Housing Market Detailed Analysis
City of Upper Arlington

May 2025

City *of* **Upper Arlington**

CommunityScale

Contents

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Executive summary

This is a detailed analysis of Upper Arlington's housing market to provide data-driven insights into housing affordability, availability, and long-term trends. The study focuses on understanding the city's current housing stock, demographic changes, and economic factors that impact residents and housing development.

Executive summary

The information in this detailed housing market analysis is intended for the City to evaluate policies and programs that seek to grow the City responsibly and increase housing options for residents, whether they are forming a new household in Upper Arlington, entering as a new resident, or looking to remain in Upper Arlington through various life stages.

This study provides a review of demographic trends, comparable communities, regional influences, and a quantitative deep dive into issues that shape the housing market. The analysis is grounded by interviews with stakeholders such as single-family and multifamily housing developers, regional and local government staff, and housing advocates, as well as an online survey with more than 700 responses.

3181 Northwest Blvd - The Kingston

In summary, the following conditions and trends are expected to shape the housing market in and around Upper Arlington through 2050:

1. **Ongoing Regional Growth:** MORPC's Metropolitan Transportation Plan forecasts Central Ohio to continue strong growth. Additional growth will be driven by job creation from mega-projects at Intel, Honda-LG, and advanced defense manufacturing, along with ongoing in-migration. Upper Arlington's housing market could absorb 57 housing units per year through 2050. If the City doesn't add housing at the regional growth rate, residents will see price escalation exceeding regional and national norms. As a predominantly build-out and land-locked community, realizing this 9.8% growth in housing units over the next 25 years will require an intensification of land use, such as redeveloping low density commercial to have housing on upper stories and allowing replacement of single-family housing with duplexes, quadplexes, and townhomes.

2. **Upper Arlington's Strong Market Position:** Higher-income families attracted by the community's quality of life have a high willingness-to-pay for new housing in Upper Arlington. The median household income in the City is high and has been growing, putting it on par with communities like Dublin and Bexley, Ohio. The median income surpasses notable national communities such as Carmel, IN, Fairfax, VA, and Oak Park, IL. Due to high demand and constraints on housing production, Upper Arlington's ownership and rental vacancy rates are less than what is considered healthy for a market, leading to pent-up demand and households not forming.

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3. **Addressing Housing Needs Across Life Stages:** Upper Arlington has successfully attracted families but faces challenges retaining young adults (ages 20-34) and empty nesters (ages 50-64) due to limited suitable housing options. Both empty nesters and younger professionals demonstrate preference walkable, urban-style living environments. This preference was echoed in this study's Housing Market Survey with more than 700 responses. Most responders would prefer houses with small yards within an easy to walk to places you need to go. Increasing housing diversity, including multifamily, mixed-use, and senior independent living facilities with supportive services will help retain these demographics. Given the rate of older adults in the community and their likelihood of downsizing into a new unit, an estimated 145 new senior living units could easily be absorbed by growth in the market without addressing pent up demand from existing residents.

Thrive Quarry Trails, Columbus

4. **Development Economics for New Ownership Properties:** High construction costs ($200-$300 per sq ft), coupled with rising land prices ($1.3M per acre median for lots that have been redeveloped in the last 5 years), have led to market prices for new homes well above the median income of residents. Single-family home redevelopment typically results in sale prices exceeding $1M even for smaller homes on smaller lots. The cost of larger single-family homes on larger lots is variable due to differences in land costs, but similarly are typically delivered at a market price of at least $1.8M.

5. **Development Economics for New Large Rental Properties:** Financial feasibility is driven by market rent, annual return on investment ("cap rate"), and construction costs. Market rents are competitive with the region and are around $2,250 for a 900 sq ft apartment, which is affordable to a household earning $98,000 a year. In Upper Arlington, that unit is likely to be suitable for a younger household, downsizing seniors, or empty nester. To achieve viability given land prices of about $2M per acre along with other costs, the economic model estimates that large scale rental developments would require subsidies averaging $79K per unit, which includes support for structured parking needed to reach higher density. Looking ahead, the such subsidy rates are consistent with incentives being offered by the City of Columbus and some other jurisdictions to encourage denser, mixed use development and redevelopment.

EXECUTIVE SUMMARY

6. **Incentivizing Large Scale Redevelopment:** As discussed, large scale redevelopment currently requires public support to be financially viable. Furthermore, Upper Arlington competes for developers with nearby Columbus on subsidy amounts. For example, if two otherwise equal redevelopment opportunities were on the Upper Arlington and Columbus sides of Henderson Road, developers expressed that they would choose to build in Columbus due to the generous incentives offered in the form of long-term tax abatements.

1600 W Lane Ave - The Lane

7. **The Need to Balance of Revenue and Cost of City Services Per Unit:** New homes in Upper Arlington generate municipal revenue exceeding service costs, thus providing a net positive impact on municipal finances. The break-even assessed value per unit is approximately $619K, current market values for new construction easily surpass. The marginal cost to serve a new home in Upper Arlington is a function of services that need to scale with new demand but are not inherently covered by their own fees. Police, fire, EMS, and Parks and Recreation are funded by the City's general revenue, whereas other services like waste, water, and sewer are covered by fees connected to those services. These expenses are then balanced by revenues from property tax, income tax for work-from-home, and ongoing revenue positive building permit fees for redevelopment and renovation.

8. **Economies of Scale Help with Municipal Finance:** As cities grow, the cost of providing essential services per household decreases because the new homes leverage existing infrastructure and distribute expenses such as police, fire protection, and parks across more households. More precisely, the relationship between growth and overall expenses is nonlinear as cities achieve 15% efficiency gains in infrastructure and service provision. Larger cities can provide essential services like police, fire protection, and parks at a lower per-unit cost due to these economies of scale. For Upper Arlington, a 9.8% increase in housing units from 2025-2050 as forecasted by MORPC's Metropolitan Transportation Plan would only require about 8.2% additional resources. This economy of scale effectively reduces the break even point for revenue from new homes for Upper Arlington.
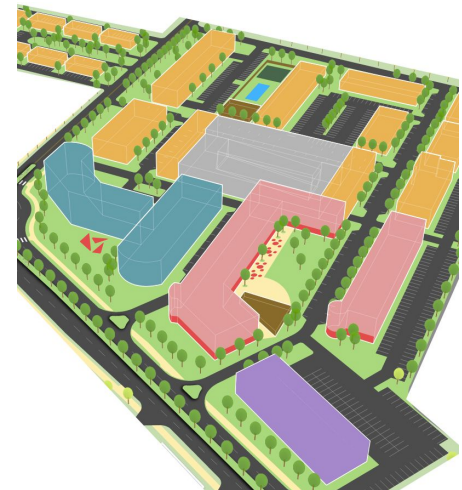
EXECUTIVE SUMMARY

The analysis reveals key trends and economic realities shaping Upper Arlington's housing landscape. With these insights as a foundation, the following **opportunities for further study** offer targeted strategies to achieve the City's goals:

A. **Explore areas where allowing neighborhood-scale density will create new housing opportunities:** Adjusting allowable density in regulations would improve housing attainability by creating options for organic, locally-led infill market rate development without financial subsidies. For example, applying the same single-family development economics to a quadplex on a half-acre lot could achieve sales prices around $770K per 1,500 sq ft unit. This option would offer more attainable housing solutions across life stages while also contributing to overall municipal revenue. During stakeholder interviews, local builders expressed their support for regulatory adjustments to encourage more housing options, particularly along primary corridors.

London Court Condos developed in 2015

B. **Support Senior Housing:** Upper Arlington should continue to pursue a multifamily approach to senior housing that encompasses both a basic independent living model and an enhanced service offering. The City is encouraged to support projects designed to meet diverse income levels and service needs and integrate amenities such as senior-centric commercial spaces, community centers, and structured parking. This strategy would enable one or two larger-scale developments to effectively address a decade's worth of potential downsizing needs within the community.

C. **Large-Scale Multifamily as a Component of Transformational Redevelopment:** The City should cultivate opportunities and time the market to seize the benefits of co-locating rental housing with commercial uses in transformation mixed-use projects, such as the successful collaboration with The Kingston and the Community Center. For example, the Envision Henderson plan (shaped by input from over 900 residents) demonstrates how multifamily can effectively complement new office, streetscape enhancements, and open space amenities. With multifamily as a core element of a holistic redevelopment strategy, the City can create much needed market-rate rental housing, a walkable environment, and expanded tax revenue from integrated commercial development.

Envision Henderson (draft) showing attached townhomes and multifamily buildings within a transformational mixed-use redevelopment

Comparison Communities

Upper Arlington compared to other Ohio and nationally similar communities

COMPARISONS

Upper Arlington's Comparison Communities

Source: 2010 - 2023 ACS 5-Year, CommunityScale

Comparable communities help market studies by providing benchmarks on key metrics such as growth, demographics, and income across areas with similar socioeconomic or geographic characteristics. In this case, each community was chosen for its relevance in size, regional context, and overall demographic profiles, allowing for a meaningful comparison of trends and conditions.

| Households	Household growth 2010-2023	65+ households	Median household income	Vacant units	
38,160	36.17%	25.98%	$138,640	5.72%	Carmel, IN
27,210	11.17%	26.48%	$144,850	5.18%	Brookline, MA
23,267	6.06%	28.21%	$111,267	5.70%	Oak Park, IL
17,797	25.84%	24.56%	$159,940	3.39%	Dublin, OH
14,389	**8.29%**	**33.73%**	**$155,523**	**4.85%**	**Upper Arlington, OH**
13,029	14.39%	36.76%	$100,653	8.28%	Shaker Heights, OH
10,054	-1%	34.21%	$110,894	2.42%	Prairie Village, KS
9,158	7.44%	27.29%	$136,757	1.71%	Fairfax, VA
6,064	9.72%	34.14%	$128,476	4.68%	Worthington, OH
4,581	4.28%	28.73%	$157,102	6.76%	Bexley, OH

Inflation-adjusted median household income

Source: 2010 - 2023 ACS 5-Year, CommunityScale

Median household income in Upper Arlington rose faster over the last 10 years compared to similar communities.
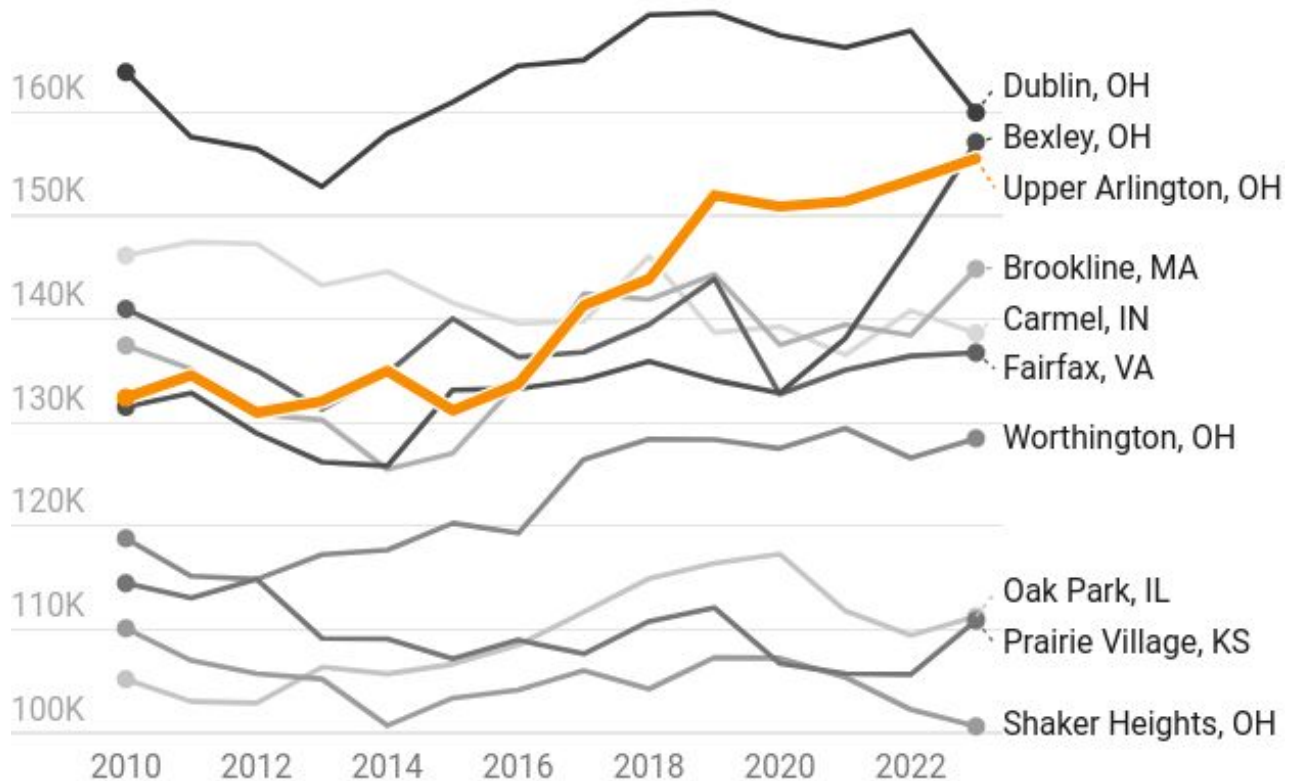
$159,940 Dublin, OH

$157,102 Bexley, OH

$155,523 Upper Arlington, OH

$144,850 Brookline, MA

$138,640 Carmel, IN

$136,757 Fairfax, VA

$128,476 Worthington, OH

$111,267 Oak Park, IL

$110,894 Prairie Village, KS

$100,653 Shaker Heights, OH

**Inflation-adjusted median household income**

COMPARISONS

Percent household growth since 2010

Source: 2010 - 2023 ACS 5-Year, CommunityScale

At 8% household growth since 2010, Upper Arlington is in the middle of the pack.

36.17% Carmel, IN
25.84% Dublin, OH
14.39% Shaker Heights, OH
11.17% Brookline, MA
 9.72% Worthington, OH
 8.29% Upper Arlington, OH
 7.44% Fairfax, VA
 6.06% Oak Park, IL
 4.28% Bexley, OH
   -1% Prairie Village, KS

Percent household growth since 2010
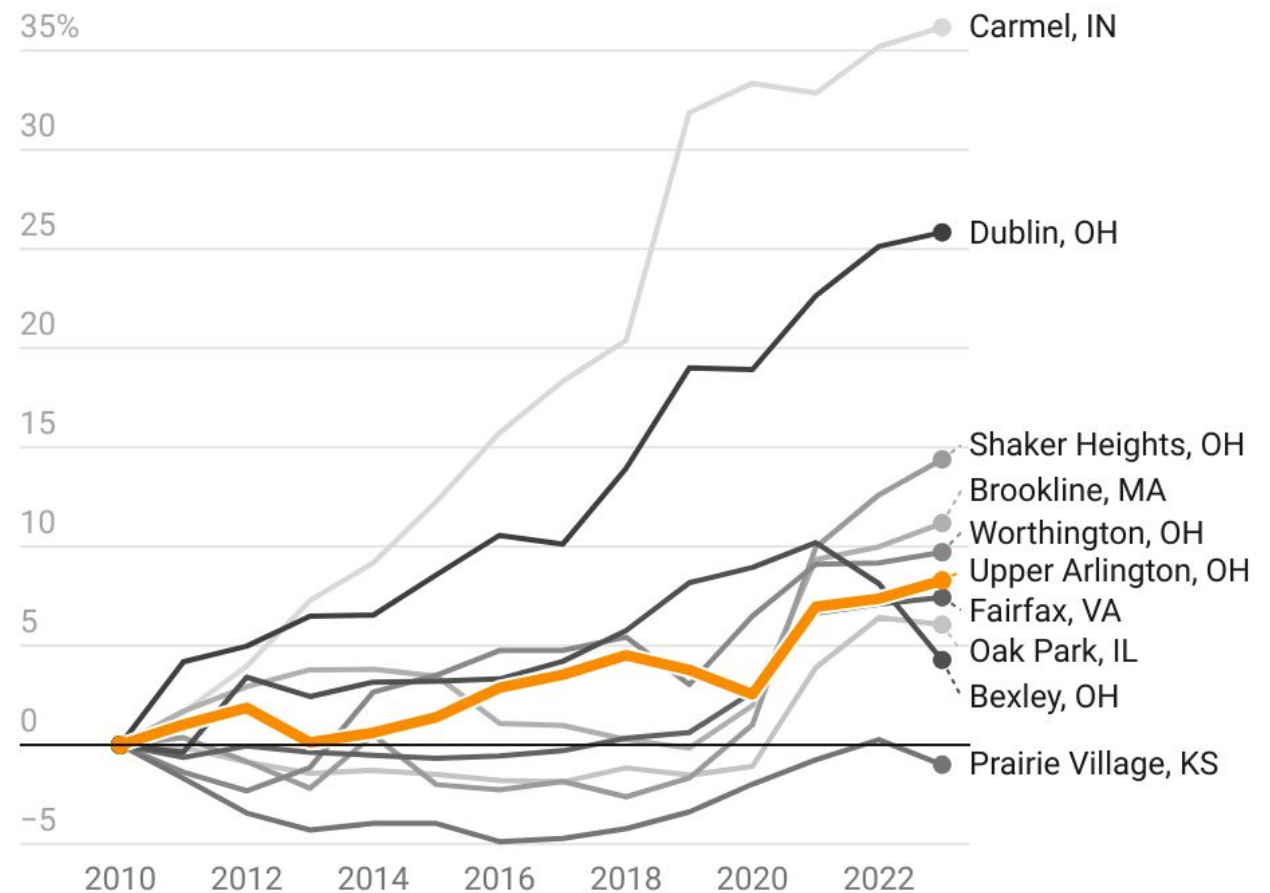
COMPARISONS

Percent of residents 18 and under

Source: 2010 - 2023 ACS 5-Year, CommunityScale

The share of households with someone who is 18 years or younger in Upper Arlington has been steadily rising for the last 10 years. Compared to similar communities, Upper Arlington has the most households with children.

27.61% Upper Arlington, OH
27.45% Dublin, OH
27.33% Bexley, OH
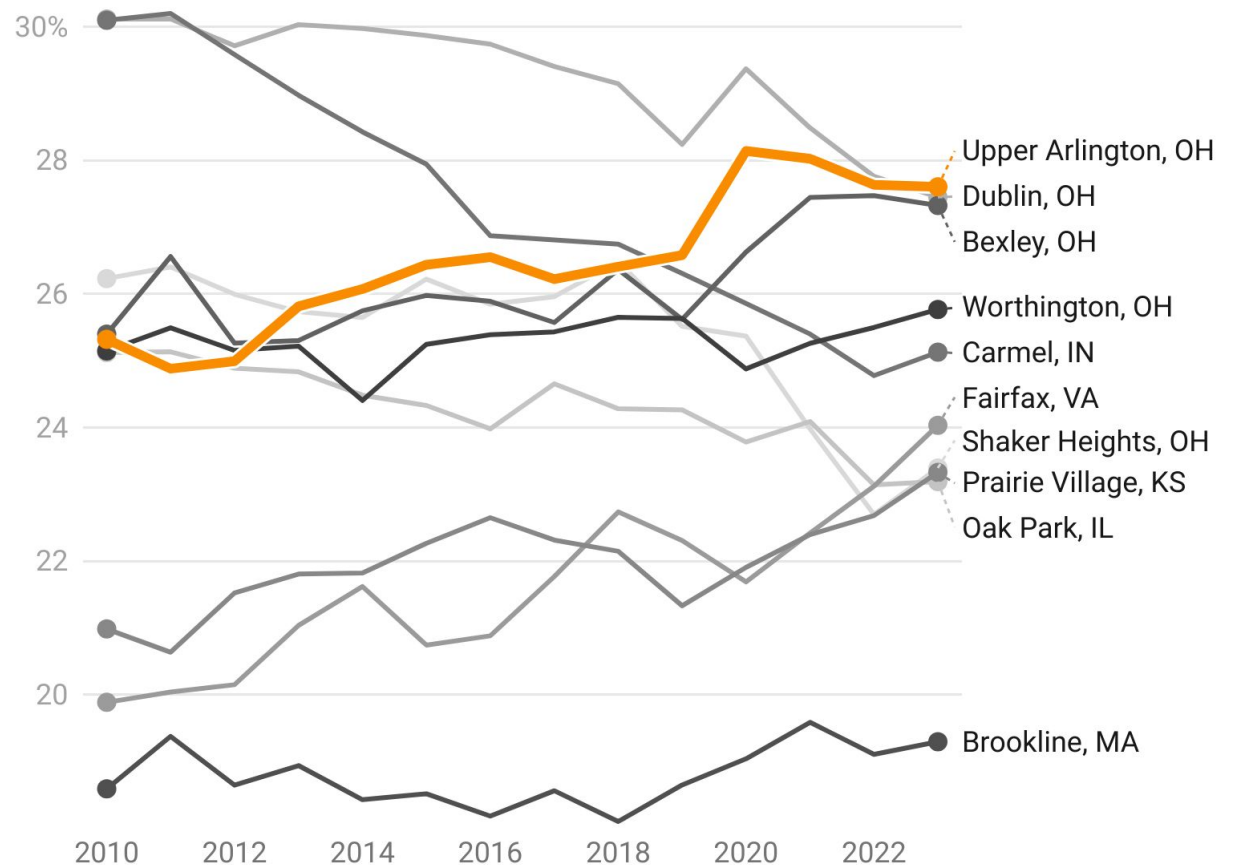25.77% Worthington, OH
25.13% Carmel, IN
24.03% Fairfax, VA
23.39% Shaker Heights, OH
23.33% Prairie Village, KS
23.19% Oak Park, IL
19.29% Brookline, MA

Percent of residents under 18

COMPARISONS

Percent of householders over 65 years old

Source: 2010 - 2023 ACS 5-Year, CommunityScale

The share of households with someone who is 65 years or older in Upper Arlington has been steadily rising for the last 10 years. Compared to similar communities, Upper Arlington generally has an older population with one-third of households falling into this category.

36.76% Shaker Heights, OH
34.21% Prairie Village, KS
34.14% Worthington, OH
33.73% Upper Arlington, OH
28.73% Bexley, OH
28.21% Oak Park, IL
27.29% Fairfax, VA
26.48% Brookline, MA
25.98% Carmel, IN
24.56% Dublin, OH

Percent of householders over 65 years old

Percent vacant homes

Source: 2010 - 2023 ACS 5-Year, CommunityScale
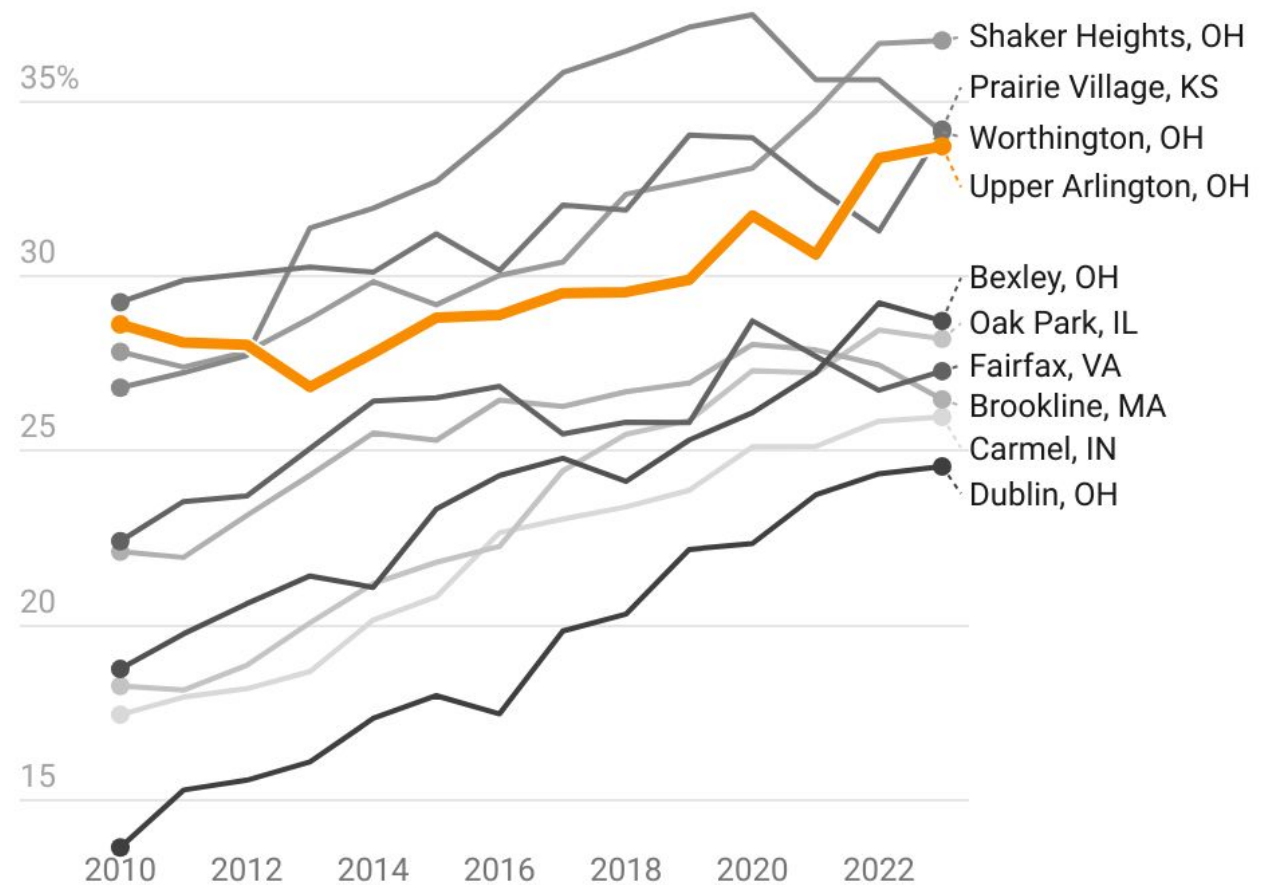
Unlike other communities, the vacancy rate in Upper Arlington has held steady between 4-5% since 2018. According to the Census, vacant homes include homes without permanent residents, second homes, seasonal homes, unrented homes, homes that have been rented or sold but are awaiting occupancy, and unoccupied homes under renovation.

8.28%	Shaker Heights, OH
6.76%	Bexley, OH
5.72%	Carmel, IN
5.70%	Oak Park, IL
5.18%	Brookline, MA
4.85%	**Upper Arlington, OH**
4.68%	Worthington, OH
3.39%	Dublin, OH
2.42%	Prairie Village, KS
1.71%	Fairfax, VA

Percent vacant homes

People & Place

Baseline setting on existing population, housing stock, and demographic trends

2.51	Average people per household
$109,000	Columbus HUD Area median income (2025)
$155,523	Upper Arlington median income (2025 est.)
14,665	Households (2025 est.)
15,122	Housing units
83%	Single-family detached structures
$597,535	Median home price (March 2025 Zillow)
40.6	Median age

ANALYSIS

Upper Arlington is predominantly detached single-family, with some denser housing for rent

Source: ACS 5-year, 2023. Upper Arlington.

This graph inventories the local housing stock in terms of each unit's structure type, a characteristic defined as the number of units in the building that contains a given unit.

Households may have different structure type preferences depending on characteristics such as household size, income, employment, presence of children, age of individuals, and lifestyle choices. Understanding the housing stock in corresponding terms helps assess how well existing units align with existing households' ideals.

Existing units by structure type

Legend:
- Detached single-family
- Attached single-family and 2-4 unit multi-family
- 5-49 unit multi-family
- 50+ units
- Other

Category	Units
Owner	11,383
Renter	3,006
Vacant	733
Total	15,122

Axis: 0, 5,000, 10,000, 15,000
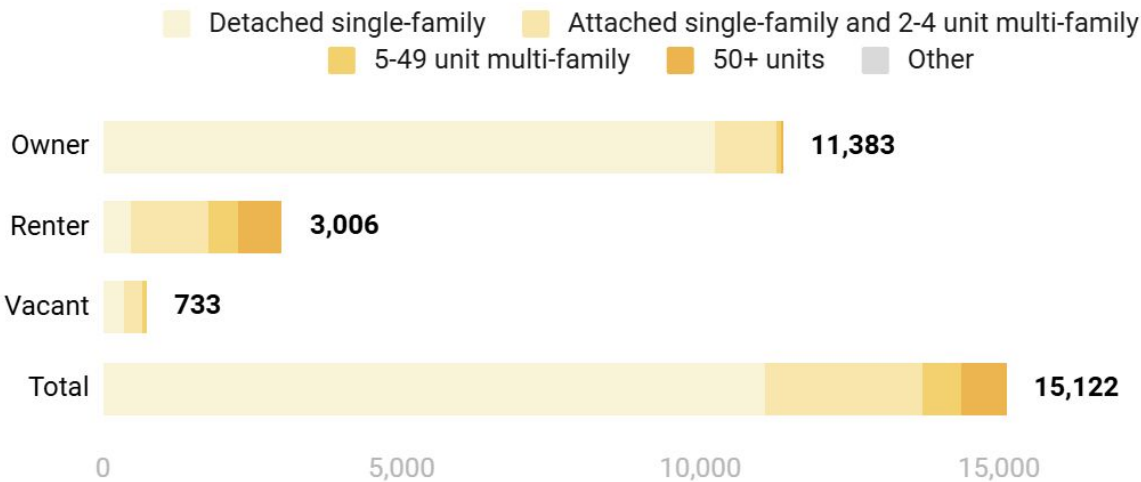
Households in the region are moving into all types of housing structures across all income groups

Sources: Census ACS 2023 5-Year. Columbus HUD Area median income. Regional preference model for recent movers by income group.

Given the variety of housing structure types available, it is important to consider how demand is distributed across the primary categories.

In general, lower-income households are more likely looking for multifamily and attached single family options whereas higher-income households are more likely looking for detached single family.

Importantly, however, there is significant demand for all structure types at all income levels, suggesting a full range of options are needed across price points.

Housing demand by structure type and income level

Legend: 50+ MF | 5-49 unit MF | Attached SF & 2-4 unit MF | Detached SF

Percent of Columbus HUD Area median income

Categories: <50% | 50%-80% | 80%-120% | 120%-150% | 150%-190% | >190%
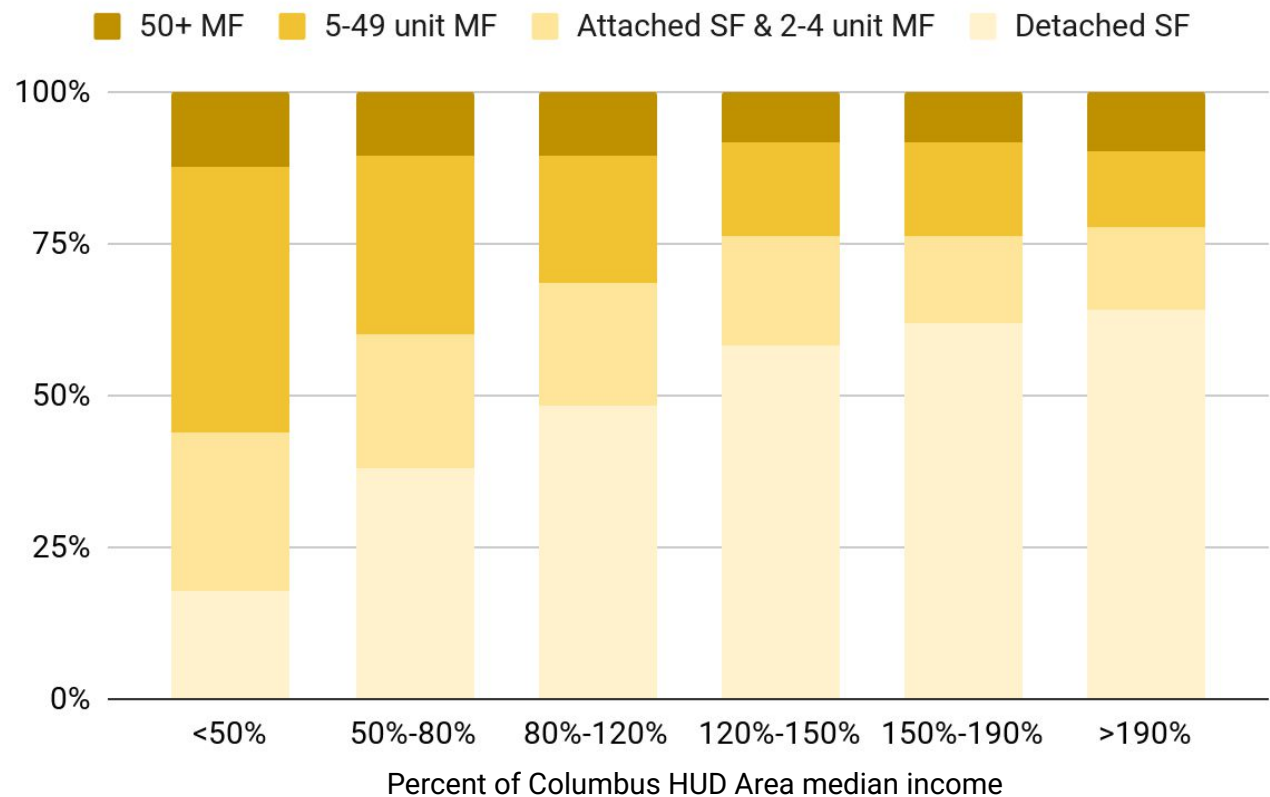
Existing units by bedroom count

Source: ACS 5-year, 2023. Upper Arlington.

This graph inventories the local housing stock in terms of bedroom count by unit by tenure. The majority of Upper Arlington's housing units are three bedrooms and more, with no ownership studios or one bedrooms recognized in 2023.

Household size and the presence of children are primary drivers for bedroom count with, as expected, larger families desiring more bedrooms than smaller households. However, other factors such as income and the incremental cost of extra bedrooms also influence these preferences.

Existing units by number of bedrooms

Legend: 0-1 bed | 2 beds | 3 beds | 4+

Category	Value
Owner	11,383
Rental	3,006
Vacant	733
Total	15,122

X-axis: 0, 5,000, 10,000, 15,000, 20,000
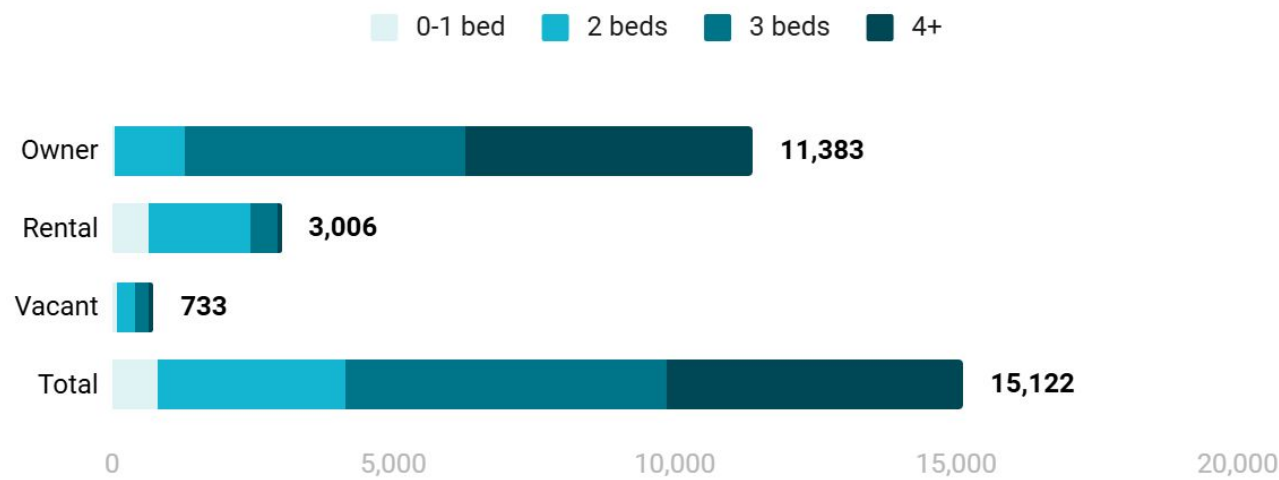
Family structure and change over time

Sources: Census ACS 2023 5-Year. Upper Arlington.

Upper Arlington experienced notable shifts in family structures with a significant increase in married-couple families with children under 18. There was also growth in single-person households and seniors living alone.

Change in family structure since 2015

Legend: ■ 2015 ■ 2023

Category	2015	2023
Adults living with parents	1,973	1,580
Adults living with nonrelative roommates	846	681
Married couple families with children under 18	3,554	4,430
Single parents with children under 18	903	599
Single person households	3,467	3,851
Seniors living alone	1,487	1,995
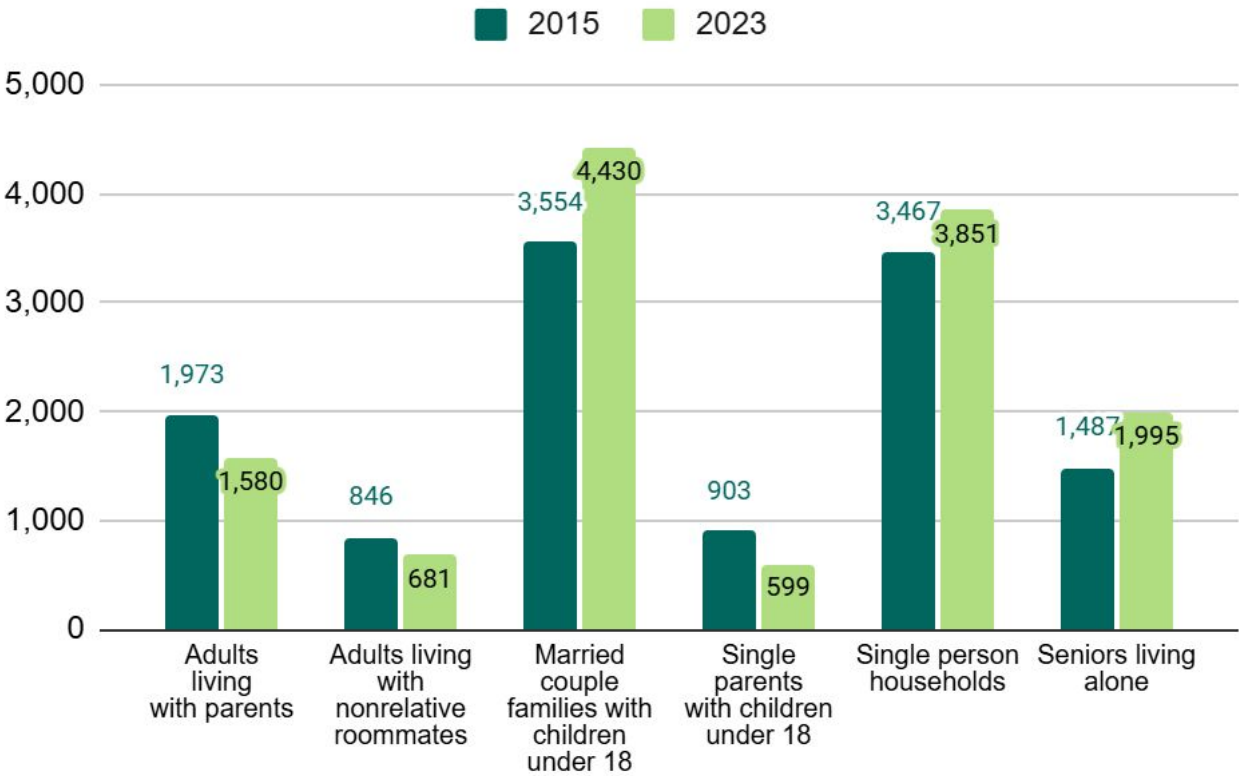
ANALYSIS

Employment and wages

Median wages for Franklin County, OH compared to Upper Arlington's area median income (AMI) for households with a single earner and households assuming double income of the same job type.

Though technically more of a bedroom community than a job center, Upper Arlington has a somewhat balanced jobs/workers mix. However, a very small portion of people both live and work in town.

People who live here	18,114
People who work here	12,929
People who live and work here	1,337
Of total people who live here	7.4%
Of total people who work here	10.3%

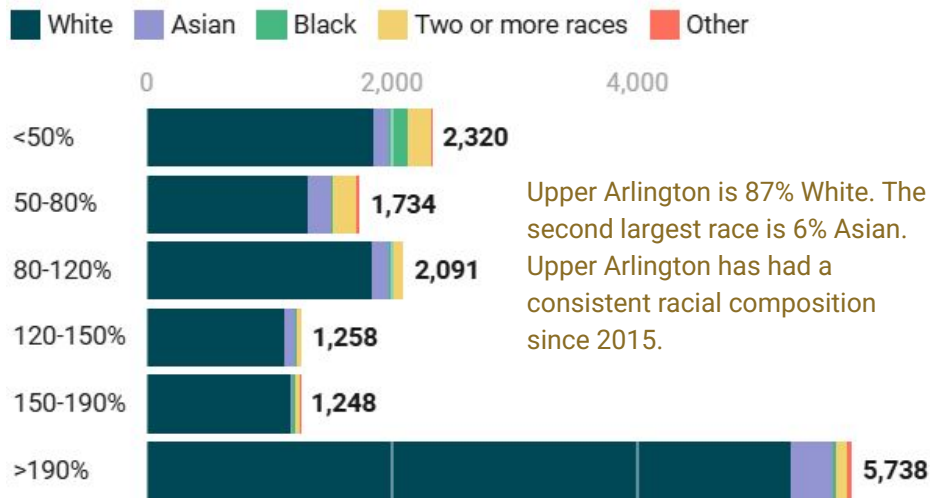| Occupation	Median wage (adjusted to 2025 dollars)	Single earner AMI	Two earner AMI
Food preparation and serving related	$20,573	20%	40%
Personal care and service	$23,198	22%	45%
Farming, fishing, and forestry	$26,000	25%	50%
Building and grounds cleaning and maintenance	$30,623	30%	59%
Healthcare support	$31,080	30%	60%
Material moving	$32,969	32%	64%
Firefighting and prevention	$38,114	37%	74%
Production	$42,478	41%	82%
Transportation	$43,740	42%	85%
Office and administrative support	$43,803	42%	85%
Sales and related	$43,969	43%	85%
Construction and extraction	$45,472	44%	88%
Health technologists and	$50,286	49%	97%
Arts, design, entertainment, sports, and media	$50,597	49%	98%
Educational instruction, and library	$51,165	50%	99%
Installation, maintenance, and repair	$54,286	53%	105%
Community and social service	$56,874	55%	110%
Life, physical, and social science	$60,241	58%	117%
Business and financial operations	$76,175	74%	147%
Law enforcement	$77,954	75%	151%
Health diagnosing and treating practitioners	$78,604	76%	152%
Management	$83,008	80%	161%
Legal	$86,074	83%	167%
Architecture and engineering	$92,061	89%	178%
Computer and mathematical	$94,753	92%	183%

Household characteristics by income group

Sources: Census ACS 2023 5-Year. Columbus HUD Area median income. Upper Arlington characteristics.

Race

Legend: ■ White ■ Asian ■ Black ■ Two or more races ■ Other

Income	Value
<50%	2,320
50-80%	1,734
80-120%	2,091
120-150%	1,258
150-190%	1,248
>190%	5,738

Upper Arlington is 87% White. The second largest race is 6% Asian. Upper Arlington has had a consistent racial composition since 2015.

Household type

Legend: ■ Family with children ■ Family without children ■ Nonfamily

Income	Value
<50%	2,319
50-80%	1,734
80-120%	2,091
120-150%	1,258
150-190%	1,249
>190%	5,738

Families with children are more likely in the highest AMI category (>120%), while lower AMI categories (<30% and 30-60%) have a higher concentration of nonfamily households.

Age of householder

Legend: ■ <25 ■ 25-44 ■ 45-64 ■ >65

Income	Value
<50%	2,320
50-80%	1,734
80-120%	2,092
120-150%	1,258
150-190%	1,248
>190%	5,738

Number of earners

Legend: ■ 0 earners ■ 1 earner ■ 2 earners ■ 3+ earners

Income	Value
<50%	2,319
50-80%	1,734
80-120%	2,090
120-150%	1,258
150-190%	1,249
>190%	5,738

Cost burdened households are concentrated in the lower income groups

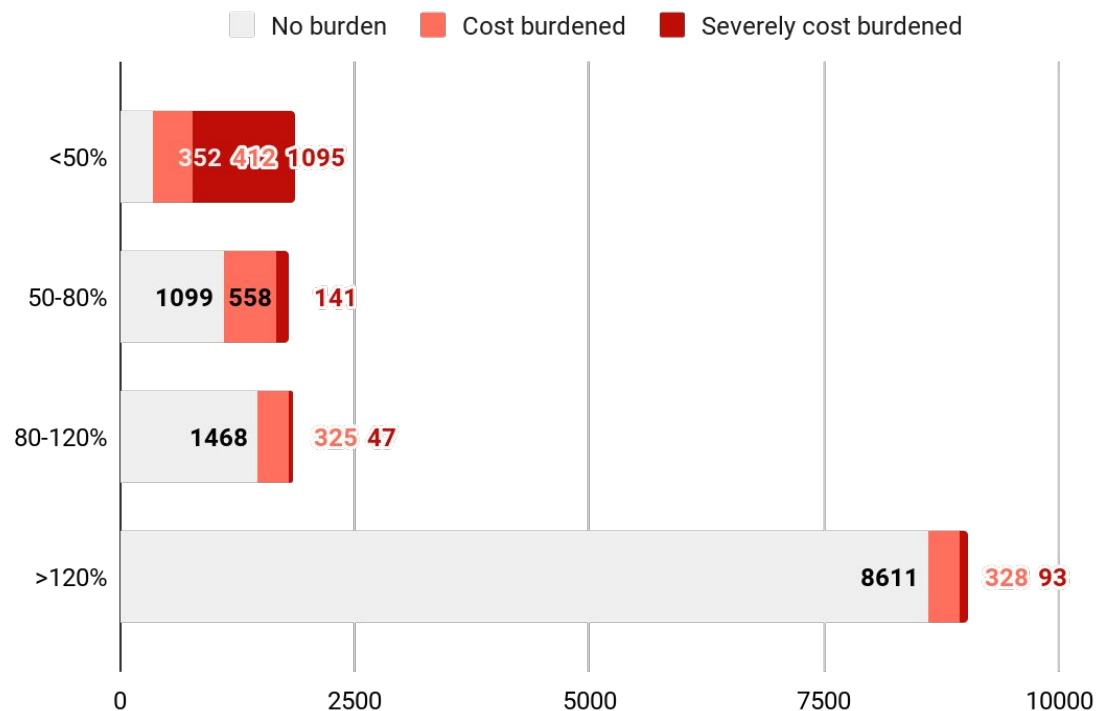Source: 2023 ACS 5-Year. Columbus HUD Area median income. Upper Arlington characteristics.

Households are cost burdened when paying more than 30% of their income on housing costs. They are considered severely cost burdened when these costs exceed 50% of their income. For renters, this includes lease rent and utilities. For homeowners, this includes mortgage costs, property taxes, insurance, utilities, and any condo fees.

According to Census research, approximately 60% of HUD Housing Choice Voucher and state voucher recipients report their contract rent, which results in an overestimate of cost burden among lower income households. There are only about 13 households receiving that type of subsidy in Upper Arlington, so the degree of overestimation is low.

Number of households in each AMI group, by cost burden

Legend: No burden | Cost burdened | Severely cost burdened

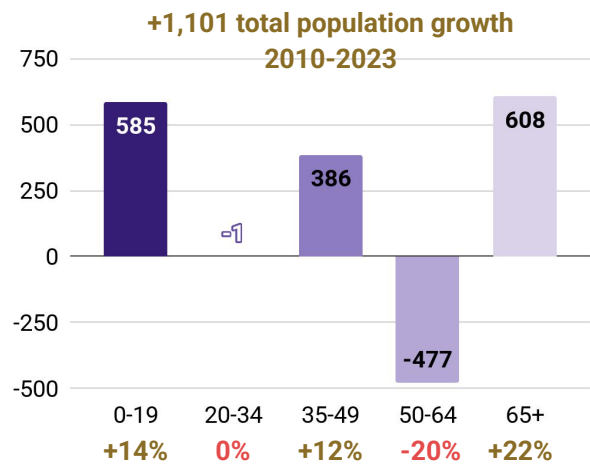| AMI group	No burden	Cost burdened	Severely cost burdened
<50%	352	412	1095
50-80%	1099	558	141
80-120%	1468	325	47
>120%	8611	328	93

(x-axis: 0, 2500, 5000, 7500, 10000)

Upper Arlington has a growing share of families

Source: ACS 5-Year. Upper Arlington characteristics.

Population change 2010-2023

+1,101 total population growth 2010-2023

Age	Change	Percent
0-19	585	+14%
20-34	-1	0%
35-49	386	+12%
50-64	-477	-20%
65+	608	+22%

Between 2010 and 2023, Upper Arlington's population grew by 1,101 individuals. That growth has been exclusively in the 0-19, 35-49, and 65+ age ranges. The 20-34 age range has remained constant, but as a share of Upper Arlington's population the group is diminished. The 50-64 age group shrank by 477 individuals.

Population by age cohort trends and forecast

Legend: 65+, 50-64, 35-49, 20-34, 0-19

FORECAST
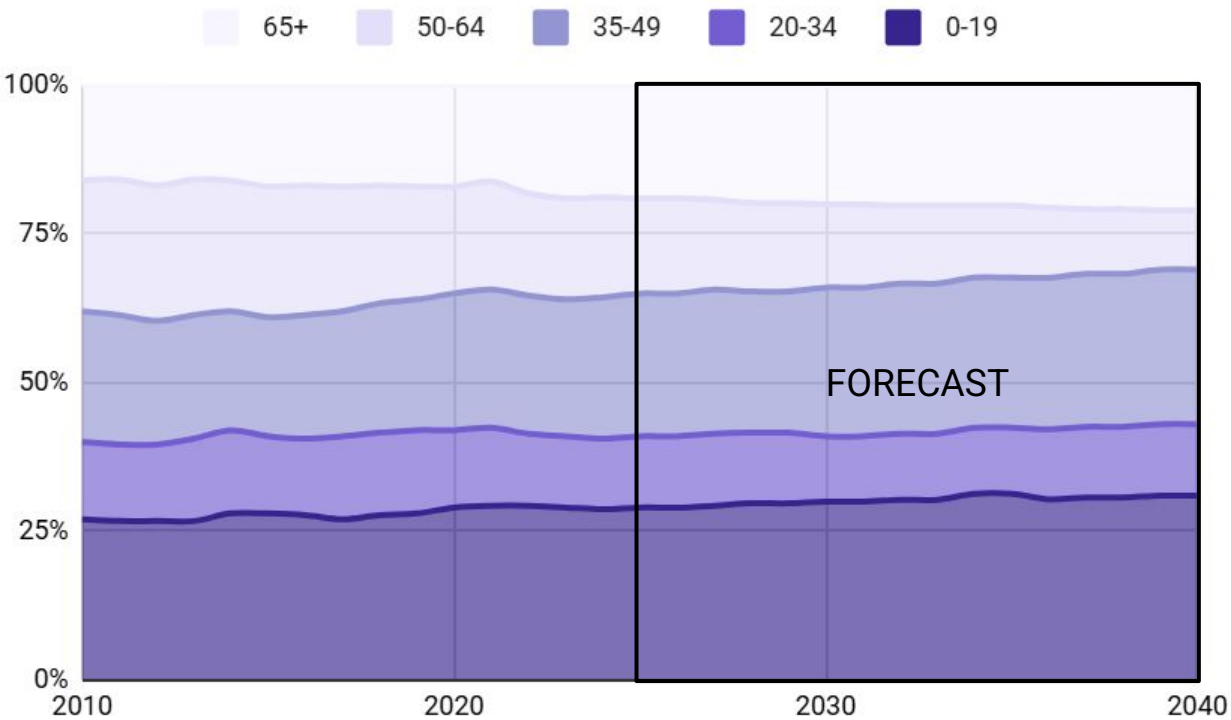
This chart illustrates trends in population by age cohort, both historic and projected. The projection is based on recent trends extended. Depending on economic, policy, and other conditions, the future age distribution may vary over time.

Downsizing seniors

Sources: Census ACS 2023 5-Year Upper Arlington characteristics.

Most older adults prefer to "age in place" in their existing homes. Only 5% of seniors relocate each year (versus 16% of the rest of the population), with only a portion of those movers specifically downsizing. Those seniors who do relocate are typically motivated by cheaper, better, or newer housing, family reasons, health reasons, or specific life events. They also strongly prefer staying within their community.

Relocating older adults are more likely to opt for a newer property, at a rate of about 20% moving into homes less than 10 years old as new homes are typically more suitable for aging.

In addition to the seniors currently in Upper Arlington looking to downsize, there may be additional demand from older adults looking to move back to Upper Arlington from places like Florida to be closer to grandkids.

Calculation of expected downsizing seniors

65+ households of 1-2 people in 3+ bedroom units	1,453
Potential annual downsizing rate	1.0%
10 year downsizers (and units needed to accommodate them)	**145**

Market study key findings

How much housing Upper Arlington could absorb given regional trends

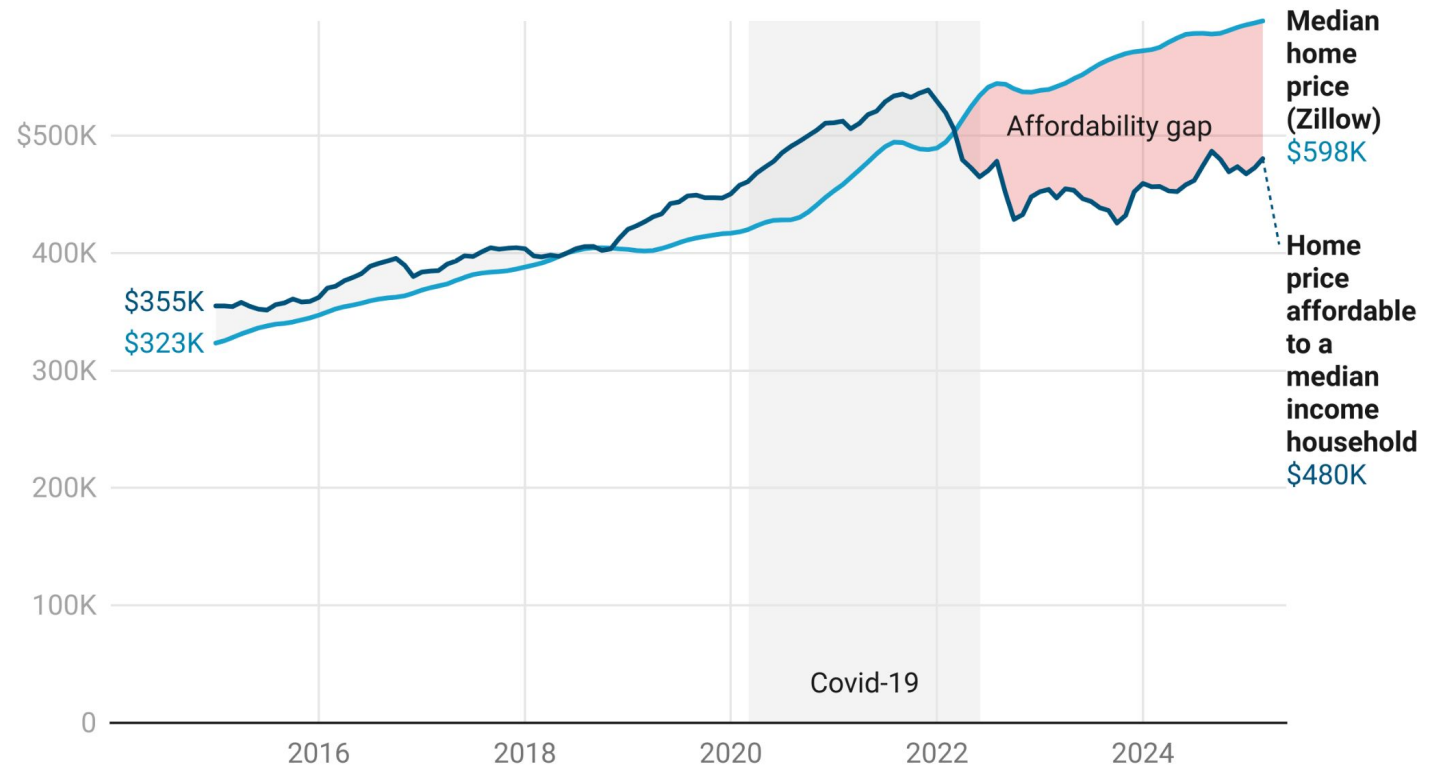# Housing supply constraints and infill limitations

Source: Zillow ZHVI 2024, Census ACS 2023 5-Year, data from March 2025. Upper Arlington median income.

As a landlocked and established community, infill and teardowns are required for redevelopment.

A median land cost of $1.3M per acre for recent teardowns, combined with increasing costs (materials, labor, interest rates), the price of a new single-family home cannot reasonably be less than what is currently on the market.

As a result, the median income household can no longer afford the median house price in Upper Arlington. This graph examines housing costs, prices, and other measures of affordability. Combined with the indicators, this data directly relates to cost burden from misaligned demand and supply.

How affordable is Upper Arlington in March 2025?

Affordability gap

Median home price (Zillow) $598K

Home price affordable to a median income household $480K

$355K
$323K

Covid-19

$597,535 Zillow March median home price.
$642,785 for single-family homes.
$293,478 for condos.
Mortgage rate 6.65%.
Property tax rate 2.68%.

Projected household growth

Sources: Census ACS 2023 5-Year. Upper Arlington trends.

[MTP's regional forecast](#) looks out to 2050. To meet Upper Arlington's allocation of overall regional growth, the Upper Arlington's housing market could absorb about 53 households per year, which means constructing 57 housing units a year as shown in subsequent findings.

Household growth forecast alternatives

Comparison of trends extended from 2010-2023 through 2050 and MTP's 2024-2050 forecast. For MTP's forecast, CommunityScale used the rate of change from blockgroups within Upper Arlington's boundary.

— Households, ACS   — Slope 2010-2023   — MTP 2024-2050 TAZ

14,389

16,489

15,798
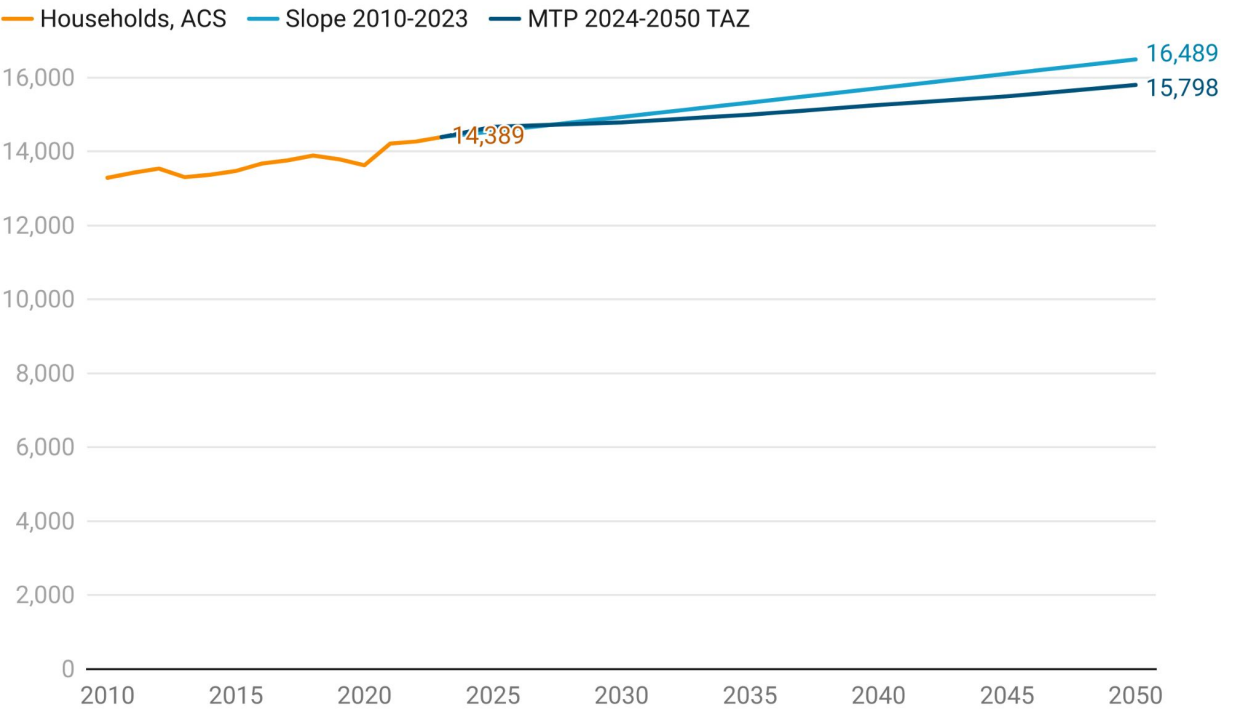
Upper Arlington's housing market within regional growth and demographic shifts

Source: 2023 ACS 5-Year. Columbus HUD Area median income. Upper Arlington characteristics.

The regional narrative is that Central Ohio is projected to keep growing, driven by job creation (e.g., Intel and Honda-LG sites) and ongoing in-migration.

MTP's regional forecast looks out 25 years to 2050. The Upper Arlington housing market could easily absorb 57 housing units per year given overall regional growth.

This analysis further breaks down the overall rate of household growth by household income. In this case, household incomes are grouped by their percent of HUD's Area Median Income, which is $103,300 (Columbus, OH HUD Metro FMR Area 2025).

If these trends continue, most of Upper Arlington's growth looking out will be in the >190% AMI group. There will also be modest growth in the 50-80% AMI group. The other AMI groups are relatively stable.

Household growth by household income

Upper Arlington using MTP overall household forecast and a model of trends extended by historic AMI

■ <50%   ■ 50-80%   ■ 80-120%   ■ 120-150%   ■ 150-190%   ■ >190%
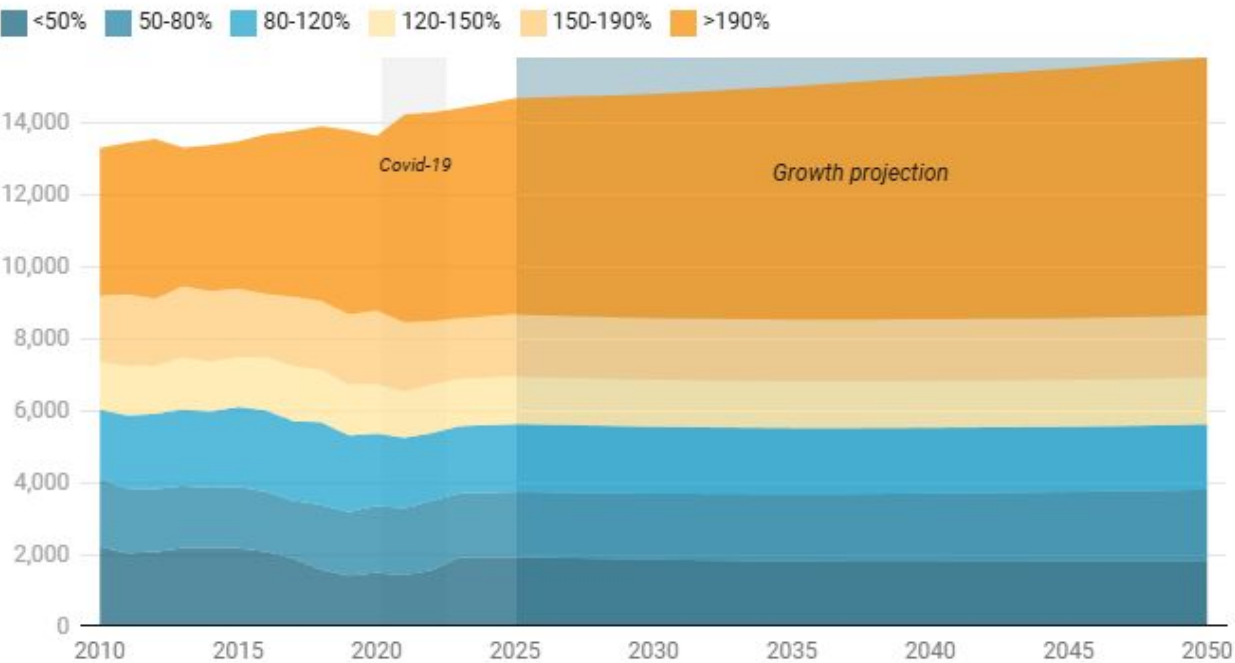
	Median income	Household income range	Monthly affordable housing costs	2010 Households	2023 Households
■	<50%	<$50,000	<$1,250	2,219	1,924
■	50-80%	$50,000-$80,000	$1,250-$2,000	1,891	1,772
■	80-120%	$80,000-$120,000	$2,000-$3,000	1,911	1,867
■	120-150%	$120,000-$150,000	$3,000-$3,750	1,325	1,302
■	150-190%	$150,000-$200,000	$3,750-$5,000	1,829	1,698
■	>190%	>$200,000	>$5,000	4,112	5,826

Household income segments and housing needs

Sources: Census ACS and PUMS 2023 5-Year. Columbus HUD Area median income.
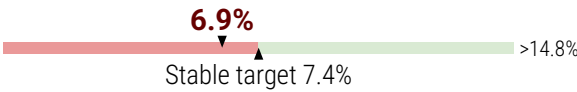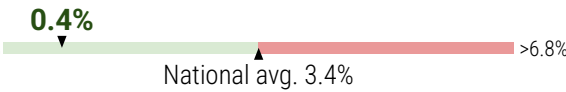
This summary table compares key housing need attributes per household income group.

<$50,000	$50,000 - $80,000	$80,000 - $120,000	$120,000 - $150,000	$150,000 - $200,000	>$200,000	
<50%	50-80%	80-120%	120-150%	150-190%	>190%	% of regional median
1,924	1,772	1,867	1,302	1,698	5,826	Total households (2025)
<$1,250	<$2,000	<$3,000	<$3,750	<$5,000	>$5,000	Monthly affordable housing costs
$136,000	<$217,000	<$333,000	<$417,000	<$560,000	>$560,000	Affordable purchase price
2.0	2.4	2.7	2.9	3.1	3.2	Average bedrooms for recent movers
60	56	54	53	54	52	Average age householder
0.4	0.9	1.4	1.7	1.8	1.8	Average income earners per household

Note: first column header row is "Household income".

Additional housing supply needed 2025-2050

Sources: Census ACS 2023 5-Year; CommunityScale, Harvard University Joint Center for Housing Studies.

The following calculation translates household growth to a target for housing supply and related housing production. This calculation takes into account several adjustments intended to relieve underlying market pressures such as pent up demand.

1,133	**Net growth in households**	Housing supply needed to keep up with projected household growth over the next 25 years (MTP forecast)	Projected growth 2025 2050
ADJUSTMENTS			
62	**Replacement**	Housing production for 0.1% annual replacement of overall stock throughout the planning period.	0.1% — 24,944 dwellings
166	**Ownership vacancy**	There aren't enough ownership units available to meet pent-up demand, creating unsustainably low vacancy that can drive up prices.	0.4% — 0% >3% — Stable target 1.5%
76	**Rental vacancy**	There aren't enough rental units available to meet pent-up demand, creating unsustainably low vacancy that can drive up prices.	6.9% — 0% >14.8% — Stable target 7.4%
0	**Overcrowding**	There aren't more overcrowded units than the national average, so no adjustment is needed.	0.4% — 0% >6.8% — National avg. 3.4%
0	**Substandard housing**	There aren't more substandard units than the national average, so no adjustment is needed.	0.2% — 0% >0.8% — National avg. 0.4%

1,437 **Total additional housing production** (9.8% total growth)

57 Annual housing production (0.4% annual growth)

Development Economics

Recent single-family housing permits

Sources: Upper Arlington building permits 2020-2025.

Map of single-family residential permits. Larger homes are typically more expensive. Single-family residences by type:

🔴 **Large home, large lot:** >2,000 sf, >0.33 acre lot

🟢 **Large home, medium lot:** >2,000 sf, 0.25-0.33 acre lot

🟣 **Large home, small lot:** >2,000 sf, <0.25 acre lot

🟠 **Medium home, medium lot:** 1,400-2,000 sf, 0.25-0.33 acre lot

🔵 **Medium home, small lot:** 1,400-2,000 sf, <0.25 acre lot

🟡 **Small home, large lot:** <1,400 sf, >0.25 acre lot

🟣 **Small home, small lot:** <1,400 sf, <0.25 acre lot

These multi-family types appear in subsequent analysis pages:

⚫ **Small multi-family:** 2-49 units

⚪ **Large multi-family:** 50+ units

Municipal revenue per acre

Lane Lofts
230 units
$37,382/acre

4,900sf home
1 unit
$13,365/acre

● Large home, large lot
● Large home, medium lot
● Large home, small lot
● Medium home, medium lot
● Medium home, small lot
● Small home, large lot
● Small home, small lot
● Small multi-family
● Large multi-family

Municipal revenue per unit

Legend:
- Large home, large lot
- Large home, medium lot
- Large home, small lot
- Medium home, medium lot
- Medium home, small lot
- Small home, large lot
- Small home, small lot
- Small multi-family
- Large multi-family

11,500sf home
1 unit
$7,096/unit

2,000sf home
1 unit
$918/unit

Property type and enrolled students

Sources: City of Upper Arlington 2025. Upper Arlington City Schools student counts per address (2025).

Enrolled students per 100 units

Upper Arlington City Schools student counts per address (2025) and associated property types within the school system. The total units for Large multifamily excludes the City's 594 age-restricted senior units. The Lane (1600 W Lane) has 108 dwellings and 10 enrolled students. Westmont at The Lane (1670-1690 W Lane) has 141 dwellings and 16 enrolled students. That is an average of 10 enrolled students per 100 dwellings. The Kingston (3181 Northwest Blvd) has 363 dwellings and 12 enrolled students, but it is still leasing up.

Property type	Enrolled students per 100 units
Small multi-family	1.4
Large multi-family	6.2
Small home, small lot	30.6
Large home, small lot	40.2
Medium home, medium lot	45.6
Small home, large lot	50.3
Large home, large lot	55.8
Large home, medium lot	67.9
Medium home, small lot	69.3

An appraised value of $619K is the tipping point for the balance of City expenses and revenue

Sources: City of Upper Arlington 2025, based on projected FY 2026 budget. Number of dwellings units is ~15,122 based on 2023 ACS.
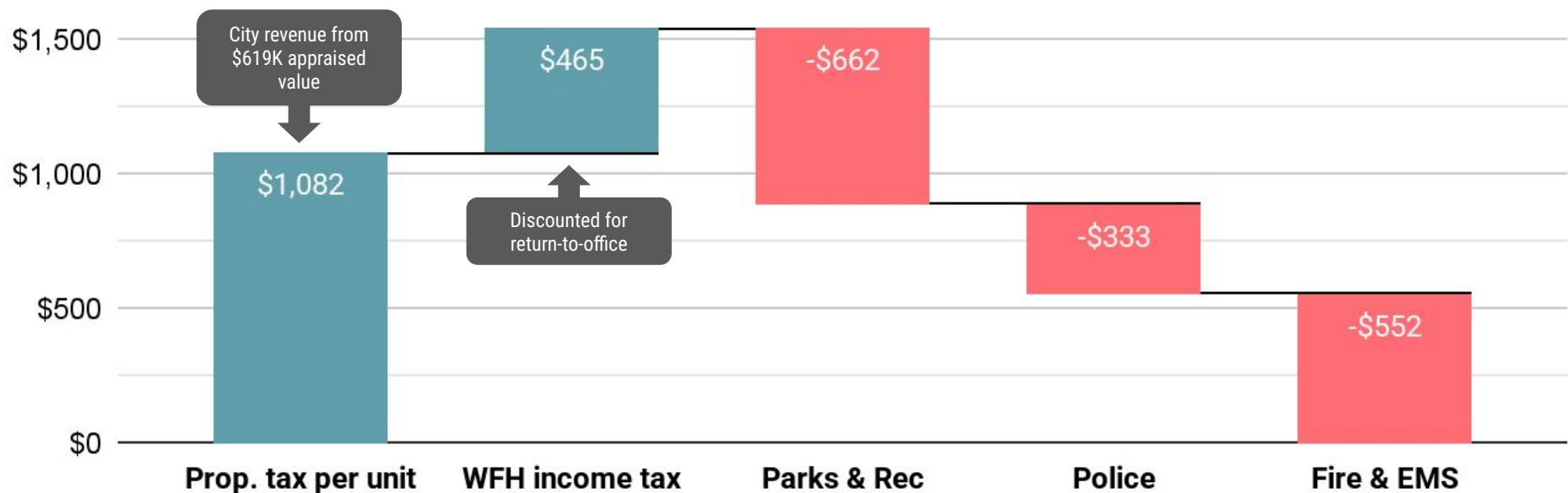
Notes on revenue and operational expenses

Housing is revenue positive for the City when the marginal revenues are balanced with the additional operational expenses for cost-to-serve.

- **Property tax:** A home with a total assessed value of $619K generates $1,082 in property tax revenue for the City.
- **WFH income tax:** In 2023, 24% of UA employees worked-from-home. For this analysis we assume that number drops by a third due to return-to-office. Still, the overall impact of WFH is an important consideration for expected revenue.
- **Parks and recreation:** The division's overall operational expenses divided by UA's 15,130 residential dwellings.
- **Police, EMS, Fire:** Operational cost-to-serve for residential, based on number of calls and expected staffing needs.
- **Revenues and fees not included:** Fees already balanced by service, i.e. swimming pool, waste, water, sewer, are not included.
- **School budget:** The schools receive their funding through a separate line item in the property tax.

How much additional income tax does work-from-home (WFH) create per residence?

Sources: City of Upper Arlington 2025. 2023 ACS. Longitudinal Employer-Household Dynamics (LEHD). The following calculation estimates the additional income tax revenue from UA residents who are working-from-home (WFH) on jobs that are outside of UA by discounting the absolute share of WFH residents by the share of jobs in UA held by residents of UA.
.

$35,544,200	**Income tax revenue** (2025 UA municipal budget estimate for 2026)
4,408	**UA residents WFH** (24.7% WFH for 17,846 working UA residents, ACS 2023)
4,078	**UA residents adding income tax revenue by WFH for a job outside of UA** (ACS, LEHD 2023)
10,066	**Jobs with addresses in UA contributing to income tax revenue** (12,929 total jobs in UA minus WFH employees outside of UA, LEHD 2023)
14,144	**Jobs in UA contributing to income tax revenue plus UA residents WFH for non-UA jobs**
28.8%	**Share of income tax created by WFH UA residents for non-UA jobs** (4,078 UA residents WFH for non-UA jobs / 14,144 total jobs contributing to income tax revenue and WFH jobs in 2023)
$10,248,203	**Income tax from WFH** (Assuming equal distribution of wages and 2023 WFH rate)
$678	**Income tax per dwelling unit based on 2023 WFH rates before return-to-office** ($10.2M / 15,122 residences)
$465	**Income tax per dwelling unit after 30% return-to-office** (Return-to-office has a net detrimental effect for UA because UA has more employees than jobs)

Revenue balance scenarios with different development types and balancing points

Sources: City of Upper Arlington 2025, based on projected FY 2026 budget. Number of dwellings units is ~15,122 based on 2023 ACS.

	New single family	**New two family detached**	**New multifamily**	**Break even point single family**	**Break even point four family**
	3072 Asbury Dr	*3445 London Ct*	*The Kingston*	*Hypothetical*	*Hypothetical*
	SF, 2018	*2F, 2015*	*Multi, 2023*	*SF*	*Quadplex*
Total assessed value (2024)	$1,403,000	$1,819,200	$47,196,300	$619,046	$2,476,184
Total assessed value per unit	$1,403,000	$909,600	$145,219	$619,046	$619,046
Total tax rate	2.03%	2.01%	2.86%	2.02%	2.02%
Total revenue	$28,429	$36,556	$1,348,998	$12,492	$49,967
City share of total revenue	8.66%	8.66%	8.66%	8.66%	8.66%
Total revenue to City	$2,462	$3,166	$116,841	$1,082	$4,328
Units	1	2	325	1	4
Total City property tax revenue per unit	$2,462	$1,583	$360	$1,082	$1,082
WFH income tax	$465	$465	$465	$465	$465
Parks & Rec	-$662	-$662	-$662	-$662	-$662
Police	-$333	-$333	-$430	-$333	-$333
Fire & EMS	-$552	-$552	-$780	-$552	-$552
Balance	**$1,380**	**$501**	**-$1,047**	**$0**	**$0**

How economies of scale tip in the City's favor

As discussed earlier, new housing in Upper Arlington is typically above the break even point for revenue versus the cost-to-serve the new home. In addition to new housing already benefiting the City, each new housing unit will improve the efficiency of the City's infrastructure while also increasing overall productivity and economic growth.

Research by Bettencourt et al. (2007) demonstrates that the infrastructure requirements are in the City's favor as it grows, i.e. new need for infrastructure scales sublinearly with population. In practical terms, this means:

- **Economies of Scale:** Infrastructure such as roads, water systems, and energy networks do not need to double when the population doubles. Instead, they increase by a smaller factor (around the 0.8 power of population growth). For example, doubling the population only requires about a 1.7-fold increase in infrastructure.

- **Per Capita Cost Reduction:** As more households are added, the per capita demand on infrastructure decreases. This translates into more efficient service delivery and potentially lower relative costs for expanding services.

- **Fiscal Implications:** Adding new households is less likely to strain municipal finances because the incremental infrastructure cost is lower than a one-to-one increase. The built-in efficiency means that growth can, in fact, improve fiscal health by spreading costs over a larger population.

- **Increased productivity:** While infrastructure scales sublinearly, there is a superlinear scaling of employment, wages, and even inventions. Knowledge spillovers and economic activity increase wealth faster as the network expands.

In summary, as cities add housing, the cost of providing essential services per household decreases because the new homes leverage existing infrastructure and distribute expenses such as police, fire protection, and parks across more households. For Upper Arlington, a 9.8% increase in housing units from 2025-2050 as forecasted by MORPC's Metropolitan Transportation Plan would only require about 8.2% additional resources.

L.M.A. Bettencourt, et al., "Growth, Innovation, Scaling, and the Pace of Life in Cities," Proceedings of the National Academy of Science 104 (2007): 7301–6.

A development proforma shows what it takes to make a project pencil in Upper Arlington

Proformas

A proforma is a financial model that predicts the expected value of a real estate project. The team then compared that value to the household income required to afford the new home based on the attainability assumptions in this table. Understanding the cost drivers of housing can help set policies to make housing attainable to targeted income levels.

In this section, the analysis looks at what the the cost drivers for residential development in Upper Arlington using these typical development scenarios:

- 🟣 Single family, small lot, single story:
  1,400 sf on a 0.2 acre lot
- 🔴 Single family, large lot, large house:
  over 4,500 sf on a 0.5 acre lot
- ⚪ New owner occupied small-scale 2-49 unit multifamily
  (i.e. condos and owner-occupied townhome)
- ⚪ New multi-family greater than 50 units

For this analysis, the team interviewed local housing developers, analyzed market conditions with data sources including CoStar and Zillow as well as recent sales.

Housing attainability assumptions

Affordability	Value	Source
2025 AMI	$103,300	HUD
Mortgage rate	6.72%	FRED (Dec 2024)
Mortgage term	30	
Cost burden threshold	30%	
PMI (rate + baseline)	0.30%	CommunityScale
Insurance (rate + baseline)	0.02%	CommunityScale
Utilities (rate + baseline)	0.30%	CommunityScale
Property tax overall	2.60%	Upper Arlington (Jan 2025)

Small lots (<¼ acre) being redeveloped are worth $1.9M per acre on average

Sources: Zillow, Redfin, BLS CPI, Upper Arlington building permit records, accessed 2025-01-28

BEFORE

AFTER

Address	Before price (2025 USD)	Total value after Estimated current market value	Lot area (sqft)
2440 Wickliffe Rd	$308,500	$741,100	9,877
2410 Farleigh Rd	$424,900	$832,800	10,373
1511 Doone Rd	$491,800	$879,300	8,378
2428 Swansea Rd	**$319,600**	**$1,258,300**	**7,697**
1553 Grenoble Rd	$461,300	$1,268,838	8,317
2438 Farleigh Rd	$433,000	$1,803,500	10,585
AVERAGE	**$406,500**	**$1,151,178.74**	

2428 Swansea Rd (0.17 acres) before redevelopment sold for $300K ($1.8M/acre after inflation). After redevelopment it is worth $1.3M total.

What drives the cost of small lots with smaller houses?
For a prototypical lot of 8,700 square feet (0.2 acres) with a 1,400 square foot single-family residence, the sale price for Upper Arlington is typically three times the price of the lot before it is redeveloped. The most expensive inputs are construction costs ("hard costs"), design, permitting, and carrying costs ("soft costs"), and finally the land cost. With all these costs plus 15% profit for the developer, the sale price should be at least **$1,144,000**. This home would be affordable to a household earning **$374,500 a year**, which is 363% of the median household income.

Large lots (>⅓ acre) being redeveloped are worth $1.3M per acre on average

Sources: Zillow, Redfin, BLS CPI, Upper Arlington building permit records, accessed 2025-01-28

BEFORE

AFTER

4010 Fairfax Dr (0.77 acres) before redevelopment sold for $355K ($573K/acre after inflation). After redevelopment its worth $1.7M total. Land cost has historically been variable in this category ($480K to $2.1M per acre).

What drives the cost of large lots with larger houses?
For a prototypical lot of 0.5 acres with a 4,500 square foot single-family residence, the sale price for Upper Arlington is typically more than three times the price of the lot before it is redeveloped. The most expensive inputs are construction costs ("hard costs"), design, permitting, and carrying costs ("soft costs"), and finally the land cost. Developers are opting for larger homes to cover their costs, with sales price is likely **$2,144,000** depending on the land cost. This home would be affordable to a household earning **$607,000 a year**, which is 588% of the median household income.

Address	Before price (2025 USD)	Total value after Estimated current market value	Lot area (sqft)
2278 Wickliffe Rd	$426,900	$1,106,000	23,500
2109 Oakmount Rd	$305,000	$1,258,700	17,624
2592 Eastcleft Dr	$364,300	$1,396,300	19,035
2510 Eastcleft Dr	$369,700	$1,406,300	19,038
3010 Derby Rd	$515,300	$1,480,100	25,112
4225 Kenny Rd	$477,100	$1,481,400	43,345
1118 Highland Dr	$531,400	$1,638,588	23,814
4010 Fairfax Dr	**$443,000**	**$1,686,600**	**33,626**
3068 Avalon Rd	$528,900	$1,789,118	21,289
2814 Exmoor Rd	$1,027,100	$1,823,645	20,758
4611 Coach Rd	$620,400	$2,075,800	40,854
2725 Fairfax Dr	$376,500	$2,083,600	28,569
2814 Exmoor Rd	$1,028,900	$2,100,000	20,758
AVERAGE	**$539,600**	**$1,446,965**	

New owner occupied small-scale 2-49 unit multifamily

How is the proforma for new ownership townhomes and condos different?

This proforma re-imagines a 0.5 acre parcel as four owner-occupied homes rather than a single-family home. Each unit is 1,500 square feet per unit. As before, the sale price is driven by inputs are construction costs ("hard costs"), design, permitting, and carrying costs ("soft costs"), and finally the land cost. With all these costs plus 15% profit for the developer, the sale price is likely **$783,000 per unit** depending on the land cost. This home would be affordable to a household earning **$259,000 a year**, which is 251% of the median household income. These homes are significantly more attainable than single-family homes and represent a higher level of property tax revenue per acre due to the increased improvement of the land.

Note that smaller units, i.e. 650 square feet, might be able to achieve prices as low as $467,000 for new construction, attainable at 150% AMI.

Thrive Quarry Trails
Nearby example of smaller new homes

New multi-family greater than 50 units

What drives the cost of new rental multi-family with more than 50 units?
A proforma for a large scale rental project is calculated differently than smaller owner-occupied projects. The rental price drives the project. Today, the market rent is in the range of **$2,250 per unit** for a 900 square foot unit. This home would be affordable to a household earning **$98,000 a year**, which is 95% of the median household income.

For the purpose of this analysis, we assume a 200 unit building with a construction cost of $175,000 per unit. Given today's cap rate of 6%, which determines the effective sales price of the building, the most residual value this 200 unit project could create to pay for the land is $75,000. At 15 units per acre with surface parking, the 200 units would need 13.3 acres, which would cost more than $26M at today's land price of $2M/acre for parcels with higher allowed use density. With $75K being less than $26M, the project does not pencil without significant public investment.

Alternatively, the project could be considered at 100 units per acre (similar to The Kingston) with structured parking at a cost of $75K per parking space. In this scenario, the total development cost is less, but there is still a $12.7M overall financing gap, or **$63K per unit**, which includes the cost of parking. This rate is consistent with incentives being offered by the City of Columbus and other jurisdictions to encourage denser, mixed-use development.

The Kingston
3.08 acres, 325 units
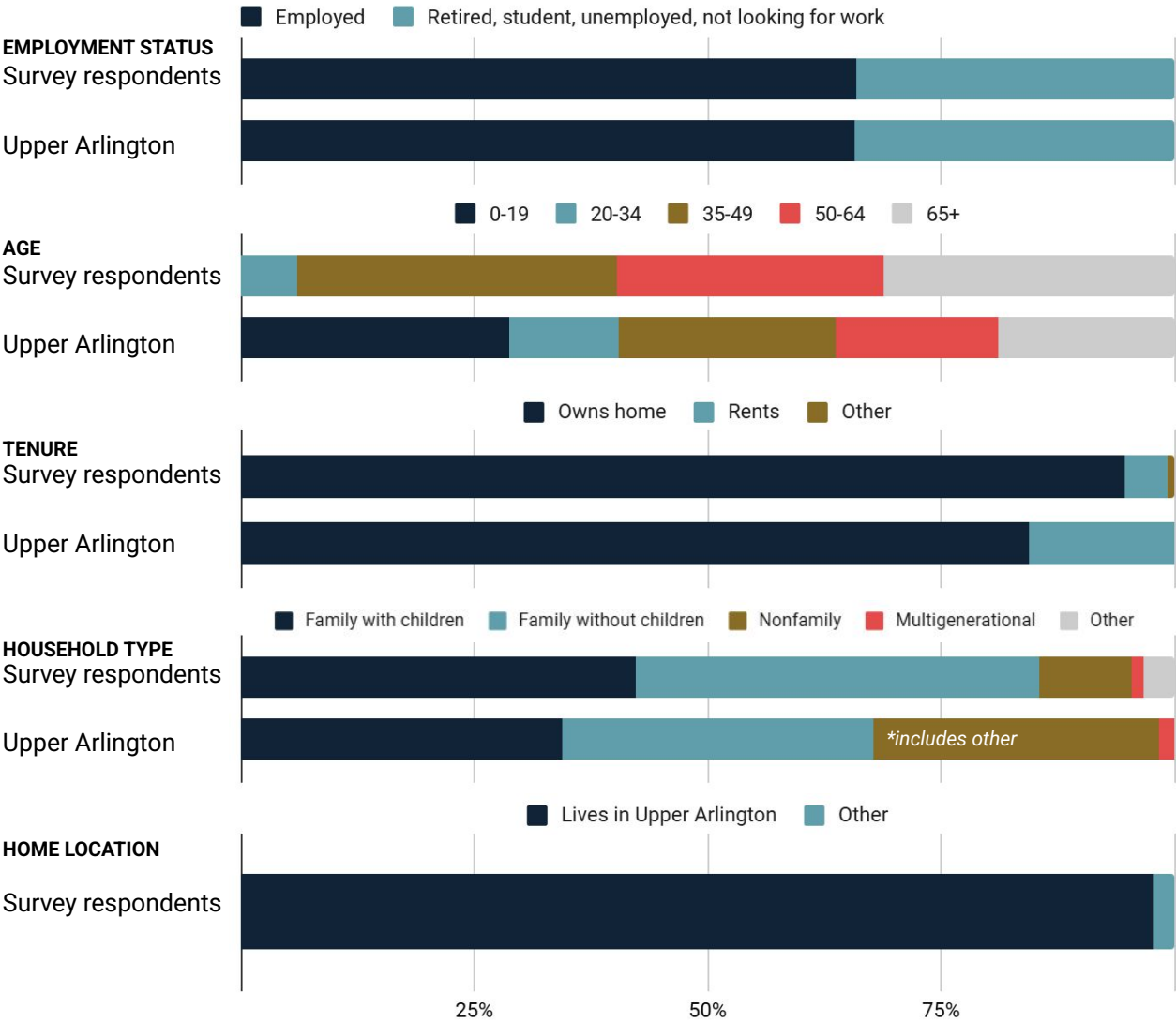$2.19 Asking Rent per square foot

Engagement: Survey Results

Survey respondents

While the survey received 716 responses, the respondents are in some ways not a representative sample of who lives in Upper Arlington. For example, homeowners and older individuals were overrepresented in the survey, while renters and young people were underrepresented - or, in the case of residents younger than age 20, not represented at all.
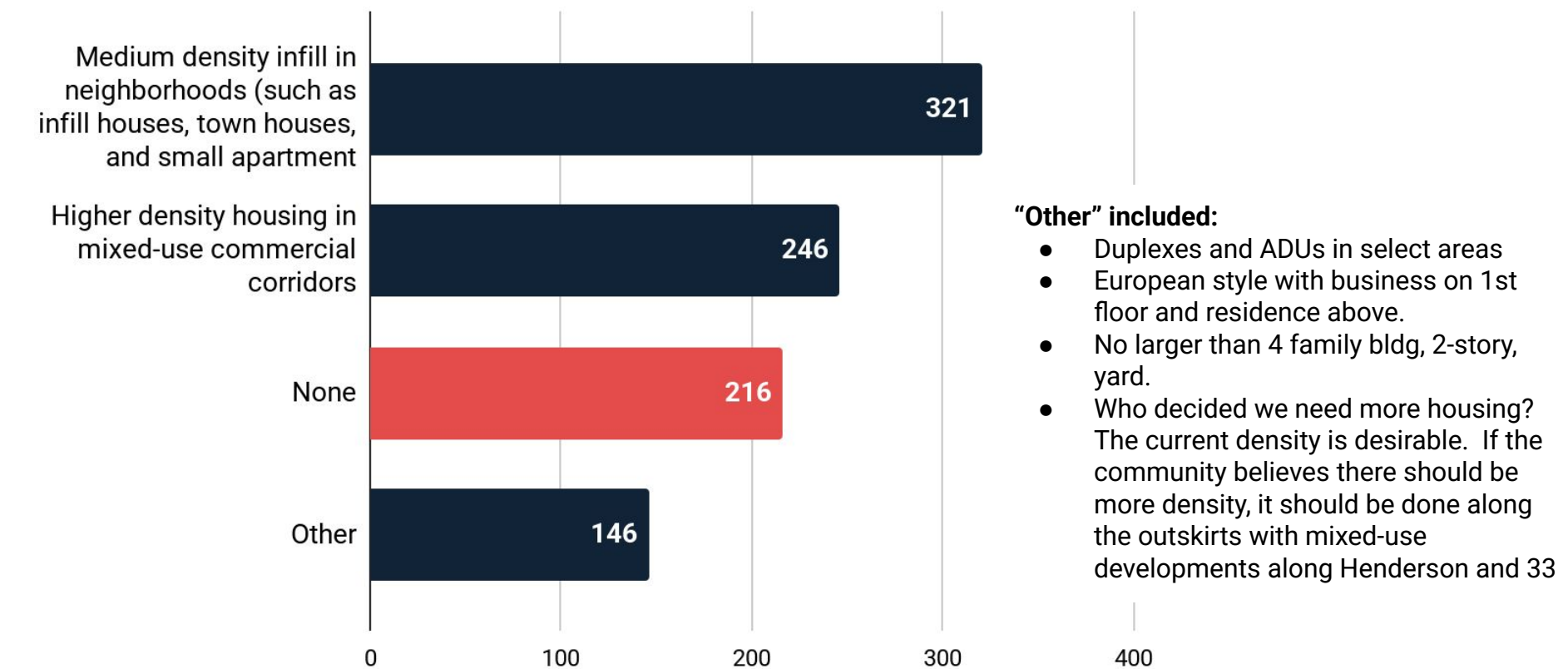
With a sample size of 716 from a population of 35,743, we are 95% confident that the margin of error is ±3.6%. A margin of error under ±5% is generally considered good for many types of surveys. However, as noted, there is response bias as the polling was not random.

EMPLOYMENT STATUS

■ Employed   ■ Retired, student, unemployed, not looking for work

Survey respondents

Upper Arlington

AGE

■ 0-19   ■ 20-34   ■ 35-49   ■ 50-64   ■ 65+

Survey respondents

Upper Arlington

TENURE

■ Owns home   ■ Rents   ■ Other

Survey respondents

Upper Arlington

HOUSEHOLD TYPE

■ Family with children   ■ Family without children   ■ Nonfamily   ■ Multigenerational   ■ Other

Survey respondents

Upper Arlington   *includes other*

HOME LOCATION

■ Lives in Upper Arlington   ■ Other

Survey respondents

25%   50%   75%

SURVEY RESULTS

There is demand for more housing in Upper Arlington. In your opinion, where could that be accommodated? Select all that apply.

n = 695

"Other" included:
- Duplexes and ADUs in select areas
- European style with business on 1st floor and residence above.
- No larger than 4 family bldg, 2-story, yard.
- Who decided we need more housing? The current density is desirable. If the community believes there should be more density, it should be done along the outskirts with mixed-use developments along Henderson and 33

What housing types should be prioritized to complement the City's supply of detached single family houses? Select all that apply.

n = 673
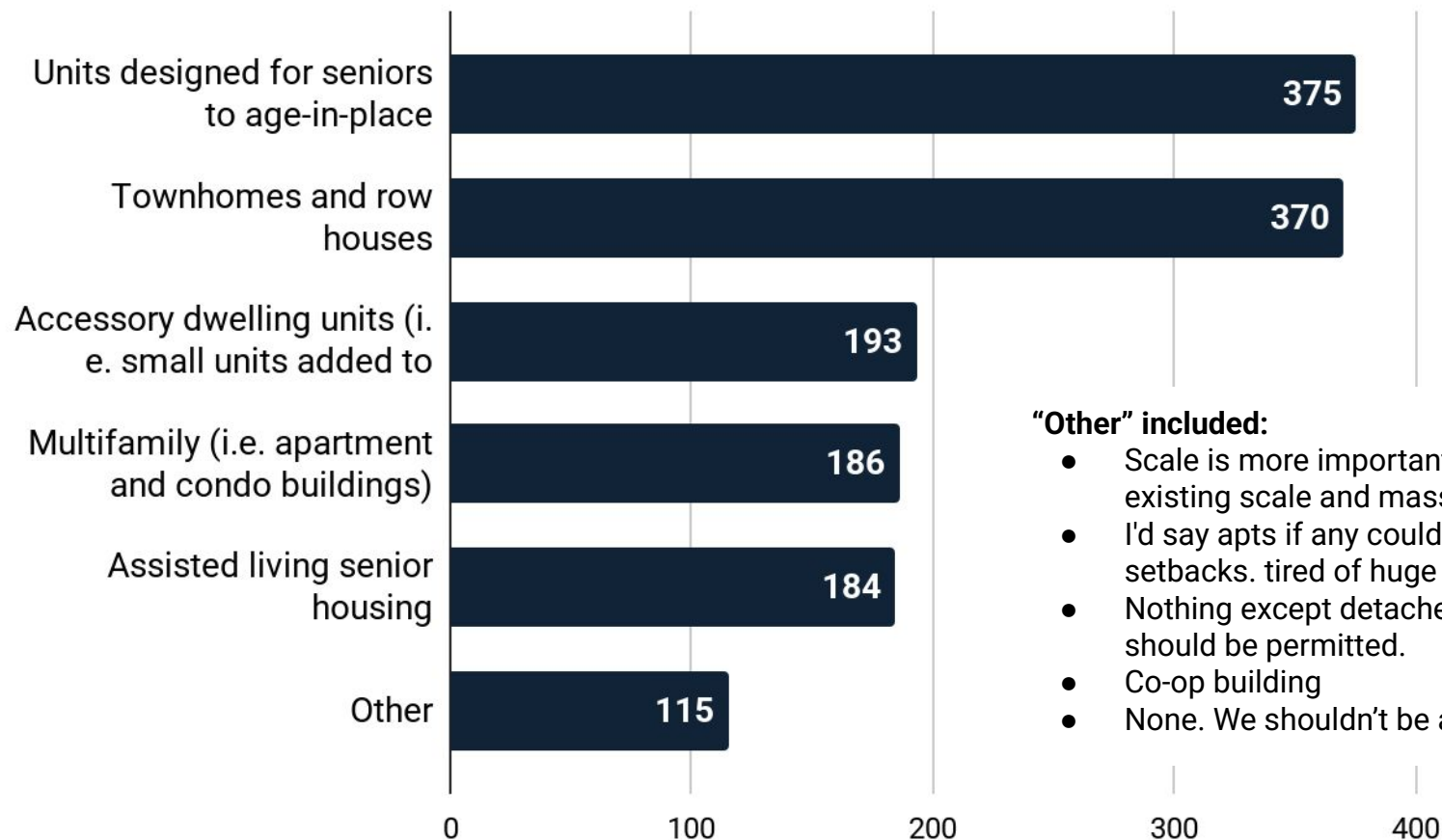
"Other" included:
- Scale is more important than density. Match existing scale and massing especially for infill.
- I'd say apts if any could be designed with decent setbacks. tired of huge cubes
- Nothing except detached single family houses should be permitted.
- Co-op building
- None. We shouldn't be adding transient housing.

Which policy ideas would you support in your community to help increase housing options where you live? Select all that apply.
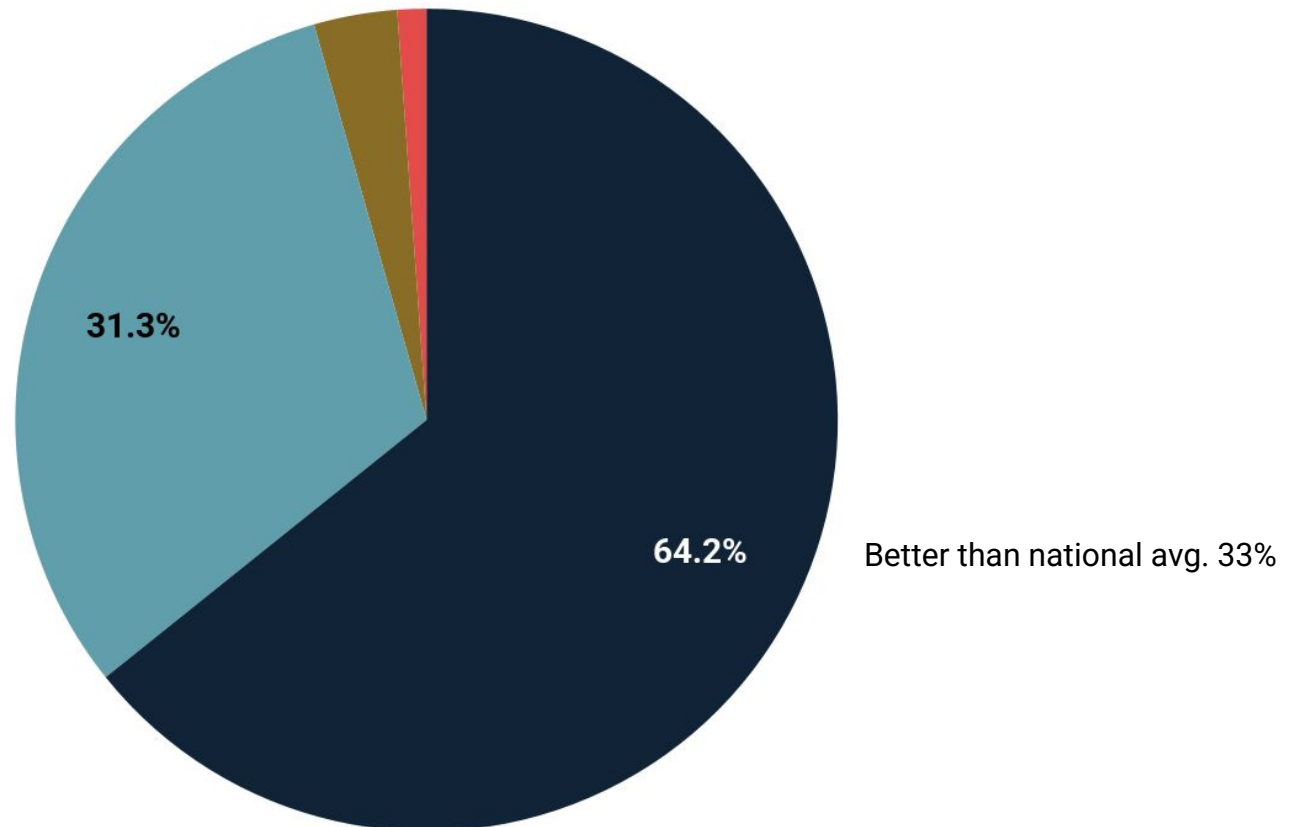
n = 674
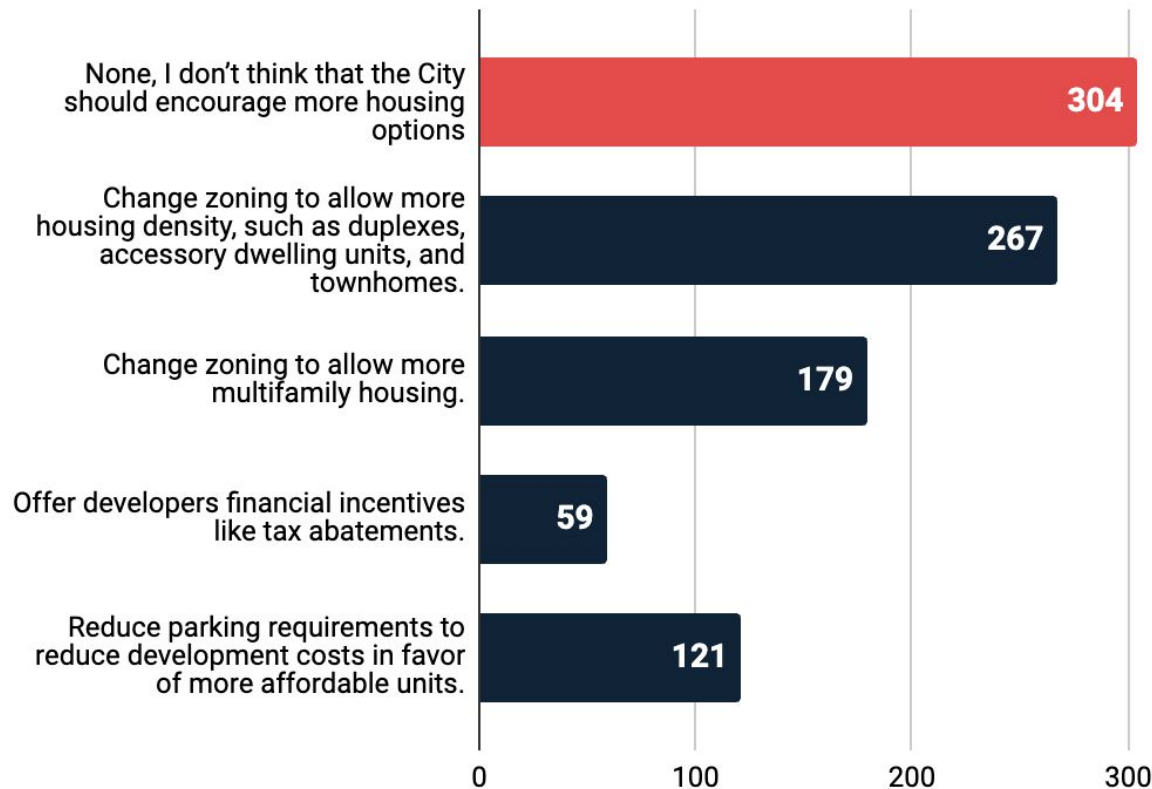
"Other" included:

- I'm not educated enough on this issue to opine.
- More family units in areas close to stores. Don't stick multiple units in the middle of an established neighborhood.
- The city needs to do more to protect existing housing stock and limit opportunity for developers to demo and infill with structures out of step with current neighborhood design characteristics and scale.
- Create incentives and/or mandates for accessibility (i.e. wheelchair accessible apartments or ramped entries for ground level housing).
- Consider neighborhood resources, such as availability of sidewalks if reducing parking requirements
- Allow for easier additions to current houses
- If zoning changes are made, they should only be made in areas that are already clearly commercial or mixed-use, such as Lane Avenue or the Henderson Road corridor.

How satisfied would you say you are with the quality of life in your community?

95% of respondents are satisfied with quality of life in Upper Arlington

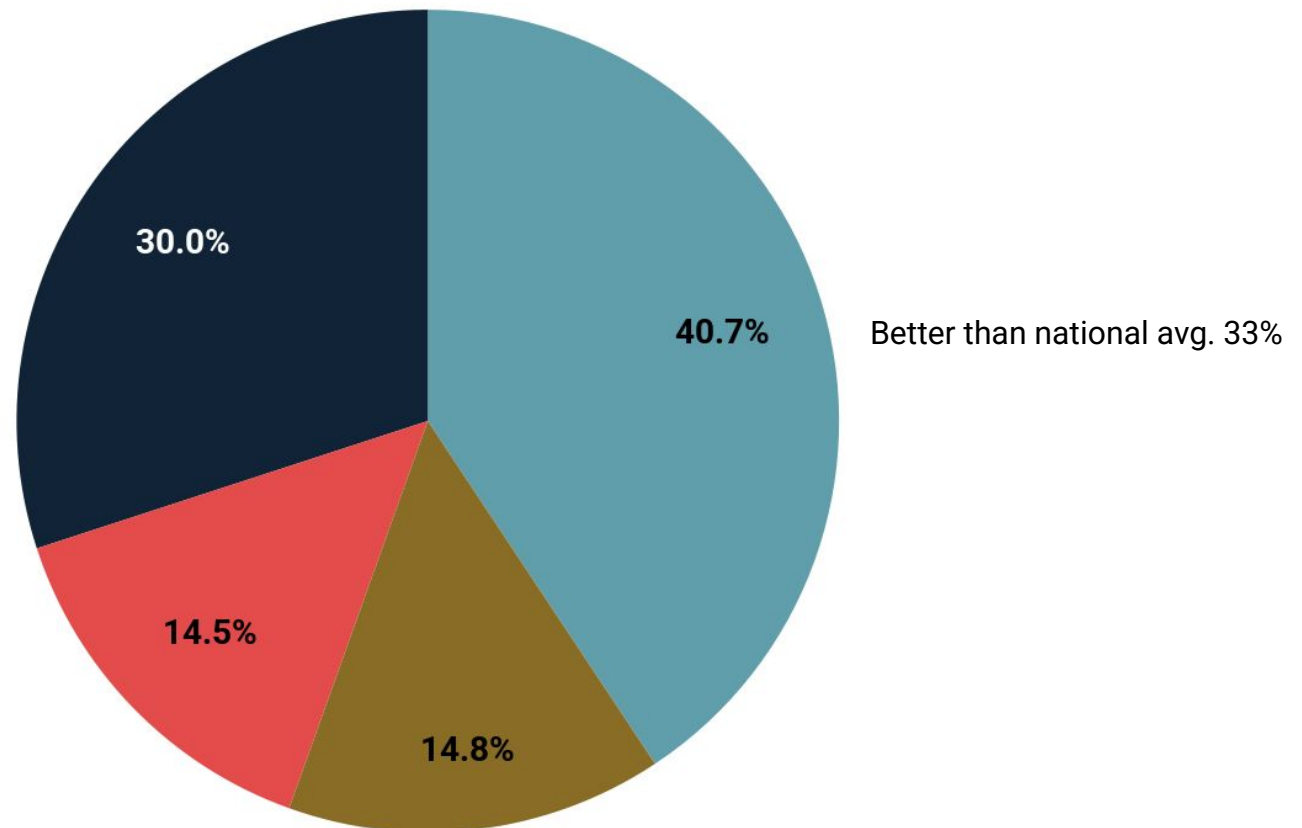- ● Very Satisfied
- ● Somewhat Satisfied
- ● Somewhat Dissatisfied
- ● Very Dissatisfied

31.3%

64.2%   Better than national avg. 33%

Benchmark to NAR national community preferences survey 2023

Now thinking about your neighborhood and home, please indicate whether you agree or disagree with the following statement: There are a lot of places to walk nearby, such as shops, cafes, and restaurants.

- **Somewhat Agree**
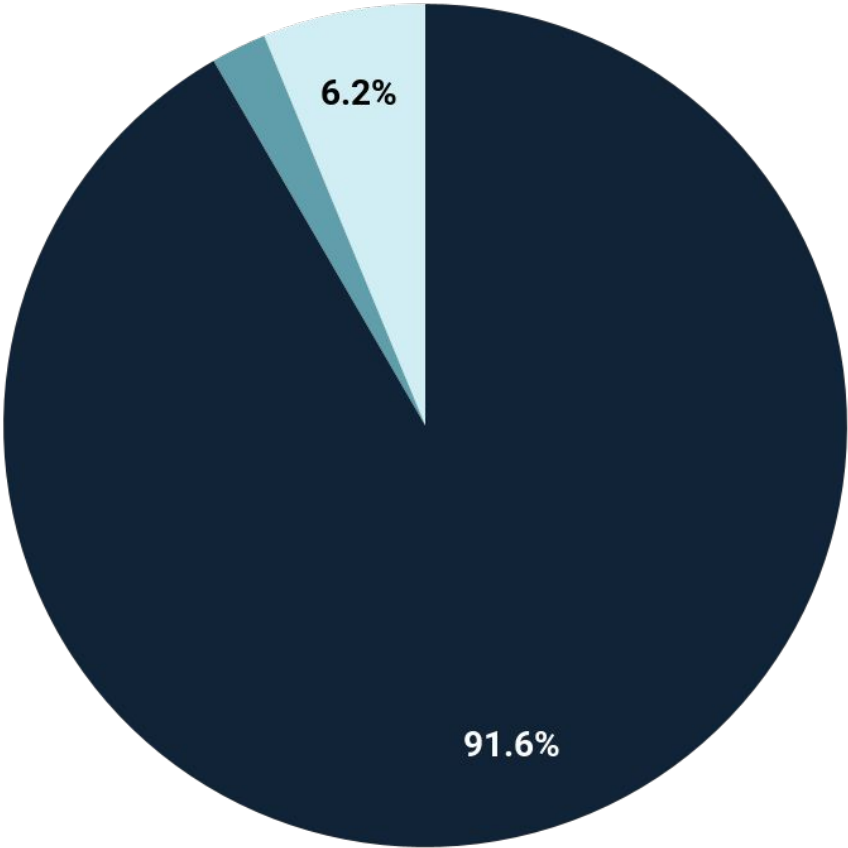- **Somewhat Disagree**
- **Strongly Disagree**
- **Strongly Agree**

30.0%

40.7%   Better than national avg. 33%

14.5%

14.8%

Benchmark to NAR national community preferences survey 2023
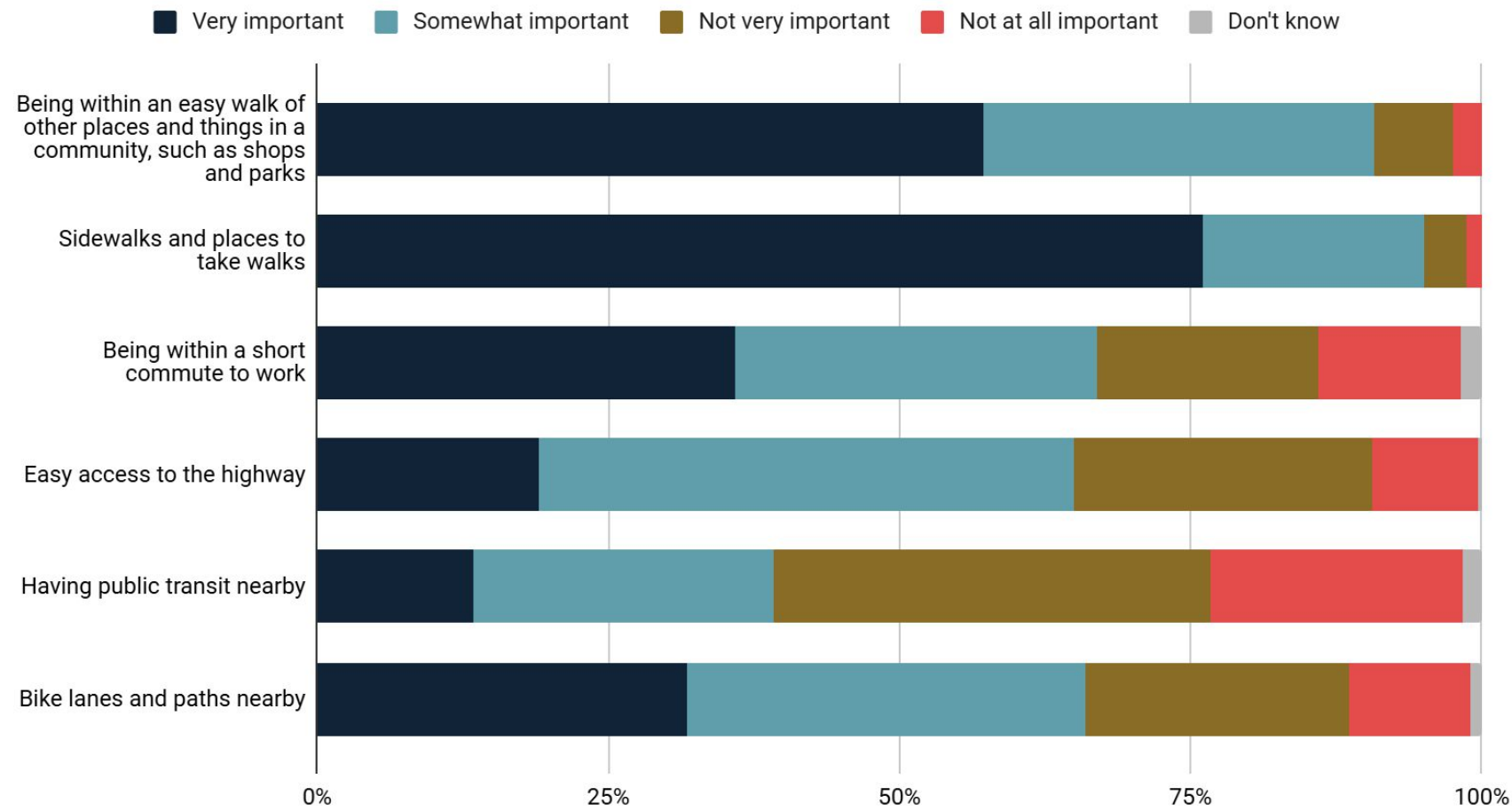
Do you live in:

- ● A single-family, detached house
- ● A single-family, attached house such as a townhouse or rowhouse
- ● A building with two or more apartments or condos

6.2%

91.6%

If you were deciding today where to live, please indicate how important each of the following would be to you:

Legend: ■ Very important   ■ Somewhat important   ■ Not very important   ■ Not at all important   ■ Don't know

Categories (top to bottom):
- Being within an easy walk of other places and things in a community, such as shops and parks
- Sidewalks and places to take walks
- Being within a short commute to work
- Easy access to the highway
- Having public transit nearby
- Bike lanes and paths nearby

X-axis: 0%, 25%, 50%, 75%, 100%

If you were moving to a new home, would you be willing to spend more to live in a community where you could easily walk to parks, shops, and restaurants?
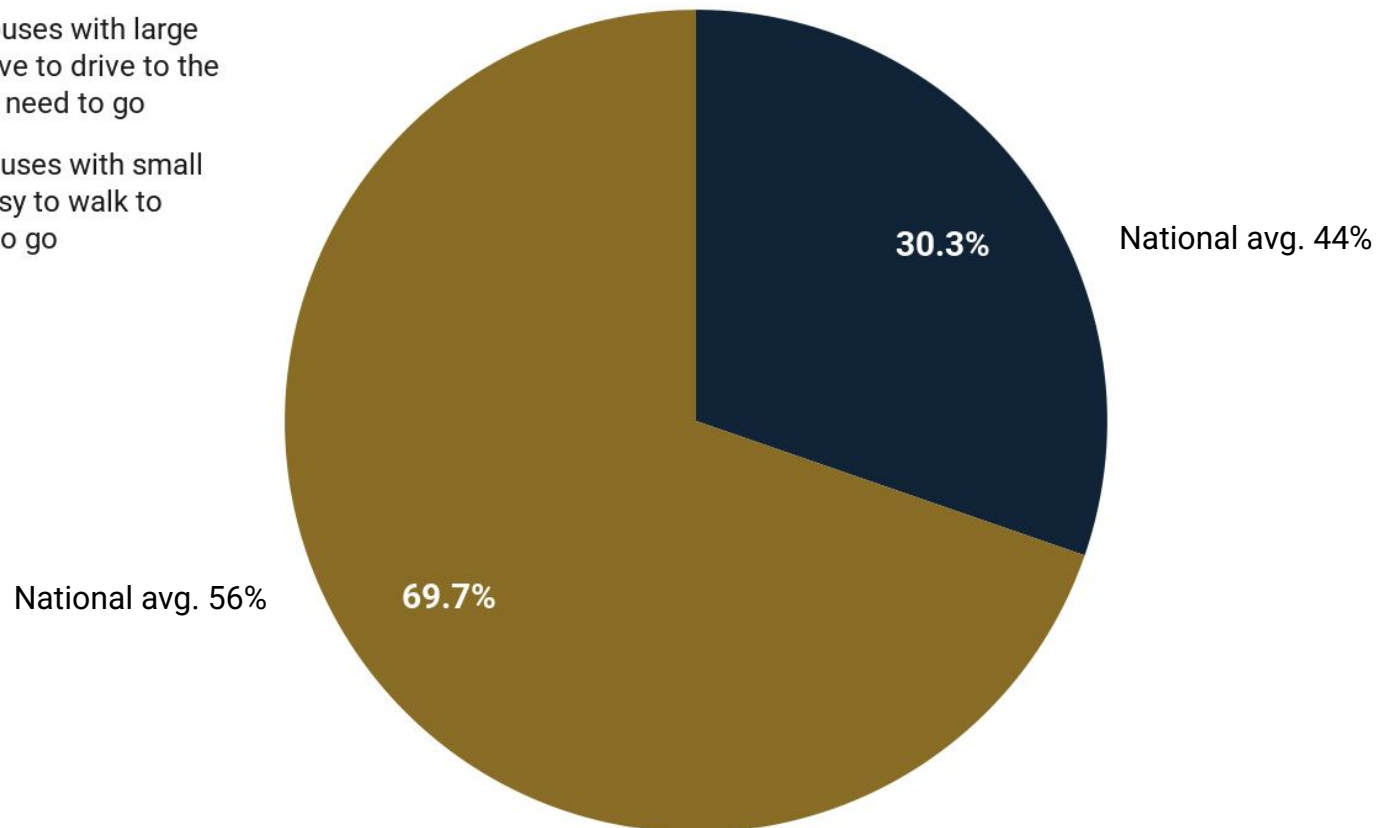
Legend:
- 🔴 Being within an easy walk of places isn't important to me
- ⬛ Yes, a lot more
- 🟦 Yes, a little more
- 🟫 No, no more
- ⬤ Don't know

Pie chart values:
- 5.3%
- 21.7%
- 21.2%
- 50.3%
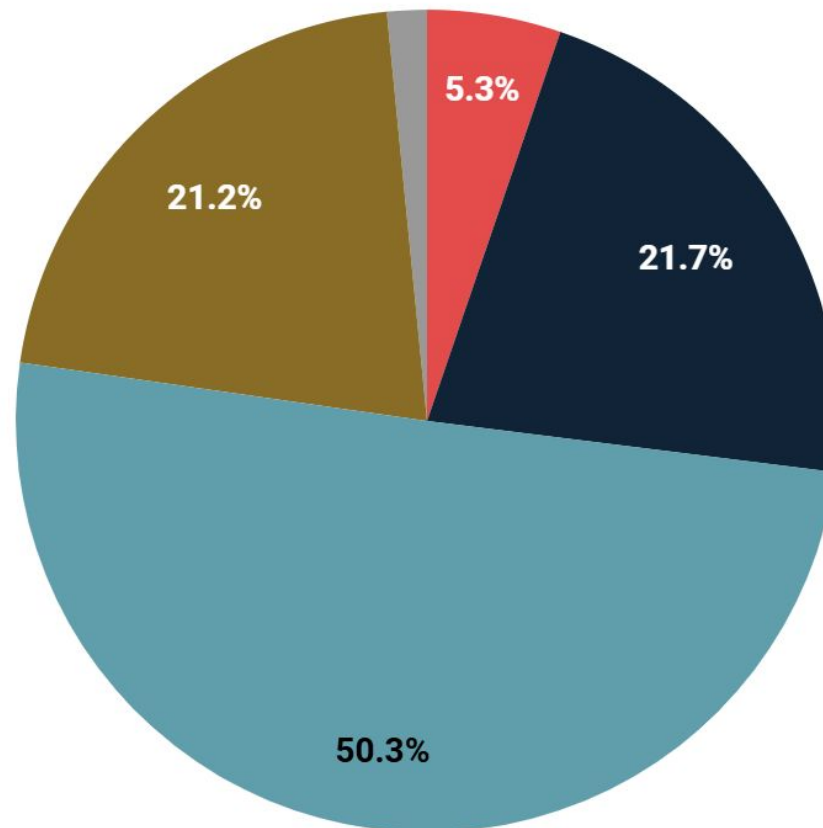
Continue to imagine that you are moving to another home. Please select the community that you prefer.

● Community A: Houses with large yards, and you have to drive to the places where you need to go

● Community B: Houses with small yards, and it is easy to walk to places you need to go

30.3%   National avg. 44%

National avg. 56%   69.7%

Benchmark to NAR national community preferences survey 2023

SURVEY RESULTS

Selection of comments:

Support/Need for housing diversity, affordable, smaller units, in walkable areas:

I am a single dad with one child and stuck in a 5 bedroom house. I want to stay in UA for the schools and community, but **there is no where a small family can move** if they prefer a detached house.

Higher density **townhomes and duplexes sounds great**. I'm on board with multifamily rental, but would like it to be held to a **high architectural standard**. Definitely like walkable neighborhoods...some of the oldest parts of UA are the most walkable...would be great if new development would return to some of those planning principles.

I am not entirely opposed to apartments, but think **reasonably-priced condos, townhomes and ADUs would satisfy more people** looking to move into the neighborhood.

I'm a teacher in the school district and so is my wife. We can barely afford to live here. We choose to live here because we love it and we grew up here and want to raise our children here. While we understand that this is an affluent community, **it'd be really nice to see some of the new homes being built, be homes that are affordable to teachers** in the community.

UA is great, but it's so expensive. Once our children graduate, I don't know that we'll stay here. Would **prefer to find a newer, smaller house that doesn't need the maintenance** in a community that is either more affordable with the walkability and/or more diverse.

I am **continually frustrated by the destruction of older homes, often ranch style, to be replaced** by huge two story homes, ruining the feel of the neighborhood and replacing (somewhat) affordable homes with much pricier homes which certainly cost more to build, heat, cool and maintain.

Concern about infrastructure strains

I have noticed traffic, parking, and congestion have become increasingly difficult over the past decade, and **as we build more high density housing those will only get worse**.

I am actually planning on moving in a year or two. Looking for a patio home somewhere else. **UA is overbuilt, has traffic issues and excessive taxes**.

Don't see housing affordability as an issue

There is nothing wrong. **It is okay to have high housing costs in a desirable community**.

Opportunities for Further Study

Explore areas where allowing neighborhood-scale density will create new housing opportunities

As a landlocked community, meeting growth targets will require intensification of land use. For example, one-for-one replacement of single-family housing will not create new housing options for all stages of life. Upper Arlington should revise zoning to allow higher density infill, such as duplexes, quadplexes, and townhomes. New neighborhood-scale density will help increase housing supply while preserving walkability and local character or requiring subsidy.

Economic rationale: Adjusting allowable density in zoning regulations can significantly improve housing attainability by enabling organic, locally-led infill development that operates on market-rate economics. Higher density infill development enhances the tax base and improves the efficiency of existing infrastructure and services.

Community support: Survey participants were vocal about wanting housing options that extend beyond detached single-family homes. These responses align with a zoning revision that would facilitate mixed-use and infill development. While there is support for increased density, many residents also stressed that any new development should respect the existing scale and design of their neighborhoods.

Community survey comments call for "higher density townhomes and duplexes sounds great" and "reasonably-priced condos, townhomes, and ADUs" underscoring need for options.

New Small Single Family
One home on a 0.2 acre lot
$1.4M sale price
$470K income to afford

New Townhomes
Four homes on a 0.5 acre lot
$780K sale price / unit
$260K income to afford

Image credit: South Bend Neighborhood Infill Catalog

Support Senior Housing

Upper Arlington should continue to pursue a multifamily approach to senior housing that encompasses both a basic independent living model and an enhanced service offering. The City is encouraged to support projects designed to meet diverse income levels and service needs and integrate amenities such as senior-centric commercial spaces, community centers, and structured parking.

Larger-scale senior living developments with different offerings for different needs and income levels can effectively address a decade's worth of potential downsizing needs within the community.

For Upper Arlington, a "multifamily" model of senior living with a strong sense of community in a park-like setting is appropriate with the following considerations:
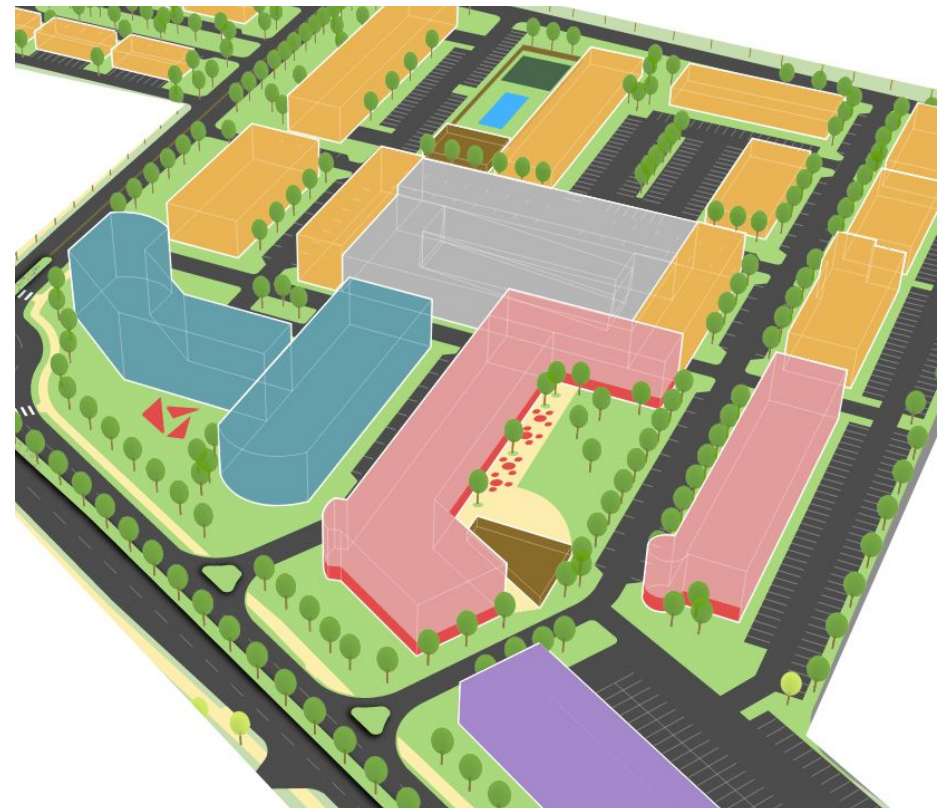
- 80-120 units on a 1-3 acre lot
- 600-1000 sq ft typical unit size, some larger units
- Achieve rents of $1,300-$1,500 per month with tax credits, $2,200 per month for independent living, and $3,000 per month with more services.

Image credit: National Church Residences Assisted Living Facility

Large-Scale Multifamily as a Component of Transformational Redevelopment

The City should cultivate opportunities and time the market to seize the benefits of co-locating rental housing with commercial uses in transformation mixed-use projects, such as the successful collaboration with The Kingston and the Community Center. With multifamily as a core element of a holistic redevelopment strategy, the City can create much needed market-rate rental housing, a walkable environment, and expanded tax revenue from integrated commercial development.

For example, the Envision Henderson plan (shaped by input from over 900 residents) demonstrates how multifamily can effectively complement new office, streetscape enhancements, and open space amenities. The Northern Gateway, as imagined here, is planned to be a lively mixed-use district, brimming with activity, and serving as a welcoming gateway to Upper Arlington. The draft program of uses balances housing with commercial to create a live-work neighborhood.

The plan specifically calls out merge community goals for housing along with fiscal sustainability. While large-scale multifamily needs public subsidy today, the recommendation is to cultivate opportunities such as Envision Henderson where the City's investment in multifamily can contribute to a wider mixed-use project and achieve the City's housing goals.

Image credit: Envision Henderson (draft)

Housing Market Detailed Analysis
City of Upper Arlington