

Housing Study & Strategy City of Dublin, OH

Final Report

Submitted to:
City of Dublin, OH

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1. Study Background

The City of Dublin is known as a high-quality, single-family residential suburb in the Columbus Region with primarily large lots and an abundance of parks and open space that includes 1,136 acres of undeveloped parkland, 60 developed parks, and 100 miles of bike paths. Dublin is also known for corporate headquarters, research, and technology companies. More recently, Dublin has integrated a more urban mix of residential development, retail, restaurant, office, and services uses creating a unique “urban core” for the City within the Bridge Street District. With 80 percent of future housing needs projected to be one and two person households with no children, the Bridge Street District is targeted to help fulfill this future need. The Bridge Street District provides one- to three-bedroom homes, including condominium units that focus on empty nesters and young professionals.

Figure 1: Bridge Park District



Photo Credit: MKSK

Other areas of the City that provide varied housing options include the Historic District that provides two-dwelling housing and live work units that typically appeal to young professionals. Housing more suited for aging residents includes residential developments with housing dedicated to dense patio homes that contain less square footage than a typical suburban house and have less maintenance needs for outdoor space. Dublin also has unique residential care communities that provide a range of housing types and associated care options that allow older adults to transition from independent living units to a full care housing facility all within the same community. These housing projects have assisted the City in providing additional housing options for the residents, and the City strives to continue this objective through this Housing Study.

Figure 2: Dublin’s Historic District



Photo Credit: City of Dublin

The primary goal of this study is to further the objectives of several regional housing analyses including Insight 2050 and the Regional Housing Strategy completed by the Mid-Ohio Regional Planning Commission (MORPC). Housing has also been discussed in more localized studies including the Historic District Task Force recommendations and the Dublin 2035 Framework Plan. Following the completion of the MORPC Regional Housing Strategy, Dublin’s City Council directed staff to conduct their own assessment of housing variety and attainability within the City, as well as define strategies for implementation and metrics to measure success. To guide the City in this effort, the City of Dublin retained Urban Partners as a consultant to complete the study.

Glossary of Housing Terms

The following are housing terms used throughout this document.

- **Affordable:** housing is generally considered affordable if the occupant is paying no more than 30 percent of gross income for housing costs, including utilities.
- **American Community Survey (ACS):** a national survey by the U.S. Census Bureau that collects information such as age, race, income, commute time to work, home value, veteran status and other important household data. It is collected more regularly than the Decennial Census but has a larger margin of error because it's derived from a smaller sample.
- **Cost burden:** policymakers and advocates consider a household “cost burdened” if more than 30% of their income goes towards housing costs. Being housing cost burdened is an indicator that a household may be unable to afford other critical and nondiscretionary costs such as health and childcare, education, food, and transportation.
- **Decennial Census:** undertaken by the U.S. Census Bureau every ten years ending in zero. It provides a count of the population and housing units for the entire United States. Its primary purpose is to provide the population counts that determine how seats in the U.S. House of Representatives are apportioned between the states.
- **Group Quarters:** places where people live or stay in a group living arrangement. Examples include group homes, nursing homes, university student housing (e.g., residence halls, fraternity/sorority houses), and correctional facilities.
- **Household:** all the people who occupy a housing unit. A household includes the related family members and all the unrelated people. A person living alone in a housing unit, or a group of unrelated people sharing a housing unit such as partners or roomers, is also counted as a household.
- **HUD:** the [Department of Housing and Urban Development](#) (HUD) is a cabinet department in the executive branch of the U.S. federal government that supports community development and homeownership. HUD enforces the Fair Housing Act and offers housing assistance through the Community Development Block Grant, Housing Choice Voucher program, and other programs.
- **Housing Subsidy:** policy tool designed to make the cost of housing affordable to low-income households. The most common housing subsidies include the [Low-Income Housing Tax Credit](#), [Housing Choice Vouchers](#) (also known as Section 8 Vouchers), and [HUD Section 202 Supportive Housing for the Elderly](#). Developments that utilize these subsidies are required to rent to low-income households (usually below 50% or 60% of the AMI).
- **Ohio Housing Finance Agency:** [OHFA](#) is the state housing agency that administers and allocates various state and federal housing assistance programs, such as the Low Income Housing Tax Credits.
- **Market-Rate Housing:** homes offered at the prevailing cost (rent or sale price) for the local market. It is set by the landlord/seller without restrictions.

- Workforce Housing:** the Urban Land Institute defines it as housing affordable to households earning between 60 and 120 percent of area median income (AMI). Workforce housing targets middle-income workers which include professions such as police officers, firefighters, teachers, health care workers, retail clerks, and the like (Matthew J. Parlow, 2015).
- Zoning:** a planning control tool for regulating the built environment and creating functional real estate markets. It does so by dividing land that comprises the statutory area of a local authority into sections, permitting particular land uses on specific sites to shape the layout of towns and cities and enable various types of development. The purpose of zoning is to allow local and national authorities to regulate and control land and property markets to ensure complementary uses (The World Bank).

Area Median Income (AMI)

The AMI is the estimated median income, adjusted for family size, by metropolitan area (or county, in nonmetropolitan areas). AMI is updated annually by HUD and used as the basis of eligibility for most housing assistance programs. For income-restricted rental communities that are subsidized by Low Income Housing Tax Credits and other government subsidies, the income cut-off is generally 50% or 60% of the AMI. The following table shows the AMI for Dublin:

	1 person	2 person	3 person	4 person	5 person	6 person	7 person	8 person
Median Income 100% of AMI	\$65,600	\$75,000	\$84,400	\$93,700	\$101,200	\$108,700	\$116,200	\$123,700
Low Income 80% of AMI	\$52,500	\$60,000	\$67,500	\$74,950	\$80,950	\$86,950	\$92,950	\$98,950
60% of AMI	\$39,360	45,000	\$50,640	\$56,220	\$60,720	\$65,220	\$69,720	\$74,220
Very Low Income 50% of AMI	\$32,800	37,500	\$42,200	\$46,850	\$50,600	\$54,350	\$58,100	\$61,850
30% of AMI	\$19,700	\$22,500	\$25,300	\$28,100	\$30,350	\$32,600	\$34,850	\$37,100
Max Housing Costs for 80% AMI								
Maximum Annual Housing Cost	\$17,700	\$16,800	\$17,700	\$20,976	\$22,668	\$24,348	\$26,028	\$27,708
Maximum Monthly Rent/Mortgage	\$1,225	\$1,400	\$1,575	\$1,748	\$1,889	\$2,029	\$2,169	\$2,309
Maximum Mortgage Amount	\$230,816	\$263,789	\$296,763	\$329,517	\$355,896	\$382,275	\$408,654	\$435,032

*** at current 30-year mortgage interest rates (4.9%), \$4,700 in property tax annually and \$500 hazard insurance. Downpayment not factored.*

Residential Housing Types

The following residential housing types are discussed throughout the report. Each of the housing types can be offered to the public as for-sale and/or for-rent products.



Single Family Detached



Duplex



Triplex - Stacked



Patio Homes



Cottage Home



Townhouse



Live-Work



Mid-Rise



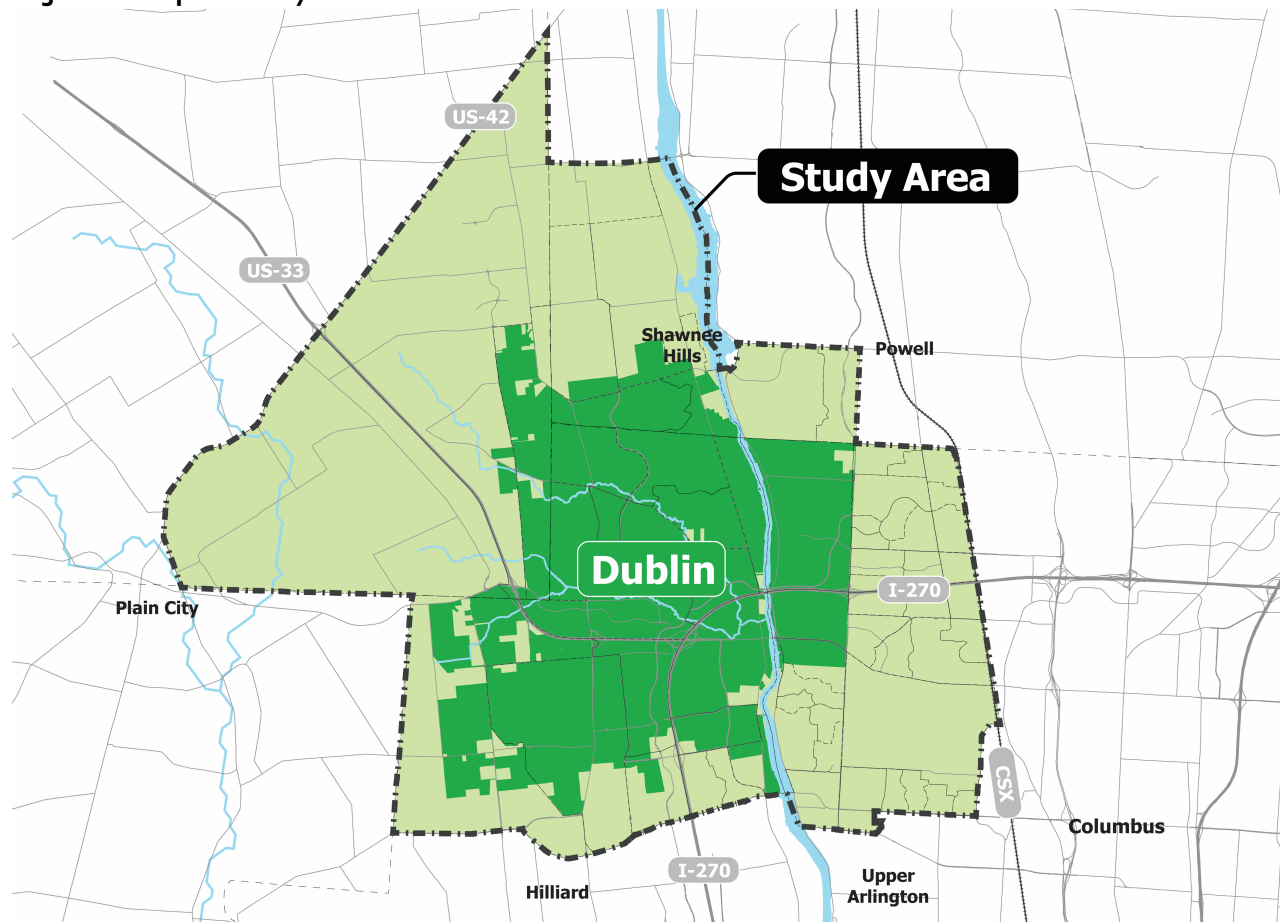
High-Rise

2. Demographic Trends

The starting point for a housing market analysis is an examination of key demographic trends to identify the composition of the market's residents as they relate to its housing stock. Specific elements of these trends include population and household characteristics, and income and poverty rates. Detailed analyses of the housing stock and housing market conditions will be discussed in subsequent sections of this study.

The primary data sources for this demographic analysis are the U.S. Census Bureau's Decennial Census, providing actual counts for the years 2010 and 2020 when available, and the American Community Survey, providing data based on calculated estimates for 2010 and 2019, the latest year for which detailed data is available for most demographic trends. The geographic study areas analyzed and compared for this analysis include the City of Dublin; surrounding Delaware, Franklin, and Union Counties; and a Study Area composed of multiple Census Tracts that fall within each of those jurisdictions (see Figure 3). While some of the actual tracts changed with the new 2020 Redistricting Dataset, the Study Area has remained the same for the Decennial Census and American Community Survey data.

Figure 3: Map of Study Area



Population and Household Characteristics

The 2020 Census reported a total of 136,345 residents for the Study Area, an increase of 27,766 residents, or 25.6%, from 2010 (see Table 1). This rapid growth resulted from robust productions of new residential communities in high growth areas within the Study Area. During the same period, the City of Dublin increased by 7,577 residents, or 18.1%. In comparison, Delaware County grew by 22.9%, adding 39,910 residents from 2010 to 2020, while Franklin County grew by 13.8% (160,393 residents), and Union County by 20.0% (10,484 residents).

Table 1: Population Trends, 2010-2020

	2010 Census	2020 Census	Change (2010-2020)	% Change (2010-2020)
Study Area	108,579	136,345	27,766	25.6%
City of Dublin	41,751	49,328	7,577	18.1%
Delaware County	174,214	214,124	39,910	22.9%
Franklin County	1,163,414	1,323,807	160,393	13.8%
Union County	52,300	62,784	10,484	20.0%

Source: U.S. Census Bureau, Urban Partners

As shown on Table 2 below, the area’s household growth trends were similar to the population growth from 2010 to 2020. The Study Area’s households increased by 25.4% from 2010 to 2020—again, likely the result of rapid housing production. The City of Dublin’s households grew by 16.4% during the same decade. The growth of households for the three counties also closely mirrored the rates of population growth for their respective geographies.

Table 2: Household Trends, 2010-2020

	2010 Census	2020 Census	Change (2010-2020)	% Change (2010-2020)
Study Area	43,889	55,027	11,138	25.4%
City of Dublin	14,984	17,435	2,451	16.4%
Delaware County	62,760	77,713	14,953	23.8%
Franklin County	477,235	540,369	63,134	13.2%
Union County	18,065	21,807	3,742	20.7%

Source: U.S. Census Bureau, Urban Partners

Contrary to national trends, the Study Area experienced a slight net increase in average household size from 2010 to 2019, according to the American Community Survey 5-Year Estimates (ACS), expanding from 2.51 to 2.52 (see Table 3 on the following page). This was the second lowest among the geographies examined. Renter-occupied household size also increased slightly while owner-occupied households declined slightly. In the City of Dublin, average household size decreased slightly overall, from 2.76 to 2.75, while it stayed the same for renters and grew rather significantly (6.7%) for renters. While average household size among renters also increased notably in the three counties, only Union County experienced a net overall decrease (-1.1%) due to its decrease in size of owner-occupied households.

Table 3: Average Household Size, 2010-2019

	2010 ACS			2019 ACS			% Change (2010-2019)		
	All	Owner	Renter	All	Owner	Renter	All	Owner	Renter
Study Area	2.51	2.65	2.24	2.52	2.64	2.26	0.5%	-0.4%	0.9%
Dublin City	2.76	2.92	2.09	2.75	2.92	2.23	-0.4%	0.0%	6.7%
Delaware County	2.67	2.77	2.16	2.84	2.97	2.27	6.4%	7.2%	5.1%
Franklin County	2.44	2.55	2.30	2.47	2.57	2.35	1.2%	0.8%	2.2%
Union County	2.68	2.81	2.22	2.65	2.71	2.41	-1.1%	-3.6%	8.6%

Source: U.S. Census Bureau, Urban Partners

The Study Area had only 0.4% of its residents living in non-household group quarters in 2019, just slightly above the City of Dublin at 0.3% and well below the Counties (see Table 4). The portion of the population living in family versus non-family households among the examined geographies was quite varied. In the Study Area, 82.6% of its households were family households—the second lowest. To the contrary, Dublin City had the highest proportion of family households at 91.1%.

Table 4: Population by Household Type, 2019

	Study Area	Dublin City	Delaware County	Franklin County	Union County
Total Population	121,435	45,559	197,008	1,275,333	55,654
In Households	120,926	45,408	194,387	1,247,164	52,455
In Households (% of Total Population)	99.6%	99.7%	98.7%	97.8%	94.3%
In Family Households (% of Households)	82.6%	91.1%	89.6%	77.5%	87.2%
In Non-Family Households (% of Households)	17.4%	8.9%	10.4%	22.5%	12.8%
In Group Quarters (% of Total Population) ¹	0.4%	0.3%	1.3%	2.2%	5.7%

Source: U.S. Census Bureau, Urban Partners

The ethnic/racial composition of the Study Area and region's population is predominantly White, though the region has grown more diverse since 2010 (see Table 5 shown on the following page). In the Study Area in 2020, the White population was just below 70%, down from 77.8% in 2010. The second highest percentage of the Study Area's 2020 population was Asian at 15.8%, followed by the Hispanic population at 5.6%. Dublin City had the highest 2020 Asian proportion of its population at 20.4% while Franklin County had the highest African American and Hispanic proportions among the geographies examined (22.4% and 6.9%, respectively). Almost no American Indian, Alaskan Native, or Hawaiian/Pacific Islanders live in the region.

¹ The Census Bureau classifies all people not living in housing units (house, apartment, mobile home, rented rooms) as living in Group Quarters, of which there are two types: 1) Institutional, such as correctional facilities, nursing homes, or mental hospitals; and 2) Non-Institutional, such as college dormitories, military barracks, group homes, missions, or shelters.

Table 5: Ethnic/Racial Composition, 2010-2020

	White Alone	Black or African American Alone	American Indian & Alaska Native Alone	Asian Alone	Native Hawaiian & Other Pac Islander Alone	Some other Race Alone	Two or More Races	Hispanic (All Races)
Study Area								
2010	77.8%	3.6%	0.1%	11.9%	0.0%	0.2%	2.1%	4.2%
2020	69.1%	4.5%	0.1%	15.8%	0.0%	0.5%	4.4%	5.6%
Dublin City								
2010	79.3%	1.7%	0.1%	15.3%	0.0%	0.1%	1.7%	1.8%
2020	70.6%	1.9%	0.1%	20.4%	0.0%	0.3%	3.8%	2.9%
Delaware County								
2010	88.4%	3.3%	0.1%	4.2%	0.0%	0.1%	1.7%	2.1%
2020	80.1%	3.6%	0.1%	8.5%	0.0%	0.4%	4.1%	3.3%
Franklin County								
2010	67.3%	21.0%	0.2%	3.8%	0.1%	0.2%	2.6%	4.8%
2020	59.5%	22.4%	0.2%	5.6%	0.0%	0.5%	4.9%	6.9%
Union County								
2010	92.1%	2.3%	0.2%	2.7%	0.0%	0.1%	1.3%	1.3%
2020	84.9%	2.0%	0.1%	6.4%	0.0%	0.3%	3.7%	2.4%

Source: U.S. Census Bureau, Urban Partners

Table 6 and Figure 4 compare the age distribution patterns between the Study Area, City of Dublin, and the surrounding counties. The largest age cohort in 2019 in the Study Area, according to the ACS, is school-aged children (5 to 17 years old) at 17.7%. However, this figure declined by two percentage points since 2010. This is followed closely by the population aged 25 to 34 at 17.5%, which experienced a slight increase in the Study Area since 2010.

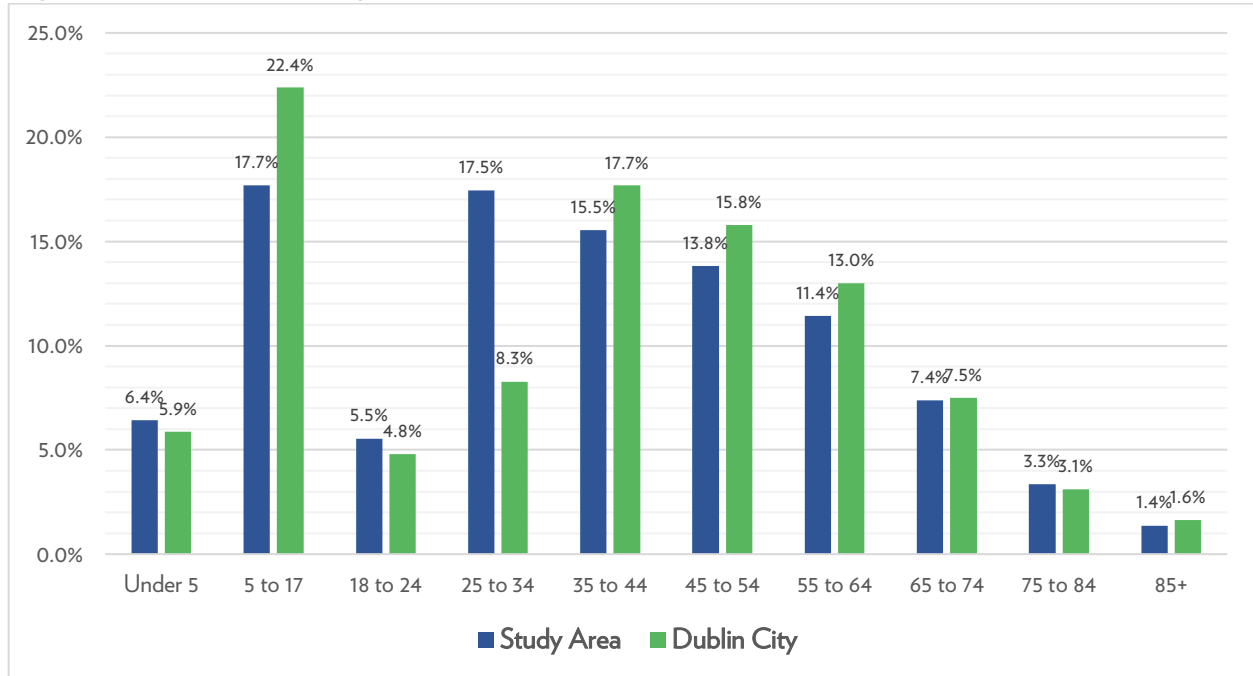
Table 6: Distribution of Age, 2010-2019

	Under 5	5 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 to 74	75 to 84	85 & Over
Study Area										
2010	6.1%	19.7%	7.8%	17.0%	15.0%	15.5%	10.6%	4.2%	2.5%	1.5%
2019	6.4%	17.7%	5.5%	17.5%	15.5%	13.8%	11.4%	7.4%	3.3%	1.4%
Dublin City										
2010	6.4%	23.7%	5.1%	10.3%	18.5%	17.0%	11.4%	4.2%	2.2%	1.1%
2019	5.9%	22.4%	4.8%	8.3%	17.7%	15.8%	13.0%	7.5%	3.1%	1.6%
Delaware County										
2010	7.8%	21.1%	6.4%	12.0%	17.6%	15.3%	10.7%	5.3%	2.8%	0.9%
2019	6.2%	20.5%	7.8%	9.8%	15.3%	15.2%	12.1%	8.2%	3.6%	1.3%
Franklin County										
2010	7.1%	17.0%	11.6%	16.6%	14.0%	13.8%	9.9%	5.3%	3.3%	1.3%
2019	7.1%	16.3%	9.8%	18.2%	13.4%	12.1%	11.4%	7.1%	3.2%	1.4%
Union County										
2010	6.9%	20.7%	7.1%	13.5%	17.1%	15.7%	9.8%	5.3%	3.0%	1.0%
2019	6.2%	18.5%	7.9%	12.8%	15.3%	15.1%	12.2%	7.4%	3.2%	1.4%

Source: U.S. Census Bureau, Urban Partners

As with the Study Area, the City of Dublin’s largest age cohort is also school-aged children—comprising 22.4% of the City’s population—but it also experienced a decrease in percentage. The same holds true for Delaware, Franklin, and Union Counties. At the same time, in each jurisdiction examined, the proportion of older residents has increased—with seniors 65 years-of-age and older growing from about 8% of the population in 2010 to more than 12% in 2019 in both the Study Area and Dublin City.

Figure 4: Comparison of Age Distribution - City of Dublin, Study Area, 2019



Source: U.S. Census Bureau, Urban Partners

The Study Area in 2019 had a significantly higher educational attainment level of residents over the age of 25 than the surrounding Counties, but lower than the City of Dublin (see Table 7 shown on the following page). Over 69% of the residents aged 25 and above in the Study Area had bachelor’s degrees or graduate/professional degrees as the highest educational attainment, up from 64.1% in 2010—compared to 78.1% and 75.8%, respectively, in Dublin City. In the Study Area, City, and Delaware County, residents with bachelor’s degrees made up the largest proportion of their respective populations in 2019. In Franklin and Union Counties, the highest proportion had high school diplomas as the highest attainment, though this figure decreased as more residents received higher degrees since 2010.

Table 7: Educational Attainment for Population 25 Years and Over, 2010-2019

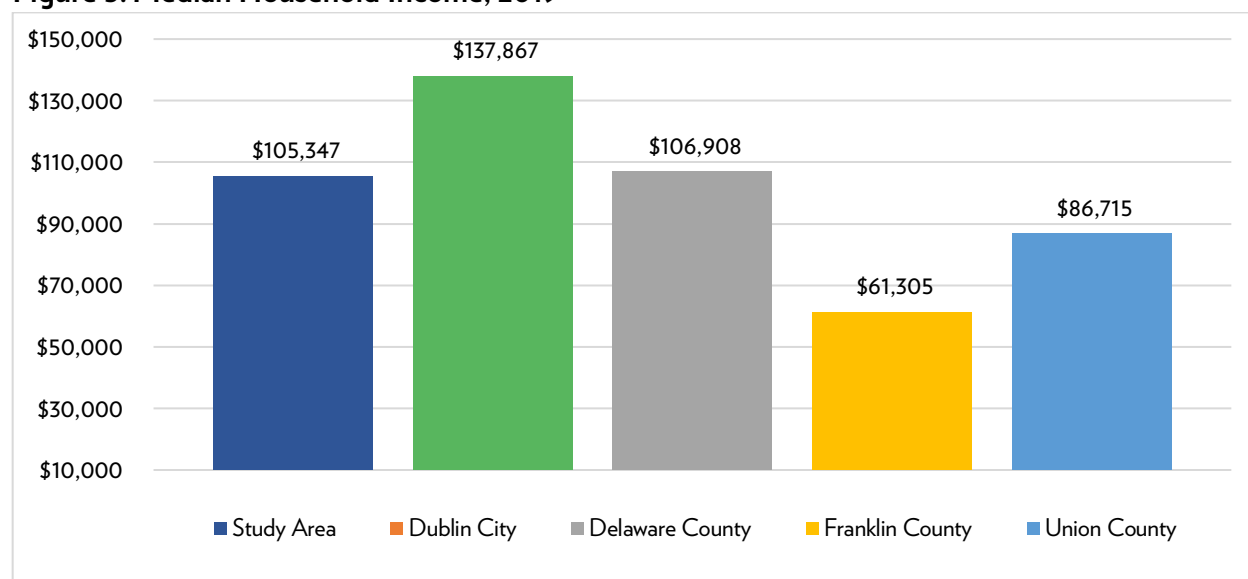
	Less Than 9th Grade	9th to 12th Grade, No Diploma	High School Graduate (Includes Equiv.)	Some College, No Degree	Associate's Degree	Bachelor's Degree	Graduate/ Professional Degree
Study Area							
2010	1.2%	2.4%	14.6%	17.7%	6.4%	36.9%	20.9%
2019	1.2%	2.3%	12.3%	15.0%	6.1%	38.2%	24.9%
Dublin City							
2010	1.0%	0.6%	8.4%	14.2%	4.9%	42.6%	28.2%
2019	0.7%	2.3%	7.5%	10.9%	4.1%	42.7%	31.9%
Delaware County							
2010	1.3%	3.2%	20.7%	18.0%	7.4%	32.5%	17.0%
2019	0.8%	2.8%	18.3%	17.2%	6.6%	34.4%	19.9%
Franklin County							
2010	3.2%	7.9%	27.0%	20.5%	6.3%	22.8%	12.2%
2019	2.9%	5.9%	24.6%	19.6%	6.9%	25.3%	14.8%
Union County							
2010	1.9%	7.8%	37.6%	18.7%	6.7%	19.7%	7.7%
2019	1.5%	5.1%	32.0%	19.1%	6.8%	23.0%	12.5%

Source: U.S. Census Bureau, Urban Partners

Household Income & Poverty Characteristics

As shown in Figure 5, Study Area households—with a median household income of \$105,347—were wealthier than households in Franklin and Union Counties, according to the 2019 ACS. However, median household income in Dublin City (with the highest among the examined jurisdictions at \$137,867) and Delaware County exceeded that of the Study Area.

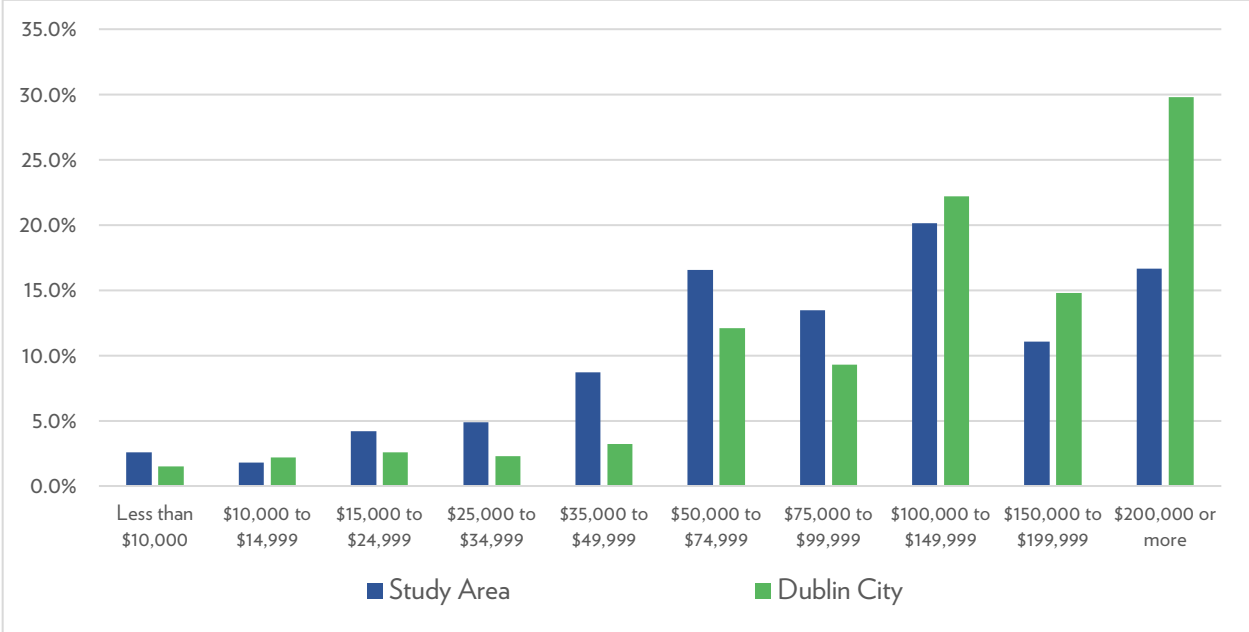
Figure 5: Median Household Income, 2019



Source: U.S. Census Bureau, Urban Partners

In the Study Area in 2019, almost 48% of the households earned more than \$100,000 annually, compared to 66.8% in Dublin City (see Figure 6). The largest income category in the Study Area was \$100,000 to \$149,000 (20.1%), compared to \$200,000 or more in Dublin City (29.8%).

Figure 6: Distribution of Median Household Income - City of Dublin, Study Area, 2019



Source: U.S. Census Bureau, Urban Partners

According to the 2019 ACS, 6,858 Study Area residents (or 5.5%) were living below the poverty level, compared to just 2.5% in the City of Dublin (see Table 8). As a comparison, the poverty rate for Delaware County was slightly lower than the Study Area at 4.8%, Union County slightly higher at 5.9%, and Franklin County significantly higher at 15.7%.

Table 8: Population Living Below Poverty Level, 2019

	Study Area	Dublin City	Delaware County	Franklin County	Union County
Population Living Below Poverty Level	6,858	1,162	9,530	197,950	3,143
Population Living Below Poverty Level (%)	5.5%	2.5%	4.8%	15.7%	5.9%

Source: U.S. Census Bureau, Urban Partners

At the same time, 17.7% of owner-occupant households in the Study Area pay more than 30% of their income toward housing costs (and thus are “cost-burdened”), and 32.0% of renter households are cost burdened (see Table 9 shown on the following page).

Table 9: Tenure by Housing Costs - Study Area, 2019

	Owner Occupants	%	Renter Occupants	%
All Household Income Levels	30,947	-	19,692	-
Less than 20%	17,850	57.7%	7,825	39.7%
20 to 29%	7,579	24.5%	4,839	24.6%
30% or more	5,480	17.7%	6,306	32.0%
Zero or negative income/no cash rent	38	0.1%	722	3.7%

Source: U.S. Census Bureau, Urban Partners

The most cost burdened households in 2019 in the Study Area are renters with annual household incomes under \$35,000 (see Table 10). A total of 4,242 such renter households resided in the Study Area and 4,055 (or 95.6%) were cost burdened.² At earnings greater than \$35,000 annually, owner-and renter-occupied households have a much more even burden of housing costs as a percentage. Households with annual earnings greater than \$75,000 are effectively free of housing cost burdens, particularly among renter-occupants.

Table 10: Tenure by Housing Costs as a Percentage of Household Income - Study Area, 2019

	Owner Occupants	%	Renter Occupants	%
Households earning less than \$20,000	1,089		1,810	
Less than 30% (not cost burdened)	34	3.1%	38	2.1%
30% or more (cost burdened)	1,055	96.9%	1,772	97.9%
Households earning \$20,000 to \$34,999	1,210		2,432	
Less than 30% (not cost burdened)	212	17.5%	149	6.1%
30% or more (cost burdened)	998	82.5%	2,283	93.9%
Households earning \$35,000 to \$49,999	1,859		2,717	
Less than 30% (not cost burdened)	946	50.9%	1,295	47.7%
30% or more (cost burdened)	913	49.1%	1,422	52.3%
Households earning \$50,000 to \$74,999	4,633		4,352	
Less than 30% (not cost burdened)	3,329	71.9%	3,744	86.0%
30% or more (cost burdened)	1,304	28.1%	608	14.0%
Households earning \$75,000 or more	22,118		7,659	
Less than 30% (not cost burdened)	20,908	94.5%	438	97.1%
30% or more (cost burdened)	1,210	5.5%	221	2.9%

Source: U.S. Census Bureau, Urban Partners

² This figure includes 1,772 renter households earning less than \$20,000 and 2,283 renter households earning between \$20,000 and \$34,999.

3. Employment Trends

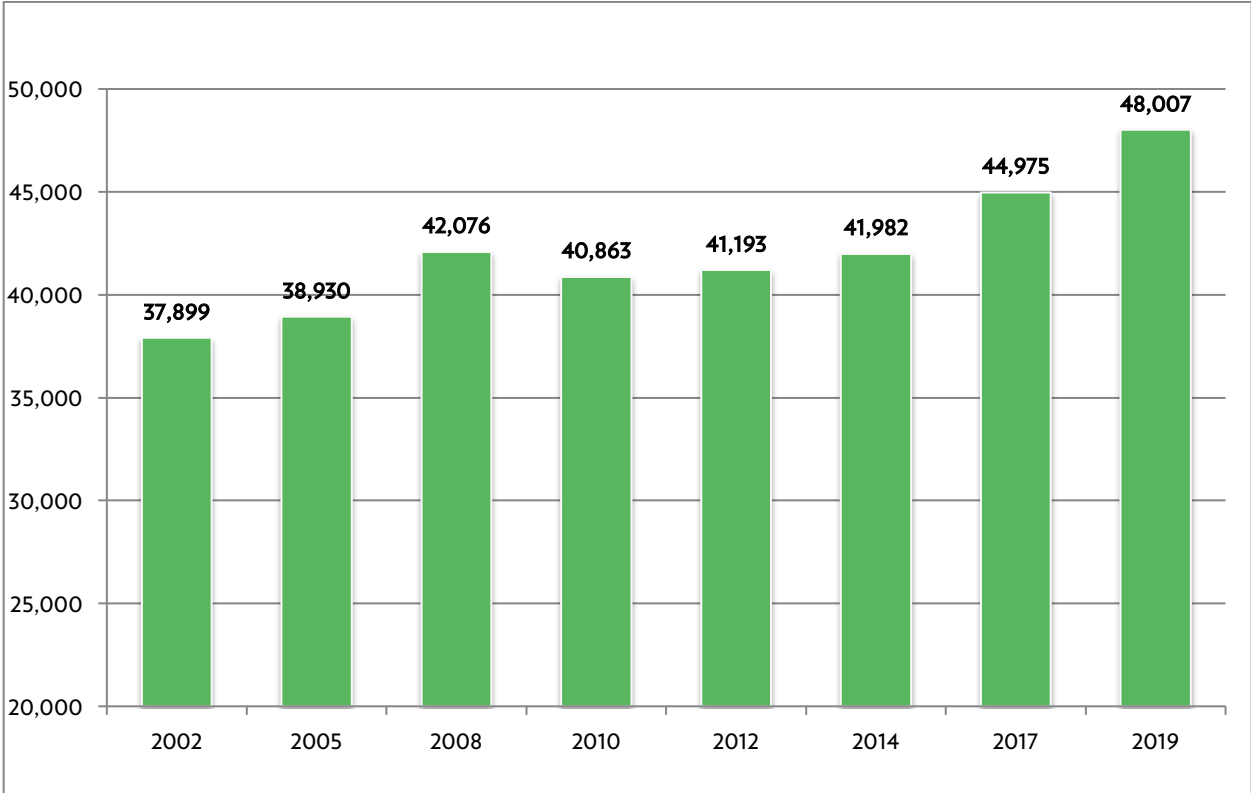
The correlation between job growth (or decline) and the local housing market is complex and beyond the scope of this housing study, but simply stated—as a region or municipality adds new jobs, it attracts new workers and their households that will need housing. The increase in new workers will increase demand for homes and will result in a more competitive marketplace for housing. Conversely, the opposite will occur when a region or municipality loses jobs.

The following is an examination of employment patterns for the City of Dublin and its residents from 2002 to 2019. The data source for this analysis is the *OnTheMap* application from the U.S. Census Bureau’s Longitudinal Employer-Household Dynamics Program, which uses employer payroll tax information to geo-locate jobs within a defined area.

Jobs Located in Dublin

According to the *OnTheMap* application, the City of Dublin reported a total of 48,007 jobs, adding 10,108 jobs from 2002 to 2019, a growth of 26.7% (see Figure 7). Apart from 2008 to 2010 when the number of jobs dipped during the Great Recession, Dublin consistently added new workers during the examination period.

Figure 7: Jobs Located in the City of Dublin (2002-2019)



Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

Detailed in Table 11 below, three industrial sectors experienced robust job growth in Dublin from 2002 to 2019: *Health Care & Social Assistance* sector added 4,878 net new jobs (growth rate of 156.7%); *Professional, Scientific, and Technical Services* sector added 3,593 net new jobs (growth rate of 84.9%); and *Management of Companies and Enterprises* sector added 2,043 net new jobs (growth rate of 85.0%).

Of the sectors that experienced job losses, the contraction of the *Retail Trade* sector was the most significant. In 2002, there were 4,924 jobs in the *Retail Trade* sector, more than any other sector in Dublin. Between 2002 and 2019, Dublin shed 1,777 *Retail Trade* jobs, which represents a decline of 36.1%. Other sectors reporting job losses in this period include *Administrative & Support, Waste Management/Remediation*³ (loss of 564 jobs, or 12.3% decline); *Manufacturing* (loss of 535 jobs, or 32.5% decline); and *Real Estate and Rental & Leasing* (loss of 490 jobs, or 40.7% decline).

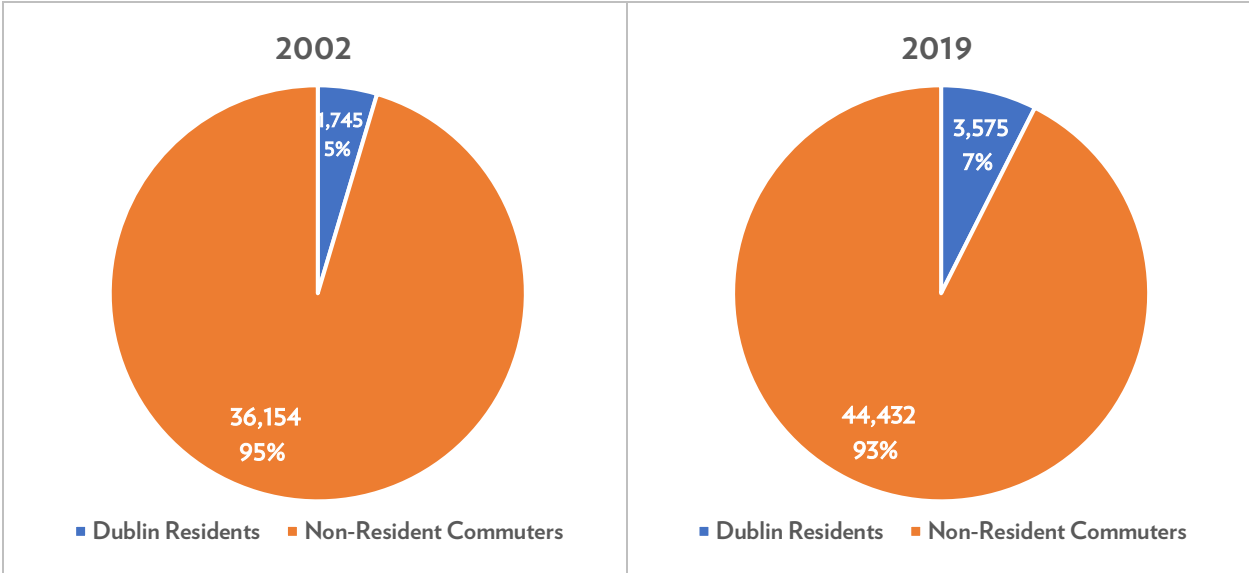
Table 11: Jobs Located in the City of Dublin by Industry Sectors, 2002-2019

	Jobs in 2002	%	Jobs in 2019	%	Change 2002-2019
All Sectors	37,899	100.0%	48,007	100.0%	10,108
Health Care and Social Assistance	3,112	8.2%	7,990	16.6%	4,878
Professional, Scientific, and Technical Services	4,233	11.2%	7,826	16.3%	3,593
Management of Companies and Enterprises	2,404	6.3%	4,447	9.3%	2,043
Admin & Support, Waste Mgmt/Remed.	4,594	12.1%	4,030	8.4%	-564
Finance and Insurance	3,390	8.9%	3,467	7.2%	77
Accommodation and Food Services	2,696	7.1%	3,257	6.8%	561
Retail Trade	4,924	13.0%	3,147	6.6%	-1,777
Wholesale Trade	2,052	5.4%	3,032	6.3%	980
Information	2,234	5.9%	2,779	5.8%	545
Educational Services	1,636	4.3%	1,828	3.8%	192
Arts, Entertainment, and Recreation	444	1.2%	1,137	2.4%	693
Manufacturing	1,648	4.3%	1,113	2.3%	-535
Other Services (excluding Public Administration)	928	2.4%	1,089	2.3%	161
Construction	1,118	2.9%	1,008	2.1%	-110
Transportation and Warehousing	830	2.2%	728	1.5%	-102
Real Estate and Rental and Leasing	1,204	3.2%	714	1.5%	-490
Public Administration	327	0.9%	371	0.8%	44
Utilities	96	0.3%	44	0.1%	-52
Agriculture, Forestry, Fishing and Hunting	9	0.0%	0	0.0%	-9
Mining, Quarrying, and Oil and Gas Extraction	20	0.1%	0	0.0%	-20

Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

In terms of commuting, the *OnTheMap* application reports that the number and the percentage of workers living and working in Dublin have increased from 1,745 (4.6%) in 2002 to 3,575 (7.4%) in 2019 (see Figure 8). Though making up a slightly smaller percentage of the employment base, the number of individuals commuting from outside of Dublin has increased from 36,154 workers in 2002 to 44,432 workers in 2019.

Figure 8: Percentage of Dublin Residents Working in the City, 2002-2019



Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

Workers “reverse-commuting” from Columbus make up the largest block of the labor force in Dublin (16,434 workers, or 34.2% of the total), followed by residents of Dublin (3,575 workers, 7.4% of all workers in Dublin). Workers commuting from Hilliard have increased significantly, comprising 3.0% of Dublin’s workforce in 2019 (a total of 1,460 workers. See Table 12).

Table 12: Top 10 Commuting Origins for Dublin Workers, 2002-2019

	Jobs in 2002	%	Jobs in 2019	%	% Change 2002-2019
Columbus	10,083	26.6%	16,434	34.2%	63.0%
Dublin	1,745	4.6%	3,575	7.4%	104.9%
Hilliard	641	1.7%	1,460	3.0%	127.8%
Delaware	800	2.1%	855	1.8%	6.9%
Marysville	703	1.9%	810	1.7%	15.2%
Westerville	551	1.5%	784	1.6%	42.3%
Powell	483	1.3%	578	1.2%	19.7%
Gahanna	315	0.8%	476	1.0%	51.1%
Reynoldsburg	368	1.0%	373	0.8%	1.4%
Cincinnati	448	1.2%	321	0.7%	-28.3%
Toledo	404	1.1%	230	0.5%	-43.1%
All Other Locations	21,358	56.4%	22,111	46.1%	3.5%

Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

Employed Dublin Residents

According to the *OnTheMap* application, there were a total of 24,592 employed residents of Dublin in 2019, an increase of 13,185 persons (115.6%) from 2002 (see Table 13). Employment in all 20 sectors grew, with the following five sectors representing the top sectors in which Dublin residents were employed in 2019: *Health Care & Social Assistance; Educational Services; Professional, Scientific, and Technical Services; Retail Trade; and Finance & Insurance.*

Table 13: Jobs of Dublin Residents by Industry Sectors, 2002-2019

	Jobs in 2002	%	Jobs in 2019	%	Change 2002-2019
All Sectors	11,407	100.0%	24,592	100.0%	13,185
Health Care and Social Assistance	1,079	9.5%	3,158	12.8%	2,079
Educational Services	1,156	10.1%	3,073	12.5%	1,917
Professional, Scientific, and Technical Services	1,137	10.0%	3,051	12.4%	1,914
Retail Trade	1,251	11.0%	1,923	7.8%	672
Finance and Insurance	979	8.6%	1,875	7.6%	896
Accommodation and Food Services	738	6.5%	1,710	7.0%	972
Admin & Support, Waste Mgmt/Remed.	690	6.0%	1,446	5.9%	756
Manufacturing	944	8.3%	1,388	5.6%	444
Management of Companies and Enterprises	342	3.0%	1,283	5.2%	941
Wholesale Trade	520	4.6%	1,122	4.6%	602
Transportation and Warehousing	341	3.0%	796	3.2%	455
Information	424	3.7%	792	3.2%	368
Public Administration	605	5.3%	731	3.0%	126
Other Services (excluding Public Administration)	362	3.2%	668	2.7%	306
Construction	346	3.0%	559	2.3%	213
Arts, Entertainment, and Recreation	182	1.6%	467	1.9%	285
Real Estate and Rental and Leasing	217	1.9%	342	1.4%	125
Utilities	81	0.7%	151	0.6%	70
Agriculture, Forestry, Fishing and Hunting	9	0.1%	43	0.2%	34
Mining, Quarrying, and Oil and Gas Extraction	4	0.0%	14	0.1%	10

Source: U.S. Census Bureau Center for Economic Studies, *Urban Partners*

The *OnTheMap* application reports that 3,575 out of the 24,592 employed Dublin residents (14.5%) work inside the City, meaning that 85.5% of employed City residents commute elsewhere for work. In 2002, 84.7% of employed City residents commuted to locations outside of Dublin for work. In 2019, 43.6% of all employed Dublin residents commuted to Columbus for work, followed by those staying in Dublin (14.5%), and those commuting to Westerville (2.7%) and Hilliard (2.5%. See Table 14 on the following page).

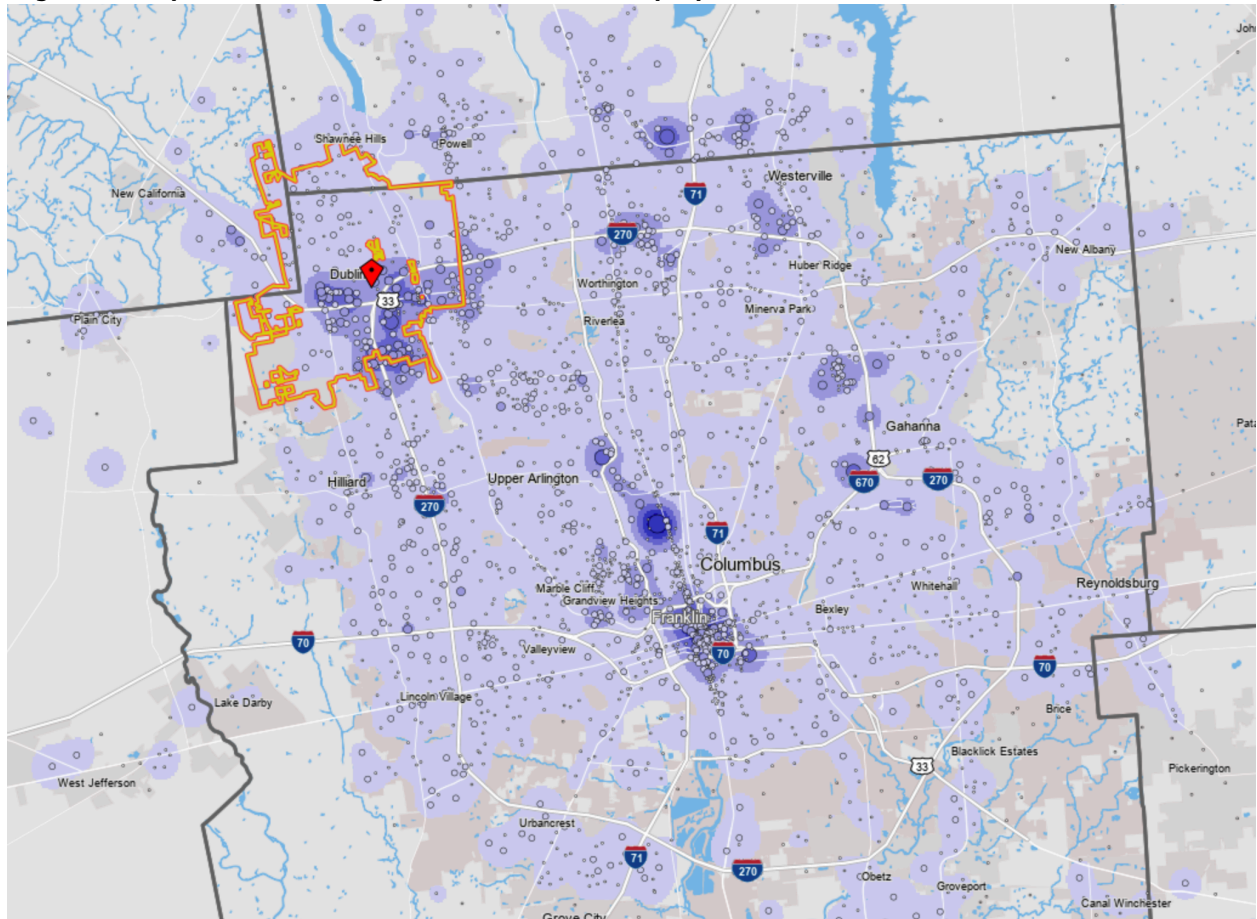
Table 14: Top Commuting Destinations for Employed Dublin Residents, 2002-2019

	Jobs in 2002	%	Jobs in 2019	%	% Change 2002-2019
Columbus	5,311	46.6%	10,732	43.6%	-6.3%
Dublin	1,745	15.3%	3,575	14.5%	-5.0%
Westerville	250	2.2%	674	2.7%	25.1%
Hilliard	301	2.6%	608	2.5%	-6.3%
Gahanna	178	1.6%	432	1.8%	12.6%
Worthington	358	3.1%	396	1.6%	-48.7%
Marysville	278	2.4%	381	1.5%	-36.4%
Upper Arlington	196	1.7%	338	1.4%	-20.0%
All Other Locations	2,790	24.5%	7,456	30.3%	24.0%

Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

Figure 9 is a graphic illustration of commuting patterns for employed Dublin residents. There are two significant employment nodes for out-commuters from Dublin: 1) Downtown Columbus; and 2) the Ohio State University campus.

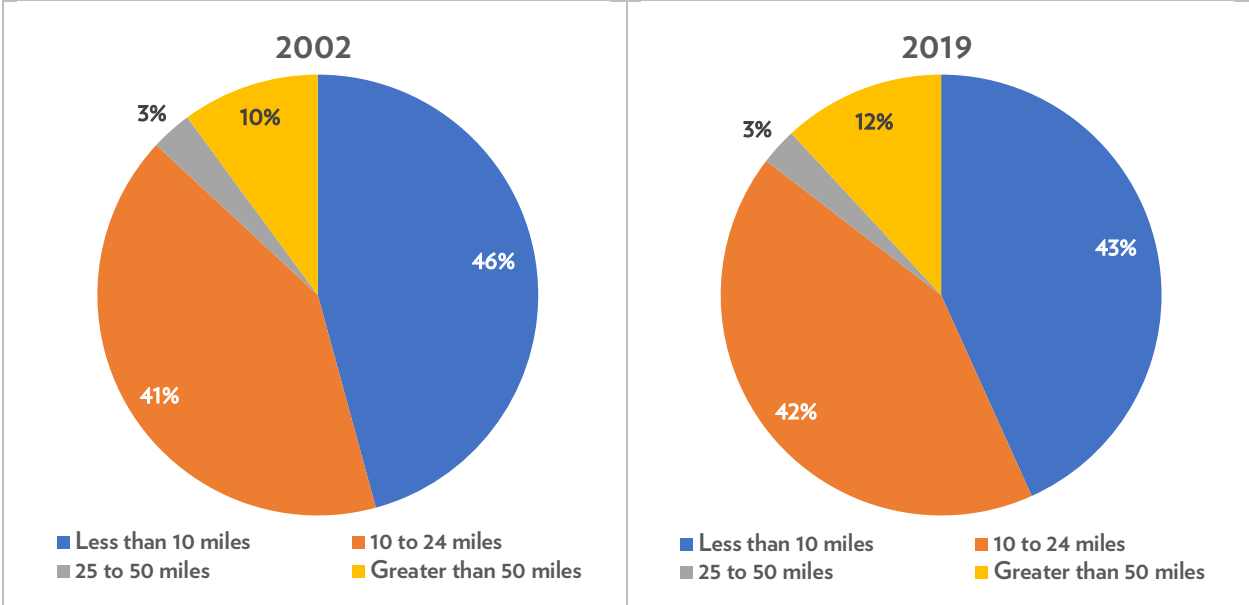
Figure 9: Map of Commuting Destinations for Employed Dublin Residents



Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

Commuting distances have increased slightly among employed Dublin residents. In 2002, 45.8% of employed Dublin residents traveled less than 10 miles for work and 10.1% lived more than 50 miles from their work locations. In 2019, 43.3% of employed Dublin residents reported commutes of less than 10 miles, while the percentage of Dublin residents commuting more than 50 miles increased to 11.9% (see Figure 10).

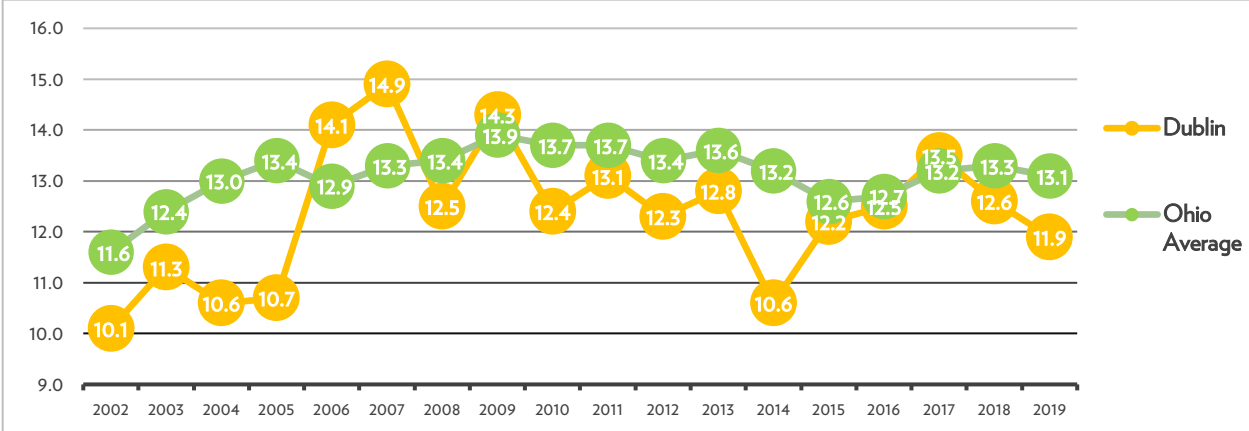
Figure 10: Percentage of Employed Dublin Residents by Commuting Distances, 2002-2019



Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

Figure 11 shows the percentage of employed residents who live more than 50 miles from their place of employment from 2002 to 2019. Compared to the state average, a slightly smaller percentage of employed Dublin residents commute more than 50 miles (11.9% compared to 13.1%)—though from 2006 to 2007 the rates exceeded the state average before falling again starting in 2008.

Figure 11: Percentage of Workers that Live More than 50 Miles from Work, 2002-2019



Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

4. Housing Supply Analysis

From 2010 to 2019, the total number of housing units in the City of Dublin grew by 16.0%, which was a slightly higher growth rate than the Study Area’s increase of 14.9%. Even as the overall supply of housing has been increasing, the vacancy rates have been falling. In 2010, the U.S. Census Bureau reported 914 vacant homes in Dublin, which represented a vacancy rate of 6.1%. In 2019, there were 642 vacant homes reported for a 3.7% vacancy rate. The Study Area’s vacancy rate also dropped from 7.8% in 2010 to 5.0% in 2019 (see Table 15).

Table 15: Total Housing Units and Occupancy Status, 2010-2019

	2010 ACS	%	2019 ACS	%	% Change 2010-2019
City of Dublin	15,057	-	17,472	-	16.0%
Occupied Units	14,143	93.9%	16,830	96.3%	19.0%
Vacant Units	914	6.1%	642	3.7%	-29.8%
Study Area	46,379	-	53,300	-	14.9%
Occupied Units	42,754	92.2%	50,639	95.0%	18.4%
Vacant Units	3,625	7.8%	2,661	5.0%	-26.6%

Source: U.S. Census Bureau

The 2019 ACS specifies that in Dublin, 46.9% of the vacant units were “available for rent,” while another 12.0% were “rented but not yet occupied.” The Study Area’s vacancy characteristics mirrors Dublin’s, with slight variations in the “for rent” segment (41.1%) and “for seasonal use” category (16.1%). “Other vacant” units in Dublin accounted for 12.0% of all vacant units, compared to 14.0% for the Study Area as a whole³ (see Table 16).

Table 16: Vacancy Status, 2019

	City of Dublin	%	Study Area	%
Total	642		2,661	
For rent	301	46.9%	1,094	41.1%
Rented, not occupied	77	12.0%	353	13.3%
For sale only	69	10.7%	270	10.1%
Sold, not occupied	42	6.5%	143	5.4%
For seasonal use	76	11.8%	428	16.1%
For migrant workers	0	0.0%	0	0.0%
Other vacant	77	12.0%	373	14.0%

Source: U.S. Census Bureau

³ “Other Vacant” units includes: foreclosed properties; units vacant due to the owners’ preferences and/or personal situation (owner does not want to rent/sell, owner is staying with family, owner is in assisted living, etc.); units vacant due to legal issues or disputes; unoccupiable properties (abandoned/condemned); units needing repairs before they can be sold or rented, and units being repaired; and units used for storage of household furniture.

Table 17 describes changes in tenure, or owner/renter characteristics. In Dublin, the number of renter-occupied units increased by 1,313 units between 2010 and 2019 to comprise 23.9% of the housing stock. This is substantially lower than Study Area’s 40.3% renter rate in 2019—though the growth of renter-occupied units from 2010 to 2019 in the Study Area was slower than the City Dublin’s (24.7% compared to 48.6%, respectively).

Table 17: Housing Tenure, 2010-2019

	2010 ACS	%	2019 ACS	%	% Change 2010-2019
City of Dublin	14,143	-	16,830	-	19.0%
Owner-Occupied Units	11,439	80.9%	12,813	76.1%	12.0%
Renter-Occupied Units	2,704	19.1%	4,017	23.9%	48.6%
Study Area	41,390	-	48,572	-	17.4%
Owner-Occupied Units	25,717	62.1%	29,020	59.7%	12.8%
Renter-Occupied Units	15,673	37.9%	19,552	40.3%	24.7%

Source: U.S. Census Bureau

Compared to the Study Area, the City of Dublin reports a smaller proportion of newer housing stock. According to the 2019 ACS, 8.7% of all housing units in the City of Dublin were built after 2010, compared to 10.9% in the Study Area. The percentage of homes built prior to 1970 are similar (6.0% for the City of Dublin and 6.3% for the Study Area. See Table 18).

Table 18: Age of Housing Stock, 2019

	City of Dublin	%	Study Area	%
Built 2014 or later	679	4.0%	3,084	5.8%
Built 2010 to 2013	784	4.7%	2,749	5.2%
Built 2000 to 2009	3,747	22.3%	8,372	15.7%
Built 1990 to 1999	5,153	30.6%	12,637	23.7%
Built 1980 to 1989	4,319	25.7%	16,399	30.8%
Built 1970 to 1979	1,132	6.7%	6,682	12.5%
Built 1960 to 1969	418	2.5%	1,675	3.1%
Built 1950 to 1959	367	2.2%	755	1.4%
Built 1940 to 1949	45	0.3%	187	0.4%
Built 1939 or earlier	186	1.1%	760	1.4%

Source: U.S. Census Bureau

Summarized in Table 19 shown on the following page, 87.2% of all housing units in the City were built after 1980. The U.S. Census Bureau also reports that renter-occupied homes are newer than owner-occupied homes (18.3% of the renter-occupied housing was built in 2010 or later, compared to 5.7% of owner-occupied homes).

Table 19: Age of Housing Stock by Tenure - City of Dublin, 2019

	All Units		Owner-Occupied		Renter-Occupied	
	Units	%	Units	%	Units	%
Built 2014 or later	679	4.0%	394	3.1%	285	7.1%
Built 2010 to 2013	784	4.7%	334	2.6%	450	11.2%
Built 2000 to 2009	3,747	22.3%	2,922	22.8%	825	20.5%
Built 1990 to 1999	5,153	30.6%	3,951	30.8%	1,202	29.9%
Built 1980 to 1989	4,319	25.7%	3,727	29.1%	592	14.7%
Built 1970 to 1979	1,132	6.7%	771	6.0%	361	9.0%
Built 1960 to 1969	418	2.5%	324	2.5%	94	2.3%
Built 1950 to 1959	367	2.2%	224	1.7%	143	3.6%
Built 1940 to 1949	45	0.3%	45	0.4%	0	0.0%
Built 1939 or earlier	186	1.1%	121	0.9%	65	1.6%

Source: U.S. Census Bureau

Compared to the Study Area, the City of Dublin's housing stock is significantly more dominated by one-unit structures. According to the 2019 ACS, 81.6% of all housing units in the City of Dublin were one-unit structures, compared to 63.9% in the Study Area. The U.S. Census Bureau reports that 7.9% of Dublin's total housing stock are in structures with ten or more units, compared to 14.7% for the Study Area (see Table 20).

Table 20: Units in Structure, 2019

	City of Dublin		Study Area	
	Units	%	Units	%
1 Unit, detached	11,716	69.6%	19,021	51.0%
1 Unit, attached	2,013	12.0%	4,821	12.9%
2 Units	81	0.5%	661	1.8%
3 or 4 Units	672	4.0%	3,175	8.5%
5 to 9 Units	883	5.2%	4,101	11.0%
10 to 19 Units	507	3.0%	2,346	6.3%
20 to 49 Units	413	2.5%	1,165	3.1%
50 or more Units	402	2.4%	1,986	5.3%
Mobile home	143	0.8%	39	0.1%
Boat, RV, van, etc.	-	-	-	-

Source: U.S. Census Bureau

According to the 2019 ACS, 97.3% of the homeowners live in residential structures with just one unit (see Table 21 shown on the following page). Renter households are more evenly distributed in terms of the number of units in a structure, with the largest segment of renters (810 households, or 20.2% of all rental units) living in structures with 5 to 9 units. Just under ten percent (9.6%) of all renter households reside in buildings with 50 or more units.

Table 21: Units in Structure by Tenure - City of Dublin, 2019

	All Units		Owner-Occupied		Renter-Occupied	
		%		%		%
1 Unit, detached	11,716	69.6%	11,017	86.0%	699	17.4%
1 Unit, attached	2,013	12.0%	1,445	11.3%	568	14.1%
2 Units	81	0.5%	0	0.0%	81	2.0%
3 or 4 Units	672	4.0%	52	0.4%	620	15.4%
5 to 9 Units	883	5.2%	73	0.6%	810	20.2%
10 to 19 Units	507	3.0%	38	0.3%	469	11.7%
20 to 49 Units	413	2.5%	30	0.2%	383	9.5%
50 or more Units	402	2.4%	15	0.1%	387	9.6%
Mobile home	143	0.8%	143	1.1%	0	0.0%

Source: U.S. Census Bureau

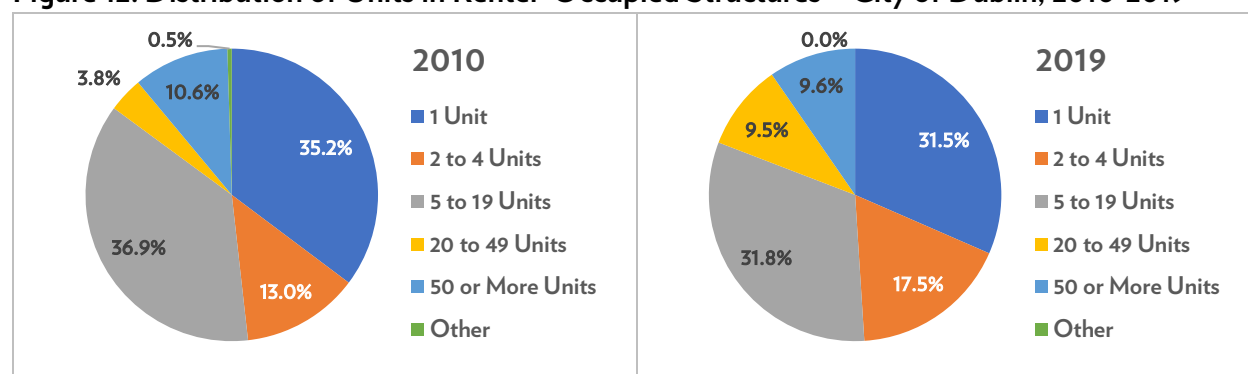
Table 22 and Figure 12 below summarize the distribution of rental homes by units in a structure in the City of Dublin. According to the 2019 ACS, rental homes in single-family structures (both detached and attached) constituted 31.5% of the rental market in Dublin, a decrease from 35.2% reported in 2010. The number of units in larger structures with 20 or more units increased from 390 in 2010 to 770 in 2019.

Table 22: Units in Structure for Rental Homes - City of Dublin, 2010-2019

	2010 ACS		2019 ACS	
		%		%
All Rental Homes	2,704	-	4,017	-
1 Unit, Detached	322	11.9%	699	17.4%
1 Unit, Attached	631	23.3%	568	14.1%
2 Units	62	2.3%	81	2.0%
3 or 4 Units	289	10.7%	620	15.4%
5 to 9 Units	517	19.1%	810	20.2%
10 to 19 Units	480	17.8%	469	11.7%
20 to 49 Units	104	3.8%	383	9.5%
50 or more Units	286	10.6%	387	9.6%
Mobile home	13	0.5%	-	-

Source: U.S. Census Bureau

Figure 12: Distribution of Units in Renter-Occupied Structures – City of Dublin, 2010-2019



Source: U.S. Census Bureau

Income-Restricted Communities in the Study Area

Table 23 is a detailed list of the five income-restricted communities in the Study Area that total 604 units. These units currently represent approximately 3% of the total rental market in the Study Area. The 227 units located within the City of Dublin (at Avondale II, Avondale Woods of Dublin, and Stoneridge Court) represent approximately 6% of Dublin’s rental market. With the exception of Seton Square North, all the income-restricted communities listed below are managed by National Church Residences (formerly known as Ohio Church Residences) which is one of the largest non-profit senior housing providers in the country.

Table 23: List of Income-Restricted Communities – Study Area, 2019

	Name	Address	Location	Type	Subsidized Units	Earliest Expiration Date
1	Abbey Church Village	2914 Bishops Retreat Pl	City of Columbus	LIHTC	159	2026
2	Avondale II	5215 Avery Rd	City of Dublin	LIHTC	100	2033
3	Avondale Woods of Dublin	6516 Delta Loop	City of Dublin	LIHTC	80	2028
4	Seton Square North	1776 Drew Ave	City of Columbus	HUD MF – Section 8	218	2040
5	Stoneridge Court	4105 Stoneridge Ln	City of Dublin	HUD MF – Senior	47	2021

Source: HUD, PolicyMap, Urban Partners

Figure 13: Avondale



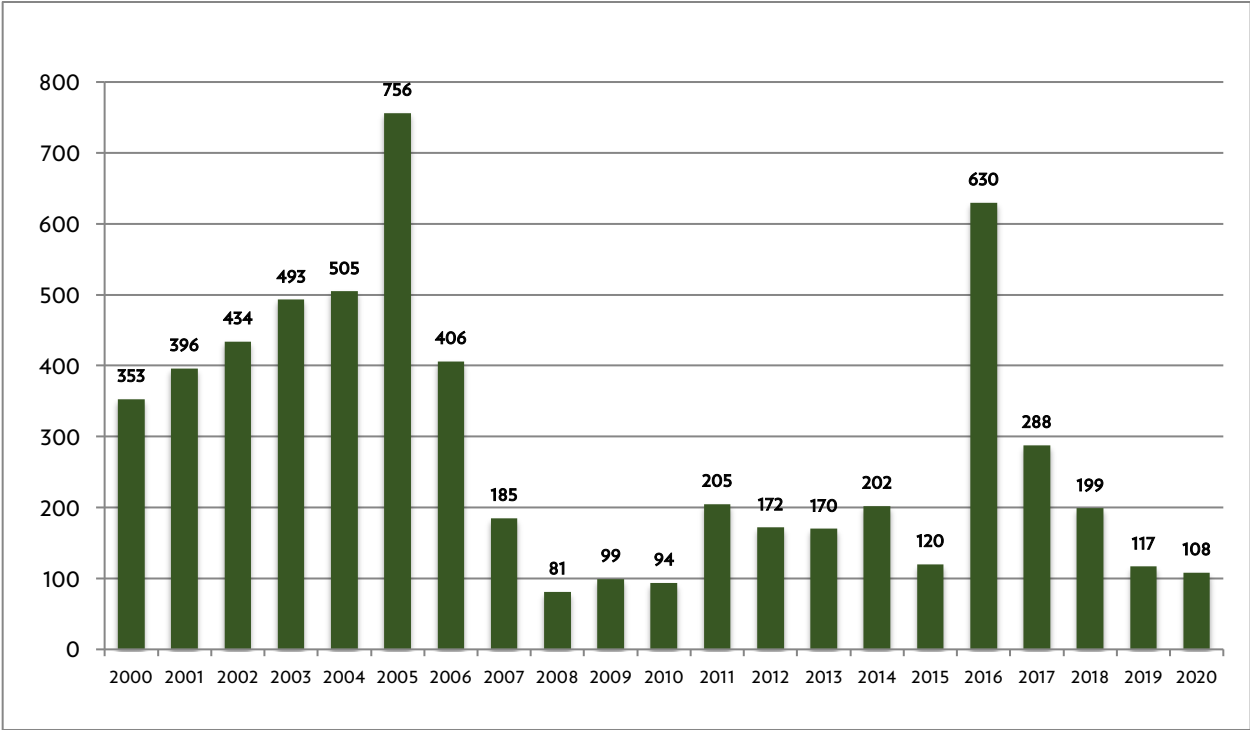
Source: National Church Residences

5. Home Building Activity

Residential Building Permits Issued in Dublin⁴

Shown below in Figure 14 are the U.S. Department of Housing and Urban Development’s data on the number of authorized residential building permits in the City of Dublin. From 2000 to 2020, Dublin issued a total of 6,013 permits, equivalent to 300 units per year. The pace of permitting prior to the Great Recession (2000 to 2007) was approximately 440 units per year. During the Great Recession and the subsequent years of recovery (2008 to 2010), Dublin authorized as few as 81 building permits (in 2008). Aside from 2016-2017 when large numbers of multi-family units were permitted, Dublin has been permitting approximately 160 units per year since 2011.

Figure 14: Building Permits Issued (Total Units), 2000-2020

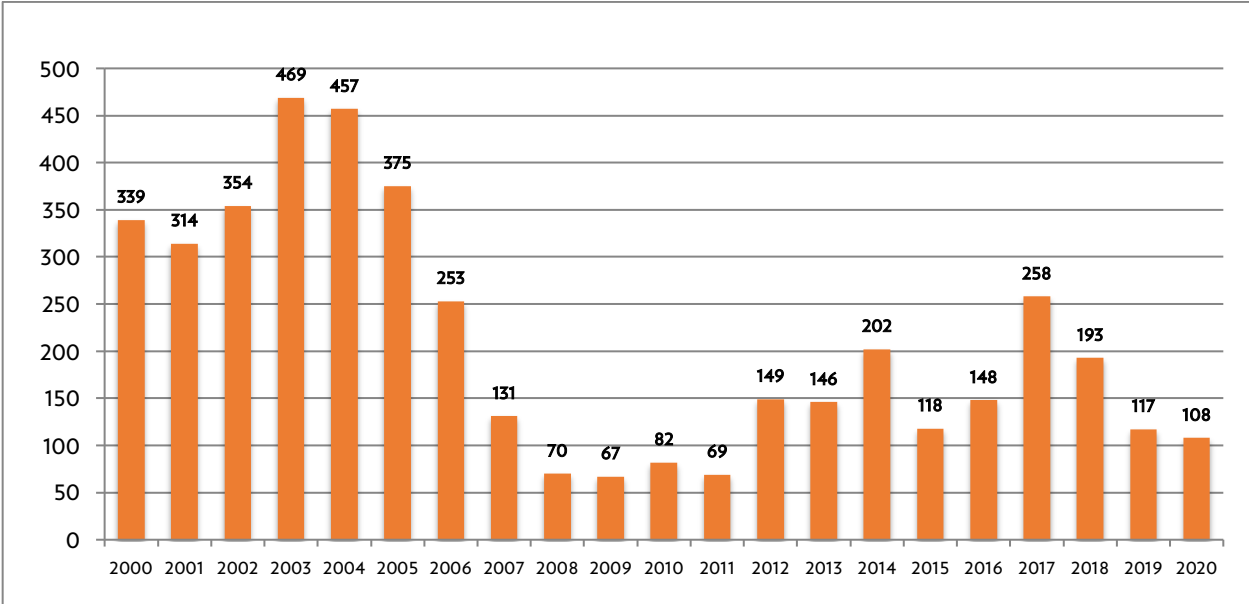


Source: HUD State of the Cities Data Systems (SOCDS), Urban Partners

The peak period for single-family permitting was 2003 to 2004 when 926 units were permitted. Starting in 2006, however, the permitting of single-family homes started to drop precipitously until hitting an average of 72 units per year during the Great Recession and the recovery period (2008 to 2011). From 2012 to 2020, Dublin permitted an average of 160 single-family units per year (see Figure 15 on the following page).

⁴ Though small portions of the City of Dublin are situated in Delaware and Union Counties, this analysis is limited to the Franklin County portion of the City.

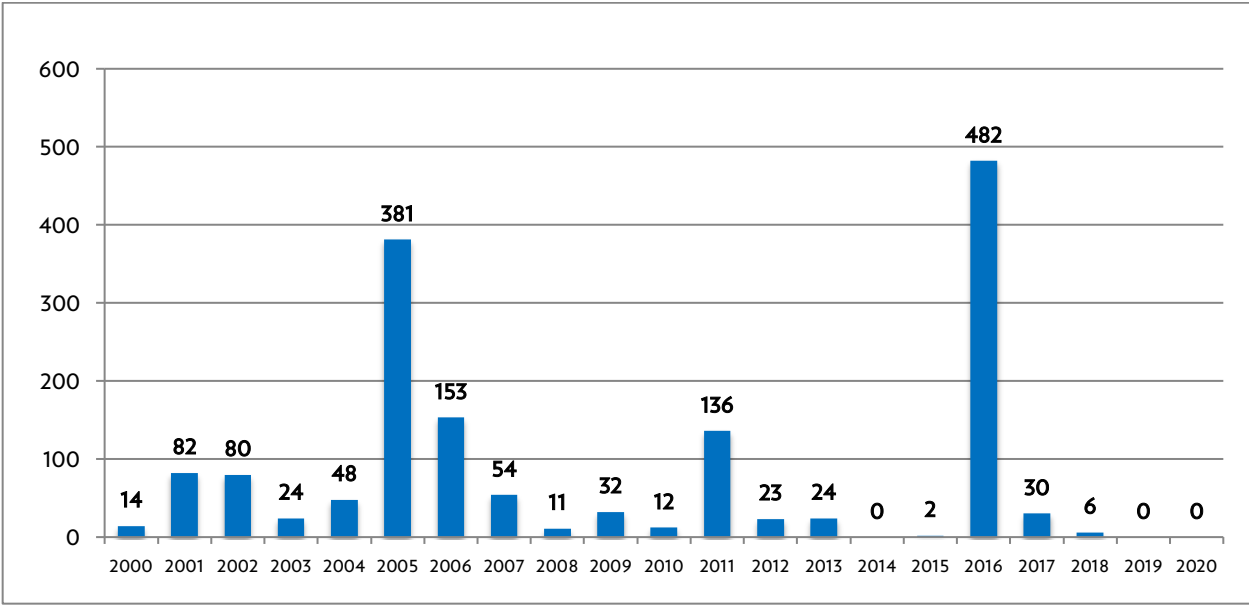
Figure 15: Building Permits Issued (Single-Family Dwellings), 2000-2020



Source: HUD State of the Cities Data Systems (SOCDS), Urban Partners

As illustrated in Figure 16 below, Dublin permitted an average of 76 units annually in multi-family dwellings from 2000 to 2020. There were multiple years when very few or no multi-family permits were issued—including 2019 to 2020—and there were other years when large numbers of units were permitted (i.e., 381 units in 2005, 153 units in 2006, 136 units in 2011, and

Figure 16: Building Permits Issued (Multi-Family Dwellings), 2000-2020

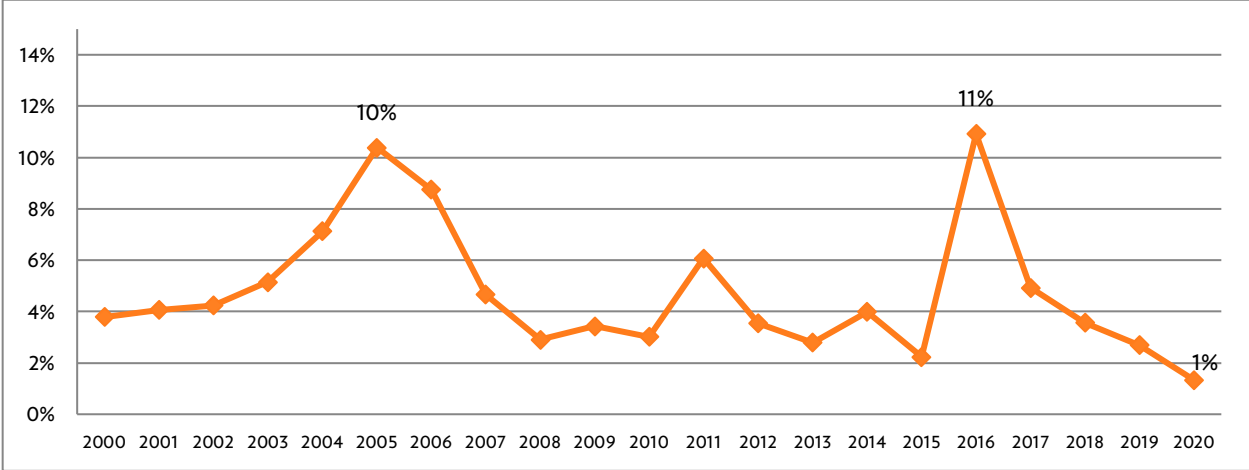


Source: HUD State of the Cities Data Systems (SOCDS), Urban Partners

Comparison of Dublin’s Permitting Activity to Franklin County’s

Figure 17 shows Dublin’s share of the building permits issued in Franklin County. In 2020, building permits issued in Dublin represented just 1% of all residential permits issued in the County—which is significantly lower than the 5% average for 2000 to 2020. The two high points in 2005 (10%) and in 2016 (11%) mirror the issuance of large numbers of multi-family permits.

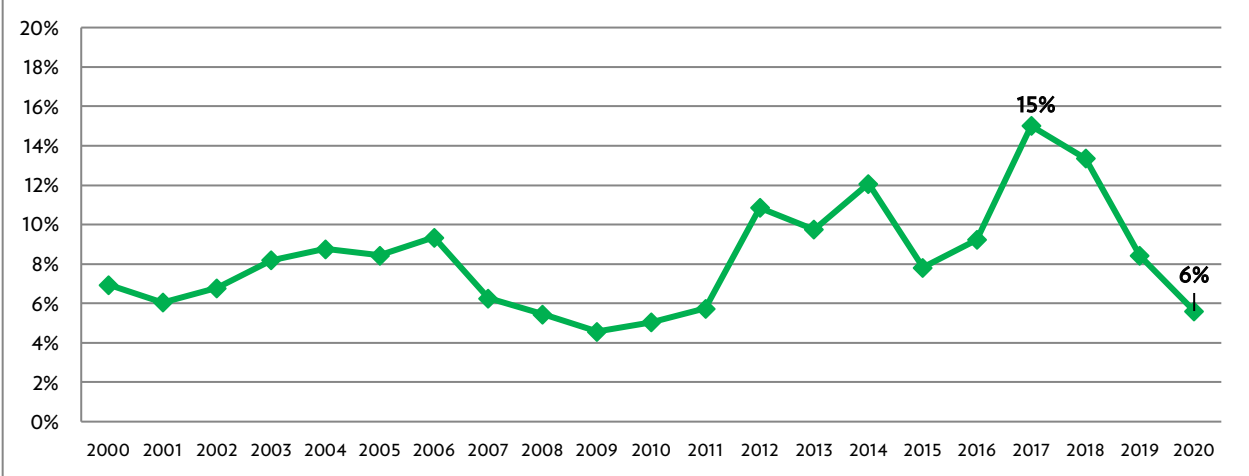
Figure 17: Dublin’s Share of All Building Permits in Franklin County, 2000-2020



Source: HUD State of the Cities Data Systems (SOCDS), Urban Partners

Figure 18 shows Dublin’s share of the single-family building permits issued in Franklin County. In 2020, single-family building permits issued in Dublin (a total of 108) represented 6% of all single-family permits issued in the County—slightly less than the 8% average for the analysis period. The high point was in 2017 when the 258 units issued in Dublin represented 15% of the County’s total.

Figure 18: Dublin’s Share of Single-Family Building Permits in Franklin County, 2000-2020



Source: HUD State of the Cities Data Systems (SOCDS), Urban Partners

6. For-Sale Housing Market Analysis

Summary of Recently Sold Homes

To understand the for-sale housing market in the Study Area, Urban Partners examined market conditions for single-family detached homes, townhomes, and condominiums. By using a comprehensive real estate database service called *RealQuest*, we can gauge pricing information for recently sold homes in the Study Area. For this analysis, we obtained records of home sales for a 5-year period starting in January 2017 and ending in December 2021.

As evidenced by close to 8,000 home sales examined during the 5-year study period, the Study Area’s homeownership market is very active. The median sale price during the 5-year study period was \$320,000, or \$154.02 per square foot, “SF” henceforth). Single-family detached is the dominant home type in the Study Area, representing 71.5% of the sales with a median sale of \$378,500, or \$159.14 per SF. The sale of 1,953 condominium units represented a quarter of all sales in the Study Area (with a median sale price of \$174,000, or \$141.34 per SF), while 288 homes categorized as duplex or triplex were sold for a median price of \$190,000, or \$121.53 per SF. Lastly, townhouse or rowhouse sales comprised less than 1% of all home sales in the Study Area, selling for a median sale price of \$138,000, or \$122.64 per SF (see Table 24).

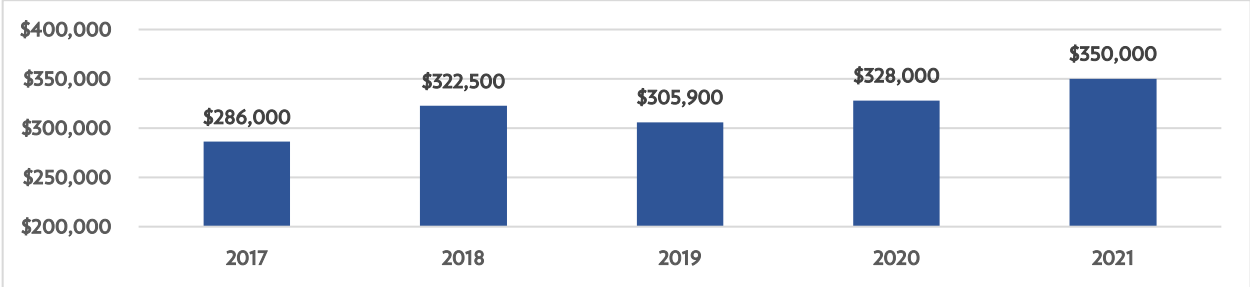
Table 24: Breakdown of Home Sales in Study Area (2017 to 2021)

	No. of Transactions	% of Transactions	Median Sales Price	Median Square Footage	Median Price Per SF
Single-Family Detached	5,650	71.5%	\$378,500	2,335	\$159.14
Condominiums	1,953	24.7%	\$174,000	1,232	\$141.34
Duplex/Triplex	228	2.9%	\$190,000	1,470	\$121.53
Townhouse/Rowhouse	71	0.9%	\$138,000	1,200	\$122.64
Total	7,902	100.0%	\$320,000	2,021	\$154.02

Source: *RealQuest, Urban Partners*

The price of homes in the Study Area has been steadily increasing in the last five years, with a one-year exception from 2018 to 2019. In 2017, the median sale price was \$286,000, or \$138.30 per SF. Increasing at an annualized rate of 5.2%, the median sale price reported in 2021 was \$350,000, or \$182.13 per SF (See Figure 19).

Figure 19: Median Sale Price by Year Home Sold (2017-2021)



Source: *RealQuest, Urban Partners*

Table 25 illustrates the pricing variance between the City of Dublin and the portions of the Study Area located outside of Dublin. During the 5-year study period, homes within Dublin commanded prices that were 65.0% higher than Study Area homes outside the City (with a median sale price of \$428,000, compared to \$259,350). Upon closer examination, the sale price per SF in Dublin was just 9.0% higher (\$161.59 per SF compared to \$148.22 per SF) but the size of the homes was much more of a factor in the overall sale prices. The median home size for Dublin homes were 58.1% larger (2,610 SF compared to 1,651 SF).

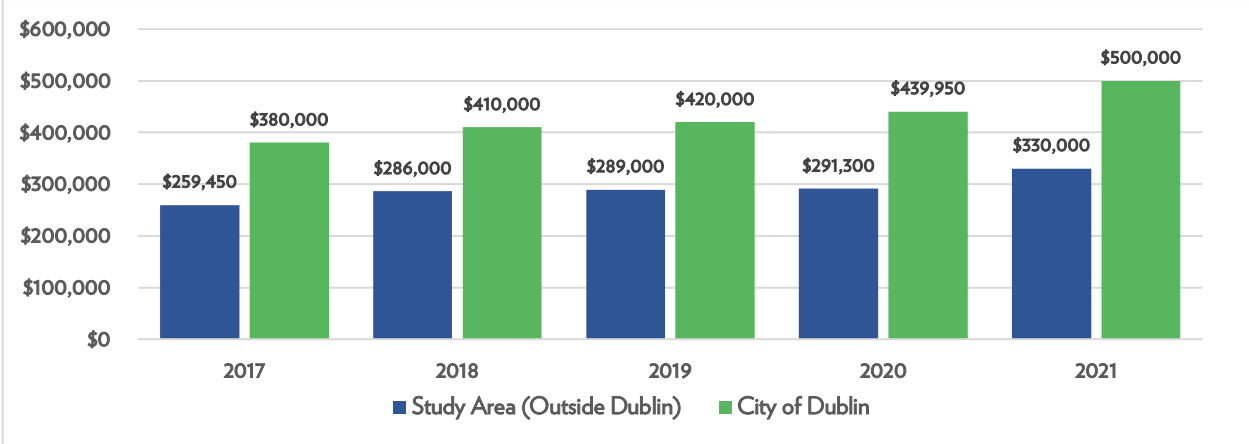
Table 25: Comparison of Home Sale Prices in Study Area, City of Dublin (2017 to 2021)

	No. of Transactions	% of Transactions	Median Sales Price	Median Square Footage	Median Price Per SF
Study Area (Outside the City of Dublin)					
Single-Family Detached	3,235	67.2%	\$294,600	1,918	\$154.23
Condominiums	1,357	28.2%	\$162,000	1,152	\$136.82
Duplex/Triplex	159	3.3%	\$190,000	1,376	\$120.86
Townhouse/Rowhouse	66	1.4%	\$134,500	1,200	\$117.68
Total	4,817	100.0%	\$259,350	1,651	\$148.22
City of Dublin					
Single-Family Detached	2,415	78.3%	\$459,900	2,833	\$164.43
Condominiums	596	19.3%	\$235,000	1,513	\$152.38
Duplex/Triplex	69	2.2%	\$182,200	1,630	\$122.70
Townhouse/Rowhouse	5	0.2%	\$280,000	1,649	\$160.64
Total	3,085	100.0%	\$428,000	2,610	\$161.59

Source: RealQuest, Urban Partners

In Figure 20, the Study Area’s median home prices per year are disaggregated to compare Dublin to the portions of the Study Area located outside of the City. From 2017 to 2021, the median sale price rose by 31.6% in the City of Dublin and 27.2% in the Study Area outside of Dublin. In 2021, the median sale price of homes sold in Dublin was \$500,000.

Figure 20: Median Sale Price by Year Home Sold in Study Area, City of Dublin (2017-2021)



Source: RealQuest, Urban Partners

Single-Family Detached Homes

Single-Family Home Sales within the Study Area

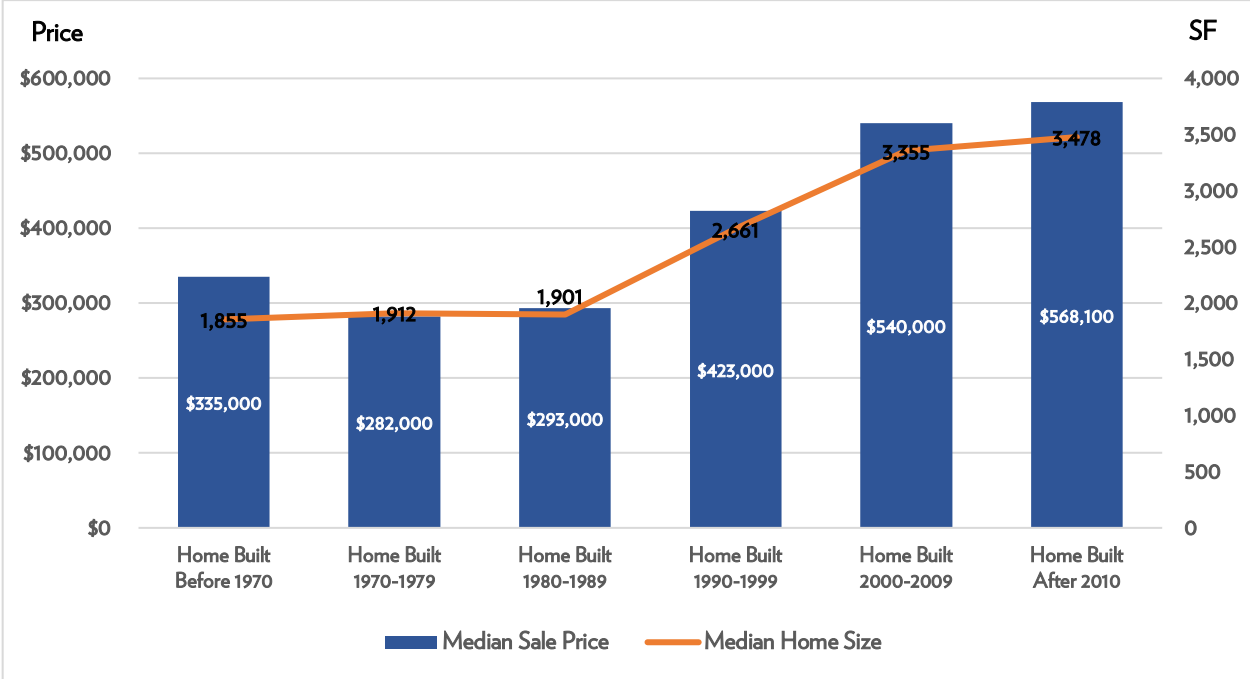
Table 26 summarizes the sales transactions for single-family detached homes by the year homes were built. The median sale price per SF was strong for single-family homes of all ages, but the data shows that the size of the homes progressively became larger over the years, which is resulting in escalating home prices. The median interior living space for homes built before 1970 was 1,855 SF. At \$175.37 per SF, these oldest homes commanded a median sale price of \$335,000 in the 5-year study period. For homes that were built after 2010, the median interior living space was 3,478 SF—escalating the median sale price to \$568,100, though the \$163.66 per SF figure is 7% lower than the oldest homes (see Table 26, Figure 21).

Table 26: Single Family Sales by Age of Home, Study Area (2017-2021)

	No. of Transactions	Median Sales Price	Price Range	Median Square Footage	Median Price Per SF
Home Built Before 1970	246	\$335,000	\$95,000 to \$3,450,000	1,855	\$175.37
Home Built 1970-1979	665	\$282,000	\$110,000 to \$1,690,000	1,912	\$148.36
Home Built 1980-1989	2,240	\$293,000	\$49,400 to \$3,000,000	1,901	\$157.09
Home Built 1990-1999	1,038	\$423,000	\$95,300 to \$3,750,000	2,661	\$161.21
Home Built 2000-2009	612	\$540,000	\$90,000 to \$2,600,000	3,355	\$160.83
Home Built After 2010	530	\$567,900	\$71,700 to \$1,834,000	3,480	\$163.52
No Home Age Information	319	\$516,000	\$43,000 to \$2,400,000	3,154	\$171.46
Total	5,650	\$378,500	\$43,000 to \$3,750,000	2,335	\$159.14

Source: RealQuest, Urban Partners

Figure 21: Median Sale Price/Size of Single-Family Detached Homes by Age of Homes, Study Area



Source: RealQuest, Urban Partners

Single-Family Home Sales within the City of Dublin

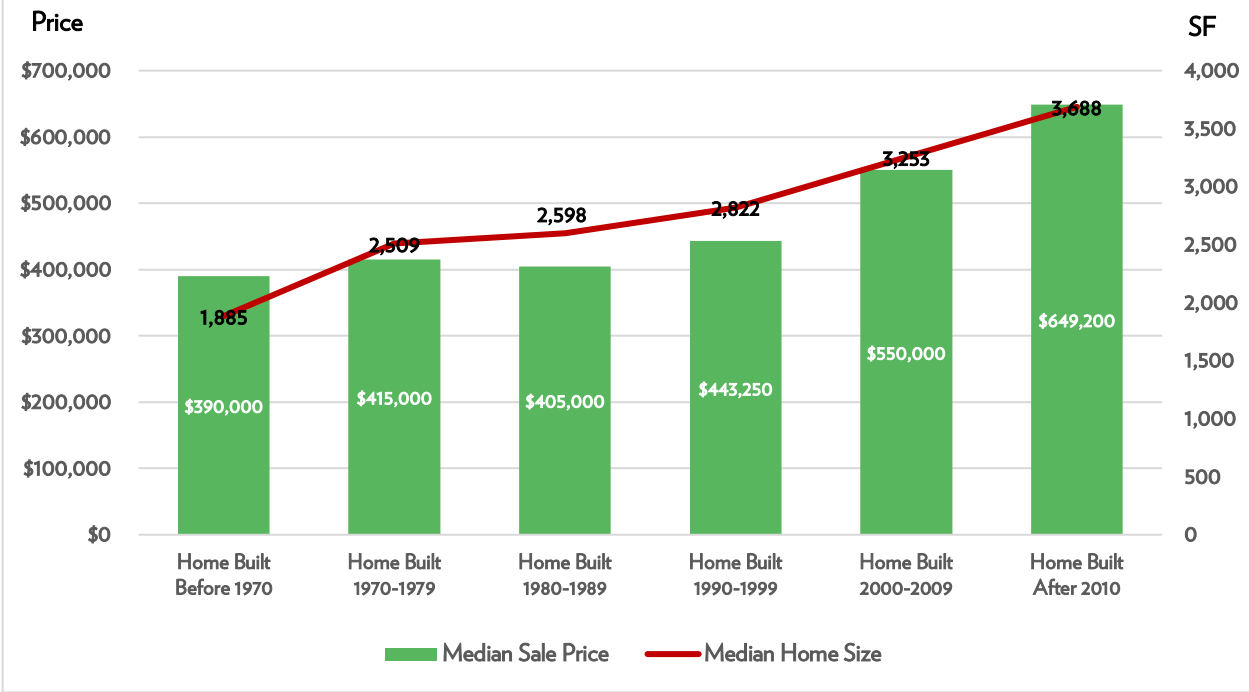
Table 27 summarizes the sales transactions within the City of Dublin for single-family detached homes by the year homes were built. Consistent with trends for the Study Area as a whole, the increasing size of the homes is a major factor in escalating home sale prices. Homes built after 2010 are 47.0% larger than homes built in the 1970s (3,688 SF compared to 2,509 SF. See Table 27, Figure 22).

Table 27: Single Family Sales by Age of Home, City of Dublin (2017-2021)

	No. of Transactions	Median Sales Price	Price Range	Median Square Footage	Median Price Per SF
Home Built Before 1970	116	\$390,000	\$155,000 to \$900,000	1,885	\$194.65
Home Built 1970-1979	128	\$415,000	\$145,000 to \$1,690,000	2,509	\$175.20
Home Built 1980-1989	837	\$405,000	\$49,400to \$3,000,000	2,598	\$159.23
Home Built 1990-1999	694	\$443,250	\$107,400 to \$3,750,000	2,822	\$161.96
Home Built 2000-2009	435	\$550,000	\$90,000 to \$2,600,000	3,253	\$165.56
Home Built After 2010	193	\$649,200	\$77,100 to \$1,834,000	3,688	\$177.89
No Home Age Information	12	\$747,975	\$43,000 to \$1,000,000	3,421	\$183.91
Total	2,415	\$459,900	\$43,000 to \$3,750,000	2,833	\$164.43

Source: RealQuest, Urban Partners

Figure 22: Median Sale Price/Size of Single-Family Detached Homes by Age of Homes, City of Dublin



Source: RealQuest, Urban Partners

Single-Family Home Builder Sales

Table 28 below summarizes single-family detached home sales from home builders and investors. Home builders that sold less than 25 total units in this period were categorized as “Small-Scale Builders” while “Production Builders” are comprised of national/regional residential developers. The top producing Production Builders in the Study Area during this period were:

- M/I Homes (136 sales)
- Epcon (87 sales)
- Pulte (54 sales)
- Rockford (39 sales)
- Bob Webb (36 sales)
- Fischer (36 sales)
- Trinity (33 sales),
- Schottenstein (32 sales)
- Romanelli & Hughes (25 sales)

“Investors” are other non-owner-occupant entities that sold homes during the study period.

The sale prices for the 525 single-family detached homes sold by Production Builders ranged from \$177,900 to \$3.046 million, with a median sale price of \$541,300 (or \$172.48 per SF). The median sale price of single-family detached homes sold by Small-Scale Builders and Investors was \$324,950 (or \$161.02 per SF).

Table 28: Builder/Investor Sold Single-Family Detached Homes (2017 to 2021)

Sold by	No. of Transactions	Median Sales Price	Price Range	Median Square Footage	Median Price Per SF
Production Builder	524	\$541,300	\$177,900 to \$1,834,000	3,342	\$172.48
Small-Scale Builder/Investor	242	\$324,950	\$70,000 to \$1,471,600	2,039	\$161.02
Total	766	\$500,000	\$70,000 to \$1,834,000	2,986	\$168.32

Source: RealQuest, Urban Partners

Single-Family Home Sales by Home Size

Table 29 through Table 32 shown below summarize the sale prices by the size of single-family homes purchased by owner-occupants, as well as the seller type. The median sale price for the smallest homes (less than 2,000 SF) was \$252,800, or \$162.86 per SF.

Table 29: Small Single-Family Homes (2017 to 2021)

Less than 2,000 SF Sold by	No. of Transactions	Median Sales Price	Price Range	Median Square Footage	Median Price Per SF
Production Builder	62	\$385,950	\$177,900 to \$670,600	1,782	\$219.63
Small-Scale Builder/Investor	113	\$260,000	\$70,000 to \$610,000	1,548	\$167.59
Owner-Occupant	1,818	\$250,000	\$43,000 to \$1,080,000	1,548	\$161.11
Other	5	\$205,000	\$65,089 to \$230,000	1,518	\$109.98
Total	1,998	\$252,800	\$43,000 to \$1,080,000	1,560	\$162.86

Source: RealQuest, Urban Partners

Figure 23: Notable Communities in the Small Single-Family Segment



For medium-sized homes (between 2,000 SF and 2,700 SF), the median sale price was \$365,000, or \$157.06 per SF (see Table 30).

Table 30: Medium Single-Family Homes (2017 to 2021)

2,000 to 2,699 SF Sold by	No. of Transactions	Median Sales Price	Price Range	Median Square Footage	Median Price Per SF
Production Builder	83	\$510,500	\$225,100 to \$1,092,782	2,287	\$221.66
Small-Scale Builder/Investor	67	\$363,000	\$240,500 to \$1,150,000	2,268	\$154.65
Owner-Occupant	1,381	\$360,000	\$100,000 to \$1,450,000	2,318	\$155.10
Other	7	\$360,000	\$187,000 to \$468,500	2,400	\$165.80
Total	1,538	\$365,000	\$100,000 to \$1,450,000	2,312	\$157.06

Source: RealQuest, Urban Partners

Figure 24: Notable Communities in the Medium Single-Family Segment



For large homes between 2,700 SF and 3,600 SF, the median sale price was \$490,000, or \$158.08 per SF (see Table 31).

Table 31: Large Single-Family Homes (2017 to 2021)

2,700 to 3,599 SF Sold by	No. of Transactions	Median Sales Price	Price Range	Median Square Footage	Median Price Per SF
Production Builder	185	\$513,600	\$240,000 to \$1,834,000	3,188	\$161.61
Small-Scale Builder/Investor	32	\$496,000	\$280,000 to \$900,000	3,163	\$159.74
Owner-Occupant	1,002	\$485,000	\$168,900 to \$1,562,500	3,062	\$157.27
Other	3	\$420,000	\$275,000 to \$435,000	2,818	\$141.56
Total	1,222	\$490,000	\$168,900 to \$1,834,000	3,084	\$158.08

Source: RealQuest, Urban Partners

Figure 25: Notable Communities in the Large Single-Family Segment



For the largest homes in the Study Area that are over 3,600 SF, the median sale price was \$669,700, or \$157.46 (see Table 32).

Table 32: Very Large Single-Family Homes (2017 to 2021)

3,600 SF or Larger Sold by	No. of Transactions	Median Sales Price	Price Range	Median Square Footage	Median Price Per SF
Production Builder	194	\$648,550	\$384,300 to \$1,184,800	4,070	\$159.12
Small-Scale Builder/Investor	30	\$731,500	\$230,000 to \$1,471,600	4,825	\$148.66
Owner-Occupant	666	\$670,000	\$166,900 to \$3,750,000	4,202	\$157.16
Other	2	\$461,000	\$240,000 to \$682,000	3,960	\$116.47
Total	892	\$669,700	\$166,900 to \$3,750,000	4,172	\$157.46

Source: RealQuest, Urban Partners

Figure 26: Notable Communities in the Very Large Single-Family Segment



Newly Constructed Single-Family Home Sales

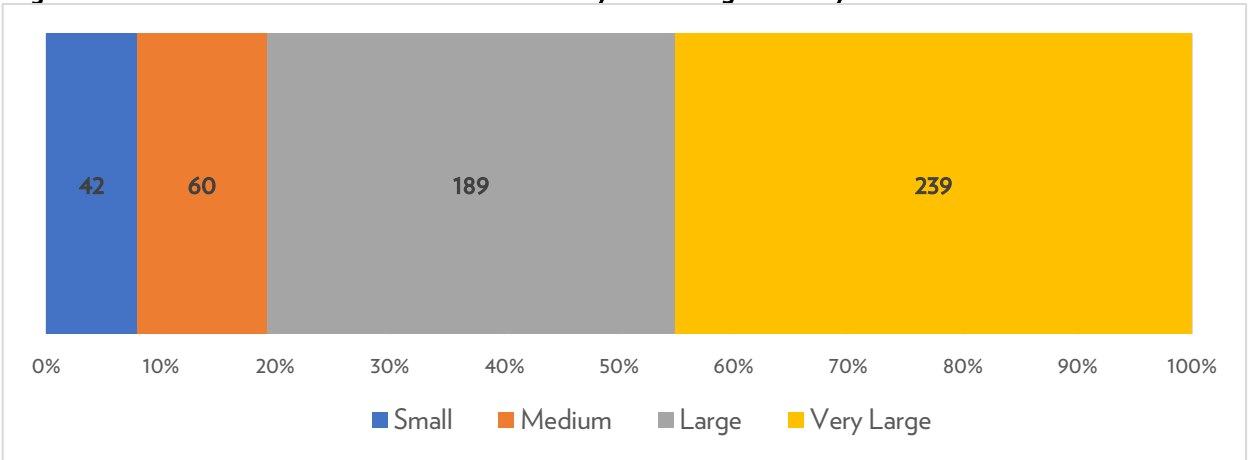
Table 33 shows the size of newly built single-family homes (constructed in 2010 or later). Four out of five homes built in this period were designed with interior living space of 2,700 SF or larger, with 239 (or 45.1%) homes with more than 3,600 SF.

Table 33: Size of Single-Family Homes Built 2010 or Later

	No. of Transactions	% of Transactions	Median Sales Price	Median Square Footage	Median Price Per SF
Small (2,000 SF or less)	42	7.9%	\$359,100	1,791	\$199.58
Medium (2,000 SF to 2,699 SF)	60	11.3%	\$472,500	2,398	\$207.13
Large (2,700 SF to 3,599 SF)	189	35.7%	\$500,900	3,140	\$162.20
Very Large (3,600 SF or larger)	239	45.1%	\$659,500	4,162	\$159.07
All Sizes	530	100.0%	\$568,100	3,478	\$159.14

Source: RealQuest, Urban Partners

Figure 27: Distribution of Home Sizes for Newly Built Single-Family Homes



Source: RealQuest, Urban Partners

Condominiums

Condominium sales represented 24.7% of the total number of residential transactions in the Study Area during the aforementioned 5-year period. Overall, 1,953 condo units were sold for a median sale price of \$174,000, or \$141.34 per SF. There were 115 units sold by production builders at a median sale price of \$480,900, or \$208.50 per SF; while sales between owner-occupants were sold for a median sale price of \$170,000, or \$139.07 per SF (see Table 34).

Table 34: Condominium Sales by Seller Type (2017 to 2021)

	No. of Transactions	Median Sales Price	Price Range	Median Square Footage	Median Price Per SF
Production Builder	115	\$480,900	\$301,700 to \$1,690,200	2,390	\$208.50
Small-Scale Builder/Investor	127	\$156,000	\$45,000 to \$1,500,000	1,152	\$129.78
Owner-Occupant	1,707	\$170,000	\$35,000 to \$1,842,000	1,206	\$139.07
Other	4	\$150,078	\$99,800 to \$205,000	1,437	\$103.70
Total	1,953	\$174,000	\$35,000 to \$1,842,000	1,232	\$141.34

Source: RealQuest, Urban Partners

As summarized in Table 35, the majority of the condominiums sold in the Study Area in the last five years were built in the 1980 and 1990s (a total of 1,358 units, or 69.5% of all condo sales) and command median sale prices of \$158,000 and \$165,700, respectively. Newly built condominiums (constructed in 2010 or later) are commanding strong prices—with median sale price of \$432,150, or \$192.54 per SF. The highest sale price of \$1,842,000 was recorded for a three-bed/3.5 bath, 2-story penthouse at the Bridge Park West Condominiums in January 2021.

Table 35: Condominium Sales by Age of Home (2017-2021)

	No. of Transactions	Median Sales Price	Price Range	Median Square Footage	Median Price Per SF
Home Built Before 1980	165	\$121,900	\$60,000 to \$650,000	1,035	\$116.43
Home Built 1980-1989	664	\$158,000	\$58,400 to \$680,000	1,195	\$130.84
Home Built 1990-1999	694	\$165,700	\$45,000 to \$1,050,000	1,152	\$141.11
Home Built 2000-2009	225	\$289,900	\$60,000 to \$1,092,600	1,635	\$157.23
Home Built After 2010	168	\$432,150	\$50,000 to \$1,842,000	2,340	\$192.54
No Home Age Information	37	\$480,000	\$35,000 to \$1,002,200	2,468	\$202.20
Total	1,953	\$174,000	\$35,000 to \$1,842,000	1,232	\$141.34

Source: RealQuest, Urban Partners

Figure 28: Notable Condominium Communities in the Study Area

	<p>Bridge Park West Riverview Street City of Dublin</p> <p>Total Sales: 38</p> <p>Sale Price Ranges: \$415,700 to \$1,842,000</p> <p>Median Sale Price/ SF: \$353.93</p> <p>Average Home Size: 2,701 SF</p>
	<p>Craughwell Village Inishmore Lane & Craughwell Lane City of Dublin</p> <p>Total Sales: 93</p> <p>Sale Price Ranges: \$75,000 to \$240,000</p> <p>Median Sale Price/ SF: \$112.01</p> <p>Average Home Size: 1,104 SF</p>
	<p>Scioto Crossing Sawmill Road & Scioto Crossing Boulevard City of Dublin</p> <p>Total Sales: 100</p> <p>Sale Price Ranges: \$131,500 to \$467,000</p> <p>Median Sale Price/ SF: \$147.12</p> <p>Average Home Size: 1,619 SF</p>



Dublin Green
 Dublin Granville Road &
 Federated Boulevard
 City of Columbus

Total Sales: 69

Sale Price Ranges:
 \$94,000 to \$292,000

Median Sale Price/ SF:
 \$122.60

Average Home Size:
 1,093 SF



Bethel Commons
 Dierker Road & W. Case Road
 City of Columbus

Total Sales: 145

Sale Price Ranges:
 \$86,000 to \$360,000

Median Sale Price/ SF:
 \$151.37

Average Home Size:
 1,024 SF

Months of Inventory, For-Sale Homes

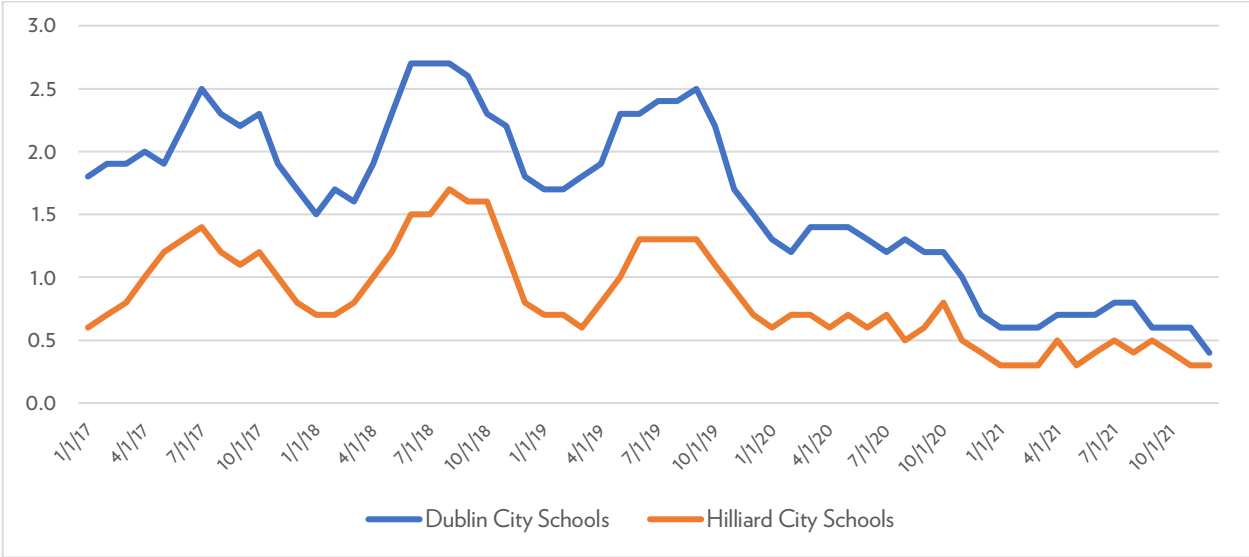
Columbus REALTORS® maintains statistics on residential sales for the Fayette, Franklin, Madison, Morrow, Pickaway and Union counties of Ohio based on the Multiple Listing Service (MLS) data. Typically, home sales that utilize the MLS service represent approximately 90% of all sales reported to the county assessor’s offices.

The Months of Inventory is a useful indicator in determining the size of the for-sale inventory in relation to the number of homes sold. It provides an estimate of the number of months it would take for a typical home to sell if no new listings became available in the area. For instance, if the Months of Inventory number is 5.0, all the current listings can expect to be sold within 5 months. According to the National Association of REALTORS, “six months of

supply is associated with moderate price appreciation, and a lower level of months’ supply tends to push prices up more rapidly.”

Figure 29 illustrates the Months of Inventory for the two Study Area school districts for the 5-year study period. From 2017 to 2019, the Dublin City Schools market area averaged 2.1 months’ supply of single-family homes.⁵ In comparison, the Hilliard City Schools market area maintained a smaller supply of single-family homes for sale, averaging 1.1 months’ supply for the same period. Starting in the first quarter of 2020 which coincides with the start of the COVID-19 pandemic, the supply of homes tightened even more for both school district market areas. Starting from January of 2020, the Dublin City Schools market area averaged 0.9 months of inventory and ended with 0.4 months’ supply in December of 2021, while the Hilliard City Schools market area averaged 0.5 months of inventory for the same period, peaking at 0.8 months’ supply in October of 2021 and ended at 0.3 months of inventory in December of 2021.

Figure 29: Months of Inventory of Homes for Sale by Study Area School Districts, 2017 to 2021

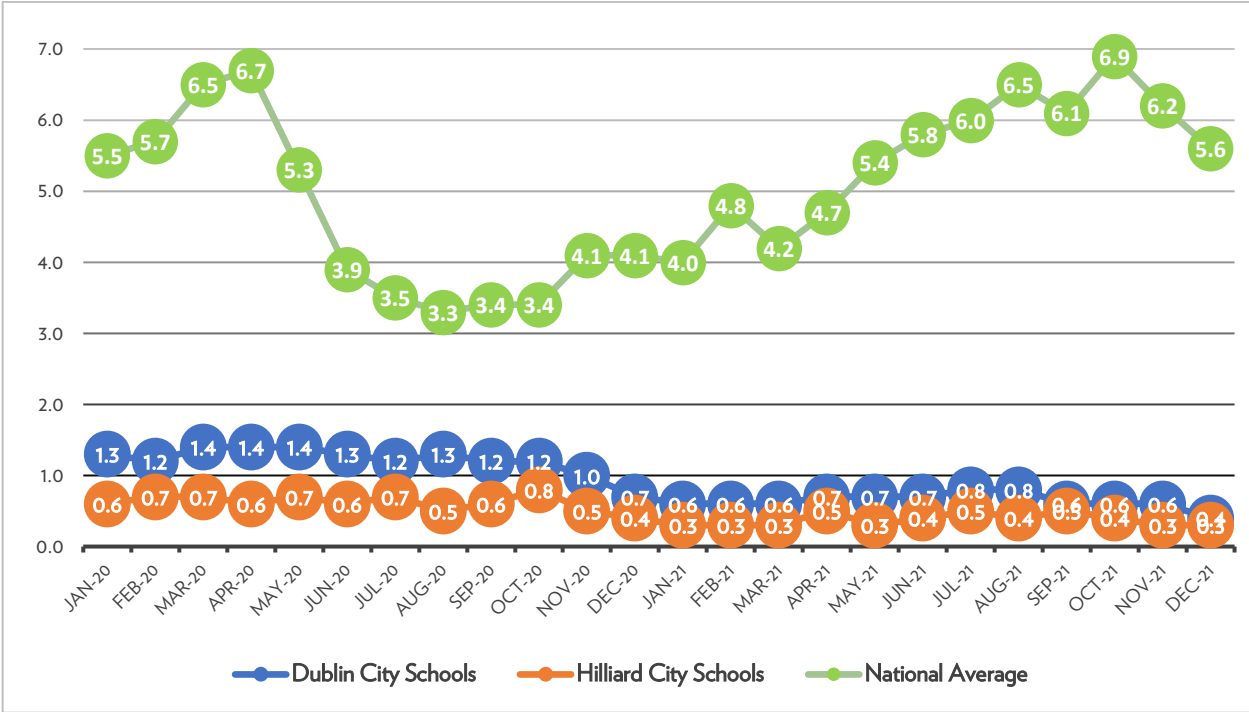


Source: Columbus REALTORS®, Urban Partners

Compared to the national average, the Study Area’s Months of Inventory for single-family homes is extremely low, indicating a limited supply of homes and pointing to a rapid escalation of housing prices. In January of 2020, the two Study Area school districts maintained 1.3 and 0.6 months of single-family inventory, compared to the national average of 5.5 months. In the fourth quarter of 2020 when the national average was slowly replenishing the low supply reported the start of the COVID-19 pandemic, the Study Area markets tightened even further, dipping below 1.0 months’ supply and remaining below that level for the duration of 2021 (see Figure 3 shown on the following page).

⁵ Single family Months of Inventory figures also include Townhomes and Condominiums.

Figure 30: Months of SFR Inventory for Study Area and U.S. Average, 2020 to 2021



Source: Federal Reserve of St. Louis, Columbus REALTORS®, Urban Partners

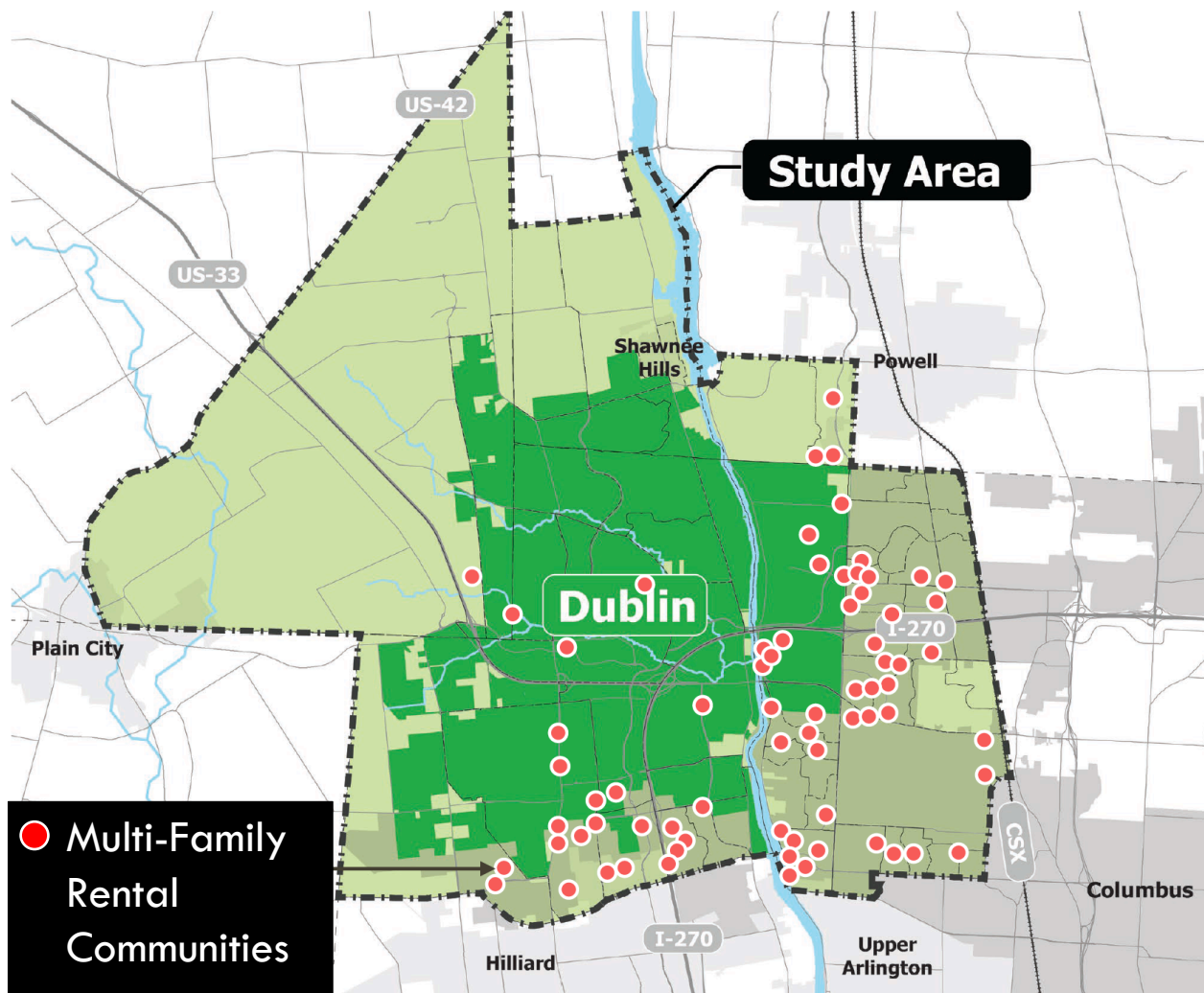
7. Rental Housing Market Analysis

To understand the market-rate rental housing market in the Study Area, Urban Partners examined market conditions for multi-family rental housing complexes as well as individual rental units found in single-family detached homes.

Multi-Family Rental Housing Complexes

This analysis involves the examination of 17,544 units offered in 72 market-rate, multi-family rental complexes located in the Study Area. As illustrated in Figure 31 below, most of the complexes in the Study Area are located to the south and east of the City of Dublin, with Dublin's share of the supply as of this report at 21% (total of 3,592 units in 13 communities).

Figure 31: Locations of Multi-Family Rental Complexes in the Study Area







The following is a list of the 13 multi-family rental communities located in the City of Dublin:

- Bridge Park 720 units (2017)
- Asherton at Dublin 514 units (1987)
- Tuller Flats 420 units (2017)
- Britton Woods 352 units (1992)
- Sycamore Ridge 270 units (1996)
- The Crossings at Avery 223 units (2001)
- Tuttle Parke 200 units (1997)
- Gage Crossing 196 units (2018)
- Perimeter Lakes 189 units (1992)
- The Residences at Scioto Crossing 174 units (2006)
- Garden Farms 168 units (2005)
- Hawthorne Commons 86 units (2017)
- Turkey Run Village 80 units (1980)

Figure 32 shown below details the top performing multi-family complexes in terms of key unit/community amenities, total units, and the age of the community to demonstrate the variety that exists throughout the Study Area.

Figure 32: Select Rental Housing Complexes Representing the Variety in Study Area

		<p>Jerome Grand 7027 Park Mill Drive, Plain City</p> <p>Total Units: 300 Built: 2019 Type: 2-Story Low-Rise & Townhouses</p> <p>Key Unit Amenities:</p> <ul style="list-style-type: none"> • Stainless appliances/granite counters • Vaulted ceilings • Walk-in closets • Patio <p>Key Community Amenities:</p> <ul style="list-style-type: none"> • Pool and clubhouse • Fitness center • Business center • Grill/picnic area • Pet play area
		<p>Asherton at Dublin 5400 Asherton Boulevard, Dublin</p> <p>Total Units: 514 Built: 1987 Type: 2-Story Low-Rise</p> <p>Key Unit Amenities:</p> <ul style="list-style-type: none"> • Stainless appliances • Walk-in closets • Vaulted ceilings • Patio/deck <p>Key Community Amenities:</p> <ul style="list-style-type: none"> • Pool and clubhouse • Fitness center • Tennis court • Storage space • Pond and walking/biking trails



Perimeter Lakes Apartments
6146 Perimeter Lakes Drive, Dublin

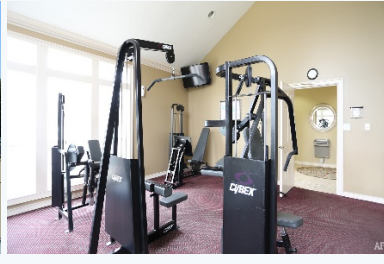
Total Units: 189
Built: 1992
Type: 2-Story Low-Rise

Key Unit Amenities:

- In-unit washer/dryers
- Fireplace
- Walk-in closets
- Patio/deck

Key Community Amenities:

- Pool and clubhouse
- Fitness center
- Business center
- Grill area
- Car wash area



The Crossings at Avery
6200 Avery Crossing Boulevard, Dublin

Total Units: 223
Built: 2001
Type: 2-Story Low-Rise & Townhouses

Key Unit Amenities:

- In-unit washer/dryers
- Walk-in closets
- Fireplace
- Vaulted ceilings

Key Community Amenities:

- Pool and clubhouse
- Fitness center
- Business center
- Tennis court
- Media center/movie theater



The Pines at Tuttle Crossing
5303 Wilcox Road, Dublin

Total Units: 598
Built: 2014
Type: 2-Story Low-Rise & Townhouses

Key Unit Amenities:

- Stainless appliances/granite counters
- In-unit washer/dryers
- Walk-in closets
- Loft layout

Key Community Amenities:

- Pool and clubhouse
- Fitness center and sauna
- Business center
- Movie theater/media center
- Car wash



Greydon House Apartments

5284 Avery Road, Dublin

Total Units: 144

Built: 2018

Type: 3-Story Mid-Rise

Key Unit Amenities:

- Stainless appliances/granite counters
- Hardwood floors and carpet
- Walk-in closets
- Patio/deck

Key Community Amenities:

- Pool
- Clubhouse
- Fitness center
- Business center
- Picnic area and grill



Tuttle's Grove Apartments

5885 Tuttle's Grove Boulevard, Dublin

Total Units: 519

Built: 1994

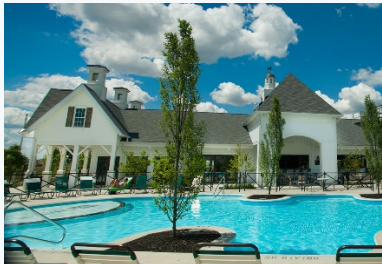
Type: 2-Story Low-Rise

Key Unit Amenities:

- In-unit washer/dryers
- Vaulted ceilings
- Walk-in closets
- Balcony/patio

Key Community Amenities:

- Pool and clubhouse
- Fitness center
- Business center
- Lounge and game room
- Basketball and tennis courts



LC Dublin

5730 Silver Falls Street, Dublin

Total Units: 552

Built: 2009

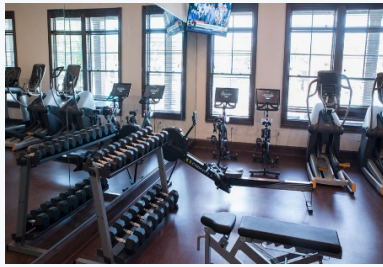
Type: 3-Story Mid-Rise

Key Unit Amenities:

- Stainless appliances
- In-unit washer/dryers
- Hardwood floors
- Walk-in closets
- Den

Key Community Amenities:

- Pool
- Clubhouse
- Fitness center
- Volleyball court



The Charles at Riggins Run
5252 Riggins Run, Columbus

Total Units: 218
Built: 2018
Type: 3-Story Mid-Rise

- Key Unit Amenities:**
- Stainless appliances/granite counters
 - In-unit washer/dryers
 - Walk-in closets
 - Patio/deck

- Key Community Amenities:**
- Pool and clubhouse
 - Fitness center and spa
 - Business center
 - Picnic area
 - Car wash and charging area



Karrick Place of Dublin
5541 Bowland Place, Dublin
Total Units: 540
Built: 1985
Type: 1-Story Low-Rise

- Key Unit Amenities:**
- In-unit washer/dryers
 - Vinyl floors and carpet
 - Walk-in closets
 - Patio/deck

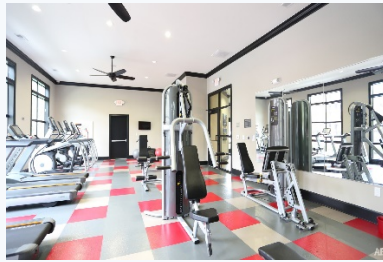
- Key Community Amenities:**
- Pool
 - Sundeck
 - Clubhouse
 - Fitness center
 - Extra storage



Camden Place
4311 Camden Circle, Dublin
Total Units: 238
Built: 1990
Type: 2-Story Low-Rise

- Key Unit Amenities:**
- Kitchen pantry
 - In-unit washer/dryers
 - Carpet
 - Patio/deck

- Key Community Amenities:**
- Pool, sundeck, and spa
 - Clubhouse
 - Lounge
 - Fitness center
 - Pond and waterfalls



Strathmoor Apartments

5541 Bowland Place, Dublin

Total Units: 276

Built: 2014

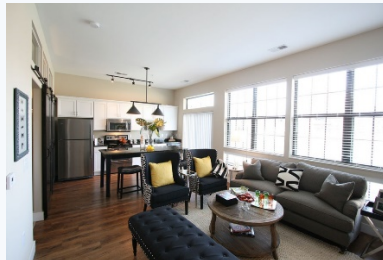
Type: 4-Story Mid-Rise

Key Unit Amenities:

- Stainless appliances/granite counters
- In-unit washer/dryers
- Hardwood floors and carpet
- Walk-in closets
- Patio/deck

Key Community Amenities:

- Pool, sundeck, and clubhouse
- Lounge
- Fitness center
- Business center
- Extra storage and bike storage



Hayden Lofts

4125 Hayden Lofts Place, Dublin

Total Units: 273

Built: 2015

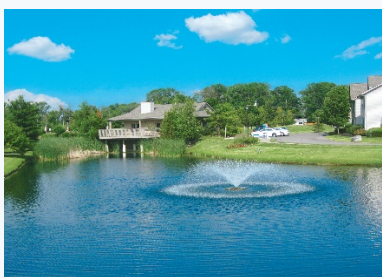
Type: 3-Story Mid-Rise

Key Unit Amenities:

- Stainless appliances
- In-unit washer/dryers
- Hardwood floors
- Balconies

Key Community Amenities:

- Pool and clubhouse
- Fitness center
- Business center and media room
- Pet play area and washing station
- Volleyball court
- Grill and picnic area



Emerald Lakes Apartments

4600 Emerald Lakes Boulevard, Powell

Total Units: 192

Built: 1994

Type: 2-Story Low-Rise

Key Unit Amenities:

- Walk-in closets
- Carpet
- Large bedrooms
- Linen closet

Key Community Amenities:

- Pool
- Fitness center
- Clubhouse
- Walking paths
- Lakes and ponds



Hawthorne Commons

4050 Hawthorne Lane, Dublin

Total Units: 86

Built: 2017

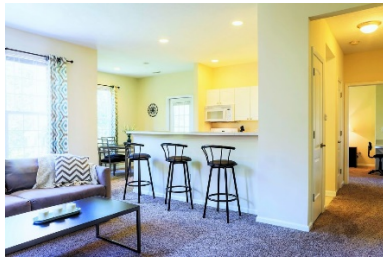
Type: 1-Story Low-Rise with Garage, 55+

Key Unit Amenities:

- Stainless appliances/granite counters
- Walk-in closets
- Fireplace
- Office/den
- Patio/deck

Key Community Amenities:

- Fitness center and business center
- Clubhouse and lounge
- Media room and game room
- Pet play area
- Grill area



The Residences at Scioto Crossing

3900 Suffolk Drive, Dublin

Total Units: 174

Built: 2006

Type: 2-Story Low-Rise

Key Unit Amenities:

- Kitchen island
- In-unit washer/dryers
- Hardwood floors
- Balcony/patio

Key Community Amenities:

- Pool and clubhouse
- Fitness center
- Lounge
- Business center
- Car wash and bike storage



Heathermore & Bedford Commons

2645 Hard Road, Columbus

Total Units: 392

Built: 1988

Type: 2-Story Low-Rise

Key Unit Amenities:

- Stainless appliances
- In-unit washer/dryers
- Walk-in closets
- Vaulted ceilings
- Patio

Key Community Amenities:

- Pool and clubhouse
- Clubhouse
- Business center
- Extra storage
- Courtyard and grill area

		<p>Bridge Park 6741 Longshore Drive, Dublin Total Units: 720 Built: 2017-2022 Type: 5-Story Mid-Rise</p>
		<p>Key Unit Amenities:</p> <ul style="list-style-type: none"> • Elevator • Stainless appliances/granite counters • In-unit washer/dryers • Hardwood floors • Balcony <p>Key Community Amenities:</p> <ul style="list-style-type: none"> • Pool • Rooftop deck • Courtyard with grilling stations • Bike storage • Walking distance to amenities
		<p>Sycamore Ridge Apartments 6700 Sycamore Ridge Boulevard, Dublin Total Units: 270 Built: 1996 Type: 3-Story Mid-Rise</p>
		<p>Key Unit Amenities:</p> <ul style="list-style-type: none"> • In-unit washer/dryers • Walk-in closets • Vaulted ceilings • Fireplace • Patio/balcony <p>Key Community Amenities:</p> <ul style="list-style-type: none"> • Pool and cabana • Fitness center • Courtyard and grill • Pet washing station
		<p>Tuller Flats Apartments 4272 McCune Avenue, Dublin Total Units: 420 Built: 2017 Type: 3-Story Mid-Rise</p>
		<p>Key Unit Amenities:</p> <ul style="list-style-type: none"> • Granite counters • Kitchen island • Linen closet • Patio/deck <p>Key Community Amenities:</p> <ul style="list-style-type: none"> • Pool • Fitness center • Clubhouse and lounge • Sundeck • Walking/biking trails • Grill area



Dublin Square

7331 Skyline Drive, Columbus

Total Units: 354

Built: 2009

Type: 3-Story Mid-Rise

Key Unit Amenities:

- Granite counters
- Walk-in closets
- Linen closet
- Patio/balcony

Key Community Amenities:

- Pool and clubhouse
- Fitness center
- Multi-use room and game room
- Sundeck
- Grill and picnic area



Saw Mill Village Apartments

6900 Sawmill Village Drive, Dublin

Total Units: 340

Built: 1986

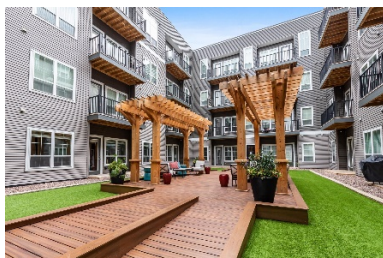
Type: 3-Story Mid-Rise

Key Unit Amenities:

- Stainless appliances
- Pantry
- Walk-in closets
- Vaulted ceilings
- Patio/balcony

Key Community Amenities:

- Pool and clubhouse
- Fitness center
- Grill area
- Pet play area



Luxe at the Highlands

2330 Sawmill Place Boulevard, Columbus

Total Units: 166

Built: 2019

Type: 5-Story Mid-Rise

Key Unit Amenities:

- Stainless appliances
- Kitchen island
- In-unit washer/dryers
- Hardwood floors
- Walk-in closets

Key Community Amenities:

- Pool and clubhouse
- Fitness center and tanning salon
- Business center
- Multi-use room
- Pet washing area



Sawmill Crossing

6700 Allister Way, Columbus

Total Units: 364

Built: 2003

Type: 3-Story Mid-Rise

Key Unit Amenities:

- In-unit washer/dryers
- Carpet and vinyl
- Walk-in closets
- Linen closet

Key Community Amenities:

- Pool
- Fitness center
- Clubhouse
- Sundeck
- Grill area



Riverside Green Apartments

6512 Linchmere Lane, Dublin

Total Units: 166

Built: 1977

Type: 1-Story Low-Rise

Key Unit Amenities:

- Linen closet
- Carpet and vinyl
- Built-in bookshelves
- Patio

Key Community Amenities:

- Laundry facility
- Extra storage



Riverside Village Apartments

3170-3194 Bethel Road, Columbus

Total Units: 90

Built: 1989

Type: 2-Story Low-Rise

Key Unit Amenities:

- Updated decor
- Walk-in closets
- Carpet and vinyl
- Linen closet

Key Community Amenities:

- Laundry facility
- Controlled access
- Grill area



Reserve at Sawmill Ravine

3116 Hayden Road, Dublin

Total Units: 213

Built: 1978

Type: 2-Story Low-Rise & Townhouses

Key Unit Amenities:

- Updated décor
- In-unit washer/dryers
- Walk-in closets
- Carpet

Key Community Amenities:

- Clubhouse
- Business center
- Extra storage



Sterling Place

5399 Coachman Road, Dublin

Total Units: 307

Built: 1990

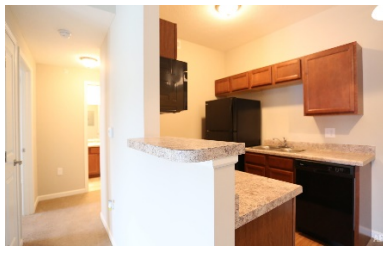
Type: 3-Story Mid-Rise

Key Unit Amenities:

- Stainless appliances and granite counters
- Pantry
- Loft layout
- Patio/balcony

Key Community Amenities:

- Pool and sundeck
- Fitness center
- Clubhouse, lounge, and game room
- Roof terrace
- Basketball court and tennis court
- Pet play and wash area



Braxton on Bethel

1500 Braeton Parkway, Columbus

Total Units: 114

Built: 2016

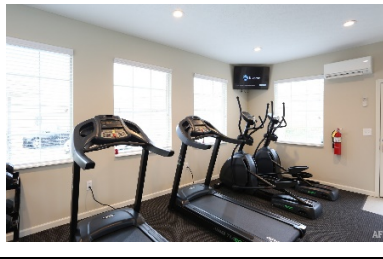
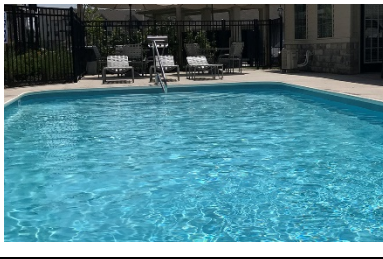
Type: 3-Story Mid-Rise

Key Unit Amenities:

- In-unit washer/dryers
- Hardwood floors
- Patio/balcony

Key Community Amenities:

- Pool
- Fitness center
- Sundeck



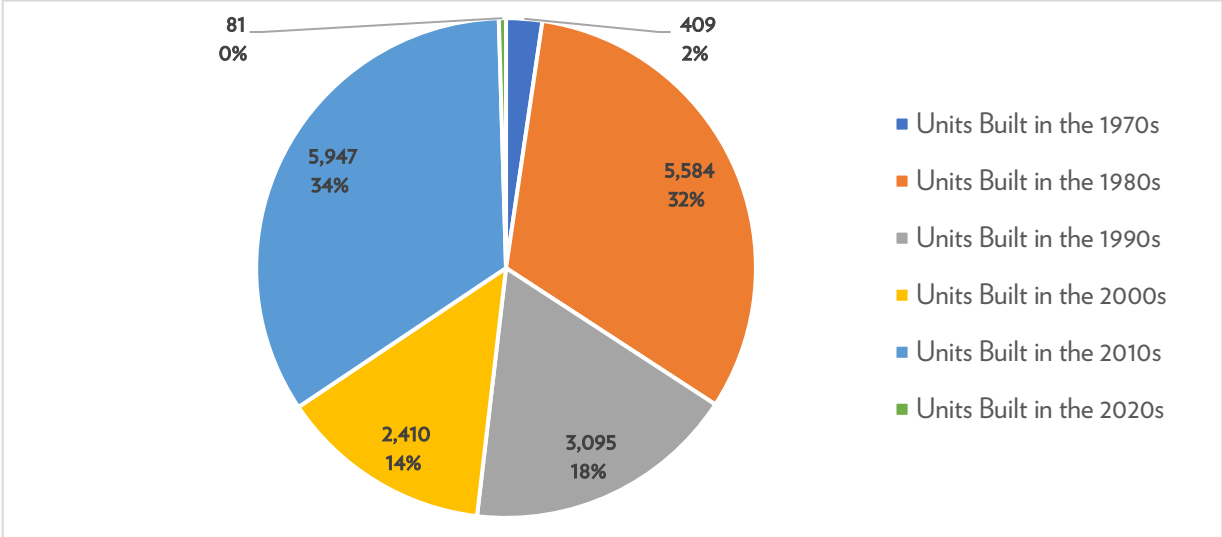
Source: Apartments.com, Apartmentfinder.com, individual complexes, Urban Partners

In Table 36—shown on the following page—summarizes the age, size, rental rate and occupancy information for all 72 market-rate apartment complexes throughout the Study Area.

Age of Complexes

More than 34% of the multi-family rental complexes in the Study Area were built after 2010 (see Figure 33). The complex with the newest apartments as of this report is Bridge Park, the massive multi-phase, multi-building modern development along the Scioto River. While some buildings in Bridge Park began opening in 2017, others have opened more recently, including the 81-unit Waddell in 2020. Future phases of Bridge Park are still in the pipeline, including The Bailey—a proposed 88-unit senior independent living building slated to open in the fall of 2023.

Figure 33: Age of Study Area Multi-Family Rental Homes



Source: Apartments.com, Apartmentfinder.com, Apartmentguide.com, individual complexes, Urban Partners

The previous decade (2010 to 2019) witnessed the greatest number of multi-family units completed in the past 50 years, including five complexes in 2019. These consist of Jerome Grand in Jerome Township and three complexes clustered in the Highlands area—Harper House, Luxe, and Graham Park at the Highlands. The 25 complexes introduced to the Study Area’s rental market in the past decade offer a total of 5,947 units.

The 2000s were a relatively slow period for multi-family rental development in the Study Area. Just eight complexes were built that decade which supplied a total of 2,410 units. The 1990s were only slightly more robust than the 2000s, in terms of number of multi-family rental units constructed, with a total of 3,095 built. However, these units were distributed among 14 complexes, with several buildings being much smaller than those constructed the following decade.

Table 36: Market-Rate Rental Characteristics for Multi-Family Complexes in the Study Area

Name	Address	City	Year Opened	Units	Type	Rent	Size	Rent/SF	Availability (2/22)	Availability (3/22+)
Bridge Park	6741 Longshore Street	Dublin	2017-2023	720	Studio	\$799-\$1,538	478-615 SF	\$1.67-\$2.50	1	1
					1 Bedroom	\$1,059-\$2,113	737-960 SF	\$1.44-\$2.20	1	1
					2 Bedroom	\$1,769-\$2,587	1,022-1,345 SF	\$1.73-\$1.92	1	0
					3 Bedroom	\$2,570-\$3,289	1,485-2,147 SF	\$1.53-\$1.73	0	0
					4 Bedroom	\$4,121	2,792 SF	\$1.48	0	0
Jerome Grand	7027 Park Mill Drive	Plain City	2019	300	1 Bedroom	N/A	783 SF	N/A	1	0
					2 Bedroom	N/A	1,120-1,264 SF	N/A	3	0
					3 Bedroom	N/A	1,651 SF	N/A	1	0
Harper House at the Highlands	2350 Sawmill Place Boulevard	Columbus	2019	217	1 Bedroom	\$1,299-\$1,404	595-850 SF	\$1.65-\$2.18	3	8
					2 Bedroom	\$1,632-\$1,691	1,023-1,194 SF	\$1.42-\$1.60	6	1
Luxe at the Highlands	2330 Sawmill Place Boulevard	Columbus	2019	166	1 Bedroom	\$1,441-\$1,825	813-1,155 SF	\$1.58-\$1.77	7	3
					2 Bedroom	\$2,007-\$2,095	1,115-1,122 SF	\$1.80-\$1.87	3	6
Graham Park at the Highlands	2930 Harper Isabelle	Columbus	2019	216	1 Bedroom	\$1,291	675 SF	\$1.92	1	0
					2 Bedroom	\$1,748-\$1,764	1,038-1,135 SF	\$1.55-\$1.64	6	0
Duncan Park	3021 Bethel Road	Columbus	2019	72	1 Bedroom	\$1,275-\$1,280	681 SF	\$1.87-\$1.88	0	3
					2 Bedroom	\$1,485-\$1,630	1,055-1,149 SF	\$1.41-\$1.42	1	4
Greydon House Apartments	5284 Avery Road	Dublin	2018	144	1 Bedroom	\$1,037-\$1,117	675 SF	\$1.54-\$1.65	3	3
					2 Bedroom	\$1,298-\$1,390	1,038-1,135 SF	\$1.22-\$1.25	4	8
Gage Crossing	5927 Avery Road	Dublin	2018	196	1 Bedroom	\$1,050	685 SF	\$1.53	1	0
					2 Bedroom	\$1,170-\$1,245	960-970 SF	\$1.22-\$1.28	2	0
The Charles at Riggins Run	5252 Riggins Run	Dublin	2018	218	1 Bedroom	\$1,156	725-741 SF	\$1.56-\$1.59	0	0
					1 Bedroom	N/A	836-854 SF	N/A	0	0
					2 Bedroom	\$1,559	1,209 SF	\$1.32	0	1
					2 Bedroom	N/A	1,048-1,452 SF	N/A	0	0
Hawthorne Commons	4050 Hawthorne Lane	Dublin	2017	86	1 Bedroom	\$2,158-\$2,318	1,206-1,219 SF	\$1.79-\$1.90	0	0
					2 Bedroom	\$2,261-\$2,807	1,379-1,623 SF	\$1.64-\$1.73	0	0
Tuller Flats Apartments	4272 McCune Avenue	Dublin	2017	420	1 Bedroom	\$1,099-\$1,439	648-855 SF	\$1.68-\$1.70	3	1
					2 Bedroom	\$1,629-\$1,979	1,081-1,290 SF	\$1.51-\$1.53	0	0
The Wendell	4761 Riggins Road	Dublin	2016	182	1 Bedroom	N/A	723-800 SF	N/A	0	0
					2 Bedroom	N/A	1,108-1,720 SF	N/A	0	0
Grafton Park	2980 Mark Andrew Drive	Dublin	2016	252	1 Bedroom	\$1,179-\$1,219	720-778 SF	\$1.57-\$1.64	4	0
					2 Bedroom	\$1,459-\$1,489	1,007-1,053 SF	\$1.12-\$1.14	3	1

Braxton on Bethel	1500 Braeton Parkway	Columbus	2016	114	1 Bedroom	\$1,024-\$1,050	678 SF	\$1.51-\$1.55	0	1
					2 Bedroom	\$1,160-\$1,250	933 SF	\$1.24-\$1.34	1	1
Avery Brook Apartments	5315 Avery Road	Dublin	2015	165	1 Bedroom	\$975-\$1,030	823-844 SF	\$1.18-\$1.22	0	0
					2 Bedroom	\$1,195-\$1,540	1,135-1,207 SF	\$1.05-\$1.28	0	0
Hayden Lofts	4125 Hayden Lofts Place	Dublin	2015	273	1 Bedroom	\$1,273	629 SF	\$2.02	0	1
					1 Bedroom	N/A	625-946 SF	N/A	0	0
					2 Bedroom	N/A	1,072-1,303 SF	N/A	0	0
District at Linworth	2425 W. Dublin-Granville Road	Columbus	2015	326	1 Bedroom	\$1,249-\$1,349	719-816 SF	\$1.65-\$1.74	3	0
					2 Bedroom	\$1,449-\$1,499	1,111-1,202 SF	\$1.25-\$1.30	3	0
					3 Bedroom	\$2,399	1,951 SF	\$1.23	1	0
Berkley House	5300 Riverside Drive	Upper Arlington	2015	255	1 Bedroom	\$1,290-\$1,325	719-834 SF	\$1.59-\$1.79	3	1
					2 Bedroom	\$1,565-N/A	1,061-1,226 SF	\$1.48-N/A	2	1
Scioto Ridge Apartments	5639 Scioto Crest Drive	Dublin	2015	152	1 Bedroom	\$1,068-\$1,208	760-820 SF	\$1.41-\$1.47	0	0
					2 Bedroom	\$1,338-\$1,469	1,072-1,132 SF	\$1.25-\$1.30	0	0
Redwood Dublin	5464 Eagle River Dr.	Dublin	2014	186	2 Bedroom	\$1,739-\$2,001	1,129-1,429 SF	\$1.40-\$1.54	0	0
The Pines at Tuttle Crossing	5303 Wilcox Road	Dublin	2014	598	1 Bedroom	\$1,175-\$1,225	820-882 SF	\$1.27-\$1.31	2	0
					2 Bedroom	\$1,075-\$1,125	1,181 SF	\$0.91-\$0.95	0	0
Strathmoor Apartments	5541 Bowland Boulevard	Dublin	2014	276	Studio	N/A	466 SF	N/A	0	0
					1 Bedroom	\$1,117-\$1,462	684-906 SF	\$1.54-\$1.96	0	4
					1 Bedroom	N/A	570-952 SF	N/A	0	0
					2 Bedroom	\$1,673	1,239 SF	\$1.35	0	1
Madden's Pointe	5548 Madden's Point Lane	Dublin	2014	72	1 Bedroom	\$915	678 SF	\$1.35	0	1
					2 Bedroom	\$980-\$995	933 SF	\$1.05-\$1.07	0	2
Wesbury Park Apartments	6667 Wesbury Park Avenue	Columbus	2013	126	1 Bedroom	\$1,050-\$1,125	720-778 SF	\$1.45-\$1.46	0	2
					2 Bedroom	\$1,294-\$1,325	1,053 SF	\$1.23-\$1.26	2	1
Hilliard Grand	5399 Grand Drive	Dublin	2012	314	1 Bedroom	\$1,080	780 SF	\$1.38	0	1
					2 Bedroom	\$1,430-\$1,530	1,110-1,370 SF	\$1.17-\$1.29	3	0
					3 Bedroom	\$1,995	1,510 SF	\$1.32	1	0
LC Dublin	5730 Silver Falls Street	Dublin	2009	552	1 Bedroom	N/A	750-807 SF	N/A	0	0
					2 Bedroom	N/A	925-1,332 SF	N/A	0	0
Dublin Square Apartments	7331 Skyline Drive	Columbus	2009	354	1 Bedroom	\$1,160-\$1,235	720-778 SF	\$1.59-\$1.61	3	3
					2 Bedroom	\$1,340-\$1,405	1,007-1,168 SF	\$1.20-\$1.33	4	3
The Residences at Scioto Crossing	3900 Suffolk Drive	Dublin	2006	174	1 Bedroom	N/A	820-850 SF	N/A	0	0
					2 Bedroom	\$1,339-\$1,705	1,050-1,220 SF	\$1.28-\$1.40	2	4
					3 Bedroom	N/A	1,250 SF	N/A	0	0

Garden Farms	7200 Garden Farms Parkway	Dublin	2005	168	1 Bedroom	\$925-\$1,199	588-796 SF	\$1.50-\$1.57	0	0
					2 Bedroom	\$1,209-\$1,460	1,008-1,158 SF	\$1.20-\$1.26	0	0
Times Square	4130 Times Square Boulevard	Dublin	2003	355	1 Bedroom	\$993-\$1,104	580-720 SF	\$1.51-\$1.73	0	4
					1 Bedroom	N/A	590-1,150 SF	N/A	0	0
					2 Bedroom	\$1,406-\$1,584	1,125-1,325 SF	\$1.20-\$1.25	1	1
					2 Bedroom	N/A	1,145-1,500 SF	N/A	0	0
Sawmill Crossing	6700 Allister Way	Columbus	2003	364	3 Bedroom	N/A	1,600 SF	N/A	0	0
					Studio	\$949	556 SF	\$1.71	3	0
					1 Bedroom	\$925-N/A	637-1,003 SF	\$1.45-N/A	0	3
The Crossings at Avery	6200 Avery Crossing Boulevard	Dublin	2001	223	2 Bedroom	\$1,169-\$1,339	957-1,214 SF	\$1.10-\$1.22	9	3
					1 Bedroom	\$925-\$955	800 SF	\$1.16-\$1.19	0	0
The Orchard	5353 Wilcox Road	Dublin	2000	220	2 Bedroom	\$1,060-\$1,640	1,000-2,150 SF	\$0.76-\$1.06	0	0
					3 Bedroom	\$1,440-\$1,920	1,600-2,300 SF	\$0.83-\$0.90	0	0
					Studio	N/A	545 SF	N/A	0	0
Tuttle Parke Apartments	5701 Ebner Circle	Dublin	1997	200	1 Bedroom	N/A	700-820 SF	N/A	0	1
					2 Bedroom	N/A	975-1,345 SF	N/A	0	2
					2 Bedroom	\$1,687	1,343-1,395 SF	\$1.21-\$1.26	0	0
					3 Bedroom	N/A	1,620 SF	N/A	0	0
Glenmuir Apartments	2223 Craigsides Drive	Columbus	1996	272	1 Bedroom	\$869	850 SF	\$1.02	0	0
					2 Bedroom	\$1,050-\$1,150	1,050-1,100 SF	\$1.00-\$1.05	0	0
Sycamore Ridge Apartments	6700 Sycamore Ridge Boulevard	Dublin	1996	270	1 Bedroom	\$879-\$984	500-800 SF	\$1.23-\$1.76	0	0
					2 Bedroom	\$1,084-\$1,264	1,000-1,100 SF	\$1.08-\$1.15	0	0
					1 Bedroom	\$1,440-\$1,465	878 SF	\$1.64-\$1.67	1	1
Tuttle's Grove Apartments	5885 Tuttle's Grove Boulevard	Dublin	1994	519	2 Bedroom	\$1,400-\$1,705	1,105-1,350 SF	\$1.26-\$1.27	6	0
					3 Bedroom	\$2,535-\$2,540	1,474 SF	\$1.72	0	3
					1 Bedroom	\$830-\$995	700-800 SF	\$1.19-\$1.24	0	0
Vistas at Wedgewood	5500-5530 Windrift Drive	Powell	1994	192	2 Bedroom	\$1,005-\$1,127	1,000-1,375 SF	\$0.82-\$1.01	0	0
					3 Bedroom	\$1,485-\$1,605	1,600-1,630 SF	\$0.93-\$0.98	0	0
Emerald Lakes	4600 Emerald Lakes Boulevard	Powell	1994	192	1 Bedroom	\$899-\$999	750 SF	\$1.20-\$1.33	0	0
					2 Bedroom	\$999-\$1,199	844 SF	\$1.18-\$1.42	0	0
Perimeter Lakes Apartments	6146 Perimeter Lakes Drive	Dublin	1992	189	1 Bedroom	\$899-\$999	750 SF	\$1.20-\$1.33	1	0
					2 Bedroom	\$999-\$1,199	844 SF	\$1.18-\$1.42	1	0
Perimeter Lakes Apartments	6146 Perimeter Lakes Drive	Dublin	1992	189	1 Bedroom	\$1,060-\$1,145	800 SF	\$1.33-\$1.43	3	2
					2 Bedroom	\$1,590-\$1,635	1,000-1,400 SF	\$1.17-\$1.59	2	2

Britton Woods Apartments	5489 Crescent Ridge Drive	Dublin	1992	352	1 Bedroom	\$1,080-\$1,155	588-805 SF	\$1.43-\$1.84	4	0
					2 Bedroom	\$1,225-\$1,435	977-1,290 SF	\$1.11-\$1.25	6	0
					3 Bedroom	\$2,025	1,282 SF	\$1.58	1	0
Greensview Apartments	4066 Greensview Drive	Powell	1991	96	1 Bedroom	\$799-\$899	750 SF	\$1.07-\$1.20	0	0
					2 Bedroom	\$999	850 SF	\$1.18	0	0
Victoria Place Commons	2001 Queensgate Ln.	Columbus	1991	20	2 Bedroom	\$1,249-\$1,330	1,900 SF	\$0.66-\$0.70	0	0
Camden Place	14311 Camden Circle	Dublin	1990	238	1 Bedroom	\$1,140	740 SF	\$1.54	0	1
					2 Bedroom	\$1,287-\$1,664	978-1,381 SF	\$1.20-\$1.32	1	2
					2 Bedroom	N/A	1,042-1,538 SF	N/A	0	0
Spring Leaf Place	2920 Snouffer Road	Columbus	1990	56	1 Bedroom	N/A	729-920 SF	N/A	0	0
					2 Bedroom	N/A-\$1,705	1,103-1,183 SF	N/A-\$1.44	1	0
Sawmill Ridge	6564 Millridge Circle	Dublin	1990	192	1 Bedroom	\$956	600 SF	\$1.59	3	0
					2 Bedroom	\$1,254	900 SF	\$1.39	1	2
Sterling Place Apartments	5539 Coachman Road	Columbus	1990	307	1 Bedroom	\$1,018-\$1,096	605-850 SF	\$1.29-\$1.68	1	5
					2 Bedroom	\$1,405-\$1,504	1,135-1,400 SF	\$1.07-\$1.24	0	4
					3 Bedroom	\$1,433-\$1,587	1,292 SF	\$1.11-\$1.23	1	1
Copperleaf	8619 Gold Leaf Lane	Dublin	1989	108	2 Bedroom	\$1,098-\$1,158	900 SF	\$1.22-\$1.29	1	1
Riverside Village	3170-3194 Bethel Road	Columbus	1989	90	Studio	\$825-\$875	500 SF	\$1.65-\$1.75	0	0
					1 Bedroom	\$925-\$975	616 SF	\$1.50-\$1.58	0	0
					2 Bedroom	\$1,025-\$1,075	717 SF	\$1.43-\$1.50	0	0
Heathermore & Bedford Commons	2645 Hard Road	Columbus	1988	392	1 Bedroom	\$925-\$980	650 SF	\$1.42-\$1.51	2	3
					2 Bedroom	\$1,150-\$1,515	950-1,650 SF	\$0.92-\$1.21	9	1
Sawmill Place Apartments	7150 Bent Tree Blvd.	Columbus	1988	128	2 Bedroom	\$769	600 SF	\$1.28	0	0
Asherton at Dublin	5400 Asherton Boulevard	Dublin	1987	514	1 Bedroom	\$1,248-\$1,312	868-930 SF	\$1.41-\$1.44	1	2
					1 Bedroom	N/A	731-1,180 SF	N/A	0	0
					2 Bedroom	\$1,498-\$2,014	986-1,637 SF	\$1.23-\$1.52	8	10
					2 Bedroom	N/A	1,294-2,214 SF	N/A	0	0
Olde Mill Lakes Apartments	2677 Collinford Drive	Dublin	1987	264	1 Bedroom	N/A	764 SF	N/A	0	0
					2 Bedroom	\$1,161-\$1,181	1,124-1,209 SF	\$0.98-\$1.03	1	2
TGM Worthington Green Apartments	1739 Wetherburn Drive	Columbus	1987	173	1 Bedroom	\$1,130	874 SF	\$1.29	0	0
					2 Bedroom	\$1,235-\$1,330	1,004 SF	\$1.23-\$1.32	0	3
Bent Tree Apartments	7200 Chadwood Lane	Dublin	1987	256	1 Bedroom	\$1,135	736 SF	\$1.54	1	0
					2 Bedroom	\$1,245-\$1,325	901-1,071 SF	\$1.24-\$1.38	1	0
TGM Meadow View	3300 W. Dublin-Granville Road	Columbus	1987	312	1 Bedroom	\$1,030-\$1,095	646-787 SF	\$1.39-\$1.59	1	7
					2 Bedroom	\$1,380-\$1,395	1,213-1,248 SF	\$1.12-\$1.14	6	0

Arbors of Dublin	2979 Green Arbor Lane	Dublin	1987	288	1 Bedroom	\$1,009-\$1,319	598-1,081 SF	\$1.22-\$1.69	9	3
					2 Bedroom	\$1,329-\$1,350	1,086-1,095 SF	\$1.22-\$1.23	4	1
					3 Bedroom	\$1,509-\$1,524	1,264 SF	\$1.19-\$1.21	2	1
Saw Mill Village Apartments	6900 Sawmill Village Drive	Dublin	1986	340	1 Bedroom	\$1,065-\$1,420	897-1,078 SF	\$1.19-\$1.32	6	3
					2 Bedroom	\$1,205-\$1,350	1,171 SF	\$1.03-\$1.15	3	2
					3 Bedroom	\$1,570-\$1,755	1,273-1,465 SF	\$1.20-\$1.23	2	4
Karric Place of Dublin	3970 Brelsford Lane	Dublin	1985	540	Studio	\$740	300 SF	\$2.47	3	0
					1 Bedroom	\$925-\$1,134	600 SF	\$1.54-\$1.89	3	0
					2 Bedroom	\$1,132-\$1,311	900 SF	\$1.26-\$1.46	3	0
Mill Run Place Apartments	7956 Hamill Drive	Dublin	1985	24	2 Bedroom	\$883-\$939	900 SF	\$0.98-\$1.04	0	0
Abington Village Apartments	2500 Hard Road	Columbus	1985	306	2 Bedroom	\$1,375-\$1,825	1,600 SF	\$0.86-\$1.14	10	0
Montgomery Court Apartments	7884 Rhapsody Drive	Dublin	1985	117	Studio	\$749	288 SF	\$2.06	0	0
					1 Bedroom	\$769-\$824	576 SF	\$1.34-\$1.43	0	0
					2 Bedroom	\$959-\$1,014	864 SF	\$1.11-\$1.17	0	0
Dublin Park	5211 Sawmill Road	Dublin	1985	470	2 Bedroom	\$1,299	1,300 SF	\$1.00	1	0
Island Club	2225 Montego Boulevard	Columbus	1985	308	1 Bedroom	\$1,154-\$1,460	608-890 SF	\$1.64-\$1.90	0	1
					2 Bedroom	\$1,414-\$1,817	780-1,072 SF	\$1.69-\$1.72	0	2
Shadow Lakes Apartments & Townhouses	1349 Island Bay Drive	Columbus	1985	222	1 Bedroom	N/A	N/A	N/A	0	0
					2 Bedroom	N/A	1,383 SF	N/A	0	0
Sawmill Commons Apartments	2555 Summer Drive	Dublin	1984	420	1 Bedroom	\$1,021-\$1,096	756-812 SF	\$1.35	0	3
					2 Bedroom	\$1,179-\$1,364	1,013-1,304 SF	\$1.05-\$1.16	0	3
Sawbury Commons	2637 Sawbury Blvd.	Columbus	1983	96	2 Bedroom	\$1,099	1,080 SF	\$1.02	1	0
Scioto Commons Apartments	6180 Riverside Drive	Dublin	1981	136	2 Bedroom	\$1,050-\$1,225	1,000 SF	\$1.05-\$1.23	0	0
Turkey Run Village	219-225 Perth Drive	Dublin	1980	80	1 Bedroom	\$1,178	758 SF	\$1.55	0	0
					2 Bedroom	\$1,283-\$1,413	955-1,104 SF	\$1.28-\$1.34	0	0
Summerwood Townhomes	1901 Sawbury Blvd.	Columbus	1979	36	2 Bedroom	N/A	1,600 SF	N/A	0	0
Reserve at Sawmill Ravine	3116 Hayden Road	Dublin	1978	213	1 Bedroom	\$1,089	699 SF	\$1.56	1	0
					2 Bedroom	\$1,120-\$1,290	960-975 SF	\$1.17-\$1.32	3	0
Riverside Green Apartments	6512 Linchmere Lane	Dublin	1977	160	Studio	\$700	300 SF	\$2.33	0	0
					1 Bedroom	\$820	600 SF	\$1.37	0	0
					2 Bedroom	\$975	900 SF	\$1.08	0	0

Source: Apartments.com, Apartmentfinder.com, Apartmentguide.com, Rent.com, individual complexes, Urban Partners

In contrast to the 2000's, the 1980s, the 1990s brought significant multi-family rental growth to the Study Area similar to that of the 2010s. During the 1980s, 22 complexes were built containing 5,584 units. The first multi-family apartment complexes in the Study Area dates to the late 1970s, when three buildings containing a total of 409 units were constructed. The oldest multi-family rental complex is the 160-unit Riverside Green Apartments, built in 1977.

Number of Units

Multi-family rental communities in the Study Area are generally large, with an average size of 244 units. When completed, the largest complex in Dublin will be the 702-unit Bridge Park, which consists of multiple residential buildings situated throughout the district managed by a single entity. The next largest development and the largest traditional complex in the Study Area—the Pines at Tuttle Crossing—consists of 598 units. Other larger complexes containing 400 units or more include: Karric Place of Dublin (540 units), LC Dublin (552 units), Asherton at Dublin (514 units), Dublin Park (470 units), and Sawmill Commons and Tuller Flats Apartments (both with 420 units). Thirteen complexes contain between 300 and 400 units, while 18 have 200 to 300 units. There are 32 complexes in the Study Area with less than 200 units.

Rents

Rents at multi-family apartment complexes in the Study Area examined in Table 36 cover a variety of price points—ranging from \$0.64 to \$2.50 SF. The upper end of this scale can be found at Bridge Park, the area's newest and largest multi-family complex that is still under construction. Bridge Park offers studios, one-bedroom, two-bedroom, three-bedroom, and four-bedroom apartments. Amenities there include a pool, bike storage, 24-hour maintenance, outdoor fireplace & grill stations, and immediate proximity to the commercial and recreational assets of the surrounding district. Rents at Bridge Park currently have the following ranges:

- Studio units: \$799 to \$1,538 per month (\$1.67 to \$2.50 per SF)
- One-bedroom units: \$1,059 to \$2,113 per month (\$1.44 to \$2.20 per SF)
- Two-bedroom units: \$1,769 to \$2,587 per month (\$1.73 to \$1.92 per SF)
- Three-bedroom units: \$2,570 to \$3,289 per month (\$1.53 to \$1.73 per SF)
- Four-bedroom unit: \$4,121 per month (\$1.48 per SF)

Aside from Bridge Park, newer complexes constructed since 2010 are commanding the following rent ranges:

- One-bedroom units: \$915 to \$2,318 per month (\$1.35 to \$1.90 per SF)
- Two-bedroom units: \$1,075 to \$2,807 per month (\$0.91 to \$1.73 per SF)
- Three-bedroom units: \$1,995 to \$2,399 per month (\$1.23 to \$1.32 per SF)

By comparison, complexes constructed in the 2000s are commanding the following rent ranges:

- Studio unit: \$949 per month (\$1.71 per SF)
- One-bedroom units: \$925 to \$1,235 per month (\$1.16 to \$1.61 per SF)
- Two-bedroom units: \$1,060 to \$1,705 per month (\$0.76 to \$1.40 per SF)
- Three-bedroom units: \$1,440 to \$1,620 per month (\$1.28 to \$1.40 per SF)

Complexes constructed in the 1990s are commanding the following rent ranges:

- One-bedroom units: \$799 to \$1,465 per month (\$1.07 to \$1.67 per SF)
- Two-bedroom units: \$999 to \$1,705 per month (\$1.18 to \$1.44 per SF)
- Three-bedroom units: \$1,433 to \$2,540 per month (\$1.11 to \$1.72 per SF)

Complexes constructed in the 1980s are commanding the following rent ranges:

- Studio units: \$740 to \$875 per month (\$1.75 to \$2.47 per SF)
- One-bedroom units: \$769 to \$1,460 per month (\$1.34 to \$1.64 per SF)
- Two-bedroom units: \$769 to \$1,825 per month (\$1.14 to \$1.28 per SF)
- Three-bedroom units: \$1,509 to \$1,755 per month (\$1.19 to \$1.20 per SF)

Finally, complexes constructed in the 1970s are commanding the following rent ranges:

- Studio unit: \$700 per month (\$2.33 per SF)
- One-bedroom units: \$820 to \$1,089 per month (\$1.37 to \$1.56 per SF)
- Two-bedroom units: \$975 to \$1,290 per month (\$1.08 to \$1.32 per SF)

As the rent ranges described above show, rents generally become lower as complexes get older. However, in most instances, rents per square foot remain largely consistent or even increase for the older buildings. This indicates that the newer units tend to be larger than the older ones but at the same time, older complexes are remaining comparable to, and competitive with, the newest complexes in terms of quality. Figure 32 above demonstrates that most of the Study Area's multi-family complexes have similar amenities regardless of their age.

Availability

Dublin appears to have an extremely competitive multi-family rental housing market in terms of availability. At the time of this research (February 2022), a total of 213 units were available to rent out of 17,544 total units in the 72 Study Area multi-family rental communities, representing an overall vacancy rate of 1.2%⁶. The Arbors at Dublin reported the highest vacancy rate at 5.2% (15 units available for rent in February 2022). In terms of unit type available in February 2022, there were 7 studio units, 72 one-bedroom units, 125 two-bedroom units, and 9 three-bedroom units.

⁶ Includes units available in February. It does not include units available starting March 1 and after.

Individual Apartments for Rent

Aside from the larger multi-family complexes, additional market-rate rental housing units in the Study Area are found mostly in condominiums, detached homes, duplexes, and townhouses. Most include basic amenities, including in-home washers/dryers, porches or patios, yards, and off-street parking. As of April 2022, there were several such units available for rent (see Table 37).

Table 37: Summary of Available Individual Homes for Rent

Address	City	Year Built	Type	Rent	SF	Rent/SF	BR	BA
1540 Slade Avenue	Columbus	1973	Condo	\$1,000	900	\$1.11	2	1.5
1440 Slade Avenue	Columbus	1973	Condo	\$1,150	900	\$1.28	2	1.5
3858 Carberry Drive	Dublin	2006	Condo	\$1,349	1,504	\$0.90	2	2.0
7917 Verandah Court	Powell	1981	Condo	\$1,350	1,056	\$1.28	2	1.5
6735 Meadow Creek Drive	Columbus	1996	Condo	\$1,350	1,093	\$1.24	2	2.0
3829 Carberry Drive	Dublin	2006	Condo	\$1,420	1,200	\$1.18	2	2.0
2635 Summer Drive	Dublin	1984	Condo	\$1,425	1,380	\$1.03	2	1.5
6239 Craughwell Lane	Dublin	1998	Condo	\$1,500	1,104	\$1.36	2	2.0
2232 Murphy Way	Columbus	1994	Condo	\$1,500	1,200	\$1.25	2	2.0
331 St. Andrews Drive	Dublin	1980	Condo	\$1,600	1,424	\$1.12	2	1.5
2260 Sandman Drive	Columbus	1995	Condo	\$1,695	1,024	\$1.66	2	2.5
7780 Sawmill Road	Dublin	N/A	Condo	\$1,750	1,152	\$1.52	2	2.5
5897 Canyon Creek Drive	Dublin	2007	Condo	\$1,790	1,640	\$1.09	2	2.5
2096 Coleman Drive	Columbus	1994	Condo	\$1,850	1,968	\$0.94	3	2.5
7766 Willowcove Court	Dublin	1982	Detached House	\$1,195	1,000	\$1.20	2	1.5
1421 Snowmass Road	Columbus	N/A	Detached House	\$1,325	1,000	\$1.33	2	1.5
189 N. Chillicothe Street	Plain City	1948	Detached House	\$1,490	720	\$2.07	2	1.0
1855 Fontenay Court	Columbus	1981	Detached House	\$2,300	1,459	\$1.58	2	4.0
7306 Coldstream Drive	Columbus	1983	Detached House	\$2,450	1,839	\$1.33	2	1.5
1600 Barnard Drive	Powell	1983	Detached House	\$1,600	1,000	\$1.60	3	1.0
633 Amston Drive	Dublin	1977	Detached House	\$1,700	1,498	\$1.13	3	2.5
6653 Canaan Circle	Dublin	1981	Detached House	\$1,725	991	\$1.74	3	1.0
6346 W. Mohican Drive	Powell	1900	Detached House	\$1,800	1,376	\$1.31	3	2.0
3932 Oshannon Road	Dublin	1987	Detached House	\$1,800	1,408	\$1.28	3	1.5
5546 Tygart Valley Drive	Dublin	N/A	Detached House	\$1,945	1,818	\$1.07	3	2.5
5849 Buckhannon Street	Dublin	2012	Detached House	\$1,950	2,034	\$0.96	3	2.5
3157 Millbury Avenue	Dublin	1983	Detached House	\$1,995	1,498	\$1.33	3	2.5
1638 Waterstone Court	Columbus	N/A	Detached House	\$2,000	1,000	\$2.00	3	2.0
2033 Queensbridge Drive	Columbus	1977	Detached House	\$2,000	1,168	\$1.71	3	1.5
5436 Goose Falls Drive	Dublin	2016	Detached House	\$2,075	1,213	\$1.71	3	2.0
8811 Seabright Drive	Powell	1983	Detached House	\$2,095	1,162	\$1.80	3	2.0
1760 Weather Stone Lane	Columbus	1987	Detached House	\$2,100	1,274	\$1.65	3	2.0
6349 Dummerston Court	Dublin	1977	Detached House	\$2,100	2,200	\$0.95	3	2.0
8679 Broadacre Drive	Powell	1988	Detached House	\$2,145	1,584	\$1.35	3	1.5
1676 Laramie Drive	Powell	1985	Detached House	\$2,145	1,406	\$1.53	3	1.5
5972 McIntyre Drive	Dublin	1990	Detached House	\$2,230	1,377	\$1.62	3	2.0
6000 Meadows Glen Drive	Dublin	1987	Detached House	\$1,850	1,700	\$1.09	4	2.0
5545 Goose Falls Drive	Dublin	2009	Detached House	\$2,045	1,475	\$1.39	4	1.5
3087 Meadowshire Court	Dublin	1987	Detached House	\$2,150	1,588	\$1.35	4	2.0
5614 Ramblewood Court	Columbus	1977	Detached House	\$2,500	2,450	\$1.02	4	2.5

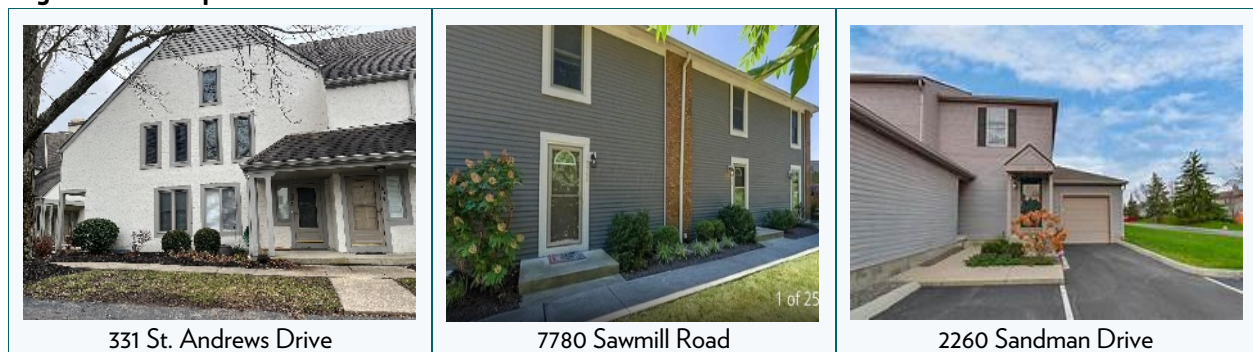
2315 Sawbury Boulevard	Columbus	1982	Detached House	\$2,625	2,334	\$1.12	4	2.5
8222 Longhorn Road	Powell	1984	Detached House	\$2,700	2,728	\$0.99	4	3.0
1921 Shallowford Avenue	Columbus	1977	Detached House	\$2,730	2,282	\$1.20	4	3.0
3087 Strathaven Court	Dublin	1983	Detached House	\$2,805	2,118	\$1.32	4	2.5
7203 Shady Nelms Drive	Dublin	N/A	Detached House	\$2,875	2,640	\$1.09	4	2.5
5602 Braeside Court	Dublin	1988	Detached House	\$3,200	3,548	\$0.90	4	3.0
5598 Dundon Court	Dublin	1991	Detached House	\$5,000	8,000	\$0.63	5	6.0
1690 Hightower Drive	Columbus	N/A	Duplex	\$1,680	1,230	\$1.37	3	2.0
7583 Pickett Lane	Columbus	1983	Duplex	\$1,495	1,540	\$0.97	3	1.5
1748 Watertower Drive	Columbus	1980	Duplex	\$1,295	1,200	\$1.08	3	1.5
3097 Jackielane Drive	Columbus	1971	Townhouse	\$995	1,000	\$1.00	2	1.0
7316 Chaparral Road	Columbus	1984	Townhouse	\$1,019	1,600	\$0.64	2	1.5
7400 Golden Springs Drive	Columbus	N/A	Townhouse	\$1,075	1,100	\$0.98	2	1.5
3122 Jackielane Drive	Columbus	1971	Townhouse	\$1,095	1,000	\$1.10	2	1.0
7367 Chaparral Road	Columbus	1985	Townhouse	\$1,099	1,350	\$0.81	2	1.5
6182 Michaelkenney Lane	Dublin	N/A	Townhouse	\$1,130	1,040	\$1.09	2	1.5
4213 W. Dublin-Granville Rd	Dublin	N/A	Townhouse	\$1,300	1,100	\$1.18	2	1.5
7378 Chaparral Road	Columbus	1984	Townhouse	\$1,325	1,024	\$1.29	2	1.5
1725 Park Village Drive	Columbus	1984	Townhouse	\$1,395	1,608	\$0.87	2	2.5
1656 Park Row Drive	Columbus	1981	Townhouse	\$1,399	1,208	\$1.16	2	2.5

Source: Apartments.com, Zillow.com, Craigslist, Urban Partners

Condominiums

Condominiums for rent in the Study Area as of April 2022 are all two-bedroom units except for one three-bedroom unit. The highest rent commanded among available condominiums is \$1,850 per month for a 1,968 SF three-bedroom home (also the largest available unit), or \$0.94 per SF. This is one of the lowest rents on a square-footage basis among available condominiums for rent. More commonly, condos range from about \$1.10 to \$1.30 per SF, however a couple exceed \$1.50. Overall, rents range from \$1,000 to \$1,790 per month for two-bedroom units.

Figure 34: Sample of Available Condominiums for Rent

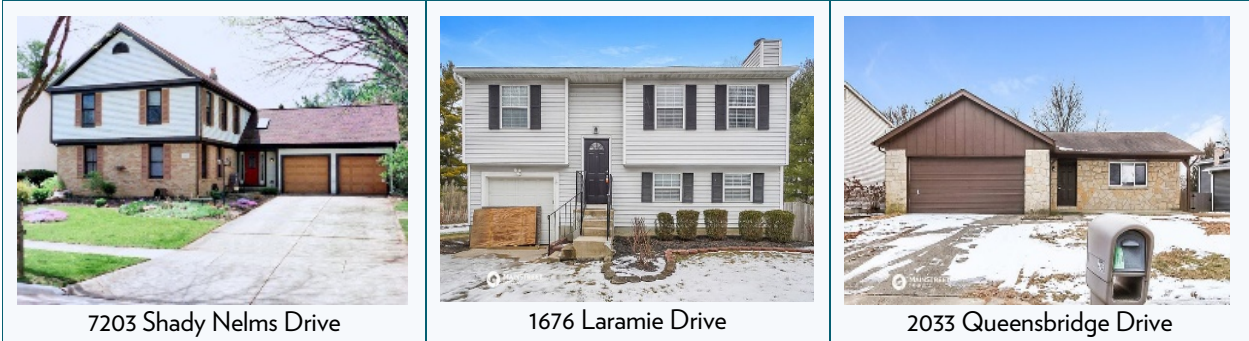


Source: Zillow.com, Urban Partners

Detached Homes

Single-family detached homes for rent in the Study Area as of April 2022 range from two- to five-bedroom units. The highest rent commanded among available detached homes is \$5,000 per month for a large 8,000 SF five-bedroom home (also the largest available detached home), or \$0.63 per SF. This is the lowest rent on a square-footage basis among available detached homes for rent. More commonly, detached homes range from about \$0.90 to \$1.80 per SF, however a few exceed \$2.00. Overall, rents range from \$1,195 to \$2,450 per month for two-bedroom homes; from \$1,600 to \$2,2300 per month for three-bedroom homes; and from \$1,850 to \$3,200 per month for four-bedroom homes.

Figure 35: Sample of Available Detached Homes for Rent



Source: Zillow.com, Urban Partners

Duplexes

As of April 2022, there were just three duplexes available for rent in the Study Area, all three-bedroom units. The highest rent commanded among available duplexes is \$1,680 per month for a 1,230 SF unit, or \$1.37 per SF. This is also the highest rent on a square-footage basis among available duplexes for rent. The other two duplexes are \$0.97 to \$1.08 per SF, with rents of \$1,495 to \$1,295 per month, respectively.

Figure 36: Sample of Available Duplexes for Rent



Source: Zillow.com, Urban Partners

Townhomes

Townhomes for rent in the Study Area as of April 2022 are all two-bedroom units. The highest rent commanded among available condominiums is \$1,399 per month for a 1,208 SF three-bedroom home, or \$1.16 per SF. This is the third-highest rent on a square-footage basis among available townhomes for rent. More commonly, townhomes range from about \$0.81 to \$1.18 per SF. Overall, rents range from \$995 to \$1,399 per month for two-bedroom units.

Figure 37: Sample of Available Townhomes for Rent



Source: Zillow.com, Urban Partners

8. Peer Communities Comparison

For the purpose of benchmarking the City of Dublin to peer communities located in the Columbus Metropolitan Region, as well as other suburban communities in other comparable metropolitan regions, various demographic and housing-related data were examined for the following eleven cities:

Columbus Region

- Delaware, OH
- Hilliard, OH
- Marysville, OH
- New Albany, OH
- Powell, OH
- Upper Arlington, OH
- Westerville, OH
- Worthington, OH

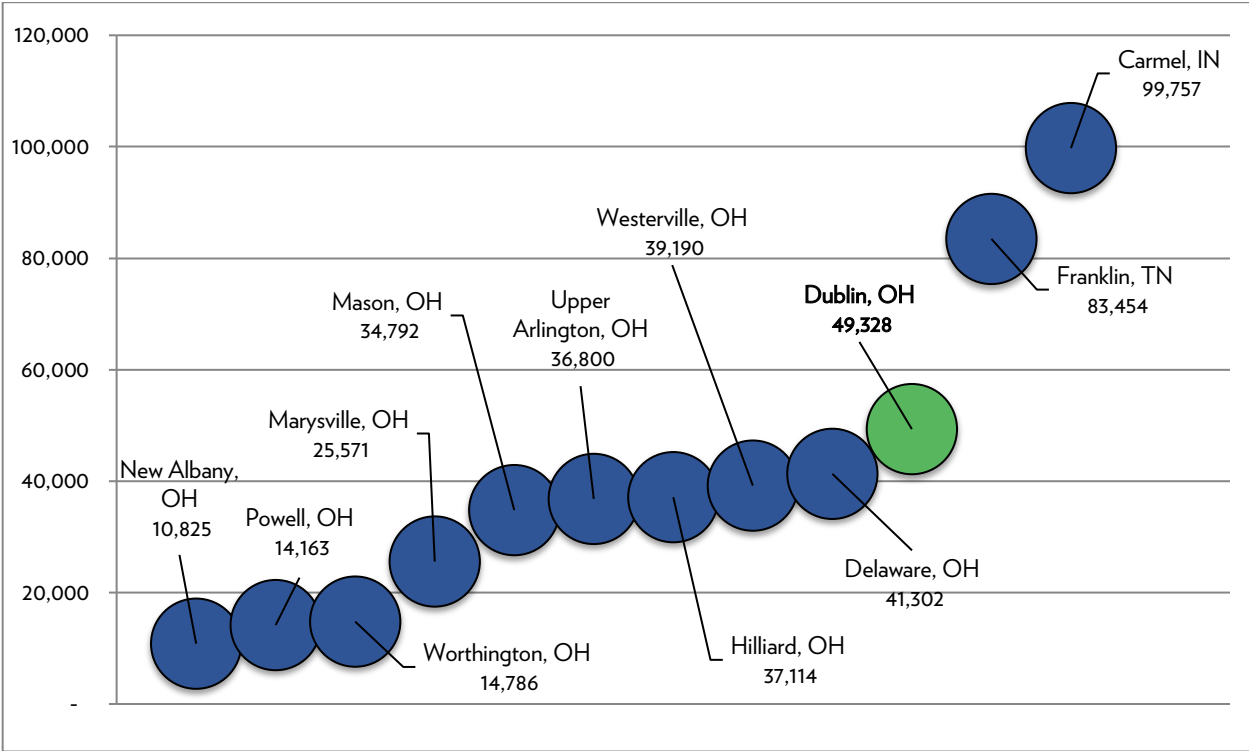
Other Regions

- Franklin, TN (Nashville Metro)
- Carmel, IN (Indianapolis Metro)
- Mason, OH (Cincinnati Metro)

General Demographics

The total population of the examined peer communities ranged from 10,825 residents (New Albany, OH) to 99,757 residents (Carmel, IN, see Figure 38).

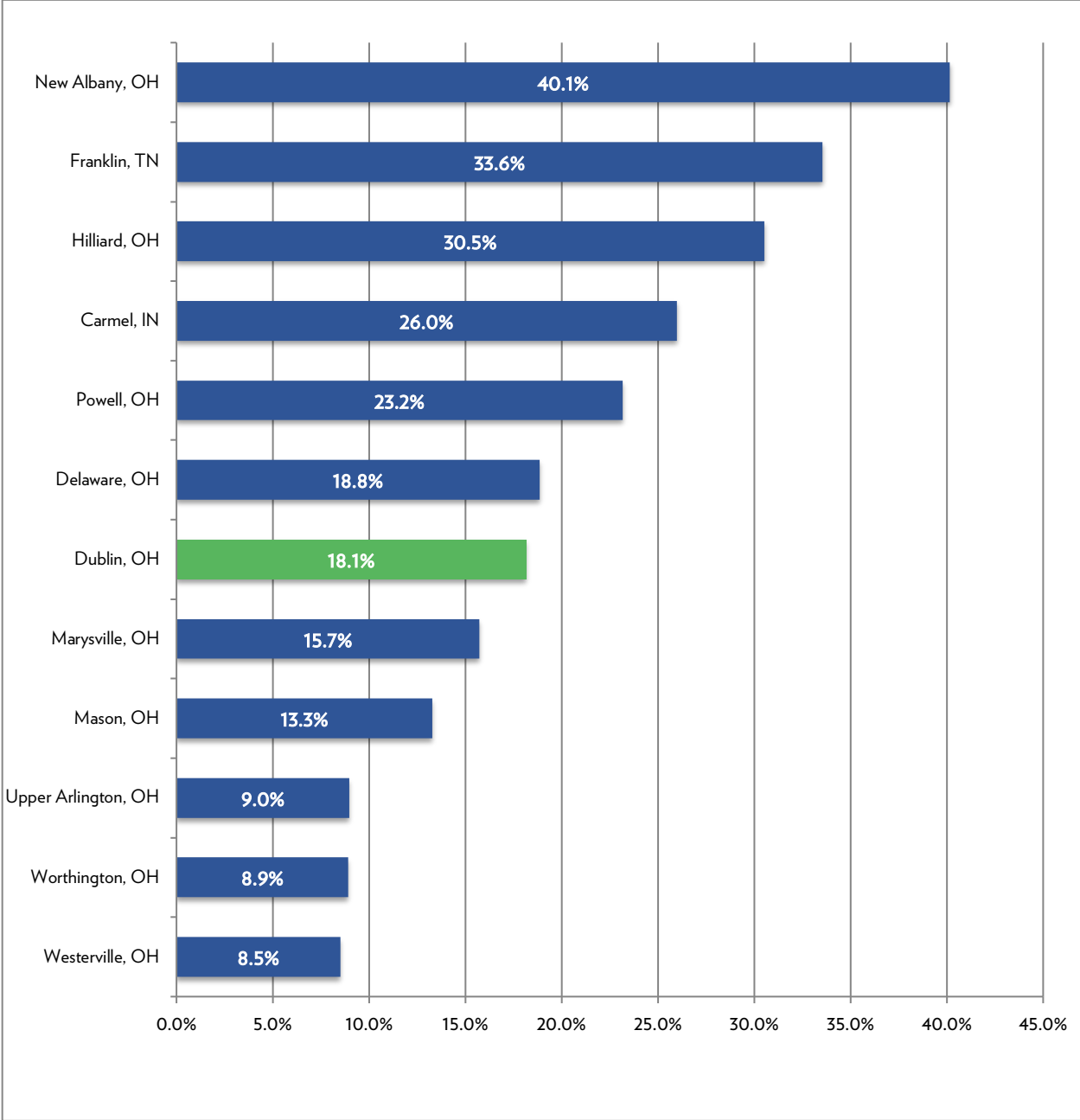
Figure 38: Total Population, 2020



Sources: U.S. Census Bureau; Urban Partners

From 2010 to 2020, the population of Dublin grew by 18.1%, which ranks seventh among the comparison cities. The fastest growing city is New Albany, which grew by 40.1% from 2010 to 2020 (see Figure 39).

Figure 39: Percentage of Population Growth, 2010-2020

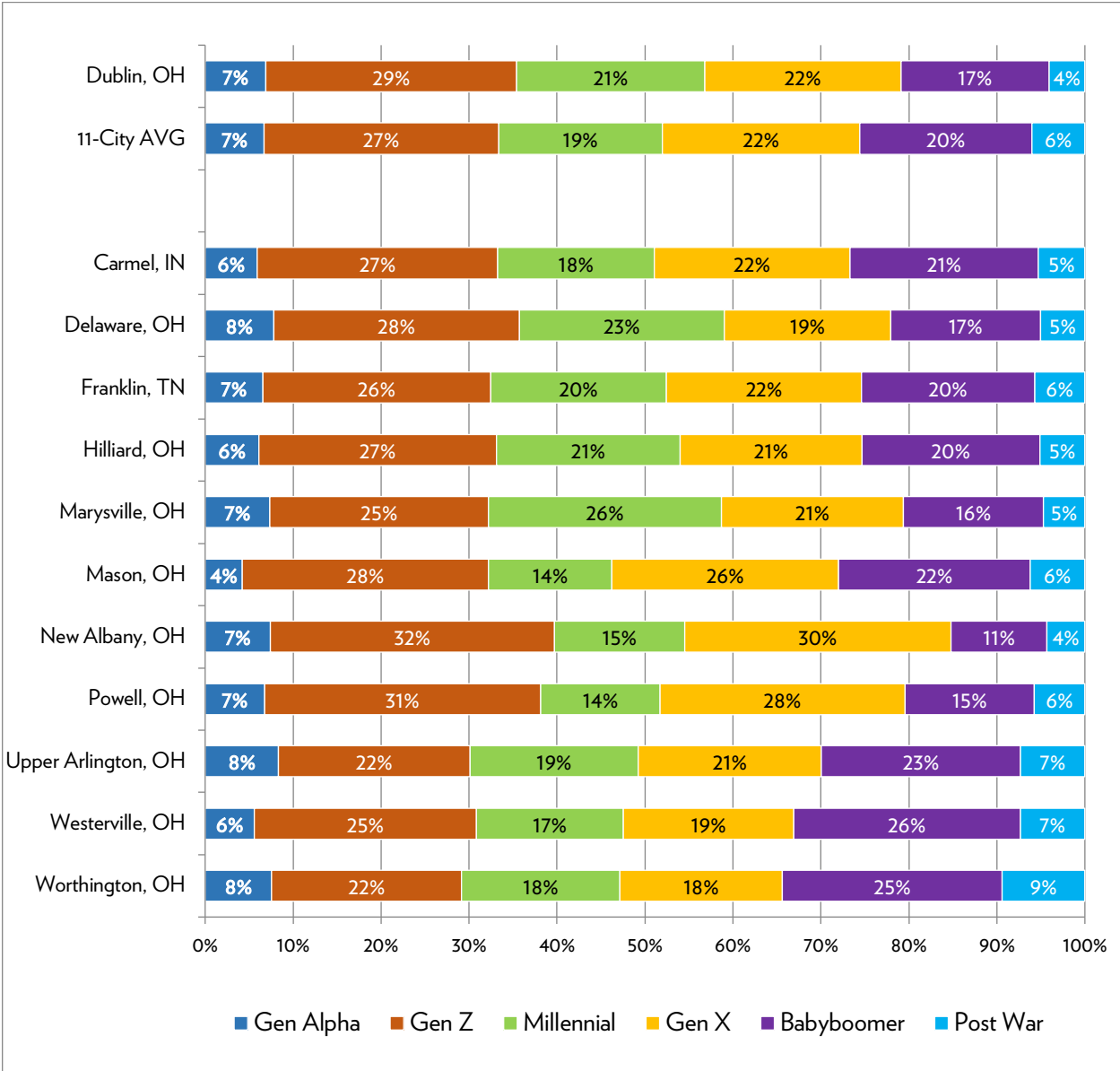


Sources: U.S. Census Bureau; Urban Partners

Figure 40 summarizes the residents of the comparison cities by generational segments. For the purposes of this analysis, Gen Alpha are children under 5 years-of-age, individuals in Gen Z are between the ages of 5 and 24, Millennials are between the ages of 25 to 39, Gen Xers are between the ages of 40 and 54, Baby Boomers are between the ages of 55 and 74, and individuals in the Post War Generation are 75 years-of-age and older.

In comparison to the 11-city average, Dublin is notably younger, as the Gen Z and the Millennial populations are 4% larger. Furthermore, Dublin has fewer Baby Boomers (17% compared to 20% for the 11-city average) and seniors in the Post-War Generation (4% compared to 6%).

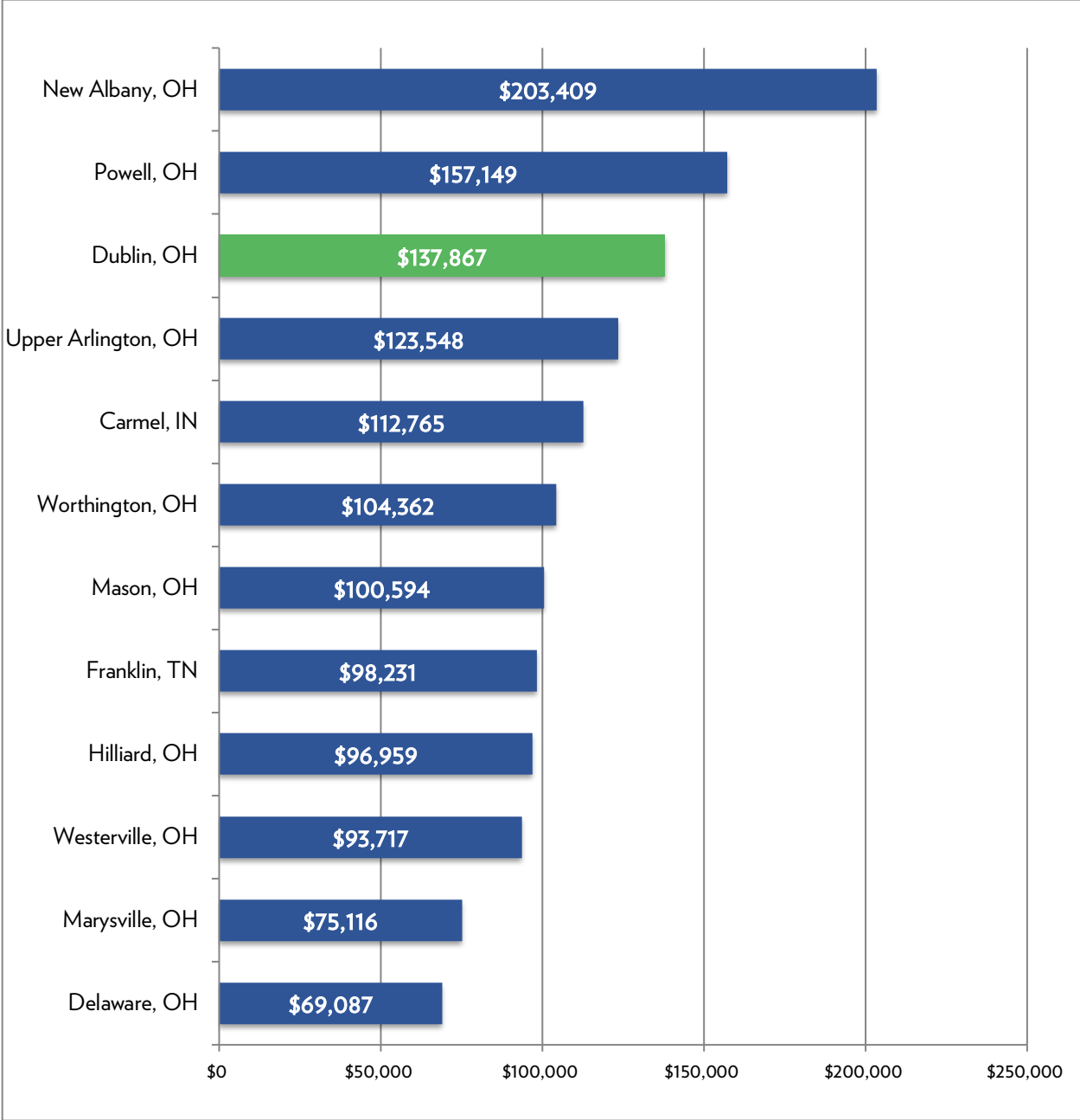
Figure 40: Population by Generational Segment, 2019



Sources: U.S. Census Bureau; Urban Partners

Figure 41 illustrates the median household income for the comparison cities. Dublin ranks third on the list with \$137,867, trailing only New Albany (\$203,409) and Powell (\$157,149).

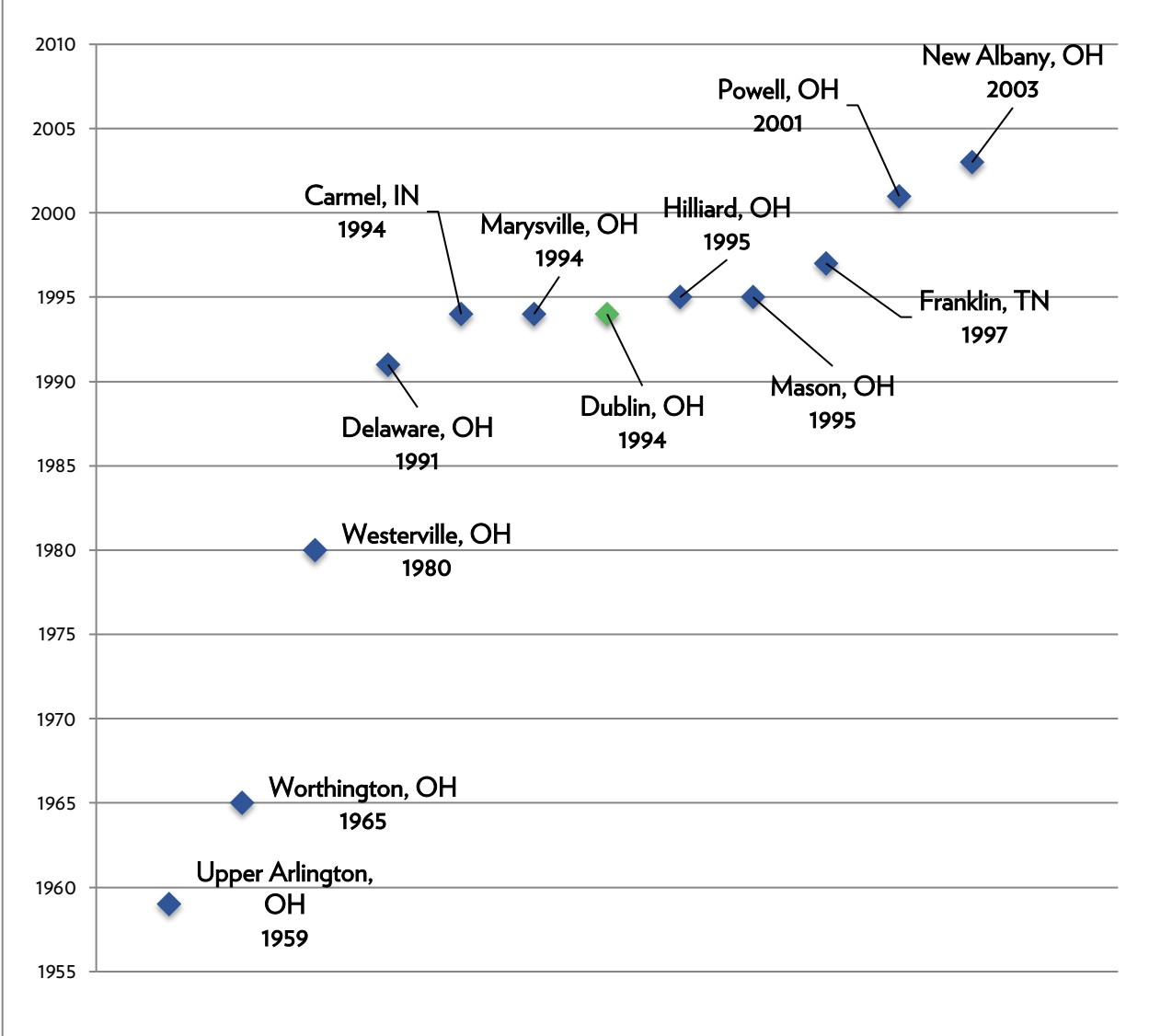
Figure 41: Median Household Income, 2019



Sources: U.S. Census Bureau; Urban Partners

The age of the housing stock in Dublin ranks in the middle of the pack among the comparison cities, with a median year built of 1994 (see Figure 42). The oldest housing stock can be found in Upper Arlington (median year built of 1959) while the newest homes are found in New Albany (median year built of 2003).

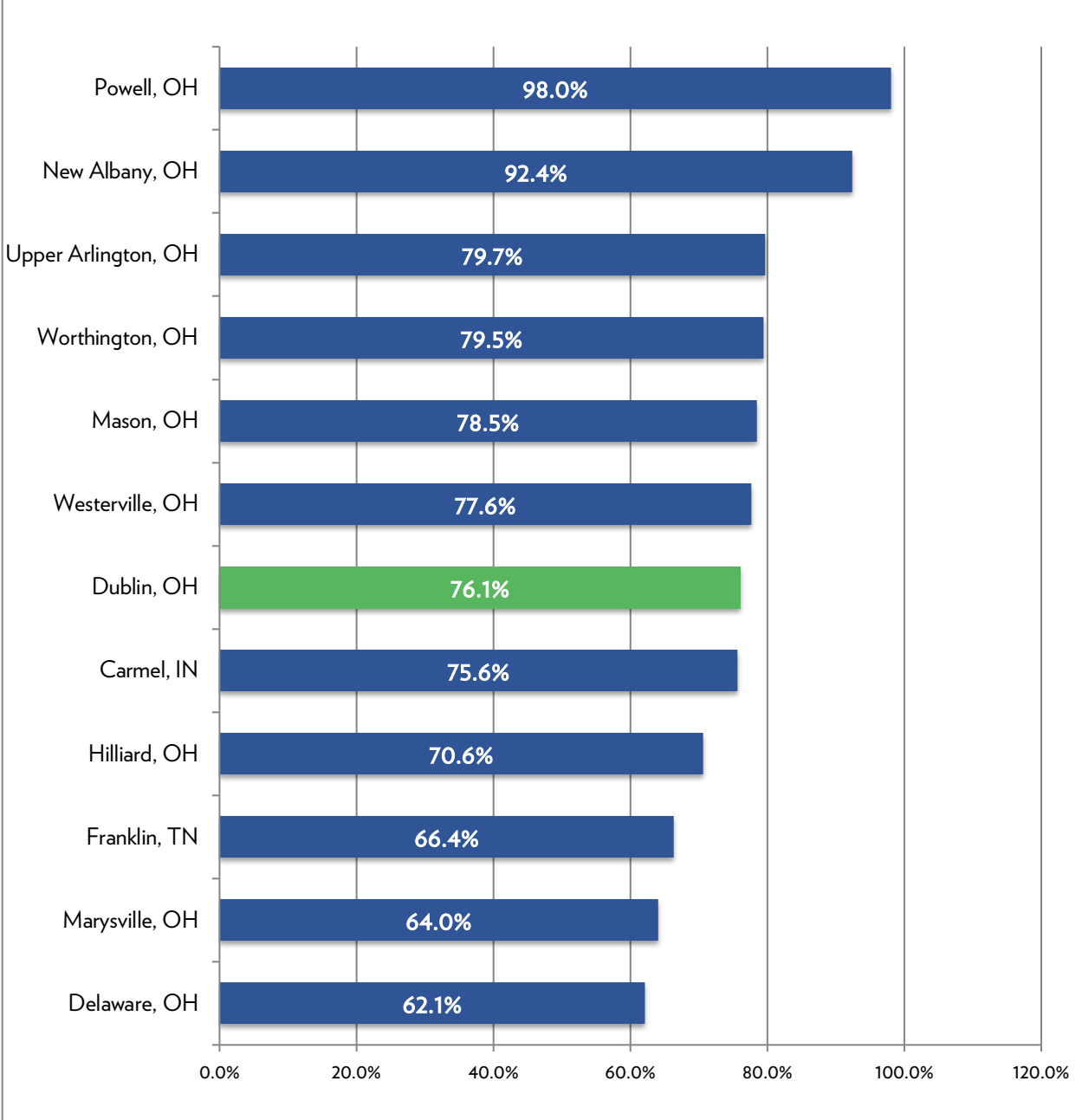
Figure 42: Median Year Home Built



Sources: U.S. Census Bureau; Urban Partners

Dublin's 76.1% homeownership rate ranks seventh among the peer communities. Powell and New Albany are almost exclusively owner-occupied, reporting homeownership rates of 98.0% and 92.4%, respectively (see Figure 43).

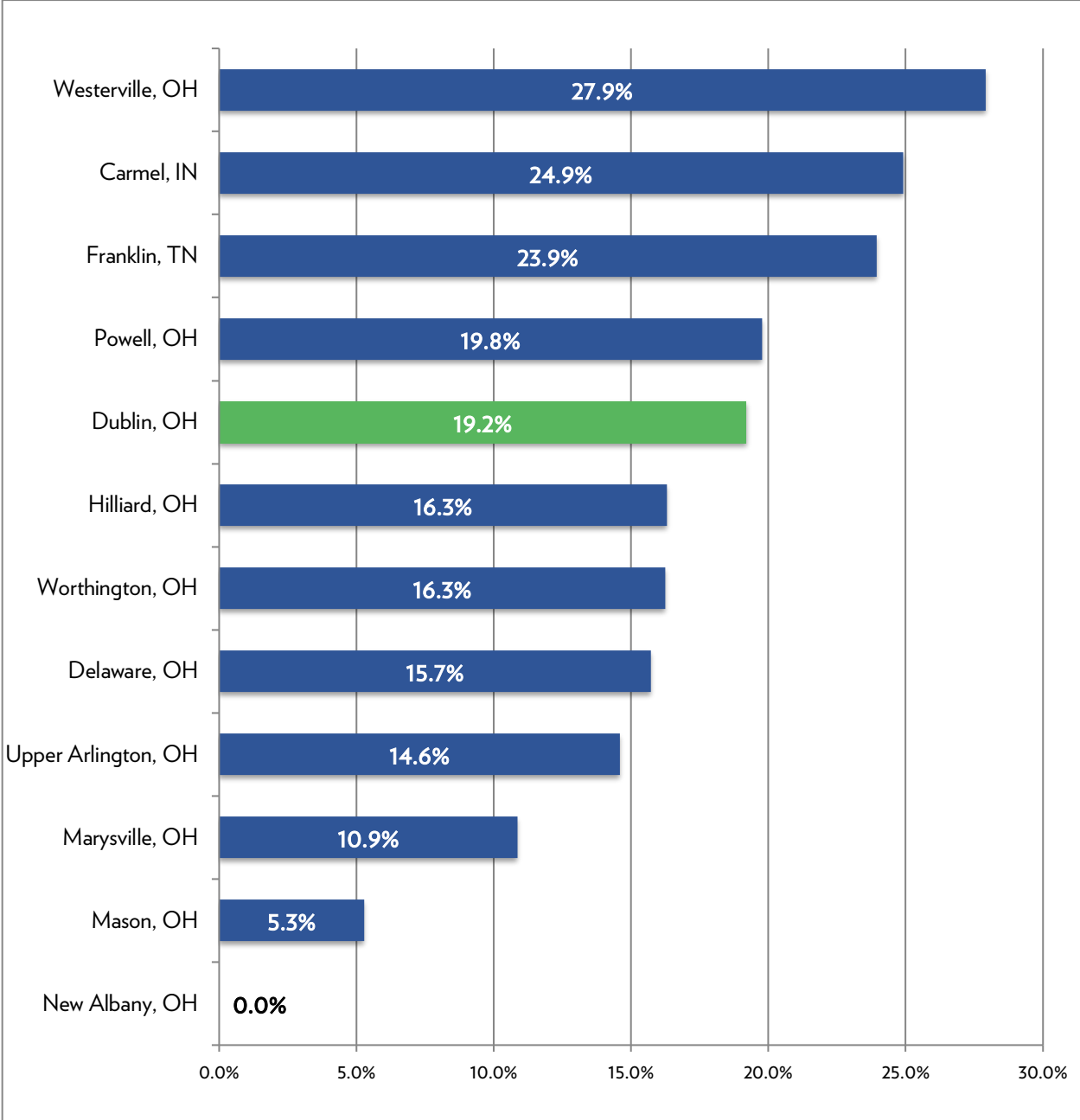
Figure 43: Rate of Homeownership, 2019



Sources: U.S. Census Bureau; Urban Partners

Figure 44 illustrates the percentage of larger multi-family rentals with 20+ units as a percentage of all rental homes. With 19.2% of its rental housing stock in larger structures, Dublin ranks fifth among the peer communities, trailing Westerville (27.9%), Carmel, IN (24.9%), Franklin, TN (23.9%), and Powell (19.8%).

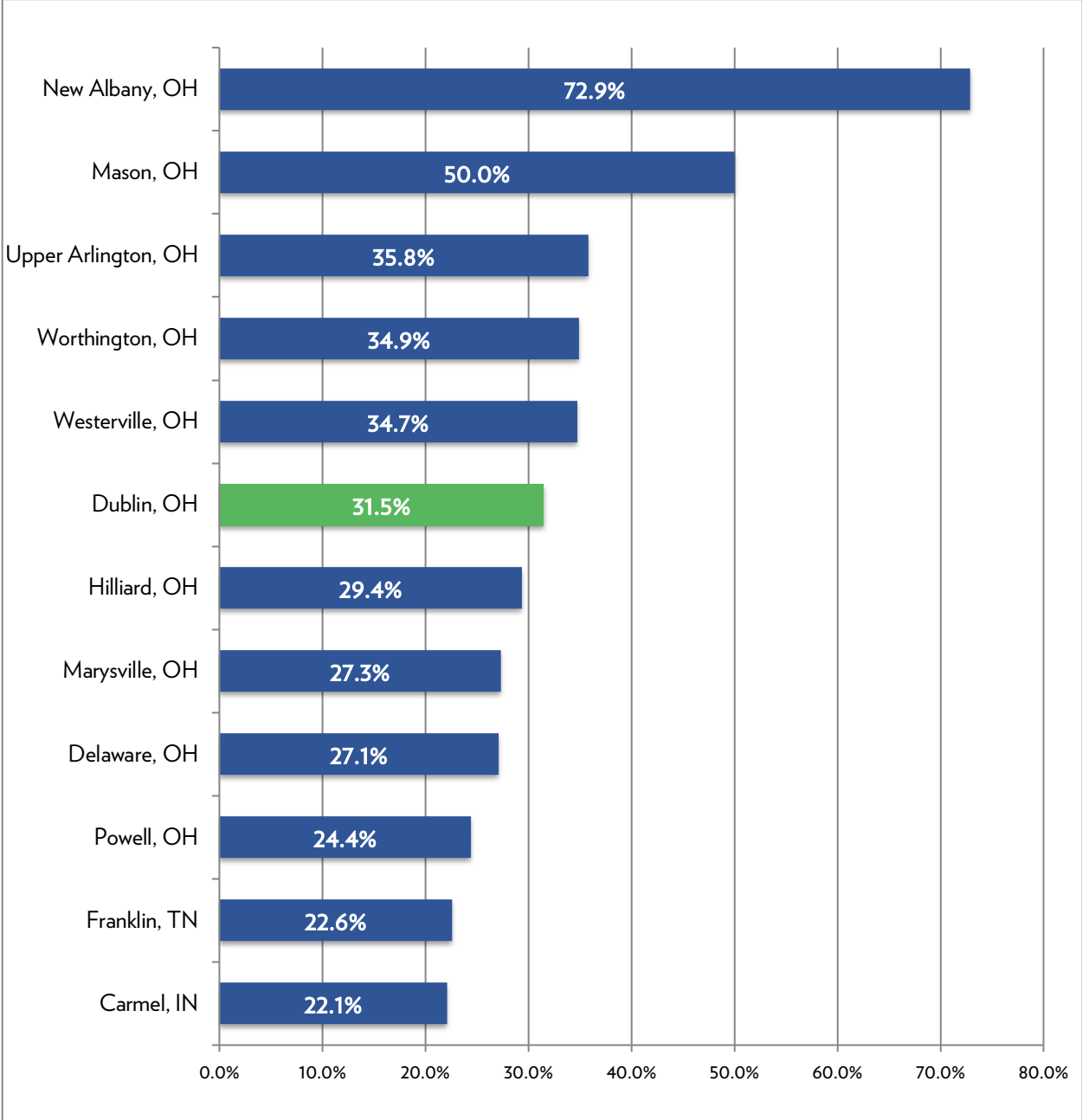
Figure 44: Percentage of Rental Units in Larger Multi-Family Structures (20+ units), 2019



Sources: U.S. Census Bureau; Urban Partners

Figure 45 illustrates the percentage of single-family rentals as a percentage of all rental homes. Dublin is in the middle of the pack with 31.5% of its rentals categorized as single-family homes.

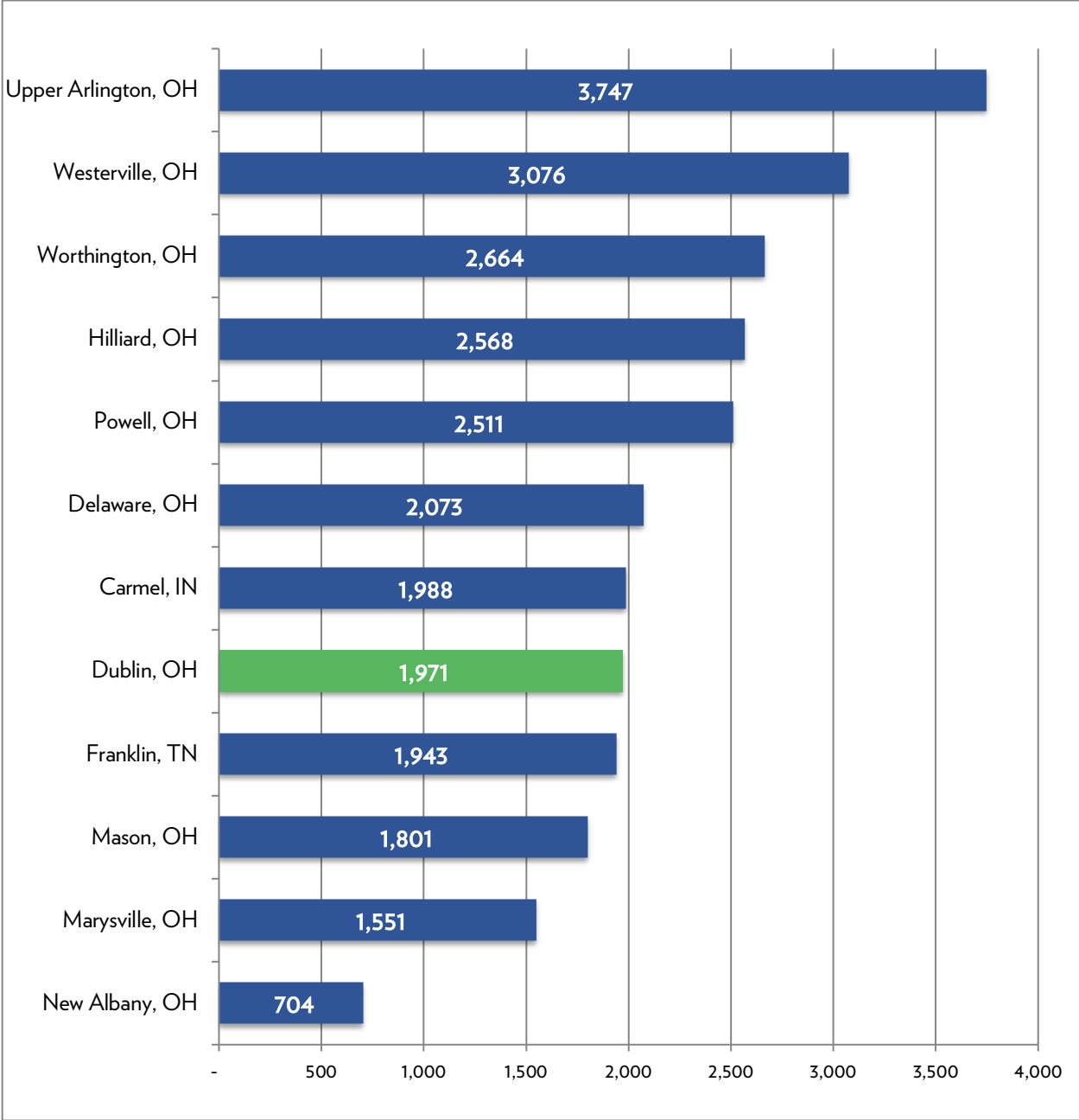
Figure 45: Percentage of Rental Units in Single-Family Structures, 2019



Sources: U.S. Census Bureau; Urban Partners

Figure 46 illustrates the population density for the peer communities, defined as the number of persons residing per square mile. Dublin is again in the middle of the pack with 1,971 persons per square mile. Upper Arlington reports the highest population density with 3,747 persons per square mile, while New Albany is the least dense with 704 residents per square mile.

Figure 46: Population Density (Persons per Sq. Mi), 2020

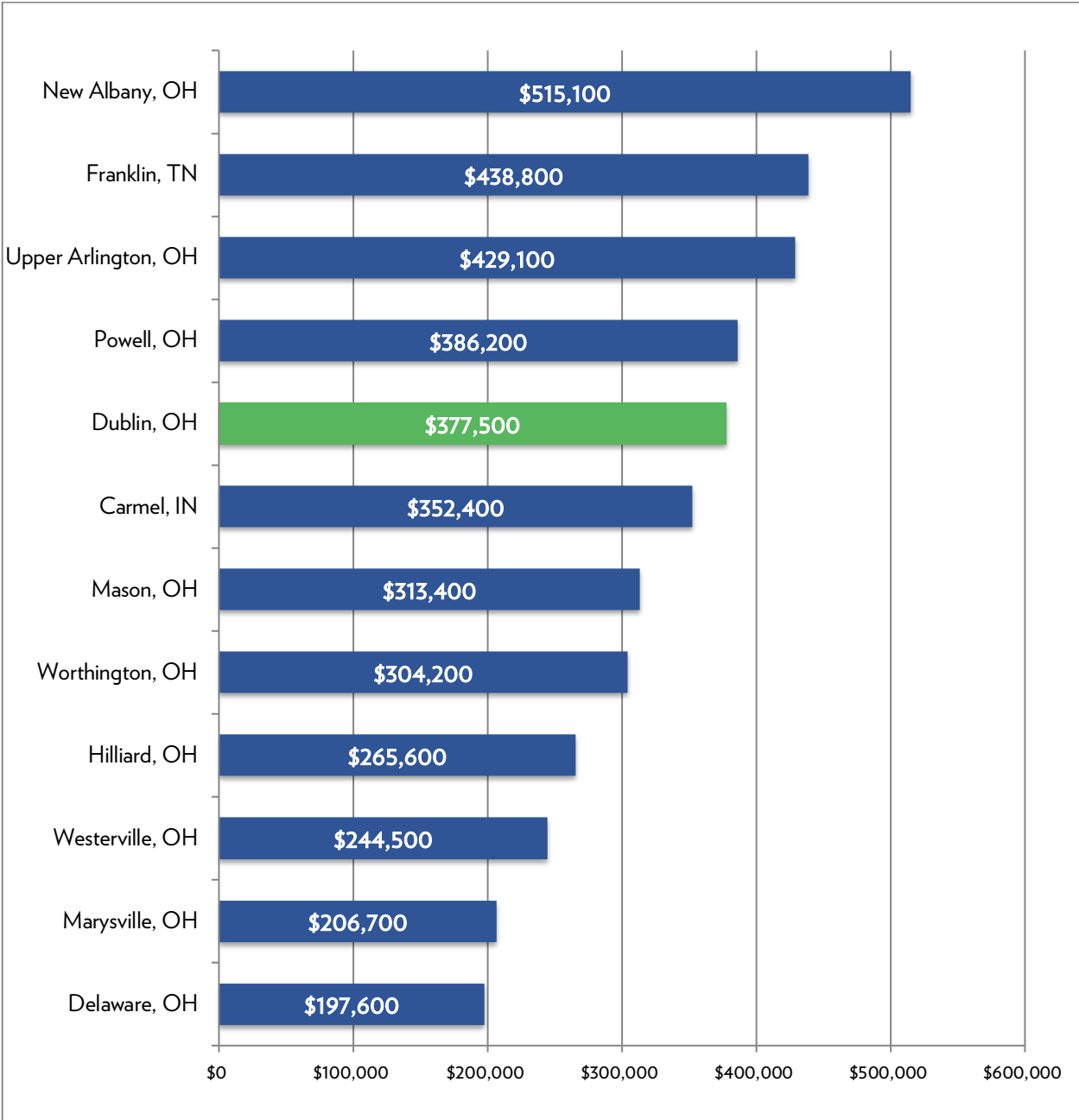


Sources: U.S. Census Bureau; Urban Partners

Housing Value and Affordability

Dublin is a relatively expensive community in terms of the value of owner-occupied homes, with a median value of \$377,500. Four communities report higher median values of owner-occupied homes: New Albany (\$515,100), Franklin, TN (\$438,800), Upper Arlington (\$429,100), and Powell (\$386,200, see Figure 47).

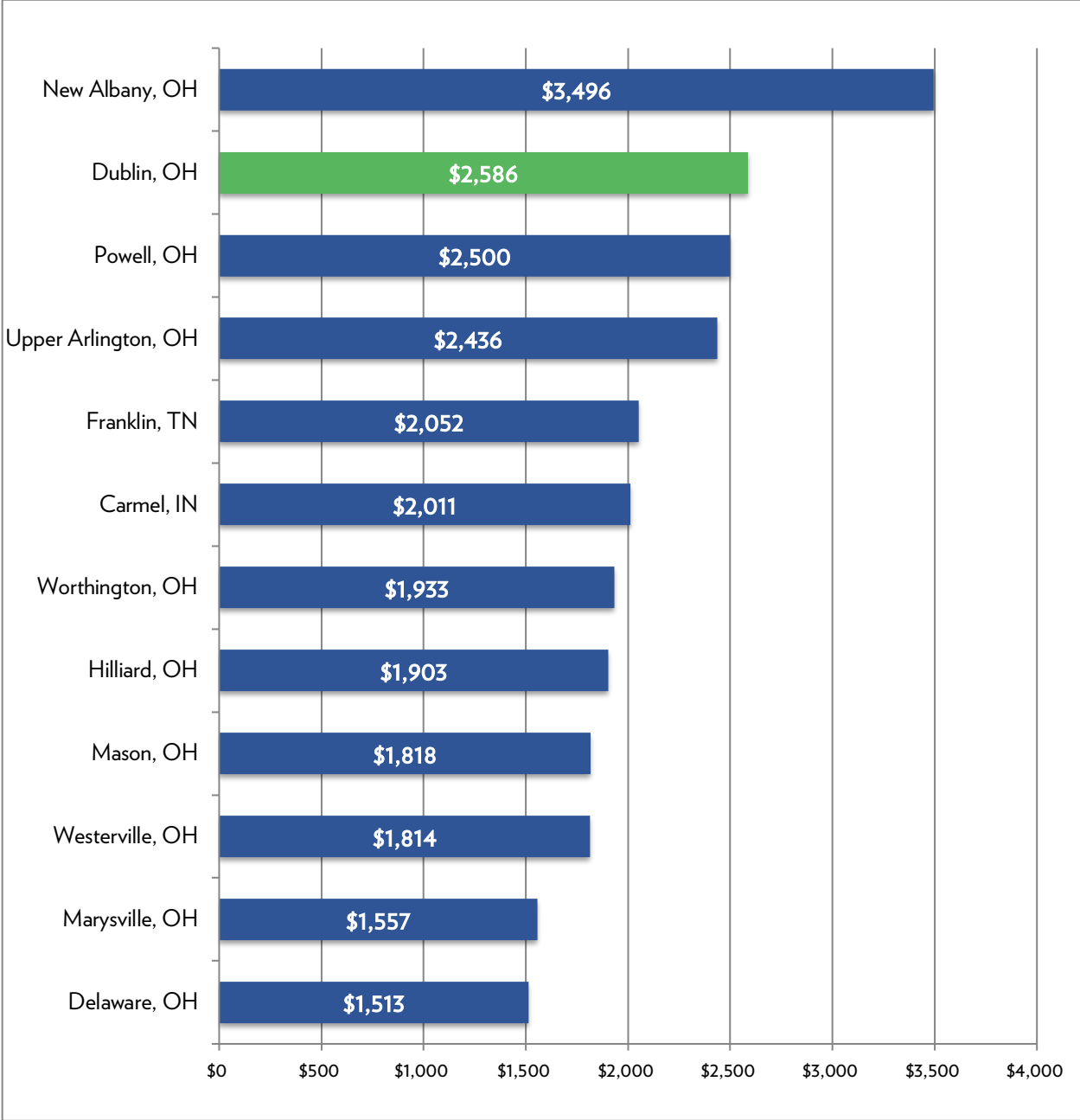
Figure 47: Median Value of Owner-Occupied Home, 2019



Sources: U.S. Census Bureau; Urban Partners

For median owner costs for households with home mortgages, Dublin is one of the most expensive with \$2,586 per month, trailing only New Albany (\$3,496 per month, see Figure 48).

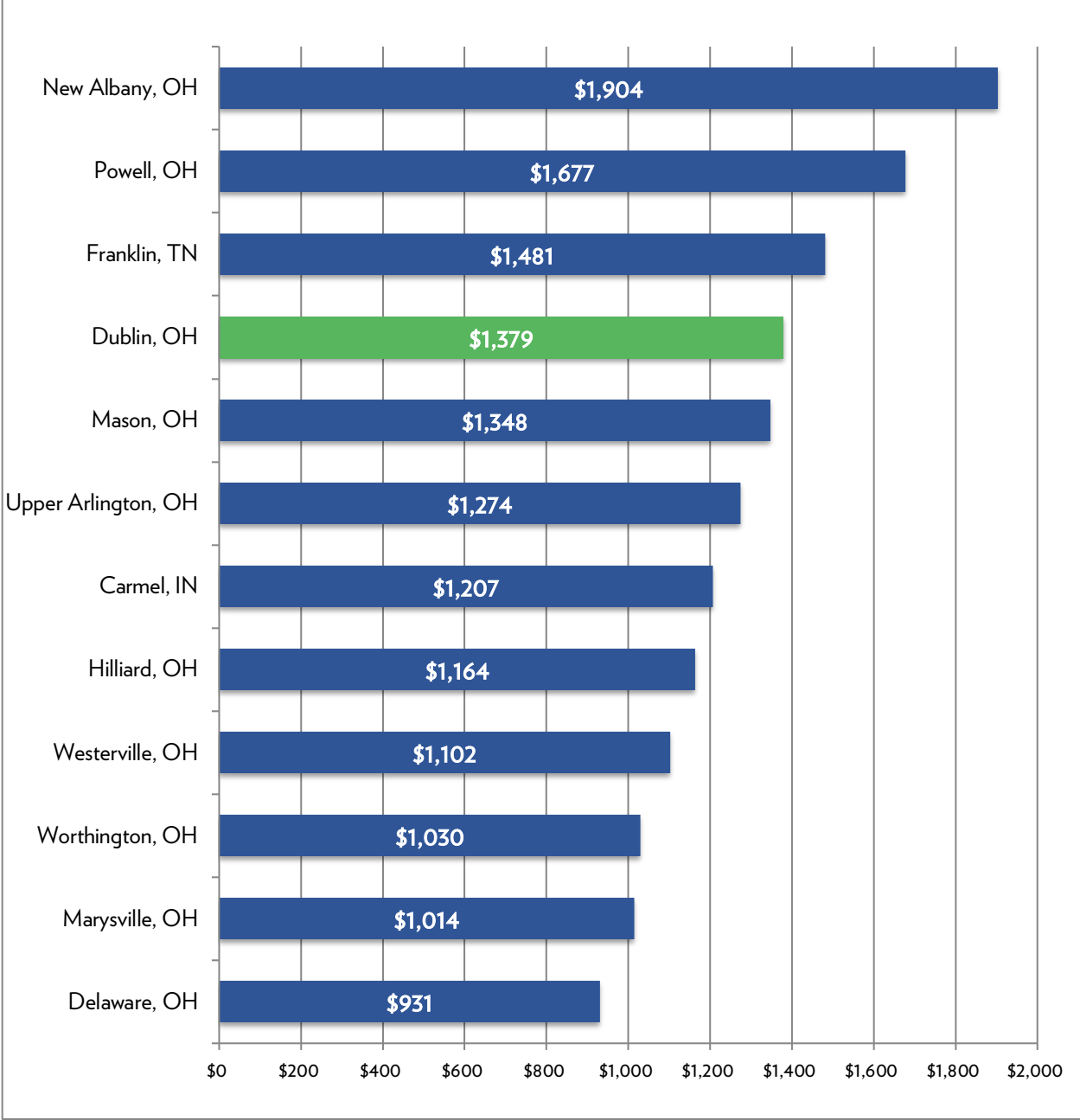
Figure 48: Median Owner Costs – with a Mortgage, 2019



Sources: U.S. Census Bureau; Urban Partners

For median gross rent, Dublin ranks fourth with \$1,379 per month. New Albany has the highest median gross rent of \$1,904 per month, followed by Powell (\$1,677) and Franklin, TN (\$1,481, see Figure 49).

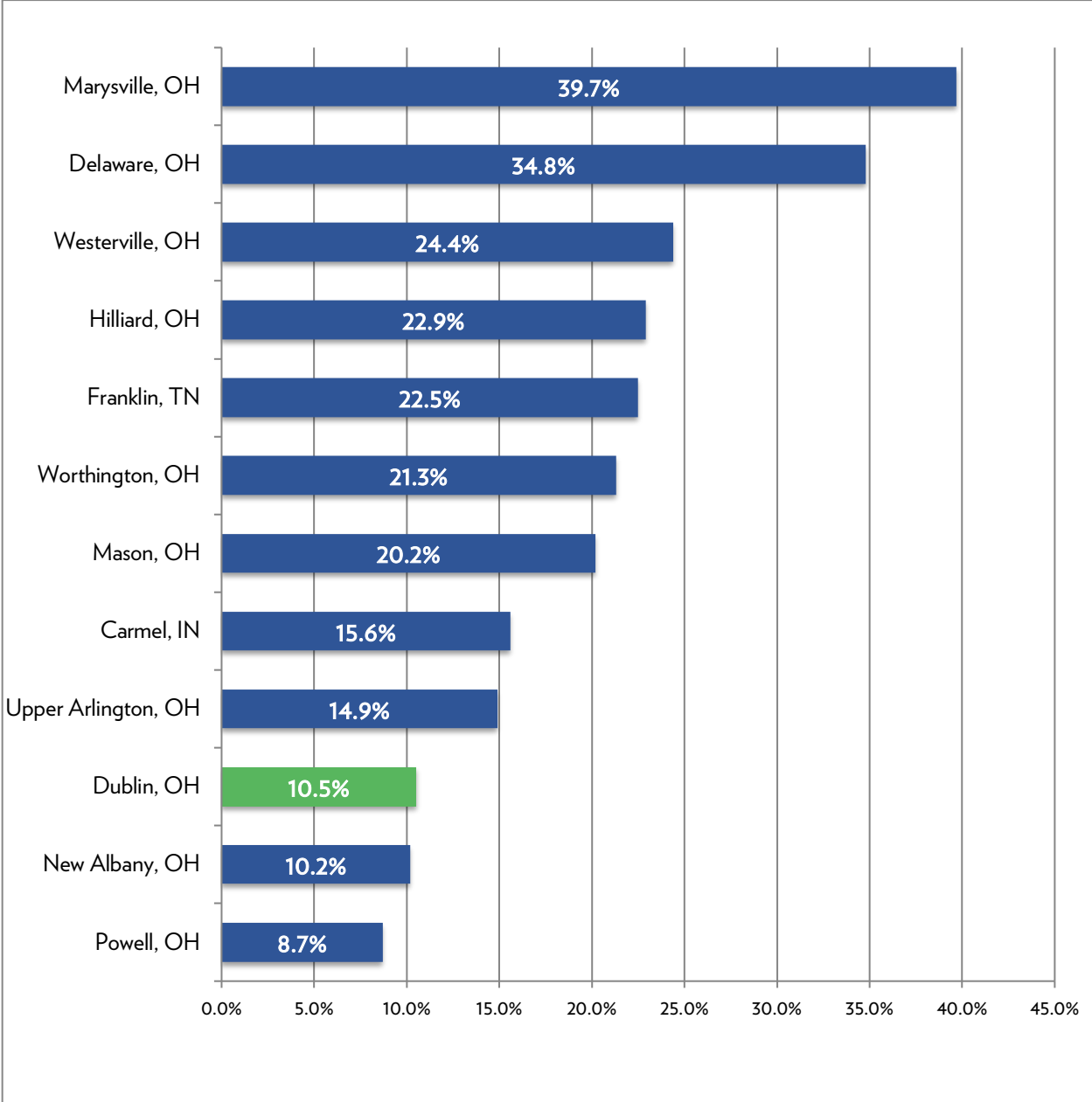
Figure 49: Median Gross Rent, 2019



Sources: U.S. Census Bureau; Urban Partners

Dublin reports one of the lowest percentages of low-income households at 10.5%, trailing only Powell (8.7%) and New Albany (10.2%).⁷ Communities with the highest percentage of low-income households are Marysville (39.7%) and Delaware (34.8, see Figure 50)

Figure 50: Percentage of Low-Income Households, 2018

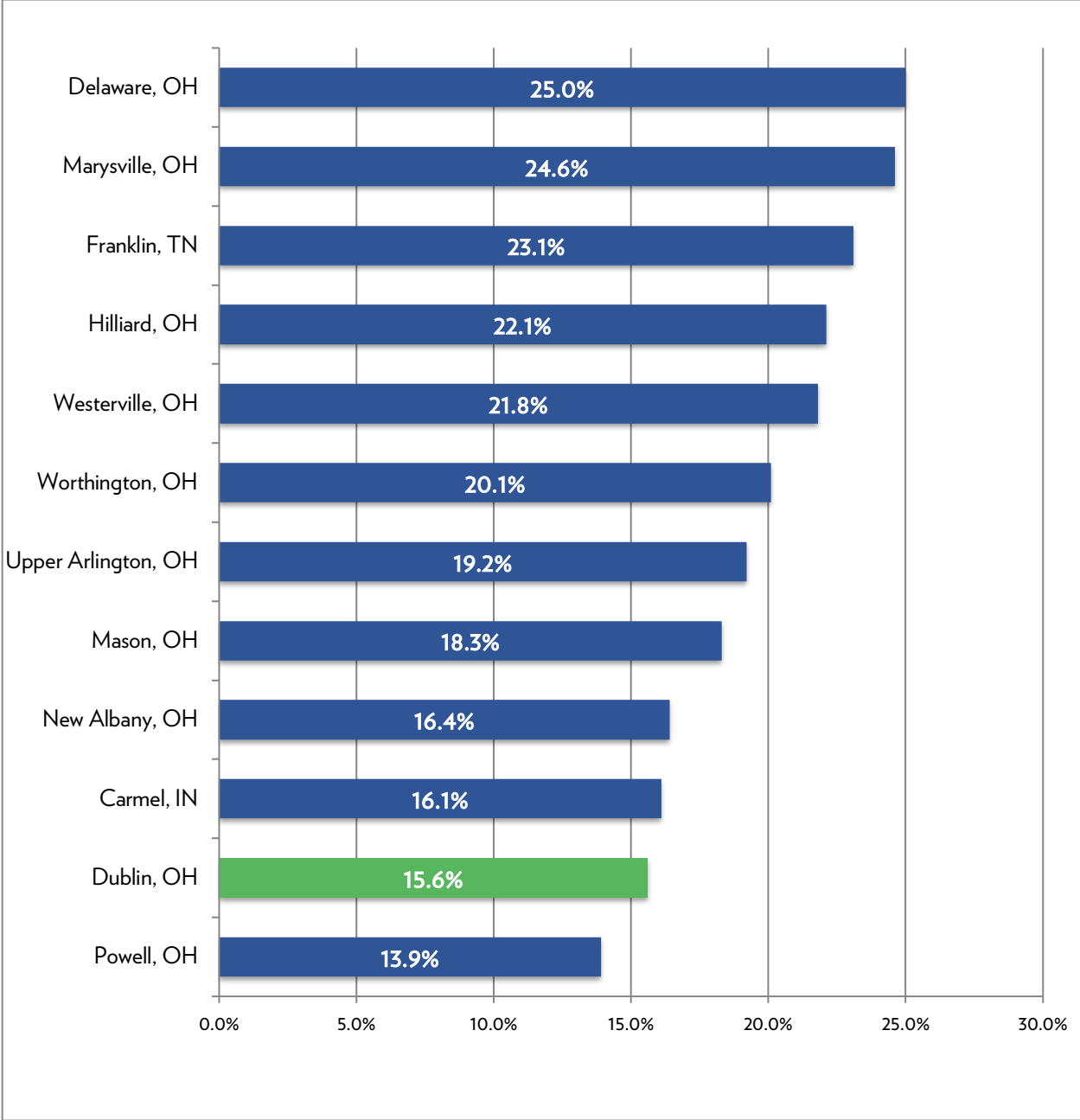


Sources: U.S. Census Bureau; Urban Partners

⁷ The definition of “low-income” refers to households that earn less than 80% of the Area Median Income. For the Columbus Region in 2018, a household of four earning less than \$61,100 is considered below 80% of the Area Median Income and thus “low-income.”

Figure 51 illustrates the percentage of households with housing cost burden—defined as housing expenditures exceeding 30% of the total household income. 15.6% of Dublin households are cost burdened, which is the second lowest among the comparison communities behind Powell at 13.9%. Communities with the highest housing cost burden are Delaware (25.0%) and Marysville (24.6%)—two cities with the highest percentage of low-income households, as indicated in Figure 50.

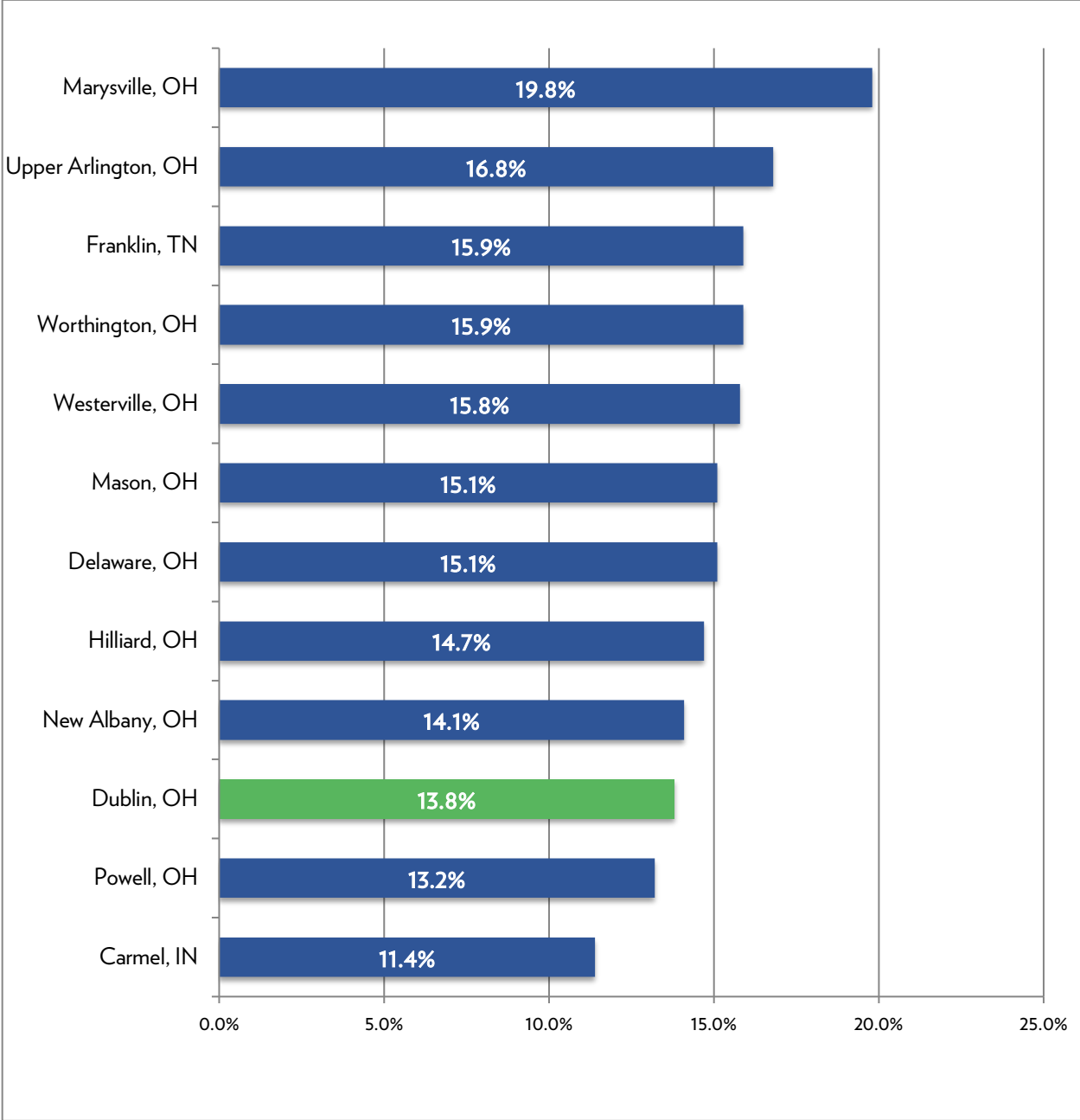
Figure 51: Percentage of Households with Housing Cost Burden, 2018



Sources: U.S. Census Bureau; Urban Partners

Figure 52 shows the housing cost burden for owner-occupied households. Dublin reports the third lowest rate of housing cost burden for homeowners at 13.8%. Carmel, IN, and Powell report the lowest rates at 11.4% and 13.2%, respectively.

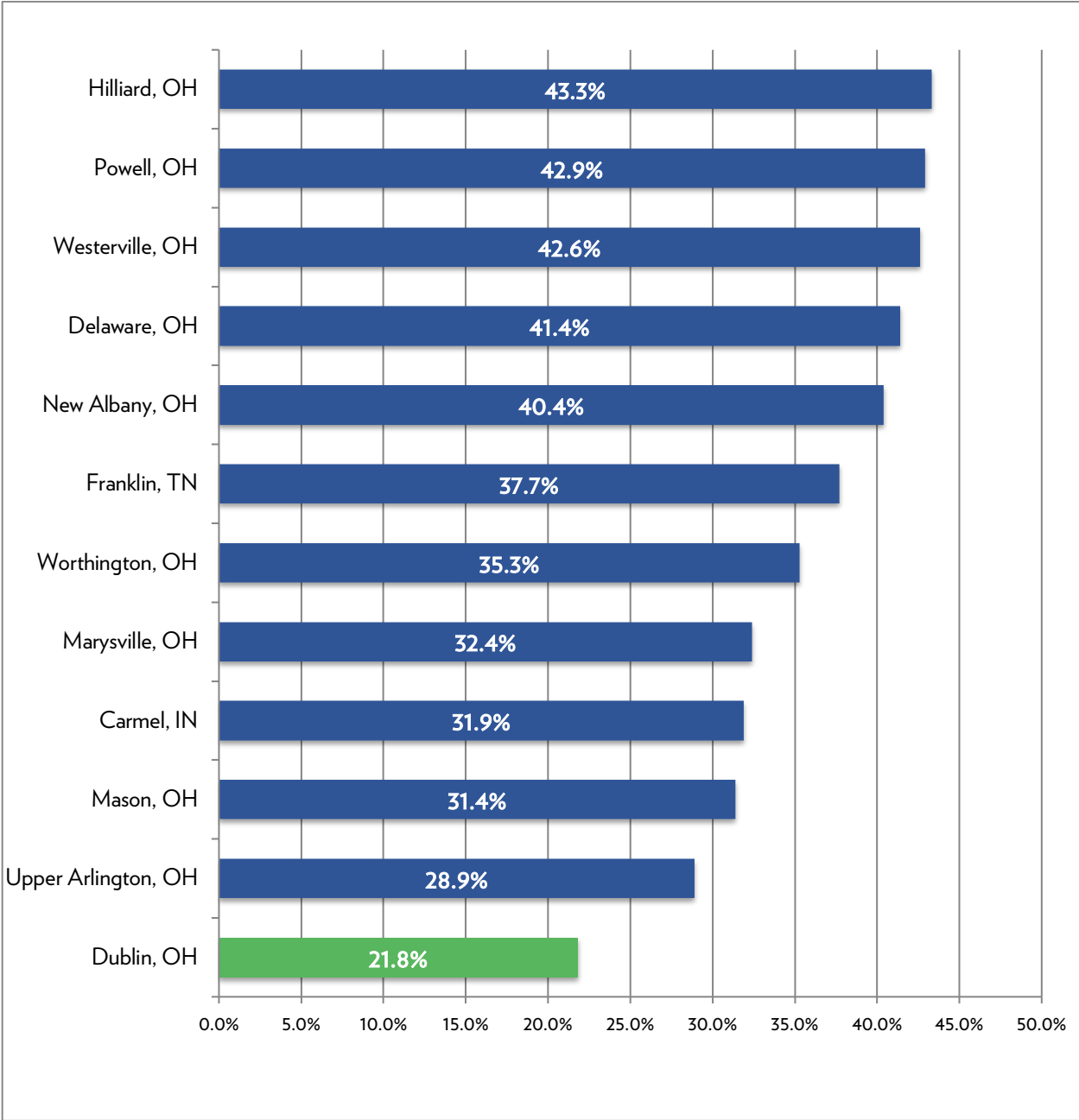
Figure 52: Percentage of Owner Households with Housing Cost Burden, 2018



Sources: U.S. Census Bureau; Urban Partners

Figure 53 shows the housing cost burden for renter households. Dublin has the lowest rate of housing cost burden for renters at 21.8%. Hilliard reports the highest cost burden for renters at 43.3%, followed by Powell at 42.9%.

Figure 53: Percentage of Renter Households with Housing Cost Burden, 2018

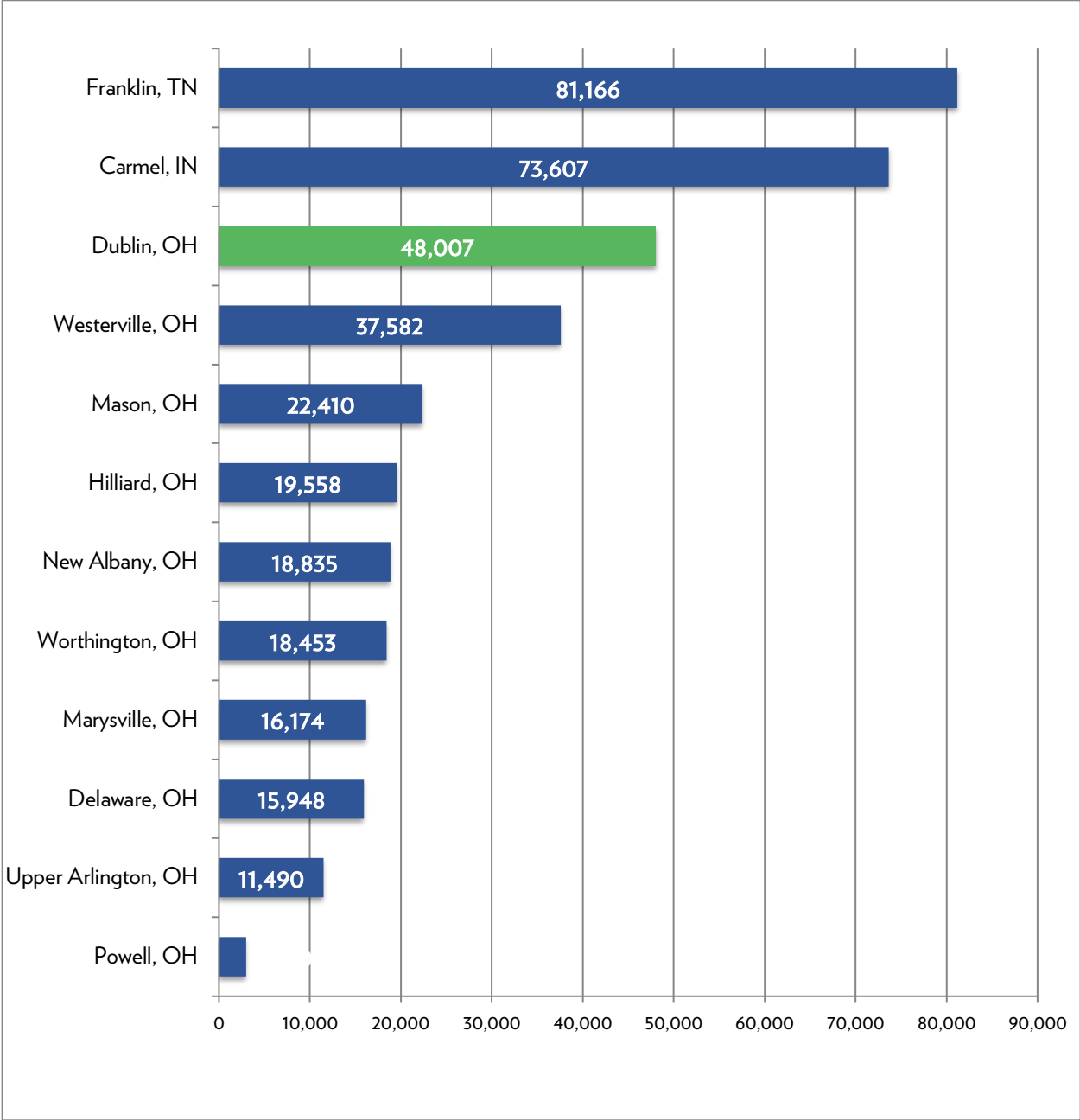


Sources: U.S. Census Bureau; Urban Partners

Jobs and Employment

Figure 54 shows the number of jobs located in each of the comparison cities. With 48,007 jobs reported in 2019, Dublin ranks third among the peer communities, trailing only Franklin, TN (81,166 jobs) and Carmel, IN (73,607).

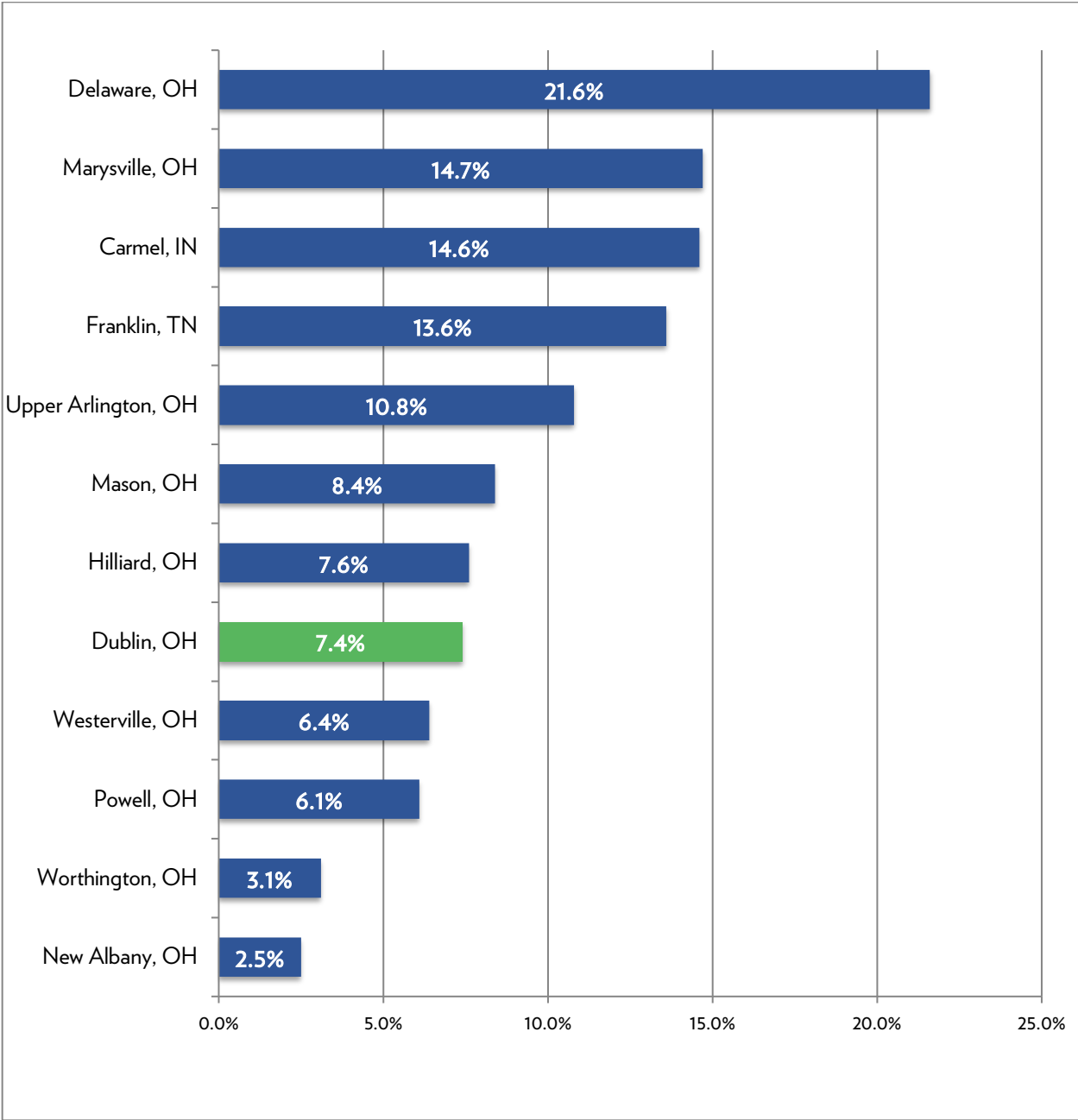
Figure 54: Jobs Located in the City, 2019



Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

Finally, Figure 55 illustrates the percentage of workers who also reside in the same city. In 2019, 7.4% of the workforce in Dublin were residents. Carmel, IN, and Franklin, TN—the two communities with larger workforces than Dublin—reported much higher percentage of workers living and residing in their cities, with 14.6% for Carmel, IN, and 13.6% for Franklin, TN.

Figure 55: Percentage of Total Workforce Who Are Residents, 2019

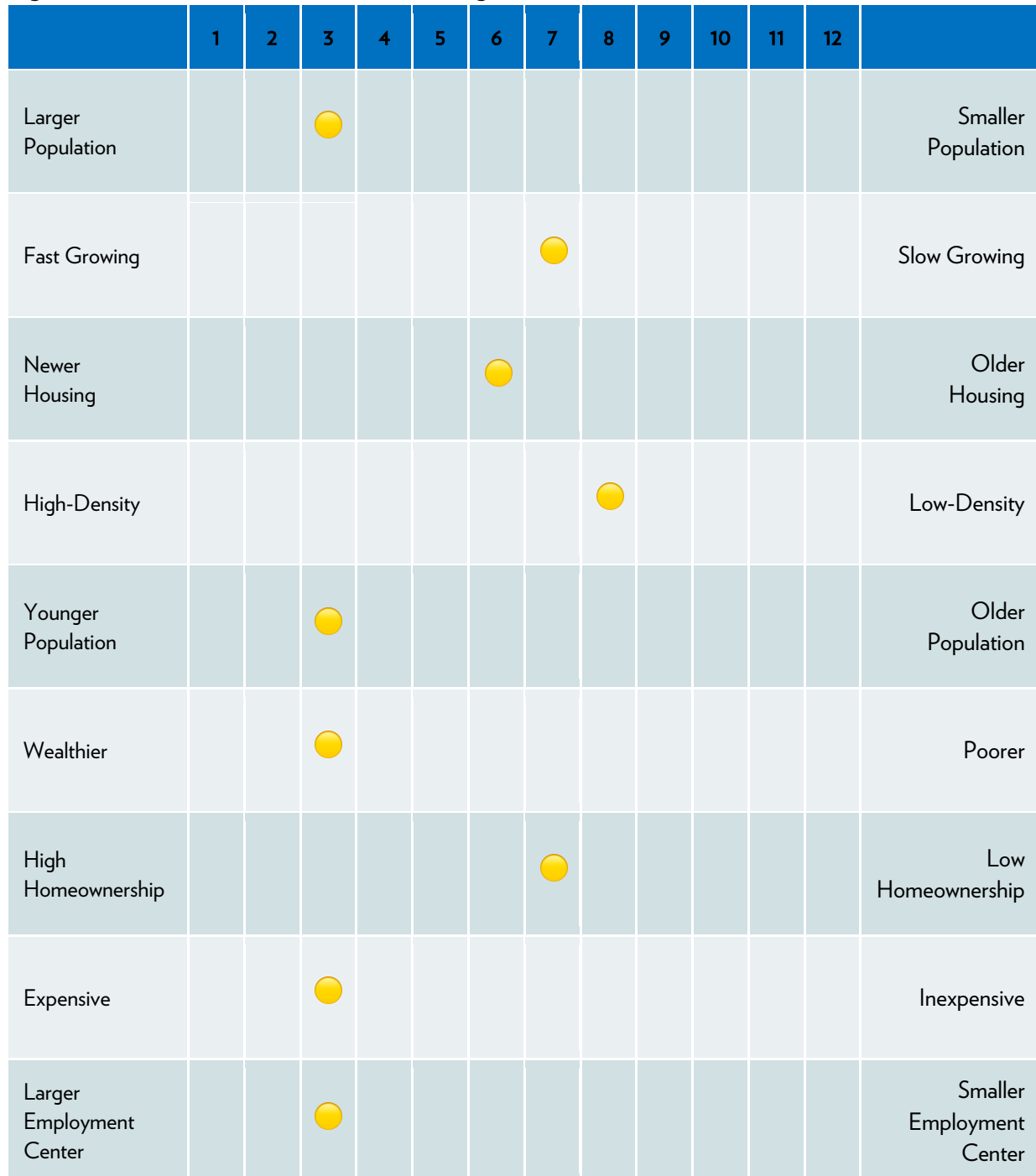


Sources: U.S. Census Bureau; Urban Partners

Summary Comparison

Figure 56 summarizes Dublin's ranking for the various demographic and housing-related indicators analyzed above.

Figure 56: Where Does Dublin Rank Among Peer Cities?



Source: U.S. Census Bureau, U.S. Census Bureau Center for Economic Studies, Urban Partners

9. Population Projections, Future Housing Needs

Population Growth Assumptions & Housing Demand

The Mid-Ohio Regional Planning Commission (MORPC) has developed population forecasts through 2050 for the region. The population forecasts were prepared for small geographic areas that can be aggregated to approximate the current boundaries of the City of Dublin (with some minor adjustments) and of the larger Study Area used for this report. These forecasts project that the population located within the current boundaries of the City of Dublin will grow by more than 11,000 persons to 60,500 by 2040 (see Table 38). Similarly, the population of the larger Study Area is projected to grow by over 31,000 to 167,500 by 2040.

Table 38: Population Growth Forecasts, Dublin & Study Area, 2020-2040

	City of Dublin (Current Boundary)	Study Area
2010 Census Population	41,751	108,579
2020 Census Population	49,328	136,345
2025 Population Forecast	51,700	143,800
2030 Population Forecast	54,300	151,300
2035 Population Forecast	57,300	159,200
2040 Population Forecast	60,500	167,500

Source: U.S. Census Bureau, Mid-Ohio Regional Planning Commission; Urban Partners

The 2020 Census reported that only 737 Dublin residents lived in group quarters, almost all of them (635) in nursing homes and similar facilities. These 737 group quarters residents were two-thirds of all group quarters residents in the Study Area. The MORPC forecasts show the group quarters population remaining constant at about 1,100 for the Study Area through 2040, then growing after 2040.

On the other hand, the MORPC forecasts (consistent with national trends) anticipate persons over the age of 65 increasing from 13% of the regional population in 2020 to 16% in 2040. We believe this second factor (an aging population) will require more group quarters facilities before 2040. Based on this dynamic, we anticipate that a growing share of Dublin area residents will require group quarters facilities, such as assisted living and nursing homes. As shown on Table 39 below, the population in nursing home and assisted living facilities can be expected to grow to 1,400 in the Study Area by 2030 (950 in Dublin) and 1,700 by 2040 (1,150 in Dublin).

Table 39: Estimated Group Quarters Population, 2020-2040

	2020	2025	2030	2035	2040
City of Dublin					
Total Population	49,328	51,700	54,300	57,300	60,500
Group Quarters Population	737	850	950	1,050	1,150
Population in Households	48,591	50,850	53,350	56,250	59,350
Study Area					
Total Population	136,345	143,800	151,300	159,200	167,500
Group Quarters Population	1,100	1,250	1,400	1,550	1,700
Population in Households	135,245	142,550	149,900	157,650	165,800

Source: U.S. Census Bureau, Mid-Ohio Regional Planning Commission; Urban Partners

As shown in Table 40 below, the remaining Dublin population (about 53,350 by 2030 and 59,350 in 2040) will reside in households. Similarly, for the larger Study Area, household population is expected to grow to 149,900 by 2030 and 165,800 by 2040. This represents by 2040 an overall growth of 30,555 in Study Area population residing in households: 10,759 will be at sites currently located inside the Dublin boundaries, and 19,796 will be outside. Depending on sewer service arrangements and other factors, some of this 19,796 population may annex to the City of Dublin.

In its forecasts, MORPC also projects the expected number of households (see Table 40 on the following page). The projected number of Dublin households in 2030 will have grown to nearly 20,000 and by 2040 to 22,320. This reflects a modest decline in average household size. Reported housing vacancy in Dublin in 2020 is a very low at 1.1%. For this analysis, we assume vacancy will increase slowly through 2040 to a still modest 3.4%. With those factors, we estimate that Dublin will need 1,200 additional housing units in the 2020 to 2025 period; 1,040 more between 2025 and 2030; then another 2,610 in the 2030s decade. Total additional housing units required in Dublin in the twenty-year period from 2020 to 2040 will be 4,850.

This, however, will be only a fraction of the total household and housing unit demand in the larger Study Area. MORPC anticipates total households in the Study Area to grow to 67,000 by 2040. However, the MORPC forecasts also assume an aging population, which we believe will cause a decline in average household size for the Study Area from 2.45 persons in 2020 to 2.40 by 2040. Based on that modified assumption of the household size, we estimate total households in the Study Area at 69,100 in 2040. Accommodating this population growth in the overall Study Area will result in 7,203 additional Study Area households by 2030, and 13,853 more households by 2040. Study Area vacancy in 2020 was very high at 5.5%; we assume this will decline to 4.5% by 2040. With those factors, we estimate that Study Area will need more than 3,700 additional housing units in the 2020 to 2025 period; 3,540 more between 2025 and 2030; then another 6,620 in the 2030s decade. Total additional housing units required in the Study Area in the twenty-year period from 2020 to 2040 will be 13,870, including the 4,850 within the current boundaries of Dublin as noted above.

Table 40: Estimated Population in Households, Total Housing Need, 2020-2040

	2020	2025	2030	2035	2040
City of Dublin					
Population in Households	48,591	50,850	53,350	56,250	59,350
Estimated Households	18,064	18,970	19,930	21,040	22,320
Average Household Size	2.69	2.68	2.68	2.67	2.66
Estimate Housing Units	18,261				
Vacancy	1.1%	2.5%	2.8%	3.1%	3.4%
Housing Units Required		19,460	20,500	21,710	23,110
New Units Required: 2020-25		1,200			
New Units Required: 2025-30			1,040		
New Units Required: 2030-35				1,210	
New Units Required: 2035-40					1,400
Total Units Required 2020-40					4,850
Study Area					
Population in Households	135,245	142,550	149,900	157,650	165,800
Estimated Households	55,247	58,900	62,450	65,700	69,100
Average Household Size	2.45	2.42	2.40	2.40	2.40
Estimate Housing Units	58,487				
Vacancy	5.5%	5.3%	5.0%	4.8%	4.5%
Housing Units Required		62,200	65,740	69,010	72,360
New Units Required: 2020-25		3,713			
New Units Required: 2025-30			3,540		
New Units Required: 2030-35				3,270	
New Units Required: 2035-40					3,350
Total Units Required 2020-40					13,870

Source: U.S. Census Bureau, Mid-Ohio Regional Planning Commission; Urban Partners

Population Growth by Age Group

The manner in which the Study Area’s population age composition will evolve in the coming two decades will inform necessary components of the 13,870 unit total housing demand. The MORPC forecasts provide detail on growth in three broad population groups living in households: children under 18; adults 18 to 64, and seniors age 65+ (see Table 41).

Table 41: Dublin Area Population in Households Forecast by Age

	2020	2025	2030	2035	2040
City of Dublin					
Under 18 Years	14,790	15,120	15,880	16,760	17,550
18 to 64 Years	29,670	29,970	30,950	32,580	34,860
65+ Years	5,030	5,760	6,520	6,910	6,940
Study Area					
Under 18 Years	33,980	35,600	37,820	40,240	42,380
18 to 64 Years	87,620	89,930	92,680	96,890	102,770
65+ Years	14,650	17,020	19,400	20,520	20,650

Source: U.S. Census Bureau, Mid-Ohio Regional Planning Commission; Urban Partners

While growth is anticipated in all age groups, the most dramatic changes—following national trends—are in the age 65+ population, with a 41% increase in the Study Area and 38% increase in Dublin. This is in addition to the anticipated increase in seniors residing in group facilities (nursing homes; assisted living facilities).

Components of Housing Demand

To utilize those age-specific forecasts, Urban Partners analyzed the 2019 ACS data for the Study Area to understand the demand for housing by age of householder and tenure. As shown on Table 42, the householder per capita ratio (i.e., the ratio of people who are head of a household to the total population within a specific age group) varies between 18 to 64 age adults and seniors in the City of Dublin from 0.500 householders per capita for those ages 18 to 64, to 0.595 householders per capita for those ages 65 and older.

Similarly, in the overall Study Area the variation between 18 to 64 age adults and seniors ranges from 0.536 householders per capita for those ages 18 to 64, to 0.670 householders per capita for those ages 65 and older.

We must note that the homeownership rate is exceptionally high in Dublin with 75.5% of age 18 to 64 householders and 78.7% of senior householders being homeowners (in comparison, about 64% of households are homeowners nationally). In the larger Study Area, the homeownership rate is 56.9% for householders aged 18 to 64 and 71.5% for seniors.

Table 42: Recent Housing Demand by Age of Householder

	2019 Population	Householder Per Capita	2019 Households	Owner Share	Renter Share
City of Dublin					
<u>Population</u>					
- Persons Ages 18 to 64 Years	27,060	0.500			
- Persons Ages 65+ Years	5,540	0.595			
<u>Household Heads</u>					
- Householder Ages 18 to 64 Years			13,535	75.5%	24.5%
- Householder Ages 65+ Years			3,295	78.7%	21.3%
Study Area					
<u>Population</u>					
- Persons Ages 18 to 64 Years	76,900	0.536			
- Persons Ages 65+ Years	14,030	0.670			
<u>Household Heads</u>					
- Householder Ages 18 to 64 Years			41,244	56.9%	43.1%
- Householder Ages 65+ Years			9,395	71.5%	28.5%

Source: U.S. Census Bureau, Mid-Ohio Regional Planning Commission; Urban Partners

On Table 43, we apply these factors to the household population growth data on Table 42 to identify the likely composition of households in Dublin and the Study Area from 2020 through 2040 by age of householder and tenure. Within the current boundaries of the City of Dublin, total growth in households is estimated at 4,260 for the twenty-year period, while in the overall Study Area, growth in households by 2040 is estimated at 13,700. In both geographies, 31% of that growth is anticipated to occur in households headed by a person 65 years of age or older.

Table 43: Housing Demand by Tenure & Age of Householder (2020-2040)

	2020	2025	2030	2035	2040	Change 2020-40
City of Dublin						
<u>All Households</u>						
- Householder Ages 18 to 64 Years	15,030	15,430	15,940	16,800	18,040	3,010
- Householder Ages 65+ Years	3,030	3,540	3,990	4,240	4,280	1,250
<u>Owner-Occupied Housing</u>						
- Householder Ages 18 to 64 Years	11,350	11,650	12,030	12,680	13,620	2,270
- Householder Ages 65+ Years	2,380	2,790	3,140	3,340	3,370	990
<u>Rental Housing</u>						
- Householder Ages 18 to 64 Years	3,680	3,780	3,910	4,120	4,420	740
- Householder Ages 65+ Years	650	750	850	900	910	260
Study Area						
<u>All Households</u>						
- Householder Ages 18 to 64 Years	45,710	48,230	49,710	51,970	55,120	9,410
- Householder Ages 65+ Years	9,540	11,400	12,990	13,740	13,830	4,290
<u>Owner-Occupied Housing</u>						
- Householder Ages 18 to 64 Years	26,010	27,440	28,290	29,570	31,360	5,350
- Householder Ages 65+ Years	6,820	8,150	9,290	9,820	9,890	3,070
<u>Rental Housing</u>						
- Householder Ages 18 to 64 Years	19,700	20,790	21,420	22,400	23,760	4,060
- Householder Ages 65+ Years	2,720	3,250	3,700	3,920	3,940	1,220

Source: U.S. Census Bureau, Mid-Ohio Regional Planning Commission; Urban Partners

Over the 20-year period, we anticipate a net growth of 8,410 additional homeowners and 5,280 new renter households in the Study Area, of which 3,260 homeowners and 1,000 renters will be within the current boundaries of the City of Dublin.

Finally, on Table 44 shown on the following page, we disaggregate this information by age of householder and tenure to identify how the increments of household demand will likely appear in the Dublin area in each five-year period and how this will impact housing construction requirements through 2040.

Translating housing demand to housing construction requirements necessitates consideration of several factors:

1. Quality senior owner-occupied housing must meet several needs of those households including providing first floor owner’s suites, floor plans that can adapt to potential physical constraints on the owners’ mobility, low maintenance requirements, and outdoor and community amenities. Increasingly, these needs are being most effectively met by age-restricted and age-targeted developments.
2. As a result, quality previously-owned housing is being made available by these senior homeowners to younger households, reducing the need for new construction product to be directed at these younger households.
3. In each five-year increment over the forecast period, a segment of younger households headed by persons ages 60 to 64 will “graduate” to senior status. Many of those households (probably most) will remain in their current residences which will therefore, by definition, meet some of this growth in demand for senior housing.

Considering all these factors, on Table 44, we note **the demand for construction of 14,350 new housing units. Of those, 4,850 units is the projected number of units that Dublin can consider to address growth demands.** These are land use considerations that each community will need to consider in their future land use patterns for their community. This demand is strongest in the 2020s, with 4,590 new units projected by 2025 and another 3,220 units in the 2025 to 2030 period. Another 6,540 units are projected during the 2030s.

Demand for new housing construction over this 20-year period is diverse with needs for 2,360 new senior-oriented homeownership units, 6,390 other homeownership units, and 5,600 rental units—1,290 of them oriented to, or meeting, the needs of senior households.

Table 44: Demand for Newly Constructed Housing (2020-2040)

	2020-2025	2025-2030	2030-2035	2035-2040	Total
City of Dublin					
<u>Owner-Occupied Housing</u>					
- Aggregate Increment of Demand	710	730	850	970	3,260
- Increment of Demand for Senior Housing Construction	410	350	200	30	990
- Net Impact of 60-64 Year-Old Homeowners Aging in Place	180	80			260
- Increment of Demand for Other Homeownership Construction	300	380	650	940	2,270
New Supply Required for Senior Homeownership	300	290	220	30	840
New Supply Required for Other Homeownership	630	490	710	1,020	2,850
<u>Rental Housing</u>					
- Aggregate Increment of Demand	200	230	260	310	1,000
- Increment of Demand for Senior Rental Construction	100	100	50	10	260
- Increment of Demand for Other Rental Construction	100	130	210	300	740
New Supply Required for Senior Rentals	135	110	50	10	305
New Supply Required for Other Rentals	135	150	230	340	855
Net New Supply Required in City of Dublin	1,200	1,040	1,210	1,400	4,850
Study Area					
<u>Owner-Occupied Housing</u>					
- Aggregate Increment of Demand	2,760	1,990	1,810	1,860	8,420
- Increment of Demand for Senior Housing Construction	1,330	1,140	530	70	3,070
- Net Impact of 60-64 Year-Old Homeowners Aging in Place	552	248			800
- Increment of Demand for Other Homeownership Construction	1,430	850	1,280	1,790	5,350
New Supply Required for Senior Homeownership	810	930	550	70	2,360
New Supply Required for Other Homeownership	2,060	1,140	1,330	1,860	6,390
<u>Rental Housing</u>					
- Aggregate Increment of Demand	1,620	1,080	1,200	1,380	5,280
- Increment of Demand for Senior Rental Construction	530	450	220	20	1,220
- Increment of Demand for Other Rental Construction	1,090	630	980	1,359	4,060
New Supply Required for Senior Rentals	560	480	230	20	1,290
New Supply Required for Other Rentals	1,160	670	1,040	1,440	4,310
Net New Supply Required in Study Area	4,590	3,220	3,150	3,390	14,350

Source: U.S. Census Bureau, Mid-Ohio Regional Planning Commission; Urban Partners

10. Housing Strategies

The following details the four action strategy themes that emerged from the quantitative analysis, as well as input and guidance from Dublin City staff, members of the Dublin City Council, and key stakeholders. For each theme, key takeaways are summarized along with a toolbox of potential action strategies that can be utilized as a guide for further community conversations, particularly as Dublin embarks on a process to complete a Community Plan.

Theme 1: Enhancing the sense of community.

A sense of place is essential based on the comments of the stakeholder interviews conducted as part of the Dublin Area Housing Study. This highlights efforts for mixed-use, walkable communities that provide public space for social gathering and open space that enhance quality of life. These efforts are based on consistent, high-quality development that is indicative of the City of Dublin and creates “nodes” of activity throughout the community. The following key takeaways and toolbox for potential strategies have been compiled to promote these objectives.

Key Takeaways:

- Dublin is a community of choice for families searching for high-quality housing in Central Ohio.
 - Strict residential design standards have helped maintain the City’s aesthetic character, but they also contribute to higher home prices.
 - From 2019 to 2020, Dublin added over 3,000 residents aged 25 to 34 and over 65, equating to a growth of 44%. These population segments are forecasted to grow the fastest and have strong preferences for walkable, mixed-use neighborhoods.
- 1.2 multi-modal trails and complete streets.
 - 1.3 Encourage context-sensitive, mixed-use development (commercial and residential) that includes varied housing typologies.
 - 1.4 Ensure that the City’s standards encourage features that promote interaction while maintaining high-quality design standards.
 - 1.5 Focus future growth in intentional nodes of activity throughout the City.
 - 1.6 Encourage sustainable building and energy conservation practices for all types of development, including residential.

Toolbox of Potential Strategies:

- 1.1 Promote walkability throughout the City. Make stronger pedestrian connections from housing to shops, recreation amenities, public facilities, and healthcare providers through



Theme 2: Ensuring economic competitiveness.

The City of Dublin is a community that significantly promotes a balance of land use strongly focused on employment opportunities in the region. Continuing to promote these work force opportunities is essential to the fiscal health of the community. To continue to support these efforts, it is recommended that the City support transportation modes/projects/improvements that aid workers in commuting to the City of Dublin. The following key takeaways and toolbox of potential strategies have been compiled to promote these objectives.

Key Takeaways:

- There is not enough housing in Dublin for young people starting their careers and families with modest incomes.
- Dublin has maintained its status as a key employment node in the region, employing 50,000 workers within the City limits.
- Though generally known as a hub for corporate and professional services jobs, Dublin has a sizable number of service-sector jobs with more than 10,000 employed in the following three sectors: Administrative & Support, Waste Management & Remediation; Accommodation & Food Service; and Retail Trade.
- At today's mortgage interest rates, a 4-person, middle income family can afford a maximum of \$299,000 for a new home, while the median sale price for a home located in Dublin in 2021 was \$500,000. Moderate-income housing options, specifically for families, are in short supply in the Dublin area, which impacts business recruitment and retention efforts.
- There is a need for housing in Dublin for young professionals starting their careers and families with modest incomes.

Toolbox of Potential Strategies:

- 2.1 Regularly participate in discussions with employers, City staff, and housing professionals to understand housing needs to support major employers.
- 2.2 Work with developers to encourage building a variety of housing types close to transportation and employment centers.
- 2.3 Preserve existing income-restricted rental housing stock within the Dublin Area.
- 2.4 Continue working with transit partners and employers to provide first- and last-mile connections for commuters.
- 2.5 Provide resources to the public about programs/incentives to support first-time homebuyers with down payment contributions, low-interest loans, and other financial assistance.
- 2.6 Promote the Dublin Connector and other potential first- and last-mile solutions for workforce mobility needs.
- 2.7 Continuously monitor and evaluate the mobility needs of the business and workforce community.



Theme 3: Planning for future growth.

Similar to national trends, the City of Dublin is projected to grow by approximately 11,000 persons by 2040. Thoughtful consideration of how the City will address this growth while maintaining the sense of place that Dublin has created will be needed. Ensuring a healthy balance of land uses including the City’s long-standing land use policy to target 60 percent residential development and 40 percent non-residential development will be a key component of this consideration. Innovative ways of addressing growth are proposed, including infill development that benefits from existing infrastructure, as well as other zoning regulations that can assist in efforts for gentle density. The following key takeaways and toolbox of potential strategies have been compiled to address these objectives.

Key Takeaways:

- Dublin is forecasted to grow by more than 11,000 persons to 60,500 by 2040.
- Dublin is projected to build 4,850 housing units to keep pace with forecasted growth (185 for-sale homes and 56 rental units annually from 2020-2040).
- Communities walkable to shops, restaurants, and outdoor recreation amenities are highly desirable in Dublin. Bridge Street District is a demonstrated success.
- Despite development impact analyses—and anecdotal evidence from Bridge Street District—showing that apartments minimally impact schools, segments of the community fear that denser growth will compromise school quality.
- Most of Dublin’s developable land areas have been built out, leaving only 1,090 acres of greenfield area available for new residential development.

Toolbox of Potential Strategies:

- 3.1 Educate the public on the benefits of adding “gentle” housing density into residential areas (e.g., duplexes,

triplexes, townhouses, small-scaled condominiums).

- 3.2 Identify opportunities where infill development, or redevelopment of underutilized office/commercial areas, would benefit from new residential development.
- 3.3 Examine and modify current zoning to identify areas where denser residential development is appropriate.
- 3.4 Work with regional partners to understand the availability of incentives or financing assistance for smaller-scale or infill housing products (MORPC).
- 3.5 Collaborate with adjacent municipalities (particularly jurisdictions that overlap with Dublin Schools) to ensure sustainable future growth.
- 3.6 Address *how* growth occurs, not just where it occurs. Ensure that residential land uses are sensitively placed in areas that do not compete with high-tax-value corridors (including interstates), environmentally sensitive areas, or other competing interests.



Theme 4: Expanding housing options for seniors.

Demographic projections indicate that the highest segment of growth will be seniors, 65+ in age. Considering housing needs and programs that support independent living is important for this initiative. There are also educational programs that assist families who support aging family members, including mobility programs and financial assistance needed for necessary modifications to remain independent. The following key takeaways and toolbox of potential strategies have been compiled to address these objectives.

Key Takeaways:

- Consistent with national demographic trends, Dublin is experiencing growth in both the numbers, and the proportion, of seniors.
- Dublin’s senior households will grow by 38% by 2040 (total of 6,940 households 65+).
- There is strong and growing demand for lower-maintenance housing in walkable, amenity-rich neighborhoods with design features suitable for seniors. Bridge Street District is a demonstrated success.
- Housing suitable for seniors to downsize is limited in Dublin. Where they do exist, the new smaller, low-maintenance homes are very expensive.
- Seniors remaining longer in their current homes interrupt the next generation of growing families from relocating to their next level of housing needs.

Toolbox of Potential Strategies:

- 4.1 Increase the supply of new, lower-maintenance housing in walkable, amenity-rich neighborhoods with design features that are suitable for senior living.
- 4.2 Investigate opportunities for accessory dwelling units (ADUs) as a housing option for seniors.
- 4.3 Incorporate recommendations for innovative site design recommended in the Neighborhood Design Guidelines, especially to integrate sensitive design for senior housing projects highlighting walkability, social interaction, and necessary structural accommodations.
- 4.4 Work with Forever Dublin and regional partners to identify senior home modification programs that offer grants, low-interest loans, and/or volunteer labor for a variety of items to help mobility-challenged seniors live safely in their current home.
- 4.5 Work with housing providers to build new homes for seniors with fixed incomes and retain the supply of such units. Prioritize areas serviced by public transit, social services, and medical facilities.
- 4.6 Promote the Senior Circulator service for older adults and individuals with disabilities.
- 4.7 Continuously monitor and evaluate the mobility needs of older adults and individuals with disabilities.



Appendix 1: Summary of Stakeholder Interviews

Between March and April of 2022, Urban Partners staff conducted interviews of key stakeholders from a wide range of backgrounds and organizational affiliations—including home builders and developers, realtors, school district officials, employers, regional partners and neighboring municipalities, social service agencies and advocacy groups, and neighborhood associations. Participants were asked to provide their perspective on Dublin’s current housing stock and their recommendations for future action.

The following is a summary of comments received from the stakeholders.

Home Builders and Developers

- General impressions for Dublin:
 - Very desirable community. A lot of builders want to build in Dublin.
 - The community can come off as exclusionary. It’s challenging at times to work in Dublin.
 - Community push back is not unique to Dublin. We meet with the adjacent neighbors to address potential impacts (traffic, density, etc.). Dublin does not ask for fiscal or school impact studies.
 - Dublin has a “barbell” demographic (young kids and empty nesters). Not a lot in the young professional age group.
 - It’s probably the nicest community in Central Ohio.
 - Not sure how much Dublin wants Single Family anymore. They really want office, as commercial development is bigger bang for the buck.
 - Bridge Park is a differentiator among peers.
 - City staff have been great to work with, but community pushback is a wild card. Dublin community is great at mobilization and lobbying elected officials.
 - Dublin is a strong market. Better positioned than some of the legacy suburbs in terms of product availability.

- Affordability of homes in Dublin
 - Don’t hear about affordable housing as much as Columbus, for obvious reasons.
 - General belief is that Dublin may be perfectly fine for Columbus to absorb all their workforce housing need.
 - Lending institutions and investors – don’t hear about making things affordable. It’s just not their objective. And builders are not housing authorities or social service agencies – but do recognize the need and the market demand for such homes. Yet, Dublin as a community has instituted counter measures that result in higher home prices not lower.
 - The business community may have the most influence to speak to the importance of affordable and workforce housing.

- Maybe the business community has the best chance of convincing the Dublin community about the need for diversified housing stock.
 - Businesses know that the closer your home is to your job, the “stickier” you are to that job.
 - Not sure if there’s a collective desire in Dublin to make the housing stock attainable for all incomes. Hoping that will change in the future.
 - People that work in the City (e.g., teachers, police, nurses, firefighters) need to be able to live in the city but they can’t.
 - Dynamic has a lot to do with zoning and density.
 - Older homes in Dublin a more affordable.
 - The key question that we need to ask is how we can lower the cost of residential development. That doesn’t mean you’re allowing inferior product and developments that look ugly. Let’s use creativity on materials, examine ordinances for their impact on cost.
 - There’s absurdity in trying to build brand new affordable (income-restricted) housing from the ground up. It’s just too expensive and requires too much subsidy. We need to think about the housing supply as a whole and figure out ways to alleviate market pressures.
 - When you want the least cost to make more housing available – make right-sized housing stock available for people, so they can move out of their larger homes which frees up that home to larger families (usually younger and less wealthy) who do need that space.
 - Mandating affordable housing in the style of Columbus (set aside requirement of 10%) is not going to work, numbers wise.
 - Intel development in New Albany will result in high paying jobs...but there will be a lot of demand for blue collar housing as well.
 - Worried about the development expansion to Jerome and Plain City...it’ll create a lot of suburban sprawl. People that cannot afford Dublin (or new developments in Jerome) will look 10-15 minutes farther out and commute to work. That will definitively increase traffic and reduce the overall quality of life.
 - Tax abatements as a tool to incentivize certain types of housing?
 - Young people starting off in their careers – it’s a struggle. But it’s common throughout the metro area.
 - Affordable/attainable – Dublin has to REALLY want it. Right now, you pitch rental or density – they are dirty words.
- Seniors
 - Bridge Park has been very successful at attraction empty nesters.
 - Flats outsell townhomes by a wide margin.
 - It’s a walkable community. Park only 6 cars for every 5 units.
 - Those who winter elsewhere are perfectly fine with a rental apartment.
 - Empty nesters want one-floor living.
 - Seniors who aren’t ready for nursing care, what do they want?

- They want community and a nice place to live.
 - Senior family members live just off Sawmill Road in an age restricted community. They didn't care they were in Columbus, and it made a lot more financial sense.
 - Young professionals and seniors are in the same space. Overlapping of lifestyle choices – walkable diverse communities. Seniors outcompete because of deeper pockets.
 - We are beginning to see elevators in townhomes – marketing to active seniors who are future proofing against potential physical challenges.
 - Flats are attractive for seniors, but multi-family building becomes extremely risky (compared to single family). With the latter, if something happens with the development or with the economy, you can hit the brakes. With flats, you are holding the bag until the very last units are absorbed.
- Ideas for gentle density:
 - It's going to be tough as Dublin doesn't really care about meeting the affordable/workforce housing need. Case in point, when density is introduced, they say no.
 - Right now, 4,000 SF homes are in plenty supply (families with kids love Dublin and want to send their kids to the local schools). What's undersupplied are lower priced housing stock.
 - Would recommend studying the diversity of stock in German Village.
 - Most Dublin folks may feel that 4 story residential structures are too tall.
 - Cottage homes (working definition: small houses on small lots that are single-story that often feature shared amenities and courtyards, with parking garages/lots located away from front facades).
 - Dublin is an ideal place for this type of development.
 - Denser infill construction in older neighborhoods.
 - Micro units (~350 SF rented at ~\$800) to be included developments. For sale micro units may be about 500 SF and sell for less than \$200,000. It's not for everyone, but many people in the service industry find those appealing.
 - Accessory dwelling units may be window dressing, but as part of a range of solutions makes sense.
 - Scaling these is an issue. Who's going to build them?
 - Seen some new home builders sell new homes WITH ADUs already incorporated.
 - In some community, builders are offering ADUs to start off. They are very popular for grandparents, returning college grads – creates affordability and inter-generational living arrangements.
 - Fiscal and property value impact
 - There have been no studies that demonstrated a negative impact of market-rate multifamily apartments to single-family homes nearby.
 - Building studio, 1-bed, 2-bed apartments will have minimal impact on school enrollment. What does impact school enrollment are large 4-

bedroom single family homes. There seems to be a misplaced fear of school impact for multi-family developments.

- The Bridge Park experience for introducing density may not necessarily be duplicated in other areas. Before, it was a driving range and a dead shopping center—Dublin people didn't really regard the east of the river as "Dublin", so it avoided some usual scrutiny.
 - Redevelopment of the 40-acre site at the Indian Run School can yield 300 to 350 units. Adjacency to historic downtown makes it an ideal redevelopment area.
 - The OCLC complex is also a suitable redevelopment area.
 - The Alton Place development scheme, offering a planned village type development is in huge demand. It's a full life cycle offering.
 - The density concept should consider "Main Street" density that transitions to SFR areas behind it.
 - Strategies to make housing more attainable?
 - Bridge Street is doing well in terms of density (more affordable than low density). It's still a challenge.
 - Dublin has an opportunity for attached products for first time homebuyer market.
 - Apartments really don't have impact on schools. Thriveco built 3,000 units in the Columbus area, not too many school aged kids at all.
- Building and design standards:
 - Because it's Dublin, they can demand more things. Other suburban cities have tried to adopt "Dublin-style" design standards.
 - The various standards - tree replacement, wood windows, minimum lots, asphalt driveways, etc. - they all contribute to higher housing costs in Dublin.
 - For every \$1,000 house goes up in cost, 100 buyers are priced out of the market.
 - Open space requirements are onerous. Drives up cost.
 - Understand that the reason why people want to live in Dublin is that it's an attractive place. Zoning wise, the city has done a good job.
 - Streamlining the permitting process is a good start. Time is money, as developers spend so much time in the planning/approval stages, naturally the cost go up and have the sell/rent the homes at higher prices.
 - Development process is stringent and not easy. Other places have become more Dublin-like in what they ask for.
 - It's a huge challenge from the development side. Huge investment required to get approval.
 - Nicely codified code seems to get tossed out when it gets to commission, often ignoring staff comments.

- Miscellaneous
 - Taxing in Ohio – communities don't really have incentive to build houses because of the structure taxing issue. Dublin has maximized that taxing structure to their benefit.
 - Mobility – SHARE service is provided at Bridge Park, but it's not really a selling point. Everyone has a car, and everyone drives (perhaps not as dependent on cars as other neighborhoods).
 - We used to have Lime (not sure what happened to that)...but with Park and Ride and other enhance transit service, perhaps more people will be less reliant on cars in the future.
 - Institutional investors using cheap money to outbid homebuyers is not good for neighborhoods, but not sure how long that will last, given the likely change in interest rates and inflation climate. Not sure what the solution is either.
 - Home supply issues are everywhere. In 2006, we were 6 million homes over built. Now, we are 6 million homes short. As interest rates fell, the pressure on housing went up due to cheap money flowing to residential real estate instead of banks.
 - There's a lot of housing that is getting older. Are there resources available to make improvements for those?
 - As a builder, we're focused on putting as many projects down as possible, anticipating the potential housing market slowdown with higher interest rates. It'll probably take a few years to cool off. We hope to be far enough on the development process to be less affected.
 - There's a development project in Jeffrey Park where the developer will be operating a coffee shop and restaurant themselves – to avoid the difficulty of trying to find businesses that will successfully operate in that environment.
 - OCLC campus – could be redeveloped as a small version of Easton Town Center?

Realtors - Residential

- General impressions for Dublin:
 - Amenities are great. Have to pay a little more in taxes, but we get a lot of services.
 - Housing for is needed for all types of people. All markets: first time, entry, move-up houses, seniors. Every segment is short.
 - Dublin has done a pretty good job managing growth, adding new units in a variety of different forms.
- Affordability of homes in Dublin
 - Even before current supply issues, Dublin was expensive. Now there's absolutely no new construction that average households can afford.

- People are gravitating to the outer edges (Jerome, Concord, Washington Twps) – where taxes are lower.
- It's an upper high-end market – affordability always is an issue.
- First time buyers, entre level homes just aren't in the market in Dublin.
- Bridge Park is primarily for the higher income households.
- There's a lot of buzz for Central Ohio...with Intel, the Amazon Data Center...and people are moving here. People with higher incomes will be okay, but what about people in the service industry or younger people?
- We should explore incentives as opposed to mandates for affordable housing. Latter add cost. Ideas may include expediting the development process and green lighting responsible development.
- Every time a large housing proposal gets discussed, there has always been a review/further review...public input. Current residents (rightly or wrongly) want to preserve their value.
 - Developers just don't have an option to make things affordable. The numbers just don't work. Buy land, curb cuts, sidewalks – it really can't be affordable.
- Seniors
 - Because of the drastic price increases...empty nesters don't downsize into new homes. They are aging in place and “logjam” is occurring because empty nesters have nowhere to go and the next wave of younger households with kids aren't backfilling.
 - Seen some seniors sell their homes at the high mark and moved to a rental unit.
- Denser development pattern
 - For future growth, density has to be part of the conversation.
 - People want walkability. In previous eras, people were fine to be within walking distance to parks/bike and walking paths. Now, people want to be within walking distance to shops, restaurants, farmers markets, etc.
 - Dublin has done a pretty good job including some of that density (i.e., 5 to 7 stories...but you can arguably go higher in some areas).
 - Bridge Park
 - It's a vibrant, safe, cool place to go. Don't have to go to downtown to enjoy similar experiences.
 - A lot of people originally did not want it, but now that it's built, it's phenomenal.
 - Young people want fun and excitement in a safe environment. A lot of them say they'd rather hang out in BP over Short North.
 - We need creative ideas, and not perceive density as a bad word.

- Housing issues related to employment-workforce
 - Workforce segment – it’s an absolute need. We’re talking about workforce affordability. Firefighters, nurses...they are all priced out of the market. Average \$436,000, those folks that earn \$50 to \$90k struggle to pay those home prices.
 - Public transportation is not a strength, it’s an opportunity.
 - Talked a lot about light rail, but to make it feasible, you need density. Without density, you won’t be able to sustain the level of service that’s acceptable.

- Community opposition to denser development proposals – a collaborative education process needs to happen. There has to be talk about the economic development perspective, bringing and keeping good paying job to Central Ohio. Unless housing keeps up with the needs of the business community, business won’t be able to expand and make new investments. If you don’t have the housing, you don’t have jobs.

- Miscellaneous
 - Innovation District - because of the location and access to highways, apartments would be very well received there. It could be a walkable area that’s also easy to commute to and from.
 - Dublin Schools – a MAJOR factor in families choosing to live in Dublin. It has a great program for children with disabilities and moved have moved to Dublin because of that.

Realtors - Commercial

- Economic climate
 - When businesses study where to locate, they care more about where they’re going compared to where their employees (and potential future employees) live. Traditionally, it’s been between the 10 o’clock and 2 o’clock position in the Beltway.
 - Post COVID era – envisions most businesses will bring everyone back to the office, while preserving some level of flexibility. Maybe the new norm will be 4 days in the office, 1 day at home?
 - Office products are aging. New corporate workforce is looking for a mixed-use environment (like Bridge Park). They don’t want to drive into a parking lot, work all day, and get into their cars to drive to their homes (garages).
 - Retail needs to be connected to office and residential.
 - There is a pent-up demand for flex-industrial and Dublin may be in good position to absorb.
 - These are single-story, office/retail up front and warehouse in the back. These used to be class C product, but now we’re getting into class B.

- Economy and where it's headed, Dublin is really concentrated in white color work...but it could be a blind spot or weakness potentially. How can they diversify the economic base? Having people that are all different types of economic positions?
- Metro Center redevelopment
 - After 24 years of developing the site, there's still parcels that aren't built - it should indicate something - that we should look at alternative development strategies.
 - The green space, open space, connections, parks - make it a potentially nice area for residential.
 - Metro Center is a very good location - it's even walkable to downtown and the Bridge Park district. The buildings are bit tired.
 - If people can't afford to live in Bridge Park, this area can offer an alternative.
 - There's a need for office space for all ages and businesses. Not everyone can afford Class A space. So, older office buildings there may fill a market need for more affordable office space
 - A strategy involving infill, mixed use would be good there.
 - If I'm a young person, go through the nicest apartment they will love it. It costs \$3200 a month...but too expensive, where's a unit that's a bit lower? Those units near the highway do get built because the market will determine that.
 - Comments we hear is that Dublin does not allow for MFs along the highways. There's nothing in zoning code that says that. Let the market dictate if it's appropriate or not to locate apartments near highway. The developers are the ones taking the financial risk.
 - Pruning off some of the excess/older office supply and introducing a mixed use there is a positive goal.
- Regional position
 - Don't think Dublin is too different from a housing perspective. Housing costs have gone up a lot. Communities all over Central Ohio has been thriving.
 - The only way to compete is to create housing at every price point. Apartments, senior, entry level...helps the best.
 - Dublin was a real trend setter with the Bridge Park development. Can see other suburban communities trying to duplicate BP in their communities.
 - Dublin has an enviable corporate base.
 - Bridge Parks is the envy of every municipality in Central Ohio, including downtown Columbus.
 - Development expansion west to Plain City, Marysville will be beneficial, as those residential communities will be rooftops for entertainment and retail establishments in Dublin.
 - Housing market is regional and there should be a regional conversation. Dublin alone can't solve market challenges.

- Intel development may be an opportunity for regional players to engage in conversation.
- Housing diversity
 - The comprehensive plan should promote a diversity of housing, not just SFR on large lots. Dublin needs more patio homes, townhomes, etc.
 - Development standards, density to lot sizes...not helping the affordability issues.
 - We need to have enough multi-family choices (maintenance free). You should strive to offer all of those. Need to have choices (shouldn't be too heavy on SFR or multifamily). Aim for the sweet spot, the right mix.
 - At the end of the day, it's greed. Land owners want too much for their property. Materials, construction company...everyone is marking up their prices...all gets into the price.
 - You can't be all things to all people, but when you don't have housing for young people, you lose the vitality and the ability to attract business investment because the talent pool is elsewhere.
 - All that money that these young people would spend locally is lost.
 - Dublin is lacking - housing choice standpoint - MF developments that are market-driven.
 - Pricing: rents in the \$1.80 to \$2.25/SF. So, about \$1500 to \$2000, depending on size.
 - One-bedroom for single occupant, or two-bedrooms for two roommates.
 - Middle-aged families have a hard time cracking into the Dublin market because of pricing.
 - Political will to provide for affordable housing is to be desired in Dublin. Having labor pool is going to strengthen the economy. If you have a diverse labor force, you're much better suited to take advantage of the opportunities.
 - Bridge Park is so successful but there are service sector workers - who do they live?
- Intel investment in the region
 - There's going to be a ripple effect throughout the region. The immediate three- to five-mile radius will be most impacted, but there will be increased levels of demand for ancillary services and spillover business activity.
 - Intel investment and spillover impacts will result in increased housing demand, but not all the suburban areas are not set up to capture
 - New Albany had a competitive advantage because of green fields, but it's not a diversified economy right now. Dublin can compete in ancillary spillover activity.

- Miscellaneous
 - High standards don't affect the commercial side, except for maybe the signage requirements.
 - Maneuvering through the density issue:
 - Comes down to good leadership. We have to talk about future demand
 - seniors, young people, etc.
 - What businesses has to say has huge impact on affecting policy.

School District Officials

- Impact of schools on housing
 - Evident that in Central OH there's a housing shortage
 - A lot of new growth taking place in NW quadrant (Jerome Village)
 - Bridge Park has only garnered 18 kids
 - Communication about development plans is important for school district
 - Dublin is good
 - The opposite is true in Jerome
 - Housing impacts the number of children in school system
 - Faculty/staff need housing
 - Perception is that certain schools are particularly desirable
 - Emerald Campus draws wide attention
 - Lots of homes in region that feed good schools
 - Older homes and are being renovated
 - There will be growth issues as new housing gets constructed - especially in Jerome area
 - New middle school recently open and it's already full
 - There has been redistricting to accommodate that growth
 - Growth is taking off

- Housing attainability for faculty/staff
 - Dublin offers a little of everything
 - Many come from Hillier
 - Nearly 50% of teachers live in Dublin
 - Difficult for colleagues to find homes there - even those with higher incomes
 - Not every staff person can afford to live there
 - Affordability is an issue
 - None of the support staff can afford Dublin
 - Some of the teachers in two-adult working households do live in Dublin

- Housing attainability (general)
 - There are lower rent areas but also very high dollar homes
 - Particularly Union Co. portion
 - Middle portion is missing
 - Growing disparity is a concern

- Not adverse to growth but need to know how this growth will occur
- Dublin was previously much more affordable
- It's much harder to find affordable housing now
- Since tight housing market, it's not easy finding a house
- Families want to be there – sometimes multi families move there and live together to be able to live there
- Not enough rental housing available
- Very expensive
- Finding a place to stay in Dublin that's not very large is difficult
- Traditionally built as a residential suburb
- Bridge Park is great, but units are pricey and small
- Types of future housing needed in Dublin
 - Going from cradle to grave, people leave homes into smaller places
 - Their homes get replaced by families with children
 - There are a lot of assisted living and nursing homes
 - Good options for seniors
 - Historic district
 - Seems like there is a lot of different spaces for different needs
 - Older homes could be good starter homes but they're still expensive
 - Would be nice to have more smaller starter homes
 - The large McMansions are a bit over supplied
 - Dublin is going to grow older
 - Lots of longtime residents who want to stay but may not be able to
 - Downsizes
 - Dublin has been traditionally “exclusive” and that may not change
 - Need to head toward smaller living
- Concerns about housing regarding school enrollment
 - New elementary and middle school at capacity
 - New 60,000 SF additional space will be added to Jerome high school
 - A massive concern
 - There is an overcrowding problem, particularly in the Jerome area
 - Families in that area demand the best
 - There are 20 trailers right now and are moving ahead with construction
 - Same with Jerome feeder schools
 - Overcrowding is an issue with learning
 - Space has been an issue
 - District has been steadily growing over the years
 - Scioto is the least crowded
- Ideal locations for future housing in Dublin
 - Heard of Metro Place for additional growth

- Much better than empty office space
 - There will probably be a new economy that this could accommodate
 - Need to balance impact on schools
 - The city is fairly landlocked so not a lot of opportunities to grow
 - Adjacent to the downtown where there are amenities
 - Underutilized commercial space might be a good location for new housing
- Best aspects of living in Dublin
 - Everything is done well
 - Planning is elite
 - Well thought out and designed place to live
 - Sometimes it's like living in a resort
 - Everything is close and accessible
 - Good quality - many homes age well
 - New construction is well-built with good amenities
 - Good recreation amenities in community
 - Walkability in many locations
 - Good variety of rental housing
 - Lots of new builds still occurring
 - Schools
 - Quality of housing
 - Dublin has been the best with parks and rec, communication, innovation, planning and managing the community
 - What the city invests in is top notch
 - Well-maintained
 - New technologies
 - Collaborative with the community
 - People want to give back
 - Convenient location
 - River - natural amenities
 - Services: trash/recycling
 - 100 miles of bike trails
 - Ton of parks and green space
 - Roads are great
 - Great police and fire
- Biggest challenges
 - Challenges as a school district because they serve multiple jurisdictions
 - Politics can be divisive like anywhere else
 - What is the new economy going to look like and how does Dublin stay ahead of the curve?
 - Need to create opportunities for shared space for recreation
 - Parents say the rec areas aren't big enough
 - How does the city's infrastructure handle the growth in kids?

- Will there be pressure for additional recreational facilities?
- Not enough entry-level home opportunities
 - Or enough for lower-income residents
 - For example, newer immigrants have difficulty staying
- Political division in the city (as with everywhere)
- “Other side of the river” mentality
- Property taxes are high

Employers

- Impact of business on housing (and vice-versa)
 - Employees need a place to live – ideally as close to home as possible
 - Need for varying levels of workforce is broad
 - Tends to be broader at the lower end of the scale
 - Business has to draw workforce from a broad range of areas

- Housing attainability for employment base
 - Number of people who work and live in Dublin: 15%
 - Probably the higher income earners like doctors
 - Lots live in Hilliard – probably half
 - For Grady Hospital, many more live in Delaware (where hospital is located) – like 60%
 - Delaware is much more affordable
 - Very wide range of incomes – entry level to surgeons and everything in between
 - Lower-end staff can’t afford Dublin – most live in Hilliard
 - Most live in Dublin
 - Some live in Powell
 - A few live in other communities due to where spouses work
 - OSU has a lot of employees in Dublin
 - Lots of people commute to main campus from Dublin
 - Dublin and NW quadrant is among top 3 origins of OSU employees
 - Higher percentage of doctors live in Dublin
 - Lower paying staff – less
 - HR people from local businesses report that that Dublin companies can’t find employees in community
 - It’s hard to fill the lower end jobs
 - Not enough transit in the area to support those who need it
 - Companies need employees in all industries
 - Pre-Covid and post-Covid are very different
 - Remote work could change everything
 - Not the number of people coming into Dublin for work
 - Almost entirely remote
 - Concerned about housing stability, affordable housing, workforce housing

- Lower wage and young workforce are having trouble finding housing
 - People need to apply to multiple complexes with down payments
 - Volume of availability is not available
 - \$1,600 to \$ 2,000 per month rents requires a lot of up-front cash
 - Higher priced places are easier to find
 - There needs to be more transit access
 - There are a lot of last mile gaps
 - It is more expensive but all suburbs in northern suburbs is expensive
 - Lower-paid employees do not live in Dublin
- Housing attainability (general)
 - Not for lower income workforce
 - Not in Dublin
 - But there are plenty of communities nearby where lower wage earners could live
 - Seems to be enough apartments – furnished and otherwise
 - You can live east of the river and there are more affordable areas there
 - Still in Dublin school system
 - There’s a growing chasm in affordability
 - Values have skyrocketed, making it worse
 - Short supply of rental housing that’s affordable
 - Causes a significant problem for many service sectors
 - People will have to live on the other side of the river – in Columbus
 - Some of those properties are not keeping up with maintenance
 - Students find it expensive to live in apartments in Dublin
 - They tend to look in Hilliard for more affordable rents
- Types of future housing needed in Dublin
 - Diversification is important
 - Finding something affordable for seniors is impossible – but very important
 - Housing for young people
 - Bridge Park is great – a community source of pride
 - Smaller units for seniors and young professionals
 - Surprised that Jerome doesn’t go more in that direction
 - Seeing more and more demographic in leadership roles with aging parents
 - En suite need is growing
 - Largest workforce change with Baby Boomers retiring
 - These folks are trying to sell their homes
 - But want to remain in Dublin and downsize
 - Need to accommodate that
 - Housing collapse had a huge impact on housing market
 - People are a bit more reluctant to buy a house
 - Very important to attain the correct mix of housing for all needs
 - Need to forecast where existing population is going to need to live

- Need more options for people to stay in Dublin – seniors, young professionals
 - Need more ownership opportunities for various income levels
 - Bridge Park is a great model
 - City should continue to grow in that regard
 - Great for empty nesters used to an urban environment
 - What does bridging the chasm look like?
 - Where is the lack of NIMBY that will allow affordable to occur?
 - They've seen that looking at other communities with an established presence
 - Best way to deal with affordable housing is NOT SF subdivisions
 - Need housing that speaks to both the younger and older demographic
 - Smaller units to accommodate different lifestyles
 - One to two bedrooms
 - Mobility as well
 - Enough of a mixed use
 - Walkability
 - Level of mobility in transportation to make it easier
 - Senior busing has been a huge success
 - Apply that pilot to all the other populations
 - Bridge Park is great but not definition of affordable housing
 - 80% AMI is still very high in the Bridge Park area
 - Would LIHTC work in Dublin?
 - Housing for younger and lower wage workers
 - Housing for seniors
 - Many are moving out because of cost and few facilities
 - Single level
 - Smaller number of bedrooms
 - But still higher quality
 - Lower wage workers
 - Need to be careful that the existing multi-family will price out
 - Smaller lots
 - Smaller bedrooms
 - A little more density
 - New urbanist types of development
 - Doesn't have to be a high rise
 - Housing for students
 - Housing for modest income staff
 - Finding ways to accommodate first-time buyers, etc.
- Ideal locations for future housing in Dublin
 - Metro Place area
 - The Mall (Tuttle Crossing)
 - There still needs to be corporate space to lure new companies
 - Should be upgraded to lure better corporations
 - Bridge Park has been a success

- People were nervous about it
 - But people love it
 - Redeveloping underutilized areas of Dublin makes sense for new housing
 - Needs to be in walkable areas
 - Agrees with strategy of redeveloping Metro Place
 - This would balance out the other high schools (other than Jerome)
 - Metro Place won't be what it was, especially after Covid
 - Giant office buildings are not the future
 - Maybe a Bridge Park-like development?
 - You might have less push back there than other places
 - Can't lose the good education component
 - Metro Place would be a good location
 - People say its older
 - Office vacancy rates there aren't as high as people may say
 - But there could be some mixed use
 - Lots of growth happening in the NW area of Dublin
 - Good idea to continue off Bridge Park success
 - West Innovation area (Near OU facility) - just to the south of this area
 - OU is working with the city to develop senior housing near the area
- What City can do to encourage desired housing
 - Had to deal with signage
 - Brutal process!
 - But there is intrinsic value to the aesthetics
 - If you know the rules, they're not hard to follow
 - City has high standards and may take a bit more time to approve applications as a result
 - But it's OK for a better end product
 - As long as the city is reasonable and is helpful to get to a "yes"
 - Experience with developing a new facility is that city has been helpful and honest
 - Better communication about future development
 - Some frustration on getting through the process
 - City seems to have gotten better about assisting people with plans and making it easier to apply for permits
 - There may be room to improve but they've been much better
 - They may pay more attention to someone applying for a large project
 - Need to assist small businesses more when they don't have the staff
 - But that is the majority of businesses in Dublin - 80%
 - Formalizing maintenance codes to preserve lower-income housing
 - Need to approve a tax credit project
 - There's a fear that the community will rise up against
 - Need to prevent sprawl
 - Saw Mill corridor is highest poverty area in the area

- The city has been very forward-thinking with good planning
- Best aspects of living in Dublin
 - High quality
 - Good design standards
 - Schools - very high quality and lots of community support
 - Design and organization of city - lots of thought
 - Methodical development
 - Great leadership
 - Great parks
 - Bike paths - all interconnected
 - City is trying to be more tech focused
 - Variety of housing
 - Newer housing available
 - Larger homes available
 - Homes are unique
 - You get a lot for your money compared to other communities
 - Lots of universities in the region - highly educated population
 - Walkability - you can walk to downtown from some neighborhoods
 - Great golf courses and country clubs
 - Commute is relatively easy
 - Well-maintained
 - Good connectivity
 - Grounds crew is great
 - You get what you pay for
 - Recognition of the importance of maintaining distinguishing factor but remaining welcoming
 - Schools (#1)
 - Attracts business as well as residents
 - Recreation
 - Dublin has a variety of environments: historic area, Bridge Park
 - Walkable is key
 - There's a variety of housing types
 - Convenient
 - Safe
 - Good programming for senior citizens
 - Good services
 - Quality of life is unsurpassed
 - Good mix of housing options
 - Even the older neighborhoods are aging well
 - Great events that draw people from outside (Irish and 4th of July)
 - Excellent delivery of services
 - Excellent design amenities
 - The vision that city leaders have had since the 70s has been tremendous

- The design of the community is commendable
 - Revitalization of old Dublin
 - Bridge Park
 - Parks
 - Restaurants and bars
 - Schools are very strong
- Biggest challenges
 - Affordability
 - Price point is a challenge for many
 - Recent spike in housing prices
 - People wanting to come in are finding it a challenge
 - Bidding issues
 - Balancing growth and number of students
 - New housing needs to appeal to a more diverse population, particularly west of the river
 - Segregation as a result of housing values in particular areas of town
 - Affordability
 - Property tax is high – could be significant
 - Availability of housing stock
 - Need to grow – more rooftops pay for services
 - Lots of new residents who need a variety of services
 - People are living in hotels
 - Afghan refugees
 - But these folks need services
 - Initial areas that were developed – there is a need for a housing code that forces people to maintain
 - But it could be more affordable housing stock
 - There’s not enough multi-unit housing that’s affordable
 - Need to update housing code to focus more on maintenance – not just new build
 - Dublin has been diverse in skin tone but not income levels
 - City is trying to increase diversity
 - Development regulations are tough, but it maintains a good quality of life
 - Retains a high level of quality
 - Affordability is a problem
 - Corporations are buying single-family homes
 - While school district is an asset, the growth has been a challenge to schools
 - Traffic as more gets build

Regional Partners and Neighboring Municipalities

- Impact of Dublin on neighboring municipalities/the region (and vice-versa)
 - When they do subdivision reviews – impacts the incorporated edge

- Could impact Dublin
 - o Have a vote on subdivision decisions
 - o Same with zoning reviews
 - o Consumer goods and jobs are in Dublin
 - o People are traveling back and forth from region to Dublin
 - o People go there for recreation and entertainment both ways
 - o In past several years, many communities have been feeling the pressure of the housing market
 - Members asked MORPC to do this work
 - Dublin worked with MORPC to shape strategy
 - What are central housing issues?
 - What can the region do?
 - o The housing study for Dublin is a very good first step
 - o Columbus mayor wants to support suburban jurisdictions regarding housing in the region
 - Provide technical support where they can especially for smaller communities
 - o There are 43 jurisdictions in Franklin County alone
 - o 2nd most economically segregated region in the country
 - Because of fractured municipal boundaries – communities “put the gates up”
 - o People are concerned about community change, and they are real
 - o Can make a lifestyle change or keep doing the same thing
 - Can we be a sustainable and healthy community?
 - o All relying on each other in the region
 - o Need to focus on residential construction
 - o There was aggressive annexation over the past decades to acquire employment areas
 - o City reevaluated that policy about 10 years ago – examining the return on investment
 - There can be lots of expenses
 - o SF market of surrounding municipalities is tightly intertwined with Dublin
 - o Dublin doesn’t have a fire department
 - o Washington Township serves as their fire department
 - o The township predominantly overlaps Dublin
 - o If areas are to be developed, they’ll most likely be annexed into Dublin
 - o Everything is tied to public water and sewer
 - Township has no ability to provide that
 - So, whenever a develop occurs, it will be annexed
- Housing attainability (general)
 - o Getting expensive
 - o Lots of income levels
 - o Housing is attainable for some but not all

- Affordable housing will need to be subsidized
 - Not an easy solution
 - Dealing with fixed cost of land
 - It is what it is
 - Similar situation in Jerome
 - Cost of doing business
 - Folks who work in the service industry need housing
 - They don't live there
 - Affordability is a major issue
 - Even before housing bubble, Dublin was perceived as affluent
 - Dublin was always less attainable
 - But need to identify what affordability looks like
- Housing proximity to transportation/employment
 - COTA has been responsive in ensuring good transit access
 - They consider all modes of travel
 - Dublin has 3.25 jobs for every housing unit being constructed
 - Need to build housing to accommodate job growth
 - Transportation access relies on highway improvements and outside money
 - Good array of housing stock in proximity to employment
 - There is public transportation there but not sure how it impacts housing and employment in Dublin
 - Dublin has a good complete streets plan
 - Doesn't seem like Dublin has too large of an access problem aside from regular rush hour traffic
 - Types of future housing needed in Dublin
 - Housing for moderate income workers
 - Lots of housing going in in the region is SF
 - Last 5 to 6 years in Jerome Village there has been interest in smaller lots and sizes
 - 50-to-80-foot frontage
 - More interest in condo units
 - Increase walkability
 - Workforce housing
 - Near specialty restaurants and retail
 - Reoccupy existing development
 - Area is becoming more diverse in terms of household size and age
 - Need to increase the options for housing
 - The product for aging population is very limited in general
 - Need to think beyond just affordability
 - Different size options
 - It needs to diversify
 - "Affordability" – maintain through additional construction

- Make sure there's housing available for everyone in the right location for what they need
- o We have overextended with SF
- o Affordability: the need to subsidize housing cost burden
 - Franklin county has 12,500 housing voucher units
 - ¾ families that qualify don't get housing
 - 80% AMI - these are the workforce
- o Need to look at other models of wealth building
 - Condos, duplex
 - Starter home size
- o Need to think differently about affordable housing
- o Need source of income protection for renters - some communities have it
- o Anything that can reduce the need for more than one vehicle
 - Reduce by one vehicle per household
 - Reduce the need for parking
 - Reduce environmental footprint
- o Product with ground floor master is very competitive
- o More than enough SF housing in subdivisions for families
- o Seems to be a market for additional high rises (in appropriate places) and smaller bungalows with low maintenance
- o Moving in right direction for changing demographic
- o There needs to be more Bridge Park type of housing to accommodate many lifestyles
 - Condos and multi-family units
 - Housing that meets the needs of many types
 - Housing closer to amenities, particularly for older people
- o Maybe zoning needs to be examined to allow more diverse housing in more locations
- o Seen a lot of SF development but important to get more multi-family
- o Need more housing for seniors
- o Because of where Dublin is located, it's easier to develop on an infill project because they're built out
- o Creative solutions for SF to not build the same model as the past (more attainable)
- o These denser housing types would better serve a diversity of new residents
- o Land is not cheap, so increased density makes more sense
- o Density is not a bad thing - people need to be educated about that
- o The forgotten missing middle needs to be reevaluated
- o But communities continue to be faced with NIMBYs regarding higher density
- o People want a thriving downtown so revitalizing upper story stock is desirable
 - Easier way for elected officials to accept new development
- o New development shouldn't be all of the same thing of the past (SF)

- Ideal locations for future housing in Dublin
 - Near transportation and other services
 - Need to be creative about redevelopment
 - Insight 2050: what are communities going to look like?
 - Need to consider infill options
 - Greenfield development is very expensive
 - Infill is good for affordable housing
 - Metro Place: city did some visioning there for mixed-use
 - Redevelopment of tired commercial areas
 - The Columbus area is insanely over-retailed
 - Retail zoning is over-supplied
 - Need to focus strategically
 - The region is talking about growth corridors for future housing
 - Link Us corridor
 - Needs to be in a walkable area
 - To recreation
 - Downtown
 - Employment
 - Reimagining redeveloping Metro Place
 - Good location
 - Amenities nearby
 - Market isn't there for that amount of office
 - Some of those buildings could be rehabilitated
 - Sprawl is not always the answer - there needs to be a balance
 - Tuttle Crossing area but maybe that's in Columbus
 - It probably won't go over well in the mostly SF established neighborhood, but these types of areas would probably benefit from a more diverse type of development
 - Around the hospital area to serve those who work there
 - Also, around the industrial area off Route 33

- What City can do to encourage desired housing
 - Allowing it to happen without the red tape
 - Entitling costs are very high in Dublin
 - Smaller developers are less likely to develop there
 - Value capture opportunities? For public policy goals
 - Concentrate on developing on sites that are marginally used and don't bring a lot of value
 - Anywhere the process can be streamlined it should happen
 - PUDs are complicated
 - Burdens should be reduced
 - Lots of interest from developers because of its location
 - Dublin doesn't seem to need incentives
 - People want to be there, and developers can make money

- Removing some red tape would be advantageous to make it more of a straightforward process
- Code should also clearly lay out what you want
- Developers know what to expect
- Need to balance growth and strategic growth: where is residential appropriate and where is open space preservation a priority
- Should be a public private partnership
- Most developers in the area are good about that
 - Most in the area do their homework so that's helpful
 - Need to create the notion that it's not all about just the bottom line
 - But they need to remember that they're from the outside and residents have a legitimate concern for the future of their community
- Best aspects of living in Dublin
 - They pay careful attention to detail
 - Bridge Park is a great model
 - Strong indication that this type of development can be successful
 - Good housing stock
 - Schools
 - Recreation opportunities
 - Lifestyle
 - Variety of housing types
 - Bridge Park is amazing
 - Product is there but affordability is a problem
 - Kudos to Dublin for trying it - very successful
 - Dublin does a great job in getting infrastructure right
 - Connectivity is extraordinary
 - High citizen satisfaction with services
 - Great location - highways, downtown
 - Good mix of old and new
 - Bridge Park as gone over very well
 - Pockets of housing in Dublin that are exclusive but there is a mix
 - It has changed significantly
 - People are excited and want to live there
 - Provides suburban lifestyle that many seek
 - Decent mix of housing types
 - It accommodates people at different stages of their lives
 - They have the mix that PC needs, like rental housing
 - There's a push for the empty nester population
 - Dublin is doing a good job providing housing for professionals
- Biggest challenges
 - Affordability - a lot of consideration has been made of what that could be
 - Not a lot of higher-density housing

- Need to be building 14,000+ units annually to keep up in the region
- Not enough housing in general
- Affordability is eroding
- SF housing
 - Dublin is not as bad as some of the other suburbs
- Need to lean into “gentle density”
 - Generally smaller-scale projects can be too expensive
- School funding depends on property taxes
- People feel very protective about schools
- Need to support smaller-scale developers
- Entry fees are prohibitive in Dublin for small developers
- Housing stock is heavily single family because of schools
- Mostly uniform in its lot and floor area
- Only variety of housing types are on the fringes
- Many in Dublin are just one degree shy of not wanting others to come
 - You need to allow new people into the community to create more dense developments
- Stringent building codes
- Pressure on school district with growth
- It gets more challenging as a community gets built out
- Dublin has to consider redevelopment if they’re looking to diversify its housing stock
- Dublin developed as SF housing as the primary model – now they need to diversify

Mobility and Transportation Partners

- Impact of Dublin on transportation (and vice-versa)
 - Dublin voted to be entirely within COTA service area
 - Dublin has grown in a way that has promoted car use, so transit is needed
 - Dublin is traditionally not transit supportive in its development pattern
 - Big setbacks requiring crossing large parking lots
 - COTA is maxed out regarding resources right now
 - Bus stops in Dublin don’t meet standards for bus shelters
 - Lack of a grid pattern that’s friendly toward transit
 - Serving the community is difficult
- Housing attainability (general)
 - Prices are often over \$300K
 - Price points are a challenge
 - Other suburbs are experiencing the same thing
- Housing proximity to transportation/employment
 - A lot of focus is getting people from bus stops to their place of employment
 - Dublin Connector – paid for by city and federal

- Free service for eligible residents (over 55 or disabled)
 - Started as a circulator with defined routes
 - They can now provide on-demand service
 - Hours are limited but trying to expand
 - Five bus lines in Dublin
 - 45 bus stops and only one shelter
 - Trying to do small steps to demonstrate success
 - One issue is driver shortage
 - Good extensive shared use path system – 130 miles
 - Work on bringing on regional bikeshare to Dublin
 - Hope to launch scooters in Dublin
 - Traditional SF growth pattern has made transit difficult
 - Seems to be improving in Dublin
 - Mindset is changing to expand zoning beyond just one use (residential or office only)
- Types of future housing needed in Dublin
 - Need more workforce and first-time homebuyer housing
 - Housing for seniors
 - Smaller units: 1 to 2-bedroom
 - Under \$250,000
 - Higher density
 - No more McMansions
 - More diverse housing in terms of size and affordability
 - Ideal locations for future housing in Dublin
 - Metro Place – legacy office with amenities and restaurants
 - Where can it be a benefit and not a cost
 - Mixed use with office and residential
 - West Innovation District area
 - Housing would be a good component there
 - Overbuilt shopping areas
 - Metro Place
 - Between 270 and Saw Mill Road
 - Around Perimeter Road – single-story shopping area
 - Vacant office areas
 - Plans to expand transportation network
 - Lots of expansion:
 - Paths – fill in gaps
 - Expand shuttle service
 - Invest in bus stops for last mile
 - Vision zero efforts
 - Bike loop system – a 10-mile themed path (public art, ice cream)

- New paving
 - o Looking at mobility ecosystem to support housing
 - o Working with regional partners to build a bus-rapid transit line from downtown Columbus to Dublin
 - o Funding is limited so COTA has to invest strategically
 - o COTA is pulled in many directions across the service area
 - Need to explore new routes with new growth
 - o COTA Plus – a system that would serve non-service area
 - Piloted in certain areas
 - Run by app to request a ride
 - Almost door to door
 - From a bus stop its free
 - o Link Us: a MORPC initiative to connect region with service
- What City can do to encourage desired housing
 - o Promote the correct message to constituents to clarify that density is good
- Best aspects of living in Dublin
 - o High standards for quality
 - o Emphasis on infrastructure
 - o Good diversity in terms of variety of ages
 - o Schools
 - o Recreation – 64 parks
 - o Good transportation network
 - o The services are unmatched
 - o Good schools
 - o They are getting more diverse in housing styles
 - o Known for golfing community
 - o Bike paths and facilities are a big advantage
- Biggest challenges
 - o Affordability is an issue
 - o High standards can have a negative impact on affordability
 - o It's easy to get around in Dublin but difficult to get TO Dublin
 - o Keeping housing affordable
 - o Lack of opportunity with the traditional housing pattern
 - HOAs with strict rules

Social Service Agencies and Advocacy Groups

- Transportation
 - o It's a huge problem in Columbus, not just in Dublin.
 - o COTA is there and there's not a ride service which helps.

- Affordable Housing
 - We definitely need affordable housing. Some people are scared of that term, but it's a real need right now.
 - We have racial diversity in Dublin, but we don't have economic diversity. The minority residents are highly educated, high wage earners that can afford to live in Dublin.
 - People can't afford to live in Dublin
 - Huge lack of affordable housing
 - People live there because of the schools and have to live on the periphery
 - Dublin is very expensive
 - It's hard to catch up economically
 - It's expensive and unaffordable

- Socio-economic diversity
 - Housing stock is pretty self-selective
 - It's hard to find affordable housing (SF residence)
 - Many people in Dublin want to keep it that way forever
 - Compared to 20 years ago, it's very different
 - School district is doing very well
 - Very limited space for additional housing
 - When families grow, many people still want to stay
 - How do you make housing available to more people?
 - This will add children to the school district
 - Maybe need a collaboration with other cities?
 - USDA a few years ago have allowed food need self-declaration
 - People with expensive cars have come to the pantry
 - Others who can't afford to live in Dublin struggle to do so for schools
 - There's a whole other system that keeps people out
 - Selection manifested through minimum lot sizes, design standards, etc.
 - People fear change especially "multi"
 - Dublin will risk being behind if they stay as-is
 - Dublin embraced Afghan refugees but not necessarily other minority groups
 - Bridge Park has seemed to only attract wealthier residents
 - Developer is planning affordable units
 - People accept it because it's a self-contained area
 - If this were built closer to a SF community, there would be an opposition
 - People nearby Metro Place in SF neighborhood are opposed to high density
 - Before Bridge Park was created housing market was already doing well
 - Need to look at demand side: who wants to get into Dublin?

- Seniors
 - There are people in Dublin with lower incomes and a lot of need.
 - Forever Dublin is a program offered by the City and Syntero to assist seniors wishing to stay in their homes for the long term.

- Trained navigators assist residents on resources and programs available.
 - o Bridge Park is beautiful and a lot of seniors live there. The high cost is prohibiting a diversity of incomes to reside there.
 - o Friendship Village is working with Crawford Hoying to build senior housing. Residents, who live independent active lifestyles, can tap into the resources and programming Friendship Village offers.
 - The prices will be very high and again will be exclusive to high income seniors.
- Biggest challenges
 - o There is a balance between more housing and the ability of our schools to absorb.
 - o Should other communities be encouraged to develop like Dublin to ease the pressure on development in Dublin?
 - o Suburban hunger is becoming an increasing problem
 - o People will move to Dublin and double and triple up because of the schools
 - o But every suburban area surrounding Columbus is facing many of the same things
 - o People can't afford to live in Dublin
 - o People live there because of the schools and have to live on the periphery
- Thoughts on Intel coming to region
 - o It's a threat: people in the area who need jobs won't be hired by Intel, but its presence will raise prices
 - o It would be ideal if they could offer workforce training
 - o Opportunity from an ED standpoint
 - But from housing and socio-economic diversity, it is a threat
 - o Wherever there's a cluster of tech jobs, there's an affordability problem
- Ideas on strategies for improving housing in Dublin
 - o Vouchers for tenants? Probably not sustainable
 - How do we make people better equipped to afford housing?
 - How does Dublin provide incentives to support housing?
 - Better transportation for them to commute?
 - o Need to resolve supply and demand issue - annexing is not the answer
 - o Large companies need to build housing for their workers
 - o People need to not be afraid of others who are different - we all want the same thing
 - o People don't want to change the nature of their community
 - o Some of this may not change quickly - it may take a generation
 - What does it mean to Dublin residents as they age?
 - What's the future of Dublin in 30 or 40 years?
 - Need to prepare for that and realize what's happening now?

- Young people who can afford to come back will be a very selective group of people
- Need to have more capacity to accommodate seniors
 - But it needs to be more affordable

Neighborhood Associations

- General impressions for Dublin:
 - City has been great at building parks, trails.
 - Community facilities (fire stations, library, etc) are good.
 - People want to send their kids to Hopewell Elementary (East Dublin).
 - The Dublin name has cache. Methodist Hospital planned for some generic directional name “Northwest” something but went with Dublin Methodist because Dublin carried with it more appealing to people.
 - Very happy living in Dublin But paying dearly in taxes and seeing what that tax payment is paying.
- Housing stock
 - Housing market is tremendously strong. Very expensive housing.
 - Some of the older rentals don’t see to be doing very well (e.g., Sycamore Ridge and other similar types that are “barracks” style are aging).
 - Other than a few older apartments, people are taking good care of their homes.
 - What’s going to happen 15-20 years down the line for Sycamore Ridge, Tuller Flats?
- Housing diversity
 - If you can build a nice \$250,000 home, young people will really like them. But we haven’t planned for that.
 - There are nearby communities (outside Dublin) that do provide less expensive housing. Marysville, for example, is well set up to absorb the housing demand.
 - Workforce housing should be accommodated throughout Dublin, not just a few locations within Dublin. Distribute small batches of workforce housing throughout the city and not concentrate them in a few or single building.
 - There are some pockets of affordable homes in Dublin – for example, smaller condos behind Giant Eagle and some other areas. We need more of that, but we need to carefully consider the impact to schools.
 - Scioto Crossing does look very nice – Ryan Homes. SFR detached. Density was really high (legacy zoning).
 - Bridge Park is a terrific place for empty nesters.
 - Cardinal Health wanted housing for white color young people, but it turned out to be mostly older folks that live there.
 - If you want younger people, you have to make them less expensive.

- The urbanization at Bridge Park – not a real fan. There’s so much traffic and there’s nowhere to park in the historic downtown. Unless you’re a pedestrian, it’s a difficult place to go.
 - Not a fan of the tax abatement (10 years?).
 - I think there may be a place for that, but Bridge park seemed to have crammed in too much in a small area.
 - Unless you’re a pedestrian
- Seniors
 - People in communities like Muirfield would like to stay in Dublin, but there aren’t too many single floor living units.
 - Hawthorn Commons – apparently there’s a waiting list?
 - Not sure about legality of building standards but having at least one entry be designed without steps. Think we can do better in the long run, if we require no step entry and 36” door. First level bathroom, some accommodation for ADA.
 - Dublin doesn’t have enough senior developments. We have a healthcare service that’s growing, and people don’t have to go to downtown for medical services.
 - More housing that is within short distance to medical care would be attracted to seniors.
- Building and design standards:
 - All in favor of high standards. Wished there were more in place (e.g., mandating three car garages for bigger houses – don’t like cars parked on the street).
 - Historically, standards were instituted when corporate entity (Ashland Chemical) wanted to be Dublin and wanted high standards for housing. Second factor – Jack Nicholas wanted standards in Hilton Head to be duplicated to Dublin.
 - We know we have high standards, but we haven’t lacked people (builders) who grudgingly abided by them.
 - Believe builders will make more money if they can build with cheaper. Understand why builders would want less standards.
- Miscellaneous
 - Office uses – we’re just emerging from COVID, and we don’t know the long-term future for office, but council would like to reserve space for office users.
 - Balancing the commercial to resident uses is key for Dublin.
 - Preserving near-highway parcels are good policy to attract corporate office users.
 - Metro Center – surprised to hear that it’s not doing well. Understands why the City is moving toward a mixed-use development there.
 - Would like to see more amenities there (cafes, restaurants).

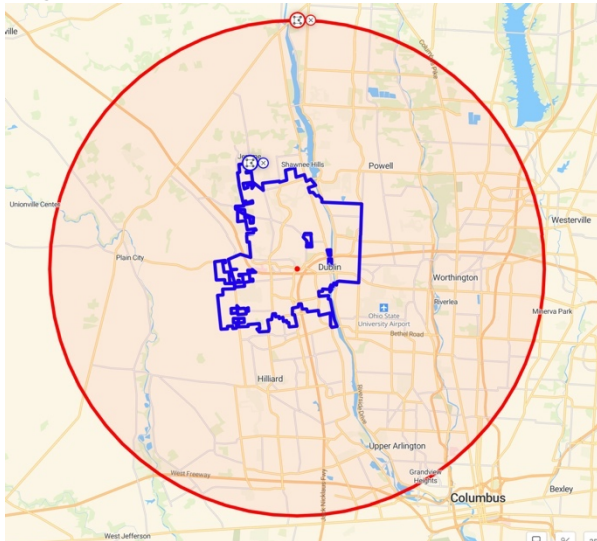
- Just because it looks nice as an office park doesn't mean that people will enjoy living there.
- o Jerome Township seems to be picking up a lot of development momentum, but worried about the impact (e.g., traffic).
- o Dublin schools (over-subscribed because Jerome Village is going to be 4500 units).

Appendix 2: Residential Tapestry Segmentation

In addition to the traditional demographic data from the U.S. Census Bureau, a Psychographic Segmentation was analyzed for area residents. Whereas the census data provide historical resident profiles in a particular geographic location, psychographics broadens the scope by identifying lifestyle habits, values, attitudes, and other defining attributes.

For this analysis, ESRI Tapestry Segmentation dataset—which classifies resident groups into 67 unique segments in easy-to-visualize terms based not only on demographics but also on socioeconomic characteristics—was analysis for residents within a 10-mile radius from Dublin (see Figure 57).

Figure 57: Map of Primary Market Area, 10-mile Radius from Dublin



Source: ESRI, PolicyMap, Urban Partners

The 10-mile radius includes all or portions of nearby communities of Hilliard, Plain City, Powell, Upper Arlington, and Worthington—in addition to portions of the City of Columbus and Concord, Liberty, and Orange Townships in Delaware County. PolicyMap estimates that approximately 569,000 people reside within this 10-mile radius.

According to ESRI, the segment called *Emerald City* is the most prevalent in the 10-mile radius, followed by *In Style*, *Enterprising Professionals*, *Boomburbs*, and *Young and Restless*. Thirty-three percent (33.4%) of all households fall in one of these five segments (Table 45).

Table 45: Top ESRI Tapestry Segments

	10-Mile Radius Area Households %	All U.S. Households %
1. Emerald City	7.5%	1.4%
2. In Style	7.1%	2.2%
3. Enterprising Professionals	6.4%	1.4%
4. Boomburbs	6.3%	1.8%
5. Young and Restless	6.1%	1.8%

Source: ESRI, Urban Partners

The following pages show detailed profiles for the top segments.



Tapestry Segmentation Area Profile

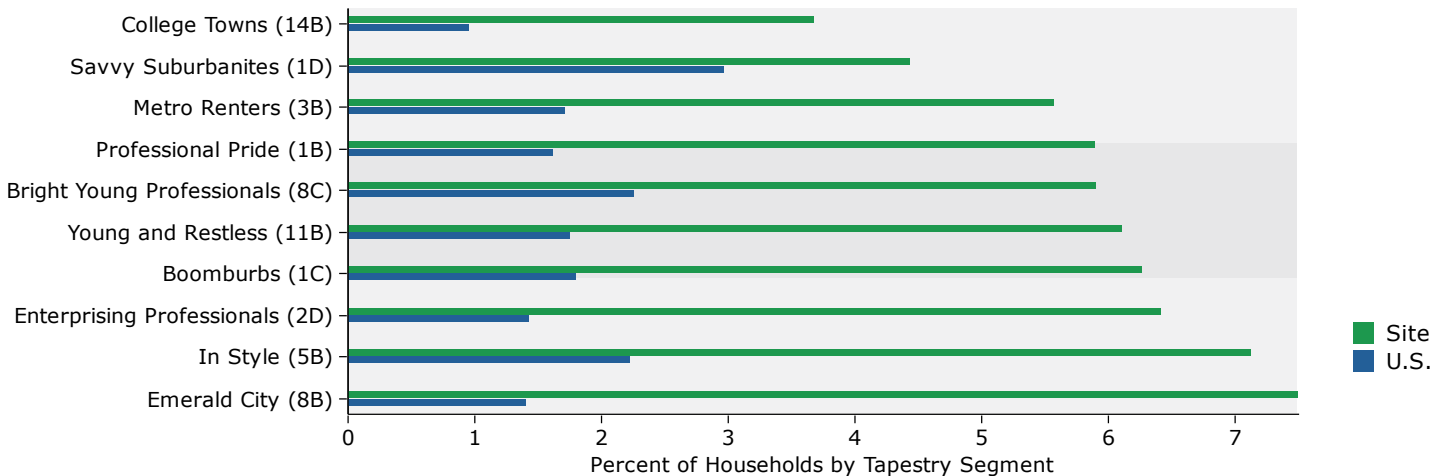
5555 Perimeter Dr
 5555 Perimeter Dr, Dublin, Ohio, 43017
 Ring: 10 mile radius

Prepared by Esri
 Latitude: 40.10208
 Longitude: -83.13945

Top Twenty Tapestry Segments

Rank	Tapestry Segment	2021 Households		2021 U.S. Households		Index
		Percent	Cumulative Percent	Percent	Cumulative Percent	
1	Emerald City (8B)	7.5%	7.5%	1.4%	1.4%	530
2	In Style (5B)	7.1%	14.6%	2.2%	3.7%	319
3	Enterprising Professionals (2D)	6.4%	21.1%	1.4%	5.1%	449
4	Boomburbs (1C)	6.3%	27.3%	1.8%	6.9%	347
5	Young and Restless (11B)	6.1%	33.4%	1.8%	8.6%	348
Subtotal		33.4%		8.6%		
6	Bright Young Professionals (8C)	5.9%	39.4%	2.3%	10.9%	261
7	Professional Pride (1B)	5.9%	45.3%	1.6%	12.5%	362
8	Metro Renters (3B)	5.6%	50.8%	1.7%	14.3%	324
9	Savvy Suburbanites (1D)	4.4%	55.3%	3.0%	17.2%	150
10	College Towns (14B)	3.7%	59.0%	1.0%	18.2%	385
Subtotal		25.5%		9.6%		
11	Workday Drive (4A)	3.6%	62.6%	3.0%	21.2%	122
12	Up and Coming Families (7A)	3.6%	66.2%	2.6%	23.8%	137
13	Rustbelt Traditions (5D)	3.2%	69.3%	2.2%	25.9%	146
14	Top Tier (1A)	3.0%	72.3%	1.7%	27.6%	179
15	Exurbanites (1E)	2.8%	75.2%	1.9%	29.5%	147
Subtotal		16.2%		11.4%		
16	Metro Fusion (11C)	2.7%	77.8%	1.4%	30.9%	190
17	Dorms to Diplomas (14C)	2.7%	80.5%	0.5%	31.4%	522
18	Urban Chic (2A)	2.4%	82.9%	1.3%	32.7%	186
19	Home Improvement (4B)	2.2%	85.1%	1.7%	34.4%	132
20	Old and Newcomers (8F)	2.0%	87.1%	2.3%	36.7%	86
Subtotal		12.0%		7.2%		
Total		87.1%		36.7%		237

Top Ten Tapestry Segments Site vs. U.S.



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

Source: Esri

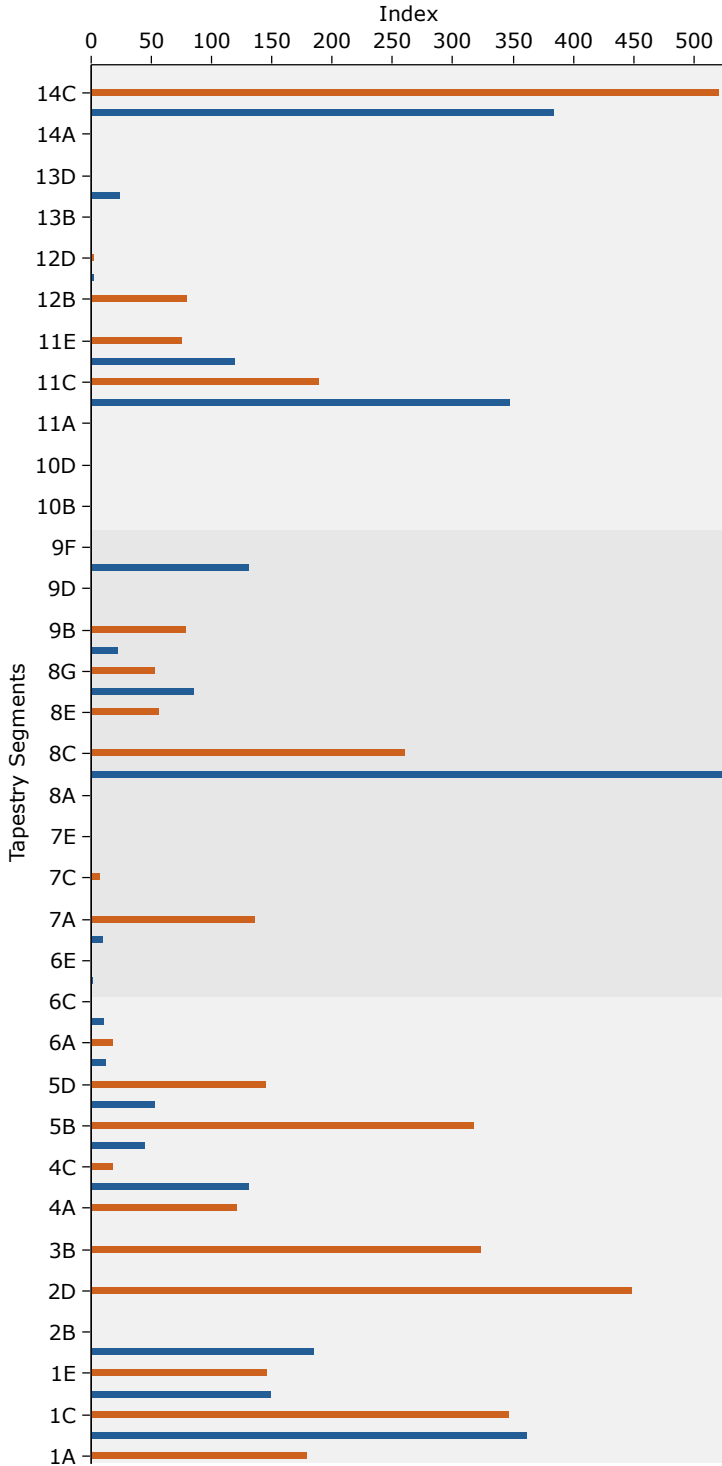


Tapestry Segmentation Area Profile

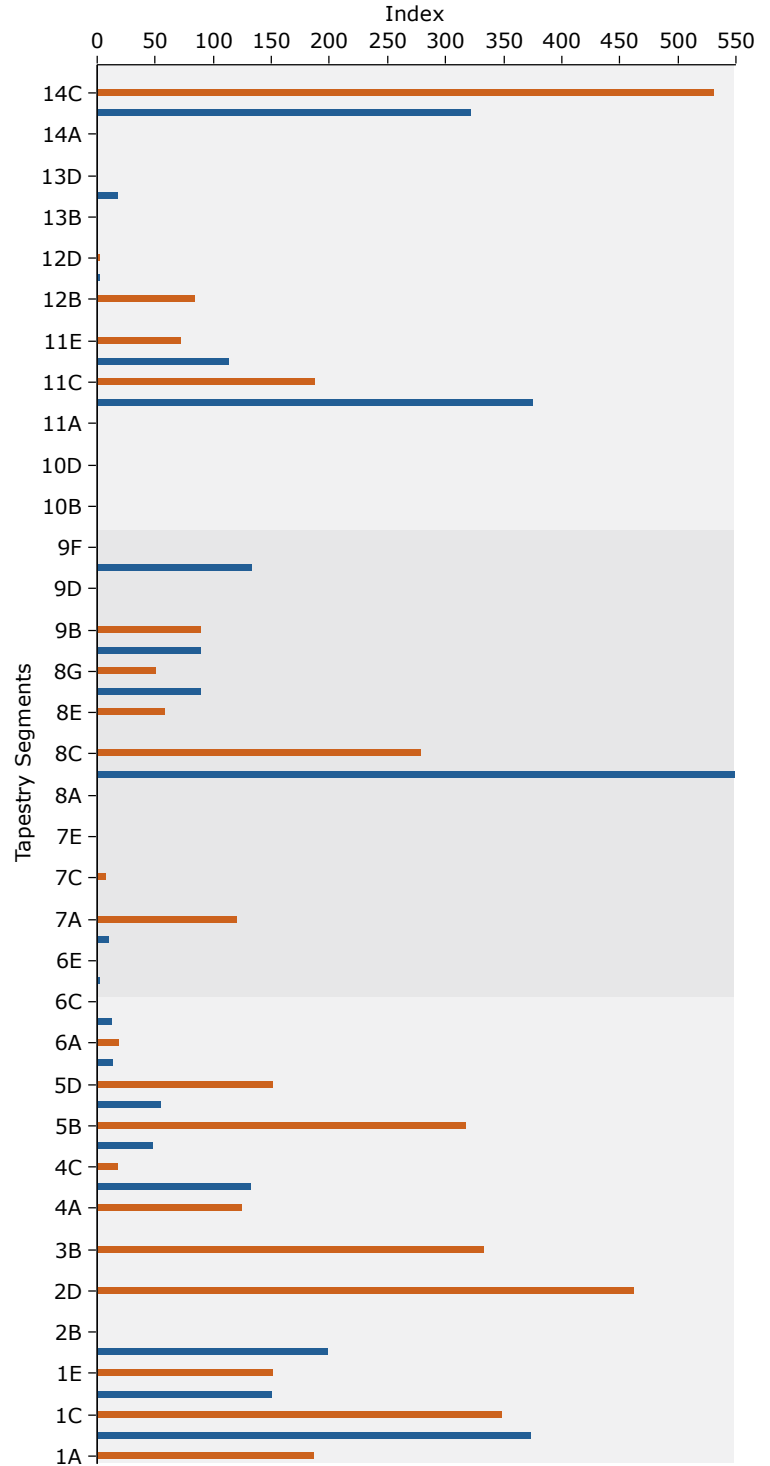
5555 Perimeter Dr
 5555 Perimeter Dr, Dublin, Ohio, 43017
 Ring: 10 mile radius

Prepared by Esri
 Latitude: 40.10208
 Longitude: -83.13945

2021 Tapestry Indexes by Households



2021 Tapestry Indexes by Total Population 18+



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

Source: Esri



Tapestry Segmentation Area Profile

5555 Perimeter Dr
 5555 Perimeter Dr, Dublin, Ohio, 43017
 Ring: 10 mile radius

Prepared by Esri
 Latitude: 40.10208
 Longitude: -83.13945

Tapestry LifeMode Groups	2021 Households			2021 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	239,374	100.0%		457,975	100.0%	
1. Affluent Estates	53,707	22.4%	224	113,128	24.7%	231
Top Tier (1A)	7,122	3.0%	179	15,099	3.3%	187
Professional Pride (1B)	14,117	5.9%	362	31,592	6.9%	375
Boomburbs (1C)	15,004	6.3%	347	30,784	6.7%	349
Savvy Suburbanites (1D)	10,643	4.4%	150	22,194	4.8%	151
Exurbanites (1E)	6,821	2.8%	147	13,459	2.9%	152
2. Upscale Avenues	21,167	8.8%	159	39,390	8.6%	148
Urban Chic (2A)	5,778	2.4%	186	11,146	2.4%	199
Pleasantville (2B)	0	0.0%	0	0	0.0%	0
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Enterprising Professionals (2D)	15,389	6.4%	449	28,244	6.2%	463
3. Uptown Individuals	13,339	5.6%	145	20,398	4.5%	142
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	13,339	5.6%	324	20,398	4.5%	334
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
4. Family Landscapes	15,399	6.4%	84	32,157	7.0%	88
Workday Drive (4A)	8,689	3.6%	122	18,406	4.0%	126
Home Improvement (4B)	5,365	2.2%	132	11,151	2.4%	133
Middleburg (4C)	1,345	0.6%	19	2,600	0.6%	19
5. GenXurban	30,608	12.8%	114	56,391	12.3%	114
Comfortable Empty Nesters (5A)	2,704	1.1%	46	5,440	1.2%	49
In Style (5B)	17,082	7.1%	319	30,366	6.6%	318
Parks and Rec (5C)	2,518	1.1%	54	4,878	1.1%	56
Rustbelt Traditions (5D)	7,561	3.2%	146	14,254	3.1%	152
Midlife Constants (5E)	743	0.3%	13	1,453	0.3%	14
6. Cozy Country Living	2,900	1.2%	10	6,072	1.3%	11
Green Acres (6A)	1,447	0.6%	19	3,089	0.7%	20
Salt of the Earth (6B)	826	0.3%	12	1,769	0.4%	13
The Great Outdoors (6C)	0	0.0%	0	0	0.0%	0
Prairie Living (6D)	46	0.0%	2	121	0.0%	3
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	581	0.2%	11	1,093	0.2%	11
7. Sprouting Explorers	8,882	3.7%	52	16,009	3.5%	42
Up and Coming Families (7A)	8,589	3.6%	137	15,348	3.4%	121
Urban Villages (7B)	0	0.0%	0	0	0.0%	0
Urban Edge Families (7C)	293	0.1%	8	661	0.1%	9
Forging Opportunity (7D)	0	0.0%	0	0	0.0%	0
Farm to Table (7E)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

Source: Esri



Tapestry Segmentation Area Profile

5555 Perimeter Dr
 5555 Perimeter Dr, Dublin, Ohio, 43017
 Ring: 10 mile radius

Prepared by Esri
 Latitude: 40.10208
 Longitude: -83.13945

Tapestry LifeMode Groups	2021 Households			2021 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	239,374	100.0%		457,975	100.0%	
8. Middle Ground	40,515	16.9%	157	71,547	15.6%	156
City Lights (8A)	0	0.0%	0	0	0.0%	0
Emerald City (8B)	17,964	7.5%	530	30,477	6.7%	550
Bright Young Professionals (8C)	14,148	5.9%	261	26,106	5.7%	280
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	2,131	0.9%	57	4,086	0.9%	59
Old and Newcomers (8F)	4,746	2.0%	86	8,164	1.8%	90
Hometown Heritage (8G)	1,526	0.6%	54	2,714	0.6%	52
9. Senior Styles	6,762	2.8%	49	11,694	2.6%	51
Silver & Gold (9A)	432	0.2%	23	734	0.2%	22
Golden Years (9B)	2,548	1.1%	80	4,826	1.1%	90
The Elders (9C)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	0	0.0%	0	0	0.0%	0
Retirement Communities (9E)	3,782	1.6%	132	6,134	1.3%	134
Social Security Set (9F)	0	0.0%	0	0	0.0%	0
10. Rustic Outposts	0	0.0%	0	0	0.0%	0
Southern Satellites (10A)	0	0.0%	0	0	0.0%	0
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Economic BedRock (10C)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	0	0.0%	0	0	0.0%	0
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
11. Midtown Singles	26,576	11.1%	180	44,188	9.6%	178
City Strivers (11A)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	14,618	6.1%	348	24,133	5.3%	376
Metro Fusion (11C)	6,387	2.7%	190	11,266	2.5%	189
Set to Impress (11D)	3,973	1.7%	120	6,192	1.4%	115
City Commons (11E)	1,598	0.7%	77	2,597	0.6%	73
12. Hometown	3,892	1.6%	27	7,283	1.6%	28
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	3,675	1.5%	81	6,873	1.5%	85
Small Town Simplicity (12C)	115	0.0%	3	235	0.1%	3
Modest Income Homes (12D)	102	0.0%	3	175	0.0%	3
13. Next Wave	438	0.2%	5	745	0.2%	4
Diverse Convergence (13A)	0	0.0%	0	0	0.0%	0
Family Extensions (13B)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	438	0.2%	24	745	0.2%	19
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
14. Scholars and Patriots	15,189	6.3%	393	38,973	8.5%	374
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
College Towns (14B)	8,825	3.7%	385	15,271	3.3%	323
Dorms to Diplomas (14C)	6,364	2.7%	522	23,702	5.2%	532
Unclassified (15)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

Source: Esri



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Tapestry Urbanization Groups	2021 Households			2021 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	239,374	100.0%		457,975	100.0%	
1. Principal Urban Center	13,777	5.8%	81	21,143	4.6%	70
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	13,339	5.6%	324	20,398	4.5%	334
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
City Strivers (11A)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	438	0.2%	24	745	0.2%	19
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
2. Urban Periphery	28,491	11.9%	72	52,462	11.5%	65
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Rustbelt Traditions (5D)	7,561	3.2%	146	14,254	3.1%	152
Urban Villages (7B)	0	0.0%	0	0	0.0%	0
Urban Edge Families (7C)	293	0.1%	8	661	0.1%	9
Forging Opportunity (7D)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0
City Lights (8A)	0	0.0%	0	0	0.0%	0
Bright Young Professionals (8C)	14,148	5.9%	261	26,106	5.7%	280
Metro Fusion (11C)	6,387	2.7%	190	11,266	2.5%	189
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Modest Income Homes (12D)	102	0.0%	3	175	0.0%	3
Diverse Convergence (13A)	0	0.0%	0	0	0.0%	0
Family Extensions (13B)	0	0.0%	0	0	0.0%	0
3. Metro Cities	86,284	36.0%	199	160,709	35.1%	210
In Style (5B)	17,082	7.1%	319	30,366	6.6%	318
Emerald City (8B)	17,964	7.5%	530	30,477	6.7%	550
Front Porches (8E)	2,131	0.9%	57	4,086	0.9%	59
Old and Newcomers (8F)	4,746	2.0%	86	8,164	1.8%	90
Hometown Heritage (8G)	1,526	0.6%	54	2,714	0.6%	52
Retirement Communities (9E)	3,782	1.6%	132	6,134	1.3%	134
Social Security Set (9F)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	14,618	6.1%	348	24,133	5.3%	376
Set to Impress (11D)	3,973	1.7%	120	6,192	1.4%	115
City Commons (11E)	1,598	0.7%	77	2,597	0.6%	73
Traditional Living (12B)	3,675	1.5%	81	6,873	1.5%	85
College Towns (14B)	8,825	3.7%	385	15,271	3.3%	323
Dorms to Diplomas (14C)	6,364	2.7%	522	23,702	5.2%	532

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

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	Number	Percent	Index	Number	Percent	Index
Total:	239,374	100.0%		457,975	100.0%	
4. Suburban Periphery	106,462	44.5%	139	214,754	46.9%	143
Top Tier (1A)	7,122	3.0%	179	15,099	3.3%	187
Professional Pride (1B)	14,117	5.9%	362	31,592	6.9%	375
Boomburbs (1C)	15,004	6.3%	347	30,784	6.7%	349
Savvy Suburbanites (1D)	10,643	4.4%	150	22,194	4.8%	151
Exurbanites (1E)	6,821	2.8%	147	13,459	2.9%	152
Urban Chic (2A)	5,778	2.4%	186	11,146	2.4%	199
Pleasantville (2B)	0	0.0%	0	0	0.0%	0
Enterprising Professionals (2D)	15,389	6.4%	449	28,244	6.2%	463
Workday Drive (4A)	8,689	3.6%	122	18,406	4.0%	126
Home Improvement (4B)	5,365	2.2%	132	11,151	2.4%	133
Comfortable Empty Nesters (5A)	2,704	1.1%	46	5,440	1.2%	49
Parks and Rec (5C)	2,518	1.1%	54	4,878	1.1%	56
Midlife Constants (5E)	743	0.3%	13	1,453	0.3%	14
Up and Coming Families (7A)	8,589	3.6%	137	15,348	3.4%	121
Silver & Gold (9A)	432	0.2%	23	734	0.2%	22
Golden Years (9B)	2,548	1.1%	80	4,826	1.1%	90
The Elders (9C)	0	0.0%	0	0	0.0%	0
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
5. Semirural	2,041	0.9%	9	3,928	0.9%	9
Middleburg (4C)	1,345	0.6%	19	2,600	0.6%	19
Heartland Communities (6F)	581	0.2%	11	1,093	0.2%	11
Farm to Table (7E)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	0	0.0%	0	0	0.0%	0
Small Town Simplicity (12C)	115	0.0%	3	235	0.1%	3
6. Rural	2,319	1.0%	6	4,979	1.1%	6
Green Acres (6A)	1,447	0.6%	19	3,089	0.7%	20
Salt of the Earth (6B)	826	0.3%	12	1,769	0.4%	13
The Great Outdoors (6C)	0	0.0%	0	0	0.0%	0
Prairie Living (6D)	46	0.0%	2	121	0.0%	3
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Southern Satellites (10A)	0	0.0%	0	0	0.0%	0
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Economic BedRock (10C)	0	0.0%	0	0	0.0%	0
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

Source: Esri



LifeMode Group: Middle Ground

Emerald City

8B

Households: 1,748,600

Average Household Size: 2.06

Median Age: 37.4

Median Household Income: \$59,200

WHO ARE WE?

Emerald City's denizens live in lower-density neighborhoods of urban areas throughout the country. Young and mobile, they are more likely to rent. Half have a college degree and a professional occupation. Incomes close to the US median come primarily from wages, investments, and self-employment. This group is highly connected, using the Internet for entertainment and making environmentally friendly purchases. Long hours on the Internet are balanced with time at the gym. Many embrace the "foodie" culture and enjoy cooking adventurous meals using local and organic foods. Music and art are major sources of enjoyment. They travel frequently, both abroad and domestically.

OUR NEIGHBORHOOD

- There are mostly older, established neighborhoods with homes built before 1960; around 30% built before 1940.
- Just over half of all homes are renter occupied.
- Single-person and nonfamily types make up over half of all households.
- Median home value and average rent are slightly above the US levels; around half of owned homes are worth \$150,000–\$300,000.

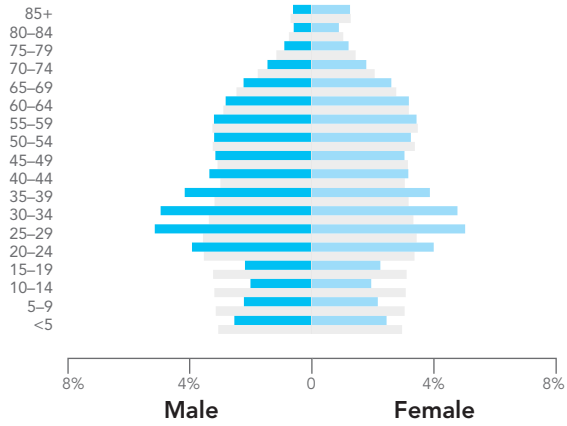
SOCIOECONOMIC TRAITS

- Consumers research products carefully before making purchases.
- They buy natural, green, and environmentally friendly products.
- Very conscious of nutrition, they regularly buy and eat organic foods.
- Cell phones and text messaging are a huge part of everyday life.
- They place importance on learning new things to keep life fresh and variable.
- They are interested in the fine arts and especially enjoy listening to music.

AGE BY SEX (Esri data)

Median Age: **37.4** US: 38.2

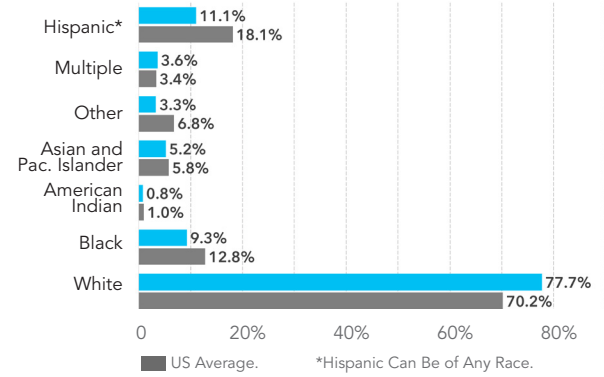
■ Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **50.6** US: 64.0



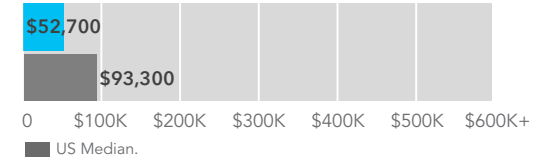
INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

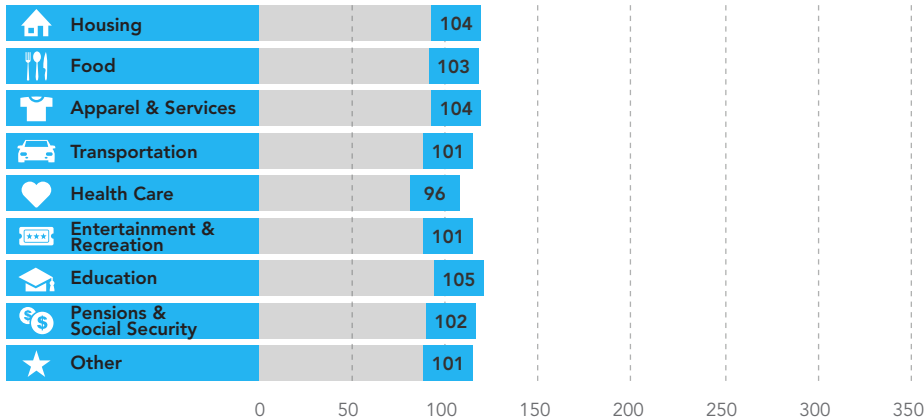


Median Net Worth



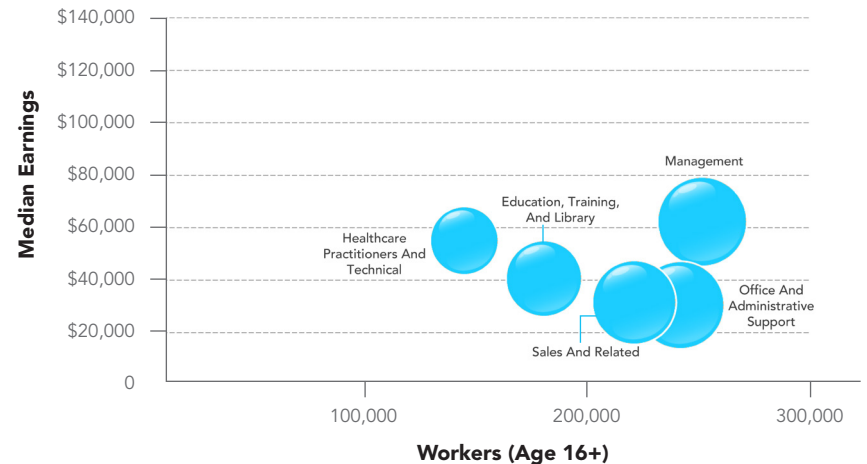
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- Liberal segment that contributes to NPR and PBS.
- Shop at Trader Joe’s and Whole Foods.
- Budget time—utilize home cleaning services so there’s time for yoga.
- Use the web for professional networking, blogging, making travel plans, shopping, and sports news.
- Read magazines and books on a tablet, sometimes while exercising at home.
- Attend venues like art galleries, museums, and concerts. At home they like to cook and bake.

HOUSING

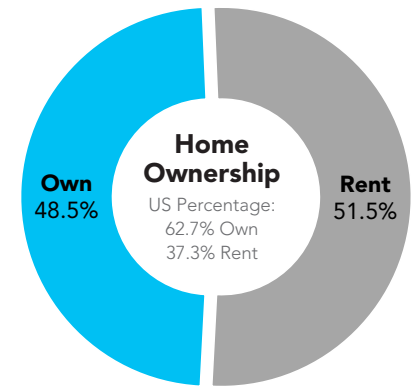
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau’s American Community Survey.



Typical Housing:
Single Family;
Multi-Units

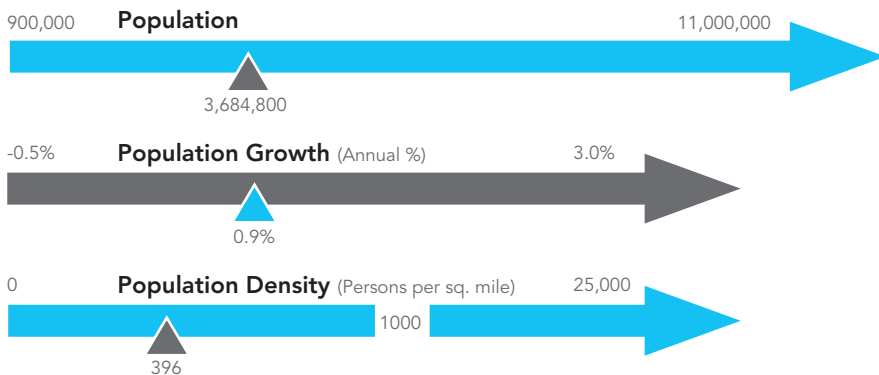
Average Rent:
\$1,087

US Average: \$1,038



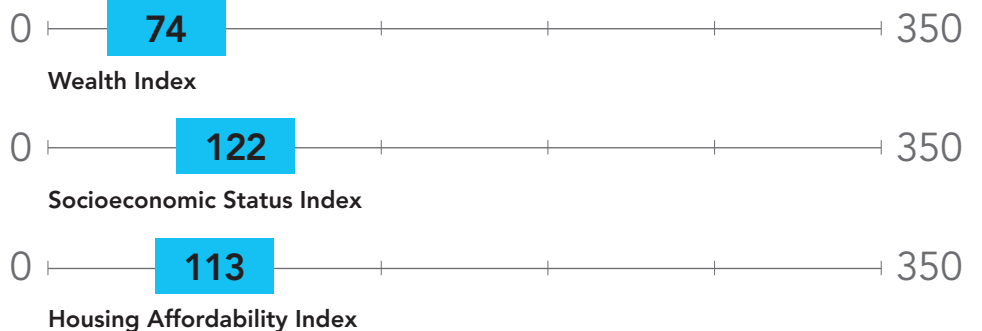
POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

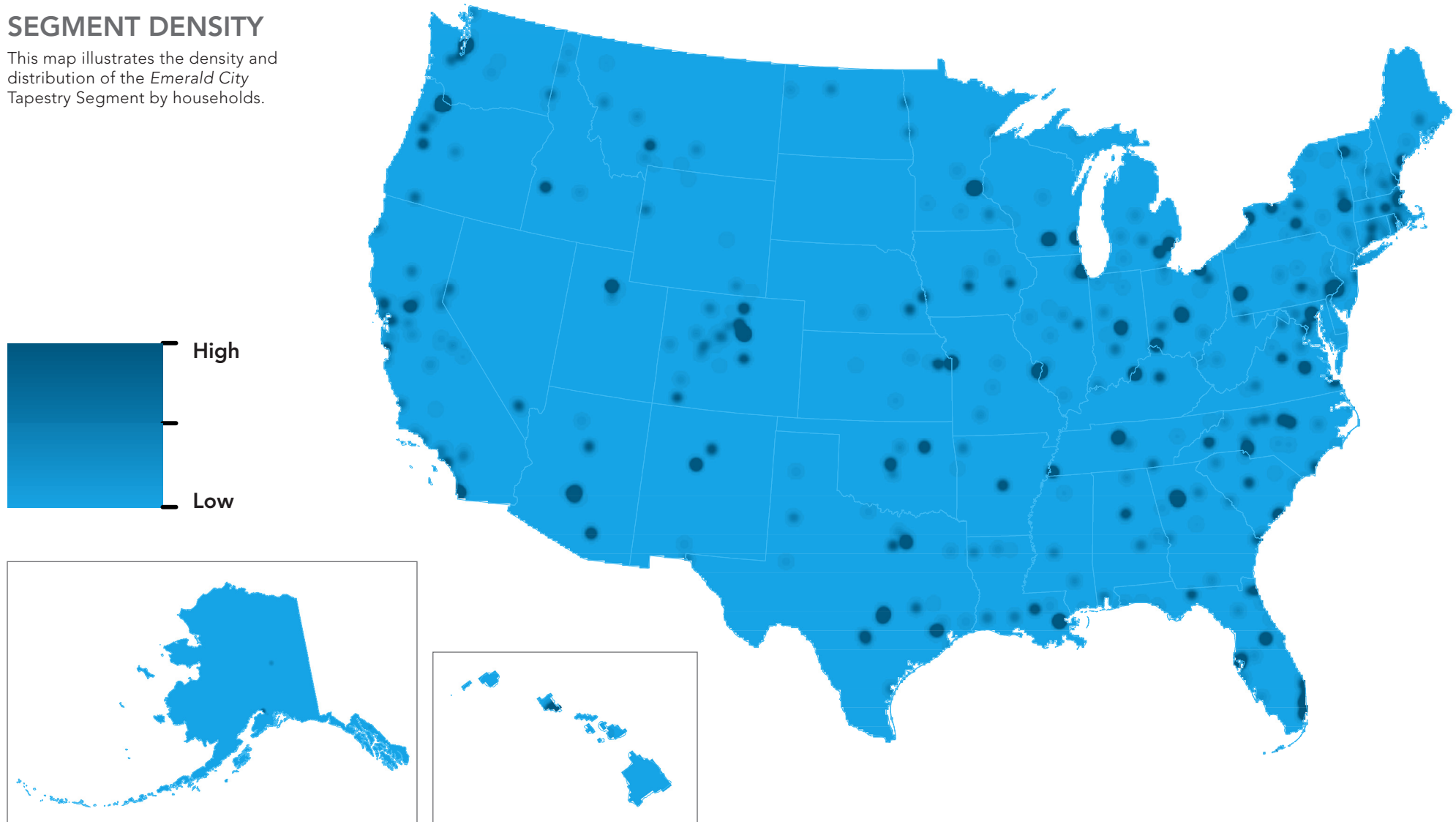
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the *Emerald City* Tapestry Segment by households.



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LifeMode Group: GenXurban

In Style

5B

Households: 2,764,500

Average Household Size: 2.35

Median Age: 42.0

Median Household Income: \$73,000

WHO ARE WE?

In Style denizens embrace an urbane lifestyle that includes support of the arts, travel, and extensive reading. They are connected and make full use of the advantages of mobile devices. Professional couples or single households without children, they have the time to focus on their homes and their interests. The population is slightly older and already planning for their retirement.

OUR NEIGHBORHOOD

- City dwellers of large metropolitan areas.
- Married couples, primarily with no children (Index 112) or single households (Index 109); average household size at 2.35.
- Home ownership average at 68% (Index 108); nearly half, 47%, mortgaged (Index 114).
- Primarily single-family homes, in older neighborhoods (built before 1980), with a mix of town homes (Index 132) and smaller (5–19 units) apartment buildings (Index 110).
- Median home value at \$243,900.
- Vacant housing units at 8.6%.

SOCIOECONOMIC TRAITS

- College educated: 48% are graduates (Index 155); 77% with some college education.
- Higher labor force participation rate is at 67% (Index 108) with proportionately more 2-worker households (Index 110).
- Median household income of \$73,000 reveals an affluent market with income supplemented by investments (Index 142) and a substantial net worth (Index 178).
- Connected and knowledgeable, they carry smartphones and use many of the features.
- Attentive to price, they use coupons, especially mobile coupons.



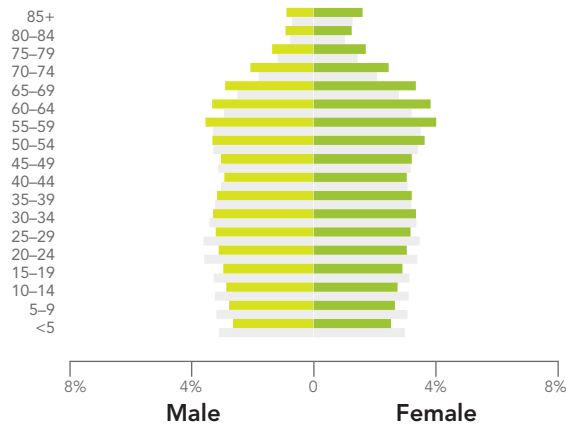
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by MRI-Simmons.



AGE BY SEX (Esri data)

Median Age: **42.0** US: 38.2

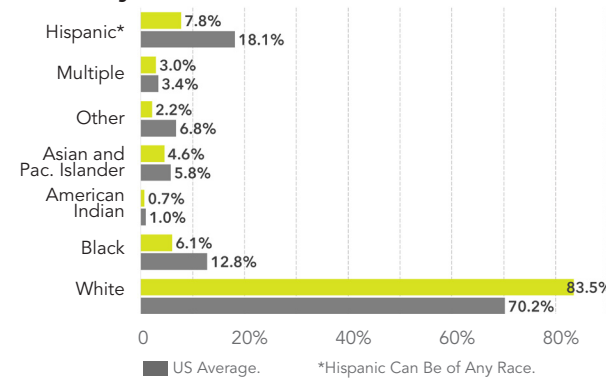
■ Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **39.8** US: 64.0



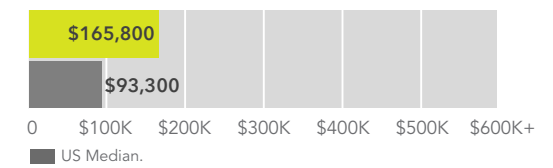
INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

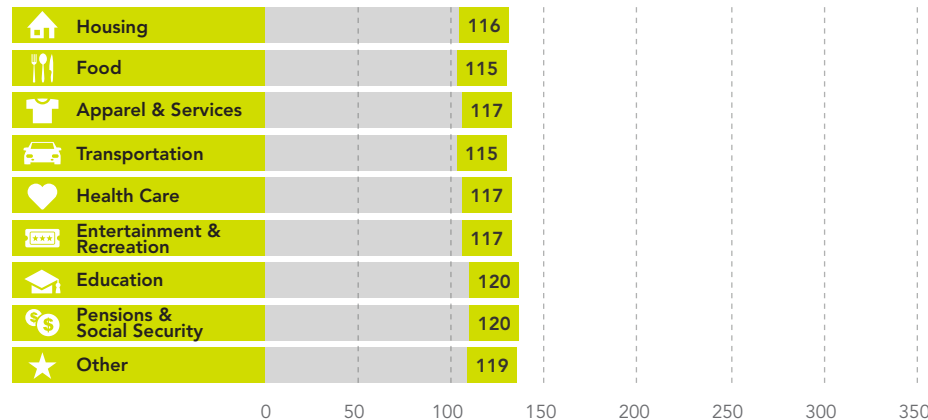


Median Net Worth



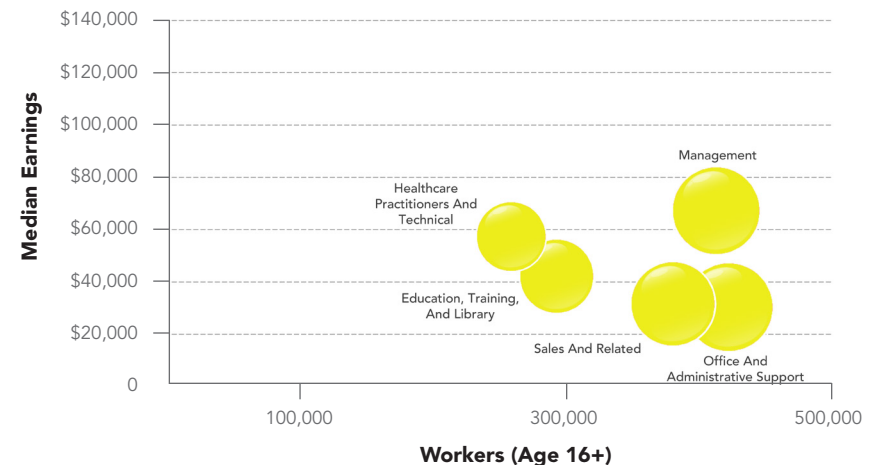
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- Partial to late model SUVs: compact SUVs are gaining popularity.
- Homes integral part of their style; invest in home remodeling/maintenance, DIY or contractors; housekeeping hired.
- Prefer organic foods, including growing their own vegetables.
- Financially active, own a variety of investments often managed by a financial planner.
- Meticulous planners, both well insured and well invested in retirement savings.
- Generous with support of various charities and causes.
- Actively support the arts, theater, concerts, and museums.

HOUSING

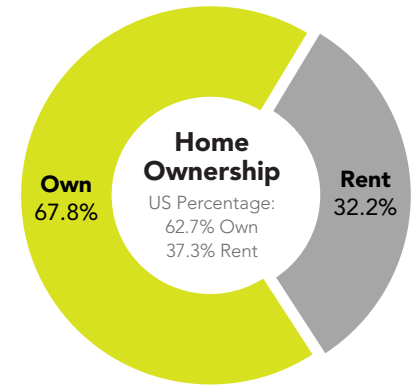
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

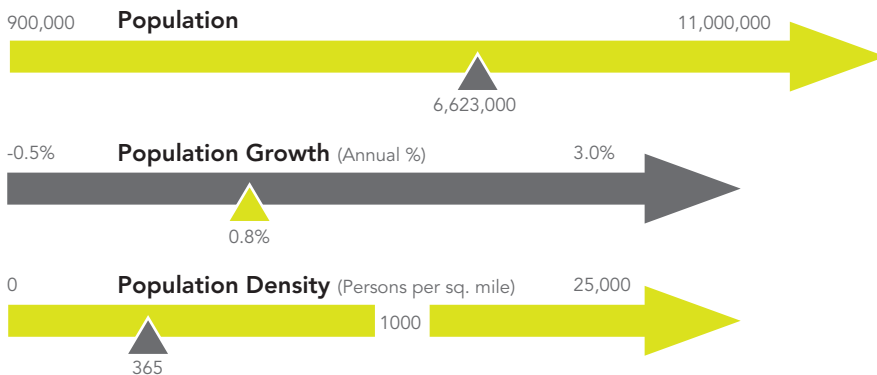
Median Value:
\$243,900

US Median: \$207,300



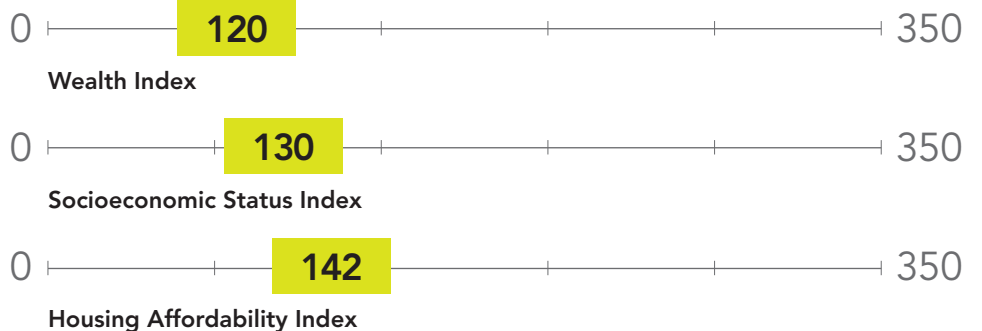
POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

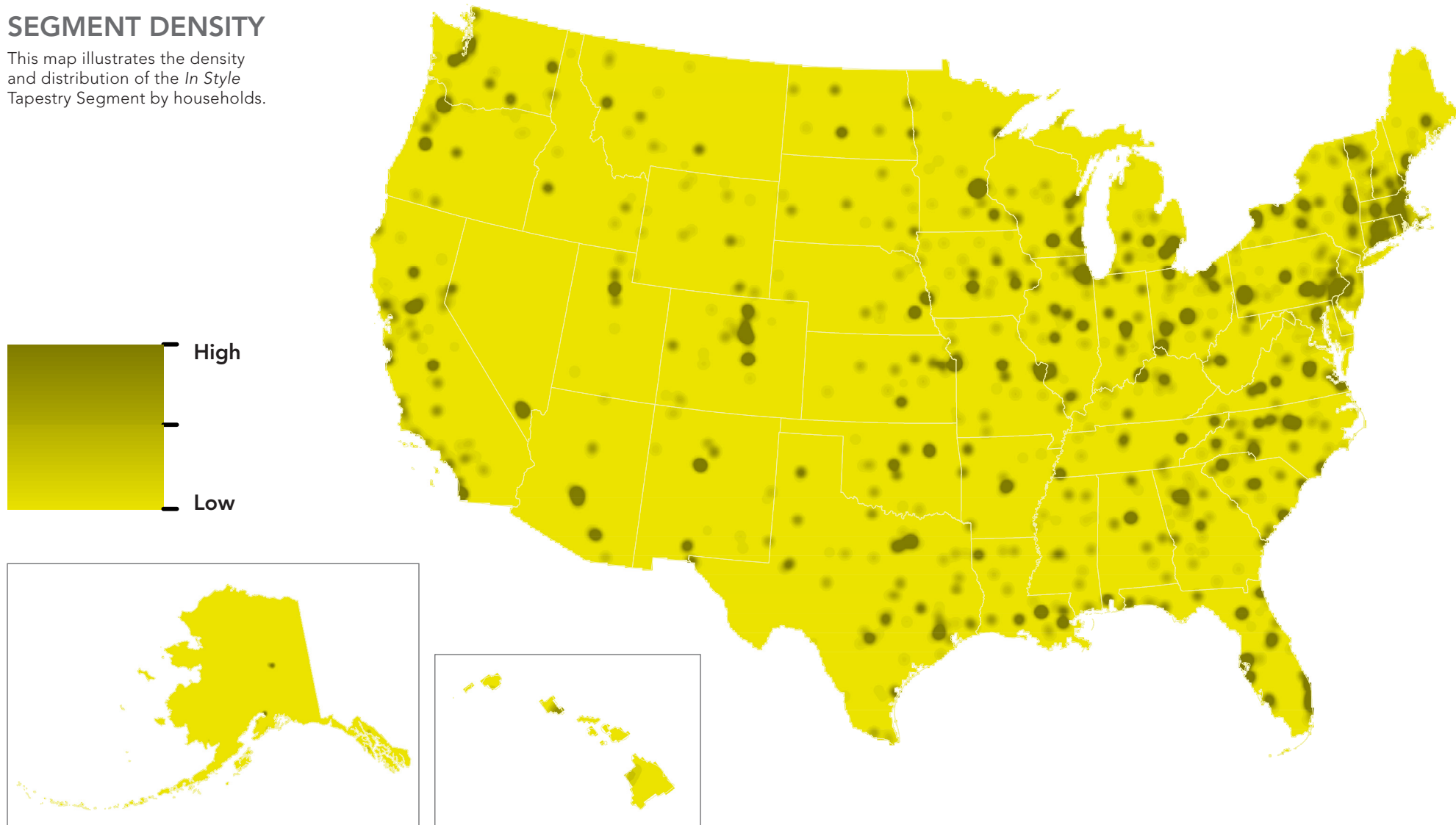
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the *In Style* Tapestry Segment by households.



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LifeMode Group: Upscale Avenues

Enterprising Professionals



Households: 1,737,200

Average Household Size: 2.48

Median Age: 35.3

Median Household Income: \$86,600

WHO ARE WE?

Enterprising Professionals residents are well educated and climbing the ladder in STEM (science, technology, engineering, and mathematics) occupations. They change jobs often and therefore choose to live in condos, town homes, or apartments; many still rent their homes. The market is fast-growing, located in lower density diverse neighborhoods of large metro areas. This young market makes over one and a half times more income than the US median, supplementing their income with investments. At home, they enjoy the Internet and TV on high-speed connections with premier channels and services.

OUR NEIGHBORHOOD

- Almost half of households are married couples, and 29% are single person households.
- Housing is a mixture of suburban single-family homes, row homes, and larger multiunit structures.
- Close to three quarters of the homes were built after 1980; 25% are newer, built after 2000.
- Renters make up nearly half of all households.

SOCIOECONOMIC TRAITS

- Median household income one and a half times that of the US.
- Over half hold a bachelor's degree or higher.
- Early adopters of new technology in hopes of impressing peers with new gadgets.
- Enjoy talking about and giving advice on technology.
- Use smartphones for news, accessing search engines, and maps.
- Work long hours in front of a computer.
- Strive to stay youthful and healthy, eat organic and natural foods, run and do yoga.
- Buy name brands and trendy clothes online.



Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by MRI-Simmons.



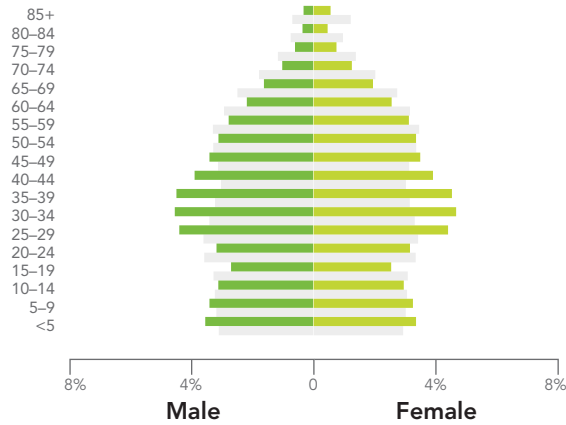
Enterprising Professionals



AGE BY SEX (Esri data)

Median Age: **35.3** US: 38.2

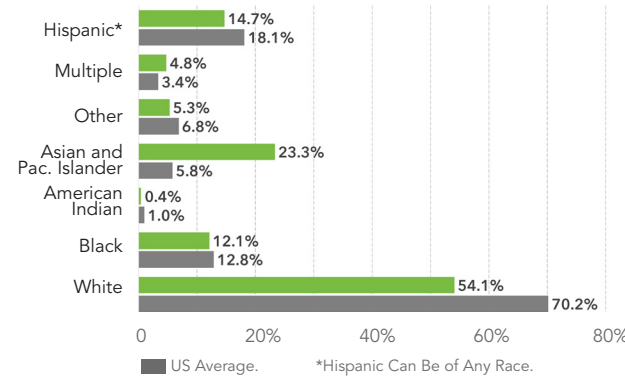
■ Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **73.0** US: 64.0



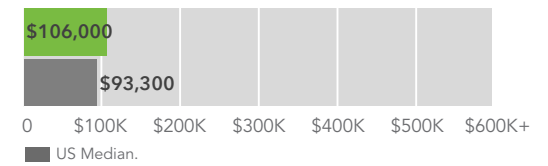
INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

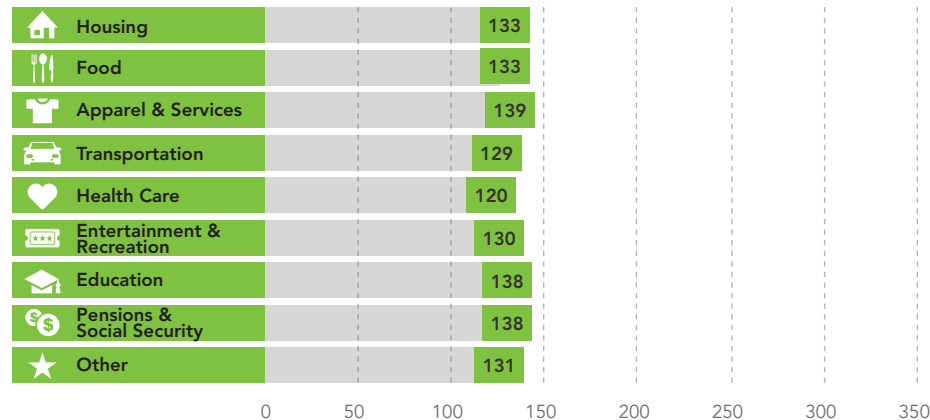


Median Net Worth



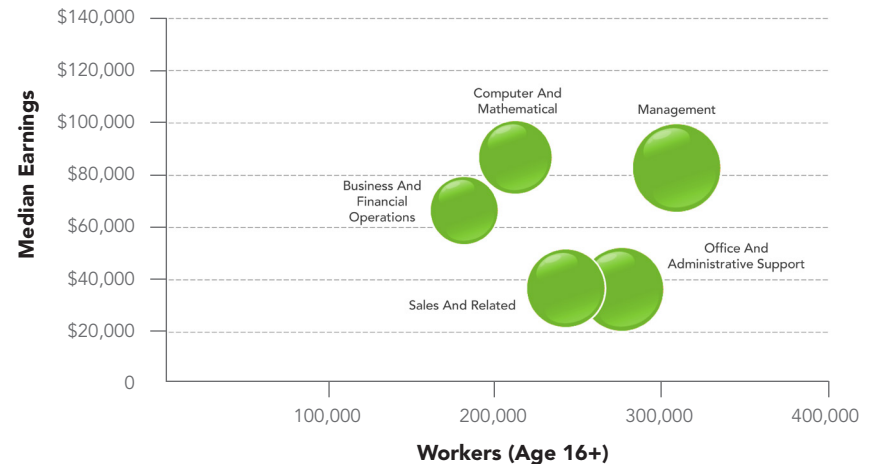
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- Buy digital books for tablet reading, along with magazines and newspapers.
- Frequent the dry cleaner.
- Travel to foreign and domestic destinations common.
- Watch movies and TV with video-on-demand and HDTV over a high-speed connection.
- Convenience is key—shop at Amazon.com and pick up medicines at the Target pharmacy.
- Eat out at The Cheesecake Factory, Chipotle Mexican, and Panera Bread; drop by Starbucks for coffee.
- Leisure activities include trips to museums and the beach.
- Have health insurance and a 401(k) through work.

HOUSING

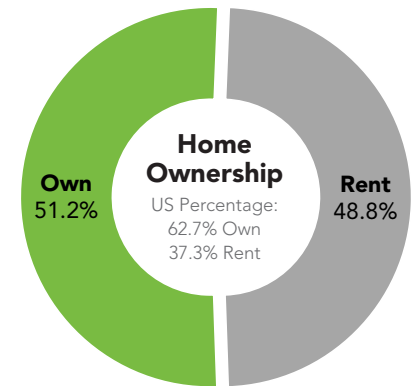
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Multiunits;
Single Family

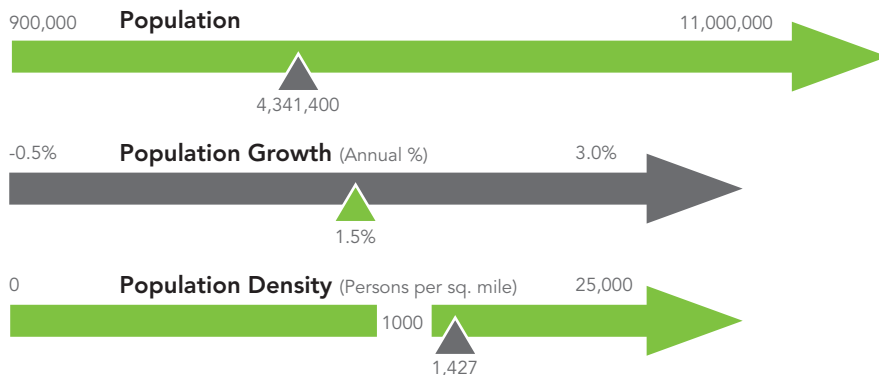
Median Value:
\$340,200

US Median: \$207,300



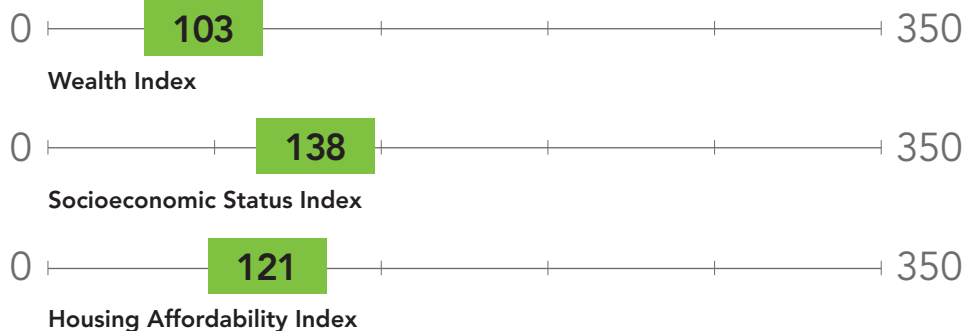
POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





LifeMode Group: Upscale Avenues

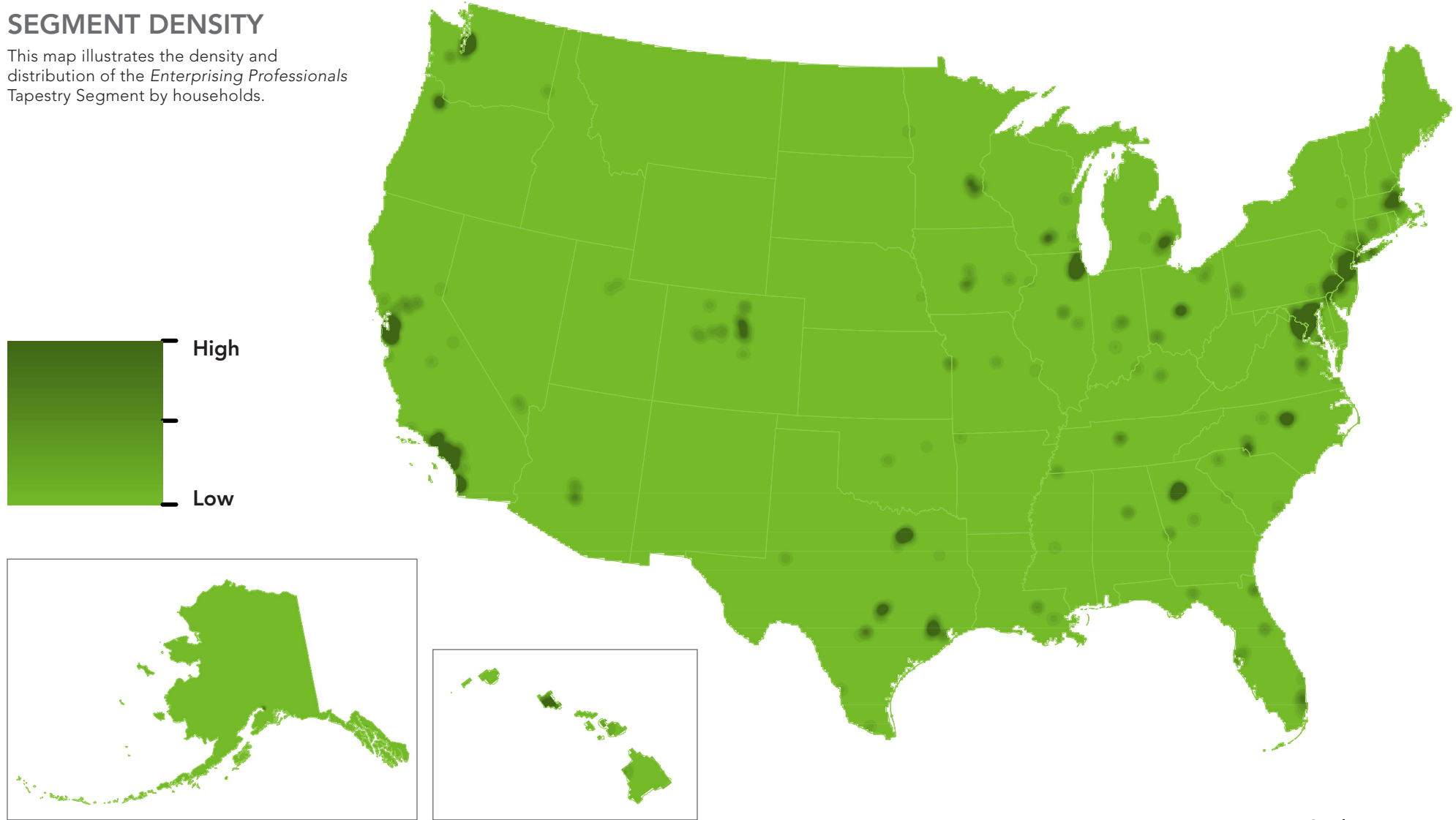
Enterprising Professionals



TAPESTRY
SEGMENTATION
esri.com/tapestry

SEGMENT DENSITY

This map illustrates the density and distribution of the *Enterprising Professionals* Tapestry Segment by households.



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THE
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LifeMode Group: Affluent Estates

Boomburbs



Households: 2,004,400

Average Household Size: 3.25

Median Age: 34.0

Median Household Income: \$113,400

WHO ARE WE?

This is the new growth market, with a profile similar to the original: young professionals with families that have opted to trade up to the newest housing in the suburbs. The original *Boomburbs* neighborhoods began growing in the 1990s and continued through the peak of the housing boom. Most of those neighborhoods are fully developed now. This is an affluent market but with a higher proportion of mortgages. Rapid growth still distinguishes the *Boomburbs* neighborhoods, although the boom is more subdued now than it was 10 years ago. So is the housing market. Residents are well-educated professionals with a running start on prosperity.

OUR NEIGHBORHOOD

- Growth markets are in the suburban periphery of large metropolitan areas.
- Young families are married with children (Index 220); average household size is 3.25.
- Home ownership is 84% (Index 134), with the highest rate of mortgages, 71.5% (Index 173).
- Primarily single-family homes, in new neighborhoods, 66% built since 2000 (Index 441).
- Median home value is \$350,000 (Index 169).
- Lower housing vacancy rate at 3.7%.
- The cost of affordable new housing comes at the expense of one of the longest commutes to work, over 30 minutes average, including a disproportionate number (33.6%) commuting across county lines (Index 141).

SOCIOECONOMIC TRAITS

- Well educated young professionals, 55% are college graduates (Index 178).
- High labor force participation at 71.3% (Index 114); most households have more than two workers (Index 124).
- Longer commute times from the suburban growth corridors have created more home workers (Index 156).
- Well connected, own the latest devices and understand how to use them efficiently; biggest complaints—too many devices and too many intrusions on personal time.
- Financial planning is well under way for these professionals.



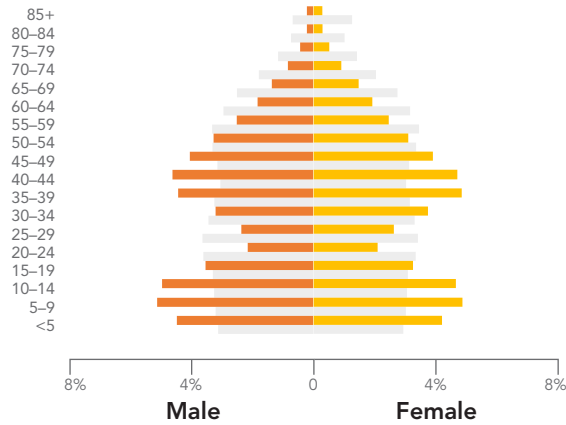
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by MRI-Simmons.



AGE BY SEX (Esri data)

Median Age: **34.0** US: 38.2

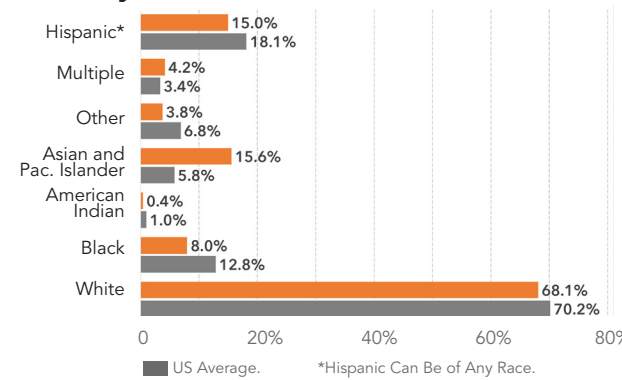
■ Indicates US



RACE AND ETHNICITY (Esri data)

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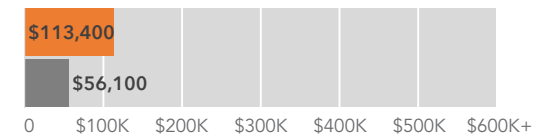
Diversity Index: **63.2** US: 64.0



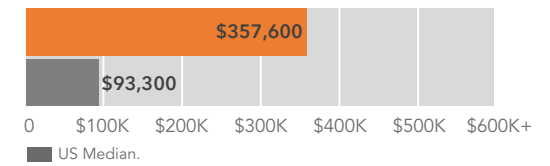
INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

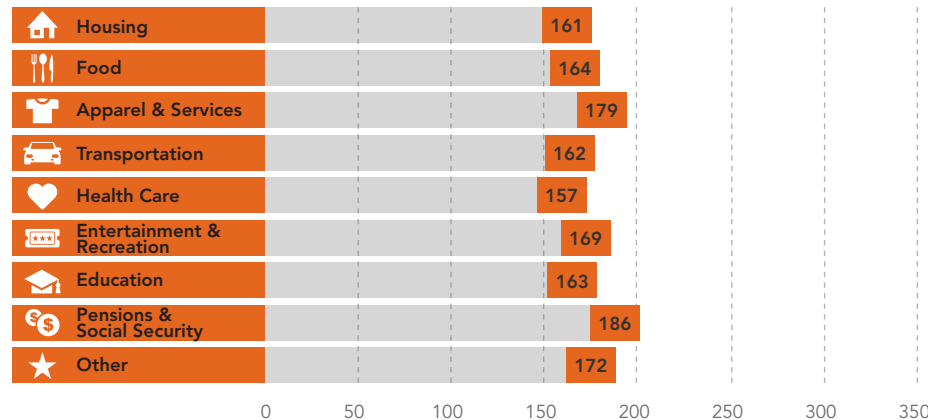


Median Net Worth



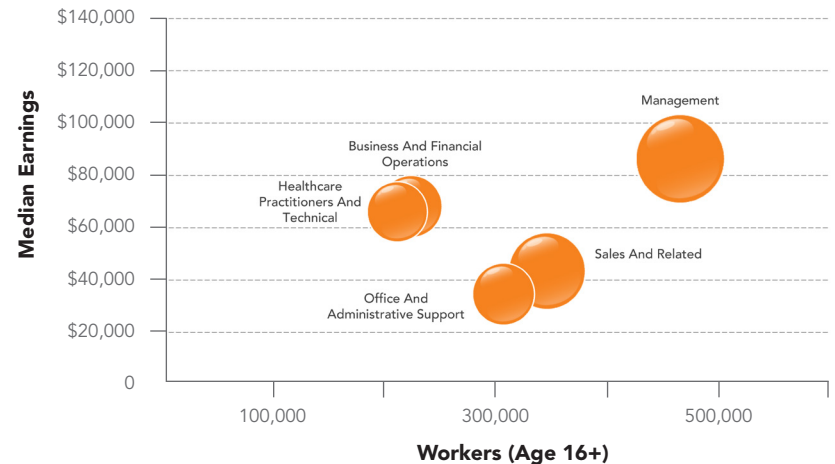
AVERAGE HOUSEHOLD BUDGET INDEX

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OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- *Boomburbs* residents prefer late model imports, primarily SUVs, and also luxury cars and minivans.
- This is one of the top markets for the latest in technology, from smartphones to tablets to Internet connectable televisions.
- Style matters in the *Boomburbs*, from personal appearance to their homes. These consumers are still furnishing their new homes and already remodeling.
- Enjoy gardening but more often contract for home services.
- Physical fitness is a priority, including club memberships and home equipment.
- Leisure includes a range of activities from sports (hiking, bicycling, swimming, golf) to visits to theme parks or water parks.
- Residents are generous supporters of charitable organizations.

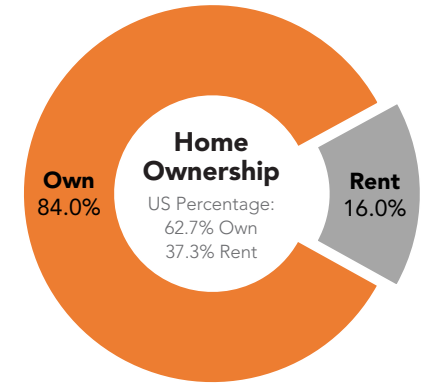
HOUSING

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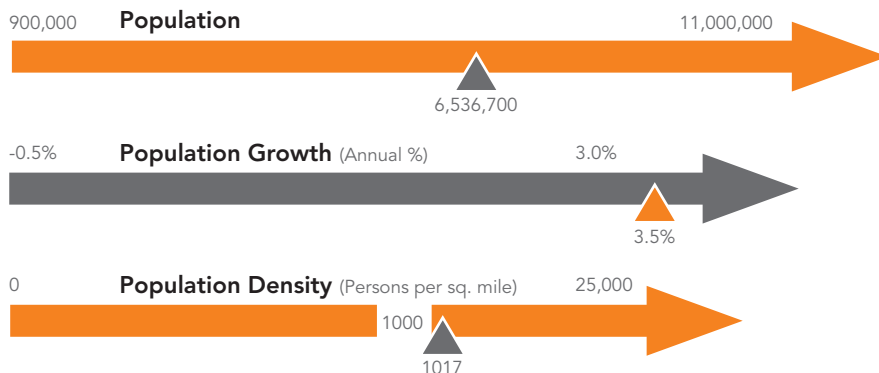
Typical Housing:
Single Family

Median Value:
\$350,000
US Median: \$207,300



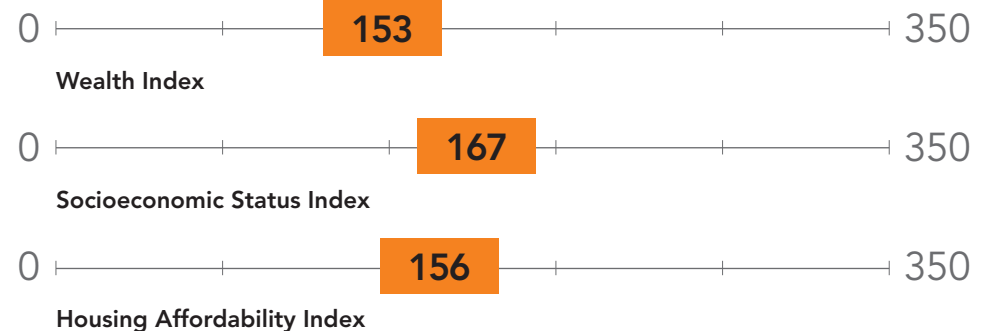
POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

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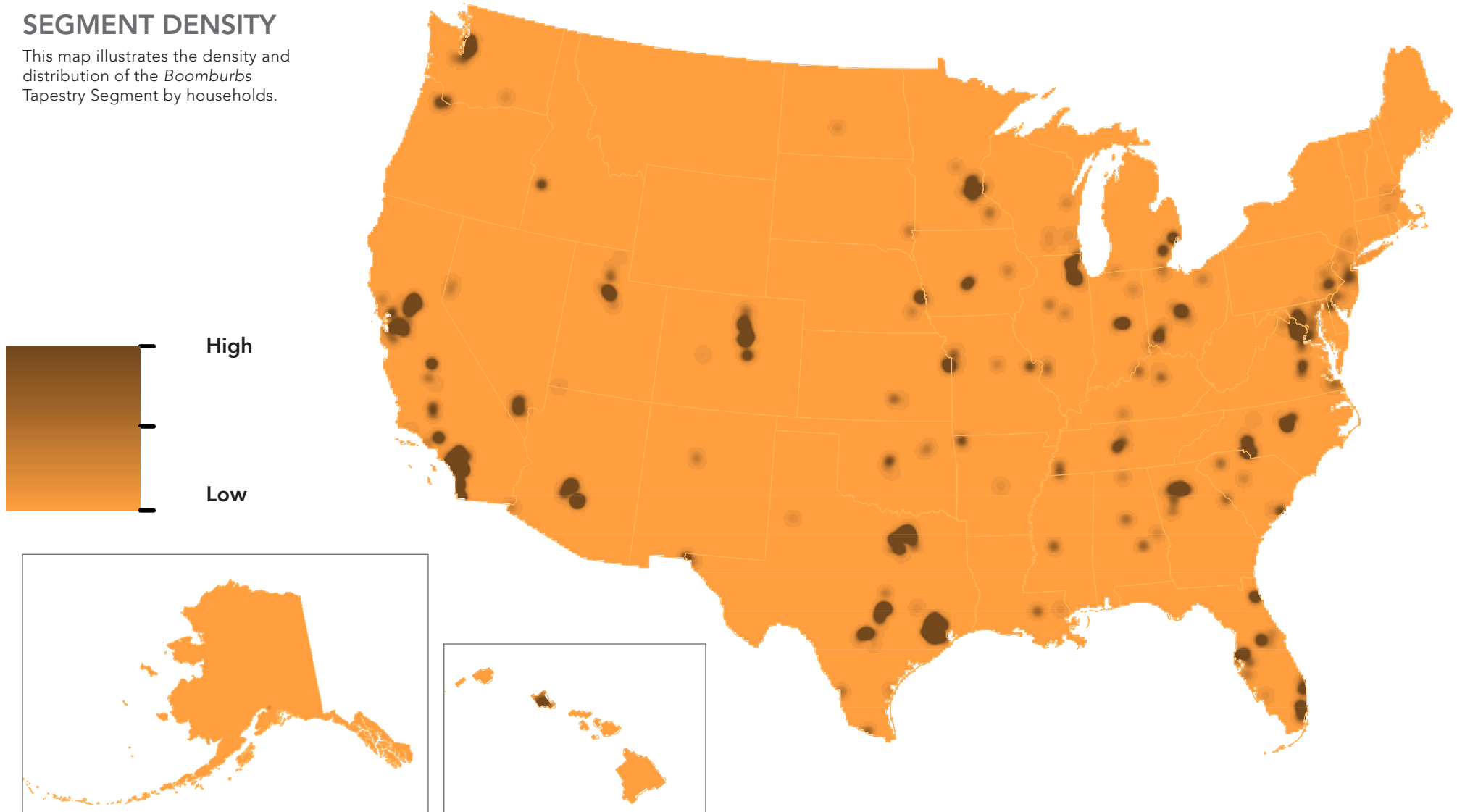


Boomburbs



SEGMENT DENSITY

This map illustrates the density and distribution of the *Boomburbs* Tapestry Segment by households.



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LifeMode Group: Midtown Singles

Young and Restless

11B

Households: 2,131,500

Average Household Size: 2.04

Median Age: 29.8

Median Household Income: \$40,500

WHO ARE WE?

Gen Y comes of age: Well-educated young workers, some of whom are still completing their education, are employed in professional/technical occupations, as well as sales and office/administrative support roles. These residents are not established yet, but striving to get ahead and improve themselves. This market ranks in the top 5 for renters, movers, college enrollment, and labor force participation rate. Almost 1 in 5 residents move each year. More than half of all householders are under the age of 35, the majority living alone or in shared nonfamily dwellings. Median household income is still below the US. Smartphones are a way of life, and they use the Internet extensively. *Young and Restless* consumers typically live in densely populated neighborhoods in large metropolitan areas; over 50% are located in the South (almost a fifth in Texas), with the rest chiefly in the West and Midwest.

OUR NEIGHBORHOOD

- One of the youngest markets: More than half the householders under age 35; median age 29.8.
- Primarily single-person households (Index 163) with some shared households (Index 201).
- Highly mobile market, beginning careers and changing addresses frequently.
- One of the top 5 renter markets (Index 233).
- Apartment rentals popular: 44% in 5–19 unit buildings (Index 487), 27% in 20+ unit buildings (Index 318).
- Majority of housing built in 1970 or later (84%).

SOCIOECONOMIC TRAITS

- Education completed: More than 2 out of 3 have some college, an associate's degree, or a bachelor's degree or higher. Almost 14% are still enrolled in college (Index 175).
- Labor force participation rate is exceptionally high at 75.0%.
- These careful shoppers are aware of prices, and demonstrate little brand loyalty.
- Like to be the first to try new products, but prefer to do research before buying the latest electronics.
- Most of their information comes from the Internet and TV, rather than traditional media.
- Carry their cell phone everywhere they go.



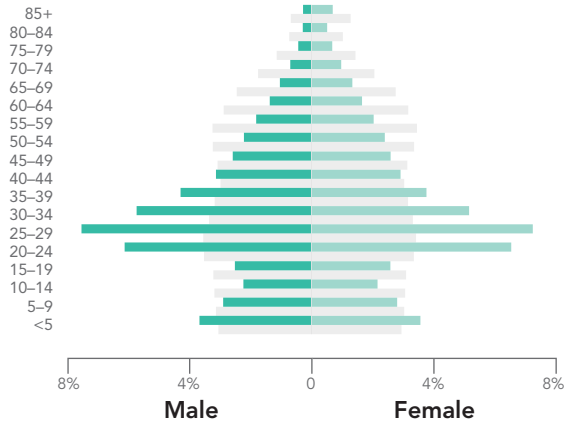
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by MRI-Simmons.



AGE BY SEX (Esri data)

Median Age: **29.8** US: 38.2

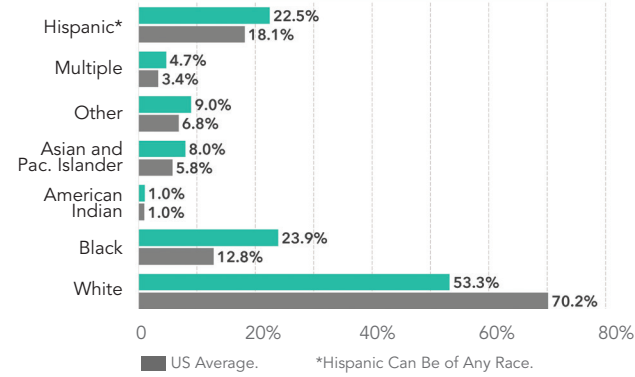
■ Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **77.4** US: 64.0



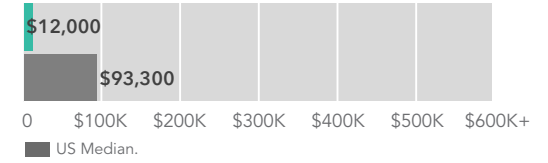
INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

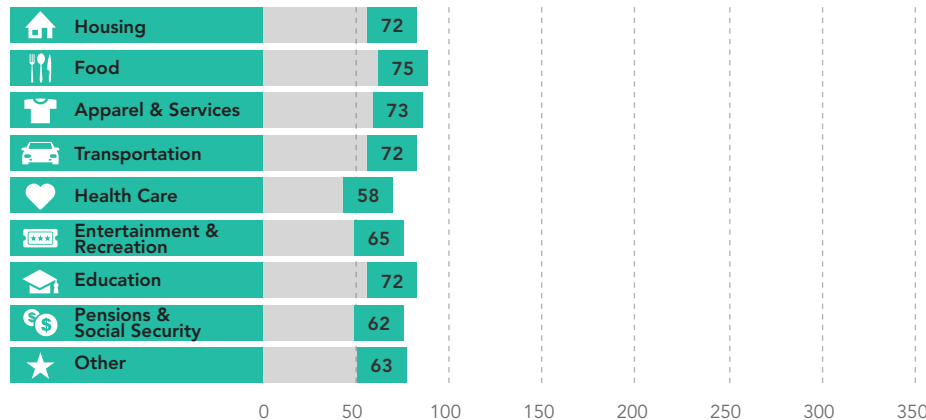


Median Net Worth



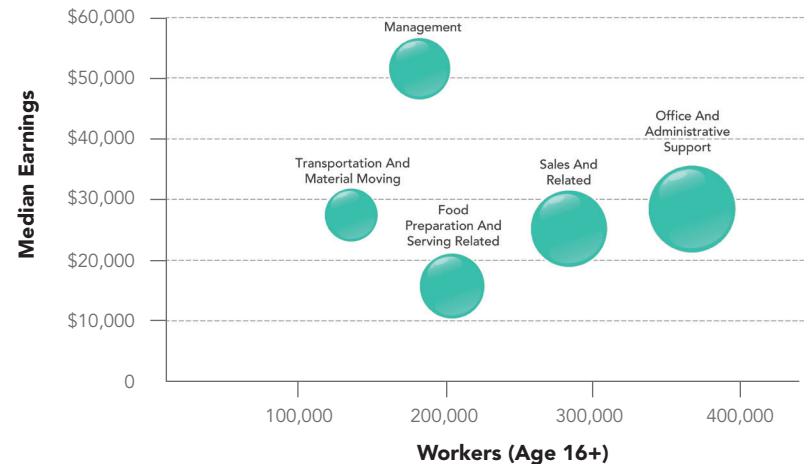
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- No landline telephone for majority of HHs, preferring a cell phone only.
- Use their cell phone to text, listen to music, pay bills, redeem coupons, look up directions, and access financial information.
- Online activities include banking (with paperless statements), purchasing items on eBay, accessing Twitter and Facebook, and watching movies and TV shows.
- Enjoy dancing, playing pool, watching VH1 and Comedy Central programs, and playing basketball and ping pong.
- Listen to contemporary hits, jazz, rap, hip hop, and dance music.
- Purchase natural/organic food, but frequent fast food restaurants.
- Residents like to read magazines, especially digital, covering topics ranging from news, fashion, to music.

HOUSING

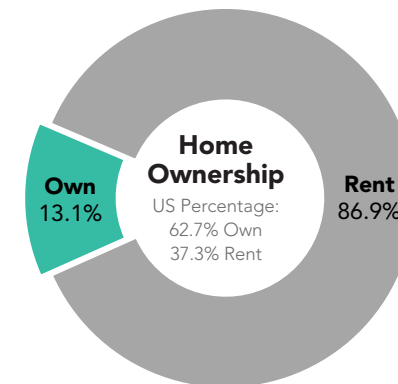
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Multi-Unit Rentals

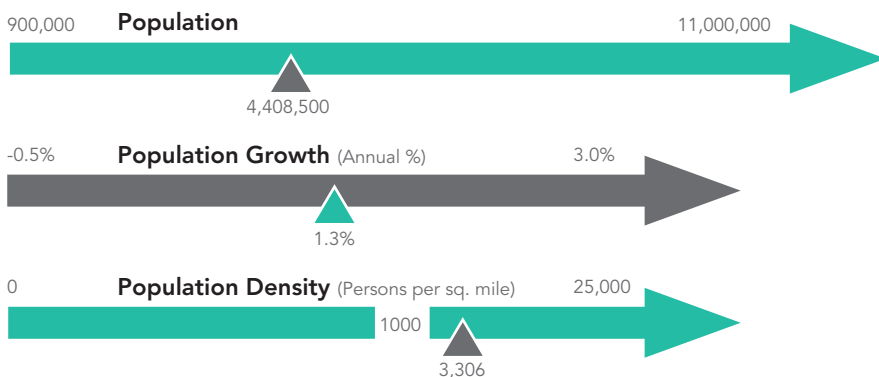
Average Rent:
\$958

US Average: \$1,038



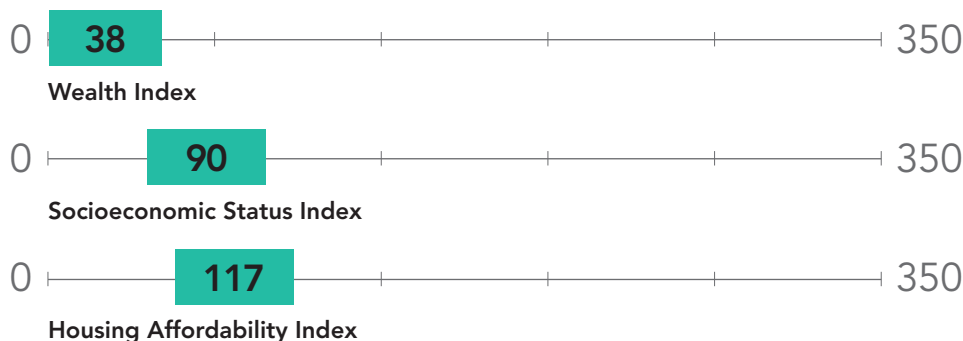
POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.



11B

LifeMode Group: Midtown Singles

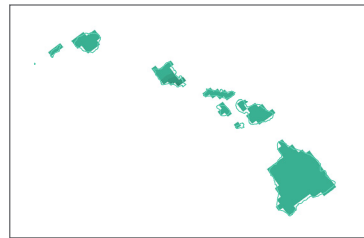
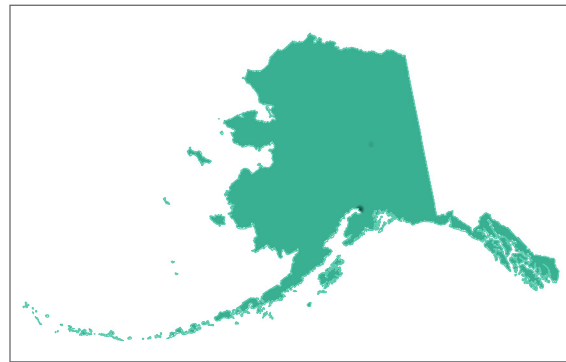
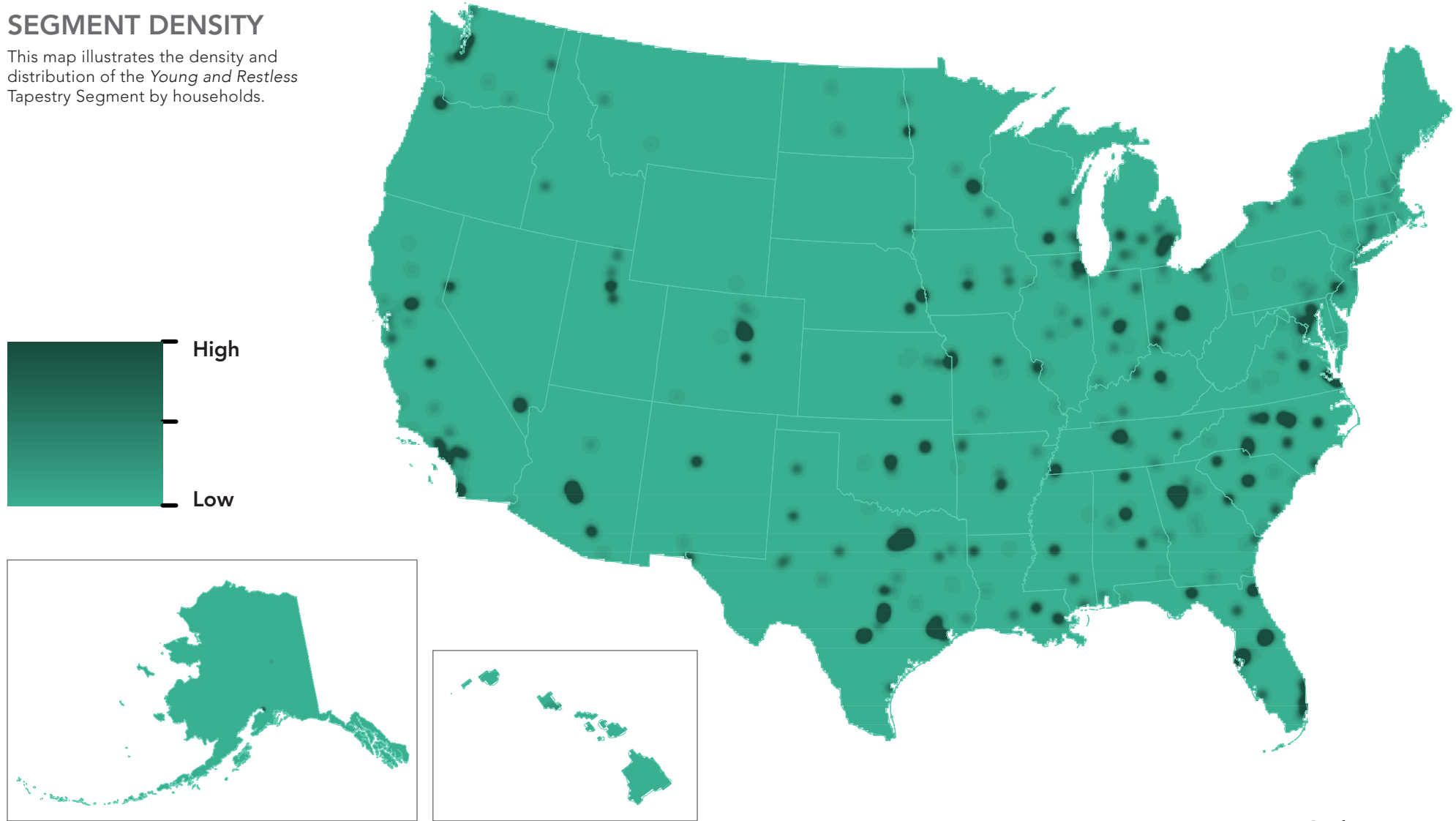
Young and Restless



TAPESTRY
SEGMENTATION
esri.com/tapestry

SEGMENT DENSITY

This map illustrates the density and distribution of the *Young and Restless* Tapestry Segment by households.



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