

2025

Housing Study

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Housing Research at
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&

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Engineering**

For:

Shenandoah County

&

Town of Woodstock



Background

Shenandoah County and the Town of Woodstock commissioned the Virginia Center for Housing Research at Virginia Tech (VCHR) and Summit Design and Engineering to conduct a housing needs assessment, market analysis, and a review of policy and infrastructure to calibrate potential housing development contemplated in their comprehensive plans. Shenandoah County adopted a new Comprehensive Plan in September of 2024 and the Town of Woodstock adopted their new plan in January of 2025.



The two plans are well connected, with the County’s goals of preserving its rural landscape and driving growth towards historic hamlets and its many towns being aligned with Woodstock’s goals of looking “inward rather than outward” to accommodate future growth. The report documents this analysis and offers recommendations to improve the pace and variety of residential development in high-demand places across the county.

Orientation: Households

There are 44,630 people living in 17,782 households within Shenandoah County. Households are concentrated within the towns of Strasburg and Woodstock, which contain 16% and 13% of the county's population, respectively. Of the households in Shenandoah County, 12,877 (72%) own their homes, and 4,905 (28%) are renters. The proportion of homeowners within the county is slightly higher than the Virginia statewide figure of 67%.

Renters tend to have lower incomes. Twenty-eight percent of renters have household incomes below \$25,000, compared to just 14% of homeowners. Sixty-one percent of renters have household incomes below \$50,000, compared to 31% of homeowners. While homeowner incomes are more evenly distributed, 35% have household incomes greater than \$100,000, while just 9-19% of renters fall within this household income range.

*U.S. Dept. of Housing & Urban Development
Definitions:*

Cost burden - Monthly housing costs (including utilities) exceeding 30% of monthly income.

Severe cost burden - Monthly housing costs (including utilities) exceeding 50% of monthly income.



Orientation: Households (cont'd)

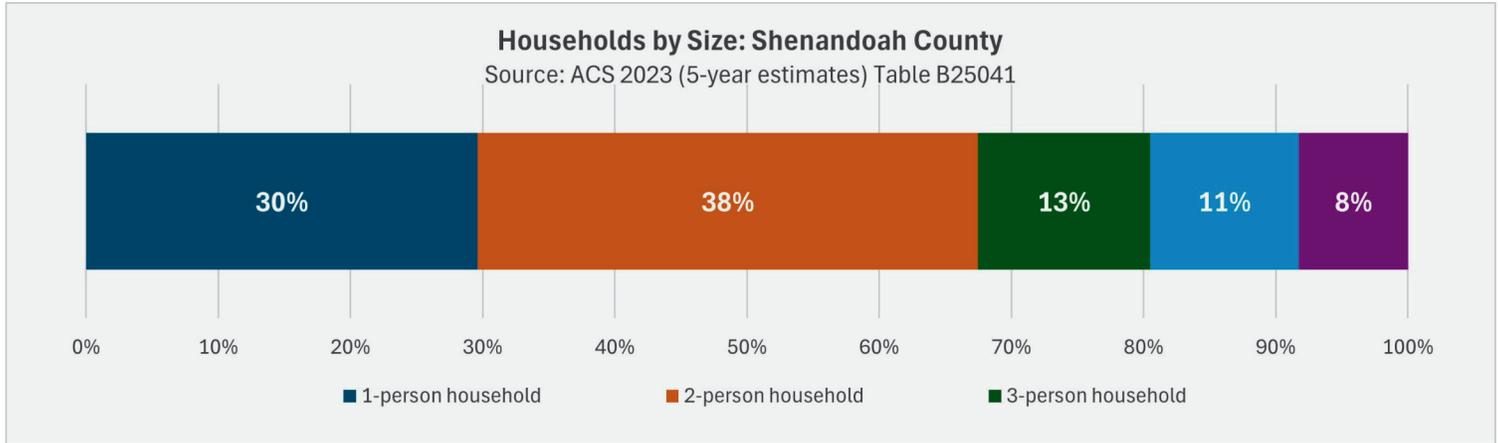
When a household is housing cost burdened, they may prioritize housing costs over other necessities such as food, healthcare, transportation, and education. Just over one quarter (26%) of households in Shenandoah County spend greater than 30% of their income on housing costs and may need more affordable housing options. Among them, 2,242 (13%) households spend over half of their income on housing costs. These households may be unable to afford housing without sacrificing other elements of their basic well-being and may be at risk of homelessness if they encounter an emergency expense or other sudden economic hardship.

Households are primarily made up of one or two people: 66% of homeowners and 72% of renters live in single person or two-person households (see graph on following page).

These households are likely to be a mix of both aging and younger adults living alone or as couples. Among homeowners generally, householders tend to be older, with 60% being above age 55 as compared to up to 42% of renters.

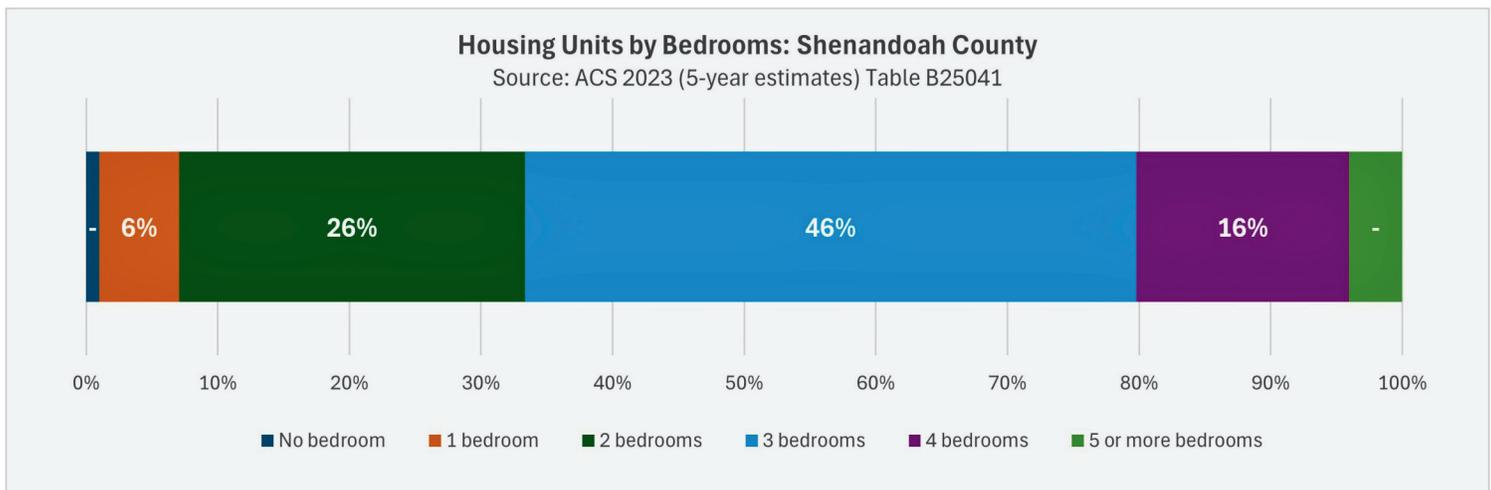


Just over one quarter (26%) of households in Shenandoah County spend greater than 30% of their income on housing costs and may need more affordable housing options.



Orientation: Housing Units

There is a mismatch between the number of bedrooms in the county’s housing units and the number of people that make up the county’s households. Nearly half (46%) of the housing stock in Shenandoah County is made up of three-bedroom units, and 67% of units have three or more bedrooms. Originally built to serve larger average household sizes in the past, these units no longer match the needs of most county households.



In Shenandoah County, 63% of housing units are over 30 years old, and 32% of housing units are over 50 years old. Just 5% of the county’s housing stock was built after 2010. The towns of Mount Jackson and Toms Brook have the highest proportions (at least 44%) of housing units built before the year 1970. Homes require regular maintenance, with upgrades, modernizations, and replacements typically needed every 10-15 years. Houses built before 1990 may contain outdated finishes or components, and those built before 1980 may contain problematic components, like knob-and-tube wiring or other outdated electrical installations, lead paint or pipes, and inadequate or unsafe insulation.

Orientation: Housing Units (cont'd)



There are 3,537 vacant housing units in the County. Vacant units refer to those units which do not serve as a usual or permanent residence for any household, and can include seasonal units, abandoned units, as well as units that are actively for sale or for rent. Most of the county's vacant units are for recreational or occasional use (56%). Basye's popular Bryce Resort attracts short-term renters and vacation homeowners, accounting for nearly half of the units vacant for recreational or occasional use. Less than 36% of vacant units in the county are abandoned, undergoing renovation, in foreclosure, or otherwise held vacant without being for sale or for rent. A small portion of the county's vacant units are for rent (111 to 381 units) or for sale (82 to 322 units).

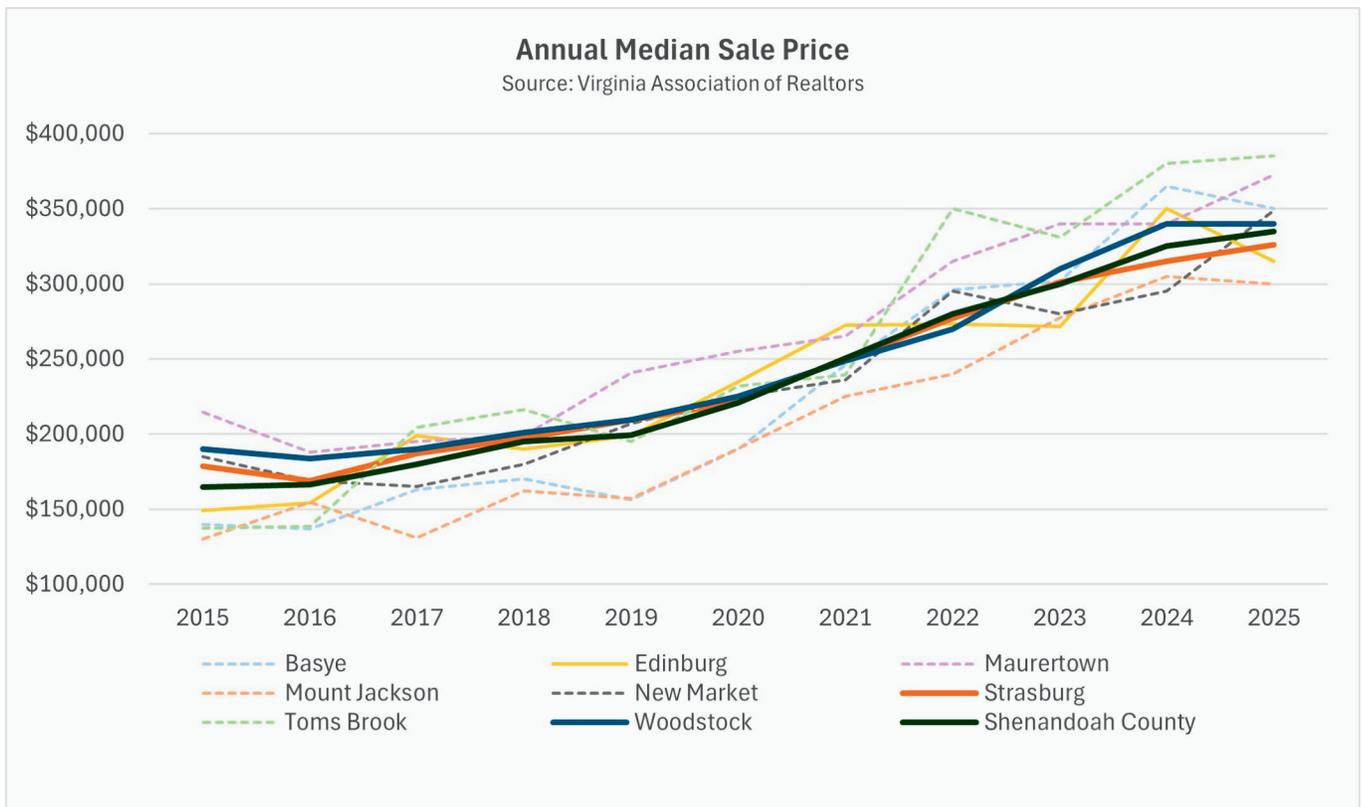
Most of the county's vacant units are for recreational or occasional use (56%).

Demand

Housing demand has broad facets: type, location, and price. VCHR uses market vacancy rates, median days on the market, changes in median rent and changes in median sale price to assess overall demand level. County household characteristics, resident commuting patterns, local home sale and property management data, and national consumer surveys help VCHR gauge demand for housing units by type, location and price.

Housing demand is strong in Shenandoah County, indicated by

- a low market vacancy rate, less than 3%
- a 24% increase in rent 2018-2023
- median days on the market less than 20 at all price points
- a 54% increase in median sale price 2018-2023.



Homeowner vacancy rates and home sale trends suggest that the strongest homebuyer demand in Shenandoah County is currently concentrated in Strasburg, New Market, Maurertown, and Woodstock, where vacancy rates are low and homes sell quickly. Strasburg, Woodstock, and New Market also contain the most rental units (total and multifamily) and have shown low rental vacancy rates and more positive absorption

Demand (cont'd)

numbers in recent years compared to other towns in the county, indicating concentrated rental demand. While these towns show the highest demand right now, current demand patterns reflect existing infrastructure, regulations, amenities, and market accessibility.

Investments targeting other towns across the county to develop the infrastructure, amenities, and services that make the county's higher-demand areas attractive to buyers and renters could expand or shift demand beyond where it is currently concentrated.

Demand segments among existing residents can be readily quantified:

- 2,242 households may need more affordable housing options. These households experience severe housing cost burden and likely sacrifice necessities such as food and healthcare to pay for housing. Affordable housing can come in many forms, for example, smaller housing with lower land costs, attainable homeownership opportunities that fix housing cost through mortgage financing, subsidized rental housing, energy efficient housing that lowers operation costs.
- 6,224 households may benefit from a smaller housing unit that may be smaller and more appropriate for aging or smaller and more manageable for young professionals or families. Built for larger household sizes of the past, much of the county's existing housing stock does not match the changing demographics of current households.
- 5,843 households are led by individuals aged 65 or older. According to local stakeholders, seniors in the county want to age in single-story homes tailored to their needs and have a strong preference to live near Shenandoah Memorial Hospital in Woodstock.

Demand (cont'd)

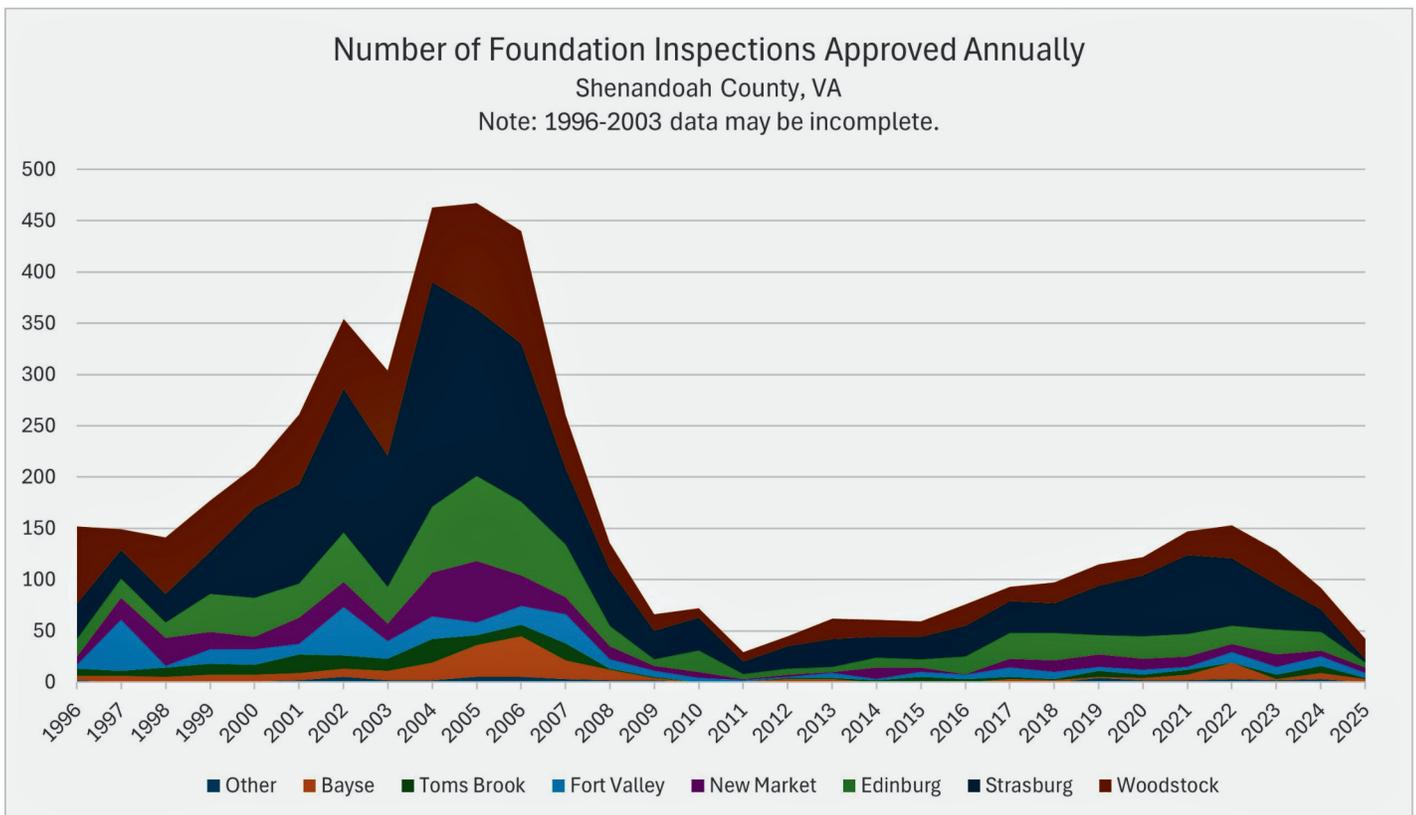
Note that potential demand does not translate directly into development goals. As landowners, developers and builders add needed housing, it can be occupied by current residents or new residents. Further, demand is dynamic—current residents may move to a home as soon as it becomes available or may wait for another option. They may also choose to move out of the County. Developers use overall demand metrics, size of demand segment, absorption rates, and development costs to determine if they can endeavor to build a given housing type. Local governments can reduce development costs using regulatory tools and provide financial incentives to influence developer choices.

Demand from prospective residents is less likely to be finite and will change based on affordability and availability in the County compared to the places in the surrounding region. Demand from prospective residents can be characterized qualitatively based on demand segment (seniors, out-commuters, first-time homebuyers, etc.). Workers who currently live in higher-priced, tighter housing markets are a distinct demand segment for the county. Commuting patterns suggest Strasburg, Toms Brook and New Market are most attractive for out-commuters, likely due to their close proximity to neighboring employment centers.



Supply

Shenandoah County saw a period of sustained and increasing home construction in the second half of the 20th century, with a peak in construction rates during the period from 2001 through 2006. After a dramatic collapse in construction rates (from over 400 in 2006 to less than 50 in 2011), the county saw a steady slight increase in construction starting in 2012 and peaking in 2022 before declining again in the most recent years. Strasburg has consistently seen the bulk of the county's new housing construction, with Woodstock, Edinburg, and New Market also consistently seeing large shares.



Supply (cont'd)

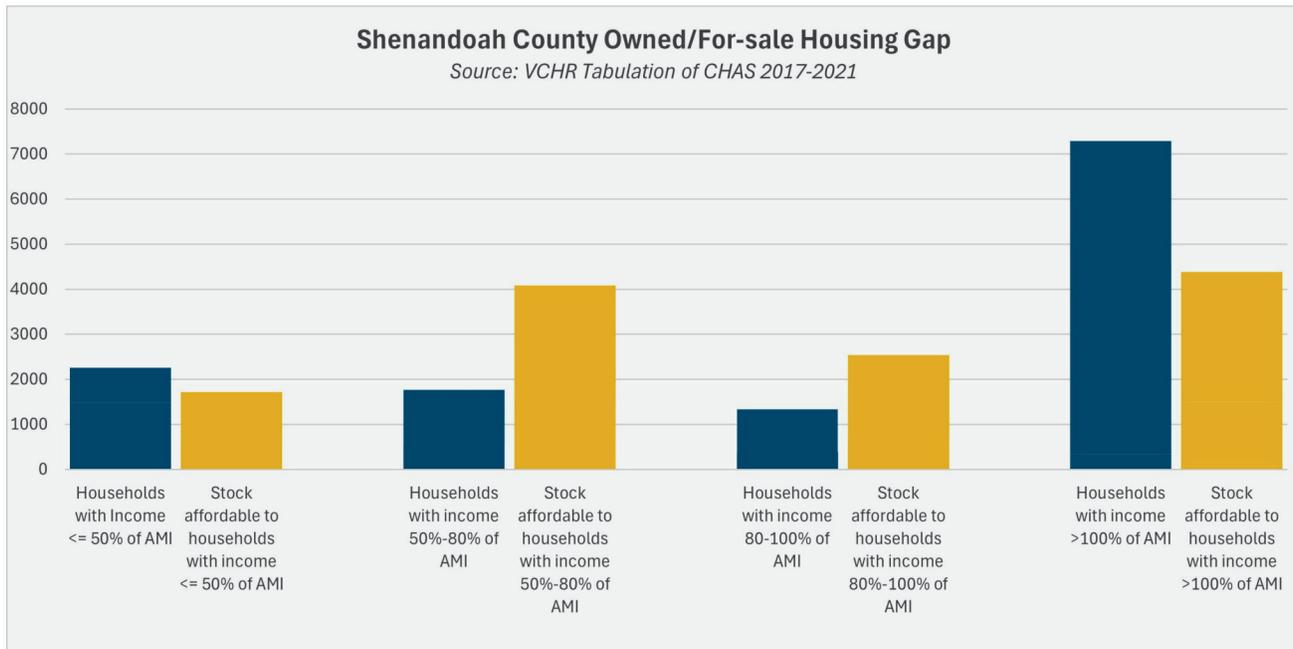


Nonetheless, the County’s housing stock is still dominated by larger units built for larger families of prior generations. Since recent building has not met demand, in terms of quantity or type, prices and rents have increased dramatically and supply gaps have developed in nearly every income segment.

Shenandoah County does not contain enough rental units that are affordable to serve the number of households earning less than 30% of the Area Median Income (AMI). Additionally, there is a mismatch between the number of households earning above 80% of AMI and the limited supply of rental housing priced to serve them. Much of the region’s rental housing (54%) is priced within the affordability range for households earning 50–80% of AMI. However, the lack of supply on either end of the income spectrum (specifically for those earning below 30% and above 80% of AMI) concentrates both lower- and higher-income renters in this middle affordability band. When these groups compete for the same housing, lower-income households are at a disadvantage.

Area Median Income (AMI) is a metric calculated annually by the U.S. Department of Housing and Urban Development. AMI is defined as the midpoint of a specific area’s (e.g., a county’s) household income distribution, and is adjusted based on household size.

Supply (cont'd)



Shenandoah County lacks a sufficient supply of owner-occupied housing that is affordable and available to households earning less than 50% of the Area Median Income (AMI), and more than two-thirds (68%) of the homes with monthly costs that are affordable for this income group are occupied by households with higher incomes. Many higher-income homeowners in the county reside in homes that cost less than their budgets could reasonably support, with 2,580 households earning greater than 100% of AMI occupying homes that could be affordable to households earning less than 80% or less than 50% of AMI. The lack of supply for households with income above the median prevents these households from “trading up” and freeing up less expensive housing for low-income households, often first-time homebuyers.

Specific gaps and opportunities for development in the county’s housing supply include the following:

- Affordable rentals for low-income households: small one- to two-bedroom units priced affordably for households earning less than 80%, less than 50% and less than 30% of AMI
- Affordable starter homes: small single-family detached homes (under 1,500 sq. ft.), duplexes, and townhomes priced affordably (under \$250k - \$300k) for young families, first-time buyers, and essential workers in the community (e.g., teachers, firefighters, police officers, and healthcare workers)

Supply (cont'd)

- Senior housing: small, single-story detached homes or duplexes with one to two bedrooms designed for accessibility and nearby healthcare services (e.g., Shenandoah Memorial Hospital in Woodstock), including continuing care retirement communities.
- Higher-end homes: large, detached homes with modern amenities to absorb demand from higher-income workers (e.g., commuters who work in Winchester, Harrisonburg, and the D.C. area) and relieve pressure on mid- to lower-priced housing on the market.

Land Use Context

Both Shenandoah County and Woodstock will need to make regulatory changes to promote the development their comprehensive plans envision for the Town and the County’s villages and hamlets. The regulatory changes suggested in this report will allow development that is diverse and dense enough to respond to demand, while maintaining the character that residents of both localities value. Current regulations make some development, such as low-density residential single family detached units located outside of built-up areas, easy to construct, while the desired dense, varied, and walkable neighborhoods that preserve local character nearly impossible to achieve.

Shenandoah’s residential zoning districts are located primarily along the Interstate 81 and Route 11 corridor in the center of the county, with more concentrations of these zones nearest to the incorporated towns and villages. There are also smaller areas of residential zoning in historic hamlets and villages. The R-2 district accounts for 4,086 acres or 1.3% of the county and R-1 accounts for 3,588 acres or 1.1% of the county. Over 96% of land area

within Shenandoah County is dedicated to either Agricultural Zoning or Conservation Zoning within the A-1 or C-1 districts. State and National forest lands account for 73,360 acres, or 23% of the County, all of which are located within C-1 zoning districts.

SHENANDOAH COUNTY ZONING DISTRICTS BY ACRE AND PERCENT OF THE COUNTY

Zoning District	Acres	% of County
A-1	157,775.7	50.3%
B-1	79.9	0.0%
B-2	583.4	0.2%
C-1	144,831.1	46.1%
M-1	2,242.9	0.7%
M-2	198.1	0.1%
R-1	3,588.0	1.1%
R-2	4,086.7	1.3%
R-3	537.3	0.2%
R-4	51.2	0.0%
Total	313,974.2 -	

Source: Shenandoah Co. GIS, Summit Calculations

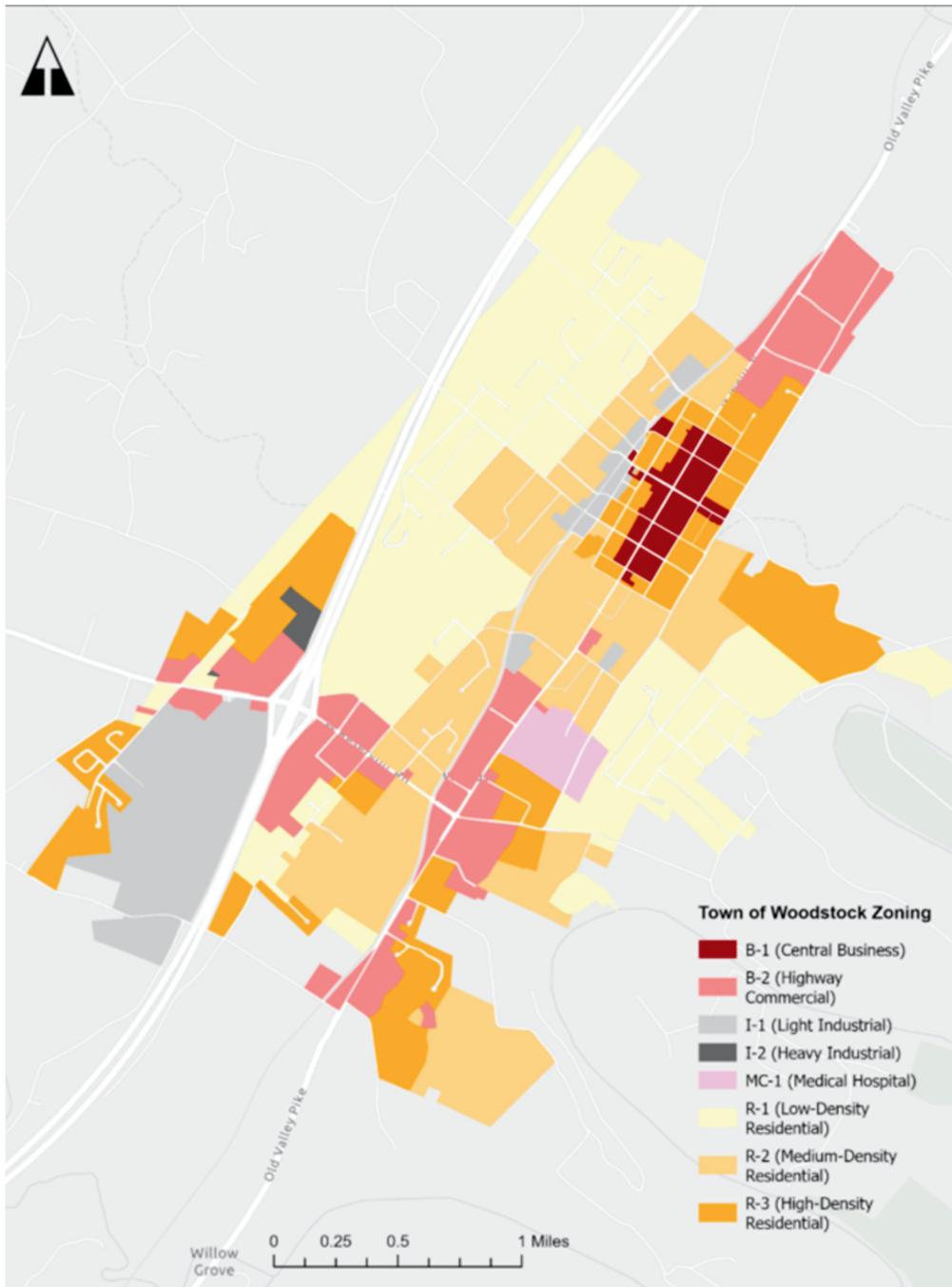
Land Use Context (cont'd)

Most of the Town is zoned to support residential development, with some areas dedicated to commercial or industrial development. Unlike Shenandoah County, Woodstock has a “mixed-use” district in that the B-1 central business district permits both residential and commercial development.

The R-1 district is the largest, accounting for nearly 740 acres (34%) of the total land area within Woodstock. The R-2 district is the next largest zoning district, encompassing about 500 acres of land in the town, followed by the R-3 district with nearly 350 acres. The B-1 district accounts for the denser downtown area of Woodstock, which has a mix of uses and permits multifamily buildings up to 45 feet tall.

TOWN OF WOODSTOCK ZONING

Source: Shenandoah County GIS, Summit Calculations



Regulatory Barriers

Over time, regulations have made attached housing types, like townhomes and duplexes, multifamily housing and mixed-use buildings harder and more costly to develop. The relationship between residential zoning districts, the ability to develop multiple housing types, and associated requirements like parking all influence development decisions. The County and Town will need to allow a variety of housing types and remove costly requirements to respond to housing demand and promote vibrant mixed-use places while preserving rural character.

For example, the County R-3 minimum lot size of 20,000 square feet for a single family detached unit is the same as the lower density zone of R-2 and only 10,000 less than R-1, offering little incentive in terms of density to rezone to R-3 and provide more housing. If a townhome or apartment building is proposed in the County, a Special Use

Permit is required, with another level of review with subjective “character” or “congestion” criteria for evaluating a proposal. Unclear or subjective criteria for approval adds risk for developers and disincentivizes development.

In Woodstock, the R-1 minimum lot size, 17,500 if the lot has public water and sewer, is nearly as large as the County’s R-3, offering little step-up in density from the County. Increasing the allowable density and variety of housing formats (only single family detached units are allowed) would more readily signal to developers that the Town envisions itself as the core area for development.

Where multifamily units are allowed, R-3 and B-1, they are limited to approximately 3 and 4 stories respectively. Additional dimensional requirements for residences in B-1 (20’ of setback, 12’ of side yard, and 25’ of rear yard) discourage mixed use development.



It’s easier to build the type of structures on the left, and harder to build the structures on the right. This is despite the benefits to affordability and bringing life to towns, villages, and hamlets that mixed uses and more dense development can bring.

Infrastructure Limitations

Water and sewer infrastructure limit where housing development is feasible, within incorporated towns and in some cases, just outside of town limits. Nearly all properties within the Town of Woodstock are connected to Woodstock’s water and sewer system. Woodstock’s ability to provide water and sewer to a majority of its neighborhoods make it a more feasible place to develop housing when compared to most areas in Shenandoah County.

Outside of most of the incorporated towns, much of the utility infrastructure is located within the area along Route 11, nearest to Tom’s Brook and Maurertown, and serving the Southwest area around the Bryce Resort. This fact makes compact larger-scale development outside of pre-served areas nearly impossible and can lead to circumstances where development follows a sprawled pattern.



The current extent of public water and sewer systems limit where new development can be located; however, the preserves the rural landscape and helps target growth and redevelopment of new units “inward rather than outward” to avoid sprawl.

Recommendations

These recommendations will help Shenandoah County and Woodstock implement their comprehensive plans and respond to increasing housing demand. Some of the recommendations, such as reducing lot sizes or increasing height limits while updating the Zoning Ordinance, are not exhaustive of every change that should be followed by Shenandoah County and Woodstock in their respective ordinances, or by other Towns in the region to provide more housing units. Transparency, engagement, and community collaboration will further support regulatory changes to achieve both communities' vision.

Allow for Mixed Use Buildings to Serve as “Building Blocks” for Growth

Historically, main streets incorporated a mix of various types of buildings, including single family detached and attached, commercial buildings, and retail buildings with dwellings on upper levels. These “building blocks” of core town main streets, or small hamlets, are typically historic buildings that do not conform to the current rules and cannot be rebuilt or replicated. Allowing new development of “Mixed Use” buildings, that incorporate commercial uses and residential uses on the same property can help provide new housing opportunities, make main streets and hamlets more vibrant, and use land more efficiently, preserving the countryside.

The Woodstock Comprehensive Plan’s big ideas to “Build on Woodstock’s Foundation” and “Weave Activity Centers Together” can capitalize on demand to develop new mixed use buildings to support the further development of residential housing units of varying types and sizes. While the Zoning Ordinance in Woodstock currently supports new mixed-use development in the B-1 district, covering downtown, other areas such as the identified Gateway Areas (pg. 136-137) on the future land use map, will require new zoning districts or amending the B-2 Highway Commercial district in order to allow for development.

Virginia Housing’s Mixed-Use/Mixed-Income (MUMI) loans can be used to finance a residential property with a commercial/retail component under certain conditions. The program requires that a percentage of units be reserved for residents whose annual income does not exceed certain limits. The rest of the units may be rented to residents at any income level, including a requirement that some units have no income restrictions, commonly referred to as market rate units.

Consider Increasing Height Limits to 45-60 Feet in R-3 or New Mixed Use Zoning Districts.

The ordinances of Woodstock and Shenandoah County currently encourage more horizontal, shorter development patterns that visually take up more of the local horizon, whereas taller buildings would allow for views of the natural landscape from the buildings and save space around a community by allowing more compact development. The tallest residential structures in Shenandoah County or its incorporated towns are capped at 35' and 45' in height. A modest increase of 10-20 feet could add an additional floor onto allowable buildings.



Create a New Zoning District for Hamlets and Villages with Reduced Lot Size Minimums



Create a new district that could be restricted to within a geographic limit of each identified hamlet for new smaller lots. Historic urban lot sizes could be 2,000, 3,000 or even lower square footage for single-family detached, attached homes, or triplexes/quadplexes. Within targeted locations, such as towns or hamlets, a district permissive of small lot sizes could help improve the local economy and housing opportunities in that hamlet.

Establish Transfer of Development Rights

Shenandoah County's Comprehensive Plan (pg. 42) identifies sending and receiving areas for a Transfer of Development Rights (TDR) program. The Town of Woodstock's Comprehensive Plan (pg. 127) identifies the entire boundaries of the community as being a potential receiving area for a future program. This sets up the potential for formally establishing a TDR program that effectively preserves the rural landscape while building up core areas. The County and Towns must develop incentives and a transfer ratio determining the number of development credits received per acre protected, amount of prime agricultural soil preserved, dollar value of the land, or other factors can determine how many additional units a developer could receive

per credit purchased. Guidelines should be made clear so that local staff can communicate between landowners and developers where land is being preserved and why a density bonus is being given.

Combined with efforts to diversify the types of housing available and other ordinance changes, a TDR program can provide more units in closer proximity to walkable areas. For example, a new mixed-use building may purchase the right to develop additional units if acreage in rural Shenandoah County is preserved. The application of increased density will be more possible if modest increases to height of structures are allowed.

Expand Public Facilities Only to Expand Capacity Where Growth Is Targeted

Contemporary planning efforts reverse previous trends of expansion of utility systems into hinterland areas in order to develop more housing. Today, to build more compact local communities, the underlying regulations and capital investment decisions need to be aligned with orienting growth "inward" rather than "outward." Water and sewer systems should only be expanded or developed where growth and density is specifically

targeted, such as the towns, villages, and hamlets. This will keep the cost of ongoing maintenance of the systems more efficient and allow for tax-positive development (that acts as the building blocks of making each community more vibrant) that keeps the community fiscally sustainable. Within these targeted areas, capacity should be expanded to allow for greater densities and diversity of types of residential units to support new housing opportunities.

Informational Campaign to Build Awareness Land Use Tools to Target Development

The County and Town’s Comprehensive Plans acknowledge the housing affordability crisis affecting the region. This situation is not unique to the County or Woodstock and is shared across nearly the entire Commonwealth of Virginia and United States at large. The Town and County’s planning efforts have already attracted development proposals to provide more diverse housing types and sizes. In recent years, Woodstock has also supported and approved new types of housing units as well as made amendments to the Zoning Ordinance to allow new types of development. However, continued implementation of the comprehensive plan will require sustained community engagement.

Change in the built environment can be difficult to conceptualize and is often regarded with fear of adverse changes in ones’ living situation or quality of life.



Shenandoah County, Woodstock, and other Towns can collaborate to communicate and showcase the community benefits of new growth and development. Ongoing conversations about implementing the comprehensive plan can help zoning negotiations focus on the best outcomes for the community at large.

Virginia Housing’s Community Impact Grant program funded this study as an initial step toward responding to housing demand and achieving the Town and County development vision. Additional funding in this program can be use for community outreach, design and planning to provide housing and spur economic growth.



Update Woodstock's Zoning Ordinance to Promote Housing and Implement the Comprehensive Plan

Woodstock's Zoning Ordinance, like many others across Virginia, needs to be updated to reflect the Town's newly adopted Comprehensive Plan. The ordinance update should include the variety of changes mentioned in the Goals and Actions of the Comprehensive Plan. Streamlining the development review process, allowing for flexibility in design and type of housing, allowing Accessory Dwelling Units, reducing dimensional requirements, and other changes will lead to the creation of new housing units.

Woodstock's zoning map features a density gradient that has majority of the land zoned as low-density residential. However, to preserve the rural landscape outside of town and to promote the growth and vibrancy in town, Woodstock should begin to think of itself from border to border as the appropriate place for growth and density. This means that the gradient of density from the County should be maintained, and the "bar" for Town residential districts should be raised.

Implementation Matrix

	Recommendation	Expected timeframe
Shenandoah County	Allow for Mixed Use Buildings	Short Term
	Consider Increasing Height Limits	Short Term
	Create a new Zoning District for Hamlets with reduced Lot Size Minimums	Medium Term
	Establish Transfer of Development Rights Program (TDR)	Long Term
	Expand Public Facilities Only Where Targeted	Long Term
Woodstock and other Towns	Create on-going education workshops and engagement opportunities to build trust and facilitate communication	Ongoing, begin Short Term
	Update Woodstock’s Zoning Ordinance	Short-to-Medium Term
	Establish/Participate in future Transfer of Development Rights Program (TDR)	Long Term

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Virginia Center for Housing Research

Summit Design and Engineering

Study Team

The Virginia General Assembly and Virginia Tech created the Virginia Center for Housing Research (VCHR) in 1989 to respond to the housing research needs of Virginia and the nation. In its more than 35-year performance record, VCHR has established an unparalleled reputation for providing high-quality housing-related research for localities, states, federal agencies, nonprofit organizations, and for-profit businesses, and is recognized throughout Appalachia as a leader in housing research, policy, and innovative technologies. Mel Jones, research scientist and associate director, directed the analysis in this report. Jones was supported in her work by Ainsley Raymond, a research assistant at the Center.

Summit Design and Engineering is a full-service design and engineering firm with planning services based in Richmond, Virginia. Summit's team of planners works with localities across Virginia and North Carolina on a wide range of planning, zoning, and multi-disciplined projects. Anne Darby (AICP), Michael Stapor (AICP), and Will Teeples (AICP) conducted the policy and infrastructure analysis in this report and developed recommendations for overcoming development constraints throughout Shenandoah County.

Study Geography

Shenandoah County comprises the towns of Woodstock, Strasburg, Toms Brook, Edinburg, Mount Jackson, and New Market; the census-designated places (CDPs) of Basye, Maurertown, and Mount Clifton; and numerous small villages and hamlets within the Northern Shenandoah Valley of Virginia. It is a rural community with a population of 44,630 situated approximately 90 miles west of Washington, D.C., between the cities of Harrisonburg and Winchester along Interstate 81. Known for its rich history, abundant outdoor recreational opportunities, and plentiful farmland, Shenandoah County is a popular destination for leisure travelers, with tourism serving as the county's second-largest industry behind agriculture.

With over 26% of Shenandoah County covered in national and state forests, in addition to Seven Bends State Park, the county is home to hundreds of miles of trails perfect for hiking, biking, and horseback riding. The Shenandoah River winds its way up the length of the county, offering opportunities for kayaking, fishing, tubing, and other activities on the water. Additionally, Bryce Resort in Basye offers four seasons of outdoor amenities including skiing, snow tubing, grass tubing, mountain biking, golfing, paddle boarding, and kayaking. Bryce Resort was recognized by Travel + Leisure Magazine as one of the best family-friendly mountain ski resorts in 2020 and has seen substantial growth since the pandemic. Agritourism is also a significant attraction within Shenandoah County, with 92% of land zoned agricultural or conservation. The county has the highest concentration of vineyards in the Shenandoah Valley,

as well as several craft breweries, distilleries, and cideries. Numerous farm stands and markets feature fresh produce, meats, flowers, and other agricultural products. Residents and visitors to the area compliment the small-town feel, warm hospitality, and sense of community found here.

The Town of Woodstock, the county seat, is nestled in the scenic Shenandoah Valley, adjacent to the North Fork of the Shenandoah River at Seven Bends State Park and surrounded by national forests. The landscape defines the community, with scenic mountain views and rolling agricultural hills. The natural environment surrounding Woodstock is heavily influenced by water and forests, providing residents and visitors with recreation, scenic vistas, and a connection to the outdoors.

The Town of Woodstock has a council-manager form of government with a mayor and a six-member town council, which appoints the town manager, town attorney, town clerk, treasurer, and chief of police. The Town Council in its legislative role adopts all ordinances and resolutions and establishes the general policies of the Town. The Council also sets the tax rate and adopts the budget.

Commissioned by both the County and the Town of Woodstock, this study covers the entire county and offers specific recommendations for the County, for Woodstock, and for the county's towns and hamlets more generally. Data is reported at the most detailed level that is reliable, meaning some metrics are reported at the town- and CDP-level while other metrics are reported at the county level. Due to the closely integrated nature of the county, this study intentionally analyzes each individual locality within the context of the wider market dynamics throughout Shenandoah County.

Data Sources and Methods

Data for this analysis was drawn from several sources, including:

- U.S. Census Bureau American Community Survey (ACS) published tables (2019–2023)
- HUD Consolidated Housing Affordability Strategy (CHAS) data (2017–2021)
- Lightcast Dataset, Occupation Table (Q2 2025), accessed via institutional subscription in July 2025
- CoStar Property data, accessed via institutional subscription in November 2025
- U.S. Census Bureau OnTheMap Application and LEHD Origin-Destination Employment Statistics (Q2 2023)
- Virginia Association of REALTORS real estate transaction data (through 2024)
- Shenandoah County foundation inspection data (1996-2025)

The study team analyzed ACS and CHAS data for reliability and only reported estimates with at least a 90% confidence level. Where ranges appear in the reporting, the population sample was too small to create a reliable estimate, so the margin of error was applied to provide a reliable range.

In addition to quantitative data analysis, the study team engaged local developers, real estate agents, lenders, short-term rental owners, community health professionals, schools, and local nonprofits and housing providers in focus groups. Anecdotes and insights from these conversations were used to contextualize the data and frame the recommendations included in this report.

Market Basics

Households and housing units are the subjects of this study. Households are interpreted using the U.S. Census definition: “A household consists of all the people who occupy a housing unit. A house, an apartment or other group of rooms, or a single room, is regarded as a housing unit when it is occupied or intended for occupancy as separate living quarters; that is, when the occupants do not live with any other persons in the structure and there is direct access from the outside or through a common hall”.¹ Housing units are interpreted more broadly as structures intended for residential use, and subgroups are defined based on the dataset.

This introductory section provides the most basic characteristics of the households and housing units in the county. Data is presented at the town- or place-level wherever reliable estimates are available. Additional characteristics of households and housing units are included in the remainder of the report.

Household Characteristics

There are 44,630 people living in 17,782 households within Shenandoah County. Households are concentrated within the towns of Strasburg and Woodstock, which contain 16% and 13% of the county’s population, respectively. These towns are also the only CDPs within the county to have seen statistically significant population increases since 2018, with a 9% increase in Strasburg and a 13% increase in Woodstock. In the same time period, Strasburg has seen a 12% increase in households, and Edinburg has seen a 34% increase in households, while no other town has seen a statistically significant change.

Population and Households

	<i>Population</i>	<i>Households</i>
Basye CDP	926 – 1,906	417 - 699
Edinburg	1,146 – 1,942	659
Maurertown CDP	808 – 1,468	242 - 426
Mount Clifton CDP	85 - 307	37 - 201
Mount Jackson	2,048	817
New Market	2,159	991
Strasburg	7,162	2,984
Toms Brook	220 - 522	93 - 185
Woodstock	5,851	2,228
Shenandoah County	44,630	17,782

Source: ACS 2023 (5-year estimates)

¹ U.S. Census Bureau Subject Definitions, <https://www.census.gov/programs-surveys/cps/technical-documentation/subject-definitions.html#household>, Accessed January 2026

Tenure

Of the households in Shenandoah County, 12,877 (72%) own their homes, and 4,905 (28%) are renters. The proportion of homeowners within the county is slightly higher than the statewide figure of 67% in Virginia.

Housing Units by Tenure

	Owner	% of Households	Renter	% of Households
Basye CDP	340 - 596	61 - 100	16 - 164	3 - 29
Edinburg	421	64	138 - 338	21 - 51
Maurertown CDP and Toms Brook	421	89	21 - 83	4 - 18
Mount Clifton CDP	33 - 195	28 - 100	0 - 14	0 - 12
Mount Jackson	551	67	197 - 335	24 - 41
New Market	293 - 519	30 - 52	414 - 756	42 - 76
Strasburg	2,120	71	864	29
Woodstock	1,027	46	1,201	54
Shenandoah County	12,877	72	4,905	28

Source: ACS 2023 (5-year estimates) Table B25003

Household Income

In Shenandoah County, renters tend to have lower incomes. Twenty-eight percent of renters have household incomes below \$25,000, compared to just 14% of homeowners. Sixty-one percent of renters have household incomes below \$50,000, compared to 31% of homeowners. While homeowner incomes are more evenly distributed, 35% have household incomes greater than \$100,000, compared to just 9-19% of renters who fall within this household income range.

Median Household Income by Tenure: Shenandoah County

Tenure	Median Household Income
Owner	\$76,115
Renter	\$44,490

Source: ACS 2023 (5-year estimates) Table B25119

Household Income by Tenure: Shenandoah County

(with % of total tenure)

	Less than \$25,000	\$25,000 to \$49,000	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 to \$149,999	\$150,000+
Own	1,821 14	2,153 17	2,415 19	1,980 15	2,340 18	2,168 17
Rent	1,365 28	1,606 33	641 13	1,293 26		

Source: ACS 2023 (5-year estimates) Table B25118

Householder Age

In Shenandoah County, renting householders tend to be a younger population, with up to 33% below the age of 35. Only up to 10% of homeowners fall within this age group. Among homeowners, householders tend to be older, with 60% above age 55 as compared to up to 42% of renters. Thirty-seven percent of homeowners and 23% of renters are above age 65 (for a total of 33% of all households in the county).

Householder Age by Tenure *(with % of total)*: Shenandoah County

	Total	15 to 34 yrs		35 to 44 yrs		45 to 54 yrs		55 to 64 yrs		65+ yrs	
<i>Own</i>	12,877	1,243	10	1,935	15	2,005	16	2,975	23	4,719	36
<i>Rent</i>	4,905	1,282	26	901	18	634 – 1,102	13 - 22	533 - 927	11 - 19	1,124	23
Total	17,782	2,525	14	2,836	16	2,873	16	5,785	33	5,843	33

Source: ACS 2023 (5-year estimates) Table B25007

Household incomes tend to increase as householders reach the height of their careers and then decline as householders reach retirement age. In Shenandoah County, one in five late-career householders (aged 45 to 64) has a household income above \$150,000, while just 7-12% of householders aged 65+ have household incomes in this range. Nearly one-third (32%) of households with householders aged 65+ have incomes below \$30,000, while 16% of householders aged 45 to 64 and 12-21% of householders aged 25 to 44 fall within this income range.

Household Income by Age: Shenandoah County

Householder Age	Total	Less than \$30,000	\$30,000 to \$49,999	\$50,000 to \$99,999	\$100,000 to \$149,999	\$150,000 or more
<45 years	5,361	725 – 1,253	992	1,976	573 – 1,039	445 - 751
45 - 64 years	6,578	1,025	552 – 1,074	2,077	1,332	1,331
65+ years	5,843	1,856	1,270	1,602	433 - 723	394 - 680

Source: ACS 2023 (5-year estimates) Table B19037

Housing Unit Characteristics

Shenandoah County contains 21,319 housing units. These units are dispersed throughout the county’s towns and unincorporated areas, with larger concentrations in Strasburg (3,296 units, or 15%) and in Woodstock (2,370 units, or 11%).

Housing Units

Place	Units
Basye CDP	1,523
Edinburg	703
Maurertown CDP and Toms Brook	553
Mount Clifton CDP	47 – 207
Mount Jackson	919
New Market	1,087
Strasburg	3,296
Woodstock	2,370
Shenandoah County	21,319

Source: ACS 2023 (5-year estimates)

Structure Type

Most of the county’s housing stock (76%) consists of single-family detached units. A small portion of the stock consists of units in multifamily structures (13%) and single-family attached units such as duplexes and townhouses (7%). Mobile or manufactured homes make up just 3-5% of the county’s housing units, though Mount Jackson contains a comparatively high proportion of mobile or manufactured homes (13-29% of units).

The towns of New Market, Woodstock, and Strasburg contain higher proportions of multifamily housing stock: at least 24%, 22%, and 21%, respectively. As the county’s three most populous CDPs, these towns can support denser housing options like multifamily structures, duplexes, and townhouses. These types of housing structures may serve as more affordable housing options for low-income families, young people early in their careers, and retired individuals looking to downsize, helping Shenandoah County better serve the needs of its families experiencing housing cost burden.

Housing Units by Structure Type (with % of Total)

	1-unit, detached		1-unit, attached		Multifamily, 2 or more units		Mobile home, Boat, RV, Van, etc.	
Basye CDP	1,131	74	79 - 321	5 - 21	53 - 263	4 - 17	2 - 66	0 - 4
Mount Jackson	584	64	0 - 42	0 - 5	69 - 175	7 - 19	119 - 267	13 - 29
New Market	431	40	95 - 353	9 - 32	260 - 514	24 - 47	6 - 84	1 - 8
Strasburg	1,784	54	353 - 669	11 - 20	701 – 1,301	21 - 39	-	-
Woodstock	1,292	55	207 - 421	9 - 18	517 - 963	22 - 41	0 - 84	0 - 4
Shenandoah County	16,173	76	1,517	7	2,757	13	654 – 1,090	3 - 5

Source: ACS 2023 (5-year estimates) Table B25136

Market Dynamics

This section characterizes housing market dynamics throughout Shenandoah County, including renter demand, homeowner demand, and workforce housing demand from both in- and out-commuters. Rental demand exists across the county, particularly in Strasburg, Woodstock, and New Market, which demonstrate low vacancy, positive absorption, and rapidly increasing rents. Similarly, homeowner demand exists across the county but is especially strong in Woodstock, Strasburg, New Market, and Maurertown, where homes sell quickly and vacancy rates are low.

Strong demand for housing in the county exists from workers employed in the Harrisonburg area or farther east in the D.C. metro area. Roughly two-thirds of working Shenandoah County residents commute outside the county for work, reflecting demand from households who work in the city but may prefer the prices, types, or rural character of the county's housing. Rents and homeowner costs in Shenandoah County remain significantly below those in the D.C. area and slightly below those in neighboring counties, drawing demand from workers seeking more affordable housing options, retirees looking to downsize, and residents of the metro area looking for a second home. Nearly half the workers employed in Shenandoah County commute in from surrounding areas, suggesting that while the county offers employment opportunities, its housing market may not meet the needs or preferences of all its workforce.

In addition to traditional residents, Shenandoah County sees housing demand from tourists, including both short-term rentals and seasonal or vacation residences, particularly near Bryce Resort in Basye.

Renter Demand

Strasburg, Woodstock, and New Market contain much of the county's rental activity. These towns contain the most rental units (total and multifamily) and have shown low rental vacancy rates and more positive absorption numbers in recent years compared to other towns in the county, indicating the strongest rental demand. Moreover, Maurertown has seen rapidly increasing rents as demand increases compared to other towns in the county, with median gross rent increasing 60% from 2018 to 2023 and median gross rent increasing 72% within the same time frame.

Mount Jackson and Edinburg contain moderate portions of the county's rental supply. Mount Jackson shows a high multifamily rental vacancy rate (6.22%, according to CoStar data) compared to other towns in the county. This rate, combined with a trend of neutral absorption

over recent years, indicates stagnant rental demand in Mount Jackson. Edinburg has a much lower multifamily rental vacancy rate (0.54%, according to CoStar data), which could indicate a stronger rental demand, though no data is available to assess trends in absorption. The other towns and CDPs in Shenandoah County contain too few rental units to produce reliable data for analysis.

While Strasburg, Woodstock, and New Market currently show the highest rental demand, this does not necessarily mean that they are the only suitable places for new rental development in the county. These places have existing rental stock and other advantages (i.e., infrastructure, services, and amenities) that make them attractive to renters; however, rental demand could expand or shift toward other towns and CDPs in the county if investments were made in developing the infrastructure, services, and amenities needed to support that demand.

Median Rent

In Shenandoah County, the median contract rent is \$816, and the median gross rent (which includes the contract rent and the additional monthly cost of utilities and fuels) is \$968. Median gross rents range from \$835 in Toms Brook to \$1,391 in Maurertown, and rents have grown fastest in Maurertown, Edinburg, and Woodstock in recent years. Notably, from 2018 to 2023, Maurertown saw a 60% increase in gross rent, which is over four times the increase for the entire county. Similarly, Maurertown saw a 72% increase in contract rent, nearly three times the increase for the entire county.

Median Rent by Place

	Gross Rent	% Change 2018-2023	Contract Rent	% Change 2018-2023
<i>Edinburg</i>	\$977		\$798	33%
<i>Maurertown CDP</i>	\$1,391	60%	\$1,109	72%
<i>Mount Jackson</i>	\$966	15%	\$772	20%
<i>New Market</i>	--		\$596	
<i>Strasburg</i>	\$997		\$879	13%
<i>Toms Brook</i>	\$835		\$670	
<i>Woodstock</i>	\$941	27%	\$800	28%
<i>Shenandoah County</i>	\$968	13%	\$816	24%

Source: ACS 2023 (5-year estimates), ACS 2018 (5-year estimates)

Vacancy

Rental vacancy rates are an indicator of varying rental demand across Shenandoah County’s towns and CDPs. Due to limitations in the data, precise estimates cannot be reported for the county or its towns. Ranges and estimates of rental vacancy rates are presented from multiple sources and are analyzed within the wider context of the county’s housing market.

The properties included in CoStar multifamily data capture only a portion of the full rental market, and should be interpreted as an indicator, not a complete assessment, of rental market trends. The table below compares the coverage of CoStar data compared to the total rental inventory reported by the American Community Survey.

CoStar Multifamily Rental Data Coverage by Place

	CoStar Multifamily Rental Units	ACS Rental Units	CoStar Coverage (%)
Basye	2	31 - 185	1 - 6
Edinburg	66	165 - 373	18 - 40
Maurertown	0	0 - 43	0
Mount Clifton	0	0 - 21	0
Mount Jackson	52	205 - 347	15 - 25
New Market	141	414 - 756	19 - 34
Strasburg	271	947	29
Toms Brook	20	8 - 60	33 - 100
Woodstock	504	1,250	40
Shenandoah County	1,056	5,151	21

Source: ACS 2023 (5-year estimates), CoStar multifamily data (accessed October 2025)

While precise vacancy rates are not available, the data reported by CoStar and the ACS indicate general trends in demand for rental units across Shenandoah County. Rental vacancy rates derived from both sources are reported in the table below alongside rankings of rental demand among the county’s most populated towns based on each data source.

Because ACS estimates are generated from a small sample size, each estimate is reported alongside a margin of error. When the margin of error is large, the estimate may not be accurate and must be reported as a reliable range. In Shenandoah County, there are not enough vacant rental units for the ACS to report reliable estimates, so rental vacancy ranges are reported in the table. Instead of an estimate scaled up from a small sample size, CoStar reports the exact data collected from all the properties it surveys (which are often verified in person). However, the properties surveyed by CoStar make up only a subset (21%) of the total rental

units in Shenandoah County. As shown in the table above, coverage is higher in more populated towns like Woodstock (40%) and Strasburg (29%). In towns with an unreliable ACS estimate of total rental units, a percentage of CoStar coverage is listed in the table, including 18-40% in Edinburg, 19-34% in New Market, and 15-25% in Mount Jackson.

Neither the ACS estimates nor the CoStar data are precise and complete reflections of rental vacancy in Shenandoah County, but they are useful indicators when analyzed together and within the larger context of the county's housing market.

Generally, a vacancy rate below 2% reflects a tight, competitive market where rents may increase quickly and lower-income households may be especially disadvantaged. A rate above 7% reflects a weak market with low rental demand. In both cases, rental property owners may be disincentivized to maintain and invest in existing stock (in a tight market, this is because renters may be willing to accept lower-quality units, and in a weak market, landlords may not see maintenance and upgrades as worthwhile investments).

According to ACS estimates, Shenandoah County has a rental vacancy rate of 2.26-7.77%, falling mostly within a healthy range. However, the CoStar vacancy rate, which is based on a subset of the county's rental units (typically professionally managed multifamily buildings), is 2.05%, indicating that the county's true rental vacancy rate may be on the lower end of the reliable ACS range. This would indicate a high-demand rental market in Shenandoah County, a conclusion which is consistent with the data showing multiple market gaps, high and growing demand coming from outside the county, and anecdotal characterizations of the market from local stakeholders.

In New Market, a vacancy rate range of 0-3.14% is derived from the ACS estimates, indicating a high-demand rental market with a need for more development. The CoStar vacancy rate of 2.04% aligns with this conclusion, indicating that among multifamily buildings specifically, New Market has a tight rental market bordering on an unhealthy vacancy rate that may begin to discourage investment.

For most towns within Shenandoah County, the rental vacancy rates derived from ACS estimates are too wide to usefully indicate rental market health². Toms Brook, Basye, Maurertown, Mount Clifton, and the county's other towns have too few rental units to construct ranges at all (i.e., the margins of error on the total rental unit estimates and the for-rent unit estimates are such that the constructed vacancy rate ranges would be 0-100%).

² Woodstock (0-10.66%), Mount Jackson (0-13.71%), Strasburg (0.81-18.4%), and Edinburg (0.3-44.2%) all have ACS vacancy ranges that are wider than the healthy range (2-7%).

For the places where ACS estimates cannot provide a useful vacancy rate range, the CoStar vacancy rate can be considered as an indicator of rental market health (though it is not a precise and complete vacancy rate for the entire rental market). According to CoStar, the lowest multifamily rental vacancy rates are in Strasburg (0.39%) and Edinburg (0.54%), with New Market (2.04%), Toms Brook (2.44%), and Woodstock (2.69%) close behind. These low rates in Strasburg and Edinburg indicate that these towns have especially high demand for multifamily rentals and have room to absorb additional development. New Market, Toms Brook, and Woodstock, with CoStar multifamily vacancy rates at the low end of a healthy range, also appear to have high demand and room in the market for more rental units. Mount Jackson’s rate of 6.22% is healthy, but on the higher end of the healthy range, indicating that demand may be weaker there than in some of Shenandoah County’s other towns.

Rental Vacancy Rate: Demand Strength Ranking

Rental Vacancy Rate ACS			Stabilized Rental Vacancy: Multifamily CoStar		
Demand Ranking	Place	Rental Vacancy Rate (%)	Demand Ranking	Place	Rental Vacancy Rate (%)
1	New Market	0 - 3.14	1	Strasburg	0.39
2	Woodstock	0 - 10.66	2	Edinburg	0.54
3	Mount Jackson	0 - 13.71	3	New Market	2.04
4	Strasburg	0.81 - 18.4	4	Toms Brook	2.44
5	Edinburg	0.3 - 44.2	5	Woodstock	2.69
-	Toms Brook	-	6	Mount Jackson	6.22
-	Basye	-	-	Basye	-
-	Maurertown	-	-	Maurertown	-
-	Mount Clifton	-	-	Mount Clifton	-
Shenandoah County		2.26 - 7.77	Shenandoah County		2.05

Source: ACS 2023 (5-year estimates) CoStar multifamily data (2025 Q1)

Unit Absorption

The unit absorption metric measures the net change in occupied rental units within a market over a given period. Positive absorption, meaning more units were rented than vacated, indicates increasing rental demand, while negative absorption indicates declining demand. In small localities, absorption values reported by CoStar may be only a few units per quarter, which can still represent meaningful shifts relative to the total rental inventory.

Multifamily Rental Unit Absorption: Demand Strength Ranking

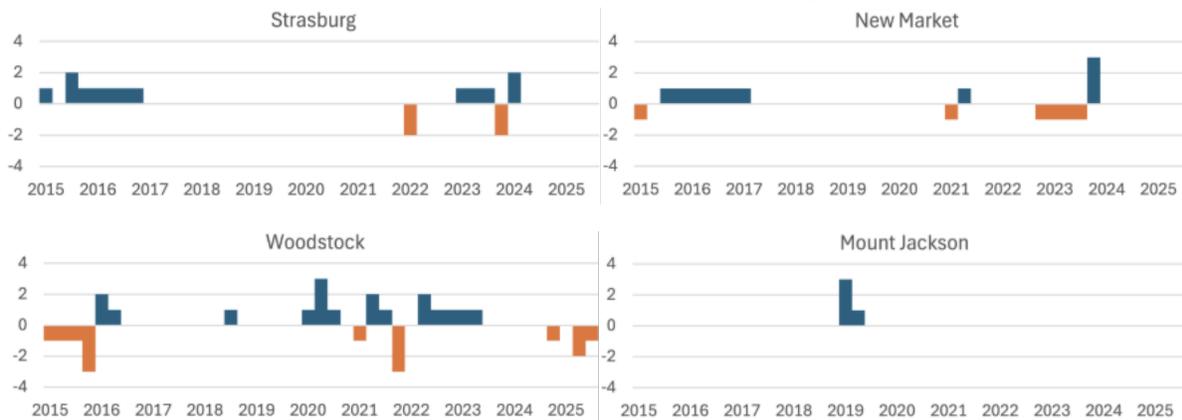
Demand Ranking	Place
1	Strasburg
2	New Market
3	Woodstock
4	Mount Jackson

Source: CoStar multifamily data (accessed October 2025)

Multifamily Rental Unit Absorption

Positive absorption is signified by blue bars

Negative absorption is signified by orange bars



Source: CoStar multifamily data (accessed October 2025)

Multifamily rental unit absorption data is only available for Strasburg, New Market, Woodstock, and Mount Jackson. None of these localities show large, consistent trends in absorption over time. However, Strasburg and New Market have shown the most positive absorption over recent years, while Woodstock has shown neutral and negative absorption in 2024 and 2025 after a period of positive absorption from 2020 through 2023. This recent shift in Woodstock could represent a short-term softening in the market rather than a permanent shift in demand. Mount Jackson has shown neutral absorption over recent years.

Homeowner Demand

Homeowner vacancy rates and home sale trends suggest that the strongest homebuyer demand in Shenandoah County is currently concentrated in Strasburg, New Market, Maurertown, and Woodstock, where vacancy rates are low and homes sell quickly. As competitive ownership markets, these towns could be suitable for additional development where infrastructure and lots are available. In Edinburg and Mount Jackson, homes sell less quickly, but low homeownership vacancy rates indicate that these markets have room to absorb additional units as well.³

While these towns show the highest demand right now, current demand patterns reflect existing infrastructure, regulations, amenities, and market accessibility. Investments targeting other towns across the county to develop the infrastructure, amenities, and services that make the county’s higher-demand areas attractive to buyers could expand or shift homebuyer demand beyond where it is currently concentrated.

Median Homeowner Costs

Median Monthly Homeowner Costs by Place

	<i>W/ Mortgage</i>	<i>% Change 2018-2023</i>	<i>W/out Mortgage</i>	<i>% Change 2018-2023</i>
<i>Basye CDP</i>	\$1,478	22%	--	
<i>Edinburg</i>	\$1,357	19%	\$448	
<i>Maurertown CDP</i>	\$1,624		--	
<i>Mount Jackson</i>	\$1,292		--	
<i>Strasburg</i>	\$1,433		\$486	33%
<i>Toms Brook</i>	\$1,257		--	
<i>Woodstock</i>	\$1,397		\$454	
<i>Shenandoah County</i>	\$1,462	8%	\$447	16%

Source: ACS 2023 (5-year estimates), ACS 2018 (5-year estimates)

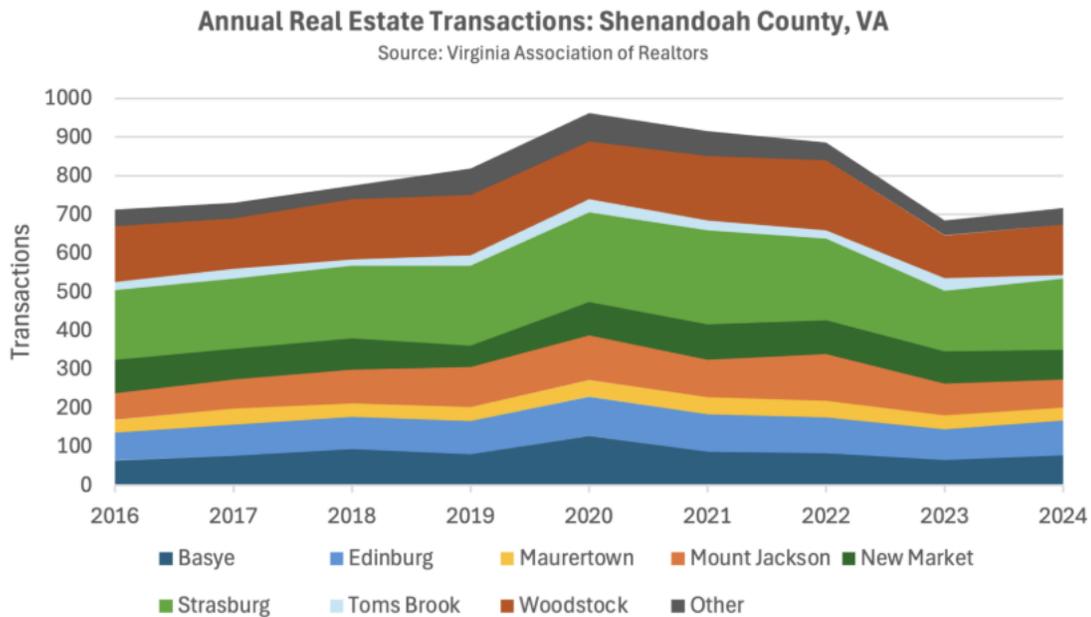
In Shenandoah County, the median monthly cost for homeowners with mortgages was \$1,462, which represents an 8% increase from 2023. For homeowners who own their homes free and

³ The homeowner vacancy rates in Mount Jackson and Edinburg are <2.4% and <3.1%, respectively.,

clear, the median monthly cost (taxes, insurance, and utilities) was \$447, representing a 16% increase from 2023. Median costs for homeowners with mortgages range from \$1,257 in Toms Brook to \$1,624 in Maurertown, while median costs for homeowners without mortgages are more uniform across the county, ranging from \$448 in Edinburg to \$486 in Strasburg.

Home Sale Trends

The bulk of the county’s home sales have consistently been in Strasburg and Woodstock, with New Market, Mount Jackson, and Edinburg seeing moderate home sale numbers as well.



Days on the market (DOM) is an important indicator of homebuyer demand. DOM measures the number of days that a listing is active before an offer is accepted. A low DOM value (under 30 days) indicates a high-demand “seller’s market,” while a high DOM value (greater than 60 days) indicates a market with low demand. The median, the middle value, is an important measure because it is not influenced by a small number of niche properties (e.g., farms and other high-dollar properties or homes in extreme disrepair) that may take a long time to sell because the buyer pool is smaller.

Strasburg, Maurertown, and New Market show the lowest DOM numbers in recent months at 10, 10.5, and 11 days, respectively, in 2025 (including sales through July), indicating strong demand and a highly competitive market for buyers. Basye, Woodstock, and Toms Brook also reflect low DOM, indicating similarly high levels of demand from homebuyers.

Mount Jackson and Edinburg show the highest DOM numbers in recent months at 27 days and 39 days, respectively. While these numbers are high compared to the rest of the county, which

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indicates less demand from homebuyers, they represent a more balanced market where homeowners can expect to sell a home in a reasonable amount of time and buyers do not feel overwhelmed by the speed and competitiveness of market transactions.

Median Days on the Market

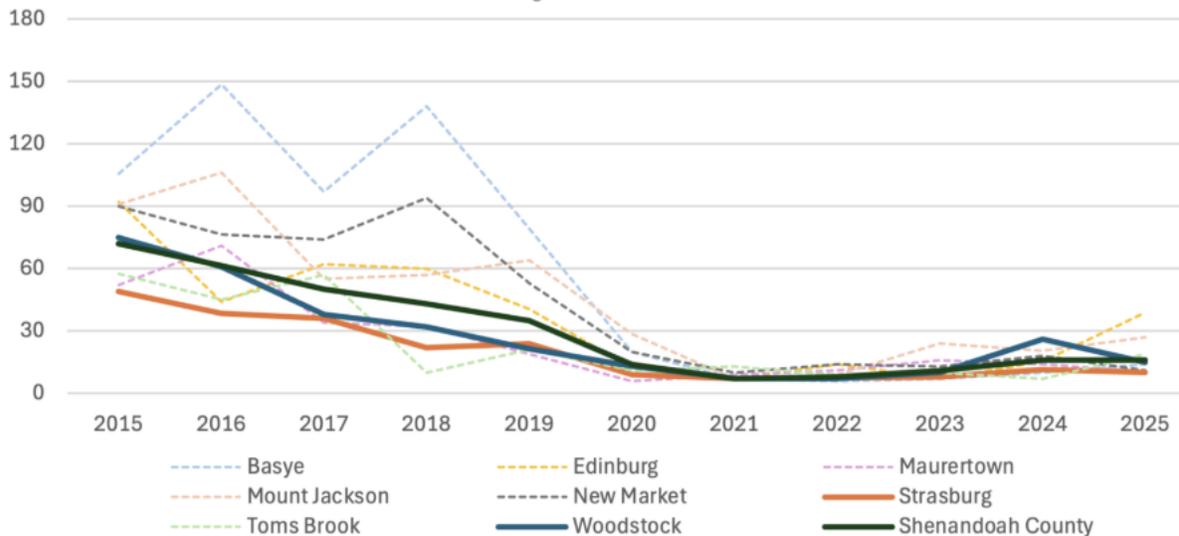
Ranking		2024	2025
		<i>Includes sales through 7/31</i>	
1	Strasburg	11.5	10
2	Maurertown	14	10.5
3	New Market	18	11
4	Basye	10	14
5	Woodstock	26	15
6	Toms Brook	7	19
7	Mount Jackson	20.5	27
8	Edinburg	15.5	39
Shenandoah County		16	16

Source: Virginia Association of REALTORS

From 2018 through 2020, the entire county saw a dramatic decrease in annual median DOM values before reaching a sustained low period through 2023. While this low period in the years following the COVID-19 pandemic is consistent with nationwide trends, the county's decrease in annual median DOM in the years prior is not, indicating a unique preexisting homebuyer demand in Shenandoah County.

Annual Median Days on the Market

Source: Virginia Association of Realtors



Workforce Demand

Shenandoah County is integrated into a broader regional labor and housing market, with significant commuting flows both into and out of the county. Roughly two-thirds of Shenandoah County residents commute elsewhere for work, primarily to nearby counties like Frederick, Warren, and Rockingham, or farther east to the D.C. metro area, including Fairfax, Loudoun, and Prince William counties. These patterns reflect the county's relatively lower housing costs, which remain significantly below those in the D.C. area and slightly below those in neighboring counties, and are evidence of potential demand from households who live and work in other markets but would like to live in Shenandoah County.

Nearly half the workers employed in Shenandoah County commute in from surrounding areas, suggesting that while the county offers employment opportunities, its housing market may not meet the needs or preferences of all its workforce. Occupation and income data show that out-commuters may tend to hold higher-paying jobs than in-commuters, reinforcing the idea that Shenandoah serves as a more affordable residential base for higher-income workers employed elsewhere.

Out-Commuters

Commuting patterns in Shenandoah County reflect its connectivity to multiple regional employment hubs via I-81. Towns at the southern end of the county, like New Market and Mount Jackson, have residents who commute south into Rockingham County and Harrisonburg and residents who commute north into Frederick County, Winchester, and the D.C. metro area (specifically Fairfax and Loudoun counties). Edinburg and Woodstock, in the county's center, show similar patterns, with residents commuting both north toward the D.C. metro area and south toward Harrisonburg. At the northern end, Maurertown, Toms Brook, and Strasburg function as bedroom communities for workers employed in the Winchester area as well as in Warren, Loudoun, Prince William, and Fairfax counties, with minimal commuting south toward Harrisonburg. Basye, while farther from the interstate, attracts housing demand through tourism as a resort community, and, recently, through remote work, as local stakeholders have observed an increasing pattern of residents from Northern Virginia moving into former second homes or "vacation" homes. Overall, Shenandoah County experiences consistent housing demand from two major commuting populations: higher-income workers employed in the Winchester area and the D.C. metro area, whose demand extends across the entire county, and workers from the Harrisonburg area, whose demand is concentrated in the southern end of the county.

In-Commuters

The county sees 5,951 in-commuters, most traveling 40–90 minutes daily. Many of these workers are employed in blue-collar and service-sector jobs (e.g., machine operators, food processing workers, maintenance technicians) or in K-12 education. Typical median household incomes for in-commuter positions range from \$30,000–\$50,000 for single-earners. (Dual-earner households may reach \$60,000–\$100,000.) A small group of white-collar professionals with higher incomes also commute into the county from nearby regions.

The counties where most in-commuters currently live (Rockingham County, Frederick County, Harrisonburg City, and Page County) have median housing costs that are similar to Shenandoah’s but have increased more rapidly in recent years. Offering more affordable housing options near employment centers in Shenandoah could persuade some of these commuters to relocate, especially if these new rental and for-sale options meet their preferences and needs or are subsidized to meet the budgets of very- and extremely low-income households. If more affordable units of all types are developed, some in-commuter households may move into the county, either filling new developments or filling the vacant units of previous residents who move into the new developments.

Across Shenandoah County’s towns and CDPs, a consistent pattern emerges: a high degree of workforce mismatch. In towns like Woodstock, Edinburg, Mount Jackson, and Strasburg, the vast majority of residents commute out for work, while most local jobs are filled by in-commuters. This dynamic is driven by a mix of factors, including housing affordability, availability, and preferences for housing type or location. While some towns show slightly higher housing costs or faster growth in rents, the differences are not always large enough to fully explain commuting patterns. Instead, decisions may be influenced by job opportunities, family and household needs, and lifestyle preferences. In most of these towns, in-commuter occupations tend to be lower-wage service or production roles, while out-commuters are more likely to be employed in higher-paying professional or managerial positions.

Shenandoah County’s towns, villages, and hamlets largely exist along the I-81 corridor. The largest share of out-commuters in Woodstock and villages/hamlets to the southwest (Edinburg, Mount Jackson, New Market) commute to Fairfax County. In New Market and Mount Jackson, Rockingham County is the second-most-prominent destination. Frederick County is the second-most-prominent destination for residents of Edinburg and Woodstock and the most prominent destination for villages/hamlets to the northeast (Toms Brook and Strasburg).

Commuting is primarily to the northeast, with Fairfax County and Frederick County (and Winchester) as important destinations across the county. Strasburg, Toms Brook, and New Market have the largest share of out-commuters, likely due to their close proximity to

neighboring jurisdictions. Mount Jackson and Edinburg have the smallest shares of residents who commute out of the county, followed by Woodstock.

Countywide Commuting Patterns

Shenandoah County is part of a greater labor and housing market that includes the City of Harrisonburg, Loudoun County, Page County, Prince William County, Rockingham County, Fairfax County, Warren County, and the City of Winchester.

There are 18,362 workers who live in Shenandoah County. Of these workers, 12,022, or approximately 2 in 3, commute outside the county for work. Many commute to Frederick County (8.7% of workers living in Shenandoah County), the City of Winchester (7.6%), Fairfax County (8.2%), Warren County (5.9%), and Loudoun County (4.7%). Out-commuters tend to either work in the immediately adjacent counties of Frederick, Warren, and Rockingham or travel east to work in the D.C.-area counties of Fairfax, Loudoun, and Prince William. These two clusters give insight into the types of workers and families who find housing options in Shenandoah County more affordable, available, or preferable than those in the localities they commute to.

Out-Commute Shed Median Housing Costs (with % change 2018-2023)

	Median Owner Costs				Median Rent			
	with Mortgage	% change	w/out Mortgage	% change	Gross Rent	% change	Contract Rent	% change
<i>Shenandoah County</i>	\$1,462	8	\$447	16	\$968	13	\$816	24
<i>Warren County</i>	\$1,808	22	\$491	33	\$1,199	25	\$1,007	28
<i>Rockingham County</i>	\$1,592	20	\$454	21	\$1,125	31	\$895	28
<i>Frederick County</i>	\$1,838	18	\$526	23	\$1,402	25	\$1,189	32
<i>Prince William County</i>	\$2,668	19	\$787	20	\$,002	20	\$1,828	26
<i>Loudoun County</i>	\$3,228	18	\$901	18	\$,317	28	\$2,111	28
<i>Fairfax County</i>	\$3,164	19	\$1,046	24	\$2,230	20	\$2,078	20
<i>Winchester City</i>	\$1,754	19	\$553	12	\$1,298	28	\$1,090	30

Source 1. ACS 2023 (5 YR Estimates), ACS 2018 (5 YR Estimates), Table B25088, B25064, B25058

Median rent and homeowner costs are significantly lower in Shenandoah County than in the D.C.-area counties of Prince William, Loudoun, and Fairfax, where many Shenandoah County

residents commute to work. Compared to Loudoun and Fairfax counties, median rent and homeowner costs in Shenandoah County are less than half. Additionally, housing costs in the D.C. area have increased more rapidly over recent years than those in Shenandoah. Families who commute to the D.C. area for work may prefer Shenandoah for its rural and small-town lifestyle and its comparatively affordable housing options.

The other out-commuter destinations tend to be immediately outside the county. While median rent and homeowner costs are more similar to those in Shenandoah than costs in the D.C. area, Shenandoah’s median costs are still slightly lower than Warren, Rockingham, and Frederick counties. Additionally, housing costs in these counties have increased more rapidly over recent years than those in Shenandoah County. For these reasons, some out-commuters may find Shenandoah’s market slightly more affordable or attainable. However, some commuters may prefer to live in the county for other reasons, including a spouse’s job, a child’s school, or the specific type, size, and style of available housing options.

There are 12,296 workers employed inside Shenandoah County. Of them, 48.4% commute into the county from outside. Many of these in-commuters live in the immediately surrounding counties, like Rockingham (8.8% of workers), Frederick (5.0%), Page (3.9%), and Warren (3.0%), as well as the City of Harrisonburg (2.7%). While many people who live in Shenandoah County commute to the D.C. area for work, the inverse relationship is not prominent.

In-Commute Shed Median Housing Costs (with % change 2018-2023)

	<i>Median Owner Costs</i>				<i>Median Rent</i>			
	<i>with Mortgage</i>		<i>w/out Mortgage</i>		<i>Gross Rent</i>		<i>Contract Rent</i>	
<i>Shenandoah County</i>	\$1,462	8	\$447	16	\$968	13	\$816	24
<i>Rockingham County</i>	\$1,592	20	\$454	21	\$1,125	31	\$895	28
<i>Frederick County</i>	\$1,838	18	\$526	23	\$1,402	25	\$1,189	32
<i>Harrisonburg City</i>	\$1,495	20	\$495	27	\$1,120	28	\$963	28
<i>Page County</i>	\$1,396	19	\$456	20	\$851	--	\$616	15
<i>Warren County</i>	\$1,808	22	\$491	33	\$1,199	25	\$1,007	28

Source: ACS 2023 (5 YR Estimates), ACS 2018 (5 YR Estimates), Tables B25088, B25064, B25058

In Page County, median rent and homeowner costs (without mortgage) are lower than those within Shenandoah County. In Rockingham County and Harrisonburg, median costs are more similar. In Frederick County, median costs are significantly higher. In Rockingham County, Frederick County, and Harrisonburg, housing costs have increased more rapidly over recent years than those in Shenandoah. Commuters may prefer to live in these counties for reasons

SHENANDOAH COUNTY & TOWN OF WOODSTOCK HOUSING STUDY 2025

unrelated to housing costs, including a spouse’s job, a child’s school, or a preference for the type, style, or size of available housing.

For comparison here and in town-specific sections, see the following table of housing costs within Shenandoah County’s towns and CDPs.

Shenandoah County Towns and CDPs Median Housing Costs (with % change 2018-2023)

	Median Owner Costs			Median Rent		
	with Mortgage		w/out Mortgage	Gross Rent		Contract Rent
<i>Basye CDP</i>	\$1,478	22	--	--	--	--
<i>Edinburg</i>	\$1,357	19	\$448	\$977		\$798 33
<i>Maurertown CDP</i>	\$1,624		--	\$1,391	60	\$1,109 72
<i>Mount Clifton CDP</i>			--	--		--
<i>Mount Jackson</i>	\$1,292		--	\$966	15	\$772 20
<i>New Market</i>			--	--		\$596
<i>Strasburg</i>	\$1,433		\$486 33	\$997		\$879 13
<i>Toms Brook</i>	\$1,257		--	\$835		\$670
<i>Woodstock</i>	\$1,397		\$454	\$941	27	\$800 28

Source: ACS 2023 (5 YR Estimates), ACS 2018 (5 YR Estimates), Tables B25088, B25064, B25058

Top 10 In- and Out-Commuter Occupations and Incomes

In-Commuters			Out-Commuters		
Occupation (Num. Commuters)		Median Income	Occupation (Num. Commuters)		Median Income
Meat, Poultry, and Fish	99	\$38,753	Retail Salespersons	281	\$31,978
Production Workers	31	\$35,061	General Managers	205	\$88,975
Food Processing	20	\$35,852	Registered Nurses	182	\$85,058
Electronics Engineers	20	\$139,002	Fast Food	162	\$25,695
Special Education Teachers	15	\$65,806	Laborers and Movers	149	\$35,992
Radio, Cellular, and Tower	14	\$51,605	Software Developers	147	\$140,616
Paper Goods	14	\$56,714	Waiters	144	\$30,917
Highway Maintenance	14	\$51,589	Business Operations Specialists	138	\$61,167
Butchers	14	\$33,309	Stockers and Fillers	137	\$36,194
Special Education Teachers, Preschool	11	\$52,277	Management Analysts	134	\$103,126

Source: Lightcast Occupation Table, Q2 2025 Dataset

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The occupations of workers who commute into Shenandoah County tend to have lower annual incomes than those who commute out of Shenandoah for work. Of the 10 most employed in-commuter occupations, two have median incomes above \$57,000. For the 10 most employed out-commuter occupations, five have median incomes over this value.

Shenandoah County Commuters by Destination

Workplace Destination: Workers Living in Shenandoah				Home Destination: Workers Working in Shenandoah			
Destination: Counties	Count	Share	Commute Time	Destination: Counties	Count	Share	Commute Time
Shenandoah	6,340	34.5%		Shenandoah	6,340	51.6%	
Frederick	1,595	8.7%	50	Rockingham	1,076	8.8%	40
Fairfax	1,510	8.2%	90	Frederick	611	5.0%	50
Winchester city	1,392	7.6%	40	Page	481	3.9%	30
Warren	1,076	5.9%	40	Warren	365	3.0%	40
Loudoun	866	4.7%	80	Harrisonburg city	330	2.7%	30
Rockingham	607	3.3%	40	Loudoun	245	2.0%	80
Prince William	589	3.2%	60	Berkeley County, WV	183	1.5%	70
Henrico	272	1.5%	160	Winchester city	172	1.4%	40
Harrisonburg city	264	1.4%	30	Augusta	150	1.2%	70
All Other Locations	3,851	21.0%		All Other Locations	2,343	19.1%	
Destination: Places	Count	Share	Commute Time	Destination: Places	Count	Share	Commute Time
Woodstock town	2,372	12.9%		Woodstock town	921	7.5%	
Winchester city	1,392	7.6%	40	Strasburg town	588	4.8%	
Mount Jackson town	704	3.8%		Mount Jackson town	376	3.1%	
Strasburg town	634	3.5%		Harrisonburg city	330	2.7%	30
Columbia Furnace CDP	577	3.1%		Edinburg town	265	2.2%	
Front Royal town	497	2.7%	30	New Market town	255	2.1%	
Edinburg town	333	1.8%		Basye CDP	203	1.7%	
Harrisonburg city	264	1.4%	30	Winchester city	172	1.4%	40
New Market town	243	1.3%		Front Royal town	151	1.2%	
Chantilly CDP	239	1.3%	70	Timberville town	147	1.2%	20
All Other Locations	11,107	60.5%		All Other Locations	8,888	72.3%	

Source: U.S. Census Bureau, "OnTheMap," accessed August 2025.

Woodstock Commuting Patterns

Woodstock is part of a larger commute shed that includes other Shenandoah County towns, some counties immediately surrounding Shenandoah, and some counties in the D.C. area.

There are 2,338 workers who live in Woodstock. Of these, 1,872 (80%) commute outside the town for work. Many travel to Fairfax County (9.1%), Frederick County (7.2%), and Winchester City (6.8%) for work. Generally, commuters either work in Shenandoah County (39.4%), in the neighboring Frederick, Warren, or Rockingham counties, or in the D.C.-area counties of Fairfax, Loudoun, or Prince William. Of those commuters who work elsewhere within Shenandoah County, many work in the census-designated place Columbia Furnace (7.2% of all commuters) or Mount Jackson (2.6%).

There are 4,143 workers employed within Woodstock. Of these, 3,677 (89%) live outside the town and commute in for work. Most of these workers commute from elsewhere in Shenandoah County, while others commute from nearby Frederick County (6.1%), Rockingham County (5.5%), Warren County (3.6%), Page County (2.8%), and Harrisonburg (2.2%). Of those who commute from within Shenandoah, many live in Strasburg (5.3%), Edinburg (2.3%), or Mount Jackson (2.2%).

There is a mismatch between the workforce living within Woodstock and the jobs within the town. Eighty percent of workers living in the town commute outside it for work, and 89% of workers employed within Woodstock commute in from out of town. The top 10 out-commuter occupations by employment (which include software developers, management analysts, general and project managers, and accountants) generally have higher median salaries than the top 10 in-commuter occupations (which include cashiers, food service workers, and teaching assistants). This pattern could indicate that some workers employed within Woodstock cannot find affordable housing options within the town, and some workers employed outside Woodstock prefer the size, style, type, or price of housing and the lifestyle within the town.

Top 10 In- and Out-Commuter Occupations and Incomes

In-Commuters			Out-Commuters		
Occupation (Num. Commuters)	Median Income		Occupation (Num. Commuters)	Median Income	
Cashiers	114	\$28,788	Laborers and Movers	43	\$35,958
Nursing Assistants	88	\$37,510	Home Health Aides	36	\$29,244
Fast Food and Counter Workers	57	\$25,693	Software Developers	30	\$140,539
Registered Nurses	47	\$85,104	Management Analysts	23	\$107,150
Stockers and Order Fillers	27	\$36,201	General and Operations Managers	21	\$88,950
Teaching Assistants, K-12	27	\$27,455	Heavy Truck Drivers	21	\$49,856
Secondary School Teachers	25	\$54,011	Accountants, Auditors	20	\$75,443
Elementary School Teachers	25	\$53,734	Maintenance Workers	18	\$42,964
Retail Supervisors	25	\$45,139	Shipping, Inventory Clerks	17	\$39,458
Licensed Nurses	22	\$62,898	Project Management Specialists	17	\$89,007

Source: Lightcast Occupation Table, Q2 2025 Dataset

Market Gaps

This section highlights market gaps that the county should address to allow all residents to secure housing that meets their needs, budgets, and preferences. These needs include affordable units (with specific consideration of affordability for the county’s workers), small (one- to two-bedroom) units for small and aging households looking to downsize within the community, and new and upgraded units to introduce high-quality new construction into the county’s aging housing stock.

Workforce Units

In Shenandoah County, most households (68%) include at least one working individual: 35% include one worker, and 33% include two or more workers. This pattern is consistent within the town of Strasburg, where 32% of households include one worker and 37% include two or more. In Woodstock, there is an especially high proportion of households with one worker (45%), which could represent aging and retiring couples, young individuals living alone, and young families—with each group having unique housing needs.

Many of the 5,625 households (32%) within the county that contain no workers are likely to be retired. In Shenandoah County, 5,843 households are led by a householder aged 65+. There are 4,956 households (28%) who receive retirement income and 7,224 households (41%) who receive Social Security income, and 1,086 households (6%) who receive Supplemental Security Income.

Households by Number of Workers: Shenandoah County

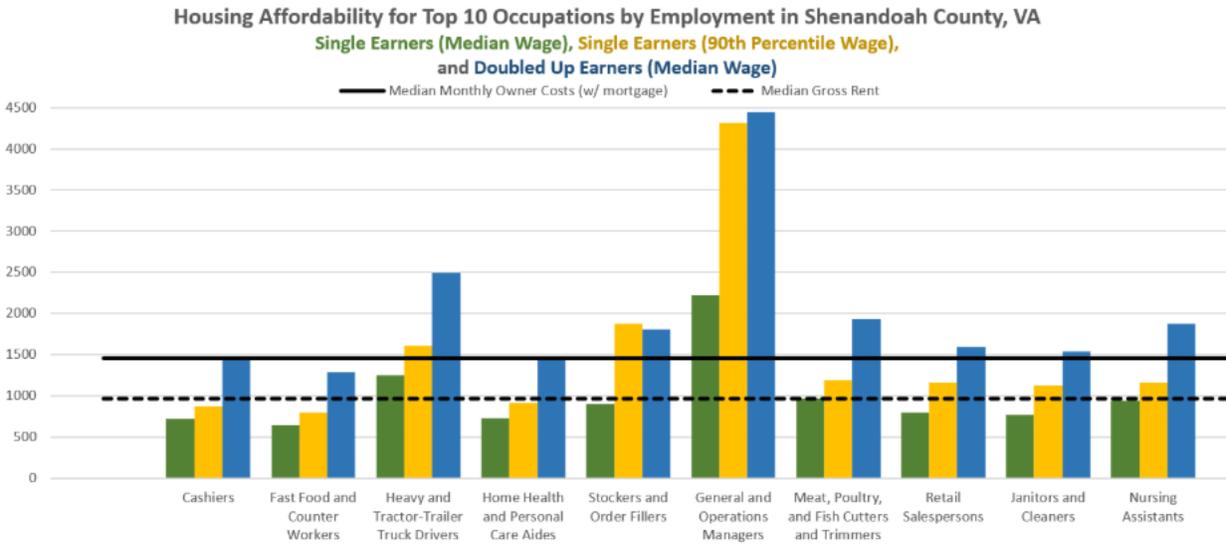
Number of workers	Households	%
No workers	5,625	32
1 worker	6,250	35
2 or more workers	5,907	33

Source: ACS 2023 (5-year estimates) Table B08202

To better understand whether the existing housing stock meets the needs of working households in Shenandoah County, the maximum affordable housing costs for the top 10 most employed occupations in the county are compared with median housing costs. Each occupation is considered in three scenarios: a single-earner earning median wage for that occupation; dual earners, both earning median wage; and a single-earner earning 90th-percentile wage. These scenarios capture a range of realistic household configurations, as most households within the county contain one to two workers.

In Shenandoah County, median-wage workers in eight of the 10 most employed occupations cannot reasonably afford median gross rent within the county. Even when paired with a secondary median-wage earner, workers in three of these occupations cannot afford median rent without becoming burdened by housing costs. At 90th-percentile wages, workers in all 10 of these occupations would be able to afford the median rent.

Similarly, median-wage workers in nine of the 10 most employed occupations cannot reasonably afford median monthly homeowner costs (with mortgage). Even with a secondary median-wage earner, households in seven of these occupations cannot reasonably attain homeownership at these costs. At 90th-percentile wages, median monthly owner costs become more affordable for some of these occupations, but workers in five of them would be just below or above the housing cost-burden threshold. For a significant portion of the county’s workforce, homeownership is not a comfortably attainable option.



Affordable Units

Over one quarter (26%) of households in Shenandoah County are housing cost-burdened, meaning they spend greater than 30% of their income on housing costs. When a family is housing cost-burdened, they may compromise on necessities such as food, healthcare, transportation, and education in order to pay for housing. In the county, 2,242 (13%) of these households are severely housing cost-burdened, meaning they spend over half their income on housing costs. These households may forgo necessities to pay for housing and may be at risk of homelessness if they encounter an emergency expense or other sudden economic hardship. Families across the county require more affordable rental and for-sale housing options.

Housing cost burden is slightly more common among renters. There are 1,683 renting households (34%) who are housing cost-burdened, and at least 641 (13-22%) renting households are severely cost-burdened. Many of these households are located in the towns of Woodstock (289 to 695 households), Strasburg (169 to 503 households), and New Market (129 to 279 households), indicating that these areas specifically require more deeply affordable rental options.

In Shenandoah County, 22% of homeowners (2,891 households) are housing cost-burdened. Of these, 1,372 households (11% of homeowners) are severely housing cost-burdened. When homeowners first buy their homes, the mortgage finance system generally prevents them from being cost-burdened. Additionally, homeowners generally face less volatility in housing costs compared to renters. Therefore, when homeowners become cost-burdened, it is often a result of economic hardship such as job loss, death of a family member, or incomes not keeping up with rising taxes, insurance costs, and utility costs. Even if they own their homes free and clear,

cost-burdened homeowners may compromise on necessities to make mortgage payments. Deferred maintenance and forgone upgrades can lead to safety and well-being concerns for the household as well as potential dilapidation of the community’s housing stock. Many of these cost-burdened homeowners live in the towns of Woodstock and Strasburg, indicating the need for more deeply affordable for-sale housing options within these towns and across the county. Additionally, weatherization and subsidized home repair programs can further reduce housing costs, easing the burden on these families and keeping the county’s housing stock well maintained.

In Shenandoah County, most housing cost-burdened families (both renters and homeowners) are very low or extremely low income. The county is primarily made up of one- and two-person households; for single-person households, the HUD-designated threshold for a very low income in Shenandoah County is \$28,200 and for an extremely low income is \$16,950. For two-person households, the thresholds are \$32,200 and \$19,720, respectively. There is an urgent need for more affordable housing options throughout the county that are priced to reasonably fit within these families’ budgets (i.e., priced at or below 30% of their household incomes).

HUD Designated Low Income Limits: Shenandoah County

		<i>1-person household</i>	<i>2-person household</i>
Extremely Low Income	30% of AMI	\$16,950	\$19,720
Very Low Income	50% of AMI	\$28,200	\$32,200
Low Income	80% of AMI	\$45,100	\$51,550

Source: U.S. Department of Housing and Urban Development Section 8 Income Limits FY23

Cost Burdened Households by Income: Shenandoah County

	<i>Owner</i>		<i>Renter</i>	
	<i>Cost burdened</i>	<i>Severely cost burdened</i>	<i>Cost burdened</i>	<i>Severely cost burdened</i>
<50% AMI	1,480	1,100	1,083	464 - 814
50-100% AMI	918	22 - 154	384 – 816	0 - 151
>100% AMI	208 - 472	0 - 84	0 - 89	0 - 63

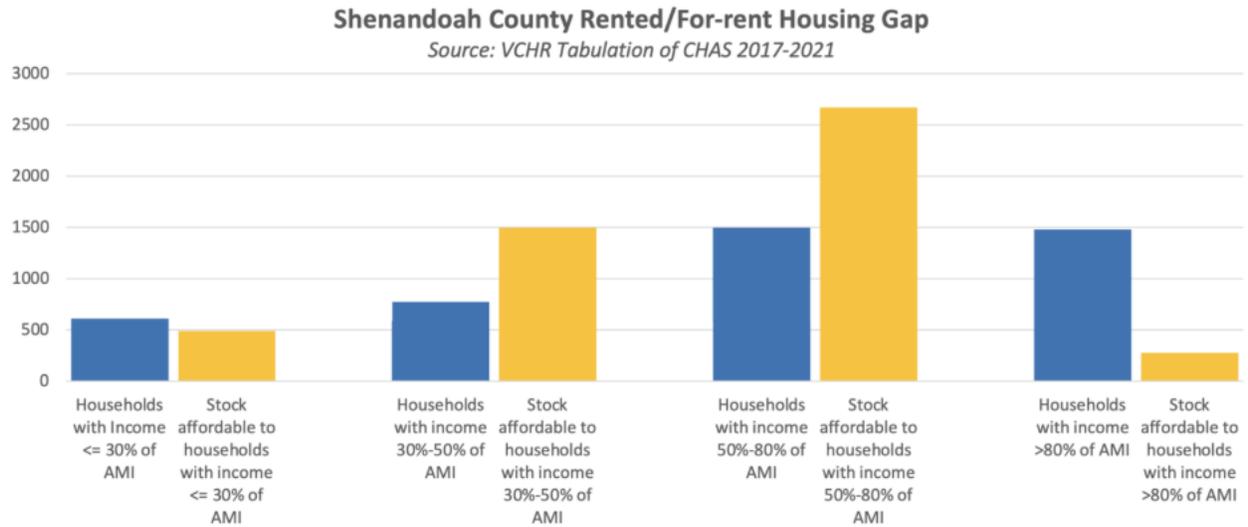
Source: CHAS 2017-2021 Table 7

Affordability Gap Analysis

This section analyzes the gaps between household incomes and housing affordability in Shenandoah County. In order for a housing unit to be affordable for a household at a given income level, its monthly costs (i.e., mortgage payment, utilities) must amount to less than 30% of the household’s monthly income. Comparing the number of housing units at each

affordability level to the number of households at each corresponding income level is a useful way to understand gaps in the housing stock that may exist at specific price points.

Renters



Shenandoah County does not contain enough rental units that are affordable for households earning less than 30% of the Area Median Income (AMI). Over half (an estimated 72%) of the units priced for this income group are occupied by higher-income households, reducing availability for those with the greatest need. With this lack of affordable units, many extremely low-income households are forced to rent units above their affordability range. Up to 20% of units priced for households earning 30–50% of AMI are occupied by renters with incomes below 30% of AMI, classifying these households as housing cost-burdened and underscoring the lack of truly affordable options for the region’s lowest-income households.

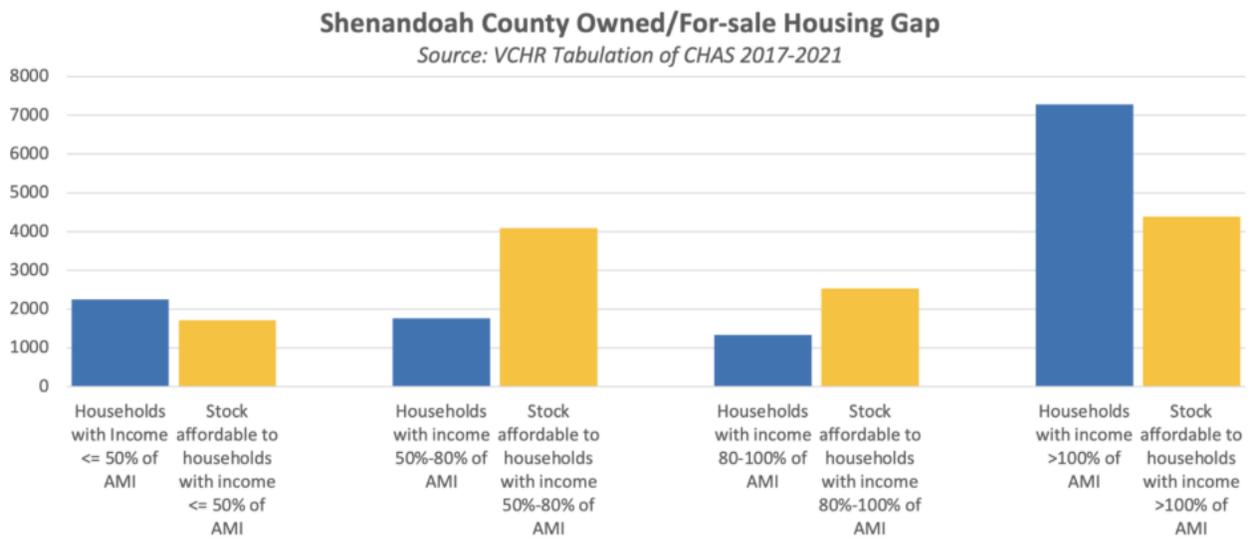
Additionally, there is a mismatch between the number of households earning above 80% of AMI and the limited supply of rental housing priced to serve them. The county contains just 195 to 363 rental units priced to serve the 1,480 renters in this income range. More than 1,100 of these higher-income households rent lower-cost units, adding to competition in an already strained segment of the market. While some of these households may prefer less expensive housing, others might “trade up” if higher-priced rental or homeownership opportunities that better aligned with their preferences and needs became available.

Much of the region’s rental housing (54%) is priced within the affordability range for households earning 50–80% of AMI. However, the lack of supply on either end of the income spectrum (specifically for those earning below 30% and above 80% of AMI) concentrates both lower- and higher-income renters in this middle affordability band. According to local stakeholders, strict credit score requirements and large deposits (sometimes double or four

times the monthly rent) can prohibit lower-income households from initially securing an apartment that they may be able to afford. Higher-income households, including workers who commute to Winchester and the D.C. area, are better positioned to secure available units, often by paying higher rents, making larger deposits, or meeting stricter screening criteria. This economic advantage allows them to outcompete lower-income households, who are then left with fewer options. As a result, low-income renters are frequently forced to choose between more expensive housing or housing that fails to meet basic needs for safety, stability, or access to jobs and services. This dynamic not only deepens inequality but also exacerbates housing insecurity and displacement among the most vulnerable populations.

While the data for Woodstock is too low quality to draw specific insights, patterns mirror those across Shenandoah County. The town lacks enough rental units that are both affordable and available for households earning less than 30% of AMI, leading to housing cost burden among many low-income families. Despite many renters earning greater than 80% of AMI, the town contains very few rental units priced to serve this income group. Most of the rental units in Woodstock are priced for the 50-80% of AMI affordability range, causing households both above and below this income range to compete for the same housing, which is ultimately disadvantageous for low-income households.

Homeowner Gap Analysis



Shenandoah County lacks a sufficient supply of owner-occupied housing that is affordable and available to households earning less than 50% of AMI, and more than two-thirds (68%) of the homes with monthly costs that are affordable for this income group are occupied by households with higher incomes.

Additionally, many homeowners with incomes above 50% of AMI reside in homes that cost less than their budgets could reasonably support. There are 4,405 households earning more than 100% of AMI that occupy units priced lower than their budgets could support. Notably, 1,825 of these higher-income households live in homes priced for incomes between 80-100% of AMI, while the remaining 2,580 occupy homes that could be affordable to households earning less than 80%, or in some cases, less than 50% of AMI.

Despite this, 33% of households living in units priced for households earning greater than 100% of AMI have incomes below this affordability level. The lack of supply on either end of the income spectrum (specifically for those earning below 50% and above 100% of AMI) concentrates both lower- and higher-income in units that do not match the housing budgets that their incomes can reasonably support. When these groups compete for the same housing, lower-income families are placed at a disadvantage and may be forced to choose between more expensive housing or housing that fails to meet basic needs for safety, stability, or access to jobs and services. This dynamic not only deepens inequality but also exacerbates housing insecurity and displacement among the most vulnerable populations.

Another explanation for the high number of households with incomes greater than 100% of AMI living in lower-cost housing could be a lack of desirable “trade up” options. If higher-income households would prefer to move into higher-cost homes but remain in lower-cost units due to a lack of available options, the for-sale housing market may not be adequately responding to demand. This imbalance limits mobility across the income spectrum and restricts access to homeownership for lower-income households that are most in need of affordable housing options.

Moreover, recent survey data indicates widespread negative perceptions and expectations regarding housing affordability, with the majority of Americans reporting that average households are unable to purchase homes in their area and that current market conditions are unfavorable for buyers.⁴ Following historically low mortgage rates during the COVID-19 pandemic, which produced significant refinancing gains for higher-income homeowners, elevated mortgage rates have constrained both homeowner mobility and renter access to

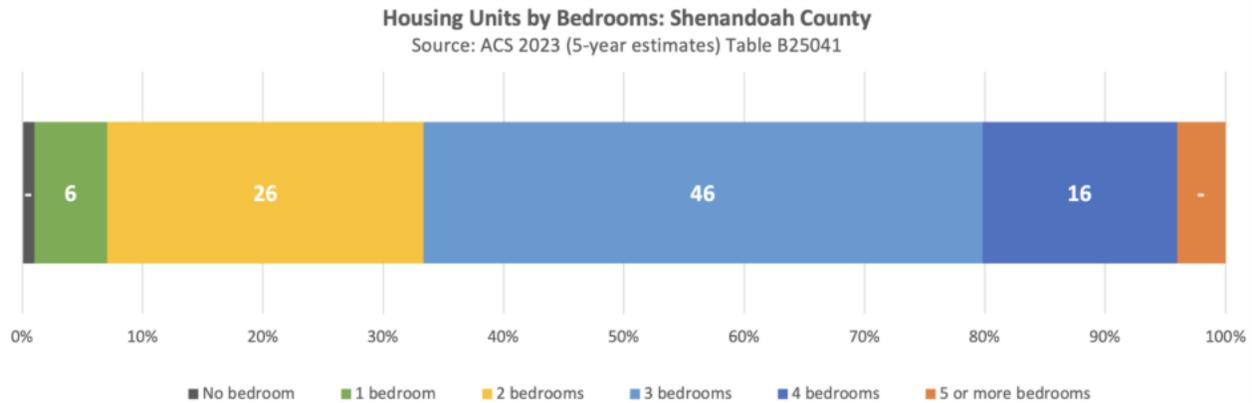
⁴ Cato Institute. (2022). *Cato Institute 2022 Housing Affordability National Survey*.
<https://www.cato.org/sites/cato.org/files/2022-12/housing-affordability-survey-toplines.pdf>

homeownership.⁵⁶⁷ These financial considerations and expectations contribute to the trend of higher-income homeowners remaining in smaller, lower cost, or lower quality homes when they could comfortably afford to “trade up.”

While the data for Woodstock is too low quality to draw specific insights, patterns mirror those across Shenandoah County. The town lacks enough owned or for-sale units that are both affordable and available to households earning less than 50% of AMI, causing many of these low-income households to pay more for housing than they can reasonably afford to. Woodstock also lacks enough stock priced to serve households earning greater than 100% of AMI, causing many of these households to compete with lower-income families for housing.

Small Units

In Shenandoah County, there is a mismatch between the number of bedrooms in the county’s housing units and the number of people that make up the county’s households. Nearly half (46%) of the housing stock in Shenandoah County is made up of three-bedroom units, and a total of at least 65% of units have three or more bedrooms.



⁵ Freddie Mac. (2024). *Primary Mortgage Market Survey*. Retrieved June 12, 2024, from <https://www.freddiemac.com/pmms>

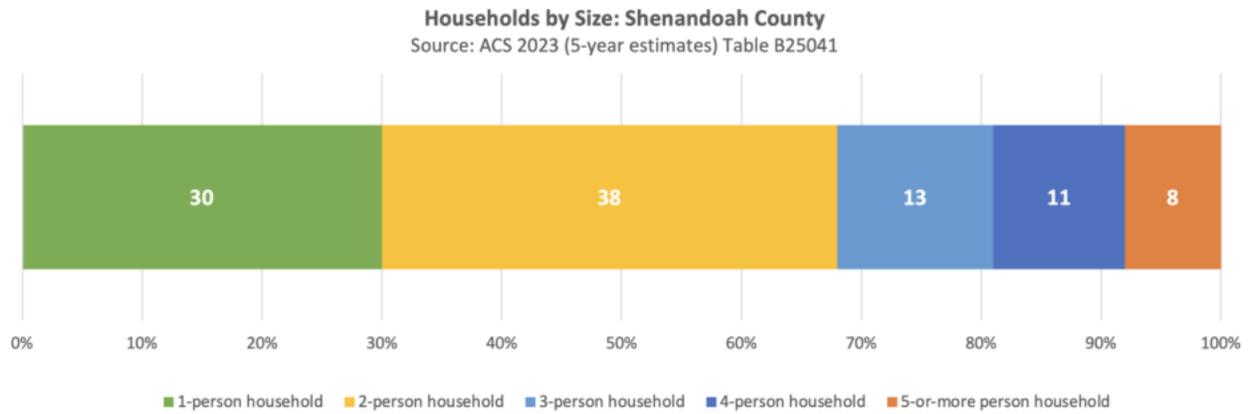
⁶ Agarwal, S., Chomsisengphet, S., Kiefer, H., Kiefer, L. C., and Medina, P. C. (2023). *Refinancing Inequality During the COVID-19 Pandemic*. Federal Deposit Insurance Corporation Center for Financial Research Working Paper. <https://ssrn.com/abstract=3750133>

⁷ Federal Reserve Bank of New York. (2024). *Center for Microeconomic Data SCE Housing Survey*. Retrieved June 12, 2024, from https://www.newyorkfed.org/microeconomics/sce/housing#/housing_outlook_8

Housing Units by Bedrooms: Shenandoah County (with % of Total)

Studio	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms						
Up to 2 people	Up to 2 people	Up to 4 people	Up to 6 people	Up to 8 people	Up to 10+ people						
62 - 320	0 - 2	1,221	6	5,596	26	9,910	46	3,484	16	673 - 1,161	3 - 5

Originally built to serve larger average household sizes in the past, these units no longer match the needs and preferences of most of the county’s households. Just 32% of households in the county include three or more people. Over two-thirds of the county’s households (68%) are made up of just one or two people, including retired and elderly individuals and couples, early-career young adults, and higher-earning mid-career individuals and couples with no children in the house.



Both renter and owner households are primarily made up of one- and two-person households: 66% of homeowners and 72% of renters live in single-person or two-person households, representing an aging population living alone or in couples and younger people living independently or in couples.

Household Size by Tenure: Shenandoah County

	1-person	%	2-person	%	3-person	%	4-person	%	5+ person	%
Owner	3,546	28	4,926	38	1,846	14	1,429	11	1,130	9
	1-person	%	2-person	%	3+ person	%				
Renter	1,719	35	1,806	37	1,380	28				

Source: ACS 2023 (5-year estimates) Table B25009

Household Size

	1- to 2-person	%	3+ person	%
Basye CDP	312 - 598	56 - 100	14 - 192	2 - 34
Edinburg	339 - 601	51 - 91	110 - 268	17 - 41
Maurertown CDP	90 - 252	27 - 75	85 - 241	25 - 72
Mount Clifton CDP and Toms Brook	166-340	35 - 72	132 - 308	28 - 65
Mount Jackson	548	67	269	33
New Market	593 – 1,011	60 - 100	115 - 263	12 - 27
Strasburg	1,936	65	1,048	35
Woodstock	1,426	64	802	36

Source: ACS 2023 (5-year estimates) Table B25009

While some one- to two-person households may prefer a unit with more than two bedrooms, many remain in larger units (e.g., after adult children have moved out) due to a lack of smaller units that meet their budgets or preferences in style, location, and amenities. With high interest rates and rapidly increasing housing prices, stakeholders describe some Shenandoah County residents wanting to downsize but not wanting to “downgrade,” or not wanting to trade their larger home for a smaller home that may not fit their preferences for quality, style, location, or amenities and may be equally or more expensive than their current home.

Local developers provide insight into the lack of construction of new one- to two-bedroom units in the county. Due to high construction costs, developers report that the sale price of a smaller unit simply is not profitable, and three or four bedrooms are needed to achieve a sale price that offsets construction costs and leaves developers with a profit. In this context, developers bring up minimum lot size requirements as well, explaining that if they were allowed to build multiple small units on a lot typically reserved for a single unit, those one- to two-bedroom units could be profitable enough to build.

Local stakeholders describe high demand in the county for one- to two-bedroom homes for retired and elderly individuals and couples looking to downsize within the community. These households prefer small, single-story single-family detached or duplex homes with accessibility features (e.g., handrails, no stairs, wide doorways) that are near the hospital and other health services. Anecdotally, stakeholders describe a recent development like this that sold rapidly to households aged 55+, demonstrating demand in the county.

Building smaller units may provide more desirable and affordable options for the many one- and two-person households in the county, including retired individuals looking to downsize, young workers, and small, single-earner families who may currently struggle to find available, affordable housing that meets their needs.

Housing Units by Bedrooms: Shenandoah County *(with % of Total)*

<i>Studio</i>		<i>1 bedroom</i>		<i>2 bedrooms</i>		<i>3 bedrooms</i>		<i>4 bedrooms</i>		<i>5+ bedrooms</i>	
<i>Up to 2 people</i>		<i>Up to 2 people</i>		<i>Up to 4 people</i>		<i>Up to 6 people</i>		<i>Up to 8 people</i>		<i>Up to 10+ people</i>	
62 - 320	0 - 2	1,221	6	5,596	26	9,910	46	3,484	16	673 - 1,161	3 - 5

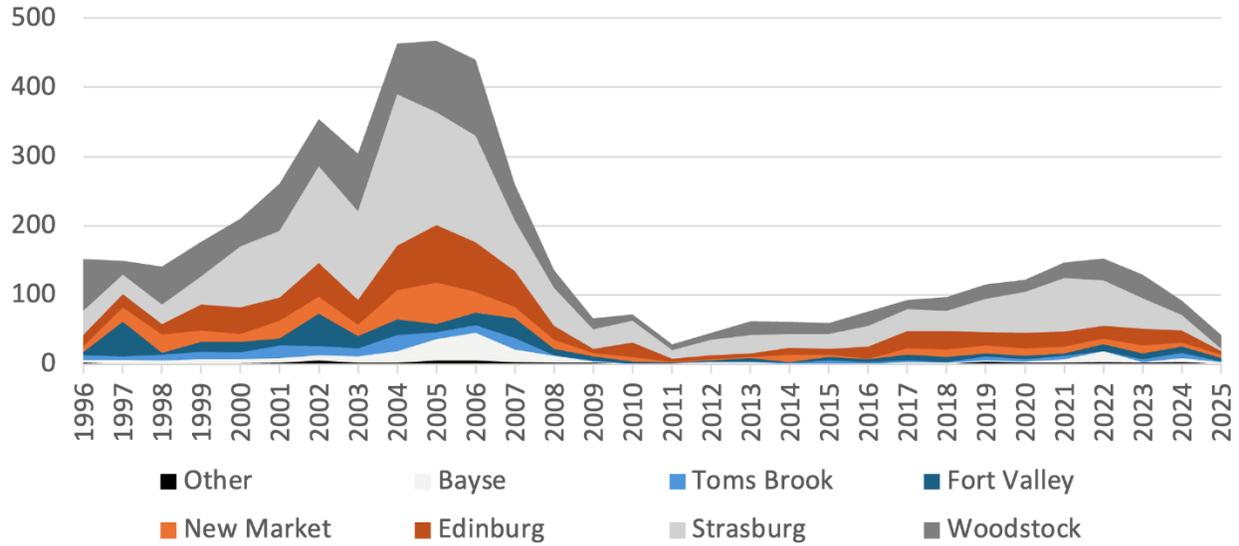
Source: ACS 2023 (5-year estimates) Table B25041

New and Upgraded Units

In recent decades, Shenandoah County saw a peak in housing construction from 2004 to 2006, building over 400 new homes annually, followed by a rapid decline during the Great Recession. Construction slowly increased year over year from 2011 through 2022 but remained far below peak rates. Over recent years, housing construction in the county has slowed again, with fewer than 100 housing unit foundation inspections approved in 2024. When total new building does not respond to net new demand, prices escalate and competition in the market intensifies. Dramatic price and rent increases, along with decreases in days on the market and vacancy rates, discussed in the Market Dynamics section, indicate demand overtaking supply and the need for additional housing units. Furthermore, new units respond to new housing preferences and needs. Replacing units and adding additional ones gives communities the opportunity to increase the variety of units available and respond to changing demand preferences. Households are generally smaller than they were when many single-family homes were built. Communities need more accessible housing units to serve aging residents. Economic shifts and household preferences for walkability and access to community means that homes should be built in towns and other service and amenities centers.

SHENANDOAH COUNTY & TOWN OF WOODSTOCK HOUSING STUDY 2025

Number of Foundation Inspections Approved Annually
Shenandoah County, VA



Source: Shenandoah County, VA
Note: Data from 1996 – 2004 may be incomplete.

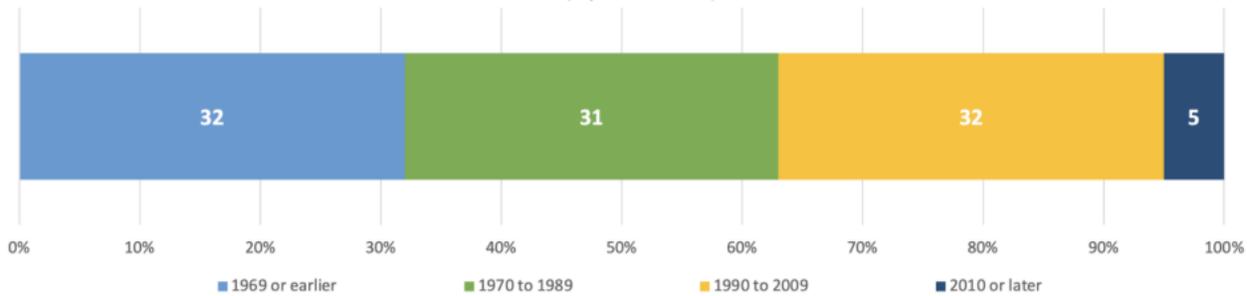
In Shenandoah County, 63% of housing units are over 30 years old, and 32% of housing units are over 50 years old. Just 5% of the county’s housing stock was built after the year 2010. The towns of Mount Jackson and Toms Brook have the highest proportions (at least 44%) of housing units built before the year 1970.

Housing Units by Year Built (with % of Total)

	2010 or later		1990 to 2009		1970 to 1989		1969 or earlier	
Shenandoah County	1051	5	6779	32	6626	31	6863	32

Source: ACS 2023 (5-year estimates) Table B25034

Housing Units by Year Built: Shenandoah County
Source: ACS 2023 (5-year estimates) Table B25034



Homes require regular maintenance, with upgrades, modernizations, and replacements typically needed every 10-15 years. Houses built before 1990 (representing 63% of Shenandoah County's housing stock) may contain outdated finishes or components, and those built before 1980 may contain problematic components, like knob-and-tube wiring or other outdated electrical installations, lead paint or pipes, and inadequate or unsafe insulation.

Local stakeholders emphasize that a significant portion of Shenandoah County's housing stock is aging and in poor condition. Common high-cost problems include aging roofs that are difficult to insure and costly to replace, septic system issues, and foundation issues, all of which deter buyers and leave owners with high financial burdens. Septic issues are particularly evident in rural areas where town sewer systems do not reach, leaving homeowners to rely on individual septic systems that can require costly maintenance. Stakeholders also describe low-income families occupying mobile homes that are "way past their prime," with structural issues (e.g., floors separating from the walls), water damage, and septic system issues. Aging mobile homes also often lack adequate insulation, causing increased heating costs that may put further financial strain on these households.

Local lenders and real estate agents emphasize that even slightly distressed homes (which are often the most affordable options) cannot qualify for certain federal loan programs (e.g., FHA, USDA) due to strict condition standards that exclude homes with even minor flaws such as peeling paint or a cracked window. These condition standards are important for protecting households from substandard living conditions, but they can also create a situation where the most affordable homes become inaccessible to the low-income households who need them. Stakeholders mention that rehabilitation loans are possible (e.g., FHA 203k), but difficult to secure and rare in Shenandoah County.

Homeowners experiencing housing cost burden or other financial burdens may defer maintenance or forgo upgrades to their homes, potentially resulting in substandard living conditions and the dilapidation of housing stock. Local stakeholders observe that some elderly homeowners in the community with financial constraints prioritize other expenses (e.g., medical, food) over necessary home maintenance, resulting in unsafe conditions that could impact their health.

Local stakeholders emphasize a need to invest in rehabilitating older housing units in Shenandoah County through repair assistance or redevelopment to keep the county's housing stock safe, livable, and free from costly issues that develop over decades without maintenance.

Development Priorities

In Shenandoah County, demand for rental housing and homeownership opportunities is strong across a range of locations, price points, and housing types. Demand from homebuyers is strongest in Strasburg, Woodstock, and New Market, where homeowner vacancy rates are low and homes sell quickly. These towns also contain much of the county’s rental activity, and their low rental vacancy rates and high absorption numbers relative to other towns indicate strong rental demand as well.

While these towns show the highest demand right now, current demand patterns reflect existing infrastructure, regulations, amenities, and market accessibility. Investments targeting other towns in more rural parts of the county could expand or shift this demand, especially with a large and growing pool of higher-income workers from Harrisonburg, Winchester, and the D.C. area seeking housing in Shenandoah County. The report discusses the constraints in more detail in the Development Constraints section.

This section details the characteristics of housing that Shenandoah County and the Town of Woodstock should prioritize in order to serve specific groups who may currently face a lack of housing that meets their budgets, needs, and preferences. Developments do not need to be *exclusively* focused on these populations and housing types, rather the County and jurisdictions therein should encourage new developments to include units and buildings that address these gaps. If gaps remain, jurisdictions may consider incentivizing the inclusion of specific units.

Specific gaps and opportunities for development in the county’s housing supply include

1. **Affordable rental units for low-income households:** small one- to two-bedroom units priced affordably for households earning less than 80%, less than 50%, and less than 30% of AMI
2. **Affordable starter homes:** small single-family detached homes (under 1,500 square feet), duplexes, and townhomes priced affordably (under \$250k - \$300k) for young families, first-time buyers, and essential workers
3. **Senior housing:** small, single-story detached homes or duplexes with one to two bedrooms designed for accessibility and nearby healthcare services (e.g., Shenandoah Memorial Hospital in Woodstock)
4. **Higher-end homes:** large, detached homes with modern amenities to absorb demand from higher-income workers (e.g., commuters who work in Winchester, Harrisonburg, and the D.C. area) and relieve pressure on mid- to lower-priced housing on the market
5. **Mixed-use development:** walkable neighborhoods and town centers with mixed-density housing integrated with commercial buildings and shared green spaces

Housing for Low-Income Residents

In Shenandoah County, there is a significant need for more affordable housing options among low-income households experiencing housing cost burden. When a family is housing cost-burdened, meaning they spend over 30% of their income on housing, they may compromise on necessities such as food, healthcare, transportation, and education in order to pay for housing. The risk is even greater for households who are severely housing cost-burdened, meaning they spend over half their income on housing. These households often forgo other necessities and may be at risk of homelessness if they encounter an emergency expense or other sudden economic hardship.

The following table displays the number of households by income and by tenure that currently experience housing cost burden. These counts represent Shenandoah County families in urgent need of more deeply affordable housing options. There are at least 1,005 families (678 homeowners and 327 renters) in need of housing that is affordable for households earning less than 30% of AMI. There are at least 800 families (382 homeowners and 418 renters) in need of housing that is affordable for households earning 30-50% of AMI. There are at least 752 families (365 homeowners and 387 renters) in need of housing that is affordable for households earning 50-80% of AMI. There are at least 236 homeowners in need of housing that is affordable for households earning 80-100% of AMI. And at least 208 homeowners earning greater than the median income are in need of more affordable housing options.

Cost-burdened Households by Income: Shenandoah County

	<i>Owner</i>		<i>Renter</i>	
	<i>Cost burdened</i>	<i>Severely cost burdened</i>	<i>Cost burdened</i>	<i>Severely cost burdened</i>
<50% AMI	1,480	1,100	1,083	464 - 814
50-100% AMI	918	22 - 154	384 - 816	0 - 151
>100% AMI	208 - 472	0 - 84	0 - 89	0 - 63

Source: CHAS 2017-2021 Table 7

These cost-burdened households include many different types of households, such as single-earners, young families, late-career dual earners, and elderly or retired individuals. As such, many different types of housing within these price ranges are necessary to address these households’ unique needs. This includes both rental and for-sale units, many one- to two-bedroom units, some multifamily and single-family attached units, and some single-family detached units that are specifically accessible for elderly residents.

Stakeholder Input: Affordable Rentals

Local real estate agents, nonprofits, and health professionals highlight the severe shortage of affordable rental units in Shenandoah County, stating that many senior households, single-earners, and young adults struggle to find affordable housing. There is a particular need for subsidized, deeply affordable rentals for people aged 55+ as well as younger families. Anecdotally, many families served by nonprofits in the county can only afford \$800–\$900 in rent. Even when rent is affordable, high security deposits (sometimes double or four times the rent) and credit score requirements can prevent access for low-income renters, and some families end up living in motels long term. Domestic violence survivors and undocumented families face additional barriers to finding affordable rental options in the county. The county's few subsidized rental units have a long waitlist, and the few emergency shelters often serve a role more like transitional housing due to a lack of such services. Stakeholders describe the rental market in Shenandoah County as being especially unstable for low-income renters, with frequent property manager turnover and inconsistent lease enforcement on top of a general lack of affordability.

Stakeholder Input: Small, Lower-cost Homeownership Options

Local developers, lenders, and nonprofits see a strong demand for small, affordable homes priced as low as \$150k–\$200k throughout the region, especially for first-time buyers, young couples, and essential workers like teachers and firefighters. Stakeholders observe that even households with two incomes find it difficult to afford homes in the current market. Some families are seeking homes around 1,500 square feet and are willing to accept attached units, but developers reiterate that building such small homes (one to two bedrooms) is simply not profitable in the current market, as zoning regulations require large lot sizes, and high road frontage and utility access can be expensive and logistically challenging. Additionally, developers state that construction costs have "doubled" in recent years, and they are anecdotally "unable" to build new homes priced below \$350k. In order to afford homeownership, local Realtors have increasingly noticed some families relying on parents to provide financial support, co-sign, or gift equity. Stakeholders state that the market lacks "nice" smaller homes, and locals are hesitant to downgrade to older or substandard housing, even if their current home is larger than they may prefer. Additionally, stakeholders emphasize that FHA and USDA loan programs impose strict condition standards, excluding many older homes that need only minor repairs.

Housing for Aging Residents

In Shenandoah County, there are 4,719 homeowner households and 1,124 renter households led by a householder aged 65+. Many of these one- to two-person households are likely to be retired, and may be looking to transition into smaller, less costly, more accessible, and/or more manageable housing located closer to amenities and services. Across the nation, 73% of adults aged 50+ would prefer to “age in place,” or remain within their current community in their retirement. Most adults aged 50+ (64%) would consider downsizing if a smaller residence better met their needs, and among those who would consider it, they would mainly consider moving into a smaller single-family home (75%), duplex (43%), or townhouse (39%).

Most householders aged 65+ in Shenandoah County earn household incomes below \$50,000 (3,126, or 54%), and 1,856 earn household incomes below \$30,000. Nationwide, householders aged 50+ report housing cost issues as the most relevant reason for expecting to move later in life.

The county is in need of housing units that are affordable for retiring households looking to downsize and that meet these households’ preferences and budgets. Development should focus on small, one- to two-bedroom single-family detached units that are designed for accessibility (e.g., single-story layouts, no-step entryways, wide doorways).

Stakeholder Input

Local stakeholders, including real estate agents, lenders, and developers, emphasize the growing demand in the county for single-story detached homes and duplexes tailored to seniors. Local seniors are looking to age in place in the community, and they have a strong preference to live near Shenandoah Memorial Hospital in Woodstock. Duplexes and small homes with accessibility features such as grab bars, no tripping hazards, and main floor laundry are highly preferred. Stakeholders reference a previous wave of duplex construction in Woodstock that sold out quickly, primarily to retired households. Many older residents are downsizing from large rural homes and want to remain in the county, but the current inventory is limited, and new construction is not necessarily tailored to these households' needs.

Housing for Commuters

Throughout Shenandoah County, there is housing demand from higher-income workers employed in the Winchester area, the D.C. metro area, and the Harrisonburg area. Seeking a

more rural lifestyle or more affordable housing than is available in the city, these households tend to have higher budgets than local workers. This demand comes from a large, diverse group of households with a range of preferences, including high-end rentals and small homes for single-earners or young families, higher-cost homeownership options for mid-career professionals and dual earners, and accessible downsizing options for households near retirement.

Currently, Shenandoah County lacks an available supply of high-end rental and for-sale options, meaning that some of these commuters occupy units that are priced well below the upper end of their budgets. If additional high-cost units were added to the market to sustain some of this demand, there may be less competition for lower-cost units, and less pressure on local workers and lower-income households seeking housing in the county.

Stakeholder Input

Local stakeholders, including real estate agents and developers, note that higher-income workers in the Winchester area and the D.C. metro area are increasingly seeking housing in Shenandoah County. These buyers are often looking for larger, newer homes with modern amenities, and they can afford higher price points than local residents. At the north end of the county, Strasburg is particularly attractive to these commuters, but demand stretches across the entire county. Stakeholders have observed that this demand has contributed to rising home prices and competition in the market, and in some cases has pushed out lower-income local buyers. A few of these higher-income workers are interested in second homes or retirement properties, especially in scenic areas like Basye. In general, these workers tend to prefer single-family detached homes with good internet connectivity and access to services and amenities.

General Housing Demand

Recent national survey data indicate that interest in homeownership remains widespread, particularly among first-time buyers, but that the path to homeownership has become more constrained and prolonged. Reports produced by Virginia REALTORS® indicate that buyer profiles in Virginia closely mirror national trends, with affordability constraints shaping outcomes even as demand remains present. The median age of homebuyers continues to rise, with the median age of first-time buyers in Virginia reaching 40 in 2025. Among first-time buyers, 92% used financing, compared to 70% of repeat buyers. Virginia homebuyers moved a median distance of 20 miles in 2025, demonstrating the common preference of homebuyers to upgrade or downsize within their current community. Notably, Virginia follows national trends

of a declining share of buyers citing proximity to work as their top priority, suggesting greater willingness to adjust commute distance in exchange for affordability or housing availability.

In Shenandoah County specifically, local real estate agents and developers notice that while buyers generally prefer single-family detached homes, many are willing to settle for townhomes or condos if they are well maintained, move-in ready, and equipped with certain amenities (such as garages or multiple bathrooms). Anecdotally, stakeholders mention that existing condos in the area are often in poor condition, making them difficult to insure or finance and less desirable to buyers.

Virginia-specific renter profiles indicate that renters represent a diverse set of households with varying motivations, including flexibility, proximity to employment, and access to amenities, alongside cost considerations.⁸ Analyses by the National Apartment Association further emphasize that renter outcomes are shaped by broader market and regulatory conditions. Reports point to rising operating costs, including labor, insurance, and regulatory compliance, as contributing factors to rent pressures and slower new supply.^{9,10}

Local stakeholders express interest in developing walkable, mixed-use neighborhoods with diverse housing types. Woodstock is specifically highlighted as a prime location for this type of development, especially given its existing amenities, infrastructure, and growing appeal to young families and retired households. Stakeholders describe these mixed-use developments as a mix of condos, townhomes, single-family homes, shared green spaces, and amenities like restaurants and shops. Stakeholders mention that zoning codes currently make mixed-use and higher-density development difficult, and tap fees and infrastructure debt are major financial barriers, particularly for small-scale developers looking to build four- to six-unit developments. This type of development could support both residential and economic growth, and stakeholders believe that incentives for redeveloping historic buildings and easing zoning restrictions could make mixed-use, higher-density development more feasible.

Development Constraints

This section analyzes regulatory, utility, and community constraints to the production of new dwelling units in Shenandoah County and its towns. While several physical and cost constraints impact housing development, the primary constraints that communities and their local

⁸ Virginia REALTORS®. (2024). Look who is renting: 2024 profile of Virginia renters.

⁹ National Apartment Association. (2025a). 2026 apartment housing outlook.

¹⁰ National Apartment Association. (2025b). Behind the high cost of rent.

governments can change are regulation, infrastructure, and community perceptions. The following section discusses recommended changes.

Regulatory Barriers

Housing Type	C-1	A-1	R-1	R-2	R-3	R-4
Single Family Detached						
Single Family Attached				SUP	SUP	
Duplex/TwoFamily				SUP		
Townhouse					SUP	
Manufactured Housing					SUP	
Multifamily Structure	SUP****	SUP****	**	**	SUP	
Elderly Care Facility	SUP	SUP	SUP	SUP	SUP	SUP
Group Home	*	*	*	*	*	*
Accessory Dwelling	#	#	***	#	#	
Boarding House						

- Not permitted
- Permitted, with geometric requirements
- Special Use Permit required
- Group Homes, subject to Code of Virginia

* State Code 15.2-2291 supersedes local regulation regarding group homes
 ** Not permitted, unless a structure built prior to 1978 is converted to a multifamily structure of 4 units or less
 *** One accessory dwelling per lot which shall not exceed 1,200 square feet of finished livable floor area per lot. 5-foot rear setback + setbacks for principal structure.
 ****1

Source: Shenandoah County Zoning Ordinance

Multifamily structures that can efficiently house more people, including vertical mixed-use buildings, are tightly restricted in the current zoning ordinance. The ordinance offers more flexibility to build single-family houses at lower density and with larger lots. Developing single-family detached housing with large lots on large “greenfield” parcels is most feasible, while construction of multifamily units close to desired core areas with services, amenities, and infrastructure is less feasible.



It's easier to build the type of structures on the left, and harder to build the structures on the right. This is despite the benefits to affordability and community vitality that mixed-uses and more dense development can bring.

Zoning has evolved over time so that certain types of dwelling units are more heavily scrutinized or regulated out of existence than others, often through requirements such as buffering, screening, or large acreage requirements. As a result, housing types other than single-family detached are rarely developed. Although single-family detached or attached units are often easier to build, they can negatively affect communities by consuming farmland, featuring challenging architectural characteristics, and reinforcing auto-centric design.



Typical subdivision developments, while providing new housing units, typically take up a lot of land for just one use. Historical development patterns were more dense and diverse in type and use. Despite planning efforts and community preference toward walkable/vibrant towns, the regulations in place make “town-building” very difficult or impossible.

Current zoning codes may prevent the construction of multifamily and mixed-use developments that would achieve the county’s goals of creating denser and more vibrant downtown cores in Woodstock and other towns.

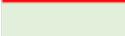
Currently in Shenandoah County, higher-density dwelling units are reserved for R-3 zoning only. The minimum lot size of 20,000 square feet for a single-family detached unit in an R-3 high-density residential zone is the same as the medium density zone of R-2 and only 10,000 less than R-1 low density residential. This may make rezoning to R-3 in order to provide higher-density units less feasible than simply developing at lower to medium density. If a townhome or apartment building is proposed, a special use permit and review of character, congestion, and other factors is required. This review creates additional risk for a developer that could disincentivize development. To propose attached or multifamily units, a developer must pursue land, design a project, and still potentially receive denial. As there are not many townhomes or apartment buildings in Shenandoah County, developers may be concerned that a higher-density project could be rejected due to congestion or incompatibility with the existing character of nearby structures.

Moreover, requirements for dimensions, parking, and open spaces require higher-density projects to be located outside core areas where the parcel sizes are smaller. However, without

adequate access to public services, projects outside these core areas may face concerns about incompatibility with local character, increased congestion, and other issues.

Housing Type	R-1	R-2	R-3	B-1
Single Family Detached	Permitted, with geometric requirements	Permitted, with geometric requirements	Permitted, with geometric requirements	SUP
Single Family Attached	Not permitted	Permitted, with geometric requirements	Permitted, with geometric requirements	Not permitted
Courtyard Home	Not permitted	Permitted, with geometric requirements	Permitted, with geometric requirements	Not permitted
Manufactured Housing	Not permitted	Not permitted	Not permitted	Not permitted
Multifamily Structure	Not permitted	Not permitted	Permitted, with geometric requirements	Permitted, with geometric requirements
Elderly Care Facility	Not permitted	SUP	SUP	Not permitted
Group Home	*	*	*	*
Accessory Dwelling	Not permitted	Not permitted	Not permitted	Not permitted
Boarding House	Not permitted	Not permitted	Not permitted	Permitted, with geometric requirements

Source: Town of Woodstock Zoning Ordinance

	Not permitted
	Permitted, with geometric requirements
	Special Use Permit required
	Group Homes, subject to Code of Virginia

* State Code 15.2-2291 supersedes local regulation regarding group homes.

Woodstock’s zoning districts are similar to the county’s districts. The largest zoning district by area is R-1 low-density residential district, comprising approximately 34% of all land area within the town. The R-1 low-density residential district has a minimum lot size of 17,500 square feet for lots with public water and sewer. Single-family detached structures are required to be set back 35 feet from streets 50 feet or greater in width. The minimum lot width is 100 feet, and the maximum building coverage is 25% with a maximum height of 35 feet. No other forms of housing are permitted within the R-1 district.

The second-largest zoning district by area is the R-2 medium-density residential district, encompassing approximately 500 acres or 23.2% of the town area. Minimum lot sizes are smaller at 12,000 square feet for a single-family detached home with a maximum building coverage of 40%. Duplexes are permitted with a minimum lot size of 6,000 square feet and two mandatory off-street parking spaces per unit. Within the R-2 district, the Town also permits courtyard homes, defined as “a single family detached dwelling, on its own lot, located in a

grouping of at least four such units, intended to be used as a residence for small families who do not desire the maintenance associated with large lots.”¹¹ Within this district, elderly care facilities are permitted with the approval of a special use permit.

The R-3 high-density residential district permits detached single-family detached units with a minimum lot size of 10,000 square feet. Duplexes require a minimum lot size of 6,000 square feet per unit and two off-street parking spaces per unit. The same requirements are applied to courtyard home-style units in the zoning district. Additionally, R-3 is one of two districts that permit multifamily housing. Multifamily structures have a height limit of 35 feet (i.e., approximately three stories).

The B-1 district is Woodstock’s mixed-use district, permitting residential, office, and commercial within the downtown area. The B-1 district is under 50 acres and makes up approximately 2% of Woodstock’s total area. The B-1 district uniquely restricts the development of single-family detached housing, requiring a special use permit. Additionally, the zoning ordinance specifies that no more than 25% of the district can be composed of single-family residential units without prior approval from the Town Council. The district permits multifamily dwellings with a height limit of 45 feet (i.e., approximately four stories) and additional dimensional requirements. For residential developments with more than four units, the minimum lot size is 6,000 square feet, plus an additional 1,500 square feet for each dwelling unit above four. Twenty feet of setback is required for residential developments, as well as 12 feet of side yard and 25 feet of rear yard. These setbacks are accompanied by screening requirements for neighboring residential districts.

Community Concerns About Proposed Development

Consistent with statewide and nationwide trends, Shenandoah County and its towns hear concerns from some residents regarding the development of new housing units. While housing production largely slowed due to economic recession over the last 15 years, increased community opposition to new developments may also have contributed to the slowdown. Recently, the county has seen forward motion on some “legacy” developments that were previously approved but not constructed due to supply chain issues and other economic factors. Community reaction to this revived construction has increased concern about newly

¹¹ Town of Woodstock. n.d. “ARTICLE I. - IN GENERAL | Code of Ordinances | Woodstock, VA | Municode Library.” Accessed November 5, 2025. https://library.municode.com/va/woodstock/codes/code_of_ordinances?nodetid=PTIICO_CH90ZO_ARTIINGE_S90-1DE.

proposed projects, especially as the demand for housing from areas closer to Washington, D.C., and other parts of Northern Virginia begin to reach the county.

In the early 2000s, county residents resisted development of a townhouse community with lot sizes around 1,700 square feet. The community was built in accordance with the County's zoning code, but public opposition prompted the town to adopt its own zoning. The town's adopted zoning code changed the residential districts to a large-parcel, single-family detached housing district, requiring at least 10,000-square-foot lots. Due to the age of housing stock within the town, this made most of the town's existing housing units non-conforming and prevented similar residential development, even on vacant lots. In recent years, this town has voiced opposition to development projects that were to be built outside the town and be reliant upon county public services. Reasons for opposition were numerous but included concerns regarding traffic congestion, lack of infrastructure, and historical preservation.

Another town within Shenandoah County has faced similar challenges, despite guidance offered through a recently adopted Comprehensive Plan. The Comprehensive Plan had support from both the Town Council and the Planning Commission. However, projects consistent with the plan's recommendations were still denied when community opposition outweighed the Comprehensive Plan's guidance. One town has recently explored halting new housing development. One effort to do so was to rezone residential land previously designated for over 400 homes to light-industrial use, thereby making residential development much more difficult within that area.

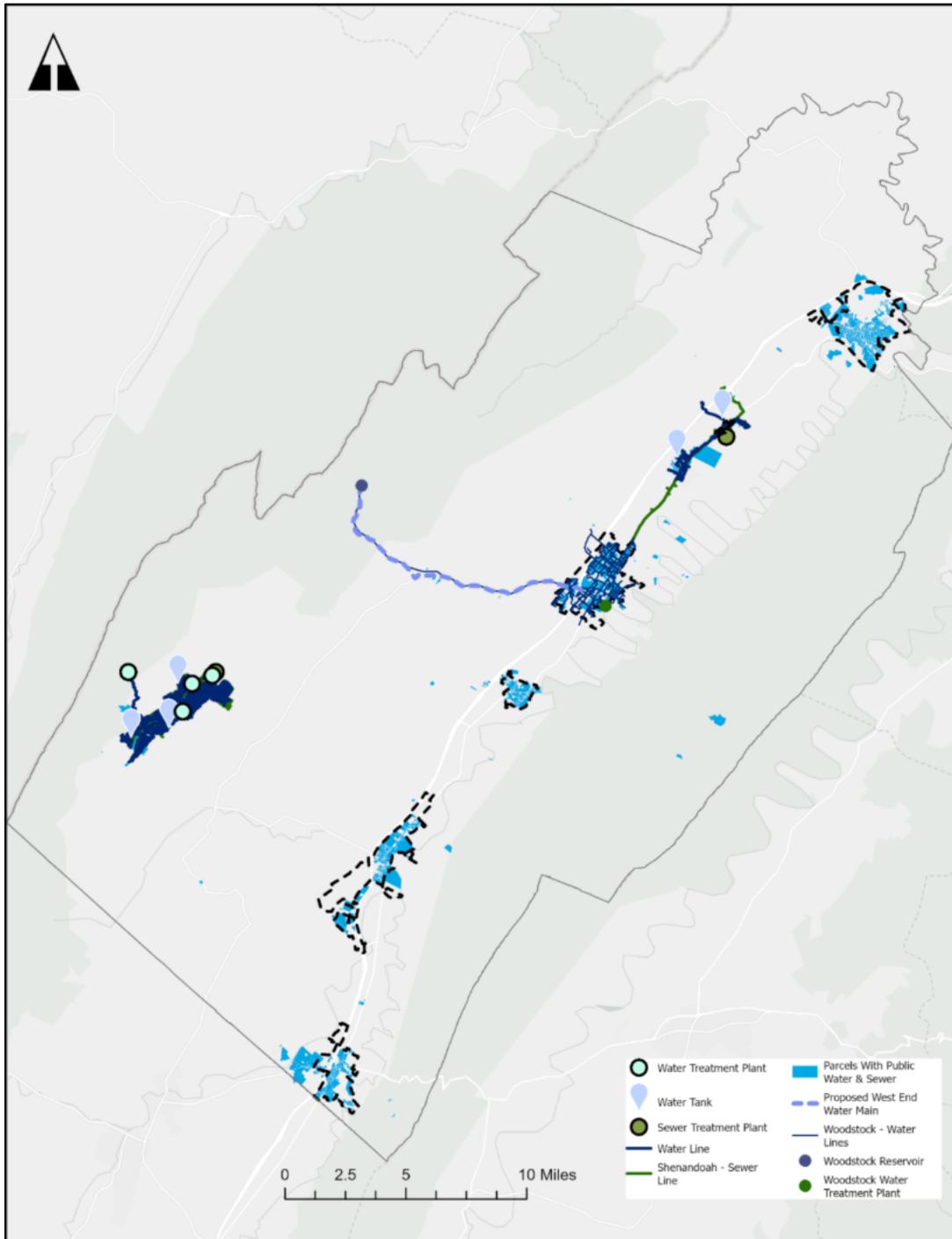
While these examples show some resistance to new housing development in the county, Woodstock has shown flexibility with adopting zoning allowances and encouraging infill development over the past five years.

- In 2019, Woodstock enabled multifamily stacked townhomes and approved a special use permit for a site-specific development anticipated to be completed by 2026.
- In 2020, the Town's old school property was redeveloped through a public-private partnership to convert the structure into new market-rate apartments within walking distance of downtown.
- The Town recently collaborated with a developer and modified zoning ordinance standards for a 48-unit mixed-use residential building on a property zoned "Highway Commercial (B-2)" across from the hospital. This type of development, once completed, would be the first of its kind in the community.
- The Town Council also recently approved the rezoning of a property on West Locust Street from R-3 to B-1 to enable a by-right apartment infill project that is currently proceeding through site plan development review.

This successive progress on delivering new types of housing and bringing units to market shows that although there is ongoing dialogue over change in the built environment and increased density, there is plenty of room to showcase successful examples and address local concerns.

Utilities – Water/Sewer

Map 1. Shenandoah County Water & Sewer Coverage



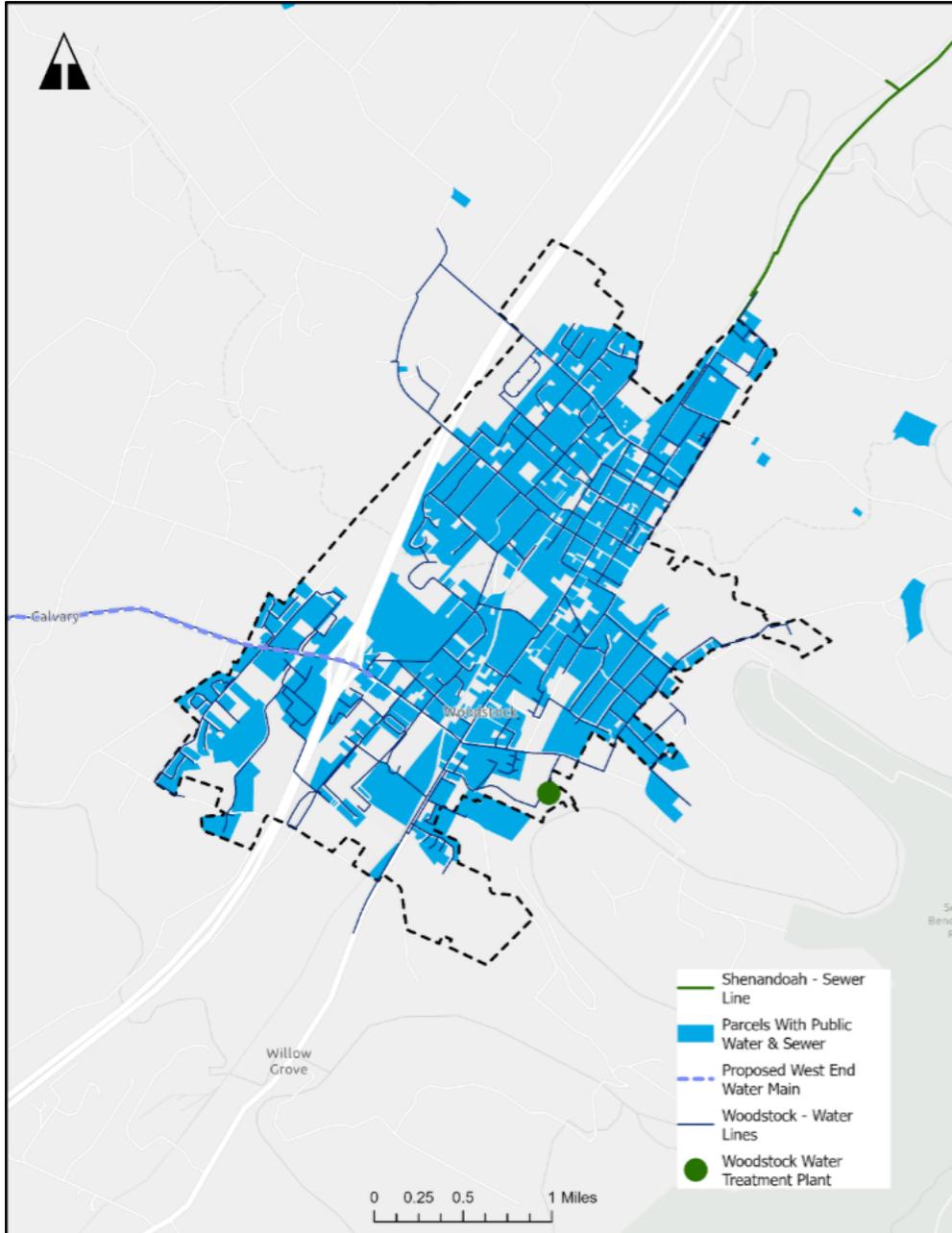
Source: Shenandoah County GIS, Shenandoah County Assessor

The map above shows the key water and sewer utilities provided by Shenandoah County, as well as the parcels that are connected to local water and sewer. This map helps to provide

SHENANDOAH COUNTY & TOWN OF WOODSTOCK HOUSING STUDY 2025

context as to where housing development can feasibly occur, which is within incorporated towns and, in some cases, outside incorporated towns.

Map 2. Woodstock - Parcels with Water/Sewer Access or Hookup

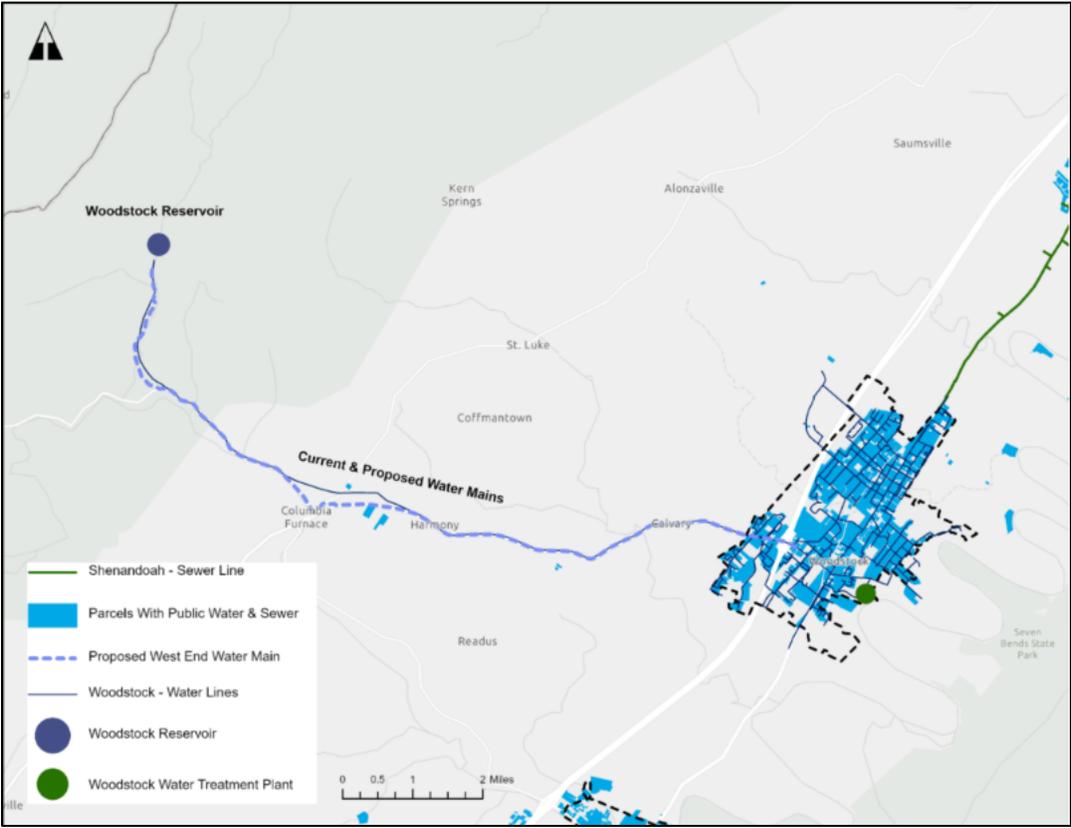


Source: Shenandoah County GIS, Shenandoah County Assessor

Nearly all properties within the Town of Woodstock are connected to Woodstock's water and sewer system. Woodstock's ability to provide water and sewer to a majority of its neighborhoods make it a more feasible place to develop housing when compared to most areas in Shenandoah County.

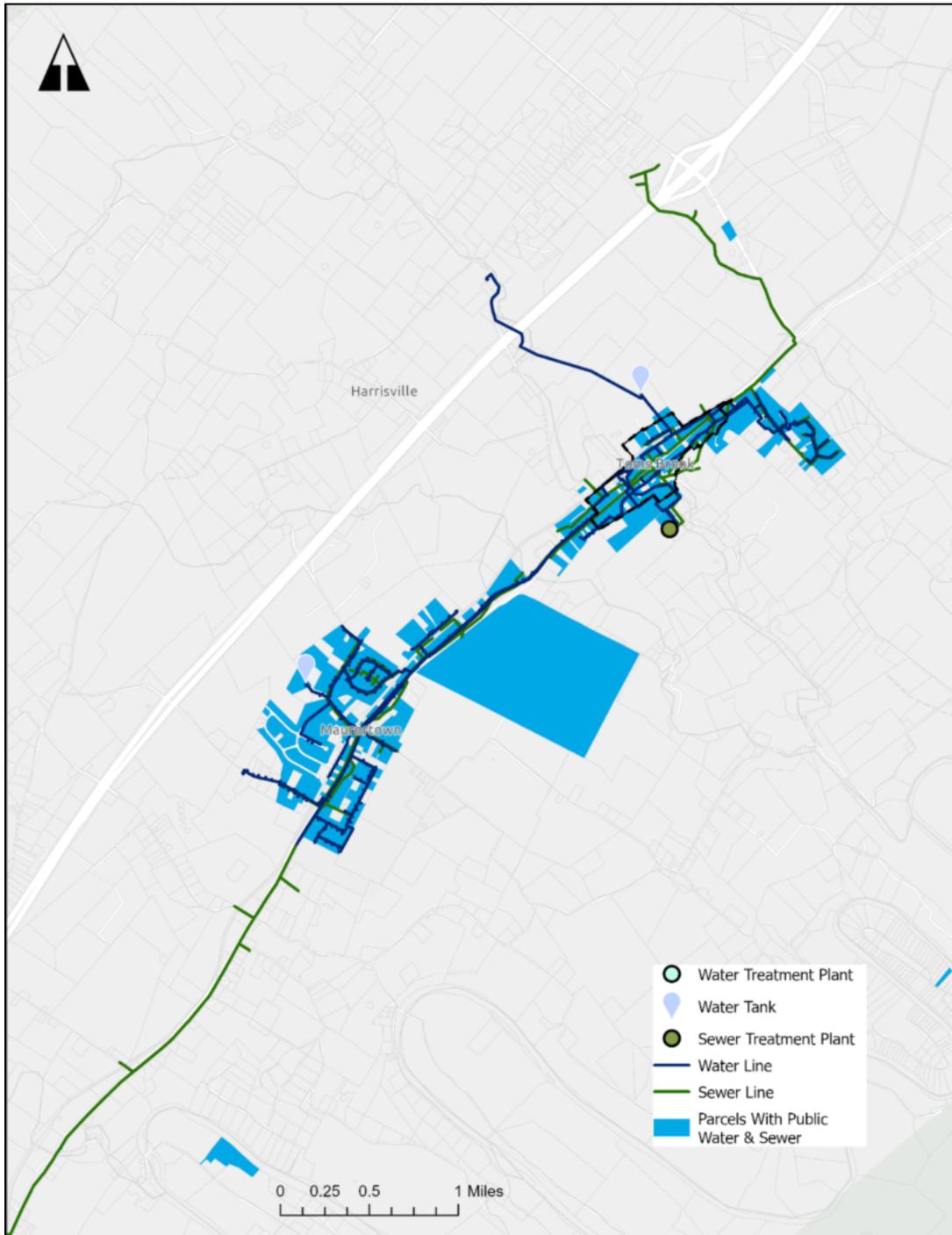
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Map 3. Woodstock - Proposed West End Water Main + Reservoir



SHENANDOAH COUNTY & TOWN OF WOODSTOCK HOUSING STUDY 2025

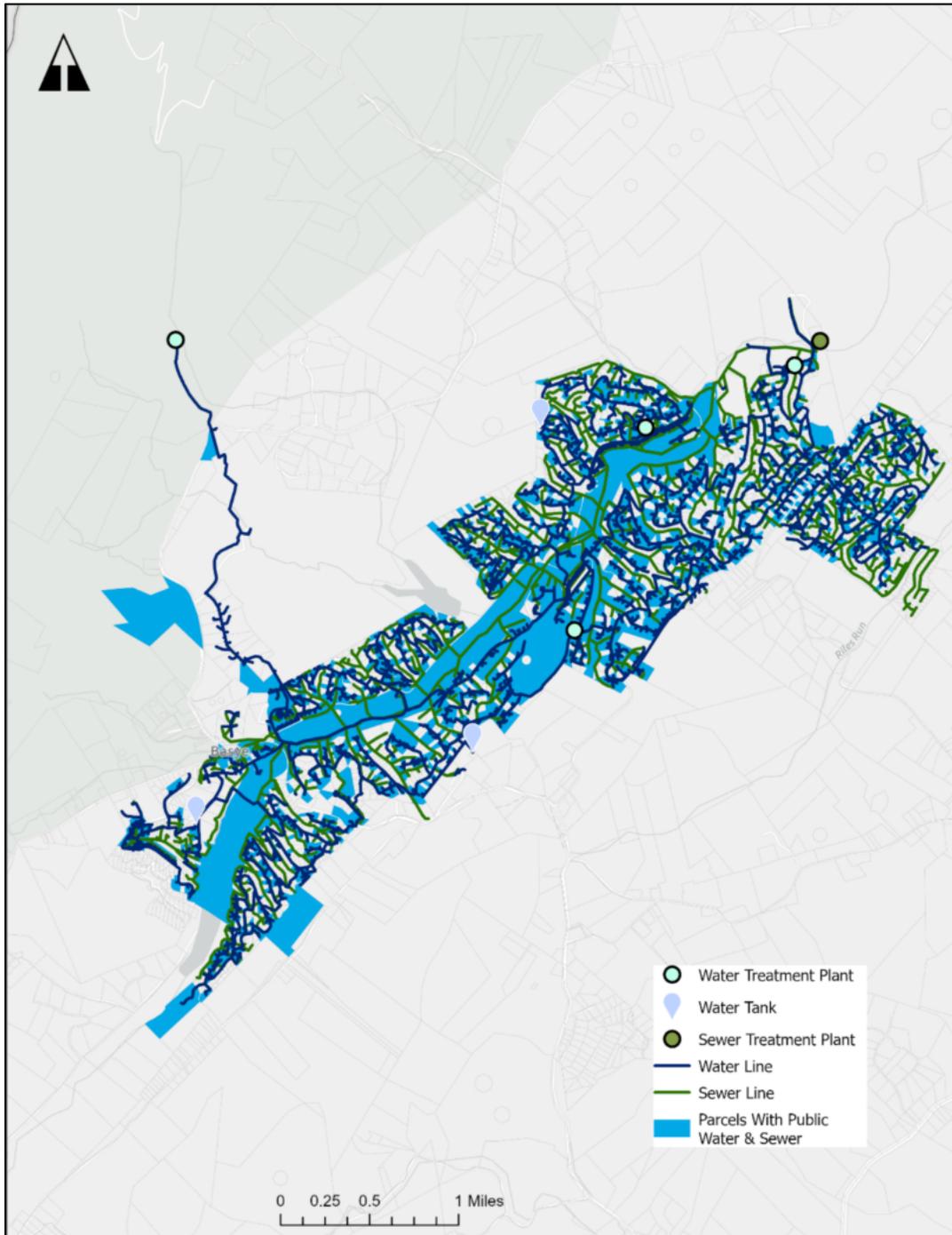
Map 4. Maurertown and Toms Brook Water & Sewer Coverage



Source: Shenandoah County GIS, Shenandoah County Assessor's Data

Shenandoah County supplies water and sewer utility services to Maurertown, which is located between Toms Brook and Woodstock. The area is served by two water tanks, a sewer treatment plant, and miles of water and sewer lines.

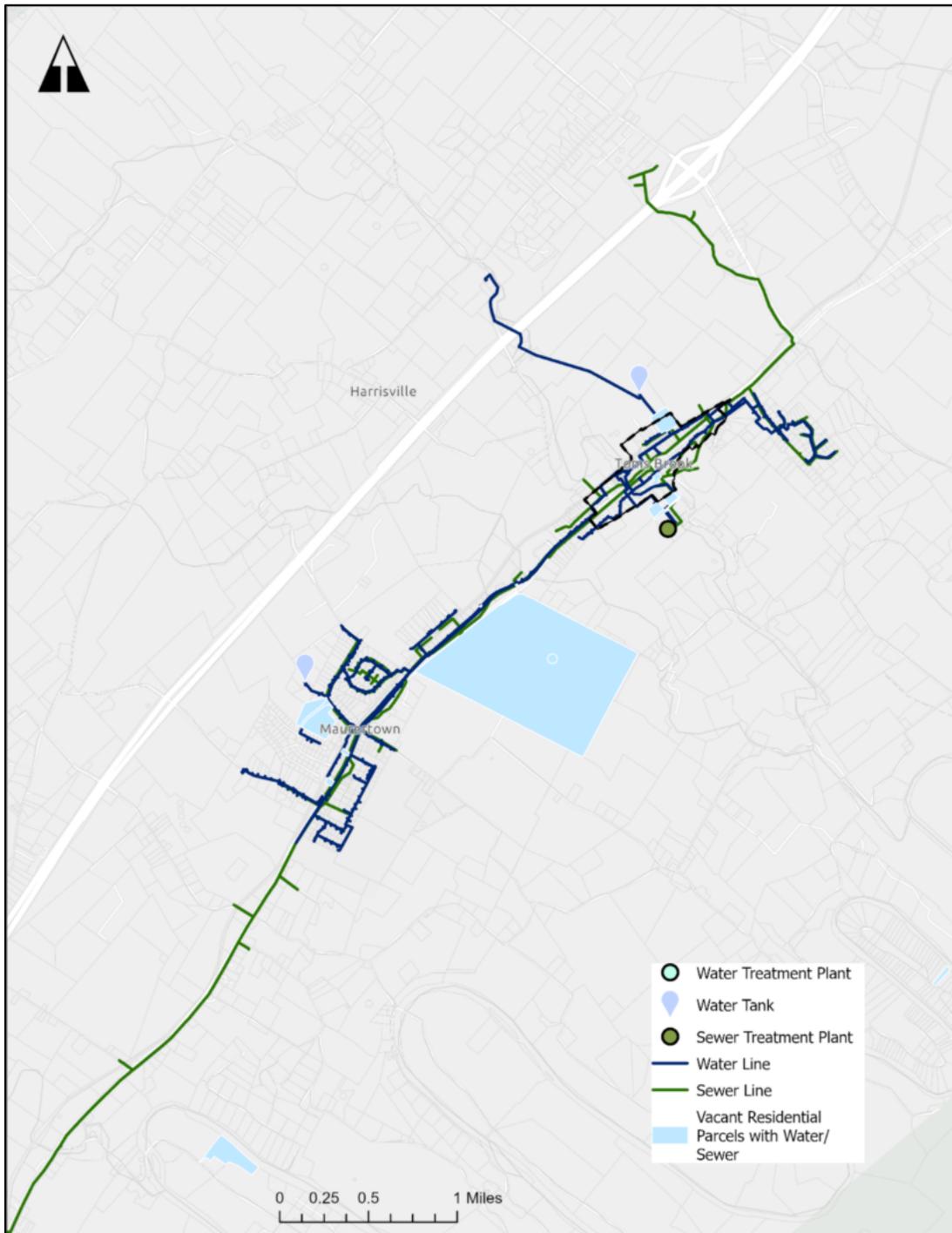
Map 5. Basye and Bryce Resort Area Water & Sewer Coverage



Source: Shenandoah County GIS, Shenandoah County Assessor's Data

One of the most well-served parts of Shenandoah County, in terms of water and sewer utilities, is the Basye area near Bryce Resort. Multiple water tanks, two water treatment plants, and one sewer treatment plant serve the resort, as well as many short-term rentals in the area.

Map 6. Vacant Parcels with Water/Sewer Access - Maurertown



Source: Shenandoah County GIS, Shenandoah County Assessor

Further analysis reveals the location of the vacant residential parcels with water/sewer access, some of which are within close distance of Maurertown.

Outside the incorporated towns, utility infrastructure is largely located along U.S. 11, near Toms Brook and Maurertown, and in the southwest area of the county near Basye. Larger-scale development outside pre-served areas can be especially difficult, causing development to follow a sprawled pattern based on where water and sewer hookups are available.

Recommendations

These recommendations have been created by analyzing existing conditions within the county and its communities and various perspectives on constraints to new production of dwelling units. Some of the recommendations, such as reducing lot sizes or increasing height limits while updating the zoning ordinance, are not exhaustive of every change that should be followed by Shenandoah County and Woodstock in their respective ordinances (or by other Towns in the region) to provide more housing units. Transparency, engagement, and community collaboration can allow Shenandoah County communities to begin implementing the comprehensive plan.

The matrix following the recommendations simplifies the steps that Shenandoah County and the Town of Woodstock can take over the next decade to begin to produce more housing units. While some efforts will take more complex coordination and time to achieve, others can start immediately.

Recommendations for Shenandoah County

Allow for mixed-use buildings to serve as “building blocks” for growing hamlets and villages.

Historically, main streets incorporated a mix of building types, including single-family detached and attached, commercial buildings, and commercial buildings with rooms or apartments above. Modern classification of different residential building types into single-family attached, detached, or multifamily comes from the adoption of zoning codes in the early 20th century. Therefore, the “building blocks” of core town main streets, or small hamlets, are typically historic buildings that do not conform to the current rules and cannot legally be rebuilt. Allowing new development to build mixed-use buildings, which create space for commercial uses and residential uses to co-exist on the same property, can help fulfill the county’s vision to provide new housing opportunities, use land more efficiently to preserve countryside, and make main streets and hamlets more vibrant. Shenandoah County’s Zoning Ordinance does not currently set an allowable path for mixed-use buildings to be constructed. It is highly recommended that the County explore reintroducing this “old way” of building to provide new

housing opportunities as well as boost local economies within established, built-up areas where public services are already available. This can be achieved in various ways, depending on community feedback.

Establish a definition for a “mixed-use building” with additional regulations located inside a zoning district, such as R-3, B-1, or B-2.

OR

Create a new Mixed-use Zoning District that outlines new requirements, expecting re-zoning applications to the new district to accommodate the proposed uses.

While the separated uses for buildings such as multifamily residential or commercial are subject to geometric and parking requirements that greatly space them out, the new district or additional regulations for mixed-use development can provide greater flexibility, particularly in targeted areas. This strategy enables the community to see how mixed-use buildings can be building blocks for a more vibrant main street area.



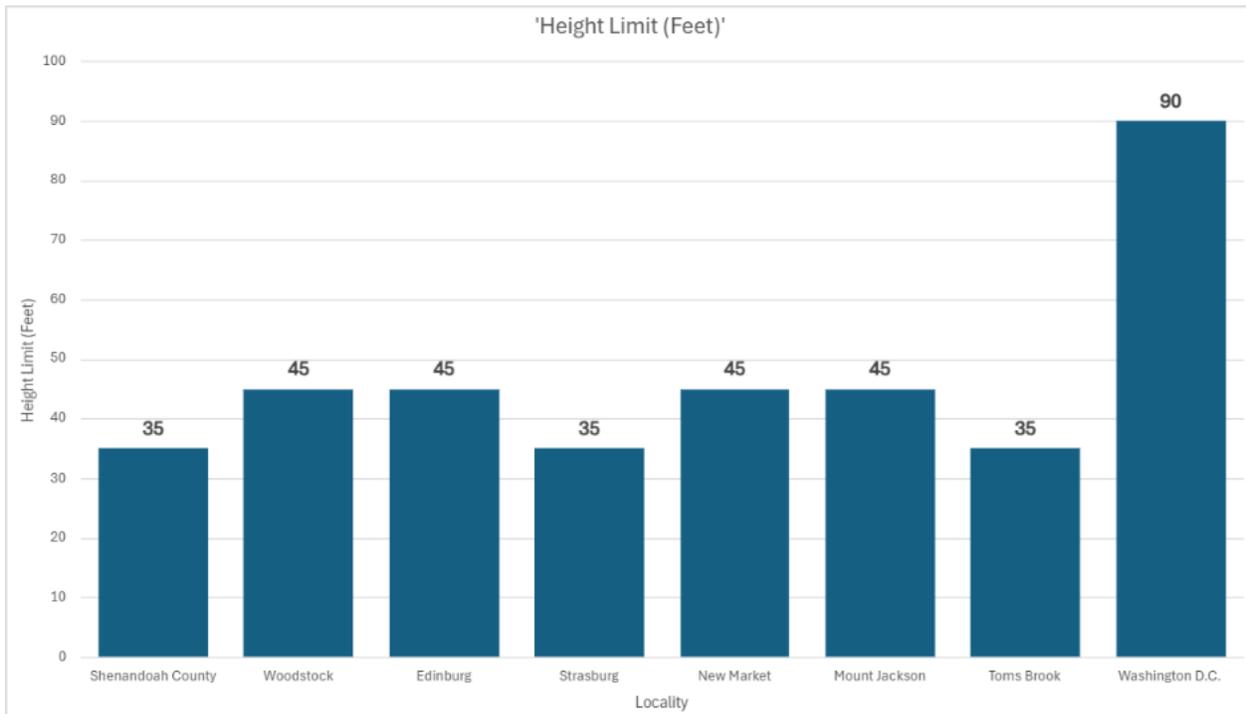
All types of housing will be needed to assist in affordability, but pursuing this recommendation will make it easier to provide the “building blocks” of bringing more housing units online and supporting better growth of hamlets and towns.

Actions:

- Conduct a study related to how mixed-use buildings should best be accommodated in Shenandoah County, as well as where they would be allowed per zoning regulations.
- Once implemented, continue to support and encourage the development of these building types as part of the overall strategy to deliver new housing units.

Consider increasing height limits to 45-60 feet in R-3 or new mixed-use zoning districts.

Current height limits in Shenandoah County cap residential structures at either 35 or 45 feet, which is typical across many jurisdictions in the commonwealth. As Shenandoah County is adjacent to the Washington, D.C., metropolitan statistical area (MSA), its height limit per the federal Height Act has been included solely for context. Similar to Shenandoah County, Washington, D.C., faces challenges with affordability, and there is much debate and studies conducted over whether this height limit constrains the supply of housing.¹² The federal Height of Buildings Act of 1910 controlled the new increasing heights of buildings due to new construction technology such as reinforced concrete and steel. Building height was limited to the width of the right of way the property sat on, and in much of D.C., a building may only be 90 feet tall. Larger right-of-way widths allow for taller buildings, but even the lowest cap under this ordinance shows how much space there is for an increase within Shenandoah County or its communities before reaching what is typical in the nearest large city.



In much of Washington, D.C., zoning further restricts building heights. Between a 90-foot height limit (i.e., approximately nine or 10 stories) and Shenandoah’s 2-3 ½ story height restrictions, there is room for a modest increase in height that would not drastically change the character of the area. Historically, before height limits were imposed, the market and available building technology would determine building height. Historic buildings, such as 118 S. Main St. in

¹² Austermuhle, Martin. 2019. “Low Skyline, High Prices: Would Taller Buildings Help Make Housing Cheaper In D.C.?” WAMU, December 17. <https://wamu.org/story/19/12/17/low-skyline-high-prices-would-taller-buildings-help-make-housing-cheaper-in-d-c/>.

Woodstock, approaches the limit. Further down U.S. 11 in Harrisonburg, 5 S. Main St. greatly exceeds the height of neighboring buildings while adding historic character to the community. These types of buildings were constructed in the early 1900s, around the same time that the federal Height of Buildings Act of 1910 was adopted. When the first zoning ordinances were adopted in Shenandoah County and its adjacent communities, these types of developments were restricted due to the height limit.



While height limits are not a guarantee of affordability, they do affect what type of development is possible. A modest increase of 10-20 feet could add an additional floor onto allowable buildings, which given the size of the project, could add more units. To provide units at a larger scale, the ordinances of Woodstock and Shenandoah County currently encourage more horizontal, shorter development patterns that visually take up more of the local horizon, whereas taller buildings would allow for views of the natural landscape from the buildings and save space around a community by allowing more compact development.

One way this increase could be achieved without changing the height of other districts is to create a new “planned mixed use” district. This area could have flexible geometric requirements in exchange for allowing mixed-use buildings aligned with the County’s goal of creating vibrant downtown core development. Alternatively, the allowed building height of the R-3 high-density residential district could be increased to allow for more units in areas already being targeted for higher-density residential development when applying for a rezoning. As this is currently only 0.2% of the total acreage of the county overall, it still greatly limits the potential impacts of increased heights.

Often, the height of new buildings generates safety concerns around the available length of ladder-trucks and other related Fire & Rescue services. However, new research shows that modern buildings, with improved fire suppression technology, are safer than single-family and older multifamily buildings when looking at fire-related fatalities. Technology such as sprinklers, new materials, and compartmentation requirements have greatly improved the fire safety of new multifamily buildings.¹³ With other changes at the state level on the horizon, such as the potential allowing of single staircase construction¹⁴, more parcels could be available for development.

Actions:

- Conduct a study related to increasing height limits.
- Based on recommendations, draft an amendment to existing zoning districts, or as part of new districts, or if considered “special uses,” such as a mixed-use building, draft new ordinance text that increases height limits.

Expand public facilities only to expand capacity where growth is targeted.

This study focuses specifically on targeting areas where housing development is appropriate and recommends ways to increase production. Traditionally, the predominant view in planning and development has been to extend utilities and create new areas of residential development on undeveloped properties adjacent to historically built-up areas with the idea that new residents would bring new market opportunities and revenue for the town. However, as automobiles and related infrastructure have expanded, the economic center of communities has left the historic downtown core and concentrated around the nearest highway exits. For example, Reservoir Road in Woodstock shows this pattern between I-81 and U.S. 11 where fast-

¹³ Clifford, Liz, Seva Rodnyansky, and Alex Horowitz. 2025. “Modern Multifamily Buildings Provide the Most Fire Protection.” Pew Research, September 30. <https://pewtrsts.org/3KazfZr>.

¹⁴ Woods, Charlotte Rene. 2025. “Can One Stairwell Help Solve Virginia’s Housing Crisis? Lawmakers Think so • Virginia Mercury.” *Virginia Mercury*, February 28. <https://virginiamercury.com/2025/02/28/can-one-stairwell-solve-virginias-housing-crisis-lawmakers-think-so/>.

food chains and drive-throughs are located. This style of development can be thought of as “urban sprawl,” describing the horizontal growth patterns common throughout suburban and exurban communities in the United States. Such sprawl patterns often form low-density residential areas with segregated land uses and homogenous populations.¹⁵

While urban sprawl does contribute tax revenue to the community, there is a hidden long-term cost. Infrastructure, such as roads, water, and sewer, have a cost for extension that can be calculated down to the per-foot level. If zoning ordinances require every building served by public infrastructure to be spread out, this cost increases greatly compared to the cost of serving buildings with a more compact footprint. Furthermore, the hidden cost of ongoing maintenance over time makes these spread-out service areas increasingly costly.

One way of calculating the efficiency of land use relative to the cost of services is to study the tax value per acre of land. Typically, newer businesses located along car-oriented stretches of a town provide higher tax value than smaller businesses on a downtown main street, but they also occupy far more land. By adjusting for how much each property yields in taxes, downtown main street properties on small lots tend to be much more valuable per acre than businesses with large lots on car-oriented roads. Knowing that maintenance and the extension of public facilities into these areas is costly over time, there is an argument to build more compactly and get more efficient value per square foot out of the town’s land rather than expanding the sprawl. In this study, the towns where utilities already exist are already planned for targeted development with the intention of preserving the countryside. Extending utilities into new areas should be done carefully, since it can encourage sprawl that consumes the countryside, even if it increases housing production. Within designated core areas, vacant sites and underused properties should be prioritized for development or redevelopment at higher densities.

Water use has historically been a concern in the county due to low water levels in the Shenandoah River causing frequent water rationing advisories. This situation is acknowledged in the Shenandoah County Comprehensive Plan under the visionary topic area “Water is Life.” Studies have shown that sprawl development patterns and utilities extension can lead to increases in per-capita rates of outdoor water use while higher-density development patterns can lead to lower outdoor water use.¹⁶ One case study exemplifying this revealed that average household water consumption decreased year over year from the 1960s through the 2000s as residential lot sizes decreased. In 1968, average lot sizes reached a height of approximately 11,000 square feet with an average daily water use of over 800 gallons of water per household

¹⁵ Heidari, Hadi, Mazdak Arabi, Travis Warziniack, and Sybil Sharvelle. 2021. “Effects of Urban Development Patterns on Municipal Water Shortage.” *Frontiers in Water* 3 (July). <https://doi.org/10.3389/frwa.2021.694817>.

¹⁶ Ibid.

per day. By 1983, the average lot size had decreased to under 8,000 square feet. Along with the decrease in size, the average daily water usage dropped to 600 gallons of water per household per day.¹⁷ Outdoor water use often accounts for half or more of all residential water demand.¹⁸¹⁹²⁰ On a per-household basis, multifamily buildings use half as much outdoor water as single-family homes.²¹ Reducing household consumption through the need to maintain landscaping can be one part of reducing overall water usage, which is important in times of drought. Maintaining the current extent of the infrastructure system and building compactly as the Comprehensive Plan recommends can help save on infrastructure costs and contribute to conserving water use.

Actions:

- Focus and plan for only expanding infrastructure capacity in targeted areas, rather than planning utility expansion into new areas that are not currently served.

Establish Transfer of Development Rights (TDR).

Shenandoah County's Comprehensive Plan (pg. 42) identifies sending and receiving areas for a Transfer of Development Rights (TDR) program. The Town of Woodstock's Comprehensive Plan (pg. 127) identifies the entire boundaries of the community as a potential receiving area for a future program. This sets up the potential for formally establishing a TDR program that effectively preserves the rural landscape while building in core areas. TDR programs are a useful tool that communities can use to directly communicate the benefits of density while prioritizing preservation. By allowing this direct relationship to indefinitely preserve land while addressing housing needs or boosting the local economy, the public can understand the relationship between targeted growth and preservation of the agricultural economy. The Code of Virginia §15.2-2316.2 outlines the requirements for establishing a TDR ordinance, which is the next step for introducing this tool.

Appropriate incentives and a transfer ratio determining the number of development credits received per acre protected, amount of prime agricultural soil preserved, dollar value of the land, or other factors can determine how many additional units a developer could receive per

¹⁷ Western Resource Advocates. n.d. "Urban Sprawl: Impacts on Urban Water Use." Accessed October 16, 2025. <https://cwagaz.org/images/Reports/RefLib/SWChapter4.pdf>.

¹⁸ Hanak, Ellen, and David Neumark. n.d. *California Economic Policy*.

¹⁹ Emrath, Paul, and National Association of Homebuilders. 2017. *Residential Water Use*. October.

²⁰ Denver Water. n.d. "Water Use." Denver Water. Accessed October 28, 2025.

<https://www.denverwater.org/your-water/water-supply-and-planning/water-use>.

²¹ Hanak, Ellen, and David Neumark. n.d. *California Economic Policy*.

credit purchased. Guidelines should be made clear so that local staff can communicate between landowners and developers where land is being preserved and why a density bonus is being given.

Combined with efforts to diversify the types of housing available and other ordinance changes, this can provide more units in closer proximity to walkable areas. For example, a new mixed-use building may purchase the right to develop additional units if acreage in rural Shenandoah County is preserved. This becomes more possible if modest increases to height of structures are allowed.

Actions:

- Study the adoption of a Transfer of Development Rights program, including all necessary stakeholders, such as any participating land conservation foundation or other organization to facilitate the preservation of land.
- Once adopted, communicate and provide frequent updates as to the program’s progress in consolidating growth where targeted and preserving the rural landscapes.

Create a new zoning district for hamlets and villages with reduced lot size minimums

It is recommended that the County should create a new district (which could be restricted to within a geographic limit of each identified hamlet) for smaller lots. As an example, neighboring Frederick County’s zoning ordinance includes a Residential Performance District that is intended to create a mix of quality housing types within its Urban Development Area. While Frederick County’s context is different because they are part of the Washington, D.C., metro area and their designated Urban Development Area covers a large area, the intention to create a mix of housing and walkability matches Shenandoah County’s goals for its hamlets, villages, and towns.

Frederick County, Virginia – Residential Performance District

Type of House	Minimum Lot Area (sq. ft.)
Single-family detached urban	12,000
Single-family detached cluster	8,000
Single-family detached zero lot line	6,000
Single-family small lot	3,750
Multiplex (3 to 4 dwellings)	3,000
Townhouse	1,500
Garden apartments	(Other dimensional req.)
Multifamily Residential	(Other dimensional req.)

In Frederick County, the minimum lot area for a single-family detached urban house within a Residential Performance District area is 12,000 square feet (or a little over a quarter acre). In this zoning ordinance, the minimum lot sizes for single-family detached zero lot line houses, single-family small lot houses, multiplexes, and townhouses in Frederick County's Residential Performance District areas are much lower than the 10,000-square-foot minimum for Shenandoah County's R-3 High Density Residential and R-4 Rural Growth Residential districts. Moreover, these lot sizes are well above historic urban lot sizes, which could be 2,000 square feet or lower for single-family detached or attached homes, triplexes, and quadplexes. Within targeted locations in the county's towns, a district permissive of even smaller lot sizes could help improve the local economy and housing opportunities.

Actions:

- Study and create a new zoning district for Shenandoah County's hamlets and villages, preferably one that is uniform across each of these targeted areas to keep the rules consistent and easy to understand.
- Adopt the new district, communicating its approach to the public and how over time it will provide new housing and economic opportunities for these areas.

Recommendations for Woodstock

Consider an informational campaign to build community trust through communicating the benefits of increased density in targeted areas.

The community's housing affordability crisis is clearly acknowledged in both the Shenandoah County and Town of Woodstock comprehensive plans. This crisis is not unique to the county and is shared across the entire commonwealth. Due to planning efforts, development proposals looking to provide more diverse types and sizes of housing have already started to form. In recent years, Woodstock has approved new types of housing units and has made amendments to its zoning ordinance allowing new types of development. However, some of the latest proposed projects have faced community opposition due to concerns including traffic and tree canopy coverage, among other issues. While it is difficult to predict the potential negative effects of new development, it is possible to look at examples of how denser places function and quantify the need for new housing within the community. Woodstock and the county's other towns can collaborate to communicate the benefits of new growth and development to the community. By strategies such as displaying economic benefits, storytelling and humanizing issues of housing affordability, and otherwise connecting community members with the plan to develop new housing in targeted areas, the planning and development process can be held with less conflict and more focus on negotiation to ensure the best outcomes for the community.

Case Study Example

- Building trust takes time, but there are ways that towns in Shenandoah County, such as Woodstock, can provide opportunities for residents to be meaningfully involved in planning efforts. As part of Harrisonburg’s zoning ordinance update, the City Council appointed an Ordinance Advisory Committee, consisting of 14 community members.²² This committee has met four times publicly, with recorded meetings and presentations available for the public to review. The Committee “represents the broader community, reviews draft ordinances, serves as a sounding board for new ideas and solutions, and provides constructive input.”²³ Each meeting, the Committee was briefed by both the hired consultants and the City’s staff on the progress of the zoning ordinance update, and key topics were brought up as discussion topics. These discussions were around “hot button” issues such as residential densities, housing types, and accessory dwelling units. During the discussions, members of the Committee were given opportunities to ask questions of staff and consultants and voice their concerns. This effort was supported by public surveys, hearings, and public events that made the zoning ordinance update’s intent accessible to residents of Harrisonburg.

Actions:

- When updating the zoning ordinance, or outside ordinance changes when new development is proposed, continue to situate the conversation or review within the context of plans to address the housing crisis and build more vibrant downtown cores.
- Utilize local newsletters or other social media channels to “re-highlight” the Comprehensive Plan vision or how recent development approvals are working to meet the goals.

Consider intentional updates to Woodstock’s zoning ordinance.

Woodstock’s zoning ordinance, like many others across Virginia, is due for an update that reflects its newly adopted Comprehensive Plan. This update should include the variety of changes mentioned in the Comprehensive Plan. Streamlining the development review process, allowing for flexibility in design and type of housing, allowing accessory dwelling units, reducing dimensional requirements, and other changes may lead to the creation of new units in the town. Woodstock’s current zoning map features a density gradient that has the majority of the land zoned as low-density residential. However, to “look inward” rather than outward for

²² City of Harrisonburg. n.d. “Zoning and Subdivision Ordinance Update - Ordinance Advisory Committee (OAC) | City of Harrisonburg, VA.” Accessed November 17, 2025. <https://www.harrisonburgva.gov/zoning-oac>.

²³ Ibid.

growth, the Town could begin to prioritize growth and density throughout the town limits while still preserving the rural landscape outside town. Some of these low-density residential areas could be rezoned for higher density in a new district, or the “bar” for low-density could be raised while even more density is allowed in other districts.

It is recommended that the Town considers updating or editing various aspects of its zoning ordinance in order to align with the comprehensive plan’s goals and allow more diverse and compact housing development in targeted growth areas. Aspects of the ordinance that could be revisited include:

Intent

The intent of many zoning districts could be updated to reflect more contemporary language regarding intended development. For example, R-2 Medium Density Residential includes the language: “The regulations of this district are designed to stabilize and protect the essential characteristics of the district and to promote and encourage a suitable environment for family life where there are children.” With the exception of more car-oriented districts, there are families that live in all zoning districts in Woodstock, and they are all ideally suitable for family life. The history of zoning in all communities throughout the United States explains the story of why ordinances were weighing in on the definition of a family or what environments are ideal for children, but today communities are more aware of the negative impacts of further separating themselves out by race or by income group. This language may imply that higher-density environments are bad for children and that the lower the density, the more conducive to family life. Woodstock community members have expressed through the Comprehensive Plan engagement process that walkability, more accessible and vibrant shopping areas, and an affordable cost of living with good amenities are most desired from new development. Achieving this vision and goals requires density, proximity to amenities, and mixed-used development in the town’s target growth areas.

Uses

Further separating multifamily uses into triplex, quadplex, or higher units can better support developing multifamily dwellings on parcels where the footprint is similarly sized to a large single-family house parcel but can house more people. This “missing middle” type of units is not common in the town, and all multifamily “stacked” or townhome dwellings must receive a special use permit in the R-3 High Density Residential zone despite it being the highest-density zone.

Minimum Lot Size

Across most of the districts, lot sizes are substantially larger than historic lot patterns. Lot sizes are a minimum of 10,000 square feet for single-family units and 6,000 square feet for town homes, courtyard homes, and duplexes. This means areas closer to established, built-up areas will likely not have large-enough parcels to allow for high-density structures. Historic homes show that even a lot smaller than 2,000 square feet could be sufficient for a home of a decent size. Even modest decreases in the minimum lot size requirements could provide more units and allow crucial development on parcels near downtown.

Setbacks

In the R-3 district, structures must be set back a minimum of 30 feet if the right of way of a street is 50 feet or greater in width, or 50 feet if the street is less than 50 feet in width. This is a large distance that, especially in more historic or built-up areas, takes up much of a given parcel. Historic homes, shops, or mixed-use buildings with apartments above shops are built throughout Woodstock's core and just outside the downtown at distances less than 30 feet and, in some cases, to the lot line with 0 feet of setback. Setbacks were introduced alongside the infrastructure for automobiles and utilities. However, in a place that is looking to pedestrianize, create more local economic development opportunities, and create new housing, this space could be better utilized.

Minimum Lot Width

In the R-3 district, the minimum width of a lot is 75 feet. Two-family duplex units are allowed a minimum of 37 ½ feet at the setback line and 47 ½ feet for corner units. Many historic units in the district that predate these width requirements sit on much smaller lots. In a district that prioritizes density, decreasing minimum lot widths could allow this space to be more efficiently utilized.

Yards

In the R-3 district, side yards must be at least 6 feet in width each and 15 feet in total for both sides, and rear yards must be a minimum of 35 feet. Courtyard homes are allowed to have a zero-foot yard on one side if the opposite side is 10 feet. Combining yard requirements with width, frontage, minimum lot size, and setback requirements, buildings are required to be spread far apart despite the R-3 district being the highest-density district for residential uses in the town. Loosening these yard requirements could allow this space to be more efficiently used for additional units.

Maximum Building Coverage and Height

In the R-3 district, the maximum building coverage is 40%, and the maximum building height is 35 feet. Historic homes or businesses that predate these requirements often cover up to as much as 80% of a lot with height limits being set only by available construction materials and technology. Loosening coverage requirements, particularly in critical areas such as downtown or adjacent R-3 zoned areas, may allow space in these areas to be more efficiently used for housing.

Parking Regulations

Per Sec. 90-387, all residential districts require, either in a private garage or on the lot, two parking spaces for each single-family dwelling unit in a new building (and for each dwelling unit added to an existing building). The requirement is the same for two-family and multifamily structures. In the R-3 district, parking can be provided in the side or rear yard but may not be closer than 5 feet to the property line. Loosening parking requirements on residential lots (e.g., decreasing the requirement to just one parking space per unit) may allow space currently reserved for parking to be more efficiently utilized for more housing. With Americans increasingly becoming less interested in car ownership^{24,25}, jobs being created locally, and the ShenGo Transit system being continually improved, there may be demand for housing units in higher-density areas, even if they do not include designated off-street parking.

Many of these regulations were created for ease of administration and predictability, but their side effects may limit the potential use and vibrancy of key areas that the community is looking to densify and create new opportunities for. Re-examining the role these dimensional requirements play in development may lead to more flexible and varied opportunities.

Case Study Examples

- Harrisonburg currently permits a variety of housing types in many residential zoning districts throughout the city. Even lower-density districts such as the R-2 Residential District permit duplex units and accessory dwelling units, while higher densities such as R-3 permit attached townhouses of eight units, duplexes, and multifamily buildings of

²⁴ Nicholson-Messmer, Elijah. 2025. "Nearly Half of Young Americans Don't Want to Own a Car." Autoblog, January 16. <https://www.autoblog.com/news/nearly-half-of-young-americans-dont-want-to-own-a-car>.

²⁵ Carbonaro, Giulia. 2025. "Americans Are Losing Interest in Buying a Car." Newsweek, May 4. <https://www.newsweek.com/americans-losing-interest-buying-car-2066151>.

up to 12 (with a special use permit).²⁶²⁷ However, the City is currently working to increase the residential density of most of its residential zoning districts by increasing allowable densities in many of its districts, based on recommendations from its Comprehensive Plan.²⁸

- The City of Petersburg is currently updating its zoning ordinance to permit housing infill throughout the city. One of the most notable changes is to the existing R-3 ‘Two-family Residence’ district. This district is distributed throughout the historic downtown core as well as bordering some of the newer neighborhoods from the 20th century. The current zoning for R-3 permits low-density single-family detached units as well as duplex (two-family) units, with significant setback requirements and large minimum lot sizes.²⁹ The new district standards drastically reduce setback requirements as well as minimum lot area standards for all residential uses permitted within the district. Additionally, the new R-3 district allows townhouses, as well as triplexes and quadplexes.³⁰ The intent of this district states, “The R-3 District is established to support residential neighborhoods located in and around the downtown area, where housing is typically organized in a historic grid pattern. The R-3 District accommodates a mix of housing types, including single-family homes, townhouses, duplexes, triplexes, and quadplexes, promoting a walkable, neighborhood-scaled environment. Infill and redevelopment opportunities should reinforce the urban form through minimal setbacks and building forms that are consistent with the surrounding area. Non-residential uses should complement the existing residential living patterns.”³¹

²⁶ City of Harrisonburg. n.d. “ARTICLE I. - R-2 RESIDENTIAL DISTRICT | Code of Ordinances | Harrisonburg, VA | Municode Library.” Accessed November 17, 2025. https://library.municode.com/va/harrisonburg/codes/code_of_ordinances?nodeId=PTIITHCOGEOR_TIT10PLDE_C H3ZO_ARTIREDI.

²⁷ City of Harrisonburg. n.d. “ARTICLE J.2. - R-3 MEDIUM DENSITY RESIDENTIAL DISTRICT | Code of Ordinances | Harrisonburg, VA | Municode Library.” Accessed November 17, 2025. https://library.municode.com/va/harrisonburg/codes/code_of_ordinances?nodeId=PTIITHCOGEOR_TIT10PLDE_C H3ZO_ARTJ.2MEDEREDI.

²⁸ City of Harrisonburg. n.d. “Zoning and Subdivision Ordinance Update Project Fact Sheet.” Accessed November 17, 2025. <https://www.harrisonburgva.gov/sites/default/files/community-development/Zoning%20and%20Subdivision%20Ordinance%20Update%20Project%20Fact%20Sheet.pdf>.

²⁹ City of Petersburg. n.d. “ARTICLE 8. - ‘R-3’ TWO-FAMILY RESIDENCE DISTRICT REGULATIONS | Code of Ordinances | Petersburg, VA | Municode Library.” Accessed November 17, 2025. https://library.municode.com/va/petersburg/codes/code_of_ordinances?nodeId=PTIICO_APXBZO_ART8TMIREDIR E.

³⁰ City of Petersburg, and Berkeley Group. 2025. “Petersburg Draft-Ordinance---1162025.” November 16. <http://www.petersburg-va.org/DocumentCenter/View/9088/Draft-Ordinance---1162025?bidId=>.

³¹ Ibid.

Table 4-7. R-3 District Standards.

		R-3
LOT AREA (MIN)³³		
	Dwelling, Single Family	2,500 SF
	Dwelling, Duplex	5,000 SF
	Dwelling, Triplex or Quadplex ³⁴	5,000 SF
	Dwelling, Townhouse	1,000 SF
	Non-Residential	5,000 SF
LOT WIDTH (MIN) ³⁵		
	Dwelling, Single Family	25'
	Dwelling, Duplex	25'
	Dwelling, Townhouse	18'
	Dwelling, Triplex or Quadplex	30'
	Non-Residential	50'
SETBACKS (MIN) ³⁶		
	Front	0'
	Side (townhouse, interior)	0'
	Side (townhouse, end unit)	5'
	Side (single family, duplex, triplex, quadplex)	5'
	Rear	15'
LOT COVERAGE (MAX)		
	All Lots	85%

Figure. Petersburg R-3 District Standards

Actions:

- Initiate an “audit” of Woodstock’s zoning ordinance to adopt more pro-housing regulations reflective of the Comprehensive Plan’s guidance.
- Establish a Zoning Advisory Council and public engagement around the update to clearly communicate and invite public comments on future proposed changes as a result of the audit.

Implementation Matrix

Shenandoah County	Recommendation	Expected timeframe
	Allow for mixed-use buildings	Short Term
	Consider increasing height limits	Short Term
	Expand public facilities only where targeted	Long Term
	Establish Transfer of Development Rights (TDR) program	Long Term
	Create a new zoning district for hamlets with reduced lot size minimums	Medium Term
Woodstock and other Towns	Recommendation	Expected timeframe
	Establish/participate in future Transfer of Development Rights (TDR) program	Long Term
	Create on-going education workshops and engagement opportunities to build trust and facilitate communication	Ongoing, begin Short Term
	Update Woodstock’s zoning ordinance	Short-to-Medium Term

Short Term (1-2 Years), Medium Term (2-3 Years), Long Term (3-5 Years)

Conclusion

Shenandoah County and the Town of Woodstock are poised to respond to community members' housing needs through strategic development aligned with the goals contemplated in each of their comprehensive plans. Shenandoah County's new Comprehensive Plan, adopted in September 2024, emphasizes the importance of preserving the rural landscape and character of the county while actively supporting growth within its existing towns, villages, and hamlets. Woodstock's new plan, adopted in January 2025, is about "looking inward rather than outward" to intentionally accommodate growth within the town.

This report outlines the characteristics of Shenandoah County's households and housing units, analyzes market dynamics across rental and owner-occupied housing, identifies key market gaps and development constraints, and recommends specific development priorities and regulatory strategies to support development. The analysis and recommendations in this report are informed by the input and experiences of local stakeholders and are intended to complement the goals imagined in the comprehensive plans for Woodstock and the county.

Homeowner vacancy rates and home sale trends suggest that the strongest homebuyer demand in Shenandoah County is currently concentrated in Strasburg, New Market, Maurertown, and Woodstock, where vacancy rates are low and homes sell quickly. Strasburg, Woodstock, and New Market show the strongest rental demand in the county. While these towns show the highest demand right now, demand could expand or shift toward other towns and CDPs in the county if investments were made in developing the infrastructure, services, and amenities needed to support development.

Gaps in the market include affordable workforce housing, small (one- and two-bedroom) units, and new and upgraded units. Introducing new, affordable rental and for-sale options to the market may help to ease the financial strain of a portion of the 4,574 housing cost-burdened households in the county and may help local employers to attract and retain workers. Introducing smaller units may allow small households, including many retired and aging households, to affordably downsize within the community. Based on the needs of the community, development priorities should include affordable rentals for low-income households, affordable starter homes, senior housing, higher-end homes, and mixed-use development.

Based on the analysis of infrastructural and regulatory barriers to developing high-priority housing, recommendations for the County include supporting mixed-use downtown development, increasing height limits, strategically expanding public facilities, establishing Transfer of Development Rights, and creating new districts with reduced lot size minimums.

Recommendations for Woodstock include updating the zoning ordinance and developing an informational campaign to build trust, prepare residents for potential denser development, and communicate the benefits that strategic increased density will have for all community members.

There is strong demand for housing throughout Shenandoah County, and each of its towns, villages, and hamlets has the potential to accommodate growth and serve the housing needs of its residents. Through intentional and strategic development and regulatory decisions, Woodstock and the County can realize the visions laid out in their comprehensive plans of vibrant downtowns and affordable, high-quality housing for the entire community.

Appendices

Appendix A: Town Commuting Patterns

Edinburg Commuting Patterns

Edinburg is part of a larger commute shed that includes other Shenandoah County towns, some counties immediately surrounding Shenandoah, and some counties in the D.C. area.

There are 579 workers who live in Edinburg. Of these, 559 (97%) commute outside the town for work. Many work elsewhere within Shenandoah County, including Woodstock (17% of all out-commuters), Columbia Furnace (7%), and Mount Jackson (6%). Other residents either travel to nearby Frederick County (5%), Warren County (5%), Rockingham County (5%), or Winchester (4%), or they travel east to work in the D.C.-area counties of Loudoun (5%), Fairfax (7%), or Prince William (3%).

There are 792 workers employed within Edinburg. Of these, 772 (98%) live outside the town and commute in for work. Many of these workers commute from elsewhere in Shenandoah County, such as Woodstock (4%) or Mount Jackson (3%). Others commute from nearby Rockingham County (6%), Augusta County (5%), or Frederick County (4%), or from farther locations, like Roanoke County (3%).

There is a significant mismatch between the workforce living within Edinburg and the jobs within the town. Ninety-seven percent of workers living in the town commute outside it for work, and 98% of workers employed within Edinburg commute in from out of town. The median incomes of workers in the top 10 in-commuter and top 10 out-commuter occupations by employment are similar, indicating that housing prices alone may not be driving this mismatch. Out-commuter households may prefer the sizes, styles, and types of housing units available within Edinburg (and the inverse for in-commuters). Additionally, some workers may make housing decisions based on external factors such as a spouse’s occupation or a child’s school.

Top 10 In- and Out-Commuter Occupations and Incomes

In-Commuters			Out-Commuters		
Occupation (<i>Num. Commuters</i>)		Median Income	Occupation (<i>Num. Commuters</i>)		Median Income
Meat, Poultry, and Fish	117	\$38,753	Cashiers	64	\$28,842
Sales Representatives of Services	37	\$63,032	Retail Salespersons	59	\$32,052

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Food Processing Workers	32	\$35,852	Fast Food Workers	55	\$25,698
Packaging Machine Operators	25	\$40,353	Stockers and Order Fillers	41	\$36,172
Production Workers	16	\$35,053	General and Operations Managers	26	\$88,869
Home Health Aides	13	\$29,244	First-Line Supervisors of Retail Sales Workers	20	\$43,936
Inspectors, Testers, Sorters, Samplers, and Weighers	13	\$44,800	Office Clerks, General	18	\$37,566
Supervisors of Production and Operating Workers	7	\$66,539	Postsecondary Teachers	16	--
Supervisors of Mechanics, Installers, and Repairers	6	\$74,537	Business Operations Specialists, All Other	13	\$61,371
Maintenance and Repair Workers, General	6	\$43,079	Police and Sheriff's Patrol Officers	12	--

Source 6. Lightcast Occupation Table, Q2 2025 Dataset

Mount Jackson Commuting Patterns

Mount Jackson is part of a larger commute shed that includes other Shenandoah County towns, some counties immediately surrounding Shenandoah, and some counties in the D.C. area.

There are 793 workers who live in Mount Jackson. Of these, 676 (85%) commute outside the town for work. Many work elsewhere within Shenandoah County, including Woodstock (12% of all out-commuters), Columbia Furnace (6%), and Edinburg (3%). Other residents either travel to nearby Frederick County (4%), Warren County (3%), Rockingham County (7%), or Winchester (4%), or they travel east to work in the D.C.-area Loudoun County (3%) or Fairfax County (7%).

There are 1,499 workers employed within Mount Jackson. Of these, 1,382 (92%) live outside the town and commute in for work. Some of these workers commute from elsewhere in Shenandoah County, such as Woodstock (4%) or New Market (2%). Others commute from nearby Rockingham County (15%), Harrisonburg (5%), or Page County (8%).

There is a significant mismatch between the workforce living within Mount Jackson and the jobs within the town. Eighty-five percent of workers living in the town commute outside it for work, and 92% of workers employed within Mount Jackson commute in from out of town.

The median incomes of workers in the top 10 in-commuter and top 10 out-commuter occupations by employment are generally similar, indicating that housing prices alone may not be driving this mismatch. Out-commuter households may prefer the sizes, styles, and types of housing units available within Mount Jackson (and the inverse for in-commuters). Workers in a few common out-commuter occupations (e.g., registered nurses, software developers) have

median salaries that are notably higher than those of common in-commuter occupations. This pattern could indicate that some workers employed within Mount Jackson cannot find affordable housing options within the town, or some workers employed outside Mount Jackson prefer the size, style, type, or price of housing within the town. Additionally, some workers may make housing decisions based on external factors such as a spouse’s occupation or a child’s school.

Top 10 In- and Out-Commuter Occupations and Incomes

In-Commuters			Out-Commuters		
Occupation (Num. Commuters)	Num. Commuters	Median Income	Occupation (Num. Commuters)	Num. Commuters	Median Income
Heavy Truck Drivers	72	\$49,867	Fast Food Workers	24	\$25,704
Home Health Aides	49	\$29,244	Janitors and Cleaners	23	\$30,762
Assemblers and Fabricators	32	\$37,512	Waiters	23	\$30,906
Packaging Machine Operators	26	\$40,353	Registered Nurses	20	\$84,996
Supervisors of Production and Operating Workers	24	\$66,521	Nursing Assistants	17	\$37,367
Inspectors, Testers, Sorters, Samplers, and Weighers	24	\$44,807	Postsecondary Teachers	11	--
Industrial Machinery Mechanics	21	\$62,463	Software Developers	10	\$140,788
Stockers and Order Fillers	16	\$36,207	Secretaries and Administrative Assistants	7	\$41,038
Industrial Truck and Tractor Operators	16	\$64,339	Retail Salespersons	6	\$31,951
Cashiers	16	\$28,781	Accountants and Auditors	5	\$75,194

Source: Lightcast Occupation Table, Q2 2025 Dataset

New Market Commuting Patterns

New Market is part of a larger commute shed that includes other Shenandoah County towns, some counties immediately surrounding Shenandoah, and some counties in the D.C. area.

There are 695 workers who live in New Market. Of these, 635 (91%) commute outside the town for work. Many work elsewhere within Shenandoah County, including Woodstock (7% of all out-commuters) and Mount Jackson (5%). Many other residents either travel to nearby Rockingham County (10%) or Winchester (3%), or they travel east to work in the D.C. area’s Fairfax County (11%) or Loudoun County (4%).

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There are 679 workers employed within New Market. Of these, 619 (91%) live outside the town and commute in for work. Some of these workers commute from elsewhere in Shenandoah County, such as Woodstock (3%) or Mount Jackson (2%). Many commute from nearby Rockingham County (27%), Page County (14%), or Harrisonburg (9%).

There is a significant mismatch between the workforce living within New Market and the jobs within the town. Ninety-one percent of workers living in the town commute outside it for work, and 91% of workers employed within New Market commute in from out of town. The median incomes of workers in the top 10 in-commuter and top 10 out-commuter occupations by employment are generally similar, indicating that housing prices alone may not be driving this mismatch. Out-commuter households may prefer the sizes, styles, and types of housing units available within New Market (and the inverse for in-commuters). Workers in a few common out-commuter occupations (e.g., managers, registered nurses, accountants) have median salaries that are notably higher than those of common in-commuter occupations. This pattern could indicate that some workers employed within New Market cannot find affordable housing options within the town, or some workers employed outside New Market prefer the size, style, type, or price of housing within the town. Additionally, some workers may make housing decisions based on external factors such as a spouse’s occupation or a child’s school.

Top 10 In- and Out-Commuter Occupations and Incomes

In-Commuters			Out-Commuters		
Occupation (Num. Commuters)		Median Income	Occupation (Num. Commuters)		Median Income
Meat, Poultry, and Fish	91	\$38,753	Retail Salespersons	31	\$32,014
Nursing Assistants	42	\$37,513	Stockers and Order Fillers	14	\$36,190
			General and Operations		
Fast Food and Counter Workers	29	\$25,692	Managers	12	\$88,989
Food Processing Workers	24	\$35,852	Registered Nurses	11	\$85,152
Packaging Machine Operators	19	\$40,354	Military-only occupations	10	0
Maintenance and Repair			Heavy and Tractor-Trailer		
Workers, General	13	\$43,172	Truck Drivers	9	\$49,859
Teaching Assistants, Except			First-Line Supervisors of		
Postsecondary	13	\$27,615	Retail Sales Workers	7	\$44,575
Secondary School Teachers	12	\$54,221	Office Clerks, General	6	\$37,669
Elementary School Teachers	12	\$54,017	Cashiers	6	\$28,804
Inspectors, Testers, Sorters,					
Samplers, and Weighers	11	\$44,803	Accountants and Auditors	6	\$75,562

Source: Lightcast Occupation Table, Q2 2025 Dataset

Strasburg Commuting Patterns

Strasburg is part of a larger commute shed that includes other Shenandoah County towns, some counties immediately surrounding Shenandoah, and some counties in the D.C. area.

There are 3,159 workers who live in Strasburg. Of these, 2,912 (92%) commute outside the town for work. Many work elsewhere within Shenandoah County, including Woodstock (7% of all out-commuters) and Mount Jackson (5%). Many other residents either travel to nearby Frederick County (15%), Winchester (12%), or Warren County (10%), or they travel east to work in the D.C. area’s Fairfax County (9%), Loudoun County (6%), or Prince William County (4%).

There are 1,412 workers employed within Strasburg. Of these, 1,165 (83%) live outside the town and commute in for work. Some of these workers commute from elsewhere in Shenandoah County, such as Woodstock (3%). Many commute from nearby Frederick County (12%) or Warren County (7%).

There is a significant mismatch between the workforce living within Strasburg and the jobs within the town. Ninety-one percent of workers living in the town commute outside it for work, and 91% of workers employed within Strasburg commute in from out of town. The median incomes of workers in the top 10 in-commuter and top 10 out-commuter occupations by employment are generally similar, indicating that housing prices alone may not be driving this mismatch. Out-commuter households may prefer the sizes, styles, and types of housing units available within Strasburg (and the inverse for in-commuters). Workers in a few common out-commuter occupations (e.g., managers, software developers) have median salaries that are notably higher than those of common in-commuter occupations. This pattern could indicate that some workers employed within Strasburg cannot find affordable housing options within the town, or some workers employed outside Strasburg prefer the size, style, type, or price of housing within the town. Additionally, some workers may make housing decisions based on external factors such as a spouse’s occupation or a child’s school.

Top In- and Out-Commuter Occupations and Incomes

In-Commuters			Out-Commuters		
Occupation (<i>Num. Commuters</i>)		Median Income	Occupation (<i>Num. Commuters</i>)		Median Income
Paper Goods Machine Operators	28	\$56,714	Retail Salespersons	109	\$32,005
			General and Operations		
Production Workers	14	\$35,058	Managers	85	\$88,975

Coating, Painting, and Spraying					
Machine Setters, Operators	12	\$46,021	Fast Food Workers	81	\$25,696
Machinists	8	\$58,300	Waiters and Waitresses	67	\$30,936
Securities, Commodities, and					
Financial Services Sales Agents	5	\$46,859	Cashiers	65	\$28,807
Tellers	3	\$37,254	Home Health Aides	60	\$29,244
Production Workers	2	\$34,832	Stockers and Order Fillers	58	\$36,187
Cabinetmakers, Carpenters	2	\$39,777	Software Developers	58	\$140,690
Shuttle Drivers and Chauffeurs	1	\$31,902	Janitors and Cleaners	57	\$30,745
			Laborers and Movers	56	\$35,984

Source: Lightcast Occupation Table, Q2 2025 Dataset

Toms Brook Commuting Patterns

Toms Brook is part of a larger commute shed that includes other Shenandoah County towns, some counties immediately surrounding Shenandoah, and some counties in the D.C. area.

There are approximately 113 workers who live in Toms Brook. Of these, 100% commute outside the town for work. Many work elsewhere within Shenandoah County, including Woodstock (14% of all out-commuters), Edinburg (4%), and Mount Jackson (4%). Many other residents either travel to nearby Frederick County (10%), Winchester (8%), or Warren County (9%), or they travel east to work in the D.C. area’s Fairfax County (3%), Loudoun County (6%), or Prince William County (6%).

There are approximately 13 workers employed within Toms Brook. Of these, 100% live outside the town and commute in for work. Some of these workers commute from elsewhere in Shenandoah County, such as Strasburg. Others commute from Frederick County; Warren County; Berkeley County, West Virginia; and other Virginia counties.

There is a significant mismatch between the workforce living within Toms Brook and the jobs within the town. One hundred percent of workers living in the town commute outside it for work, and 100% of workers employed within Toms Brook commute in from out of town. There is too little income and employment data available to make assumptions about why these workers choose to live inside or outside Toms Brook. Some workers employed within Toms Brook cannot find affordable or available housing options within the town, or some workers employed outside Toms Brook may prefer the size, style, type, or price of housing within the town. Additionally, some workers may make housing decisions based on external factors such as a spouse’s occupation or a child’s school.

Top In- and Out-Commuter Occupations and Incomes

In-Commuters			Out-Commuters		
Occupation (Num. Commuters)		Median Income	Occupation (Num. Commuters)		Median Income
Cashiers	62	28830	Retail Salespersons	15	31998
First-Line Supervisors of Retail Sales Workers	8	45539	Elementary School Teachers	10	--
			General and Operations Managers	9	89073

Source: Lightcast Occupation Table, Q2 2025 Dataset

Appendix B: Literature Review and Stakeholder Input on Short-Term Rentals

In Shenandoah County, short-term rentals (STRs) and “homeshares” with four or less bedrooms are allowed by right with an annual zoning permit in most districts, including C-1 Conservation, A-1 Agriculture, R-1 Low Density Residential, R-2 Medium Density Residential, R-3 High Density Residential, R-4 Rural Growth Residential, and B-1 Local Business/B-2 General Business. STRs with more than four bedrooms, as well as non-dwelling rentals (e.g., tiny homes, RVs), require a special use permit and are limited to C-1, A-1, R-1, and B-1/B-2 districts. All permitted STRs must comply with §165-32.4 of the Code of Shenandoah County, which details safety and health department standards, parking standards, 50-foot setback requirements for non-dwellings, a 5% Transient Occupancy Tax requirement, and business registration requirements.³²

Research on STRs, and specifically on their impacts in rural areas, identifies a mix of benefits (e.g., accommodation for tourists, income for owners, tax revenue) and costs (e.g., housing availability and affordability issues, nuisances for residents) for the community. Shenandoah County may experience these impacts as a rural tourist destination with a growing STR market.

Housing Market Effects

In a study on the impacts of Airbnb listings on rents and home sale prices, Barron et al. find that a 1% increase in active listings correlates to a 0.018% (\$9) rent increase and a 0.026% (\$1,800) sale price increase within the zip code.³³ The study finds that these effects are related to the reallocation of the housing supply, as an increase in Airbnb listings does not increase the overall supply of housing, but simply decreases the supply of long-term rental units in the area. In an analysis of the Hampton Roads area of Virginia, Safari et al. similarly investigate the impacts of STRs on housing prices nearby.³⁴ The study finds the effects to be localized within a small area around the home, with an additional active Airbnb listing within 300 meters of a home correlating to a 0.36% increase in sale price, and a listing 300-500 meters from the home correlating to only a 0.08% increase. Additionally, the study finds that nearby Airbnb listings have a stronger impact on prices for higher-priced homes, with homes priced at the 40th percentile and below seeing more minimal effects. While these studies do not specifically focus

³² Shenandoah County. (n.d.). Short Term Rental FAQ PDF.

<https://www.shenandoahcountyva.gov/DocumentCenter/View/1450/Short-Term-Rental-FAQ-PDF>

³³ Barron, K., Kung, E., Proserpio, D. (2021). The Effect of Home-Sharing on House Prices and Rents: Evidence from Airbnb. *Marketing Science* 40(1), 23-47. <https://doi.org/10.1287/mksc.2020.1227>

³⁴ Safari, N., Zhang, L. & Komarek, T.M. (2025). The impact of short-term rental activity on house prices: evidence from coastal Virginia. *The Annals of Regional Science*, 74. <https://doi.org/10.1007/s00168-024-01328-4>

on small rural towns, their findings may be relevant to the impacts of STRs on housing prices in rural markets like Shenandoah County.

In a study specifically focused on characterizing and comparing STRs in urban and rural areas of Virginia, Choi & Won find rural STRs to have higher survival probabilities (i.e., rural STRs tended to be active for longer periods of time than urban STRs).³⁵ Additionally, STRs in rural Virginia towns were more likely than those in urban areas to be full-time STRs (as opposed to occasional STRs or partial STRs). Because they make up a more stable and permanent part of the market, the impacts of STRs in rural areas are different from those in urban areas, and they may require different regulatory strategies. If the cost, location, size, and other characteristics of STR units align with the preferences and needs of households seeking year-round housing in the area, they may contribute to housing affordability and accessibility issues, putting pressure on the market and increasing housing costs for permanent residents. However, if the characteristics of STRs in the area meet a different set of needs and preferences specific to tourists, the presence of these units may not put the same pressure on the market for permanent residents.

STR activity can contribute to tighter housing markets for year-round residents in rural tourism hubs. In a study on the Bear Lake area (including Rich County, Utah, and Bear Lake County, Idaho) Theophilus & Ulrich-Schad find that locals perceive rapid STR expansion to reduce the stock of housing available to year-round residents.³⁶ Local residents perceive that much of the new development in the area is intended specifically for short-term renting, making it difficult for the year-round workers who sustain the area's tourism industry to find housing. Some local business owners express difficulties hiring and keeping workers due to a lack of available and affordable workforce housing in the area.

Community Effects

STRs often fill a lodging gap in rural areas that cannot sustain large hotels, supporting increased tourism spending.³⁷³⁸³⁹ DiNatale et al. report that among small towns in Oregon with

³⁵ Choi, S., & Won, J. (2023). Exploring the Survival Mechanisms of Short-Term Rentals in Virginia: A Comparative Analysis of Rural versus Non-Rural Markets. *Sustainability*, 15(16), 12651. <https://doi.org/10.3390/su151612651>

³⁶ Theophilus, A., Ulrich-Schad, J.D. (2025). "Your neighbors are new every week": short-term rentals, housing, and community wellbeing in high-amenity rural places, *Popul Environ*, 47. <https://doi.org/10.1007/s11111-025-00508-4>

³⁷ DiNatale, S., Lewis, R., Parker, R. (2018). Short-term rentals in small cities in Oregon: Impacts and regulations. *Land Use Policy*, 79, 407-423. <https://doi.org/10.1016/j.landusepol.2018.08.023>.

³⁸ Airbnb (2019). Beyond Cities: How Airbnb Supports Rural Revitalization. https://press.airbnb.com/wp-content/uploads/sites/4/2019/06/Beyond-Cities_Global-Report.pdf

³⁹ Theophilus, A., Ulrich-Schad, J.D. (2025). "Your neighbors are new every week": short-term rentals, housing, and community wellbeing in high-amenity rural places, *Popul Environ*, 47. <https://doi.org/10.1007/s11111-025-00508-4>

population sizes similar to Shenandoah County's, the highest-earning STR listings produce roughly \$12,000-\$17,000 in annual revenue per listing, and local officials state that STRs increase tax revenues and attract tourism. A report from Airbnb shows that a larger share of active Airbnb listings is located in rural areas (18.4%) than hotel rooms are (12.5%), emphasizing that STRs play a particularly important role in tourist accommodation outside cities.

The literature shows that permanent residents of small rural municipalities may perceive nuisances associated with STRs in their communities (e.g., parking issues, noise, clutter and garbage, and high occupancy levels) as well as negative effects on community cohesion, such as STR guests acting carelessly toward the community and out-of-state STR owners not reinvesting into the community.⁴⁰⁴¹

Shenandoah County Stakeholder Input

Local stakeholders in Shenandoah County, including STR owners, real estate agents, and developers, consistently comment on the significant role STRs have played in the county's housing market over recent years. Stakeholders perceive that STRs surged in popularity during the COVID-19 pandemic, especially in Basye, where investors rapidly purchased properties (sometimes sight-unseen) to convert into vacation rentals. Outside just Basye, stakeholders explain that some homeowners throughout the county rent their basements and build accessory dwelling units as STRs to offset homeownership costs, and local banks and credit unions have increasingly accepted potential STR income for loan qualification, making them more financially feasible.

Stakeholders report that this growth in the STR market in Shenandoah County has displaced some long-term renters (as landlords have opted to convert long-term rentals into STRs) and caused property prices to increase, anecdotally pricing out many local workers (specifically in Basye). Stakeholders emphasize that STRs are important for supporting tourism, but policy should both incentivize these tourism benefits and work to maintain housing affordability for year-round residents.

⁴⁰ DiNatale, S., Lewis, R., Parker, R. (2018). Short-term rentals in small cities in Oregon: Impacts and regulations. *Land Use Policy*, 79, 407-423. <https://doi.org/10.1016/j.landusepol.2018.08.023>.

⁴¹ Theophilus, A., Ulrich-Schad, J.D. (2025). "Your neighbors are new every week": short-term rentals, housing, and community wellbeing in high-amenity rural places, *Popul Environ*, 47. [https://doi.org/10.1007/s11111-025-00508-](https://doi.org/10.1007/s11111-025-00508-4)