

**Indiana Housing
Working Group**



INDIANA STATE HOUSING DASHBOARD

HOUSING NEEDS ASSESSMENT FOR SULLIVAN COUNTY

OCTOBER 2021

ACKNOWLEDGEMENTS AND DATA SOURCES

We would like to thank the **Indiana Housing Technical Working Group** for their thoughtful guidance and input throughout the development of this report.

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This report utilizes the following **data sources**:

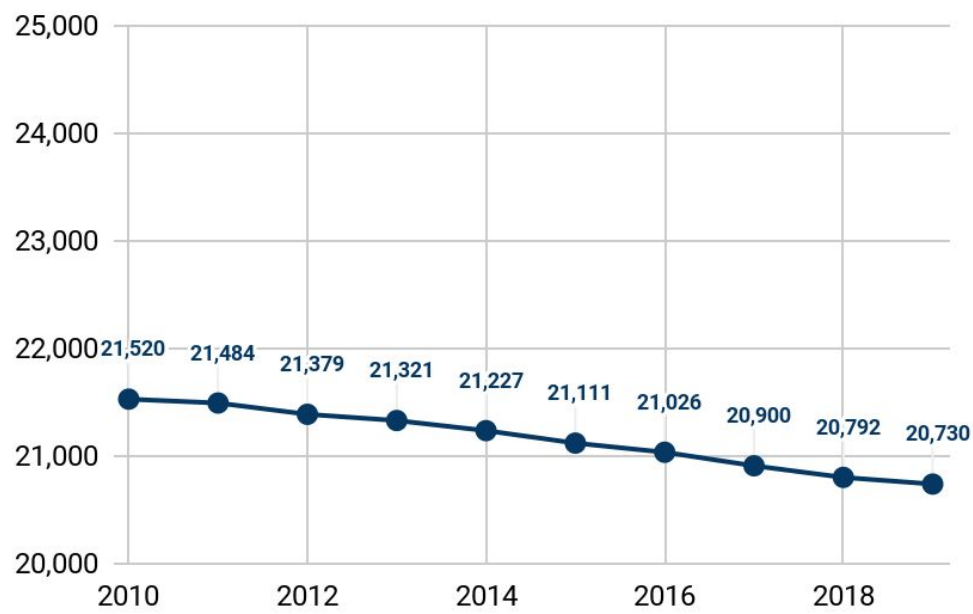
- American Community Survey (ACS) 5-year and 1-year estimates
- Federal Reserve Bank of St. Louis Economic Data (FRED)
- U.S. Census Bureau
- U.S. Census Longitudinal Employer-Household Dynamics
- Bureau of Labor and Statistics
- National Housing Preservation Database
- Indiana Realtors Association

Data in this report are updated as frequently as data sources are updated.

DEMOGRAPHIC TRENDS

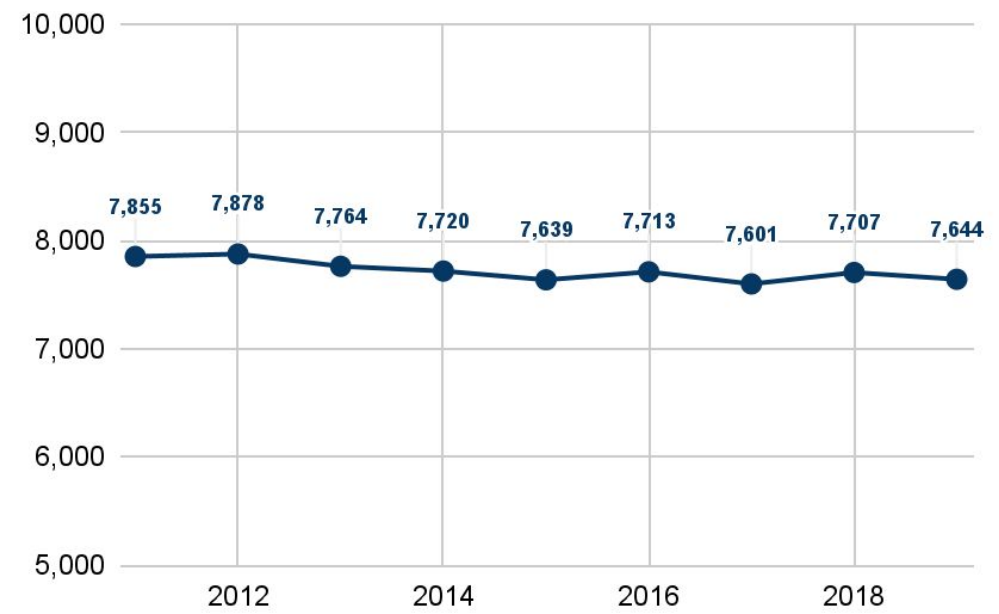
POPULATION | Sullivan County's population has decreased by 3.67% (790 people) between 2010-2019. In the same time period, the total number of households decreased by 4.84% (389 households).

Resident Population
Sullivan County | 2010-2019



Source: FRED, U.S. Census Bureau

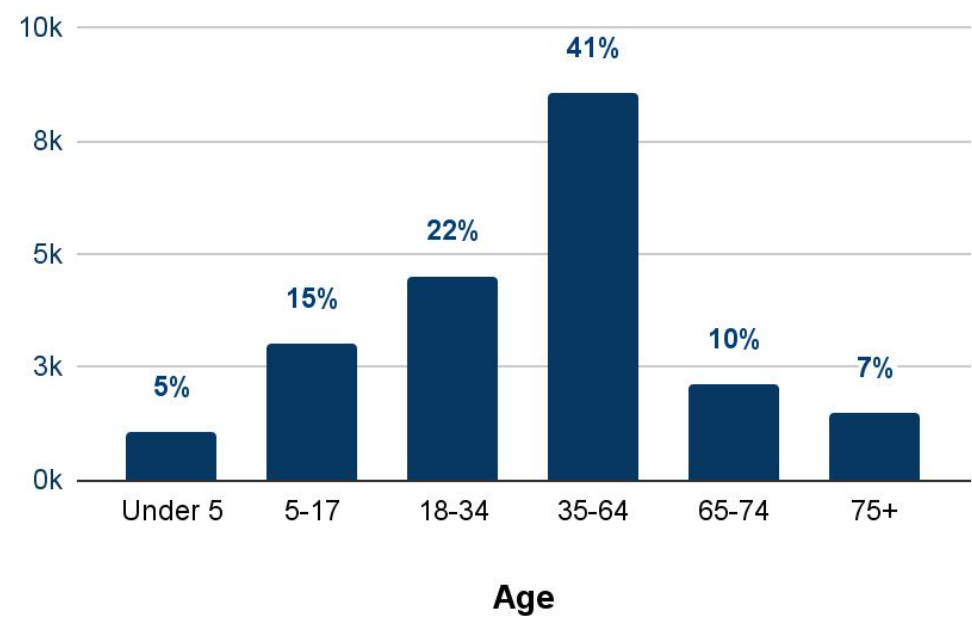
Households
Sullivan County | 2010-2019



Source: FRED, U.S. Census Bureau

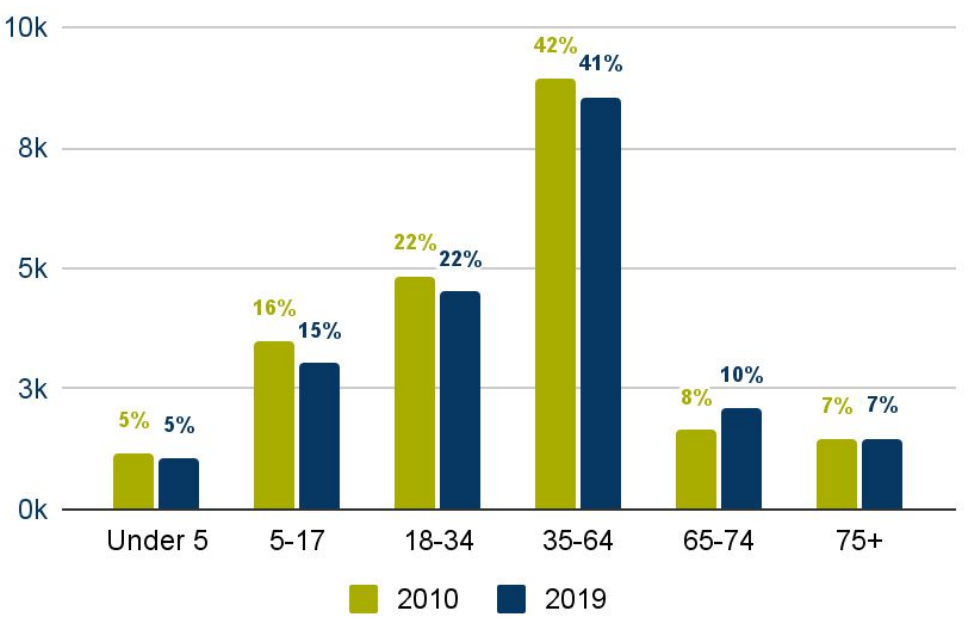
AGE | 17% of people in Sullivan County are above the age of 65, while 20% are below 18.

Population by Age
Sullivan County | 2019



Source: ACS 2019 5-year estimates

Change in Share of Population
Sullivan County | 2010, 2019

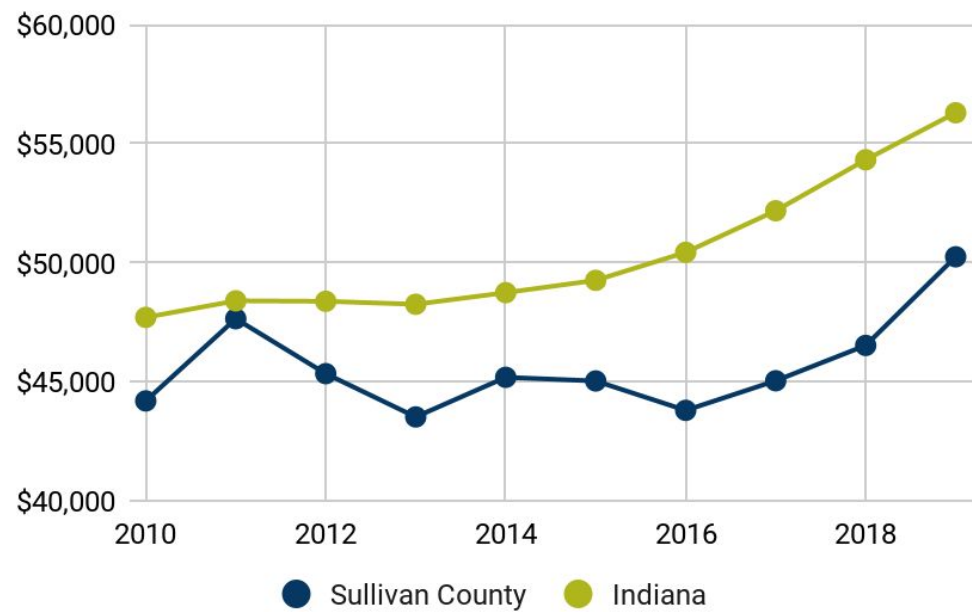


Source: ACS 2010-2019 1-year estimates

HOUSEHOLD INCOMES | Sullivan County had a median income of \$50,245 in 2019, up 14% since 2010. 35% of households have incomes below \$35,000, while 17% have incomes above \$100,000.

Median Income

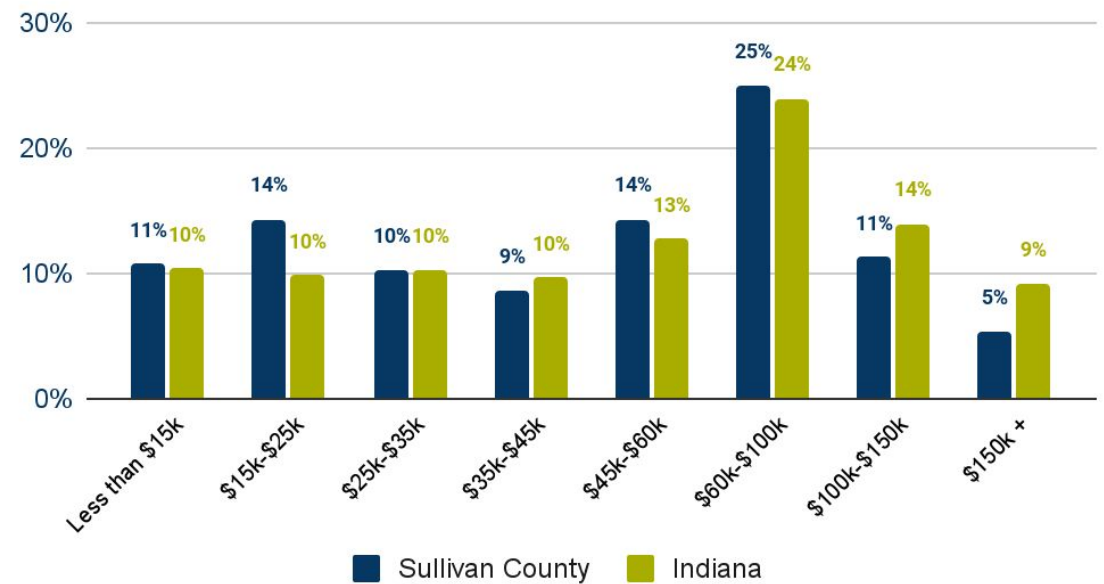
Sullivan County, State of Indiana | 2010-2019



Source: ACS 2010-2019 5-year estimates

Household Income Distribution

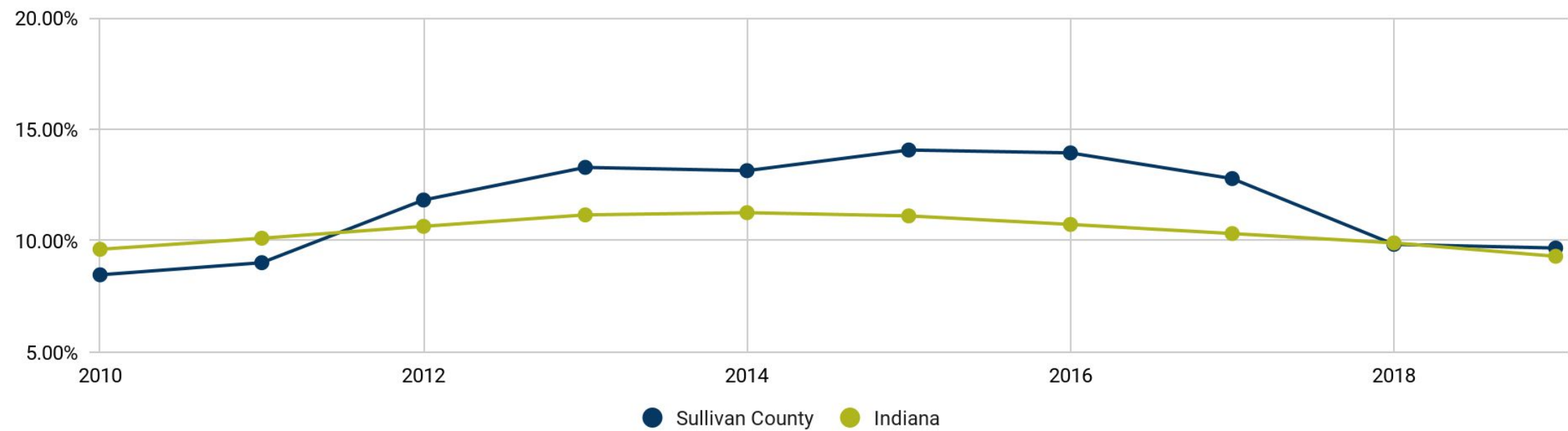
Sullivan County, State of Indiana | 2019



Source: ACS 2019 5-year estimates

FAMILY POVERTY RATE | 9.7% of families live in poverty conditions in Sullivan County, up 1.20 percentage points from 8.5% in 2010.

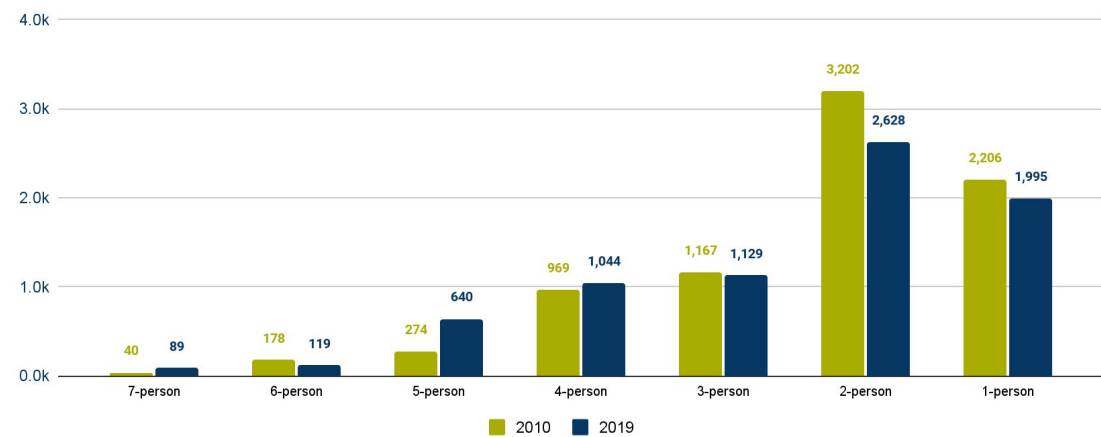
Family Poverty Rate
Sullivan County, State of Indiana | 2010-2019



Source: ACS 2010-2019 5-year estimates

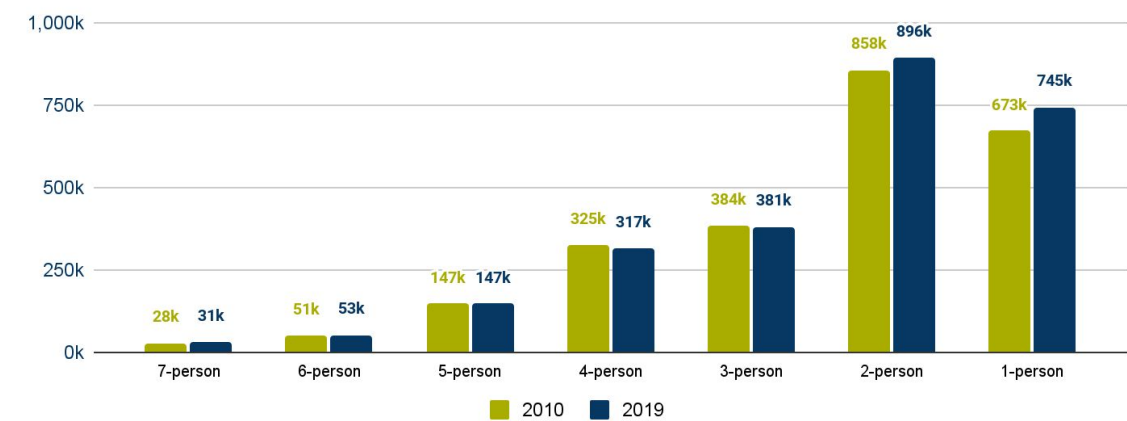
HOUSEHOLD SIZE | The average household size is 2.43 people, compared to 2.52 statewide. The Sullivan County average household has grown by 0.02 persons since 2010.

Household Size
Sullivan County | 2010, 2019



Source: ACS 2010-2019 5-year estimates

Household Size
State of Indiana | 2010, 2019



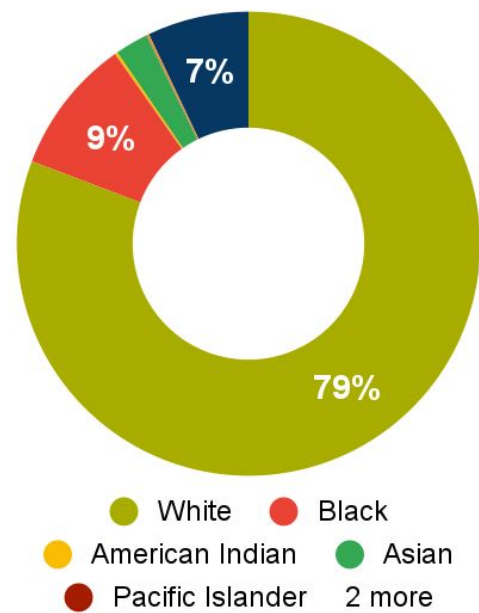
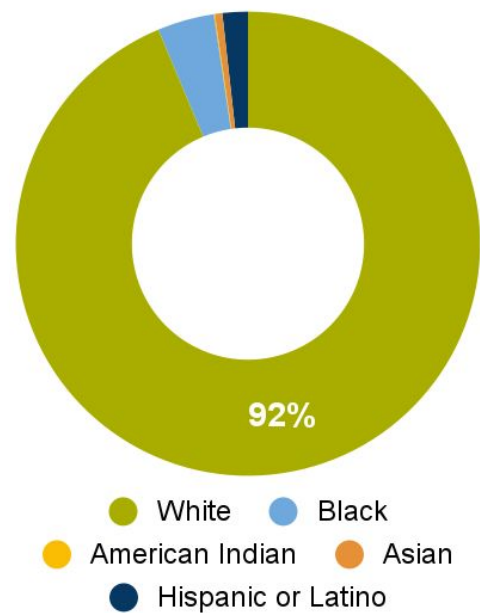
Source: ACS 2010-2019 5-year estimates

RACIAL COMPOSITION | The current racial distribution of households in Sullivan County is 92% white, 4% Black, 2% Hispanic/Latino, 1% Asian, and 0% other.

Racial/Ethnic Distribution

Sullivan County | 2019

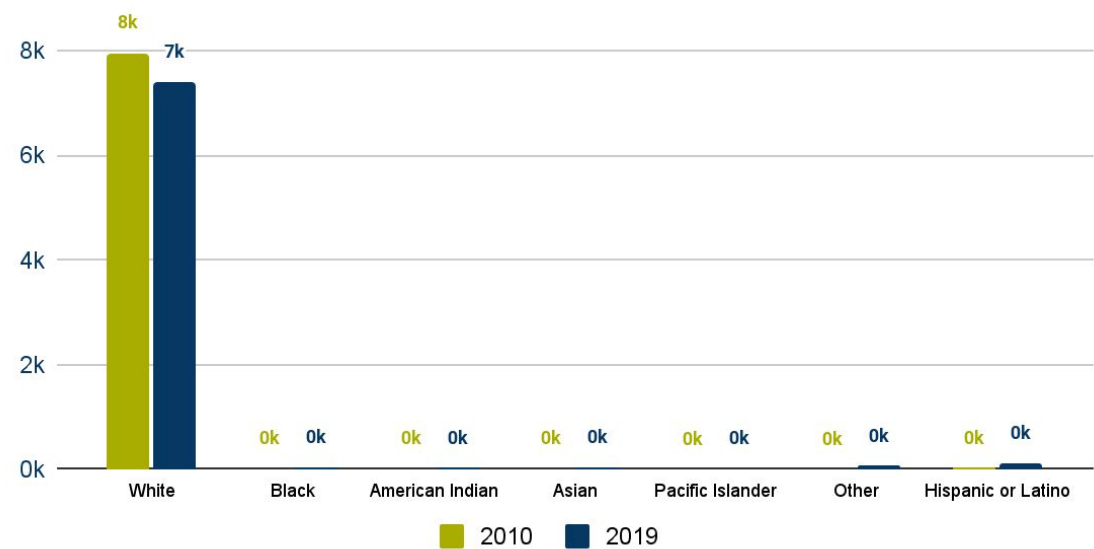
Indiana | 2019



Source: ACS 2010-2019 5-year estimates

Household Racial/Ethnic Distribution

Sullivan County | 2010, 2019



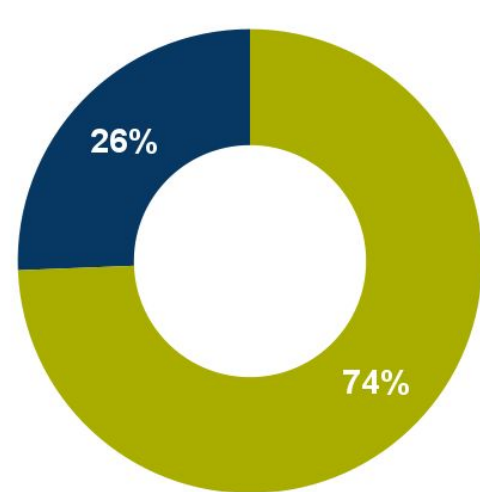
Source: ACS 2010-2019 5-year estimates

HOUSING TENURE | In 2019, 26% of households (1,959 households) in Sullivan County were renters, while 74% (5,685 households) were owner households. The share of renters has increased by 3% since 2010.

Housing Tenure

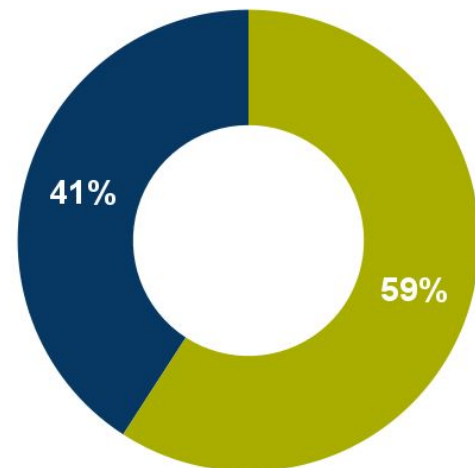
Sullivan County | 2019

Indiana | 2019



● Owner Occupied
● Renter Occupied

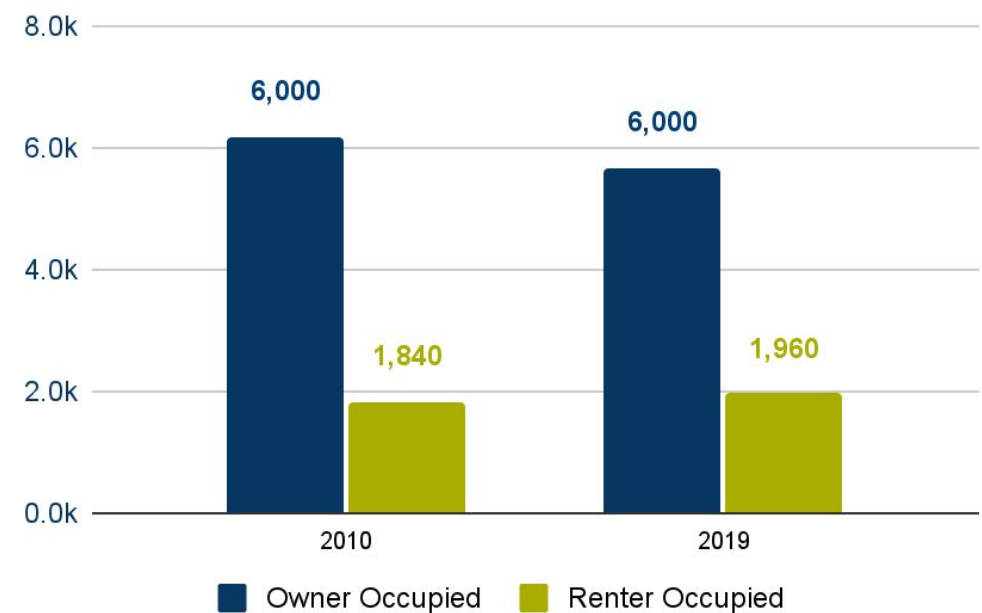
Source: ACS 2019 5-year estimates



● Owner Occupied
● Renter Occupied

Total Households by Tenure

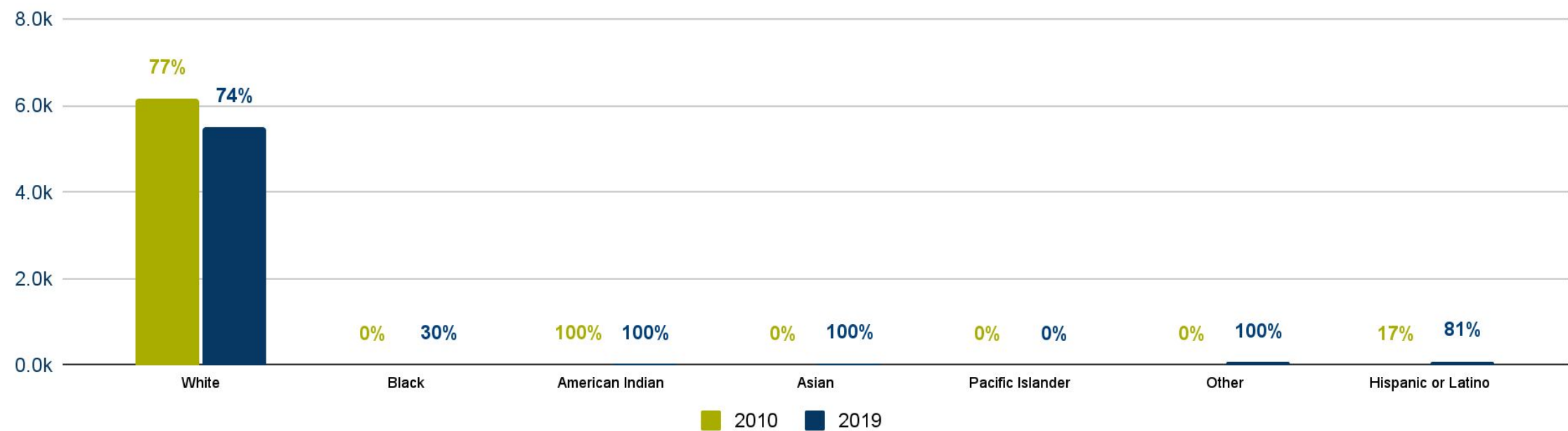
Sullivan County | 2010-2019



Source: ACS 2010-2019 5-year estimates

TENURE BY RACE | While the overall homeownership rate is 74%, homeownership is 74% among non-Hispanic White households, 30% for Black households, and 81% for Hispanic or Latino households.

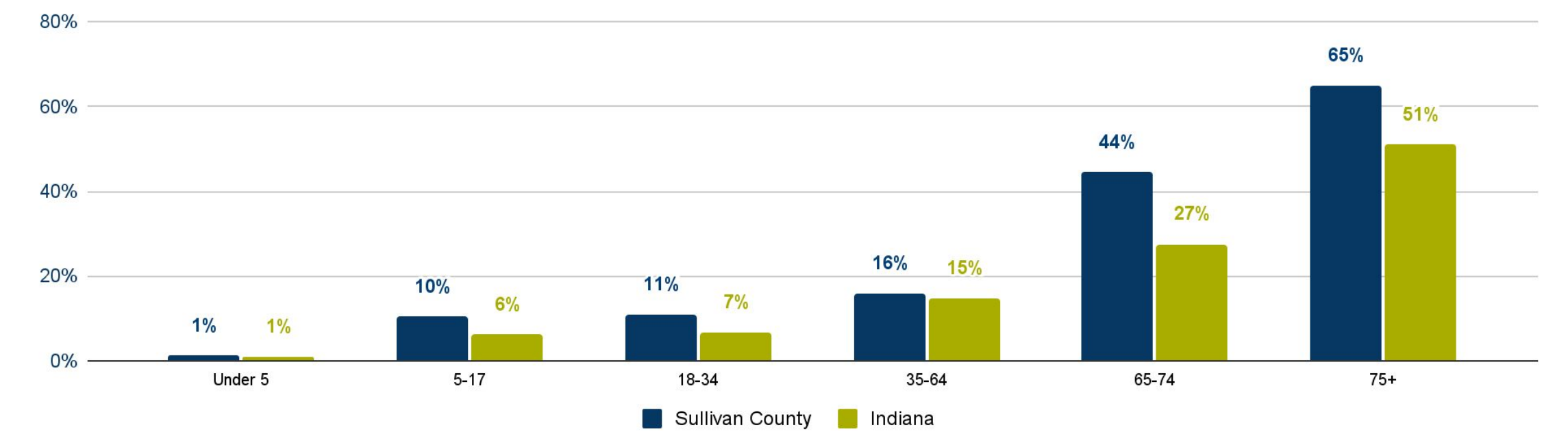
Homeownership by Race
Sullivan County | 2010, 2019



Source: ACS 2010-2019 5-year estimates

DISABILITY | 20% of people in Sullivan County live with a disability. For people above 65, the share increases to 53%.

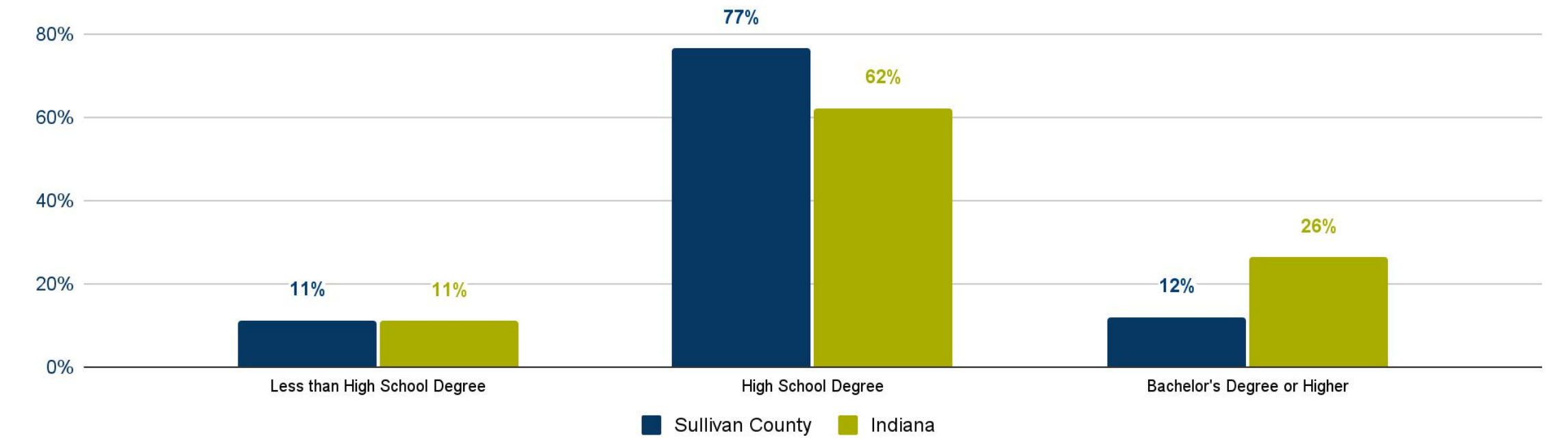
Share of the Population with a Disability by Age
Sullivan County, Indiana | 2010, 2019



Source: ACS 2010-2019 5-year estimates

EDUCATIONAL ATTAINMENT | In Sullivan County, 77% of the population has at least a high school degree and 12% of the population has at least a Bachelor's degree.

Educational Attainment
Sullivan County, Indiana | 2019

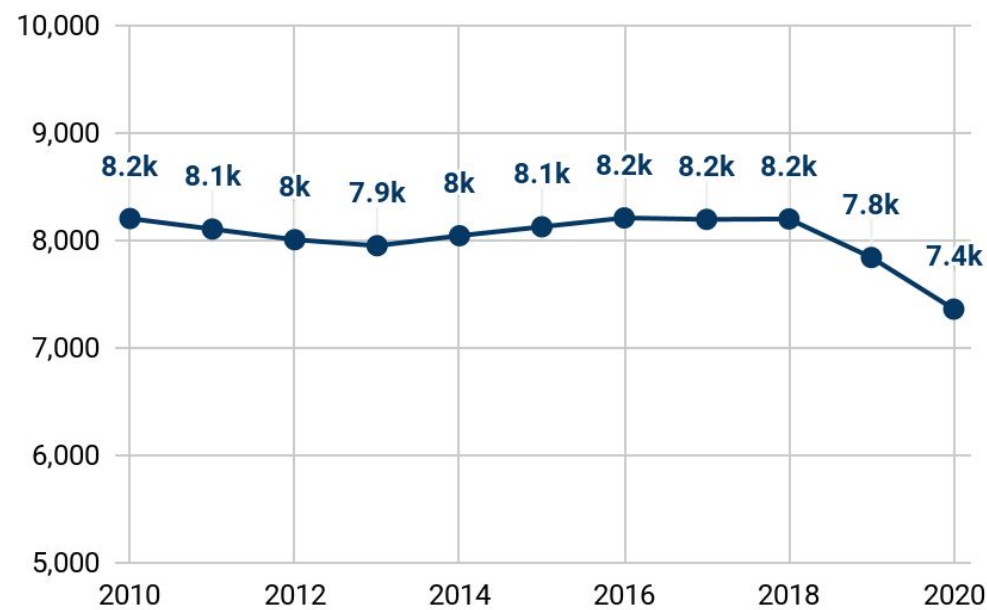


Source: ACS 2010-2019 5-year estimates

JOB / EMPLOYMENT TRENDS

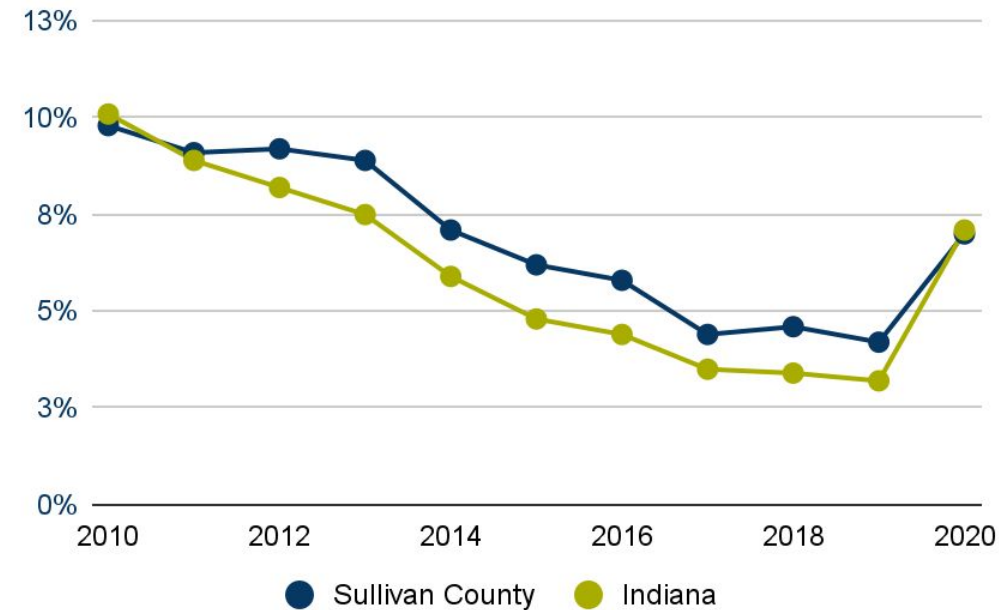
EMPLOYMENT BASE | There are currently 7,000 employed persons in Sullivan County, down by 10.30% since 2010. The unemployment rate in 2020 was 7.00%, up 2.80 points from 2019.

Total Employment
Sullivan County | 2010-2019



Source: ACS 2010-2019 5-year estimates

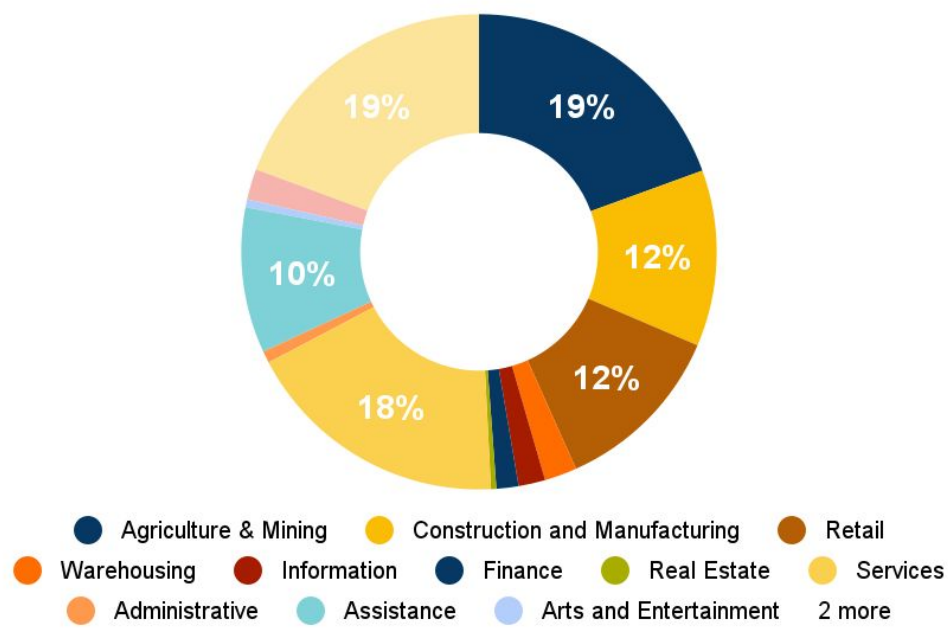
Unemployment Rate
Sullivan County, Indiana | 2010-2019



Source: ACS 2010-2019 5-year estimates

EMPLOYMENT BY INDUSTRY | Public Adminisntration accounts for the plurality of jobs in Sullivan County, accounting for 19% of all jobs, followed by Mining, Quarrying, and Oil and Gas Extraction (14% of all jobs).

Total Jobs by All Industries
Sullivan County | 2018



Source: Census, Longitudinal Employer-Household Dynamics, Primary Jobs, 2018

Top 5 Industries and Median Annual Wages

- 1. Service-providing | \$37,957
- 2. Trade, transportation, and utilities | \$46,717
- 3. Goods-producing | \$75,292
- 4. Professional and business services | \$34,450
- 5. Education and health services | \$38,899

Source: BLS

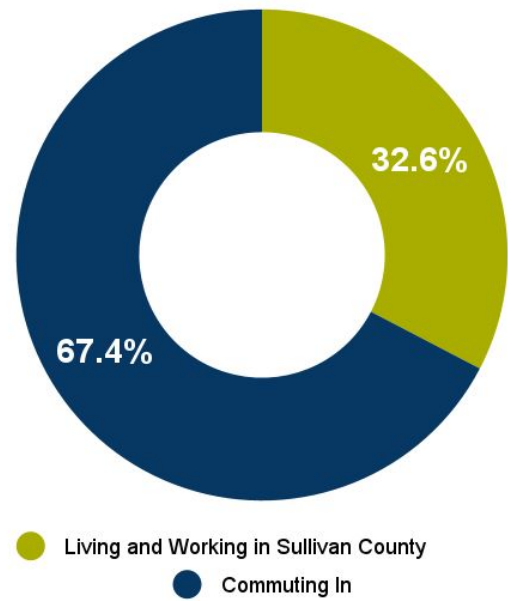
Top 5 Employers

- 1. Raybestos Powertrain Llc (Sullivan)
- 2. Hoosier Energy Rural Elec Co (Sullivan)
- 3. Peabody Energy Corp (Carlisle)
- 4. Peabody Energy Corp (Sullivan)
- 5. Sullivan County Community Hosp (Sullivan)

Source: BLS

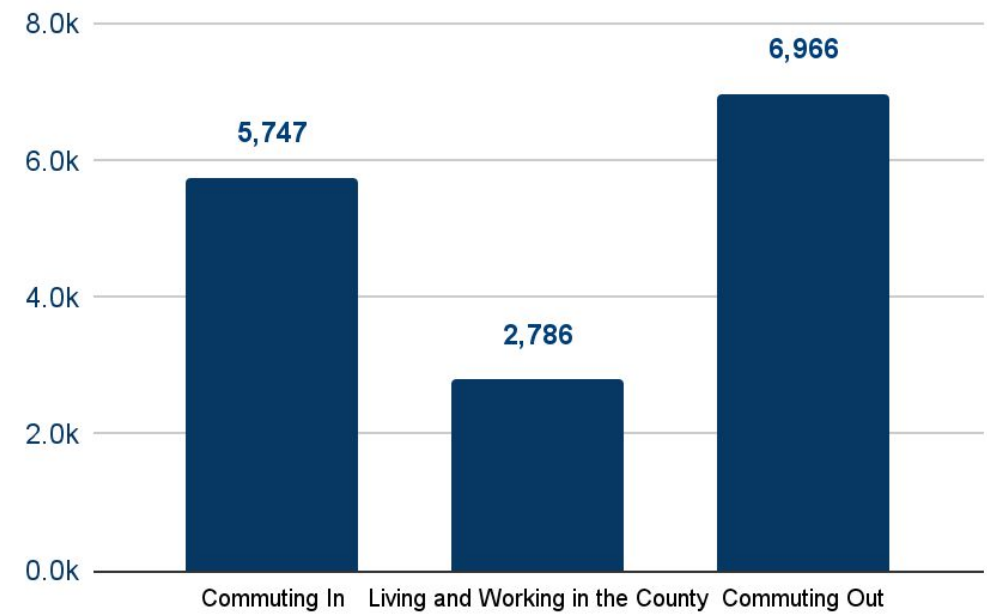
COMMUTER INFLOW / OUTFLOW | 6,000 commuters come into Sullivan County for their jobs, while 7,000 employees travel outside of Sullivan County for their jobs.

Employment Inflow
Sullivan County | 2018



Source: Census, Longitudinal Employer-Household Dynamics, Primary Jobs, 2018

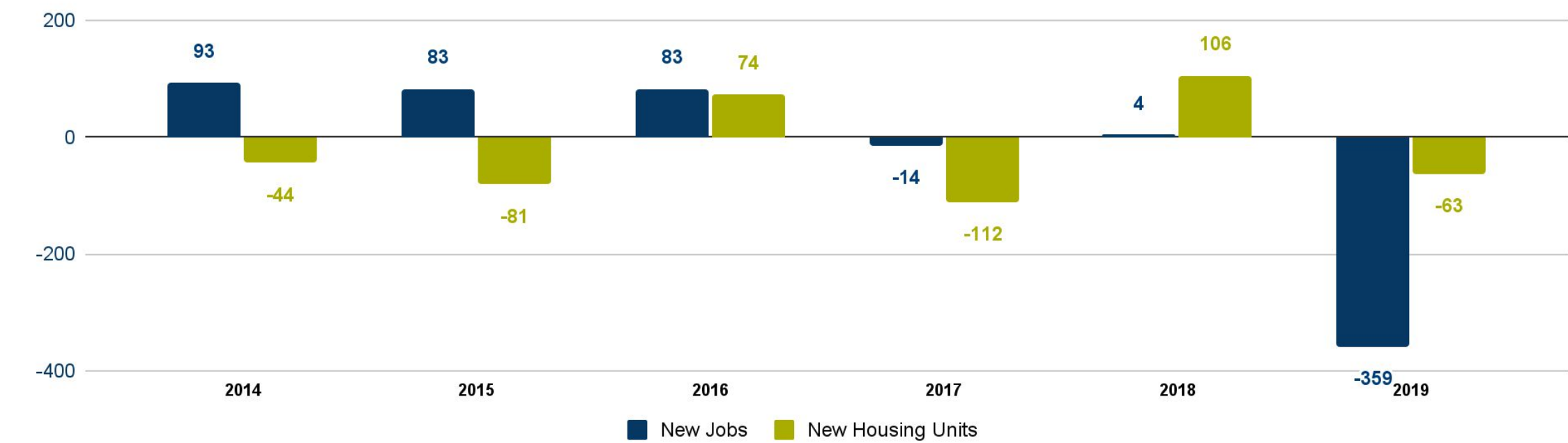
Commuting Patterns
Sullivan County | 2018



Source: Census, Longitudinal Employer-Household Dynamics, Primary Jobs, 2018

JOB GROWTH AND HOUSING PRODUCTION | Sullivan County has created -110 jobs between 2014-2019 and -120 housing units, or 109 units for every 100 jobs created.

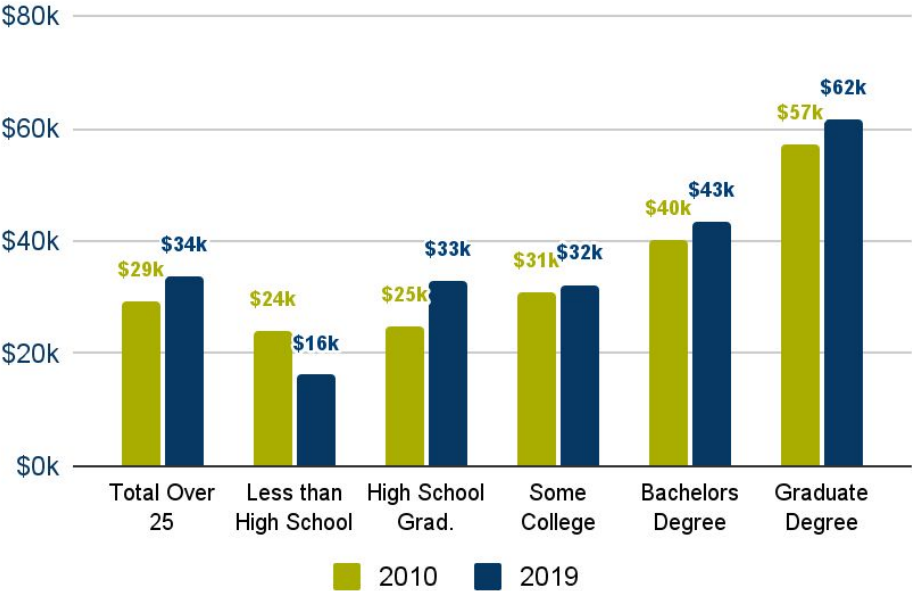
Job Growth and Housing Production
Sullivan County | Total Jobs, New Jobs



Housing Units Includes all existing units, single family and multifamily.
Source: ACS 2010-2019 5-year estimates

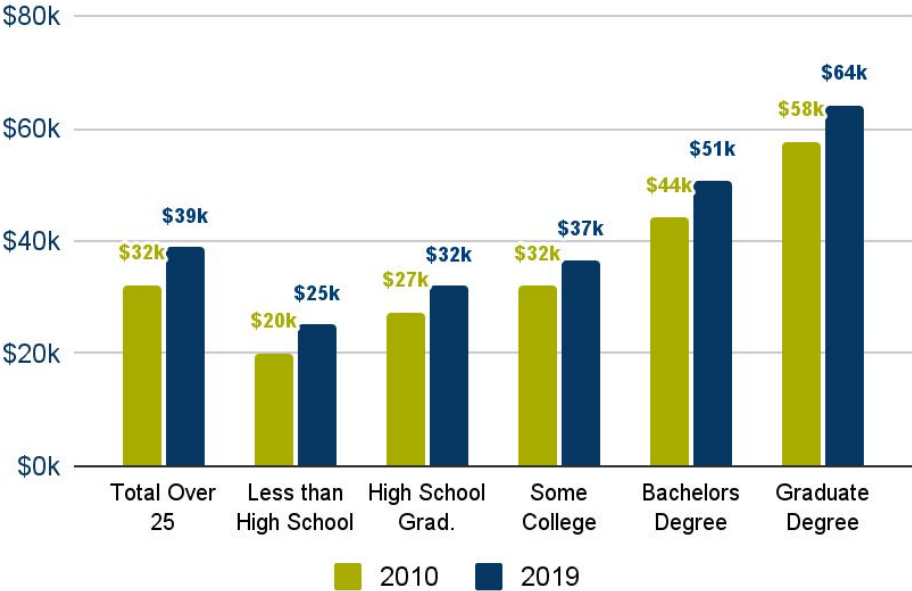
JOB GROWTH AND HOUSING PRODUCTION | Median earnings have increased 15% since 2010 for the total population and increased 33% for the population with at least a high school degree.

Median Earnings by Educational Attainment
Sullivan County | 2010, 2019



Source: ACS 2010-2019 5-year estimates

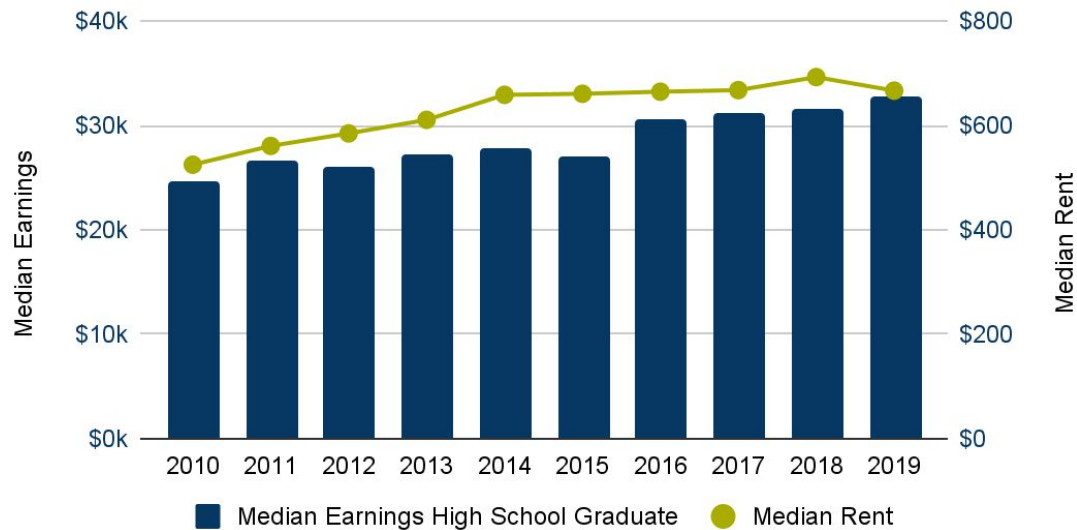
Median Earnings by Educational Attainment
Indiana | 2010, 2019



Source: ACS 2010-2019 5-year estimates

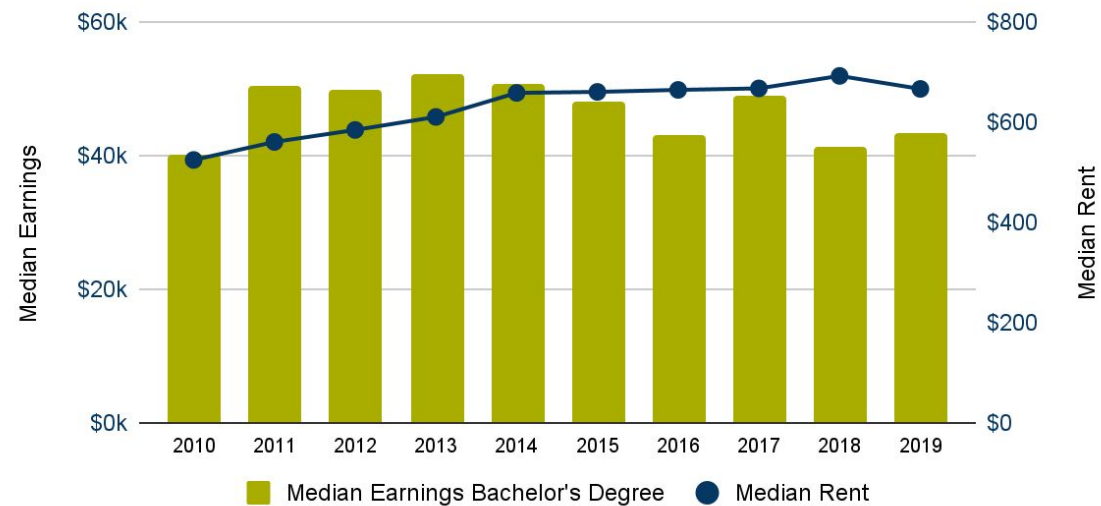
JOB GROWTH AND EDUCATIONAL ATTAINMENT | Median annual earnings have by increased \$4,500, or 17% since 2010 for high school graduates, and increased \$6,500, or 15%, since 2010 for Bachelors Degree holders. Median rent has increased 27.0%, or 27% since 2010.

Income and Rent Growth, High School Degree
Sullivan County | 2010-2019



Source: ACS 2010-2019 5-year estimates

Income and Rent Growth, BS Degree
Sullivan County | 2010-2019



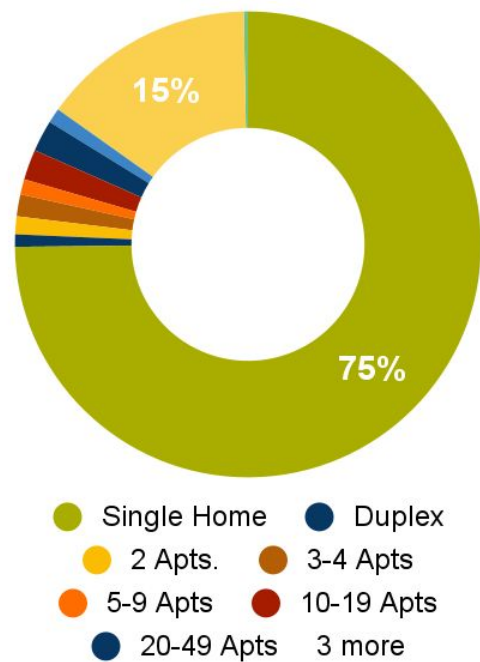
Source: ACS 2010-2019 5-year estimates

HOUSING TRENDS

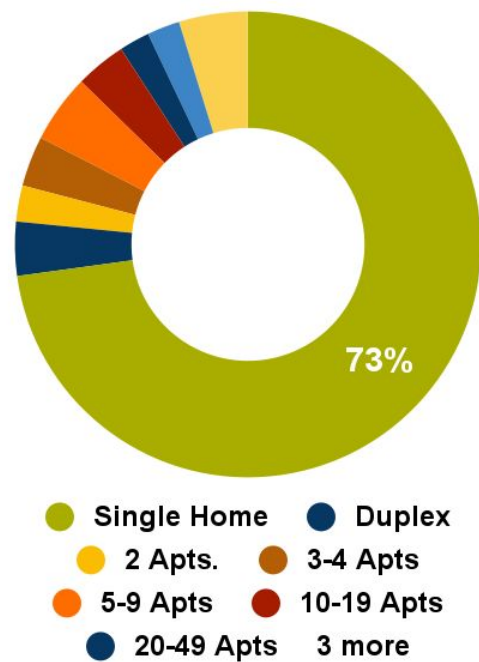
HOUSING TYPOLOGY | 75% of homes in Sullivan County are single-family, while 10% are multifamily. Multifamily housing has increased by 95 homes since 2010.

Housing Typology

Sullivan County | 2019



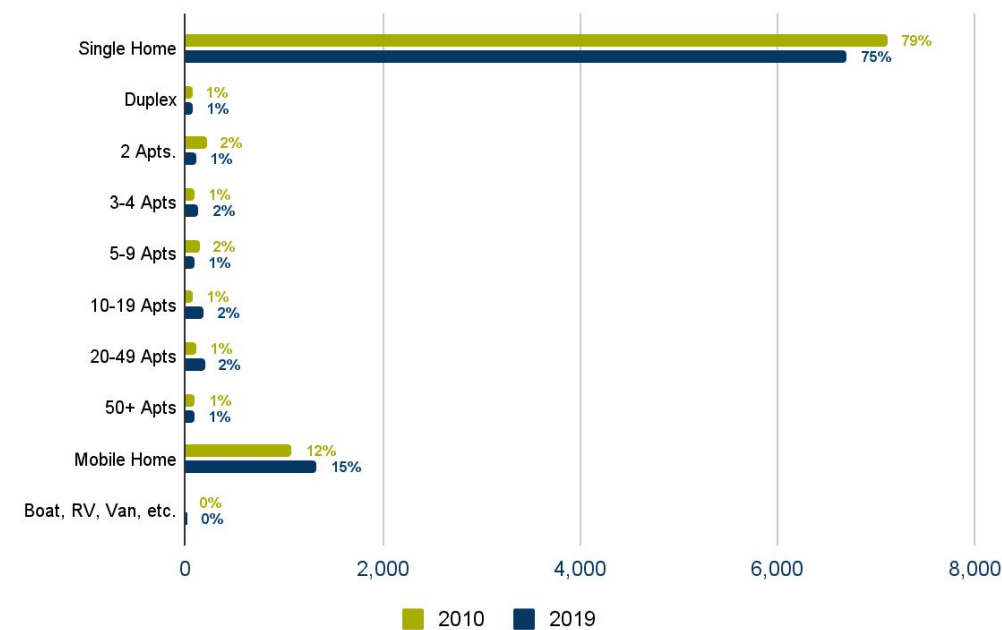
Indiana | 2019



Source: ACS 2010-2019 5-year estimates

Share of Units by Housing Typology

Sullivan County | 2010-2019



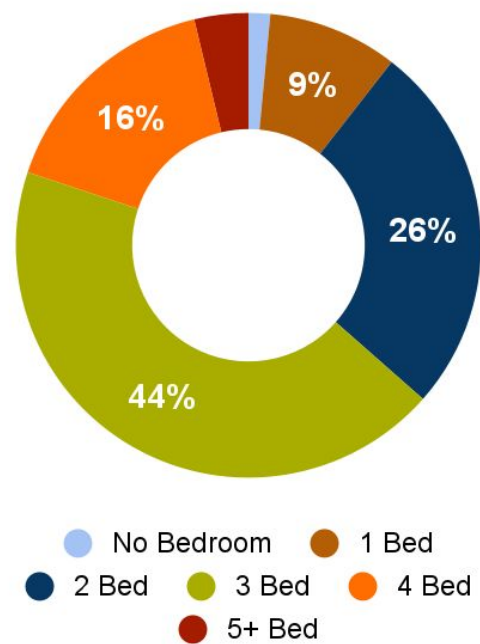
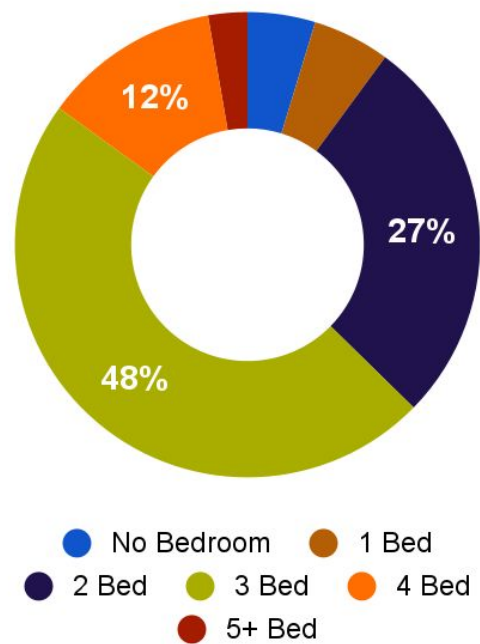
Source: ACS 2010-2019 5-year estimates

HOUSING TYPOLOGY | Most units in Sullivan County contain 2.43 bedrooms, with 63% of units containing 3 bedrooms or more.

Housing Stock by Bedrooms

Sullivan County | 2019

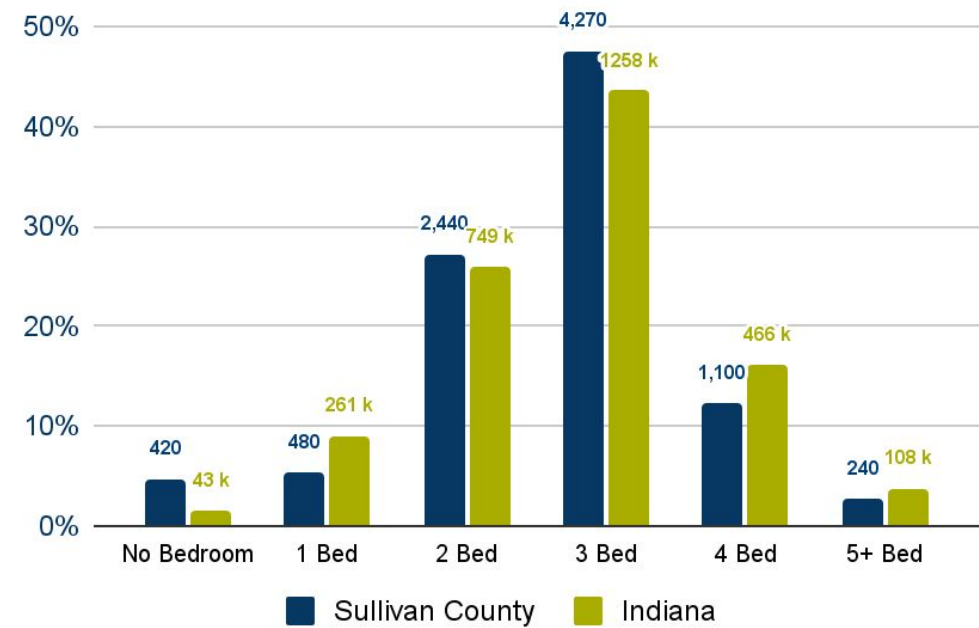
Indiana | 2019



Includes all existing units, single family and multifamily.
Source: ACS 2010-2019 5-year estimates

Share of Housing Stock by Bedroom

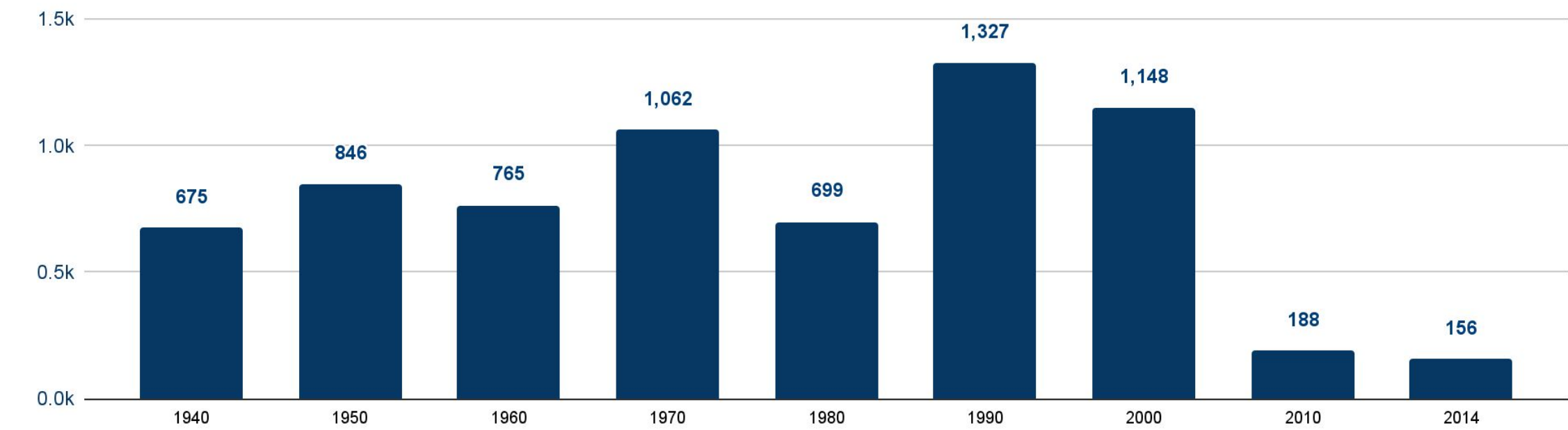
Sullivan County, Indiana | 2019



Source: ACS 2010-2019 5-year estimates

HOUSING AGE | 83% of homes were built before 1990, with a plurality of homes built before 1940.

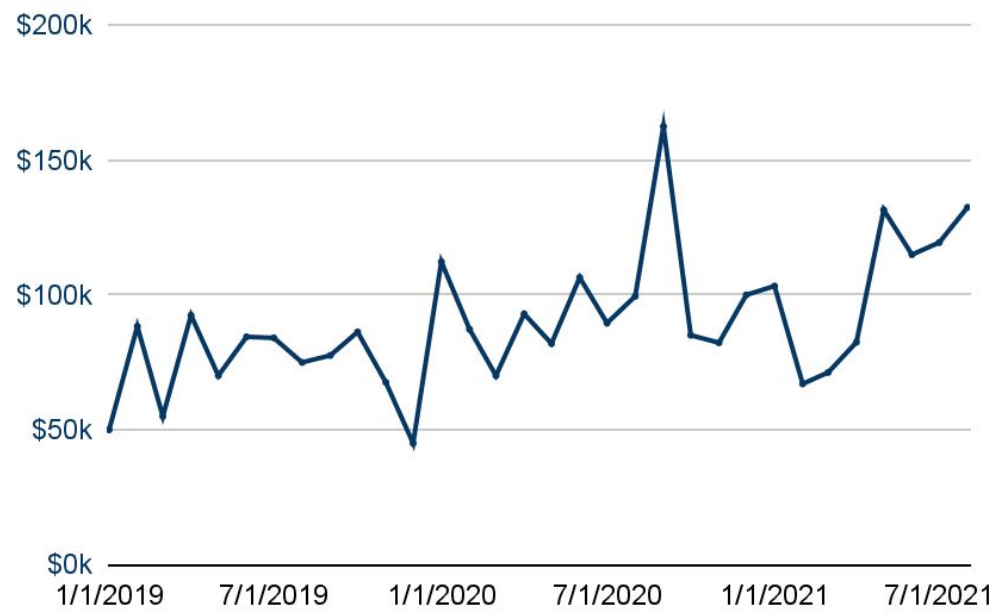
Homes by Year Built
Sullivan County | 2019



Includes all existing units, single family and multifamily.
Source: ACS 2010-2019 5-year estimates

MEDIAN LISTING PRICE | Homes in Sullivan County have a median listing price of \$132,450. Home prices have increased by 165% since 2019.

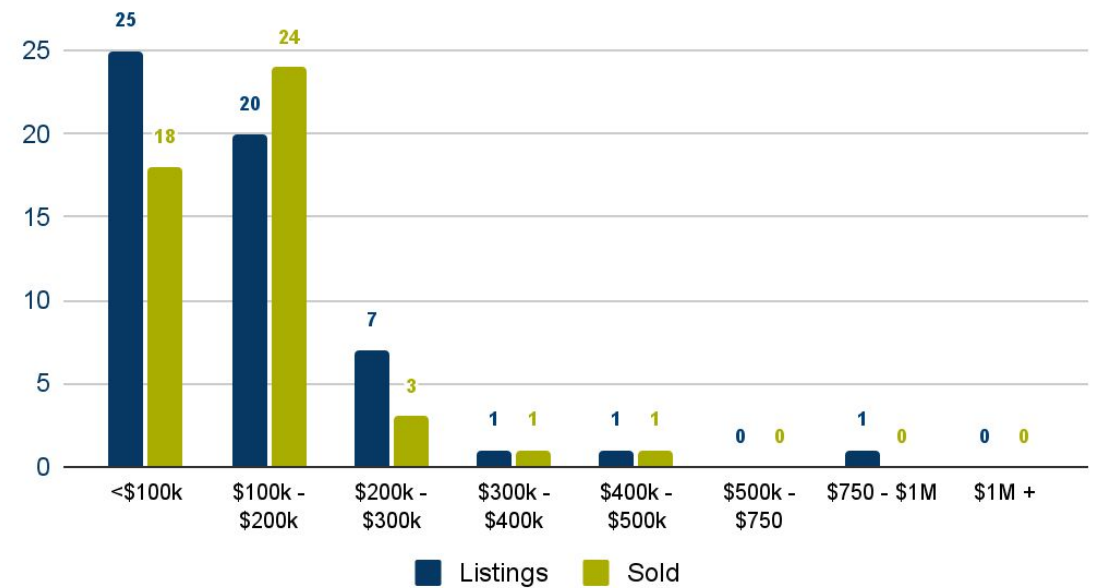
Median Listing Price
Sullivan County | 2019-2021



Source: ACS 2010-2019 5-year estimates

Disclaimer: For counties less than 10,000 households, data may be significantly skewed due to limited transactions.

Listings and Sales (last 24 months)
Sullivan County | 2021

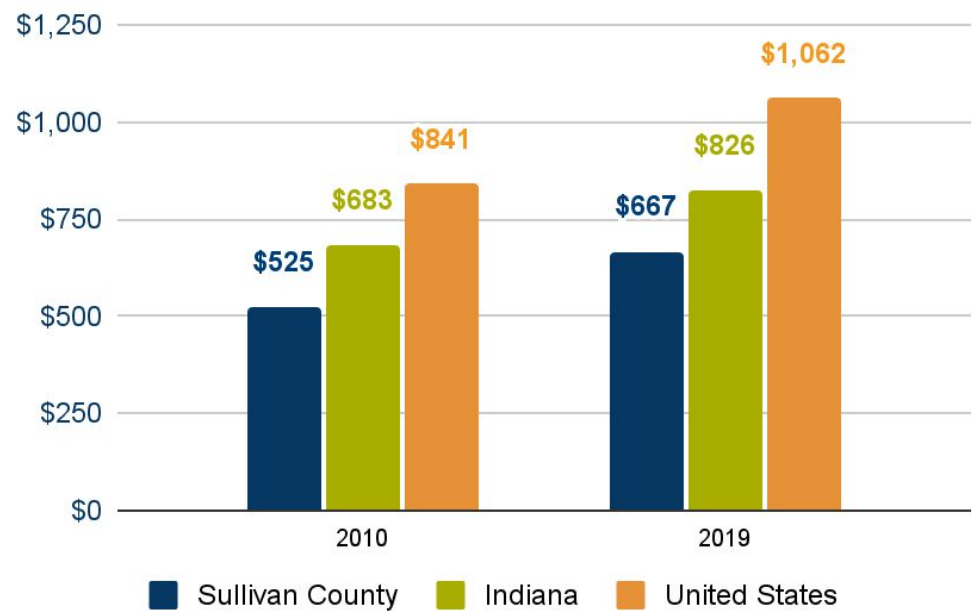


Source: ACS 2010-2019 5-year estimates

MEDIAN RENTS | Median rents have increased by 27% since 2010, with average rents at \$667 in 2019.

Median Rent

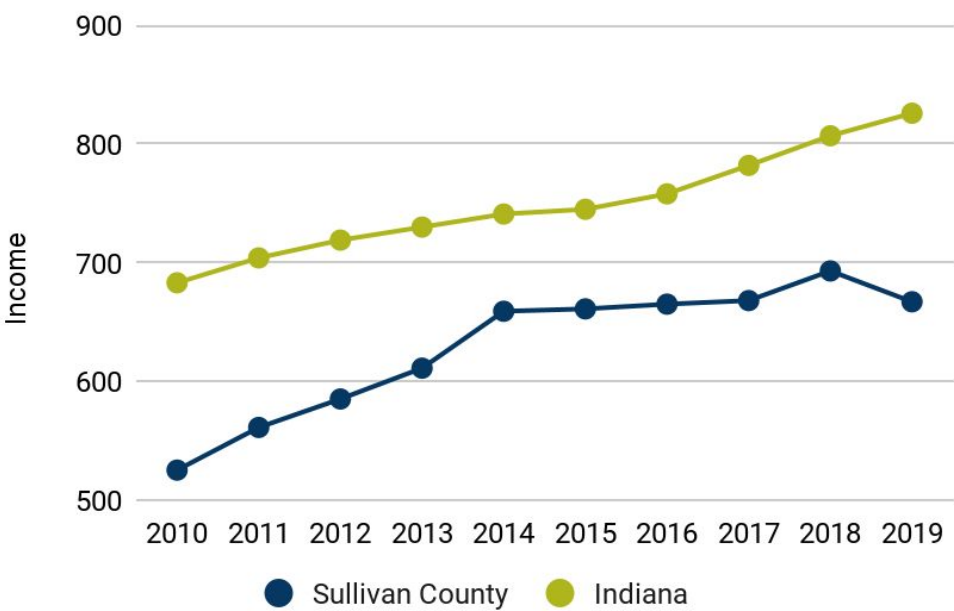
Sullivan County, Indiana | 2010, 2019



Source: ACS 2010-2019 5-year estimates

Median Rent Over Time

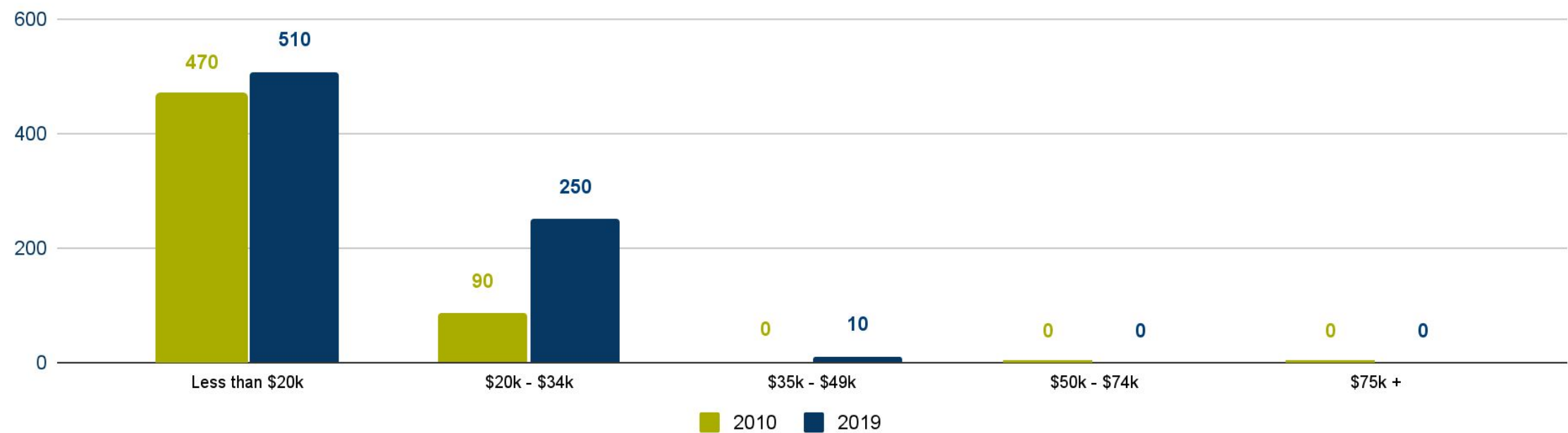
Sullivan County, Indiana | 2010 - 2019



Source: ACS 2010-2019 5-year estimates

COST BURDEN | 49% of renter households are housing cost burdened in Sullivan County, up 22% since 2010. 48% of households earning below \$50,000 are housing cost burdened.

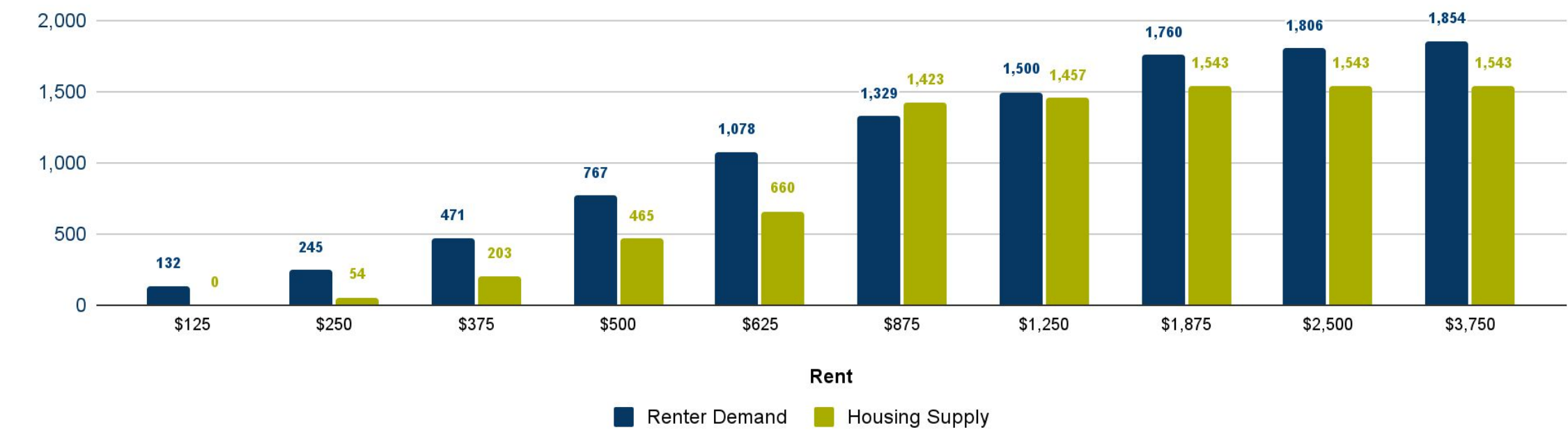
Renter Housing Cost Burden
Sullivan County, Indiana | 2010 - 2019



Cost Burdened households are those putting more than 30% of their household income towards housing expenses.
Source: ACS 2010-2019 5-year estimates

CUMULATIVE RENTAL HOUSING GAP | There is a 1000 unit gap in the renter market serving households who earn less than \$50,000 annually or units renting below \$1,250 per month.

Cumulative Housing Gap
Sullivan County, Indiana | 2010-2019

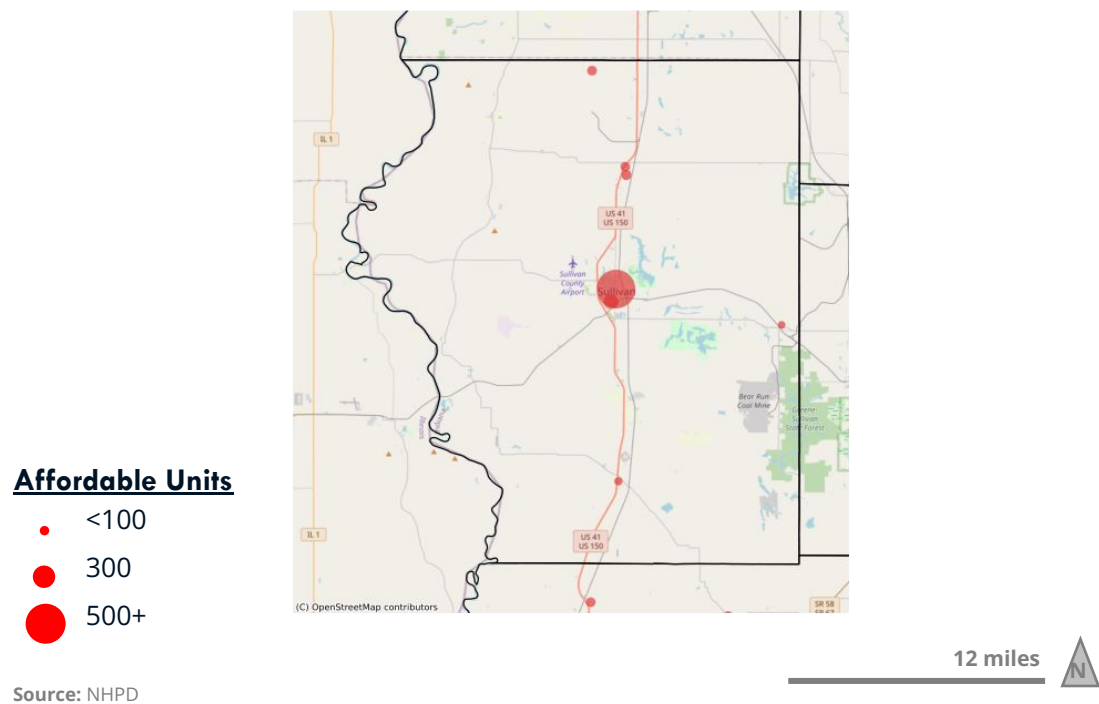


Rental Housing Gap is the number of households in each income group and number of existing housing units that are affordable to those households.
Source: ACS 2010-2019 5-year estimates

AFFORDABLE HOUSING | The maps below show the spatial distribution of affordable housing units throughout the state of Indiana and in Sullivan County.

Affordable Housing Inventory

Sullivan County | 2020



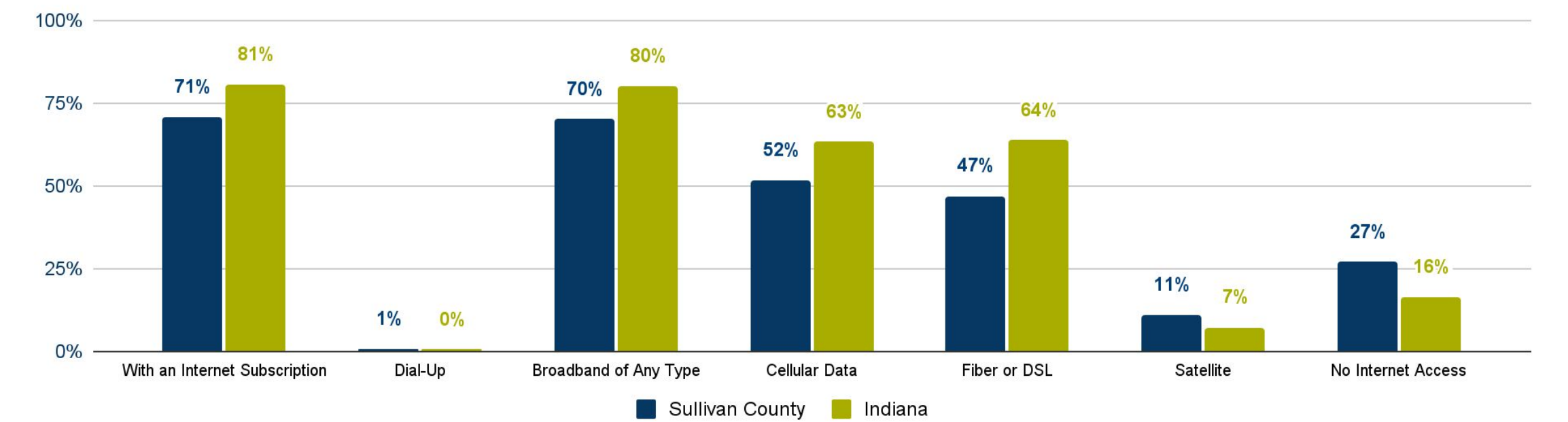
Affordable Housing Inventory

State of Indiana | 2020



HOUSING AMENITIES | 70% of housing units have access to broadband compared to 80% state-wide.

Broadband Access
Sullivan County | 2020

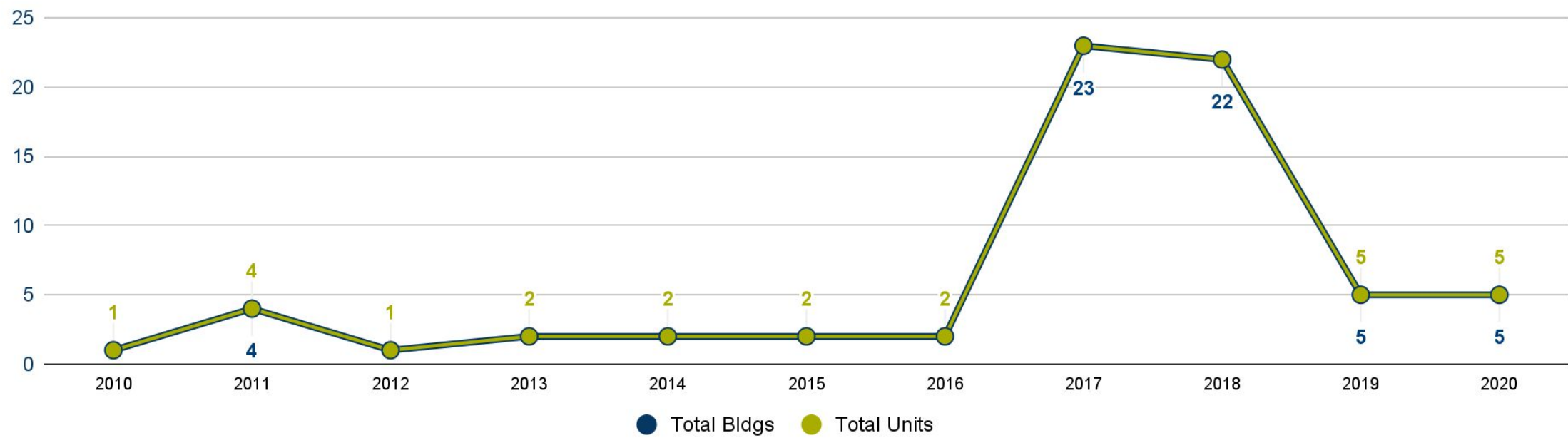


Source: ACS 2010-2019 5-year estimates

HOUSING CONSTRUCTION

HOUSING STARTS | There were 5 new housing starts in 2020 in Sullivan County, with 69 total building permits authorized since 2010.

New Housing Structures Authorized by Building Permits
Sullivan County | 2017-2020



Source: St. Louis Fed.

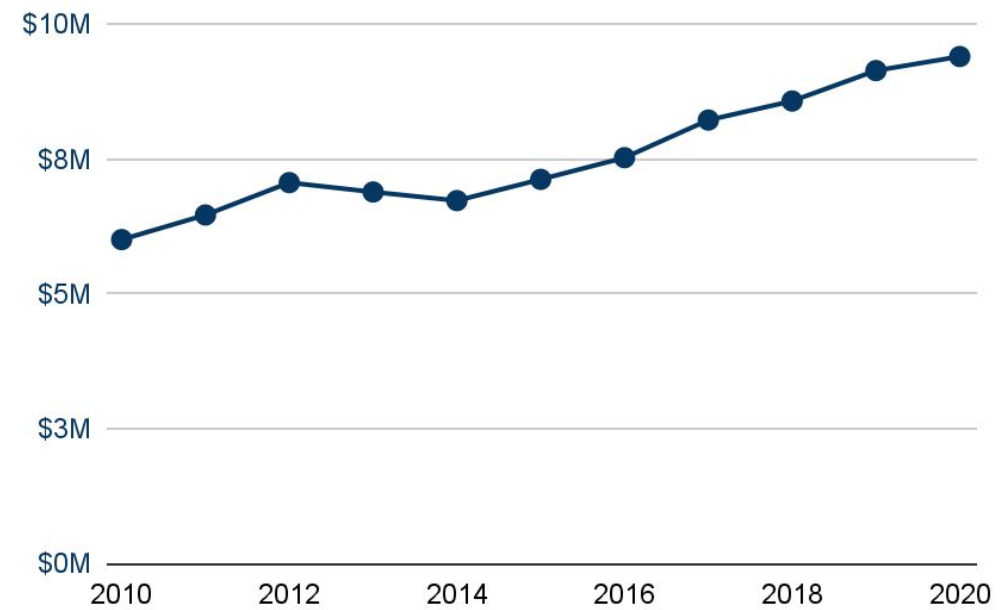
CONSTRUCTION INPUTS | Construction material costs have skyrocketed since 2010 and recovered sharply from pandemic impacts to all time highs.

Construction Cost Indices
United States | 2010-2021



Source: BEA, St. Louis Fed, U.S. Bureau of Labor and Statistics

Gross Construction Wages
Indiana | 2010-2020



Source: BEA, St. Louis Fed, U.S. Bureau of Labor and Statistics