of Ulysses	55	6	61
City of Ithaca	40	867	907
<b>Total</b>	<b>473</b>	<b>1,992</b>	<b>2,465</b>



## Data Notes

### Demographic & Housing Trends

Much of the data used in the Demographic and Housing Trends section of this snapshot is derived from the 2010 and 2020 decennial census and the American Community Survey (ACS), which are created by the U.S. Census Bureau. While the data provided by these sources is essential and useful for evaluating trends, several considerations should be taken into account when reading this report.

- Some 2020 decennial census data is now available and referenced in this section. There were likely several challenges with data collection due to the COVID-19 pandemic. Many students left campus before the official Census Day on April 1, 2020, which is the day that determines who is counted and where they are counted. The absence of students could have impacted population figures, as well as occupancy information about housing units. Census data can be challenged through a Count Question Resolution if there are problems with the boundaries of the surveyed geographies, the correct location of living quarters, or the presence of duplicate or excluded living quarters. A more detailed review of census data is forthcoming.
- The ACS data published in this report are all estimates with varying margins of error. The margins of error are not published in this report. While much of the year-to-year data falls outside the margins of error, some of the information is within the margins of error, meaning the estimate could have occurred by chance or error.
- All of the ACS data published in this report are derived from five-year estimates, which is a collection of 60 months of data. As a result, some of the data may not be timely; yet, this estimate is more precise because of the larger sample

# APPENDIX A

size. However, even with the five-year estimate, there can be significant margins of error, particularly for geographies with smaller populations.

- The student population poses a few potential issues with the accuracy of the ACS data. First, student populations can be difficult to count due to the transitory nature of their residency. Further, the student population could skew numbers such as income estimates as many students do not hold full-time jobs; however, they may have funds to spend through loans or money provided by parents or guardians.

Because multiple data sources are used, each of which has a different methodology, there may be discrepancies in the data, particularly when comparing the employment and commuting estimates. These estimates are intended to provide an overview of trends and are not intended to be precise.

### Tracking Housing Targets

The data in this report are primarily derived from an analysis of Tompkins County assessment data. For example, the types of housing (apartments, single-family, etc.) were identified using property class codes from assessment data and grouped in such a way to best describe the type of development that has occurred in the county since 2016.

Additionally, specific estimates of new units may vary from previous reports given changes in how a property is categorized in assessment data from year to year.

## Fair Market Rent

The Fair Market Rent (FMR), as defined by the U.S. Department of Housing and Urban Development, is considered the gross rent (cost of shelter plus utilities, excluding telephone, television, and Internet service). FMR represents the 40th percentile of gross rents in the county. Sixty percent of rental units are more expensive, and 40 percent are less expensive than the FMR.

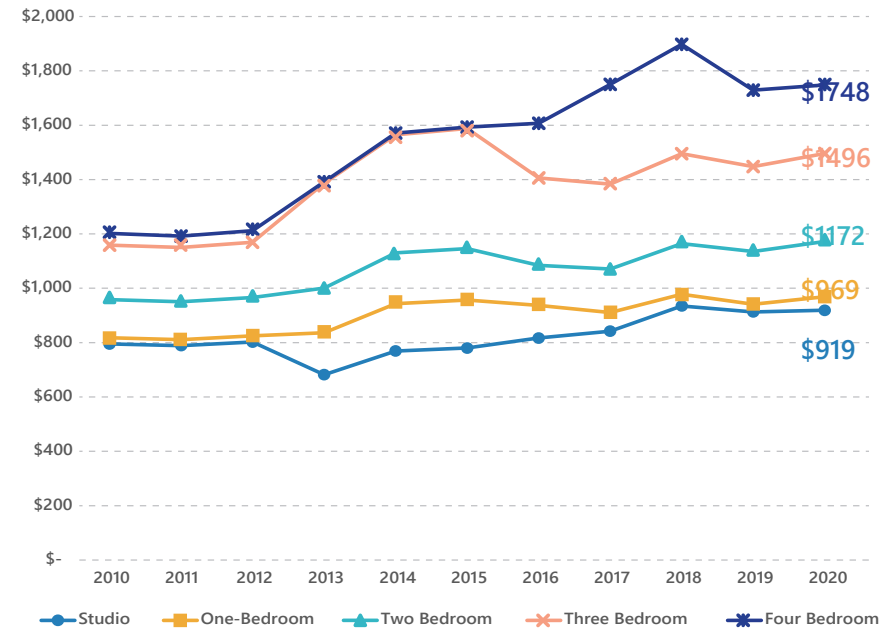
The FMR for all sizes of rental units has increased by at least 15 percent since 2010, with the larger units with more bedrooms increasing more than smaller studio and one-bedroom rents. Between 2010 and 2020, the FMR for studios increased by 15.6 percent while the FMR for four-bedroom units increased by 45.4 percent. Like median rents, the rate of growth had extreme year-to-year fluctuations but slowed in the second half of the decade, with the exception of studio units. This trend appears to be reversing based on released 2021 and 2022 FMRs found in Appendix C.

**Table 8: Average Annual Growth Rates (AAGR) by Unit Size**

Time Period	Studio	One BR	Two BR	Three BR	Four BR
	Rent	Rent	Rent	Rent	Rent
2010	\$795	\$818	\$818	\$1,159	\$1,202
2011	\$789	\$811	\$811	\$1,150	\$1,192
2012	\$802	\$825	\$825	\$1,169	\$1,212
2013	\$682	\$836	\$836	\$1,387	\$1,392
2014	\$769	\$943	\$943	\$1,565	\$1,571
2015	\$780	\$957	\$957	\$1,588	\$1,593
2016	\$817	\$937	\$937	\$1,406	\$1,607
2017	\$842	\$911	\$911	\$1,383	\$1,750
2018	\$935	\$978	\$978	\$1,495	\$1,898
2019	\$913	\$941	\$941	\$1,448	\$1,729
2020	\$919	\$969	\$969	\$1,496	\$1,748
2010-2015 AAGR	-1.9%	3.3%	3.8%	6.8%	6.0%
2016-2020 AAGR	3.4%	0.3%	0.6%	-1.0%	2.1%
2010-2020 AAGR	1.7%	1.8%	2.2%	2.9%	4.0%

# APPENDIX B

**Fair Market Rent, 2010-2020**



# APPENDIX C

Median rent and Fair Market Rent data are published by HUD in advance to inform the programs that require this information. At this point, data for 2021 and 2022 are available even though they are not included in the 2020 Housing Snapshot, as the report is meant to showcase trends through 2020. The following chart shows the 2021-2022 data for those two metrics and the percent change from the previous year. As shown in the chart, rental costs for all units excluding four-bedroom units are increasing more than they had in recent years. Rents for four-bedroom units are increasing at a rate comparable to the previous five years.

Time Period	Studio		One BR		Two BR		Three BR		Four BR	
<b>Fair Market Rent</b>										
	Rent	% Change	Rent	% Change	Rent	% Change	Rent	% Change	Rent	% Change
2021	\$980	6.6%	\$1,048	8.2%	\$1,048	8.3%	\$1,619	8.2%	\$1,812	3.7%
2022	\$1,053	7.4%	\$1,127	7.5%	\$1,365	7.6%	\$1,743	7.7%	\$1,851	2.2%
<b>Median Rent</b>										
2021	\$1,078	6.1%	\$1,153	7.6%	\$1,396	7.7%	\$1,781	7.7%	\$1,994	3.2%
2022	\$1,153	7.0%	\$1,234	7.0%	\$1,495	7.1%	\$1,909	7.2%	\$2,027	1.7%