PREPARED FOR:
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HOUSING NEEDS ASSESSMENT & MARKET ANALYSIS STUDY

Bath County, VA

MARCH 2020

PREPARED BY:

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ABOUT CAMOIN 310

Camoin 310 has provided economic development consulting services to municipalities, economic development agencies, and private enterprises since 1999. Through the services offered, Camoin 310 has had the opportunity to serve EDOs and local and state governments from Maine to California; corporations and organizations that include Lowes Home Improvement, FedEx, Amazon, Volvo (Nova Bus) and the New York Islanders; as well as private developers proposing projects in excess of $6 billion. Our reputation for detailed, place-specific, and accurate analysis has led to projects in 40 states and garnered attention from national media outlets including Marketplace (NPR), Forbes magazine, The New York Times and The Wall Street Journal. Additionally, our marketing strategies have helped our clients gain both national and local media coverage for their projects in order to build public support and leverage additional funding. We are based in Saratoga Springs, NY, with regional offices in Portland, ME; Boston, MA; Richmond, VA and Brattleboro, VT. To learn more about our experience and projects in all of our service lines, please visit our website at **www.camoinassociates.com**. You can also find us on Twitter **@camoinassociate** and on **Facebook**.

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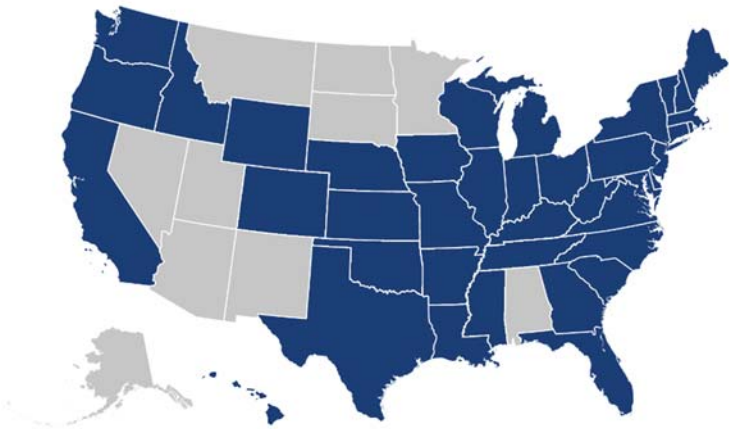

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We would like to acknowledge the Bath County Housing Steering Committee for their efforts in helping to oversee this project:

- Janet Bryan, Bath County
- Ashton Harrison, Bath County
- Tracy Hibbitts, Central Shenandoah Planning District Commission
- Edward Hicklin, Bath County Board of Supervisors
- Sue Hirsh, Bath County Public Schools
- Cara Major, Bath Community Hospital
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EXECUTIVE SUMMARY

THE PROBLEM

Located in the Allegheny Mountains of western Virginia, Bath County has a rich history as a destination for visitors seeking to experience the healing waters of its natural springs. Tourism continues to be an important driver of the county's economy to this day, but with its popularity as a visitor attraction has come an unbalanced housing market and affordability challenges for residents and workers. In recent decades, the proliferation of second homes and conversion of year-round housing units to short-term rentals has led to a market that is driven by demand from seasonal residents and visitors. As a result, the community's year-round workforce has limited housing options that are both affordable and of adequate quality. As the supply of workforce housing remains constrained, many of the county's workers have been priced out of the market and are forced to commute in from surrounding areas. Continued decline in the overall population, and particularly in the number of young families, working age individuals, and schoolchildren, puts age-related pressures on the community and threatens the ongoing viability of the county's economy. Additionally, rural homelessness presents an additional need for temporary shelters and permanent, affordable housing. This particular problem is hard to quantify, with people living in tents, couch-surfing, or staying in hotels or motels.

Addressing demand for workforce housing is necessary to:

- ✓ Ensure younger residents put down roots in Bath County, supporting school district enrollment, local volunteer organizations, and community group membership;
- ✓ Establish a larger customer base of year-round residents for local businesses;
- ✓ Better enable businesses to attract and retain workers; and
- ✓ Create a more vibrant culture and a stronger sense of place that is attractive to both current and potential residents.

THE RESPONSE

In response, Bath County, the Central Shenandoah Planning District Commission, and other partners engaged Camoin 310 to conduct a Housing Needs Assessment and Market Analysis Study (the 'Study'). The purpose of this Study is to:

- Understand and quantify the housing affordability and availability challenge;
- Envision how the county's quality of life could change in light of a shrinking year-round population and limited workforce housing options; and
- Offer tools and strategies for addressing the issue.

The process for completing the Study included several components: research and data analysis, interviews with stakeholders, employer and employee surveys, identification of potential tools and strategies, and public engagement. The process was overseen and guided by the Bath County Housing Steering Committee, which provided input and feedback through a series of meetings.

BATH COUNTY DEMOGRAPHIC AND ECONOMIC TRENDS

Bath County's year-round population is declining and aging. The county has lost 760 residents since its peak in 1999, a decline of 15%. The county has a growing share of seniors; currently 45% of the population is 55 and over, compared to about 30% statewide. Only 30% of the population is under the age of 35, compared to 45% statewide.

The county's economy is dominated by the Accommodation and Food Services industry, making up more than a third of all employment. The Omni Homestead is by far the largest employer in this sector and in the economy overall. Local Government is the second largest sector, which includes Bath County Public Schools. The third largest sector is Health Care and Social Assistance, driven by Bath Community Hospital. The county's employment base has contracted slightly over the last 5 years, shedding 94 jobs, a decline of 3.6%.

About 56.4% of all Bath County workers live outside the county, and 50.1% of Bath County residents are employed outside the county. High levels of in- and out-commuting are indicative of a mismatch between employment opportunities and housing options.

Population aging and decline is closely linked to a decrease in employment opportunities and can be worsened by a lack of workforce housing availability. A lack of housing options means that workers may not be able to find a place to live, and businesses reliant on a stable workforce may be forced to close or locate where they can find employees, further contributing to economic decline within the county.

SUPPLY AND DEMAND ANALYSIS

According to the American Community Survey, between 2012 and 2017, the number of year-round occupied units in Bath County decreased while both seasonally occupied units and vacant units increased. Seasonal units may be both second homes or seasonal rentals, and they make up about one third of the county's housing stock, compared to just 10% in the surrounding region.

The county has a high share of vacant units at almost 12% of the housing stock. These are housing units that may be vacant for reasons such as being prepared to rent or sell, being held for repairs, settlement of an estate, or personal reasons. This compares to 9% vacancy in the surrounding region and 8% statewide. Nearly a quarter of all units in the county were built prior to 1939. The high number of vacant units is consistent with findings from interviews and surveys that indicated that affordable units are available on the market, but in many cases, they remain vacant due to their age and substandard quality.

Development activity in Bath County has been very limited since the collapse of the housing market nationally in 2008. In the early 2000s, the County was issuing several dozen building permits per year, largely for higher-end seasonal homes being built in the vicinity of the Homestead. Land values have since dropped by half in some cases, and the general attitude among potential investors and developers has been to "wait and see." Fortunately, recent commitments by Omni to reinvest in the hotel facility has helped investor confidence, and realtors indicate the market seems to be building momentum.

Despite a clear need for both for-sale and rental housing at price points the county's workforce can afford, the real estate market has historically catered to second-homeowners and seasonal visitors. New construction has been mostly at for-sale price points at $300,000 and well above, and practically no new rental housing has been constructed. The lack of contractors within the county is partially to blame for the lack of new workforce housing. Construction costs are considerably higher and construction jobs take considerably longer than they would in surrounding areas, which squeezes the financial return potential for potential developers.

Many property owners have converted existing year-round rental units into seasonal rentals because they can often profit more from renting their property out a few weeks or weekends a year to visitors than they can from renting year-round to residents. According to data from AirDNA, there are 91 short-term rental (STR) units in the county listed on platforms such as Airbnb and Vacation Rentals by Owner (Vrbo). This is considerable when compared to the year-round rental stock of 482 units; converting all STRs to year-round rentals would result in a 19% increase in the rental housing supply.

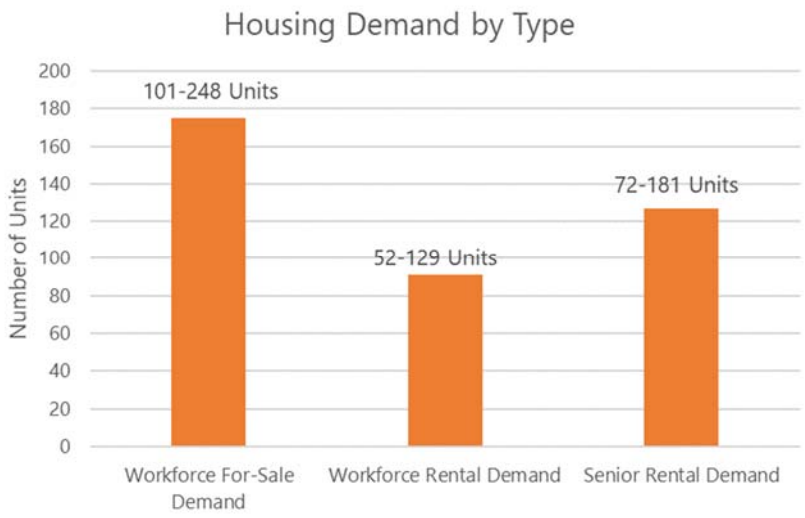
The median home value in Bath County is $169,363, which at first glance appears to be within reach of a household earning the county median income of $46,552. A housing unit is generally considered affordable if the household is spending no more than 30% of its gross income on mortgage, taxes, and insurance; more than 30% we consider a household being cost burdened. However, while the overall home value appears to be affordable, the availability of homes at this price point on the market is extremely limited. An analysis of listings on Zillow showed that the median list price for homes on the market in Bath County over the last year was $300,000. A home at this price would require a household income of $82,800, over $36,000 more than the county median household income. Meanwhile, the median price homes over $50,000 sold in Bath County from 2016-2019 indicate a median sale price of $127,248, indicating a significant price mismatch between supply and demand.

Year-round rentals, *when available*, are generally affordable to the renter population. According the US Department of Housing and Urban Development, the Fair Market Rent (FMR) for a one-bedroom apartment in Bath County is $485, including utilities. This is equivalent to the 40th percentile, or slightly below median rent. FMR for a two-bedroom apartment is $633 and $839 for a three-bedroom. At these rates, minimum required household income is approximately $19,400 for a one-bedroom, $25,320 for a two-bedroom, and $33,560 for a three-bedroom, all below the overall median renter household income of $42,500 in Bath County.

Interview findings and survey responses reveal, however, that rental units are very difficult to find and are typically filled through word of mouth. Rental units are not generally advertised, as property owners are often hesitant to rent to "strangers." New residents moving into the county find it virtually impossible to find rental housing without a personal connection. As a result, employers often must dedicate resources to locating housing for their employees.

According to the surveys conducted for this study, 84% of workers felt there is a lack of housing options in Bath County, and 81% of employers agreed or strongly agreed that finding adequate housing that is affordable is a major challenge for their employees. Respondents to both the employers and employee surveys indicated a need for a variety of housing types, including rental and ownership options, as well as single-family homes, townhouses, and multifamily units.

Overall, there is a projected pent-up demand for approximately 225-558 housing units in Bath County. This consists of demand from Bath County workers currently commuting in from surrounding areas, the under-housed workforce, such as those living with family who would prefer to live on their own, and senior residents who may prefer to downsize if options were available. Workforce housing demand makes up about 68% of this overall demand, with senior demand making up the remaining 32%. Of the demand for workforce housing, we estimate two thirds of this demand to be for for-sale housing (101-248 for-sale workforce units) and one-third for rental housing (52-129 workforce rental units). This demand will be best met through a combination of new residential construction as well as rehabilitation and renovation of existing housing units in need of modernization.



LAND SUITABILITY ASSESSMENT

The county has sufficient water, wastewater, and school capacity to support the range of housing demand identified in the Housing Need Analysis. However, it should be noted that maintenance needs on certain water and sewer lines remain a challenge that will be critical to address to ensure future adequate service. Through this study, several potential development sites were identified for future housing development. Though the housing supply is tightest in the Hot Springs/Warm Springs area, development sites throughout the county were identified.

STRATEGY RECOMMENDATIONS

It is important to stress that the housing affordability challenge in Bath County is less a problem of the overall supply of units and more so about the quality, affordability, location, and marketing of units that are available. Some of this demand could potentially be satisfied by renovating and modernizing existing units located near the county's job centers of Hot Springs and Warm Springs. Moreover, providing downsizing options for seniors would open up existing housing for the workforce. We believe that strategies will be needed to incentivize both the construction of new housing as well as the rehabilitation of existing properties.

In short, there is not enough quality housing at needed price points to support the existing year-round and seasonal workforce. Above all else, the County and its partners need to increase its internal capacity to systematically improve and increase the housing stock. We recognize this work will take a coordinated effort between agencies, developers, County offices, and nonprofit entities. These strategy recommendations, then, focus on creating the systems needed to increase and improve Bath County's housing stock. Through this coordinated effort, the County and its partners can create programs that work to drive up and improve housing units in Bath County. We recommend programs that directly affect housing for the county's workforce to increase opportunities for both home ownership and home rentals.

Our recommendations provide a framework to engage the findings of this study to meaningfully create the programs and structures needed to house programs and facilitate projects to mitigate and fulfill the housing needs in the county.

INTRODUCTION

Like many rural communities, Bath County is challenged to meet the housing needs of residents and workers with a housing stock that is aging and limited. The area's natural amenities have made it a very popular destination among vacationers and seasonal visitors, but this popularity is resulting in higher housing costs due to visitors, second homeowners, and short-term rentals bidding up the housing market.

The degree of second homeownership within the community, combined with the demand for seasonal vacation rentals, limits the supply and affordability of housing options for year-round residents. The county's workforce, low-income households, seniors, the disabled, and other vulnerable populations are finding it increasingly difficult to purchase or even rent homes. This challenge has the potential to become an impediment to the area's ability to function during the off-season, retain a local workforce, and maintain a local school population. This pressure is coupled with the county's limited areas of infrastructure to support development to attract entry-level affordable home ownership opportunities.

Camoin 310 was commissioned by Bath County, VA, with support from Central Shenandoah Planning District Commission (CSPDC), to conduct a Housing Needs Assessment & Market Analysis Study (the 'Study'). This report is framed around answering three questions:

1. **What are the most effective ways to increase the availability of workforce housing?**
2. **How will the County and its partners address the limited availability of rental options and entry-level home ownership?**
3. **How can the economy be made more resilient through housing strategies?**

The purpose of this Study is to understand and quantify the housing affordability challenge and develop strategies and recommendations to alleviate this challenge. In conducting this analysis, quantitative data from a number of proprietary and public data sources was combined with qualitive data learned through stakeholder interviews, a community meeting, and employer and employee surveys.

WHY IS HOUSING IMPORTANT?

Workforce housing is important to the economic vitality of communities. Affordable homes support the local workforce so workers can live close to their jobs. Shorter commutes allow workers to spend more time with their families while the community benefits from having employees such as schoolteachers, nurses, and business owners living locally and engaged in the community. A healthy mix of housing options—including market-rate and affordable, owner-occupied and rental, single-family and multifamily—targeted to households across the age spectrum, ensure opportunities for all individuals to improve their economic situation and contribute to their communities.

Adding workforce housing in Bath County would have numerous benefits, particularly year-round workforce housing. One of the most important benefits is that it supports the vitality and sustainability of the area. In particular, workforce housing will serve

WHY WORKFORCE HOUSING?

- ✓ **Better enable businesses to attract and retain workers.**
- ✓ **Ensure there are residents to support school enrollment, local volunteer organizations, and community group membership.**
- ✓ **Establish a larger customer base of year-round residents for local businesses.**
- ✓ **Create a stronger sense of place that is attractive to both current and potential residents.**

to meet the needs of entry-level workers and workers who want to stay in the area as they grow into adulthood. This will help to ensure that a steady flow of younger residents will put down roots in Bath County and enroll their children in its schools, join volunteer organizations, and support community groups. Additionally, local businesses will benefit both from having a larger customer base of year-round residents and from an improved ability to attract and retain workers. All of these impacts will compound, creating a more vibrant culture and a stronger sense of place in Bath County that is attractive both to current and potential residents.

WORK COMPLETED

This final report is a cumulation of the following tasks:

Demographic & Economic Analysis | The Demographic & Economic Analysis creates a baseline of information that informs the Housing Needs Analysis and helps frame the final strategies and recommendations. The purpose of this section is to provide a statistical foundation for housing strategies, and includes socioeconomic information including population, age distribution, median household income, and commuting patterns.

Housing Need Analysis | This analysis comprises the bulk of our work in Bath County, and contains a housing supply and demand analysis, supplemented by stakeholder interviews, a community meeting, employee and employer surveys, and land suitability assessment.

- The supply analysis helps us understand the type of housing, quality, cost and affordability, vacancy, seasonality, and other key attributes that have changed over time.
- The demand analysis provides information on the housing gaps that exist in Bath County, with emphasis on workforce housing needs.
- Community engagement sheds light on the capacity available for taking on additional housing strategies, existing housing efforts underway, as well as previous housing projects that have both succeeded and not. In addition, it helps show how market conditions affect access to housing and employers' ability to attract and retain workers, as well as employee's need for housing.
- The land suitability assessment identifies sites which show the most promise for future housing development both in the short and long term.

Strategy Recommendations | Developing housing strategies requires a holistic approach encompassing not only building and site availability and private sector investments, but also quality of life amenities and sustainable business practices (among other considerations). Using the information collected in the preceding steps, Camoin provides recommendations around housing strategies to accommodate existing and future housing demand in Bath County. Recognizing local constraints to achieving housing goals, we provide a framework that fits within the existing capacity of partner organization(s).

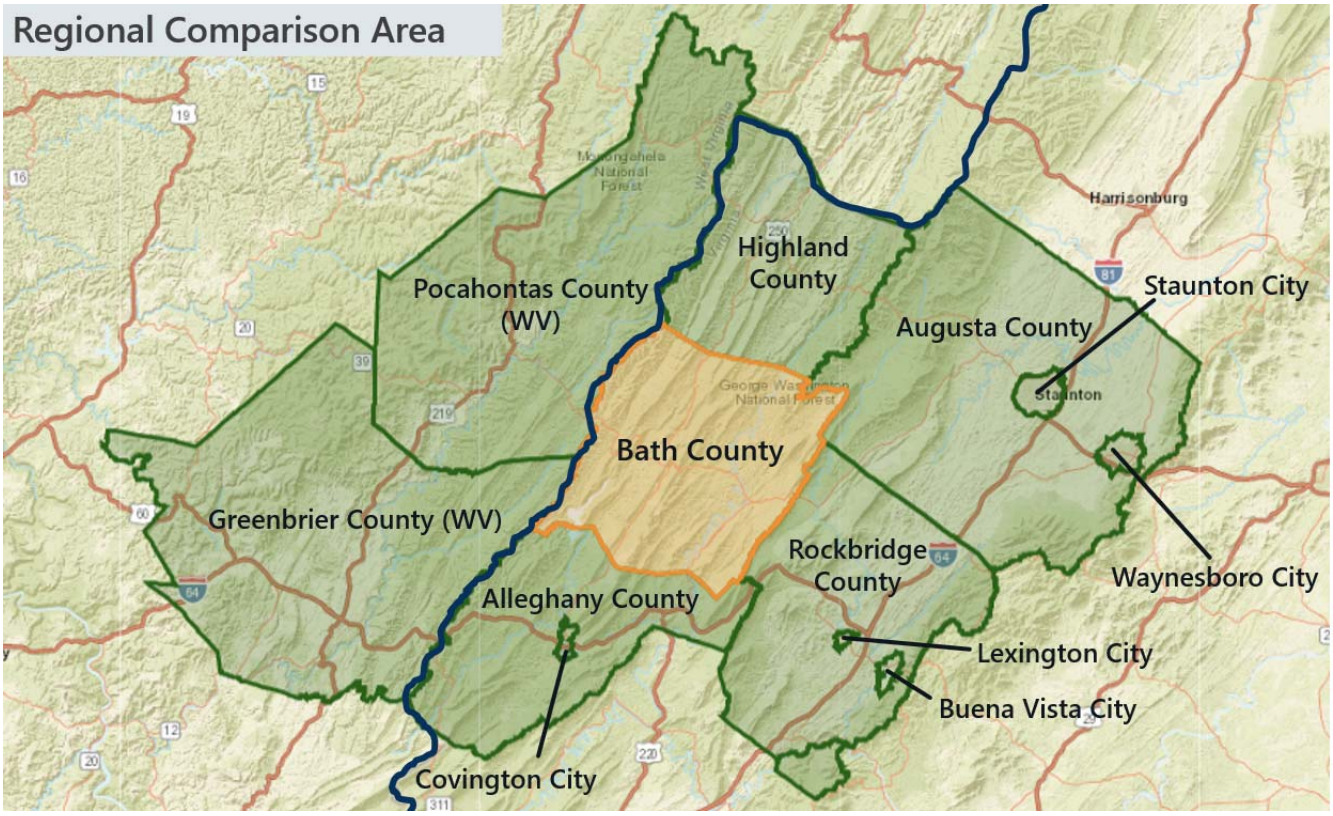
DEMOGRAPHIC & ECONOMIC ANALYSIS

Understanding the socioeconomic conditions of Bath County and the surrounding region creates a baseline of information to understand how the community has, and will continue, to change. With this data we can ascertain population and income shifts and what that means for housing needs looking forward.

STUDY REGIONS

In our data analysis, we compare Bath County to other geographies to assess the economic health, potential opportunities, and potential challenges within the county. This comparison of geographic locations can also help support or challenge housing and economic perceptions. For this analysis we compare Bath County to the "Bath County Region," which includes the neighboring counties of Alleghany, VA; Augusta, VA; Greenbrier, WV; Highland, VA; Pocahontas, WV; and Rockbridge, VA; and the cities of Buena Vista, Covington, Lexington, Staunton, and Waynesboro all located in Virginia. Where appropriate, we have also compared Bath County to the Commonwealth of Virginia and the United States.

Figure 1: Regional Comparison Area



DATA SOURCES

Much of the data in this report was acquired from Esri Business Analyst Online (Esri) and Economic Modeling Specialists International (Emsi). It uses proprietary statistical models and data from the US Census Bureau, the US Postal Service, and other sources to project current statistics and future trends. Esri data are often used for economic development, marketing, site selection, and strategic decision making. For more information, visit **www.esri.com**.

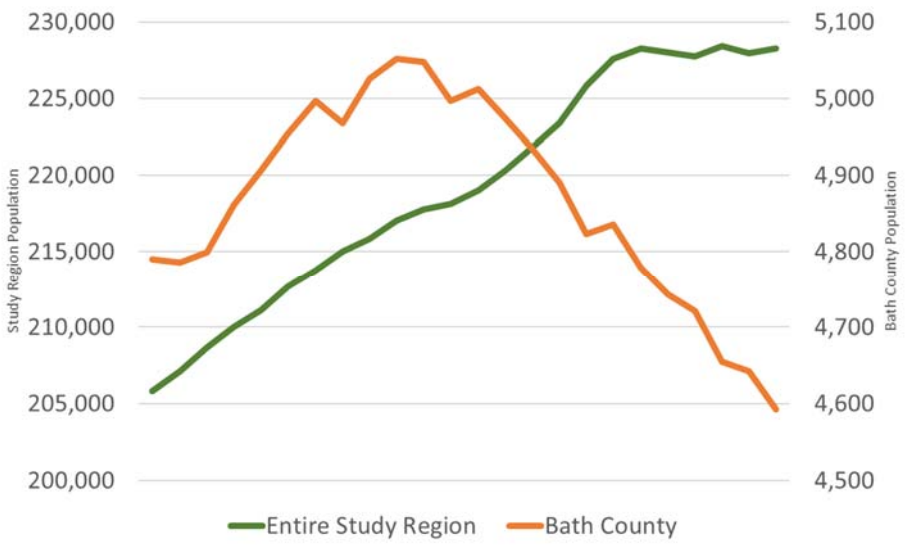
Emsi uses data compiled from several sources, including the US Census Bureau and US Departments of Health and Labor. Using specialized proprietary processes and models, it provides estimates on current statistics and predicts future trends. Visit **www.economicmodeling.com** for additional information. The data used are from Emsi's Complete Employment data set, which includes both jobs covered and uncovered by unemployment insurance. In other words, it includes both traditional employment and non-traditional employment such as the self-employed. As traditional jobs have been replaced or augmented by freelance work, consulting, and self-employment, these non-covered jobs have become much more important to the economy, and Emsi provides researchers with a way to track the trends over time.

Other data sources include the American Community Survey for demographic and socioeconomic data; for a full list of data sources see Appendix C.

POPULATION

Since 1990, Bath County's year-round population has dropped from 4,790 to 4,292 (-10.4%). The county's highest population was in 1999 with 5,052 residents. Region-wide however, the population has increased 11.4% from 205,808 to 229,204. Much of this regional growth can be attributed to Augusta County, which contributed 88% to total region-wide growth.

Figure 2: Population Growth, Bath County vs. Regional Comparison Region, 1990-2018

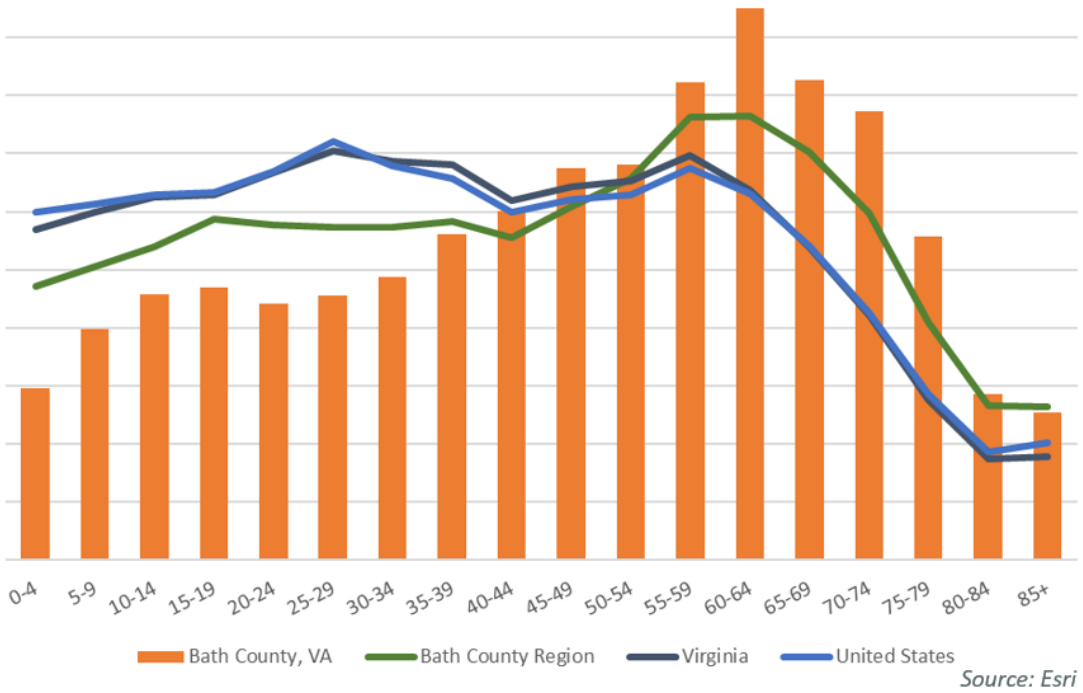


Source: US Census

Figure 3 outlines total population by age cohort comparing Bath County to the region, state, and country. Proportionally, the county has a lower number of those aged under 34 (30% in the county, 38% in the region, 45% in the state, and 46% in the country). While all geographies have a trending older population, the county has a high percentage of those aged 55 and up; 45% of the county's population is aged 55 and up compared to 38% in the region, 29% in the state, and 30% in the country. Housing that addresses the 55+population, therefore, will be important to address in forthcoming housing strategies.

BATH COUNTY, VA

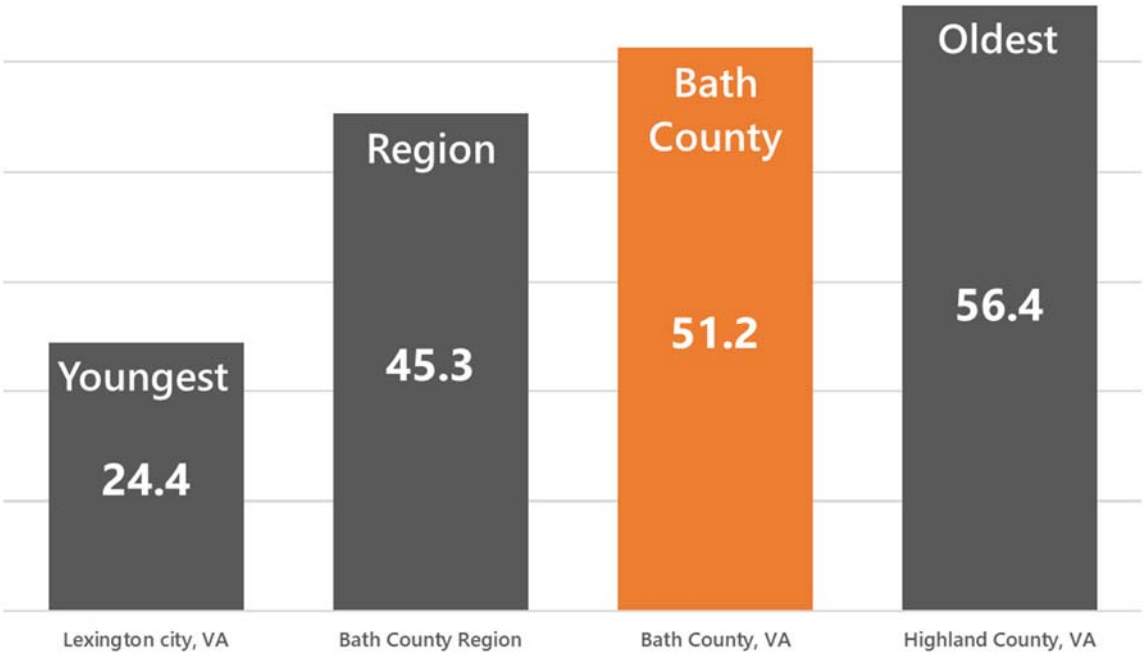
Figure 3:Distribution of Age



Source: Esri

The trending older population is also reflected in median age data. The median age in Bath County is 51.2 years old. This implies the need for additional housing for an older age cohort and the need to attract a younger cohort. Within the region, the median age is 45.3. With its several colleges and universities, Lexington is the youngest geography with a median age 24.4 years old, and Highland County is the oldest with a median age of 56.4.

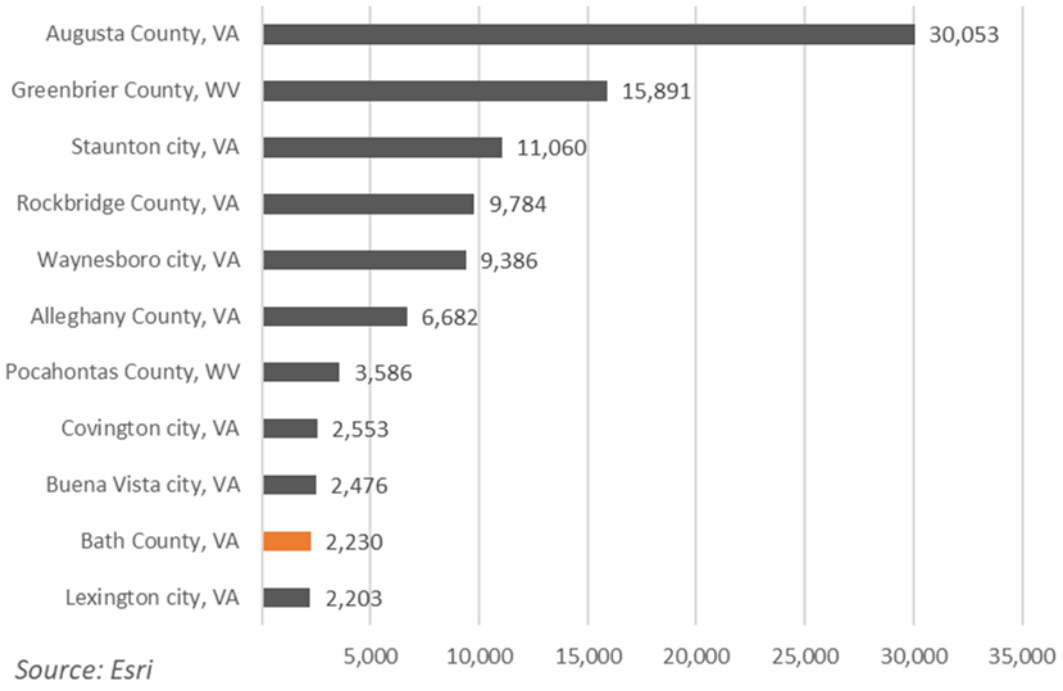
Figure 4: Median Age



HOUSEHOLDS & INCOME

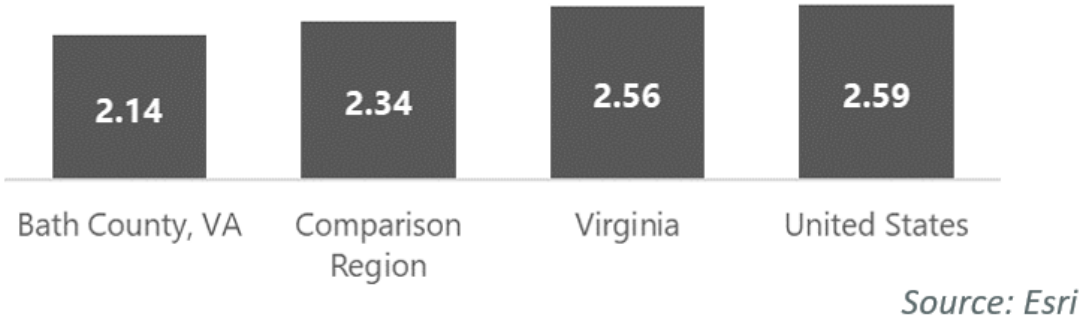
As of 2019, there are 2,230 households in Bath County, just 2% of the total households in the region. The majority of households in the region are in Augusta County; Greenbrier County, WV; and Staunton City.

Figure 5: Number of Households by Geography, 2019



When comparing household size to the comparison geographies, Bath County represents the smallest household size with 2.14 persons per household. As smaller household size is usually an indication of less family households attributed with an older population; again, this indicates a potential need for senior housing.

Figure 6: Average Household Size



BATH COUNTY, VA

When comparing the change in households from 2010 to 2019 and 2019 projected to 2024, the county and region have slower growth than the state and nation. Households in the county grew by 3.1% between 2010 and 2019. An increase in households in combination with a population decrease (Figure 2) indicates fewer people per household due to age or people having fewer children. Looking forward to 2024, the county is expected to decline by 2.1% households despite household gains in the region, state, and nation. These shifting demographics reflect a need for additional housing to meet smaller, older households.

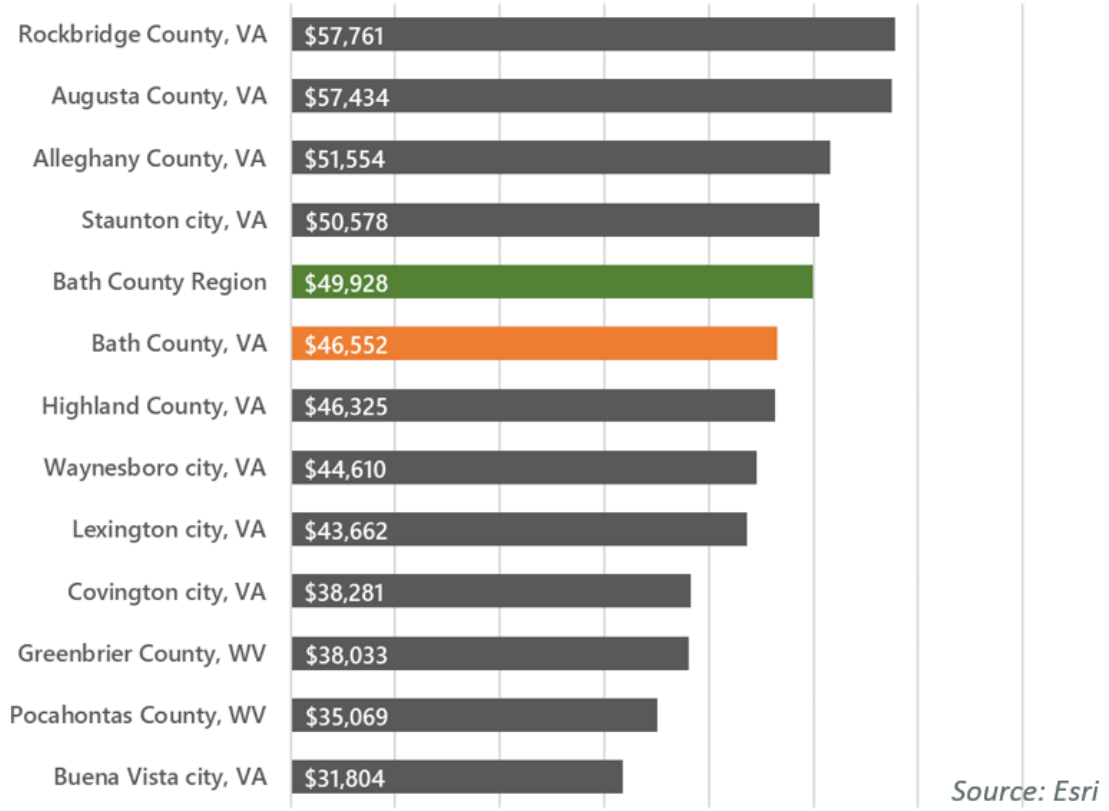
Figure 7: Change in Households, 2010-2024

	% Change 2010-2019	% Change 2019-2024
Bath County, VA	3.1%	(2.1%)
Bath County Region	2.9%	1.2%
Virginia	7.2%	3.7%
United States	7.2%	3.8%

Source: Esri

Median household income (MHI) for year-round households varies throughout the region from a high of $57,761 in Rockbridge County to a low of $31,804 in Buena Vista City. Overall the average MHI in the region is $49,928, approximately $3,000 higher than the Bath County's MHI of $46,552. Median household income is an important data point to understand overall housing affordability, given home values, which will be discussed in a subsequent section of this report.

Figure 8: Median Household Income



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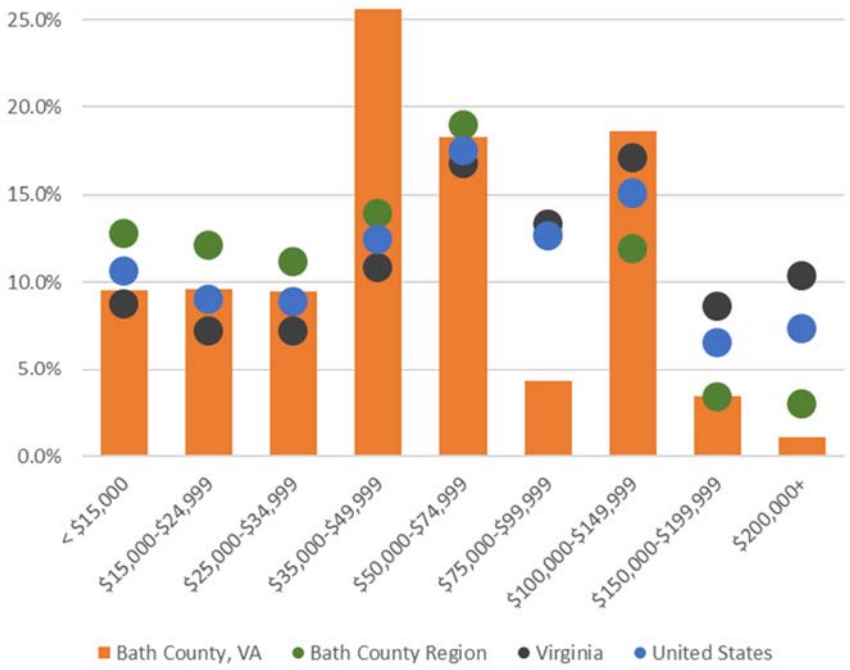
When examining households by income level, Figure 9, most notable is the proportion (26%) of those making between $35,000 and $49,999 in the county. This is at least twice that of the other comparison regions. And while the county has a similar proportion of those households making between $100,000 and $149,999, they lag behind the comparison regions in the $75,000 to $99,999 and $200,000+ range. Overall, 54% of households in the county make less than $50,000. Creating housing for these lower income levels will be an important portion of forthcoming housing strategies.

Figure 9: Distribution of Year-Round Household Income



Source: Esri

Figure 10: Bath County Households by Income and Age of Householder, 2019

Bath County Households by Income and Age of Householder, 2019								
	<25	25-34	35-44	45-54	55-64	65-74	75+	Total
<$15,000	0.2%	1.0%	1.1%	1.2%	2.5%	1.8%	1.8%	9.6%
$15,000-$24,999	0.2%	0.6%	0.7%	0.6%	1.4%	2.4%	3.7%	9.6%
$25,000-$34,999	0.2%	0.8%	1.1%	1.0%	1.7%	2.3%	2.3%	9.5%
$35,000-$49,999	0.8%	2.9%	2.7%	4.3%	5.7%	5.6%	3.6%	25.6%
$50,000-$74,999	0.9%	1.6%	2.2%	3.3%	4.6%	4.3%	1.4%	18.3%
$75,000-$99,999	0.0%	0.4%	0.7%	0.9%	1.1%	0.4%	0.8%	4.3%
$100,000-$149,999	0.2%	1.9%	4.1%	4.0%	3.7%	3.0%	1.7%	18.6%
$150,000-$199,999	0.0%	0.3%	0.3%	0.7%	0.9%	0.8%	0.4%	3.5%
$200,000+	0.0%	0.0%	0.2%	0.2%	0.4%	0.1%	0.1%	1.1%
Total	2.6%	9.5%	13.0%	16.2%	22.0%	20.9%	15.9%	100.0%

Source: Esri

COMMUTE PATTERNS

According to the US Census OnTheMap, in 2017 there were 764 people who were both employed and living in Bath County. Half of all residents (50.2%) commute out of Bath County for work, while over half (56.3%) of Bath County workers commute into the area for work.[1] Outside of the county, the most common work destinations for residents (out-commuters) are Alleghany County, Covington, and Augusta County. These same locales are the most common places of residence for Bath County workers who are not residents (in-commuters).

Figure 11: Bath County Work Destinations and Places of Residence

Where Residents Work, 2017	
Location	Share
Bath County, VA	49.8%
Alleghany County, VA	5.7%
Covington city, VA	5.1%
Augusta County, VA	3.3%
Fairfax County, VA	2.1%
Rockbridge County, VA	2.1%
All Other Locations	31.8%
All Counties	100.0%

Where Workers Live, 2017	
Location	Share
Bath County, VA	43.7%
Alleghany County, VA	13.5%
Covington city, VA	6.2%
Augusta County, VA	2.7%
Rockbridge County, VA	2.2%
Highland County, VA	1.9%
All Other Locations	29.6%
All Counties	100.0%

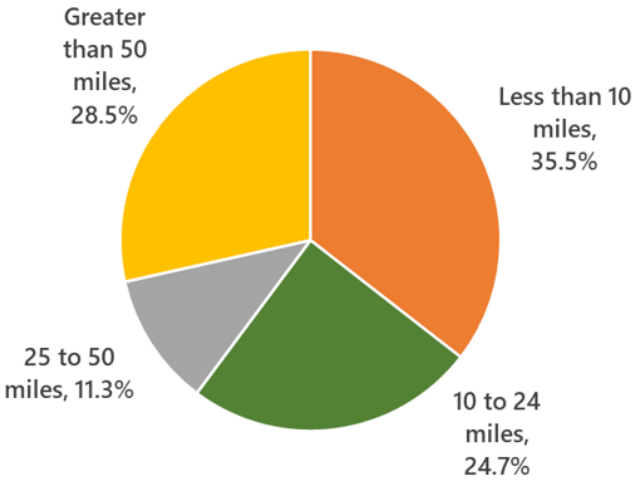
Source: U.S. Census OnTheMap

The greatest proportion of residents have a commute less than 10 miles (35.5%) while 28.5% have a commute of more than 50 miles. This speaks to the diffuse nature of work in rural communities.

56.3% of all Bath County workers live outside the county.

50.2% of all Bath County residents are employed outside the county.

Figure 12: Distance to Work for Bath County Residents



Source: US Census OnTheMap, 2017

[1] US Census OnTheMap does not include self-employed workers.

INDUSTRY OVERVIEW

This section provides an analysis of economic trends and industry performance for Bath County. The previous sociodemographic data, combined with this industry data, provides a more complete picture of the county's economic outlook, and helps align employer needs for workforce and workforce housing.

HISTORIC INDUSTRY OVERVIEW

When examining all jobs in Bath County and the other geographies from 2014 to 2024 (Figure 13) we see a drop in jobs from 2014 to 2019 in the county (-3.6%) but an increase in the Study Region (3.7%) and state (7.7%). Projected jobs numbers depict an increase in jobs by 2.8% in the county, the Study Region by 3.8% and the state by 4.9%. While growth will not be as strong as in the comparison geographies, this is a generally positive indication that there will be a steady supply of workers for workforce housing. Average earnings in the county are $43,906, approximately $4,116 less than the Study Region and $24,466 less than the average earnings state-wide.

Figure 13: Industry Overview by Region, 2014-2024

Bath County Industry Overview by Region, 2014-2014								
Region	2014 Jobs	2019 Jobs	2024 Jobs	2014 - 2019 Change	2014 - 2019 % Change	2019 - 2024 Change	2019 - 2024 % Change	Avg. Earnings Per Job
Bath County	2,592	2,498	2,567	(94)	(3.6%)	69	2.8%	$ 43,906
Study Region	95,785	99,372	103,149	3,587	3.7%	3,777	3.8%	$ 48,022
Virginia	4,159,729	4,478,408	4,697,888	318,679	7.7%	219,480	4.9%	$ 68,372

Source: Emsi

INDUSTRY OVERVIEW (2-DIGIT NAICS[2])

Figure 14 shows a summary of all jobs in Bath County. They are categorized by 2-digit NAICS code[3]; number of jobs in 2014, 2019, and 2024; the average yearly earnings of each category; and the industry's Location Quotient. The Location Quotient measures an industry's relative concentration in a given area compared to the rest of the United States. A Location Quotient above 1 denotes a higher concentration of an industry in a given geographic area compared to the rest of the United States, while a Location Quotient below 1 denotes a lower relative density. This figure is used to show industry clustering and identify industries that may be particularly prominent in the area.

In Bath County, NAICS 72 Accommodation and Food Services and NAICS 90 Government represent the two industries with the largest number of jobs, at 910 and 405 respectively. The next largest industry by number of jobs is, NAICS 62 Health Care and Social Assistance with 223 jobs. Note that the Government industry includes local and state government jobs in the county, but also spans positions at local, state and federally owned educational and health care institutions, as well as military jobs. Industries with the top Location Quotients include Utilities (14.87), Unclassified Industry[4] (5.10), and Accommodation and Food Services (4.37).

[2] Industries are classified by the North American Industrial Classification System (NAICS). The US Census Bureau maintains NAICS codes, which are the standard used by Federal statistical agencies in classifying business establishments. 2-digit codes are the most basic aggregate NAICS code level and represent broad categories such as "retail," whereas 4-digit industry codes present a finer level of detail such as "grocery stores." For those interested in understanding the composition of the NAICS and more detail about what is included in each industry, visit: **http://www.census.gov/eos/www/naics/**.

[3] Employment figures in the following tables represent jobs, not workers, since 1 individual may hold multiple jobs. Additionally, employment figures include both full and part-time jobs, meaning job counts are not adjusted to FTE.

[4] The Unclassified industry is used by Quarterly Census of Employment and Wages to categorize businesses who did not report a NAICS code. These are mostly newer businesses who have not yet determined their proper NAICS code.

BATH COUNTY, VA

Figure 14: Bath County Industry Overview

Bath County Industry Overview											
NAICS	Description	2014 Jobs	2019 Jobs	2024 Jobs	2014 - 2019 Change	2014 - 2019 % Change	2019 - 2024 Change	2019 - 2024 % Change	Avg. Earnings Per Job	2018 Location Quotient	2018 GRP
11	Agriculture, Forestry, Fishing and Hunting	37	22	21	(15)	(40.5%)	(1)	(4.5%)	$ 31,866	0.76	$ 3,794,553
21	Mining, Quarrying, and Oil and Gas Extraction	0	0	0	0	0.0%	0	0.0%	$ -	0.00	$ 1,595,204
22	Utilities	101	131	145	30	29.7%	14	10.7%	$103,535	14.87	$ 51,331,479
23	Construction	189	151	150	(38)	(20.1%)	(1)	(0.7%)	$ 42,210	1.09	$ 9,534,761
31	Manufacturing	47	80	101	33	70.2%	21	26.3%	$ 34,487	0.37	$ 3,881,679
42	Wholesale Trade	<10	<10	<10	Insf.	Insf.	Insf.	Insf.	Insf.	0.06	$ 1,548,444
44	Retail Trade	69	64	61	(5)	(7.2%)	(3)	(4.7%)	$ 23,071	0.26	$ 3,417,435
48	Transportation and Warehousing	11	10	10	(1)	(9.1%)	0	0.0%	$ 86,051	0.12	$ 1,925,008
51	Information	42	47	60	5	11.9%	13	27.7%	$ 65,787	0.96	$ 9,708,473
52	Finance and Insurance	14	15	16	1	7.1%	1	6.7%	$ 41,252	0.14	$ 2,407,808
53	Real Estate and Rental and Leasing	36	26	23	(10)	(27.8%)	(3)	(11.5%)	$ 47,243	0.65	$ 11,718,243
54	Professional, Scientific, and Technical Services	91	132	178	41	45.1%	46	34.8%	$ 65,937	0.72	$ 10,849,125
55	Management of Companies and Enterprises	17	49	61	32	188.2%	12	24.5%	$ 30,113	1.24	$ 1,540,877
56	Administrative and Support and Waste Management and Remediation Services	48	39	34	(9)	(18.8%)	(5)	(12.8%)	$ 34,801	0.26	$ 2,048,133
61	Educational Services	<10	67	89	Insf.	Insf.	22	32.8%	$ 41,181	0.93	$ 2,545,899
62	Health Care and Social Assistance	246	223	251	(23)	(9.3%)	28	12.6%	$ 57,030	0.68	$ 14,778,467
71	Arts, Entertainment, and Recreation	25	20	17	(5)	(20.0%)	(3)	(15.0%)	$ 41,328	0.48	$ 2,541,471
72	Accommodation and Food Services	1,084	910	847	(174)	(16.1%)	(63)	(6.9%)	$ 33,348	4.37	$ 60,944,117
81	Other Services (except Public Administration)	124	90	82	(34)	(27.4%)	(8)	(8.9%)	$ 25,164	0.79	$ 3,293,075
90	Government	404	405	404	1	0.2%	(1)	(0.2%)	$ 46,689	1.09	$ 21,139,684
99	Unclassified Industry	<10	12	11	Insf.	Insf.	(1)	(8.3%)	$ 24,391	5.10	Insf. Data
	Bath County	2,592	2,498	2,567	(94)	(3.6%)	69	2.8%	$ 43,906		

Source: Emsi

A CLOSER LOOK: TOP 4-DIGIT INDUSTRIES

Figure 15 below outlines the top 25 industries by 2019 jobs by 4-digit NAICS codes (which are more refined industry sectors than 2-digit codes). This is a snapshot of what has happened with Bath County's largest industry sectors over the last five years and how these sectors are anticipated to grow or decline into the future. The largest industries revolve around those in accommodations, government, and health care. Some of the county's top industries are expected to decline by 2024; of the 25 sectors listed below, 5 are expected to decline, including the top industry NAICS 7211 Traveler Accommodation.

Figure 15: Top 25 4-Digit Industries in Bath County

NAICS	Description	2014 Jobs	2019 Jobs	2024 Jobs	2014 - 2019 Change	2014 - 2019 % Change	2019 - 2024 Change	2019 - 2024 % Change	Avg. Earnings Per Job	2018 Location Quotient
2211	Electric Power Generation, Transmission and Distribution	100	123	133	23	23.0%	10	8.1%	$106,462	19.88
2361	Residential Building Construction	39	53	63	14	35.9%	10	18.9%	$ 38,522	2.60
2373	Highway, Street, and Bridge Construction	47	23	13	(24)	(51.1%)	(10)	(43.5%)	$ 64,703	5.09
2389	Other Specialty Trade Contractors	24	34	35	10	41.7%	1	2.9%	$ 37,679	2.09
3152	Cut and Sew Apparel Manufacturing	10	33	43	23	230.0%	10	30.3%	$ 13,267	18.54
3211	Sawmills and Wood Preservation	30	35	40	5	16.7%	5	14.3%	$ 51,137	22.26
4451	Grocery Stores	14	28	32	14	100.0%	4	14.3%	$ 21,177	0.66
5173	Wired and Wireless Telecommunications Carriers	<10	47	59	Insf. Data	Insf. Data	12	25.5%	$ 65,491	4.25
5415	Computer Systems Design and Related Services	10	76	113	66	660.0%	37	48.7%	$ 72,448	1.83
5419	Other Professional, Scientific, and Technical Services	<10	27	35	Insf. Data	Insf. Data	8	29.6%	$ 41,831	1.78
5511	Management of Companies and Enterprises	17	49	61	32	188.2%	12	24.5%	$ 30,113	1.24
5613	Employment Services	18	18	19	0	0.0%	1	5.6%	$ 49,860	0.32
5617	Services to Buildings and Dwellings	26	19	13	(7)	(26.9%)	(6)	(31.6%)	$ 23,516	0.47
6111	Elementary and Secondary Schools	0	65	87	65	Insf. Data	22	33.8%	$ 41,724	3.27
6221	General Medical and Surgical Hospitals	133	183	206	50	37.6%	23	12.6%	$ 61,219	2.47
6231	Nursing Care Facilities (Skilled Nursing Facilities)	18	27	33	9	50.0%	6	22.2%	$ 36,210	1.02
7211	Traveler Accommodation	1,009	817	733	(192)	(19.0%)	(84)	(10.3%)	$ 34,161	28.59
7212	RV (Recreational Vehicle) Parks and Recreational Camps	19	31	38	12	63.2%	7	22.6%	$ 23,546	26.88
7225	Restaurants and Other Eating Places	56	58	71	2	3.6%	13	22.4%	$ 25,804	0.33
8141	Private Households	68	44	36	(24)	(35.3%)	(8)	(18.2%)	$ 19,224	3.55
9011	Federal Government, Civilian	30	28	30	(2)	(6.7%)	2	7.1%	$ 78,426	0.64
9026	Education and Hospitals (State Government)	44	102	124	58	131.8%	22	21.6%	$ 31,064	2.01
9029	State Government, Excluding Education and Hospitals	65	31	24	(34)	(52.3%)	(7)	(22.6%)	$ 42,318	1.00
9036	Education and Hospitals (Local Government)	117	109	101	(8)	(6.8%)	(8)	(7.3%)	$ 63,665	0.86
9039	Local Government, Excluding Education and Hospitals	135	121	113	(14)	(10.4%)	(8)	(6.6%)	$ 40,140	1.43

Source: Emsi

HOUSING NEED ANALYSIS

HOUSING SUPPLY

Bath County has 3,353 housing units as of the latest available US Census data in 2017. From 2012-2017 there has been a 15% drop in the number of owner-occupied units and a 20% increase in the number of rental units. Seasonally vacant homes[5] have grown by 24% and otherwise vacant homes have increased by 166%. "Otherwise vacant" homes refer to those currently on the market, rented or sold but not occupied, or otherwise unoccupied. From stakeholder interviews we believe this increase could be due to the poor conditions of the existing housing stock contributing to increased vacancies. In addition, this mirrors a population decline in Bath County during the same time period.

Figure 16: Total Housing Units in Bath County

	2012	2017	# Change	% Change
Occupied	2,008	1,847	(161)	(8%)
Owner	1,606	1,365	(241)	(15%)
Renter	402	482	80	20%
Vacant	1,048	1,506	458	44%
Seasonally Vacant	900	1,113	213	24%
Otherwise Vacant	148	393	245	166%
Total	3,056	3,353	297	10%

Source: US Census Bureau, 2013-2017 American Community Survey 5-Year Estimates

When comparing occupancy data to other geographic regions (Figure 17) the most noticeable finding is the high percentage of seasonally vacant housing units: 33%. In addition, year-round, owner-occupied housing declined by 15%. While not the highest in the region, Bath County ranks third after Pocahontas County with 50%, and Highland County with 36% seasonally vacant housing.

This higher proportion of seasonally vacant homes means less opportunity for year-round home ownership and rentals. As the popularity of renting units short term increases, with the help of online platforms like Airbnb and Vrbo, it reduces the supply of units that could be available for year-round rentals. Given the county's largest economic generator is tourism adding short term rentals is a good way for homeowners to garner income; however, by reducing the supply it has the potential to impact the year-round housing available for Bath County's workforce.

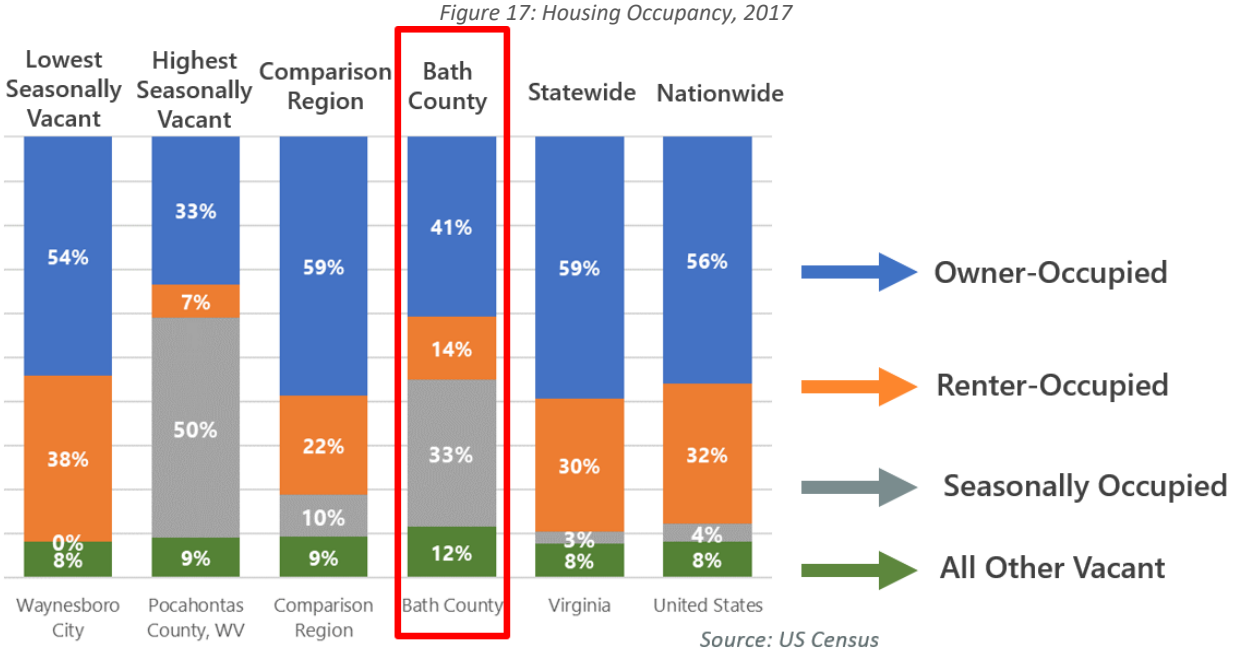
Bath County has seen an increase in seasonally occupied homes from 900 in 2012 to 1,113 in 2017, an increase of 24%.

[5] Also referred to as seasonally occupied.

BATH COUNTY, VA

Additionally, a healthy vacancy rate typically ranges from 5-10%. While the other comparison geographies fall within this range, Bath County is slightly higher with "other vacant" at 12%[6]. We can infer from this that the housing that does exist is not meeting the needs of those who are seeking it, i.e. that there is an oversupply of certain types of housing. From stakeholder interviews it was revealed that substandard housing is an issue; while there is housing available, the low quality is not what people are looking for.

Figure 17: Housing Occupancy, 2017



Source: US Census

Both owner-occupied and renter occupied housing are proportionally lower in the county when compared to the region. Forty-one percent of the county's housing is owner-occupied compared to 59% in the region, and 14% of the county's housing is renter-occupied compared to 22% in the region. This instability and lack of available year-round housing can have adverse effects in the community leading to worker shortages, extended commutes, and living in less-than-desirable housing conditions.

[6] "Other vacant" refers to year-round units which are vacant for reasons such as the settlement of an estate, personal reasons, being prepared to rent or sell, or held for repairs.

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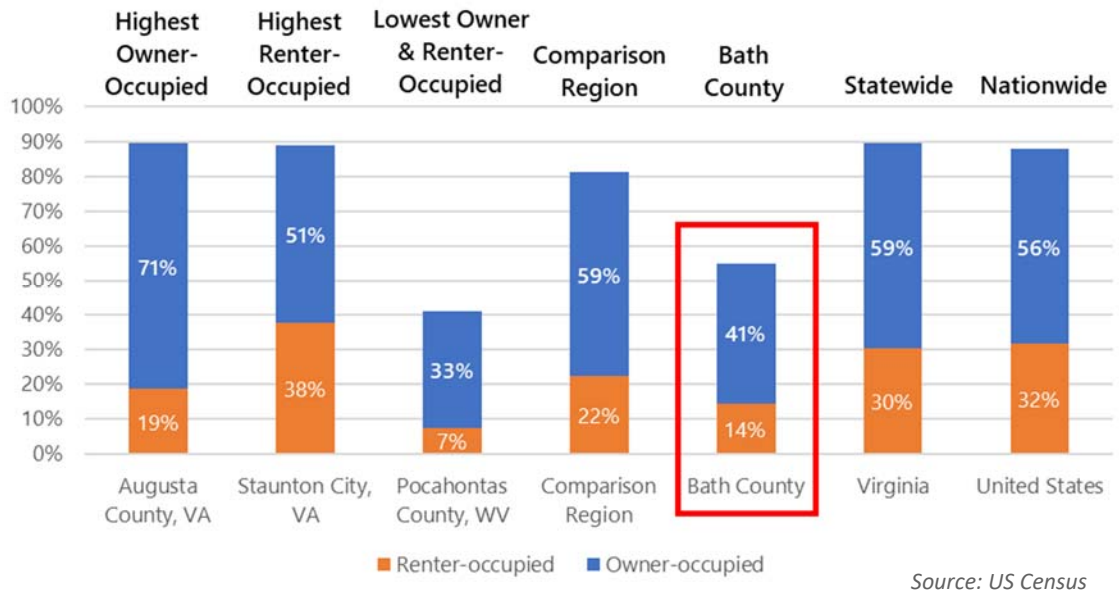
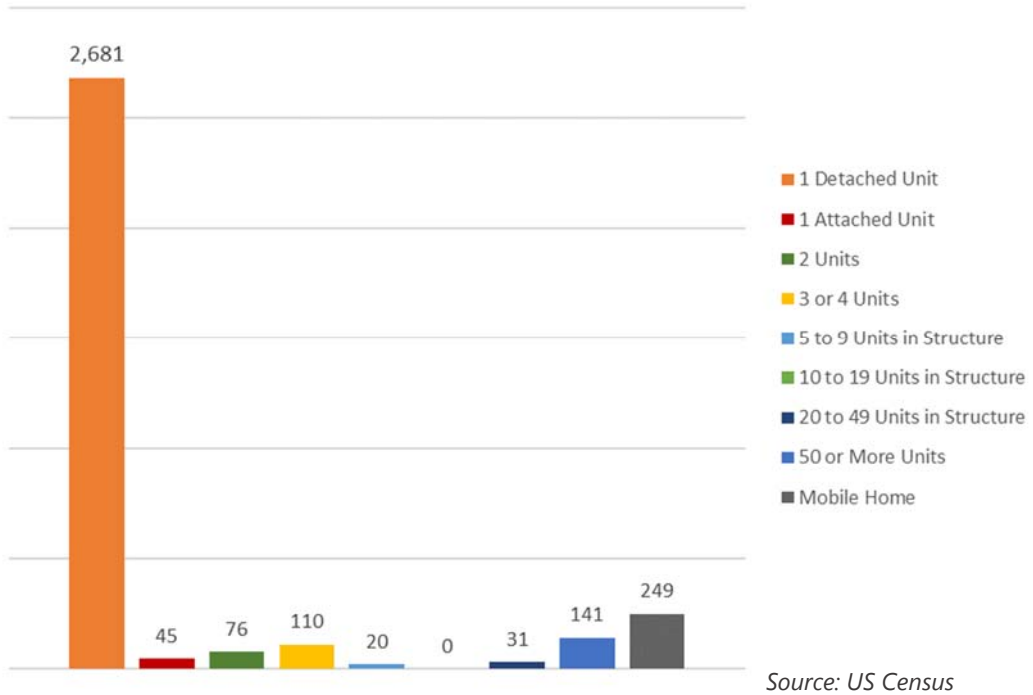
Figure 18: Owner and Renter Occupied Year-Round Housing, 2017



Source: US Census

The housing stock in Bath County is predominately single-family homes at 2,726 units. This includes both detached and attached 1 unit structures. The next highest unit type is mobile homes, at 249 units. Just 76 housing structures are comprised of 2 units, and 110 structures are comprised of 3 or 4 units. Those structures with 5 or more units comprise 192 units. The lack of supply of higher unit structures could be impacting the availability of affordable housing, as building more units within each structure traditionally costs less to build per unit and can result in more affordable rents.

Figure 19: Number of Units in Structure



Source: US Census

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Figure 20 illustrates the year structures were built in each comparison geography. In Bath County, the median year housing was built was 1973, older than the housing stock across the region, state, and nation. A quarter of the county's structures were built prior to 1939. An aging housing stock can lead to disinvestment in upkeep resulting in a poorer quality in overall housing stock. This in turn causes people to move outside the area to find more suitable housing or, if options are limited, reside in a less-than-desirable housing.

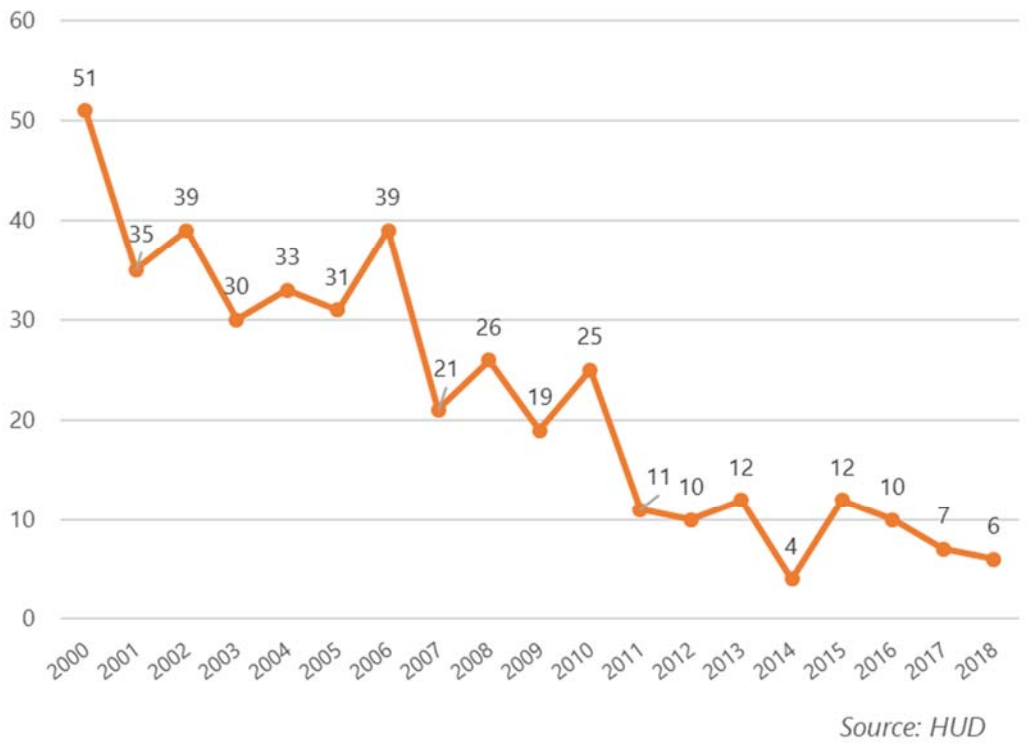
Figure 20: Units Built 1939 or Earlier by Geography, 2017

Units Built 1939 or Earlier by Geography, 2017					
	Bath County		Comparison Region	Virginia	US
Year Built	#	%	%	%	%
1939 or earlier	821	24.5%	17.3%	7.6%	12.9%
Total housing units	3,353	100.0%	100.0%	100.0%	100.0%
Median Year Built	1973		1975	1981	1977

Source: US Census Bureau, 2013-2017 American Community Survey 5-Year Estimates

Building permit data sourced from the US Department of Housing and Urban Development (HUD) indicates a decrease in the number of annual permits issued from 2000, when 51 permits were issued, through 2018, when just six permits were issued. All permits were issued for single family housing; the last time a multifamily building permit was issued was in 1986.

Figure 21: Bath County Building Permits, 2000-2018



SHORT-TERM RENTAL STOCK

Short-term vacation rentals, such as those listed through platforms like Airbnb and Vrbo, impact the local housing market because they make it easy for homeowners to rent to vacationers, who are typically willing to pay higher rents than local residents. A housing unit that once housed a year-round local resident may be converted to a seasonal short-term rental, removing the unit from the year-round rental housing stock and thus constricting the supply of rental housing and putting upward pressure on housing costs.[7]

Short-term rental listings for an entire housing unit have the greatest impact on housing affordability. At the same time, short-term rentals provide an opportunity for locals to supplement their incomes by renting out their homes during peak season while they live elsewhere.

According to AirDNA, as of 2019 there are 91 rental units available, both room and entire home rentals, in Bath County.[8] The growth in short-term rentals has accelerated over the last few years; since 2016 short-term rentals in Bath County have grown by 355% or 71 units. Reducing the housing supply by this amount impacts the availability of year-round rentals available to Bath County residents.

Figure 22: Short-Term Rentals by Property Size, 2019

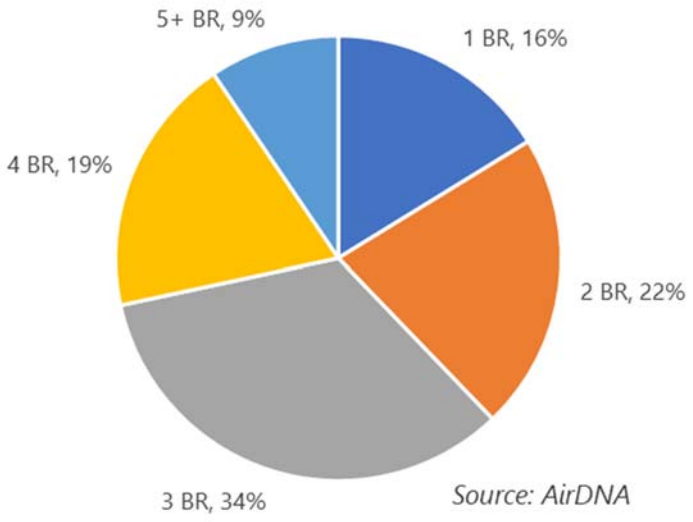
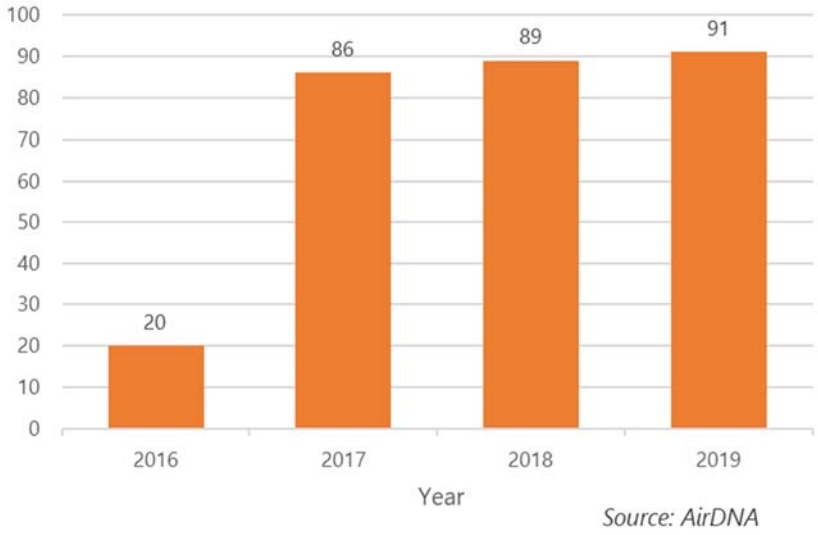


Figure 23: Total Short-Term Rentals in Bath County, 2016-2019



[7] Based on the average of a selection of properties available for short term stay on Airbnb, a three-bedroom property can rent for an average rate of $160 per night.

[8] Data collected from the 24445, 24460, and 24484 ZIP Codes.

BATH COUNTY, VA

HOUSING AFFORDABILITY

Homeownership Affordability

To understand housing affordability, we compare median household income to median home value.[9] Figure 24 shows the median home values for Bath County, the entire comparison region, and the other localities that comprise the entire comparison region. Bath County, with a median home value of $169,363, ranks below the region value of $181,766. There is a significant range in home values within the region; Lexington has the most expensive median home value at $261,298 and Covington has the least expensive home value at $76,801.

Figure 24: Median Home Value, 2019

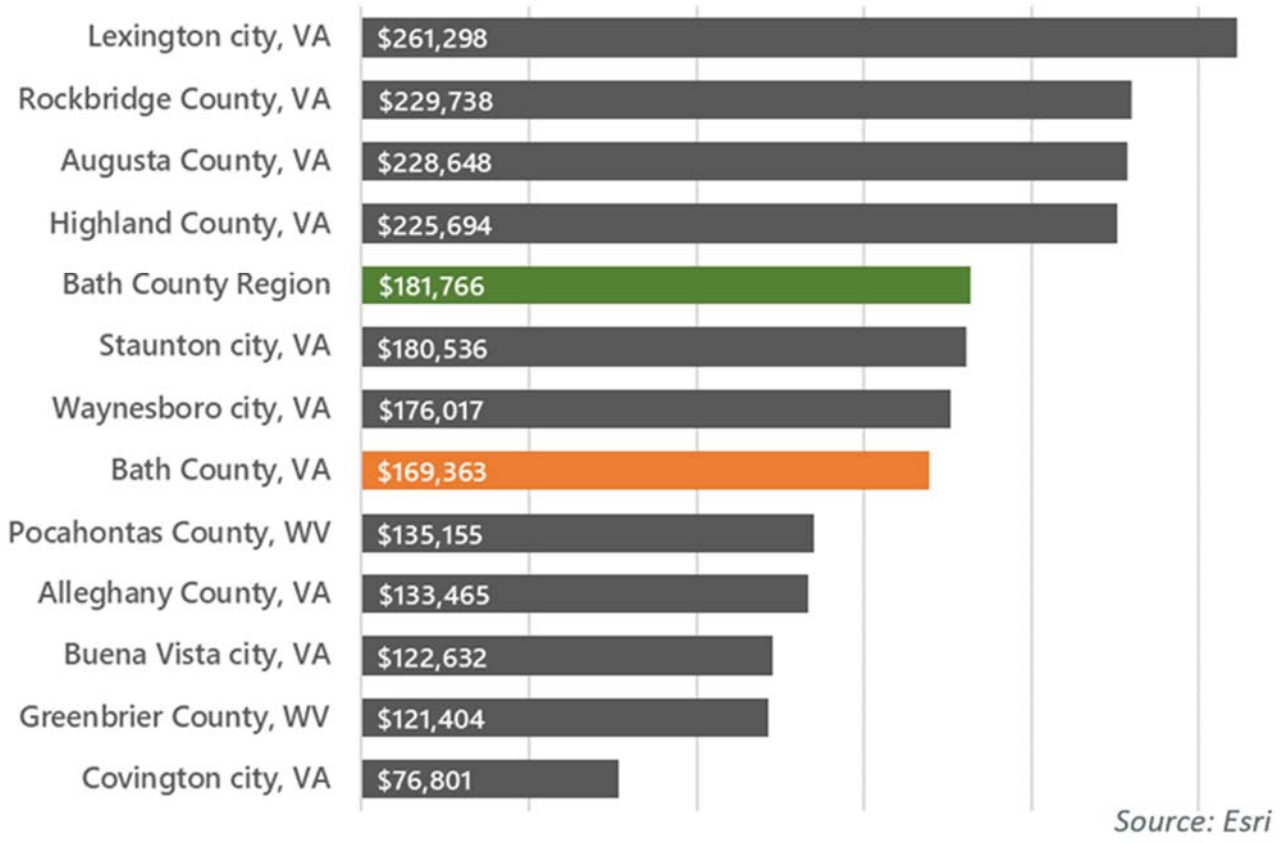


Figure 25 shows the distribution of home values in Bath County compared to the region, state, and country. This helps us understand what gaps there may be in the housing supply by comparing one geographic location to another. Bath County has a higher proportion of homes in the under $200,000 range than the other geographies. Further, the county has a smaller proportion of those homes in the $300,000 to $499,999 range than the other comparison geographies.

[9] Median home value is the value for all homes, not just homes currently for sale.

BATH COUNTY, VA

Figure 25: Distribution of Home Value

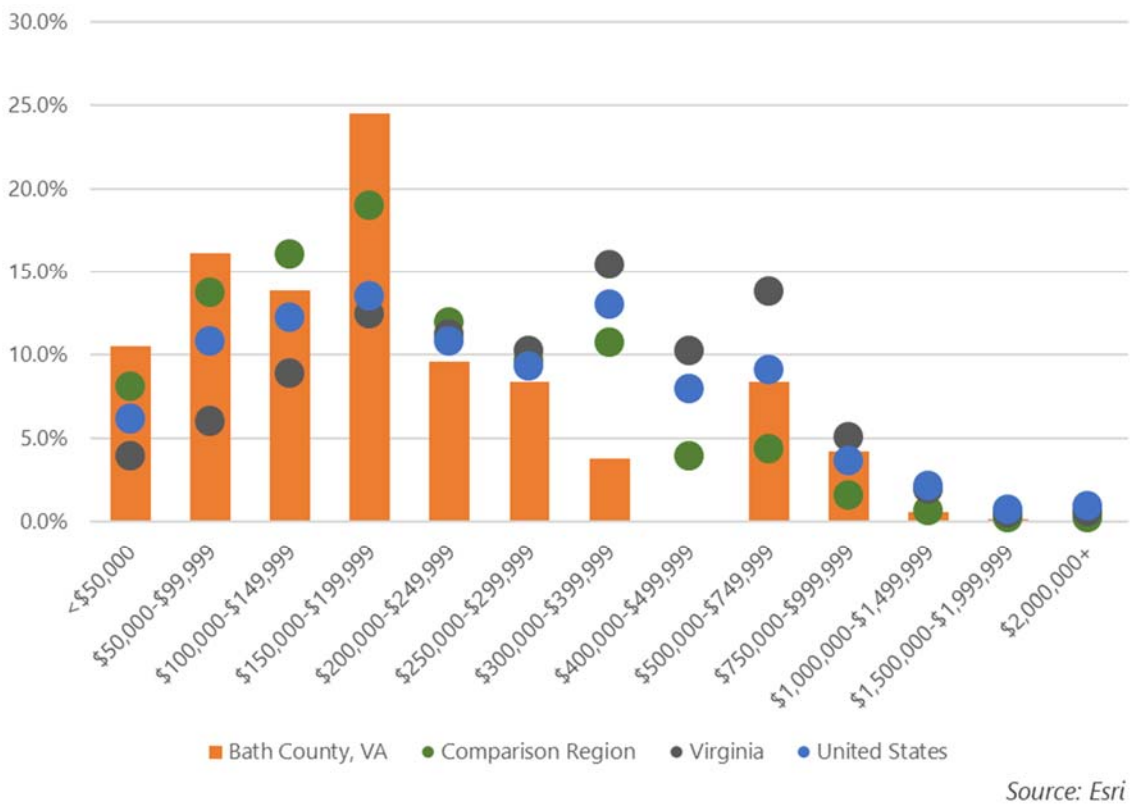


Figure 26 below illustrates the distribution of home values among Bath County homes. This provides a representation of the current housing stock within Bath County. The highest proportion of homes are in the $150,000 to $199,999 range, 24.5%. Sixty-five percent (65%) of homes are valued below $200,000.

Figure 26: Bath County Home Values, 2019

Value Range	#	%
<$50,000	162	10.5%
$50,000-$99,999	249	16.2%
$100,000-$149,999	213	13.8%
$150,000-$199,999	377	24.5%
$200,000-$249,999	147	9.5%
$250,000-$299,999	129	8.4%
$300,000-$399,999	58	3.8%
$400,000-$499,999	0	0.0%
$500,000-$749,999	129	8.4%
$750,000-$999,999	65	4.2%
$1,000,000-$1,499,999	9	0.6%
$1,500,000-$1,999,999	2	0.1%
$2,000,000+	0	0.0%
Total	1,540	100.0%

Source: Esri

BATH COUNTY, VA

Given Bath County's median home value of $169,363, we can estimate the gap or surplus when purchasing a median valued home with a median household income. For more information on the prices of homes sold in the county from 2016-2019, see Appendix A.

Figure 27 estimates an income of $42,080 is needed to purchase the median valued home in Bath County, assuming 30% of income is used for a monthly mortgage payment. This results in a $4,472 surplus given the current median household income of $46,552. We can therefore say homes are generally affordable within the county. However, this does not account for the quality of the homes available and availability of appropriately priced stock, i.e. just because the median values home is affordable does not mean that homes at this price point are available for purchase. For this, we examined the price of recently sold homes and homes available for sale.[10] As shown below, for homes currently on the market, the median price is not affordable give the median household income and results in a $36,248 deficit. The median price homes over $50,000 sold in Bath County from 2016-2019 indicate a median sale price of $127,248, resulting in an income surplus of $16,912. For more information on the prices of homes sold in the county from 2016-2019, see Appendix A.

Figure 27: Mortgage Income Surplus or Deficit: Median Home Price vs. Median Household Income

	Bath County	Bath County *Homes for Sale*	Bath County *Homes Recently Sold >$50,000*	Bath County Region
Median Price of Home	$ 169,363	$ 300,000	$ 127,248	$ 181,766
Down Payment of 10%	$ 16,936	$ 30,000	$ 12,725	$ 18,177
Loan Amount	$ 152,427	$ 270,000	$ 114,523	$ 163,589
Average Mtg Payment, 30 Years at 4%	$ 728	$ 1,289	$ 547	$ 781
Estimated Additional Costs per Mortgage Payment	$ 324	$ 781	$ 194	$ 343
Average Mtg Payment, 30 Years at 4% with Additional Costs	$ 1,052	$ 2,070	$ 741	$ 1,124
Household Income Threshold	$ 42,080	$ 82,800	$ 29,640	$ 44,960
Median Household Income	$ 46,552	$ 46,552	$ 46,552	$ 49,928
Income Surplus/Deficit	**$ 4,472**	**$ (36,248)**	**$ 16,912**	**$ 4,968**

Note: Estimated additional costs include private mortgage insurance, taxes, and insurance, for comparable priced houses within each region.

Source: Esri, Zillow, Camoin 310, Bath County

Figure 28 further indicates homeownership affordability. The Household Affordability Index shows the ratio of income need to purchase a home relative to the actual median household income. With an index of 111 we can say that the income needed to afford a median priced home is approximately 111% of the actual median income.

[10] "Homes for Sale" data from Zillow.com. Homes available for sale included those that have been on the market for the past year. "Homes Recently Sold" data from Bath County and includes those priced over $50,000 from 2016-2019. As sales data does not differentiate between land and homes, we used $50,000 as a cutoff point to filter out those probable land sales.

Figure 28: Homeownership Affordability, 2019

	Median Income	Income Needed to Afford Median Home Price	Index*	Median Home Price
Bath County	$ 46,552	$ 42,080	111	$169,363
Bath County Region	$ 49,928	$ 44,960	111	$181,766

Source: US Census

** This index measures housing affordability for the region. For example, an index of 111 means the median household income is 111% of what is necessary to purchase the median-priced home. A higher number means greater affordability.*

To further understand if housing is affordable, we examine the monthly homeownership costs as a percentage of household income, Figure 29. While 49.7% of homeowners pay less than 15% of their household income to homeownership costs, another 29.6% pay more than 30% of their household income. In general, households spending more than 30% of their household income on housing are referred to as cost-burdened households. Therefore, while the median figures indicate overall affordability, we see that 29.6% of Bath County households are cost-burdened and spend more than the affordability threshold of 30% of their household income on homeownership costs.

Figure 29: Monthly Homeownership Costs as Percentage of Household Income, 2017

	Bath County		Comparison Region	
	Units	% of Total	Units	% of Total
Less than 15.0%	672	49.7%	30,859	46.2%
15.0% to 19.9%	110	8.1%	9,839	14.7%
20.0% to 24.9%	134	9.9%	7,126	10.7%
25.0% to 29.9%	37	2.7%	5,220	7.8%
30.0% to 34.9%	103	7.6%	3,306	5.0%
35.0% or more	297	22.0%	10,412	15.6%
Total	1,353	100.0%	66,762	100.0%
More than 30%	**400**	**29.6%**	**13,718**	**20.5%**

Source: Esri

BATH COUNTY, VA

Rent Affordability

Figure 30, below, displays the distribution of rental properties by rent range. The highest proportion of rent paid is under $300 per month (28.9% of rents), followed by the $300-$499 cohort at 25.3%, and $500-$749 at 24.5%. There are currently no rental units in Bath County achieving rental rates of $2,000 or greater.

Figure 30: Bath County Distribution of Rent, 2017

Rent Range	#	%
<$300	112	28.9%
$300-$499	98	25.3%
$500-$749	95	24.5%
$750-$999	40	10.3%
$1,000-$1,499	14	3.6%
$1,500-$1,999	28	7.2%
$2,000+	0	0.0%
Total	387	100.0%

Source: Esri

The US Department of Housing and Urban Development calculates the Fair Market Rent[11] for counties across the country. According to this data, the rate for a one-bedroom apartment in Bath County is $485, including utilities. This is equivalent to the 40th percentile, or slightly below median rent. FMV is $633 for a two-bedroom apartment and $839 for a three-bedroom. At these rates, minimum required household income is approximately $19,400 for a one-bedroom, $25,320 for a two-bedroom, and $33,560 for a three-bedroom, all considerably below the overall median renter household income of $42,529 in Bath County. Using the Fair Market Value (FMV), and the median renter income, the Rental Affordability Index was calculated at 168, indicating the median renter income is 168% that needed to afford a two-bedroom apartment. See Figure 31.

Figure 31: Rent Affordability, 2017

	Median Renter Income	Income Needed to Afford 2 BR Rent	Index*	FMV 2 BR Rent (with Utilities)**
Bath County	$ 42,529	$ 25,320	168	$ 633

Source: US Census, HUD

** This index measures housing affordability for the region. For example, an index of 168 means the median household income is 168% of what is necessary to afford a 2 BR rental. A higher number means greater affordability.*

*** We used the Fair Market Value (FMV) rent figure for a 2017 2 BR apartment in Bath County, produced by the US Department of Housing and Urban Development*

[11] Fair Market Rent (FMR) is defined by the Department of Housing and Urban Development as the rent amount, including utilities (except telephone), to rent privately owned, existing, decent, safe and sanitary rental housing of modest (non-luxury) nature (40th percentile) with suitable amenities.

BATH COUNTY, VA

To further assess rental affordability, we examine gross rent as a percentage of household income using Esri Data, Figure 32. A majority of renters pay less than 15% of all household income towards rent, 72.1%. 8.6% of households pay over 30% of their income on gross rent, and 91.4% pay less than 30%. As the accepted assumption of home affordability is spending no more that 30% of income on housing indicating a cost-burdened household, we can say that 8.6% of households are cost burdened, paying more than 30%, and 91.4% of households earn incomes that makes rent affordable. However, while rentals are affordable, they are in short supply, may be of low quality, and are hard to find.

Figure 32: Bath County Gross Rent as a Percentage of Household Income, 2017

	Units	% of Total
Less than 15.0%	269	72.1%
15.0% to 19.9%	40	10.7%
20.0% to 24.9%	32	8.6%
25.0% to 29.9%	0	0.0%
30.0% to 34.9%	0	0.0%
35.0% or more	32	8.6%
Total	373	100.0%
More than 30%	**32**	**8.6%**

Source: Esri

HOUSING DEMAND

To estimate total housing unit demand, we must examine it within the context of the existing housing supply.

SUPPLY OF EXISTING UNITS

Recent Home Sales & Current Availability

A review of sale data provided by Bath County from 2016-2019 reveals a median sale price of $80,000 for all properties; however, this accounts for the sale of both homes and land lots. As county sales data does not differentiate between land and homes, we used $50,000 as a cutoff point to filter out those probable land sales. A review of available properties on Zillow.com (those available for the last year) reveal a median sale price of $300,000 with an average sale price of $410,250. As these homes currently on the market are more expensive, they are out of reach for the majority of Bath County residents. From this we can conclude the current supply of housing for sale is incongruent for many who live and/or work in Bath County.

Figure 33: Recently Sold Homes, Bath County

	All Sales	Sales >=$50,000
2016	$ 79,644	$ 113,500
2017	$ 80,000	$ 135,000
2018	$ 98,000	$ 135,000
2019	$ 110,000	$ 112,000
All	$ 80,000	$ 127,248

Source: Bath County

New Construction

As mentioned in Figure 21: Bath County Building Permits, 2000-2018, the number of housing permits issued has decreased steadily since 2000, when a total of 51 permits were issued. Comparatively, in 2018, there were just six permits issued. All housing permits issued were for single family dwellings, indicating no new supply of multifamily units, which are more likely to be rentals.

Available Rental Units

Year-round rental units, including those both occupied and vacant at the time of the ACS 2017 survey, account for 18% of Bath County's total housing stock.[12] Seasonal rental units account for 3% of the county's housing stock, which we extrapolated from the 2019 short term rental data as a proportion of the total housing units. In total, there are 708 rental units, 84% which are year-round rentals.

[12] Camoin 310 estimated an additional 23 units, or 25% of the rental stock available through online platforms.

Figure 34: Total Rental Units, Bath County 2017

	# Units	% of All Housing Stock
Renter Occupied	482	14.4%
For Rent - Vacant	75	2.2%
For Rent - Rented but Not Occupied	37	1.1%
Total Year-Round Rental Units	594	17.7%
For Seasonal Use	91	2.7%
Other Seasonal Rentals*	23	0.7%
Total Seasonal Rental Units	114	3.4%
Total Rental Units	708	21.1%

Source: ACS 2013-2017 5-Year Estimates

** Estimate from Camoin 310*

Based on these estimates, the approximate 114 seasonal rental units account for 10.2% of total seasonal units. The remaining 89.8% of seasonal units may be second homes that are used by the owners rather than rented out.

Figure 35: Total Seasonal Units, Bath County, 2017

	# Units	% of Seasonal Units
Total Seasonal Rental Units	114	10.2%
Total Seasonal Non-Rental Units	999	89.8%
Total Seasonal Units	1,113	100.0%

Source: ACS 2013-2017 5-Year Estimates, Camoin 310

A closer look at the vacant housing units in Bath County reveals that of the 393 otherwise vacant housing units, 248 units are "other vacant", or 7.4% of the total housing stock. This means that these year-round units are vacant for reasons such as the settlement of an estate, personal reasons, being prepared to rent or sell, or held for repairs.

Figure 36: Vacant Housing Units, Bath County, 2017

	# Units	% of Total Units
Otherwise Vacant	393	11.7%
For Rent	75	2.2%
For Sale	70	2.1%
Other Vacant	248	7.4%

Source: ACS 2013-2017 5-Year Estimates

In some cases, these other vacant units represent units that could potentially be converted to year-round rental units. It is unrealistic to assume that all 248 units could become year-round rental units, as owner preferences, unit condition, or legal reasons could prevent these units from being converted to year-round rentals. Additionally, price pressures and potential revenue generation from the seasonal rental market cause many homeowners to choose to rent their units with seasonal pricing, rather than at an affordable year-round rate. Therefore, we conservatively estimate that between 5% and 10% of other vacant units could be converted to year-round rental units. This equals between 12 and 25 new units. Going forward, it will be important to communicate with the owners of the "other

vacant" units to identify which units are available for conversion to year-round rental units. Key to this communication is understanding what it would take for the owners to rent out these properties.

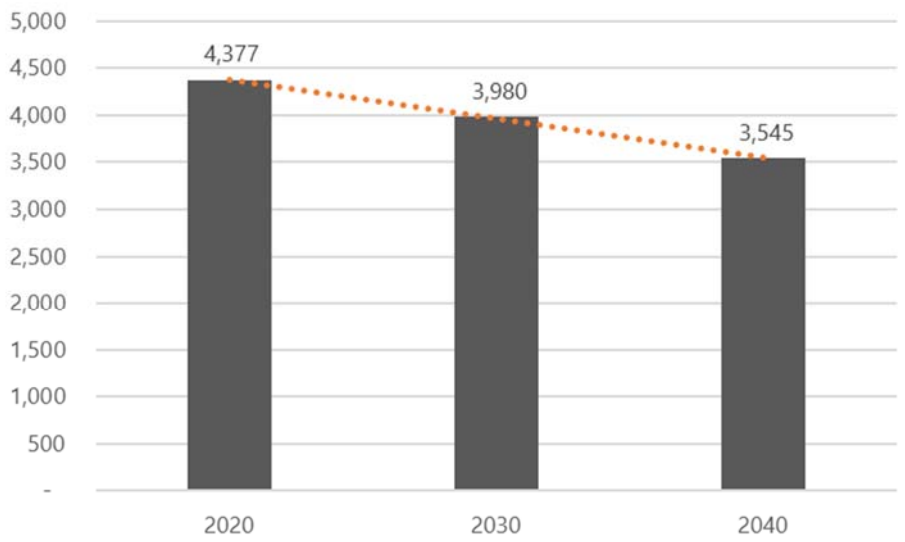
DEMAND FOR UNITS

Future Population Analysis

Demographic and population estimates show that it is unlikely that an influx of new residents will significantly contribute to increasing demand for housing; therefore, the focus should be placed on satisfying pent-up demand from existing residents and workers and creating conditions that will attract new people.

Projections from the University of Virginia anticipate that the year-round population of Bath County will gradually decline through 2040. It is estimated that the population will decline by 832 residents between 2020 and 2040 to 3,545, a decline of 19%.

Figure 37: Bath County Projected Population



Source: University of Virginia Weldon Cooper Center for Public Service

Further analysis of population projections through 2024 from Esri shows that populations with household incomes of less than $75,000 will shrink, while those with incomes above $75,000 will increase, particularly those making $100,000-$149,999. Change in the number of households by age will decrease among all age cohorts except those aged 65-74 and those over age 75. This points to a need for a continuum of senior housing options within the county. For regional context, the Bath County Region will see similar trends. Depending on senior housing initiatives, this could position the county for initiatives to draw from a wider region when it comes to creating a range of senior housing options.

BATH COUNTY, VA

Figure 38: Bath County Change in Households by Income and Age of Householder, 2019-2024

	<25	25-34	35-44	45-54	55-64	65-74	75+	Total
<$15,000	(1)	(4)	(5)	(8)	(15)	(8)	3	(38)
$15,000-$24,999	(1)	(3)	(3)	(4)	(12)	(13)	(8)	(44)
$25,000-$34,999	(3)	(5)	(6)	(9)	(11)	(11)	1	(44)
$35,000-$49,999	(1)	(6)	(6)	(17)	(13)	(1)	14	(30)
$50,000-$74,999	(2)	(4)	(6)	(14)	(7)	8	7	(18)
$75,000-$99,999	0	0	1	(1)	3	2	4	9
$100,000-$149,999	0	(1)	16	7	12	29	22	85
$150,000-$199,999	0	0	1	4	7	10	9	31
$200,000+	0	0	(1)	2	0	0	1	2
Total	(8)	(23)	(9)	(40)	(36)	16	53	(47)

Source: Esri

Figure 39: Bath County Region Change in Households by Income and Age of Householder, 2019-2024

	<25	25-34	35-44	45-54	55-64	65-74	75+	Total
<$15,000	9	(268)	(134)	(308)	(541)	(162)	320	(1,084)
$15,000-$24,999	(54)	(269)	(152)	(270)	(457)	(238)	137	(1,303)
$25,000-$34,999	(49)	(283)	(160)	(307)	(378)	(157)	239	(1,095)
$35,000-$49,999	0	(191)	(59)	(280)	(326)	96	370	(390)
$50,000-$74,999	27	(201)	70	(282)	(235)	457	411	247
$75,000-$99,999	21	10	261	46	113	380	430	1,261
$100,000-$149,999	24	99	451	185	277	482	442	1,960
$150,000-$199,999	8	39	172	125	174	205	211	934
$200,000+	5	12	92	116	110	163	96	594
Total	(9)	(1,052)	541	(975)	(1,263)	1,226	2,656	1,124

Source: Esri

This population shift will have economic and social implications for Bath County, as a greater share of the population enters retirement and the workforce shrinks. Gains in the number of senior and wealthier households are cancelled out by losses in younger and middle-aged households. If housing supply and costs continue on a similar trajectory, the working-age population will continue to decrease, and the aging of the population will accelerate.

Populations to Address

Our research reveals that there are several population groups that may be targeted for housing. For the purposes of this analysis, we will target seniors (those aged over 65) and workforce populations (people who work in Bath County but may live elsewhere and generally younger, middle-income people, including young families seeking their first homes).

Workforce/In-Commuters

According to 2017 US Census OnTheMap data, the most recent year for which data is available, 56% of Bath County workers work in the county but live elsewhere ("in-commuters") and 44% of workers live in Bath County. By applying

these percentages to 2019 Emsi employment data (including self-employed), we estimate that approximately 1,399 workers in-commute and 1,099 workers live in the county.[13]

Figure 40: Bath County Year Round Workers

	% of Workers (2017)	# of Workers (2019)
Workers In-Commuting	56%	1,399
Workers Employed and Living in Study Area	44%	1,099
Total Workers	100%	2,498

Source: U.S. Census OnTheMap, EMSI

Findings from the worker survey reveal many workers and their families would like to live in Bath County but ultimately seek housing in other locations where they are able to find available units and can often get more space for their money. This does not mean that all of these workers would be interested in living in the Bath County if housing was available and at an affordable price point. Many workers may still commute in from outside of the county for various reasons – another member of the household may work in an opposite direction, a desire to be close to family members, ties to their existing school district and community, etc. However, for a subset of this group, their ideal place of residence is Bath County. Of the survey respondents, 28% of those not currently living in the county would be interested in moving to the county if the right housing was available. For the purposes of this analysis, we use a conservative assumption that 10-25% of commuters in this subset would like to live in Bath County to serve as a reasonable estimate of the number of new year-round homes needed in the county.

The appropriate price points to attract these in-commuters depends on their earnings. According to the 2017 Census data, 20% of in-commuters earn $1,250 or less per month ($15,000 or less annually), 51% of in-commuters earn between $1,251 and $3,333 per month (approximately between $15,001 and $40,000 annually), and 30% of in-commuters earn more than $3,333 per month (or more than approximately $40,000 annually). When considering the 1,399 estimated in-commuters, this means that 274 in-commuters earn less than $15,000 annually, 711 in-commuters earn between $15,001 and $40,000 annually, and 414 in-commuters earn more than $40,000 annually. These figures represent earnings of individual workers, and not total household income. In other words, the earnings of other individuals in the household are not considered.

Figure 41: Monthly Earnings of Bath County In-Commuters

Monthly Earnings	Annual Equivalent	Count	Share
$1,250 or less	$15,000 or less	274	19.6%
$1,251-$3,333	$15,001-$40,000	711	50.8%
Greater than $3,333	Greater than $40,000	414	29.6%
Total		1,399	100.0%

Source: U.S. Census OnTheMap, Camoin 310

[13] US Census OnTheMap data does not include self-employed workers. Therefore, differences are expected between the 2019 estimates in Figure 40 and commuter counts in Figure 11.

BATH COUNTY, VA

The below chart shows the amount that in-commuters can afford to spend on housing in three different earnings groups. The amount that in-commuters can afford to spend on housing (rent and utilities) ranges from less than $375 to over $1,000 (assuming housing costs to be 30% of income).

Figure 42: In-Commuter Housing Affordability

Earnings Group	# In-Commuters	Monthly Earnings	Amount to Spend on Housing
Low	274	$1,250 or less	$375 or less
Medium	711	$1,251-$3,333	$376-$999
High	414	Greater than $3,333	$1,000+

Source: U.S. Census OnTheMap, Camoin 310

We examined likelihood to rent or buy based on income level and estimate that overall, about two-thirds of in-commuters would be likely to own and one-third likely to buy. This is consistent with responses from the worker survey that indicated more interest in for-sale rather than rental properties. In total, we estimate that of the 1,399 in-commuters, 10-25% would be interested in moving their households to Bath County, or about 140 to 350 households. Of these, 101-248 would be likely to own and 52-129 would be likely to rent.

Living Arrangements for Young Adults and Seniors

In addition to in-commuters, examining where and how people currently live within the county can uncover additional demand for housing for the senior and workforce target markets. Data from the U.S. Census Bureau was used to consider those who live in the county but do not live independently, or those that do live independently but may eventually need housing that provides additional assistance. Specifically, data pertaining to the young adult and senior cohorts were analyzed.

Young adults are most likely early in their careers and potentially seeking rental housing or to purchase a home. These "under-housed" residents are workers who live in the county but may be young workers who still live at home with their parents. According to the 2017 American Community Survey, 279 individuals age 18 to 34 in the county either live with their parents, live with other relatives, or live with other nonrelatives.[14] This represents 42% of Bath County's age 18 to 34 cohort. When looking at the total adult population of the county (which includes the age 18-34 group), less than half of the population, 20%, live with others (parents/relatives/nonrelatives).

For the senior cohort, those aged over 65, 31% or 231 people live alone, 64% or 473 people live with a spouse, and 3% or 20 people live with an unmarried partner. While spouses may be able to care for each other as the aging process progresses, eventually there needs to be residential options that provide more care for those that choose it. While "aging in place," or growing older in a life-long home is typically the optimal choice for seniors, moving into a facility not only increases availability of services and opportunities for companionship, it also opens up housing options for younger workers and their families.

[14] This excludes individuals who live alone, live with a spouse, or live with a partner (unmarried).

Figure 43: Living Arrangements, Bath County, 2017

	Age 18-34		Age 65+		Total Adult Population	
	#	% of Age	#	% of Age	#	% of Adult Population
Lives Alone	52	7.8%	231	31.1%	555	16.4%
Living with Spouse	147	22.1%	473	63.7%	1,829	54.1%
Living with Unmarried Partner	186	28.0%	20	2.7%	331	9.8%
Living with Parents	218	32.8%	-	0.0%	278	8.2%
Living with Other Relatives	43	6.5%	-	0.0%	335	9.9%
Living with Other Nonrelatives	18	2.7%	18	2.4%	55	1.6%
Total Living with Others (non spouse/partner)	279	42.0%	18	2.4%	668	19.7%
Total	664	100.0%	742	100.0%	3,383	100.0%

Source: ACS 2013-2017 5-Year Estimates

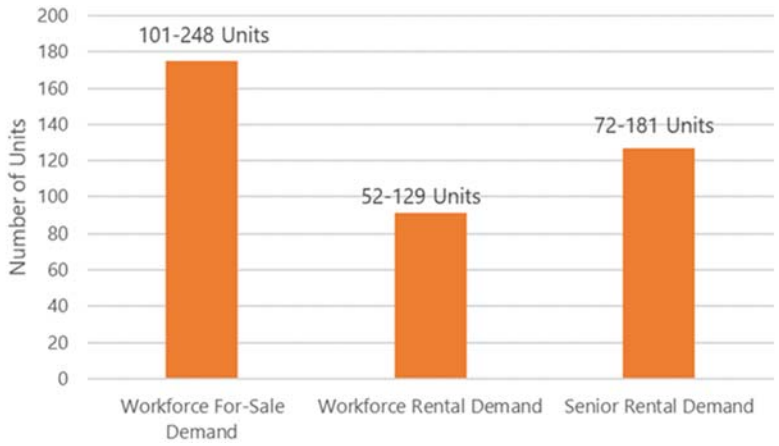
A higher percent of young adults living with parents, relatives, or friends is in line with state and national trends. Those who would voluntarily continue to live with relatives may be attending school, saving money for a down payment or other purchase, paying off loans, caring for a family member, or requiring care themselves. Oftentimes these young adults are unable to afford to move out of their parents' home, which can be a hindrance to employment. The inability to find an affordable year-round rental leads to attrition among workforce availability and prevents employers from being able to attract new employees.

By using living arrangement data as a proxy for under-housed workers and senior housing, we can quantify the additional demand for year-round units that these markets could support. Based on qualitative data, we believe that approximately 5-10% of adults age 18-34 living with others would live independently if they could find adequate housing. We assume 75% of these young adults would rent and 25% would purchase a home. For additional senior housing, we assume all new senior housing would be rentals. Of those seniors that live alone and with a partner, we conservatively estimate 10-25% of this combined group being willing to move into a senior, age-restricted facility as a rental.

Total Demand Summary

Figure 44 summarizes the demand for affordable year-round rental housing units by in-commuters and under-housed resident workers; this demand is combined in the workforce for-sale demand and workforce rental demand columns. In addition, senior rental demand is also shown.

Figure 44: Total Demand Summary for Bath County

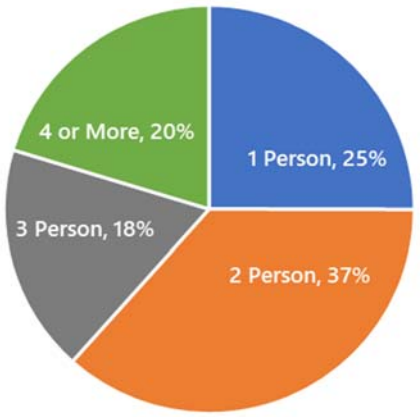


BATH COUNTY, VA

We assume the majority of the senior housing to be one- or two-bedroom apartments. To determine preferred bedroom counts for the workforce units, we examined household size of the county's working population, the target demographic of this analysis. Of Bath County's working population, 37% of households are two-person households. This is followed by one-person households (25%), four-or-more-person households (20%), and three-person households (18%).

Through the Bath County Employee Survey, we found that multi-bedroom units (two- and three-bedroom) are in high demand. Figure 46 displays the results of this survey and shows the average number of bedrooms needed for each household size of survey respondents. The average number of bedrooms needed by respondents is 2.7 bedrooms.

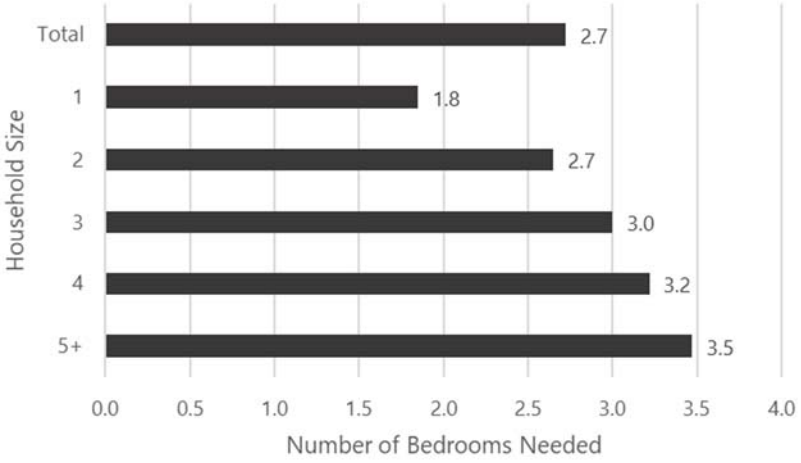
Figure 45: Worker Household Size, 2017



Source: ACS 2013-2017 5-Year Estimates

Based on the household size of the working population, as well as on information gathered through the employee survey, we estimate that there is rental demand for between 5 and 13 one-bedroom rental units, between 21 and 52 two-bedroom rental units, and between 26 and 65 three-bedroom rental units. For homes for purchase, we estimate that there is demand for between 35 and 87 two-bedroom units, between 56 and 136 three-bedroom units, and 5 and 10 four-bedroom units.

Figure 46: Number of Bedrooms Needed by Household Size



Source: Camoin 310, Bath County Employee Survey

Figure 47: Demand by Bedroom Count

For-Sale Workforce Housing		
# of Bedrooms	# of Units	% of Units
2	36-91	35%
3	58-142	55%
4	7-15	10%
Total	**101-248**	**100%**

Workforce Rentals		
# of Bedrooms	# of Units	% of Units
1	5-13	10%
2	21-52	40%
3	26-64	50%
Total	**52-129**	**100%**

Source: Camoin Associates

To estimate price ranges for in-demand units, we examined income data for Bath County in-commuters, existing Bath County residents, and worker survey respondents. This enabled us to divide demand for for-sale and rental units into a series of price ranges based on the maximum price points that households of various income brackets would be able to afford.

It should be noted that survey respondents' desired price points are significantly below what they could reasonably afford assuming a maximum of 30% of income goes towards housing (including utilities). These estimates were developed under the assumption that homebuyers and renters would be willing to pay up to this maximum amount.

Figure 48: Bath County Housing Unit Demand by Price Range

For-Sale Workforce Housing		
Price Range	# of Units	% of Units
Less than $100,000	6-14	6%
$100,000 - $124,999	12-26	11%
$125,000 - $149,999	17-43	18%
$150,000 - $199,999	13-32	14%
$200,000 - $249,999	17-43	18%
$250,000 - $299,999	18-45	19%
$300,000+	18-45	19%
Total	101-248	100%

Workforce Rentals		
Price Range	# of Units	% of Units
<$200	5-12	10%
$200-$400	5-12	10%
$400-$600	12-27	23%
$600-$800	20-52	38%
$800-$1,000	7-18	13%
$1,000+	3-8	6%
Total	52-129	100%

Senior Rentals		
Price Range	# of Units	% of Units
<$200	7-18	10%
$200-$400	12-30	17%
$400-$600	9-23	13%
$600-$800	18-46	25%
$800-$1,000	14-34	19%
$1,000+	12-30	17%
Total	72-181	100%

BATH COUNTY, VA

For those respondents to the survey who indicated they are interested in looking for a different place to rent or purchase (69.6% of all respondents), the figures below indicate respondent price range by number of rooms needed. Please note that respondents could choose multiple choices for price ranges.

Figure 49: Number of Survey Responses - Home Purchase Price Range by Number of Bedrooms Needed

	Less than $100,000	$100,000 - $124,999	$125,000 - $149,999	$150,000 - $199,999	$200,000 - $249,999	$250,000 - $299,999	$300,000 - $399,999	Total
1	1	0	1	0	0	0	0	**2**
2	16	11	7	4	1	2	1	**42**
3	22	24	12	12	10	1	0	**81**
4	1	4	2	4	4	2	1	**18**
Total	**40**	**39**	**22**	**20**	**15**	**5**	**2**	**143**

Source: Bath County Employee Survey

The price ranges for rentals skewed in $650 and lower ranges, about 70% of all responses with about 30% in the $650 to $1000 price range. For purchase, about 60% of respondents chose home prices of less than $125,000; about 30% indicated a purchase budget of $125,000 to $199,999; and 10% indicated a budget of $200,000 to $249,999. See Figure 49 and Figure 50.

Figure 50: Number of Survey Responses - Home Rental Price Range by Number of Bedrooms Needed

	Less than $500	$500 - $649	$650 - $799	$800 - $999	$1,000 - $1,499	Total
Studio/1	3	2	2	0	0	**7**
2	12	15	5	2	1	**35**
3	19	20	9	8	1	**57**
4	1	4	0	4	2	**11**
Total	**35**	**41**	**16**	**14**	**4**	**110**

Source: Bath County Employee Survey

KEY FINDINGS: EMPLOYER & EMPLOYEE SURVEY

To understand how the current housing situation in Bath County may be impacting employers and employees in the county, we created an online survey for both parties. Some of these findings have been used in combination with data analysis to draw conclusions for housing demand. There were 22 responses to the employer survey and 168 responses to the employee survey.[15] Key findings are highlighted below:

Employer Survey Findings

- 41% of respondents operate a hotel, bed and breakfast, or other accommodation, followed by 9% running a restaurant or bar and 9% running a tourism or recreation business.
- 96% of respondents have a business that operates all year.
- Businesses have a range of employees, from 1 to 970 depending on the time of year. Of the 22 responses, 12 had 2-6 employees.
- 50% of employers indicated at least 75% of their employees work more than 30 hours per week.
- 32% of employers reported monthly wages between $2,000 and $2,999; 27% between $3,000 and $3,999; and 27% between $1,000 and $1,900.
- The positions that are especially difficult to fill include: culinary/chef and other food prep; housekeeping; skilled positions; and part-time positions. Several respondents indicated all positions were hard to fill.
- Among all respondents, if workers were available employers would have hired an additional 187 workers.
- 60% of all respondents indicated it was difficult for their workers to find housing. Within Bath County, 73% of respondents indicated it was difficult for their workers to find housing.
- 64% of employees do not provide compensation for housing; 32% do and 5% provide temporary or weekend housing. Employers that do offer housing offer 1-108 units.
- 82% of employers agree or strongly agree that finding adequate housing that is affordable is a major challenge for <u>all</u> employees.
- 89% of employers agree or strongly agree that finding adequate housing that is affordable is a major challenge for their <u>year-round</u> employees.
- 67% of employers agree or strongly agree that finding adequate housing that is affordable is a major challenge for their seasonal employees.
- 32% of employers agree or strongly agree that access to transportation is a major challenge for employees.
- 73% of employers agree or strongly agree that the lack of affordable housing options in Bath County negatively impacts job recruitment.
- 64% of employers agree or strongly agree that the lack of affordable housing options in Bath County negatively impacts their business.
- 82% of employers believe more single-family rental housing is needed in Bath County; this is followed by 50% thinking single-family, owner occupied housing is needed; 46% of employers believe more multifamily apartments are needed; and, 41% of employers believe townhouses are needed.

[15] There are approximately 235 businesses in Bath County and 5,847 workers. Source: Esri population forecast for 2019.

BATH COUNTY, VA

Worker Survey Findings

- 87% of respondents work full time in Bath County. 6% work full time between two employers and 4% work part time with one employer. 85% of employees work all year.
- 74% of respondents' primary residence is in Bath County. 36% grew up in Bath County, 20% are from another state not VA or WV, 19% are from outside the county or region but within VA or WV, and 18% are from within 50 miles of VA or WV. 7% are from another country.
- 38% of respondents have two people in their household. 20% have 3, 20% have 1, 14% have 4.
- Half of employees work in the hotel, bed and breakfast, or other accommodations. 19% work for a healthcare or health services provider.
- Half have a commute of less than 10 miles. 31% travel 10 to 24 miles to work and 16% travel 25 to 50 miles to work one-way.
- 64% of respondents own their own home. 30% rent. The remaining 6% live in employer housing, with family, or in another situation.
- People choose to live in Bath County because that is where they are from (34%). 33% choose to live in the county to be near their job. 20% live in the county to be close to a partner, family, or friends.
- The distribution of what people pay for housing (via rent or mortgage) range as follows: 30% pay less than $500 per month; 20% pay between $500-$649; 19% pay between $650-$799; 13% pay $1,000-$1,499; and 12% pay $800-$999.
- 32% of respondents felt it was very difficult to find adequate housing (in Bath County or elsewhere). 28% felt it was somewhat difficult, 15% chose N/A, and 11% chose neither easy or difficult.
- 84% of respondents feel there are a lack of housing options in Bath County.
- Respondents feel single family rental are the type of housing most needed (73%). This is followed by single family, owner occupied (51%); townhouse rentals (46%); and multifamily apartments (41%).
- For amenities, employees feel shopping (68%), restaurants (54%), and a movie theatre (53%) are the services that are missing from the county.
- If appropriate housing were available, 26% of respondents would live in Bath County. Ideal home types include single family owner occupied (63%); single family rental (33%); townhouse rentals (14%); and townhouse owner-occupied (11%).

STAKEHOLDER INTERVIEW THEMES

Camoin 310 conducted eight interviews with a variety of stakeholders about the state of housing in Bath County. These interviewees included business owners and managers in a variety of industries, including hotels, restaurants, health care, and manufacturing, as well as members of the real estate community and a representative of the school district. A community meeting was also held on September 25, 2019, that was attended by approximately 20 individuals. Themes from these interviews and the community meeting are summarized as follows:

- Rental units are very difficult to find and are typically filled through word of mouth. Rental units are not typically advertised, as property owners are often hesitant to rent to "strangers." New residents moving into the county find it virtually impossible to find rental housing without a personal connection. As a result, employers often must dedicate resources to locating housing for their employees.
- Lower-earning workers struggle to find affordable rental housing in Bath County and often must commute into the county from elsewhere. This greatly limits the pool of workers for employers.
- For-sale homes at price points "in the middle" (between approximately $100,000 and $200,000) are few and far between. The majority of houses on the market are either geared toward second homeowners and out of the price range of the typical Bath County worker, or are affordable but are dated, low quality, and/or in need of significant rehabilitation and repair.
- The largest drivers of demand for workforce housing are the Omni, the hospital, and the school district. Some of the county's employers provide housing directly to their employees as a way to guarantee a supply of labor. It is a common occurrence for prospective employees to turn down employment offers because they cannot find adequate and affordable housing.
- Construction costs in the county are high relative to the surrounding area due to its remoteness. It is difficult to find contractors, and it often takes significantly longer than what is typical to complete construction jobs. This impacts the cost of housing.
- Some perceive both a physical and psychological divide between the eastern and western sides of Bath County which tends to split the county into two submarkets. Newcomers who find jobs in Hot Springs or Warm Springs have a strong preference to live nearby and are not willing to commute over the mountain from Millboro, where housing is more available and more affordable.
- Year-round rentals are being converted to short-term rentals, further constraining the rental housing stock. This is particularly true in areas close to visitor attractions, especially Hot Springs. Property owners can often profit more from renting their property out a few weeks or weekends a year to visitors than they can from renting year-round to residents.
- Uncertainty around the future of the Omni Homestead has diminished with investments in rehabilitation recently underway. There is a general sense of optimism that people will now be more willing to make investments in the county, including its housing stock.
- Many recognize housing availability and affordability as a critical factor for stemming population aging and decline and attracting new, younger workers and families to put down roots in Bath County.

LAND SUITABILITY ASSESSMENT

The purpose of the Land Suitability Assessment is to evaluate the county's capacity to support residential development from the standpoint of site availability and zoning, physical infrastructure availability and capacity, and capacity to provide necessary services. The Housing Need Analysis phase of the study quantified an unmet need for 225 to 558 housing units in the county. This demand will be best met through a combination of new residential construction as well as rehabilitation and renovation of existing housing units in need of modernization. The following information outlines the county's capacity to accommodate this demand.

Potential Sites

Findings from stakeholder interviews and surveys point to the greatest need for new housing units in the vicinity of Hot Springs and Warm Springs, where the majority of the county's jobs are located. Secondary locations include Bacova and Millboro. Through discussions with county representatives, the following sites were identified as having strong potential for housing development.

- **Future Visitor Center Site, Mitchelltown** – Eight-acre county-owned site across from Valley Supermarket IGA in Mitchelltown, well located on Route 220 between Hot Springs and Warm Springs. Current plans for the site include the development of a county visitor center on a portion of the site. The remainder of the site could potentially be used for moderate density residential development. May require rezoning.
- **Main Street, Hot Springs –** Vacant lots and buildings.
- **Mountain View Terrace, Hot Springs –** Infrastructure-served lots available for residential development. R3 "Medium Density Residential" zoning, which allows for single-family, two-family, multifamily, and townhouse residential development. Located off Virginia Avenue, approximately 1 mile northwest of the center of Hot Springs.
- **Cedar Woods Subdivision, Cedar Creek –** Thirteen infrastructure-served lots of approximately 0.17 to 0.29 acres, available for residential development. Originally platted in 2013 but never developed. R4 "Low Cost Residential" zoning, which allows for manufactured home parks and subdivisions. Located off Route 687/Jackson River Turnpike, about 7 miles southwest of Hot Springs.
- **Millboro Industrial Park Site** – There are several large unsold infrastructure-served sites ranging from 10 to 38 acres within the Millboro Industrial Park that could be used for residential development. The sites are owned by the Bath County Economic Development Authority.
- **Millboro Elementary School Parcel** – Sixty-acre site zoned R3 "Medium Density Residential" with space for housing development. There is water and sewer capability within the area.

Infrastructure Capacity

Discussions with county staff indicate that the county has enough wastewater and water capacity to support additional housing demand for the foreseeable future in the areas identified for development. However, it should be noted that deferred maintenance on certain lines has led to leaks and other issues that need to be addressed in order to ensure adequate service.

Wastewater

As of March 2019, the four wastewater facilities in the county have combined excess capacity to serve 528 new ERCs, or equivalent residential connections. The extension of the Cedar Creek facility will extend capacity by an additional 48 ERCs. The Hot Springs facility, which serves the area with the most demand for housing, can support 342 additional ERCs.

Figure 51: Wastewater Capacity

Wastewater Capacity				
Facility	Ownership	Rated Capacity (gallons per day)	Average Usage (gallons per day)	Available Capacity (ERC)*
Hot Springs	Bath County Public Service Authority	450,000	325,000	342
Cedar Creek	Bath County Public Service Authority	15,000	4,000	34
Millboro	Bath County Public Service Authority	50,000	14,000	112
Warm Springs	Warm Springs Sanitation	80,000	30,000	40

*ERC = equivalent residential connection

Source: Bath County; Warm Springs Sanitation

Water

As of March 2019, the county's eight water facilities have combined excess capacity to serve at least 1,239 new ERCs, excluding capacity in the Hot Springs Water Company system, which is owned by Omni Homestead. Usage of the Hot Springs Water Company system is currently at about 75%. Once capacity exceeds 80%, plans for expansion of the system would need to be developed. The Bath County Regional facility, which serves Muddy Run to Hot Springs, Warm Springs, West Warm Springs, Bacova Junction, and Route 621, has excess capacity to serve 783 ERCs.

Figure 52: Water Capacity

Water Capacity				
Facility	Ownership	Rated Capacity (gallons per day)	Average Usage (gallons per day)	Available Capacity (ERC)*
Bath Co. Regional	Bath County Public Service Authority	269,440	182,500	783
Clifton Forge Mtn	Bath County Public Service Authority	93,600	24,000	14
Cedar Creek	Bath County Public Service Authority	86,000	22,500	119
Thomastown/Switchback	Bath County Public Service Authority	70,000	66,250	64
Ashwood	Bath County Public Service Authority	19,600	10,000	42
Millboro (Public)	Bath County Public Service Authority	50,000	6,000	197
Millboro (Private)	Millboro Water Association	not available	158 units	20-30**
Hot Springs	Hot Springs Water Company (Omni Homestead)	994,000	750,000	unknown***

*ERC = equivalent residential connection

**As estimated by Millboro Water Association

***795,200 gpd is 80% of the design capacity. If the waterworks is unable to maintain a demand less than 80% then they will need to expand their water system or will be unable to provide for new connections.

Source: Bath County; Millboro Water Association; Omni Homestead

School System

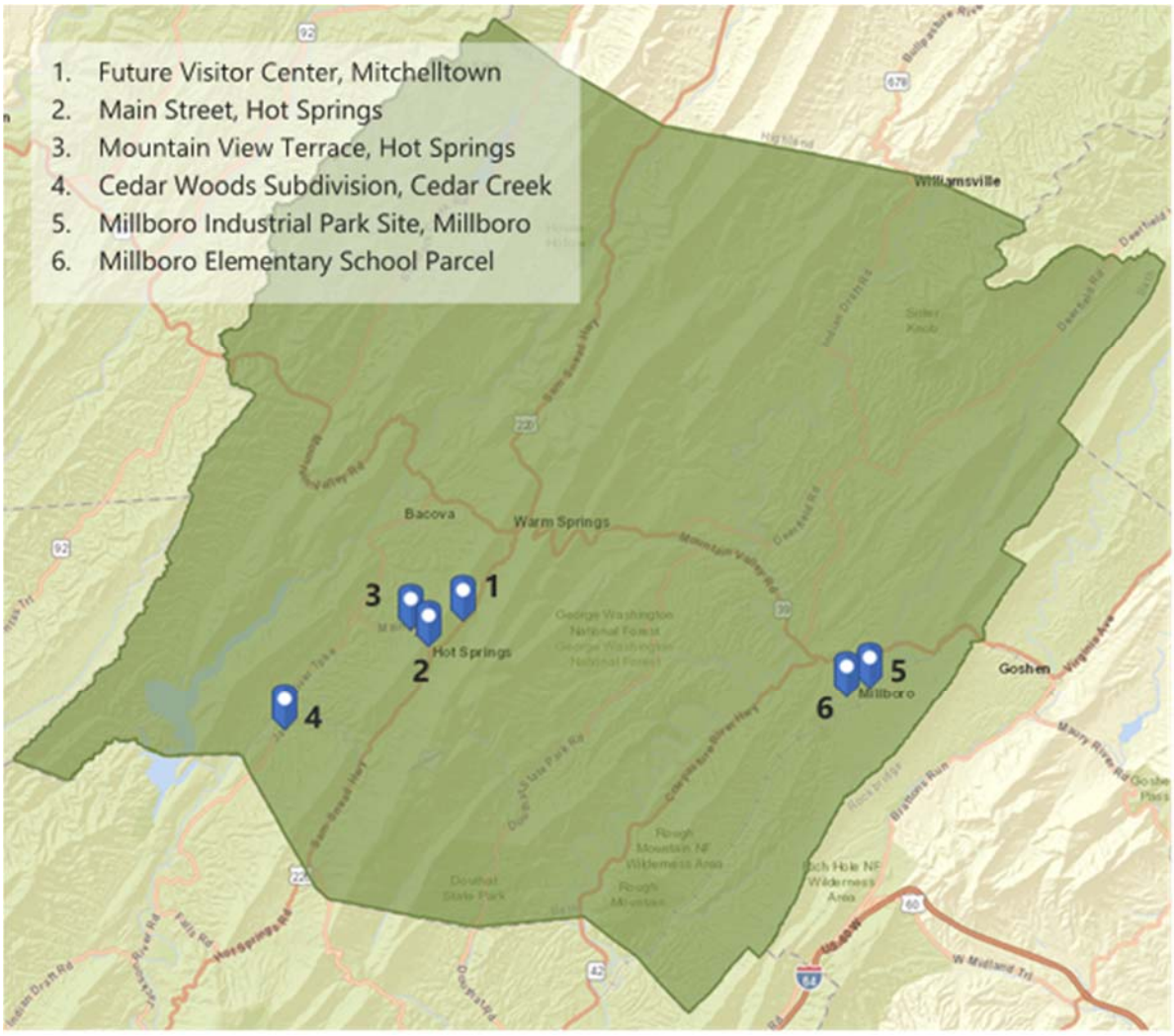
According to data provided by Bath County Public Schools, the school system is currently at about 61% capacity. There is excess physical capacity to accommodate 318 new students across the system's three school facilities. Additional teachers and support staff would need to be hired.

Figure 53: School Capacity

School Capacity			
School	Enrollment Capacity	Nov. 2019 Enrollment	Available Capacity
Bath County High School	295	189	106
Millboro Elementary School	193	134	59
Valley Elementary School	329	176	153
Total	817	499	318

Source: Bath County Public Schools

Figure 54: Location of Potential Housing Development Sites



STRATEGY RECOMMENDATIONS

Taken together, the Demographic and Economic Analysis, Housing Needs Analysis, Employee and Employer Survey, Stakeholder Interviews, and Land Suitability Analysis paint a picture of the housing situation in Bath County. In short, there is not enough quality housing at needed price points to support the existing year-round and seasonal workforce. The purpose of this section then, is to provide actionable items that can shift the housing story of Bath County toward creating more housing and create the organizational capacity to coordinate these efforts.

Above all else, the County and partners need to increase its internal capacity to systematically improve and increase the housing stock. We recognize this work will take a coordinated effort between agencies, developers, county offices, and nonprofit entities. These strategy recommendations, then, focus on creating the systems needed to increase and improve Bath County's housing stock. Through this coordinated effort, the County and its partners can create programs that work to drive up and improve housing units in Bath County. We recommend programs that directly affect housing for the county's workforce to increase opportunities for both home ownership and home rentals. The indirect benefit of creating more workforce, year-round housing is to reverse the overall trend of population decline.

In addition, the housing needs of both the senior and seasonal population should be addressed. The County and its partners need to prepare for an aging community and the impending shift in housing needs. By creating a range of senior housing options in Bath County, it allows senior community members to get the care they need in the community they are familiar with. This not only serves the needs of the elderly population but also opens up and increases the supply of housing for the county's workforce. By producing additional seasonal housing units, it supports the main economic generator of the county and 1) allows major tourism employers to draw the employees they need and, 2) frees up housing that could otherwise be used for year-round rentals.

The following recommendations provide a framework to engage the findings of this study to meaningfully create the programs and structures needed to house programs and facilitate projects to mitigate and reverse the housing needs in the county.

1) **Promote the formation of a county or regional partnership group to coordinate existing housing programs and partnerships.** This partnership group can take the findings of the Housing Needs Assessment and Market Analysis Study and bring them back to their "home" organizations. Review lessons learned from past projects, explore possibilities for larger-scale housing solutions that will benefit the entire region, and identify ways resources can be leveraged. The group could explore the creation of a housing trust for the county or region. A housing trust is a land trust that supports the development and stewardship of permanently affordable homes. The partnership could establish annual meetings with affordable housing developers to understand their current projects and needs, as to facilitate partnership for developing year-round rentals and/or permanent housing.

   The group could also investigate creating a Workforce Housing Partnership. The purpose of a Workforce Housing Partnership would be to solicit local businesses to support affordable housing with in-kind and financial support. Supporters know that, by providing affordable housing options, it means more potential availability of future employees, and a reduced commute for current employees. In addition, the group could create a sub-committee specifically for senior housing. For their first task, they could view senior housing developments around the state and talk to developers about what they look for in a site. This would help narrow in on the types of housing and assistance levels most desired by the senior community.

Examples:

- Island Housing Trust, MA http://www.ihtmv.org/donate/workforce-housing-partnership/
- Clendenin, WV created a non-profit organization in order to renovate a historic school building to include senior housing and a medical clinic. They utilized USDA Community Facilities Loans, USDA Rural Business Enterprise grants, and state and federal Historic Tax Credits https://www.rural-design.org/blog/housing-rural-america-funding-rural-affordable-housing-and-community-revitalization

2) **Increase coordination to develop effective relationships and partnerships with all the housing entities.** In addition to the formation of a committee, we see a potential need for an additional staff person to coordinate all housing efforts within the county. This person would help identify and apply for federal, state, and other funding; work with partners to understand gaps in services; and help educate other community partners what resources exist to increase the supply of workforce housing in the county. This person could be full- or part-time, sharing a full-time position with neighboring jurisdictions, or staff assistance from the Planning District Commission.

3) **For targeted and/or larger sites, work on site readiness to expedite housing development.** To the extent possible, work with developers of larger or target sites to prepare for site development. This may include reimbursing for site renderings, waiving fees, performance-based tax incentives, or otherwise expediting the permitting process.

   Example: Fairfax, VA. This can be modified to meet the needs of Bath County. https://www.fairfaxva.gov/home/showdocument?id=6707. They also provide a certified list of design professionals for code compliance prior to submission to the county. https://www.fairfaxcounty.gov/landdevelopment/expedited-building-plan-review-program

   Example: Manassas, VA. This example is for commercial plan review but could be modified for Bath County relating to residential developments. https://www.manassascity.org/DocumentCenter/View/23325/Expedited-Commercial-Plan-Review-Program?bidId=

4) **Use a land-trust model to encourage home ownership.** A land trust is a legal entity that raises funds to purchase land from a property owner for a specific use, usually in perpetuity. While the land trust owns the land, they allow certain functions to occur, such as farming, for conservation, or affordable housing. By owning the land and the rights to the land, the land-trust provides an affordable opportunity for home ownership. Bath County would need to create an administering organization to purchase the underlying land, which then lessens the financial burden of the potential homeowner as they are only responsible for purchasing the building structures and improvements made. As the land holder, the land-trust would have the right to purchase any structures built on the property. These typically involve a 99-year lease on the underlying land.

   Example: Charlottesville, VA and the Thomas Jefferson Community Land Trust. https://tjclt.org/

5) **Establish landlord and tenant education.** With the understanding that a higher quality rental draws a higher quality tenant and higher rent, create educational materials that point to this. Create tenant education information so tenants understand their rights when it comes to rental issues. Add language and resources to partner websites. Work with local real estate agents and banks to establish a good renter training program. Resources about the Virginia Residential Landlord and Tenant Act (VRLTA) can be found here:

https://www.vhda.com/Renters/Pages/RenterRightsResponsibilities.aspx and resources about the Fair Housing Law can be found here http://www.dpor.virginia.gov/FairHousing/.

Example: The Virginia Fair Housing Office is offering landlord trainings around the state in 2020: http://www.dpor.virginia.gov/FairHousing/VFHO_Class_Schedule/

6) **Facilitate the process for finding available housing in Bath County**. Utilize existing online platforms and link to the County website where available properties for rent or sale can be found.

7) **Increase familiarity with existing federal and state housing programs.** A number of federal and state housing programs exist that could be tapped by local elected officials, developers, home owners, renters and other agencies. It is important to learn more about these programs and determine how well they align with the housing needs of Bath County. A good starting point is to review "Meeting Housing Needs in Rural Virginia", https://www.housingvirginia.org/wp-content/uploads/2017/04/HV-RuralReport.pdf. This report includes best practices throughout Virginia (pages 47-58). In addition, become familiar with programs from the Virginia Housing Development Authority (VHDA), the Department of Housing and Community Development, and the Virginia Housing Toolkit (https://www.housingvirginia.org/).

8) **Understand and promote how structures can be repurposed or modified to create multi-unit housing.** While there is zoning in place that allows additional units such as Accessory Dwelling Units, to what extent are these incentivized, encouraged, and understood by Bath County residents? Additionally, how easy is the process of subdividing lots and equipping new lots with the necessary infrastructure to build? Create language on the County's website that simplifies code language and highlights the benefits of creating a year-round rental unit or subdividing. Work to provide incentives (or tax abatement) and a streamlined permitting process to facilitate this type of redevelopment. Also explore VHDA programs for repurposing buildings for housing (found here: https://www.vhda.com/Programs/Pages/Programs.aspx).

9) **Assist with the homebuying process.** Work with local banks to establish mortgage education and loan programs that makes the homebuying process easier and more affordable. Many models exist and include paying for PMI, providing mandatory education on budgeting and saving for a home, and/or reducing or waiving lawyer fees or inspection fees (by working with a local provider). In some communities, the county has acted as lead and, by receiving federal funding such as CDBG grants, are able to help banks offer low interest loans to qualifying individuals. These programs could be geared toward first time home buyers, those who work in Bath County, or any other criteria established. This could be the work of a future staff person.

10) **Continue and expand a home improvement program for existing homeowners.** Prioritizing lower income homeowners, provide an incentive for housing upkeep. Could be a Tax Credit program or Matching Grant program. Once established, create a marketing campaign to get the word out and highlight success stories in digital and print media.

11) **Explore establishing a program that provides property tax exemption/abatement for owners of older properties who rehabilitate and provide affordable year-round rental housing.** Qualified property owners that are determined by the County and its partners would provide an abatement for those wanting to rehabilitate and rent their property at a rate also determined in program development. The example in Richmond below evaluates the Rehabilitation Tax Abatement program in place since the 1990s, which allows an abatement for rehabilitation on all property types over 20 years old. While that program focuses on all

property types, Bath County could focus solely on single family and/or multifamily structures and could also offer an additional benefit/longer abatement for those renting at a certain income level.

Example: Richmond, VA https://cura.vcu.edu/media/cura/pdfs/cura-documents/RVARehabTaxAbatement(FINALE).pdf

12) **Identify potential sites for redevelopment.** Establish inventory of existing vacant and underutilized properties and engage with property owners of large and accessible parcels regarding likelihood of sale. Conduct preliminary financial proforma to understand gaps in financing and potential incentives required. Release an RFP for development specifying the development desired.

13) **To open up year-round housing for year-round residents and seasonal employees, create smaller-scale housing such as studio and efficiency type housing.** Collaborate with large employers, the senior community, and developers to ascertain particular interest in this type of development.

Examples:

- Newfield, NY: https://www.secondwindcottages.org/
- Vail Resorts, CO: https://www.prnewswire.com/news-releases/vail-resorts-announces-30-million-commitment-to-new-employee-housing-projects-in-mountain-resort-communities-300186993.html
- Greensboro, NC: https://www.greensboro.com/news/local_news/greensboro-debuts-tiny-home-community-to-address-affordable-housing-issues/article_dc63bf33-b968-5381-88b9-34f92bb216fb.html

14) **To provide affordable new housing, consider partnering with companies that produce system-built, prefabricated/modular construction houses**. These houses are not mobile homes, rather, they are assembled on foundations. Sections of such houses are crafted off site and transported to permanent locations for assembly and occupancy. Consider recruiting a firm to establish a production facility at the Millboro Industrial Park to help meet housing needs. Develop an incentive package to attract this type of business that would create additional employment and housing in the area.

APPENDIX A: ADDITIONAL TABLES

Population by Year, 1990-2018		
Year	Bath County	Bath County Region
1990	4,790	205,808
1991	4,786	207,115
1992	4,799	208,641
1993	4,861	210,016
1994	4,906	211,110
1995	4,954	212,652
1996	4,997	213,741
1997	4,967	214,996
1998	5,026	215,834
1999	5,052	217,027
2000	5,048	217,787
2001	4,997	218,123
2002	5,012	219,002
2003	4,974	220,289
2004	4,934	221,822
2005	4,891	223,370
2006	4,823	225,829
2007	4,835	227,561
2008	4,778	228,250
2009	4,743	228,002
2010	4,721	227,756
2011	4,655	228,420
2012	4,642	227,922
2013	4,592	228,268
2014	4,535	227,966
2015	4,456	227,993
2016	4,399	228,277
2017	4,285	228,813
2018	4,292	229,204

Source: US Census

Source: Bath County

BATH COUNTY, VA

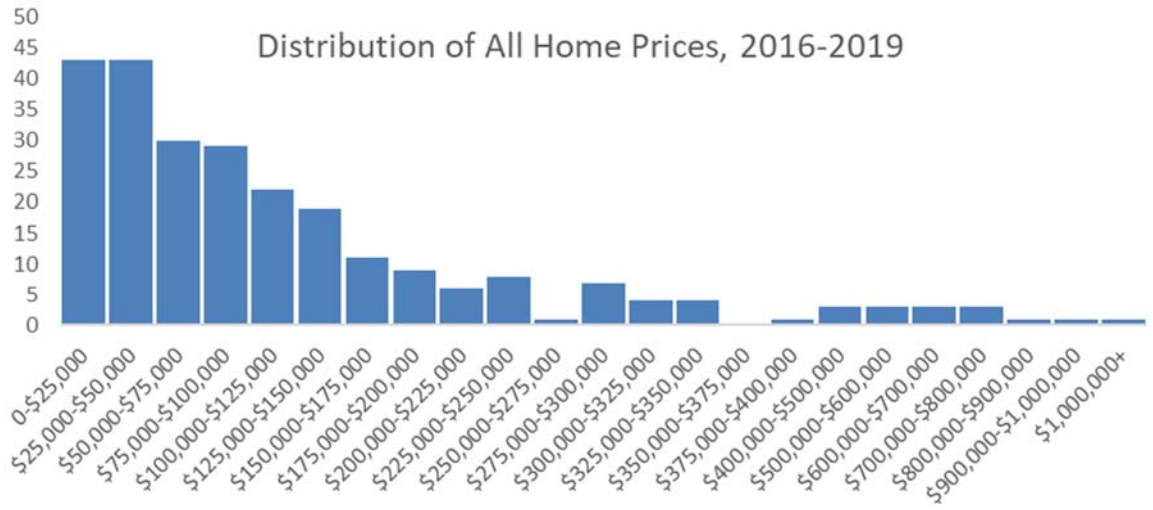
2019 Median Age	
Alleghany County, VA	48.6
Augusta County, VA	45.2
Bath County Region	45.3
Bath County, VA	51.2
Buena Vista city, VA	39.0
Covington city, VA	44.6
Greenbrier County, WV	47.0
Highland County, VA	56.4
Lexington city, VA	24.4
Pocahontas County, WV	50.0
Rockbridge County, VA	48.8
Staunton city, VA	43.7
Waynesboro city, VA	40.0
Virginia	38.8
United States	38.5

Source: Esri

Median Sale Price Class 2 Sales, Bath County

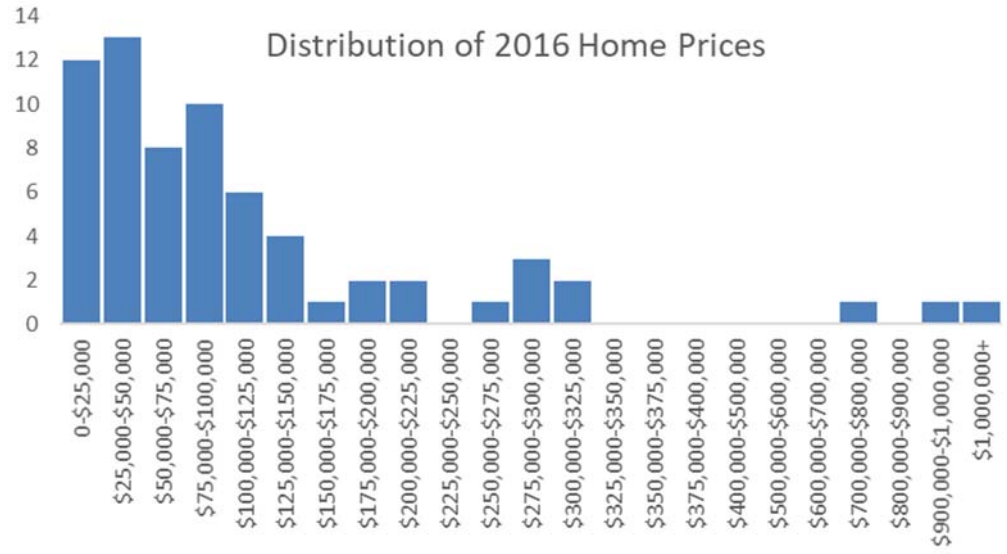
	All Sales	Sales >=$50,000
2016	$79,644	$113,500
2017	$80,000	$135,000
2018	$98,000	$135,000
2019	$110,000	$112,000
All	$80,000	$127,248

Source: Bath County



Source: Bath County

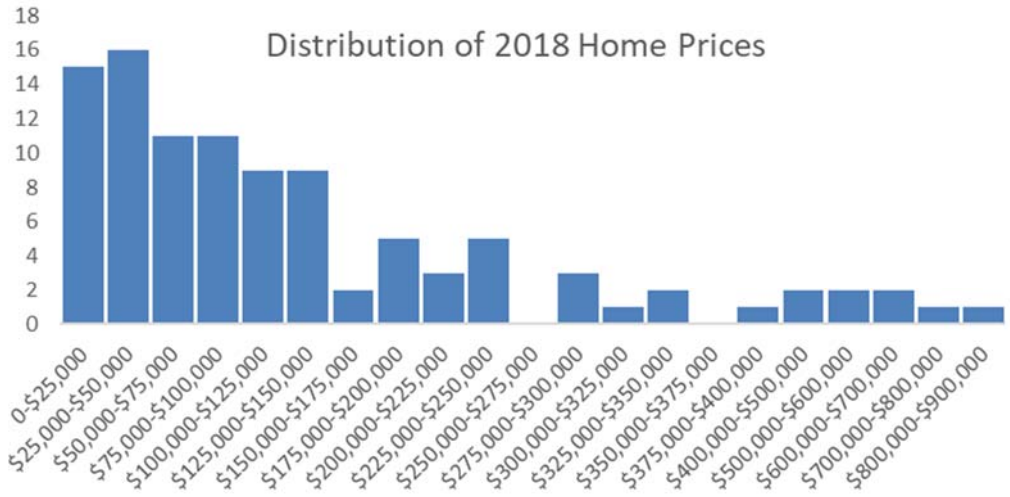
BATH COUNTY, VA

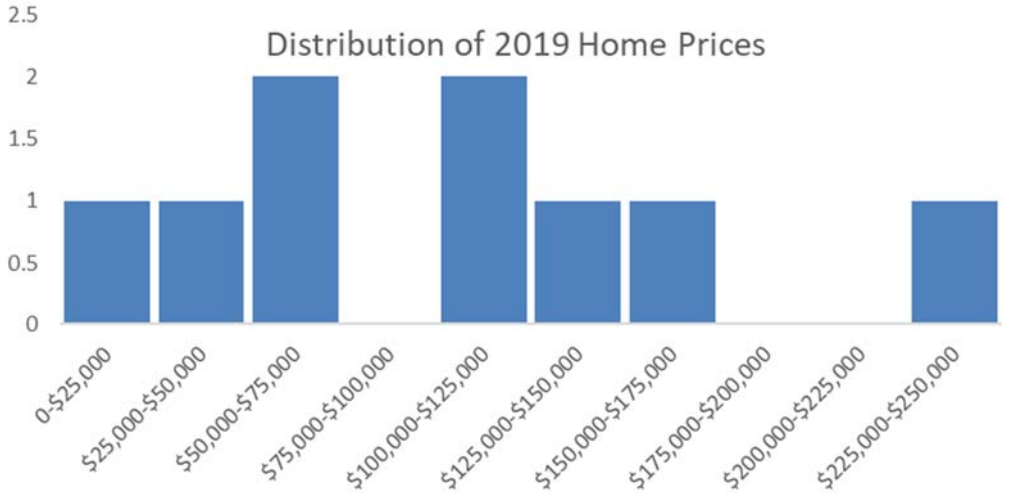


Source: Bath County

Source: Bath County

BATH COUNTY, VA



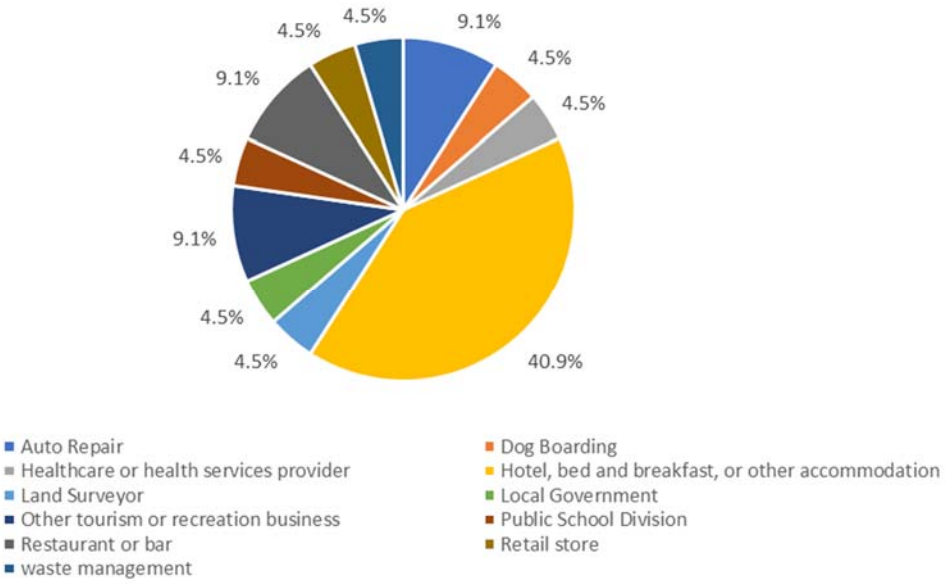


APPENDIX B: SURVEY RESPONSE SUMMARY

Housing Survey for Bath County Employers

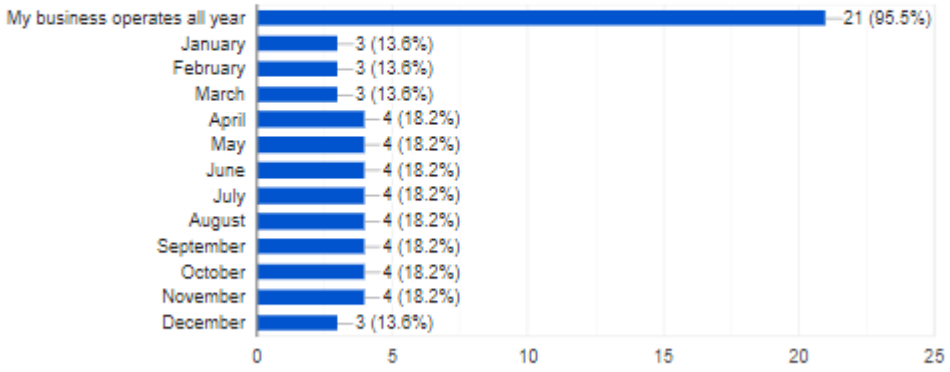
Select the establishment type that most closely describes your business.

22 responses



During which months does your business operate? Please answer based on the current year (2019). Check all months that apply.

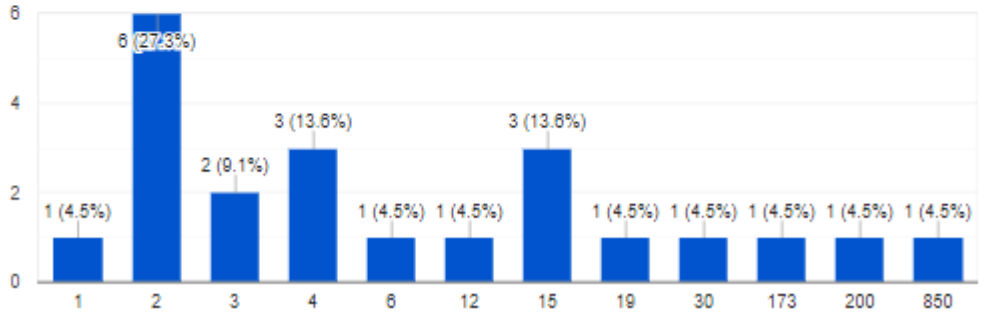
22 responses



Number of employees

January - March 2019

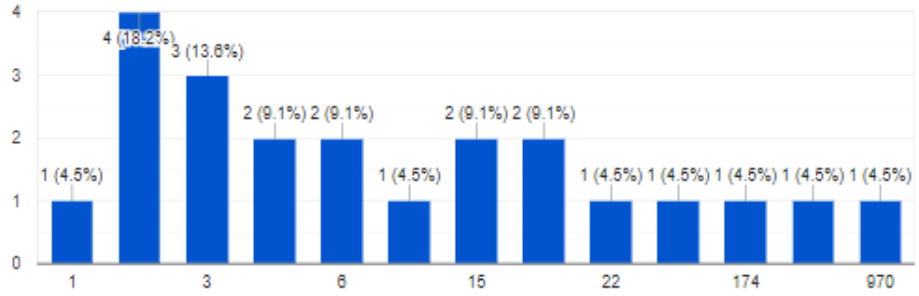
22 responses



BATH COUNTY, VA

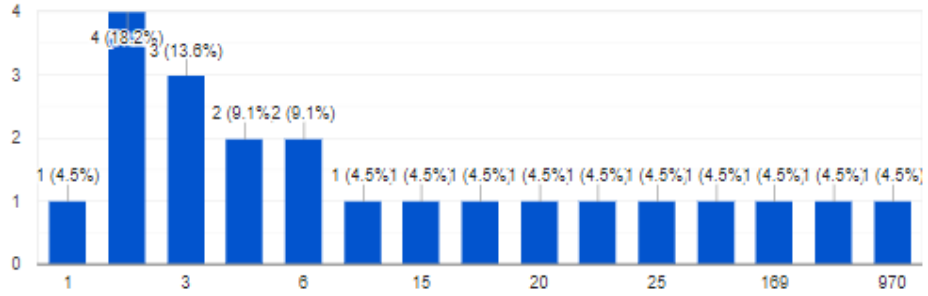
April - June 2019

22 responses



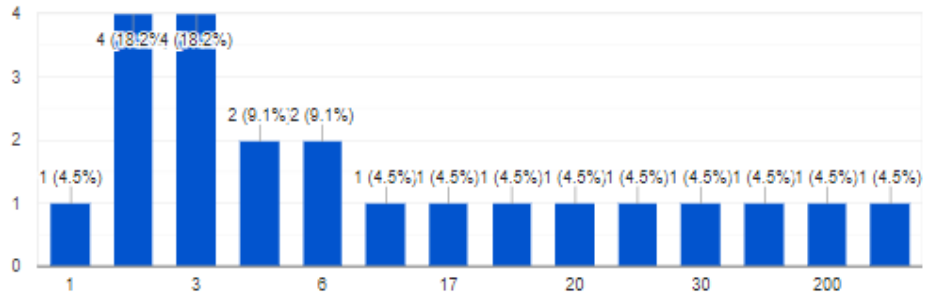
July - September 2019

22 responses



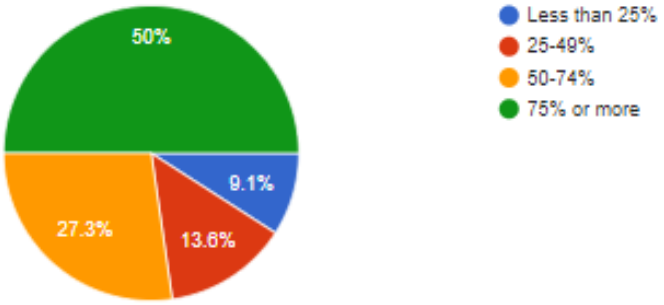
October - December 2019

22 responses



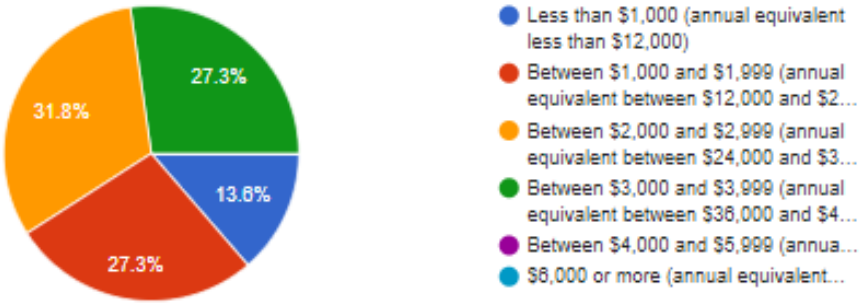
Considering all workers employed by your company in 2019, approximately what percentage of employees worked 30 or more hours per week?

22 responses



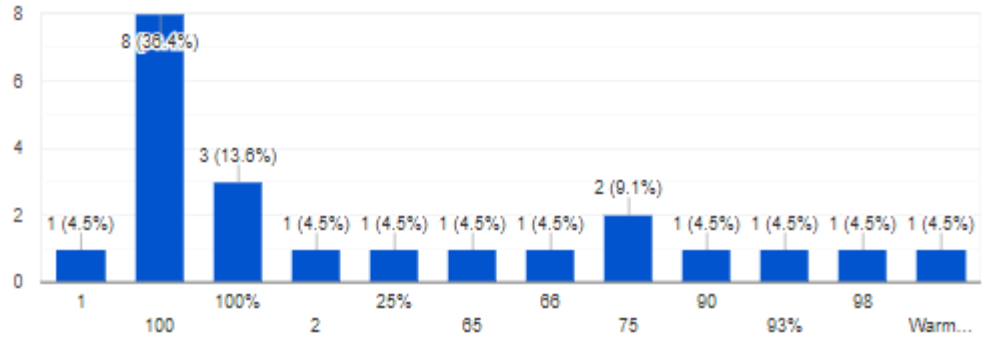
What is/was the average gross monthly wage of your employees in 2019? Include tips.

22 responses



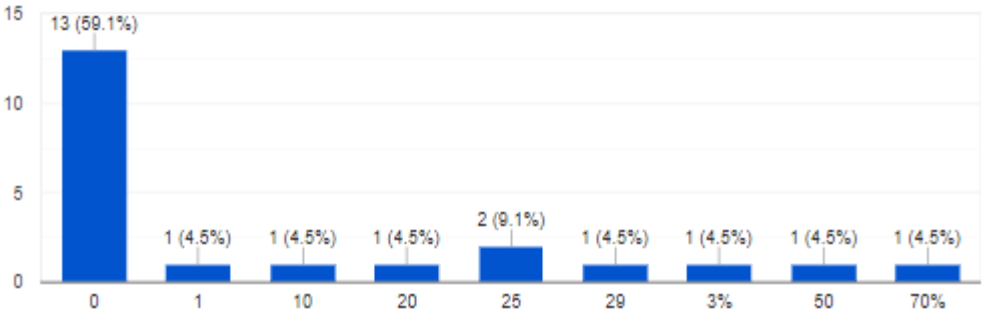
Considering all workers employed by your company in 2019, estimate the percentage of employees who are permanent residents of Bath County. (Example: If 10% of your employees are permanent residents of Bath County, enter 10).

22 responses



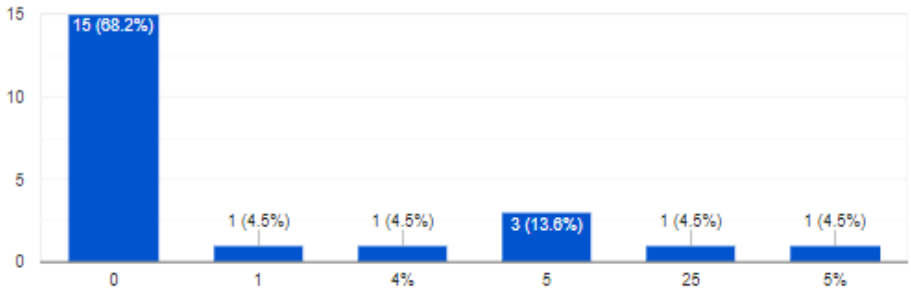
Enter the percentage of employees who are not permanent residents of Bath County, but live within 50 miles of the county.

22 responses



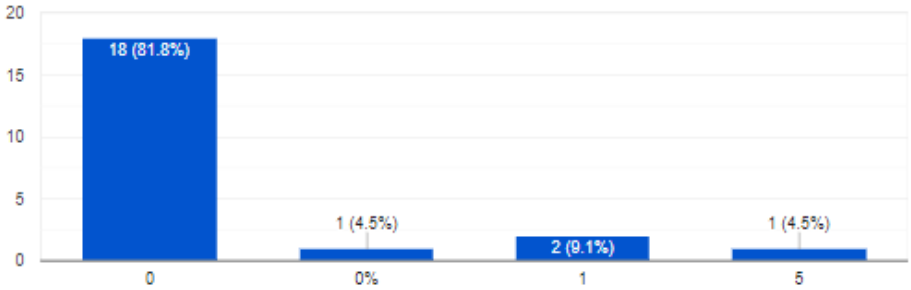
Enter the percentage of employees whose permanent residency is further than 50 miles from the county, and within the US.

22 responses



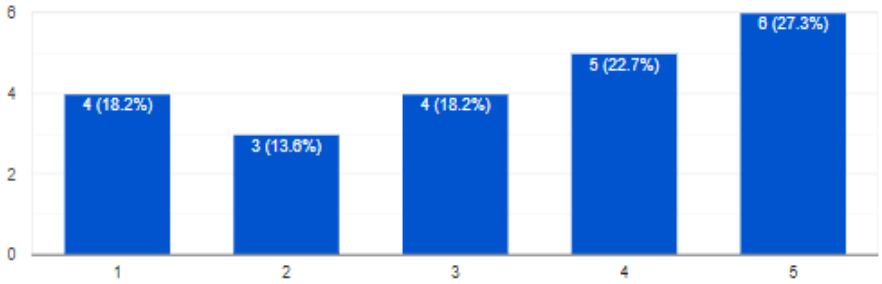
Enter the percentage of employees whose permanent residency is outside the US.

22 responses



On a scale of 1 to 5, how difficult is it for you to attract and retain employees?

22 responses



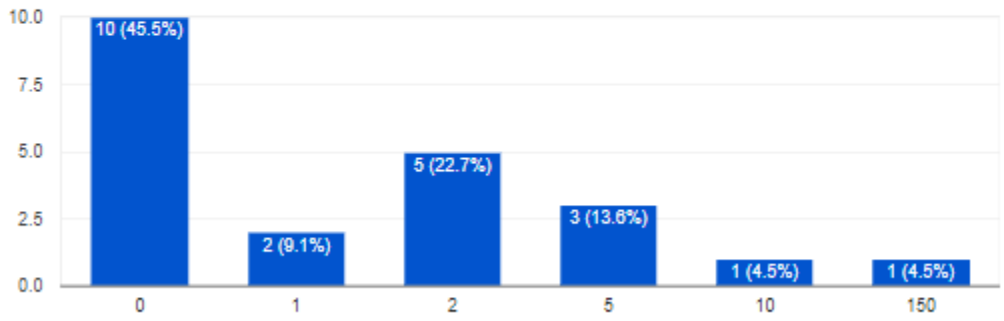
Which types of positions are especially difficult to fill?

22 responses

- All
- This is a start up and I've had lots of people want to come work for me
- Culinary
- none
- skilled
- auto collision
- N/A
- Professional Classical Musicians, Chef, Development
- Innkeeper
- housekeeping
- Part time is difficult to fill
- none at this time
- Professional teaching staff moving to the county find it difficult to find acceptable and affordable housing. Offers for employment have been declined when the candidates cannot find a place to live.
- Housekeeping
- all
- Nurses
- Housekeeping
- food prep (cooks) and housekeepers
- forestry positions
- SKILLED
- Hourly and managerial

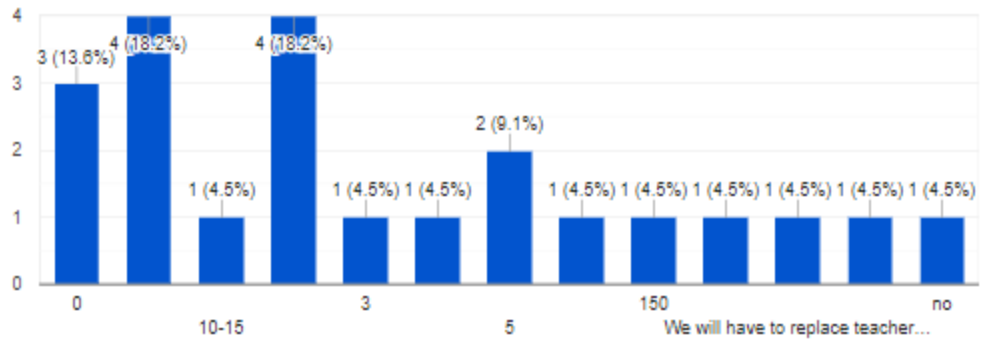
In 2019, how many ADDITIONAL workers would you have hired if labor was more readily available?

22 responses



Over the next 5 years, how many workers do you plan to add to your Bath County business location(s)?

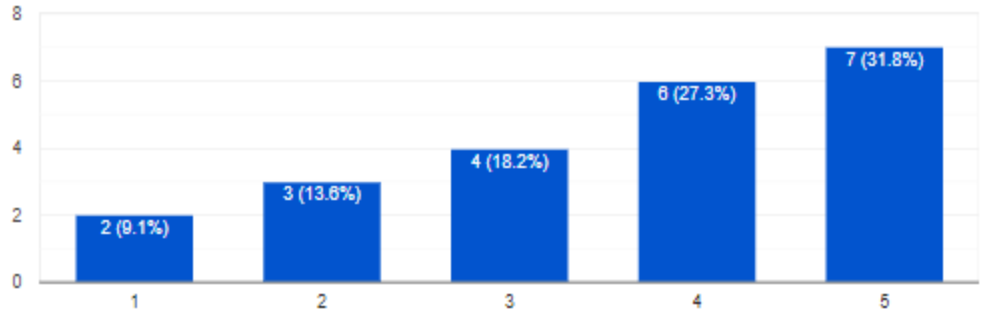
22 responses



Workforce and Housing

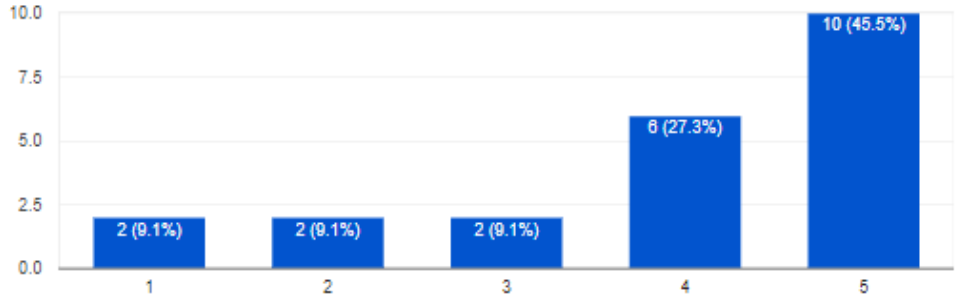
To the best of your knowledge, how difficult is it for your workers to find adequate housing (in Bath County or elsewhere)?

22 responses



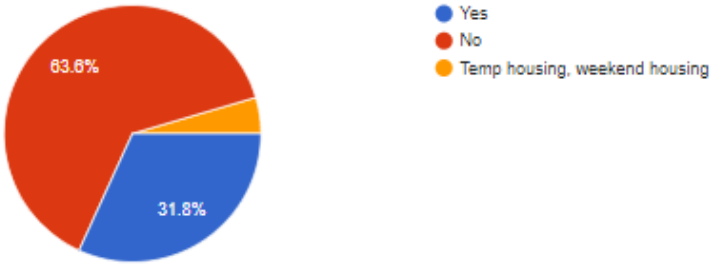
To the best of your knowledge, how difficult is it for your workers to find adequate housing specifically within Bath County?

22 responses



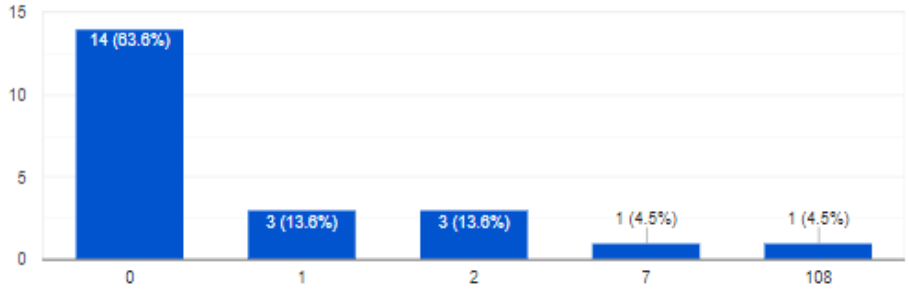
Do you provide housing for any of your employees, either for rent or as part of compensation?

22 responses



If you provide housing, how many housing units do you make available? If you do not provide housing, enter 0.

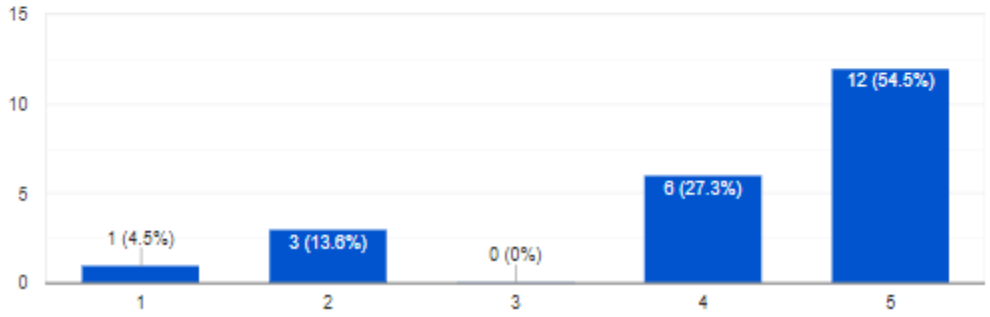
22 responses



For the next series of questions, indicate the degree to which you agree or disagree with each statement.

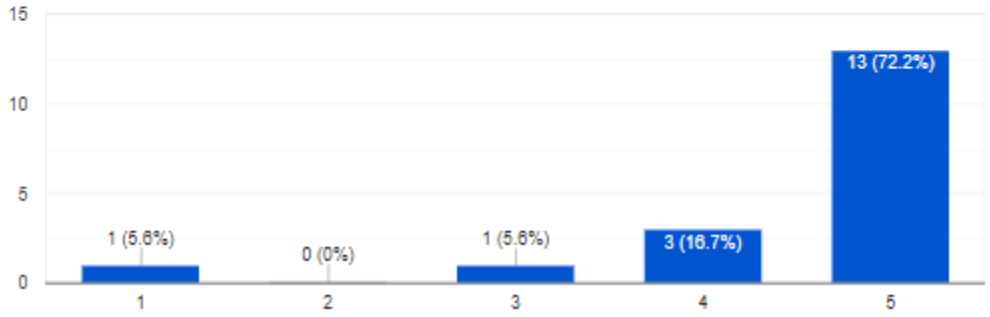
Finding adequate housing that is affordable is a major challenge for my employees.

22 responses



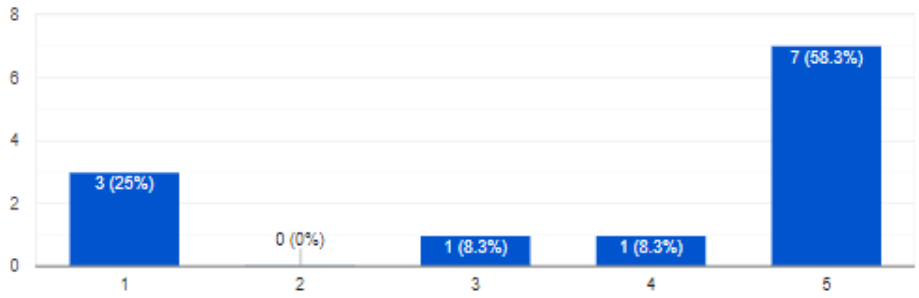
Finding adequate housing that is affordable is a major challenge for my YEAR-ROUND employees. Leave blank if your business does not employ year-round workers.

18 responses



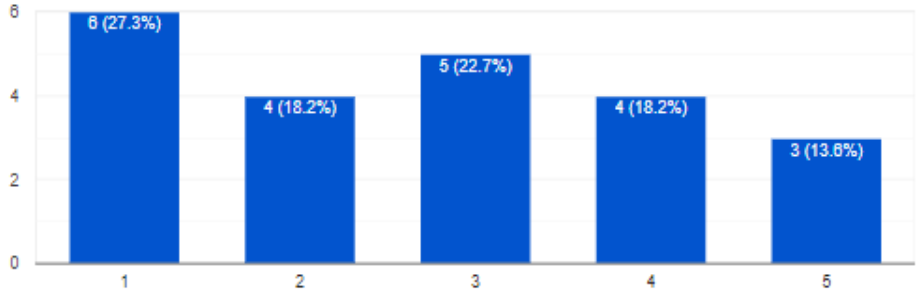
Finding adequate housing that is affordable is a major challenge for my SEASONAL employees. Leave blank if your business does not employ seasonal workers.

12 responses



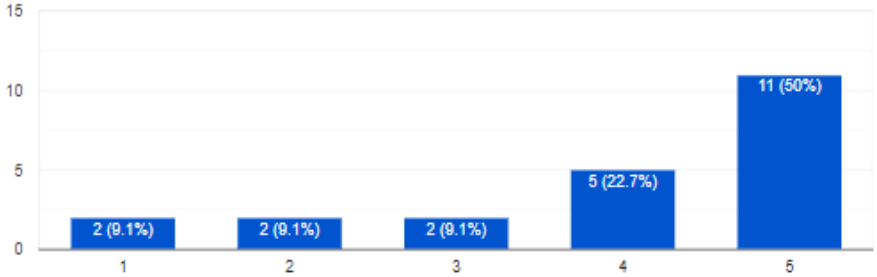
Access to transportation is a major challenge for my employees.

22 responses



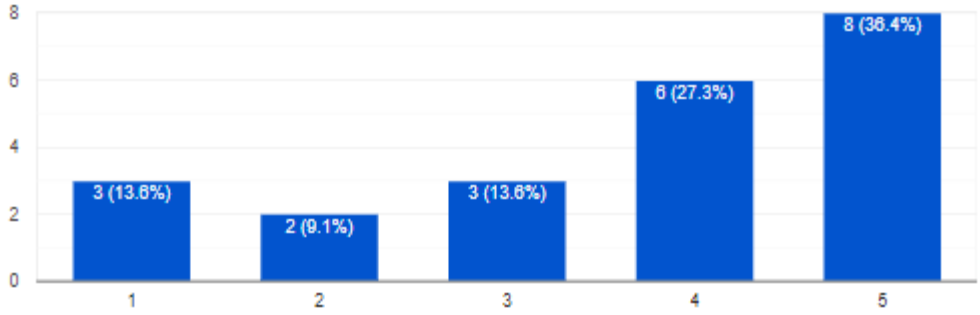
The lack of affordable housing options in Bath County negatively impacts recruitment for my business.

22 responses

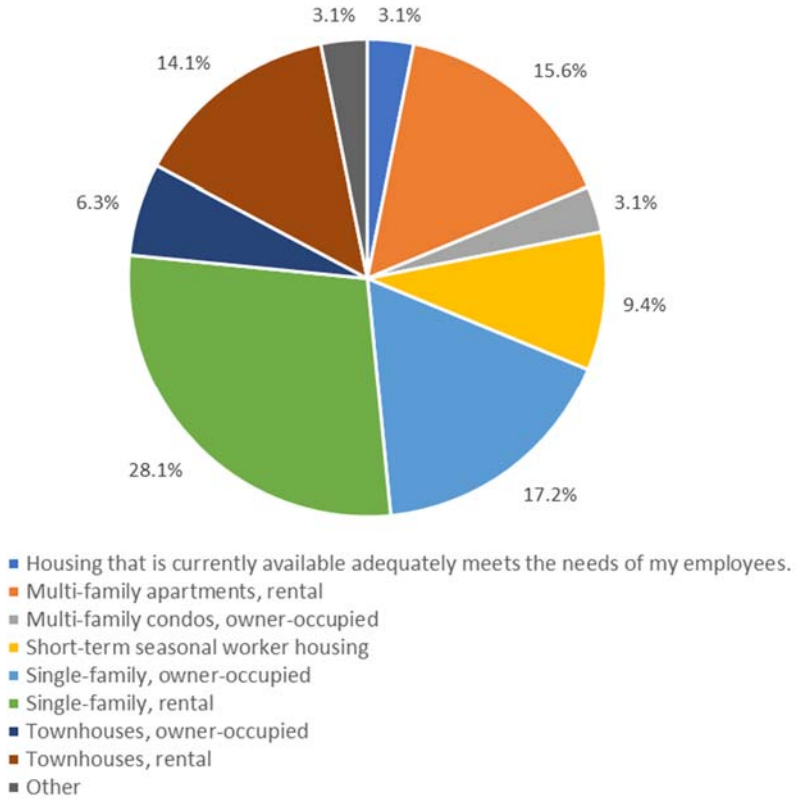


The lack of affordable housing options in Bath County negatively impacts my business.

22 responses



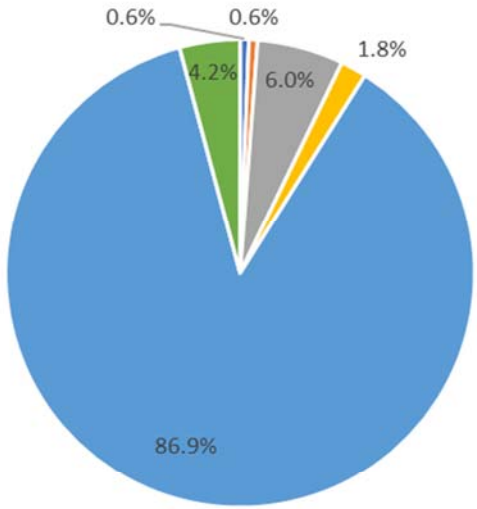
Select the types of housing that are needed in Bath County and/or surrounding communities to better accommodate your employees.



Housing Survey for Workers in Bath County

Do you work in Bath County?

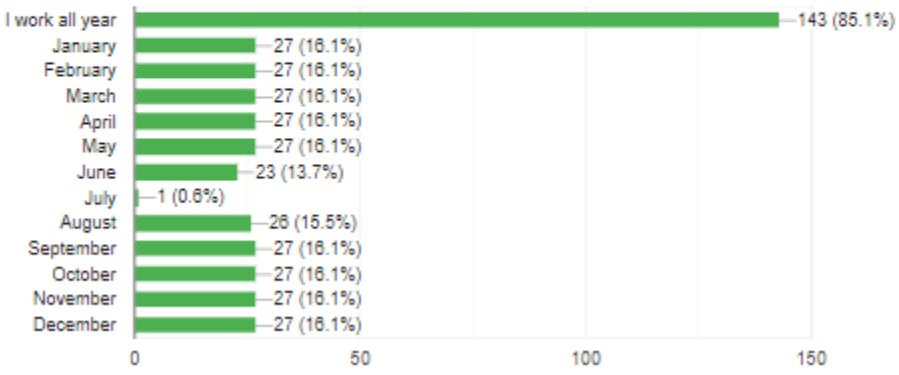
168 responses



- N/A - I don't work.
- No - I work out of the county.
- Yes - Full time between multiple employers
- Yes - Part time between multiple employers
- Yes - Full time with one employer
- Yes - Part time with one employer

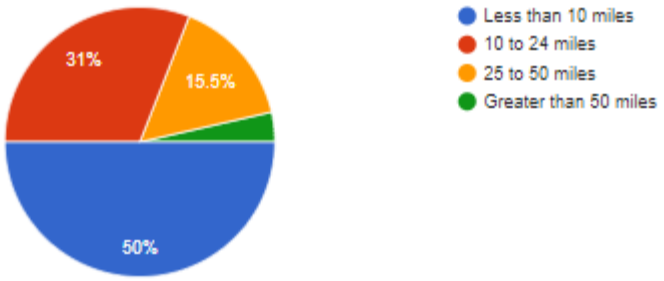
What months do you work?

168 responses



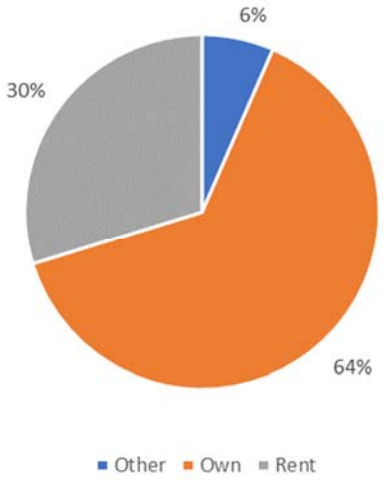
How long is your commute (one-way) to work?

168 responses



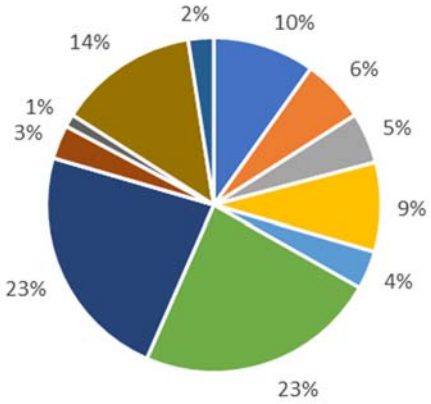
Do you currently rent or own your home?

168 responses



Why did you choose to live in Bath County? (Please select all that apply.)

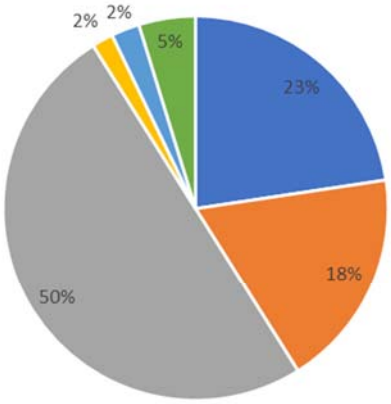
168 responses



- I do not live in Bath County - because I am happy where I am currently living
- I do not live in Bath County - because I could not find appropriate housing
- It was affordable
- The rural setting and/or amount of land
- There was available housing here
- This is where I'm from
- To be close to my job
- To be close to my partner/spouse's job
- To be close to school
- To be near friends, family, or partner
- Other

Select the establishment type that most closely describes where you work.

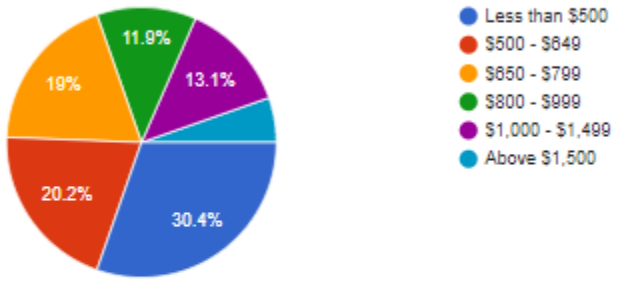
168 responses



- Education
- Healthcare or health services provider
- Hotel, bed and breakfast, or other accommodation
- Other tourism or recreation business
- Restaurant or bar
- Other

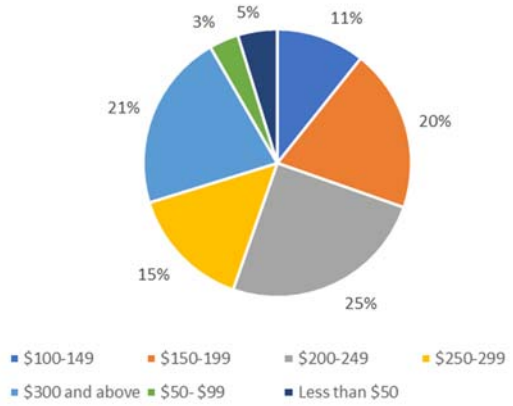
What is your current rent or mortgage (including taxes/insurance)?

168 responses



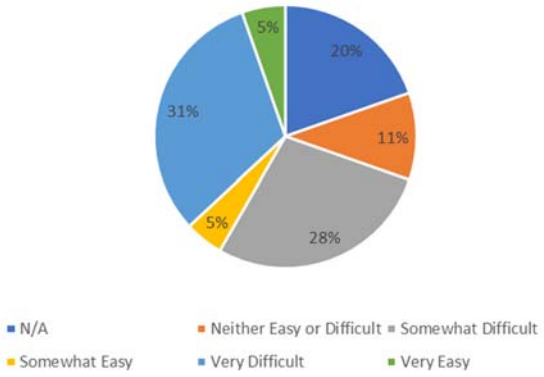
What do you pay monthly for utilities?

168 responses



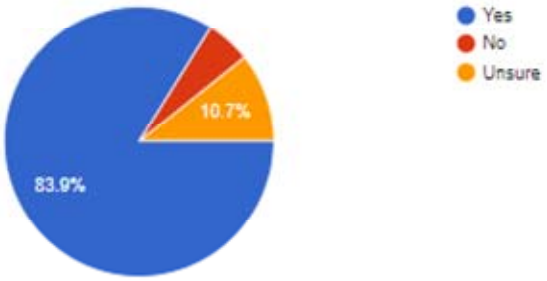
How easy or difficult was it to find adequate housing (in Bath County or elsewhere)?

168 responses



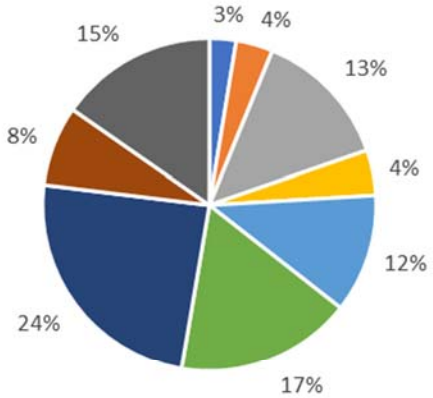
Do you feel there are a lack of housing options in Bath County?

168 responses



Select the types of housing that are needed in Bath County and/or surrounding communities to better accommodate employees.

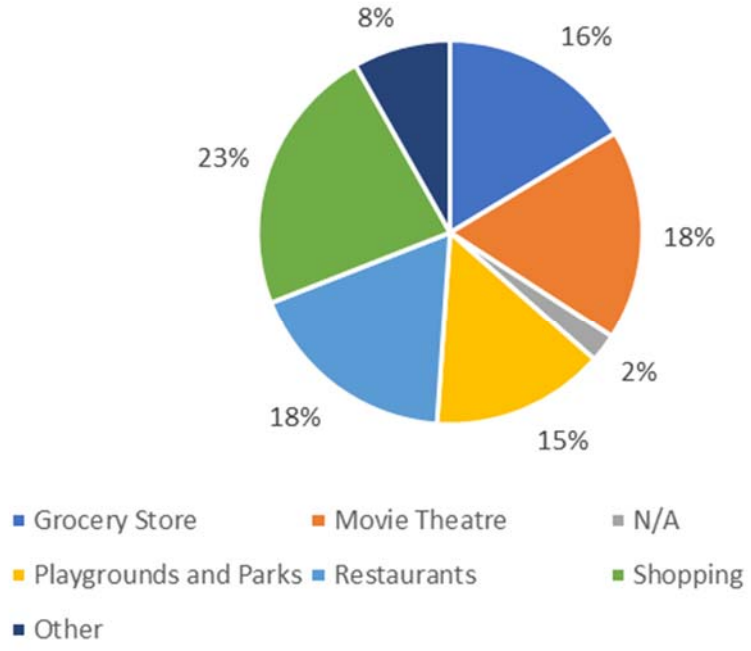
168 responses



- Other
- Housing that is currently available adequately meets the needs of employees.
- Multi-family apartments, rental
- Multi-family condos, owner-occupied
- Short-term seasonal worker housing
- Single-family, owner-occupied
- Single-family, rental
- Townhouses, owner-occupied
- Townhouses, rental

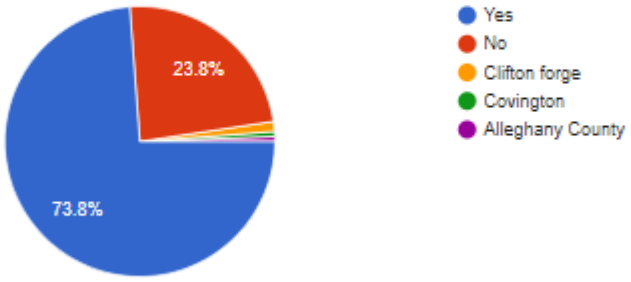
What amenities, services, and facilities do you feel are missing from Bath County?

168 responses



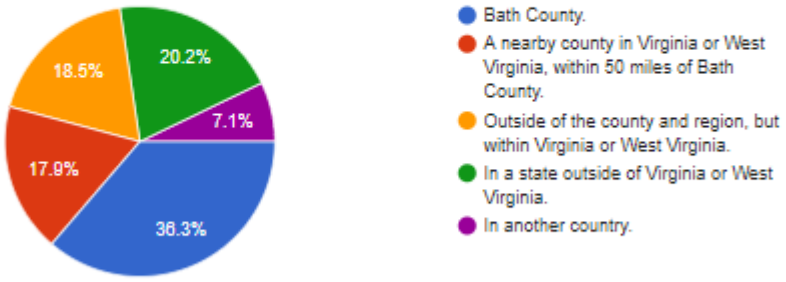
My primary residence is in Bath County

168 responses



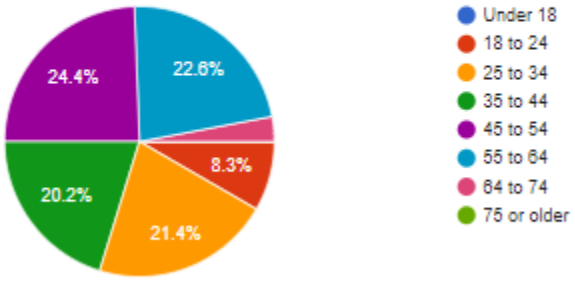
Where did you grow up?

168 responses



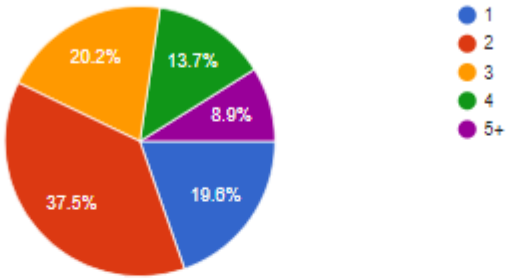
What is your age?

168 responses



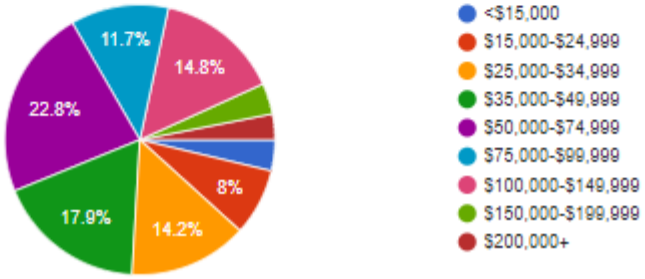
Including yourself, how many people are in your household? (A household is one housing unit.)

168 responses



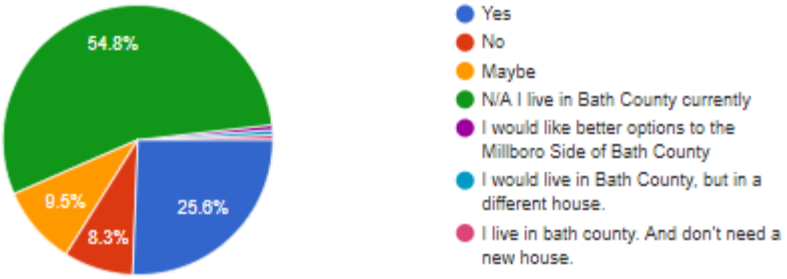
What is the annual income for your household, before taxes?

162 responses



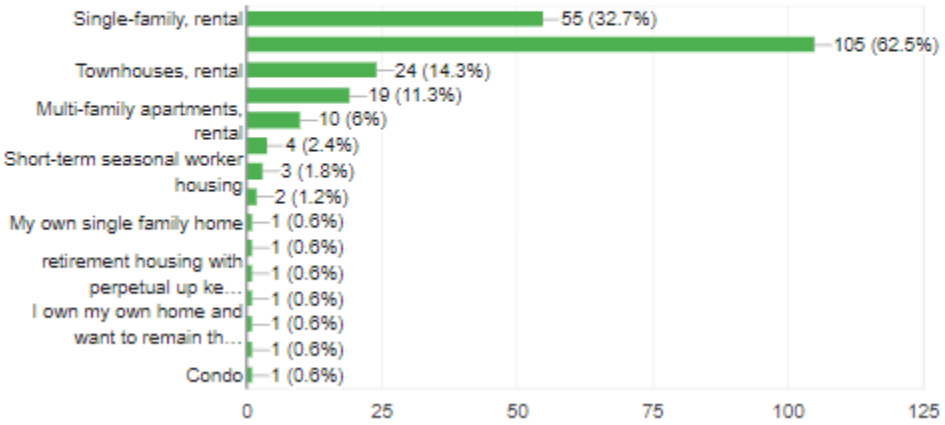
If appropriate housing were available, would you live in Bath County?

168 responses



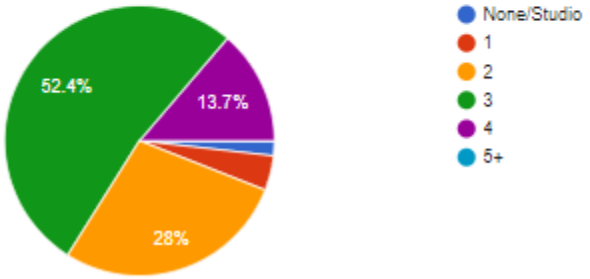
If you were to move, what would be your ideal type of home? (Please select all that apply.)

168 responses



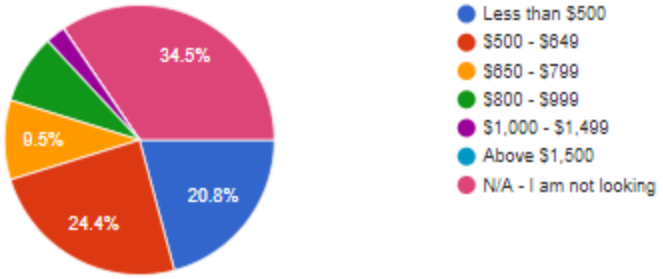
How many bedrooms would you need?

168 responses



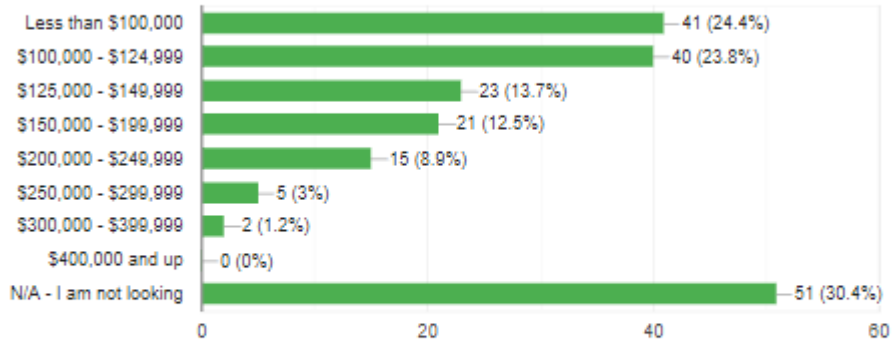
If looking to rent, what is your price range?

168 responses



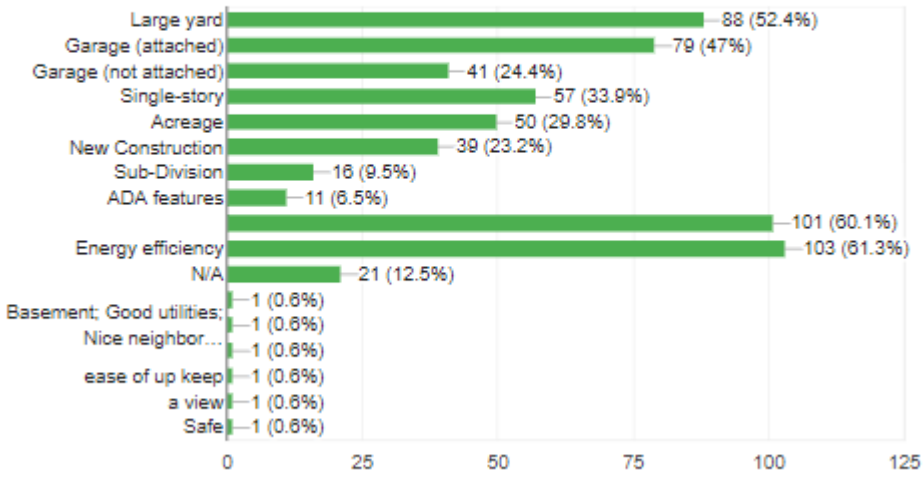
If looking to buy a home, what is your price range?

168 responses



In your desired home search, what additional features would you like to be included? (Please select all that apply.)

168 responses



APPENDIX C: DATA SOURCES

PROPRIETARY DATA SOURCES

ECONOMIC MODELING SPECIALISTS INTERNATIONAL (EMSI)

To analyze the industrial makeup of a study area, industry data organized by the North American Industrial Classification System (NAICS) is assessed. Camoin 310 subscribes to Economic Modeling Specialists Intl. (Emsi), a proprietary data provider that aggregates economic data from approximately 90 sources. Emsi industry data, in our experience, is more complete than most or perhaps all local data sources (for more information on Emsi, please see www.economicmodeling.com). This is because local data sources typically miss significant employment counts by industry because data on sole proprietorships and contractual employment (i.e. 1099 contractor positions) is not included and because certain employment counts are suppressed from BLS/BEA figures for confidentiality reasons when too few establishments exist within a single NAICS code.

ESRI BUSINESS ANALYST ONLINE (BAO)

Esri is the leading provider of location-driven market insights. It combines demographic, lifestyle, and spending data with map-based analytics to provide market intelligence for strategic decision-making. Esri uses proprietary statistical models and data from the US Census Bureau, the US Postal Service, and various other sources to present current conditions and project future trends. Esri data are used by developers to maximize their portfolio, retailers to understand growth opportunities, and by economic developers to attract business that fit their community. For more information, visit www.esri.com.

PUBLIC DATA SOURCES

AMERICAN COMMUNITY SURVEY (ACS), US CENSUS

The American Community Survey (ACS) is an ongoing statistical survey by the US Census Bureau that gathers demographic and socioeconomic information on age, sex, race, family and relationships, income and benefits, health insurance, education, veteran status, disabilities, commute patterns, and other topics. The survey is mandatory to fill out, but the survey is only sent to a small sample of the population on a rotating basis. The survey is crucial to major planning decisions, like vital services and infrastructure investments, made by municipalities and cities. The questions on the ACS are different than those asked on the decennial census and provide ongoing demographic updates of the nation down to the block group level. For more information on the ACS, visit http://www.census.gov/programs-surveys/acs/

ONTHEMAP, US CENSUS

OnTheMap is a tool developed through the US Census Longitudinal Employer-Household Dynamics (LEHD) program that helps to visualize Local Employment Dynamics (LED) data about where workers are employed and where they live. There are also visual mapping capabilities for data on age, earnings, industry distributions, race, ethnicity, educational attainment, and sex. The OnTheMap tool can be found here, along with links to documentation: http://onthemap.ces.census.gov/.

Leading action to grow your economy

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