Chapter 20: Orleans County

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Household Growth and Projected Needs

Between 2010 and 2020, the number of households living in Orleans County year-round increased at an average rate of 0.3% per year to 11,698. By 2029, a projected 12,899-13,584 households will live in the county.

Figure 20-1 Projected Orleans County year-round household demand, 2025 and 2029

Year-round households	2010	2020	2025 (projected)		2029 (projected)	
			Lower	Upper	Lower	Upper
Total households	11,320	11,698	12,702	12,987	12,899	13,584
Owner households	8,553	8,799	10,168	10,396	9,837	10,359
Renter households	2,767	2,899	2,534	2,591	3,062	3,225

Source: 2010 and 2010 Decennial Census, 2025 and 2029 projected based on Census Bureau American Community Survey estimates and statewide 2016-2019 average annual growth of 1% ("Lower") and 1.8% in 2019-2022 ("Higher).

Since 2020, demand to live in Vermont has increased while the supply of new homes has not kept pace. To accommodate demand to live in the county and meet other housing market needs such as normalizing the vacancy rate, Orleans County is likely to need a projected 615-1,112 additional homes between 2025 and 2029.

Figure 20-2 Projected year-round homes needed by tenure, 2025-2029

Additional homes needed	Pre-pandemic growth (Lower)	Pandemic-era growth (Upper)
Owner homes	82	312
Renter homes	533	800
Total additional homes needed	615	1,112

Source: VHFA analysis of U.S. Census Bureau data (Building Permits, Housing Completions, American Community Survey estimates, Population and Housing Unit Estimates and Current Population Survey/Housing Vacancy Survey) and the Vermont 2023 Point-In-Time Count of those Experiencing Homelessness. "Pre-pandemic demand" assumes resuming trends that occurred in 2016-2019. "Pandemic-era demand" assumes continuation of trends that occurred in 2019-2022 Assumes a target vacancy rate of 5% for rental and 2% for owner homes and annual housing destruction rate of 0.15%.

Housing Stock

Orleans County's housing stock consists of 16,487 year-round and seasonal homes. The county has a greater proportion of seasonal homes (25%) than the state (15%) and a lesser proportion of year-round rental homes. Orleans County represents 5% of the state's total housing stock.

Figure 20-3 Orleans County housing stock, 2022

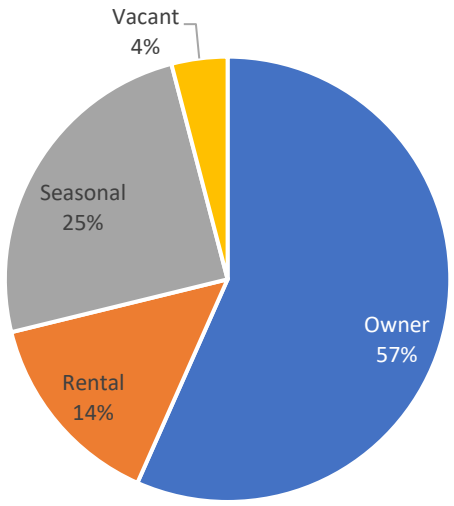


Figure 20-4: Orleans County home types by town

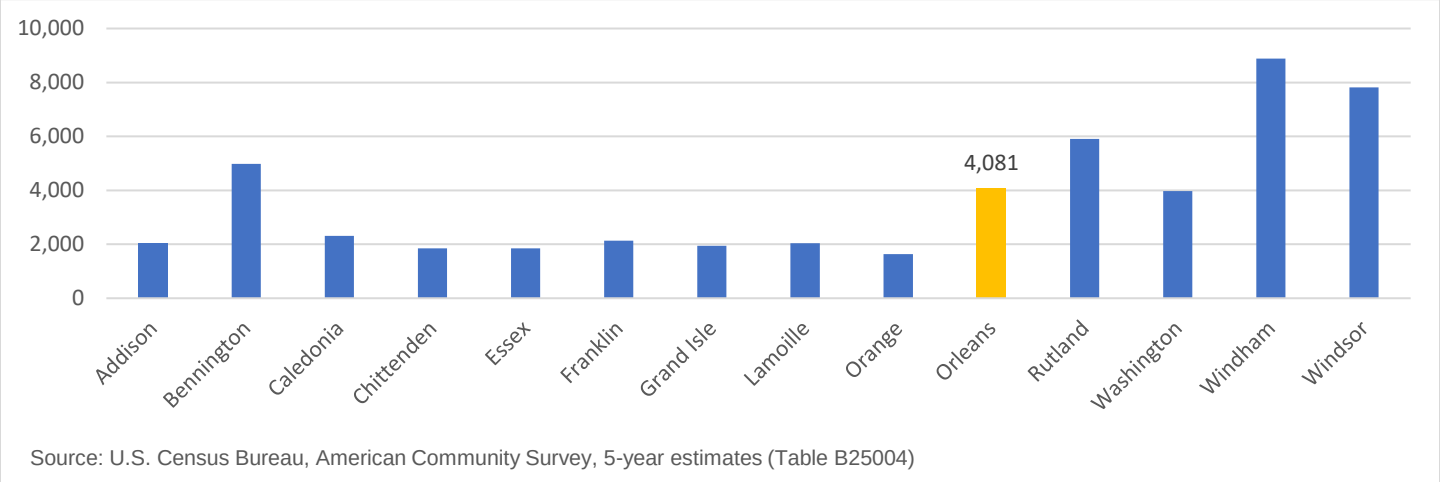
Location	Owner homes	% Owner	Renter homes	% Renter	Seasonal homes	% Seasonal	Vacant homes	% Vacant	Total homes	% of county homes
Orleans County	9,338	57%	2,398	15%	4,081	25%	670	4%	16,487	100%
Albany	384	75%	21	4%	78	15%	32	6%	515	3%
Barton	926	58%	323	20%	234	15%	123	8%	1,606	10%
Brownington	339	63%	68	13%	74	14%	54	10%	535	3%
Charleston	405	69%	43	7%	143	24%	0	0%	591	4%
Coventry	353	80%	63	14%	9	2%	16	4%	441	3%
Craftsbury	407	63%	72	11%	115	18%	51	8%	645	4%
Derby	1,570	63%	389	16%	479	19%	40	2%	2,478	15%
Glover	396	54%	29	4%	282	38%	27	4%	734	4%
Greensboro	243	33%	55	8%	427	58%	11	2%	736	4%
Holland	248	53%	80	17%	121	26%	23	5%	472	3%
Irasburg	437	81%	60	11%	30	6%	12	2%	539	3%
Jay	239	28%	49	6%	546	65%	7	1%	841	5%
Lowell	324	57%	54	10%	168	30%	22	4%	568	3%
Morgan	333	40%	41	5%	433	52%	24	3%	831	5%
Newport City	1,198	50%	804	34%	247	10%	134	6%	2,383	14%
Newport Town	600	69%	143	17%	84	10%	40	5%	867	5%
Troy	587	75%	64	8%	95	12%	37	5%	783	5%
Westfield	186	63%	13	4%	95	32%	1	0%	295	2%
Westmore	163	26%	27	4%	421	67%	16	3%	627	4%

Source: U.S. Census Bureau: American Community Survey 5-year estimates, 2018-2022 (Table B25003, B25004) from housingdata.org.

Seasonal Homes

The latest estimates show that 15% of Vermont's homes are "seasonal, occasional use, or vacation homes", giving the state the second highest rate in the nation. In 2022, there were an estimated 4,081 seasonal or occasional use homes in Orleans County, making up 25% of all homes in the county.

Figure 20-5 Seasonal homes by county, 2022

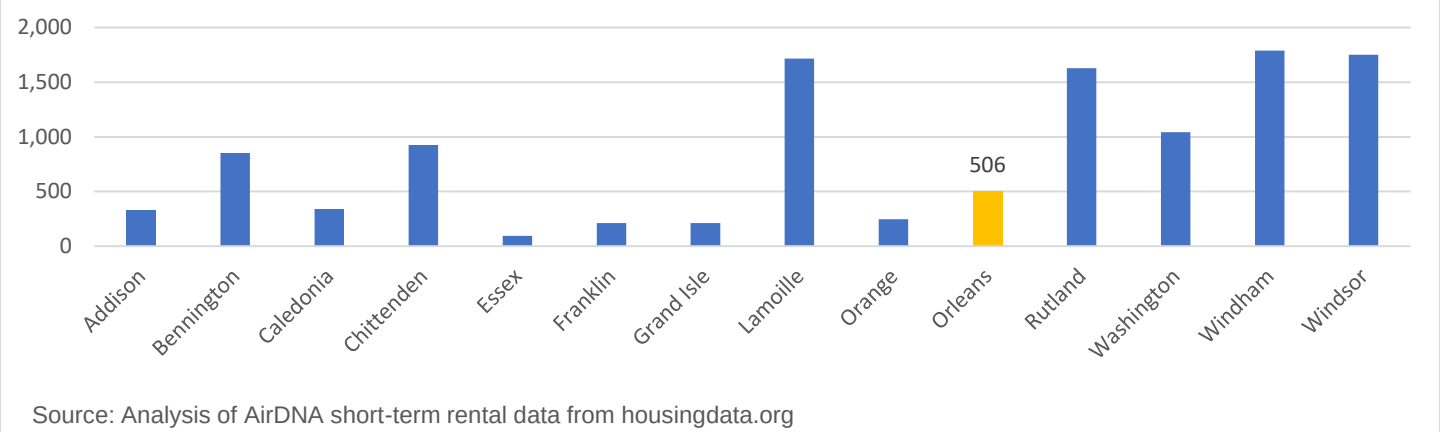


Source: U.S. Census Bureau, American Community Survey, 5-year estimates (Table B25004)

Short-Term Rentals

The number of short-term rentals statewide has risen dramatically in the last ten years. In 2015, fewer than 1,000 homes were listed monthly as short-term rentals; as of September 2023, more than 11,747 homes are being listed. The growth in the short-term rental market has not been equal across the state, however. Counties in southern Vermont or counties that feature one of the state's larger resort towns have the highest share of STRs and have seen the greatest growth.

Figure 20-6 Homes used as short-term rentals by county, Oct. 2023

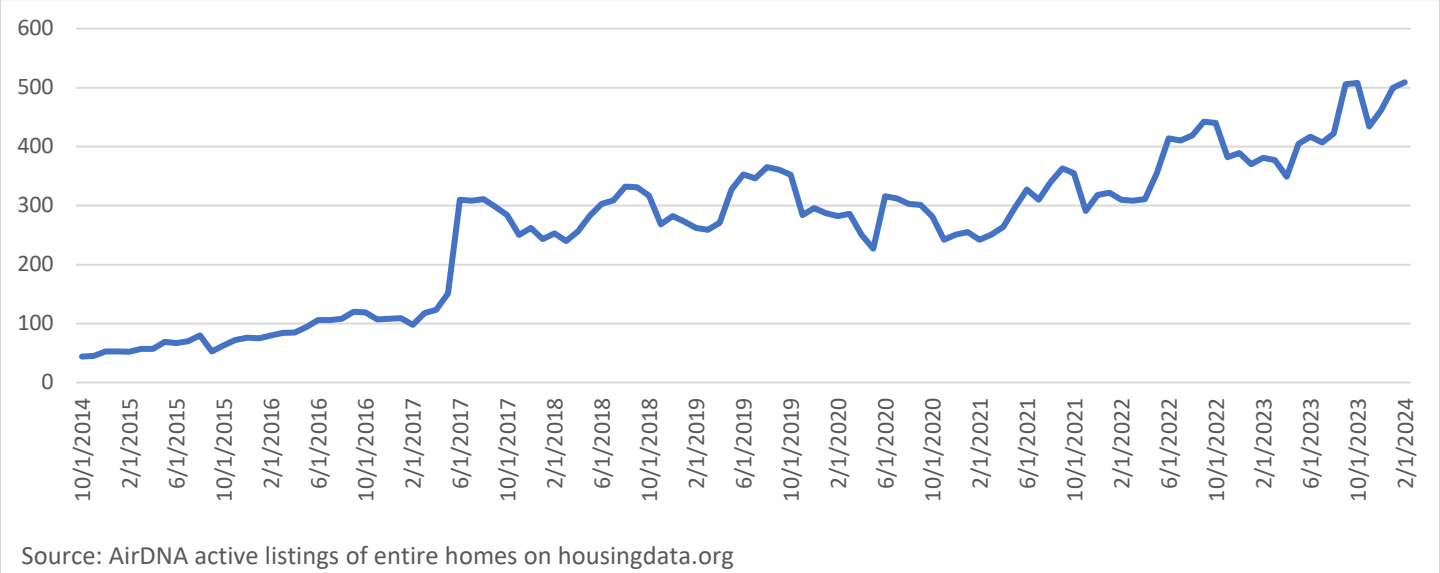


Source: Analysis of AirDNA short-term rental data from housingdata.org

Orleans County has followed this trend in the STR market with a steady annual increase in the number of units. In 2023, 506 homes were listed as STRs, representing more than 3% of the county's total housing stock, in line with the state rate of 4%.

Troy, near the Jay Peak ski resort, had the greatest portion of their housing stock dedicated to Short-term Rentals with 20% and contains about a third of the STRs in the county.

Figure 20-7: Orleans County short-term rental homes



Source: AirDNA active listings of entire homes on housingdata.org

Figure 20-8 Seasonal homes and short-term rentals by town

Location	Seasonal homes (2022)	Seasonal homes relative to total housing stock	Short-term rentals (active Oct. 2023)	Short-term rentals relative to total housing stock	Total housing stock
Orleans County	**4,081**	**25%**	**506**	**3.10%**	**16,499**
Albany	78	15%	3	0.60%	515
Barton	234	15%	89	5.50%	1,606
Brownington	74	14%	0	0.00%	535
Charleston	143	24%	23	3.90%	591
Coventry	9	2%	0	0.00%	441
Craftsbury	115	18%	15	2.30%	645
Derby	479	19%	24	1.00%	2,478
Glover	282	38%	39	5.30%	734
Greensboro	427	58%	32	4.30%	736
Holland	121	25%	0	0.00%	477
Irasburg	30	6%	12	2.20%	539
Jay	546	65%	0	0.00%	841
Lowell	168	30%	11	1.90%	568
Morgan	433	52%	26	3.10%	831
Newport City	247	10%	16	0.70%	2,383
Newport Town	84	10%	51	5.90%	867
Troy	95	12%	154	19.70%	783
Westfield	95	31%	11	3.60%	302
Westmore	421	67%	0	0.00%	627

Source: U.S. Census Bureau, American Community Survey 2018-2022 estimates and AirDNA active listings of entire homes on housingdata.org

Characteristics of Housing Stock

The types of homes that make up the housing stock in Orleans County are similar to the state as a whole. Orleans County's stock consists primarily of single-family detached homes. 77% of the combined year-round owner and renter housing stock are single-family detached homes, even greater than the proportion statewide (67%).

Figure 20-9: Orleans County owner homes types

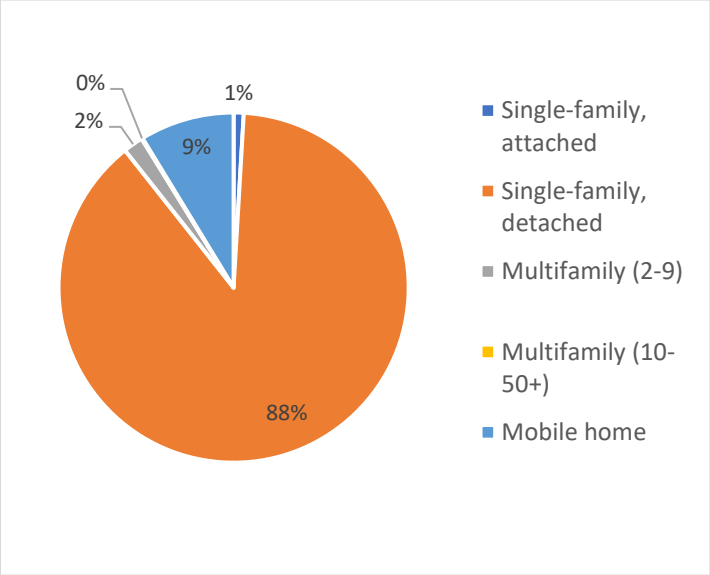
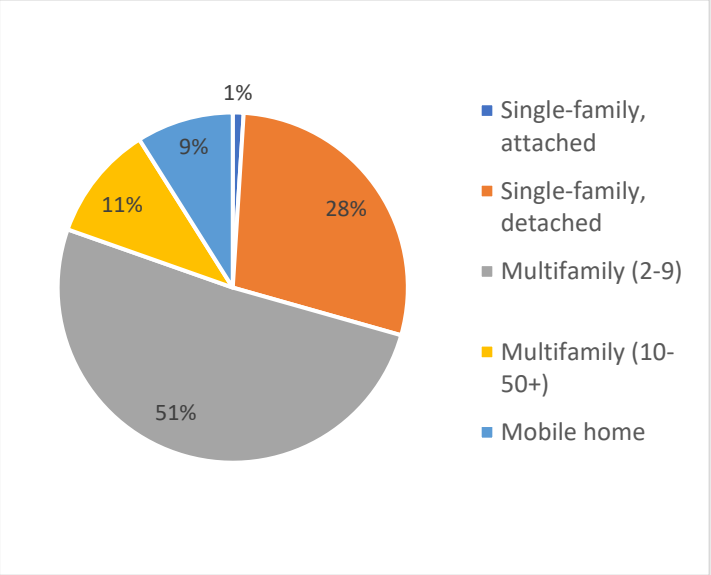


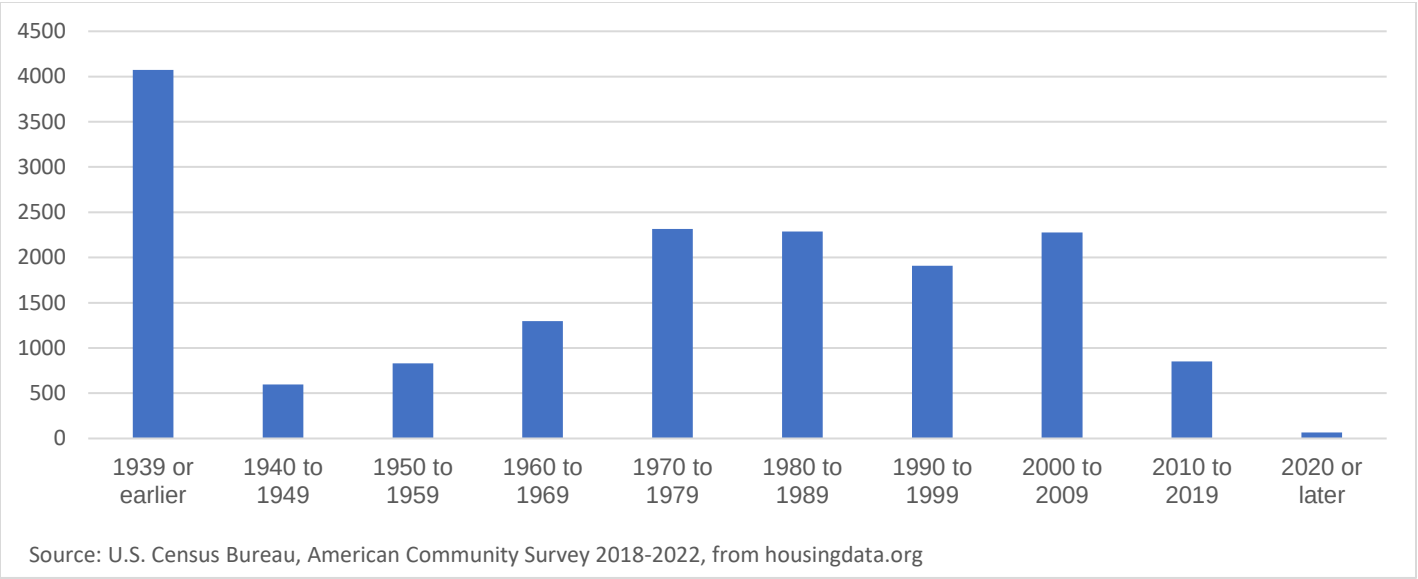
Figure 20-10: Orleans County renter homes types



Source: U.S. Census Bureau, American Community Survey 5-year estimates 2022 from housingdata.org.

Of all homes in Orleans County, an estimated 25% were built prior to 1940, a lesser proportion than the statewide average of 25%. The median home in the county was built in 1976. Although not necessarily indicative of housing quality problems, an older home is likely to elevate home maintenance and heating costs for its occupant.

Figure 20-11: Year built for Orleans County homes



Source: U.S. Census Bureau, American Community Survey 2018-2022, from housingdata.org

In Vermont, the average household size has decreased over the past 30 years, down from 2.57 people per household in 1990 to 2.27 people per household in 2020. This decline has created a mismatch between the number of people per household and the number of bedrooms in Vermont homes. This difference is most pronounced in owner-occupied housing where large homes of 3+ bedrooms (74% of owner homes) outnumber of large households of 3+ people (32% of owner households). The difference in household size and number of bedrooms is not as pronounced within the renter housing market.

The mismatch is present in Orleans County as well, where large homes (62% of the county's year-round homes) far outnumber large households (30% of the county's year-round households). Conversely, single person households (29% of the county's year-round households) outnumber small homes of 0-1 bedrooms (12% of the county's year-round homes).

Figure 20-12 Household size, 2022

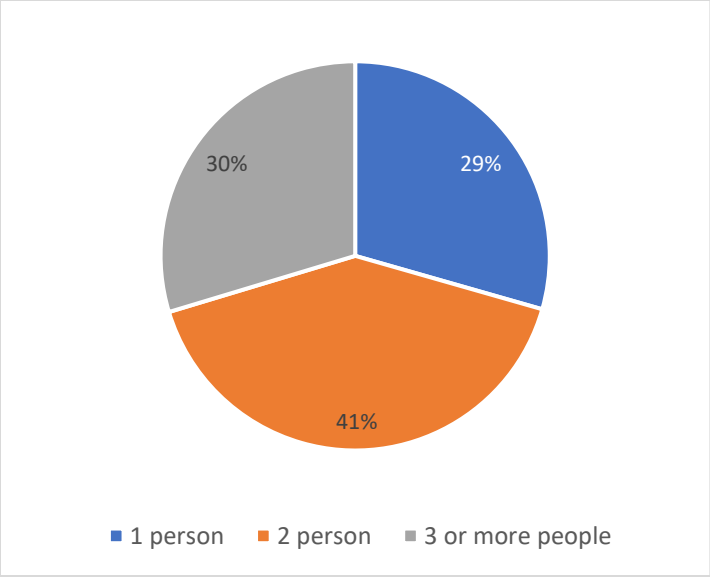
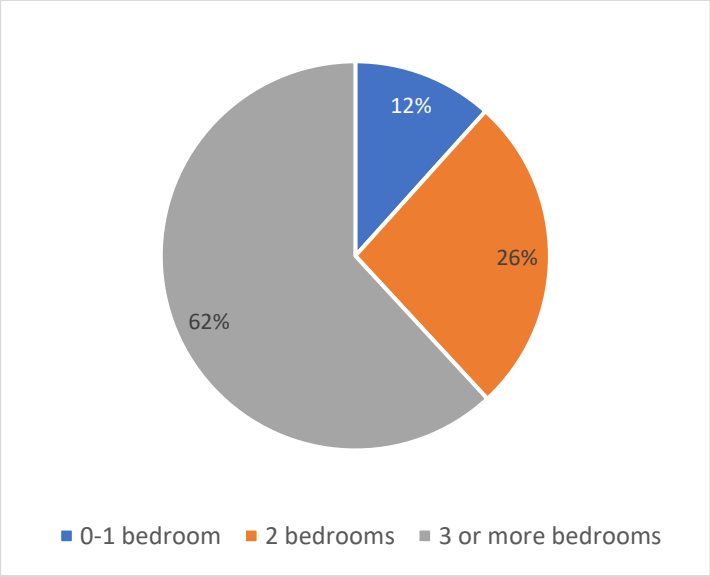


Figure 20-13 Homes by number of bedrooms, 2022



Source: U.S. Census Bureau, American Community Survey 5-year estimates 2022 from housingdata.org.

Manufactured Homes and Mobile Home Parks

There are approximately 1,352 manufactured homes in Orleans County. These include homes used by year-round homeowners and renters as well as homes used seasonally or occasionally and vacant. Manufactured homes make up 8% of the county housing stock, more than the state average rate of 5%, according to the U.S. Census Bureau's 2018-2022 American Community Survey.

Some manufactured homes in Orleans County are located in manufactured home communities, also known as mobile home parks. Orleans County has 6 mobile home parks with 215 lots. As of November 2023, there were 5 vacant lots in the county, resulting in a 2.3% park vacancy rate. No Orleans parks have been found to be located in floodways or floodplains. There is at least one park in Orleans County that has major capital improvement needs which will cost somewhere between $200,000 and $300,000

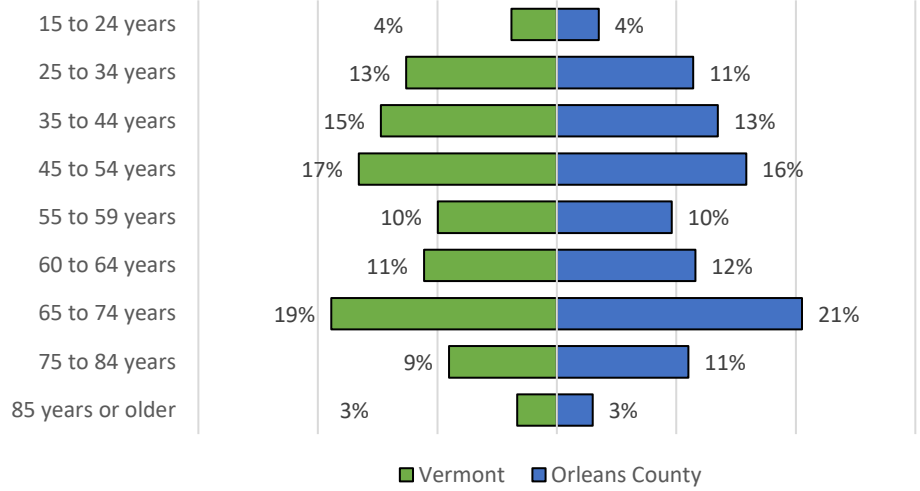
Figure 20-14 Orleans County mobile home parks

Park Ownership type	Parks	Lots
For Profit	3	54
Non-profit	2	150
Cooperative	0	0
All Rental (for profit)	1	11
Total	6	215
Median lot rent		$406
Source: Vermont Mobile Home Park Registry		

Household Demographics

Orleans County households are more likely to be headed by someone aged 65 or older (35% of all year-round households) than the statewide average rate of 31%. Similarly, households headed by someone under 35 years old make up 15% of the county's residents, compared to 17% statewide.

Figure 20-15 Households by age of householder, 2022



Source: U.S. Census Bureau, American Community Survey, 5-year estimates, 2018-2022

Age range	Households
15 to 24 years	404
25 to 34 years	1316
35 to 44 years	1554
45 to 54 years	1827
55 to 59 years	1110
60 to 64 years	1336
65 to 74 years	2365
75 to 84 years	1270
85 years or older	346
Total	11,528

The vast majority of household heads living in the county identify as white alone, but the number of those identifying as people of color increased between 2010 and 2020 while the number identifying as white alone decreased.

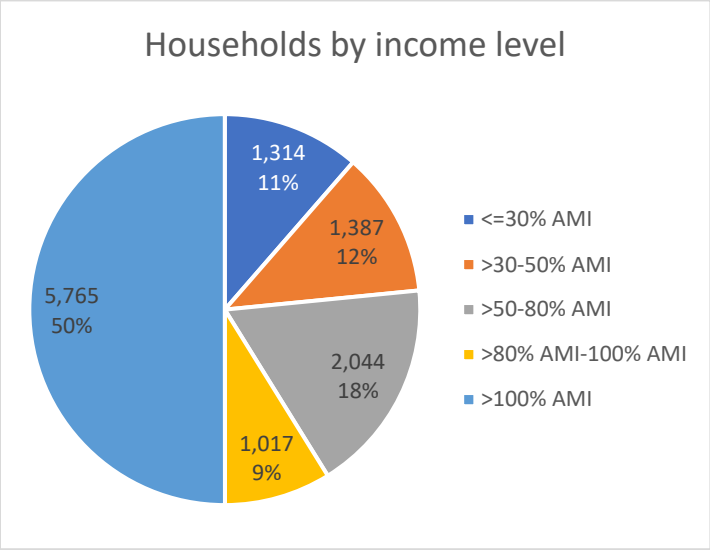
Figure 20-16 Households by race and tenure, 2010-2022

Orleans County	All households			Owner households			Renter households		
	2010	**2020**	**2022***	**2010**	**2020**	**2022***	**2010**	**2020**	**2022***
American Indian and Alaska Native alone	52	78	52	28	41	39	24	37	13
Asian alone	24	40		14	25		10	15	
Black or African American alone	25	27		14	17		11	10	
Native Hawaiian and Other Pacific Islander alone	1	6		-	1		1	5	
Some Other Race alone	23	54		10	26		13	28	
Two or More Races	146	495	322	94	295	220	52	200	102
White alone	11,049	10,998	11,067	8,393	8,394	8,894	2,656	2,604	2,173
Grand Total	11,320	11,698	11,528	8,553	8,799	9,228	2,767	2,899	2,300

Source: U.S. Census Bureau Decennial Census and American Community Survey 2018-2022 estimates (Table B25003A-G) from housingdata.org. *Note: Estimates for small groups are not available ("n/a") for 2022 because they are based on samples with large margins of error.

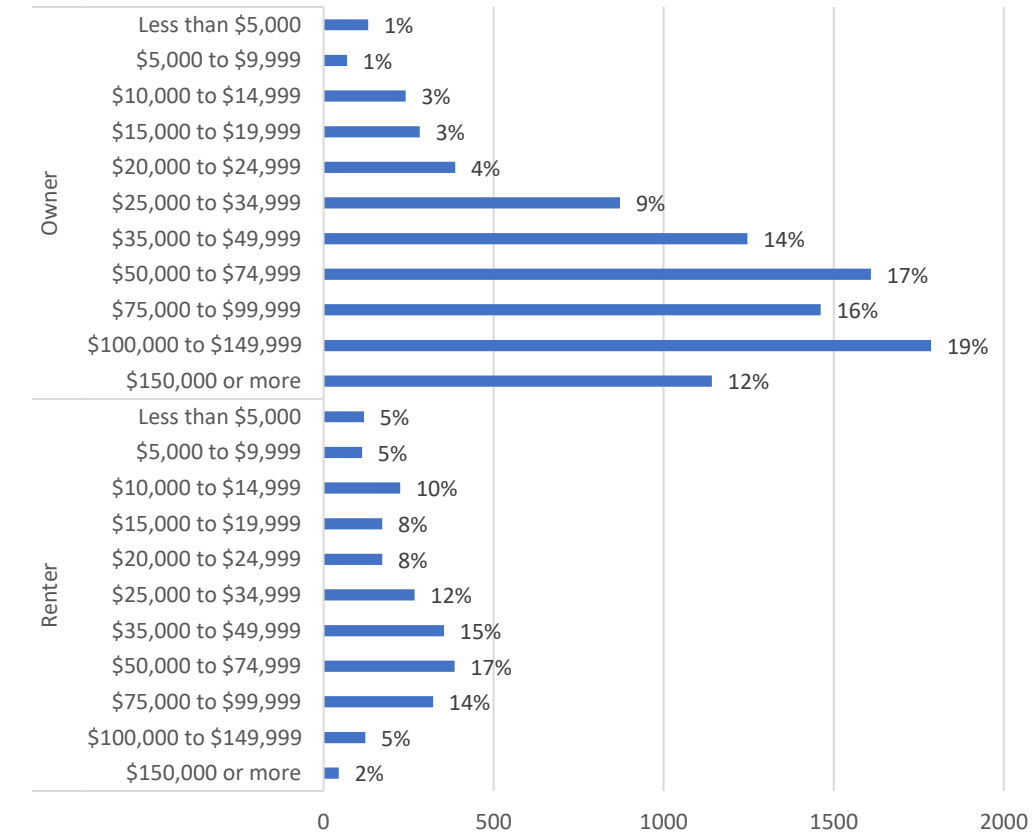
The estimated median household income in Orleans County was $63,981 in 2022. About 23% of county households have very low incomes of 50% of the Area Median Income (AMI) or less.

Figure 20-17 Household income relative to Area Median Income (AMI)



County income levels	
30% AMI	$20,943
50% AMI	$31,991
80% AMI	$51,185
Area Median Income (100%)	$63,981
Owner household median	$72,111
Renter household median	$37,297
Source: Based on U.S. Census Bureau, American Community Survey 2018-2022 from housingdata.org	

Figure 20-18 Number of households by income by tenure, 2022

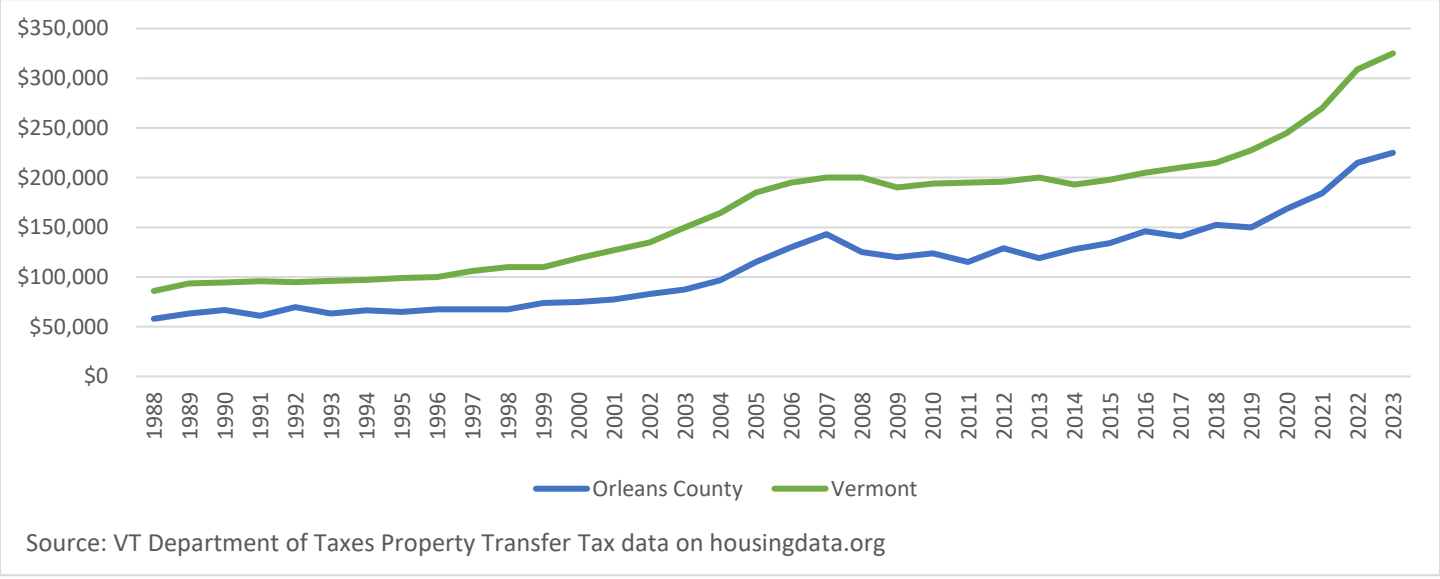


Source: U.S. Census Bureau, American Community Survey, 5-year estimates, 2018-2022

Homeownership Market

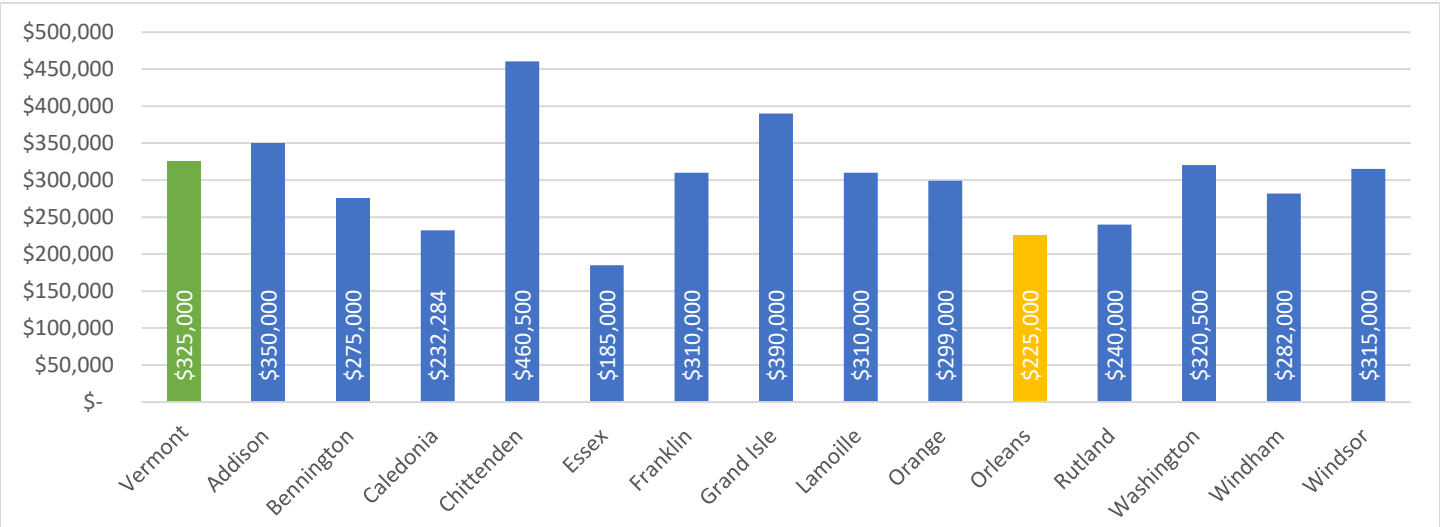
There are approximately 9,000 homeowner households in Orleans County. An estimated 80% of the county's households are homeowners, compared to a statewide rate of 73%. The median home price in the county in 2023 was about $225,000, while the state median was $325,000. This continues a trend in which no county in Vermont has seen a decline in annual median home sale price since 2019.

Figure 20-19: Median home prices



Source: VT Department of Taxes Property Transfer Tax data on housingdata.org

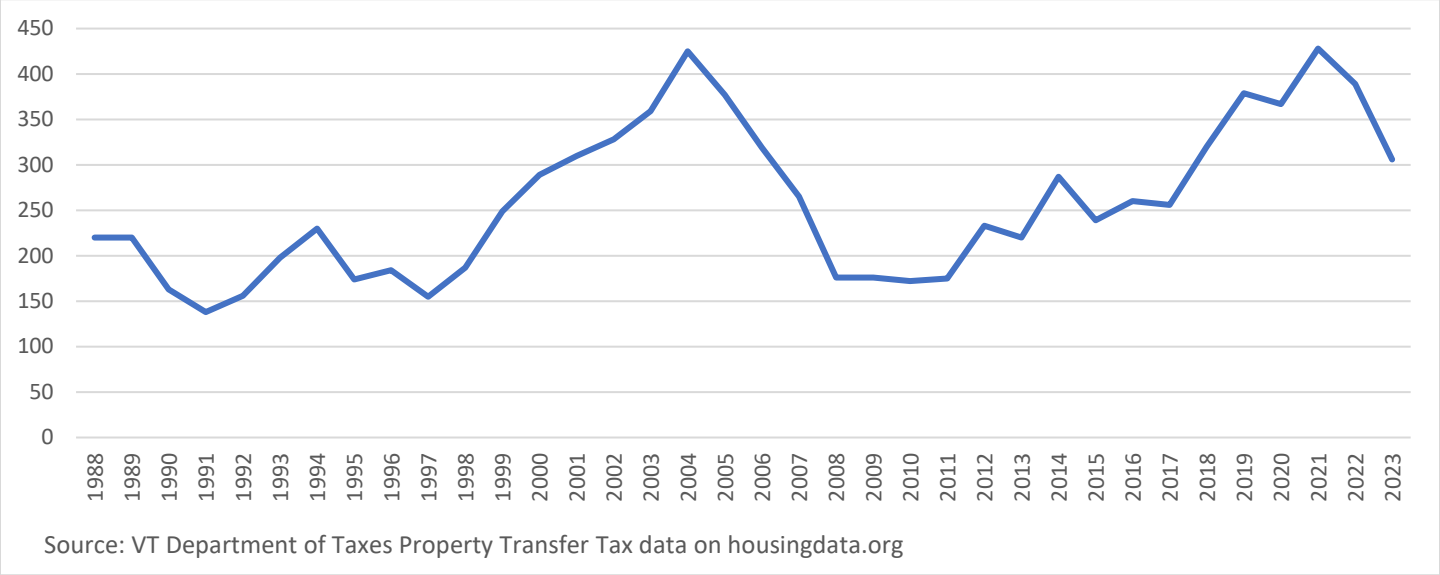
Figure 20-20 Median gross rent by county, 2022



Source: VT Department of Taxes Property Transfer Tax data on housingdata.org

In 2023, there were 306 primary homes sales in Orleans County. The annual total number of homes sold in the county peaked in 2021 when 428 homes were sold. This reflects the statewide increase in primary home sales experienced in 2020 and 2021. The decline in sales in 2021-2023 suggests that rising prices and interest rates, as well as constrained supply of for sale homes, may be slowing down the home sale market.

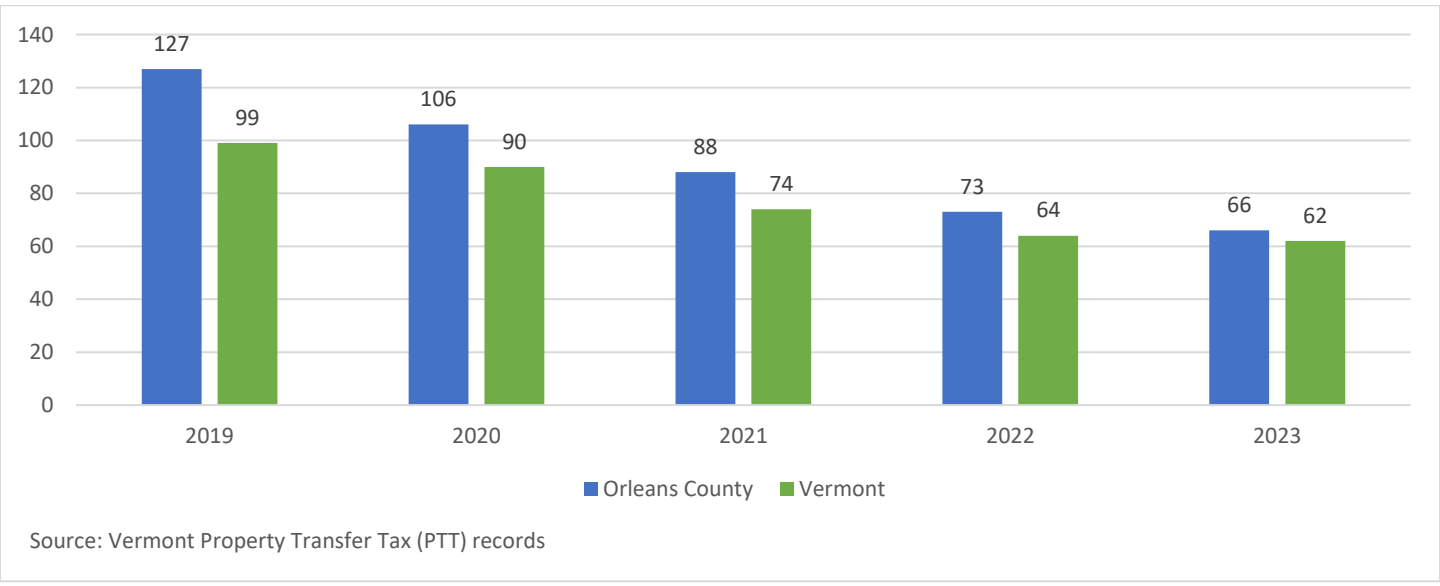
Figure 20-21 Number of primary home sales in Orleans County, 1988-2023



Source: VT Department of Taxes Property Transfer Tax data on housingdata.org

The median days on the market for an Orleans County home dropped to 66 days in 2023 from 127 days in 2019. Homes in the county stay on the market slightly longer than the Vermont median of 62 days. On average, homes in the county are on the market for approximately two fewer months than in 2019. The short time on the market is an all-time low in Vermont and another indication of the high demand for homes.

Figure 20-22: Median days on market

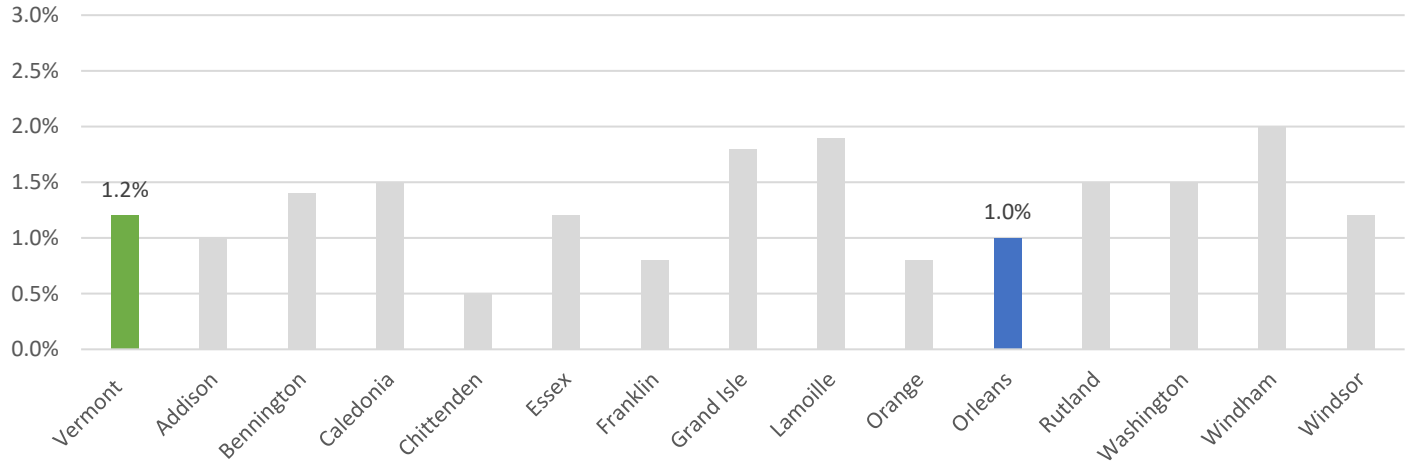


Source: Vermont Property Transfer Tax (PTT) records

The homeowner vacancy rate is the number of homes on the market compared to the total number of homes used or intended for homeowner households. Vermont's homeowner vacancy rate is estimated at 1.2%, below the 2.0% rate considered indicative of a healthy housing market. When the vacancy rate falls below the healthy rate, it can be difficult for homebuyers to find homes to purchase due to limited availability and puts upward pressure on sales prices.

Vacancy rates vary between Vermont counties, with some counties falling in the healthy market range and others far below. The homeowner vacancy rate in Orleans County (1.0%) is lower than both the statewide rate and the healthy market range.

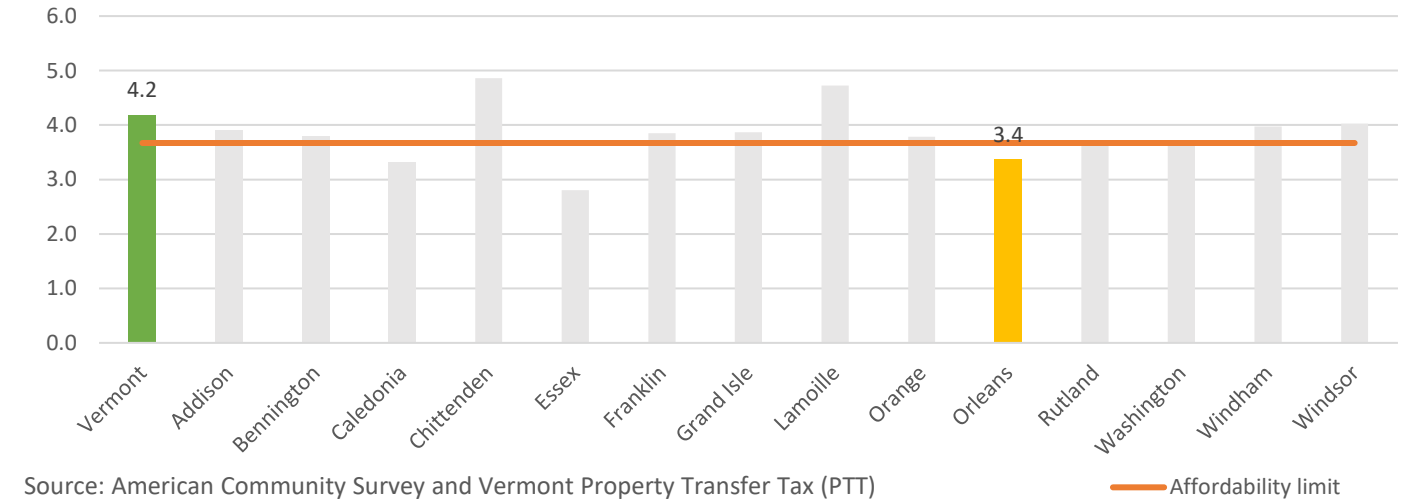
Figure 20-23: Homeowner vacancy rates



Source: VHFA analysis of estimates of U.S. Census Bureau: American Community Survey 5-year estimates, 2018-2022 from housingdata.org

Homes are more affordable in Orleans County, on average, than in most Vermont counties. In 2022, the ratio of county home prices to median county household income was 3.4. When exceeding a factor of 3.67, households on average are paying more than 30% of their annual income towards housing costs and are thus considered cost burdened. An estimated 26% of owner-occupied households in Orleans County are cost-burdened.

Figure 20-24 Ratio of median home sale price to county median household income, 2022

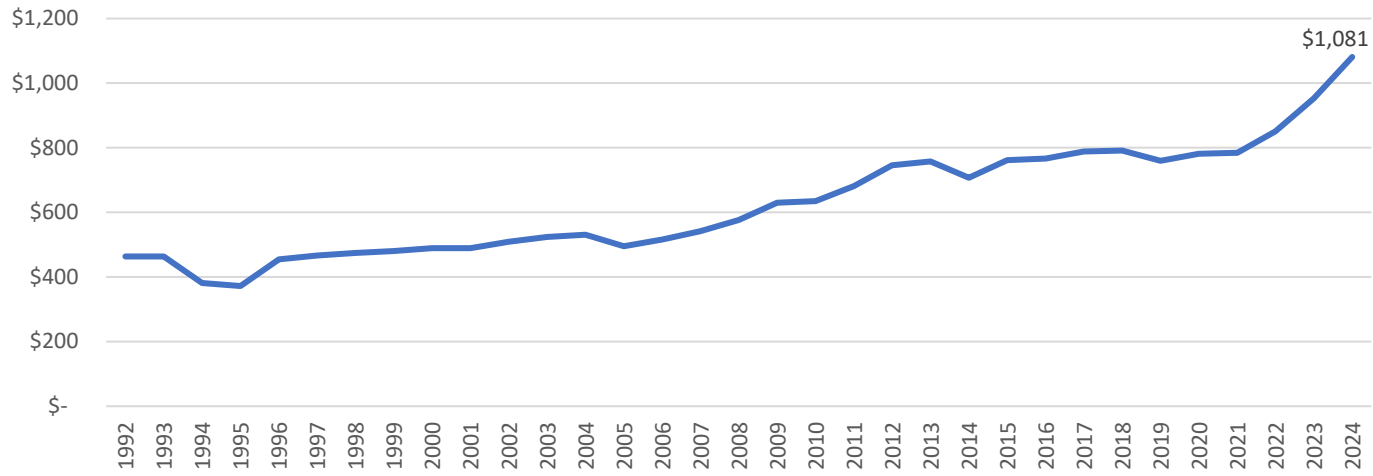


Source: American Community Survey and Vermont Property Transfer Tax (PTT)

Rental Housing Market

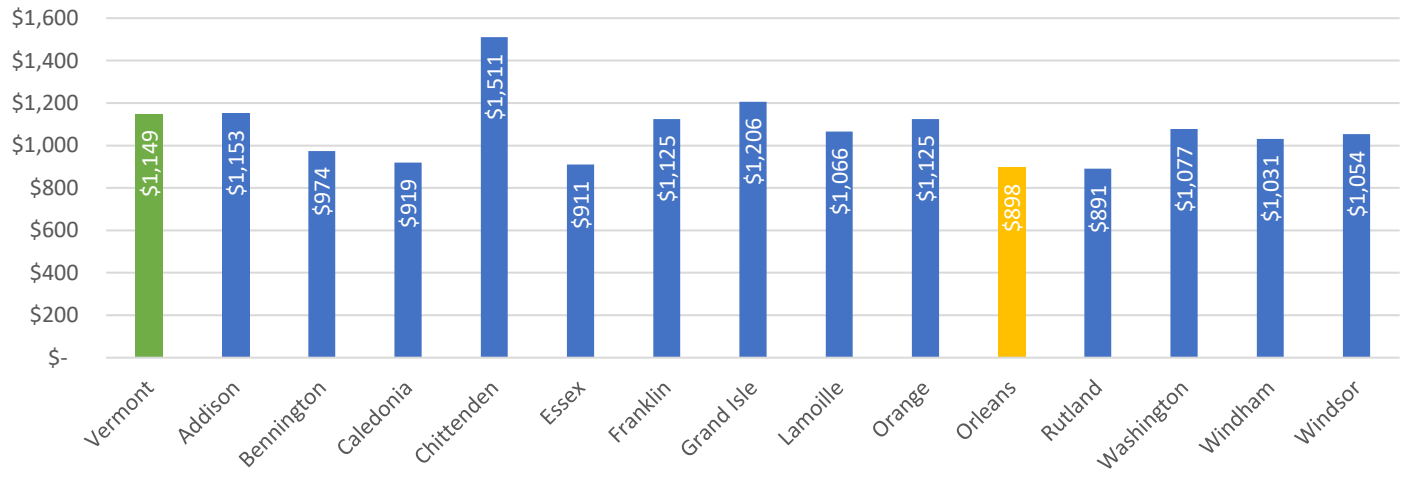
According to HUD, monthly rent for a safe, decent apartment in Vermont counties in 2024 is 25-35% higher than it was 5 years ago.[12] The fair market rent for a 2-bedroom apartment in Orleans County was set at $1,081 in 2024. The median rent in Orleans County of $898 was lower than the statewide median of $1,149 in 2022.

Figure 20-25: Fair market rent for a 2-bedroom apartment



Source: U.S. Department of Housing and Urban Development estimated 40th percentile rent for a decent quality apartment on housingdata.org

Figure 20-26: Median gross rent by county, 2022

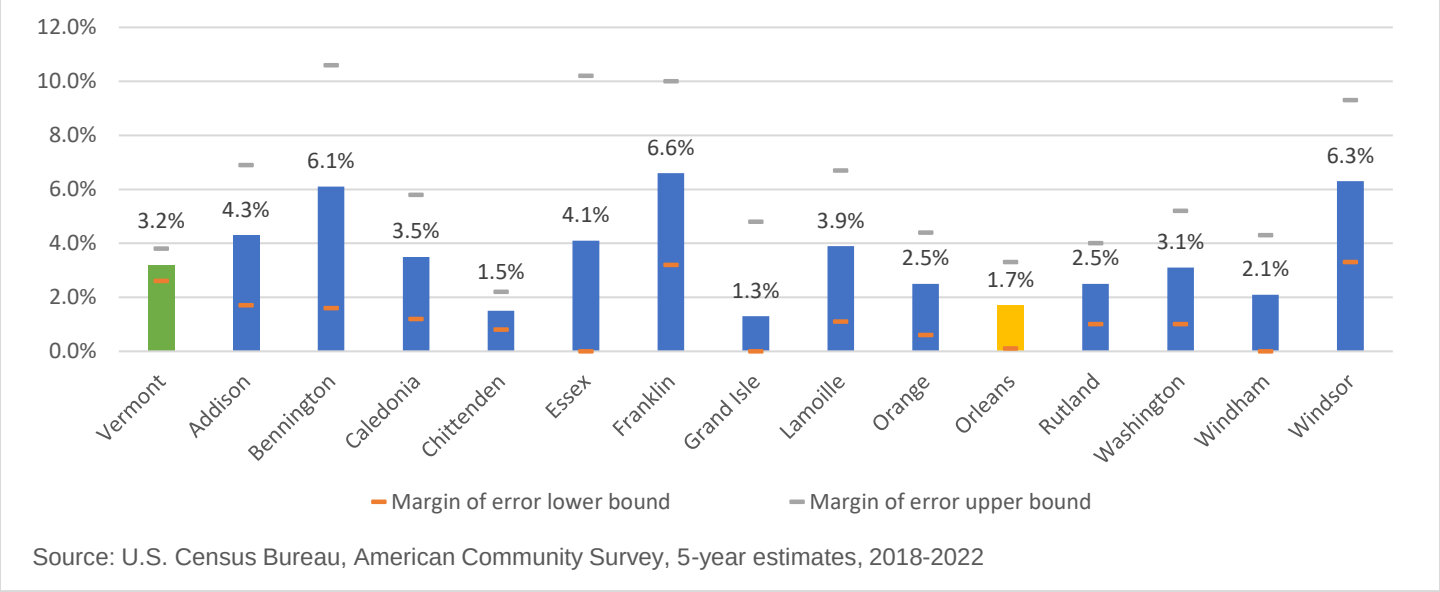


Source: U.S. Census Bureau, American Community Survey, 5-year estimates, 2018-2022

[12] U.S. Dept. of Housing and Urban Development, HUD Fair Market and 50th Percentile Rents. 2024

The renter vacancy rate is the number of homes for rent compared to the total number of homes used or intended for renter households. According to the most recent estimates available, Vermont's rental vacancy rate is 3.2%. This is somewhat lower than what experts consider to be a healthy vacancy rate, which is typically around 4 to 6%. Below that rate, renters can have difficulty finding an affordable home, putting upward pressure on prices. Orleans County had a rental vacancy rate of 1.7% in 2022 – lower than the statewide rate, but with a larger margin of error. Both state and county vacancy rates have declined in the last ten years.

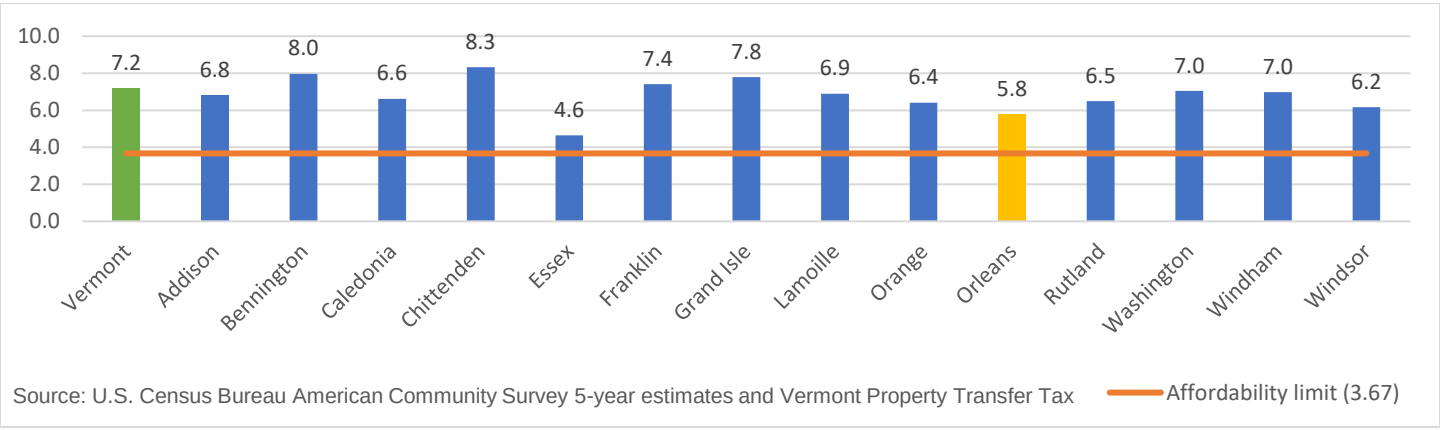
Figure 20-27: Rental vacancy rates, 2022



Source: U.S. Census Bureau, American Community Survey, 5-year estimates, 2018-2022

Across the state, the median home sale price was 7.2 times the median renter household income in 2022. For housing to be considered affordable, housing costs should not exceed a factor of 3.67, where only 30% of income is dedicated to housing costs. Given the mismatch in this ratio, the median renter household would have difficulty affording a median primary home statewide and in Orleans County.

Figure 20-28 Median home sale price to median renter income ratio, 2022



Source: U.S. Census Bureau American Community Survey 5-year estimates and Vermont Property Transfer Tax

Subsidized Rental Housing

Vermont has 14,670 rental apartments in 541 apartment complexes that were built through federal and state government programs. Together, these homes comprise 19% of the state's rental homes.

Affordable housing is generally defined as housing where the occupant is paying less than 30% of their income towards housing costs. To create affordable housing, the federal government directs funding through various channels, including state governments, non-profit or private housing developers, Public Housing Authorities (PHAs) or other housing agencies. Public subsidies for affordable housing largely fall in two categories; (1) funding for the construction and rehabilitation of housing, or (2) funding to provide rental assistance to tenants. Often, apartments created with public development funding are paired with rental assistance funding to ensure affordability for low-income tenants

Figure 20-29 Rental housing with project-based assistance in Vermont by county, 2024

County	Total occupied rental homes	Apartments in buildings developed with public funding	% of all rental homes	Apartments with monthly project based rental assistance	% of all rental homes
Addison County	3,183	507	16%	279	9%
Bennington County	4,222	836	20%	400	9%
Caledonia County	3,056	528	17%	231	8%
Chittenden County	26,034	5,302	20%	1,929	7%
Essex County	468	100	21%	70	15%
Franklin County	4,604	787	17%	498	11%
Grand Isle County	315	99	31%	37	12%
Lamoille County	3,150	396	13%	189	6%
Orange County	2,317	430	19%	223	10%
Orleans County	2,398	335	14%	187	8%
Rutland County	7,304	1,371	19%	880	12%
Washington County	7,247	1,311	18%	903	12%
Windham County	5,655	1,417	25%	707	13%
Windsor County	6,309	1,251	20%	749	12%
Statewide	76,262	14,670	19%	7,282	10%

Source: U.S. Census Bureau, American Community Survey 5-year estimates and Directory of Affordable Rental Housing on housingdata.org

In Orleans County, there are 335 apartments in buildings that were built with public development subsidies. These apartments account for 14% of the county rental housing stock. Among those apartments, 187 are connected to a source of project based rental assistance, such that tenants pay no more than 30% of their gross income towards housing costs, with the rental assistance administrating agency covering the remaining rent balance directly.

Because Orange County does not have an associated Public Housing Authority to administer certain federal housing programs or locally disperse Section 8 Housing Choice Vouchers, this is done by Vermont State Housing Authority.

Households With Housing Problems

The U.S. Department of Housing and Urban Development (HUD) receives custom tabulations from the Census Bureau American Community Survey (ACS). These data, known as the "CHAS" data (Comprehensive Housing Affordability Strategy), demonstrate the extent of housing problems and housing needs, particularly for low income households. The CHAS identifies four housing problems:

1. Home lacks complete plumbing,

2. Home lacks complete kitchen,

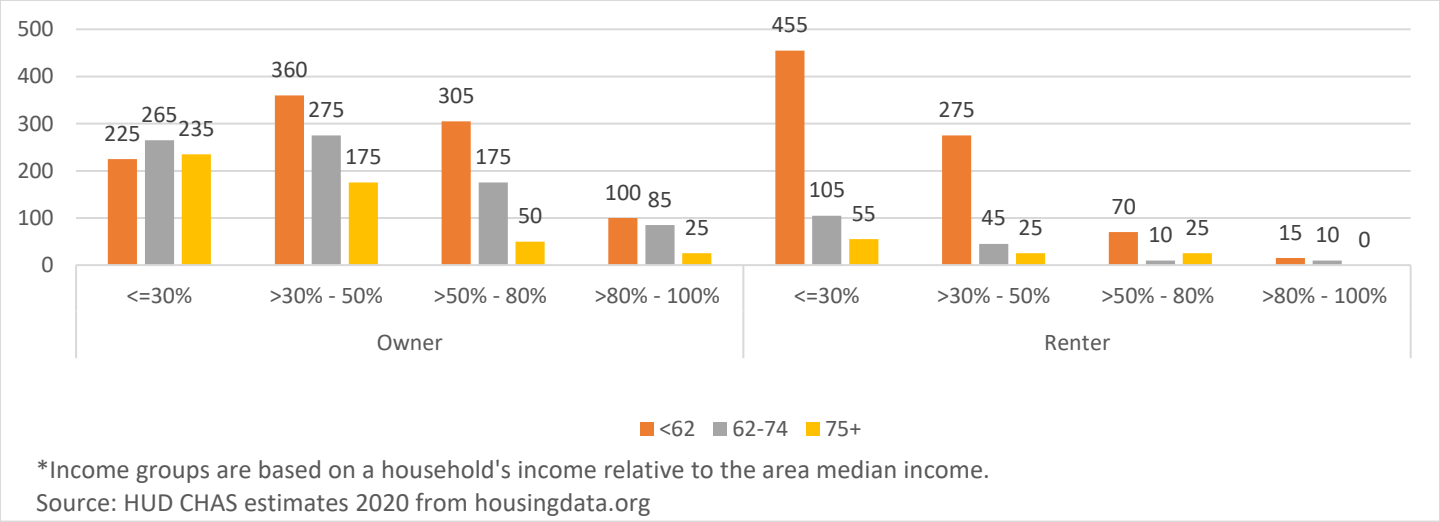
3. Household is overcrowded, or

4. Household is cost burdened (paying more than 30% of income towards housing)

An estimated 83,180 households in Vermont (about 33% of the households in the state) have at least 1 housing problem. Among these potential issues, cost burden is the most prevalent, accounting for at least 95% of the households with one or more housing problem.

The single largest demographic group in Orleans County experiencing housing problems is renters with household incomes of less than 30% of the area median who are younger than 62. According to HUD Comprehensive Housing Affordability Strategy estimates, 455 of these households had at least one of the following housing problems: housing costs of 30% or more of income, lack of kitchen or plumbing facilities, and overcrowding.

Figure 20-30: Orleans County households with housing problems, by income group*



*Income groups are based on a household's income relative to the area median income.
Source: HUD CHAS estimates 2020 from housingdata.org

Potential Housing Quality Issues

The Census Bureau offers only minimal estimates of the extent to which Vermont's housing stock conforms to basic quality standards:

- 2,321 occupied housing units, or 0.6% of Vermont's housing stock lack complete kitchen facilities.
- 1,322 occupied housing units, or 0.4% of Vermont's housing stock lack complete plumbing facilities.
- 498 occupied housing units, or 0.3% of Vermont's housing stock are unheated and 510 use coal as a main heating source.
- 4,230 occupied homes, or 2% of the housing stock, are overcrowded
- 4,600 occupied mobile homes were built before 1979 when federal quality standards were enacted

However, the Public Use Microdata Sample (PUMS) for the American Community Survey (ACS) allows for multi-factor analysis, making it possible to review combined criteria that signal possible housing quality issues. Households were flagged with potential quality issues if they had any of the following criteria:

- The heating fuel type was coal, or the home lacked a heat source.
- The housing unit lacked complete kitchen facilities.
- The housing unit lacked complete plumbing facilities.
- The housing unit was a mobile home built before 1979.
- The housing unit was a rental unit built before 1939 with rent less than $500 per month.
- The housing unit was an owner home with an estimated property value of $75,000 or less (excluding mobile homes or RVs/vans/boats).

Based on analysis of Census Bureau PUMS 2022 data, there are at least 19,637 Vermont households living in homes with potentially serious housing quality issues. This accounts for about 7% of the occupied housing stock. This estimate almost certainly undercounts the total number of households with housing problems because many issues such as poor sanitary conditions, inadequate weatherization and poor interior air quality would not necessarily be reflected in the criteria above.

PUMS data is not available at the county level, instead grouping counties geographically. Essex County is classified as part of the Northern Vermont PUMs region and represents 21% of the housing stock in the region. If the distribution of housing quality issues is equal across the region, there are likely approximately 1,082 owner occupied and 200 renter occupied homes in County with these indicators.

Figure 20-31 Occupied households with potential housing quality issues, 2022

Region	Owner households	Renter households	Occupied without payment of rent	Total households
Northern Vermont (Caledonia, Essex, Franklin, Grand Isle, Lamoille & Orleans Counties)	5,151	953	526	6,630
Statewide	14,101	4,517	1,055	19,673
Source: U.S. Census Bureau Public Use Microdata Samples (PUMS), 5-year estimates, 2018-2022				

This analysis does not account for vacant units – an additional 445 homes in the county are considered “other vacant” by the U.S. Census Bureau. Homes can fall into this category for many reasons, including homes that are under renovation or homes held vacant for personal reasons by the owner. However, since this category can also include foreclosed or abandoned homes, it is often used as an indicator of area housing stock decline.

Overcrowding

About 4,200 (or 2%) of Vermont households live in overcrowded homes. Such homes are defined as those with fewer rooms than household members. For example, a one-bedroom home with a living room and kitchen has 3 rooms. Thus, it would be considered overcrowded if the household had 4 members. Studies have reported a direct association between crowding and adverse health outcomes, such as infectious disease and mental health problems.

In Vermont, renter households experience overcrowding at over three times the rate of homeowners, with 3.4% of renter households overcrowded versus just under 1% of owner households.

There are an estimated 166 households in Orleans County that are considered overcrowded. Of those households, 113 are owner-occupied and 53 are renter-occupied. Among all overcrowding in Orleans County, an estimated 55 households are considered severely overcrowded.

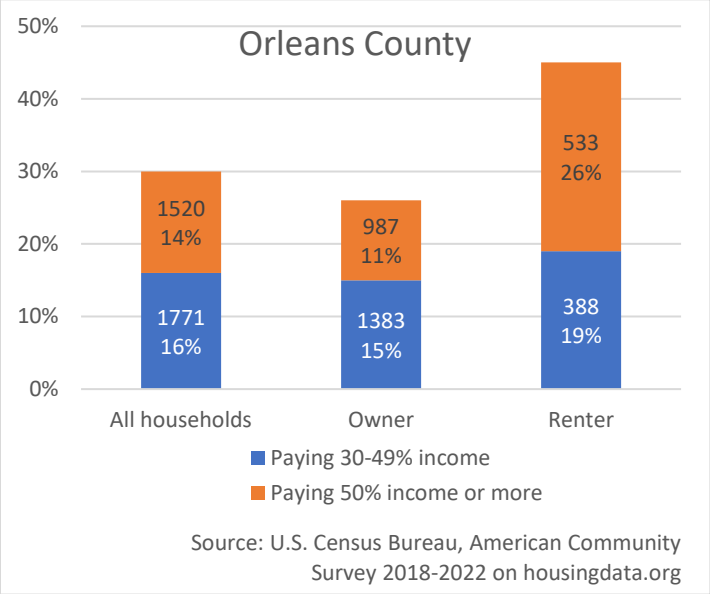
Cost Burden

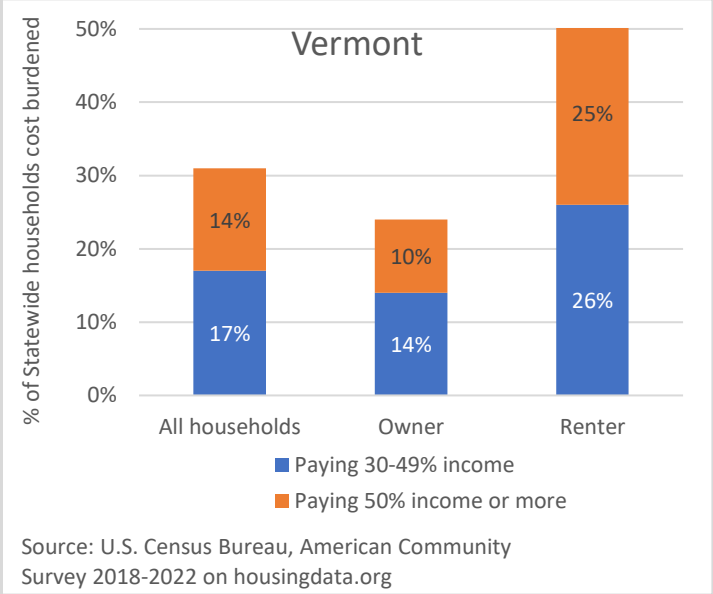
When a household's housing expenses consume less than 30% of their monthly income, their housing is considered "affordable" because there is likely to be enough income remaining to afford other necessities. When housing costs consume more than 30% of household income, the household is considered "cost burdened." When cost burdened, households are less likely to have enough income remaining for other living expenses which can lead to housing instability. When housing costs exceed 50% of household income, the household is considered to be "severely cost burdened."

Approximately 31% of all households in Vermont are cost burdened (about 82,000 households), of which 36,000 households, 14% of all households, are severely cost burdened. In Vermont, the total number of cost burdened owner-occupied households (about 48,000) is greater than the number of cost burdened renter households (about 34,000 households), but the percentage of all owner households that are cost burdened (24% of owner households) is significantly lower than the percentage of renter households cost burdened (51% of renter households). 10% of Vermont's homeowners (about 20,000 households) and 26% of Vermont's renter households (about 17,000 households) are "severely cost burdened."

The proportion of owner households that are cost-burdened in Orleans County is in line with the state (25%), but renter cost burden is significantly less common than the state (45%). Approximately 1,520 households are severely cost-burdened in Orleans County and may be at risk of housing instability.

Figure 20-32: Cost burden among Orleans County households compared to statewide cost burden



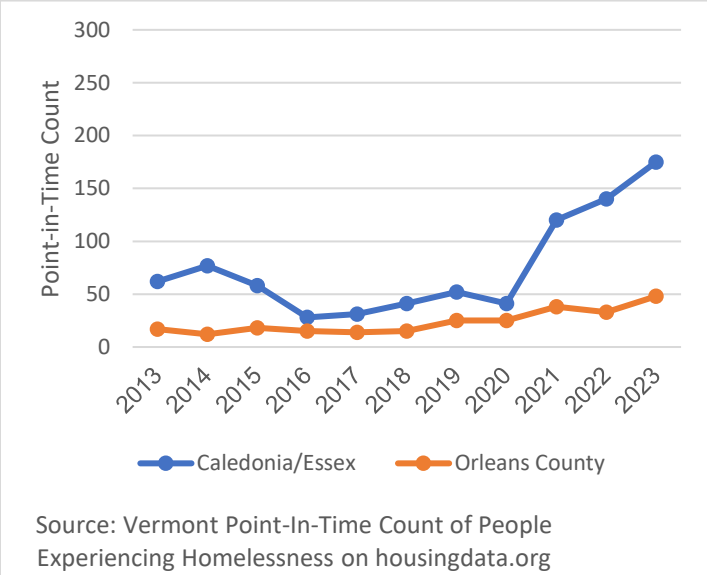


Homelessness

Homelessness services in the Northeast Kingdom are divided between two local Continua of Care (CoC): the Caledonia/Essex CoC and the Orleans CoC. The Orleans CoC covers all of Orleans County except for Craftsbury and Greensboro, as well as the Essex county towns of Bloomfield, Brighton, Brunswick, Canaan, Maidstone, and Norton. The Caledonia-Essex CoC covers the remainder of the Northeast Kingdom.

During the most recent 2023 Point-In-Time count, 48 people in 25 households were experiencing homelessness in the Orleans CoC. This represents the highest total in the county since the PIT count began. Vermont's Coordinated Entry Dashboard provides the number of individuals experiencing homelessness on a weekly basis who are accessing services from Vermont's housing support agencies. During the last week in January 2024, 112 people in the Orleans CoC area received support through this area's continuum of care.

Figure 20-33: People experiencing homelessness served by the Northeast Kingdom Continua of Care



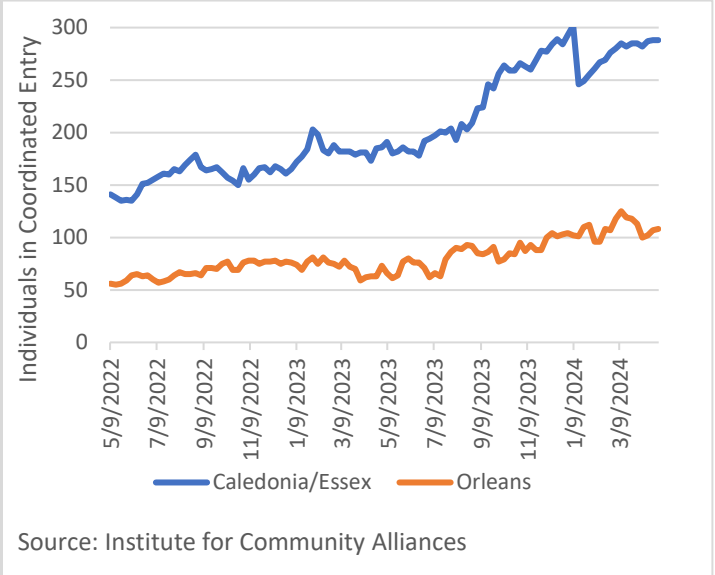


Figure 20-34: Number of people experiencing homelessness by local Continua of Care (CoCs)

Local Housing Coalition (CoC)	Number of individuals experiencing homelessness during Point-in-Time 2023	Number of individuals served by CoC during week of Jan. 29, 2024
Addison CoC	78	118
Bennington CoC	312	244
Caledonia & Essex CoC	175	255
Chittenden CoC	758	826
Franklin & Grand Isle CoC	134	242
Lamoille CoC	74	223
Orange & Windsor N CoC	188	347
Orleans CoC	48	112
Rutland CoC	654	502
Washington CoC	446	963
Windham S CoC	329	412
Windsor S & Windham N CoC	99	276
Vermont	3,295	4,408
Source: Vermont Point-in-Time Count 2023 and Vermont Coordinated Entry Dashboard		

Figure 20-35 Households experiencing homelessness and shelter availability

Local Housing Coalition (CoC)	Total Households (Point-in-Time 2023)	Households with at least one adult and child (Point-in-Time 2023)	Emergency shelter household capacity	Permanent Units with supportive services
Addison CoC	59	9	62	8
Bennington CoC	201	43	30	3
Caledonia & Essex CoC	98	26	31	29
Chittenden CoC	553	82	178	264
Franklin & Grand Isle CoC	103	9	23	6
Lamoille CoC	53	6	19	7
Orange & Windsor North CoC	132	13	0	4
Orleans CoC	25	6	4	3
Rutland CoC	425	80	19	26
Washington CoC	320	43	92	27
Windham South CoC	229	34	46	27
Windsor South & Windham North CoC	58	15	35	20
Vermont	2,256	366	539	424

Source: Vermont Point-in-Time Count, Vermont Dept. for Children and Families "GA Emergency Housing and Shelters" Presentation to the VT House Human Services and General & Housing Committees, Feb. 8, 2024 and Vermont Housing Data Website https://www.housingdata.org/profile/housing-programs/features-eligibility

Outside of the General Assistance program, emergency and transitional housing in this part of the Northeast Kingdom is extremely limited. Northeast Kingdom Community Action does operate a 3-bed facility for youth in Newport, but in general, people experiencing homeless will be redirected to Lamoille County or to St. Johnsbury in Caledonia County. The majority of Vermonters experiencing homelessness in 2021-2023 have been housed in temporary motel rooms through the General Assistance Emergency Housing program.

Recent Studies

In April 2023, Doug Kennedy Advisors completed for Rural Edge Housing and Community Development a housing needs assessment for Caledonia, Essex and Orleans counties titled "Regional Housing Study and Needs Assessment." The report identifies the following major findings regarding the region's housing needs:

Housing Stock

- Overall, the region's housing increased at a faster pace than Vermont's housing stock. It is also apparent that housing development in Orleans County accounted for most of this increase.
- Rental units account for a relatively small segment of occupied units in the study region. This reflects the region's generally rural nature and the prevalence of single family owner units in rural settings.
- Seasonal housing is a significant factor in Vermont, where 16.5 percent of total housing stock is used on a seasonal or occasional basis. The impact of vacation housing is even more pronounced in the study region, where 23.9 percent of total housing stock is used seasonally.
- Only 34 percent of the region's rental units are in small (Studio/One Bedroom) configurations.
- After reaching a low point in 2017, regional residential permits increased significantly through 2021, when 300+ permits were granted. Orleans County accounted for the great majority of new housing activity in recent years; 70 percent of all permits granted between 2015 and 2021 were located in Orleans County.
- St. Johnsbury/Lyndon combined account for 42 percent of the region's subsidized-affordable housing stock. RuralEdge is the region's primary supplier and manager of housing targeted to very low to moderate income households.

Housing Stock – Financial and Market Characteristics

- Median values for the region's owned housing stock fall well below Vermont norms. Overall, the regional median value ($170,339) is 29 percent below the statewide median ($240,600). Study region owners pay an average of 26 percent of their household income toward mortgage costs.
- Regional rents are 25 percent lower than Vermont levels. The average study region renter pays 34 percent of their household income toward rental costs. 35 percent of the region's renters pay more than 40 percent of household income toward rental costs.
- Rental vacancy rates have trended downward since 2009 at the regional and national levels. Given low rental vacancies, it is not surprising that the number of publicly listed rentals is extremely low.
- As of early 2023, there were 2,142 households on the waitlists for subsidized/affordable rental units in the region, a factor more than 3.5 households per unit. If these units were to average a 10 percent turnover rate the theoretical waiting period for the last household on the waitlist would be approximately 35 years! Clearly, demand far outstrips availability.
- An upswing in the regional for-sale market started in 2017, and was followed by strong market increases in 2020 and 2021. It appears that market totals for 2022 declined from the 2021 peak, both because of limited availability (number of listings) and increases in mortgage rates.

Housing Issues

- Housing professionals interviewed in the course of study work agreed that the regional housing shortage is not limited to one or two market components. Rather, there is a need for housing in every market segment, ranging from deeply subsidized rentals to the for-sale market for moderate income households. Moreover, the current shortage affects households in all age groups. While emphasizing the breadth of the issue, virtually all contacts noted the 'missing middle.' Contacts also noted that:
  - The most acute demand in the rental market appears to be among younger households – aged 20 to 30 years;
  - Vermont and regional demographics are resulting in major imbalances, both in the housing market and throughout the economy. In particular, rapid growth among households in upper age brackets far outweighs the rate of growth among younger households.

Housing Supply and Demand

- An analysis of the regional rental market for households with incomes up to 120 percent of the median indicated that the regional housing need over the next five years is 4,000+/- units. This is not an immediate need, as only 750+/- of the households in the targeted segment will be seeking new housing on an annual basis.
- Senior households will increase in numbers at all income levels. Growth in the number of senior households will be the dominant demographic trend in the study region.
- The analysis points to acute need for housing targeted to very low and low income housing, with a particular emphasis on young persons.
- Notably, the analysis also points to a need for true market rate rentals, as these units are in short supply.
- The region's housing development infrastructure is insufficient for the task at hand. Every regional contact pointed to a lack of building contractors with the wherewithal to take on housing development projects. For some, this situation is a product of slow growth and lack of emphasis on trades education. As several contacts noted, 'a well trained and experienced tradesperson in the region can make a far more than adequate living, yet relatively few young people are choosing to go in that direction.' There is clearly no short-term solution for this situation; however, regional leaders should look to the educational system and forge new partnerships to re-generate regional development infrastructure.
- While there are acute stress points in the housing supply and demand market, it is apparent that there is housing need at virtually all price levels. Moreover, the existing housing stock is poorly matched to an aging population dominated by small households. Housing stock efforts should be focused on both new development and revitalization of housing stock that is not attuned to market needs.
- The study region's small, more remote towns will continue to be attractive to residents seeking a truly rural lifestyle, households that seek the most affordable sources of housing and vacation home owners. However, these communities are unlikely to be the favored residence for in-migrants and local households reaching senior/retired status. These two market segments will prefer a lifestyle that includes open space, but seek locations that make it easy to shop, find services and entertainment. As such, the region's urban centers, and the communities that surround these urban centers are most likely to experience growth in coming years.