2025 HOUSING STUDY

Fairfield County and Lancaster, Ohio

November 25, 2025

FAIRFIELD
COUNTY · OHIO
SERVE · CONNECT · PROTECT

This page is left intentionally blank.

2025 HOUSING STUDY

Fairfield County and Lancaster, Ohio
November 25, 2025

PREPARED BY

Fairfield County Department of Economic Development

City of Lancaster, OH

Lancaster Port Authority

with assistance from

Ninigret Partners
Planning NEXT

ACKNOWLEDGMENTS

INTRODUCTION

Fairfield County is entering a period of dynamic growth, driven by new investment, expanding industry, and the strong economic momentum of the Columbus Region in central Ohio. With more jobs and residents on the horizon, the county faces an important question: how can we grow responsibly, ensuring that housing meets the needs of our workforce and families while preserving the community character and farmland that define us?

This housing study was undertaken to better understand those needs and to guide decision-making as the county plans for the future. The study reviewed the existing housing supply and identified gaps across income levels and housing types, revealing that not all residents have access to housing options that fit their budgets or lifestyles. It also examined how the county's current housing stock can be improved, adapted, or repurposed to meet changing needs, recognizing that meeting future demand will require not just building new homes, but making better use of what already exists.

The findings emphasize the importance of a balanced approach: one that encourages reinvestment in existing neighborhoods, and supports infill and new development.

Fairfield County's leaders, together with regional and local partners, are committed to ensuring that growth benefits the entire community. Every worker, teachers, first responders, tradespeople, and healthcare professionals and families alike should have the option to live near where they work. Longtime residents should be able to remain in the county as they age in housing that is safe and appropriate. And new residents attracted by economic growth should find attainable, high-quality housing choices that fit their needs.

Ultimately, this study provides a foundation for responsible, informed growth, helping Fairfield County protect taxpayers, preserve agricultural heritage, and ensure that its housing supply supports a vibrant, inclusive future for all who call the county home.

This page is left intentionally blank.

CONTENTS

EXECUTIVE SUMMARY

1

1.1. WHAT WE LEARNED AND WHAT IT MEANS TO FAIRFIELD COUNTY AND LANCASTER

Fairfield County and its local jurisdictions are facing several key elements that will be driving the housing market over the next several years. Population growth, demographic shifts, age of housing stock, and the rising cost of new housing construction are creating needs that will shape the future of the county's housing market.

Projected Population Growth : The midrange estimate of population forecasts from the state and the Mid-Ohio Regional Planning Commission (MORPC) estimate an additional 21,000 people will live in the county by 2035. This translates to approximately 5,200 new households. To address population growth, it is estimated that approximately 5,200 net new housing units, primarily single family, will be required by 2035. For a stable housing market where prices do not escalate as rapidly as they have in the last several years, there needs to be some "excess" in the market. Price stable housing markets typically have vacancy rates in the 5% to 7% range.

Demographic Shifts & Aging Housing Stock. This assessment found 16,000 households with occupants over the age of 65, including 13,000 homeowners and 3,000 renters. In Lancaster, the largest single group of homeowners falls between the ages of 65 to 74. These statistics suggest an era of residential change, primarily driven by an aging population, is coming to Fairfield County and Lancaster regardless of population growth.

One of the challenges that accompanies the aging population is the aging housing stock. Sixty-six percent of this age cohort live in housing older than 1990 – 4,900 live in housing built before 1970. The condition of this housing stock as it becomes available needs to be considered in terms of being able to meet the demand for housing.

There are also internal demographic shifts to consider that impact housing demand. Changes in marital status are expected to result in approximately 400 new households annually. Additionally, with a one percent house downsizing rate, well below historic norms, about 96 units will be vacated each year. Furthermore, the aging population will also trigger the need for some forms of supported living. Based on population projections for individuals with two or more Activities of Daily Living (ADLs) limitations, an additional 350 to 450 assisted living units will be needed out to the 2035, which translates to 35 to 45 units annually.

Affordability: Affordability (more than 30% of income goes towards housing costs) issues are primarily concentrated among households aged 65 and older (homeowners and renters), as well as very low-income renters (VLI). The research indicates that these homeowners and renters have average yearly incomes below $35,000. For very low-income renters, the primary issue is the lack of units (estimated at 1,200) at rents they can afford given their incomes levels. To meet this need would require significant subsidies potentially between $300 million to $450 million.

New ownership is increasingly difficult. For example, the historic income level (~$50,000) that translates from renting to homeownership is no longer feasible due to the current elevated home prices for new construction and existing housing. This shift may increase demand for family-sized rental units (2+ bedrooms) and delay moving to homeownership.

Housing "Need": All of the above dynamics translate to household need and how the interplay between these variables creates the dynamics that shape the housing market.

Based on these factors Fairfield County will need:

- ~600 units per year to address forecasted population growth and promote housing price stability
- ~500 units per year to address demographic shifts such as divorce, downsizing and inability to remain at home
- 1,200 units to address low-income affordability over a multi-year period

It is important to note other factors not taken into consideration when calculating these estimates. For example, there is a need to rehabilitate or replace 600 existing units that are in disrepair. 1,600 units remain vacant for reasons that are currently unknown. Furthermore, there are 2,600 units listed as in fair condition; assuming a one percent annual decline, 26 units will fall into poor condition each year.

Existing Housing Can Address Some of the Need

Some of this housing need will be met by the existing housing stock particularly as some portion of the 16,000 aged 65+ residents of Fairfield County leave their housing over the next decade. But, as noted earlier the quality of this housing stock in terms of being able to meet some of this need needs to be considered.

New Housing Construction Is Required

New housing construction will be required. It will be required to provide housing types that don't presently exist such as downsizing ownership options, new family-sized housing, replacement of older housing stock that may be too expensive to update, and multifamily housing construction to relieve economic pressure on the rental market.

1.2 WHAT DO WE DO? CAN WE FIX IT?

Cost to Construction. To manage the current housing concerns, it is important to consider several factors impacting both ownership and renting. To effectively support infill and new subdivision construction, it is essential to address the cost structure of housing construction. This includes tackling issues related to land costs, streamlining the development process, optimizing construction practices, evaluating the cost of capital, and improving the rate of return on investments. A comprehensive examination of these elements can provide critical insights for stakeholders in the housing market.

COST STRUCTURE OF NEW HOUSING CONSTRUCTION			
	Representative Elements	**Tools to Address Each Element**	**Potential Options for Fairfield / Lancaster**
Land Costs	• $ / Acre	• Land banks • Land grants • Density	• Use of land banks • Strategic land acquisitions
Development Process	• Soft costs • Developer fees • Regulatory	• Clear entitlements • Pre-permitted approval process • Staff vs commission approvals • Public fee waivers	• Review & revamp process • Patterns books & architectural designs (especially for infill) • Review tie-in fees especially for "middle housing" and denser projects
Construction	• Land prep • Infrastructure • Materials • Labor	• Denisty / unit size • Infrastructure funding • Construction method • Material choices • Labor type • Tax waivers	• Shovel ready land • Building code flexibility (if possible)
Cost of Capital	• Grants • Loans • Equity • Shadow equity	• Typical sources (credits, etc.) • "Patient" debt • PRI investments	• Shovel ready land • Scattered site TIF for infill • County bond
Rate of Return	• Operating margin • Return on capital	• Tax structure • Capital stack mix	• Create a county CDC? • CIC / Port Authority "developer" option?

Promote Housing Diversity & Flexibility. Promoting flexibility in housing types is crucial to enhancing market appeal. In an environment characterized by uncertainty regarding interest rates, aging infrastructure, economic fluctuations, and changing family dynamics, it is vital to ensure that new housing developments offer adaptability to meet various demographic needs. For instance, although "senior" housing may currently be in high demand from a developer's perspective, it is important for new developments to also appeal to other demographic groups as market demands evolve. Providing developers with examples of successful project types can facilitate this thought process.

Promote Missing Middle Housing. The establishment of a Missing Middle House Policy is necessary to address the new construction housing needs that fall between large lot single-family and large-scale multi-family homes. This initiative should begin with a thorough policy audit that examines zoning regulations, building codes, and infrastructure fees. Collaborating with developers to identify key issues related to constructing missing middle housing will be essential in developing supportive programs and policies.
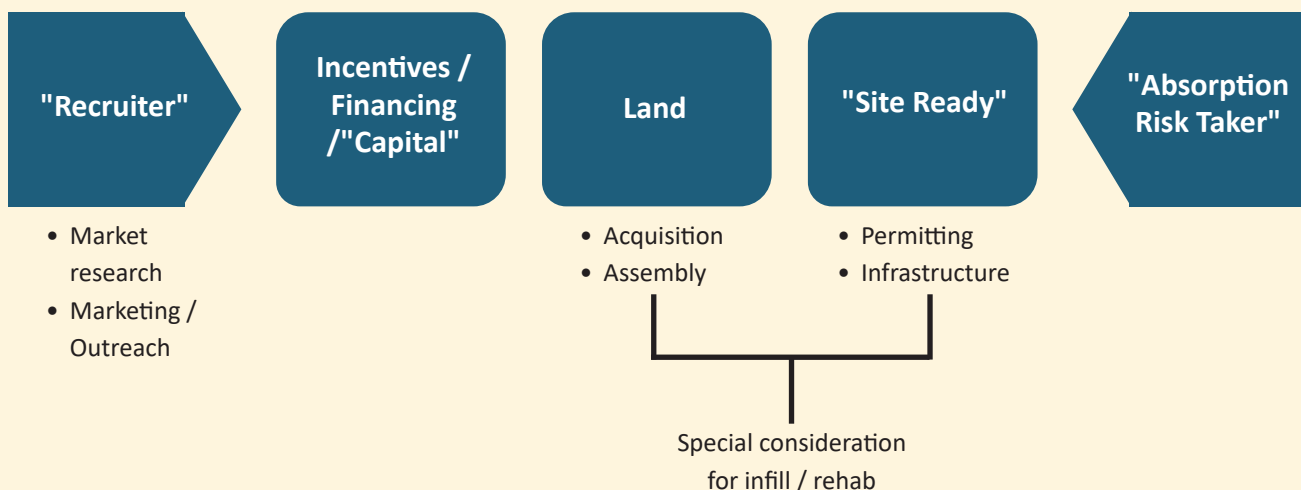
Create a NOAH Program. Concerns regarding affordability may be alleviated through the implementation of a NOAH (Naturally Occurring Affordable Housing) program for both ownership and rental properties. These properties tend to be older housing structures that are less expensive to purchase or rent. An initiative like this could include targeted acquisitions directly or through partnerships, enhanced code enforcement, rehabilitation funding approaches without federal funds, an ownership models that provide alternative approaches to sustainable home ownership.

Rehabilitate Older Housing. More housing can become viable through keeping older homes competitive for ownership. To maintain competitiveness among older homes and existing homesites, it is important to revisit zoning rules surrounding setbacks, lot coverage, height limits, parking, and density. Providing incentives to offset associated expenses could alleviate the pressure to build more housing structures, potentially preserving farmland.

Organize the Resources. Organizing the available resources is essential for ensuring that the housing ecosystem comprises the appropriate mix of public and private entities capable of addressing the needs of communities. This includes construction labor. It may be necessary to explore the role of current entities or the need for a new organization tasked with overseeing housing issues across Fairfield County and Lancaster, promoting proactive development strategies to meet future housing demands.

"Proactive" Development: A continuum of Possibilities

One of the main considerations for this method is to consider who would take on the role of being a champion for this method of development. Options for this could include the LFCCA, Community Improvement Corporation, Community Development Corporation, or the Port Authority.

"Recruiter"	Incentives / Financing /"Capital"	Land	"Site Ready"	"Absorption Risk Taker"
• Market research • Marketing / Outreach		• Acquisition • Assembly	• Permitting • Infrastructure	

Special consideration for infill / rehab

STATE OF HOUSING

2

2.1   SUMMARY OF KEY STATISTICS

Many factors impact what housing is available. Understanding what exists today, what factors are bringing change, and how to align housing needs with what development occurs are essential to realizing a housing market that best serves Fairfield County residents, present and future.

There are a total of 60,000 housing units within Fairfield County and Lancaster, with a vacancy rate of three percent. Five percent of single-family homes are owned by individuals considered "non-locals." The average size of single-family homes is 1,812 square feet, while the median size is 1,704 square feet (source: County Assessors data). Homes built since 2010 exhibit an average size of 2,408 square feet, and preliminary data indicate that homes in Lancaster have an average size of 1,536 square feet. More than half of the housing stock in the county was built before 1990, and ranch-style homes make up thirty-three percent of the single-family housing inventory. (source: County Assessors data).

The average household size in the county is 2.68 people. The fastest-growing segment of the population is individuals aged 65 and older, with an average household size of 1.6 people. County-wide, there are two percent more children enrolled in public schools than in fiscal year 2010, while the housing stock has increased by 14.5% over the same time frame.

Housing prices have accelerated significantly in the last three years, outpacing historic trends. Shifting demographics are expected to play an important role in shaping housing moving forward in terms of demand and availability. Additionally, significant ownership affordability issues, along with emerging rental housing mismatches, are exacerbating affordability concerns within the rental market.

For additional information see Appendix A.1. Unless otherwise noted American Community Survey (herein ACS) primary source of housing data along with county assessors and county GIS .
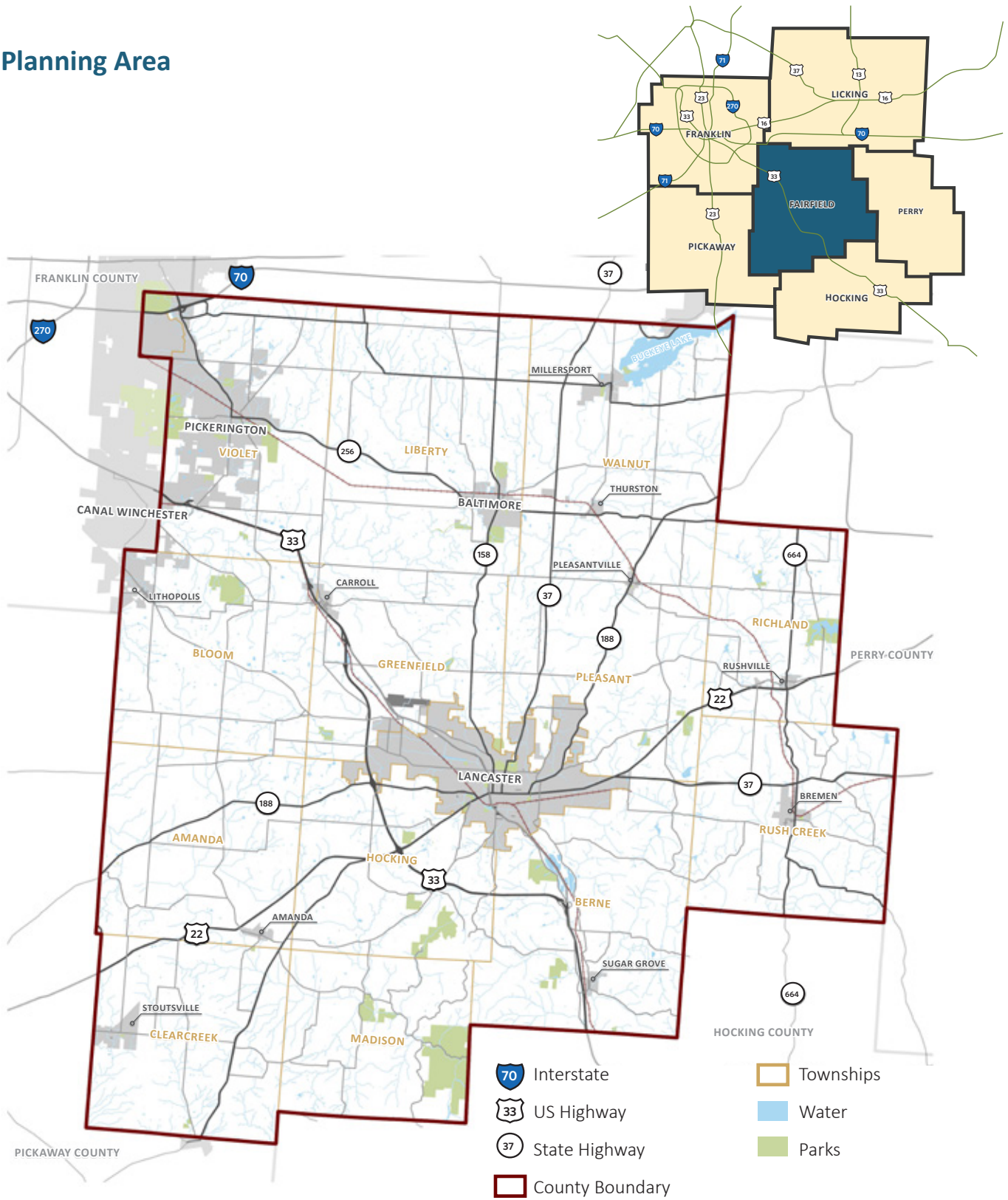
Zillow For Sale Market

This snapshot of the Zillow market in Fairfield County was collected from data that was available on September 18th, 2025. This data provides a baseline understanding of the current conditions of the housing market in the County.

- Asking price is $357,000, which is up 1.3% over last year
- Houses for sale are pending in 7 days
- 41 .6% sell for over the listed asking price
- 39.7% sell for under the listed asking price

Below are Zillow estimated housing valuations of the for sale market in certain municipalities within Fairfield County

- Lancaster: $269,000
- Carroll: $423,000
- Baltimore: $394,000
- Canal Winchester: $413,000
- Pleasantville: $293,000

Source: Zillow Market Reports

Planning Area

Legend:
- 70 Interstate
- 33 US Highway
- 37 State Highway
- County Boundary
- Townships
- Water
- Parks

2.2 DRIVERS OF CHANGE

Residential change is poised to impact Fairfield County and Lancaster significantly over the next 10 to 15 years, driven by demographic shifts in the region. Many of the existing older housing structures are aligned with the aging population within the county, situated in communities that may lack the financial and organizational support for rehabilitation efforts. The situation raises several critical questions: Is the existing housing desirable in terms of features and size, and can it address the prevailing affordability challenges within the community? Is it possible to upgrade these homes' affordably, or will they become increasingly dilapidated? Lastly, will housing trends shift from ownership to rental because of rising costs and smaller household? Addressing these questions will be key in shaping the future of Fairfield County and Lancaster's residential landscape.

Aging Populations. There is potential for a reshaping of the housing markets in Fairfield County and Lancaster, primarily driven by the needs of an aging population. Half of the homeowners in Fairfield County are over the age of 55. 55% of homeowners in Lancaster are over the age of 55, while nearly 3,000 renters are over the age of 65. Research indicates that 10,000 older housing units could undergo changes in ownership over the next 10 to 15 years based on the aging population. This figure exceeds the forecasted number of homes to be newly constructed in the same timeframe.

County Owner/Renters by Age
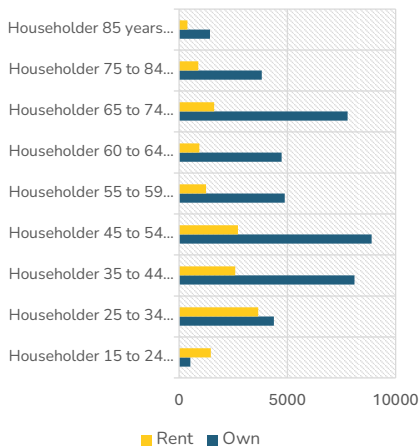
Lancaster Owner/Renters by Age
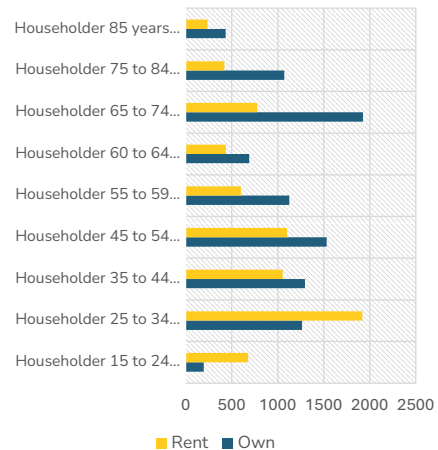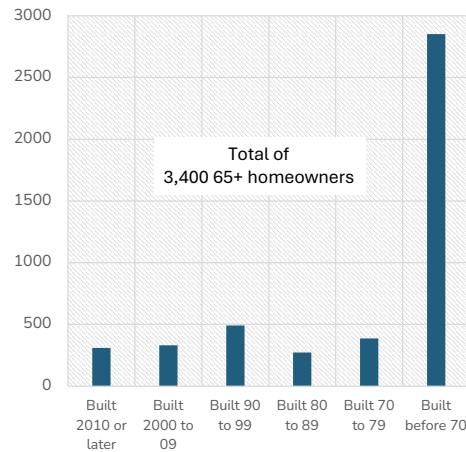

### Homeowner 65+ Year Structure Built County

66% live in housing built before 1990
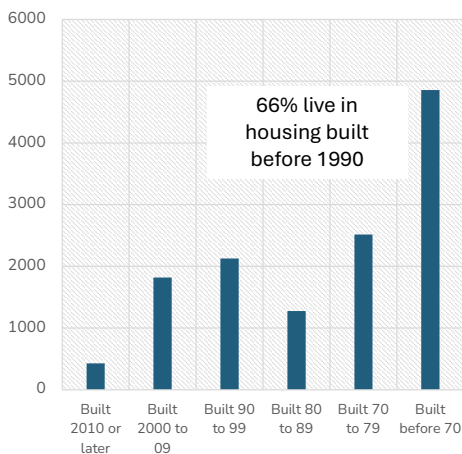
Homeowner 65+ Year Structure Built Lancaster


Total of 3,400 65+ homeowners

source for all graphs: NP analysis ACS 2023 5 year data)

Aging Housing Stock. 31,000 units, largely concentrated in Lancaster, will require substantial rehabilitation over the next 10 to 15 years based on their current condition. However, this raises the question of whether homeowners will have the resources to undertake these rehabilitation efforts. Approximately one percent of single-family housing stock equivalent to around 600 units is categorized as being in poor to unsound condition.(source: County Assessors data) Nearly 2,500 units are rated fair in condition, half of which were built before 1940. Examining these statistics together, it is important to note that the highest concentration of these homes overlaps with the lowest median income area in the county, emphasizing the need to prioritize both quality and affordability in these communities.

Homes in Fair or Worse Condition
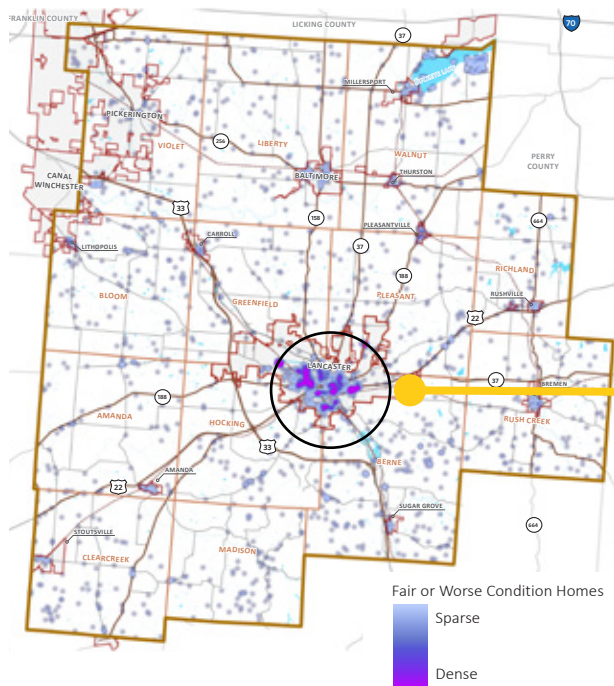
Median Household Income by Census Tract

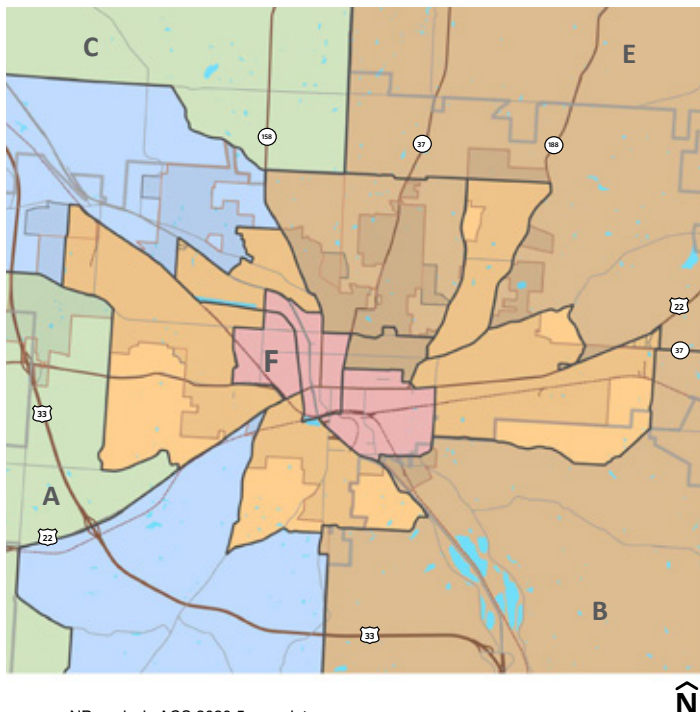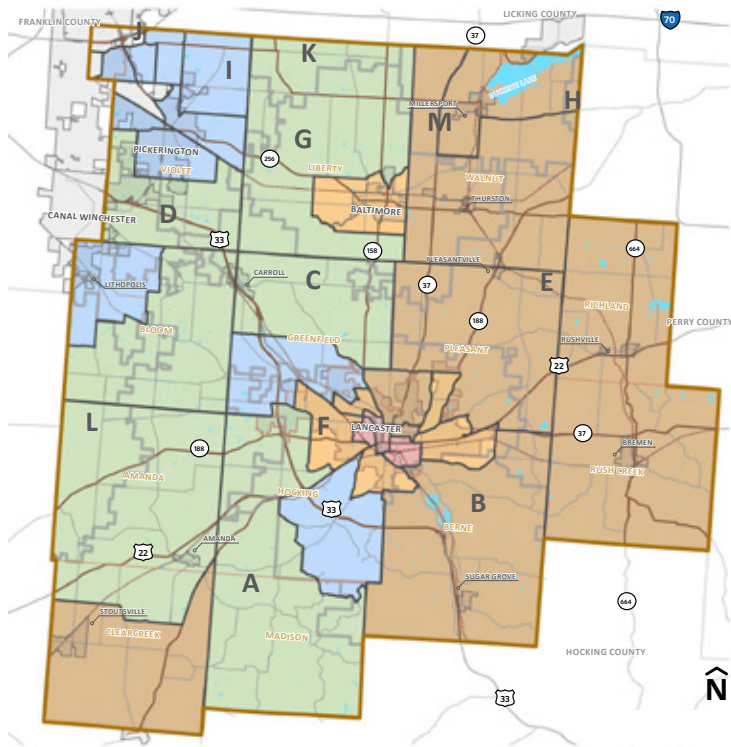Fair or Worse Condition Homes

Sparse

Dense

Median Household Income

Under $50k

$50k to $100k

Over $100k
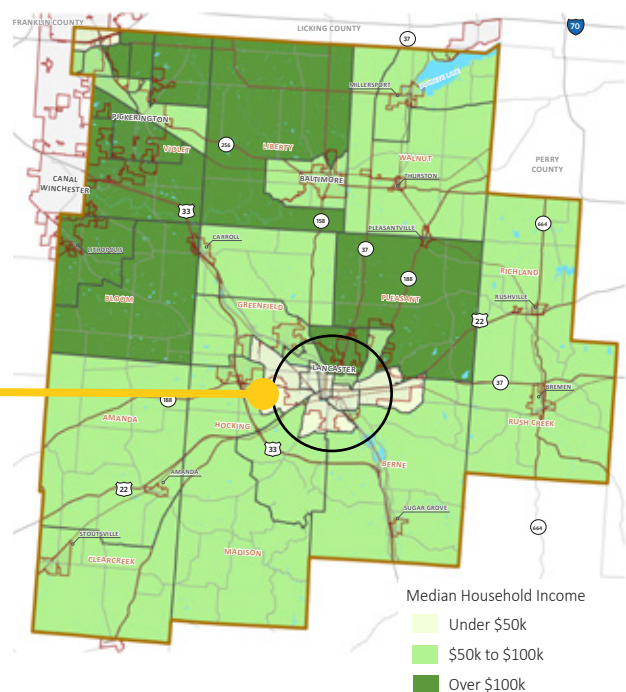
The highest concentration of fair or worse condition homes overlap with the lowest median household income census tracts in the county.

source:: NP analysis ACS 2023 5 year data & County Assessors data)

source:: NP analysis ACS 2023 5 year data

PROPENSITY TO CHANGE IN FAIRFIELD COUNTY AND LANCASTER

This measure of the County and Lancaster aims to measure the likelihood of the housing market to change within a certain area by looking at certain parameters that each area has. For this map, different school districts were measured for their propensity to shifts within the housing market.

The eastern portion of the county, specifically Lancaster and Baltimore, possess all of the characteristics that would create a high propensity for the housing market to change. Ten thousand aging housing units could change over the next ten to fifteen years based on the aging population base. This is a higher number than what is currently forecasted for new construction of housing units. School districts are also shown on these maps to provide further details on possible shifts that could happen in the tax base of each district. They are denoted by each letter, with the list being alphabetical for each school district in the County. Reference the Appendix for more information.

75% or more of the housing units are owner occupied

50% or more of the housing units were built before 1980

50% or more of the housing units were built before 1980 and 30% or more of the population is aged 60 or over

75% or more of the housing units are owner occupied and 30% or more of the population is aged 60 or over

75% or more of the housing units are owner occupied, 50% or more of the housing units were built before 1980, and 30% or more of the population is aged 60 or over

For additional information see Appendix A.2.

2.3   HOUSING AFFORDABILITY

Affordability is a multi-level issue that affects households in various ways, depending on factors such as age, residency status, homeownership, and relative income levels. It is imperative to clearly define and measure the size and scope of the affordability problem to understand its nuances. For existing residents, data indicates a significant affordability issue, particularly among individuals aged 65 and older as well as low-income renters; however, the response to each group's challenges is different. Potential new residents face difficulties when attempting to purchase a home given the current housing price points, especially those earning below the median income. While existing homes may be more accessible, they often require upgrades to meet the current lifestyle expectations. Recognizing that affordability is not a "one-size-fits-all" will help direct the appropriate responses to meeting the specific needs of Fairfield County and Lancaster.

HUD AFFORDABILITY THRESHOLDS AMI (2024)				
	1 person	**2 people**	**3 people**	**4 people**
30% Limits	$21,700	$24,800	$27,900	$31,000
Very Low Income	**$36,200**	**$41,350**	$46,500	$51,650
60% Limits	$43,440	$49,620	$55,800	$61,980
Low Income	$57,900	$66,150	$74,400	$82,650

Older Demographics in the County.

In the County, 49% of the households in the 65 or older age demographic group have incomes below $35,000 a year. However, they only represent 30% of the total households withinin the County. This points to a larger trend of the older population groups being the poorest populations in Fairfield County.

FAIRFIELD COUNTY HOUSEHOLDS BY AGE DEMOGRAPHIC AND INCOME							
	<25	**25-34**	**35-44**	**45-54**	**55-64**	**65-74**	**75+**
Number of Households	1,640	8,200	10,709	11,212	11,719	10,310	8,130
Under $35,000	501	1,017	974	953	1,635	2,120	2,676
Under $50,000	758	1,706	1,637	1,517	2,396	3,196	3,969
<$25,000	320	543	493	600	1,060	1,320	1,582
$25,000-$34,999	181	474	481	353	575	800	1,174
$35,000-$49,999	257	689	663	564	761	1,076	1,293
$50,000-$74,999	377	1,612	1,766	1,655	1,977	2,142	1,645

**All income groups in this chart are potentially eligible for housing assistance, depending on the household size

Source: ESRI Household Age and Income Profiles, 2023

When assessing eligibility thresholds across different regions, there are clear distinctions between Fairfield County and Lancaster. The median household income for Fairfield County is reported at $87,069, surpassing the housing assistance eligibility thresholds. In contrast, Lancaster's median household income is reported at $54,901, which falls within the 2024 affordability thresholds.
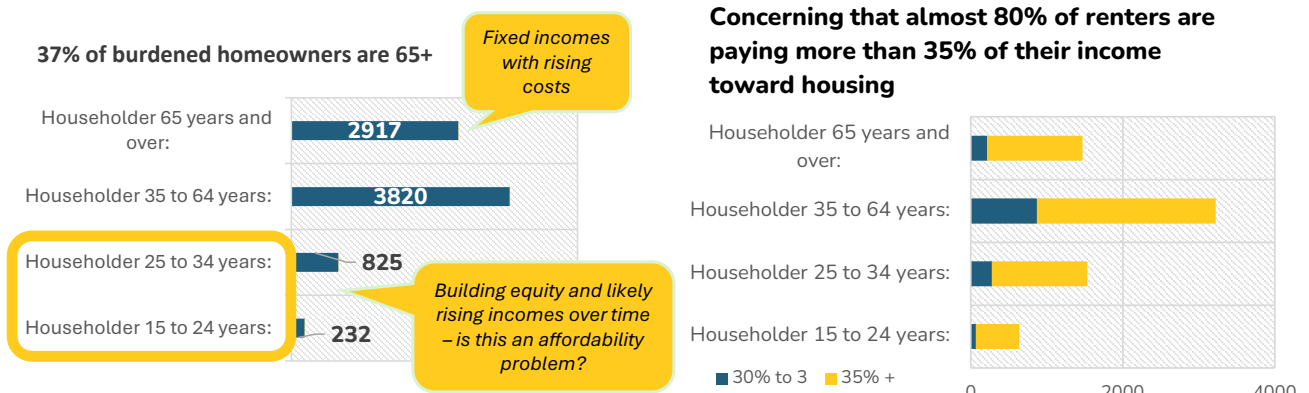

County Housing Status 2023 ACS 5 YR

Lancaster Housing Status 2023 ACS 5 YR
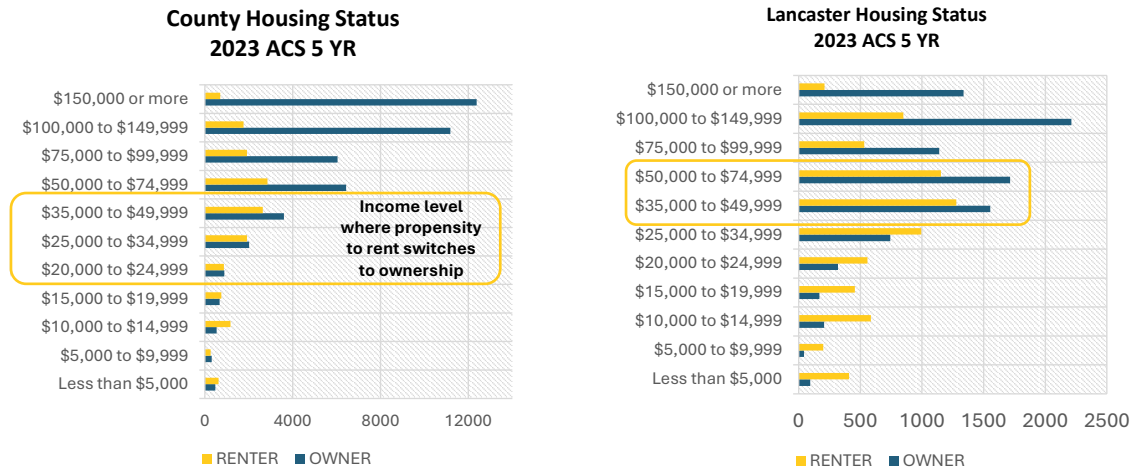
source:: NP analysis ACS 2023 5 year data

Demographic Shifts. In Fairfield County, individuals aged 65 and older constitute 30% of total households; notably, they also represent 49% of households with incomes under $35,000, indicating a substantial presence in the very low-income category. Additionally, around 11% of households in the 15 to 54 age demographic in Fairfield County may be eligible for housing assistance, as their incomes range between under $15,000 and $74,999; however, this is dependent on household size. Nearly 24% of households, approximately 15,000 units, are housing cost burdened. This means that residents allot 30% or more of their income to housing-related expenses. Further analysis indicates that 17% of homeowners are cost-burdened, in comparison to 47% of renters. While these rates are fairly typical, it is noteworthy that 53% of the cost-burdened households are homeowners. Overall, more than one-third of individuals are over the age of 65, have relatively low incomes, or fall into both categories.

37% of burdened homeowners are 65+

Fixed incomes with rising costs

Building equity and likely rising incomes over time – is this an affordability problem?

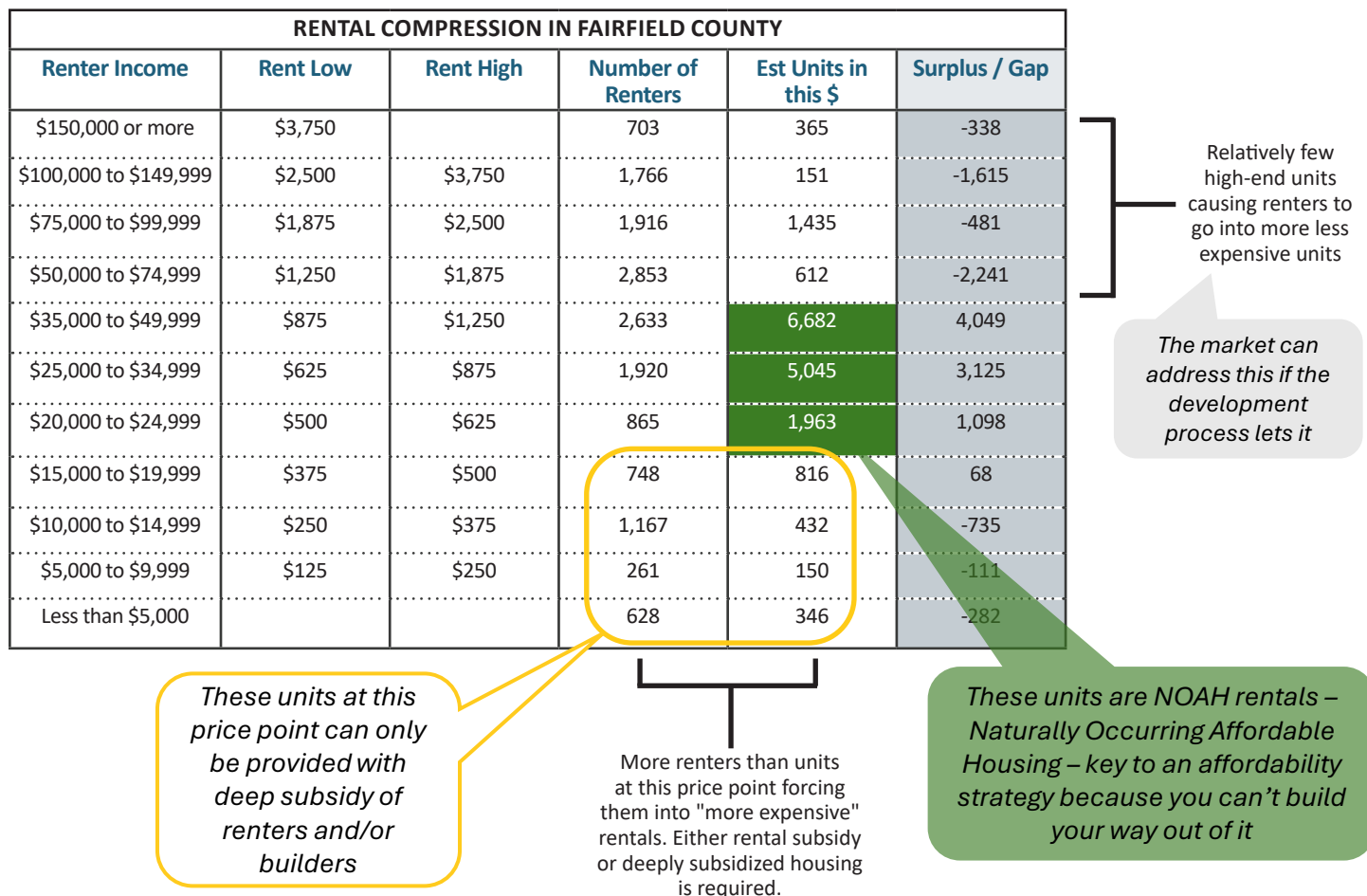**Concerning that almost 80% of renters are paying more than 35% of their income toward housing**

source:: NP analysis ACS 2023 5 year data

Housing Market's Affect on Rentals. Historically, lower housing prices with rising incomes enabled a smoother transition from renting to ownership. In Fairfield County this threshold was around $40,000 to $50,000 in income. However, this transition is no longer feasible due to the current elevated housing prices. The data indicates that this income switch level is higher in Lancaster than in other communities surveyed.

Renters are carrying a large percentage of housing cost burdens in the Fairfield County and Lancaster areas. 44% of renters, or approximately 6,800 renters in Fairfield County, are cost burdened; this is a decrease from 46% in 2018. 48% of renters, or approximately 3,300 renters in Lancaster, are facing housing cost burdens. To effectively address a significant portion of this need, it would be necessary to establish rental rates of less than $730 per month, which would align housing costs to 25% of the income for individuals earning around $35,000 annually.

It is presumed that rental compression is influencing the current rental housing market. When rental compression occurs, there are more renters than available units at certain price points, which forces individuals to seek out more expensive rentals. The limited availability of high-end units is further exacerbating the issue, leading renters to transition into lower-quality, more affordable rentals. This trend results in a pattern where rents increase across these lower-quality options, driven by higher-income households competing for housing and are therefore capable of outbidding their lower-income counterparts. In response to rental compression, there is an urgent need for either rental subsidies, deeply subsidized housing options, and/or new market rate rental options.

For additional information see Appendix A.3.

RENTAL COMPRESSION IN FAIRFIELD COUNTY					
Renter Income	**Rent Low**	**Rent High**	**Number of Renters**	**Est Units in this $**	**Surplus / Gap**
$150,000 or more	$3,750		703	365	-338
$100,000 to $149,999	$2,500	$3,750	1,766	151	-1,615
$75,000 to $99,999	$1,875	$2,500	1,916	1,435	-481
$50,000 to $74,999	$1,250	$1,875	2,853	612	-2,241
$35,000 to $49,999	$875	$1,250	2,633	6,682	4,049
$25,000 to $34,999	$625	$875	1,920	5,045	3,125
$20,000 to $24,999	$500	$625	865	1,963	1,098
$15,000 to $19,999	$375	$500	748	816	68
$10,000 to $14,999	$250	$375	1,167	432	-735
$5,000 to $9,999	$125	$250	261	150	-111
Less than $5,000			628	346	-282

Relatively few high-end units causing renters to go into more less expensive units

The market can address this if the development process lets it

These units at this price point can only be provided with deep subsidy of renters and/or builders

More renters than units at this price point forcing them into "more expensive" rentals. Either rental subsidy or deeply subsidized housing is required.

These units are NOAH rentals – Naturally Occurring Affordable Housing – key to an affordability strategy because you can't build your way out of it

source:: NP analysis ACS 2023 5 year data

2.4 ALIGNING HOUSING DEVELOPMENT WITH HOUSING NEEDS

To ensure a stable housing pricing market, it is crucial to balance new housing construction and value appreciation, preventing rapid price increases that could adversely affect both current residents (particularly fixed income homeowners) and future homeowners. The type and extent of housing growth are influenced by various factors, including sociodemographic shifts such as changes in marital status, age, and life stages, which create internal demands for housing even in the absence of population growth. This dynamic can exert pressure on specific types of housing, as the existing aging housing stock may fail to attract potential new residents. As local populations and workforces age, there is a pressing need to supplement them with new workers and consumers to sustain local businesses and maintain a non-residential tax base. Little growth is not a realistic option for those concerned about the community's economic health and revenue sources.

A Dynamic Market. The current residential market exhibits minimal slack, with only three percent of the housing stock classified as vacant. According to the most recent data from Zillow, homes are spending an average of just six days on the market. Typically, a healthy and stable market is characterized by an availability or vacancy rate of five to eight percent. The current figures show that the market is below this benchmark, with few housing options readily available. In recent years, Fairfield County has experienced significant instability in the pricing and valuation of its housing market. Given the limited availability of housing in the area, the supply of housing plays a crucial role in influencing the dynamics of housing costs.

Property Values & Housing Costs. According to the Federal All Transaction Housing Index, housing values have more than doubled since 2014, with a marked acceleration observed in the past several years. Additionally, the calculations for fair market rent used for Housing Choice Vouchers have witnessed a rapid increase, soaring by 75% over the last decade. This escalation in housing costs is likely a contributing factor to the ongoing housing affordability challenges faced by current residents in the area. Additionally, population growth is expected to make an impact on the availability and affordability of housing in these communities.
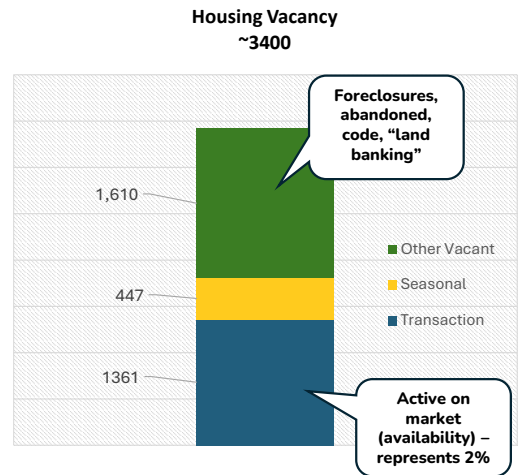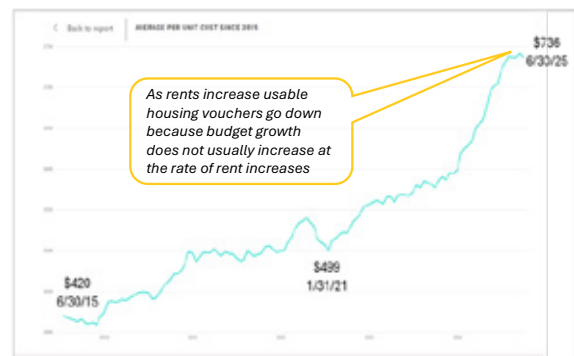

source:: NP analysis ACS 2023 5 year data
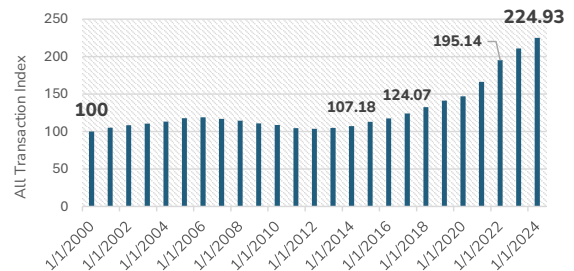
source: St Louis Federal Reserve OFHEO All Transaction Index

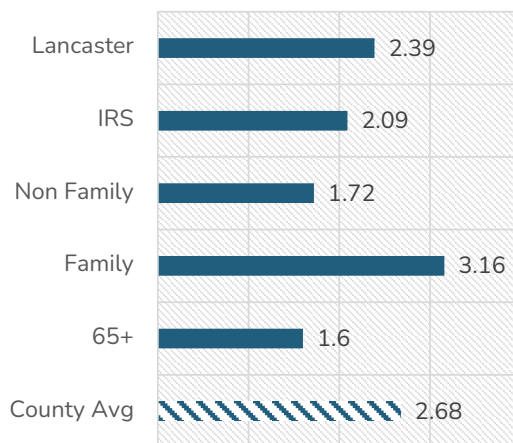source: HUD Choice Voucher Dashboard - Fairfield County

Housing Size Changes. The increase in housing size is another factor that contributes to the rising costs of housing. On average, new homes are 43% larger than the median size; this marks a 12% increase in size compared to homes built in the 2000s. This expansion in size since 2000 has added approximately $65,000 to the overall cost of new homes, based on a constant construction cost of $250 per square foot. Condominiums constructed during this period have been smaller than their single-family home counterparts, highlighting a distinctive trend in the housing market.

Population Influence. The extent of this growth varies significantly depending on the source; notably, one forecast estimates a growth rate that is twice as high as another. Currently, MORPC forecasts a growth rate of 18%, while the state anticipates a rate of eight percent, marking an average growth rate of 13%. While these figures may seem substantial, it is important to note that the annual growth rates are actually lower than those observed over the previous two decades.

Migration. The dynamics of housing supply and demand extend beyond population growth. Internal population movement within Fairfield County shows that approximately 10% of renters (around 1,400 individuals) and two percent of homeowners (approximately 1,100 individuals) relocate annually. According to 2022 IRS migration data, nearly 5,000 households leave Fairfield County each year, while an equivalent number move into the area, resulting in a net housing need exceeding 500 units. This movement underscores the complexity of the housing market, demonstrating that factors influencing housing demand are multifaceted and not solely reliant on population metrics.
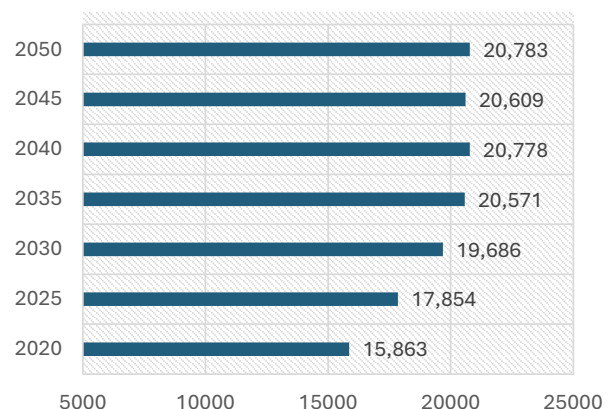
Sociodemographic Changes. Sociodemographic shifts—such as changes in marital status, age, and life stage—are contributing to the demand for diverse housing options independent of population changes. For instance, between 2018 and 2023, 4,200 individuals experienced separation or divorce in Fairfield County (source: ACS 2023), creating a need for 2,100 additional housing units. It is noteworthy that 30% of households in Fairfield County consist of individuals living alone, further illustrating the evolving landscape of housing needs in the region.

Wide range of household sizes in the county influence housing needs
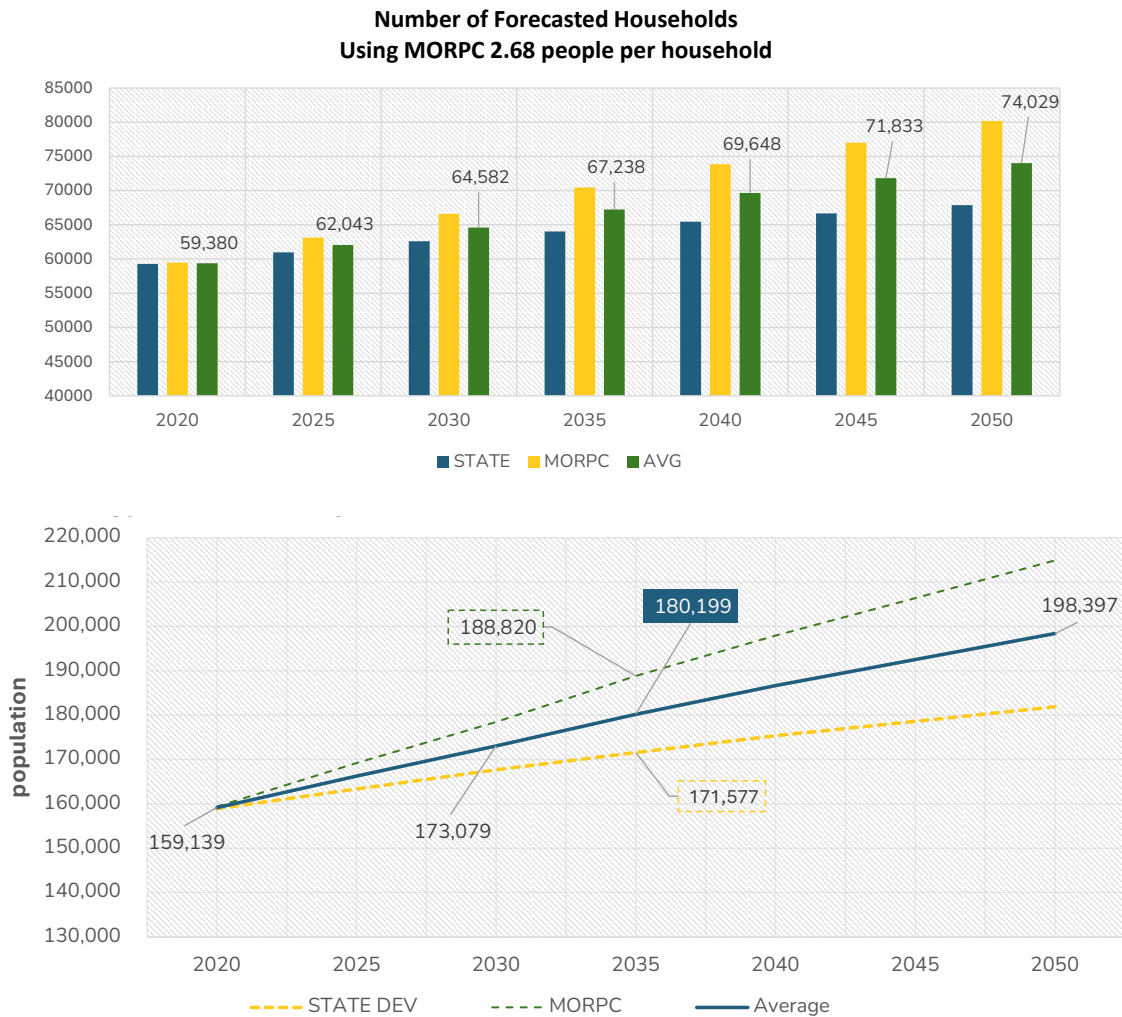
Category	Value
Lancaster	2.39
IRS	2.09
Non Family	1.72
Family	3.16
65+	1.6
County Avg	2.68

source: NP analysis ACS 2023 5 year data

Number of Forecasted 65+ Households Average Forecast

Year	Value
2050	20,783
2045	20,609
2040	20,778
2035	20,571
2030	19,686
2025	17,854
2020	15,863

source : NP analysis based on state of Ohio and MORPC forecasts

**Number of Forecasted Households
Using MORPC 2.68 people per household**

Legend: STATE, MORPC, AVG


Legend: STATE DEV, MORPC, Average

The 65 and older age cohort is expected to have a substantial impact on housing demand, particularly as its growth is projected to peak in 2040 before leveling off. This demographic is noteworthy because it exhibits a significantly different average household size compared to the county average, with the 65+ group representing an average of 1.6 individuals per household versus the county's 2.68. Based on these figures, it is estimated that there could be between 1,600 and 2,700 additional households consisting of individuals aged 65 and older by 2035. While most of this population is already housed, it is important to consider that this age group also has the highest divorce rate at 15% and a pronounced tendency to live alone, which could further influence housing dynamics in the future.

Resizing Housing Need: In the County, there exists a significant population of homeowners who are likely to be interested in "resizing" their living arrangements. There are approximately 9,600 owner-occupied households between the ages of 55 to 64 who may consider downsizing or resizing their homes, particularly in relation to home care responsibilities. A considerable portion of this demographic resides in the Pickerington area, which has seen the construction of larger homes over the past two decades. Historically, before the prevailing low-interest-rate environment, it has been noted that nationally, about 15% of homeowners typically opted to downsize. This is substantially lower given the price of housing, interest rates and lack of supply.

Independent Living. The ability to live independently is likely to influence demand for specific types of housing among the senior population. Currently, 19% of the estimated 65 and older population in the area, which amounts to approximately 3,762 individuals from a total of 19,800, requires assistance with two or more activities of daily living (ADLs). There are currently 941 assisted living units with certified capacity available to cater to this demographic (source: Ohio Department of Health). Forecasts indicate that an additional 350 to 450 assisted living units may be necessary in the future, assuming that the ratio of available units remains.

FAIRFIELD COUNTY AGE DEMOGRAPHIC CHANGE				
	65+	**Change**	**85+**	**Change**
2020	3,154		1,092	
2030	3,823	+669	1,313	+221
2040	4,234	+411	1,644	+331
2050	4,390	+156	1,918	+274

Source: Miami University Gerontology Center

How important is it for you to do the following as you age?
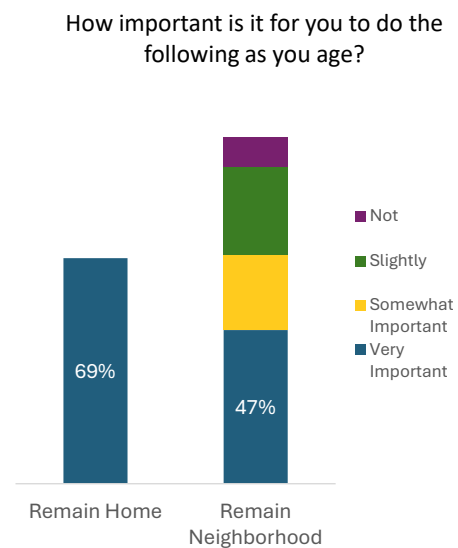
Source:
https://public.tableau.com/app/profile/christy.kranich/viz/CORAA2021/Ho me

The Age-Friendly Innovation Center (AFIC) at Ohio State University conducted research with populations of older adults that centered around making communities more age-friendly. In Fairfield County, they found that almost 70% of respondents feel that remaining in their home is very important to them as they age. Respondents generally felt that their housing had adequate facilities to accommodate the needs of aging people (i.e. first floor bathroom, laundry, bedroom). However, under 20% of respondents stated that their home had an accessible entryway. This, along with other factors of the housing market and stock, may create problems for future generations of homeowners as the older population grows and remains in their houses for longer periods of time.

For additional information see Appendix A.4.
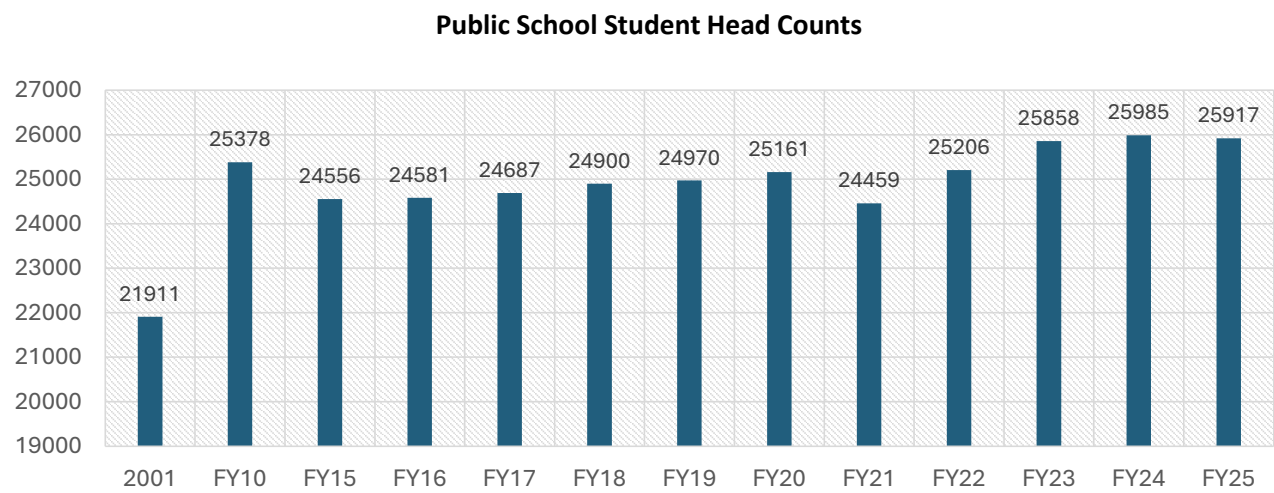
IMPACT OF HOUSING ON SCHOOLS

3

3. IMPACT OF HOUSING ON SCHOOLS

As demographics and household sizes change, so does the relationship between housing and school population. Understanding this relationship can help shape the community response to new housing construction

The notion that "more housing" directly correlates with an increase in the number of children in schools is not necessarily accurate, and substantial evidence disputes this claim. Research indicates that the design and size of housing units particularly bedrooms more significantly influence their ability to attract families with children.

Student Population in the County. Countywide public school enrollment has seen an increase. However, this growth has occurred at a slower rate compared to overall population increases, household formations, and household growth. Since 2010, the number of students in public schools has increased by less than 600, a mere two percent increase across the county. In comparison, the population has increased by 21,000, or 14.5%, and the number of housing units has also grown by approximately 8,000, representing a 14.8% increase. These findings suggest that the demand for housing is not translating into a proportional rise in school enrollment.

District Growth & Housing. School district growth has varied significantly throughout Fairfield County and Lancaster. Notably, only three districts have surpassed their student counts from 2001. In the case of Lancaster schools, enrollment reached its peak in 2020; however, it aligns closely with its historic average of 6,220 students. Other indicators suggest that the increase in housing to accommodate household growth is not correlated with an increase in the number of children enrolled in public schools. According to data from the American Community Survey (ACS), households with children saw an increase of less than 1% over five years, in contrast to the overall growth of all households, which rose by 8% during the same timeframe. Additionally, the percentage of children in public schools relative to the total population is approaching all-time lows.

Public School Student Head Counts

https://education.ohio.gov/Topics/Data/Frequently-Requested-Data/Enrollment-Data

FY25 student counts as percentage of other years

Multi-Family Housing. The data from the Lancaster school district aligns with findings from Hilliard and Upper Arlington, indicating that multi-family housing (MFH) does not significantly contribute to student enrollment. The overall yield from MFH in Lancaster is 23 students per 100 units, while Hilliard reports a yield of 21 students per 100 units. However, recent developments in Lancaster have shown a markedly lower yield of only 6 students per 100 units. Similarly, large unit counts of MFH in Upper Arlington also demonstrate the same yield of 6 students per 100 units. In contrast, single-family housing in Lancaster suggests a yield of 38 students per 100 units. In Upper Arlington, the student yield from single-family homes varies from 30 to 69 students per 100 units, with an average yield of 49 students per 100 units.

For additional information see Appendix A.5.

Student Counts/Unit LSD 2025
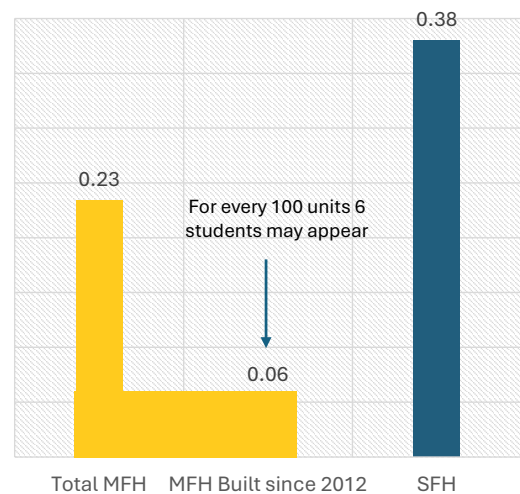
source: NP analysis of LSD attendance data by address

LANCASTER'S ROLE IN COUNTY HOUSING

4

4.1 LANCASTER'S HOUSING DYNAMICS

Lancaster plays an important role in the dynamics of the Fairfield County housing stock. The relationship between the factors that influence the market and the housing needs of the County have a symbiotic relationship between Lancaster and the County.

According to the ACS, Lancaster has approximately 18,600 housing units, representing 29% of the county's housing stock. There are approximately 16,700 households, which suggests approximately 1,900 vacant units in the city. About 50% of the vacant housing units are in some state of potential use, meaning actively for sale or for rent

Fifty-seven percent of Lancaster households own their homes, which is a substantially lower percentage than the county at 74%. One potential contributor to this is the number of people living alone in Lancaster. Thirty-six percent of households in the city are for people living alone versus 23% across the county.

Drivers of residential change and impact on Lancaster. The drivers of residential change across the county will also impact Lancaster, and in some cases may have a larger impact on the city than the county.

- Aging populations: More than 3,000 homeowner households (36%) in Lancaster are over the age of 65 compared to 29% countywide.
- Aging housing stock: Seventy percent of all housing in Lancaster was built before 1980 compared to 47% countywide. 6,600 of owner-occupied homes in Lancaster were built before 1980. Thirty-seven percent (2,400) of these homes are owned by households over the age of 65.
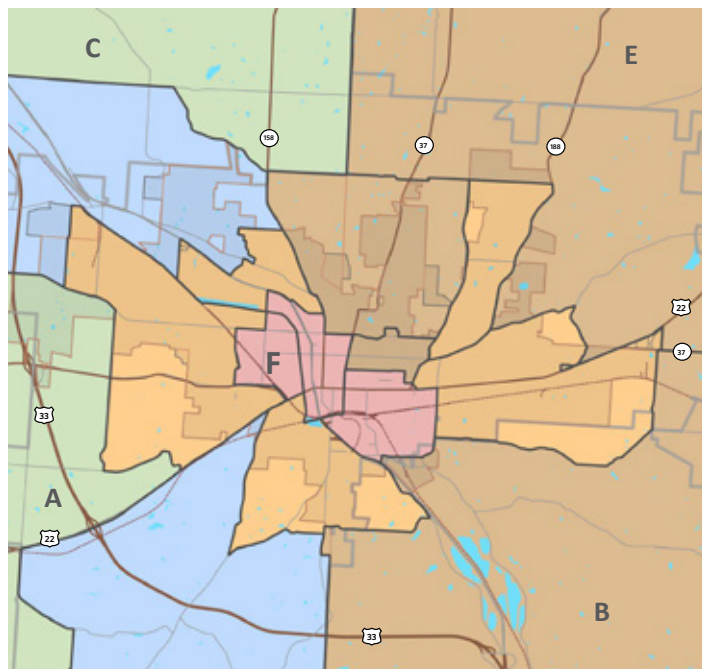
75% or more of the housing units are owner occupied

50% or more of the housing units were built before 1980

50% or more of the housing units were built before 1980 and 30% or more of the population is aged 60 or over

75% or more of the housing units are owner occupied and 30% or more of the population is aged 60 or over

75% or more of the housing units are owner occupied, 50% or more of the housing units were built before 1980, and 30% or more of the population is aged 60 or over

*Reference Appendix for the corresponding school districts

This combination of aging housing stock and aging ownership is exacerbated by the state of Lancaster's housing stock. As noted previously, most of the housing stock across county considered in fair or poor condition is in Lancaster. It also appears to be concentrated in parts of the city that have some of the lowest incomes in the county, raising questions about the ability to reinvest in the housing stock.

Additionally, it appears that a portion of these homes are not owned locally. The combination of aging homeowners and the presence of investor-owned housing creates questions about the future balance between homeowners and renters in several of Lancaster's neighborhoods with high propensity to change.

Affordability Considerations. Housing affordability is the intersection of income and housing costs. Thirty percent of income allocated toward housing costs is typically considered demonstrating "housing cost burden." Twenty-four percent of households are cost burdened in the county. Lancaster is 31%. Rental costs are the principal driver of affordability statistics. For Fairfield County 44% of rental households face some level of cost burden versus 18% of homeowners. A slightly higher percentage of Lancaster renters (46%) are cost burdened and 19% of homeowners. The geographic spread of the housing cost burden raises some interesting questions for Lancaster and the County.

The rental cost compression issue identified for the county also impacts Lancaster rentals. Lancaster is 47% of the rentals across the county. Building new rental units at market rates may help address some of the challenges related to market demand. Lancaster is also an important part of the naturally occurring affordable housing (NOAH) stock across the county, 63% of NOAH rentals (rents for incomes between $21,000 and $34,000) are in Lancaster. The median housing price of $269,000 is within range of the median household income of $84,000v but out of range for the median household in Lancaster. The biggest challenge for affordability is income differences between Lancaster and the County. Lancaster incomes levels are below the county and less concentrated in higher income categories. Given these income levels a substantial portion of Lancaster's households will be challenged to find housing aligned with their incomes.

Lancaster Homes in Fair or Worse Condition

Fair or Worse Condition Homes
- Sparse
- Dense
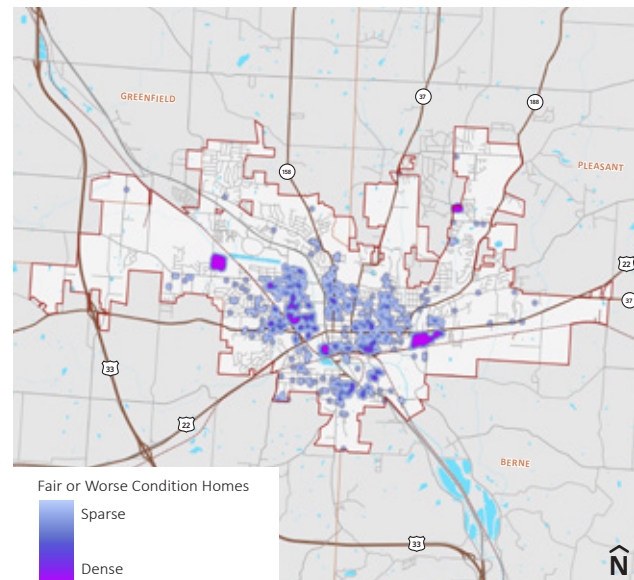
Lancaster Single-Family Homes Owned Non-Locally

- Single-family homes owned by American Homes 4 Rent
- Single-family homes owned by other non-local owners
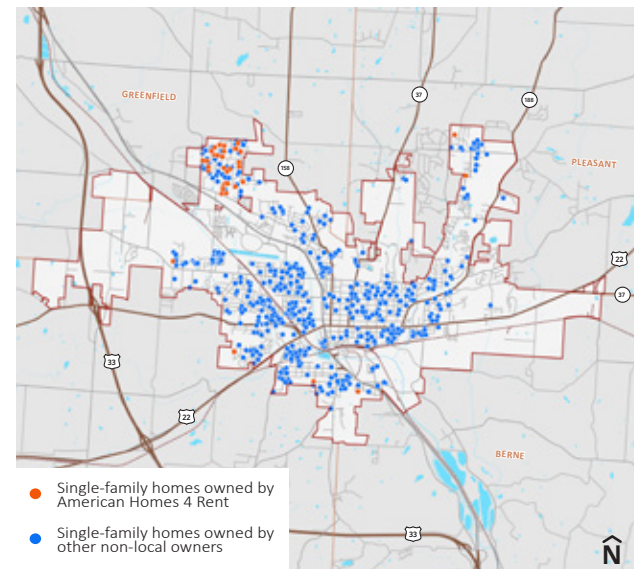
PERCENTAGE OF HOUSEHOLDS TO COST BURDEN	
Lancaster % of All Households	29%
Lancaster % of Rental Burden Cost Households	48%
Lancaster % of Ownership with Cost Burden	24%

4.2 LANCASTER'S HOUSING NEEDS

Addressing an Aging Population. As noted earlier, the aging population is going to play a key role in shaping the future housing market. Approximately 5,000 households are 65+ and nearly 3000 are between 55 to 64.
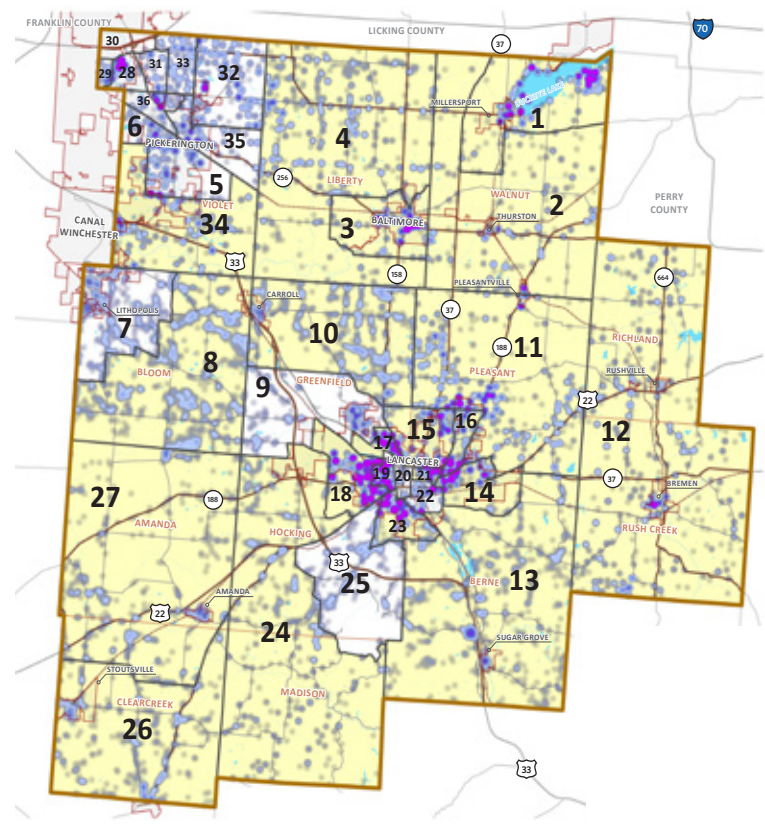
**Lancaster Age Distribution Percentage of Population**
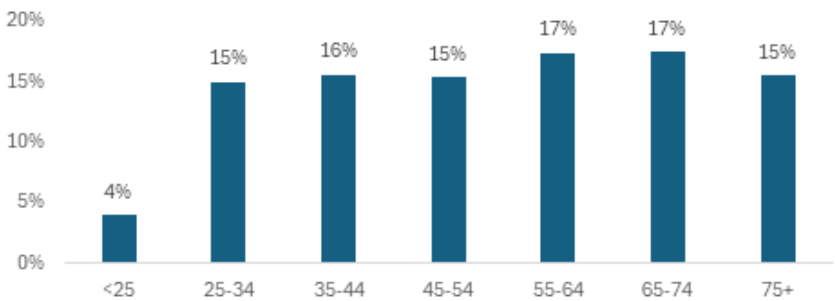
This demographic impact will come in several forms and described in greater detail in the countywide report:

- Aging in place
- Downsizing and wanting to stay in Lancaster
- Housing turnover and the quality of this housing stock

Concentration of ranch homes and the population that is 60 or older.

One advantage for Lancaster is the concentration of ranch-style housing which can more easily accommodate accessibility and aging-in-place efforts because of their single level form. A key question as noted earlier will be their physical condition and level of maintenance.

Sparse

Dense

Census Tract where 30% or more of the population is 60 years or older
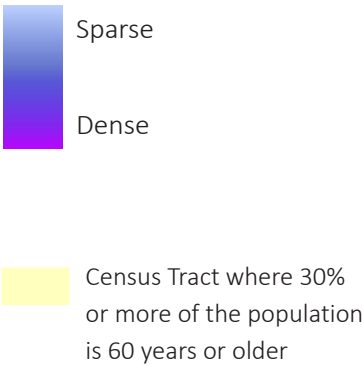
source: NP analysis of ACS & County Assessor data

County-wide Growth and Lancaster. How much the projected population growth will occur in Lancaster is unclear and there is not an easily accessible forecast at a community level like what is available at the county level. Lancaster represents 27.9% of the households across the county. In 2018 Lancaster represented 29.2% of the county. Moreover, the county population grew by 5.7% versus 2.4% . Using a proportionate allocation of the average forecast described in the countywide report, if Lancaster maintained itself at 28% of the county's households this would translate to needing to add at least 135 units a year until 2035 after new construction needs would slow.

**Potential New Households based on Average
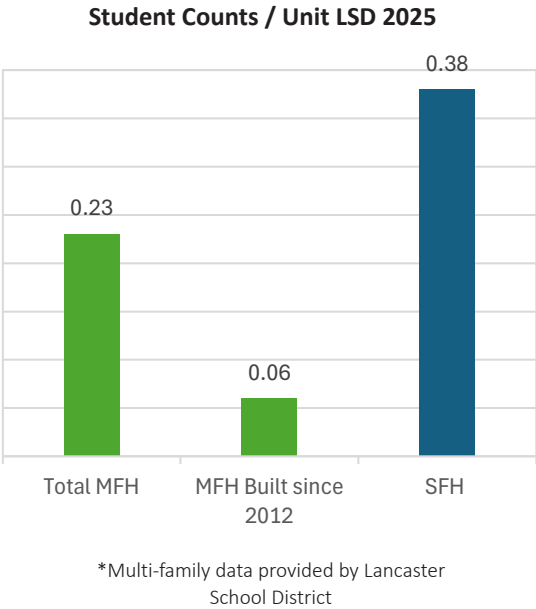Lancaster = 28% of County**
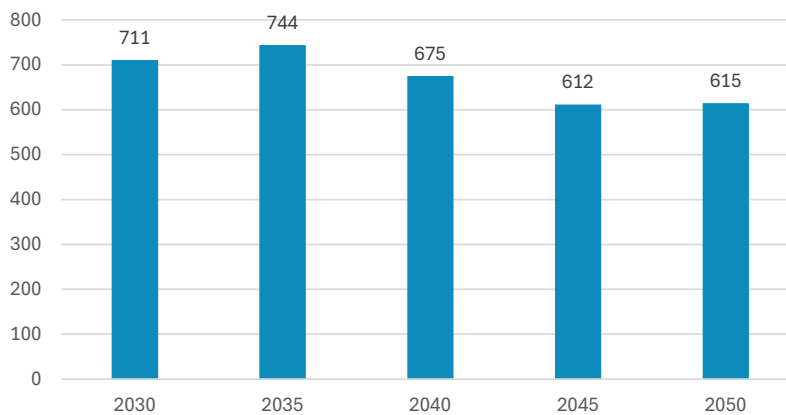
Lancaster would also be subject to some other shifts such as population migration and divorce which influence demand for housing. However, the information available for this has very high margins of error.

Housing and the Impact on Schools. There are 18,471 housing units in this school district, with 17,678 single-family units and 793 multi-family units.

Lancaster City School District Residential Land Use
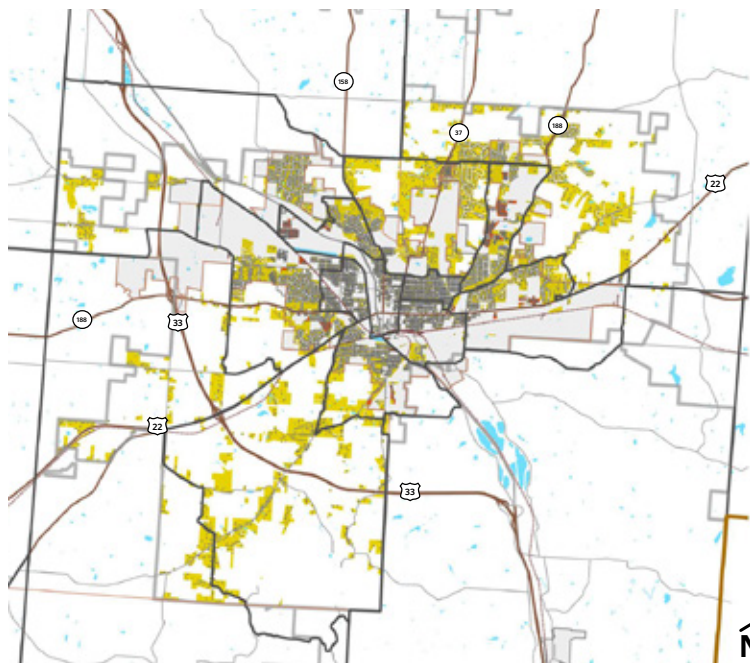
Information was provided by the Lancaster School District to help determine the impact of multifamily housing on student enrollment. As noted from the countywide report the data from the Lancaster school district aligns with findings from Hilliard and Upper Arlington, indicating that multi-family housing (MFH) does not significantly contribute to student enrollment. The overall yield from MFH in Lancaster is 23 students per 100 units, while Hilliard reports a yield of 21 students per 100 units. However, recent developments in Lancaster have shown a markedly lower yield of only 6 students per 100 units. Similarly, large unit counts of MFH in Upper Arlington also demonstrate the same yield of 6 students per 100 units. In contrast, single-family housing in Lancaster suggests a yield of 38 students per 100 units. In Upper Arlington, the student yield from single-family homes varies from 30 to 69 students per 100 units, with an average yield of 49 students per 100 units.

Student Counts / Unit LSD 2025

*Multi-family data provided by Lancaster School District

This page is left intentionally blank.

APPENDIX 5

SUPPLEMENTAL INFORMATION
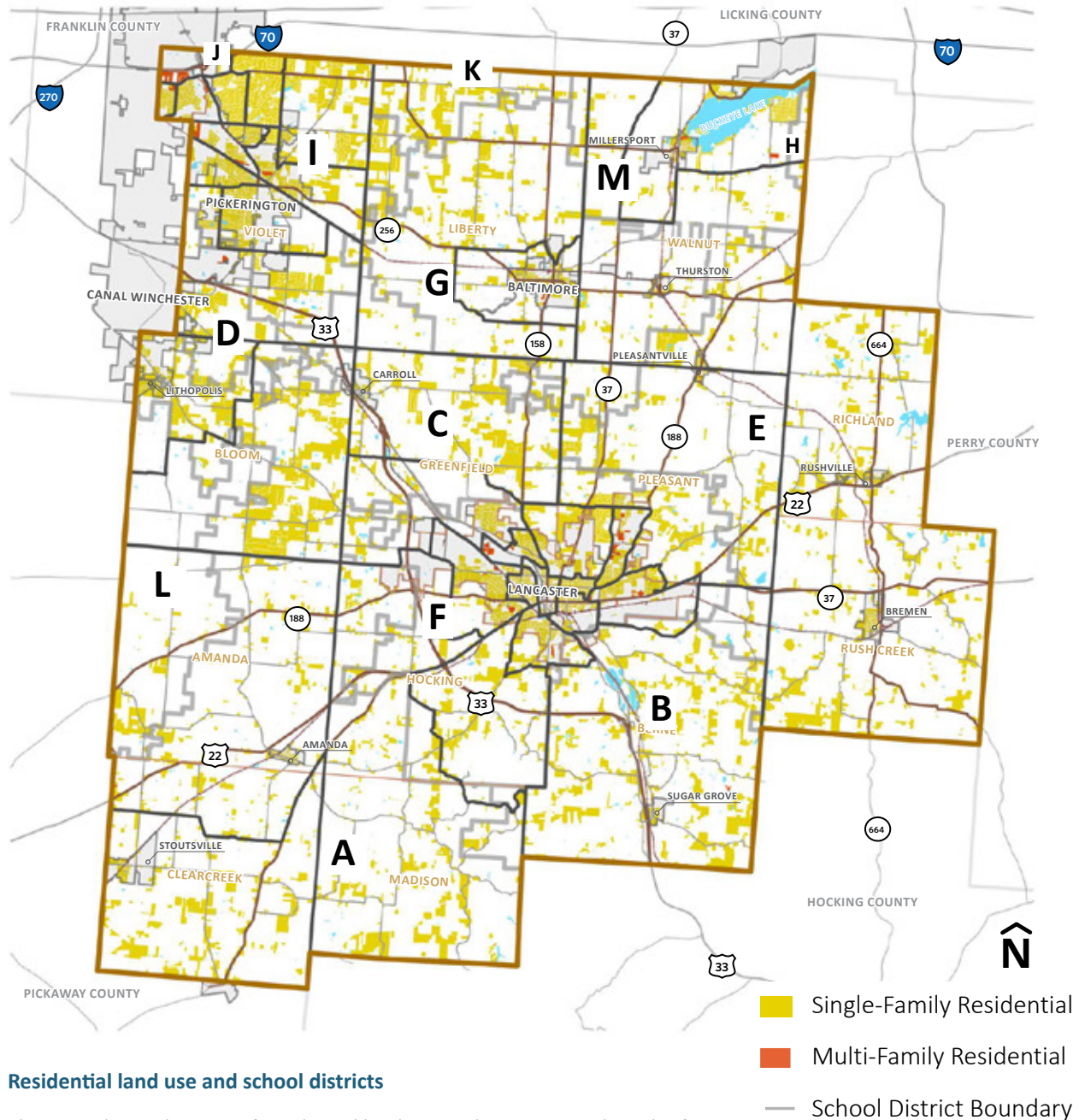
The following pages detail additional reports or exhibits that were conducted for this study.

APPENDIX A

Supplemental Information

A.1 Supplemental Information to Section 2.1 Summary of Key Statistics

Residential land use and school districts

This map shows the area of residential land use in the county, with each of the school districts overlayed. School districts are denoted by each letter, with the list being alphabetical for each school district in Fairfield County.
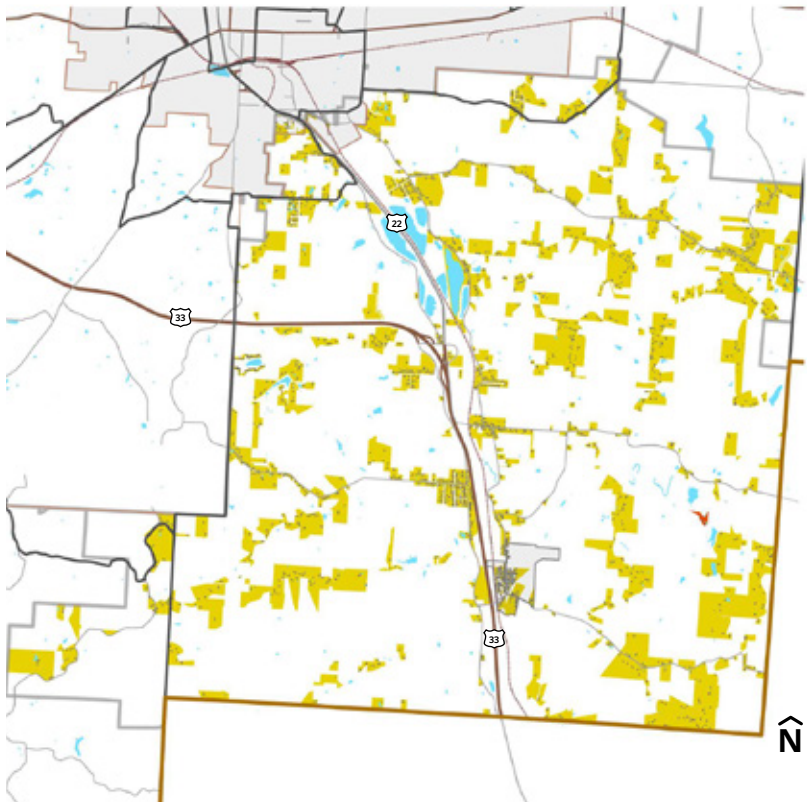
A. Amanda Clearcreek School District

There are 3,328 housing units in this school district, with 3,284 single-family units and 44 multi-family units.
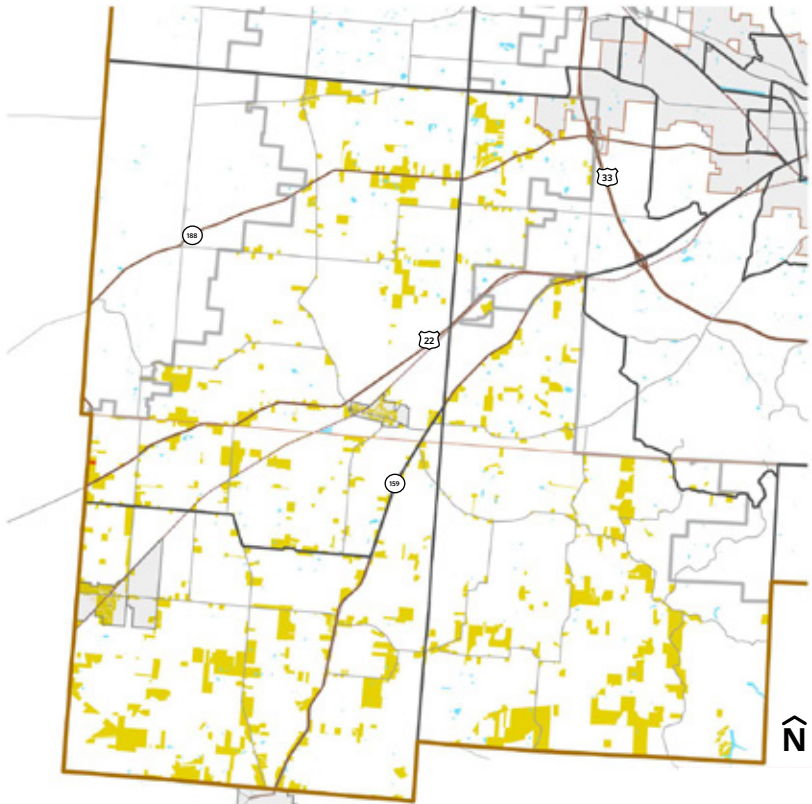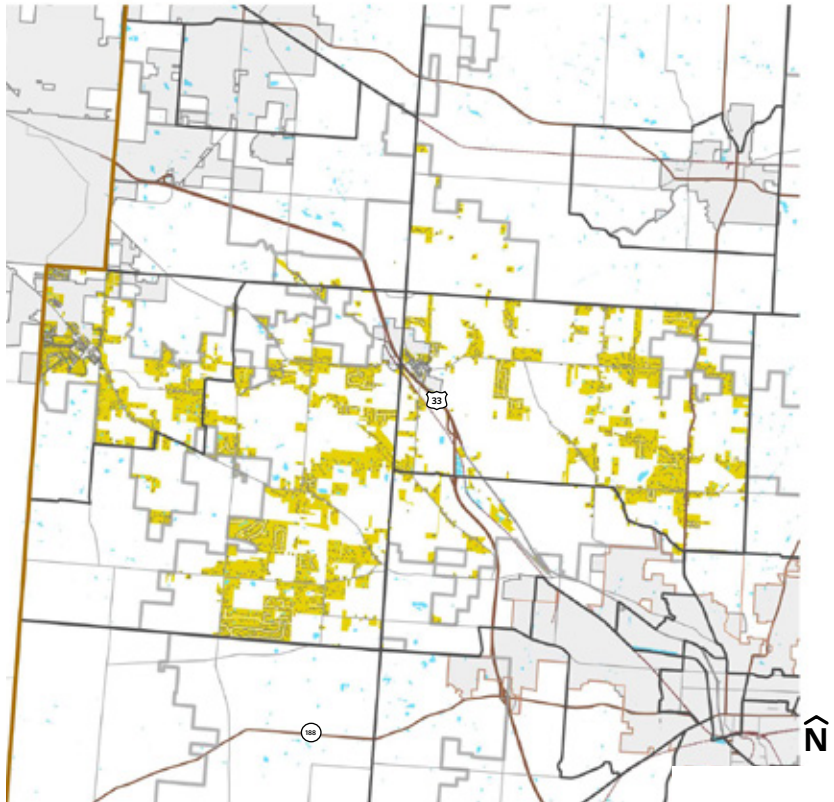

B. Berne Union School District

There are 1,928 housing units in this school district, with 1,905 single-family units and 23 multi-family units.
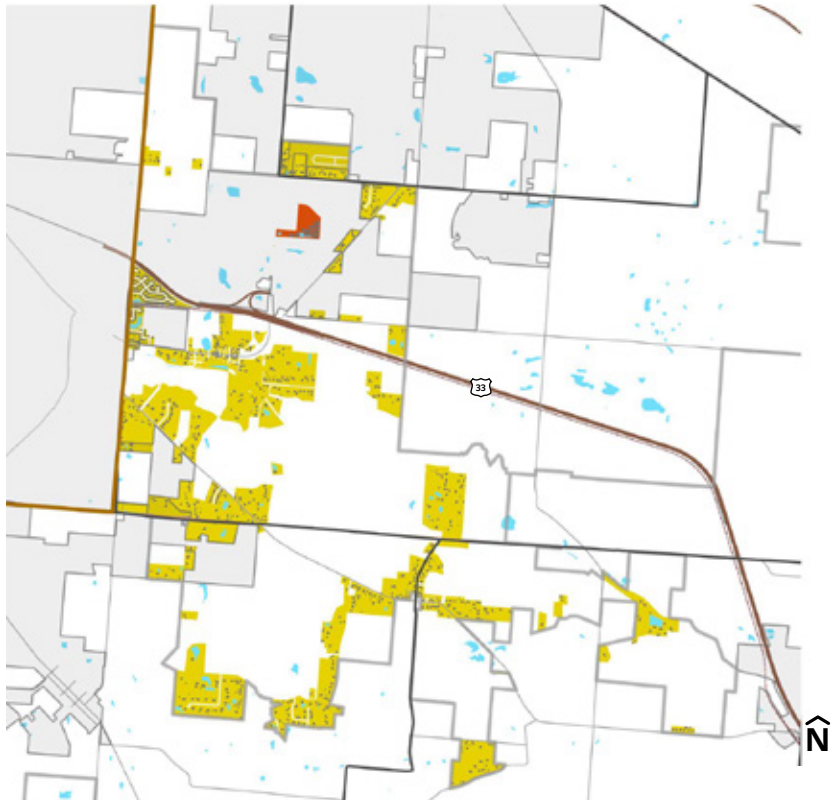
C. Bloom Carroll School District

There are 4,979 housing units in this school district, with 4,934 single-family units and 45 multi-family units.
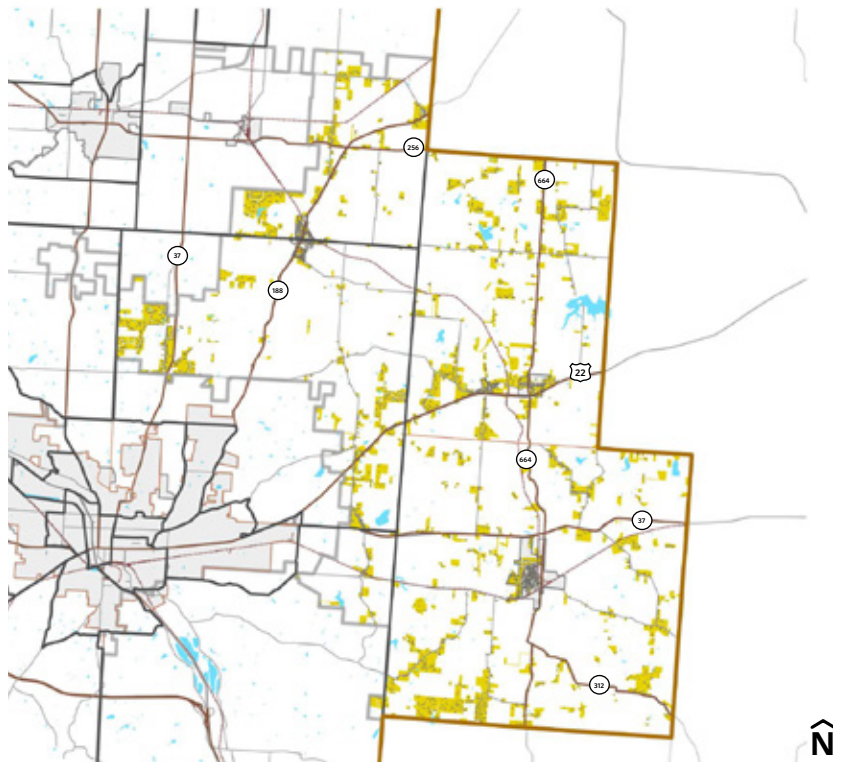

D. Canal Winchester School District

There are 995 housing units in this school district, with 992 single-family units and 3 multi-family units.
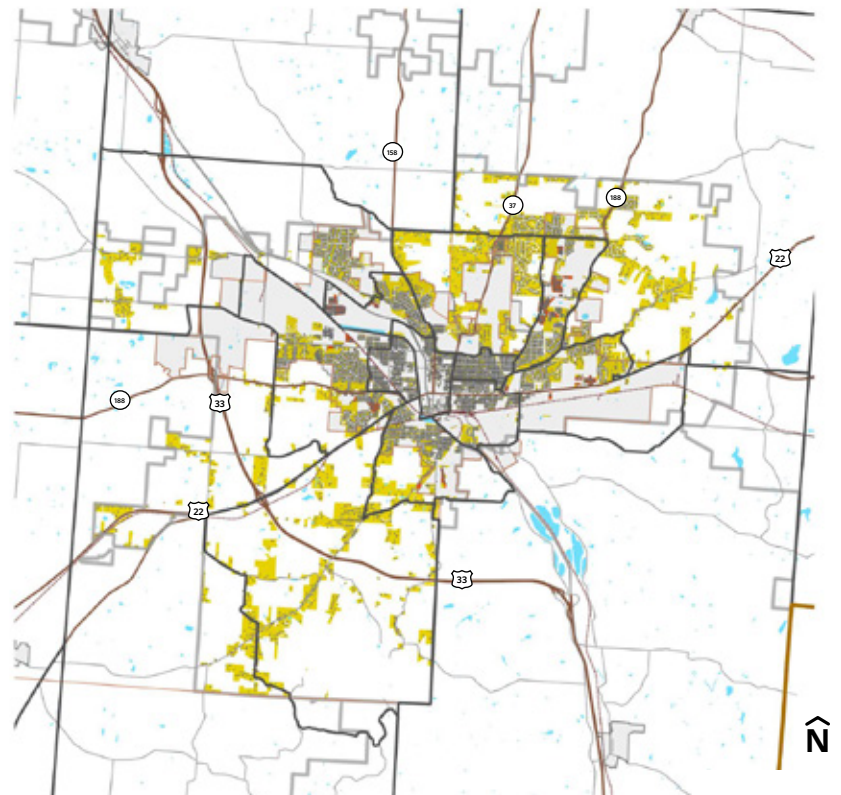
E. Fairfield Union School District

There are 4,281 housing units in this school district, with 4,250 single-family units and 31 multi-family units.
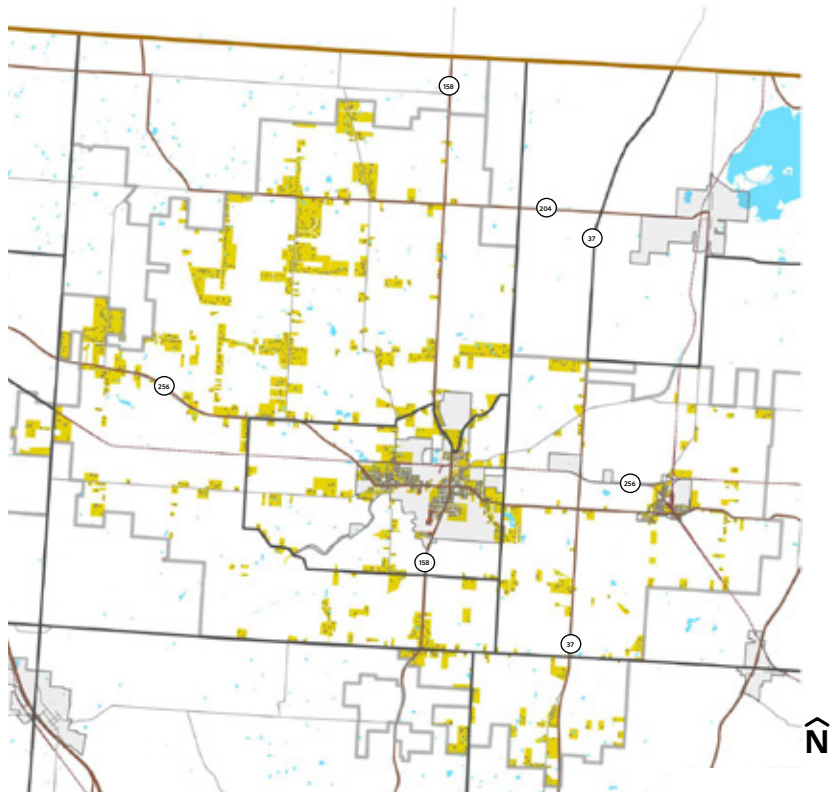

F. Lancaster City School District

There are 18,471 housing units in this school district, with 17,678 single-family units and 793 multi-family units.
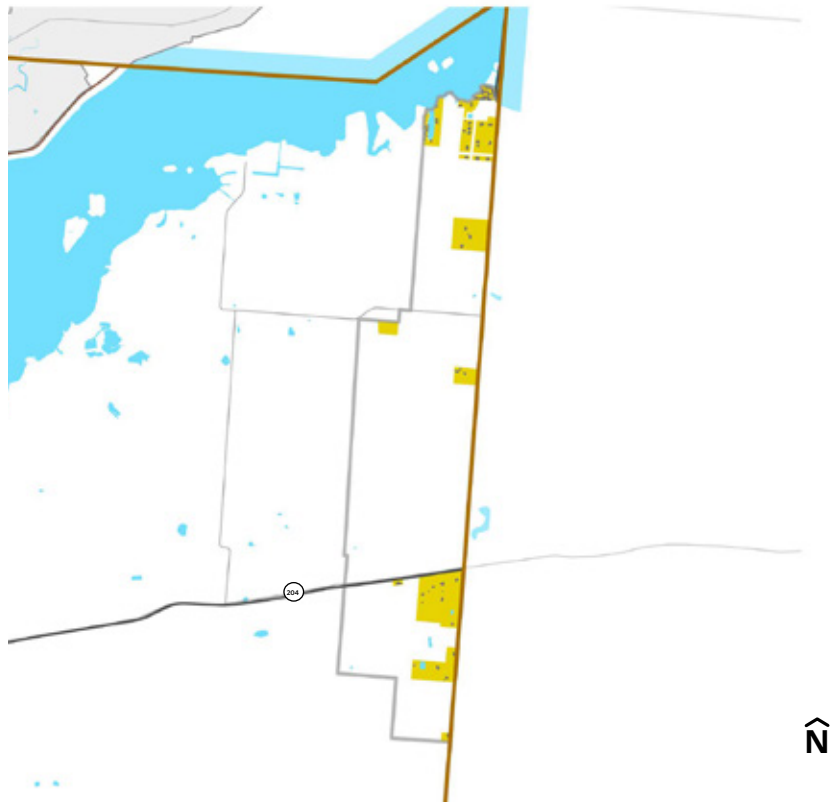
G. Liberty Union-Thurston School District

There are 2,915 housing units in this school district, with 2,847 single-family units and 68 multi-family units.
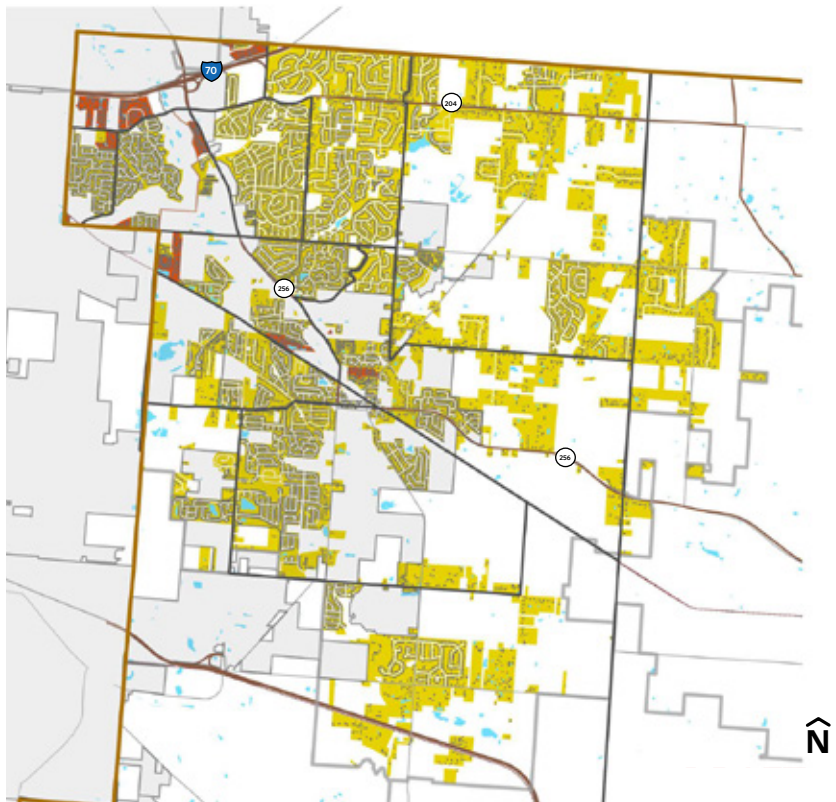

H. Northern School District

There are 103 housing units in this school district, with 102 single-family units and 1 multi-family unit.

I. Pickerington School District

There are 15,831 housing units in this school district, with 15,720 single-family units and 111 multi-family units.

J. Reynoldsburg School District

No map shown. There is no residential land in this school district within Fairfield County.

K. Southwest Liicking School District

There are 449 housing units in this school district, with 449 single-family units and no multi-family units.

L. Teays Valley School District

There are 228 housing units in this school district, with 228 single-family units and no multi-family units.
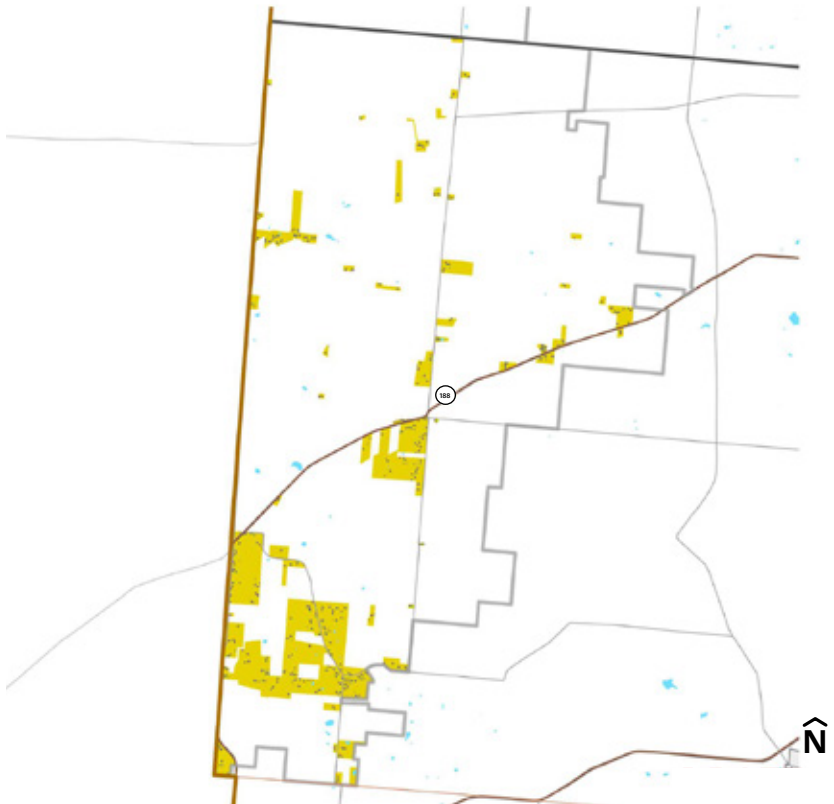
M. Walnut Township School District

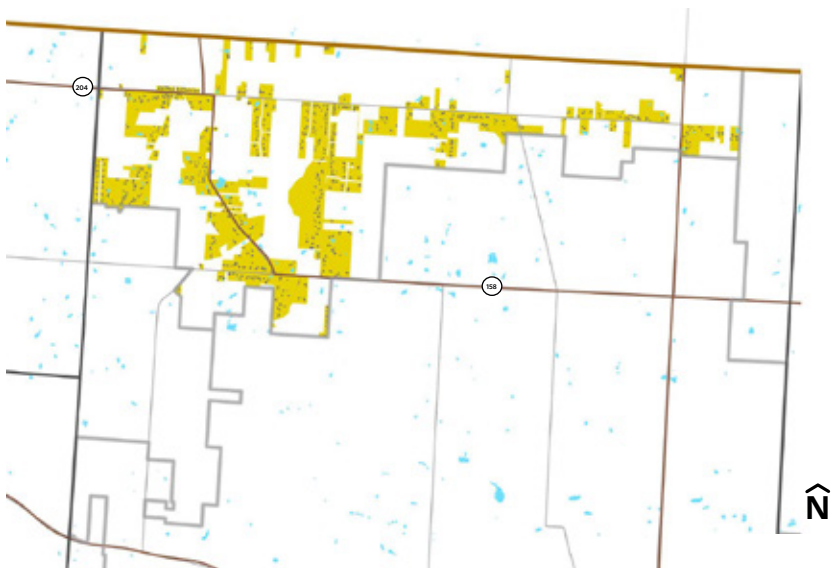There are 4,097 housing units in this school district, with 4,047 single-family units and 50 multi-family units.
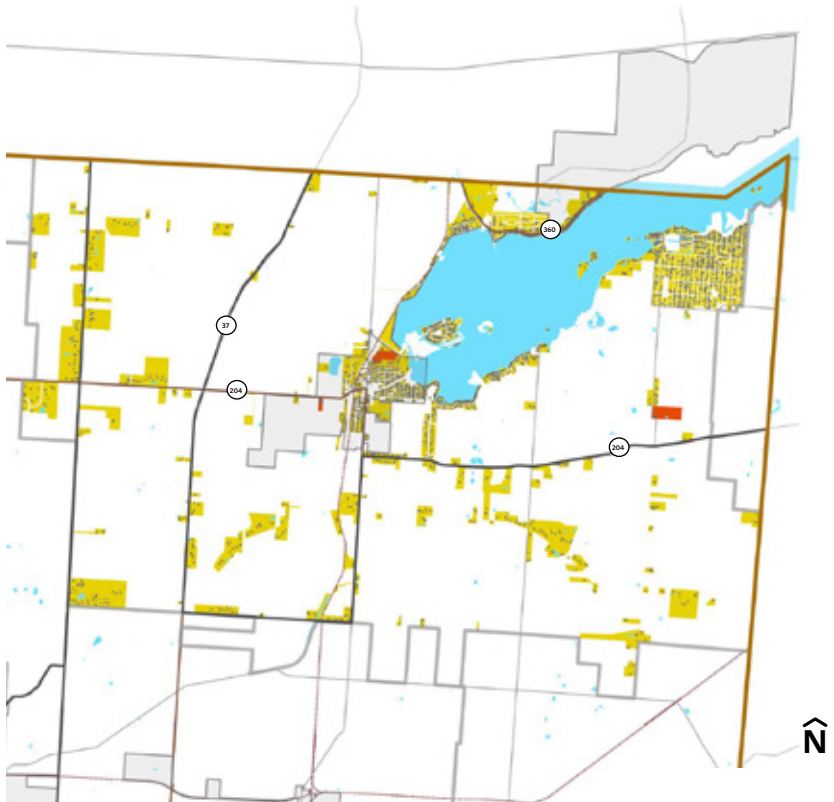
A.2 Supplemental Information to Section 2.2 Drivers of Change
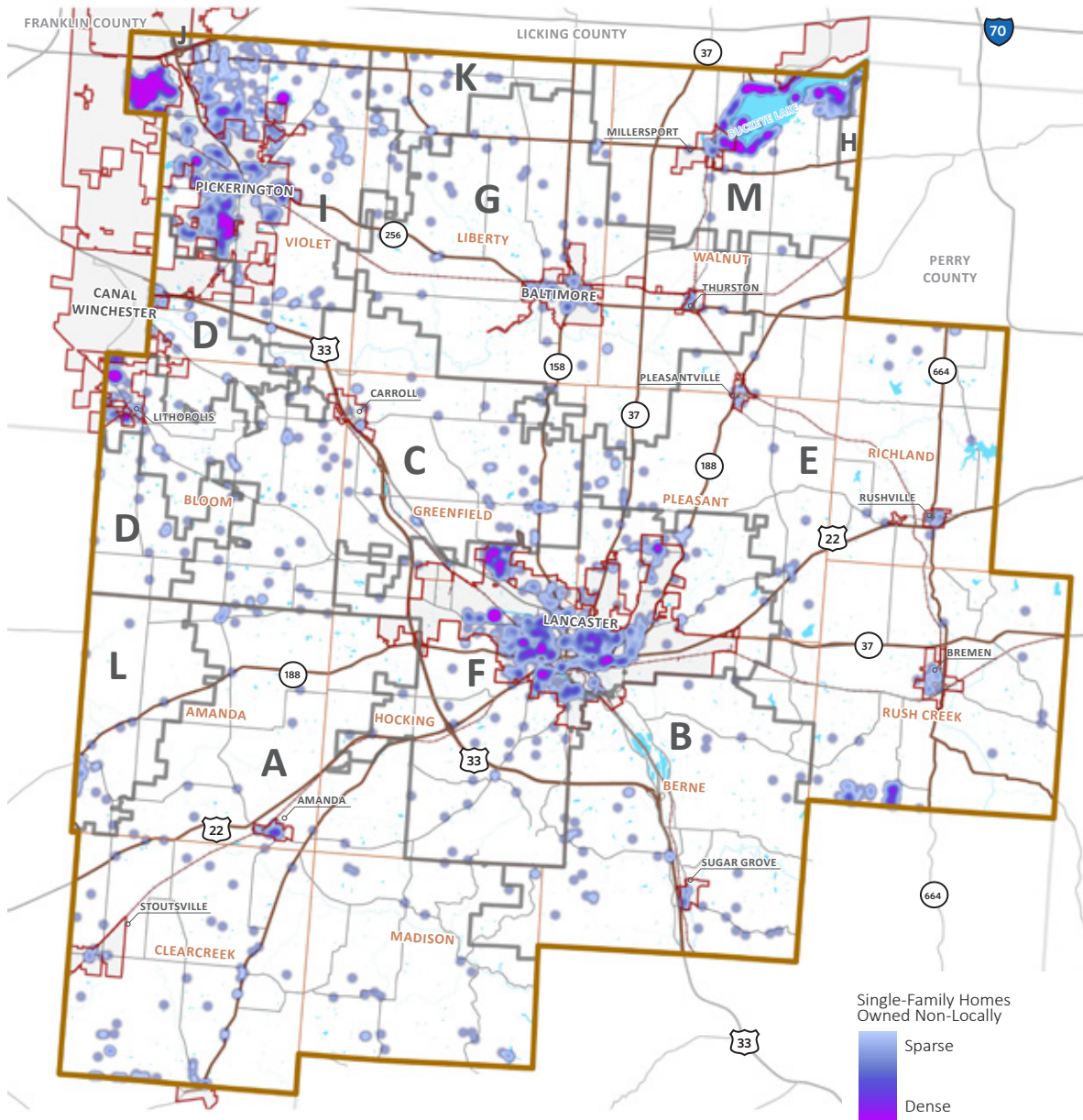
Single-Family Homes Owned Non-Locally

Approximately 5% of single-family homes are owned by "non-residents", with Pickerington and Lancaster representing about 56% of the total.

source: County Assessors data

Single-Family Homes Owned by
American Homes 4 Rent

Sparse

Dense
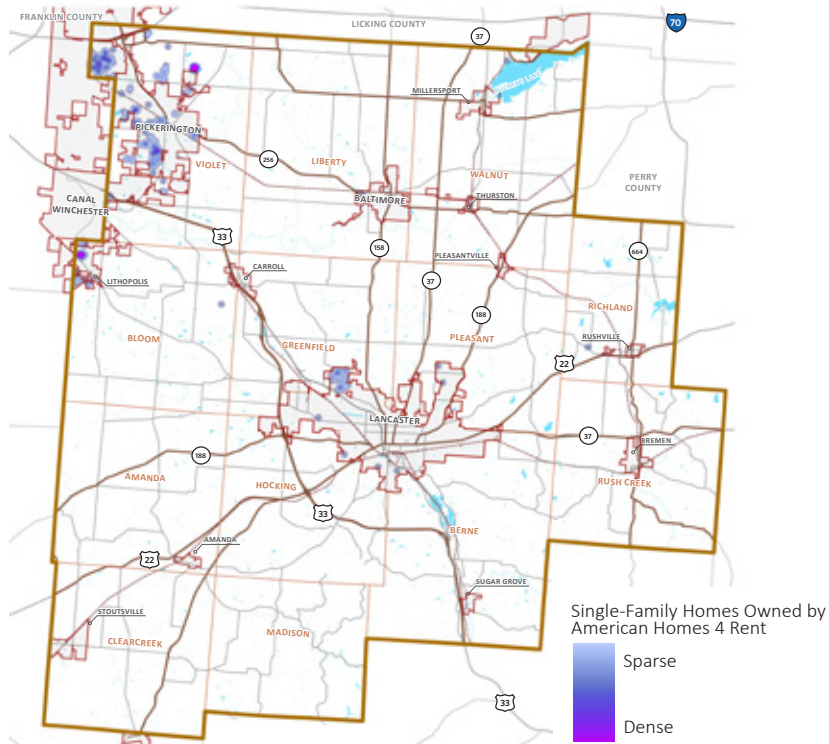
Single-Family Homes Owned by American Homes 4 Rent

24% of the non-locally owned single-family homes are owned by 11 owners, with American Homes 4 Rent Properties holding the largest amount.

TOP NON-LOCAL OWNERS BY PROPERTIES OWNED		
Owner	**Properties**	**Location**
AMERICAN HOMES 4 RENT PROPERTIES	294	Calabasas, CA
FKH SFR PROPCO	89	Marietta, GA
PROGRESS RESIDENTIAL BORROWER LLC	64	Scottsdale, AZ
STAR BORROWER SFR4 LP	49	Greenwich, CT
ALTO ASSET COMPANY	26	Austin, TX
ALICE WRIGHT PROPERTIES LLC	24	Columbus, OH
CHAD A GUISINGER	18	Asheville, OH
CAPGROW HOLDINGS JV SUB VI LLC	11	Chicago, IL
JB LEGACY LLC	11	Columbus, OH
MCH SFR PROPERTY OWNER	10	Miami Lakes, FL
VSP2 HOMES LLC	10	Elmsford, NY
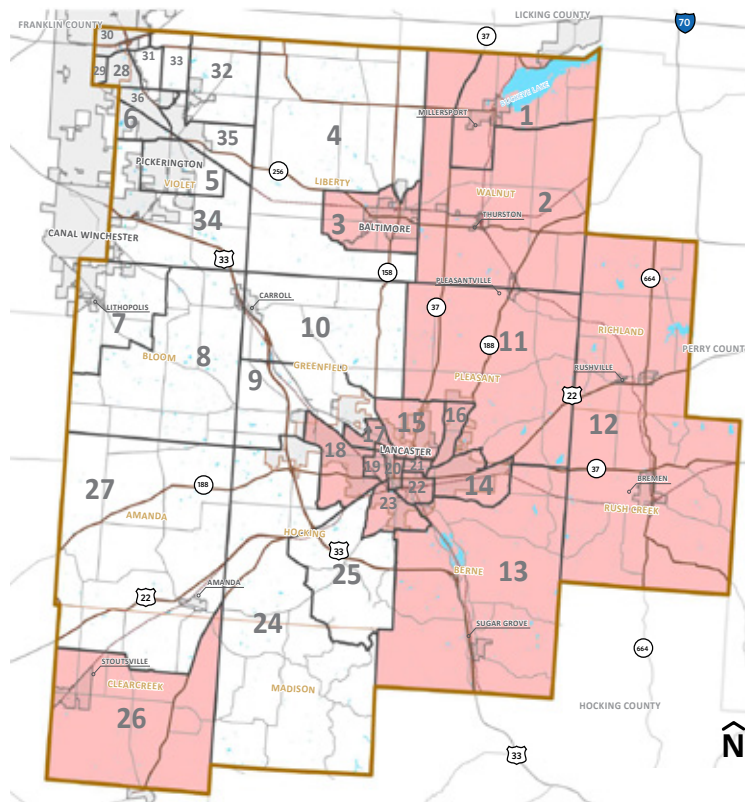
Census Tract where 50% or more housing units were built before 1980

Percentage of housing units built before 1980

The eastern portion of Fairfield County represents the majority of the census tracts where over half of the housing stock was built before 1980.

Census Tract	Total Units	Units Built Before 1980
1	2134	1404
2	1263	649
3	1472	1081
4	1675	732
5	2383	580
6	1408	289
7	1545	597
8	2008	933
9	2056	313
10	1592	770
11	2370	1566
12	2496	1303

Census Tract	Total Units	Units Built Before 1980
13	1991	1250
14	1408	1038
15	966	610
16	2200	1257
17	1502	874
18	3112	2087
19	1719	1561
20	1607	1537
21	1459	1440
22	1557	1375
23	1881	1776
24	1261	472

Census Tract	Total Units	Units Built Before 1980
25	672	225
26	1183	695
27	1333	664
28	1815	221
29	1142	106
30	2032	76
31	1465	296
32	2068	753
33	1793	638
34	1964	503
35	1735	559
36	2476	332
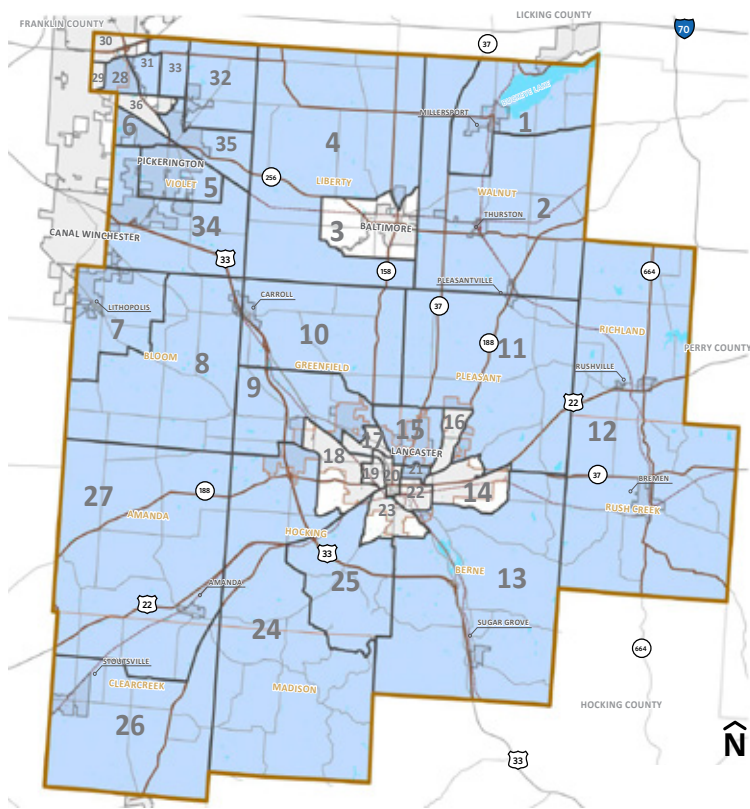
Census Tract where 75% or more housing units are owner-occupied

Percentage of owner-occupied housing

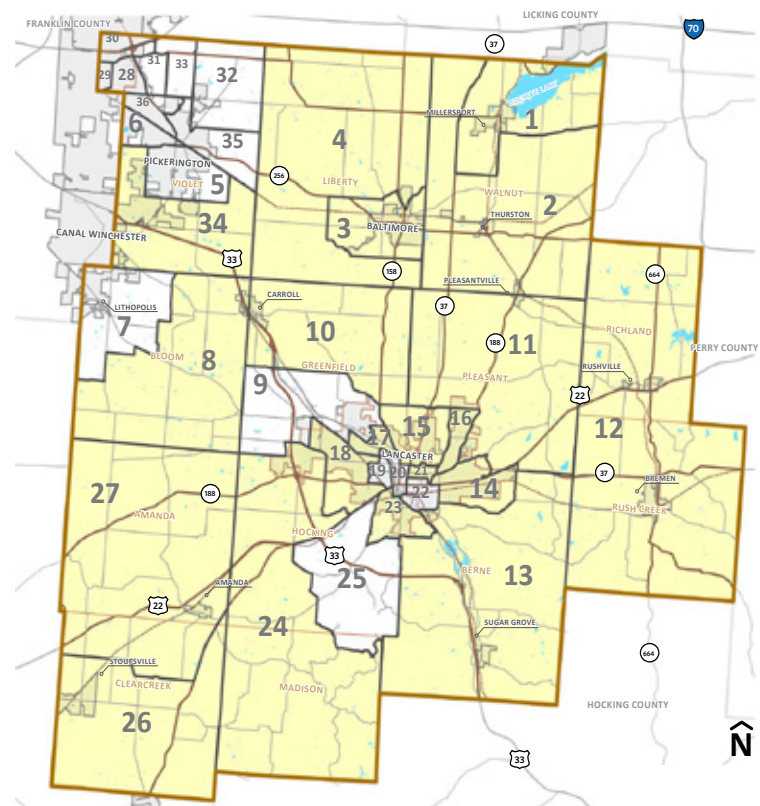The majority of Fairfield County has a high owner occupancy rate, with Lancaster and Baltimore being outliers.

Census Tract	Total Units	Owner-Occupy Units
1	1678	1338
2	1172	999
3	1449	834
4	1631	1553
5	2369	2179
6	1408	1365
7	1497	1352
8	1929	1765
9	1943	1671
10	1480	1384
11	2263	1916
12	2381	2069

Census Tract	Total Units	Owner-Occupy Units
13	1927	1621
14	1363	818
15	915	868
16	2058	918
17	1337	557
18	2921	1966
19	1491	783
20	1385	375
21	1267	997
22	1231	582
23	1815	1086
24	1146	895

Census Tract	Total Units	Owner-Occupy Units
25	672	514
26	1140	981
27	1305	1144
28	1798	1425
29	1097	771
30	1907	51
31	1450	1347
32	1989	1843
33	1729	1729
34	1934	1734
35	1687	1327
36	1959	1217

Census Tract where 30% or more of the population is 60 years or older

Population that is 60 or older

The census tracts in the majority of Fairfield County have 30% or more of the population represented by people who are 60 years or older.

Census Tract	Population	Population Over 60
1	3819	1488
2	2867	1198
3	3410	1053
4	4812	1606
5	8249	1247
6	4247	711
7	4465	1280
8	5783	1981
9	5610	1389
10	4182	1538
11	5355	2009
12	6610	2091

Census Tract	Population	Population Over 60
13	4923	1878
14	3301	1386
15	2290	812
16	4789	1565
17	3281	1004
18	6602	2524
19	4000	710
20	3539	511
21	2912	983
22	2847	815
23	3939	1374
24	3119	1345

Census Tract	Population	Population Over 60
25	3159	712
26	3378	1223
27	3411	1303
28	4733	1041
29	4307	706
30	4374	914
31	4463	1332
32	6083	1221
33	5637	1589
34	5193	1599
35	4515	1306
36	5167	1306

A.3 Supplemental Information to Section 2.3 Housing Affordability

30% + **Less than 30%**
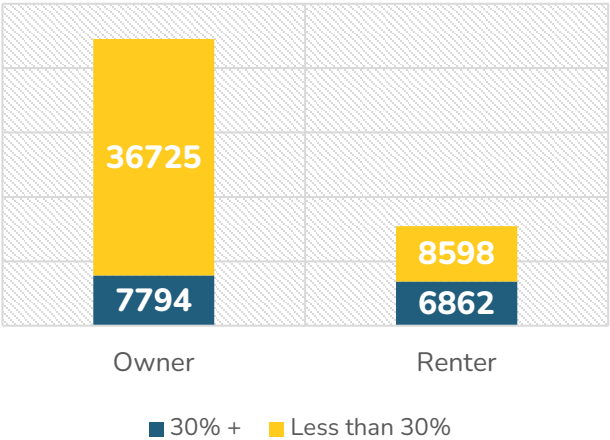
Households by the percentage of income spent on housing

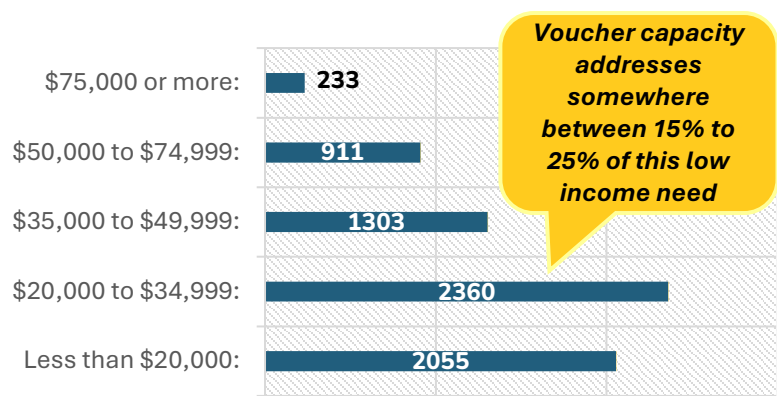17 % of homeowners are cost burdened, while 47% of renters are. This is a fairly typical distribution. This data was sourced from the 2023 American Community Survey.

Not likely new owners given housing price points over last decade
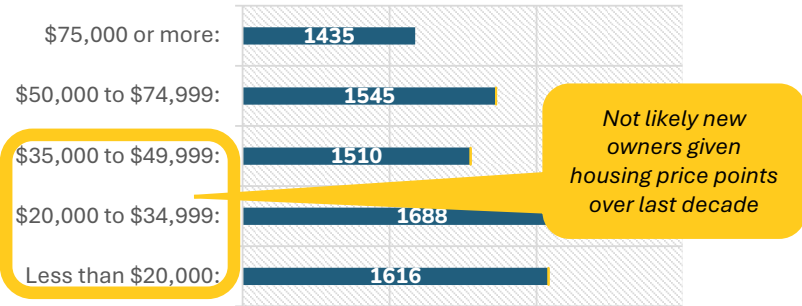
Households that are 65 or older's income

62% of households that are 65 or older have incomes under $50,000 annualy. This data was sourced from the 2023 American Community Survey.

Voucher capacity addresses somewhere between 15% to 25% of this low income need

Income	Count
$75,000 or more:	233
$50,000 to $74,999:	911
$35,000 to $49,999:	1303
$20,000 to $34,999:	2360
Less than $20,000:	2055

Household income among renters

64% of rents have an income that is lower than $35,000. This data was sourced from the 2023 American Community Survey.

| % of household income to rent	Count
30%	1433
35 to 39%	1169
40 to 49%	1414
50% +	2846

% of household income to rent
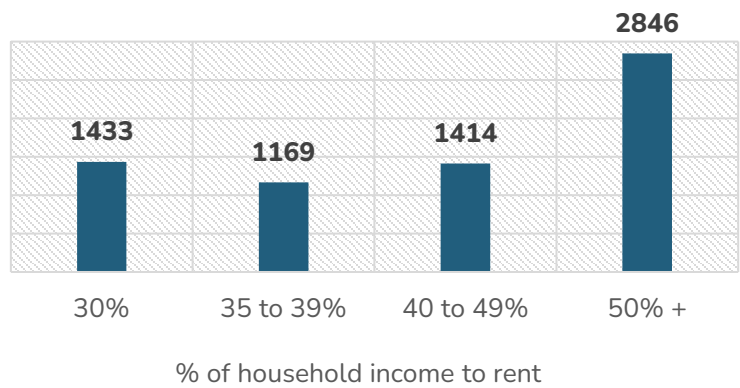
Percentage of income that renters are paying toward housing

Almost 80% of renters are paying more than 35% of their income toward housing. 42% are paying more than 50% of their income. This data was sourced from the 2023 American Community Survey.
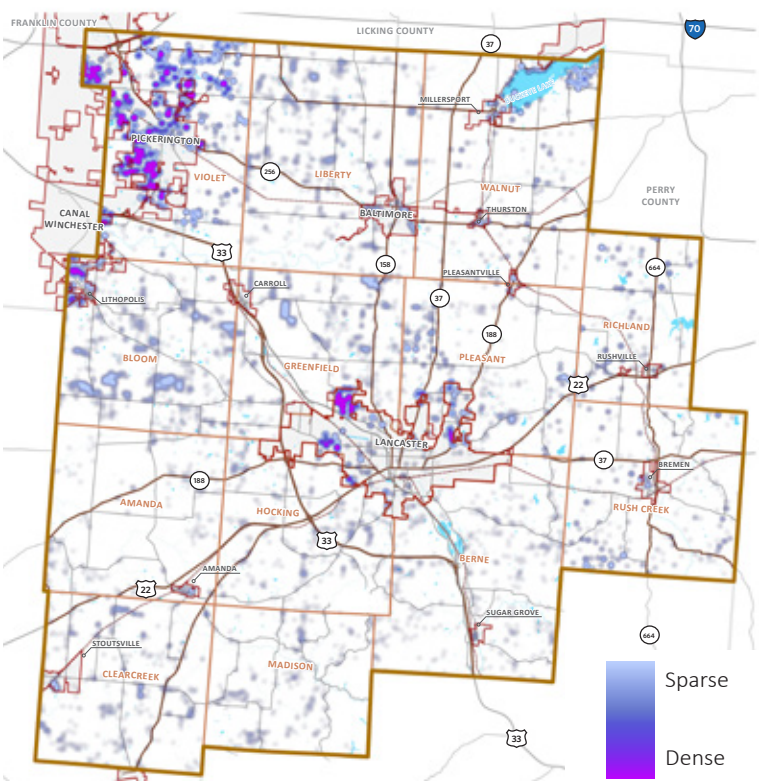
A.4 Supplemental Information to Section 2.4 Aligning Housing Development with Housing Needs
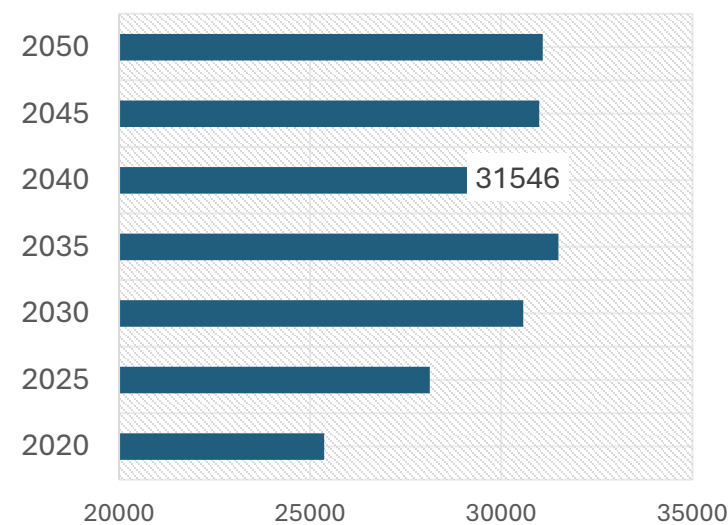
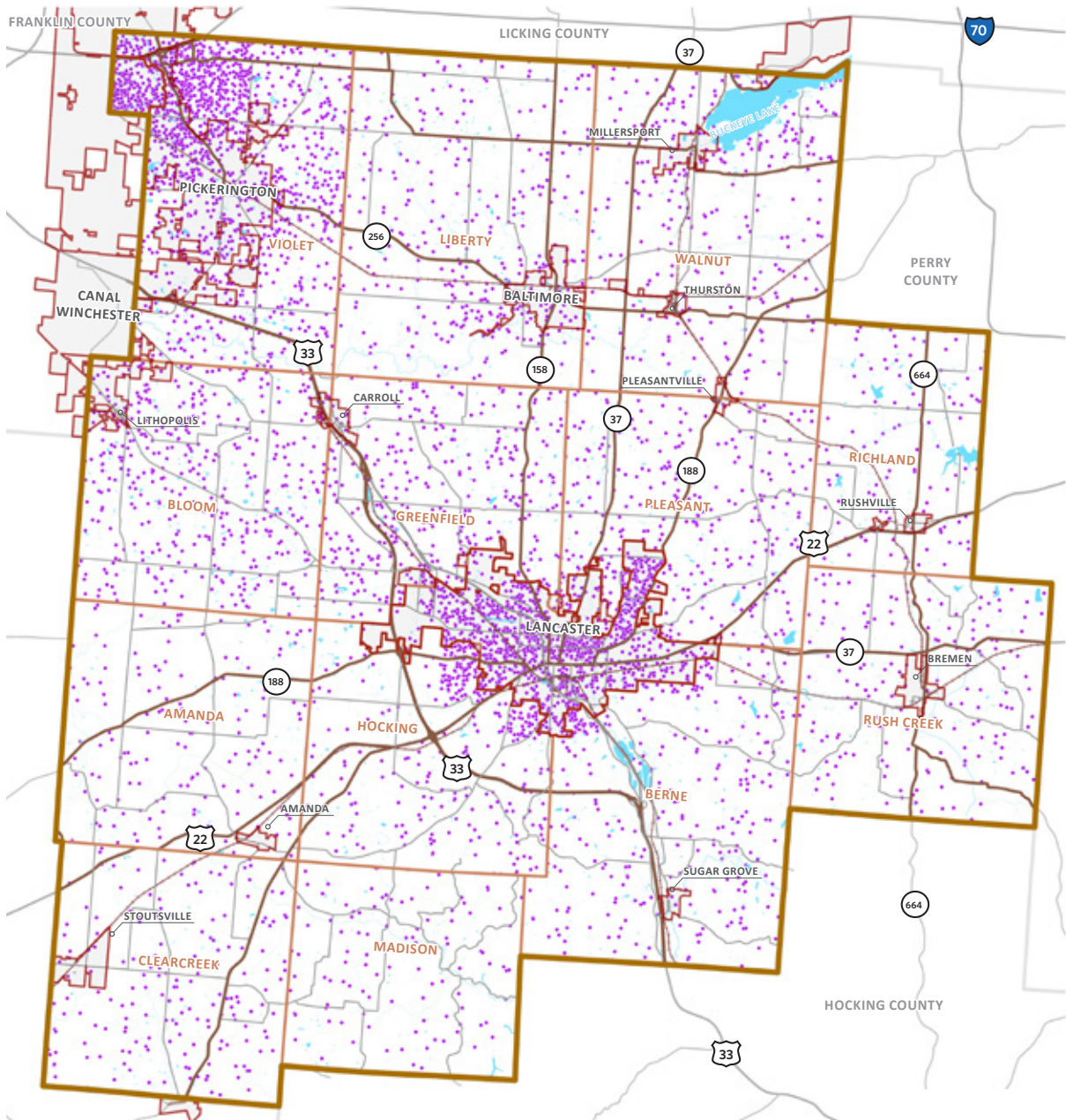**Population that is 65 or older forecast**

The population that is 65 or older is expected to grow until 2040.

Concentration of homes that were built in the past 30 years

A majority of the new housing development in Fairfield County has been concentrated near Columbus.

Dot density of population aged 55 or older by census tract

Each dot represents 10 people that are aged 55 years or older. Dots are randomly placed within the census tract area.

There is a substantial population of homeowners who may potentially be interested in "resizing" and still want to remain in Fairfield County. There are approximately 9,600 owner-occupied households that are between 55 and 64 years of age. This population may be looking to downsize or resize particularly reguarding homecare responsibilities.

A.4 Supplemental Information to Section 3 Impact of Housing on Schools

District	2001	FY10	FY15	FY16	FY17	FY18	FY19	FY20	FY21	FY22	FY23	FY24	FY25
Amanda-Clearcreek Local	1621	1776	1552	1538	1481	1459	1445	1407	1412	1477	1516	1543	1481
Berne Union Local	1025	956	869	876	866	860	829	843	759	803	842	832	810
Bloom-Carroll Local	1457	1712	1903	1925	1939	2014	2044	2088	2152	2217	2244	2258	2273
Fairfield Union Local	1913	2081	1932	1930	1923	1903	1904	1928	1892	1886	1917	1913	1869
Lancaster City	6182	6133	6220	6289	6395	6394	6381	6464	6161	6115	6267	6224	6123
Liberty Union-Thurston Local	1372	1411	1302	1311	1317	1260	1222	1208	1161	1211	1204	1175	1153
Pickerington Local	7598	10641	10215	10185	10236	10468	10658	10739	10451	11014	11377	11558	11728
Walnut Township Local	743	668	563	527	530	542	487	484	471	483	491	482	480
COUNTY TOTAL	21911	25378	24556	24581	24687	24900	24970	25161	24459	25206	25858	25985	25917

School district head count for Fairfield County

District headcount for Fairfield County is trending back up. A note for Pickerington Local is that the district head count has increased by 54% since 2001, but most of the growth occured between 2001 and 2010. This data was sourced from the Ohio Department of Education and Workforce enrollment data.
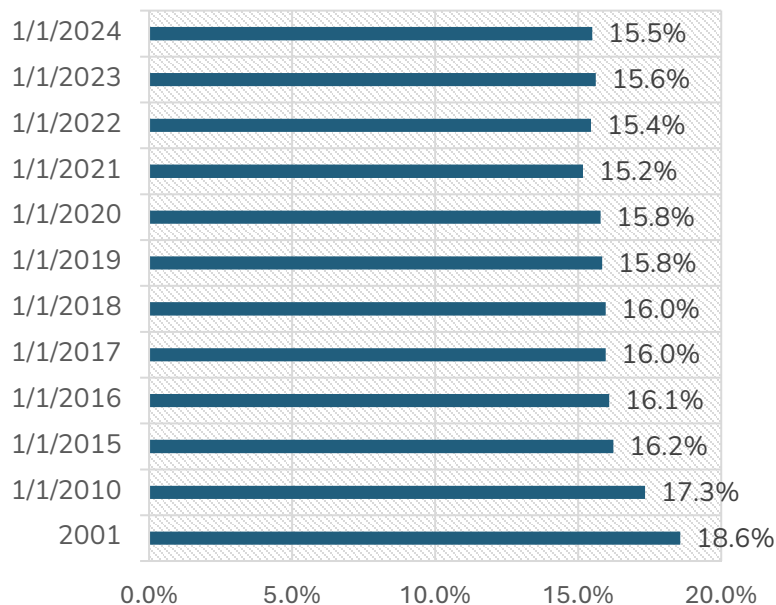
Children in public school as a percentage of the population

The percentage is near all-time lows. This data was sourced from the 2023 American Community Survey

HOUSEHOLDS IN THE COUNTY		
ACS 5 Year Estimates	**2023**	**2018**
Total Households	59,979	55,578
Households w/ Children	34,150	34,028
Under 3 Years	4,666	4,637
3 and 4 Years	3,302	3,464
5 Years	1,902	1,827
6 to 11 Years	11,633	11,255
12 to 17 Years	12,647	12,845
% Households with Children	57%	61%

Important household statistics

This suggests that households with children increased by less than 1% over a 5-year period compared to all households, which was an 8% increase during that period. This data was sourced from the 2023 American Community Survey

Residential, Low (single-family)	Year Built	Units	Housing Units/Acre	Student/Acre (K-12)	Students per 100 Housing Units
Anderson Meadows	2013	81	3.0	2.7	87.7
The Estates At Hoffman Farms	2007	335	2.4	2.8	116.1
Lakewood	2003	461	2.3	1.9	81.8
Hoffman Farms	2001	519	2.3	2.1	88.2
Britton Farms	1995	299	2.5	1.8	70.9
River Landings	1990	401	3.2	1.6	48.4
Residential, Medium (small apartments/condos)					
Hilliard Square Apts	1986	156	11.9	0.5	3.8
Crystal Lake Apts	1988	204	11.6	6.1	52.5
Parkside Apts	1988	51	10.9	4.7	43.1
Leap Rd Village Apts	1985	60	10.8	2.3	21.7
Heritage Green Apts	1997	179	4.8	3.1	64.8
Tremont Club Condos	1995	150	4.5	0.5	12.0
Coventry Manor	2000	136	4.4	0.3	6.6
Residential, High (large apartments)					
Landmark Lofts	2016	204	31.0	1.8	5.9
Eagle Pointe (Heritage Preserve Apts)	2017	300	11.9	1.2	10.3
The Pointe	2016	218	12.2	1.4	11.5
Brooklands	2014	446	15.7	1.0	6.3
Avery Pointe	2015	190	15.4	4.5	29.5
The Square At Latham Park	2017	174	10.3	1.6	15.5

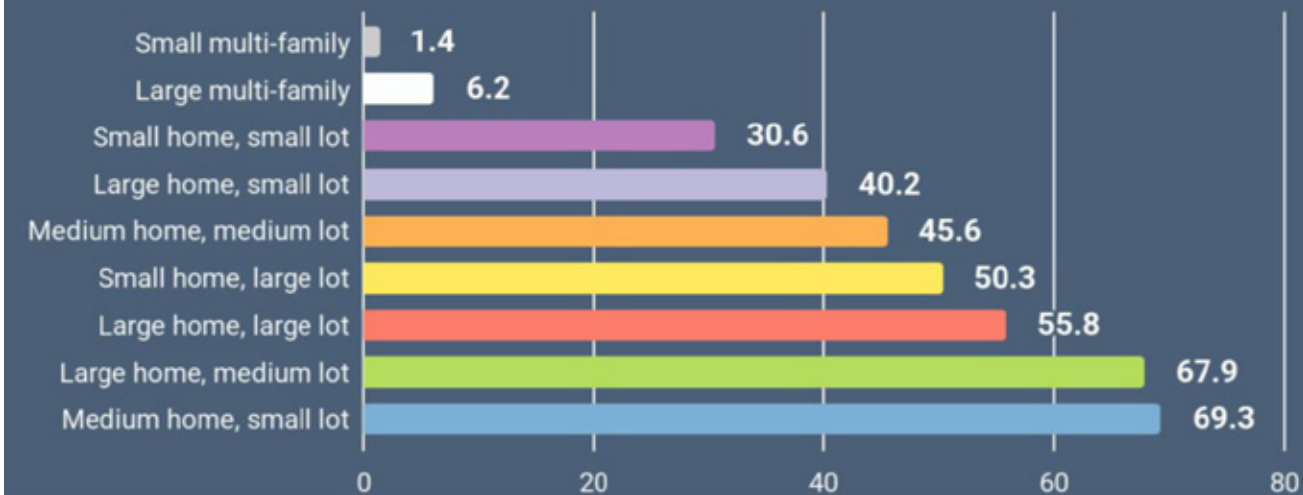**Student yields of select housing development from 2021**

This data is from Hilliard, Ohio, and shows that there is substantial evidence that new apartments are not generating a considerable amount of new students in a school district.

Enrolled students per 100 housing units

This data is from Upper Arlington, Ohio, and, again, shows that new apartments are not generating more students at high rates.

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	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

This page is left intentionally blank.

HOUSING TYPES

The following pages detail several prominent types of housing as identified by the Fairfield County Auditor. For each housing type, there is a heat map of where those homes are located in the county, a list of key statistics about that type, and several images of that type of housing in the county.
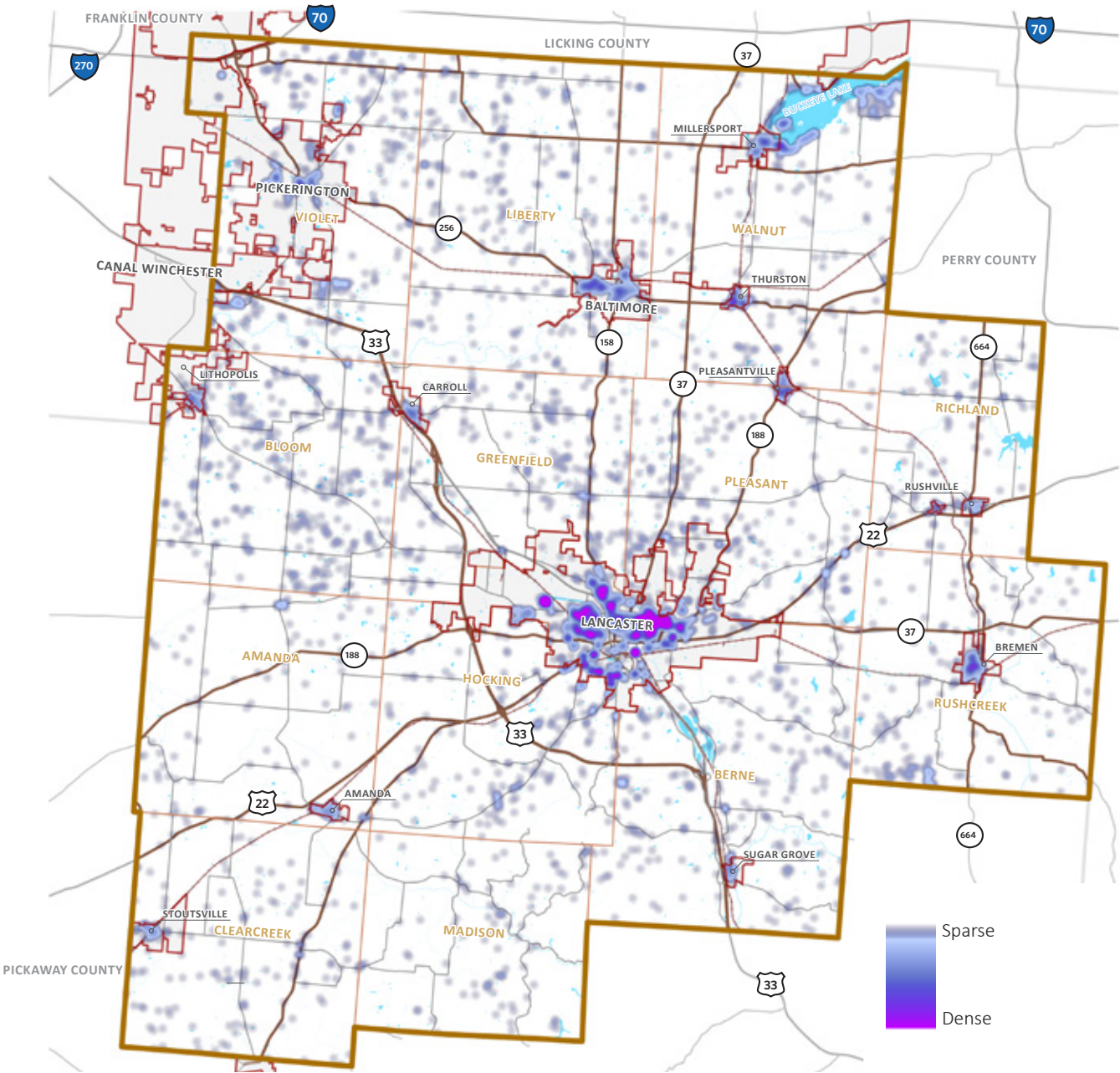
APPENDIX B

Housing Types
Cape Cod Homes
Colonial Homes
Condominium Homes
Duplex Homes
Modern Style Two Story Homes
Multi-Family Homes
Old Style Two Story Homes
Ranch Homes

Cape Cod Homes

The map depicts a heat map of cape cod style homes within Fairfield County.

Key Statistics

- 5,733 homes in the County
- Average lot size: 4.61 acres
- Median lot size: 0.30 acres
- Average home size: 1,571 sq. ft.
- Median home size: 1,395 sq. ft.
- Average appraised value: $226,949
- Average year built: 1942

Colonial Homes

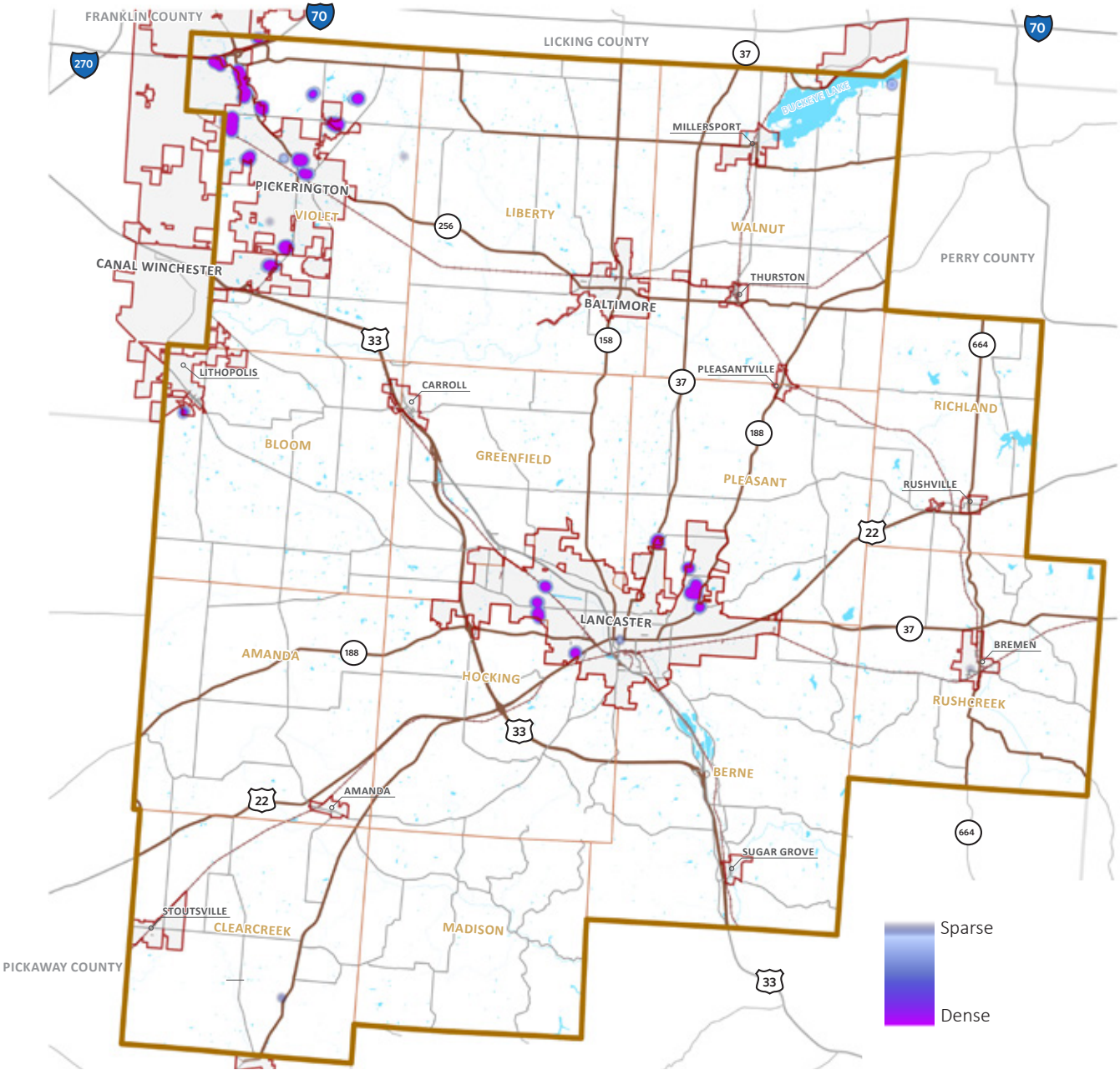The map depicts a heat map of colonial style homes within Fairfield County.
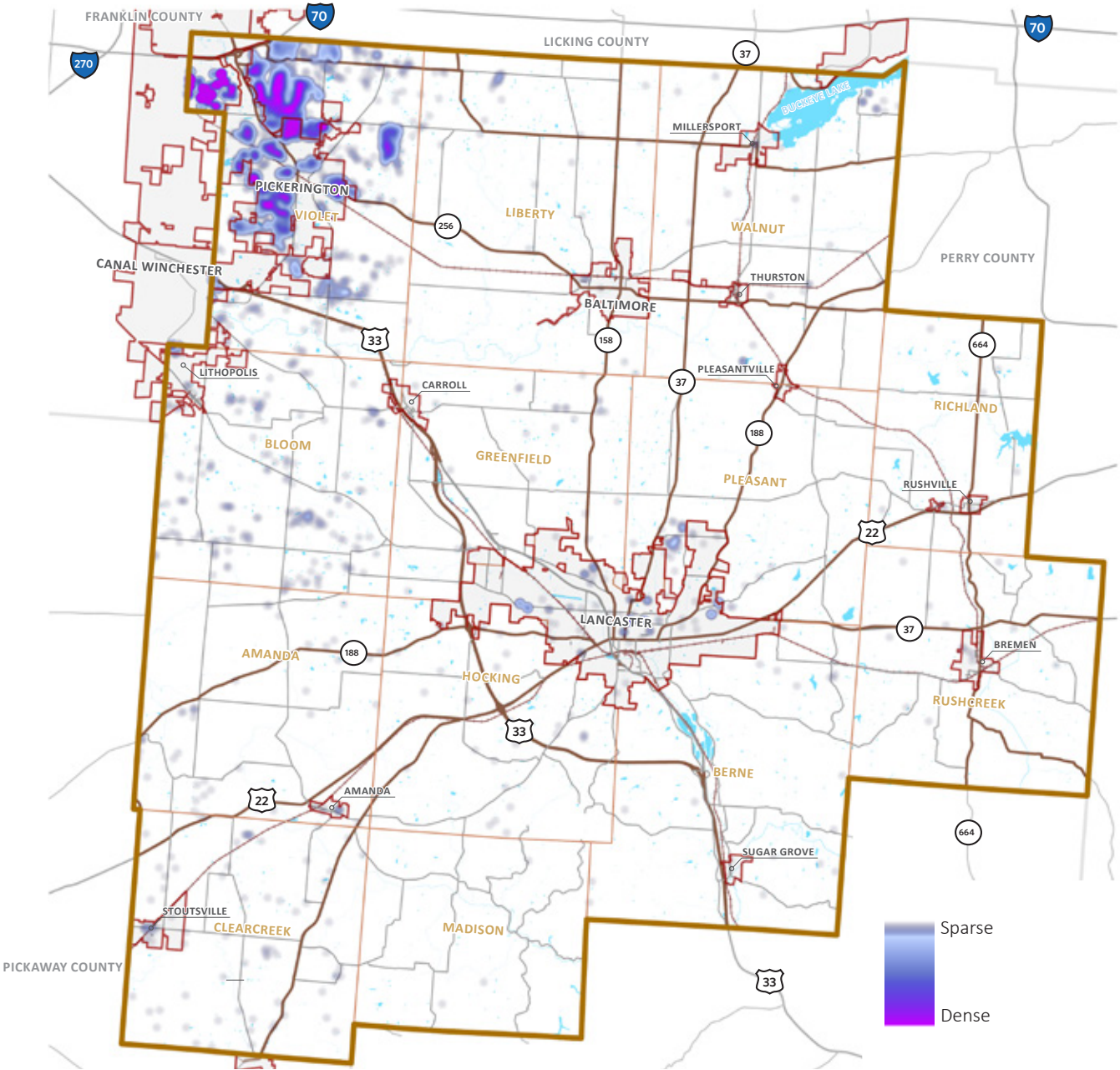
Key Statistics

- 6,777 homes in the County
- Average lot size: 0.93 acres
- Median lot size: 0.31 acres
- Average home size: 2,209 sq. ft.
- Median home size: 2,165 sq. ft.
- Average appraised value: $296,579
- Average year built: 1991

Condominium Homes

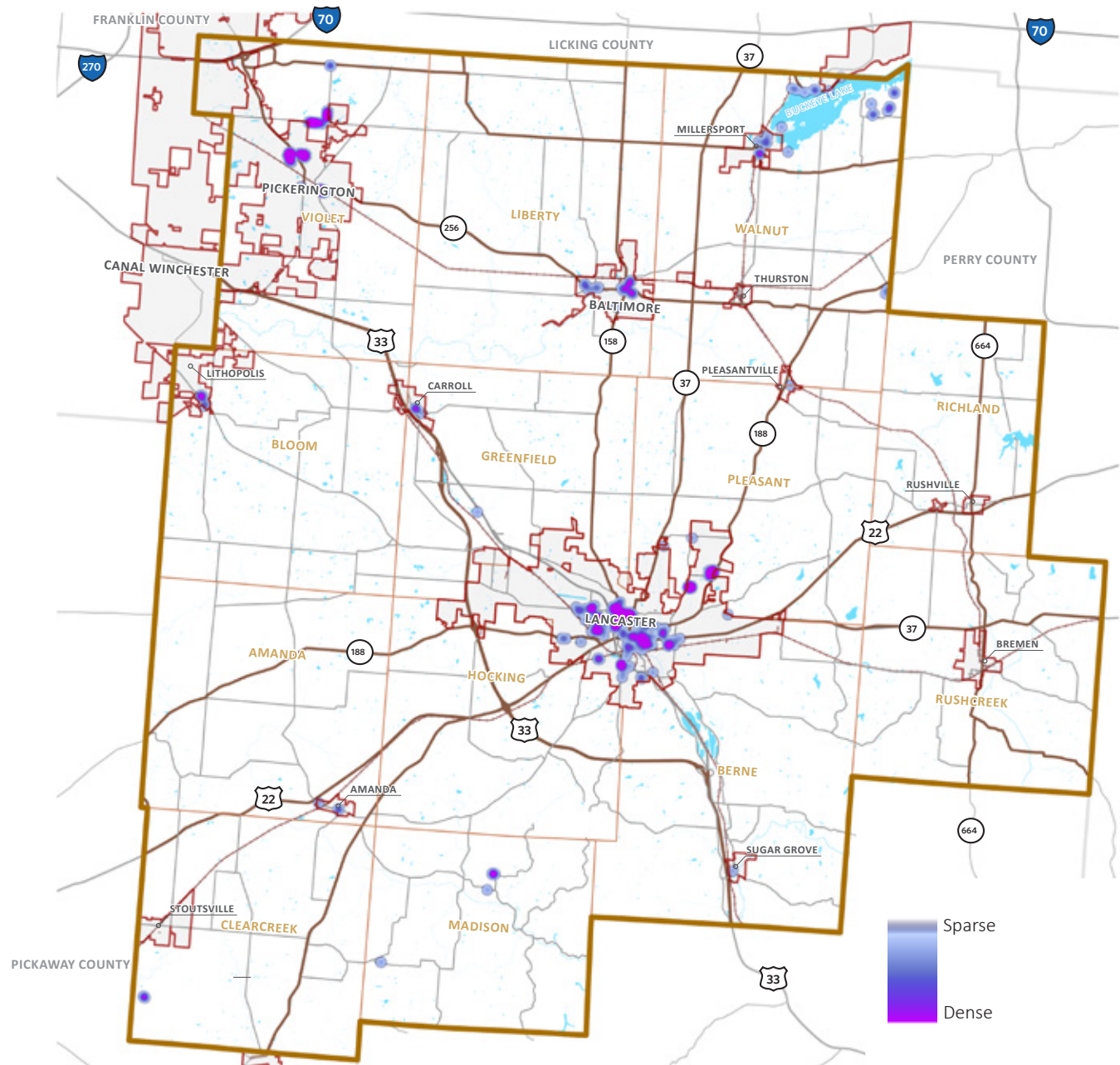The map depicts a heat map of condominium style homes within Fairfield County.

Key Statistics

- 2,493 homes in the County
- Average lot size: 0.07 acres
- Median lot size: 0.03 acres
- Average home size: 1,385 sq. ft.
- Median home size: 1,311 sq. ft.
- Average appraised value: $183,553
- Average year built: 2001

Duplex Homes

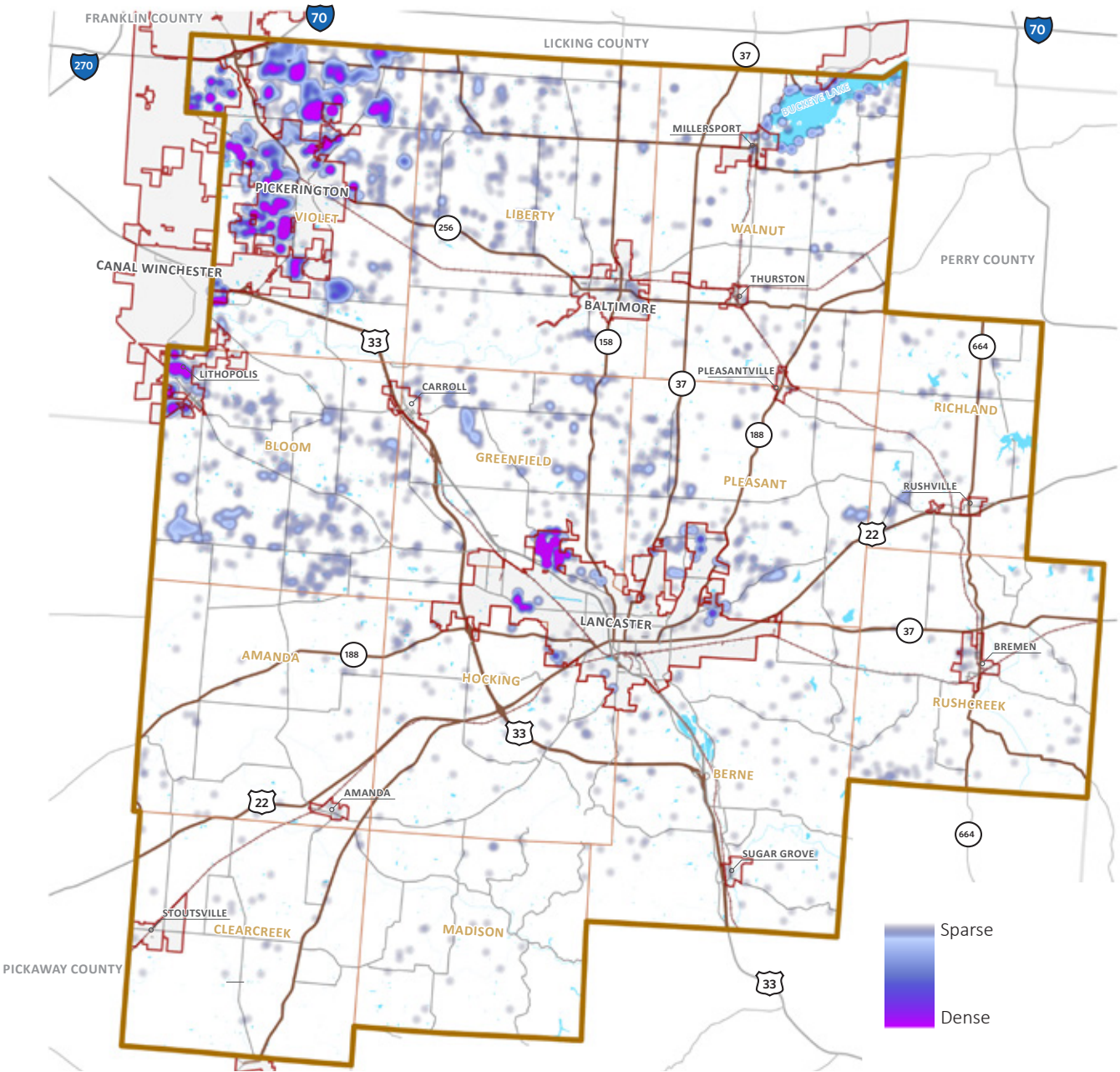The map depicts a heat map of duplex style homes within Fairfield County.

Key Statistics

- 325 homes in the County
- Average lot size: 0.28 acres
- Median lot size: 0.20 acres
- Average home size: 2,145 sq. ft. (1,072 per unit)
- Median home size: 2,040 sq. ft. (1,020 per unit)
- Average appraised value: $190,630
- Average year built: 1958

Modern Style Two Story Homes

The map depicts a heat map of modern style two story homes within Fairfield County.
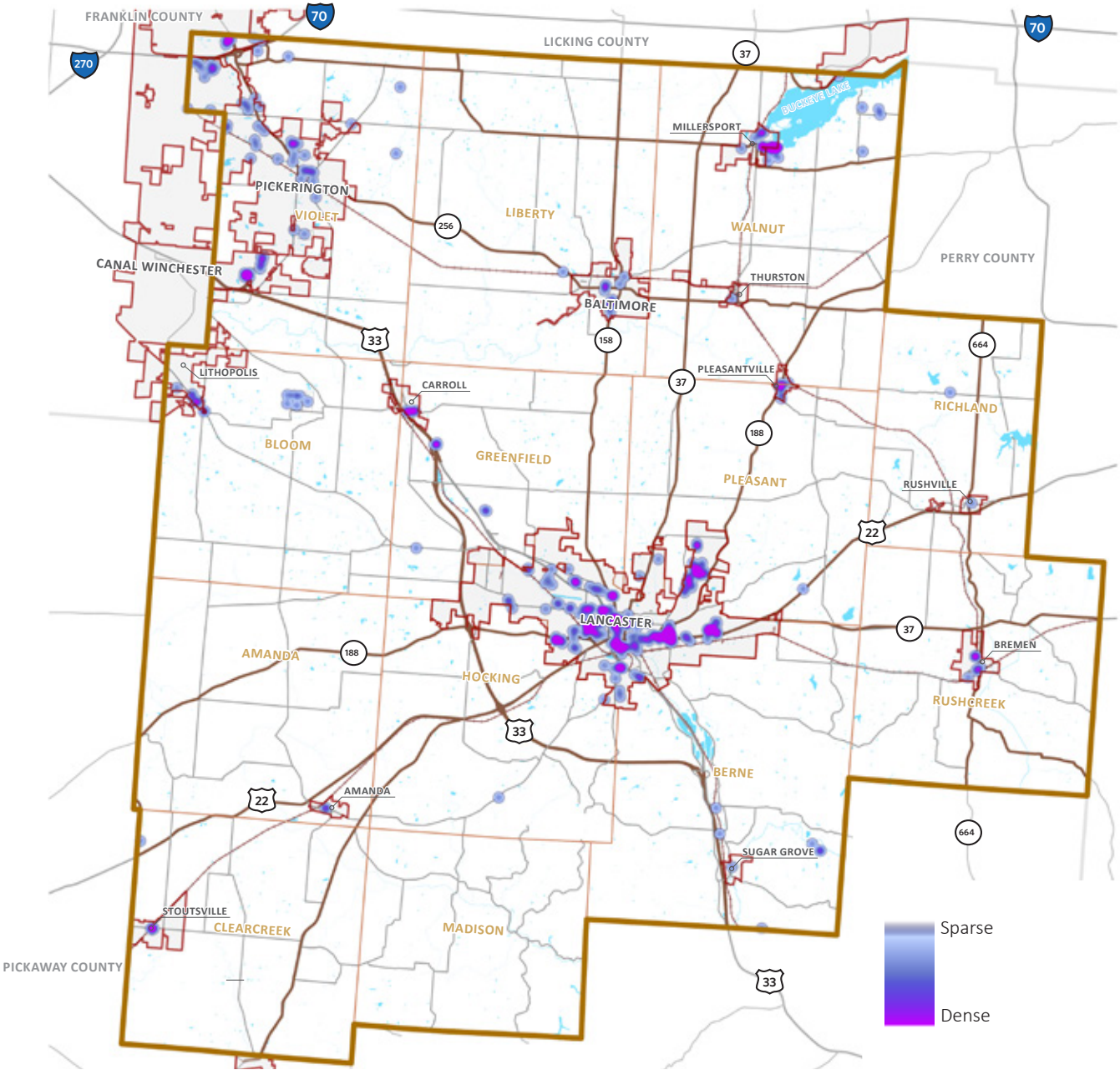
Key Statistics

- 8,772 homes in the County
- Average lot size: 1.47 acres
- Median lot size: 0.30 acres
- Average home size: 2,548 sq. ft
- Median home size: 2,469 sq. ft.
- Average appraised value: $369,101
- Average year built: 2004

Multi-Family Homes

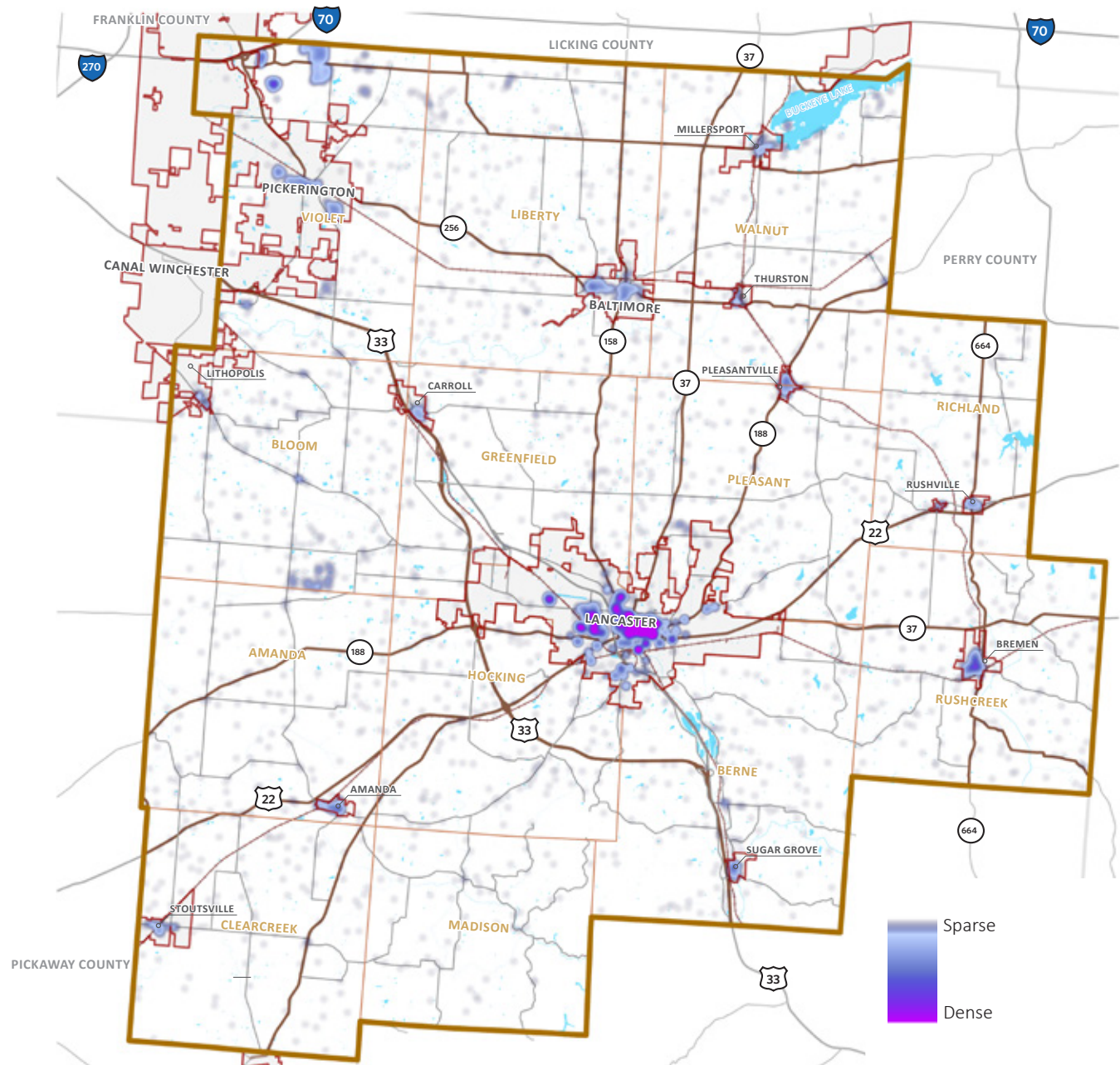The map depicts a heat map of multi-family homes within Fairfield County.

Key Statistics

- 418 parcels in the County
- 8,561 units
- Average parcel size: 3.51 acres
- Average appraised value: $1,294,889

Old Style Two Story Homes

The map depicts a heat map of old style two story homes within Fairfield County.
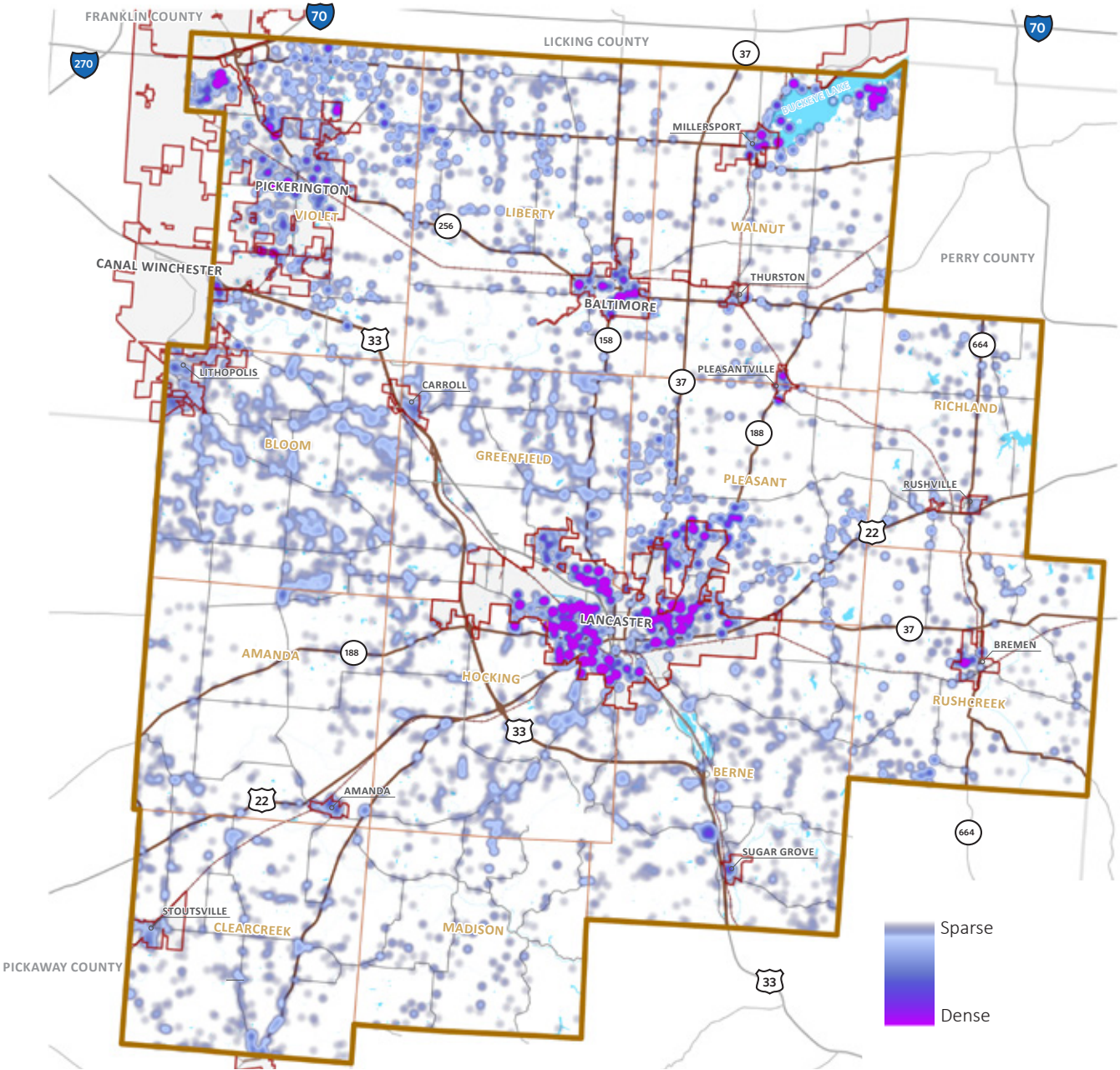
Key Statistics

- 6,211 homes in the County
- Average lot size: 7.65 acres
- Median lot size: 0.22 acres
- Average home size: 1,877 sq. ft.
- Median home size: 1,776 sq. ft.
- Average appraised value: $232,190
- Average year built: 1916

Ranch Homes

The map depicts a heat map of ranch homes within Fairfield County.

Key Statistics

- 17,638 homes in the County
- Average lot size: 2.38 acres
- Median lot size: 0.53 acres
- Average home size: 1,517 sq. ft.
- Median home size: 1,428 sq. ft.
- Average appraised value: $241,793
- Average year built: 1975

This page is left intentionally blank.

This page is left intentionally blank.

2025
HOUSING STUDY

Fairfield County and Lancaster, Ohio
November 20, 2025

FAIRFIELD
COUNTY · OHIO
SERVE · CONNECT · PROTECT