CHAPTER 2: REGIONAL TRENDS

Central Ohio is the fastest growing region in the Midwest and is one of the fastest growing in the entire country. The Columbus MPO is home to 1.6 million residents and over 900,000 jobs. The MPO is expected to hit 2.2 million residents and 1.2 million jobs by the year 2050. Both the magnitude and pattern of expected development impact demand on the region’s transportation system.

Just as land uses and economic systems provide the origin and destinations of travel patterns, the transportation system provides the means for connecting them. Transportation systems support the outwardly facing economy of the region, as well as serving internally focused mobility needs of residents and commerce.
2.a GROWTH & DEVELOPMENT PATTERNS

The Columbus region is positioned as a fulcrum for distributing goods to the Eastern United States and Midwest. Its physical infrastructure is extensive and augments its close proximity to large markets (goods leaving Columbus can reach approximately 46 percent of the U.S. population within a 10-hour drive). The regional economy is diverse and growing as a center for innovation in the Nation—it is a national center for insurance and finance, healthcare, research facilities, and increasingly the tech sector. At the same time, numerous anchor institutions lend stability to the region’s economy – Central Ohio is home to 52 college and university campuses (including The Ohio State University) and is the center of seat of state government for Ohio.

The region is attractive both to businesses and residents—evidenced by a decade with the strongest-ever annual average population growth—an increase of 24,000 residents each year during the 2010s.

The pattern of recent growth has changed. Preferences and lifestyles of the growing number of older adults (Baby Boomers) and young adults (Millennials and Gen Z) in the region are changing demand for housing. This changing demand, along with a shifting emphasis on the quality of life and cost-saving benefits of more compact development have resulted in the most centralized and compact growth pattern the region has experienced in decades.

DRIVERS OF CHANGE

Broadly, historic growth trends provide understanding of the key drivers of growth, which set the stage for predicting the future trajectory. As natural increase (the excess of births minus deaths) slows down in the region in alignment with national trends, future growth in the region will increasingly rely on new residents moving in from the U.S. and abroad.

Residents’ life stages and generational preferences will impact demand.

The needs of a growing population shift over time. The population will change by age as generations shift through different life stages in the next 30 years. Baby Boomers will age into older adulthood, Millennials will enter the typically more settled late 30s and 40s, and Gen Z will enter the more geographically mobile early adulthood years. As Baby Boomers retire, there will be changes for employers and social service providers as more of the population leaves the labor force. There will also be changes in housing and transportation needs that support residents at all stages of life, and that appeal to the changing preferences and lifestyles of young people choosing a place to live when entering the workforce.

Policies and planning strategies in the region set the stage for continued growth.

Compact, connected neighborhoods and the strategies of infill and redevelopment can help to meet the changing needs and preferences of the region’s growing population. Initiatives such as insight2050 and insight2050 Corridor Concepts explore how more walkable, bike-able, transit-supportive neighborhoods can positively impact transportation, infrastructure, housing, and the environment. These studies show there are clear quality of life, economic, community development, and environmental benefits that come from such development patterns, including better access to jobs, more and better mobility options, and more inclusive communities. By building upon the infrastructure we have today, Central Ohio can afford to grow in a way that makes resources go further and helps to meet the region’s growing need and preference for better-connected neighborhoods.
HISTORIC AND FUTURE GROWTH

The location of new housing and employment growth, and the density and proximity of future development, define what types of transportation services will be necessary to support improved quality of life and continued economic growth for the region in the years to come.

The MPO is expected to increase from 1.6 million people in 2018, to 2.2 million in 2050. This increase of an additional 541,000 people (34%) will require growing the housing stock from 635,000 to 850,000 units (34% increase) and growing the job market from 918,000 to 1.2 million (30%), as shown in Figure 2.1.

Recent trends toward denser and more centralized housing is a step in the right direction.

Residential development in the region has shifted in response to changing preferences in the region, with denser, multifamily projects comprising more than half of all housing units over the past decade. This is a step toward diversifying housing ‘products’ on the market that appeal to the changing demands of current residents, while also attracting both residents and employers to the region. Furthermore, the pattern of denser, more centralized housing signals a shift toward redevelopment and focused growth that can support high capacity transit and active transportation-friendly neighborhoods within the region.

Future growth in the region is expected to align with community plans and regional initiatives.

The distribution of future growth in the region is dependent on many factors—and that pattern of growth will inform the needs of the region’s transportation system. Existing conditions, community land use plans, infrastructure, environmental constraints, and regional planning and policy initiatives all play a role in the future development pattern. These factors were considered in a model, designed to predict the distribution of growth out to the planning horizon year.
MORPC used an approach to develop forecasts that begins with projections of growth of households and jobs by industry type at the county level. Figure 2.2 shows the process for establishing those growth control totals. The process requires multiple stages (the next dependent on the last) starting with projections for overall population growth.

The process begins with the overall trajectory of population growth at the county level, using a statistical model that accounts for the cyclical pattern of population growth in the observed trend. This cyclical pattern is largely driven by changes in migration, which are influenced by global and national geopolitical, economic, and social factors, as well as regional and local policies and initiatives.

In addition to using historic trends in births, deaths and migration to predict growth at the county level, population projections are broken down into key subgroups (population by age, population in households versus group quarters, and population in the labor force and employed workers), then translated into the number of households (based on household size and occupancy rates of housing units) and jobs (based on county-to-county commuting patterns) that would likely correspond with those additional people.

**FIGURE 2.2 ESTABLISHING COUNTY LEVEL CONTROL TOTALS**

**HISTORIC DYNAMICS OF POPULATION CHANGE**

From 2010 - 2018, Delaware and Franklin counties experienced growth that was 50% (around 90,000 residents) driven by natural increase (births minus deaths), and 50% (around 90,000 residents) by net migration into the two counties (Figure 2.3). This is a contrast from the previous decade. In the 2000s, more than 70% of growth was driven by natural increase, and less than 30% by migration.

In part, this shifting pattern aligns with a national trend. According to the U.S. Census Bureau:

“[B]ecause of population aging, immigration is projected to overtake natural increase [in the year 2030] … as the primary driver of population growth for the country.”

To the extent that the United States continues to grow its immigrant population, growth in the region will increasingly depend on migration from abroad and elsewhere in the U.S. One factor in continued growth in this part of the country will be the region’s growing attractiveness for residents and economic development opportunities.
Migration into the region can be largely attributed to new residents from places outside the United States. International migration into Franklin and Delaware counties made up nearly 60% (around 55,000 residents) of net migration into the region, while migration from elsewhere in the United States comprised around 40% (around 35,000 residents) (Figure 2.4).

In the 2000s (again, when less than 30% of all growth was driven by migration into the region), most of the growth (90%) was from people moving in from outside the United States (around 40,000 residents), and only 10% were residents from elsewhere in the nation (around 5,000 residents).

Growth in Central Ohio was largely driven by residents moving in from elsewhere within the state of Ohio. From 2010 – 2018, only 29 counties within Ohio grew in population (including all five counties within the MPO), while 59 counties in the state lost population. In the 2000s, 46 counties gained population, while 42 had fewer residents over the course of the decade.

Estimates of migration into Franklin County suggest there were also significant net gains in residents from Eastern and Central cities like the D.C. Metro, Philadelphia, Detroit, Minneapolis, Nashville and Miami. There are also new residents moving from Western and Southwestern locations including El Paso, Seattle, and counties in California, Nevada and Arizona.

Migration was a key driver of growth in Central Ohio. Half of the past decade’s growth was from residents moving to the region, and over 60% of those new residents were younger adults from about 25 to 39 years old. Expected future growth is dependent upon Central Ohio continuing to attract new residents. Availability of diverse housing choices and mobility options will play a prominent role in maintaining a competitive advantage by attracting and retaining a skilled workforce. Land use decisions that impact residents’ housing, transportation, and work lives are also complementary to the changing needs of an aging population.

The decisions that each community makes today will impact its quality of life and economic vitality for years to come. With continued policies and initiatives that attract increased capital investment, leverage the region’s intellectual and economic resources, provide jobs for residents, and support exceptional and equitable local services and desirable residential communities, Central Ohio is well-positioned to continue to attract new working age residents that will support growth in the years ahead.
FIGURE 2.4 MIGRATION BY TYPE
Franklin and Delaware Counties

FIGURE 2.5 POPULATION GROWTH BY AGE
7-County Central Ohio Region
CHARACTERISTICS OF PROJECTED POPULATION GROWTH

Since 1980, the share of growth attributed to the prime working-age population, residents ages 35 to 64, has gradually decreased. In the 2010s, that age group represented only 40% of total growth in the region and is predicted to make up an even smaller share of growth in the 2020s (only 22%) (Figure 2.5). Higher proportions of growth are among residents 65 and older and under 35, but for different reasons.

The large Baby Boomer generation is currently driving the increase in population 65 and older and will continue to drive growth of this age group through around 2040. In 2020, the youngest members of this generation are about 55 years old. The entire Baby Boomer generation will be 65 and older by about 2030. More people in the Baby Boomer generation and older moved out of the region than have moved in (Figure 2.7).

As migration is not driving growth, the increases in this age group are almost entirely caused by the sheer size of the population in the Boomer generation as they age into the 65 and older category. In 2020, there were an estimated 415,000 Baby Boomers in the region, making up 20% of the population (the second largest generation in Central Ohio). Due to this generation’s age shift, the 65 and older age group is expected to make up an increasingly large share of population growth through the 2030s (a projected 35% of growth in the 2030s) (Figure 2.7). Growth of that age group will slow down considerably in the 2040s when the smaller Generation X (19% or about 61 million people nationwide, and 19% or about 385,000 in Central Ohio) are 65 and older.

The Millennial generation is large, like the Baby Boomers, and the generation is in a geographically mobile life stage. Millennials are the largest generation in the region (23% or about 480,000 people) (Figure 6). In 2020, Millennials were from about 25 to 39 years old. Central Ohio has a higher-than-national-average share of this generation due to high net migration. Over 60% of the population that moved to the region in recent years are members of the Millennial generation (Figure 7).
High net migration of Millennials accounts for an increasingly large share of growth of the population under 35. In the 2010s, this age group made up 36% of population growth, and is expected to make up the largest proportion of growth in the 2020s (50%) (Figure 2.5). By 2030, the Millennials will be about 35 to 49 years old and are expected to become less geographically mobile during this life stage. At that time, the smaller Generation Z (19% or about 400,000 in Central Ohio) will be about 20 to 34 years old. While it is still predicted that this age group will continue to be at a “mobile” life stage, there will be fewer in the age group overall, which will cause growth in the population under 35 to slow down.

POLICY & PLANNING IMPACTS ON DEVELOPMENT

The regional insight2050 study completed in 2014 helped achieve consensus around a vision for compact, focused development throughout Central Ohio — an approach that comprehensively addresses the land use, housing, and transportation challenges ahead. Taking the direction of the “Focused Growth” scenario as a starting point, insight2050 Corridor Concepts (2019) builds on the momentum of that initial study, and outcomes of other recent planning efforts in the region, to better ground the vision. It explores in detail where growth can occur and how to make it happen. With Central Ohio considering investment of substantial resources in new transit options, the study evaluates the potential of coordinated transit and development to serve existing communities and new growth.

Insight2050 Corridor Concepts is a critical next step in the region’s commitment to thoughtful urban planning to improve livability and keep the region competitive. By evaluating the role of “mobility corridors” in structuring growth, the study explores how best the region could support a projection of continued growth.

Like other major metropolitan areas across the nation, Central Ohio is at the precipice of a new generation of mobility options that must be carefully considered and weighed. How will emerging technologies impact larger goals to address housing needs and affordability, promote equitable access
to opportunity, foster complete communities, and grow in more compact and fiscally efficient ways?

Well-informed discussions of these impacts and a holistic approach to the region’s growth will be necessary for Central Ohio to encourage a high quality of life for all. This is particularly true of housing: over the years, various studies have concluded Central Ohio lacks sufficient housing of all types and price points to meet the needs and preferences of its growing population. In response, a Regional Housing Strategy was introduced in 2020. This comprehensive report complements and builds upon past work to develop a regional approach to expanding the supply and affordability of housing in Central Ohio.

The Regional Housing Strategy presents scalable, implementable, context-sensitive strategies – including policies, programs, and funding resources – to address housing needs in the unique and varied markets across the region. In addition to increasing the supply of housing, these strategies recognize the relationship between land use and transportation. Housing and transportation costs together are often the two largest household expenses. Therefore, to improve affordability, a complete approach to mobility will be required — one that addresses walking, biking, transit, and automobile use, and balances impacts on land use, community health, and economic and environmental sustainability.

RESIDENTIAL DEVELOPMENT TRENDS

The past decade marks a distinctive shift toward more centralized, high-density development than in decades past. Estimates from the U.S. Census Bureau, shown in Figure 2.8, show for the first time, more multifamily than single family housing units were built. In the U.S. overall, there has also been a trend toward less single family and more multifamily construction. In the nation, around 73% of new units were single family, whereas only 63% were single family in the 2010s. In Franklin and Delaware counties, the share of single-family construction is nearly 20% lower than the nation.

FIGURE 2.8 UNITS IN STRUCTURE BY YEAR BUILT

*Franklin and Delaware Counties*
FIGURE 2.9 NUMBER OF NEW RESIDENTIAL UNITS BY TYPE
Metropolitan Planning Organization

FIGURE 2.10 SHARE OF OWNER AND RENTER HOUSEHolds
2013-2017 Estimates
MORPC building permit data similarly suggests that most of the new residential construction was multifamily in the past decade. Of the permits issued from 2010 – 2017, an estimated 59% were for multifamily units (Figure 2.9). While not always the case, multifamily units are typically renter-occupied households. There was strong growth in renter-occupied households in the 2010s, and recent estimates suggest that the Columbus MPO has a greater share of renter households (39%) than the state (29%), the Midwest region (28%), or the country (34%) (Figure 2.10). The share of renter households in the MPO has increased by about 4% since 2006 - 2010 period estimates.

With strong growth in multifamily housing over the past decade supporting a growing number of renter households in the region, there was a shift to denser and sometimes more centralized growth. Growth is strong regionwide. On average, the 7-county region grew by almost 67 new residents per day in the 2010s, up from 61 new residents per day in the 2000s, and 55 per day in the 1990s. That growth was highly centralized in Franklin County, which grew by a record 47 new residents per day (Figure 2.11).

In fact, over 70% of the region’s growth occurred in Franklin county (the most populous county in the region and in the state) in the 2010s. This is up from the 42% of regional growth in Franklin county that happened in the 2000s. While growth continues in the 6 counties surrounding Franklin county, it has slowed in those suburban or exurban counties in the 2010s (Figure 2.12).
FUTURE ALLOCATION OF GROWTH

Using community-based land use plans, along with data and research to contextualize development patterns and decisions, MORPC distributed future projected county growth to small geographic units called Traffic Analysis Zones (TAZs) for consumption by the travel demand model. Whereas the travel demand model is used to predict future traffic volumes and transit ridership, MORPC uses another model to allocate future development called the land use allocation model (see Appendix A for a more detailed methodology).

A graphical overview of the land use allocation model process is shown in Figure 2.13. The model uses existing data about the locations of households and jobs, along with community land use to determine the capacity for new growth in each small geographical unit. Once it was determined how much growth could occur in each location, data and research-based factors were used to determine how likely growth will be in each location. A set of measurable criteria were used to either attract or deter development. When possible, the strength of each criterion was determined using data to measure their relationship with development activity.
The criteria fell into four categories: (1) economic development, (2) environmental, (3) infrastructure, and (4) land use nuisances. Future implementation of Corridor Concepts was considered in the model by including a criterion to represent future, high capacity transit along the five corridors identified in that study.

After running the model, there were opportunities for community review. That feedback was incorporated by verifying inputs into the model and making corrections to the underlying data when possible. The final results by Traffic Analysis Zone can be seen in Figures 2.14 & 2.15.

Finally, the forecasts of households and employment were used to forecast other variables like population by age, workers, income and wages, and enrollment in schools and group quarters facilities.
Figure 2.14
Forecast Population Growth, 2018-2050

The information shown on this map is compiled from various sources made available to us, which are believed to be reliable.

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3/7/2020
Figure 2.15
Forecast Employment Growth, 2018-2050

The information shown on this map is compiled from various sources made available to us which we believe to be reliable.

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MORPC Transportation Planning Area
River/Water

Sources: MORPC

Ohio Location Map

Job growth 18-2050
0 - 5
6 - 50
51 - 250
251 - 500
501 - 1000
> 1000

The MID-OHIO REGIONAL PLANNING COMMISSION (MORPC) was established in 1966 by 32 Ohio counties for the purpose of coordinating regional transportation and land use planning. MORPC's role is to promote regional cooperation and to advise counties, municipalities, and other agencies on land use and transportation issues. MORPC's mission is to enhance the quality of life in the region by promoting smart growth, efficient transportation, and economic development.