National Alliance to End Homelessness

Preliminary 2026 National PIT Estimate

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1. Summary

A Point-in-Time (PIT) count is a local census of sheltered and unsheltered people experiencing homelessness on a single night in January, required by the U.S. Department of Housing and Urban Development (HUD). Continuums of Care (CoCs), the regional or local planning bodies that coordinate housing and services for people experiencing homelessness, organize the counts: HUD requires the sheltered count every year and the unsheltered count every other year. HUD compiles the results into its Annual Homeless Assessment Report (AHAR), which policymakers, advocates and other stakeholders use to track trends, guide funding and gauge progress toward ending homelessness.

HUD's official 2026 AHAR Part 1 has not been released. NAEH requested a rigorous analysis to generate a preliminary national estimate, so that policymakers, advocates and the public have a credible figure while the official report is pending. Based on data from CoCs that have reported 2026 counts, **we estimate that overall homelessness fell ~6.7% between 2025 and 2026, with a plausible range of roughly −8.0% to −5.8%** derived from validation of our method in prior years. That is ~49,000 fewer people across the 382 CoCs examined, from ~742,000 in 2025 to ~693,000 in 2026.

What is a plausible range? The range runs from our estimate minus the largest past overestimate to our estimate plus the largest past underestimate, based on six past year-to-year changes for which every CoC's count is known. It shows how far off the method has been before, not a statistical confidence interval (Sections 3.3 and 5.1).

Metric	2025–26 estimated change	Plausible range	CoCs reporting (of 382)	Share of 2025 count covered by reporting CoCs	Change, reporting CoCs only
Overall total	**−6.7%**	**−8.0% to −5.8%**	**261**	**90%**	**−6.6%**
Sheltered	−7.6%	−9.0% to −7.0%	261	88%	−7.7%
Unsheltered	−4.9%	−6.1% to −3.3%	261	92%	−4.7%
Special populations					
Veterans	−7.8%	−8.9% to −6.6%	214	67%	−6.8%
Chronic homelessness	+1.0%	−0.7% to +3.5%	195	69%	+1.5%

Sheltered homelessness fell more (−7.6%) than unsheltered homelessness (−4.9%). Veteran homelessness fell slightly more than overall homelessness (−7.8%), and chronic homelessness was roughly flat (+1.0%), with a plausible range that includes no change. The estimates should be read as preliminary and may change as more CoCs report.

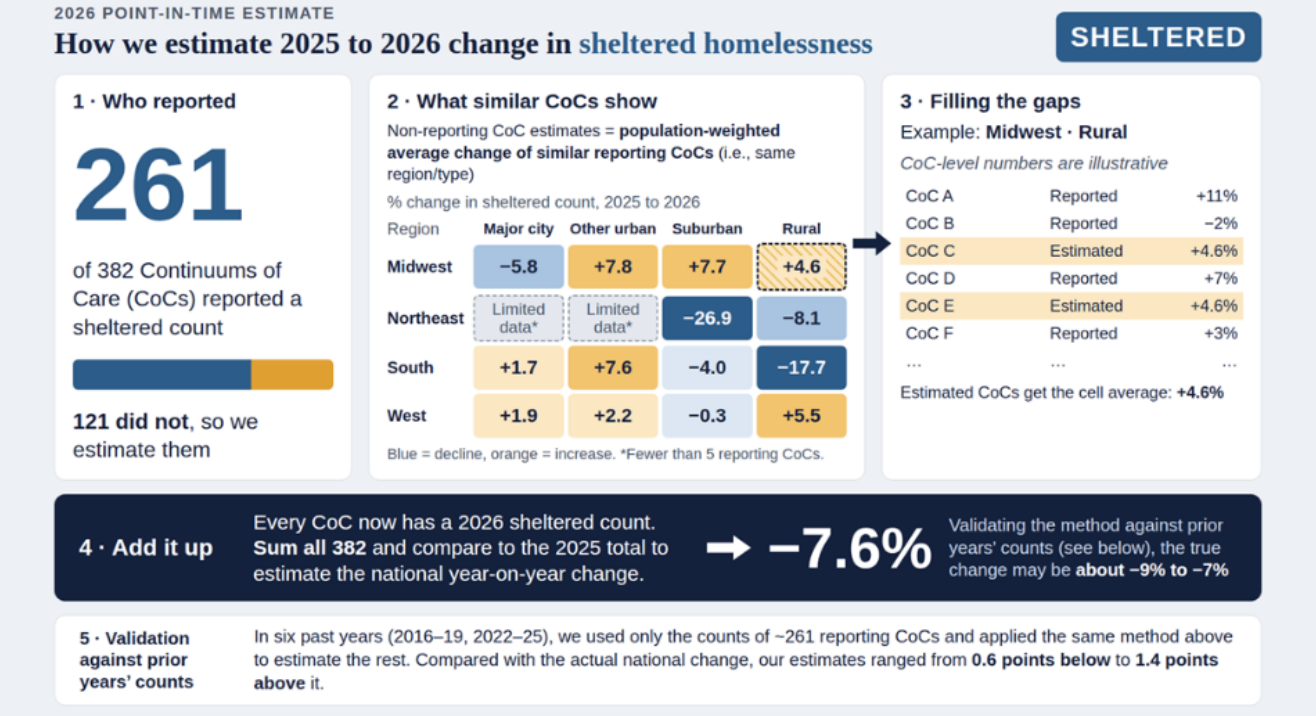
For overall, sheltered and unsheltered homelessness, the estimate combines reported 2026 counts from 261 CoCs with estimates for the 121 CoCs that have not yet reported. The reporting CoCs account for 88.4% of the 2025 sheltered count and 92.0% of the 2025 unsheltered count (Section 3.1); 14.8 points of the unsheltered share come from carried-forward counts, so new 2026 unsheltered counts cover about 77% of the 2025 unsheltered count. Each non-reporting CoC is assumed to have exhibited the same year-on-year percentage change as reporting CoCs of the same region and CoC type. Veteran and chronic homelessness, which are counted within the sheltered and unsheltered totals, are estimated using the same method, although fewer CoCs report them. Estimates for other populations reported in the AHAR, including individuals, people in families, youth, parenting youth, age groups and race/ethnicity, are not provided because available data did not support reliable estimates (Section 3.4).

We tested our approach for estimating the five metrics above by applying the method to six past year-to-year changes for which every CoC's result is known, estimating the method's error for each metric in each period. For each metric, the plausible range extends the 2026 estimate downward by the largest past overestimate and upward by the largest past underestimate, and reflects past accuracy, not a statistical confidence interval. The ranges do not capture error in the preliminary 2026 counts themselves (Sections 3.3 and 5.1). For overall homelessness, the national estimate was never overestimated by more than 1.3 points or underestimated by more than 0.8 points. The range for chronic homelessness is the widest because past errors were largest for this metric. It includes no change, so the estimate does not show whether chronic homelessness rose or fell.

Section 2 provides a one-page overview of the method used to generate the estimates in the table above and Section 3 describes the method in detail, including validation against prior years. Section 4 shows that a small number of CoCs with large drops account for a substantial share of the overall decline: replacing their reported changes with the average change of similar CoCs narrows the estimated decline to ~4.3%. Section 5 covers additional considerations and future extensions.

2. Method at a glance

Every CoC is assigned a 2026 count: reporting CoCs use their own, and the rest are assigned their 2025 count adjusted by the average change of similar reporting CoCs (same region and CoC type). The steps below use the sheltered count as the example.



1. **Who reported.** 261 of 382 CoCs reported a sheltered count. The other 121 did not and are therefore estimated.
2. **What similar CoCs show.** CoCs are grouped into 16 cells (four Census regions — Northeast, Midwest, South, West — by four HUD CoC types: major city, other largely urban, largely suburban, largely rural). For each cell we calculate the population-weighted average 2025–26 change of the reporting CoCs in that cell, weighting each CoC by its own 2025 count, so a CoC with twice the 2025 count of another has twice the influence on the cell average.
3. **Estimating non-reporting CoCs.** A non-reporting CoC's 2026 count is its 2025 count multiplied by one plus its cell's average change. Cells with fewer than 5 contributing CoCs (reporting CoCs whose changes set the averages; see Section 3.1) are still used in the estimates, but their average changes are not reported (marked "limited data").
4. **National total.** Summing all 382 CoCs' 2026 counts and comparing with the 2025 total yields the national change.
5. **Validation against prior years.** Applied to six past year-to-year changes, the method's national estimate of overall homelessness was never overestimated by more than 1.3 points or underestimated by more than 0.8 points (Section 3.3).

3. Method in detail

3.1 Data and sample

The analysis covers 382 CoCs in the 50 states and DC; Guam, Puerto Rico and the Virgin Islands are excluded for lack of historical data. All 2025 baselines are HUD's published AHAR figures, so every

CoC is measured on the same basis. The 2026 values come from counts that CoCs submitted to NAEH and from published sources, such as local reports and dashboards.

For each metric, CoCs fall into three groups. Every reporting CoC's own count is included in the national total. What differs is whether its change also contributes to the averages used to estimate non-reporting CoCs. The table splits the reporting CoCs that do not contribute into two columns by reason (see below).

Metric	Reporting, used to estimate others	Reporting, not used to estimate others		Not reporting (estimated)	Total
		Carried forward or repeated 2025 value	Incomplete history		
Sheltered	255	3	3	121	382
Unsheltered	227	32	2	121	382
Veterans	180	32	2	168	382
Chronic	164	29	2	187	382

The overall total is the sum of sheltered and unsheltered, so the total has no separate groups.

Carried-forward and repeated counts. Some CoCs reported a 2026 count identical to their 2025 count. For unsheltered homelessness, HUD allows CoCs to carry forward the prior year's count when a new count is not required, and we treat an identical unsheltered count the same way. For other measures, such as sheltered homelessness, an identical number is a repeated 2025 value. Neither indicates how homelessness changed in that community. Including them would bias the averages toward zero, so we do not use these CoCs to estimate others. When a CoC's unsheltered count is carried forward, we also carry forward its veterans and chronic counts, because without a new unsheltered count its 2026 figures for these groups are not comparable with its full 2025 counts and would overstate the decline. Most of the non-contributing CoCs for veterans (25 of 32) and chronic homelessness (27 of 29) are of this kind. For unsheltered homelessness, carried-forward counts make up 32 of the 34 reporting CoCs that do not contribute.

Incomplete reporting history. We tested the method against six past year-to-year changes (2016–17, 2017–18, 2018–19, 2022–23, 2023–24 and 2024–25), which requires CoCs with data in every one of those years. Only CoCs with a complete history are used to estimate others.

Non-reporting CoCs. For sheltered and unsheltered, 121 CoCs have no usable comparable 2026 value. Most had neither submitted a 2026 count to NAEH nor published one in a source we could find at the time of this analysis. Four reported counts that are not comparable with 2025: two changed their counting methodology and two changed their boundaries. A CoC is treated as non-reporting if its 2026 count does not cover the same geography or use the same methodology as its 2025 count. A CoC that merged but reported on its prior boundary is classified as reporting, because its 2025 and 2026 counts remain comparable.

Coverage. Reporting CoCs account for 88.4% of the 2025 sheltered count, 92.0% of unsheltered, 67.0% of veterans and 68.8% of chronic. Of the 92.0% for unsheltered, 14.8 points are attributable to carried-forward counts. Among reporting CoCs alone, the 2025–26 change was −7.7% for sheltered, −4.7% for unsheltered, −6.8% for veterans and +1.5% for chronic, within about one point of the national estimates, so the national estimates are not driven by the model's estimates for non-reporting CoCs.

3.2 Modeling approach

For each CoC without a usable 2026 count, the model assumes the same percentage change as comparable reporting CoCs (same region and CoC type), and sums all 382 CoCs. We define comparable CoCs by region and CoC type because that grouping produced the lowest average validation error across all five reported metrics (see "Specification choice" in Section 3.3). The model is run separately for sheltered, unsheltered, veterans, and chronic homelessness (the overall total is the sum of the first two), using the steps in Section 2.

What similar CoCs show. The reporting CoCs that are used to estimate others set the averages. For each of the 16 cells (Census region by HUD CoC type, defined in Section 2), we take the average 2025–26 percent change of these contributing CoCs, weighting each by its own 2025 count so that larger CoCs receive greater weight. If a cell has no contributing reporting CoCs, we use the region-wide average instead. Cells with at least one but fewer than 5 contributing CoCs still use their own average; we do not report those averages in this memo, because they are based on too few CoCs to interpret on their own.

Reporting CoCs that do not contribute. The remaining reporting CoCs retain their own 2026 count, including carried-forward unsheltered, veterans and chronic counts and repeated 2025 values, but their changes are excluded from the averages (reasons in Section 3.1).

Estimating non-reporting CoCs. A non-reporting CoC receives its 2025 count times one plus its cell's average change.

National total. The national total is the sum of all 382 CoCs' 2026 counts: reported counts for all reporting CoCs, whether or not they contribute to the averages, and estimates for non-reporting CoCs. The national change compares this total with the 2025 total. The overall total is the sum of the sheltered and unsheltered totals.

3.3 Validation approach

The 2026 estimate cannot be verified directly, because the 2026 counts of the 121 non-reporting CoCs are unknown. We therefore tested the method on past years, for which every CoC's count is known and the estimate can be compared with the actual national change. In six past year-to-year changes, the method's national estimate of overall homelessness was never overestimated by more than 1.3 points or underestimated by more than 0.8 points. The paragraphs below describe

the test design, the plausible range that follows from these errors, and tests of the method's specification and of the assumption that non-reporting CoCs exhibit annual trajectories similar, on average, to those of reporting CoCs.

Test design. For each of 2016–17, 2017–18, 2018–19, 2022–23, 2023–24 and 2024–25, we treated the CoCs with complete data as the reporting CoCs, estimated every other CoC with the method in Section 3.2, and compared the resulting national change with the actual national change. We excluded 2019–22 because of the pandemic. The error is the estimated change minus the actual change, in percentage points. A negative error means the estimated change was lower than the actual change; when both are negative, the method overstated the size of the decline. In each test, the cell averages are weighted by each CoC's count in that test's starting year, mirroring how the 2026 estimate weights by 2025 counts. CoCs whose boundaries changed in a given year are excluded from that year's test, so slightly fewer CoCs set the cell averages than in 2026 (counts by test are in the Appendix).

Metric	Average absolute error (pts)	Largest underestimate (pts)	Largest overestimate (pts)
Overall total	0.77	0.81	1.30
Sheltered	0.71	0.60	1.37
Unsheltered	0.91	1.57	1.20
Veterans	0.83	1.17	1.07
Chronic	1.28	2.50	1.71

Plausible range. The range in Section 1 reflects the largest errors observed when we tested our method against six past year-to-year changes. In those tests, the actual overall change was at most 1.30 percentage points below our estimate or 0.81 points above it. Applying those margins to our 2026 estimate of −6.65% produces a plausible range of −8.0% (-6.65 – 1.30) to −5.8% (-6.65 + 0.81). Six periods is a small sample, so the range reflects past accuracy and does not bound future error. The Appendix reports the estimated change, actual change and error for every metric and test period.

Specification choice. We evaluated nine versions of the method on the same six validation tests, grouping CoCs by region × CoC type, by region alone or by CoC type alone, each with equal weights or with weights that assign larger CoCs more influence (fixed at the first year of the test, or each CoC's own starting-year count, the version we use). Region × CoC type with starting-year weights had the lowest average error across the five reported metrics, 0.9 points (Appendix). Weighting larger CoCs more heavily in each average had the largest effect on accuracy: equal-weighted versions averaged 3.3 to 3.5 points of error, compared with 0.9 for the version we use.

Errors at the cell level. Errors within individual region × CoC-type cells are much larger than at the national level, typically 2 to 8 points. However, for each reported metric, the two cells with the largest errors together account for only 0.7% to 3.2% of the national count, which limits their effect

on the national estimate. Cell averages are best read as inputs to the national estimate, not as estimates of change within each cell.

Testing the similar-CoC assumption. The method assumes that non-reporting CoCs (as of 2026) exhibit annual trajectories similar, on average, to those of reporting CoCs. To test this assumption, we compared the average percent change of the CoCs that set the cell averages in each test (contributing CoCs) with that of all remaining CoCs, for each metric and each of the six validation periods. The two groups did not differ significantly in 27 of 30 metric-period tests; chance alone would produce one to two exceptions, and there were three (Appendix). The tests have limited power, however, and size-weighted comparisons indicate larger differences in 2022–23 and 2023–24, though the sheltered national estimates were still within 1.4 and 1.1 points of the actual change. We therefore treat the assumption as supported but not proven (Section 5).

3.4 Special populations

Beyond the overall, sheltered and unsheltered totals, we also assessed estimates for specific populations. These are harder to produce: fewer CoCs report them, and a national decline can mask different trends among subpopulations (in HUD's 2025 AHAR, overall homelessness fell about 3% while chronic homelessness and homelessness among individuals reached record highs). We applied the same method to each population and tested the method on the same six periods, and we report only those with adequate CoC coverage and validation errors comparable to the totals.

Reported: veteran and chronic homelessness. Coverage is lower, partly because published sources often report only totals and the sheltered/unsheltered split: reporting CoCs account for 67% of the 2025 veterans count and 69% of the chronic count, compared with 88% to 92% for sheltered and unsheltered, so more of each national figure is based on estimates. Validation errors for veterans were similar to those for the totals (average 0.83 points), while chronic homelessness had the largest errors of the five metrics (average 1.28 points), so its plausible range is the widest and includes no change (Section 1). Both are less certain than the overall total.

Not reported: individuals, people in families, youth and parenting youth. Available data did not support reliable national estimates for these groups, for two reasons. First, validation errors for families, youth and parenting youth were many times larger than for the reported metrics: about 4 points on average for people in families, 6 for youth and 12 for parenting youth, with single-year errors of 10 to 23 points. Second, individuals and people in families together make up the total count, so reporting individuals alone would allow a reader to derive the families figure by subtraction. Individuals had a low validation error (average 0.97 points), but we report both groups or neither.

Not tested: age and race/ethnicity. The AHAR also reports age and race/ethnicity breakdowns. We did not test these for validation errors because too few CoCs reported disaggregated 2026 counts, so we do not estimate them.

4. Sensitivity analysis: treating outlier CoCs as estimated

Very large changes in a few CoCs may reflect one-time events or idiosyncratic features of a particular count rather than broader trends. This section does not identify causes, but it does examine the sensitivity of our national estimate to CoCs with the largest changes, whatever their source.

Eight CoCs with very large local changes account for about 2.4 points of the overall decline; treating them as estimated instead of reported changes the overall estimate from −6.7% to −4.3%.

Outlier definition. A CoC is classified as an outlier in this analysis if its combined sheltered and unsheltered total changed by 40% or more between 2025 and 2026 and the CoC is a contributing reporting CoC for both sheltered and unsheltered. Classification depends only on the size of the change, not its cause; investigating causes is outside the scope of this memo (see Section 5.2). Because eligibility requires contributing status for both, CoCs that carried forward their unsheltered count, including the largest CoC, cannot be identified as outliers. Outlier CoCs are reclassified as estimated: they retain their 2025 count, receive their cell's average change in place of their own reported change, and no longer contribute to that average. No CoC is excluded from the national total. Eight CoCs are outliers, most of them in the Northeast.

Metric	Main estimate	With outlier CoCs estimated	Shift (pts)
Overall total	−6.65%	−4.26%	+2.39
Sheltered	−7.60%	−3.85%	+3.76
Unsheltered	−4.92%	−5.02%	−0.10
Veterans	−7.79%	−7.72%	+0.08
Chronic	+1.03%	+1.76%	+0.73

The difference between the two estimates is concentrated in a few cells. For sheltered, most of the outlier CoCs are concentrated in one cell, Northeast × largely suburban, which accounts for 93% of the difference. For unsheltered homelessness and veterans, the shift is close to zero (−0.10 and +0.08 points), so cell shares would not be meaningful. For chronic homelessness, the same Northeast × largely suburban cell accounts for 57% of the difference.

Cell (sheltered)	Contribution to difference (pts)	Share of difference
Northeast × largely suburban	+3.48	93%
Largely suburban, other regions	+0.28	7%
All other cells	0.00	0%
Total	**+3.76**	**100%**

All eight outlier CoCs are in the largely suburban type. About 79% of the sheltered difference results from replacing the outlier CoCs' own counts, and 21% from estimated CoCs in the same cells whose estimates change once the outlier CoCs no longer contribute to the cell average.

Accuracy in past years. We applied the same outlier rule to the six validation periods in Section 3.3. Treating the outlier CoCs as estimated did not produce more accurate national estimates for any of the five reported metrics. Average absolute error over the six periods was larger with the adjustment for overall (1.34 versus 0.77 points), sheltered (1.93 versus 0.71), unsheltered (1.78 versus 0.91), veterans (1.63 versus 0.83) and chronic homelessness (2.22 versus 1.28). The adjusted estimate is therefore a sensitivity check, not a replacement for the main estimate.

Frequency and concentration in past years. In each of the six validation periods, the outlier rule flagged 14 to 36 CoCs, compared with eight in 2026, so 2026 had fewer outlier CoCs than any validation period. What distinguishes 2026 is concentration: Northeast × largely suburban accounts for 93% of the difference in the sheltered estimate, the highest share for any cell in the five validation periods with a measurable sheltered shift. In three of those five periods, no cell accounted for more than 40% of the sheltered difference; in the other two, the largest cell accounted for 65% and 84%.

5. Considerations & Extensions

5.1 Considerations

The national estimates depend on assumptions that validation supports but cannot confirm. Our method assumes that non-reporting CoCs exhibit annual trajectories similar, on average, to those of reporting CoCs in the same region and CoC type, and that patterns observed in past years carry over to 2026. Validation is encouraging: reporting and non-reporting CoCs differed significantly in only 3 of 30 tests (Section 3.3), and the plausible range reflects six past year-to-year changes. However, six periods is a short record, the tests have limited power, and the range is not a ceiling on future errors. Errors for some metrics were somewhat larger after COVID than before, so the range may understate uncertainty in 2026. Alternative specifications, including state-level effects and adjustment for each CoC's own sheltered change, move the headline estimates by less than half a percentage point.

Counts are subject to measurement error. PIT counts are prone to such error, which may be correlated within regions and CoC types and would then carry into the cell averages used for non-reporting CoCs. The 2025 baseline is HUD's published count. The 2026 counts come from CoC submissions and published local sources that have not gone through HUD's AHAR quality assurance process, so errors may be larger than in 2025 and are not captured in the plausible range. For CoCs that did not count, our estimates may also differ from the values HUD uses for them in the official AHAR, for example if HUD carries forward their prior-year counts.

5.2 Extensions

Named-event sensitivity analyses. The outlier analysis in Section 4 is data-driven and does not identify the causes of the large changes in some CoCs. A natural next step is to identify CoCs affected by specific disruptions (immigration dynamics, natural disasters and rental housing cost shifts) using external data, such as asylum-seeker arrivals, FEMA disaster declarations, and the Zillow Observed Rent Index, and to rerun the national estimates with and without them. Comparing the two sets of estimates would indicate how sensitive the national estimate is to CoCs affected by such events.

Subpopulation deep dive. Validation errors for people in families, youth, and parenting youth were too large to support reporting, and individuals are withheld because reporting them would reveal the families figure (Section 3.4). A follow-on analysis could decompose those errors by region × CoC-type cell to determine whether they are systematic or random, test whether they concentrate in communities affected by the events above, and identify which CoCs' subpopulation reporting would most improve future estimates, providing NAEH a basis for prioritizing data collection.

Appendix: Validation detail

Estimated and actual national change for each reported metric and validation period. The error is the estimated change minus the actual change, in percentage points. "CoCs used" is the number of contributing CoCs that set the cell averages in that test, after boundary-change exclusions. The overall total is the sum of the sheltered and unsheltered totals, so the total has no separate CoC count. Errors are computed from unrounded values.

Metric	Period	Actual change (%)	Estimated change (%)	Error (pts)	CoCs used
Overall total	2016–17	0.55	0.29	−0.26	—
	2017–18	0.25	0.98	0.73	—
	2018–19	2.63	1.82	−0.81	—
	2022–23	12.47	13.77	1.30	—
	2023–24	18.22	18.96	0.73	—
	2024–25	−3.36	−4.17	−0.81	—
Sheltered	2016–17	−3.03	−3.21	−0.19	252
	2017–18	−0.51	0.08	0.59	254
	2018–19	−0.59	−1.00	−0.41	255
	2022–23	13.84	15.21	1.37	254
	2023–24	25.48	26.62	1.14	254
	2024–25	−3.65	−4.25	−0.60	254

Metric	Period	Actual change (%)	Estimated change (%)	Error (pts)	CoCs used
Unsheltered	2016–17	8.10	7.68	−0.41	224
	2017–18	1.72	2.73	1.00	226
	2018–19	8.67	7.10	−1.57	227
	2022–23	10.39	11.58	1.20	226
	2023–24	6.91	7.02	0.11	226
	2024–25	−2.83	−4.03	−1.20	226
Veterans	2016–17	1.81	0.66	−1.15	177
	2017–18	−5.41	−4.78	0.63	179
	2018–19	−2.19	−2.81	−0.62	180
	2022–23	7.53	7.88	0.35	180
	2023–24	−7.68	−6.61	1.07	180
	2024–25	−1.26	−2.43	−1.17	179
Chronic	2016–17	11.61	13.32	1.71	161
	2017–18	1.51	0.28	−1.23	164
	2018–19	9.48	6.99	−2.50	164
	2022–23	11.50	13.04	1.54	164
	2023–24	8.86	8.29	−0.58	164
	2024–25	0.79	0.69	−0.11	163

Contributing versus other CoCs. The three metric-period tests (of 30, including six for overall homelessness) in which contributing and other CoCs differed significantly ($p < 0.05$). None of the six overall tests was significant. Values are the average percent change in the homeless count across the CoCs in each group. “Contributing” CoCs are those that set the cell averages in that test; “other” CoCs are all remaining CoCs in the same test.

Metric	Period	Contributing CoCs: average change in count (%)	Other CoCs: average change in count (%)
Sheltered	2022–23	14.3	6.3
Unsheltered	2023–24	28.3	59.0
Veterans	2023–24	4.5	26.0

Specification comparison. Average absolute error (points) over the six validation periods for nine versions of the method, best first by the five-metric average. “Region × type” groups CoCs by region and CoC type; weights are equal, fixed at the first year of the test window, or each CoC’s own starting-year count (“starting-year”, the version used).

Grouping and weights	Overall	Sheltered	Unsheltered	Veterans	Chronic	Average
Region × type, starting-year (used)	0.77	0.71	0.91	0.83	1.28	0.90
Region × type, fixed	0.76	0.65	0.97	1.25	1.58	1.04
Type only, fixed	0.60	0.55	0.83	1.32	2.12	1.08
Type only, starting-year	0.66	0.65	0.93	1.01	2.72	1.20
Region only, fixed	0.97	1.02	0.95	1.56	1.60	1.22
Region only, starting-year	1.12	1.23	1.06	1.06	2.03	1.30
Type only, equal	1.55	0.82	3.07	2.98	8.15	3.31
Region × type, equal	1.46	0.87	2.61	3.63	8.03	3.32
Region only, equal	1.44	0.81	2.73	4.22	8.48	3.53