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Bracing for Change:

A Market Study of Community Needs,
the Built Environment, and Projected
Growth in Thomas, West Virginia



**Downstream
Strategies**

Ideas that sustain.

Prepared for the City of
Thomas, West Virginia
by Downstream Strategies

September 2021

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About Downstream Strategies

Downstream Strategies is an environmental and economic development consulting firm with offices in Morgantown, Lewisburg, and Davis, West Virginia.

As a company committed to the environmental and economic vitality of Appalachia's communities, Downstream Strategies takes an integrated, holistic approach to brownfields redevelopment. We offer specialized services across every phase of brownfields redevelopment, from economic assessment and market feasibility to environmental due diligence and construction.

Since 2014, Downstream Strategies has served as the lead technical consultant and Licensed Remediation Specialist (LRS) for several grant-funded brownfields projects for the City of Thomas. This report was completed by Downstream Strategies' Redevelopment Planning Team in 2021 funded by the City of Thomas' FY2017 EPA Brownfields Assessment Grant.

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EXECUTIVE SUMMARY

Introduction

Thomas, West Virginia, and the surrounding area of Tucker County have tremendous opportunities for development on the horizon.

As a four-season outdoor playground, the Canaan Valley area has been one of West Virginia's top tourism destinations for decades. Thomas and the neighboring town of Davis serve as gateway communities to Canaan Valley and the surrounding public lands, and they have emerged in recent years as key destinations in their own right.

Today, Thomas and Davis are among the most desirable small towns in West Virginia and beyond. With a combined population of just over 1,000 people and less than three miles between their downtowns, these two communities boast a vibrant local arts scene, breweries, coffee shops, and unparalleled access to the outdoors—all within a few hours' drive from Washington, D.C. and other major urban centers.

Record numbers of visitors from across the eastern United States flocked to this corner of West Virginia in 2020, and more people than ever before are visiting and buying property in the eastern half of Tucker County. And with Virgin Hyperloop's announcement that its Certification Center will be built in Tucker and Grant counties, the area now foresees an influx of jobs—including high-level technology positions—within the next few years.

New residents, increased tourism, and planned development could tremendously

benefit the local and regional economies of Thomas and Tucker County. However, the unprecedented growth is magnifying pressure on already overstrained local infrastructure: Thomas, Davis, and the greater Canaan Valley area face a critical housing shortage coupled with severe wastewater capacity limitations. The deluge of visitors has resulted in increasing traffic and strains on emergency services, and unmet business needs, lack of land use regulations, and persistent telecommunications barriers present impediments to residents and visitors alike.

As a result, these issues and resource gaps are now at a crucial point where future development in Thomas and the surrounding area cannot happen until these key infrastructure and community capacity needs are addressed.

About this report

Prepared as part of the City of Thomas' FY17 Brownfields Assessment Grant project, this report explores several areas of community infrastructure that will be critical to supporting growth in the greater Thomas area. It then examines how brownfields redevelopment can be part of the solution to meeting community needs.

This report begins with a profile of baseline conditions in Thomas and Tucker County, as well as the outlook for growth. It then presents two complete assessments:

- The **market assessment** explores both current conditions as well the outlook for growth in Thomas and surrounding Tucker County. It includes detailed sections on **housing and business needs**, which due to changing dynamics and market forces are both critical to local and regional economies.
- The **built environment assessment** explores critical infrastructure and infill development opportunities in Thomas and Davis. It highlights specific properties with potential for redevelopment and examines how brownfields redevelopment aligns with the community's needs for housing and business space.

The report concludes with recommendations and next steps the City of Thomas and its partners can take to accommodate future growth while making the area an even better place to live, work, and play.



Key findings

Growth

The greater Thomas area saw record levels of tourism in 2020 and 2021. Changes are already unfolding across the county due to this surge in visitors, and projections call for continued tourism growth in years to come. In addition, the planned Hyperloop Certification Center now promises to bring thousands more to the area within a few short years. Given the existing strains on infrastructure and community resources, this outlook for continued (and unprecedented) growth will add fuel to an already untenable situation.

Housing

Driven by a surge in demand from out-of-state homebuyers, sales and prices of homes in eastern Tucker County have soared since 2020. At the same time, local incomes have largely stagnated, and the overall supply of housing is declining as sold properties are being rapidly converted into short-term rentals. This combination of factors is deepening the county's housing crisis, particularly in Thomas, Davis, and Canaan Valley.

While there are at least 192 known housing units in varied stages of planning coming to Thomas and Davis in the coming years, the area needs 129 additional units of workforce housing to meet its existing needs. On top of that, several hundred additional housing units will be needed to accommodate growth from the planned Hyperloop Certification Center.

Workforce

With exceedingly few quality housing options under \$300,000, many people working essential jobs in the area—including in education, health care, service industry, and more—cannot afford to live in Thomas, Davis, or the surrounding area. Fueled in large part by lack of housing, businesses throughout the area are experiencing widespread staffing shortages.

Land and infrastructure

County economic developers maintain growing lists of businesses and individuals seeking to locate in the area; however, the lack of available, developable land and limited wastewater capacity present major bottlenecks to development county-wide.

Infill development

This report identifies nearly 22 unbuilt acres and 46,211 square feet of existing building space in Thomas and Davis as prime for infill development to meet the area's need for additional housing and business space. However, the need greatly exceeds the current availability of available, developable space in eastern Tucker County.

Next steps

The report's final recommendations capture the essential next steps that need to happen in order to best navigate the growth and changes that are forecasted for the greater Thomas area.

Brownfields redevelopment planning

Since 2014, the City of Thomas has worked closely with Downstream Strategies, Woodlands Development Group, New Historic Thomas, Green Rivers, and other partners on revitalization planning efforts funded by the U.S. Environmental Protection Agency (EPA) Brownfields Program.

During this timeframe, Downstream Strategies has served as the lead technical consultant and Licensed Remediation Specialist (LRS) for several grant-funded brownfields assessment projects for the City of Thomas. Staff from Downstream Strategies and local community development nonprofit Woodlands Development Group helped the City secure a series of EPA Brownfields Assessment and Cleanup Grants and are now helping the City redevelop several key downtown properties.

Downstream Strategies also performed a housing and small business needs assessment for Tucker County in 2014. The 2014 assessment was well-received by local governments and community stakeholders throughout Tucker County, and its data proved invaluable in helping build partnerships, secure grants, and leverage resources for development in the area. However, as time passed, the data in that report grew out of date—particularly given the rapid changes underway in the area in recent years.

As a result, in 2021 the City of Thomas commissioned Downstream Strategies to update and expand upon its 2014 Tucker County Housing and Small Business Needs Assessment report, incorporating the shifting market dynamics, recent developments, and the City's brownfields redevelopment progress. This report represents the culmination of this updated study.

This study was funded through the City of Thomas' FY17 Brownfields Assessment Grant.



Methods and data sources

For this study, Downstream Strategies utilized a wide range of primary and secondary data sources.

Market data was gathered from sources including the American Community Survey, the U.S. Census Bureau, the U.S. Department of Commerce, ESRI Business Analyst, Workforce West Virginia, housing market clearinghouses (including Realtor.com, Zillow.com, Rockethomes.com, and others), West Virginia University (WVU) Extension Service, Tucker County Convention and Visitors Bureau (CVB), and Dean Runyan Associates.

Analysis of developable properties was informed by geographic information systems (GIS) analysis and other data from the West Virginia GIS Technical Center, West Virginia Department of Tax and Revenue, and Woodlands Development Group. As part of this project, Downstream Strategies updated the City of Thomas' Blighted, Abandoned, and Dilapidated (BAD) Buildings inventory through field surveys. Data from this and prior BAD Buildings inventories further informed this analysis.

Community survey data was also heavily utilized in this study. Downstream Strategies designed and disseminated three surveys, which were updated from the firm's 2014 Tucker County Housing and Small Business Needs Assessment. These surveys targeted three specific audiences: 1) non-local visitors in Tucker County, 2) Tucker County residents, and 3) local businesses in Thomas and Davis. These surveys covered a wide range of topics.

Appendix A of this report provides a full chapter detailing design, methods, and findings of these surveys. Downstream Strategies also referred to extensive Tucker County survey data collected by WVU Extension Service's Doug Arbogast and Daniel Eades in 2016 and 2017.

Finally, the project team gleaned additional insights from more than thirty interviews with individuals from organizations including Best of Canaan Realty, Canaan Valley State Park, Cortland Acres, Milo's Cafe & Restaurant, Miners & Merchants Bank, Mountaintop Realty, TipTop Coffee, Thomas City Council, Trailhead Coffee, Tucker County CVB, Tucker County Development Authority, and Woodlands Development Group. We extend our sincere thanks to those who spent time helping us better understand the ever-changing dynamics within Thomas and Tucker County.





OPEN



COMMUNITY PROFILE

THOMAS, WEST VIRGINIA: THEN AND NOW

From its origins as an industrial center, Thomas' modern resurgence is linked to its growing arts scene and the rise of Tucker County's outdoor economy.

When Thomas incorporated in 1892, it was home to Davis Coal and Coke, which at the time was one of the largest coal companies in the world (West Virginia Explorer, 2021). Seven mines and over 1,000 coke ovens fell within 1.5 miles of Thomas, and the West Virginia Central & Pittsburg (WVC&P) Railway Company soon brought a railway station and machine shops to the community. Fueled by a bustling immigrant population, the area soon grew into a cosmopolitan center with nearly 5,000 people in its midst, boasting three hotels, a thriving commercial sector, an opera house, and West Virginia's only Italian-language newspaper. (Friends of Blackwater, 2021; Tucker County CVB, 2021; Vannorsdall, 2018).

As coal production in the area slowed after World War II, Thomas and its neighboring communities fell into a decades-long economic decline. Other industries in Thomas and surrounding towns shuttered their doors through the 1970s, and the railroad was removed in 1984 (Jones, 2021; Town of Davis, 2021). By the 2000 U.S. Census, Thomas' population had fallen to just 452 people (U.S. Census, 2021).

THOMAS Quick facts

- Population: 548
- Founded: 1892
- Size: 4.5 miles²

Things began to change in the early 2000s, most visibly led by the 2001 opening of the Purple Fiddle, a now well-renowned regional music venue and restaurant located in the former DePollo's General Store building. Soon thereafter, several artists set up communal art studios in empty buildings. Over the ensuing two decades, more artists and entrepreneurs moved to the area for its community and affordability, began fixing up old buildings, and eventually fueled the town's renaissance as an enclave for the arts. With its current population of 548, Thomas now boasts 12 open-door studios and art galleries and a growing list of other unique retail stores, businesses, and restaurants—many of which actively feature and promote local art. (Tucker Culture, 2021)



Thomas, W. Va. #

It is impossible to examine the City of Thomas in isolation without also considering the Town of Davis, its close neighbor, and its context within Tucker County. As a very small city, Thomas is part of a greater community that includes Davis and Canaan Valley. This report focuses on conditions and trends in this larger community, referred throughout the document as “the greater Thomas area.”



Davis, West Virginia

Less than three miles southeast of Thomas lies the town of Davis,

West Virginia (pop. 674). At 3,520 feet elevation, Davis is the highest incorporated town in the state. Like neighboring Thomas, Davis has also emerged from an industrial past: Founded in 1884, Davis was one of the earliest timber towns in West Virginia and also prospered through the textile, fur, and coal industries. Today Davis is best known for its world-class outdoor recreation opportunities and outstanding access to pristine and wild public lands, with direct access from downtown to several trail networks. Davis has become home to a thriving scene of local businesses, artisans, eateries, and breweries. Together these two communities have gained notice among the most desirable small towns in America. (Town of Davis, 2021)

- Population: 674
- Founded: 1884
- Size: 1.8 miles²

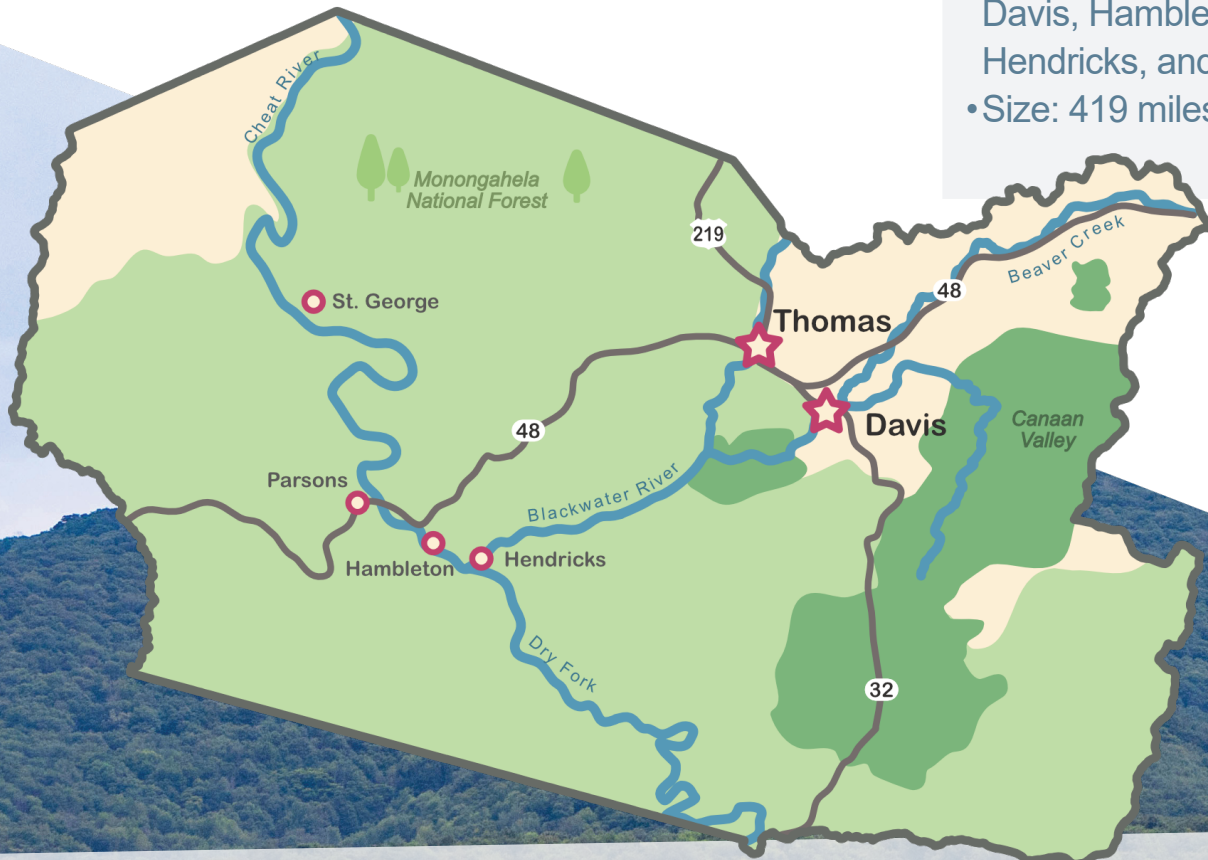
Quick facts
DAVIS

Tucker County, West Virginia

Nestled within the Potomac Highlands in northeastern West Virginia, Tucker County is renowned for its spectacular scenery. More than half of Tucker County's land is protected by federal, state, and other public entities.

TUCKER COUNTY Quick facts

- Population: 6,982
- Founded: 1856
- County seat: Parsons
- Other municipalities: Davis, Hambleton, Hendricks, and Thomas
- Size: 419 miles²



The close proximity between Thomas, Davis, and Canaan Valley ties the eastern half of Tucker County into a fairly cohesive community, spread out across different incorporated and unincorporated areas.

Tourism is largely concentrated in the eastern half of the county, driven by popular destinations including Blackwater Falls State Park, Canaan Valley Resort State Park, Timberline Mountain, Canaan Valley National Wildlife Refuge, Dolly Sods Wilderness, and more. Thomas, Davis, and the greater Canaan Valley area serve as the gateway communities to these key tourism amenities and capture the vast majority of the county's economic activity from outdoor recreation and tourism. Consequently this half of the county has

experienced tremendous growth in recent years and sees the heaviest demand for development.

The western half of the county includes the communities of Parsons (the county seat), Hambleton, Hendricks, and St. George. Though not far as the crow flies, these communities are more isolated from each other due to mountainous terrain and harsh winters. Inclement weather on mountain roads makes travel from one side of the county to the other particularly difficult during the winter months. However, this half of the county also claims many unique recreational and cultural assets, some that need to be further developed and/or promoted.

Outdoor recreation in Canaan Valley

Canaan Valley is a mecca for outdoor recreation. Fifteen miles long by three miles wide, Canaan Valley is the highest mountain valley east of the Rocky Mountains, with a base elevation of 3,100 feet (Parsons Advocate, 2015).

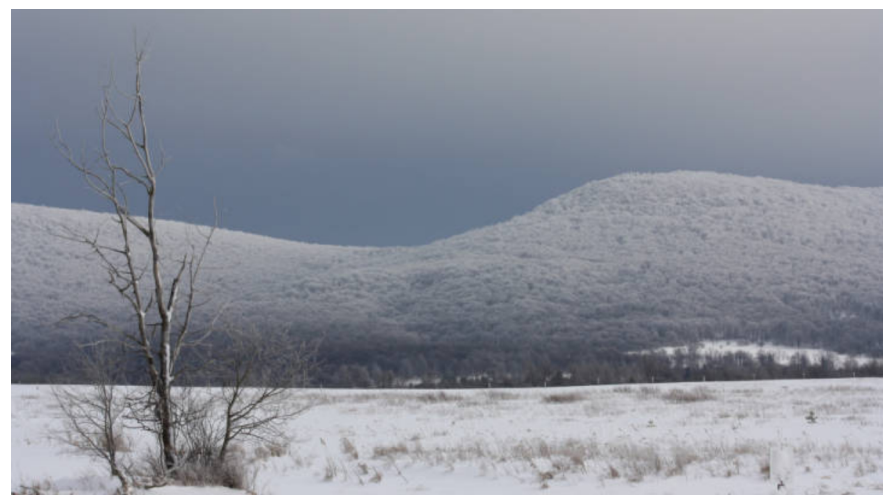
Driftland, West Virginia's first ski area, opened in Canaan Valley in 1950, and with the advent of larger ski resorts in the 1970s and 1980s, the area quickly gained a strong following as a major snowsports destination. While the area's three ski resorts—Canaan Valley Ski Resort, Timberline Mountain, and White Grass Ski Touring Center—continue to drive winter tourism, Canaan Valley has grown into a four-season destination (Jones, 2020). An epicenter of East Coast technical mountain biking since the 1980s, Davis and Canaan Valley continue to attract mountain bikers from far and wide. The area also offers world-class opportunities for hiking, backpacking, whitewater boating, hunting, fishing, and more.



Photo: Alan S. Heilman

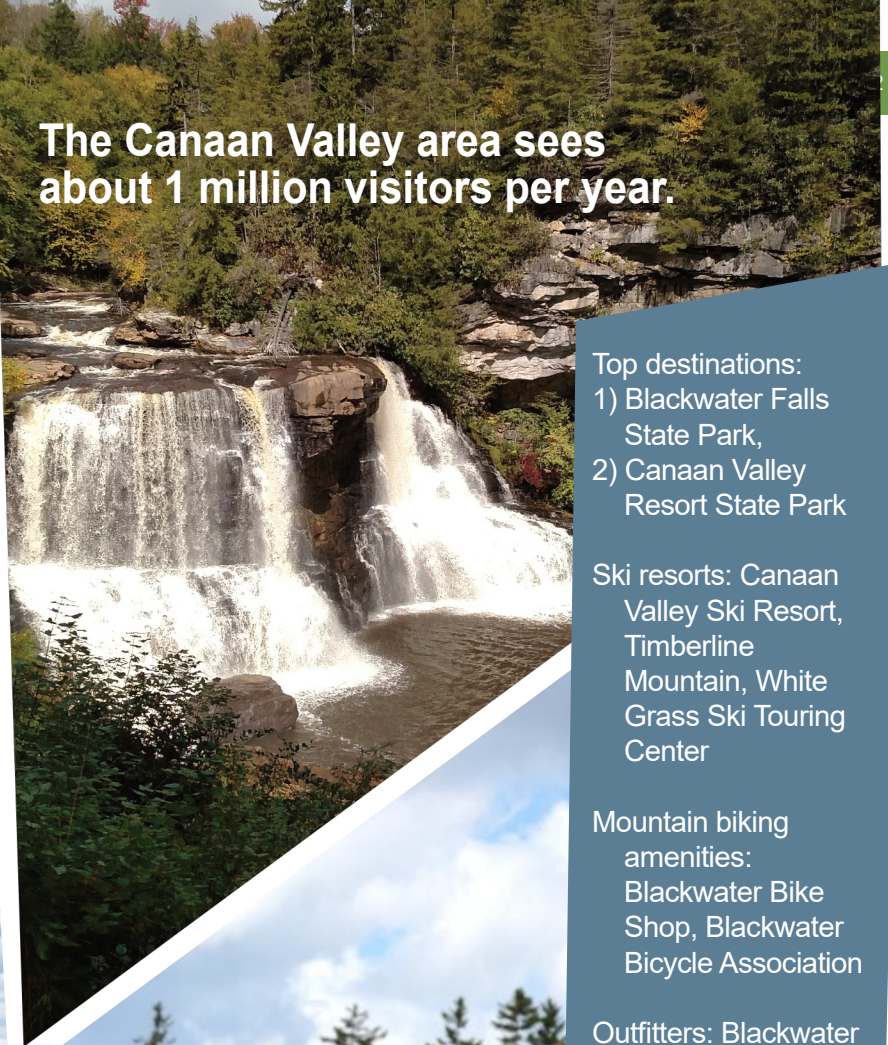


Photo: Nick Frazee



- Leisure and Hospitality businesses employ one-fifth of the Tucker County workforce and represent 27% of all private employment in the county (Eades, 2017)
- Tucker County's tourism businesses generate an estimated \$65 million in direct sales annually. These sales support 970 local jobs and generate \$44 million in income and taxes, including more than \$19 million in local wages and proprietors' incomes (Eades, 2017)

The Canaan Valley area sees about 1 million visitors per year.



Top destinations:
1) Blackwater Falls State Park,
2) Canaan Valley Resort State Park

Ski resorts: Canaan Valley Ski Resort, Timberline Mountain, White Grass Ski Touring Center

Mountain biking amenities:
Blackwater Bike Shop, Blackwater Bicycle Association

Outfitters: Blackwater Outdoor Adventures

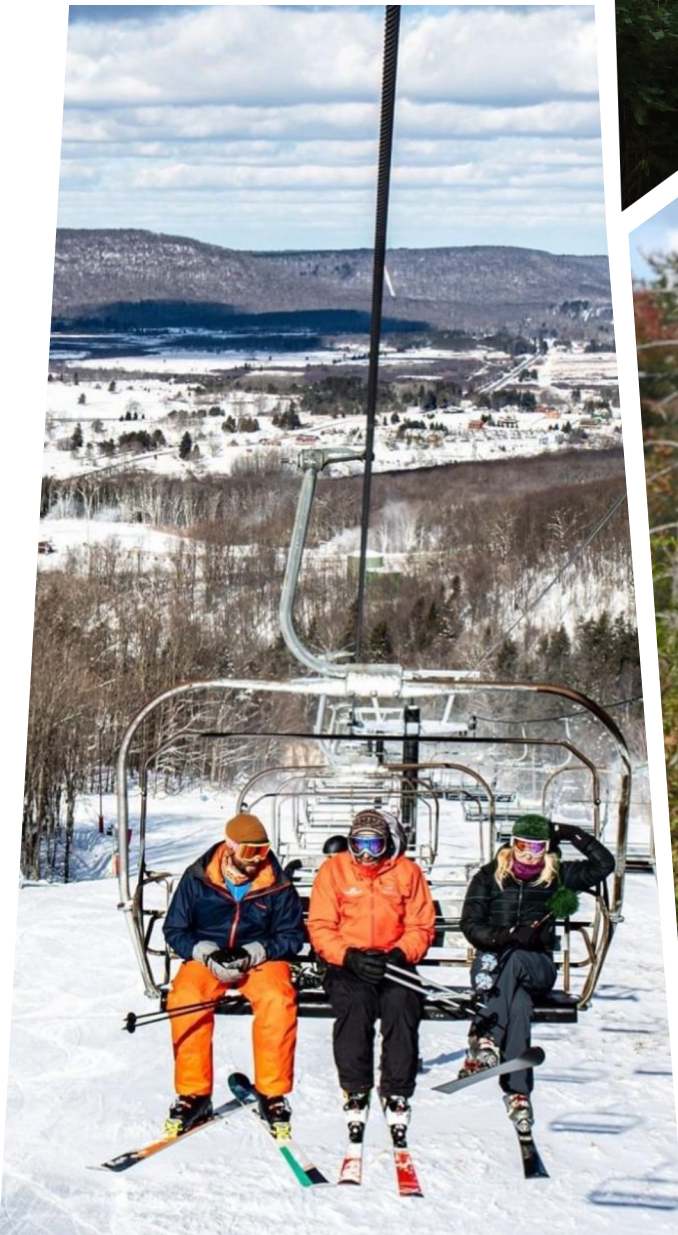


Photo: Elkins-Randolph

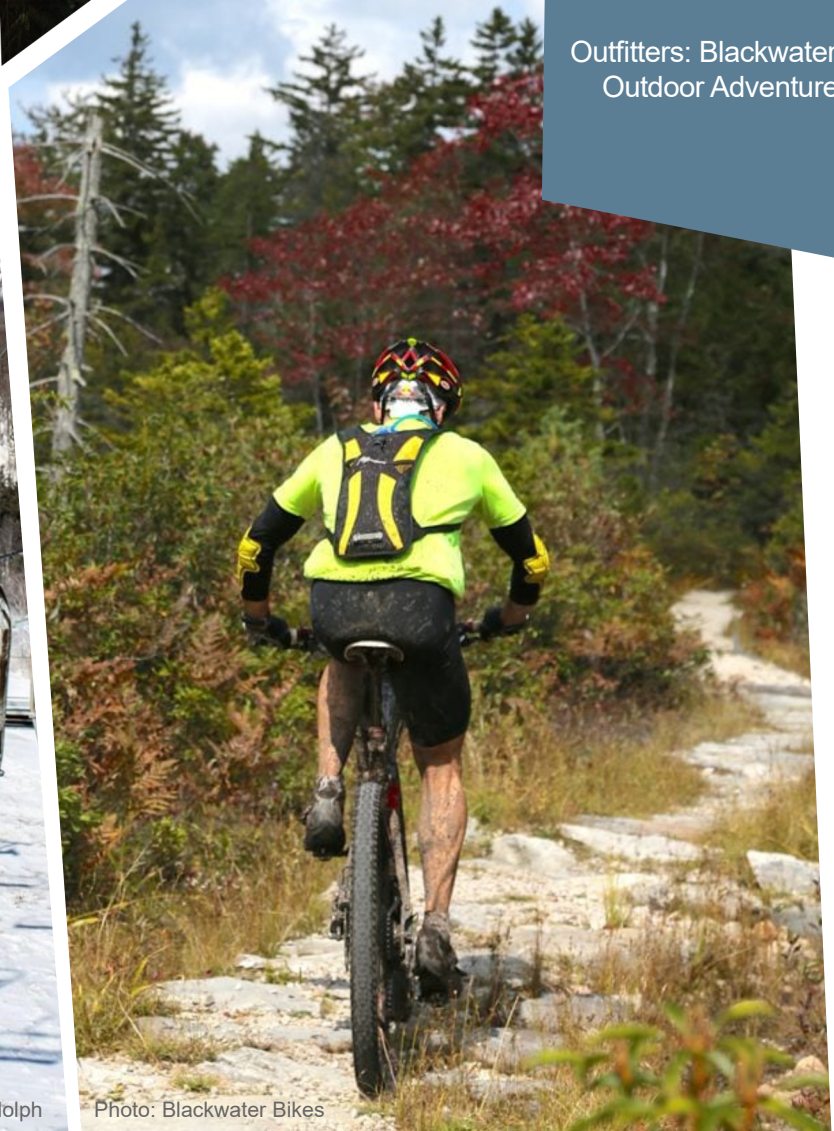
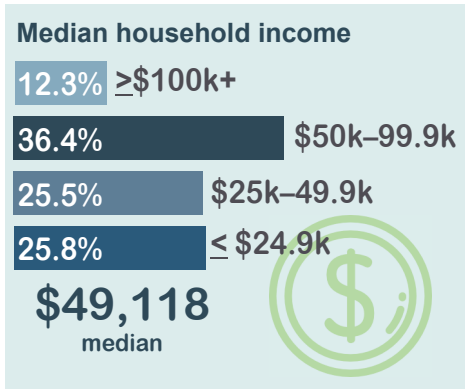
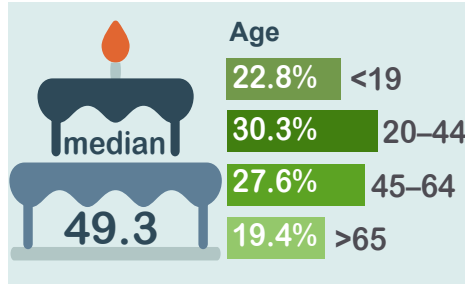


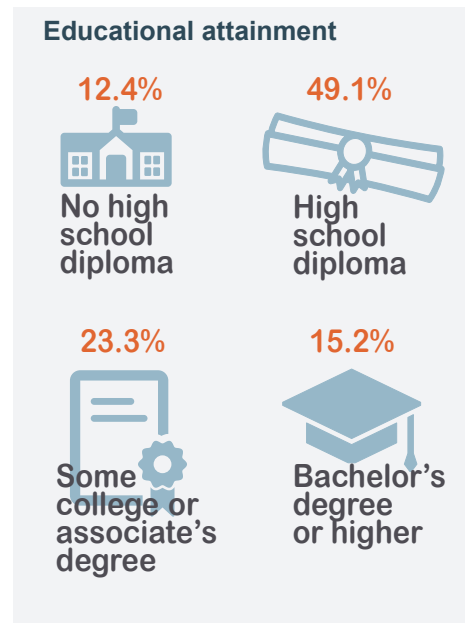
Photo: Blackwater Bikes

Tucker County

Demographics and economy

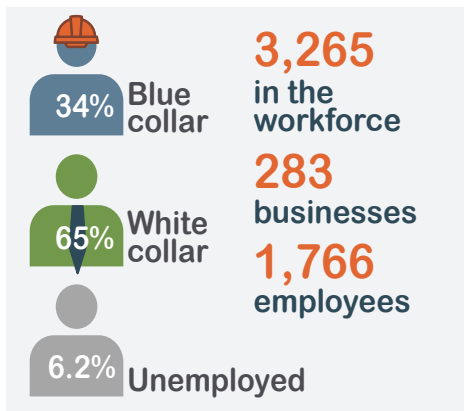
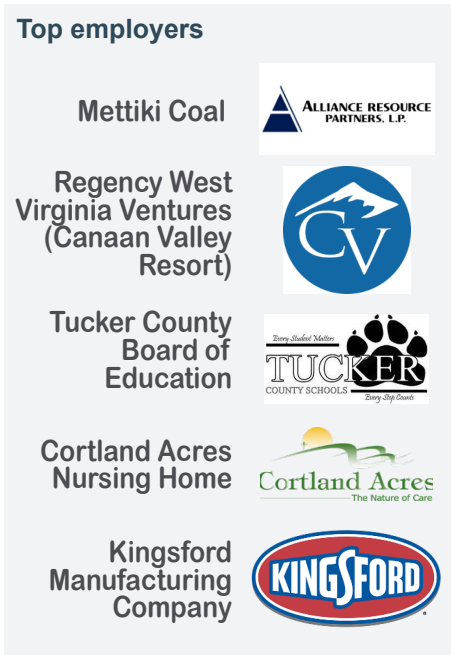
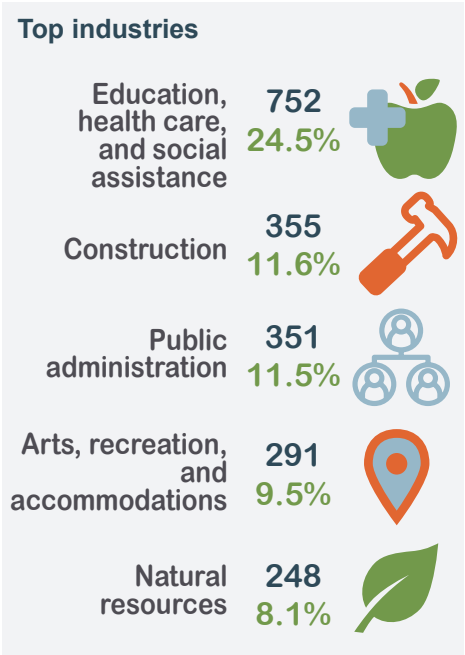


Workforce



Workforce

While unemployment is low in Tucker County, it is common for residents to work multiple (often seasonal and low wage) jobs. Local employment opportunities in Thomas and Davis are dominated by jobs in the service industry or with the state. While job opportunities and wages were long stagnant, both are now rising, particularly as the service industry demand grows with the booming tourism economy. However, the county struggles with workforce availability challenges in which employers simply cannot find enough workers. As explored in detail throughout this report, workforce housing is a major factor contributing to these workforce challenges.



Demographics	Tucker County	Thomas	Davis
Population	6,982	548	674
Median age	49.3	50.5	50.8
Median household income	\$49,118	\$42,162	\$45,836
Population growth (2019-2020)	-0.04%	+0.36%	-0.25%

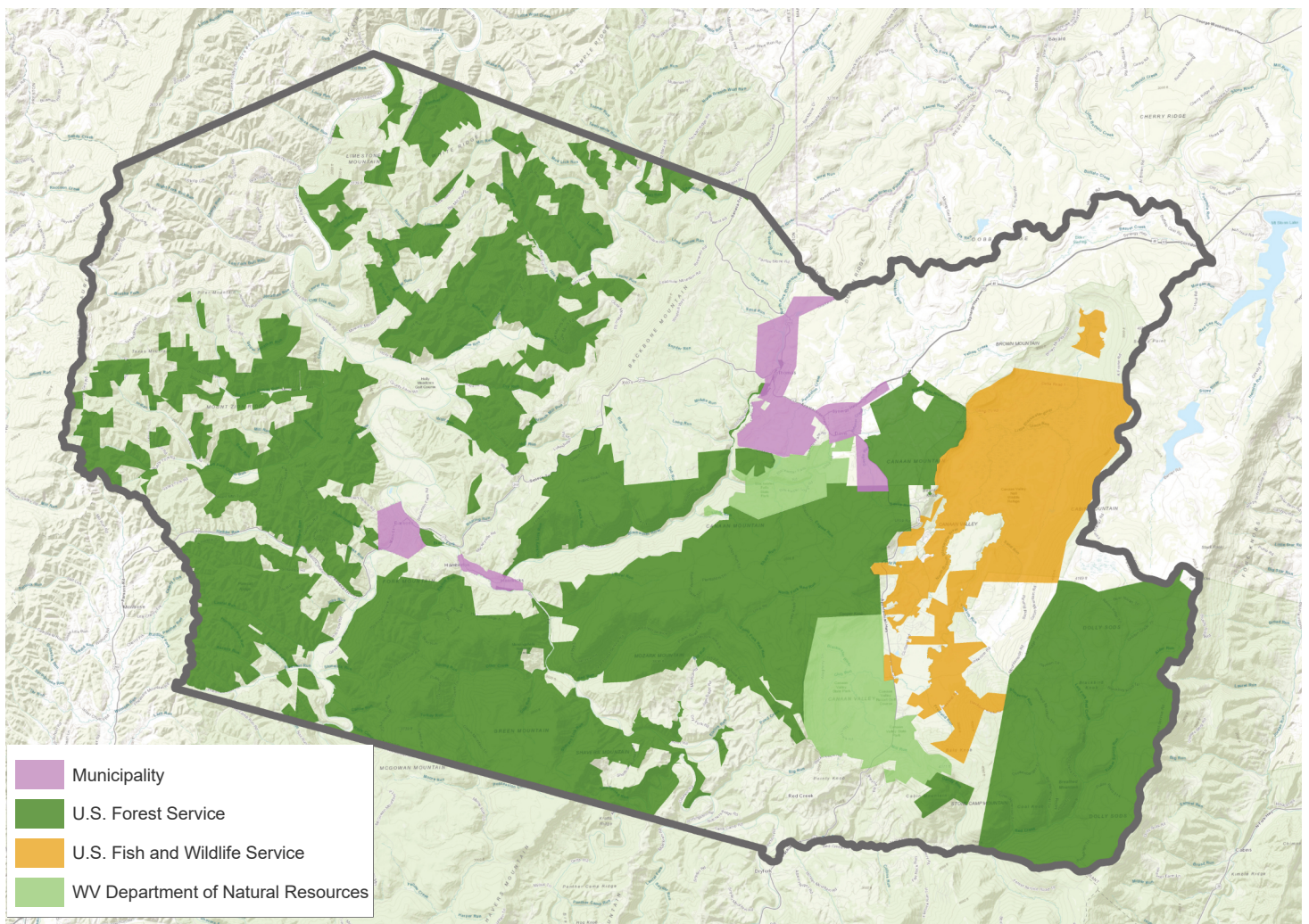
(Sources: [bc] WORKSHOP, 2019; American Community Survey, 2019; WorkForce WV, 2021)

Development considerations in Tucker County

The spectacular landscape of Tucker County is a big part of what makes this corner of West Virginia so unique and universally treasured. Yet when it comes to development, the county's geography presents a number of challenges for where development can occur.

First, much of Tucker County is simply not available for development. More than half (53.5%) of Tucker County land is protected by state and federal government. After public land, privately owned forest land

makes up the second-largest block of land in the county. Much of this land is held by a handful of companies with no known plans to sell any major tracts of land. Based on County calculations, **only 20% of land makes up the tax base**, and much of that land is not appropriate for development due to steep slopes, floodplain, wetlands, boulders, and other limiting factors. As a result, developable land in Tucker County is extremely limited. (Tucker County Planning Commission, 2014)



Public land ownership in Tucker County

In addition to the lack of available land, development costs in Tucker County are often extremely cost prohibitive for small businesses. The cost of extending utilities to outlying areas is high, given that many areas lack adequate density of customers along the extension to justify the costs. Site preparation costs are also high due to the area's steep, rural terrain.

The availability of water and sewer in the county is another major factor that limits where development can easily occur. The county's rugged terrain, soil characteristics, and sensitive ecosystems are generally linked with poor compatibility for septic systems. As a result, developments in outlying areas generally require either the creation of a new package plant or connection to an existing wastewater system—both of which are extremely costly.

In addition, the State Fire Code requires new commercial developments over 10,000 square feet to have automatic sprinkler systems installed for fire suppression. This poses a limit on developments in outlying areas, as increased distance and elevation gain from the water system reduces the water pressure available for fire suppression.

Tucker County is an outlier in some respects. It features prominent landscapes, such as Canaan Valley and Dolly Sods, with high-elevation boreal habitats more common in Maine and Canada than in Appalachia. Likewise, the predominance of public land in the county is also fairly unusual for West Virginia. The dynamics for development in Tucker County are more similar to those of many communities in the western U.S., who are constrained by vast swaths of land that are either publicly protected or held privately for resource extraction.

Top three landowners in Tucker County

1. Federal government: 118,306 acres
2. Western Pocahontas Properties, Ltd.: 38,000 acres
3. West Virginia State Parks: 8,762 acres

Market trends

Since the late 2010s, a convergence of market forces have set the stage for Tucker County to see a tremendous influx in visitors and new residents.

Broadband and satellite internet improvements

As the modern workplace grows increasingly reliant on high-speed internet, better internet connectivity opens the door for people to work remotely. Though much work remains to bring competitive internet speeds to Tucker County, a growing number of individuals with computer-based employment have sought out Thomas, Davis, and Canaan Valley as destinations from which they can work remotely while enjoying small town charm and unparalleled access to the outdoors. Many projects to bring higher speeds to the county are in various stages of planning and/or implementation.

Improved access to urban markets

With the recent completion of Corridor H (U.S. Route 48), drivers from the suburbs of Washington, D.C. can now reach this once tucked-away corner of West Virginia in under three hours. This improved transportation link has significantly increased eastern Tucker County's access to large urban markets.

When Corridor H is fully completed, it will connect Interstate 79 (I-79) in Weston to Interstate 81 (I-81) in Strasburg, Virginia. As a result, once the last remaining 31-mile stretch of Corridor H is built from Kerens in Randolph County to Davis, Tucker County will be fully accessible from major interstates. (West Virginia Office of the Governor, 2021)

E-commerce

The rise of e-commerce has radically transformed access to goods and materials in rural America. While physical retail shopping venues continue to be limited in Tucker County, Amazon and other online retailers make goods that were once inaccessible in most rural communities available within a few clicks. This represents a major quality of life enhancement for rural areas.

While these factors set the stage for long-term growth, a range of unforeseen factors in 2020 then created a perfect storm in which massive changes took place in Tucker County.

Shifting dynamics

In early 2020, the COVID-19 pandemic took full swing and set in motion a mass exodus among those with means out of big cities and major urban areas. Rural places accessible by car like Tucker County were suddenly perceived as safe locations, given the low population density, and outdoor recreation soared nation-wide as families were suddenly forced outdoors for safe outlets.

As a result, Tucker County's out-of-town visitor numbers exploded nearly overnight. According to the Tucker County CVB, Tucker County had seen several years with a steady uptick in visitors; however, 2020 brought record-breaking numbers of visitors to Tucker County, most of whom were concentrated in Canaan Valley, Thomas, and Davis (Waldo, 2021).

In a typical year, Tucker County sees peak tourism in the winter and summer, followed by slow seasons in the spring and late fall.

2020 began with a bang with the grand reopening of Timberline Mountain, after two years of closure (Schoolcraft, 2020). Heavy promotion of the newly expanded and enhanced resort coinciding with the start of the pandemic made for a strong winter season. But the visitors kept pouring in, season after season, in record numbers (Waldo, 2021).

Incredibly, regional tourism and outdoor recreation officials agree that visitation in 2021 is on track to surpass the record breaking numbers of 2020. State park traffic counts show that overall visitation at Blackwater Falls and Canaan Valley Resort increased 27% from fiscal year (FY) 2019–20 to FY 2020–21¹. Total traffic counts for the first half of the year at these two flagship destinations more than doubled from 2020 to 2021. (Beafore, 2021)

The influx of new visitors to the area also drove the housing market in Tucker County to new heights. According to realtors in Tucker County...

Listing prices in the eastern half of the county roughly doubled from 2019 to 2020.

The number of home sales doubled from 2019 to 2020, and 2021 is on track to surpass 2020 sales.

Property values have increased by *at least 25% across the entire county* in that same timeframe. In the Canaan Valley area, values have generally doubled in the last year. (Barb, 2021; Johnson, 2021).



¹State park fiscal year counts run from July 1 through June 30.

According to area realtors and businesses, most of this increased demand was driven by people from the greater Washington, D.C. metropolitan area. According to one realtor, “these are people from D.C. and northern Virginia with high expendable incomes. For them, Tucker County homes are very affordable compared to D.C. prices. They can leave their place in the city and be here in under three hours, where it’s 20 degrees cooler, with outdoors all around” (Johnson, 2021). While realtors see some out-of-state home buyers interested in relocating full-time to the area, the majority are looking for a property in Tucker County to use as second-home and short-term rental (Barb, 2021; Johnson, 2021).

A full breakdown of the housing market is provided in the Market Assessment.

While these trends have affected all of eastern (and, to a lesser degree, western) Tucker County, Thomas and Davis emerged as particularly desirable locations. Both communities offer unparalleled access to the outdoors during a pandemic, as well as upscale coffee shops, breweries, and hip offerings that appeal to more urban sensibilities. Already on the rise as destinations in their own right, since 2020 Thomas and Davis have been flooded with visitors like never before.





Virgin Hyperloop Certification Center

On October 8, 2020, Virgin Hyperloop announced that it will locate a certification facility on nearly 800 acres of land spanning Tucker and Grant counties.

While a number of companies are working on this technology, Virgin Hyperloop is the only company in the world that has successfully tested hyperloop technology at scale using electric propulsion and electromagnetic levitation under near-vacuum conditions. The company is now working with governments, partners, and investors around the world to make hyperloop a reality. (Virgin Hyperloop, 2020)

Known as the **Hyperloop Certification Center**, the planned West Virginia facility will play a key role in demonstrating to regulators and certifiers that this proven technology works and is safe for passengers (WVU Today, 2020).

The Hyperloop Certification Center will be located on a seven-mile long site near Mt. Storm on land donated by Western Pocahontas Properties to the WVU Foundation in partnership with Virgin Hyperloop (Blazina, 2020; WVU Today, 2020). The \$500 million facility will include:

- a welcome center,
- a certification track and operations center,
- a pod final assembly facility,
- a production development test center, and
- an operations, maintenance, and safety training center.

Construction of the \$500 million facility is scheduled to begin in 2022. Safety certification is anticipated by 2025, and Virgin Hyperloop hopes to be carrying passenger traffic by 2030 (Thomas, 2020).

The West Virginia University Bureau of Business and Economic Research predicts the total economic impact of the center's ongoing operation on the West Virginia economy to be \$48 million annually (WVU Today, 2020).

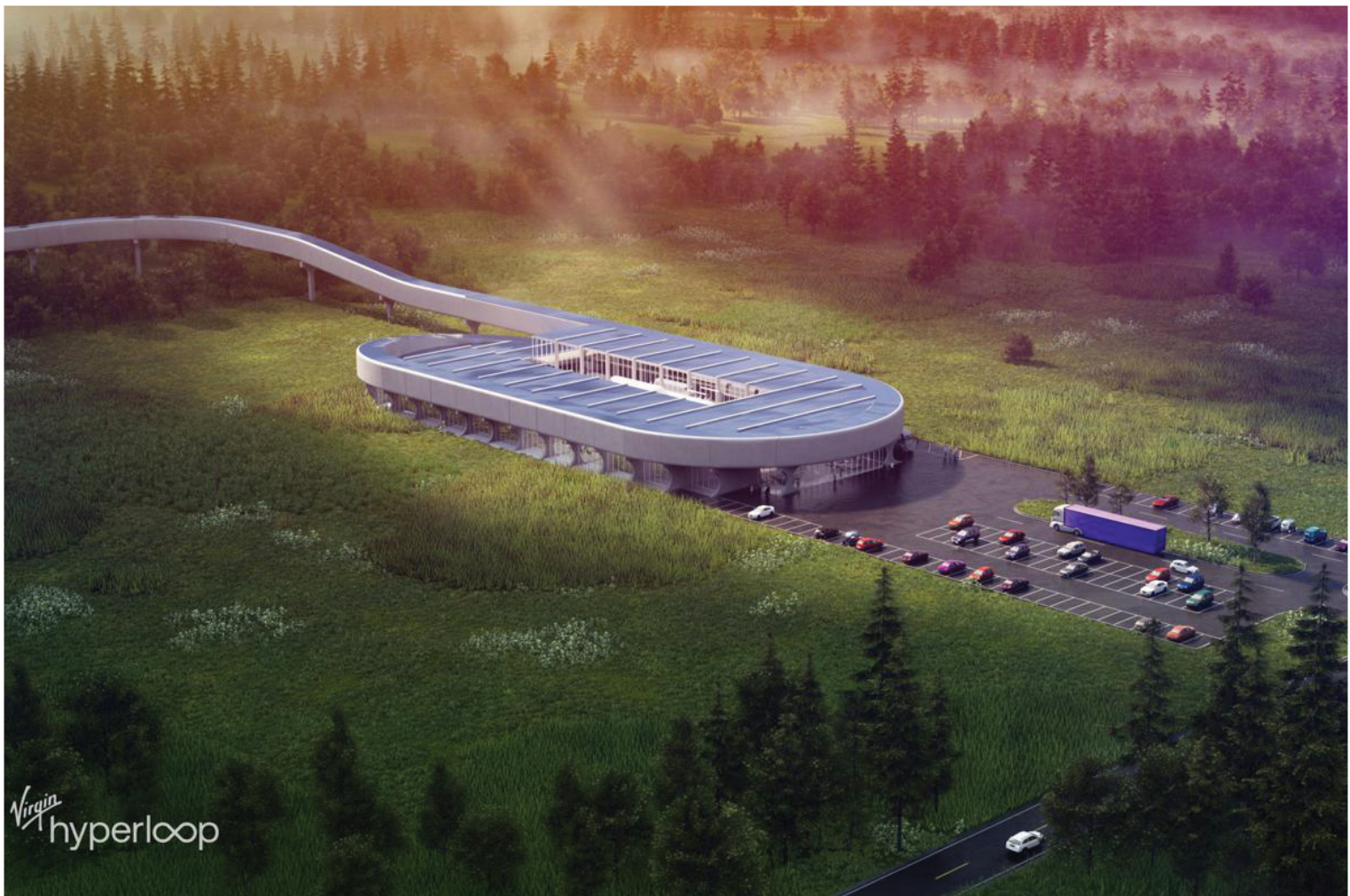
Hyperloop is a new form of ground transport currently in development that moves people and goods in pods through a vacuum tube at speeds exceeding 600 miles per hour. This technology will enable travel from Pittsburgh to Chicago in 41 minutes or New York City to Washington, D.C. in just 30 minutes. (WVU Today, 2020)

What will this facility mean for Tucker County?

Virgin Hyperloop anticipates the Hyperloop Certification Center will result in the creation of **150–200 permanent jobs** for skilled engineers and technicians. This will mean an influx of **high-paying, skilled jobs** to the immediate area. Project leaders estimate the Certification Center's construction will create another 7,300 jobs, plus an additional 6,000 jobs created once the facility is operational (Thomas, 2020).

As the closest towns to the planned facility, Thomas and Davis stand likely to benefit from increased population and economic activity from the Hyperloop Certification Center. However, the advent of the Hyperloop Certification Center will also bring changes to the community.

Assuming many (if not most) of the facility's skilled workers relocate in Thomas, Davis, and/or Canaan Valley, the area will likely see increases in educational attainment and household income levels. In a county in which only 15% of the population had a bachelor's degree or higher in 2019, such changes could result in sizable demographic and cultural changes within the community. This will in turn increase the local tax base for the City of Thomas, the Town of Davis, and Tucker County. However, it will also further fuel local demand for housing, infrastructure, and other services, all of which are currently overstrained serving existing residents and visitors.



Overall outlook for growth

Up until very recently, the county's outlook for population decline was predicted to continue.

Traditional projections, based on past years' Census figures, predict continued slow population decline for Thomas (-0.2%), Davis (-0.22%), and Tucker County (-0.12%) from 2020–2025 (Esri Business Analyst, 2021). However, after decades-long declines in population and economy, Tucker County now sees a rapidly changing future.

Most authorities on Tucker County tourism agree that the current tourism surge may level out somewhat as the pandemic subsides, other competing recreation industries rebound, and families shift back to pre-pandemic routines.

However, now that Tucker County has emerged as a prime destination for major urban markets, the outlook for the county's burgeoning tourism industry is one of continued, significant growth. In short, this once tucked-away corner of West Virginia faces a future in which crowds of tourists will likely become the "new normal." At the same time, Virgin Hyperloop's planned

Hyperloop Certification Center facility in Tucker and Grant counties presents a dramatic, game-changing opportunity to the area. **If even a modest 10% of the 13,000 workers associated with the Certification Center development relocate to the Thomas-Davis area, that would more than double the current combined population of those two communities.**

In an area still recovering from decades of economic decline, this influx of new residents and visitors represents a tremendous opportunity for economic expansion. However, as discussed in the following sections of this report, Thomas, Davis, and Tucker County have severe limitations on local infrastructure that already strain their ability to accommodate the current population.

As a result, addressing community and county-level infrastructure needs now is critical to ensuring Tucker County can accommodate—and benefit from—anticipated future growth.



Creature

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MARKET ASSESSMENT

HOUSING ASSESSMENT

While housing is important for any community, it is especially critical in Tucker County. Downstream Strategies' 2014 Tucker County Housing and Small Business Needs Assessment cited growing housing demand, particularly in Thomas and Davis, coupled with an existing shortage of workforce housing (Downstream Strategies, 2014).

Housing market trends

The housing market in eastern Tucker County was on a steady but gradual upward trend in the late 2010s, with the completion of the Davis section of Corridor H, historically low interest rates, and the reopening of Timberline Mountain. Then, with the advent of COVID-19 and Tucker County's emergence as a prime getaway location for urban families, the housing market blew up, nearly overnight.

For many years, properties for sale in Tucker County would sometimes sit on the market for years. Today, the average real estate listing in the county stays on the market for 55 days (Zillow, 2021; Rocket Homes, 2021). According to local realtors, *properties in Thomas, Davis, and Canaan Valley typically sell within 10–15*

Given the influx of people to the area in recent years, affordable housing in eastern Tucker County has become a major issue, with ramifications felt at all levels of the local and regional economies. Now, with Hyperloop's major development on the horizon, Thomas, Davis, and Canaan Valley face unprecedented pressure for housing.

days, and any property connected to the resorts is generally under contract *within five days* (Johnston, 2021).

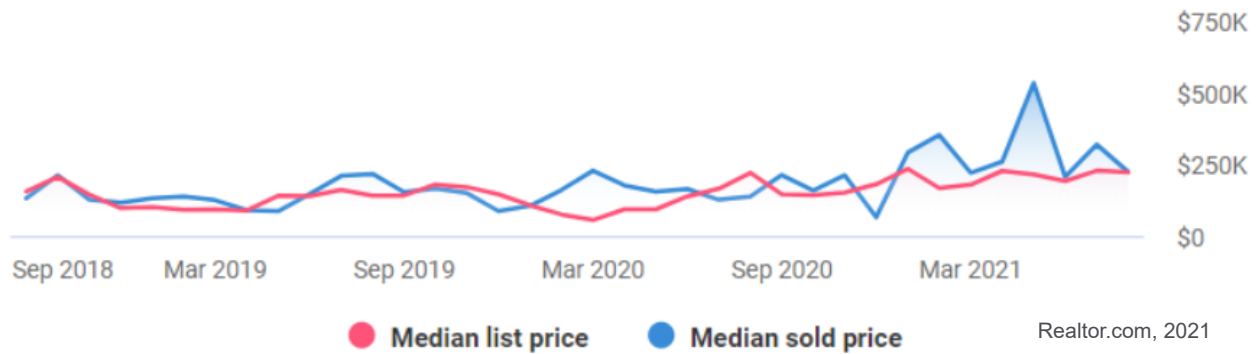
As a result, the area has seen a surge in home sales. One realtor noted going from 75 homes for sale in the area at the start of 2020 to *only five homes available* at the year's end. Nearly 100% of properties for sale turned over, and they sold at record-setting prices. In a county long known for its relatively affordable housing, home prices in Tucker County soared in 2020 and have continued on an exponential rise since, as the overall demand for housing continues to rise in lock step with overall visitation.



Tucker County, WV Housing Market 📍

In July 2021, the median list price of homes in Tucker County, WV was \$220K, flat year-over-year. The median listing price per square foot was \$178. The median sale price was \$221.8K.

Median List Price vs. Median Sold Price



Homebuyer demographics

What types of buyers are driving the surge in the housing market?

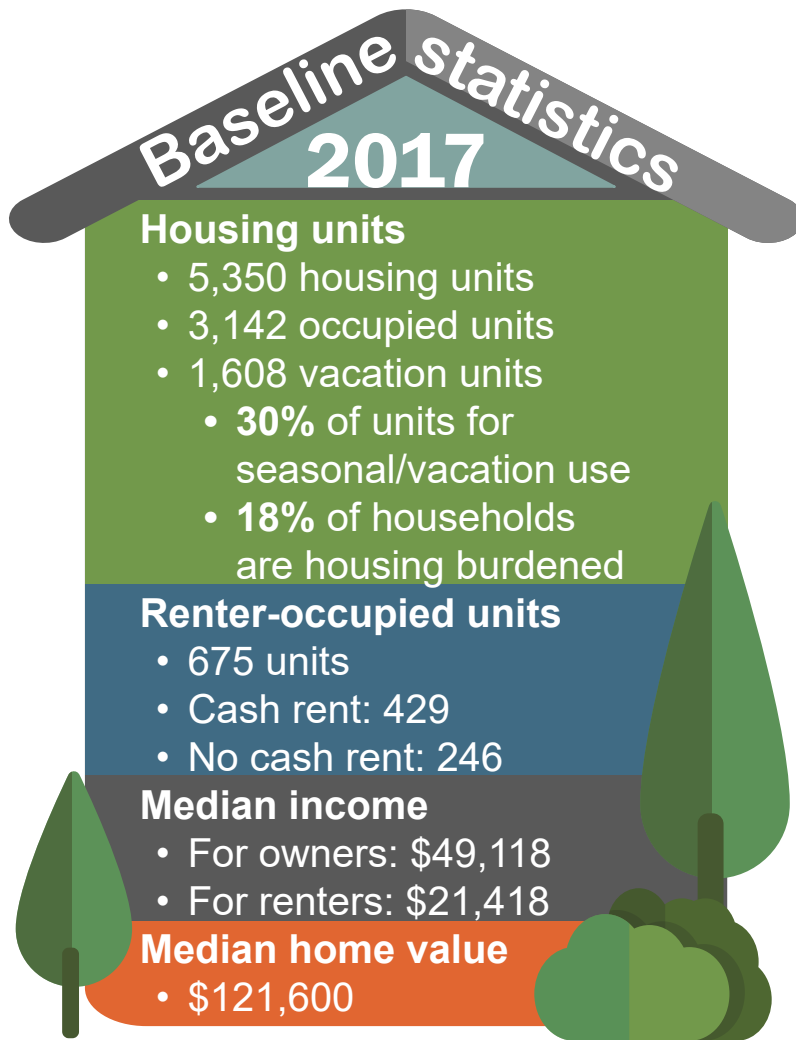
According to local realtors, their clients fall into two main categories:

- The vast majority of homebuyers are non-local people, generally families with children from northern Virginia and Washington, D.C. During the peak of COVID-19, people seeking a small-town getaway and pandemic refuge were buying properties sight-unseen, and paying prices that would have seemed outrageous in 2019. Most are looking for a second home with potential to generate income as a short-term rental when they return to the city. Others may have relocated temporarily (and a few, permanently) while working in their existing jobs remotely.
- A smaller but prominent second group of homebuyers are local people looking for long-term housing in the area. According to one realtor, “They’re looking for a lower-end, affordable home that doesn’t need significant work. Unfortunately those homes just don’t exist here.” (Barb, 2021; Johnston, 2021)

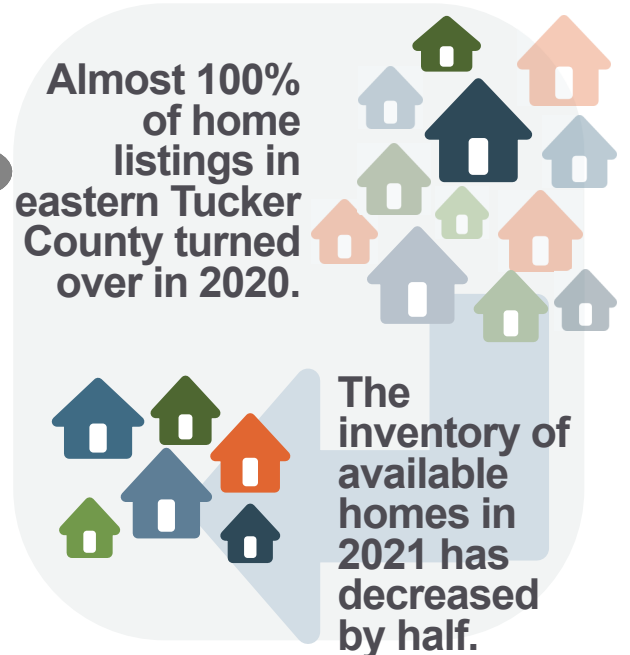
While remote work opportunities make places like Tucker County increasingly attractive places to live, realtors say fewer than 25% of their non-local clients intend to move full-time to the area. The vast majority seek second homes. (Johnston, 2021).

Given the very limited availability of homes in the county, fierce competition for available properties is driving up prices. While non-local homebuyers can afford to pay the inflated prices (which are still quite affordable compared to homes in the D.C. metro area), **many in the local workforce cannot compete in bidding wars and are now largely priced out of the market.**

Tucker County housing market

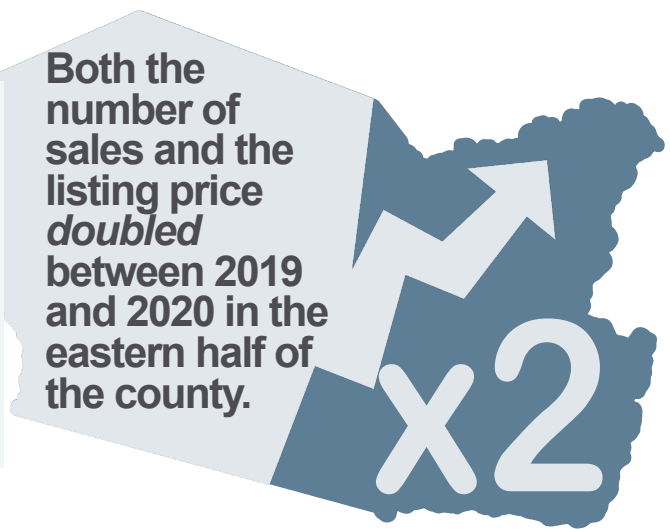


Market changes since 2020



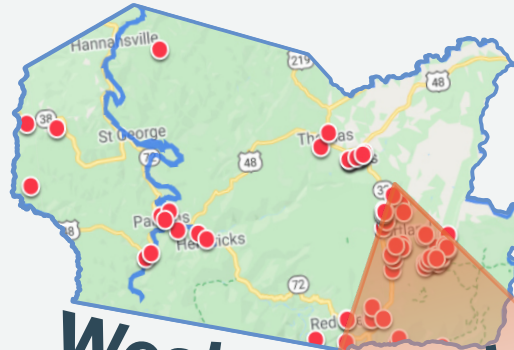
County-wide home prices 2021

Average estimated home value	\$113,061	Typical starting price to build a new home	\$300,000+
Median sale price	\$221,800		
Median listing price	\$284,500		



The housing markets differ wildly between the eastern and western halves of Tucker County.

Western Tucker County has significantly lower housing prices and values. Homes in Parsons, St. George, and Hendricks can still be found occasionally in the \$100,000 range, though prices and demand are now rising with the county's overall demand.



Eastern Tucker County drives the market. Typical three-bedroom homes in Canaan Valley now range from \$300,000–500,000. In the Canaan Valley area, values have generally doubled in the last year.

Quality workforce-level housing in the \$100,000–200,000 range is exceedingly scarce.

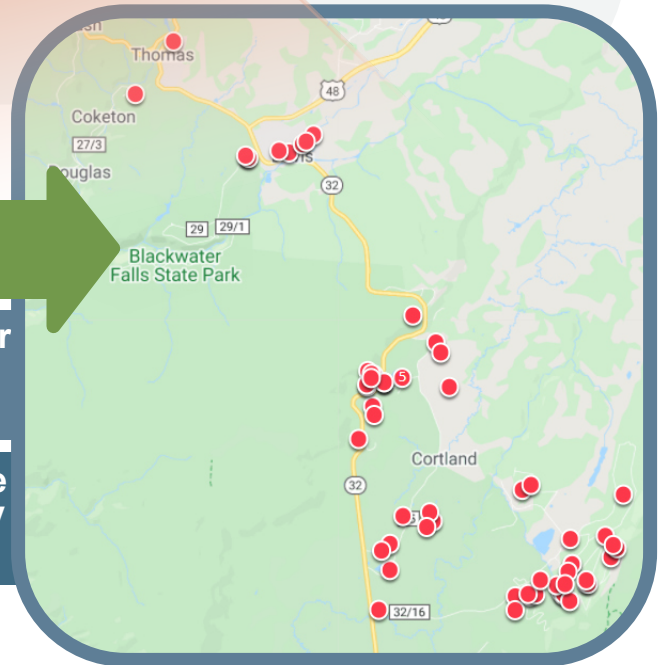
West vs. East

Property values have increased by *at least 25%* across the entire county in that same timeframe.

Homes in the east

Thomas is an extremely desirable location for homebuyers, but there is very little home turnover.

Most of the available homes in this half of the county are concentrated in the Canaan Valley area, which are generally higher in price.



"I have clients who sold a condo in Canaan Valley last year with the intention of building a house. But now that house they had intended to build has doubled in price, and it will now take four years to build."

—Local realtor

In 2019 a home in Old Timberline sold for \$205,000—the exact same price the first owners bought it for in the 1980s. In 2021, that same home would go for \$500,000.

In 2020, a 600-square-foot condo in Canaan Valley previously valued at \$47,000 listed at \$125,000 sold within 24 hours.



Recent sales

Footnote: All numbers reflect estimates current as of August 2021.

Sources: Barb, 2021; Johnston, 2021; Leyh, 2021; Realtor.com, 2021; Rocket Homes, 2021; Zillow, 2021

Housing affordability

Let's imagine a young working family wants to live in Thomas, West Virginia. Can they afford to buy a home there?



First, this family would likely have to broaden their search area, simply because there are exceedingly few homes available in Thomas. This means the family will more likely be looking in Canaan Valley or Davis, which have more options.

Next, the family will have to evaluate what options exist within their price range. As of summer 2021, modest three-bedroom homes in Canaan Valley begin around \$300,000. If they are able to obtain a lot, a contractor, and a wastewater permit, they face a similar starting price range (\$300,000 and up) to build a home, though material availability and construction costs have been highly variable since 2020.

As of mid-August 2021, Zillow shows two properties for sale in Thomas: a six-bedroom home priced at \$395,000 and a 1.57-acre lot listed at \$49,000 (Zillow, 2021).



In order to afford a \$300,000 home, the family would need to:

- **earn at least \$74,720 per year, and**
- **have good credit and \$60,000 cash on hand for a down payment.**

Even at that level, they would be considered housing burdened—meaning that 30% of the household's income is spent on housing.

A household is considered housing burdened if it spends more than 30% of its income on housing costs, including utilities. The U.S. Department of Housing and Urban Development (HUD) and other agencies generally use 30% as a threshold for considering the maximum amount a household should spend on housing per month.

According to a 2021 Downstream Strategies survey of Tucker County residents, 48% of surveyed residents reported that they are unable to change their current housing situation. The most commonly cited reason (67%) was that too few homes are available within their price and/or size range. Nearly two-thirds responded that other housing options are too expensive.

Overall, however, over 80% of respondents cited being satisfied with their current housing situation. (Downstream Strategies, 2021a)

Workforce housing

Like many rural resort destinations, incomes of Tucker County residents fall well below incomes of the tourists who visit the area. According to the American Community Survey, the median household income for Tucker County was \$49,118 in 2019; for Thomas, the median household income was \$38,750 (ACS, 2019). HUD's measures for area median income in Tucker County are slightly higher (\$58,500) as they are based on a family size of four people (HUD, 2021).

The Tucker County Workforce Housing Task Force considers workforce housing to include families making 60–120% of the area median income, which corresponds to family incomes of roughly \$35,000–70,000 per year. Much, if not most, of the County's workforce falls within this income range, including many employees of the two state parks, the school district, the Rubenstein Juvenile Center, restaurants, and a wide range of other service industry businesses.

Thomas, Davis, and Canaan Valley have exceedingly few quality options for homes

within the \$100,000–200,000 range. As shown in the table below, a family of four earning the area median income (\$58,500) can afford, at most, a \$220,000 home in Tucker County. As of mid-August 2021, Zillow shows 12 housing listings in the entire eastern half of the county. Roughly eight of those listings are condos ranging from 500 to 700 square feet. The remaining four are homes under 2,000 square feet in need of significant renovation. Broadening the search to include the entire county yields an additional eight properties listed at or below \$220,000.

As a result, workforce-level families are now largely priced out of the housing market in Thomas, Davis, and Canaan Valley.

This has major ramifications for the local economy, which is dealing with persistent workforce shortages. Workers and their families are limited to either renting (also in short supply) or commuting from elsewhere, which poses additional challenges during the region's notorious inclement winter weather.

The Tucker County Workforce Housing Task Force, created in 2019, is a committee of community leaders and employers convened by the Tucker County Development Authority and Woodlands Development Group, focused on addressing the lack of housing for businesses and their employees.

Fifty-five percent of Tucker County visitors surveyed by West Virginia University (WVU) in 2015 and 2016 earned over \$80,000 per year. That's more than *double* the median household income for Thomas. (Eades, 2017)

How much can Tucker County's workforce afford for housing?	60% AMI	100% AMI	120% AMI
Annual income	\$31,500	\$58,500	\$70,000
Maximum affordable monthly house payment	\$728	\$1,313	\$1,605
Maximum affordable home price	\$120,000	\$220,000	\$270,000

Notes: Maximum affordability was based on 30% of monthly income, factoring in an additional \$150 per month for utilities. Home prices in this scenario assume a 30-year mortgage with 20% down at 4% interest.

Quantifying the housing need

Total need

The demand for homes in Thomas and Tucker County is clearly outpacing the supply of available housing. So how many units of housing does the area need in order to meet the demand?

Downstream Strategies estimated the overall need and supply for workforce housing in Tucker County, based on income and housing data from the American Community Survey. Much of the best available Census data for this methodology comes from 2015–2017 and thus does not capture the recent market changes since 2020. However, it does provide an approximate baseline of Tucker County’s housing need before the market surge in 2020.

According to this methodology, Tucker County was already short 321 workforce-level homes before the tremendous market surge in 2020. Most of that need would be concentrated in the Thomas, Davis, and Canaan Valley area.

Now, Hyperloop plans to bring 150–200 permanent, skilled jobs to the community plus as many as 13,000 additional jobs. Many of these workers, particularly the skilled workers at the facility, will want to live locally in the greater Thomas-Davis community. This will create new demand for housing of all types and price ranges, on top of the existing 321 unit deficit for workforce-level homes in the greater Thomas area.

	Household income	Demand	Supply	Surplus/Deficit
Moderate-income owners and renters	\$39,786–58,942*	677 people	356 units	-321 units

*Note: The methodology used for this analysis defines “moderate income” as households earning from 81% to 120% of the County’s median household income.

As working families become priced out of buying a home in Tucker County, renting is the next best option. However, market-rate, long-term rentals represent under 14% of total housing in the county, and they are generally occupied by a lower-income demographic: **The median household income for renters in Tucker County is \$21,418—less than half of the county median of \$49,118.** (ACS, 2019)

Since rentals are usually advertised locally through word of mouth and are filled quickly, little data is available on rental occupancy; however, vacancy of long-term rentals is generally considered to be extremely low.

²This approach uses a baseline model developed to quantify affordable housing demand and supply in Broward County, Florida (Perez, 2020).

Units planned

Several entities already have plans to develop additional workforce-level low-to-moderate income housing in the Thomas-Davis area.

- The Tucker County Development Authority** has allocated space within the Tucker County Industrial Park specifically for future workforce housing. Recognizing lack of housing as one of the biggest impediments to economic development county-wide, the Development Authority partnered with Woodlands Development Group and several other community partners in 2019 to undertake site planning for around 50 rental units and 25 single-family homes, along with commercial space, within the Industrial Park. This housing development is stalled, however, due to the Town of Davis' critical wastewater capacity limitations. The Development Authority has commissioned a wastewater feasibility study, to be released in late 2021, that will identify cross-community solutions for this critical issue. (Leyh, 2021; Tucker County Development Authority, 2021)
- Woodlands Development Group** is currently developing two properties that will include workforce housing: an eight-unit new-construction townhouse in Davis (move-in ready on November 1, 2021) and a 10-unit mixed-use rebuild on Spruce Street in Thomas (currently securing financing). The Davis townhouse project was leased up completely in one day and currently has a waitlist of over 20 applicants, showing the extreme demand for affordable housing.
- Cortland Acres**, a retirement community and rehabilitation center in Thomas, has included workforce housing as part of the vision for planned development established in their master plan. The plan calls for 47 single-family houses and 52 multi-family units.

78% of surveyed Tucker County residents would like to see more single-family homes in the county. 53% would like to see more apartments and/or condominiums.

How many workforce housing units does the area

Industrial Park 75 units in Davis

Woodlands Development Group 8 units in Davis
10 units in Thomas

Cortland Acres 99 units in Thomas

192 planned



In total, there are at least **192 workforce-level housing units** that are planned to be developed in Thomas and Davis in the coming years. But that leaves **129 units still remaining** to meet the area's baseline need—not counting housing that will be needed for the Hyperloop Certification Center.

Housing scenario

Downstream Strategies modeled the economic impacts of a hypothetical 200-unit housing development scenario in Tucker County. Totalling 248,550 square feet of housing, this scenario could include a mix of infill development in Thomas and Davis as well as new development. It would also include a mix of housing types, including:

- 100 market-rate single-family homes; and
- A multi-story mixed-use building with 8,550 square feet of ground floor commercial/retail space and a mix of 100 multi-family units (apartments, condos, and townhouses) in the upper floors.

- Total area: 248,550 square feet
- Estimated cost to build: \$39 million
- 283 jobs required for construction
- \$27.6 million generated as labor income
- Total economic impact of the development: \$69.3 million

Such a development would both address the area's persistent housing shortage and bring tremendous economic gains to the County at the same time, including additional property tax revenue. However, there are several major bottlenecks complicating such a development in Tucker County—chiefly available, developable properties and wastewater capacity—which will be examined in the Built Environment Assessment of this report.

The Next Steps section examines ways and recommendations for developing housing units to meet this critical need.





MARKET ASSESSMENT

BUSINESS ASSESSMENT

As the population grows, the greater Thomas area will require more businesses to support new residents. Within the next five years, this need will be especially strong for construction-related businesses (mainly while the Hyperloop Certification Center is being built) and the tourism sector, which is already experiencing rapid growth.

Businesses in demand

According to visitors...

- 90% are either satisfied or very satisfied with activities/things to do in Tucker County.
- Most are satisfied with existing lodging and restaurant options (68% and 62%, respectively).
- 85% of respondents would like to see more restaurants.
- Additional bars and grocery stores were also cited as highly desirable. (Downstream Strategies, 2021b)

According to residents...

The most frequently cited businesses residents would like to see open were:

- restaurants (40%);
- higher-end grocery options (18%);
- gym/fitness and indoor recreation facilities (14%);
- family and kid-focused businesses (5%);
- retail clothing/shoe stores (5%); and
- health care (hospitals, doctors, eye care, dentists, chiropractic) (5%).

Common themes voiced by surveyed residents included preference for:

- local, non-chain small businesses;
- family-friendly restaurants, as opposed to more bars/breweries;
- ethnic food options;
- lower priced goods and food options for locals; and
- artisan goods, sustainable goods.

Just under half (48%) of respondents do their grocery shopping at the Shop 'n Save in Davis, while 28% drive to Oakland and 14% to Elkins (both thirty minutes by car) for their groceries. (Downstream Strategies, 2021a)

According to downtown business owners in Thomas and Davis...

- 71% would like to see food-oriented businesses (including restaurants, grocery stores, and bars) open nearby. (Downstream Strategies, 2021c)

According to a 2017 survey of Thomas residents conducted by WVU, respondents ranked the following businesses as priorities for tourism development:

- 1) local restaurants,
- 2) festivals/events,
- 3) food/grocery stores,
- 4) unique local shopping,
- 5) accommodations (Eades, 2017).



Projected demand from Hyperloop investment

The construction and eventual operation of the \$500 million Hyperloop Certification Center will have huge ramifications for local businesses.

Economic impact modeling by Downstream Strategies estimates that the Center’s construction will require 1,102 employees on average each year. Roughly half (655) of these workers would be employed in the construction itself, who would likely live in temporary housing or hotel rooms in or near the area, buy food and groceries locally, and shop at businesses in the area.

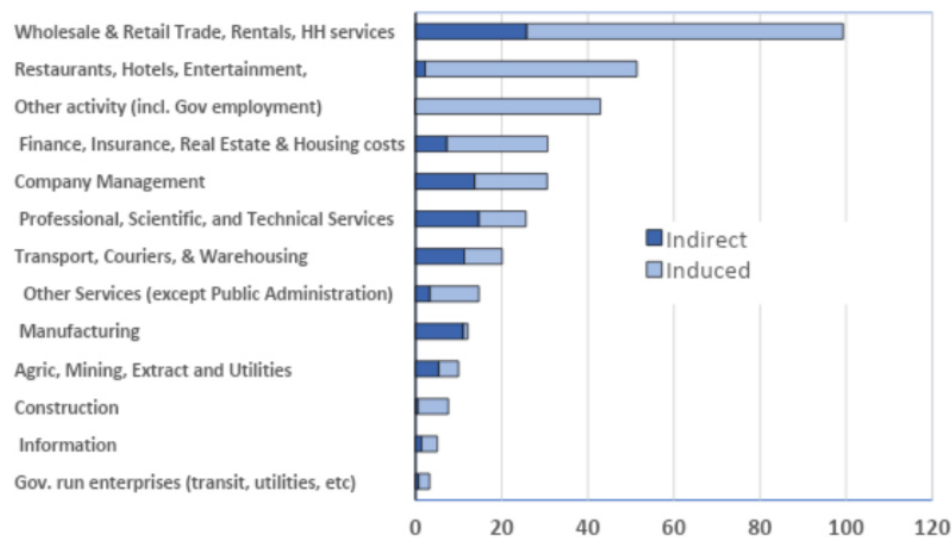
In addition to direct workers, the construction would support 97 indirect employees at companies across the state supporting the construction. This increased economic activity would then likely create an additional

350 “induced” jobs in other sectors statewide. The figure below shows the projected breakdown of the indirect and induced jobs created.

In total, construction of the Hyperloop Certification Center would result in a total state-level economic output of \$835 million and nearly \$493 million of value added to the state’s economy.

While these impacts are projected statewide, much of the economic activity would likely fall within Tucker County—particularly food/ dining, lodging, and entertainment spending for workers on the ground in Tucker County—assuming adequate local businesses exist to meet the need.

Breakdown of indirect and induced jobs by industry



Source: IMPLAN WV Model 2019

Business needs and challenges

Based on feedback from local businesses, employers, and development experts, the biggest issues facing both new and existing businesses in Tucker County are:



Adequate land

Finding available, developable space is a major issue for businesses seeking to open in or move to Tucker County. Many businesses are already interested in locating in Tucker County. The county is viewed as a favorable market location for new businesses, and the Tucker County Development Authority sees routine interest from businesses in the following sectors:

- hospitality and tourism;
- food and beverage (including restaurants, food production, and brewing);
- wood products and related light manufacturing;
- renewable energy;
- manufacturing and warehousing;
- transportation (including gas stations); and
- information technology. (Leyh, 2021)

“There’s a line of companies who want to expand and locate here, but finding suitable shovel-ready sites continues to be a challenge.”

— Steve Leyh, Tucker County Development Authority

While their particular site requirements vary, the most immediate constraints these businesses face is finding land that:

- is for sale;
- has suitable topography for development; and
- has the necessary accessible infrastructure to support the business (including roads, gas, water, sewer, broadband, etc.).

In many cases, the land these businesses seek is simply not available in Tucker County, given the lack of available, developable parcels with acreage (Leyh, 2021).

In addition, the Tucker County Development Authority has identified entrepreneurs and remote workers who currently work from home and are seeking to move into office space as soon as the opportunity presents itself. (Leyh, 2021).

Available workforce

Walking through downtown Thomas or Davis on a summer weekday, it's quickly apparent that very few of the towns' restaurants are open for lunch. As of summer 2021, **more than half of the restaurants** in Thomas and Davis have reduced hours and/or limited operating capacity due to lack of staff. At least two restaurants (including the long-time favorite Hellbender Burritos) have closed due, at least in part, to difficulty finding and retaining quality employees. This shortage of restaurant workers comes at the same time that record numbers of visitors are wanting to eat out but finding limited options and long wait times.

Restaurants are not the only businesses struggling to find workers: Employers from banks to resorts to local nonprofits all have open positions they are struggling to fill.

In a 2021 Downstream Strategies survey of businesses in Thomas and Davis, **finding**

employees was almost unanimously cited as both the **number one issue facing existing businesses** and the **single biggest obstacle businesses currently face** (Downstream Strategies, 2021c).

The building trades are in especially short supply in the greater Thomas area. "When it comes to doing capital improvements," said one local employer, "it's hard to find qualified contractors interested in working. They have all the business they need."

Home builders are in short supply, and many have wait times of three or four years before they can start a new project. Many residents needing basic repairs have to hire contractors from neighboring counties. According to one business owner, "We desperately need more electricians, contractors, and plumbers. We have very limited numbers of those in the area, even though there is so much demand."

Quotes from local employers:

"I'm on several boards of local organizations, and they all need staff."

"Everyone is hiring and needs quality employees."

"Everyone I know is hiring right now."

"The ice cream shop was advertising \$20 per hour for a manager and still couldn't get anybody."

"Our issue with employees [in the county] is directly tied to the salaries offered and the lack of housing."

Canaan Valley Resort State Park, which employs hundreds of people year-round, is among the businesses struggling to hire adequately skilled staff. According to the resort's General Manager Sam England, "I need staff across the board. And I'm willing to train!" (England, 2021) The resort is short on housekeepers, frontline employees, security guards, wait staff, as well as key summer and winter recreation positions.

A shortage of lifeguards meant that the resort had to close the pool on several peak summer days in 2021. The resort's skeet

shooting range was closed all 2021, due to the lack of employees. "You'd think in this area where everyone loves to hunt we'd be able to find someone who'd like to work the skeet range," said England. (England, 2021)

This shortage of workers forced resort managers to bring in employees from a sister property in another state in the winter of 2020-21. The resort's leadership is currently looking into visa programs and other options for bringing in employees from other places.

Affordable housing

As detailed in the Housing Assessment, the critical shortage of affordable housing in eastern Tucker County is inherently tied to the area's workforce issues.

There are exceedingly few options for homes under \$220,000 in this part of the county, which is the maximum price a family earning the area median income of \$58,400 can afford. This means that many people working essential jobs in the area—including in education, health care, service industry, and more—cannot afford to live in Thomas, Davis, or the surrounding area. Given the rough terrain and harsh winters in the area, commuting can be difficult and impractical for many families.

Quotes from local employers:

“It’s pretty difficult to get somebody to move here to work, when they can’t afford to live here.”

“You can’t buy an acre and build a house here for less than \$300,000. And that’s assuming you could find an acre to buy, which you can’t right now!”

“We’re trying to figure out where and how to market our open positions to folks outside the county. But then we have the issue of, if we hire them, where are they going to live?”

Adequate infrastructure

Water and wastewater are *major* limiting factors in housing, business, and overall economic development. The Town of Davis faces severe wastewater capacity issues that, until addressed, seriously limit any future development in and around Davis. Both municipalities are taking steps to address these issues, outlined on page 59.

Roads and parking are becoming increasingly strained as the volume of traffic and flow of visitors has spiked since 2020. Surveyed business owners cited lack of parking as the second-most-cited issue facing their customers, employees, and overall business (Downstream Strategies, 2021c). Both Thomas and Davis have limited parking and rapidly increasing traffic through their downtowns. In particular, Route 48 is routed one-way along Front Street through Thomas, which creates traffic congestion and safety issues through this popular pedestrian zone.

Cell and internet coverage were the third most frequently cited issues facing existing local businesses (Downstream Strategies, 2021c). Nearly 72% of visitors have issues with cellular phone service in Tucker County and 50% with Internet access (Downstream Strategies, 2021b).

Key business sectors

Food and dining

Surveying by Downstream Strategies in 2021 found clear consensus that visitors, residents, and businesses would like to see increased food, dining, and grocery options in Thomas and the surrounding area. Yet while restaurant demand is rising in pace with the growing tourism industry, workforce shortages are severely straining the area's existing restaurants.

According to economic modeling from Downstream Strategies, the influx of visitors and growing demand could support as many as **11 additional restaurants with 102 employees**, assuming that tourism growth continues as expected.³

On top of that, once construction commences on the Hyperloop Certification Center, the project's 655 workers will fuel demand for at least **seven additional restaurants**, which will need an estimated **66 additional employees**.

While this presents a significant opportunity for restaurant-sector business expansion and sales, it also highlights a major gap between the area's current restaurant capacity (based on the limited availability of service industry workers) and what will be needed to serve future diners. In addition, many other key business sectors are likely to see similar spikes in demand as the population increases.

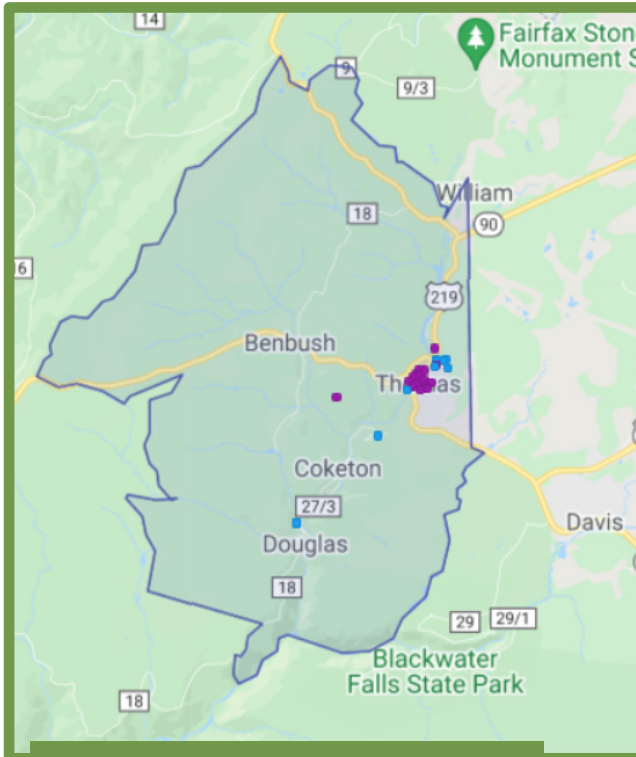
A common theme among surveyed residents and long-time visitors to the area was the appreciation of small, local restaurants in Thomas and Davis and the desire to maintain the area's unique character as it grows. The pressure for development and projected need for significantly increased business capacity underscores the need for planning to manage this expected growth in a way that best serves the community.



³This analysis is based on a projected 38% increase in tourism and assumes that area restaurants in 2020 and 2021 are operating at 75% of their potential capacity.

Short-term rentals

Short-term rentals are a profitable and rapidly growing sector nationwide, and Tucker County is no exception. Many people in Thomas, Davis, and Canaan Valley now earn their primary or supplemental income from short-term rentals.



THOMAS

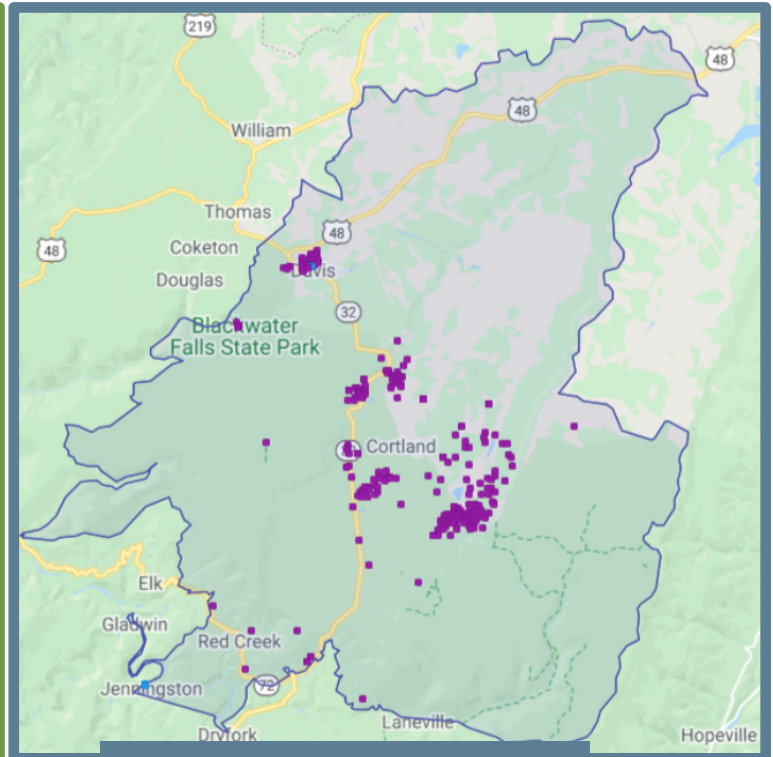
29 active listings

82% occupancy rate

- 55% whole home (16)
 - \$146/night
 - \$3,057 median monthly revenue per listing
 - \$681,925 average annual revenue**
- 45% private room (13)
 - \$82/night
 - \$1,082 median monthly revenue per listing
 - \$554,064 average annual revenue**

\$1,235,989 total annual revenue
X 6% hotel tax =

\$74,159 hotel/motel occupancy tax revenue (6%)



DAVIS/CANAAN

330 active listings

67% occupancy rate

- 98% whole home (323)
 - \$259/night
 - \$3,433 median monthly revenue per listing
 - \$13,783,411 average annual revenue
- 2% private room (7)
 - \$129/night
 - \$1,344 median monthly revenue per listing
 - \$281,294 average annual revenue**

\$14,064,706 total annual revenue
X 6% hotel tax =

\$843,882 hotel/motel occupancy tax revenue (6%)

Since 2020 the area's limited housing stock is being converted into short-term rentals at an alarming rate. As shown in the Housing Assessment, local realtors report that the housing market surge is being driven predominantly by non-local second-home shoppers, the majority of whom are seeking a property with potential to generate income as a short-term rental while not in use. This trend is reducing the already severely limited housing stock and worsening the area's housing crisis. In response to this issue, as of August 2021 the Town of Davis has issued a temporary moratorium on new short-term rental businesses through January 1, 2022.

In addition, local authorities believe that many short-term rental operators may not be operating with a proper business license and/or remitting the required Hotel/Motel Occupancy Tax. With the passage of Senate Bill 270 (known as the "Airbnb Bill"), remote marketplace facilitators (including entities such as Airbnb and VRBO) with more than \$100,000 in gross revenue from West Virginia sales or 200 or more transactions in the state per year must collect and remit Hotel/Motel Occupancy Tax (WVHTA, 2021).

Based on available short-term rental performance data, the 29 active listings within the 26292 zip code (which encompasses the City of Thomas) are currently generating around \$1.2 million in revenue per year. With 330 active listings, the annual short-term rental revenue for the 26260 zip code (which includes Davis and the greater Canaan Valley area) is likely over \$14 million per year.

As a result, the passage of the Airbnb Bill will result in nearly \$1 million per year of additional Hotel/Motel Occupancy Tax revenue for the eastern half of Tucker County.

Photo: Nick Frazee





BUILT ENVIRONMENT ASSESSMENT

BUILT ENVIRONMENT AND CRITICAL INFRASTRUCTURE: THOMAS AND TUCKER COUNTY

The term “built environment” captures all of the man-made or modified structures that provide people with living, working, and recreational spaces: homes, buildings, streets, open spaces, and infrastructure (EPA, 2021). These infrastructure categories are deeply interconnected, and they represent the foundational building blocks of the community.

The City of Thomas has significant resources in its built environment already in place, which makes infill development the most strategic path forward. However, as shown below, they also have key areas needing update and investment in order to meet the needs of current and future residents, businesses, and visitors alike.

UTILITIES

The City of Thomas maintains its own water and wastewater systems. While Thomas has more wastewater capacity than the neighboring Town of Davis, its wastewater system needs significant upgrades in order to regain compliance and accommodate future growth. The City also needs a new water treatment plant and distribution lines.

OPEN SPACE

Thomas residents and visitors enjoy access to trails at the Thomas City Park, located across the river from downtown. City partners have also prioritized an adjacent 28-acre City-owned property for redevelopment as a riverfront park, which has been a central focus of the City’s EPA Brownfields funding. Local partners are now seeking matching funds for a West Virginia Department of Highways Transportation Alternatives grant for a pedestrian bridge that would link these two public green spaces to downtown Thomas.



HOUSING

While Thomas is an extremely desirable area for housing, it experiences very little housing turnover. The housing stock tends to be older, and homes that become available generally need significant renovation.

BUILDINGS

Thomas' iconic downtown has undergone significant revitalization in the last two decades. Today the storefront spaces on Front Street are now nearly 100% occupied.

Tremendous progress has been made, though some buildings still require significant renovation and reinvestment.

ROADS AND TRANSPORTATION

Route 48 follows Front Street and Spruce Street through downtown Thomas. This brings significant traffic through these two one-way mainstreets which see heavy pedestrian use and on-street parking.

Surveyed business owners cited parking as the second-most commonly cited obstacle facing their business in 2021.

Infill development

Given the lack of available, developable land and the cost and difficulty extending utilities to outlying areas, **infill development offers the most cost-effective, sustainable, and overall beneficial path forward for Tucker County.**

Infill development is defined as “the process of developing vacant or under-used parcels within existing urban areas that are already largely developed” (MRSC, 2021). In the case of Tucker County, this means concentrating development in and around the County’s five municipalities and other core communities. Given the tremendous pressure for development in the eastern half of the county, infill development will be especially critical and beneficial for Thomas and Davis.

This makes economic sense for several key reasons:

- As municipalities, the City of Thomas and Town of Davis have existing infrastructure and services in place. As highlighted above, it is more efficient to use existing infrastructure than it is to extend infrastructure across rugged terrain to outlying areas.
- From a market perspective, Thomas and Davis are now sought-after destinations with tremendous appeal. As shown in the Housing and Business sections of this report, demand is high for additional housing and commercial space in these two towns.
- Finally, infill development will help the City of Thomas and Town of Davis increase their population densities, which will in turn help rebuild the tax base needed to sustain community infrastructure and amenities. (National League of Cities, 2021)

Infill development can reduce development pressure on outlying areas, helping to protect lands that serve important ecological functions. When it occurs near existing transit infrastructure, employment centers, and other destinations, it can also help reduce the amount that people drive, improving air quality and reducing greenhouse gas emissions. The redevelopment of formerly economically viable but now under-used or abandoned sites, and those potentially contaminated with hazardous waste, is especially important. Such projects can improve the environment while providing multiple community benefits.

Brownfields redevelopment in Thomas

Since 2014, Downstream Strategies has worked with the City of Thomas in crafting and implementing its brownfields redevelopment strategy. Downstream Strategies staff worked with City and County officials, economic development professionals, community-based organizations, and the Northern West Virginia Brownfields Assistance Center to identify and prioritize properties for assessment. They then partnered with Green Rivers to complete six Phase I Environmental Site Assessments (ESAs).

Community leaders prioritized a 28-acre property located just across the North Fork of the Blackwater River from downtown Thomas for redevelopment. The parcel's proximity to downtown made it a prime location for a public greenspace with recreational trails and other park amenities. After a Phase I ESA was completed prior to the start of the 2014 Brownfields grant, Downstream Strategies completed a Phase II ESA

for the property, which enabled the City to secure an additional EPA Brownfields Cleanup Grant in 2016 to remediate the Riverfront Park property and address the site's eight acres of mine-scarred land through the West Virginia Department of Environmental Protection's Voluntary Remediation Program. Construction for this project will be completed in 2022.

The City of Thomas received a second EPA Brownfields Assessment Grant in 2017 to continue the redevelopment activities. As part of this grant, a Phase I ESA was completed on Cottrill's Opera House. Asbestos and lead-based paint inspections have been completed on Cottrill's Opera House, the Engineering Building, and the Thomas Community Center. The majority of this grant has focused on redevelopment planning.

Assessed properties included:

- 172 Spruce Street (Carole Phillips Building)
- 180 Spruce Street (Ben Nelson Building)
- Anthony Lambruno Property
- Engineering Building
- Lot 115 Spruce Street (Milkint Garage)
- Tap Room (Check Taylor Property)

Brownfields success

The majority of the properties assessed through the City of Thomas' FY17 Brownfields Assessment Grant project are on their way towards redevelopment. Downstream Strategies conducted Phase I Environmental Site Assessment (ESA) for each of the following properties. Follow-up redevelopment activities are outlined below.

Third & Buxton Streets: This property sold after its assessment was completed. The building was demolished, and the lot is now greenspace that is ready to be developed.

242 Spruce Street: The building has been demolished and is shovel-ready for a 10,000-square-foot mixed use building, with street-level commercial space and two upper levels of workforce housing.

172 Spruce Street: Known as the Cholpana Building, the owners are conducting a high-quality renovation, of three floors of market-rate rental units and street-level commercial space.

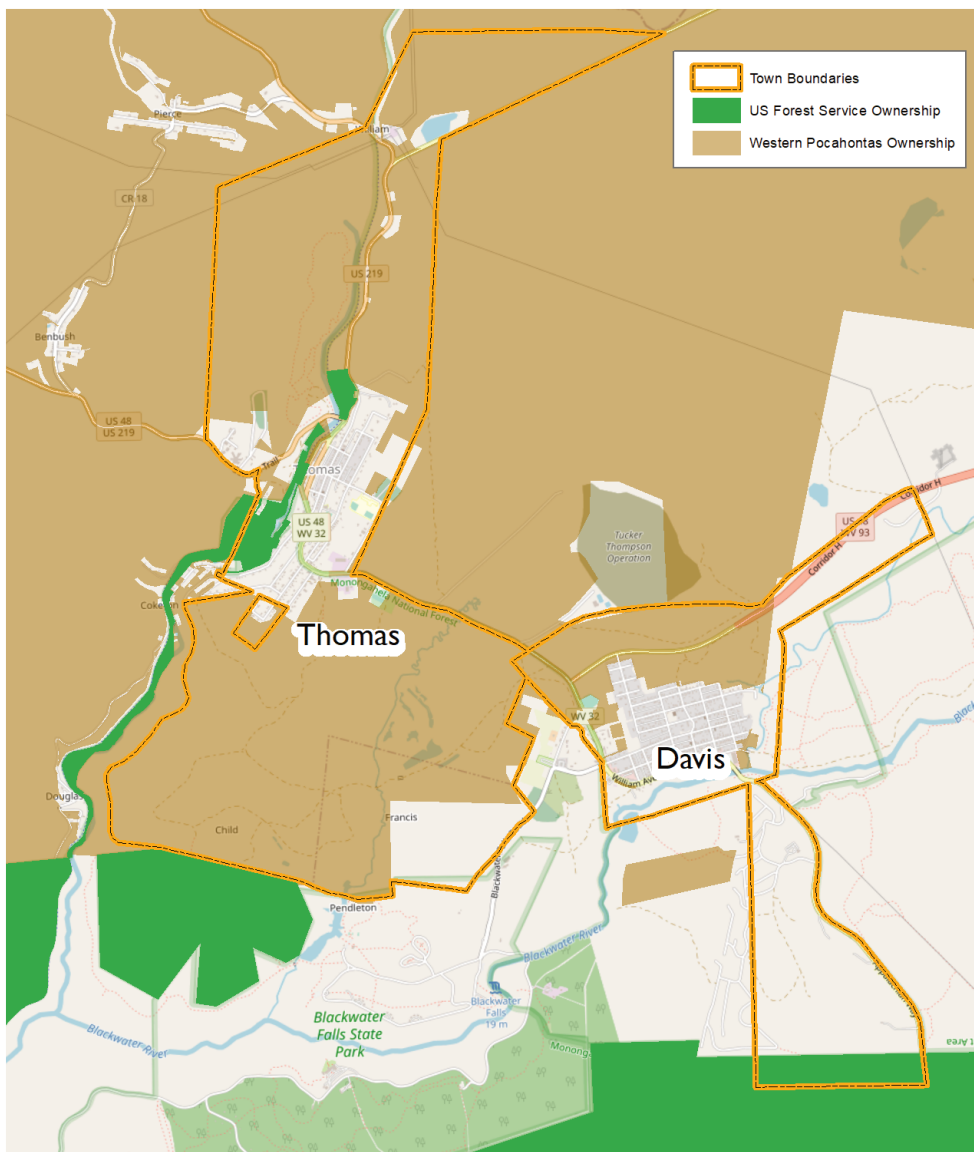


Infill potential: City of Thomas

Like much of the county, the City of Thomas is geographically confined. The U.S. Forest Service and Western Pocahontas Properties, a large landholding and natural resources company, own the vast majority of land immediately surrounding the city. Given its limited ability to grow outward, infill development represents a key avenue for the City of Thomas to meet current needs and accommodate future growth.

The City of Thomas represents a small geographic footprint that is already largely built out.

For many years, vacant buildings were the norm in downtown Thomas, and cheap real estate was a major factor that helped fuel its early revitalization. As Thomas has gained notoriety as a hip and up-and-coming destination, its real estate has grown increasingly attractive in recent years. Many properties identified as suitable for redevelopment through the City of Thomas' EPA Brownfields work have since been sold and redeveloped privately; likewise, many properties that were identified in the 2012 and 2017 BAD Buildings surveys have been improved.



Large Landowners In Thomas & Davis

0 0.25 0.5 1 Miles

This marks a very positive new trend for the City. However, the city's very small size and booming real estate market mean that today there are exceedingly few properties currently available for sale or rent. This presents a challenge because, as shown throughout this report, the demand for housing and businesses in Thomas and the surrounding area exceeds the current availability of space and properties.

So where can development occur within the City of Thomas?

To answer this question, Downstream Strategies performed geospatial analysis to:

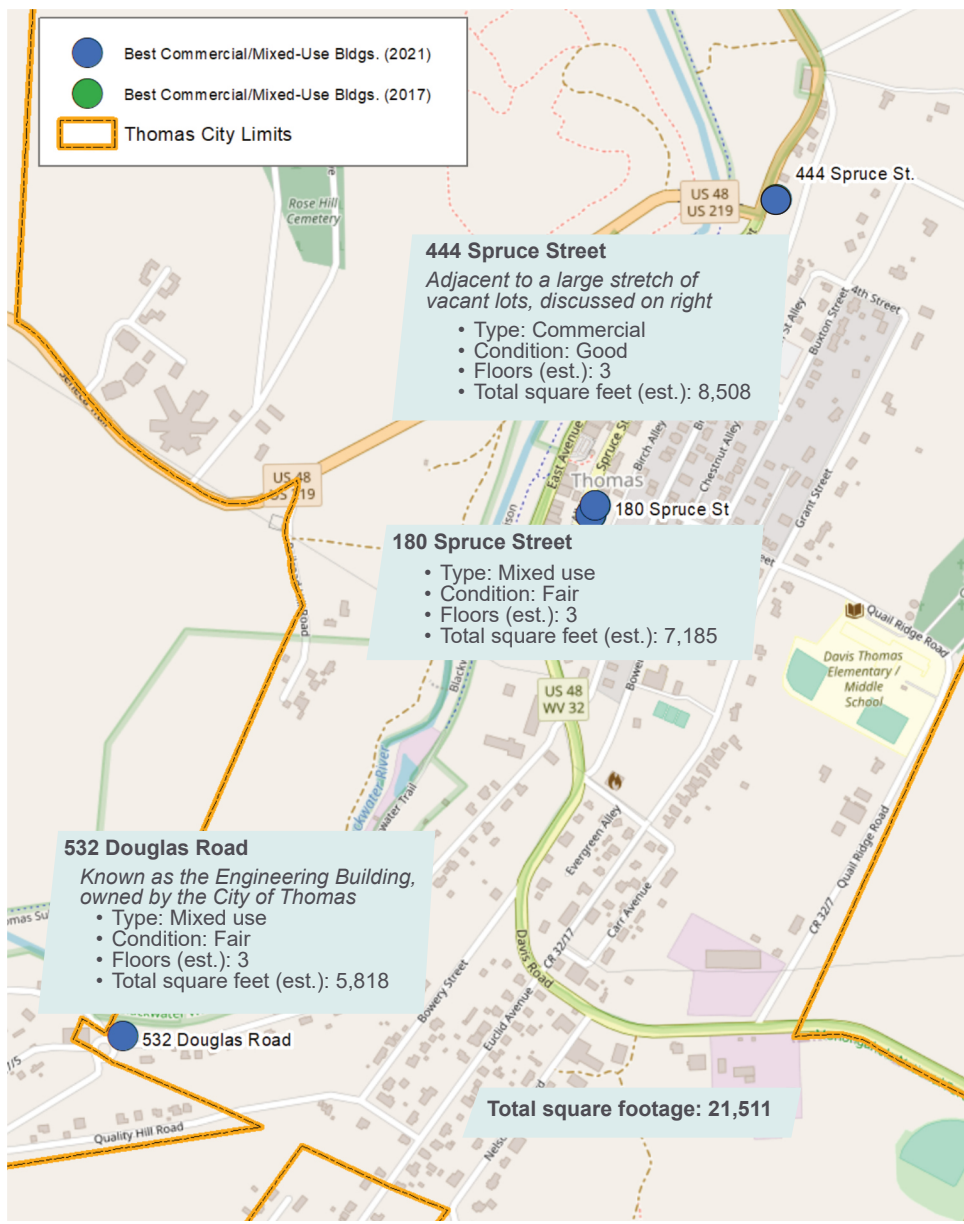
- identify parcels and properties within Thomas' city limits that are blighted, abandoned, dilapidated, and/or unbuilt; and
- assess which of those properties would have strong potential for development.

BAD Buildings Program

The Blighted, Abandoned, and Dilapidated (BAD) Buildings Program is a West Virginia statewide initiative that provides technical assistance and site analysis tools to enhance abandoned and dilapidated building programs in West Virginia communities. The program’s model includes a survey process by which community volunteers conduct walking or driving surveys of blighted, abandoned, and/or dilapidated buildings within the community in order to develop an inventory of properties in need of assistance. Such surveys were conducted by community members in the City of Thomas in 2012 and 2017 and in Davis in 2017. Downstream Strategies staff updated the Thomas survey in 2021 as part of this study.

Existing buildings

Of commercial and mixed use properties reassessed from the former survey in the City of Thomas, the following candidates emerged as prime for redevelopment.



Other than the Douglas Road site, these buildings are within or very near to the central downtown district of Thomas. These buildings are all favorable for redevelopment projects due to their location near the business hub of the city and their overall style and appearance, which, due to their vintage, matches the character of Thomas. The mixed-use buildings offer an opportunity to kill two birds with one stone: Each building has the potential for housing on the upper floors as well as commercial development at street level.

These buildings all date to the early 20th Century with the newest (180 Spruce Street) having been constructed in 1920. Total assessed values (as of 2020) range from \$72,000 to \$113,300.

In total, these buildings together represent the potential for **three to five commercial/small business spaces and approximately eight residential units.**

Unbuilt lots

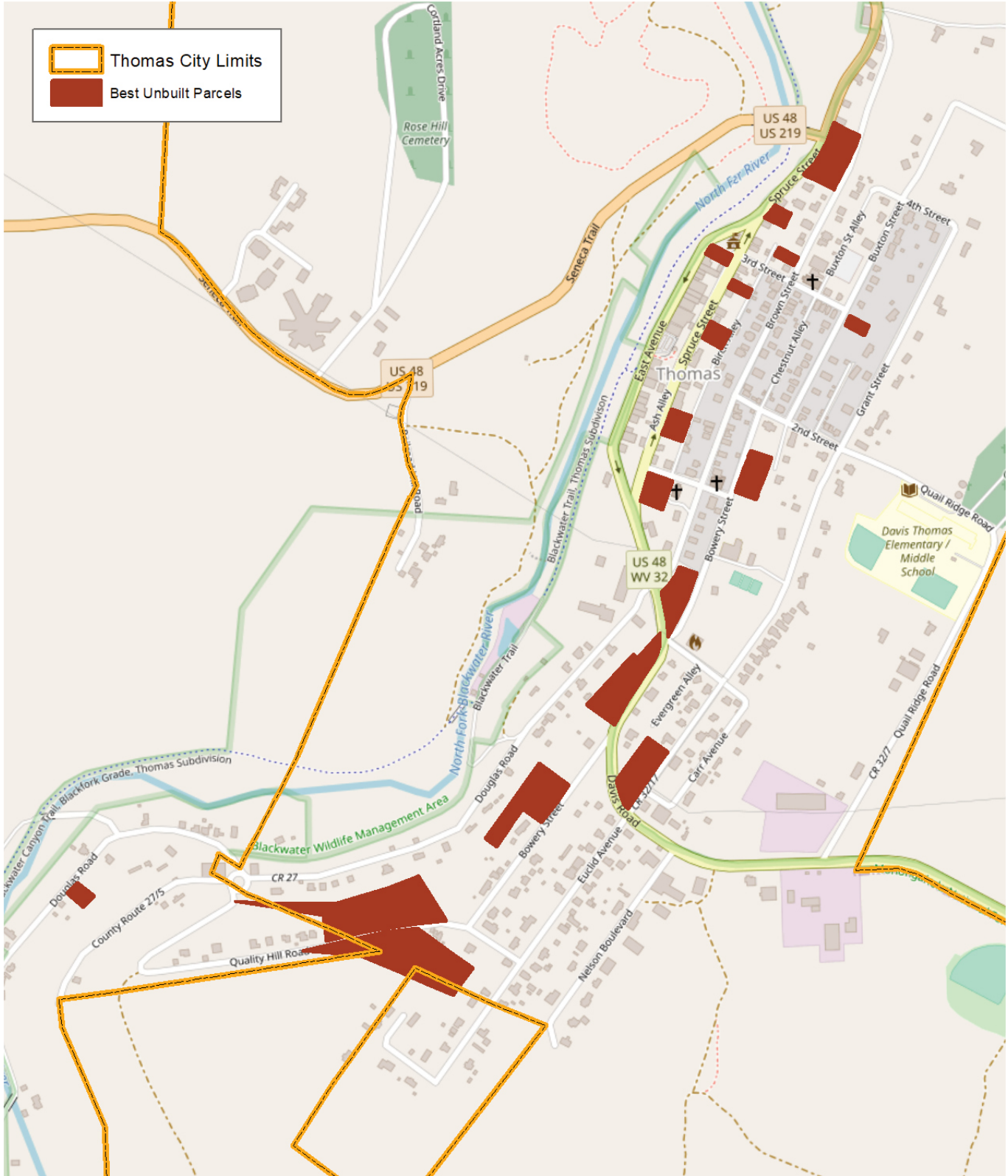
These properties are well distributed around Thomas, including several in the downtown business district, and several that are adjacent to buildings identified in the previous section. Together, these represent roughly 14 acres of buildable property. Apart from 344 Spruce Street, Ash Alley, and 19 N. Euclid Avenue, each of which houses buildings and/or foundations in need of demolition, these properties are entirely unbuilt.

Seven of these sites (encompassing 18 parcels) are within the downtown district of Thomas and would be suitable for mixed-use development. Two additional sites (two parcels) have frontage on US 32/East Avenue

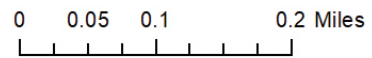
and would be suitable for either commercial or residential development. The remaining nine sites are within residential areas of Thomas and thus best suited for residential development. Given the size of most of these parcels, the most likely style of residential in most cases is a single-family home. The Bunker Hill Road area is an exception, as it is quite large.

A few of these properties have been the focus of previous Brownfields-funded projects. Those are highlighted in the map on the following page.





Best Unbuilt Parcels (Thomas)



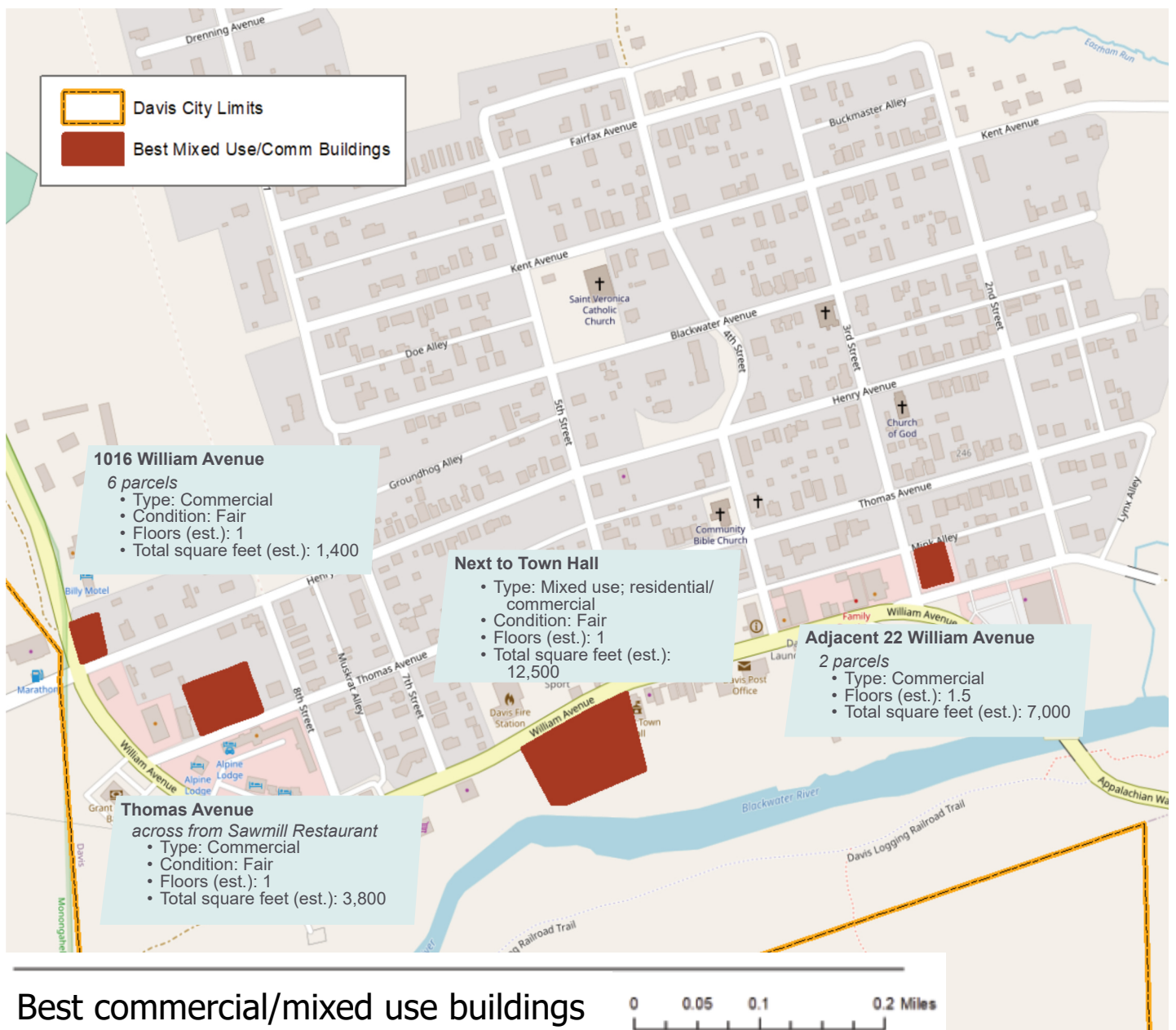
Infill potential: Town of Davis

The magnitude of the need for housing in Tucker County necessitates looking outside of Thomas for more opportunities. Located just three miles away, the neighboring Town of Davis should also be prioritized for infill development.

Existing buildings

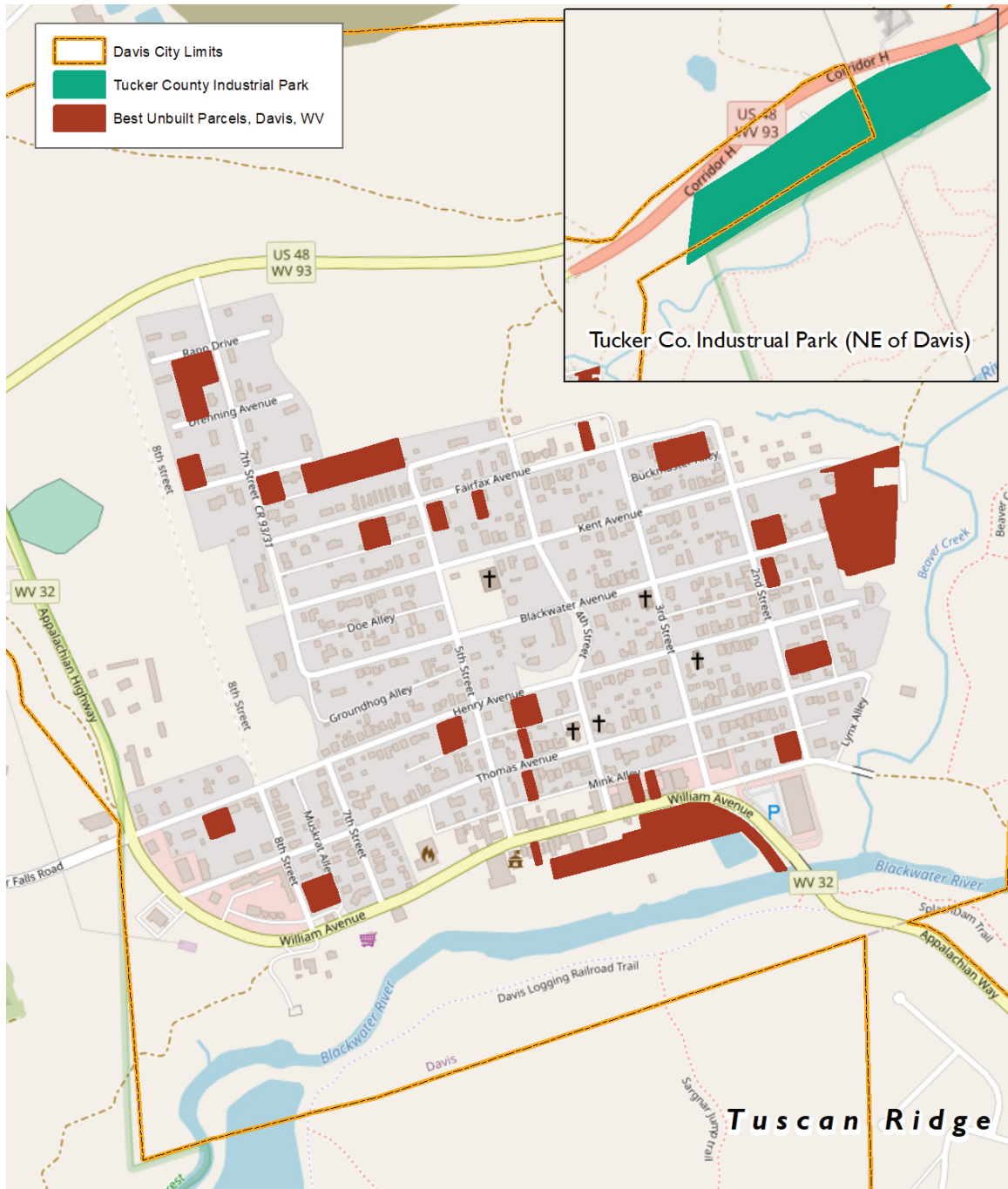
Downstream Strategies identified four commercial buildings within the City of Davis that are candidates for redevelopment. One of those buildings next to City Hall is already being actively redeveloped into a mixed-use residential and/or commercial space. The building adjacent to 22 Williams Avenue also lies within the main commercial district of Davis.

Less information was available about two of the buildings in the west part of town: 1016 Williams Avenue (a very small commercial space that shares a lot with a single level residential structure) and Thomas Ave across from the Sawmill Restaurant. The current use/status of these buildings is uncertain.



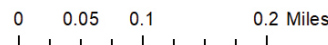
Unbuilt lots

Like Thomas, Davis' downtown is almost entirely built out, but some unbuilt lots exist. Those lots within the main part of the town likely represent the most tangible possibilities for development projects and include approximately 16 total acres spread over 52 parcels. (This includes Beaver Creek Village, which has not been fully sub-divided). The majority of lots within Davis are within residential areas, although six locations lie within or very near the main commercial district of Davis.

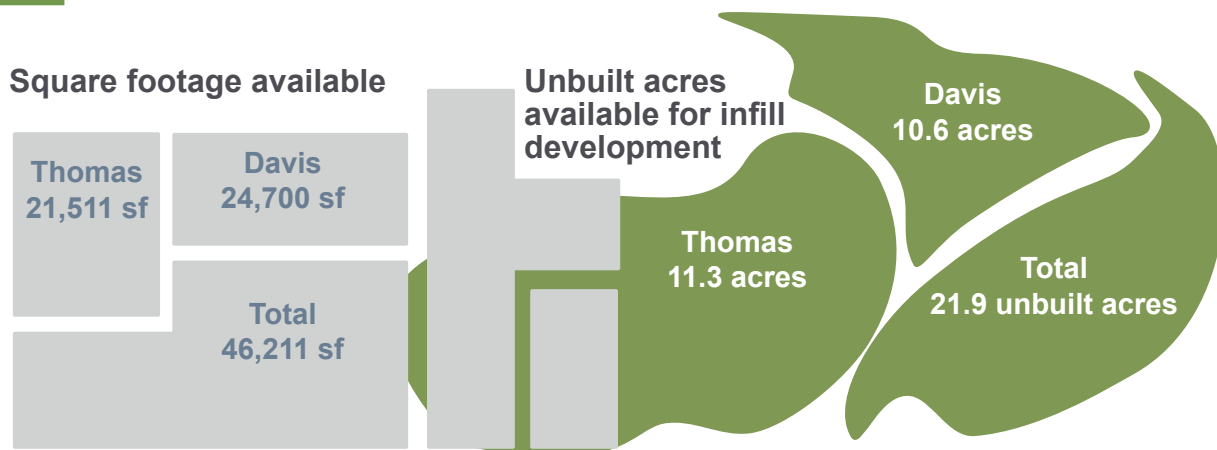


All told, there are five unbuilt commercial lots, three of which are within the main part of the downtown business district. Three of these lots are approximately the same size (130' x 40'), with the last, the former site of the Highlander Hotel, being much larger. This site has a great deal of development potential. The buildable area is large, and the parcel borders a city-owned riverfront park. This site would be well suited to higher-density residential development and/or mixed-use development.

Best Unbuilt Lots



Key takeaways



As presented in the Market Assessment of this report...

The greater Thomas area needs a minimum of **129 new units of workforce housing** (beyond those currently planned), plus several hundred additional units to accommodate Virgin Hyperloop's planned developments.

A **200-unit development** like the hypothetical one presented on page 31 would require **248,550 square feet**.

Experts agree that commercial and retail space for businesses in Thomas and Davis is in **short supply and high demand**.

The available 46,211 square feet of existing space and 22 unbuild acres within Thomas and Davis could—and should—be utilized to help meet this need. However, the need for developable space greatly exceeds the current availability within existing buildings and unbuild lots.

So where else could further development be steered?

Tucker County Industrial Park

The Tucker County Development Authority owns property within Davis town limits slated to be developed as the Tucker County Industrial Park. The property has frontage to Corridor H and lies within walking distance to downtown Davis. The property is envisioned as a small-scale multi-use development: Less than 80 of the property's 165 total acres are suitable for development, and lot sizes are under 10 acres. As of 2021 the park has one existing manufacturing tenant, Pro Poly of America. As mentioned in the Market Assessment, the Development Authority has

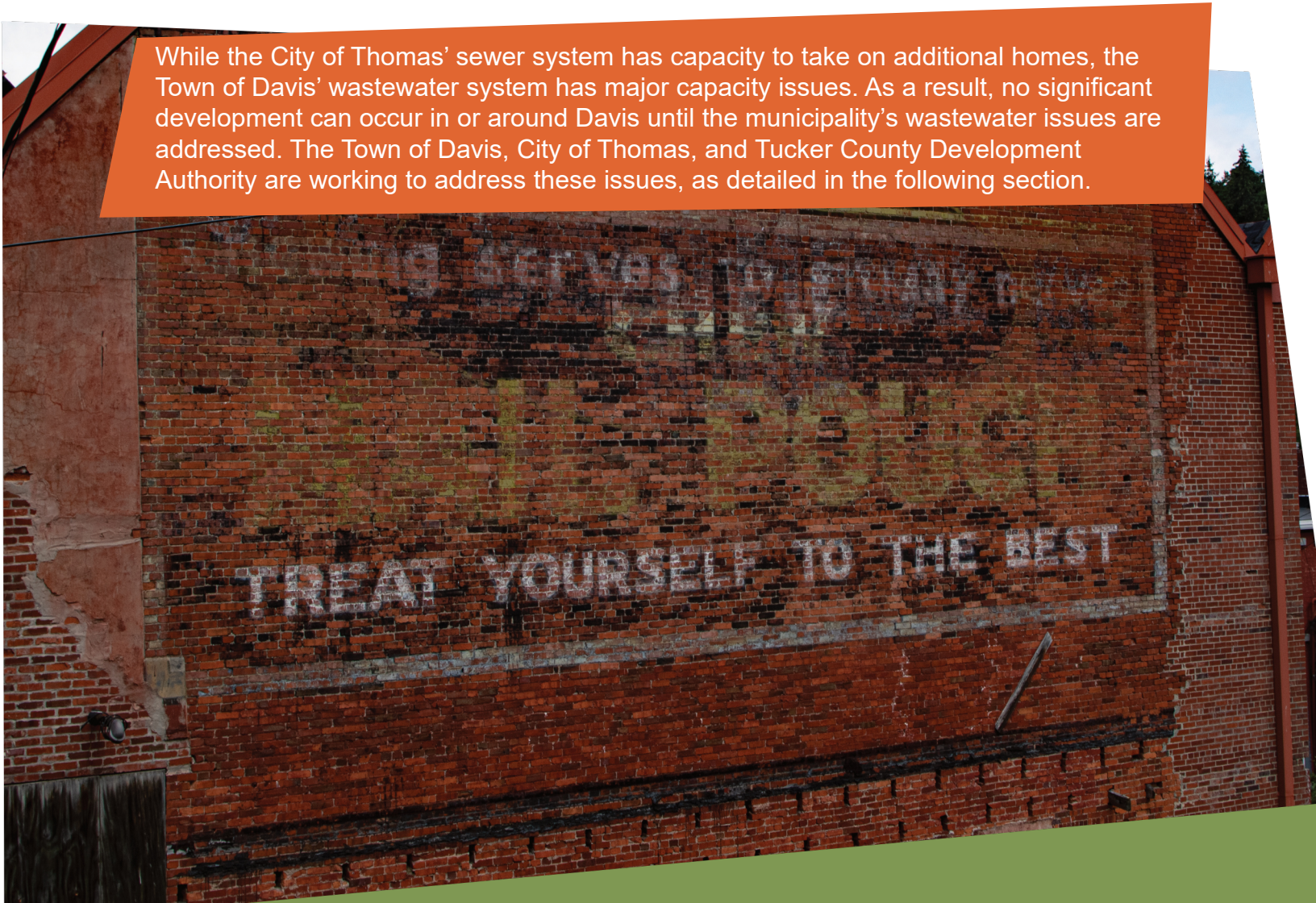
allocated a portion of this property's developable space for workforce housing in order to combat the area's critical housing shortage. The full development of the property is currently hampered by the Town of Davis' wastewater issues. However, efforts are underway to address these issues. (Leyh, 2021; Tucker County Development Authority, 2021). Initial design work is complete, with preliminary engineering assessments and environmental assessments seen as next steps.

Tuscan Ridge

Tuscan Ridge is an up-and-coming housing development within Davis town limits. While only a handful of homes have been built as of 2021, the development offers around 210 total lots. Utilities have been extended to around 90 of those lots, which are ready to be built upon

as of mid-2021. Building an additional lift station would open an additional 50 lots for development. However, development of additional homes in Tuscan Ridge is currently on hold due to the Town of Davis' wastewater capacity limitations. (Barb, 2021)

While the City of Thomas' sewer system has capacity to take on additional homes, the Town of Davis' wastewater system has major capacity issues. As a result, no significant development can occur in or around Davis until the municipality's wastewater issues are addressed. The Town of Davis, City of Thomas, and Tucker County Development Authority are working to address these issues, as detailed in the following section.



NEXT STEPS

THE PATH TO EQUITABLE DEVELOP-

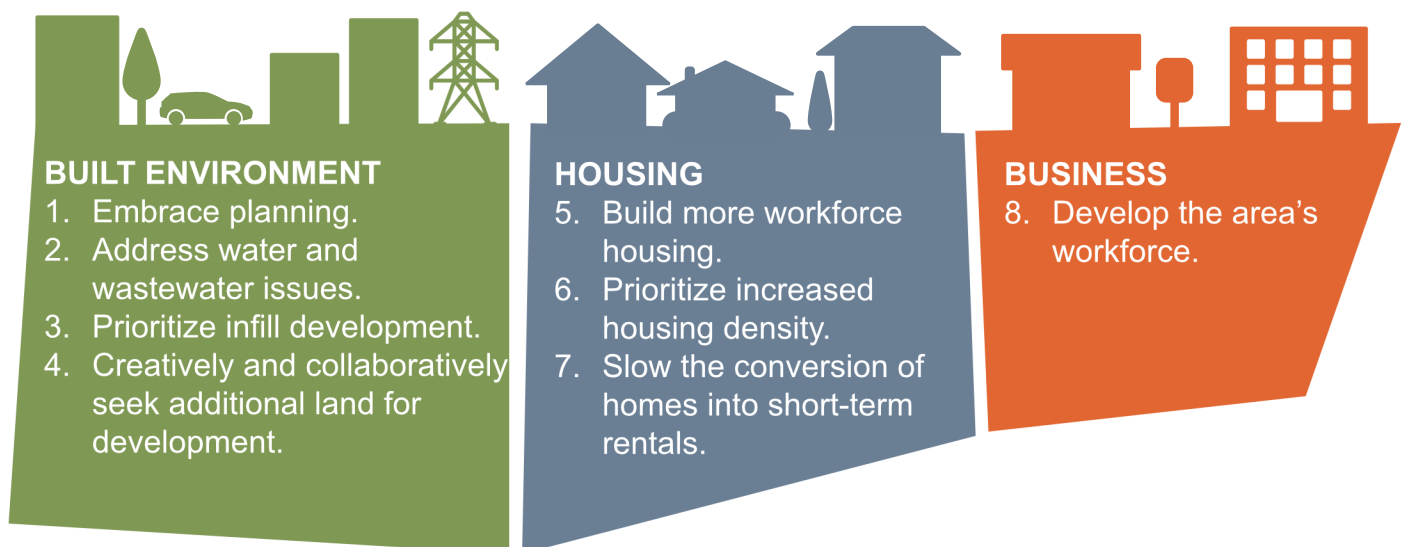
As shown throughout this report, there is tremendous opportunity on the horizon for Tucker County to grow both its economy and population. While this growth could benefit the County and its municipalities, it also raises fundamental, undeniable issues.

- **From an infrastructure perspective**, the existing infrastructure—from housing and wastewater to roads and telecommunications—is already strained and cannot accommodate more visitors and people without significant investment and improvement.
- **From a social perspective**, residents and long-time visitors voice mixed feelings on growth and development. Based on recent surveys, local leaders and residents alike want to see more well-paying jobs and a stronger, diversified economy in Tucker County. Yet there is also a real reluctance to see change come to this tucked-away corner of West Virginia. (Downstream Strategies, 2021a-c; Eades, 2017)

Yet changes are already unfolding throughout the county, driven by major shifts in tourism, the housing market, and business dynamics, and even bigger changes are expected in the coming years.

As a result, the question now is ***how to manage growth—and accommodate more visitors and more residents***—in a way that maintains community character, preserves the area’s natural treasures, increases quality of life for residents, and maximizes economic benefit.

The recommended next steps provided below offer a rough road map to help the City of Thomas and its partners navigate development in the greater Thomas area.



Address planning and capacity limitations

While Tucker County and its municipalities engage in basic community and regional planning, there is neither a clear, cohesive vision for growth or development in the area, nor a concrete plan for how that growth and development will be managed.

Based on surveys and conversations with residents in 2021, it was clear that community members have strong yet varied feelings about development. Many voiced opposition to any growth, though most could be categorized as skeptical and reluctant to see change come to the well-loved region.

An overwhelming takeaway, however, was that respondents care deeply about preserving the character that makes the area so special. Despite this deep attachment to honoring and preserving the area, there is not widespread support for the few coordinated efforts to ensure that the looming growth and development will be managed.

Planning and coordination across municipalities and agencies can help ensure that growth occurs in a way that residents and businesses actually want, while avoiding the adverse effects they don't want. Effective planning places control in the hands of the community and helps prioritize local interests above outsider interests.

For example, community members voiced

strong opposition to fast-food restaurants, chain hotels, and big box stores locating in the area (Downstream Strategies, 2021a). Yet the construction (and eventual operation) of the Hyperloop Certification Center is going to fuel significant demand for food, lodging, and services that far exceeds Tucker County's current capacity. Without advanced planning now, the community runs the risk of seeing chains and franchises jump in to fill the market need—which is exactly what most residents do not want to see happen.

As a result, decisions made in Thomas and Tucker County now may have a pivotal impact on how coming development unfolds within the area. In particular, community planning is urgently needed to determine:

- the best overall locations to steer development;
- appropriate rural land use regulations that preserve and protect the character and environmental sensitivity of the area, while avoiding over-regulation;
- critical infrastructure investments needed to serve an increased population; and
- essential businesses that must be recruited to meet the needs of future residents, visitors, and industries.

Ideas from residents on how to make Tucker County an even better place to live...

“No Walmart. No McDonalds. No Days Inn.”

“Zoning.

“I feel incredibly lucky to live and love here.”

“Code enforcement officers are needed to remedy the safety and health concerns of several properties in Thomas/Davis.”

“Keep [the area] the way it is.”

“Places to work.”

“Some sort of zoning ordinance to make sure future development is done right.”

“Affordable housing, reducing Airbnbs.”

“No fast food or big box stores.”

“Keep the population small.”

“More unity in maintaining and improving our towns.”

Long-range planning at the county level falls within the domain of the Tucker County Planning Commission, which provides the Tucker County Commissioners with advice and guidance on planning issues within the county. Similarly, Davis and Thomas have each created municipal Planning Commissions in recent years to serve the same function for their incorporated jurisdictions.

Several years ago, the Tucker County Planning Commission proposed a county-wide Subdivision and Land Development Ordinance (SALDO). The draft ordinance was met with an emphatic disapproval from a large portion of community members who attended public meetings and failed to gain the support of a majority of the County Commissioners..

In 2020, the Planning Commission received permission from County Commissioners to rewrite the ordinance in response to former input. As of 2021, the current draft SALDO continues to receive mixed support from the community and continues to be altered. The Planning Commission continues to recommend the adoption of the SALDO to prepare for probable large-scale development.

The Davis and Thomas Planning Commissions are both actively completing draft Comprehensive Plans for their respective municipalities with hopes of adoption by early 2022.. Both Planning Commissions have expressed interest in adopting municipal SALDOs, nuisance ordinances, and other means of managing expected growth once plans are approved.

The Tucker County Planning Commission is also encouraging the County Commission to hire a professional, certified planner with competitive pay and benefits for the county to provide leadership and enforcement ability for land use issues and future regulations. The existing part-time position has been vacant for two years and does not provide the salary necessary to hire a qualified candidate.

In exploring other ways to increase the county's capacity, Tucker County could look to Fayette County, West Virginia, which has found an innovative and effective way to address local planning and capacity issues. The Fayette County Commission created the Fayette County Resource Coordinator's Office in 2015 to serve as a county-wide economic and community development department. Its staff facilitate community engagement, economic opportunity, and effective government by initiating and managing projects in collaboration with local businesses, organizations, elected officials, and agencies (including the Fayette County Planning Commission). This office's four employees bring valued expertise in grant writing, facilitation, and project development which has significantly increased the County's capacity. Funded by general revenue, the Office costs the County around \$100,000 per year and has generated an average of \$220,000 per year in grant funding for local projects. (Fayette County, 2021; Peña, 2021)

Plan for tourism growth

When it comes to development, tourism-related growth is an area in which local residents have strong opinions. Tourism is a dominant, fast-growing sector within the local and regional economy, and it is largely responsible for the downtown revitalization that has occurred in Thomas and Davis over the last two decades. Yet many in the community view tourism negatively, believing that it is fueling negative impacts in the area such as housing shortages, traffic, overuse of assets, and other resource issues.

As discussed throughout this report, the outlook for continued tourism growth is incredibly strong in the greater Thomas area, which will fuel significant growth in service industry jobs and may contribute to population growth in coming years. (As shown on page 39, economic modeling shows the area's tourism demand could support up to

11 additional restaurants with an estimated 102 employees.) Yet the area already has significant workforce issues, and surveys show that local residents seek higher-paying jobs that are not tourism-based (Downstream Strategies, 2021).

Several recent studies, including a 2017 study by WVU Extension and this report, have examined resident attitudes towards tourism; however, no concerted planning process has yet been undertaken to figure out how to manage tourism in a way that best serves the

Plan for Hyperloop-spurred business growth

Hyperloop is promising to generate tremendous new economic activity for the state of West Virginia. It will be key for the City of Thomas and others in Tucker County to think ahead and strategically plan how they will capture as much of the Hyperloop activity as possible.

As shown in the Business Assessment on page 35, the construction of the \$500 million Hyperloop Certification Center is projected to directly support 1,102 jobs on average per year for five years. That's roughly equivalent to the current combined population of Thomas and Davis!

Not all of those employees will relocate to the greater Thomas area, but many will. In particular, the project's 655 direct construction workers will need local housing/lodging, places to eat and buy groceries, and other businesses to meet their needs while they are working in the area.

Thomas and Davis do not have adequate existing lodging, dining, or other business capacity to meet this need. As a result, unless area officials strategically plan for business growth and expansion, much of the economic activity related to the construction of the Hyperloop facility will bypass Tucker County.

Recommendations

- Fast-track community planning efforts before Hyperloop construction (or any other significant land development) begins in order to establish a vision for where and how development should occur.
- Within larger planning efforts, include a community engagement process focused on tourism to develop a cohesive vision for managing the impacts of tourism in local communities.
- Work with Tucker County officials to consider opening a County Resource Coordinator's Office to amplify community and economic development work throughout the county. Otherwise, fill the County Planner position with an experienced, certified planner with a competitive compensation package.



Tackle water and wastewater issues

According to development experts in the area, no significant growth can occur in Thomas or Davis until the area's wastewater issues are addressed. Steps are being taken by both Davis and Thomas to address their respective wastewater collection issues, as outlined below.

Current issues

DAVIS

The Town's wastewater treatment plant is frequently overwhelmed by stormwater (inflow and infiltration) and lacks modern tertiary treatment.

- The combined sewer system carries more water (sewage plus large amounts of rain and snowmelt) to the wastewater treatment plant than it can currently handle. The system regularly exceeds its permitted daily flow and mass loading limits in its discharge.
- Due to this capacity issue, the Town of Davis is largely unable to issue wastewater permits for new homes and developments.
- Even if stormwater is separated, the Davis system may need significant upgrades to its wastewater treatment plant to attain consistent compliance and accommodate growth.

THOMAS

The City's sewer plant frequently experiences permit exceedances for nitrogen and copper, as well as occasional exceedances for other parameters.

- The City's wastewater treatment plant discharges to the North Fork of the Blackwater River, which is a small headwater stream with strict effluent limits.
- The plant lacks tertiary treatment processes to remove nitrogen and may be experiencing other operational issues.
- Due to these treatment and compliance issues, the City of Thomas may be constrained in issuing wastewater permits for new homes and developments.

Steps being taken

The Town of Davis has hired an engineering firm to begin a sewer assessment to address their inflow and infiltration problem. Options for Davis' wastewater treatment plant are also being explored in an engineering feasibility study, commissioned by the Tucker County Development Authority (expected in Fall 2021).

Options for Thomas' wastewater treatment plant are being explored in an engineering feasibility study, commissioned by the Tucker County Development Authority (expected in Fall 2021). The City is also about to launch its final phase of improvements to separate stormwater runoff from the sanitary sewer.

In addition, the City is in the process of financing a new water plant and replacing its distribution lines.

With improvements to their wastewater treatment plant, Thomas could accommodate additional wasteload equivalent to approximately 100–200 additional single-family homes.

However, most of the areas currently seeking to connect to municipal sewer lie in closer proximity to Davis, whose wastewater treatment plant is currently overloaded due to stormwater inflow and infiltration and may also require treatment upgrades. This has stalled development at the County's industrial park and areas along Corridor H, which seek to connect to the Town's sewer system. As a

result, the Tucker County Development Authority has commissioned a feasibility study (to be released in Fall 2021) to explore how to best expand the area's wastewater capacity to accommodate development. (Leyh, 2021).

These actions taken by the City of Thomas, Town of Davis, and Tucker County Development Authority all reflect positive steps in the right direction. The engineering studies underway are being completed at a strategic time, given the outlook for significant infrastructure funding on the horizon.

Recommendations

- Complete studies underway and begin final plans for implementation as soon as possible to take advantage of coming financing options from the federal government
- Coordinate closely with Region VII Planning & Development Council to fund wastewater improvements.



Prioritize infill development

As shown in the Built Environment Assessment, Thomas and Davis each have properties in their downtowns that can and should be used to help meet the greater community needs. The City and its partners should prioritize infill development in areas with existing utilities wherever possible.

The success of the City of Thomas' brownfields work has shown that private owners are actively buying and redeveloping brownfield properties within downtown Thomas, which represents tremendous progress towards the community's revitalization.

Recommendations

- Continue working through the BAD Buildings Program to address absentee landowners and condemn dilapidated properties so that interested private developers can redevelop the property.
- Work with interested property owners to help them pursue available funding streams for redevelopment through the U.S. Economic Development Administration, the U.S. Small Business Administration, local lenders, and others.

Of the buildings and vacant lots identified as prime candidates for redevelopment in Thomas, several owners have indicated they already have plans to redevelop the property. The rising cost of building materials in 2021 has slowed several of these planned projects, as the owners are reportedly waiting for prices to lower before launching their project.

Building on recent successes, the following recommendations present ways to further encourage reuse of the identified spaces.



Pursue additional land for development

While infill development offers the most efficient use of municipal and county resources, there simply is not enough space within municipal limits to meet the incredible (and growing) need for housing and pressure for development.

Ultimately, private landowners will respond to the market and release land for sale and/or development. The Hyperloop project may very likely help unlock Western Pocahontas Properties land for housing and/or commercial development in Tucker County. In the meantime, the limited availability of land means that the City and its partners must work with landholders such as First Energy and

Land swaps with federal agencies

The U.S. Forest Service is one of several entities that holds key sections of land in and around the City of Thomas. One such section of land is particularly relevant to Thomas' revitalization. The Forest Service holds a strip of the railroad grade between downtown Thomas and the river, which is part of the City's utility corridor. These parcels are also of key importance to planned riverfront development, which has been a central focus of the City's brownfields redevelopment strategy to date.

Because this land is federally owned, the City's options for acquiring these parcels are fairly limited:

- The City can purchase the land at fair market value from the Forest Service.

Western Pocahontas Properties to try to allow for growth and address workforce housing in the immediate vicinity. Given the magnitude of the community's need, the City of Thomas and its partners should look for creative solutions and opportunities for collaboration with local landholding entities.

Once an area planning process is underway, the City and its partners should consider appointing an official to communicate and coordinate with landowners on their behalf. This individual would assist in advocating and negotiating for the community's interest and help arrive at mutually agreeable solutions for area development.

- Alternatively, the City can swap land of equal market value for the riverfront parcels.

The concept of swapping land for these parcels was explored in a 2012 study by Green Rivers. Initial conversations with the Forest Service indicated that the agency was open to the concept; however, formal conversations and negotiations have stalled in recent years.

The City now stands at a point where not owning these key parcels is stalling planned riverfront development. As a result, the need for a land swap is now pressing in order to continue with the City's brownfields implementation work.



Opportunities for developing mine-scarred land

Much of the privately held land in the area has been impacted by past coal development. The Hyperloop development—which will occur on formerly mined land donated from private hands to the WVU Foundation for the project—shows just how pivotal these brownfields can be for an area's redevelopment. Yet mine-scarred lands are often overlooked and underutilized as opportunities for brownfields redevelopment.

Looking forward, the City and its partners should keep mine-scarred land in mind as they map out their future brownfields strategy. Pursuing future grants from the EPA Brownfields Program focused on mine-scarred land opportunities could be a way to bring private landowners to the table.

Recommendations

- Appoint designated officials to coordinate with area landowners about development opportunities that promote the greater community's best interest.
- Revisit the land swap concept with the Forest Service and begin evaluating parcels that could potentially be proposed for a swap to obtain the desired riverfront parcels.
- Map out funding opportunities for redevelopment and explore interest from private landowners.



HOUSING

Build more workforce housing

As shown in the Market Assessment, the greater Thomas area will likely need several hundred additional housing units to accommodate the Hyperloop development and other overall growth. Given the pressing shortage of workforce housing, the majority of these units will need to be affordable—meaning in the \$100,000–200,000 range for a single family home serving those whose household falls within 50–120% of the area median income.

Market-rate developments typically offer no stipulations that any of the created housing units would be affordable. Given the market trends and current housing crisis, the greater Thomas area needs housing with mechanisms for long-term affordability built in, as well as provisions to ensure that affordable units cannot be converted into short-term rentals.

Employer-sponsored housing

One option for addressing workforce housing availability is for employers to offer housing for their workers. This model is especially common in the ski industry, where it is fairly commonplace for ski resorts to provide housing for their seasonal employees.

A review of housing options at 42 ski resorts across 10 states reveals that nearly half (20) of the resorts offer some kind of employee housing. (Among this list is West Virginia's Snowshoe Mountain Resort, which owns and maintains employee housing at multiple locations across the resort.) Ski resort employee housing typically consists of apartment- or dorm-style accommodations for seasonal workers. (MountainJobs.com, 2019)

Aspen, Colorado

The Aspen Skiing Company just opened a \$19-million, 53,000-square-foot apartment complex called the Hub at Willits in Basalt, Colorado. The complex has 43 units with 150 beds for its resort employees as well as childcare workers. Though still an approximately 30-minute drive to Aspen, it does provide a more affordable alternative to Aspen's competitive market. Aspen Skiing Company employees will pay \$550–800 per month and childcare workers will pay \$1,050–1430 per month, each about 30% of workers' income but still cheaper than units in Aspen. The Hub is just the newest of Aspen Skiing Company's efforts to develop and acquire affordable housing for its employees. Across its various housing facilities, from tiny homes to dorm-style apartments, the company maintains 800 beds. (Wood, 2021)

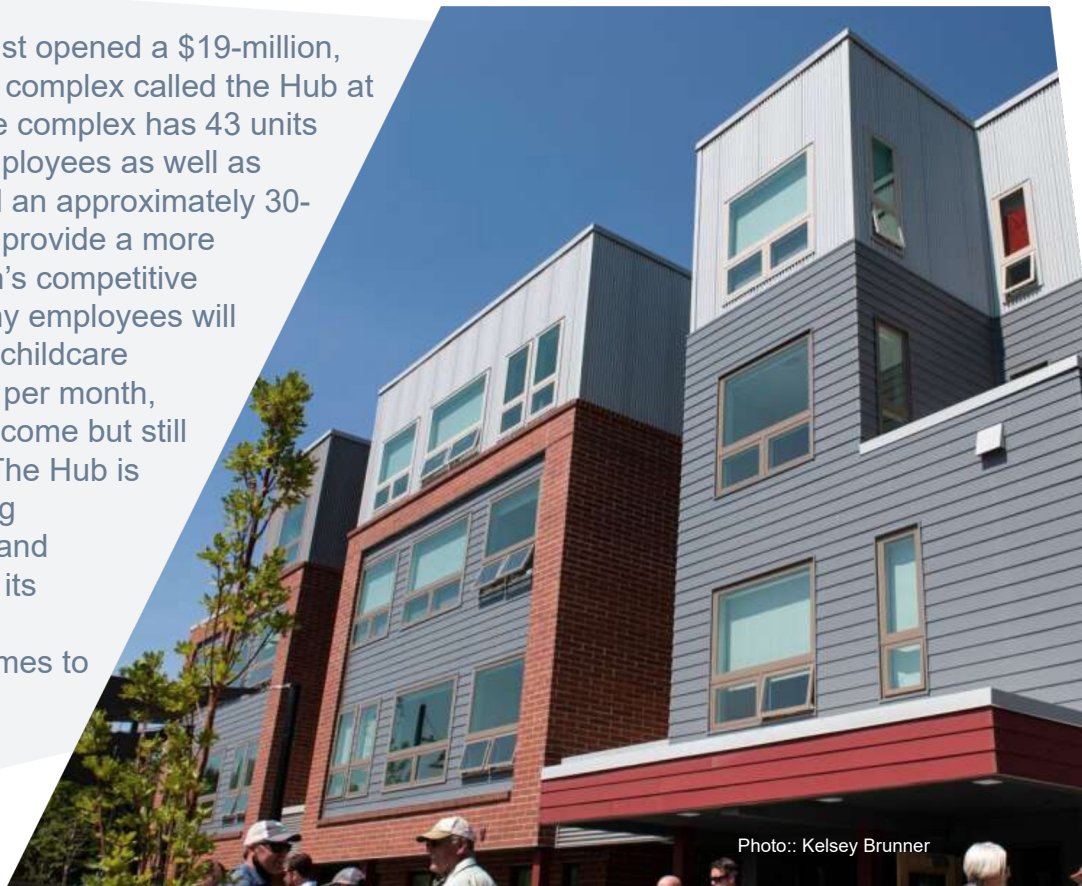


Photo: Kelsey Brunner

Breckenridge, Colorado

Leaders in Breckenridge have taken several avenues to increase available workforce housing stock, including building new complexes, buying existing buildings, and purchasing deed restrictions. So far, 350 newly developed units are in the works. Laurie Best, Senior Planning Manager at the Town of Breckenridge, said, “We’re making progress with inventory, but we can’t build our way out of this. There’s not enough land or money to add the number of units we’d need so it’s important that we preserve our existing inventory.” To help achieve this, the Town’s Housing Helps Program is paying around 1,000 homeowners to permanently deed-restrict their homes—which includes implementing workforce requirements and installing income limits. Ultimately, Breckenridge hopes to increase the share of locally occupied homes to 35% and the share of jobs held by non-commuters to 47%. (Krass, 2021)

“We always say if you’re a resort community and you don’t house your workforce, you’re not a community.”

– Laurie Best, Senior Planning Manager at the Town of Breckenridge, Colorado



Photo: Chris Baldwin

Jackson Hole, Wyoming

Jackson Hole is a resort town where the housing prices and overall cost of living far outpace what their workforce can afford, and the city is experiencing widespread staffing shortages much like Thomas. According to a Jackson Hole Chamber of Commerce survey, 94.5% of companies point to housing as the top contributor to staffing issues. Many employers are going out of their way to find lodging for their employees, from making room in their own homes to housing workers on site. Resorts and outfitters house a significant portion of their employees in dorm-style housing, deed-restricted homes, and RV parks. A local coffee shop built an apartment above its new drive-thru. Other businesses are seeking alternative ways to keep workers on board by providing housing, though most lack the space needed for employees to reside. (Arnold, 2021)

At least one notable employer in Tucker County is already providing some employee housing out of necessity. Canaan Valley State Park has recently housed employees within hotel rooms in the resort, due to the extreme shortage of affordable, available housing for their employees. As discussed further in the Market Assessment, finding and retaining adequately skilled staff is a major challenge for the resort. While taking hotel rooms out of service cuts into the resort’s profit, they consider it a necessary price to pay in order to have staff for the time being. (England, 2021)

Shared equity housing

Shared equity housing programs offer other avenues for making homes more affordable to qualified households.

Shared equity housing programs include an array of models that create long-term, affordable homeownership opportunities, generally by imposing restrictions on the resale of subsidized housing units (HUD PD&R, 2012). This helps bridge the gap between what people can afford to pay as a mortgage and the actual mortgage cost to own a property (The Urban Institute, 2021).

How it works:

- Typically, a nonprofit (known as a community land trust) makes a one-time public investment to make a home affordable for a lower-income family.
- In exchange for buying a home for less than its current market value, the family agrees to limit any future proceeds they would make if they sell the home.
- By “paying it forward,” the first family helps keep the home affordable for subsequent families long-term. (Grounded Solutions Network, 2021).
- There are usually income limits and residency restrictions to ensure the local workforce and community are served.

Community land trusts are community-run, nonprofit landholding organizations that sell or rent housing units, usually with the intent of keeping that housing affordable in perpetuity (Schneider, 2019). Woodlands Development Group is a community development organization and a Community Development Financial Institution (CDFI) serving Barbour, Randolph, and Tucker counties. As a current developer and advocate for workforce housing, Woodlands would serve as a natural fit for a community land trust and is already working with community leaders to determine feasibility and legal structure.

Some community land trusts increase affordability by removing the cost of the land from the sale price of a home. Similar to the model used by mobile home parks, the homeowner in this arrangement purchases the home but leases the land from the community land trust, which retains ownership. However, other community land trusts, such as Twin Pines Housing in White River Junction, Vermont, prefer a covenant model in which a legal deed restriction ensures the home will remain affordable upon resale (Hong, 2021).

Shared equity housing in Vermont

The State of Vermont has a robust shared equity housing program, which is funded through real estate transfer taxes. Through their model, local community land trusts provide up to 20% of the home's appraised value, typically through a subsidy from the Vermont Housing & Conservation Board or the Vermont Affordable Housing Tax Credit program. Buyers within the program's income and asset limits then secure their own mortgage, which covers the remaining 80% cost of the home and closing costs.

The Champlain Housing Trust is one of Vermont's oldest and largest community land trusts. Serving a three-county area with 625,000 people, Champlain Housing Trust owns or manages over 2,503 apartments, stewards 625 single-family shared equity homes, owns 140,000 square feet of commercial space, and provides services to five housing cooperatives. They also manage a loan fund that provides support for rehabilitation of single family homes and the financing of mobile homes throughout Vermont. (Champlain Housing Trust, 2019; Hong, 2021; Photo: Champlain Housing Trust)



Shared equity housing could be an effective tool for addressing Tucker County's workforce housing crisis. Since it represents an alternative to the traditional model of homeownership, the ultimate use and effectiveness of shared equity housing hinges on education and buy-in from homeowners, state housing agencies, and lending institutions.

States that have seen the biggest impact from shared equity housing are typically those that

Financing solutions

Relatively few housing assistance programs exist for households within 60-120% of the area median income. These households make too much to qualify for traditional government housing subsidies, yet they don't make enough to be able to afford market-rate housing in a place like Thomas. As shown throughout this report, housing for this workforce demographic is especially critical in the Thomas-Davis area, and many more workforce-level housing units are needed to fully support the community.

Shared equity housing models and incentives to developers offer two significant solutions that could be used to build more workforce housing

have invested in creating robust programs **with state agency commitment and financial support**. Vermont has roughly 1,200 shared equity homes statewide. These homes go to families making an average of \$54,800 per year who fill important workforce positions in education, health care, administrative, manufacturing, and customer service. Instead of paying rent, these shared equity homeowners build \$16,800 of wealth on average (Champlain Housing Trust, 2019).

in the area. However, additional local and state investments must be made to build enough housing to support the workforce. Intentional partnership-building between local leaders, nonprofit developers, land owners, and state agencies (specifically the West Virginia Development Office and the West Virginia Housing Development Fund) to build strategic financing strategies and goals is a crucial next step to get more workforce housing built.

Prioritize increased housing density

Increasing the density of housing in Thomas and Davis can help fit more units in a relatively small space.

Multi-family buildings

One way to increase housing density is by constructing new multi-family buildings such as duplexes, triplexes, apartments, townhomes, and condominiums. Multi-family units should be prioritized when adding housing through infill development, particularly when renovating Thomas' existing mixed-use buildings on Spruce Street and Front Street.

In urban areas, density bonuses are one way to encourage developers to include affordable units in their plans. Through these bonuses,

developers are allowed to build more housing units on a site if some of the units are set aside for affordable housing. Provided that local water and wastewater capacity can accommodate such developments, this could be an effective tool to both increase the number of units and ensure new affordable units are built in Thomas and Davis. Other incentives to construct workforce housing should be explored by the municipalities and county.

Tiny, mobile, and accessible dwelling units

Other avenues for increased density focus on adding new small or tiny housing units, such as tiny homes, mobile homes, garage apartments, and accessible dwelling units (ADUs). Given the lack of zoning in Thomas and Davis, there are no existing restrictions preventing such small units to be added to existing residential lots, where space permits. ADUs can provide crucial units for aging relatives or additional

workforce housing units that the community desperately needs. They also serve to build wealth for households who charge rent. However, some communities with housing shortages have found that, without explicit controls, ADUs are often converted into market-rate short-term rentals, which further exacerbates the area's housing shortage.



Slow the conversion of homes into short-term rentals

Compounding the area's persistent housing shortage is the fact that sold properties are being converted into short-term rentals at an alarming rate, which is further reducing an already limited overall housing supply.

According to zip code–based data available through AirDNA:

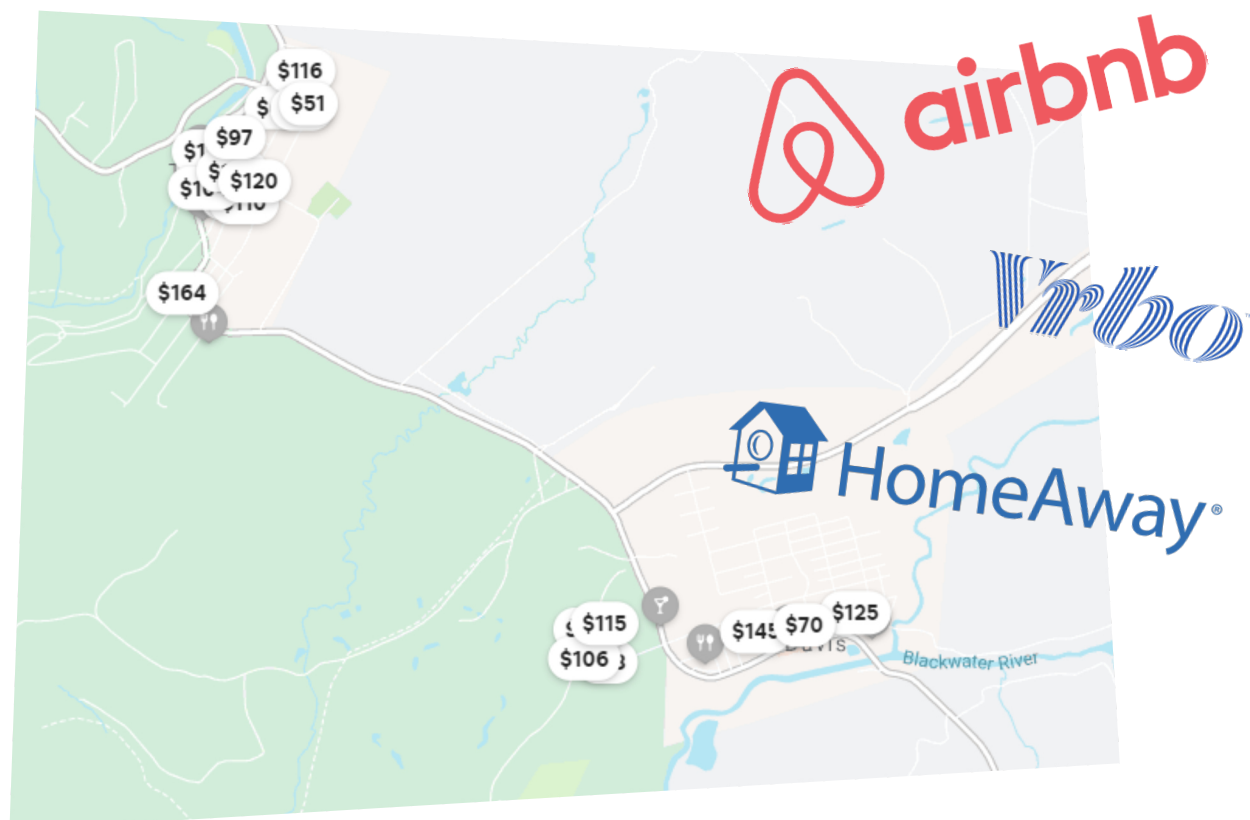
- The number of short-term rentals listed on Airbnb, VRBO, and other platforms in the 26292 zip code has increased from 17 in 2018 to 31 in 2021. Nearly all of these listings are within Thomas' City limits.
- In the 26260 zip code, the number of short-term rentals has increased from 279 in 2018 to 375 in 2021. These are concentrated in Davis and Canaan Valley. (AirDNA, 2021)

A review of these listings shows that most are homes or vacation homes that have been converted into short-term rentals. As detailed in the Housing Assessment, area realtors see this trend accelerating at a rapid pace.

Community sentiments surrounding short-term rentals are strong yet complicated. When asked

to share their thoughts on what would make Thomas and Tucker County a better place to live, many surveyed residents repeatedly voiced the desire to see fewer Airbnb-type rentals and more affordable housing (Downstream Strategies, 2021a). Yet many, if not most, residents know people in the area who rely on income from short-term rentals, and they recognize that these rentals play a big role in the local economy. They can be a wealth generator for families, which can in turn help fund further redevelopment projects.

Tourism-dominant communities across the globe have experienced this “Airbnb effect,” through which over-tourism facilitated by platforms such as Airbnb negatively impacts home prices and communities. Research conducted by the Harvard Business Review found that by incentivizing landlords to convert long-term rentals and for-sale units into short-term rentals, Airbnb is having a detrimental impact on local housing stocks across the U.S. (Barker, 2020)



What action are communities taking to combat the negative impacts of short-term rentals?

Close to home, the **Town of Davis** adopted a resolution on August 25, 2021 establishing a temporary moratorium on new short-term rental businesses until January 1, 2022. The Town is in the process of developing a legal framework for regulating short-term rentals within Town limits.

In **Hawaii**, Ordinance 19-18 strictly regulates the number and format of vacation rentals permitted on the island of Oahu. The law establishes a maximum limit of 1,700 bed and breakfast units to be rented at any time and sets stringent permitting, operating, and enforcement policies—including fines of up to \$10,000 per day. (Sokolowsky, 2019, 2021; Airbnb, 2021; Associated Press, 2021)

Cities including **Boston, New Orleans, Los Angeles, and Denver** only allow homeowners to rent out their primary residence as a short-term rental.

In **New York City**, a property can only be rented for under 30 days if the homeowner is present. Partial-property rentals are prohibited, so guests staying for fewer than 30 days must have whole-house access. “Class A” dwellings with three or more units cannot be advertised for renting lasting fewer than 30 days. The City imposes fines up to \$7,500 on non-compliant hosts. (Uradu, 2021)

Louisville, Kentucky requires non-owner-occupied short-term rentals to be at least 600 feet away from each other in residential areas and prohibits short-term rental hosts from advertising unlicensed short-term rentals on hosting platforms (Sokolowsky, 2019a).

The State of Washington is considering allowing municipalities to enact a tax up to 10% on short-term rental bookings on top of existing sales and hotel/motel taxes. The funds collected from the 10% tax would be allocated to affordable housing programs. If every municipality required the maximum tax, it would generate \$31.4 million toward affordable housing statewide. (Block, 2021)

Recommendations

- Begin formulating short-term rental regulations that, at a minimum, limit the conversion of existing long-term housing units into short-term rentals.
- Explore how a short-term rental tax similar to those proposed in Washington state (and other funding mechanisms) could help subsidize the construction of affordable housing in Tucker County.

Develop the area's workforce

Finally, as shown in the Business Assessment, workforce development is a critical bottleneck to economic development in the greater Thomas area. Businesses and employers of all kinds are struggling to find adequately skilled workers to fill their positions. Until this is addressed, the area's workforce limitations will significantly hamper business growth in Tucker County.

This problem is not unique to Tucker County; many communities and counties throughout rural America are struggling to find ways to enhance their local workforce. Yet there is one clear contributing factor that stands out in the greater Thomas area: lack

of workforce housing.

Addressing the critical shortage of workforce housing in eastern Tucker County (as outlined in Recommendations 5–7) is a necessary prerequisite for alleviating the area's workforce issues—though progress on housing can only be made with concerted community planning, area-wide wastewater improvements, and appropriate development (as outlined in Recommendations 1–4).

Seasonal work programs

Hiring locally is always preferable, yet sometimes (as is the case in Tucker County) local workers simply are not available.

Employers with large needs may need to consider bringing in workers from other areas. As part of a larger resort network, Canaan Valley Resort has brought in workers from partnering resorts in other states in recent years to fill essential positions.

Foreign workers offer another option, particularly for seasonal tourism jobs. Approximately 300,000 international students and young adults visit the U.S. for short-term work; the National Ski Areas Association estimates that about 7,000 of these foreigners are employed at ski resorts (Michelson, 2019).

One popular way to import eager employees is the J-1 visa program, currently used by many mountain ski resorts throughout the

U.S. The J-1 program is a federal work-and-study-based exchange visitor program in which non-immigrant visas are granted for approved individuals. Applicants must be between 18–29 years old, can stay up to four months, and must maintain at least \$1,500 in their bank account (BridgeUSA, 2021).

While generally considered less preferable to employing local workers, use of visiting workers does allow areas experiencing workforce limitations to meet high market demand. Employers can save nearly 8% in payroll expenses since J-1 visitors are exempted from some of the employee taxes incurred by U.S. citizens (IRS, 2021).





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APPENDIX A

Downstream Strategies survey methodology and approach

Downstream Strategies created and disseminated three surveys as part of its 2021 market study and revitalization plan for the City of Thomas:

- a housing survey, targeted towards full-time residents of Tucker County;
- a visitor survey, targeted towards people visiting Tucker County; and
- a business survey, targeted towards small business owners in downtown Thomas and Davis.

These surveys were distributed online and in-person in Tucker County from May 31, 2021 to July 5, 2021. Survey questions were informed by the questions used in Downstream Strategies' 2014 Tucker County Housing and Small Business Needs Assessment report but were improved and updated to reflect current conditions and project goals as well as incorporate stakeholder input. (Full copies of each survey instrument are attached.)

Key questions the surveys addressed for each demographic included:

	Housing survey	Visitor survey	Business survey
Target audience	Full-time residents of Tucker County	Visitors to Tucker County	Small business owners in Thomas and Davis
Number of responses	224	327	27
Focus areas	<ul style="list-style-type: none"> • What demographics and income levels are associated with different types of housing? • Are residents satisfied with their current housing, and do they have the agency to change their housing situation? • How much are residents currently paying for housing, and how does that compare to what they would like to pay? • What community services are lacking for residents? 	<ul style="list-style-type: none"> • Where are visitors coming from, and how often, how long, and what season(s) do they stay? • What are visitor preferences for lodging, dining, and activities in Tucker County? What amenities would they like to see more of in Tucker County? • What infrastructure and services do visitors perceive as lacking in Tucker County? 	<ul style="list-style-type: none"> • What are constraints and obstacles for the businesses? • Are current and/or available business spaces/properties affordable and adequate? • What are the prospects and factors for expanding? • How supportive are the local government and community? • What might help the businesses?

Survey questions underwent multiple rounds of input and revision before being finalized and released to the public on May 31, 2021. Surveys were distributed in two formats: online via SurveyMonkey and on paper. Survey participants were provided incentive in the form of four \$20 gift certificates to TipTop Coffee in Thomas, given to randomly selected participants. Frequent reminders on social media worked to publicize the surveys during the open window.

Distribution

The paper surveys were distributed periodically between May 31, 2021 and July 5, 2021 by the project team. The online surveys contained the exact same questions as the paper surveys. The questions for each of the three surveys were entered into SurveyMonkey, and each survey was officially open to the public on May 31, 2021 and remained open until July 5, 2021. To help facilitate survey-taking, the project team created a linkt.ree site landing page that included a logo for the City of Thomas, a brief description, and three separate button links to the resident, housing, and business surveys; a QR code that linked to the landing page was printed on the promotional materials and handout cards for easy access.

Additional surveys were distributed by the project team during the annual Mountaineer Days

APPENDIX B

Business survey



Do you own or manage a business in Tucker County? The City of Thomas, in partnership with Woodlands Development Group and Downstream Strategies, seeks your input on the needs and realities of small businesses in the greater Thomas and Davis area.



This survey is also available online at: <https://www.surveymonkey.com/r/thomasbusiness>

Downstream Strategies will randomly select **five survey participants to receive \$20 gift certificates to TipTop in Thomas**. To be entered in the drawing, please provide your phone number or email address: _____

- 1) Describe the type of business you own or operate: _____
- 2) In what Tucker County community are you located?
 - Thomas
 - Davis
 - Parsons
 - Other: _____
- 3) How many years has this business existed? (Select one)
 - 0–5 years
 - 6–10 years
 - 11–20 years
 - 20+ years
- 4) How many full-time equivalent positions (FTEs) does this business employ in total? (Select one)
 - 1–5
 - 6–10
 - 11–20
 - 20+
- 5) In what seasons does this business operate? (Check all that apply)
 - Spring
 - Summer
 - Fall
 - Winter
 - Year-round
- 6) Do you rent or own the business' current space? (Select one)
 - Rent
 - Own
- 7) Do you consider your business space affordable? (Select one)
 - Yes, the space is affordable.
 - No, the space is not affordable.
- 8) Is your current space limiting the business' ability to grow? (Select one)
 - Yes
 - No
- 9) If yes, are there other available properties nearby that are affordable and would meet your business' needs? (Select one)
 - Yes
 - No
 - Not sure
 - N/A

10) Do any of the following issues pose problems for your customers, employees, or overall business?
(Check all that apply)

- Lack of parking
- Limited cell phone service
- Limited high-speed internet
- Difficulty finding employees
- Other: _____

11) What is the single biggest obstacle your business faces? _____

12) How supportive is the city government of your business? (Select one)

- Very supportive
- Supportive
- Neutral
- Unsupportive
- Very unsupportive

13) How supportive is the local community of your business? (Select one)

- Very supportive
- Supportive
- Neutral
- Unsupportive
- Very unsupportive

14) What other types of businesses would you most like to see open nearby? _____

15) What would help your business thrive? (check all that apply)

- Marketing
- Better internet access
- Better employee base
- Financial assistance
- Business training and/or mentorship
- Computer training
- Other: _____

16) Do you expect your business to grow within the next five years?

- Yes
- No
- Not sure

17) Are you currently taking steps to grow your business?

- Yes (please describe): _____
- No

APPENDIX C

Visitor survey



Do you visit Tucker County? The City of Thomas, in partnership with Woodlands Development Group and Downstream Strategies, seeks your input on the needs and realities of visitors in the greater Thomas and Davis area.



This survey is also available online at: <https://www.surveymonkey.com/r/thomasvisitor>

Downstream Strategies will randomly select **five survey participants to receive \$20 gift certificates to TipTop in Thomas**. To be entered in the drawing, please provide your phone number or email address: _____

- 1) Please enter your home zip code: _____
- 2) Have you visited Tucker County before?
 - Yes
 - No
- 3) How many times have you visited Tucker County in the past three years? _____
- 4) In what seasons do you typically visit? (Check all that apply)
 - Spring
 - Summer
 - Fall
 - Winter
- 5) How long do you usually stay? (Select one)
 - A day
 - Weekend
 - Week
 - Up to a month
 - Other (please specify): _____
- 6) When you visit, how many people typically travel with your party? (Select one)
 - 1 (self)
 - 2-3
 - 4-5
 - 6+

LODGING

- 7) Do you own a vacation home or second home in Tucker County? (Select one)
 - Yes
 - No
 - I do not, but I am considering it
- 8) Where do you typically stay overnight when you visit Tucker County? (Select one)
 - Resort
 - Hotel or motel
 - Bed and breakfast
 - Vacation rental (cabin, house, apartment)
 - Campground
 - With friends/family
- 9) How satisfied are you with existing lodging options? (Select one)
 - Very satisfied
 - Satisfied
 - Neutral
 - Dissatisfied
 - Very dissatisfied

- 10) What forms of lodging would you like to see more of in Tucker County? (Check all that apply)
 - Resort
 - Hotel or motel
 - Bed and breakfast
 - Vacation rental (cabin, house, apartment)
 - Campground

DINING

- 11) What types of food and dining establishments do you typically visit in Tucker County? (Check all that apply)
 - Restaurants
 - Coffee shops
 - Bars/breweries
 - Grocery stores
- 12) How satisfied are you with existing food and dining options in Tucker County? (Select one)
 - Very satisfied
 - Satisfied
 - Neutral
 - Dissatisfied
 - Very dissatisfied

13) What type of food and dining establishments would you like to see expanded and/or improved in Tucker County? (Check all that apply)

- Restaurants
- Coffee shops
- Bars/breweries
- Grocery stores
- Other: _____

ACTIVITIES / THINGS TO DO

14) What types of activities do you typically enjoy in Tucker County? (Check all that apply)

- Outdoor recreation - winter activities
- Outdoor recreation - summer activities
- Shopping
- Arts and music
- Visiting cultural and historic sites
- Other: _____

15) How satisfied are you with activities and things to do in Tucker County? (Select one)

- Very satisfied
- Satisfied
- Neutral
- Dissatisfied
- Very dissatisfied

INFRASTRUCTURE AND SERVICES

16) As a visitor, did you have any issues with any basic services and infrastructure in Tucker County? (check all that apply)

- Roads and transportation
- Internet
- Cell service
- Emergency services (ambulance, EMS, etc.)
- Water or sewer
- Customer service and hospitality
- Signage and wayfinding
- Trailside amenities (parking, signage, etc.)
- Other: _____

17) Please share any other ideas which would make Tucker County an even better place to visit.

APPENDIX D

Resident housing survey



Do you live in Tucker County, West Virginia? The City of Thomas, in partnership with Woodlands Development Group and Downstream Strategies, seeks your input on the needs and realities of residents in the greater Thomas area.



This survey is also available online at: <https://www.surveymonkey.com/r/thomashousing>

Downstream Strategies will randomly select **five survey participants to receive \$20 gift certificates to TipTop in Thomas**. To be entered in the drawing, please provide your phone number or email address: _____

- 1) What community do you live in or near?
 - Thomas
 - Davis
 - Canaan Valley
 - Parsons
 - Hambleton
 - Hendricks
 - Saint George
- 2) Describe your residence status. (Select one)
Note: *If you do not live in Tucker County, please complete the visitor survey instead: www.surveymonkey.com/r/thomasvisitor*
 - I live in Tucker County full time.
 - I live in Tucker County part of the year.
- 3) What type of housing do you live in? (Select one)
 - Single-family home
 - Apartment/condo
 - Mobile home
 - Other: _____
- 4) Do you rent or own this home? (Select one)
 - Own (with or without a mortgage)
 - Rent
 - Other: _____
- 5) How many people live in your household?
 - 1
 - 2–3
 - 4–6
 - 7+
- 6) With whom do you live? (Check all that apply one)
 - Self
 - Immediate family
 - Extended family
 - Housemates
 - Other: _____
- 7) How long have you lived in this location? (Select one)
 - 0–5 years
 - 6–10 years
 - 11–20 years
 - 20+ years: _____
- 8) If you rent, would you like to own your own home? (Select one)
 - Yes
 - No
 - Not sure
 - N/A - I do not rent.
- 9) How satisfied are you with your current housing situation? (Select one)
 - Very satisfied
 - Satisfied
 - Neither satisfied nor dissatisfied
 - Dissatisfied
 - Very dissatisfied
- 10) If you are unsatisfied with your current housing situation, what are the primary reasons? (Check all that apply)
 - The cost is too high.
 - The home is too small.
 - The home lacks desired features and/or is outdated.
 - The location is inconvenient.
 - I have issues with the neighbors.
 - Internet and/or cell service is limited.
 - Other: _____
- 11) Are you able to change your housing situation? (Select one)
 - Yes
 - No

- 12) If you are unable to change your housing situation, what are the primary reasons? (Check all that apply)
- Other housing options are too expensive.
 - There are few available homes in my preferred size and/or price range.
 - I do not have access to loans or assistance programs.
 - Other: _____

- 13) Where do you work? (Select one)
- I commute to work in Tucker County.
 - I commute to another West Virginia county for work.
 - I commute to another state for work.
 - I work remotely.

- 14) What types of housing would you like to see more of in Tucker County? (Check all that apply)
- Single-family home
 - Apartment/condo
 - Mobile home
 - Other: _____

- 15) What is your approximate annual household income? (Select one)
- Less than \$20,000
 - \$20,000–30,000
 - \$30,000–40,000
 - \$40,000–50,000
 - \$50,000–60,000
 - \$60,000–75,000
 - \$75,000–100,000
 - \$100,000–150,000
 - \$150,000–200,000
 - \$200,000+

16) How much do you currently pay monthly for your rent or mortgage? _____

17) What would be your preferred maximum monthly payment for rent or a mortgage? _____

- 18) Where do you do your primary grocery and household shopping? (Select one)
- Davis, WV
 - Parsons, WV
 - Oakland, MD
 - Elkins, WV
 - Other: _____

19) What types of businesses would you most like to see open in Tucker County?

20) Please share any other ideas which would make Tucker County an even better place to live.
