

Introduction

Information about past and current housing trends provides a basis for analyzing and planning for future housing demand and development as well as the types of housing issues that may arise in the future. These potential housing issues are addressed in the housing recommendations of this Chapter. The obligation of the Township to provide for its ‘fair share’ of a variety of housing types is also discussed in this Chapter.

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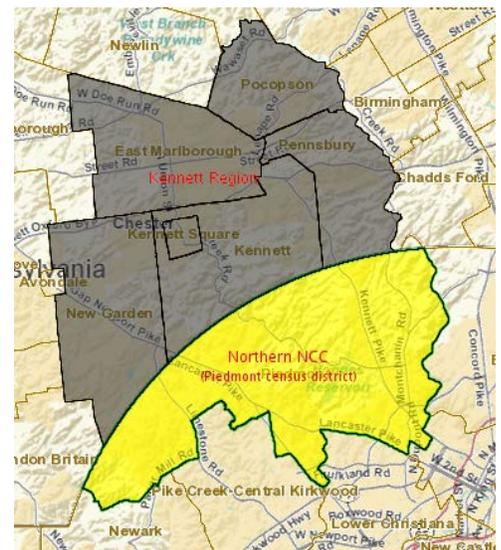


Housing Profile

Number of Housing Units

A housing unit analysis looks at existing trends in the quantity and types of housing. This information is useful for determining future housing needs for Township residents. Table 8-1 shows the number of housing units in the Township, surrounding Kennett area municipalities, and the County.

Between 2000 and 2010, there was a 24.7 percent (625 units) increase in the number of housing units in Kennett Township, as compared to 21.7 percent and 17.5 percent increases in the Kennett Region and Chester County, respectively, over the same period. Housing growth in the Township fell in the mid-range of housing growth for municipalities in the Region. Based on Chester County Assessment data, in 2012 for the Kennett Region there were 16 new units in the Township, 7 in New Garden, 20 in East Marlborough, 15 in the Borough, and none in Pennsbury or Pocopson.



Housing Projections

Housing projections provide an indication of future housing demand and potential development pressure in the Township and Kennett area. Table 8-2 shows the 2010 actual number of housing units and the projected number of units to the year 2030.

Housing unit projections use population projections based on 2010 Census data. Projected number of housing units is derived from dividing projected population growth by 2010 Census average household size (shown in parentheses in the 1st column of Table 8-2). They provide a ‘best guess’ of the number of housing units that will likely be needed over the 20-year period from 2010 to 2030. Kennett Township is expected to have an increased need for about 700 housing units (nearly a 22 percent increase). This projected Township housing need falls in the middle of the projected range for the Kennett Region, and equals the percentage change projected for the County overall.

Table 8-1: Number of Housing Units, Kennett Township and Surrounding Area

MUNICIPALITY	1990	2000	2010	CHANGE 2000-2010		SQUARE MILES [^]	2010 HOUSING DENSITY*
				NUMBER	%		
KENNETT TOWNSHIP	1,835	2,526	3,151	625	24.7%	15.3	206
NEW GARDEN	1,778	2,831	3,873	1,042	36.8%	16.1	241
EAST MARLBOROUGH	1,682	2,188	2,667	479	21.9%	15.5	172
PENNSBURY	1,141	1,438	1,550	112	7.8%	9.9	157
POCOPSON	830	890	1,189	299	33.6%	8.2	145
KENNETT SQUARE	1,984	1,967	2,084	117	5.6%	1.1	1,895
KENNETT REGION	9,250	11,840	14,514	2,674	22.6%	66.1	469
CHESTER COUNTY	139,597	163,773	192,462	28,689	17.5%	750.5	256
NORTHERN NCC DE ¹	na	11,044	11,687	643	5.5%	39.5	296
NEW CASTLE COUNTY DE	173,560	199,521	217,511	17,990	8.3%	426.3	510

Source: US Census Bureau, 1990-2010 ^ land area (does not include water area) * number of housing units per square mile of land area

Table 8-2: Projected Number of Housing Units, Kennett Township and Surrounding Area

MUNICIPALITY	2010 CENSUS	2020 PROJECTED	2030 PROJECTED	PROJECTED CHANGE 2010-2030					
				2010-2020		2020-2030		2010-2030	
KENNETT TOWNSHIP (2.50)	3,151	3,403	3,835	252	8.0%	432	12.7%	684	21.7%
NEW GARDEN (3.20)	3,873	4,279	4,977	406	10.5%	698	16.3%	1,104	28.5%
EAST MARLBOROUGH (2.69)	2,667	2,975	3,503	308	11.5%	528	17.7%	836	31.3%
PENNSBURY (2.42)	1,550	1,606	1,702	56	3.6%	96	6.0%	152	9.8%
POCOPSON (2.95)	1,189	1,649	1,814	460	38.7%	165	10.0%	625	52.6%
KENNETT SQUARE (3.05)	2,084	2,201	2,401	117	5.6%	200	9.1%	317	15.2%
KENNETT REGION (3.0)	14,514	16,113	18,232	1,599	11.0%	2,119	13.2%	3,718	25.6%
CHESTER COUNTY (2.65)	192,462	207,527	233,413	15,065	7.8%	25,886	12.5%	40,951	21.3%
NORTHERN NCC DE (2.66)*	11,687	11,687	11,909	0	0%	222	1.9%	222	1.9%
NEW CASTLE COUNTY DE (2.57)**	217,511	225,019	236,149	7,508	3.5%	11,130	4.9%	18,638	8.6%

Source: U.S. Census Bureau 2010; Delaware Valley Regional Planning Commission Population Forecasts, 2012;

* WILMAPCO, 2012 – 0% change from 2010 to 2020 may be due to oversupply of housing units whereby vacant units (725) could more than accommodate 2020 projected population; ** Delaware Population Consortium, 2012.

Projecting housing demand 20 years into the future can be difficult because of unknown factors such as the state of the economy, interest rates, and availability of land; however it provides estimates that are useful for long range planning. With the construction of one or two larger housing developments, housing projections for a given municipality can be equaled or exceeded before the end of a 10-year projection period. Because of this potential skewing by a single large development, housing projections tend to yield a more accurate estimate at the regional or county level than the municipal level. The factors discussed above should be taken into consideration when determining how frequently comprehensive plan data and recommendations should be reviewed and updated.

¹ ‘Northern NCC’ refers to a sub-county census area, Piedmont District Census County Division (CCD), which comprises the portion of northwestern New Castle County adjacent to Kennett Township. For comprehensive plan analysis purposes, this area can be compared with Kennett Region. (CCDs have no legal function and were created by the U.S. Census Bureau for statistical analysis purposes in locales with no legally established minor civil divisions (MCDs). In DE, they were first established for the 1970 census.)

Dwelling Unit Types

Table 8-3 shows housing types in Kennett Township while Table 8-4 provides a comparison with the surrounding area. There are a variety of housing types in the Township, and since 2000, there has been a significant increase in the number of multi-family units (104.9 percent). Proportionally, however, the Township remains a predominantly single-family detached community. Contributing to this also is that based on the Township existing land use analysis in Chapter 7, it appears that units categorized by census takers as ‘two-family detached’ are lots with two single-family detached units or one single-family detached unit/one accessory housing unit; and so there are actually more single-family detached ‘on the ground’ than reflected in census data.

Table 8-3: Kennett Township Housing Types¹

HOUSING UNIT TYPE	1990	2000	2006/10	CHANGE 2000 - 2006/10
SINGLE-FAMILY DETACHED	78.6%	74.8%	72.2%	15.8%
TWO-FAMILY DETACHED *	2.0%	0.9%	1.0%	31.8%
SINGLE-FAMILY ATTACHED**	7.6%	14.9%	11.2%	-9.8%
MULTI-FAMILY***	6.1%	8.1%	13.8%	104.9%
MOBILE HOME / OTHER	5.7%	1.3%	1.8%	66.7%

Source: US Census Bureau, 1990-2000, American Community Survey 5-year estimates, 2006-2010 * duplex/detached structure with 2 units one over the other ** twin/townhouse *** 3+ units in a structure, e.g. apartments, condos, quads.

Likewise, based on Township existing land use, there is more multi-family housing ‘on the ground’ than recorded in census data. This is because the Township, in following definitions under the PA MPC, places townhouses as a multi-family housing type, while twins as well as duplexes and single-family detached are not. (This distinction becomes particularly relevant for purposes of looking at the amount of multi-family housing in the Township for the fair-share analysis later in this Chapter.) As such, as of the 2014 there was just one twin structure in the Township, and thus the ‘single-family attached’ category can be assumed to be comprised nearly entirely of townhouses.

Table 8-4: Housing Types[^], Kennett Township and Surrounding Area

MUNICIPALITY	SINGLE-FAMILY DETACHED	TWO-FAMILY DETACHED	SINGLE-FAMILY ATTACHED	MULTI-FAMILY	MOBILE HOME/ OTHER
KENNETT TOWNSHIP	72.2%	1.0%	11.2%	13.8%	1.8%
NEW GARDEN	77.8%	1.3%	2.7%	11.1%	7.2%
EAST MARLBOROUGH	82.8%	1.6%	11.2%	4.3%	0.0%
PENNSBURY	66.0%	0.0%	11.8%	22.2%	0.0%
POCOPSON	87.8%	1.3%	10.3%	0.6%	0.0%
KENNETT SQUARE	47.1%	6.1%	21.0%	25.8%	0.0%
KENNETT REGION	72.3%	1.9%	11.4%	13.0%	1.5%
CHESTER COUNTY	61.7%	1.9%	17.1%	16.5%	2.7%
NORTHERN NCC DE	83.6%	0.1%	4.7%	11.3%	0.3%
NEW CASTLE COUNTY DE	54.0%	2.1%	20.4%	5.2%	2.6%

Source: American Community Survey 5-year estimates, 2006-2010

The mix of housing types in the Township is relatively similar to that in the surrounding area. Pocopson has the most single-family detached housing and the least multi-family, while Kennett Square, as would be expected for a Borough, has a notably higher percentage of duplexes, twins, and multi-family housing. Pennsbury, due to a large-sized retirement and assisted living unit complex relative to its total housing stock, has the highest proportion of multi-family units of the townships; higher than the County overall and nearing the amount in the Borough.

Age of Housing

Table 8-5 shows the age of housing in the Township and the surrounding area. This is a consideration as a higher percentage of older housing can have local planning implications, such as possible needed adjustments to building or other code requirements to meet the needs of older buildings or additional financial burdens on municipal residents due to greater building repair needs.

Table 8-5: Age of Housing, Kennett Township and Surrounding Area

MUNICIPALITY	1939 OR EARLIER	1940 -49	1950- 59	1960- 69	1970- 79	1980- 89	1990- 99	2000- 09
KENNETT TOWNSHIP	11.3%	1.4%	7.3%	7.7%	21.5%	17.7%	18.1%	15.1%
NEW GARDEN	8.4%	1.6%	6.1%	2.6%	4.9%	4.9%	39.4%	28.9%
EAST MARLBOROUGH	14.6%	4.5%	8.3%	3.7%	10.1%	10.1%	17.1%	21.8%
PENNSBURY	6.1%	1.3%	8.6%	12%	26.5%	26.5%	6.4%	6.6%
POCOPSON	15.0%	0.8%	8.2%	5.9%	18.1%	24.1%	9.6%	18.3%
KENNETT SQUARE	32.2%	9.5%	15.9%	10.9%	7.5%	7.5%	9.4%	7.0%
KENNETT REGION	14.6%	3.2%	9.1%	7.1%	14.8%	15.1%	16.7%	16.3%
CHESTER COUNTY	14.4%	2.9%	9.5%	10.5%	15.1%	16.9%	16.1%	14.6%
NORTHERN NCC DE	7.5%	4.1%	10.0%	11.9%	14.9%	25.9%	19.4%	6.2%
NEW CASTLE COUNTY DE	12.4%	7.3%	15.0%	15.0%	13.0%	13.3%	14.2%	9.8%

Source: US Census Bureau; American Community Survey 5-year estimates, 2006-2010

¹ Tables 8-3 and 8-4 show census defined housing types, which differs from PA MPC defined housing types. See above and Chapter 7 for more information.

The level of residential development in the Township has been fairly consistent since the 1970s - the decade when housing construction in the Township peaked - with over 70 percent of existing housing having been built since 1970. This compares to the County overall as well as East Marlborough, but differs from most surrounding areas, which had higher levels of housing construction in certain decades. Kennett Square Borough clearly, and expectedly, has the oldest housing stock in the Kennett area. The majority of existing Kennett Township housing stock being relatively ‘newer’ reflects the more recent development patterns found in the Township, County, and Region at-large.

Housing Occupancy and Tenure

Table 8-6 indicates when a household moved into its current place of residence. This data includes both existing Township residents relocating to another area of the Township as well as new residents who have moved into the Township.

Half of Township households moved into their current place of residence since 2000, reflecting the larger national trend of the mobile nature of many households in the U.S. over the past few decades. The rate in the Township is similar to the County overall where 54 percent of households were mobile moving into their current place of residence during the last 10 years. In contrast, only about 18 percent of Township households have lived in the same place for a long term of 20 years or longer.

Housing occupancy in Table 8-7 shows the proportion of owner-occupied housing and renter-occupied housing, and is used to examine the extent to which housing units are owned or rented. Vacancy rates indicate the percentage of housing units that are not occupied and these rates are used to examine stability and housing demand in a community.

About 5 percent of housing in the Township is vacant, the same as the County overall. Having some properties vacant is desirable as it allows mobility and housing choice within a community. The optimum vacancy rate for the Philadelphia region, as established by DVRPC, is 4 percent - a lower rate indicates a very stable community and/or high housing demand, while a higher rate signifies out-migration or overbuilding of housing. Though the vacancy rate in the Township is slightly higher than optimum, it is not a significant enough difference to warrant concern, particularly as it is comparable to the countywide rate.

Of the occupied housing units in the Township, about 79 percent are owner-occupied. This is comparable to the Kennett Region and County overall. East Marlborough, which still has many large tracts and family-owned farm and rural tracts, not surprisingly has a higher rate of home ownership. Pocopson, which has the highest percent of single-family housing, also has the highest rate of home ownership. Kennett Square, a Borough with mixed uses and a diversified and higher density housing stock, expectedly has the highest percent of rental housing units, while Pocopson, which has the lowest percent of multi-family units, also has the lowest number of rental units.

Household Size

Household size indicates the average number of persons per household. This information helps in determining how many housing units are needed to serve existing and future Township population. Table 8-8 shows average household size in the Township, surrounding area, County, and state.

Table 8-6: Tenure in Current Residence, Kennett Township

YEAR HOUSEHOLD MOVED INTO HOUSING UNIT	OCCUPIED HOUSING UNITS	
	Count	Percentage
TOTAL	2,951	100%
2000 TO 2010	1,498	50.7%
1990 TO 1999	918	31.1%
1980 TO 1989	273	9.3%
1970 TO 1979	131	4.4%
1969 OR EARLIER	131	4.4%

Source: US Census Bureau, 2010; American Community Survey 5-year estimates, 2006-2010

Table 8-7: Occupancy, Kennett Township and Surrounding Area

MUNICIPALITY	TOTAL UNITS 2010	TOTAL OCCUPIED UNITS	VACANT HOUSING UNITS	OWNER-OCCUPIED UNITS	RENTER-OCCUPIED UNITS
KENNETT TOWNSHIP	3,151	94.8%	5.2%	78.7%	21.3%
NEW GARDEN	3,873	95.4%	4.6%	76.2%	23.8%
EAST MARLBOROUGH	2,667	95.5%	4.5%	89.2%	10.8%
PENNSBURY	1,550	94.6%	5.4%	75.9%	24.1%
POCOPSON	1,189	96.7%	3.3%	93.9%	6.1%
KENNETT SQUARE	2,084	95.1%	4.9%	53.9%	46.1%
KENNETT REGION	14,514	95.4%	4.7%	78.0%	22.0%
CHESTER COUNTY	192,462	95.0%	5.0%	76.2%	23.8%
NORTHERN NCC DE	11,687	93.8%	6.2%	87.0%	13.0%
NEW CASTLE COUNTY DE	217,511	93.2%	6.8%	69.7%	30.3%

Source: US Census Bureau, 2010

Until 2000, decreasing household size was an ongoing national trend.¹ Since then, average household size nationally has leveled off or even increased in some places. As of 2010, average household size in Kennett Township was 2.5 persons, which has been fairly consistent since 1990, but which is, and has been, lower than all nearby communities, except Pennsbury, as well as lower than the County and U.S. Smaller household sizes in the Township, and Pennsbury, in part, are likely a reflection of a large retirement community/ higher number of retirement housing units located in both townships and the significant percentage of population in the 65 years+ age group. With the aging of the ‘baby boom’ generation, it is likely that the Township and County overall will see increases in the number of households with persons 65 years+ and thus increased demand for types of housing that address their needs, e.g. smaller size units and lots, less maintenance, single story units, and greater access/proximity to services.

In the area, East Marlborough experienced the greatest decrease in average household size, which may be related to its large rural and farm tracts being operated by an aging population/empty nesters, while Kennett Square experienced a 10 percent increase in average household size, which is in part related to the increase in the number of Latino households. Census data shows that Latino households on average are larger than those of the general population in Kennett Square, and southern Chester County in general.

Table 8-8: Average Household Size, Kennett Township and Surrounding Area

MUNICIPALITY	1980	1990	2000	2010	CHANGE 2000-2010
KENNETT TOWNSHIP	2.73	2.52	2.56	2.50	-2.3%
NEW GARDEN	2.99	2.86	3.16	3.20	1.3%
EAST MARLBOROUGH	3.16	2.95	2.92	2.69	-7.9%
PENNSBURY	2.82	2.77	2.41	2.42	0.4%
POCOPSON	3.29	3.04	2.80	2.95	5.4%
KENNETT SQUARE	2.67	2.67	2.77	3.05	10.1%
KENNETT REGION	2.94	2.80	2.77	2.80	1.1%
CHESTER COUNTY	2.90	2.73	2.65	2.65	0%
NORTHERN NCC DE	2.91	2.84	2.72	2.66	-2.2%
NEW CASTLE COUNTY DE	2.79	2.61	2.56	2.57	0.4%
PA	2.75	2.57	2.48	2.45	-1.2%

Source: US Census Bureau, 1980-2010

Households by Type

Table 8-9 shows the various types of households in the Township, Kennett Region, and County. As of 2010, the majority of households in the Township, Region, and County consist of ‘family households’ (related persons living together), with a little less than half those households having children under 18 years of age. The percentage of family households with children is less in the Township than for the Region or County overall.

Table 8-9: Household Type, Kennett Township and Chester County

HOUSEHOLD TYPE	2000 PERCENT OF TOTAL HOUSEHOLDS			2010 PERCENT OF TOTAL HOUSEHOLDS		
	KENNETT TWP	KENNETT REGION	CHESTER COUNTY	KENNETT TWP	KENNETT REGION	CHESTER COUNTY
TOTAL FAMILY HOUSEHOLDS *	73.3%	76.3%	71.8%	69.2%	75.9%	70.6%
WITH CHILDREN (< 18 YEARS)	31.9%	49.5%	35.1%	28.7%	34.8%	33.0%
TOTAL NONFAMILY HOUSEHOLDS **	26.7%	23.8%	28.2%	30.8%	24.1%	29.4%
TOTAL HOUSEHOLDER LIVING ALONE	23.5%	20.2%	22.6%	26.4%	19.8%	23.0%
65 YRS+	15.1%	9.9%	7.6%	16.2%	10.4%	8.6%
TOTAL HOUSEHOLDS OF ALL TYPES, WITH ONE OR MORE PERSON 65 YRS+	33.7%	22.7%	21.5%	35.9%	27.0%	24.4%

Source: US Census Bureau, 2000-2010 * related persons with and without children ** non-related persons living in one house

The number of ‘non-family households’ (unrelated persons living together) account for approximately one-third of households in the Township and County, and somewhat less (about one-quarter) of households in the Region. In all cases, the vast majority of non-family households consist of one householder/person living alone. Unlike the County (and Region), the majority of persons living alone in the Township are 65 years or older.

Households of all types ‘with persons 65 years+’ represent over one-third of households in the Township, and around one-quarter in the County and Region. With the aging of the ‘baby boom’ generation, it is likely that the Township, Region, and County will see increases in the number of households in this age group over the next decade and an increase in demand for housing that addresses their needs.

1 U.S. average household sizes: 4.6 (1900), 4.54 (1910), 4.34 (1920), 4.01 (1930), 3.68 (1940), 3.38 (1950), 3.29 (1960), 3.11 (1970), 2.75 (1980), 2.63 (1990), 2.59 (2000), 2.6 (2009), 2.59 (2010)

The mix of household types in the Township, Region, and County reflects the national trend of declining percentages of the ‘traditional’ nuclear family and the widening range and increasing percentages of other household configurations¹. A 2010 Pew Charitable Trust Study noted a related new emerging trend of the revival of multi-generational family households - due in part to the economic recession and resulting job losses and home foreclosures, and in part to other demographics factors such as an aging population. In the Kennett area, the immigrant Latino population is more likely to share housing across generations than is the general population.² In 2008, 16.1 percent of the U.S. population lived in a family household including two or more adult generations. This represents the beginning of a reversal of the trend that started after World War II when multi-generations living together began to decline due to factors such as the growth of the nuclear family geared suburbs, decline in immigrant population, and increase in the mortality age and economic prosperity of the 65 years+ population. This new trend is occurring among a range of demographic segments with both economic and social demographic factors contributing.

Types of housing units needed depend household size as well as other factors including ongoing national economic challenges, a revival of multi-generational family households, an aging population, and national trends towards more compact mixed-use development and these factors affect the demand for smaller housing types, which may include smaller single houses, townhouses, condominiums, or apartments. At the same time, the growth of the immigrant population in the Kennett area continues to create demand for units to accommodate larger families and household sizes.⁶

Housing Value

Table 8-10 shows median house value trends based on what owners believe their home is worth, while Table 8-11 shows median house sales price trends based on actual prices of homes sold during the particular year.

Table 8-10 illustrates the dramatic increase in housing values since 2000. This rapid increase in housing values can be attributed

Table 8-10: Median Reported Housing Value, Kennett Township and Surrounding Area

MUNICIPALITY	MEDIAN REPORTED HOUSING VALUE				CHANGE	
	1980	1990	2000	2006/10	1990-2000	2000-2006/10
KENNETT TOWNSHIP	\$93,200	\$236,400	\$248,500	\$464,400	5.1%	86.9%
NEW GARDEN	\$61,800	\$161,700	\$230,500	\$435,000	42.5%	88.7%
EAST MARLBOROUGH	\$91,500	\$223,500	\$265,800	\$443,600	18.9%	66.9%
PENNSBURY	\$89,600	\$252,700	\$269,200	\$500,400	6.5%	85.9%
POCOPSON	\$77,200	\$223,100	\$242,900	\$494,900	8.5%	103.7%
KENNETT SQUARE	\$46,300	\$110,600	\$122,300	\$221,900	10.6%	81.4%
KENNETT REGION	\$76,600	\$201,333	\$229,867	\$426,700	14.2%	85.6%
CHESTER COUNTY	\$63,500	\$155,900	\$182,500	\$334,300	17.1%	83.2%
NORTHERN NCC DE	na	na	\$260,500	\$460,400	na	73.7%
NEW CASTLE COUNTY DE	na	\$143,300	\$136,000	\$252,800	-5.1%	85.9%

Source: U.S Census Bureau, 1980- 2000, American Community Survey 5-year estimates, 2006-2010 as reported by the homeowner.

Table 8-11: Median Sales Prices Per Year Kennett Township and Chester County

YEAR	# OF TWP SALES	TWP MEDIAN PRICE	# OF COUNTY SALES	COUNTY MEDIAN PRICE
2000	114	\$256,750	9,241	\$188,000
2001	153	\$305,000	9,083	\$200,000
2002	149	\$352,000	9,212	\$224,900
2003	165	\$435,000	10,240	\$245,000
2004	168	\$375,000	9,492	\$265,000
2005	171	\$430,000	9,333	\$295,000
2006	169	\$366,000	8,336	\$302,000
2007	126	\$372,500	7,335	\$312,000
2008	99	\$398,500	5,911	\$300,000
2009	99	\$354,900	5,413	\$276,700
2010	102	\$289,100	5,188	\$295,000
2011	84	\$358,000	4,952	\$290,000

Source: Chester County Planning Commission, Housing Costs Profiles, 2000-2011.

to record low mortgage interest rates, pent up demand to purchase a house, and financial boom years and liberalized lending practices/ mortgage options in the mid-2000’s. In the County, rapid population growth and the trend of increasingly larger houses also played a role in the rapid rise of housing values. The median reported housing value in Kennett Township is similar to the surrounding Townships and notably higher than in Kennett Square and the County.

Table 8-11 shows the median sales price of homes sold in Kennett Township and the County per year from 2000 to 2011. Housing sales prices escalated in the Township through 2008 with peak values in 2003, 2005, and 2008. Countywide median sales prices escalated rapidly (and more steadily than the

¹ U.S. Family Households: 73.7% (1980); 70.8% (1990); 69% (2000); 67% (2010). PA Family Households:- 70.2% (1990); 67.2% (2000); 65% (2010) Chester County - 77.9% (1980); 74.5% (1990); 71.8% (2000)

² Southern Chester County Transportation and Housing Study (2014)

Township) through 2007, decreasing 4 percent in 2008. In 2009, with the nationwide economic downturn and housing market crisis in full swing, both the Township and the County saw a notable decrease in housing prices, while the number of sales had already begun to decline. Number of sales has remained lower, but consistent since 2008, in both the Township and the County. Median prices increased in 2011 in the Township and stayed fairly level in the County, signs that the housing market had started to level off and stabilize since the crisis. When comparing changes in housing prices over the course of a decade, it is notable that the Township had a 39 percent increase in housing sales prices from 2000 to 2011 and the County a 54 percent increase, in spite of the 2001-2002 national economic slowing and 2008-2009 national economic recession. This significant rise in housing prices has implications for housing affordability.

Table 8-12 provides median rents in the Township, surrounding area, and County, as reported by renters. Since 1990, median rent in the Township was relatively level decreasing somewhat, whereas median rent nearly doubled in many of the other communities in the Region. Median rent decreases in the Township was likely due to the greater number of multi-family units built since 1990 as a proportion of total housing. Higher overall rents in the Township, as well as Pennsbury, are likely related to the number of retirement communities in both municipalities and because those contracted rents likely include other services otherwise beyond standard base rents. High rent is another important housing standard to consider as it is related to issues of housing affordability. While there is a growing lifestyle choice trend toward renting rather than owning a home, due to some of the economic factors discussed above some individuals may be renting not by choice but in part because they cannot afford to purchase or maintain a home, or may be in a life stage or circumstance where renting is the only option. When home ownership and rentals are unaffordable, there are significant economic, cost of living, and quality of life implications.

Table 8-12: Median Reported Residential Rent[^], Kennett Township and Surrounding Area

MUNICIPALITY	MEDIAN REPORTED RENT			CHANGE	
	1990	2000	2006/10	1990-2000	2000-2006/10
KENNETT TOWNSHIP	\$1,000	\$1,655	\$916	65.5%	-44.7%
NEW GARDEN	\$400	\$533	\$782	33.3%	46.7%
EAST MARLBOROUGH	\$447	\$543	\$850	21.5%	56.5%
PENNSBURY	\$1,000	\$1,896	\$2,000	89.6%	5.5%
POCOPSON	\$519	\$747	\$1,113	43.9%	49.0%
KENNETT SQUARE	\$443	\$571	\$799	28.9%	40.0%
KENNETT REGION	\$635	\$991	\$1,077	56.1%	8.7%
CHESTER COUNTY	\$496	\$664	\$928	33.9%	39.8%
NORTHERN NCC DE	na	\$969	\$962	na	-0.7%
NEW CASTLE COUNTY DE	na	\$593	\$807	na	36.1%

Source: U.S Census Bureau, 1990-2000, American Community Survey, 5-year estimates 2006-2010 as reported by renters [^] contracted monthly rent

Housing Affordability

Housing affordability is an analysis of housing cost as a percentage of median income. When the cost of housing increases at a faster rate than income, housing becomes less affordable. Based on industry standards, 30 percent is the maximum amount of household income that should be devoted to housing costs (whether purchasing or renting). Households paying more than 30 percent of their income towards housing costs are considered ‘cost-burdened’ by their housing. Table 8-13 indicates that renters in the area are generally more cost-burdened by their housing than owners, but that since 2000 the number of households cost-burdened by their housing has increased for both renters and owners, with a few exceptions. This increase in housing cost-burden can be explained in part by the rapid increase in housing prices and rents since 2000.

Table 8-13: Housing Affordability, Kennett Township and Surrounding Area

MUNICIPALITY	PERCENT OF HOUSEHOLDS COST-BURDENED BY HOUSING			
	OWNERS		RENTERS	
	2000	2006/10	2000	2006/10
KENNETT TOWNSHIP	20.1%	27.6%	46.8%	40.5%
NEW GARDEN	21.8%	29.0%	22.3%	53.4%
EAST MARLBOROUGH	17.9%	32.3%	10.7%	27.6%
PENNSBURY	20.8%	25.3%	63.7%	62.9%
POCOPSON	17.0%	27.4%	10.0%	60.0%
KENNETT SQUARE	31.2%	47.3%	31.6%	44.5%
KENNETT REGION	22.0%	31.0%	31.0%	48.0%
CHESTER COUNTY	22.3%	30.5%	33.0%	43.4%
NORTHERN NCC DE	14.5%	20.3%	42.2%	42.5%
NEW CASTLE COUNTY DE	18.7%	27.9%	35.8%	51.5%

Source: U.S Census Bureau, 1990-2000, American Community Survey, 5-year estimates 2006-2010

The housing cost burden figures illustrate a clear gap between household income and housing costs for a significant portion of the population in the Township and countywide. This gap likely continued or worsened with the economic downturn. Chester County and the overall Philadelphia metropolitan region have experienced a smaller decrease in housing prices during the economic downturn than other areas and the nation overall. The total drop in housing values for the Philadelphia region is expected to be about 10 percent (from highest to

lowest value), compared with a 34 percent drop nationally¹. Even with a drop in prices, housing affordability continues to be a concern for many Chester County residents and communities. Chester County’s housing market is expected to recover slowly once labor market conditions improve and unemployment declines.

Housing Fair Share

Distantly related to the topic of housing affordability is the concept of ‘fair share’. In PA for municipal housing planning purposes, ‘fair share’ refers to the need to allow a variety of housing types in zoning, and in particular, a reasonable amount of multi-family housing. This need is both required in the PA MPC and through court case law findings, however, to date there is no mandate related to housing pricing or providing for a range of housing prices. In some cases, multi-family housing could also provide an affordable housing option, but this is less likely in expensive housing markets such as many areas of in southeastern PA. This section provides an overview of ‘fair share’ and how it applies to Kennett Township.

The PA Supreme Court case *Surrick V. Upper Providence Township* (776 Pa. 182 (1977), 382 A2d 105) laid out a 3-tier analysis that can be used by municipalities in evaluating fair share needs. The 3-tiers are intended to be analyzed progressively with a municipality moving to the next tier after answering ‘yes’ to the prior.

1. Is the municipality a logical area for growth and development? (e.g., is it in the path of growth?)
2. Is the municipality a developed or developing community?
3. Is the amount of land available for multi-family development disproportionately small, in relation to population growth pressure and present level of development?

Tiers 1 and 2 are met by the Township. In terms of location, development history, and growth patterns (Chapter 7), the Township is a location place for growth. Since 1990, Township population growth has been greater than Chester County overall and most of the other municipalities in the Kennett Region. In spite of the 2008/9 economic recession that led to overall decreases in home sales numbers nationwide, housing demand in the Township slowed but has continued. Based on population forecasts (Chapter 3), growth is expected to continue though at a slower rate. About 22 percent of lands in the Township are still potentially developable and not highly constrained (Table 7-4) and the Township is accessible from major roads (Routes 1, 52, and 41), several well-traveled local roads, and two states. There is continued interest in the Township in terms of new development proposals (Table 7-3). These factors indicate the Township remains a developing community.

Tier 3 has been further refined since *Surrick* by additional case law. This has provided some general guidelines to analyze whether a municipality is addressing fair share, however case law has not established a definitive number of multi-family units or percentage of land for multi-family needed for a municipality to meet its fair share. To look at fair share for Kennett Township, the following guiding criteria are used:

- **Multi-family as a Percentage of Total Projected Housing Units** – Based on case law, at least 15 percent of housing units needed to accommodate forecasted population growth should be multi-family. For the Township, this means at least 54 of the additional 357 housing units projected to be needed from 2015 to 2025 plus at least 53 of the additional 356 housing units projected to be needed from 2025 to 2035 should be for multi-family. Thus, a total of at least 107 additional housing units should be permitted in the Township as multi-family to 2035.

Table 7-6 (Chapter 7) indicates an additional 99 and 822 total housing units are possible on remaining buildable lands in the future land use Growth Area categories (Planned Neighborhood, Village², and Economic Development) that are most likely to accommodate multi-family units.

Multi-family housing under the open space development option is also allowed in the Specialized Agriculture and Industry category, though large scale residential development, such as would be

¹ ‘Housing Stimulus Recovery Stymied by Foreclosures,’ Michael Bratus; Daily Local News, March 10, 2010.

² Village includes Hamorton only (and not Mendenhall), where multi-family is allowed.

needed for an open space design development, would be incompatible with the industrial focus of the category. Suburban Residential, while able to accommodate multi-family via the open space design option, does not include remaining tracts large enough to have an open space design development.

If future land use Rural Resource Areas categories are also included (multi-family is permitted under the open space design option), projected needed multi-family units could be further accommodated if needed in Rural Residential. While technically Resource Conservation also allows multi-family under the open space design option, based on the Land Use Plan this category is intended to remain in low intensity uses and agriculture; so adding an intensive use in an area with little or no existing and necessary infrastructure is incompatible with overall Township planning policy.

With a range of 99 to 822 new housing units possible on remaining buildable lands in three future land use Growth Area categories, these areas likely can accommodate the projected need for 107 additional multi-family units by 2035. The Township Land Use Plan can meet fair share in terms of housing units.

- **Land Designated and Available for Multi-Family** - The amount of land designated and available for multi-family development in comparison to total land available for all types of development in the Township is also analyzed. Since court cases are not consistent in how they define ‘available’, this analysis considers 1) developable land that allows for multi-family (e.g. Developable Land column three of Table 7-6) and 2) all land (developable or not) designated for multi-family. Based on prior court case findings, it appears that at least 5 percent of ‘available’ land should allow for multi-family.

Developable Land - In Growth Areas, developable land for multi-family units includes:
99 acres (PN, V, ED¹) + 37 acres (A/I) / 2,047 total developable acres = 6.6% of developable land

In Rural Resource Areas, developable land for multi-family units includes:
392 acres (30%² of RC) + 150 acres (45% of RR) = 542 acres / 2,047 total developable acres = 26.5% of developable land.

All Land where multi-family units are permitted, whether or not that land is currently available for development, developed, or developable includes:

874 acres (PN, V, ED) / 9,921 total acres in Township = 8.8% of all land in Township
2,074 acres (SR, A/I) / 9,921 total acres in Township = 20.9% of all land in Township
6,072 acres (RC, RR) / 9,921 total acres in Township = 61.2% of all land in Township

The Township Land Use Plan meets fair share for land designated and available for multi-family units.

Another consideration is analyzing fair share on a region-wide basis. If KARPC municipalities completed a Regional Comprehensive Plan update and afterwards enter into an Intergovernmental Cooperative Implementation Agreement, Kennett Township could address their multi-family obligations and other land use items on a regional basis. However, until such time, the Township will need to ensure it fulfills its multi-family fair share obligations on a municipal basis.

Planning Implications

- **Population Growth Rates** are projected to continue for the foreseeable future, though not at the rapid level experienced in the Township between 1990 and 2010. This growth will likely have implications for continued pressure in the Township for housing development. Ensuring that future growth occurs in a manner acceptable to the Township and having the least impact on its resources has been a high Township planning priority.

¹ Abbreviations refer to future land use categories in Chapter 7: PN = Planned Neighborhood, V = Village, ED = Economic Development, A/I + Specialized Agriculture & Industry, SR = Suburban Residential, RC = Resource Conservation, and RR = Rural Residential.

² Acreage is reduced to address required open space to be protected under the open space design option.

- **Household Size, Composition, and Housing Needs** - Kennett Township has followed the overall national trend of decreasing average household sizes over the past 100+ years. However, countywide and Township average household sizes have remained relatively level since 1990, which may be indicative of a change in the trend, though, it is likely that the Township will continue to have smaller household sizes as compared to most of the surrounding area and the County. When there are smaller average household sizes, the number of housing units required to accommodate the population increases; this has implications for municipal planning related to future housing unit demand. In addition, there are demographics factors, such as an increase in overall median population age, one-person households, as well as multigenerational households, which affect the types of housing needed. The combination of changing household composition and average household size leveling off with lower overall numbers of persons per household indicates a potential Township and countywide need for a wider variety of housing choices to accommodate changing housing demands and needs.
- **Housing affordability** for both purchased and rental units is a growing issue for a significant segment of the population in the Township, surrounding area, and County overall, an issue that is likely to continue within the timeframe of this Comprehensive Plan. Even with drops in housing prices from 2008 to 2010 in the Township and County, housing affordability continues to be a concern for many Chester County residents and communities. Though there is an emerging trend toward an increase in persons wanting to rent for lifestyle, demographics, and social reasons, some individuals may be renting not by choice but in part because they cannot afford to purchase a home. If rentals, as well as home ownership, are unaffordable or unavailable there are significant economic, cost of living, and quality of life implications.
- **Fair Share** in allowing for multi-family housing is a need PA municipalities must address. The Township addresses items related to housing fair share in the Land Use and Housing Plans. Assessment of fair share is best made through completing an analysis of the potential allowance for multi-family housing in the Land Use Plan as compared to PA court decisions relating to housing fair share. Based on the housing fair share analysis in this Chapter that uses future land use planning from Chapter 7, the Land Use Plan meets housing fair share for both units and lands available for multi-family housing to 2035.
- **Fair Housing** - Communities need to be aware of the obligation under the federal Fair Housing Act to permit housing opportunities for all people, regardless of race, color, national origin, gender, religion, disability, and familial status (the presence of children under 18 in the household).

Recommendations

Housing Supply and Diversity

8-1 **Review ordinances and amend if needed to allow varying residential densities and diverse choices in designated growth areas.**

Kennett Township has provided opportunities for a diversity of housing types, sizes, and densities. Anticipated demographic trends will likely continue to create demand for a variety of housing types over the next decade. It appears that a shift in the market has already begun and there is a strengthening demand for smaller homes and a renewed interest in renting vs. homeownership. A density of 8 multi-family units to an acre in proportion and relation to building height and impervious coverage should be considered as appropriate in planned growth areas around the Borough. This density reflects that currently permitted for multi-family development of in the R-4, V-1, and C zoning districts. This type of density can allow stormwater management and natural resource-related benefits, e.g. reduced lot impervious surface and/or building footprint coverage. This level of density necessitates community or public water and sewer systems and so it is dependent on system availability and capacity. Increasing sewer capacity and/or extending sewer

and water lines may need to be examined for this density proposed in growth areas around the Borough and near the northwestern border with New Garden. For example, PA DEP requires differing sewer capacity for different types and sizes of uses, e.g. a 1-bedroom apartment may need an allotment of 150 gallons/day (~ 0.38 EDU) while a 2-bedroom apartment may need 185 gallons/day (~ 0.46 EDU). (An EDU or *equivalent dwelling unit* equals wastewater flows of 400 gallons/day, which for planning purposes is the average need of one single-family dwelling. Sewer and water planning is discussed in Chapter 10)

8-2 Recognize the needs and cultural norms of various demographic populations in the Township and provide opportunities for quality affordable housing options accessible to these residents.

Census information trends indicate an increase in overall median population age, one-person households, multigenerational households, as well as continued immigration of immigrant populations, particularly from Central American countries into the Region. Additionally, looking at a regional perspective based on the Southern Chester County Transportation and Housing Study (2014), employers in southern Chester County are predicting an increasing need for lower wage workers in the mushroom industry as well as service and hospitality industries. All of these factors together indicate populations moving into the Region having different backgrounds, expectations, and housing preferences from Census 2000 and prior general demographics of Chester County. For example, 2010 Census projections and 2014 Study information indicate that household demographics are changing, on average, to larger and frequently multi-generational households living together under one roof. The Township, in coordination with KARPC, should consider these factors when updating planning documents and residential-related zoning and SLDO requirements.

Housing Affordability

8-3 Continue to encourage development of quality, attractive housing that is well integrated into the community and meets low- to moderate-income affordability standards.

The Township along with KARPC should be aware and examine on an ongoing basis the need for housing that meets the affordability standards for households across the broad spectrum of income levels. For example, the Granite Ridge rental community that will be close to the Borough, provide apartments at rental prices that are affordable to low and moderate income households, has on-site parking, a protected green space area, and will have ongoing apartment complex management may provide an example for the region of quality housing in a suburban setting that is affordable to those of modest means.

Housing Sustainability

8-4 Promote a mix of residential and commercial uses in growth areas around the Borough that provide pedestrian and vehicular connections to services, businesses, and amenities in the Borough and New Garden.

Development in growth areas around the Borough and near the north western section of the border with New Garden Township should be a mix of medium and higher density residential housing types, preferably also with ground floor and/or adjacent ‘Main Street’ designed commercial uses and development design standards of pedestrian access and amenities (e.g. walkways, trails, pocket parks or green areas, or on-street parking) and vehicular connectivity via through-streets. These areas would provide an extension of the Borough’s small town pattern into the areas of the Township that directly abut the Borough, effectively serving as a transition area between the more dense, small town Borough and less dense rural Township. To reflect and

complement the Borough’s small town character as well as provide a transition into Kennett Township’s less dense areas, it would be ideal if at a minimum there is a mixing of varying housing types within each development that seamlessly connects to subsequent developments in these growth areas. This may help encourage building of interconnected and pedestrian-scale developments in the Township’s planned growth areas.

8-5 Encourage development and/or redevelopment of housing that meets Leadership in Energy and Environmental Design (LEED), Energy Star, or other ‘Green’ building standards.

Sustainable housing is housing that is affordable to the resident over the long term, within healthy, vibrant neighborhoods. For some homeowners and renters, housing becomes unaffordable with the additional cost of heat and other utilities. Incorporating green methods and materials reduces energy costs, making utility costs more manageable. Features such as water conserving fixtures, energy star appliances, high efficiency lighting, renewable energy sources such as photovoltaic (PV) panels and geothermal, and green roofs all contribute to reducing energy usage and therefore lowering the long term costs for the resident.

8-6 Periodically review policies and procedures for inspection of rental properties related to health, safety, and welfare protections.

Rental housing can present challenges for a community with regard to keeping properties in good repair. The Township should continue a rental property inspection program including related regulations and an annual inspection of rentals. This could continue to and/or include in the future items such as: identifying and registering properties occupied as rentals; informing property owners and tenants about building codes and occupancy standards; ensuring landlord and tenant rights are taken into consideration and respected; and consideration that PA Departments of Labor/Industry and Agriculture already address/undertake inspections for on-site farm worker housing, which is often in the form of rentals. As well, specific needs of historic resources (which may happen to have rentals) need to be taken into consideration in order to ensure their continued longevity, viability, and integrity and the special requirements permitted under the existing building code implemented.

8-7 Inform homeowners about available resources to assist with home repair and maintenance needs through local and countywide home repair programs.

Good Neighbors is an example of a non-profit organization that provides home repair services to low-income homeowners, with a focus on southern Chester County along the US Route 1 corridor. The services are provided at no cost to the eligible homeowner. Often, low- or moderate-income residents in need of home repair services are not aware that these programs exist. Some households may continue to live in substandard conditions when help may be available. The Township newsletter and website could be used to educate residents about these programs.

Age Restricted Housing

8-8 Continue to permit new and/or redeveloped affordable, supportive senior housing.

The aging of the baby boom generation, combined with longer life expectancy, will likely lead to continued demand for alternative housing choices for the elderly. Kennett Township has provided opportunities for numerous forms of age-restricted housing. However, a recent study by the Chester County Planning Commission concluded that there is a significant gap in the Kennett area in housing options for low-income seniors. Kennett Township should consider proposals to provide new housing with convenient access to the Kennett Area Senior Center, medical offices, and retail destinations. Retirement communities and congregate care uses are permitted in several Township zoning districts (by conditional use in R-4 Residential, V-1 Village, and in the

Congregate Care Overlay in the R-4, V-1, or BP Districts). In 2011, zoning was amended to address retirement housing for very low income individuals through the RC-2 Retirement Community 2 use that is permitted in LI Limited Industrial and BP Business Park Districts by conditional use. Periodically, the Township should revisit Retirement Community, Retirement Community 2, and Congregate Care uses and provisions in zoning to ensure they are still adequate, e.g. the Congregate Care definition includes Retirement Community, but not Retirement Community 2, and Retirement Community 2 is permitted in commercial and industrial settings while a Retirement Community is permitted in residential and mixed use settings. Additionally, minimum tract sizes should be reviewed to ensure they are still appropriate.

8-9 Consider the broad range of services associated with age-restricted developments during design and construction, as well as after completion.

New or redeveloped housing for seniors should factor into its planning the progressive need for services as residents age. Many age-restricted independent living arrangements in other parts of the county did not give sufficient thought or attention to the provision of services over the long term. As seniors age within independent living situations, supportive services become critical to the effort to avoid or delay a move to institutional living. The Township should encourage applicants for age-restricted housing to develop a plan for access to supportive services as resident needs evolve.

8-10 Support Kennett Area Senior Center and other community agencies that provide home modifications or supportive services to senior citizens desiring to ‘age-in-place’ and remain living in their own homes.

A 2010 AARP survey reports that 88 percent of respondents over age 65 wanted to remain in their homes for as long as possible. The challenge for these seniors is that, as they age and mobility decreases, the need for accessibility modifications grows, as well as the need for services that are provided at home. The Neighbors in Action program, an initiative of the Kennett Area Senior Center and the InterGen Coalition, assists neighbors in need with a variety of types of assistance. Kennett Township could share information with residents, about these and other programs, through newsletters, website, and by word-of-mouth.

Fair Share Obligations

8-11 Ensure zoning creates adequate opportunities for multi-family housing.

PA municipalities are required to provide opportunity for their ‘fair share’ of multi-family housing. The case law is complicated and methodologies may vary from one community to another. Future land use categories appear to meet fair share needs, using R-4, and V-1 districts standards as the primary guidelines followed by multi-family permitted in the C district and open space design option (in R-1, R-2, R-3 and Specialized Agriculture).

Housing Accessibility / Fair Housing

8-12 Review Township ordinances, and update as needed, to provide housing opportunities that are consistent with the federal Fair Housing Act.

The Fair Housing Act prohibits discriminatory treatment, with regard to housing opportunities, toward any group or individual based upon race, color, national origin, gender, religion, disability, or familial status (presence of children under 18). A request to provide housing that would serve members of the protected classes cannot be denied on the basis of discrimination against those who are expected to occupy that housing.

8-13 Review to ensure that zoning regulations support opportunities for congregate living situations for people with special needs.

People with disabilities face some of the greatest challenges compared with other demographic groups with regard to securing safe, affordable, and accessible housing. Physically accessible units are in very short supply across the county. Also, regulatory restrictions on things like group homes and/or negative stereotypes of residents may have the impact of restricting housing choices available to individuals with disabilities.

8-14 Grant ‘reasonable accommodations’, which may include zoning variances and/or SLDO waivers, to permit development and/or redevelopment of housing for individuals with disabilities.

The federal Fair Housing Act requires that a request for relief from zoning, SLDO, or other local code requirements be granted if the request is reasonable and the relief creates an opportunity for the disabled to access housing of their choice within the local community. The request may be denied if it would create an undue burden on the municipality or result in a fundamental change to the character of the neighborhood. In general, a congregate living situation for people with disabilities should be treated like any other residential use with like requirements and restrictions.