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Wayne County Housing Needs Assessment & Market Analysis

June 2023

Foreword

Housing has become a pervasive topic across all sectors of government and business intersecting with economic development, workforce development, affordable housing, senior housing, social services, resiliency, real estate development, and others. Home owners, renters, buyers, service providers, government leaders, and economists look at housing and the real estate market from different, often conflicting perspectives.

Local leaders are often asked to bring solutions to these issues, which can vary from municipality, and often cross municipal boundaries with varying market characteristics across the County. Analysis and utilization of local, regional, and state market data can help local leaders make informed decisions on how to address housing, and how to affect the change in their communities they are interested in promoting. Preservation of rural character, economic development, and housing development can often present several different ideologies, but communities can accommodate the balance of these interests through analysis and planning.

This study is aimed collecting, summarizing, and assessing data and current market conditions to provide information and guidance to local leaders, developers, and other market participants to assist in planning for the future and guiding resources to addressing market conditions and bringing development to areas where it is needed.

A wide variety of resources are available to municipalities, developers, and market players to address these issues. It is my hope that this study can help provide direction by helping define current conditions and opportunities for Wayne County Communities.



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About this Study

In 2022 and 2023, Wayne County engaged MRB Group to assist in the development of a countywide Housing Needs Assessment and Market Analysis. The intention of this study is to help better understand the current housing stock and market, identify current and future gaps, and develop actionable strategies to address housing gaps and needs in the County.

This Housing Needs Assessment and Market Analysis was developed to help housing providers, municipalities, Wayne County agencies, and not-for-profit organizations identify solutions and prepare for future development that will ultimately meet the community's residents. It summarizes existing housing initiatives in the County, provides demographic and economic data, provides data-rich information on the current housing stock and real estate market, and offers strategies and recommendations for Wayne County and its partners to encourage housing solutions and development projects that meet both market demand and community priorities. Recommendations from this study will be used to guide housing policy decisions, encourage public-private collaborations, and be an instrumental tool for leveraging future funding opportunities.

In addition to receiving guidance from the Project Steering Committee, MRB Group gained insights from a variety of stakeholders. This engagement included:

- Key stakeholder agency interviews
- Municipal leadership interviews
- Developer interviews
- Employer interviews

Project Steering Committee

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Table of Contents

Executive Summary 5

Chapter 1: Implementation Strategies 5

Chapter 2: Housing Needs Assessment..... 5

Chapter 3: Existing Conditions - Wayne County Plans, Initiatives, & Programs..... 5

Chapter 4: The Demographic Landscape..... 5

Chapter 5: Housing Market Snapshot 5

Chapter 6: Housing Inventory Overview 5

Chapter 7: Stakeholder Engagement Summary..... 5

Executive Summary

Wayne County and its partners envision a housing market that seamlessly meets the needs of all residents. Individuals and families have different housing needs and desires at different stages of life, from their first apartment to a senior townhome. Being able to accommodate individuals and families throughout this cycle requires a stock of diverse housing types and costs.

Wayne County currently has a housing stock that is both aging and misaligned with the market and community needs. Furthermore, different areas within the County are experiencing increasingly divergent housing trends, and thus are in some cases needing different types of housing interventions. Market trends in the western part of the County are becoming increasingly aligned with the Rochester MSA and workforce. This has led to an increasing demand for middle market housing, including new single-family homes and market rate apartments. Meanwhile, the northeastern part of the County has a larger proportion of seasonal and second homes mixed with low-income residents, and the southeastern area of the County is in need of programming to improve infrastructure and housing quality. However, there are also some generally consistent trends across the County.

Wayne County faces the following key housing needs:

- There is a prevalent desire for new and more diverse senior housing, including townhomes that would provide the opportunity to downsize and age in place. This would have the ancillary benefit of introducing their former, single family homes to the market.
- Homeless and housing vulnerable youth and families with children are underserved in the emergency, transitional, and affordable housing market.
- Residents need additional assistance toward improvements of older single-family homes, and need continued outreach to increase awareness of existing assistance.
- Municipalities need tools and technical assistance that would aid in considering zoning updates that would better serve communities in attracting and implementing the housing development they desire.
- Infrastructure, particularly water and sewer, is likely to be a primary barrier to large scale housing development.
- Some employers are relying more on contract, traveling, and co-op workers. These workers need quality, affordable rental options with flexible leasing terms, referred to in this report as “flexible term workforce rentals”. Some of these workers are not able to find housing in Wayne County and end up commuting from other counties instead.

The first chapter of this study provides implementation strategies and recommendations for Wayne County, its municipalities, and its other partners to address current and future housing needs. These strategies are based on a thorough analysis, outlined in the remaining chapters, of the existing housing stock and the needs of current and future residents, and grounded in an understanding of market conditions and community priorities. The strategies are organized into four overarching goal areas: 1) enhancing land management tools and resources to improve housing quality and diversity, 2) addressing housing needs for vulnerable populations, 3) addressing specialized workforce housing

needs, and 4) providing additional resources and infrastructure to support quality of life. That being said, not every strategy will be the right solution for every municipality in Wayne County. Local leaders will need to be engaged in moving forward the right strategies in their communities.



Chapter 1: Implementation Strategies



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Framework

The Action Plan Matrix that follows lays out steps that Wayne County, local municipalities, and key partners can take to improve and expand the housing stock in Wayne County. Lead organizations for each action are identified, but not committed, along with potential partners and resources. This matrix is designed to serve as a living document that can be updated and adapted by Wayne County as it makes additional strides in housing development. The matrix consists of four Goal Areas that were identified through data analysis, stakeholder input, and a review of existing conditions and resources. These goals are worded to reflect the desired end result, even if ambitious:

1. Land management tools and resources are in place to create and improve the quality of and access to housing for all residents
2. Vulnerable populations have access to appropriate housing and resources
3. Specialized workforce segments have access to quality housing that meets their needs
4. Residents of Wayne County have the resources and infrastructure for a great quality of life

This plan reflects the following trends and challenges that arose during the planning process:

- Additional, more diverse senior housing options would create benefits for residents and the housing market.
- New solutions for homeless and housing vulnerable youth and families are needed throughout the County.
- Expanded quantity and awareness of programming to support homeowners with maintenance, updates, and improvements would aid in enhancing housing quality and address challenges associated with older homes.
- Developers are seeking more streamlined permitting processes, so updated zoning and proactive planning would aid in attracting additional housing development.
- Infrastructure, particularly water and sewer, is likely to be a primary barrier to large scale housing development.
- Flexible term workforce rentals would benefit local employers who are increasingly utilizing temporary workers. New models for partnership and collaboration near these employers may help to improve workforce attraction and worker quality of life.

Various goals identify municipal leaders as the lead organization, however it is worth noting that not every action is going to be appropriate for every municipality given some of the distinct needs in different areas of the County. Each municipality should consider their own conditions, community needs, and desired housing outcomes to identify the actions that make the most sense within the context of their community. Furthermore, the Wayne County Planning Department is prepared to assist municipalities with various planning, zoning, and resource activities within this plan.

Acronyms & Definitions

While reviewing the Action Plan Matrix, the following acronyms and definitions may be useful.

Acronyms

- CDBG: Community Development Block Grants – typically administered through NY Homes & Community Renewal
- DEC: Department of Environmental Conservation
- DOS: Department of State
- DSS: Department of Social Services – specifically for Wayne County
- EDA: Economic Development Administration
- HCR: Homes and Community Renewal (a division of the Office of Community Renewal)
- HUD: Housing and Urban Development
- LMI: Low and Moderate Income
- OCFS: Office of Children and Family Services
- OCR: Office of Community Renewal
- RP or RPL: Real Property Law
- SBDC: Small Business Development Center – a program of the US Small Business Administration
- SONYMA: State of New York Mortgage Agency
- YIMBY: new HUD funding program - “Yes In My Back Yard” – to assist municipalities with zoning updates that allow for more diverse housing development

Definitions

Affordable Housing: Housing affordability is a function of both cost and income. Officially, government funding programs related to affordable housing rely on very specific definitions and thresholds, which are often calibrated to local or regional conditions. Unofficially, “affordable” is also sometimes used more generally to refer to housing options that are attainable for certain groups of people. Households are considered “cost burdened” if foundational shelter costs (rent, mortgage, utilities) exceed 30% of the household income.

ALICE populations: Asset Limited Income Constrained Employed - individuals and households that are working, but not making a living wage or enough to cover normal living expenses. Think “living pay check to pay check”.

Benefits Cliff: The threshold at which a household no longer qualifies for public assistance or other financial assistance. A small increase in income can disqualify a household for a greater amount of benefits, making it more difficult for the household to make ends meet.

Non-permanent housing unit types:

- **Short-Term Rentals:** housing units that are rented out for less than 30-day increments, such as AirBNB/VRBO vacation rentals. This would not include traditional hotel, motel, inn, or B&B rooms that are categorized under zoning as such.
- **Temporary Housing:** emergency housing provided to low-income and homeless individuals and families, generally for 30 days or less.
- **Flexible Term Workforce Housing:** units for temporary and contract workers that would generally have rental terms of greater than 30 days, in most instances 3 or more months. The population being served by these units need the flexibility to match their lease terms to their contracted employment and/or have the flexibility to terminate or extend their lease in accordance with their employment contracts. It would be ideal for these units to be fully furnished.

Manufactured Home: a factory-built housing unit that is transported to and placed on a site, as opposed to a stick-built home that is built on site. These units are built in compliance with the 1976 HUD Manufactured Home Construction and Safety Standards (the “HUD code”), which sets federal standards related design, materials, fire safety, mechanicals, etc. in the construction of manufactured homes. Depending on the foundation and structural details, these units could be relocated if necessary.

Mobile Home: a factory-built housing unit that is transported and placed on a site, but built prior to 1976. These units were not required to comply with the HUD code. Many of these units were built on wheels and could be fairly easily relocated.

Modular Home: Modular homes are also prefabricated off site, but are built to comply with the local building codes that apply to on-site, stick-built homes rather than the HUD code. Generally, they are placed on permanent foundations.

Action Plan Matrix

Goal 1: Land management tools and resources are in place to create and improve the quality of and access to housing for all residents		
Strategy 1.1: Identify development resources to address the aging housing stock.		
Action	Lead Organizations	Resources and Funding Sources
Continue to collect and analyze derelict property data to identify chronic and severe property maintenance issues.	Wayne County Planning	Existing staff time
Continue to pursue funding for housing rehabilitation programming.	Wayne County Planning and Local community organizations	PathStone/Rural Housing Opportunities Corporation, Finger Lakes Community Action, CDBG, NYS HOME, NYS Rural Area Revitalization Program, NY Main Street
Continue and expand collaboration with the Wayne County Regional Land Bank to address quality, safety, and blight issues and to package tax-delinquent homes and market to developers for low-cost single family product.	Wayne County Regional Land Bank	Land Bank funds, Restore NY, NY Forward and other NYS funding, Habitat for Humanity, PathStone, Sheen Housing, Brownfield Coalition
Facilitate financing and technical assistance to support renovations, weatherization, and upgrades to manufactured housing stock.	Owners and residents of mobile/manufactured home parks	Pathstone's Manufactured Home Cooperative Program, NYSEDA and Finger Lakes Community Action weatherization programs, NYS manufactured program, US HUD PRICE Act
If needed, update codes within the Towns and Village and provide enough capacity and training to implement the codes.	Municipal leaders	Finger Lakes Building Officers Association, State Training for Code Enforcement Officers
Develop, regularly update, and periodically disseminate publications outlining existing resources and programs to support homeowner and landlord repairs, improvements, and weatherization.	Wayne County Planning	Staff time, nonprofit partners, local foundations

Strategy 1.2: Provide an ample supply of housing types		
Action	Lead Organizations	Resources and Funding Sources
Identify sites for new single-family (ideally over 10 acres) and multi-family (ideally 1-5 acres) development and begin predevelopment work to ensure streamlined environmental review, permitting processes, and access to infrastructure. Consider zoning updates, infrastructure planning and engineering, and conducting archeological and environmental studies.	Municipal leaders	Wayne County Planning, NYS DEC, US EDA, NBRC, HUD YIMBY program, Rochester Home Builders Associations
Identify and improve residential development within the village and town centers with mixed use, infill and updating land use regulations.	Municipal leadership with Wayne County Planning	RP-485-a, NY Main Street program, Rural Area Revitalization Program, historical rehabilitation tax credits, NY Forward, Restore NY, DRI
Market sites in hamlets and downtown-adjacent areas for multifamily and townhome development.	Municipal leaders	Historical rehabilitation tax credits, Real Property Tax Law exemptions, potential IDA PILOTs, NYS HCR
Research and explore best practices for administering housing programs and resources countywide. Create a directory of partners and resources.	Wayne County Planning	staff time, Wayne County DSS, Wayne Partnership, NYS HCR, nonprofit partners, Wayne County Regional Land Bank
Develop information packages identifying available land, zoning, and available resources.	Municipal leadership with Wayne County Planning	Realtors, Rochester Home Builders Associations

Strategy 1.3: Create, facilitate, and promote pathways to homeownership		
Action	Lead Organizations	Resources and Funding Sources
Partner with lenders, local real estate professionals, and human services agencies to provide, package, and/or expand education, credit counseling, technical assistance, and promotion of financing resources available to homebuyers.	Wayne County Planning	NYS HCR SONYMA programs, United Way of Greater Rochester and the Finger Lakes, PathStone, Newark Housing Authority, Greater Rochester Association of Realtors, Consumer Credit Counseling Service of Rochester, lenders
Work with the Land Bank or create a Community Land Trust to implement an "affordable homeownership" program that makes a home permanently affordable by indexing and capping the sale price to LMI affordability standards.	Wayne County Regional Land Bank	NYS OCR, NY Forward, Restore NY
Partner with developer to construct a manufactured home community with the intention of converting to a resident-owned cooperative once all of the units are sold.	PathStone	
Work with partners to encourage first time homebuyers and workforce to purchase homes in Wayne County.	Wayne County Planning	PathStone, Newark Housing Authority, local employers, lenders

Strategy 1.4: Update comprehensive plans, zoning, tax laws and policies to address housing development		
Action	Lead Organizations	Resources and Funding Sources
Educational seminars and workshops for municipal leaders and staff regarding relevant funding opportunities.	Wayne County Planning	State and Federal agencies, foundations, community nonprofits
Promote and adopt relevant Real Property Tax Law 485a and 457 exemptions that incentivize and induce the development of desired housing products.	Wayne County Planning to coordinate and inform; municipal leadership to adopt; school districts to participate where applicable	Advisement by Wayne County Real Property Tax Services and Treasurers Office
Enable municipalities to update Comprehensive Plan and address all housing types. Encourage municipalities to adopt zoning regulations that allow for multi-family, mixed-use, accessory dwelling units, increased density, and/or decreased parking requirements (as applicable).	Municipal leadership	NYS OCR, NYS DOS, CDBG, technical assistance from Wayne County Planning
Ensure that zoning and development regulations are reflective of municipal Comprehensive Plan and community housing goals.	Municipal planning and zoning boards	NYS DOS
Research best practices for mobile/manufactured home, flexible term workforce rental, and short-term rental review process.	Wayne County Planning and Municipal leadership	NYS OCR, NYS DOS, CDBG, technical assistance from Wayne County Planning
Provide training or guiding documents to towns and villages regarding zoning and regulations for manufactured housing, as well as tools to encourage and facilitate the creation of Manufactured Home Cooperatives (MHCs).	Municipal governments	Wayne County Planning, NYS HCR Manufactured Home Cooperative Fund
Review enforcement of predatory rent-to-own agreements and State limits on rent increases for mobile/manufactured home parks, and explore opportunities to expand advocacy and technical assistance for low-income families prior to entering these agreements.	Wayne CAP	Finger Lakes Community Action, Legal Assistance of Western NY
Review Wayne County Industrial Development Agency's UTEP by identifying reuse of existing buildings for housing.	Wayne County IDA	

Goal 2: Vulnerable populations have access to appropriate housing and supports**Strategy 2.1: Expand programming and opportunity for the housing insecure and homeless, particularly families and youth**

Action	Lead Organizations	Resources and Funding Sources
Facilitate discussions with multi-family property owners to identify apartments for homeless families with children.	Wayne County Department of Social Services	Wayne Partnership, Finger Lakes Landlord Association
Continue to communicate clear definitions around affordable, subsidized, and supportive housing.	Wayne County Planning	Existing staff time, Wayne Partnership, Finger Lakes Community Action
Identify larger affordable units for families.	Newark Housing Authority, DSS, Finger Lakes Community Action	NYS OMH Empire State Supportive Housing Initiative (ESSHI), NYS OTDA Homeless Housing and Assistance Program (HHAP), NYS HCR ARPA HOME or CDBG, Section 8 Housing, Finger Lakes Landlord Association
Learn from and/or collaborate with the Center For Youth in Monroe County to identify and implement appropriate housing strategies and programming for homeless youth in Wayne County.	Finger Lakes Community Action	Consortium Community Schools, Wayne Partnership

Strategy 2.2: Facilitate development of additional affordable housing products

Action	Lead Organizations	Resources and Funding Sources
Continue and identify future funding for the Housing Rehab program for affordable rental housing units.	Wayne County Planning	Enterprise, Pathstone, NYS OCR
Identify future funding for homeowner rehab programs for LMI households.	Wayne County Planning	Enterprise, Pathstone, NYS OCR
Educate the community about supportive, affordable, low-income, and attainable housing. Leverage information about the benefits cliff and ALICE populations.	Wayne County Planning	Existing staff time, United Way of Greater Rochester and the Finger Lakes, Finger Lakes Community Action

Strategy 2.3: Develop additional housing products for seniors		
Action	Lead Organizations	Resources and Funding Sources
Identify specific senior housing developments, aging in place resources, and locations that will assist with the senior population staying in the County.	Wayne County Planning	Sheen Housing, PathStone
Explore co-living and other alternative housing models that reduce rent and maintenance responsibilities, while increasing socialization, health, and safety for seniors.	Wayne County Planning; not-for-profit developers	Empire State Supportive Housing Initiative, HUD Assisted Living Conversion Program
Partner with local organizations to develop streamlined programs for retro-fitting existing housing to support aging in place, as well as developing additional rental units for seniors.	Wayne County Planning	Rochester Homebuilders Association, Sheen Housing, PathStone, Finger Lakes Community Action , FLACRA, Empire State Supportive Housing Initiative, HUD Assisted Living Conversion Program
Work with municipalities seeking senior housing options to ensure zoning, regulations, and infrastructure are in place to support townhome, patio homes, and progressive housing development.	Wayne County Planning	Municipal leadership, US HUD YIMBY, NYS DEC

Goal 3: Specialized workforce segments have access to quality housing that meets their needs**Strategy 3.1: Create flexible term workforce rental units for contract, co-op, and other temporary workers**

Action	Lead Organizations	Resources and Funding Sources
Identify employers across industries that utilize temporary labor, starting with healthcare and manufacturing, to target geographies for flexible term housing initiatives.	Wayne County Planning	Local economic developers, business associations
Review, research, identify, and implement locally appropriate solutions for flexible term workforce rentals, short-term rentals, and accessory dwelling units based on the specific needs of the municipality for workforce and/or recreational housing.	Municipal leadership	US HUD YIMBY, Wayne County Planning
Encourage and/or incentivize the development of small, reasonably priced units. Work with local home/property owners in areas of smaller demand, and developers in areas of greater demand.	Municipal leadership	NYS HCR Plus 1 AUD Program
Update and replicate temporary housing models previously used, partnering employers with local landlords.	Wayne County Housing Consortium	Finger Lakes Landlord Association

Strategy 3.2: Enhance housing stability and quality for farmworkers

Action	Lead Organizations	Resources and Funding Sources
Convene a Farmworkers and New Americans Working Group to advocate for and compile resources to assist year-round farmworkers and other migrant populations in accessing housing, including rentals and homeownership opportunities. This could include public education about Federal Fair Housing laws, translation services, guidance in getting an ITIN, and setting up structures to help grow social capital through banking relationships and other services.	Wayne County Housing Consortium	Wayne CAP, PathStone, Wayne Partnership, Consumer Credit Counseling Service of Rochester, lenders
Support organizations in identifying farmworker housing needs in the County.	PathStone	Farm Bureau, NYS HCR Farmer Worker Housing Program, Farmworker Safety Housing Grant, Finger Lakes Community Action, Finger Lakes Coalition of Farmworker Serving
Support repair and replacement programs for farmworker housing.	Wayne County Planning	NYS HCR Farmer Worker Housing Program, Farmworker Safety Housing Grant, PathStone, Farm Credit East

Goal 4: Residents of Wayne County have the resources and infrastructure for a great quality of life**Strategy 4.1: Expand transportation access and availability**

Action	Lead Organizations	Resources and Funding Sources
Assess RTS routes and schedules to determine if they align with employment clusters, services, and common shifts.	RTS	
Explore alternative and on-demand transportation options to fill gaps in the public transit system.	RTS	

Strategy 4.2: Expand childcare availability

Action	Lead Organizations	Resources and Funding Sources
Work with existing and potential childcare providers on training, planning and capacity building to enable the expansion of available childcare slots.	Child Care Council	NYS OCFS Division of Child Care Services, QUALITYstarsNY, SBDC
Support the development of additional childcare programs and facilities in all areas of the county, understanding that centers need to be accessible to workforce and in proximity to existing infrastructure. Facilitate collaboration between employers, parents, and providers to identify innovative solutions.	Child Care Council	NYS OCFS Division of Child Care Services, QUALITYstarsNY, SBDC

Strategy 4.3: Continue broadband development to ensure all residents have affordable access to high speed internet

Action	Lead Organizations	Resources and Funding Sources
Leverage existing broadband development activity to promote and encourage additional buildout by multiple providers to facilitate competition, quality, and affordability.	Wayne County Planning	US NTIA
Continue to upgrade internet service and technology at current and potential public access points, such as libraries, community centers, and educational institutions.	Libraries, community centers and educational institutions	

Strategy 4.4: Create supports for individuals to thrive and become more resilient, despite not being part of a defined "vulnerable" population		
Action	Lead Organizations	Resources and Funding Sources
Identify, define, and quantify populations in need of social and human services supports that are not included within the eligibility for existing social services programming.	Wayne Partnership	community nonprofits, FLACRA, Wayne County DSS, Newark-Wayne Community Hospital
Improve communications regarding the availability and locations of emergency shelters prior to and during disaster situations to enhance community resiliency and safety. This could entail actions like designating information sites, listing typical shelters on the EMO website for preparedness, or community outreach/marketing tools.	Wayne County Emergency Management	Red Cross
Ensure that homeless and housing insecure students are able to remain in the same school district by implementing more consistent transportation support, per the requirements of McKinney Vento.	School districts, Family Promise	Consortium Community Schools, Wayne Partnership Community Schools Sub-Committee
Implement System of Care approach to support students who must change districts and ensure they have access to any supplemental services and wraparound supports they may need.	School districts	Consortium Community Schools, Wayne Partnership Community Schools Sub-Committee



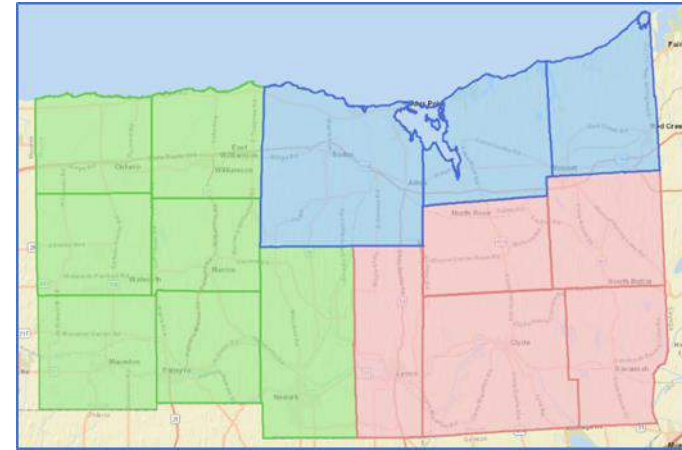
Chapter 2: Housing Needs Assessment

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The strategies outlined in Chapter 1 hinge upon the specific characteristics and needs of the County and its component communities. While current demographic, housing inventory, and housing market characteristics, as well as existing plans and initiatives, will be explored more thoroughly in later chapters, it is critical to understand current and projected gaps in the housing landscape. Initial data analysis illuminated three market areas within the County, shown on the map to the right. Considering gaps at not just the County level, but also at the level of these market areas, will help individual communities understand which strategies are of the highest priority in the local context.



Current Conditions

Cost Burdened Households

The table below provides an overview of households that are cost burdened. A household is considered cost burdened if its housing expenditures are more than 30% of the household income. This is further broken down by renter and owner-occupied households. Wayne County has a lower proportion of cost burdened households than the State or the Finger Lakes Region, and yet 43% of renter occupied households in the County are cost burdened. In the Southeastern market area, over 46% of renter households are cost burdened. Over 20% of owner-occupied households in the County are cost burdened (above the regional proportion of 18.8%), with the highest proportion in the Western market area where the data indicates demand is the highest. Despite outperforming surrounding areas, there is still room to improve quality of life through housing affordability and availability efforts.

Cost Burdened Households

	Wayne County	Western	Southeastern	Northeastern	NYS	Finger Lakes
Total occupied households	37,771	25,835	5,755	6,181	7,530,150	499,016
Cost burdened households (all occupied)	9,504	6,653	1,427	1,424	2,774,969	139,950
Percent of occupied households that are cost burdened	25.2%	25.8%	24.8%	23.0%	36.9%	28.0%
Total owner-occupied households	29,500	20,010	4,405	5,085	4,095,636	339,232
Cost burdened owner-occupied households	5,947	4,202	802	943	1,099,006	63,838
Percent of owner-occupied households that are cost burdened	20.2%	21.0%	18.2%	18.5%	26.8%	18.8%
Total renter occupied households	8,271	5,825	1,350	1,096	3,434,514	3,594,298
Cost burdened renter occupied households	3,557	2,451	625	481	1,675,963	1,752,075
Percent of renter occupied households that are cost burdened	43.0%	42.1%	46.3%	43.9%	48.8%	48.7%

Source: American Community Survey 5-year Estimates, MRB Group

Underhoused Young Adults and Seniors

Not every household looks the same. It is expected that some individuals will be living alone or with a spouse or partner, while others will be living with roommates, friends, or other family. Underhoused individuals are those who would be expected to be living alone or with a spouse/partner, but instead are living with others. To identify underhoused populations, this analysis compares the proportion of young adults (aged 18-34) and seniors (aged 65+) living with others that are not a spouse/partner in Wayne County and its market areas to the proportions for the Finger Lakes Region. By applying the regional proportion to Wayne County populations, we then estimate the number of individuals in these age groups expected to be living with others and compare that against the actual number of individuals. This analysis ultimately shows the number of additional housing units that would be needed to allow each underhoused individual to live on their own. Note that not all underhoused individuals would live on their own, some would instead move into a separate unit with a spouse or partner (for example, an elderly couple moving out of their child's house to live on their own would only need 1 unit, not 2).

The table below shows the analysis for young adults. Overall, fewer young adults in the County are living with others than would be expected based on the regional proportion. However, the Northeastern market area does show an estimated 87 underhoused young adults. Based on current trends for the age group in the County, filling this gap would require up to 54 single family units and 32 rental units. However, it is worth noting that young adults are more likely to be homeowners in Wayne County than in New York State or the Finger Lakes Region. Regionally, 37.7% of householder young adults are homeowners, compared to nearly 60% in Wayne County. This could indicate that there are limited rental options for young adults. This is particularly evident in the Northeastern market area where 62.6% of young adult householders are homeowners.

Underhoused Young Adults

	Wayne County	Western	Southeastern	Northeastern	NYS	Finger Lakes
Total Population aged 18 and over in households	70,220	47,743	11,239	11,238	15,344,952	921,772
Individuals aged 18-34 in households	16,623	11,656	3,014	1,953	4,411,912	246,393
Percent of total that is aged 18-34	23.7%	24.4%	26.8%	17.4%	28.8%	26.7%
Individuals aged 18-34 that are living with others (non-spouse/partner)	8,264	5,631	1,516	1,117	2,842,473	129,976
Percent of individuals aged 18-34 living with a non-spouse/partner	49.7%	48.3%	50.3%	57.2%	64.4%	52.8%
Individuals 18-34 expected to be living with others based on regional average	8,769	6,149	1,590	1,030	n/a	n/a
Individuals 18-34 that are underhoused (difference between actual and expected)	(505)	(518)	(74)	87	n/a	n/a
Percent of householders under 35 that are homeowners	59.1%	59.7%	53.6%	62.6%	25.6%	37.7%
Percent of householders under 35 that are renters	40.9%	40.3%	46.4%	37.4%	74.4%	62.3%
Needed single family units	n/a	n/a	n/a	54	n/a	n/a
Needed rental units	n/a	n/a	n/a	32	n/a	n/a

Source: American Community Survey 5-year Estimates, MRB Group

Similarly, generally Seniors in Wayne County are less likely to live with others than at the Regional level. However, the analysis does estimate 333 underhoused seniors in the Southeastern market area specifically. Based on current County trends, up to an additional 268 single family units and 65 rental units would be needed to fill this gap. In every area of the County, seniors are more likely to own their homes than the Regional proportion. This is especially distinct in the Northeastern area, where 90.3% of seniors are homeowners compared to 77.5% regionally. This high concentration of home ownership could indicate a need for additional housing types for seniors throughout the County.

Underhoused Seniors

	Wayne County	Western	Southeastern	Northeastern	NYS	Finger Lakes
Individuals aged 65+ in households	16,664	11,063	2,445	3,156	3,217,291	211,342
Percent of total that is aged 65+	23.7%	23.2%	21.8%	28.1%	21.0%	22.9%
Individuals aged 65+ living with others (non-spouse/partner)	1,849	1,164	627	197	682,869	25,417
Percent of individuals aged 65+ living with a non-spouse/partner	11.1%	10.5%	25.6%	6.2%	21.2%	12.0%
Individuals 65+ expected to be living with others based on regional average	2,004	1,330	294	380	n/a	n/a
Individuals 65+ that are underhoused (difference between actual and expected)	(155)	(166)	333	(183)	n/a	n/a
Percent of householders over 65 that are homeowners	81.7%	79.6%	80.4%	90.3%	65.7%	77.5%
Percent of householders over 65 that are renters	18.3%	20.4%	19.6%	9.7%	34.3%	22.5%
Needed single family units	n/a	n/a	268	n/a	n/a	n/a
Needed rental units	n/a	n/a	65	n/a	n/a	n/a

Source: American Community Survey 5-year Estimates, MRB Group

Substandard & Obsolete Housing

Stakeholder interviews and Wayne County's Derelict Property Strategy indicated that some areas of Wayne County may struggle with housing quality and maintenance issues. The County's Derelict Property Strategy Update identified at least 1,361 derelict properties throughout Wayne County. This includes properties that may be: unattractive and run-down but otherwise safe and economically contributing; vacant, uninhabitable and pose a threat to public health and safety; stuck in foreclosure (zombie) or are bank owned properties; in County tax foreclosure; and/or privately-owned and on roll section 8 (tax-exempt).¹ In addition, we analyzed data from the American Community Survey to identify the number of properties that are functionally obsolete or substandard. 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

¹ Source: Derelict Property Strategy, Wayne County. January 2019. Developed by LaBella.
Wayne County Housing Needs Assessment & Market Analysis

to be substandard. These figures are provided in the tables on the next page. Note that there is likely overlap among these three categories of units (derelict, substandard, and obsolete), so they are not added together to avoid duplication.

Obsolete, Substandard and Derelict Housing Units

	Wayne County	Western	Southeastern	Northeastern	NYS	Finger Lakes
Total occupied housing units	37,771	25,835	5,755	6,181	7,530,150	499,016
Housing units built prior to 1939	11,410	6,386	4,281	2,340	2,309,066	138,195
Housing units considered functionally obsolete (3% of those built before 1939)	342	192	128	70	69,272	4,146
Units without complete plumbing	296	60	231	5	28,193	1,837
Units without complete kitchen facilities	421	111	215	56	56,543	3,785
Minimum number of substandard units	421	171	231	56	56,543	3,785
Derelict Properties (2020)	1,361	676	377	308		

Source: American Community Survey 5-year Estimates, MRB Group, Wayne County Derelict Property Strategy Update

The Southeastern market area has the highest concentration of these types of properties, and as such should consider focusing on efforts that address housing quality.

Proportion of Obsolete, Substandard and Derelict Housing Units

	Wayne County	Western	Southeastern	Northeastern	NYS	Finger Lakes
% of total units that are obsolete	0.9%	0.7%	2.2%	1.1%	0.9%	0.8%
% of total units that are substandard	1.1%	0.7%	4.0%	0.9%	0.8%	0.8%
% of total units that are derelict	3.6%	2.6%	6.6%	5.0%		

Source: MRB Group

Future Needs

In addition to current housing gaps and needs, we considered projected demographic information and what types of housing might be needed to address housing for different populations.

The County and each of the component market areas are projected to lose population over the next five years. However, over all it is anticipated that household size will also decline, and thus the number of households will stay relatively stable throughout the County.

Population & Household Projections

		Population	Family Population	Households	Avg. Household Size
Wayne County	2022	89,951	71,786	37,138	2.38
	2027	88,711	70,559	37,385	2.34
	Change	(1,240) -1.4%	(1,227) -1.7%	247 0.7%	(0.04) -1.7%
Western	2022	60,704	49,079	25,361	2.36
	2027	59,819	48,210	25,393	2.32
	Change	(885) -1.5%	(869) -1.8%	32 0.1%	(0.04) -1.7%
Southeastern	2022	15,665	12,277	6,178	2.51
	2027	15,533	12,129	6,216	2.47
	Change	(132) -0.8%	(148) -1.2%	38 0.6%	(0.04) -1.6%
Northeastern	2022	13,582	10,430	5,779	2.31
	2027	13,359	10,220	5,776	2.28
	Change	(223) -1.6%	(210) -2.0%	(3) -0.1%	(0.03) -1.3%
NYS	2022	20,154,573	15,302,850	7,717,376	2.53
	2027	19,778,809	14,977,777	7,623,810	2.51
	Change	(375,764) -1.9%	(325,073) -2.1%	(93,566) -1.2%	(0.02) -0.8%
Finger Lakes	2022	1,212,159	901,248	503,247	2.31
	2027	1,199,259	887,920	503,120	2.29
	Change	(12,900) -1.1%	(13,328) -1.5%	(127) 0.0%	(0.02) -0.9%

Source: Esri, MRB Group

While the number of households are projected to stay stable, there are some anticipated shifts in the population when it comes to age groups. Overall, the County's population is aging. By 2027, it is anticipated that there will be nearly 2,500 additional seniors in the County. By default, this means that there will be fewer individuals within younger age cohorts. This further suggests a need to expand senior housing options. Assuming current trends among seniors in Wayne County, this additional senior population will demand 1,317 single family units and 295 rental units (see chart below for market areas). However, not all of this will be new demand, as many of these future seniors are likely already in homes that they will continue to occupy.

However, as noted above, Wayne County's seniors are more likely to own homes than seniors in the surrounding Finger Lakes Region. Stakeholder interviews also indicated that many seniors would like to age in the community, but not in their current homes. These factors again indicate a need for a greater variety of senior housing options.

Age Cohort Projections

		Child Population (under 18)		Young Adult Population (18-34)		Remainder Working-Age Population (35-64)		Senior Population (65+)	
Wayne County	2022	18,228		17,359		36,553		17,811	
	2027	18,033		15,764		34,659		20,255	
	Change	(195)	-1.1%	(1,595)	-9.2%	(1,894)	-5.2%	2,444	13.7%
Western	2022	12,181		11,644		25,076		11,805	
	2027	11,937		10,584		23,847		13,454	
	Change	(244)	-2.0%	(1,060)	-9.1%	(1,229)	-4.9%	1,649	14.0%
Southeastern	2022	3,402		3,195		6,061		3,005	
	2027	3,476		2,932		5,715		3,407	
	Change	74	2.2%	(263)	-8.2%	(346)	-5.7%	402	13.4%
Northeastern	2022	2,645		2,520		5,416		3,001	
	2027	2,620		2,248		5,097		3,394	
	Change	(25)	-0.9%	(272)	-10.8%	(319)	-5.9%	393	13.1%
NYS	2022	4,067,328		4,751,811		7,705,846		3,611,588	
	2027	3,833,531		4,461,023		7,526,799		3,957,456	
	Change	(233,797)	-5.7%	(290,788)	-6.1%	(179,047)	-2.3%	345,868	9.6%
Finger Lakes	2022	235,986		280,857		460,510		234,806	
	2027	230,507		263,023		442,500		263,229	
	Change	(5,479)	-2.3%	(17,834)	-6.3%	(18,010)	-3.9%	28,423	12.1%

Source: Esri, MRB Group

Anticipated Senior Housing Demand by 2027

	Wayne County	Western	Southeastern	Northeastern
Projected increase in 65+ population	2,444	1,649	402	393
Single Family Units	1,317	872	215	47
Rental Units	295	224	52	24

Source: MRB Group

Anticipated Unit Need per 100 New Residents

Population projections are not set in stone. Any number of circumstances, such as the location of a new major employer, could lead to an unanticipated influx (or exodus) of population. As such, Wayne County requested an assessment of the housing need for potential new residents. To accomplish this, we applied the current housing tenure trends of young adults, other working age, and senior age cohorts. Specifically, we applied the percentage that are likely to be householders (head of households), followed by the percentage of householders in each cohort that are homeowners and renters. This yielded the number single family and rental units per 100 new residents in each cohort, as shown in the table to the right.

As noted above, young adults and seniors are more likely to own homes than their peers in the region. As such, these trends could shift should more rental options become available throughout the County.

Anticipated Housing Need per 100 New Residents Given Current Tenure Trends, by Age

		% anticipated householders			Single Family units per 100	Rental units per 100
		% Owners	% Renters			
Wayne County	Young Adult	35.0%	59.1%	40.93%	21	14
	Working Age	56.5%	81.9%	18.1%	46	10
	Senior	66.0%	81.7%	18.3%	54	12
Western	Young Adult	36.2%	59.7%	40.3%	22	15
	Working Age	57.0%	81.6%	18.4%	47	10
	Senior	66.5%	79.6%	20.4%	53	14
Southeastern	Young Adult	30.6%	53.6%	46.4%	16	14
	Working Age	55.5%	81.2%	18.8%	45	10
	Senior	66.4%	80.4%	19.6%	53	13
Northeastern	Young Adult	34.3%	62.6%	37.4%	21	13
	Working Age	57.0%	81.4%	18.6%	46	11
	Senior	63.9%	18.6%	9.7%	12	6

Source: American Community Survey 5-year Estimates, MRB Group

Community Comparisons

Towns and villages should consider what a healthy age distribution and tenure mix would look for their community. The table below provides highlights of the age and housing mix in other Upstate NY communities. These profiles are intended to show how these indicators can differ across community types. It is worth noting, however, that housing is just one component of a community development strategy. Aspiring to a demographic shift of any sort will require time and an array of initiatives addressing quality of life, services, and economics.

Community Profiles: Age and Housing

	Village of Rural Village		Village of Penn Rural Village		Town of Victor Urban Pressure		Town of Webster Urban Pressure		Town of Tully Rural Near City	
	2010	2022	2010	2022	2010	2022	2010	2022	2010	2022
Population	1,708	1,689	5,194	4,960	14,275	15,513	42,641	45,199	2,738	2,617
Population density	1,231	1,218	2,164	2,067	397	432	1,272	1,348	106	101
Child Population (under 18)	20.7%	18.2%	23.9%	20.9%	27.3%	23.0%	23.8%	20.2%	26.1%	19.6%
Young Adult Population (18-34)	13.7%	17.7%	19.6%	20.9%	12.2%	16.2%	15.6%	15.7%	12.5%	20.9%
Remainder Working-Age Population (35-64)	47.2%	37.0%	38.3%	37.1%	45.2%	40.0%	44.5%	42.4%	46.5%	38.6%
Senior Population (65+)	18.4%	27.1%	18.2%	21.1%	15.3%	20.8%	16.1%	21.7%	14.9%	21.0%
Median Age	46.8	49.6	41.0	42.0	42.2	45.3	42.9	45.3	42.3	44.6
Total Housing Units	864	905	2,415	2,463	5,822	6,915	17,860	20,454	1,189	1,234
Owner-Occupied	61.2%	63.3%	53.6%	53.9%	77.5%	74.9%	73.7%	70.9%	69.3%	66.8%
Renter Occupied	31.7%	28.1%	40.0%	37.2%	16.4%	18.4%	22.3%	23.7%	20.8%	21.6%
Vacant	7.1%	8.6%	6.4%	8.9%	6.0%	6.7%	4.0%	5.4%	9.9%	11.7%

Source: Esri

Conclusions

The above needs assessment indicates the following:

- Wayne County residents are generally more likely to own homes than residents of the Finger Lakes Region. There is likely demand for additional rental units, particularly among young adults and seniors. Homeownership is particularly high among seniors in the Northeastern market area.
- The Western market area of the County has the highest level of cost burden among owner-occupied households. Given high demand in this area of the County, additional housing stock could help to control housing costs.
- The Southeastern market area has the highest level of cost burden among renter occupied households, as well as the highest concentration of substandard, obsolete, and derelict units. As such, availability of rental units and housing quality are primary concerns in this area.



Chapter 3: Existing Conditions - Wayne County Plans, Initiatives & Programs



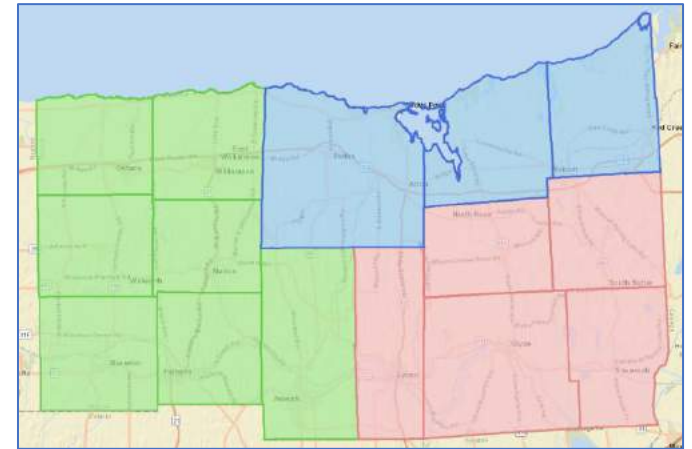
PREPARED BY

MRB | *group*

January 2023

The Wayne County Planning Department engaged MRB Group to undertake an analysis of housing needs and to develop an implementation strategy to address those needs. The first step in that process was to review existing plans, strategies, initiatives, and programs to ensure that any future strategy aligns with, but does not duplicate, what already exists in the community.

This memo includes two sections. The first section provides an overview various regional, County, and local community plans and strategies, particularly common themes impacting or related to housing. Through some initial data analysis, the MRB team identified three market areas within the County, shown on the map to the right. Review of the plans for each market area also revealed some unique attributes in each, which are outlined as well. The second section of this memo provides an overview of existing initiatives and programs that support housing development, quality, and access within Wayne County.



Plans & Strategies

Regional Plans

There are two regional organizations with plans that are particularly relevant in terms of accessing funding and resources for housing projects: the Genesee/Finger Lakes Regional Planning Council with its Comprehensive Economic Development Strategy (GFLRPC CEDS) 2021-2025 and Regional Land Use Monitoring Reports, and the Finger Lakes Regional Economic Development Council (REDC) with its 2020 Recovery Strategy and annual progress reports.

The GFLRPC CEDS for 2021-2025 has a number of goals, but goal #9 provides the best opportunity for alignment: “Advance Community Development and Encourage Main Street Revitalization and Historic Preservation” Objective 9B under this goal is to “Provide stable housing opportunities within the Region.” There are three actions under this objective that could be used to show alignment with this plan, which would help if/when pursuing US Economic Development Agency funding.

The GFLRPC Regional Land Monitoring Reports provide data on building permits to show areas of growth that may require additional infrastructure investment. The 2019 Monitoring Report showed 97 residential permits encompassing 116 housing units. Of those, 86 were for single family units (including 17 mobile/manufactured homes) and 11 were for multi-family buildings (30 units total). The Town of Ontario had the highest number of permits, followed by the Town of Macedon. This trend was similar over the five-year period from 2015 to 2019, with the Town of Ontario and Town of Macedon having the most residential units permitted (190 and 113 respectively, out of 706 total in

the County). In 2019, the Town of Ontario also had 2 subdivision proposals, 13 residential demolition permits, and roughly 20% of the County's remodel/upgrade permits (450).

Meanwhile, the Town of Lyons had higher proportions of permits for industrial, commercial, community service, and mixed-use purposes. In fact, in 2019 Lyons had among the highest levels of industrial and commercial building permits in the Genesee/Finger Lakes region. The Town of Lyons also had the second highest number of remodel/upgrade permits in the County with 250. From 2015 to 2019, the Town of Lyons had roughly half of the County's industrial permits (26 of 59) and nearly all of the County's commercial units permitted (223 of 239). To the extent that these commercial and industrial permits are tied to business attraction, expansion, and job growth, this could be one indicator of a growing need for workforce housing.

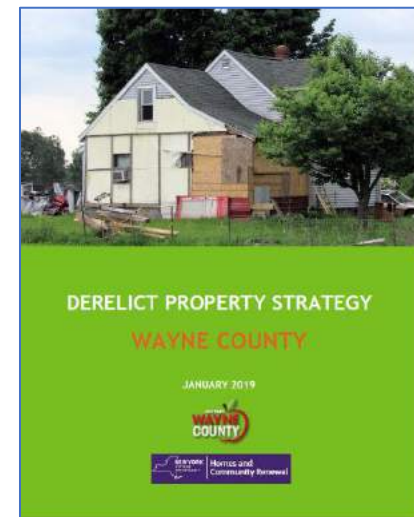
The Finger Lakes REDC has a number of plans, but the most recent Annual Progress Reports are based on a framework that includes Goals, Industry Pillars, and Enablers. The Goals include increased regional wealth, poverty reduction, and economic justice. The Enablers to reaching those goals include talent development and foundational assets like vibrant urban cores and quality of life factors, including cost of living. The 2021 Progress Report and 2020 Recovery Strategy also point to key priority areas of focus including talent attraction and downtown revitalization. Housing investments could align with these priority areas, and as such open the opportunity to apply for State funding.

Furthermore, the Finger Lakes REDC has identified various factors that present challenges to meeting these goals, particularly economic justice. Those include accessible and affordable childcare, affordable housing options, broadband and digital access, and adequate transportation. All of these are also barriers to employment for many households, especially in rural areas, and will be critical to any housing strategy intended to attract working families and/or support low income households.

County-level Plans

Wayne County already has a jump start on a housing strategy given two existing reports: the 2019 Derelict Property Strategy, funded by NYS Homes & Community Renewal, and the 2021 Wayne County Housing Needs Assessment, funded by the NYS Preservation Opportunity Program (NYS-POP) and administered by the New York State Office of the Attorney General and Enterprise Community Partners, Inc. The goals of the NYS-POP plan were to "preserve existing affordable housing by identifying local factors that create barriers to housing, identifying populations in need of affordable housing, and describing the existing supply of affordable housing and any gaps based on location, income, geography and the specialized needs of particular populations."

The Wayne County Housing Needs Assessment for affordable rental housing in Wayne County identifies and addresses the complex interaction of demographic, household income, geography, and supply of



housing. Demographics show a slow population growth in the region and County, and an aging population posing particular challenges for the future demand for housing in the County. Income differs by location and rental. The rural areas in the County display a lower median incomes, and renter households display lower levels of income than owner-occupied households in the County. The location of affordable rental housing impacts access to resources in the community and influences employment opportunities for residents. Although, the most pervasive issues are the aging housing stock and shortage of quality housing in the County. However, population and housing demand are projected to grow over the next 20 years, and as such these challenges must be addressed.

This Needs Assessment was the first phase of the NYS-POP Program. The next phase of the NYS-POP program included an Action Plan that identified and implemented projects for the preservation of affordable rental housing units in the County. The action items included an update to the Derelict Property Study, training for landlords, a housing rehab program for Section 8 housing rental units, and a predevelopment loan program for regulated affordable housing projects in the County. The NYS-POP report also recommended the creation of a comprehensive housing plan. These recommendations align with some of the recommendations from the Derelict Property Strategy, including efforts to work with municipalities to define strategic areas and corridors for reinvestment, promote training and support for homeowners and first-time home buyers, enact policies and codes to incentivize property owners making improvements, and seek State and federal funding to address home rehab and weatherization. This strategy also recommends focused investment around key areas that have existing infrastructure, resources, and services.

Since completing these plans, the County has begun partnering with organizations to help address quality affordable housing in the community.

Local Community Plans and Land Use

Twenty-one local plans and strategies were reviewed. One of the most common themes across these documents was the desire to maintain and preserve agricultural and rural character, as well as open spaces and scenic views. In many towns, agriculture and residential are the top two land uses by area. The table to the right shows the reported land use proportion of agriculture and residential.² Some towns recognize the sometimes-competing needs for these two uses, and the importance of zoning and regulations that ensure residential development does not jeopardize the community's character. Most plans recommend low-density, single family residential in rural/agricultural areas while concentrating medium- and high-density residential development around villages and hamlets. This serves a dual

Land Use as a Percent of Total Acreage

Area	Municipality	Agriculture	Residential
West	Marion	65.2%	16.1%
	Ontario	15.0%	53.0%
	Williamson	45.7%	35.2%
	Macedon	32.8%	36.0%
	Palmyra	58.0%	NR
Northeast	Huron	46.7%	11.0%
	Sodus	54.0%	NR
Southeast	Lyons	37.0%	40.0%
	Butler	60.0%	23.3%
	Clyde	24.0%	36.0%
	Galen	63.0%	14.0%
	Savannah	48.0%	10.0%

Source: respective comprehensive plans

NR= not reported

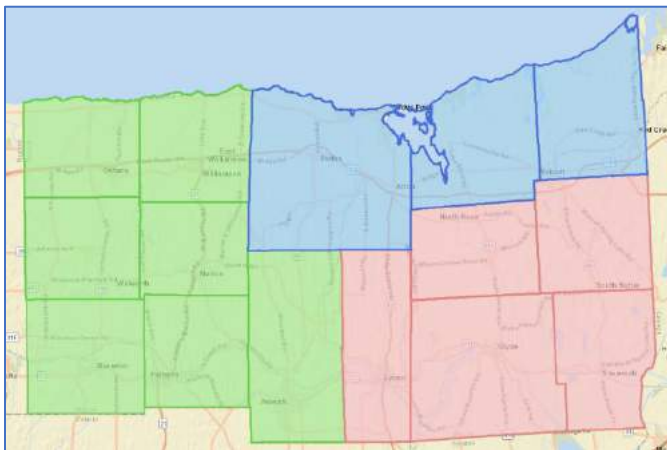
² Only municipalities that reported agricultural and residential land use proportions are included in the table. Also note that these plans are from different timeframes, so these figures are not necessarily reflective of current land use patterns.

purpose of preserving rural character and agricultural production, while also maximizing the use of existing infrastructure to prevent expansion investments and increasing maintenance costs.

Generally speaking, communities across Wayne County report having a high level of home ownership. In 2022, 48% of all housing units were owner occupied³. The reviewed comprehensive plans, while from varying timeframes, typically reported homeownership above this level. Five reported levels above 80%, and only one (Huron) reported homeownership below 50%. Five of the plans did not report home ownership rates.

Most towns note a need for more varied or diversified housing types to accommodate, retain, and attract residents ranging from young professionals and families to senior citizens. Senior housing is the most commonly noted need as many of the towns have aging populations. Housing affordability is also a noted priority or consideration in the following comprehensive plans: Marion; Williamson; Ontario; and the joint Clyde, Galen and Savannah plan. Other plans also refer to affordability in specific contexts (such as senior housing or affordable home ownership), as well as include actions that align with affordability without specifically stating affordability as a priority. This includes Huron, Palmyra and Lyons.

Many towns are also experiencing challenges related to property conditions. Overall, the housing stock across the County is older, and many properties have fallen into disrepair or have code violations. Numerous plans and strategies recommend that municipalities seek out State and federal funding, as well as develop programming, to incentivize and support property and homeowners in undertaking rehabilitation, repair, and maintenance efforts.



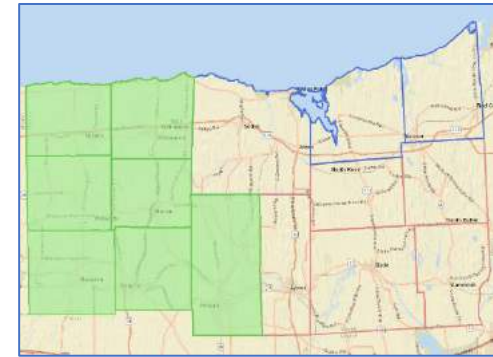
As noted earlier, the MRB Team and County staff have identified three distinct market areas within the County: West, Northeast - Lakefront, and Southeast. The plans for each of these areas align with the common themes above, but one or two additional trends emerge within each area. Those trends, as well as the plans reviewed for each area, are outlined below. The sections below also include past and current land use distributions for each town within the market area.⁴ In comparing land use over time, it is worth noting that there are numerous possible reasons for a change in real property classifications. As such, not all changes are caused by a true conversation of land use.

³ Source: Esri

⁴ Land use data is sourced from Wayne County Real Property Assessment data.

West: Ontario, Walworth, Macedon, Williamson, Marion, Palmyra, Arcadia

This area tends to focus more on downtown development and infill/adaptive reuse opportunities for mixed-use and multifamily residential development. However, these towns and villages still see value in maintaining rural character. When comparing the land use distributions in the table below (2012 to 2022), there is an apparent shift from agricultural and vacant uses to residential use in Marion and Ontario. Ontario has the lowest level of residential land use in Wayne County (14.7%), but also has the fastest growth in this use (7.1%). Conversely, Ontario has among the highest level of agricultural land use (52.3%), second only to Walworth (53.7%). Agricultural use is fastest growing in Walworth (7.6%) as well. Agricultural and residential uses decreased in Macedon (-3.3% and -3.4% respectively), shifting primarily to vacant land (4.7%). This might be tied to the creation of dedicated development areas that have yet to be built on. Palmyra, Walworth, and Williamson all saw relatively dramatic reductions in residential use (-8.8%, -5.3% and -8.8% respectively), with land shifting to primarily agricultural and vacant uses. Additional comparison with 2017 land use distributions reveals more about these shifts. In Palmyra, the shift appeared to happen gradually over time with residential land use at 47.7% in 2017. In Walworth, all of the shift occurred prior to 2017 with residential use at 20.5% that year. The opposite is true in Williamson, where most of the shift has occurred since 2017 (45.8% residential land use).



Plans reviewed: Town of Marion Comprehensive Plan Update (2017/18); Town of Ontario Comprehensive Plan (2006); Town of Walworth Comprehensive Plan (2016); Williamson Comprehensive Plan (2021); Village of Newark DRI Strategic Investment Plan (2021); Macedon Downtown Revitalization Plan (2009); Macedon LWRP (2016); Onward Ontario (2021); Town of Arcadia Comprehensive Plan (2004); Macedon Comprehensive Plan (1999); Palmyra Comprehensive Plan (2004).

Land Use: West Market Area

Use Type	Town of Arcadia			Town of Macedon			Town of Marion			Town of Ontario			Town of Palmyra			Town of Walworth			Town of Williamson		
	2012	2022	Change	2012	2022	Change	2012	2022	Change	2012	2022	Change	2012	2022	Change	2012	2022	Change	2012	2022	Change
Residential	40.2%	38.8%	-1.4%	20.0%	16.6%	-3.4%	32.3%	34.2%	1.9%	7.6%	14.7%	7.1%	51.6%	42.8%	-8.8%	26.0%	20.7%	-5.3%	48.0%	39.3%	-8.8%
Agricultural	36.0%	37.3%	1.3%	51.0%	47.6%	-3.3%	47.9%	46.8%	-1.1%	55.7%	52.3%	-3.4%	31.1%	33.6%	2.5%	46.1%	53.7%	7.6%	34.4%	41.0%	6.6%
Vacant land	12.8%	13.0%	0.2%	16.6%	21.4%	4.7%	16.7%	15.9%	-0.8%	28.1%	23.7%	-4.4%	8.4%	12.2%	3.9%	19.5%	19.8%	0.3%	10.9%	13.1%	2.2%
Commercial	2.4%	2.4%	0.0%	3.8%	4.2%	0.3%	1.4%	1.5%	0.1%	2.9%	3.7%	0.8%	1.8%	1.9%	0.2%	1.6%	1.1%	-0.6%	1.8%	1.9%	0.0%
Recreation & entertainment	1.0%	0.9%	-0.1%	2.0%	2.4%	0.4%	0.1%	0.1%	0.0%	1.6%	1.7%	0.1%	0.7%	1.6%	0.8%	2.8%	1.5%	-1.3%	1.4%	1.1%	-0.2%
Community services	2.1%	2.0%	-0.1%	1.6%	1.6%	0.0%	0.9%	0.9%	0.0%	1.2%	1.2%	0.0%	1.0%	1.0%	0.0%	1.5%	0.8%	-0.7%	1.3%	1.3%	0.1%
Industrial	1.8%	1.8%	0.0%	1.5%	2.0%	0.5%	0.5%	0.4%	-0.1%	0.4%	0.4%	0.0%	1.4%	3.1%	1.6%	1.4%	1.4%	0.0%	1.8%	1.9%	0.0%
Public services	1.6%	1.6%	0.0%	3.4%	4.1%	0.8%	0.1%	0.2%	0.1%	2.3%	2.1%	-0.2%	3.1%	2.9%	-0.1%	0.7%	0.7%	0.0%	0.3%	0.4%	0.1%
Wild, forested, conservation lands and public parks	2.0%	2.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.9%	0.0%	0.3%	0.3%	0.0%	0.0%	0.0%	0.0%

Source: Wayne County Real Property Assessment Data, MRB Group



Northeast - Lakefront: Sodus, Huron, Wolcott

The towns in the northeast see relatively high concentrations of seasonal occupation, particularly along the lakefront. According to the stakeholder engagement component of these plans, residents tend to have a distinct interest in limiting any waterfront development to maintain quietness and views. However, the resulting plans tend to include recommendations for targeted development (generally not residential) to allow for greater public access to and recreation on the water. Comparing the current land use to that of 2022 as seen below, there were almost equal shifts from residential and agricultural uses to vacant land in Huron, vacant land to residential uses in Sodus, and agricultural to residential use in Wolcott. However, all of these shifts were less than 2%. In 2022, Wolcott had the highest vacant land level in Wayne

County at 27.2%.

Plans reviewed: Town of Huron Master Plan (2012); Town & Village of Sodus Comprehensive Plan (2005); Village of Sodus LWRP (2006, amended 2011); Town of Wolcott LWRP (2010).

Land Use: Northeast Market Area

Use Type	Town of Huron			Town of Sodus			Town of Wolcott		
	2012	2022	Change	2012	2022	Change	2012	2022	Change
Residential	48.3%	46.5%	-1.9%	45.0%	46.6%	1.6%	17.2%	18.6%	1.4%
Agricultural	22.7%	21.5%	-1.2%	30.8%	30.8%	0.0%	41.9%	40.6%	-1.3%
Vacant land	23.4%	26.2%	2.7%	18.1%	16.6%	-1.5%	27.0%	27.2%	0.2%
Commercial	2.8%	3.2%	0.4%	1.7%	1.8%	0.0%	1.4%	1.1%	-0.3%
Recreation & entertainment	0.2%	0.2%	0.0%	1.0%	1.0%	0.0%	0.7%	0.8%	0.1%
Community services	0.2%	0.2%	0.0%	0.5%	0.5%	0.0%	1.6%	1.5%	-0.2%
Industrial	0.3%	0.2%	0.0%	1.3%	1.2%	0.0%	0.5%	0.5%	0.0%
Public services	0.0%	0.0%	0.0%	1.2%	1.0%	-0.1%	1.3%	1.4%	0.0%
Wild, forested, conservation lands and public parks	2.0%	2.0%	-0.1%	0.4%	0.4%	0.0%	8.4%	8.6%	0.1%

Source: Wayne County Real Property Assessment Data, MRB Group

Southeast: Butler, Rose, Lyons, Galen, Savannah

While preservation of agricultural and rural character is important throughout the County, this area tends to prioritize it at the highest level. The table on the next page compares 2012 and 2022 land use distributions. In 2022, Butler had the highest level of residential land use in the County, and Savannah had the highest level of “wild, forested, conservation lands and public parks” in the County. Savannah saw the most drastic change in this market area, with residential land use declining by 5.8%. This was offset by increases in agricultural and “wild, forested, conservation lands and public parks” uses. Most of this shift appears to have occurred prior to 2017, when residential land use in Savannah was 46%. Lyons saw a 3% increase in residential land use, offset mostly by a 2.1% decline in vacant land.



Plans reviewed: Lyons 2040 (2021); Downtown Savannah Vision Plan and Design Principles (2009?); Butler Agriculture & Comprehensive Plan (2009); Village of Clyde Derelict Properties Appendix (2018); Village of Clyde, Town of Galen, Town of Savannah Joint Comprehensive Plan (2010); Clyde Village Hub Planning & Design Recommendations (2018).

Land Use: Southeast Market Area

Use Type	Town of Butler			Town of Galen			Town of Lyons			Town of Rose			Town of Savannah		
	2012	2022	Change	2012	2022	Change	2012	2022	Change	2012	2022	Change	2012	2022	Change
Residential	60.2%	59.5%	-0.6%	56.6%	16.6%	-0.7%	35.6%	38.6%	3.0%	52.4%	50.5%	-1.9%	51.3%	45.6%	-5.8%
Agricultural	22.6%	21.6%	-1.0%	19.1%	47.6%	0.4%	40.7%	40.4%	-0.3%	25.5%	25.8%	0.3%	14.7%	17.5%	2.8%
Vacant land	13.3%	13.9%	0.6%	6.9%	21.4%	0.9%	16.8%	14.7%	-2.1%	19.6%	20.9%	1.3%	10.1%	10.3%	0.3%
Commercial	0.8%	1.8%	1.0%	0.6%	4.2%	-0.1%	2.0%	1.4%	-0.6%	0.4%	0.5%	0.0%	1.5%	1.6%	0.1%
Recreation & entertainment	0.0%	0.0%	0.0%	0.7%	2.4%	0.0%	0.7%	0.7%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%
Community services	0.8%	0.4%	-0.4%	0.4%	1.6%	0.0%	1.3%	1.3%	0.0%	0.8%	0.8%	0.0%	0.5%	1.0%	0.5%
Industrial	1.5%	2.0%	0.4%	2.1%	2.0%	-0.7%	0.5%	0.5%	0.0%	0.7%	0.7%	0.0%	0.0%	0.0%	0.0%
Public services	0.1%	0.1%	0.0%	5.2%	4.1%	0.1%	2.2%	2.2%	0.0%	0.6%	0.6%	0.0%	0.6%	0.6%	0.0%
Wild, forested, conservation lands and public parks	0.6%	0.6%	0.0%	8.3%	0.0%	0.1%	0.2%	0.2%	0.0%	0.0%	0.2%	0.2%	21.2%	23.3%	2.1%

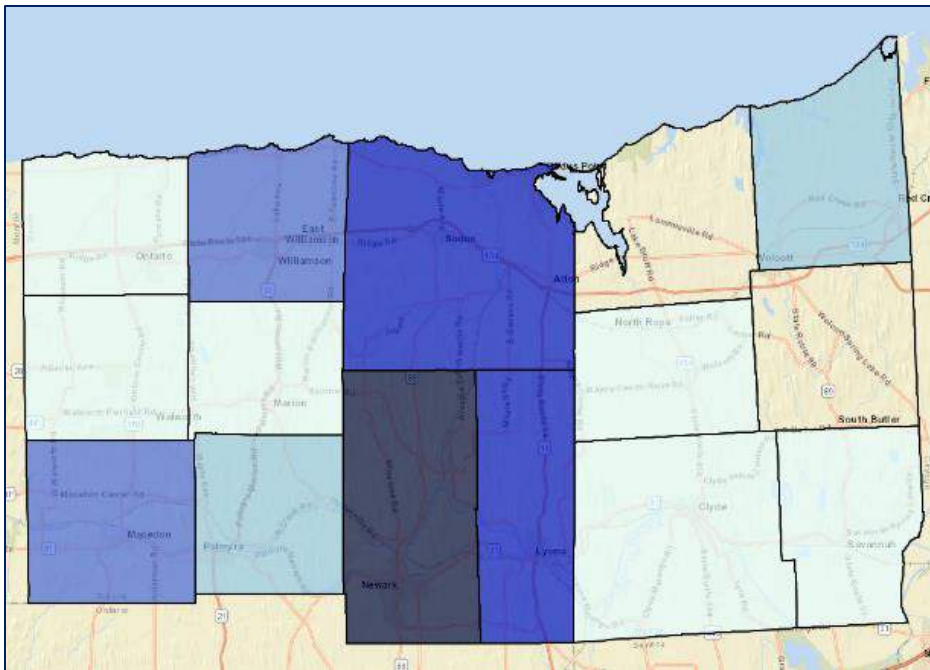
Source: Wayne County Real Property Assessment Data, MRB Group

Initiatives & Programs

There are a number of existing programs and initiatives addressing housing and residential real estate in Wayne County, listed below. Many of these programs focus on housing affordability and access. There are also multiple programs addressing housing rehabilitation and energy efficiency. However, given the high proportion of home ownership and aging populations, there are few programs focused on home buyer/owner supports, low income home ownership, and owner-occupied senior housing.

Housing Affordability & Homelessness

- Section 8 housing vouchers are administered by the Newark Housing Authority and Geneva Housing Authority.



There are a total of 615 Section 8 units in Wayne County. The map to the right shows the concentration of Section 8 housing units in each town. The towns without colors have no units, then the colors progress from light to dark blue as the number of units increase. The most units are in the Village of Newark (196), followed by the Town of Sodus (99, including those in villages and hamlets). As of 2021, Newark Housing Authority had 375 vouchers and Central Office (now Geneva Housing Authority) had 240 vouchers for a total of 615. This may indicate that there are not enough units to fill the demand or need for Section 8 housing in Wayne County.

- Wayne County DSS provides a Housing List outlining specialized housing options, including affordable and senior units.

- Regulated affordable housing is available through Newark Housing Authority, PathStone, Sheen, and other local entities. A full, current list of affordable housing providers is available from the Wayne County Department of Social Services.
- Finger Lakes Area Counseling & Recovery Agency / Finger Lakes Housing Consortium offers housing and other services for individuals affected by substance use disorder and mental health needs, including:
 - Addiction Crisis Center
 - 820 residential services, supportive living, and independent housing programs
 - Outpatient services
 - Veteran services
 - Mental health services
- Finger Lakes Community Action offers the Success Center Second Chances Program.

Property Rehabilitation

- The Brownfield Coalition, including brownfield and derelict properties initiatives, is led by the Wayne County Planning Office, and supported by coalition partners including Wayne County Regional Land Bank, Wayne Economic Development Corporation (WEDC), Towns of Arcadia and Lyons, and the Village of Newark.
- The Landlord Housing Rehab Program is operated by the Housing Council at PathStone, which assists landlords with properties that recently failed a HUD Housing Quality & Safety inspection for section 8 housing.
- The Pre-Development Loan Fund is administered by the Greater Rochester Housing Partnership, offering 0% interest loan to assist with projects that preserve affordable housing.
- PathStone offers an Owner-Occupied Home Repair program for low income families, as well as home energy and weatherization support.
- Sheen Housing also offers a Home Repair program for low income households.
- Finger Lakes Community Action offers Housing Efficiency programs, such as Energy Reduction Services and Weatherization support.
- The Farm Worker Housing Replacement Program, administered by Wayne County in partnership with PathStone, provides funding to farm employers to replace mobile/manufactured homes that are farmworker-occupied. The funding for this program was limited.

Senior/Disabled

- Wayne County DSS's Housing List includes senior and accessible units.
- Arc Wayne provides supportive housing for adults with intellectual and developmental disabilities.

- Finger Lakes Community Action offers the Older Adults and Sound Home Modification Program (OASAS), which assists low-income senior citizens with home modifications that allow them to age in place.

Home buyer support

- PathStone offers housing counseling and a homebuyer education course.
- Sheen Housing also offers a Homebuyer Education course, counseling, and some financial assistance for closing costs.

Conclusion

Wayne County and its component communities recognize the importance of diverse, quality housing to quality of life, growth, and the tax base. Many towns want to maintain their rural or agricultural character, but also see the need to accommodate a variety of residents at all income levels, from young families to senior citizens. Existing plans and strategies rely primarily on two means of doing this: targeted/intentional development of new housing units and rehabilitation of existing properties that are in poor condition. To accomplish the goals and priorities of these plans, communities will need to carefully zone and plan for the development of units that align with both existing and future housing demand. Additional targeted incentives would also help to ensure that development aligns with community goals, such as 485a property tax abatements in villages, hamlets and town centers, 444-a property tax abatements for historic properties, grant funding opportunities like New York Main Street, and providing information and guidance about tax credits available from the State and federal government.

While there are some programs within the County to address housing affordability and property rehabilitation, there is not much programming to support home buyers and owners. Given high levels of home ownership across the County, it is likely that there are programming gaps around supporting wealth generation through property ownership, first time homebuyers, and aging in place for seniors.





Chapter 4: The Demographic Landscape



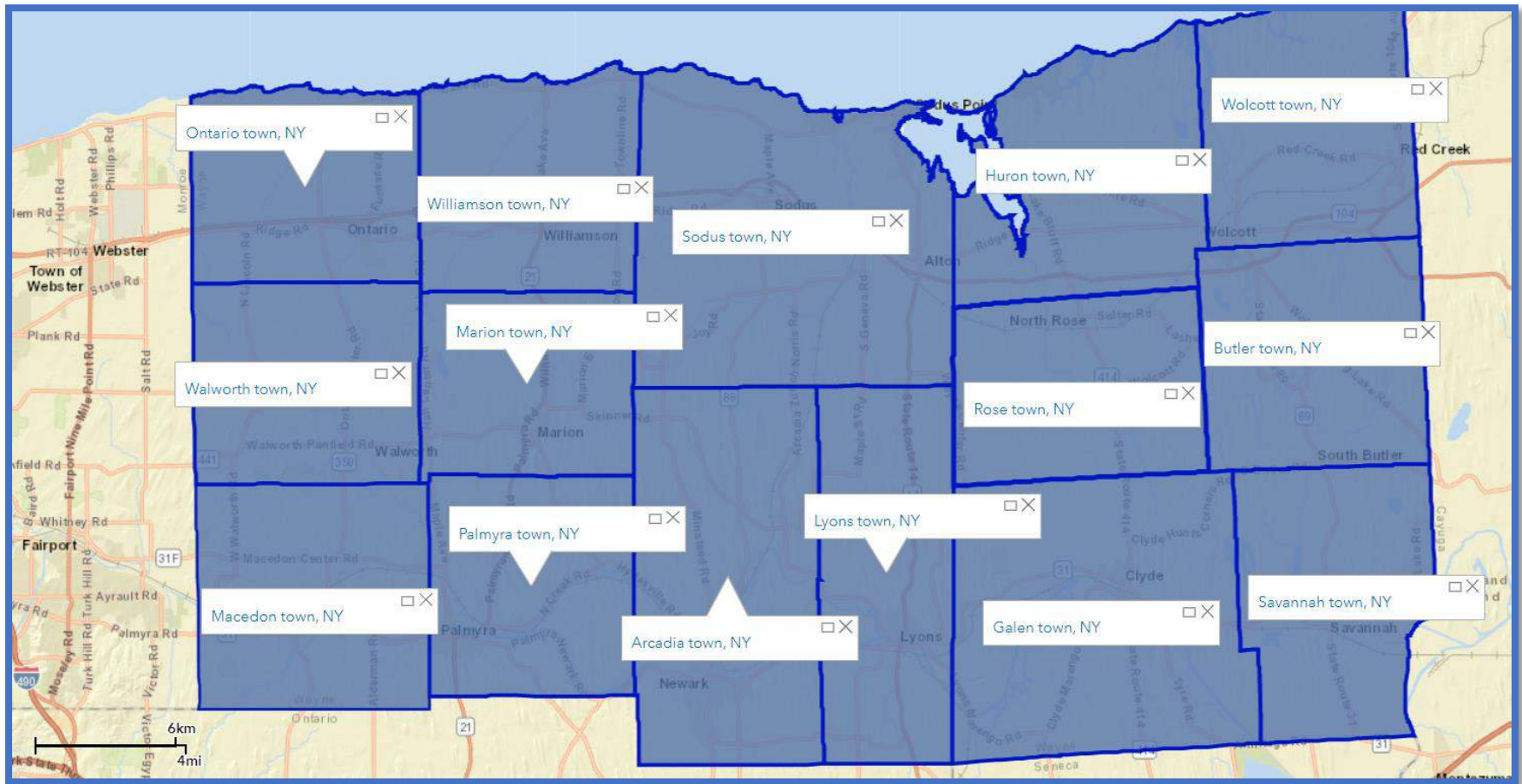
PREPARED BY

MRB | *group*

October 2022

Market Area

The following demographic overview is a town-level analysis of Wayne County. We include data for the County's 15 Towns, as pictured below, as well as, the County as a whole.



Historic and Projected Population Growth

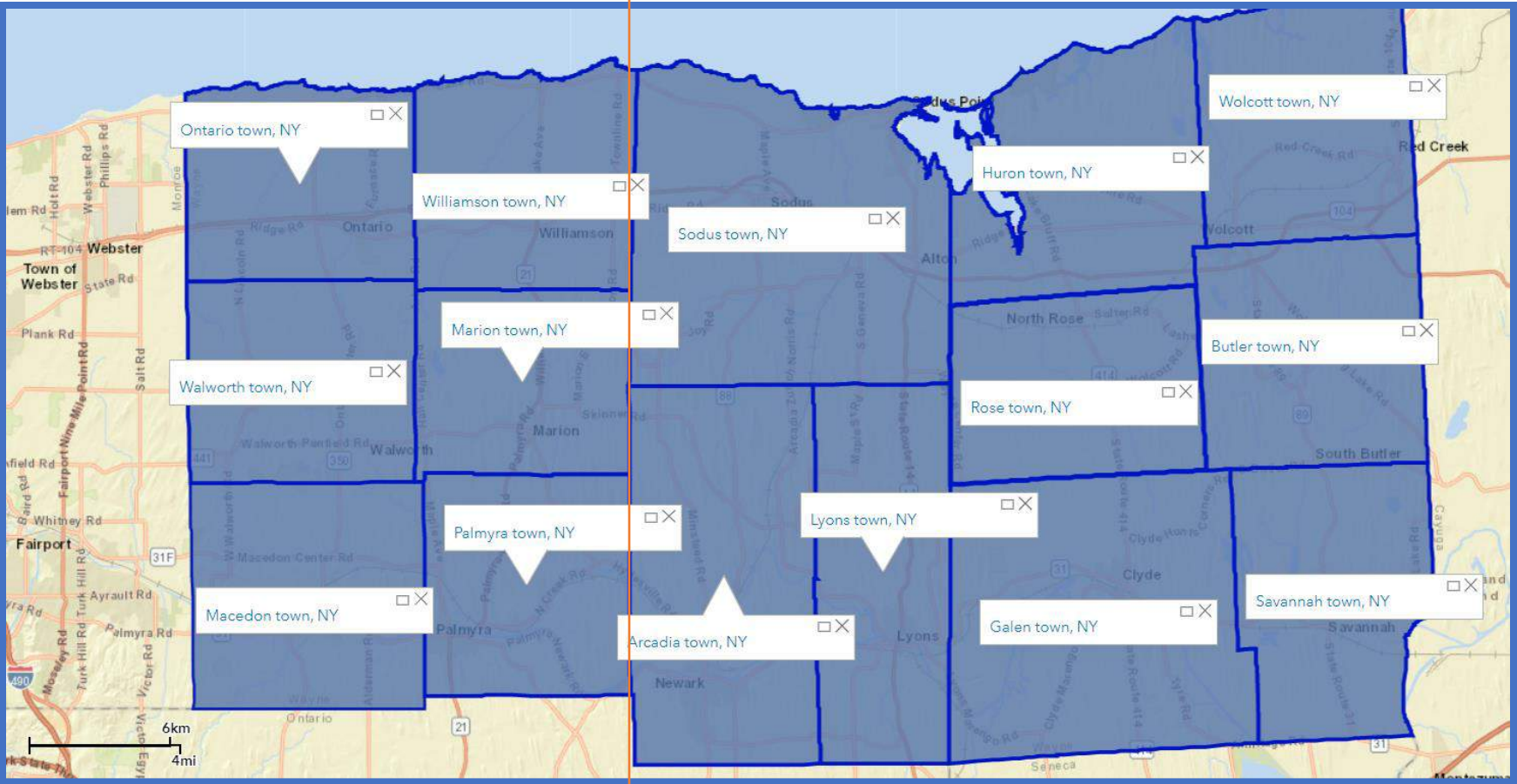
- Population of the County is estimated at 89,951 in 2022.
- Over the last twelve years, population has grown in the Town of Ontario and the Town of Galen.
- Projected through 2027, population is anticipated to grow slightly in the Town of Rose and the Town of Huron.
- 31.7% of the County's population live in three Towns on the western border of the County.
- The County's eastern border has significantly lower population density.

Population Summary

Municipality	2010 Population	2022 Population	2027 Population	2022 % of Total Population	2010 - 2022 Population Growth	2022 - 2027 Population Growth
Wayne County	93,772	89,951	88,711	100.0%	-4.1%	-1.4%
Arcadia	14,274	13,489	13,383	15.0%	-5.5%	-0.8%
Ontario	10,136	10,253	10,103	11.4%	1.2%	-1.5%
Walworth	9,449	9,198	9,035	10.2%	-2.7%	-1.8%
Macedon	9,148	9,105	8,946	10.1%	-0.5%	-1.7%
Sodus	8,384	7,751	7,600	8.6%	-7.6%	-1.9%
Palmyra	7,975	7,411	7,263	8.2%	-7.1%	-2.0%
Williamson	6,984	6,774	6,703	7.5%	-3.0%	-1.0%
Lyons	5,652	5,625	5,590	6.3%	-0.5%	-0.6%
Marion	4,746	4,474	4,386	5.0%	-5.7%	-2.0%
Galen	4,306	4,341	4,280	4.8%	0.8%	-1.4%
Wolcott	4,453	3,925	3,841	4.4%	-11.9%	-2.1%
Rose	2,378	2,291	2,311	2.5%	-3.7%	0.9%
Huron	2,118	1,906	1,918	2.1%	-10.0%	0.6%
Butler	2,055	1,805	1,782	2.0%	-12.2%	-1.3%
Savannah	1,714	1,603	1,570	1.8%	-6.5%	-2.1%

Source: Esri BAO

2022 Population Distribution



Roughly 50/50 split of 2022 Population

Households

A household is a collection of individuals living within the same housing unit, regardless of relation. The number of households in a community is impacted by both population and average household size. For this reason, two communities with the same population may have a different number of households based on the average household size in each community. The community with the larger average household size would have fewer households for the same size population.

The number of households in Wayne County, and most of the Towns within, is projected to stay relatively stable over the next 5 years. Nearly all Towns are anticipated to see a change of less than 1% by 2027. Given projected population declines, this indicates that the average household size in most areas is shrinking as well.

If both population and average household size continue to decline, trends in demand for housing will likely lag behind population change. However, a

Households Summary

Municipality	2010 Households	2022 Households	2027 Households	2022 % of Total	2010 - 2022 Growth	2022 - 2027 Growth
Wayne County	36,585	37,318	37,385	100.0%	2.0%	0.2%
Arcadia	5,783	5,898	5,933	15.9%	2.0%	0.6%
Ontario	3,960	4,224	4,232	11.3%	6.7%	0.2%
Macedon	3,650	3,836	3,829	10.2%	5.1%	-0.2%
Walworth	3,356	3,526	3,519	9.4%	5.1%	-0.2%
Sodus	3,325	3,314	3,303	8.8%	-0.3%	-0.3%
Palmyra	3,255	3,189	3,180	8.5%	-2.0%	-0.3%
Williamson	2,773	2,817	2,832	7.6%	1.6%	0.5%
Lyons	2,215	2,252	2,271	6.1%	1.7%	0.8%
Marion	1,814	1,871	1,868	5.0%	3.1%	-0.2%
Wolcott	1,732	1,663	1,657	4.4%	-4.0%	-0.4%
Galen	1,601	1,657	1,655	4.4%	3.5%	-0.1%
Rose	896	928	952	2.5%	3.6%	2.6%
Huron	855	802	816	2.2%	-6.2%	1.7%
Butler	731	710	709	1.9%	-2.9%	-0.1%
Savannah	639	631	629	1.7%	-1.3%	-0.3%

Source: Esri BAO

reversal in either population or average household size would likely create higher housing demand pressures.

Daytime Population: Commuting

This table shows the difference between the daytime population and the total population for each Town and the County.

- County has a net out-commuting population with approximately 10,308 residents that work elsewhere.
- Town of Arcadia has a significant in-commuter population where the daytime population exceeds residential population by over 3,000 people. This is likely driven by major employers located in and around Newark.
- Towns in the western half of the County have the largest out-commuting populations, likely driven by proximity to the Rochester MSA.

2022 Total Daytime Population

Municipality	Daytime Population	2022 Total Population	Difference
Wayne County	79,643	89,951	(10,308)
Walworth	6,295	9,198	(2,903)
Ontario	8,211	10,253	(2,042)
Palmyra	5,733	7,411	(1,678)
Sodus	6,393	7,751	(1,358)
Macedon	7,825	9,105	(1,280)
Marion	3,422	4,474	(1,052)
Williamson	5,793	6,774	(981)
Galen	3,708	4,341	(633)
Wolcott	3,339	3,925	(586)
Rose	1,762	2,291	(529)
Butler	1,395	1,805	(410)
Savannah	1,294	1,603	(309)
Huron	1,805	1,906	(101)
Lyons	5,553	5,625	(72)
Arcadia	17,115	13,489	3,626

Source: Esri BAO

2022 Median Household Income

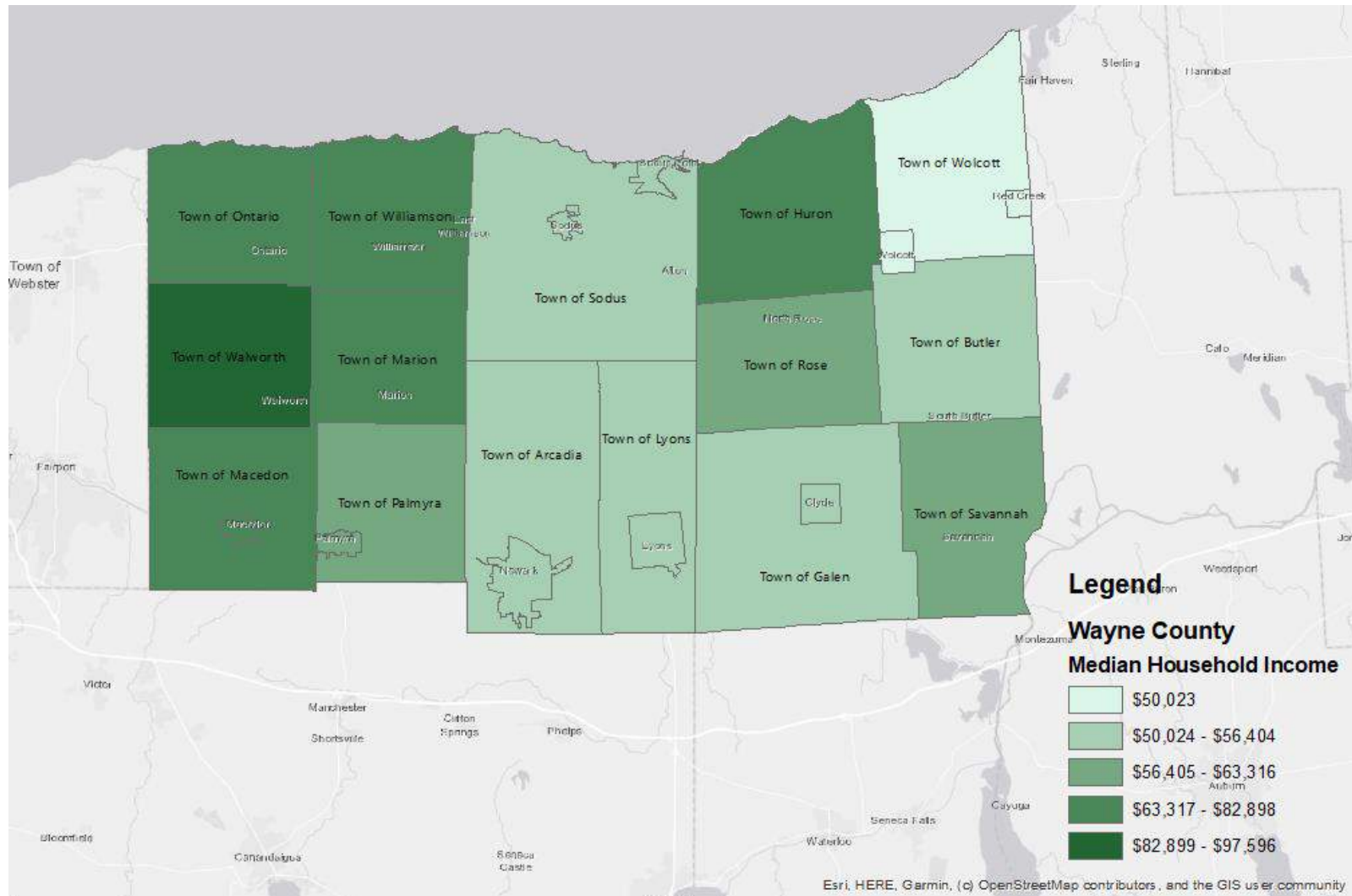
- In general, median household income (MHI) is higher along the northern and western borders of the County.
- MHI is highest in the Towns of Walworth, Huron, and Ontario
- The villages within Wayne County tend to have lower median incomes than their respective towns (the Villages of Sodus Point and Red Creek being the exceptions), and generally have lower concentrations within the middle-income brackets.

Household Income Distribution & Median Household Income, 2022

Municipality	<\$15,000	\$15,000 - \$24,999	\$25,000 - \$34,999	\$35,000 - \$49,999	\$50,000 - \$74,999	\$75,000 - \$99,999	\$100,000 - \$149,999	\$150,000 - \$199,999	\$200,000+	Median Household Income
Walworth	4.2%	3.5%	5.9%	7.7%	14.7%	15.2%	27.1%	11.2%	10.6%	\$97,596
Huron	9.4%	3.7%	4.6%	12.1%	15.3%	12.8%	21.3%	8.2%	12.5%	\$82,898
Ontario	5.2%	6.7%	10.3%	9.2%	15.2%	14.9%	21.3%	8.0%	9.3%	\$79,550
Williamson	11.8%	5.5%	8.1%	9.8%	14.1%	16.8%	17.0%	9.1%	7.9%	\$75,859
Marion	11.3%	3.7%	6.5%	9.8%	20.6%	18.5%	20.8%	5.4%	3.5%	\$71,856
Macedon	6.4%	7.3%	12.1%	8.6%	17.7%	14.0%	18.6%	7.5%	7.8%	\$70,937
Wayne County	10.9%	6.8%	10.2%	10.6%	17.2%	14.7%	17.7%	5.8%	6.1%	\$64,809
Savannah	10.1%	6.0%	10.5%	11.9%	18.4%	18.5%	14.6%	2.4%	7.6%	\$63,316
Rose	9.8%	7.2%	12.5%	10.1%	18.8%	18.4%	11.1%	2.4%	9.7%	\$61,358
Palmyra	14.7%	6.6%	12.4%	9.7%	13.5%	15.3%	15.1%	5.8%	7.0%	\$60,204
V. of Palmyra	18.0%	7.1%	13.9%	9.4%	13.4%	13.9%	17.4%	3.0%	4.0%	\$52,288
Galen	12.3%	7.1%	12.6%	11.0%	20.4%	12.6%	17.2%	4.0%	2.8%	\$56,404
V. of Clyde	11.0%	7.8%	17.8%	10.2%	17.9%	11.6%	17.9%	2.5%	3.3%	\$53,248
Butler	12.7%	6.6%	12.0%	11.8%	21.9%	14.4%	10.6%	3.2%	6.8%	\$55,652
Lyons	14.7%	8.8%	7.9%	13.3%	19.3%	17.7%	14.2%	3.2%	0.8%	\$54,956
Sodus	13.3%	8.3%	9.7%	13.9%	18.6%	12.2%	16.1%	3.7%	4.3%	\$54,681
V. of Sodus	19.0%	12.8%	12.6%	16.9%	17.0%	14.2%	5.2%	2.2%	0.1%	\$38,883
V. of Sodus Point	11.0%	9.8%	11.8%	13.3%	14.0%	10.0%	19.3%	5.3%	5.8%	\$55,859
Arcadia	14.3%	8.2%	12.4%	11.9%	18.2%	13.4%	16.0%	2.8%	2.8%	\$53,123
V. of Newark	16.7%	7.7%	13.8%	12.0%	17.6%	12.4%	13.4%	2.8%	3.4%	\$49,474
Wolcott	17.9%	8.6%	11.7%	11.7%	20.3%	12.0%	10.8%	3.2%	3.6%	\$50,023
V. of Red Creek	14.2%	8.2%	14.8%	6.6%	26.8%	13.1%	8.7%	3.3%	4.4%	\$53,859
V. of Wolcott	17.5%	9.9%	12.3%	12.2%	19.1%	11.5%	8.6%	6.2%	2.7%	\$46,979

Source: Esri BAO

The map below displays the median household income (MHI) of Wayne County's towns. In general, MHI is greater on the western border of the County, likely influenced by high-wage jobs in the Rochester MSA.



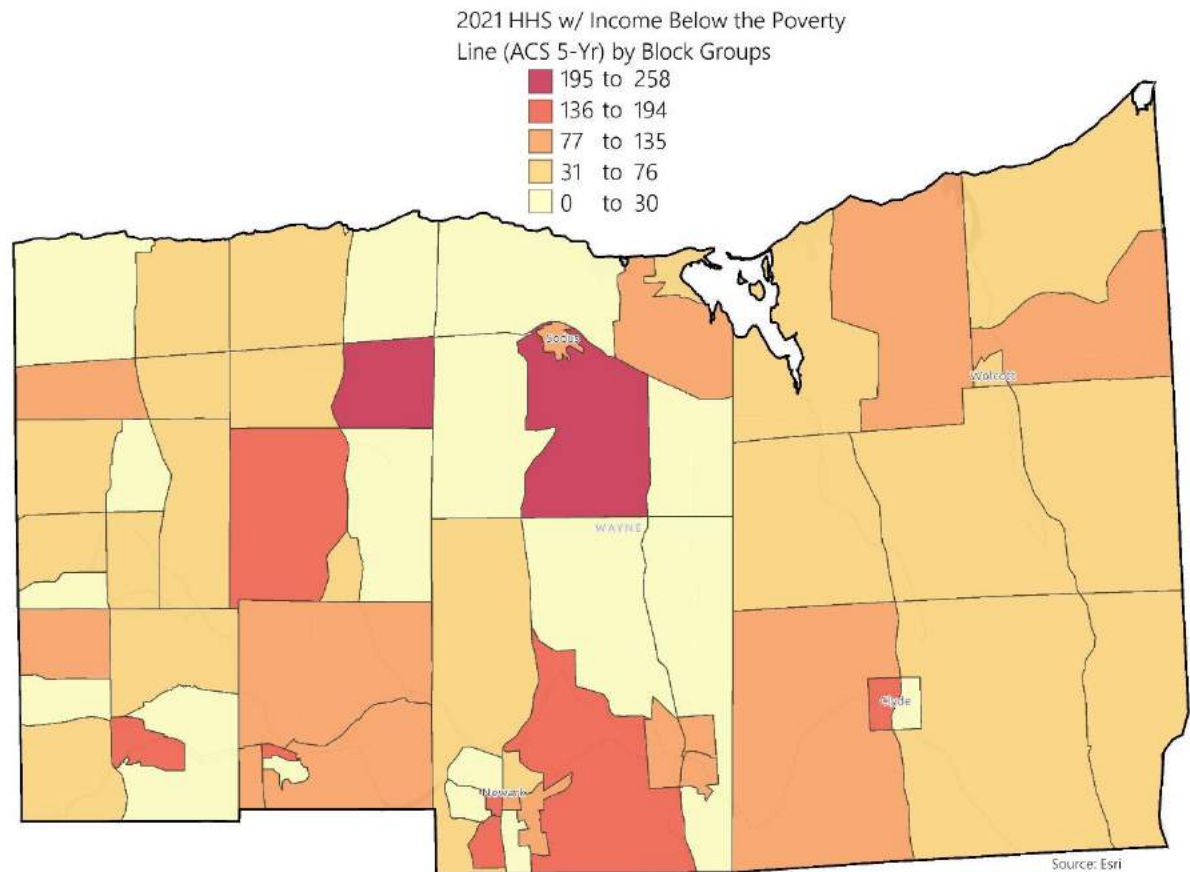
Households Below Poverty Line, 2021

Municipality	% of Total Households	Households Below Poverty Line
Galen	19.6%	317
<i>V. of Clyde</i>	21.4%	170
Wolcott	16.6%	296
<i>V. of Red Creek</i>	16.5%	38
<i>V. of Wolcott</i>	20.7%	133
Palmyra	15.9%	545
<i>V. of Palmyra</i>	17.0%	259
Sodus	15.2%	546
<i>V. of Sodus</i>	17.0%	138
<i>V. of Sodus Point</i>	5.7%	34
Lyons	14.9%	286
Huron	14.9%	131
Savannah	13.2%	78
Marion	12.0%	219
Rose	11.8%	92
Butler	11.2%	85
Arcadia	11.0%	617
<i>V. of Newark</i>	12.7%	471
Wayne County	11.0%	4,096
Williamson	9.9%	271
Macedon	8.1%	299
Walworth	4.3%	159
Ontario	3.5%	155

Source: Esri BAO

Poverty

The percentage of total households living below the poverty line ranges from 3.5% to 21.4%. Towns on the western border of the County have less than 10% of households living below the poverty line. Villages tend to have higher poverty rates than their respective towns. Again, the Villages of Sodus Point and Red Creek are the exceptions. Sodus Point has a poverty rate of 5.7%, among the lowest in the County, compared to 15.2% in the Town of Sodus.



Median Age

The median age of the County is estimated at 4 years old. Median age has risen in all of the Wayne County Towns over the last ten years. However, the median age in the Village of Clyde has decreased slightly.

Villages tend to have a lower median age than their respect towns. The Villages of Newark, Clyde, Palmyra, and Red Creek are all 1-3 years younger than their respective towns, but the Villages of Sodus and Red Creek are both more than 5 years younger than their respective towns. Once again, the Village of Sodus Point is the outlier in that it has a median age that is 9 years older than the Town of Sodus.

55+ Population

Municipality	2022	2027	2022 - 2027
Huron	43.2%	44.3%	2.5%
Sodus	38.8%	40.6%	4.6%
Williamson	38.1%	40.0%	5.0%
Arcadia	37.5%	38.5%	2.7%
Rose	36.9%	39.8%	7.9%
Ontario	36.4%	38.9%	6.9%
Wayne County	35.6%	37.3%	4.8%
Lyons	35.5%	36.0%	1.4%
Palmyra	35.3%	36.4%	3.1%
Marion	35.1%	38.2%	8.8%
Wolcott	35.1%	36.8%	4.8%
Macedon	33.8%	35.2%	4.1%
Butler	33.2%	34.7%	4.5%
Savannah	33.0%	34.0%	3.0%
Galen	32.3%	33.4%	3.4%
Walworth	30.6%	33.7%	10.1%

Source: Esri BAO

55+ Population

In each Town and the County, over 30% of the population is currently over 55 years old. In the Town of Huron, nearly half of the population is over 55. Through 2027, the share of the population over the age of 55 is projected to increase across the board. This has both workforce and housing implications.

Median Age

	2010 Median Age	2022 Median Age	2010 - 2022 Growth
Huron	46.3	49.7	7.3%
Sodus	43.9	46.4	5.7%
V. of Sodus	36.9	38.9	5.4%
V. of Sodus Point	51.8	55.4	6.9%
Williamson	43.1	46.1	7.0%
Ontario	42.1	45.6	8.3%
Marion	41.0	44.5	8.5%
Rose	42.5	44.3	4.2%
Palmyra	41.8	44.2	5.7%
V. of Palmyra	39.8	42.1	5.8%
Arcadia	42.4	44.2	4.2%
V. of Newark	40.2	42.0	4.5%
Wayne County	41.5	44.0	6.0%
Lyons	41.6	43.4	4.3%
Macedon	41.0	42.9	4.6%
Wolcott	39.9	42.8	7.3%
V. of Red Creek	38.4	41.5	8.1%
V. of Wolcott	37.1	37.7	1.6%
Walworth	39.3	41.7	6.1%
Butler	38.8	40.9	5.4%
Savannah	39.4	40.9	3.8%
Galen	39.1	39.9	2.0%
V. of Clyde	37.0	36.9	-0.3%

Source: Esri BAO

Households with One or More Persons with a Disability

Municipality	Households with 1+ Person(s) with Disability (%)	Households with 1+ Person(s) with Disability (#)
Wolcott	46.2%	768
Lyons	35.4%	797
Savannah	34.2%	216
Butler	34.2%	243
Galen	33.6%	556
Rose	31.7%	294
Huron	31.7%	254
Williamson	31.5%	887
Palmyra	30.4%	969
Arcadia	29.9%	1762
Wayne County	29.1%	10,843
Ontario	26.8%	1130
Sodus	26.4%	875
Marion	25.9%	484
Walworth	22.5%	793
Macedon	21.2%	815

Source: Esri BAO

Population with Disabilities

Nearly one in three households in the County include at least one person with a disability. In the Town of Wolcott nearly half of the households have a person with a disability. This is particularly notable because Wolcott has a below average proportion of older adults (35.1% over the age of 55 versus 35.6% at the county level), indicating that the disabilities experienced in the Town of Wolcott are not driven primarily by an aging population.

Single Headed Households

The table below shows the count of single-headed households with children among the County and Towns. Roughly 6% of households in Wayne County are headed by a single parent. In the Town of Galen, nearly 1 in 10 households are headed by a single parent. There is a clear gender disparity among single headed households. On average, across the Towns, there are three single mothers for every single father. In the Town of Palmyra, there are eleven single mothers for every single father.

Single Headed Households

Municipality	Male householder, no spouse present, family household	Female householder, no spouse present, family household	Total single headed households	% of total households, single headed
Galen	45	97	142	9.4%
Williamson	87	140	227	8.4%
Savannah	15	34	49	8.0%
Arcadia	62	393	455	7.9%
Wolcott	52	86	138	7.6%
Marion	17	101	118	6.5%
Lyons	39	99	138	6.5%
Wayne County	639	1,458	2,097	5.7%
Macedon	79	122	201	5.6%
Palmyra	14	157	171	5.2%
Sodus	89	46	135	4.2%
Ontario	67	85	152	3.4%
Rose	27	-	27	3.4%
Walworth	26	84	110	3.1%
Huron	17	6	23	2.8%
Butler	3	8	11	1.5%

Source: ACS 2020 5-year estimates, US Census Bureau

Migrant and Farm Labor

Agriculture is a vital industry in Wayne County, both economically and culturally. However, interviews have indicated that there are critical housing needs within this industry. While it is difficult to quantify this need in a comprehensive way, some data is available.

H2A Workers

The H2A visa program is increasingly used by the agricultural industry to source migrant labor. Farms utilizing H2A labor must provide housing to workers, and that housing is subject to inspection to ensure safe and humane living conditions. There is substantial data available in relation to this program.

According to 2022 Q3 H2A disclosure data (US Department of Labor, Office of Foreign Labor Certification), there are 54 employers in Wayne County with active H2A cases/certifications. The table to the right shows the locations of these employers and the total number of H2A workers they are certified to employ.

The active H2A employers offer a total of 57 housing sites. The style and occupancy of that housing varies, including from mobile homes rated for 4-6 occupants to barracks style housing rated for up to 28 occupants. For this reason, housing availability is not the primary concern in relation to H2A workers. Rather, housing quality would be the focus of any housing needs related to this population of workers. Of the 57 housing sites, 5 are noted as not being in local compliance, 2 are noted as not being in State compliance, and 6 are noted as not being in federal compliance; although the nature of the compliance issues is not specified in the data.

H2A Farm Labor - 2022 Q3

Municipality	H2A employers	Certified Workers	% of County Total Workers
Wayne County	54	806	100.0%
Williamson	18	165	20.5%
Sodus	7	95	11.8%
Savannah	1	76	9.4%
Rose	1	42	5.2%
Galen	2	23	2.9%
Macedon	2	23	2.9%
Wolcott	11	20	2.5%
Arcadia	2	17	2.1%
Marion	5	13	1.6%
Lyons	1	8	1.0%
Walworth	2	7	0.9%
Ontario	2	3	0.4%
Butler	-	-	0.0%
Huron	-	-	0.0%
Palmyra	-	-	0.0%

Source: US Department of Labor Office of Foreign Labor Certification, 2022 Q3 H2A Disclosure Data

Non-H2A Farm Labor

This category of farm workers includes non-H2A migrant workers, local residents (including individuals who were previously migrant workers and have permanently relocated to the area), and year-round farm workers. This population is harder to account for precisely, and farm employers are not required to provide housing for them. When housing is provided, it is not regulated and inspected in the same way. However, the New York State Department of Health regulates and inspects migrant housing occupied by five or more people.

Interviews have indicated that this group of workers is more likely to have family members residing with them, and is more likely to face housing insecurity. In particular, these workers who are housed by their employers become both unemployed and homeless if they lose that employment for any reason.

The table to the right shows quarterly employment in select agricultural industries from 2020 Q1 through 2022 Q1 according to the Census Quarterly Workforce Indicators program. H2A workers are not included in this data as they are not covered by New York State Unemployment Insurance. It is worth noting that the Farm Laborers Fair Labor Practices Act partially went into effect January 1, 2020. This regulatory change, along with the pandemic and long-standing workforce recruitment challenges, are likely impacting and shifting hiring practices for farms across New York. Furthermore, as of January 1, 2020, as part of the Farm Laborers Fair Practices Act, employers became liable for unemployment insurance contributions for many agricultural workers, including seasonal ones. This should, in theory, improve the data associated with local agricultural workers. That being said, this segment of the workforce has historically been undercounted and that is likely still the case.

According to the data available and information from interviews, it is clear that much of the seasonality in agriculture is within the crop production industry. Animal production has more stable employment throughout the year. Annual 2021 and 2022 Q3 H2A disclosures show similar seasonality, with most of those seasonal workers also supporting the crop production industry. While this information provides a number of insights, there are two housing-related takeaways that should be further explored to fully understand any gaps that exist: 1) housing insecurity for these workers likely spikes in Q1 of each year, unless the farmworkers are moving on to other locations for work, and 2) the extent and condition of farm-provided housing in the animal production industry, as well as the willingness of these farms to participate in programming to improve/increase housing (if needed).

Wayne County Agricultural Employment - Quarterly

Quarter	Crop Production	Animal Production and Aquaculture	Support Activities for Agriculture and Forestry	Total
2022 Q1	734	484	126	1,344
2021 Q4	1,523	483	118	2,124
2021 Q3	866	474	105	1,445
2021 Q2	757	483	115	1,355
2021 Q1	741	473	121	1,335
2020 Q4	1,643	457	117	2,217
2020 Q3	889	450	102	1,441
2020 Q2	781	449	111	1,341
2020 Q1	770	429	119	1,318

Source: Census Quarterly Workforce Indicators

Conclusion

The demographic analysis reveals some distinct trends to consider when approaching housing related challenges:

- 1) In 2022, roughly 50% of the Wayne County population lived in the six most western towns in the County. These towns also have the highest median household incomes, accounting for six of the seven counties with median household incomes above the County-wide median.
- 2) The Towns of Huron and Rose are going to see the greatest percentage increase in the number of households in their communities. While the towns in the Western portion of the County may see more pressure coming from the Rochester area, there will likely be increased housing demand in these other areas as well.
- 3) Residents of villages tend to be younger and have lower incomes than the towns of which they are a part. The Village of Sodus Point in particular is different, with higher incomes and a markedly higher median age than the Town of Sodus.
- 4) The Town of Galen has the highest poverty rate and also the highest concentration of single headed households in the County. Interviews indicated that there are limited temporary and emergency housing options for families, so a more in-depth exploration of this challenge in Galen specifically may be helpful.
- 5) Median age and the proportion of the population over age 55 are projected to continue rising throughout the County, indicating that they may be increased demand for smaller and managed properties that allow seniors to age in place. The towns with the highest concentration of 55+ residents are primarily along the norther border of the County.
- 6) Housing for farm workers presents its own challenges. Migrant H2A workers are guaranteed housing, but there is more exploration needed into whether, to what extent, and where that housing is in need of upgrades. Resident, year-round farm workers are sometimes offered housing by their employer, but it is not guaranteed and that housing is lost if the worker loses his/her job for any reason. There may be an opportunity to assist these workers in accessing more stable housing within the community, including home ownership. The agricultural economy of the region is large enough to justify a stand-alone study to identify the intricacies of farmworker housing needs, as well as potential programs to address those needs. The California Institute of Rural Studies completed a 2018 Farmworker Housing Study and Action Plan⁵ that included a multi-jurisdictional, multi-organizational effort to address farmworker housing needs. This could be a template for examining the such issues in Western New York.

⁵ The 2018 Farmworker Housing Study and Action Plan can be reviewed at the following link:

https://www.cityofsalinas.org/sites/default/files/departments_files/community_development_files/farmworker_housing_study.saslinas-pajaro.june_15-2018.complete.pdf



Chapter 5: Housing Market Snapshot

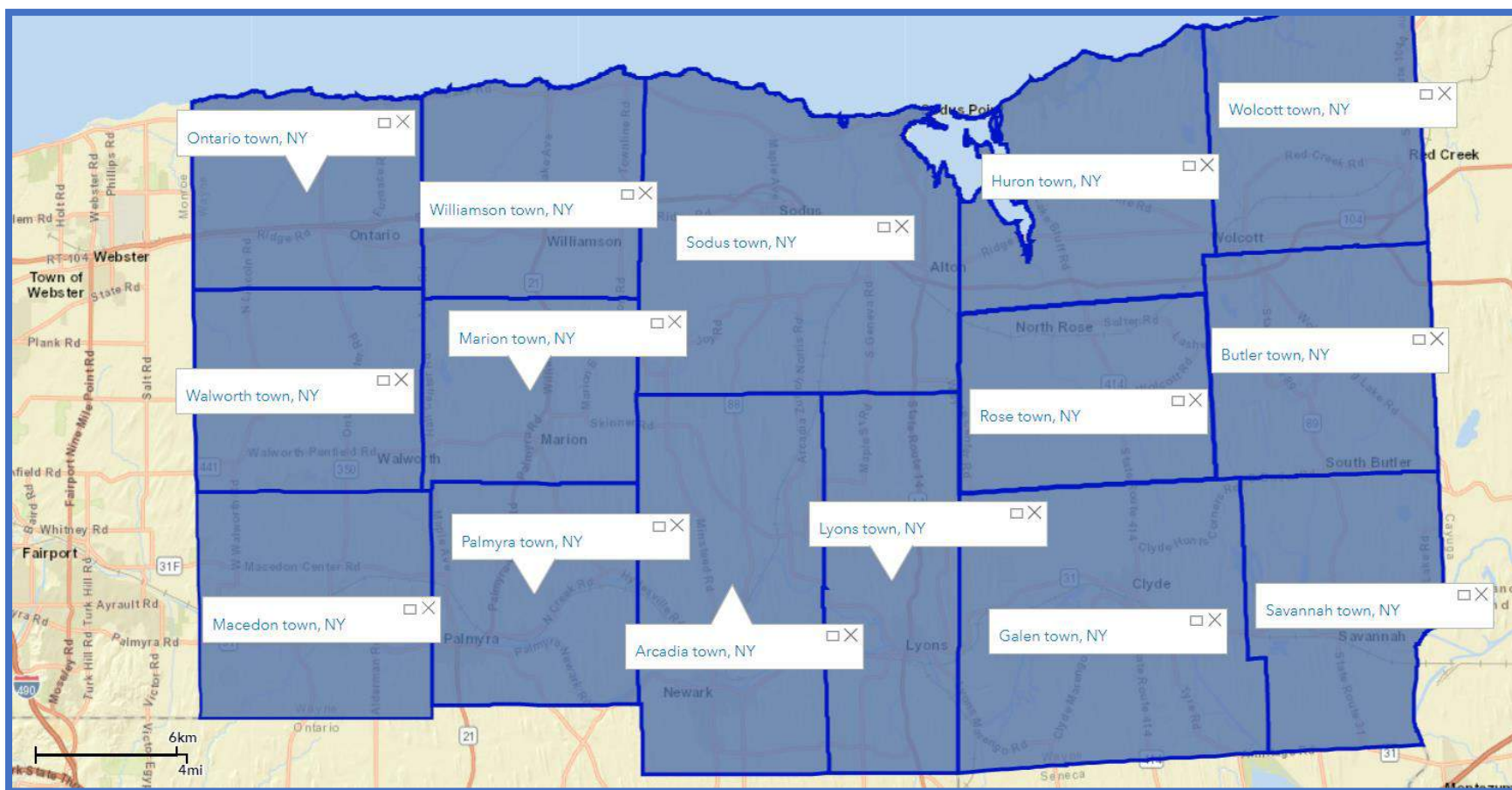
PREPARED BY

MRB | *group*

November 2022

Market Area

The following housing market overview is a town-level analysis of Wayne County. We include data for the County's 15 Towns, as pictured below, as well as, the County as a whole.



Housing Units

- There are an estimated 36,585 housing units in Wayne County.
- One in four County housing units are in either the Town of Arcadia or the Town of Ontario.
- Most Towns have over 60% owner-occupied units, Walworth having the highest percentage of owner-occupied units at 89.1%. The two exceptions are Wolcott (57.9% owner-occupied) and Huron (40.3% owner occupied). Both of these Towns are located on Lake Ontario, so these lower percentages of owner-occupation are likely attributable to seasonal/second-home ownership, especially in Huron.

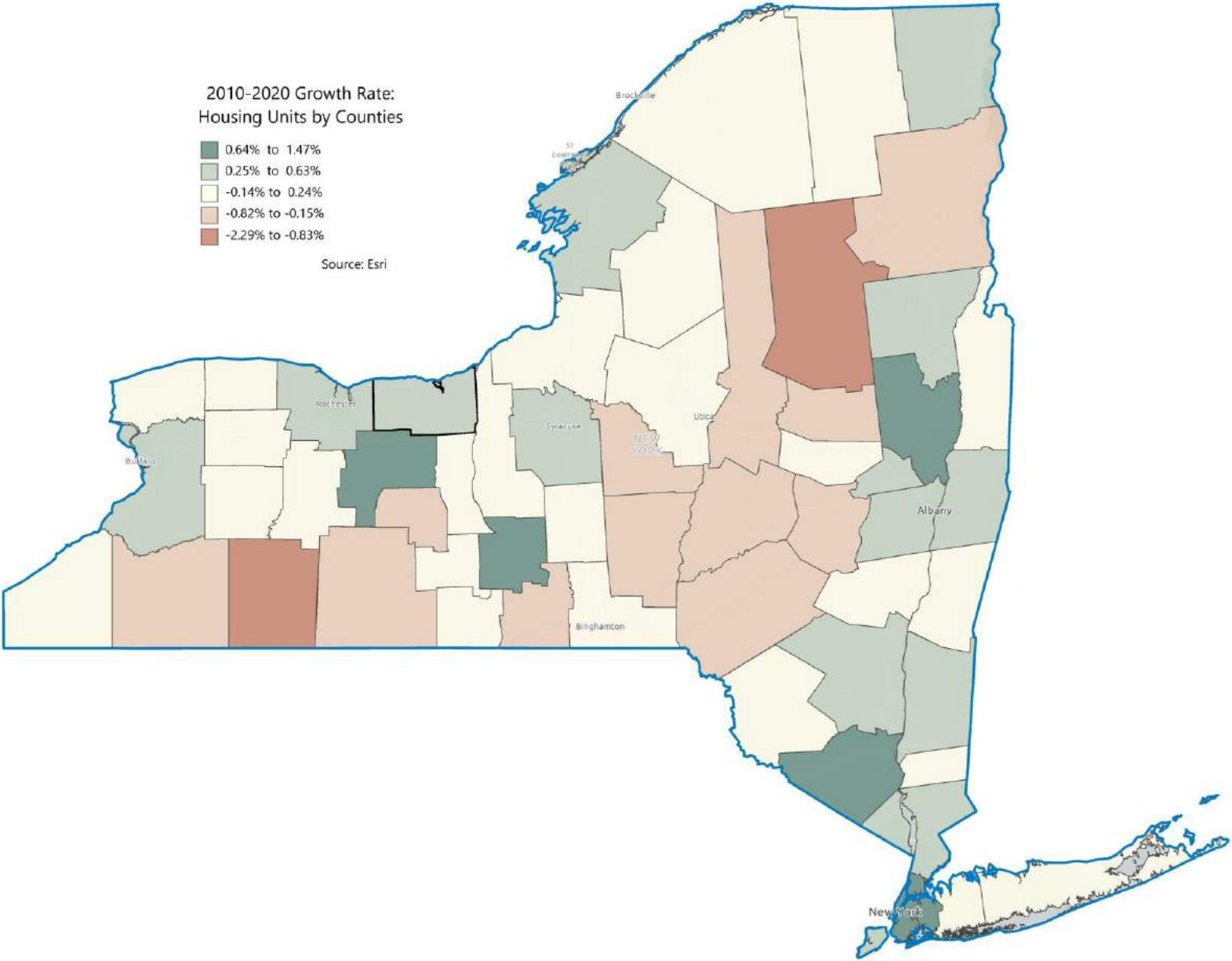
Total Housing Units - 2022

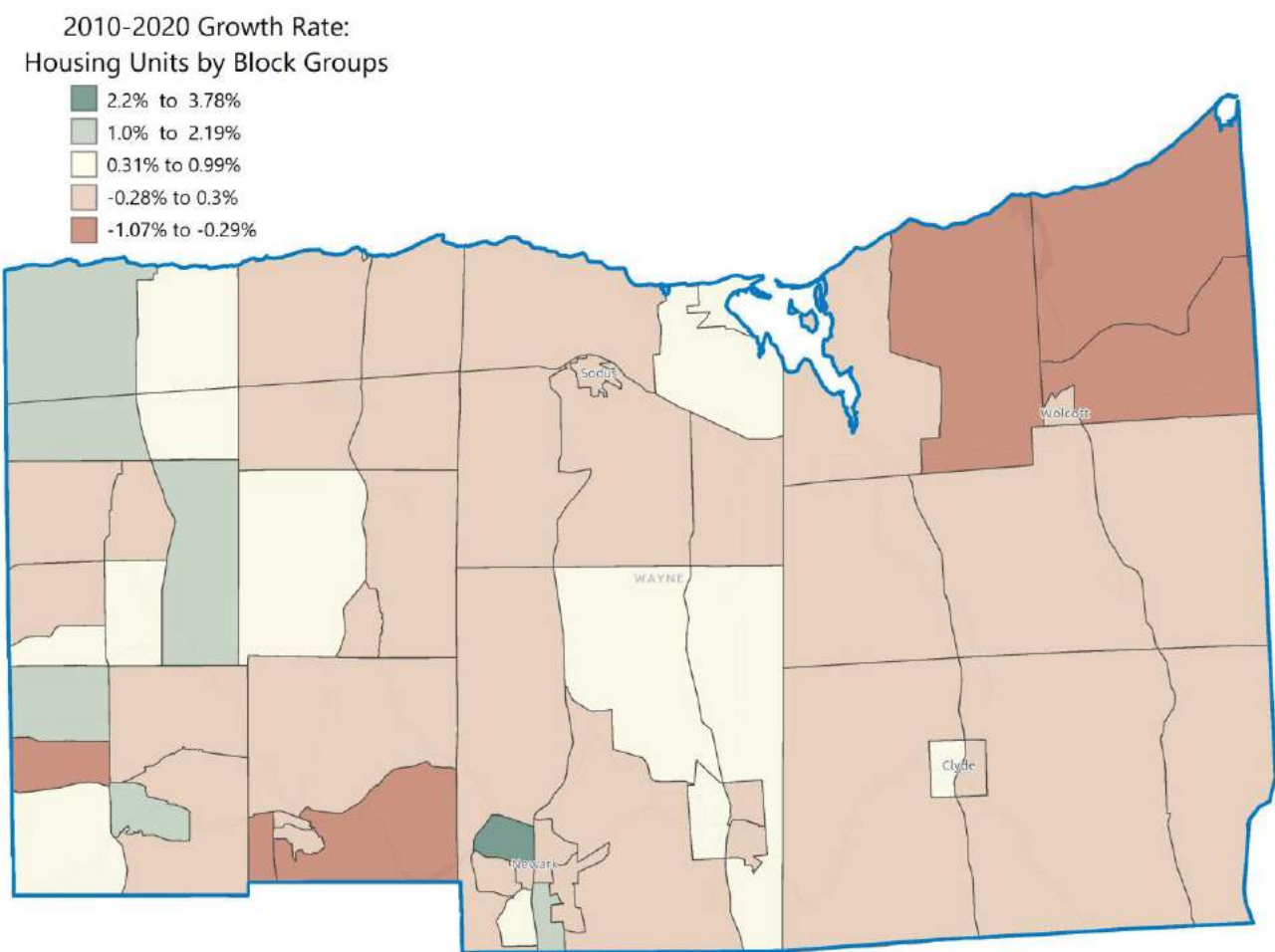
Municipality	Total Housing Units	% of Total	Owner-Occupied	Renter-Occupied
Wayne County	36,585	100.0%	69.9%	20.1%
Arcadia	5,783	15.8%	63.0%	31.5%
Ontario	3,960	10.8%	78.7%	16.2%
Macedon	3,650	10.0%	77.4%	18.1%
Walworth	3,356	9.2%	89.1%	8.0%
Sodus	3,325	9.1%	64.4%	17.5%
Palmyra	3,255	8.9%	67.2%	27.4%
Williamson	2,773	7.6%	74.4%	16.8%
Lyons	2,215	6.1%	61.2%	28.5%
Marion	1,814	5.0%	81.6%	14.7%
Wolcott	1,732	4.7%	57.9%	20.1%
Galen	1,600	4.4%	69.5%	21.6%
Rose	896	2.4%	78.4%	16.0%
Huron	855	2.3%	40.3%	9.8%
Butler	731	2.0%	79.9%	15.0%
Savannah	640	1.7%	76.9%	16.5%

Source: Esri BAO

Housing Unit Growth 2010-2020

The number of housing units in Wayne County grew by .29% from 2010 to 2020. This is the 21st fastest growth of all 62 counties in New York State, putting Wayne County just about in the top third. However, a few areas account for most of the growth within the Wayne County. The maps on the following pages show the housing unit growth rates for counties in New York State and block groups in Wayne County.

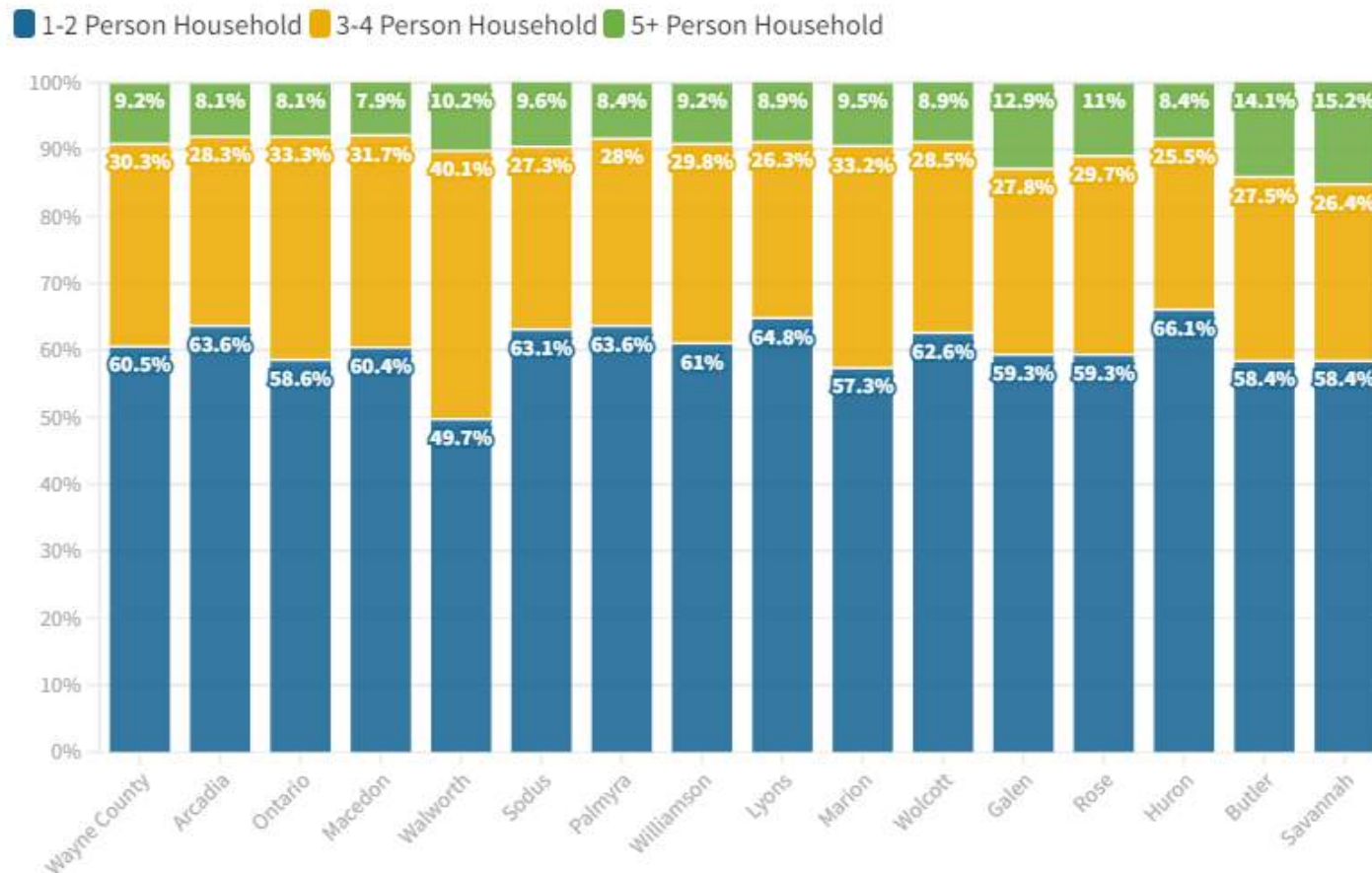




Average Household Size

In the majority of Towns, and the County as a whole, roughly 60% of households are 1- or 2-person households. In general, Towns on the eastern side of the County have larger households in comparison to the rest of the County.

Average Household Size is 2.38 in Wayne County Household Size Distribution



Median Home Value

- Median home values in the Towns of Huron, Ontario, Walworth, Macedon, and Williamson are greater than the County as a whole. These Towns are along the western and northern boundaries of the county, so are likely influenced by the Rochester MSA and frontage on Lake Ontario.
- Over the next five years, median home value is projected to grow in each of the Towns and the County as a whole.
- Lyons, the county seat, has the lowest median home value and the second highest rate of renter-occupied units.

Median Home Value

Municipality	2022	2027	2022 - 2027 #	2022 - 2027 %
Huron	\$255,496	\$270,926	\$15,430	6.0%
Ontario	\$201,708	\$219,204	\$17,496	8.7%
Walworth	\$197,072	\$210,859	\$13,787	7.0%
Macedon	\$178,074	\$191,933	\$13,859	7.8%
Williamson	\$176,023	\$197,595	\$21,572	12.3%
Wayne County	\$149,194	\$168,124	\$18,930	12.7%
Sodus	\$140,180	\$167,347	\$27,167	19.4%
Marion	\$134,922	\$142,943	\$8,021	5.9%
Palmyra	\$131,303	\$141,744	\$10,441	8.0%
Arcadia	\$119,424	\$128,606	\$9,182	7.7%
Wolcott	\$116,591	\$146,123	\$29,532	25.3%
Butler	\$112,597	\$127,155	\$14,558	12.9%
Savannah	\$110,321	\$122,794	\$12,473	11.3%
Rose	\$110,077	\$121,858	\$11,781	10.7%
Galen	\$98,043	\$109,362	\$11,319	11.5%
Lyons	\$95,902	\$100,486	\$4,584	4.8%

Source: Esri BAO

NYSAR – Market for Single Family Homes

The following tables show activity in the single-family home market at the County-level for the Genesee / Finger Lakes REDC region over a one- and five-year period. This data is sourced from the New York State Association of Realtors (NYSAR). We also include similar data for the Rochester MSA as an aggregate for purposes of comparison.⁶

Compared to five years ago, the supply of houses for sale is dramatically less in all counties except Orleans. In Wayne County, now there are 21% fewer new listings. Similarly, the number of closed sales, homes for sale, and time on the market have all substantially decreased compared to five years ago. The median sale price of a home in Wayne County is 53.3% higher than it was in 2017. Across all geographies homes prices have increased from 20.6% - 70.2%. In neighboring Monroe County, the median sale price increased 60.5% but new listings decreased 23.9% and months supply decreased 60%. Increasing costs and decreasing supply in Monroe County is likely pushing demand into western Wayne County due to its proximity to the Rochester employment area.

Real Estate Activity by County, 2017 - 2022

	New Listings			Closed Sales			Median Sales Price			Homes for Sale			Months Supply		
	Q2 2017	Q2 2022	+/-	Q2 2017	Q2 2022	+/-	Q2 2017	Q2 2022	+/-	Q2 2017	Q2 2022	+/-	Q2 2017	Q2 2022	+/-
Genesee	170	165	(2.9%)	116	105	(9.5%)	\$101,500	\$172,778	70.2%	121	43	(64.5%)	3.2	1	(68.8%)
Livingston	262	202	(22.9%)	146	92	(37.0%)	\$128,780	\$190,500	47.9%	206	74	(64.1%)	4.5	1.7	(62.2%)
Monroe	3,786	2,882	(23.9%)	2,943	1,880	(36.1%)	\$138,500	\$222,300	60.5%	1,531	555	(63.7%)	2	0.8	(60.0%)
Ontario	660	514	(22.1%)	336	333	(0.9%)	\$155,000	\$255,000	64.5%	488	171	(65.0%)	4.7	1.5	(68.1%)
Orleans	156	161	3.2%	84	105	25.0%	\$79,000	\$145,000	83.5%	127	60	(52.8%)	3.8	1.9	(50.0%)
Seneca	169	115	(32.0%)	74	65	(12.2%)	\$112,150	\$145,000	29.3%	156	42	(73.1%)	5.8	1.7	(70.7%)
Wayne	456	361	(20.8%)	275	214	(22.2%)	\$127,200	\$195,000	53.3%	329	97	(70.5%)	3.8	1.2	(68.4%)
Wyoming	168	124	(26.2%)	71	76	7.0%	\$102,820	\$172,000	67.3%	151	51	(66.2%)	5.9	1.8	(69.5%)
Yates	141	94	(33.3%)	69	42	(39.1%)	\$143,000	\$172,500	20.6%	142	39	(72.5%)	6.7	2	(70.1%)
Rochester MSA	5,461	4,214	(22.8%)	3,853	2,666	(30.8%)	\$133,640	\$192,750	44.2%	2,823	996	(64.7%)	25.5	9.1	(64.3%)

Source: New York State Association of Realtors (NYSAR)

⁶ The Rochester MSA includes Livingston, Monroe, Ontario, Orleans, Wayne and Yates Counties.
Wayne County Housing Needs Assessment & Market Analysis

Compared to just a year ago, the data on single-family homes tells the same story of dwindling supply, increasing prices, and strong demand for housing in Wayne County. In the last year, the median sale price for homes has increased 11.4% in Wayne County, outpacing high inflation. The time homes spend on the market remains unchanged year-over-year, but is one of the shortest in the region.

Real Estate Activity by County, 2021 - 2022

	New Listings			Closed Sales			Median Sales Price			Homes for Sale			Months Supply		
	Q2 2021	Q2 2022	+/-	Q2 2021	Q2 2022	+/-	Q2 2021	Q2 2022	+/-	Q2 2021	Q2 2022	+/-	Q2 2021	Q2 2022	+/-
Genesee	189	165	(12.7%)	134	105	(21.6%)	\$153,950	\$172,778	12.2%	54	43	(20.4%)	1.2	1	(16.7%)
Livingston	192	202	5.2%	115	92	(20.0%)	\$160,000	\$190,500	19.1%	61	74	21.3%	1.3	1.7	30.8%
Monroe	3,108	2,882	(7.3%)	2,102	1,880	(10.6%)	\$200,011	\$222,300	11.1%	514	555	8.0%	0.7	0.8	14.3%
Ontario	489	514	5.1%	322	333	3.4%	\$205,000	\$255,000	24.4%	194	171	(11.9%)	1.7	1.5	(11.8%)
Orleans	128	161	25.8%	93	105	12.9%	\$139,900	\$145,000	3.6%	36	60	66.7%	1	1.9	90.0%
Seneca	107	115	7.5%	62	65	4.8%	\$133,450	\$145,000	8.7%	40	42	5.0%	1.5	1.7	13.3%
Wayne	392	361	(7.9%)	233	214	(8.2%)	\$175,000	\$195,000	11.4%	112	97	(13.4%)	1.2	1.2	0.0%
Wyoming	128	124	(3.1%)	66	76	15.2%	\$150,000	\$172,000	14.7%	45	51	13.3%	1.5	1.8	20.0%
Yates	94	94	0.0%	52	42	(19.2%)	\$181,000	\$172,500	(4.7%)	44	39	(11.4%)	1.8	2	11.1%
Rochester MSA	4,403	4,214	(4.3%)	2,917	2,666	(8.6%)	\$178,000	\$192,750	8.3%	961	996	3.6%	7.7	9.1	18.2%

Source: New York State Association of Realtors (NYSAR)

The chart to the right shows real estate activity in Wayne County from 2017 through 2022. Median sale price has consistently increased over time, while homes for sale, new listings, and months supply have consistently declined. On the contrary, closed sales have followed a relatively steady pattern from year to year, oscillating from 900-970 one year to 1000-1060 the following. There are a number of factors that are likely to impact housing markets over the next 5 years:

Real Estate Activity for Wayne County, 2017-2022

	New Listings	Closed Sales	Median Sales Price	Homes for Sale	Months Supply
2017		1,058	\$124,900		
2018	1,361	961	\$135,000	230	2.8
2019	1,290	1,014	\$137,500	218	2.6
2020	1,135	965	\$149,000	95	1.1
2021	1,124	1,022	\$172,500	76	0.9
2022	1,023	906	\$185,000	61	0.8

Source: New York State Association of Realtors (NYSAR)

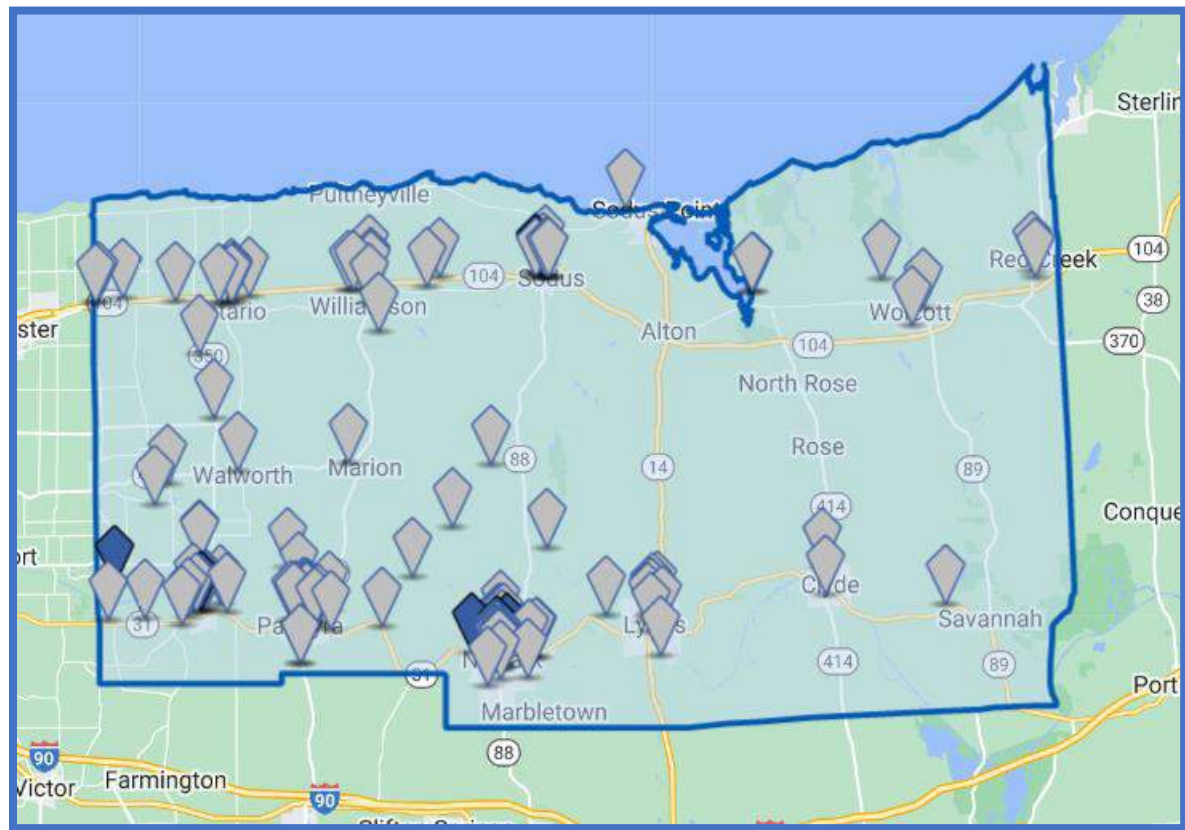
- 1) Availability – declining availability and increased demand are driving housing prices up. With months supply already near zero, it is likely that prices will continue to increase unless additional properties become available on the market.
- 2) Interest rates – increasing interest rates may slow demand compared to 2020 and 2021 levels.

- 3) Rochester employment market - continued expansion of the Rochester employment market will continue to drive demand, partially offsetting the impacts of rising interest rates.
- 4) Households – the number of households is the driver for housing demand. Unlike population, the number of households is projected to remain relatively steady.

Given these factors, it is likely that Wayne County will continue to see increased demand pressures unless new housing units are brought to the market.

CoStar Multifamily Real Estate – Wayne County

The following section examines multifamily residential real estate data from CoStar, an extensive database of commercial real estate data. The map below displays the location of multifamily properties in Wayne County that are captured in the CoStar database. The distribution of multifamily units in the County generally correlates with the population distribution. The majority of existing multifamily units are on the western half of the County.



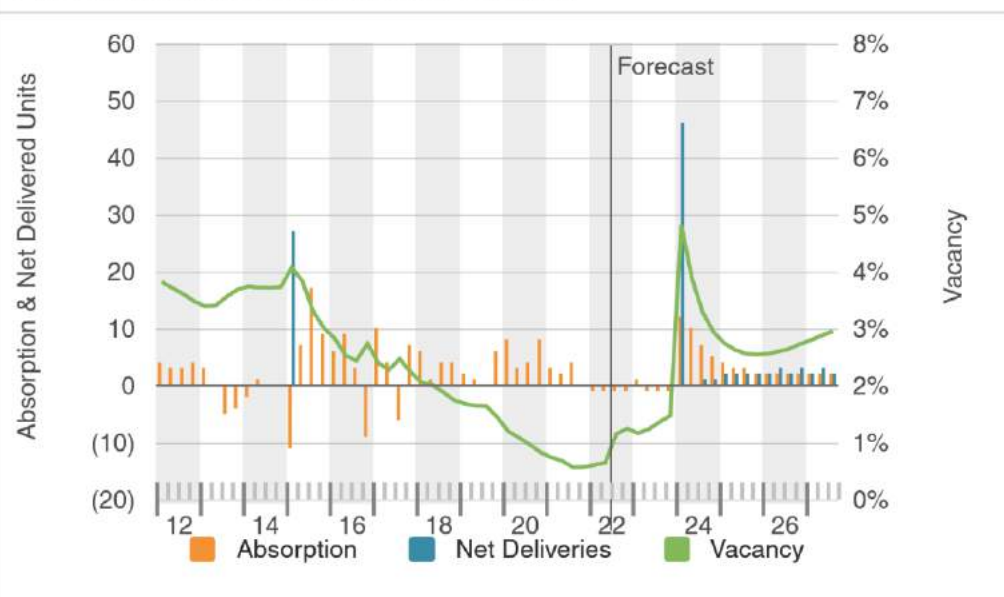
According to CoStar, as of Q3 2022 the County has approximately 3,110 units with an average monthly rent of \$912. The vacancy rate is estimated at a near historic low of 0.7% across all units. Currently there are 46 units under construction at Community Ridge in the Town of Ontario.

INVENTORY UNITS	UNDER CONSTRUCTION UNITS	12 MO ABSORPTION UNITS	VACANCY RATE	MARKET RENT/UNIT	MARKET SALE PRICE/UNIT	MARKET CAP RATE
3,110 +0%	46 -	0 -98.5%	0.7% +0.1%	\$912 +2.5%	\$157K +3.4%	7.3% +0.1%
Prior Period 3,110	Prior Period 0	Prior Period 17	Prior Period 0.6%	Prior Period \$889	Prior Period \$151K	Prior Period 7.2%

Demand for multifamily units has been strong over the last ten years with consistent positive net absorption. More units were leased than vacated in nearly every quarter since 2015, driving vacancy rates down. Over the last ten years, vacancy rates have persistently declined from roughly 4% to a historic low of 0.5% in 2021.

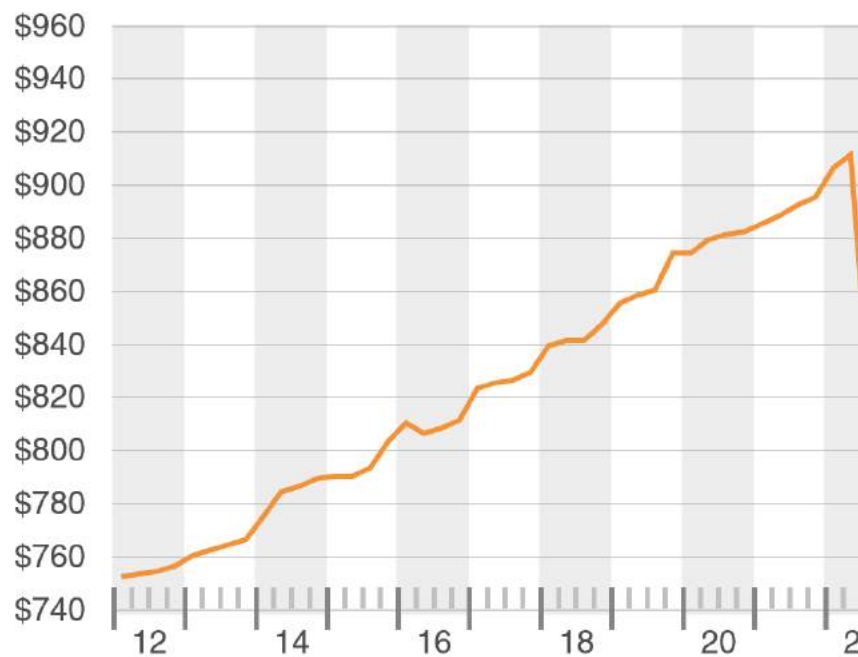
The supply of new multifamily units has remained relatively unchanged in the last ten years. 27 condos were delivered in 2015 in Sodus Point. There are 46 additional one- and two-bedroom units under construction in the Town of Ontario that are expected to be delivered by 2024.

Absorption, Net Deliveries & Vacancy

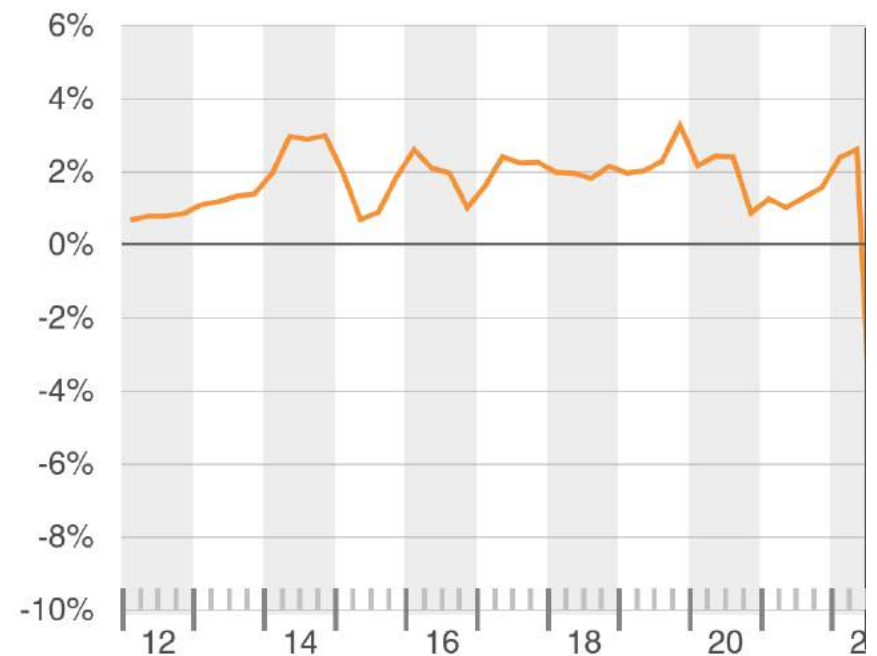


Current market rent is an estimated average of \$912 per month. Year-over-year market rent growth has consistently been positive each year over the last ten years.⁷

Market Asking Rent Per Unit



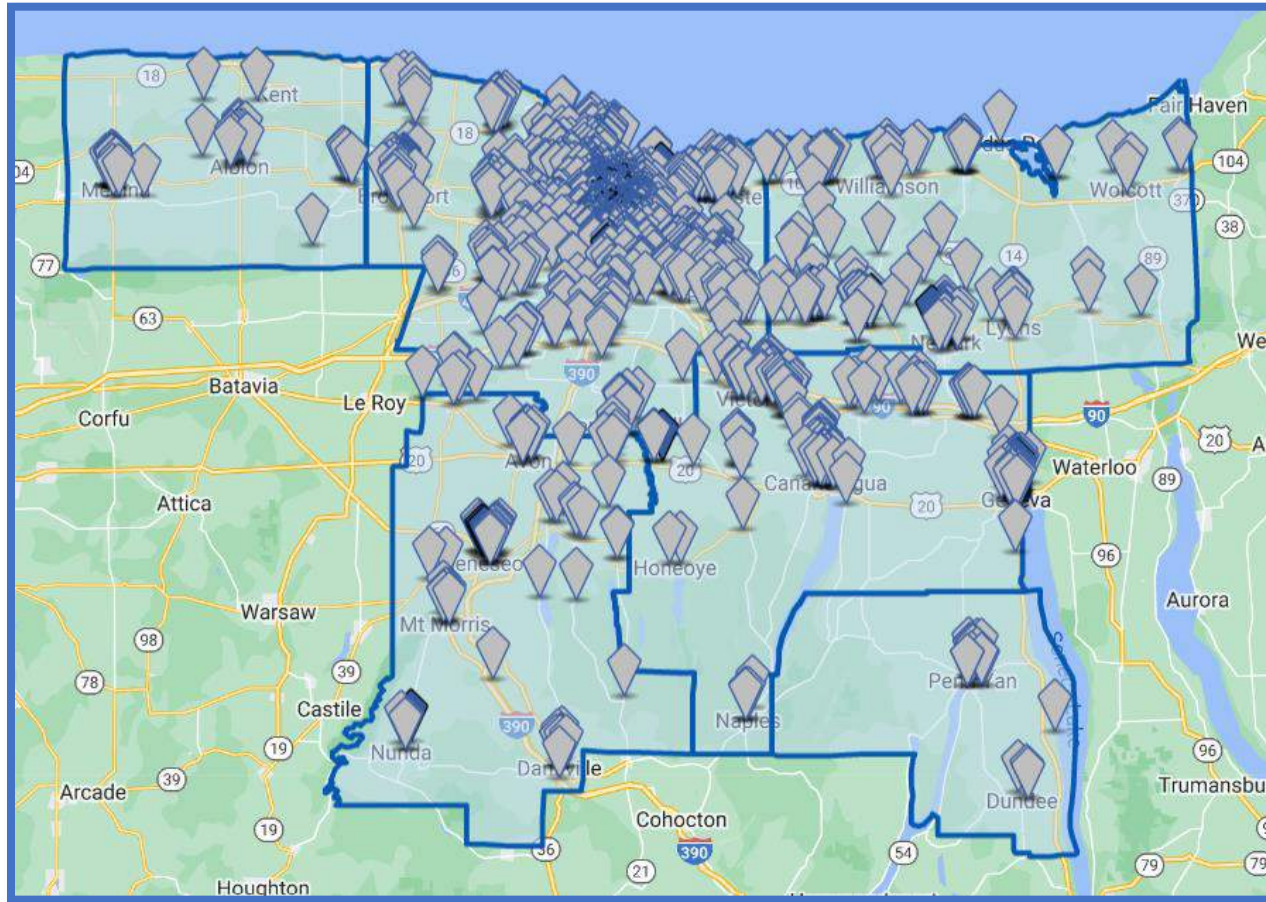
Market Rent Growth (YOY)



⁷ The market rent analysis ends at 2022 Q1 due to a data anomaly starting in 2022 Q2.
Wayne County Housing Needs Assessment & Market Analysis

CoStar Multifamily Real Estate – Rochester MSA

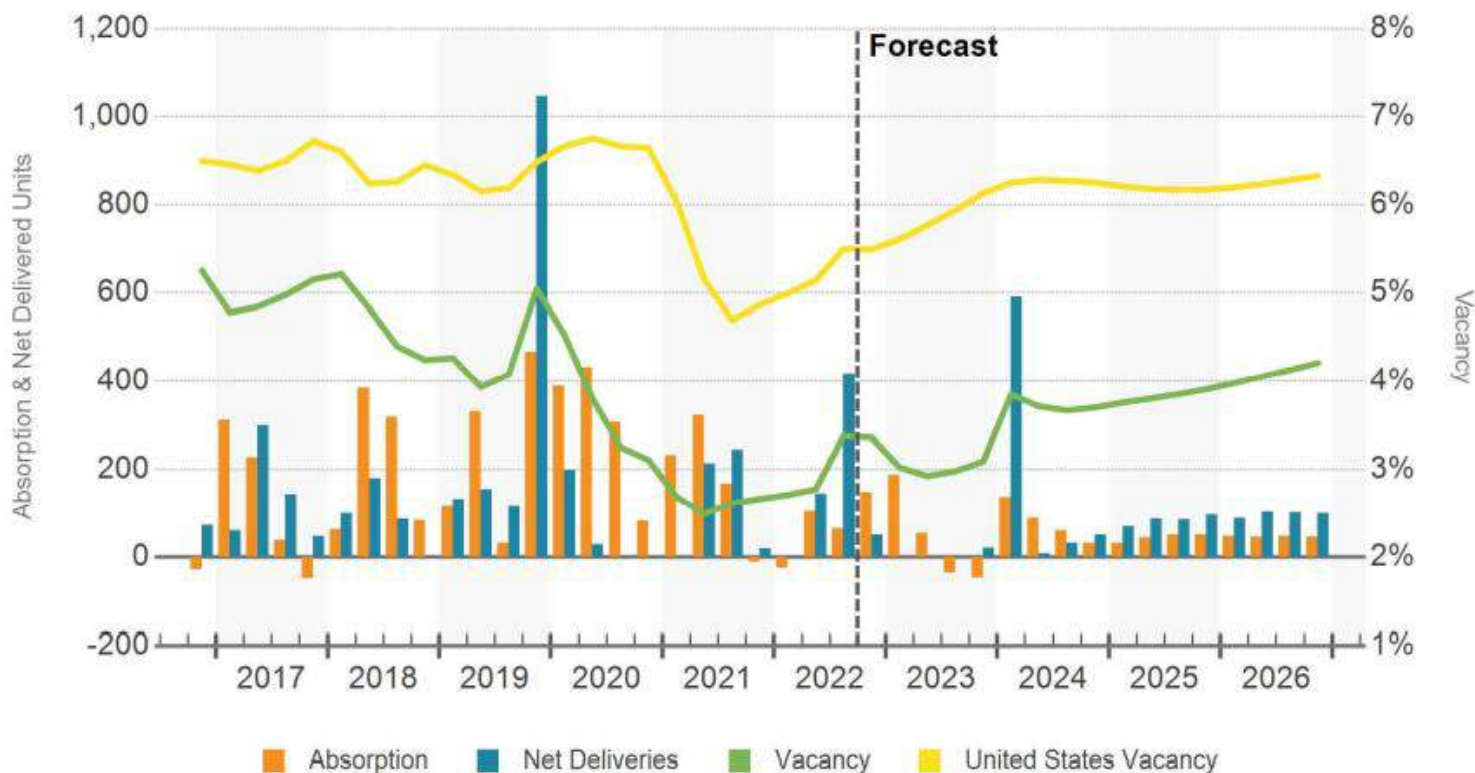
The Rochester MSA ("the MSA") is comprised of 5 counties – Livingston, Monroe, Ontario, Orleans, Wayne and Yates Counties. The map below displays the location of multifamily real estate for the MSA. Real estate trends in the MSA strongly influence real estate trends in Wayne County as the City of Rochester is a major employment center where many Wayne County residents commute to for work.



The multifamily real estate market in the MSA is currently tight with falling vacancy rates and exceptional rental growth year-over-year. Over 1,500 new residential units were constructed in the MSA from 2019. Despite a historical record number of deliveries in recent years, vacancy rates have fallen from 5% to the current estimate of 3.4%.

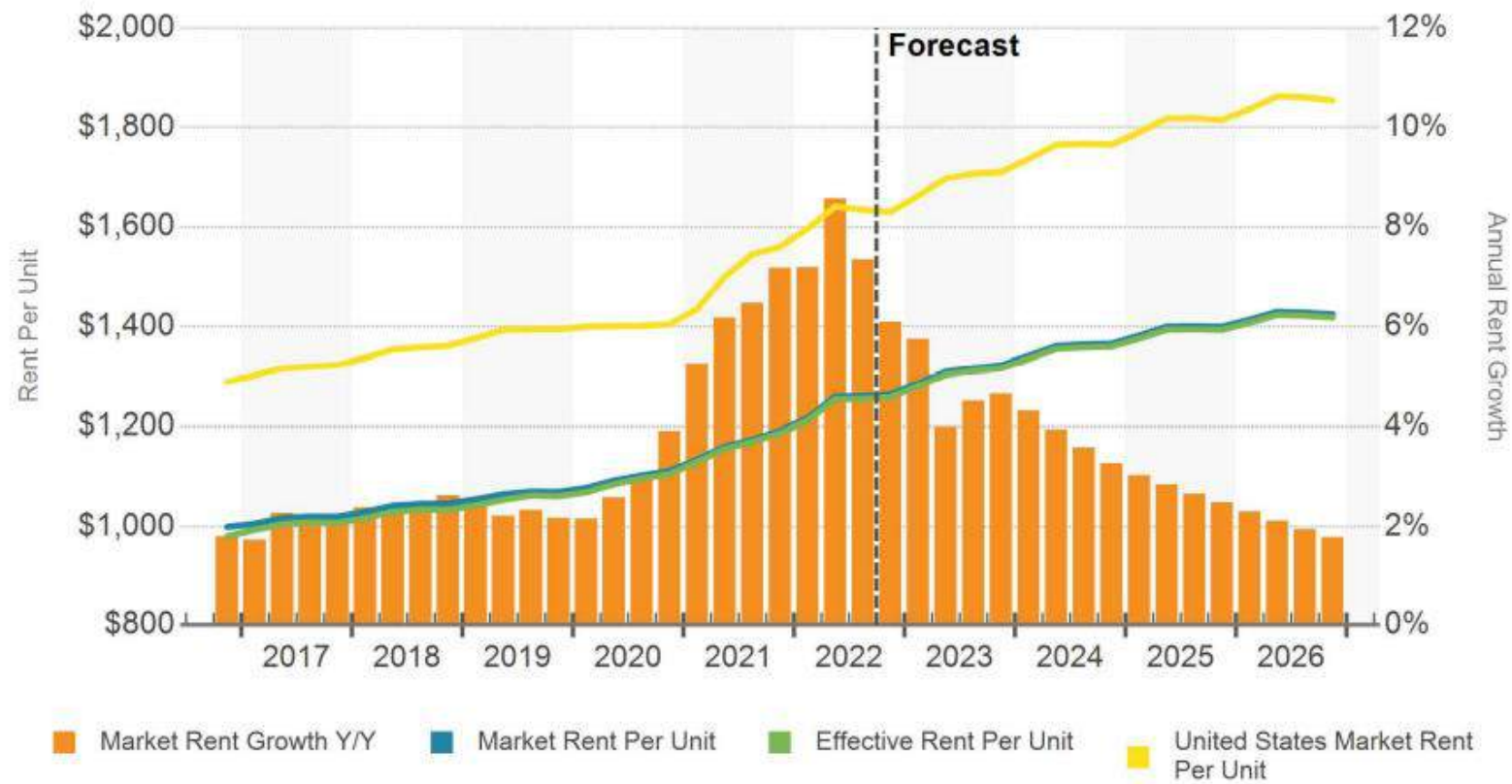
Currently there are 10 projects under construction in the MSA, that are expected to deliver an additional 1,100 units. Out of these ten projects, only one is located in the City of Rochester. Much of the projects under construction are located on or near the border between Wayne and Monroe Counties. Hathaway Meadows will add 239 market-rate units in the Town of Victor. Dunwood Green will deliver 175 units to the Town of Brighton.

ABSORPTION, NET DELIVERIES & VACANCY



Strong demand for additional multifamily units, coupled with near-record low vacancies have accelerated rent growth to 6.9%. Currently, the average market rent is estimated at \$1,258 in monthly rent, notably above market current market rent in Wayne County of \$912.

MARKET RENT PER UNIT & RENT GROWTH



Building Permits

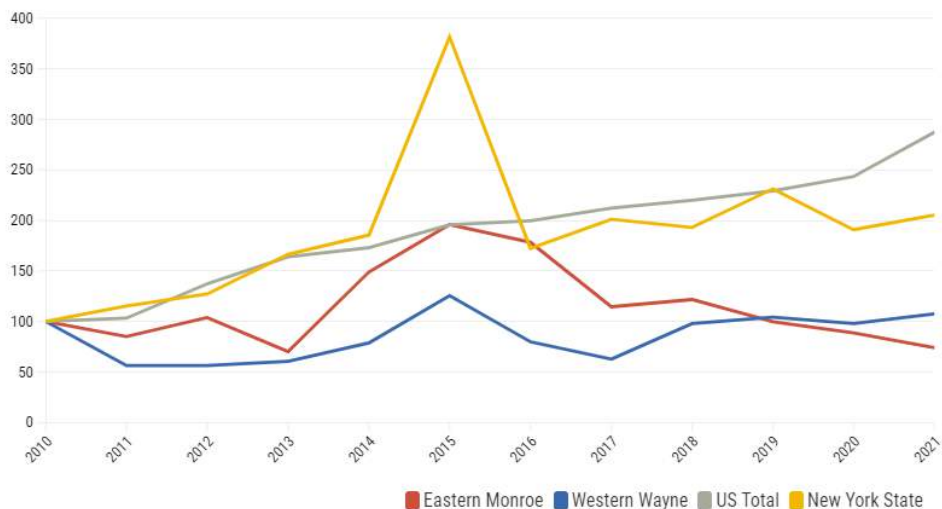
Building permit data shows trends in housing development over time. Wayne County as a whole has experienced a declining trend in residential building permits since the 1990s. Since a peak of 483 permits in 1994, there has been a generally downward trajectory reaching a low of 76 permits in 2013. However, since 2010 the trend has reversed slightly. While annual fluctuations still exist, the number of permits has stabilized and even shifted to a slightly upward trend. In 2021, there were 137 permits in Wayne County.

The Western Market Area of Wayne County has consistently accounted for more than 60% of the total permits in the county since 1992, ranging from 61.6% to 84.5% in any given year. Since 2010, 74% of permits in Wayne County were in the Western towns. To better understand the broader context associated with the trends in Western Wayne County, the permit data for that area was compared to data for New York State, the US, and Eastern Monroe County. The latter comparison is included due the local observation that the housing dynamics in Western Wayne County are influenced by the market in Rochester and Eastern Monroe County. The following graphs show permit data from 2010 to 2021 for each of the noted geographies, indexed to 2021 levels. It is important to note that these graphs depict trends of growth and decline, not actual numbers of permits.

The graph to the right shows total permitted housing units.⁸ The housing permit trends for Western Wayne County correlate more closely with Eastern Monroe County than with the State or National trends. Since 2019, the number of building permits have been growing in Western Wayne County, as opposed to declining in Eastern Monroe. This could be an indication that development interest has shifted across the border from Monroe to Wayne County.

New Privately Owned Housing Unit Authorizations All Housing Units

Index: 2010 = 100

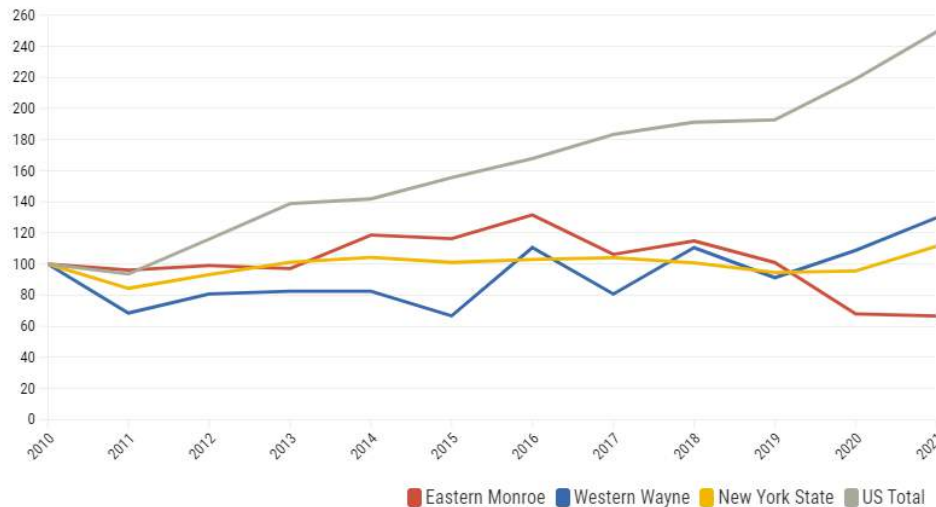


Source: US Census Bureau Building Permits Survey

⁸ The apparent spike in multi-family housing permits in 2015 for New York State is likely a data anomaly.
Wayne County Housing Needs Assessment & Market Analysis

New Privately Owned Housing Unit Authorizations Single-Family Housing

Index: 2010 = 100



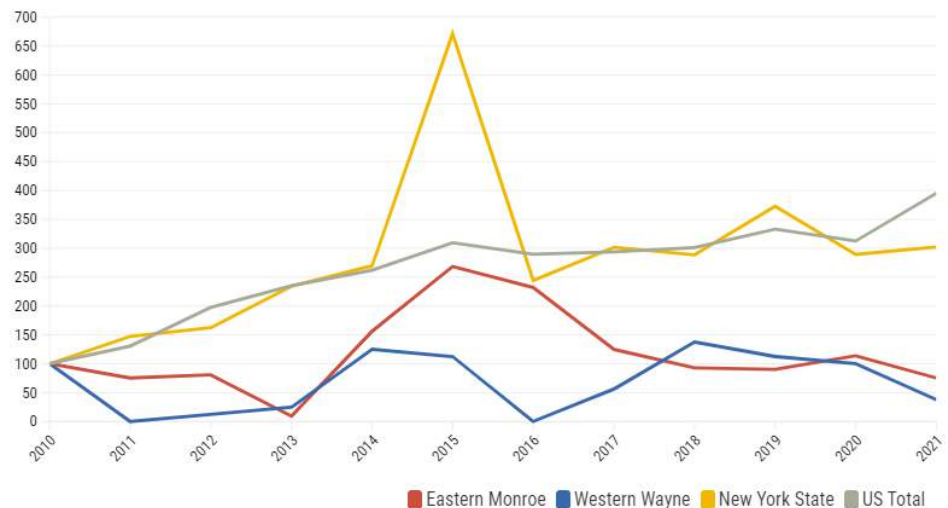
Source: US Census Bureau Building Permits Survey

The graph to the right shows multi-family building permit trends, indexed to 2010 levels. Nationally and state-wide, permits have grown substantially since 2010⁹. Locally, the trends in Wayne and Monroe County do appear to have some correlation, but it is difficult to discern the nature of that correlation. Western Wayne County has seen declining multi-family building permits since 2018. In real terms, there were 22 permitted multi-family units in 2018, but only 6 in 2021.

The graph to the left shows single-family building permit trends, indexed to 2010 levels. Nationally, single-family permits have grown consistently, whereas they've been generally stable in New York State as a whole. Western Wayne and Eastern Monroe have seen slightly more fluctuation, with single-family permits trending upwards in Western Wayne and declining in Eastern Monroe, particularly since 2016. In real terms, there were 74 single-family permits in 2021, compared to 57 in 2010.

New Privately Owned Housing Unit Authorizations Multi-Family Housing

Index: 2010 = 100



Source: US Census Bureau Building Permits Survey

⁹ The apparent spike in multi-family housing permits in 2015 for New York State is likely a data anomaly.
Wayne County Housing Needs Assessment & Market Analysis

County Planning Board Referrals show a slightly more optimistic trend. Local municipalities make referrals to the County Planning board under certain circumstances. While not all housing project reviews are referred, most significant multi-family developments and large single-family subdivisions would generally be referred to the County Planning Board. From April 2019 through March 2023, 57 housing projects accounting for 344 single family and 811 multi-family units were referred to the County Planning board for approval. Of those, 49 projects were in the Western Market area, including 327 single family and 791 multi-family units. In the Northeastern market area there were only 3 projects, all of which were single family development. The Southeastern market area had 5 projects with 20 multi-family units and 2 single family units.

Housing Related Referrals to the Wayne County Planning Board, April 2019 - March 2023

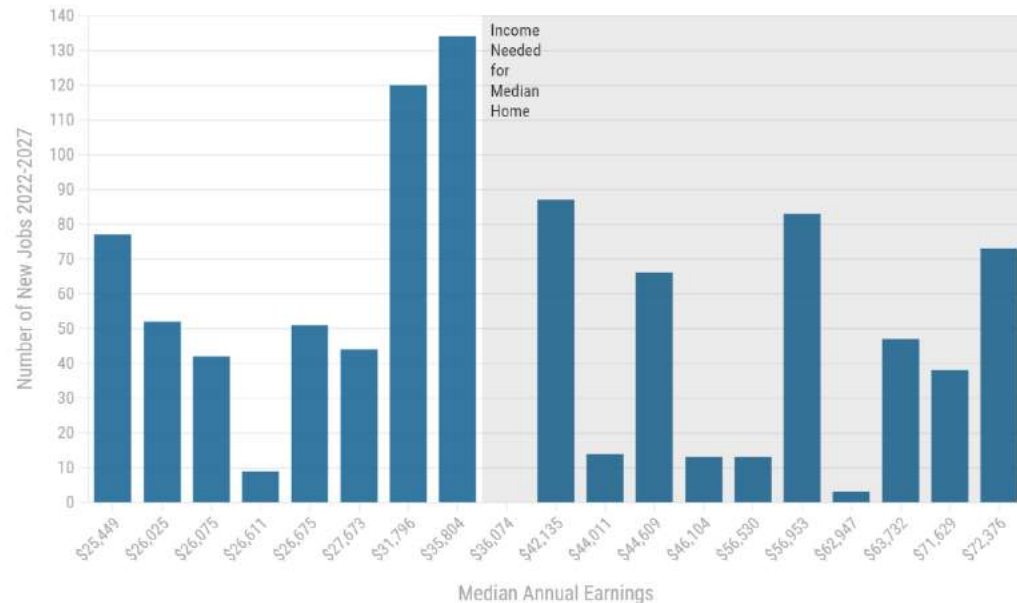
	Project Referrals	Units	Single Family Units	Multi-Family Units
Wayne County	57	1,155	344	811
Western	49	1,118	327	791
Northeastern	3	15	15	-
Southeastern	5	22	2	20

Source: Wayne County Planning Department

Workforce Trends

Housing needs into the future will be influenced by employment trends in the county. Understanding the income levels anticipated will help to determine the appropriate types of housing needed for the market. The chart below shows anticipated job growth by income level from 2022-2027. It also compares this to the income level needed to reasonably afford a home at the current median home value. It is estimated that 55% of new jobs through 2027 will not offer annual earnings sufficient for home ownership on a single income, but roughly 250 of these new jobs will fall within \$6,000 of this threshold. This will shift over time depending on trends in wages and home values, but this offers a reasonable guidepost for policy and programming purposes.

45% of 2022-2027 jobs can afford a median-priced home Wayne County, NY



Source: Lightcast

Generally, households that expend more than 30% of their income on housing (rent or mortgage, plus utilities) are considered to be cost-burdened. The table to the right shows the cost-burden thresholds for different income levels. According to Esri BAO, the current average rent rate in Wayne County is \$648 per month. When taking utilities into account, the average gross rent is \$792 per month. The above data indicates that approximately 250 of the projected jobs will offer \$30,000 to \$36,000 in annual earnings. If living in single income households, these workers can afford \$750 to \$900 per month on housing costs without being considered cost-burdened. Under current conditions, these households would likely be able to afford rental housing, but not necessarily homeownership. There are also approximately 275 jobs anticipated that will offer approximately \$25,000-\$30,000. If living in single income households, these workers can afford \$625 to \$750 per month on housing costs without being considered cost-burdened. This group would be more likely to be cost-burdened, even in a rental situation.¹⁰

Interviews with major employers have revealed a need for flexible rental units due to the increasing use of contract employees, as well as to house students participating in cooperative programs. These individuals would likely be seeking apartments with shorter or flexible lease terms, with pricing in the affordable to market rate range.

Conclusion

Some key factors and trends to consider in future housing development include:

- 1) About 25% of current housing units are in two towns, Arcadia and Ontario.
- 2) Nearly 70% of housing units in the County are owner occupied, and most towns have over 60% owner occupied units. The areas with lower levels of owner-occupation tend to be the towns with more seasonal residences or larger villages.
- 3) Households tend to have more residents in the towns on the eastern side of the County.
- 4) The market for single-family homes has become restricted in recent years, with lower stock of homes for sale and rising sale prices. These trends are expected to continue unless there are deliveries of new homes to the market. Construction and rehab of additional single-family homes would help to control the increase in sale prices.
- 5) There are approximately 3100 rental units in Wayne County that are captured by the CoStar database. The number of multi-family units has not changed much over the last 10 years, although there are some units expected in 2024. The lack of new deliveries to

Housing Cost-Burden
Thresholds

Annual Household Income	Annual Housing Costs	Monthly Housing Costs
\$25,000	\$7,500	\$625
\$26,000	\$7,800	\$650
\$27,000	\$8,100	\$675
\$28,000	\$8,400	\$700
\$29,000	\$8,700	\$725
\$30,000	\$9,000	\$750
\$31,000	\$9,300	\$775
\$32,000	\$9,600	\$800
\$33,000	\$9,900	\$825
\$34,000	\$10,200	\$850
\$35,000	\$10,500	\$875
\$36,000	\$10,800	\$900
\$37,000	\$11,100	\$925
\$38,000	\$11,400	\$950
\$39,000	\$11,700	\$975
\$40,000	\$12,000	\$1,000

Source: MRB Group

¹⁰ Note that this analysis only considers income, cost and affordability, it does not account for availability and quality of housing units.
Wayne County Housing Needs Assessment & Market Analysis

the market has, in part, resulted in a vacancy rate of only .7% and steadily increasing market rents, currently averaging \$912 per month.

- 6) Since 2010, more than 70% of the new building permits for housing have been issued in the western portion of the County, indicating that there is the most development interest in those towns. In recent years, western Wayne County has seen an upward trend in single-family permits, but a downward trend in multi-family permits. Demand for housing units in western Wayne County is likely to continue to increase due to pressures from the Rochester area, but additional multi-family units will be needed as well to meet this demand.
- 7) In the next 5 years, it is anticipated that only 45% of new jobs will offer an annual wage that is sufficient to buy a home of median value. This confirms the need to increase the stock of rental units, as well as take steps to control the increase of single-family sale prices. Expanding resources and education for first-time homebuyers could also help households with incomes near the threshold.



Chapter 6: Housing Inventory Overview



PREPARED BY

MRB | *group*

November 2022

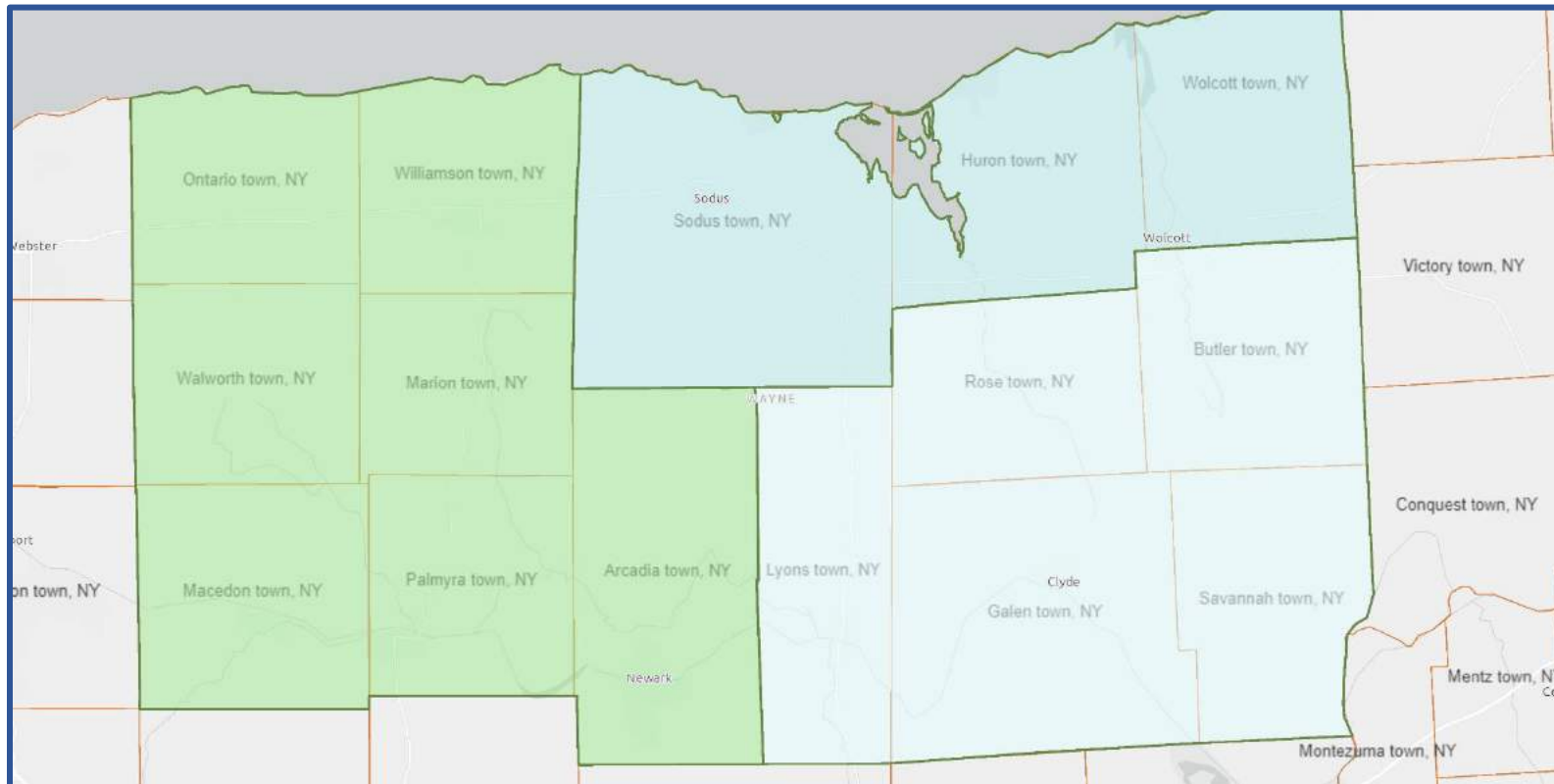
Market Area

The following housing inventory overview incorporated data for market areas of Wayne County. Following initial data analysis, interviews and discussions with the project team, these market areas were determined based on shared socio-economic characteristics, housing patterns, and economic influences.

Western Wayne County: Arcadia, Ontario, Williamson, Walworth, Marion, Macedon, Palmyra – Strong influence from the Rochester economic and labor markets.

Northeastern Wayne County: Sodus, Huron, Wolcott – Relatively high levels of seasonal residency and lakefront properties.

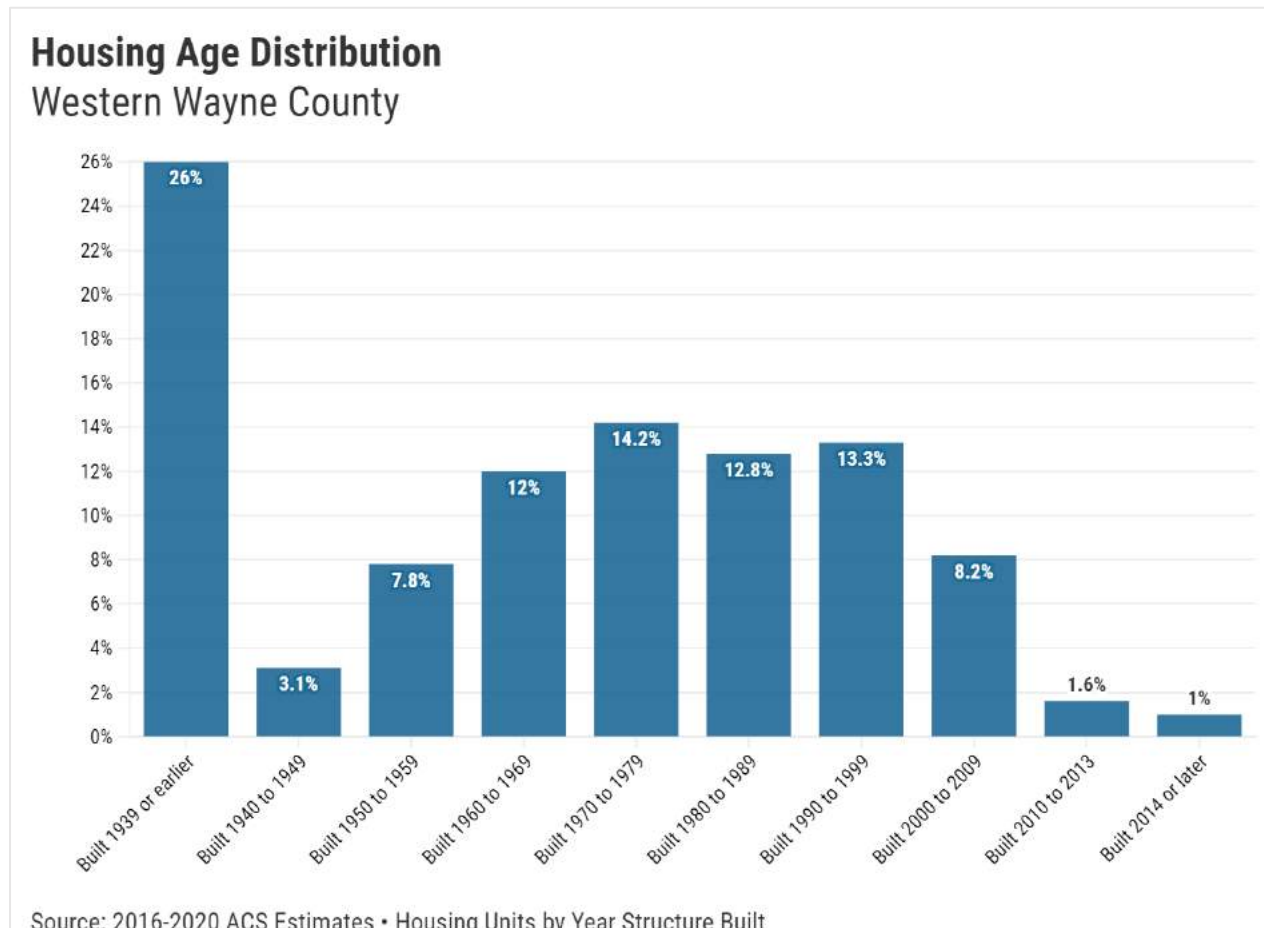
Southeastern Wayne County: Lyons, Rose, Butler, Galen, Savannah – Rural character and low population density.



Western Wayne County Housing Profile

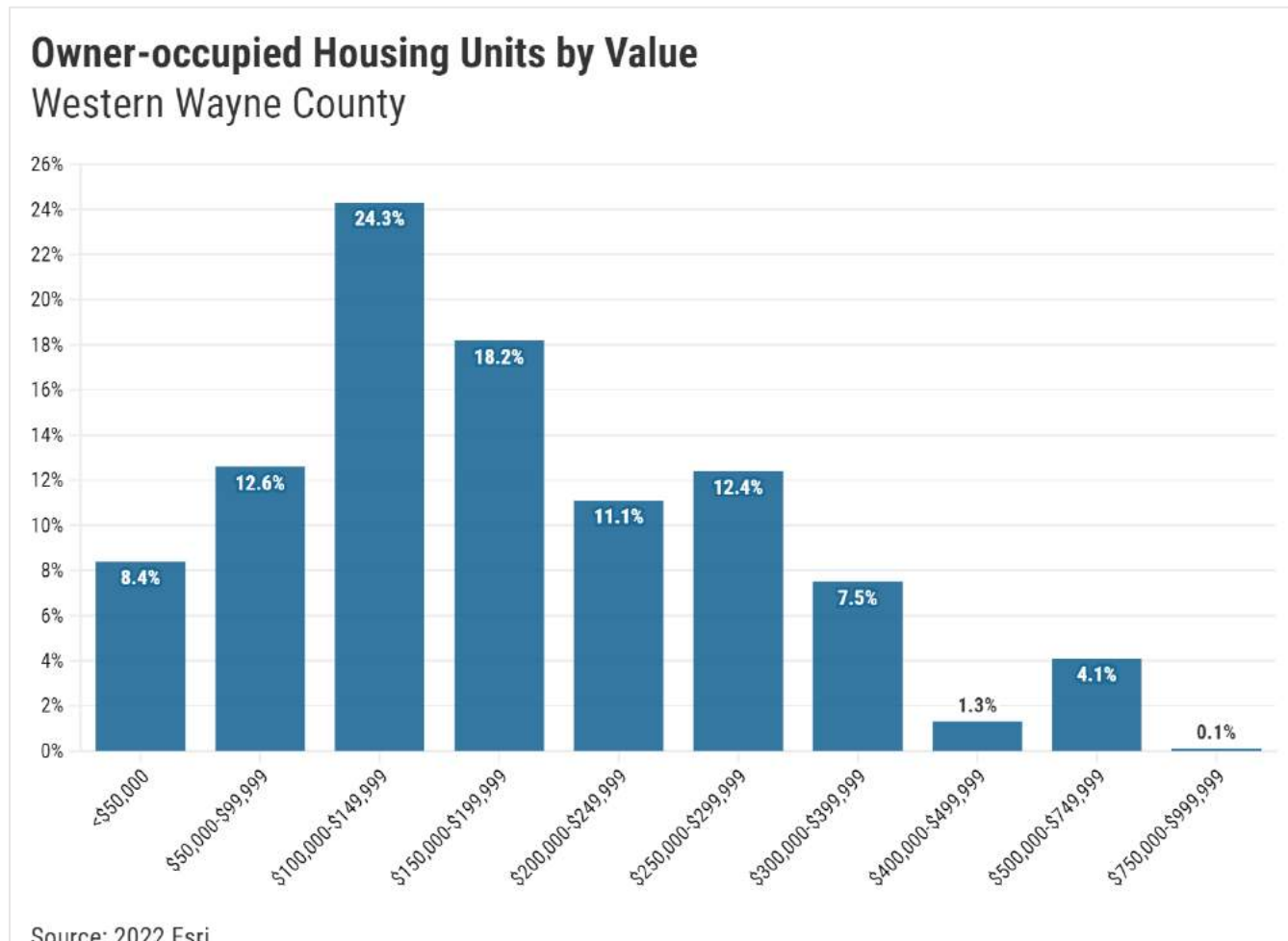
Age of Housing Stock

Housing in the Western market area of Wayne County is characterized by newer construction compared to the rest of the County, with fewer homes were built before 1940. The median year structures were built in this area was 1971. Slightly more than a quarter of the housing units in this area of Wayne County were built before 1939, and 10.8% of units were constructed in or after 2000. Roughly half of the housing in this area was built between 1940 and 1989.



Property Value & Condition

Compared with the other regions in Wayne County, the Western market area has more homes valued above \$500,000 and more homes of higher value in general. This area has fewer homes with values of less than \$50,000. The median value of homes in this area is \$162,798, and home values are more normally distributed around the average value. The chart below shows the percentage of housing units by value, showing that the highest percentage of homes in the Western market area are valued between \$100,000 and \$149,999.



In 2018 and 2019, Wayne County created a Derelict Property Strategy, which included an assessment to identify and quantify derelict properties throughout the county. This strategy defined derelict properties in the following way: "Derelict properties include properties that are unattractive and run-down but otherwise safe and economically contributing to their communities and those that are vacant, uninhabitable and that pose a threat to public health and safety. Derelict properties may also be those that are stuck in foreclosure (zombie) or are bank owned properties, whatever their visual or health and safety status. County tax foreclosure properties and privately-owned roll section 8 (tax-exempt) properties may also be derelict."¹¹

According to this study and its 2021 update, derelict properties are found throughout the

Western market area, with higher concentrations of derelict properties in the Town of Arcadia and the Villages of Newark and Palmyra. The Town of Ontario saw the largest increase in the number of derelict properties between 2018-2020 within the entire County, and the Village of Newark saw the third largest increase in that timeframe. The table to the right shows the counts and concentrations of derelict properties in Western municipalities.

Derelict Property Count & Concentration - Western Market Area

Municipality	Total Number of Derelict Properties, 2020	Percent of Total Properties that are Derelict, 2020	Net Change, 2018 - 2020
Village of Newark	108	3.4%	25
Town of Ontario	102	2.4%	39
Town of Arcadia*	91	3.7%	1
Town of Macedon	82	2.2%	11
Town of Walworth	82	2.2%	19
Town of Williamson	80	2.5%	18
Town of Marion	49	2.3%	11
Town of Palmyra*	42	2.2%	8
Village of Palmyra	40	3.4%	6
Total, Western Area	676	49.7%	138

Source: Derelict Property Strategy Update, Wayne County 2021

*Excluding Village(s)

¹¹ Source: Derelict Property Strategy, Wayne County. January 2019. Developed by LaBella.
Wayne County Housing Needs Assessment & Market Analysis

Ownership

The homeownership rate in this part of Wayne County is slightly higher than in the other two market areas. The table below shows Esri's estimates based on the 2010 Census data. According to these estimates, 72.3% of the housing in Western Wayne County is owner-occupied, 21.4% is rental, and 6.3% of the housing is vacant. Esri estimates that the homeownership rate will decrease slightly (less than 0.1 points) between 2022 and 2027. Over that same period, Esri forecasts vacancies to increase due primarily to a projected increase in the number of housing units.

Among the 1,674 vacant housing units identified in the 2020 American Community Survey data, 29.3% of the housing in Western Wayne County is identified as seasonal, recreational, or occasional use. The table to the right identifies vacant housing units by status.

"Other Vacant" refers to any vacancy reason other than those otherwise identified. According to the Census Bureau, the most common reasons for a unit to be labeled "other vacant" are that the owner does not want to sell/rent, is using the unit for storage, or is living in a nursing home or with family. This category also captures units that are being held for settlement of an estate or being repaired or renovated, as well as some foreclosures.

Occupancy Status & Tenure

	Census 2010		2022		2027	
	Number	Percent	Number	Percent	Number	Percent
Total Housing Units	26,254	100.0%	27,505	100.0%	27,670	100.0%
Occupied	24,591	93.7%	25,361	92.2%	25,393	91.8%
Owner	18,983	72.3%	19,408	70.6%	19,499	70.5%
Renter	5,608	21.4%	5,953	21.6%	5,894	21.3%
Vacant	1,663	6.3%	2,144	7.8%	2,277	8.2%

Source: 2022 Esri Housing Profile, Western Wayne County

2020 Vacant Housing Units by Status

	Number	Percent
Total	1,674	100.0%
For Rent	141	8.4%
Rented- Not Occupied	16	1.0%
For Sale Only	144	8.6%
Sold - Not Occupied	157	9.4%
Seasonal/Recreational/Occasional Use	491	29.3%
For Migrant Workers	16	1.0%
Other Vacant	709	42.4%

Source: Esri Housing Summary, US Census Bureau 2016-2020 ACS estimates

Specialized Housing

In Western Wayne County, there are 1,180 units identified as regulated or specialized housing units. Specialized and regulated housing units in Western Wayne County target seniors, families, and those with disabilities. Funding sources for this housing are LIHTC, Section 202, Section 8 housing, and Project-Based Rental Assistance.

Regulated & Specialized Housing Units

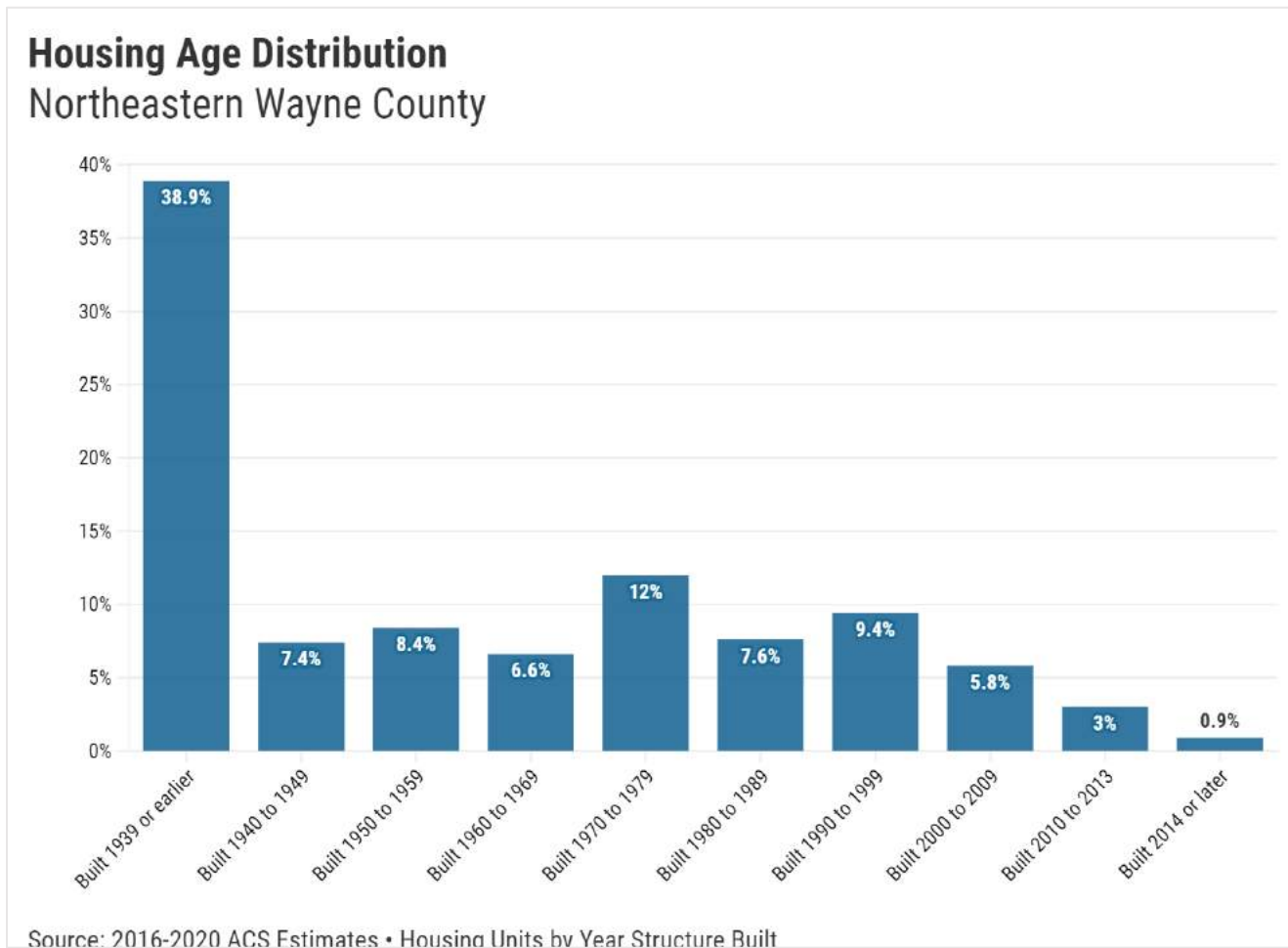
Complex Name	Town	Units
Blue Cut Apartments	Arcadia	8
Newark Rose Garden	Arcadia	76
Hemlock Hills	Macedon	80
Woodland Commons	Macedon	60
Evergreen Hills Apartments	Macedon	72
Evergreen Hills II	Macedon	80
Macedon Manor Apartments	Macedon	24
Lakeview Macedon	Macedon	60
Drumlin Estates	Marion	40
Marion Village	Marion	40
Brown Square I & II	Ontario	94
Ontario Townhouses	Ontario	40
Towpath Manor Apartments	Palmyra	65
Vienna Apartments	Palmyra	24
Willow Landing I & II	Palmyra	64
Towpath Senior Apartments	Palmyra	97
Evergreen Hills	Walworth	72
Evergreen Hills II	Walworth	80
Gananda Senior Apartments	Walworth	62
Harvest Court	Williamson	18
Williamson Orchard Estates	Williamson	24
Total		1,180

Source: Wayne County, HUD, USDA

Northeastern Wayne County Housing Profile

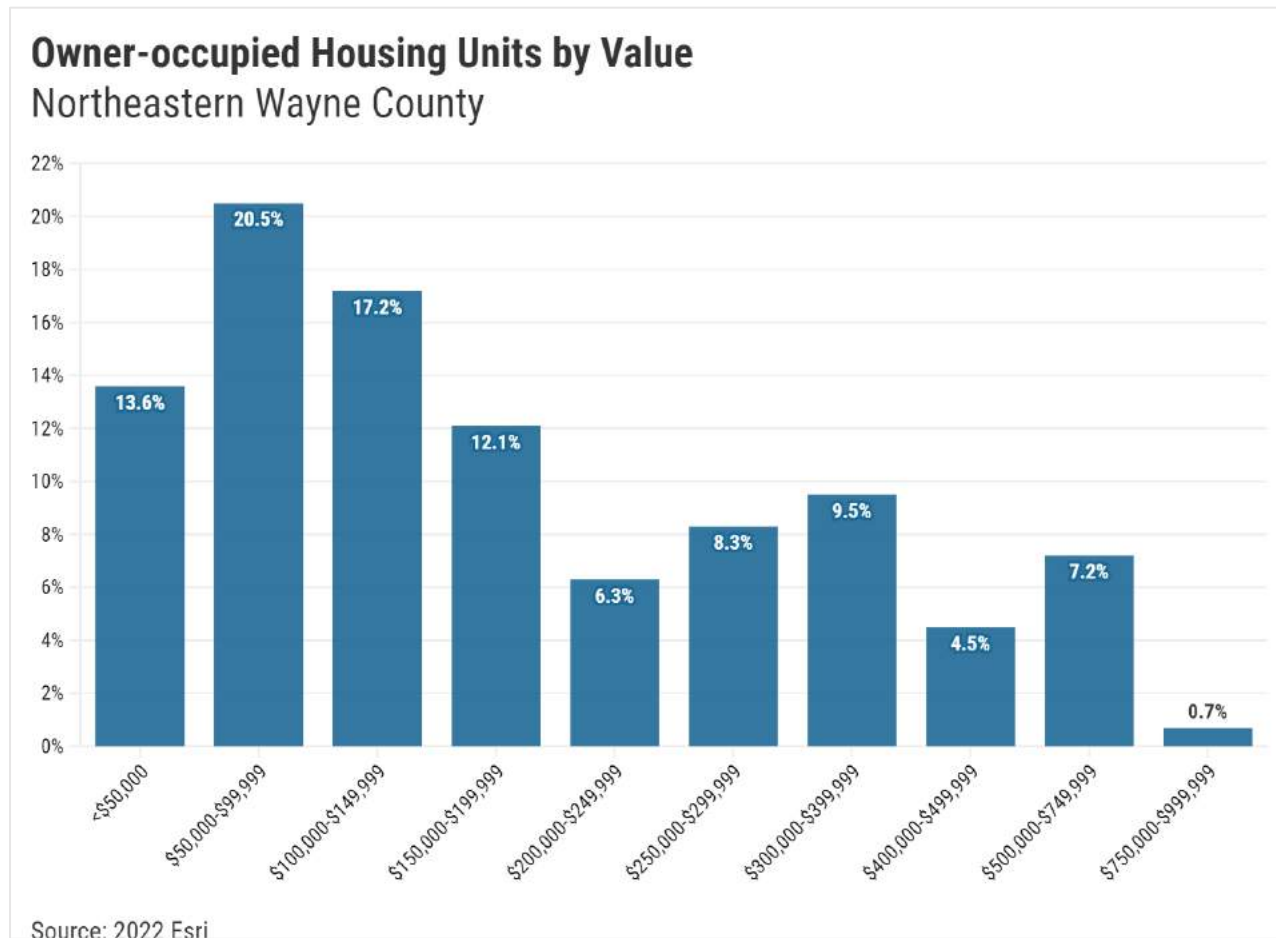
Age of Housing Stock

The median year of construction for the structures in the Northeastern market area of Wayne County is 1954. Nearly 40% of the housing in these towns was constructed before 1940, while only 9.7% of the housing units were built since 2000. The housing in this market area is older than the housing in the Western market area, but still newer than the housing stock in the Southeastern market area.



Property Value & Condition

While the median home value in this market area is \$111,631, housing values are distributed around two nodes with concentrations around the \$50,000-\$99,999 level and the \$300,000-\$399,999 level. This distribution indicates that there are two groups of housing values at the low and high ends. This is consistent with the observed dynamic of relatively small, seasonal and higher income areas along the lakefront juxtaposed against lower income areas in the rest of the market area. The table below shows the distribution of housing units by value for this area.



Though the Northeastern area of Wayne County generally has higher property values and lower levels of derelict properties, there are concentrations of derelict properties in the Village of Red Creek (5.57% of all properties are derelict) and in the Village of Wolcott (9.72%) according to Wayne County's Derelict Property Strategy (outlined above). The Village of Wolcott has the highest concentration of derelict properties in the County. Overall, this area saw less drastic increases in the number of derelict properties compared to other areas of the County, with only one community (the Village of Sodus) having an increase larger than 10.

Derelict Property Count & Concentration - Northeastern Market Area

Municipality	Total Number of Derelict Properties, 2020	Percent of Total Properties that are Derelict, 2020	Net Change, 2018 - 2020
Town of Sodus*	73	2.4%	9
Village of Wolcott	70	9.7%	9
Town of Huron	46	2.2%	(1)
Town of Wolcott*	45	2.5%	2
Village of Sodus	36	5.5%	12
Village of Sodus Point	22	2.2%	5
Village of Red Creek	16	5.6%	1
Total, Northeastern Area	308	22.6%	37

Source: Derelict Property Strategy Update, Wayne County 2021

*Excluding Village(s)

Ownership

This area of Wayne County has the highest level of housing unit vacancy (28.8%), driven by the number of seasonal and recreational use homes on or near Lake Ontario. The table to the right shows the distribution of housing status by owner- or renter-occupancy and vacancy. These estimates from Esri project that from 2022 to 2027, owner- and renter-occupied housing will decrease slightly as vacancies increase. This is projected concurrently with a forecast of an overall increase in total housing units over the same period.

Occupancy Status & Tenure

	Census 2010		2022		2027	
	Number	Percent	Number	Percent	Number	Percent
Total Housing Units	8,048	100.0%	8,116	100.0%	8,178	100.0%
Occupied	5,912	73.5%	5,779	71.2%	5,766	70.6%
Owner	4,552	56.6%	4,499	55.4%	4,515	55.2%
Renter	1,360	16.9%	1,280	15.8%	1,262	15.4%
Vacant	2,136	26.5%	2,337	28.8%	2,402	29.4%

Source: 2022 Esri Housing Profile, Northeastern Wayne County

2020 Vacant Housing Units by Status

	Number	Percent
Total	2,085	100.0%
For Rent	88	4.2%
Rented- Not Occupied	-	0.0%
For Sale Only	15	0.7%
Sold - Not Occupied	165	7.9%
Seasonal/Recreational/Occasional Use	1,449	69.5%
For Migrant Workers	70	3.4%
Other Vacant	298	14.3%

Source: Esri Housing Summary, US Census Bureau 2016-2020 ACS estimates

According to 2020 American Community Survey data, 69.5% of the 2,085 vacant housing units in Northeastern Wayne County are vacation homes. The table to the left shows the total number of vacant housing units by status.

Specialized Housing

There are 344 units of specialized and regulated housing in this market area. The largest housing development is in the Town of Sodus, but the Town of Wolcott has the most regulated units overall. Funding sources for these units come from LIHTC, Section 514 On-Farm Farm Labor-Housing, Section 515 Rural Rental Housing, and Project-Based Rental Assistance for Section 8 housing. We did not identify any regulated housing units directly targeting those with a disability, seniors, families, or other specialized needs. However, interviews with community stakeholders have indicated that one of the developments in Wolcott has a focus on individuals with disabilities.

Regulated & Specialized Housing Units

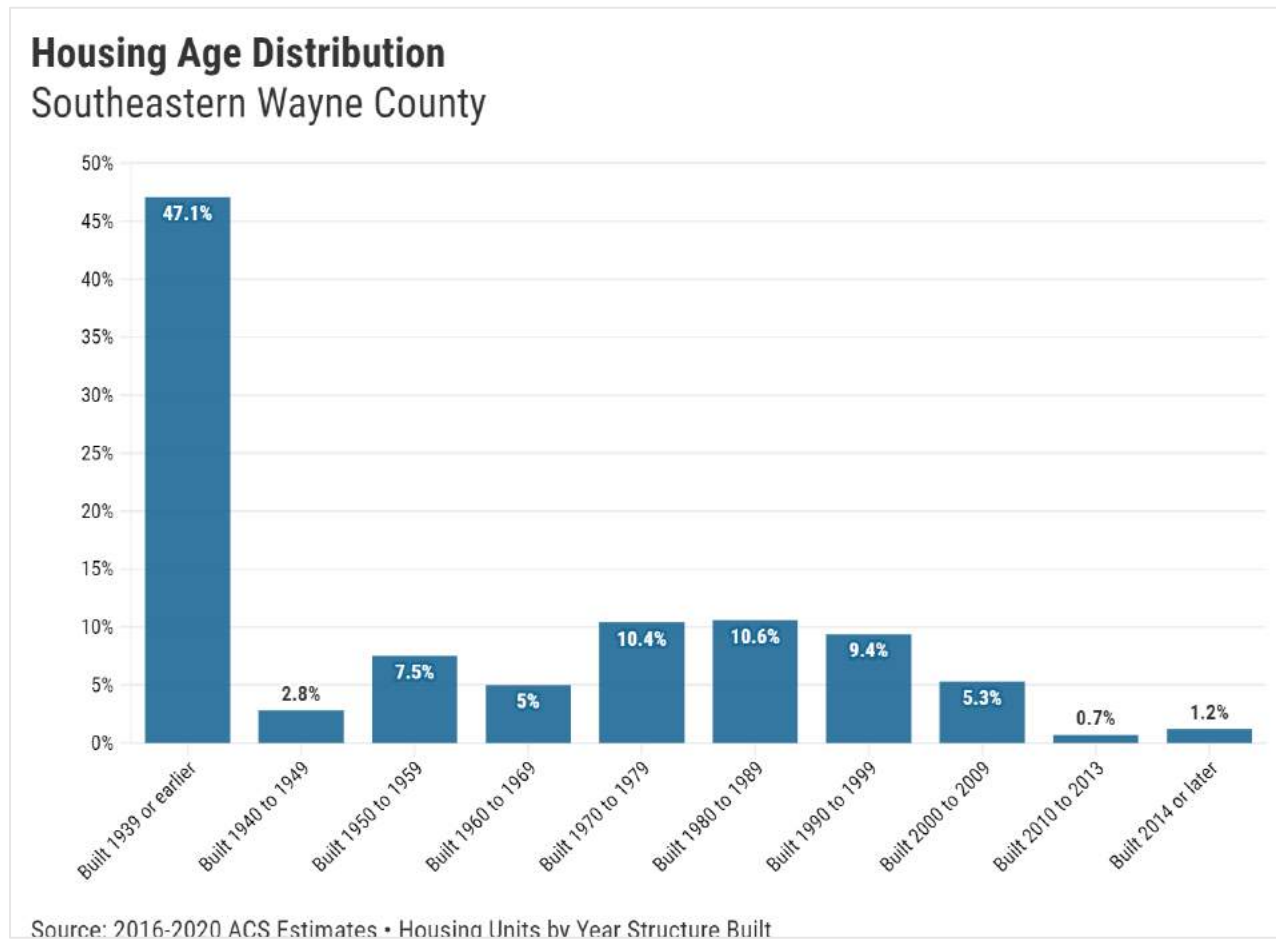
Complex Name	Town	Units
Hope Village	Huron	25
Fowler Brothers INC	Huron	5
Fowler Brothers INC	Huron	18
Wolcott Meadows C/O Diane Rock	Huron	40
Harvest Park	Sodus	6
Sodus Estates	Sodus	24
Sodus and Williamson 11 Road	Sodus	94
Red Creek Garden	Wolcott	32
Wolcott Estates	Wolcott	30
Wolcott Meadows	Wolcott	70
Total		344

Source: Wayne County, HUD, USDA

Southeastern Wayne County Housing Profile

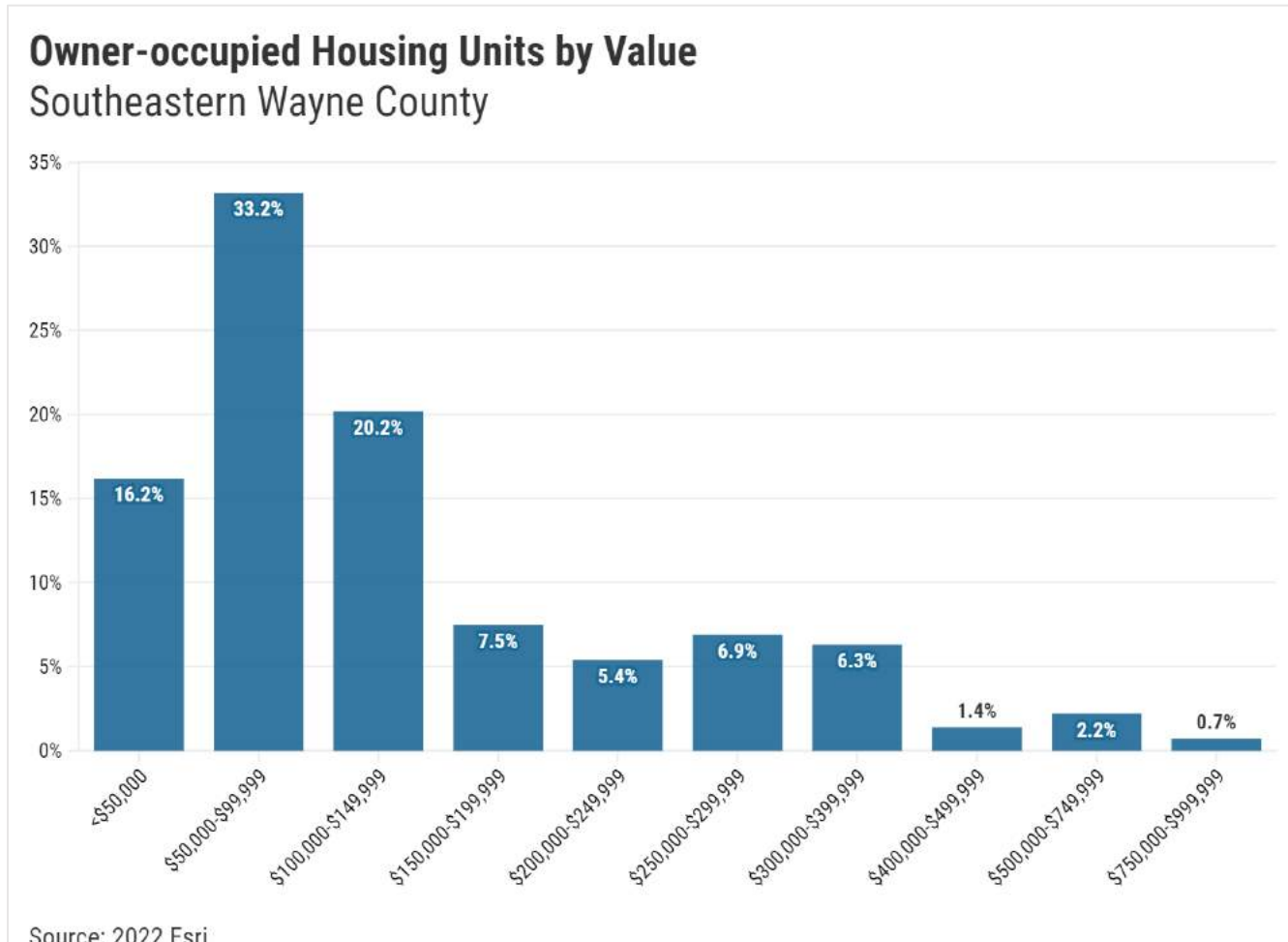
Age of Housing Stock

In the Southeastern market area of Wayne County, nearly half of the housing was constructed before 1940. The median year of construction for the structures in this market area is 1950, and only 7.2% of the housing has been built since 2000. Compared with the other regions of Wayne County, the Southeastern towns have a housing stock with the highest concentration of older homes and the lowest rate of homes built since 2000.



Property Value & Condition

Generally, housing units in this part of Wayne County are older and less expensive. This market area has the highest percentage of units valued at less than \$50,000 and a median home value of \$83,045. This is the only market area with a median home value below \$100,000. The chart below shows the distribution of housing units by value in the Southeastern area of the County. Overall, 16.2% of the housing is valued at less than \$50,000, and nearly 50% is valued at less than \$100,000.



According to the Wayne County Derelict Property Strategy, the Towns in the Southeastern market area generally have higher levels of derelict properties than the rest of Wayne County. The Town of Savannah and the Village of Clyde have the highest concentrations of derelict properties in this area. The Village of Clyde has the second highest concentration of derelict properties in the County. The Town of Lyons has the second largest increase in the number of derelict properties between 2018 and 2020. The town of Rose also saw a substantial increase in the number of derelict properties during this timeframe.

Derelict Property Count & Concentration - Southeastern Market Area

Municipality	Total Number of Derelict Properties, 2020	Percent of Total Properties that are Derelict, 2020	Net Change, 2018 - 2020
Town of Lyons	109	4.2%	30
Village of Clyde	82	8.2%	10
Town of Savannah	60	6.1%	10
Town of Rose	50	3.7%	24
Town of Galen*	49	3.6%	(3)
Town of Butler*	27	2.9%	2
Total, Southeastern Area	377	27.7%	73

Source: Derelict Property Strategy Update, Wayne County 2021

*Excluding Village(s)

Ownership

Homeownership rates are lower in Southeastern Wayne County, with a higher percentage of renters compared to the rest of the County. There is also a higher level of vacant properties compared to the Western market area, and higher levels of unoccupied vacancy than the Northeastern market area.

Occupancy Status & Tenure

	Census 2010		2022		2027	
	Number	Percent	Number	Percent	Number	Percent
Total Housing Units	6,755	100.0%	6,960	100.0%	7,030	100.0%
Occupied	6,082	90.0%	6,178	88.8%	6,216	88.4%
Owner	4,571	67.7%	4,789	68.8%	4,824	68.6%
Renter	1,511	22.4%	1,389	20.0%	1,392	19.8%
Vacant	673	10.0%	782	11.2%	814	11.6%

Source: 2022 Esri Housing Profile, Southeastern Wayne County

2020 Vacant Housing Units by Status

	Number	Percent
Total	752	100.0%
For Rent	131	17.4%
Rented- Not Occupied	28	3.7%
For Sale Only	55	7.3%
Sold - Not Occupied	76	10.1%
Seasonal/Recreational/Occasional Use	77	10.2%
For Migrant Workers	-	0.0%
Other Vacant	385	51.2%

Source: Esri Housing Summary, US Census Bureau 2016-2020 ACS estimates

Among the 752 vacant properties identified in the 2020 American Community Survey data, 17.4% are for rent, while 10.2% of the vacant properties were identified as seasonal, recreational, or occasional use. The table to the left shows the distribution of vacant housing units in this area by status.

Specialized Housing

According to Wayne County records and our survey of HUD and USDA data, there are 191 specialized and regulated housing units in the Towns of Galen, Lyons, and Savannah. No rental units of specialized or regulated housing were identified in the Towns of Rose or Butler. In the Southeastern market area, the specialized and regulated housing units were funded by LIHTC, Section 515 Rural Rental Housing, the HOME Program, and section 202. Specialized housing in this region was available for seniors and families, but we identified no housing units targeting those with disabilities.

Regulated & Specialized Housing Units

Complex Name	Town	Units
Midtown Square Apartments	Galen	24
Windy Hill Apartments	Galen	30
Smith-Ely Mansion	Galen	7
Canal View Apartments	Lyons	36
Crowley House	Lyons	6
Granite Works	Lyons	4
Lyons Manor	Lyons	39
Nusbickel Building	Lyons	12
111 Geneva Street	Lyons	9
Spring Valley Apartments	Savannah	24
Total		191

Source: Wayne County, HUD, USDA

Conclusion & Comparison Table

The housing inventory of each market area of the County confirms that there are both similarities and differences between the different areas. This means that not every action or strategy is going to be the right option for every town and community. For instance, the Western Area appears to have the most demand and a relatively newer housing stock compared to other areas of the County. Strategies that address the availability and affordability of housing may be more suited here. On the contrary, the Southeastern Area has the oldest housing stock and lowest property values. Strategies that focus on housing quality are likely to be the most appropriate here, followed by availability. The Northeastern Area has a mix of both seasonal homes along the lake, but also above average poverty levels. The needs of these seasonal property owners and low-income families are divergent, and as such housing strategies are needed for both populations.

The table below provides key data point for all three regions. This data is the same as presented within this report, but is organized for easier comparison across market areas.

Wayne County Market Area Comparison - Housing Inventory

Data	Western Area	Northeastern Area	Southeastern Area
Total Housing Units (2022)	27,505	8,116	6,960
Median Year of Construction	1,971	1,954	1,950
% of Units built Before 1940	26.0%	38.9%	47.1%
% of Units built After 2000	10.8%	9.7%	7.2%
Median Property Value - Owner Occupied	\$162,798	\$111,631	\$83,045
Number of Derelict Properties	676	308	377
% of Units Owner Occupied (2022)	70.6%	55.4%	68.8%
% of Units Renter Occupied (2022)	21.6%	15.8%	20.0%
% of Units Vacant (2022)	7.8%	28.8%	11.2%
% of Vacant Units that are Seasonal (2022)	19.3%	67.5%	14.6%
Number of Specialized Housing Units	1,180	344	191



Chapter 7: Stakeholder Engagement Summary



PREPARED BY

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Introduction

Wayne County engaged MRB Group to develop a Housing Needs Assessment and related strategy addressing identified gaps. While the assessment is grounded in data, stakeholder input is also a critical step in the planning process. Through engaging with a committee and interviews with partners, local experts, and local municipal leaders, MRB Group was able to gather a better understanding of capabilities and capacity of partners, similarities and differences between communities, and the local challenges for housing development.

Project Steering Committee

The Project Steering Committee met three times throughout the planning process. They reviewed the various sections of this report and provided feedback. At and in between meetings, they also provided input about community partners, potential challenges to research, and information about programming that is already in place. The makeup of the committee, many of them representing key housing partners, meant that they could act as a first line of information for the project team. Some key thematic areas that arose from the committee, leading to additional investigation, included:

- Housing conditions for migrant laborers
 - One of the stakeholder interviews was dedicated to this topic, and included representatives of three organizations familiar with migrant worker conditions and the agricultural community. This interview confirmed that workers that do not have access to farm-provided housing, workers with families, and year-round workers often have the most insecurity with housing. However, there are also some quality concerns with some farm provided housing as well. The County used grant funding for programs aimed at improving the quality of farm worker housing, which was a successful partnership with PathStone. Undoubtedly, more could be done but the scope of the need is not clear. The stakeholders also indicated a need for more data to better quantify housing availability and quality, but noted that some farmers are reluctant to provide information to governments. They recommended a survey in partnership with organizations that are connected to the farming ecosystem (e.g. Finger Lakes Coalition, Cornell Cooperative Extension, Farm Bureau, etc.). The California Institute of Rural Studies completed a 2018 Farmworker Housing Study and Action Plan¹² that included a multi-jurisdictional, multi-organizational effort to address farmworker housing needs. This could be a template for examining the such issues in Western New York.
- Mobile and manufactured homes as a means of affordable homeownership, if properly maintained and managed

¹² The 2018 Farmworker Housing Study and Action Plan can be reviewed at the following link:

https://www.cityofsalinas.org/sites/default/files/departments_files/community_development_files/farmworker_housing_study.saslinas-pajaro.june_15-2018.complete.pdf

- Pathways to homeownership, particularly for low- and moderate-income households.

Interviews: Local Municipal Leaders

Outreach was conducted to all Town Supervisors and Village Mayors, with a significant number of responses. Supervisors and Mayors were asked to provide a general overview of existing market conditions and housing activity in their communities, and a characterization of their plans or preferences for future growth. The following themes were noted:

Geographic Growth Distribution

With limited exceptions, the Towns on the western end of the County are experiencing significant growth pressures resulting from expanding housing demand in the Rochester market. These communities are establishing a strong planning foundation via recently initiated or completed comprehensive plans and zoning ordinance updates. Inherent in this geography is a demand for housing diversification – with multi-family, townhome, and other concentrated development proposals becoming more commonplace. These communities are generally well-served with infrastructure, and are embracing growth opportunities.

Towns in the central and eastern segments of the County are seeing far fewer development proposals, and are maintaining an agricultural profile. Tight budgets are more prevalent in these communities, and existing tax bases cannot support expansive investment in infrastructure that may be needed to entice additional housing demand.

A wrinkle in these findings is along the Lake Ontario waterfront. In most communities with a developable waterfront, significant housing development interest persists.

Manufactured Home Parks

Several Supervisors and Mayors noted the presence of manufactured home parks. In most cases, local leaders suggested that the parks were well run, and seemed to be reinvesting to ensure quality of life for residents. Several parks in the County have been recently sold, and local leadership is anticipating or seeing significant reinvestment. One Town inspects and issues operating permits to mobile and manufactured home parks annually. This helps to ensure maintenance and resident safety.

A Universal Call for Responsible Growth

In nearly every interview, Mayors and Supervisors indicated a strong preference to locate growth in areas of the community with ready access to services, infrastructure, and employment centers. Multiple specifically noted a desire to address workforce housing gaps, particularly in manufacturing, healthcare and agriculture. A strong preference to preserve agriculture and rural character where appropriate was indicated. Even in faster growing Towns along the County's western edge, communities recognized their existing land use diversity, and sought to protect agricultural and other rural assets.

Corridors as Development Opportunities

Supervisors and Mayors, in many cases supported by the community's comprehensive plan, have identified transportation corridors as strong mixed-use hub development opportunities. Local leaders envision these hubs as opportunities to create shopping, dining, and more dense housing in concentrated fashion, so as to limit expenses associated with utility and transportation infrastructure, and create unique quality of life for residents. Potential development and redevelopment corridors include:

- Newark at NY 88 and NY 31
- Lyons at NY 14 and NY 31
- Walworth along the NY 441 Corridor
- Macedon along the NY 31 Corridor
- Ontario along the NY 250 Corridor

Challenges with Infrastructure and Associated Costs

Local leaders provided a mixed response with respect to infrastructure. In western communities, local leaders indicated a strong position relative to water, wastewater, broadband, electric and natural gas. They viewed development activity as well-supported by infrastructure. In the central and eastern portions of the County, the costs to extend, reinforce, or replace failing water and sewer distribution, collection, and treatment infrastructure were cited as concern.

Of particular note in the central and eastern parts of the County is a challenge with electric power. Local leaders are receiving information from utility providers that planned or projected developments cannot be supported by existing substation infrastructure. This may challenge future growth scenarios if unaddressed.

Property Maintenance Varies Between Towns and Villages

Mayors indicated a stronger concern with property maintenance in Villages; particularly in downtown cores. This also held true in the former Village of Lyons. On the whole, Town leadership expressed less concern with this, particularly given the nature of rural development and agricultural development.

In general, observations by local leadership aligns closely with the findings of the market analysis. In western Wayne County, local leaders have a high level of confidence in future market performance, and see substantial growth opportunities. In the central and eastern portions of the County, leaders remain optimistic, but recognize the market challenges needed to spark housing development, and the importance of preserving rural character and the agricultural economy.

Interviews: Local Partners and Experts

The MRB Group project team conducted eleven additional interviews that included eighteen individuals. These interviews included employers, non-profit partners, property developers, County department representatives, and a lender. Questions for each of these interviews generally revolved around the opportunities and challenges for housing development, as well as specific needs the interviewee is seeing in the community and among their own stakeholders. These conversations varied due to the different perspectives offered, but ultimately led to successful identification of gaps, needs, barriers, and potential solutions. Many of the key findings outlined in the executive summary were identified or reinforced during these interviews. Some common themes included:

Workforce Housing Needs are Shifting

- Employers reported using more contract and temporary labor to fill positions, particularly in healthcare and manufacturing. These positions may last 3 months to 3 years, so these workers need short term, flexible housing options. The positions being contracted range from entry level to professional, so different price points and quality are also needed.
 - Developers indicated that rental solutions would likely require solid partnerships with and/or commitments from employers to ensure financial viability and financing opportunities.
- Employers also noted walkability as a key factor for workforce housing (temporary or permanent), as an increasing number of workers do not have vehicles and/or licenses. In some cases this is due to income levels, in others it is by choice. More young workers in particular are choosing not to drive.
- Transportation and childcare are also challenging barriers, especially for shiftwork.
- Recently, workers have been struggling with cost vs quality of housing, and workers are expressing a desire for higher quality options. Even houses that need a lot of upgrades and work are selling for a lot of money. It is becoming a retention issue for employers.
- Many professional level employees are choosing to live in Ontario and Monroe Counties, presumably because they perceive the schools, housing, and amenities as higher quality.

Senior Housing Options

- Many seniors are struggling with the maintenance and upkeep of their homes, but also don't have any other housing options within the community.
- ADA accessibility within the rental market is lacking. Seniors will often need either first floor units or an elevator. Many older homes have been renovated without accessibility in mind, and in downtown areas many mixed-use conversions don't have elevators or first floor residential units.
 - One interviewee indicated that ADA accessibility is the second biggest issue for senior, behind only affordability.
- There are a number of local programs to address maintenance and ADA modifications for the homes of seniors, but seniors may not know about them.

- It is sometimes hard to convince seniors that they need help.
- Some affordable senior housing developers have run into resistance from communities and municipalities in the past.
- Even independent living communities for seniors would open a lot of opportunities. E.g. Seniors move into a townhome/apartment, their houses can be fixed up, families/professionals can buy those homes. Multiple interviewees indicated that they work with seniors who would take advantage of a townhome or condo type opportunity.

Housing Vulnerable Families and Youth Need More Resources

- Single parents with children are the hardest group to house because they need multiple bedrooms, and there are numerous complicating factors (e.g. transportation, school district, childcare, etc.).
 - One landlord reported that they always have a waiting list for larger, 3- and 4-bedroom units. There is a lot more demand than supply.
- When housing insecure, many families either double up in smaller units or split up to stay with other family and friends.
- Young people who move often need more resources and services. Data shows that moving a lot, specifically changing school districts, is correlated with a lot of other risk factors. However, many school districts are not fully complying with McKinney Vento, which could keep children in a single school district even if they are moving around the County. Schools also don't provide a structured support system for students who do switch districts.
- There are no youth housing initiatives or shelters in Wayne County. Many end up going to Monroe County.
- There is limited programming for families facing housing insecurity, partly because there are a lot more regulations when working with children. Filling this need would likely require strong and well-defined partnerships between nonprofit providers and local government.
- There are models for youth services in nearby communities.
- School district databases regarding homelessness are not connected to the official homeless database.

Better Coordination is Needed Among Partners

- The lender we spoke with felt that home buyers would benefit from more financial education prior to a loan application, including realistic expectation about the timeline for closing, cash needed to close, and budgeting for a mortgage payment. However, the lender is not currently partnering with any community organizations to provide this. They are also not aware of or referring homebuyers to local and regional home improvement funding programs.
- One interviewee noted that many people don't know about the resources available to them. It was suggested that the service providing ecosystem could do a better job of informing and educating the community about available programming, including weatherization, accessibility modification, and property maintenance funding for housing.
- Better connections between agencies and other community organizations would even be helpful from a data perspective.

Infrastructure is a Challenge to Development

- Larger residential development will need access to sewer and water, but availability is limited.
- Where sewer and water does exist, developers sometimes have a difficult time accessing it. Some municipalities are not entirely sure where the infrastructure is, and others do not have a clear process for tying in new users. Furthermore, the infrastructure is aging in some areas and cannot accommodate large scale residential development.
- Almost every interviewee noted transportation as critically important when planning for housing. However, the public transportation system in Wayne County is limited. There are currently only a few areas of the County that would be appropriate for specific types of housing, like housing for seniors, housing insecure families, workers without vehicles, and low-income individuals.

Housing Quality is Deteriorating

- The lender we interviewed indicated that many buyers are waiving inspections, but then many appraisals are showing a lack of maintenance and upkeep. This is a challenge for home buyers relying on bank financing.
- In some areas of the County, there is a lack of local contractors. One interviewee indicated the return of small contractors, many of which moved or shut down during the pandemic, as a top need to address housing quality and maintenance.
- As noted above, employers report that employees are struggling to fund quality housing at an affordable price.
- The age and quality of the housing stock is more of an issue on the eastern side of the County, but can be seen throughout the County.

Conclusion

Stakeholder engagement was critical in the development of the Housing Needs Assessment and Strategy for Wayne County. The project team successfully gathered valuable insights and information through committee meetings and interviews with local municipal leaders, partners, and experts. The findings from these engagements revealed key thematic areas, gaps, and opportunities.

Interviews with local municipal leaders highlighted a shared desire to preserve the rural character of communities while still allowing for needed development, particularly in the area of housing. Many saw the utilization of smart growth principles as a means of accomplishing this goal. Meanwhile, interviews with local partners and experts shed light on various housing needs and challenges for different areas and populations within the County. Insights were gained to shifting workforce housing needs, housing gaps for senior residents, and the challenges facing housing insecure families and youth. Planned and targeted housing development, increased coordination among non-profit and government partners, and broader community outreach are all likely strategies to address these issues.