

LEADERSLISTEN



HOUSING SURVEY

ACTIONABLE INSIGHTS

Introduction

The Leaders Listen Series is a set of short surveys produced by MORPC that periodically invites Central Ohio residents to share their preferences and experiences with regional planners and decision makers. The Leaders Listen: Housing survey invited residents to voice their opinion on housing-related topics, including home preferences, affordability, and modes of commuting.

More than 1,950 survey respondents across our 15-county region provided insights on a range of issues from desired improvements to their current housing conditions, key housing policy priorities, and the value of the proposed LinkUS transit and mobility initiative. Developed in partnership with Measurement Resources Company and The Columbus Dispatch, the survey captured pressing concerns for area residents.

Actionable Insights

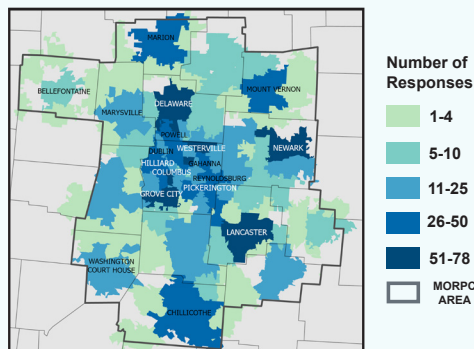
- Almost half of respondents (48%) indicated that they cannot find housing that both meets their needs and can afford while only 38% said that they can find suitable housing
- Over half of Central Ohio respondents have had to miss or sacrifice payments for necessities to pay their rent or mortgage (55%)
- Attainable housing for low- and middle-income households and more walkable neighborhoods are the top two investment priorities

Top Changes that would meet respondents housing needs:

- 57% of renters want to own instead of rent their housing unit (accounting for over 1/3 of all respondents)
- 30% of all respondents want improved home quality
- 29% of all respondents want a larger home

Leaders Listen

HOUSING SURVEY RESPONDENTS



Survey Response Count by ZIP Codes

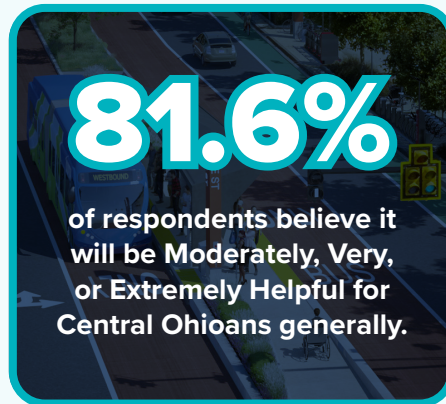
Housing Needs

As the region experiences population growth, it's crucial to ensure that affordable housing is accessible to all residents regardless of socio-economic status or stage of life. To chart the best path forward, we must closely listen to our communities.

Through the Leaders Listen initiative, we have learned that when it comes to housing issues and priorities, there is strong agreement that: 1) there is difficulty in finding housing which meets residents' needs that they can afford; 2) LinkUS would provide significant benefits to residents; and 3) many current renters who could have purchased their own home under previous market conditions, now find that costs are a barrier. Moreover, our survey revealed a troubling trend: a significant percentage of households report having to sacrifice, or delay or miss payments for essential needs to afford their rent or mortgage.

Public View on LinkUS

How helpful do you believe LinkUS will be for Central Ohioans generally?



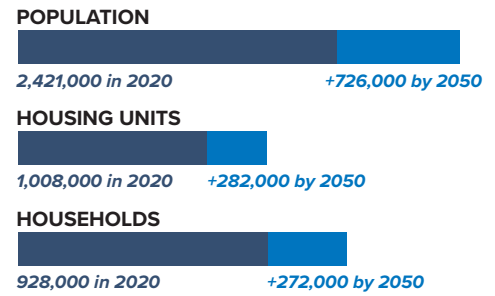
Growth Context

As we envision Central Ohio's future, we recognize numerous opportunities to better meet the wants and needs of residents. Collectively, we should focus on implementing a diverse range of strategies and policies that encourage the development of housing attainable for low- and middle-income residents. We must strategically manage growth and development while preserving existing housing and fostering a sense of community.

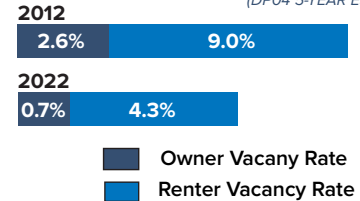
From 2020 to 2050 the region will grow to 1.2 million households, in which case 282,000 new housing units must be constructed over that period just to maintain the current status quo. To restore housing inventory to a healthier level such as we had back in 2012 an additional 55,000 units would be necessary, raising the total need to 337,000 new units over the same period.

Projected Growth

Population, Housing Units, Households 2020 to 2050

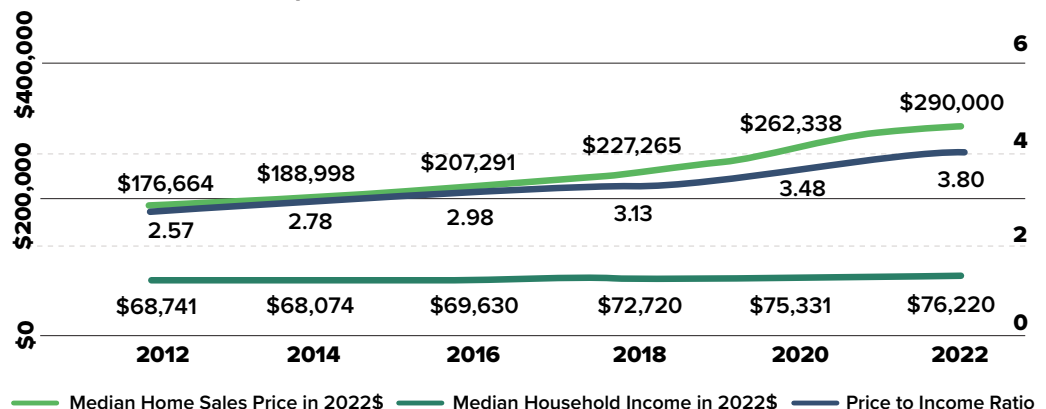


Percent of Available Housing Units that are Vacant: MORPC 15-County (DPO4 5-YEAR EST)



Home Sale Prices Outpace Income in Central Ohio

Central Ohio MLS Median Home Sales Price (2022\$) Compared to Median Household Income (2022\$)



Resident Experiences

Household personas were developed to describe common experiences of distinct groups using key variables such as age, home ownership, and household income. Notably, significant differences were attributable to respondents' age, home ownership status and most impactfully, household income. Responses by race within the same household income levels and housing situation were more similar.



The Young Household (Aspiring Homeowners)

This group comprises respondents under the age of 35 who are non-homeowners and largely earn less than \$35,000 annually. The "Youngs" are characterized as a younger, newly, or soon-to-be coupled household starting their careers & Families. As they are not yet financially secure, the Youngs are renters, but aspire to own their own home.



The Chase Household (Achievers)

Mid-career individuals aged 35 to 55 make up the Chase household. They are mostly homeowners with a household income exceeding \$100,000. Financially secure, they have one or more children and are actively chasing their life goals.



The Nester Household (Settled Nesters)

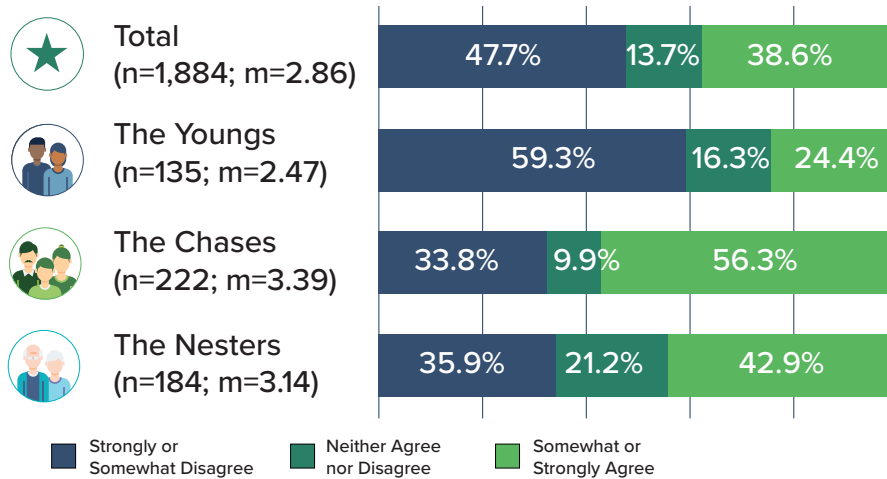
Representing the late career and retirement age cohort, the "Nester" household lives on stable or fixed incomes between \$35,000 and \$100,000. They reside in their own homes and are empty nesters, with their children now living independently.

	Ages	Owner	Household Income	Living with Children	Veteran	Racial Minority
Youngs	18 to 34	17.6%	Less than \$35,000	33.6%	1.5%	32.1%
Chases	35 to 54	91.9%	More than \$100,000	66.1%	5.8%	13.5%
Nesters	55 and over	78.5%	\$35,000 to \$100,000	4.6%	20.6%	6.6%

Impacts

The strategies communities employ to meet current and future housing needs will greatly influence the housing experiences of residents, and shape regional and local development landscapes.

I can find housing in Central Ohio which meets my needs and that I can afford.



Housing

Central Ohio residents consistently voiced concerns about the unavailability of housing that aligns with their needs. Building housing that is affordable for low- and middle-income households emerged as the top priority for regional investments across all responses. Our area's very low vacancy rates suggest availability is a challenge for renters and prospective homebuyers alike.

Transit & Active Mobility

Central Ohio residents rank walkable neighborhoods as the second highest investment priority for the region. Concurrently, there's widespread optimism regarding the benefits of the proposed LinkUS transit and mobility initiative. Upon implementation, LinkUS is expected to reduce traffic congestion while fostering a more walkable and bike friendly region. This integrated approach will better connect communities and reduce vehicle emissions.

Equity & Inclusion

Planning initiatives increasingly focus on how best to support equitable development and enhance the options for available services. To do this, it is important that all residents can afford stable housing in locations that have the services required to their households to thrive. Respondents of all races in low- and middle-income households shared that today's housing market does not include enough housing options for them.

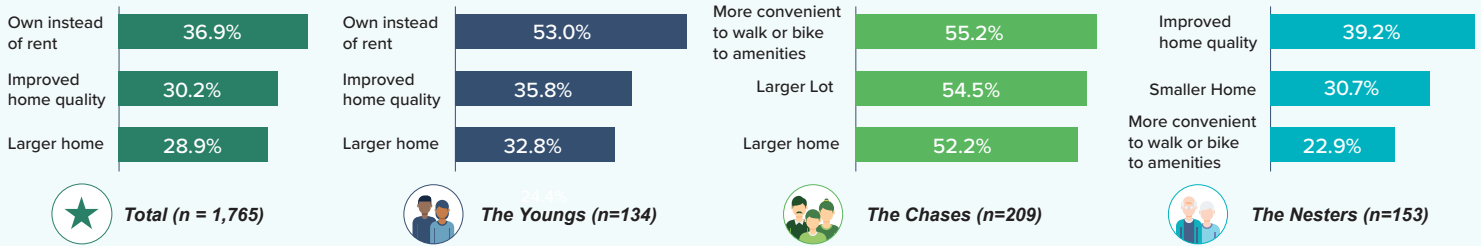
Sustainability

Area residents value more walkable and bikeable neighborhoods and prioritize the protection and preservation of existing greenspaces within our communities. Denser housing developments would reduce urban sprawl and limit greenfield consumption. In addition to convenience, focusing on infill and compact design near existing housing and transit infrastructure significantly reduces pollution and greenhouse gas emissions, improving air quality by minimizing vehicle miles travelled.

Diverse Perspective

Across various household income levels, those with lower incomes are half as likely to agree that they can find affordable housing that meets their needs as compared to those with higher incomes. However, irrespective of income, a majority of respondents expressed either “Not at all” or only “Somewhat” satisfied with how local decision makers are addressing the Central Ohio region’s housing and transportation needs.

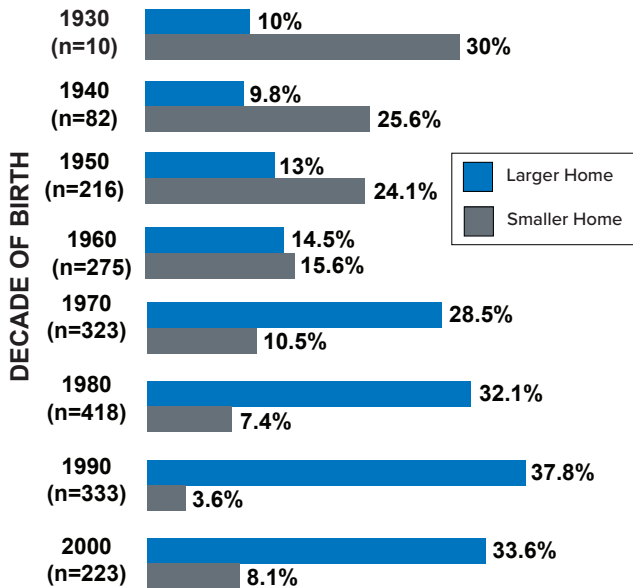
Assuming the cost of housing was not a barrier, which of the following changes would better meet your housing needs?



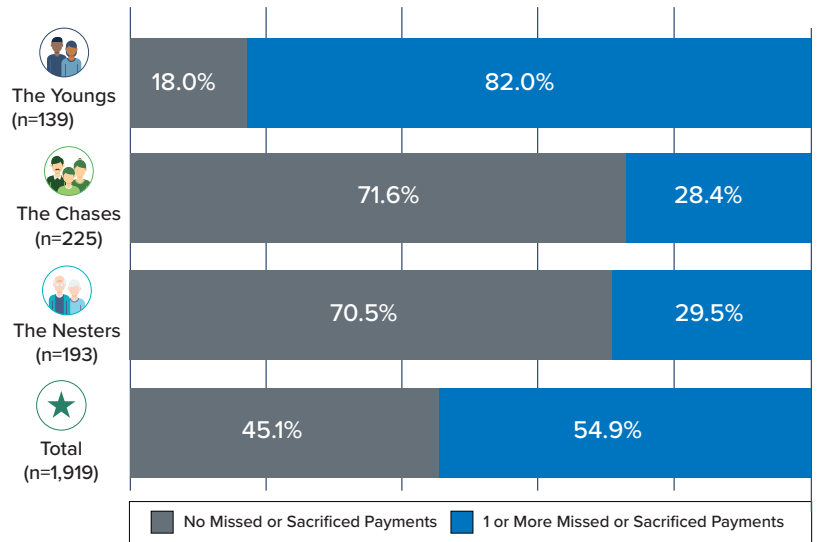
Housing Needs

The three household personas illustrate diverse experiences that influence their housing needs and preferences. The Youngs, predominantly non-homeowners, aspire to own homes, with better quality and more space. Meanwhile, the Chasers and Nesters differ slightly on priorities such as more convenient access to amenities. In contrast, while the Chasers are looking to upsize their homes, Nesters are increasingly interested in downsizing. This is further demonstrated when considering responses by decade of birth, which shows that as a respondent age increases, up to 1 out of 3 residents express a preference for a smaller home. Ownership remains a consistent preference among Central Ohioans, regardless of age or persona.

Older Adults Desire Smaller Homes; Younger Residents Look to Upsize



Residents sacrificing necessities to afford housing



Sacrificed or Missed Payments in Order to Afford Rent or Mortgage

Across all responses: (55% with sacrifices)

- Groceries, food, or general home supplies (30%)
- Shoes, clothing, coats, or appropriate work or school attire (26%)
- Repairing and replacing appliances, or home repairs (19%)

The Young Household: (82% with sacrifices)

- Groceries, food, or general home supplies (54%)
- Shoes, clothing, coats, or appropriate work or school attire (43%)
- Automobile payments, maintenance, repairs, or insurance (33%)

The Chases Household (28% with sacrifices)

- Repairing and replacing appliances, or home repairs (16%)
- Shoes, clothing, coats, or appropriate work or school attire (12%)
- Groceries, food, or general home supplies (11%)

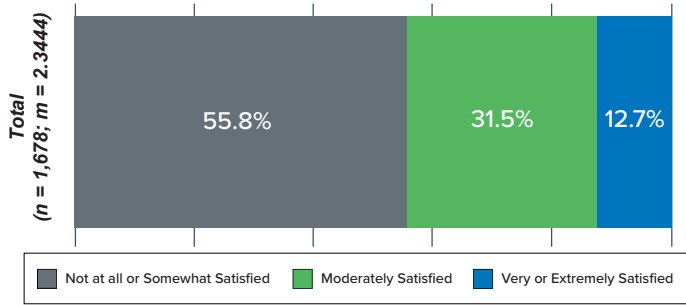
The Nester Household: (30% with sacrifices)

- Repairing and replacing appliances, or home repairs (16%)
- Groceries, food, or general home supplies (10%)
- 3a. Doctor visits, medical procedures, medical bills, or purchasing health insurance (9%)
- 3b. Shoes, clothing, coats, or appropriate work or school attire (9%)

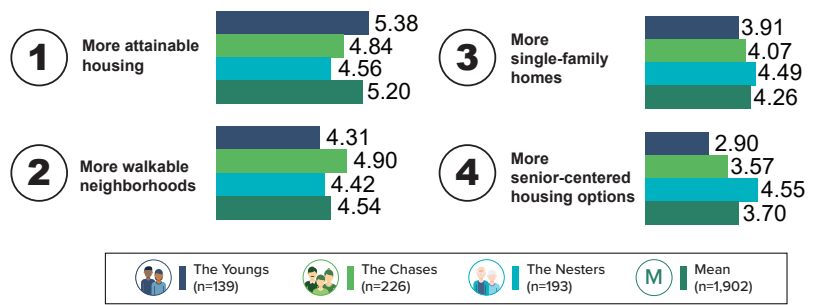
Deeper Dive

Unfortunately, more than half of respondents shared that they are “not at all” or only “somewhat” satisfied with planners and decision makers in Central Ohio in meeting their housing needs.

Overall, how satisfied are you that planners and other decision makers in Central Ohio are addressing your housing needs?

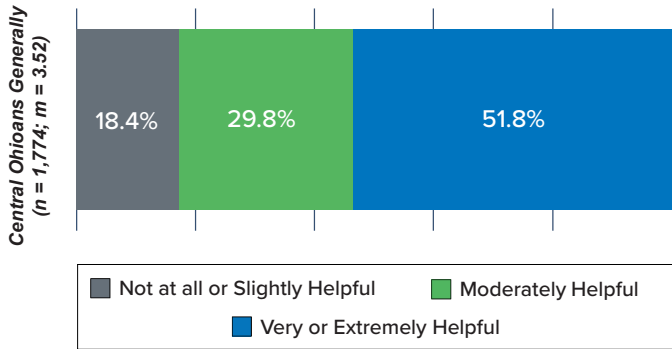


Which of the following investments in housing would you most like to see in the Central Ohio region?

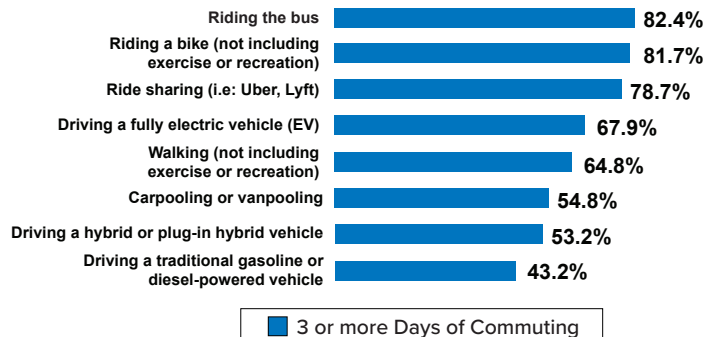


However, when it comes to LinkUS, a major proposal to improve transit, bikeways, and trails expanding walkability and access to transportation across the region, public opinion was positive. Individuals’ responses varied significantly depending on their commuting mode, with those commuting by bus, bike, or ride share being very supportive. While the majority believe LinkUS will benefit the region overall, younger residents are more likely to expect it to be moderately to extremely helpful for themselves personally. These findings underscore the importance of prioritizing community developments that integrate more housing for low- and middle-income households near transit hubs, while creating environments that are conducive to walking and biking to local amenities. Building higher density or on smaller lots, where feasible, can further enhance walkability and address resident preferences.

How helpful do you believe LinkUS will be for the following?



How helpful do you believe LinkUS will be for You Personally: Moderately to Extremely Helpful?



Housing Pressures in Central Ohio by County

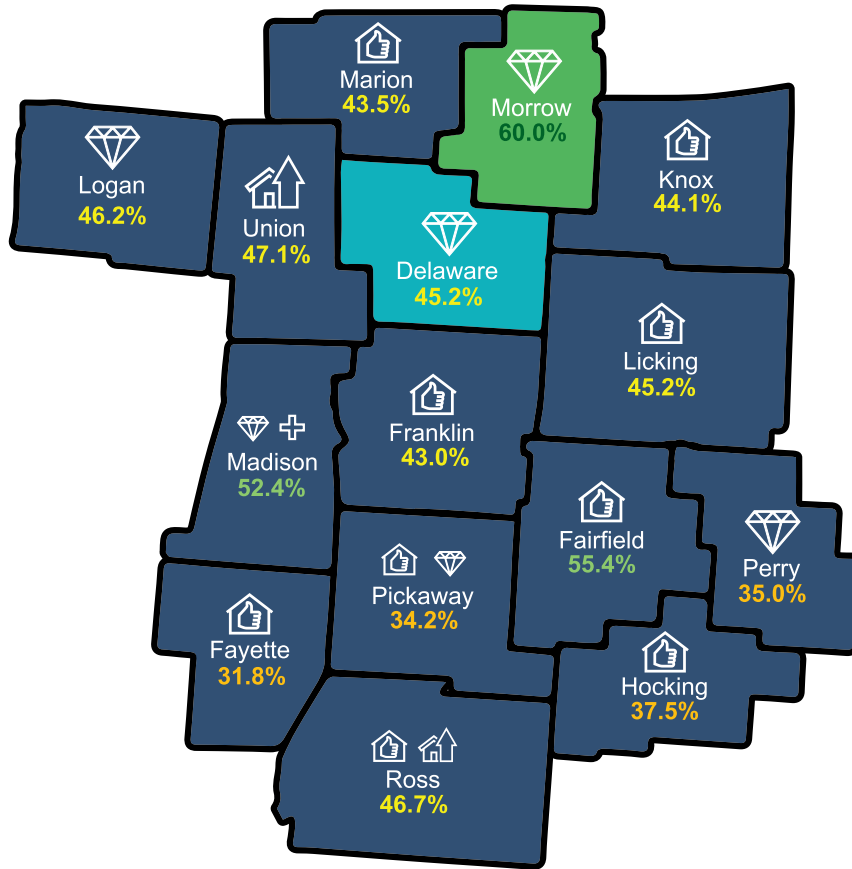
Central Ohio’s housing market conditions and trends vary from county to county. The table below shows declining availability and decreasing affordability of housing across the Central Ohio region by county.

County	Percent Vacant Owner Housing Units		Percent Vacant Renter Housing Units		Median Household Income		Median Home Sale Price		Median Home Price to Income Ratio 2022*	Average Monthly Rent		Average Monthly Owner Cost	
	2012	2022	2012	2022	2012	2022 (2022\$)	2016	2022		2012	2022 (2022\$)	2012	2022 (2022\$)
Delaware	1.7%	0.4%	5.9%	4.1%	\$115,356	\$123,995	\$341,421	\$480,790	3.88	\$1,101	\$1,338	\$2,544	\$2,362
Fairfield	1.9%	0.7%	6.2%	5.3%	\$75,168	\$82,969	\$211,559	\$324,900	3.91	\$ 985	\$1,042	\$1,860	\$1,599
Fayette	1.7%	0.4%	5.2%	0.2%	\$49,539	\$56,773	\$122,850	\$180,000	3.17	\$890	\$772	\$1,420	\$1,195
Franklin	2.9%	0.8%	9.5%	4.2%	\$64,625	\$71,070	\$197,536	\$299,000	4.21	\$1,025	\$1,169	\$1,846	\$1,667
Hocking	2.7%	0.7%	8.7%	5.9%	\$51,695	\$59,007	\$163,943	\$265,000	4.49	\$727	\$773	\$1,384	\$1,226
Knox	1.9%	0.7%	4.3%	5.0%	\$62,870	\$71,246	\$176,807	\$230,000	3.23	\$862	\$878	\$1,542	\$1,376
Licking	2.0%	0.6%	5.6%	4.9%	\$69,147	\$78,505	\$198,146	\$310,000	3.95	\$919	\$960	\$1,772	\$1,608
Logan	2.7%	1.5%	6.8%	6.8%	\$60,349	\$69,125	\$152,420	\$240,000	3.47	\$878	\$802	\$1,451	\$1,261
Madison	2.6%	0.5%	5.6%	3.2%	\$69,657	\$77,062	\$176,807	\$288,006	3.74	\$919	\$899	\$1,717	\$1,424
Marion	2.9%	1.6%	5.2%	3.5%	\$52,218	\$55,106	\$141,141	\$159,900	2.90	\$872	\$837	\$1,407	\$1,162
Morrow	1.6%	0.2%	0.7%	1.7%	\$65,688	\$70,412	\$176,807	\$278,450	3.95	\$874	\$895	\$1,553	\$1,404
Perry	2.6%	0.5%	5.7%	0.5%	\$53,819	\$62,899	\$166,686	\$229,250	3.64	\$730	\$695	\$1,287	\$1,221
Pickaway	2.0%	0.9%	4.0%	3.9%	\$68,513	\$67,600	\$182,904	\$300,000	4.43	\$908	\$906	\$1,737	\$1,575
Ross	1.9%	0.5%	6.9%	1.9%	\$56,199	\$58,048	\$157,297	\$215,000	3.70	\$831	\$827	\$1,457	\$1,278
Union	3.2%	0.0%	4.1%	1.3%	\$ 83,957	\$104,496	\$254,846	\$405,000	3.87	\$1,003	\$1,144	\$2,064	\$1,816

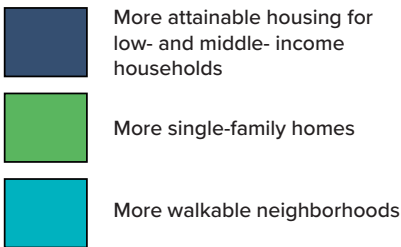
American Community Survey and Central Ohio MLS data

* Standard banking practices identify a ratio of 2.6 as an affordable ratio of Housing Price to Household Income based on historical averages.

Top Housing Investments and Changes Desired by Residents



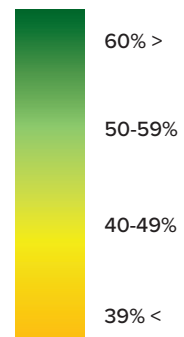
Top Investment Priority



Top Housing Change Desired



Percent Moderately to Extremely Satisfied with Leaders



Actionable Insights

The Leaders Listen: Housing survey points to area residents' desire for improved housing options at a time when the region is expecting rapid population growth. Central Ohioans want to maintain their sense of community and reasonable cost of living. Our regional growth affords us an opportunity to realize better housing experiences for all.