Regional Housing Submarkets.

Housing needs and opportunities—place-based features; market conditions; housing stock; and household characteristics—vary across Central Ohio. An analysis of housing measures resulted in a set of 23 defining characteristics affecting 12 submarkets in different ways in Central Ohio.

Submarket characteristics can be viewed through two additional lenses: opportunity and gentrification. These lenses can be used to identify key housing issues or affected populations relative to conditions related to opportunity or gentrification-related change. Terms beginning on page 12 describe characteristics related to opportunity and gentrification-related change, which are additional lenses that can be applied to understand and prioritize housing issues. This information aligns relevant housing issues or impacted groups with each lens.

For a map of each submarket, please see Regional Housing Submarkets Appendix. More information is available in the Existing Conditions summary.
**Submarket 1: Late Century Suburbs**

**Strong market, single-family homes, aging residents**

**Defining characteristics**
- Strong transportation access (car)
- Limited transportation access (transit)
- Low vacancy
- Strong market conditions
- Limited housing diversity
- Older residents
- Low renter cost-burdens
- Moderate owner cost-burdens
- Expiring subsidized units

**Opportunity**
- Most tracts in this submarket offer very high opportunity or high-moderate opportunity. Only a small number offer low or very low opportunity.

**Gentrification & displacement**
- Most tracts in this submarket are not in any stage of gentrification. Those that are fall in the early stages.

**Communities**
- City of Dublin
- Norwich Township (Franklin County)
- City of Westerville
- Village of Brice
- Village of Minerva Park

### Physical characteristics
- Strong transportation access using automobiles
- Low access to transit service
- Moderate walkability (measured by intersection density)
- Low residential density

### Housing market
- **69%** High share of single-family homes
- **1.5%** Low share of homes built before 1950
- **3%** Moderate share built after 2010
- **31%** Low share of multifamily homes
- **25%** Low share of homes built before 1980
- **High share built after 1950**
- **High share built after 1980**

### Housing Stock
- **<1%** Low share of vacant homes
- **15%** High share of subsidized units at risk for expiration by end of 2025
- **22%** High share of Central Ohio’s expiring affordable housing units
- **86%** High number of home sales
  - Low share of single-family homes used as rentals
  - Moderate building activity (evidenced by building permits per acre)

**Household characteristics**
- **64%** High share of owner-occupied homes
- **36%** Low share of renter-occupied homes
- **$77,524** High average median household income
- **37 Years** Older residents, based on average median age
- **Moderate average household size: 2.5 people**
  - High household size among owners (2.6 people)
  - Moderate household size among renters (2.4 people)

**Opportunity**
- Reported as a share of total tracts in submarket; n=66

- Very high opportunity: 2%
- High-moderate opportunity: 32%
- Low-moderate opportunity: 59%
- Very low opportunity: 8%

**Gentrification & displacement**
- Reported as a share of total tracts in submarket; n=66

- Not gentrifying: 12%
- Early stages of gentrification (Susceptible; Type 1; Type 2): 88%
**Submarket 2: Late Century Exurbs**

*Single-family homes, limited building activity, aging residents*

### Defining characteristics
- Limited transportation access (transit)
- Moderate vacancy
- Limited production
- Limited housing diversity
- Larger households
- Older residents
- Moderate owner and renter cost-burdens
- Expiring subsidized units

### Communities
- Village of South Bloomfield
- Village of Ashville
- Village of Hebron
- Village of Johnstown
- Village of Lockbourne

### Opportunity
- Most tracts in this submarket offer high-moderate opportunity, followed by low opportunity.

### Gentrification & displacement
- Most tracts in this submarket are not in any stage of gentrification. Those that are, primarily fall in the early stages with a few in the mid- and late stages.

### Physical characteristics
- Moderate transportation access using automobiles
- Low access to transit service
- Low walkability (measured by intersection density)
- Low residential density

### Housing market
- **73%** Moderate share of single-family homes
- **12%** Moderate share built before 1950
- **<1%** Moderate share built after 2010
- **28%** Moderate share of multifamily homes
- **94%** Moderate share built before 1980
- **64%** High share built after 1950
- **10%** Low share built after 1980

### Housing Stock
- **86%** High number of home sales
- **15%** High share of subsidized units at risk for expiration by end of 2025
- **22%** High share of Central Ohio’s expiring affordable housing units
- **$863,121** Moderate average median sales price
- **$156,615** Moderate average median home value
- **$217,017** High average median sales price

### Household characteristics
- **68%** High share of owner-occupied homes
- **32%** Low share of renter-occupied homes
- **$62,308** Moderate average median household income
- **38 Years** Older residents, based on average median age
- **High household size:** 2.6 people
- **High household size among owners:** 2.7 people
- **High household size among renters:** 2.4 people
- **High share of Central Ohio’s expiring affordable housing units**
- **High share of Central Ohio’s subsidized affordable housing units**
- **High share of Central Ohio’s expiring subsidized affordable housing units**
- **15% Cost-burdened:** Moderate share of owners (18%)
- **28%** Moderate share of renters (28%)

### Opportunity
*Reported as a share of total tracts in submarket; n=41*

- **Very high opportunity**
- **High-moderate opportunity**
- **Low opportunity**
- **Very low opportunity**

### Gentrification & displacement
*Reported as a share of total tracts in submarket; n=41*

- **Not gentrifying**
- **Early stages of gentrification (Susceptible; Type 1; Type 2)**
- **Mid-stage of gentrification (Dynamic)**
- **Late stages of gentrification (Type 1; Type 2; Continued Loss)**
**Submarket 3: Mid-Century Small Lots**

**Defining characteristics**
- Moderate transit access
- Moderate vacancy
- Moderate density
- Single-family rentals
- Limited production
- Limited housing diversity
- Older residents
- Moderate owner cost-burdens
- High renter cost-burdens
- Expiring subsidized units

**Communities**
- City of Heath
- Village of Urbancrest
- Clinton Township (Franklin Co.)
- Mifflin Township (Franklin Co.)
- City of Upper Arlington

**Opportunity**
Most tracts in this submarket offer low or very low opportunity, although opportunity varies across this submarket with all levels represented.

**Gentrification & displacement**
Most tracts in this submarket are in the early stages of gentrification with a few in the mid- and late stages.

**Physical characteristics**
- Moderate transportation access using automobiles
- Moderate access to transit service
- Moderate walkability (measured by intersection density)
- Moderate residential density

**Housing market**
- **77%** Moderate share of single-family homes
- **14%** Moderate share built before 1950
- **4%** Moderate share built after 2010
- **23%** Moderate share of multifamily homes
- **52%** Moderate share built before 1980
- **26%** High share built after 1950
- **13%** Moderate share built after 1980

**Housing Stock**
- **4%** Moderate share of vacant homes
- **26%** Moderate share of subsidized units at risk or expiration by end of 2025
- **15%** High share of Central Ohio’s expiring affordable housing units
- **64%** Moderate number of home sales

**Cost-burdened:**
- Moderate share of owners (19%)
- High share of renters (32%)

**Household characteristics**
- 54% Moderate share of owner-occupied homes
- High average median household income
- **46%** Moderate share of renter-occupied homes
- Low average median household income

**Opportunity**
- **54%** Moderate share of owner-occupied homes
- **46%** Moderate share of renter-occupied homes
- 37 Years Older residents, based on average median age

**Cost-burdened:**
- Moderate share of owners (19%)
- High share of renters (32%)

**Gentrification & displacement**
- **36%** Not gentrifying
- **55%** Mid-stage of gentrification (Dynamic)
- **6%** Early stages of gentrification (Susceptible; Type 1; Type 2)
- **3%** Late stages of gentrification (Type 1; Type 2; Continued Loss)

**Household characteristics**
- **54%** Moderate share of owner-occupied homes
- High average median household income
- **46%** Moderate share of renter-occupied homes
- Low average median household income

**Opportunity**
- **36%** Not gentrifying
- **55%** Mid-stage of gentrification (Dynamic)
- **6%** Early stages of gentrification (Susceptible; Type 1; Type 2)
- **3%** Late stages of gentrification (Type 1; Type 2; Continued Loss)

**Housing Stock**
- **4%** Moderate share of vacant homes
- **26%** Moderate share of subsidized units at risk or expiration by end of 2025
- **15%** High share of Central Ohio’s expiring affordable housing units
- **64%** Moderate number of home sales

**Cost-burdened:**
- Moderate share of owners (19%)
- High share of renters (32%)

**Gentrification & displacement**
- **36%** Not gentrifying
- **55%** Mid-stage of gentrification (Dynamic)
- **6%** Early stages of gentrification (Susceptible; Type 1; Type 2)
- **3%** Late stages of gentrification (Type 1; Type 2; Continued Loss)

**Household characteristics**
- **54%** Moderate share of owner-occupied homes
- High average median household income
- **46%** Moderate share of renter-occupied homes
- Low average median household income

**Opportunity**
- **54%** Moderate share of owner-occupied homes
- **46%** Moderate share of renter-occupied homes
- 37 Years Older residents, based on average median age

**Cost-burdened:**
- Moderate share of owners (19%)
- High share of renters (32%)

**Gentrification & displacement**
- **36%** Not gentrifying
- **55%** Mid-stage of gentrification (Dynamic)
- **6%** Early stages of gentrification (Susceptible; Type 1; Type 2)
- **3%** Late stages of gentrification (Type 1; Type 2; Continued Loss)

**Household characteristics**
- **54%** Moderate share of owner-occupied homes
- High average median household income
- **46%** Moderate share of renter-occupied homes
- Low average median household income

**Opportunity**
- **54%** Moderate share of owner-occupied homes
- **46%** Moderate share of renter-occupied homes
- 37 Years Older residents, based on average median age

**Cost-burdened:**
- Moderate share of owners (19%)
- High share of renters (32%)

**Gentrification & displacement**
- **36%** Not gentrifying
- **55%** Mid-stage of gentrification (Dynamic)
- **6%** Early stages of gentrification (Susceptible; Type 1; Type 2)
- **3%** Late stages of gentrification (Type 1; Type 2; Continued Loss)
## Submarket 4: Aging Multifamily

**Moderate density, moderate transit access, moderate vacancy**

### Defining characteristics

- Strong transportation access (car)
- Moderate transit access
- Moderate vacancy
- Moderate density
- Single-family rentals
- High share of multifamily properties
- Moderate renter and owner cost-burdens
- Expiring subsidized units

### Communities

- City of Reynoldsburg
- Blendon Township (Franklin Co.)
- City of Whitehall
- Sharon Township (Franklin Co.)
- Mifflin Township (Franklin Co.)

### Opportunity

Opportunity varies across this submarket with all levels represented.

### Gentrification & displacement

Half of the tracts in this submarket are in the early stages of gentrification with a few in the mid- and late stages.

### Physical characteristics

- Strong transportation access using automobiles
- Moderate access to transit service
- Moderate walkability (measured by intersection density)
- Moderate residential density

### Housing market

- **Housing Stock**
  - 4% Moderate share of vacant homes
  - 21% Low share of subsidized units at risk or expiration by end of 2025
  - 15% High share of Central Ohio’s expiring affordable housing units
  - 46% Low number of home sales

- **Median home value**
  - $129,146

- **Median sales price**
  - $106,749

- **Median rent**
  - $863

### Household characteristics

- **30%** Low share of owner-occupied homes
- **70%** High share of renter-occupied homes

- **$42,920** Low average median household income
- **33 Years** Low average age of residents (based on average median age)

- **Low average household size: 2.2 people**

### Cost-burdened:

- Moderate share of owners (19%)
- Moderate share of renters (29%)

### Opportunity

Reported as a share of total tracts in submarket; n=35

- **Very high opportunity**
- **High-moderate opportunity**
- **Low opportunity**
- **Very low opportunity**

### Gentrification & displacement

Reported as a share of total tracts in submarket; n=34

- **Not gentrifying**
- **Early stages of gentrification (Susceptible; Type 1; Type 2)**
- **Mid-stage of gentrification (Dynamic)**
- **Late stages of gentrification (Type 1; Type 2; Continued Loss)**
### Submarket 5: Burgeoning Streetcar Neighborhoods

*High density, strong transportation access, older homes*

#### Defining characteristics
- Strong transportation access (car)
- Strong transportation access (transit)
- High vacancy
- High density
- Older homes
- Strong market conditions
- Single-family rentals
- High share of multifamily properties
- Moderate renter and owner cost-burdens
- Expiring subsidized units

#### Opportunity
Most tracts in this submarket offer very high or high-moderate opportunity, although opportunity varies across this submarket with all levels represented.

#### Gentrification & displacement
Tracts in this submarket are generally split: nearly half are not in any stage of gentrification and the other half are in the mid- and late stages of gentrification. Few tracts are in the early stages of gentrification.

### Communities
- City of Columbus

### Household characteristics

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low share of owner-occupied homes</td>
<td>27%</td>
</tr>
<tr>
<td>High share of renter-occupied homes</td>
<td>73%</td>
</tr>
<tr>
<td>Low average median household income</td>
<td>$49,958</td>
</tr>
<tr>
<td>Low average age of residents (based on average median age)</td>
<td>30 Years</td>
</tr>
<tr>
<td>Low average household size</td>
<td>2.2 people</td>
</tr>
</tbody>
</table>

#### Cost-burdened:
- Moderate share of owners (19%)
- Moderate share of renters (29%)

#### Opportunity
Reported as a share of total tracts in submarket; n=16

#### Gentrification & displacement
Reported as a share of total tracts in submarket; n=17

#### Physical characteristics

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strong transportation access using automobiles</td>
<td>42%</td>
</tr>
<tr>
<td>Strong access to transit service</td>
<td>79%</td>
</tr>
<tr>
<td>Strong walkability (measured by intersection density)</td>
<td>5%</td>
</tr>
<tr>
<td>High residential density</td>
<td>31%</td>
</tr>
</tbody>
</table>

#### Housing market

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low share of single-family homes</td>
<td>42%</td>
</tr>
<tr>
<td>High share built before 1950</td>
<td>79%</td>
</tr>
<tr>
<td>Moderate share built after 2010</td>
<td>5%</td>
</tr>
<tr>
<td>High share of multifamily homes</td>
<td>58%</td>
</tr>
<tr>
<td>High share built before 1980</td>
<td>82%</td>
</tr>
<tr>
<td>Moderate share built after 1980</td>
<td>25%</td>
</tr>
</tbody>
</table>

#### Housing Stock

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>High share of vacant homes</td>
<td>5%</td>
</tr>
<tr>
<td>High share of subsidized units at risk or expiration by end of 2025</td>
<td>33%</td>
</tr>
<tr>
<td>Moderate share of Central Ohio’s expiring affordable housing units</td>
<td>9%</td>
</tr>
<tr>
<td>Low number of home sales</td>
<td>48%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>High share of Central Ohio’s subsidized affordable housing units (7%)</td>
<td>$212,918</td>
</tr>
<tr>
<td>High level building activity (evidenced by building permits per acre)</td>
<td>$230,137</td>
</tr>
<tr>
<td>High share of single-family homes used as rentals (46%)</td>
<td>Moderate average median rent</td>
</tr>
<tr>
<td>High average median home value</td>
<td>High average median sales price</td>
</tr>
</tbody>
</table>

#### Household characteristics

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very high-moderate opportunity</td>
<td>19%</td>
</tr>
<tr>
<td>High-moderate opportunity</td>
<td>25%</td>
</tr>
<tr>
<td>Low opportunity</td>
<td>31%</td>
</tr>
<tr>
<td>Very low opportunity</td>
<td>25%</td>
</tr>
</tbody>
</table>

#### Gentrification & displacement

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not gentrifying</td>
<td>47%</td>
</tr>
<tr>
<td>Early stages of gentrification (Susceptible; Type 1; Type 2)</td>
<td>24%</td>
</tr>
<tr>
<td>Mid-stage of gentrification (Dynamic)</td>
<td>24%</td>
</tr>
<tr>
<td>Late stages of gentrification (Type 1; Type 2; Continued Loss)</td>
<td>6%</td>
</tr>
</tbody>
</table>
**Submarket 6: High-Demand, Inner-Ring Suburbs**

**Strong market conditions, low vacancy, single-family homes**

**Defining characteristics**
- Strong transportation access (car)
- Moderate transit access
- Low vacancy
- Moderate density
- Strong market conditions
- Limited housing diversity
- Older residents
- Low renter cost-burdens
- Moderate owner cost-burdens
- Expiring subsidized units

**Opportunity**
- Most tracts in this submarket offer very high opportunity and nearly all tracts offer very high or high-moderate opportunity.

**Gentrification & displacement**
- Most tracts in this submarket are not in any stage of gentrification. Those that are either fall in the early or late stages.

**Communities**
- City of Bexley
- Village of Riverlea
- City of Grandview Heights
- Village of Marble Cliff
- City of Upper Arlington

**Physical characteristics**

<table>
<thead>
<tr>
<th>Housing Stock</th>
<th>Housing market</th>
</tr>
</thead>
<tbody>
<tr>
<td>1% Low share of vacant homes</td>
<td>73% Moderate share of single-family homes</td>
</tr>
<tr>
<td>52% High share of subsidized units at risk or expiration by end of 2025</td>
<td>63% High share built before 1950</td>
</tr>
<tr>
<td>2% Low share of Central Ohio’s expiring affordable housing units</td>
<td>1% Low share built after 2010</td>
</tr>
<tr>
<td>61 Moderate number of home sales</td>
<td>27% High share of multifamily homes</td>
</tr>
<tr>
<td></td>
<td>95% Low share built after 1980</td>
</tr>
</tbody>
</table>

**Cost-burdened:**
- Moderate share of owners (17%)
- Low share of renters (24%)

**Housing market**
- Moderate average median rent: $956
- High average median home value: $278,754
- High average median sales price: $308,030

**Opportunity**
- Very high opportunity: 67%
- High-moderate opportunity: 33%
- Very low opportunity: 4%
- Low opportunity: 4%
- Very high-moderate opportunity: 4%

**Cost-burdened:**
- Low renter cost-burdens: Low
- Moderate owner cost-burdens: Moderate
- Expiring subsidized units: Low

**Household characteristics**
- 37 Years: Older average age of residents (based on average median age)
- $88,519: Low average median household income
- Moderate average household size: 2.3 people
- Moderate household size among owners (2.4 people)
- Low household size among renters (2.0 people)

**Gentrification & displacement**
- Not gentrifying: 83%
- Early stages of gentrification (Susceptible; Type 1; Type 2): 4%
- Mid-stage of gentrification (Dynamic): 4%
- Late stages of gentrification (Type 1; Type 2; Continued Loss): 12%

**Reported as a share of total tracts in submarket; n=35**

**Reported as a share of total tracts in submarket; n=34**

**Household characteristics**
- 37 Years: Older average age of residents (based on average median age)
- $88,519: Low average median household income
- Moderate average household size: 2.3 people
- Moderate household size among owners (2.4 people)
- Low household size among renters (2.0 people)

**Gentrification & displacement**
- Not gentrifying: 83%
- Early stages of gentrification (Susceptible; Type 1; Type 2): 4%
- Mid-stage of gentrification (Dynamic): 4%
- Late stages of gentrification (Type 1; Type 2; Continued Loss): 12%

**Household characteristics**
- 37 Years: Older average age of residents (based on average median age)
- $88,519: Low average median household income
- Moderate average household size: 2.3 people
- Moderate household size among owners (2.4 people)
- Low household size among renters (2.0 people)

**Gentrification & displacement**
- Not gentrifying: 83%
- Early stages of gentrification (Susceptible; Type 1; Type 2): 4%
- Mid-stage of gentrification (Dynamic): 4%
- Late stages of gentrification (Type 1; Type 2; Continued Loss): 12%
Submarket 7: Emerging Demand Neighborhoods

**High density, weak market conditions, single-family homes**

**Defining characteristics**
- Strong transportation access (car)
- Moderate transit access
- High vacancy
- Moderate density
- Weak market conditions
- Single-family rentals
- Limited housing diversity
- Larger households
- High renter and owner cost-burdens

**Communities**
- City of Columbus

**Opportunity**
- Most tracts in this submarket offer very low opportunity and nearly all tracts offer low or very low opportunity.

**Gentrification & displacement**
- Most tracts in this submarket are in some stage of gentrification, with most in early stages followed by the dynamic stage.

**Physical characteristics**

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strong transportation access</td>
<td>Using automobiles</td>
</tr>
<tr>
<td>Moderate transit access</td>
<td>Service strength</td>
</tr>
<tr>
<td>Strong walkability</td>
<td>Intersection density</td>
</tr>
<tr>
<td>Moderate residential density</td>
<td></td>
</tr>
</tbody>
</table>

**Housing market**

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>High share of single-family homes</td>
<td>78%</td>
</tr>
<tr>
<td>High share built before 1950</td>
<td>83%</td>
</tr>
<tr>
<td>Low share built after 2010</td>
<td>2%</td>
</tr>
<tr>
<td>Low share of multifamily homes</td>
<td>22%</td>
</tr>
<tr>
<td>High share built before 1980</td>
<td>97%</td>
</tr>
<tr>
<td>Moderate share built before 1920</td>
<td>30%</td>
</tr>
<tr>
<td>Low share built after 1950</td>
<td>17%</td>
</tr>
<tr>
<td>Low share built after 1980</td>
<td>3%</td>
</tr>
</tbody>
</table>

**Housing Stock**

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>High share of vacant homes</td>
<td>13%</td>
</tr>
<tr>
<td>Moderate share of subsidized units</td>
<td>24%</td>
</tr>
<tr>
<td>Low share of Central Ohio’s expiring affordable housing units</td>
<td>4%</td>
</tr>
<tr>
<td>High number of home sales</td>
<td>87%</td>
</tr>
</tbody>
</table>

**Household characteristics**

- **Low share of owner-occupied homes**: 39%
- **High share of renter-occupied homes**: 61%

**Cost-burdened**
- High share of owners (20%)
- High share of renters (38%)

**Opportunity**
- Reported as a share of total tracts in submarket; n=27

**Gentrification & displacement**
- Reported as a share of total tracts in submarket; n=27

**Physical and market characteristics**

- High share of single-family homes
- High share built before 1950
- Low share built after 2010
- Low share of multifamily homes
- High share built before 1980
- Moderate share built before 1920
- Low share built after 1950
- Low share built after 1980

**Housing market**

- High share of single-family homes
- High share built before 1950
- Low share built after 2010
- Low share of multifamily homes
- High share built before 1980
- Moderate share built before 1920
- Low share built after 1950
- Low share built after 1980

**Housing Stock**

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| High share of vacant homes | $779
- Low average median rent |
| Moderate share of subsidized units | $74,633
- Low average median home value |
| Low share of Central Ohio’s expiring affordable housing units | $57,542
- Low average median sales price |
| High number of home sales | 87% |

**Household characteristics**

- **Low share of owner-occupied homes**: 39%
- **High share of renter-occupied homes**: 61%

**Cost-burdened**
- High share of owners (20%)
- High share of renters (38%)

**Opportunity**
- Reported as a share of total tracts in submarket; n=27

**Gentrification & displacement**
- Reported as a share of total tracts in submarket; n=27

**Physical and market characteristics**

- High share of single-family homes
- High share built before 1950
- Low share built after 2010
- Low share of multifamily homes
- High share built before 1980
- Moderate share built before 1920
- Low share built after 1950
- Low share built after 1980

**Housing market**

- High share of single-family homes
- High share built before 1950
- Low share built after 2010
- Low share of multifamily homes
- High share built before 1980
- Moderate share built before 1920
- Low share built after 1950
- Low share built after 1980

**Housing Stock**

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| High share of vacant homes | $779
- Low average median rent |
| Moderate share of subsidized units | $74,633
- Low average median home value |
| Low share of Central Ohio’s expiring affordable housing units | $57,542
- Low average median sales price |
| High number of home sales | 87% |

**Household characteristics**

- **Low share of owner-occupied homes**: 39%
- **High share of renter-occupied homes**: 61%

**Cost-burdened**
- High share of owners (20%)
- High share of renters (38%)

**Opportunity**
- Reported as a share of total tracts in submarket; n=27

**Gentrification & displacement**
- Reported as a share of total tracts in submarket; n=27

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not gentrifying</td>
<td></td>
</tr>
<tr>
<td>Early stages of gentrification</td>
<td>19%</td>
</tr>
<tr>
<td>Mid-stage of gentrification</td>
<td>59%</td>
</tr>
<tr>
<td>Late stages of gentrification</td>
<td>19%</td>
</tr>
</tbody>
</table>

**Household characteristics**

- **Low share of owner-occupied homes**: 39%
- **High share of renter-occupied homes**: 61%

**Cost-burdened**
- High share of owners (20%)
- High share of renters (38%)

**Opportunity**
- Reported as a share of total tracts in submarket; n=27

**Gentrification & displacement**
- Reported as a share of total tracts in submarket; n=27

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not gentrifying</td>
<td></td>
</tr>
<tr>
<td>Early stages of gentrification</td>
<td>19%</td>
</tr>
<tr>
<td>Mid-stage of gentrification</td>
<td>59%</td>
</tr>
<tr>
<td>Late stages of gentrification</td>
<td>19%</td>
</tr>
</tbody>
</table>

**Household characteristics**

- **Low share of owner-occupied homes**: 39%
- **High share of renter-occupied homes**: 61%

**Cost-burdened**
- High share of owners (20%)
- High share of renters (38%)

**Opportunity**
- Reported as a share of total tracts in submarket; n=27

**Gentrification & displacement**
- Reported as a share of total tracts in submarket; n=27

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not gentrifying</td>
<td></td>
</tr>
<tr>
<td>Early stages of gentrification</td>
<td>19%</td>
</tr>
<tr>
<td>Mid-stage of gentrification</td>
<td>59%</td>
</tr>
<tr>
<td>Late stages of gentrification</td>
<td>19%</td>
</tr>
</tbody>
</table>
Submarket 8: Rural
Moderate vacancy, aging residents, limited transportation access

**Defining characteristics**
- Limited transportation access (car)
- Limited transportation access (transit)
- Moderate vacancy
- Limited production
- Limited housing diversity
- Larger households
- Older residents
- Low renter cost-burdens
- Moderate owner cost-burdens

**Opportunity**
Most tracts in this submarket offer high-moderate opportunity, followed by low opportunity. No tracts offer very low opportunity.

**Gentrification & displacement**
None of the tracts in this submarket are in any stage of gentrification.

**Communities**
- Kingston Township (Delaware Co.)
- Pleasant Township (Franklin Co.)
- Wayne Township (Pickaway Co.)
- Amanda Township (Fairfield Co.)
- Washington Township (Licking Co.)
- Pike Township (Madison Co.)
- Liberty Township (Union Co.)

---

**Physical characteristics**
- Low transportation access using automobiles
- Low access to transit service
- Low walkability (measured by intersection density)
- Low residential density

**Housing market**
- 96% High share of single-family homes
- 22% Moderate share built before 1950
- 4% Moderate share built after 2010
- 5% Low share of multifamily homes
- 55% Moderate share built before 1980
- Moderate share built before 1920 (14%)
- High share built after 1950 (78%)
- High share built after 1980 (45%)

**Housing Stock**
- 1% Moderate share of vacant homes
- 21% Low share of subsidized units at risk or expiration by end of 2025
- 3% Low share of Central Ohio's expiring affordable housing units
- 48 Low number of home sales
  - Low share of Central Ohio's subsidized affordable housing units (3%)
  - Low building activity (evidenced by building permits per acre) (0)
  - Low share of single-family homes used as rentals (13%)

**Household characteristics**
- 84% High share of owner-occupied homes
- 16% Low share of renter-occupied homes
- $69,741 Moderate average median household income
- 43 Years Older average age of residents (based on average median age)
- High average household size: 2.7 people
- High household size among owners (2.7 people)
- High household size among renters (2.9 people)

**Opportunity**
- Reported as a share of total tracts in submarket; n=45

- Very high opportunity
- High-moderate opportunity
- Low opportunity
- Very low opportunity

**Gentrification & displacement**
- Reported as a share of total tracts in submarket; n=45

- Not gentrifying
- Early stages of gentrification (Susceptible; Type 1; Type 2)
- Mid-stage of gentrification (Dynamic)
- Late stages of gentrification (Type 1; Type 2; Continued Loss)
# Submarket 9: Town Centers

**Moderate density, weak market conditions, older homes**

## Defining characteristics
- Limited transportation access (transit)
- High vacancy
- Moderate density
- Older homes
- Weak market conditions
- Single-family rentals
- Limited production
- Limited housing diversity
- Moderate renter and owner cost-burdens
- Expiring subsidized units

## Communities
- Village of Valleyview
- Township of Newark
- Madison Township (Licking Co.)
- City of Lancaster
- City of Circleville

## Opportunity
Most tracts in this submarket offer low or very low opportunity, although opportunity varies across this submarket with all levels represented.

## Gentrification & displacement
About half of the tracts in this submarket are not in any stage of gentrification. Those that are, primarily fall into the early stages.

### Physical characteristics
- Moderate transportation access using automobiles
- Low access to transit service
- Moderate walkability (measured by intersection density)
- Moderate residential density

### Housing Stock
- High share of vacant homes: 5%
- High share of subsidized units at risk or expiration by end of 2025: 37%
- Moderate share of Central Ohio’s expiring affordable housing units: 8%
- Low number of home sales: 47%

### Housing market
- Moderate share of single-family homes: 72%
- High share built before 1950: 68%
- Low share built after 2010: <1%

- Moderate share of multifamily homes: 28%
- High share built before 1980: 93%
- Low share built after 1980: 7%

### Opportunity
- Moderate share of owner-occupied homes: 50%
- Moderate share of renter-occupied homes: 50%
- Low average median household income: $39,361
- Moderate average age of residents: 35 Years

### Household characteristics
- Cost-burdened: Moderate average household size: 2.4 people
- Moderate share of owners (18%)
- Moderate share of renters (32%)

### Gentrification & displacement
- Early stages of gentrification (Susceptible; Type 1; Type 2): 15%
- Not gentrifying: 10%
- Mid-stage of gentrification (Dynamic): 43%
- Late stages of gentrification (Type 1; Type 2; Continued Loss): 33%
### Submarket 10: High-Demand Exurbs
**Newer homes, single-family homes, strong housing market**

#### Defining characteristics
- Limited transportation access (transit)
- Low vacancy
- Newer homes
- Strong market conditions
- Limited housing diversity
- Larger households
- Older residents
- Low renter cost-burdens
- Moderate owner cost-burdens

#### Opportunity
Most tracts in this submarket offer very high opportunity and nearly all tracts offer very high or high-moderate opportunity.

#### Gentrification & displacement
Most tracts in this submarket are not in any stage of gentrification. Those that are, fall into the early stages.

#### Communities
- Berlin Township (Delaware Co.)
- Brown Township (Franklin Co.)
- Village of Commercial Point
- Concord Township (Delaware Co.)
- Jefferson Township (Franklin Co.)

#### Physical characteristics
- Moderate transportation access using automobiles
- Low access to transit service
- Low walkability (measured by intersection density)
- Low residential density

#### Housing market
- **High share of single-family homes**: 87%
- **Low share of multifamily homes**: 13%
- **High share built after 2010**: 14%
- **Low share built before 1950**: 3%
- **High share built after 2010**: 13%
- **Low share built before 1980**: 15%
- **High share built after 1950 (97%)**:
- **High share built after 1980 (85%)**:

#### Housing Stock
- **Low share of vacant homes**: <1%
- **Low share of subsidized units at risk or expiration by end of 2025**: 13%
- **Low share of Central Ohio’s expiring affordable housing units**: 4%
- **High number of home sales**: 137

#### Household characteristics
- **82%** High share of owner-occupied homes
- **18%** Low share of renter-occupied homes
- **$105,391** High average median household income
- **37 Years** Older average age of residents (based on average median age)

#### Cost-burdened:
- Moderate share of owners (19%)
- Low share of renters (25%)

### Opportunity
**Reported as a share of total tracts in submarket; n=43**

- **Very high opportunity**
- **High-moderate opportunity**
- **Low opportunity**
- **Very low opportunity**

### Gentrification & displacement
**Reported as a share of total tracts in submarket; n=43**

- **Not gentrifying**
- **Early stages of gentrification (Susceptible; Type 1; Type 2)**
- **Mid-stage of gentrification (Dynamic)**
- **Late stages of gentrification (Type 1; Type 2; Continued Loss)**
**Submarket 11: Ohio State Campus Area**

*High density, strong transportation access, older homes*

### Defining characteristics
- Strong transportation access (car)
- Strong transportation access (transit)
- Moderate vacancy
- High density
- Older homes
- Single-family rentals
- High share of multifamily properties
- Larger households
- Low owner cost-burdens
- High renter cost-burdens

### Communities
- City of Columbus

### Opportunity
One of the two tracts that make up this submarket offers high-moderate opportunity and the other one offers low opportunity.

### Gentrification & displacement
Only one tract in this submarket was included in the gentrification analysis due to missing data in the other tract. It is in the dynamic or mid-stage of gentrification.

### Physical characteristics
- High transportation access using automobiles
- High transit access
- High walkability (measured by intersection density)
- High residential density

### Housing market
- Low share of single-family homes: 20%
- High share of multifamily homes: 80%
- High share built before 1950: 94%
- Low share built after 2010: 1%

### Housing Stock
- Moderate share of vacant homes: 2%
- Low share of Central Ohio’s subsidized affordable housing units: 0%
- High share of single-family homes used as rentals: 88%
- Low number of home sales: 0%

### Cost-burdened:
- High share of renter-occupied homes: 96%

### Household characteristics
- Low share of owner-occupied homes: 4%
- Low average median household income: $22,707
- Low average age of residents (based on average median age): 22 Years

### Opportunity
Reported as a share of total tracts in submarket; n=2)

- Very high opportunity
- High-moderate opportunity
- Low opportunity
- Very low opportunity

### Gentrification & displacement
Reported as a share of total tracts in submarket; n=1)

- Not gentrifying
- Early stages of gentrification (Susceptible; Type 1; Type 2)
- Mid-stage of gentrification (Dynamic)
- Late stages of gentrification (Type 1; Type 2; Continued Loss)
Submarket 12: Downtown City of Columbus
High density, strong transportation access, newer homes

Defining characteristics
Strong transportation access (car)
Strong transportation access (transit)
Moderate vacancy
High density
Newer homes
Single-family rentals
High share of multifamily properties
Low renter cost-burdens
Moderate owner cost-burdens

Opportunity
The two tracts that make up this submarket offer high-moderate opportunity.

Gentrification & displacement
None of the tracts that make up this submarket are in any stage of gentrification.

Communities
City of Columbus

Physical characteristics
- High transportation access using automobiles
- High transit access
- High walkability (measured by intersection density)
- High residential density

Housing market
- 7% Low share of single-family homes
- 36% Moderate share built before 1950
- 8% High share built after 2010
- 93% High share of multifamily homes
- 38% Low share built before 1980
- Moderate share build after 1920 (27%)
- Moderate share built after 1950 (64%)
- High share built after 1980 (62%)

Housing Stock
- 3% Moderate share of vacant homes
- 30% Moderate share of subsidized units at risk or expiration by end of 2025
- 5% Moderate share of Central Ohio’s expiring affordable housing units
- 51 Moderate number of home sales

- Low share of Central Ohio’s subsidized affordable housing units (4%)
- High building activity (evidenced by building permits per acre)
- High share of single-family homes used as rentals (70%)

Household characteristics
- 20% Low share of owner-occupied homes
- 80% High share of renter-occupied homes

Cost-burdened:
- Moderate share of owners (17%)
- Low share of renters (25%)

Opportunity
Reported as a share of total tracts in submarket; n=2)

Gentrification & displacement
Reported as a share of total tracts in submarket; n=2)

- Very high opportunity
- High-moderate opportunity
- Low-moderate opportunity
- Very low opportunity

- Not gentrifying
- Early stages of gentrification (Susceptible; Type 1; Type 2)
- Mid-stage of gentrification (Dynamic)
- Late stages of gentrification (Type 1; Type 2; Continued Loss)

- Moderate average median household income
- $47,127
- 33 Years
- Low average age of residents (based on average median age)
- Low average household size: 1.4 people
- Low household size among owners (1.6 people)
- Low household size among renters (1.4 people)

- Moderate average median home value
- $241,250
- High average median sales price
- $141,250
- Moderate average median household income
- $870

- Low share of owner-occupied homes
- Early stages of gentrification (Susceptible; Type 1; Type 2)
- Mid-stage of gentrification (Dynamic)
- Late stages of gentrification (Type 1; Type 2; Continued Loss)