



WAYNE COUNTY, OHIO HOUSING NEEDS ANALYSIS

Summer 2024

Prepared by:



Next Move Group
We Are Jobs

Prepared for:



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Executive Summary

Wayne County, Ohio, has a substantial industrial base which creates well-paying jobs for the county, but a unique threat currently facing industries is the ability to recruit skilled employees as 3,234 houses (2,443 for sale and 791 for rent) need to be built or renovated over the next 5 years to keep pace with housing demand.

More than 22,000 people currently drive to Wayne County each day to work from outside the county, yet residential land use within the county has actually decreased by roughly 1,700 acres since 2016. Stakeholders indicated houses are currently selling in 19 days in the county with contracts going for above asking price. Additionally, cost-burdened analysis shows that Wayne County households are less cost-burdened in comparison to Ohio and National averages. This suggests that housing affordability is not a major factor deterring people who work in Wayne County from living there. Instead, the issue seems to be a shortage of available homes. These well-paying jobs present a unique opportunity for residential developers to make desired returns on investment should they choose to build in Wayne County, and such residential development is needed to sustain the impressive list of companies in the county. Employees of Wayne County industries who work in Wayne County yet live elsewhere were surveyed. 12.5% of those surveyed said they intend to purchase a home within the next 2 years. Consider these facts:

- Wayne County needs the following new homes for sale within the next 5 years to keep up with projected housing demands to support the workforce:
 - 140 new or renovated homes for sale priced between \$150,000-\$200,000
 - (Across America developers are generally reluctant to build homes for sale at prices below \$200,000. As a result, we recommend addressing this demand by focusing on renovating existing dilapidated properties)
 - 1,372 new homes priced between \$200,000-\$350,000
 - 802 new homes priced between \$350,000-\$500,000
 - 129 new homes price above \$500,000
 - 2,443 total new homes for sale within the next 5 years

- Wayne County needs the following new units for rent within the next 5 years to keep up with projected housing demands to support the workforce:
 - 35 new or renovated units for rent priced between \$750-\$1,000/monthly
 - (We recommend addressing this demand by focusing on renovating existing dilapidated properties)
 - 461 new units for rent priced between \$1,000-\$1,250/monthly
 - 269 new units for rent priced between \$1,250-\$1,500/monthly
 - 26 new units for rent priced above \$1,500/monthly+
 - 791 total new rental units within the next 5 years

Wayne County residents can afford higher-priced houses than they currently occupy. Wayne County's "cost-burdened" owner ratio is 18.40% compared to the 20.60% Ohio average and 27.90% USA average. Additionally, Wayne County's "cost-burdened" renter ratio is 42.20% compared to 46.80% Ohio average and 51.90% USA average.

A unique threat to the agricultural community in Wayne County is a lack of housing. Farm labor has grown 26.42% in Wayne County since 2020 compared to 8.8% in Ohio and 6.8% in the USA. Despite Wayne County seeing this 26.42% increase in farm labor, new house listings have dropped by 4.5% since 2019 and as of August 10, 2024, only 51 units are available for rent in Wayne County on Zillow. If land is not repurposed for residential, this threat could cause harm to a farmer's ability to attract labor.

In order to spur housing development Wayne County should:

- Use more land for residential uses:
 - Wayne County's ordinances allow 1 house per acre if public wastewater is not available and 1 house per .25 acre if public wastewater is available.
 - Option A- Make an additional 175 acres per year available for residential development where public wastewater is available. (Potential residents surveyed desire larger lot sizes than .25 acres. Thus, we recommend 175 acres rather than 125 acres.)
 - Option B- Make an additional 500 acres per year available for residential development where public wastewater is not available.
 - Option C- Run public wastewater infrastructure to an additional 175 acres per year where it is currently not available and can be used for residential.

- 140 homes are needed for sale below \$200,000. In most parts of America, developers are not building houses that sell for below \$200,000. 35 homes are needed for rent between \$750-\$1,000.
 - In order to supply the needs for this gap, Wayne County and its municipalities need to spur the redevelopment of obsolete or derelict units.
 - 1,336 housing units within Wayne County are expected to be obsolete or derelict. Wayne County should work to use its authority to condemn those properties that have multiple code violations and spur redevelopment.
 - Out of the 1,336 derelict units, only 140 are needed to be renovated to meet this need (approximately 10%). 35 additional units need to be renovated to be leased for \$750-\$1,000/month.

- New housing developments are currently being built within Wayne County. The county itself and its municipalities should support those developments if possible. Additionally, Wayne County should create a digital marketing and paid social media campaign to housing developers promoting these key points:
 - 2,443 houses are needed to be built within the next 5 years to keep up with household income projections
 - 791 rental units are needed to be built between \$750-\$1,500/month within the next 5 years to keep up with household income projections
 - Economic data shows Wayne County has a cluster of well-paying manufacturing jobs to support houses priced at more than \$200,000 with more than 22,000 people driving into the county daily to work from outside the county
 - Wayne County has used TIF incentives to support multiple housing developers
 - Wayne County has fast permitting turnarounds
 - And, Wayne County is planning to add to its residential land use inventory

- Use AI software to make permitting easier than it already is.

- Continue the use of TIF incentives and CRAs to remain aggressive in attracting residential developers.



Chapter 1:

Projected Housing Demand

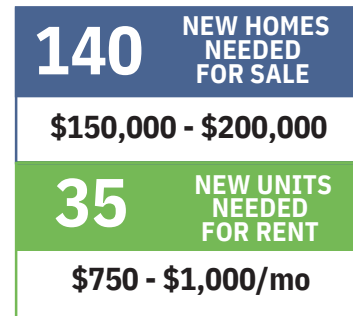


Our Recommendations

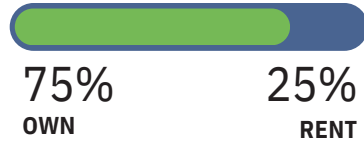
For New Housing Needed Over the Next 5 Years

140 new homes priced \$150,000 to \$200,000 for sale are needed in Wayne County, Ohio within the next 5 years. 35 additional rental units priced \$750 to \$1,000 monthly are needed within the next 5 years.

- According to economic research, economic projections indicate Wayne County's average household income bracket of \$75,000 to \$100,000 will grow by 202 households over the next five years.
- Wayne County residents own homes 75% of the time and rent 25% of the time.
- In Wayne County, the average household spends \$1,006.12 monthly on car notes, credit card payments, and student loan payments, which affects the amount of mortgage for which households can qualify.
- At the time of this study, 30-year mortgage rates with an 8% down payment (2023 National Association of Realtors average down payment release) are 6.8%.
- Based on the math above, this household income demographic can afford the mortgage on a home priced \$150,000 to \$200,000. While a household income demographic may have the ability to purchase a more expensive home, a conservative estimate was chosen for this study.
- This household income demographic typically can afford an apartment which averages \$750 to \$1,000 monthly in Wayne County.
- 12 homes are currently on the market for sale in Wayne County priced \$150,000 to \$200,000.
- Therefore, we estimate the market demands 140 homes priced \$150,000 to \$200,000 within the next 5 years.
- 15 units are currently on the market for rent in Wayne County priced \$750 to \$1,000 monthly at the time of this study.
- Therefore, we estimate the market demands 35 new rental units priced \$750 to \$1,000 monthly within the next 5 years.



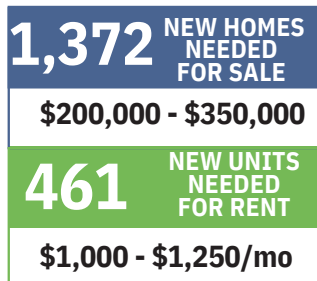
Average households in Wayne County, Ohio



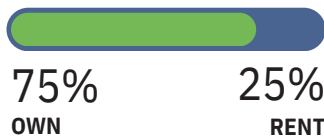
*Most developers are generally reluctant to build homes for sale at prices below \$200,000.

As a result, we recommend addressing this demand by focusing on renovating existing, dilapidated properties.

1,372 new homes priced \$200,000 to \$350,000 for sale are needed in Wayne County, Ohio within the next 5 years. 461 additional rental units priced \$1,000 to \$1,250 monthly are needed within the next 5 years.



Average households in Wayne County, Ohio



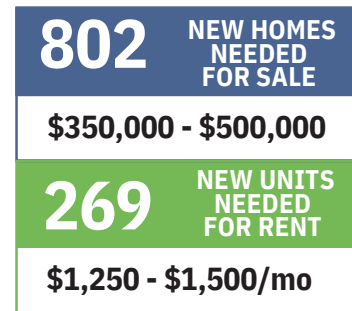
- According to economic research, economic projections indicate Wayne County's average household income bracket of \$100,000 to \$150,000 will grow by 1,886 households over the next five years.
- Wayne County residents own homes 75% of the time and rent 25% of the time.
- In Wayne County, the average household spends \$1,006.12 monthly on car notes, credit card payments, and student loan payments, which affects the amount of mortgage for which households can qualify.
- At the time of this study, 30-year mortgage rates with an 8% down payment (2023 National Association of Realtors average down payment release) are 6.8%.
- Based on the math above, this household income demographic can afford the mortgage on a home priced \$200,000 to \$350,000. While a household income demographic may have the ability to purchase a more expensive home, a conservative estimate was chosen for this study.
- This household income demographic typically can afford an apartment which averages \$1,000 to \$1,250 monthly in Wayne County.
- 43 homes are currently on the market for sale in Wayne County priced \$200,000 to \$350,000.
- Therefore, we estimate the market demands 1,372 homes priced \$200,000 to \$350,000 within the next 5 years.
- 10 units are currently on the market for rent in Wayne County priced \$1,000 to \$1,250 monthly at the time of this study.
- Therefore, we estimate the market demands 461 new rental units priced \$1,000 to \$1,250 monthly within the next 5 years.

Our Recommendations

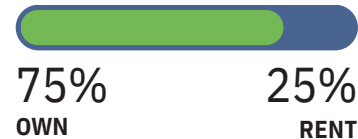
For New Housing Needed Over the Next 5 Years

802 new homes priced \$350,000 to \$500,000 for sale are needed in Wayne County, Ohio within the next 5 years. 269 additional rental units priced \$1,250 to \$1,500 monthly are needed within the next 5 years.

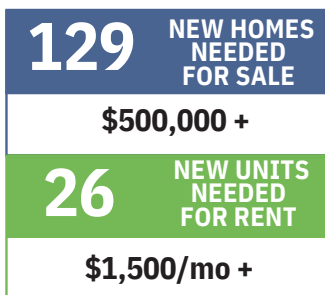
- According to economic research, economic projections indicate Wayne County’s average household income bracket of \$150,000 to \$200,000 will grow by 1,105 households over the next five years.
- Wayne County residents own homes 75% of the time and rent 25% of the time.
- In Wayne County, the average household spends \$1,006.12 monthly on car notes, credit card payments, and student loan payments, which affects the amount of mortgage for which households can qualify.
- At the time of this study, 30-year mortgage rates with an 8% down payment (2023 National Association of Realtors average down payment release) are 6.8%.
- Based on the math above, this household income demographic can afford the mortgage on a home priced \$350,000 to \$500,000. While a household income demographic may have the ability to purchase a more expensive home, a conservative estimate was chosen for this study.
- This household income demographic typically can afford an apartment which averages \$1,250 to \$1,500 monthly in Wayne County.
- 27 homes are currently on the market for sale in Wayne County priced \$350,000 to \$500,000.
- Therefore, we estimate the market demands 802 homes priced \$350,000 to \$500,000 within the next 5 years.
- 11 units are currently on the market for rent in Wayne County priced \$1,250 to \$1,500 monthly at the time of this study.
- Therefore, we estimate the market demands 269 new rental units priced \$1,250 to \$1,500 monthly within the next 5 years.



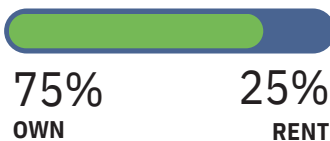
Average households in
Wayne County, Ohio



129 new homes priced above \$500,000 for sale are needed in Wayne County, Ohio within the next 5 years. 26 additional rental units priced above \$1,500 monthly are needed within the next 5 years.



Average households in
Wayne County, Ohio

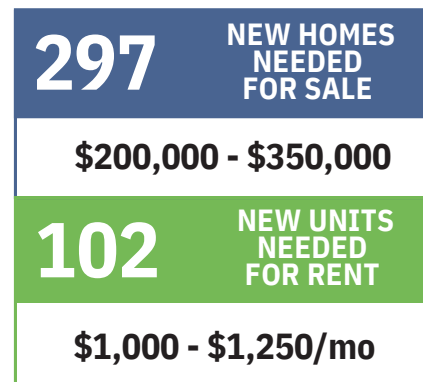
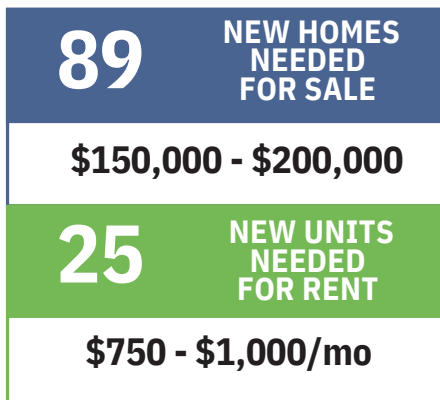


- According to economic research, economic projections indicate Wayne County’s average household income bracket above \$200,000 will grow by 185 households over the next five years.
- Wayne County residents own homes 75% of the time and rent 25% of the time.
- In Wayne County, the average household spends \$1,006.12 monthly on car notes, credit card payments, and student loan payments, which affects the amount of mortgage for which households can qualify.
- At the time of this study, 30-year mortgage rates with an 8% down payment (2023 National Association of Realtors average down payment release) are 6.8%.
- Based on the math above, this household income demographic can afford the mortgage on a home priced above \$500,000. While a household income demographic may have the ability to purchase a more expensive home, a conservative estimate was chosen for this study.
- This household income demographic typically can afford an apartment which averages above \$1,500 monthly in Wayne County.
- 10 homes are currently on the market for sale in Wayne County priced above \$500,000.
- Therefore, we estimate the market demands 129 homes priced above \$500,000 within the next 5 years.
- 20 units are currently on the market for rent in Wayne County priced above \$1,500 monthly at the time of this study.
- Therefore, we estimate the market demands 26 new rental units priced above \$1,500 monthly within the next 5 years.

The figures in this section are not inclusive of units permitted in 2024.

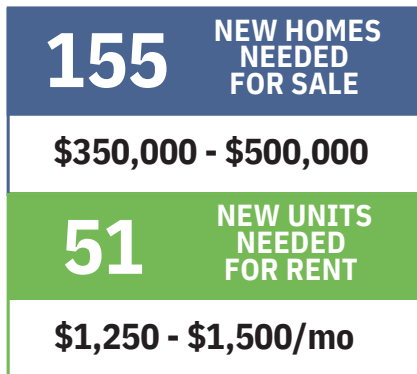


THESE ARE 5 YEAR PROJECTIONS



*Most developers are generally reluctant to build homes for sale at prices below \$200,000.

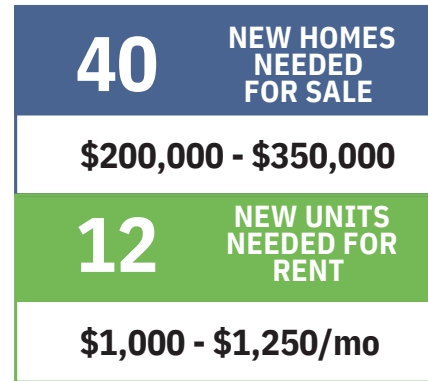
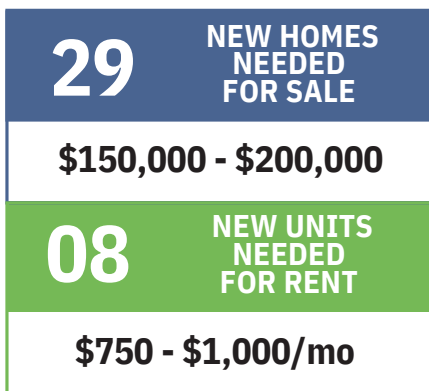
As a result, we recommend addressing this demand by focusing on renovating existing, derelict properties.



The figures in this section are not inclusive of units permitted in 2024.

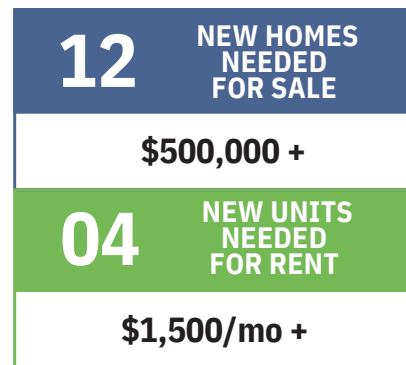
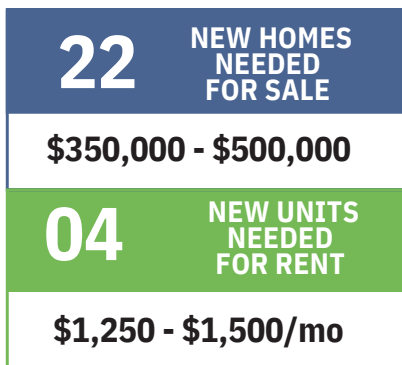


THESE ARE 5 YEAR PROJECTIONS



*Most developers are generally reluctant to build homes for sale at prices below \$200,000.

As a result, we recommend addressing this demand by focusing on renovating existing, derelict properties.



Our Approach For *Projected Housing Demand*

Assumptions made for these Recommendations:

- State: Ohio
- Loan Term: 30-year, fixed
- Interest Rate: 6.8%
- Monthly Debt: Wayne County \$1,006.12, Wooster \$952.95, Orrville \$1092.49
- Down Payment: 8%
- Payment Being No More Than 35% of Monthly Gross Income

Sources Used for these Recommendations:

- ESRI, ArcGIS
- American Community Survey
- U.S. Census Bureau
- Wells Fargo Mortgage Calculator
- Bankrate.com
- National Association of Realtors
- Zillow, Redfin, Apartments.com, MLS Matrix, Realtor.com, Rentalrealstate.com



Chapter 2:

Recommended Strategies With Implementation Examples From Across America



1. Land Use

Wayne County, Ohio, **should find ways to transition land to residential use if the county is to spur enough housing to meet housing demand for the workforce.**

Within the past 8 years, roughly 4% of agricultural land has been repurposed to commercial. Had this same amount of land been repurposed to residential, Wayne County would likely be spurring the housing needed.

Over the next five years, 175 acres per year along public wastewater or 500 acres per year not along public wastewater within Wayne County needs to be transitioned to residential use to support the minimum number of houses recommended that need to be built. Over 5 years, this is less than 1% of the total agricultural land within Wayne County, which needs to be transitioned to residential to meet this need. Surveys show that those driving to Wayne County to work prefer larger lots and larger yards which is why we recommend 175 acres along public wastewater rather than 125 acres, which would be the minimum zoning requirement.

(Note, this number could decrease if Wayne County rehabs derelict properties as recommended in Recommendation 2).

OVER THE
NEXT 5 YEARS

175
ACRES

per year needs to be transitioned to residential use if on public wastewater, 500 acres per year if not on public wastewater.

790+
NEW RENTAL UNITS

will be needed.

2400+
NEW HOMES FOR SALE

will be needed.

Other Towns' Strategies

This is an example of how Delaware, Ohio, is adding to it's residential inventory.

This is an example of a project in Linn County, Iowa, creating residential acreage out of a farm by creating an agri-community.



2. Derelict Property Rehab



1,336 housing units within Wayne County are expected to be obsolete, substandard, or derelict. 35 of these homes per year need to be renovated over the next 5 years for Wayne County to keep up with the demand of homes needed for sale below \$200,000 and for rent below \$1,000 per month.



Furthermore, **a threat to the agricultural community is not having enough homes for farm workers**, these units with investment could also become available for farm workers thus reducing this threat to an important segment of the Wayne County economy.

Many communities nationwide **use municipal authority to seize or force the sale of properties** which have had multiple code violations, then offer those properties for low prices (in some instances \$1) to new owners interested in rehabilitating the property. A few examples are below:



City Eyes First Listings Through Homeownership Program

In May 2021, a host of Jamestown officials gathered in front of a Catlin Avenue property in desperate need of some TLC to announce the rollout of a new housing strategy. Boiled down, the city would commence a...

Post Journal / Mar 1

Jamestown Identifies 45 Zombie Owners & 200 Properties Not Being Maintained, Pursues Legal Action After 1 Code Violation And 1 year Of Unpaid Taxes



Baltimore City selling properties for \$1 to address vacant home crisis

Applicants need to provide proof they have at least \$90,000 available to spend on rehabbing the home. Affordable housing advocates have concerns about the program.

WMAR 2 News Baltimore / Mar 23

Baltimore Selling Dilapidated Homes To Developers For \$3,000; Nonprofits for \$1,000; Or Individuals For \$1.

Youngstown, Ohio, has **implemented a blight tax** to help combat out of town property owners.

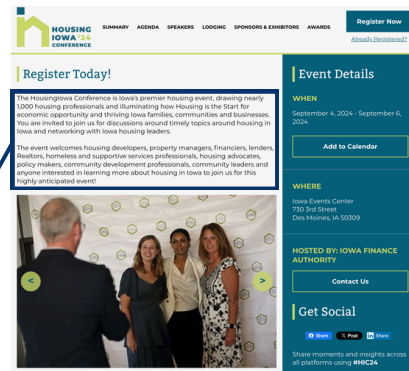
Consider starting up a non-profit, or work with the existing community foundation, to **establish a fund specifically for the revitalization** of locally owned, derelict housing, like Durham, North Carolina.

3. Marketing

Wayne County has 22,039 people driving to Wayne County, Ohio, to work daily from outside the county. Additionally, Wayne County's "cost-burdened" housing costs are far less than the Ohio and USA average. These two key facts combined mean developers can most likely achieve desired returns on investment for housing developments in Wayne County. Therefore, it is recommended that Wayne County **create an aggressive digital marketing and paid social media campaign to housing developers**, pointing them to a landing page promoting the following key points:

- 3,234 houses (2,443 for sale and 791 for rent) are needed within the next 5 years in Wayne County, Ohio, to keep pace with demand.
- 22,039 people drive to Wayne County to work who don't live in the county.
- There is a cluster of well-paying jobs within Wayne County that could support homes being built and priced high enough for developers to achieve desired returns on investment.
- Wayne County and its municipalities have multiple success stories of using CRA and TIF incentives to spur residential development.
- Wayne County and its municipalities have professionals to walk developers through the permitting process.
- Wayne County and its municipalities are making land available for potential housing developers.

- Iowa as a state is very aggressive in attracting and incentivizing housing developers, **here is an example** of an annual conference they have each year to market to developers:



The HousingIowa Conference is Iowa's premier housing event, drawing nearly 1,000 housing professionals and illuminating how Housing is the Start for economic opportunity and thriving Iowa families, communities and businesses. You are invited to join us for discussions around timely topics around housing in Iowa and networking with Iowa housing leaders.

The event welcomes housing developers, property managers, financiers, lenders, Realtors, homeless and supportive services professionals, housing advocates, policy makers, community development professionals, community leaders and anyone interested in learning more about housing in Iowa to join us for this highly anticipated event!

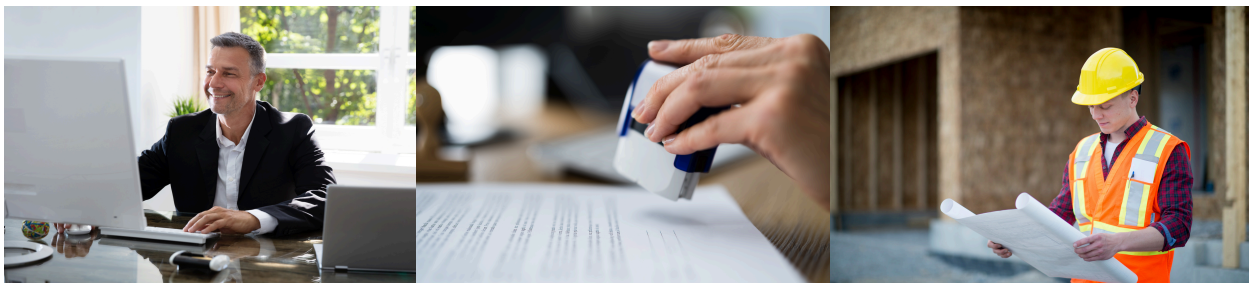
- **Here is an example** of South Euclid, Ohio, using social media marketing to market to developers:



4. Permitting

Wayne County, and the municipalities within it, should consider using AI software to make the permitting process as perceived by developers to be more efficient. www.camino.ai or a similar alternative should be considered. Wooster already has online permitting systems; the other municipalities within Wayne County should consider the following:

- In Ohio, small towns like Perry Township and Mansfield have started to **incorporate technology, including AI, to streamline their building permitting processes**, which can encourage development by reducing the time and complexity involved in getting permits approved.
- Perry Township, Ohio, for example, has **implemented an online permitting system** through SmartGov that significantly improved their ease of use by streamlining daily tasks and providing quick access to necessary permits or cases. Additionally, the solution has improved workflows, enabling faster permit processing, online applications, and future scalability for more complex cases.
- Similarly, Mansfield has also made strides in modernizing its permitting processes by **offering online applications and electronic plan approvals**. These efforts are part of a broader initiative to enhance the city's infrastructure and attract new development by reducing barriers to construction and renovation.



5. Incentives

Proactive incentives such as Tax Increment Financing (TIF) districts and Community Reinvestment Areas (CRAs) have been used in Wayne County and its municipalities to spur housing developments. Wayne County and its municipalities should continue using those tools and if anything be more aggressive with them than ever. Here are some below examples of aggressively using incentives to spur residential development:

Example of Union County, Ohio's, TIF district to develop 750 acres.

Officials from Union County and fast-growing Jerome Township signed an agreement Wednesday that opens up 750 acres for development.

It also creates a new four-member board that oversee how tax revenues that development creates will be spent for new roads and other infrastructure.

The agreement comes after months of negotiations between the township and county.

County and township officials clashed over how Jerome Township was using money from tax incentives for roads and other improvements.

Union County officials claimed the money benefited developers more than the community at large.

The agreement includes not only the county and township, but also the Schottenstein Real Estate Group.

Under the agreement, Houchard Road will be extended, and that will open up 750 acres in the southern part of the township for development. The land is in the Jerome Township Innovation District.

The agreement also calls for the creation of the Jerome Township-Union County Cooperative Board, with two members each from the township and county.

They will identify infrastructure projects and how tax-increment financing will be used to fund them. Tax-increment financing is when tax money that development generates is diverted to fund roads, sewers and similar improvements.

Example of Hilliard, Ohio's, City Council creating TIF district for \$375 million mixed use development

Council also approved a developer's agreement with McCabe's Dublin-Cosgray LLC that stipulates what infrastructure improvements would be the responsibility of the developer, establishes a tax-increment-financing district and outlines other agreements.

A TIF is an economic-development mechanism available to local governments to finance public-infrastructure improvements, according to the Ohio Development Services Agency. A TIF locks in the taxable worth of real property at the value it holds at the time the authorizing legislation is approved, diverting the incremental revenue from traditional property-tax-collecting entities to designated uses, such as funding the necessary improvements or infrastructure to support a new development.

Example of Cleveland, Ohio's, property tax abatement program for new residential construction.

NEW CONSTRUCTION

Until December 31, 2023, residential tax abatement is offered at a rate of **100%** for **15 years** on all new construction residential property in the City of Cleveland. **New construction must meet the Cleveland Green Building Standard** in order to be eligible for tax abatement. Taxes on a newly constructed home are abated. The owner is liable for all taxes associated with the after improved value of the land only. During the term of the abatement, the land taxes may change due to changes in the tax rate and/or changes in assessed value of the land.

NOTE: the recommendations in this section by and large do not cost the county cash outlays upfront (with the exception of the marketing effort which costs less than \$100,000). The recommendations should create a positive ROI by virtue of new property tax collections.

In the event after one year, the above recommendations are unsuccessful (barring an economic recession or interest rate spike which would make most any recommendation not successful) the County then should consider buying agricultural land, running infrastructure including wastewater to the land, and then solicit proposals from developers via an RFP process where the county chooses the development it desires.

Based on the amount of well-paying jobs, people traveling to Wayne County to work, and the low cost-burden homes currently are costing Wayne Countians, a very positive return on investment should be available in Wayne County for developers, so soliciting developers to compete to build homes in Wayne County should work if the County has run infrastructure to land it has bought. But, **we believe the County can likely have success without spending this money.**

As seen below, Wayne County and its municipalities offer aggressive CRA incentives for residential developers. Wayne County and its municipalities should continue to aggressively promote these programs to residential developers.

Location	Commercial			Residential		
	Abatement Percentage	Duration (years)	Minimum Investment	Abatement Percentage	Duration (years)	Minimum Investment
Dalton	Up to 100%	15 years	\$5,000	-	-	-
Doylestown	Up to 100%	15 years	\$5,000	100%	15 years	\$2,500
Orrville	Up to 100%	15 years	Case by Case	50% (existing) No new construction	10 years	\$2,500
Rittman	100%	15 years	\$5,000	100% (new)	15 years	\$2,500
Shreve	Up to 100%	15 years	5,000	50%	10 years	2,500
Smithville	Up to 100%	15 years	5,000	50% 50%	10 years 10 years	2,500 – 5,000 remodel 5,000 new construction
Wooster	Up to 100%	12 years (existing) 15 years (new)	Case by Case	100%	10 years (existing) 12 years (new)	\$2,500



Chapter 3:

Stakeholder Engagement Summary



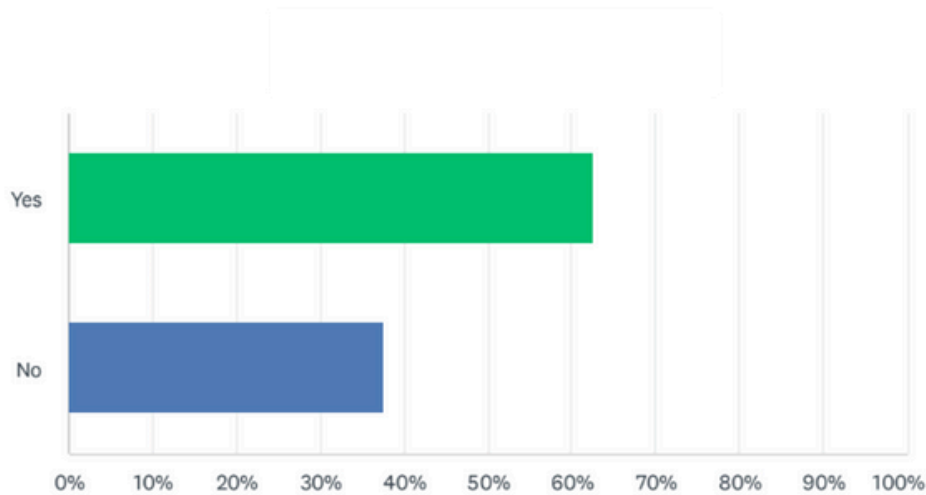
Below is a summary of what stakeholders expressed to Next Move Group's consultants during in-person meetings that took place in October, 2023:

- The county's goal is to grow residential in towns and villages that can meet the needs of residents without sacrificing valuable farmland.
- The comment mentioned in every stakeholder meeting was the need for attainable, entry-level housing in the range of \$150,000 to \$180,000 purchase price.
- Younger professionals tend to want rental property vs. owning a home in the community.
- Derelict properties owned by out-of-town individuals and companies are preventing redevelopment.
- The arts district could be an attractive place for multi-family/condos and new housing.
- Limited zoning or code restrictions in the county but have discussed establishing them.
- Very few three-bedroom units are available for rent around the county.
- Production workers at most can afford \$800 - \$900/month in rent or mortgage payments.
- Developers should be encouraged to build more multi-family options rather than just single-family homes, or the community must work together to find developers that will build them.
- Nice rental properties are needed to attract new residents, but new housing is needed to get them to stay.
- Wooster has used TIF's and other incentives to encourage development with multiple new housing opportunities underway or planned.
- NIMBY (not in my backyard) has prevented some new housing development in Wooster, even nice ones in the community.

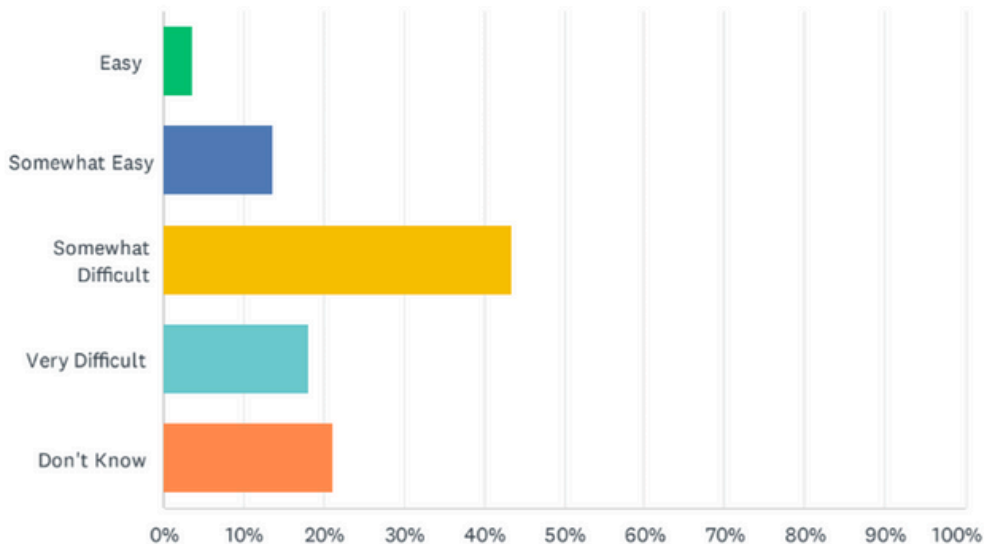
- Rehab and redevelopment near downtown Wooster is needed, should possibly create incentives to encourage this.
- Ohio State campus needs housing for grad students, doctoral students, research fellows and new faculty.
- Wooster Residential Traditional District/Zone is too restrictive. Does not allow for multi-family. The area surrounding downtown Wooster is zoned single-family residential and needs to be reassessed because of the existing large homes and lack of multi-family near downtown.
- Codes on Utilities, Curbs, and Gutters are over-engineered, adding major additional costs to residential development projects.
- Community Action Council could be owner/operator of Low-Middle Income housing.
- There should be a community foundation created to fix up derelict housing.
- City of Wooster officials stated that developers tell them there is not enough capacity amongst existing developers to meet construction demand.
- County officials mentioned Apple Creek School as a redevelopment opportunity.
- Lemon Development was not offered CRA & TIF for a planned project that would've created moderately priced homes. Tried several times to get, shifted focus to projects in communities being more aggressive with developers.
- Several villages have old school buildings that will soon be available for development opportunities.
- City of Wooster can approve plans within 2 days with expedited permitting process.

Results from surveying employees who work in Wayne County, Ohio

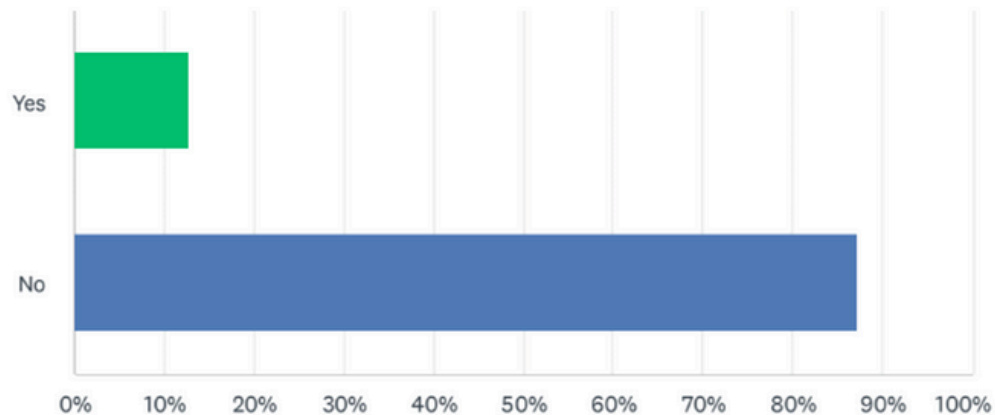
Q2 Would you consider moving to Wayne County if affordable housing was available?



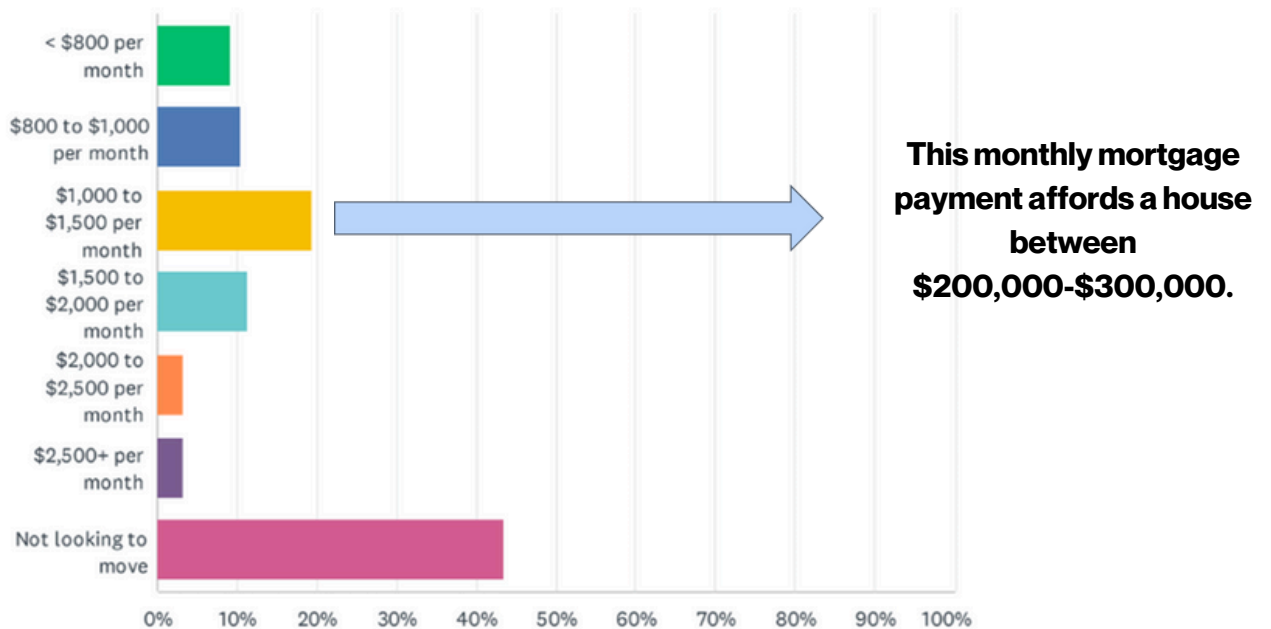
Q4 How would you describe the ability to secure any type of housing (rental or single-family) in Wayne County today?



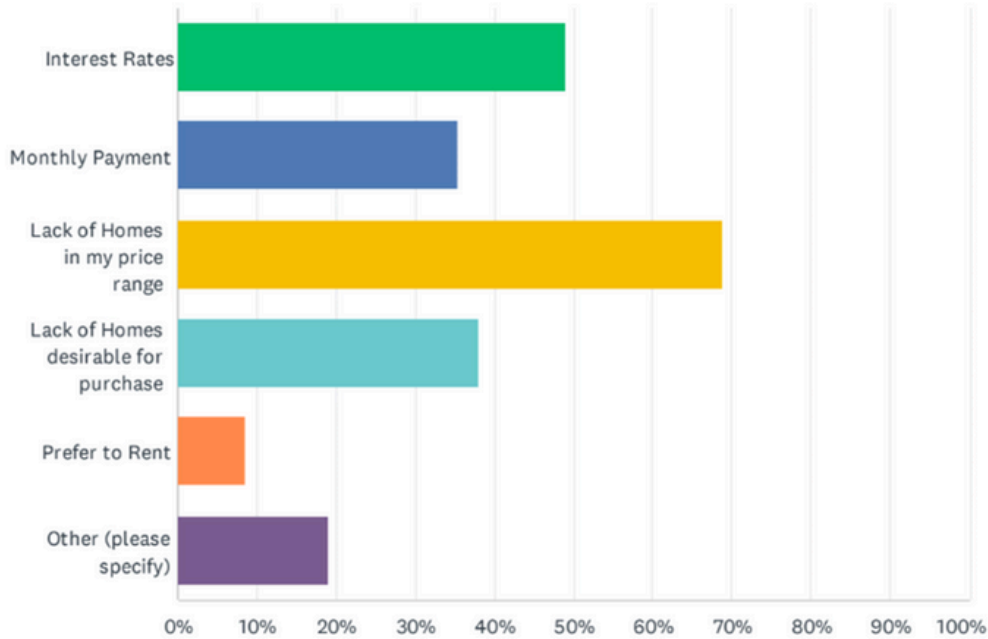
Q6 Do you plan to buy a NEW home within the next two years?



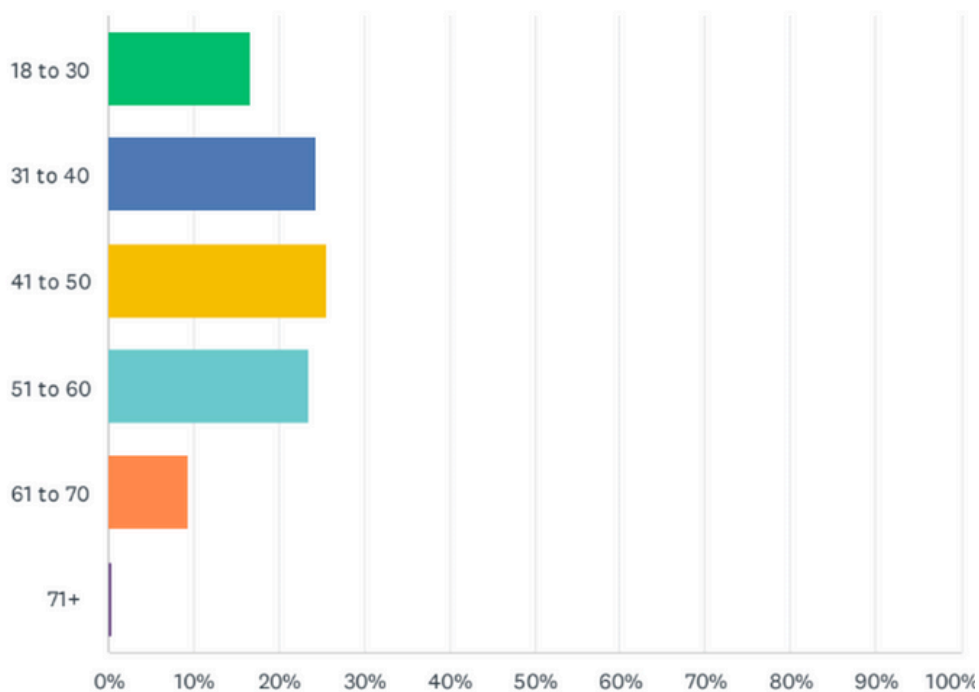
Q17 If looking to move, what is the maximum monthly mortgage payment you can afford? (excluding insurance and property taxes)



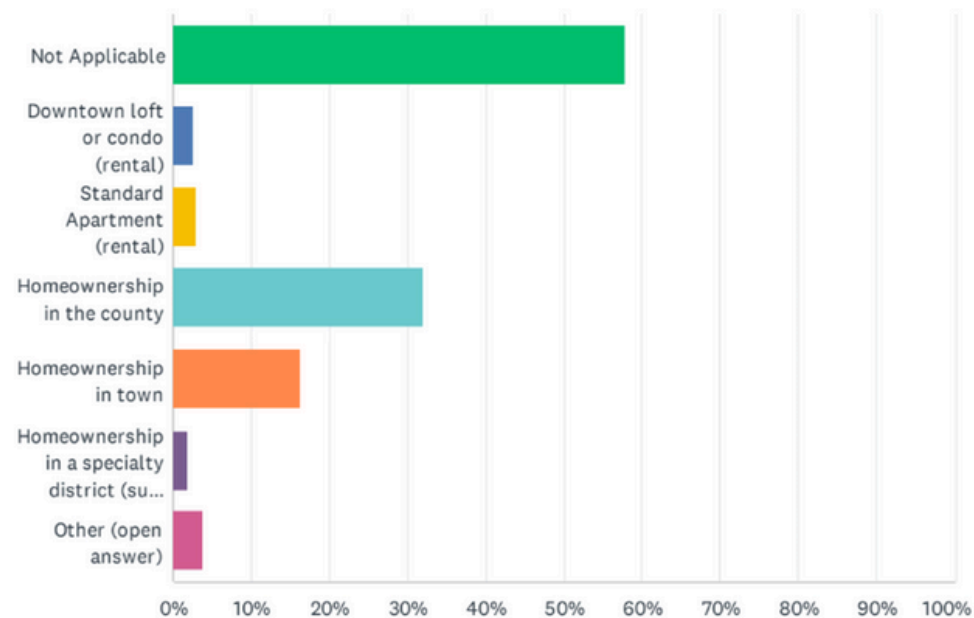
Q25 What prevents you from owning a home in Wayne County today?
(select all that apply)



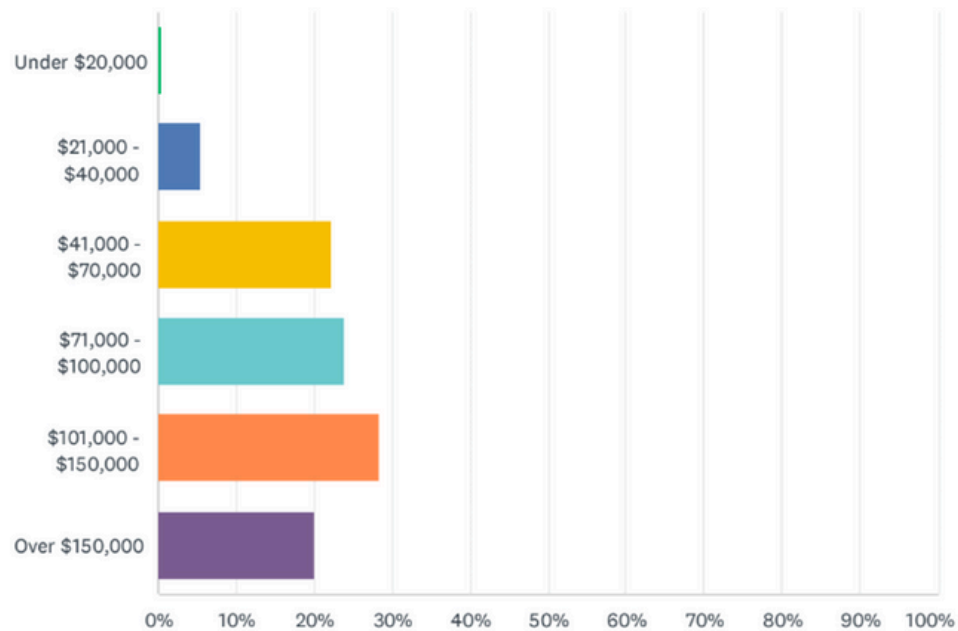
Q32 What is your age?



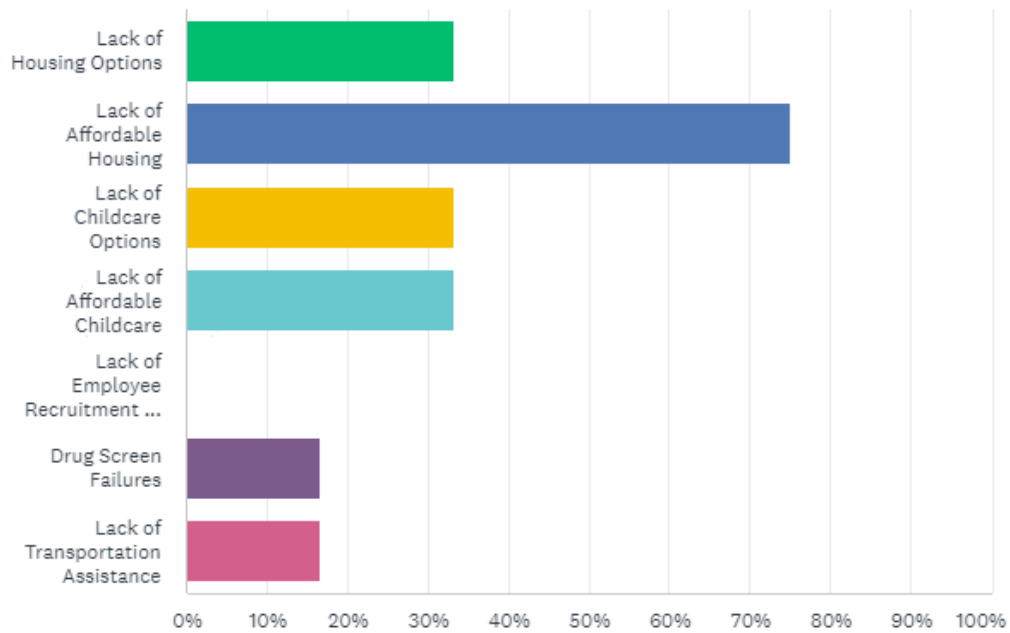
Q33 If you consider yourself a Young Professional (under 40 years of age), what type of living situation would be ideal for you in Wayne County? (Select all that apply)



Q35 For statistical purposes only, what was your total household income for 2023?



What are the top challenges for your company in filling open positions (choose top 3)?



Conclusions From Chapter 3:

Multiple stakeholders mentioned houses in the \$150,000-\$180,000 range need to be built and that the average production worker can only afford \$800-\$900/month.

- Wayne County residents can afford more expensive homes than was the general thought of the stakeholders.
- This means developers can make desired returns on investment if land is made available.
- Additionally, in most locations across America it is very difficult to attract developers to build for sale homes for less than \$200,000 in 2024, economic conditions make homes less than \$200,000 very hard to achieve a desired return on investment for developers.

The NIMBY (not in my backyard) attitude mentioned is not at all uncommon, rather Next Move Group hears that in almost every community in which we do business. It is important to understand the prices of homes needed will generate significant property tax revenue which trickles down to help existing residents with better roads, schools, parks, and infrastructure.

A significant opportunity for Wayne County to address the housing shortage is in rehabilitating derelict properties, multiple stakeholders mentioned this and the data supports this.



Chapter 4:

Housing Needs Assessment

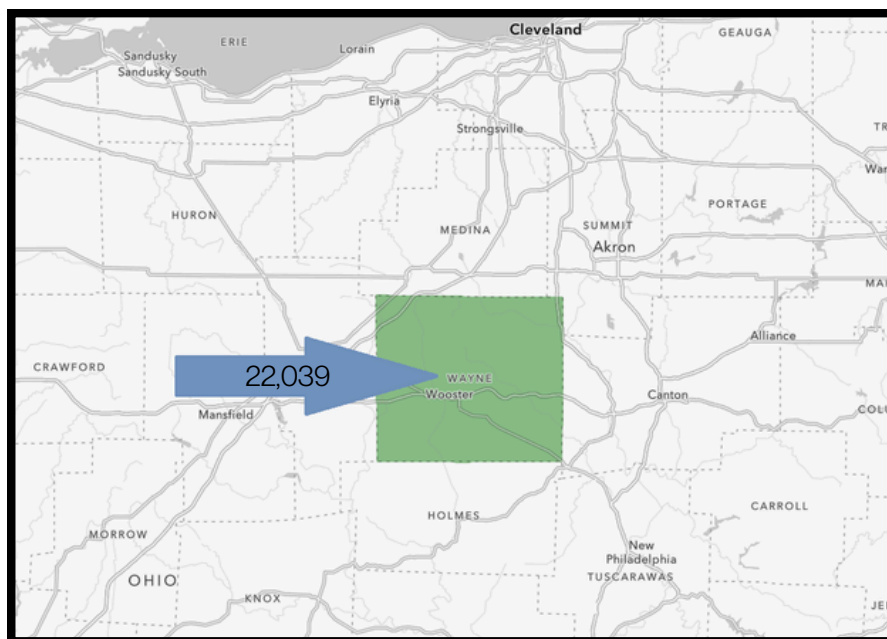


Wayne County, Ohio's population is expected to remain stable over the next five years. However, the county is projected to lose over 3,000 people in the 18-64 age group.

While a decline in the working-age population might suggest additional housing isn't needed, Team NEO economic workforce data indicates the opposite. According to Team NEO, 22,039 people who work in Wayne County live in another county, suggesting that a lack of housing options, rather than a shortage of jobs or economic factors, is driving them to live elsewhere.

Housing developments in Wayne County could help increase the population and support local industries by attracting more of the workforce to live within the county.

Map Below Indicates The Number Of People Driving To Work In Wayne County Daily While Living Elsewhere: 22,039.

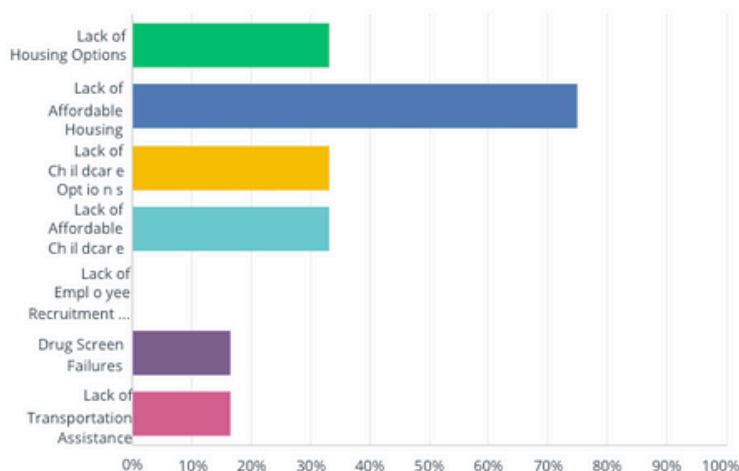


Source: Team NEO

Next Move Group surveyed employees from the following large employers to determine what would entice those who work in Wayne County but live elsewhere to relocate to the County:

- Akron Brass
- The Apple Creek Banking Company
- Aultman Orrville Hospital
- City of Orrville
- City of Wooster
- The Commercial Savings Bank
- Daisy Brand
- Morton Salt
- Seaman Corporation
- The Will-Burt Company
- United Titanium
- Ventrac
- Western Reserve Group Insurance
- Wooster Hydrostatics
- Wooster Hospital

Q5 What are the top challenges for your company in filling open positions (choose top 3)?



Employee Feedback Summary:

Below are key Employee Survey takeaways:

Homeownership Questions:

1. 12.5% of survey respondents plan to purchase a home in the next two years.
2. What size home would you be interested in purchasing if moving to Wayne County:
 - 44% - not looking to move (205)
 - 18% - more than 2,000 SF (84)
 - 31.5% - 1,500 to 2,000 SF (146)
 - 6% - less than 1,500 SF (28)
3. 71% of respondents currently spend less than \$2,000 per month on their mortgage.
4. If respondents were to move, they would be interested in moving to:
 - Anywhere in the County – 10%
 - Wooster – 20%
 - Orrville – 9%
 - Smithville – 4%
 - Apple Creek – 3%

The American Community Survey data below shows that Wayne County has a lower percentage of "cost-burdened" households—those spending more than 30% of their income on housing—compared to both the national and Ohio averages. This suggests that **housing affordability is not a major factor** deterring people who work in Wayne County from living there.

Instead, **the issue seems to be a shortage of available homes.**

Consequently, developers have an opportunity to construct for-sale and rental properties in Wayne County that could yield favorable returns on investment.

COST-BURDENED HOUSEHOLDS IN WAYNE COUNTY			
	Wayne County	Ohio	USA
<i>Percent of owner-occupied households that are cost-burdened</i>	18.40%	20.60%	27.90%
<i>Percent of renter-occupied households that are cost-burdened</i>	42.20%	46.80%	51.90%

Source: American Community Survey

The American Community Survey data shows that Wayne County’s current senior living providers are meeting the demand for senior housing. Consequently, Wayne County should focus its efforts on spurring housing developments for individuals who work in the county but currently live elsewhere.

UNDERHOUSED SENIORS	
Geography	Wayne County
Population 65+	21,271
Individuals aged 65+ living with others (non-spouse/partner)	1,268
Number of Individuals aged 65+ that would be expected to live with a non-spouse/partner based on Ohio Averages (12.6%)	2,680
Difference to indicate housing needed (Wayne County Does Not Need Additional Housing for Seniors)	Demand Met

Source: American Community Survey

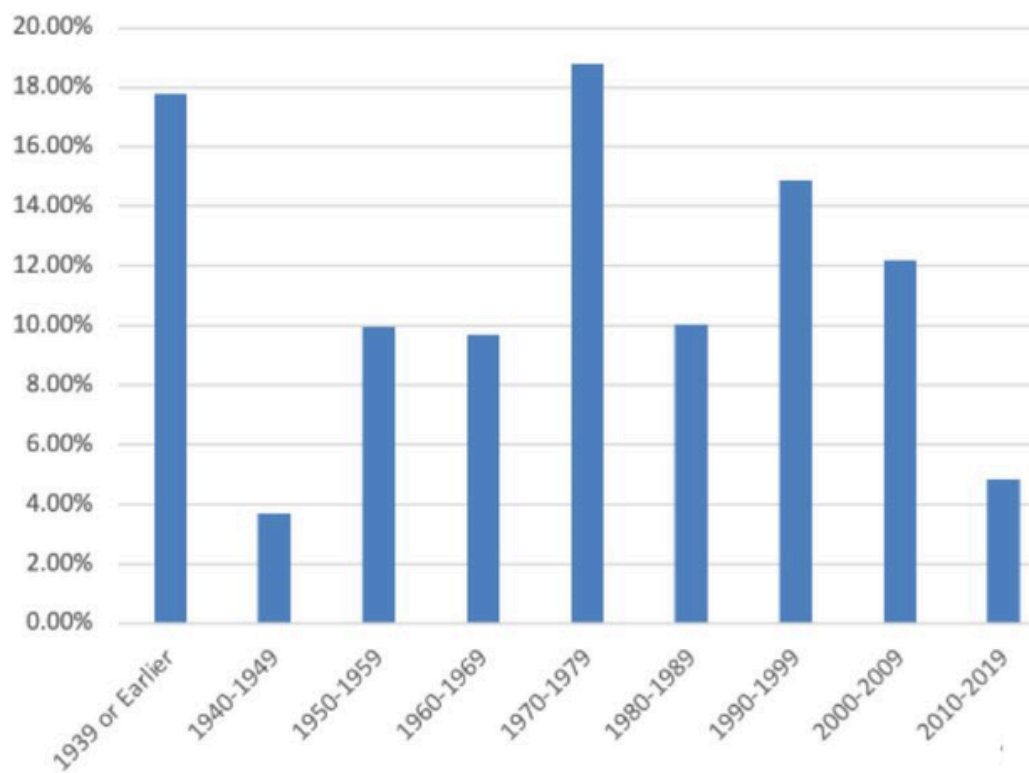
We analyzed data from the American Community Survey to identify the number of properties that are functionally obsolete, substandard, or derelict. It is generally accepted that 3% of all units built before 1939 are functionally obsolete, and units without complete plumbing and/or kitchen facilities are considered to be substandard. Renovating some of the derelict properties could create more inventory within Wayne County.

OBSOLETE, SUBSTANDARD, AND DERELICT HOUSING UNITS	
Geography	Wayne County
Total occupied housing units	44,206
Housing units built prior to 1939	7,136
Housing units considered functionally obsolete (3% of those built before 1939)	214
Units without complete plumbing	546
Units without complete kitchen facilities	576
<i>Minimum number of substandard units</i>	1,336

Source: American Community Survey

***Note. some of the above housing stock could include houses owned or occupied by those in the Amish community of Wayne County*

Housing Age Distribution



Source: American Community Survey

Conclusions From Chapter 4:

In order to increase population over the next 5 years, Wayne County, Ohio, **must add to the home inventory** so people who work in Wayne County, yet live outside the county, may be compelled to move to Wayne County.

Wayne County, Ohio, households are less “cost-burdened” by housing costs than both the USA and Ohio average by a significant degree, meaning **developers should be able to make a very positive return on investment** if developing housing in Wayne County because Wayne County residents can afford, without being burdened, higher costs of housing than is currently available.

This less-than-average “cost burdened” figure also indicates that **the primary issue in Wayne County is a lack of housing inventory** in general rather than too-expensive housing.

1,336 units within Wayne County are expected to be obsolete, substandard, or derelict. These create **an opportunity to provide inventory** to the housing market with investment (future chapters will address land use).

A blue-tinted photograph of a house with a 'HOUSE FOR SALE' sign in the foreground. The sign is white with black text and is mounted on a wooden post. The house in the background has a gabled roof and a central door. The entire image has a monochromatic blue color scheme.

HOUSE
FOR
SALE

Chapter 5:

Land Use, New Listings, Closed Sales, Average Sales Price, & Time On Market

Use Type	Wayne County, Ohio		
	2016	2024	CHANGE
Agricultural	80.53%	76.36%	-4.17%
Residential	15.00%	14.46%	-0.54%
Commercial	2.58%	7.34%	4.76%
Industrial	1.89%	1.84%	-0.05%

Wayne County, Ohio, Auditor

The data provided by the Wayne County, Ohio, Auditor’s Office shows that 76% of Wayne County’s 355,000 acres are currently classified as agricultural (269,800 acres), while only 14% are designated as residential (49,700 acres). Between 2016 and 2024, residential land use in Wayne County decreased by 0.54%, resulting in a reduction of 1,917 acres. During the same period, agricultural land use also declined by 4.17%. However, instead of being converted to residential or industrial use, this land was primarily reclassified for commercial purposes, with commercial land use increasing by 4.76%.

To encourage people working in Wayne County but living elsewhere to move into the county, it’s important to **prioritize converting land into residential areas rather than commercial spaces**. Generally, an increase in residential development leads to commercial growth, with the private sector meeting the demand for commercial services.

Surveys show that those driving to Wayne County to work prefer larger lots and larger yards which is why we recommend 175 acres along public wastewater rather than 125 acres, which would be the minimum zoning requirement.

A small yet vocal group of stakeholders interviewed in Wayne County expressed the need to protect agricultural land. However, if Wayne County were to convert the same amount of land to residential use over the next eight years as it did to commercial use in the previous eight years, **there would be sufficient acreage for the projected housing needs.**

Should the number of homes be built which are recommended in this study, a significant amount of new property tax will be created for each respective municipality, school district, etc. As a small example, a new home built in Wooster with an appraisal of \$300,000 would generate roughly \$4,454 in property taxes.

If 2,500 homes are built at a value of \$300,000 (which is likely a conservative estimate as many should be more expensive than this), this **would generate approximately \$11 million in additional property tax revenue per year** or \$110 million within 10 years (unless a property tax abatement was granted as an incentive).

Tax Estimate			
Tax District	64	Non Business Credit	-\$419.90
Effective Tax Rate	46.423209	Owner Occupancy Credit	\$0.00
Assessed Property Value	\$105,000.00	Homestead Reduction Credit	\$0.00
Net Tax	\$4,874.45	Total Credits	-\$419.90
Estimated Half-Year Tax	\$2,327.27	Estimated Annual Tax	\$4,454.54

The following chart, sourced from the Wayne-Holmes Association of Realtors, shows that compared to five years ago, new house listings have decreased by 4.5% and closed sales by 9.94%, while the average sales price has risen by 70% and the average time on the market has dropped by 37%.

This data supports the idea that the main issue in Wayne County’s housing market is the lack of inventory, not the price of homes. Despite higher prices, houses are selling faster now than in 2019, yet the supply has diminished.

	New Listings			Closed Sales			Average Sales Price			Average Market Time		
	Q1 2019	Q1 2024	Change	Q1 2019	Q1 2024	Change	Q1 2019	Q1 2024	Change	Q1 2019	Q1 2024	Change
Wayne County	216	208	-4.60%	171	154	-9.94%	\$148,714	\$253,216	70.27%	81	51	-37.04%

Source: Wayne-Holmes Association of Realtors, MLS Now Statistics

Conclusions From Chapter 5:

To increase the availability of land for residential developments, Wayne County should **focus on transitioning land to residential use**. If the land had not been converted to commercial use over the past eight years and had instead been designated for residential development, Wayne County would likely have the housing supply it currently needs. Moreover, as residential areas expand, the private sector generally meets commercial demand naturally.

If Wayne County converts sufficient land into residential areas, the resulting increase in property taxes would **significantly enhance the quality of life for all current residents**.

Data on new listings, closed sales, average sales price, and average market time reinforces the conclusion of this study: **the primary housing challenge in Wayne County is the lack of inventory, not the cost of homes on the market**.



Chapter 6:

Jobs & Demographics



Based on EMSI economic modeling data, Wayne County, Ohio, features a **high concentration of well-paying jobs** which are detailed below when looking at location quotients (LQs). This data supports previous conclusions indicating the price of homes is less of an issue than the available inventory of homes. Should developers build homes that are expensive enough to provide quality ROIs for developers, Wayne County **should have enough well-paying jobs to support those homes being bought or rented.**

Note, EMSI defines location quotient (LQ) as a way to measure how concentrated a specific industry, occupation, demographic group, or cluster is in a region compared to the nation. It's calculated by dividing an industry's share of a regional economic statistic by its share of the national total for the same statistic. For example, if an industry makes up 10% of jobs in a region but only 1% of jobs nationally, then the region's LQ for that industry is 10.

Here are some examples of LQs and what they mean:

- *LQ of 1.0: The region and the nation are equally specialized in that industry.*
- *LQ greater than 1: The region has a higher concentration of that industry than the nation. For example, if New York has a higher concentration of lawyers than the United States, then its LQ for lawyers would be greater than 1.*
- *LQ less than 1: The region is less concentrated in that industry than the nation.*

Covered Employment in Wayne County, Ohio, 2023Q41				
NAICS	Industry	Empl	Current Avg Ann Wages	LQ
339994	<i>Broom, Brush, and Mop Manufacturing</i>	565	\$42,775	214.15
313320	Fabric Coating Mills	176	\$59,259	80.95
336350	Motor Vehicle Transmission and Power Train Parts Manufacturing	1,686	\$66,520	65.49
332919	Other Metal Valve and Pipe Fitting Manufacturing	275	\$68,739	58.16
311421	Fruit and Vegetable Canning	982	\$111,047	54.59
333112	Lawn and Garden Tractor and Home Lawn and Garden Equipment Manufacturing	275	\$41,714	45.43
337122	Nonupholstered Wood Household Furniture Manufacturing	365	\$49,210	40.84
331221	Rolled Steel Shape Manufacturing	274	\$67,065	39.20
325991	Custom Compounding of Purchased Resins	180	\$52,536	32.50
311511	Fluid Milk Manufacturing	564	\$60,058	31.36
321999	All Other Miscellaneous Wood Product Manufacturing	238	\$47,525	26.74
336211	Motor Vehicle Body Manufacturing	480	\$56,986	25.26
332111	Iron and Steel Forging	162	\$70,017	24.45
326291	Rubber Product Manufacturing for Mechanical Use	213	\$47,366	23.31
327110	Pottery, Ceramics, and Plumbing Fixture Manufacturing	105	\$54,955	23.28
112340	Poultry Hatcheries	66	\$47,927	20.89
331511	Iron Foundries	224	\$63,585	20.80
332999	All Other Miscellaneous Fabricated Metal Product Manufacturing	509	\$69,873	18.88
332722	Bolt, Nut, Screw, Rivet, and Washer Manufacturing	212	\$74,460	18.33
332439	Other Metal Container Manufacturing	85	\$57,961	18.09
333120	Construction Machinery Manufacturing	427	\$59,502	17.72
424440	Poultry and Poultry Product Merchant Wholesalers	64	\$78,954	17.34
321920	Wood Container and Pallet Manufacturing	348	\$54,154	16.69
331318	Other Aluminum Rolling, Drawing, and Extruding	134	\$54,391	14.71
327310	Cement Manufacturing	67	\$83,456	14.04
322219	Other Paperboard Container Manufacturing	116	\$82,530	13.79
336214	Travel Trailer and Camper Manufacturing	193	\$48,242	13.21

334416	Capacitor, Resistor, Coil, Transformer, and Other Inductor Manufacturing	74	\$55,826	12.84
481212	Nonscheduled Chartered Freight Air Transportation	43	\$93,285	12.73
334418	Printed Circuit Assembly (Electronic Assembly) Manufacturing	242	\$58,227	12.47
327331	Concrete Block and Brick Manufacturing	73	\$65,950	12.02
424520	Livestock Merchant Wholesalers	62	\$14,366	11.97
339992	Musical Instrument Manufacturing	45	\$40,949	11.92
325120	Industrial Gas Manufacturing	80	\$100,523	11.75
332323	Ornamental and Architectural Metal Work Manufacturing	163	\$55,666	11.56
333243	Sawmill, Woodworking, and Paper Machinery Manufacturing	46	\$57,748	11.14
445132	Vending Machine Operators	126	\$29,884	10.64
486110	Pipeline Transportation of Crude Oil	40	\$117,158	10.46
112120	Dairy Cattle and Milk Production	345	\$37,541	10.14
337126	Household Furniture (except Wood and Upholstered) Manufacturing	32	\$53,332	9.80
326121	Unlaminated Plastics Profile Shape Manufacturing	71	\$52,414	9.79
114210	Hunting and Trapping	7	\$38,151	9.35
112310	Chicken Egg Production	63	\$47,970	9.13
325212	Synthetic Rubber Manufacturing	28	\$70,333	9.02
325311	Nitrogenous Fertilizer Manufacturing	26	\$79,929	8.99
333414	Heating Equipment (except Warm Air Furnaces) Manufacturing	47	\$50,823	8.84
321918	Other Millwork (including Flooring)	93	\$51,367	8.62
311119	Other Animal Food Manufacturing	98	\$67,714	8.32
449121	Floor Covering Retailers	183	\$56,783	8.12
322211	Corrugated and Solid Fiber Box Manufacturing	247	\$89,838	7.47
812220	Cemeteries and Crematories	85	\$47,687	7.46
111331	Apple Orchards	72	\$21,166	7.34
333912	Air and Gas Compressor Manufacturing	46	\$77,362	7.28
332215	Metal Kitchen Cookware, Utensil, Cutlery, and Flatware (except Precious) Manufacturing	22	\$77,145	7.18
115113	Crop Harvesting, Primarily by Machine	25	\$37,204	7.11
331492	Secondary Smelting, Refining, and Alloying of Nonferrous Metal (except Copper and Aluminum)	24	\$61,450	7.02
337211	Wood Office Furniture Manufacturing	37	\$54,919	7.02

324199	All Other Petroleum and Coal Products Manufacturing	10	\$71,178	6.85
332420	Metal Tank (Heavy Gauge) Manufacturing	78	\$67,494	6.45
541850	Indoor and Outdoor Display Advertising	63	\$40,958	6.34
541360	Geophysical Surveying and Mapping Services	29	\$62,037	6.34
444230	Outdoor Power Equipment Retailers	63	\$52,638	6.24
212311	Dimension Stone Mining and Quarrying	15	\$65,225	6.23
311615	Poultry Processing	483	\$52,880	6.22
488991	Packing and Crating	43	\$37,423	6.18
325612	Polish and Other Sanitation Good Manufacturing	49	\$59,145	6.17
238171	Residential siding contractors	73	\$57,702	6.13
336370	Motor Vehicle Metal Stamping	163	\$65,388	6.02
311611	Animal (except Poultry) Slaughtering	282	\$38,506	5.91
238132	Nonresidential framing contractors	36	\$58,317	5.90
424720	Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)	124	\$60,865	5.71
238131	Residential framing contractors	120	\$53,125	5.63
811420	Reupholstery and Furniture Repair	24	\$53,093	5.62
423820	Farm and Garden Machinery and Equipment Merchant Wholesalers	213	\$59,472	5.62
331210	Iron and Steel Pipe and Tube Manufacturing from Purchased Steel	47	\$61,493	5.44
811411	Home and Garden Equipment Repair and Maintenance	10	\$53,608	5.32
336320	Motor Vehicle Electrical and Electronic Equipment Manufacturing	104	\$61,838	5.25
326111	Plastic Bag and Pouch Manufacturing	63	\$47,683	5.01
325510	Paint and Coating Manufacturing	67	\$118,010	4.99
488210	Support Activities for Rail Transportation	60	\$55,513	4.94
311613	Rendering and Meat Byproduct Processing	13	\$83,781	4.79
111199	All Other Grain Farming	8	\$32,402	4.67
444140	Hardware Retailers	259	\$33,534	4.57
541490	Other Specialized Design Services	29	\$47,235	4.56
333992	Welding and Soldering Equipment Manufacturing	22	\$66,776	4.37
326199	All Other Plastics Product Manufacturing	421	\$51,619	4.22
337110	Wood Kitchen Cabinet and Countertop Manufacturing	157	\$51,901	4.13
424910	Farm Supplies Merchant Wholesalers	157	\$63,022	4.04

337121	Upholstered Household Furniture Manufacturing	64	\$51,214	4.04
321114	Wood Preservation	14	\$57,247	4.02
311919	Other Snack Food Manufacturing	61	\$69,751	3.87
336999	All Other Transportation Equipment Manufacturing	26	\$53,937	3.80
314120	Curtain and Linen Mills	17	\$37,693	3.79
238152	Nonresidential glass and glazing contractors	56	\$71,175	3.77
813910	Business Associations	142	\$83,306	3.68
327991	Cut Stone and Stone Product Manufacturing	41	\$46,891	3.61
332811	Metal Heat Treating	21	\$59,229	3.58
445230	Fruit and Vegetable Retailers	42	\$36,053	3.52
493130	Farm Product Warehousing and Storage	11	\$49,079	3.51
111336	Fruit and Tree Nut Combination Farming	8	\$22,096	3.47
623990	Other Residential Care Facilities	190	\$28,741	3.46
112210	Hog and Pig Farming	32	\$34,389	3.46
611710	Educational Support Services	261	\$34,354	3.36
337215	Showcase, Partition, Shelving, and Locker Manufacturing	39	\$81,239	3.23
424950	Paint, Varnish, and Supplies Merchant Wholesalers	24	\$71,710	3.16
321113	Sawmills	81	\$61,268	3.09
321912	Cut Stock, Resawing Lumber, and Planing	13	\$38,109	3.06
325211	Plastic Material and Resin Manufacturing	60	\$79,697	3.05
336310	Motor Vehicle Gasoline Engine and Engine Parts Manufacturing	54	\$62,831	2.90
444240	Nursery, Garden Center, and Farm Supply Retailers	145	\$41,802	2.88
238122	Nonresidential structural steel contractors	69	\$72,385	2.88
111219	Other Vegetable (except Potato) and Melon Farming	61	\$37,417	2.87
316990	Other Leather and Allied Product Manufacturing	10	\$26,169	2.87
524126	Direct Property and Casualty Insurance Carriers	422	\$81,931	2.86
621420	Outpatient Mental Health and Substance Abuse Centers	293	\$45,360	2.82
212321	Construction Sand and Gravel Mining	28	\$208,898	2.82
519210	Libraries and Archives	141	\$25,115	2.81
926140	Regulation of Agricultural Marketing and Commodities	75	\$72,081	2.81

221113	Nuclear Electric Power Generation	36	\$123,920	2.71
221320	Sewage Treatment Facilities	52	\$63,487	2.70
445240	Meat Retailers	54	\$26,927	2.68
444120	Paint and Wallpaper Retailers	37	\$65,904	2.67
327390	Other Concrete Product Manufacturing	49	\$59,832	2.67
484220	Specialized Freight (except Used Goods) Trucking, Local	193	\$59,126	2.64
238141	Residential masonry contractors	60	\$43,960	2.61
541922	Commercial Photography	9	\$40,266	2.54
624310	Vocational Rehabilitation Services	247	\$20,896	2.52
811114	Specialized Automotive Repair	36	\$45,548	2.42
455219	All Other General Merchandise Retailers	483	\$28,701	2.41
713950	Bowling Centers	54	\$15,407	2.39
423510	Metal Service Centers and Other Metal Merchant Wholesalers	101	\$72,671	2.38
423320	Brick, Stone, and Related Construction Material Merchant Wholesalers	52	\$64,871	2.38
623110	Nursing Care Facilities (Skilled Nursing Facilities)	1,095	\$35,520	2.31
485999	All Other Transit and Ground Passenger Transportation	26	\$38,439	2.30
332321	Metal Window and Door Manufacturing	51	\$48,303	2.30
424430	Dairy Product (except Dried or Canned) Merchant Wholesalers	24	\$83,143	2.26
311612	Meat Processed from Carcasses	109	\$64,405	2.24
238111	Residential poured foundation contractors	88	\$79,441	2.24
621391	Offices of Podiatrists	24	\$47,623	2.19
541350	Building Inspection Services	19	\$38,833	2.16
333995	Fluid Power Cylinder and Actuator Manufacturing	11	\$59,197	2.14
321911	Wood Window and Door Manufacturing	40	\$63,207	2.13
925110	Administration of Housing Programs	43	\$52,988	2.09
522180	Savings Institutions and Other Depository Credit Intermediation	65	\$49,863	2.07
551114	Corporate, Subsidiary, and Regional Managing Offices	1,631	\$88,514	2.06
334510	Electromedical and Electrotherapeutic Apparatus Manufacturing	50	\$97,266	2.06
311942	Spice and Extract Manufacturing	18	\$90,668	2.04
459510	Used Merchandise Retailers	133	\$19,853	2.04

POPULATION SUMMARY						
Municipality	2023 Total Population	2028 Total Population	% Change	2023 Household Population	2028 Household Population	% Change
Wayne County	116,939	116,221	-0.61%	112,893	112,175	-0.64%
Apple Creek Village	1,183	1,162	-1.78%	1,183	1,162	-1.78%
Doylestown Village	3,017	2,967	-1.66%	2,956	2,906	-1.69%
Orrville City	8,392	8,265	-1.51%	8,255	8,128	-1.54%
Rittman City	6,208	6,269	0.98%	6,149	6,210	0.99%
Shreve Village	1,473	1,441	-2.17%	1,473	1,441	-2.17%
Smithville Village	1,356	1,394	2.80%	1,356	1,394	2.80%
Wooster City	27,650	27,724	0.27%	24,426	24,500	0.30%

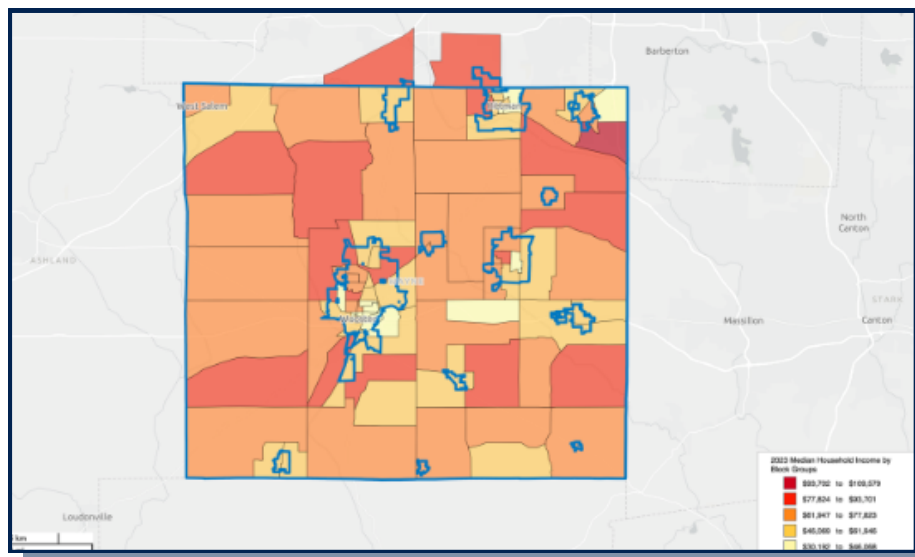
Source: Jobs EQ

HOUSEHOLDS SUMMARY			
Municipality	2023 Total Households	2028 Total Households	% Change
Wayne County	44,313	44,519	0.46%
Apple Creek Village	446	443	-0.68%
Doylestown Village	1,259	1,249	-0.80%
Orrville City	3,511	3,499	-0.34%
Rittman City	2,622	2,674	1.94%
Shreve Village	636	632	-0.63%
Smithville Village	565	581	2.75%
Wooster City	11,267	11,428	1.41%

Source: Jobs EQ

Household Income Distribution & Median Household Incomes, 2023										
Municipality	< \$15,000	\$15,000- \$24,999	\$25,000- \$34,999	\$35,000- \$49,999	\$50,000- \$74,999	\$75,000- \$99,999	\$100,00- \$149,999	\$150,000- \$199,999	\$200,000+	Median Household Income
Wayne County	7.48%	7.88%	10.52%	12.05%	21.21%	15.30%	15.34%	5.81%	4.41%	\$61,672
Apple Creek Village	7.62%	6.50%	12.33%	13.68%	19.73%	12.11%	25.34%	1.79%	0.90%	\$60,017
Creston Village	8.98%	9.43%	8.52%	10.34%	21.36%	14.55%	19.32%	4.77%	2.73%	\$62,355
Dalton Village	5.78%	9.68%	13.17%	11.96%	20.97%	17.07%	14.78%	2.69%	3.90%	\$58,710
Doylestown Village	5.64%	8.10%	8.90%	14.30%	19.14%	14.69%	18.19%	4.69%	6.35%	\$64,861
Fredericksburg Village	1.94%	3.87%	17.42%	8.39%	27.10%	19.35%	7.10%	6.45%	8.39%	\$64,308
Marshallville Village	2.90%	6.45%	10.00%	13.87%	23.23%	14.52%	15.16%	6.77%	7.10%	\$65,788
Mount Eaton Village	11.43%	8.57%	1.43%	7.14%	21.43%	20.00%	14.29%	11.43%	4.29%	\$75,000
Orrville City	5.04%	8.00%	10.37%	15.21%	21.59%	15.15%	15.61%	6.29%	2.73%	\$60,571
Rittman City	9.08%	9.69%	15.45%	11.86%	20.14%	14.91%	12.20%	2.90%	3.78%	\$53,390
Shreve Village	12.58%	10.06%	9.59%	11.95%	26.73%	11.16%	11.64%	1.10%	5.19%	\$53,544
Smithville Village	7.79%	7.26%	5.49%	14.69%	22.30%	15.04%	15.58%	5.31%	6.55%	\$64,125
Wooster City	10.93%	9.58%	11.52%	12.30%	20.62%	14.96%	10.79%	4.92%	4.38%	\$54,942

Source: ESRI



15% of USA households live below the poverty line while 16% of Ohio households live below the poverty line. **Wayne County, Ohio’s, percentage of households below the poverty line is substantially less than both the national average and Ohio average.**

Households Below Poverty Line		
Municipality	% of Total Households	Households Below Poverty Level
Wayne County	9.88%	4,343
Orrville City	7.84%	258
Wooster City	12.97%	1,442
USA	15%	--
Ohio	16%	--

Source: Data USA

Household Income	2024 Number	2029 Number	Change
<\$15,000	2,510	2,065	-445
\$15,000-\$24,999	3,717	3,076	-641
\$25,000-\$34,999	3,500	2,907	-593
\$35,999-\$49,999	4,826	4,228	-598

Source: ESRI

The table below reveals a significant challenge for the agricultural community in Wayne County, Ohio. The fourth quarter consistently shows the highest employment of agricultural workers in the county, with farm labor increasing by 26.42% since 2020. This growth is striking compared to Ohio’s overall 8.8% increase in agricultural labor and the national average, which has declined by 6.8% over the same period.

Despite this substantial rise in farm labor, new house listings have dropped by 4.5% since 2019, and as of August 10, 2024, only 51 homes are available for rent in Wayne County on Zillow. **The limited availability of housing could pose a threat to Wayne County farmers** if not addressed.

Agricultural Employment - Wayne County					
Quarter	Crop Production	Animal Production and Aquaculture	Support Activities for Agriculture and Forestry	Total	Growth
2020 Q4	309	425	46	780	
2021 Q4	346	444	42	832	6.25%
2022 Q4	410	511	43	964	13.69%
2023 Q4	499	524	37	1060	9.06%
Overall Growth in Agricultural Labor From 2020 to 2023					26.42%

Source: US Census Quarterly Workforce Indicators

Conclusions From Chapter 6:

Wayne County, Ohio, has a substantial concentration of well-paying jobs, reinforcing the conclusion that **housing developers can price new homes in Wayne County at sufficient levels to achieve desired returns on investment.**

A major concern for Wayne County farmers is that agricultural employment is increasing at a rate significantly higher than both Ohio and national averages. At the same time, **the county's housing inventory continues to decline.**



Chapter 7:

Permitting & Incentives



A concern expressed by existing developers in Wayne County is the ability to make it easier to build housing. Note, Next Move Group hears a similar concern in 90% of the communities with which we work, so that concern is not alarming to us. Thus, our team investigated current standards for permitting and incentives, finding various examples throughout the community depending on the jurisdiction.

Wayne County has an online step-by-step guide for procedures to obtain a building permit along with downloadable forms. However, Wayne County currently does not offer any incentives toward residential development.

Communities across Wayne County offer Community Reinvestment Area (CRA) as a useful tool for developers seeking redevelopment incentives.



Wayne County **offers incentives for both residents and developers.**

Residents in the county can use the CHIP program, which provides direct grants to low-to-moderate-income homeowners to repair their homes.

Additionally, municipalities within Wayne County offer the following CRA incentives for residential projects:

CRA INCENTIVES AVAILABLE IN WAYNE COUNTY FOR RESIDENTIAL DEVELOPERS:

Location	Commercial			Residential		
	Abatement Percentage	Duration (years)	Minimum Investment	Abatement Percentage	Duration (years)	Minimum Investment
Dalton	Up to 100%	15 years	\$5,000	-	-	-
Doylestown	Up to 100%	15 years	\$5,000	100%	15 years	\$2,500
Orrville	Up to 100%	15 years	Case by Case	50% (existing) No new construction	10 years	\$2,500
Rittman	100%	15 years	\$5,000	100% (new)	15 years	\$2,500
Shreve	Up to 100%	15 years	5,000	50%	10 years	2,500
Smithville	Up to 100%	15 years	5,000	50% 50%	10 years 10 years	2,500 – 5,000 remodel 5,000 new construction
Wooster	Up to 100%	12 years (existing) 15 years (new)	Case by Case	100%	10 years (existing) 12 years (new)	\$2,500

Conclusions From Chapter 7:

Next Move Group finds there is **no disadvantage in the permitting process** for developers in Wayne County compared to most communities.

Each example of TIF or CRA's being used to spur residential developments needs to be captured so the examples can be marketed to developers.

Some developers might object to existing density requirements within Wayne County; however, Next Move Group believes **an effort to change them could result in pushback from the community**, and we believe the demand for homes priced above average market rates give the opportunity for developers to achieve desired returns on investment without substantial zoning changes.

Next Move Group feels the **biggest issue in why homes have not been built is the lack of available land for residential use.**

Appendix:

Total Housing Units - 2023				
Municipality	Total Housing Units	% of Total	Owner- Occupied	Renter- Occupied
Wayne County	46,900	100.00%	72.99%	27.01%
Apple Creek Village	477	1.71%	64.13%	35.87%
Creston Village	915	1.95%	83.52%	16.48%
Dalton Village	787	1.68%	74.73%	25.27%
Doylestown Village	1,320	2.81%	75.93%	24.07%
Fredericksburg Village	171	0.36%	81.94%	18.06%
Marshallville Village	314	0.74%	78.06%	21.94%
Mount Eaton Village	79	0.17%	84.29%	15.71%
Orrville City	3,740	7.97%	66.88%	33.12%
Rittman City	2,798	5.97%	62.66%	37.34%
Shreve Village	684	1.46%	65.41%	34.59%
Smithville Village	599	1.28%	75.75%	24.25%
Wooster City	12,059	25.71%	59.47%	40.53%

Median Home Value - 2023 to 2028				
Municipality	2023 Median Home Value	2028 Median Home Value	2023 - 2028 (#)	2023 - 2028 (%)
Wayne County	\$219,781	\$259,774	\$39,993	18.20%
Apple Creek Village	\$262,500	\$318,966	\$56,466	21.51%
Creston Village	\$159,157	\$206,389	\$47,232	29.68%
Dalton Village	\$201,911	\$226,330	\$24,419	12.09%
Doylestown Village	\$208,805	\$252,696	\$43,891	21.02%
Fredericksburg Village	\$377,586	\$398,649	\$21,063	5.58%
Marshallville Village	\$303,030	\$342,929	\$39,899	13.17%
Mount Eaton Village	\$402,174	\$408,824	\$6,650	1.65%
Orrville City	\$174,755	\$208,604	\$33,849	19.37%
Rittman City	\$157,439	\$187,611	\$30,172	19.16%
Shreve Village	\$160,000	\$183,129	\$23,129	14.46%
Smithville Village	\$215,766	\$249,091	\$33,325	15.44%
Wooster City	\$188,565	\$223,100	\$34,535	18.31%

AGE COHORT PROJECTIONS					
		Child Population (under 18)	Young Adult Population (18-34)	Remainder Working-Age Population (35-64)	Senior Population (65+)
WAYNE COUNTY	2023	26,562	24,867	42,559	22,951
	2028	26,655	22,556	41,525	25,485
	Change	0.35%	-9.29%	-2.43%	11.04%
APPLE CREEK	2023	296	230	451	206
	2028	302	201	440	219
	Change	2.02%	-12.61%	-2.44%	6.31%
CRESTON VILLAGE	2023	420	404	875	412
	2028	427	327	860	468
	Change	1.67%	-19.06%	-1.71%	13.59%
DALTON VILLAGE	2023	431	351	725	416
	2028	408	305	718	469
	Change	-5.34%	-13.12%	-0.97%	12.74%
DOYLESTOWN VILLAGE	2023	634	571	1,142	670
	2028	603	513	1,103	748
	Change	-4.89%	-10.16%	-3.42%	11.64%
FREDERICKSBURG VILLAGE	2023	148	96	128	56
	2028	140	81	153	44
	Change	-5.41%	-15.63%	19.53%	-21.43%
MARSHALLVILLE VILLAGE	2023	176	133	323	147
	2028	168	106	330	157
	Change	-4.55%	-20.30%	2.17%	6.80%
MOUNT EATON VILLAGE	2023	56	41	70	20
	2028	74	42	73	30
	Change	32.14%	2.44%	4.30%	50.00%
ORRVILLE CITY	2023	1,748	1,817	3,156	1,671
	2028	1,725	1,605	3,118	1,817
	Change	-1.32%	-6.71%	-1.20%	8.74%
RITTMAN CITY	2023	1,345	1,230	2,455	1,178
	2028	1,373	1,195	2,414	1,287
	Change	2.08%	-2.85%	-1.67%	9.25%
SHREVE VILLAGE	2023	337	325	548	263
	2028	350	299	515	277
	Change	3.86%	22.77%	-6.02%	5.32%
SMITHVILLE VILLAGE	2023	232	277	556	291
	2028	253	234	577	330
	Change	9.05%	-15.52%	3.78%	13.40%
WOOSTER CITY	2023	5,144	7,264	9,250	5,992
	2028	5,204	7,205	8,816	6,499
	Change	1.17%	-0.81%	-4.69%	8.46%

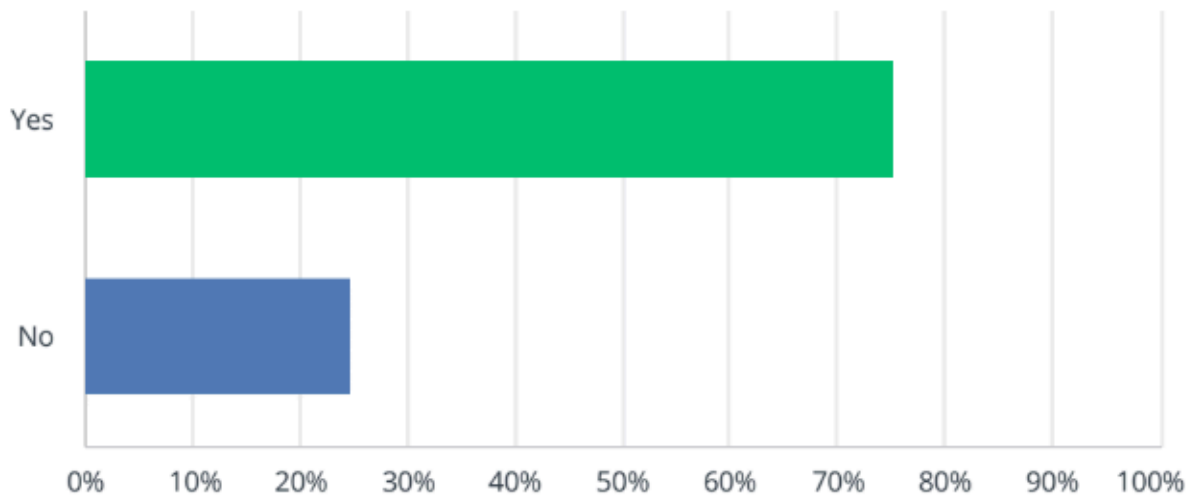
SOURCE: ESRI

POPULATION & HOUSEHOLD PROJECTIONS					
	Year	Population	Family Population	Households	Avg. Household Size
WAYNE COUNTY	2023	116,939	93,824	44,313	2.55
	2028	116,221	92,819	44,519	2.52
	Change	-0.61%	-1.07%	0.46%	-1.18%
APPLE CREEK	2023	1,183	985	446	2.65
	2028	1,162	954	443	2.62
	Change	-1.76%	-3.15%	-0.67%	-1.13%
CRESTON VILLAGE	2023	2,111	1,754	880	2.40
	2028	2,082	1,715	879	2.37
	Change	-1.37%	-2.22%	-0.11%	-1.25%
DALTON VILLAGE	2023	1,923	1,468	744	2.41
	2028	1,900	1,451	741	2.39
	Change	-1.20%	-1.16%	0.14%	-0.83%
DOYLESTOWN VILLAGE	2023	3,017	2,389	1,259	2.35
	2028	2,967	2,336	1,249	2.33
	Change	-1.66%	-2.21%	-0.79%	-0.85%
FREDERICKSBURG VILLAGE	2023	428	308	155	2.76
	2028	418	300	153	2.73
	Change	-2.34%	-2.60%	-1.29%	-1.09%
MARSHALLVILLE VILLAGE	2023	779	652	310	2.51
	2028	761	632	308	2.47
	Change	-2.31%	-0.0307	-0.0065	-1.59%
MOUNT EATON VILLAGE	2023	187	83	70	2.67
	2028	219	121	81	2.70
	Change	17.11%	45.78%	15.71%	1.12%
ORRVILLE CITY	2023	8,392	6,659	3,511	2.35
	2028	8,265	6,515	3,499	2.32
	Change	-1.51%	-2.16%	-0.34%	-1.28%
RITTMAN CITY	2023	6,208	5,059	2,622	2.35
	2028	6,269	5,071	2,674	2.32
	Change	0.98%	0.24%	1.98%	-1.28%
SHREVE VILLAGE	2023	1,473	1,150	636	2.32
	2028	1,441	1,113	632	2.28
	Change	-2.17%	-3.22%	-0.63%	-1.72%
SMITHVILLE VILLAGE	2023	1,356	1,116	565	2.40
	2028	1,394	1,148	581	2.40
	Change	2.80%	2.87%	2.83%	0.00%
WOOSTER CITY	2023	27,650	17,921	11,267	2.17
	2028	27,724	17,889	11,428	2.14
	Change	0.23%	-0.18%	1.43%	-1.38%

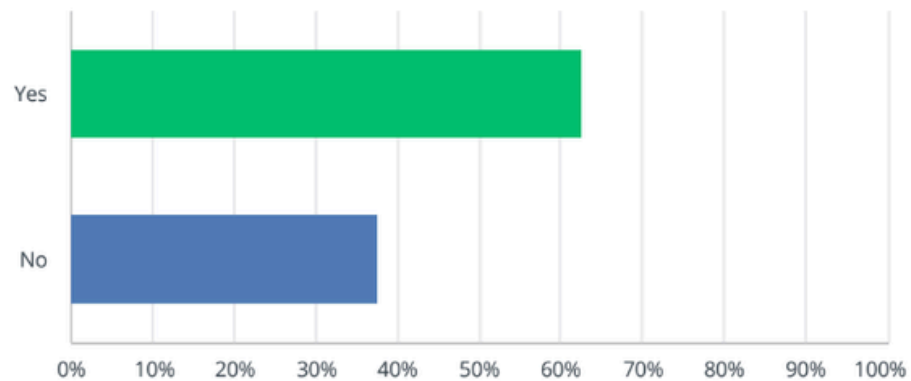
Source: American Community Survey 5-Yr Estimates

Survey Results Of People Working In Wayne County:

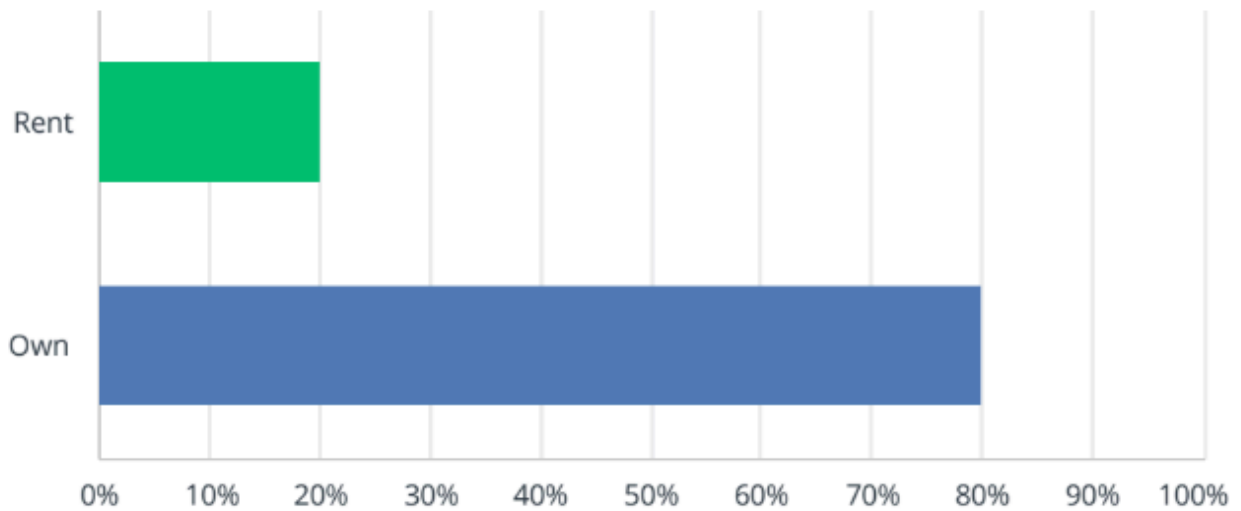
Q1 Do you currently live in Wayne County?



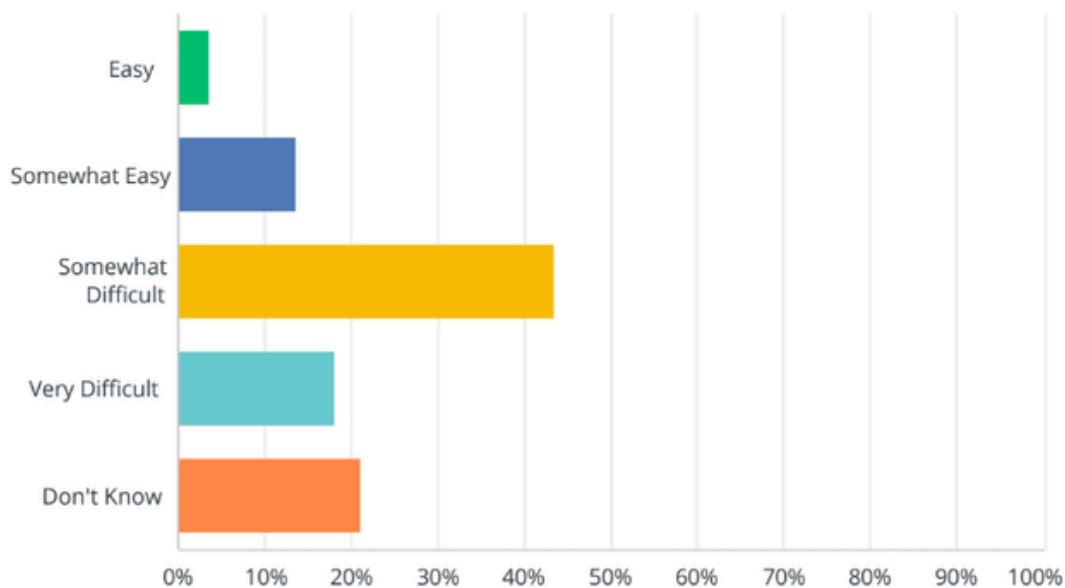
Q2 Would you consider moving to Wayne County if affordable housing was available?



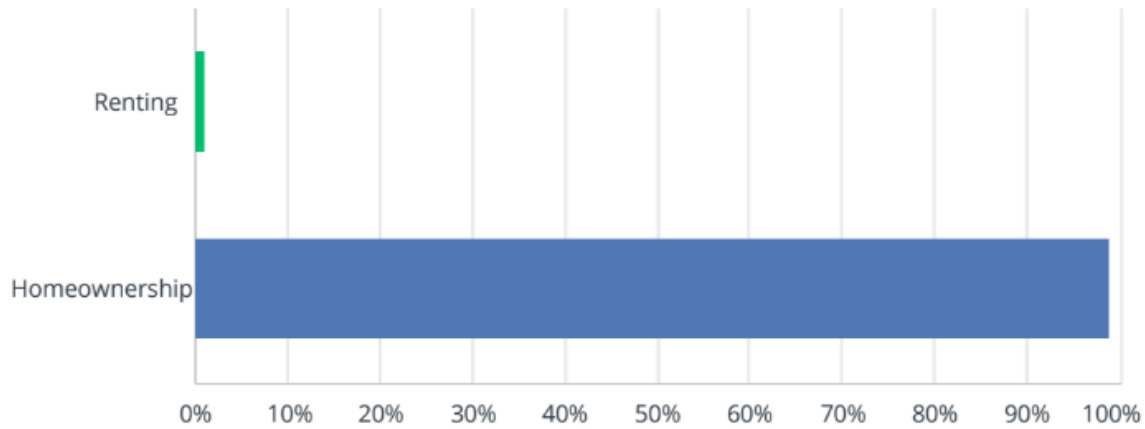
Q3 Do you rent or own your home?



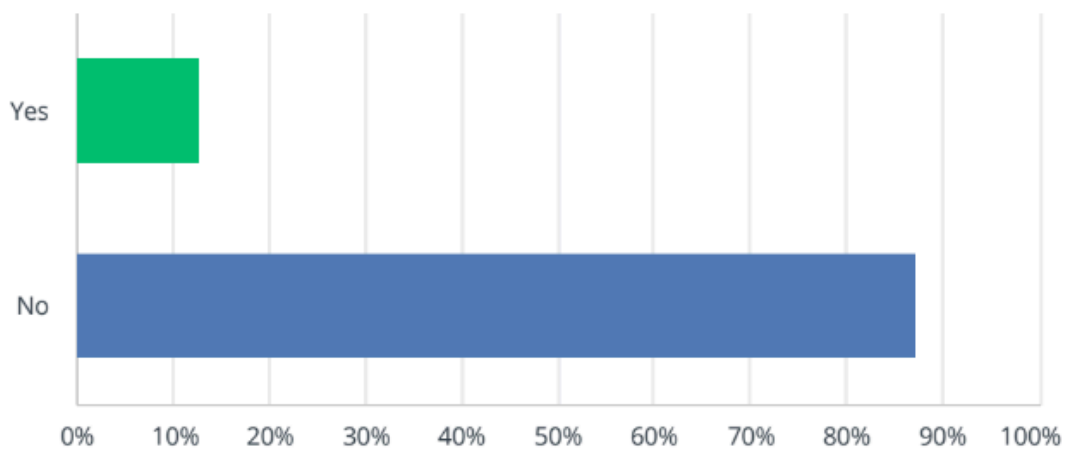
Q4 How would you describe the ability to secure any type of housing (rental or single-family) in Wayne County today?



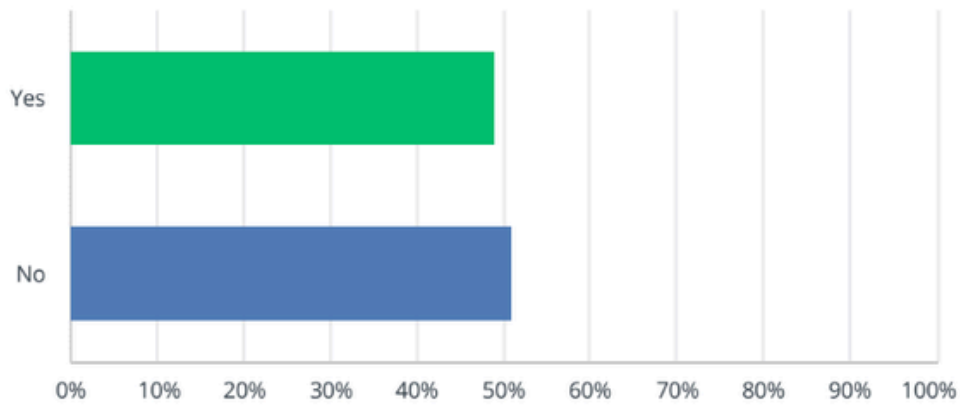
Q5 As a lifestyle choice do you prefer homeownership or renting?



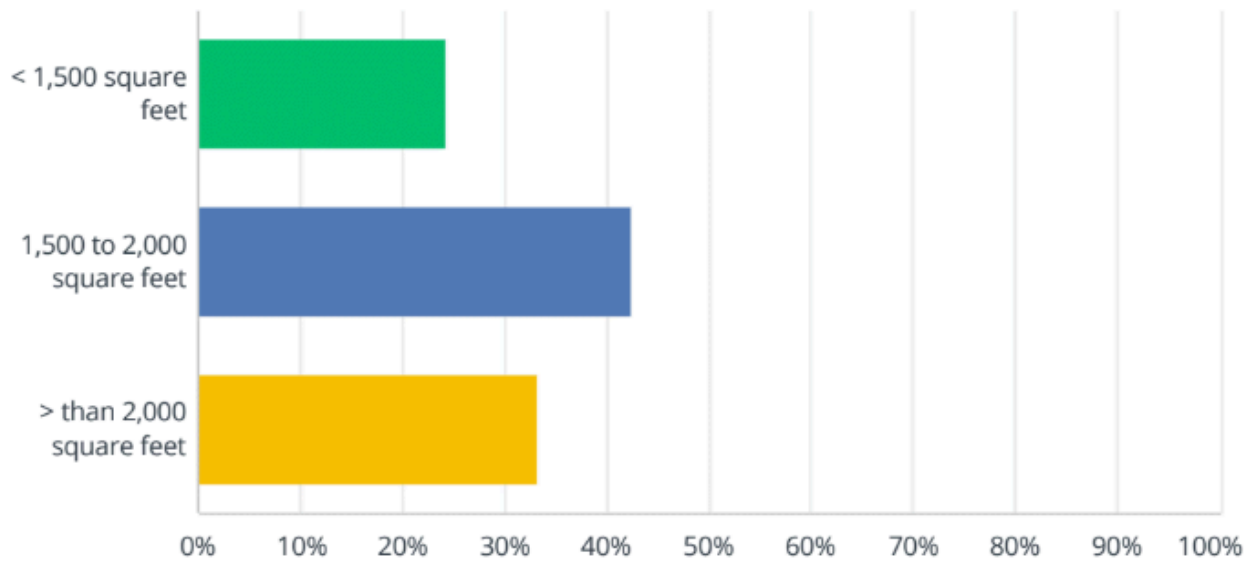
Q6 Do you plan to buy a NEW home within the next two years?



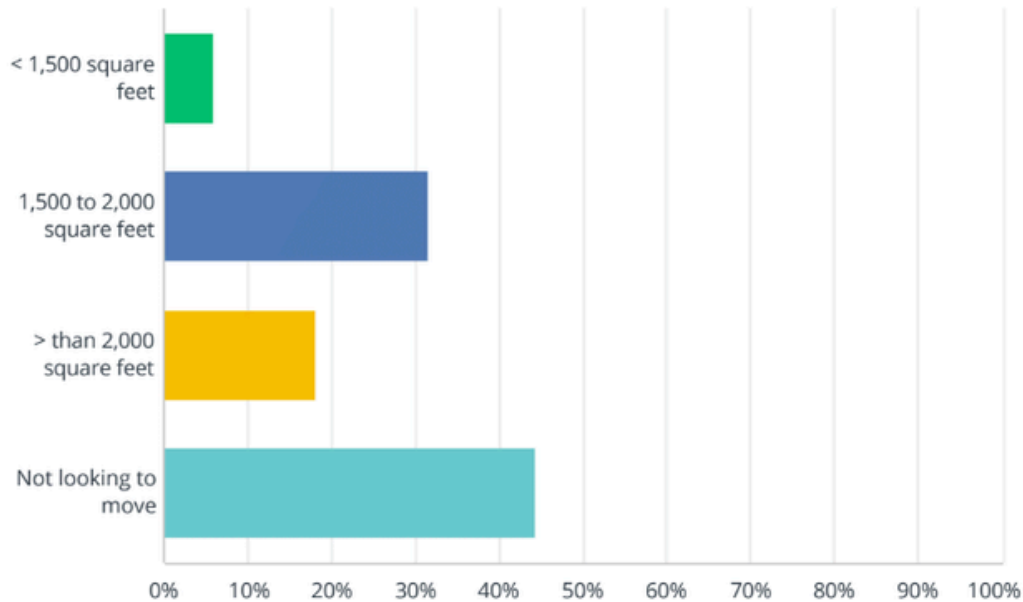
Q7 Did property tax rates have an impact on your decision where to purchase your home?



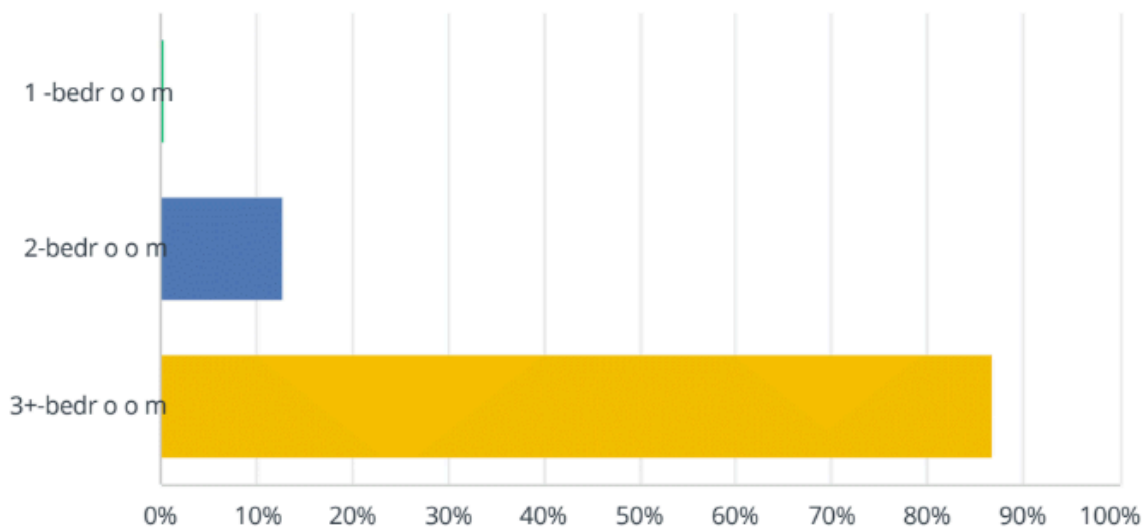
Q8 What size home do you currently own?



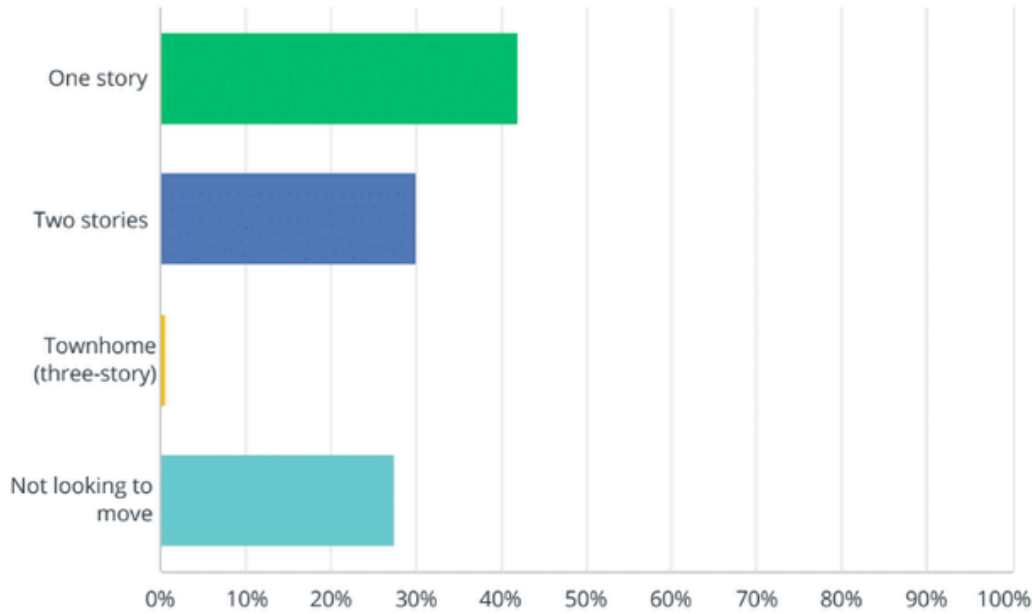
Q9 What size home would you be interested in purchasing if looking to move?



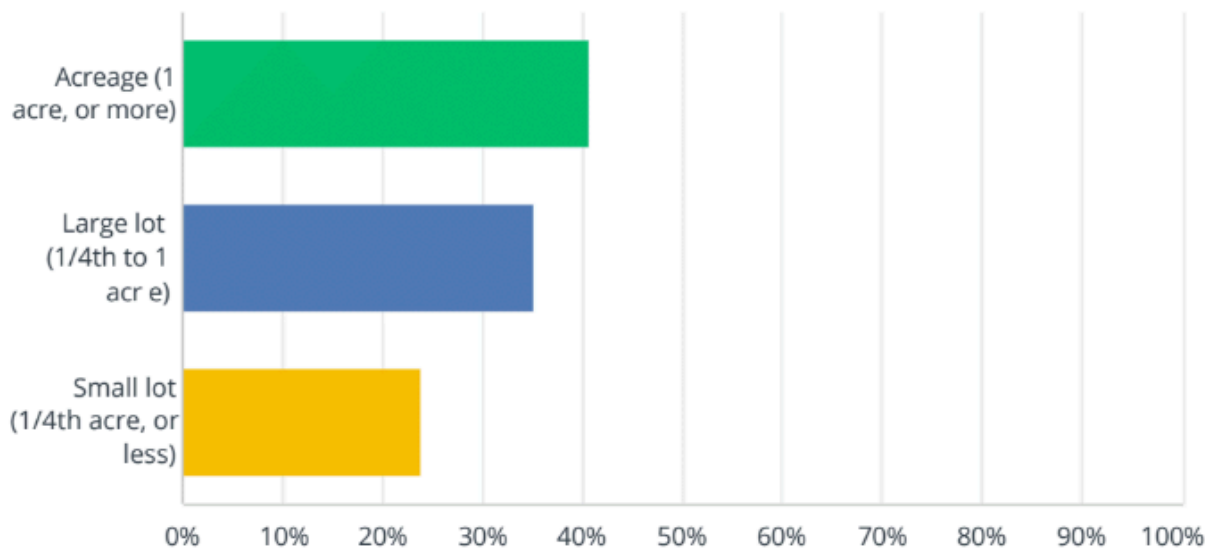
Q10 How many bedrooms is your current home?



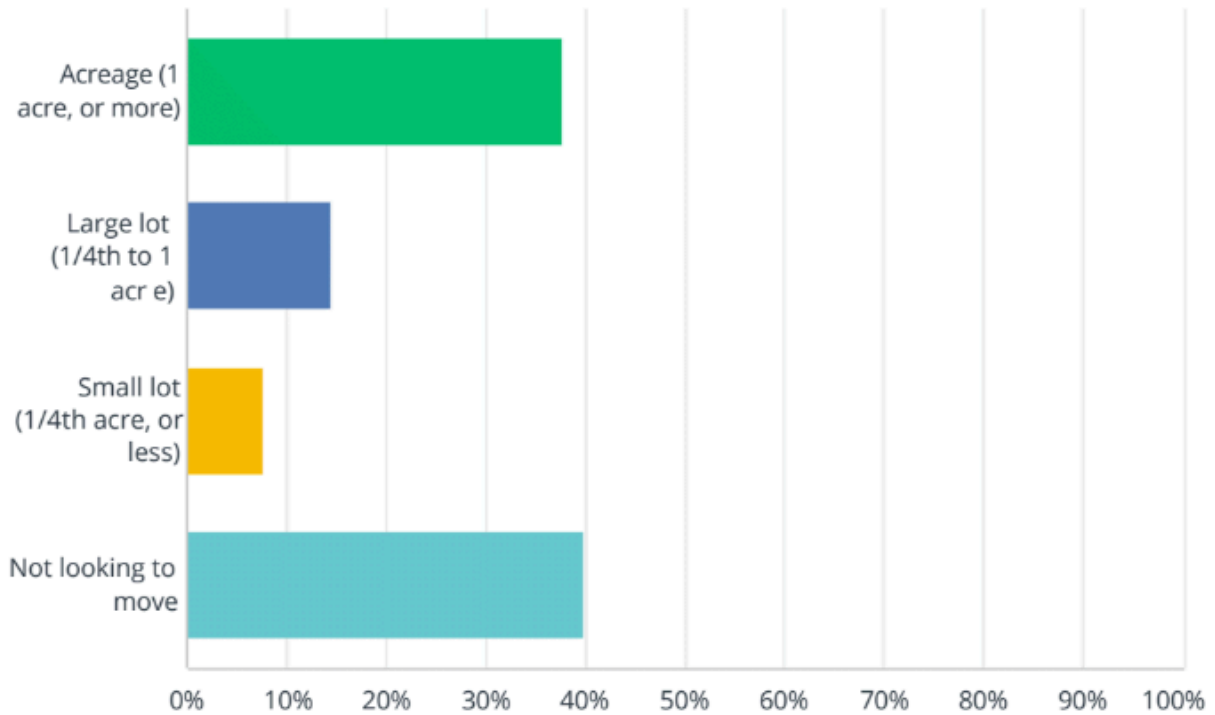
Q11 What is your preference: a one, two, or three-story home?



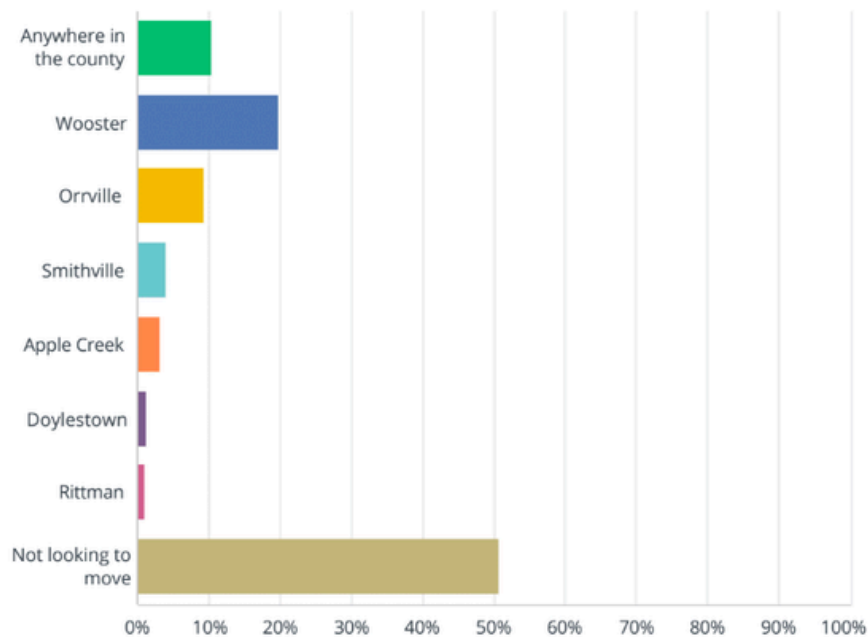
Q12 What size lot do you currently have?



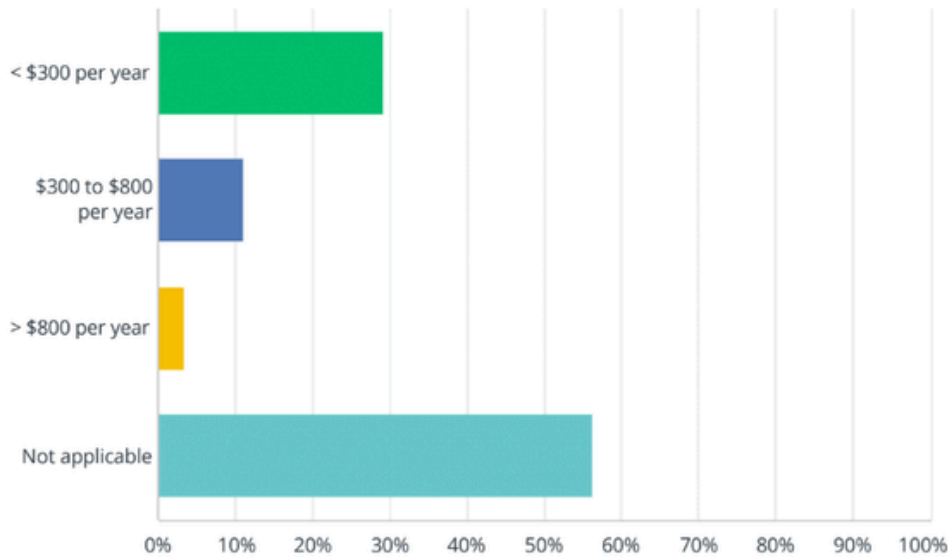
Q13 What size lot do you prefer if looking to move?



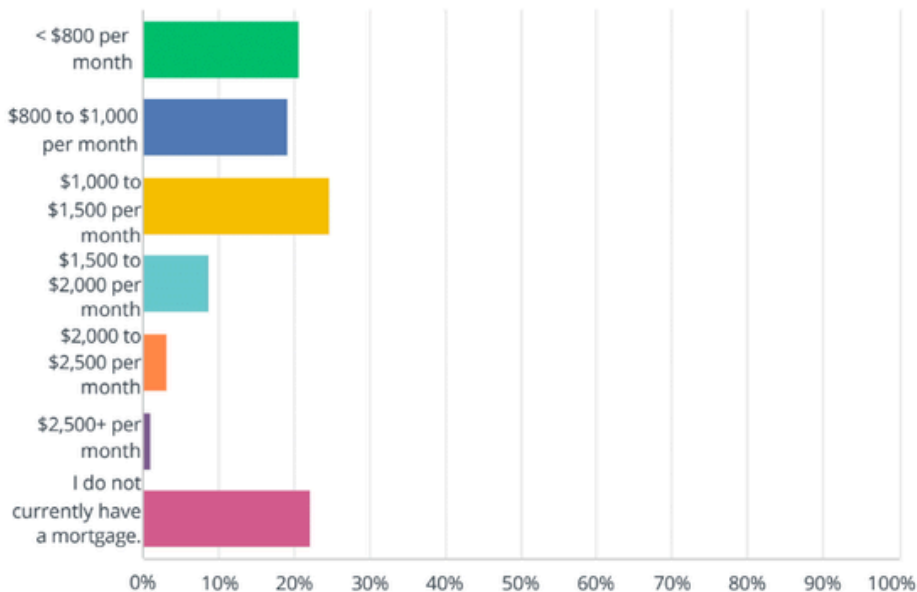
Q14 Please select which area of Wayne County you would prefer to move:



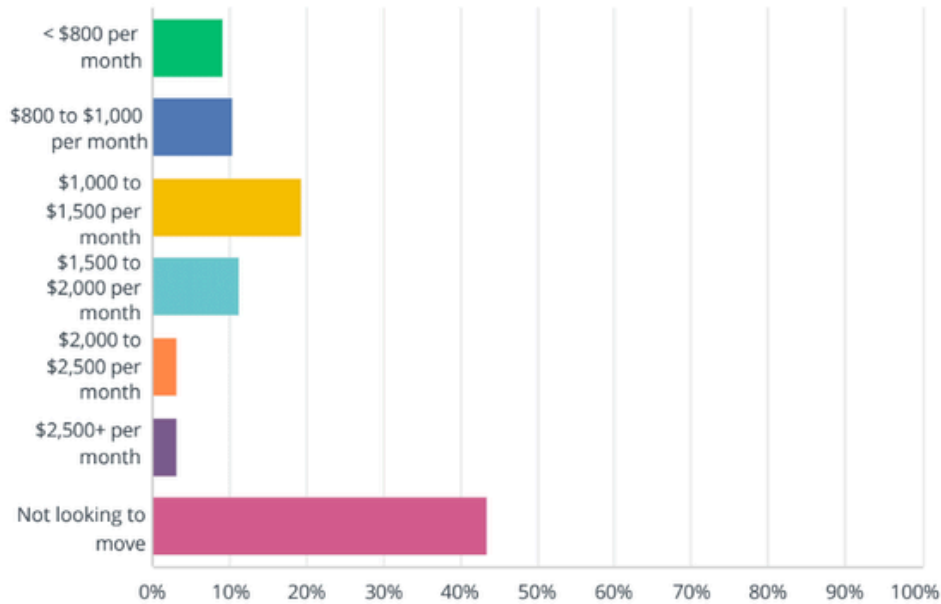
Q15 If you had the option to live in a neighborhood development with common amenities, how much would you be willing to pay in Homeowners Association (HOA) dues, assuming appropriately valued amenities?



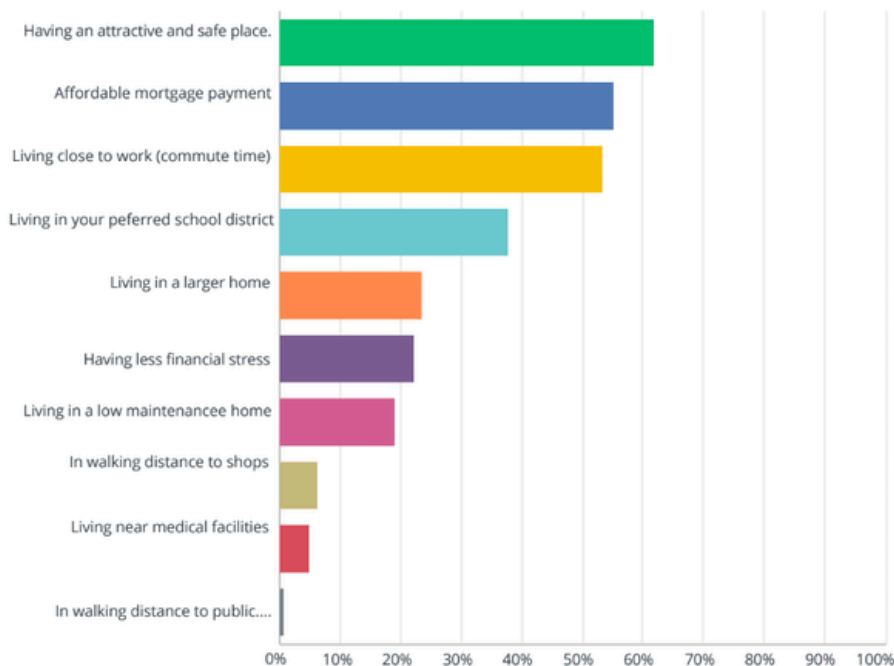
Q16 Where does your current monthly mortgage payment fall? (excluding insurance and property taxes)



Q17 If looking to move, what is the maximum monthly mortgage payment you can afford? (excluding insurance and property taxes)



Q18 Which of the options below drove your decision to purchase your current home? (select all that apply)

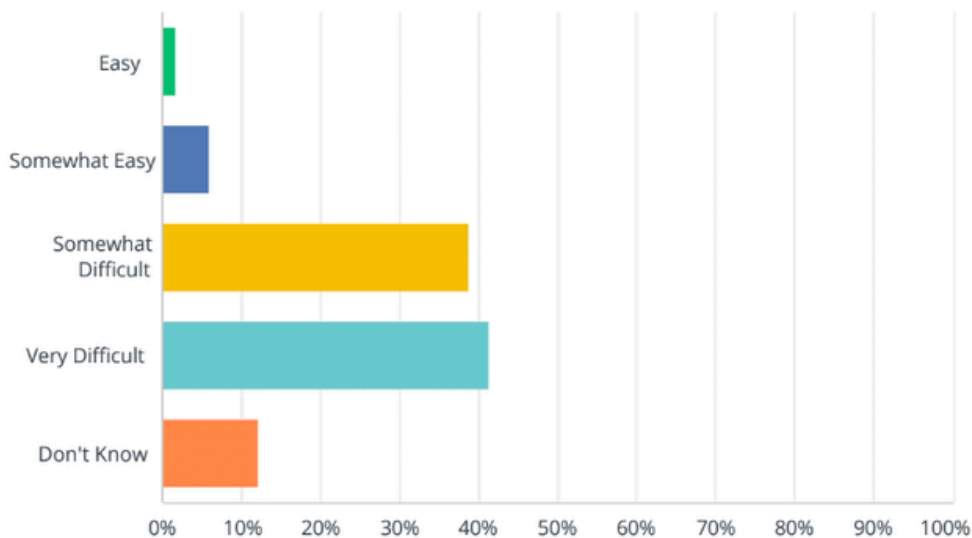


Q19 What other purchasing decisions influenced your decision to purchase your current home? (Examples: large lot, public water and sewer, sidewalks, condominium development, open space, recreational opportunities, quiet, well-built, and good internet access)

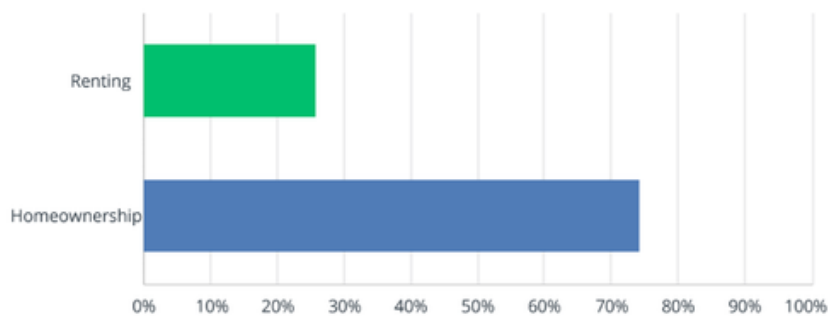
Top 3 Answers:

- Quiet
- Large Lot
- Sidewalks

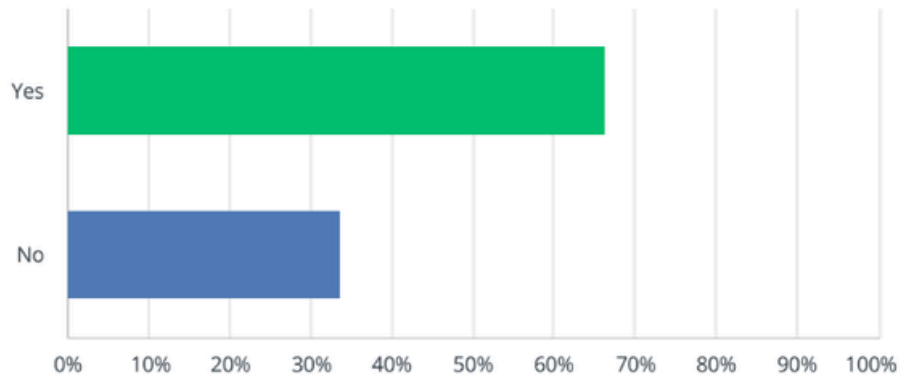
Q20 How would you describe the ability to secure any type of housing (rental or single-family) in Wayne County today?



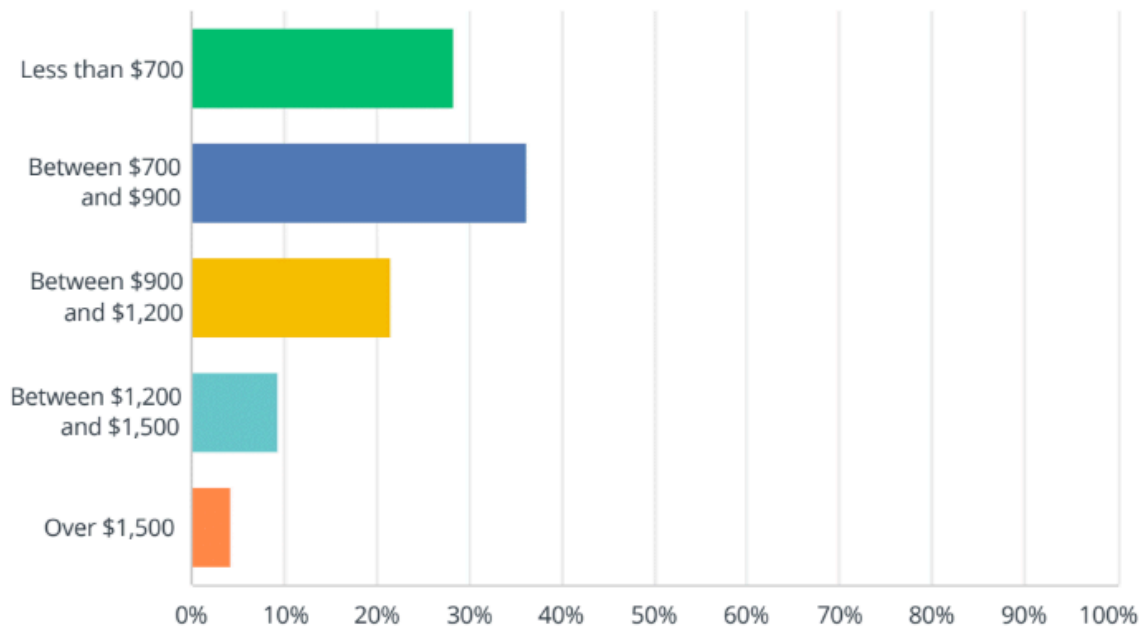
Q21 As a lifestyle choice do you prefer homeownership or renting?



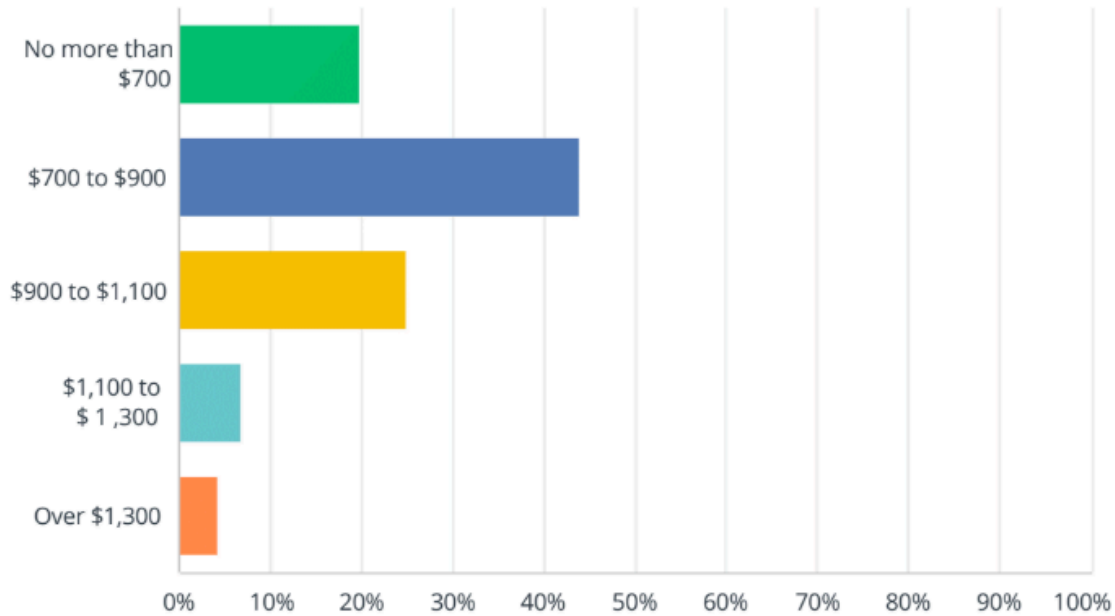
Q22 Do you plan to buy a home in the next two years and stop renting?



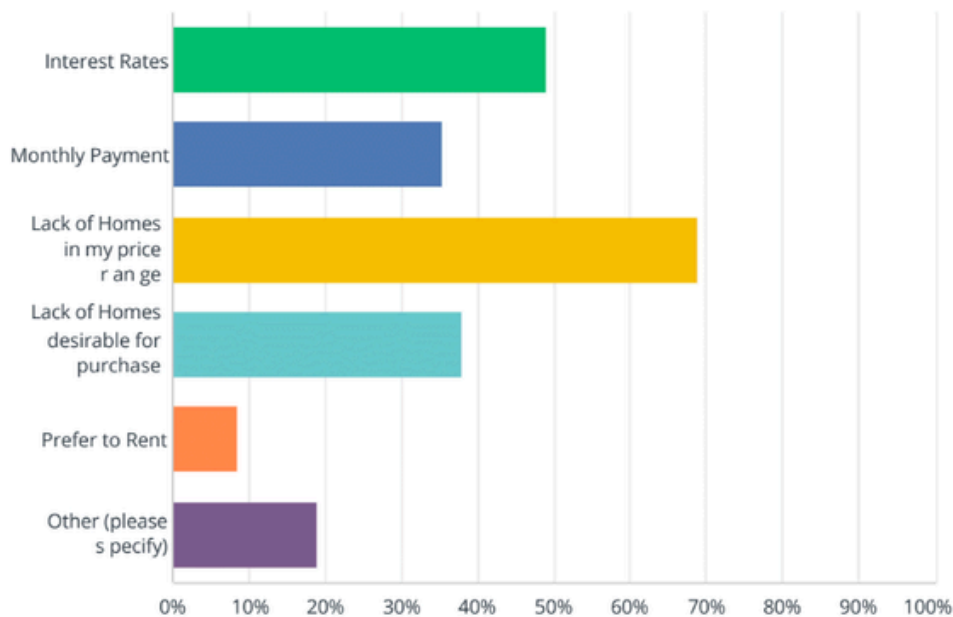
Q23 What do you currently pay in rent?



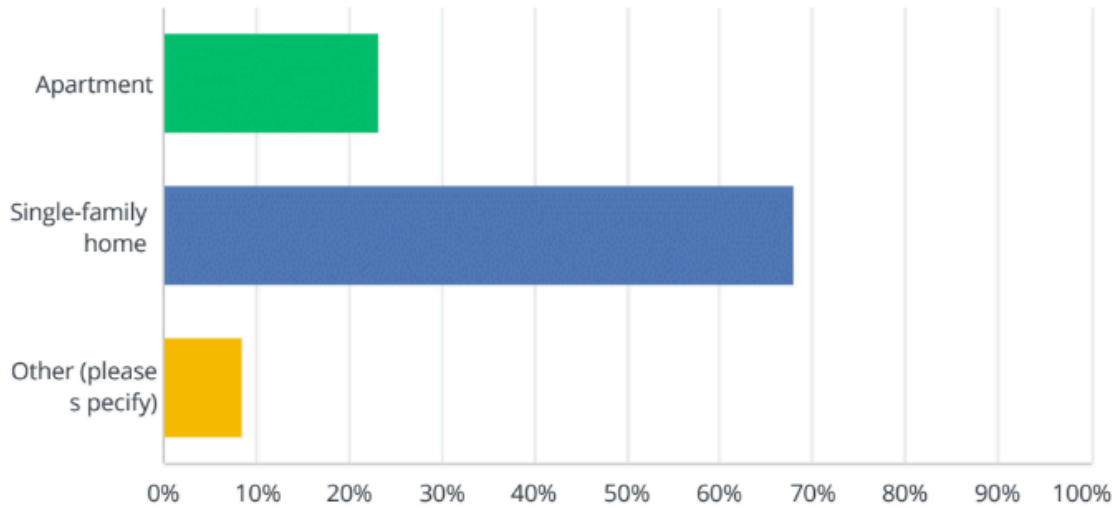
Q24 How much are you willing to pay each month for rent?



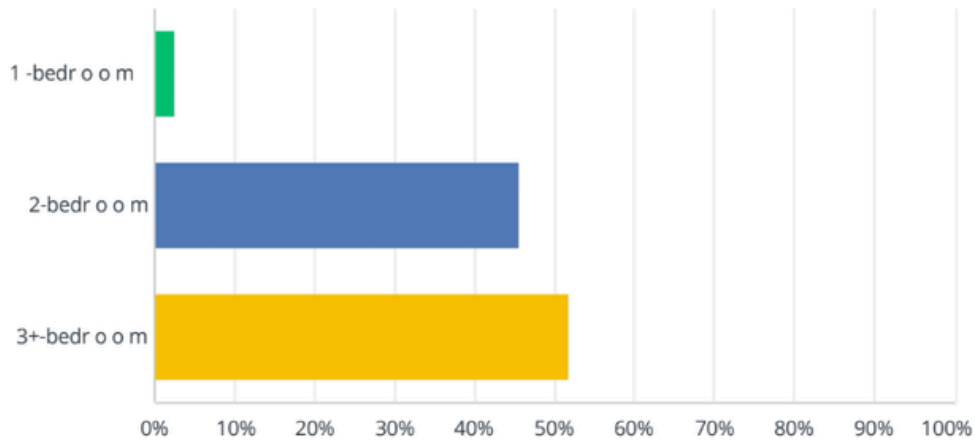
Q25 What prevents you from owning a home in Wayne County today? (select all that apply)



Q26 Which do you prefer to rent, or are currently renting?



Q27 If you were looking for a change, what size rental would you prefer?

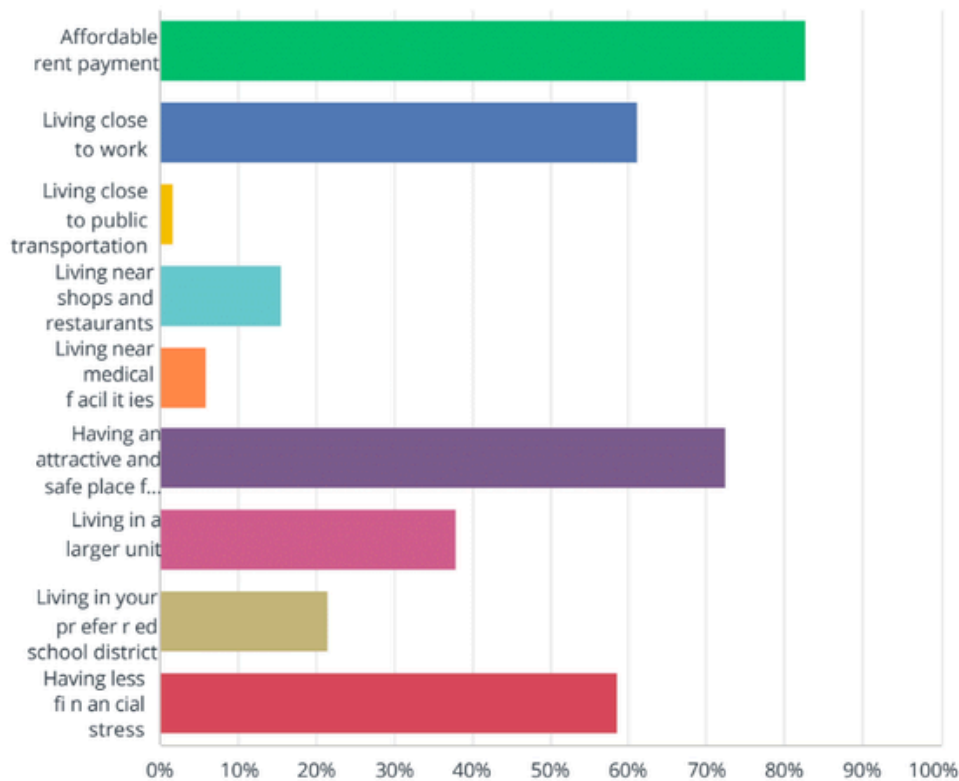


Q28 What amenities are important to your rental decision-making process?
(Examples: privacy, fenced yard, and close to services)

Top 3 Answers:

- Privacy
- Fast internet
- Fenced Yard

Q29 If you are intending to move to another rental property, what features will drive your decision-making for a new location? Select all that apply.

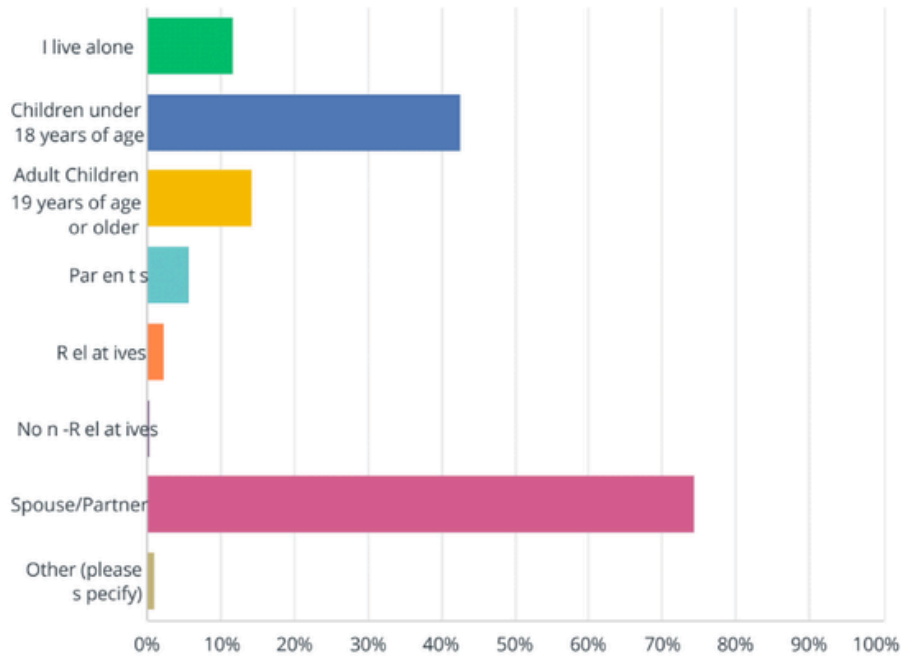


Q30 What other features will drive your decision-making for a new rental location? (Example: quiet, private deck or yard, country setting)

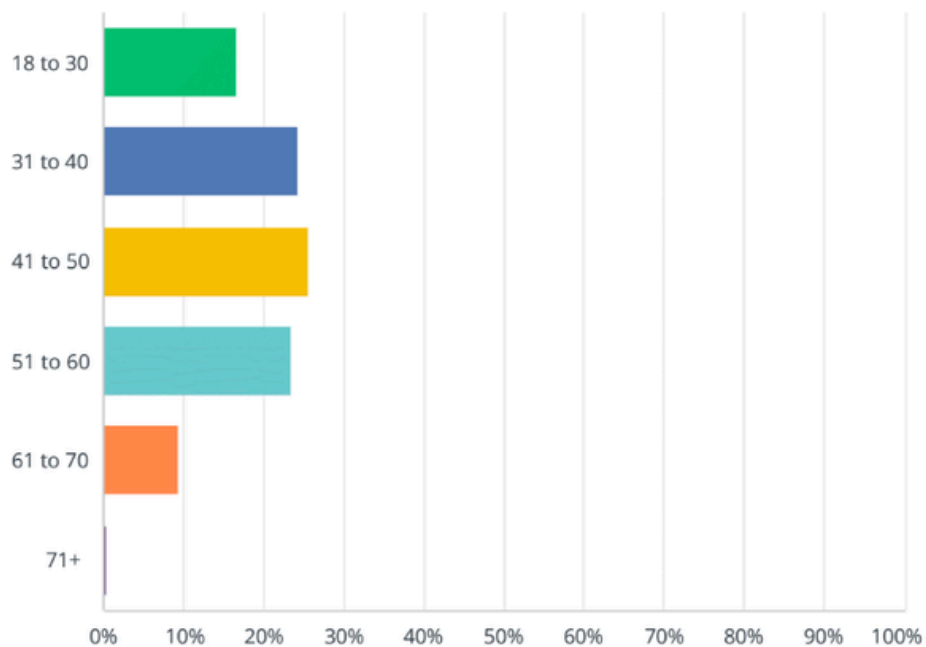
Top 3 Answers:

- Large Yard
- Country Setting
- Garage

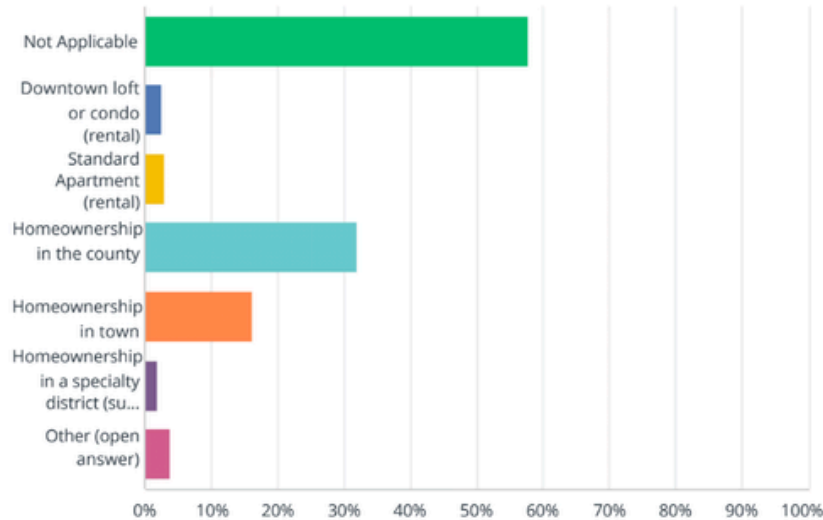
Q31 Which of the following best describes the types of people that live in your household? (select all that apply)



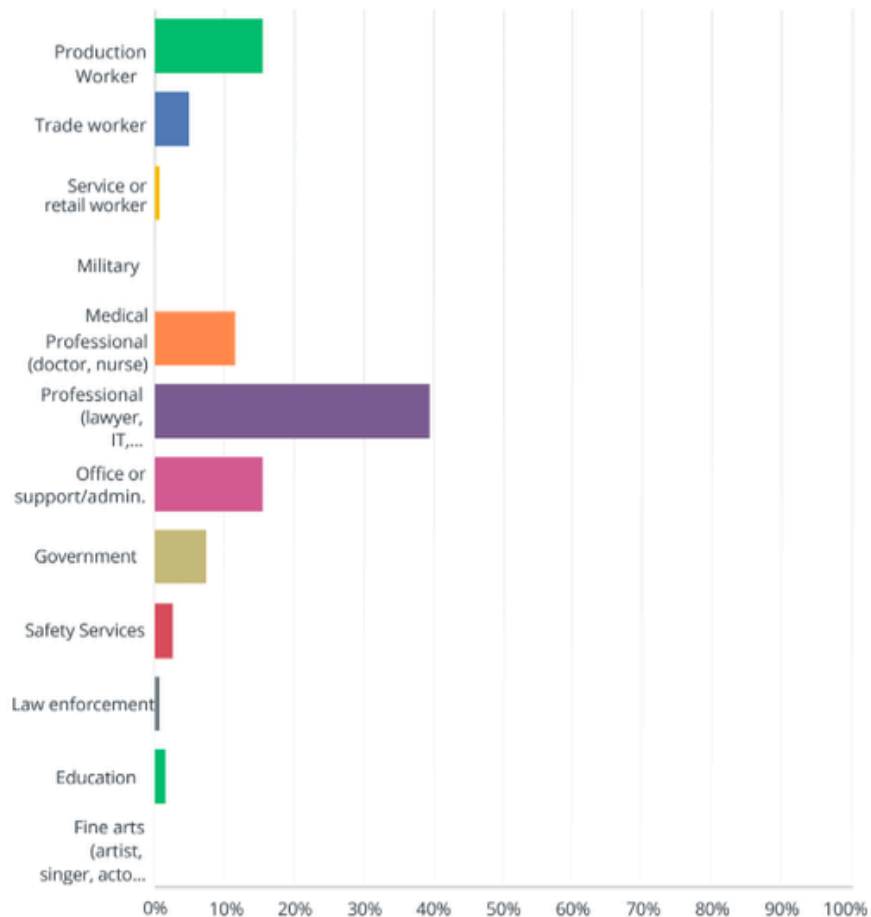
Q32 What is your age?



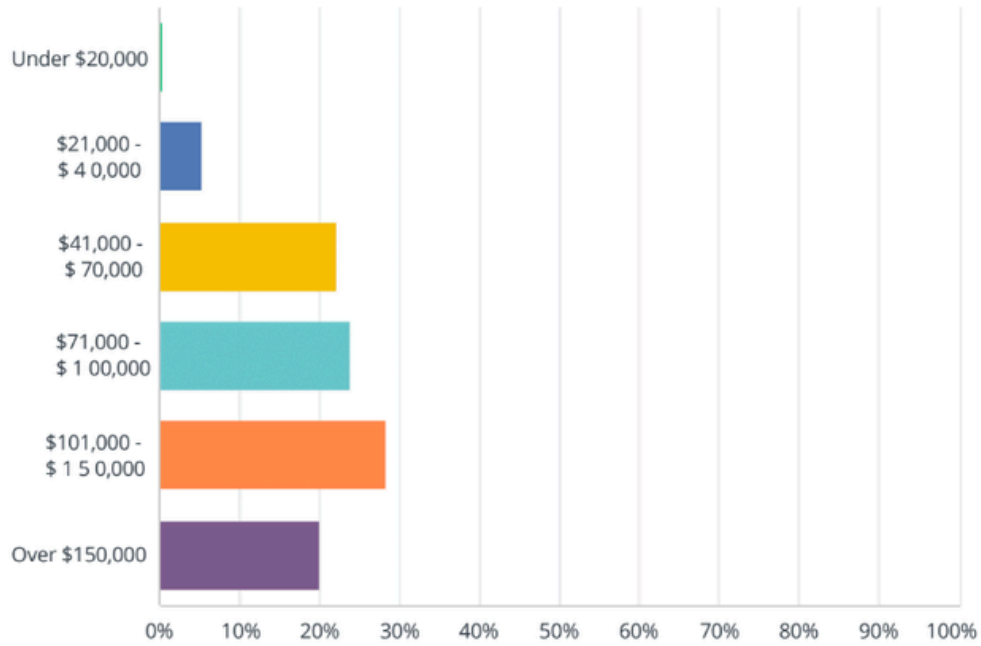
Q33 If you consider yourself a Young Professional (under 40 years of age), what type of living situation would be ideal for you in Wayne County? (Select all that apply)



Q34 How would you describe the work you do?



Q35 For statistical purposes only, what was your total household income for 2023?

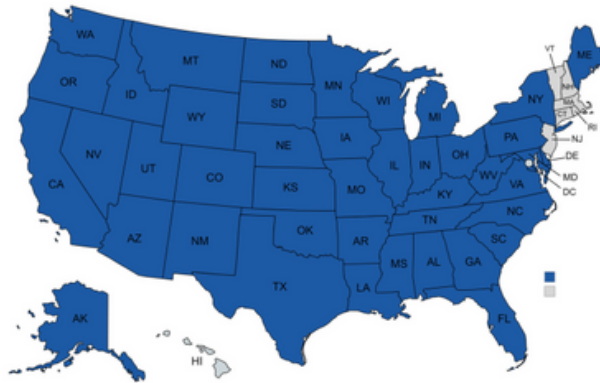


Who Is Next Move Group?

Next Move Group is an economic development consulting firm which has serviced 800+ customers since 2014.

Nationwide Clients:

We Have Serviced Clients From All States In Blue Since 2014



Next Move Group is a site selection and economic development firm that has serviced over 800 customers from Kennebec, Maine; to Kennewick, Washington; and all parts in between. Our team includes a graduate of the Goldman Sachs 10,000 Small Businesses Accelerator Program, a residential marketing professional, and a staff member with an urban planning Master's degree.

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