Purpose

This chapter sets the stage for planning in Dublin by examining pertinent existing conditions, demographic and market conditions, existing fiscal condition, regional setting, existing regulations, past plans and studies.

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02 COMMUNITY PROFILE

Dublin is a city on the move. The City evolved from a small farming and stone quarrying village to an increasingly significant national and global commerce node, while maintaining its historic charm and unique character. Several Native American cultures lived in the region before European settlers made their way to the Scioto River. Modern roots can be traced back to around 1803 when Ludwig Sells and his sons chose the site along the Scioto River for its high ground, abundant resources, and farming potential. Although the area was originally named after Dublin, Ireland, its early settlers were predominantly German and other European descent. Its economy initially revolved around water-powered mills and quarrying, paving the way for Dublin to become an agricultural hub on U.S. Route 161.

While Dublin was a quiet farming town for much of the twentieth century, it transformed into a suburban business center in the 1970s. A facility for Ashland Chemical Company, I-270, and Muirfield Village Golf Club put Dublin on the map. The location, proximity to the City of Columbus, infrastructure, and attractive historic downtown helped Dublin attract hundreds of businesses during this period of growth.

Dublin's success today can be attributed to its ability to blend its history with a continuous look towards the future. The historic downtown remains the City's cultural center, while the Bridge Street District represents a newer mixed-use activity hub for the community. Attractive residential neighborhoods define many areas of Dublin and significantly contribute to the overall character of the community. The city is abundant with parks and open spaces, trails and paths, and public art and cultural offerings. Tree lined thoroughfares connect all areas of Dublin, providing a network for access to neighborhoods, employment areas, recreation, and commerce.

Dublin is well-positioned to capitalize on new growth and opportunities as an established city. Several parcels of undeveloped land within the city limits and large vacant parcels in the extraterritorial planning area are available for new development to meet the needs of this growing community. Its proximity to Columbus, a leading research university, and connections to significant transportation infrastructure make Dublin attractive to national corporations and businesses with global reach. As it looks confidently towards the future, Dublin embraces its heritage while evolving into an important national and international community.

REGIONAL SETTING

Dublin is located in Central Ohio 11 miles northwest of Columbus on the I-270 loop highway. The City has a population of approximately 50,000 and straddles parts of Franklin, Delaware, and Union Counties. Dublin is part of the Columbus Metropolitan Area, a 10-county region with a population of approximately 2.1 million and one of the fastest-growing metropolitan areas in the Midwest.
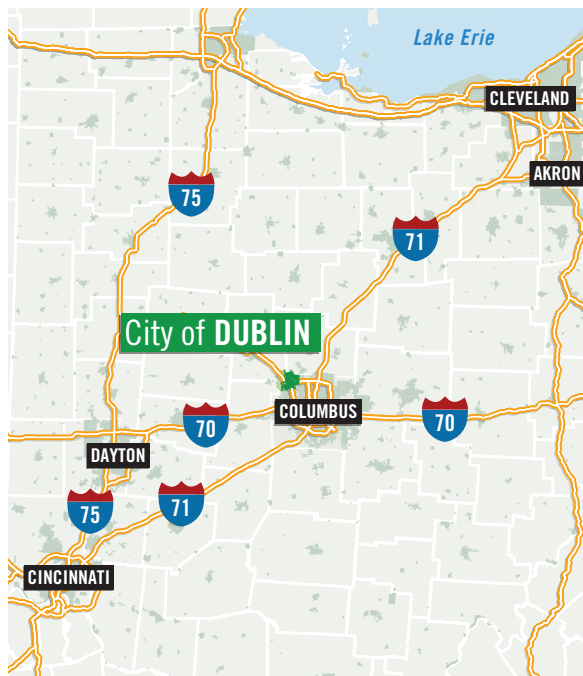
The City is bordered to the West by Plain City, to the north by Jerome Township and Shawnee Hills, to the northeast by Powell, and to the east and southeast by Columbus. The I-270 loop highway curves through the southeast corner of the City and state highways 33 and 161 traverse the City east to west. The community's growing population and economic importance are elevating its role in Central Ohio.

PLANNING AREA

The planning boundary depicted in the map below indicates the area under the planning jurisdiction of the City of Dublin. Building off the 2013 Community Plan with updates to the western extent, the planning area extends beyond the existing City of Dublin boundaries and into adjacent unincorporated areas in order to inform compatible land uses, growth boundaries, and the provision of infrastructure. The planning area primarily consists of the existing municipal boundary and smaller unincorporated areas, as well as the large potential western growth area that extends into portions of Jerome Township in Union County, the unincorporated portions of Madison County and Franklin County north of Dublin's boundary with the City of Columbus, and west to the Heritage Rail Trail corridor.

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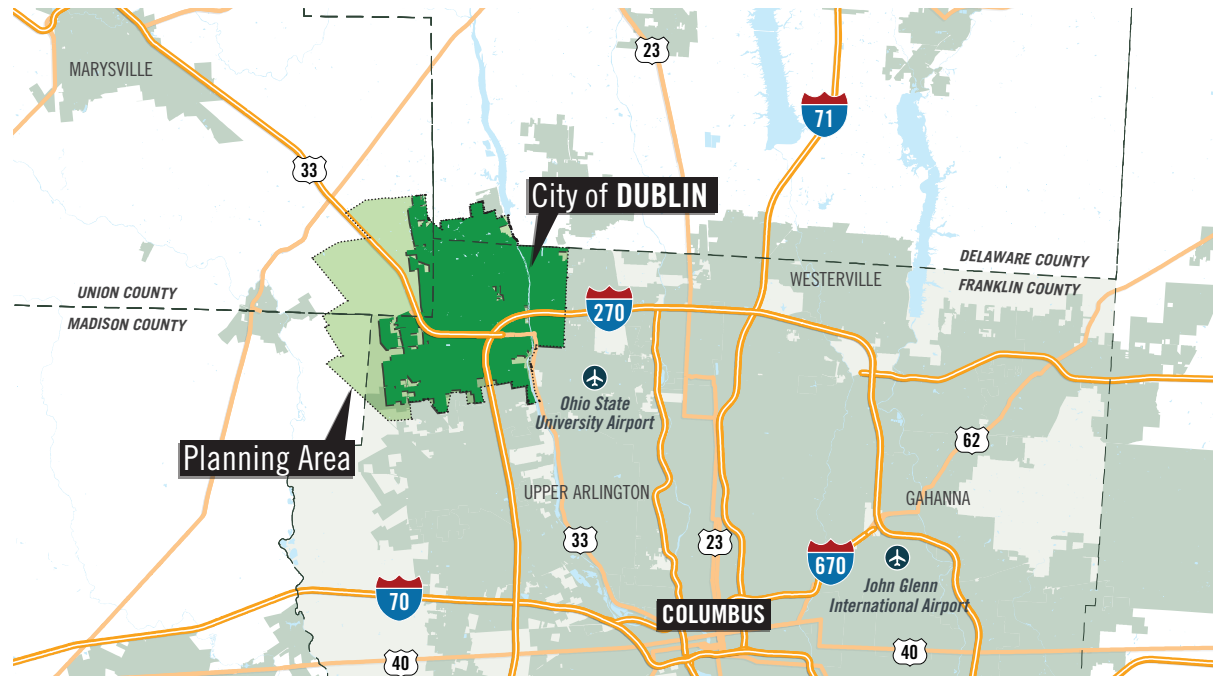
EXISTING LAND USE

All parcels within the City of Dublin and its planning area were categorized into one of 13 land use types. The existing land use inventory is based on data the City collected and verified through a reconnaissance survey conducted in 2023 and a digital aerial review. The existing land use inventory helped identify growth patterns and analyze existing conditions based on current market and demographic conditions. Detailed analysis of existing conditions can be found in the Existing Conditions Memorandum (ECM); meanwhile, the findings and key takeaways from the ECM have informed the development of *Envision Dublin*.

Land Use Categories

- Agriculture
- Single-Family Detached
- Single-Family Attached
- Multifamily
- Mixed-Use
- Commercial
- Hotel and Lodging
- Office
- Industrial
- Public and Semi-Public
- Parks and Open Space
- Transportation and Utilities
- Undeveloped

Context Layers

- City of Dublin
- Planning Area Boundary
- River
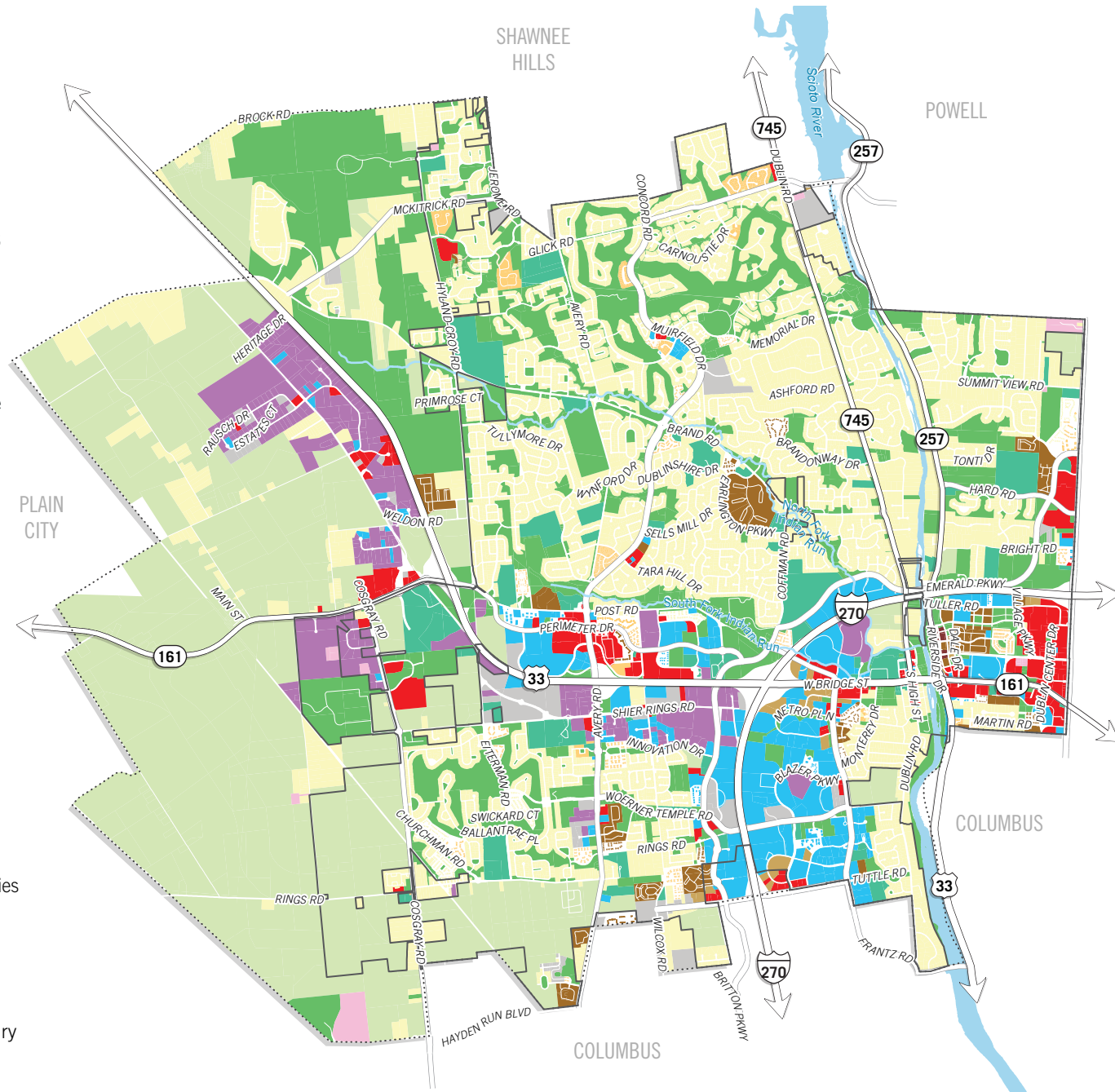
DEMOGRAPHIC SNAPSHOT

The Demographic Snapshot assesses the existing demographic characteristics of Dublin. The snapshot helped guide the planning process to ensure *Envision Dublin* reflects accurate demographic data and addresses existing trends, issues, and opportunities.
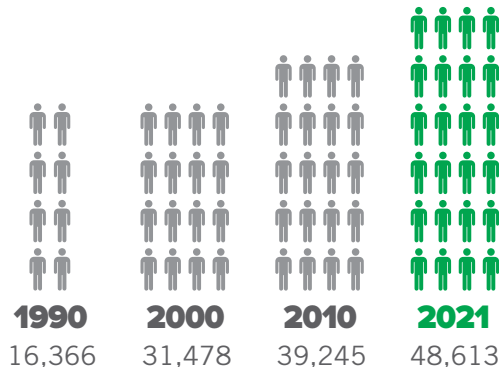
POPULATION

The current population of Dublin is approximately 48,613 people—up 60% from 2000. In recent years, the City's growth has outpaced that of Franklin County and the Columbus metropolitan area. From 2000 to 2010, Dublin's population grew by 24.7% or 7,767 whereas Franklin County grew by 6.7% and the Columbus metropolitan area grew by 11.5%. From 2010 to 2021, Dublin's population increased by 23.9% or by over 9,000 people, again outpacing Franklin County and the Columbus metropolitan area. Dublin is one of the faster growing communities in one of the fastest growing metropolitan areas in the Midwest.

AGE

Dublin's senior population is growing faster than surrounding communities and national trends.

The Dublin community is growing older. Based on U.S. Census data, the City experienced a substantial 113% increase in seniors (people aged 65 years and older) since 2010 and a 37% increase in residents aged 55-64. Franklin County and the Columbus metropolitan area show a similar though less rapid growth of residents aged 55 and older. The 35 to 54 age group is the largest in Dublin, making up 33% of the population. This represents a larger proportion of Dublin's population than in Franklin County or the Columbus metropolitan area. The second largest age group in Dublin are residents aged 5 to 19 which makes up 24.5% of the City's population—a proportion larger than in Franklin County or the Columbus metropolitan area. These patterns reflect the aging baby-boomer population and attraction of seniors to the area but also the arrival of new younger residents and both will influence housing and health and senior care infrastructure in the future.

POPULATION GROWTH

Dublin's population has almost tripled since 1990 and has grown by over 9,000 people from 2010-2021

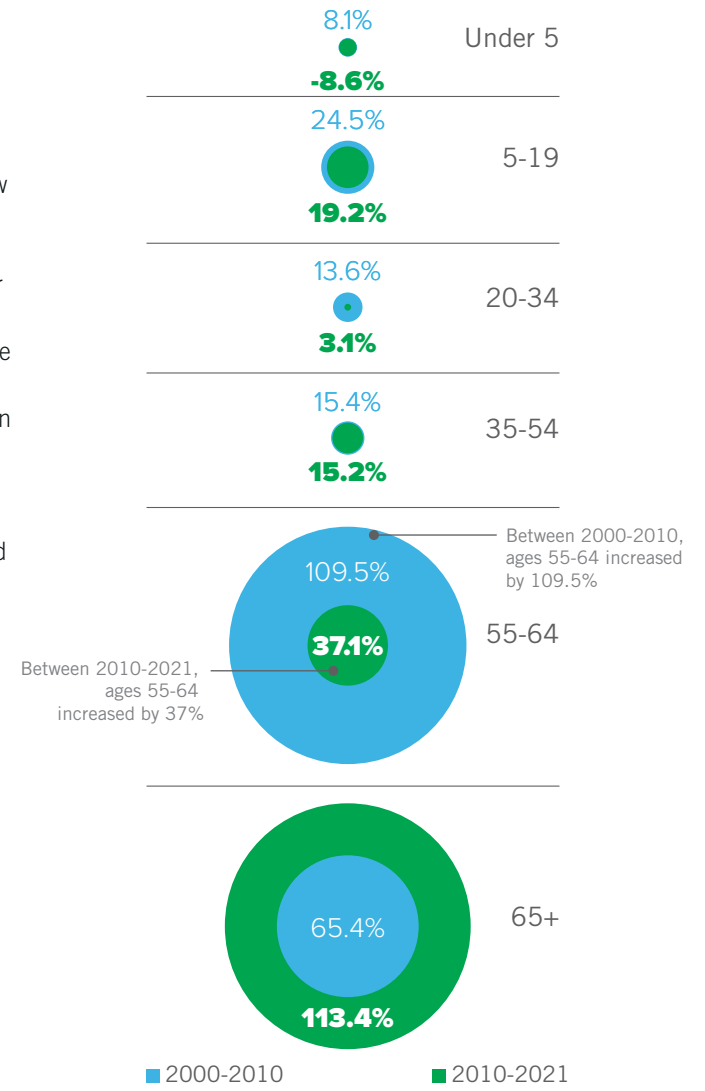**23.9%**
Population increase from 2010-2021

1990	2000	2010	2021
16,366	31,478	39,245	48,613

Source: U.S. Decennial Census

AGE CHANGE OVER TIME
DUBLIN (2000-2021)

Under 5: 8.1% / -8.6%

5-19: 24.5% / 19.2%

20-34: 13.6% / 3.1%

35-54: 15.4% / 15.2%

55-64: 109.5% / 37.1%

Between 2000-2010, ages 55-64 increased by 109.5%

Between 2010-2021, ages 55-64 increased by 37%

65+: 65.4% / 113.4%

■ 2000-2010   ■ 2010-2021

Source: 2000, 2010, and 2021 ACS 5-Year Estimates

RACE AND ETHNICITY

Dublin, like its neighboring communities, is predominantly White but Asian and Pacific Islanders are an increasingly prominent segment of the City's population.

According to the U.S. Census bureau, 72.9% of Dublin residents identify as White, higher than Franklin County but similar to the Columbus metropolitan area. The second largest racial or ethnic group in Dublin are residents who identify as Asian and Pacific Islanders which comprise 19.6% of the City's population, a much higher proportion than in Franklin County or in the Columbus metropolitan area. Conversely, the Dublin's Black and Latino populations comprise smaller portions of the City's population compared to Franklin County and the Columbus Metropolitan area though the City's Latino population has increased by 158.9% since 2010.
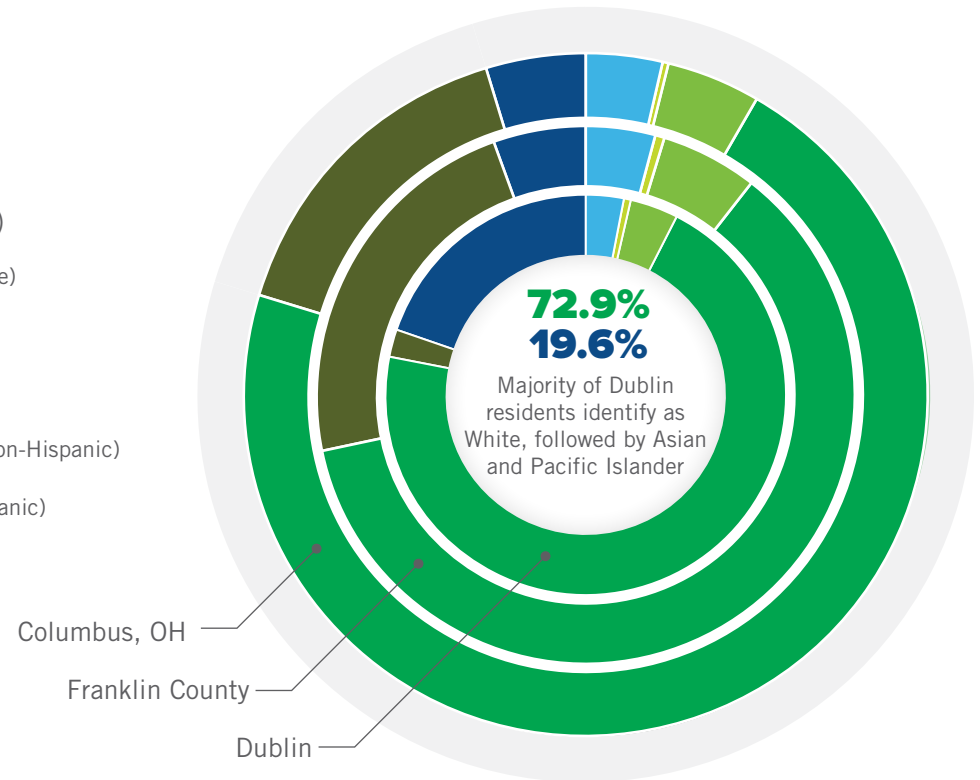
INCOME

The median household income in Dublin is more than double that of the region and is growing.

The median household income for Dublin residents is $145,828. This income group grew by 24.8% between 2000 and 2010 and by 28.8% between 2010 and 2021. The single largest income group are households who earn $150,000 or more, which makes up just under 50% of the City's households. This group has grown by 38.2% since 2010. As such, Dublin's median household income is currently double that of Franklin County and the Columbus MSA.
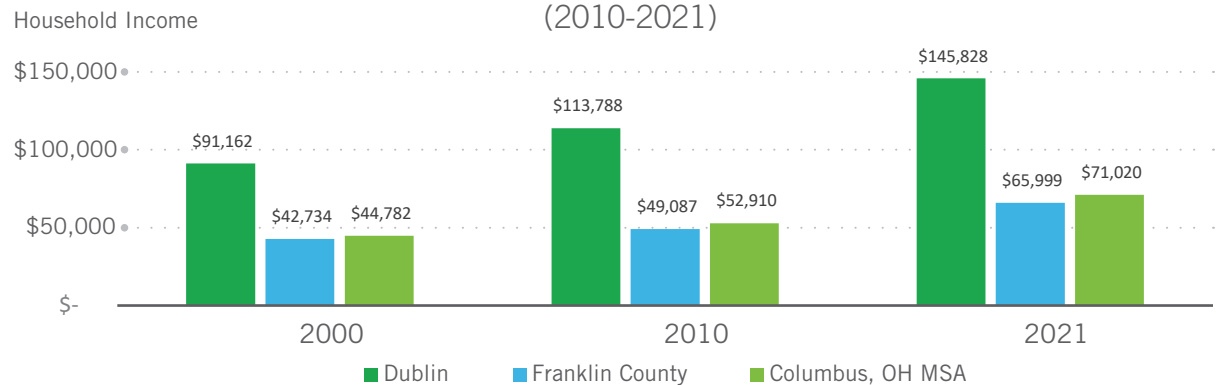
RACIAL AND ETHNIC COMPOSITION (2021)

- Hispanic or Latino (of any race)
  Dublin: 3.8%
- White alone (Non-Hispanic)
  Dublin: 72.9%
- Black (Non-Hispanic)
  Dublin: 2.3%
- Asian and Pacific Islander (Non-Hispanic)
  Dublin: 19.6%
- Two or More Races (Non-Hispanic)
  Dublin: 3.6%
- Other
  Dublin: 0.6%

72.9%
19.6%
Majority of Dublin residents identify as White, followed by Asian and Pacific Islander

Columbus, OH
Franklin County
Dublin

Source: 2021 ACS 5-Year Estimates

MEDIAN HOUSEHOLD INCOMES
(2010-2021)

Household Income

	2000	2010	2021
Dublin	$91,162	$113,788	$145,828
Franklin County	$42,734	$49,087	$65,999
Columbus, OH MSA	$44,782	$52,910	$71,020

Source: 2000, 2010, and 2021 ACS 5-Year Estimates

EMPLOYMENT

The number of primary jobs in Dublin grew by more than 3,600 from 2010 to 2020, or by 8.9%--lower than the 19.9% increase experienced by Franklin County and 17.8% experienced in the Columbus metropolitan area. Of those living in Dublin, 18,651 work outside the City and 3,238 work in the City. 41,492 workers commute into Dublin to work from outside the City.

Most residents work within the **professional, scientific** and **technical services** industries

The **Health Care** and **Social Industry** sector **grew rapidly** between 2010 and 2020

2.2%
is Dublin's current **Unemployment Rate**

REAL ESTATE MARKET TRENDS

Dublin's real estate market is strong for retail, office, and industrial but weaker for multifamily rentals.
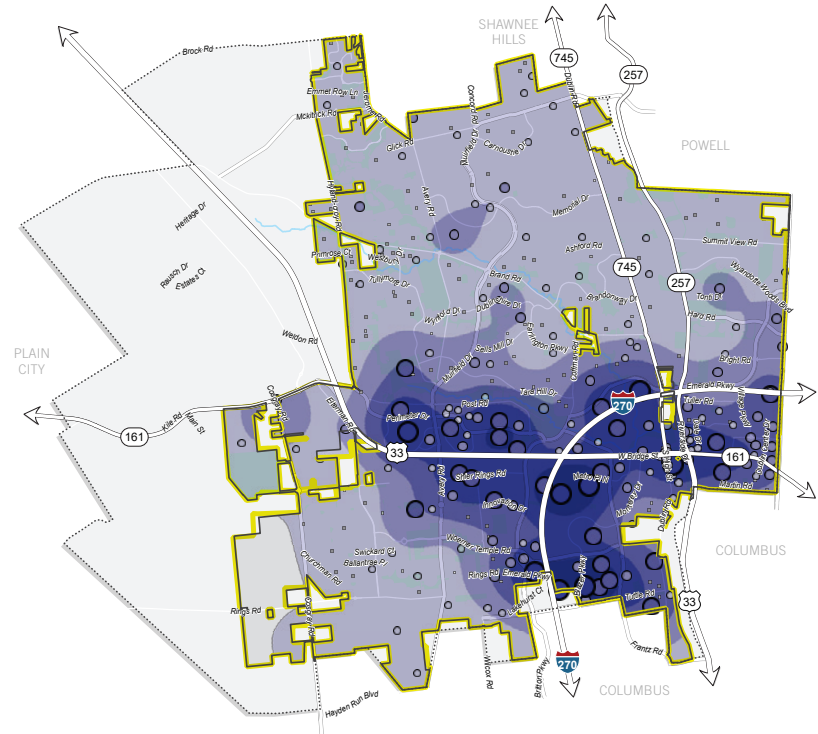
Dublin's multifamily rents and vacancy rates are high compared to the region. Retail rents are slightly above the regional average but their vacancy rate is lower than the regional average suggesting a strong retail real estate market. Office rental rates are stable, near the regional market average but Dublin faces the same office space vacancy challenges as the rest of the region indicating a need to possibly reimagine new uses or functionality for the City's underutilized offices spaces. Industrial rents are rising and vacancy rates declining indicating an area of potential growth.

JOB EMPLOYMENT CENTERS (JOBS/SQ.MILE)

- 5 - 500
- 501 - 2,000
- 2,001 - 4,400
- 4,401 - 7,800
- 7,801 - 12,300

CONTEXT LAYERS

- ☐ City of Dublin
- ⬚ Planning Area boundary

MARKET SNAPSHOT (2023)

- Occupied
- Vacant

$1,485 — 10.6%
Average Multifamily Rent

$21 — 16.5%
Average Office Rent

$19 — 2.5%
Average Retail Rent

$10 — 0.8%
Average Industrial Rent
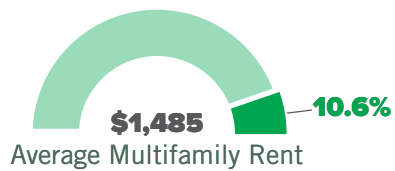
Source: CoStar, Houseal Lavigne

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HOUSING

Most homes in Dublin are owner-occupied, single-family detached units; the City has higher home values and rents and lower vacancies than Franklin County and the Columbus metropolitan area but fewer households experiencing cost burden.

The average household size in Dublin is 2.8 persons, higher than both Franklin County (2.39) and the Columbus metropolitan area (2.49). However, the last decade experienced an increase in the portion of households made up by childless couples from 30.8% in 2010 to 36.4% in 2021. This tracks with national trends. Between Dublin's increasing senior population and this increase in childless couples, there may be a growing disconnect between the existing housing stock and the needs and desires of existing and new residents.

The vast majority of homes in Dublin are single-family detached (70.9%), significantly greater than Franklin County (55.3%) and the Columbus metropolitan area (63.4%). Though much smaller, Dublin's share of single-family attached units is also higher than the region.
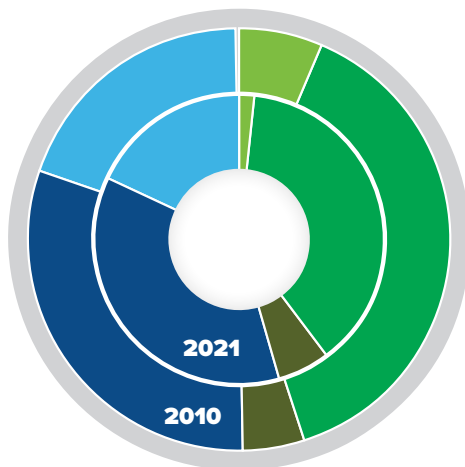
Conversely, Dublin has a lower share of multifamily units than Franklin County and the Columbus metropolitan area. While household sizes has remained steady at 2.8, growth in Dublin's housing stock has been concentrated in larger homes. Between 2010 and 2021, the number of five-bedroom housing units grew by nearly 63% and accounted for 20.5% of new housing. Four-bedroom units accounted for a third of new housing during the same period. This growth in larger units appears to be shifting Dublin's housing stock out of alignment with potential future housing needs. Single-family detached housing will continue to be the predominant housing type in the City however data indicate a need for smaller two- and three-bedroom housing units to right-size housing to household needs.

Housing Study and Strategy

The analysis contained within this section was compared and contrasted with the City's recently completed Housing Study and Strategy. That study examined trends within a broader study area that included the City of Dublin as well as surrounding Census Tracts. As a result of differing geographies, basic data points such as total population or number of households and related growth, differ from the data presented in this memorandum. Overall, the data presented in this Community Plan analysis support the findings of the Housing Study and Strategy.

HOUSEHOLD MAKEUP
DUBLIN (2010-2021)

■ Traditional Families
2010: **38.6%**, 2021: **38.1%**
■ Non-Traditional Families with Children
2010: **4.7%**, 2021: **5.9%**
■ Childless Couples
2010: **30.8%**, 2021: **36.4%**
■ Living Alone
2010: **19.5%**, 2021: **17.8%**
■ Non-Traditional Families with No Children
2010: **6.5%**, 2021: **1.8%**

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HOUSING TYPE FOR OCCUPIED UNITS

70.9%
Single-Family Detached

12.2%
Single-Family Attached

3.4%
2-4 Units

4.4%
5-9 Units

8.5%
10+ Units

Source: 2021, ACS 5-Year Estimates

FISCAL HEALTH

In addition to the current demographic snapshot and inventory of existing land uses, it is also important to understand how Dublin provides quality services and maintains key infrastructures across the City. It helps identify strategies to maximize land uses, preserve the quality of place, and ensure future development provides the necessary investment in and provision of public infrastructure and services for transportation, utilities, parks, recreational facilities, water systems, and public safety. The analysis of factors affecting fiscal health will help evaluate and inform the fiscal impacts of future development and growth, and policies in Dublin. The subsequent chapters in the *Envision Dublin Community Plan* presents how the various factors affecting the fiscal health of the City, and a fiscal impact analysis of various land use scenarios helped informed Dublin's future land use plan, future transportation network and utility planning.

The City of Dublin has a strong history of incorporating fiscal analysis as part of citywide land use planning efforts, as well as for specific areas (e.g., Bridge Street Corridor). As a result of these analyses, Dublin has long understood the need to plan for the appropriate mix of land uses and understand the City's competitive position in the local and regional market for targeted industries. The *Envision Dublin Community Plan* continues this tradition.

FACTORS INFLUENCING THE FISCAL SUSTAINABILITY OF LAND USES

Numerous factors influence the fiscal results for different land uses. These factors include, but are not limited to:

- Local revenue structure,
- Services provided,
- Local levels of service,
- Capacity of existing infrastructure, and
- Demographic and market characteristics of new growth.

It is important to understand that every community will have contributors and recipients from a fiscal perspective, and which land uses contribute more in revenue than expenditures will vary from state to state based largely on local revenue structure and the other factors presented in this section. Does this mean that a community should only encourage land uses that provide fiscal benefits? Of course not. There is a symbiotic relationship between land uses that needs to be understood. Each land use type provides different types of benefits (e.g., fiscal, economic, environmental, etc.). For example, retail space needs customers, office and industrial uses need a supply of workers living nearby, and residential uses need employment opportunities and the ability to obtain goods and services. The key to achieving fiscal sustainability is understanding which land uses provide fiscal benefits, providing an adequate supply of appropriately zoned land, and making sure the adopted land use plan has the appropriate balance of land uses.
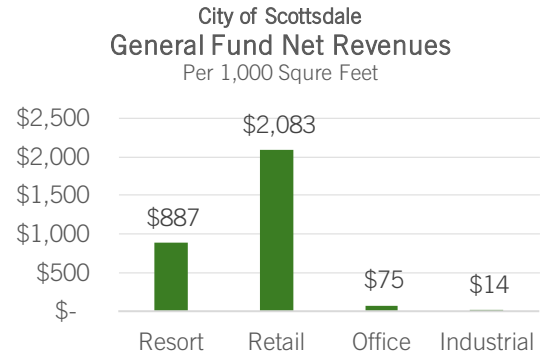
Local Revenue Structure

The local revenue structure, a key factor in calculating net fiscal results from new development, significantly impacts fiscal findings through its composition and revenue distribution/collection formulas. Each community relies on at least one revenue source and, in some cases, multiple. These sources, such as property tax, local sales tax, and state-shared revenues, form the backbone of the local revenue structure. A key aspect of this structure is the distribution and collection methods for these sources, which can vary significantly from state to state, except for property tax.

For example, in states where sales tax is collected, some allow communities to impose a local option sales tax, typically collected at the point of sale. Others collect sales tax at the state level and distribute the revenue to communities using a formula based on population. A similar situation arises with income tax, where some states permit a local income, or "piggyback" tax on top of the state income tax. In certain states, like Maryland, this tax is collected based on place of residence. In others, such as Ohio, it is collected based on place of employment.
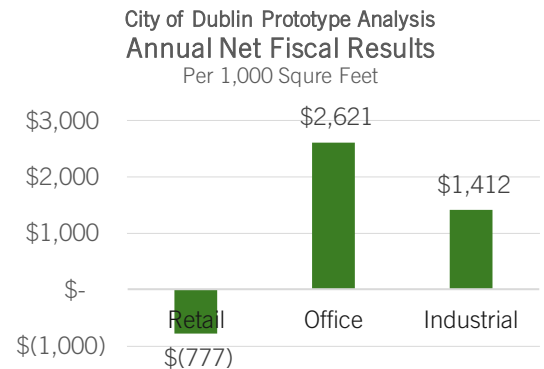
To illustrate the impact of how a jurisdiction's revenue structure influences the fiscal results, we compare examples from two cost-of-land-use studies for nonresidential land uses in Scottsdale, AZ, and Dublin, OH. The graphs below show net surpluses and deficits for nonresidential development per 1,000 square feet of floor area. Because the primary municipal revenue for Arizona municipalities is sales tax collected at point-of-sale, retail development performs the best from a fiscal perspective in the City of Scottsdale.

Example of Fiscal Impact Results: Locality with "Point of Sale" Sales Tax

City of Scottsdale
General Fund Net Revenues
Per 1,000 Squre Feet

Resort	$887
Retail	$2,083
Office	$75
Industrial	$14

Source: TischlerBise

Example of Fiscal Impact Results: Locality with Local Income Tax by Place of Employment

City of Dublin Prototype Analysis
Annual Net Fiscal Results
Per 1,000 Squre Feet

Retail	$(777)
Office	$2,621
Industrial	$1,412

Source: TischlerBise

Compare the results from the City of Scottsdale to a previous cost of land uses fiscal analysis prepared for the City of Dublin in the early 2000s. The primary revenue source for cities in Ohio is local income tax, which is based primarily on place of work rather than place of residence. Because of the differences between Arizona and Ohio municipal revenue structures, the fiscal hierarchy of nonresidential land uses are opposite of one another. In Ohio, office and industrial land uses perform much better fiscally than retail.

Services Provided

Another important factor in the fiscal equation is the services provided by a jurisdiction. Jurisdictions offer different services, and this is taken into account when performing a fiscal impact analysis. For example, school districts are separate entities with their tax rates in many states, including Ohio. In other states, schools get their local funds from County General Fund taxes (e.g., Virginia). The City's fiscal performance depends on such services and existing funding mechanisms.

Levels of Service

Another factor in fiscal impact analysis is understanding the levels of service currently being provided in a community. Existing service levels are defined as the facility or service standard presently being funded through the budget. Example service standards include pupil-teacher ratios (i.e., one teacher per 24 students), and parkland per capita. This is an essential factor since level of service generally varies from community to community.

Capacity of Existing Infrastructure

The capacity of existing infrastructure in a community also has a bearing on the fiscal sustainability of new development. For example, a community may be able to absorb many additional vehicle trips on its existing road network or may be significantly under capacity regarding high school enrollment. In either of these situations, using a case study-marginal cost approach that accounts for existing facilities and levels of usage to assess fiscal impacts, a community with excess capacity could absorb substantially higher growth over time without making additional infrastructure investments than a community without these capacities. This excess capacity results in lower capital costs over time. This is an important factor in the fiscal equation since the largest cost associated with capital facilities are the ongoing annual operating costs, which typically account for approximately 80 percent of a community's budget.

Demographic and Market Characteristics of New Growth

Next to a community's revenue structure, no other factor has as great an impact on the net fiscal results as the demographic and market characteristics of different land uses. Demographic and market variables for residential development include average household sizes, pupil generation rates, market value of housing units, trip generation rates, density per acre, and average household income. Important demographic and market characteristics for nonresidential development include square feet per employee, trip generation rates, market values per square foot, sales per square foot (retail), and floor area ratio.

EXISTING FINANCIAL CONDITION

The balance of revenue to expenditures is a complex process, the details of which are best reviewed in the City's annual budget or Comprehensive Annual Financial Report (CAFR). The budget process for the City is generally balanced from year to year; however, some expenditures and investments in infrastructure can occur over several years. The framework established to distribute these revenues towards the various costs to serve development consists of several Funds. These Funds include: the General Fund; Special Revenue Funds; Capital Projects Funds; Debt Service Funds; and Enterprise Funds.

The City has several funds/revenue sources in place to contribute to and address the cost of development. Below is a description of some of the revenue sources the City has established to fund infrastructure.

Enterprise Funds: These are funds where user fees are set to recover the cost of providing services and facilities such as water distribution and wastewater collection to the City's utility customer base. These revenues cover operating costs and capital items such as debt service. The City augments these revenues with capacity fees designed to recoup new growth's share of needed infrastructure.

Capital Improvement Funds: Other funding for improvements includes pay-as-you-go funding out of current revenues for lower-cost improvements. Grants are used to bridge funding gaps and leverage additional funds. Bonds also provide a relatively inexpensive way to finance large-scale projects. The City transfers bond sale proceeds to Debt Service Funds, which account for principal and interest payments on major, debt-financed infrastructure projects such as roadway construction.

Tax Increment Financing Funds: TIF funds account for the tax increment financing real estate tax payments received related to some or specific new development. The TIF funds are used to construct the infrastructure required to serve the latest development and sometimes to reimburse the developer for onsite improvements. TIF proceeds are remitted to the developer as received.

New Community Authority Funds: NCA funds are financed by additional real estate tax millage on new development within the City. The revenues from such millage are similar to tax increment financing to pay for infrastructure improvements attributed to new development.

WORKING DRAFT
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Revenues

Like all Ohio cities, the City of Dublin's primary source of discretionary funding is its local income tax. Income tax represents almost 90% ($70.5 million) of total General Fund revenue ($78.2 million) in FY2023 (shown in City of Dublin FY2023 General Fund Revenue Table). The discretionary portion of the income tax is accounted for in the General Fund.

The City's current income tax rate is 2%, lower than that of many surrounding communities. As shown in City of Dublin Income Tax Collections Table, the City has seen steady and significant growth in income tax collections since 2014 and projects this growth to continue. A majority of income tax revenue is made up of withholding taxes.

Dublin also assesses a property tax. However, the vast majority of property taxes paid by City residents is to the School District, Children's Services, MRDD, Senior Options, and other entities. The City of Dublin only receives about 2% of property tax. The City's property tax is allocated to the Safety Fund, in order to fund the City's police department, and towards parkland acquisition and capital improvements.

The City also receives revenue from engineering fees, building permits, and other fines, licenses, and permits. While these fees keep the City budget balanced, they must be continually assessed as expenses change over time due to growth and other factors.

Expenditures

The City provides a range of services to residents and workers, including police services, public works facilities development and maintenance, solid waste collection, parks and recreation maintenance, and community development services. However, the City is not responsible for funding school costs or fire protection.

General Fund expenditures by department are presented in the figure below.

An additional $25,700,000 is budgeted for capital investments necessary to accommodate growth and to provide a consistent level of service to residential and nonresidential development. 25% of the City's income tax revenue is dedicated to the capital improvement fund. Of this amount, 60% is allocated to fund long-term debt, while the remaining 40% funds short-term capital projects. These expenditures include investments in general government, public safety, water and sewer, streets, and parks and recreation.

City of Dublin Income Tax Collections
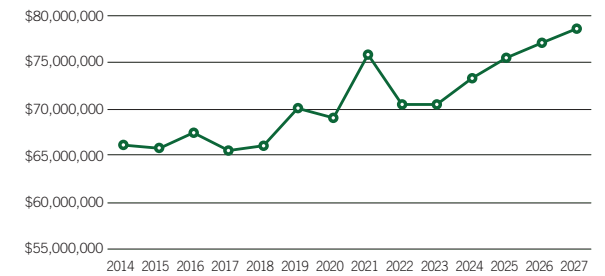
Source: City of Dublin FY2023 Budget

City of Dublin FY2023 General Fund Revenue

Revenue Type	FY 2023 Amount	Percent
Income Taxes	$70,500,000	90%
Intergovernmental Revenue	$625,760	1%
Charges for Services	$1,008,500	1%
Fines, Licenses, and Permits	$3,035,500	4%
Interest Income	$1,000,000	1%
Miscellaneious	$590,350	1%
Other Financing Sources	$1,448,800	2%
Total	**$78,208,910**	**100%**

Source: City of Dublin FY2023 Budget

City of Dublin FY2023 General Fund Expenditures

Expenditure Type	FY 2023 Amount	Percent
City Manager	$10,669,845	12%
City Council	$860,090	1%
Admin. Services	$15,564,705	17%
Deputy City Manager	$21,948,320	24%
Commercial Development	$7,626,175	8%
Finance	$35,276,740	38%
Total	**$92,022,875**	**100%**

Source: City of Dublin FY2023 Budget