

# insight2050: Modeling Central Ohio's Future



Mid-Ohio Regional  
Planning Commission

NAIOP  
March 14, 2018



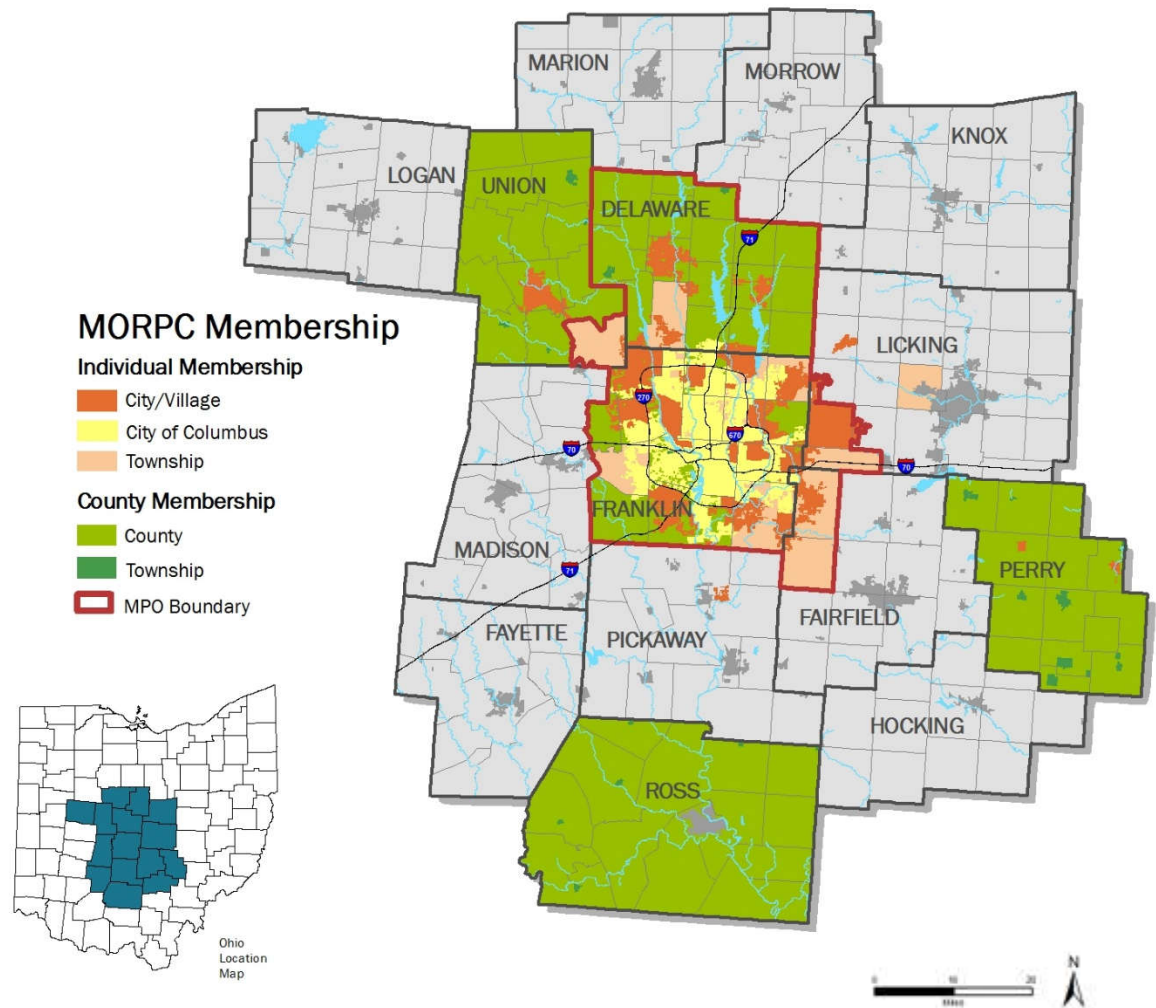
Transportation  
Systems & Funding

Regional Data &  
Mapping

Energy & Air Quality

Planning &  
Environment

Public & Government  
Affairs





COLUMBUS  
2020



Communities



Development



Population  
Growth

# Future Growth Results



**+ 300,000**  
new residences



**+ 1 billion**  
square feet of new or  
redeveloped non-residential  
building space

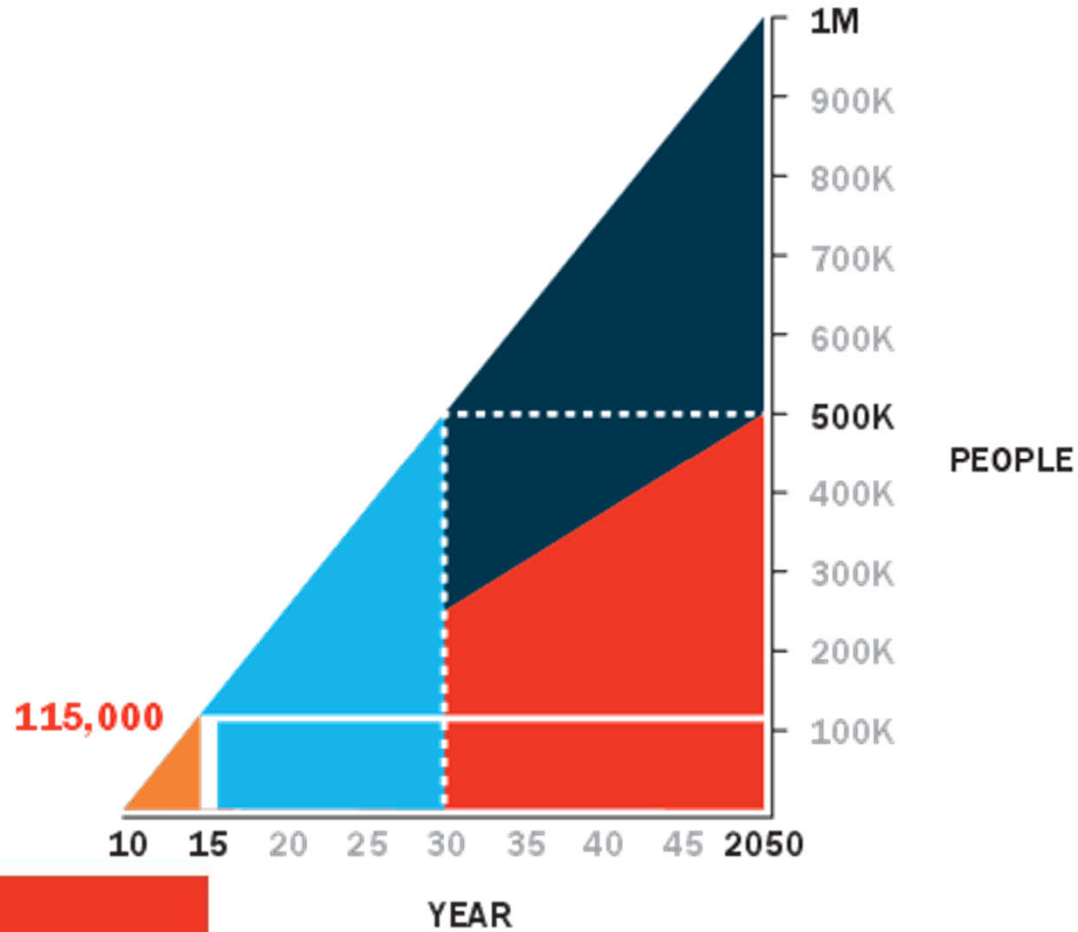


**+ 300,000**  
new jobs

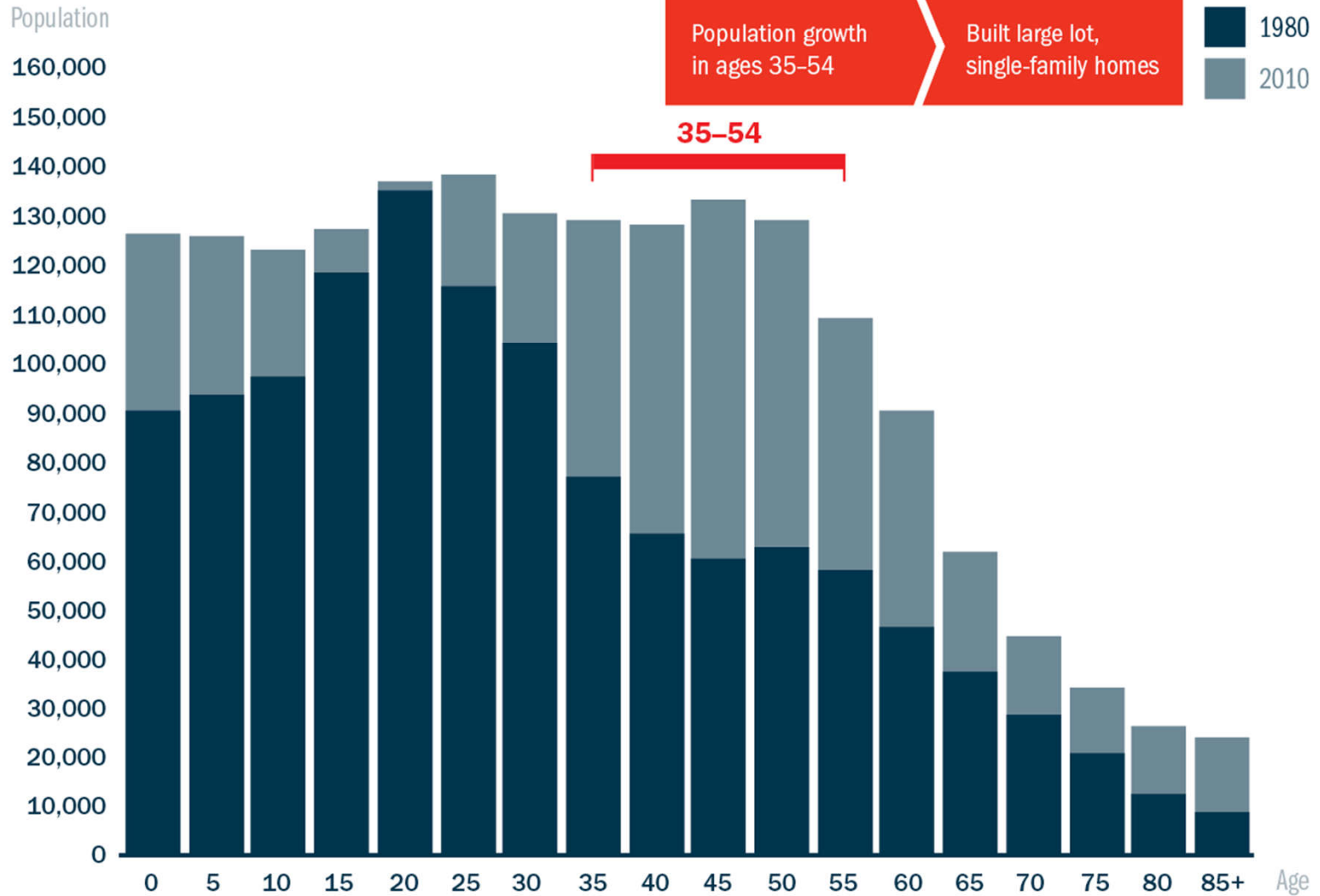


**+ 500,000**  
people

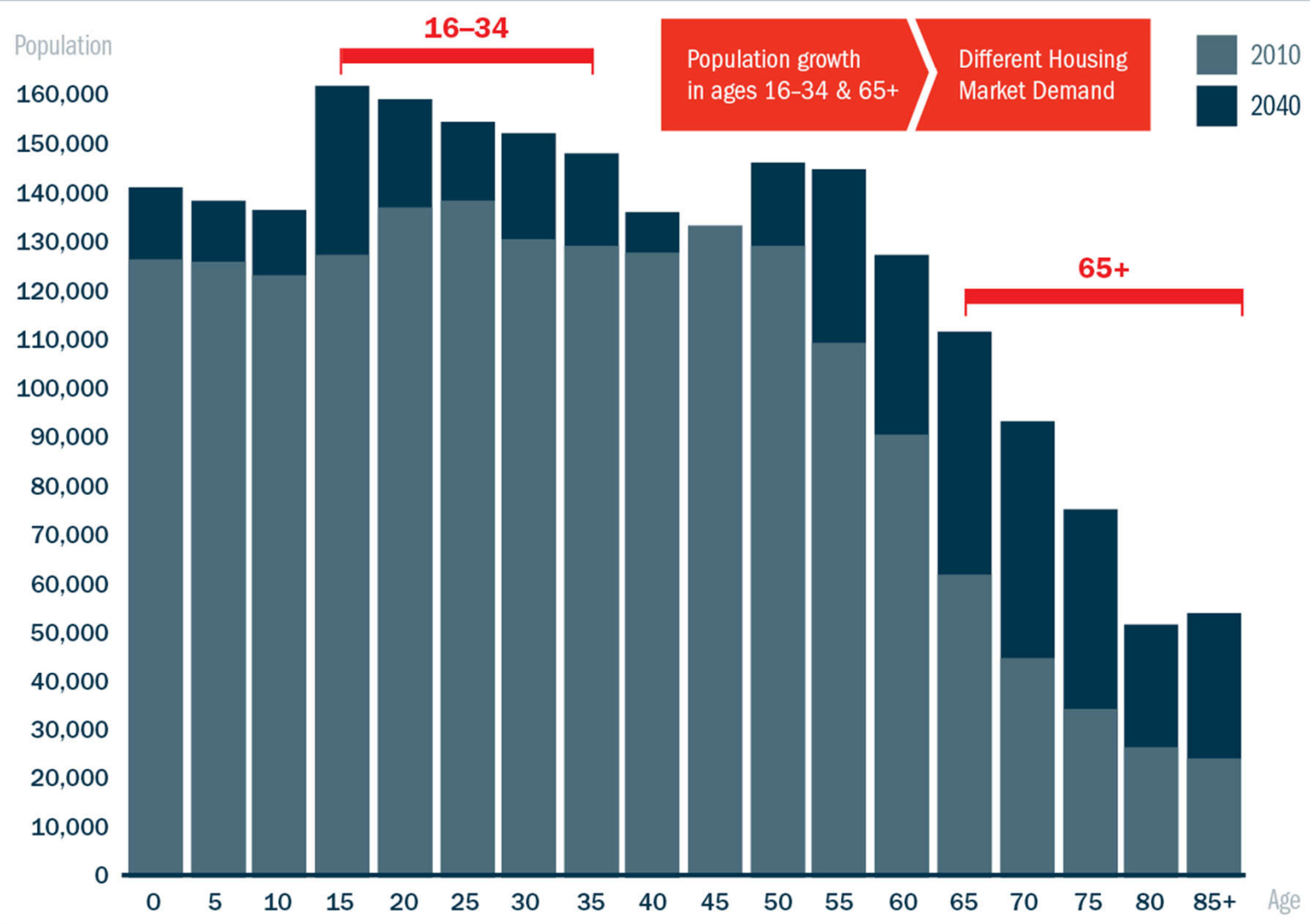
# New Population Projections



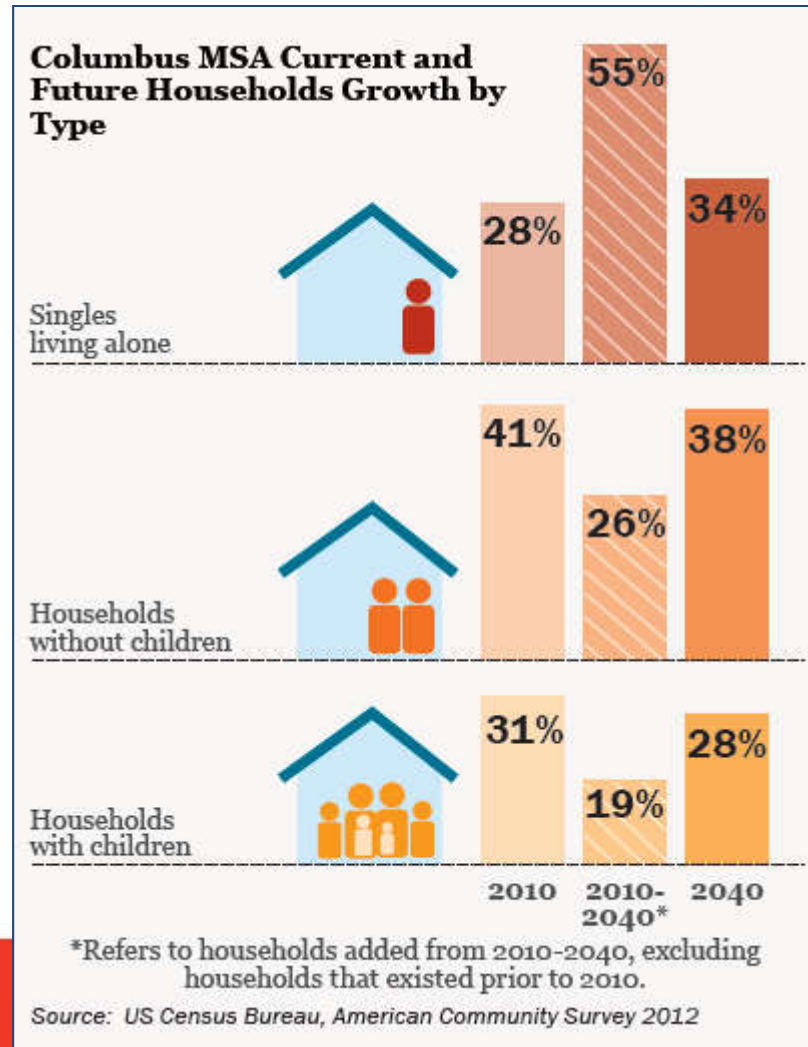
# Past Growth by Age



# Future Growth by Age



# Household Growth By Type





# Meeting Market Demand:

## → Walkable neighborhoods

More transportation choices

Mixed use environments

Smaller residences, less maintenance

Mixed age, mixed income communities



# Meeting Market Demand:

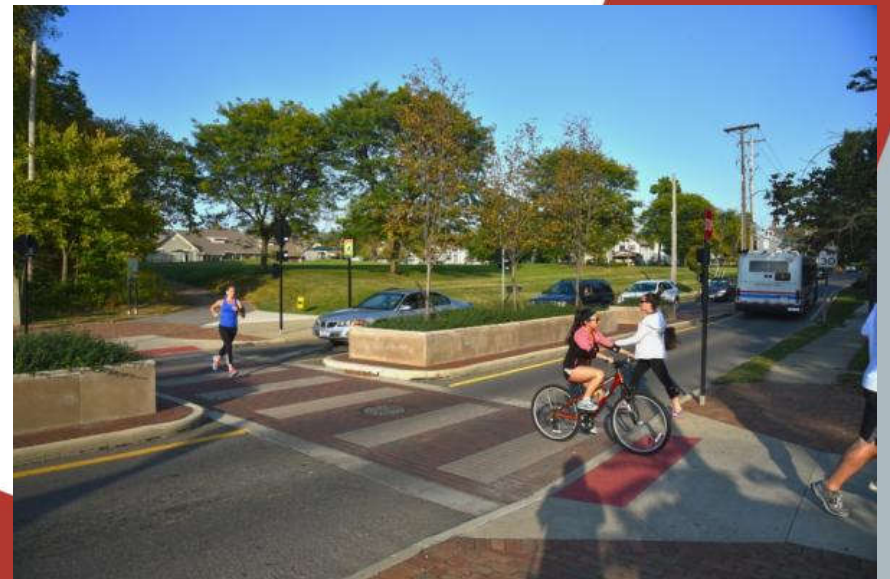
Walkable neighborhoods

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Walkable neighborhoods

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# Meeting Market Demand:

Walkable neighborhoods

More transportation choices

Mixed use environments

- Smaller residences, less maintenance
- Mixed age, mixed income communities



# Housing



Ripple Effects

# Infrastructure



**Ripple Effects**

# Economic Development



**Ripple Effects**

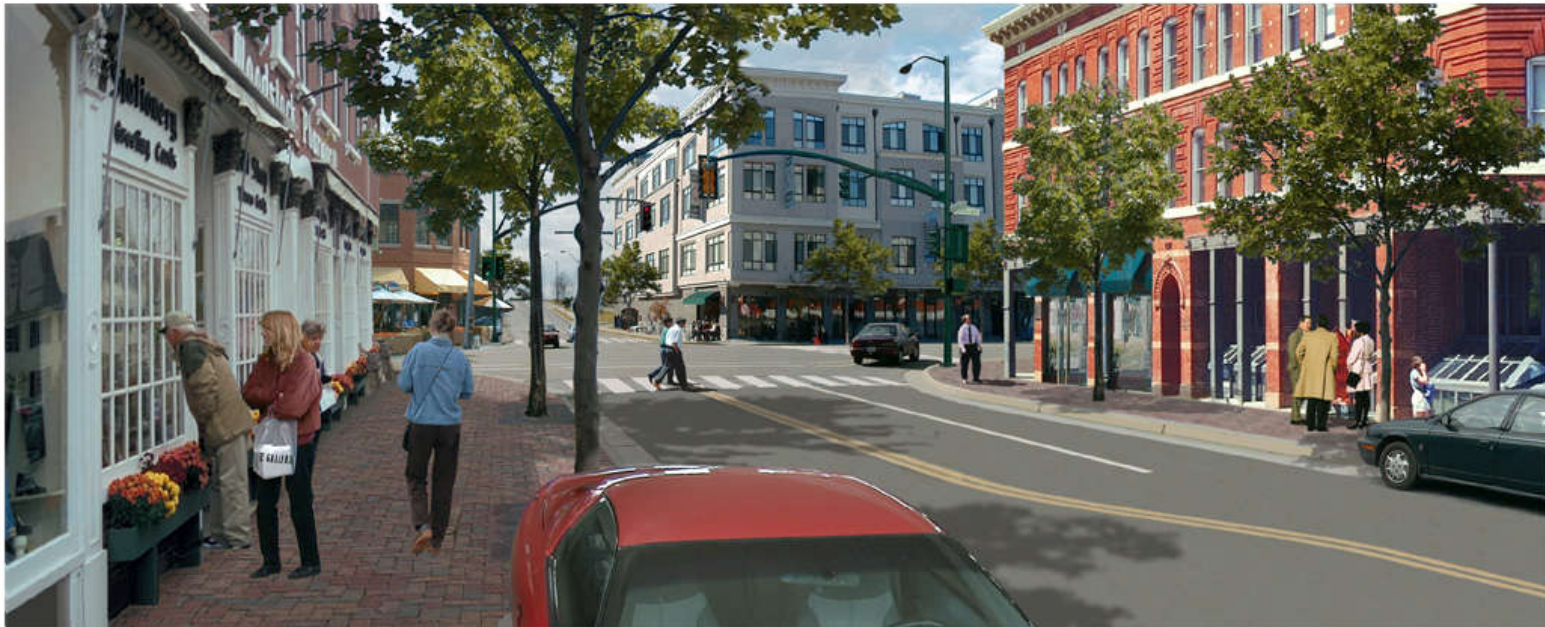
# Commercial Development



Ripple Effects







## Scenario A

### Past Trends

Develop in the same way as in the past

## Scenario B

### Planned Future

Develop according to community's plans

## Scenario C

### Focused Growth

Develop with some infill & redevelopment

## Scenario D

### Maximum Infill

Develop with maximum infill & redevelopment



**LAND  
CONSUMPTION**



**LOCAL  
FISCAL IMPACTS**



**TRANSPORTATION**



**PUBLIC  
HEALTH COSTS**



**BUILDING  
ENERGY USE**



**BUILDING  
WATER USE**



**GREENHOUSE  
GAS EMISSIONS**



**HOUSEHOLD  
COSTS**

# Land Consumption (cumulative)



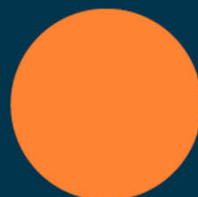
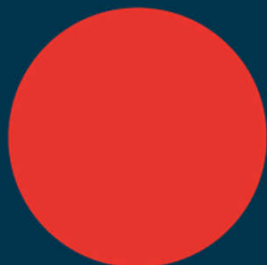
**LAND  
CONSUMPTION**

**495**  
square miles

**270**  
square miles

**45**  
square miles

**15**  
square miles



**A**

Past  
Trends

**B**

Planned  
Future

**C**

Focused  
Growth

**D**

Maximum  
Infill

# Local Fiscal Impacts (cumulative)



## LOCAL FISCAL IMPACTS

**\$16.4 billion**



**A**

Past Trends

**\$15.8 billion**



**B**

Planned Future

**\$13.2 billion**



**C**

Focused Growth

**\$13 billion**



**D**

Maximum Infill

\*Operations and maintenance

# Transportation (annual VMT)



## TRANSPORTATION

**A** Past Trends



**15.9**

billion vehicle miles traveled

**B** Planned Future



**15.4**

billion vehicle miles traveled

**C** Focused Growth



**12**

billion vehicle miles traveled

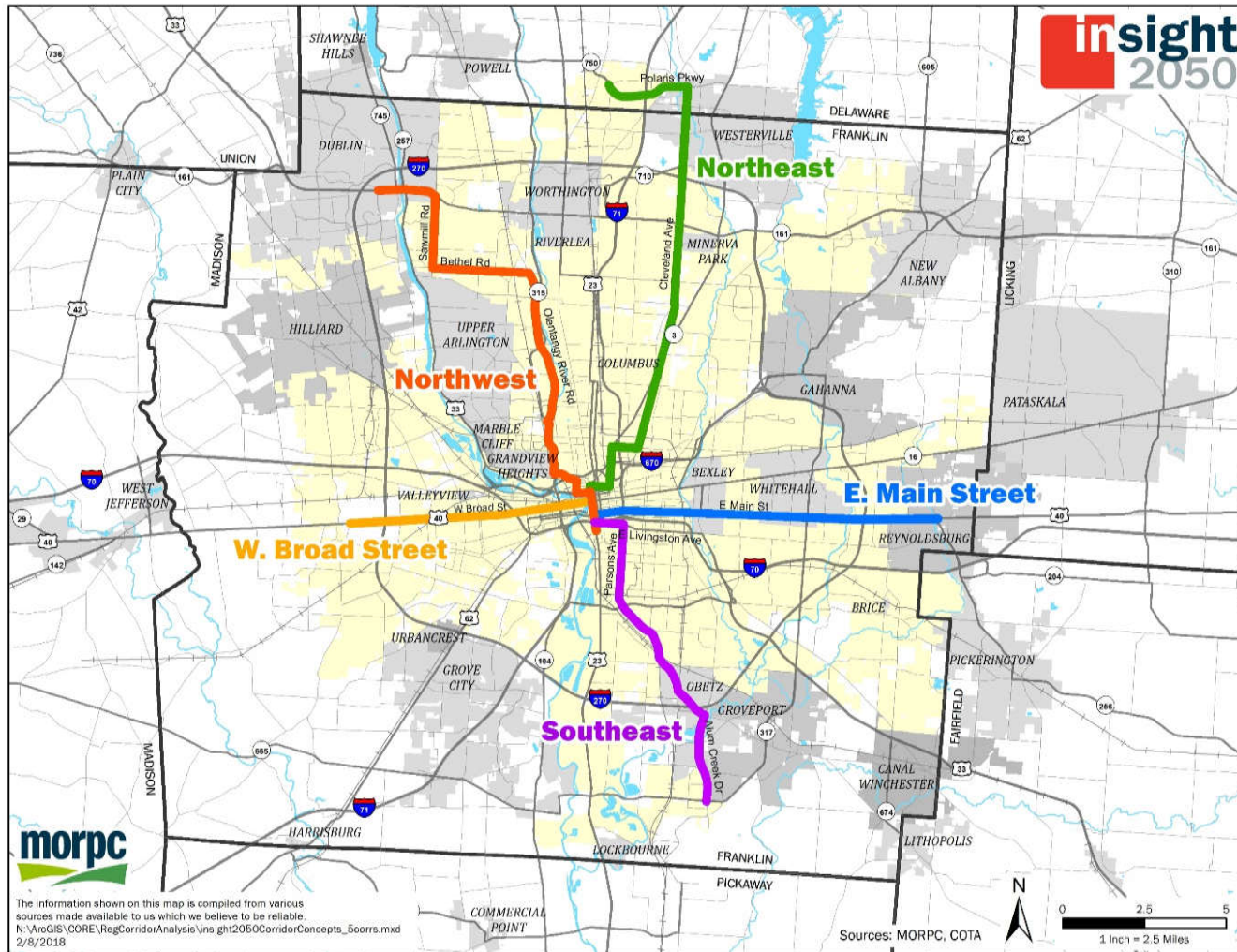
**D** Maximum Infill



**11.1**

billion vehicle miles traveled

# Corridor Concepts





# Partners



Mid-Ohio Regional  
Planning Commission



Mid-Ohio Regional  
Planning Commission



THE CITY OF  
**COLUMBUS**  
ANDREW J. GINTHER, MAYOR



THE COLUMBUS  
FOUNDATION



**COLUMBUS**  
PARTNERSHIP



**GRANDVIEW HEIGHTS**  
OHIO

# Consulting Team



Mid-Ohio Regional  
Planning Commission

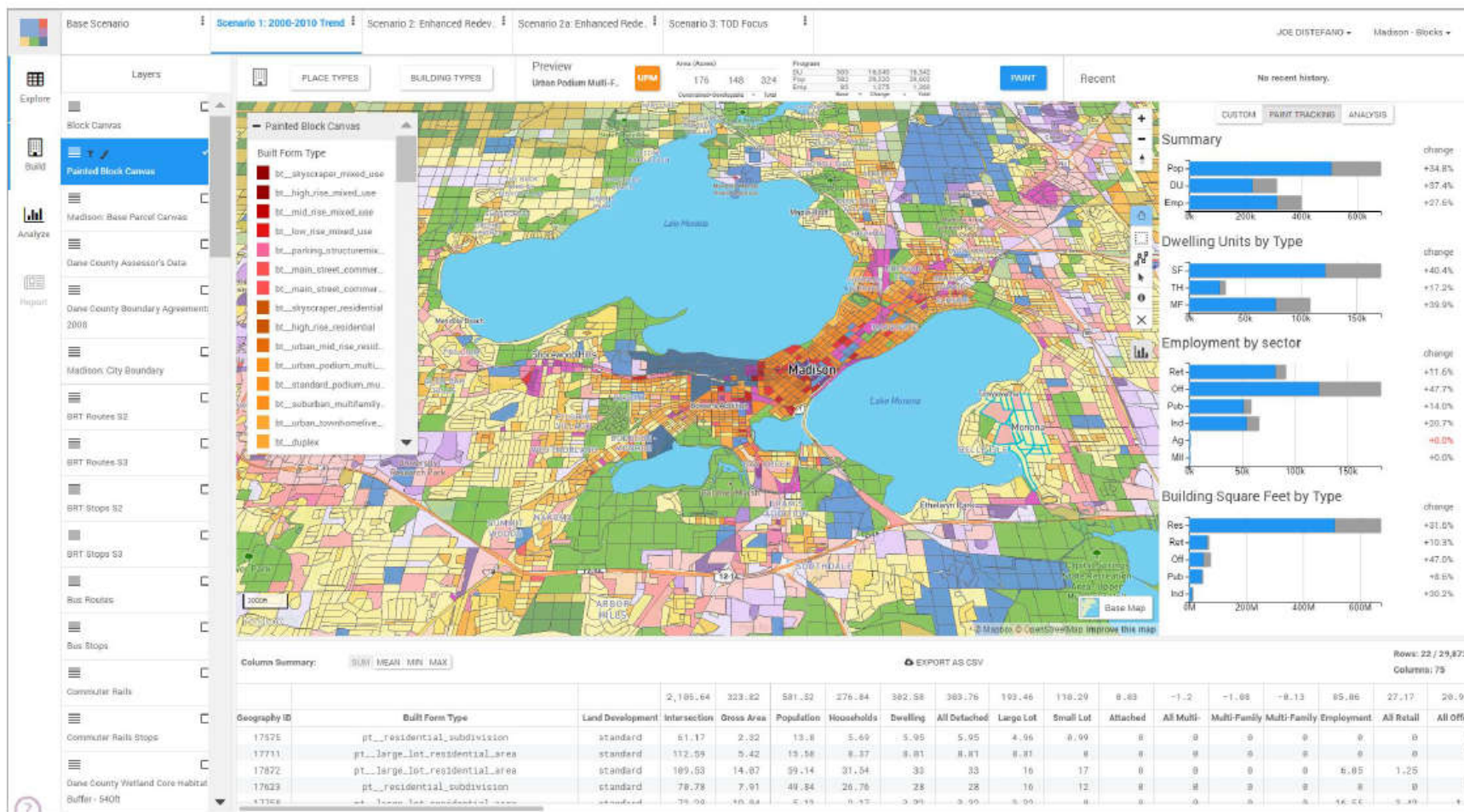


# Scenario Software



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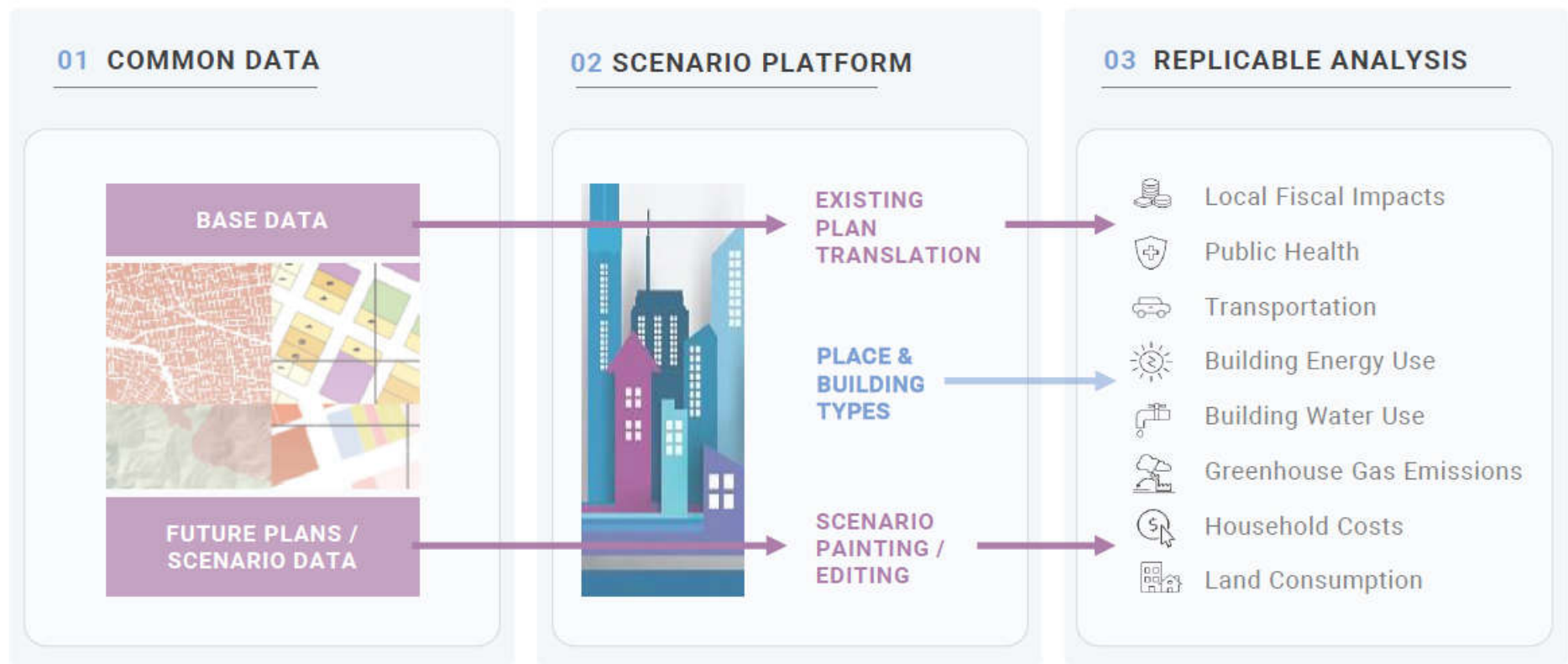
## URBAN FOOTPRINT



# Model & Evaluate Scenarios



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# Identify High-Capacity Transit



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## HIGH CAPACITY TRANSIT

... which moves more people, faster, in less physical space, attracts new development and focuses growth.



## SMART MOBILITY OPTIONS

... such as self-driving vehicles, first/last mile services, and smart apps, which makes planning and paying for transportation services and job access easier than ever.



## ENHANCED BUS SERVICE

... that runs more frequently, to more places—ensures residents can access jobs and employers can attract employees because transportation is accessible 24-hours a day.

# Stakeholder Engagement



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# FROM CONCEPTUALIZATION TO IMPLEMENTATION

## Definitions

- Affordable—targets households up to 60% of AMHI (Low-Income Housing Tax Credit program).
  - Low-Income (up to 50% of AMHI)
  - Very Low-Income (up to 30% of AMHI)
- Workforce—generally serves households with incomes at 60% to 80% of AMHI. Some define it as 60% to 100% of AMHI.
- Market-rate—market-rate housing generally serves households above 80% of AMHI.





# City Development Incentives

Category	Developer Benefits	Types of housing investment abated	Affordable housing requirement
<i>Market Ready</i>	100%, 15-year abatement with decreasing benefit starting in year 11	Mid-rise and high-rise multifamily projects. Single family rehabilitation.	10% of units affordable to and rented to households at or below 100% AMI  10% of units affordable to and rented to households at or below 80% AMI
<i>Ready for Revitalization</i>	100%, 15-year abatement	All multifamily and single family investment	Option 1: Provide affordable housing as in Market Ready  Option 2: Pay \$2,500 per unit to a community group working on affordable housing in the community  Option 3: Include an affordable housing group as a partner in the project
<i>Ready for Opportunity</i>	100%, 15-year abatement	All multifamily and single family investment	None



		<b>Persistently Disinvested</b>	<b>Ready for Revitalization</b>	<b>Market-Ready</b>	<b>Columbus Baseline</b>
<i>Demographics</i>	Population growth, 2000-2016	<b>Below</b> baseline	Can be <b>below or above</b> baseline, <i>depending on presence of vacant parcels awaiting redevelopment</i>	<b>Above</b> baseline	+19%
	Median household income growth, 2000-2016	Significantly <b>below</b> baseline	Ideally, <b>at or above</b> baseline	<b>Above</b> baseline	+17%
	Poverty rate, 2015	Significantly <b>above</b> baseline	Can be <b>above or below</b> baseline, <i>depending on concentrated, persistent poverty</i>	<b>Below</b> baseline	21%
<i>Residential Market Demand</i>	Median rent growth PSF, 2010-2017	<b>Below</b> baseline	<b>Above</b> baseline	<b>Above</b> baseline	+19%
	Housing vacancy rate, 2015	<b>Above</b> baseline	Can be <b>below or above</b> baseline, <i>depending on presence of vacant parcels awaiting redevelopment</i>	<b>Below</b> baseline	11%
<i>Foreclosure Activity</i>	Mortgage foreclosure rate: # of foreclosures per 10,000 homes, 2017	<b>Above</b> baseline	Ideally, <b>below</b> baseline	<b>Below</b> baseline	3.2





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## Rental Affordability Defined by Income and Household Size

HUD annually provides an estimate of area median household income for a family of four. For 2017, the median household income was estimated to be \$74,500 (an increase of 7.0% over 2016).

Incomes are adjusted for household size to establish maximum rents.



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## Maximum Collected Rents by AMHI for the Columbus MSA\*

Bedroom Type	60% Affordable	80% Workforce	100% Market-Rate	120%
Studio	\$700	\$970	\$1,230	\$1,490
One	\$750	\$1,030	\$1,300	\$1,590
Two	\$900	\$1,230	\$1,570	\$1,900

\*Based on a 30% of income to rent ratio



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# Maximum Collected Rents Compared to Downtown/Short North

Bedroom Type	60%	80%	100%	Downtown Short North Median Collected Rent
Studio	\$700	\$970	\$1,230	\$950
One	\$750	\$1,030	\$1,300	\$1,340
Two	\$900	\$1,230	\$1,570	\$1,830



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## 2017 Income Limits

Household Size	60%	80%	100%
One	\$31,260	\$41,650	\$52,100
Two	\$35,760	\$47,600	\$59,600
Three	\$40,200	\$53,550	\$67,000



**PIZZUTI**

Broadway Station, Grove City



**PIZZUTI**

Creekside 16, Obetz





**PIZZUTI**

40 West First Ave, Columbus



PIZZUTI

881 N. High Street, Columbus



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